



DESTIN  
FORT  
WALTON  
BEACH  
FLORIDA

July 26, 2022

DESTIN-FORT WALTON BEACH

# Research Review and Planning 2023



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A wide-angle photograph of a beach at sunset. The sky is a mix of orange, yellow, and blue, with some clouds. The ocean is dark blue, and the waves are gently washing onto the sandy beach. In the distance, three people are visible in the water, silhouetted against the bright sky.

# Goal: Be valuable

- **Reintroduce Destin-Fort Walton Beach as the place that gets kids outside on the water to give their adventurous side room to grow.**
- **Create a more personal, connected experience for families in Destin-Fort Walton Beach Florida.**
- **Be a shared community asset for both the tourism industry and the residents of Destin-Fort Walton Beach.**

# Strategy

**Broaden the net to emerging markets by introducing new families to Little Adventures.**

**Optimize to continue to elevate experiences and connect moms together for inspiration, real-time adventure ideas and advice.**

# 2023 Planning Scenarios

1. **70/30:** Stay the course. Prioritize new families.
2. **90/10:** Take more risk with markets showing positive momentum.
3. ~~100/0:~~ Change markets. Consider new market(s)/new families to build from.
4. ~~0/100:~~ Change strategy. Focus on driving more volume with established markets.



# 2023 Planning Scenarios

## Stay the Course

**70%** of budget to prioritize new families and influence visitation before they come.

**30%** of budget to improve experience for all on vacation and get on radar sooner.

Target “repeat visitor” markets like Atlanta, Houston, New Orleans in April/May

Expand in-destination to influence Little Adventures during summer months.



# 2023 Planning Scenarios

## Take More Risk

**90%** of budget to continue to influence the long-term success in high growth-potential markets

**10%** of budget to improve experience during the summer for all on vacation

Target markets like Chicago, DC, Minneapolis with more “TV”

Pull back in “repeat visitor” markets like Atlanta, Houston, Dallas



# Our Families

**KIDS AGE 3-10**

**“MILLENNIAL” PARENTS**

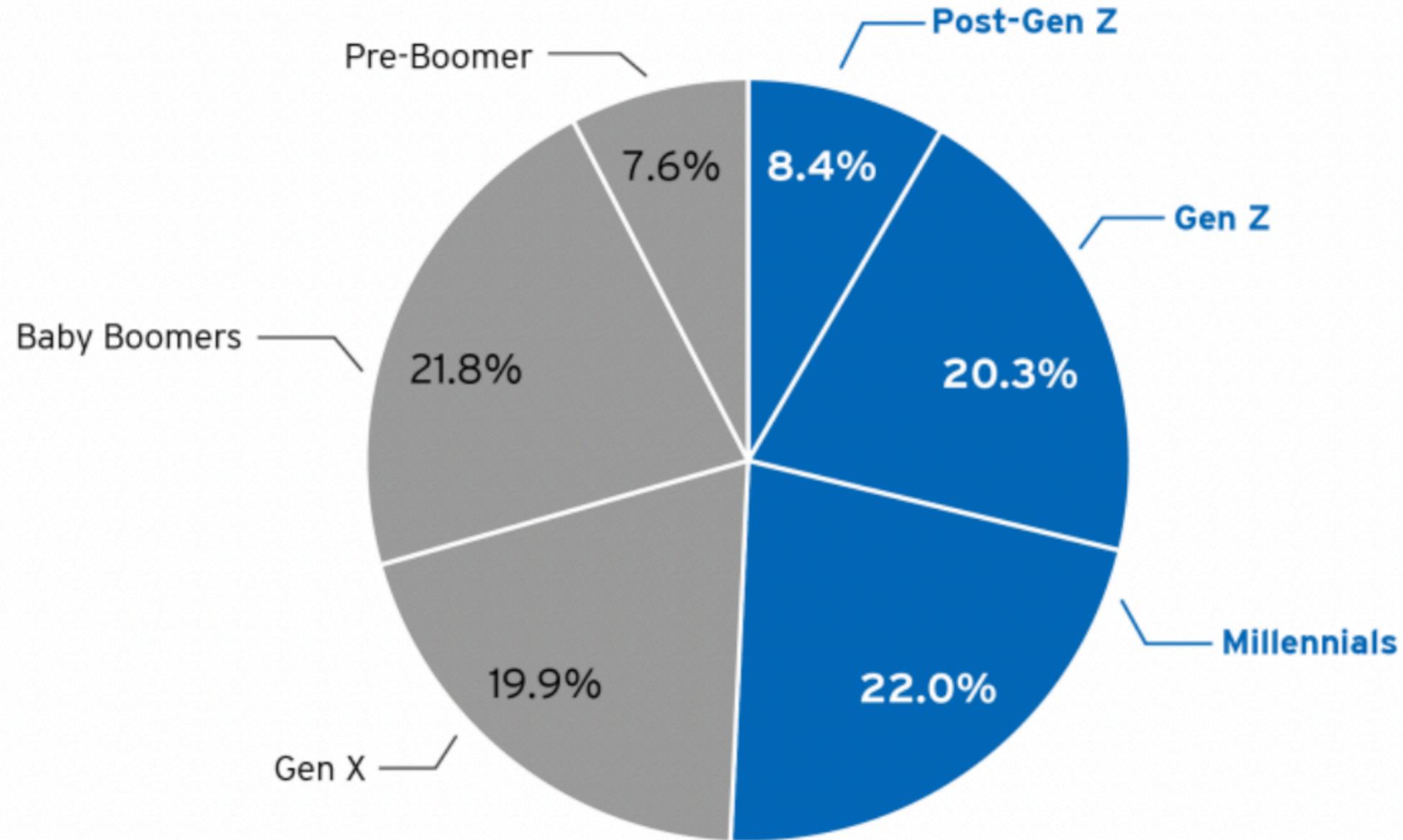
**NEW EXPERIENCES SLOW TIME  
DOWN**

**ADVENTURES ARE A CHALLENGE**

**SELF CONFIDENCE IS PRICELESS**



## Share of US population by generation



Numbers pertain to July 1, 2019

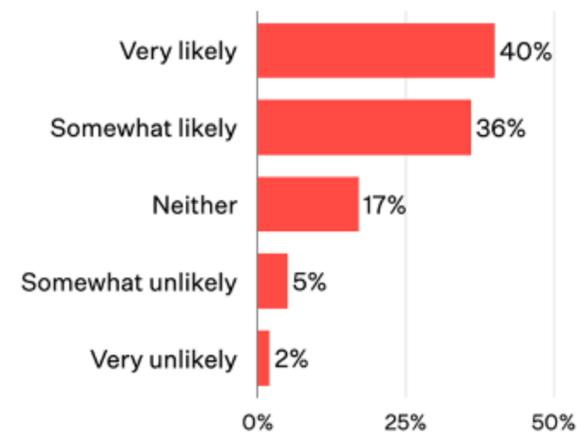
Note: Birth years are as follows: Post Gen Z (2013+), Gen Z (1997-2012), Millennials (1981-1996), Gen X (1965-1980), Boomers (1946-1964), Pre-Boomer (1945 and earlier).

Source: William H. Frey analysis of Census Bureau population estimates released June 25, 2020.

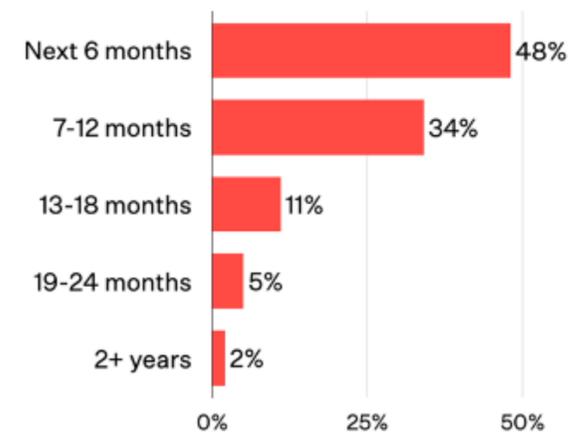
# Uncertainty, Ambiguity and Concerns are balanced with Younger Optimism

## Most US consumers believe a recession is likely within the next year

Percentage of responses: How likely is the US to head into a recession?



Percentage of responses: When do you expect the US to enter recession?



Data: Consumer Trends Survey, powered by toluna\* (n=3112, n=2361)

The New Consumer | Coefficient

## But we're not (yet?) in a recession: Americans are still spending money

Change in indexed aggregate US consumer spending



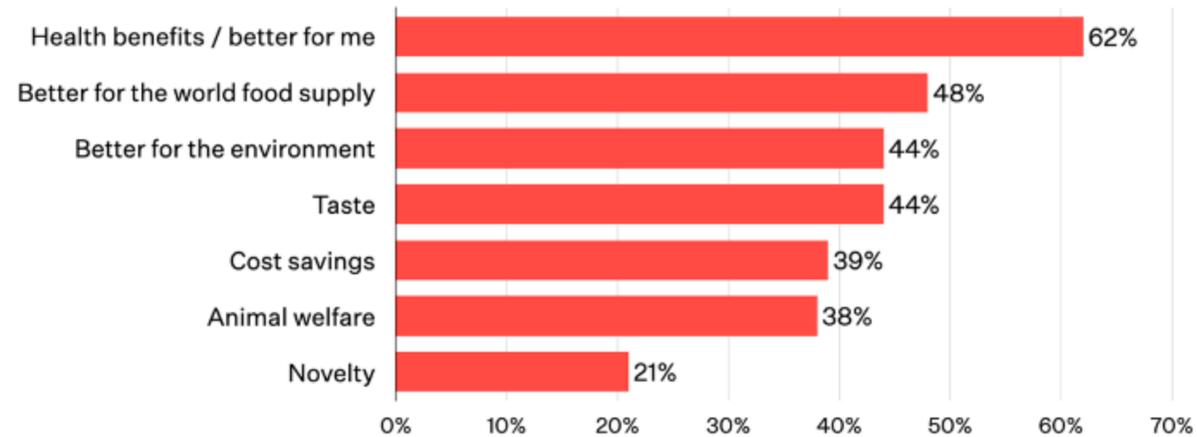
Data: Earnest Research. 4-week trailing average, indexed to initial period ending Feb. 5, 2020.

The New Consumer | Coefficient

# I deserve what I want. Now.

## Among those interested in plant-based alternatives, health is the top reason

Percentage of responses: What are the top 3 reasons you're interested in plant-based meat or dairy alternatives?

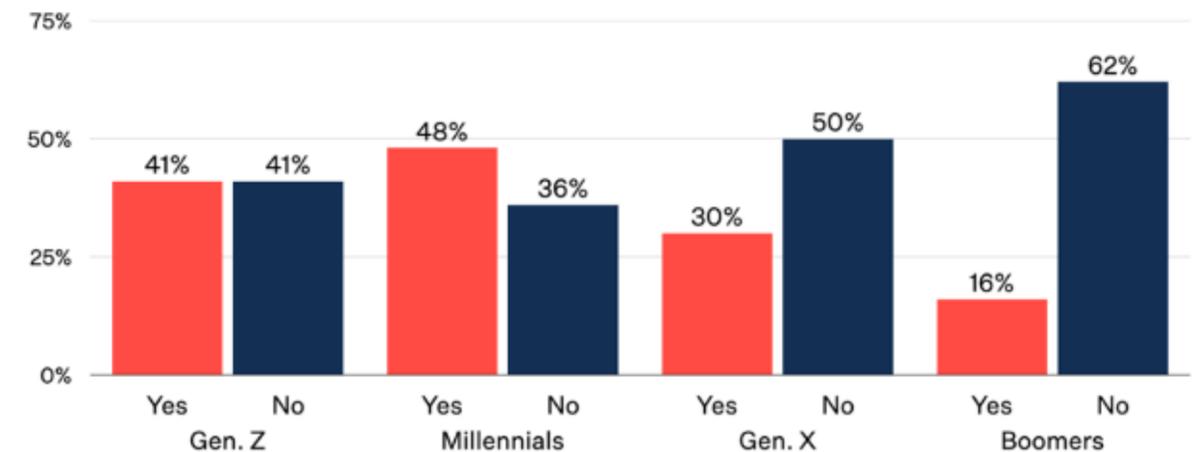


Data: Consumer Trends Survey, powered by toluna\* (n=927 — “very” or “extremely” interested in plant-based products)

The New Consumer | Coefficient

## About 1/3 of US consumers say they plan to eat more plant-based foods

Percentage of responses by generation: Do you plan to eat more plant-based foods over the next 12 months?



Data: Consumer Trends Survey, powered by toluna\* (n=3112)

The New Consumer | Coefficient

# Destin-Fort Walton Beach is valuable. Families expect to pay more.

**“I want brands I buy to speak to me like I’m their best friend”**

“Somewhat” or “strongly” agree:

**42%** **51%** **31%**

Gen. Z Millennials All others

**“I want brands that make me feel like I’m part of a community”**

“Somewhat” or “strongly” agree:

**46%** **55%** **31%**

Gen. Z Millennials All others

**“I care about the people behind the brand, not just the brand itself”**

“Somewhat” or “strongly” agree:

**43%** **56%** **30%**

Gen. Z Millennials All others

**“If brands do not take a stance on important social issues, I will not buy from them”**

“Somewhat” or “strongly” agree:

**32%** **42%** **19%**

Gen. Z Millennials All others

A woman is shown snorkeling underwater in clear turquoise water. She is wearing a dark swimsuit and a necklace. Her eyes are closed, and she has a serene expression. Bubbles are rising from her snorkel, and several small fish are visible in the background. The lighting is bright, creating a shimmering effect on her skin and the water.

**We get kids outside  
on the water to give  
their adventurous  
side room to grow.**

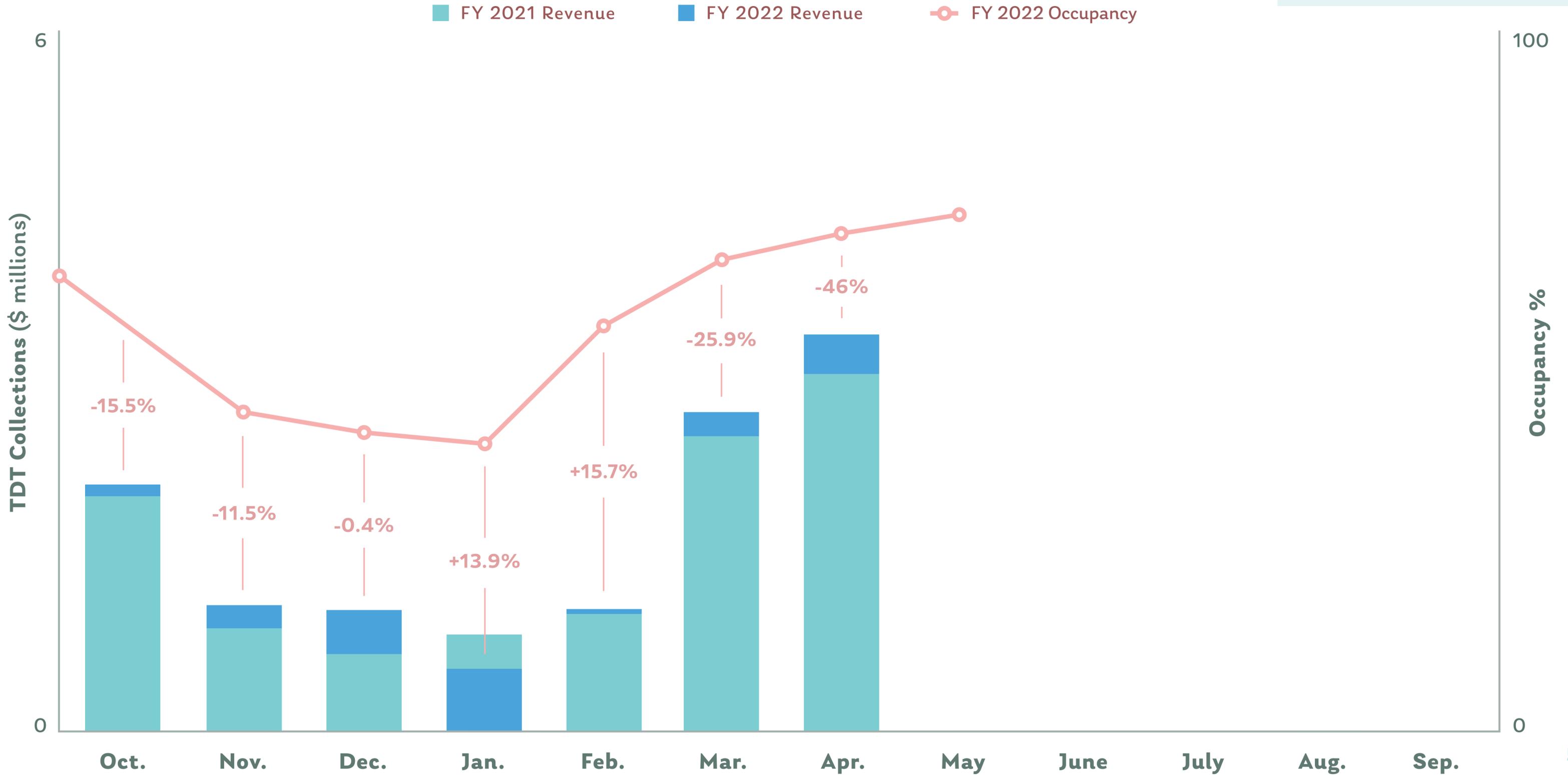
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# Spend growth

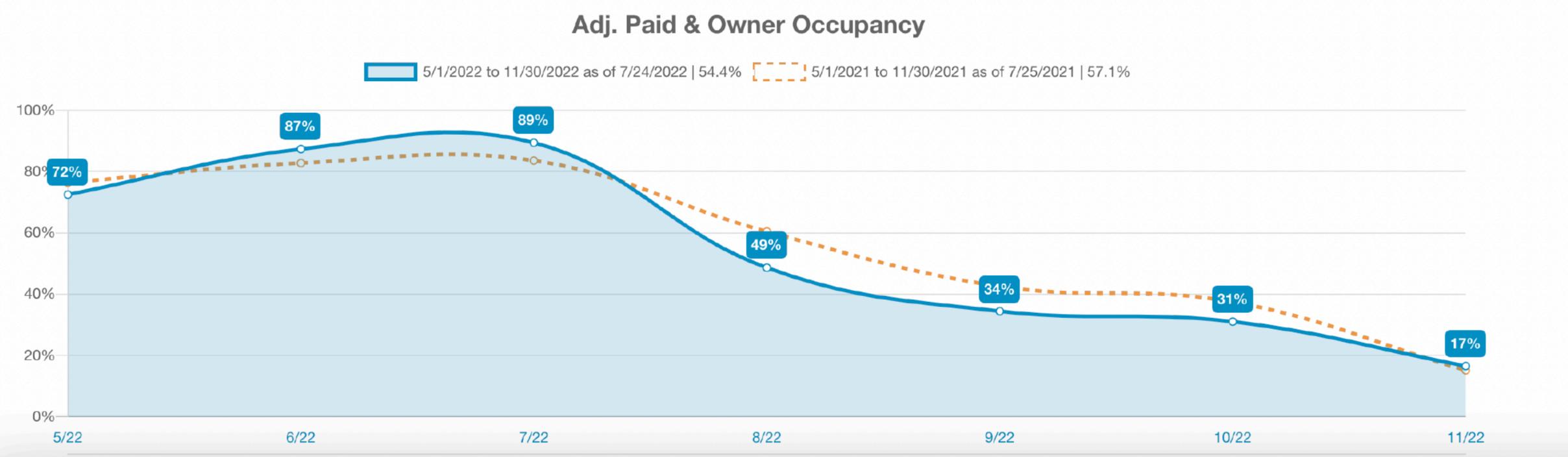
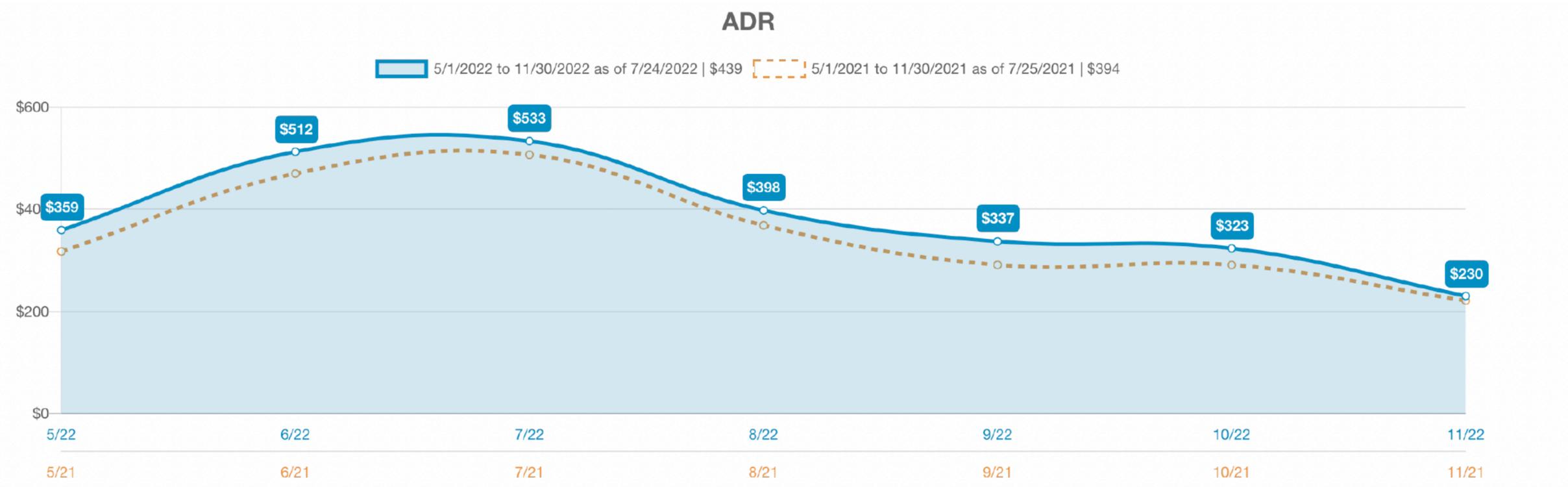
**+13.1% over 2021**

# Are we narrowing the gap?

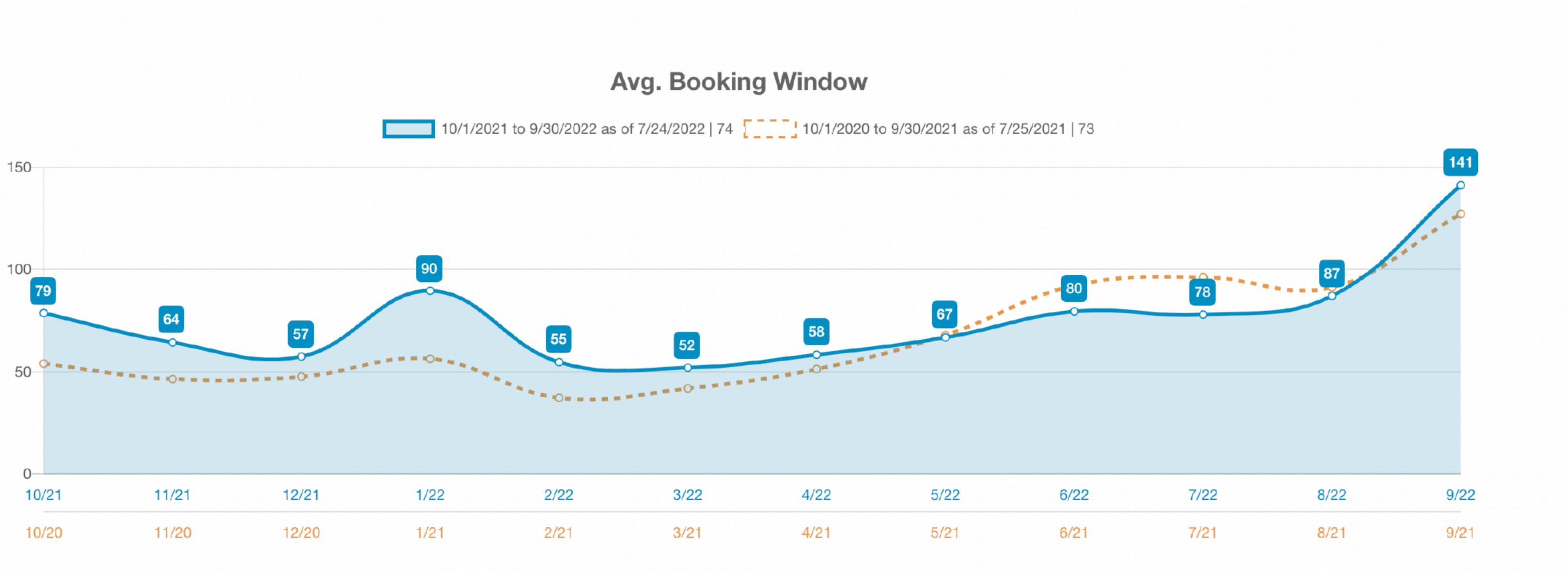
\*Gap Comparison is between FY 21 and FY 22



# Average stay value +11%



# Flat average booking window





# Hyper-Local

MARKET APPROACH

# Markets

Atlanta

Dallas/Ft. Worth

Nashville

St. Louis

Cincinnati

Chicago

Indianapolis

DC/NoVa

Detroit

Minneapolis





# Markets

Our established markets are similar to Atlanta in spend per visitor and less than a 10 hour drive.

Houston

New Orleans

Memphis

Louisville

Huntsville

Knoxville

Gulfport/Biloxi, MS

Columbus, GA



# 2023 Planning Scenarios

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# 2023 Recommendation

Stay the course with New Families  
70% budget emerging / 30% to established

Use “TV” to connect at scale - possibly in  
new decision windows.

Feed families “bite-sized” content to match  
“bite-sized” Little Adventures.

Prioritize Houston as good blend of repeat  
vs. new families.

Find ways to reinforce experience =  
wellness.



# Planning for 2023: three initiatives

## **Key Market:** New Families

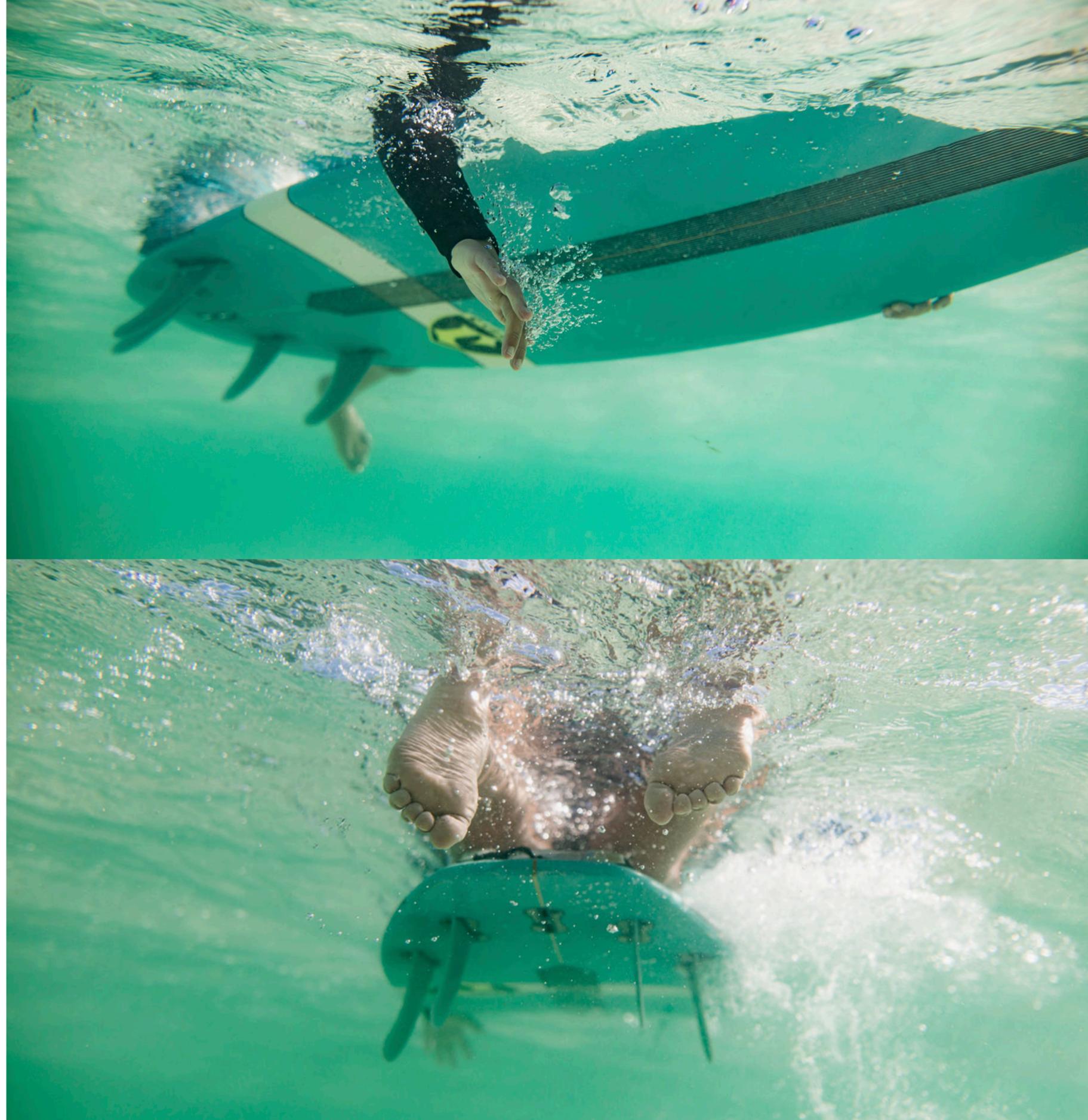
- Kicking off initial strategy planning approach to influence perception and intent to travel
- Planning Timing: June - September

## **In- Market:** Repeat Families

- Currently activating 2022 campaign.
- Planning Timing: September - December

## **Destination Stewardship:** Local Families

- Currently activating 2022 initiatives.
- Planning Timing: October - January



A photograph of two young boys playing in the ocean. The boy on the left is walking towards the water, while the boy on the right is standing with his arms raised, splashing water. The water is splashing high into the air, creating a large cloud of droplets. The background is a bright, cloudy sky over the ocean.

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