



FY2021 ANNUAL REPORT

Florida's Historic Coast
www.FloridasHistoricCoast.com

photo: Rhonda Lovett; St. Augustine Beach



ST. AUGUSTINE
PONTE VEDRA
FLORIDA'S HISTORIC COAST®





FY2021 Annual Report

- 03** Message from our President & CEO
- 04** Importance of Tourism
- 05** Board of Directors/Committees/Staff
- 06** Lodging Performance
- 09** Tourism Development Tax Collections
- 10** VCB Operating Budget
- 12** Golf Tourism ROI
- 13** In-Kind Contributions
- 14** Brand Research
- 15** Paid Advertising
- 19** Promotions & Strategic Alliances
- 20** Website/eCRM
- 21** Communications, Public Relations & Social Media
- 23** Sales
- 24** Co-Operative Advertising & Special Events
- 25** Local Industry Programs
- 26** Tourism Development

Message from the **President & CEO**



Fiscal year 2021 was a year of recovery from COVID-19's devastating impacts on the tourism industry. Thanks to aggressive actions and careful monitoring of traveler sentiments by the St. Augustine, Ponte Vedra & The Beaches Visitors and Convention Bureau (VCB), combined with suppressed competition from outside of Florida, Florida's Historic Coast® set new records for lodging performance and Tourism Development Tax (TDT) collections.

Starting in March of 2021, lodging performance exceeded the previous records set in 2019 and carried on those levels to the end of the year. As we observed in 2020, the VCB could not have driven this demand without the contribution of St. Johns County reserve funds provided by the St. Johns County Board of County Commissioners in late spring of 2020. Those funds allowed the team to monitor travelers' sentiments, then modify and push out messaging particularly relevant to travelers in the last quarter of FY2020 through FY2021. The VCB also provided essential input to stakeholders on what types of safety precautions travelers wanted to see in their businesses.

This year's Annual Report has a new format and is much more concise than in past years. Fewer words and more engaging infographics will, we hope, help stakeholders, Tourism Development Council members, elected officials, and interested residents get more out of this FY2021 Annual Report.

The VCB team is at your service; feel free to call with questions or comments.

Sincerely,

A handwritten signature in black ink, appearing to read "Dick Goldman".

Richard Goldman
President & CEO

St. Augustine, Ponte Vedra & The Beaches
Visitors and Convention Bureau

Importance of **Tourism**

Tourism is one of the world's largest industries, employing millions worldwide. The United States Travel Association (USTA) estimates domestic and international leisure and business travelers generated \$1.8 trillion in economic impact in 2019, and supported 15.8 million jobs.

Tourism, the largest industry in Florida, has long been a major driver of quality of life and economic opportunity. A 2019 study for VISIT FLORIDA® by Rockport Analytics revealed that domestic and international travel accounted for a direct economic contribution of \$96.5 billion annually and supported 1.6 million jobs.

The decline in travel due to COVID-19 devastated our economy and American jobs. The \$500 billion loss in travel spending cost the U.S. \$1.1 trillion in economic output. While the pandemic has had a significant impact on U.S. tourism, Florida's Historic Coast has rebounded and is positioned for strong growth, both short-term and long-term.

How does tourism benefit **St. Johns County**?

The latest Tourism Development Council Visitor Profile reflected \$1.1 billion in annual visitor spending in St. Johns County Tourism. This visitor spending delivered a \$2.4 billion direct economic impact which supported 29,000 jobs representing \$844.5 million in direct tourism payrolls throughout our local community.

Tourism impacts the local community in other ways. It provides the largest number of private sector jobs in St. Johns County. Those employees use their wages to purchase goods and services, including housing, transportation, food, clothing, healthcare, and entertainment. The money invested into our local economy by tourists circulates throughout our economy several times over, providing an ongoing economic impact which would disappear entirely without tourism. Tourists also pay taxes. Transaction taxes collected from tourists include sales tax, fuel tax, and accommodations tax.

TRAVEL

Direct spending by resident and international travelers in the United States averaged:

\$3.1 billion a day

\$128.6 million an hour

\$2.1 million a minute

\$35,700 a second

Travel Creates Jobs.

One in every **10** American jobs is supported by travel.*

*U.S. Travel Association

BOARD OF DIRECTORS

COMMITTEES AND STAFF

EXECUTIVE COMMITTEE OFFICERS

Chairman

Virginia Whetstone
Whetstone Chocolates

Vice Chairman

Tom Dolan
Meehan's Irish Pub & Seafood House

Treasurer

Craig Schoninger
Ponte Vedra Resorts

Secretary

Kimberly Wilson
Casa Monica Resort & Spa

Past Chairman

Samantha Palmer
Flagler's Legacy Tours

BOARD MEMBERS

Tom Jankowski
Fairfield Inn & Suites

Jason Kern
Embassy Suites by Hilton St. Augustine
Beach Oceanfront Resort

Philip McDaniel
St. Augustine & City Gate Distilleries

Cindy Stavelly
St. Augustine Pirate & Treasure
Museum/Colonial Quarter

GOVERNMENT LIAISONS & EX-OFFICIOS

Commissioner Henry Dean
St. Johns County Board of
County Commissioners

Commissioner Dylan Rumrell
St. Augustine Beach City Commission

GOVERNMENT LIAISONS & EX-OFFICIOS (con'd)

Melissa Wissel
City of St. Augustine Commission

Isabelle Renault
St. Johns County Chamber
of Commerce

Richard Goldman
St. Johns County VCB

VCB COMMITTEES

Conference Sales Committee

Joni Barkley
Casa Monica Resort & Spa

Christian Joransen
World Golf Villages Renaissance
St. Augustine Resort

Michelle Kuziola
Courtyard Marriott I-95
& Fairfield Inn & Suites

Kerry Mitruska
Hammock Beach Resort

Jennifer Moore
Guy Harvey Resort

Chris Pranis
Embassy Suites St. Augustine
Beach Resort

Chris Quinlan
Hilton St. Augustine Historic Bayfront

Craig Schoninger
Ponte Vedra Inn & Club
and The Lodge & Club

Aaron Weegar
Sawgrass Marriott Golf Resort & Spa

Leisure Sales Committee

Michelle Kuziola
Courtyard Marriott I-95
& Fairfield Inn & Suites

Jennifer Jenkins
Hyatt Place

Shannon Lake
Beacher's Lodge Oceanfront Suites

Diane Lane
Ancient City Tours

Melissa Mezick
Old Town Trolleys

Samantha O'Boyle
The Sebastian Hotel, a member
of Radisson Individuals

Laura Pazzini
Hammock Beach Resort

Lane Schaffer
DoubleTree by Hilton St. Augustine
Historic District

Cindy Stavelly
St. Augustine Pirate & Treasure Museum

Advertising Committee

Tom Dolan
Meehan's Irish Pub & Seafood House

Samantha Palmer
Flagler's Legacy Tours

Craig Schoninger
Ponte Vedra Resorts

Virginia Whetstone
Whetstone Chocolates

Kimberly Wilson
Casa Monica Resort & Spa

VCB STAFF

Richard Goldman
President/CEO

Lisa Cliburn
Office Manager

Susan Phillips
Director of Tourism Promotion
& Strategic Alliances

Barbara Golden
Communications Manager

Erin Masters
Special Events &
Database Manager

Benjamin Nguyen
Stakeholder Relations &
Database Manager

Stacey Sather
Creative & Social Media Manager

William McBroom
Director of Conference Sales

Evelyn Lopez-Kelley
Director of Leisure Sales

Jaya Dillard
Sales & Services Manager

Heather Williams
Marketing Coordinator

**Independent Staff for St. Augustine
Beach Visitor Center Remunerated
directly by TDC**

Anna Helfinstine
Visitor Center Staff

William McDowell
Visitor Center Staff

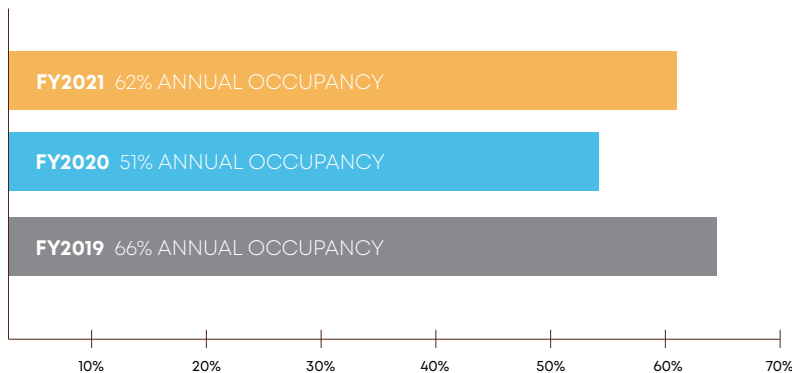
LODGING PERFORMANCE

FY2021 METRICS

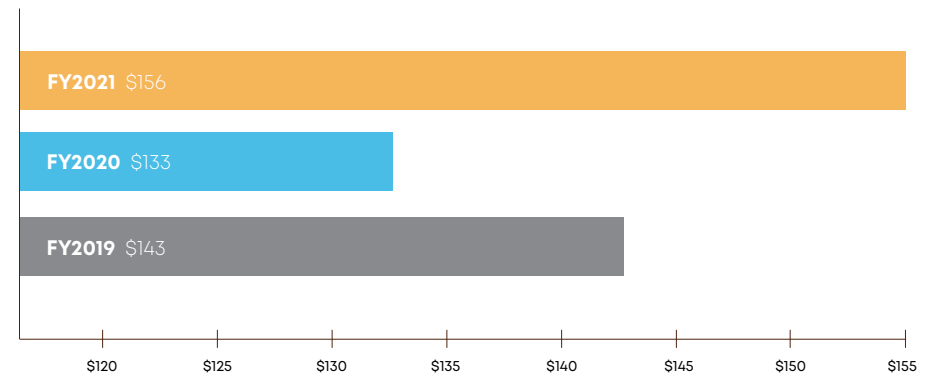


**For nearly every metric,
FY2021 performance exceeded
both FY2020 and FY2019 performance!**

ANNUAL OCCUPANCY TRADITIONAL LODGING



ANNUAL ADR TRADITIONAL LODGING



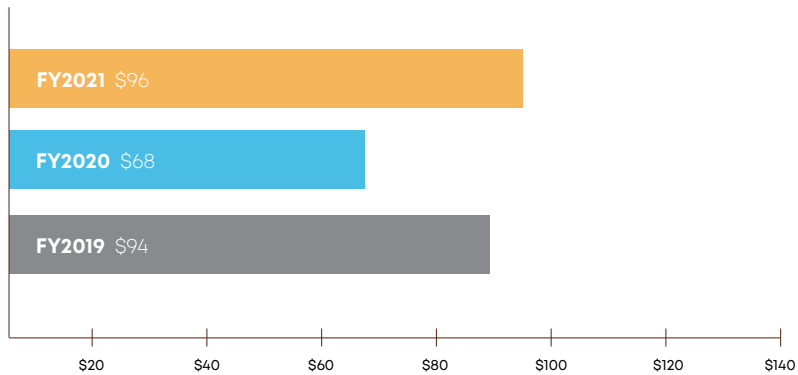
SOURCE: SMITH TRAVEL RESEARCH

LODGING PERFORMANCE

FY2021 METRICS

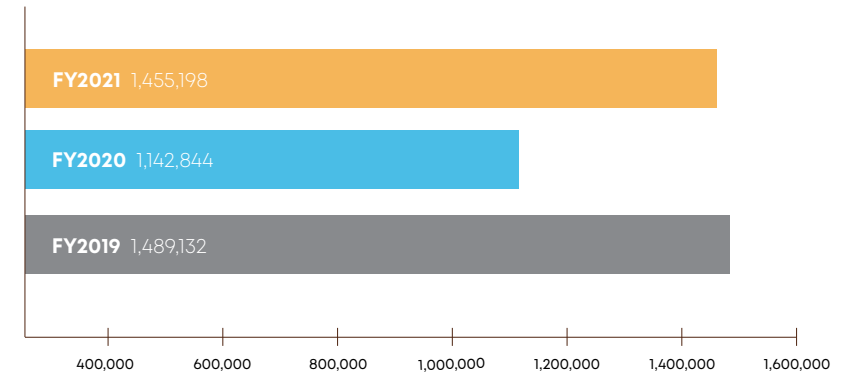
ANNUAL REVPAR

TRADITIONAL LODGING



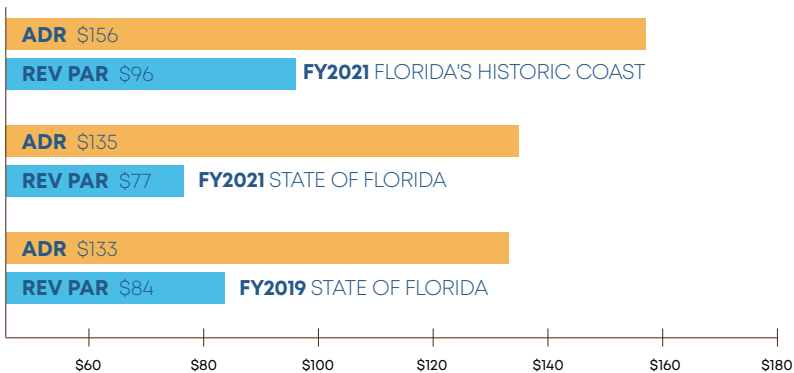
ANNUAL DEMAND

TRADITIONAL LODGING



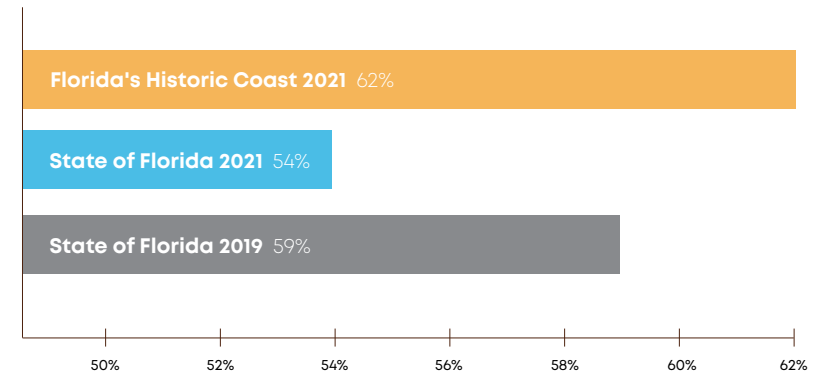
2021 ADR & REV PAR vs. FLORIDA

TRADITIONAL LODGING



OCCUPANCY vs. FLORIDA

TRADITIONAL LODGING



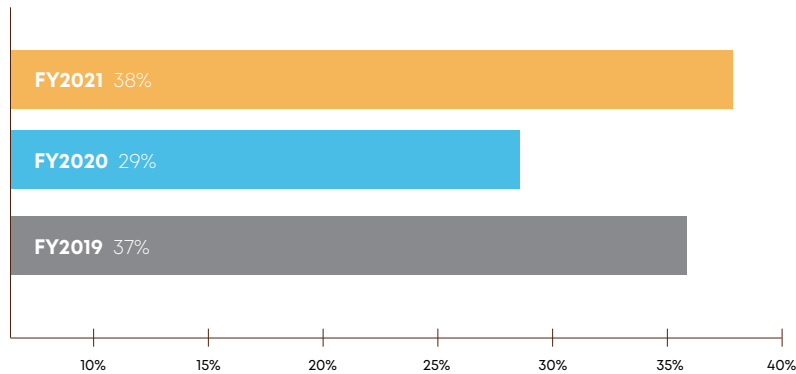
SOURCE: Smith Travel Research

LODGING PERFORMANCE

FY2021 METRICS

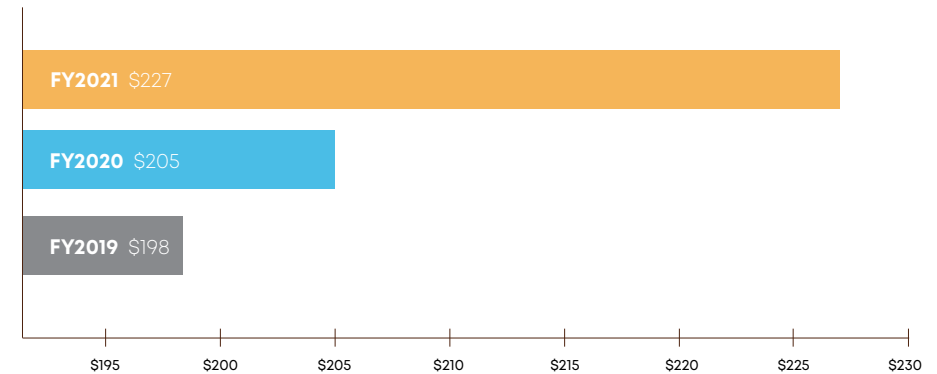
ANNUAL OCCUPANCY

VACATION RENTALS



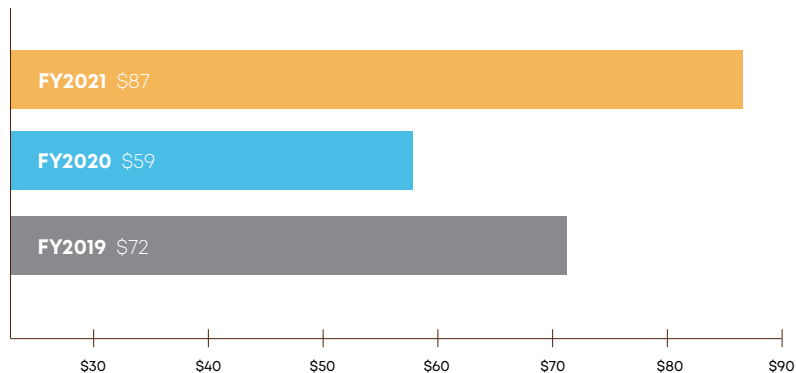
ANNUAL ADR

VACATION RENTALS



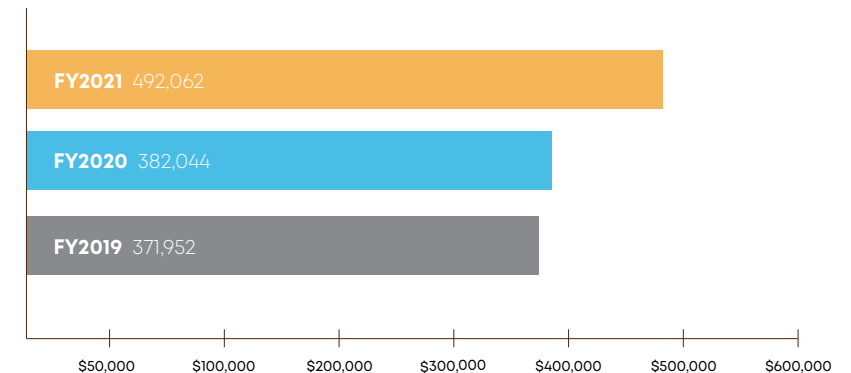
ANNUAL Rev. Per Avail Rm (RevPar)

VACATION RENTALS



ANNUAL DEMAND (Room-Nts Sold)

VACATION RENTALS



SOURCE: AllTheRooms

TOURISM DEVELOPMENT TAX COLLECTIONS

\$14,679,734

FY2021 TOURISM DEVELOPMENT TAX COLLECTIONS

52.5% OVER FY2020 • 21.4% OVER FY2019

RECORD-BREAKING COLLECTIONS IN FY2021

FY2021 VCB BUDGET

- **TOTAL EXPENDITURES FOR FY2021 DESTINATION MARKETING WAS \$4,696,909**
\$143,366 LESS THAN PLANNED
- **RESPONDING TO IMPROVED TRAVELER SENTIMENT, TOTAL PROMOTIONAL SPENDING WAS INCREASED BY 3.3 PERCENTAGE POINTS,**
WHILE OVERHEAD REDUCED BY THE SAME AMOUNT
- **PERCENT SPENDING BY PROMOTIONAL CATEGORY, HOWEVER, TRACKED REMARKABLY CLOSE TO MARKETING PLAN ALLOCATIONS,**
EXCEPT FOR A 3.1 POINT INCREASE IN ADVERTISING AND A .5 INCREASE IN PR

VCB FY2021 OPERATING BUDGET

\$4,696,909

FY2021 SPENDING ALLOCATION

100% OF BUDGETED TOTAL • \$143,366 REMAINING

FY2021 SPENDING ALLOCATION	ACTUAL	% OF TOTAL	BUDGETED	% OF TOTAL	REMAINING
ADVERTISING:	\$2,985,407	63.6%	\$2,928,090	60.5%	-\$57,317
MEETINGS & TRAVEL: (Included in Advertising above)	\$159,418	3.4%	\$165,000	3.4%	\$5,582
PROMOTIONAL SEED FUNDS:	\$59,638	1.3%	\$60,000	1.2%	\$362
WEB DEVELOPMENT & eCRM:	\$86,176	1.8%	\$81,400	1.7%	-\$4,776
PUBLIC RELATIONS:	\$242,721	5.2%	\$224,478	4.7%	-\$18,243
SALES:	\$150,948	3.2%	\$174,007	3.6%	\$23,059
FULFILLMENT & DISTRIBUTION:	\$113,471	2.4%	\$121,500	2.5%	\$8,029
RESEARCH/PROFESSIONAL FEES:	\$45,440	1.0%	\$44,400	.9%	-\$1,040
TOTAL MARKETING RELATED SPEND:	\$3,683,801	78.4%	\$3,633,875	75.1%	-\$49,926
REMAINING OVERHEAD:	\$1,013,108	21.6%	\$1,206,400	24.9%	\$193,292
GRAND TOTAL:	\$4,696,909	100%	\$4,840,275	100%	\$143,366



TPC Sawgrass 17th Island Green

GOLF

Tourism ROI

Aggregate direct spending by golfers on rooms, rounds, and related food, beverage and retail

\$147,091

VCB INVESTMENT

IN FLORIDA'S FIRST COAST OF GOLF PROGRAMS

\$450.67

VCB RETURN ON INVESTMENT

FOR EVERY DOLLAR SPENT



THE FOLLOWING IS HOW ROI WAS CALCULATED

Hotel \$10,240,979 | 61,371 nights @ \$166.87 ADR

Golf \$16,157,075 | 236,042 tourist rounds @ \$68.45/round

Additional Spending \$ 39,891,098 | 40,697 golfers @ \$169/day x 5.8 nights

Total Spending \$66,289,152

Total Value of Ad, PR, Promos \$1,053,879 | **32,686,800 Impressions**

VCB to Spending ROI = **\$450.67: \$1.00 (\$147,090.80/\$66,289,152)**



Media value of the FFCG advertising, PR and promotions in which Florida's Historic Coast or its properties had a significant presence was \$1,053,879 (32 million impressions).

ROI/ECONOMIC IMPACT DATA SOURCES:

2017 UNF Public Opinion Research Laboratory concluded more than 28 publicly accessible golf courses tourist play, stay in St. Johns County commercial lodging

Tourist Round Data: Source - monthly rounds reported by St. Johns golf courses

Average cost per round: Source - CY2021 golf course average rates

2017 UNF Public Opinion Research Laboratory Concluded 52% of golf tourists stay in commercial lodging, 48% stay with friends/family and non-bed tax collecting accommodations

2021 ADR \$166.87: Source - St. Johns County STR report, Traditional Lodging

Average length of stay of 5.8 nights: Source - 2017 UNF Public Opinion Research Laboratory

Daily consumer spending: \$169 Source - VISIT FLORIDA 2019 Golf Visitor Profile

IN-KIND

Contributions

\$206,365

ANNUAL STAKEHOLDER IN-KIND CONTRIBUTIONS

+53.9% OVER FY2020

In-kind contributions are received directly from stakeholders throughout the year in support of communication/PR, promotions, and sales initiatives. The majority of these services/items are provided to the VCB as a donation and/or at a substantial discount



219

NUMBER OF JOURNALISTS, SOCIAL INFLUENCERS AND BROADCASTERS HOSTED

+177.2% over FY2020



29

NUMBER OF GROUP SALES FAMILIARIZATION TOURS AND DESTINATION SITE VISITS FROM MEETING PLANNERS, TOUR OPERATORS, TRAVEL AGENTS, GROUP LEADERS AND BRIDES

74% of FY2020 visits



61

NUMBER OF NATIONAL AND REGIONAL PROMOTIONAL CONTESTS AND SWEEPSTAKES WITH RADIO, PRINT, & TV STATIONS

87% of FY2020 promotions



74

NUMBER OF GROUP SALES PROSPECTS ACQUIRED

87% of FY2020 prospects

BRAND

Research

Research conducted in FY2019 reinforced that “Florida’s Historic Coast” was well regarded and identifiable, and suggested that a new approach of favorably connecting the internationally cultural, upscale yet approachable qualities of the destination with its accessibility would successfully expand the audience of travelers. This, combined with the desire to change perceptions of the destination from a “history only/just need to visit once” place to more of a culturally rich but very accessible place, became an integral part of the new campaign messaging.

Likewise, despite apparent demographic differences between generational cohorts, today’s Purpose Pursuers who are more likely to travel and spend more when doing so possess certain universal ambitions: they want to be culturally enriched as well as entertained by travel. Those Purpose Pursuers surveyed in the research embraced the new campaign which was launched in early FY2020.

FY2020 and FY2021 COVID-19 lockdowns and shifts in consumer behaviors required modification of the new campaign to correspond to the motivations of Americans still willing to consider travel during the ongoing COVID-19 recovery transition. Secondary research was leveraged to modify and evolve the campaign messaging and media vehicles used throughout FY2021.



RESOURCES:

These following tools kept the VCB and its marketing team abreast of changes affecting the broader tourism category as well as traveler behaviors specific to St. Augustine | Ponte Vedra through FY2021:

FY2021 LODGING & SECONDARY RESEARCH RESOURCES:

Destination Analysts’ weekly Traveler Sentiment surveys followed the rapidly changing interests, motivations, and behaviors of prospective travelers specifically tied to COVID-19

Smith Travel Research monitored traditional lodging performance across Florida’s Historic Coast on a weekly, monthly, quarterly, and annual basis

AllTheRooms, a direct monitor of Airbnb and HomeAway/VRBO rentals in St. Johns County, provided a pulse on the vacation rental lodging metrics

Bed & Breakfast lodging category performance reporting was also an important monitoring tool

ONLINE DEMAND MONITORED BY nSight™ TRAVEL INTELLIGENCE

nSight reported on 30-day and 60-day search volume and online booking conversions for future travel dates as well as online search volume and bookings by month, all of which were important in gaging COVID-19 recovery response to the VCB’s advertising, PR and promotional efforts

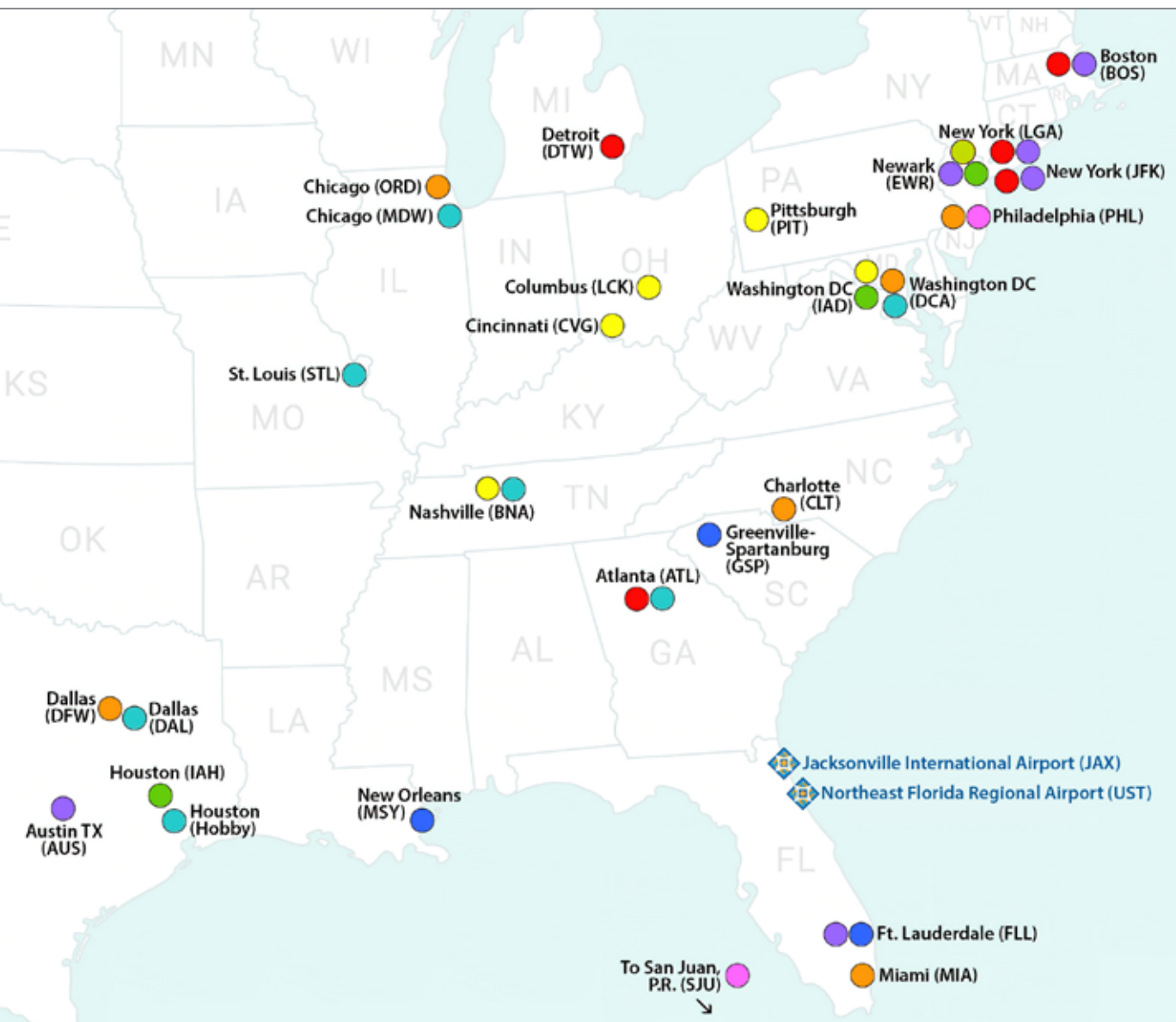
DIGITAL CONVERSION METRICS

Digital performance monitoring dashboard was provided by PETERMAYER Advertising

PAID ADVERTISING

Target Markets





Key Drive Markets:

- Orlando, FL
- Miami, FL
- Tampa, FL
- St Petersburg, FL
- Atlanta, GA
- Jacksonville, FL
- Charlotte, NC
- plus additional nationwide markets based on travel search and purchase behavior



PAID ADVERTISING

Traditional & Digital

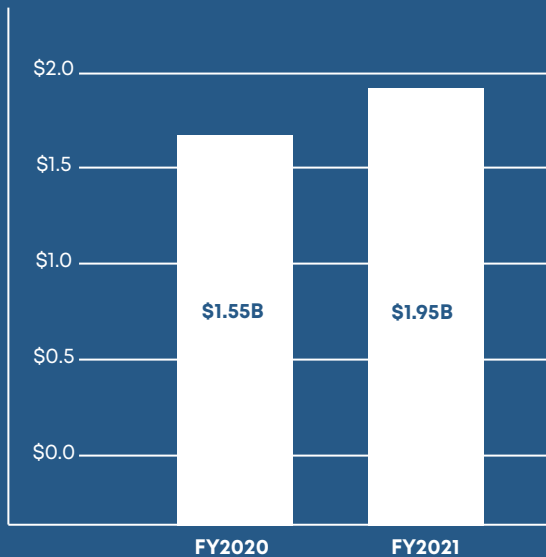
179.9 MILLION
TOTAL IMPRESSIONS

36%
DIGITAL IMPRESSIONS

689,112
CLICKS

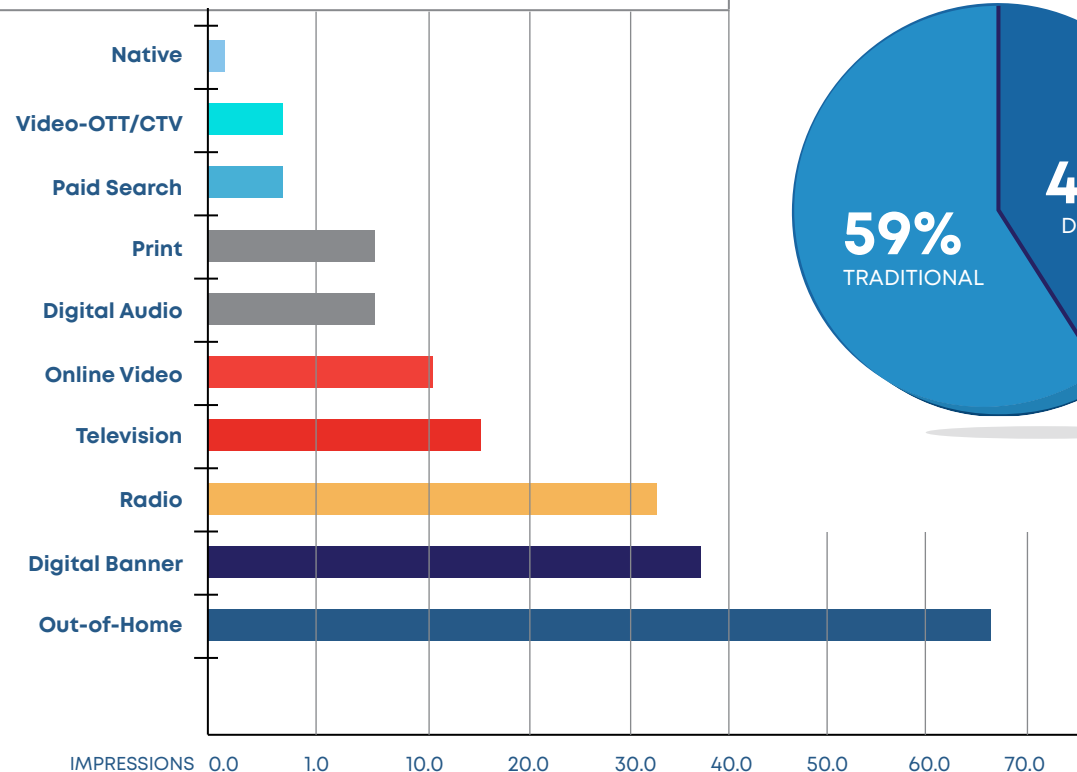
\$2 BILLION
DESTINATION VISITOR SPEND
+26% OVER FY2020

\$ BILLIONS

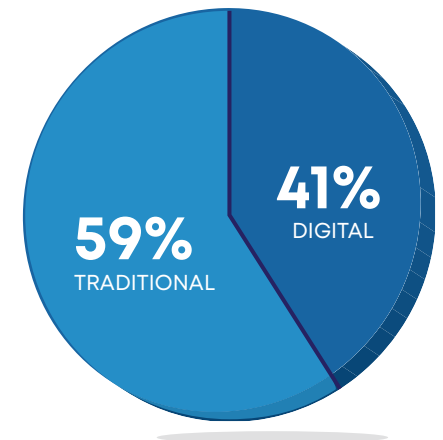


SOURCE: Visa Destination Insights

ADVERTISING
IMPRESSIONS (in millions)



\$1.9 MILLION
PAID ADVERTISING SPEND





Kayakers in front of the Castillo de San Marcos National Monument

PROMOTIONS

and Strategic Alliances

\$1,242,380

MEDIA VALUE

107.1% OVER FY2021 GOAL

\$20.70/\$1.00

FY2021 RETURN ON INVESTMENT

\$1,242,380 MEDIA VALUE/\$60,000 BUDGET



- **SECURED** five in-market filming and/or live-broadcasts including:

- . Tony Leodora, The Traveling Golfer TV Drive I-95 show, which aired November 2020 on NBC Sports and NBC Sports+ reaching 75 million households
- . Atlanta radio station WNNX-FM in-destination five day broadcast in November 2020, with 5.7 million estimated impressions
- . Edicion Digital (Hispanic) Univision Orlando news program and multi-day promotional live broadcast aired in August 2021
- . Extreme St. Augustine, Season II, Let's Take It Outside with Misty Wells (Fox Bally Sports Sun and World Fishing Network), which aired multiple times in September 2021 reaching up to 20.7 million viewers

- **SUPPORTED** development and execution of two sustainable events:

(St. Augustine Food + Wine Festival and St. Augustine Craft Brewers Fest) to generate room nights for May 2021

- **EXECUTED** virtual FY2021 State of the Tourism Industry event in May 2021 which provided tourism stakeholders, influencers, and the public with an update regarding the positive impact of tourism on St. Johns County local economy and its residents. Presentation materials from this event were shared with a variety of community groups throughout the year

WEBSITE/eCRM

FloridasHistoricCoast.com

1,536,610

TOTAL WEBSITE VISITS

+45% OVER FY2020 AND +44.3% OVER FY2019

656,977

ORGANIC VISITS

+81% OVER FY2020 AND +114% OVER FY2019

181,070

BUSINESS REFERRALS

+69% OVER FY2020 AND +8.7% OVER FY2019



E-CRM
180,534
SUBSCRIBERS
95% OF FY2020



FY2021 MILESTONES

- **INCREASED** open rate to 18% for active subscribers and 5% for general subscribers (**exceeded FY2021 goal of 7%**)
- **GREW** click to open rate to 35% (**exceeded FY2021 goal of 25%**)

COMMUNICATIONS

Public Relations & Social Media

64 BILLION

TOTAL ANNUAL MEDIA IMPRESSIONS

+357% OVER FY2021 GOAL OF 14 BILLION

5.9 BILLION

VCB GENERATED MEDIA COVERAGE IMPRESSIONS

+367% OVER FY2020

81.4 MILLION

HISPANIC MEDIA IMPRESSIONS

(INCLUDED IN FY2021 ANNUAL MEDIA IMPRESSIONS ABOVE) 68% OF FY2021 GOAL

SOCIAL MEDIA



250

JOURNALISTS/INFLUENCERS HOSTED

116 in-person; 134 virtual media visits



517,223

FACEBOOK FOLLOWERS

99% of FY2021 goal



386,050

YOUTUBE LIFETIME VIEWS

10.6% over FY2021 goal



40,451

INSTAGRAM FOLLOWERS

98% of FY2021 goal



13,445

TWITTER FOLLOWERS

99% of FY2021 goal



1,331

NEW LINKEDIN FOLLOWERS

+134% above FY2021 goal



photo: Michael LeGrand; St. Augustine Amphitheatre

SALES

Sales Leads and Room Nights

83,166

ROOM NIGHTS

83% OF FY2021 GOAL

2,255

PROSPECTING CALLS/EMAILS

10% OVER FY2021 GOAL

252

LEADS SOURCED

85% OF FY2021 GOAL



GROUP CLOSING FUND (GCF)

\$78,100

DEFINITE & PENDING GCF OFFERS FOR
GROUPS STAYING IN FY2022-2026

47,735

ROOM NIGHTS

\$7,690,278

ROOM REVENUE

\$3,815,207

FOOD & BEVERAGE REVENUE

\$11,505,485

TOTAL REVENUE



FY2021 MILESTONES

- **HOSTED 74** meeting planners, tour operators, travel agents, group leaders and brides
- **ATTENDED 41** Sales Initiatives (Industry Events)
- **APPROVED 12** Group Closing Fund proposals, with a 58% closure rate

CO-OPERATIVE

Advertising

125

CO-OP ADVERTISING SPOTS

4.5% under FY2020

\$109,572

CO-OP MEDIA SPEND

75% FUNDED BY THE VCB

SPECIAL EVENTS

Florida's Birding & Photo Fest: April 2021 (Postponed to 2022)

Florida's Birding & Photo Fest is a birding and photography event featuring more than 110 seminars and field trips throughout St. Johns County.

This festival is unique in that it targets both birding enthusiasts and photographers, specifically nature and bird photographers, by providing a range of events for both groups. Unfortunately, the 2021 Festival was canceled due to COVID-19 and will return in 2022 after a two-year hiatus.



photo: Phillip Wheat; Roseate Spoonbill

LOCAL TOURISM

Industry Programs

302

**TOTAL NUMBER
OF TOURISM
STAKEHOLDERS**

99% OF FY2021 GOAL

24

**TOTAL NUMBER
OF
NEW STAKEHOLDERS**

32

**TOURISM RESOURCE
TRAINING
ORIENTATIONS**

85% OF FY2021 GOAL



FY2021 TOURISM INDUSTRY ANNUAL PROGRAMS

February 10 & 11

Tourism Advisory Workshops

May 6

State of the Tourism Industry Meeting

September 14

Co-op workshop outlining
FY2022 advertising opportunities
for tourism stakeholders

September 16

VCB Annual Tourism Meeting

TOURISM DEVELOPMENT

FY2021 Accomplishments

East view from Flagler College Solarium

This section reports on efforts to encourage, initiate and facilitate the development of touristic infrastructure and services for the fiscal year.

- **SUCCESSFULLY** solicited and hosted the LiquiMoly Pro Watercross Season Opening Races on Vilano Beach (May 1-2, 2021 a targeted need period) which was broadcast on CBS Sports Network and live streamed
- **WAS INSTRUMENTAL** in the successful hosting of the St. Augustine Food + Wine Festival at World Golf Village on May 6-9, 2021
- **THREE NEW HOTELS WERE OPENED**, four new hotels were under construction and one existing property was significantly renovated
- **CONTINUED TO WORK CLOSELY** with SJC Chamber, SJC Cultural Council, and SJC Cultural Events Division on tourism-related economic development opportunities
- **ACTIVELY FACILITATED LOGISTICS AND PROMOTIONAL SUPPORT** for first annual PXG Women's Match Play Championships played in October 2021 at World Golf Village
- **ACTIVELY PARTICIPATED IN THE SOLICITATION OF ELITE AIRWAYS SERVICE** between St. Augustine|Ponte Vedra and Newark/NYC as well as ongoing effort to secure American Airlines service to Charlotte, NC
- **CONTINUED TO SUCCESSFULLY WORK** with JaxSports Authority, SJC Parks & Recreation and Florida's First Coast of Golf on pitching sporting events in the region including fishing tournaments, golf tournaments and other regional amateur team events



photo: Rhonda Lovett; Alpine Groves Park



ST. AUGUSTINE
PONTE VEDRA
FLORIDA'S HISTORIC COAST®