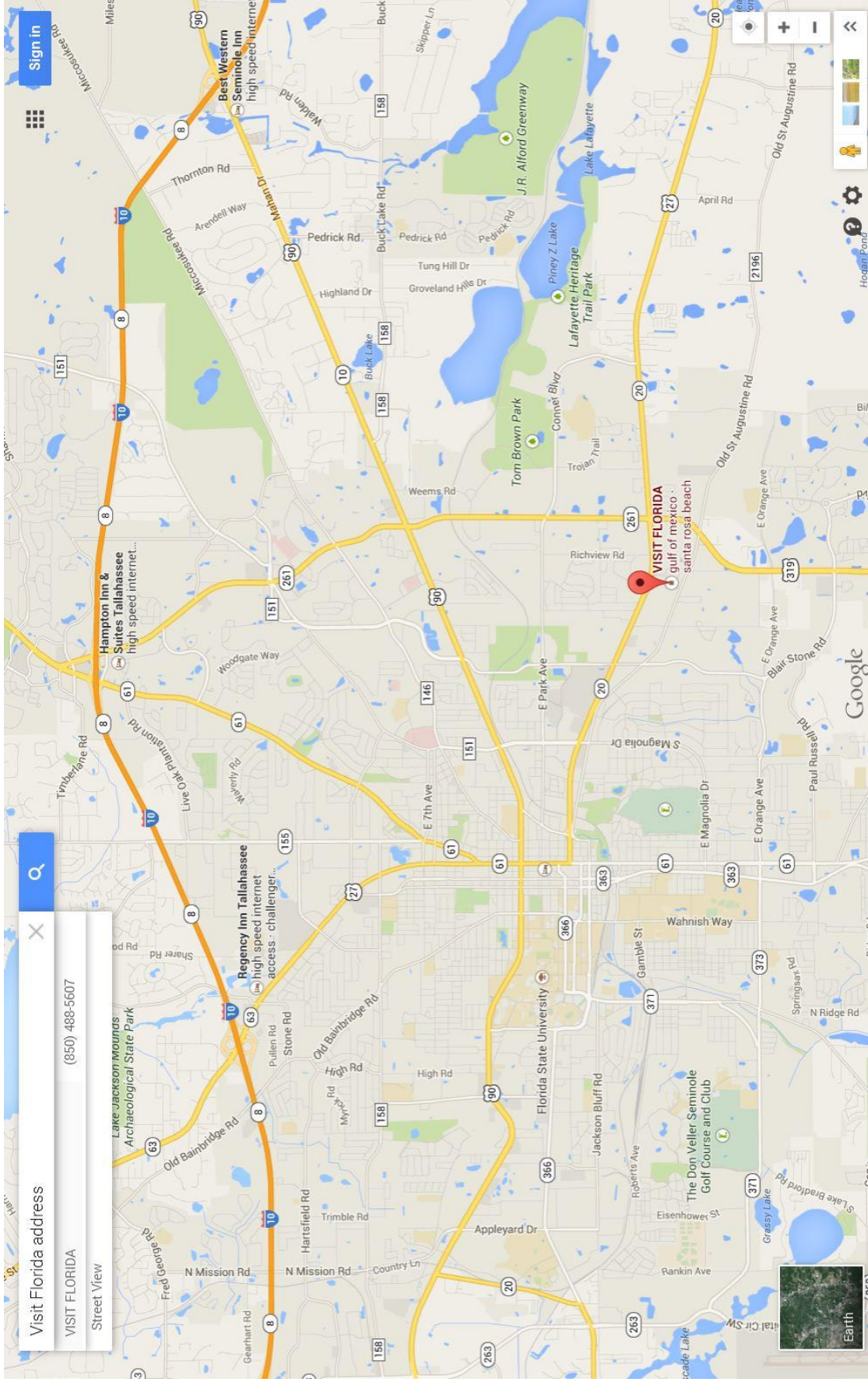


PUBLIC WORKSHOP NOTICE

There will be a public workshop of the Original Florida Tourism Task Force on May 24, **2016**. The meeting will be held at **VISIT FLORIDA, Multi-Purpose Room, 2540 Executive Circle West, Suite 200, Tallahassee, Florida**, beginning at **1:00 p.m.**



The Original Florida
TOURISM TASK FORCE
Public Workshop Agenda

Visit Natural
NORTH FLORIDA

VISIT FLORIDA, Multi-Purpose Room
2540 Executive Circle West, Suite 200
Tallahassee, Florida

May 24, 2016
Thursday 1:00 p.m.

- I. Call to Order, Introductions
- II. Presentation and Review of the 2015-16 VISIT FLORIDA Rural Area of Opportunity Partnership Travel Show Program and discussion of the 2016-17 VISIT FLORIDA Rural Area of Opportunity Partnership Program

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Visit Natural
NORTH FLORIDA

Visit Natural **NORTH FLORIDA**

May 20, 2016

Ms. Joanna Price, Marketing Operations Manager
VISIT FLORIDA
2540 West Executive Center Circle, Suite 200
Tallahassee, FL 32301

RE: North Central Florida Rural Area of Opportunity Partnership
2016 Travel Show Report

Dear Joanna:

As per the August 11, 2015 agreement between VISIT FLORIDA and The Original Florida Tourism Task Force, please find enclosed one copy of the North Central Florida Rural Area of Opportunity 2016 Travel Show Report. An invoice with documentation for Task Force expenses will be sent to you under separate cover.

If you have any questions concerning this matter, please do not hesitate to contact Steven Dopp, Senior Planner, at 352.955.2200, extension 109.

Sincerely,



Scott R. Koons, AICP
Executive Director

Enclosure

The Original Florida Tourism Task Force
2009 NW 67th Place
Gainesville, FL 32653-1603
352.955.2200 · 877.955.2199

North Central Florida Rural Area of Opportunity Partnership 2015-16 Travel Show Season Report



May 24, 2016

The Original Florida Tourism Task Force
2009 NW 67th Place
Gainesville, FL 32653-1603
352.955.2200

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Executive Summary

The Task Force favors travel shows as a marketing strategy since they provide an opportunity to introduce an unknown product to consumers, influence travel decisions and receive direct feedback from potential visitors to gauge reaction to Natural North Florida. Additionally, travel shows place Natural North Florida on par with destination marketing organizations with larger marketing budgets.

This year, the VISIT FLORIDA Rural Area of Opportunity Partnership Program leveraged an estimated \$57,500 of in-kind contributions from Task Force members and other volunteers who staffed Task Force booths as well as staff time spent on the program by the North Central Florida Regional Planning Council. The program also allowed the Task Force to apply for and receive \$150,000 in state matching grant funds. These funds were used to develop a new website, distribute brochures at hotels along interstate highways, publish a quarterly newsletter, as well as other marketing programs to drive visitors to the new website.

The Original Florida Tourism Task Force exhibited at nine domestic and three international travel shows during the 2015-16 travel show season. The travel shows were selected based on Task Force member knowledge of its top feeder markets as well as 2014 American Express Destinations Insights reports and Google Analytics data. Task Force booth teams noted strong consumer interest in the region at every show. Interest was particularly strong at outdoor adventure travel shows such as the Toronto Outdoor Adventure Show and recreational vehicle shows such as the Chicago RV and Camping Show. Overall, the Task Force distributed 27,250 pieces of collateral material at the 12 shows.

During State Fiscal Year 2014-15, Natural North Florida Tourist Development Tax (i.e., bed tax) revenues, the first year of the Rural Areas of Opportunity Partnership, increased by 8.9 percent over 2013-14 levels. Statewide, bed tax revenues increased by 12.6 percent during this time period. **For the 2015-16 State Fiscal Year, through February 2016, Natural North Florida bed tax revenues increased by 15.9 percent over Fiscal Year 2014-15, whereas statewide bed tax revenues increased 10.0 percent.** Many of the Task Force members attribute the increase in bed tax revenues to the VISIT FLORIDA Rural Areas of Opportunity Partnership travel show program.

Google Analytics reports the percentage of Florida-based users accessing the Task Force website increased from 60.0 percent in 2011 to 74.9 percent in 2015. At the same time, the percentage of mobile devices accessing the website increased from 8.5 percent in 2011 to 51.9 percent in 2015. Since Google Analytics identifies mobile devices by the location from which the website is accessed, instead of the billing address or place of residence of the device owner, the percentage of international and domestic visitor interest in the region is likely higher than suggested by Google. In order to better understand the Visit Natural North Florida market, it is recommended that the Task Force purchase a one-year subscription to VisaVues domestic and international editions through VISIT FLORIDA with its Fiscal Year 2016-17 Regional Rural Development Grant.

For Fiscal Year 2016-17, the Task Force recommends continuing the travel show program and increasing the number of travel shows to 16, including a European outdoor adventure show. Three of the 16 travel shows will be funded from the Task Force Regional Rural Development grant. After consultation with RiverWay South, it is recommended that the two organizations exhibit at five combined shows with each combined show consisting of one 10' x 20' booth shared by both with two representatives from each organization. It is further recommended that each organization use a large map displaying its location as well as the large amount of government-owned conservation land located in each region. Such maps can be used individually at individual shows and be placed side-by-side at the combined shows, providing a unifying theme for the two regions.

The Task Force estimates that its maximum operational capacity is 18 travel shows per travel show season. However, the number of attractive shows is significantly higher. Therefore, it may soon be necessary to place some shows on a two-year or three-year rotation to maintain a Task Force presence in all of the desired markets.

Finally, it is recommended that the VISIT FLORIDA advance payment to the Task Force be increased from \$25,000 to \$50,000. The cost-reimbursable nature of the Partnership has placed a significant strain on the available working capital of the Task Force. Increasing the deposit from \$25,000 to \$50,000 will help alleviate potential cash flow challenges and reduce the likelihood of the Task Force requesting reimbursements during the travel show season.

Introduction

This report presents the results of the second year of the North Central Florida Rural Area of Opportunity Partnership. It presents statistics on attendance and collateral distributed at the 12 trade and travel shows attended by The Original Florida Tourism Task Force. The report also includes information on users of the Visit Natural North Florida website (www.vnnf.org) as provided by Google Analytics. Based on the experience of the Task Force at the trade and travel shows, combined with the website user data, the report includes recommendations for the Partnership.

North Central Florida Rural Area of Opportunity and The Original Florida Tourism Task Force

The North Central Florida Rural Area of Opportunity was created by the State of Florida in recognition of the need for economic assistance in the area. The North Central Florida Rural Area of Opportunity is comprised of the following rural counties: Baker, Bradford, Columbia, Dixie, Gilchrist, Hamilton, Jefferson, Lafayette, Levy, Madison, Putnam, Suwannee, Taylor and Union Counties. Due to their membership in The Original Florida Tourism Task Force, Alachua and Wakulla Counties were also included in the promotional effort.

The Original Florida Tourism Task Force, doing business as Visit Natural North Florida, represents the North Central Florida Rural Area of Opportunity for VISIT FLORIDA in the promotion of the region to tourists. The North Central Florida Regional Planning Council provides staff to the Task Force.

Partnership Description

The Partnership allows tourism marketing representatives from Natural North Florida to talk directly to potential tourists at “out of state” consumer shows where potential tourists go to learn about the tourism products the Rural Area of Opportunity has in abundance.

This is a VISIT FLORIDA consumer show promotion campaign for Florida counties designated as the North Central Florida Rural Area of Opportunity and provides a means whereby VISIT FLORIDA can promote economic development through increased tourism.

The selection of consumer shows is based on the following criteria: (1) Does the target audience of the show have the likelihood of visiting the region due to the psychographics of the audience; (2) Are the attendees from a highly ranked feeder city for the region; and (3) Is the consumer show likely to attract sufficient numbers of people who are favorably predisposed to the types of tourist-oriented attractions found in Natural North Florida.

Purpose: To Attract Visitors to the North Central Florida Rural Area of Opportunity

The purpose of the Partnership is to provide financial assistance to the North Central Florida Rural Area of Opportunity through the creation of a partnership that focuses on selling the nature-based products of the region to individual consumers and trade professionals. The partnership has helped showcase the adventure travel of the area: Boating, recreational vehicle and camping facilities, paddle activities, bicycling, bird watching, unique getaway vacation spots and the other product elements of north central Florida.

This has been accomplished through the staffing of booths by Task Force members at nine domestic out-of-state travel adventure shows, one international outdoor adventure show and two international travel trade/consumer shows. The shows have given consumers and trade professionals the opportunity to learn about this undiscovered part of the Florida market.

Goals

One goal of Partnership is to create more awareness about the unique nature-based resources of the north central Florida region and encourage visitors traveling along the I-75 and I-95 corridors to explore the area, attract specific niche markets and to catch the attention of the international markets whose psychographics fit Natural North Florida.

Another Partnership goal is to generate frequent day trips into the area; thus, generating a greater appreciation of this “one of a kind” piece of the Florida experience. Over time, these frequent visitors will convert into longer stays in order to explore the entire area. The longer stays will grow the bed tax, sales tax and employment opportunities and contribute to economic growth.

Partnership Advantages

The Partnership allows Destination Marketing Organizations within the North Central Rural Area of Opportunity to staff travel show booths, promote the region as well as the entire State of Florida. It also allows rural north central Florida Destination Marketing Organizations to use market research to target identified feeder cities for tourism promotion and to appraise the reactions of show visitors to Natural North Florida (which has been overwhelmingly positive).

The Partnership also provides VISIT FLORIDA visibility at consumer shows without expanding their consumer show department and allows Natural North Florida to promote the entire Florida product, set-up a booth designed by VISIT FLORIDA to help to promote its brand, and distribute collateral material, such as the Florida State Parks Guides, which promotes the entire state. By limiting the number of shows attended by any one Task Force member, Task Force members are able to stay fresh and enthusiastic at each show.

Although the Task Force did not make a direct financial contribution to the Partnership, the salaries of Task Force members who attended the travel shows were paid for by their member organizations. Their time, as well as that of volunteers who attended the travel shows, amounts to 101 days with an estimated value \$32,000 of in-kind contributions to the Partnership. Additionally, North Central Florida Regional Planning Council contributed staff time to the project. The estimated value of the Planning Council in-kind contribution is \$25,000. Finally, the Levy County Visitors and Conventions Bureau contributed \$500 for a Cedar Key Getaway package which was used as a drawing for the gathering of email addresses at the travel shows.

Travel Show Reports

The Task Force exhibited at 12 travel shows during the 2015-16 travel show season, an increase of four shows over last year's Rural Area of Opportunity grant. The Coordinator attended seven shows. A total of 12 different Task Force members and volunteers staffed booths at the travel shows. Typically, Task Force members and volunteers attended one or two travel shows each. The salaries of Task Force members for their time while attending the various travel shows are paid by their member organizations. Table 1 identifies the travel shows at which the Task Force exhibited.

Table 1
VISIT FLORIDA - Visit Natural North Florida 2015-16 Travel Show Schedule

Show	Show Dates
Detroit Camper and RV Show	September 30 - October 3, 2015
London World Travel Market	November 2 - 5, 2015
Atlanta Boat Show	January 14 - 17, 2016
New York Times Travel Show	January 8 - 10, 2016
Atlanta Camping & RV Show	January 29 - 31, 2016
Dallas Travel and Adventure Show	January 30 - 31, 2016
Chicago RV & Camping Show	February 17 - 21, 2016
Toronto Outdoors Adventure Show	February 19 - 21, 2016
Washington, DC Travel Expo	February 20 - 21, 2016
Int'l Internationale Tourismusbörse Berlin, Germany	March 9 - 13, 2016
Canoecon	March 11 - 13, 2016
Philadelphia Travel and Adventure Show	March 19 - 20, 2016

Table 2 provides summary statistics on the 12 travel shows.

Table 2
Total Travel Show Statistics

Item	Amount
Total Attendance	541,434
Florida State Parks Guides	4,650
Florida State Transportation/Road Maps	5,850
North Central Florida Rural Area of Opportunity Brochures	11,050
Other Regional Brochures	5,514
Emails Collected	1,599
USB Press Kits	187
Meetings with Media, Trade Professionals	232

As can be seen in Table 2, attendance at the 12 travel shows exceeded 500,000, although more than half of the attendance figure (330,000) was attributable to the ITB Berlin and London World Travel Market shows. Excluding these shows, attendance averaged 21,643 per show, or 6,670 per travel-show day. Table 1 also indicates that 11,050 16-county VISIT FLORIDA-prepared brochures as well as 5,514 other regional brochures were distributed at the shows.

Detroit Camper and RV Show - September 30 - October 4, 2015
Booth Team: Donna Creamer and Cody Gray

The Detroit Camper and RV Show was held approximately 30 miles from Detroit at the Suburban Collection Showplace in Novi Michigan. It is the largest recreational vehicle show in the state. This was the first year which the producers of the show, the Michigan Association of Recreation Vehicles and Campgrounds, allowed out-of-state exhibitors. As such, Visit Natural North Florida was the only Florida destination exhibiting at the show. Booth team members noted that show attendees exhibited greater knowledge of the region than at other shows but assumed, as at every other recreational vehicle show attended by the Task Force, that the area's recreational vehicle parks were full during the winter. Interest in the region was storing as evidenced by the large number of Rural Area of Opportunity brochures distributed at the show as reported in Table 2.

Detroit is ranked as the 21st out-of-state feeder market based on American Express Destination Insights 2014 credit card usage data and 22nd by Google Analytics for out-of-state metropolitan area Task Force website users, 2011- 2015.

Table 3
Detroit Camper and RV Show Statistics

Item	Amount
Total Attendance	25,600
Florida State Parks Guides (ran out)	300
Florida State Transportation/Road Maps (ran out)	600
North Central Florida Rural Area of Opportunity Brochures	1,500
Other Regional Brochures	0
Emails Collected	63
USB Press Kits	0
Meetings with Media, Trade Professionals	0



Visit Natural North Florida at Detroit

London World Travel Market - November 2 - 5, 2015
Booth Team: Roland Loog and Sandy Beach

The London World Travel Market is the second-largest travel trade and consumer show in the world and served as Visit Natural North Florida's introduction to the United Kingdom market. The United Kingdom is ranked as the second-largest largest foreign market for the Task Force based on Google Analytics for website users by country, 2011 - 2015.

Attendees showed strong interest in unique, soft, outdoor adventures of the region. Booth staff held multiple meetings with members of the United Kingdom travel profession which may result in future collaborative efforts to market Visit Natural North Florida in the United Kingdom.

Table 4
London World Travel Market Statistics

Item	Amount
Total Attendance (includes 50,000 consumers)	150,000
State Parks Guides (ran out)	200
Florida State Transportation/Road Maps	0
North Central Florida Rural Area of Opportunity Brochures	600
Other Regional Brochures	200
Emails Collected	20
USB Press Kits	60
Meetings with Media, Trade Professionals	71



Task Force Counter at World Travel Market

New York Times Travel Show - January 8 - 10, 2016

Booth Team: Roland Loog and Dawn Taylor

The New York Times Travel Show, held at the Jacob Javits Convention Center in Manhattan, had representatives from all over the world manning booths selling luxury, adventure, and family travel. Attendees appeared interested in quaint, off-the-beaten path destinations such as Natural North Florida. The show also allowed the Task Force to be part of the VISIT FLORIDA team. This market knew little about the region and was surprised at the quantity and quality of the nature-based product while being easily accessible to major airport hubs. The show also gave the Task Force an opportunity to meet with travelers/travel professionals from outside the established market for the region. Task Force staff presented a talk on Natural North Florida which was lightly attended.

New York is ranked as the number four out-of-state feeder market based on American Express Destination Insights 2014 credit card usage data and second by Google Analytics for out-of-state metropolitan area Task Force website users, 2011 - 2015.

Table 5
New York Times Travel Show Statistics

Item	Amount
Total Attendance	29,061
Florida State Parks Guides (ran out)	500
Florida State Transportation/Road Maps	600
North Central Florida Rural Area of Opportunity Brochures	600
Other Regional Brochures	410
Emails Collected	200
USB Press Kits	52
Meetings with Media, Trade Professionals	52



Last Year's Travel Contest Winner at This Year's New York Times Show

Atlanta Boat Show - January 14 - 17, 2016
Booth Team: Roland Loog

The Atlanta Boat Show, held at the World Congress Center, is one of the largest boat shows in the country. The attendees are avid motorboat enthusiasts living in the number one "Out of State" feeder market for north central Florida. Many attendees were familiar with the Natural North Florida area, but unaware of the multitude of services and sites available within the region, particularly in the Big Bend.

Atlanta is ranked as the number one out-of-state feeder market based on American Express Destination Insights 2014 credit card usage data and first by Google Analytics for out-of-state metropolitan area Task Force website users, 2011- 2015.

Table 6
Atlanta Boat Show Statistics

Item	Amount
Total Attendance	24,000
Florida State Parks Guides (ran out)	400
Florida State Transportation/Road Maps	400
North Central Florida Rural Area of Opportunity Brochures	600
Other Regional Brochures	62
Emails Collected	48
USB Press Kits	0
Meetings with Media, Trade Professionals	0



Main Showroom at the Atlanta Boat Show

Atlanta Camping & RV Show - January 29 - 31, 2016
Booth Team: Roland Loog and Russ McCallister

The Atlanta Camping & RV Show is the largest all-indoor recreational vehicle show in Georgia. The attendees are interested in north Florida camping and outdoor activities. It is the second show attended by the Task Force in Atlanta as it is the number one out-of-state feeder market for north central Florida.

As previously noted, Atlanta is ranked as the number one out-of-state feeder market based on American Express Destination Insights 2014 credit card usage data and first by Google Analytics for out-of-state metropolitan area Task Force website users, 2011- 2015. When including Florida metropolitan areas, Atlanta is ranked as the third largest feeder market based on American Express data and the 7th-largest market based on Google Analytics.

Subsequent to the show, booth members identified several show attendees at recreational vehicle campgrounds in Dixie County and paddling the Suwannee River.

Table 7
Atlanta Camping & RV Show Statistics

Item	Amount
Total Attendance	20,000
Florida State Parks Guides (ran out)	500
Florida State Transportation/Road Maps (ran out)	600
North Central Florida Rural Area of Opportunity Brochures	650
Other Regional Brochures (ran out)	1,000
Emails Collected	250
USB Press Kits	0
Meetings with Media, Trade Professionals	0



Kay-Russ McCallister added 2 new photos — at [Atlanta Camping and Rv Show](#).
January 30 · Atlanta, GA ·

Roland Loog working his magic... Day #2



Roland Works his Magic at the Atlanta Camping & RV Show

Dallas Travel and Adventure Show - January 30 - 31, 2016
Booth Team: Donna Creamer and Brenda Graham

The Dallas Travel and Adventure Show is another in a series of shows produced by Unicom. The attendees consider themselves to be within the drive market of Visit Natural North Florida. As with the other travel shows, attendees are unaware of the location of the region and its recreational/tourist-oriented opportunities. However, when informed of the region's location, attendees considered themselves to be within the drive market of Visit Natural North Florida.

American Express Destination Insights 2014 credit card usage data ranks Dallas as the region's number seven out-of-state market. Google Analytics ranks Dallas as 12th for out-of-state metropolitan area Task Force website users between 2011 and 2015.

Booth team members noted that the total number of show hours for the two-day show was rather short at 12.5 hours; with a total attendance of approximately 14,000 meant the show averages over 1,000 visitors per hour. The Natural North Florida Recreational Vehicle and Campgrounds brochure as well as the Natural North Florida Outdoor Adventures brochure were quite popular with attendees.

Table 8
Dallas Travel and Adventure Show Statistics

Item	Amount
Total Attendance	13,985
Florida State Parks Guides (ran out)	350
Florida State Transportation/Road Maps (ran out)	600
North Central Florida Rural Area of Opportunity Brochures (ran out)	1,200
Other Regional Brochures (ran out)	1,650
Emails Collected	235
USB Press Kits	0
Meetings with Media, Trade Professionals	22



Visit Natural North Florida Booth at the Dallas Show

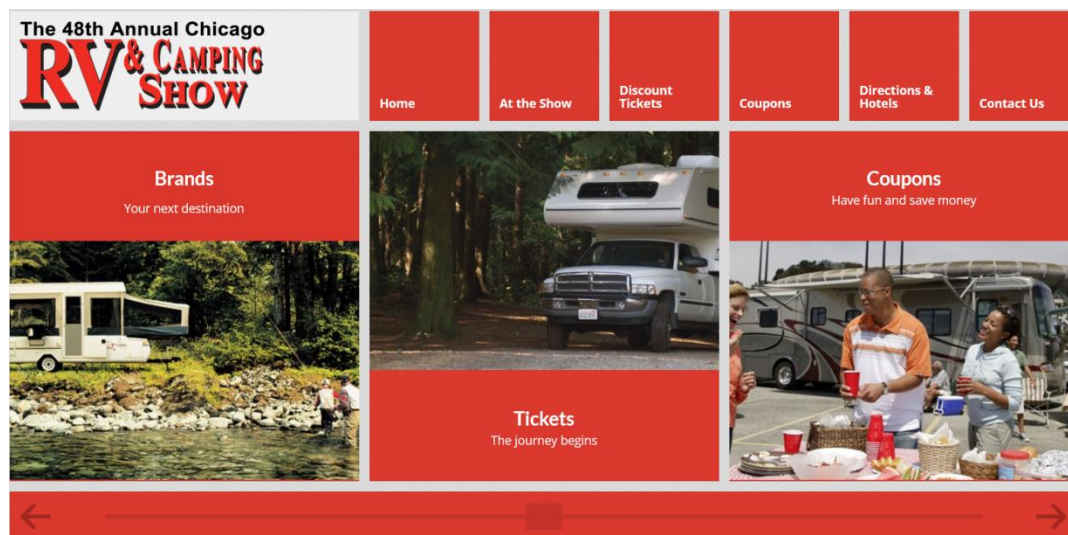
Chicago RV & Camping Show - February 17 - 21, 2016
Booth Team: Diane Bardhi and Roland Loog

The Chicago show, which was held at the Donald Stephens Convention Center in Rosemont, Illinois, is promoted as the largest indoor recreational vehicle and camping show in the United States. This show was, as last year, extremely. Once again the Task Force was the only Florida exhibitor at the show. Furthermore, the Task Force booth was located next to the main entrance. The market at this show was mainly recreational vehicle enthusiasts who frequently travel the I-75 corridor. They were as equally excited as last year about the abundance of recreational vehicle and tent camping opportunities in the region. Given the large number of days for and long hours of the show, booth members report that a third person be added to the booth for next year.

Chicago is ranked as the fifth highest-ranking out-of-state feeder market based on both American Express Destination Insights 2014 credit card usage data by Google Analytics for out-of-state metropolitan area Task Force website users, 2011- 2015. Over the past two years the Chicago Recreational Vehicle and Camping Show has been one of the top-two shows attended by the Task Force in terms of visitor interest.

Table 9
Chicago RV & Camping Show Statistics

Item	Amount
Total Attendance	23,912
Florida State Parks Guides (ran out)	700
Florida State Transportation/Road Maps (ran out)	800
North Central Florida Rural Area of Opportunity Brochures (ran out)	1,500
Other Regional Brochures (ran out)	550
Emails Collected	244
USB Press Kits	0
Meetings with Media, Trade Professionals	0



Chicago RV & Camping Show Website Banner



Diane Bardhi Staffs the Task Force Booth at the Chicago RV & Camping Show

Toronto Outdoors and Adventure Show - February 19 - 21, 2016

Booth Team: Donna Creamer and Katrina Richardson

The Toronto Outdoor Adventure Show was a replacement show for a Toronto recreational vehicle show which was not organized in time for Task Force participation. Nevertheless, the outdoor show was excellent, featuring outdoor-oriented products and activities such as hiking and paddling. Booth team members report strong interest in the region, particularly from Canadian paddlers. The Task Force made a presentation to an audience of approximately 30 people regarding paddling opportunities in north central Florida. Seven of the 30 attendees stopped by the booth after the show to receive more information about the region. One attendee specifically told the booth team that the only reason he attended the show was to hear the Task Force presentation.

Canada is Visit Natural North Florida's highest-ranking international feeder market based on Google Analytics for Task Force website users between 2011 and 2015. Booth team members report that interest in Natural North Florida was strong and equal to that of the Chicago and Canoecopia shows.

Table 10
Toronto Outdoor Adventure Show Statistics

Item	Amount
Total Attendance	27,400
Florida State Parks Guides (ran out)	400
Florida State Transportation/Road Maps (ran out)	600
North Central Florida Rural Area of Opportunity Brochures (ran out)	1,200
Other Regional Brochures	1,150
Emails Collected	99
USB Press Kits	0
Meetings with Media, Trade Professionals	12



Katrina Richardson discusses the region with a show attendee, Toronto

Washington, DC Travel Expo - February 20 - 21, 2016
Booth Team: Dave Mecusker and Susie Page

This show, held at the Washington, DC Convention Center, is an adventure travel show targeting the soft adventure aficionado, an ideal audience for Natural North Florida. Booth team members report that attendees do not know where the region is located or what attractions are available in the region. Visitors to the booth showed strong interest in the area and stated that Natural North Florida is the one part of Florida they have yet to visit.

Washington, DC is the region's 12th highest-ranking out-of-state feeder market based on American Express Destination Insights 2014 credit card usage data. It is ranked as the 3rd highest- market by Google Analytics for out-of-state metropolitan area Task Force website users, for the five year period between 2011 and 2015.

Unicomm, the producers of the show, report attendance as 21,245. However, booth team members felt that attendance was lower than reported by Unicomm due to an unplanned Metro subway system shutdown on Saturday and a rainy Sunday. Despite the suspected lower attendance, booth team members recommend returning to the show in 2017.

Table 11
Washington, DC Travel Expo Show Statistics

Item	Amount
Total Attendance	21,245
Florida State Parks Guides (ran out)	300
Florida State Transportation/Road Maps (ran out)	400
North Central Florida Rural Area of Opportunity Brochures	800
Other Regional Brochures	50
Emails Collected	100
USB Press Kits	0
Meetings with Media, Trade Professionals	0



Visit Natural North Florida at the Washington, DC Show

Internationale Tourismusbörse Berlin, Germany - March 9 - 13, 2016
Booth Team: Roland Loog and Carol McQueen

Internationale Tourismusbörse Berlin, commonly known as ITB Berlin, is the world's largest and most complete travel extravaganza with over 100 nations represented. Task Force booth staff met with approximately 50 travel writers and travel professionals. As with the London World Travel Market, booth staff held multiple meetings with European-based travel professionals which may result in future collaborative efforts to market Visit Natural North Florida in Europe. The Task Force produced and distributed press kits in the form of electronic USB cards for writers and travel professionals that highlighted the region.

Booth members report that, similar to last year, interest was strong among German consumers. The Visit Natural North Florida booth consistently out-drew the neighboring Puerto Rico booth in terms of number of trade show attendees who visited the booth. Although neither booth team member could speak German, language was generally not an issue as most Germans could speak at least some English. Differences between Task Force booth staff and other booth staff were readily apparent at ITB Berlin. Some exhibitors hired young Germans to staff their booths. These booth staffers were unfamiliar with the foreign destinations they represented and were unable to answer questions posed by show visitors. Additionally, the staff at many booths were absent the last day of the show, whereas Task Force booth members staffed its booth until the official closing time.

Google Analytics for the Task Force website suggests that Germany is the 2nd-largest foreign market, excluding Canada, for the five year period between 2011 and 2015. Google Analytics ranks Brazil higher than Germany, but a very high bounce rate for Brazilian users suggests they are not interested in the resource-based attractions of Natural North Florida.

Table 12
Internationale Tourismusbörse Berlin Show Statistics

Item	Amount
Total Attendance	180,000
Florida State Parks Guides (ran out)	100
Florida State Transportation/Road Maps (ran out)	400
North Central Florida Rural Area of Opportunity Brochures (ran out)	1,200
Other Regional Brochures (ran out)	50
Emails Collected	25
USB Press Kits	50
Meetings with Media, Trade Professionals	50



Entrance to Internationale Tourismusbörse Berlin, Germany

Canoecopia - Madison, Wisconsin - March 11 - 13, 2016

Booth Team: Russ McCallister, Tommy Thompson and Curt Blair

Canoecopia is the largest travel show in the country exclusively targeting paddling enthusiasts from Wisconsin as well as nearby states. Natural North Florida was one of only three Florida destinations present. Task Force booth staff again spoke to large crowds interested in Natural North Florida paddling opportunities. This show provided an opportunity for vendors to make two 45-minute presentations on paddling opportunities to interested attendees. The booth team took full advantage of the opportunity. Attendance totaled 216 for the two presentations. The booth team distributed 180 copies of the Suwannee River Wilderness Trail Guide to interested show attendees. Curt Blair from RiverWay South joined the booth team as an observer.

Booth representatives spoke with Scott MacGregor, publisher of Rapid Media (Kayak Angler Magazine, Paddling Magazine, and Adventure Kayak Magazine). Continued contact may result in an article in one of these publications. The event is anticipated to result in a Florida Sportsman Magazine feature/destination story about fishing in Dixie County in the fall.

As noted by one Task Force booth member, "Canoecopia attracts what I consider to be the perfect visitor to Natural North Florida. They're educated, avid outdoors-people, well traveled and affluent. Many have visited our area, but a surprising number have traveled through without stopping. Our interactions and presentations likely influenced travel to Natural North

Florida.”

Madison, Wisconsin does not appear as a feeder market in American Express Destination Insights 2014 credit card usage data. Additionally, It is not ranked by Google Analytics in the top 39 metropolitan areas for out-of-state metropolitan area Task Force website users, 2011- 2015. Nevertheless, the show is one of the top shows attended by the Task Force in terms of visitor interest. Canoeecopia attendees appear to have exhibited the highest open rate (40.2%) and highest click-thru rate (6.5%) of any travel show for the Task Force’s first newsletter.

Table 13
Canoeecopia Statistics

Item	Amount
Total Attendance	20,000
Florida State Parks Guides (ran out)	600
Florida State Transportation/Road Maps (ran out)	400
North Central Florida Rural Area of Opportunity Brochures	600
Other Regional Brochures (ran out)	380
Emails Collected	105
USB Press Kits	0
Meetings with Media, Trade Professionals	0



Tommy Thompson Makes a Presentation at Canoeecopia

Philadelphia Travel and Adventure Show - March 19 - 20, 2016

Booth Team: Roland Loog, Dawn Taylor and Pam Fuqua

This was the second year for the Philadelphia Travel and Adventure Show. Attendance was up from approximately 10,000 last year to 11,231 in 2016. Interest in Natural North Florida among attendees was still high. Booth attendees noted that attendees were unaware of the location and attractions of the region and were willing to take time to talk. Booth attendees also noted that while the attendance was lower than most of the other shows, a higher percentage of show visitors stopped at the Task Force booth and engaged the booth staff for a longer period of time than at most of the larger shows. Pam Fuqua from RiverWay South joined the booth team as an observer.

Task Force booth representatives had extended discussions with Samantha Brown of the Travel Channel and Karl Alan Karl of www.worldrider.com, author of *Forks* and a contributor to CNN. Alan Karl expressed interest in developing a CNN feature on clamming in Taylor County. Samantha Brown also expressed interest in featuring the region in her work.

Philadelphia ranks 10th by Google Analytics for out-of-state metropolitan area Task Force website users, 2011- 2015. However, it is not ranked in the top 20 out-of-state feeder markets based on American Express Destination Insights 2014 credit card usage data.

Table 14
Philadelphia Travel and Adventure Show Statistics

Item	Amount
Total Attendance	11,231
Florida State Parks Guides (ran out)	300
Florida State Transportation/Road Maps	450
North Central Florida Rural Area of Opportunity Brochures	800
Other Regional Brochures	12
Emails Collected	210
USB Press Kits	25
Meetings with Media, Trade Professionals	25



Roland Loog and Dawn Taylor, Philadelphia

Summary

The Task Force booth team members consider Canoeecopia, Chicago RV & Camping Show, and the Toronto Outdoor Adventure Show as the top shows in terms of visitor interest. Booth members noted that the word “Florida” in the brand name helps to attract visitors to the booth. Additionally, the local knowledge of the Task Force booth staff has played an important role in engaging and informing booth visitors. Booth team staff also note that travel show attendees do not know where Visit Natural North Florida is located, think that the region’s recreational vehicle parks are filled in the winter, and are unaware of the attractions and amenities of the area.

The booth teams report that there is a noticeable difference in visitor engagement at a booth staffed by Task Force representatives compared to booths staffed by persons either unfamiliar with or uninterested in their product. Task Force booth teams remain enthusiastic, actively engage travel show attendees, and consistently outdraw other booths. By limiting Task Force member participation to no more than one or two shows per season, enthusiasm is retained and all Task Force member counties feel they are engaged in the entire Task Force marketing program.

Table 15 attempts to gauge market interest by reporting the total number of brochures distributed to visitors by show. The table includes ITB Berlin as well as the London World Travel Market; however both of these shows have very large number of attendees. Given the large number of visitors to these shows, the measure is not considered a valid identifier of market interest in the region for the London and Berlin shows. However, Table 15 suggests that there is significant interest in Natural North Florida at the Dallas Travel and Adventure show.

Table 15
Brochures Distributed per 100 Attendees, by Show

Rank	Show	Brochures
1	Dallas	27.2
2	Chicago RV & Camping	14.8
3	Philadelphia	13.9
4	Atlanta Camping & RV	13.8
5	Toronto Outdoor Adventure	12.2
6	Canoeecopia	9.9
7	Detroit	9.4
8	Washington, DC	7.3
9	New York Times	7.3
10	Atlanta Boat	6.1
11	ITB-Berlin	1.0
12	London Word Travel Market	0.7
	Average, less London & ITB-Berlin	12.8

Although booth team members report that Detroit attendees showed interest in the region comparable to the other shows, and that the interest identified by the booth team is confirmed by Table 15, it is recommended that the Detroit show be replaced due to logistical difficulties for booth teams attending the show.

Post- Consumer Show Marketing

Once again a Cedar Key Getaway package drawing was promoted at the travel shows for purposes of collecting email addresses. A total of 1,599 email addresses were collected. These email addresses were added to the email addresses collected last year as well as emails from the Undiscovered Florida 2015 and 2016 coop advertisements for a total of 3,656 email addresses. The Task Force prepared and distributed its first quarterly enewsletter in March 2016 to these email addresses.

Visit Natural **NORTH FLORIDA**

Experience New Adventures.

Explore Uncharted Territories.

Dive Into a Hidden Oasis.



Excerpt from First Visit Natural North Florida enewsletter.

As can be seen in Table 16, the spring 2016 Task Force enewsletter enjoyed above-average rates of engagement. The 2016 Canoecopia attendees appeared to have the highest rates of engagement with a 40.2 percent open rate and a 6.5 percent click rate.

Table 16
Mailchimp Analytics, Task Force Spring 2016 Enewsletter: Engagement

Email List	Number of Recipients	Successful Deliveries	Open Rate	Click Rate
Travel Show Attendees, less 2016 Canoecopia	2,935	2,467	24.7%	4.1%
2016 Canoecopia Attendees	106	92	40.2%	6.5%
Travel and Tourism Professionals	139	131	31.3%	3.8%
Visit Florida Co-op Ad Leads	476	432	19.4%	1.2%
Total	3,656	3,122	24.7%	3.7%
Industry Average (Travel & Transportation)	-	-	18.0%	1.8%

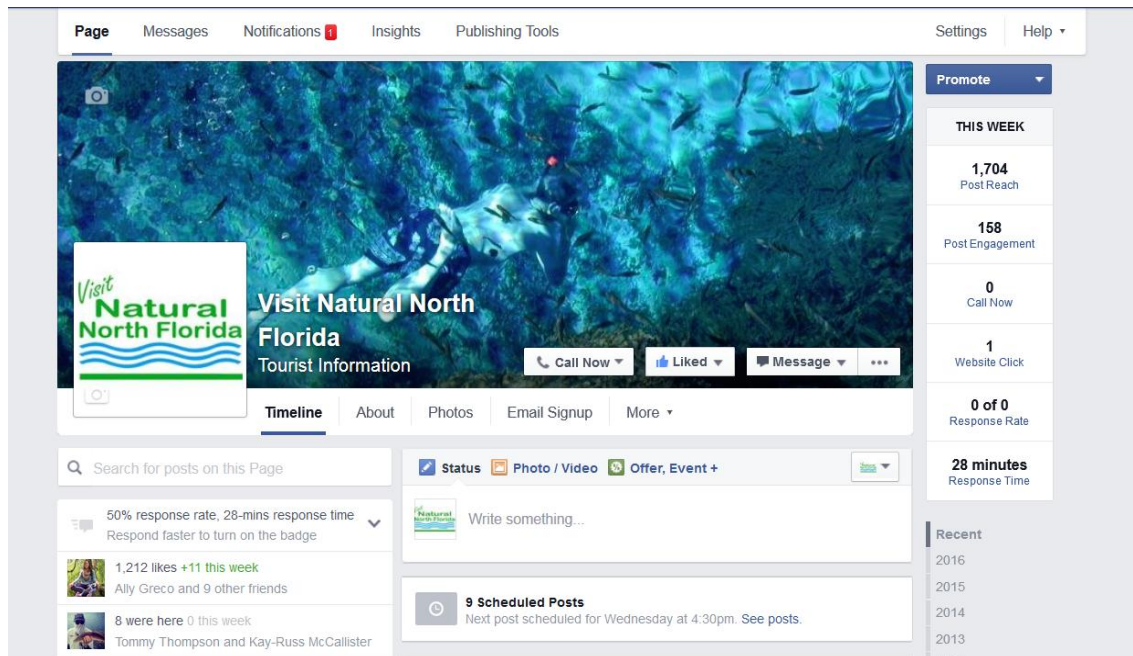
Table 17 reports the most frequented areas of the Task Force website visited by enewsletter subscribers. The table confirms booth team reports that travel show attendees do not know where Natural North Florida is located.

Table 17
Mailchimp Analytics, Task Force Spring 2016 Enewsletter:
Top Clicks to Website

Top Links Clicked	Number of Clicks	Percent of Total Clicks
Where Are We?	75	46.6%
Home Page	42	26.1%
Places to Stay	25	15.5%
Events	18	11.2%
Blogs	1	0.6%
Total	161	99.4%

Social Media - Facebook, Twitter, and Instagram

The Task Force maintains an active Facebook page. During the 2015-16 travel show season, the Task Force featured posts highlighting activities and tourism destinations within the region as well as notifications regarding Task Force appearances at travel shows. The Task Force also established Instagram and Twitter accounts and began to send Instagram messages as well as Tweets about Visit Natural North Florida. An excerpt from the Visit Natural North Florida Facebook page is shown below.



The Task Force is using its Facebook page to promote attractions and events in the area, as well as promoting appearances at travel shows. Two examples of such posts follow.


Visit Natural North Florida

Published by Ally Greco [?] · March 16 at 7:32am ·


We'll be at the #PhillyTravelShow this weekend promoting the awesome adventures in our area. Visit our booth inside the Pennsylvania Convention Center - Philadelphia, PA (Philly) to discover how to enjoy #NaturalNorthFlorida like a local.

<http://travelshows.com/shows/philadelphia/Travel and Adventure Show>




232 people reached
 [Boost Post](#)

Like Comment Share


Visit Natural North Florida

Published by Ally Greco [?] · March 30 at 8:52am ·


Happy #ManateeAppreciationDay! Did you know that hundreds of years ago, sailors used to mistake manatees for mermaids? Today you can spot them happily swimming in North Florida springs - like this little guy in Manatee Springs State Park! Photo by Sarah Hennies.



814 people reached
 [Boost Post](#)

Like Comment Share

You, Andrea Fredericks, Dwayne Mundy and 4 others

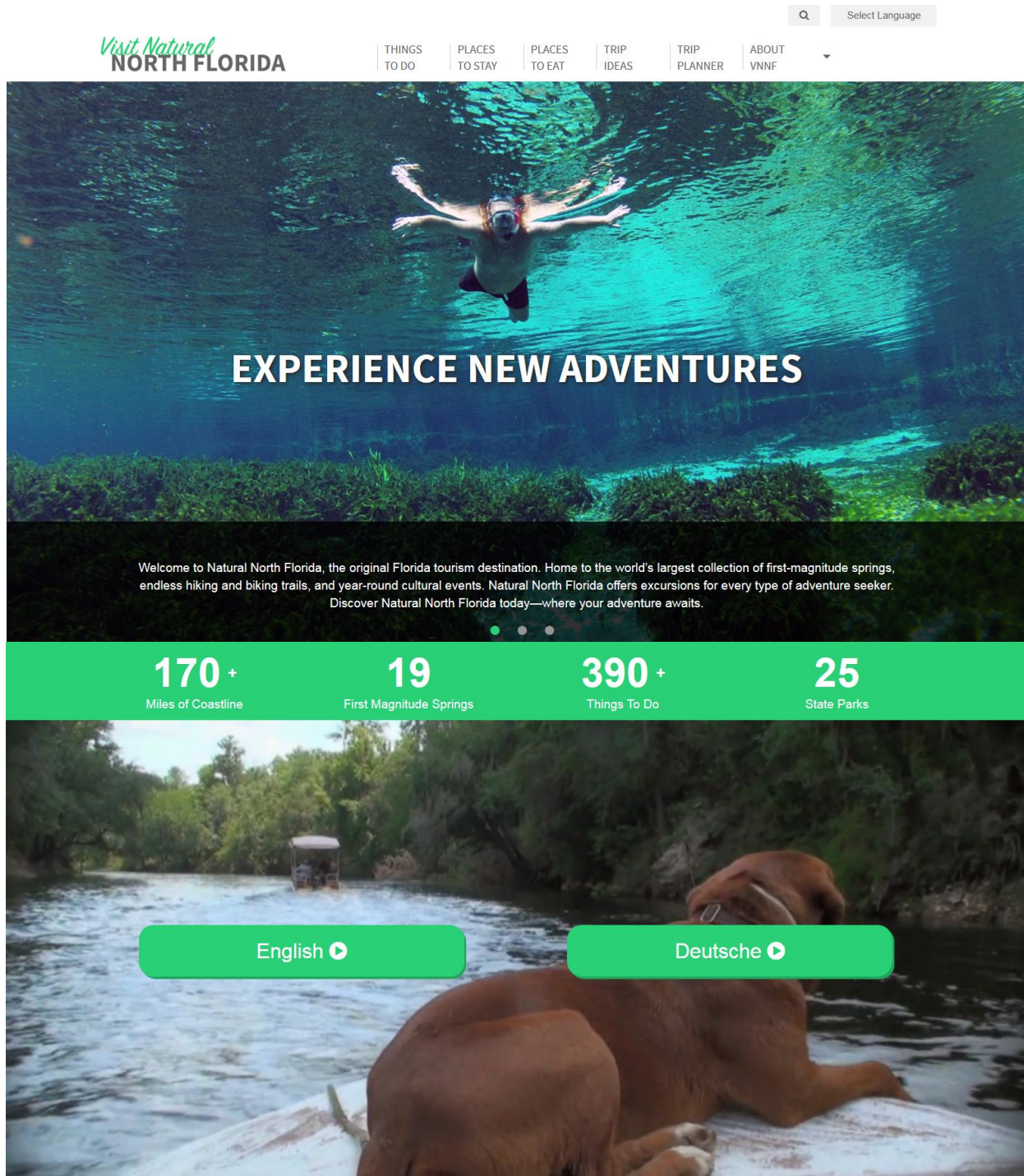

 Write a comment...

The Task Force is also using Instagram and Twitter to direct traffic to the Task Force website. Two example messages are posted below.



Revamped Task Force Website

In 2016 the Task Force revamped its website. Among other features, the revamped website is demand responsive so as to be viewable on multiple platforms, contains Google translate to engage foreign users, provides better back-end controls for easier website updates and maintenance. An excerpt of the new website homepage is presented below.



North Florida Tourism Activity

Anecdotal Reports

Anecdotal reports suggest that north Florida is experiencing an increase in tourism activity during spring 2016. The owner of Suwannee River Rendezvous, in Lafayette County, reports a 30 percent year-over-year increase in business.

Bradford County notes a significant increase in attendees at their 2016 Strawberry Festival compared to last year. "...every vendor we had back said they did more (business) on Saturday than they did all weekend last year. We sold out of Strawberries by Sunday afternoon. There were none left in the fields. Record crowds."

A new recreational vehicle park opened in Columbia County in 2016.

Dixie County reports sighting visitors from the Atlanta Camping & RV Show, who stayed 3 nights at Suwannee River Hideaway, and went paddling. They also visited Cedar Key. Dixie County also notes that the Anderson River Camp recreational vehicle campground, in Suwannee, has almost doubled their occupancy rates from last year and that the Yellow Jacket RV Resort has also seen an increase. Dixie County also notes that visitors were sighted who attended the 2015 Canoecopia as well as visitors who saw the Task Force booth at this year's Canoecopia.

Gilchrist County notes an extension of recreational vehicle campers into the spring and fall shoulder seasons.

A recreational vehicle park in Lafayette County is expanding in 2016.

Levy County reports that they are experiencing their best year ever, are seeing increases in bed tax revenues every month compared to last year, and in February, Cedar Key had the highest occupancy rate they have experienced in many years. One recreational vehicle campground near Cedar Key added 85 sites and a 450-unit recreational vehicle campground planned to be built in Chiefland. Finally, Levy County notes that they are experiencing an increase in German and Swedish visitors to the Blue Grotto and Devil's Den in Williston.

Taylor County reports a recent 30 percent increase in bed tax revenues and notes the presence of more event and festival attendees from northern states (New Jersey, New York, Michigan, Pennsylvania and Ohio) at its events. "Our area is promoted more than ever before, and there is no other reason why the rates would suddenly start to increase."

In 2014, The Original Florida Tourism Task Force office received virtually no visitor inquiries. In 2016, visitor inquiries are averaging one per day. A young woman from Belgium recently visited the Task Force office requesting information on nearby springs.

Quantitative Reports

Table 18 reports Tourism Development Tax Revenues for Natural North Florida counties for Fiscal Years 2013-14 and 2014-15. The table compares pre-travel show (Fiscal Year 2013-14) county revenues to revenues collected during the first year (Fiscal Year 2013-14) of the Rural Area of Opportunity program. As can be seen, Natural North Florida tax revenues increased by 8.9 percent between Fiscal Year 2013-14 and Fiscal Year 2014-15. When Alachua County is removed from consideration, the remainder of the region experienced a 9.9 percent increase in tax revenue over this period. Dixie, Gilchrist, Suwannee and Wakulla Counties experienced rates of increase in excess of the statewide average percentage increase of 12.6 percent. At the same time, Hamilton, Jefferson and Taylor Counties experienced slight declines in Tourism Development Tax revenues.

Table 18
Natural North Florida Tourism Development Tax Revenues
Fiscal Years 2013-14 and 2014-15

County	Fiscal Year 2014	Fiscal Year 2015	Difference	Percentage Change
Alachua	\$3,904,498	\$4,225,711	\$321,212	8.2%
Baker	\$29,421	\$32,510	\$3,089	10.5%
Bradford	\$89,297	\$100,026	\$10,729	12.0%
Columbia	\$913,440	\$987,326	\$73,885	8.1%
Dixie	\$23,879	\$29,751	\$5,872	24.6%
Gilchrist	\$29,461	\$39,898	\$10,436	35.4%
Hamilton	\$30,462	\$30,296	-\$166	-0.5%
Jefferson	\$30,473	\$30,205	-\$268	-0.9%
Lafayette	\$0	\$0	\$0	0.0%
Levy	\$169,100	\$189,174	\$20,075	11.9%
Madison	\$102,347	\$115,272	\$12,924	12.6%
Putnam	\$278,685	\$312,944	\$34,259	12.3%
Suwannee	\$193,133	\$219,495	\$26,362	13.6%
Taylor	\$231,205	\$229,088	-\$2,117	-0.9%
Union	\$0	\$0	\$0	0.0%
Wakulla	\$112,838	\$139,948	\$27,110	24.0%
Total	\$6,138,239	\$6,681,642	\$543,403	8.9%
w/o Alachua County	\$2,233,741	\$2,455,932	\$222,191	9.9%
State	\$662,536,505	\$746,013,814	\$83,477,309	12.6%

Source: Florida Department of Revenue, accessed April 28, 2016

http://dor.myflorida.com/taxes/pages/colls_from_7_2003.aspx

Table 19 examines Tourism Development Tax revenues between October and February of Fiscal Years 2014-15 and 2015-16 to provide data on this season's travel show program. Partial Fiscal Year 2015-16 data suggests an even greater increase in Tourism Development Tax revenues than in year one of the Partnership. Between July 2015 and February 2016, Visit Natural North Florida Tourism Development Tax Revenues increase by 15.9 percent compared to the same period last Fiscal Year. When Alachua County is removed, the remaining region experienced a 14.3 percent increase. Statewide Tourism Development Tax revenues increased by 10.0 percent during this period.

Table 19
Natural North Florida Tourism Development Tax Revenues
July through February of Fiscal Years 2014-15 and 2015-16

County	Fiscal Year 2014-15	Fiscal Year 2015-16	Difference	Percentage Change
Alachua	\$2,324,784	\$2,716,984	\$392,200	16.9%
Baker	\$15,206	\$16,938	\$1,732	11.4%
Bradford	\$61,640	\$69,056	\$7,415	12.0%
Columbia	\$622,939	\$776,569	\$153,630	24.7%
Dixie	\$18,297	\$24,462	\$6,165	33.7%
Gilchrist	\$24,786	\$23,611	-\$1,175	-4.7%
Hamilton	\$15,174	\$16,369	\$1,195	7.9%
Jefferson	\$20,285	\$21,354	\$1,069	5.3%
Lafayette	\$0	\$0	\$0	0.0%
Levy	\$108,055	\$122,824	\$14,769	13.7%
Madison	\$73,219	\$67,299	-\$5,920	-8.1%
Putnam	\$106,631	\$107,583	\$952	0.9%
Suwannee	\$87,504	\$95,962	\$8,458	9.7%
Taylor	\$129,360	\$133,677	\$8,458	3.3%
Union	\$0	\$0	\$0	0.0%
Wakulla	\$91,406	\$95,045	\$3,639	4.0%
Total	\$3,699,286	\$4,287,731	\$592,586	15.9%
w/o Alachua County	\$1,374,502	\$1,570,747	\$196,246	14.3%
State	\$272,048,715	\$299,233,233	\$27,184,518	10.0%

Source: Florida Department of Revenue, accessed April 28, 2016

http://dor.myflorida.com/taxes/pages/colls_from_7_2003.aspx

Other Positive Results

Task Force membership increase by two counties in 2015 with the addition of Bradford and Columbia Counties. In 2016 the Task Force is recruiting Hamilton and Suwannee counties to rejoin. As part of the recruitment effort, the Task Force revised its dues structure, thereby reducing Hamilton County annual dues from \$2,000 to \$1,000. Several Hamilton County officials have expressed interest in rejoining since revising the dues structure. Suwannee County experienced a change in leadership at the County Chamber of Commerce where its Executive Director left to take another position. As a result, efforts to recruit Suwannee County have been placed on hold until the new executive director has time to adjust to his new position.

In 2015, the Task Force used the VISIT FLORIDA Rural Areas of Opportunity Partnership funds as part of its match for a \$150,000 Regional Rural Development Grant administered by the Florida Department of Economic Opportunity. These funds were used to revamp the Visit Natural North Florida website; design and distribute brochures along interstate highways in Florida and Georgia; provide scholarships for Task Force members to attend the Annual Florida Governor's Tourism Conference and the Southeast Tourism Society Marketing College, advertise on the Florida State Parks Pocket Ranger cell phone app, attend the VISIT FLORIDA New York City media luncheon, develop a regionwide bicycle route map, and to develop a five-year strategic marketing plan.

In 2016, the Task Force successfully applied for a \$150,000 Regional Rural Development Grant using VISIT FLORIDA Rural Areas of Opportunity Partnership funds as part of its match. The Task Force is using these funds to create an online interactive "Ultimate Bicycle Guide" as well as an "Ultimate Springs Guide." The Task Force is also purchasing a full-page advertisement in UnDiscovered Florida, contract with a professional outdoor writer to produce blogs for the website, conduct a digital advertising campaign to drive traffic to the website site, distribute brochures along interstate highways in Florida and Georgia, provide scholarships to the Florida Governor's Conference and the Southeast Tourism Society Marketing College, and to develop and distribute a quarterly enewsletter.

Google Analytics

Google Analytics for the Visit Natural North Florida website (www.vnnf.org) indicate a total of 72,380 users accessed the website during calendar year 2015. This represents a decline from 75,143 users in 2014. Review of Google Analytics indicates significant changes from year to year with regards to top geographic areas by country, state, and region. Therefore, 20 through 22 report top geographies of interest for the 5-year period between 2011 and 2015.

Of these, 71,411, or 95 percent of all users, were from the United States as indicated in Table 20, below. The top five foreign countries between 2011 and 2015 were Canada, Brazil, United Kingdom, Germany and India. Although Brazil was the second-ranked foreign country of origin, its high bounce rate of 88.9 percent suggests that Brazilian users are unlikely visitors to the Natural North Florida area.

Finally, the table shows a significant increase in mobile users between 2011 and 2015. In 2011, mobile users constituted 8.5 percent of website traffic. By 2015, the percentage of mobile users increased to 51.9 percent. Since mobile users are identified by the location at which they access the website, inquiries from foreigners may be under-reported. When foreign visitors access the website while in the United States, Google Analytics identifies them as located within the United States.

Table 20
Visit Natural North Florida Website Usage by Top Ten Countries
Calendar Years 2011-2015

Rank	2011		2012		2013		2014		2015		2011 - 2015	
	Country	Users	Country	Users	Country	Users	Country	Users	Country	Users	Country	Users
1	United States	34,021	United States	45,404	United States	66,829	United States	71,411	United States	69,295	United States	284,970
2	Canada	433	Canada	563	Canada	416	Brazil	590	Brazil	554	Canada	2,125
3	United Kingdom	344	United Kingdom	408	United Kingdom	326	Canada	473	Germany	319	United Kingdom	1,667
4	India	160	India	193	Germany	207	United Kingdom	369	Canada	271	Brazil	1,463
5	Brazil	114	Germany	177	India	152	Germany	254	United Kingdom	222	Germany	1,047
6	Philippines	101	Brazil	125	Japan	89	India	231	India	199	India	977
7	Germany	100	Philippines	125	France	86	France	106	Italy	131	France	458
8	France	82	Turkey	121	Brazil	78	Italy	92	France	113	Philippines	453
9	Turkey	77	Italy	86	Philippines	64	Philippines	67	Philippines	88	Italy	394
10	Netherlands	76	Australia	80	Australia	54	Netherlands	64	Russia	58	Netherlands	339
	Total	35,508		47,282		68,301		73,657		71,250		293,893
	Percent Domestic	94.3%	Percent Domestic	94.6%	Percent Domestic	97.2%	Percent Domestic	96.2%	Percent Domestic	96.5%	Percent Domestic	96.1%
	Percent International	5.7%	Percent International	5.4%	Percent International	2.8%	Percent International	3.8%	Percent International	3.5%	Percent International	3.9%
	Pct. Mobile Devices	8.5%	Pct. Mobile Devices	16.3%	Pct. Mobile Devices	33.6%	Pct. Mobile Devices	43.3%	Pct. Mobile Devices	51.9%	Pct. Mobile Devices	34.8%

Source: Compiled by The Original Florida Tourism Task Force, March 10, 2016.

Note: **bolded** countries are those countries where the Task Force exhibited at travel shows during the 2015-16 travel show season.

Table 21 portrays website users by the top 25 states for the five-year period of 2011 through 2015. The top five states, excluding Florida, for this time period were Georgia, New York, California, Texas and North Carolina. Google data also includes states of foreign nations. Therefore the “states” of England and Ontario, Canada are also listed in the top 25 states. All states where travel shows attended by the Task Force were located, except Berlin, Germany appear in the top 25 list (Berlin ranked 70th). Although not listed in Table 21, the German states of North Rhine-Westphalia (Dusseldorf, ranked 44th) and Bavaria (Munich, ranked 47th) are listed in the top 50 states for the 2013 - 2015 time period.

Table 21 displays the same data regarding mobile users as Table 20. As can be seen, the percentage of out-of-state website users has declined over time while at the same time the absolute number of in-state users and the percentage of mobile users increased. The data suggests that the number of out-of-state users may be under-reported as they are identified as located within Florida by Google Analytics when accessing the website while on vacation in Florida.

Table 21
Visit Natural North Florida Website Usage by Top 25 States
Calendar Years 2011 - 2015

	2011		2012		2013		2014		2015		2011 - 2015	
Rank	State	Users	State	Users	State	Users	State	Users	State	Users	State	Users
1	Florida	20,644	Florida	27,670	Florida	43,620	Florida	52,127	Florida	52,510	Florida	195,178
2	Georgia	2,761	Georgia	3,672	Georgia	4,464	Georgia	4,683	Georgia	3,908	Georgia	19,471
3	New York	1,052	Maryland	1,097	California	2,320	New York	1,217	Texas	1,177	New York	5,878
4	California	989	New York	1,040	New York	1,670	Texas	1,119	South Carolina	962	California	5,823
5	Texas	756	California	936	Texas	1,098	North Carolina	991	Alabama	944	Texas	5,060
6	North Carolina	523	Texas	888	Maryland	918	Alabama	962	North Carolina	869	North Carolina	4,198
7	Ohio	503	North Carolina	822	North Carolina	896	California	862	New York	846	Alabama	3,413
8	Illinois	469	Pennsylvania	704	Tennessee	847	Michigan	768	Colorado	840	Tennessee	3,155
9	Virginia	440	Virginia	634	Alabama	660	Tennessee	653	Tennessee	764	Maryland	3,126
10	Pennsylvania	436	Ohio	630	Illinois	626	Illinois	623	California	656	Illinois	2,819
11	Alabama	372	Tennessee	563	Virginia	589	Virginia	591	Illinois	515	Virginia	2,740
12	Tennessee	365	Illinois	505	New Jersey	570	Pennsylvania	576	Pennsylvania	427	Pennsylvania	2,579
13	Michigan	333	Alabama	430	Colorado	495	Ohio	524	Ohio	424	South Carolina	2,554
14	Maryland	320	Michigan	404	Michigan	468	South Carolina	493	Virginia	416	Ohio	2,534
15	New Jersey	308	South Carolina	396	Massachusetts	465	New Jersey	387	Maryland	412	Michigan	2,289
16	England	298	Kentucky	377	Pennsylvania	443	Colorado	380	Missouri	411	Colorado	2,031
17	South Carolina	263	England	357	Ohio	441	Kentucky	368	Michigan	325	New Jersey	1,848
18	Massachusetts	256	Ontario	341	South Carolina	392	Maryland	360	Louisiana	243	Massachusetts	1,494
19	District of Columbia	235	Washington	316	Kentucky	368	Wisconsin	347	New Jersey	242	Missouri	1,477
20	Ontario	231	New Jersey	311	Missouri	302	Louisiana	320	Kentucky	220	Kentucky	1,473
21	Minnesota	223	Massachusetts	284	England	283	England	319	Massachusetts	208	England	1,462
22	Wisconsin	202	Minnesota	236	Minnesota	258	Massachusetts	304	England	187	Ontario	1,228
23	Missouri	196	Louisiana	232	Nebraska	258	Missouri	303	State of Sao Paulo	173	Louisiana	1,214
24	Indiana	194	Missouri	221	Louisiana	254	Indiana	300	Indiana	171	Wisconsin	1,137
25	Washington	172	Indiana	218	Indiana	248	Ontario	256	Wisconsin	171	Indiana	1,127
	Total	32,541		43,284		62,953		69,833		68,021		275,308
	Percent Florida	60.0%	Percent Florida	61.0%	Percent Florida	66.7%	Percent Florida	72.1%	Percent Florida	74.9%	Percent Florida	68.1%
	Percent Out-of-State	40.0%	Percent Out-of-State	39.0%	Percent Out-of-State	33.3%	Percent Out-of-State	27.9%	Percent Out-of-State	25.1%	Percent Out-of-State	31.9%
	Pct. Mobile Devices	8.5%	Pct. Mobile Devices	16.3%	Pct. Mobile Devices	33.6%	Pct. Mobile Devices	43.3%	Pct. Mobile Devices	51.9%	Pct. Mobile Devices	34.8%

Note: **bolded** states are those states where the Task Force exhibited at travel shows during the 2015-16 travel show season.

Table 22 reports website users by the top 40 out-of-state metropolitan areas for the 2011 - 2015 time period. Annual rankings of the top metropolitan areas change significantly from year-to-year. However, for the five year period, the top five out-of-state metropolitan areas are Atlanta, Georgia; New York, New York; Washington, DC, Los Angeles, California and Chicago, Illinois. London, England is ranked 33rd among metropolitan areas. Every metropolitan area in which the Task Force exhibited at a Travel Show, with the exceptions of Madison, Wisconsin and Berlin, Germany (which is classified as a state by Google Analytics), are ranked in the top 40 metropolitan areas for this time period.

Table 22
Visit Natural North Florida Website Usage by Top 40
Out-of-State Metropolitan Areas, 2011 - 2015

Rank	2011 Metropolitan Area	Users	2012 Metropolitan Area	Users	2013 Metropolitan Area	Users	2014 Metropolitan Area	Users	2015 Metropolitan Area	Users	2011 - 2015 Metropolitan Area	Users
1	Atlanta GA	1,605	Atlanta GA	2,143	New York NY	2,716	Atlanta GA	2,551	Atlanta GA	1,960	Atlanta GA	10,651
2	New York NY	1,124	Washington DC (Hagersto	1,437	Atlanta GA	2,535	New York NY	1,319	New York NY	796	New York NY	7,128
3	Washington DC (Hagersto	620	New York NY	1,121	Los Angeles CA	1,704	Washington DC (Hagersto	630	Denver CO	778	Washington DC (Hagerstown MD)	4,416
4	Los Angeles CA	477	Albany GA	449	Washington DC (Hagersto	1,235	Chicago IL	507	Charlotte NC	583	Los Angeles CA	3,176
5	Chicago IL	358	Philadelphia PA	408	Nashville TN	594	Charlotte NC	487	Houston TX	565	Chicago IL	2,181
6	Philadelphia PA	289	Los Angeles CA	404	Albany GA	497	Albany GA	474	Nashville TN	521	Albany GA	2,101
7	Cleveland-Akron (Canton)	281	Chicago IL	397	Dallas-Ft. Worth TX	491	Philadelphia PA	395	Florence-Myrtle Beach SC	520	Charlotte NC	2,019
8	Boston MA-Manchester N	262	Cleveland-Akron (Canton)	379	Chicago IL	478	Nashville TN	370	Birmingham AL	483	Nashville TN	2,006
9	San Francisco-Oakland-Sai	257	Nashville TN	346	Boston MA-Manchester N	475	Flint-Saginaw-Bay City MI	367	Washington DC (Hagersto	480	Denver CO	1,740
10	Albany GA	222	Charlotte NC	330	Charlotte NC	388	Los Angeles CA	330	Albany GA	467	Philadelphia PA	1,662
11	Dallas-Ft. Worth TX	212	Seattle-Tacoma WA	290	Denver CO	376	Birmingham AL	328	Chicago IL	413	Boston MA-Manchester NH	1,552
12	Nashville TN	211	Boston MA-Manchester N	289	Philadelphia PA	332	Denver CO	328	Baltimore MD	310	Dallas-Ft. Worth TX	1,545
13	Macon GA	207	Louisville KY	285	San Francisco-Oakland-Sai	301	Macon GA	314	Macon GA	287	Houston TX	1,475
14	Raleigh-Durham (Fayettevi	201	San Francisco-Oakland-Sai	259	Savannah GA	262	Boston MA-Manchester N	311	Dallas-Ft. Worth TX	284	Birmingham AL	1,312
15	Savannah GA	185	Raleigh-Durham (Fayettevi	241	Macon GA	254	Dallas-Ft. Worth TX	308	Philadelphia PA	258	San Francisco-Oakland-San Jose CA	1,309
16	Minneapolis-St. Paul MN	185	Wilkes Barre-Scranton PA	237	Raleigh-Durham (Fayettevi	247	Savannah GA	281	Los Angeles CA	249	Macon GA	1,236
17	Houston TX	179	Dallas-Ft. Worth TX	232	Louisville KY	243	San Francisco-Oakland-Sai	279	Boston MA-Manchester N	237	Savannah GA	1,214
18	Charlotte NC	168	Houston TX	228	Greenville-Spartanburg SC	243	Houston TX	275	Savannah GA	234	Raleigh-Durham (Fayetteville) NC	1,112
19	Detroit MI	165	Greenville-Spartanburg SC	221	Houston TX	240	Huntsville-Decatur (Floren	258	Springfield MO	217	Cleveland-Akron (Canton) OH	1,051
20	Baltimore MD	153	Savannah GA	220	Lincoln & Hastings-Kearne	234	Detroit MI	257	Raleigh-Durham (Fayettevi	208	Baltimore MD	1,043
21	Seattle-Tacoma WA	142	Minneapolis-St. Paul MN	218	Minneapolis-St. Paul MN	219	Greenville-Spartanburg SC	237	San Francisco-Oakland-Sai	190	Greenville-Spartanburg SC-Asheville NC	1,018
22	Denver CO	141	Detroit MI	198	Birmingham AL	206	Waco-Temple-Bryan TX	220	Greenville-Spartanburg SC	179	Detroit MI	980
23	Birmingham AL	133	Baltimore MD	184	Detroit MI	195	Raleigh-Durham (Fayettev	210	Detroit MI	176	Minneapolis-St. Paul MN	964
24	London	127	San Antonio TX	154	St. Louis MO	183	St. Louis MO	206	New Orleans LA	168	Seattle-Tacoma WA	896
25	Greenville-Spartanburg SC	121	Macon GA	147	Baltimore MD	166	Baltimore MD	204	Seattle-Tacoma WA	144	Louisville KY	795
26	St. Louis MO	112	London	139	New Orleans LA	162	Minneapolis-St. Paul MN	197	Minneapolis-St. Paul MN	140	St. Louis MO	781
27	Portland OR	98	St. Louis MO	135	Dothan AL	147	Augusta GA	183	Montgomery (Selma) AL	137	Florence-Myrtle Beach SC	732
28	Columbus OH	97	Denver CO	127	San Antonio TX	142	New Orleans LA	173	Columbus OH	135	New Orleans LA	699
29	Norfolk-Portsmouth-Newj	95	Birmingham AL	125	Phoenix AZ	139	Cleveland-Akron (Canton)	156	San Antonio TX	121	Columbus OH	613
30	Salt Lake City UT	95	New Orleans LA	123	Cleveland-Akron (Canton)	133	Bowling Green KY	154	Cincinnati OH	117	San Antonio TX	607
31	Abilene-Sweetwater TX	93	Phoenix AZ	117	Kansas City MO	111	Seattle-Tacoma WA	150	St. Louis MO	115	Flint-Saginaw-Bay City MI	565
32	Phoenix AZ	92	Norfolk-Portsmouth-Newj	114	Columbus OH	122	Indianapolis IN	149	San Diego CA	107	Huntsville-Decatur (Florence) AL	541
33	Indianapolis IN	91	Hartford & New Haven CT	113	Seattle-Tacoma WA	122	Columbus OH	137	Cleveland-Akron (Canton)	100	London	535
34	Austin TX	91	Columbus OH	110	San Diego CA	122	Dothan AL	137	Chattanooga TN	100	Indianapolis IN	519
35	Pittsburgh PA	90	Indianapolis IN	100	Flint-Saginaw-Bay City MI	120	Cincinnati OH	126	Louisville KY	99	Cincinnati OH	502
36	Cincinnati OH	87	Knoxville TN	100	Cincinnati OH	115	Pittsburgh PA	123	Albany-Schenectady-Troy	97	Norfolk-Portsmouth-Newport News V	502
37	Kansas City MO	86	Portland OR	100	Knoxville TN	113	Louisville KY	123	Dothan AL	96	Dothan AL	500
38	Grand Rapids-Kalamazoo-I	85	Columbia SC	99	London	112	Milwaukee WI	123	Hartford & New Haven CT	93	Kansas City MO	492
39	San Diego CA	85	Richmond-Petersburg VA	99	Austin TX	111	Chattanooga TN	118	Huntsville-Decatur (Floren	93	Austin TX	492
40	New Orleans LA	78	Salt Lake City UT	97	Norfolk-Portsmouth-Newj	109	Knoxville TN	117	Kansas City MO	90	Phoenix AX	488
	Total			12,515		16,714		13,612		12,347		63,150

Note: **bolded** metropolitan areas are those areas where the Task Force exhibited at travel shows during the 2015-16 travel show season.

Table 23 reports Task Force website users by location between January 1 and April 26, 2016. Perhaps the most surprising information in the table is the sudden emergence of Russia and China in the top five countries of origin for Task Force website users. Several Russian states; Moscow, Moscow Oblast, Saint Petersburg, Voronezh Oblast, and the Republic of Bashkortostan appear in the top 40 states. The Chinese states of Beijing and Shandong also appear. None of these states appeared in the top 40 states for the 2011 - 2015 time period.

Table 23
Visit Natural North Florida Website Usage by Top 40
Countries, States and Out-of-State Metropolitan Areas,
January 1 - April 26, 2016

Rank	Countries	States	Non-Florida Metropolitan Areas
1	United States	Florida	Atlanta GA
2	Russia	Georgia	New York NY
3	United Kingdom	Texas	Houston TX
4	Germany	New York	Washington DC (Hagerstown MD)
5	China	Alabama	Chicago IL
6	Canada	North Carolina	Birmingham AL
7	Brazil	Illinois	Albany GA
8	India	Virginia	Nashville TN
9	France	Ohio	Denver CO
10	Kyrgyzstan	Tennessee	Boston MA-Manchester NH
11	South Korea	California	Philadelphia PA
12	Netherlands	Pennsylvania	Charlotte NC
13	Switzerland	Michigan	Dallas-Ft. Worth TX
14	Philippines	England	Savannah GA
15	Ukraine	Colorado	Detroit MI
16	Belgium	Moscow	Greenville-Spartanburg SC-Asheville NC-
17	Japan	Wisconsin	Los Angeles CA
18	Austria	New Jersey	Macon GA
19	Australia	Massachusetts	Cleveland-Akron (Canton) OH
20	Cyprus	Moscow Oblast	San Francisco-Oakland-San Jose CA
21	Spain	Indiana	Raleigh-Durham (Fayetteville) NC
22	Mexico	South Carolina	Columbus OH
23	Italy	Kentucky	London
24	Puerto Rico	Beijing	Indianapolis IN
25	Sweden	District of Columbia	Milwaukee WI
26	Taiwan	Missouri	Hartford & New Haven CT
27	United Arab Emirates	Saint Petersburg	Portland OR
28	Denmark	Maryland	Pittsburgh PA
29	Iran	Ontario	Minneapolis-St. Paul MN
30	Oman	Connecticut	Baltimore MD
31	Slovakia	Mississippi	Dothan AL
32	Bahamas	Louisiana	Cincinnati OH
33	Colombia	Minnesota	St. Louis MO
34	Croatia	Voronezh Oblast	New Orleans LA
35	Hungary	Arizona	Austin TX
36	Israel	Oregon	Phoenix AZ
37	Kazakhstan	Arkansas	Lexington KY
38	Malaysia	Republic of Bashkortostan	Grand Rapids-Kalamazoo-Battle Creek MI
39	Pakistan	Shandong	Seattle-Tacoma WA
40	Portugal	Bavaria	Columbus GA

Source: Compiled by The Original Florida Tourism Task Force, April 27, 2016.

Note: **bolded** locations are those locations where the Task Force exhibited at travel shows during the 2015-16 travel show season

Recommendations

Given the positive feedback from booth staff and the increase in year-over-year bed tax for the last two years, it is recommended that the Task Force continue the travel show program and increase the number of travel shows for the 2016-17 travel show season. The Task Force, in consultation with RiverWay South, recommends a total of 16 travel shows; five of which will be combined shows with RiverWay South. It is further recommended that 13 of the shows be funded by the VISIT FLORIDA Rural Areas of Opportunity Partnership and that three of the shows be funded by the Task Force through its Regional Rural Development Grant. The recommended travel show schedule is presented in Table 24.

Table 24
Recommended VISIT FLORIDA - Visit Natural North Florida Travel Shows,
2016-17 Season*

Number	Show Name	Show Dates	Attendance
1	<i>Hershey RV Show</i>	<i>September 14 - 18, 2016</i>	<i>50,000 in 2015</i>
2	London World Travel Market	November 7 - 9, 2016	150,000 in 2016
3	<i>Minneapolis Outdoor Adventure Expo</i>	<i>November 18 - 20, 2016</i>	<i>6,000 - 8,000 in 2016</i>
4	Atlanta Boat Show	January 12 - 15, 2017	24,000 in 2016
5	Washington, DC Travel & Adventure Show	January 14 - 17, 2017	21,245 in 2016
6	Chicago Travel & Adventure Show	January 21 - 22, 2017	23,912 in 2016
7	New York Times Travel Show	January 27 - 29, 2017	29,061 in 2016
8	Atlanta Camping & RV Show	January 27 - 29, 2017	20,000 in 2016
9	Boston Globe Travel Show	February 10 - 12, 2017	20,000-plus in 2015
10	Telegraph Outdoor Adventure & Travel Show	February 16 - 19, 2017	50,271 in 2015
11	Chicago RV & Camping Show	February 17 - 21, 2016	23,912 in 2016
12	Toronto Outdoor Adventure Show	February 24 - 26, 2017	27,400 in 2016
13	ITB-Berlin	March 8 - 12, 2017	180,000 in 2016
14	Canoecopia	March 10 - 12, 2017	20,000 in 2016
15	Philadelphia Travel & Adventure Show	March 25 - 26, 2017	11,231 in 2016
16	<i>Dallas Travel & Adventure Show</i>	<i>April 1 - 2, 2017</i>	<i>11,231 in 2016</i>

**italicized* shows are shows funded by the Task Force Regional Rural Development Grant.

Bolded shows are combined RAO Partnership shows with RiverWay South.

All other shows are RAO Partnership shows attended solely by Visit Natural North Florida.

Although booth team members reported that Detroit attendees showed interested in the region comparable to the other shows, it is recommended that the Detroit show be replaced due to logistical difficulties. The Task Force will use some of its Regional Rural Development Grant funds to add the following two additional shows next travel season: the Hershey RV and Camping Show and, the Minneapolis (i.e., Midwest Mountaineering) Outdoor Adventure Expo. Additionally, the Task Force will use Regional Rural Development Grant to fund the Dallas Travel and Adventure Show. The combined effort will result in the Task Force attending 12 domestic out-of-state travel shows and four international travel shows.

The Task Force has noticed strong interest from outdoors-oriented shows such as Canoecon, the Toronto Outdoor Adventure Show as well as the domestic travel and adventure shows such as the Dallas Travel and Adventure Show. It is therefore recommended that a European outdoor adventure show be added to the 2016-17 travel show season. The Task Force identified three candidate European outdoor adventure shows. Specifically, the Task Force recommends the London Telegraph Outdoor Adventure & Travel Show be added because 1) the show is oriented to consumers interested in outdoor adventures such as hiking and paddling located all over the world; 2) no American exhibitors were present at last year's show; 3), Google Analytics suggest an interest in Natural North Florida in London; and 4) there is no language barrier.

Given the strong interest the Task Force has experienced at outdoor adventure travel shows, it is recommended that, consideration be given to adding two additional consumer-oriented European outdoor adventure shows in future years. Future additional European shows of interest include TourNatur, in Dusseldorf, Germany and F.Re.E. Messe Munchen, in Munich, Germany. TourNatur appears similar to Canoecon and the Toronto Outdoor Adventure Show while F.Re.E. Messe Munchen appears similar to the travel and adventure shows produced by Unicom (i.e., the Dallas, Philadelphia and Washington, DC Travel and Adventure Shows). North Rhine-Westphalia (Dusseldorf), and Munich (Bavaria) are the number one and two ranked German states, respectively, by Google Analytics (Berlin is the number three ranked German state). TourNatur is particularly interesting as it is a September show, which is an ideal time to market outdoor-oriented activities in Natural North Florida. Table 25 identifies the candidate European outdoor-adventure shows.

Table 25
Potential European Outdoor Adventure Shows

Show	Show Dates	Attendance
TourNatur - Dusseldorf, Germany	September 4 - 9, 2016	40,000 attendees in 2015
F.Re.E. Messe Munchen - Munich, Germany	February 22 - 26, 2017	122,000 attendees in 2016

The 16 shows recommended for the 2016-17 travel show season is approaching the limit of the operational capacity of the Task Force. The addition of two additional shows for the 2017-18 travel show season would bring the total number of travel shows attended by Visit Natural North Florida to 18, which may represent the maximum operational capacity of the Task Force.

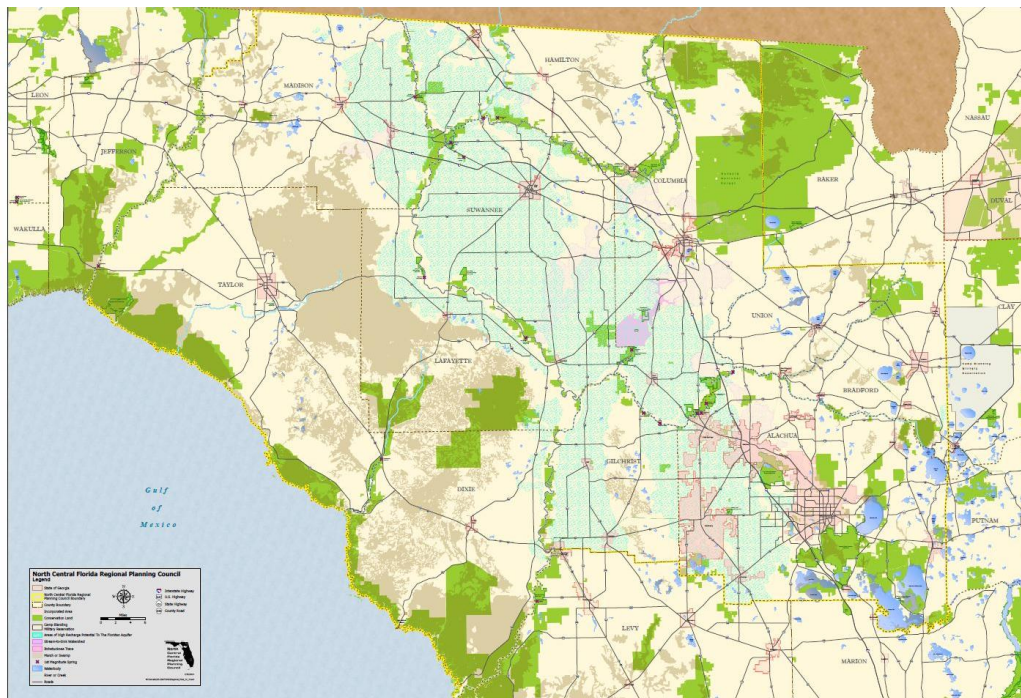
A significant number of additional domestic out-of-state travel shows are also appealing. However, assuming a maximum operational capacity of 18 shows per season, it may be advisable to put some shows on a two- or three-year rotation in order to reach as many domestic out-of-state markets as possible. Candidate travel shows are identified in Table 26 below.

Table 26
Potential Domestic Travel Shows for a Three-Year Rotation

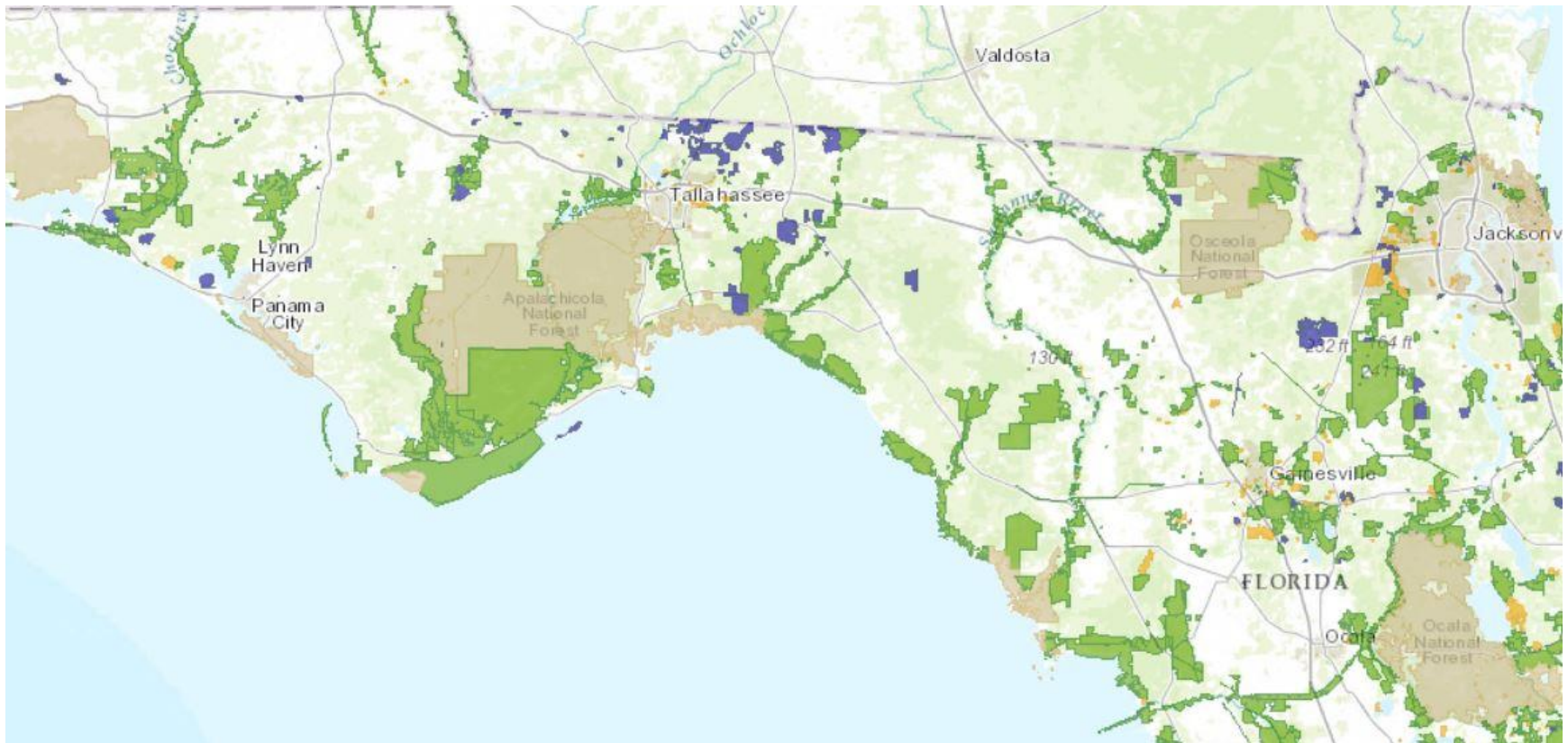
Show	Show Dates	Attendance
Detroit Camper and RV Show	October 5 - 9, 2016	25,600 attendees in 2016
Cincinnati Travel, Sports & Boat Show	January 13 - 15 & 18 - 22, 2017	55,000 attendees in 2016
Minneapolis Outdoor Expo, Spring	April 22 - 24, 2016	10,000 attendees in 2015
Minneapolis/St. Paul RV, Vacation & Camping Show	February 11 - 14, 2016	31,000 attendance in 2016
Houston RV Show	February 15 - 19, 2017	35,000 attendees in 2016
Milwaukee RV Show	February 25 - 28, 2016	12,500 attendees in 2016
Bike Expo New York	April 29 - 30, 2016	60,000 attendees in 2015

RiverWay South Combined Shows

With regards to the combined shows with Riverway South, it is recommended that double booths be rented so that each organization can have its own table. The Task Force is concerned that a single table cannot provide sufficient horizontal space for the display of both organization's brochures. It is further recommended that two representatives from each organization attend the combined shows in order to assure adequate staffing due to amount of visitor traffic, the long hours of the Chicago RV & Camping Show, and the need for two people to staff Canoeopia presentations. Additionally, it is recommended that large (4' x 6') display maps be created of each region highlighting conservation lands. The two maps could be placed next to each other at the combined shows to display the entire two-region area. The striking amount of conservation lands on the maps would help draw travel show visitors to the booths, help travel show visitors recognize the locations of the two areas, and help to unify the presentation of the two regions. Example maps for Visit Natural North Florida as well as the combined areas follow.



Example Display Map of Visit Natural North Florida



Example Display Map Combining Visit Natural North Florida and RiverWay South

Additional Recommendations

In order to better understand the Visit Natural North Florida market, it is recommended that the Task Force purchase a one-year subscription to VisaVues domestic and international editions through VISIT FLORIDA with its Fiscal Year 2016-17 Regional Rural Development Grant.

Finally, it is also recommended that the VISIT FLORIDA advance payment to the Task Force be increased from \$25,000 to \$50,000. The cost-reimbursable nature of the Partnership has placed a significant strain on the available working capital of the Task Force. Increasing the deposit from \$25,000 to \$50,000 will help alleviate potential cash flow challenges and reduce the likelihood of the Task Force requesting reimbursements during the travel show season.