**MARKETING SERVICES**
YEAR 2 ANNUAL PLAN

daltonagency

Visit Jacksonville and the Beaches

# EXECUTIVE SUMMARY

2017-2018 has been an exceptional year for our marketing efforts. Our new "Jax. It's Easier Here." campaign is already showing impressive results. Our advertising this year is performing well across our target markets. We are excited for the new content we have developed and what we have in the works for the coming months. We are continually exploring new ways to optimize everything we are doing and adjusting anything that isn't performing at the highest level.

The beginning of this year was a challenge; Hurricane Irma had wreaked havoc on our City's image and it was an uphill battle to convince potential travelers to consider Jacksonville. Even though visitors continued to arrive, those looking at our website and advertising decreased. Thankfully, it only lasted until the end of November when we began to see an increase in the interest once again. The launch of the new campaign was an instant hit! We saw record numbers for December and January. The "Easier Here" idea, with its beautifully captured images and video, seems to resonate well with our audiences and we see visitation grow each month. Web traffic is still behind where we would like it to be this year, but visitation is on an upward trend, and advertising is performing well.

The destination sets record numbers for visitation. March was the best month in the history of tourism in Jacksonville. January & February were stronger year over year than previous years. The new campaign is still performing strongly. Since its launch in late December/early January it has driven website traffic and had strong click-thru rates. We ran a cable television, billboard, digital video and geofenced banners campaign in Atlanta in February-March and web traffic increased 25% from that city while it was running. A similar campaign will run in Savannah in June-July. Traffic to our website is up 16.8% since December 1st, when the campaign went into full swing and Jacksonville started to shake off the effects of Hurricane Irma.

In 2018-2019, there are several efforts that will further expand our marketing reach. We will increase the influencer marketing we started in 2018 and move it to be part of our media/press efforts, since the work required of our team is so similar for both with much less digital advertising. To expand our advertising campaigns (commercials, digital and outdoor billboard) that will run in Atlanta and Charlotte, we will plan guerilla style street marketing events in each destination.

With no expected slowdowns in the near future, 2018-2019 looks to be another successful year for tourism in Jacksonville. In the following Year 2 Plan you will find the individual strategies and tactics for this next fiscal year, which align with the 5-Year Comprehensive Plan that was approved in September 2017.

# Annual Metrics

## 2017-2018 Metrics Results (through 3rd Quarter):

| PERFORMANCE MEASURES | GOAL | Actual YTD | % of Annual Goal |
|---|---|---|---|
| An annual 5% increase in leisure market visitors/tourists as determined by the Longwood Travel USA Jacksonville Visitor Report | TBD by 2017 report | TBD | TBD |
| Tax Collections (5% increase in tourist Development tax collections) (Through April 2018) | $8,179,118 | $5,636,102 | 69% |
| Website Visits (10% annual increase in website traffic to the official tourism website) (Through May 2018) | 1,337,315 | 827,796 | 62% |
| Advertising Impressions (through March 2018) | 194,539,184 | 113,887,852 | 59% |
| Clicks/Engagement (through March 2018) | 479,136 | 344,186 | 72% |
| Email Opens (through March 2018) | 133,157 | 137,542 | 103% |
| Video Views (through March 2018) | 1,775,379 | 1,373,999 | 77% |

**Explanation of Metrics Not on Pace (75% of Annual Goal):**

- Website Visits: Through 3 quarters, paid media has driven 114,000 more digital media clicks to VisitJacksonville.com than it did in FY2017.  However, the overall losses seen in website traffic are based on organic traffic (i.e. a search engine).  There are a few reasons for this.  DMO sites across the country have been seeing a downturn in organic web traffic and a study revealed that the primary reason could be Google's increased prioritization of their own travel sites on organic searches.  Since we cannot possibly compete with Google from that standpoint, we would like the TDC to consider changing this metric for FY 2018-19 as mentioned below.

- Advertising Impressions: FY 2018 impressions will likely fall below projections for the year. This is not due to under-delivery of placements purchased on CPM (cost per thousand impressions), but rather from extreme overperformance of placements purchased on guaranteed clicks/engagements (CPC/CPE, where impressions must be projected). One placement performed so well (.58% engagement rate, versus our benchmark-backed estimate of 0.15%), that the partner needed 50 million fewer impressions than projected to satisfy their contracted clicks/engagement target resulting in the primary reason for this metric not meeting the goal.  Since the priority for advertising should be the action of clicking on an item, we feel this is a better metric of success than how many times the person actually saw the item.

- Clicks/Engagement:  This metric is expected to reach 100% of goal by 9/30/18.  Q1 and Q4 see a larger push on this metric.

## Proposed 2018-2019 Metrics (*Numbers will be inserted once we complete the fiscal year):

- We would like to propose a change in the measurement tactic for web traffic driven directly by paid media; rather than all traffic.
  - By excluding channels heavily dependent on factors beyond our control, we can more accurately assess the true influence of the campaign year over year.
  - Meet and pursue to exceed the 10% annual increase but remove organic traffic from the mix to remove the "Google" effect of prioritization to their travel sites.

- An annual five percent (5%) increase in the leisure market visitors/tourists as determined by the Longwood Travel USA Jacksonville Visitor Report

- An annual five percent (5%) increase in total tourist development tax collections

- Campaign Type Performance Metrics:  Provided in the Dalton Agency Plan

## Year 2 Advertising 2017-2018 Plan

Our Objectives for Year 2 include:
- I.  Increase awareness of Jacksonville among potential visitors.  (See also the Dalton Agency Plan components for additional specifics)
  - Proceed with the "Jax.  It's Easier Here" advertising campaign through Q1 of FY 2018-19 when consideration will be given to a new campaign effort.
  - Advertising will focus on our waterways, beaches, parks and outdoor adventure, cultural and historical resources, culinary aspects and sports.
  - Utilize media relationships to place more stories in publications and online showcasing Jacksonville as a destination to visit.
  - Push marketing through specific tactics (cable, digital & outdoor display) to Atlanta and Charlotte to sustain momentum established in Year 1.

- II.  Encourage potential visitors to plan a trip. (See also the Dalton Agency Plan components for additional specifics)
  - Drive traffic to our new website which offers visitors the ability to plan their trip to include all the specific activities of interest for their lifestyle.
  - Utilize advertising spending towards tactics that drive bookings, such as travel intent data targeting and IP address targeting.
  - Utilize campaign with ADARA, which utilizes first party travel path-to-purchase data from airlines, hotels, and other travel/transportation companies to reach those who are actively shopping/booking in real time.
  - New campaign with Trip Advisor to reach users mid-funnel when they are actively searching for content around Jacksonville or Florida on tripadvisor.com. Also target users who are looking for information relating to the outdoors, history, culture, arts, and food.

    o   Utilize a paid search campaign which reaches the lowest hanging fruit – those qualified hand raisers who are actively looking for information about Jacksonville.

III.   Create a "visitor experience" through the advertising media.
- o   Work with Influencers - Leverages travel + lifestyle influencers to create and share content that features their experiences in Jacksonville relating to active/outdoor, history/culture/arts and culinary. We will support boosted social posts via the advertising budget (more specific details follow in the tactics below).
- o   Advertise and promote new videos, audio tours/podcasts, and itineraries through social media and digital advertising based on categories provided in 5-year plan.

IV.   Determine when to implement our next campaign push for FY 2018-19
- o   The "Jax. It's Easier Here." Campaign is still a strong performer. As such, we will utilize this campaign into the first quarter of FY 2018-19. During the first quarter of FY 2018-19 we will review research and analyze our annual metrics to determine what the next shift in our focus will be. TDC will be kept aware of all campaign efforts and options considered. Any monthly decline in the current campaign will result in a higher prioritization to a new campaign effort.

## Public Relations/Communications

**Objectives:**
1. Grow awareness of Jacksonville as a tourism destination by showcasing our main attributes: Water recreation, nature adventures, community arts and culture and big sporting events.
2. Increase the number of publications, news channels, websites and blogs featuring stories about Jacksonville.

**Strategy:** Story Development and Media Outreach

**Goal:** To place 50 stories in media outlets in FY 2018-2019

**Tactics:**
- Promote Jacksonville as a major Florida tourism destination to lifestyle and travel publications, outlets and media across the nation. We will highlight the overall destination based on current travel media trends.
- Develop story ideas and media pitches based on destination research and content created under the 5-Year Plan from the Marketing Plan Year 2. That will include:
  - o   Water Recreation: Promote Jacksonville's countless water activities, easy water access river and beaches.
  - o   Nature/Outdoors: Parks itineraries and highlights, unique camping spots in Jacksonville, hiking in Jacksonville, biking trails in Jacksonville, Fishing in Jacksonville, best local beaches, weekend getaways to Jacksonville's beaches, watersports in Jacksonville, water tours in Jacksonville.
  - o   History/Culture/Arts: Museums passport, Downtown Jacksonville's history, history tours in Jacksonville, historic homes and people of Jacksonville
  - o   Sports: Surfing culture in Jacksonville, Florida vs. Georgia experience, Jacksonville's NFL experience, NCAA Tournaments

- o Food Culture: Best local food in Jacksonville, craft cocktails and spirits, farmers market in Jacksonville
  - o Holiday attractions and concerts
- Pursue leveraging the Marketing team's advertising buys to garner incremental earned media.

**Strategy:** Host Media Blitz Events

**Goal:** To host four media events in top Jacksonville visitor markets

**Tactics:**
- Plan, coordinate and execute four media events in top Jacksonville visitor markets. Group dinners/special events where Visit Jacksonville will share Destination Jacksonville story ideas with media and establish/maintain relationships with media (Based on 2017 top website visitation markets):
  - o Atlanta
  - o Washington, D.C.
  - o Chicago
  - o Tampa/Orlando
- Secure deskside appointments with media who cannot attend events at each destination.

**Strategy:** Attend Media Travel Shows

**Goal:** To attend three media travel shows and one media conference in FY 2018-2019

**Tactics:**
- Visit Jacksonville to attend the International Media Marketplace (IMM) and the New York Times Travel Show (January 2019).
- Visit Jacksonville to attend the Chicago Travel & Adventure Show in February 2019. This show is an adventure-focused travel tradeshow.
- Visit Jacksonville to attend IPW Media Marketplace in 2019.
- Visit Jacksonville to attend the Public Relations Society of America Travel and Tourism Conference in 2019.
- Secure deskside media appointments with national and regional consumer travel and lifestyle media in all destinations visited during Travel Shows.

**Strategy:** Host Media Site Visits

**Goal**: To host 20 media site visits and two media FAMS in FY 2018-2019

**Tactics:**
- As part of a larger Visiting Journalist Program (VJP), secure individual press visits for national and key market regional outlets, including online, print, and broadcast.
  - o On a case-by-case basis, arrange individual press visits for media, bloggers and (unpaid) social media influencers, with a level of support equal with the size of the publication's or influencer's audience. Expectation: More than 30 writers annually.
- Secure 4-8 writers from national and key market regional outlets to visit Jacksonville on two themed press visits:

o Sports: Unique venues, teams and tailgate like locals (Fall 2018)
o Nature + Outdoors: Waterways/Fishing & Diving (Spring 2019)

**Strategy:** Local Editorial News Bureau

**Goal:** To establish relationships with four local media outlets in FY 2018-2019

**Tactics:**
- Expand relationship with local Jacksonville media to expose all events and current tourism affairs to residents.
  o A weekly column in local media outlets focused on attractions and things to do for residents.

## Website

**Strategy:** With our new website launched this July, we are excited to work towards optimizing it to provide even better user experiences. The new site allows more flexibility than the last site and makes it easier to find information that might encourage visitors to stay longer and explore more.

**Goals:** To increase paid media visitors to VisitJacksonville.com 10% over fiscal year 2017-2018 numbers

**Tactics:**
- To develop new content based on what potential visitors are searching for (data provided through research).

- To create more long-tail URLs to ensure that Visit Jacksonville's website appears in any web searches having to do with travel to Jacksonville.

- To regularly add new photography and video content so there are new things to see if visitors return to the site.

- To grow the new section added on the site called "Travel Tools" which was built for those travelers that have already booked their trip but now may be looking for more detailed information on things to do, how to get around and where to eat once they arrive in Jacksonville.

## Social Media

**Strategy:** To grow the engagement of our audiences through all social media channels, with a special focus on Instagram and Facebook. We will stay aware of new emerging social media programs that may grab a large audience. Facebook and Instagram, the primary channels for selling to potential visitors, have made it even harder to reach new potential visitors without paying for promoting posts. For the upcoming year, we will need to advertise or "promote" more individual posts using social media advertising dollars.

**Goals:** To increase engagement rates 10% within our fanbase; to increase audiences on all channels by 5%.

**Tactics:**
- To gather user generated content and share it with our audience.

- To work more closely with event promoters who are bringing their events to Jacksonville.
- To constantly develop new content to share through our channels.
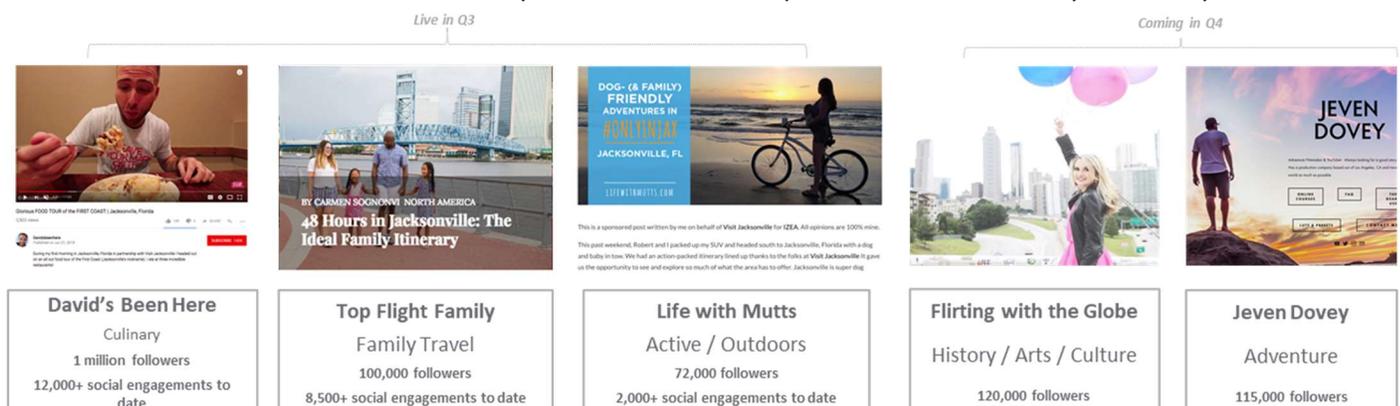
# NEW! Influencers

**Strategy:** Influencer marketing is an emerging marketing tactic that focuses on influential individuals who have large fan bases to share information on traveling to Jacksonville. It's a hybrid of paid media and earned media. The influencers perform similarly to media visits but are paid for their time and influence. By identifying individuals that can influence potential consumers to take a trip to Jacksonville it can successfully introduce the destination to large audiences via a trustworthy source, in their eyes.

In 2017-2018, we experimented with influencer advertising and thus far it has been successful. There are plans to develop these opportunities even further in 2018-2019. Some interesting research on influencer marketing:

- The influencer market is estimated to be worth $2 billion in 2017 and is set to reach $10 billion by 2020. (SOURCE: Adweek 2018)
- According to a study, 67% of marketers think influencer marketing campaigns helped them reach a more targeted audience, thus leading to more impactful results. (SOURCE: Activate by Bloglovin')
- According to a study, consumers trust influencers 3x more than ads (SOURCE: Nielsen Global Trust in Advertising Survey, 2012).

The funds for the current efforts were included within the Digital Advertising budget in 2017-2018, but after hosting these influencers first hand, it is better classified as a "site visit" type expense where we pay for travel and fees, not digital advertising.

In 2018, we hosted four influencers to date, with one more visiting in September, and have seen remarkable results even though we are just midway through this campaign. The influencers were chosen due to their large followings on their social media accounts and their fanbases within the branding focuses that we are trying to reach: adventure and outdoors; arts, history, and culture; active sports adventure; culinary and family.



| David's Been Here | Top Flight Family | Life with Mutts | Flirting with the Globe | Jeven Dovey |
|---|---|---|---|---|
| Culinary | Family Travel | Active / Outdoors | History / Arts / Culture | Adventure |
| 1 million followers | 100,000 followers | 72,000 followers | 120,000 followers | 115,000 followers |
| 12,000+ social engagements to date | 8,500+ social engagements to date | 2,000+ social engagements to date | | |

After just a few weeks of this campaign, post results for just the first two influencers that visited (Top Flight Family and Life with Mutts) were strong:

- 19 pieces of content had been posted

- 1,587,905 impressions had been served
- 39,095 video views
- 21,918 likes on the content and 437 comments

We anticipate with David's Been Here even stronger results because he has over 1 million followers and created 5 videos (even though only contracted and paid for one).

**Goals:** To host 12 influencers in 2018-2019 and for them to reach audiences of 5 million total followers for all influencers.

**Tactics:**
- Identify top travel influencers in the adventure, nature, lifestyle, food, sports, arts and culture spectrum on Instagram and Twitter and contract them to expose our destination to their audience.
- Arrange trips for them to experience Jacksonville's highlights first hand.
- Plan influencer trips around large events to show off the destination at its best.

## Content Development

**Strategies:** To have new monthly content to share with our audiences with a focus on our key attributes. Video still is the best performing advertising tactic, primarily through social media. We will add video assets and new tours annually.

**Goals:** To develop 24 new blogs and videos.

**Tactics:**

- New photography and video efforts for those activities we don't have photos of, including 360-degree videos.
- Development of new content where it may be currently lacking based on the Marketing Plan Content Calendar
- Efforts and focus on featured parks.
- Proposed new videos:
  - Jacksonville Watersports
  - Jax Ale Trail
  - Individual videos for Jacksonville neighborhoods (Riverside/Avondale, San Marco, Mandarin, Arlington)
  - More 360/VR videos for new gallery onsite
  - New Downtown nodes at Friendship Fountain and the Times-Union Performing Arts Center (if complete)
  - Other video subjects that may arise from research and collateral development
  - New commercial should campaign change
- Proposed new brochures:
  - Jacksonville's watersports & related tours
  - Craft Cocktail Bars/Rooftop Bars
  - Biking & Hiking Brochures
  - Public Art

- Proposed new self-guided tours:  print, audio/podcast
  - Historical sites tour throughout the destination (print and audio/podcast)
  - Individual neighborhood tours of neighborhoods listed above (print first, then audio)
  - Public Art Tour (audio) – if possible featuring the artists telling audience about their work
- Proposed new experiences and itineraries:
  - Parks itinerary for Pumpkin Hill/Betz-Tiger Point/Cedar Creek
  - Watersports itinerary
  - Waterways tours activities itinerary (River Taxi, Exchange Island, kayaking, etc.),
  - Completion of Cultural Passport
  - Museums Passport
  - Additional new experiences developed throughout the destination

- Phone App: In Year 2 research will be completed to determine if we are going to partner on an app with another company or build our own.

## Consumer Mass Email

**Strategies:** To grow the email database and to exceed the current levels of engagement.

**Goals:** To grow our leisure email database by 10% in 2018-2019.

**Tactics:**

- Send monthly emails to each of the personas we have established over the last five years.
- Further categorize our followers to be able to provide them with relevant content of interest.
- Promote large trip-worthy special events.
- To share video and photos through the emails sent to encourage more visitors to come to Jacksonville.

## NEW! Out-of-Market Outreach/Promotional Events

**Strategies:** To host an event in a city where we are running advertising in order to further the Jacksonville image. To plan an event, have a booth at an existing event, or plan an out-of-the-box display in a high traffic area in coordination with advertising campaigns that would engage potential visitors and have the potential for media coverage in these cities.

**Goals:** To host two out of market city events

**Tactics:**

- These strategies will be planned around existing media trips to coordinate the effort and reduce any potential additional travel expenses in the first year of trying out this effort.
- Potential locations already being visited include:  Atlanta & Charlotte and this tactic could be utilized

along with the media mission.

- This marketing tactic involves working with an external "guerilla" team to target events that may coincide with an event Jacksonville generally features (i.e. Jazz Festival).

**FY2019 VISIT JACKSONVILLE MEDIA RECOMMENDATION: LEISURE | 8.9.2018**

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# AGENDA

Media Objectives

Planning Parameters

Target Audience Analysis

Q3 Results

Strategic Approach

Media Tactics

Investment Summary

Campaign Measurement

# MEDIA OBJECTIVES

Increase awareness of Jacksonville among potential visitors

Encourage potential visitors to plan a trip

Create a "visitor experience" through the media

# PLANNING PARAMETERS

# TARGET AUDIENCE

Continue support of our three primary segments, with Culinary remaining a secondary target

| ACTIVE/OUTDOOR | HISTORY/CULTURE/ARTS | SPORTS |
|---|---|---|
| Adults 25-54<br><br>Interested in nature, outdoors, recreation, adventure, boating, hiking, biking, kayaking, parks, diving, rowing, waterway activities/tours, etc. | Adults 35-64<br><br>Interested in public art installations, significant architectural structures, galleries, theaters, symphony, zoo, museums, historical self-guided tours, etc. | Primary: Adults 21-54<br>Secondary: Men 21-54<br><br>Large scale sporting events and targeted to markets where the local NFL team is playing the Jags away |

# GEOGRAPHY

Broad coverage of the **Southeast Region of the U.S.** (Florida, Georgia, Alabama, North Carolina, South Carolina, Kentucky, Tennessee, Louisiana, West Virginia and Maryland)

Focused local market efforts in **Charlotte and Atlanta**

Additional support for the following markets with higher than average potential for visitors **(Chicago, Dallas, Houston, Philadelphia, New York and Washington, DC)**

Sports focus on markets where the local NFL team is playing the Jags away **(Pittsburgh, Houston, Indianapolis)**
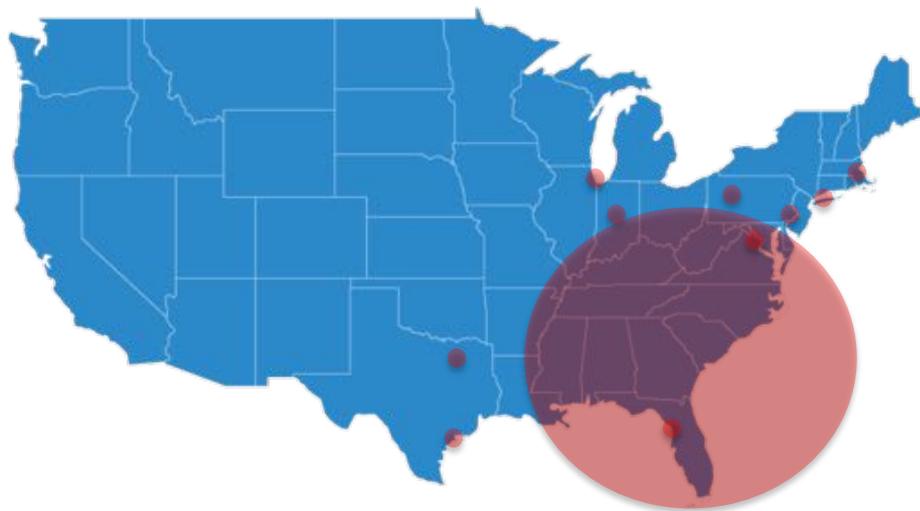
# TIMING AND SEASONALITY

October 2018 – September 2019

Greater focus on driving visitors for the following slower months:

October – January

July – September

# PLANNING BUDGET

Flat YOY

**$1,275,000 NET**

# TARGET AUDIENCE ANALYSIS

# TARGET AUDIENCE ANALYSIS



GfK MRI's Survey of the American Consumer® is the industry standard for magazine audience ratings in the U.S. and is used in the majority of media and marketing plans in the country

# TARGET AUDIENCE ANALYSIS

Provides richer, actionable data and insights in order to affect strategic media planning

| DEMOGRAPHICS | CONSUMER INSIGHTS | MEDIA CONSUMPTION |
|---|---|---|
| ▪ Age, gender, education<br>▪ Marital status<br>▪ Household & personal<br>▪ income<br>▪ Net worth<br>▪ Household/family<br>▪ composition<br>▪ Occupation, title, industry | ▪ Expenditure categories<br>▪ Buying styles<br>▪ Psychographic statements<br>▪ Sports & leisure activities<br>▪ Planned life events<br>▪ Public activities participated | ▪ Media brands<br>▪ Printed publications<br>▪ Television networks<br>▪ Independent websites<br>▪ Streaming services<br>▪ Social networks<br>▪ Radio networks<br>▪ Advertising touchpoints |

# TARGET AUDIENCE ANALYSIS

## WHO ARE THEY?

**ACTIVE/OUTDOOR**

- 24% of U.S. population
- 48% male, 52% female
  - 22% aged 25-34
  - 38% aged 35-54
  - 16% aged 55-64
- 70% are college educated
- 70% are employed
- Median HHI – $90,978
- 57% are married
- 42% have children at home

*Source: 2017 Spring Gfk MRI, Base: Adults*

**HISTORY/CULTURE/ARTS**

- 34% of U.S. population
- 45% male, 55% female
  - 17% aged 25-34
  - 33% aged 35-54
  - 19% aged 55-64
- 67% are college educated
- 58% are employed
- Median HHI – $68,103
- 55% are married
- 36% have children at home

**SPORTS**

- 30% of U.S. population
- 62% male, 38% female
  - 17% aged 25-34
  - 37% aged 35-54
  - 17% aged 55-64
- 58% are college educated
- 63% are employed
- Median HHI – $70,580
- 53% are married
- 40% have children at home

**CULINARY**

- 19% of U.S. population
- 40% male, 60% female
  - 20% aged 25-34
  - 39% aged 35-54
  - 16% aged 55-64
- 67% are college educated
- 66% are employed
- Median HHI – $82,821
- 59% are married
- 44% have children at home

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# TARGET AUDIENCE ANALYSIS

## *WHAT ARE THEIR ATTITUDES, VALUES + INTERESTS?*

"Spending time with my family is my top priority."

Active/Outdoor– 88% comp
History/Art/Culture – 88%
Sports – 86%
Culinary – 90%

"Investing for the future is very important to me."

Active/Outdoor– 85% comp
History/Art/Culture – 82%
Sports – 80%
Culinary – 84%

"I try to eat healthy these days and pay attention to my nutrition."

Active/Outdoor – 86% comp
History/Art/Culture – 85%
Sports – 82%
Culinary – 88%

Enjoying life: "Doing things because I like them."

Active/Outdoor – 93% comp
History/Art/Culture – 91%
Sports – 88%
Culinary – 94%

*Source: 2017 Spring Gfk MRI, Base: Adults*

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# TARGET AUDIENCE ANALYSIS

## *WHAT ARE THEIR ATTITUDES, VALUES + INTERESTS?*



### ACTIVE/OUTDOOR

- Actively participate in photography – Index 168
- Participate in environmental groups/causes – Index 160
- Heavy exercisers– Index 124
- "I consider my work to be a career, not just a job." – Index 120
- "Technology helps make my life more organized." – Index 114



### HISTORY/CULTURE/ARTS

- Photography Influentials – Index 143
- Music influentials - 134 Index
- Attend art galleries or museums – 131 index
- Participate in book clubs – Index 126
- "I am very interested in the fine arts." – Index 118



### SPORTS

- Take part in a fantasy sports league – Index 186
- Participate in tailgating – Index 167
- Finance/investment influential consumers– Index 136
- "I find the ups and downs of the financial markets exciting." – Index 117



### CULINARY

- They cook for fun – Index 178
- Entertain friends and relatives at home – Index 151
- People often ask their advice when it comes to food– Index 139
- People come to them for advice before making a purchase– Index 125
- "I enjoy being creative in the kitchen." – Index 120

*Source: 2017 Spring Gfk MRI, Base: Adults*

# TARGET AUDIENCE ANALYSIS

*WHAT ARE THEIR TRAVEL ATTITUDES AND INTERESTS?*



### ACTIVE/OUTDOOR

- I frequently choose active vacations with lots to do– Index 151
- Domestic travel activities: Backpacking/Hiking – Index 246
- Domestic travel activities: Bike riding– Index 222
- Amount spent on domestic travel last 12 months: $7,000+ — Index 171

### HISTORY/CULTURE/ARTS

- Category Influential Consumer/Vacation Travel – 127 Index
- Activities on domestic vacations: Visit cultural/historic sites– 132 Index
- Activities on domestic vacations: General sightseeing– 120 Index
- Amount spent on domestic travel last 12 months: $7,000+ — Index 118



### SPORTS

- Domestic Travel Activities: Play tennis– Index 158
- Domestic Travel Activities: Play Golf – 156 Index
- Category Influential Consumer/Business Travel– Index 119
- Amount spent on domestic travel last 12 months: $7,000+ — Index 124

### CULINARY

- Category Influential Consumer/Vacation Travel – 363 Index
- People often ask their advice when it comes to vacation travel – Index 121
- Activities on vacation: Fine Dining – 169 Index
- Amount spent on domestic travel last 12 months: $7,000+ — 164



*Source: 2017 Spring Gfk MRI, Base: Adults*

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# TARGET AUDIENCE ANALYSIS
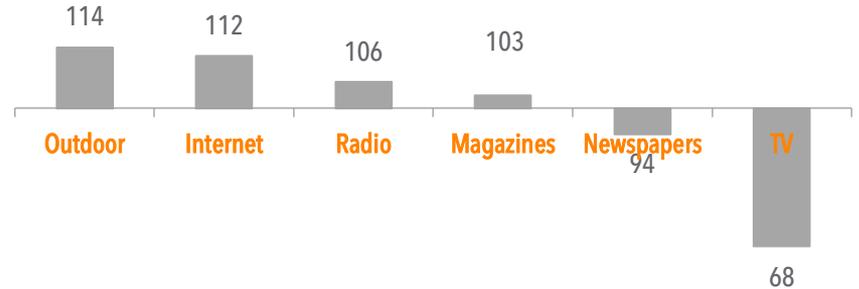
## *HOW DO THEY CONSUME MEDIA?*

Heaviest users of digital media and outdoor.

- Trust online content (Index 120), and magazines (120) more than other media.
- Use travel apps on their phones – Index 160
- Write online blogs – Index 151
- Make personal or business travel plans – Index 149
- Use smartphones to purchase products – Index 138
- Use social media, including, Facebook (69%), and YouTube (58%).

*2017 Spring Gfk MRI, Base: Adults, Heavy defined as Quintile I or II.*

**ACTIVE/OUTDOOR**

## Media Usage Heavy Quintile Composition Index

### (Adults = 100)

| Outdoor | Internet | Radio | Magazines | Newspapers | TV |
|---------|----------|-------|-----------|------------|-----|
| 114 | 112 | 106 | 103 | 94 | 68 |

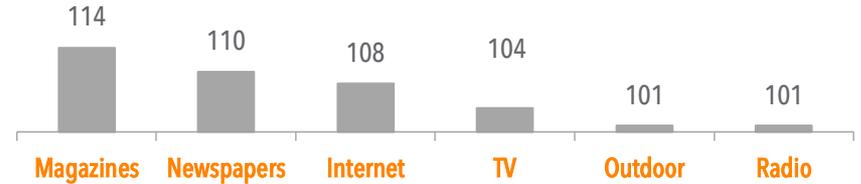# TARGET AUDIENCE ANALYSIS

## *HOW DO THEY CONSUME MEDIA?*

Heaviest users of print, digital media and TV.

- Read 9 magazines a month, are online for 22 hours a week, and spend 32 hours watching TV each week
- Visited a blog in the last 30 days – Index 120
- Obtain medical information online – Index 120.
- Obtain entertainment information online – 119 Index
- Use Facebook (66% comp) and YouTube (53%) the most of all social media channels.

*2017 Spring Gfk MRI, Base: Adults, Heavy defined as Quintile I or II.*

**HISTORY/CULTURE/ARTS**

### Media Usage Heavy Quintile Composition Index

**(Adults = 100)**

| Magazines | Newspapers | Internet | TV | Outdoor | Radio |
|-----------|-----------|----------|-----|---------|-------|
| 114 | 110 | 108 | 104 | 101 | 101 |

# TARGET AUDIENCE ANALYSIS
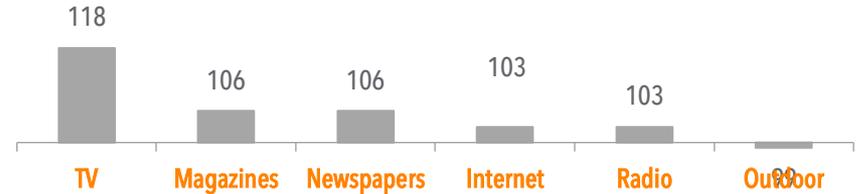
## *HOW DO THEY CONSUME MEDIA?*

Heavy users of traditional media, including TV and print media.

- Use their mobile phones to access the internet— 76% comp
- Use sports apps— Index 168
- Visit sports sites on their mobile device– Index 136
- Obtained sports/news information online– Index 129
- Watched live television on their mobile device– Index 129

SPORTS

### Media Usage Heavy Quintile Composition Index

(Adults = 100)

| TV | Magazines | Newspapers | Internet | Radio | Outdoor |
|----|-----------|------------|----------|-------|---------|
| 118 | 106 | 106 | 103 | 103 | 99 |

visit Jacksonville and the Beaches

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# TARGET AUDIENCE ANALYSIS
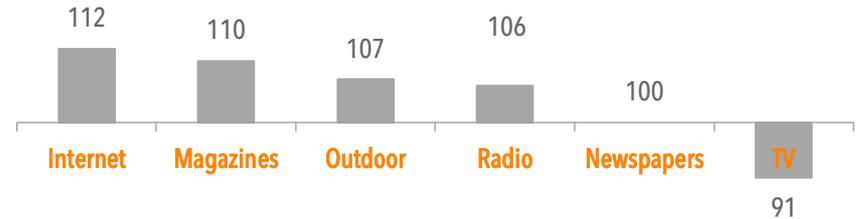
## *HOW DO THEY CONSUME MEDIA?*

Heavy users of digital media and magazines.

- Use their mobile device to access the internet – 84% comp
- Purchase products using smartphones – Index 150
- Redeem mobile coupons on their smartphone– Index 146
- Make travel plans online – Index 135
- Look for recipes online – Index 131

**CULINARY**

### Media Usage Heavy Quintile Composition Index

(Adults = 100)

| Internet | Magazines | Outdoor | Radio | Newspapers | TV |
|----------|-----------|---------|-------|------------|-----|
| 112 | 110 | 107 | 106 | 100 | 91 |

visit Jacksonville and the Beaches

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# Q3 RESULTS

# FY 2018 Q3 summary

LEISURE CAMPAIGN:

- **Hotels experienced their strongest April, May, and June in city history,** with downtown hotels posting a 15% gain in occupancy and 18% gain in RevPAR

- Paid media continued its strong performance, **tripling industry benchmarks** in clickthrough rate for the third straight quarter, **delivering half a million completed video views** for the period and driving **1,200% more trackable site traffic** than the previous year. Through three quarters, paid media has driven **114,000 more digital media clicks to VisitJacksonville.com than it did in FY 2017.** Losses in organic traffic continue to offset paid media gains, but **we believe we have identified the primary source for the decrease in organic traffic.**

- **Influencer marketing launched in Q3**, exposing Jacksonville to our influencers' **1.6 million social followers** across multiple social platforms. To date, the 19 posts published have resulted in over **25,000 social engagements**.

- Of the six million impressions with Adara pixels served in Q3, **129,341 prospects exposed to our media performed a hotel search for Jacksonville,** resulting in **6,307 room nights booked at close to $1 million in revenue,** along with **2,884 flight bookings, driven primarily by markets targeted by media in the last two quarters.**

- Through three quarters, VisitJax/Dalton Agency has already **reached its annual goal for email opens**, and is **on pace to hit goals for clicks/engagements, and video views**. We're tracking behind on impression projections, resulting from a vast overperformance of Pulsepoint native, which was purchased on guaranteed clicks rather than guaranteed impressions and needed 50 million fewer impressions than projected to reach its contracted click/engagement target.

# New In Q3 – Influencer Marketing

**Goal:** Work with multiple influencers with large numbers of **dedicated followers** to generate diverse content that will drive **interest** in the Jacksonville as a **travel destination**

*Live in Q3*

*Coming in Q4*

| **David's Been Here** | **Top Flight Family** | **Life with Mutts** | **Flirting with the Globe** | **Jeven Dovey** |
|---|---|---|---|---|
| Culinary | Family Travel | Active / Outdoors | History / Arts / Culture | Adventure |
| **1 million followers** | **100,000 followers** | **72,000 followers** | **120,000 followers** | **115,000 followers** |
| **12,000+ social engagements to date** | **8,500+ social engagements to date** | **2,000+ social engagements to date** | | |

Consumers **trust influencers 3x more** than ads (SOURCE: Nielsen Global Trust in Advertising Survey, 2012), making the content generated through this campaign very effective in driving **travel intent**

# Media Campaign Performance Summary

| Target Segment | Cost | Impressions | Clicks/Engagements | Video views | Email opens | Clickthrough Rate | Cost Per Click |
|---|---|---|---|---|---|---|---|
| All Target Segments | $ 50,514 | 4,118,223 | 19,473 | | | 0.30% | $ 1.94 |
| Active/Outdoor | $ 55,161 | 12,440,859 | 26,847 | 274,467 | | 0.22% | $ 3.91 |
| Culture/Arts/History | $ 29,628 | 3,024,374 | 11,157 | 181,830 | 25,782 | 0.34% | $ 2.86 |
| Culinary | $ 14,266 | 4,871,487 | 11,550 | 41,166 | | 0.32% | $ 2.11 |
| Sports | $ 2,900 | 2,500,000 | - | | | - | - |
| Grand Total | $ 152,469 | 26,954,943 | 69,027 | 497,463 | 25,782 | 0.25% | $ 3.19 |

*Clickthrough rate* measures the percentage of delivered digital ads that are clicked on vs. the number of digital impressions served.

For the quarter, **27 million impressions, 69,000 clicks, half a million video views, and 26,000 email opens** were driven.

The overall **clickthrough rate for the Leisure campaign in Q3 2018 was 0.25%, tripling the industry benchmark of 0.08% for the third consecutive quarter.**

# Media Campaign Performance by Segment

| Target Segment | Cost | Impressions | Clicks/Engagements | Video views | Email opens | Clickthrough Rate | Cost Per Click |
|---|---|---|---|---|---|---|---|
| All Target Segments | $ 50,514 | 4,118,223 | 19,473 | | | 0.30% | $ 1.94 |

Four media partners targeted **All Target Segments.**

Of these tactics, **paid search posted the strongest clickthrough rate (1.95%), while MNI Programmatic drove the lowest CPC ($1.39)**

Media partners/tactics for segment: Adara, MNI (paid search + programmatic display), Visit Florida, Targeted Spot Cable

| Target Segment | Cost | Impressions | Clicks/Engagements | Video views | Email opens | Clickthrough Rate | Cost Per Click |
|---|---|---|---|---|---|---|---|
| Active/Outdoor | $ 55,161 | 12,440,859 | 26,847 | 274,467 | | 0.22% | $ 3.91 |

Eight media partners targeted the **Active/Outdoor segment.**

**iExplore and the Pocket Ranger mobile app drove the most efficient costs-per-click.**

Media partners/tactics for segment: iExplore, Madden Media, MNI Programmatic, NCC Addressable, Digital OOH, Paid Influencer, Pocket Ranger Mobile App, and YouTube

# Media Campaign Performance by Segment

| Target Segment | Cost | Impressions | Clicks/Engagements | Video views | Email opens | Clickthrough Rate | Cost Per Click |
|---|---|---|---|---|---|---|---|
| Culture/Arts/History | $ 29,628 | 3,024,374 | 11,157 | 181,830 | 25,782 | 0.34% | $ 2.86 |

Six media partners targeted the **Culture/Arts/History segment.**

**Garden & Gun's email send pushed us over our FY 2018 goal for email opens.**

Media partners/tactics for segment: Garden & Gun, iExplore, Madden Media, MNI Programmatic, NCC Addressable, Digital OOH

| Target Segment | Cost | Impressions | Clicks/Engagements | Video views | Email opens | Clickthrough Rate | Cost Per Click |
|---|---|---|---|---|---|---|---|
| Culinary | $ 14,266 | 4,871,487 | 11,550 | 41,166 | | 0.32% | $ 2.11 |

Four media partners targeted the **Culinary segment.**

**All partners more than doubled industry benchmarks in clickthrough rate.**

Media partners/tactics for segment: iExplore, MNI Programmatic, NCC Addressable, Paid Influencer

| Target Segment | Cost | Impressions | Clicks/Engagements | Video views | Email opens | Clickthrough Rate | Cost Per Click |
|---|---|---|---|---|---|---|---|
| Sports | $ 2,900 | 2,500,000 | - | | | - | - |

Media partners/tactics for segment: Indianapolis 500 digital scoreboard only

# Media Campaign Goal Tracking

*Visit Jacksonville/Dalton Agency FY 2018 Goals*

| Metric | FY 2018 Goal | Expected YTD | Actual YTD | % Goal |
|---|---|---|---|---|
| Clicks/Engagements | 479,136 | 359,352 | 344,186 | 72% |
| Video Views | 1,775,379 | 1,331,534 | 1,373,999 | 77% |
| Email Opens | 133,157 | 99,868 | 137,542 | 103% |
| Advertising Impressions | 194,539,184 | 145,904,388 | 113,887,852 | 59%* |

- **YTD goals above are based on a quarterly average. However, campaign spend is paced seasonally, rather than evenly per quarter. Spend was reduced in Q3 due to budget allocation increases in Q4 intended to drive visitation during the slower summer season.**

- **We expect to hit our goals for Clicks/Engagements and Video Views in Q4.**

- **Our FY 2018 goal for Email Opens was met in Q3.**

- **FY 2018 impressions will likely fall below projections for the year. This is not due to under-delivery of placements purchased on CPM** (cost per thousand impressions)**, but rather from extreme overperformance of placements purchased on guaranteed clicks/engagements** (CPC/CPE, where impressions must be projected)**.** Placements through our primary native partner, Pulsepoint, have performed so well (.58% engagement rate, versus our benchmark-backed estimate of 0.15%), that they needed **50 million fewer impressions** than projected to satisfy their contracted clicks/engagement target.

# Traffic to visitjacksonville.com

## Visit Jacksonville Site Traffic (YoY)
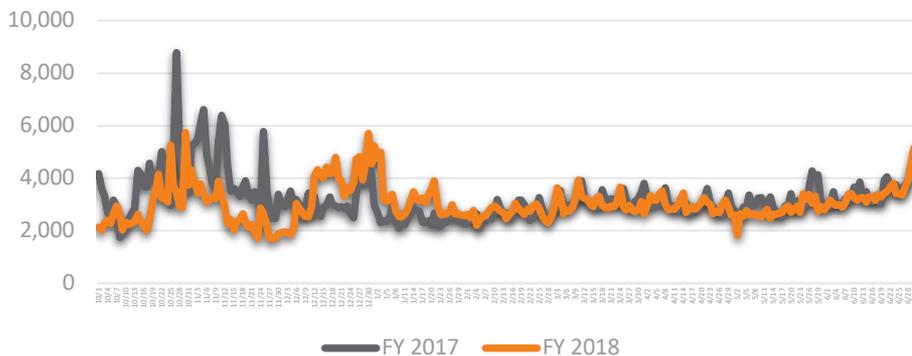


Despite continued strong performance from paid media, site traffic to VisitJacksonville.com was down **6.8% for Q3.**

**Fiscal year to date, traffic is down 5.5%.**

*VisitJacksonville.com – Site Visits*

| Month | FY 2017 | FY 2018 | YoY |
|---|---|---|---|
| Q1 Total | 333,641 | 284,097 | **-14.9%** |
| Q2 Total | 247,039 | 268,226 | **+8.6%** |
| Q3 Total* | 295,565 | 275,473 | **-6.8%** |
| YTD | 876,245 | 827,796 | **-5.5%** |

*When conducting year-over-year analysis for FY 2018 and FY 2017, approximately 30,000 bot-generated sessions were discovered and removed. Obvious bot traffic is fairly easy to identify, as it typically comes from an unfamiliar referral source, consists of 100% new users, and exits the site within milliseconds of arriving.

# Site Traffic By Channel

Advertising efforts continue to perform exceptionally well, with **trackable paid media driving nearly 1,200% more website visits in Q3 than FY 2017.**

Fiscal year to date, **paid media has driven 114,172 more clicks than 2017**, **equaling 97% of our annual website growth goal** with a quarter left to go.

Unfortunately, our **paid media gains continue to be offset by factors largely beyond our control** (Irma in Q1, along with **continued losses in organic traffic throughout the year**).

Referral traffic was predictably down in Q3 (a Yahoo article in 2017 drove unusually high referral traffic), as was direct traffic (new organic visitors often bookmark the site, becoming returning direct visitors; also, fewer Jacksonville residents coming to the site to look for events).

## SITE TRAFFIC BY CHANNEL (Q3)



| Channel | 2017 | 2018 | YoY (%) |
|---|---|---|---|
| Direct | 53,956 | 23,866 | -56% |
| Organic | 179,227 | 157,770 | -12% |
| Paid Media | 3,401 | 43,192 | 1170% |
| Referral | 11,682 | 2,978 | -75% |

# Organic Traffic

Taking a closer look at organic search traffic, which accounts for **close to 60% of all site traffic overall**, we can see **just how pronounced the effects of this drop are.**

When including organic traffic, **YoY traffic is down 5.68% through the end of Q3**. Excluding organic, however, we see that **all other channels (paid media, direct, referral, email) are up 23.48% for the year.**

*VisitJacksonville.com YoY Traffic – Organic Included*
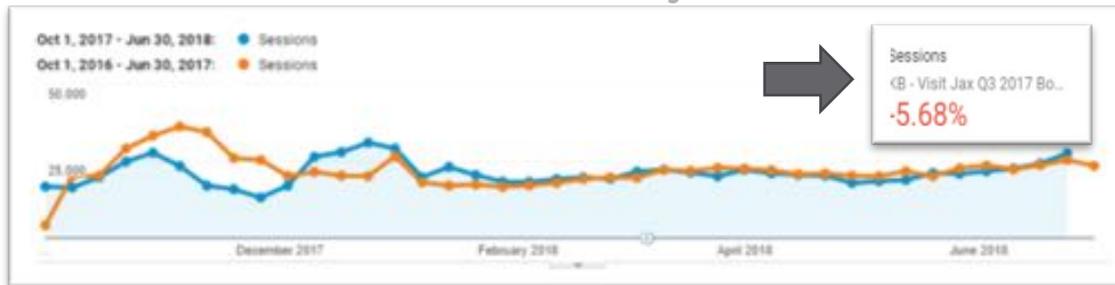


*VisitJacksonville.com YoY Traffic – Organic Excluded*
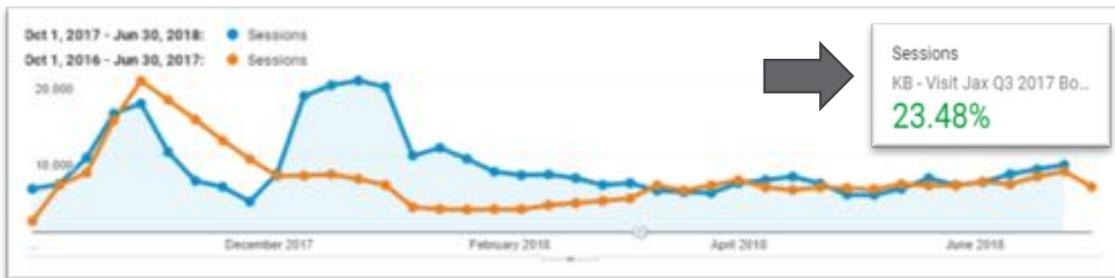
# Why is Organic Traffic Decreasing?

**Miles**, a worldwide marketing firm focused on travel and tourism, works with DMOs all over the nation. **After hearing from so many of their partners that organic traffic to their sites was struggling**, Miles conducted a study of website traffic of 26 American DMOs.

# Why is Organic Traffic Decreasing?

Miles discovered that in the **last several years, median year-over-year change in organic traffic has trended downward**, from 35% in 2014, down to 0% organic growth in 2017.

In other words, **half of all DMOs studied were losing organic traffic YoY, with this number expected to increase in 2018 based on the overall trend.**

*Flat-lining organic growth for DMOs*



Median YOY Change In Organic Search Traffic to DMO Websites
2014, 2015, 2016 & YTD 2017

35%  11%  12%  0%
2014  2015  2016  2017

# Why is Organic Traffic Decreasing?

In late 2016, **Google launched it's own travel service,** recently expanded to include curated travel guides**. When returning search results, Google's widgets are now given priority over all other results, including VisitJacksonville.com.**

**This isn't necessarily a bad thing** – Google's travel guide paints a very positive picture of Jacksonville, and the widgets simplify booking travel to the city.

That said, **these changes are having a pretty significant negative effect on organic traffic,** pushing VisitJacksonville.com (and DMOs nationwide) further down the page (or off the page entirely, on mobile devices), making it more difficult to acquire organic traffic on VisitJacksonville.com.
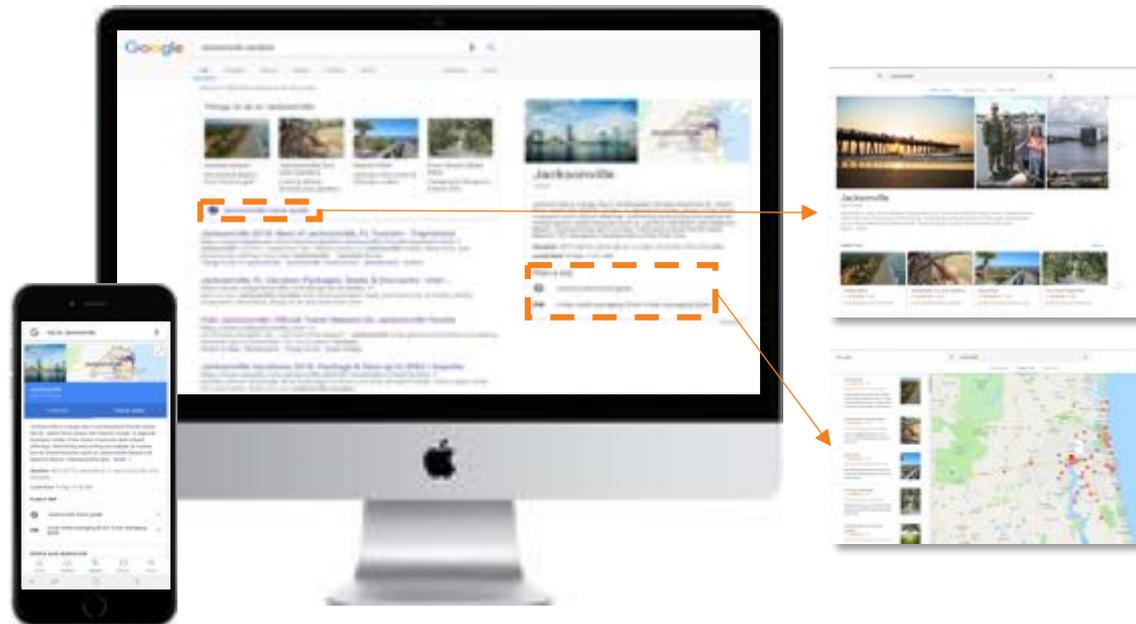
*Google Travel Widget/Travel Guides*

# What Can We Do About It?

- **Optimize what Google displays in its travel widget to make sure that Jacksonville is portrayed in the best light possible**.

  - Visit Jacksonville is considering a DMO partnership with Google, through Visit Florida, to make sure that our city's best assets and marketing collateral are featured in this strategically important space.

- **Continue with paid search and aggressively work to maximize SEO**

  - Content for the existing site, as well as the new website redesign, is being built to maximize search engine visibility for VisitJacksonville.com. **Though we can't leapfrog Google's own results, we should strive to be next in line.**

*Competition for organic traffic*
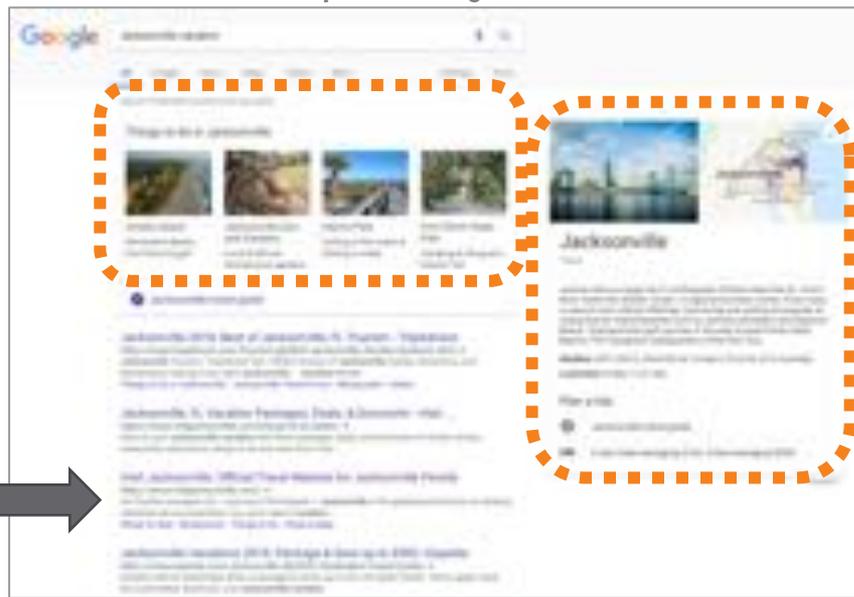
# Media Optimizations

To partially mitigate against these losses in organic traffic, **VisitJacksonville/Dalton Agency will shift a portion of our media budget towards the tactics driving the most traffic to VisitJacksonville.com**

- Specifically, **MNIx programmatic display will be reduced and budget will be shifted into paid search and Facebook traffic and video units, which drove a significant number of users to the site in Q3.**

- This shift will allow us to **drive additional site traffic, while not compromising our ability to hit our other goals for video views and clicks/engagements.**

# Site Traffic By Source

Despite losses in organic traffic, **Google continues to drive, by far, the most traffic to the site (56% in Q3),** followed by direct traffic (traffic from a bookmark, or where the URL was directly entered).

**Paid Search and Pulsepoint continue to perform strongly,** driving 14,000 and 12,000 visits to the site, respectively.

**Madden Media native,** with new articles launching this quarter, also showed strong performance, **driving nearly 10,000 visits.**

**iExplore, Paid Facebook, and MNI and Adara banner ads drove over 1,000 visits each as well.**

*Top traffic sources to VisitJacksonville.com*

| Rank | Source / Medium | Channel | Visits |
|------|-----------------|---------|--------|
| 1 | Google Organic | Organic | 169,549 |
| 2 | Direct | Direct | 27,321 |
| 3 | Paid Search | Paid Media | 14,204 |
| 4 | Pulsepoint | Paid Media | 12,308 |
| 5 | Bing Organic | Organic | 11,870 |
| 6 | Madden Media | Paid Media | 9,342 |
| 7 | Yahoo Organic | Organic | 6,506 |
| 8 | iExplore | Paid Media | 4,831 |
| 9 | Facebook | Paid Media | 2,444 |
| 10 | MNI Banner | Paid Media | 2,356 |
| 11 | Email Newsletter | Paid Media | 1,471 |
| 12 | Visit Florida/ Referral | Paid Media | 1,320 |
| 13 | Adara Banner | Paid Media | 1,070 |
| 14 | Dallas_Geofencing_Bike | Paid Media | 869 |
| 15 | OnlyInJax.com Referral | Referral | 859 |
| 16 | Dallas_Geofencing_Yoga | Paid Media | 850 |
| 17 | Dallas_Geofencing_Artsy | Paid Media | 823 |
| 18 | DuckDuckGo Organic | Organic | 618 |
| 19 | coj.net Referral | Referral | 323 |
| 20 | ewtn.com Referral | Referral | 319 |
| 21 | Savannah_Campaign / Brewery | Paid Media | 307 |
| 22 | Jaxport.com Referral | Referral | 298 |
| 23 | AOL Organic | Organic | 280 |
| 24 | Spartan.com Referral | Referral | 219 |
| 25 | Savannah_Campaign / March | Paid Media | 158 |

# Site Traffic by Market

**Top Markets by Traffic (Q3)**

| City | 2018 | 2017 |
|------|------|------|
| Jacksonville | 46,051 | 46,632 |
| Orlando | 24,946 | 35,811 |
| Atlanta | 9,484 | 11,379 |
| Miami | 6,409 | 3,011 |
| New York | 4,392 | 6,679 |
| Charlotte | 3,800 | 5,047 |
| Jacksonville Beach | 2,640 | 2,657 |
| Dallas | 2,568 | 1,098 |
| Tampa | 2,438 | 2,428 |
| Chicago | 2,165 | 2,917 |
| Fruit Cove | 2,124 | 2,343 |
| Boston | 2,053 | 532 |
| Houston | 1,635 | 3,570 |
| Washington | 1,523 | 1,967 |

**Top Growth Markets (Q3)**

| City | 2018 | 2017 | YoY (#) | YoY (%) |
|------|------|------|---------|---------|
| Boston | 2,053 | 532 | 1,521 | 286% |
| Dallas | 2,568 | 1098 | 1,470 | 134% |
| Miami | 6,409 | 3011 | 3,398 | 113% |
| Memphis | 727 | 342 | 385 | 113% |
| Virginia Beach | 590 | 309 | 281 | 91% |
| Cincinnati | 327 | 226 | 101 | 45% |
| Nashville | 1,398 | 1061 | 337 | 32% |
| Philadelphia | 878 | 675 | 203 | 30% |
| Louisville | 476 | 375 | 101 | 27% |
| London | 428 | 359 | 69 | 19% |
| Minneapolis | 269 | 253 | 16 | 6% |
| St. Augustine | 1,099 | 1087 | 12 | 1% |
| Tampa | 2,438 | 2428 | 10 | 0% |

In addition to Jacksonville and Orlando, **Atlanta, Miami, New York and Charlotte continue to drive strong traffic to the site.**

**Dallas, a target market,** jumped to #6 in outside markets**, with two and a half times more visits than last year.**

**Boston also showed incredible growth,** driving nearly four times as many visitors in Q3 than the previous year**, as did Miami,** with 3,400 additional visitors coming to the site versus FY 2017.

# Hotel Searches & Bookings

Four digital partners were connected to the Adara platform in Q3 (MNI, Adara Banner, iExplore, NCC Addressable). This platform allows us to measure the **true travel impact of select digital media placements.**

Of the six million impressions with Adara pixels served in Q3, **129,341 prospects exposed to our media performed a hotel search for Jacksonville, resulting in 6,307 room nights booked at close to $1 million in revenue.**

*Hotel Impact of Adara-Tagged Media*

| HOTEL SEARCHES AND | BOOKINGS |
|---|---|
| Total Searches | 129,355 |
| Total Bookings | 2,944 |
| Avg. No. of Travelers | 1.6 |
| Avg. Length of Stay | 2.1 |
| Total Nights | 6,307.0 |
| Total Revenue | $ 969,491 |

*Hotel Bookings by City*

# Flight Searches & Bookings

In terms of flight, **79,560 prospects exposed to our media performed a flight search for Jacksonville, resulting in 2,884 flight bookings.**

Booked travel was classified by Adara as approximately **55% business and 45% leisure**.

**Four of the top six cities for flight bookings** - Washington DC, New York, Chicago and Dallas – **were targeted by media in Q2 or Q3.**

*Flight Impact of Adara-Tagged Media*

| FLIGHT SEARCHES AND | BOOKINGS |
|---|---|
| Total Searches | 79,560 |
| Total Bookings | 2,884 |

*Flight Bookings by City*

# Hotels

In Q3, Jacksonville experienced the best April, May, and June in city history, continuing a trend that has seen RevPAR grow for 56 consecutive months. Occupancy, ADR, and RevPAR for Q3 grew 4%, +7%, and +12%, respectively. **Downtown hotel growth in particular was incredible, posting a 15% increase in occupancy and an 18% increase in RevPAR YoY.**

| Hotel Occupancy (Duval County) | | | |
|---|---|---|---|
| Month | Q3 2017 | Q3 2018 | YoY |
| April | 76.0% | 80.3% | 5.6% |
| May | 73.8% | 76.1% | 3.1% |
| June | 71.9% | 74.6% | 3.7% |
| Total | 73.9% | 77.0% | 4.2% |

| Market | Q3 2017 | Q3 2018 | YoY |
|---|---|---|---|
| Arlington+ | 76.5% | 79.8% | 4.4% |
| Beaches+ | 82.2% | 80.8% | -1.7% |
| Downtown+ | 66.6% | 76.4% | 14.7% |
| Northside/Airport+ | 73.4% | 75.9% | 3.4% |
| Southside/Mandarin+ | 74.7% | 77.1% | 3.2% |
| Westside+ | 78.5% | 78.7% | 0.2% |

| Average Daily Rate (Duval County) | | | |
|---|---|---|---|
| Month | Q3 2017 | Q3 2018 | YoY |
| April | $94.08 | $102.27 | 8.7% |
| May | $97.51 | $103.46 | 6.1% |
| June | $89.94 | $94.98 | 5.6% |
| Total | $93.85 | $100.24 | 6.8% |

| Market | Q3 2017 | Q3 2018 | YoY |
|---|---|---|---|
| Arlington+ | $82.08 | $88.32 | 7.6% |
| Beaches+ | $162.50 | $168.63 | 3.8% |
| Downtown+ | $124.07 | $127.44 | 2.7% |
| Northside/Airport+ | $83.79 | $88.30 | 5.4% |
| Southside/Mandarin+ | $85.39 | $93.23 | 9.2% |
| Westside+ | $73.47 | $79.69 | 8.5% |

| RevPAR Daily Rate (Duval County) | | | |
|---|---|---|---|
| Month | Q3 2017 | Q3 2018 | YoY |
| April | $71.57 | $82.16 | 14.8% |
| May | $71.92 | $78.75 | 3.5% |
| June | $64.71 | $70.86 | 9.5% |
| Total | $69.40 | $77.26 | 11.3% |

| Market | Q3 2017 | Q3 2018 | YoY |
|---|---|---|---|
| Arlington+ | $62.74 | $70.60 | 12.5% |
| Beaches+ | $133.47 | $136.36 | 2.2% |
| Downtown+ | $82.74 | $97.50 | 17.9% |
| Northside/Airport+ | $61.49 | $67.00 | 9.0% |
| Southside/Mandarin+ | $63.85 | $71.97 | 12.7% |
| Westside+ | $57.76 | $62.74 | 8.6% |



OCCUPANCY RATE — Q3 2017, Q3 2018 (+4.2%)

AVERAGE DAILY RATE — Q3 2017, Q3 2018 (+6.8%)

REVENUE PER AVAILABLE ROOM — Q3 2017, Q3 2018 (+11.3%)

# FY2019 STRATEGIC APPROACH

# FY2019 STRATEGIC APPROACH

Continue with a multiplatform approach, but allocate majority of **spend in digital channels** based on its proven ability to drive strong increases in traffic to the site

Place greater emphasis on channels driving strong site traffic: **native, paid social, paid search**

Increase spend against targeting tactics that are driving bookings, such as **travel intent data targeting and IP address targeting**

Consider opportunities and partners that include more **video and high impact units to build awareness levels**

**Continue local market effort in Atlanta to** sustain momentum; re-introduce Charlotte to capitalize on potential

**Increase YOY spend in spot cable** to take advantage of its positive impact on site traffic

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# FY2019 MEDIA TACTICS

# MEDIA PARTNER SUMMARY

| CHANNEL | NOT RETURNING | RETURNING | NEW |
|---------|---------------|-----------|-----|
| DIGITAL | Pinterest, ESPN, lonely planet | MNI Your Audience. Delivered., Condé Nast Traveler, iExplore, PULSEPOINT, ADARA, NCC digital·media, Facebook, madden media connecting people to places | Undertone, tripadvisor |
| PRINT | FLORIDA SPORT FISHING | | |
| RADIO | | PANDORA | |
| CABLE | | TBD based on negotiations | |
| OOH | | TBD based on negotiations | |
| IN-FLIGHT | | allegiant, American Airlines, SOUTHWEST, DELTA | |

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# AUDIENCE-TARGETED DISPLAY + VIDEO

Active Outdoor

HISTORY CULTURE ARTS

SPORTS

CULINARY

Reaches our target segments of active/outdoor, art/culture/history + culinary through third-party data collection that identifies audiences by demographics and interests

Serves ads to those qualified users programmatically across thousands of sites



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# NATIVE

HISTORY CULTURE ARTS

SPORTS

CULINARY
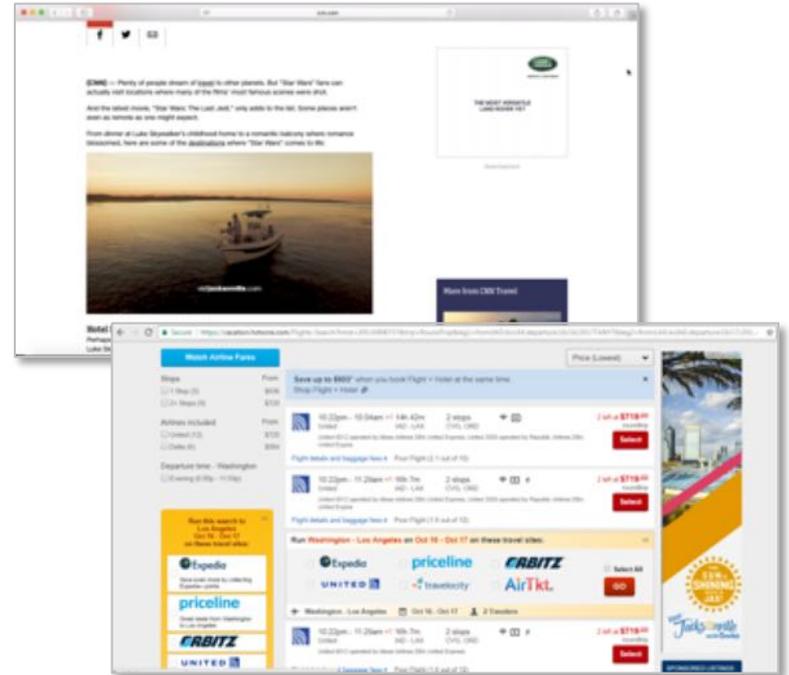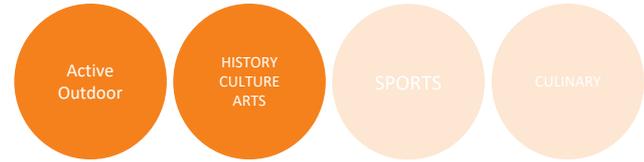
Delivers engaging, high impact content to the right audience through ad units that take on the look and feel of each individual publisher's site

Based on strong past performance, increase presence in FY2019



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# HIGH IMPACT

Drives awareness and encourages brand consideration via custom attention high impact formats across a network of premium sites

Flighted during key time periods to encourage visitation during slower seasons



Undertone

# TRAVEL DATA TARGETING

Active Outdoor

HISTORY CULTURE ARTS

SPORTS

CULINARY

Utilizes first party travel path-to-purchase data from airlines, hotels, and other travel/transportation companies to reach those who are actively shopping/booking in real time

Layers on additional targeting requirements to reach our key segments and geographies

Based on strong performance YTD, recommend increasing presence in FY2019

2+ people on itinerary

Flew to Orlando, FL, last year

Searching for FLORIDA destinations

Prefer economy hotel brands

Use smartphones and tablets

Staying 6 nights, rented a mini-van, frequent flyer #1234

ACTIVE ADULTS

30+ data points per profile

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# ADDRESSABLE DIGITAL
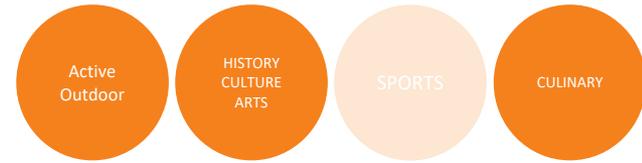
Targeting that matches the cable modem IP address to a subscriber's billing address, identifying the home's profile using databases like the US Census, Polk data, etc.

Continue with in-banner and in-stream video units

Increase spend based on strong ability to drive hotel and flight bookings

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# CONDE NAST TRAVELER

Active Outdoor

HISTORY CULTURE ARTS

SPORTS

CULINARY

Continue with targeted placements across Conde Nast Traveler based on strong ability to drive bookings

Introduce e-newsletter sponsorships to increase exposure



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# IEXPLORE



Continue with native content program

Introduce iExplore influencer promotion to socially distribute 3 sponsored articles

Sponsored Twitter chat with influencers discussing the activities and attractions Jacksonville has to offer

Continue with high impact units based on proven ability to drive strong site traffic

Active Outdoor

HISTORY CULTURE ARTS

SPORTS

CULINARY

LET'S CREATE
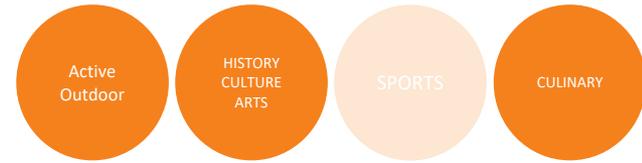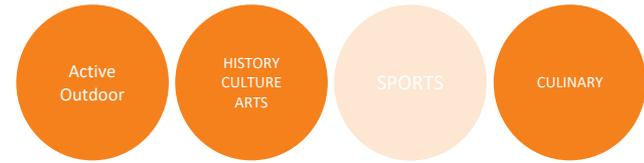
# TRIP ADVISOR

Test as a new partner to reach users mid-funnel when they are actively searching for content around Jacksonville or Florida on tripadvisor.com

Also target users who are looking for information relating to the outdoors, history, culture, arts, and food

Utilize Trip Advisor's first party travel data to reach users with video content on other sites

Active Outdoor

HISTORY CULTURE ARTS

SPORTS

CULINARY

# TARGETED E-BLASTS

Targeted custom prospecting emails to a curated list of sports enthusiasts to drive traffic to Jags games

Markets: Indianapolis and Houston
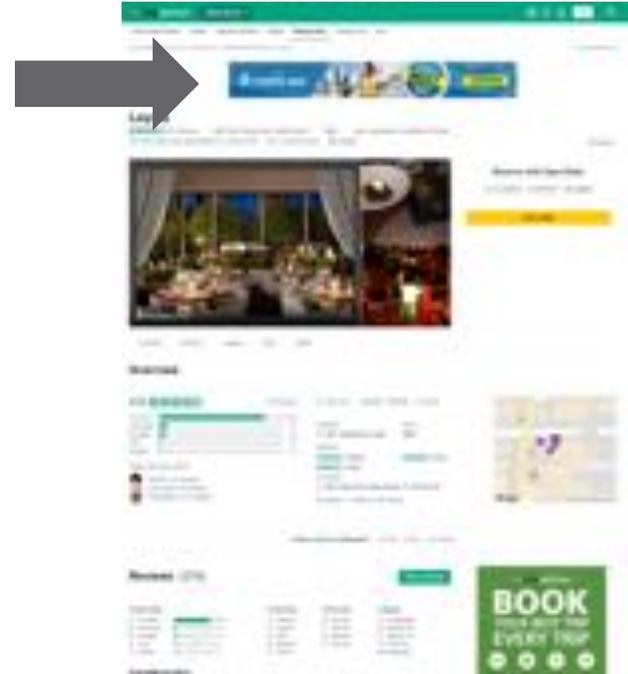
# PAID SOCIAL



Puts our message in an engaging environment that has massive scale and advanced targeting options

Runs in-feed, both display and video

Recommend increasing presence based on strong performance

# PAID SEARCH

Reaches the lowest hanging fruit – those qualified hand raisers who are actively looking for information about Jacksonville

Based on strong performance, increase search spend YOY

# INFLUENCER MARKETING

Leverages travel + lifestyle influencers to create and share content that features their experiences in Jacksonville relating to active/outdoor, history/culture/arts and culinary

Continue to support boosted social posts via paid media budget; actual program to be funded separately



Active Outdoor

HISTORY CULTURE ARTS

SPORTS

CULINARY

# DIGITAL RADIO
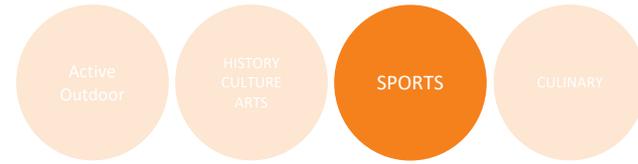
Continue to utilize Pandora to drive traffic to Jags' away games

## SHARE OF EAR



Pandora Free
35%

Pandora Paid
6%

Spotify Premium
17%

Spotify Free
14%

Other Streaming
Audio Brands
28%

LET'S CREATE
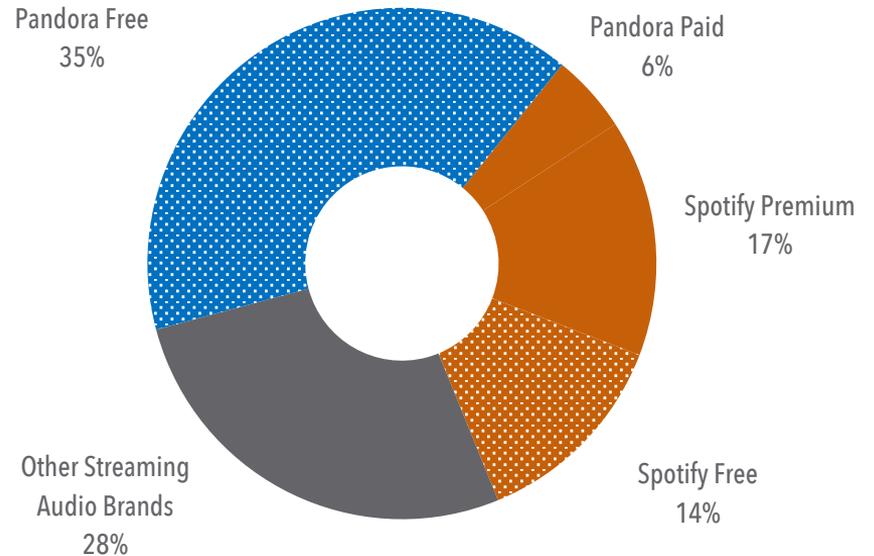
# GARDEN & GUN



Continue with a cross platform approach including print and digital

½ page ad + ½ page advertorial in FL section
1/3 page unit
Talk of the South e-blast sponsorships
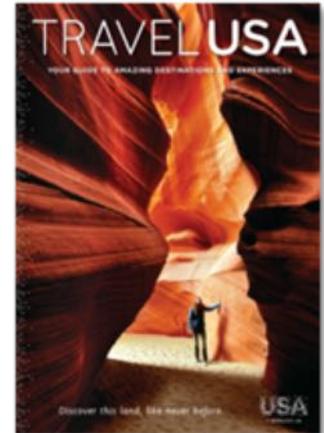Homepage takeover
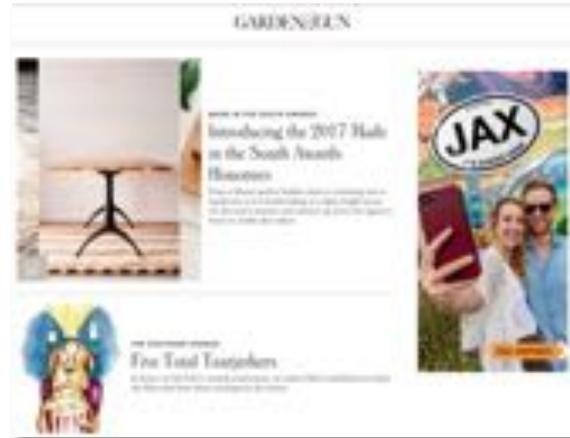
# ADDITIONAL PRINT

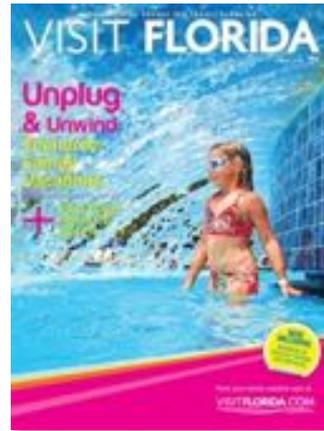Official Visit Florida Guide targets potential visitors who request the guide to plan their Florida trio, the 5 Official Florida Welcome Centers as well as AAA offices

Travel USA Inspiration Guide is designed to create awareness of travel in the US, reaching 21 countries in 13 language specific editions

# IN-FLIGHT PROMOTION

Continue presence with airlines that support direct flights to Jacksonville



Front cover package



"The City You Are Missing" feature



In-flight video



1x half page

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# OUT OF HOME



Utilize digital billboards in Atlanta and Charlotte local market campaigns to provide additional exposure

Supported with mobile geofencing around the boards for increased frequency

Active Outdoor

HISTORY CULTURE ARTS

SPORTS

CULINARY

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# OUT OF HOME

Active Outdoor

HISTORY CULTURE ARTS

SPORTS

CULINARY

Continue with key placements in Chicago and NYC





*BARCLAY'S CENTER, NYC*

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# LOCAL CABLE

Based on the lift in site traffic during the local cable window in FY2018, recommend continuing with this effort in FY2019 in Atlanta and Charlotte
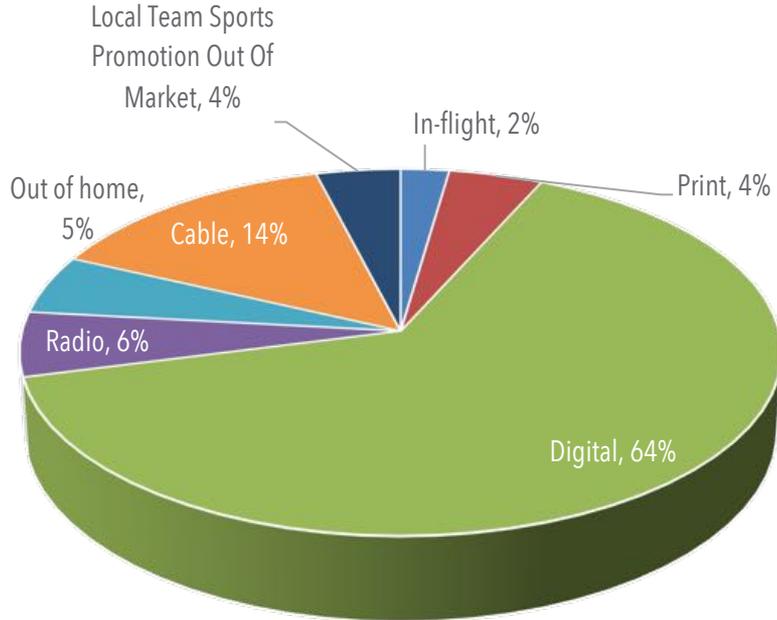
Active Outdoor

HISTORY CULTURE ARTS

SPORTS

CULINARY

LET'S CREATE

# INVESTMENT SUMMARY

# YOY BUDGET PROJECTION BY CHANNEL

| CHANNEL | FY2018 PURCHASED | FY2019 PLANNED | YOY +/-% |
|---------|------------------|----------------|----------|
| IN-FLIGHT PROMOTION | $ 29,295 | $ 36,795 | 26% |
| PRINT | $ 59,187 | $ 52,644 | -11% |
| DIGITAL | $ 818,870 | $ 815,561 | 0% |
| RADIO | $ 72,500 | $ 30,000 | -59% |
| OUTDOOR | $ 66,030 | $ 40,000 | -39% |
| CABLE | $ 179,965 | $ 250,000 | 39% |
| CONTINGENCY / LOCAL SPORTS TEAM PROMOTION | $ 49,357 | $ 50,000 | 0% |
| GRAND TOTAL | $ 1,275,000 | $ 1,275,000 | 0% |

# YOY MEDIA MIX



**FY2018 MEDIA MIX**

- Local Team Sports Promotion Out Of Market, 4%
- In-flight, 2%
- Print, 4%
- Out of home, 5%
- Cable, 14%
- Radio, 6%
- Digital, 64%

**FY2019 MEDIA MIX**

- Contingency, 4%
- In-flight, 3%
- Print, 4%
- Out of home, 3%
- Cable, 20%
- Radio, 2%
- Digital, 64%

LET'S CREATE
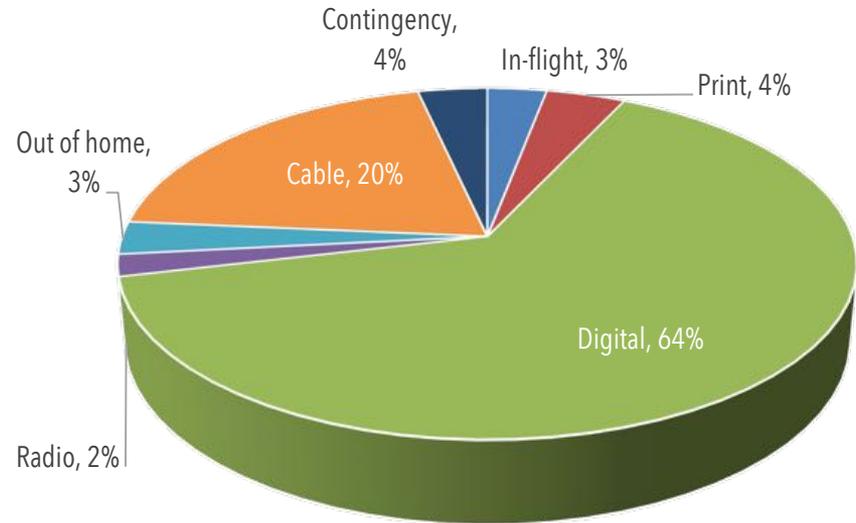
# YOY BUDGET PROJECTION* BY CAMPAIGN

| CAMPAIGN NAME | FY2018 | FY2019 |
|---|---|---|
| ALL CAMPAIGNS | 44% | 46% |
| ACTIVE/OUTDOOR | 19% | 21% |
| HISTORY/CULTURE/ARTS | 18% | 23% |
| SPORTS | 12% | 7% |
| CULINARY | 6% | 4% |
| GRAND TOTAL | 100% | 100% |

*Subject to change based on finalized media plan.

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# CAMPAIGN MEASUREMENT

# Current Media Performance Metrics

- Currently we are evaluating performance of the following metrics based on an aggregated view of the entire media plan:

- IMPRESSIONS

- CLICKS/ENGAGEMENTS

- VIDEO VIEWS

- EMAIL OPENS

- However, this method **does not allow us to measure each individual tactic based on it's primary key performance indicator**

# Proposed Change for FY2019

Group similar tactics and set performance goals based on the <u>primary KPI intended for each:</u>

| TACTIC | IMPRESSIONS | CLICKS/ENGAGMENTS/ARTICLE VIEWS | VIDEO VIEWS | EMAIL OPENS |
|---|---|---|---|---|
| Programmatic/Site Direct - DISPLAY | 32,000,000* | | | |
| Paid Social - DISPLAY | | 30,577* | | |
| Programmatic/Site Direct/Paid Social - VIDEO | | | 1,811,288* | |
| Programmatic/Site Direct - NATIVE | | 226,541* | | |
| PAID SEARCH | | 13,750* | | |
| EMAIL | | | | 11,200* |
| STREAMING RADIO | 4,019,608* | | | |
| CABLE | 5,957,000* | | | |
| PRINT/IN-FLIGHT | 9,496,529* | | | |
| OUT OF HOME | 5,654,868* | | | |

*Please note that these projections for FY2018-2019 are not final and are subject to change, as the full year of FY2017-2018 data for comparison is not available at this point in time. Final goals and projections will be presented in the November meeting once FY2017-2018 closes and the full year of data is available.

# FY2018 Website Success Metrics

A ten percent (10%) annual increase in **website traffic to the City's official tourism website**.

An annual five percent (5%) increase in **leisure market visitors/tourists** as determined by the *Longwood Travel USA Jacksonville Visitor Report*.

An annual five percent (5%) increase in **total tourist development tax collections**.

MARKETING PLAN

+10% Site Traffic

+5% visitors

+5% BED Tax

# How is "Website Traffic" Currently Defined?

- Currently defined as **total visits to VisitJacksonville.com, inclusive of:**

  - **Paid media traffic:** Traffic to the site <u>specifically driven by paid advertising.</u>

  - **Organic traffic:** Inclusive of <u>all search engine traffic</u>. Heavily influenced by Google's search algorithms and Google's own growing travel results sections.

  - **Referral traffic:** Consists of <u>traffic driven from links on other websites</u> (coj.net; firstcoastnews.com; visitflorida.com; jaxmomsblog.com; etc.). Heavily dependent on traffic and placement from outside sites we do not control.

  - **Direct traffic:** Includes <u>visits coming from bookmarks, or where the URL is directly typed into the browser;</u> often the by-product of organic traffic, with up to 25% of direct visitors typically come from within Jacksonville, depending on season

  - Because KPI is inclusive of inclusive all channels, total visits **can be heavily skewed by factors beyond our control.**

# Proposed Website KPI Change for FY2019

Redefine "web traffic" as **site visits directly driven by paid media**

By excluding channels heavily dependent on factors beyond our control, we can **more accurately assess the true influence of our campaign year-over-year.**

A 5% target for FY 2019 will **bring website goals into closer alignment with other success metrics.**

MARKETING PLAN

10% Site Traffic
**+5%** SITE VISITS FROM PAID MEDIA

+5% visitors

Longwoods
INTERNATIONAL

+5% BED Tax

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