



# Tourism Development Office

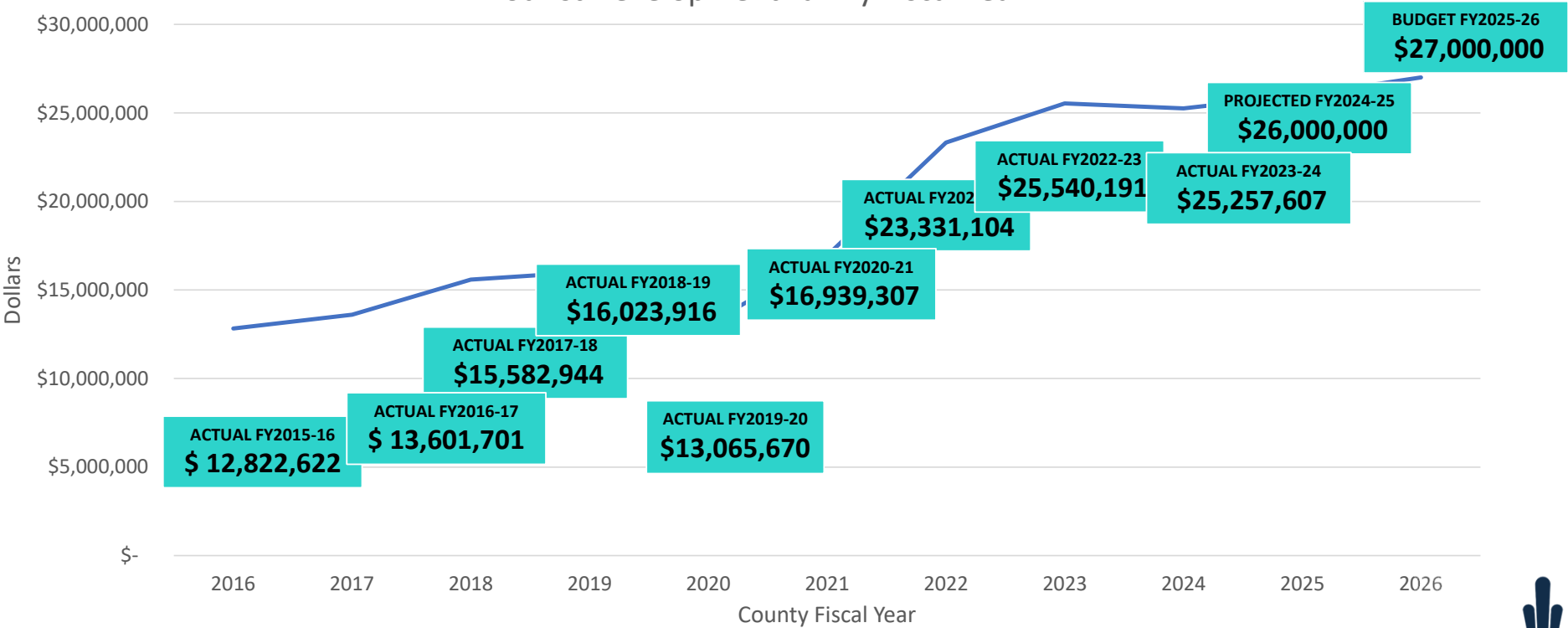
## FY 2025–26 Marketing Plan

# BUDGET



# FY 2025-26 BUDGET

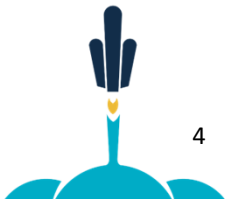
Tourist Development Tax By Fiscal Year



# FY 2025-26 BUDGET

REVENUES	FY2024/25	FY2025/26
TDT Allocation (25% of first 2 cents and 100% of 5 <sup>th</sup> cent)	\$8,100,000	\$8,100,000
Intra-Transfer from Fund 1448 (rest of 4 <sup>th</sup> cent)	\$4,233,800	\$4,196,000
Fund 1441 Balance Forward	\$1,850,000	\$1,210,000
Earned Interest	\$47,500	\$47,500
Less 5% Statutory Reduction	\$(405,000)	\$(405,000)
Less Transfer Fund 1440 - Admin	\$(591,300)	\$(648,000)
Intra-Transfer from Fund 1443/1446	\$150,000	\$500,000
<b>TOTAL REVENUES</b>	<b>\$13,385,000</b>	<b>\$13,000,500*</b>

\*Additional \$1,125,834 transferred from 1443 and 1446 for Lifeguards - **Total is \$14,126,334**





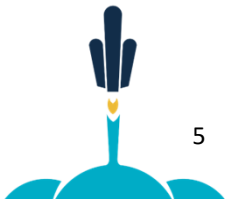
# FY 2025-26 BUDGET

EXPENSES	FY2024/25	FY2025/26
Promotional Activities	\$12,420,000	\$12,075,000
Media Relations	\$250,000	\$250,000
Software	\$70,000	\$70,000
Sports Marketing	\$340,000	\$300,000 *
Travel Expenses	\$32,000	\$32,000
Membership Dues	\$30,000	\$30,500
Tax Collector	\$243,000	\$243,000
<b>TOTAL EXPENSES</b>	<b>\$13,385,000</b>	<b>\$13,000,500 **</b>

- 50% to District 2/Cocoa Beach
- Continued use of "On Florida's Space Coast"
- New creative for Cocoa Beach, Port Canaveral, Melbourne
- Reduce International to UK/Ireland focus

\* MSP program included

\*\* Does not include \$1,125,834 for lifeguards which would equal **\$14,126,334**

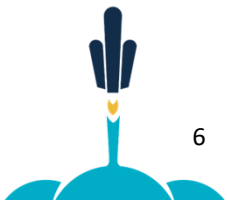


# MARKETING FUND 1441

SPLIT BY DISTRICT	Total	District 1	District 2	District 3	District 4	District 5
Shared Expenses	\$3,931,059	\$786,212	\$786,212	\$786,212	\$786,212	\$786,212
Media Expenses	\$7,869,441	\$688,851	\$5,114,039	\$688,851	\$688,851	\$688,851
<b>TOTAL</b>	<b>\$11,800,500</b>	<b>\$1,475,063</b>	<b>\$5,900,250</b>	<b>\$1,475,063</b>	<b>\$1,475,063</b>	<b>\$1,475,063</b>
		12.5%	50%	12.5%	12.5%	12.5%

Notes:

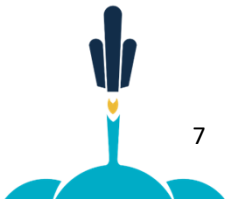
- D2 includes Cocoa Beach and Port Canaveral; D3, D4 and D5 split Melbourne and the Beaches
- \$700,000 held back for reduction in CF and \$500,000 from Fund 1446 for MSP not included



# MARKETING DISASTER FUND 1444

REVENUES	FY2024/25	FY2025/26
Earned Interest	\$15,000	\$15,000
Statutory Reduction (5%)	(\$750)	(\$750)
Fund 1444 Balance Forward	\$1,344,593	\$1,405,000
<b>NET REVENUES</b>	<b>\$1,358,843</b>	<b>\$1,419,250</b>

EXPENSES	FY2024/25	FY2025/26
Restricted Reserves	\$1,358,843	\$1,419,250
<b>TOTAL EXPENSES</b>	<b>\$1,358,843</b>	<b>\$1,419,250</b>





# DAY TRIPPER STUDY





# DAY TRIPPER STUDY

## PURPOSE OF DAY TRIP

- 74% - Leisure/vacation
- 17% - Visiting friends/family

## TOP 5 ATTRACTIONS CONSIDERED

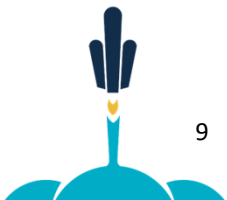
- 68% - Beach
- 60% - Unique local attractions
- 59% - Nature-based attractions such as parks
- 31% - Cultural events/art
- 20% - Shopping center/outlet mall

## CRITERIA FOR CHOOSING DAY TRIP

- 56% - Ease of parking
- 51% - Quality of beach (cleanliness, lifeguards, easy access, chair rentals, food, etc.)
- 50% - Cost of visiting
- 36% - Distance from home
- 35% - Quality of available facilities

## IMPORTANT AREA ACTIVITIES

- 74% - Opportunity to see a rocket launch
- 70% - Go to the beach
- 68% - Visit local attractions
- 40% - Visit charming downtowns
- 29% - Go shopping





# DAY TRIPPER STUDY

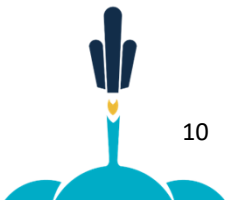
## IMPORTANT BEACH AMENITIES

- 82% - Public restrooms
- 78% - Free parking
- 78% - Convenient access to the beach
- 49% - Food and drinks available near the beach
- 37% - Public showers
- 31% - Beaches with lifeguards

## ADVERTISING RECALL

5 out of 6 day visitors noticed advertising about the Space Coast.

- 48% - Social media videos
- 37% - Photos or posts on social media
- 24% - General searches via online websites
- 19% - Billboards
- 17% - Space Coast vacation planner
- 15% - Television



# DAY TRIPPER STUDY

## VISITOR PROFILE

- 90% - White
- 64% - Female
- Median age – 57
- Median income - \$83,000

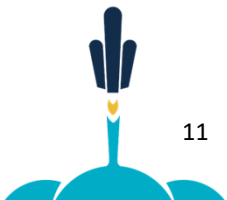
## MARKET ORIGIN

- 57% - Florida residents
- 16% - Midwest
- 12% - Northeast
- 11% - Southeast
- 4% - West
- Less than 2% - International
  - Canada - 37%
  - UK - 25%
  - Europe - 13%
  - Other - 25%

## TOP MARKETS

2 out of 5 day visitors are from out-of-state

- 27% - Orlando-Daytona Beach
- 7% - Tampa-St. Petersburg
- 7% - Jacksonville
- 7% - West Palm Beach-Ft. Pierce
- 5% - Miami-Fort Lauderdale
- 3% - Atlanta
- 3% - Fort Myers-Naples
- 2% - New York
- 2% - Detroit
- 2% - Chicago
- 2% - Philadelphia



# DAY TRIPPER STUDY

## TRAVEL PARTIES

- Average party size – 3.2 people
  - 43% - Parties of 2
  - 13% - Parties of 3
  - 23% - Parties of 4
- 63% travel without children

## TRIP EXPERIENCE

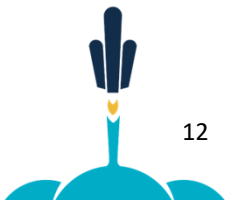
- The typical day visitor has visited 3.1 times between 10/1/23 and 12/31/24
  - 36% - Visited only once
  - 24% - Visited twice
  - 13% - Visited 3 times

## WHERE DAY TRIPPERS VISIT

- 55% - Cocoa Beach/Cape Canaveral
- 12% - Titusville
- 9% - Merritt Island
- 7% - Melbourne
- 6% - Melbourne Beaches

## OTHER AREAS VISITED

- 69% - Orlando/Kissimmee
- 54% - Tampa/St. Pete/Sarasota
- 53% - Daytona/New Smyrna
- 47% - Jacksonville/St. Augustine
- 38% - The Keys
- 32% - Miami Ft. Lauderdale



# DAY TRIPPER STUDY

## VISITOR ACTIVITIES

For day visitors here for leisure/vacation:

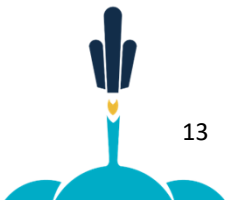
- 58% - Beach
- 49% - View rocket launch
- 44% - Visit local attractions
- 41% - Local restaurants

For day visitors here to visit friends/family:

- 61% - Local restaurants
- 56% - Beach
- 39% - Visit local attractions
- 35% - View rocket launch

## VISITOR SPENDING

- Typical day visitor spends \$239 per day
- Travel party spends \$763 per day:
  - 22% - Recreation and entertainment
  - 19% - Dining and beverages
  - 15% - Local transportation
  - 15% - Retail (souvenirs, etc.)
  - 13% - Groceries
  - 9% - Gasoline
  - 6% - Other services (medical, dry cleaning, etc.)



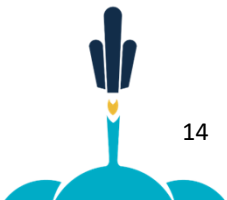
# DAY TRIPPER STUDY

## CRUISE PASSENGERS

- 1 in 7 day visitors went on a cruise
- Average time spent on Space Coast – 5.5 hours
- Majority (66%) sail the same day:
  - 36% - Royal Caribbean
  - 24% - Carnival
  - 19% - Disney
  - 9% - MSC
  - 6% - Norwegian
  - 6% - Other

## POST-TRIP EVALUATIONS

- 9 out of 10 indicated they were likely or very likely to return
- 9 out of 10 would recommend the Space Coast to their friends
- 92% intend to return within 24 months:
  - 45% - 3 months
  - 21% - 6 months
  - 18% - 12 months
  - 8% - 24 months
  - 4% - more than 24 months





# DAY TRIPPER STUDY

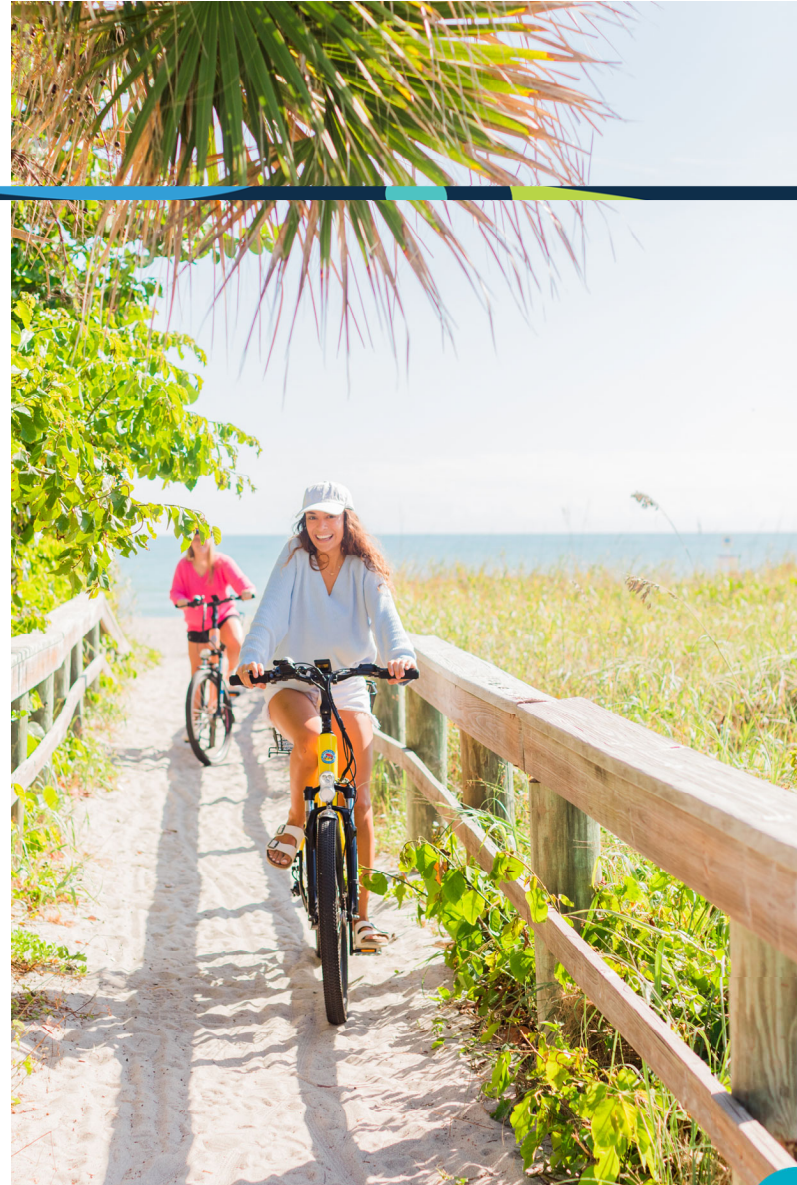
## POTENTIAL OVERNIGHT VISIT

3 out of 4 (76%) day visitors indicated they were likely or very likely to have an overnight stay on their next visit to the Space Coast

## MOTIVATION TO REVISIT

- 60% - View rocket launch
- 47% - Hotel deals
- 39% - Local attractions
- 38% - Great beach experience
- 25% - Friends and family gatherings
- 25% - Local events/festivals

Source: 2024 Day Visitor Study conducted by Downs & St. Germain.



# SPACE INDUSTRY PERCEPTIONS

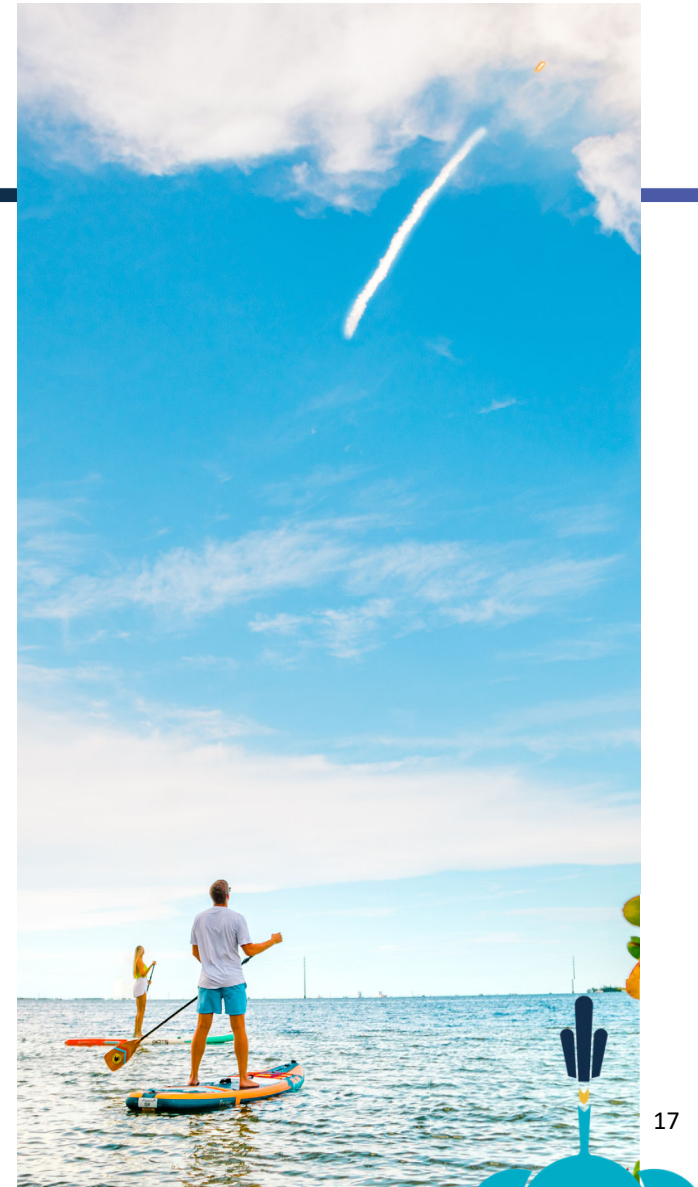




# SPACE INDUSTRY PERCEPTIONS

## Study conducted online with over 1,000 people:

- 72% of respondents were interested in the space industry and exploration
- Words used to describe the space industry included: exciting, futuristic, innovative, and visionary
- Cape Canaveral (47%) and Houston (38%) are most associated with leading space exploration, with Florida, Texas, California and DC being the top states
- 76% saw space exploration as important for the future of humanity
- 58% are supportive of private companies being involved in space exploration (NASA - 20%, SpaceX - 17%, and Boeing - 12% had the highest name recognition)
- 55% of respondents would find a space brand collaboration at least somewhat appealing
- 61% feel space marketing is somewhat or extremely effective at capturing consumer interest
- 62% would be more likely to buy brands that support space
- 65% would be more likely to visit a destination that features space in advertising



# VISITOR TRACKING STUDY: ROCKET LAUNCHES



# VISITOR TRACKING – ROCKET LAUNCHES

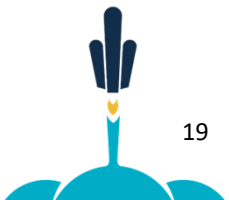
## PRE-VISIT: HOW THEY PLANNED THEIR TRIP

- 64% of visitors saw some kind of promotion from Space Coast before they came with 49% saying they visited a website
- SpaceCoastLaunches.com - 53%
- VisitSpaceCoast.com - 49%
- VisitFlorida.com - 27%
- TripAdvisor - 2%

## ADVERTISING SOURCES (WHERE THEY SAW US)

- Website - 49%
- Social media video - 40%
- Social media other - 36%
- Vacation planner - 33%
- News stories - 29%
- Billboard - 28%
- TV (streaming, other) - 23%
- YouTube - 22%
- Magazine - 15%
- Airport display - 15%
- Radio - 11%

Source: 2023 Economic Impact and Visitor Study conducted by Downs & St. Germain  
Visitor study conducted with over 2,500 overnight visitors in 2023. It analyzed only the 357 people who listed their primary reason for visiting the Space Coast to see a “rocket launch attempt.” The visitor may have come to the Space Coast and not actually seen a rocket launch due to scrubbed launches.





# VISITOR TRACKING – ROCKET LAUNCHES

## VISITOR DEMOGRAPHICS/PURPOSE OF TRIP

- Median age - 50; average annual household income \$103,000
- 41% fly, 59% drive
- 41% from Florida, 15% from the South, 11% from Northeast, 15% from Midwest, 9% from the West, and 10% International
- Top states outside of FL – Georgia, NY, Pennsylvania, California, North Carolina, Michigan, Wisconsin, Indiana, Missouri, Virginia, Ohio, South Carolina
- Average party size - 2.8
- 56% did not have children with them
- 45% came on vacation, 17% visiting family/friends
- Other activities besides watching a rocket launch - going to the beach (60%), sightseeing (58%), visiting KSC (48%), and shopping (42%).
- 40% did some kind of outdoor activity (hiking, biking, bird watching, etc.), 30% toured a space-related museum and 12% did some kind of watersport (surfing, boating, kayaking, water skiing, etc.).



# VISITOR TRACKING – ROCKET LAUNCHES

## ACCOMMODATIONS

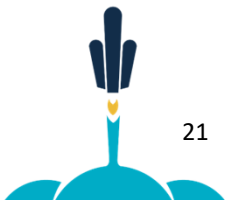
- 34% - Hotel/motel
- 20% - Stayed with family/friends
- 29% - Short-term rental
- 9% - RV/campground
- 3% - B&B

## VISITED

- 42% - Cocoa Beach/Cape Canaveral
- 23% - Titusville
- 9% - Melbourne Beach & South Beaches
- 6% - Melbourne
- 5% - Palm Bay

## LENGTH OF STAY/AVERAGE SPENDING

- Average length of stay is 4.8 nights
- Average spend per visitor is \$231 per day and \$1,107 per trip
- Average spending per party is \$3,101:
  - Lodging - 26.8%
  - Dining and beverages - 20%
  - Recreation and entertainment - 17.7%
  - Retail shopping - 16.2%
  - Gas - 4.6%
  - Local transportation - 2.1%
  - Other services - 2.7%



# VISITOR TRACKING – ROCKET LAUNCHES

## INTERNATIONAL

- International travelers represent 10% of the total
- Median age of 54
- Median household income of \$107,000
- Main countries of origin are Canada, UK, Germany

## OVERALL INTENT TO VISIT AGAIN

- 84% say they are very likely to return with 95% being likely or very likely to return
- 92% are likely or very likely to recommend to their friends and family
- 4% expect to visit again within 3 months, 21% within 6 months, and 21% within a year





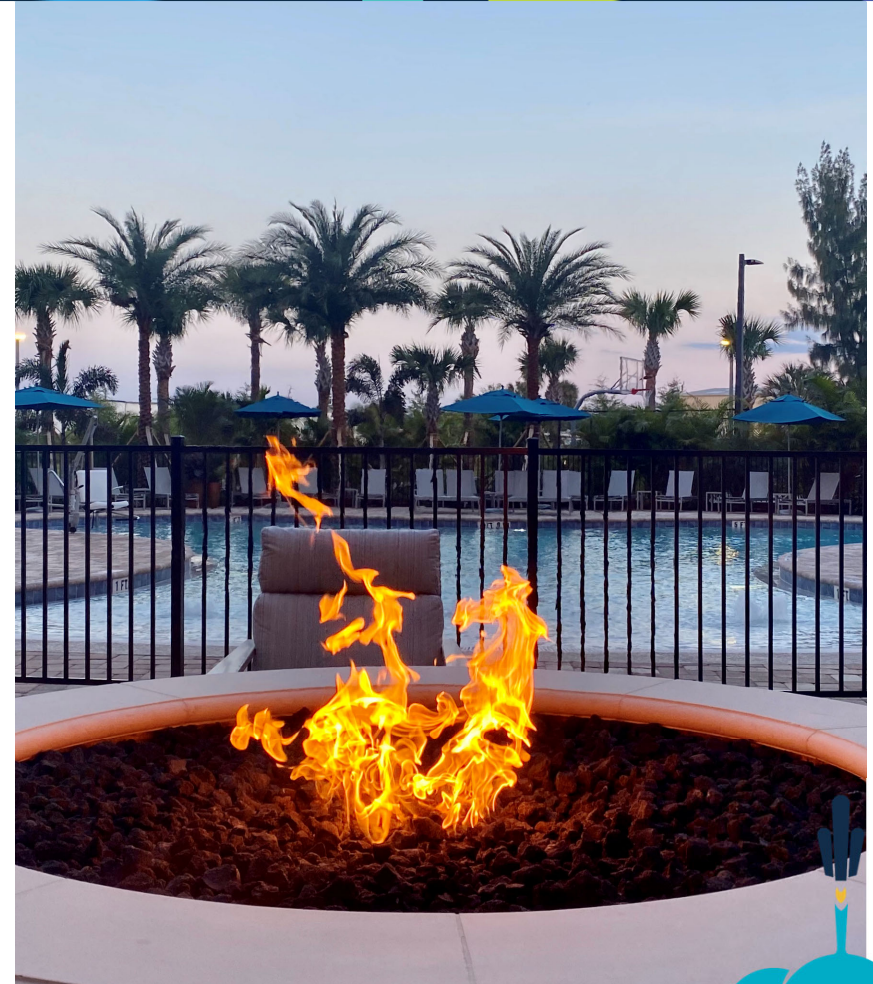
# **HOTELS & VACATION RENTALS**





# INVENTORY – ROOM NIGHT DEMAND

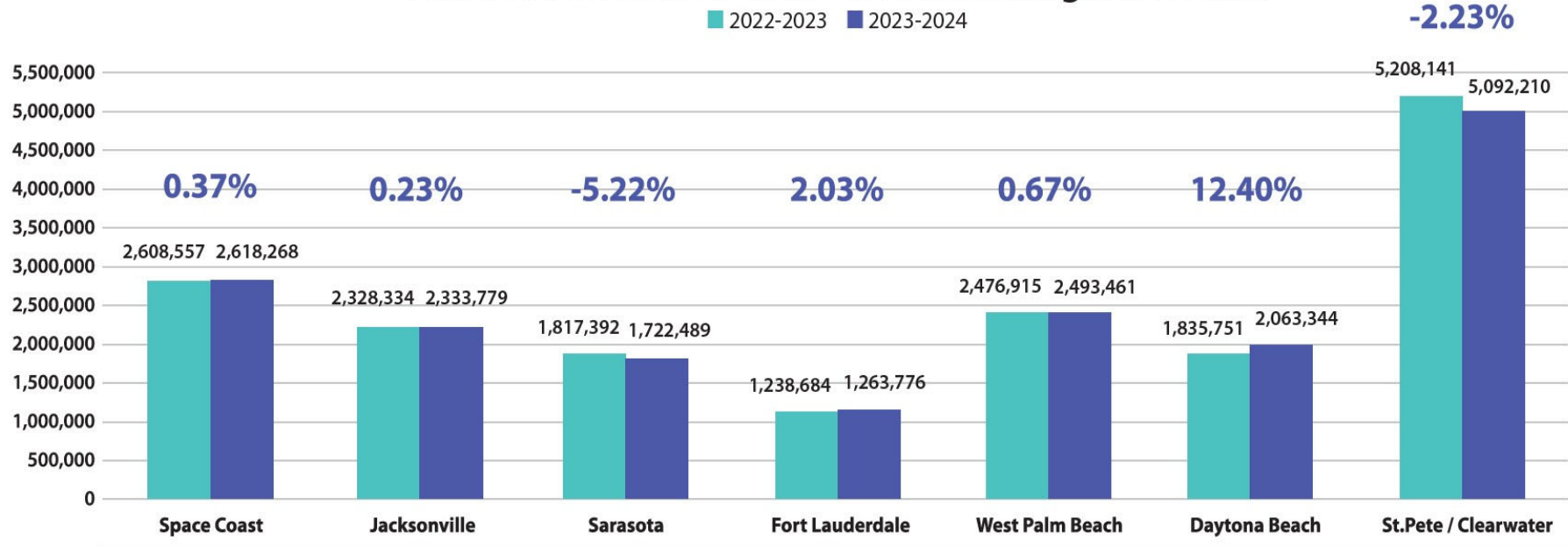
- Hotel inventory grew a little in 2024 with three new hotels added. In 2025, seven new properties are scheduled to open with more than 1,000 new rooms. Current inventory is 11,269 (June 2025). This is the first time inventory is over 11,000.
- Anticipated inventory growth in 2026 and 2027 is approximately 12 hotels slated to open – nearly 1,800 new rooms.
- In 2023, Room Night Demand (RND) was at 2.55 million hotel rooms rented, down from 2.7 million in 2022, mostly due to the International Palms being taken out of inventory.
- Room Night Demand in 2024 was 2.66 million – up 4.4% with the additional inventory that has been added.





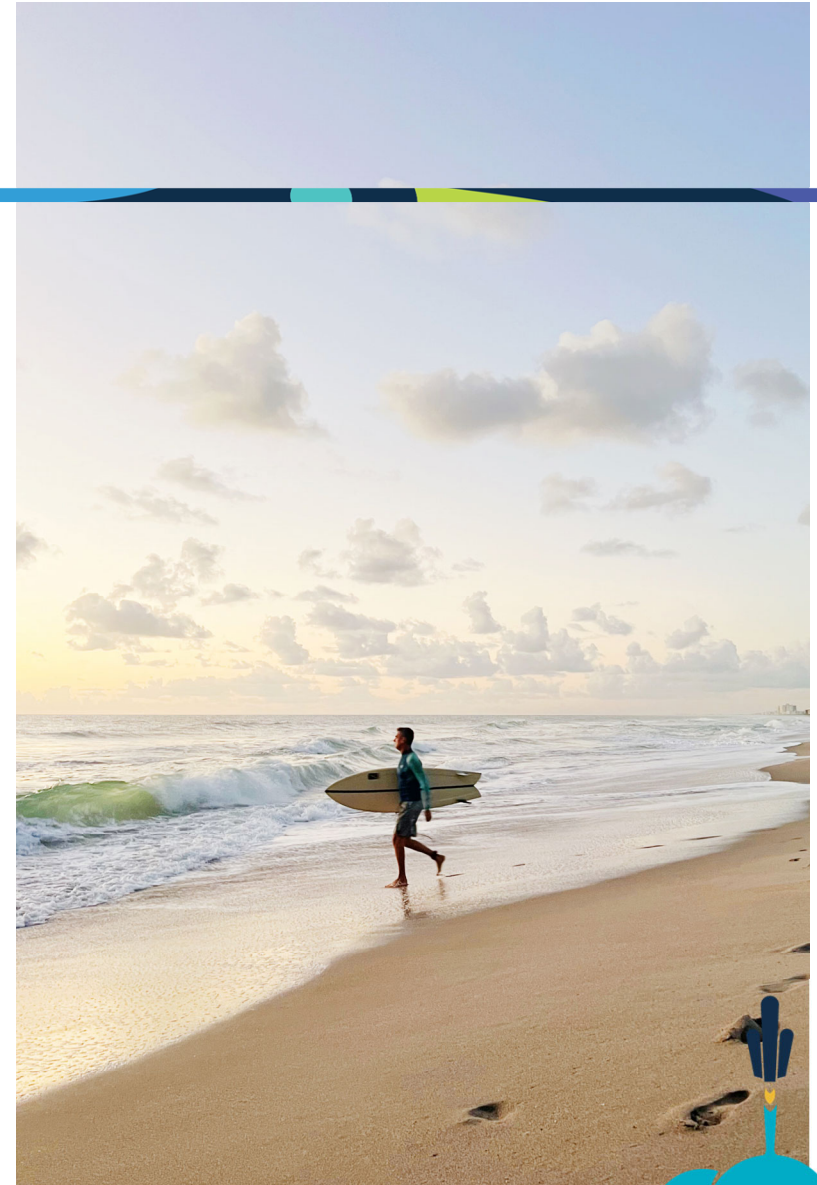
# INVENTORY – ROOM NIGHT DEMAND

## Fiscal 2022-2023 & 2023-2024 Room Night Demand



# VACATION RENTALS

- Short-term vacation rental inventory has grown incredibly since 2020. In 2021, we tracked 3,800 vacation rental units. Then in 2022, that number grew to over 6,800.
- Currently the inventory is over 9,000: 6,000 in Airbnb and 3,000 in VRBO (there is clearly an overlap in these two platforms, so we tend to focus on Airbnb numbers).
- Total vacation rental revenue was flat in 2024 over 2023, while average daily rate went up 4%, occupancy dropped 5%, dropping revenue per available room by 1%.
- We are beginning to see some flattening in the growth of inventory which may be a result of declining occupancy in this space. Additional pressure will be put on this market by the increase in hotel inventory.
- Vacation rentals still account for one third of TDT collections.





# STRATEGIC CONSIDERATIONS





# STRATEGIC CONSIDERATIONS

## INCREASE DESTINATION DEMAND FROM KEY SOURCE MARKETS (Domestic & International)

- Identify key source markets using Datafy population movement intelligence analysis.
- Conduct Return on Investment (ROI) analysis by market and adjust spending in markets to maximize results.
- Increase length of campaigns to influence shoulder season travel.
- Utilize proximity to theme parks, direct flight routes and cruise port to develop messaging that stands out from competitors.
- In partnership with existing agencies and vendors, continue to grow marketing, media outreach, and advisor education efforts in UK and select European Union countries. Assess Canadian travel sentiment to see if advertising is merited.

## CREATE FLEXIBLE PLANS TO RESPOND TO MARKET CONDITIONS

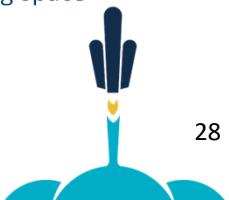
- Monitor market conditions in key areas.
- Work with agency media team to create agile campaign briefs and media implementation plans.
- Adapt target markets, campaign budget allocation and messaging as needed.

## OPTIMIZE EFFORTS WITH DATA-FIRST DECISIONS

- Utilize trackable digital products in conjunction with analytics platforms, to make data-driven decisions and optimize campaigns.
- Optimize vendor selection to the high performing platforms that measure direct impact of dollars spent.
- Analyze booking data and audience insights to identify and reach our primary audiences, improving ADR and RevPAR as a result.
- Conduct research studies including STR/short-term vacation rental reports, visitor spending analysis, and awareness studies.

## MAXIMIZE INDUSTRY RELATIONSHIPS TO AMPLIFY MESSAGES TO NEW AUDIENCES

- Educate consumers and travel agents on new cruise ships, new routes and growth at Port Canaveral to keep passengers staying in county.
- Work with Melbourne Orlando International Airport to support new domestic and international routes.
- Continue co-op marketing plan supporting TUI's flights to their Central Florida Hub at MLB.
- Coordinate joint sales missions to targeted markets with hotels and cruise lines.
- Develop meeting planner resources to support new meeting space inventory



# STRATEGIC CONSIDERATIONS

## TELL COMPELLING DESTINATION STORIES AND BUILD BRAND AMBASSADORS

- Host media familiarization (FAM) tours showcasing the unique features of the Space Coast.
- Develop rich story pitches for international, national and regional media outlets.
- Invite qualified content creators in market to showcase the destination through their lens and online platforms.
- Distribute quality destination content through social media platforms with images, blogs and short form video.
- Create personalized opportunities for visitor engagement with website itineraries and custom email preferences.
- Collect and engage with user generated content through Crowdriff.

## RAISE AWARENESS OF FLORIDA'S SPACE COAST WITH TRAVEL ADVISORS, TOUR OPERATORS, AND EVENT ORGANIZERS

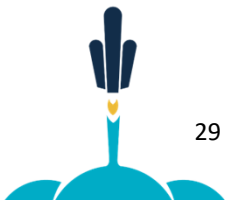
- Utilize remote and online education platforms to make advisor connections.
- Attend key in-person conferences.
- Coordinate and host travel advisors in market.
- Distribute new business leads to industry partners.
- Participate in sales mission trips with industry partners.
- Attend key sports conferences to develop new business leads.

## CONTINUE LONG-TERM PLANNING THAT HAS A POSITIVE IMPACT ON THE DESTINATION

- Identify and focus on our high value visitors who stay longer and contribute to positive impacts on beaches and waterways.
- Seek out opportunities to tell the story of the Space Coast's sustainability and eco-tourism efforts.

## BE A TRUSTED RESOURCE TO OUR COMMUNITY AND INDUSTRY

- Provide access to research reports, campaign results and market information.
- Conduct regular electronic messaging to update stakeholders on upcoming destination news, available resources, and important market updates.
- Host Sales Action Team meetings to collaborate with local industry members on future initiatives.





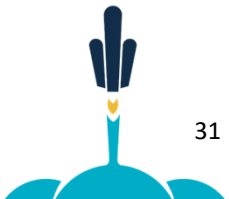
# CREATIVE OVERVIEW





# CREATIVE OVERVIEW

- District 2/Cocoa Beach desired a heavy billboard campaign which can be seen by the multiple creative executions. Melbourne, Titusville, and Palm Bay are also featured on billboards.
- There are a variety of digital creative executions for each municipality.
- New TV commercials/videos for Cocoa Beach and Port Canaveral are in production. A branding project is underway for Melbourne/Palm Bay and new TV and digital creative will be developed as a result. The Countdown commercial featuring all of the Space Coast will continue to run as it has received numerous awards.
- The “On Florida’s Space Coast” wordmark is still being used in all advertising.
- With growing consumer concern about the economy, including an affordability strategy in the marketing mix helps position the Space Coast as an accessible destination by highlighting value-driven experiences, competitive pricing, and budget-friendly options.
- Our campaigns have delivered high-impact, measurable results, and many have been recognized with industry awards for creativity and excellence in tourism marketing.



# BILLBOARDS





## BILLBOARDS



# BILLBOARDS



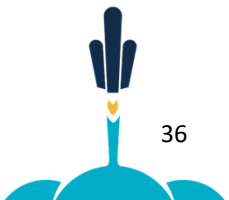
# BILLBOARDS



## BILLBOARDS



Space Coast  
FLORIDA





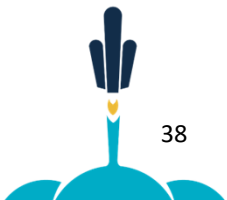
# BILLBOARDS



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Space Coast  
FLORIDA



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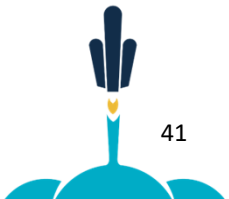




# BILLBOARDS



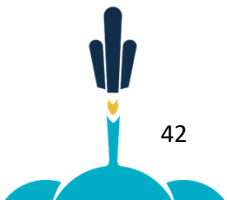
Space Coast  
FLORIDA



# BILLBOARDS



Space Coast  
FLORIDA



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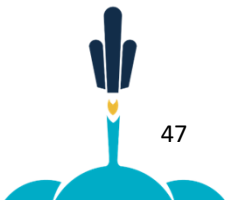
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Space Coast  
FLORIDA





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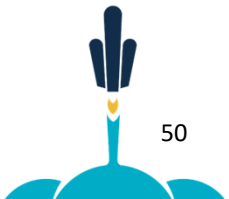
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Space Coast  
FLORIDA



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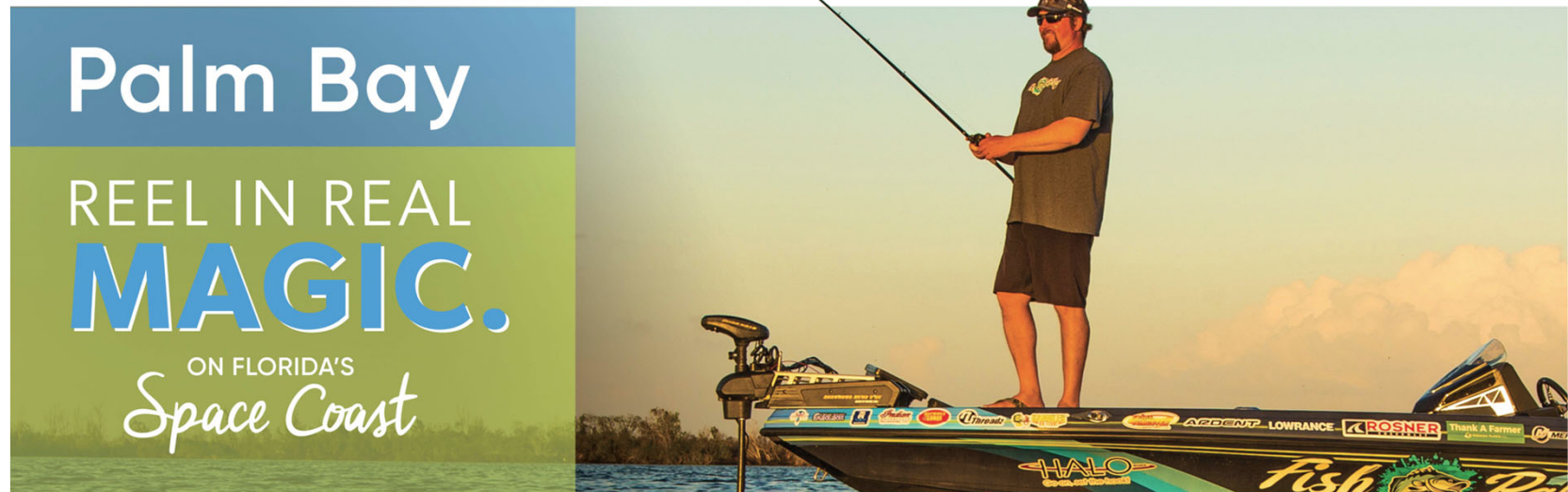
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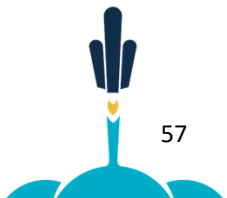
COCOA BEACH | MELBOURNE AND THE BEACHES | PALM BAY | TITUSVILLE

# DIGITAL ADS

## COCOA BEACH

The area's surf culture is at the heart of the Cocoa Beach brand. In contrast to its laid-back vibe, Cocoa Beach has long been associated with the space industry and its beaches remain some of the most popular places to witness a rocket launch.

Space Coast  
FLORIDA

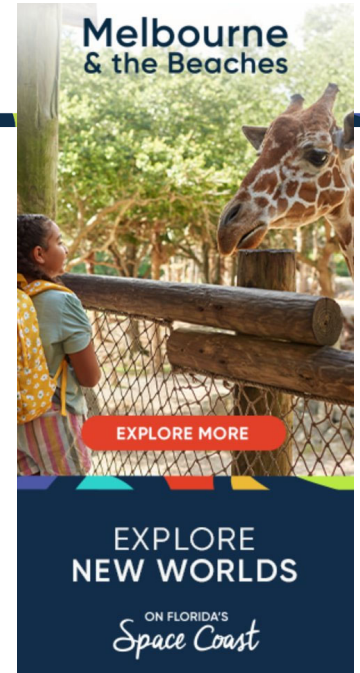
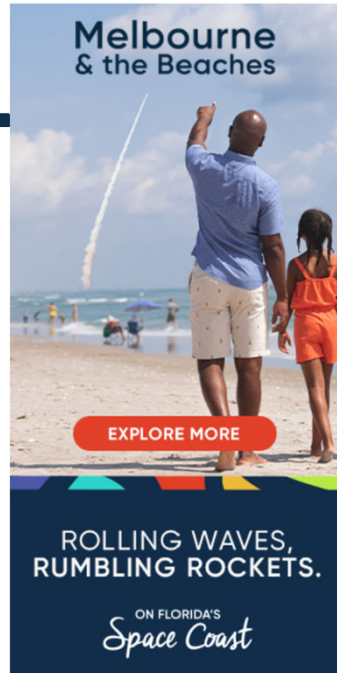


# DIGITAL ADS

## MELBOURNE & THE BEACHES

With the zoo, charming downtowns, the Archie Carr National Wildlife Refuge, and a popular arts district, Melbourne and the surrounding beaches offer a variety of activities for travelers with a broad range of interests.

Space Coast  
FLORIDA



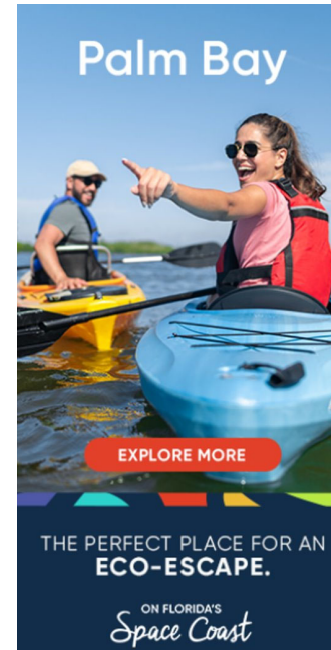
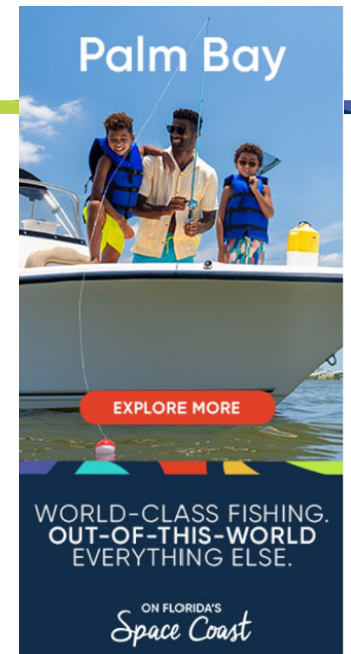
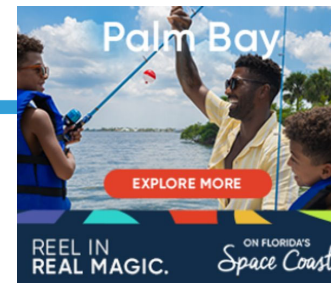
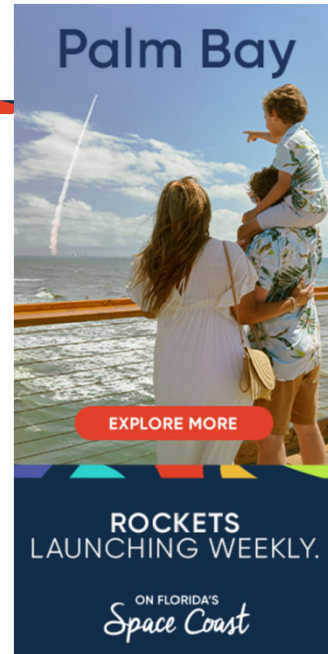


# DIGITAL ADS

## PALM BAY

The area's abundant parks, trails, and waterways make Palm Bay an oasis for fishing enthusiasts and nature lovers.

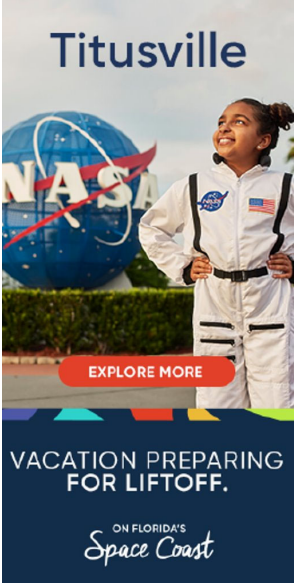
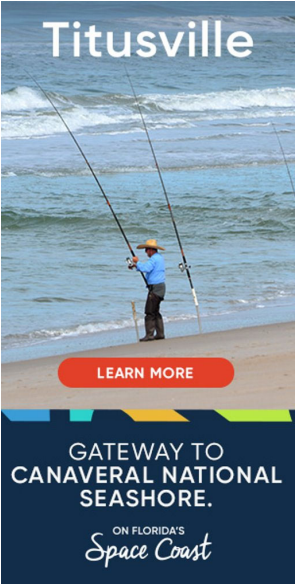
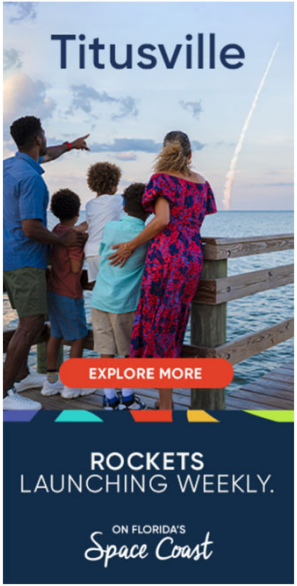
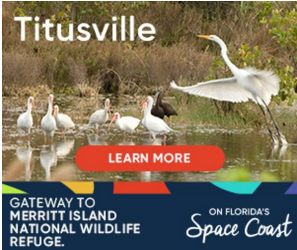
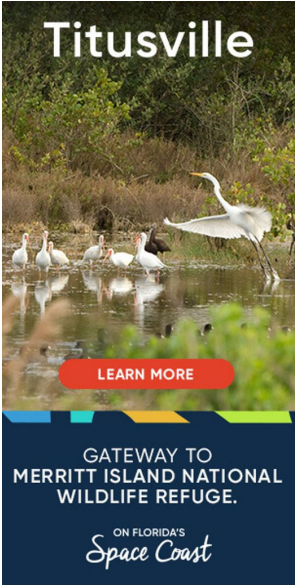
Space Coast  
FLORIDA



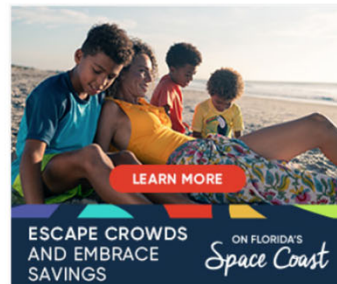
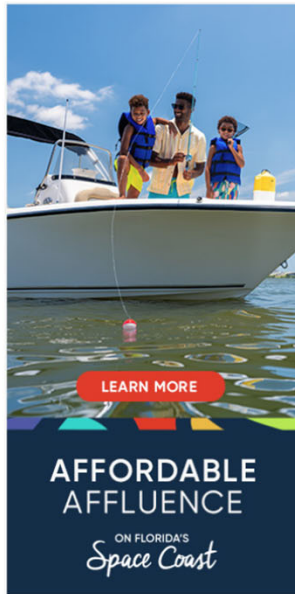
# DIGITAL ADS

## TITUSVILLE

Considered the gateway to the Space Coast, Titusville includes the Merritt Island National Wildlife Refuge, the Canaveral National Seashore, and the Kennedy Space Center.



# AFFORDABILITY MESSAGING



With travelers increasingly mindful of their spending, this additional messaging positions the Space Coast as an affordable, value-rich beach getaway—offering all the fun without the high price tag.

## HEADLINES

- Affordable Affluence
- See More for Less
- Escape Crowds and Embrace Savings
- Affordable Getaways Await



# TELEVISION ADS

## COCOA BEACH SPOT



There's magic in the waves.



It's why here on Cocoa Beach we greet the sunrise with wax in our hands



and boards in our laps.



Why time is told by the changing of the tides, not the ticking of clocks.



Whely the beach gives the same feeling of rebirth



each time.



The sun and surf don't care what you do



or where you're from,

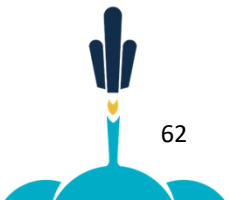


so we don't either.



All we ask is that you come as you are.

Space Coast  
FLORIDA



# TELEVISION ADS

## PORT CANAVERAL SPOT



Just like the water it connects us to,



Port Canaveral is constantly in motion.



Another constant?



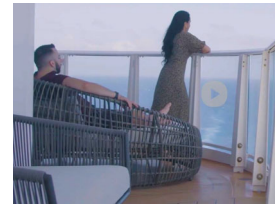
Encouraging visitors to experience something new.



Whether it's learning how to peel a shrimp while a rocket thunders above,



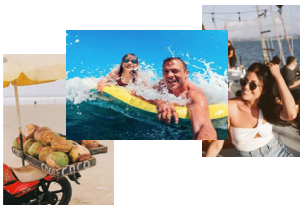
how to shuffle while out at sea,



or what a horizon looks like when it expands just a little bit more,



Port Canaveral has a way of showing



everybody a part of themselves they never knew existed.



So, no matter what you set your sights on, or how far your travels take you,

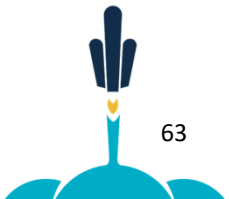


all of us on the Space Coast will be excited



to welcome you home to Port Canaveral.

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FLORIDA

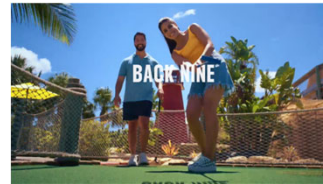


# TELEVISION ADS

## COUNTDOWN SPOT



10 seconds and counting.



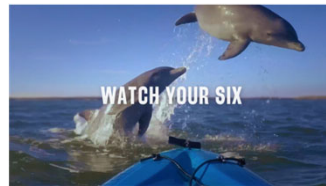
Nine.



Eight. Ignition sequence start.



Seven.



T-minus six.



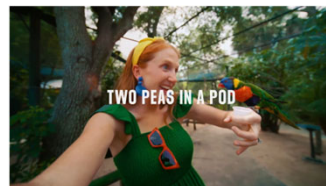
Five. All engines running.



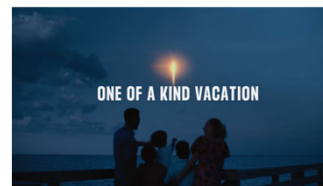
Four.



Three.



Two.

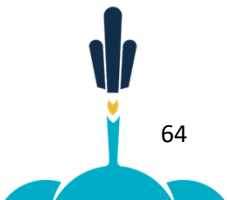


One.



Liftoff. We have a liftoff.

Space Coast  
FLORIDA





# VISITOR OVERVIEW



# WHO IS THE SPACE COAST VISITOR?



## TARGET AUDIENCES

- Adults 35-54+
- HHI \$100k+
  - Subsegment of higher affluent households (\$150k+)
- Propensity to travel with interests in beach, space, nature, Florida
- Cruise intenders
- Families with children in the household
- Households without children
  - Early career adults 25-34
  - Active retirees, 60+
- Multi-generational groups

## TARGET MARKETS

- Florida markets: Miami/Fort Lauderdale, Orlando, Tampa/St. Pete, West Palm Beach
- Out of state markets: Atlanta, Charlotte, New York, Boston, Washington DC, Philadelphia, Chicago
- Airline partnership markets: Allentown, Minneapolis, new markets to be announced
- International markets: UK, Ireland, European Union (as appropriate), Canada (possibly skip for 2026)

Note: Ongoing monitoring of economic conditions will continue into next year, and we will be flexible in adjusting, removing or adding to our target markets and re-allocating budget as needed to respond appropriately and maximize spending.

# TOP SOURCE MARKETS

## Out-of-State Source Markets: Visited Brevard

## Share of Total 2024

1	Atlanta	3.86%
2	New York	3.10%
3	Washington-DC	1.72%
4	Charlotte	1.59%
5	Philadelphia	1.44%
6	Chicago	1.33%
7	Boston -Manchester	0.98%
8	Detroit	0.96%
9	Dallas-Ft. Worth	0.93%
9	Raleigh-Durham-Fayetteville	0.93%
11	Greenville-Spartan-Asheville	0.90%
12	Nashville	0.75%
12	Indianapolis	0.75%
14	Los Angeles	0.74%
15	Savannah	0.73%
16	Houston	0.70%
16	Cleveland-Akron-Canton	0.70%
18	Minneapolis-St. Paul	0.67%
19	Columbus-OH	0.59%
19	St. Louis	0.59%

## Florida Source Markets: Visited Brevard

## Share of Total 2024

1	Orlando-Daytona Beach	15.40%
2	West Palm Beach-Ft. Pierce	10.10%
3	Tampa/St. Pete-Sarasota	9.37%
4	Miami-Ft. Lauderdale	7.34%
5	Jacksonville	5.23%
6	Ft. Myers-Naples	1.12%
7	Gainesville	0.92%
8	Tallahassee-Thomasville	0.88%
9	Mobile-Pensacola-Ft Walton	0.55%
10	Panama City	0.33%

## International Source Markets\*

1	Canada	1,290,000
2	United Kingdom	908,000
3	Germany	127,000
4	Ireland	NA

\*International numbers reflect Orlando arrivals for 2024

\*\*Highlighted markets had marketing spend in 2024

\*\*\* Red highlighted markets indicate unfunded that have potential

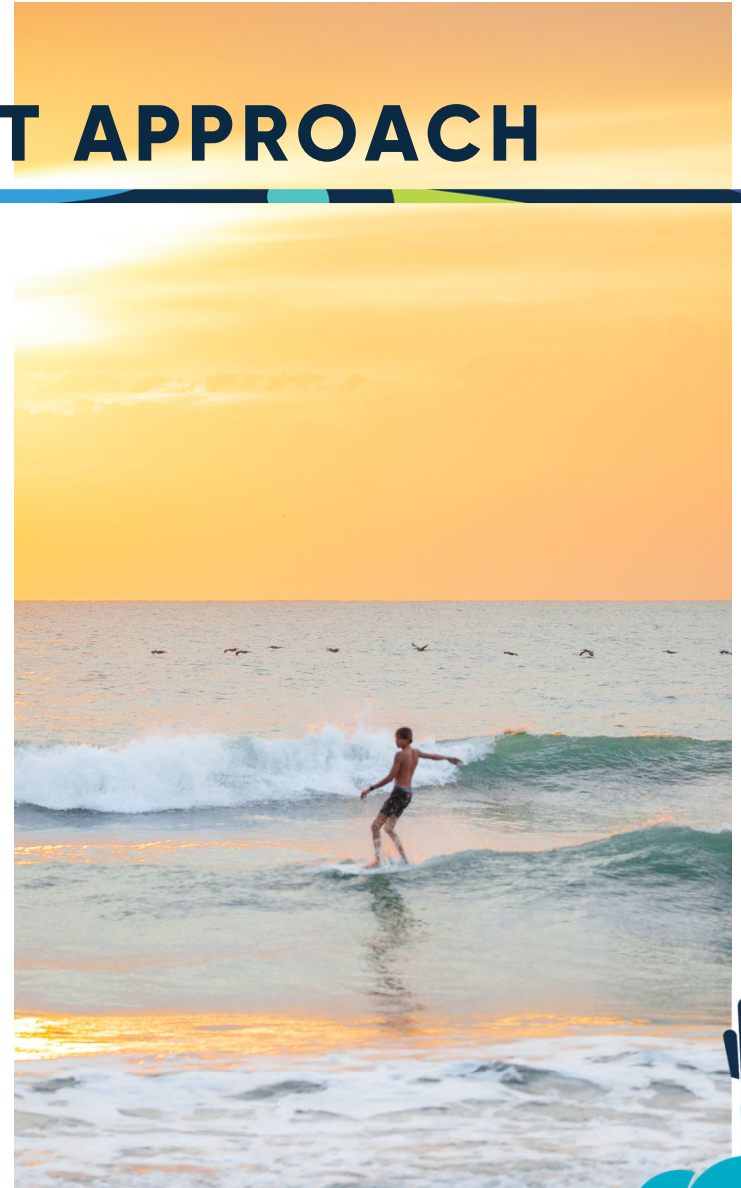


# DIGITAL/STREAMING-FIRST APPROACH

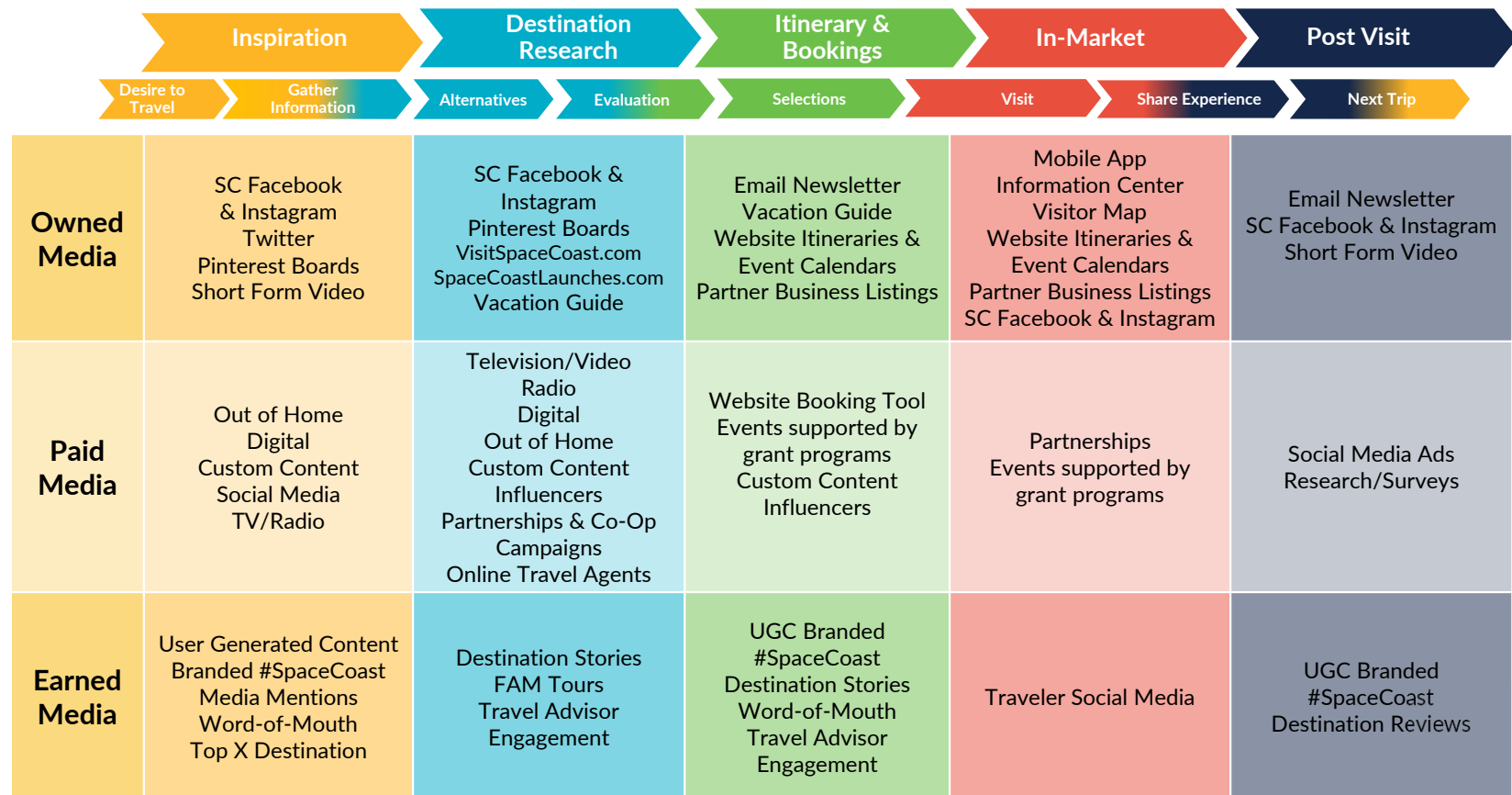
The Space Coast visitor does above average online research on social media and travel sites before making a vacation decision. They seek recommendations from trusted people in their circle of influence, they own multiple types of technology and still utilize some traditional media; however, they are increasingly switching to consuming media in new formats allowing them to access content on demand (ex. streaming).

By using a digital and streaming first approach to media placement, our plan identifies the target audience first and allows us to reach them with messages wherever they are and then follow them through their planning journey. Utilizing advanced solutions allows the Space Coast to be competitive, maximize our advertising dollars, and develop a deeper understanding of our visitor.

Source: SCOT Visitor Study



# VACATION PLANNING JOURNEY





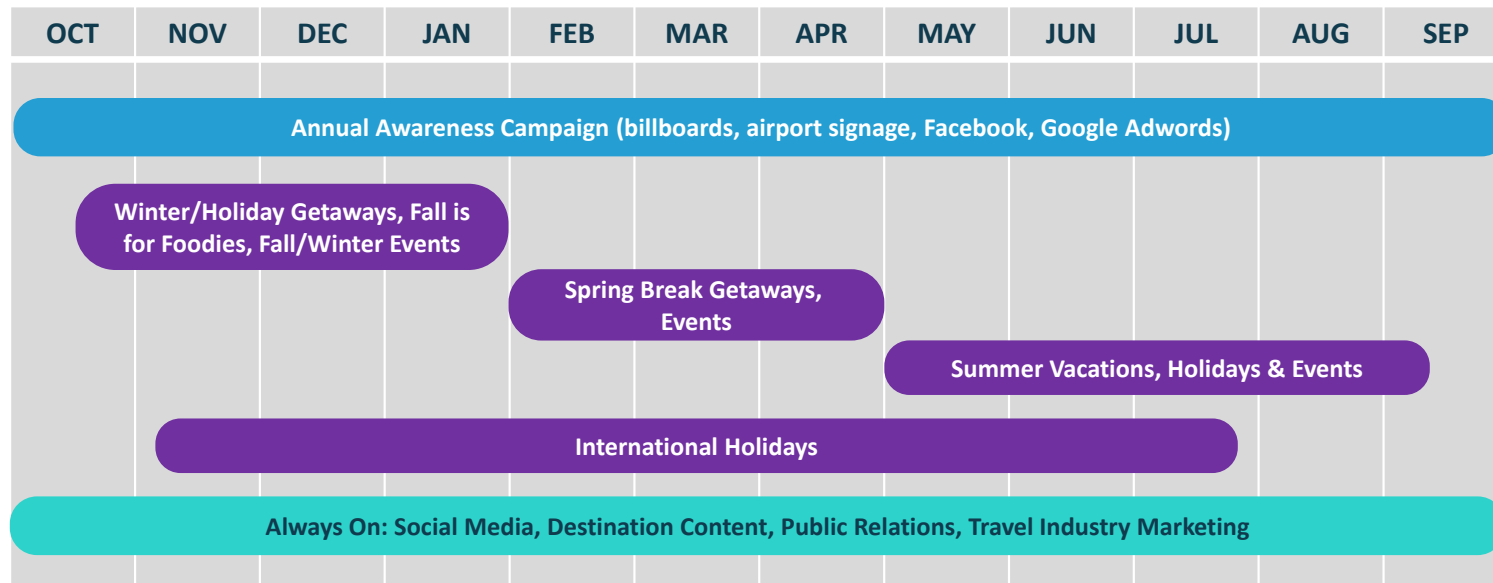
# IMPLEMENTATION





# MESSAGING CALENDAR

Featuring a targeted mix of always-on branding awareness messages, conversion-focused seasonal advertising and specialty niche campaigns



# ADVERTISING CAMPAIGN OVERVIEWS

CREATE ADVERTISING CAMPAIGNS THAT INCREASE DESTINATION DEMAND AND INFLUENCE OVERNIGHT STAYS FROM KEY MARKETS

## ANNUAL CAMPAIGN: \$2,354,000

Brand awareness placements such as out of home (billboards), airport signage, search keywords and paid social media.

## SEASONAL CAMPAIGNS: \$5,635,441

Layered media placements to raise awareness, generate leads, and increase conversions. Includes TV and streaming, radio and audio, programmatic digital, custom content outlets, paid social media.

- Estimated budget by season: Fall/Winter: \$1,115,441  
Spring: \$1,720,000  
Summer: \$2,800,000
- Marketing Support Program (MSP) will support events **(\$740,000)**.
- Note: In FY 2024-25 the Fall campaign shifted to a Fall/Winter campaign – promoting travel from November to January with good success in uplifting January travel. This will occur again in FY 2025-26.
- Ongoing monitoring of economic conditions will continue throughout the year, and we will be flexible in adjusting, removing or adding to our target markets and re-allocating budget as needed to respond appropriately and maximize spending.

# ADVERTISING PLATFORMS AND VENDORS

## OUT-OF-HOME (BILLBOARDS, AIRPORT SIGNAGE, BROCHURE DISTRIBUTION)

Raise awareness and leverage targeting of travelers through high traffic routes, baggage claim, and rental car locations. Also, possible construction of a permanent, rocket-shaped board at Orlando Airport and SR 528, and wrapping a Brightline train.

Potential vendors: Clear Channel, Lamar, Outfront, BeSeen, GSTV, JCDecaux (Orlando International Airport), Murphy Media Group, Consult McIntyre, LLC, Orlando International Airport - MCO, FPIS, Kenney Communications, White Clouds, Atomic Props, Kern Studios, Outdoor Image, Moss Holding, All Service Graphics, Brightline, Vomela Transportation Group, Florida Warehouse and Storage, International Minute Press, PakMail, Saddle Creek Logistic Services, Wilkins Media, Creating Margin

## RADIO (DIGITAL, TRADITIONAL, PODCASTS)

Connect with highly engaged targeted audience where they are consuming audio.

Potential vendors: Pandora, Spotify, NPR, iHeart Radio

## DIGITAL ADVERTISING (PROGRAMMATIC DISPLAY, SEARCH, VIDEO)

Meet the targeted potential visitor online with the right message to match where they are in the planning process. Continually optimizing to drive bookings.

Potential vendors: Google (Alphabet), Adara, Conversant, Sojern, TravelSpike, Nativo, Dstillery, Expedia, Undertone, Illumin, Causal IQ, GumGum, Accuweather, Foursquare, Journera, Priceline, A.ki, Groundtruth, Simpli.fi, AI Digital

## PAID SOCIAL MEDIA

Inspire the visitor, engage with them throughout their planning process and drive leads for more information.

Potential vendors: Facebook/Instagram (Meta), YouTube

## VIDEO (CABLE/CONNECTED TV/STREAMING/SOCIAL)

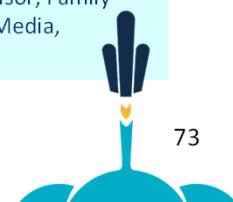
Increase awareness and target prospective travelers with high impact creative.

Potential vendors: Comcast, Spectrum, Magnite (SpotX), Hulu, Visit Florida Co-Ops

## SPECIALTY OUTLETS & CUSTOM CONTENT PROVIDERS

Generate relevant long form custom editorial, video & social content to engage the consumer and drive quality leads.

Potential vendors: Lonely Planet, Smithsonian, Conde Nast, AAA, Visit Florida, Orlando Magazine, Parent Magazine, Atlanta Parent, Space Coast Fun Guide/Belden Communications, Graft UK Guide, Misty Wells Let's Take It Outside, JT Kenney Fishing, Matador Network, RV There Yet, Florida Golf Guide, Fish Florida, Major League Fishing, LocalIQ, Orlando Sentinel, Student Group Travel, Atlas Obscura, National Geographic, Outcoast, Places to Love, Travel Weekly, Mommy Poppins, Blair Wiggins Outdoors MPI-McCabe, Bill Dance Outdoors, TravelZoo, TripAdvisor, Family Travel with Colleen Kelly, Tinybeans, Maverick Multimedia, Destination Media, McCabe Productions/RV There Yet, Miles Partnership





# PERFORMANCE METRICS

PERFORMANCE METRICS	2025-2026
Tourist Development Tax Growth	3.80%
Tourist Development Tax Collection	\$27,000,000
Social Media Engagement (Paid)	3,000,000
Facebook: Brand Awareness Digital Impressions (Paid)	40,000,000
Google: Brand Awareness (Paid)	40,000,000
Digital Advertising Impressions (Paid)	200,000,000
Connected & Cable TV Impressions (Paid)	60,000,000
Space Coast Launches App Downloads	100,000
Social Media Engagement (Organic)	500,000
Email Lead Generation	10,000
Email Open Rate	15%
Email Click-Through Rate	5%
Vacation Planner Views & Website Requests	20,000
Website Total Users	2,500,000
Website Average Session Duration	1:50
Billboard Impressions	1,600,000,000
Earned Media Value	\$40,000,000
Media ROI	600 to 1

## ASSESS CAMPAIGN PERFORMANCE

- Prioritize tactics that can be measured and utilize results to improve efforts to reach potential visitors.
- Utilize comprehensive suite of resources to measure performance indicators and results:
  - Market growth reports (Room Night Demand, RevPAR, Tourism Development Tax Growth)
  - Booking data reported through Adara and Expedia
  - Direct advertising influence as reported by survey respondents
  - Measurement goals set for marketing key performance indicators
  - Competitor and trend analysis via market research, leading industry organizations

**Possible Vendors:** Datorama/Salesforce, Adara, Google Analytics, Meta, Datafy, Expedia, SEMRush, Downs & St. Germain

# EARNED & OWNED MEDIA

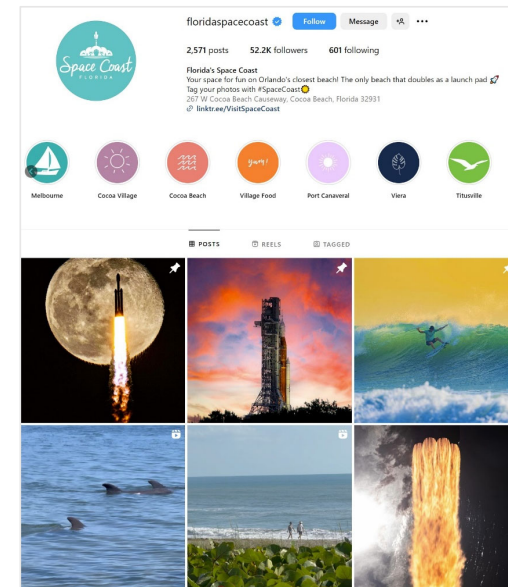


# CREATIVE, PRODUCTION, CONTENT

INSPIRE AND ENGAGE WITH VISITORS FROM AROUND THE WORLD.  
PROVIDE USEFUL, ACCURATE, TIMELY DESTINATION INFORMATION  
TO VISITORS

BUDGET \$1,270,000

- Create inspiring and engaging assets with mixed media for distribution across multiple channels.
- Develop fun social media promotions to drive engagement (scavenger hunts, post a picture, win prizes at VIC)
- Collect and curate user generated content with Crowdriff.
- Foster destination champions by participating in online community conversations with #SpaceCoast.
- Work with content creators to enhance destination footprint online.
- Utilize trending topics and performance metrics to refine content strategy.
- Grow interest-based consumer email list and create high quality content delivered through automated funnels.



**Possible Vendors:** &Barr, Current, Concepta, Crowdriff, Loomly, Cassie Fischer, Amazon Web Services, Flywheel, Cloudflare, GoDaddy, Adobe, Campaign Monitor, Issuu, Proxi, ASG, Tinify, Keeper, Influencekit, Amplitude, Pendo, aRes, Eternal Fire Media, WordPress, Space Coast Advertising, Carine Carmack, All Media Marketing, Geiger, Robert Mutchler, NPI Productions, Pioneer-Coastal Lithographic, Steven Madow, Adquia, Brandfolder, Bynder, Canto, Nathan Azevedo



# SOCIAL MEDIA, WEBSITE

- Website and application hosting and domain management services.
- Ongoing website search engine optimizations and accessibility efforts.
- Creative design, advertising production, print photography, TV, video, and radio commercial production, agency support.
- Connect to community stakeholders through regular industry newsletter.
- Connect offline content with online resources – ex., use of QR codes and trackable links in the guide.
- Maintain SpaceCoastTourism.org business site to host business-to-business resources.

**Possible Vendors:** On the Spot Media, Shutterstock, Getty Images, iStock, Pond5, Envato Elements, Giles Partington (Gesture Digital), Christian Stewart, Oxenfree Film & Motion, Adam Showen (Dog Water Films), Rich Johnson (Spectacle Photo), Nick Pecori, Diamond View Studios, Indie Atlantic Films, Scott Cook, Scott Harben, John Deeb, Diamond Model and Talent Agency, Professionally Pretty, Level Talent Group, BMG Global, Sprout Kids Agency, Stephanie Mazzeo, Tracie Cervero, Kellie Lynn Dreher, Ana Crane, Mary Cucci (Word Charmers), Bulletproof Proofing, Retouchup.com, Amazon, Target, Walmart, Amy Malizia, AVISPL, Erin McGrath (Creating Margin), Stape.io, Vimeo, Pantheon, Amazon Web Services, Cloudflare, Cookieeeyes, GoDaddy, Basecamp, Google Cloud, The Events Calendar, Semrush, BCM, AdGenuity



# ARTIFICIAL INTELLIGENCE

- Artificial Intelligence (AI) is seeing significant growth in consumer adoption, and many are now using AI to research and plan their travels.
- Our SEO strategy ensures our content is easily discoverable by traditional search engines and we are beginning to implement Agent Engine Optimization (AEO) strategies to ensure our presence in that growing space.
- There is an opportunity to further enhance the content on our website with formatting and information optimized for visibility and usability by AI technologies.
- We are exploring some of the AI integrations currently provided within our marketing technology stack to enhance personalization, optimize campaign performance, and streamline data-driven decisions.



# PUBLIC RELATIONS AND FILM

**GENERATE POSITIVE EARNED MEDIA FOR THE DESTINATION**  
**BUDGET: \$250,000**

## **Public Relations Initiatives**

- Use beach, space, cruise, and nature to drive year-round local, regional, national, and international outreach and coverage.
- Host content creator and media familiarization tours (FAMs) in market to showcase new experiences, seasonal events, and unique experiences.
- Inspire prospective travelers with rich storytelling aligned with key marketing messages.
- Leverage the number of launches for media stories and position office as Tourism Office for Space.

## **Space Coast Film Commission**

- Review and file film permits for Brevard County. Assists filmmakers in securing locations, connecting with County/Municipality services, and adhering to local ordinances.
- Works to attract productions to the area to bring revenue and increase awareness of the Space Coast. Encourages film fans to visit and experience the destination in person.



**Possible Vendors:** Butin PR, Visit Florida, Film Florida



# ADDITIONAL MARKETING ACTIVITIES

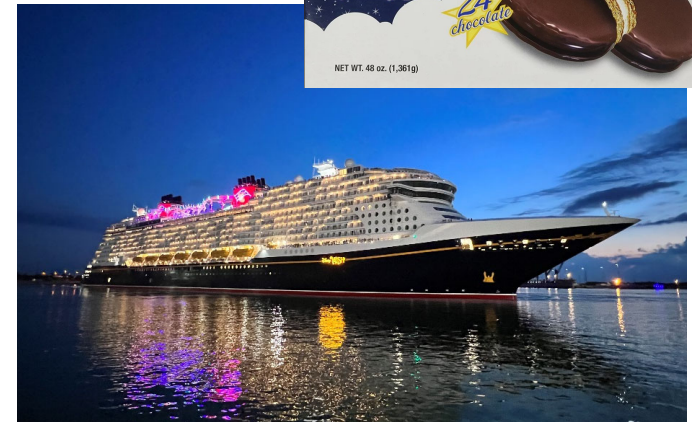


# PARTNERSHIPS/PROMOTIONS

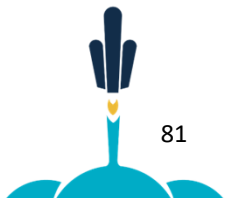
**MAXIMIZE RELATIONSHIPS AND AMPLIFY DESTINATION  
MESSAGE TO NEW AUDIENCES  
BUDGET: \$200,000**

- Moon Pie: Brand partnership with third party agency to promote Moon Pie and Space Coast in Southeast grocery stores.
- Port Canaveral: Support increased cruise demand and drive overnight stays pre- and post-cruise; develop new creative to support.
- Melbourne Orlando International Airport (MLB): Support increased air service growth with new markets and drive demand from direct service markets.
- Chambers of Commerce: Support efforts to educate the visitor on what to do while in market, lengthen their stays. Promote the area as a great place to live, work, and play.
- Economic Development Commission (EDC): Continue work with Mission Space Coast initiative to support the unified brand and set our region apart for business, talent attraction and retention, in addition to tourism. Plus, continue partnership on Launches & Lagers program.

*Space Coast*  
FLORIDA



**Possible Vendors:** MLB, Space Coast EDC, Chambers of Commerce (Titusville, Palm Bay, Melbourne, Cocoa Beach), Port Canaveral, Royal Caribbean, Carnival, Norwegian, MSC, Allegiant Airways, Sun Country Airlines, Delta Airlines, American Airlines, Cocoa Beach Hotel & Lodging Association, Viera Company, Visit Orlando, Delaware North, MediaOne



# SPORTS

## INCREASE AWARENESS OF FLORIDA'S SPACE COAST AS A TOP DESTINATION FOR SPORTS TEAMS AND COMPETITION EVENTS

BUDGET: \$60,000

### Administer Support Programs

- Support sporting events and competitions to reach national and regional audiences and increase overnight stays.
- Award qualified events with Marketing Support Program.
- Events that reach a minimum of 400 room nights can get up to \$25,000 in Marketing Support funding or reimbursement for event expenses.

### Event Promotion/Sponsorship

- Work with event planners to integrate event messaging into appropriate marketing outlets and sponsor where appropriate.
- Identify and pursue sports marketing and competition opportunities that generate economic impact for Brevard County.

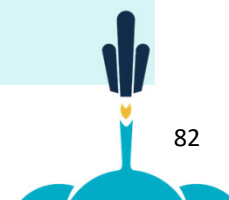
### Exhibit and Conduct Meetings at Industry Shows

- Sports ETA, FSF Annual Summit, Dad Vail Regatta, Intercollegiate Women's Lacrosse, National Fastpitch Coaches, American Baseball Coaches

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FLORIDA



**Possible Vendors:** USSSA, NCAA, Inside Pitch (ABCA), Fastpitch Delivery (NFCA), AVCA Magazine, US Lacrosse, Big Time Softball, Due North Media, Sunshine Sports Council, Florida Sports Foundation, TEAMS, US Sports Congress, US Rowing, Jefferson Dad Vail Regatta, Brevard County Parks & Rec, National Recreation and Park Association, Florida Recreation and Park Association, Florida High School Athletic Association, National Federation of State High School Associations, Amateur Athletic Union, The Esports Journal, Intercollegiate Women's Lacrosse Coaches Association, National Junior College Athletic Association, Sunshine State Conference, National Association of Intercollegiate Athletics, Playeasy, Great Scott Productions, Maverick/Space Coast Daily, Sports Destination Management, Play On, Inc., Sports ETA, Seamans Media, Row2K, Rowing News, 4Imprint, Boombah, Overnight Prints, SEQL, Team IP





# SPORTS



ON FLORIDA'S  
*Space Coast*

**SCORE BIG ON THE SPACE COAST!**  
Host your sporting event here.

[LEARN MORE](#)



ON FLORIDA'S  
*Space Coast*

**PLAY WHERE THE ROCKETS PLAY.  
LACROSSE ON THE SPACE COAST.**  
Host your sporting event here.

[LEARN MORE](#)



ON FLORIDA'S  
*Space Coast*

**ROW TO VICTORY ON  
THE SPACE COAST!**  
Host your sporting event here.

[LEARN MORE](#)

**Possible Event Organizers:** Central Brevard Soccer, Inc., Eastern Florida State College, American Junior Golf Assoc., Eastern Surfing Assoc., Space Coast United Soccer Club, Canales Legacy Unlimited, Columbia University Women's Golf, National Kidney Foundation of FL, Softball Magazine, Inc., Beach 'N Boards Fest, LLC, American Cancer Society, Inc., Space Coast Spring Training, Perfect Game Baseball, Ripken Baseball, Prep Baseball Tournaments, Prep Baseball Report Baseball, DS Sports Events, IBC Baseball, Triple Crown Baseball, RussMatt Baseball, United Soccer League, Smooth Running, LLC, National Women's Soccer League, Brevard Soccer Academy, Titusville Soccer Club, Brevard Soccer Club, Florida Youth Soccer Youth Association, United States Soccer Federation, United States Fastpitch Association, Florida Tech Softball, HBCU Invitational Softball, International Senior Softball Association, Florida Tech Lacrosse, Florida Travel Lacrosse League, Brevard Bulls Basketball, NCAA and member institutions, NJCAA and member institutions, C1N, Taylored Athletes Basketball, American Basketball Association, Florida Sunblazers Basketball, Dynasty Basketball, Youth Basketball of America, University of Louisville Women's Golf, College Hockey South, Florida Tech Hockey, Florida Tech eSports, Florida Tech, Space Force Marathon, Eastern Surfing Association, FIRST Robotics, USA Ultimate, Amateur Athletic Union, Brevard Public Schools, Professional Disc Golf Association, United Flag Football League, Cape Coast Volleyball Club, Sebastian River Rowing, Florida Tech Rowing, Space Coast Crew, United States Tennis Association, Sunshine State Conference, Florida Sports Foundation, Florida High School Association, Amateur Athletic Union, Intercollegiate Women's Lacrosse Coaches Association, Rockledge Youth Football, Mid-Florida Football Conference, NAIA and member institutions, NCCAA and member institutions, NFHS, BCASCA Cricket, Viera Hawks Cricket Club

# INTERNATIONAL

## GROW MARKET BASE IN TARGETED INTERNATIONAL LOCATIONS BUDGET \$800,000

- Continue working with TUI to increase awareness of the Space Coast with the UK consumer.
- Conduct marketing campaign with key tour operator partner in Ireland.
- Utilize partners for international co-op advertising programs, agent training opportunities, and marketing placements.
- Contracted with Tricia Henson Consulting for International Representation by Rukhsana Timmis in the UK and the European Union.
- Look for public relations opportunities as presented.
- Conduct survey research to track results.
- Monitor Canada to determine if a campaign there would be effective.



**Possible Vendors:** BrandUSA/Miles Partnership, Visit Florida, TUI/Intercoaches, Sunwing/West Jet, Porter, Tricia Henson Consulting, Rogers Media, The Telegraph, KSCVC, Graft Multi Media

# TRAVEL INDUSTRY RELATIONS

## INCREASE VISIBILITY OF FLORIDA'S SPACE COAST AMONG TRAVEL ADVISORS AND TOUR OPERATORS

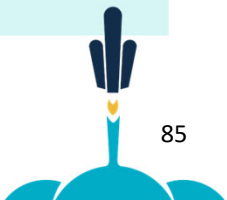
**BUDGET: \$45,000**

- Provide training webinars to travel advisors, online travel agency call centers, and tour operators.
- Expand and optimize the Travel Professionals webpage.
- Host travel advisor familiarization (FAM) tours for cruise planners, group planners and specialty travel markets by exposing them to our destination to increase their clients' stays and spend.
- Exhibit and conduct meetings at industry shows: Cruise360, Cruise World, Florida Huddle, American Society of Travel Agents (ASTA), Travel Advisors of the Mid-South (TAMS), IPW (when in Southeast), Peninsula Shows, Connect.
- Sales missions with cruise lines and area hotels.
- Travel Advisors destination monthly e-newsletter featuring what's new, changes at Port Canaveral, MLB, hotels and area attractions, and opportunities for increased commissions.

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FLORIDA



**Possible Vendors:** Visit Florida, ASTA, AAA, US Travel, CLIA, Northstar, Royal Caribbean International, Celebrity Cruises, Carnival Cruise Line, Travel Market Report, Vacation Access, Peninsula Shows, BTM Coaches, MPI.





# MEETINGS AND CONVENTIONS

## RAISE AWARENESS OF FLORIDA'S SPACE COAST WITH MEETING PLANNERS AND EVENT ORGANIZERS

- Support the local meetings market with additional website content and marketing the destination to the meetings and convention industry.
- Memberships in appropriate meeting planner associations and organizations.
- Conduct meeting planner familiarization (FAM) tours and sales blitzes in key markets.
- Develop and maintain online listings featuring detailed meeting venue information for area hotels with event and conference space.
- Continue joint efforts with the Sales Action Team to promote the Space Coast as a competitive venue for meetings and events.
- Continue utilizing Cvent to showcase the Space Coast's meeting spaces, respond to RFPs, and connect with planners searching for venues.



**Possible Vendors:** Cvent, Small Marketing Meetings, Northstar Meetings Group, Florida Society of Association Executives (FSAE), Hospitality Sales and Marketing Association International (HSMIAI), Conference Direct, Amex, Helms-Briscoe

# VISITOR INFORMATION CENTER

## PROVIDE DESTINATION INFORMATION AND PLANNING RESOURCES TO VISITORS

- Distribute destination collateral to visitors, including vacation planners, brochures, coupon, and maps.
- Fulfill requests for printed vacation planners via mail.
- Provide visitor assistance and trip planning support in person, by phone, and email.
- Serves as a liaison to hotels, attractions, restaurants, and other tourism partners for marketing initiatives and opportunities.
- Coordinates on-site showcasing and displays for local partners throughout the year.
- Representation at local tourism events.

**Possible Vendors:** PakMail, Metroclick, Allstar Janitorial, VK Realty, Reliable Window Cleaners, Stamps.com



# RESEARCH



**Possible Vendors:** STR, Downs & St. Germain Research, Datafy, Florida Tech, Key Data, Zartico, Adara, Arrivalist, Rockport Analytics, Tourism Economics, Wantstats Research

**USE RESEARCH TO MAXIMIZE DATA AND OPTIMIZE EFFORTS**  
**BUDGET: \$200,000**

## **Datafy:**

- Measures population movement around the destination
- Event attendance measurement
- Points of Interest foot traffic

## **Downs & St. Germain Research:**

- Conducts surveys such as Visitor Economic Impact and specific sub-segment Visitor Surveys (i.e. sports, rocket launches, etc.)
- Allows agile response to research questions

## **STR & Key Data Dashboard:**

- Resource providing market insights on hotel and vacation rentals



# OTHER BUDGETED ITEMS

## REMAINING ITEMS IN MARKETING BUDGET \$305,500

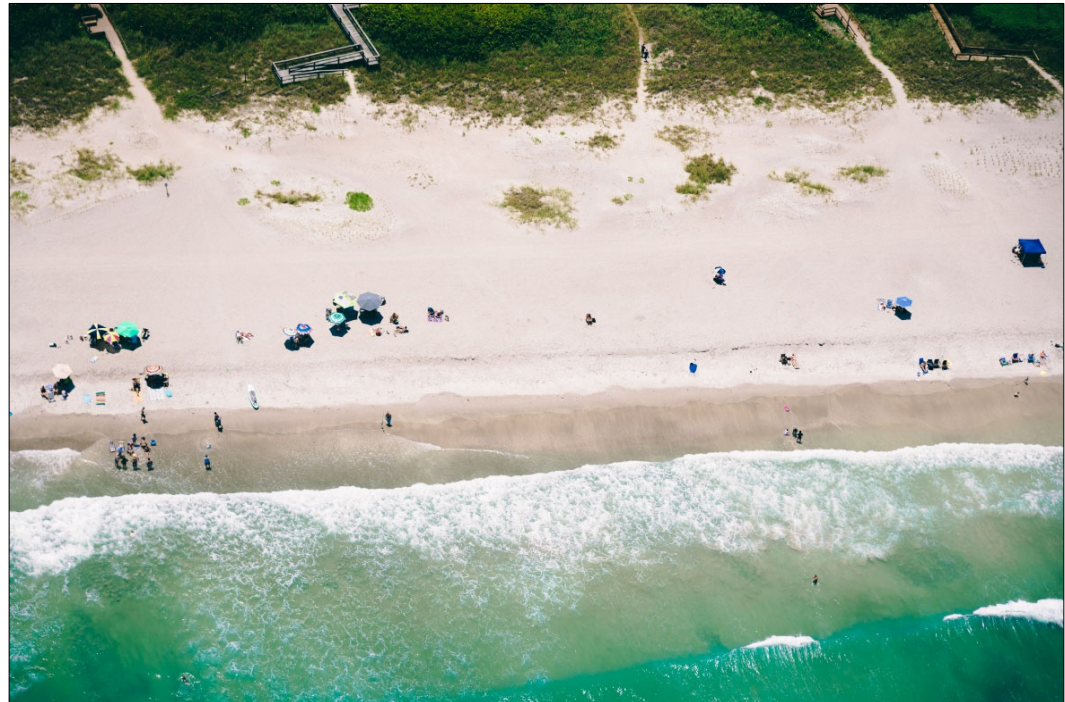
- Travel expenses (\$32,000)
- Memberships (\$30,500)
- Tax collector allocation (\$243,000)

Note: \$700,000 is being held back for anticipated reduction in Carry Forward.

And \$1,566,393 is being used for lifeguards, \$440,559 of which comes from Marketing.

**Total = \$14,126,334**

**Possible Vendors:** FADMO/Destinations Florida, Sportfishing, Visit Florida, Outdoor Writers, National Association of Sports Comm, Film Florida, FPRA, PRSA, Visit Orlando, LEAD, TTRA, ESTO, FHIA, US Travel Association





**SPACE COAST OFFICE OF TOURISM**

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