







TABLE OFCONTENTS

Letter from Visit Pensacola President	3	
Executive Summary	4	
Three Phased Approach	5	
Mission and Vision	6	
Economic Impact	7	
Facts About Our Visitors	9	
Travel Trends and Growth Opportunities		
Destination Strengths	12	
Strategic Areas of Focus	14	
Next Steps	20	





DEAR COMMUNITY MEMBERS,

On behalf of Visit Pensacola I am pleased to share this ReVISIT Pensacola Strategic Plan outlining insights and initiatives designed to guide our strategic decision-making over the coming years as we continue to market Pensacola, Pensacola Beach, and Perdido Key as a premier destination to visit and live.

The framework of this plan was first developed in 2015 with the Destination 2020 report. That report provided vital insights that helped shape our marketing efforts in the years leading up to 2020, resulting in year-over-year improvements and an increasingly positive perception of Escambia County as a tourism destination.

The onset of the COVID-19 pandemic demanded that we place our long-term planning on hold and address the immediate needs of our constituents. Having adapted to challenges of that unprecedented slowdown in the tourism industry, we recognized the need to reengage with our community and set a vision for the future.

To ensure that the community had a chance to offer input on the path forward, we connected with community stakeholders and the public through a series of focus groups and surveys conducted by the Studer Community Institute. Downs & St. Germain Research conducted additional market and customer research.

The resulting insights have reinforced many of the key areas of focus and strategic success factors that have long been at the core of achieving our vision that tourism be a powerful economic engine for our community. We know that our community is rich with natural and cultural assets that visitors are drawn to experience, and that we can offer a broader range of experiences to a more diverse set of visitors than our competitors can match.

Like the Destination 2020 plan, this plan has revealed that there are strengths we can build upon, weaknesses that we will need to address and new opportunities worth exploring. Our hope is that this plan will serve as a guidebook and resource that we can return to as we chart the path forward over the coming years. With this plan in hand and Pensacola behind us, we know the future is bright.

Darien Schaefer President & CEO Visit Pensacola

BOARD OF DIRECTORS

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EXECUTIVE SUMMARY

IN 2015, VISIT PENSACOLA LED A COMMUNITY INITIATIVE IN IDENTIFYING OPPORTUNITIES TO ENHANCE OUR COMMUNITY AND ASSETS TO DEVELOP OUR POTENTIAL AS A GREAT PLACE TO VISIT AND LIVE.

Strategic areas of focus emerged as key success factors for our community to rev-up tourism as an economic engine. These areas defined the framework for the five-year plan known as Destination 2020.

VISIT PENSACOLA BEGAN WORK ON THE TACTICS THAT HAD EMERGED IN THE VARIOUS FOCUS AREAS:

Increase the Economic Impact of Visitors Goal: Attract diverse visitors across all seasons through continued implementation of visitor acquisition and retention strategies.

Asset and Product Development Goal: Develop destination assets that attract visitors while contributing to the quality of life of community residents.

Infrastructure and Community Development Goal: Collaborate with governmental entities and others to improve infrastructure and natural assets essential for the development of tourism and quality of life for community residents.

Community Collaboration, Connections and Partnerships Goal: Foster a collective community esprit de corps among organizations, government entities and community members.

Evolving Role of Visit Pensacola Goal: Become a multi-faceted destination management organization (DMO). Lead. Collaborate. Connect. Communicate.



ADAPTING AND REACTING

Unfortunately, when the worldwide pandemic Covid19 hit and the tourist industry came to a grinding halt, Visit Pensacola was forced to put the long range plan on hold and focus on the immediate needs of their constituents.

In 2022, as the area began to emerge from the Pandemic, Visit Pensacola needed an updated plan that examined the new and most pressing needs of our community to grow a better Pensacola through tourism.

To gather data and answer this question, Visit Pensacola engaged various agencies including Studer Community Institute and Downs and St. Germain to conduct research and get a pulse from those involved and invested in tourism in Escambia County.

The goal? To ReVISIT Destination 2020, share insights, generate fresh ideas, and collaborate on understanding the top priorities to power the economic engine of tourism in 2023 and beyond while, simultaneously, making the area an even better place to live.

THREE PHASE APPROACH





A THREE PHASE APPROACH WAS ADOPTED AND DATA WAS GATHERED FROM MULTIPLE SOURCES.

STAGE 1

Over the course of two days, three stakeholder focus groups took place with a wide and varied cross section of interested parties. An online public survey was also conducted to gather insights of those not able to participate in the focus groups.

STAGE 2

Market research and customer preferences research conducted by Downs and St. Germain Research.

STAGE 3

A final stakeholder focus group was held to review all the data that had been gathered, with the goal of identifying the top priorities for Visit Pensacola to focus on in 2023 and beyond.

MISSION AND VISION





MISSION – Lead. Connect. Collaborate. Communicate. Visit Pensacola supports our vision of tourism by serving as the central agency responsible for building tourism as an economic engine for our community.

In this role, the organization functions to lead efforts directly related to the attraction and retention of tourists to our community. The organization collaborates with other organizations with niche interests related to this mission.

In addition, Visit Pensacola serves to connect others to various entities that impact development and infrastructure vital to supporting our vision, and facilitates communication among various groups to create an atmosphere of trust, engagement and pride.



VISION – Tourism is a vital, highly valued and strongly supported economic engine for our community.

Commitment to this vision has produced a better quality of life for residents, a preferred destination for visitors and measurable economic results.

ECONOMIC IMPACT TOURISM'S IMPACT ON ESCAMBIA COUNTY ECONOMY



visitor spending in fy2021 generated a total economic impact of \$\$1,935,185,800 in the pensacola area \$\$\$ An increase of +31.3% FROM Fy2020

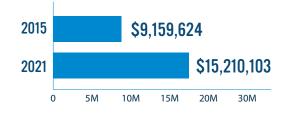
HOUSEHOLD SAVINGS

VISITORS TO THE PENSACOLA AREA SAVE LOCAL RESIDENTS \$630 IN LOCAL TAXES EVERY YEAR

TOURISM-RELATED JOBS

2015	20,000
2021	22,006

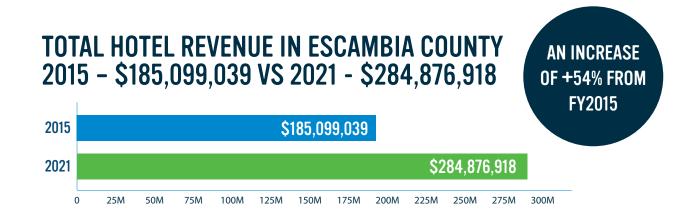
TOURISM DEVELOPMENT TAX COLLECTIONS FISCAL YEAR 2015 VS. 2021 +49%



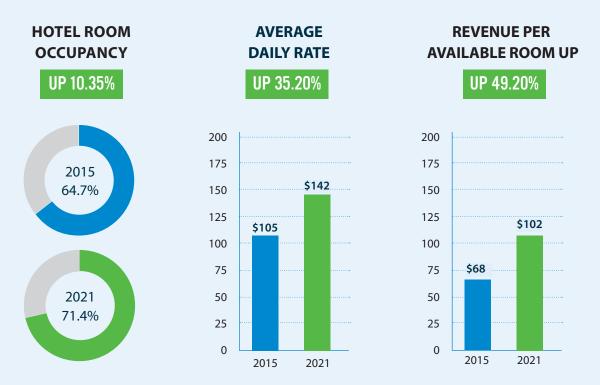
Based on 4 percent collection per dollar comparison. Escambia County began collecting Tourism Development Tax at 5 cents per dollar in April of 2021.

total tdt collections in 2021 were \$17,671,461

ECONOMIC IMPACT TOURISM'S IMPACT ON ESCAMBIA COUNTY ECONOMY



CALENDAR YEAR 2015 VS. 2021



Based on Smith Travel Research Escambia County Report – December 2015 and December 2021. Does not include Vacation Rentals, Condos or RV Parks

FACTS ABOUT OUR VISITORS





2014 VISITORS TO ESCAMBIA COUNTY

Average Age	41
Average Household Income	\$81,768
Advance Planning	46 Days
Average Party Size	
Average Length of Lodging Stay	7 Days
Average Spend Per Day	\$155
Average Total Spend	\$1,127
First Time Visitors	40%

VISITOR PROFILE & BEHAVIOR

Drive	77%
Fly	23%
Travel with Children	24%
Stay in Paid Accommodations	66%
Will Recommend Pensacola	98%
Plan To Return	93%

2021 VISITORS TO ESCAMBIA COUNTY

Average Age	42
Average Household Income	\$90,000
Advance Planning	65 Days
Average Party Size	3
Average Length of Lodging Stay	5 Days
Average Spend Per Day	\$337
Average Total Spend	\$1,538
First Time Visitors	

VISITOR PROFILE & BEHAVIOR

83%
16 %
33%
64%
94%
98%

Source: Majority Opinion Research

Source: Downs & St. Germain Research

TRAVEL TRENDS AND GROWTH OPPORTUNITIES



👂 BEACH, BEACH, BEACH

Previous visitors, potential visitors, meeting planners, you name it, all see the beach and the promise of relaxation as the most important and influential drivers for them to visit. This message is consistent across the various studies we have conducted over the past few years.

RISING COSTS/BUDGET CHANGES

- With rising travel costs, gas prices, and inflation the "Revenge traveler" trend is waning
- 1 in 3 American travelers said that high travel prices have kept them from traveling in the recent past (Destination Analysts)
- Yet, 3 in 5 say travel is a high budget priority for them (Destination Analysts)
- They also say they will reduce the amount they spend on retail purchases, entertainment, and restaurants (Longwoods)
- Likewise, 1 in 3 travelers said they will reduce the number or trips they take or choose a destination closer to home due to rising gas prices (Longwoods)

IMPACTFUL TRAVEL

- The traveler today is different from the pre-pandemic traveler
- Travelers are pursuing experiences that are more authentic and meaningful (Exploding Topics)
- Over 3 in 5 Americans say they want money they spend while traveling to go back into the local community and they want authentic experiences that represent the local culture (TravelAge West Representation).
- 96% of travelers responded that it's important their tourism dollars make a positive impact on the communities they visit (PureWow)
- Representation and equality matters for travelers, "While this is true at all levels, it is especially so amongst our storytellers, guides, local specialists and travel directors — the faces of travel in this country." (TravelAge West)

TRAVEL TRENDS AND GROWTH OPPORTUNITIES



VACATION EXPERIENCES

- The pandemic has intensified the importance of family travel as people have not been able to see family over long periods of time
- Travelers have gained a heightened sense of their personal value and are prioritizing family time
- Outdoor spaces and the beach were prime spaces to vacation during the pandemic and will continue to be sought after experiences, yet as restrictions lessen, and urban cities are revitalized, people are setting their sights on city vacations

BUSINESS TRAVEL

- Corporate travel remains below 50% of pre-pandemic spend (Deloitte)
- Business travel is at least 2 years from reaching pre-pandemic spend (Deloitte)
- Remote workers and digital nomads can incorporate more leisure time into their lives by being location-independent and put travel as a high priority (Exploding Topics)
- Business traveler enthusiasm is lagging: 75% of business travelers in our survey are not excited about or are indifferent to traveling again for work (PWC)

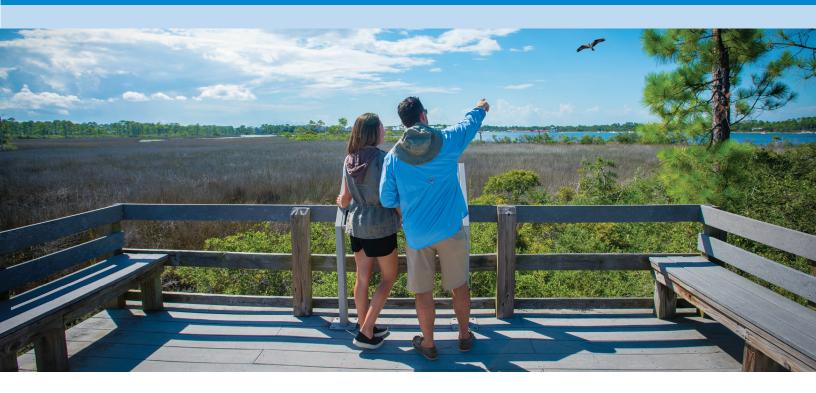
🖓 LABOR SHORTAGE

- Labor crunch still an issue and resulting in many hotels cutting services and amenities
- Hotel workforce predicted to be 93% of pre-pandemic by the end of 2022
- More than half of U.S. hospitality workers said they wouldn't go back to their jobs, while over a third said they aren't even considering reentering the industry. (Forbes)
- Yet, over 3 in 5 visitors are now more sympathetic to frontline/ hospitality staff (Destination Analysts)





DESTINATION STRENGTHS



VIBRANCY AND A GREAT QUALITY OF LIFE GO HAND IN HAND WITH GROWING TOURISM-VISITORS AND RESIDENTS WANT THE SAME THING.

First and foremost, it emerged from the focus groups that our community is a great place to live. Increasingly there are more people, more money, more jobs, more opportunity. These are things talent looks for and investment follows talent. People who visit often return as permanent residents. Lots of people move back from the military.

The beauty of our natural environment brings people here from all corners of the world to visit and to live. Our beaches are amazing and continue to be our biggest draw. Even better news, we have lots of other things to do. Pensacola is a thriving city and continues to feel authentic with lots of activities, shopping, dining, etc. Our Southern Hospitality makes visitors feel welcome, like they are part of the community.

The quality and frequency of our festivals and events also draw people to Pensacola. We've been able to attract sports tournaments and conventions that bring in outside spectators and attendees. We also host largescale, annual community festivals that attract out of town visitors year after year. Our gallery nights and other downtown events are hugely popular.

- We're also known for our high-quality visual and performing arts scene. Our museums encourage visitors to explore Pensacola's rich, diverse history.
- Downtown Pensacola has become a huge success and a destination to itself. Visitors are drawn to the culture, dining, shopping and nightlife and festivals that can be found in our historic city center.
- Pensacola's food and beverage scene has seen tremendous growth with new restaurants, breweries and bars adding to the diversity of our already rich culinary scene.
- Pensacola is a very accessible destination, welcoming visitors traveling by car along the interstate highways, by air at the Pensacola International Airport and even by boat at our deep-water Port of Pensacola.

DESTINATION STRENGTHS







- Pensacola's claim as home to the U.S. Navy Blue Angels is a major draw for visitors who relish the opportunity to see practice shows and attend our two air shows each year.
- The National Naval Aviation museum offers a world-class, hands-on experience that inspires the young and the young-at-heart. Access to the museum does continue to be a challenge as of the printing of this report.
- Pensacola's economy is diverse. While tourism is a strong economic engine, it's complemented by equally strong medical, military, higher-education and corporate sectors.
- Pensacola rich history has always been an attraction for visitors and a point of differentiation from our competitors. Enhancements to our museums and the addition of the America's First Settlement Trail give visitors more incentive and opportunity to explore our history.
- Pensacola's sports scene also stands apart. For our size, we boast two professional sports franchises: the Pensacola Blue Wahoos and the Pensacola Ice Flyers.
- Pensacola also hosts college-level championships including the Sun Belt Conference's men's and women's basketball March Madness tournaments in the spring and the SEC Women's Soccer Championship in the fall. Pensacola's collegiate awareness was even further pronounced recently when the University of West Florida football team won the NCAA Division II title and made college football history.
- Beyond that, Pensacola is home to one of America's most renowned short-track race car events – the Snowball Derby at Five Flags Speedway.
- American Magic, the U.S. Challenger for the 37th America's Cup (the highest prize in sailing and the oldest trophy in international sports) has chosen Pensacola as their new home and training center, bringing international attention and recognition to the Pensacola Bay Area as a premiere sailing venue in the United States.

The following areas of focus emerged as key success factors for our community to grow tourism as an economic engine. These areas define the framework for the short-term future.

The following tactics were identified in the Destination 2020 Strategic Plan and new thoughts and ideas have been added reflecting the changes that have taken place in the industry and our market. During the next phase of this process these tactics will be further vetted and prioritized based on additional research, community input and funding decisions.

To ensure consistent follow up on action steps, the Visit Pensacola Board of Directors will form committees to regularly review the progress and suggest actions to accomplish each objective.

Special Note: Growing Pensacola's tourism industry requires community support and in some cases governmental action, so success will require collaboration and cooperation of everyone.

1. INCREASE THE ECONOMIC IMPACT OF VISITORS

Goal: Attract diverse visitors across all seasons through continued implementation of visitor acquisition and retention strategies.

OBJECTIVES

1.1 BUILD YEAR-ROUND VISITATION THROUGH BRANDING AND MARKETING

IDENTIFIED TACTICS

- · Communicate reasons to visit here year-round, not just the summer
- Cross-market the whole experience: beach, history, culture, local experiences (dining and entertainment) as
 one package
- · Cross-market all the communities: Pensacola, Perdido Key, Pensacola Beach promoting unique qualities of each area
- Continue to grow tourism in winter months by targeting the "winter visitor" demographic, as well as targeting remote workers that reside in cold weather markets
- Inform travel consumers about the truly unique aspects that set Pensacola apart from other beach destinations: natural environment, history and multi-cultural roots
- Continue to support the direct flight markets of the Pensacola International Airport. Promote the ease of travel to
 Pensacola from key direct flight markets.
- Proactively manage the destination's reputation through public relations, rankings and other third parties who influence the travel consumer
- Put more emphasis on marketing our natural resources (e.g. ecotourism)
- · Capitalize on the arrival of the American Magic and a new market of year round sailing enthusiasts



1.2 DIVERSIFY VISITOR SEGMENTS

IDENTIFIED TACTICS

- Prepare for the future by using targeted marketing to attract more millennials
- Take advantage of current trends and opportunities by marketing to attract diverse audiences across all generations and ethnic groups
- Attract more groups associated with meetings, reunions, conferences, etc.
- Maintain existing focus on attracting families
- We have an opportunity to bring more diverse groups here (ex. Latino/Hispanic and LGBTQ), showcasing the area as an inclusive and welcoming community.

1.3 MAKE IT EASY FOR PEOPLE TO CONNECT WITH US

IDENTIFIED TACTICS

- Maintain and continue to update state-of-the-art technology (mobile and website) to create connections with potential visitors
- Bringing back the Ambassador program, adding informational kiosks in strategic areas. Assessing the needs of those with disabilities and what accessibility needs improving.
- · Maintain and enhance the experience for visitors at our Pensacola and Perdido Key visitor information centers.
- Install information kiosks at visitor information kiosks at the Pensacola visitor information center, the Pensacola International Airport and in Downtown Pensacola to provide a 24/7 source for information.
- Maintain and update the Visit Pensacola app, providing on on-the-go informational resource for both visitors and locals.

1.4 WOW THE VISITOR WITH THE EXPERIENCE THEY HAVE IN OUR COMMUNITY

Lean in to promote Pensacola, Pensacola Beach and Perdido Key

IDENTIFIED TACTICS

- · Make the experience of visiting our area very positive through excellent customer service
- Tell our story to our local residents so they can become our best advocates
- Make it easy for people to find attractions and experiences when they are in-market through the Visit Pensacola App, kiosks, visitor centers, web sites, texts, etc.
- Promote local events and activities via website and app so visitors can enjoy local activities during their visit.
- · Conduct on-going consumer research to more effectively design messaging strategies to address target markets
- · Perform on-going research studies to tell us what consumers want and what they find most appealing about our area
- Apply budget resources to target high-value niche markets
- Attract more groups associated with meetings, reunions, and conferences
- Emphasize Pensacola as a destination for winter visitors
- · Focus on all the "Ways to Beach" in Pensacola sharing the diversity of experiences beyond the beach that can be enjoyed here

2. ASSET AND PRODUCT DEVELOPMENT

Goal: Develop destination assets that attract visitors while contributing to the quality of life of community residents.

OBJECTIVES

2.1 CREATE PUBLIC GATHERING SPACES THAT INCREASE MARKETABILITY OF OUR COMMUNITIES

IDENTIFIED TACTICS

- Build a new convention, conference or multi-use indoor public center. Pensacola Bay Center needs a major overall or replacing with a convention center with more meeting spaces and a full-service hotel attached or nearby.
- Advocate for an indoor/outdoor sports facility to increase sports tourism in our area. Suggested sports tourism growth in baseball, soccer, basketball, volleyball and cheerleading, all available at one complex. We have built a lot of momentum with the Sun Belt Conference and the SEC Soccer Tournament.
- · Advocate for greater development and utilization of public spaces for events and festivals
- · We need safer more bike-ability and walk ability,
- Mass transit is a hot button issues with ideas centering on expanded trolley system and hours. Transportation options that encompass Perdido and airport to downtown are needed.
- Capitalize on the American Magic Sailing Center which is being established by the American Magic sailing team, who has future plans to bring more sailing-related opportunities here.

Other insights/suggestions on transportation:

- Ferry is currently more of an experience than transportation.
- Add boat taxi from Pensacola Beach to downtown for expediency.
- Airport: extend runway so they can expand flight schedule.
- Connector to I-10 to 65
- · Continue growing Downtown Pensacola as a vibrant, yet quaint, urban core and a must-see destination



2.2 DEVELOPMENT OF RESTAURANTS, HOTELS AND SHOPPING

IDENTIFIED TACTICS

- Increase diversity of restaurant, food and culinary products. Brewery, cocktail and culinary scene is becoming something that attracts tourist and we have plenty of bars however we need more restaurants and culinary diversity so we could be seen as "Foodie Friendly" with specific experiences that attract visitors. This could particularly help in the off season.
- Increase hotel inventory, adding more luxury, boutique or 5-star properties.
- Encourage development of new shopping experiences across the destination, with the future possibility of promoting distinct shopping districts.

2.3 DEVELOP DIVERSITY IN EXPERIENCES – CREATING ADDITIONAL EXPERIENCES THAT ADDRESS DIVERSE GROUPS

IDENTIFIED TACTICS

- Further develop ecotourism experiences and attractions such as trails, tours and outfitter businesses that help visitors experience nature responsibly.
- Embrace our "America's First Settlement" status by continuing to develop multi-cultural heritage, historic and agricultural experience and attractions, capitalizing on the new "America's First Settlement Trail".
- Provide support in whatever ways possible to re-open access to the National Naval Aviation Museum, Pensacola Lighthouse and Ft. Barrancas.
- Promote Blue Angel experiences.
- Further development of special interest tourism such as sporting events, festivals and music, etc.
- Enhance the destinations burgeoning music scene and nightlife
- Attract large-scale, world-class convention, entertainment and sporting events.
- Create more shareable moments. Top tourist cities have iconic photo opportunities. What can we do to create more of these such as murals, sculptures and so on.
- Promote activities related to American Magic and sailing in Pensacola
- · Work with golfing community to explore golf vacations in our area

3. INFRASTRUCTURE AND COMMUNITY DEVELOPMENT

Goal: Collaborate with governmental entities and others to improve infrastructure and natural assets essential for the development of tourism and quality of life for community residents

OBJECTIVES

3.1 CREATE CONNECTIONS AND ACCESSIBILITY THROUGH EXPANDED MODES OF TRANSPORTATION

IDENTIFIED TACTICS

- · Improved access through air travel: flights and connections
- Improved access to Pensacola Beach due to new 3 mile bridge and beach access changes.
- Expanded mass transit options: public and private sources (bus, trolley, ferry, taxi, Uber, etc.)

3.2 ADVOCATE FOR CONSTRUCTION THAT SUPPORTS ACCESS AND CONNECTIVITY

IDENTIFIED TACTICS

- · Support road and highway development to improve access to different areas of the community
- Advocate for walkable/bike-able communities
- Support increased handicapped accessibility throughout our communities

3.3 ADVOCATE FOR DEVELOPMENT THAT IS HARMONIOUS WITH THE COMMUNITY AND THE ENVIRONMENT

IDENTIFIED TACTICS

- Protect our natural assets through environmental stewardship: policies, regulations, attitudes, etc.
- · Support traditional economic development efforts: jobs, improved wages, attract new business
- · Advocate for development of downtown waterfront as walkable boardwalk area
- Encourage improved signage/wayfinding and community curb appeal/beautification throughout the community
- · Improve first impressions of our community via airport experience and other points of entry



4. COMMUNITY COLLABORATION, CONNECTIONS AND PARTNERSHIPS

Goal: Foster a collective community esprit de corps among organizations, government entities and community members

OBJECTIVES

4.1 Create structures and processes to improve communications between groups, residents and government officials. Develop a formal communications plan to communicate to each group in a meaningful, efficient way.

4.2 Work together across silos to ensure highest and best use of funding in order to grow the number and quality of visitors to our community

4.3 Enhance collaboration and partnerships with area organizations

5. EVOLVING ROLE OF VISIT PENSACOLA

Goal: Become a multi-faceted Destination Management Organization (DMO). **Lead. Collaborate. Connect. Communicate**

Ensure that Visit Pensacola has a seat at the table and gives input on how the City and County can be strategic when looking at infrastructure needs to ensure that they meet the needs of locals and help attract tourists. Areas such as connectivity between downtown and the beach, park and ride areas with safe parking, free parking after 5pm, the value of our airport with customs here now. The waterfront is something we need to treasure for locals and tourists alike. Public restrooms and kiosks to fill water bottles would be helpful. Visit Pensacola could be a convener to help connection and collaboration between different entities. Re-engaging and restructuring the Hospitality Round Table is a suggestion. Concerns were raised about turnover in the hospitality industry and new workers not being knowledgeable therefore implementing hospitality orientation and training days presented by Visit Pensacola was aired.

OBJECTIVES

5.1 Analyze and adjust, if needed, the governance, funding and organizational structure in alignment with industry best practices and community standards

5.2 Continue to effectively manage the evolution of the new marketplace - moving from broadcast of information to stakeholder engagement. Educate the stakeholders on the use of new marketing tactics.

5.3 Promote to Locals how to be a "Tourist in your own City." This has the dual effect of locals getting to know more about the area and what it has to offer so they can brag to friends out of the area and get them to visit, as well as informing locals more about what Visit Pensacola actually does.

5.4 Educate the public on the value of tourism.

NEXT STEPS/NOTES

NEXT STEPS/NOTES





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