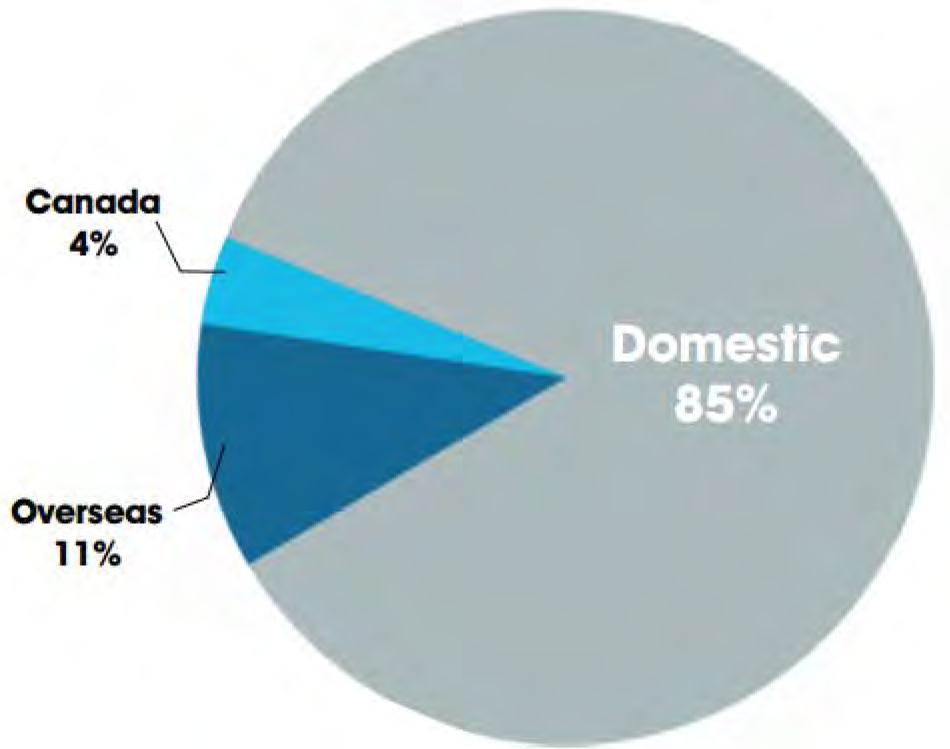

VISITFLORIDA.
INTERNTIONAL MARKETS
UNITED KINGDOM
GERMANY
CANADA

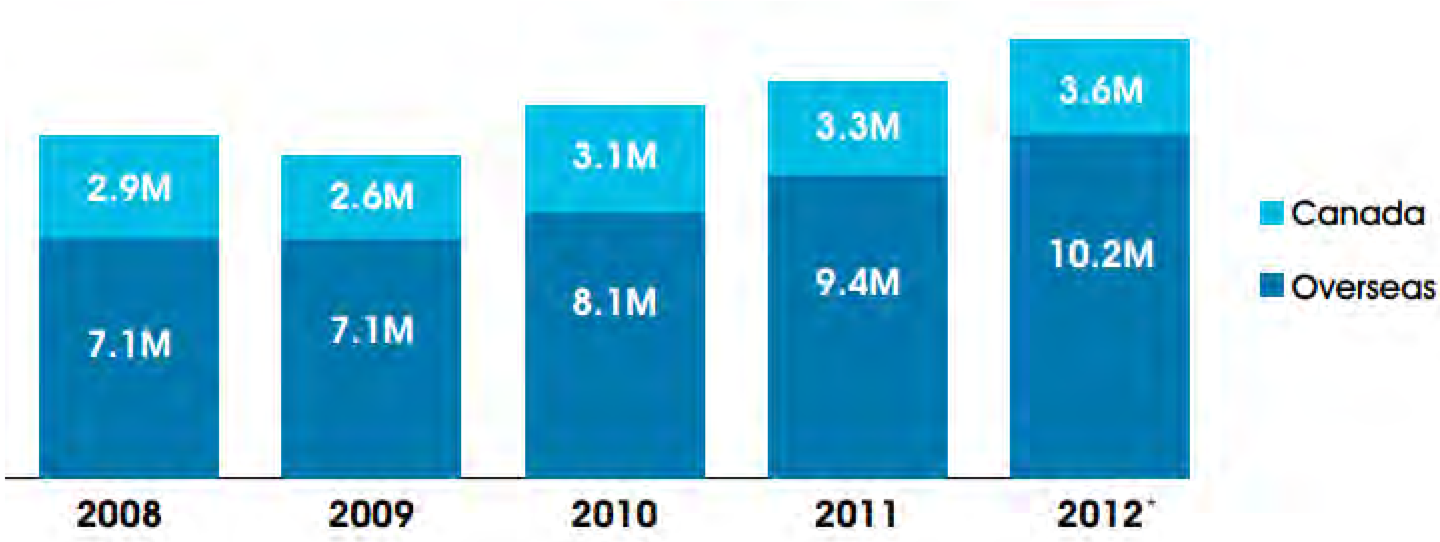
INTERNATIONAL VISITOR VOLUME

- 13,927,000 – 10% increase over 2011

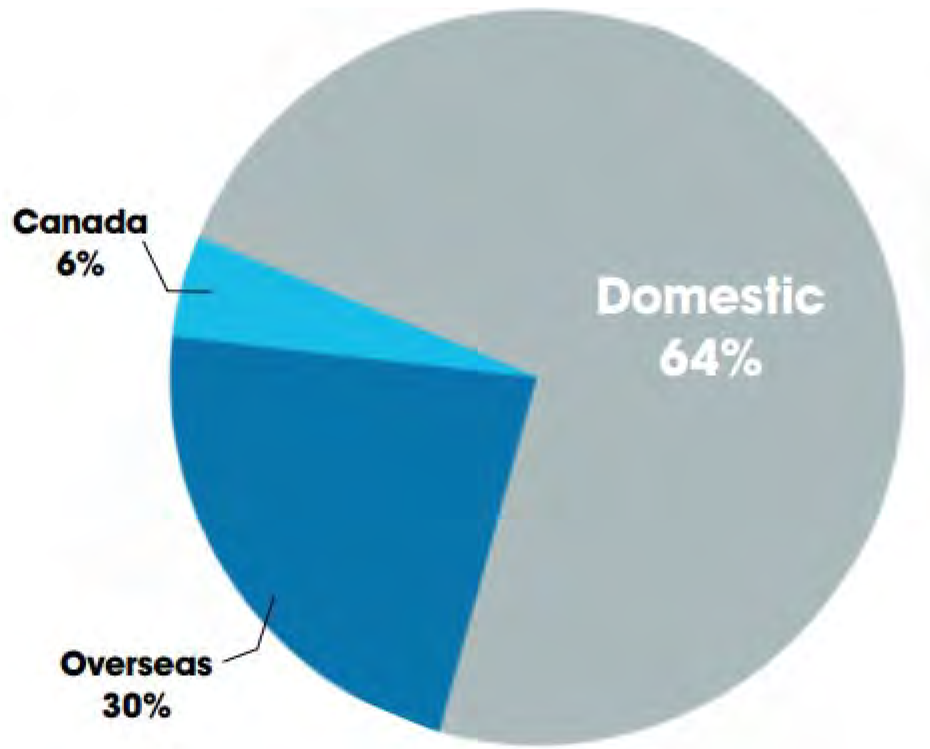


VISITOR VOLUME TREND

- 5 year Canada growth: 45%, overseas - 24%

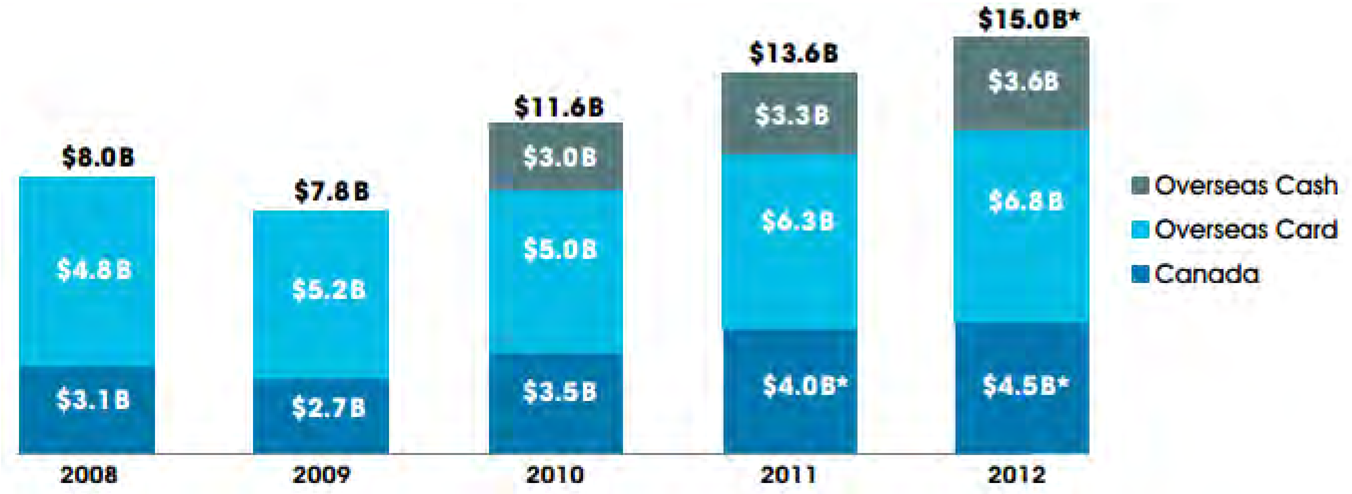


INTERNATIONAL VISITOR SPEND

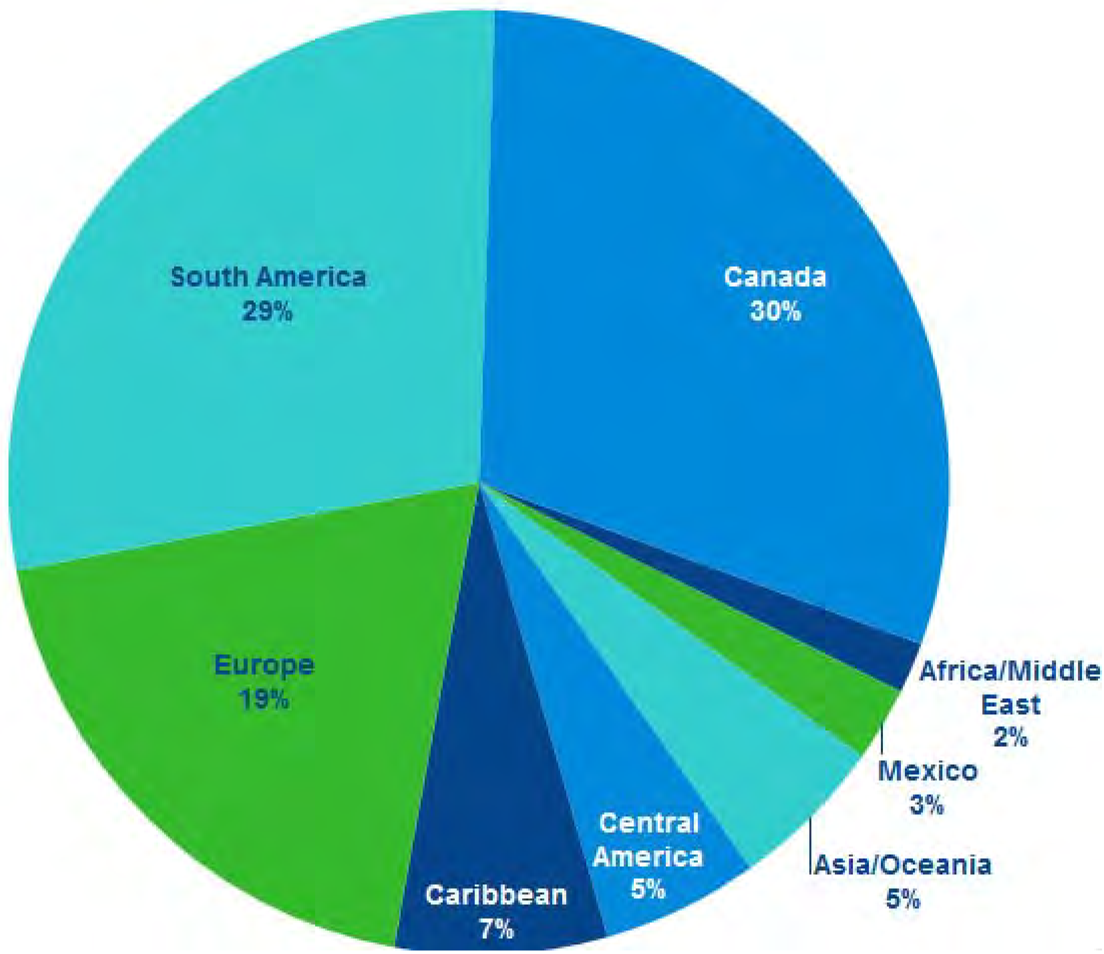


VISITOR VOLUME SPEND

- 5 year Canada growth: 44%; overseas – 42%



INTERNATIONAL SPENDING IN FLORIDA BY REGION



INTERNATIONAL REPRESENTATION

United Kindgom

Airlift to Florida:
The Current and Upcoming Season

Carrier	Route	Frequency	Aircraft
British Airways	LGW-MCO LGW-TPA LHR-MIA	13/week 7/week 2/day	777 777 777/747
American Airlines	LHR-MIA	2/day	777
Virgin Atlantic	LGW-MCO MAN-MCO LHR-MIA GLA-MCO	2/day 2/day 7/week summer	747/Airbus 747 747 Airbus
Aer Lingus	DUB-MCO	3/week	Airbus

BA is increasing their LGW MCO flying from 10 to 13 flights a week next summer and Virgin going double daily on MAN MCO in the summer adding another 30,000 seats.

United Kingdom

Airlift to Florida:
The Current and Upcoming Season

To Florida - Charter

Capacity: >120,000 seats/year, up by 20,000

Carriers: Thomas Cook, TUI and Monarch.

Thomas Cook have moved to Orlando International looking to reduce capacity by 4%, however Monarch looking to increase by 45% from 25,000 to 40,000 seats in 2014.

To Competitive Destinations

Main competitor: Western Europe

Our main competitor Western Europe continues to see good growth from low cost airlines such as EasyJet and Ryanair to the European hotspots of Spain, the Balearics, Turkey and Greece.

United Kingdom

COMPETITIVE LANDSCAPE

TOP COMPETITORS: SPAIN, FRANCE, TURKEY, ITALY, GREECE

LONG-HAUL COMPETITORS:
CALIFORNIA, CARIBBEAN, MEXICO, UNITED ARAB EMIRATES

ADVERTISING SPEND:

	Total	**Media**
California	£2.5m	TV (£1.7m), Newspapers* (£0.5m), Outdoor (£0.25m)
Turkey	£1.9m	Outdoor (£0.5mln), TV (£0.5m), Newspapers* (£0.5m)
Spain	£1.5m	Internet (£0.8m), Newspapers* (£0.7m), TV (£50,000)
France	£0.8m	Newspapers* (£0.4m), Cinema (£0.3m), Magazines
Mexico	£0.3m	Newspapers* (0.1m), Outdoor (0.1m), Magazines

(Period: July ‘12 – June ‘13) ** National and regional*

IMPLICATIONS: Focus on Florida’s strengths and USPs in positioning the brand

United Kingdom

CONSUMER PROFILE

TARGET AUDIENCE - DEMOGRAPHICS

- Small groups – 2 or more families travelling together
- Millennials (born 1980s to mid 90s)
- Digital Natives (Millennials that are early adopters of online development)
- Digital Immigrants (older generation comfortable and at ease with using technology)
- Over 50s (growing population)

  willing to spend considerable amounts, mostly young, from all backgrounds, once in a lifetime experience.
- Families – growing Yummy Mummy market, multigenerational holidays

United Kingdom

CONSUMER PROFILE

INTERNET AND SOCIAL MEDIA

80% of UK households now have internet access (2012)
65% of the UK online population use Facebook
50% of the UK online population use YouTube
UK is the fourth largest country for twitter users in the world (10 million)

Most popular social networking websites

- Facebook
- Twitter
- YouTube
- Linkedin

Consumer Profile

TRENDS

There will be increased collaboration between consumers – Groupon and people collaborating together to buy online.

ABTA's latest state of the nation report shows massive increase in spending from 20-25 year olds (Generation Y), due to living with parents and having a large disposable income

Big proliferation of European travel bloggers

These statistics make online distribution and social media an important platform

Low cost ways to reach some elements are; social media, PR, Online…

United Kingdom

CONSUMER PROFILE

TRANSACTION PATTERNS

According to the UK Office for National Statistics (ONS), in the 12 months to September 2012, approximately 38 million people took a holiday (an increase of 1% year on year), of which it is estimated 15 million were booked as packages.

Focus on value for money rather than the cheapest price, suggests people are thinking carefully about what they want and being more discerning about their holidays.

Figures from the ABTA Consumer Trends survey showed that in the 12 months to September 2012, 61% of Brits took a foreign holiday with a third taking more than one trip abroad.

CONSUMER PROFILE

TRADE VS DIRECT PURCHASE

Travel agents and tour operators were responsible for more than 50% of bookings in 2012.

OTHER CHARACTERISTICS

Bookings continue to hold up through retail channels. Consumers feel better protected going through a travel agency.

Booking period: year-round

One in five consumers is so keen on their foreign breaks that they regard a longer trip overseas as a necessity they couldn’t do without.

TRAVEL PEAKS AND OTHER TIMING OPPORTUNITIES

The majority of Brit’s travel to Florida March, April, May, July, August and October.

Couples and older travelers will go in the off peaks in winter and shoulder seasons

OPTIMUM DISTRIBUTION CHANNELS

Co-op advertising with major partners such as airlines, tour operators, car rental and attractions

Social media

Promotions

United Kingdom

Germany

Airlift to Florida:
The Current and Upcoming Season

Carrier	Destination	Frequency	Aircraft	Capacity
Lufthansa	FRA-MIA FRA-MCO	daily daily	A380-800 B744	526 352
Condor	FRA-FLL	3/week (only in summer May 11- Oct 12, 2014)	Boeing 767-300	270
Air Berlin	TXL-MIA DUS-MIA DUS-RSW	5/week daily 4/week	A330-200 A330-200 A330-200	300 300 300
Swiss	ZRH-MIA	10/week	A330-300	236
Edelweiss	ZRH-TPA	Fridays year-round Tuesdays Mar4 – Apr29	A330-300	332

Germany

Airlift to Florida:
The Current and Upcoming Season

To Competitive Destinations

Competitor: California / Western USA
Number of connections is stable, nonstop service from national carriers Lufthansa and Swiss several times a day.

Competitor: The Caribbean
Charter market. High presence of Condor.

Competitor: Thailand
Stable situation, nonstop service from national carriers Lufthansa, Swiss and Austrian, flights are up, price-driven due to Arabian hubs.

Competitor: UAE
Increasing service, stop-over traffic.

Competitor: Maldives
Stable, DINKs, high-end market, air service with Air Berlin and Condor.

Germany

COMPETITIVE LANDSCAPE

Top Competitors:

California, Caribbean, Thailand, United Arab Emirates, Canary Islands, Maldives

Advertising Spend

Advertising campaigns, stand-alone sales missions, huge trade/consumer show presence, promotion weeks (e.g. www.summerisdubai.com).

Implications

Focus on Florida’s strengths and USPs in positioning the brand.

Consumer Profile

Target Audience - Demographics

Families

Average age of 35-55 years, up to three children, safety of the travel destination is important, family- and child-friendly policies evident, interested in smooth and uncomplicated travel.

Independent tourists – DINKS

Well-educated, 30-50 years, average to high income levels, high travel propensity, range of activities wanted, multi-faceted holiday focus on natural beauty, unique experiences, dining and relaxation.

Newlyweds and honeymooners

Willing to spend considerable amounts, 25-40 years, from all backgrounds, once in a lifetime experience.

Consumer Profile

MEDIA CONSUMPTION – ONLINE (GERMANY)

- Internet access: 76 % (doubled since 2001)
- Average 133 minutes/day
- Significant growth among the older population: +50 = 84% / +70 = 175%
- In 2013, 55% informed themselves on travel options via Internet.

SOCIAL MEDIA

- Top three frequented websites: Google, Facebook, YouTube
- 30% using Facebook = about 26 million persons
- Twitter users doubled in 2012
- YouTube: 4 billion visits per month (worldwide) German stats NA
- Leading ranking communities: Tripadvisor, Holidaycheck, Qype
- 58% consult ranking sites, 28% use social media for travel information
- Instagram growing quickly, particularly among young users
- 26% consulted professional travel blogs in 2013

Consumer Profile

TRANSACTION PATTERNS

Record spending on holidays: more than € 63 billion for holiday trips and more than € 20 billion for short holidays

Holiday travel propensity is stable on a high level: 76%

Sun & beach holiday most important, followed by family holidays and holidays to relax: 41 million persons in Germany would like to go on a sun & beach holiday in the next three years

Rather more culture light than more pure culture

German-speaking consumers see travel as a priority. They are large spenders and like to ensure that their travel plans meet their expectations

Main booking period is Jan. – Mar.

Main travel period is Jul. and Aug.

Source: FUR Reiseanalyse 2013

Germany

Consumer Profile

Trade vs Direct Purchase

Travel agencies still dominate the German market with 34%. Bookings through traditional retail channels remain strong in particular for long-haul travel.

Other Characteristics

The number of German travel agencies is less than 10,000 for the first time, however, in 2012 this booking channel made record sales of € 22.5 billion.

Travel peaks and other timing opportunities

Main holiday period in Germany is July to mid-September.

> Low season in Florida

Germany

Optimum Distribution Channels

The top five booking channels – ordered by priority

1. Travel agencies: 34%
2. Accommodation direct: 29%
3. Online travel agencies: 15%
4. Transportation direct: 14%
5. Tour operator direct: 7%

(Source: FUR Reiseanalyse 2013)

Most long-haul trips (59%) are booked as package holidays or as modular packages at a travel agency.

Germany

Optimum Distribution Channels

Best Way to Reach this Target

Travel agency or Internet? The answer is both. The segment of travelers that research online and purchase offline via travel agents and tour operators remains relatively stable at around 30% and is expected to stay that way throughout 2015. (Source: Bitkom)

- Trade trainings
- Co-operations with tourism and non-tourism partners
- Online presence via social media, banner advertisements, online marketing
- Cross medial PR approach

Is there any low cost way to reach the target?

Create / use synergies, e.g. Cross Media Campaigns, co-operate with tour operators and non-tourism companies to stretch the budget.

GREATEST FLORIDA APPEAL TO THE TARGET?

Weather: sunny and warm climate year-round

Diversity: beaches, theme-parks, nature, great cities, activities (golf, water sports), shopping

Ease of access and travel: airline connections, infrastructure, politically stable, good exposure in tour operator programs

WHY?

Weather: long cold winters and instable summers in Germany

Diversity: appropriate for everyone, experiences, ideal combination of relaxation and activity options

Germany

CANADA

AIRLIFT TO FLORIDA

Carrier	Origin	Destination
American Airlines	Montreal-PET, QC, CA Toronto, ON, CA	Miami, FL Miami, FL
Air Canada	Halifax, NS, CA Ottawa, ON, CA Montreal-PET, QC, CA Toronto, QC, CA	Fort Lauderdale, Orlando, Tampa, FL Fort Lauderdale & Tampa, FL Fort Lauderdale, Orlando, West Palm Beach, Fort Myers, Tampa, FL Fort Lauderdale, Orlando, Miami, West Palm Beach, Fort Myers, Sarasota/ Bradenton, & Tampa, FL
Air Transat	Quebec, QC, CA Montreal-PET, CA	Fort Lauderdale & Orlando, FL Fort Lauderdale & Orlando, FL
Sunwing Airlines	Halifax, NC, CA Ottawa, ON, CA Quebec, QC, CA Montreal-PET, QC, CA Toronto, ON, CA	Orlando, FL Orlando, FL Fort Lauderdale, FL Fort Lauderdale, FL Fort Lauderdale, Orlando, St. Petersburg, FL
WestJet	Edmonton, AB, CA Hamilton, ON, CA Halifax, NC, CA Ottawa, ON, CA Quebec, QC, CA Moncton, NB, CA Montreal-PET, QC, CA Winnipeg, MB, CA London, ON, CA Calgary, AB, CA St. Johns, NL, CA Toronto, ON, CA	Orlando, FL Orlando, FL Fort Lauderdale, Orlando & Tampa, FL Fort Lauderdale, Orlando, Fort Myers & Tampa, FL Fort Lauderdale, FL Orlando, FL Fort Lauderdale & Orlando, FL Orlando, FL Orlando, FL Orlando & Miami, FL Orlando, FL Fort Lauderdale, Miami, Fort Myers and Tampa, FL

CANADA

Canadian Direct Air Arrivals to FL

Destination	YTD	2009	2010	2011	2012	2013	2013 vs. 2012	CARG*
Orlando	August	270,509	274,838	311,488	332,918	346,615	4.1%	5.2%
Sarasota	August	8,738	9,472	11,365	11,341	11,590	2.2%	8.4%
Tampa	August	72,110	85,416	81,877	84,816	90,971	7.3%	3.0%
Miami	August	206,703	247,875	257,496	262,171	278,152	6.1%	5.5%
Fort Myers	August	35,316	41,867	53,150	62,117	68,537	10.3%	14.4%
Palm Beach	August	12,872	13,345	16,318	21,862	26,002	18.9%	6.0%
Ft. Lauderdale	August	250,879	289,245	325,749	326,569	335,088	2.6%	6.3%
Total Florida	*YTD August*	*857,127*	*962,058*	*1,057,443*	*1,101,794*	*1,156,955*	*5.0%*	*5.9%*

CANADA

COMPETITIVE LANDSCAPE

Top Competitors

United States: New York, Washington, California, Nevada, Michigan

Long Haul: Cuba, France, China, UK, DR

Consumer Profile

Snowbirds (& Sunlovers)

- Almost a million will spend a month or more in sunny southern destinations
- 75% travel to Florida, 15% Arizona, 5% TX & CA;
- 44% are ages 55-64 & 56% are 65+
- Less likely to stay in hotels, preferring their second or rented homes, or RVs
- Responsible for short-term visitors who see or stay with snowbirds
- Spending patterns similar to resident Floridians so money they inject into Florida is more broadly diffused

CANADA

CONSUMER PROFILE

Boomers – 45 years or older (Short term leisure visitors)

- 57% of Boomers have or expect an inheritance; 1 in 5 to receive more than 100K
- Spending intentions: Travel #1 followed by foreign real-estate investment
- Empty nesters
- Buy based on quality, not price
- Make repeated trips to Florida

CANADA

CONSUMER PROFILE

Geographic differences

- 10 provinces and 3 territories
- Over 90% live on Red Ribbon (US/CDN border)
- Biggest markets are Ontario and Quebec – 2/3s of the population
- Quebecers are both high and low end travellers predominantly from Nov – Apr
- Ontarians are mixed late and advanced bookers and travel year round to southern destinations

CANADA

CONSUMER PROFILES

Geographic differences

- Trend building of West to East travellers
- Calgary, Edmonton and Vancouver emerging markets for eastern destinations
- Western travellers taking more trip per year than other Canadians

CANADA

CONSUMER PROFILES

Internet is king!

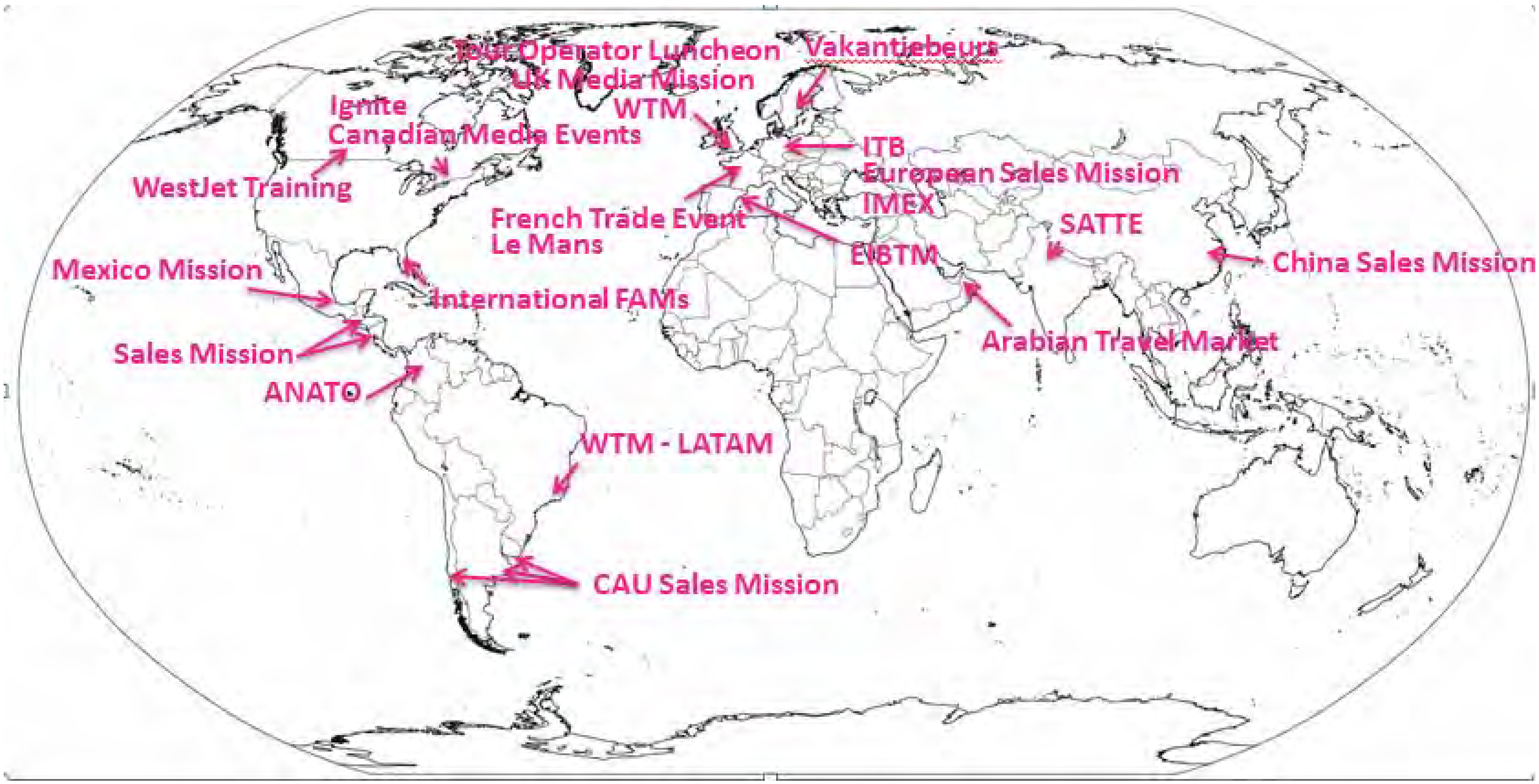
- Canadians spend more time online than any other country
- 45.6 hours per month vs 40.3 in US
- Canadian e-commerce spending totaled $22.3 billion in 2012
- Smartphone penetration has reached 45% of the Canadian mobile market

CANADA

OPTIMUM DISTRIBUTION CHANNELS

- Co-op advertising with major partners such as airlines, OTAs
- Social media
- Promotions

Canada


Tour Operator Luncheon
UK Media Mission
Vakantiebeurs
Ignite
WTM
Canadian Media Events
ITB
European Sales Mission
WestJet Training
IMEX
French Trade Event
Le Mans
SATTE
EIBTM
China Sales Mission
Mexico Mission
International FAMs
Arabian Travel Market
Sales Mission
ANATO
WTM - LATAM
CAU Sales Mission

IMPORTANCE
APPROACH
COMPETITION
INSIGHTS
PLATFORM
☐ TACTICS
■ EVENT CALENDAR

INTERNATIONAL TRADE & EVENTS CALENDAR

		DATE	LOCATION
JULY 2013			
	Gala Awards Dinner	7/4/2013 & TBD	London; Dublin
New	UK Summer Event (Jamie Oliver)	7/9/2013	London, England
	DMAI	7/15-17/2013	Orlando, FL
AUGUST 2013			
MP	IncentiveWorks	8/20-21/2013	Toronto, Ontario
	US Consulates Road Show	8/31/2013	Guangzhou, China
SEPTEMBER 2013			
New	Brazil VIP (around ABAV)	9/4/2013	Sao Paulo, Brazil
	ABAV	9/4-8/2013	Sao Paulo, Brazil
PR	ABAV (PR)	9/4-8/2013	Sao Paulo, Brazil
	Governor's Conference	9/11-13/2013	Orlando, FL
	FIT	9/14-17/2013	Buenos Aires, Argentina
New	India VIP Event	9/20/2013	Mumbai, India
	India Mission	9/22-27/2013	Mumbai; New Delhi
New	Nordic and Netherlands Sales Mission+AMS	9/23-27/2013	Scandinavia/ Amsterdam
New	Europe PR Event	9/26/2013	Hamburg, Germany
	US Consulates Road Show	9/TBD/2013	Chengdu/Chongqing, China
OCTOBER 2013			
	Routes World Forum	10/5-8/2013	Las Vegas, NV
New	ITB Asia	10/23-25/2013	Singapore
	SITV (Montreal)	10/25-27/2013	Montreal, Quebec
	Central America Sales Mission	10/TBD/2013	Guatemala; Costa Rica

PR: Denotes Public Relations Program
New Programs are bolded

		DATE	LOCATION
NOVEMBER 2013			
	Florida UK Night	11/4/2013	London, England
PR	WTM Media Drinks Reception	11/4/2013	London, England
	World Travel Market	11/4-7/2013	London, England
PR	French Trade Event	11/7/2013	Paris, France
PR	Florida for Foodies: Canada Media Group Fam	11/15-19/2013	Fort Lauderdale and Palm Beach, Florida
PR-New	Group Media Fam (German-speaking)	11/16-22/2013	St. Pete/Crystal River Florida
MP	EIBTM	11/19-21/2013	Barcelona, Spain
	India Media Fam	11/TBD/2013	Miami, Orlando, Space Coast & Tampa, Florida
	China Travel Trade Fam	11/TBD/2013	Florida
	India Trade FAM	11/TBD/2013	Florida
DECEMBER 2013			
	Marketing Retreat	12/2-4/2013	Palm Beach Gardens, FL
	SATW Canadian Conference	12/2-5/2013	Sarasota, FL
	SATW post fam	12/5-8/2013	4 fams
	China Individual Media FAM	12/TBD/2013	Orlando & Miami, FL
JANUARY 2014			
	Florida Huddle	1/14-16/2014	Palm Beach, FL
	Vakantiebeurs	1/14-19/2014	Utrecht, Netherlands
PR	Media Group FAM (UK/Ireland)	1/15/2014	Florida
	SATTE	1/29-31/2014	New Delhi
	Gala Awards Dinner	1/TBD/2014	Dublin
	New Product Fam (UK/Ireland/ Gerrmany)	1/TBD/2014	Florida
PR	Media Mission France/UK	1/TBD/2014	France/UK
	TWIGS	1/TBD/2014	Palm Beach, FL
	Florida/Canada Signature Event	1/TBD/2014	Toronto, Ontario

IMPORTANCE
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EVENT CALENDAR

INTERNATIONAL TRADE & EVENTS CALENDAR

		DATE	LOCATION
FEBRUARY 2014			
	RSAA	2/4-5/2014	Washington, DC
New	VUSA Seminar CH	2/5/2014	Zurich, Switzerland
New	VUSA Seminar Austria	2/6-7/2014	Linz, Austria & Graz,Ausria
	Canada Media Event: Rise and SUNshine	2/25/2014	Toronto, Ontario
	Canada Media Event: Rise and SUNshine	2/26/2014	Calgary, Alberta
	ANATO	2/TBD/2014	Bogota, Colombia
	UK Tour Operator Advisory Luncheon	2/TBD/2014	London, England
MARCH 2014			
	ITB	3/5-9/2014	Berlin, Germany
PR	ITB PR	3/5-9/2014	Berlin, Germany
	ITB Signature Event: Pan Am	3/6/2014	Berlin, Germany
	Media Group FAM (UK/Ireland)	3/24-28/2014	Florida
	France/UK Media Mission	3/24-28/2014	Paris, France
New	Mexico Sales Mission	3/TBD/2014	Mexico City, Mexico
APRIL 2014			
New	Jaguar Enthusiasts' Club	4/1-26/2014	Florida
	Int'l Pow Wow	4/5-9/2014	Chicago, IL
	Arabian Travel Mart	4/28-5/1/2014	Dubai, UAE
	US Consulate Roadshow	4/TBD/2014	China
New	WestJet Training	4/TBD/2014	Calgary, Canada
	WTM - LATAM	4/23-25/2014	Sao Paulo, Brazil
	China Sales Mission	April & May 2014	Shanghai, Beijing, Guangzhou/Chengdu/ TBD, China
MAY 2014			
MP	IMEX	5/20-22/2014	Frankfurt, Germany
PR	TMAC	5/28-31/2014	Pittsburgh, PA
	Irish Luncheon	5/TBD/2014	Dublin, Ireland
	Central America Sales Mission	5/TBD/2014	Guatemala; Costa Ric,
	Sales Mission CAU	5/TBD/2014	Buenos Aires; Santiago; Montevideo

		DATE	LOCATION
JUNE 2014			
	European Sales Mission	6/2-6/2014	Germany
	Le Mans	6/14-15/2014	Le Mans, France
MP	Ignite	6/19-20/2014	Toronto, Ontario
	Media Munch n Mingle Event	6/24/2014	Toronto, Ontario
ONGOING			
New	VUSACOM Roadshow	TBD	Mumbai; New Delhi; TBD
PR	Individual Media Fams (UK PR)	ongoing	Florida
	University of VISIT FLORIDA	ongoing	Canada
PR	Individual Media Fams (Europe PR)	ongoing	Florida
PR	Media Fam Tour (Individual - Canada PR)	ongoing	Canada
	Latin America Sales Activity	ongoing	Brazil; Argentina
	UK Sales Calls	ongoing	UK/Ireland
	Europe Sales Calls	ongoing	Germany
	China Sales Calls	ongoing	

PR: Denotes Public Relations Program
New Programs are bolded

previous

International Co-Ops

With Tour Operators

UNITED KINGDOM

- British Airways
- Virgin Atlantic
- Funway
- Travel Biz
- BMI Publishing

GERMANY

- CANUSA
- American Unlimited

CANADA

- Red tag.ca Vacations
- SunWing