ABOUT VISIT FLORIDA

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

According to the Office of Economic and Demographic Research, for every $1 the state invests in VISIT FLORIDA, $3.20 in tax revenue is generated. Additional funding is secured from the private sector to expand VISIT FLORIDA’s marketing dollars. Last fiscal year, VISIT FLORIDA raised more than $120.1 million in private sector matching funds. This is done by actively recruiting the state’s tourism industry to invest as Partners through cooperative advertising campaigns, promotional programs and many other pay-to-play ventures. Through this public/private partnership, VISIT FLORIDA serves more than 12,000 tourism industry businesses, including major strategic alliance partnerships with Disney Destinations, The Hertz Corporation, LEGOLAND Florida Resort, SeaWorld Parks & Entertainment, Simon Shopping Destinations and Universal Orlando Resort.

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, meeting and event planners, and is responsible for operating Florida’s five Official Welcome Centers.

Learn more about VISIT FLORIDA: VISITFLORIDA.org
Follow our corporate blog: SunshineMatters.org

Mission:
To promote travel and drive visitation to and within Florida.

Vision:
VISIT FLORIDA establishes Florida as the No. 1 travel destination in the world.

Goals:
• Provide leadership to ensure the Florida tourism industry is competitive and sustainable.
• Become the trusted source of information that informs and inspires travel to and within Florida.
• Protect and grow Florida’s share of destination travel through integrated sales and marketing programs that drive visitation to and within Florida.
• Leverage VISIT FLORIDA resources through cooperative marketing programs that create and add value for Partners within and outside the Florida tourism industry.
• Put all VISIT FLORIDA resources to their highest and most productive uses to maximize operating efficiencies and the positive impact of all organizational efforts.
MORE THAN 98 MILLION STRONG
After a fourth consecutive year of record-breaking tourism, Florida is at the top of its game. 98.9 million visitors. Record occupancy levels. Sixty months of continuous job growth. Florida tourism has never been stronger.

However, there are serious challenges to maintaining our growth:
- Balancing the need for global brand building against the cost of creating a wider footprint
- Increasing competition from other U.S. markets for domestic and international visitors
- Changing traveler demographics and expectations
- The increasing complex but powerful co-op program
- A dynamic digital and social landscape

To prepare for these challenges, VISIT FLORIDA has begun development of a five-year comprehensive strategic plan. This plan will continue to evolve, but at its core are eight objectives that align the work of multiple departments and co-op programs:

2020 OBJECTIVES
1. Yield – Increase gross taxable sales through tourism.
2. Volume – Increase the number of visitors coming to Florida.
3. Share – Maintain our share of visitors from domestic and international markets while growing share in specific markets.
4. Brand Engagement – Build relationships with visitors through highly relevant content and experiences.
5. Destination Diversity – Grow economic activity throughout the state by encouraging visitation to geographically diverse destinations and participation in a broader range of activities.
6. Partner Participation – Improve Partner investment and engagement in VISIT FLORIDA programs.
7. Investment Efficiency – Optimize organization spending to deliver increased results in the most cost-effective way.
8. Influence – Grow perceived desirability and intent to travel to Florida.

All VISIT FLORIDA strategies and tactics outlined in this plan roll up to achieve these objectives.
MARKETING PRINCIPLES
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.

CREATE VALUE & ADD VALUE
- CO-OP IS CRITICAL
- CLARITY COMES FIRST
- SOMETHING FOR EVERYONE
- QUALITY VS. QUANTITY
- IF IT’S WORTH DOING, IT’S WORTH DOING RIGHT
- CONTENT IS CORE
- INNOVATION
- BEST-IN-CLASS PARTNERSHIPS

In order to ensure that VISIT FLORIDA is maximizing the impact of its marketing resources (money, time and relationships), the organization has adopted a set of Marketing Principles that drives all strategic thinking:

CREATE VALUE & ADD VALUE
Every VISIT FLORIDA program or initiative must create value and add value for travelers and 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.
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CO-OP IS CRITICAL
At its core, VISIT FLORIDA is a cooperative marketing company. Since 1996, industry partners have invested more than $1 billion in VISIT FLORIDA co-op marketing programs. Florida tourism industry Partners will have the opportunity to leverage VISIT FLORIDA’s investment in marketing programs to maximize the impact of their individual resources even as this joint effort increases the impact of the shared Florida brand.
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CLARITY COMES FIRST
VISIT FLORIDA must prioritize its time, energy and budget to maximize the impact of our efforts by focusing only on programs that create and add value for travelers and industry Partners. That means executing against a strategic plan with a tactical focus on co-op marketing and strategic marketing partnerships.
MARKETING PRINCIPLES

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SOMETHING FOR EVERYONE

There is a tendency in membership organizations to stick to the “Fairness Doctrine,” build programs to the lowest common denominator and provide the same benefits to all members in all cases. The result is often a marketing structure that tends toward mediocrity. VISIT FLORIDA represents an industry that is remarkable in its breadth and diversity and a “one size fits all” approach simply will not work. VISIT FLORIDA has made a strategic decision to strive to provide valuable programs for all Partners, while recognizing and communicating that not all programs will be a good fit for every Partner.
### MARKETING PRINCIPLES

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### QUALITY VS. QUANTITY

Size matters, but impact matters more. The impact of a promotion on consumer behavior is more important than the number of people the promotion reaches. For instance, how many incremental visitors to Florida were influenced in their decision making by the marketing efforts of VISIT FLORIDA and its Partners?
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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.
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CONTENT IS CORE

Regardless of whether stories are told in advertising, on VISITFLORIDA.com, social media, or any other traditional or digital media, stories that inspire travel to Florida are core to VISIT FLORIDA’s marketing efforts. VISIT FLORIDA is committed to creating, curating and distributing compelling stories, photographs and videos that tell the Florida travel experience.
MARKETING PRINCIPLES

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INNOVATION

VISIT FLORIDA is committed to building a culture of innovation that encourages staff and Partners to create more effective products, services and technologies to give Florida a competitive advantage in the global travel and tourism industry.
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BEST-IN-CLASS PARTNERSHIPS

Just as the Florida tourism industry expects VISIT FLORIDA to create and add value to their independent marketing efforts, VISIT FLORIDA expects our partners to create and add value to our internal efforts. As a result, VISIT FLORIDA has assembled a first-class team of marketing partners to help us do our job better. These advertising, public relations, digital development and publishing partners bring substantial resources and expertise to execute strategic marketing plans. Working with partners, VISIT FLORIDA is able to implement strategic co-op marketing that significantly leverages our budget and provides Partners with access to programs on a scale not otherwise possible.
MARKETING PLANNING PROCESS

As the official destination marketing organization charged with promoting Florida as a leisure travel and meetings destination, VISIT FLORIDA plans and implements a variety of sales and marketing initiatives. This strategic marketing plan is the road map that guides all VISIT FLORIDA sales and marketing efforts for 2015-16. The plan was developed by VISIT FLORIDA staff based on guidance and insight from the Florida tourism industry as represented by members of VISIT FLORIDA’s marketing committees, including:

• Advertising and Internet
• Communications
• Culture, Heritage, Rural & Nature
• Industry Relations
• International
• Promotions
• Meetings & Travel Trade
• Visitor Services

The 2015-16 marketing planning process began in December 2014 when representatives of Florida’s tourism industry, including members of the VISIT FLORIDA Board of Directors and committees, met at the annual Marketing Retreat to set industry priorities for VISIT FLORIDA’s marketing efforts.

Addressing near-term needs as well as long-term goals, the industry identified strategic marketing objectives and helped prioritize initiatives for inclusion in the 2015-16 marketing plan. With the strategic direction provided by the industry in general and by the individual marketing committees, staff developed a proposed marketing plan and budget. This plan was then vetted through each marketing committee, as well as the Marketing Council Steering Committee, and forwarded to the Board of Directors for consideration.

VISIT FLORIDA is currently engaged in long-term strategic planning.
ANOTHER YEAR, ANOTHER SET OF RECORDS

Over the past five years, Florida tourism volume has steadily climbed out of the trough of the recession, hitting an all-time high of more than 98 million visitors in 2014. During that five-year period, the volume of visitors increased an average of 4 percent. The bigger story for this time period is the increase in the number of international visitors. In 2009, international visitors represented 12 percent of the total volume, but in 2014 that percentage climbed to 16 percent.

2014 was a record year for total visitation with a year-over-year increase of 5 percent. Domestic volume produced a record year with an increase of 5.6 percent year over year and international volume also broke records producing a year-over-year increase of 2.4 percent.

This chart shows the total visitor volume to the state over the past 10 years.
**ANOTHER YEAR, ANOTHER SET OF RECORDS**

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DOMESTIC VACATIONERS
Florida continues to dominate leisure travel, capturing the largest share of U.S. vacationers of any state. At 16.2 percent of the total U.S. leisure travel market, Florida has its highest share in a decade.

While Florida has benefited from increased leisure travel and decades of building its brand, the competition for share is fierce and increasing. Over the past five years, investment by U.S. state tourism offices in domestic advertising has increased 10 percent. At the same time, Florida’s domestic visitors are more affluent than ever – which makes them a target for international competitors as well. Maintaining Florida’s current share will be a challenge.

FLORIDA’S MARKET SHARE (2004-2013)
This chart tracks Florida’s share of the domestic vacation travel market. In 2013, more than 16 percent of domestic vacation travelers vacationed in the Sunshine State.

Source: D.K. Shifflet and Associates
SOLID SUCCESS
Top-line hotel numbers convey the picture of a great year for tourism. Occupancy, ADR and RevPAR all rose significantly year over year for the U.S., the South Atlantic region and Florida. For Florida, the story is strong and steady demand growth linked to pricing power; with Florida occupancy levels at 69.7 percent, it is no surprise Florida RevPAR is up more than 10 percent.

HOTEL OCCUPANCY AND ADR (2014)
This chart compares Florida’s hotel industry against the values from the South Atlantic region and the U.S.

<table>
<thead>
<tr>
<th></th>
<th>2014 Occupancy</th>
<th>% Change</th>
<th>ADR</th>
<th>% Change</th>
<th>RevPAR</th>
<th>% Change</th>
<th>Room Revenue</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>64.4%</td>
<td>3.6%</td>
<td>$115.32</td>
<td>4.6%</td>
<td>$74.28</td>
<td>8.3%</td>
<td>4.5%</td>
<td></td>
</tr>
<tr>
<td>South Atlantic</td>
<td>64.8%</td>
<td>4.8%</td>
<td>$111.20</td>
<td>4.3%</td>
<td>$72.09</td>
<td>9.3%</td>
<td>5.4%</td>
<td></td>
</tr>
<tr>
<td>Florida</td>
<td>69.7%</td>
<td>4.4%</td>
<td>$124.96</td>
<td>5.7%</td>
<td>$87.07</td>
<td>10.3%</td>
<td>5.3%</td>
<td></td>
</tr>
</tbody>
</table>

Source: STR, Inc.
VISITOR MIX

As the economy regained solid footing after the recession, Florida experienced some changes in the composition of its visitors. Florida grew its share of the leisure market during difficult times, in part by attracting visitors with higher household incomes. Among domestic visitors, Florida now outperforms the U.S. in its capture of both affluent matures and affluent families.

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 (35-54; $75K+; kids in HH)
- Moderate Mature (55 or older; <$99K; no kids)
- Affluent Mature (55 or older; $100K+; no kids)

COMPARISON OF U.S. AND FLORIDA TRAVELERS BY LIFESTAGE (2013)

This chart shows the share of U.S. travelers by lifestyle compared to the share of Florida’s visitors by lifestyle. For example, 17 percent of U.S. travelers are in the Young & Free lifestyle compared to 13 percent of Florida visitors.

Source: D.K. Shifflet and Associates
VISITOR MIX

Historically, Florida’s visitors have higher household incomes than overall U.S. travelers and spend more on vacation. That pattern continues, but the gap between Florida and the U.S. has widened. Average expenditures per person per day for visitors to Florida has increased 9 percent since 2013 and 6 percent for overall domestic travelers.

NOW AND THEN: A SIX-YEAR COMPARISON

### Household Income

<table>
<thead>
<tr>
<th></th>
<th>2007</th>
<th>2013</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Florida Travelers: HH Incomes $100,000+</td>
<td>39%</td>
<td>45%</td>
<td>+6pp</td>
</tr>
<tr>
<td>U.S. Travelers: HH Incomes $100,000+</td>
<td>32%</td>
<td>36%</td>
<td>+4pp</td>
</tr>
<tr>
<td>Florida Travelers: HH Incomes under $75,000</td>
<td>45%</td>
<td>38%</td>
<td>-7pp</td>
</tr>
<tr>
<td>U.S. Travelers: HH Incomes under $75,000</td>
<td>52%</td>
<td>48%</td>
<td>-4pp</td>
</tr>
<tr>
<td>Florida Travelers: Average HH Income</td>
<td>$93,700</td>
<td>$110,100</td>
<td>18%</td>
</tr>
<tr>
<td>U.S. Travelers: Average HH Income</td>
<td>$86,500</td>
<td>$95,100</td>
<td>10%</td>
</tr>
<tr>
<td>U.S. Real median household income*</td>
<td>$56,436</td>
<td>$51,939</td>
<td>-8.0%</td>
</tr>
</tbody>
</table>

### Visitor Spending

<table>
<thead>
<tr>
<th></th>
<th>2007</th>
<th>2013</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average spending per person per day by FL travelers</td>
<td>$142.80</td>
<td>$155.90</td>
<td>▲ $13.10</td>
</tr>
<tr>
<td>Average spending per person per day by U.S. travelers</td>
<td>$85.70</td>
<td>$91.00</td>
<td>▲ $5.30</td>
</tr>
</tbody>
</table>

Source: *U.S. Census, D.K Shifflet & Associates
INCREASING OPPORTUNITY; INCREASING COMPETITION

Global outbound travel has seen significant increases in the past few years and that trend is reflected in Florida’s visitor mix and volume. In 2008, Florida welcomed visitors from 169 countries. By 2014, the number of international origin markets had grown to 188. In 2008, international was only 8 percent of Florida’s total volume, but by 2014 that share doubled.

Global outbound travel is projected to continue increasing. UNWTO Tourism Towards 2030 forecasts an average 3.3 percent increase for 2010-2030, with slower growth from comparatively mature destinations and more significant growth from emerging economies. With revenue at stake, competition also has increased. During the past five years, U.S. state tourism offices have increased their budgeted investment targeting international visitors by 40 percent.

NOW AND THEN: THE IMPACT OF INTERNATIONAL VISITORS

<table>
<thead>
<tr>
<th>International Visitor Volume</th>
<th>International Visitor Spending</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>2014*</td>
</tr>
<tr>
<td>11.1M</td>
<td>$11.6B</td>
</tr>
<tr>
<td>15.7M</td>
<td>$16.7B</td>
</tr>
</tbody>
</table>

* Preliminary
Source: VISIT FLORIDA
For the fourth consecutive year, Florida benefited from record-setting tourism levels. 2014 visitor numbers reached an all-time high of 98.9 million, excluding in-state resident travelers. Consistent with previous years, the majority of Florida’s visitors came from the United States – 83.2 million, up 5.6 percent year over year.

International visitors (overseas and Canada) also came in record numbers – up 2.4 percent to 15.7 million. International visitation has grown from 13.6 percent of total visitor volume in 2010 to nearly 16 percent for 2014.
VISITOR SPEND
PER PERSON / PER DAY
COMBINED BUSINESS AND LEISURE TRAVEL (2004-2013)

Source: VISIT FLORIDA
Note: Florida visitor spending lags behind volume data by one year. Volume and spend comparisons are for a general frame of reference and not a precise ratio.

IMPORTANCE
OF THE DOMESTIC MARKET

Visitors typically spend more when visiting Florida than other U.S. destinations. Historically, that difference contributes to the health of Florida’s tourism industry and the state economy. Between 2010 and 2011, Florida saw a precipitous decline in visitor spending that has now reversed itself. In 2013, the average spend per person per day was up 5 percent in Florida, keeping pace with the national average. Visitors to Florida spend 18 percent more than the average domestic traveler.
VISITOR VOLUME TRENDS

Domestic visitors have always been the dominant component of Florida’s visitor mix. 2014 was the first time this group exceeded 80 million, which is about a quarter of the U.S. population. Combined business and leisure travel increased for the fourth consecutive year, making 2014 visitor volume the highest ever recorded.
TRIP SPENDING TRENDS
Understanding the value of a visitor trip to Florida includes many interrelated factors: spending per day, length of stay and party size. Generally, Florida fares better on all three counts than the average U.S. destination. Between 2007 and 2011, the length of stay declined as did the related trip value. However, both increased in 2012 and appear to have stabilized.

Average Trip Value
Average trip value is the typical amount spent per visit by a travel party. To calculate, multiply the average per-day spending of each visitor, the total number of days on the trip and the number of visitors in the travel party. The average spending per person per day in 2013 was $155.90. The average stay was 5.15 days and the average party size was 2.1 persons.

Based on the latest available data (2013), the average value of a domestic visitor’s trip is $1,686.

Note: Florida visitor spending lags behind volume data by one year. Volume and spend comparisons are for a general frame of reference and not a precise ratio.
As Florida marches toward 100 million visitors and beyond, market segmentation is particularly important. Florida approaches its domestic audience in four ways: where potential visitors live and travel from; how they travel to Florida; what the purpose of their trip is; and what is known about them demographically. Insights from these four filters are combined in a variety of ways for strategic planning, targeting and messaging.
THE NATIONAL VIEW

Though Florida attracts visitors from all 50 states, more than half (56%) come from 10 states and most are east of the Mississippi. The top feeder states are Georgia, New York, Texas and New Jersey, with Ohio and Illinois tied for the fifth spot.

Highlights

- Steady increases in drive visitors have contributed to growth in markets such as Texas and North Carolina.

- Florida is seeing increases in travelers from Connecticut, Pennsylvania and North Carolina.

- Historically, Florida’s top feeder markets stay consistent, but in 2013, Ohio trended up and Illinois was down. Even so, Chicago still remains Florida’s No.3 DMA.
FLORIDA’S SUPER EIGHT MARKETS
Although Florida visitors come from all over the United States, eight metropolitan areas – Atlanta, Boston, Chicago, Dallas, Detroit, Philadelphia, New York City, and Washington, D.C. – are typically the greatest contributors to Florida’s visitor numbers. Combined, these Super Eight DMAs (Designated Market Areas) account for 38 percent of Florida’s domestic volume.

### DMA Market Snapshot

**NEW YORK, NY**
New York City remains Florida’s strongest feeder market and in 2013 enjoyed its biggest share in five years. New York is a strong couples and singles market. Nearly two-thirds of the visitors to Florida from New York do not have children in the household. New York visitors also have the highest average spend per person per day compared to the other Super Eight markets.

**Click DMA for snapshot**

<table>
<thead>
<tr>
<th>Rank</th>
<th>DMAs</th>
<th>2013 % of Florida’s Domestic Visitors</th>
<th>PP* change ’13/’12</th>
<th>Volume</th>
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</thead>
<tbody>
<tr>
<td>1.</td>
<td>New York, NY</td>
<td>11.7%</td>
<td>▲ +1.0 pp</td>
<td>▲</td>
</tr>
<tr>
<td>2.</td>
<td>Atlanta, GA</td>
<td>8.1%</td>
<td>▲ +0.5 pp</td>
<td>▲</td>
</tr>
<tr>
<td>3.</td>
<td>Chicago, IL</td>
<td>4.3%</td>
<td>- 0.0 pp</td>
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DMA Market Snapshot

ATLANTA, GA
Of all the markets in the Super Eight, Atlanta has the largest share of families visiting Florida. Atlanta’s share of visitors in 2013 also was the DMA’s biggest in five years. The top season is summer.

Click DMA for snapshot

### 2013 VISITOR VOLUME TOP ORIGIN DMAs
**COMBINED BUSINESS AND LEISURE**
This chart shows the share of Florida’s domestic visitors that come from each Super Eight market. The share of Florida visitors from New York City increased between 2012 and 2013.

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## DMA Market Snapshot

**CHICAGO, IL**

Chicago is a strong origin market for couples and singles. The top season to visit Florida is the fall. The majority of Florida visitors from Chicago are Boomers and a quarter are in the Affluent Family lifestage.

---

### 2013 VISITOR VOLUME TOP ORIGIN DMAs

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BOSTON, MA
Boston is a strong couples and Boomers market with traditionally strong visitation in the spring and winter. Visitors from Boston are mostly in the Affluent Mature lifestage, the highest percentage compared to the other Super Eight markets. Boston visitors also have the highest average household income of the Super Eight markets.

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### DMA Market Snapshot

**PHILADELPHIA, PA**

Philadelphia is a strong couples market and they tend to visit in the spring. Four of 10 visitors from Philadelphia are Boomers.

### 2013 VISITOR VOLUME TOP ORIGIN DMAs

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DMA Market Snapshot

DETROIT, MI
Detroit is a strong couples and families market. Florida's Detroit visitors have an average household income of $112,000. Most visitors come in the winter and more than half are Boomers.

Click DMA for snapshot

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Florida compares per person per day spend with and without transportation costs included. Visitors from New York City spent the most, at $153 per person per day including transportation. Visitors from Atlanta spent the least, at $105 per person per day including transportation.

DMA Market Snapshot

NEW YORK, NY
New York City remains Florida’s strongest feeder market and in 2013 enjoyed its biggest share in five years. New York is a strong couples and singles market. Nearly two-thirds of the visitors to Florida from New York have no children in the household. New York visitors also have the highest average spend per person per day compared to the other Super Eight markets.

Click DMA for snapshot

2013 VISITOR SPEND TOP ORIGIN DMAs
LEISURE
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Source: D.K. Shifflet & Associates, prepared by VISIT FLORIDA
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When compared to national spend, visitors to Florida spend 18 percent more on average.

Florida compares per person per day spend with and without transportation costs included. Visitors from New York City spent the most, at $153 per person per day including transportation. Visitors from Atlanta spent the least, at $105 per person per day including transportation.

DMA Market Snapshot

DETROIT, MI
Detroit is a strong couples and families market. Florida’s Detroit visitors have an average household income of $112,000. Most visitors come in the winter and more than half are Boomers.

2013 VISITOR SPEND TOP ORIGIN DMAs

LEISURE
This chart shows the average expenditures per person per day in Florida from each DMA. For example, Florida visitors from New York City spent $153 per person per day. Excluding transportation the number is $105.

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DMA Market Snapshot

CHICAGO, IL
Chicago is a strong origin market for couples and singles. The top season to visit Florida is the fall. The majority of Florida visitors from Chicago are Boomers and a quarter are in the Affluent Family lifestage.

2013 VISITOR SPEND TOP ORIGIN DMAs
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DMA Market Snapshot

WASHINGTON, D.C.
D.C. is a strong couples and singles market. The majority of Florida visitors from D.C. are Boomers and in the Affluent Mature and Affluent Families. Although share declined in 2013, volume increased.

Click DMA for snapshot

2013 VISITOR SPEND TOP ORIGIN DMAs
LEISURE
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DMA Market Snapshot

DALLAS, TX

Dallas is a strong couples and families market. Dallas is a recent addition to Florida’s Super Eight markets, joining the group in 2012. Dallas is a strong air and drive market with visitors typically traveling during the summer.

2013 VISITOR SPEND TOP ORIGIN DMAs

LEISURE

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DMA Market Snapshot

ATLANTA, GA
Of all the markets in the Super Eight, Atlanta has the largest share of families visiting Florida. Atlanta’s share of visitors in 2013 also was the DMA’s biggest in five years. The top season is summer.

2013 VISITOR SPEND TOP ORIGIN DMAs
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SUPER EIGHT VISITOR VOLUME
For six of the eight top origin markets, the share of Florida-bound travelers has increased. Visitor share from New York has grown the most, while share from Philadelphia continues its decline. Three markets (New York, Atlanta and Boston) experienced their largest share of visitors in the past five years.

FIVE YEARS OF VISITOR SHARE
COMBINED BUSINESS AND LEISURE (2009-2013)
This table shows the variation in the share of Florida visitors from the Super Eight DMAS.

<table>
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<tr>
<th></th>
<th>2009</th>
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<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>PP* change '13/12</th>
<th>PP* change '13/09</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York, NY</td>
<td>9.4%</td>
<td>9.2%</td>
<td>9.7%</td>
<td>10.7%</td>
<td>11.7%</td>
<td>+1.0 pp</td>
<td>+2.3 pp</td>
</tr>
<tr>
<td>Atlanta, GA</td>
<td>7.2%</td>
<td>6.9%</td>
<td>6.8%</td>
<td>7.6%</td>
<td>8.1%</td>
<td>+0.5 pp</td>
<td>+0.9 pp</td>
</tr>
<tr>
<td>Chicago, IL</td>
<td>4.1%</td>
<td>4.7%</td>
<td>4.4%</td>
<td>4.3%</td>
<td>4.3%</td>
<td>0.0 pp</td>
<td>+0.2 pp</td>
</tr>
<tr>
<td>Boston, MA</td>
<td>2.8%</td>
<td>2.5%</td>
<td>2.8%</td>
<td>3.5%</td>
<td>4.1%</td>
<td>+0.6 pp</td>
<td>+1.3 pp</td>
</tr>
<tr>
<td>Washington, D.C.</td>
<td>2.9%</td>
<td>2.7%</td>
<td>2.9%</td>
<td>3.1%</td>
<td>3.0%</td>
<td>-0.1 pp</td>
<td>+0.1 pp</td>
</tr>
<tr>
<td>Philadelphia, PA</td>
<td>3.9%</td>
<td>3.6%</td>
<td>3.0%</td>
<td>2.6%</td>
<td>2.6%</td>
<td>0.0 pp</td>
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<td>Detroit, MI</td>
<td>1.9%</td>
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<td>-0.3 pp</td>
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<tr>
<td>Dallas-Fort Worth, TX</td>
<td>1.9%</td>
<td>2.3%</td>
<td>2.0%</td>
<td>1.8%</td>
<td>1.9%</td>
<td>+0.1 pp</td>
<td>0.0 pp</td>
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* percentage point
Source: D.K. Shifflet & Associates, prepared by VISIT FLORIDA
VOLUME BY TRANSPORTATION MODE

In 2014, Florida experienced a significant increase in the number of drive visitors — no surprise considering falling gas prices and rising airfares. 2014 drive visitors increased by 2.6 million to 46.9 million visitors. 2014 air visitors increased by 1.8 million.

Highlights

• In 2014, the largest amount of visitors by air came in Quarter 1.

• Auto or non-air visitors to Florida typically dominate in the summer months (Quarter 3).

• From 2013 to 2014, drive visitor volume increased in all four quarters, with Quarter 4 receiving 1 million more drive visitors than Quarter 4, 2013.

Source: VISIT FLORIDA
SPENDING BY TRANSPORTATION MODE

Spending by visitors is the highest it has been in six years. In 2013, air visitors spent 52 percent more per person per day than drive visitors.

While seasonal patterns differ for drive and air visitors, five-year trends show that spending by drive and air visitors is consistent year over year.

Highlights

- Average expenditures per person per day including transportation for **air visitors** was $194.20, up 3 percent from 2012.
- Average expenditures per person per day including transportation for **drive visitors** was $128.10, up 2 percent from 2012.
TRANSPORTATION - AIR
The majority of air visitors are predominately from the Northeast, with Texas and California as outlying contributors. The strongest destination for air visitors is the Central Florida region receiving more than 40 percent.

Highlights
• Florida’s fourth-largest air origin state is Texas.
• California experienced the largest decline in share of air visitors - from 7 percent in 2012 to 5.4 percent in 2013.
• Five international airports account for more than 82 percent of Florida’s domestic emplanements: Orlando, Miami, Fort Lauderdale, Tampa and Fort Myers.

Source: D.K. Shifflet & Associates
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DESTINATION REGIONS

1. Orlando International airport (MCO)
2. Miami International Airport (MIA)
3. Fort Lauderdale/Hollywood International Airport (FLL)
4. Tampa International Airport (TPA)
5. Fort Myers International Airport (RSW)

Source: D.K. Shifflet & Associates
TRANSPORTATION - DRIVE

Based on preliminary figures, 2 million more domestic visitors came to Florida by car in 2014 compared to 2013. Slightly more than 60 percent of Florida’s drive visitors come from markets east of the Mississippi. Florida’s drive visitors predominately travel to the Central and Northwest vacation regions.

Highlights

- Drive visitors typically have larger travel parties than air visitors – 2.3 people versus 1.9. Nearly one in four drive travel parties is a family.
- North Carolina ranked third for drive visitors to Florida in 2013, a significant increase from the year before.
- Two Florida regions (Northwest and Central) received almost 50 percent of Florida’s drive visitors.

Source: D.K. Shifflet & Associates
TRANSPORTATION - DRIVE

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DESTINATION REGIONS

This map shows the share of drive visitors to each of Florida’s regions. There are four primary feeder highways that connect top drive states to Florida.
VISITOR VOLUME BY LIFESTAGE SEGMENT

Florida’s 83 million-plus domestic visitors represent a diverse portfolio of generational cohorts, income levels, family composition and ethnicities. Florida tracks visitor volume, spend and other patterns by lifestage segmentation. Lifestage 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.

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 (35-54; $75K+; kids in HH)
- Moderate Mature (55 or older; <$99K; no kids)
- Affluent Mature (55 or older; $100K+; no kids)

Visitor Volume By:

LIFESTAGE SEGMENT COMPOSITION

This chart shows the share of domestic visitors to Florida by lifestage. 13 percent of Florida’s domestic visitors are in the Young & Free lifestage, which means they are ages 18-34 with no kids in the household.

Source: D.K. Shifflet & Associates
GENERATIONAL COMPOSITION

Florida’s visitors span the generations. While Boomers (born 1946-1964) and Generation X (born 1965-1980) traditionally have had the largest share of Florida visitors, Millennial visitation is on the rise, especially as Millennials become more independent and start their own families.

Definitions
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- Young Family (18-34; any income; kids in HH)
- Maturing & Free (35-54; any income; no kids)
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- Affluent Family (35-54; $75K+; kids in HH)
- Moderate Mature (55 or older; <$99K; no kids)
- Affluent Mature (55 or older; $100K+; no kids)
FAMILY / NON-FAMILY COMPOSITION

Florida is recognized globally as a family vacation destination and families comprise 39 percent of total domestic visitors.

Highlights

• Three lifestages include children at home: Young Family, Moderate Family and Affluent Family. These groups account for 39 percent of Florida’s visitors.

• Affluent Family, Moderate Mature and Affluent Mature lifestages all experienced growth in the past five years.

VISITOR VOLUME BY FAMILY COMPOSITION

This chart shows that in 2013, Non-Family Lifestages (those with no children in the household) made up 61 percent of Florida’s domestic visitors.

Source: D.K. Shifflet & Associates
VISITOR VOLUME BY AGE
Florida attracts visitors from across the age spectrum, creating a mix of interests and budgets to fuel Sunshine State tourism. The largest portion of domestic visitors comes from the 35-54 age group and the average age of the Florida visitor is 47. Florida underperforms with the 18-34 age group, which represents 29 percent of U.S. overnight travel but only 24 percent of Florida travelers.

Highlights
- Among a well-balanced mix of ages, 35 to 54-year-olds make up the greatest portion of Florida’s visitors.
- For both Florida and U.S. travelers, the 35-54 age group is the largest segment – 39 percent of U.S. overnight travel and 43 percent of Florida’s visitors.

This chart shows that in 2013, the Mature Lifestages (55 and older) accounted for a third of Florida’s domestic visitors.
VISITOR SPEND BY LIFESTAGE

In order to measure spending by different lifestages, the total trip value is considered, including party size and length of stay. No surprise, trip values are highest for the affluent travelers who have more discretionary income to spend and affluent families who have the discretionary spend and larger travel parties.

Trip Value: Definition

Trip Value is the average amount spent during a Florida visit. To arrive at the numbers in the bar chart, multiply the average expenditure per person per day by the average length of stay and average travel party size.

Here’s the calculation for the Affluent Family:

$164.70 \times 5.06 \text{ days} \times 2.9 \text{ persons} = \$2,417.$

FLORIDA TRIP VALUE BY LIFESTAGE

COMBINED BUSINESS AND LEISURE TRAVEL (2013)

This chart shows that in 2013, the Affluent Family lifestage had the greatest trip value compared to all other lifestages.
**DEMOGRAPHIChifts**

Historically, Florida’s visitors have been predominately Boomers and Gen-Xers, but in the past five years, the share of visitors from the Millennial generation has increased 10 percentage points – as younger demographics matured. In short, a growing share of this demographic has the means to travel. Gen-Xers are on the rebound after a slight decrease in 2012.

**VOLUME BY GENERATION OVER FIVE YEARS**

This table breaks out Florida’s visitors by generational cohort. Over the past five years, Millennial visitors to Florida have increased the most.

<table>
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<th>pp* change '13/12</th>
<th>pp* change '13/09</th>
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<tbody>
<tr>
<td>Millennials (1981 to present)</td>
<td>11%</td>
<td>15%</td>
<td>16%</td>
<td>21%</td>
<td>21%</td>
<td>0 pp</td>
<td>+10 pp</td>
</tr>
<tr>
<td>GenX (1965-1980)</td>
<td>40%</td>
<td>36%</td>
<td>36%</td>
<td>30%</td>
<td>34%</td>
<td>+4 pp</td>
<td>-6 pp</td>
</tr>
<tr>
<td>Boomers (1946-1964)</td>
<td>35%</td>
<td>35%</td>
<td>35%</td>
<td>39%</td>
<td>36%</td>
<td>-3 pp</td>
<td>+1 pp</td>
</tr>
<tr>
<td>Silent/GI (1945 or earlier)</td>
<td>14%</td>
<td>13%</td>
<td>13%</td>
<td>10%</td>
<td>9%</td>
<td>-1 pp</td>
<td>-5 pp</td>
</tr>
</tbody>
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* percentage point

Source: D.K. Shifflet & Associates
HOUSEHOLD INCOME
The average household income of Florida visitors reached a record high in 2013, with nearly a quarter of Florida visitors earning more than $150,000. Meanwhile, the share of Florida visitors making $149,000 and lower has generally declined since 2011.

Highlights
• In 2013, the average household income of domestic visitors to Florida was $110,100 – up 6 percent from 2012 and the highest income level recorded.

• 2013 saw a four-point increase in visitors whose household income was greater than $150,000.

• Those visitors with household incomes under $75,000 declined 6 percentage points from 2012 to 2013.

FIVE-YEAR TRENDS
This chart shows the share of Florida visitors by household income.

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<td>Under $49,999</td>
<td>24%</td>
<td>20%</td>
<td>26%</td>
<td>25%</td>
<td>22%</td>
<td>-3 pp</td>
<td>-2 pp</td>
</tr>
<tr>
<td>$50,000-$74,999</td>
<td>19%</td>
<td>18%</td>
<td>20%</td>
<td>19%</td>
<td>16%</td>
<td>-3 pp</td>
<td>-3 pp</td>
</tr>
<tr>
<td>$75,000-$99,999</td>
<td>16%</td>
<td>18%</td>
<td>16%</td>
<td>17%</td>
<td>17%</td>
<td>0 pp</td>
<td>+1 pp</td>
</tr>
<tr>
<td>$100,000-$149,999</td>
<td>28%</td>
<td>31%</td>
<td>25%</td>
<td>20%</td>
<td>22%</td>
<td>+2 pp</td>
<td>-6 pp</td>
</tr>
<tr>
<td>$150,000-$199,999</td>
<td>9%</td>
<td>7%</td>
<td>8%</td>
<td>12%</td>
<td>15%</td>
<td>+3 pp</td>
<td>+6 pp</td>
</tr>
<tr>
<td>$200,000+</td>
<td>5%</td>
<td>5%</td>
<td>5%</td>
<td>7%</td>
<td>8%</td>
<td>+1 pp</td>
<td>+3 pp</td>
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<tr>
<td>Average</td>
<td>$97,600</td>
<td>$101,300</td>
<td>$95,400</td>
<td>$103,400</td>
<td>$110,100</td>
<td>---</td>
<td>---</td>
</tr>
</tbody>
</table>

* percentage point
Source: D.K. Shifflet & Associates
PRIMARY REASON FOR TRAVEL
89 percent of Florida’s domestic visitors come for leisure. Within that 89 percent, the top two reasons people travel to Florida are: a vacation (38%); or to visit friends and relatives (VFR) who live in the Sunshine State (26%). Business travelers contribute 11 percent of the visitor mix.

VISITOR TRIP PURPOSE
Visitors who came to Florida for the purpose of a vacation made up 38 percent of Florida’s domestic visitors.

- General Vacation: 38%
- Visit Friends / Relatives: 26%
- Special Event: 8%
- Getaway Weekend: 10%
- Other Leisure/Personal: 7%
- Business: 11%

Source: D.K. Shifflet and Associates
VISITOR PROFILE BASED ON TRIP PURPOSE

Visitors to Florida come for a variety of reasons, and spending patterns vary based on the reason for travel. Business visitors tend to spend the most ($260 per day) but take shorter trips. Visitors seeing friends and family spend the least per day, but more of their dollars go to food, entertainment and shopping experiences, making this visitor important to Florida restaurants, merchants and attractions. General leisure travelers spend $145 per day (up 4% from 2012).

LEISURE, VFR AND BUSINESS SPEND

<table>
<thead>
<tr>
<th>Percentage of Total Domestic Visitation</th>
<th>Leisure</th>
<th>VFR*</th>
<th>Business</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic Visitation</td>
<td>89%</td>
<td>26%**</td>
<td>11%</td>
</tr>
<tr>
<td>Per-Day Spend</td>
<td>$145</td>
<td>$97*</td>
<td>$260</td>
</tr>
<tr>
<td>Avg Length of Stay</td>
<td>4.5 nights</td>
<td>4.3 nights</td>
<td>3.1 nights</td>
</tr>
<tr>
<td>Paid Accommodations</td>
<td>60%</td>
<td>21%</td>
<td>84%</td>
</tr>
<tr>
<td>Avg Party Size</td>
<td>2.3</td>
<td>1.9</td>
<td>1.4</td>
</tr>
<tr>
<td>Leading Season</td>
<td>Summer (30%)</td>
<td>Winter (29%)</td>
<td>Fall (29%)</td>
</tr>
<tr>
<td>Origin States</td>
<td>Georgia (10%), New York (9%), Ohio (5%)</td>
<td>New York (12%), Georgia (10%), Pennsylvania (5%)</td>
<td>Georgia (13%), New York (11%), Texas (9%)</td>
</tr>
<tr>
<td>Trip Value</td>
<td>$1,751</td>
<td>$931</td>
<td>$1,401</td>
</tr>
</tbody>
</table>

*VFR (visit friends and relatives) visitors typically inspire increased entertainment and travel spending by their resident hosts – spending that is not reflected in the average per-day spend.
**VFR percentage is also included within the 89 percent leisure.
COMPETITIVE LANDSCAPE

Florida is one of the world’s leading destinations, serving more than 98 million visitors a year who come from outside the Sunshine State. Eighty-four percent of Florida’s visitors travel from locations within the domestic U.S. Florida’s ability to inspire American desire to visit is a leading indicator of success and a strong competitive benchmark.
FLORIDA’S ABILITY TO INSPIRE TRAVEL

Interest in travelling to Florida within the next two years is strongest among Gen-Xers, Boomers and Matures. Interest was less from Millennials, which may indicate a need for a new Florida approach to that audience. Millennials showed higher interest in visiting New York and Colorado, more so than the other generations.

**TOP U.S. DESTINATIONS BY GENERATION**

Source: 2014 Portrait of American Travelers, MMGY Global/Harrison Group. Respondents could select more than one state. The states shown garnered the most responses.
INSIGHTS AND OPPORTUNITIES

Florida’s momentum of four record years is excellent. But the scale Florida has now achieved also creates some challenges for sustainability.

CHANGING DEMOGRAPHICS
Loyal, affluent and mature visitors have been a foundation of Florida tourism for some time. Recently there has been a noticeable increase in more affluent visitors. Given that average household income of the Florida visitor is increasing, the tourism industry needs to ensure that its product attracts and serves the expectations of the affluent group. There may be implications for product investment in addition to market investment.
LIMITED TIME OFF
Americans are taking less vacation time now than at any point in the past four decades and this trend doesn’t seem to be reversing anytime soon. Vacation days are not the only thing left on the desk; hundreds of billions of dollars in economic impact are being surrendered with the remaining time off. Given that Florida has more to offer travelers and merits a longer stay, Florida’s challenge will be communicating with potential visitors who already think they know us.

INSIGHTS
AND OPPORTUNITIES
Florida’s momentum of four record years is excellent. But the scale Florida has now achieved also creates some challenges for sustainability.
INVESTMENT
As Florida’s visitor volume has grown, its’ geographic footprint expanded to increase the number of productive origin markets. Marketing to more markets requires increased investment. At the same time, Florida’s changing visitor demographics suggest an opportunity to drive yield. As it faces future opportunities, Florida will need to carefully weigh the costs and benefits of increasing yield and volume.

INSIGHTS
AND OPPORTUNITIES
Florida’s momentum of four record years is excellent. But the scale Florida has now achieved also creates some challenges for sustainability.
After years of steady increases, the getaway weekend is no longer a trend but a staple of Florida tourism, accounting for one in 10 domestic trips to the state. Florida will need to determine both what attracts and satisfies these “in and out” visitors. Equally important: the opportunity to engage them as repeat visitors.

Florida’s momentum of four record years is excellent. But the scale Florida has now achieved also creates some challenges for sustainability.
In the face of increasing competition for consumer attention, Florida must improve its ability to provide the most relevant information, events and deals to consumers in advance of and during their trips in the Sunshine State. The more consumers interact with Florida’s content, the more Florida has an opportunity to influence their decisions. Content development and distribution remain critical.

Florida’s momentum of four record years is excellent. But the scale Florida has now achieved also creates some challenges for sustainability.
BEYOND THE GATEWAYS
As Florida’s visitor numbers increase, it becomes especially important to distribute visitors throughout the state in order to protect the quality of their experience.

INSIGHTS AND OPPORTUNITIES
Florida’s momentum of four record years is excellent. But the scale Florida has now achieved also creates some challenges for sustainability.
**IMPORTANCE OF THE IN-STATE MARKET**

Florida’s residents offer two valuable opportunities for tourism: They travel in-state as tourists themselves and they influence travel to the state, especially visits by friends and relatives. When travel to visit Florida friends and relatives (VFR) is combined with the number of Floridians vacationing within the state themselves, Florida residents are critical to 41.8 million pleasure trips a year. This volume helps the tourism industry sustain year-round business.

2014 was a repeat record year for VFR travel. With 20.2 million in-state trips in 2014, travel by Florida residents was the highest it has been since 2012.
Floridians spent an estimated $7.1 billion vacationing within the state in 2013. Total spend was higher in 2013 than it was in 2012 ($6.9 billion) even though per person per day spend decreased slightly.

The downward shift in resident per day spend was likely a result of less affluent Florida households traveling in 2013 compared to 2012. Average household income for in-state leisure travel dropped from $82,500 to $78,000.

While domestic visitors spend the biggest portion of travel dollars on transportation, resident travelers in-state spend a large portion of their travel dollars on food, accommodation and shopping, making them especially important for Florida lodgings, restaurants and retailers.
FLORIDIAN PLEASURE TRIP TRENDS
In-state travel by Floridians also has grown to historic levels. In 2014, 57 percent took in-state pleasure trips, up 12pp from 2013. As residents increased their in-state travel, they took fewer vacations out-of-state hitting a 10-year low.

Highlights
• Historically, resident travel has remained relatively even across seasons. However in 2014 there was a spike during the summer with 7.9 million trips compared to around 4 million for each of the other 3 quarters.
• The 2011 record for in-state travel may have resulted from limited vacation budgets and close to home savings. According to the Census Bureau, median household income for Floridians was the lowest it had been for 5 years.
• In 2013, the five-year average household income for all residents that traveled decreased slightly across the board. Five-year average household incomes for Floridians traveling in-state went from $80,600 to $79,140 and dropped from $87,500 to $86,860 for residents who traveled out-of-state.

LEISURE TRIP PATTERNS OF FLORIDANS
IN THOUSANDS OF PERSON-TRIPS
This chart shows the number of pleasure trips Floridians took in-state and out-of-state across 10 years. For example, between 2012 and 2013, total pleasure travel by Floridians – in-state and out-of-state – decreased. 2011 was the highest year of in-state travel, followed by 2012 and 2014.

VISIT FLORIDA approaches in-state audiences in three ways: as promoters of Florida’s tourism assets; as hosts to visiting friends and relatives (VFR); and as resident travelers. Instead of in-state, destination-specific marketing – which Florida tourism Partners already successfully execute – VISIT FLORIDA promotes an advocacy platform called Share a Little Sunshine, which creates opportunities for Florida fans to influence potential travelers to the state.

As an additional benefit, research has shown a correlation between resident knowledge about the importance of tourism and resident travel within the state. Other research has demonstrated the power of social networks and peer recommendations in influencing travel – especially in a digital era. Combining these findings, Florida’s advocacy platform focuses on awareness and engagement to influence travel to and within the state.
PROMOTER

When it comes to promoting the state’s tourism assets and influencing potential travelers, Floridians have a natural advantage: They live here. Historically, and especially in the digital era, visitors look to personal recommendations and local insights to inform their travel planning. Florida residents are a valuable and trusted source of knowledge for potential visitors.

Highlights

• About half of the people who travel consider information from family and friends the most important source when selecting a vacation destination.

• Online reviews and personal recommendations are considered the world’s most trusted source of information. According to a 2013 Nielsen study on advertising, 84 percent of consumers around the world trust and take action on recommendations from people they know. Online consumer reviews, at 68 percent, are the second-most trusted source of brand information and messaging.

SOURCES CONSIDERED WHEN SELECTING A DESTINATION

<table>
<thead>
<tr>
<th>Source</th>
<th>Millennials %</th>
<th>Xers %</th>
<th>Boomers %</th>
<th>Matures %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friends/Family</td>
<td>48</td>
<td>50</td>
<td>51</td>
<td>48</td>
</tr>
<tr>
<td>Printed visitor guides</td>
<td>38(^a)</td>
<td>32</td>
<td>41(^a)</td>
<td>38</td>
</tr>
<tr>
<td>Destination websites</td>
<td>34</td>
<td>31</td>
<td>36</td>
<td>31</td>
</tr>
<tr>
<td>Professional travel guide books</td>
<td>31(^a)</td>
<td>21</td>
<td>32(^a)</td>
<td>36(^a)</td>
</tr>
<tr>
<td>Travel review websites</td>
<td>29(^b)</td>
<td>28(^b)</td>
<td>26</td>
<td>20</td>
</tr>
</tbody>
</table>

Source: MMGY Global; 2014 Portrait of American Travelers

\(a\) Significantly different from Xer travelers

\(b\) Significantly different from Mature travelers
HOST
Visitors have many reasons to travel to Florida for leisure: vacations, special events, visiting friends and family (VFR). VFR has always been an important visitor source for Florida—accounting for more than one-quarter of Florida’s domestic visitors. According to a Florida resident survey conducted by VISIT FLORIDA, approximately 38 percent of Floridians invited friends and relatives to visit in 2014.

Highlights
- VFR travel is on the rise. As a national trend, the primary trip purpose of visiting friends and family has gone from 49 percent to 51 percent over the past three years.
- Nearly 4 out of 10 Floridians invited out-of-state friends and relatives to visit this past year. Of those invited, 80 percent actually came.
- Florida residents aware of Share a Little Sunshine were slightly more likely (47%) to invite VFR travelers than those unaware (36%).

Source: VISIT FLORIDA; Phocuswright Destination Unknown Study

THE POWER OF A PERSONAL INVITATION
Of Floridians surveyed who invited friends/relatives to visit – this chart shows how many people subsequently traveled to Florida based on an invitation.

Source: Data based on phone survey by American Direction Group
IN-STATE TRAVELER
Florida resident travel helps sustain year-round tourism, especially during summer months. Over the past 10 years, Florida has experienced consistent growth in resident in-state travel. Floridians travel almost exclusively by car and are especially important to natural and rural destinations across the state.

Highlights
- More than 20 million in-state pleasure trips were taken by Florida residents in 2014.
- Residents who travel in-state generally take quick getaway trips of one or two nights.
- In-state travelers are typically couples (45%) and single adult travelers (21%).
- Florida residents who travel in-state are younger on average than residents that travel out of state, 53 percent of in-state travelers are GenX (29%) and Millennials (24%).

TOP TEN DESTINATIONS FOR RESIDENT TRAVELERS

1. Orlando Area
2. Tampa Area / St. Petersburg Area
3. Not an MSA (Metropolitan Statistical Area)
4. Jacksonville / St. Augustine Area
5. Daytona Beach Area
6. Fort Lauderdale Area
7. Miami Area
8. Melbourne / Cocoa Beach Area
9. Ft. Myers Area / Cape Coral
10. Tallahassee Area

Source: D.K. Shifflet & Associates
AWARENESS
Floridian attitudes about tourism suggest a correlation between awareness about the economic impact of tourism for Florida and in-state resident travel. In fact, residents aware of Share a Little Sunshine are 12 percent more likely to take a trip in-state. There is an opportunity to sustain in-state travel by maintaining awareness among Floridians about the beneficial impact of tourism.

INSIGHTS AND OPPORTUNITIES
Converting Florida fans (both resident and visitors) into Florida advocates will be a critical component of Florida’s future marketing efforts. Five insights form the foundation of the 2015-16 advocacy program focused on engaging Florida travel fans.
INSIGHTS AND OPPORTUNITIES

Converting Florida fans (both resident and visitors) into Florida advocates will be a critical component of Florida’s future marketing efforts. Five insights form the foundation of the 2015-16 advocacy program focused on engaging Florida travel fans.
Traveler confidence in personal recommendations continues to rise. Travelers find a friend’s or relative’s endorsement more trustworthy than any other source of travel information. Success achieved through VISIT FLORIDA’s advocacy program suggests the need for a continued commitment to fan engagement in order for Florida to remain top of mind year-round. With conversations and recommendations occurring on a variety of platforms, it is important for Florida to be platform agnostic.

INSIGHTS AND OPPORTUNITIES

Converting Florida fans (both resident and visitors) into Florida advocates will be a critical component of Florida’s future marketing efforts. Five insights form the foundation of the 2015-16 advocacy program focused on engaging Florida travel fans.
Several years of success with the resident invitation program have confirmed a quantifiable impact on VFR travel to the state. Additional opportunities may exist in an expansion of the program beyond Florida residents to non-resident fans.

CONVERTING FLORIDA FANS (BOTH RESIDENT AND VISITORS) INTO FLORIDA ADVOCATES WILL BE A CRITICAL COMPONENT OF FLORIDA’S FUTURE MARKETING EFFORTS. FIVE INSIGHTS FORM THE FOUNDATION OF THE 2015-16 ADVOCACY PROGRAM FOCUSED ON ENGAGING FLORIDA TRAVEL FANS.
COSTS
As occupancy increases and ADR rises, the cost to Floridians to vacation near to home will also rise. Florida’s DMOs that specifically market to residents will need to adjust their efforts to focus on the vacation attributes, not just the value proposition.

INSIGHTS AND OPPORTUNITIES
Converting Florida fans (both resident and visitors) into Florida advocates will be a critical component of Florida’s future marketing efforts. Five insights form the foundation of the 2015-16 advocacy program focused on engaging Florida travel fans.
INTERNATIONAL VISITOR VOLUME
COMBINED BUSINESS AND LEISURE TRAVEL
Note: The 2014 overseas estimates are finalized in August and the 2014 final Canadian estimates are received from Statistics Canada in September. Therefore, preliminary numbers are used for this report.
Source: VISIT FLORIDA

International visitors play an increasingly important role for Florida tourism, fueling growth in top gateways and contributing to total tourism spend.

In 2014, Florida observed another year of record highs. As a share of total volume, Canada remained Florida’s strongest source of international visitors, contributing 4 percent of Florida’s total volume. Overseas visitors delivered 12 percent of total volume. International visitors to Florida originate from 188 countries, more than half of which (54%) come from five global markets: Canada, Brazil, the United Kingdom, Germany and Mexico.
INTERNATIONAL VISITOR SPEND
COMBINED BUSINESS AND LEISURE TRAVEL
Note: The 2014 overseas estimates are finalized in August and the 2014 final Canadian estimates are received from Statistics Canada in September. Therefore, preliminary numbers are used for this report.
Source: VISIT FLORIDA

Florida’s overseas and Canadian visitors spent more than $16.7 billion in 2014 – down 6.5 percent year over year. Florida’s Foundation Five global markets accounted for nearly 56 percent of total international spending. Altogether, visitors from Canada, the U.K., Germany, Brazil and Mexico poured $9.4 billion into Florida’s economy in 2014.
VISITOR VOLUME TRENDS
The Sunshine State has experienced significant growth in the number of visitors from overseas and Canada over the past five years. During this period, increased international outbound travel and favorable exchange rates fueled a 61 percent increase in both Canadian and overseas visitors.

Canada has shown a steady increase in visitation to Florida. Among overseas origin markets, South America and Europe have been the greatest contributors to visitation during the past five years.
VISITOR SPENDING TRENDS

Spending in Florida by overseas and Canadian visitors is showing signs of slowing. After several years of hovering around par with the U.S. dollar, the Canadian dollar began declining in 2013 and in the subsequent year Canadian spending per person declined. The U.S. dollar held onto its value longer against other international currencies, but economic and political circumstances in some of Florida’s top spending South American countries contributed to a decline in visitor spending.

FIVE YEARS OF VISITOR SPENDING

This bar graph shows spending in Florida by visitors from Canada and overseas. In 2009, Florida’s international visitors poured $7.8 billion into the Florida economy; five years later, international visitors contributed $16.7 billion* to Florida’s economy.

Highlights

• Five-year growth in Canadian spend: up 91 percent*

• Five-year growth in overseas card spend: up 29 percent*

* Figures based on preliminary estimates. Note: To capture 5-year growth, 2009 estimates (not shown) are used.

Note: Overseas spending estimates are based on face-to-face card transactions and cash withdrawn in Florida, not transactions made overseas or online. Source: 2010-2014 overseas estimates are extrapolated from aggregate credit card data provided by VisaVue Travel and incorporate data from other independent sources. 2010-2013 Canadian estimates provided by Statistics Canada. 2014 Canadian estimate derived by VISIT FLORIDA based on historical analysis of data from Statistics Canada.
IMPACT OF CURRENCY FLUCTUATION

Exchange rates can influence where visitors choose to go and how much they spend. In 2014, Canada’s currency lost value against the U.S. dollar and is projected to lose further value in 2015. The British pound and euro also are projected to lose value in 2015. This could reduce visitor spend from these countries or even depress visitation. In Brazil, the real has weakened, which may slow travel among the rising middle class, but is likely to have less impact on more affluent households.

CURRENCY EXCHANGE RATES PER U.S. DOLLAR

This chart shows what is costs to purchase one U.S. dollar in the local currency since 2010.

Source: Organization for Economic Co-operation and Development (OECD)
FOUNDATION FIVE MARKETS

Canada
Germany
United Kingdom
Brazil
Mexico

INDIA, CHINA, AUSTRALIA MARKETS

India
China
Australia

APPROACH

VISIT FLORIDA approaches its international consumer markets based on their potential to deliver visitor volume in the near and longer time frame. For near-term volume, five markets rise to the top: Canada, Brazil, the U.K., Germany and Mexico. These markets contribute more than half of the state’s 15.7 million international visitors.

Focusing on visitor growth over a longer time frame, three global markets rise to the top: India, China and Australia. In these countries, consumer awareness of Florida is low, but a rapidly growing middle class, outbound travel, and changes in global air travel make the outlook promising in future years.
OVERVIEW: FOUNDATION FIVE MARKETS

Canada, Brazil, the United Kingdom, Germany and Mexico have a long and steady track record visiting Florida. The Florida product has been visible to consumers through advertising, representation, and promotion by in-country airlines and tour operators. Florida typically has excellent industry partnerships in-country, further increasing Florida awareness, engagement and conversion with these consumers.

In Latin America, weakening local economies combined with a strengthening dollar have created downward pressure on spending by visitors. Canadian visitors also spent less than the previous year, though it is important to note the previous year’s consumer spending was exceptionally high. Visitors from the U.K. and Germany spent significantly more while on vacation in 2014 thanks to positive local conditions.

**Highlights: Volume**
- Canada is Florida’s top market for international visitors.
- Visitation from Brazil, Florida’s No. 2 international market, has increased 156 percent* since 2009.
- U.K. visitation to Florida has decreased slightly (-1%)* since 2009, while German visitation has increased 66 percent*.
- Mexican visitation has grown 57 percent* during the past five years.

*Figure is based on preliminary estimate. Note: To capture 5-year growth, 2009 estimates (not shown) are used.

<table>
<thead>
<tr>
<th>Country</th>
<th>2013 Volume</th>
<th>2014* Volume</th>
<th>2014/'13 % Change*</th>
<th>% of Foundation Markets*</th>
<th>% of Total International*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foundation Five Markets</td>
<td>8,343,000</td>
<td>8,473,000</td>
<td>1.6%</td>
<td>100.0%</td>
<td>53.9%</td>
</tr>
<tr>
<td>Canada</td>
<td>4,172,000</td>
<td>4,247,000</td>
<td>1.8%</td>
<td>50.1%</td>
<td>27.0%</td>
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<tr>
<td>Brazil</td>
<td>1,819,000</td>
<td>1,748,000</td>
<td>-3.9%</td>
<td>20.6%</td>
<td>11.1%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>1,516,000</td>
<td>1,605,000</td>
<td>5.9%</td>
<td>18.9%</td>
<td>10.2%</td>
</tr>
<tr>
<td>Germany</td>
<td>423,000</td>
<td>446,000</td>
<td>5.4%</td>
<td>5.3%</td>
<td>2.8%</td>
</tr>
<tr>
<td>Mexico</td>
<td>413,000</td>
<td>426,000</td>
<td>3.2%</td>
<td>5.0%</td>
<td>2.7%</td>
</tr>
</tbody>
</table>

* Estimate is preliminary and subject to change.
Source: Overseas estimates are extrapolated from aggregate card data provided by Visa Vue® Travel and incorporate data from other research sources. 2013 Canadian estimate provided by Statistics Canada. 2014 Canadian estimate reflects preliminary data provided by Statistics Canada and preliminary VISIT FLORIDA estimate derived using historical data obtained from Statistics Canada and other research sources.
OVERVIEW: FOUNDATION FIVE MARKETS

Canada, Brazil, the United Kingdom, Germany and Mexico have a long and steady track record visiting Florida. The Florida product has been visible to consumers through advertising, representation, and promotion by in-country airlines and tour operators. Florida typically has excellent industry partnerships in-country, further increasing Florida awareness, engagement and conversion with these consumers.

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<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>2013 Spend</th>
<th>2014* Spend</th>
<th>2014*/13 % Change*</th>
<th>% of Foundation Markets*</th>
<th>% of Total International*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foundation Five Markets</td>
<td>$10,015,000,000</td>
<td>$9,360,000,000</td>
<td>-6.5%</td>
<td>100.0%</td>
<td>55.9%</td>
</tr>
<tr>
<td>Canada</td>
<td>$5,493,000,000</td>
<td>$5,071,000,000</td>
<td>-7.7%</td>
<td>54.2%</td>
<td>30.3%</td>
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<tr>
<td>Brazil</td>
<td>$2,708,000,000</td>
<td>$2,244,000,000</td>
<td>-17.1%</td>
<td>24.0%</td>
<td>13.4%</td>
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<tr>
<td>United Kingdom</td>
<td>$1,135,000,000</td>
<td>$1,356,000,000</td>
<td>19.5%</td>
<td>14.5%</td>
<td>8.1%</td>
</tr>
<tr>
<td>Germany</td>
<td>$283,000,000</td>
<td>$312,000,000</td>
<td>10.3%</td>
<td>3.3%</td>
<td>1.9%</td>
</tr>
<tr>
<td>Mexico</td>
<td>$395,000,000</td>
<td>$376,000,000</td>
<td>-4.9%</td>
<td>4.0%</td>
<td>2.2%</td>
</tr>
</tbody>
</table>

* estimate is preliminary and subject to change.
Note: Overseas spending estimates are based on face-to-face card transactions and cash withdrawn in Florida, not transactions made overseas or online. Source: Overseas estimates are extrapolated from aggregate credit card data provided by VisaVue Travel and incorporate data from other research sources. 2013 Canadian estimate provided by Statistics Canada. 2014 Canadian estimate derived by VISIT FLORIDA based on historical data obtained from Statistics Canada and other research sources.
CANADA
Canada accounts for 27 percent of Florida’s international visitors and visits to Florida have risen in nine of the past 10 years.

Florida’s strong brand identity in Canada, plus growth in Canada’s aging population and excellent access to Florida from Canadian cities or U.S. border cities, will support continued growth in visits to Florida during the next five years.

In 2014, as the U.S. dollar began strengthening, Canadian visitors began cutting back on their in-market spend. Visitors continued to come but spent less.

### Highlights: Canada
- Florida is Canada’s No. 1 outbound travel destination when measured in visit nights and dollars spent.
- Most Canadian travelers visit Florida during the first quarter (40%).
- The top origin province for Canadian visitors to Florida is Ontario, followed by Quebec and Alberta.

![Canada Volume Bar Graph](image)

*This bar graph shows consistent growth during the past five years in Canadian visitation to Florida.*

- **2010:** 3.10M
- **2011:** 3.32M
- **2012:** 3.56M
- **2013:** 4.17M
- **2014:** 4.25M

* * estimate is preliminary and subject to change.*

Source: 2010-2013 estimates provided by Statistics Canada. 2014 Canadian estimate reflects preliminary data provided by Statistics Canada and preliminary VISIT FLORIDA estimates derived using historical data obtained from Statistics Canada and other research sources.
CANADA
Canada accounted for 30 percent of international spending in the state during 2014. While in Florida, Canadians spend an average of nearly $1,200 per visitor.

Florida’s strong brand identity in Canada, plus growth in Canada’s aging population and excellent access to Florida from Canadian cities or U.S. border cities, will support continued growth in visits to Florida during the next five years.

In 2014, as the U.S. dollar began strengthening, Canadian visitors began cutting back on their in-market spend. Visitors continued to come but spent less.

Highlights: Canada
- Florida is Canada’s No. 1 outbound travel destination when measured in visit nights and dollars spent.
- Most Canadian travelers visit Florida during the first quarter (40%).
- The top origin province for Canadian visitors to Florida is Ontario, followed by Quebec and Alberta.
BRAZIL

Brazil accounted for 14 percent of Florida’s international visitors in 2014, making it the No. 2 country for visitation here.

In recent years, Brazilian outbound travel has largely followed trends in Brazil’s GDP growth. With lower GDP growth projected over the next few years, Brazilian outbound travel is also projected to grow at a slower rate.

Even so, Florida’s dominant market share and strength among highly affluent households will help mitigate slowing growth. However, Florida is already seeing a decline in visitor spending and that may continue.

**BRAZIL VOLUME**

This bar graph shows five years of Brazilian visitation to Florida. 2014 numbers retreated slightly from the previous year.

- Brazil: 2010 - 1.02M, 2011 - 1.44M, 2012 - 1.74M, 2013 - 1.82M, 2014* - 1.75M

---

**Highlights: Brazil**

- Brazilians who visited Florida typically decided to travel 3.5 months before departure.
- Brazilian visitors’ top information sources for trip planning were an airline (55%), personal recommendations (51%), and a national/state/city travel office (31%).
- Florida’s Brazilian visitors primarily traveled to the state’s Southeast region (61%) and the Central-Central East region (58%).
BRAZIL

Brazil accounted for 13 percent of international visitor spending in the state during 2014.

In recent years, Brazilian outbound travel has largely followed trends in Brazil’s GDP growth. With lower GDP growth projected over the next few years, Brazilian outbound travel is also projected to grow at a slower rate.

Even so, Florida’s dominant market share and strength among highly affluent households will help mitigate slowing growth. However, Florida is already seeing a decline in visitor spending and that may continue.

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**Canada**

**Brazil**

**United Kingdom**

**Germany**

**Mexico**

**BRAZIL SPEND**

This bar graph shows five years of spending by Brazilians while visiting the state. 2014 numbers retreated from the previous year.

* estimate is preliminary and subject to change

Note: Overseas spending estimates are based on face-to-face card transactions and cash withdrawn in Florida, not transactions made overseas or online.

Source: Overseas estimates are extrapolated from aggregate credit card data provided by VisaVue Travel and incorporate data from other independent research sources.
UNITED KINGDOM
The U.K. accounted for 10 percent of the international visitors that Florida received in 2014.

The U.K. economy is forecast to be one of the strongest in Europe through 2016. Wages in the U.K. are projected to increase at a faster rate than consumer prices, providing U.K. consumers with more discretionary income to spend on travel.

Florida is a well-known destination among U.K. travelers and benefits from direct flights to multiple Florida destinations. These factors have provided Florida with historically high U.K. visitor volume and make it an important international market.

Highlights: United Kingdom
- For the past three years, the U.S. share of British long-haul travel was fairly stagnant. At the same time, British long-haul travel to closer warm-weather destinations steadily grew, such as the U.A.E.
- U.K. visitors travel in small groups and tend to take multigenerational holidays.
- U.K. visitors’ top information sources for trip planning are airlines (56%) and OTAs (32%).

UNITED KINGDOM VOLUME
This bar graph shows five years of U.K. visitation to Florida – which declined following the recession, but 2013 saw the start of a rebound.

* estimate is preliminary and subject to change
Source: Overseas estimates are extrapolated from aggregate credit card data provided by VisaVue Travel and incorporate data from other independent research sources.
UNITED KINGDOM
The U.K. accounted for 8 percent of international spending in the state during 2014.

The U.K. economy is forecast to be one of the strongest in Europe through 2016. Wages in the U.K. are projected to increase at a faster rate than consumer prices, providing U.K. consumers with more discretionary income to spend on travel.

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- U.K. visitors’ top information sources for trip planning are airlines (56%) and OTAs (32%).
GERMANY

German visitors accounted for 3 percent of Florida’s international visitors in 2014.

The German economy is forecast to grow at a slower rate during the next two years. However, economic growth in some cities is projected to exceed the national level. Nevertheless, German outbound travel tends to be stable during periods of slower economic growth and even during a recession, since Germans view travel as more of a right than a privilege.

Florida is one of the most popular U.S. destinations for German travelers. This popularity and the stability of German long-haul travel have driven historical growth in visitation to the state. Spending has also increased 47 percent during the last four years.

Highlights: Germany

- The top information sources for trip planning used by Florida’s German visitors are airlines (47%) and OTAs (40%).
- Roughly one-fifth of Florida’s German visitors used information from a travel agency office for trip planning.
- German travelers still turn to offline sources for trip planning, particularly travel guides. Travel guides are used by 20 percent of Florida’s German visitors.

GERMANY VOLUME

This bar graph shows that German visitation to Florida has experienced steady growth since 2010.

<table>
<thead>
<tr>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014*</th>
</tr>
</thead>
<tbody>
<tr>
<td>310,000</td>
<td>323,000</td>
<td>376,000</td>
<td>423,000</td>
<td>446,000</td>
</tr>
</tbody>
</table>

* estimate is preliminary and subject to change

Source: Overseas estimates are extrapolated from aggregate credit card data provided by VisaVue Travel and incorporate data from other independent research sources.
GERMANY

German visitors accounted for 2 percent of international spending in Florida during 2014.

The German economy is forecast to grow at a slower rate during the next two years. However, economic growth in some cities is projected to exceed the national level. Nevertheless, German outbound travel tends to be stable during periods of slower economic growth and even during a recession, since Germans view travel as more of a right than a privilege.

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GERMANY SPEND

This bar graph shows that German spending has experienced steady growth since 2010.

<table>
<thead>
<tr>
<th>Year</th>
<th>Volume</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010</td>
<td>$213M</td>
</tr>
<tr>
<td>2011</td>
<td>$244M</td>
</tr>
<tr>
<td>2012</td>
<td>$257M</td>
</tr>
<tr>
<td>2013</td>
<td>$283M</td>
</tr>
<tr>
<td>2014</td>
<td>$312M</td>
</tr>
</tbody>
</table>

* estimate is preliminary and subject to change

Note: Overseas spending estimates are based on face-to-face card transactions and cash withdrawn in Florida, not transactions made overseas or online.

Source: Overseas estimates are extrapolated from aggregate credit card data provided by VisaVue Travel and incorporate data from other independent research sources.
MEXICO

Mexican travelers represented 3 percent of Florida’s international visitors in 2014.

Even though the peso has depreciated against the U.S. dollar since 2001, Mexican arrivals to the U.S. have increased and are projected to continue increasing through 2019.

For Florida, growth will come from affluent households who travel by air. Excellent lift into Florida, combined with positive GDP projections and proximity, provide a strong growth opportunity for Florida.

MEXICO VOLUME

This bar graph shows that Mexican visitation to Florida has grown steadily since 2010.

Highlights: Mexico

- Nearly one in six Mexican air travelers visiting the U.S. report using a national/state/city travel office to obtain information for trip planning.
- The top information sources for trip planning used by Mexican air travelers to Florida were airlines (41%), OTAs (22%) and a travel agency office (20%).
- Florida’s Mexican visitors primarily traveled to the state’s Southeast region (62%) and the Central-Central East region (41%).
MEXICO

Mexican travelers represented 2 percent of international spending in Florida during 2014.

Even though the peso has depreciated against the U.S. dollar since 2001, Mexican arrivals to the U.S. have increased and are projected to continue increasing through 2019.

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Highlights: Mexico

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- The top information sources for trip planning used by Mexican air travelers to Florida were airlines (41%), OTAs (22%) and a travel agency office (20%).
- Florida’s Mexican visitors primarily traveled to the state’s Southeast region (62%) and the Central-Central East region (41%).
OVERVIEW: INDIA, CHINA, AUSTRALIA MARKETS

Florida has three international markets that offer significant potential as future origin markets and will require longer-term development. Consumers in India, China, and Australia are less aware of Florida, but in recent years visitation has shown positive growth.

By 2019, the top overseas inbound market for the United States will be China. The Chinese middle class is roughly the size of the U.S. population – and still growing. India has a huge population base with a growing middle class, many of which speak English. Australia’s travel class is already showing an affinity for the United States.

Highlights: Volume

- The U.S. is expected to be the No. 1 outbound market for Australian travelers in 2014. Australian arrivals to the U.S. are forecast to grow at an average rate of 4 percent through 2018.
- Chinese visitation to the U.S. is projected to grow to 4.9 million in 2019, making China the U.S.’s top overseas inbound travel market in only five years.
- Indian visitation to the U.S. is forecast to increase by an average of 7 percent during the next five years and reach 1.3 million in 2019.

INDIA, CHINA, AUSTRALIA MARKETS VOLUME

This table shows the volume of the ICA countries for the most recent year with year-over-year change and compares the volume contribution of the different countries to Florida’s total international visitor volume numbers.

<table>
<thead>
<tr>
<th>ICA Markets</th>
<th>2013 Volume</th>
<th>2014* Volume</th>
<th>% Change*</th>
<th>% of ICA Markets*</th>
<th>% of Total International*</th>
</tr>
</thead>
<tbody>
<tr>
<td>ICA Markets</td>
<td>629,000</td>
<td>636,000</td>
<td>1.2%</td>
<td>100.0%</td>
<td>4.0%</td>
</tr>
<tr>
<td>India</td>
<td>46,000</td>
<td>50,000</td>
<td>7.8%</td>
<td>7.8%</td>
<td>0.3%</td>
</tr>
<tr>
<td>China</td>
<td>266,000</td>
<td>267,000</td>
<td>0.4%</td>
<td>42.0%</td>
<td>1.7%</td>
</tr>
<tr>
<td>Australia</td>
<td>317,000</td>
<td>319,000</td>
<td>0.8%</td>
<td>50.2%</td>
<td>2.0%</td>
</tr>
</tbody>
</table>

* estimate is preliminary and subject to change.
Source: Overseas estimates are extrapolated from aggregate card usage data provided by Visa Vue® Travel and incorporate data from other research sources.
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### Highlights: Spending

- Chinese visitor spending (excluding Hong Kong) in the U.S. averaged $7,200 per visitor in 2013, the highest of all international travelers visiting the U.S.
- Indian travelers visiting the U.S. spent $7.3 billion in the country during 2013, making them the seventh-highest spenders.

#### INDIA, CHINA, AUSTRALIA MARKETS SPENDING

This table shows visitor spending by the ICA countries for the most recent year with year-over-year change and compares the spending contribution of the different countries to Florida’s total international visitor spending.

<table>
<thead>
<tr>
<th></th>
<th>2013 Spend</th>
<th>2014* Spend</th>
<th>2014/13 % Change*</th>
<th>% of ICA Markets*</th>
<th>% of Total International*</th>
</tr>
</thead>
<tbody>
<tr>
<td>ICA Markets</td>
<td>$607,700,000</td>
<td>$572,000,000</td>
<td>-5.9%</td>
<td>100.0%</td>
<td>3.4%</td>
</tr>
<tr>
<td>India</td>
<td>$78,300,000</td>
<td>$79,100,000</td>
<td>1.1%</td>
<td>13.8%</td>
<td>0.5%</td>
</tr>
<tr>
<td>China</td>
<td>$285,000,000</td>
<td>$286,400,000</td>
<td>0.5%</td>
<td>50.1%</td>
<td>1.7%</td>
</tr>
<tr>
<td>Australia</td>
<td>$244,400,000</td>
<td>$206,500,000</td>
<td>-15.5%</td>
<td>36.1%</td>
<td>1.2%</td>
</tr>
</tbody>
</table>

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Note: Overseas spending estimates reflect face-to-face card transactions and cash withdrawn in Florida, not transactions made overseas or online. Source: Source: Overseas estimates are extrapolated from aggregate card usage data provided by Visa Vue® Travel for 2012 and incorporate data from other research sources.
INDIA
India is the world’s second-most populous country and the second-fastest growing country for outbound departures. India’s real GDP is forecast to increase at an annual rate of 5-6 percent and outbound travel to the U.S. is projected to follow a similar path.

Outside the Middle East, the U.S. is the top long-haul destination for Indians.

Although Florida currently does not have non-stop air service from India, Florida does have non-stop service from the Middle East. With the expansion of the Middle East airlines, the future potential for direct flights is strong.

INDIA VOLUME
Indian visitation to Florida has grown steadily since 2010.

<table>
<thead>
<tr>
<th>Country</th>
<th>2010</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014*</th>
</tr>
</thead>
<tbody>
<tr>
<td>India</td>
<td>35,000</td>
<td>41,000</td>
<td>44,000</td>
<td>46,000</td>
<td>50,000</td>
</tr>
<tr>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Australia</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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Highlights: India
- More than a quarter of Indian travelers visiting the U.S. reported that it was their first trip to the country.
- Approximately 32 percent of Florida’s Indian visitors indicated their main trip purpose was to visit friends or relatives.
- The top information sources for trip planning used by Florida’s Indian visitors are a travel agency office (36%) and an airline (32%).
- Florida’s Indian visitors primarily traveled to the state’s Southeast region (45%) and the Central-Central East region (43%).

PARTNER TOOLS
TOP INTERNATIONAL COUNTRIES FOR FLORIDA REGIONS
ICA MARKETS COMPARISON
ICA MARKET COUNTRY PROFILES
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![India spend chart]

**India Spend**

Indian spending while in the state has grown since 2010.

- **2010**: $69M
- **2011**: $86M
- **2012**: $85M
- **2013**: $78M
- **2014**: $79M

* estimate is preliminary and subject to change

Note: Overseas spending estimates are based on face-to-face card transactions and cash withdrawn in Florida, not transactions made overseas or online.

Source: Overseas estimates are extrapolated from aggregate credit card data provided by VisaVue Travel and incorporate data from other independent research sources.
China is the fastest-growing inbound market to the United States. China’s middle class has been rapidly expanding. Many estimates indicate its actual size today is equivalent to the U.S. population.

In spite of minimal marketing investment by Florida and lack of direct flights, the number of Chinese travelers visiting Florida grew from 60,000 in 2009 to 267,000 in 2014. The potential for continued growth is strong and global competition for China’s growing outbound travelers is fierce.

Highlights: China
- Nearly half of the U.S.’s Chinese visitors reported traveling to the country for the first time.
- Most of Florida’s Chinese visitors reported that their main trip purpose was business or a convention/conference/trade show (26%), followed by a vacation/holiday (25%).
- Florida’s Chinese visitors’ top trip planning information sources were personal recommendations (32%), an airline (32%), and travel agency office (20%).
CHINA

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CHINA SPEND

Chinese spending while in the state has grown significantly since 2010.

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AUSTRALIA

Australia is one of Florida’s top 10 origin countries for international visitors. Historically, outbound Australian travel has generally followed trends in GDP growth and consumer spending. Australia’s GDP growth is projected to slow and stabilize at 2-3 percent through 2018. Outbound travel is projected to grow at an average of 3 percent. At the same time, U.S. arrivals are forecast to grow by an average rate of 4 percent.

Australians typically visit Florida as part of a multi-state itinerary. Tour operator interest in Florida is growing.

<table>
<thead>
<tr>
<th>AUSTRALIA VOLUME</th>
<th>VOLUME</th>
<th>SPEND</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2010</td>
<td>173,000</td>
<td></td>
</tr>
<tr>
<td>2011</td>
<td>258,000</td>
<td></td>
</tr>
<tr>
<td>2012</td>
<td>281,000</td>
<td></td>
</tr>
<tr>
<td>2013</td>
<td>317,000</td>
<td></td>
</tr>
<tr>
<td>2014*</td>
<td>319,000</td>
<td></td>
</tr>
</tbody>
</table>

* volume estimate is preliminary and subject to change.
Source: Overseas estimates are extrapolated from aggregate credit card data provided by VisaVue Travel and incorporate data from other independent research sources.

Highlights: Australia

- Florida’s Australian visitors made their decision to travel 5.7 months before departing on their trip.
- More than half of Australian travelers visiting Florida used a travel agency office (57%) to plan their trip, while 33 percent used airlines websites and resources.
- On average, Florida’s Australian visitors traveled to 3.6 states and stayed in Florida for 6.6 nights.
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Foundation Five Markets
In these markets, the challenge is allocating a limited budget to serve three competing goals: maintaining current volume, expanding efforts where growth opportunities exist, and defending against rising competition.

ICA Markets
Given the magnitude of growth projected for outbound travel from China and India, Florida must ramp up quickly on both the marketing and hospitality service side. The cultural learning curve and language differences may prove challenging.

INSIGHTS AND OPPORTUNITIES
Across Foundation Five and ICA markets, five challenges prevail either as barriers to or predictors of success.
LIFT
Airlift is a critical component in Florida’s marketing equation and nowhere is that more evident than for international visitors. Expanding convenient access from Florida’s international feeder markets is essential for international market development.

In northern South America, Central America and Mexico low-fare carriers are already expanding service to major gateways and beyond. The opportunity for airline-DMO partnership is growing. Europe is also seeing an expansion of low-fare carriers into long-haul service. For Florida, low-fare expansion means an opportunity to grow service to new Florida destinations.

In Asia, the creation of a pre-clearance facility at Abu Dhabi, combined with growth from carriers that serve the region, may stimulate route development that better suits Florida. The opportunity for new and improved lift exists – if Florida can marshal its resources.

INSIGHTS AND OPPORTUNITIES
Across Foundation Five and ICA markets, five challenges prevail either as barriers to or predictors of success.
PARTNERSHIPS
In-country travel industry partnerships are critical because they multiply Florida’s limited investments through co-op marketing efforts. In countries and markets where Florida has strong co-op partnerships with powerful travel brands, Florida has been able to increase the relevance of its messaging and achieve greater presence. Traditionally, the international co-op partners also provide an important conversion call to action.

INSIGHTS AND OPPORTUNITIES
Across Foundation Five and ICA markets, five challenges prevail either as barriers to or predictors of success.
BRAND
In many countries, the Florida brand is well established and Florida will continue to expand and build on consumer awareness in a variety of ways. In countries where Florida is less familiar, the advent of Brand USA provides the opportunity to leverage interest in the U.S. as well as co-op buying power to the benefit of the Florida brand. Florida’s strong network of industry partners offers unique opportunities for collaborative efforts that have the potential to trump competitive brands in specific global markets.

INSIGHTS AND OPPORTUNITIES
Across Foundation Five and ICA markets, five challenges prevail either as barriers to or predictors of success.
Digital Landscape
Consumer media consumption patterns and preferences differ from market to market and effective communications take national and cultural boundaries into consideration. However, in a global digital environment, there are few boundaries. Consumers will access the Florida brand in multiple ways outside their own national and cultural walls. Local preferences must be balanced against global brand consistency. Florida must establish and sustain a stronger digital presence that reinforces brand truths that are relevant across all markets.

Insights and Opportunities
Across Foundation Five and ICA markets, five challenges prevail either as barriers to or predictors of success.
## INTERNATIONAL TRADE & EVENTS CALENDAR

### JULY 2015
- **NEW** India AVIAREPS Roadshow 7/1-1/2015 TBD
- **NEW** Gala Awards Dinner - VUSA Ball 7/2/2015 London, England
- **NEW** DMAI 7/14-17/2015 Austin, TX

### AUGUST 2015
- **NEW** IncentiveWorks 8/1-1/2015 Toronto, Ontario
- **NEW** India AVIAREPS Roadshow 8/1-1/2015 TBD
- **NEW** Brand USA Seminars India 8/1-1/2015 India
- **NEW** US Consulates Roadshow China 8/1-1/2015 China
- **NEW** Toronto VIP Event (M&C) 8/1-1/2015 Canada
- **NEW** Governor’s Conference 8/31-9/2/2015 Tampa, FL

### SEPTEMBER 2015
- **NEW** Peru & Ecuador Sales Mission 9/1-1/2015 Peru, Ecuador
- **NEW** VISIT FLORIDA Signature Event 9/1-1/2015 France
- **NEW** La Cita 9/1-1/2015 Boca Raton, FL
- **NEW** La Cita FAMs 9/1-1/2015 TBD
- **NEW** Brand USA MICE Event 9/1-1/2015 Goa, India
- **NEW** Brand USA India Mission 9/1-1/2015 Mumbai, New Delhi, & Chennai, India
- **NEW** UK Key Client Dinner 9/1-1/2015 Crawley, England
- **NEW** China Trade FAM 9/1-1/2015 TBD
- **NEW** Routes World Forum 9/1-1/2015 Durbin, South Africa
- **NEW** Routes Rendezvous 9/1-1/2015 Durbin, South Africa
- **NEW** Oktoberfest 9/1-1/2015 Munich, Germany
- **NEW** ABAV 9/1-1/2015 Sao Paulo, Brazil
- **NEW** FIT VIP Event 9/1-1/2015 Buenos Aires, Argentina
- **NEW** FIT 9/1-1/2015 Buenos Aires, Argentina
- **NEW** World Medical Tourism & Global Healthcare Congress 9/1-1/2015 Orlando, FL

### OCTOBER 2015
- **NEW** VIP Trade Event (Agents) 10/1-1/2015 Canada
- **NEW** Mexico VIP Event 10/1-1/2015 TBD
- **NEW** Canadian Roadshow 10/1-1/2015 Canada
- **NEW** Colombia Workshop 10/1-1/2015 Bogota, Colombia
- **NEW** Nordic Sales Mission 10/1-1/2015 Denmark, Norway, Sweden
- **NEW** SIFV (Montreal) 10/1-1/2015 Montreal, Quebec
- **NEW** US Consulates Road Show 10/1-1/2015 China
- **NEW** India Trade FAM 10/1-1/2015 Florida
- **NEW** ITB Asia 10/1-1/2015 Suntec, Singapore

### NOVEMBER 2015
- **NEW** US Consulates Road Show 11/1-1/2015 China
- **NEW** WTM VF Signature Event 11/1-1/2015 London, England
- **NEW** World Travel Market 11/1-1/2015 London, England
- **NEW** IBTM 11/1-1/2015 Barcelona, Spain
- **NEW** Consumer Show Series- Leipzig 11/1-1/2015 Leipzig, Germany

### DECEMBER 2015
- **NEW** Marketing Retreat 12/1-1/2015 Fort Lauderdale, FL
# International Trade & Events Calendar

<table>
<thead>
<tr>
<th>DATE</th>
<th>LOCATION</th>
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</thead>
<tbody>
<tr>
<td><strong>JANUARY 2016</strong></td>
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<tr>
<td>1/TBD/2016</td>
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<tr>
<td><strong>FEBRUARY 2016</strong></td>
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<td>2/TBD/2016</td>
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<tr>
<td>2/1/2016</td>
<td>Bogota, Colombia</td>
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<td>2/TBD/2016</td>
<td>TBD</td>
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<tr>
<td>2/9-10/2016</td>
<td>New York City</td>
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<td>2/TBD/2016</td>
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<tr>
<td><strong>MARCH 2016</strong></td>
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<td>4/TBD/2016</td>
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<td><strong>JUNE 2016</strong></td>
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<td>6/TBD/2016</td>
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<tr>
<td><strong>ONGOING</strong></td>
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<tr>
<td>ongoing</td>
<td>Canada</td>
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<td>ongoing</td>
<td>UK/Ireland</td>
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<tr>
<td>ongoing</td>
<td>France</td>
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<tr>
<td>ongoing</td>
<td>Latin America</td>
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<tr>
<td>ongoing</td>
<td>Germany, Switzerland</td>
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<td>ongoing</td>
<td>China</td>
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<td>ongoing</td>
<td>India</td>
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<tr>
<td>ongoing</td>
<td>India</td>
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<table>
<thead>
<tr>
<th><strong>DATE</strong></th>
<th><strong>LOCATION</strong></th>
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<tbody>
<tr>
<td><strong>APRIL 2016</strong></td>
<td></td>
</tr>
<tr>
<td>WTM - LATAM 4/TBD/2016</td>
<td>Sao Paulo, Brazil</td>
</tr>
<tr>
<td>US Consulates Road Show 4/TBD/2016</td>
<td>China TBD</td>
</tr>
<tr>
<td>Key Client Dinners 4/TBD/2016</td>
<td>London, England</td>
</tr>
<tr>
<td>China Sales Mission 4/TBD/2016</td>
<td>Shanghai, Beijing, Shenzhen, China</td>
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<tr>
<td>IMEX 4/TBD/2016</td>
<td>TBD</td>
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<tr>
<td><strong>MAY 2016</strong></td>
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<tr>
<td>China Trade FAM 5/TBD/2016</td>
<td>TBD</td>
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<tr>
<td>Arabian Travel Mart 5/TBD/2016</td>
<td>Dubai, UAE</td>
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<tr>
<td>UK/Ireland Sales Mission 5/24-26/2016</td>
<td>TBD</td>
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<tr>
<td>Ireland Tour Operator Advisory Luncheon 5/TBD/2016</td>
<td>Dublin, Ireland</td>
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<tr>
<td><strong>JUNE 2016</strong></td>
<td></td>
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<tr>
<td>Int'l Pow Wow (IPW) 6/18-22/2016</td>
<td>New Orleans, LA</td>
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<tr>
<td>VF Signature Airline Event 6/TBD/2016</td>
<td>TBD</td>
</tr>
<tr>
<td>US Consulates Road Show 6/TBD/2016</td>
<td>China</td>
</tr>
</tbody>
</table>

**ONGOING**

University of VF (Specialist Program) ongoing Canada
UK Sales Calls ongoing UK/Ireland
France Sales Calls ongoing France
Latin America Sales Calls ongoing Latin America
Europe Sales Calls ongoing Germany, Switzerland, Austria
China Sales Calls ongoing China
India Sales Calls ongoing India
E-learning (specialist program) ongoing India
BUSINESS TRAVEL VOLUME
2013

Data for 2013 business travel is derived from domestic visitation only.
Source: D.K. Shifflet & Associates

IMPORTANCE
OF THE MEETING AND CONVENTIONS MARKET

In 2013, roughly 9.2 million business travelers accounted for 11 percent of Florida’s domestic visitors, slightly up from 2012.

More than half of business travelers to Florida in 2013 came for conventions, meetings, seminars and training. More than two-thirds of business visitors to Florida travel alone and go to the central and southeast regions of the state.
BUSINESS TRAVEL PURPOSE

2013
Data for 2013 business travel is derived from domestic visitation only. This chart shows the reason for travel by Florida’s business visitors – who account for 11 percent of all Florida’s visitors.

Note: Transient business includes travel primarily for consulting/client services, inspection/audit, construction/repair, sales/purchasing, government/military, and other business.

Source: D.K. Shifflet & Associates

IMPORTANCE

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BUSINESS VS. LEISURE SPEND
AVERAGE EXPENDITURES PER DAY BY CATEGORY (2013)
This chart compares the average daily spending of Florida’s business and leisure visitors by category. As shown by the chart, business visitors spend more in transportation, lodging and food & beverage than leisure visitors.

Source: D.K Shifflet & Associates

At $260 per day including transportation, the business traveler to Florida spends $115 more per day than the domestic leisure traveler. Business visitors spend 90 percent more on lodging and 33 percent more on food and beverage. The business visitor also spends nearly three times the amount leisure visitors spend on transportation.
2015 looks to be a great year for the meetings industry and future indicators all point to continued growth. An improving economy, especially in the U.S., is facilitating a renewed investment in meetings and conventions.

The rising demand for meetings will likely drive increased venue costs while meeting planner budgets are expected to remain the same. Budget limitations will force planners to be more resourceful with their funds and require suppliers to offer creative solutions within their proposals.

Highlights

- Nearly half the planners surveyed by MPI report arranging their meetings on shorter notice. North American lead times have decreased by 9 percent over the past year, but remain longer than the global average.
- According to MPI, meeting budgets are expected to increase between 1-5 percent - not enough to keep up with the increase in costs.
- Virtual meetings attendance is expected to grow about 3 percent in the coming year. Around 60 percent of planners plan to leverage virtual and hybrid meeting options.

As reported by Benchmark Resorts and Hotels®

1. Adventure + Inspiration - Planners are looking to deliver ROE (Return On Experience) through programming in addition to ROI.
2. Tides have turned – Demand for group meetings has officially rebounded and rates are trending up.
3. Top planners have mapped a way to connect social at each stage of the event cycle. LinkedIn, Twitter, Instagram and smart phone apps are the top tools of the trade.
4. Get wired – Attendees often come with multiple wireless devices and demand powerful and reliable Wi-Fi in both the meeting space and their guest rooms.
5. Smart phones are a critical business tool for planners, attendees and suppliers. Planners are seeking ways to integrate mobile devices throughout the entire event experience.
6. Event packages can be completely customizable to the planner’s exact needs and specifications.
8. It’s about the food – Resident chefs and F&B Directors are vital to securing business. Bringing chefs into the decision-making process with menu customization options have become a significant part of the meeting planning process.
9. High-end boutique and personal luxury properties – once shied away from by planners – are now sought-after venues for important and especially high-level meetings.
10. Sense of place - Conference facilities offering a variety of meeting spaces are in high demand. Planners are looking for an ever growing number of breakout rooms and unique gathering places.

VISIT FLORIDA approaches the Meetings and Conventions market in two ways: by business segment and by affinity to Florida. Business segments are defined according to the type of organization holding the event. This segmentation allows VISIT FLORIDA to refine and focus messaging as well as leverage the distribution channels for each business segment. Segmentation by affinity enables VISIT FLORIDA to focus on planners who have the highest propensity to choose Florida as their destination.
FLORIDA'S IMAGE
As a meetings destination, Florida excels in a number of important categories. In addition to the outstanding destination and activity ratings expected of a global leisure destination, Florida also offers the advantage of high appeal with attendees, reasonable room rates and meeting costs, as well as affordable access.

Highlights
• Florida significantly outpaces other meeting destinations in outdoor recreation, beaches and golf.
• In most categories, Florida is rated 50 percent higher than other destinations.

Source: STR, Inc. DestinationMAP for VISIT FLORIDA
ASSOCIATIONS, CORPORATE, SMERF/OTHERS AND SPORTS

The meetings industry is generally organized into four business segments: Associations, Corporate/Incentive, SMERF and Sports. VISIT FLORIDA reaches these four market segments through partnerships with the leading meetings and conventions industry organizations.

**Associations.** With more than 1.9 million associations worldwide, this segment is important to VISIT FLORIDA. This business category includes non-profit organizations, universities and government agencies.

**Corporate/Incentive.** This business segment includes for-profit organizations and businesses that use in-house or outside meeting planners to coordinate corporate meetings, trade shows and conventions, sales meetings and incentive travel. In the past few years, incentive travel has rebounded in the Sunshine State, with coastal properties seeing a 20- to 25-percent increase in this segment.

**SMERF.** The SMERF segment includes independent planners who represent social/sports, military, education, religious and fraternal organizations. Third-party planners are also included in the category.

**SPORTS.** Florida has a competitive advantage in the sports market, with year-round mild climate and diverse opportunities in the small, medium and large destinations in Florida. This segment continues to be stable in any economic situation.
AFFINITY TO FLORIDA

Florida’s strength as a repeat destination for leisure travel holds true for meetings and conventions. Research has demonstrated that those who have previously held meetings in the Sunshine State are most likely to do so again. Given the 18- to 32-month planning cycle, keeping Florida top of mind requires maintaining contact with the most likely prospects throughout the planning cycle.

HIGH AFFINITY

Meeting planners who have held a meeting in Florida in the past 3 years or plan to in the next 3 years.

LOW AFFINITY

Meeting Planners who have not held a Florida meeting and are not currently planning one.

Highlights

• High-affinity meeting planners are more likely than low-affinity planners to be from the South (34% high, 24% low) and less likely to be from the West (4% high, 22% low).

• High-affinity and low-affinity meeting planners are equally likely to hold major meetings that rotate among a set of destinations.

• The number of meetings that planners are organizing is on the rise. In the past year, high-affinity planners saw a 77 percent increase in the number of meetings planned (from 22 to 39) and low-affinity planners saw a 64-percent increase (from 14 to 23).

• High-affinity and low-affinity planners book the majority of their major meetings in the U.S.

• The high-affinity meeting planners are slightly more connected through social media, with an average of 11 social/business networks, compared to 5 for the low-affinity planner.
California, Chicago, Las Vegas and Texas remain the most popular competitive destinations where planners have hosted a meeting in the past three years. Between 2011 and 2013, California has taken the lead as a competing destination. Nevada (Las Vegas) has made significant gains over other competing destinations.
BUSINESS MEETING SITE

Florida rates exceptionally well as a business and convention destination. In a 2013 survey conducted by STR, Inc., meeting planners rated Florida 8.7 out of 10 as an ideal convention site, well ahead of the average rating by other destinations (7.3). Among planners who know Florida, there is an even more positive perception. Meeting planners who have held a meeting in Florida in the past three years (or plan to in the next three years) rate Florida higher than any competitive destinations. However, among planners who have not held a meeting in Florida in the past three years or are not planning to, Chicago and Southern California rank higher.

Source: STR, Inc. DestinationMAP for VISIT FLORIDA

Highlights

- Six Florida cities rank in Cvent’s Top 50 Meetings Destinations for 2014: Orlando, 2; Miami, 13; Kissimmee, 24; Tampa, 30; Fort Lauderdale, 32; Hollywood, 38.

- Two Florida cities (Orlando and Miami) dominate almost 20 percent of the total number of meeting hotels for the top 15 cities on Cvent’s Top 50 list.
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**Highlights**

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- Two Florida cities (Orlando and Miami) dominate almost 20 percent of the total number of meeting hotels for the top 15 cities on Cvent’s Top 50 list.

![DESTINATION RATINGS AS A CONVENTION SITE](chart.png)

Source: STR, Inc. DestinationMAP for VISIT FLORIDA
INSIGHTS
AND OPPORTUNITIES

VISIT FLORIDA uses five insights to prioritize and customize an approach to maintain share and increase the number of meetings held throughout the state.

TOP FIVE ATTRIBUTES
Florida continues to excel in the five attributes most important to meeting planners in selecting a site: convenient air service; easy access to major airports; reasonable food and lodging costs; affordable travel costs; and diverse hotel options.
### IMPORTANCE OF REFERENCES AND WORD OF MOUTH
The majority of planners choose their event location based on previous experience, attendee feedback, and the reputation/image of the destination – all factors that work well for Florida. As Florida marketers are fond of saying, “those who know us, love us,” which suggests a potential opportunity to gain even more business by better leveraging the positive recommendations of highly successful and satisfied planners.

### INSIGHTS AND OPPORTUNITIES
VISIT FLORIDA uses five insights to prioritize and customize an approach to maintain share and increase the number of meetings held throughout the state.
INSIGHTS AND OPPORTUNITIES

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AFFINITY

Although Florida stands out as a meeting destination among both high-and low-Florida affinity planners, there is an opportunity to better promote Florida business attributes to these groups.
DIGITAL ADOPTION
Meeting planners are increasingly looking to technology to help make site selection easier. Smart phone and tablet usage is increasing among planners and as a component of meetings. High-affinity planners are even more connected to social media, presenting an opportunity for Florida to better serve and connect with its industry.

INSIGHTS AND OPPORTUNITIES
VISIT FLORIDA uses five insights to prioritize and customize an approach to maintain share and increase the number of meetings held throughout the state.
Because Florida is both a business and leisure destination, business travelers offer cost effective conversion opportunities for the leisure market.

### BUSINESS TRAVEL

VISIT FLORIDA uses five insights to prioritize and customize an approach to maintain share and increase the number of meetings held throughout the state.
## MEETINGS, TRADE AND EVENTS CALENDAR

<table>
<thead>
<tr>
<th>DATE</th>
<th>LOCATION</th>
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<tbody>
<tr>
<td>JULY 2015</td>
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<td></td>
<td>DMAI 101st Annual Convention</td>
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<td>AUGUST 2015</td>
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<td>MP</td>
<td>MPI-WEC</td>
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<td>MP</td>
<td>MPI-SEC</td>
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<tr>
<td>MP</td>
<td>Connect Marketplace</td>
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<td></td>
<td>SYTA</td>
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<tr>
<td>SEPTEMBER 2015</td>
<td>Florida Governor's Conference</td>
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<td>OCTOBER 2015</td>
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<tr>
<td>MP</td>
<td>IMEX America</td>
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<td>NOVEMBER 2015</td>
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<td>DECEMBER 2015</td>
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<td>JANUARY 2016</td>
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<tr>
<td>MP</td>
<td>PCMA Annual Meeting: Convening Leaders</td>
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<td>American Bus Association</td>
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<td>The New York Times Travel Show</td>
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<tr>
<td>FEBRUARY 2016</td>
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<tr>
<td></td>
<td>VISIT FLORIDA TRADE EVENT - Dallas</td>
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<td></td>
<td>VISIT FLORIDA TRADE EVENT - Chicago</td>
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<td>MARCH 2016</td>
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<td>MP</td>
<td>VIP - Atlanta</td>
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<td>APRIL 2016</td>
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<td>VIP - Boston</td>
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<td>JUNE 2016</td>
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<tr>
<td>MP</td>
<td>Collaborate Marketplace</td>
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<tr>
<td>MP</td>
<td>VIP - New York</td>
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</table>

**Italicized denotes a program produced by VISIT FLORIDA**  
**MP Denotes VIP Meeting Planner Events**  
***Denotes VISIT FLORIDA participation only**  
**VISIT FLORIDA Trade Events**  
Meeting Planner Trade Shows and Conferences  
Group/Tour Operator Marketplaces  
Consumer Travel Shows
### 2015-16 MARKETING STRATEGIES

- Maintain domestic year-round in-market presence
- Build brand awareness in future markets of importance, focusing on the ICA Markets (India, China, Australia)
- Create media overlap between audience passions and geo/demo target segments
- Develop a global social influencer platform
- Target regional growth based on capacity
- Develop a program for engaging brand advocates and leveraging their content to promote Florida
- Increase visitor spend through yield-focused growth initiatives for product and audience development
- Increase Florida’s market share and conversion by expanding alignment and co-marketing with Florida’s tourism industry
- Increase the value of the VISIT FLORIDA digital platform to Partners
- Leverage the attraction power and budget of star brands through Strategic Alliance Partnerships
- Build Florida momentum in the Foundation Five Market
- Create unique relationship-building opportunities for Partners that enhance their business
- Build International Air-Lift
- Optimize VISIT FLORIDA departmental capabilities
- Maintain trade relationships in expanded international markets through Trade Co-ops

### DEPARTMENTAL PLANS

In fiscal year 2015-16, VISIT FLORIDA will focus on growing share in specific demographic segments and expanding our global footprint. Maintaining a Florida presence throughout the year in key origin markets while investing in cross-departmental integrated projects will continue to support Florida’s brand positioning and record tourism numbers.

This vision will be achieved by aligning departmental efforts with 15 strategies focused on VISIT FLORIDA’s eight 2020 objectives.
## DEPARTMENTAL TACTICS

<table>
<thead>
<tr>
<th>1</th>
<th>Award advertising matching grants to promote Florida tourism</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Continue to integrate the Welcome Centers into VISIT FLORIDA marketing and digital platforms</td>
</tr>
<tr>
<td>3</td>
<td>Create integrated campaigns in top feeder markets</td>
</tr>
<tr>
<td>4</td>
<td>Develop and foster marketing partnerships that gain media exposure and in-market engagement</td>
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<tr>
<td>5</td>
<td>Increase the value of co-op to Partners by developing year-round and bundled packages</td>
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<tr>
<td>6</td>
<td>Leverage past campaign landing page performance and site analytics to enhance seasonal campaign landing pages</td>
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<tr>
<td>7</td>
<td>Leverage social conversation to enhance seasonal in-market campaigns</td>
</tr>
<tr>
<td>8</td>
<td>Leverage VISIT FLORIDA content for year-round domestic marketing campaigns</td>
</tr>
<tr>
<td>9</td>
<td>Maintain agency relationships that allow VISIT FLORIDA to be efficient and scale</td>
</tr>
<tr>
<td>10</td>
<td>Maintain ongoing search presence</td>
</tr>
<tr>
<td>11</td>
<td>Maintain year-round brand presence with seasonal campaigns targeting domestic travelers</td>
</tr>
<tr>
<td>12</td>
<td>Promote engagement with #LoveFL across different audiences and passions</td>
</tr>
<tr>
<td>13</td>
<td>Promote new website features to potential visitors as a way to ease travel planning or increase consideration for our destination</td>
</tr>
<tr>
<td>14</td>
<td>Leverage social conversation to enhance seasonal in-market campaigns</td>
</tr>
</tbody>
</table>
### DEPARTMENTAL TACTICS

<table>
<thead>
<tr>
<th></th>
<th>ADVERTISING</th>
<th>COMMUNICATIONS</th>
<th>INDUSTRY RELATIONS</th>
<th>INTERNATIONAL</th>
<th>MEETINGS</th>
<th>PROMOTIONS</th>
<th>VISITOR SERVICES</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Align collaborative pitching with press visits and media relations that support earned media results for the brand</td>
<td>8</td>
<td>Create annual New York City media reception for Partners to interact with top domestic media and social influencers</td>
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<tr>
<td>2</td>
<td>Attend tourism-focused, diversity-related conferences and events, and strengthen relations with media</td>
<td>9</td>
<td>Create influencer campaign to reach social communities to promote awareness, engagement and advocacy</td>
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<tr>
<td>3</td>
<td>Build and sustain relations with media and social influencers throughout the ICA markets</td>
<td>10</td>
<td>Develop PR campaign in conjunction with one major domestic ad campaign that provides partner co-op</td>
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<tr>
<td>4</td>
<td>Build social media platforms and presence in at least two of five Foundation Five markets</td>
<td>11</td>
<td>Execute trade and consumer media relations at international conferences</td>
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<tr>
<td>5</td>
<td>Collaborate with DMO Partners each quarter to pitch stories and host media visits that yield a larger awareness footprint of the state through earned media</td>
<td>12</td>
<td>Expand awareness of owned content through media pitching, digital diversity (media site, social, communications distribution platforms) and influencer channels (bloggers, social)</td>
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</tr>
<tr>
<td>6</td>
<td>Create and maintain editorial calendar to promote consumer engagement on social media</td>
<td>13</td>
<td>Plan and execute media receptions and desk side missions in domestic and international markets to provide opportunities for Partners that build awareness and engagement</td>
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<tr>
<td>7</td>
<td>Create and support significant marketing and PR campaigns that sustain and grow the Florida brand</td>
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</tbody>
</table>
### DEPARTMENTAL TACTICS

<table>
<thead>
<tr>
<th></th>
<th>Build stronger knowledge base and analytics around VISITFLORIDA.org and its use</th>
<th>Execute two direct mail campaigns during key time periods to drive Partnership enrollment</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Continually promote VISIT FLORIDA programs and opportunities through industry social media channels</td>
<td>Focus on increasing alignment with broad-reaching Florida relevant brands</td>
</tr>
<tr>
<td>3</td>
<td>Create a dashboard to provide customized listing and ROI information for Partners</td>
<td>Host Partner Roadshows to share marketing programs and news with the industry</td>
</tr>
<tr>
<td>4</td>
<td>Develop industry-driven content that promotes the value of a VISIT FLORIDA Partnership</td>
<td>Improve current integration with Salesforce &amp; ExactTarget</td>
</tr>
<tr>
<td>5</td>
<td>Develop new online hospitality training modules and partner with DMOs to promote and roll out to industry</td>
<td>Make adjustments to Partner Benefits Platform to provide more exclusive opportunities for VISIT FLORIDA Marketing Partners</td>
</tr>
<tr>
<td>6</td>
<td>Develop programs that provide education/thought leadership for industry</td>
<td>Partner with trade associations to reach larger audiences</td>
</tr>
<tr>
<td>7</td>
<td>Engage with and educate Partners though marketing consultations and sales calls</td>
<td>Provide opportunities for IR staff to attend conferences and workshops that provide professional development</td>
</tr>
</tbody>
</table>
## DEPARTMENTAL TACTICS

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<table>
<thead>
<tr>
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<tbody>
<tr>
<td>1</td>
<td>Coordinate FAMs throughout the year for the Foundation Five and ICA markets</td>
</tr>
<tr>
<td>2</td>
<td>Coordinate International Trade FAMs around Florida Huddle</td>
</tr>
<tr>
<td>3</td>
<td>Create and implement an India Roadshow</td>
</tr>
<tr>
<td>4</td>
<td>Create international co-op opportunities for Partners, leveraging the Florida Brand</td>
</tr>
<tr>
<td>5</td>
<td>Create trade events, tour operator programs, signature events and missions</td>
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<tr>
<td>6</td>
<td>Develop and maintain relationships with airlines and airports to support route development</td>
</tr>
<tr>
<td>7</td>
<td>Develop educational programing for travel trade</td>
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<tr>
<td>8</td>
<td>Develop relationships with influential product managers through sales missions and sales calls</td>
</tr>
<tr>
<td>9</td>
<td>Expand distribution of content for international markets</td>
</tr>
<tr>
<td>10</td>
<td>Expand the Air Team Florida program to include air-focused co-ops</td>
</tr>
<tr>
<td>11</td>
<td>Participate in Brand USA trade opportunities and leverage Brand USA at key VISIT FLORIDA events</td>
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<td>DEPARTMENTAL TACTICS</td>
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</tr>
<tr>
<td>1</td>
<td>Attend and coordinate tourism-focused, diversity-related conferences and events to strengthen relationships with meeting planners and travel trade</td>
</tr>
<tr>
<td>2</td>
<td>Continue evolving the Business Plus initiative</td>
</tr>
<tr>
<td>3</td>
<td>Coordinate city-wide grants with Florida partners to increase meetings opportunities within the state</td>
</tr>
<tr>
<td>4</td>
<td>Coordinate diversity grants to increase opportunities within the state</td>
</tr>
<tr>
<td>5</td>
<td>Create unique Partner opportunities at trade shows and signature events</td>
</tr>
<tr>
<td>6</td>
<td>Develop VIP signature events in the Super 8 markets to engage and educate meeting planners and travel trade</td>
</tr>
<tr>
<td>7</td>
<td>Expand relationships with Meetings media through FAM trips, communication programs and targeted story pitching</td>
</tr>
<tr>
<td>8</td>
<td>Focus on developing the international meetings market</td>
</tr>
<tr>
<td>9</td>
<td>Increase the relevance of VISIT FLORIDA-owned and -operated events</td>
</tr>
<tr>
<td>10</td>
<td>Increase VISIT FLORIDA brand awareness at key trade shows</td>
</tr>
<tr>
<td>11</td>
<td>Leverage best-in-class Partnerships to extend the Florida Meetings message through larger channels</td>
</tr>
<tr>
<td>12</td>
<td>Organize Meetings Mega-FAM to educate planners on variety of Florida assets</td>
</tr>
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<tbody>
<tr>
<td>1</td>
<td>Conduct partner tours for relationship building with industry partners</td>
</tr>
<tr>
<td>2</td>
<td>Conduct sales calls for relationship building in key domestic markets</td>
</tr>
<tr>
<td>3</td>
<td>Coordinate promotions featuring unique experiences, less traveled destinations and multi-destination prize packages</td>
</tr>
<tr>
<td>4</td>
<td>Coordinate promotions in key domestic markets</td>
</tr>
<tr>
<td>5</td>
<td>Coordinate promotions in key international markets</td>
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<thead>
<tr>
<th></th>
<th>Build a state-wide customer service training and certification program for Welcome Center employees</th>
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<tbody>
<tr>
<td>2</td>
<td>Improve Welcome Center staff ability to enhance the visitor experience</td>
</tr>
<tr>
<td>3</td>
<td>Integrate Florida Welcome Centers into brand advocacy campaigns</td>
</tr>
<tr>
<td>4</td>
<td>Integrate Welcome Centers into VISIT FLORIDA’s marketing platforms</td>
</tr>
<tr>
<td>5</td>
<td>Produce Welcome Center takeover events throughout the year</td>
</tr>
<tr>
<td>6</td>
<td>Leverage expertise of Welcome Center staff to educate and serve Florida visitors</td>
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</tbody>
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