2020-2021 Marketing Plan

VISITFLORIDA
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 a not-for-profit corporation created as a public/private partnership by the Florida Legislature in 1996.

As a vital part of Florida’s economy, the tourism industry was responsible for welcoming a record 131.4 million visitors in 2019. Based on the latest economic impact study, Florida visitors contributed $91 billion to Florida’s GDP and supported over 1.5 million Florida jobs. According to the Florida Office of Economic and Demographic Research, for every $1 the state invests in VISIT FLORIDA, $2.15 in state tax revenue is generated.

Each year, the Florida Legislature appropriates public funding to be allocated for tourism marketing. VISIT FLORIDA is required to match this public investment dollar for dollar, by partnering with the state’s tourism industry through cooperative advertising campaigns, promotional programs, and other innovative marketing ventures.

STRATEGIC PLAN

In 2020, representatives of the Florida tourism industry worked together to establish a set of shared ideas intended to inspire and align the entire industry, as a collective. This project consisted of extensive survey work, interviews with industry leaders, and workshops at Florida’s premier tourism conference. This plan is the result of that effort and will guide Florida’s tourism industry through 2024.

VISIT FLORIDA operates the state’s four official Welcome Centers and partners with 13,000+ tourism businesses who represent the full diversity of Florida’s tourism industry. These partners include thousands of small businesses as well as some of the industry’s most iconic companies such as Busch Gardens Tampa, Disney Destinations, The Hertz Corporation, Hilton, LEGOLAND Florida Resort, SeaWorld Parks & Resorts Orlando, and Universal Orlando Resort.

Together, with Florida’s tourism industry, VISIT FLORIDA promotes travel to all areas of the state and protects the economic activity and jobs supported by travel during times of crisis. This economic development program has proven to be one of the most successful in the history of Florida and ensures that each Florida community has the necessary tools to support a vibrant and profitable tourism industry.

Learn more about VISIT FLORIDA: VISITFLORIDA.org
OVERVIEW

Before COVID-19 upended the global tourism economy, Florida had set another visitation record in 2019 and established its most dominant lead ever in 20 years of measuring domestic market share. In other words, through the collaboration of VISIT FLORIDA and its tourism industry partners, we were advancing toward our stated vision of Florida as the No. 1 tourism destination in the world. The public health crisis presents unprecedented challenges – historic job losses, restrictions around air travel, and personal anxiety – but we will start this comeback from a position of strength: a desirable vacation product and a strategic marketing platform that aligns the collective interests of the Florida tourism industry. Let’s go.

STILL THE NO. 1 TRAVEL DESTINATION IN THE WORLD

2020 picked up where 2019 left off for the tourism industry. Hotel demand was up. Domestic and Canadian visitation were on track for another record year. Overseas visitation was a little soft, but that’s been the case for years. Chinese visitation was in trouble due to public health concerns, but the virus was over there. Until it wasn’t.

The First American case of COVID-19 was announced on Jan. 21, 2020. The first Florida case came several weeks later, on March 1. Almost immediately, the floor fell out from beneath the tourism industry.

In March and April, typically high season, visitation vanished and the tourism economy flattened. Hundreds of thousands of Floridians were laid off from their tourism-sector jobs.

THE NEW WORLD

The public health crisis created more uncertainty than the global tourism industry has ever faced. Will airlines survive? What happens to communities dependent on bed tax revenue when there is none? Have people lost their confidence in the safety of travel? What will be the scale of the economic destruction?

It will be months or years before COVID-19 and its fallout are fully understood. But, as with the many crises that preceded this one, the Florida tourism industry has come together to protect and preserve one of the state’s most critical economic engines.

The impacts on Florida’s tourism economy as well as the prognoses are outlined here and throughout the Marketing Plan. On page 31, VISIT FLORIDA offers its marketing insights for meeting this challenge.

MARKETING PRINCIPLES

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

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

DIGITAL FIRST
Constant technological advancement has left the world of marketing in a state of permanent transformation. In order to ensure that VISIT FLORIDA thrives in the future, it must be a marketing company that thinks digital first. We will invest in platforms, partners and people who understand how technology will evolve and can provide VISIT FLORIDA a competitive advantage as a destination marketer.

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

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

FLIGHT CAPACITY UNSETTLED

COVID-19 has placed the fate of air travel in the anxious hands of customers. But when will they feel confident enough about their personal health to fly for hours, elbow to elbow with 200 strangers? In the meantime, scheduled capacity through August is off by more than half year over year. And airlines are going bankrupt, some of them important to Florida tourism destinations.

Air travel, responsible for delivering 54 million visitors in 2019, is in a holding pattern – and just as it was picking up speed. In the 2010s, Florida’s overall visitor volume grew by nearly 50 million and a car became the travel vehicle of choice for almost six of every 10 visitors. But in 2019, air travel grew year over year at a faster pace than drive visitation for the first time since 2011 – from a 40.4 percent share of overall visitor volume to 41.1 percent. COVID-19 changed all that for the foreseeable future.

As the virus spread in China and then Italy, international air travel was shut down in an attempt to slow the contagion. As more American states sheltered in place, domestic demand cratered.

Enplanements at Miami International Airport in April all but vanished – down 96% from April 2019. Airlines hemorrhaged billions of dollars, slashed scheduled flights, and laid off staff.

Among those declaring bankruptcy are:
> Avianca, which in 2019 accounted for 35% of the service from Colombia, Florida’s 4th-largest international market;
> and LATAM, which handled 28% of the lift from Brazil, Florida’s 3rd-largest international market.

So of June 2020, flight capacity to Florida has contracted substantially. Scheduled domestic seats for April-August 2020 are down by 14.9 million, or 42%, compared to the same period in 2019.

The international situation is bleaker still – a year-over-year falloff of nearly 74% for the same time frame. And those red numbers reflect only scheduled decreases in capacity. What’s missing are the 30% to 50% of flights that have been operationally canceled at the last minute. Some analysts are predicting it could be five years before passenger levels recover to 2019 levels.

On June 9 came a bit of good news: The New York Times reported that Florida was a destination of choice as domestic airlines scheduled a limited rebound in July.
INTERNATIONAL TRAVEL'S UNKNOWN DIRECTION

The unpredictable path of COVID-19 makes international travel a volatile industry through 2020 and beyond. As the virus began to spread across the globe, potential travelers stayed home to stay safe. In January, when COVID was identified chiefly in China (or so it was believed at the time), international entry into the United States was up by 0.3%.

As the virus grew into a pandemic, some governments imposed two weeks of self-quarantine on inbound international visitors. Other countries closed their doors altogether. As of June 2020, United States borders remain closed to most non-essential travel, including from Canada and Mexico.

By the end of April, international visitation to the U.S. was down by 48.3% year-to-date. When foreign travelers go through American customs, they are asked for a “first intended address,” or where they intend to spend their first night. From January through April, the number of travelers with a first intended address in Florida decreased by 45.8% from 2019.

The indefinite timetable for international travel restrictions has dramatically affected international air schedules, for some countries more than others.

TRAVELERS ON EDGE

What remains to be seen is how these personal traumas will affect travel behavior and whether tourism businesses in Florida are able to communicate and follow through on safety protocols that make visitors feel safe and, even better, looking forward to a return.

The American Hotel and Lodging Association has advanced Safe Stay guidelines for all of its members. Hotels and vacation rentals, competing now for consumers’ peace of mind, are touting new cleanliness measures – which can only be a good thing.

There is alsoample survey data showing that travel behavior is likely to change. People are hesitant to go to crowded places. Conventions, sporting events, concerts, cruises, and theme parks, all of which rely on putting a lot of people in a relatively small space, may face a delicate decision weighing profits vs. public health.

COVID-19 IMPACTS ON INTERNATIONAL TRAVEL

The table below shows the Florida declines in first intended address (FIA) and scheduled air capacity from Florida’s top international markets.

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>FIA JAN-APR 2020</th>
<th>AIR CAPACITY APR-AUG 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>-55%</td>
<td>-86%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>-43%</td>
<td>-86%</td>
</tr>
<tr>
<td>Brazil</td>
<td>-52%</td>
<td>-87%</td>
</tr>
<tr>
<td>Colombia</td>
<td>-46%</td>
<td>-62%</td>
</tr>
<tr>
<td>Mexico</td>
<td>-48%</td>
<td>-65%</td>
</tr>
<tr>
<td>Germany</td>
<td>-55%</td>
<td>-86%</td>
</tr>
</tbody>
</table>

*Data not currently available.

Sources: U.S. Department of Commerce, Airline Data Inc.

TRAVELERS ON EDGE

The chart below illustrates the extent to which people say these fears will have a lasting impact on their behavior. For each of the activities listed, people were asked: Once the government says the virus is under control, how long would it be before they consider doing the activity again?

The results are grim, suggesting that VISIT FLORIDA and the tourism industry will need to commit to transparent and consistent messaging about safety. When the travel light finally turns green, desire may trump caution. Volume-dependent businesses will have to rethink the way they operate, communicate to travelers in advance, and manage expectations about desired behavior. Rural destinations and outdoor adventures that can tout a built-in advantage – space for visitors to spread out – should be ready to welcome and manage increased traffic.

ACTIVITY DELAYS

This chart shows the length of time people plan to wait after COVID-19 before doing each activity.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Immediately</th>
<th>1-3 Months</th>
<th>2-3 Months</th>
<th>4-6 Months</th>
<th>7-11 Months</th>
<th>1+ Years</th>
<th>Never Again</th>
</tr>
</thead>
<tbody>
<tr>
<td>Go out to dinner</td>
<td>16%</td>
<td>21%</td>
<td>24%</td>
<td>16%</td>
<td>11%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Stay in a hotel</td>
<td>10%</td>
<td>14%</td>
<td>20%</td>
<td>20%</td>
<td>13%</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Go to a sporting event</td>
<td>10%</td>
<td>10%</td>
<td>16%</td>
<td>19%</td>
<td>14%</td>
<td>23%</td>
<td>8%</td>
</tr>
<tr>
<td>Fly on a plane</td>
<td>7%</td>
<td>10%</td>
<td>16%</td>
<td>20%</td>
<td>15%</td>
<td>24%</td>
<td>7%</td>
</tr>
<tr>
<td>Take a cruise</td>
<td>7%</td>
<td>7%</td>
<td>10%</td>
<td>14%</td>
<td>12%</td>
<td>33%</td>
<td>18%</td>
</tr>
</tbody>
</table>

Sources: Harris Poll

ACCOMMODATIONS ATROPHY

Hotels and vacation rentals emerged from their crisis-induced shutdown in late May. Bookings beyond August are hopeful minus any setbacks, but a comeback will take time.

No economic sector – aside from airlines or car rentals – is as dependent on visitors as accommodations. Between March and May 2020, the Florida hotel revenue shortfall exceeded $3 billion.

Hotels are the largest piece of Florida’s accommodations, but vacation rentals and shared accommodations (e.g. Airbnb) are estimated to provide as much as half of the available rooms in the state.

According to AllTheRooms, an accommodation search engine, demand for Airbnb properties in Florida was down by 61% in April, when the state government largely limited rentals to essential workers only. Occupancy was 7%: The estimated decrease in revenue was $78 million.

The chart below shows paid occupancy for vacation rentals for March-December 2019 and the same period in 2020. The solid portions of the line represent actual occupancy, while the dotted portions represent booked occupancy as of June 1. Between March and May 2020, overall occupancy was 31% down from 56.5% the year prior.

Vacation rental bookings for 2020 understandably lag year over year until the end of August, after which 2020 bookings take a slight lead. Communicating and following through on new public health protocols will play an important role in that recovery.

VACATION RENTAL OCCUPANCY

This chart compares vacation rental occupancy (the solid lines) for the March 1-May 30 period in 2019 and 2020.

Forward-looking occupancy (the dotted lines) for 2019 and 2020 was based on reservations made as of June 1.

HOTEL OCCUPANCY

This chart compares statewide weekly hotel occupancy for the March 1-May 30 period in 2019 and 2020.
**Performance Snapshot**

**NINE YEARS OF RECORD VOLUME**

The popularity of Florida vacations, bolstered by destination marketing, has produced 10 years of expansive growth, including nine consecutive years of record visitation. Between 2009 and 2019, the number of annual visitors coming to Florida increased by 62.2%, or 50.4 million additional people.

In 2019, the success story continued. Florida welcomed 116.9 domestic tourists and 14.5 million international tourists, combining for a record 131.4 million visitors – an increase of 3.4% over 2018. Much of this growth has been driven by large increases in domestic visitation. But 2019 also saw a 0.1% rise in overseas travelers – the first such increase since 2015. And then came COVID-19.

**IN THIS SECTION**
- Record Volume
- End of an Era
- Market Share
- Tourism’s Economic Impact
- Hotel Occupancy/Revenue
**END OF AN ERA**

The first quarter of 2020 was off to a solid start. Overseas visitation slowed in January, but the first two months of the year looked good for domestic visitation. Enplanements sustained the upward trend from Q4 of 2019, which had a domestic growth rate of 7.3%.

**MARKET SHARE**

**FLORIDA’S POSITION OF STRENGTH**

In the past several years, much emphasis has been placed on tracking overall visitor volume. And it makes sense why: Top-line visitation to Florida has been growing rapidly. But that’s not the world we live in anymore. Visitor volume is likely to decrease substantially in 2020 and may take years to return to 2019’s record high.

Moving forward, destinations will be fighting to maintain their share of a smaller pie of travelers. Florida will be starting from a position of strength – the highest share of domestic vacation travelers ever recorded (18.2%) in 20 years of measurement and an increasing share of overseas travelers.

The competition for market share will be fierce, but Florida has some natural advantages. The data below shows the kinds of destinations that travelers are planning to visit on their first post-COVID leisure trip. Florida has world-class offerings in each of the top five categories. It’s VISIT FLORIDA’s job to remind people of that.

**FLORIDA’S MARKET SHARE**

This chart tracks Florida’s share of the domestic vacation market and overseas visitation.

**DESIRED DESTINATION TYPE AFTER COVID-19**

This chart shows the percentage of domestic travelers who indicated the type of destination that they planned to visit on their first post-COVID leisure trip.

**HOTEL OCCUPANCY AND REVENUE**

2019: HOTEL ROOM DEMAND, ADR, AND REVPAR GO UP, UP, AND UP

Florida’s hotel industry saw another year of growth in 2019, as Room Demand, Average Daily Rate (ADR), and Revenue per Available Room (RevPAR) surpassed the historic benchmarks that were achieved in 2018.

Hotels in Florida sold 2.1 million more room-nights in 2019 than in 2018. Room supply expanded even more quickly than demand for a second consecutive year, bringing occupancy down 0.8% to 72.3%. At the end of 2019, supply had been expected to grow, with 42,000 new rooms scheduled to be added statewide by the end of 2021.

Financial indicators also showed improvement in 2019. ADR grew 1.1% to reach a historic benchmark of $145, while RevPAR rose 0.3% to reach a high of $105. When demand peaked in March at 11.7 million room-nights sold, ADR reached an annual high of $182. Despite strong annual growth, September saw year-over-year declines in ADR and Room Demand that were likely exacerbated by Hurricane Dorian.

And then came 2020.

**REVENUE PER AVAILABLE ROOM**

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

**OCCUPANCY RATES**

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

**AVERAGE DAILY ROOM RATE**

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

**2020 ROOM DEMAND**

This chart shows the year-over-year growth/decline of room-nights sold in Florida.

The new year started well for the hotel industry. The number of room-nights sold was up for the first nine weeks of the year. For perspective, visitor volume in 2019 reached a record 131.4-million visitors, and room demand increased by 1.8% year over year. Every week in the first part of 2020 surpassed that 1.8% growth rate.

The first case of COVID-19 in Florida was announced on March 1, and that week saw a modest decrease in rooms sold: down 6.1%. The next week in March, typically the best-performing week of the year, was down 22.1%. Nearly every week in March and April was down by more than 70%.

Between March 1 and May 30, total hotel revenue in the state was down nearly $3.5 billion year over year.

In the near future, economists say that ADR and RevPar will be slow to recover. Tourism Economics projects that, minus any further setbacks, the return to 2019 levels will take three years.
TOURISM’S POWERFUL ECONOMIC IMPACT
AFTER CATASTROPHIC LOSSES, NO CHOICE BUT TO REBUILD

The impact of tourism on Florida’s economy is undeniable. Visitors’ contribution to Florida’s Gross State Product (a measure of the size of the state’s economy) reached $91.3 billion in 2018—an increase of nearly 27% since 2013. Visitor spending supported more than 1.5 million jobs, which paid Floridians more than $54 billion in wages, and brought $12 billion in taxes into state and local coffers. And while 2019 numbers are not yet available, they almost certainly will be higher.

Bottom line: Florida was well on its way to achieving the 5-year strategic objective of $100 billion in tourism-related spend by 2020.

Tourism is also a global economic driver. According to the United Nations World Tourism Organization (UNWTO), international tourism contributed $1.7 trillion in 2018 revenues worldwide, making it the world’s third-largest export after oil and other chemicals. As recently as January 2020, the UNWTO was projecting that international travel would increase 3-4%, with Brexit being the biggest source of uncertainty.

But now COVID-19 has put this vital sector of the world’s economy in jeopardy. In its best-case scenario, UNWTO projects that 2020 international travel will decrease anywhere from 58% to 78%. As much as $1.2 trillion of the $1.7 trillion in export revenues will evaporate. Up to 120 million direct tourism industry jobs will be lost. Florida could be hit especially hard. While international visitors account for only 11% of Florida’s visitors, they make up 17.4% of visitor spending because they stay longer and spend more than domestic visitors. Projections by Rockport Analytics anticipated robust growth by international travelers over the next five years—now likely erased by the pandemic.

The COVID-enforced shutdown of Florida’s tourism industry already had outsized impacts in the first half of 2020. Between March 1 and May 30, Florida hotels lost nearly $3.5 billion in revenue compared to the same time frame in 2019. According to data released by the Florida Department of Economic Opportunity, nearly 40% of the hundreds of thousands of unemployment claims filed between March 15 and April 21 came from the tourism sector.

VISIT FLORIDA’s research indicates that until a vaccine is developed, consumer anxiety will inhibit travel, especially by air. Vacation experiences such as theme parks and restaurants and live events that previously thrived on crowds will require re-engineering. But the Florida vacation brand—the year-round weather, the sunshine, the natural beauty—remains desirable. So many lives depend on the Florida tourism economy. Reinvestment is the only path forward.

TOURISM’S IMPACT ON 2018 GDP
Indirect impacts are the measurable effects on non-tourism businesses that provide supplies to tourism businesses (e.g. restaurant suppliers). Induced impacts are the effects on non-tourism businesses due to spending of wages by employees of tourism businesses.
VISIT FLORIDA’S marketing strategy rests on an understanding of where Florida’s visitors come from, how they get here, and what they do here. For the ninth consecutive year, the collaborative efforts of the Florida tourism industry have delivered a new benchmark in visitation: in 2019, a record 131.4 million visitors – 89% of whom came from the United States.

Where did these visitors come from? Every state. But a closer look reveals that the top 10 origin states accounted for 57% of Florida’s 2019 visitors. Between 2018 and 2019, New York, Texas and Ohio each grew their share of Florida visits by more than 1 percentage point, while Georgia and Illinois each lost around 1 percentage point of their share.

How did these visitors get here? They drove, chiefly. But a greater share of Florida’s overnight domestic visitors traveled by air in 2019 – 36% compared to 34% – than in 2018. Those air travelers had more options to choose from: Available flights from the United States into Florida increased 4% between 2018 and 2019.

This increase in air travel may have driven the resurgence of visitation from New York City. After multiple years of no growth, visitation from New York City grew by 10.1%, or roughly 1.1 million more visitors.

Given COVID-19’s catastrophic impacts on the NYC area and air travel, that important origin market’s recovery will have much to say about Florida tourism’s recovery.

FLORIDA’S SUPER SIX MARKETS

Among metropolitan areas, New York City, Atlanta, Chicago, Philadelphia, Boston, and Washington, D.C., are the greatest contributors to Florida’s visitor numbers. These six DMAs (Designated Market Areas) account for nearly one-third of Florida’s domestic volume. Nine secondary markets, including two metros west of the Mississippi River, contribute 15.3% of Florida’s visitors.

### TOP 15 ORIGIN MARKETS

<table>
<thead>
<tr>
<th>ORIGIN MARKETS</th>
<th>SHARE OF FLORIDA’S DOMESTIC VISITORS</th>
<th>PP* CHANGE (2018-2019)</th>
<th>SHARE SHIFT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. New York, NY</td>
<td>9.4% 11.1%</td>
<td>1.7%</td>
<td>▲</td>
</tr>
<tr>
<td>2. Atlanta, GA</td>
<td>8.6% 6.2%</td>
<td>-2.4%</td>
<td>▼</td>
</tr>
<tr>
<td>3. Chicago, IL</td>
<td>3.6% 3.7%</td>
<td>0.1%</td>
<td>▲</td>
</tr>
<tr>
<td>4. Philadelphia, PA</td>
<td>3.7% 3.5%</td>
<td>-0.2%</td>
<td>▼</td>
</tr>
<tr>
<td>5. Boston, MA</td>
<td>2.5% 3.3%</td>
<td>0.8%</td>
<td>▲</td>
</tr>
<tr>
<td>6. Washington, DC</td>
<td>2.9% 2.8%</td>
<td>-0.1%</td>
<td>▼</td>
</tr>
<tr>
<td>7. Raleigh-Durham, NC</td>
<td>1.0% 2.2%</td>
<td>1.2%</td>
<td>▲</td>
</tr>
<tr>
<td>8. Detroit, MI</td>
<td>1.9% 2.0%</td>
<td>0.1%</td>
<td>▲</td>
</tr>
<tr>
<td>9. Cleveland-Akron, OH</td>
<td>1.0% 1.8%</td>
<td>0.8%</td>
<td>▲</td>
</tr>
<tr>
<td>10. Nashville, TN</td>
<td>2.7% 1.8%</td>
<td>-0.9%</td>
<td>▼</td>
</tr>
<tr>
<td>11. Dallas-Fort Worth, TX</td>
<td>2.1% 1.7%</td>
<td>-0.4%</td>
<td>▼</td>
</tr>
<tr>
<td>12. Houston, TX</td>
<td>1.1% 1.7%</td>
<td>0.6%</td>
<td>▲</td>
</tr>
<tr>
<td>13. Indianapolis, IN</td>
<td>1.3% 1.7%</td>
<td>0.4%</td>
<td>▲</td>
</tr>
<tr>
<td>14. Cincinnati, OH</td>
<td>1.3% 1.5%</td>
<td>0.2%</td>
<td>▲</td>
</tr>
<tr>
<td>15. Baltimore, MD</td>
<td>1.2% 1.4%</td>
<td>0.2%</td>
<td>▲</td>
</tr>
</tbody>
</table>

Source: D.K. Shifflet & Associates; *percentage point
DOMESTIC MARKETS TO WATCH

When Americans are ready to travel again, survey data suggest marketing opportunities if not advantages for Florida:

> Drive vacations will be favored over flying, and potential travelers have indicated they are willing to drive 700 miles to reach a destination.
> International travel will be shelved in the near term for regional travel. Potential visitors in origin markets with international airports could be looking for domestic vacation alternatives.
> Those potential travelers looking for vacation experiences that allow for social distancing have listed beaches as a first choice. Florida has 825 miles of beaches, plus a wealth of diverse outdoors experiences (more than 175 state and national parks, 700 freshwater springs, 1,250 golf courses, and two oceans of opportunities).

Here are some of the markets that are likely to have an outsized impact on visitation to the state in the years to come:

NEW YORK CITY
After three years of flat visitation, more than 1 million additional New Yorkers visited Florida in 2019. NYC continues to rank as the top origin market for all five of the audience segments that VISIT FLORIDA targets. Sadly, six months into 2020, New York also has borne the brunt of COVID-19 fatalities. Surveys have found that consumers concerned about the health safety of air travel are planning vacations by car rather than plane. As it happens, New York also is Florida’s No. 2 origin market for drive travelers.

ATLANTA
No. 1 drive market, No. 2 origin market overall – even with a slight decline in visitation in 2019. Yes, Atlanta has been a reliable source of Florida visitors for years.

But in this uncertain new world, road trips are king and tourism data suggests propelled up by younger travelers. Atlanta has the youngest average age of any of Florida’s top origin markets.

BOSTON
Among Florida’s top origin markets, only Boston’s visitor volume has not missed a beat in recent years. From 2016 to 2019, the number of Florida travelers has increased by 25%. But the COVID-19 pandemic’s impact on fly magnifies the data point that 60% of Bostonians get to Florida by air. And if New York City to Florida is a substantial drive, Boston is 200 miles farther away.

DALLAS-FORT WORTH
In 2019, nearly 60% of visitors from Dallas drove to Florida. Potential travelers planning their first post-COVID leisure trip say they are willing to drive roughly 700 miles to a vacation destination, the approximate distance from Dallas to Destin.

RALEIGH-DURHAM
Aside from a backward step in 2018, visitation from Raleigh-Durham has been rising in recent years. In 2019, the year-over-year increase in visitor volume was 50%. Nearly four of every five people coming to Florida from the Raleigh-Durham area get here by car.

BIRMINGHAM
Birmingham is close enough that one could hop in the car after breakfast and be lying on a Northwest Florida beach by lunchtime. And Birmingham travelers have been taking advantage of this proximity. The rate of visitation to Florida has increased by double digits in each of the past two years. Nearly a half-million more people came in 2019 compared to 2018. And not just to Northwest Florida. Both Tampa and Orlando are within a day’s drive.

FLORIDA’S TOP 10 DRIVE MARKETS

This chart shows the area within 686 miles of Destin, Orlando and Miami respectively.

DRIVE MARKETS TO THE RESCUE

Consumer surveys have consistently found that wary travelers are more comfortable taking road trips than flying at this time. In a survey fielded May 8-10, 2020, Destination Analysts found that 67.7% of respondents perceived airline travel as somewhat or very unsafe. In the same survey, 42% said they plan to drive on vacation in order to avoid airline travel.

Many destinations plan to focus their marketing efforts on “drive markets” – typically within a half-day drive. But “drive market” has a different meaning for Florida.

The table to the right shows Florida’s top 10 drive markets in 2019-2020, along with the distance from the starting location to the Florida state line. Two, maybe four of these 10 origin markets are close enough to reach the Florida border in a half-day. Does that mean trouble for the Florida tourism industry? Recent survey results and history would say no.

In the same survey by Destination Analysts, respondents said their first leisure trip would average up to 686 miles from home, or the exact distance from Nashville to Orlando. The map below shows portions of the United States within 686 miles of several Florida destinations.

Further, years of visitor data prove that driving distance means little when the destination is a Florida vacation. An estimated 7 million Canadians and New Yorkers were willing to drive to Florida in 2019.

<table>
<thead>
<tr>
<th>DRIVE MARKET</th>
<th>MILES FROM FL BORDER</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Atlanta</td>
<td>247</td>
</tr>
<tr>
<td>2. New York</td>
<td>903</td>
</tr>
<tr>
<td>3. Nashville</td>
<td>398</td>
</tr>
<tr>
<td>4. Chicago</td>
<td>867</td>
</tr>
<tr>
<td>5. Philadelphia</td>
<td>816</td>
</tr>
<tr>
<td>6. Washington, DC</td>
<td>676</td>
</tr>
<tr>
<td>7. Birmingham</td>
<td>208</td>
</tr>
<tr>
<td>8. Raleigh-Durham</td>
<td>424</td>
</tr>
<tr>
<td>9. Charlotte</td>
<td>353</td>
</tr>
<tr>
<td>10. Cincinnati</td>
<td>704</td>
</tr>
</tbody>
</table>

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

In 2019, Florida overindexed on family travel compared to the U.S. as a whole by 2 percentage points. That higher share is owed primarily to strong affinity for Florida among Affluent Families (35-54 years old; <$75K; kids in HH). Affluent Mature visitors (55 years or older; <$100K; no kids) also make up a larger share of visitors to Florida than the nation as a whole.

The good news here is that higher-income groups likely have the means to keep vacation as a priority, and Florida’s popularity among these cohorts could provide a cushion until the greater domestic market recovers.

There are two segments where Florida currently underindexes compared to the U.S. as a whole: Young & Free (18-34; any income) and Maturing & Free (35-54; any income). These two segments account for a third of all U.S. travelers, but COVID-19 could be the great equalizer and reset the behavior patterns of Florida’s historical visitor base.

First, the good news: Florida remains a renowned family travel destination. In 2019, vacationers with children in the household continued to give Florida a 2-percentage-point edge over the U.S. in terms of trip share.

Now the mixed news: After a historic investment from VISIT FLORIDA, family trips in 2017 and 2018 increased by 25%. The same visits declined by 10% in 2019 as our investment level fell and budget cuts restricted summer marketing. In 2019, vacationers with children in the household continued to give Florida a 2-percentage-point edge over the U.S. in terms of trip share.

Florida’s competitors will be keeping an eye on the growth potential of the family travel segment and investing in understanding their vacation desires will remain critical.

Significant questions remain about travel amid the COVID-19 pandemic. At its outset, Millennials and Generation Z appeared most willing to travel once the worst of the outbreak passed. But the subsequent economic crisis may hinder these generations’ ability to take a vacation, particularly when compared to older generations who may be more established in their careers and finances. Prior to the outbreak, Generation Z was expected to be a major consumer and traveling force, but disruptions during the early years of their careers could have long-lasting implications.

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The COVID-19 pandemic spawned global restrictions and economic turmoil that choked off travel in the first part of 2020. As the world awaits a vaccine and considers new travel protocols, the prognosis for Florida’s international markets is uncertain.

Remember that while international visitors represent only 11% of Florida’s visitor volume, their contribution is outsized because they typically stay longer and spend more than domestic visitors.

Florida has enjoyed modest increases in international visitor volume for two years running, but visitation to all international markets decreased 0.6% in 2019. America’s market share of world travelers also continued a decline – from 5.8% in 2017 to 5.4% in 2019.

Of Florida’s top 10 international markets, seven saw increases in Florida visitation in 2019 – the best international performance in several years.

In the next 12 months, we will continue marketing Florida to these countries – even at scaled-down levels. When the time is right, these travelers will know that Florida is the destination for their next vacation.

International Visitors in a Precarious Position

INTERNATIONAL VOLUME (in millions)
This chart shows the six-year trend of international visitation.

Canada remains the No. 1 international origin market for both Florida and America. Visitation to Florida rose by 2% in 2019 – the fourth consecutive annual increase – while Canadian vacations into the U.S. as a whole fell by 3.5%, according to the U.S. Travel Association.

Between 2013 and 2018, the U.S. lost 9% of its market share of Canadian outbound travel. The closing of the U.S.-Canada border to non-essential travel for months in 2020 certainly added to these headwinds.

Canada’s gross domestic product is expected to contract by 6.2% in 2020 as the world wrestles with the fallout of COVID-19. The Canadian dollar is the weakest it’s been since 2016.

On the bright side, despite the long distance between the two locations, VISIT FLORIDA estimates that about 41% of Canadian visitors to the state in 2019 got here by car, so Florida may be insulated from the shift away from flying.

Visits from the United Kingdom to Florida have remained relatively flat over the past three years. According to the U.S. Travel Association, U.K. residents took more trips to long-haul markets from 2015 to 2017, but travel to the U.S. decreased during that same time frame before rebounding slightly in 2018.

When those trends are considered in conjunction with Britain’s projected GDP decline of 6.5% in 2020, it becomes clear that Florida must maintain its place in the hearts and minds of U.K. travelers who, like those in many other countries, may begin to favor travel closer to home.

After suffering its worst recession in more than a century in 2015 and 2016, Brazil was expected to experience its greatest economic growth since 2012. COVID-19 has wiped out those gains, and Brazil is facing a GDP decline of 5.3% in 2020.

Colombia’s story is similar: optimistic outlook replaced by concern and reduced expectations. But compared to Brazil, Colombia’s forecast is less bleak: a GDP decline of 2.4%.

Mexico, America’s second-largest international origin market, is looking at an expected 6.6% decline in GDP for 2019. Since 2014, Florida’s share of Mexican visitors to America has averaged around 18%. The volume of Mexican travelers to Florida increased by 7% between 2018 and 2019, but COVID-19 has downgraded expectations.

In 2019, Germany saw its first increase in visits to Florida in several years. Now the German government expects the national economy to contract by 7.5%. It also should be included in any projection that 2020 is a national election year in America and German travelers tend to be more sensitive to political factors when choosing vacation destinations.
INTERNATIONAL MARKET SNAPSHOTS

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

CANADA

- The average trip value of a Canadian travel party visiting Florida is $1,985.
- Canadian visitors stay an average of 11.5 nights.
- Nearly half (49.4%) stayed in a private home during their visit.

UNITED KINGDOM

- The average trip value for a UK travel party is $2,449; for families, the value is $3,337.
- Visitors from the UK over the age of 50 tend to spend around $2,339 per trip.
- The average length of stay in Florida among Colombians is 11.4 nights.
- Over 60% of visitors from the UK visit Orlando.

COLOMBIA

- The average trip value of a Colombia travel party is $1,985.
- The average length of stay in Florida among Colombians is 11.5 nights.
- Nearly half (49.4%) stayed in a private home during their visit.

BRAZIL

- Brazilian travel parties on average have a trip value of $3,240, while families spend $6,341.
- Brazilian visitors stay an average of 11.4 nights.
- About three-quarters of visitors stayed in a hotel or motel.

MEXICO

- The average trip value of a Mexican air travel party is $1,760.
- The average length of stay in Florida among Mexican air visitors is 71 nights.
- Most visitors to Florida (71.7%) stayed in a hotel or motel.

GERMANY

- The average trip value for a German travel party is $2,248.
- German travelers stay an average of 11 nights and travel widely throughout the state.

INTERNATIONAL MARKETS TO WATCH

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

FLORIDA VISITORS

<table>
<thead>
<tr>
<th>Florida Market Share</th>
<th>Other States</th>
</tr>
</thead>
<tbody>
<tr>
<td>24.8M</td>
<td>56.1%</td>
</tr>
</tbody>
</table>

South America’s most stable and prosperous nation enjoyed years of economic growth until a decline in GDP in the first half of 2019. The pandemic is expected to drag the nation’s GDP down by 4.9% in 2020.

As a visa waiver country, Chilean travelers can enter the United States and access Florida via a direct flight into Miami. After reaching an apex in 2016 at 60.4%, Florida’s share of Chilean visits decreased to 51.6% in 2018, followed by another drop to 50.7% in 2019.

SNAPSHOT:
- The average trip value for a Chilean travel party to Florida is $2,500.
- Chilean travelers stay in Florida an average of 11.4 nights, and 74.4% stay in a hotel or motel.
- Chilean visitors tend to make their trip decisions a little over three months in advance. More than a third of Chilean visitors visit Florida from December through February - the height of their summer. 82.6% said the main purpose of their visit was a vacation/holiday.

SNAPSHOT:
- The average trip value for a French travel party to Florida is $2,098.
- French travelers stay in Florida an average of 9.2 nights. August and March are the most popular travel months. Decisions to travel tend to be made nearly four months in advance.
- 74.5% of French travelers visit Florida for a vacation/holiday.

Looking ahead, economic growth is expected to decline in 2020 by 7.2%.

FLORIDA VISITORS

<table>
<thead>
<tr>
<th>Florida Market Share</th>
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<tbody>
<tr>
<td>24.8M</td>
<td>14.2%</td>
</tr>
</tbody>
</table>

Florida’s share of French visitors bounced back from a five-year low of 13.9% in 2018 to 16.1% in 2019. This rebound should be monitored. Among the top outbound international tourism markets, France outpaced the world in terms of increases in expenditures in 2019, according to the UNWTO.

Snapshots: Florida’s share of French visitors bounced back from a five-year low of 13.9% in 2018 to 16.1% in 2019. This rebound should be monitored. Among the top outbound international tourism markets, France outpaced the world in terms of increases in expenditures in 2019, according to the UNWTO.

Looking ahead, economic growth is expected to decline in 2020 by 7.2%.
These charts show visits to the U.S. with Florida’s market share.

### Florida Market Share vs. Other States

#### SCANDINAVIAN COUNTRIES

<table>
<thead>
<tr>
<th>Year</th>
<th>Florida Share</th>
<th>Other States</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>21.2%</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>21.8%</td>
<td></td>
</tr>
<tr>
<td>2016</td>
<td>25.4%</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>23.7%</td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td>19.6%</td>
<td></td>
</tr>
<tr>
<td>2019</td>
<td>20.1%</td>
<td></td>
</tr>
</tbody>
</table>

SNAPSHOT:
- The average trip value for a Scandinavia travel party visiting Florida is $2,438.
- Scandinavian travelers stay an average of 10.1 nights.
- Scandinavian travelers make trip decisions about 4.5 months in advance and 46% use online travel agencies to plan their trips.
- Top destinations include Miami, Orlando, Fort Lauderdale, and the Florida Keys.

#### SPAIN

<table>
<thead>
<tr>
<th>Year</th>
<th>Florida Share</th>
<th>Other States</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>20.5%</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>24.4%</td>
<td></td>
</tr>
<tr>
<td>2016</td>
<td>27.5%</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>20.1%</td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td>20.7%</td>
<td></td>
</tr>
<tr>
<td>2019</td>
<td>23.1%</td>
<td></td>
</tr>
</tbody>
</table>

SNAPSHOT:
- The average trip value for a Spanish travel party visiting Florida is $1,233.
- Spaniards stay in Florida an average of 12.2 nights.
- 43% stay at a private home.
- 28.4% of visitors to Florida said the main purpose of their trip was to visit friends/relatives.

#### CHINA

<table>
<thead>
<tr>
<th>Year</th>
<th>Florida Share</th>
<th>Other States</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>12.2%</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>6.0%</td>
<td></td>
</tr>
<tr>
<td>2016</td>
<td>7.0%</td>
<td></td>
</tr>
<tr>
<td>2017</td>
<td>5.3%</td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td>6.0%</td>
<td></td>
</tr>
<tr>
<td>2019</td>
<td>5.6%</td>
<td></td>
</tr>
</tbody>
</table>

SNAPSHOT:
- The average trip value for a Chinese travel party is $3,407.
- Chinese travelers stay in Florida an average of 19.6 nights.
- Nearly a quarter of Chinese visitors (24%) come to Florida to visit friends or relatives.

After a nearly 7% decline between 2016 and 2017, Florida’s share of Spanish 2018 vacationers stabilized at 20.7%, then grew to 23.1% in 2019.

Spain entered the first half of 2020 in a fairly strong economic position, but pandemic-related fallouts have Spain facing a GDP reduction this year of 8%.

The Chinese tourism market continues to mature with increases in independent travelers — those who plan a vacation without the help of a tour operator. This bodes well for Florida, as it is not included in many mainstream package tour itineraries. Also, at the time of this report, there are no direct flights into the state — meaning that travelers must be comfortable with slightly more complicated flight plans.

Since 2015, Florida has maintained a small but stable slice of the nearly 3 million Chinese visitors coming to the U.S.

While China appears poised to be one of the first countries to return to normalcy after its bout with COVID-19, the global fallout of the pandemic has resulted in an expected GDP growth rate of just 1.2% in 2020; the nation’s slowest growth rate since the 1970s.

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Florida’s share of Scandinavian visits to the U.S. rebounded slightly in 2019 after reaching a low point the prior year. Prior to the COVID-19 outbreak, Scandinavian countries were ground zero for the trend of “flight shaming,” a Swedish-born movement to reduce air travel and its environmental impact. It remains to be seen if this trend will carry forward into a post-pandemic world of pent-up travel demand.

Each of the four countries that make up Scandinavia (Denmark, Finland, Norway, and Sweden) is expected to see sharp declines in GDP in 2020: 6% in Finland, 6.8% in Sweden, 6.5% in Denmark, and 6.3% in Norway.

Until 2020, the Florida tourism industry approached India and China as puzzles worth solving: Could we overcome the distance and travel time and claim a share of two increasingly mobile nations that account for more than a third of the world’s population?

Our marketing in India and China now pauses indefinitely as we evaluate post-COVID travel conditions and invest more in historically reliable origin markets.

At this moment, Florida’s share of Indian visitors to the United States has hovered between 8% and 9% since 2014.

SNAPSHOT:
- The average value for an Indian travel party to Florida is $1,145; nearly a third stay at a private home during their trip.
- Indian travelers stay in Florida an average of 17.0 nights and 71% travel alone.

The Chinese tourism market continues to mature with increases in independent travelers — those who plan a vacation without the help of a tour operator. This bodes well for Florida, as it is not included in many mainstream package tour itineraries. Also, at the time of this report, there are no direct flights into the state — meaning that travelers must be comfortable with slightly more complicated flight plans.

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Insights & Considerations

WE WILL PREVAIL

The Florida tourism industry is always forward-thinking about crisis management, regularly reviewing and updating its response strategies. But this public health catastrophe has humbled us and reversed years of progress:

- Through May, Florida’s unemployment rate was approaching 25 percent. In the hospitality sector, 520,000 Floridians had lost jobs.
- In just three months, hotels had lost $3.5 billion in revenues.
- Nine consecutive years of record visitation had come to a crashing halt.

Be while we are staggered by the economic and human toll, we will prevail.

As destination stewards and promoters, this crisis also inspires us to act because tourism can play such an important role in making Florida whole again. And just as we have responded to the Deepwater Horizon oil spill, the Great Recession, and multiple hurricanes, VISIT FLORIDA and its statewide partners are ready to lead Florida’s tourism sector through the most significant economic recovery this state has undertaken.

Here are six insights that will inform our mission.

1. THE SAFE OUTDOORS

In this uncertain public health moment, one scientific consensus is an endorsement for Florida tourism: Outdoor activities plus year-round sunshine plus smart social distancing equal a nearly risk-free vacation experience. Florida’s great outdoors are the safe outdoors.

Potential travelers looking for reassurance can locate peace of mind and family fun on 825 miles of beaches, in 700 freshwater springs, on the trail in 200-plus state and national parks and forests, at 1,250 golf courses, and fishing, boating, surfing, paddling, and diving in two oceans.

Even the most populated outdoor activities – world-class attractions such as Disney, Universal, SeaWorld, and LEGOLAND – will include aggressive new protocols to ensure customer safety. Away from the population centers, Florida’s less crowded rural destinations and experiences more than ever have a compelling pitch to make to visitors.

But with the opportunity comes a challenge: Can the smaller tourism partners manage a memorable and safe vacation experience that inspires visitors to come back and residents to want their return?

2. VIRTUAL TRAVEL: SAFE IN THE SHORT TERM, SMART GOING FORWARD

As with any crisis, the question is how will we learn and adapt to come out smarter and better on the other side?

The pandemic has institutionalized new protocols that will help address traveler anxiety and ensure customer loyalty: temperature checks, self-service kiosks, and social distancing monitors among them.

This crisis also has inspired marketers to innovate to keep their destinations top of mind among global audiences anxious to get away but stuck at home.

Say hello to the Virtual Vacation.


For tourists unsure of what to expect from travel in a post-COVID world, famous attractions and museums, national monuments and rural destinations are leaning on virtual experiences to keep potential visitors in the dreaming state and rehearsing their next vacations.

But while the pandemic has elevated the profile of VR tools out of necessity, the benefits for destinations and attractions will outlive this moment:

- Audience expansion beyond core bases;
- Increased geographic footprint;
- Create engagement/re-engagement opportunities with previous visitors;
- Any size organization can provide high-quality virtual experiences;
- The risk for experimentation and creativity is low. If things don’t work, try something else.
3. Voluntourism and the Gen Z Traveler

At the start of 2020, the oldest members of Gen Z (born between 1996 and 2010) transitioned into adulthood. And what promise they brought:

- > 40% of the world’s purchasing power;
- > 65% of them ranking travel as their most important expenditure;
- > The most racially diverse generation and on their way to being the best-educated.

And they were coming of age at a time of record-low unemployment and a strong economy.

Then came COVID-19. Instead of looking ahead to a world of opportunities, Gen Z now peers into an uncertain future. These young people have been affected disproportionately by layoffs: Of the 19.3 million workers ages 18-24, nearly half are employed in the service sector, according to Pew Research. As a whole, Gen Z adults currently occupy one-quarter of these at-risk jobs.

And despite this grim forecast, there is an opportunity for tourism marketers to appeal to Gen Z travelers’ world view over their wallet.

A defining behavior of Gen Z is activism, their concern for improving the world. Local DMOs who haven’t done so should expand beyond typical tourism experiences and partner with local not-for-profits to create accessible (vacation-sized) volunteer experiences that offer Gen Z travelers the ability to have fun while making a difference.

The data make the case for this strategic approach:

- > 26% of Gen Z already volunteer;
- > 69% of Gen Z respondents in a Booking.com survey said it is important to them to give back to the local community when traveling.

4. International Markets of Opportunity

The uncertain timeline for U.S. border openings, long-haul flight access, and traveler confidence could curtail international tourism through 2020, but Canada and Mexico remain strong bets to lead a Florida rebound. Here’s why:

> Access. Florida is a fly or drive destination. Mexico to Miami and Toronto to Orlando are roughly three hours by air or just over 20 hours in the car.

> Desirability. Despite an inconsistent marketing presence for several years in both countries, Florida remains a favored vacation destination. When VISIT FLORIDA enhanced its marketing efforts in Canada and Mexico beginning in 2017, visitor volume grew by 3.9% and 14.5% respectively.

> Decreased Competition. In recent years, Canadians have gravitated to new and exotic destinations. Limited access, higher airfares, and concern around public health safety will likely return their attention to Florida, a reliable destination for generations of Canadian travelers. In Mexico, Florida’s top destination competitors will be working with reduced budgets and will be challenged to adapt their main selling points in a post-COVID world.

> Untapped Potential. Florida currently captures roughly 20% of all Mexican air travelers to the United States, 21.3% of all Canadian visitors. The facts shared above and the market conditions make the case: There is room for growth.

International travel will need time to recover. Borders must open, airlift must be available and affordable, and travelers must have confidence in their safety. But when that time comes, Canada and Mexico can help lead Florida’s turnaround, increasing visitation and market share in the long term.

5. The Culture Gap

In the Sunshine State, where Florida’s beaches and theme parks are the brightest stars, cultural activities are an under-promoted treasure.

According to the state Division of Cultural Affairs, more than 65% of Florida visitors take part in at least one culturally-based activity. Across America within the past decade, cultural travel has been on the rise. In 2019, one of five U.S. travelers took a trip to explore historic sites, museums, cultural spaces, and art galleries. In Florida, that number was closer to one in 10.

So there is room to grow.

VISIT FLORIDA began marketing cultural activities in earnest to the Experience Seeker traveler in Fall 2018. Results from two campaign cycles are promising; Travel by this segment to Florida grew more than 20% in two years. Also, as a targeted audience segment, Experience Seekers went from making up 21% of Florida travelers in 2017 to 26% in 2019.


The data are hopeful. More than two-thirds of American travelers intend to take a trip in the next six months. And Florida remains the destination of choice.

Even in the face of global tourism’s greatest crisis, the Florida vacation product can be counted on to rally the economy. But what our industry does in these early days will matter greatly.

The major theme parks, always among the vanguard for customer service, are out front leading the reimagination with new protocols. Travelers will be looking for a good time and a safe time. They will expect destinations and businesses to prioritize public health, ideally implementing these new procedures with as little imposition as possible.

Our competitors will be working hard to seize the high ground with their message.

More than ever, VISIT FLORIDA and its partners must speak and act with a unified voice. Nothing else works without travelers’ faith in our messaging, our destinations, and our follow-through on this promise.
HITTING THE MARK

In spite of multiple challenges the past few years, VISIT FLORIDA has sustained record performances, received accolades in AdWeek and won Expedia EPIC and Emmy awards, and achieved the highest domestic market share from the past 20 years.

We have excelled because we embrace change. We know that the only way to remain competitive is by being nimble, strategic, and resilient. This perseverance, inspired by industry support, is the beating heart of VISIT FLORIDA.

The coming year will be about minimizing the gap between what could have been and what is, about growing market share when the opportunity arises, and about making decisions that ignite Florida’s economic recovery and make our industry proud.

As a mature destination hosting 131.4 million non-resident visitors a year, Florida attracts travelers from a wide variety of consumer segments and geographic origins. Understanding and effectively communicating with these consumers, based on their individual preferences, is critical to Florida’s continued success as a tourism destination.

In a world still living with a pandemic, global market conditions are dynamic. Our strategies must be target-precise and also flexible enough to pivot. Some origin markets will become more important and some will be paused.

Our success is made more likely by aligning the goals and efforts of Florida’s tourism industry. The power of a united travel industry is undeniable and more important than ever.

IN THIS SECTION
Hitting the Mark 33
COVID-19 Strategy 33
Marketing Approach 34
Marketing Tactics 36

COVID-19 REBOUND STRATEGY

In bold text on the left are the phases. The smaller texts underneath them represent a generalized traveler mindset. The boxes to the right are VISIT FLORIDA’s responses during those phases.
MARKETING APPROACH

For planning purposes, below is a high-level overview of VISIT FLORIDA’s FY20-21 market approach continuing through the 2021 calendar year. This plan and the tactics that follow are subject to change based on VISIT FLORIDA’s FY20-21 level of funding, strategic initiatives, public health status, and destination accessibility.

WINTER VISITOR PROFILE

LENGTH OF STAY
This chart shows the number of nights winter visitors stay.

<table>
<thead>
<tr>
<th>LENGTH OF STAY</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
</tr>
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<tbody>
<tr>
<td>1-3 nights</td>
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<td>4.5</td>
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<td>4.7</td>
<td></td>
</tr>
<tr>
<td>4-7 nights</td>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
<tr>
<td>8+ nights</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Avg. Length of Stay in Nights</td>
<td>4.7</td>
<td></td>
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</tr>
</tbody>
</table>

AGE OF TRAVELER

18-24 | 25-34 | 35-44 | 45-54 | 55+
12%   | 21%   | 15%   | 16%   | 35%

TIME TO PLAN TRIP

3 weeks or less | 1 month | 2-3 months | 4-5 months | 6 months | More than 6 months
11% | 12% | 34% | 11% | 11% | 20%

SEASONALITY

WINTER | SPRING | SUMMER | FALL
20% | 27% | 35% | 18%

TRANSPORTATION MODE

Airplane | Non-Air
24% | 76%

LODGING TYPE

Paid Accommodation | Hotel | Non-Hotel | Non-Paid Accommodation
62% | 39% | 23% | 38%

HOUSEHOLDS W/ CHILDREN IN THE FOLLOWING AGE RANGES

Less than 2 years | 2 - 5 years | 6 - 12 years | 13 - 17 years
6% | 30% | 44% | 37%

AGE OF PARENT

18 - 34 years old | 35 - 49 years old | 50 - 64 years old | 65+ years old
28% | 45% | 17% | 9%

IMPULSE GETAWAY PROFILE

SEASONALITY

Florida | All U.S.
24% | 32%

TRIP PLANNING TIME FRAME

+1 month | 1-2 months | 3-6 months | 8+ months
35% | 24% | 20% | 23%

ADVENTURE SEEKERS’ TOP FLORIDA ACTIVITIES

Beach | Shopping | Fishing | Fine Dining | State Park/Monuments/Recreation | Scuba Diving/Snorkeling | Wildlife Viewing | Visiting Relatives | Urban Sightseeing | Hiking/Backpacking/Canyoning
48% | 35% | 32% | 27% | 22% | 20% | 20% | 28% | 17% | 16%

EXPERIENCE SEEKERS’ TOP FLORIDA ACTIVITIES

Beach | Shopping | Fishing | Fine Dining | State Park/Monuments/Recreation | Scuba Diving/Snorkeling | Wildlife Viewing | Visiting Relatives | Urban Sightseeing | Hiking/Backpacking/Canyoning
48% | 35% | 32% | 27% | 22% | 20% | 20% | 28% | 17% | 16%

Note: VISIT FLORIDA’s fiscal year begins in July and ends in June the following calendar year. Dashed lines represent campaigns that continue throughout the year.
MARKETING TACTICS

STRATEGY 1
DRIVE DEMAND

- Execute and optimize COVID-19 rebound campaigns
- Build and sustain relations with global media and social influencers
- Develop and sustain marketing partnerships that increase reach and relevance
- Create co-op programs aligned with VISIT FLORIDA’s overarching marketing objectives
- Maintain ongoing search presence (SEO/SEM)
- Leverage VISIT FLORIDA content for domestic marketing campaigns and international marketing efforts
- Align collaborative pitching with press visits and media relations
- Collaborate with DMO partners to pitch stories and host media visits that yield a larger awareness footprint to the state
- Create influencer campaigns to reach social communities in order to promote awareness, engagement and advocacy
- Leverage best-in-class partnerships to extend the Florida Meetings message through larger channels
- Coordinate promotions in key global markets to maintain high-level Florida brand awareness

STRATEGY 2
INCREASE YIELD

- Create integrated campaigns in top international markets
- Promote educational programming for travel trade
- Steward relationships with top international trade and consumer media
- Develop and maintain relationships with tour operators and travel agents in key international markets
- Coordinate international trade events throughout the year for key markets
- Develop and distribute content promoting lesser known destinations and experiences
- Build relationships with influential global product managers and receptive operators
- Coordinate promotions featuring unique experiences, less traveled destinations and multi-destination prize packages
- Leverage expertise of Welcome Center staff to educate and serve Florida visitors

STRATEGY 3
BRAND ENGAGEMENT

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

STRATEGY 4
INDUSTRY ALIGNMENT

- Engage with and educate Partners through marketing consultations and sales calls
- Continually promote VISIT FLORIDA programs and partnership opportunities through social channels, direct mail campaigns and in-person events
- Enhance Partner benefits platform to provide more exclusive opportunities for VISIT FLORIDA Marketing Partners
- Develop programs and webinars that deliver education/thought leadership to the industry
- Invest in developing tools and resources that drive Partner retention and demonstrate value of participation
- Increase the value of co-op to Partners by developing year-round, audience-specific, non-traditional and bundled packages
- Create, manage and distribute corporate messaging to improve alignment with the Florida Tourism Industry
- Manage all crisis communication efforts and provide industry direction and support as needed
- Facilitate international co-op opportunities for Partners, leveraging the Florida Brand
- Create unique and non-traditional Partner opportunities at little to no cost
THE OFFICIAL TOURISM MARKETING CORPORATION FOR THE STATE OF FLORIDA

Kennedy Space Center

VISITFLORIDA®