

ST. JOHNS COUNTY
TOURIST DEVELOPMENT COUNCIL MEETING
JULY 17, 2023 1:30 PM
COUNTY AUDITORIUM

1. CALL TO ORDER – Michael Gordon, Chairman
2. PLEDGE OF ALLEGIANCE
3. ROLL CALL
4. APPROVAL OF AGENDA (**Action Required**)
5. PUBLIC COMMENT – 3 minutes, not related to agenda items
6. ENHANCED SUMMER 2023 MARKETING DISCUSSION
Public Comment
7. RECOMMENDED BUDGET (**Action Required**)
Public Comment
8. MONTHLY REPORTS PROVIDED IN PACKETS
9. MEMBER COMMENTS
10. NEXT MEETING DATE – August 21st
11. ADJOURN

TDC Regular Meeting – July 17, 2023

Agenda Item 6 – ENHANCED SUMMER 2023 MARKETING DISCUSSION

- Public Comment

NEWS

As state faces greater competition, should its leaders play politics with Florida tourism?

Since heralding a record-setting comeback from the pandemic shutdown, data obtained by the Palm Beach Post shows the state's 4,500-plus hotels saw business sag in the past three months.

Antonio Fins Palm Beach Post

Published 5:03 a.m. ET July 11, 2023

Comrades across the world, be warned that Florida is not for you.

That was the June 27 message posted on Twitter by the state's former governor and current U.S. senator, Rick Scott.

"Let me give you a travel warning if you're a socialist, communist or someone who believes in big government," Scott said in a video he shared on the social media platform. "I would think twice — think twice — if you're thinking about taking a vacation or moving to Florida."

The missive drew significant commentary on the platform, and not all of it was supportive of Scott's travel line in the sand.

"I'll pass this message onto as many Canadian snowbirds as I can," a Twitter user posted. "I hope they spend their good money on a place where they would feel welcomed. At least you let us know where we stand and u don't need our tourist \$."

More: Dear Canadians: Don't mind Rick Scott. Floridians are the socialists

Actually, Florida could use more tourists — and their dollars.

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<https://www.wsj.com/articles/disney-world-crowds-universal-studios-florida-36b0a579>

LIFE & WORK | TRAVEL

Disney World Hasn't Felt This Empty in Years

Shorter wait times for rides and more discount offers are signs of thinning crowds at the theme parks

By *Jacob Passy* [Follow](#)

July 10, 2023 at 5:30 am ET



The U.S. Air Force conducting a special Independence Day flyover of Magic Kingdom Park on July 4. PHOTO: JAMES KILBY/DISNEY

Visitors to Disney theme parks this summer are encountering something they haven't seen in a while: elbow room.

Travel analysts and advisers say traffic to Disney's U.S. parks, and some rival parks, has slowed this summer. Data from a travel company that tracks line-waiting time at Walt Disney World in Orlando, Fla., shows that the Independence Day weekend was one of the slowest in nearly a decade.

Disney executives have said they have expected weaker earnings from their U.S. parks this year. The Orlando-area resort is even offering hotel discounts around Christmas, typically a peak period.

Travel advisers and industry analysts say the slowdown is the latest sign that Disney's recent price hikes and changes to park operations have soured some families on visiting the Most Magical Place on Earth.

Disney faces a unique set of challenges right now, from streaming losses to executive succession to a political and legal fight with Florida Gov. Ron DeSantis. Revenue from its parks division has long been a bright spot for the company, buoying overall earnings. Disney declined to comment on recent attendance.

A faster ride

Park visitors in recent weeks have had significantly lower wait times to get on rides, according to data from Touring Plans, a company that tracks wait times at major amusement parks, including Disney World and Disneyland in California. Industry analysts say shorter wait times generally correlate with smaller crowds.

At Disney's Hollywood Studios theme park in Central Florida, home to the blockbuster Star Wars attractions, July 4 was the third-slowest day in the past year, according to Touring Plans, which analyzed the wait times that Disney parks post on their mobile apps.

The average posted wait time at the Magic Kingdom park in Florida—which has a special fireworks display on July 4—was 27 minutes this year for the holiday, down from 31 minutes in 2022 and 47 minutes in 2019, the Touring Plans analysis shows.

“It’s something that nobody would have predicted—just unfathomable,” says Len Testa, a computer scientist who runs Touring Plans.

Testa says wait times rose in the following days.

Disney and other theme-park companies can adjust posted wait times for rides to steer visitors toward or away from areas within parks. Longer wait times can also reflect operational issues like broken-down rides.

Speaking during the company’s May earnings call, former Disney finance chief Christine McCarthy said the company anticipated lower demand for the U.S. parks in the second half of the year, partly due to the end of Disney World’s 50th anniversary celebration.

Room to move

Jaime Brown, a speech pathologist and Walt Disney World annual pass holder who lives in Celebration, Fla., visited the resort three times during the Independence Day week, hitting all four of the resort’s parks.

When Brown visited Disney’s Epcot theme park during that stretch, she says she walked onto the Spaceship Earth attraction without waiting. On another day, she scored a last-minute breakfast reservation at Topolino’s Terrace in Disney’s Riviera Resort, which typically books out weeks in advance.

“I couldn’t believe how light the crowds were,” Brown says, adding that the parks felt busier during a 2021 summertime visit.

Florida’s summer heat, humidity and heavy rains make summer a relatively quiet season at the state’s theme parks. The heat index exceeded 100 degrees on several days in early July.

Disney has also intentionally thinned crowds at parks, aiming to improve the park experience for a smaller number of visitors who will spend more money.

Wait times for rides at Universal Studios Florida also dropped on the Fourth of July compared with the 2022 holiday.
PHOTO: DEWAYNE BEVIL/ZUMA PRESS

Still, the July 4 lull signals that tourists have cooled somewhat on theme-park vacations, travel professionals say.

“From what we’re seeing with our bookings, that pent-up demand has somewhat transitioned to cruises and Europe,” says Greg Antonelle, co-owner of MickeyTravels, a travel agency based in Windermere, Fla.

The slower period at parks could extend beyond summer, says A.J. Wolfe, the owner of Disney Food Blog, a website focused on the company’s theme parks. Disney doesn’t have major new U.S. attractions opening soon, apart from a reimagination of the Splash Mountain ride at its Florida and California parks. Attractions based on “Frozen” are being built in Disney’s Paris and Hong Kong resorts, and a “Zootopia” attraction is due to open soon at Disney’s park in Shanghai.

Given that vacationers often visit both Disney World and the nearby Universal theme parks, Testa says some families may be holding off on visiting Central Florida in

anticipation of a third theme park expected to open in 2025 at Universal Orlando Resort.

Crowds are relatively light at Universal Orlando too, travel analysts say. The average wait time with the Universal Studios Florida theme park was 28 minutes on July 4, down from 38 minutes in 2022 but in line with 2019's levels. (Universal Orlando Resort declined to comment.)

The number of people who visited Universal's two Florida theme parks in 2022 combined exceeded the level set in 2019, according to a report from the Themed Entertainment Association, an industry trade group. Attendance at Walt Disney World's theme parks was lower in 2022 than in 2019, partly because Disney has limited capacity at its parks through a reservation system it implemented in 2020.

Fan fatigue

Theme-park fans have loudly complained in recent years about Disney raising admission prices and eliminating free amenities.

Stephanie Oprea, an Atlanta-based senior planner and director of marketing for Pixie Travel, an agency specializing in Disney vacations, says costs are giving travelers pause.

"People might be a little bit fatigued with price increases based on the economy at the moment," Oprea says, noting that some clients have considered cruise or beach vacations rather than returning to Disney's parks due to recent price increases.

At Disneyland, the company increased the cost of multiday tickets by 9% or more in October, with the price of a two-day ticket rising from \$255 per adult to \$285.

To attract more visitors to Main Street U.S.A., Disney has rolled out promotions, including discounts for return visits and savings of up to 40% on rooms at some Disney World hotels for annual passholders on certain days in December near Christmas, which is typically one of the busiest and most expensive times to visit. (Disney has offered discounts to passholders during that time period in the past.)

The company also announced it would bring back dining plans that allow visitors to prepay for meals next year. The plans, popular with Disney die-hards, were suspended in 2020.

Other Orlando-area theme parks, including Universal Studios and SeaWorld, have also started offering discounts and promotions for later this year.

The recent flood of promotions suggests that greater savings could be on the horizon for next year. "If I were going to Disney World, I would probably hold off until 2024," Wolfe says.

Sign up for the new WSJ Travel newsletter for more tips and insights from the Journal's travel team.

Write to Jacob Passy at jacob.passy@wsj.com

Appeared in the July 11, 2023, print edition as 'Disney Magic Fades As Park Crowds Thin'.

Since heralding a record-setting comeback from the pandemic shutdown last year, and kicking off 2023 with a robust first quarter, data obtained by The Palm Beach Post shows many of the state's 4,500-plus hotels saw business sag in the past three months.

Figures compiled by the premiere hotel analytics firm STR show that after a strong start to the year, fortunes retreated in the spring as the three most-watched benchmarks — occupancy rates, the average daily rate per room and revenue per available room — all dropped in April and May in comparison to the same months in 2022. Occupancy rates began their slide in March.

"The year started off very strong, so the early months were good," said Daryl Cronk, director of hospitality analytics at STR's parent company, CoStar Group. "We have seen a little bit of a softening in the last couple of months. There's a couple things going on. Part of it is there is increased competition."

Politics and tourism: DeSantis accuses Trump of "taking sides" with Disney on campaign trail

People are going back on cruise ships, others are heading to Europe

That competition is coming largely from the rebound in cruise-ship bookings with the lifting of the global COVID health emergency, plus the desire of Americans to return to European hotspots this summer.

"There's a lot more competition both domestically and all the international trips," said Cronk, adding that the trend is not too worrisome. "We are watching it but not overly concerned by the trend yet."

Peter Ricci, one of Florida's top tourism analysts, said the pronounced drop in the gauges for South Florida hotels, especially in Miami-Dade County, was disconcerting.

"If you look at the trends, we're down everywhere and we're not looking good," said Ricci, director of the hospitality and tourism management program at Florida Atlantic University.

Florida tourism is what goes up and rarely comes down — barring a Great Recession or global pandemic

The notion that tourism powerhouse Florida would see declines in any sector, barring a crashing U.S. economy or an international pandemic, is surprising.

For much of the past decade, the state has posted year-over-year, record-busting visitor numbers. In 2022, VisitFlorida said the state hosted 137.6 million travelers, the most in its history.

There's reason to think more record-smashing would follow this year.

Carnival Cruise Line said it is seeing unprecedented levels of reservations and deposits. The bullishness over the industry's business prospects explains why Carnival, Norwegian Cruise Line and Royal Caribbean Group were the top three performers in the S&P 500 during the second quarter, according to the financial publication Barron's.

While packed cruise ships will show increases in visitor numbers, analysts say they can dampen the need for hotel stays, as many passengers fly in and out without reserving more than one night's worth of lodging.

Abroad, the United Nation's World Tourism Organization similarly reports that international tourism is on pace to reach "pre-pandemic levels," with the number of people traveling to Europe in the first three months of 2023 reaching 90% of what the figure was in 2019. The trend line was expected to continue increasing this summer.

The momentary sag in hotel-room demand also partly speaks to the slow recovery in international visitors to Florida from the global coronavirus economic shutdown three years ago. VisitFlorida said the estimated 9.8 million people that traveled to Florida from Canada, Europe, the Americas and "overseas markets" in 2022 was still almost 30% fewer than in 2019.

The rush to cruise ships and to see the Eiffel Tower and other Old World sites also points to what some call "Florida fatigue." That term speaks to people who have flocked to

Sunshine State beaches, golf courses and spas multiple times since the pandemic reopening and now sense a been-there, done-that desire to go somewhere else.

"As we are moving beyond the COVID pandemic, things that weren't available because of restrictions, limited travel internationally, these things that weren't available for a couple of years are now available, and there is some pent-up demand for those trips," Cronk said. "We're seeing that this summer."

Spring slowdown speaks more to the 'anomaly' of 2022 boom and return to normalcy in 2023?

Other destinations' lures are proving to be formidable competition for the Sunshine State. Analysts say that's largely why hotel stays in Florida saw an uncharacteristic decline — not simply slower growth — in late spring.

Occupancy rates dropped in March, April and May. The average daily rate for those rooms fell in April and May, as did revenues on all available rooms for those months as well.

Bernardo Neto, general manager of The Ben, a Marriott Autograph Hotel property in West Palm Beach, said 2023 has been strong despite a business dip in April and May when contrasting those months to the same ones in 2022. But Neto said last year's results were "an anomaly" as the travel season extended past the winter season as people sought to travel as pandemic rules elapsed.

Todd Herbst, a West Palm Beach restaurateur and a partner in Big Time Restaurant Group, said he has seen the same trend.

"Our sales are off from last year. Pretty much all restaurants are," Herbst said. "One of our theories is that last year was unusually strong. It was wonderful. And we all thought, 'There's no more season. This is great.'"

This year, business is starting to resemble the typical up-and-down seasonality that defines South Florida, said Herbst, whose restaurants include Elisabetta's, Louie Bossi's and Rocco's Tacos.

Political 'noise' an unhelpful factor this year, others say

While analysts and proprietors blame competition for the tourist dollar for the recent slump in Florida hotel stays, Ricci and others cite one more "ingredient" — politics.

The NAACP, the League of United Latin American Citizens, or LULAC, and The Human Rights Campaign, the largest LGBTQ advocacy organization, have issued "travel advisories" on Florida tourism. Although not boycotts, the statements have been perceived as guidance, if not directives, for Black, Hispanic and LGBTQ people to spend their vacation dollars elsewhere.

In addition, Gov. Ron DeSantis' high-profile battle with Walt Disney World has supercharged the rhetoric, with social conservatives accusing the Central Florida theme park giant of grooming and sexualizing children. Images of neo-Nazis demonstrating outside Disney's Kissimmee property rifled through social media last month.

STR's Cronk said it's "hard to quantify" whether the political atmosphere is impacting travel to Florida.

But in Broward County, tourism officials are keeping a running list.

"We've lost nine conferences in the past two months, all because of politics or state policy," said Stacy Ritter, president and CEO of the Greater Fort Lauderdale Convention & Visitors Bureau.

Ritter said past experience points to a variety of reasons why the county might lose an organization's conference business. Sometimes the price tag is too expensive, and at other times, the culprit is timing if the convention center is booked.

"So there are a variety of reasons why, but this is the first time that we're seeing the political environment pop up as a reason why groups aren't coming here," she said.

"I've got a farmworkers association. They work with training migrants. They mentioned the immigration bill which was passed. I've got an educational leadership conference,

which specifically cited concerns about what the governor is doing in the education space. I've got a group that cited the NAACP travel advisory as the reason."

Ritter said she hasn't totaled how much money the county has lost out on because of the canceled events, but she estimates it is in the \$8 million range.

Ricci noted that he has received 10,000 to 15,000 emails, texts, social-media direct messages and other communications in the past few months from the thousands of people who have earned FAU's tourism-focused certificate.

He said these professionals contacting him work in hotels, restaurants, car-rental agencies and other travel companies in and outside of Florida and they are telling him the political "noise" is a factor and the friction is "not helping."

"Let's just say the political environment is another reason people are not coming to South Florida," Ricci said.

Tourism is too important to state economy to give anyone reason not to come to Florida

What he is being told, Ricci said, is that amid all the surging competition from U.S. and international tourism, Florida should not be giving anyone a reason to second-guess or rethink a vacation in the Sunshine State.

Florida tourism, Ricci adds, is always sensitive to bad news, whether it's widespread coverage of a hurricane's destruction in a corner of the state, a shark bite on a beach or a line of sargassum stretching across the shoreline.

"Next thing is you're like, 'You know what, honey, let's go to Myrtle Beach,' or 'How about we go to Atlanta this year?'" Ricci said. "What everyone is telling me is it's not helping. None of the noise is helping."

Officials at Palm Beach County's tourism promoter say the momentary dip in hotel statistics this spring is easily explainable. The county lost a major conference that "grew so

much" that the county could not accommodate its needs and so it took its business elsewhere, said Milton Segarra, chief marketing officer at The Palm Beaches.

Segarra said he believes the decline in hotel occupancy in April and May will be reversed when the numbers come out for June.

He's heard that occupancy rates last month were in the mid-60 percent range, which Segarra said would be a notch above last year's 62.5%. Plus, indications are the Fourth of July holiday was strong and The Palm Beaches is out promoting the county as a drive-to market for the rest of the summer.

The downward trend in gasoline prices is fortuitous as Palm Beach County typically draws visitors from across Florida — Orlando, Miami, Fort Lauderdale, Tampa Bay — plus Georgia and New York this time of year. Segarra also pointed to the "Shop the Palm Beaches" promotional campaign, as well as another venture that will "take four top area chefs" to New York to promote culinary talents to media and clients.

"Constantly, in June, July, August and through September, we have a lot of events to increase the visibility of the destination and make sure that people will visit us," Segarra said. "It's an indicator of how we are diversifying all types of tourism services and experiences that we can offer. So that's good news."

The bigger question is whether the trend is a harbinger for the rest of 2023. Much of that, STR's Cronk said, will depend on the U.S. economy beating a two-year bout with inflation, as well as whether a slowdown or recession follows.

For the time being, Ricci said his travel-industry alums say the state's leaders, within the business and outside of it, should again speak with one voice and one message. Namely, keep coming to Florida.

That's what helped Florida's tourism industry recover so fast from the pandemic, he said, led by the governor. "He opened us early, so that's the reason we had two years of super success," Ricci said.

Actions that are interpreted as pulling the welcome mat away risk weakening Florida financially.

"The problem is that it's a business that is the number-one private employer and economic engine of the state," Ricci said. "And of most of the 67 counties within the state."

Palm Beach Post reporters *Stephany Matat* and *Alexandra Clough* contributed to this story.

Antonio Fins is a politics and business editor at *The Palm Beach Post*, part of the *USA TODAY Florida Network*. You can reach him at afins@pbpost.com. Help support our journalism. *Subscribe today.*

TDC Regular Meeting –July 17, 2023

Agenda Item 7– FY24 Proposed Budget Recommendation (**Action Required**)

Category 1 - Destination Marketing Requested Budget

	EXPENSE BUDGET LINE	FY24 REQUESTED
Contractual Services	53120	
	VCB Core Services Contract	\$ 3,013,071
	Marketing Contract(s)	\$ 4,118,267
	Cultural Events Initiatives	\$ 500,000
Indirect Admin Costs	53401	\$ 52,388
	Total	\$ 7,683,726

Category 2 - Arts, Culture & Heritage Requested Budget

	EXPENSE BUDGET LINE	FY24 REQUESTED
Contractual Services	53120	
	Cultural Council Core Services	\$1,336,752
	Contracted Cultural Events Support	\$ 800,000
Indirect Admin Costs	53401	\$ 19,645
Category II Grants	53728	\$ 575,000
Special Events	54801	\$ 150,000
Total		\$ 2,881,397

Category 3 - Leisure and Recreation

	EXPENSE BUDGET LINE	FY24 REQUESTED
SALARIES	51200	\$ 70,116
FICA	52100	\$ 5,366
RETIREMENT	52200	\$ 12,166
LIFE/HEALTH INSUR	52300	\$ 15,051
WORKERS COMP	52400	\$ 1,428
CONTRACTUAL SERVICES	53120	\$ 17,583
INDIRECT ADMIN COST	53401	\$ 19,646
SPORTS MARKETING	53705	\$ 300,000
TRAVEL AND PER DIEM	54000	\$ 4,000
COMMUNICATIONS	54100	\$ 600
INSURANCE	54500	\$ 260
VEHICLE MAINTENANCE	54602	\$ 750
OTHER MAINTENANCE	54603	\$ 550,000
ADVERTISING	54900	\$ 31,800
OPERATING SUPPLIES	55200	\$ 5,000
GAS, OIL AND LUBRICANTS	55201	\$ 2,400
TRAINING	55401	\$ 2,000
IMPROVEMENT O/T BUILDINGS	56301	\$ 1,500,000
EQUIPMENT	56400	\$ 108,000
CAPITAL VEHICLES	56415	\$ 29,500
TOTAL		\$ 2,675,666

Category 4 - Admin and Special Uses Requested Budget

	EXPENSE BUDGET LINE	FY24 REQUESTED
SALARIES	51200	\$ 323,863
TEMP STAFFING	51302	\$ 55,000
FICA	52100	\$ 24,595
RETIREMENT	52200	\$ 81,901
LIFE/HEALTH INSUR	52300	\$ 48,828
WORKERS COMP	52400	\$ 295
PROFESSIONAL FEES/RESEARCH	53100	\$ 527,000
CONTRAC SVCS	53120	\$ 1,035,058
INDIRECT ADMIN COST	53401	\$ 26,194
HOLIDAY LIGHTING	53708	\$ 100,000
VISITOR INFORMATION CENTERS	53727	\$ 400,000
TRAVEL	54000	\$ 1,000
COMMUNICATIONS	54100	\$ 15,940
POSTAGE	54110	\$ 100
INSURANCE	54500	\$ 12,461
VEHICLE MAINTENANCE	54602	\$ 500
SPECIAL EVENTS	54801	\$ 70,000
ADVERTISING	54900	\$ 93,000
OFFICE SUPPLIES	55100	\$ 750
SOFTWARE	55102	\$ 1,000
OPERATING SUPPLIES	55200	\$ 1,100
GAS, OIL AND LUBRICANTS	55201	\$ 275
DUES/MEMBERSHIP	55405	\$ 800
AIDE TO PRIVIATE ORG (TPC)	58200	\$ 275,000
TRANSFER TO FUNDS (AMP DEBT SERVICE)	59100	\$ 454,894
TOTAL		\$ 3,549,554

Category 5 - Beach Assets

	EXPENSE BUDGET LINE	FY24 REQUESTED
Indirect Admin Costs	53401	\$ 45,840
Maint- Physical Environment	54620	\$ 162,000
Improvements O/T Buildings	56301	\$ 900,000
Transfer to Funds	59100	\$ 2,414,196
Total		\$ 3,522,036

TDC Regular Meeting – July 17, 2023

Agenda Item Monthly Reports (Information Only)

FY2023 MONTHLY LOTDT DASHBOARD

Occupancy Month	Net to TDC	+/- PY
May	\$ 1,899,752	2.0%
FYTD	\$ 15,545,436	6.2%
% OF BUDGET		66.7%
% OF FY		70.7%

BUDGETED \$ \$ 21,986,880

FY 2023 TOURIST DEVELOPMENT TAX REMITTED BY ACCOMMODATIONS TYPE

OCC. MNTH	H/M	%	PV+-	Condo	%	PV+-	Apts	%	PV+-
October	\$ 966,625	64.3%	-3.2%	\$ 169,146	11.3%	-3.7%	\$ 273,465	18.2%	54.9%
November	\$ 929,682	64.2%	1.7%	\$ 147,183	10.2%	-22.4%	\$ 274,602	19.0%	38.6%
December	\$ 1,258,171	65.6%	-0.6%	\$ 197,554	10.3%	-12.3%	\$ 322,403	16.8%	26.2%
2023 Janaury	\$ 975,482	56.0%	17.1%	\$ 269,059	15.4%	52.9%	\$ 327,089	18.8%	51.6%
February	\$ 1,159,536	58.3%	10.2%	\$ 342,566	17.2%	-10.9%	\$ 333,150	16.8%	15.8%
March	\$ 1,723,615	60.8%	4.8%	\$ 388,742	13.7%	-9.2%	\$ 526,660	18.6%	29.2%
April	\$ 1,376,723	55.3%	-5.0%	\$ 434,408	17.5%	3.0%	\$ 493,201	19.8%	40.2%
May	\$ 1,132,566	58.4%	-4.7%	\$ 303,960	15.7%	-1.5%	\$ 378,007	19.5%	33.3%
June	\$ -			\$ -			\$ -		
July	\$ -			\$ -			\$ -		
August	\$ -			\$ -			\$ -		
September	\$ -			\$ -			\$ -		

OCC. MNTH	Camp	%	PV+-	B&B	%	PV+-	TOTAL
October	\$ 50,054	3.3%	8.9%	\$ 43,541	2.9%	-33.7%	\$ 1,502,830.66
November	\$ 48,721	3.4%	-13.6%	\$ 48,498	3.3%	-40.8%	\$ 1,448,686.66
December	\$ 52,838	2.8%	-16.7%	\$ 86,130	4.5%	11.9%	\$ 1,917,095.73
2023 Janaury	\$ 97,212	5.6%	44.5%	\$ 73,929	4.2%	-1.2%	\$ 1,742,770.75
February	\$ 83,894	4.2%	17.5%	\$ 68,565	3.4%	-3.3%	\$ 1,987,710.57
March	\$ 72,650	2.6%	5.5%	\$ 124,010	4.4%	48.2%	\$ 2,835,677.90
April	\$ 100,278	4.0%	8.5%	\$ 84,785	3.4%	22.4%	\$ 2,489,394.25
May	\$ 62,062	3.2%	12.2%	\$ 61,928	3.2%	-3.1%	\$ 1,938,522.85
June	\$ -			\$ -			\$ -
July	\$ -			\$ -			\$ -
August	\$ -			\$ -			\$ -
September	\$ -			\$ -			\$ -

FY 2023 TOURIST DEVELOPMENT TAX REMITTED BY ZIP CODE

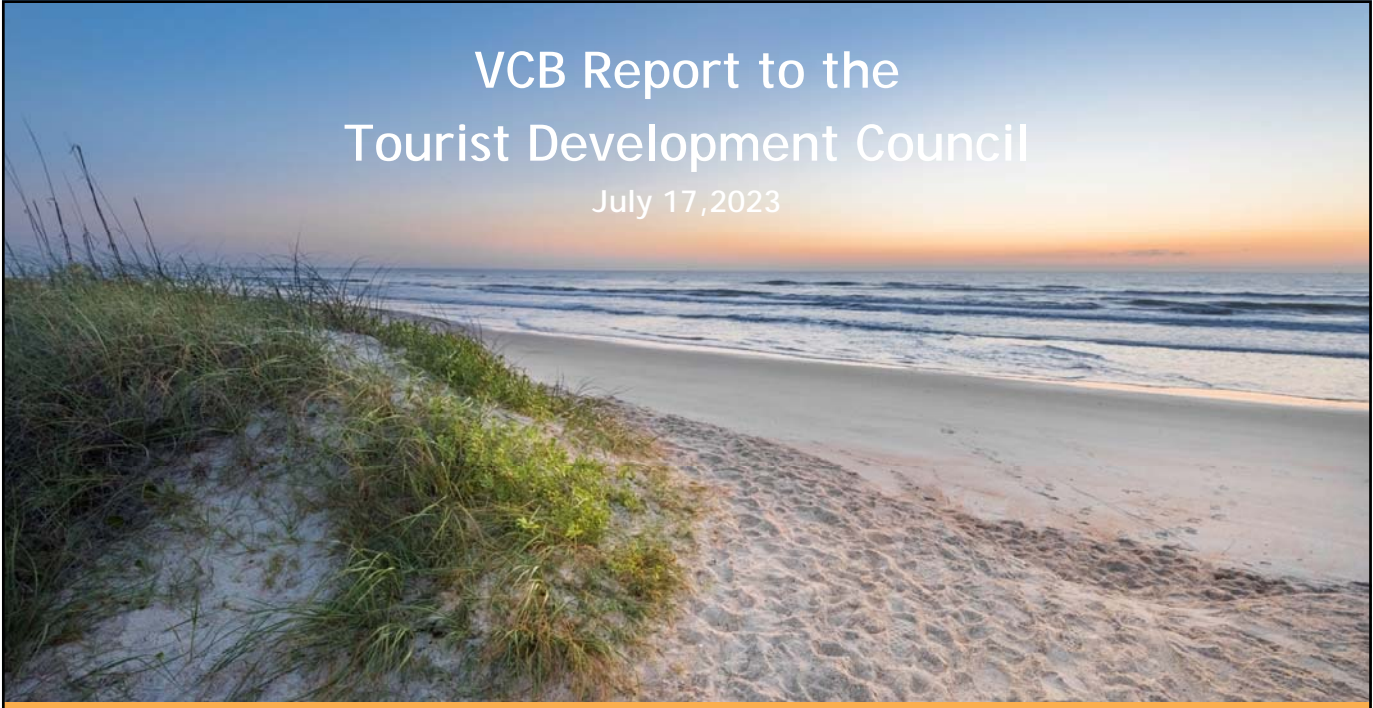
ST. JOHNS COUNTY TOURIST DEVELOPMENT COUNCIL

	Anastasia Island			Ponte Vedra Beach			St. Augustine/Villano/N. Bch			Shores/South/207		
	32080	% TTL	+/- PY	32082	% TTL	+/- PY	32084	% TTL	+/- PY	32086	% TTL	+/- PY
Fiscal Year 2023												
OCT	\$ 415,640	27.7%	-11.1%	\$ 357,846	23.8%	13.5%	\$ 583,683	38.8%	4.1%	\$ 18,949	1.3%	51.1%
NOV	\$ 417,227	28.8%	1.3%	\$ 272,268	18.8%	-7.0%	\$ 618,910	42.7%	2.7%	\$ 24,357	1.7%	-10.0%
DEC	\$ 540,722	28.2%	0.2%	\$ 302,312	15.8%	5.9%	\$ 904,075	47.2%	-1.3%	\$ 31,296	1.6%	39.3%
JAN	\$ 587,071	33.7%	41.9%	\$ 285,908	16.4%	41.0%	\$ 708,461	40.7%	16.8%	\$ 39,575	2.3%	69.1%
FEB	\$ 712,203	35.8%	1.8%	\$ 368,085	18.5%	21.6%	\$ 731,483	36.8%	4.1%	\$ 40,142	2.0%	56.3%
MAR	\$ 970,477	34.2%	3.3%	\$ 599,477	21.1%	9.9%	\$ 1,067,618	37.6%	15.1%	\$ 24,694	0.9%	-24.7%
APR	\$ 954,858	38.4%	7.5%	\$ 518,456	20.8%	10.4%	\$ 832,047	33.4%	-1.2%	\$ 57,618	2.3%	119.7%
MAY	\$ 708,377	36.5%	8.4%	\$ 386,674	19.9%	-3.9%	\$ 703,901	36.3%	2.5%	\$ 26,783	1.4%	31.4%
JUN	\$ -			\$ -			\$ -			\$ -		
JUL	\$ -			\$ -			\$ -			\$ -		
AUG	\$ -			\$ -			\$ -			\$ -		
SEP	\$ -			\$ -			\$ -			\$ -		
FY YTD	\$ 5,306,575			\$ 3,091,026			\$ 6,150,178			\$ 263,413		

	WGV + west of I95			I95&SR16 + Palencia			Other			TOTAL	
	32092	% TTL	+/- PY	32095	% TTL	+/- PY	92+95	OTHER	% TTL		+/- PY
OCT	\$ 106,358	7.1%	17.0%	\$ 14,588	1.0%	48.6%	8.0%	\$ 5,767	0.4%	3.5%	\$ 1,502,830.66
NOV	\$ 93,239	6.4%	5.7%	\$ 14,680	1.0%	19.7%	7.4%	\$ 8,005	0.6%	37.4%	\$ 1,448,686.66
DEC	\$ 105,650	5.5%	8.6%	\$ 18,875	1.0%	9.2%	6.5%	\$ 14,165	0.7%	84.9%	\$ 1,917,095.73
JAN	\$ 99,582	5.7%	12.5%	\$ 16,344	0.9%	-35.8%	6.7%	\$ 5,830	0.3%	-2.0%	\$ 1,742,770.75
FEB	\$ 112,638	5.7%	1.1%	\$ 15,491	0.8%	-15.4%	6.4%	\$ 7,669	0.4%	18.0%	\$ 1,987,710.57
MAR	\$ 138,013	4.9%	-4.2%	\$ 26,134	0.9%	-18.6%	5.8%	\$ 9,265	0.3%	-17.4%	\$ 2,835,677.90
APR	\$ 99,066	4.0%	-21.8%	\$ 18,102	0.7%	-19.7%	4.7%	\$ 9,246	0.4%	-2.7%	\$ 2,489,394.25
MAY	\$ 90,610	4.7%	-15.4%	\$ 14,099	0.7%	-33.8%	5.4%	\$ 8,079	0.4%	-7.5%	\$ 1,938,522.85
JUN	\$ -			\$ -				\$ -			\$ -
JUL	\$ -			\$ -				\$ -			\$ -
AUG	\$ -			\$ -				\$ -			\$ -
SEP	\$ -			\$ -				\$ -			\$ -
FY YTD	\$ 845,157			\$ 138,313				\$ 68,026.31			\$ 15,862,689.37

VCB Report to the Tourist Development Council

July 17, 2023



Combined Lodging Metrics

May 2023

Occupancy (%)	FY 2023			
	Mar	Apr	May	FYTD
This Year	69.1	59.5	50.2	58.2
Last Year	71.6	68.6	59.4	61.5
Percent Change	-3.5	-13.3	-15.5	-5.3

ADR	FY 2023			
	Mar	Apr	May	FYTD
This Year	240.18	222.45	230.16	153.28
Last Year	224.84	213.84	223.40	148.26
Percent Change	5.4	4.0	3.0	3.4

RevPAR/L	FY 2023			
	Mar	Apr	May	FYTD
This Year	166.05	132.38	115.50	89.33
Last Year	163.15	146.75	132.65	91.21
Percent Change	1.8	-9.8	3.0	-2.1

Supply	FY 2023			
	Mar	Apr	May	FYTD
This Year	314,858	325,132	347,741	3,438,582
Last Year	301,179	293,724	311,885	3,219,658
Percent Change	4.5	10.7	11.5	6.8

Demand	FY 2023			
	Mar	Apr	May	FYTD
This Year	217,669	193,495	174,505	2,004,025
Last Year	215,662	201,576	185,183	1,980,700
Percent Change	0.9	-4.0	-5.8	1.2

Gross Revenue	FY 2023			
	Mar	Apr	May	FYTD
This Year	52,280,650	43,042,186	40,163,293	307,181,216
Last Year	49,135,883	43,104,218	41,370,419	293,659,853
Percent Change	6.4	-0.1	-2.9	4.6

Combined STR Traditional Lodging and Vacation Rental Performance Metrics



Smith Travel Research

May 2023

Occupancy (%)	FY 2023			Running 12 Months			Supply	FY 2023			Running 12 Months		
	Mar	Apr	May	2021	2022	2023		Mar	Apr	May	2021	2022	2023
This Year	79.7	72.0	64.3	55.6	68.1	68.2	This Year	206,243	199,590	206,212	2,376,745	2,413,792	2,443,462
Last Year	80.1	77.3	68.8	56.7	55.6	68.1	Last Year	206,553	200,100	206,770	2,315,479	2,376,745	2,413,792
Percent Change	-0.5	-6.8	-6.5	-2.0	22.5	0.2	Percent Change	-0.2	-0.3	-0.3	2.6	1.6	1.2

ADR	FY 2023			Running 12 Months			Demand	FY 2023			Running 12 Months		
	Mar	Apr	May	2021	2022	2023		Mar	Apr	May	2021	2022	2023
This Year	223.76	200.97	186.97	137.60	171.72	177.63	This Year	164,324	143,768	132,561	1,320,716	1,642,894	1,665,848
Last Year	208.38	193.18	181.66	132.34	137.60	171.72	Last Year	165,444	154,663	142,210	1,313,483	1,320,716	1,642,894
Percent Change	7.4	4.0	2.9	4.0	24.8	3.4	Percent Change	-0.7	-7.0	-6.8	0.6	24.4	1.4

RevPAR	FY 2023			Running 12 Months			Revenue	FY 2023			Running 12 Months		
	Mar	Apr	May	2021	2022	2023		Mar	Apr	May	2021	2022	2023
This Year	178.28	144.76	120.19	76.46	116.88	121.10	This Year	36,768,538	28,892,789	24,785,086	181,728,507	282,122,493	295,911,079
Last Year	166.91	149.31	124.94	75.07	76.46	116.88	Last Year	34,475,705	29,877,853	25,833,335	173,826,044	181,728,507	282,122,493
Percent Change	6.8	-3.0	-3.8	1.9	52.9	3.6	Percent Change	6.7	-3.3	-4.1	4.5	55.2	4.9

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Smith Travel Research

May 2023

	Current Month May 2023 vs May 2022					
	Occ %	ADR	Percent Change from May 2022			
	2023	2023	Occ	ADR	RevPAR	Room Rev
Hillsborough County, FL	69.2	163.21	-4.5	7.2	2.4	1.4
Nassau County, FL	63.4	298.26	-11.1	5.0	-6.6	-6.5
Pinellas County, FL	69.8	190.14	-1.6	-3.2	-4.8	-3.4
St. Johns County, FL	64.3	186.97	-6.5	2.9	-3.8	-4.1
Charleston, SC	74.4	190.07	-1.6	-0.4	-1.9	-1.9
Jacksonville, FL	68.0	150.55	-5.3	4.1	-1.4	-0.1
Myrtle Beach, SC	52.8	133.27	-7.9	-7.3	-14.7	-17.3
Orlando, FL	69.3	186.06	-2.5	3.2	0.7	0.9
Sarasota, FL	66.0	172.68	-4.3	-2.9	-7.1	-6.6
Savannah, GA	69.7	156.70	-2.6	0.4	-2.2	-1.8
Fort Walton Beach, FL	68.2	206.72	-4.5	-2.2	-6.5	-6.6
Daytona Beach, FL	59.4	161.90	-2.9	3.6	0.6	-3.6
Zip Code 32084+	67.2	169.60	-2.5	2.5	-0.1	-0.2
Zip Code 32080+	65.0	184.74	-4.5	3.4	-1.3	-1.9
Zip Code 32092+	62.7	115.72	-9.9	0.6	-9.3	-9.6
Ponte Vedra+	62.6	316.30	-9.9	4.2	-6.1	-6.1

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AllTheRooms.com Analytics

May 2023

Active Listings	FY 2023		
	Mar	Apr	May
This Year	6,023	6,428	6,415
Last Year	5,373	5,436	5,423
Percent Change	12.1	18.2	18.1

Supply	FY 2023		
	Mar	Apr	May
This Year	108,615	125,542	141,529
Last Year	94,936	93,924	105,115
Percent Change	14.4	33.7	34.6

Occupancy (%)	FY 2023		
	Mar	Apr	May
This Year	49.1	39.6	29.6
Last Year	53.2	50.2	40.9
Percent Change	-7.6	-21.1	-27.5

Demand	FY 2023		
	Mar	Apr	May
This Year	53,345	49,726	41,944
Last Year	50,466	47,145	42,973
Percent Change	5.7	5.5	-2.4

ADR	FY 2023		
	Mar	Apr	May
This Year	290.79	284.54	268.69
Last Year	291.52	281.50	268.48
Percent Change	-0.3	1.1	0.1

Revenue	FY 2023		
	Mar	Apr	May
This Year	15,512,112	14,149,030	11,270,137
Last Year	14,711,920	13,271,159	11,537,360
Percent Change	5.4	6.6	-2.3

RevPAL	FY 2023		
	Mar	Apr	May
This Year	142.82	112.70	79.63
Last Year	154.97	141.30	109.76
Percent Change	-7.8	-20.2	-27.4



AllTheRooms.com Analytics

May 2023

Area Comparison	Occupancy	ADR	RevPAL	Supply	Demand
32080	31%	\$255.51	\$ 79.12	3,336	22,133
32082	25%	\$430.61	\$ 108.62	439	2,198
32084	30%	\$277.18	\$ 82.56	1,953	13,974
32092	27%	\$186.76	\$ 49.67	313	1,714



Glossary of Terms

- Room Night=> One room times one night, it is a basic component of calculations for occupancy, demand, supply, ADR and RevPAR/L;
- Occupancy=> Percent of available room nights that are occupied in a given period of time (Room nights sold divided by available room nights expressed as a percentage);
- ADR=> Average Daily Room Rate (Revenue from the sale of room nights divided by the number of room nights occupied);
- RevPAR/L=> Average revenue per available room night or listing night (Revenue from the sale of rooms in a specific period divided by all available room nights for the period);
- Demand=> Number of room nights sold in a given period of time;
- Supply=> Total number of room nights or listing nights available for sale in a given period (Smith Travel Research (STR) requires that a room be out of order for at least six months before it can be taken out of available room counts);
- Gross Revenue=> Revenue from the sale of rooms in a given period;
- FYTD=> Fiscal year to date



TDT Collections

May 2023

May (Net Collections)	\$ 1,899,752	2.0%
YTD Net Collections May	\$ 15,545,436	6.2%

YTD Collections by Area	May	YTD
Anastasia Island and St. Augustine Beach (32080)	37%	33%
Ponte Vedra Beach (32082)	20%	19%
St. Augustine, Vilano and North Beach (32084)	36%	39%
St. Augustine Shores/South/207 (32086)	1%	2%
World Golf Village and west of I-95 (32092)	5%	5%
I-95&SR 16/Palencia (32095)	1%	1%
Other	0.4%	0.4%



Website Campaign Updates

June 2023

Top Level Performance

Visits to Website	199,189
Pageviews	374,663
Engaged Sessions	102,068
Engagement Rate	51.24%
Avg Engagement Time per session	2:25

Organic Performance

Visits to Website	77,847
Pageviews	131,407
Time on Site	1:44

Key Performance Indicators

Guides Ordered	687
eNewsletter Signups	72
Clicks on Partner Listings	10,400
BookDirect Clicks (lodging)	2,283

- 57% increase in YOY engaged sessions
- 64% increase in YOY pageviews
- 46% increase in YOY website sessions
- 101% increase in YOY Book Direct Clicks (lodging)



VIC Visitation

June 2023

SJCC –PVBD Visitor & Information Center						
	June 2023	June 2022	% of Total Visitors	FYTD 2023	FYTD 2022	Total FY 2022
Total Visitors	47	47	0.00%	281	391	490

City of St. Augustine Downtown Visitors Center						
	June 2023	June 2022	% of Total Visitors	FYTD 2023	FYTD 2022	Total FY 2022
Total Visitors	55,571	51,245	91%	464,985	366,472	505,368

St. Augustine Beach Visitors Center						
	June 2023	June 2022	% of Total Visitors	FYTD 2023	FYTD 2022	Total FY 2022
Total Visitors	4,082	1,911	7%	19,222	21,091	25,977

Jacksonville Airport Visitor Information Center						
	June 2023	June 2022	% of Total Visitors	FYTD 2023	FYTD 2022	Total FY 2022
Total Visits	1,172	1,016	2%	2,661	9,036	10,695

Total Inquiries at Visitors Centers					
	June 2023	June 2022	FYTD 2023	FYTD 2022	Total FY 2022
Total Inquiries	60,825	54,219	487,149	396,990	542,530

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Departmental Reports



ST. AUGUSTINE
PONTE VEDRA
FLORIDA'S HISTORIC COAST™

Social Media

June 2023

Social Media		YOY Change
Facebook		
Fans added In June	2,692	
Total Facebook Fans	531,116	1.8%
Facebook Impressions	2,520,935	
Engagement Rate	7.0%	
Reach	1,059,937	
Instagram		
Instagram Followers	45,603	5.1%
Instagram Impressions	305,965	
Reach	72,649	
Twitter		
Twitter Followers	14,050	0.0%
Twitter Impressions	35.5K	
TikTok (launched 7/4/22)		
TikTok Followers	4,882	
TikTok Likes	3,742	
TikTok Total Video Views	113,587	
YouTube		
Views To Date	448,200	7.8%

**Changes in Facebook's algorithm continues to impact followers, reach, impressions and engagement*



ST. AUGUSTINE
PONTE VEDRA
FLORIDA'S HISTORIC COAST™

Communications Summary

June 2023

	June	FYTD	FYTD 22	
Total Impressions	6,794,423,615	178,713,963,575	82,919,947,876	116%
VCB Supported Stories <i>in publication or broadcasted</i>	18	327	278	18%



Sales Measurement Summary

May 2023

	May	Monthly % Actual vs Goal	YTD	YTD % Actual vs Goal
Solicitation Emails/Calls	197	12%	1,380	17%
Total Leads Distributed	30	-6%	196	5%
Lead Room Nights	11,800	9%	62,939	18%



Florida's First Coast of Golf

May 2023

	May-23	May-22	% Change
Rooms	6,867	5,475	25%

	May-23	May-22	% Change
Rounds	26,412	21,058	25%

Precipitation	2023	2022	Change
	4.89	0.28	4.61

Temperature (Avg High)	2023	2022	Change
	86	83	3

Digital Traffic

May-23	May-22	% Change
8,077	16,545	-51%
2023 YTD	2022 YTD	% Change
138,302	88,985	55%



CEO's Comments

- May Combined Traditional and Vac Rental Lodging: Occupancy 50.2% (-15.5%), ADR \$230.16 (+3.0%), RevPAR/L \$115.50 (+3.0%), Demand -5.8%, Supply +11.5%, Revenue -2.9%
- May Traditional Lodging Stats: Occupancy 64.3% (-6.5%), ADR \$186.97 (+2.9%), RevPAR \$120.19 (-3.8%), Demand -6.8%, Supply -0.3%
- May Vacation Rental Stats: Occupancy 29.6% (-27.5%), ADR \$268.69 (+0.1%), RevPAL \$79.63 (-27.4%), Demand -2.4%, Gross Rev -2.3 and Supply +34.6%
- May Publicity: Supported stories FYTD 336, +31% to FYTD 2022.
- May Sales team lead distribution was +5% YTD goal, with solicitations at +17% of goal.
- A Sing Out Loud Festival microsite will be launched in late July 2023. In addition, a live music page on the FHC.com website has been launched, which includes the Visit St. Augustine music app as well as the ability to sort live music by genre and date.
- The VCB has finalized creative for the new Expedia Group co-op promotion for lodging partners. The VCB will be featured as the destination, with 12 lodging co-op partners. This new test promotion runs August 1-October 31, 2023 and will also incorporate the Sing Out Loud Festival for August and September.
- In early July, the VCB launched a Summer 2023 destination attractions promotion (www.FHCSummerFun.com) utilizing two digital platform partners (a.ki and Travel Spike). The promotion was designed to help area attractions which are now down from 10-20+% year-over-year.
- The VCB is testing a new "must do experiences" video series which will be included on our website, in social media, and in our consumer e-newsletter. The idea is to leverage some of our unique experiences and encourage visitors to stay just one more day and enjoy some of the gems that can be found here on Florida's Historic Coast. Here's the first of the series: <https://www.youtube.com/watch?v=ovMI9QMnGww>
- Thanks to a grant from the SJC TDC and support from Tera Meeks and Isabell Renault, the VCB staff has completed the IBCCES Autism and Sensory Awareness Training. We look forward to St. Johns County becoming an autism certified destination in the near future.

