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DestinationMAP

VOLUME II

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Prepared for:
Visit Jacksonville



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Prepared for:
Visit Jacksonville

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2015 DESTINATIONMAP VOLUME II Key Findings for Jacksonville

DestinationMAP is a comprehensive study of meeting planners and the meetings market in North America. The report provides a detailed description of meeting planners' preferences and their perceptions of 40 North American markets. **DestinationMAP** is in its sixteenth edition, which allows for trend analysis of the issues most important to meeting planners in site selection.

DestinationMAP is presented in two volumes. Volume I is a state-of-the-industry report and is presented in identical fashion to all subscribers. Volume II is customized for Jacksonville and reports on Jacksonville and four of the 40 markets included in the survey. The four competitive markets selected by Visit Jacksonville are Charlotte, Louisville, Orlando and Tampa/St. Petersburg.

Key Findings

Jacksonville's key performance indicators in the group hotel segment have been mixed.

While the meetings industry is healthy across the U.S., Jacksonville has lost ground in terms of group demand. The bright spot for Jacksonville is group ADR which grew at a faster rate compared to the industry overall. Strong group ADR coupled with negative group demand netted Jacksonville positive RevPAR growth although not at industry levels. Jacksonville is up against tough competition with Charlotte, Louisville, Orlando and Tampa/St. Petersburg. All but Charlotte posted gains in group demand. (More details in Section 1)

Meeting planners are choosing Jacksonville as a site for future major (300+ participants) meetings at a lower rate compared to other destinations in Jacksonville's competitive set.

Familiarity with Jacksonville is low among meeting planners and at a level similar to Louisville. Among those meeting planners familiar with Jacksonville, almost one-third held a major meeting in Jacksonville in the past two years. However, a higher proportion of meeting planners held a major meeting in three out of four of Jacksonville's competitive set destinations in the past two years. A further challenge is that roughly one in eight meeting planners selected Jacksonville for future major meetings which is at lower rate compared to the other destinations (with the exception of Louisville) within its competitive set for this metric. (More details in Section 3)

Jacksonville has challenges as a convention site while Jacksonville’s reputation as a site for business meetings and as a vacation destination is about average. All measures saw improvement over 2013.

Ratings of Jacksonville as a convention site are well below the industry average. Louisville is the closest competitor as a convention center while Orlando lands the top position among the competitive set. As a business meeting site Jacksonville is close to average but still below all four destinations in its competitive set. Jacksonville’s strongest competitive position is as a vacation destination, rating above Louisville and Charlotte. The good news is that Jacksonville has improved in all three areas compared to 2013. (More details in Section 4)

Average Rating		
Rated on a 1-10 scale where 1="poor" and 10="excellent"		
	Jacksonville	40 Destination Average
Business meeting site	7.8	8.1
Vacation site	7.3	7.6
Convention site	6.6	8.0

Jacksonville is generally positioned well as a destination in logistical areas that matter most to meeting planners with one exception: adequate number of hotel rooms.

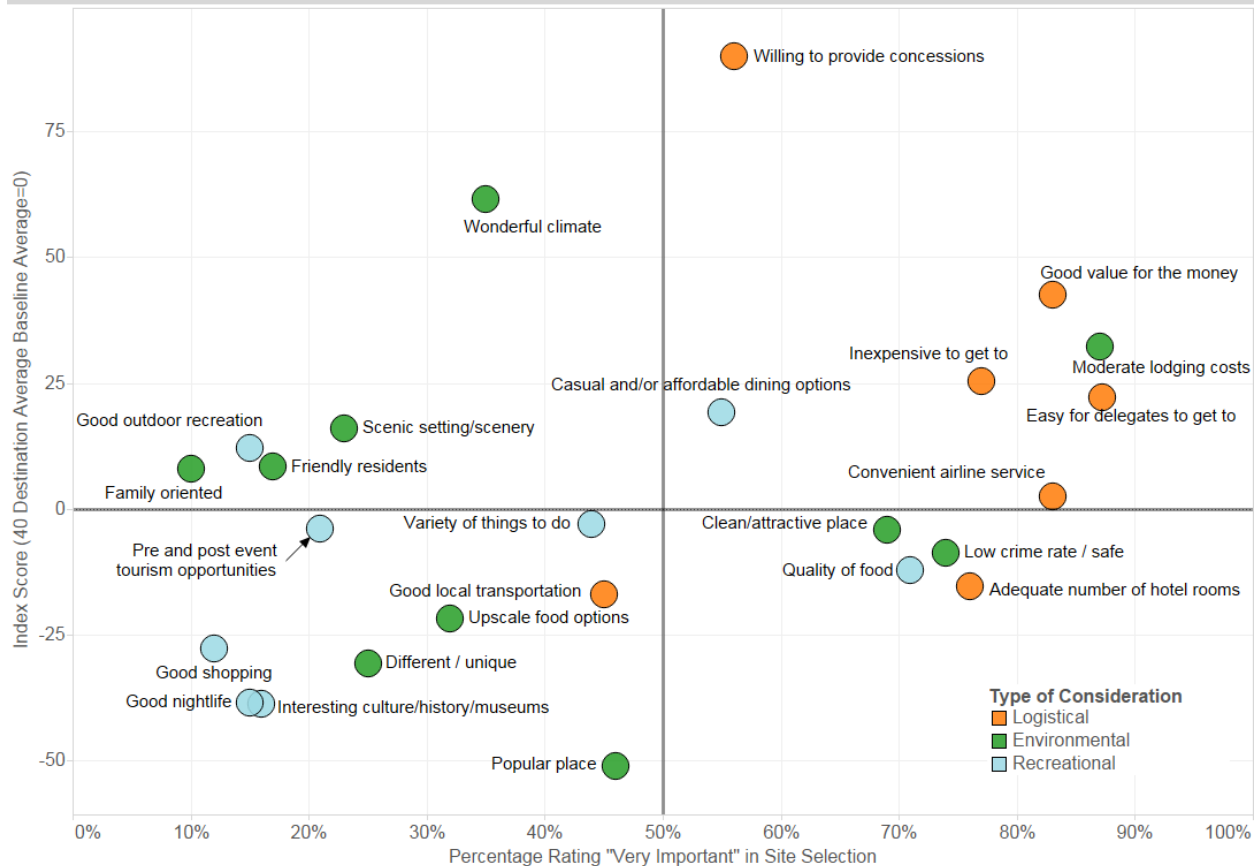
The chart on the next page is a useful summary of the areas of strength and concern for Jacksonville as a destination. It plots the importance of site selection considerations against Jacksonville’s rating relative to the overall competition. The upper right quadrant is the optimum position because this is where Jacksonville performs ahead of the competition in areas that matter most to meeting planners. The lower right quadrant is the “area of concern” because Jacksonville is not performing as well as the industry in areas that matter most to meeting planners. The 26 considerations evaluated are clustered into three major areas: logistical, environmental and recreational.

Jacksonville stands above or even with the **DestinationMAP** norm on about half of the 26 travel image considerations. Jacksonville performs above average for the majority of logistical considerations (noted in orange), particularly for the attributes “willing to provide financial/other concessions” and “good value for the money.” Meeting planners consider Jacksonville to have below-average local transportation, but this is by far the least important attribute in this category. The only logistical area of concern is the rating in “adequate number of hotel rooms” which is a highly important logistical consideration for meeting planners where Jacksonville rated below the **DestinationMAP** average.

Jacksonville earns high marks on one environmental consideration (noted in green) that is considered most important by meeting planners (moderate lodging costs). Two environmental considerations also considered important by meeting planners are rated below average (clean/attractive place and low crime rate/safe). Notable (and not surprising) is the high environmental rating for Jacksonville as a place with a wonderful climate.

In the recreational category (noted in blue), specifically food, Jacksonville lands in a mixed position. Both casual/affordable dining options and quality of food are important to meeting planners and Jacksonville rates above average in the first area and below average in the second area. Jacksonville rates below average in all other recreational considerations except good outdoor recreation. These other recreational areas are considered less important by meeting planners. (More details in Section 5.2)

Travel & Destination Positive Image Overall Performance Matrix - Jacksonville
Indexed Score By Importance of Consideration
 (Note: 0= Average Baseline Score Across 40 Destinations)



Competitively, Jacksonville tops its four competitive destinations on three of 26 considerations. Jacksonville is up against tough competition with Orlando and Louisville dominating on the other considerations. Jacksonville is rated well below the four competitive destinations on planners' perceptions related to crime and safety. (More details in Section 5.3)

Among negative considerations, one of the only challenges for Jacksonville is "aging hotels."

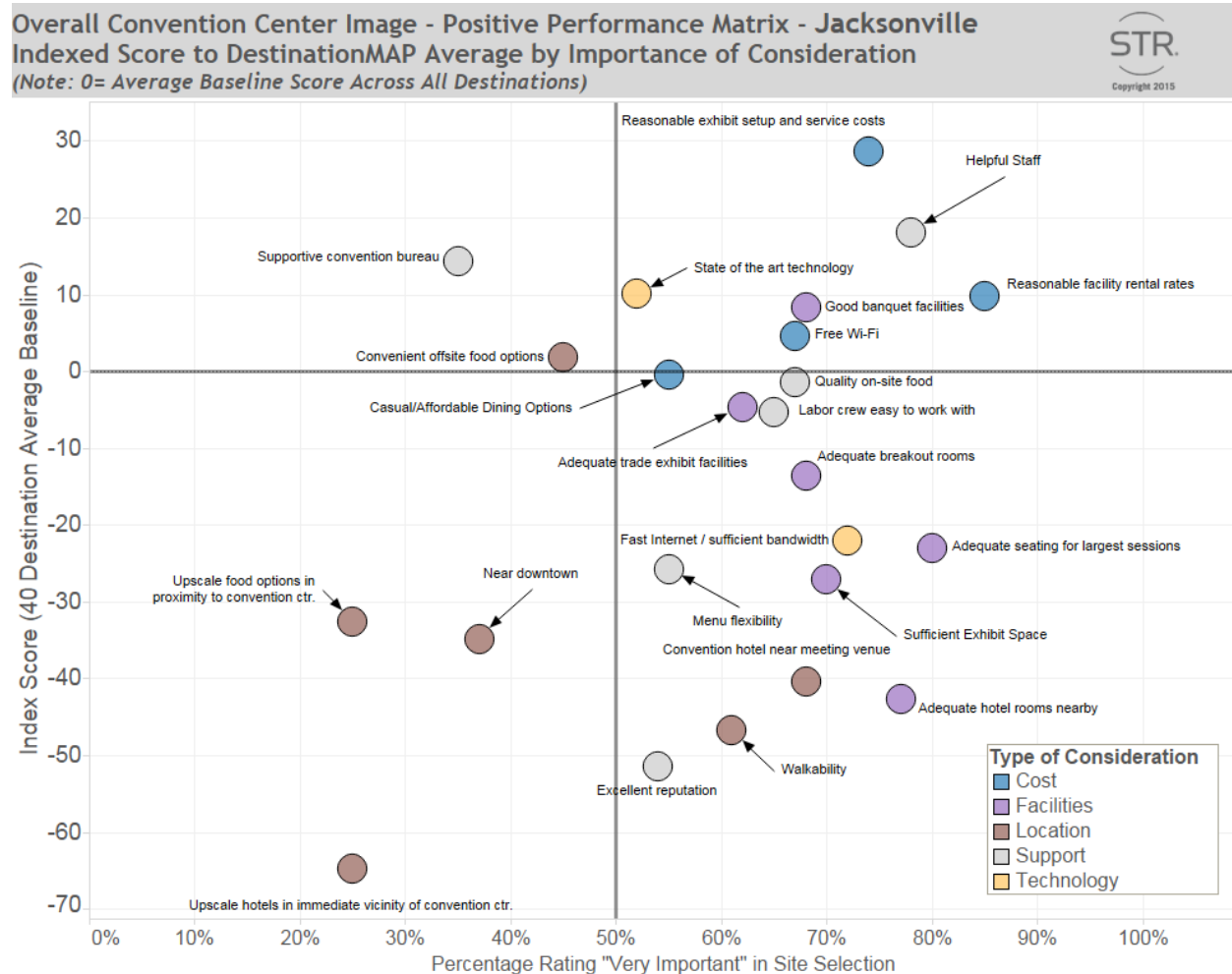
The greatest area of concern for Jacksonville is "aging hotels;" Jacksonville faces a strong negative perception in this area. For all other important attributes, Jacksonville rates either on par for environmental deterrents or significantly better (cost deterrents) than the overall average. (More details in Section 5.5)

Jacksonville has significant challenges with its convention center.

Similar to the earlier chart showing Jacksonville's overall image among meeting planners, the following chart is a useful summary of areas of strength and concern for Jacksonville's convention center. Roughly half of all attributes fall into the "quadrant of concern" area for Jacksonville, which indicates many challenges ahead for Jacksonville's convention center. One bright spot is in the area of cost. Jacksonville earns above average ratings for most cost considerations (noted in blue).

Jacksonville scored below the average baseline for all attributes related to facility (noted in purple) and location (noted in brown), excluding "good banquet facilities" and "convenient offsite food options," both of which were slightly above the norm. "Adequate hotel rooms nearby" seems to be the greatest weakness in terms of importance and overall rating, which is significantly below the baseline average.

In technology (noted in yellow) Jacksonville rates slightly above average for "free Wi-Fi" but somewhat below average for "fast internet/sufficient bandwidth," both of which are increasingly-important attributes related to web access. (More details in Section 5.8)



Louisville and Orlando are, by far, the dominant destinations within the competitive set in terms of convention center perception. While Jacksonville did not lock up the top spot for any of these attributes, it did fall in a close second-place spot to Orlando for “state of the art technology.” (More details in Section 5.9)

Jacksonville’s destination website is visited less frequently and trade booths are visited more frequently compared to the overall average for meeting planners.

About one-third of all meeting planners visited Jacksonville’s destination website and this is well below the average website usage across all 40 destination markets tested. Websites are considered the most important source of information among meeting planners, so it is critical for a destination to maintain a quality website. About one-third of all meeting planners visited Jacksonville’s trade booths, exceeding the industry average. Trade booth visits are the second most important source of information among meeting planners after destination websites. Because of the importance meeting planners place on this channel, maintaining a trade booth presence at trade shows is critical. (More details in Section 6)

Additional Inquiries

The **DestinationMAP** data, when coupled with STR data, provide a comprehensive view of meetings to representatives of the hospitality industry. With new techniques and ways of segmenting and visualizing the data there are opportunities to go beyond the topics and details provided in this report. For more specific insights into the nature of the meetings market, the performance of specific meetings in a destination and the preferences of meeting planners, contact us:

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