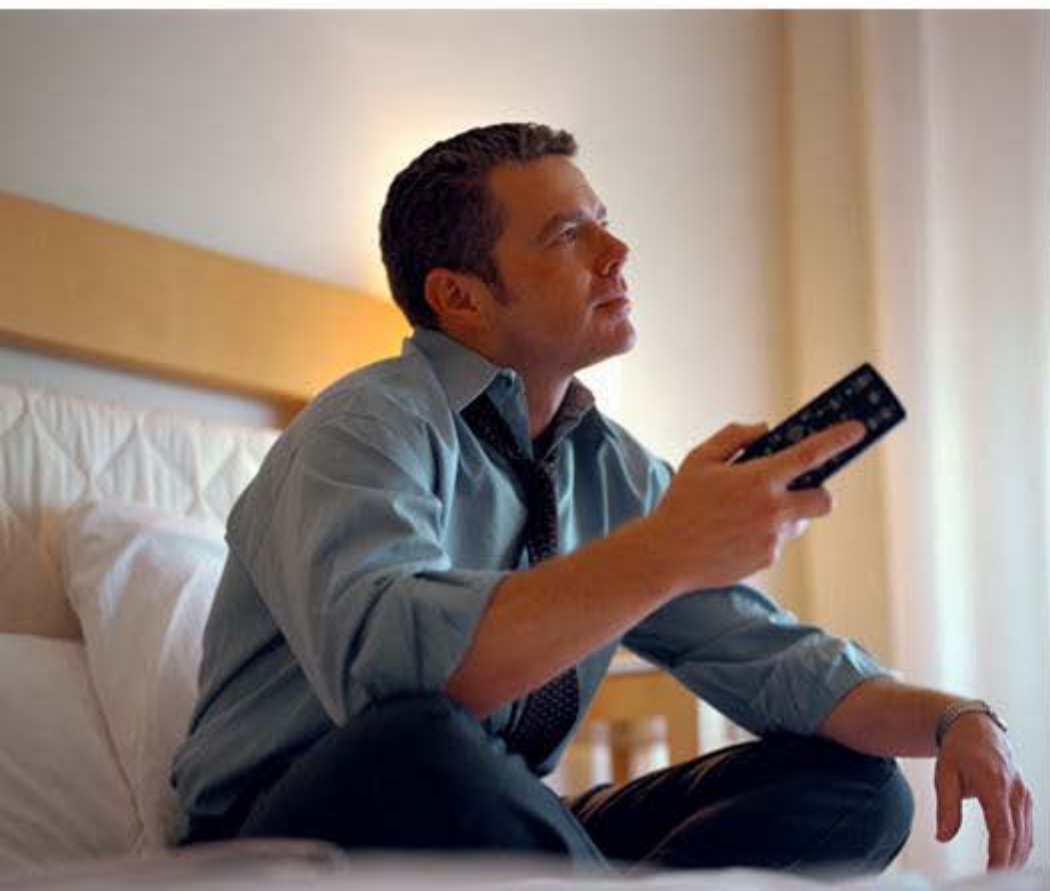


DESTINATION 
NETWORK

CONSUMER RESEARCH



A UNIQUE MESSAGING OPPORTUNITY

Environment

- Uncluttered
- Relevant, connected & positive
- Ad blocker proof
- Stress free & secure
- Free of distractions

Audience

- Engaged
- Receptive
- Relaxed
- Open-minded
- Seeking new experiences

ENVIRONMENT MATTERS

TV is more than buying audiences. Environment matters. *Where the ad lives is just as important as who it reaches, maybe more.*

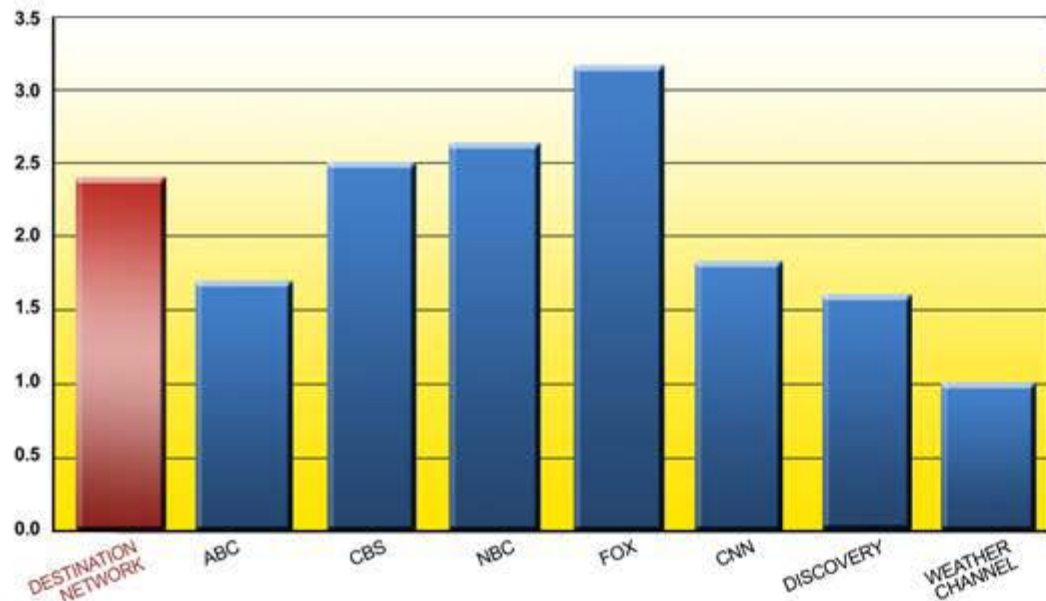
Advertisers who limit themselves just to audience buying run the risk of placing ads in front of people at a time when they aren't engaging or responding.

*Jon Steinlauf, President-National Ad Sales, Scripps Networks, March 22, 2017 Ad Age



DESTINATION
NETWORK

NIELSEN RATINGS



Destination Network is rated as part of the Outside Television affiliate network. Destination markets that have participated in ratings studies include Atlanta, New Orleans, Panama City, Destin/Mobile/Pensacola, Key West and Myrtle Beach/Pawleys Island.

Overall Nielsen Ratings for the year 2018



DNET. DIGITAL. DESTINATION NETWORK

Total Network Digital Views*

01/01/2015 – 03/31/2024

31,395,284

App Installs

1,205,596**

Consistently rated 4+ out of 5

Live Stream & VOD

All platforms



*Station Websites, Facebook, YouTube, Roku, Mobile Apps, OTT Apps, Client Embed Codes

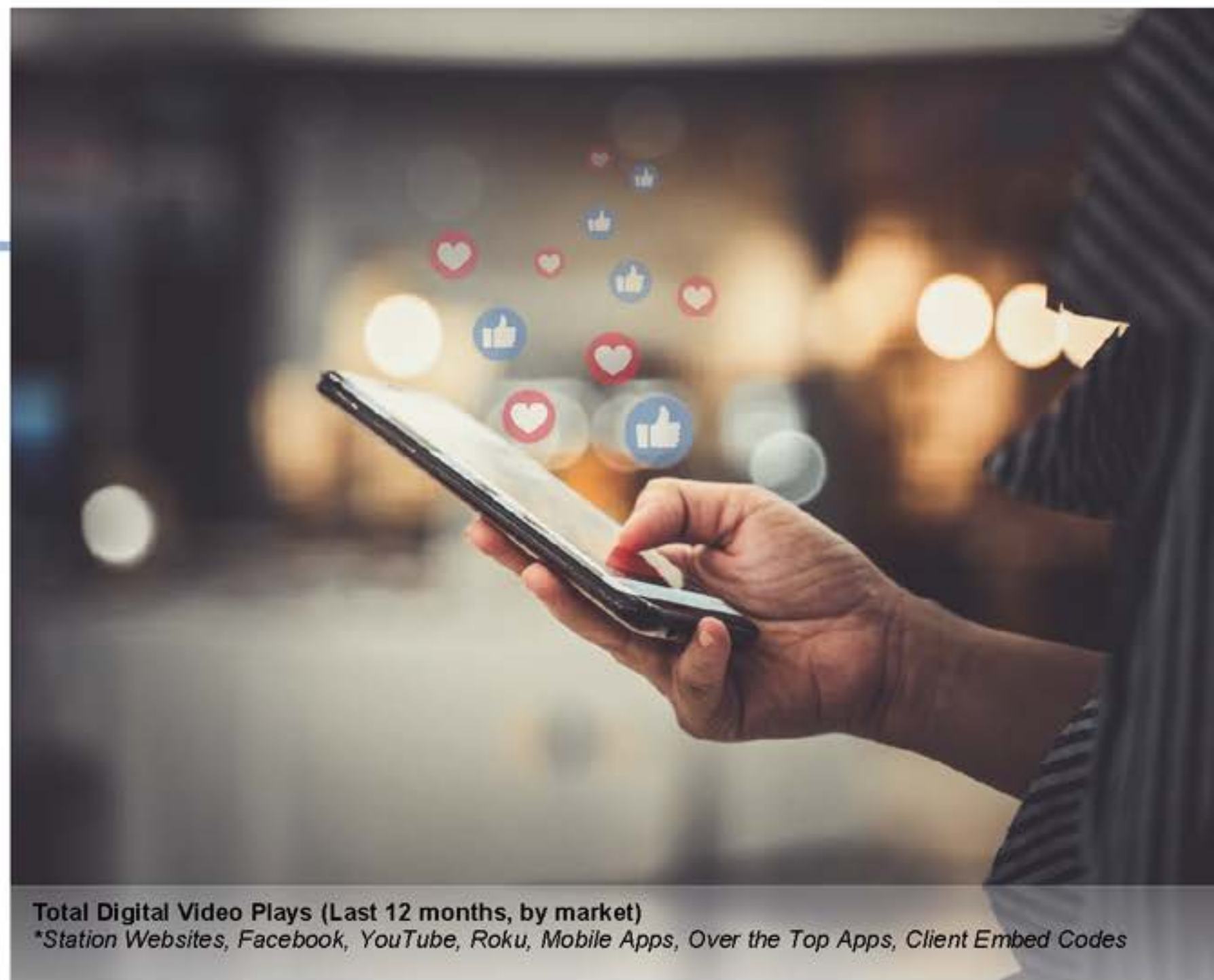
**Roku, Apple TV, Amazon Fire, Android, iOS

DNET. DIGITAL. DESTINATION NETWORK

One Year Total Digital Views*

04/01/2023 – 03/31/2024

Panama City	9,954,376
Myrtle Beach Pawleys Island	3,789,114
Alabama Florida Gulf Coast	1,000,117
Florida Keys Key West	373,244
New Orleans	117,888
Atlanta	111,012
Total 6 Markets	15,644,088



Total Digital Video Plays (Last 12 months, by market)

*Station Websites, Facebook, YouTube, Roku, Mobile Apps, Over the Top Apps, Client Embed Codes

WHY THEY WATCH

- 70% Dining
- 69% Check out Local Market
- 53% Learn the Local Lifestyle
- 51% Sports & Activities
- 47% Shopping
- 28% Nightlife
- 22% Things To Do with Kids



HOW THEY WATCH

Research reveals guests rank local Visitor Information among the top 3 most important TV options.**

52% of guests watch Visitor Information TV when available.

Average daily time viewing Visitor Information TV exceeds 100 minutes.

Over 80% of travelers operate devices while watching TV.



**"2016 In-Room Entertainment Preference Study" ADB's BusinessTV, October 12, 2016

HOW THEY WATCH

Consumers turn to the best available screen for their TV and video viewing.* Consumers are 32% more likely to enjoy an ad on a TV set than via online platforms.**

Source: Kantar data Aug-Oct 2018*
Kantar Media DIMENSION study 2018**



WHAT THEY WATCH

"Television remains the best channel for conveying emotional brand images and sustaining them over time."* Leading advertisers continue to partner online video with television - combining television's powerful immersive experience and broad reach with online video's ability to target and optimize frequency. Taken together, these two media are increasingly and critically important to advertisers' campaigns.*



*ZenithTheROI Agency, February 2019

ROI TOP PERFORMERS

“By 2021, we expect television and video to have a combined 48.8% share of global ‘display’ advertising – a higher share than television ever achieved on its own.

Television and online video are working harder for advertisers than ever before.”* Maximizing ROI through multi-screen viewership opportunities is the driving principle at Destination Network.



*ZenithThe ROI Agency February 2019

Close to the Point of Purchase

Great marketers shift investments to where conversion performance is highest... closest to the time of purchase by consumers.* In tourism markets, that means targeting visitors in hotels and resorts.

Visitors are excited to be here. They are nearby, they have money, and they are looking for ways to spend it. We are in the room with them... we are as close to the point of purchase as you can get.



“The big screen is making a comeback, bigger and better than before.” TV is the proven brand-building medium: the dominant cultural and advertising channel of choice. Far from killing television, the internet is now part of the TV and video ecosystem. Smart TV penetration has grown from under 10% to nearly 40% in four years.

[Sources: Katnar 2019 Fact Pack; Ofcom Technology Tracker 2018]



VISITOR INFORMATION CHANNELS ARE TOP TIER FOR TRAVELERS

73% of Millennials consider their Hotel TV “Very Important” vs. 54% of older guests.

Hotel and Local Information channels, OTT, broadcast channels, free VOD, Group Messaging and ability to pause live TV are the most important television services to hotel guests.

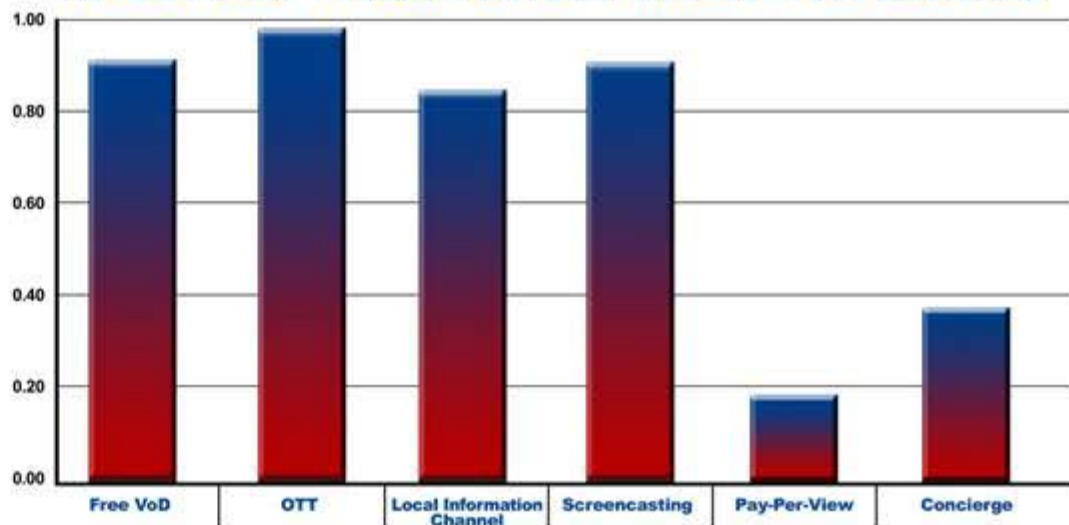
Note: DNET stations may be included in two or more ‘most important’ categories: Broadcast TV, Local Information Channels, Free VOD and OTT (Roku, Apple TV, etc.) Some properties may choose to use all four options offered by DNET. ” 2016 In-Room Entertainment Preference Study” ADB’s Business TV October 12, 2016



VISITOR INFORMATION CHANNELS ARE TOP TIER FOR TRAVELERS

With all age groups, OTT (Netflix, etc.) ranked 98%, Free VOD ranked 90% and Local Visitor Information Channels ranked 84%. Guests also want to be able to view their own content on hotel room televisions (screencasting). Guests also want to be able to view their own content on hotel room televisions (screencasting).

HOTEL GUEST IN ROOM ENTERTAINMENT PREFERENCES



**"2016 In-Room Entertainment Preference Study" ADB's BusinessTV October 12, 2016

HOSPITALITY TECHNOLOGY STUDY

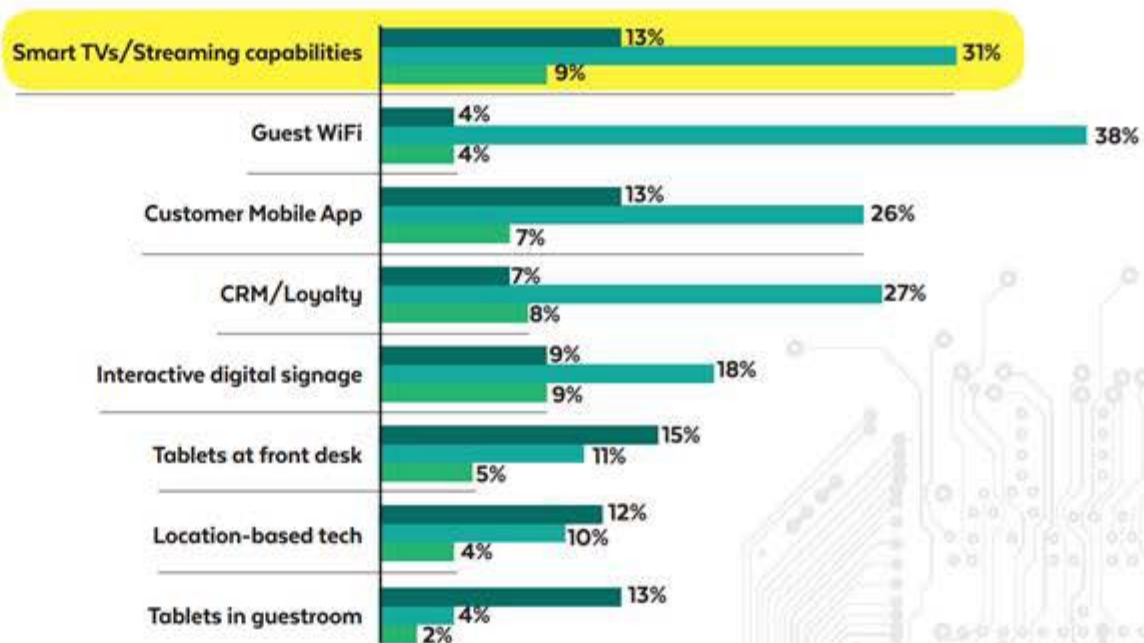
TV still tops the list for guest preference and property management investment plans. Luxury or affordable, resort or hotel, the number one guestroom technology is TV, with rapidly expanding Smart TV installation and upgrades planned.

12/15/2017 – Hospitality Technology



GUEST-FACING TECHNOLOGY UPGRADES & ROLLOUTS

● ADD FOR 1ST TIME ● UPGRADE ● NEW SUPPLIER



SIMULTANEOUS USAGE - Nielsen

AUDIENCES HAVE MORE MEDIA AT THEIR DISPOSAL & USE THEM SIMULTANEOUSLY

When it comes to the media universe, the abundance in devices, services and content has never been more prevalent, which in turn is opening up a complex web of consumption behaviors. With all of this technology at consumers' literal fingertips, which of these platforms are they focused on? The answer, in short, is pretty much all of them.

According to the most recent [Nielsen Total Audience Report](#), adults in the U.S. spent almost 10 ½ hours a day with media. With the vast amount of time Americans spend using their devices, it is inevitable that some usage occurs simultaneously. So even though audiences are dedicating hefty amounts of time to different platforms like live/time-shifted TV (nearly five hours per day), radio (nearly two hours per day), and digital devices (over three and a half hours per day), they're combining consumption in a multitude of ways.

*Q2 2018 Nielsen Total Audience Report



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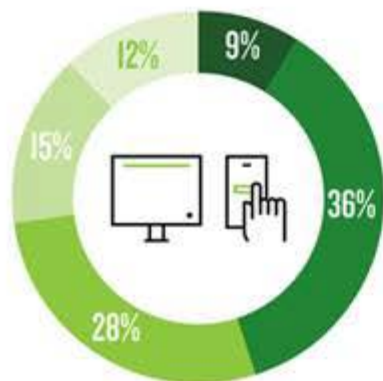
*Q2 2018 Nielsen Total Audience Report



SIMULTANEOUS USAGE - Nielsen

SIMULTANEOUS USAGE - TV AND DIGITAL

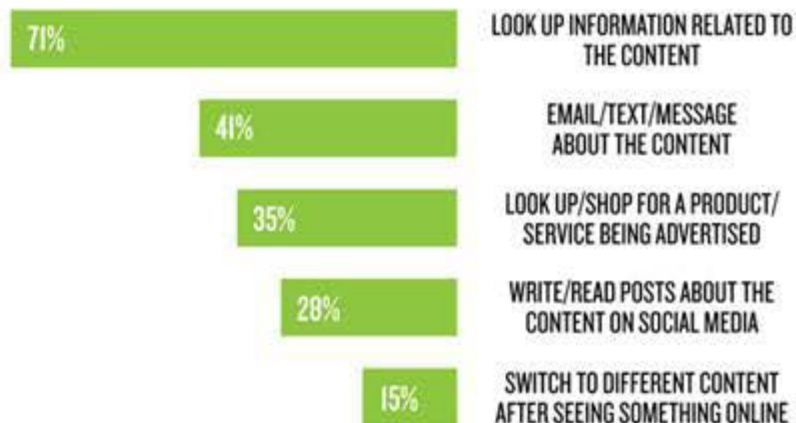
How often do you watch TV and use a digital device simultaneously?



Always Very Often Sometimes Rarely Never

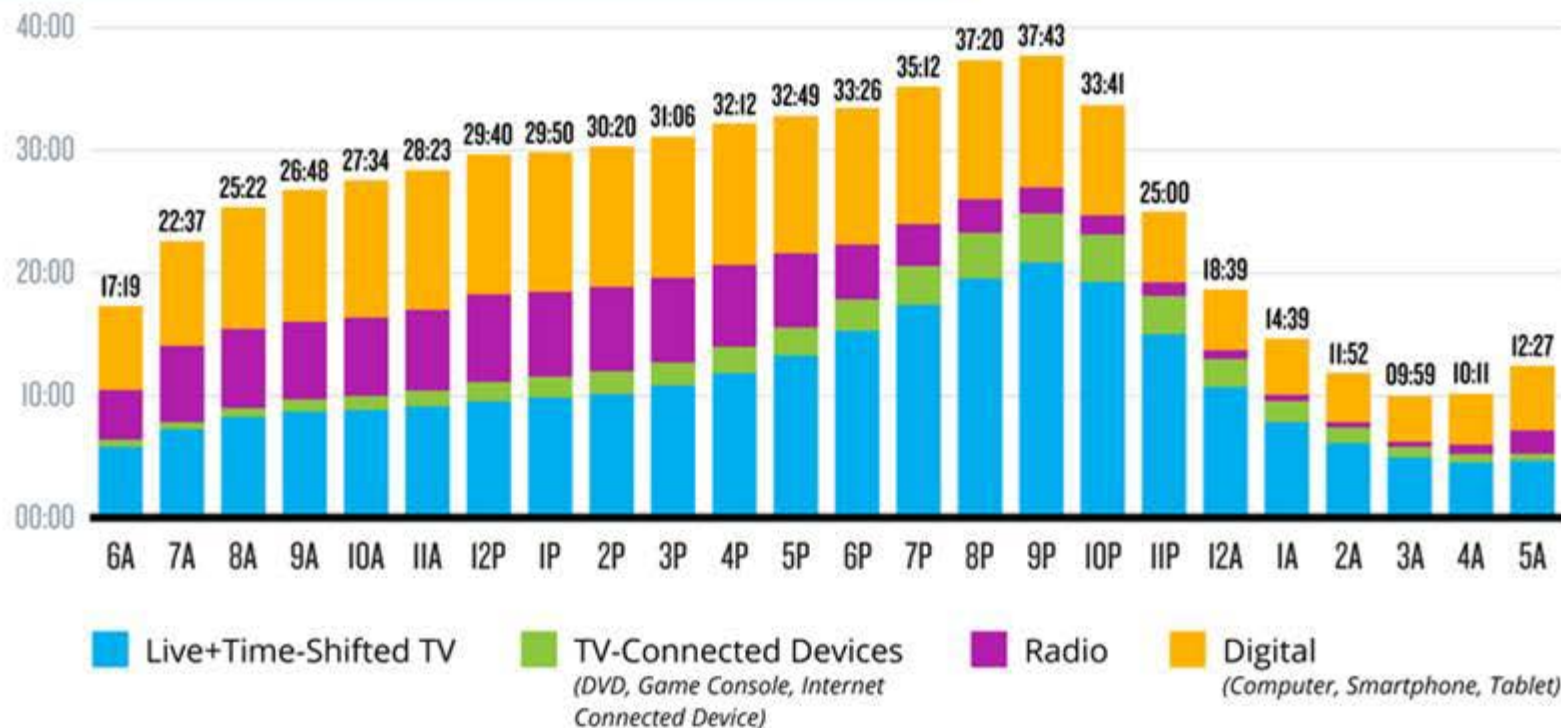
DIGITAL USAGE WHILE WATCHING TV

In what ways have you used your digital device to engage with the TV content you were watching?



*Q2 2018 Nielsen Total Audience Report

SIMULTANEOUS USAGE - Nielsen



*Q2 2018 Nielsen Total Audience Report

SIMULTANEOUS USAGE - Nielsen

According to the Nielsen survey, learning about the content they're consuming is a popular action, with 71% of respondents having looked up information related to the TV content they were viewing and 51% doing the same for audio.

Meanwhile, marketers and advertisers should be glad to know that 35% of TV viewers have shopped for the products and services advertised on the main platform.

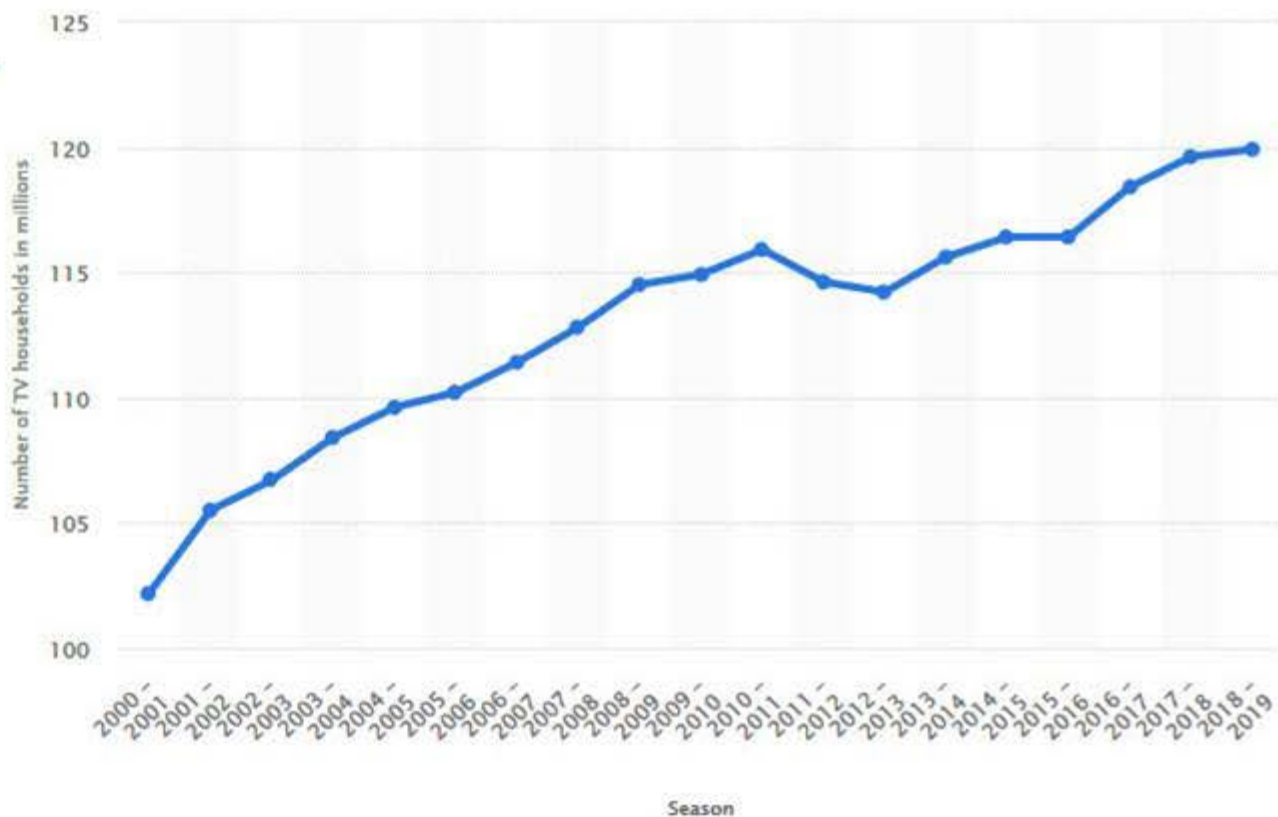
This highlights a need for an omnichannel marketing strategy in the digital age, as well as making sure brand messages lean into click-through conversion.

*Q2 2018 Nielsen Total Audience Report



TV HOUSEHOLDS

This graphic presents the number of TV households in the United States from the season 2000-2001 to the season 2018-2019. The number of TV households in season 2018/19 is estimated at 119.9 million.



LEISURE TIME

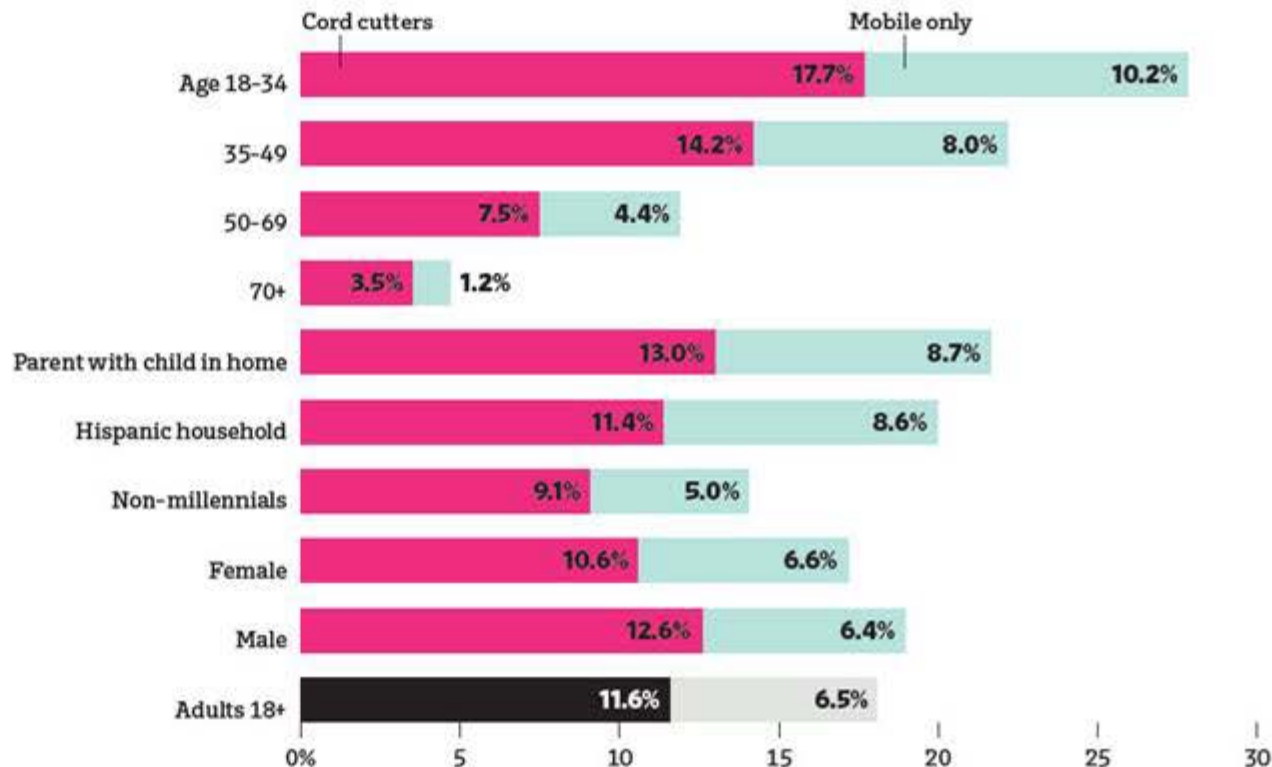
Television is still, by far, the preferred leisure time activity for Americans.

	Age									Gender	
	15+	15-19	20-24	25-34	35-44	45-54	55-64	65-74	75+	F	M
Average leisure hours per day in 2017											
All days	5.2	5.6	5.2	4.2	4.0	4.6	5.4	7.3	7.8	5.0	5.5
Weekdays	4.7	5.1	4.5	3.5	3.3	4.0	5.0	7.1	7.6	4.5	4.9
Weekends, holidays	6.5	6.6	6.7	5.9	5.4	5.9	6.5	7.9	8.1	6.0	7.0
Average weekday leisure hours spent in 2017											
Watching TV	2.5	1.8	1.3	1.7	1.8	2.4	2.9	4.1	4.5	2.4	2.6
Socializing and communicating	0.5	0.6	0.9	0.5	0.5	0.4	0.5	0.6	0.6	0.6	0.5
Playing games and computer use for leisure	0.5	1.0	1.1	0.4	0.2	0.3	0.3	0.5	0.4	0.4	0.5
Reading	0.3	0.1	0.1	0.1	0.2	0.2	0.3	0.6	0.8	0.3	0.2
Participating in sports, exercise and recreation	0.3	0.7	0.2	0.3	0.2	0.2	0.2	0.3	0.2	0.2	0.3
Relaxing/thinking	0.4	0.3	0.3	0.2	0.2	0.3	0.5	0.6	0.7	0.3	0.4
Other leisure and sports activities ¹	0.4	0.7	0.6	0.3	0.3	0.2	0.3	0.4	0.4	0.3	0.4

Source: Bureau of Labor Statistics' 2017 American Time Use Survey. More info: [bls.gov/tus](https://www.bls.gov/tus). 1. Including travel related to leisure and sports activities.

Cord Cutters

Percent of people in various age groups who don't subscribe to a traditional, legacy cable or satellite TV service but have access to online content through at-home or mobile internet



Source: Simmons Research, National Consumer Study, Spring 2018. More info: simmonsresearch.com. Cord cutters include cord nevers (those who have never paid for TV).

Digital Time

Smartphones are the digital platform of choice for young adults

Age	Smartphone app	Desktop	Smartphone web	Tablet app
18-24	70.6%	17.4%	5.7%	5.7%
25-34	63.7	24.0	6.7	4.7
35-44	63.4	22.8	7.5	5.3
45-54	60.5	24.9	6.7	6.4
55-64	62.3	21.4	7.9	6.9
65+	41.0	34.1	5.5	15.1
Adults: 18+	61.9%	23.3%	6.8%	6.6%

Source: Comscore, October 2018. Numbers rounded. More info: [comscore.com](https://www.comscore.com).

Resilient Established Media

Research based solely
upon connected
consumers



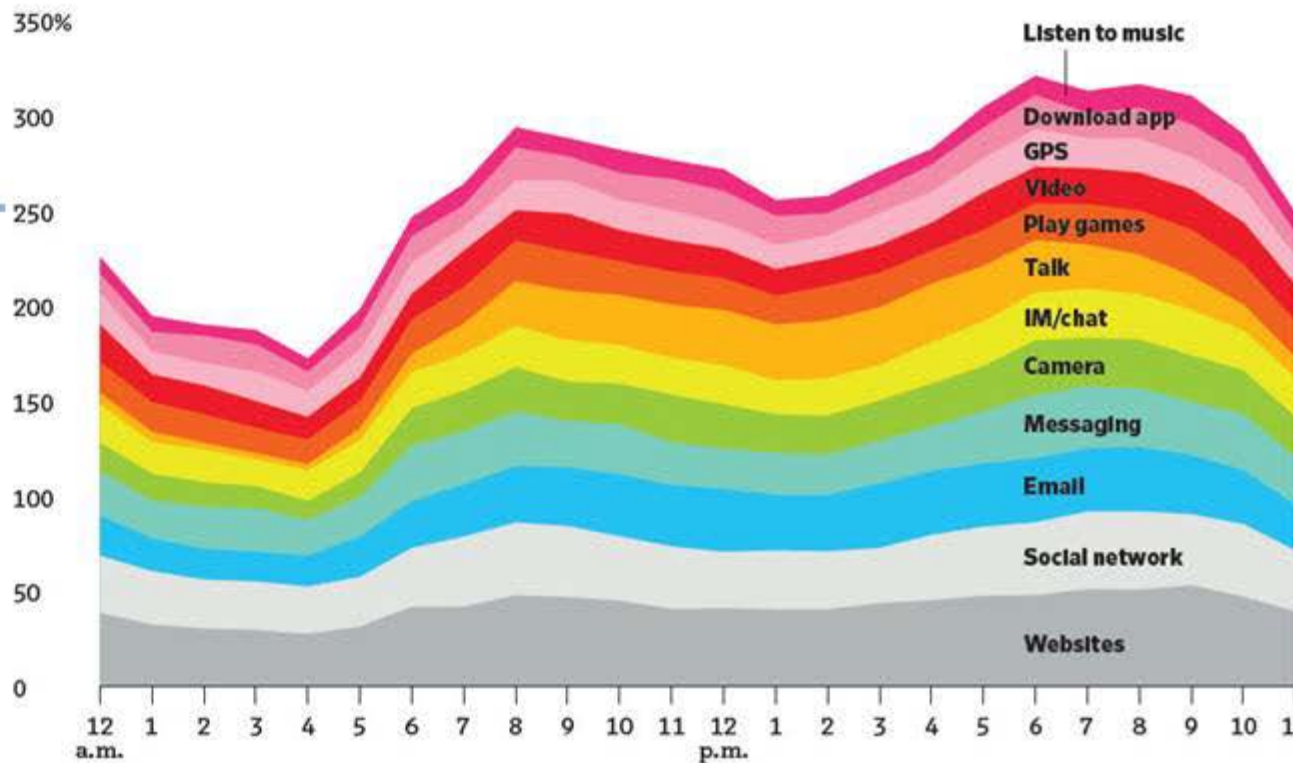
96%
access TV via
a **TV set**



88%
listen to the
radio **offline**

When & How Smartphones Are Used

Accessing websites is the most popular activity. Peak hour for web surfing is 9pm when 53% use the phone to visit websites, which coincides with the height of television audience viewing.



Source: Simmons Research, Simmons Connect Study, Spring 2018. More info: simmonsresearch.com. Percentages indicate unduplicated aggregate percentage of smartphone owners who engage in the activity in that hour at least once during a typical week. For example, 53 percent of smartphone owners use their phone's web browser to access a website between 9 p.m. and 10 p.m. at least once in a week.

LODGING INDUSTRY REPORTS

The TV is the design and media center of the room. It's the first thing guests see and has the greatest impact on the overall impression of an establishment. Luxury or affordable, resort or hotel, the number one guestroom technology request is WIFI and #2 is HD & Smart TV.





Longer Videos Mean Higher Engagement

Wochit's Social Index, reveals videos longer than 90 seconds see 78.8% more shares and 74.6% more views when compared to videos of other lengths. There was also a correlation between the number of videos published on social platforms and the number of followers of that page. Publishers that increased their video posting saw their follower numbers increase accordingly.

AUDIENCE RESEARCH

The traveling audience is 3.6 times more likely to watch Destination stations than other networks while traveling; they are more likely to try new products, and they experience over 30% greater ad recall because they are tuned in to see the ads.*



THE RATINGS PROGRAM

Overview: Studies conducted with Nielsen Media Research (NMR) 12 times per year. Outside/Destination conducted its first ratings study with Nielsen April, 1997.

Method: Telephone coincidental

Sample: Mix of visitors staying in resort lodging properties, condos, rental homes, and second homes as well as locals; Call list is typically 80% market visitors and 20% market residents.

Frequency: Outside/Destination Network collects ratings data each month and produces quarterly reports.

Sample size: NMR calls about 2,700 people in a typical quarter (more than 10,000 people annually).

Market measurement: At least 50% of sub base every quarter. The entire plan is approved by Nielsen at the start of each study period.

Reports: NMR collects and reports ratings, share, VPVH, and age demo % data; Outside Television provides this data to Management Science Associates (MSA) to produce buy analysis reports/posts for national advertisers.



DESTINATION NETWORK

Atlanta

New Orleans

Florida & Alabama Gulf Coast

Myrtle Beach

Pawleys Island &
Georgetown County

Key West & the Florida Keys

