



OFFICE OF THE CITY COUNCIL

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A G E N D A

TOURIST DEVELOPMENT COUNCIL CONVENTION SALES & SERVICES SUBCOMMITTEE

Honorable Lori N. Boyer, TDC Chairman

Friday, June 16, 2017

10:00 A.M.

117 West Duval Street

City Hall, Fourth Floor

Conference Room A

I. CALL TO ORDER

Roll Call

City Council President Lori Boyer, Board Chairperson

Kirit Patidar, Board Member

Jeffrey Truhlar, Board Member

Dr. Cheryl L Brown, Director – Jacksonville City Council

Annette Hastings, TDC Executive Director

Jeff Clements, Chief of Research

Kyle Billy, Council Auditor

Phillip Peterson, Council Auditor's Office

Lawsikia Hodges, Deputy General Counsel

Meeting Convened

Meeting Adjourned:

II. Introductions

III. Purpose of Subcommittee Meeting

VI. TDC Omnibus RFP ESC-0136-17 –Convention Sales Services Plan Component three (3)

- **Metric Goals & Evaluations**

Public Comments (*Public comments must be heard, if any, prior to each vote*)

Action Item: _____

V. Closing Comments

VI. Adjourn

*****Other Items may be added or deferred at discretion of the Chair. *****

Additional Convention Sales & Services metrics are as follows:

PROMOTION TO TOURIST GROUPS METRICS

Convention Promotions & Marketing

- Number of ad placements
- Total advertising response:
 - Website statistics for convention/group pages
 - Written/Internet inquiries
 - Tradeshow booth appointments and visits
 - Results from convention and group offers and special promotions

Good

Convention & Groups Communications

The following Convention Sales & Services communications measurements will be provided to the TDC each quarter:

- Total number of media stories
- Ad value equivalency
- Social media results for LinkedIn

✓

CONVENTION MARKET TARGETING METRICS

- Destination Group occupancy, average daily rate, and revenue per available room
- Number of sales accounts
- Number of sales contacts
- Percentage of bookings generated from key market segments
- Total number of room nights booked from key market segments
- Percentage of sales leads generated from key market segments
- Total number of sales lead room nights key market segments
- Determining our competitive set for meetings, conventions, and groups

Good

CONVENTION SALES ACTIVITIES METRICS

- Total number of room nights booked**
- Total number of group bookings**
- Total attendance from group bookings**
- Total number of sales leads**
- Total number of lead room nights**
- Percentage of new vs. repeat bookings
- Tradeshows, convention, and conferences attended/exhibited
 - Number of tradeshows
 - Number of tradeshow sales leads
 - Number of tradeshow contacts
- Destination Familiarization Trips (FAMs)
 - Number of participants
 - Number of accounts represented

0.12%

The following documents are contained in this packet for your information:

- Segment Trend for Group Occupancy, ADR, RVPAR 2011-2012
- Destination Overview Smith Travel 2003-2012
- Visit Jacksonville Sales & Service Goals FY 2016-2017
- Visit Jacksonville Data for FY2013-2016
 - Leads
 - Leads Room Nights
 - Definite Bookings
 - Definite Room Nights
 - Goals Definite Room Nights
 - Goals Leads Room Nights
- Visit Jacksonville President's Report 2nd Quarter YTD 2016-17
 - STR Report Metrics
- STR Report (TAB 11) Trend Duval County 2014-2016
- Visit Jacksonville Industry 5 Year Aspirational Plan .

Segment Trend for Group Occupancy, ADR, REVPAR

Year	FY Annual Production	FY Adjusted RN Production	Group Bookings	Occupancy	% change	ADR	% change	REVPAR	% change
2011	247389	164038		16.20%	-9.8	\$74.04	3.3	\$12.03	-6.8
2012	231722	151916		17.10%	5.2	\$73.97	-0.1	\$12.64	5.1
2013	149523	140567		15.70%	-8.6	\$74.09	0.6	\$11.62	-8.1
2014	118476		232	16.30%	3.7	\$76.58	3.3	\$12.46	7.2
2015	90092		157	15.20%	-6.4	\$81.62	6.6	\$12.43	-0.2
2016	87000		TBD	16.40%	7.6	\$88.69	8.7	\$14.54	16.9

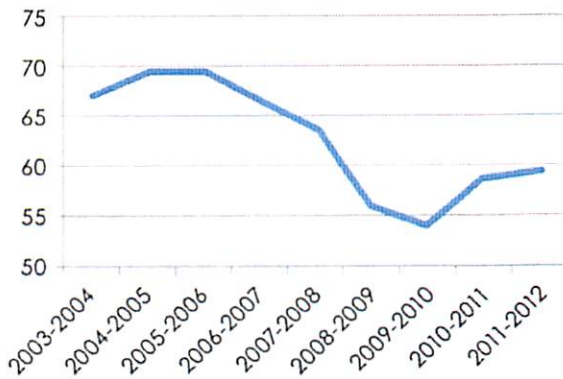
DESTINATION OVERVIEW/RESEARCH

INDUSTRY TRENDS

Jacksonville has seen a steady growth in travel over the last year. Though the city has not seen the record number of visitors that other Florida destinations are experiencing, we are still seeing slight increases each month.

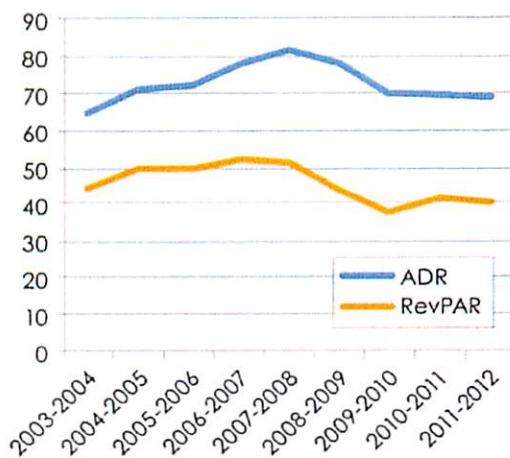
There has been growth across the board since the start of 2012. Duval County Occupancy has increased every month and year to date (YTD) we are up 3.4%. Duval County Average Daily Rate (ADR) is also up YTD 2.7% as well as Revenue per average room (RevPAR) up 6.1% YTD. There have been gains across the different neighborhoods of the city, as well.

Smith Travel Report Trend – Occupancy

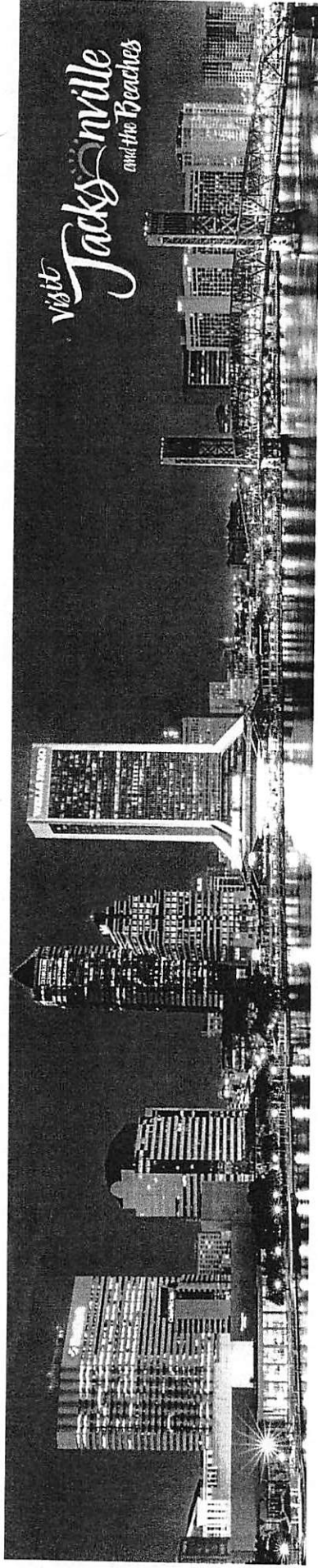


June - July	Occupancy
2003-2004	67.3
2004-2005	69.5
2005-2006	69.2
2006-2007	66.8
2007-2008	63.4
2008-2009	55.8
2009-2010	54.2
2010-2011	58.4
2011-2012	59.9

Smith Travel Report Trend ADR & RevPAR



July-June	ADR	RevPAR
2003-2004	65.69	44.26
2004-2005	71.11	49.81
2005-2006	72.25	50.16
2006-2007	77.97	52.05
2007-2008	81.67	51.75
2008-2009	77.8	43.41
2009-2010	70.17	38.08
2010-2011	69.22	40.42
2011-2012	70.4	42.14



FY 2016-2017 Sales & Services Goals (Tentative)

- Leads Generated* – 572, with tracking of Lead Room Nights
- Definite Group Bookings* – 195
- Definite Group RN Goal* – 87,000
- Site Visits. – 88
- Sales Prospecting Efforts – 6,000 completed activities
- Groups Serviced – 245
- Services Referrals – 300
- Convention Services Completed Tasks – 2,400

*DMAI Reporting Standards for DMOs



VisitJacksonville.com

	Leads	Leads (RNs)	Definite Bkgs	Definite (RNs)	Goals Definite (RNs)	Goals Leads (RNs)
FY 2015-16	526	461,850	169	90,092	95,700	278,400
FY 2014-15	648	515,003	232	118,476	107,000	342,400
FY 2013-14	846	646,170	294	151,333	134,000	428,800

Tab 11 - Seg Trend Duval County, FL

Visit Jacksonville
For the Month of July 2016

Currency: USD - US Dollar

Current Month	This Year												Percent Change (%)												
	Occupancy (%)				ADR				RevPAR				Occupancy (%)				ADR (%)				RevPAR (%)				
	Trans.	Grp.	Con.	Total	Trans.	Grp.	Con.	Total	Trans.	Grp.	Con.	Total	Trans.	Grp.	Con.	Total	Trans.	Grp.	Con.	Total	Trans.	Grp.	Con.	Total	
2015	Feb	49.8	19.3	3.9	73.0	82.91	81.43	39.18	80.17	41.30	15.68	1.54	58.51	7.8	-8.0	12.0	4.0	9.1	-1.1	4.9	5.6	17.7	-7.0	17.5	9.8
	Mar	54.5	18.0	4.5	75.0	86.42	87.23	39.55	83.77	47.08	13.92	1.79	62.80	8.0	-10.4	6.4	3.4	11.7	8.6	7.8	10.7	20.6	-2.6	14.8	14.4
	Apr	51.7	17.4	4.3	73.4	88.67	83.29	41.59	84.62	45.81	14.51	1.80	62.11	9.3	-15.9	19.4	2.5	8.7	5.9	11.7	7.8	18.8	-10.9	33.4	10.5
	May	47.5	18.1	4.1	69.7	90.35	88.42	41.57	87.01	42.92	18.01	1.69	60.62	4.4	-19.3	5.6	-3.0	6.6	12.1	11.3	8.2	11.2	-9.6	17.5	5.0
	Jun	50.5	13.9	4.6	69.1	87.72	80.49	41.91	83.20	44.32	11.20	1.93	57.45	-3.7	3.3	23.4	-0.9	6.4	11.6	9.6	6.6	2.5	15.4	35.2	6.7
	Jul	52.1	17.1	4.6	73.7	90.60	74.89	43.10	84.00	47.17	12.79	1.98	61.94	3.7	14.0	16.6	6.6	9.6	14.1	13.1	9.9	13.6	30.1	31.8	17.2
	Aug	47.3	12.6	5.0	64.9	84.44	72.90	43.84	79.05	39.92	9.20	2.21	51.33	-0.6	-10.9	17.4	-1.6	7.1	5.3	16.9	6.7	6.5	-6.2	37.2	4.9
	Sep	46.8	13.8	3.8	64.2	84.42	76.08	42.49	80.12	39.36	10.48	1.63	51.47	9.2	-10.4	9.9	4.3	9.8	-2.9	13.6	6.8	19.8	-12.9	24.9	11.4
	Oct	48.8	14.4	3.8	67.0	88.88	84.62	43.43	85.36	43.35	12.17	1.67	57.19	-2.6	-5.7	8.1	-2.7	8.6	10.3	13.9	7.3	3.9	4.1	23.1	4.4
	Nov	45.6	14.0	3.4	63.0	80.12	84.24	42.96	79.06	36.55	11.83	1.45	49.83	2.5	-13.0	-11.3	-2.2	1.9	3.8	18.2	3.0	4.4	-9.7	4.9	0.7
	Dec	46.8	8.5	3.9	59.2	77.28	80.26	42.81	75.44	36.19	6.80	1.87	44.65	3.4	-2.5	-7.6	1.7	3.5	10.8	16.3	5.4	7.0	8.0	7.4	7.2
2016	Jan	46.4	16.3	3.6	66.4	84.44	84.17	41.85	82.04	39.19	13.75	1.52	54.47	5.0	-8.9	-2.8	0.5	4.8	2.5	15.7	4.6	10.0	-7.6	12.5	5.0
	Feb	51.3	18.3	4.0	74.7	88.34	91.24	43.13	86.67	45.36	17.62	1.73	64.71	3.1	0.3	2.2	2.3	6.6	12.0	10.1	8.1	9.8	12.4	12.5	10.6
	Mar	55.8	18.3	4.6	78.6	91.01	94.66	44.19	89.14	50.78	17.30	2.01	70.09	2.4	14.5	0.9	4.9	5.3	8.6	11.7	6.4	7.9	24.2	12.7	11.6
	Apr	53.4	18.7	4.0	76.2	92.26	93.10	44.07	89.93	49.29	17.45	1.77	68.51	3.4	7.6	-7.1	3.8	4.1	11.8	6.0	6.3	7.6	20.3	-1.5	10.3
	May	50.5	20.6	4.1	75.2	87.39	93.51	44.21	93.45	49.21	19.28	1.80	70.29	6.4	13.9	0.3	8.0	7.8	5.8	6.4	7.4	14.7	20.4	6.7	16.0
	Jun	53.6	15.7	4.2	73.5	91.76	82.83	49.89	87.46	49.18	13.00	2.10	64.27	6.1	12.6	-8.8	6.4	4.6	2.9	19.0	5.1	11.0	16.1	8.5	11.9
	Jul	53.0	16.0	5.4	74.5	94.01	79.54	51.20	87.77	49.84	12.74	2.79	65.37	1.8	-6.2	18.6	1.0	3.8	6.2	18.8	4.6	5.7	-0.4	40.8	5.5
Year To Date		This Year												Percent Change (%)											
2014	Jul	47.2	18.0	3.8	69.0	80.02	76.91	37.13	76.83	37.78	13.81	1.43	53.02	5.7	3.9	-2.3	4.8	6.0	2.1	5.1	5.1	12.0	8.1	2.7	10.2
2015	Jul	50.0	17.1	4.3	71.4	86.91	82.61	40.57	83.12	43.49	14.13	1.73	59.34	6.0	-4.8	10.8	3.5	8.6	7.4	9.3	8.2	15.1	2.3	21.1	11.9
2016	Jul	52.0	17.8	4.3	74.1	91.45	88.88	45.85	88.20	47.57	15.86	1.96	65.39	3.9	4.3	0.6	3.8	5.2	7.6	13.0	6.1	9.4	12.2	13.7	10.2
Running 12 Month		This Year												Percent Change (%)											
2014	Jul	44.6	16.1	3.8	64.5	78.13	75.14	36.40	74.90	34.83	12.10	1.40	48.32	5.7	-0.3	-3.1	3.8	5.2	0.8	3.0	4.3	11.2	0.5	-0.2	8.0
2015	Jul	48.4	15.8	4.1	68.2	83.81	80.17	39.25	80.15	40.45	12.64	1.81	54.70	8.5	-2.0	6.5	5.8	7.0	6.7	7.8	7.0	16.2	4.5	14.9	13.2
2016	Jul	49.9	15.7	4.2	69.8	88.15	85.79	44.77	85.03	44.01	13.44	1.88	59.31	3.2	-0.7	1.7	2.2	5.4	7.0	14.0	6.1	8.8	6.3	15.9	8.4

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Average Daily Rate (ADR)

Room revenue divided by rooms sold, displayed as the average rental rate for a single room.

Census (properties and rooms)

The number of properties and rooms that exist in our database for the area(s) or segment(s) shown on the report.

Country

A geographic area that has internationally recognized boundaries, an organized economy, and a sovereign government with external recognition. It is typically recognized by the International Organization for Standardization (ISO).

Custom Segments

Defined by a + at the end of the segment name. If a custom segment is based on a selected group of properties, new properties that come into the area will NOT automatically be added to this segment. The new property can be added alone as long as it has no more than five months of data. Once the property has six or more months of data it is considered an established property, requiring a two property change (add one/drop one or add two).

Demand (Rooms Sold)

The number of rooms sold or rented (excludes complimentary rooms).

Exchange Rate

The factor used to convert revenue from U.S. Dollars to the local currency. The exchange rate data is obtained from Oanda.com. Any aggregated number in the report (YTD, Running 3 month, Running 12 month) uses the exchange rate of each relative month when calculating the data.

Index

Index (Occupancy, ADR, RevPar) - Property performance divided by competitive set performance multiplied by 100. Internationally, indexes are also referred to as MPI - Market Penetration Index (Occupancy Index), ARI - Average Rate Index (ADR Index), and RGI - Revenue/RevPAR Generation Index (RevPAR Index).

Market

A geographic area within a country. Markets are defined by STR and STR Global.

Occupancy (Occ)

Rooms sold divided by rooms available multiplied by 100. Occupancy is always expressed as a percentage of rooms occupied.

Percent Change

Amount of growth - up, flat, or down - this period versus same period last year (month or year-to-date). Calculated as $((TY - LY) / LY) * 100$.

Revenue (Room Revenue)

Total room revenue generated from the sale or rental of rooms.

RevPAR (Revenue Per Available Room)

Room revenue divided by rooms available.

Sample or % Room Participants

The percent of rooms from which STR receives data. Calculated as $(\text{Sample Rooms} / \text{Census Rooms}) * 100$.

Sub-Market

A geographic sub-area within a Market. Sub-markets are defined by STR and STR Global.

Supply (Rooms Available)

The number of rooms times the number of days in the period.

Twelve Month Moving Average

Measures (Occ, ADR, RevPAR, Supply, Demand, Revenue) are calculated using the sum of the values of the given month and of the preceding eleven months.

W (Weekday)

Average of Sunday through Thursday

WE (Weekend)

Average of Friday and Saturday

Year-to-date

Measures (Occ, ADR, RevPAR, Supply, Demand, Revenue) are calculated using the sum of the values from January 1 of the given year.

STR Report Metrics (Duval County Lodging Industry) - continued
Competitive Cities

<u>Calendar YTD Stats</u>	<u>Occ %</u>		<u>ADR</u>		<u>RevPar</u>	
	<u>2017</u>	<u>2016</u>	<u>2017</u>	<u>2016</u>	<u>2017</u>	<u>2016</u>
Arlington	77.0%	75.0%	\$80.94	\$73.07	\$62.33	\$54.79
Beaches	78.1%	75.5%	\$136.56	\$131.88	\$106.67	\$99.51
Downtown	70.5%	67.8%	\$130.74	\$127.41	\$92.15	\$86.4
Northside/Airport	73.5%	70.6%	\$83.21	\$78.39	\$61.14	\$55.37
Southside/Mandarin	75.3%	74.6%	\$83.79	\$78.95	\$63.09	\$58.86
Westside	80.2%	78.2%	\$72.60	\$68.19	\$58.22	\$53.33

2. Visit Jacksonville Group Sales Productivity (Fiscal YTD) - 6 months

<u>Contract/Booked</u>	<u>Quarterly Room</u>	<u>Quarterly Room</u>
<u>Room Nights</u>	<u>Night Goal</u>	<u>Night Performance</u>
29,339 RN's*	49,548 RN's	59.2%

* RN's booked less RN's cancelled equates to adjusted total.

Services Definites (new metric)

88 groups, 6,259 RN's

Tracking of Prior Years Repeat Bookings (new data request)

25 Groups were Repeat Bookings, there were 77 Group Bookings turned Definite for the first two quarters.

See list of groups booked in -2nd QTR 2016-2017 (Attached)

Visit Jacksonville
President's Report to the TDC
Thursday, 5.18.17
2nd Quarter YTD 2016/2017 Performance Metrics

1. STR Report Metrics Duval County Lodging Industry (Calendar YTD 2017) – 3 months

<u>Occupancy %</u>	<u>2017 1st QTR</u>	<u>Rolling 12 Months</u>
This Year	74.6%	71.8%
Last Year	73.1%	68.6%
Percent Change	2.1%	4.6%

<u>Average Daily Rate</u>	<u>2017 1st QTR</u>	<u>Rolling 12 Months</u>
This Year	\$91.25	\$89.10
Last Year	86.19\$	\$83.24
Percent Change	+5.9%	+7.0%

<u>Revenue Per Available Room (RevPar)</u>	<u>2017 1st QTR</u>	<u>Rolling 12 Months</u>
This Year	\$68.12	\$63.94
Last Year	\$63.03	\$57.11
Percent Change	+8.1%	+11.9%

<u>Number of Rooms Sold (demand)</u>	<u>2017 1st QTR</u>	<u>Rolling 12 Months</u>
This Year	1,208,517 RN's	4,703,638RN's
Last Year	1,181,256 RN's	4,496,086RN's
Percent Change	2.3%	4.6%
	27,261 RN's Total	207,552 RN's Total
	+303 RN's /day	+ 567 RN's /day

<u>Total Jacksonville Rooms Revenue</u>	<u>2017 1st QTR</u>	<u>Rolling 12 Months</u>
This Year	\$110,278,328	\$419,087,203
Last Year	\$101,815,087	\$374,254,829
Percent Change	8.3%	12.0%
	\$8,463,241	\$44,832,374
	+\$94,036/day	+ \$122,828 /day

Tab 11 - Seg Trend Duval County, FL

Visit Jacksonville
For the Month of July 2016

Currency: USD - US Dollar

Current Month	This Year												Percent Change (%)												
	Occupancy (%)				ADR				RevPAR				Occupancy (%)				ADR (%)				RevPAR (%)				
	Trans.	Grp.	Con.	Total	Trans.	Grp.	Con.	Total	Trans.	Grp.	Con.	Total	Trans.	Grp.	Con.	Total	Trans.	Grp.	Con.	Total	Trans.	Grp.	Con.	Total	
2015	Feb	49.8	19.3	3.9	73.0	82.91	81.43	39.18	80.17	41.30	15.68	1.54	58.51	7.8	-6.0	12.0	4.0	9.1	-1.1	4.9	5.6	17.7	-7.0	17.5	9.9
	Mar	54.5	16.0	4.5	76.0	85.42	87.23	39.55	83.77	47.08	13.92	1.79	62.80	8.0	-10.4	6.4	3.4	11.7	8.6	7.8	10.7	20.6	-2.6	14.8	14.4
	Apr	51.7	17.4	4.3	73.4	88.67	83.29	41.59	84.62	45.81	14.51	1.80	62.11	9.3	-15.9	19.4	2.5	8.7	5.9	11.7	7.8	18.8	-10.9	33.4	10.5
	May	47.5	18.1	4.1	69.7	90.35	88.42	41.57	87.01	42.92	16.01	1.69	60.62	4.4	-19.3	5.6	-3.0	6.6	12.1	11.3	8.2	11.2	-9.6	17.5	5.0
	Jun	50.5	13.9	4.6	69.1	87.72	80.49	41.91	83.20	44.32	11.20	1.93	57.45	-3.7	3.3	23.4	-0.9	6.4	11.6	9.6	6.6	2.5	15.4	35.2	5.7
	Jul	52.1	17.1	4.6	73.7	90.60	74.89	43.10	84.00	47.17	12.79	1.98	61.94	3.7	14.0	16.6	6.6	9.6	14.1	13.1	9.9	13.6	30.1	31.8	17.2
	Aug	47.3	12.6	5.0	64.9	84.44	72.90	43.84	79.05	39.92	9.20	2.21	51.33	-0.6	-10.9	17.4	-1.6	7.1	5.3	16.9	8.7	6.5	-6.2	37.2	4.9
	Sep	46.6	13.8	3.8	64.2	84.42	78.08	42.49	80.12	39.36	10.48	1.63	51.47	9.2	-10.4	9.9	4.3	9.8	-2.9	13.6	6.8	19.8	-12.9	24.9	11.4
	Oct	48.8	14.4	3.8	67.0	88.88	84.82	43.43	85.36	43.35	12.17	1.67	57.19	-2.6	-5.7	8.1	-2.7	6.6	10.3	13.9	7.3	3.9	4.1	23.1	4.4
	Nov	45.6	14.0	3.4	63.0	80.12	84.24	42.96	79.06	36.55	11.83	1.45	49.83	2.5	-13.0	-11.3	-2.2	1.9	3.8	18.2	3.0	4.4	-9.7	4.9	0.7
	Dec	46.8	8.5	3.9	59.2	77.28	80.26	42.81	75.44	36.19	6.80	1.67	44.65	3.4	-2.5	-7.6	1.7	3.5	10.8	16.3	5.4	7.0	8.0	7.4	7.2
2016	Jan	48.4	16.3	3.6	66.4	84.44	84.17	41.85	82.04	39.19	13.75	1.52	54.47	5.0	-9.9	-2.8	0.5	4.8	2.5	15.7	4.5	10.0	-7.6	12.5	5.0
	Feb	51.3	18.3	4.0	74.7	88.34	91.24	43.13	86.67	45.36	17.62	1.73	64.71	3.1	0.3	2.2	2.3	6.6	12.0	10.1	8.1	9.8	12.4	12.5	10.6
	Mar	55.8	18.3	4.6	78.6	91.01	94.66	44.19	89.14	50.78	17.30	2.01	70.09	2.4	14.5	0.9	4.9	5.3	8.5	11.7	6.4	7.9	24.2	12.7	11.6
	Apr	53.4	18.7	4.0	76.2	92.26	93.10	44.07	89.93	49.29	17.45	1.77	68.51	3.4	7.6	-7.1	3.8	4.1	11.8	6.0	6.3	7.6	20.3	-1.5	10.3
	May	50.5	20.6	4.1	75.2	97.39	93.51	44.21	93.45	49.21	18.28	1.80	70.29	6.4	13.9	0.3	8.0	7.8	5.8	6.4	7.4	14.7	20.4	6.7	16.0
	Jun	53.6	15.7	4.2	73.5	91.76	82.83	49.89	87.46	49.18	13.00	2.10	64.27	6.1	12.8	-8.8	6.4	4.6	2.9	19.0	5.1	11.0	16.1	8.5	11.9
	Jul	53.0	16.0	5.4	74.5	94.01	79.54	51.20	87.77	49.84	12.74	2.79	65.37	1.8	-6.2	16.6	1.0	3.8	6.2	16.8	4.5	5.7	-0.4	40.8	5.5
Year To Date													Percent Change (%)												
2014	Jul	47.2	18.0	3.8	69.0	80.02	76.91	37.13	76.83	37.78	13.81	1.43	53.02	5.7	3.9	-2.3	4.8	6.0	2.1	5.1	5.1	12.0	6.1	2.7	10.2
2015	Jul	50.0	17.1	4.3	71.4	86.91	82.61	40.57	83.12	43.49	14.13	1.73	59.34	6.0	-4.8	10.8	3.5	8.6	7.4	9.3	8.2	15.1	2.3	21.1	11.9
2016	Jul	52.0	17.8	4.3	74.1	91.45	88.88	45.85	88.20	47.57	15.86	1.96	65.39	3.9	4.3	0.6	3.8	5.2	7.6	13.0	6.1	9.4	12.2	13.7	10.2
Running 12 Month													Percent Change (%)												
2014	Jul	44.8	16.1	3.8	64.5	78.13	75.14	36.40	74.90	34.83	12.10	1.40	48.32	5.7	-0.3	-3.1	3.6	5.2	0.8	3.0	4.3	11.2	0.5	-0.2	8.0
2015	Jul	48.4	15.6	4.1	68.2	83.81	80.17	39.25	80.15	40.45	12.64	1.61	54.70	8.5	-2.0	6.5	5.6	7.0	6.7	7.8	7.0	16.2	4.5	14.9	13.2
2016	Jul	49.9	15.7	4.2	69.8	88.15	85.79	44.77	85.03	44.01	13.44	1.86	59.31	3.2	-0.7	1.7	2.2	5.4	7.0	14.0	6.1	8.8	6.3	15.9	8.4

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Average Daily Rate (ADR)

Room revenue divided by rooms sold, displayed as the average rental rate for a single room.

Census (properties and rooms)

The number of properties and rooms that exist in our database for the area(s) or segment(s) shown on the report.

Country

A geographic area that has internationally recognized boundaries, an organized economy, and a sovereign government with external recognition. It is typically recognized by the International Organization for Standardization (ISO).

Custom Segments

Defined by a + at the end of the segment name. If a custom segment is based on a selected group of properties, new properties that come into the area will NOT automatically be added to this segment. The new property can be added alone as long as it has no more than five months of data. Once the property has six or more months of data it is considered an established property, requiring a two property change (add one/drop one or add two).

Demand (Rooms Sold)

The number of rooms sold or rented (excludes complimentary rooms).

Exchange Rate

The factor used to convert revenue from U.S. Dollars to the local currency. The exchange rate data is obtained from Oanda.com. Any aggregated number in the report (YTD, Running 3 month, Running 12 month) uses the exchange rate of each relative month when calculating the data.

Index

Index (Occupancy, ADR, RevPar) - Property performance divided by competitive set performance multiplied by 100. Internationally, indexes are also referred to as MPI - Market Penetration Index (Occupancy Index), ARI - Average Rate Index (ADR Index), and RGI - Revenue/RevPAR Generation Index (RevPAR Index).

Market

A geographic area within a country. Markets are defined by STR and STR Global.

Occupancy (Occ)

Rooms sold divided by rooms available multiplied by 100. Occupancy is always expressed as a percentage of rooms occupied.

Percent Change

Amount of growth - up, flat, or down - this period versus same period last year (month or year-to-date). Calculated as $((TY - LY) / LY) * 100$.

Revenue (Room Revenue)

Total room revenue generated from the sale or rental of rooms.

RevPAR (Revenue Per Available Room)

Room revenue divided by rooms available.

Sample or % Room Participants

The percent of rooms from which STR receives data. Calculated as $(\text{Sample Rooms} / \text{Census Rooms}) * 100$

Sub-Market

A geographic sub-area within a Market. Sub-markets are defined by STR and STR Global.

Supply (Rooms Available)

The number of rooms times the number of days in the period.

Twelve Month Moving Average

Measures (Occ, ADR, RevPAR, Supply, Demand, Revenue) are calculated using the sum of the values of the given month and of the preceding eleven months.

W (Weekday)

Average of Sunday through Thursday

WE (Weekend)

Average of Friday and Saturday

Year-to-date

Measures (Occ, ADR, RevPAR, Supply, Demand, Revenue) are calculated using the sum of the values from January 1 of the given year.

Visitor Industry 5 Year Aspirational Plan

Objective: To grow the economic contribution of the visitor industry for the future prosperity of Jacksonville

2020 Goal:

To rank within the top five (5) destinations identified as our competitive set based on STR Metrics.

Performance Measures:

1. Communities we need to measure ourselves against. Current rankings:

- | | | | |
|------------------|---------------|-------------------|----------------|
| 1) Austin | 6) Baltimore | 11) Lexington | 16) Birmingham |
| 2) Nashville | 7) Charlotte | 12) Daytona Beach | |
| 3) Orlando | 8) Atlanta | 13) Memphis | |
| 4) Tampa/St Pete | 9) Louisville | 14) Columbia | |
| 5) Savannah | 10) Ft Worth | 15) Jacksonville | |

2. Important STR rankings goals

- Have an annual hotel occupancy for Duval County of **70%** - **Currently 66%**
- Average Hotel Room Rate **\$90.25** – **Currently \$ 80.00**
- Annual bed tax collections to exceed **\$25** million for Duval County - **Currently \$18 million**
- 65,000** jobs supported by the visitor industry - **Currently 53,000**

3. Independent Research to measure goal results:

- Welcome over **12 million** overnight visitors to Jacksonville annually – **Currently 9.7 million**
- Grow our group business to **1,200** conferences annually. – **Currently 966**
- Be considered a top Southeastern destination for multi-hotel group and convention business by hosting over **50** events annually. **Currently 20**
- Visitors to Duval County generate over **\$4 billion** dollars in business sales annually - **Currently \$3.2 billion**

Keys to Success:

- Engaging our Community
- Collaboratively establishing our Jacksonville brand essence
- Building our image nationally and internationally
- Making Jacksonville a more attractive experience for visitors
- Establishing a destination development plan
 - Attractions
 - Arts & Culture
 - Sports

- d. Retail
- e. Dining & Nightlife
- f. Air Service Expansion
- g. Community Infrastructure
 - Connectivity
 - Facilities
 - Strategic Hotel Development
 - Multi Purpose Convention Center Development
- h. Wayfinding Signage

Major Initiatives Required:

1. Engaging the Jacksonville community in promoting our destination globally
2. Enhancing the tourism ambassador program
3. Defining the brand essence for the city of Jacksonville that is integrated into every business' planning and marketing
4. Transforming Jacksonville into a collaborative/visionary community
5. Creating alluring vacation experiences
6. Investing in enhancements that will benefit both visitors and the quality of life of the local citizens
7. Identifying a dedicated sales and marketing revenue source
8. Maintaining a dedicated research program for:
 - a. Customer satisfaction (Customer Advisory Council)
 - b. Visitor Industry Economic Contribution Progress (Oxford Economics)
9. Growing Partnership efficiencies to advance the visitor industry contribution to the Jacksonville economy.