2019-20
MARKETING PLAN

VISITFLORIDA®
# 2019-20 Visit Florida Marketing Plan

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ABOUT VISIT FLORIDA

VISIT FLORIDA, the state’s official tourism marketing corporation, serves as Florida’s source for travel planning to visitors across the globe. VISIT FLORIDA is a not-for-profit corporation created as a public/private partnership by the Florida Legislature in 1996.

As the Sunshine State’s No. 1 industry, tourism was responsible for welcoming a record 124.7 million visitors in 2018. Based on the latest economic impact study, out-of-state visitors to Florida contributed $86 billion to Florida’s GDP and supported 1.5 million Florida jobs. According to the Florida Office of Economic and Demographic Research, for every $1 the state invests in VISIT FLORIDA, $2.15 in state tax revenue is generated.

Each year, the Florida Legislature appropriates public funding to be allocated for tourism marketing. VISIT FLORIDA is required to match this public investment dollar for dollar by partnering with the state’s tourism industry through cooperative advertising campaigns, promotional programs, and other innovative marketing ventures. Through this partnership, VISIT FLORIDA serves more than 13,000 tourism businesses from all 67 counties across the state.

VISIT FLORIDA facilitates tourism industry participation in domestic and international travel trade and consumer shows, as well as media missions to the top global visitor markets. VISIT FLORIDA also works closely with travel agents, tour operators and meeting and event planners, and is responsible for operating Florida’s Official Welcome Centers.

2020 STRATEGIC PLAN

To keep Florida ahead of the competition, VISIT FLORIDA and its Board of Directors implemented a strategic plan in 2015 intended to carry the Florida tourism industry through 2020.

PURPOSE Brighten the lives of all.

VISION Establish Florida as the No. 1 travel destination in the world.

MISSION Strengthen Florida’s share of the global travel market.

GOAL Maximize the economic impact of travel and tourism to Florida.

OBJECTIVE $100 billion in tourism-related spend by 2020.

VALUES Make an impact. Work purposefully and live passionately. Innovate.

Learn more about VISIT FLORIDA: VISITFLORIDA.org
NO. 1 TRAVEL DESTINATION IN THE WORLD

VISIT FLORIDA’s vision – to establish Florida as the No. 1 travel destination in the world – is ambitious but achievable. To succeed, VISIT FLORIDA must build a strategic marketing platform that aligns the collective interests of the Florida tourism industry and provides integrated marketing opportunities for the industry to leverage.

MARKETING PRINCIPLES

CREATE VALUE & ADD VALUE
Every VISIT FLORIDA program or initiative must create and add value for travelers and for industry Partners. If the industry can produce a program at the same cost and with the same impact, there is no reason for VISIT FLORIDA to invest resources in the program. VISIT FLORIDA programs must provide the Florida tourism industry a strategic advantage and must inspire consumers with valuable information or a valuable service.

QUALITY VS. QUANTITY
Scale matters, but impact matters more. The impact of a promotion on consumer behavior is more important than the number of people that the promotion reaches. VISIT FLORIDA is committed to delivering high-quality innovative programs that give Florida a competitive advantage. These programs will be thoroughly vetted, measured and optimized to ensure they maximize the impact of every dollar spent.

DIGITAL FIRST
Constant technological advancement has left the world of marketing in a state of permanent transformation. In order to ensure that VISIT FLORIDA thrives in the future, it must be a marketing company that thinks digital first. We will invest in platforms, partners and people who understand how technology will evolve and can provide data that both consumers and businesses are cutting back on.

TRAVELER-CENTRIC
The goal of all VISIT FLORIDA efforts is to deliver visitors to the state. Our ability to be successful requires a comprehensive understanding of Florida’s visitors and potential travelers. Prioritizing the traveler helps VISIT FLORIDA deliver greater results for our Partners and ultimately the residents of Florida.

DATA-DRIVEN
In order for VISIT FLORIDA to compete in a hyper-competitive landscape, every decision must be data-driven. Priority will be placed on programs that can be measured and optimized and can provide data that continuously improves our ability to attract potential visitors.

IF IT’S WORTH DOING, IT’S WORTH DOING RIGHT
While wise financial stewardship is critical in all that we do, VISIT FLORIDA will not sacrifice quality to save money; nor will we initiate a new program or continue with an existing program without dedicating the resources necessary to make the program a success. VISIT FLORIDA will protect our brand promise and will commit to do it right or not do it at all.

TRENDS WE ARE WATCHING

PRIVACY REMAINS PARAMOUNT
For most marketers, all business decisions are grounded in data. It is the key to building stronger brands, smarter audience targeting, and improved customer service.

Customers are often the beneficiaries. Reliable data lead to more relevant content, meaningful interactions, and useful product offers.

But following the countless data breaches over the past few years, consumers are skeptical and growing more vigilant about their privacy. Research from software company Janrain found that 69% of American consumers would like to see privacy laws like the European Union’s General Data Protection Regulation (GDPR) enacted.

California’s Consumer Privacy Act will launch on Jan. 1, 2020, and it is just the beginning. Businesses will be forced to become more transparent about the way they collect, store, and use customer data.

With more readily accessible data, consumers have come to expect personalized messaging and experiences. For brands, this means developing a one-to-one marketing approach. And that presents a challenge for smaller companies, like VISIT FLORIDA, who lack the in-house resources to meet these demands. Successful personalized marketing will require partnership with larger brands with established reputations for protecting consumer data.

CIVIC RESPONSIBILITY
Responsible consumerism has gone mainstream. “With the growing ease of buying goods and experiences,” Forbes reports, “consumers are seeking out brands that help them make better, more responsible choices.” Eliminating plastic at home and engaging in a zero-impact lifestyle are daunting changes, but supporting green brands is a feel-good first step for many. A growing number of consumers are passionate about social equality and environmental sustainability – and brands are paying attention. Patagonia and Nike are proactively taking stands on issues in ways that align with their own values and they’re being rewarded with sales and brand loyalty. Destinations should follow suit and get up to date on what matters most to their core audiences. With 825 miles of beaches, 1,200 freshwater springs, and over 1,300 trails, protecting Florida’s natural resources is essential to Florida’s thriving tourism industry.

ECOLOGIC SLOWDOWN
Visitiation to Florida has benefited from the American economic expansion that began in 2008. Most economists project that growth to continue through at least 2020, but at a slower rate. The Federal Reserve also is signaling a deceleration in the economy – tax revenue, jobs, and the buffer against a state income tax – VISIT FLORIDA closely monitors and stands ready to respond to changing economic conditions. Any deceleration in the economy could create significant financial impact in an industry that contributes more than $80 billion to Florida’s economy. Marketing to the right travelers at the right time with the best message will be more important than ever.

EXPERIENCE IS THE CORE OF EVERYTHING
“Customer centricity is a nice-to-have, it is a must-have,” says the research firm Phocuswright. “The travel industry needs to meet consumers along the entire spectrum of their journeys. The sum of these interactions will make up their experience, whether good or bad.”

Companies are investing in customer experience teams – which is wise because, as global marketing research firm Euromonitor reports, consumers expect more. They want products and services delivered within frictionless experiences that mesh with their lifestyles.

How far off is the “super app” that takes all aspects of a consumer’s life and combines those functions into a single platform? China already has WeChat: pay your bills, buy groceries, follow the news, check social media, have a video conversation, transfer money between accounts, create a podcast and enhanced experience for travelers – before, during and after their vacations.

How might trade negotiations with the United States and China’s declining overall growth impact their burgeoning travel class?

- Argentina and Venezuela. How will their economic struggles affect travel?
- China. How might trade negotiations with the United States and China’s declining overall growth impact their burgeoning travel class?
- United Kingdom. What will become of Brexit and how will those decisions influence the British economy?
- The dollar. Will its value weaken with a slowing economy and will that swing in the currency exchange rate make travel to the United States more affordable?

Given tourism’s vital contributions to the Florida economy – tax revenue, jobs, and the buffer against a state income tax – VISIT FLORIDA closely monitors and stands ready to respond to changing economic conditions. Any deceleration in the economy could create significant financial impact in an industry that contributes more than $80 billion to Florida’s economy. Marketing to the right travelers at the right time with the best message will be more important than ever.

Here are some of the trends with near-term importance:

- Tourist sentiment.
- Reliance on local and social media.
- Quality of customer data.
- Experiences, products, and services.
- Economic slowdown.
- Marketing and social trends.
- Consumer protection.
- Digital marketing.
- Customer experience.
- Technology.
- Economic outlook.

For most marketers, all business decisions are grounded in data. It is the key to building stronger brands, smarter audience targeting, and improved customer service.

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EIGHT YEARS OF RECORD VOLUME

For proof of the popularity of the Florida vacation brand and confirmation that marketing matters, look at how far and fast we have come. From 2011 to 2018 – one record year after another – the number of visitors to Florida has increased by 43%, or 37.3 million additional travelers. The newest benchmark is 2018’s 124.7 million visitors. A critical part of maintaining this trend line is identifying opportunities for improvement. Here’s one: International visitor volume is down from its 2013 apex by 7%. Canadian visitation continued to rebound in 2018, and Brazil and Colombia had good years. But Germany, a traditional stronghold for Florida, was off by 9% in 2018.

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Source: VISIT FLORIDA

*estimate is preliminary and subject to change
MARKET SHARE
LARGEST SHARE OF VACATION TRAVELERS OF ALL U.S. STATES

For more than a decade now, the Sunshine State has been the uncontested leader among American vacation destinations. Florida’s share of U.S. tourists has hovered around 16% and remains at least four points better than the closest competitor. That good news is offset by cautionary data: Interest in traveling to Florida within the next two years dropped for the second consecutive year by one point (though it trails Florida in actual visitation). While it maintains its unsurpassed marketing budget, is the leading destination when it comes to travelers’ expressed interest in the Sunshine State.

To maintain our market dominance, keeping Florida top of mind among likely travelers is more important than ever. Year-round marketing campaigns reinforce Florida’s staples (beaches, weather, theme parks) and raise awareness for the state’s lesser-known experiences (cultural and culinary diversity and outdoor adventures). The alternative is also simple: When Florida doesn’t market itself, we risk dropping out of the traveler’s consideration set.

HOTEL OCCUPANCY AND REVENUE
FLORIDA SET RECORDS FOR ROOM DEMAND, ADR AND REVPAR

Top-line hotel numbers confirm that 2018 was another strong year for the Florida hotel industry. Room Demand, Average Daily Rate (ADR), and Revenue per Available Room (RevPAR) all rose to historic benchmarks.

Florida’s hotel occupancy had a net increase of 8,000 rooms, after significantly more hotels opened than closed, leading supply to outpace demand. Average monthly occupancy was 72.9% — a year-over-year decrease of 1%. More growth is expected: 39,000-plus rooms will be added by the end of 2020.

The ADR grew by 4.4% and remained above $115 even during the slower months. Room rate peaked in March, with 11.4 million rooms sold at a daily average of nearly $184. September was lowest at $116.

Florida also shines brightest in regional and national comparisons, outpacing the South Atlantic and greater United States for Occupancy, RevPAR and ADR.

This year’s good news is the continuation of a five-year winning streak. Since 2014, Florida hotel occupancy has averaged 18% annual growth; Rooms Sold, 3% annual growth; and ADR, 4% annually.

HOTEL OCCUPANCY AND ADR
This chart compares Florida’s hotel industry against the values from the South Atlantic region and the U.S. in 2018.

OCCUPANCY RATES
This chart shows the five-year trend of Florida occupancy rates compared to U.S. rates.

AVERAGE DAILY ROOM RATE
This chart shows the five-year trend of Florida average daily room rates compared to U.S. rates.

REVENUE PER AVAILABLE ROOM
This chart shows the five-year trend of Florida revenue per available room compared to U.S. rates.

QUICK FACTS

• 87 new hotels opened in 2018, adding nearly 11,000 new rooms.
• More than 39,000 new hotel rooms are set to be completed by the end of 2020.

Respondents could select more than one state. The states shown generated the most responses.
TOURISM’S POWERFUL ECONOMIC IMPACT
OUT-OF-STATE VISITOR ECONOMY CONTINUES TO GROW

More than ever, out-of-state visitors remain vital contributors to the Florida economy. More than one in six Florida jobs is supported by tourism. Out-of-state visitation generates nearly 9% of the state economy. And since 2013, Florida’s tourism economy has been on a roll, with out-of-state tourism’s impact on Florida’s GDP up 19%.

Here are some other highlights:

• Every 81 visitors support one Florida job.
• Florida’s tourism-supported jobs increased by 2.9% in 2017, in the United States, the increase was 2.1%.
• Visitor spending on lodging in 2017 was up 4.1%.
• Visitors’ economic impact on Florida’s GDP increased by 3.2% in 2017.

High consumer confidence, low gasoline prices, employment, wage growth, as well as the attractiveness of Florida as a destination for both domestic and international travelers are factors contributing to growth in the visitor economy.

(Source: U.S. Travel Association)

All sectors of the Florida economy benefit from tourism either directly or through:

**Indirect Impacts** such as increased sales for local businesses who supply the tourism industry (e.g. supplier to the hotel that delivers goods and services and employs workers to meet the demand).

**Induced Impacts** such as increased sales for local businesses through resident spending of income earned in tourism and supporting sectors (e.g. the employees of the hotel supplier purchase goods and services at a household level, such as food, child care, and home insurance).

**TOURISM’S IMPACT ON GDP**

<table>
<thead>
<tr>
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<th>(in billions)</th>
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<tbody>
<tr>
<td>Direct</td>
<td>$44.3B</td>
</tr>
<tr>
<td>Induced</td>
<td>$22.7B</td>
</tr>
<tr>
<td>Indirect</td>
<td>$18.8B</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$85.9B</strong></td>
</tr>
</tbody>
</table>

(Source: Rockport Analytics)

**TOURISM’S CONTRIBUTION TO FLORIDA’S GDP**

This chart shows the amount that out-of-state visitors contribute to Florida’s economy each year.

<table>
<thead>
<tr>
<th>Year</th>
<th>GDP (in billions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>$72.0</td>
</tr>
<tr>
<td>2014</td>
<td>$77.9</td>
</tr>
<tr>
<td>2015</td>
<td>$80.2</td>
</tr>
<tr>
<td>2016</td>
<td>$83.2</td>
</tr>
<tr>
<td>2017</td>
<td>$85.9</td>
</tr>
</tbody>
</table>

(Source: Rockport Analytics)

**JOBS SUPPORTED BY OUT-OF-STATE VISITORS**

This chart shows the number of Floridians employed by the out-of-state tourism industry compared to total out-of-state visitor volume. As visitors increased, so have Florida jobs.

<table>
<thead>
<tr>
<th>Year</th>
<th>Jobs Supported</th>
<th>Visitor Volume</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>1.28</td>
<td>77.9</td>
</tr>
<tr>
<td>2014</td>
<td>1.33</td>
<td>85.9</td>
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<tr>
<td>2015</td>
<td>1.39</td>
<td>83.2</td>
</tr>
<tr>
<td>2016</td>
<td>1.41</td>
<td>80.2</td>
</tr>
<tr>
<td>2017</td>
<td>1.45</td>
<td>77.9</td>
</tr>
</tbody>
</table>

(Source: Rockport Analytics)

**QUICK FACTS**

• Out-of-state visitors supported nearly 1.5 million Florida jobs in 2017, with an associated income of $55 billion.
• From 2013 - 2017, Florida tourism-supported jobs grew by 13.3%. That rate was higher than overall job growth in both the US (7.4%) and in Florida (12.9%).
• Out-of-state tourism in Florida generated $11.4 billion in state and local taxes and $13.3 billion in federal taxes in 2017.
• Tourism keeps Florida’s taxes low. Visitors save every Florida household $1,511/year in taxes.
• According to the Florida Legislature’s chief economist, tourism accounted for 12.9% or $3 billion of total state sales tax collections.
• Bed taxes in rural counties have grown nearly 50% faster than in urban counties since 2012, according to the Florida Department of Revenue.
FLORIDA VISITORS

WHERE DO FLORIDA’S VISITORS ORIGINATE? HOW ARE THEY GETTING HERE? WHAT ARE THEIR FAVORITE FLORIDA ACTIVITIES AND DESTINATIONS? COMBINE THIS ATTENTION TO DATA WITH VALUABLE INPUT FROM TOURISM INDUSTRY LEADERSHIP AND THE RESULT IS A RECORD 124 MILLION VISITORS IN 2018 – WITH 110 MILLION, OR 89%, OF THOSE VISITORS FROM THE UNITED STATES.

FLORIDA attracts vacationers from all 50 states, but more than two-thirds (70%) of those visitors come from 15 states, all but two of them east of the Mississippi River.

In 2017, Florida experienced the largest increases in share from Missouri, Maryland, Tennessee, and Virginia. Visitors west of the Mississippi also have played a significant role in Florida’s record run. From 2013 to 2017, their share of domestic visitor volume has increased from 20.3% to 22.5%.

Examining mode of travel, the data shows more non-air travelers coming to Florida (an increase of 4.7 million from 2017 to 2018) and a willingness to cover greater distances to get here. The average round-trip distance is nearly 2,000 miles. There were 15 million more air visitors from 2017 to 2018, as demand rose to the supply. Available flights from the United States into Florida have increased by 16% since 2013.

DOMESTIC MARKET

THE GREAT MAJORITY OF FLORIDA’S VISITORS LIVE IN THE U.S.

In this section, we explore demographic data about Florida’s visitors, including age, family composition, and closing the seasonality gap.

FLORIDA’S SUPER SIX MARKETS

Among metropolitan areas, New York City, Atlanta, Philadelphia, Chicago, Washington, D.C., and Boston are the greatest contributors to Florida’s visitor numbers. These Super Six DMAs (Designated Market Areas) account for nearly one-third of Florida’s domestic volume. Nine secondary markets, including four metros west of the Mississippi River, contribute 16% of Florida’s visitors. A year-over-year increase of nearly 2 points in share among these secondary markets meant an additional 1.9 million visitors.

FLORIDA’S VISITORS FROM TOP 15 STATES

TABLE: FLORIDA’S SUPER SIX MARKETS

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<tbody>
<tr>
<td>11.1% 10.5% 0.6%</td>
<td>6.7% 7.0% 0.4%</td>
<td>3.2% 3.2% 0.5%</td>
<td>3.8% 3.6% -0.2%</td>
<td>2.9% 2.9% 0.0%</td>
<td>2.8% 2.8% -0.1%</td>
</tr>
</tbody>
</table>

TABLE: SECONDARY DMAS

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<thead>
<tr>
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<tbody>
<tr>
<td>1.6% 2.4% 0.8%</td>
<td>1.6% 2.1% 0.5%</td>
<td>2.3% 2.0% -0.2%</td>
<td>1.4% 1.6% 0.2%</td>
<td>1.6% 1.6% -0.2%</td>
<td>1.5% 1.6% 0.6%</td>
<td>1.3% 1.6% 0.3%</td>
<td>1.1% 1.5% 0.5%</td>
<td>1.7% 1.5% -0.2%</td>
</tr>
</tbody>
</table>

Source: D.K. Shifflet & Associates

*percentage point
SUPER SIX MARKET SNAPSHOT

New York City
- New York City remained Florida’s top DMA in 2017 despite a 4.8% decrease in volume and a share decrease of 0.6 points to 10.5%.
- New York City ranks as the No. 1 DMA for VISIT FLORIDA’s Family, Experience, Adventure, Winter, and Impulse Getaway audience segments.
- Nearly one in three of Florida’s leisure visitors from New York City come in the spring and their top activity is visiting friends and relatives.
- The New York metropolitan area has the largest population in the U.S. at 20.3 million.

Atlanta
- Atlanta, Florida’s number two origin DMA, is the top drive market.
- Visitors from Atlanta have the shortest average length of stay compared to the other Super Six DMAs.
- More than 20% of all leisure travel parties from Atlanta are traveling with children.

Philadelphia
- Philadelphia is Florida’s number three origin market for domestic visitors.
- Almost half of the visitors from Philadelphia are Baby Boomers – the largest share of that generation among the Super Six DMAs.
- The top activities for visitors from Philadelphia are going to the beach, visiting friends and relatives, and culinary or dining experiences.

Chicago
- Chicago is Florida’s number four origin market, accounting for nearly 4% of Florida’s domestic visitors. Chicago is the second-most popular air market, representing 6% of Florida’s domestic air visitors.
- The majority of Florida’s visitors from Chicago come in spring and summer.
- More than one in three of Florida’s leisure visitors from Chicago are GenXers – the highest share among the Super Six. Nearly a fourth of Florida’s visitors from Chicago are Affluent Families.

Washington, D.C.
- Leisure visitors from this DMA have the highest average household income ($142,700) among the Super Six.
- Nearly one in four of Florida’s leisure visitors from Washington, D.C. is a Millennial – the greatest share compared to the other top six markets.
- The majority of visitors from Washington, D.C. are traveling alone.

Boston
- Boston is Florida’s number six origin market for domestic visitors.
- Nearly one-third of Florida’s leisure visitors from Boston come in the spring.
- 55% of Boston’s visitors fly to Florida and Boston is the fourth-largest origin market for domestic air visitors.
- Among the top six markets, Boston leisure visitors have the longest average length of stay at 5.2 nights – up from 4.9 nights the previous year.

Florida’s Secondary Markets
- Nashville, Houston, Detroit, Indianapolis, Dallas, Raleigh, Baltimore, St. Louis, and Los Angeles account for 16% of Florida’s domestic visitation – an increase of nearly 2 percentage points from the previous year.
- Nashville, Tenn., for a second consecutive year had the largest share increase, with the Nashville market increasing from 1.6% of Florida’s domestic visitation in 2016 to 2.4% in 2017.
- St. Louis, Mo., became one of Florida’s top 15 origin markets for the first time in 2017.
- Among Florida’s Super Six and secondary markets, Dallas-Fort Worth has the highest percentage of leisure travelers visiting Florida in the summer. The majority of Florida’s visitors from this origin market are young families.

DEMOGRAPHICS

LIFESTAGE SEGMENTS

Florida’s domestic visitors represent a diverse portfolio of generational cohorts, income levels, family composition, and ethnicities. Florida tracks visitor volume, spending, and other patterns by lifestyle segmentation. Lifestyle categories combine three variables (age, household income, and the presence of children in the household) to create seven segments that are most likely to differentiate visitors.

The most recent data around lifestyle segments shows highlights and challenges. The Sunshine State attracts a greater share of the mature audience (55-and-older) than all other U.S. destinations combined. Families remain an important segment to Florida and their overall visitor volume grew from 2016 to 2017. But Florida lost ground with two segments that have no children, Young and Free (18-34 years old) and Maturing and Free (35-54 years old) account for nearly one-third of all U.S. travelers.

LIFESTAGE SEGMENT COMPOSITION

This chart shows the share of domestic visitors to Florida by lifestage.

COMPARISON OF U.S. AND FLORIDA TRAVELERS

This chart shows the share of U.S. travelers by lifestage compared to the share of Florida’s visitors by lifestage.

Lifestyle Definitions
- Young & Free (18-34; any income; no kids)
- Young Family (18-34; any income; kids in HH)
- Maturing & Free (35-54; any income; no kids)
- Moderate Family (35-54; <$75K; kids in HH)
- Affluent Family (55 or older; $100K+; kids in HH)
- Moderate Mature (55 or older; <$100K; no kids)
- Affluent Mature (55 or older; $100K+; no kids)

LIFESTAGE SEGMENT DEFINITIONS

Moderate Mature
- (55 or older; $100K+; no kids)
- 21%

Moderate Family
- (35-54; <$75K; kids in HH)
- 16%

Maturing & Free
- (35-54; any income; no kids)
- 13%

Young Family
- (18-34; any income; kids in HH)
- 16%

Affluent Mature
- (55 or older; $100K+; no kids)
- 17%

Affluent Family
- (55 or older; $100K+; kids in HH)
- 16%

Young & Free
- (18-34; any income; no kids)
- 13%

Source: D.K. Shifflet & Associates
Florida is recognized globally as a family vacation destination. One-third of Florida’s domestic visitors have children in the household – a higher share than U.S. travelers as a whole. The U.S. Travel Association’s 2018 Domestic Travel Market Report affirms that family tourism is increasing, so competition for these travelers will remain fierce and marketing campaigns that target them will be critically important.

2017 was a bounceback year for Florida’s family travelers, with that audience segment adding more than 3 million to its Florida visitor volume. In 2018, 44% of family travelers interested in visiting Florida had children under 18 in their household. In response to that data, VISIT FLORIDA increased its investment in the targeting of family travelers as a whole.

In 2018, 44% of family travelers with that audience segment adding more than 3 million visitors to its Florida visitor volume. 2017 was a bounceback year for Florida’s family travelers, with that audience segment adding more than 3 million to its Florida visitor volume.

**DOMESTIC VISITORS BY AGE AND FAMILY COMPOSITION**

This chart shows that in 2017, Non-Family Lifestages (those with no children in the household) made up 67% of Florida’s domestic visitors. This chart also shows that in 2017, the Maven’s Lifelogs (64 and older) represented 12% of the 19% of Florida’s domestic visitors.

**BABY BOOMERS ON THE RISE**

Florida’s visitors span the generations. Boomers and Generation X together represent nearly 70% of visitors to the state. In 2017, the share of 55-and-older visitors overtook those 35-54 for the first time and now accounts for the largest share of Florida’s domestic audience. Given 2017’s substantial rise in overall visitor volume, Florida gained visitors from each generation except Silent/G.I. But Millennials were the only generation to experience an increase in share – up 2 percentage points – prompting share shifts elsewhere. Looking ahead, as Millennials age and start families, visitor volume is expected to rise as more and more travel parties include children.

**DOMESTIC VISITOR VOLUME BY GENERATION**

This chart tracks Florida’s visitors by generational cohort over the past five years.

**GENERATION OF U.S. TRAVELERS VS. FLORIDA TRAVELERS**

This chart shows the breakdown by generation of U.S. travelers compared to Florida travelers.

**THE IMPACT OF CRISIS ON OCCUPANCY**

Hurricane Michael was the third-strongest storm to ever make landfall in the United States. Its impact in Northwest Florida was devastating but covered significantly less geography than 2017’s Hurricane Irma, which had prompted a surge in hotel occupancy for emergency workers and displaced residents. The occupancy spike that occurred with Michael was much more limited geographically and in duration.

And then there was Red Tide, which peaked in September and besieged Southwest Florida for months.

The primary goal in a crisis response marketing effort is to protect Florida’s brand perception as a top travel destination and to ensure that travelers will continue to visit.

In 2017 and 2018, VISIT FLORIDA developed crisis response campaigns that targeted messaging, perceptions would have been damaged, visitation would have dropped, and Florida’s economy would have sustained an even greater blow. Instead, Florida continued its record run of tourism.

Given that many natural events occur during the fall, VISIT FLORIDA’s well-developed crisis response plan is an integral part of sustaining year-round visitation.

**CLOSING THE SEASONALITY GAP**

**IT’S ABOUT MORE THAN BACK TO SCHOOL**

Historically, early fall is Florida’s slowest season, a vacation lull that arrives with the new school year. The story of Fall 2018 had additional complications. VISIT FLORIDA works year-round to spur visitation in its slow season. Reducing the gap in hotel occupancy between the high Spring and the low Fall helps maintain year-round employment and increase cost efficiencies for local businesses. After four consecutive years of good news, the seasonality gap took a backward step in 2018.

In 2017, the difference between the busiest and slowest months was 17.9 percent – Florida’s best performance since VISIT FLORIDA began collecting this specific data.

In 2018, hotel occupancy in the busiest month, March, reached 85.2% – a record high. But September retreated to 62.5% occupancy, and the difference between the two months meant a swing of almost five percentage points in the wrong direction.

A widening gap was inevitable given the new standard set in March 2018, plus there was less demand for hotel rooms among first responders and displaced residents after Hurricane Michael than the previous year with Hurricane Irma.

**STATEWIDE OCCUPANCY GAP**

This chart shows the seasonal gap between the peak month (March) and the slowest month (September).

**IMPACT ON FLORIDA VACATION INTEREST**

This chart shows the impact of Hurricane Michael on interest in a Florida vacation.

In 2018, hotel occupancy in the busiest month, March, reached 85.2% – a record high. But September retreated to 62.5% occupancy, and the difference between the two months meant a swing of almost five percentage points in the wrong direction.

A widening gap was inevitable given the new standard set in March 2018, plus there was less demand for hotel rooms among first responders and displaced residents after Hurricane Michael than the previous year with Hurricane Irma.

In 2017, the difference between the busiest and slowest months was 17.9 percent – Florida’s best performance since VISIT FLORIDA began collecting this specific data.

In 2018, hotel occupancy in the busiest month, March, reached 85.2% – a record high. But September retreated to 62.5% occupancy, and the difference between the two months meant a swing of almost five percentage points in the wrong direction.
International visitors are vital to Florida tourism revenue. They stay longer and spend almost twice as much per person as domestic visitors.

In 2018, 14.3 million international visitors accounted for 11% of Florida’s visitor volume. These visitors contributed $15.2 billion to Florida’s GDP, or 17.7% of tourism’s impact on the state economy.

Since 2013, the strong dollar and volatile politics have depressed international visitation and foreign travel to the United States has grown at a slower rate than to the rest of the world – even declining in some years. In Florida, international visitation is off by 7% from its apex in 2013. But in 2017, three key international markets (Canada, Brazil, and Colombia) rebounded and the recovery appears to be spreading, with both the U.K. and Mexico showing growth in 2018.

Perspective is valuable. During these past eight years of record volume, international and domestic visitors have taken turns leading the way.

German visitor volume in 2018 was off by 9%. Germany tends to be resilient to economic swings and they prioritize vacations, making it a reliable source market. But German travelers also are more sensitive to political factors in their potential vacation destinations. For this reason, travel to the U.S. from Germany is expected to slow in the coming years.

China is the world’s largest outbound travel market and getting larger. Trips are more frequent and long-haul travel is no longer a once-in-a-lifetime occasion. Independent travelers, who plan their own vacations without the help of a tour operator, accounted for almost all of the increases in Chinese travel overseas. That growing segment now represents 40% of China’s outbound market.

China is forecast to be the No. 2 overseas source market for U.S. tourism by the end of 2022. Florida’s opportunity lies with those independent travelers who are seeking new destinations and experiences beyond the traditional U.S. gateways of California and New York.

**HERE IS THE CURRENT OUTLOOK FOR SEVERAL KEY INTERNATIONAL MARKETS:**

**Canada** remains Florida’s No. 1 international market, but competition from other vacation destinations has increased. While the exchange rate has stabilized, the lower value of the Canadian dollar will continue to affect auto trips. Marketing efforts must continue to address the currency exchange reality and counter the possibility of Florida fatigue.

**United Kingdom** outbound travel is sensitive to economic and political circumstances at home. British visitation weakened after Brexit passed and the subsequent decline in value of the pound compared to the U.S. dollar. Although signs of recovery appeared in 2018, the higher cost of visiting Florida, such as rising hotel and attractions rates, will be a challenge. Competitors also are spending more in the U.K. travel market to build awareness for their destinations. If Florida is to maintain its market share, in-country efforts must combat the rising cost of travel here and maintain Britons’ lifetime relationship with the Florida travel product.

**Argentina** and **Colombia** are spending more in the U.S. to build awareness for their destinations. If Florida is to maintain its market share, in-country efforts must combat the rising cost of travel here and maintain Britons’ lifetime relationship with the Florida travel product.

**Brazil** travel parties, on average, have a trip value of $3,766.**

**Brazil** visitors stay an average of 10.7 nights.

**Germany** tend to be resilient to economic swings and they prioritize vacations, making it a reliable source market. But German travelers also are more sensitive to political factors in their potential vacation destinations. For this reason, travel to the U.S. from Germany is expected to slow in the coming years.

**China** is the world’s largest outbound travel market and getting larger. Trips are more frequent and long-haul travel is no longer a once-in-a-lifetime occasion. Independent travelers, who plan their own vacations without the help of a tour operator, accounted for almost all of the increases in Chinese travel overseas. That growing segment now represents 40% of China’s outbound market.

China is forecast to be the No. 2 overseas source market for U.S. tourism by the end of 2022. Florida’s opportunity lies with those independent travelers who are seeking new destinations and experiences beyond the traditional U.S. gateways of California and New York.

**International Market Snapshots**

**Canada**
- The average trip value of a Canadian travel party visiting Florida is $1,948
- While the average trip value among Canadian families is $2,579 and Mature, $2,621.
- Canadian visitors stay an average of 21.2 nights.

**United Kingdom**
- The average trip value for a UK travel party is $2,581.
- Florida’s British visitors stay an average of 11.9 nights.

**Brazil**
- Brazilian travel parties, on average, have a trip value of $3,766.
- Brazilian visitors stay an average of 10.7 nights.

**Germany**
- The average trip value for a German travel party is $2,625.
- German travelers stay an average of 12.7 nights and travel widely throughout the state.

**Secondary Latine America**
- The average trip value of an Argentinean travel party is $3,180; Colombian, $1,887; and Mexican air visitors, $1,560.
- The average length of stay in Florida among Argentines and Colombians is 11.3 nights; and Mexican air visitors, 7.4 nights.

**China**
- The average trip value for a Chinese travel party is $3,465.
- While visiting the U.S., Chinese travelers stay in Florida an average of 14.2 nights.

**INTERNATIONAL MARKET SNAPSHOT**

**INTERNATIONAL VOLUME**

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume (in millions)</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
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<td>14.4*</td>
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<td>15.3</td>
<td>15.2</td>
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<td>Brazil</td>
<td>14.2</td>
<td>14.3</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Germany</td>
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<td>14.2</td>
<td>14.2</td>
<td>14.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Argentina</td>
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<td>14.2</td>
<td>14.2</td>
<td>14.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Colombia</td>
<td>14.1</td>
<td>14.2</td>
<td>14.2</td>
<td>14.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mexico</td>
<td>14.1</td>
<td>14.2</td>
<td>14.2</td>
<td>14.2</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*estimate is preliminary and subject to change

**INTERNATIONAL VOLUME (in millions)**

- The chart shows the five-year trend of international visitation.
Outbound travel to the U.S. is forecast to continue growing at an annual rate of 3% during the next five years.

French visits to Florida are rising, but our share of all French travelers to the United States is 16.6% - well off Florida’s 24% share of all Western European travelers.

**Snapshot:**
- The average trip value for a French travel party to Florida is $1,167.
- French travelers stay an average of 6.2 nights and 62% rent an automobile.

**Growth in outbound travel to the U.S. is forecast to hover slightly above 3% over the next five years.** In 2019, U.S. visits are expected to reach nearly 1.4 million (+2%). Florida’s market share of U.S. visits rose from 11.0% in 2014 to 11.9% in 2016, before dropping to 11.3% in 2017. Nearly half of Australians visiting the U.S. visit more than one state and 42% of Australians visiting the U.S. use a travel agency, potentially making them easier to target.

**U.S. visits have hovered around 1 million during the past few years and are forecast to surpass 11 million in 2019. Direct flights and capacity to Florida are scheduled to increase by more than 10%. Florida’s market share of U.S. visitors hit a high of 23.7% in 2017. With annual growth in U.S. visits expected to average 3% over the next five years, Florida will benefit if it maintains its market share.**

**Snapshot:**
- The average trip value for an Italian travel party visiting Florida is $2,383.
- Italian travelers stay in Florida an average of 9 nights.
- 58% of Florida’s Italian visitors obtain information from a travel agency.

**Chile is considered South America’s most stable and prosperous nation. In 2019, Chile’s GDP is forecast to increase 3.4% and disposable income is expected to rise 1.5%.

Outbound travel to the U.S. has grown 6% or more annually during 11 of the past 13 years and growth is expected to continue.**

**Snapshot:**
- The average trip value for a Spanish travel party visiting Florida is $1,406.
- Spaniards stay in Florida an average of 10.1 nights.

**The forecast for Indian travel to the U.S. is good: 5% growth over the next five years. Indian travelers often travel to multiple Florida destinations during their trip. Visiting friends or relatives (VFR) and traveling for business are a rich opportunity for marketing efforts and destination exploration.**

**Snapshot:**
- The average trip value for an Indian travel party to Florida is $963 - a smaller number by comparison because 71% of Indians travel alone and often stay with friends or relatives.
- Indian travelers stay in Florida an average of 11.6 nights.
- 36% of Florida’s Indian visitors are traveling for business and 22% visit friends and/or relatives.

**Outbound travel to the U.S. is forecast to continue growing through 2023. Florida’s market share of Spaniards visiting the U.S. rose from 12.7% in 2012 to a high of 27.5% in 2016, before dropping to 20.1% in 2017.**

**Snapshot:**
- The average trip value for a Spanish travel party visiting Florida is $1,406.
- Spaniards stay in Florida an average of 10.1 nights.

**These charts show visits to the U.S. with Florida’s market share.**

**U.S. Visits Forecast**
- **Other States**
- **Florida Market Share**

**GULF COOPERATION COUNCIL (GCC)**

The GCC is comprised of six countries: Saudi Arabia, Kuwait, Bahrain, Qatar, Oman, and the United Arab Emirates.

**Outbound travel from the GCC is on a steady growth path and estimated outbound travel spend is forecast to exceed $140 billion by 2025. GCC leisure travelers take long vacations, on average lasting 21-42 days and extensions by Middle Eastern airlines over the past few years have made it easier to reach new destinations.**

**ISRAEL**

Outbound travel to the U.S. is forecast to grow over the next few years. According to data on overseas visitors to Florida obtained from the National Travel and Tourism Office, Florida’s market share to the U.S. is 17.3%. Florida could capture more Israeli travelers, especially with the growth potential of a new direct flight from Tel Aviv to Orlando and increasing demand for the existing Tel Aviv-Miami flight.**
INSIGHTS & CONSIDERATIONS

WHAT LIES AHEAD
Florida is one of the world’s leading destinations, riding the crest of eight consecutive record years of tourism. But will eight become nine? The reality is that external factors plus VISIT FLORIDA’s new budget limitations will pose challenges to sustainability. Here are six narratives that will likely impact VISIT FLORIDA’s ability to drive visitation.

RESURGENCE OF U.S. TRAVEL AGENTS
Travel agents are back in fashion. There was a time recently when they were considered dinosaurs, when the majority view was that the abundance of digital, consumer-facing booking options would push travel agencies into extinction. But Phocuswright reports that personal networks and relationships, destination knowledge, and planning expertise matter.

Hail the travel advisor (as they now prefer to be called).
“Leisure agents are specialists,” Phocuswright says. “They are communicating constantly with their customer network via mobile devices, social media, whatever works. Personal relationships are playing into agents’ hands, since this shows they’re truly the keepers of the keys to lucrative leisure travelers.”

Millennials know this, according to Forbes. They appreciate “the expertise of a travel advisor, seeing them as they might see a personal trainer for fitness expertise or a nutritionist.” According to Vox, Millennials tend to be short on time but not money, so they reach out for help. Also, because of the contradictory nature of online reviews, Millennials trust the advice they are getting from travel pros.

Phocuswright research data confirms the renaissance. At 30%, travel agencies are the single largest sales channel in the travel industry, followed by supplier-direct website bookings (28%) and OTAs (18%). By 2021, website bookings are expected to rank first, but travel agency bookings are predicted to continue growing 2-3% annually.

For Florida tourism, travel advisors remain vital word-of-mouth storytellers on our behalf, and a strong opportunity for growth. They remind potential visitors that in addition to the Florida sunshine, beaches and theme parks, there are cultures and cuisines and lesser-known experiences waiting to be discovered.

LAST-MINUTE TRAVELERS: CATCH THEM WHEN WE CAN
Think of our Impulse Getaway segment, but even younger. These are the DIY travelers. 40% are under age 35 and they are tech-first operators. They book everything - transportation, lodging, event tickets - and they execute their plans two weeks and often less before their trip.

These last-minute travelers, or LMTs, have a preference for nature and the outdoors. Roughly a third of this segment make national/state parks and beaches their primary destinations. That’s two boxes checked for Florida.

But LMTs come and go in a blink; their trips are 1-3 days in length. And nearly half stay with friends. Also:

• They prefer booking through OTAs, particularly Expedia.
• They are careful spenders, but more than half can be swayed through travel deals and bundles.

Given the nature of how they plan and decide in the moment, this audience can be a lever that helps tourism businesses quickly respond to unexpected recent performance. An emotional connection with this audience might be an always-on strategy that emphasizes everyone’s need for an occasional break, and Florida is that source of wellness.

Once in location, LMTs are most likely to rely on word-of-mouth recommendations. We can make it easier for them with targeted advertising and personalization. The in-person experience needs to feel customized to fulfill Florida’s hospitality promise and improve the odds of a return visit.

LURE OF INTERNATIONAL TRAVEL

REDEFINING FAMILY TRAVEL

RESPONDING TO OVERTOURISM

WHY MARKETING MATTERS
THE LURE OF INTERNATIONAL TRAVEL

More and more, U.S. travelers are looking across borders and overseas. The dollar is strong. Airfares are down. Available flights have increased.

Since 2014, U.S. outbound travel is averaging 9% annual growth. In 2018, 93 million Americans traveled internationally, with the leading preferences being Europe, Mexico and Canada.

Further, 52% of Millennials intend to take one or more international trips during the next 12 months. Remember that Millennials represent the largest portion of the U.S. traveling population and Florida has struggled at times to get their attention.

This ability to look elsewhere for a vacation – more than 86 percent of these trips are for leisure – means more competition for Florida tourism.

These Millennial travelers celebrate and search for the differences among us, hence their broader world view. VISIT FLORIDA marketing campaigns stoke that curiosity with stories of local cultures and culinary discoveries, as told by Florida artisans and entrepreneurs who look and think like these travelers. Florida must tailor the message to this audience to shift traveler perception from their grandparents’ vacation spot to a destination worthy of their attention.

RESPONDING TO OVERTOURISM

Overtourism is plaguing some of the world’s greatest destinations. Residents of Venice, Amsterdam, Barcelona, and Santorini are protesting the growing number of visitors while those same visitors leave dissatisfied with their overcrowded experience. Europe has been hit hardest by the stress of increased travel and tourism, and Florida must pay attention.

As one of the top destinations in the world with continued record visitor growth, overtourism is a legitimate concern as crowds and traffic stress the state’s most popular destinations and threaten to sour vacation experiences. But what can be done to head off this problem?

Florida can protect its lead by improving collaboration among key stakeholders – locals and governmental entities – to better serve the interests of communities instead of solely promoting rampant visitation growth. The economic prosperity delivered by the Florida tourism industry should not come at the expense of local residents’ quality of life.

VISIT FLORIDA, local destination marketing organizations, and businesses within the state tourism industry must understand residents’ concerns at ground level in order to better plan infrastructure and destination experiences according to the limits of change. Annual tourism performance goals should focus on the right kind of visitors, not just more visitors. It is time to double down on promoting unexplored Florida – lesser-known destinations that can handle an influx of tourists.

Focusing on sustainable tourism will put Florida in position for continued and purposeful growth in the long run, but the Florida tourism industry needs help. Protecting one of the state’s top economic drivers will require buy-in from public, private, and governmental stakeholders across the state.

REDEFINING FAMILY TRAVEL

What has been a growth trend for several years now appears to be a fact of life. The makeup of American families has shifted:

- The number of solo-parent households has increased to just over 30%, according to the United States Census Bureau.
- 20% of Americans live in multigenerational households. Most of these families are non-white, reflecting the growing diversity of the U.S. population.
- Millennials are the driving force behind these data points.

Catering to these niche markets is a rich opportunity for Florida tourism. As a destination known for its appeal to families, Florida has lead the way as a better representative and serve the diverse needs of this audience segment.

Campaign messaging and imagery should reflect what families look like in America and more should be done to ensure that these “non-traditional” families are encouraged to travel here by creating products and experiences that fit their needs. For example, businesses could provide unique pricing programs for lone-parent families and skip-gen family travelers that don’t penalize them for being different. Specialized services could address the unique needs of the caregivers – like a hotel nanny program that is a standard amenity similar to a gym or spa service; or dining packages that work for all kinds of tastes and diet restrictions.

Families are a lucrative travel segment and a bedrock audience for Florida tourism. They come here for the beaches and attractions, of course; they keep coming back because effective tourism marketing reminds them how Florida destinations are paying attention to who they are and what they need.

WHY MARKETING MATTERS

Travel and Tourism is a key sector for economic development and job creation throughout the world. In 2018, tourism made up more than 10% of the global economy. And in the coming years, the tourism economy is expected to continue to grow at a faster rate than the global economy as a whole.

In 2017-18, the 50 state DMOS spent $959 million promoting their destinations – a 45% increase since 2009-10. Rival destinations have studied Florida’s eight-year run of record visitation and are emulating VISIT FLORIDA’s marketing approach and tactics.

A smaller VISIT FLORIDA budget will rule out an always-on marketing strategy and Florida’s ability to reach potential travelers through high-impact advertising channels. Given the intense competition for visitors, we know that when Florida is out of sight, Florida as a destination is out of the consideration set. The Pennsylvania, Colorada, and Texas tourism experiences suggest that Florida will struggle to remain competitive, that the streak of record years will end, that jobs will be lost.

The history of Florida tourism, especially in this decade, shows the wisdom and effectiveness of an industry and the state working together for a common goal.

2017-2018 TOP TEN STATE MARKETING BUDGETS

Half of the combined DMO spend comes from these top 10 states.

<table>
<thead>
<tr>
<th>STATE</th>
<th>TOTAL BUDGET</th>
</tr>
</thead>
<tbody>
<tr>
<td>California</td>
<td>$120M</td>
</tr>
<tr>
<td>Hawaii</td>
<td>$92M</td>
</tr>
<tr>
<td>Florida</td>
<td>$76M</td>
</tr>
<tr>
<td>New York</td>
<td>$70M</td>
</tr>
<tr>
<td>Illinois</td>
<td>$37M</td>
</tr>
<tr>
<td>Michigan</td>
<td>$35M</td>
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<tr>
<td>Oregon</td>
<td>$33M</td>
</tr>
<tr>
<td>Utah</td>
<td>$22M</td>
</tr>
<tr>
<td>Colorado</td>
<td>$22M</td>
</tr>
<tr>
<td>Arizona</td>
<td>$22M</td>
</tr>
</tbody>
</table>

Source: U.S. Travel Association

U.S. CITIZENS’ INTERNATIONAL TRAVEL

This chart shows U.S. citizens outbound travel to overseas destinations, Mexico and Canada.

Why Florida will ski as it stands (in millions)

<table>
<thead>
<tr>
<th>Year</th>
<th>Florida</th>
<th>Mexico</th>
<th>Canada</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>17.2M</td>
<td>11.9M</td>
<td>15.5M</td>
</tr>
<tr>
<td>2016</td>
<td>20.4M</td>
<td>13.5M</td>
<td>16.2M</td>
</tr>
<tr>
<td>2017</td>
<td>20.1M</td>
<td>13.8M</td>
<td>16.3M</td>
</tr>
</tbody>
</table>

Source: National Travel & Tourism Office
As a mature destination hosting 124.7 million non-resident visitors a year, Florida attracts travelers from a wide variety of consumer segments and geographic origins. Understanding and effectively communicating with these consumers, based on their individual preferences, is critical to Florida’s success as a tourism destination.

A budget cut by 34% will necessitate changes in priorities and asset allocation, but the goal remains the same: Maintain the record results of the past eight years. Some origin markets, demographics, and psychographics will become more important and some will be paused. Our go-to-market strategies will shift. VISIT FLORIDA will constantly monitor and evaluate resources, programs, and performance to optimize against the organization’s goals. The opportunities are great and our success is made more likely by aligning the goals and efforts of Florida’s tourism industry. The power of a united travel industry is undeniable and more important than ever.
MARKETING APPROACH

For planning purposes, below is a high-level overview of VISIT FLORIDA’s FY 19-20 market approach. This plan and the tactics that follow are subject to change based on VISIT FLORIDA’s FY 19-20 level of funding and strategic initiatives.

Note: VISIT FLORIDA’s fiscal year begins in July and ends in June the following calendar year.

### Travel Trade & Meetings

- **Florida Huddle**
- **Central East Brazil Roadshow**
- **POST Florida Huddle**
- **WTM Latin America**
- **IPW**
- **Mexico Sales Mission**
- **UK Summer Event**
- **WTM London**
- **Brand USA Roadshow (MX)**
- **ITB Brazil**
- **Floridiana)**
- **USA Trade Shows**
- **Brand USA Trade Shows**
- **WTA**
- **Germany Sales Mission**
- **Central East Brazil Roadshow**
- **ITB Southeastern Europe (Croatia)**
- **IPW**
- **WTM London**
- **Florida Meeting Event**
- **Germany Sales Mission**

### Content

- **Travel Trade & Meetings**
- **Public Relations**
- **Promotions**
- **Social**
- **International Cooperative Marketing**
- **ALWAYS ON**

### Traveler Profile

#### Length of Stay

- **Winter Travelers**
- **Families**
- **Impulse Getaways**
- **Adventure**
- **Experience**

#### Seasonality

- **Winter Visitors**
- **Family Profile**
- **Impulse Getaway Profile**

#### Transportation Mode

- **Non-Air**
- **Airplane**

#### Age of Parent

- **18 - 34 years Old**
- **35 - 49 years Old**
- **50 - 64 years Old**
- **65+ years Old**

#### Lodging Type

- **Paid Accommodation**
- **Hotel**
- **Non-Hotel**
- **Non-Paid Accommodation**

#### Generation

- **Silent/G.I.**
- **Baby Boomer**
- **GenX**
- **Millennial**

#### Experience and Adventure Seekers Profiles

- **Florida**
- **All U.S.**

#### Trip Planning Time Frame

- **Less than 1 month**
- **1 - 2 months**
- **3 - 6 months**
- **6 months or more**

#### Primary/Secondary Trip Motivations

- **Visiting friends/relatives**
- **Beach**
- **Shopping**
- **Theme/Amusement/Water park**
- **Fine Dining**

#### Advantages of Florida Activities

- **Beach**
- **State/National park/recreation areas**
- **Shopping**
- **Theme/Amusement/Water park**
- **Musical performance/show**
- **Art galleries**
- **Urban sightseeing**
MARKETING TACTICS

STRATEGY 1: DRIVE DEMAND

- Create integrated audience campaigns in top domestic markets
- Create co-op programs aligned with VISIT FLORIDA’s overarching marketing objectives
- Develop and sustain marketing partnerships that increase reach and relevance
- Maintain ongoing search presence (SEO/SEM)
- Leverage VISIT FLORIDA content for domestic marketing campaigns
- Align collaborative pitching with press visits and media relations
- Build and sustain relations with global media and social influencers
- Collaborate with DMO partners to pitch stories and host media visits that yield a larger awareness footprint to the state
- Create influencer campaigns to reach social communities in order to promote awareness, engagement and advocacy
- Leverage best-in-class partnerships to extend the Florida Meetings message through larger channels
- Coordinate promotions in key global markets to maintain high-level Florida brand awareness

STRATEGY 2: INCREASE YIELD

- Create integrated campaigns in top international markets
- Execute trade media and consumer media relations at international events
- Develop and maintain relationships with tour operators and travel agents in key international markets
- Coordinate international trade FAMs throughout the year for key markets
- Promote educational programming for travel trade
- Build relationships with influential global product managers
- Increase relevance of VISIT FLORIDA-owned and -operated events such as Florida Huddle and Florida Encounter
- Develop and maintain relationships with airlines and airports to support route development
- Coordinate promotions featuring unique experiences, less traveled destinations and multi-destination prize packages
- Develop and distribute content promoting lesser known destinations and experiences
- Leverage expertise of Welcome Center staff to educate and serve Florida visitors

STRATEGY 3: BRAND ENGAGEMENT

- Promote engagement with #LoveFL across different audiences and passions
- Leverage social conversations to build brand engagement and advocacy
- Develop opportunities to connect with Florida visitors while they are traveling
- Foster social conversations related to Florida travel experiences

STRATEGY 4: INDUSTRY ALIGNMENT

- Engage with and educate Partners through marketing consultations and sales calls
- Continuously promote VISIT FLORIDA programs and partnership opportunities through social channels, direct mail campaigns and in-person events
- Enhance Partner benefits platform to provide more exclusive opportunities for VISIT FLORIDA Marketing Partners
- Develop programs and webinars that deliver education/thought leadership to the industry
- Invest in developing tools and resources that drive Partner retention and demonstrate value of participation
- Increase the value of co-op to Partners by developing year-round, non-traditional and bundled packages
- Create, manage and distribute corporate messaging to improve alignment with the Florida Tourism Industry
- Manage all crisis communication efforts and provide industry direction and support as needed
- Facilitate international co-op opportunities for Partners, leveraging the Florida Brand
- Create unique Partner opportunities at trade shows and signature events
- Promote a statewide customer service training and certification program for Welcome Center partners
- Promote engagement with #LoveFL across different audiences and passions
- Leverage social conversations to build brand engagement and advocacy
- Develop opportunities to connect with Florida visitors while they are traveling
- Foster social conversations related to Florida travel experiences
DEPARTMENT PROJECT PLANS

BRAND

- Lead the planning, development and execution of five different integrated consumer audience campaigns
- Build upon an integrated campaign strategy to further strengthen Florida’s market share in international markets
- Ongoing focus and growth of Share a Little Sunshine, Florida’s advocate community
- Continue to optimize the refreshed Florida tourism brand
- Evolve VISIT FLORIDA’s corporate brand

CONTENT

- Regularly create and publish new videos and articles based on desires of potential travelers
- Optimize and expand search performance for Florida content
- Develop content to enrich VISIT FLORIDA’s integrated audience campaigns
- Enhance user experience with VISIT FLORIDA owned content to better serve potential visitors and Partners
- Develop and distribute content for niche and underserved travel audiences

INTERNATIONAL MARKETING

- Further develop the cooperative marketing model and program
- Focus on more customized industry communication and consultation to deepen alignment and value for Partners
- Enhance industry education and engagement opportunities through new technology
- Improve Partner engagement reporting
- Execute Targeted Marketing Assistance Program and industry grant offerings
- Improve experience and value for VISIT FLORIDA signature event sponsors
- Grow partner base and retention rate
- Restructure Strategic Alliance Partnership program

CORPORATE MEETINGS

- Integrate VISIT FLORIDA signature events with industry Meetings & Conventions
- Develop and improve relationships with Partners, including creating more opportunities to attend industry Meetings & Conventions
- Develop a marketing campaign to promote meetings in Florida and Florida Encounter
- Identify opportunities to provide the best attendee experience for all VISIT FLORIDA signature events
- Improve data collection process and ROI assessment

INDUSTRY RELATIONS, CO-OP & SALES

- Plan and purchase media for integrated North American marketing campaigns and international marketing campaigns
- Develop ongoing co-op opportunities for Partners aligned with key audiences
- Improve media performance tracking to enhance future media mix design
- Explore new and innovative media opportunities to keep VISIT FLORIDA at the forefront of destination marketing

PAID MEDIA

- UK Integrated Marketing Campaign
- Brazil Integrated Marketing Campaign
- Germany Integrated Marketing Campaign
- Expand digital presence in China
- Promote and expand Florida Travel Pro e-Learning platform
DEPARTMENT PROJECT PLANS

PROMOTIONS
- Coordinate promotions in key global markets
- Conduct relationship-building efforts in key global markets
- Execute promotions at a one-to-one match in media value

PUBLIC RELATIONS
- Conduct regionally-focused group familiarization tours and individual media and influencer familiarization tours
- Develop public relations initiatives to enhance North American integrated consumer audience campaigns
- Develop public relations initiatives to enhance international integrated marketing campaigns
- Improve VISIT FLORIDA’s media and influencer relationship development process to deepen connections with trade and consumer journalists and influencers

SOCIAL MEDIA
- Increase engagement with potential visitors across the globe
- Improved integration of social listening data to influence day-to-day social engagement and long-term audience planning
- Develop an industry-wide editorial calendar to better align Florida’s social conversations
- Execute social media influencer campaigns across the calendar year
- Launch and maintain a social media presence across key channels in China

TRAVEL TRADE
- Build relationships with North America travel agents in key markets to expand knowledge of undiscovered Florida experiences
- Promote and expand Florida Travel Pro e-Learning platform

RESEARCH
- Launch qualitative and behavioral consumer research studies
- Execute in-depth Florida research study for international markets
- Continue to test and optimize Florida’s refreshed brand creative
- Develop interactive dashboards to monitor economic and travel trends
- Deepen VISIT FLORIDA’s ability to track ROI across integrated marketing efforts