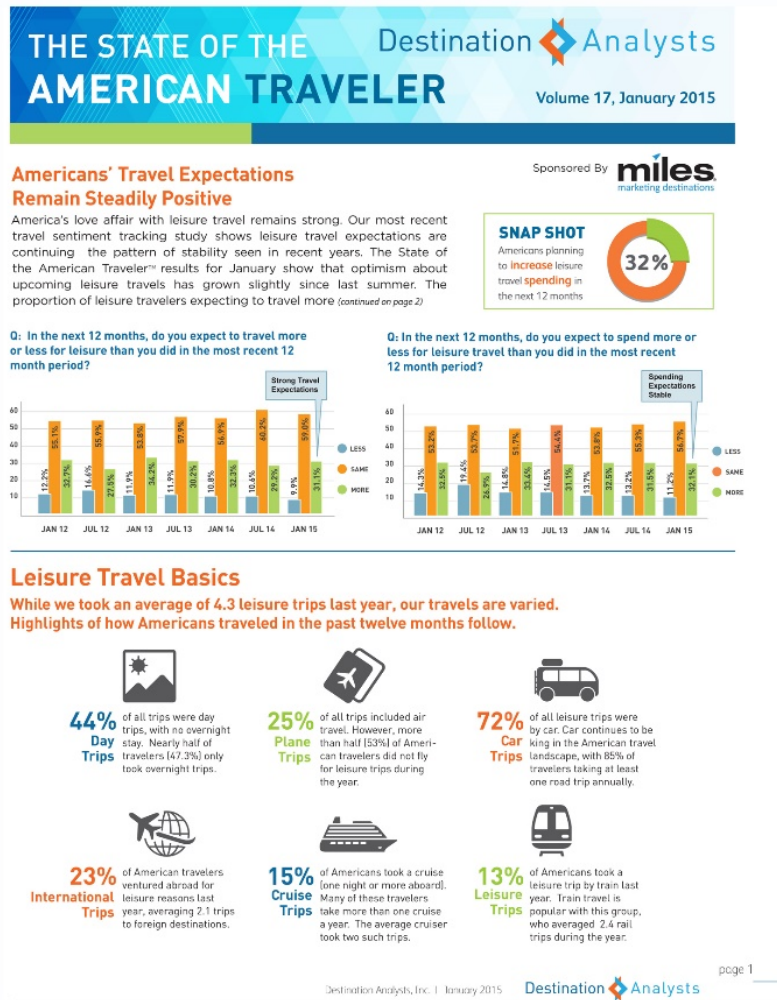


The **State** of the
American Traveler
Florida Spotlight

The **State** of the
American Traveler
Florida Spotlight

RESEARCH OVERVIEW

RESEARCH OVERVIEW



- Online survey conducted bi-annually since 2006 (quarterly beginning in 2016)
- Survey invitation sent to a nationally representative sample of US adults
- Total sample of 2,000+ American leisure travelers
- Examines traveler sentiment, motivations & behaviors
- Data presented is from July 2015 and January 2016 surveys

The **State** of the
American Traveler
Florida Spotlight

DEFINITION: THE FLORIDA TRAVELER

“Florida Travelers”: American leisure travelers who have taken a leisure trip in Florida in the past two years and/or are likely to take a leisure trip in the state in the next two years

The **State** of the
American Traveler
Florida Spotlight

TRAVEL SENTIMENT

Q: How are Florida Travelers feeling about travel right now?



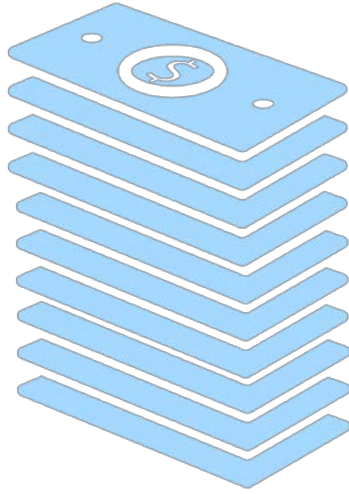
A: Optimism continues!

The typical **Florida Traveler** took **5** leisure trips in the last year
This is **35%** more trips than other American leisure travelers

**40% of Florida Travelers
expect to travel more in 2016 compared to 2015**

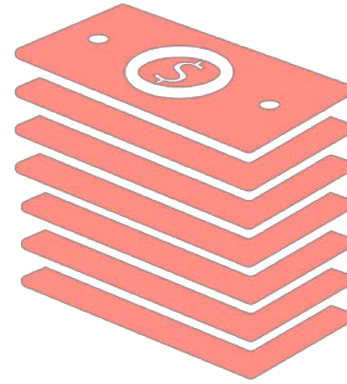
**39% of Florida Travelers expect to
spend more on travel in 2016 than in 2015**

Anticipated Spending for Leisure
Next 12 Months



\$4,012

Florida Oriented



\$2,553

Not Florida Oriented

International Travel Sentiment—By Market

Intent to Travel: International

(% expect to travel more in next 12 months)

	2014	2015	2016
Brazil	66.9%	66.4%	72.5%
Mexico	60.3%	61.0%	66.4%
China	77.1%	68.4%	65.1%
Argentina	--	--	61.0%
India	52.4%	58.7%	52.8%
Italy	32.9%	39.6%	46.6%
South Korea	45.3%	48.4%	46.4%
United Kingdom	24.2%	32.2%	33.7%
France	28.8%	32.7%	32.8%
Australia	32.3%	33.4%	31.5%
Canada	26.7%	33.5%	31.2%
Germany	25.7%	29.6%	31.1%
Holland	--	--	27.5%
Japan	23.8%	24.4%	24.3%
Russia	--	33.7%	--



The **State** of the
American Traveler
Florida Spotlight

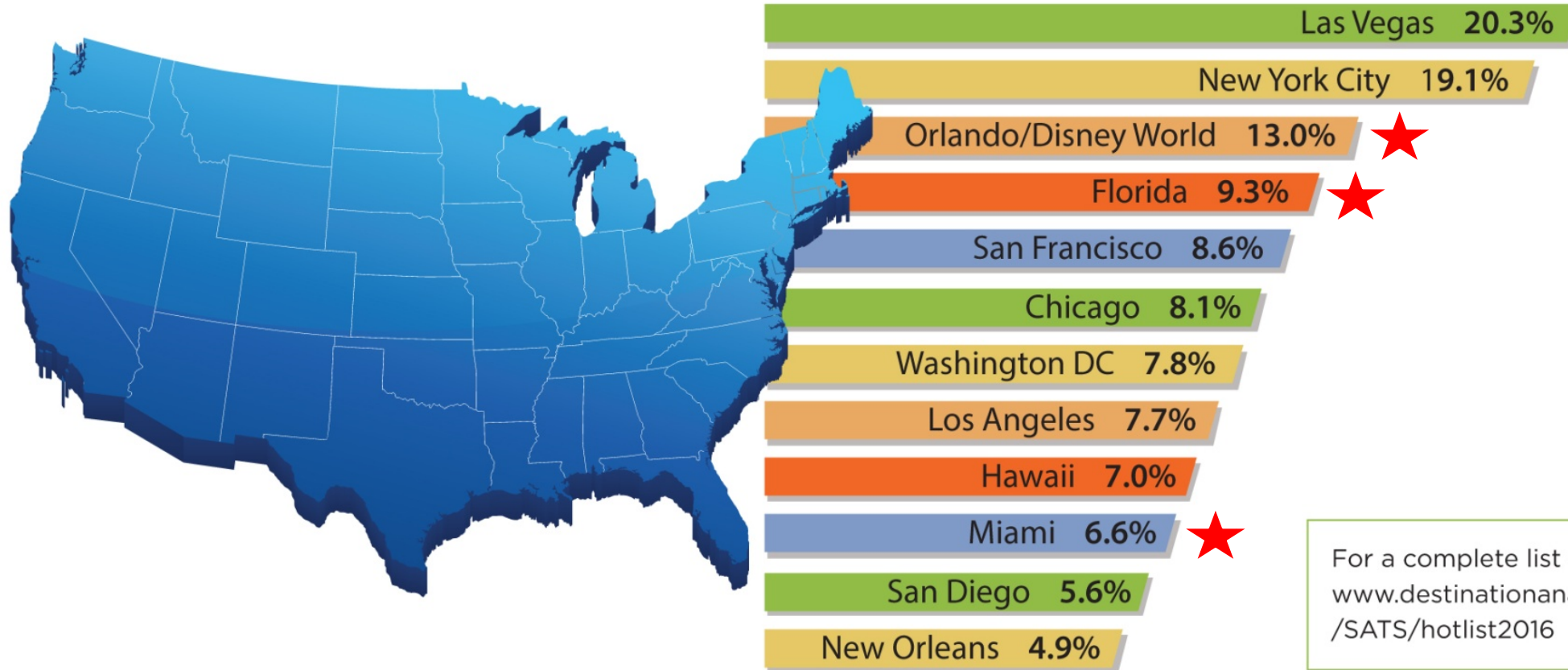
THE STRENGTH OF THE FLORIDA BRAND

42%

of US leisure travelers are likely to visit Florida
in the next
3 years

Most Desired U.S. Destinations — 2016

What are the five domestic destinations that you would most like to visit in the upcoming year? (OPEN ENDED)



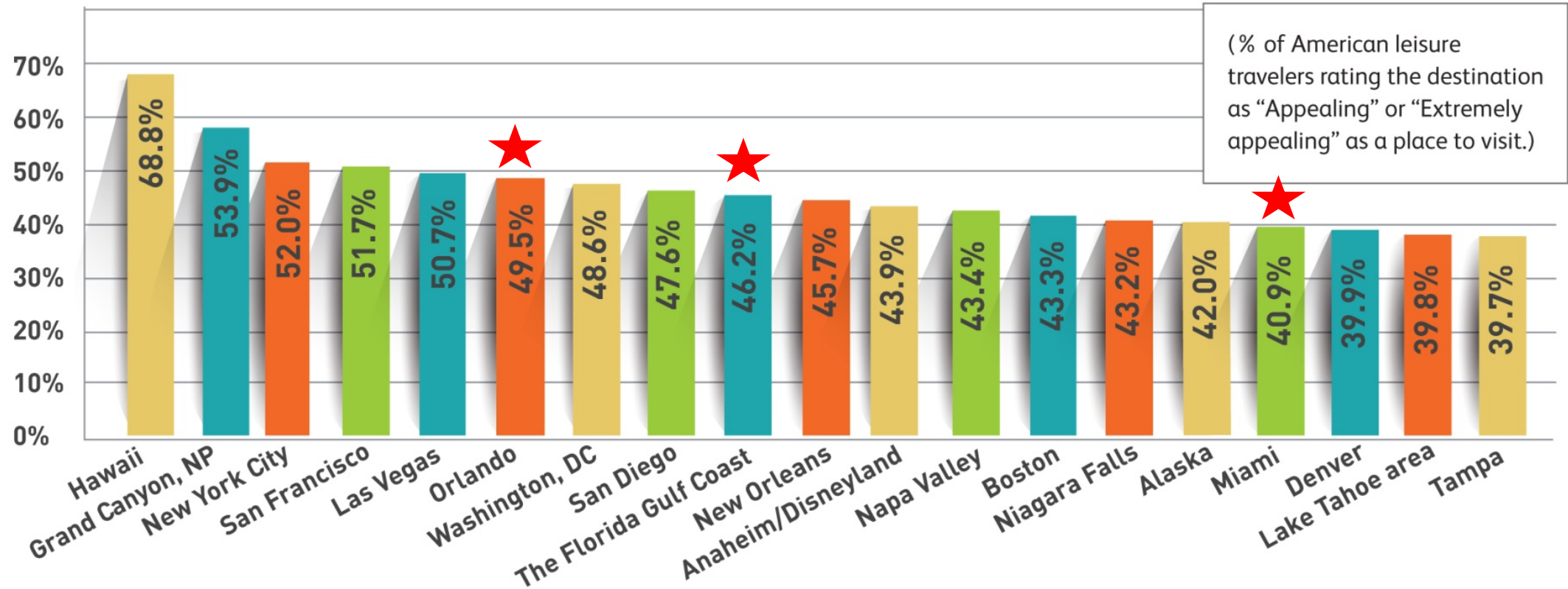
For a complete list visit
www.destinationanalysts.com/SATS/hotlist2016

Likely Visitation to Florida Destinations

Orlando, Florida	27.0%
The Florida Gulf Coast	17.4%
Miami, Florida	16.3%
Tampa, Florida	14.5%
St. Petersburg/Clearwater, Florida	10.5%
Jacksonville, Florida	9.3%
St. Augustine, Florida	9.1%
Sarasota, Florida	8.5%

Q. Which of these destinations are you likely to travel to in the next three years?

Most Appealing U.S. Destinations



44%

of likely international travelers most want to visit
Florida on their next trip to the United States

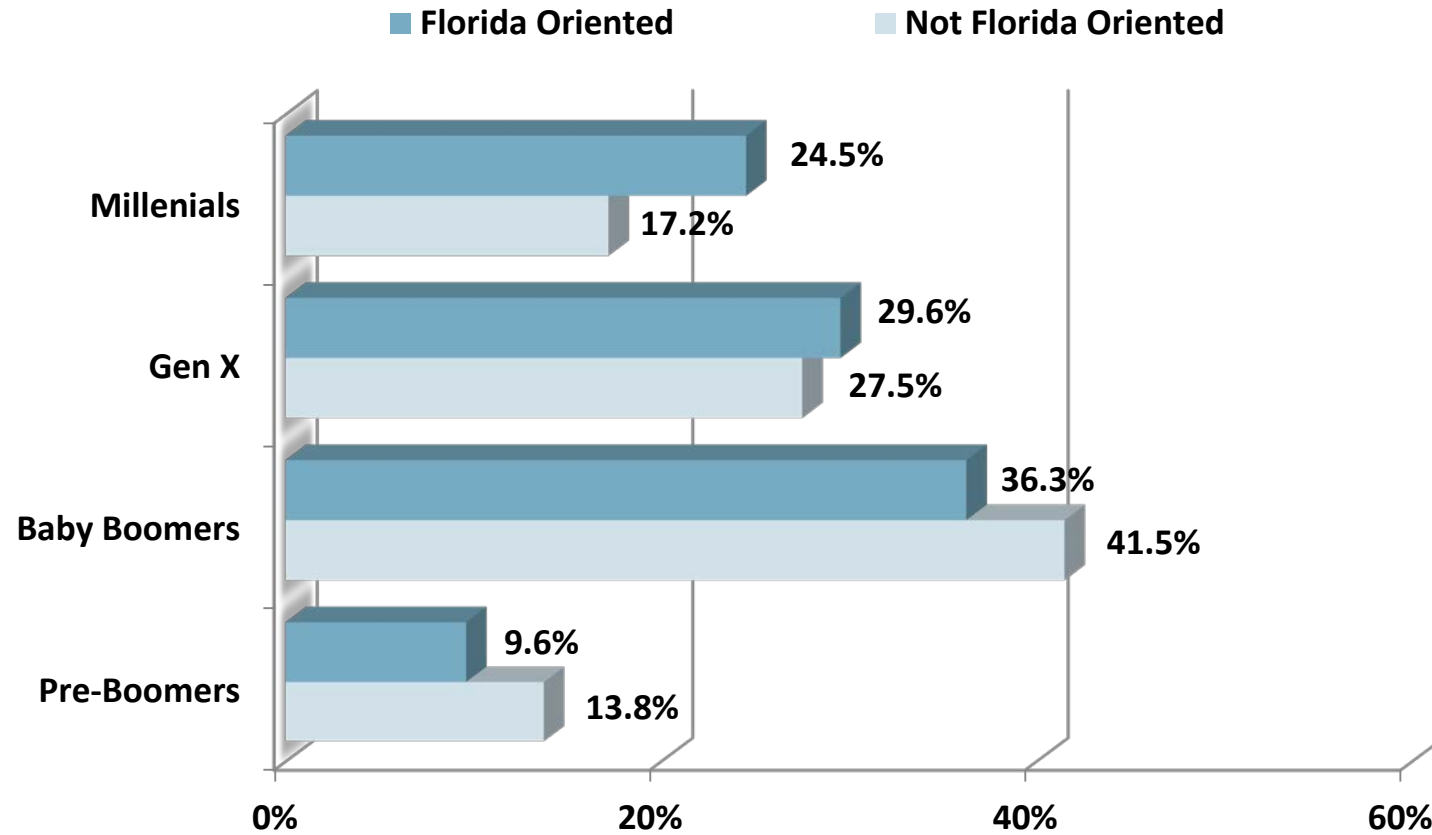
87%

of likely international travelers rate Florida destinations as appealing

The **State** of the
American Traveler
Florida Spotlight

**THE FLORIDA TRAVELER:
UP CLOSE**

Generation



Question: In what year were you born? Base: All Respondents. 2,063 completed surveys.

Most Popular with People Like You

MILLENNIALS

New York

BOOMERS

Las Vegas

Florida ★



Demographically Different



More Likely to be
Married with
Children under 18

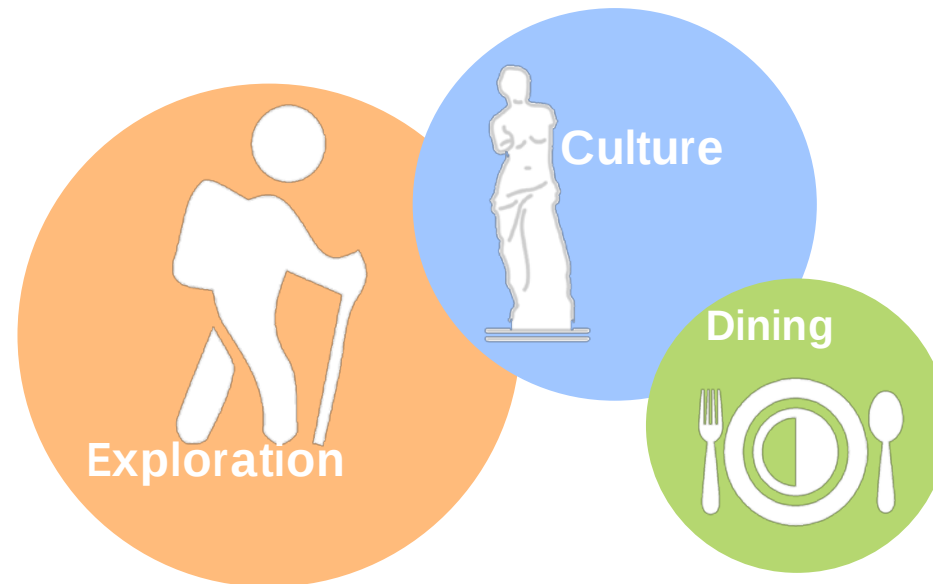
More Likely to be
from a Suburban
area



Above Average
Annual Household
Income: \$78,585

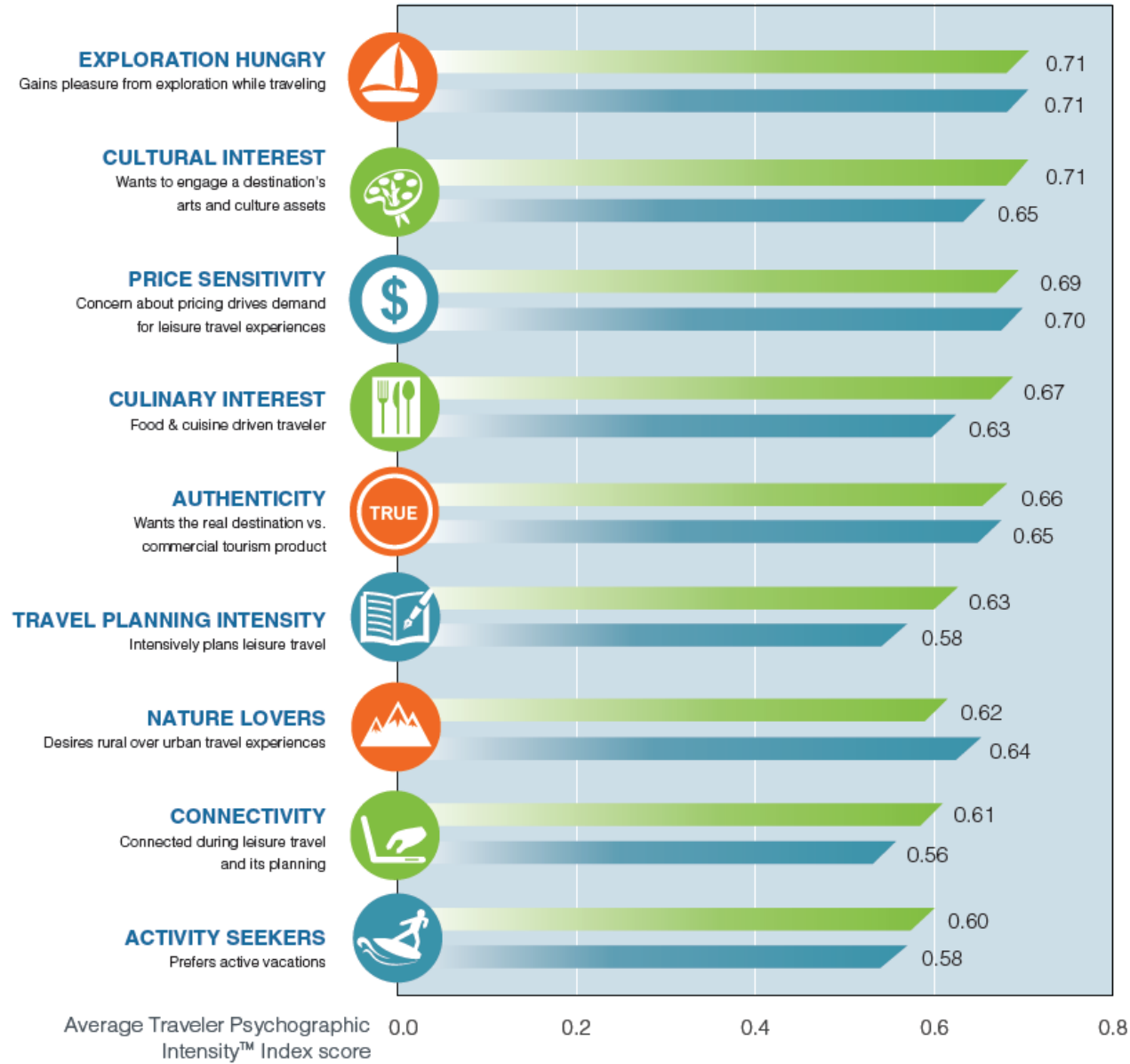
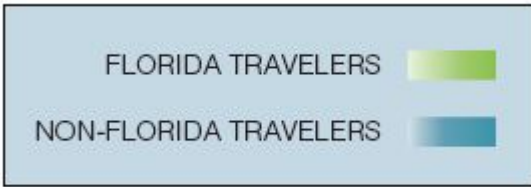
Psychographically Different

Traveler Psychographics
Florida Oriented Travelers



TRAVELER PSYCHOGRAPHIC INDICES

- **EXPLORATION** - Gains pleasure from a sense of exploration while traveling
- **PRICE SENSITIVITY** - Willing to spend money freely for leisure travel experiences
- **CULTURAL INTEREST** - Wants to engage with a destination's cultural assets
- **AUTHENTICITY** - Interested in what they perceive to be the real destination, not commercial tourism product
- **PLANNER** - Intensively plans elements of their leisure travel
- **CONNECTIVITY** - Connected during leisure travel and its planning
- **ACTIVITY** - Enjoys active vacations
- **CULINARY INTEREST** - Food & cuisine driven traveler
- **URBAN TRAVELERS** - Seeks urban travel experiences over rural



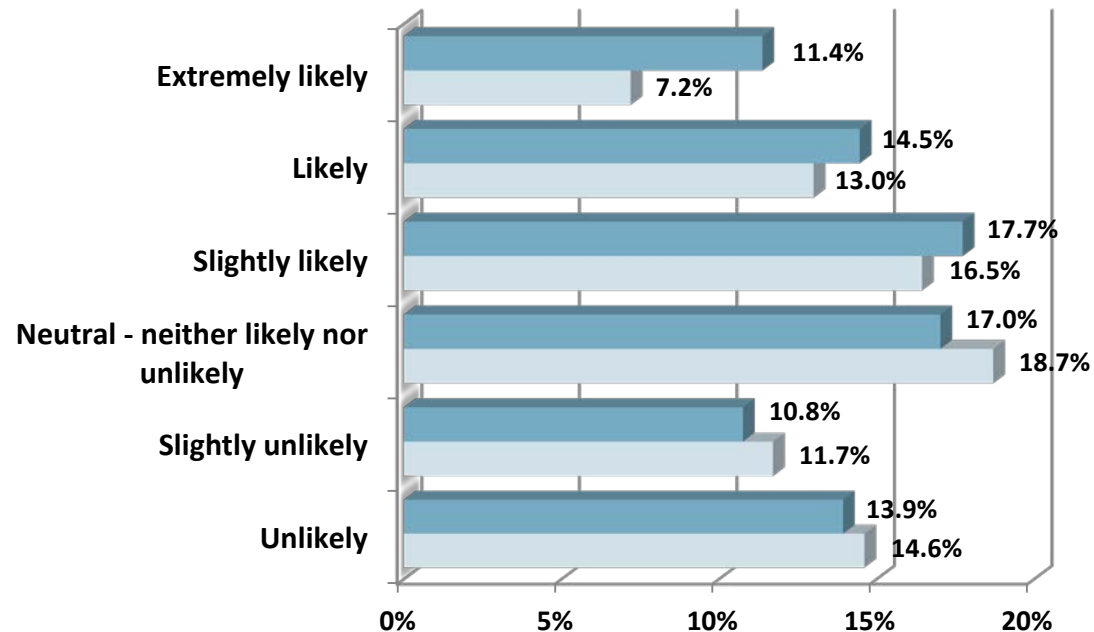
Connectivity



Likelihood to be Uncomfortable if Disconnected

43.6% of Florida Travelers are Likely to Feel Uncomfortable without Access to Emails/Texts while Traveling

■ Florida Oriented ■ Not Florida Oriented

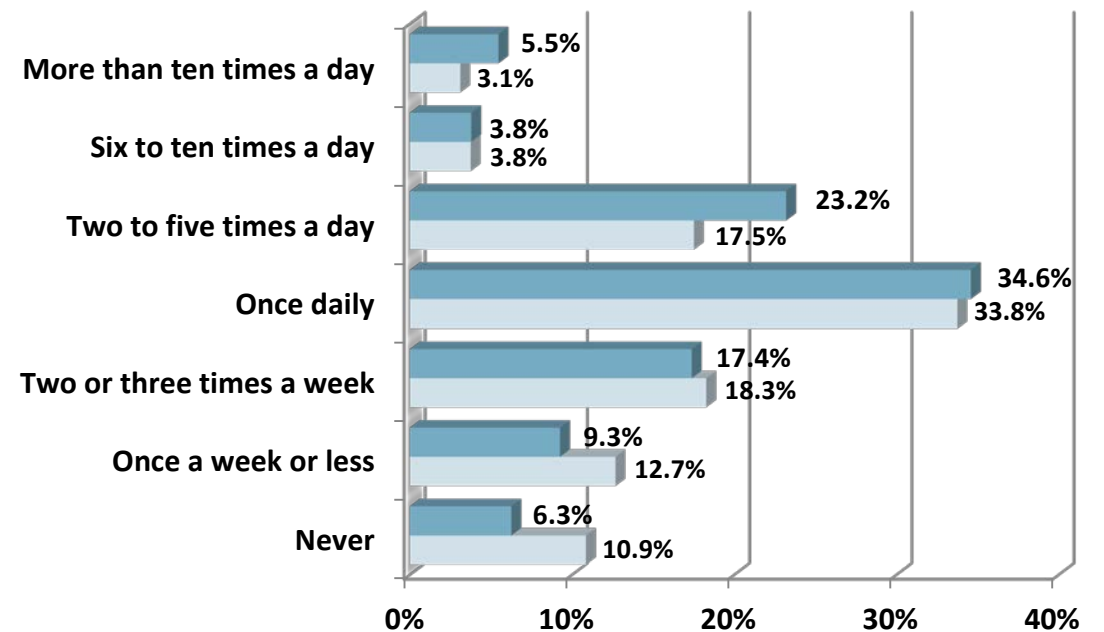


Question: How likely are you to feel very uncomfortable if you are without access to emails or text messaging? Base: All Respondents. 2,044 completed surveys.

Frequency of Checking-in While Traveling

66.6% of Florida Travelers are Likely to Respond to Emails/Texts at least Once a Day while Traveling

■ Florida Oriented ■ Not Florida Oriented

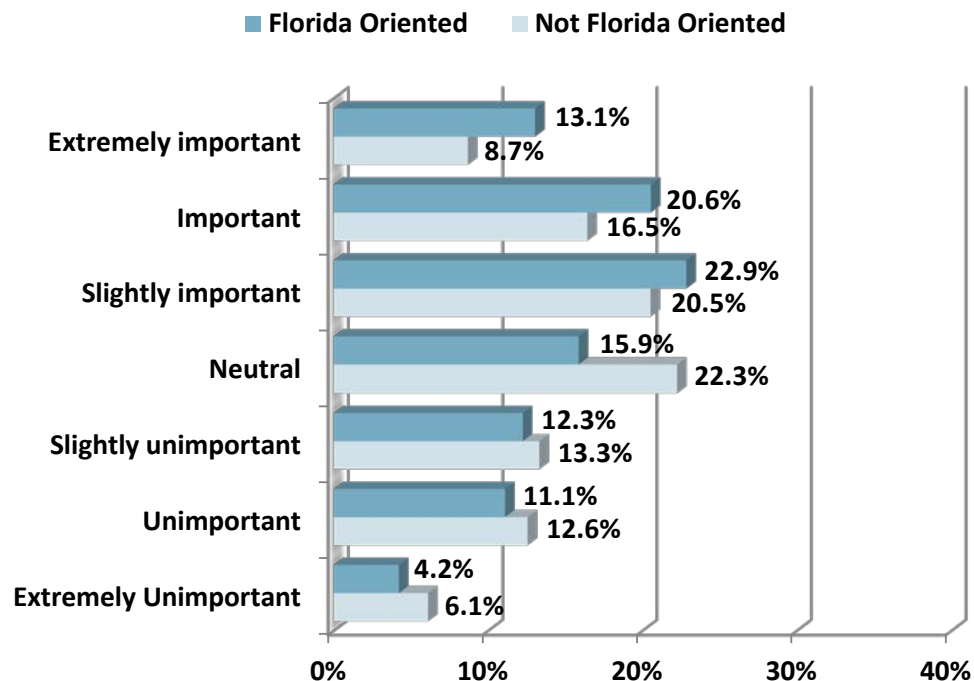


Question: Imagine you are taking a domestic leisure trip (of at least one week in length). How often are you likely to check email, respond to text messages or access the Internet? Base: All Respondents. 2,044 completed surveys.



Importance of Having a Full Schedule of Things to See and Do While Traveling

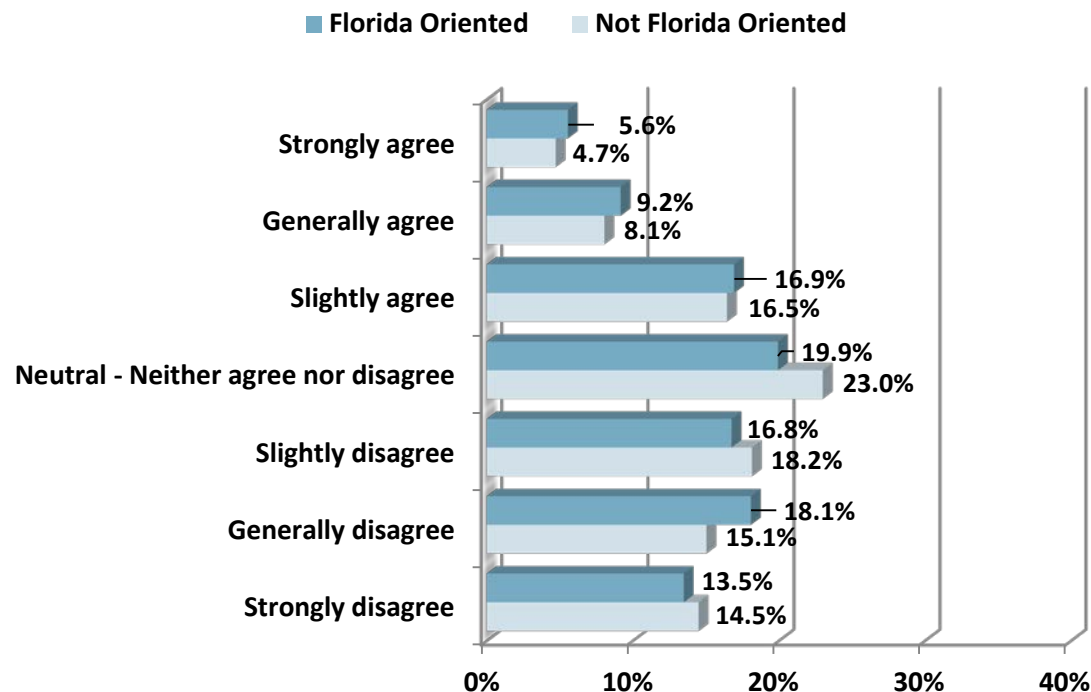
56.6% of Florida Travelers Say it's Important that they have a Full Schedule of Things to See & Do Everyday of their Trip



Question: Please evaluate how generally important each is to your domestic leisure travel. Having a full schedule of things to see and do everyday. Base: All Respondents. 2,063 completed surveys.

Vacations Usually End up Being Hectic and Busy

31.7% of Florida Travelers Agree that their Vacations End Up being Hectic and Busy



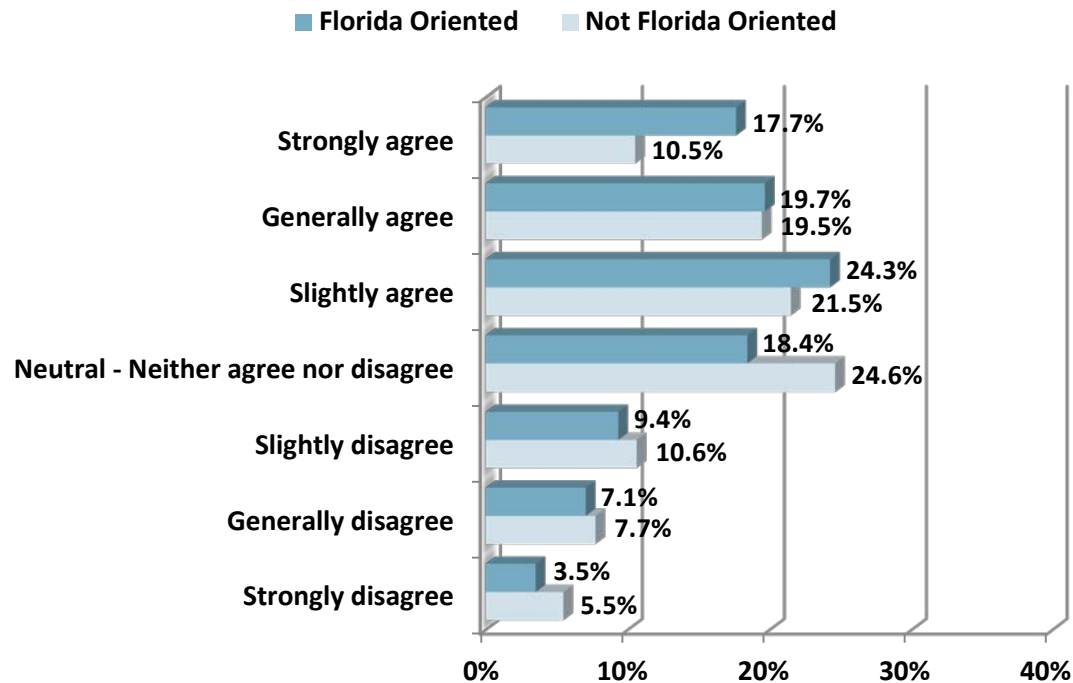
Question: Thinking about your domestic leisure travels, how much do you agree with each statement? My vacations usually end up feeling hectic or busy. Base: All Respondents. 2,063 completed surveys.

Culinary Interest



Importance of Unique and Special Culinary Experiences

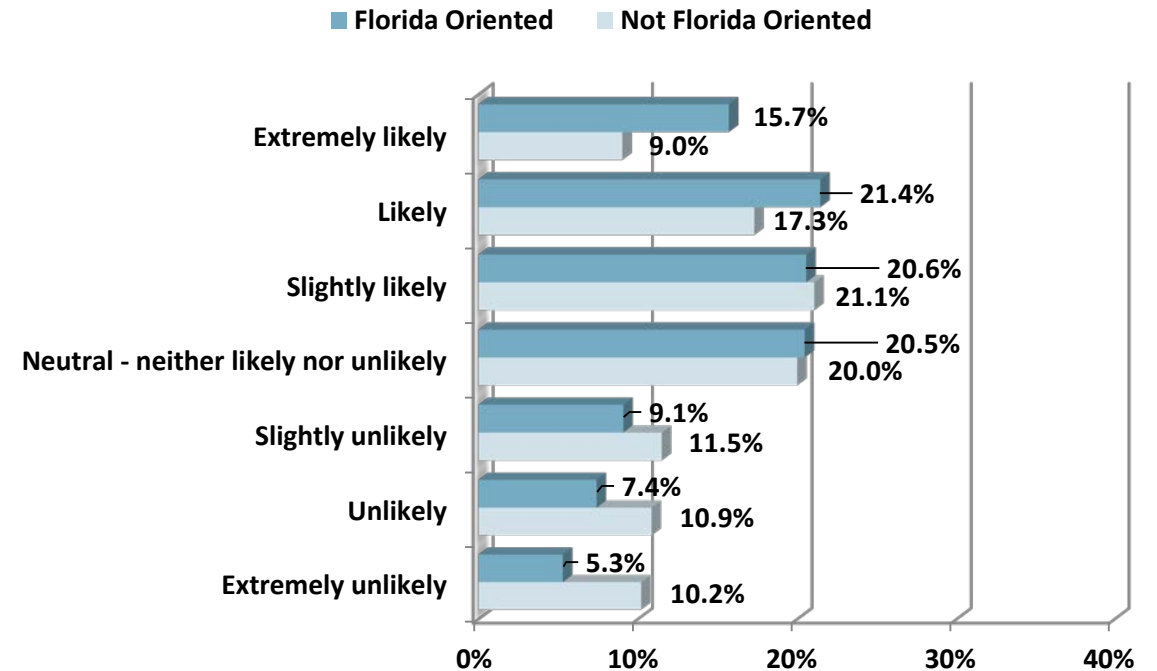
61.7% of Florida Travelers Agree that Unique/Special/Interesting Culinary Experiences are Important to them while Traveling



Question: Thinking about your domestic leisure travels, how much do you agree with each statement? When traveling, unique, special or interesting culinary experiences are very important to me. Base: All Respondents. 2,063 completed surveys.

Extensively Research Restaurants Prior to Departure

57.7% of Florida Travelers are Likely to Extensively Research Restaurants Prior to their Trip

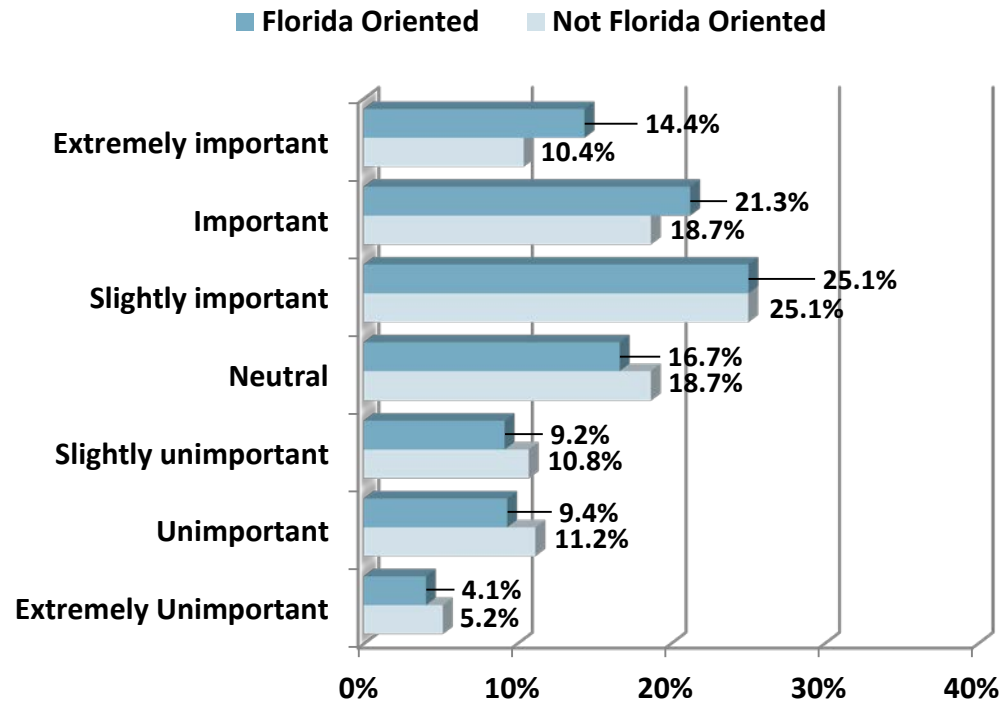


Question: Thinking about how you generally travel, how likely are you to do each of these while on domestic leisure trips? Extensively research the restaurants prior to traveling. Base: All Respondents. 2,063 completed surveys.



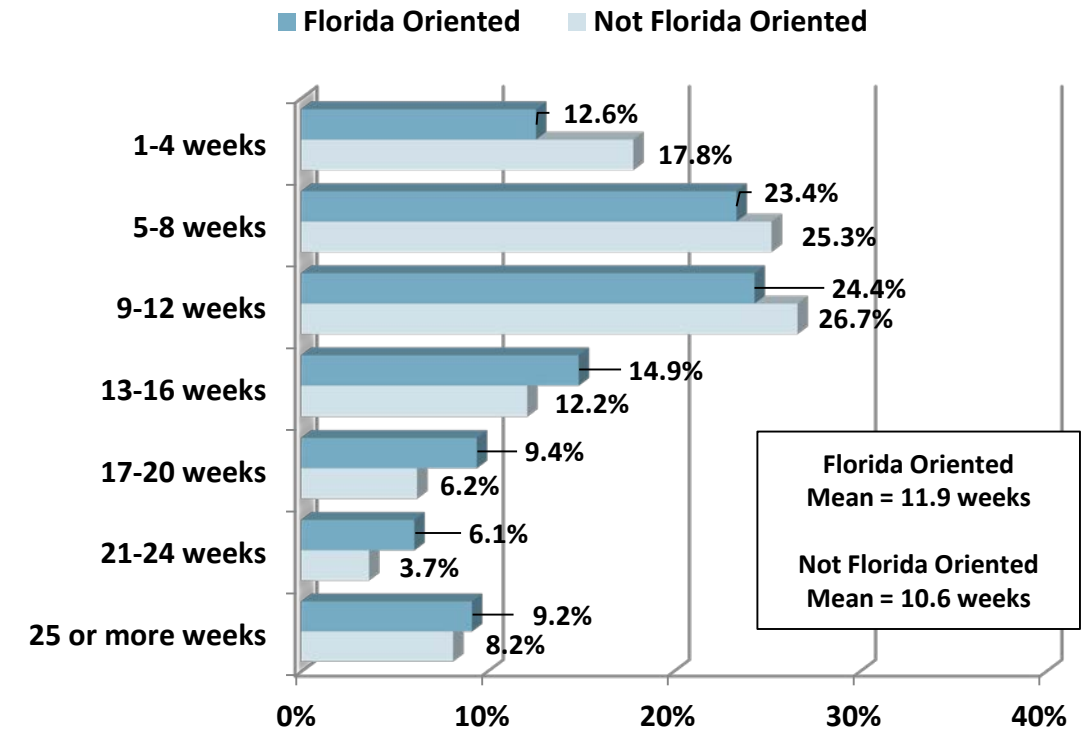
Leadership in Travel Planner

60.8% of Florida Travelers Feel it is Important that they take a Leadership Role in Planning Leisure Travel with Friends/Family



Question: Please evaluate how generally important each is to your domestic leisure travel. Taking a leadership role in planning leisure travel with my friends and family. Base: All Respondents. 2,063 completed surveys.

Weeks in Advance for Start of Travel Planning



Question: How many weeks IN ADVANCE would you typically begin planning a domestic leisure trip (of at least one week in length)? Base: All Respondents. 2,063 completed surveys.

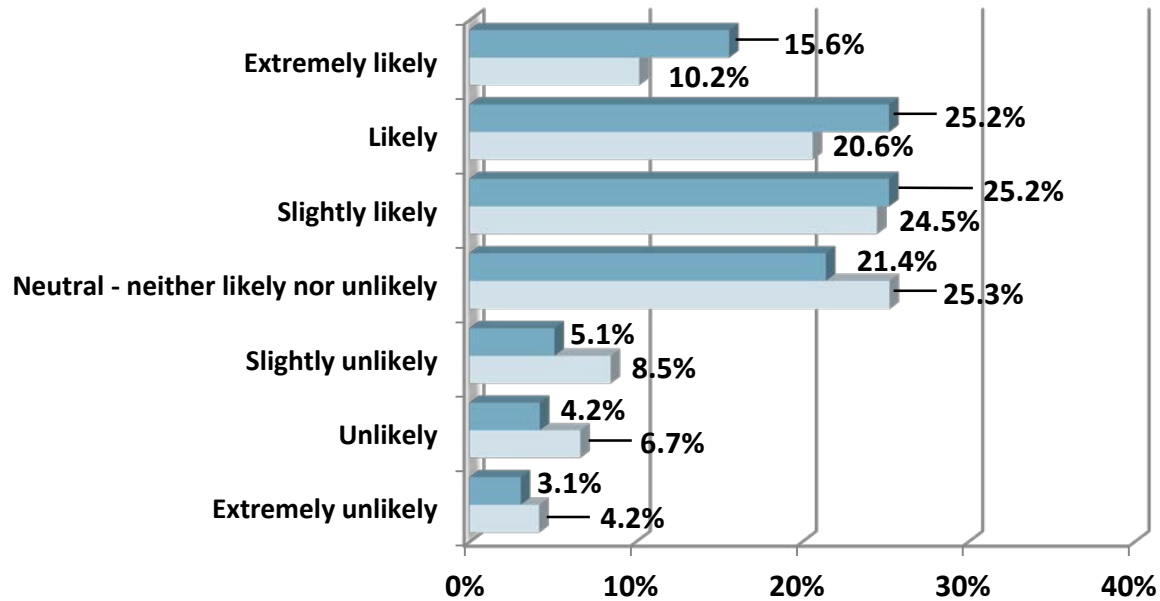
Culture



Likelihood to Prioritize Learning about Destination Culture

66.0% of Florida Travelers are Likely to Prioritize Learning as much as possible about the Customs, Traditions and History of their Travel Destination

■ Florida Oriented ■ Not Florida Oriented

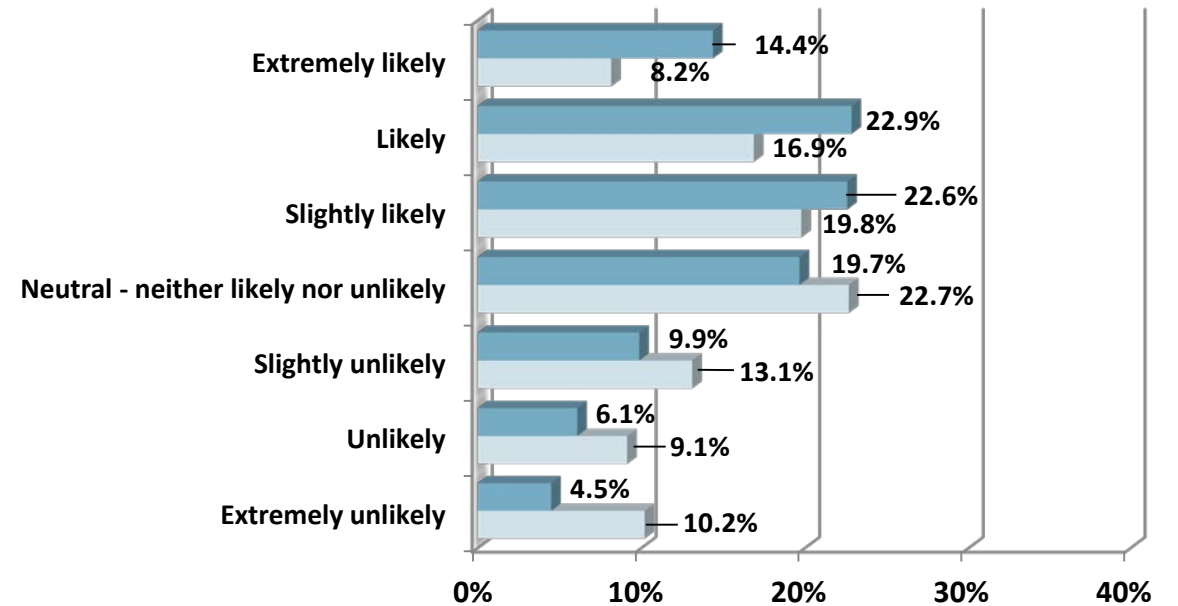


Question: Thinking about how you generally travel, how likely are you to do each of these while on domestic leisure trips? Prioritize learning as much as possible about the customs, traditions and history of my destination. Base: All Respondents. 2,063 completed surveys.

Likelihood of Attending Theater or Performing Arts

59.9% of Florida Travelers are Likely to Attend Theater, Performing Arts or Live Music Shows on their Leisure Trips

■ Florida Oriented ■ Not Florida Oriented

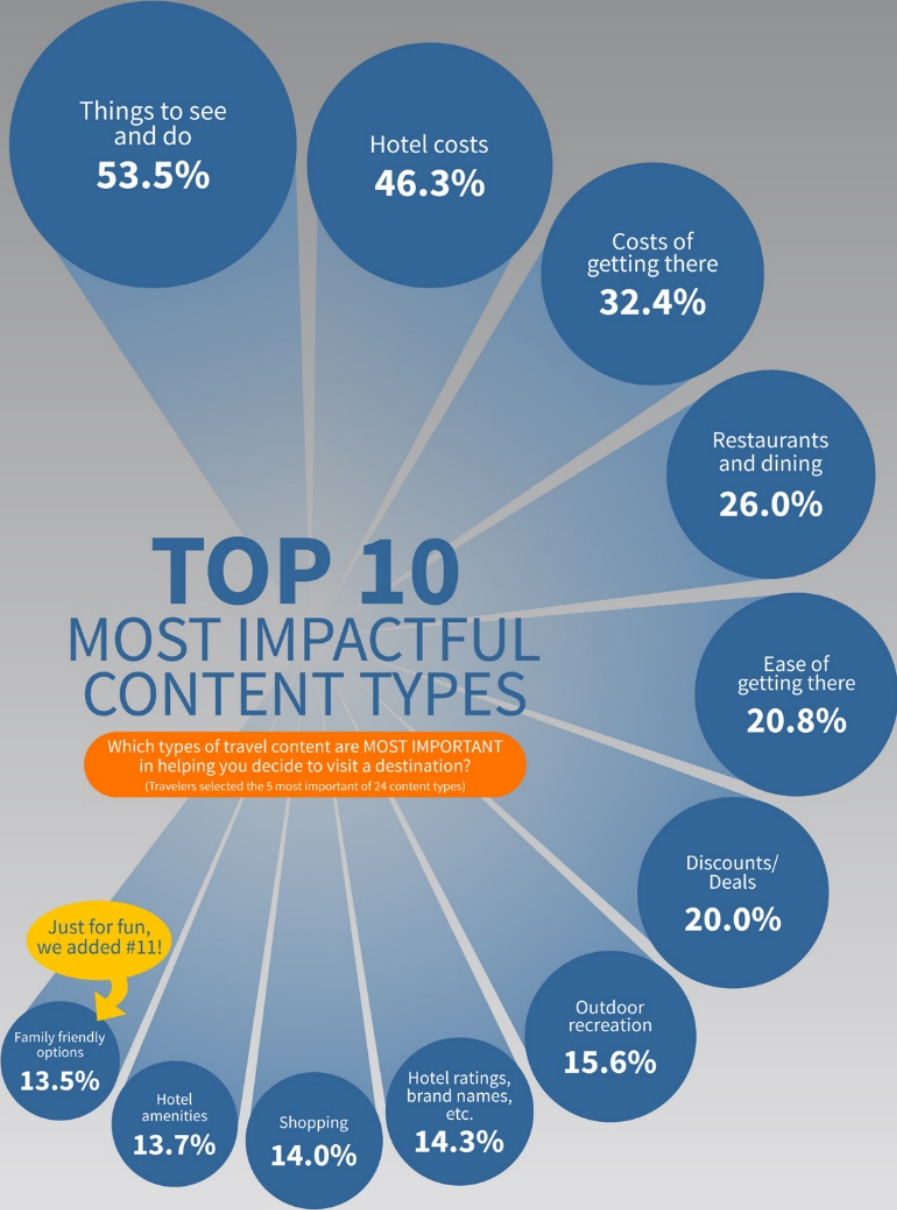


Question: Thinking about how you generally travel, how likely are you to do each of these while on domestic leisure trips? Attend theater, performing arts or live music shows. Base: All Respondents. 2,063 completed surveys.

Content that Drives Destination Decision

DESTINATION SELECTION

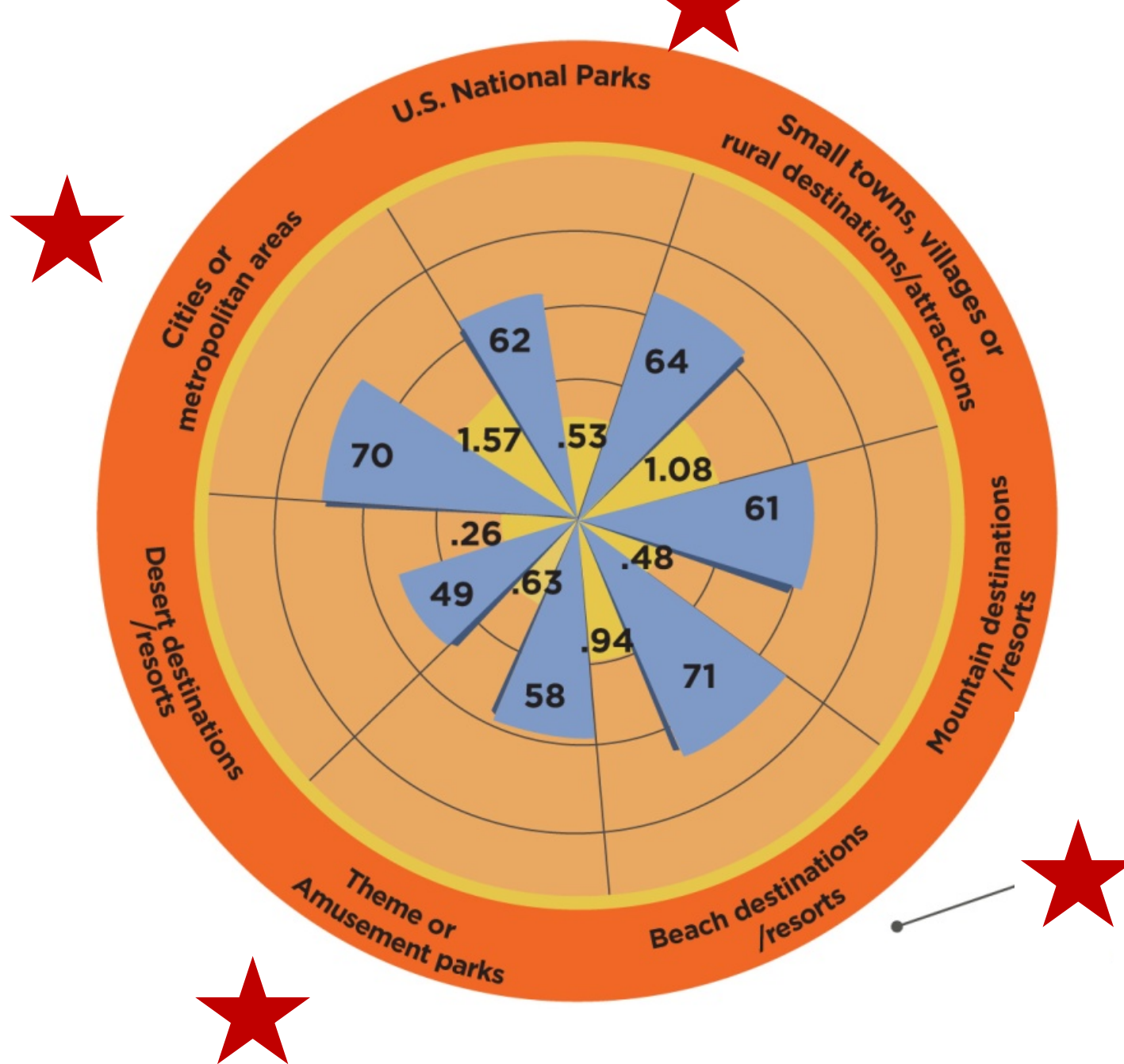
THE IMPORTANCE OF CONTENT



Content Preferences: Florida Travelers vs Other Travelers

While they are largely the same as other American leisure travelers, Florida Travelers place greater importance on content related to museums & culture, sightseeing tours, important iconic attractions and ideas for adventurous travel in their destination decision process.

Destination Excitement Index



What Content is Important in Evaluating Destinations?



Most Important Content – Cities & Urban Areas



Florida Travelers

Events & Shows: 29.9%

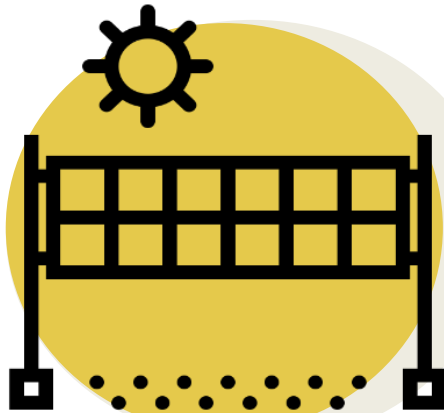
Historical Attractions: 23.4%

Museums & Culture: 22.1%





Most Important Content – Beaches



Florida Travelers

Events & Shows: 14.5%

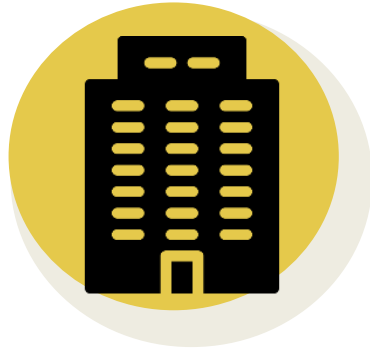
Historical Attractions: 10.0%

Museums & Culture: 5.5%





Most Important Content – National/State Parks & Recreation Areas



Florida Travelers

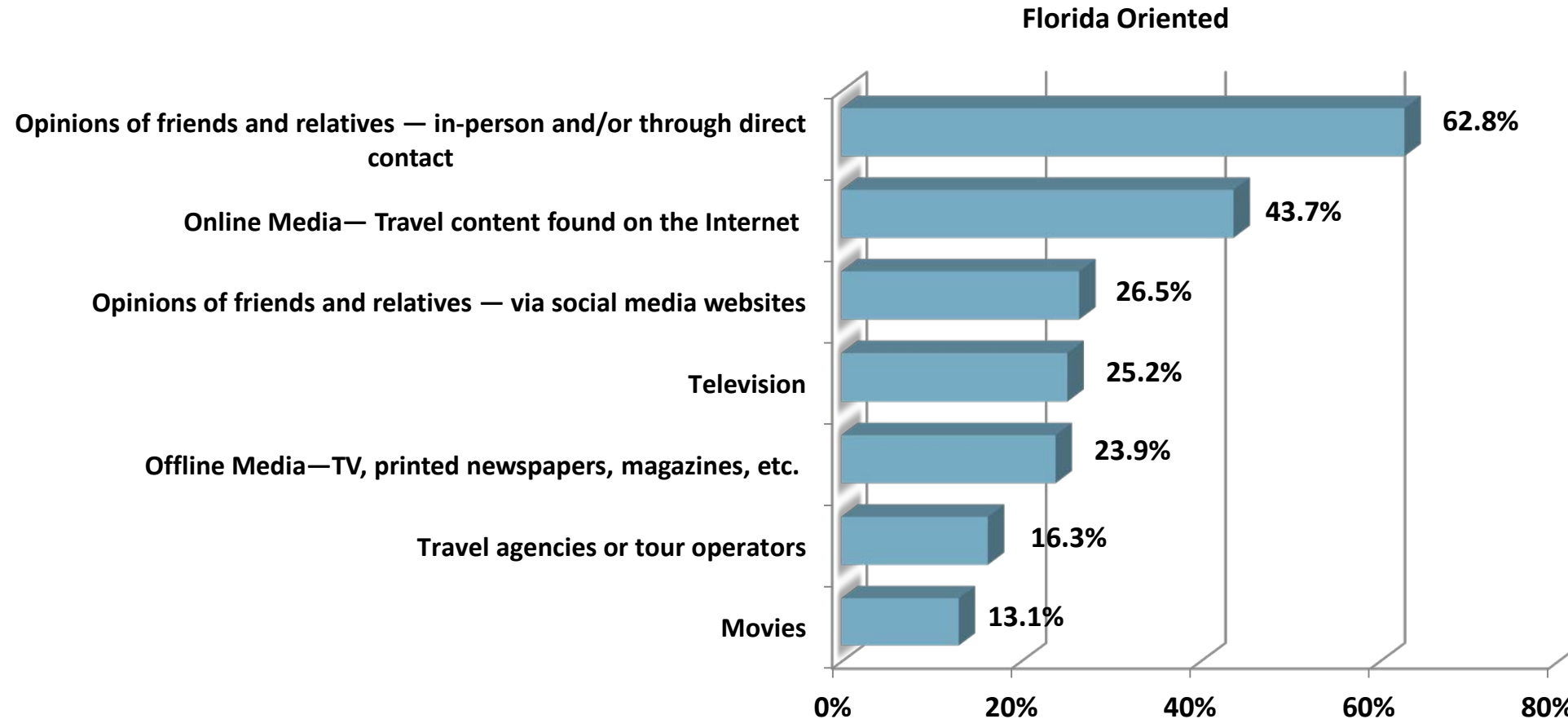
Events & Shows: 34.5%

Historical Attractions: 55.3%

Museums & Culture: 34.5%

Travel Planning Media Habits: Florida Travelers vs Other Travelers

Sources of Inspiration for Trips



Question: Please think specifically about how you get your inspiration for the destinations you want to visit. Which would you typically use to find destination ideas and inspiration? (Select all that apply) Base: All Respondents. 2,063 completed surveys.



56%

**Use Social Media in
Trip Planning**

*vs. an Average of 38% for
"non-Florida Travelers"*

*Most travelers use social media
to see or share trip photos;
encourage your guests to
share their experience through
services like free Wi-Fi*



52%

**Seek Out Reviews, Ratings and User-Generated Content
for Ideas and to Validate Their Selection**

vs. an Average of 31% for All Other US Travelers



57%

**Use Print Publications:
Visitor Guides,
Brochures, Magazines**

*vs. an Average of 41% for
"non-Florida Travelers"*



15%

Use Official Visitor Guides:
City, Regional or State
Vacation Publications

*From a CVB or other DMO
vs. an Average of 12% for
"non-Florida Travelers"*

Florida Travelers are
three times more
likely to use the
digital version of a
DMO visitor guide

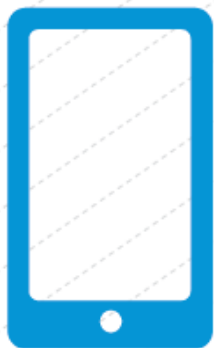
39%

Use Official Destination
Websites

*From a CVB or other DMO
vs. an Average of 26% for
"non-Florida Travelers"*



Florida Travelers are
about 20% more
likely to use a DMO
website BEFORE their
destination decision is
final.



43%

**Use Tablets To Access
Travel Information**

*vs. an Average of 23% for
"non-Florida Travelers"*



58%

**Use Smartphones To
Access Travel Information**

*vs. an Average of 39% for
"non-Florida Travelers"*