

2023
ANNUAL
REPORT

THE WAY TO BEACH™



LETTER FROM THE PRESIDENT

To our partners and stakeholders,



Visit Pensacola's mission is to lead, connect, collaborate and communicate the importance of tourism in our community. Continuously sharing the story of tourism as an economic driver. And, as the tourism landscape comes off another strong year, Visit Pensacola has maintained unprecedented numbers.

We welcomed more than 2.5 million visitors in the past year. With travelers no longer restricted in their travel options, we worked to remain top of mind and connect with our visitors in consistent and creative ways to remind them that Pensacola is the Way to Beach.

As our over-arching campaign, The Way to Beach, entices audiences with our relaxing, beautiful beaches and then expands the story, showcasing the rich "beyond the beach" experiences that enhance a beach vacation. The research continues to show that our white-sand beaches and our down-to-earth, easy-going vibe offer visitors the getaway they want.

We shared that story in front of over 40 markets this year, which was seen more than 240 million times by travelers throughout the Southeast. We built off the success of existing campaigns, and reached travelers in new ways. We created fresh and engaging content, and we worked together to support and collaborate with our local partners to tell our story, attract group business, and host media in market.

All of these efforts contribute to the success of our entire community and Visit Pensacola.

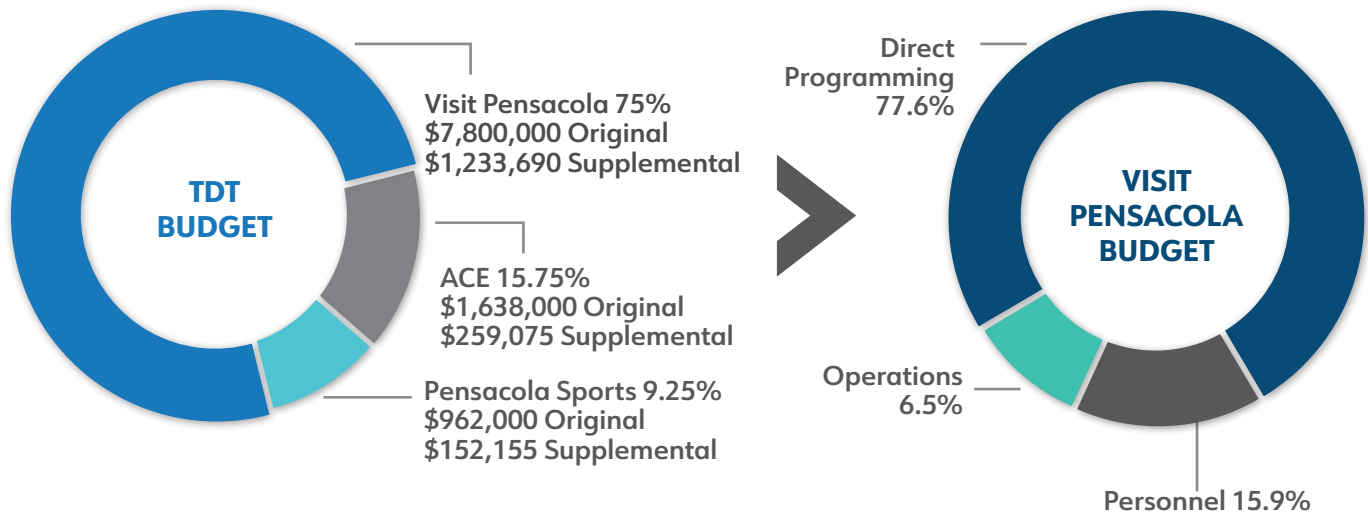
The results speak for themselves. In the FY 22/23 visitors to Escambia County generated more than \$21.5 million in vitally important TDT revenue.

Thank you to everyone who has helped share the story of why Pensacola is The Way to Beach!

A handwritten signature in black ink, consisting of a series of loops and a long horizontal stroke extending to the right.

Darien Schaefer
President & CEO
Visit Pensacola

FY22/23 BUDGET OVERVIEW



FY23 Unified TDT Budget:

\$10,400,000 Original Budget Allocation
\$1,644,920 Supplemental Funding

Visit Pensacola Budget

TDT Original Allocation \$7,800,000
TDT Supplemental Allocation \$1,233,690
Private Revenue \$441,700

VP Total Budget \$9,475,390

American Magic Funding
Pass-thru Expense \$1,000,000

Advertising Agency
(Showcase Pensacola)
\$5,275,374

99% of Advertising/Media Budget

93% of Advertising Budget
is Spent on Media Buys

Digital, Broadcast, Print,
Promotions, Outdoor, Etc.

ORIGINAL BUDGET ALLOCATION

DIRECT PROGRAMMING	BUDGET	%
Advertising/Media	\$4,116,800	50%
Events/Sunbelt/Mini-Grants	\$634,000	7.7%
Research	\$395,000	4.8%
Direct Sales	\$644,100	7.8%
Customer Acquisition	\$354,200	4.3%
Public Relations	\$202,400	2.5%
Tourism Development Projects	\$50,000	0.06%

OPERATIONS	BUDGET	%
Building	\$127,510	1.5%
Operations	\$323,517	3.8%
Finance/Insurance	\$85,573	1%

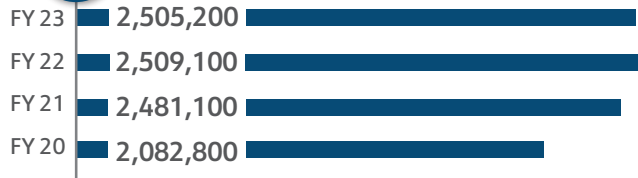
PERSONNEL	BUDGET	%
Personnel	\$1,308,600	15.9%

SUPPLEMENTAL FUNDING	BUDGET
Direct Programming-Advertising/Media	\$1,163,690
Operations-Building	\$60,000
Personnel	\$10,000

FY22/23 ANNUAL SNAPSHOT



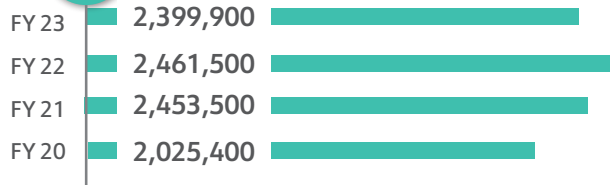
Total Visitors DOWN 0.2% over FY22



Pensacola FY2023 visitor and lodging metrics maintained with slight increases and decreases against unprecedented growth of the past few years.



Room Nights DOWN 2.5% over FY22



Direct Spending UP 0.6% over FY22

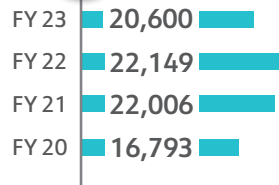


Economic Impact UP 0.9% over FY22





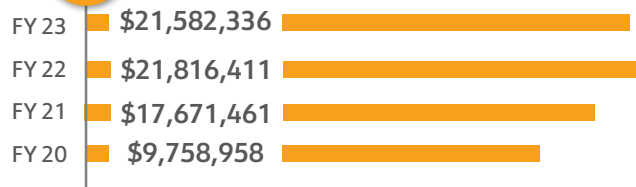
Jobs Supported DOWN 6.9% over FY22



Wages Generated UP 5.8% over FY22



Tourism Development Tax DOWN 1.1% over FY22



FY22/23 CHALLENGES

The challenges of FY2022 did not go away in FY2023. Inflation, rising costs of travel, supply chain issues, staffing shortages continued.

Travel Demand

The pent up travel demand that we experienced in 2021 and 2022 that drove record occupancy and ADR has dissipated.

More Travel Options Available

Travel options continue to grow... returning to pre-pandemic levels. If there was any remaining pent up travel demand, it was for international travel and cruises. Domestic travelers were able to travel abroad significantly more in 2023 and chose that opportunity over domestic destinations. Domestic travelers also had more choices exploring by sea as cruises reached pre-pandemic levels.

Outside Influences

The following factors specific to Florida impacted travelers' decision-making for any Florida destination, even if these issues did not directly affect Escambia County.

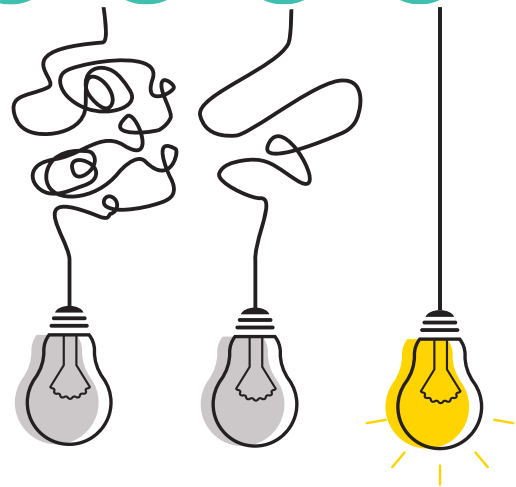
1. Media coverage of the Sargassum Blob in the Spring of 2023.
2. Leprosy outbreak in Florida.
3. Controversial political decisions in Florida.
4. Hurricanes (Ian and Nicole in late 2022 and Idalia in 2023).
5. Seven Florida beaches make top 10 'deadliest' list (Travel Lens).

Retaining Growth

Knowing that the travel demand in 2021 and 2022 has crested and would subside, the goal of Visit Pensacola has been to retain as much of the significant growth we experienced in 2021 and 2022 as possible. In 2023, despite the challenges, the impact on TDT collections were minimal, down only 1.1%.

Marketing Budget Disparity

Compared to neighboring competitive destinations, Visit Pensacola has a significantly smaller budget for advertising and promotions, with our competition allocating double or more to their marketing budgets. This constrains the destination's ability to create awareness and maintain visibility in the highly competitive tourism industry. The disparity in budgets places Visit Pensacola at a disadvantage with neighboring destinations in capturing the attention of potential visitors, impacting the pace of the overall growth and success of tourism in Escambia County.



Increased Lodging Inventory

Additional lodging and vacation rental inventory in 2023 helped drive overall revenue and maintained TDT collections, but also impacted occupancy percentages which over time impacted ADR.

Here is a short synopsis of the programs and campaigns that were implemented:



The Way To Beach™

October 2022 – September 2023

This always-on, over-arching campaign message generates traveler awareness, interest, consideration, and bookings by positioning the Pensacola Bay Area as The Way to Beach™ for travelers.

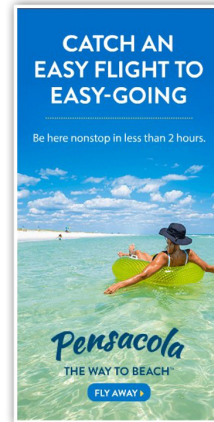
Under this umbrella, we expand and tell the whole story with other campaigns. In FY23, the campaign delivered 150,000 room nights, almost 19,000 flights, and nearly 81,000 travelers.

Visit Pensacola met the challenges of the new fiscal year headlong, responding with innovative marketing campaigns and programs that proved successful in sustaining and growing the Pensacola tourism industry.

Fly Market Support

October 2022 – September 2023

Connecting with Pensacola's direct flight markets landed more than 7,600 passengers. Dallas, Chicago, and Washington DC delivered nearly 56% of these passengers with Charlotte, Denver, Houston, Indianapolis, Nashville, Philadelphia, and St. Louis sending the rest.



Interest Marketing

October 2022 - September 2023

This native advertising effort lets history lovers, foodies, craft-beer enthusiasts, divers, birders, and fishing fiends know they can explore their specific interests here. In FY23 it generated an impressive 44.4x return on investment (ROI) and brought more than 14,000 travelers to our market.

Multi-Market Outdoor Campaign

October 2022 – September 2023

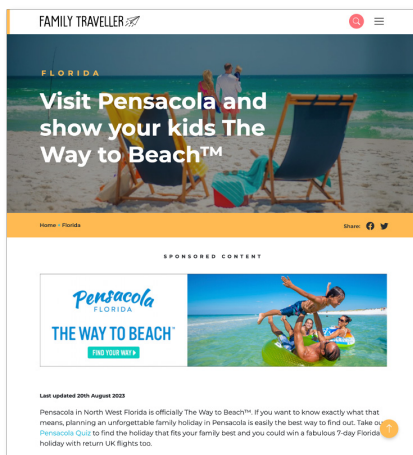
This multi-market billboard campaign featured unique messages promoting Pensacola in six strategic locations. The locations spanned Interstate 10 from Baton Rouge to Baldwin County, AL with two additional locations on I-65 enticing southbound drivers approaching Pensacola. The campaign delivered more than 65.8 million annual impressions.



While You're Here Campaign

October 2022 - July 2023

This social media campaign delivered ads to in-market visitors, highlighting the broad scope of experiences available while they're here. Ads pointed them to information on events, history, dining, outdoors, and arts & culture and generated more than 47,000 page views.



International Campaigns

October 2022 - September 2023

Visit Pensacola uses carefully curated media opportunities targeted to Canadian and UK audiences, many in conjunction with Visit Florida. One highlight of this multifaceted effort is the *Family Traveller* UK promotion which included a custom built "Way To Beach" quiz with a trip giveaway component that generated over 15,000 entries.

Alabama Football Promotion

October 2022

This upper-funnel effort targeted Alabama football fans with an in-stadium promotion, digital, print, and radio advertising. It enhanced the SEC efforts and increased overall radio advertising recall.



The Way To Beach - SEC Promotion

October 2022 - January 2023

Audience research showed our target audience loves SEC football. Broadcast TV, CTV, online video, and digital display put beautiful Pensacola footage in front of these fans. Teaming with the SEC and ACC networks helped reach 121 million households during afternoon and prime-time football games.

Carvertise - Chicago & Nashville

Chicago - November - December 2022

Nashville - May - June 2023

This campaign combined the power of on-the-ground presence with digital retargeting in Chicago and Nashville. Chicago results: 2 million impressions, Nashville results: 3.9 million impressions.



Winter Visitor Campaign

October 2022 - January 2023

Inviting Snowbirds (Sunshine Seniors), empty nesters, and others to exchange their cold-weather homes for an extended stay here brought more than 3,200 travelers to the area. The multi-tactic campaign used print, digital, cable TV, OTT, and social media advertising to connect with potential travelers in Illinois, Indiana, Michigan, Minnesota, Missouri, Ohio, and Wisconsin.



Sun Belt Basketball Championship Promotion

January - March 2023

In 2023 Pensacola hosted the third year of a five-year commitment to host the Sun Belt Basketball Championship. This seven-day tournament brings in men's and women's teams from the 14 conference schools. The promotion plan combined digital and social advertising with television, radio, outdoor and print advertising to draw out-of-market and local fans to the games. The campaign helped drive a 14.98% increase in attendance and \$2.8 million in visitor spending.

Madden Influencers

February 2023

Five social media influencers visited Pensacola with each promoting a central theme: food, winter travel, outdoor adventure, etc. The campaign delivered 101 posts valued at more than \$88 million in earned media value.



Pensacola Sailing Promotion

March - September 2023

Print and digital advertising promoted Pensacola as a sailing destination, capitalizing on the connection to the American Magic team. The campaign delivered more than 120,000 impressions to sailing enthusiasts.

Diversity-Equity & Inclusion Campaign

March - September 2023

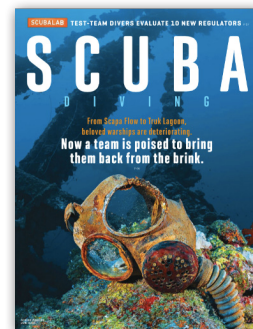
Combining The Way to Beach messaging with contextual targeting to connect with LGBTQ+ and African American travel-intenders generated more than 20k room nights and a 25x ROI.



Scuba Diving Promotion

March - May 2023

Print, digital, and social content marketing in partnership with *Scuba Diving Magazine* highlighted the area's robust diving opportunities and delivered more than 1.2 million impressions.



Tourism Works Campaign

April - July 2023

This education campaign informs and educates Escambia County residents on the value and economic impact tourism has on the local economy. We leveraged local media outlets including 8 billboard locations, 3 local websites, and 6 local radio stations to help deliver the message.

Garden & Gun Seafood Rodeo

June 2023

This integrated promotion included a half-day fishing trip for guests, alongside three local chefs, and was followed by a ticketed dinner for 100 people where the fresh catch was prepared for each guest. The promotion was supported by in-magazine content and ads, as well as email, digital and social media promotion. The event was a sell-out and delivered more than 5.8 million impressions elevating Pensacola's culinary scene.



Share The Sunshine Local Promotion

July - September 2023

Locals were encouraged to act as tourism advocates and ambassadors and "Share the Sunshine" by inviting a friend to win a Pensacola vacation. The campaign leveraged local media outlets including 8 billboard locations, 3 local websites, and 6 local radio stations to help deliver the message. The contest generated over 330 entries.

Early Bird Winter Visitor Campaign

August - September 2023

Historical booking data indicates that our winter visitors begin making their plans much sooner than the traditional beachgoer. Print, digital, cable TV, and OTT helped capture the attention of those cold-climate dwellers early in their planning process.

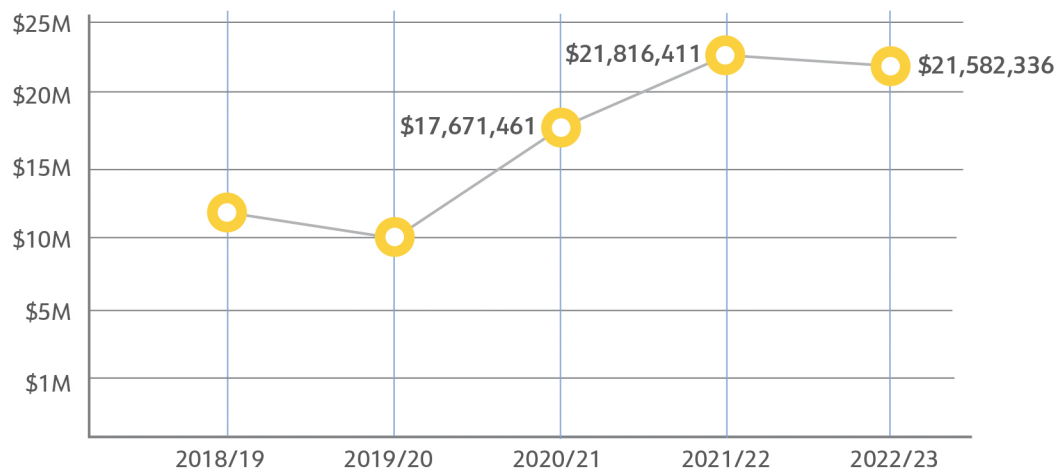


TOURISM DEVELOPMENT TAX (TDT)

Despite the challenge of facing record numbers from the past two years, Escambia County realized TDT collections in FY 2022/2023 that retained that growth with only a minimal drop of 1.1%.

The record increase in FY 2020/2021 was due, in part, to the implementation of the fifth cent of TDT tax. This new one-cent hike began in May 2021.

TDT Collections



- ⬆️ FY21 UP 55.9% over FY20*
- ⬆️ FY22 UP 23.5% over FY21*
- ⬇️ FY23 DOWN 1.1% over FY22*

*Calculating on 4¢

Note: FY 2021 tax rate was 4¢ through April 2021, then 5¢ through the end of FY2021 and beyond. Increase in TDT for FY2022 is calculated with TDT at 5¢.

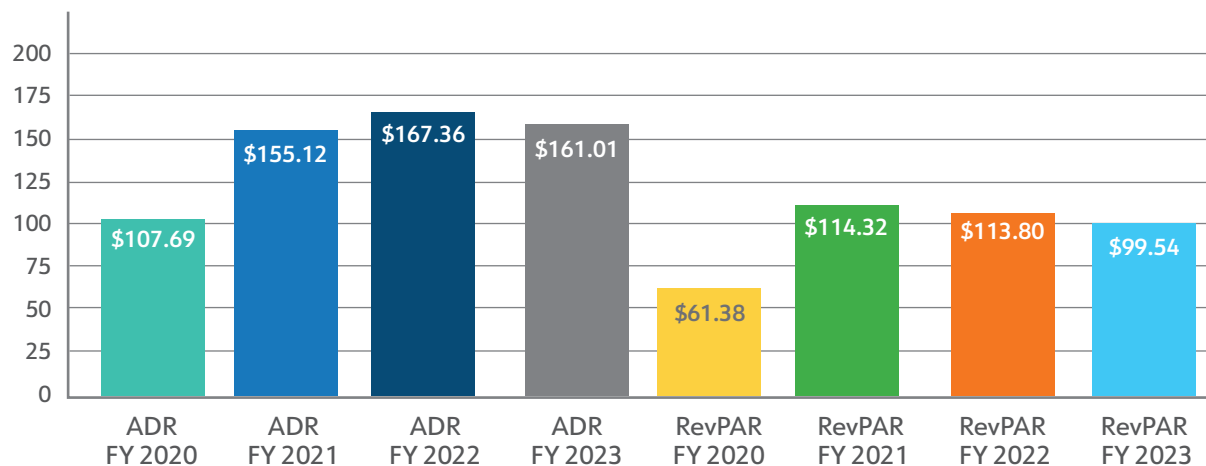
OCCUPANCY, ADR AND REVPAR

Escambia County experienced a decrease in occupancy, yet there was also a 4.9% increase in available units, demonstrating growth.

Lodging occupancy was down 9.1%, and ADR was down 3.8%, resulting in a RevPAR that was down 12.5% for the year.

Occupancy

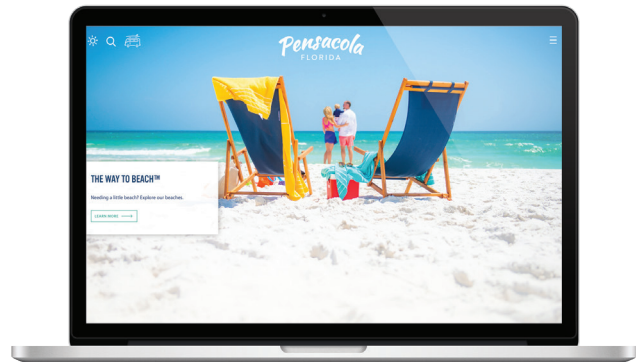
- FY2020 - 57.0%
- FY2021 - 73.7%
- FY2022 - 68.0%
- FY2023 - 61.8%



MARKETING CHANNELS OWNED BY VISIT PENSACOLA

VISITPENSACOLA.COM

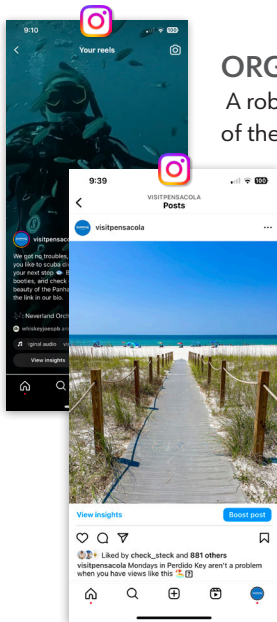
Visit Pensacola enhanced its online presence with the addition of digital displays in the Visitor Information Center lobbies, the deployment of a new Visit Pensacola app, the addition of numerous new landing pages and blog posts.



Website users: 2.2 million – UP 19%

Partner listings accessed: 639,000 – UP 19%

Page views: 5.6 million – UP 21%



ORGANIC SOCIAL MEDIA MARKETING

A robust organic social media marketing program is one of the key elements in Visit Pensacola's strategic marketing program. Over the past year, Visit Pensacola's owned social media channels attributed to 22% of travelers top trip planning sources.

The team leads with an expert mentality strategy focusing its channels on the brand's six core experiences, eight neighborhoods, over 300 partners, seasonality/time of year, events/holidays, core tourism initiatives, and stories and experiences that are unique to the area.

Visit Pensacola is one of the leading destination marketing organizations across Northwest Florida distributing nearly 4,000 pieces of content across 10 social media channels.

In FY2023 22% of visitors used their social media to help plan their trip. 21% of visitors had recently seen, read, or heard any advertising, promotions, or travel stories about the Pensacola area.

Channels:



FY 22/23 Social Media Conversions: 92,149
UP 27.7% over previous year



FY 22/23 New Social Followers: 51,775
UP 217% over previous year



Published 600 pieces of partner content

MARKETING CHANNELS OWNED BY VISIT PENSACOLA



Facebook

47,815 Total Social Conversions
51,725 New Page Likes • 3,380,796 Engagements
79,949,542 Impressions • 193,999 Followers



LinkedIn

615 Conversions • 18,285 Engagements
959 Followers



Pinterest

4,568 Total Social Conversions
Engaged 82,751 • 6,595 Saves



Twitter

1,886 Total Social Conversions • 1,340 New Followers
Total Engagement: 49,019 • 1,200,000 Impressions



YouTube

1,417 Total Followers • 299 New Subscribers



TikTok

585,417 Video Views • 834 New Subscribers
Engaged 10,859



Instagram

4,563 TOTAL SOCIAL
CONVERSIONS
18,716 New Followers
Total Engagement: 544,869

Instagram Stories

1,247 Total Social Conversions
2,042,922 Story Impressions
1,780,000 Story Interactions

Notable achievements:

- Website sessions via social referral: 92,149, up 27.78%
- Contributed social conversions: 60,577, up 14.09%
- Published nearly 6,000 pieces of partner content
- Total platform impressions: 72.9 million
- Total engagements: 3.3 million
- Total net follower growth: 51,725



MARKETING CHANNELS OWNED BY VISIT PENSACOLA

Email Marketing

Visit Pensacola continues to build and strengthen its email marketing programs. Email efforts are directed at one of two audiences - consumers and partners/stakeholders. Those audiences are further segmented by interest and topic for specific initiatives.

In 2023 Visit Pensacola launched a new partner engagement email series, as well as a new quarterly group sales e-newsletter.

Total Emails Sent: 95,000
UP 61% over previous year

CONSUMER AUDIENCE STATISTICS



New sign-ups - 18,615 UP 26.7% over previous year



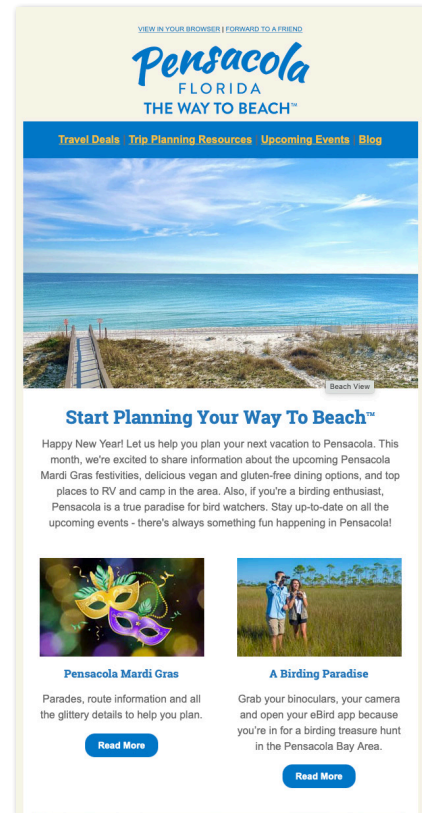
Conversion Rate - 137% DOWN 7% over previous year



Open Rate - 42.4% UP 33% over previous year

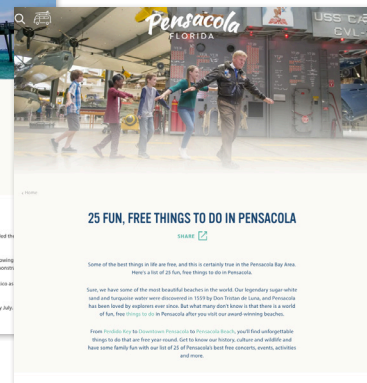
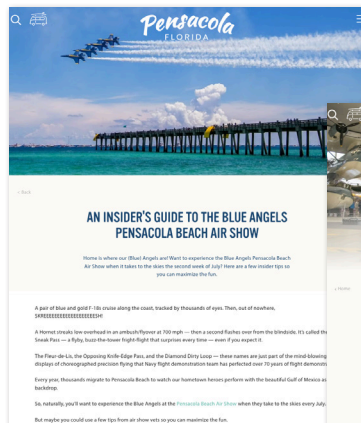


Click-Thru Rate - 2.3% DOWN 17% over previous year



Blogs

Visit Pensacola posted 116 new and refreshed blogs in FY 24 to VisitPensacola.com. The team worked with numerous community members for a local's perspective to share insider tips for the best places to eat, do, stay, and more. The narrative paid off with the blog receiving 506,000 views.



PUBLIC RELATIONS OVERVIEW



PR Objectives:

- Increase overall awareness of Visit Pensacola and Escambia County
- Bring awareness to how Pensacola is a safe, enjoyable travel destination in all segments of travel
- Make announcements on behalf of Visit Pensacola in relation to tourism, growth, adventure travel, family travel, restaurant openings, major events and more
- Garner coverage from regional and national media surrounding tourism to Pensacola and Escambia County
- Explore opportunities to establish regional media interest, especially in drive market and new direct flight cities

PR Tactics:

- Press Materials: Draft pitches, media alerts and press releases for any important news and initiatives
- Media Lists: Update media lists tailored for Visit Pensacola (with regional, national and international outlets, trade publications, in-flight magazines, target market publications)
- Direct Pitches: Draft a variety of pitches showcasing Pensacola to capture media interest, including adventure travel, parks/outdoors, family travel deals, national holidays, local festivals, once-in-a-lifetime opportunities and more
- TV Segments: Book appropriate segments to promote tourism, travel trends, upcoming events, major openings and more in Escambia County
- Desksides and media hostings: Coordinate media desksides for Visit Pensacola during travel and tourism-related conferences. Invite press to visit Pensacola, Perdido Key and Pensacola Beach for hostings when possible
- Profile Pieces: Set up interviews with appropriate spokespersons in preparation for profile stories (i.e. Chefs, travel officials, Darien)
- Events: Assist with conceptualization and coordination of out of market media events to promote Visit Pensacola



Visit Pensacola Public Relations Efforts Garnered OVER 1.9 MILLION IN EARNED MEDIA

18
PRESS
RELEASES

424
MEDIA
PITCHES

24
MEDIA
MISSIONS

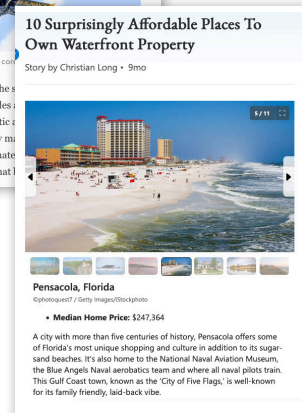
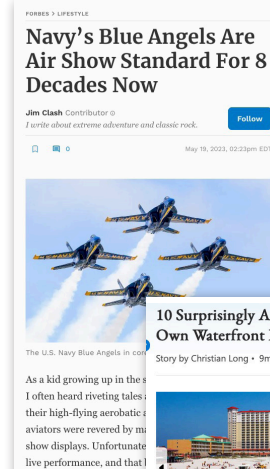
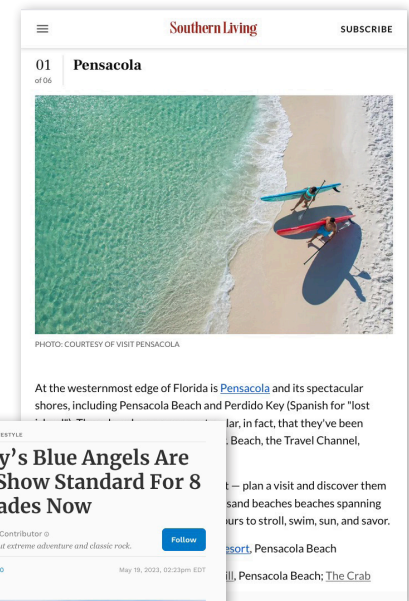
42
HOSTED
PRESS TRIPS

532
MEDIA
ASSISTS

30
FILM
REQUESTS

Top Press Hits

- 10 Surprisingly Affordable Places To Own Waterfront Property – *MSN Travel*, 67 million impressions, media value \$15,444
- 13 Very Best Places To Visit In December In The United States For Holiday Memories – *MSN Travel*, 67 million impressions, media value \$15,444
- Explore The World Of Shark Tourism With These Florida Panhandle Experiences – *Forbes Online*, 22 million impressions, media value \$50,876
- U.S. News Announces 2022-2023 Best Places to Retire Rankings – *U.S. News and World Report*, 15 million impressions, media value \$35,397
- 20 Gorgeous Florida Beaches with Caribbean Vibes – *Southern Living Online*, 2 million impressions, media value \$1,565
- These Small Towns in Florida Have More Charm Than We Can Handle – *Country Living Online*, 3.5 million impressions, \$2,880
- The Most Beautiful White Sand Beaches In Florida – *Southern Living Online*, 2 million impressions, \$1,565
- 10 Surprisingly Affordable Places To Own Waterfront Property – *MSN Money*, 62 million impressions, \$49,598
- U.S. Navy Blue Angels Are an American Standard For Good Reason – *Forbes Online*, 24 million impressions, \$55,317
- 9 of the Friendliest Towns In the Gulf Coast – *World Atlas*, 1.3 million impressions, \$305
- The Best Places in America for Boomers to Retire – *MSN Travel*, 67 million impressions, media value \$15,444



FY22/23 SALES & SERVICE RECAP

SALES AND SERVICES OVERVIEW

The Visit Pensacola Sales and Service team was out in full force in FY 22/23 representing the destination at multiple travel and trade shows. Locally the team focused on partner engagement, educating tourism stakeholders on the many ways to collaborate with Visit Pensacola to boost their business.

Hosted monthly Hospitality Roundtable Luncheons/Experiences



CONFERENCES AND TRADE SHOWS

October 2022 - December 2022

Small Markets Summit
DEMA
World Travel Market

January 2023 - March 2023

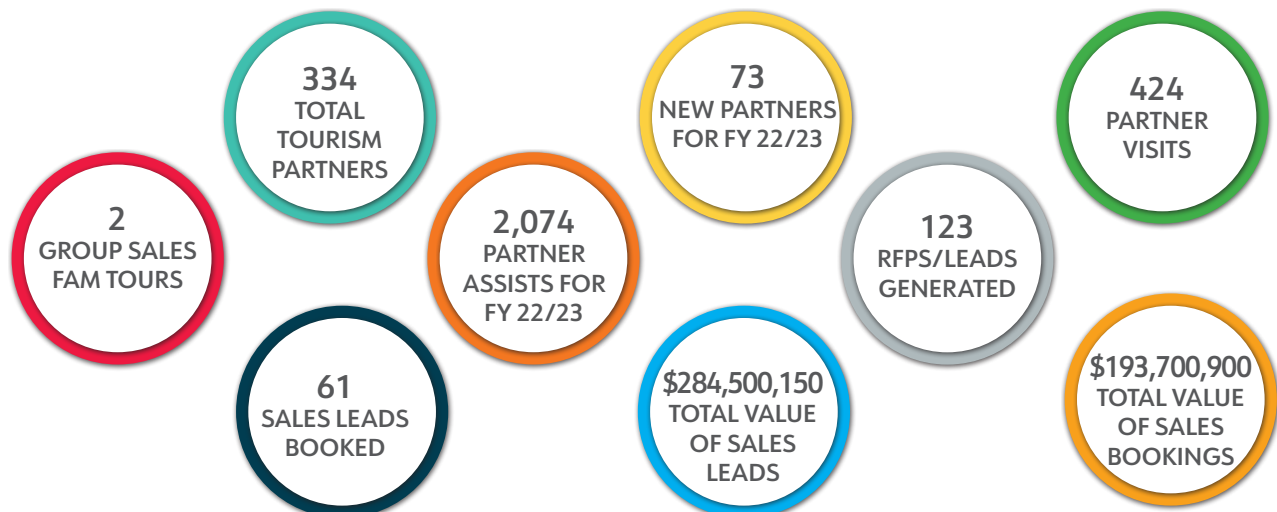
Chicago Travel & Adventure Show
New York Travel & Adventure Show
Florida Encounter
Denver Travel & Adventure Show

April 2023 - June 2023

Dallas Travel & Adventure Show
African American Conference
Connect Financial
Connect City Wide
International Pow Wow
Military Reunions Summit

July 2023 - September 2023

Connect Corporate
Small Markets Summit



Community engagement was a priority for Visit Pensacola in FY 22/23.

Here are a few highlights of our accomplishments:

Holiday Cube Promotion

December 2022

Visit Pensacola's "Holiday Cube" is a four-sided structure placed in Plaza Ferdinand that features four postcard-style photo-op scenes. Visitors and locals are encouraged to snap photos in front of the cube and share their images on social media.



Sun Belt Basketball Championship Fan Fest and Host Bars

March 2023

Visit Pensacola spearheaded organizing the Fan Fest for the 2023 Sun Belt Basketball Championship. The team organized vendor booths, games and entertainment to help draw crowds and drive attendance. Visit Pensacola also recruited four downtown bars to serve as host bars for the event. Each location was decorated in Sun Belt themed colors, displayed promotional materials and played the games on their TV screens.



FY22/23 COMMUNITY ENGAGEMENT RECAP

National Travel & Tourism Week

May 2023

Visit Pensacola celebrates and promotes tourism during this week-long event that includes the following activities:

- Hospitality Heroes Luncheon
- Travel & Tourism Workshop
- Beach Cleanup
- Hospitality Olympics
- Open Houses at each Visitor Center



America's First Settlement Trail Urban Adventure

August 2023

Visit Pensacola spearheaded the creation of the A1S Urban Adventure - a special event with a series of games that involved hunting, solving clues, challenging other participants to "duels", and so much more.

Visit Pensacola participated in the following community events:

- | | | |
|---|--|---|
| <ul style="list-style-type: none">• ACE• EntreCon• Fiesta• Foo Foo Fest• Gallery Night• Juneteenth• Keep Pensacola Beautiful• Leadership Pensacola | <ul style="list-style-type: none">• Northwest Florida Beaches Association• Paddle The Gulf Monthly• Perdido Bay Estuary Cleanup• Pensacola Beach Chamber Meeting• Pensacola Chamber Meetings• Pensacola Sports Events | <ul style="list-style-type: none">• Pensacola Vibes Community Cleanups• Perdido Key Chamber Meetings• POP Mural Project• Scuba Diving Safety Symposium• Sea Grant Advisory Meeting• Service Club Presentations• University of West Florida Events |
|---|--|---|

RESEARCH

Consumer research was a key focus area for Visit Pensacola in FY 22/23 with several research initiatives conducted and completed. Research partner Downs & St. Germain led the following initiatives:

Visitor Insight Surveys

October 2022 - September 2023

In this ongoing research initiative 300 surveys are conducted each month at key locations and events throughout Escambia County.

Emerging Markets Study

August 2023

This study was conducted to establish a baseline for Visit Pensacola's marketing push into emerging markets.

Memphis was selected due to the adequate marketing potential (487,100 potential new visitors) and good market penetration (4%).

Denver was selected due to the great market potential (1.5 million potential new visitors) and adequate market penetration (1%).

Dallas was selected due to visitor tracking data as well as the market penetration/potential analysis have shown the success marketing efforts have had in this market. The market also has 3.4 million potential new visitors and 1% market penetration.



Reports for each research initiative can be found at www.visitpensacola.com/industry/reports/

STRATEGIC PARTNERSHIPS

Northwest Florida Beaches Tourism Council

Escambia County is represented by Visit Pensacola in this eight county regional collaboration. Darien Schaefer serves as the Chair for the Council, Nicole Stacey is Co-Lead on the Brand Team and Kaya Man is the Lead on the Sales Team. In 2023, the Council doubled its investment in Sales and Marketing efforts to promote Northwest Florida Beaches using a brand message of "Adventure Within Reach." The Council is now working with Visit Florida to submit a Triumph Gulf Coast grant to implement in 2024.



Magic Torch PR

Visit Pensacola has partnered with Becky Fairlie-Clarke of Magic Torch PR to provide UK and Ireland based public relations and sales representation with the travel trade industry. In this role, she will serve as Visit Pensacola's representative in the UK and Ireland and will identify and pursue opportunities for FAM trips, sales missions and marketing programs that benefit Visit Pensacola.

Pensacola FLORIDA



Visit Pensacola
1401 E. Gregory Street • Pensacola, FL 32502
850-434-1234 • visitpensacola.com