LEON COUNTY DIVISION OF TOURISM (VISIT TALLAHASSEE) 2017-18 MARKETING INSIGHTS

- Roles & Objectives
- The Environment
- Recent Performance
- Travel Trends
- Travel Planning By Generations
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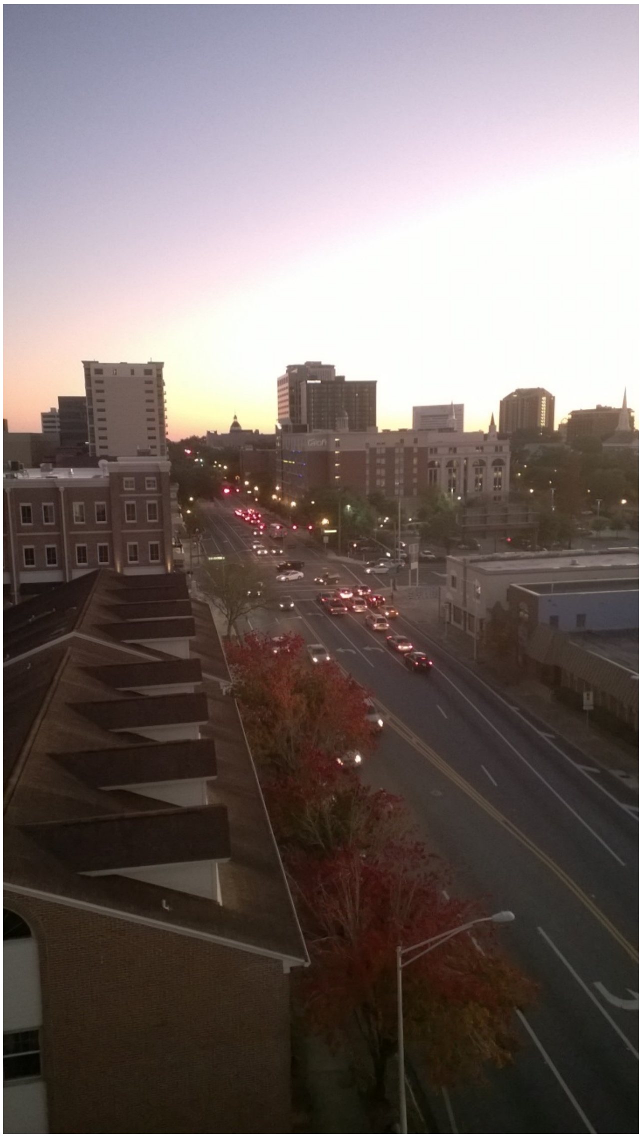
Mission & Vision

Mission Statement

To spearhead and coordinate the tourism related marketing and management of the Destination through the coordination of the hospitality industry, local governments and the business community to sustain and grow visitor spending and job creation in the Tallahassee Region.



Vision Statement

The Tallahassee Region will be an innovative and sustainable year-round destination that is recognized as a place to visit for historic, nature-based and cultural tourism as well as a hub for meetings, conferences, film and sports related activities as a means to enhance the Region’s economy and quality of life.

The Team

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Roles & Objectives

- Provide leadership for and related marketing activities that assure sustained growth and economic viability of the tourism industry in Leon County.
- Increase demand for paid lodging, especially during shoulder periods – both months and week-parts
- Continue investing resources in cost effective marketing activities and opportunities for area businesses
- Implement marketing programs that are attainable, measureable and specific.
- Define and illustrate the destination’s varied attributes, focusing on its unique, authentic qualities to specific audience segments.
- Broaden our marketing reach both within and beyond our defined, primary geographic marketing area – Florida, Alabama and Georgia.
- Communicate regularly through email newsletters with industry partners, consumers and decision makers/influencers.
- Increase traffic to VisitTallahassee.com, Trailahassee.com and CapitalCityAmphitheater.com and keep content refreshed, responsible and reliable.
- Maximize industry participation in all marketing initiatives.
- Increase media exposure and social media engagement for the destination and industry partners.
- Assist industry partners in developing programs and packages for specific market segments.

Insight: The Environment

Competitive Landscape:

- Beach vacations dominate the consumer mindset regarding vacation offerings in Florida's panhandle. Likewise, the state's (VISIT FLORIDA) overall marketing programs focus primarily on beaches and major Central Florida attractions.
- Florida panhandle beach destinations, while competing for essentially the same leisure travelers, offer high quality but mostly one dimensional "vacation experiences." Exceptions include Pensacola (history), Panama City Beach (sports and large-scale music concerts/festivals) and South Walton (higher end dining/lifestyle)
- Tallahassee/Leon County either dominates or maintains a competitive position with:
  - Eco-adventure and popular outdoor activities – high quality experiences which are readily accessible to a contemporary community offering travel amenities and comforts,
  - An emerging contemporary, hip atmosphere driven by businesses catering to a young population base
  - History, heritage, art and culture
  - Sports – both participatory and spectator

Opportunities:

- Leverage the high repeat and frequency rates (averaging more than four visits in the past year) among Tallahassee/Leon County visitors with programs that convert this audience to destination advocates
- The community's friendly, engaging reputation and natural beauty provide opportunities for selling a vacation lifestyle as much a destination
- Adopt a more contemporary posture and personality, focusing on unique restaurants, shops, galleries, nightlife, music and the community's "green" reputation in appealing to Generations X & Y.
- With "experiential travel" popular among all generations, emphasize active pursuits. Today's travelers gravitate more toward "doing things" rather than "looking at things."
- Emphasize authentic and natural qualities that offer a completely different Florida vacation experience.
- During much of the year, Tallahassee/Leon County offers an affordable vacation experience, especially those traveling with children.
- Capitalize on the success of hosting high profile sports events.

Insight: The Environment (Continued)

Obstacles:

- Limited air lift and volume means focusing on auto travelers but will not preclude seeking promotional activities where non-stop air service to Tallahassee International Airport exists.
- Limited meetings and conventions facilities require focusing entirely on "small meetings” as a niche and specialty.
- Neutral site college football games, while often lucrative ventures for universities, dilute the economic benefit to the local community.
- Significant capital investment by other communities reduces some of the competitive advantage Tallahassee/Leon County previously enjoyed in attracting sports events.
- Limited advertising funds put more emphasis on direct sales and “earned media” for any Tallahassee/Leon County exposure and success in new or emerging market segments.

Industry Challenges & Changes:

Like it or not, the sharing or “gig” economy arrived and it’s not going away anytime soon. It’s a concept and entry into the travel purchasing/supply funnel welcomed by Millennials. In fact, many in that age demographic prefer it.

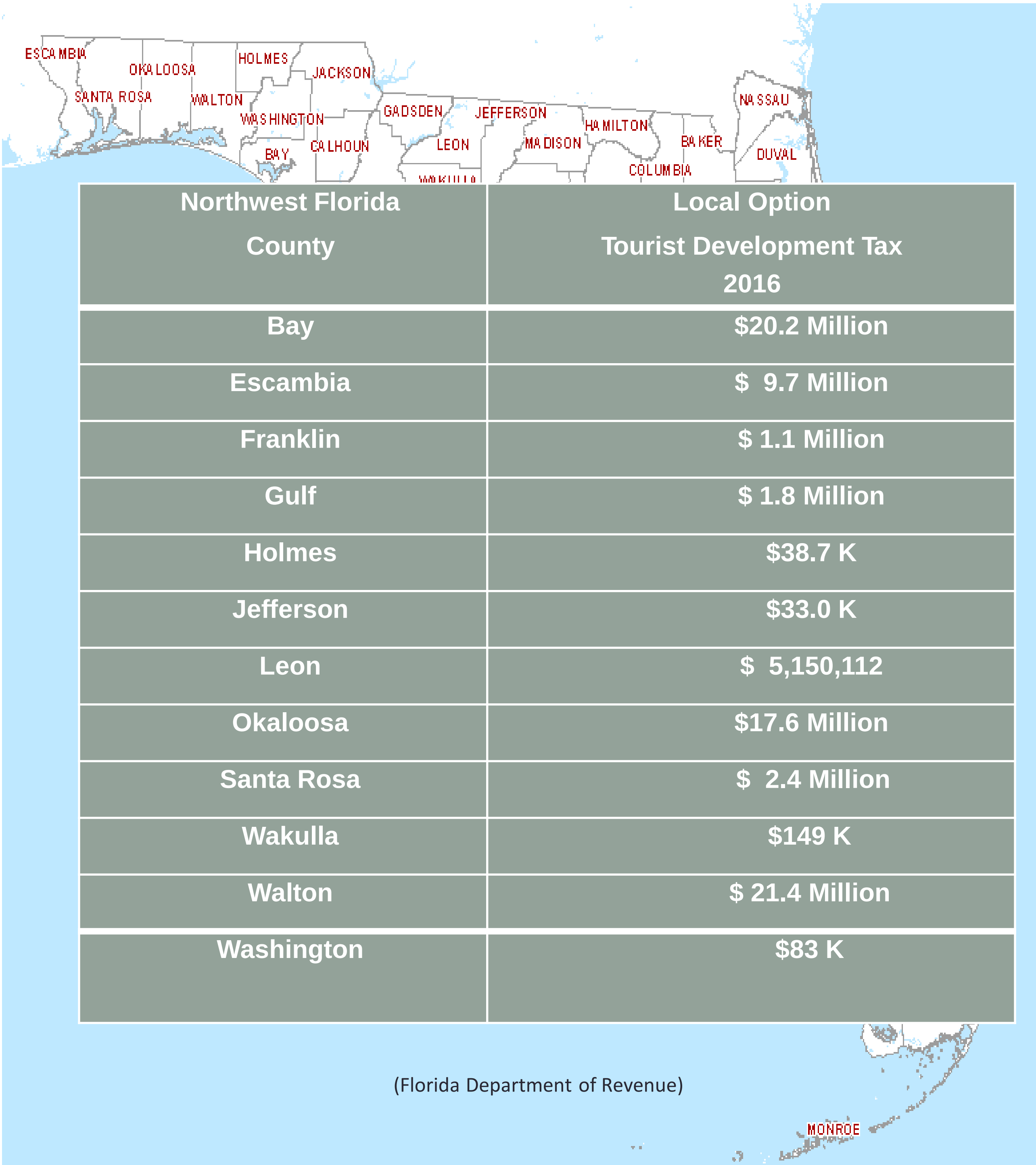
- **Uber** – Unlike many Florida communities, Uber entered the community more than a year ago with little negative reaction from other transportation companies.
- **Lyft** – Another ride sharing company much like Uber, it arrived in March 2017.
- **Air BnB** – While relatively new here, it already offers lodging rentals in 150 private homes or apartments with rates ranging from $45 to $1,000 per night for high-demand weekends during football season. The average price is $123 per night.
- **RentLikeAChampion.com** – A three-year-old web site offering rentals homes throughout the country for college football weekends and special events. The site offers more than 50 area properties for FSU home football games and commencement. Prices range from $500-$2,400 per weekend, depending on game.

Insight: The Potential Visitor

In April, 2015, the Division conducted a Potential Visitor Report through Downs-St. Germaine Research. The report summarized findings from 500 surveys of potential visitors in 14 major markets in and outside Florida. The findings include **(actions noted)**:

- Top of mind preference for Tallahassee as a Southeast vacation or Florida vacation destination is very low but aided recall is quite high among competitor destinations; **Since "beaches" define most travelers' opinions of Florida destinations, a key is differentiating our visitor options which, in some cases, places Tallahassee in an entirely different consideration set**
- 1 in 9 potential visitors already stayed in Tallahassee and most who have not, cite preferences for other cities or lack of things to do in Tallahassee; **Due to limited advertising funds, earned media plays a critical role in promoting area events and activities to specific audience segments.**
- Potential visitors think of Tallahassee for short weekend getaways; **This presents opportunities for impulse travel decisions popular with all generation segments, especially millennials. "Own the weekend."**
- Tallahassee is perceived as slightly less expensive than other destinations; **Another positive, especially among Generations X & Y which take more frequent, shorter trips that are closer to home.**
- 3 in 4 potential visitors would drive if visiting Tallahassee; **Another opportunity for impulse travel decisions.**
- Half of those who would fly, would fly into an airport other than Tallahassee; **Expanding air service will help, but mostly from cities with direct service.**
- Tallahassee is perceived as being similar to Gainesville and Tuscaloosa
- When selecting vacation destinations, potential visitors most value:
  - Value for their travel dollar
  - Scenic beauty
  - Pleasant places to unwind
  - Range/quality of accommodations
- Potential visitors rate Tallahassee low on these desired attributes; **Ironically, most of these are considered destination strengths by frequent visitors. Retelling that story is critical, especially with shared experiences in social media.**
- Potential visitors perceive visitors to Tallahassee as associated with one of the universities or with older people; **Both are understandable with the latter influenced by the state's reputation as a retiree haven among many outside of Florida.**

Insight: Regional Tourist Tax Collections



Northwest Florida County	Local Option Tourist Development Tax 2016
Bay	$20.2 Million
Escambia	$ 9.7 Million
Franklin	$ 1.1 Million
Gulf	$ 1.8 Million
Holmes	$38.7 K
Jefferson	$33.0 K
Leon	$ 5,150,112
Okaloosa	$17.6 Million
Santa Rosa	$ 2.4 Million
Wakulla	$149 K
Walton	$ 21.4 Million
Washington	$83 K

(Florida Department of Revenue)

Value for partners

Partner Focus: Targeted Sales

- Throughout the year, the Division provides destination visibility, information and conducts business appointments at trade and targeted consumer events. Trade show audiences include tour operators, meeting planners and sporting event organizers. The consumer events focus on specific audience segments that are aligned with destination assets, including arts, culinary, active outdoor interests, etc.
- The industry receives business leads generated from dozens of trade shows through IDSS, the Division's contact management system.
- The Division conducts site inspections and familiarization tours that provide personalized sales exposure to industry partners with tour operators, meeting planners and sporting event organizers.
- The Division also provides partners various cost effective (many free) opportunities for exposure and participation trade and consumer shows through its cooperative sales programs.
- The Division's email newsletters provide partners with both lead generation and booking opportunities.

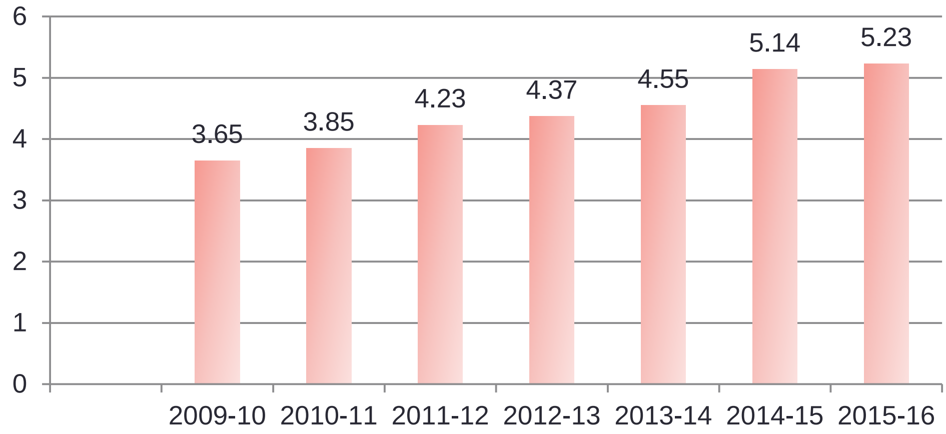
Partner Focus: Targeted Marketing

The Division provides industry partners with:

- Free listings on the Visit Tallahassee.com, including the events calendar;
- VisitTallahassee.com is the Division's primary call-to-action for all advertising and promotional programs. Site traffic increased 121% since 2010-11.
- The Visit Tallahassee Magazine (120,000 copies of the visitor guide) remains the primary promotional and fulfillment piece mailed to prospective vacationers. It is also used as a destination resource at trade and consumer shows, distributed at VISIT FLORIDA Welcome Centers, AAA Travel offices throughout Florida, area hotels, attractions and visitor information centers.
- Free promotional literature distribution through the Visitor Information Center
- Free public relations and social media support for special events, seasonal promotions and special industry offers
- Free listings for special closed market promotional offers to sports groups;
- Opportunities for media exposure and interaction with journalists representing travel and lifestyle media.

Recent Performance

Leon County Hotel Bed Tax Collections
(Shown in Millions)
43% Increase since 2009-10

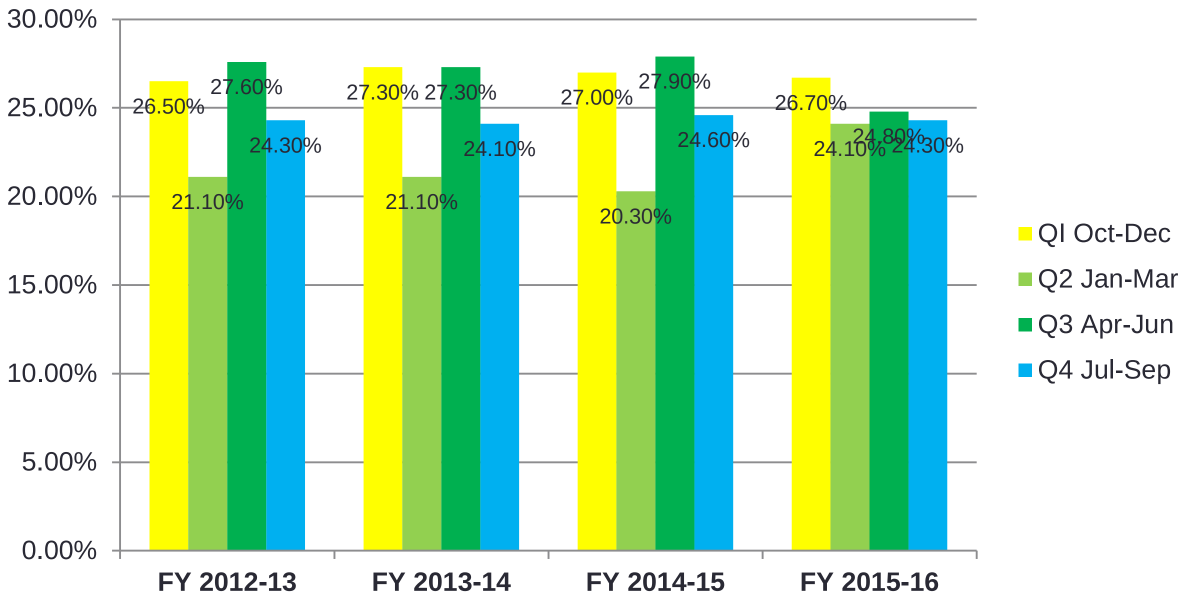


	2009	2010	2011	2012	2013	2014	2015	2016
Hotel Occ.	50.7%	53.3%	53.3%	55.0%	58.3%	60.4%	61.8%	62.8%
Avg. Daily Rate	$77.61	$75.73	$80.30	$80.82	$85.05	$90.00	$95.16	$96.23
Hotel Rev. (Millions)	$86.0	$87.29	$90.95	$95.68	$105.2	$112.8	$121.6	$124.0

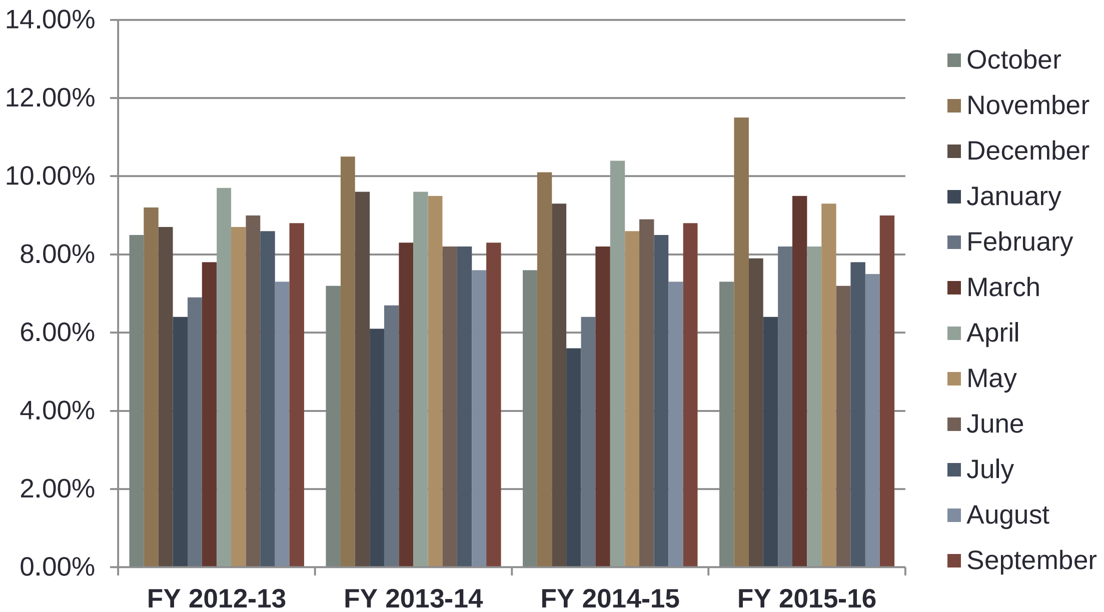
Seven years of unprecedented, record-breaking growth.

Bed Tax Balance

Bed Tax Balance: Percentage of Annual Collections By Quarter



Bed Tax Balance: Percentage of Annual Collections By Month



Seasonal Parity: More than football & the Legislature

While critically important to the area's economy, visitor traffic to the Leon County area, when viewed through hotel tax collections, show more parity and dispel the myth that the area is solely dependent on college football and the legislature.

Simple averaging the annual hotel tax collections would show 25% in each quarter, representing equitable disbursement of hotel visitors throughout the year. In viewing the last four years of data, the 2015-16 fiscal year came closest to this year with 26.7% of collection in the Q1, 24.1% in Q2, 26.9% in Q3 and 24.3% in Q4.

Over the past four years, the average percentage of annual hotel taxes collected by quarter are:

- Q1 (October – December) 26.87%
- Q2 (January – March) 21.65%
- Q3 (April – June) 26.90%
- Q4 (July – September) 24.45%

Since both the legislative session and the college football season each span two quarters, viewing hotel tax collections by month reinforces that the area now has more year-around appeal as a destination.

Over the past four years, the average percentage of annual hotel taxes collected by month show three distinct periods:

High

- November 10.32%
- April 9.47%
- May 9.02%
- December 8.87%

Medium

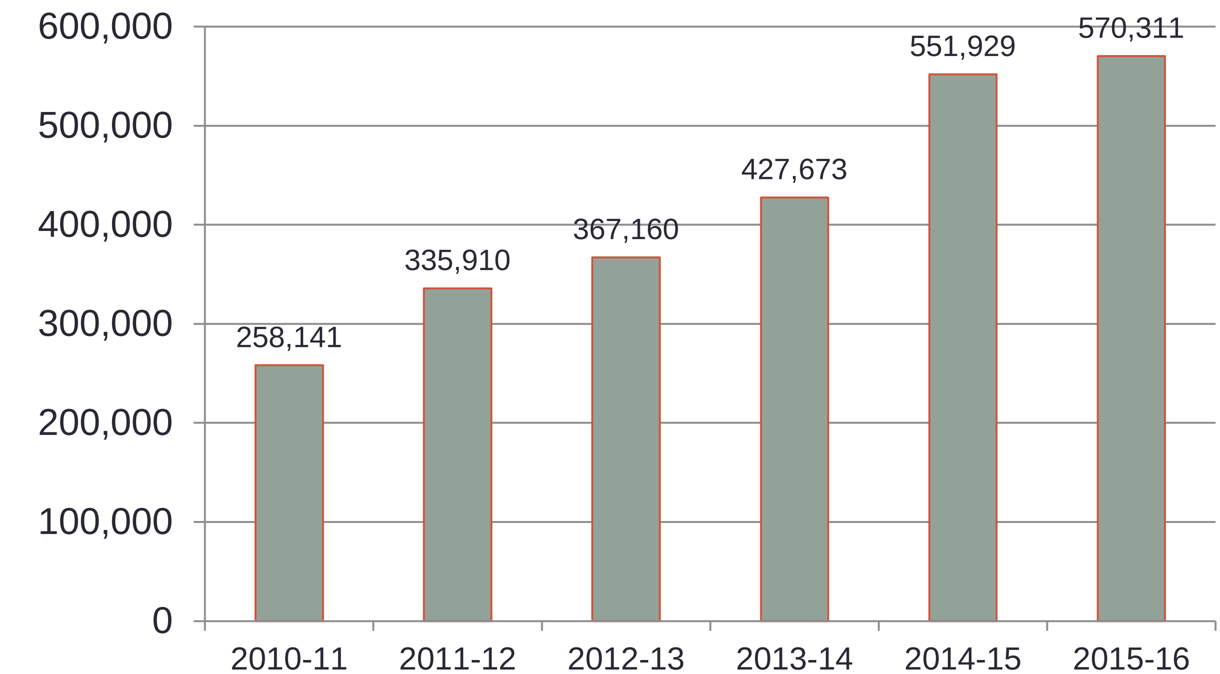
- September 8.72%
- March 8.45%
- June 8.32%
- July 8.27%

Low

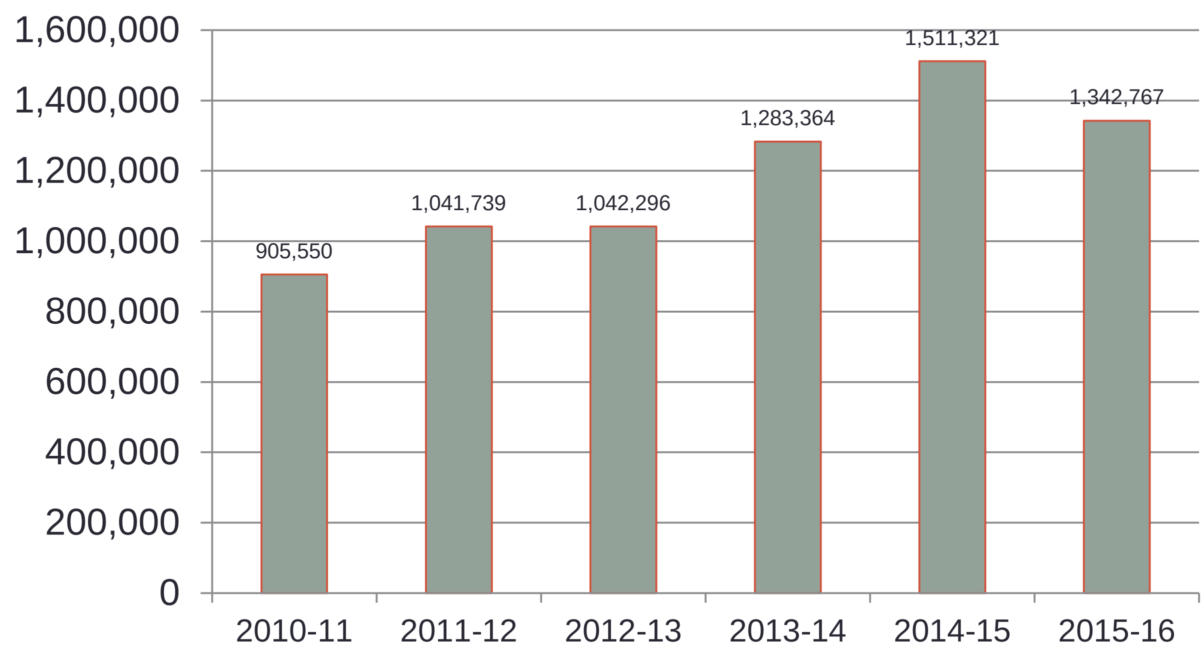
- January 6.12%
- February 7.05%
- August 7.42%
- October 7.65%

Online Performance

VisitTallahassee.com Visits



VisitTallahassee.com – Pageviews



Social Media

The Visit Tallahassee social media profile

Facebook:
- 50,680 “Likes” in 2015-16, an 11.5% increase from 2014-15 (45,424)
- Audience is primarily women (71%), age 35-54 (33%), 22% are women 55+

Twitter:
- 9.437 followers in 2015-16, a 27.3% increase from 2014-15 (7,411)

Instagram:
- 8,213 followers in 2015-16, a 103% increase from 2014-15 (4,030)

Pinterest:
- 311 followers in 2015-16, a 13.5% increase from 2014-15 (274)

Getting noticed gets harder as consumers drown in content. Here’s a look at the ridiculous amount of data facing consumers every minute:

- 4.2 million Facebook users like a post
- 2.4 million Instagram users like a post
- 300 hours of video are uploaded on YouTube
- 347,222 Tweets are sent
- 6.9 million videos are watched on SnapChat
- 86,805 hours of video are streamed on NetFlix
- 400 hours of video are shared
- 3.6 million text messages are sent

(The Word Pro Survey, July 2016)

Travel Trends

State of the American Traveler, 2016 Destination Analysts

- 4.4 average leisure trips 50+ miles from home with 30.5% being day trips
- 80% of these trips were by car
- 34.2% plan on traveling more in the next 12 months, 57.6% expect the same amount as last year
- 34.4% expect to spend more in the next 12 months, 54.8% expect to spend the same.
- 59.4% relied on user generated content when planning a trip, mostly reviews of hotels, destinations and restaurants; 36.4% used official destination web sites, most (67.6%) before deciding to visit the destination.
- Gas prices, cited as a reason for not travelling by 53.6% in July 2011, now only a concern by 16.9%

Trip Advisor Trip Barometer, 2015

- 64% used travel review web sites when planning a trip
- 45% use smartphone to book travel in advance of the trip
- 81% use smartphone for directions/maps while traveling
- 72% of travelers use smartphone for finding restaurants, 67% for seeking activities and 50% for finding accommodations

MDG Advertising & Chase Marriott Rewards, 2015 Studies

- 68% of travelers keep in touch with smartphones while traveling and 50% use them for taking photos and videos
- 97% of Millennials post on social networks while traveling, 73% at least once daily

Word of Mouth: By The Numbers

- More than 40% of Tallahassee-area visitors rely on suggestions from friends and relatives. (Downs-St. Germaine Research 2016)
- Nationally, 45.8% of travelers consider word of mouth “very important and 43.4% consider it “important” in travel planning. (Destination Analysts, 2016)
- How it happens: 90.4% personal conversation (face-to-face or phone call), 35.6% through social media, 29.4% through email, texts, post cards and letters. (Destination Analysts, 2016)

Mobile Phones Changed Everyday Life

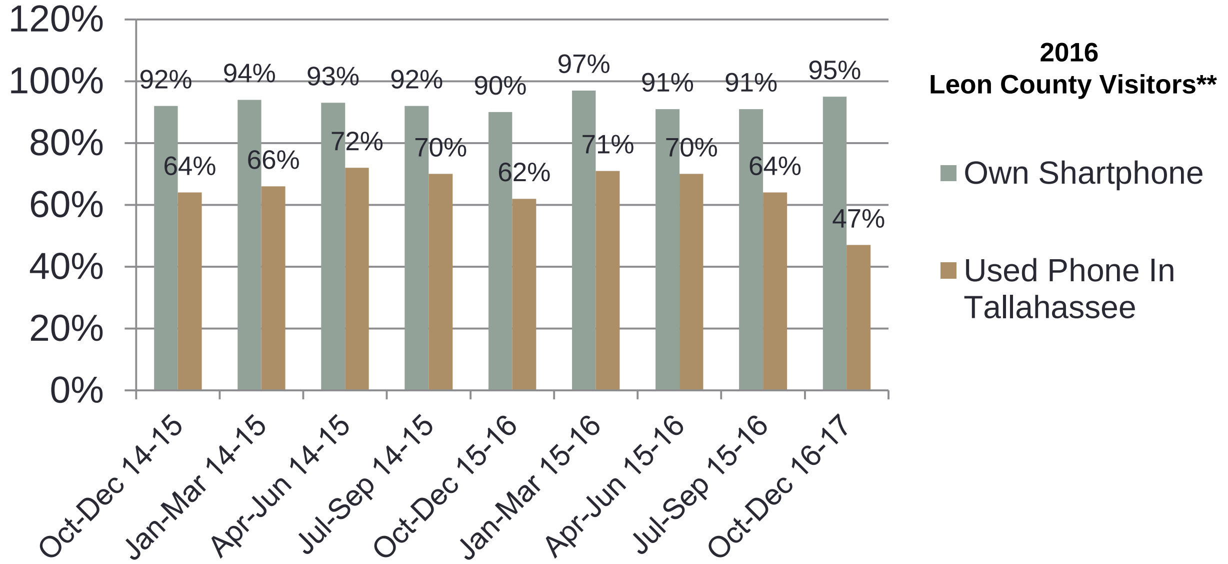
Radio Shack ad (1991) – 15 items worth $3,000 that now fit in your pocket or purse in a mobile phone.

Insight: The Mobile Force

In 2016, mobile phones replaced desk/lap top as the means of accessing VisitTallahassee.com. Mobile now accounts for more visits than desk/lap top and tablet combined. More than 90% of Leon County visitors own smartphones and two-thirds use them while in Tallahassee.

Nationally, using mobile phones in planning travel jumped from 17.2% in 2008 to 63.7% in 2016.* But mobile plays a bigger role in researching while desk/lap top remains the preferred method of purchasing travel.*

Technology Use: **Before Leaving Home** – Lap/Desk Top 65.2%, Mobile 15.5%, Print 9.7%, Tablet 9.6%. **While On Trip** – Mobile 36.6%, Lap/Desk Top 32.4%, Print 16.7%, Tablet 14.3%.*



Travelers use mobile devices differently while planning and while traveling.*

Pre-Travel: 31.8% access prices, 31.6% access maps, 31.2% access hotel information, 29.1% access destination photos, 26.5% access restaurants/dining

While traveling: 36.9% access maps, 30.6% access restaurants/dining, 23.0% access prices, 22.4% access activities/attractions, 20.4% access hotel information

**Downs-St.Germain Research: Leon County Visitor Tracking Reports
* Destination Analysts, Fall 2016

Insight: The Boomer Generation (1946-64)

Defining Events	Characteristics	Marketing Insights
• Viet Nam War • Woodstock • Earth Day • Assassinations • Walk on the moon • Music/fashion shift • Grew up with TV • Political & social change • Distrust/question government	• Think they invented social change • Independent • Question everything • Grew up with prosperity & status symbols • Adopted technology • Life-long learners • See bigger world, more travel options • Receptive to multi-generation trips • Control 70% disposable income • Spend more than Gen X & Y on technology • 17% are single, nearly 50% are parents or step parents	• Seeks easy button • Seeks personal service • Avoids hype, hyperbole kills credibility • Respect values, avoid ego-centered messages • Don't remind of age – senior discounts • Radio & network TV users • Prefer natural vs. conventional • Want new, meaningful experiences • Still respond to environmental messages • Read special interest magazines • Read newspapers • Active – hanging on to youth • Receptive to volunteer vacations • For many, retirement no longer a given • Account for 80% ($150 billion) of travel spending

Insight: Generation X (1965-81)

Defining Events	Characteristics	Marketing Insights
• Recessions • Latch key kids • Challenger disaster • Fall of Berlin Wall • AIDS • VCRs & video games • Computers in school & at home • World of uncertainty – drugs, divorce, economic strain • MTV	• Heterogeneous generation – race, class, religion, ethnicity & sexual orientation • Ignore leaders – work for long-term institutional control • Highly educated • Technology dependent • Active • Balanced • Happy • Family oriented • Work to live, not live to work • Postponed marriage & childbirth • Self-reliant, many grew up as latch key kids • Seek different, meaningful travel choices	• Straight forward, no hype, • Educate me, don't sell me anything • Cynical • Carefully evaluates purchases/choices with online research • Little brand loyalty • Gravitates more to word of mouth & social proof rather than trusting companies and their messages • Likes cable television • Read targeted magazines • Uses social media for information and connecting with personal network

Insight: Generation Y (1981-99) Millennials

Defining Events	Characteristics	Marketing Insights
• 9/11/2001 • Heavily influenced by MTV • Gulf Wars • Terrorists threats • Economic uncertainty	• Very technology savvy and highly mobile • 25% have blogs • Reject social conventions • Trophy kids – participation is reward enough • Live with parents longer, usually due to economic reasons • Closer to parents, include them among circle of “friends” • Delay rites of passage to adulthood • YOLO – you only live once • Heavily dependent on teamwork • Take shorter, more frequent trips closer to home • Follow information on interest & hobbies (61%), than traffic & weather (51%), information related to job/profession (44%) • 38% are freelancers, not constrained to 9-5 office routine • Rarely out of contact with core group • 67% live independently • Selfies	• Seek brands peers like • Likes green & humanitarian products & messages • Care more about what friends say/think than ad messages • Expect instant communications • Like word of mouth & referrals • Love contests, especially those with peers • Brand conscious • Influenced by creative graphics • Cable TV, but YouTube more important • Internet a necessity • Warm to direct mail • Expects something new from brands, not taglines • Brands should fit “my mold” • Care about the world & brands’ role in it • Respect me but entertain me • Surpassed Gen X as largest share of workforce • 52% use Instagram, 48% use Twitter • Facebook most frequent source of news • 70% dump email not optimized for mobile

Insight: Travel Planning By Generation

	Baby Boomers 1946-1964	Generation X 1965-1980	Millennials 1981-99
Used a mobile phone	32.8%	61.27%	83.5%
Used DMO visitor guide	19.3%	19.0%	17.2%
Read travel/lifestyle magazine	18.2%	21.3%	25.6%
Used a DMO web site	30.0%	34.5%	36.7%
Used newspaper travel section for planning	13.9%	12.8%	13.5%
Accessed Twitter for travel information	2.3%	9.8%	20.7%
Used Facebook for travel planning	14.5%	35.8%	46.5%

* State of the American Traveler, July 2016

Insight: Travel Influencers

Something new:

- Only 31% of travelers book a trip based on past experiences (Skift Megatrends Defining Travel 2016)
- 6 of 10 Millennials would rather spend money on experiences than material things (MMGY Global)

Manage your online reputation:

- Leisure travelers read 6-7 reviews before booking (Tnooz 2015)
- 80% of Trip Advisor users reference reviews before deciding on visiting an attraction (Trip Advisor 2015)

Social:

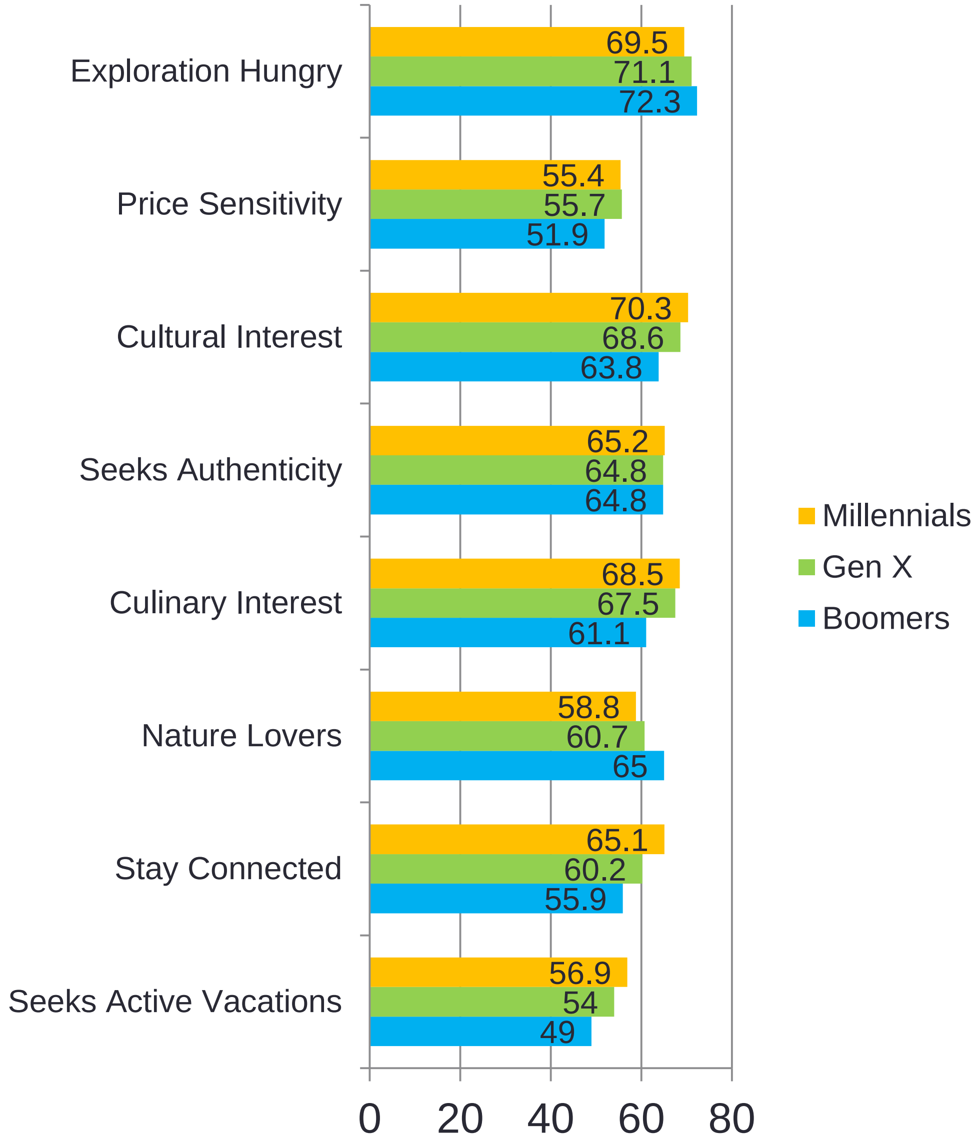
- Social messaging will account for 2.5 billion global users by 2018 (Skift Megatrends Defining Travel 2016),
- 97% of Millennials say they share pictures while traveling, especially on Facebook, Instagram, Whatsapp and SnapChat (F. Gonzalo 2016),
- 5 of 6 Millennials will choose to connect with companies on social media but want something in return – perks or discounts;
- The number of Generation Zs on Facebook is steadily declining while Instagram adoption climbs.

Communicating:

- 8 seconds, that's the average time Generation Zs take to process information, consider its worth and then move on to something else that catches their eye (Skift Megatrends Defining Travel, 2016)
- Generation Zs watch two times as many videos on mobile as other generations and 70% watch at least two hours of YouTube per day (Upfront Analytics 2015)
- Color visuals increase people's willingness to read content by 80% and increases readers' attention span and recall by 82% (Xerox)
- YouTube reaches more18-49 year olds than any cable television network in the US and more than half of all YouTube views come from mobile devices (You Tube 2015)
- Sunday newspaper readership is drying up. In 1999, more than 50% of all age segments read the Sunday newspaper. Now, only 55% of those 65+ read the Sunday newspaper – down from 76% in 1999. Less than a third of those 18-44 read it now. (Pew Research 2015)
- Magazine newsstand sales declined 14% in 2016 with celebrity, women's and home and garden titles performing the worst. Overall, print circulation has declined slightly while digital traffic increases dramatically. (Pew Research 2016)
- Americans trust in the mass media is at an all-time low and dropping – from 53% in 1997 to 32% in 2016 (Gallop Poll)
- 62% of adults get their news through social media (Pew Research)
- In some respects, the masses act smaller – Meetup.com reports 39.6 million sign ups and climbing (Priceconomics 2016) and Etsy defies retail struggles with sales climbing from $175K to $2.4 billion in the last seven years (Harvard Business Review)

Insight: Different Travel Styles & Interests

Overall, target generations – Boomers, Gen X and Millennials – demonstrate little difference in travel styles. Millennials and Gen X have more interest in cultural and culinary events while Boomers have greater interest in exploration and nature.



State of the American Traveler, July 2016

The Focus

Fall:

- Historic need period -- October
- Address Monday – Thursday bookings
- Maximize economic impact from weekend, college football visitors
- Promotional emphasis for events and activities on weekends when both FSU and FAMU play games away from Tallahassee

Winter:

- Historic need period – January, February
- January – February legislative session addresses Monday – Thursday bookings while weekends need attention
- Expand promotion for Market Days and Winter Festival weekend and build higher shopping/events awareness within the immediate region
- Expand college basketball promotion through PR and social media
- Build awareness with active leisure and group travelers (Generations X & Y) through promotion of Tallahassee Marathon, Urban Gorilla and other outdoor activities which influence spring and summer travel

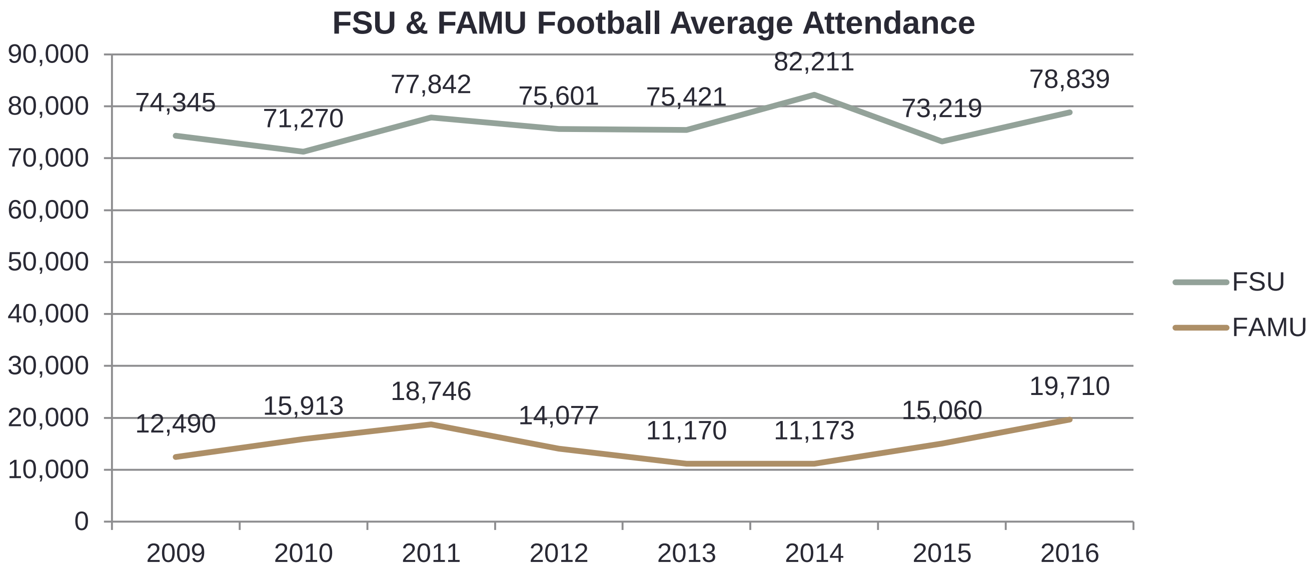
Spring:

- Historic Need Period – March
- Address void created in March and April due to shift in legislative season -- meetings, conferences, educational groups
- Weekend focus – couples and families – for Spring On Stage events, 100 days of color and celebrations
- Continued emphasis of outdoor activities (Trailahassee) focusing on Generations X&Y

Summer:

- Historic need period – June, July, August
- Focus on affordability for family travel, primary audience couples with children and secondary emphasis on Boomers traveling with grandchildren
- Leverage dances festivals and music events like Swamp Stomp
- Shift outdoor emphasis to paddling and exploration (bike trips to St, Marks, the “old Florida lure” of Wakulla Springs)
- Shift messaging to the “cool” side of Tallahassee for Generation X & Y

Fall:



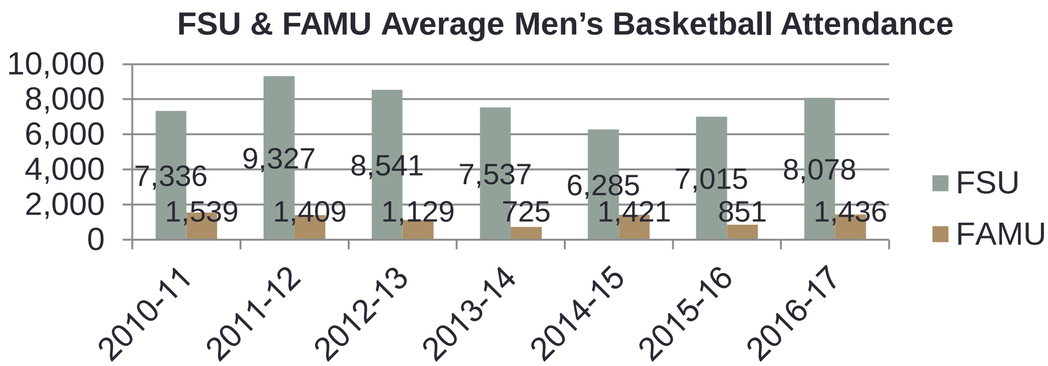
FSU – Seven home games in all seasons except six in 2009 & 2016 (Home capacity at 79,560)
FAMU – Four home games in 2009-2012 & 2016, five in 2013, 2014 (Home capacity at 25,500)
Attendance from NCAA Reports

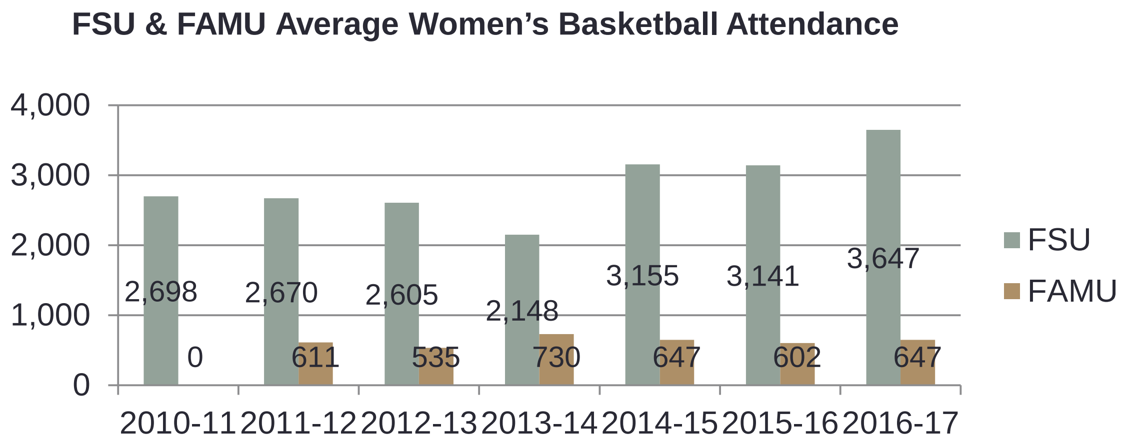
Football remains the focal point during the fall, generating high to maximum hotel occupancy on most weekends and increasing the need for attracting other events or activities on those weekend when both FSU and FAMU play away from Tallahassee.

- Limited opportunity for growth, especially with FSU averaging near maximum capacity for home games.
- The financial attractiveness of neutral site games for universities dramatically diminish the local economic impact. FSU and FAMU routinely schedule neutral site games.
- The Division successfully complimented fall business by attracting major cross country running events for weekends when both FSU and FAMU play away from Tallahassee.
- Focus on maximizing economic impact from football fans.
- Promotional focus during weekends when FSU and FAMU both play away from Tallahassee include any “replacement” events (cross country) , festivals and outdoor activities.
- Football marketing activities launch during the spring when FSU & FAMU finalize upcoming schedules and emphasize ticket sales/renewals.

Winter:

- The Market Days and Winter Nights & Holiday Lights weekend offers potential for continued overnight visitor growth and the extended regional appeal and the area's advantage for attracting holiday shoppers from nearby smaller communities
- College basketball offers an opportunity for growth in winter and early spring, especially focusing on weekend stays in conjunction with key games.





FSU – Games at Tucker Center (12,100)
FAMU – Games at Lawson Center (9,639)
Attendance from NCAA Reports

Spring:

- Florida historically leverages its “weather advantage” to visitors in northern states during the winter
- Tallahassee has its own “bragging season,” with distinct advantages to individual and group leisure travelers during the spring:
  - The spring “festival and color season” is certainly unique for Florida, with especially strong appeal among central and south Florida residents;
  - Engage the local industry and area residents in joining “bragging season” by emphasizing the area’s distinct visual appeal and spring color in social media posts.
- The abundance of popular special events and outdoor activities provide opportunities for building weekend stays
- The shift in the legislative session to January-February 2018 creates both opportunities (meetings, conferences, educational group tours, etc.) and challenges

Summer:

- Redefine a Florida summer vacation for Florida residents and out-of-state vacationers en route to other Florida destinations, focusing on outdoor activities, exploring historic sites, unique dining and the area's affordability
  - Aggressively pursue story placements in major DMAs 400+ miles north and west of Tallahassee (primarily I-10, I-20, I-40, I-65 corridors) for influencing Central Florida-bound vacationers
- Focus on the destination's affordability to young couples (Gen X and Millennials) traveling with children and Boomers traveling with grandchildren
  - Emphasize weekend stays
  - Pursue story placements in targeted media – bloggers reaching Gen X and Millennial couples, newspapers (print/online) for Boomers in addition to travel media
- Build destination exposure by showcasing team sports
- Showcase major entertainment events -- the African American Dance Festival and Latin Dance Festival in June and Swamp Stomp at Tallahassee Museum in July

Insight: The Sports Traveler*

- Sports Travel Magazine estimates travel for organized sporting events/activities exceeds $182 billion annually and accounts for more than 47 million room nights

- Running or jogging dominates individual sports activities with more than 51.5 million participating (18% of the population). It remains the most popular outdoor activity for all Americans, regardless of ethnic or racial affiliation
- Bicycling attracts 43.1 million participants (15% of the population)
- Hiking attracts 37.2 million participants (13% of the population)
- Kayaking attracts 1.8 million (1.6% of the population)
- Walking for fitness is the most popular crossover activity with 109.8 million participants, 37.3% of the population

- The most popular team sports activities include:
  - Basketball, 23.4 million participants (8.0% of the population)
  - Baseball, 13.7 million participants (4.7% of the population)
  - Soccer (Outdoor), 12.6 million participants (4.3% of the population)
  - Slow pitch Softball, 7.1 million participants (2.4% of the population)
  - Touch Football, 6.5 million participants (2.2% of the population)
  - Court Volleyball, 6.4 million participants (2.2% of the population)
  - Flag Football, 5.8 million participants (2.0% of the population)
  - Sand/Beach Volleyball, 4.8 million participants (1.6% of the population)

- Nearly half (49.2%) of Americans participated in some form of outdoor recreation last year. The actual number of outdoor participants increased but participation rate fell due to population growth.

- Outdoor participation is highest among Caucasians and lowest among African Americans.

- Hispanics make up a small percentage of total outdoor participants, but those who participated averaged the most annual outdoor outings per person.

* 2016 Outdoor Foundation Report

Insight: The Outdoor Traveler

- Almost 20% of outdoor enthusiasts go on an outdoor excursion at least twice a week
- Adults with children in the household participated in outdoor recreation at a higher rate (60%) than adults without children. Parents with children ages 6-12 participated at a slightly higher rate that parents of other aged kids, however, parents of teens 13-17 got outside the most often with 83 annual outings.
- The South Atlantic Region (which includes Florida) has a 46% participation rate and represents 19% of the US participants.
- The greatest participation rate (48.9 million) is in the 45+ year old category, followed by 25-44 year olds (46.3 million)
- People earning $100,000+ dominate outdoor enthusiasts (31%), followed by $25-49,999 (21%), and $50-74,999 (19%)
- Regional participation remains impressive with 51% of Floridians participating in outdoor recreation annually and generating $38.3 billion spending; 57% participation in Alabama generating $7.5 billion in spending; 53% participation in Georgia generating $23.3 billion in spending.
- Most popular adult outdoor activities (by participation rate) include: 14.9% running, jogging and trail running; 14.6% fishing; 12.5% hiking; 12.3% bicycling (road, mountain & BMX); 11.8% camping
- Favorite adult outdoor activities (by frequency of participation) include: 87.1 average outings per person for running, jogging and trail running; 54.2 average outings per person for bicycling; 20.1 average outings per person for fishing; 40.6 average outings per person for bird watching; 26.4 average outings per person for wildlife watching
- Top outdoor activities for growth over the past three years include: 28% stand-up paddling; 18% traditional road triathlon; 17% kayak fishing; 12% non-traditional/off road triathlon; 11% trail running; 10% white water kayaking; 10% adventure racing

* 2016 Outdoor Foundation Report

Insight: The Culinary Traveler*

- Culinary travelers average five trips per year, slightly more than general leisure travelers
- Unique food and drink experiences are prime motivators in choosing a destination for nearly three fourths of these travelers and 89% enjoy learning about local culture and cuisine of the destination they visit.
- More than 40% read a daily newspaper and 30% read community newspapers for food travel ideas. Deliberate culinary travelers (where food a key reason for travel) also read food, cooking and wine related magazines)
- More than half (55%) took at least one trip where food and drink were the key reasons for the trip
- A majority (85%) travel with at least one other person – 57% with a spouse or significant other and 20% with a friend.
- Those earning $75,000+ are more likely to travel with a spouse or significant other.
- On their most recent trip, culinary travelers averaged 4.3 days away from home
- Nearly 50% of travelers prefer using their own automobile when traveling and a majority (63%) stayed at a hotel, hotel or resort
- Organized events such as food and wine festivals and tours are key motivators for this segment. Festivals and tours are major motivators for Gen X & Y.
- Non-culinary activities are popular with the segment – 40% visit historic sites, 33% shop at boutiques. Matures also prefer scenic drives and shopping for items by local artisans more than Gen X & Y and Boomers who opt for nightlife and entertainment.
- These spend as much on food and dining as they do on shopping and entertainment.
- Rely heavily on recommendations of friends and family (56%), general web searches (56%), destination web sites (54%), online reviews (44%) and destinations brochures (22%) – all higher than general leisure travelers
- Preferences for unique food or drink (74%) far exceeds the preference for fine/gourmet dining (45%)
- As expected, this segment is more interested in wine tours/trails/winery visits (43%) or micro-brewery/pub tours (35%) than general leisure travelers.

* Mandala Research, 2013 Report

Insight: Culture & Heritage Traveler*

- Although broadly defined, nearly 80% of American leisure travelers annually participate in culture and heritage activities, accounting for more than $193 billion in travel-related expenditures

- These travelers represent all generations, education and income levels, however some segments skew older, more highly educated and wealthier

- This segment travels more frequently than the general leisure audience, averaging slightly more than five trips annually compared to 3.98

- Primary motivators include:
  - Experiences where the destination, its buildings and surrounding have retained historical character
  - Educational experiences – intellectual enrichment -- in their travel
  - Lodging that reflect local culture
  - Explore a different culture/history at a destination

- Outside traditional cultural/heritage activities (museum attendance, visiting historical sites, etc.) these travelers participate in a wide range of activities including culinary activities, attending food and wine festivals and enjoying unique dining experiences

- Travelers enjoying culture and heritage activities fall into five distinct segments
  - **Passionate** - those purposely seeking cultural/heritage activities – 14% or 21.4 million leisure travelers. Typically older, have graduate or professional degree, more than $100,000 HHI; seek destination where buildings and surroundings retain historic character; 77% use destination web sites for planning trips but 65% cite influence or friends and relatives.
  - **Well Rounded** – open to experiencing a variety of activities including cultural/heritage – 12% or 18.4 million leisure travelers; More likely to belong to Gen X, have graduate or professional degree and 87% seek combination of activities that also include shopping, nature, exercise and dining; 91% think it's important/somewhat important to seek new experiences; 54% use general web searches and 51% rely on recommendations from friends and family
  - **Aspirational** -- desire cultural/heritage experiences but have limited experience – 25% or 38.2 million leisure travelers. More likely to be a female Boomer, African-American and middle class. 88% seek a variety of activities with 98% wanting relaxation and relieving stress; 50% use web sites from destinations and 49% rely on recommendations from friends and family
  - **Self Guided** – take advantage of cultural/heritage activities but are not the primary driver for destination choice; 14% or 21,4 leisure travelers; More likely to be male, Caucasian and holding a graduate or professional degree. 78% seek a variety of activities and 85% think it is very/somewhat important to enrich relationship with spouse or partner.
  - **Keep It Light** – don't seek out cultural/heritage activities but participate if perceived as fun/different; 12% or 18.4 million leisure travelers. More likely to be a female Millennial, Caucasian with $100,000 HHI; 86% seek a wide variety of activities; 95% chose activities that create lasting memories; 92% seek enriching relationship with spouse/partner/children. 66% rely on destination web sites and 65% seek recommendations from friends and family

- *Mandala Research, 2012 Report

Insight: African-American Traveler*

- A majority take trips to visit friends and relatives while Gen Y and X travel more for vacation. Overall, 61% stay in hotels and motels and a majority prefer auto travel.
- The highest concentration (52%) of the leisure market resides in the South and mostly take trips within 500 miles of their residence, compared to 800 miles by the total leisure market. **Tallahassee is located within 500 miles of 36 of the nation's DMAs having the highest concentration of African-American households, including 21 of the top 50.**
- Recommendations by family and friends (55%) ranks highest among sources of information when planning a trip, with 54% reviewing web sites of destinations under consideration
- Overall, 44% regularly visit Facebook with the highest usage (70%) among Gen Y & X
- Key motivators for travel mirror those of general leisure travelers:
  - 95% seek relaxation, relieving stress
  - 91% seek lasting memories
  - 81% want enriching relations with spouse or partner
  - 81% seek stimulating or intellectually enriching activities
  - 81% desire pampering as part of the experience – significantly higher than 66% for general leisure travelers
- Trip planning falls within three periods –
  - 29% book between five weeks and six months,
  - 29% plan within 3-4 weeks and
  - 35% plan with two weeks.
  - Only 14% plan within a week or less. Gen Y & X more likely travel with shorter planning times.
- Family reunion travelers are twice as likely to stay at a historic hotel or resort.
- As expected, those with higher income and education participate in more activities, are more intellectually curious with a greater appreciation of history, heritage and culture, especially relating to African Americans.
- Gen Y travelers participate in the greatest number of activities, Boomers and Gen X have the highest participation rate in local culture and heritage.

* Mandala Research, 2012 Report

Insight: Florida Meetings Traveler*

According to VISIT FLORIDA research, business travel accounts for 11% of the state’s domestic visitors. Conventions, group meetings, seminars and training account for 60% of business travel in Florida. Most of these travelers (78%) travel alone and more than two-thirds go to destinations in Central and Southeast Florida.

- The average length of stay for business travelers was 3.1 nights. The majority (73%) of business travelers stated in the state 1-3 nights.
- A majority (57%) of the business travelers stayed in high end hotels with 35% staying in mid-level hotels.
- The average daily expenditure for business travelers is $265.50 (including transportation). When transportation costs are excluded, the average daily expenditure is $157.90 per person per day.
- The average age of the state’s business traveler is 46.3 with an annual average household income of $126,400.
- Florida’s greatest competition for meetings are other warm weather destinations, including California, Texas and Arizona.
- In addition to proximity and prior experience in holding meetings here, Florida has other significant advantages with meeting planners including the propensity of resort properties capable of hosting meetings, large convention centers and substantial and affordable airlift.
- Following the economic downturn and budget cuts for larger one-time events, many planners focus on smaller, regional meetings with greater concern about attendee travel costs and ability to drive. This trend presents an opportunity for Visit Tallahassee with its focus on regional markets and specialization in smaller meetings.
- Event size is a key factor in determining the amount of advance planning time required. Larger events have a 23-31 month planning cycle while smaller events can occur within 12 months. The average planning cycle for meetings in Tallahassee is eight months.
- In addition to attending meetings and trades shows focusing on critical segments (government, associations, corporate and SMERF), Visit Tallahassee will increase email communication with targeted meeting planners. Visit Tallahassee more than doubled effectiveness with its email communication to meeting planners last year.

* Florida Visitor Study 2015

Insight: Florida Resident Traveler*

According to VISIT FLORIDA research, Florida residents took 20.2 million trips in the state in 2014. Nearly all, 99%, traveled by car, averaged 2.1 nights away from home and spent an average of $127 per-person, per day. Most (77%) use paid lodging.

Average Age: 45.1 years. The largest concentration of travelers fall in the 18-34 group (35%), followed by 50-64 (28%) and 35-49 (20%)

Average Party Size: 2.2 persons. Couples makes up 39% of the travelling parties.

Average Household Income; $75,000. 38% make $75,000+; $75,000-$99,000 (16%) and $100,000+ (22%)

Average Length of Stay: 2.1 nights. Two-night stays account for 30% of the visits while 15% stay three nights. One night trips account for 44%.

Primary Activities (Multiple Responses Allowed):

- Beach/Waterfront (25%)
- Culinary/Dining (23%)
- Shopping (21%)
- Theme/Amusement Park (21%)
- Visit Friends & Relatives (14%)
- Nightlife (15%)
- Touring/Sightseeing (13%)
- Concerts/Theater/Dance (8%)
- Parks – National & State (10%)

Top Origin Areas: Tampa/St. Petersburg (15%), Orlando (14%), Jacksonville (10%), Miami (12%), Jacksonville (9%), Fort Lauderdale (7%), Not an MSA (8%), West Palm Beach (7%), Sarasota/Bradenton (4%), Fort Myers/Cape Coral (4%), Tallahassee (3%)

Top Destinations: Orlando (38%), Tampa/St. Petersburg (12%), Not in any MSA (8%), Jacksonville (7%), Fort Lauderdale (4%), Daytona Beach/Ormond Beach (6%), Miami (4%), Palm Bay/Melbourne (3%), Sarasota/Bradenton (3%), Gainesville (2%)

*Florida Visitor Study/2015 – VISIT FLORIDA

Insight: US Vacationers To Florida*

Primary Purpose of Trip: Leisure (89%) – General Vacation (37%), Visit Friends/Relatives (25%), Getaway Weekend (13%), Special Event (7%)

Seasonality: Winter (24%), Spring (30%), Summer (29%), Fall (16%)

Travel Party Size – Average 2.1 persons) – Couples 37%, One Adult 36%, Families 16%, Three or more adults 6%, Two males or two females 5%

Primary Activities
- Nature – Beach/Waterfront (41%), Parks – National/State (10%), Wildlife Viewing (6%)
- Family/Life Events – Visit Friends/Relatives (34%), Holiday Celebration (5%), Personal Special Event (7%)
- General – Shopping (32%), Business (4%), Spa (2%)
- Libation/Culinary – Culinary/Dining (34%), Winery/Brewery/Distillery (1%)
- Attractions – Nightlife (13%), Theme/Amusement Park (18%), Gambling (3%), Zoo/Aquarium (4%)
- Culture – Touring/Sightseeing (16%), Movies (8%), Historic Sites (8%), Concerts, Theater, Dance (5%), Festivals/Fairs (6%), Museums/Art Exhibits (6%)
- Outdoor Sports – Golf (4%), Water Sports (5%), Fishing (4%), Hiking (2%), Biking (3%)

Average Expenditure (Per Person/Per Day) -- $156.40 (Lodging $56.30, Transportation $44.40, Food & Beverage $35.50, Shopping $18.30, Entertainment/Recreation $19.20, Other $4.20)

Length of Stay – Average 4.2 nights – 1-3 nights 53%, 4-7 nights 38%, 8+ nights 10%

Reservation Type (94% made reservations in advance) – Online 45% with 28% using hotel website, 23% using direct to location.

Top Origin DMAs – New York (11.6%) , Atlanta (6.1%), Chicago (3.6%), Philadelphia (3.2%), Washington DC (3.0%), Boston (2.9%), Dallas-Fort Worth (2.0%), Detroit (2.0%), Los Angeles (1.7%), Cleveland-Akron (1.7%), Charlotte (1.7%, Raleigh-Durham (1.6%), New Orleans (1.6%), Houston (1.5%), Baltimore (1.4%)

Top Origin States – Georgia (9.6%), New York (9.3%), Texas (6.0%), Ohio (5.2%), Pennsylvania (5.2%), Michigan (4.4%), New Jersey (4.4%), Illinois (4.3%), North Carolina (4.0%), Alabama (3.9%), California (3.5%), Virginia (3.5%), Indiana (3.4%), Maryland (3.0%), South Carolina 2.8%)

Age of Travelers – Average Age 47.5 – 18-34 years 26%, 35-49 years 31%, 50-64 years 25%, 65+ years 18%

Generational Breakdown:
- Millennial (1981 – Present) – 26%; 6 PP increase from 2014
- Generation X (1965-1980) – 33%; 1 PP decrease from 2014
- Boomers (1946-1964 – 33%; 3 PP decrease from 2014
- Silent (1945 and earlier) – 8%; 2 PP decrease from 2013

Life stage Breakdown:
- Young & Free (18-34, any income, no kids) – 13%; 1 PP increase from 2014
- Young Family (18-34, any income with kids) – 14%; 3 PP increase from 2014
- Maturing & Free (35-54, any income, no kids) – 17%, 1 PP decrease from 2014
- Moderate Family (35-54, <$75K, with kids) – 8%; 1 PP increase from 2014
- Affluent Family (35-54, $75K+, with kids) – 15%, 3 PP decrease from 2014
- Moderate Mature (55 and older, <$100K, no kids) – 18%, 2 PP decrease from 2014
- Affluent Mature (55 and older, $100K+, no kids) 15%; 2 PP increase from 2014

*Florida Visitor Study/2015 – VISIT FLORIDA

Comparing Florida Auto Travelers & Leon County Visitors

	Auto Visitors To Florida*	2016 Leon County Visitors**
Pct. By Car/Total	58.6%/106.6 Million	82.5%/2.3 Million
Avg. Party Size	2.2	2.6
Avg. Expenditures Per Person Per Day	$130.70	$88.46
Avg. Stay	3.9	2.6
Median Age	46.0	45.25
Median HHI	$94,300	$83,075
Seasonality		
• Winter	24% (Dec-Feb)	29.9% (Q2)
• Spring	30% (Mar-May)	25.9% (Q3)
• Summer	32% (Jun-Aug)	22.3% (Q4)
• Fall	15% (Sep-Nov)	21.7% (Q1)

* 2015 Domestic Auto Visitors to Florida, VISIT FLORIDA
** Economic Impact of Tourism Report FY 2016, Downs-St.Germaine Research