Tourist Development Council Potential Research Projects:

Consumer Intercept Surveys, Visitor Profile, Destination Ratings, Visitor Volumes:

- MMGY Global
- UNF Public Opinion Research Laboratory Intercept Surveys
- UF Tourism Institute Visitor Intercept Surveys
- DK Shifflet

Advertising Effectiveness & Brand Awareness

SMARInsights

Meetings Market Research:

CBRE

Other potential research projects if funds are available:

- AirDNA Solutions
- AllTheRooms Analytics Reports

Consumer Intercept Surveys, Visitor Profile, Destination Ratings, Visitor Volume Options:

MMGY Global - Consumer Survey (\$22,500)

Conduct a consumer survey of 400 past and 400 prospective Jacksonville visitors. Respondents will reside in Jacksonville's top origin markets (to be determined by Visit Jacksonville).

- Past visitors will be defined as those who have vacationed in Jacksonville in the past three years for reasons other than visiting family or friends.
- Prospective visitors will be defined as those who have not vacationed in Jacksonville but are interested in visiting during the next two years.

Survey topics for each group will include but are not limited to:

METHODOLOGY

PROSPECTIVE VISITORS
Perception of Jacksonville as a vacation destination Reason for not having visited in the past Awareness of destination activities and offerings Likelihood of visiting and when Time of year interested in visiting Activities interested in participating in Likely travel party composition Likely length of stay Demographic information

(Examples of this study have been requested)

UNF Public Opinion Research Laboratory Intercept Surveys (Price dependent on the volume of surveys requested monthly)

We have worked previously with the University of North Florida on similar studies in the past. They could design a survey to gather tourists' experiences after exiting local tourism attractions and things to do, etc. The surveys could also include visitor spending and demographics in the questionnaires to develop a more detailed study.

UF Eric Friedheim Tourism Institute (about \$1000 monthly plus additional to have staff out polling at attractions)

Visit Jacksonville has worked with the University of Florida over the last couple of years to conduct a Visitor Center Study. On-site interviews were conducted of visitors to a visitor center using a brief questionnaire that was administered by visitor center staff. Surveys were conducted (using both paper-based questionnaires and questionnaires administered by iPads). This study collects customer data within a visitor center and sends visitors a follow-up survey on their experience and their trip activities and spending. (study attached) With this study we could expand and send survey takers out to ask visitors at some of Duval's biggest attractions (i.e. the beach areas, zoo, St Johns Town Center, sporting events, etc.) to make sure we are getting a true feel of the visitors and their visitation spots, spending, etc. (Longwood's and all visitor profiles depend on panels of people and most skew towards leisure/transient. We are likely not hearing from the "Bleisure"- combined business/leisure guests, etc.).

Visit Jacksonville Report SMART Jacksonville Quarter 4, 2016



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art 2: Follow-up Email Survey Results	
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Trip Planning Process 4	-5
Decision Making and Influence 6	2

Methodology

On-site interviews were conducted of visitors to the Jacksonville Visitor Centers using a brief questionnaire that was administered by Jacksonville Visitor Center staff. A total of 8 surveys were collected (using both paper based questionnaires and questionnaires administered via iPads) during the fourth quarter of 2016. An in-depth follow-up survey was also sent to those visitors that provided an email address to Visit Jacksonville using the Qualtrics online survey platform. A total of 1,317 valid emails were collected during the fourth quarter of 2016. Between January 20, 2017 and January 30, 2017 there were 172 survey responses collected (13.1% response rate.)

		1Q2016	2Q2106	3Q2016	4Q2016	Total
Inte Sample Size	Intercept Survey	260	41	33	8	342
	Email Survey	129	- 80	160	172	541

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Executive Summary

Part 1: Visitor Intercept Survey (Year end summary)

- Most visitor center visitors are in the area for vacation/leisure (43.1%) followed by those visiting family/friends (18.2%) and attending a festival/sporting/special event (18.2%)
- · About 94% of visitors are overnight stays and visitors stay an average of 5 nights
- The average party size for visitors is about 3 people
- Over ²/₃ of visitor center visitors are true visitors to Jacksonville
- About ¹/₃ of total visitor center visitors are Florida residents

Part 2: Online Survey

Visitor Profile

- 78.3% of visitors live outside of Jacksonville
- Baby Boomers (41%) and Generation X (33%) are the largest generations of visitors and account for about ³/₄ of online survey responses
- About $\frac{2}{3}$ (64.9%) of visitors have household incomes of \$50,000 or more annually
- The highest yielding visitors (in terms of dollars spent per person per day) are those who have visited 2 times and do not plan to return

Trip Characteristics

- Over half of travel parties are either a single traveler (20%) or a couple (33%)
- Most trips are overnight stays (76.3%)
- Over ³/₄ of visitors stay in a hotel/motel/resort/B&B (61%) or with family/friends (26%)
- Per trip, visitors spend the most money on accommodations (\$418) followed by Food and Beverage (\$193)
- The most visitor satisfaction is found with events (87%) and the least is found with transportation (57%)

Executive Summary

Places Visited

- Over the course of their trip, visitors go to an average of 3 major attractions within the Jacksonville area
 - Of these visits, 58% are pre-planned
- The most visited Jacksonville attractions are the Jacksonville Beaches (54%), St. Johns Town Center (38%), and St. Johns Riverwalk (24%)

Trip Planning Process

- A little over half (56%) of visitors recall seeing Visit Jacksonville advertisements
- Destination ads scored highest in attractiveness (solid '1') and scored lowest in accuracy & trustworthiness (0.6)
- Visitors mainly use a laptop (58%) or desktop computer (57%) to plan before their trip, but mainly use a smartphone (61%) during their trip
- Visitors use on average 5.1 online sources before traveling and 2.1 online sources during their trip
- Visitors use on average 3.2 offline sources before traveling and 1.9 offline sources during their trip

Decision Making & Influence

- · Visitors use about twice as much Visit Jacksonville material before their trip than during
- Visit Jacksonville has the highest level of influence in what attractions visitors visit (37%)
- Visit Jacksonville has the lowest level of influence in visitors' decision on whether or not to visit
 Jacksonville (37%)

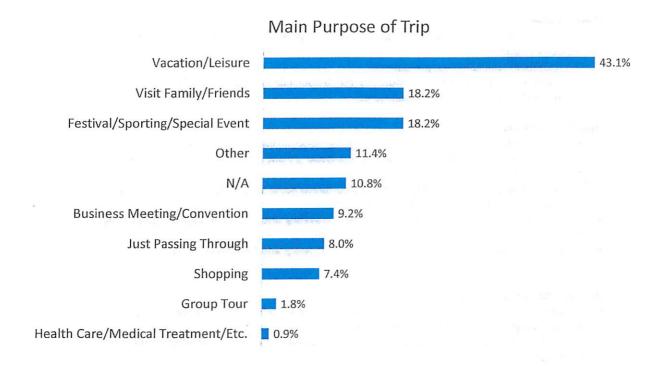
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Part 1: Visitor Center Intercept Survey 2016 Summary



Trip Details: 2016 Summary

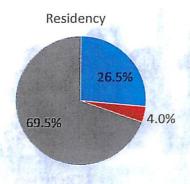


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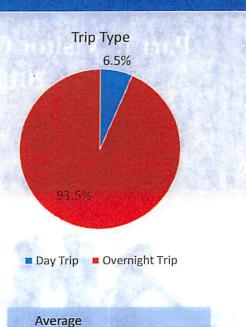
7

Visitor Demographics: 2016 Summary

Age Range	Average Number of People in Travel Party
17 or younger	0.3
18-64	2.0
65 or older	0.4
Total	2.7



■ Full-Time Resident ■ Part Time Resident ■ Not a Resident



5.0

Number of

Nights Spent in Jacksonville

Origin of Domestic Visitors: 2016 Summary



- Pensacia Proper Talla Ossee Jan Talla Ossee Original Reach
 Original Reach
- dwin

 Orange Pant

 Lakesid

 Green Cove (Ba)

 Green Cove (Ba)

 Green Cove (Ba)

 Tributantic Beach

 Atlantic Beach

 Allantic Beach

 Green Cove (Ba)

 Tributantic Beach

 Atlantic Beach

 Green Cove (Ba)

 Tributantic Beach

 Atlantic Beach

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- 84.8% of visitors are from the U.S.
- 41.9% of those U.S. visitors are from Florida



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Origin of International Visitors: 2016 Summary



- 15.2% of those visiting the visitor center are from a country other than the U.S.
- The colored markers represent percentages of international visitors by country









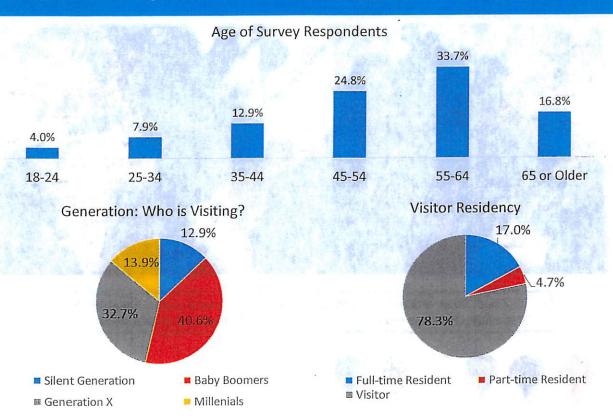




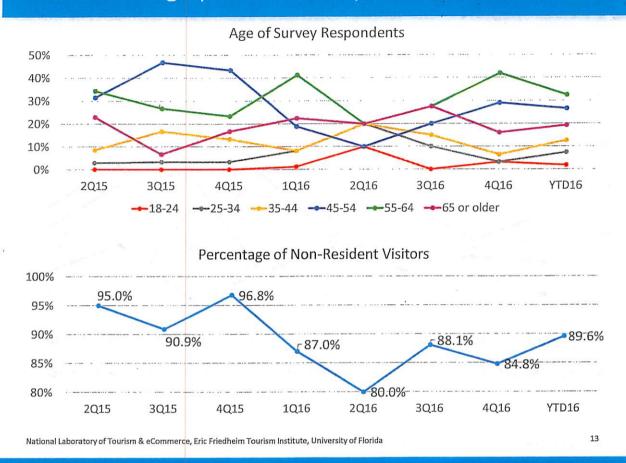
Part 2: Follow-Up Survey Visitor Profile



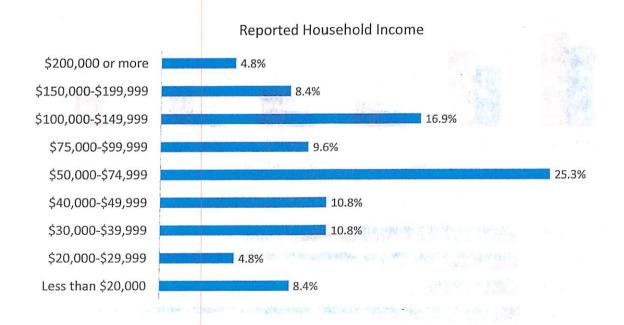
Visitor Demographics: Quarter 4, 2016



Visitor Demographics: Quarterly Trends

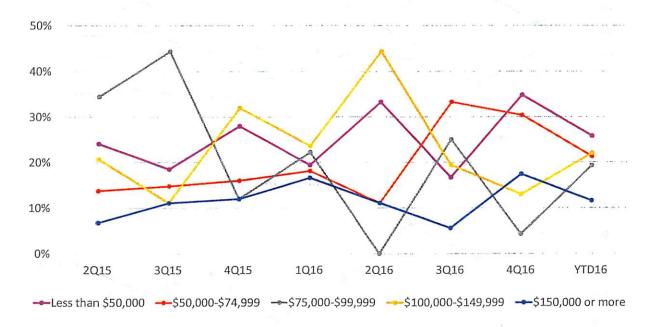


Visitor Demographics: Quarter 4, 2016



Visitor Demographics: Quarterly Trends

Reported Household Income

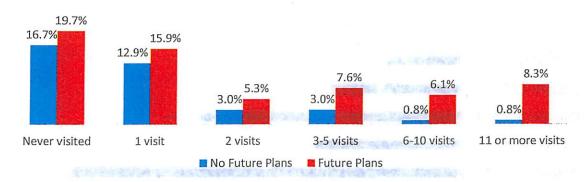


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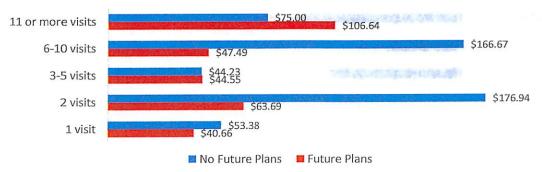
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Visitor Stages & Spending: Quarter 4, 2016

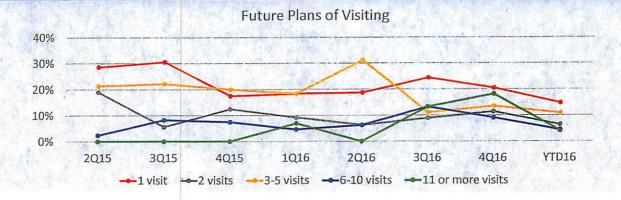
Previous/Future Visit Trends



Average Total Spending Per Person Per Day



Visitor Stages: Quarterly Trends

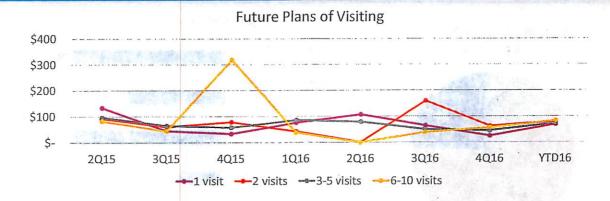


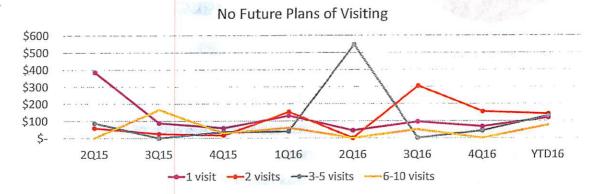
No Future Plans of Visiting 40% 30% 20% 10% 0% 4Q16 YTD16 2Q15 3Q15 4Q15 1Q16 2Q16 3Q16 1 visit -2 visits -3-5 visits -11 or more visits 6-10 visits

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Total Spent Per Person Per Day: Quarterly Trends

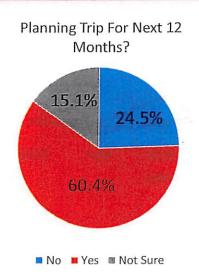




Part 2: Follow-Up Survey Trip Characteristics



Trip Planning: Quarter 4, 2016

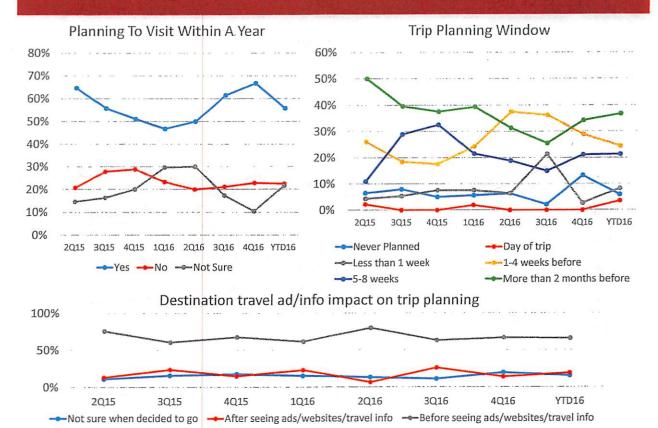




Destination travel ad/info impact on trip planning

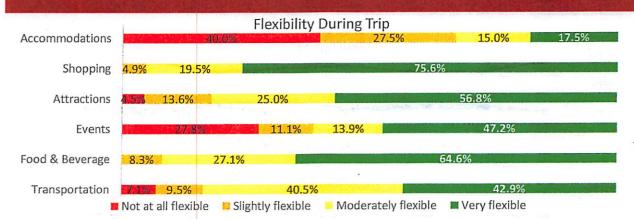


Trip Planning: Quarterly Trends

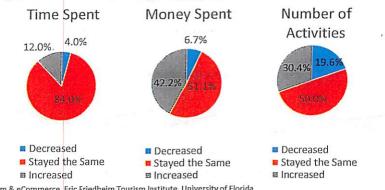


Trip Plans- Flexibility: Quarter 4, 2016

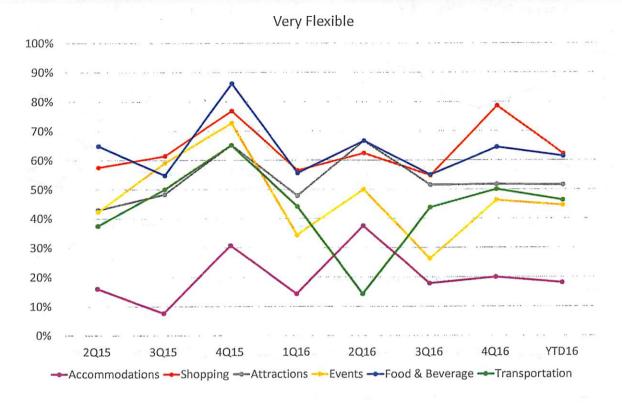
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How did visitors actually change aspects of their trip during their trip?



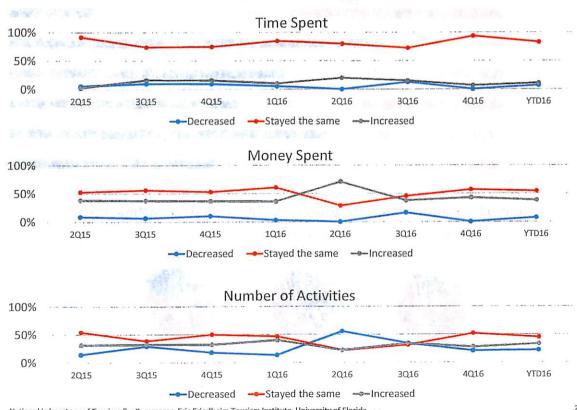
Trip Plans- Flexibility: Quarterly Trends



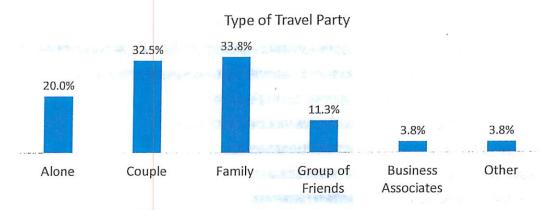
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Trip Plans-Change During Trip: Quarterly Trends



Travel Parties- What do they look like?: Quarter 4, 2016

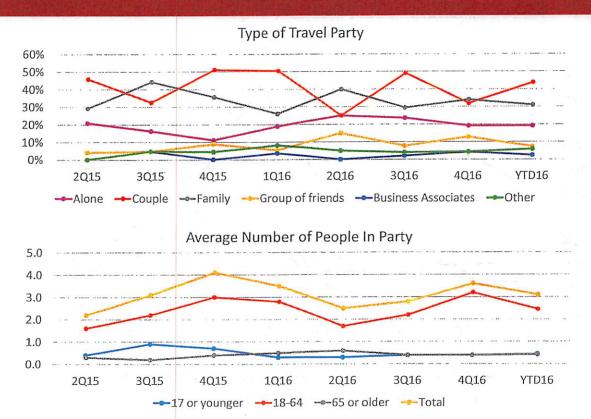


Age Range	Average Number of People in Party
17 or younger	0.5
18-64	2.8
65 or older	0.3
Total	3.4

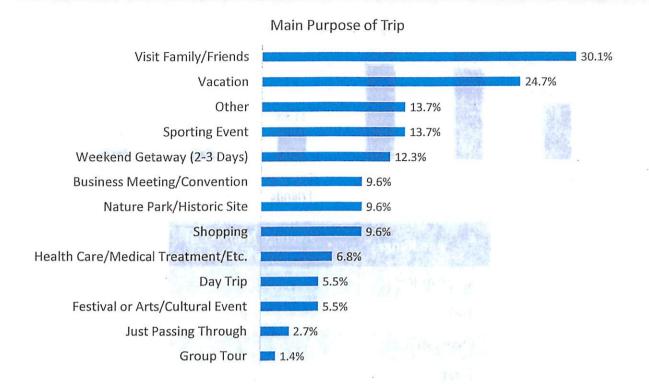
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Travel Parties- What do they look like?: Quarterly Trends



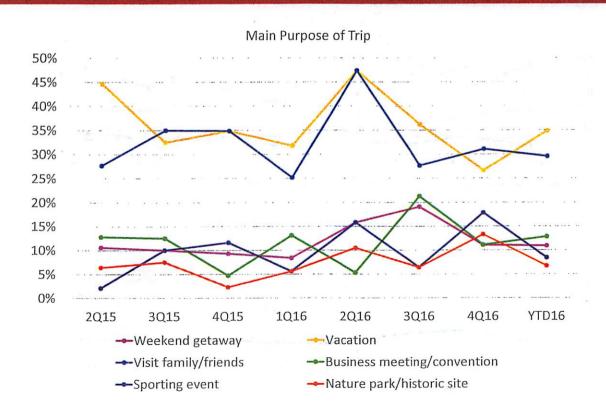
Trip Purpose: Quarter 4, 2016



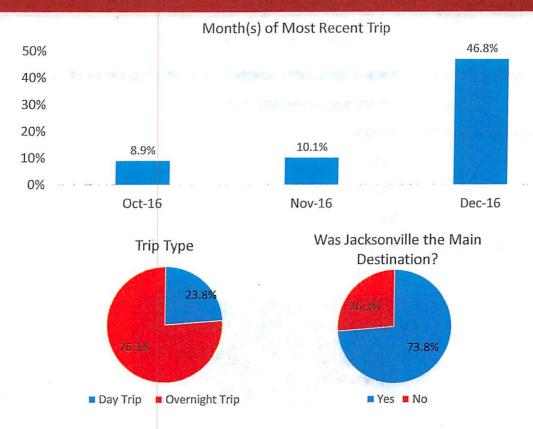
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Trip Purpose: Quarterly Trends



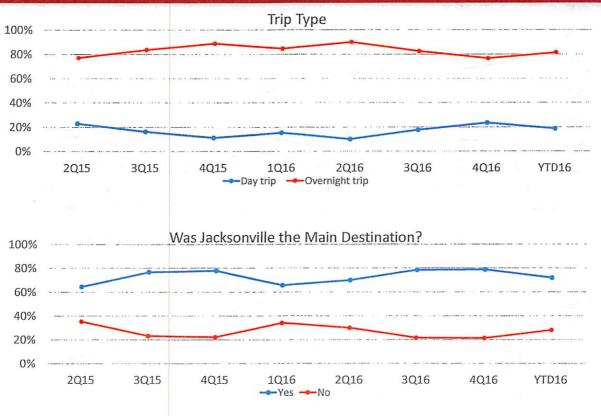
Most Recent Trip: Quarter 4, 2016



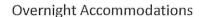
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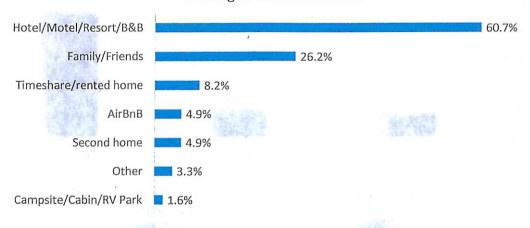
29

Most Recent Trip: Quarterly Trends



Overnight Trips: Quarter 4, 2016





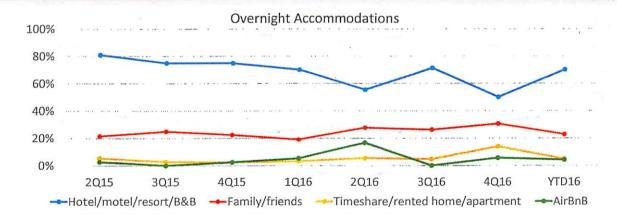
Average Number of Nights Spent in Jacksonville Per Overnight Visit:

14.6

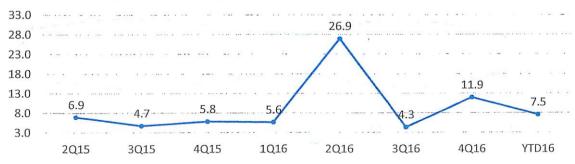
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Overnight Trips: Quarterly Trends



Average Number of Nights Spent In Jacksonville Per Overnight Visit



Trip Spending: Quarter 4, 2016

What types of trips generate the most money?

	Day Trip	Overnight Trip	Average Total	
Total Spent Per Person Per Day:	\$48	\$70	\$65	

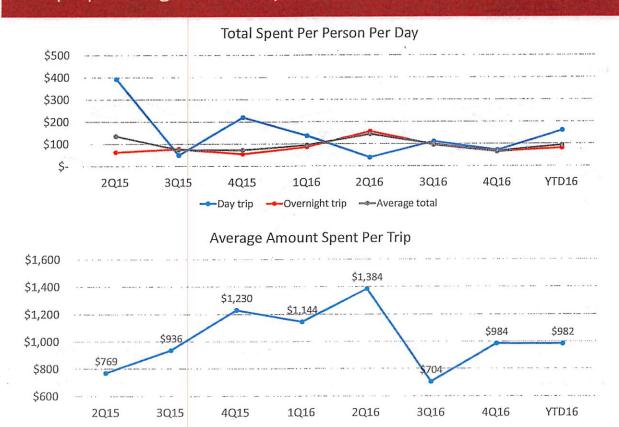
What are visitors spending money on?

Category	Average Amount Spent per Trip
Accommodations	\$418
Shopping	\$92
Attractions	\$52
Events	\$27
Food & Beverage	\$193
Transportation	\$44
Miscellaneous/Other	\$19
Total:	\$839

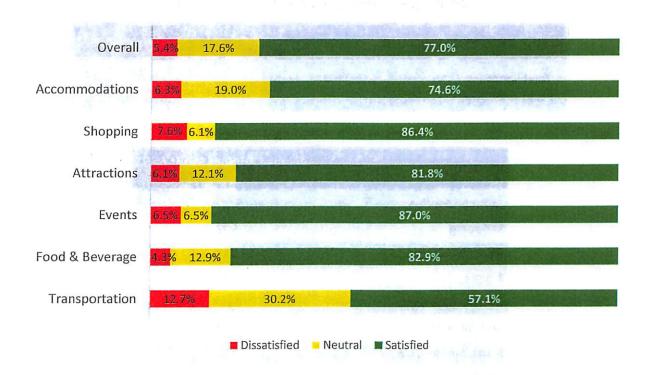
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Trip Spending: Quarterly Trends



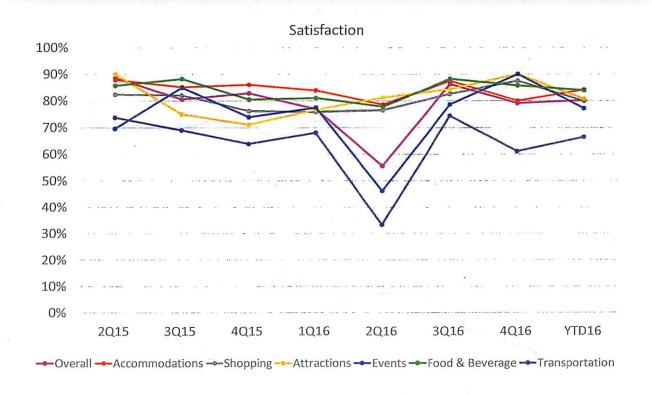
Trip Satisfaction: Quarter 4, 2016



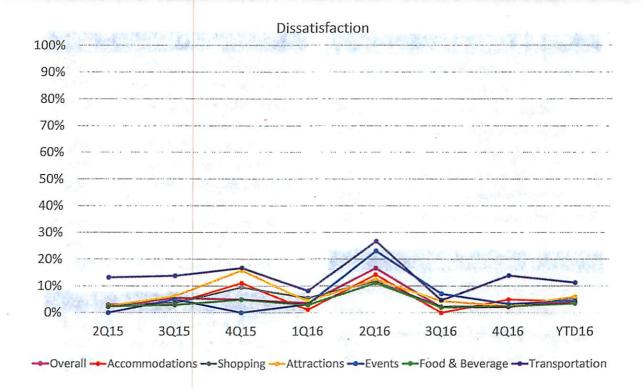
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Trip Satisfaction: Quarterly Trends



Trip Satisfaction: Quarterly Trends



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Part 2: Follow-Up Survey

Places Visited



Key Places Visited: Total % of Visits: Quarter 4, 2016

	4.50, 1.11, 2.1
Nature & Parks	
Jacksonville Beaches	54.4%
St. Johns Riverwalk	23.5%
Kathryn Abbey Hanna Park	14.7%
Jacksonville Arboretum & Gardens	8.8%
Hemming Park	8.8%
Little Talbot Island State Park	7.4%
Big Talbot Island State Park	5.9%
Fort George Island State Park	2.9%

Museums	
Cummer Museum of Art & Gardens	11.8%
Museum of Science & History	8.8%
Museum of Contemporary Art Jacksonville	5.9%
Ritz Theatre & Museum	5.9%

Sights & Landmarks		
Jacksonville Zoo & Gardens	14.7%	
Jacksonville Veterans Memorial Arena	11.8%	
Fort Caroline National Memorial	10.3%	
Everbank Field	10.3%	
Friendship Fountain	8.8%	
Kingsley Plantation House	5.9%	
Veterans Memorial Wall	4.4%	
Florida Theatre	2.9%	
Catty Shack Ranch	2.9%	
Autobahn	1.5%	
Jacksonville National Cemetery	0.0%	

Shopping & Dining	
St. Johns Town Center	38.2%
Riverside/Avondale Neighborhoods	20.6%
The Avenues	17.7%

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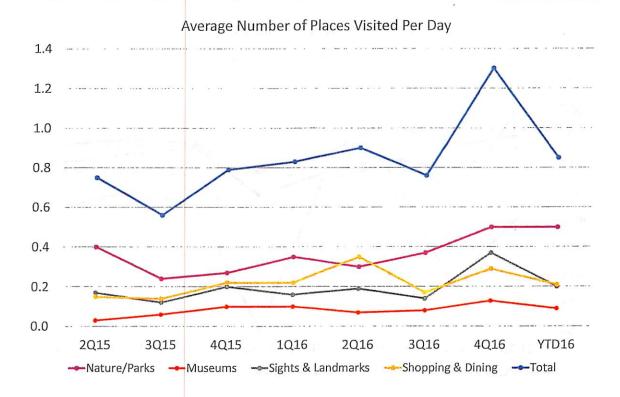
Key Places Visited - Summary: Quarter 4, 2016





Type of Activity	Average Satisfaction Score (-1 to +1 scale)
Nature & Parks	.82
Museums	.58
Sights & Landmarks	.88
Shopping & Dining	.89
All	.78

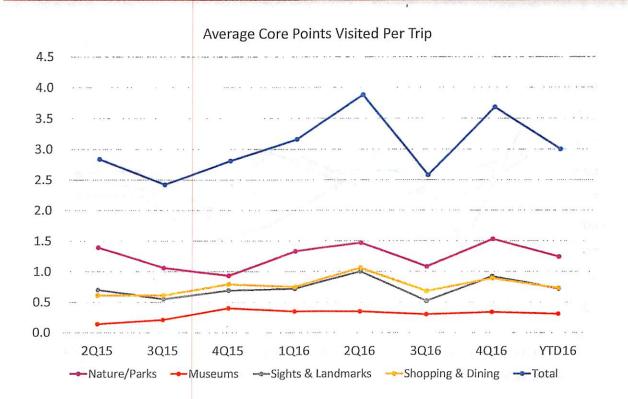
Places Visited per Day - Overall: Quarterly Trends



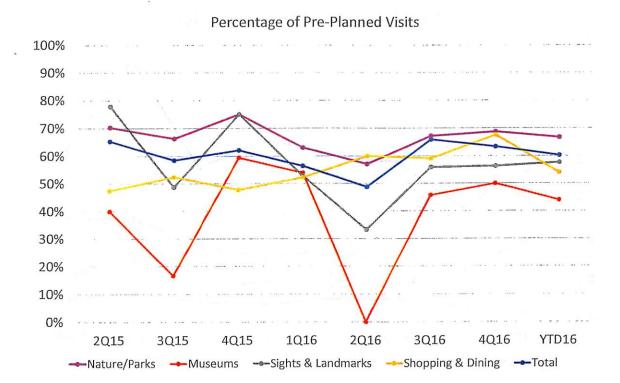
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Places Visited per Trip - Overall: Quarterly Trends



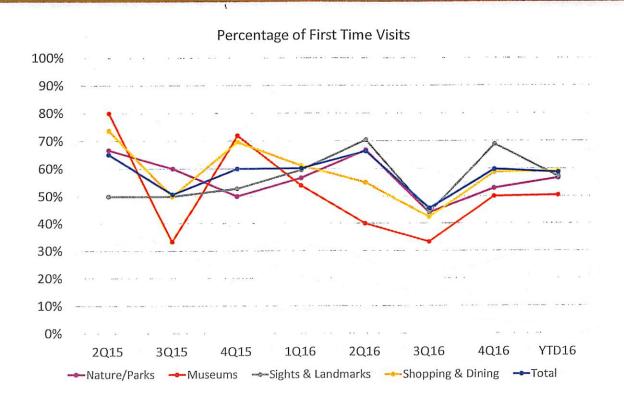
Pre-planned Visits: Quarterly Trends



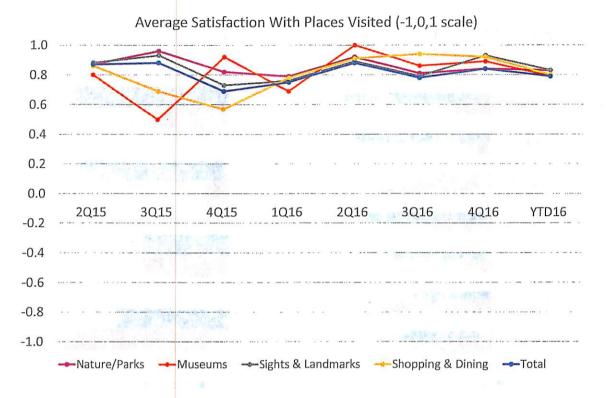
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First Time Visits: Quarterly Trends



Satisfaction with Places Visited: Quarterly Trends



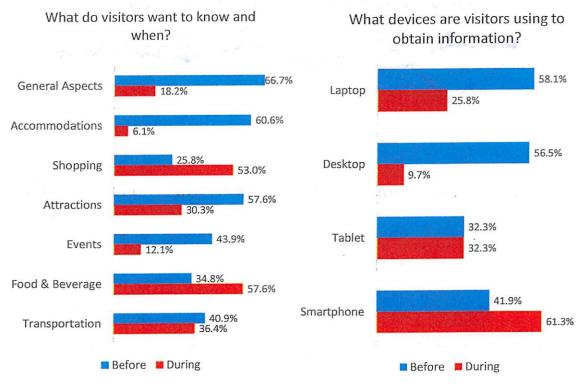
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Part 2: Follow-Up Survey Trip Planning Process



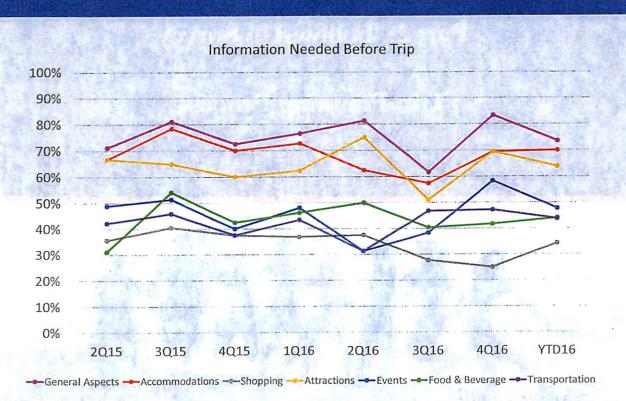
Information Needs: Quarter 4, 2016



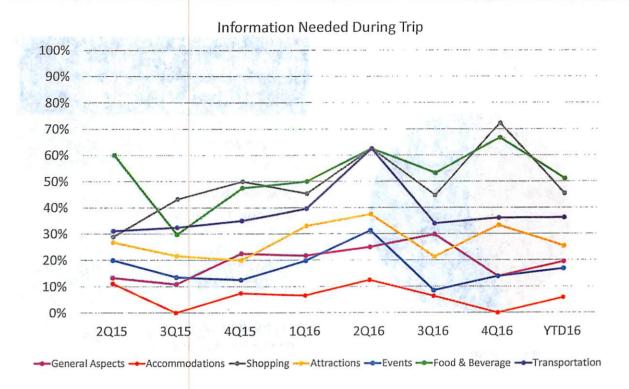
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Information Needs: Quarterly Trends



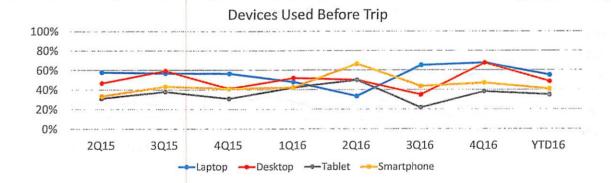
Information Needs: Quarterly Trends

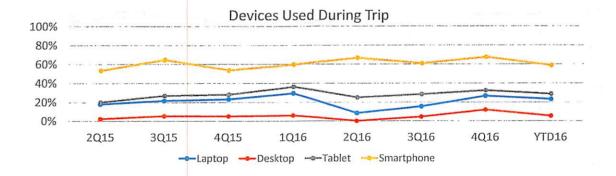


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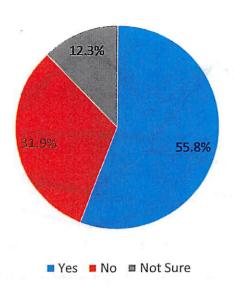
Information Needs: Quarterly Trends





Destination Advertisements: Quarter 4, 2016

Seen/Read/Heard Advertisements



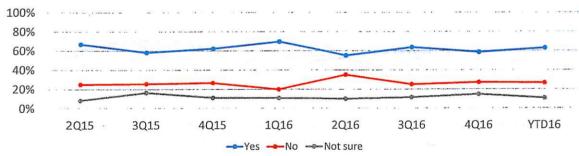
Advertisement Attribute	Rating Score (-1 to +1 scale)
Attractive	1.0
Showing Interesting & Unique Features	0.8
Accurate & Trustworthy	0.6
Helpful in Imagining Visiting Destination	480 0.9

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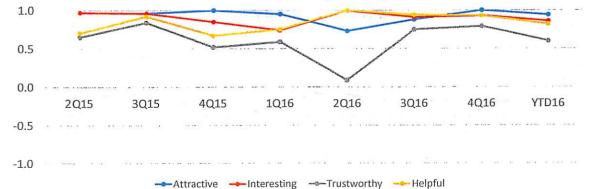
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Destination Advertisements: Quarterly Trends

Seen/Read/Heard Advertisements

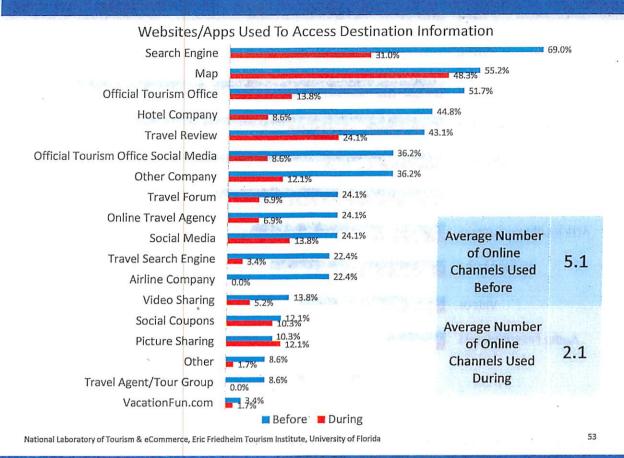


Advertisement Attribute Rating Scores (-1 to +1 scale)

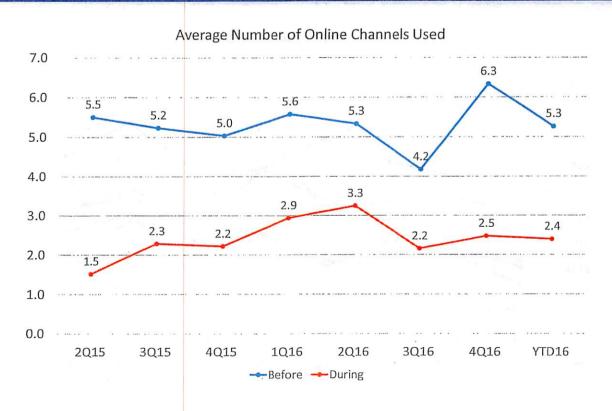


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Online Channel Use: Quarter 4, 2016

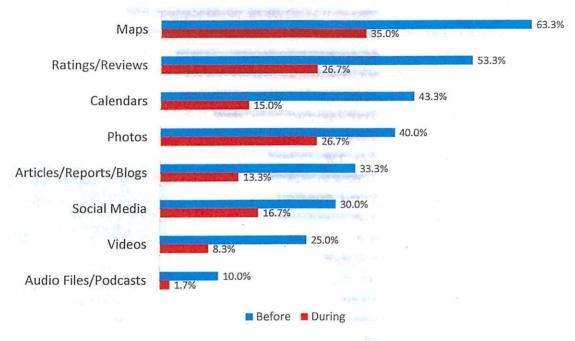


Online Channel Use: Quarterly Trends



Online Media Use: Quarter 4, 2016

What kind of media is being used to access information?

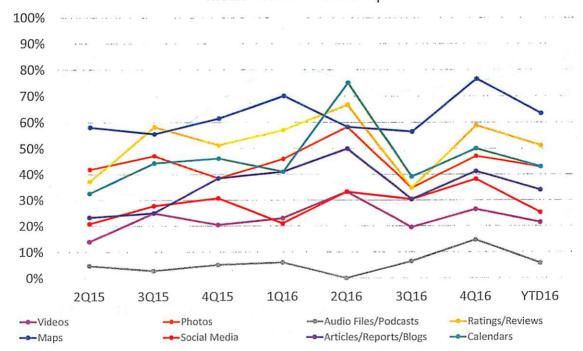


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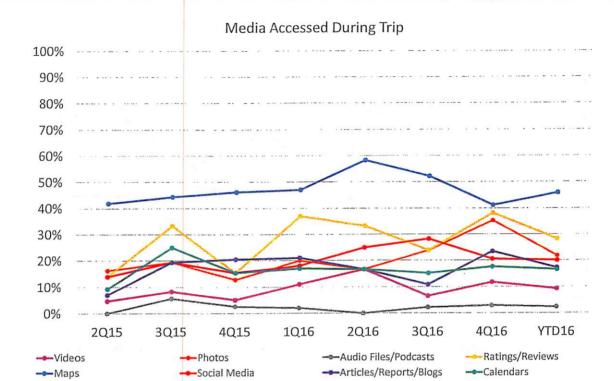
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Online Media Use: Quarterly Trends

Media Accessed Before Trip



Online Media Use: Quarterly Trends

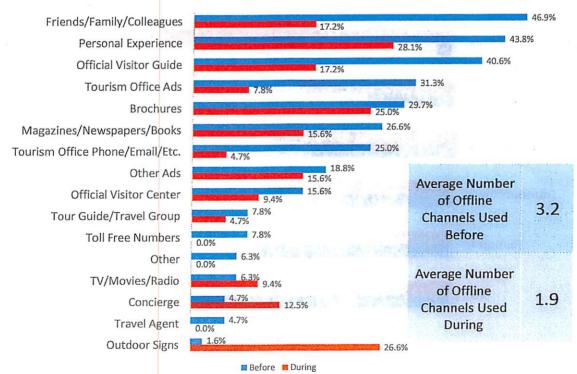


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Offline Information Sources: Quarter 4, 2016

What kind of offline sources are visitors using and when?



Offline Channel Use: Quarterly Trends



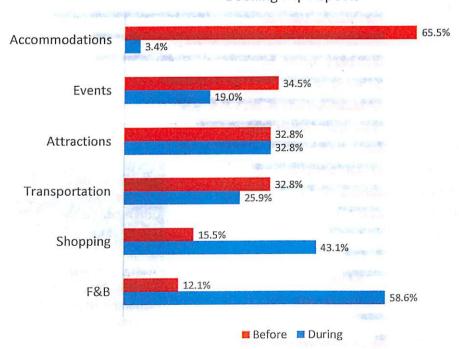


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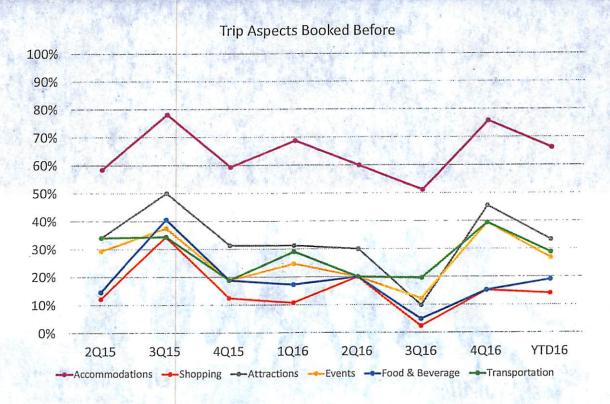
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Booking: Quarter 4, 2016

Booking Trip Aspects



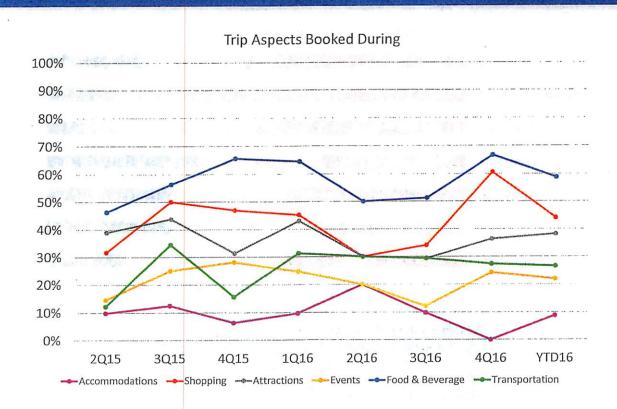
Booking: Quarterly Trends



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Booking: Quarterly Trends

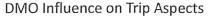


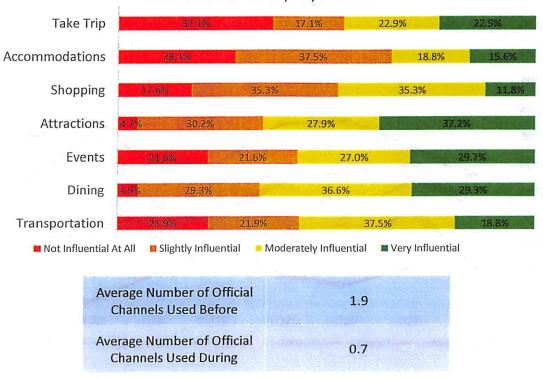
Part 2: Follow-Up Survey

Decision Making and Influence

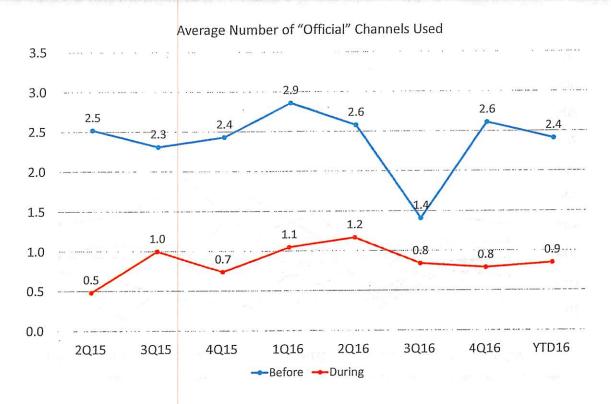


Use & Influence of DMO: Quarter 4, 2016





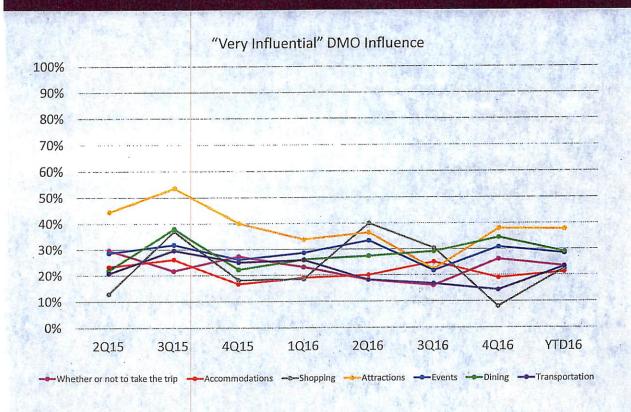
Official Channel Use: Quarterly Trends



National Laboratory of Tourism & eCommerce, Eric Friedheim Tourism Institute, University of Florida

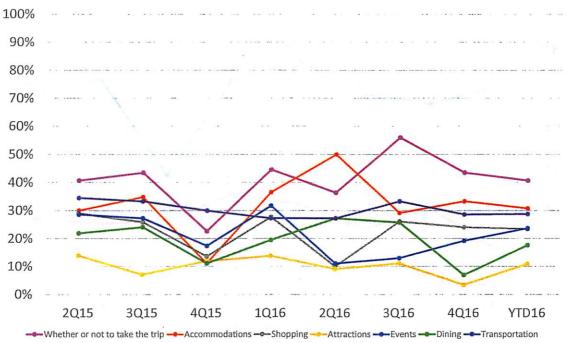
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Use & Influence of DMO: Quarterly Trends



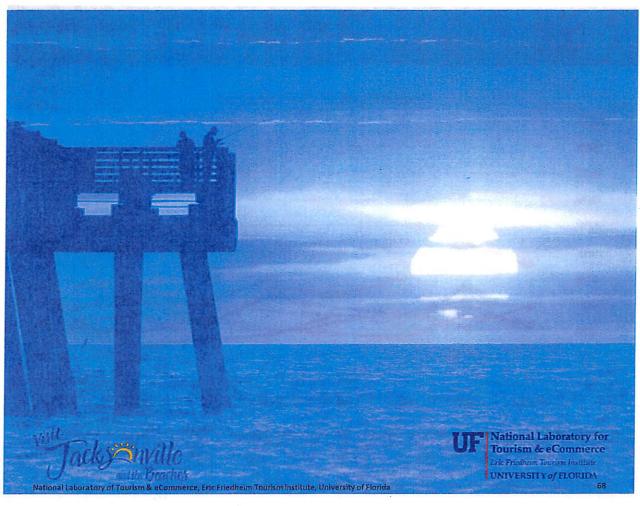
Use & Influence of DMO: Quarterly Trends

"Not at all Influential" DMO Influence



 $National\ Laboratory\ of\ Tourism\ \&\ eCommerce,\ Eric\ Friedheim\ Tourism\ Institute,\ University\ of\ Florida$

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Visitor Volume:

DK Shifflet: Visitor Volume - \$9.525

Travel volume has a different meaning depending on what is being estimated and for what purpose the data are being used. While most destination clients generally use person-stays or person-days and most lodging clients use room-nights, DK Shifflet estimates volume in several metrics to provide the most complete picture possible and can access multiple years at once for larger data pool: for example, right now they could look at 2016, 2015, & 2014.

Stays

This metric tells you how many total travel parties (not necessarily unique) stayed in your destination. A stay is counted for each unique destination on a trip. A trip from Berkeley, CA to Portland, OR that included stops in Sacramento, CA and Bend, OR would be counted as three stays – one for each destination city (Sacramento, Bend and Portland) or one stay for California and two stays for Oregon.

Person Stays

This metric tells you how many total bodies (not necessarily unique) stayed in your destination. The number of people on each stay is multiplied by the number of stays. Thus, if there were four people on the trip from Berkeley to Portland the total number of person-stays would be 12 – four for each destination city, or four person-stays for California and eight person-stays for Oregon.

Person - Days

This metric tells you how many total days were spent in your destination. Person-days incorporate the length of stay and are the most important metric to use when analyzing spending. To calculate person-days, the number of person-stays is multiplied by the number of days spent at each stay. Thus, if two days were spent in Sacramento and three days each in Bend and Portland, the total number of person-days would be 32 – eight for Sacramento and 12 each for Bend and Portland, or eight person-days for California and 24 person-days for Oregon.

Room Nights

This metric tells you how many nights were spent in hotel rooms and is primarily used by lodging clients. Since hotel rooms house multiple people, the "person" element is not important for this metric. Thus, room-nights demonstrate the number of nights spent in a hotel room during each stay. If one night was spent in a hotel in Sacramento and two nights each were spent in Bend and Portland, the total number of room-nights on this trip would be five — one in California and four in Oregon.

Spend

DK Shifflet collects spending information in nine major categories from which total direct spending as well as per person per day spending are calculated.

- Transportation (three measures: air, rental car, other)
- Lodging (two measures: rate and services)
- Food
- Entertainment
- Shopping
- Other Expenses

Example: https://washington-org.s3.amazonaws.com/s3fs-public/2016 visitor statistics september 2017.pdf

Texas Executive Summary

Volume/Share

volume of Person-Days was estimated at 549.48 million. The number of Person-Stays to Texas was estimated at 266.15 million in 2016 and the

Texas Volume (millions)

66.99	176.23	243.22	2014
71.36	184.63	255.98	2015
71.75	194.40	266.15	2016
Business	Leisure	Total	Person-Stays
137.89	379.85	517.73	2014
142.12	393.73	535.85	2015
141.78	407.70	549.48	2016
Business	Leisure	Total	Person-Days

Visitor Profile:

In the past we have used Longwood's to do our visitor profile, but there are several companies that can complete similar research, these include:

- DK Shifflet
- Downs & St. Germaine
- Destination Analysts

For example:

DK Shifflet Visitor Profile - \$22,000 with Charts and Graphs

DK Shifflet's TRAVEL PERFORMANCE/Monitors data allows you to profile and understand the travel characteristics of various types of visitors or guests to your (and your competition's) destination, lodging chain or other travel-related businesses (airlines, auto rental, theme parks and more).

Traveler Profile data provides insights on the following:

The type of traveler

- Business total & nine subcategories (day or overnight)
- Leisure total & eight subcategories (day or overnight)
- Who they are (demographics)
- Where they come from (origin geography)
- Where they stay (accommodation information)
- What they do (activities)
- How much they spend and on what
- What they think of your destination/property

For lodging, this can be analyzed by segment and rate paid with subcategories (STR categories also available):

- High-end
- Mid-level
- Economy

For destinations, this can be analyzed by geography and spend levels:

- State
- MSA
- City
- Customized geographies

Years 2016, 2015, 2014 are already prepared and could be purchased at any time, survey includes research from multiple years to give a more complete picture.

Examples: https://travel.texas.gov/tti/media/PDFs/2016-Texas-Final_2.pdf (Visitor Profile full version)

	TEXAS		TEXAS	
Activities Summary (Stays)				
Attractions (Net)	18.4%	Nature (Net)	14.4%	
Nightlife (bar, nightclub, etc.)	7.1%	Parks (national/state, etc.)	6.7%	
Zoo/Aquarium	3.6%	Beach/Waterfront	6.4%	
Theme/Amusement/Water Parks	3.0%	Wildlife Viewing (birds, whales, etc.)	2.3%	
Culture (Net)	26.1%	Outdoor Sports (Net)	8.7%	
Historic Sites	7.6%	Fishing	2.8%	
Movies	7.3%	Hiking	2.0%	
Touring/Sightseeing	6.7%	Golfing	1.6%	
Family/Life Events (Net)	41.1%	General (Net)	38.3%	
Visit Friends/Relatives (general visit)	30.6%	Shopping	23.6%	
Personal Special Event (Anniversary, Birthday)	5.5%	Business	6.9%	
Holiday Celebration (Thanksgiving, July 4th, etc.)	5.1%	Medical/Health/Doctor Visit	3.7%	
Libation and Culinary (Net)	22.9%	Trip Party Composition (Trip-Days)		
Culinary/Dining Experience	21.8%	Avg. Party Size (Adults and Children)	1.77	persons
Winery/Distillery/Brewery Tours	2.2%	One Male Only	29.6%	
		One Female Only	20.6%	
		One Male and One Female	28.5%	
		Two Males or Two Females	5.6%	
		Three or More Adults	4.5%	
		Children Present	11.1%	

Examples of Full Reports from DK Shifflet

2016 Texas Tourism Region and MSA Visitor Profile

State of Texas

INSIGHTS THAT TAKE YOU PLACES



2016 Texas Tourism Region and MSA Visitor Profile

An Inside Look at the Travel Market in Texas

D. K. Shifflet 1749 Old Meadow Rd, Suite 425 McLean, Virginia 22102

> Tel.: +1.703.536.0500 www.dksa.com

Jeffrey Eslinger Senior Director, Client Insights jeslinger@dkshifflet.com



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Objectives of this report...

The objective of this report is to provide comprehensive and reliable travel information for tourism to and within Texas.

How to read this report

The data are presented in a user-friendly manner to allow decision makers to fully understand travel patterns in their market and to help them design specific strategies for their product.

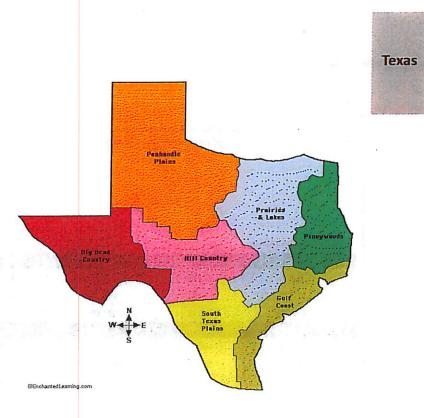
The data are made available by D.K. Shifflet and Associates, Ltd, through its DIRECTIONS syndicated traveler tracking system. It provides an accurate representation of domestic travel patterns to Texas' Tourism Regions and MSAs.

Data

Texas Visitor Profile

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Highlights of Visitors to Texas

- Texans generated 62.4% of Person-Days to the State; Non-Texans 37.6%
- Top 3 Texan origin DMAs (Dallas-Fort Worth, Houston, San Antonio); Non-Texan DMAs (Los Angeles, CA, New York, NY, Monroe, LA-El Dorado, AR)
- Leisure travel represented 77.6% of Person-Days to the State; Vacation 22.0% and Non-Vacation 55.6%
- Business travel represented 22.4% of Person-Days to the State; Meetings 9.1% and Transient 13.3%
- Activity categories participated: Attractions 18.4%, Culture 26.1%, Family/Life Events 41.1%, Libation/Culinary 22.9%, Nature 14.4%, Outdoor Sports 8.7%, General 38.3%
- Average Party Size (Adults and Children): 1.77 persons
- Average Length of Stay was 1.96 days (overnight and days); 2.47 nights (overnight only)
- 82.3% traveled by Auto; 14.9% by Air
- Average distance traveled: 436 miles
- Accommodation Type: Paid 62.8%; Non-Paid 37.0%; Other Overnight 0.2%
- Average Per Person Per Day Spending: \$125.80
- Average Age: 45.9 years
- Average Household Income: \$98,140
- Employment: Employed 70.0%, Retired 15.1%, Not Employed 14.9%
- Marital Status: Married 67.3%, Never Married 22.9%, Divorced/Widowed 9.8%
- Children in Household: Yes 36.1%, No 63.9%

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Texas Executive Summary

Volume/Share

The number of Person-Stays to Texas was estimated at 266.15 million in 2016 and the volume of Person-Days was estimated at 549.48 million.

Texas Volume (millions)

Person-Days	Total	Leisure	Business
2016	549.48	407.70	141.78
2015	535.85	393.73	142.12
2014	517.73	379.85	137.89
Person-Stays	Total	Leisure	Business
2016	266.15	194.40	71.75
2015	255.98	184.63	71.36
2014	243.22	176.23	66.99

		TEXAS		TEXAS
Top Origin DMAs (Person-Days)		Name of	Top Origin DMAs (Person-Days)	* 54.5
In State DMAs	E-04 180	100000	Out-of-State DMAs	-
Total Texans (Intrastate)	A CONTRACTOR OF THE PARTY OF TH	62.4%	Total Non-Texans (Interstate)	37.6%
	Dallas-Fort Worth	15.2%	Los Angeles, CA	1.6%
	Houston	13.9%	New York, NY	1.4%
	San Antonio	7.9%	Monroe, LA-El Dorado, AR	1.2%
	Austin	7.4%	Kansas City, MO	1.1%
Harlingen-Weslaco-	Brownsville-McAllen	5.5%	Oklahoma City, OK	1.0%
	Waco-Temple-Bryan	1.9%	Denver, CO	1.0%
	Odessa-Midland	1.5%	Shreveport, LA	0.9%
	Amarillo	1.2%	Washington, DC (Hagerstown, MD)	0.9%
Tyler-Longview (L	ufkin, Nacogdoches)	1.0%	Chicago, IL	0.9%
	Laredo	1.0%	Phoenix, AZ	0.9%
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Texas Visitor Profile

		TEXAS			TEXAS
Purpose of Stay	(Person-Days)		Purpose of Stay (Per	rson-Days)	
Total Leisure	The state of the s	77.6%	Total Business	DATE OF THE PARTY	22.4%
Vacation		22.0%	Meetings		9.1%
2.1	Getaway Weekend-Overnight	11.1%		Seminar/Training	4.4%
	General Vacation-Overnight	8.6%		Convention	2.3%
	Day Trip Vacation/Getaway	2.3%		Other Group Meeting	2.4%
Non-Vacation		55.6%	Transient		13.3%
	Visit Friend/Relative	31.9%		Sales/Purchasing	2.9%
	Special Event (celebration, reunion)	10.5%		Consulting/Client Service	2.6%
	Medical/Health Care	2.1%		Construction/Repair	2.0%
	Convention/Show/Conference	1.6%		Government/Military	1.3%
	Seminar/Class/Training (personal)	1.0%		Inspection/Audit	0.9%
	Other Leisure/Personal	8.5%		Other Business	3.5%

Mary Charles and Charles and Charles and	TEXAS	eter Carrier 10. Teacher Toll 95 Teacher 9	TEXAS	
Activities Summary (Stays)				September 1
Attractions (Net)	18.4%	Nature (Net)	14.4%	
Nightlife (bar, nightclub, etc.)	7.1%	Parks (national/state, etc.)	6.7%	
Zoo/Aquarium	3.6%	Beach/Waterfront	6.4%	
Theme/Amusement/Water Parks	3.0%	Wildlife Viewing (birds, whales, etc.)	2.3%	
Culture (Net)	26.1%	Outdoor Sports (Net)	8.7%	
Historic Sites	7.6%	Fishing	2.8%	
Movies	7.3%	Hiking	2.0%	
Touring/Sightseeing	6.7%	Golfing	1.6%	
Family/Life Events (Net)	41.1%	General (Net)	38.3%	
Visit Friends/Relatives (general visit)	30.6%	Shopping	23.6%	
Personal Special Event (Anniversary, Birthday)	5.5%	Business	6.9%	
Holiday Celebration (Thanksgiving, July 4th, etc.)	5.1%	Medical/Health/Doctor Visit	3.7%	
Libation and Culinary (Net)	22.9%	Trip Party Composition (Trip-Days)		
Culinary/Dining Experience	21.8%	Avg. Party Size (Adults and Children)	1.77	persons
Winery/Distillery/Brewery Tours	2.2%	One Male Only	29.6%	
		One Female Only	20.6%	
		One Male and One Female	28.5%	
		Two Males or Two Females	5.6%	
		Three or More Adults	4.5%	
		Children Present	11.1%	

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Texas Visitor Profile

The section of the se	TEXAS	. STATE OF THE STA	A STATE OF THE STA	TEXAS
Length of Stay (Stays)		-	Accommodation Type (Person-Days)	
Average Length (Incl. Days)	1.96	days	Paid Accommodations	62.8%
Average Length (Overnight Only)	2.47	nights	Hotel/Motel	46.1%
Day -Trips	51.0%		High-E	and the second second second
1-3 Nights	40.3%		Mid-Lev	el 17.7%
4-7 Nights	70%		Econor	ny 14.5%
8+ Nights	1.7%		Other Hotel/Motel	3.0%
Primary Mode of Transportation (Person-Da	ys)		Non-Hotel/Motel	16.7%
Air	14.9%		Non-Paid Accommodations	37.0%
Auto Travel (Net)	82.3%		Other Overnight	0.2%
Other Transportation (Net)	2.8%			
Bus	2.2%			
Train	0.3%			
Other	0.3%			
Distance Traveled One-Way from Home (Person	Days)		ADDRESS MANAGES (Class Committee) Address (
Average Distance Traveled	436	miles		
250 Miles or Fewer	54.8%			
251-500 Miles	15.4%			
500-1000 Miles	14.7%			
1001 Miles or More	15.2%			

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		TEXAS			TEXAS
Expenditure Summary (Person-D	ays)		Expenditure Summary (Person-Days)	
			Avg. Per Person Per Day	y Spending	\$125.80
Transportation - Total		33.0%	Transportation - Total		\$41.50
Transportat	ion - Excluding Airfare	21.1%	Tran	sportation - Excluding Airfare	\$26.50
Ti Ti	ransportation - Airfare	11.9%		Transportation - Airfare	\$96.90
Trans	sportation - Rental Car	5.2%		Transportation - Rental Car	\$42.10
	Transportation - Other	15.8%		Transportation - Other	\$19.90
Food		24.6%	Food		\$30.90
Lodging - Total	at an elegan	18.3%	Lodging - Total		\$47.40
	Lodging - Room	17.0%		Lodging - Room	\$48.90
	Lodging - Services	1.3%		Lodging - Services	\$4.80
Shopping	and the second second second	12.9%	Shopping		\$16.30
Entertainment		7.9%	Entertainment		\$9.90
Miscellaneous		3.3%	Miscellaneous		\$4.20

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Texas Visitor Profile

		TEXAS		TEXAS
Demographic Profile (Person-Da	ys)	美国建筑		
Average Age		45.9	Employment	
The last the same than the same	18-34 years	30.2%	Employed	70.0%
	35-49 years	27.9%	Retired	15.1%
	50-64 years	27.7%	Not Employed	14.9%
	65+ years	14.2%		
			· Marital Status	
Average HH Income (in \$1,000)		\$98,140	Married	67.3%
	Under \$25,000	8.7%	Never Married	22.9%
	\$25,000-\$49,999	21.0%	Divorced/Widowed	9.8%
John Design Child Steel and Parket	\$50,000-\$74,999	17.8%	AND THE PROPERTY OF THE PROPERTY OF	
	\$75,000-\$99,999	14.4%	Children in Household	
Participation of Especial Association	\$100,000-\$149,999	20.7%	ravenski um stani prami i stani i Yes	36.1%
	\$150,000+	17.4%	No	63.9%

Appendix

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User's Guide

Basic Units of Measure

The majority of data in the report is presented in travel person "days," also referred to as "Person-Days." The use of "days" accounts for the difference in party size and travel duration between travel parties. For example, each person does not spend the same amount of time at a travel destination. One person may stay for one day while another stays for eight days, each generating different revenue and economic impacts; therefore, "Person-Days" based data captures a fuller impact of a person's travel and represents a more comprehensive understanding of the competitive destinations market. "Person-Days" includes Day-Trips of over 50 miles one-way as well as overnight trips. Overnight trips are converted to "days" by adding to the number of nights a "day" factor.

"Person-Stays" represents the measure of the travel industry for which one person accounts for one trip regardless of trip length. "Person-Stays" is used to estimate travel volume. While "Person-Stays" does not capture the full impact of a person's travel, volume in "Person-Stays" is widely used in the industry. The estimated volume therefore allows comparison with other industry sources. "Person-Stays" includes Day-Trips of over 50 miles one-way and overnight trips.

"Trip-Days" represents the number of travel days spent in the market, regardless of the number of people in the travel party, and allows trips of longer length by any particular trip party type to have a greater weight than shorter trips. This measure is used to report trip party composition.



Volume/Share of Travel:

The volume of travel is estimated as the number of Person-Stays as well as the number of Person-Days at a specific destination. The share of travel is the percentage of total Person-Days to Texas accounted for by a specific destination. This information is helpful in assessing the relative volume of travel to specific destinations.

Designated Market Area (DMA):

A DMA is geographic area defined by Nielson Media Research, Inc. for what is commonly known as a television broadcast market. Every U.S. county is one and only one DMA. The data present a list of top Texas origin DMAs as well as Non-Texas origin DMAs. Some Texas DMAs are larger than 50 miles and include out-of-state counties. This information is very useful when evaluating advertising markets.

Purpose of Stav

The primary reasons for visiting a destination are outlined. Business Person-Days are divided into Group Meetings (e.g., conventions/seminars) and Transient Business (e.g. sales/consulting). Leisure Person Days are segmented into Leisure Vacation (e.g., general vacation/getaway weekend) and Leisure Non-Vacation (e.g., visiting friends and relatives/special event). They are also segmented by activities that are grouped in various categories, such ass Attractions, Outdoor Sports, Nature, Culture, and Touring. Information on purpose of stay and activities is useful in understanding travel motivations and has direct implications for advertising messages.

Travel Party Composition/Length of Stay:

Trip Party Composition is defined as the makeup of people in the immediate travel party. Trip Party Compositions include the following segments: adults traveling with children (families), couples (one male/one female), one male alone, one female alone, or other adult combinations. The Length of Stay is distributed into Day-Trips, short trips (1-3 nights), medium trips (4-7 nights), and long trips (8+ nights). Information obtained from Trip Party Composition and Length of Stay helps profile the traveler. Both measures are strongly related to the purpose of stay. For instance, the Transient Business person (e.g., salesperson) generally travels alone and has a shorter trip length.

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User's Guide

Expenditures:

Data on expenditures represent direct spending per person per day for six expenditure categories: transportation, food/drink, entertainment, shopping, accommodations, and other miscellaneous expenditures. Expenditure information is critical in assessing the direct economic impact of visitors.

Mode of Transportation/Distance Traveled:

The primary modes of transportation include air, car, bus, train, van/small truck, and camper/RV. The distance traveled (one-way) from home is categorized into short distances (less than 250 miles), medium distances (251 to 500 miles; 501 to 1,000 miles), and long distances (1,001 miles or more). This information is useful in deciding on advertising vehicles and communication reach.

Type of Accommodations:

The proportion of Day-Trips versus one or more nights travel is shown. Lodging types are distributed into paid accommodations (i.e., hotel/motel and non-hotel/motel) and non-paid accommodations. The strength of the hotel/motel market is compared to other paid and non-paid accommodations.

Demographic Profile:

Visitors' age, income, and employment status are key to determining the socioeconomic profile of visitors.

Confidence Interval

The confidence interval table indicates how well the data, based on a sample, reflects the entire population of travelers. The smaller the interval, the more relevant the data and the greater confidence we have that the sample number represents the population. Percentage Findings in Report or Data Tables as follows:

Total Travel	THE RESERVE OF THE PERSON NAMED IN COLUMN TWO		At or near 5% or 95%	A STATE OF STREET WALLS	At or near 25% or 75%	At or near 50%
Total Texas	5,507	0.2%	0.4%	0.6%	0.8%	1.1%

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Research Methodology

DKSA's TRAVEL PERFORMANCE/Monitors^{5M} is a comprehensive study measuring the travel behavior of US residents. DKSA contacts 50,000 distinct U.S. households monthly and has done so since 1991. DKSA is able to provide current behavior and long term trended analyses on a wide range of travel.

DKSA data are collected using an online methodology employing KnowledgePanel®, an address based sample panel offered by Knowledge Networks. The sample is drawn as a national probability sample and returns are balanced to ensure representation of the U.S. population according to the most recent U.S. Census. Key factors used for balancing are Origin State, Age, Income, Education, Gender, Ethnicity/race and return rates. The Knowledge Networks sample is used to create benchmark weights which are applied to surveys returned from other managed panels used by DKSA.

Both traveling and non-traveling households are surveyed each month enabling DKSA to generate the best estimate of travel inddence (volume) within the total U.S. population. Among those who have traveled (overnight in the past three months, and daytrips in the past month) details of their trip(s) are, recorded for each month. This overlapping, repeating monthly approach boosts the observed number of trips for each travel month and to controls for isosately and telescoping biaset.

"Travel" is defined as either an overnight trip defined as going someplace, staying overnight and then returning home or as a day trip defined as a place away from home and back in the same day. Respondents report travel behavior for each stay of each trip; an approach that enhances reporting for specific travel events, activities and spending.

A wide variety of general travel information is collected including travel to destinations at a city level, hotel stayed in, purpose of stay and activities, expenditures, mode of transportation, party composition, length of stay, travel agent and group tour usage, satisfaction and value ratings, and demographics, including origin markets.

Several questions are asked as open-ends to ensure that the responses are not influenced by a pre-listed set of response categories. Each respondent identifies the actual destination visited with an open-end response. This is particularly significant for obtaining accurate data for smaller cities and counties and representing total travel. This increases time and expense to accurately capture these responses but quality requires it.

Extensive coding lists are updated regularly to ensure that all data is recorded accurately. DKSA's Quality control committee conducts bi-monthly meetings to review survey results and examine methods to maintain and ...

D.K. Shifflet & Associates Ltd. is the leading the consumer travel research from DKSATS to a second Asterna. VA and has, for the last 27 years, provided the Industry's meet consumer based travel data on U.S. residents and their travel worldwide. Our clients include destination marketing organizations, theme parks, credit cards, auto clubs, hotel chains and more.

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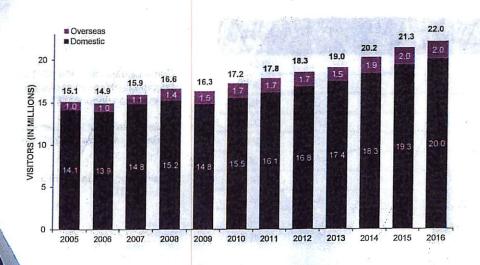
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2016 VISITOR STATISTICS WASHINGTON, DC

TOTAL VISITATION TO WASHINGTON, DC WASHINGTON, DC (DISTRICT OF COLUMBIA)



In 2016, DC welcomed a total of 22.0 million visitors, setting a new record for the city.

Overseas visitation is for the District of Columbia only, and does not include Mexico or Canada.

Sources: DK Shifflet; Travel Market Insights, National Travel & Tourism Office, U.S. Department of Commerce

OVERSEAS VISITATION WASHINGTON, DC MSA

Destination (MSA)	2014	2015	2016	2016 Visitation
New York, NY	1	1 1	1	9.80 M
Miami, FL	2	2	2	5.38 M
Los Angeles-Long Beach, CA	3	3	3	4.98 M
Orlando, FL	4	4	4	4.47 M
Las Vegas, NV	6	6	5	3.57 M
San Francisco, CA	5	5	6	3.33 M
Honolulu/Oahu, HI	7	7	7	2.39 M
Washington, DC	8	8	8	2.09 M
Chicago, IL	10	9	9	1.53 M
Boston, MA	9	10	10	1.47 M

The MSA rankings in 2016 remained largely the same as 2015.

The Washington, DC MSA's overseas visitor volume decreased slightly in 2016.

8 of the top 10 destinations saw decreases in visitation in 2016.

Excludes Canada and Mexico; city statistics are for each metropolitan area Source: National Travel & Tourism Office, U.S. Department of Commerce

OVERSEAS VISITATION WASHINGTON, DC (DISTRICT OF COLUMBIA)

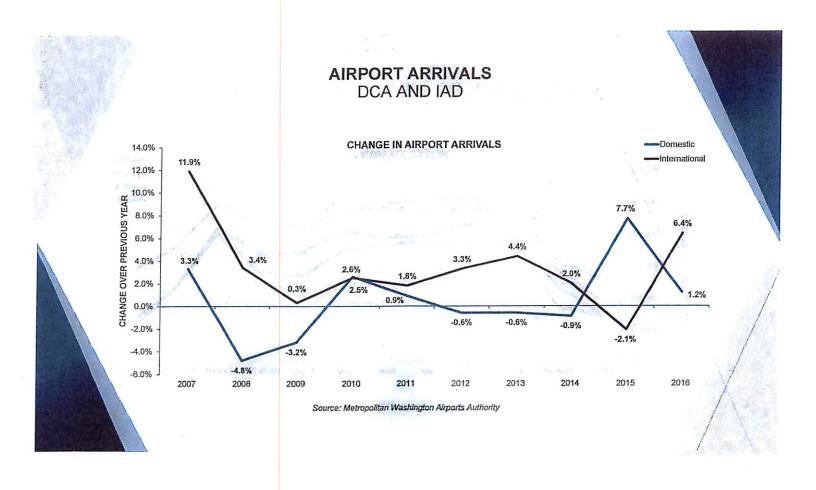
Origin Country	2014	2015	2016	2016 Visitation
China	1	1	1	304 K
United Kingdom	2	2	2	199 K
Germany	3	3	3	145 K
France	4	5	4	103 K
India	. 6	6	5	100 K
South Korea	7	7	6	93 K
Australia	5	4	7	81 K
Italy	10	9	8	62 K
Spain	NA	NA	9	62 K
Japan	8	9	10	58 K

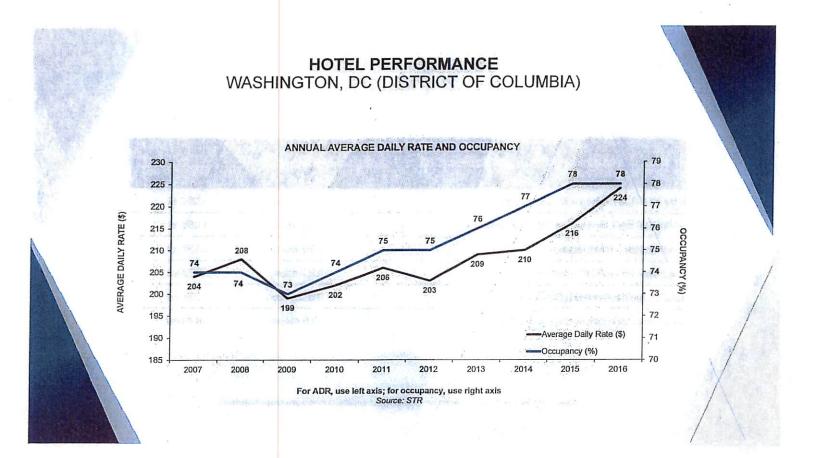
China overtook the UK in 2013 to become the #1 country of origin for overseas visitors to DC.

India rose to 5th in 2016, with an increase in visitation of 25% over 2015.

Spain was not in the top 10 in 2014 or 2015.

Excludes Canada and Mexico; city statistics are for the District of Columbia Source: Travel Market Insights, National Travel & Tourism Office, U.S. Department of Commerce



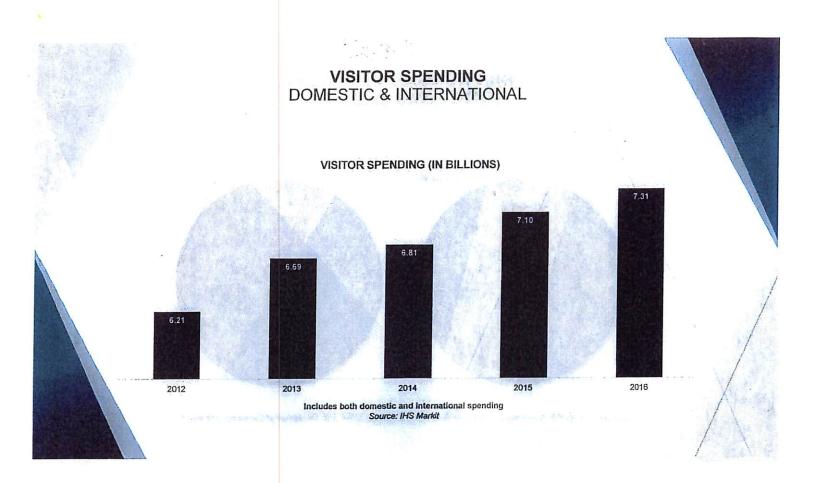






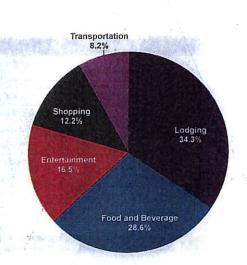
TOURISM INDICATORS 2015 VS. 2016

ADDITIONAL TOURISM INDICATORS	2016 Visitation	Percent Change 2015-16
National Park Service – Mall locations	33.8 million	1.0% 🛊
National Park Service – All DC area locations	39.4 million	1.6% 🛊
Smithsonian – Mall locations	22.7 million	3.9% 🛊
Smithsonian – All DC area locations	29.3 million	6.7% ★
Total Domestic Arrivals (DCA+IAD)	18.8 million	1.2% 🛊
Total International Arrivals (DCA+IAD)	3.9 million	6.4% 🛊



VISITOR SPENDING WASHINGTON, DC (DISTRICT OF COLUMBIA)

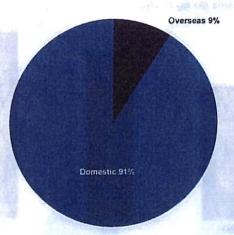
	SAME OF STREET	
Expenditure Category	2016 (\$)	% Change
Lodging	2.51 billion	4.0% ♠
Food and Beverage	2.10 billion	2.7% 🖈
Entertainment	1.21 billion	3.4% ♠
Shopping	891 million	1.6% 🖈
Transportation	604 million	0.1% 🖈

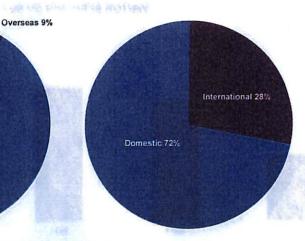


Source: IHS Markit

DOMESTIC VS. INTERNATIONAL VISITATION & SPENDING







Sources: DK Shifflet; Travel Market Insights, National Travel & Tourism Office, U.S. Department of Commerce; IHS Markit

TAX REVENUE VISITORS TO WASHINGTON, DC (DISTRICT OF COLUMBIA)

Local Tax Revenue	(\$)
Corporate Income	19,321,505
Personal Income	45,239,811
Social Security & Other Taxes	1,499,709
Occupancy Tax	262,036,099
Property Taxes	212,983,485
Excise & Fees	20,762,687
Sales Tax	226,260,435
Restaurant	145,573,687
Retail	70,533,899
Airport	7,299,279
Car Rental	2,853,570
Local Total	788,103,732

Federal Tax Revenue (\$)		
Corporate Income	82,344,307	
Personal Income	153,346,403	
Excise & Fees	49,610,319	
Social Security & Other Taxes	355,145,250	
Federal Total	640,446,279	

Local + Federal Total = \$1.42 billion +3.3% change from 2015

Source: IHS Markit

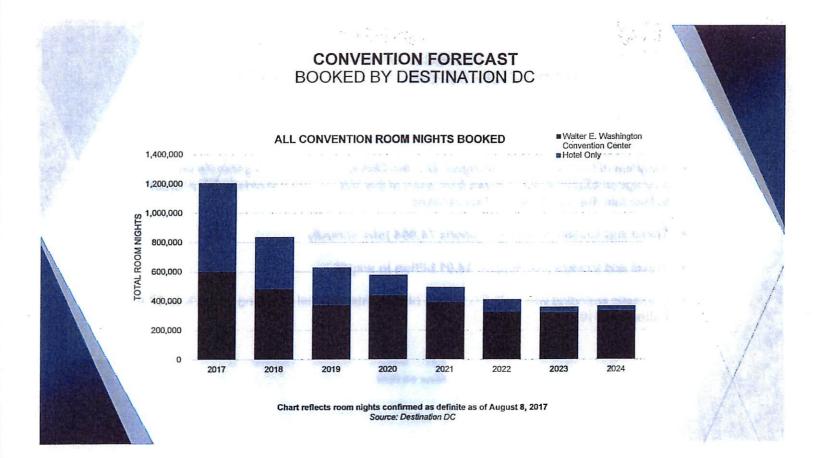
TOURISM IMPACT WASHINGTON, DC (DISTRICT OF COLUMBIA)

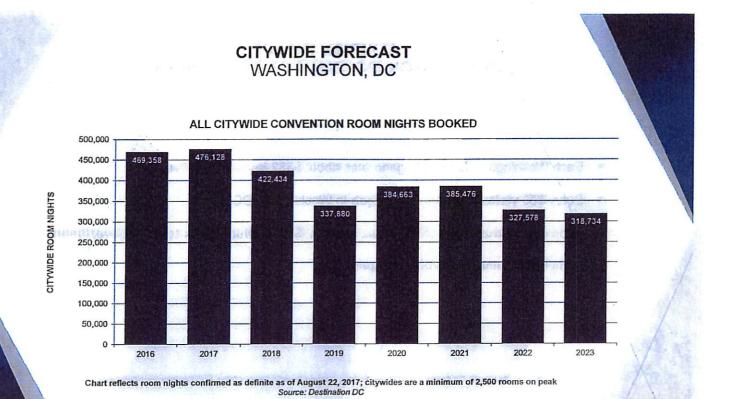
- If tourism did not exist in Washington, DC, the District would need to generate an average of \$2,598 in local taxes from each of the 303,321 households in DC in order to maintain the current level of tax receipts.
- Travel and tourism spending supports 74,654 jobs annually.
- Travel and tourism jobs support \$4.01 billion in wages.
- Domestic spending was up 2.2% to \$5.3 billion; international spending up 5.1% to \$2.0 billion in 2016.

Source: IHS Markit

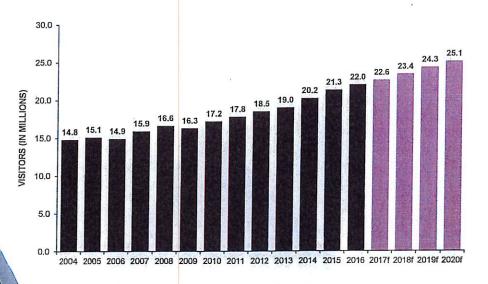
TOURISM IMPACT WASHINGTON, DC (DISTRICT OF COLUMBIA)

- Each Washington, DC visitor generates about \$332 in expenditures.
- Every 300 visitors creates a new job in Washington, DC.
- Each visitor creates about \$65 in tax receipts, \$36 of which goes to local government.
- Each visitor generates \$182 in wages.





VISITATION FORECAST THROUGH 2020 WASHINGTON, DC (DISTRICT OF COLUMBIA)



DC's total visitor volume in 2016 reached a record high and is expected to continue to increase by 2 to 3% each year through 2020.

Sources: IHS Markit, DK Shifflet, Travel Market Insights, National Travel & Tourism Office, U.S. Department of Commerce

METHODOLOGY

VISITOR VOLUME: DK SHIFFLET (DOMESTIC) AND TRAVEL MARKET INSIGHTS (OVERSEAS)

- Domestic data is collected using an online panel methodology, contacting more than 50,000 distinct U.S. households each month; data is weighted by key demographics to balance the sample to the U.S. population.
- Overseas data comes from the I-94 form for visitors to the U.S. and is supplemented by data from the Survey of International Air Travelers. The data is released by the U.S. Department of Commerce.

VISITOR FORECAST AND ECONOMIC IMPACT: IHS MARKIT

Visitor volume data is combined with economic variables, DC tax collections and other tourism indicators like airport arrivals, transportation statistics and attractions attendance to calculate forecasts and economic impact.

Advertising Effectiveness & Brand Awareness:

SMARInsights Advertising Effectiveness & Brand Awareness Study (\$16,500)

- The specific objectives of this research are to:
 - o Measure the reach of the advertising among a targeted audience;
 - o Evaluate the effectiveness of the marketing through SMARInsights' cost-per-aware household benchmark;
 - o Understand the overlap and potential impact of multiple media;
 - O Determine the ability of the creative to communicate desired messages, again using SMARInsights' destination marketing organization (DMO) benchmarks;
 - O Assess the ability of the advertising to improve the image of the destination, motivate interest in visiting, and increase visitation;
 - o Calculate the number of influenced trips, visitor spending, and return on investment of the media campaigns; and
 - o Forward insights into future refinement of the marketing.

SMARInsights' advertising effectiveness methodology requires respondents to view the actual advertising in order to gauge awareness, so we developed and programmed an online survey. National sample vendors provided a survey link to potential respondents.





Where Florida Begins

Advertising Effectiveness

January 2018



Background

- As the destination marketing organization for Jacksonville and Duval County, Visit Jacksonville is responsible for meeting and convention sales, group tour development, as well as leisure travel marketing. To fulfill its role in attracting leisure visitors, Visit Jacksonville invests in paid advertising campaigns.
- In order to be accountable for the resources invested in these efforts, Visit Jacksonville has retained Strategic Marketing & Research Insights (SMARInsights) to measure the reach and impact of its marketing.
- The specific objectives of this research are to:
 - Measure the reach of the advertising among a targeted audience;
 - Evaluate the effectiveness of the marketing through SMARInsights' cost-per-aware household benchmark;
 - Understand the overlap and potential impact of multiple media;
 - Determine the ability of the creative to communicate desired messages, again using SMARInsights' destination marketing organization (DMO) benchmarks;
 - Assess the ability of the advertising to improve the image of the destination, motivate interest in visiting, and increase visitation;
 - Calculate the number of influenced trips, visitor spending, and return on investment of the media campaigns; and
 - Forward insights into future refinement of the marketing.





Methodology

- SMARInsights has developed a research methodology based on how consumers make their travel decisions. The graphic outlines each step of the process and the measures used to evaluate the effectiveness of a destination's marketing efforts.
- Consumers often have an image of a place even for destinations they have never visited. The evaluation process starts in understanding the prevailing image of the destination as well as the competitive set.
- The process flows from there, with an evaluation of marketing exposure and creative messaging.
- The creative can influence consumers in a number of ways beyond just generating travel. The following report evaluates not only the influence of the marketing on generating trips to Jacksonville, but also the other ways paid marketing impacts destinations.





3



Methodology

- SMARInsights' advertising effectiveness methodology requires respondents to view the actual advertising in order to gauge awareness, so we developed and programmed an online survey. National sample vendors provided a survey link to potential respondents.
- This research measures the impact of the media placed between October 2016 and September 2017. Visit Jacksonville placed targeted marketing in Atlanta, Charlotte, New York City and Philadelphia. But in addition, the creative had the opportunity to reach households across the Southeast. The Southeast States are considered to be Florida, Georgia, Alabama, South Carolina, North Carolina and Virginia.
- SMARInsights developed the sampling plan based on how the media were deployed in these markets. In total, 1,226 interviews were completed in the targeted markets.
- In order to qualify for the survey, respondents had be travel decision makers who regularly take overnight leisure trips of at least 50 miles from home.
- Upon completion of data collection, the results were cleaned, coded and weighted to be representative of the population.
- The following report summarizes the results of the survey.

	Completed Interviews
Atlanta	296
Charlotte	301
New York City & Philadelphia	329
Southeast States	300
Total	1,226





Campaign Overview

- Visit Jacksonville focused print spending in such consumer publications such Travel + Leisure and Food & Wine, but also had a significant presence in airline magazines, including Delta, Southwest and Allegiant.
- Sixty percent of Visit Jacksonville's marketing budget was allocated to digital placements, including banners, pre-roll and social. However, much of the digital placements were retargeting of consumers who searched for information about Jacksonville.
- Out-of-home ads included digital billboards in a handful of markets in addition to mobile ads being delivered to smartphone devices.

Medium	Spending
Print	\$254,256
Digital	\$410,073
Out of Home	\$22,825
Total	\$687,154



















5



Insights

- Given the level of spending for paid media, the Visit Jacksonville campaign had tremendous success at both generating awareness and influencing consumers. Having measured hundreds of destination marketing campaigns, SMARInsights has developed benchmarks based on average DMO performance. The Visit Jacksonville campaign is outperforming those benchmarks for reaching consumers and influencing them. However, the way in which the media is purchased through digital retargeting is likely overstating the influence.
- By developing creative with specific retargeting messages, consumers who are already planning a trip to
 Jacksonville could be encouraged to stay longer, do more and spend more. With this, future measure can
 identify impacted trips against impacted spending
- The area where the Visit
 Jacksonville campaign falls short is
 creative messaging. By focusing on
 the image attributes that drive
 interest in visiting Jacksonville, the
 CVB can both improve the image of
 the area and deliver motivating
 messaging.
- Media placements should also mirror current visitors in terms of demographics, which means delivering to an older and more affluent audience.

Measure	SMARInsights Benchmarks for Local DMO Campaigns*	Jacksonville 2016- 2017 Campaign
Communication Ratings	3.9	3.8
Impact Rating: These ads make me want to visit Jacksonville	3.6	3.4
Impact Rating: These ads make me want to learn more about things to see and do in Jacksonville	3.6	3,3
Impact Rating: These ads make me want to go to the Jacksonville tourism website or request a Traveler's Journal	3.5	3,3
Awareness	Predicted awareness:31.7%	30.3%
Cost per aware household	\$0.37	\$0.09
ROI	\$179	\$642



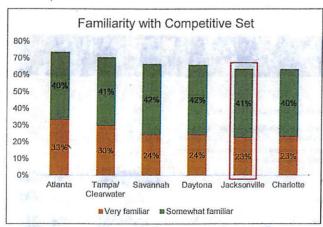
COMPETITIVE POSITION

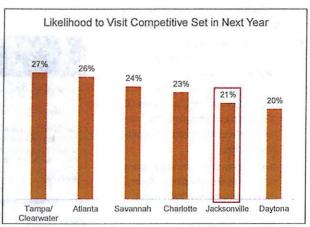




Competitive Position

- While familiarity with a destination is often tied to past experiences, consumers can be familiar in other ways as well, including media coverage and word of mouth. In Jacksonville's target markets, nearly two-thirds of consumers are very or somewhat familiar with the area. While consumers are slightly more familiar with most competitor destinations, Jacksonville is similarly positioned.
- More than one in five consumers in the targeted markets are interested in visiting Jacksonville in the next year.



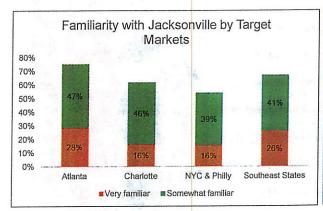


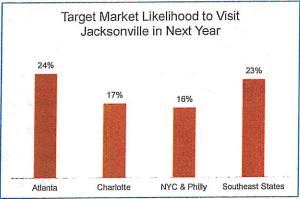




Market Familiarity and Visitation

Destinations often generate the strongest levels of visitation from the most familiar markets. This is true for Atlanta and the Southeast States, which are the most familiar markets and also have the most interest in visiting Jacksonville.





Likelihood is 100% of consumers "already planning to visit," 80% of those "very likely to visit" and 20% of those "somewhat likely to visit."



9



Image of Jacksonville

- Although two-thirds of consumers indicate they are at least somewhat familiar with Jacksonville, the image ratings for the area do not bear this out.
- SMARInsights typically sees destinations with no discernable image receive ratings between 3.0 and 3.5 on a 5-point scale.
- For the most part, Jacksonville is scoring below a 3.5, an indication that the CVB will need to work to develop an image for the area.

Jacksonville Image	Average Rating
Easy to get to	3.6
Dining and food scene	3.4
Friendly people	3.4
Good value for the money	3.3
Sporting events and activities	3.3
Clean and attractive	3.3
Has a wide variety or lots of things to see and do	3.3
Is a place where I feel safe	3.3
Easy to get around once you're there	3.3
Entertainment and night life	3.2
Its appeal as a place to go for couples/adults	3.2
Exciting and full of activities	3.2
Its appeal as a family destination	3.2
Activities for children	3.1
Historic sites and landmarks	3.1
Pedestrian friendly	3.1
Museums, arts and cultural activities	3.1
Live theater and music performances	3.1



Image of Jacksonville

- Atlanta and the Southeast States have the most familiarity and interest in visiting, but Atlanta and Charlotte have the most positive image of the area.
- Looking at the image of Jacksonville as an index, where 100 is average, it is Charlotte, a less familiar market, that has the strongest perceptions of Jacksonville.

	Atlanta	Charlotte	NYC & Philly	Southeast States
Easy to get to	104	100	96	102
Dining and food scene	103	104	96	101
Friendly people	103	103	100	99
Good value for the money	102	102	101	99
Sporting events and activities	100	102	96	102
Clean and attractive	104	105	101	99
Has a wide variety or lots of things to see and do	100	104	96	102
Is a place where I feel safe	105	101	102	98
Easy to get around once you're there	105	101	100	99
Entertainment and night life	101	104	97	101
Its appeal as a place to go for couples/adults	102	106	97	101
Exciting and full of activities	101	104	98	101
Its appeal as a family destination	102	105	98	100
Activities for children	102	102	96	101
Historic sites and landmarks	102	102		102
Pedestrian friendly	104	104	102	99
Museums, arts and cultural activities	102	104	95	102
Live theater and music performances	101	104	97	101



11



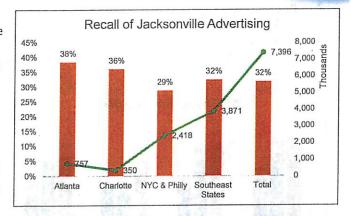
MARKETING AWARENESS





Overall Awareness

- Overall, the campaign reached about a third of the targeted households, which represents more than 7 million households
- However, there are differences in the size of the markets. For example, although recall was highest in Atlanta, it is a far smaller market than New York City & Philadelphia or the Southeast States. So with 38% recall, the paid media reaches about 757,000 households here.
- Conversely, the percentage of recall was lowest in New York City & Philadelphia markets at 29%. But given the number of households, this results in more than 2.4 million aware households.



BAR	Atlanta	Charlotte	New York/ Philly	Southeast States
Targeted HHs	1,971,200	972,189	8,408,090	11,948,845
Recall	38%	36%	29%	32%
Aware HHs	757,055	350,124	2,417,662	3,870,753



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Market Awareness

SMARInsights' has established a number of benchmarks for DMO marketing based on the evaluation of hundreds of campaigns. Of local destination campaigns attempting to reach targeted markets, the adjusted cost-per-aware household benchmark is \$0.37. The goal is to be lower than the benchmark. With an overall cost of \$0.09, the campaign is considered very efficient at reaching the target audience.

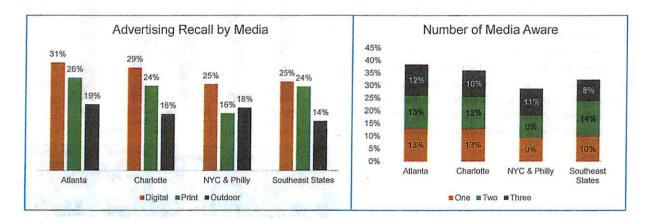


CPH	A SECULAR
Targeted HHs	23,300,325
Recall	31.7%
Aware HHs	7,395,594
Media Spending	\$687,154
Cost per Aware HH	\$0.09



Campaign & Media Overlap

- By being exposed to multiple campaigns and messages, consumers are more likely to bring Jacksonville into their consideration set and ultimately travel there.
- Consumers were more often exposed to print and digital components of the leisure marketing campaign, and distribution of media overlap was similar across the target markets.



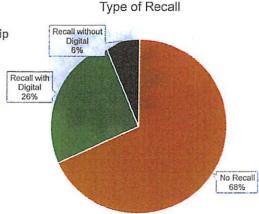


15



Digital Recall

- With 60% of the media budget invested in digital, it is not surprising that it has the most reach. Of the 32% with any recall of the Jacksonville advertising, 26% recall seeing digital components of the campaign. This is especially important given the digital investment in retargeting. Consumers already interested in visiting Jacksonville and those searching for information would subsequently be delivered paid marketing messages.
- Retargeting is an important component of destination marketing because it often encourages those consumers who were already planning to visit to do more on their trip or stay longer, which in turn increases their overall spending.







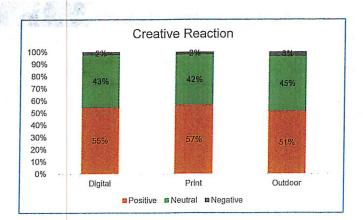
CREATIVE EVALUATION





Creative Reaction

- Creative is designed to elicit a reaction from consumers an improved perception of the destination, additional interest in visiting, and ultimately, actual travel. The impact on these things is more critical than the appeal of the creative, but it doesn't hurt to produce marketing that consumers find appealing.
- For the most part, consumers are positive about all the media, with outdoor garnering slightly less favorable ratings than print and digital.







Creative Ratings

- A campaign must generate awareness, but it should also communicate desired messages in order to drive travel. Through the evaluation of hundreds of destination marketing campaigns, SMARInsights has established a number of benchmarks related to advertising creative.
- After viewing all of the ads, respondents were asked to rate attributes of the Jacksonville marketing using a 5-point scale where 5 = "strongly agree" and 1 = "strongly disagree."
- There are two types of attributes related to advertising creative those that communicate particular messages about the destination and those that encourage the consumer to take an action. The benchmarks are based on the communication attributes of DMO advertising. However, impact attributes have a more difficult time meeting this mark as they require action from a consumer, which is harder than communicating a desired message.
- The goal for both types of attributes is to be within the top 25% of all DMO creative SMARInsights evaluates.

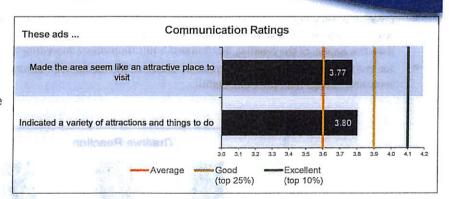


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Communication Ratings

- The Jacksonville creative is performing above average for DMO marketing.
- While the advertising is not meeting the goal of performing in the top 25%, the benchmarks include campaigns with TV, which the Jacksonville campaign does not include.
- SMARInsights often sees TV push ratings higher as it is better able to communicate through moving pictures, music and voiceover. Without these components, other media tend to yield lower ratings.



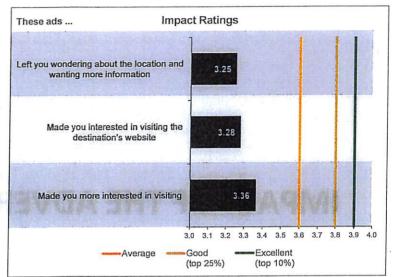
OREATING EVALUATION





Impact Ratings

- Impact ratings have slightly different benchmarks as they require an action from the consumer, which is far more difficult than just communicating a desired message.
- Again, SMARInsights has found that these attributes can be especially difficult to influence with media other than TV. For destination marketing, TV does the best job at building the brand, which generates interest in visiting.
- For making consumers want to take an action, including visit Jacksonville, the creative is performing below average.
- It is likely worthwhile for Visit Jacksonville to understand its competitive position through additional research and identify messages that would motivate consumers.





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Creative Messaging

- By understanding what motivates visitors to consider Jacksonville and how the area is currently performing, messaging can both appeal to what is motivating and improve the image of the city.
- Those activities in the upper right quadrant have both high correlation to interest in visiting and receive strong image ratings. These Strengths to Promote are more general travel requirements that don't focus on the area's unique product.
- The lower right quadrant contains attributes on which Jacksonville rates better than average but are not considered drivers.
- The upper left quadrant is motivating, but consumers don't have as strong a view of the city for these attributes. These are good components to feature in creative as they can improve the area's image and increase interest in visiting. Given that both being a place for couples and families count as Opportunities to Improve, it appears Jacksonville is an unknown to many consumers, offering the opportunity to build the image of the area.

INSIGHTS
Strategic Marketing and Research

Opportunities to Improve

An appealing place for couples/ adults Exciting and full of activities An appealing family destination Live theatre and music performances Museum and cultural activities Existing Strengths to Promote

A good value for the money Clean and attractive Has a wide vainety of things to see and do Dining and food scene Easy to get around once you're there

Jacksonville Rating

Driver Strength

Items to Monitor (weak driver & lower rating)

Historic sites and landmarks Activities for children Pedestrian friendly Existing Strengths to

Maintain

weak driver & strong rating)

Friendly people
Sporting events and activities
Easy to get to
A place where I feel safe





IMPACT OF THE ADVERTISING



23



Impact on Image

- While the goal of destination marketing is to generate additional visitation, there are other ways in which the advertising can have an influence. This includes improving the image of the destination.
- Overall, Jacksonville has a relatively undefined image, with many attributes receiving 3.5 or a lower rating. However, awareness of the paid media pushes the image for all attributes considerably higher.
- The attributes considered Opportunities to Improve, where the rating is below average but there is a strong correlation to interest in visiting, are in bold. Given the strong correlation to interest in visiting overall, these are likely things that would be featured in Visit Jacksonville messaging.

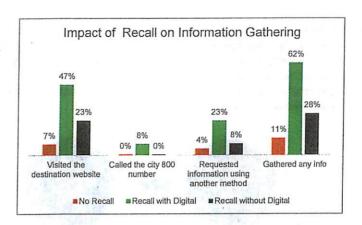
一次 10 10 10 10 10 10 10 1	No Recall	Recall	Difference
Its appeal as a place to go for couples/ adults	3.0	3.7	0.7
Dining and food scene	3.2	3.9	0.7
Exciting and full of activities	3.0	3.6	0.7
Easy to get around once you're there	3.0	3.7	0.6
Sporting events and activities	3.1	3.7	0.6
Museums, arts and cultural activities	2.9	3.5	0.6
Entertainment and night life	3.0	3.6	0.6
Has a wide variety or lots of things to see and do	3.0	3.7	0.6
Good value for the money	3.1	3.7	0.6
Easy to get to	3.3	3.9	0.6
Live theater and music performances	2.9	3.4	0.6
Historic sites and landmarks	2.9	3.5	0,6
Clean and attractive	3.1	3.7	0.6
Activities for children	3.0	3.5	0.6
Friendly people	3.2	3.7	0.6
s a place where I feel safe	3.1	3.6	0.6
Its appeal as a family destination	3.0	3.5	0.5
Pedestrian friendly	3.0	3.5	0,5





Impact on Information Gathering

- In addition to building the image of the destination and community, destination marketing can spur consumers to gather information.
- Visit Jacksonville spends significant digital resources on retargeting efforts, delivering digital ads to consumers after they have searched for the city in some way. Given this, those with recall of digital components of the campaign are far more likely to have gathered information. However, rather than spurring consumers to get information, with retargeting, it is likely the ads were delivered after they were already gathering information about Jacksonville.



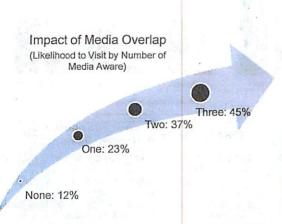


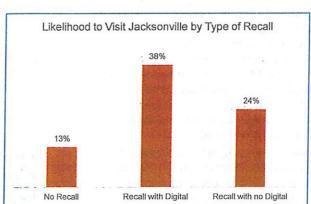
25



Impact on Likelihood to Visit

- Paid media generates travel to a destination, but it can also plant the seeds for future travel. In doing so, it can impact the likelihood to visit sometime in the future. Recall of the paid media encourages visitation, but when exposed to multiple campaigns, interest increases considerably.
- Again, recall of just print or out of home increases interest in visiting. But given the dramatic increase in interest by those exposed to digital, it is likely that retargeting is reaching those who already intend to visit.









Incremental Travel

SMARInsights' methodology for measuring the impact of destination advertising relies on establishing a base rate of travel. Certainly, there would be travel to Jacksonville even without any paid advertising. Thus not all visitation, or even visitation by aware households, is attributable to the ads. In this evaluation, the level of travel among unaware households is considered the base and what the area would see without the marketing campaign. Accordingly, any travel above that base by aware households is what is considered influenced. As such, this is a very conservative measure of influence.



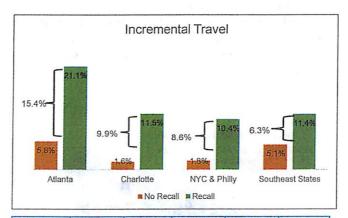


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Influenced Trips

- Overall, the Visit Jacksonville media placed between October 2016 and September 2017 influenced more than 600,000 trips to the area. While the travel increment is highest in Atlanta, it is a smaller market. The Southeast States have the smallest increment, but it is applied to more than 3.8 million aware households.
- Ideally, destinations would deliver different creative for brand messages as retargeting. Without that differentiation, the incremental travel is likely an overstatement of the number of trips that were influenced because of the campaign. SMARInsights often sees incremental travel rates around 3%-5%. With considerably higher increments, it is likely some of the aware travelers were delivered marketing messages after they had already decided to visit.
- Rather than reaching those already searching for Jacksonville information, the leisure marketing can have the most influence by encouraging consumers to bring Jacksonville into their consideration set.



	Atlanta	Charlotte	New York/Philly	Southeast States	Total
Aware HHs	757,055	350,124	2,417,662	3,870,753	7,395,594
Incremental travel	15.4%	9.9%	8.6%	6.3%	8.1%
Influenced trips	116,268	34,693	207,677	243,872	602,509





RETURN ON INVESTMENT



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Return on Investment

- The average ROI for local DMO campaigns that SMARInsights sees is \$144. With an overall return of \$642 for every \$1 spent on paid media, the Jacksonville campaign far outpaces the average.
- Again, there is certainly a role for retargeting to influence additional visitor spending by encouraging those already planning to visit to stay longer and do more on their Jacksonville trips. But it is possible the rate of influenced trips here is overstated, especially considering the return on investment is more than four times the DMO average.

County on some designed dates	2016-17 Influence
Influenced trips	602,509
Visitor spending	\$732
Influenced visitor spending	\$441,036,535
Media spending	\$687,154
Return on investment	\$642



Impact on Room Nights

- Visit Jacksonville relies on funding from a lodging tax, so it is especially important for the leisure marketing to generate paid room nights. Smith Travel Research shows Jacksonville to have had an increase in demand over the past year, with 2017 occupancy at 73.3% for Duval County.
- Of the influenced trips, just more than half stayed overnight in paid lodging. Given the average number of nights, this resulted in nearly 975,000 influenced room nights. During this same 12-month period, STR reports that total room demand was more than 4.9 million, making the campaign responsible for 20% of all room nights.

	Influenced Room Nights
Influenced trips	602,509
% staying in hotel	56%
Influenced trips with hotel lodging	337,156
Average number of nights	2.9
Influenced room nights	974,424
Total demand	4,856,472
% of room nights influenced	20%



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MAUTAR

TRIP SPECIFICS





Demographics

Destination advertising can be most effective when it reaches the same kind of audience as is inclined to visit. Jacksonville's paid media is reaching a slightly different audience as is visiting. Visitors tend to be older and wealthier, while the advertising is reaching a younger, less affluent audience. In order to get a better sense of how well the marketing is reaching typical visitors, Jacksonville should review the demographics against available provide data.









	18-34	35-54	55+	Married	Kids in HH	High School or Some College	College Grad or Higher	Under \$50K	\$50K- \$100K	Over \$100K
Aware Household	40%	35%	25%	56%	41%	38%	62%	32%	44%	23%
Visitors	34%	42%	24%	65%	40%	39%	61%	26%	45%	29%



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Trip Details

- As Visit Jacksonville makes decisions about where and how to invest future resources, it is useful to understand the kinds of trips that visitors are taking to the city.
- Again, those being delivered retargeting messages likely already know they are going to be visiting Jacksonville. With this, those aware of the advertising are more often staying with friends and family. It is likely they have already decided to visit, then search for specific information about Jacksonville attractions or booking and are subsequently delivered advertising materials.
- Although the retargeting creative is brand-centric, in the end it gets those aware of the advertising to stay longer and spend more. Future retargeting messaging should focus on getting these visitors who are already coming to do more on their trip since they have already made the decision to visit.

	Overall	Unaware	Aware
Paid accommodation	56%	57%	55%
Stayed with family or friends	27%	24%	30%
Nights in Jacksonville	2.9	2.5	3.2
Kids on trip	34%	27%	38%
Trip spending	\$732	\$482	\$928

	Overall	Unaware	Aware
The area has a variety of things to see and do	14%	3%	21%
You just wanted to see what the area had to offer	23%	29%	18%
You were attending a specific event	16%	18%	15%
It was a good value for the money spent	14%	17%	13%
You got a recommendation from a friend or relative	11%	10%	12%
You had business in the area	9%	10%	9%
You wanted to experience the area's cultural institutions	4%	2%	6%
You wanted to see one of the area's sports events	3%	2%	4%
You wanted to go to a specific attraction	6%	9%	4%





Trip Activities

- SMARInsights consistently finds that the top trip activities across destinations, seasons, and markets include shopping and dining. But these are the necessary components of a trip and are not what make a destination unique.
- What varies among destinations is how motivating those activities and attractions are. Activities with low participation often are highly motivating as they are important to a narrow audience.
- Product best featured in destination marketing are those attractions and activities that are unique to the area and have high participation. For Jacksonville, this includes the beaches, Riverwalk and art museum.

	Overall	Unaware	Aware
Shopping	34%	27%	39%
Beach activities	32%	13%	44%
Family friendly activities	26%	24%	28%
Fine dining or eating at a unique local restaurant	25%	23%	27%
Jacksonville Beaches	24%	21%	26%
Riverwalk	19%	12%	24%
Art museum	18%	11%	23%
Jacksonville Zoo & Gardens	16%	21%	12%
Entertainment and night life	15%	6%	21%
Beaches Museum and History Park	12%	5%	16%
St. Johns River Ferry	11%	9%	12%
Alhambra Theatre	8%	2%	11%
Botanical gardens	8%	0%	13%
A1A Ocean Islands Trail	7%	4%	9%
Boating, surfing or other water activities	6%	5%	7%
Biking	5%	5%	5%
Elbow Downtown	5%	0%	9%
Urban park	5%	0%	9%
Jacksonville Arboretum and Gardens	4%	2%	5%
Kingsley Plantation	4%	4%	4%
Museum of Science & History (MOSH)	4%	4%	4%
Camping or hiking	3%	0%	4%
Cummer Museum of Art & Gardens	3%	4%	3%
Fishing	3%	6%	1%
Fort Caroline National Memorial	3%	0%	5%
Little Talbot Island State Park	3%	5%	3%
Times-Union Center for the Performing Arts	3%	0%	4%
Timucuan Ecological and Historical Preserve	3%	0%	6%
904 Music Hall	2%	0%	3%
Catty Shack Ranch Wildlife Sanctuary	2%	4%	0%
Mayport Village	2%	4%	1%
Museum of Contemporary Art (MOCA)	2%	2%	1%
Riverside/Avondale Historic District	2%	0%	3%
lannah Park	1%	2%	0%
listoric Florida Theatre	1%	0%	1%
lacksonville Jaguar football game	1%	2%	1%
lumber of activities participated	3.3	2.3	3.9

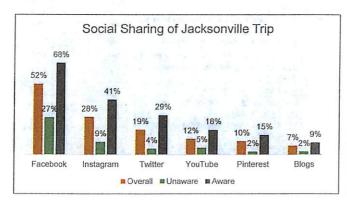


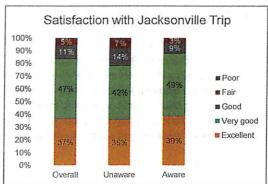
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Trip Sharing and Satisfaction

- Social media has become the new "word-of-mouth," and more than half of visitors post about their Jacksonville trips in some way. Those exposed to the advertising are significantly more likely to post about their trips, an indication they were likely already heavily invested in Jacksonville before their trip. This and the increased level of satisfaction by aware consumers again point to the influence of digital retargeting.
- But there is room for increased engagement, especially by unaware consumers. To increase social sharing, Visit Jacksonville could consider in-destination promotion of a hashtag to encourage visitors to post. Other DMOs have had success with this, which can also become a tremendous source of content.









Questionnaire

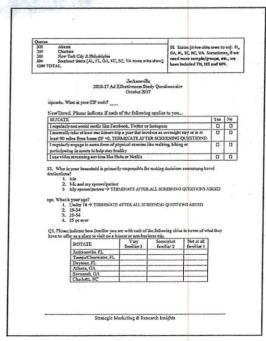
APPENDIX



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Questionnaire



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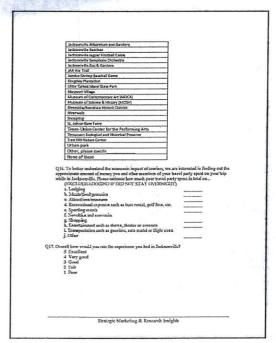
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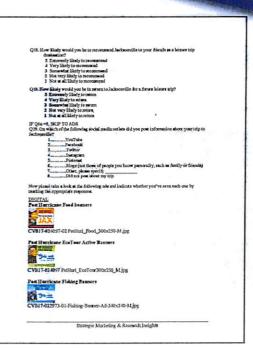


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Questionnaire

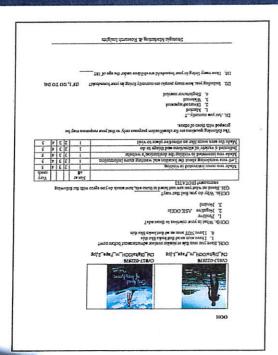


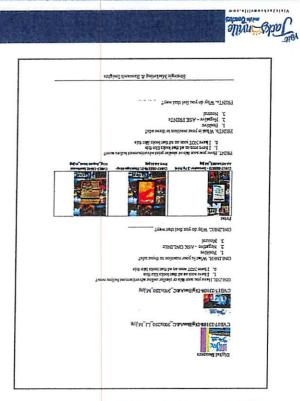






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Meetings Related Research:

Convention Market Demand Studies, Data Collection and interpretation for CVB

CBRE Los Angeles (offices in Atlanta also) – Monica Smith worked with CBRE in Newport Beach and Pasadena to obtain an assessment of convention group demand and recommend CVB convention sales goals. This developed and established credibility and understanding for CVB sales goals in the communities. Monica requested information and is awaiting the response.

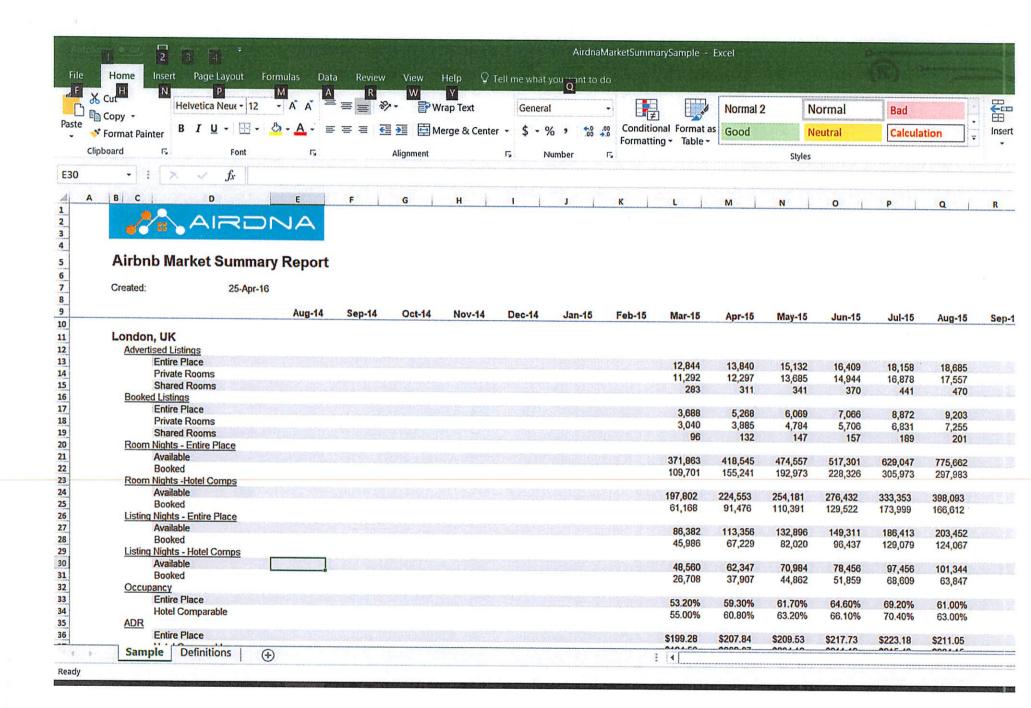
Additional Research Options, if funding allows:

AirBNB & Vacation Rental Reports (reports similar to STR reports for hotels)

AirDNA Solutions – see attached pricing and sample reports

Market Summary Reports - Track market changes using supply and demand trends. Used by lodging analysts, tourism agencies and asset managers to understand the growth of Airbnb, our Market Summary Reports provide a high-level overview of Airbnb rentals in major markets around the world. With RevPAR, ADR, occupancy, and monthly supply & demand trends. This report brings hotel-style performance metrics to the vacation rental industry.

- 100% coverage of the United States and 150 international markets
- Historical trends back to August of 2014
- Reports available for any MSA, city, zip code or neighborhood



AllTheRooms Analytics Reports – see attached sample reports

A monthly accommodations focused subscription product that will provide industry insights leveraging the world's largest and most complete accommodations database. Our mission to aggregate and catalogue every room on the planet provides us with a unique perspective on what is transpiring across the entire accommodation spectrum from short-term vacation rentals to hotels. Our ability to analyze macro and micro trends, by country, state, city, even neighborhood or specific property, is incredibly powerful. This report provides you with deep, unique insights into the entire accommodations space, including:

Vacation Rental and Airbnb Data

- Total Global Inventory Growth Trends Broken Down by Provider
- Total Global Instant Book Growth Trends Broken Down by Provider
- Total Inventory and Instant Book Growth Trends by top 10 cities
- Total Inventory broken down by Type and Category
- Airbnb Hotel Growth Trends, by Major Hotel Type and Location
- Top 10 Cities Airbnb ADR, number of properties, nights booked, occupancy rates and
- gross revenues broken down by total, instant book, shared rooms, private rooms and
- entire homes
- Inventory Churn Reports for Top 10 Cities and Top 10 Countries
- Overlap Analysis and Matrix for Top 10 Cities
- Projected Forward Calendar for Top 10 Cities
- Occupancy Rate and New Listings Alerts
- Customized Competitive Intelligence Reports by Specific Geocode and Address by 1/2 mile,
- 5 mile and 10 mile distributions
- Global Macro Accommodations Listing by Region, Country and City

Vacation Rental Growth Trends

• You'll be provided with reports on Airbnb and vacation rental growth trends, including 'instant book' growth trends. These will be broken down by the top 10 cities and top 10 countries worldwide.

Gross Revenues and Booking Rates

Analytics on vacation rental gross revenues, total properties, average nightly rates, nights booked and booking
rates. These will be broken down by the top 10 cities and top 10 countries, and they will include monthly trends
within the countries and cities.

Churn Analysis and Overlap Analysis

• A monthly Airbnb churn analysis, which will be formatted by the top 10 cities and the top 10 countries. This will show you how much inventory is falling off Airbnb on a monthly basis. We will provide you with analytics on the overlap in inventory between Airbnb, HomeAway, Booking.com and TripAdvisor. This will be updated monthly and broken down by the top 50 cities and top 10 countries. Meanwhile, there will also be analysis on hotel trends, showing the total inventory breakdown, ADR, occupancy rate, and more.

Airbnb and Other Vacation Rental Provider Data

- Unique insights into Airbnb's inventory, including weekly and monthly total inventory growth trends and total instant book trends. There will be analysis on its inventory growth and inventory 'instant book' growth (both by the top 10 cities), alongside its inventory broken down by type.
- Meanwhile, we'll provide you with further information on Airbnb hotel growth trends (broken down by hotel type and name), Airbnb ADR, the number of properties, the number of nights booked, the occupancy rate, and gross revenues broken down by total, instant book, shared rooms, private rooms and entire homes for top 10 cities. This will be in addition to the churn reports and overlap analysis with the above mentioned OTAs.

Daily Occupancy Rate and New Property Listing Alert

 Our occupancy rate alert feature allows for daily utilization and occupancy alters down to specific individual properties. The report provides individual property details including: trailing and projected ADR, trailing and projected occupancy rate, nights booked, property level description and links to image gallery and URL.

Competitive Intelligence Reports

Customized competitive intelligence reports providing access to ADR, number of properties, nights booked, occupancy rates, gross revenues broken down by total, instant book, shared rooms, private rooms and entire homes showing the impact that surrounding properties have on a specific asset. Reports are customized based upon geocode or specific address and provide data based on 1/2 mile, 5 mile and 10 mile distributions.
 Competitive intelligence reports also provide access to specific competitor sets and property level details.

Global Inventory

 Our macro report provides insights into the entire global accommodations market and includes online hotels, offline hotels, multi-room dwellings, vacation rentals and non-traditional listings broken down by region, country and city.

