

BEACH TV

BUILDING BRAND CONNECTIONS

AT HOME

**LIFE IS
STRESSFUL**



ON VACATION

**LIFE IS
EASY GOING**





A UNIQUE MESSAGING OPPORTUNITY

The Destination Network is a visitor information network serving resort and destination cities in the Southeast.

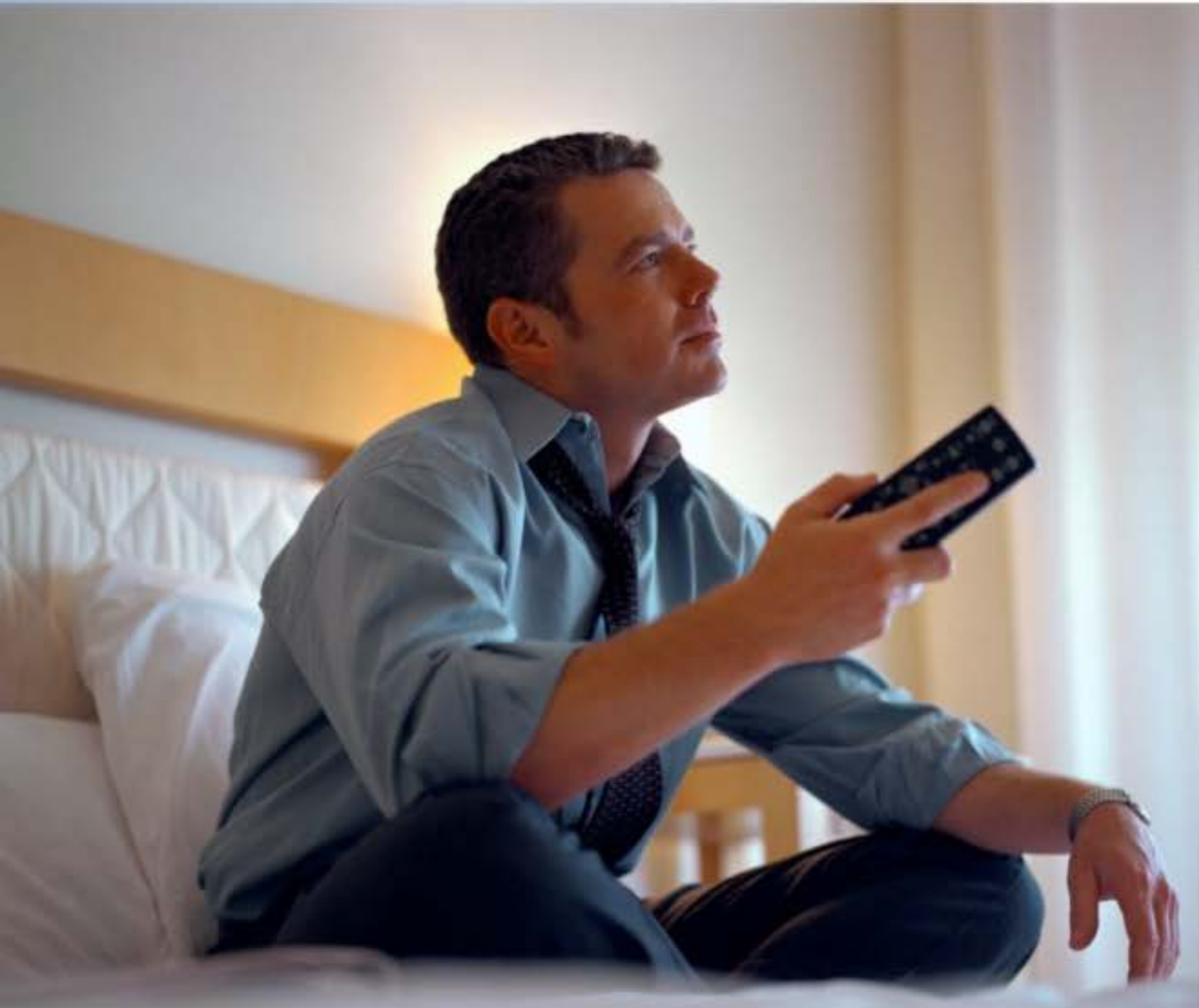
No other network reaches the audience we do as effectively as we do, and that is important because, once out of their normal routine, travelers are proven to be more *present* in whatever they were doing, and they are eager to try new things.

A UNIQUE MESSAGING OPPORTUNITY

We are not traditional TV. We are a visitor information service delivered *on* the TV in the quiet comfort and safety of hotel and resort rooms.

Viewers need, and are actively seeking, the information we provide.





A UNIQUE MESSAGING OPPORTUNITY

Environment

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

Audience

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

THE DESTINATION NETWORK

We are always there for them, 24/7/365... on their time table.

We are available when they want, and we air *only* what they want.

We deliver a rich flow of uplifting, compelling stories... an ideal environment for ads, and, we offer many unique opportunities for our advertisers to become part of the destination's story.



DESTINATION
NETWORK

THE DESTINATION NETWORK

We are 100% local.

We are 100% good news.

We are beautiful to watch.

We are the authorities on fun!



ENVIRONMENT MATTERS

Where an ad lives is just as important as who it reaches, maybe more.

Advertisers who limit themselves to audience buying and measure ROI only by hard metrics, run the risk of placing ads in front of people at a time when they aren't engaging or responding... or worse, placing their brand in bad company.



*Jon Steinlauf, President-national ad sales, [Scripps Networks](#) 2017 Ad Age

ENVIRONMENT MATTERS

Brands need to communicate with consumers in the environments that best match their values, and at the times when consumers are ready to move along the path to purchase.*



*Zenith The ROI Agency June 11, 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 our markets, that means targeting visitors who are nearby, looking for the best ways to spend their money. We are literally in their room with them... as close to the point of purchase as you can get.



*Zenith The ROI Agency February 25, 2019

OUR GREATEST STRENGTH

Building brand connections
with a special audience,
in a special place...
in a very special frame of mind.





Markets & Audiences

DNET. DIGITAL. DESTINATION NETWORK

Total Network Digital Views*

01/01/2015 – 08/31/2024

33,139,216

App Installs

1,229,816**

Consistently rated 4+ out of 5

Live Stream & VOD

All platforms



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

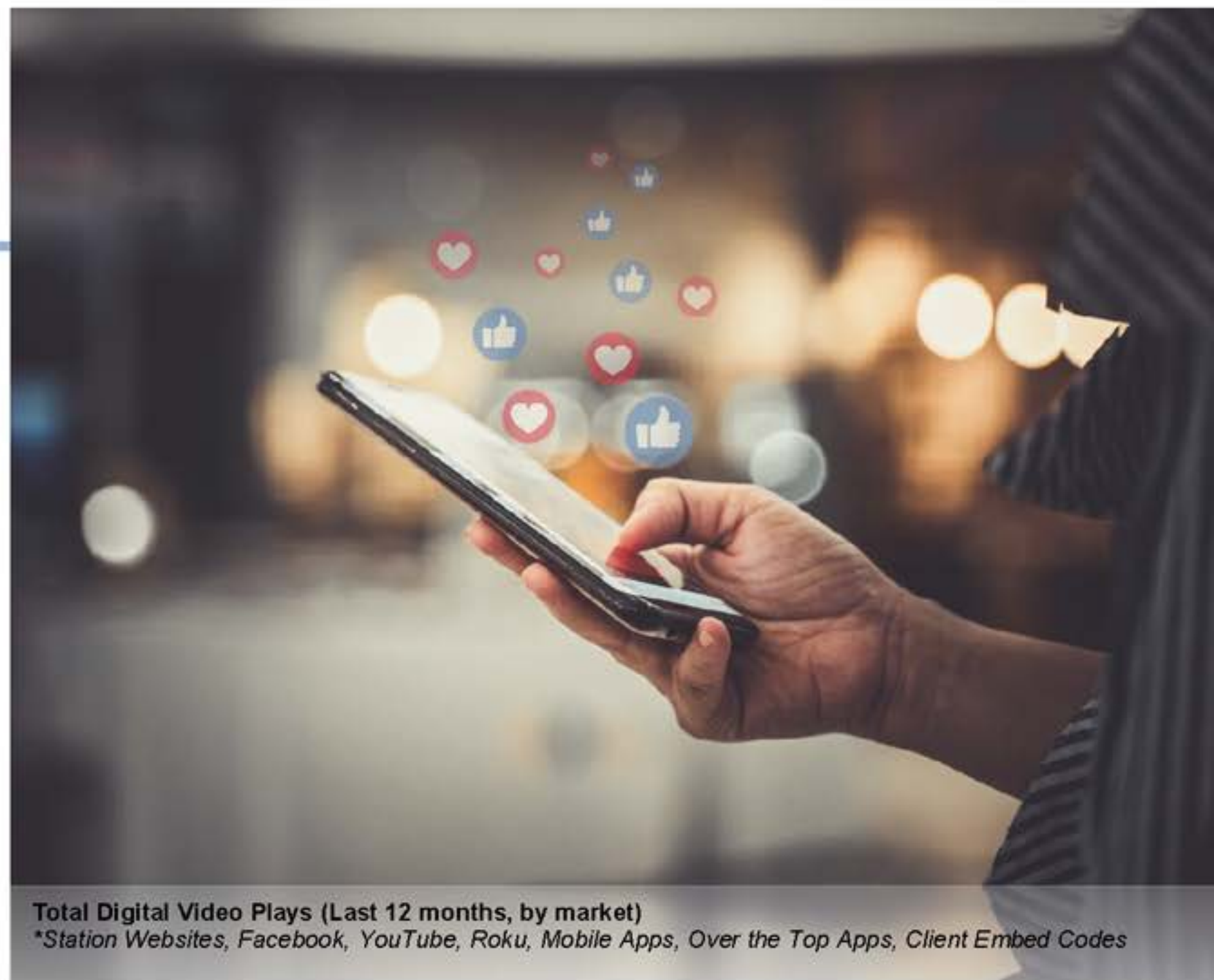
**Roku, Apple TV, Amazon Fire, Android, iOS

DNET. DIGITAL. DESTINATION NETWORK

One Year Total Digital Views*

08/01/2023 – 08/31/2024

Panama City	9,412,365
Myrtle Beach Pawleys Island	3,480,011
Alabama Florida Gulf Coast	1,001,753
Florida Keys Key West	493,675
New Orleans	119,157
Atlanta	111,992
Total 6 Markets	14,618,953



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

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

DNET. DIGITAL. DESTINATION NETWORK

Roku Rules Connected TV

Roku Growth	173%
Roku Share	43%
Amazon Fire TV Growth	145%
Amazon Fire Share	18%
Apple TV Growth	129%
Apple TV Share	10%
Total Streaming Growth	143%





PANAMA CITY DMA

Bay | Gulf | Franklin | Washington Overnight Visitors

10,512,000*** Accommodations 17,000+

South Walton Overnight Visitors 4,818,000***

SOWAL Accommodations (90% Luxury) 11,000+

Residential

Population 283,761*

Total TV Households 135,550**

Cable 65,010**

Satellite 55,300**

Broadcast Only 18,977 (12.7%)**

OTT & Apps 328,122**

**Nielsen Universe Estimates July 2017 ~ Roku, Apple TV, Amazon Fire, Android, iOS June 2014
*florida.hometownlocator.com July 2016: Bay 171,089, Walton 59,820 Washington 24,974 Gulf 16,101 Franklin 11,777 *** Bay County 16,000 units x 60% occupancy x 365 x 3 avg per room; Walton County 11,000 rooms (90% luxury) x 60% occupancy x 365 x 2 avg per room





MOBILE PENSACOLA DMA

Overnight Visitors

Escambia 7,456,013[^] Okaloosa 4,133,515^{***}
Santa Rosa 321,000[^] Alabama 12,000,709^{^^}

Transient Rooms

Escambia 9,586⁺ Okaloosa 14,615^{***}
Santa Rosa 1,307⁺ OB/Gulf Shores 17,232[°]
Total: Florida 37,774 Alabama 23,000

Residential Population

Florida 657,727[°] Baldwin County 200,388[°]
Mobile County 417,771[°]

TV Households 528,320^{**} OTT & Apps 214,746⁻

Cable 207,750^{**} Satellite 225,930^{**}

Broadcast Only 73,414,600 (14%)^{***}

Nielsen Universe Estimates July 2017 - Roku, Apple TV, Amazon Fire, Android, iOS June 2024 *Florida and Alabama.HomeTownLocator.com July 2015 Okaloosa 189,816 Santa Rosa 162,042 Escambia 305,869 * Okaloosa EDC Rooms x .45 occupancy x 365 x Avg 2 per room ^^Alabama Office of Tourism Smith Travel Research April 2015 Rooms x 63.6% Occupancy x 365 x Average 3 per room @Baldwin County Office of Tourism ^ Visit Pensacola 2015 °Florida Department of Professional Regulation



Pensacola, Pensacola Beach & Perdido Key

Bed Tax Collection @ 4% = \$9,000,000
Average occupancy 64%
Length of stay 8.5
Average spend per Overnight Party \$2,035
Average spend per Day Tripper Party \$505
Top Feeder Markets: Mobile, AL, Atlanta, GA
New Orleans, LA, Birmingham, AL, Nashville, TN
Average Party size 2.7
Average Household Income \$80K
Average Age 46
Leisure 93%
Repeat 60%
Average Advance Planning 50 days



Orange Beach & Gulf Shores

- Bed Tax Collections @ 2% = \$9,370,000
- Average occupancy 64%
- Length of stay 6
- Average spend per Overnight Party \$6,500
- Average spend per person/per day \$127
- Top Feeder Markets: LA, AL, MS, TN, GA
- Average Party size 7
- Average Household Income \$109K
- Marital Status: 75% married
- Average Age 41
- Leisure 95%
- Repeat 80%
- Drive 97%
- 52% booked 3-6 months+ in advance



\$2,900,000,000+

Direct Economic Impact Annually of Tourism to Walton County

For every \$1 of tourism advertising, Visit Florida calculates that \$390 is generated in tourism spending and \$23 in new sales taxes



BEACHES OF SOUTH WALTON



\$8.3M

DESTINATION IMPROVEMENTS

(in progress & planned)

including parking, bike paths, beach boardwalks, signs, bathrooms, beach safety, & more

VISITORS GENERATE

65%

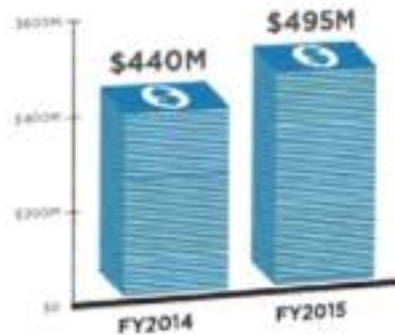
OF ALL SPENDING
IN WALTON COUNTY

PER VISIT AVERAGE
AS HIGH AS

\$5,400

12.5%

GROWTH IN RENTAL REVENUE



South Walton was #1 Coastal Economy in Florida for
VISITOR TOURISM
in June & July 2015

\$202M+

Spent on Accommodations in June & July



SHOULDER SEASON GROWTH

Outpacing peak season, over 10 years

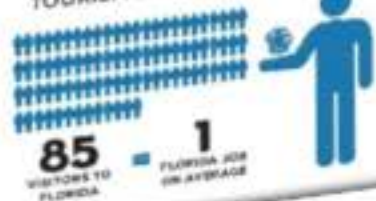
16 Beach Neighborhoods along 26 miles of Gulf front listed East to West:

Inlet Beach
 Rosemary Beach
 Alys Beach
 Seacrest
 WaterSound
 Seagrove
 Seaside
 WaterColor

Grayton Beach
 Blue Mountain
 Santa Rosa Beach
 Gulf Place
 Dune Allen
 Sandestin
 Seascape
 Miramar Beach

19,500

JOB'S DIRECTLY RELATED TO
TOURISM IN WALTON COUNTY



TOP 11

in annual visitor spending

41ST

in population of
67 FLORIDA COUNTIES



11,000+

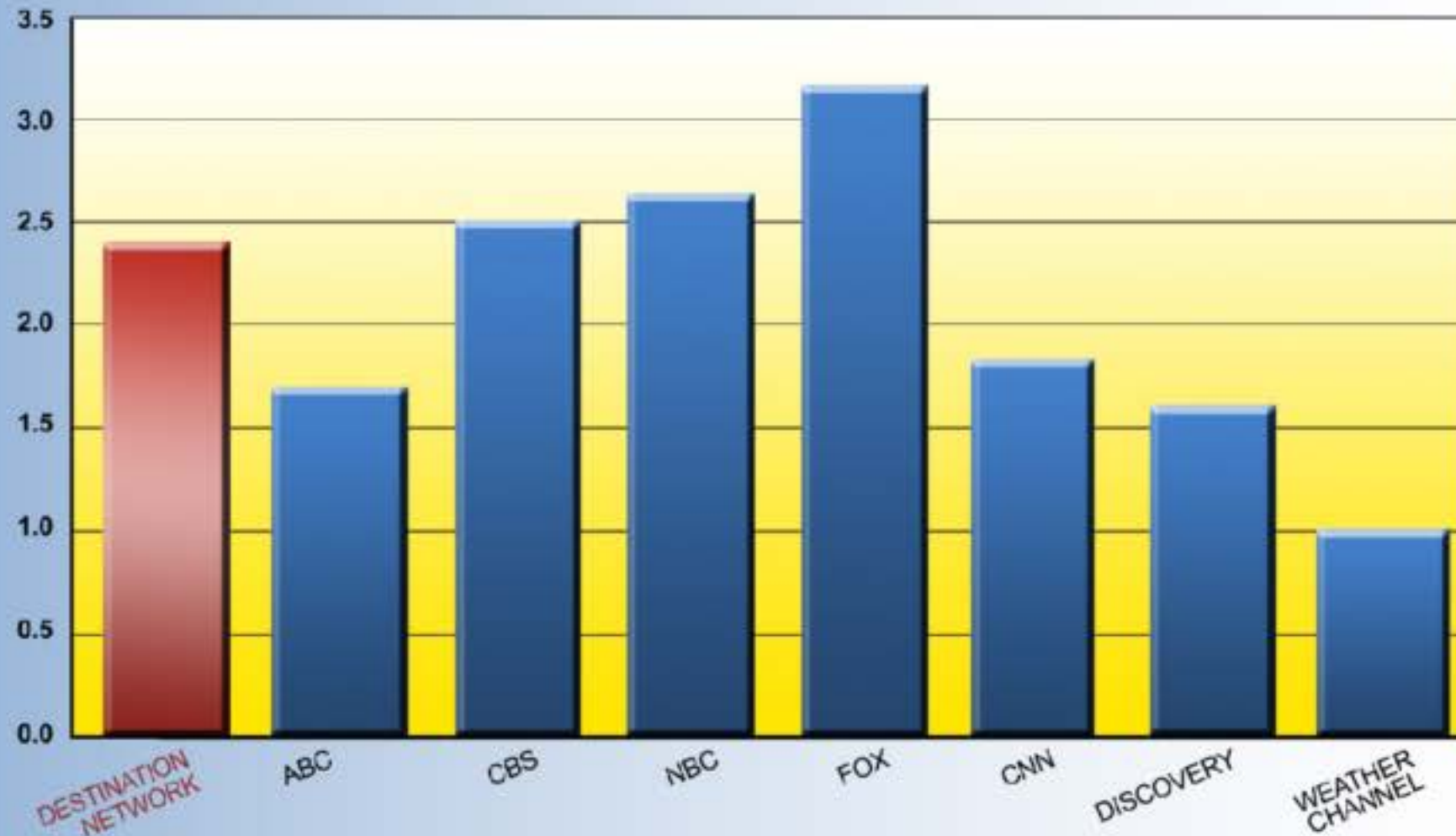
ACCOMMODATIONS

90% being luxury homes, cottages and guest houses



Research & References

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

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



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



GREAT CONTENT IS GREAT CONTENT

Guests rank Local Information channels among the top 3 most important TV channel options.**
52% of guests watch Visitor Information channels when available, and average daily time viewing Visitor Information exceeds 100 minutes.
Overall, guests watch TV an average of 4 hours per day, and over 80% operate devices while watching.



**2016 In-Room Entertainment Preference Study ADB's Business TV October 12, 2016

GREAT CONTENT IS GREAT CONTENT

"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.*



*Zenith The ROI 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.

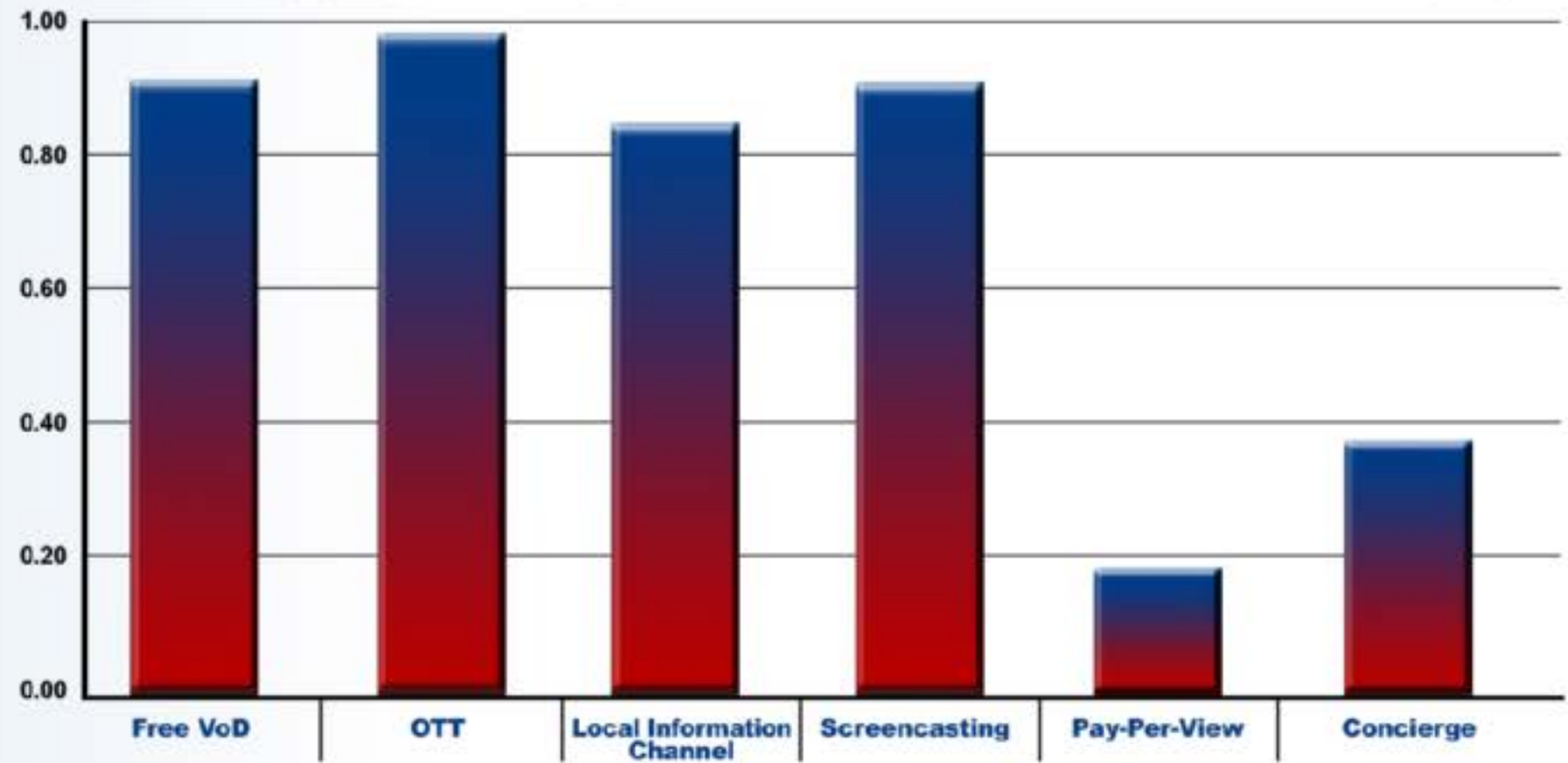


*Zenith The ROI Agency February 2019

RESEARCH & REFERENCE

With all age groups, OTT (Netflix, etc.) ranked 98%, Free VOD 90% and Local Information Channels 84%. They 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 Business TV October 12, 2016

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 #1 guestroom technology request is WIFI and #2 is HD TV.



KANTAR INDUSTRY REPORTS

“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: Kantar 2019 Fact Pack]



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**



RESEARCH & REFERENCE

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.*



*Source: Nielsen Media Research, Telephone Coincidencials dating back to 2009

2018 HOSPITALITY TECHNOLOGY STUDY

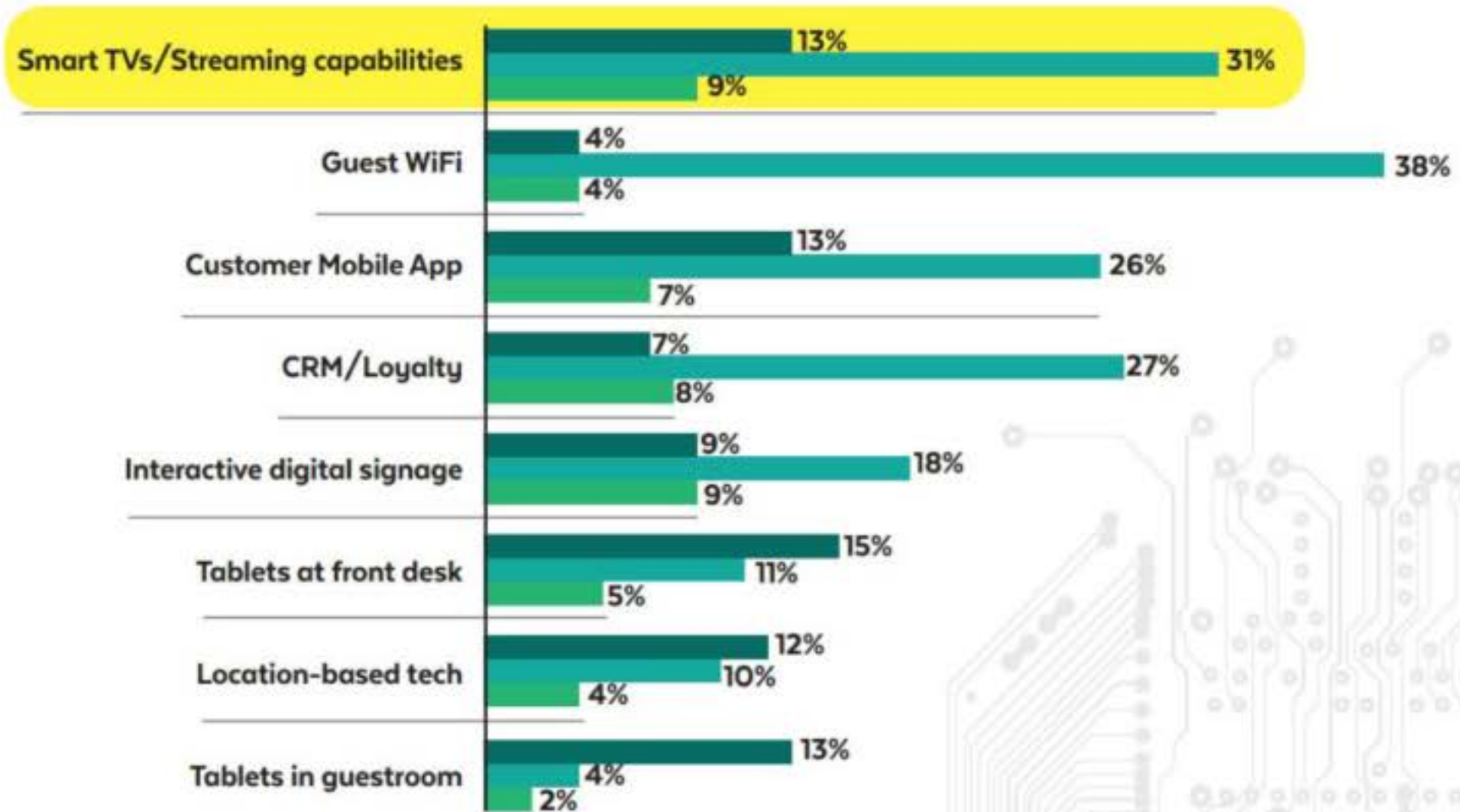
TV still tops the list for guest preference and 2018 property management investment plans. Luxury or affordable, resort or hotel, the number one guestroom technology is TV, with rapidly expanding Smart TV installation and upgrades continuing at a rapid pace.

Hospitality Technology



GUEST-FACING TECHNOLOGY UPGRADES & ROLLOUTS

● ADD FOR 1ST TIME ● UPGRADE ● NEW SUPPLIER



DIGITAL CONTENT CREATION PARTNERSHIP

Facebook CEO Mark Zuckerberg says, *"We see a world that is video first with video at the heart of all our apps and services."*

We help our clients navigate the complex and ever-changing art of social media content management with an arsenal of experience, skill and creativity... backed up by a massive video library accumulated over three decades.





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.

Generation Z is Not the Next Big Thing*

Marketers are shifting focus from age to mindset, behavioral change and disposable income.

We are most receptive to new things during life changes. Historically, those changes happened before age 35, but we live longer now; we have life changes far into our 70s and 80s. Just targeting the young is no longer enough.* Half the babies born in wealthier countries since 2000 may reach age 100.**

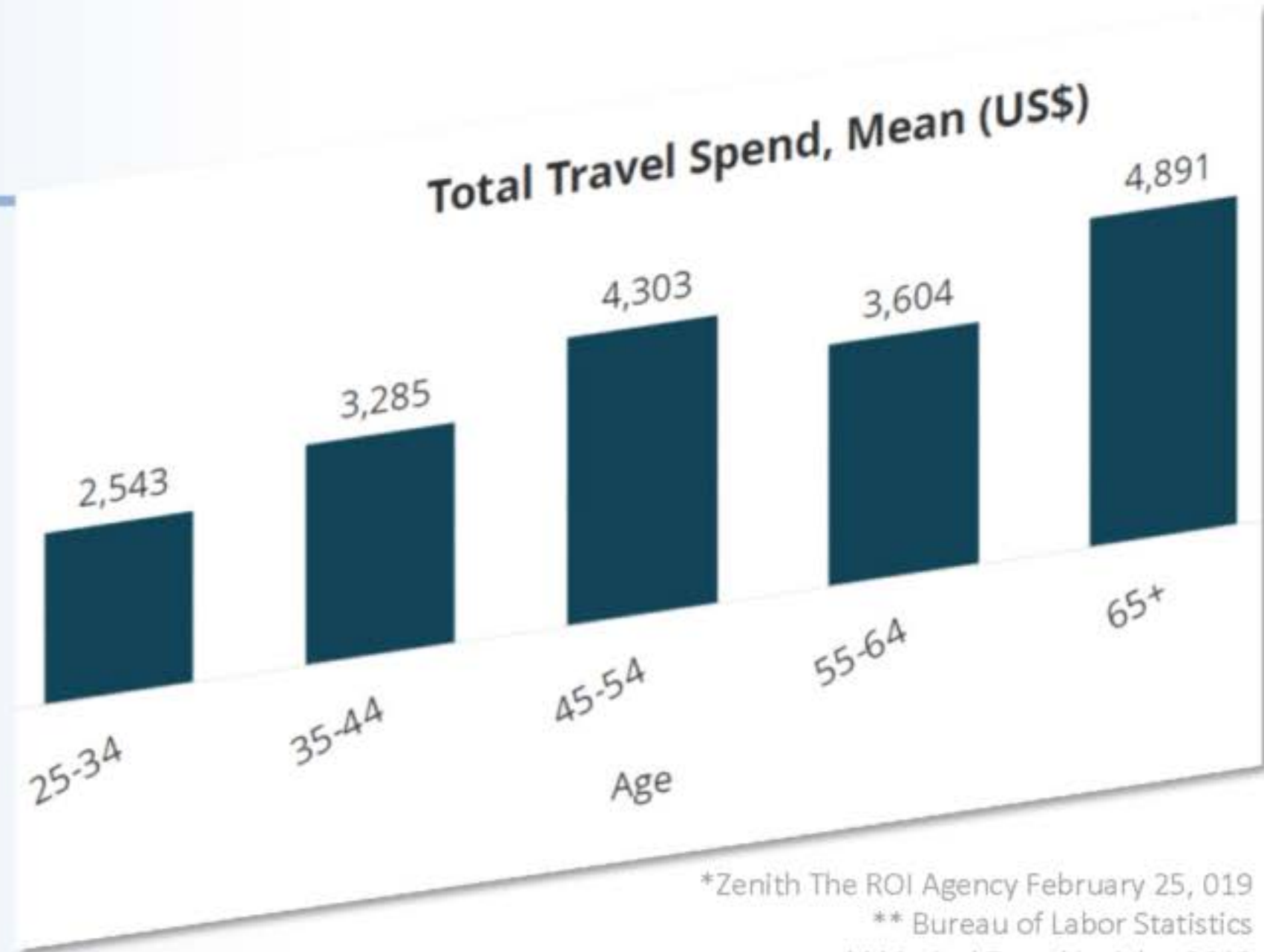


*Zenith The ROI Agency February 25, 019

**The Human Mortality Database 2018

Generation Z is Not the Next Big Thing*

The rules are also changing when it comes to disposable income. Today, young people struggle to find work and don't have the spending habits of previous generations.* 16 to 19 year olds will represent just 26% of the labor force in 2024, compared to 52% in 2000.** Older generations are now determined to enjoy life and embrace new things. They have money, and they spend it!



*Zenith The ROI Agency February 25, 019

** Bureau of Labor Statistics

***Arrival Travel Insights 2019



MARKETING OPPORTUNITIES

- Branded Content
- Editorial
- Sponsorships
- Product Placement
- Spot delivery
- Live Cams
- Content Creation Partnerships
- Hosted Endorsements
- Special Event Promotions

HOW DO THEY FIND US?

Lodging technology is moving rapidly. Guests enjoy an impressive array of user friendly on-screen channel guides and Welcome Apps. In addition, we advertise in Visitor Magazines, sponsor special events and promote our station direct to guests through our network of lodging partners via other in-room guest information products.



PROGRAM LINE UP EXAMPLE

Fun & Sun Daily 6-10a A daytime guide to daytime fun and exploration: sports and recreation, attractions, special events, parks and neighborhoods, with shopping reviews, local history and culture.

Sneak Prevue Daily 10a-12p A preview of restaurants and nightlife, with recommendations for lunch spots and the best Bloody Marys.

Destination Network Daily 12-2p & Weekends 9-10am Travel, Architecture, Interior Design and real estate.

Emerald Coast Daily 2-4p It's check-in time for most hotels & condos. As guests unpack, they turn us on for a review of the best shopping, golf, galleries, museums, local characters and local color.

Prime Dining Daily 4-8p Celebrity chefs, restaurant reviews and spectacular preparations of local dishes have made Prime Dining one of our most popular and successful dayparts. Perfect timing... just before dinner.

Nightwaves Nightly 8p-12a Restaurant reviews, celebrity chefs, special events, cocktails, wine and local craft beers, with a spotlight and the Gulf Coast's vibrant music, arts and culture scene

Late Night Late Night 12-6a The best late night entertainment, with a focus on local musicians and artists, targeting the hospitality and entertainment industry.

Our Shows

Local News 10 Minute Updates at the top of the hour - Good news only! Current exhibits & special events, sports, dining tips, parks and wildlife, plus interviews with local leaders and local happenings.

Nightlife Nightly 7-8p & 12-1a Colorful reviews of the best nightlife and entertainment options. Concerts, events, musicians & the best bartenders.

Margit's Top 5 Restaurant Countdown Daily 10-12am, 4-7pm & Nightly between 8 and 11:30pm Professional Food Critic and Travel Writer, hosts our network's most popular show... where to eat! Of Course!

Destination Travel 7x per day, an innovative and fun way to learn what the Gulf Coast has in common with other Destination Network markets: New Orleans, Atlanta, the Grand Strand of South Carolina, Key West and the Florida Keys.

Game Day Every day 7:30am & 6:30pm plus Weekends 9:30am & 10:30pm Hosted show opening with five editorial recommendations for best places to watch the games. Sponsorship, Avails & Adjacencies

What's for Breakfast? Every morning 5:45, 6:45 & 8:45am plus Weekend Brunch Previews Non-hosted overview of five best breakfast spots and weekend brunch reviews. Sponsorship, Avails & Adjacencies

Kids on the Coast Monday-Wednesday 12:30-1p & 1:30-2p FCC Required Children's Educational programming



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.



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