

EXECUTIVE SUMMARY

Review the findings of the International Research Project

OBJECTIVE: Review the top line results of the recently completed International Research project conducted in Germany and London, UK.

CONSIDERATIONS: The TDC recommended and the Board of County Commissioners approved on July 22, 2008 an expenditure of Emergency Funds to enhance our marketing efforts in the International markets of Germany, UK and Canada in FY 08 and FY 09. Part of the approved project list for FY 09 was a first-ever research project in the UK and Germany. This research was a collaborative effort between Research Data Services, Paradise Advertising and Marketing, Inc., the CVB Executive Director and our European and UK Representatives. The project took place the week of November 3-7, and the attached reports are a summary of the findings of all of those sessions.

COUNTY ATTORNEY FINDING: A County Attorney finding is not necessary for this review.

FISCAL IMPACT: The budgeted cost of this project is \$ 37,500 and is in the approved Tourism Department FY 09 budget in Fund 196.

GROWTH MANAGEMENT IMPACT: There is no impact to the Growth Management Plan related to this action.

RECOMMENDATION: Review and approve the report of the International Research Project.

PREPARED BY: Jack Wert, Tourism Director

INTERNATIONAL RESEARCH PROJECT



OVERVIEW

- **Research Meetings and “Roundtable Discussions” in London and Germany the Week of Nov. 3-7**
- **London, UK**
 - **Tour Operators**
 - **Travel Agents**
 - **Travel Journalists**
- **Germany**
 - **Frankfurt- Tour Operators**
 - **Munich- Tour Operators**
 - **Hanover- Tour Operators**
 - **Hamburg- Tour Operators**

London (Nov. 4-5)

➤ Tour Operators

- Virgin Holidays
- Funway Holidays
- Bon Voyage

➤ Airlines

- Virgin Atlantic

➤ Travel Agents

- Advantage Travel
- N. American Travel
- Travel Time World

➤ Travel Media

- Travel Bulletin
- Travel Mole
- ABTA News
- BMI Publications

Germany (Nov. 6-7)

- **Tour Operators**
 - **Neckermann**
 - **Thomas Cook**
 - **DERTOUR**
 - **FTI**
 - **Airtours TUI Germany**
 - **CANUSA**

Summary of Findings

- **Our new Full time representation in UK and Europe signals our commitment to these markets**
- **Our new International websites helpful to travel trade and to consumers seeking information on our destination**
- **Presidential Elections have changed perception of U.S. into a favorable destination for travel**
- **Best conduit to reaching ultimate customer is through travel trade**
 - **Use their customer lists and target our visitor profile**
 - **Product Managers have not been here- Fams needed**

Summary of Findings

- Brits and Germans will take at least one family holiday in 2009- most likely to U.S./Florida
- Not cancelling their booked travel to US/Florida
- Travelers looking for “value added” offerings (free breakfast, spa treatment, golf, eco excursion)
- We share English language so we are “comfortable” destination for Brits
- Many Germans speak and understand English so they feel comfortable here
- Our area primarily attracts high end travelers
- Florida traffic will grow in 2009 but at a slower pace than in 2008
- Most travel is booked through travel agents or tour operator reservation agents

Summary of Findings

- Detailed maps are very important to show access from Interstates, Miami & Orlando
- Internet is heavily used for research, but phone is used for booking
 - On-line bookers returning to travel agents after collapse of Travel City Direct in UK
 - Link our International website to Tour Operator website/booking engines
- U.S. is still a bargain even with stronger dollar due to lower hotel and attraction rates/deals
- Rental car rates cost much less in Florida
- Gasoline is perceived as a real bargain here
- “Gulf of Mexico destination” is important selling point
- International Florida visitor traffic controlled by number of aircraft/flights

Summary of Findings

- **U.S. Immigration policies and procedures continue to be a negative for travel here**
 - Made to feel like “second class citizens”
- **The Tour Operators that began selling 2009 travel in July/August are ahead of 2008 pace in Florida sales**
 - Forecast is quite optimistic in UK and Germany for good 2009 with narrowed booking window
- **January traditionally the largest booking month in UK and Germany**
 - May see delays to March or April in 2009

Summary of Findings

- **Future growth market is younger, nature and adventure seeking travelers**
 - Small ad-hoc groups
 - Seeking value
 - Low cost or self-catered accommodations
- **Nature/eco valued above cultural experiences**
- **Everglades are better known as East Coast Florida destination**
 - We need to take “ownership” of Everglades
- **Florida is two destinations:**
 - Orlando/Disney
 - The rest of Florida

What Is Our Brand?

- Boutique, unique
- Fulfills a dream
- Paradise
- Calmer, relaxed
- Place to unwind
- Discerning destination
- Discover the “new” Paradise
- “Florida” is the master brand
- Off the beaten path
- High Quality Food (seafood)
- Jewel in the crown
- Top reputation
- Beaches and warm weather
- Chill out destination
- Sophisticated
- Unique offerings
- Good infrastructure in cities
- Great shopping alternatives
- Perennial return visitation destination
- Family oriented, secure

Who is Our Competition?

➤ In UK

- Short haul destinations- Coastal Spain & France, Canary Islands
- Indian Ocean locations (Maldives, Seychelles, Mauritius)
- North Africa (Egypt & Red Sea Resorts)
- Barbados

➤ In Germany

- Asia and third world destinations
- All inclusive resorts
- Caribbean
- Dubai
- N. Africa

Next Steps

- Follow up with all contacts through UK & Germany Reps
- Research and schedule International Tour Operator on-line and direct promotions
- Enhance German and UK websites with links to Tour Operator booking sites
- Intensify Everglades and eco activities into all International creative
- Organize Product Manager & Media Fams
- Work with TIA and Visit Florida on Immigration issues
- Complete German Visitor Guide (print & digital)
- Monitor new websites and tour operator reports