

German Traveler Survey: Perceptions & Intentions of Sun and Water travel to the U.S., Florida and The Florida Keys & Key West

Prepared for:

The Florida Keys & Key West



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INTRODUCTION

The Florida Keys & Key West TDC sought to study the German travel market for insights and direction into their perceptions for sun and/or water holidays; including a focus on how that travel was booked and what the perceptions of The Florida Keys & Key West specifically.

While matters of policy were not addressed, we did seek to understand how prevalent the attitude among likely German travelers to the U.S. that: Florida's main attraction lies in its theme parks with a lower interest to experience other destinations. Also, how familiar is the Germany traveler with the Florida Keys & Key West destination? Are the Florida Keys & Key West seen as an experience worthy of a stand-alone holiday (i.e. a single destination holiday), or is it seen primarily as a draw for a dual-destination holiday (i.e. a holiday in combination with another destination).

More than this, we investigated methods and approaches to reach this market. To accomplish this – we asked a series of questions about planning and booking options for German travelers on sun/water holidays; media sources used for travel planning ; past holiday trade fair attendance and time of year most likely to take a sun/water holiday.

METHODOLOGY

To best understand German travel perceptions and intentions of U.S., Florida and Florida Keys & Key West holidays, we conducted a proprietary quantitative research study. A 12 minute, 35 question survey was developed and it was determined that the best method for data collection was via an online panel of German travelers.

The panel provider, Research Now, was selected to host, distribute and collect responses to the survey. An invitation to participate in the survey was distributed to panel participants during the second week in September 2012. A statistically valid sample was obtained after five days in the field. In order to be eligible to participate in the study, a respondent had to have either previously traveled to the U.S. or be willing to consider the U.S. for a holiday within the next 2 to 3 years. 403 qualified respondents completed our survey, giving us a statistically valid sample with +/- 0.05 margin of error.

NARRATIVE SUMMARY OF RESULTS

Perceptions and Intentions toward Florida Holidays

Let us start with a look at some perceptions and past behaviors of German travelers. We asked German travelers what media they turn to for travel planning. The best media to advertise in to reach German travelers deciding where to go and what to do on holiday are: MERIAN (24.8 percent); Geo Saison Magazine (24.1 percent); Opodo.de (19.4 percent); National Geographic German Edition (18.9 percent); F.A.Z. / FAS (18.6 percent); abenteuer und reisen (15.6 percent) and SuddeutscheZeitung (13.6 percent).

Less popular publications for planning were: Traveler Magazine (1.5 percent); Uralub Perfekt (1.7 percent); Travel Talk (2.5 percent) and Mein Uralub (2.7 percent).

A majority (61.0 percent) have not attended a holiday trade fair/travel show. Those that have attended ITB – Messengelände Berlin (16.1 percent); Internationale ReisemesseKöln – Cologne (7.4 percent) and Fahrrad Und Erlebnisreisen – Stuttgart (5.2 percent). ITB – Messengelände Berlin is the clear favorite, though competition from other destinations is likely fierce.

The advertising efforts of (combined) Florida destinations has reached the majority of the German traveling public. 78.2 percent do recall seeing some type of advertising for one or more Florida destinations, or the state as a whole. Miami topped the media list at 56.8 percent recall; followed by Orlando (50.4 percent). **The Florida Keys & Key West had the third strongest advertising recall among German travelers (42.7)** followed by Fort Lauderdale (28.3 percent). The State of Florida as a whole has a recall of 31 percent.

Recalling advertising is one thing, understanding why German travelers select Florida to begin with is quite another. We asked respondents to indicate how much they agree or disagree with various statements about Florida. The majority agree that 'you go to Florida for sun holidays' (77.9 percent), that 'Florida has many diverse areas/attractions to visit' (75.4 percent), and 'it's a place you can visit again and again' (68.2 percent). Notably, 41.7 percent already agree that Florida is somewhere you go for water-sports holidays. This high percentage will serve the destination well, as much of the awareness for a sun/water holiday already exists as part of the consideration set for German travelers to Florida.

Capitalizing on the German traveler's acknowledgment that Florida is a place you can visit again and again may serve to boost future visitation of German travelers.

29.8 percent agree that Florida's main attraction are its coastal beach towns, while 18.1 percent believe Florida's main attraction is really the amusement parks in the Orlando area. Florida's cities/metropolitan areas are the main attraction for only a few (10.4 percent).

What is interesting about our survey responses is that 53.3 percent have previously visited Florida. For those 53.3 percent, we asked a series of questions about their past visit to the state. Two items need to be highlighted for these respondents. One, the largest percentage (82.3 percent) agree they want to go back (to Florida) for the beaches and ocean. Two, they understand that Florida is more than just Orlando – with just 6 percent agreeing that having been to Orlando, they feel like in terms of Florida they've been here and 'done that'. Taken together – it is easy to conclude that the attributes of the Florida Keys & Key West position the destination to take advantage of a German traveler's desire to visit Florida.

A deeper look at the data reveals that 59.1 percent agree that they want to go back (to Florida) for the more undiscovered areas, small towns and rural areas; 37.2 percent agree that they want to go back (to Florida) for the metropolitan/city areas with shopping and nightlife. Only 29.8 percent want to go back (to Florida) for the theme parks.

Perceptions and Intentions towards Florida Keys & Key West holidays

When German travelers consider Florida for their next sun and/or water holiday, **the Florida Keys & Key West (60.2 percent) will be the second most popular destination considered;** following Miami (61.0 percent) and besting both Ft. Lauderdale (36.5 percent) and West Palm Beach (34.9 percent). There were a limited number of undecided travelers; just 7.5 percent were unsure where in Florida they will consider for their next holiday.

We asked panel respondents a series of questions about their perceptions and intentions toward holidays in the Florida Keys & Key West. 57.4 percent of German travelers are very familiar to somewhat familiar with the Florida Keys & Key West destination. Their perception is very positive. 74.9 percent believe the Florida Keys & Key West are a place worth visiting. The Keys are also seen as "welcoming to visitors from outside the United States (67.7 percent) and also "a great place to go to relax" (63.5 percent). Specifically, the destination was seen as "having lots of things to do and see" (56.8 percent) while also "an ideal place for a get-away destination" (52.6 percent). Unfortunately, the Florida Keys & Key West has a large percentage (70.7 percent) who neither agree or disagree that the destination is primarily for families.

From a marketing perspective, The Florida Keys & Key West should consider increasing awareness as a starting point - four out of ten respondents were not at all familiar to somewhat

unfamiliar with the Florida Keys & Key West. To best reach this group, and raise awareness of the Keys, the media they consult for holiday travel options must be considered.

We were particularly interested in whether German travelers do, or would, consider the Keys as a stand-alone destination. 44.6 percent would consider the Keys for a stand-alone holiday. An astonishing 46.2 percent would only consider the Keys in combination with another destination, a dual-destination holiday.

It was worth exploring this notion of a dual-destination holiday. When we paired a visit to the Florida Keys with a dual-destination of Cuba, 72.4 percent were very interested to somewhat interested in this option.

As a holiday destination, 62.3 percent found the Florida Keys & Key West to be an 'excellent' or 'good' holiday destination; while 34.7 percent were neutral/undecided. A similar percentage (44.2) were unlikely to visit the Florida Keys and/or Key West for a holiday in the next two years. Conversely, 55.9 percent were somewhat to very likely to visit.

We wanted to know if respondents had ever been to the Florida Keys and/or Key West, and 36.5 percent said they had. The area visited was Key West (90.5 percent), Big Pine and the Lower Keys (42.2 percent), Marathon (43.5 percent), Islamorada (43.5 percent) and Key Largo (68.7 percent).

Main Holidays

When thinking about where to go for their main holiday, that time(s) during the year when German travelers take a long holiday away is during the month of September (38.5 percent), August (31.8 percent) and October (20.3 percent). Off-peak travel periods were January (8.2 percent) and December (9.9 percent).

Top attributes in a holiday destination sought for this group are warm weather (54.6 percent); beaches (44.9 percent); nice scenery/picturesque views (40.7 percent); and opportunities to relax/de-stress (40.7 percent). Infrequent attributes cited were: lots of nightlife activity (4.2 percent); Festivals or events (4.5 percent); All inclusive pricing (5.7 percent); theatre, live performance arts, cultural activities (5.7 percent); and the exchange rate (6.7 percent).

Here again we are presented with marketing direction for concepts that will resonate with German travelers. Based on the results of this study, emphasis should be placed on images that convey the destination as a warm weather retreat with nice beaches and picturesque views. Special events and an engaging night life should be de-emphasized. It was

interesting to note the low (6.7 percent) mention of the exchange rate. To us, this confirms that German travelers are not price sensitive to selecting destinations; and like other travelers – should appreciate good value in exchange for their spending dollar. Additionally, the low score for all-inclusive pricing points us in the direction of marketing and advertising that builds brand first, and places price-promotion second.

Top choices for accommodations when on a main holiday followed a predictable pattern. 37.3 percent selected a well-known brand/chain hotel; followed by a boutique hotel/local hotel (18.9 percent); vacation/holiday rental (18.4 percent) and a Bed and Breakfast (6.2 percent). Condos / Condominiums (1.5 percent) Campground/Cabin/Caravan/RV Park (3.0 percent) did not fare well.

Sun and Water Holidays

We asked respondents in an **open ended question (unaided)** where they felt are the top three best places in the world to go on a sun and/or water holiday. Most often named was: Florida (68 specific mentions), Thailand (52), Spain (50), Maldives (40), Canary Islands (39) and Italy (38).

Within the US: Florida Destinations (135 mentions), California (36 mentions) and Hawaii (31 mentions) came out on top.

Within Florida (68 specific mentions): Miami (33 mentions) was the most prevalent, with Ft. Lauderdale (7 mentions) and Key West (6 mentions) two and three.

In an **aided question** on what destination(s) they will consider for their next sun and/or water holiday, Florida, United States were the most often selected (59.8 percent). Second on that list, California, United States (51.9 percent). Also mentioned, Canary Islands (38.7 percent); Thailand (34.0); Majorca/Ibiza/Balearic Islands of Spain (33.0) and Greek Islands/Greece (30.8 percent). These should be considered Florida's toughest competitors.

Conclusion

Our results need to be put into the proper context of how German travelers are planning their holidays. This group is likely to plan their next sun or water holiday on their own, using the internet (70.2 percent), via referrals from friends & family (36.0 percent) and via Travel guide/book (29.0 percent). Less frequently cited planning sources include Newspapers (6.5 percent) and television/travel shows (10.7 percent).

We took a deeper look at how these travelers will use the internet to help them decide where to go. In a 'select all that apply' type question, the most frequently selected were Google (74.2 percent), Expedia (55.5 percent) and TripAdvisor (55.1 percent). Tourism Bureau websites (21.2 percent) and Travel blogs (24.0 percent) gathered a respectable amount of mentions.

We broke out the process of planning where to stay and the process of what activities to engage in. First let's take a look at planning where to stay. German travelers are most likely to do so on their own, via the internet before they depart (68.5 percent). 31.0 percent will use an online travel agency like Expedia, Priceline.com, etc. and a similar percentage (30.3 percent) will use online referrals from travel review sites. Referrals from friends and family remain popular (28.5 percent); as re travel guide/book/articles (22.1 percent). Not so popular is on their own, via the internet when they arrive (11.2 percent). 8.2 percent will do so on their own by contacting the business directly.

Concerning activities to do, planning took on a different dimension. Still tops, planning on one's own, via the internet before departure (57.6 percent), however, travel guide/book/article was selected with the second most frequency (39.5 percent); followed by referrals from friends and family (34.7 percent). On one's own, via the internet upon arrival had an incidence of 25.3 percent.

In a slight variation of the same question, we asked how the German traveler is likely to book (not just plan) accommodations (and activities) for their next sun or water holiday. On the booking front, most (55.3 percent) are likely to do so on their own, via the internet sites of the hotel itself with 48.1 percent booking on their own, via 3rd party online travel sites like Expedia, Priceline.com, etc. The use of travel agent (22.6 percent); contacting businesses directly prior to departure (19.1 percent) and via a tour operator (13.9 percent) round out the top five.

For booking (not just planning) activities on their next sun or water holiday, German travelers will do so on their own, via the internet sites of the attractions (45.7 percent). Other top mentions include on their own, contacting businesses directly when they arrive (29.3 percent); on their own, via the internet when they arrive (27.3 percent) or on their own, via a 3rd party online travel site like Expedia, Priceline.com, etc. (25.6 percent).

Taken together, we see that German travelers will gather all the necessary information needed to plan a trip – but in some instances will actually wait until arriving in the destination to make the transaction, especially in terms of attractions / things to do. For marketers, this means a de-emphasis on out-of-market activity marketing and for the destination partners, an emphasis on technology that allows purchase via online channels.

Data Tables

1. Have you ever visited the United States?		
Yes	319	79.2%
No	84	20.8%
Total	403	100.0%

2. Would you consider a holiday to the United States sometime during the next 2 to 3 years?		
Yes	403	100.0%
No	0	0.0%
Total	403	100.0%

3. How often do you take a sun and/or water holiday?		
More than once a year	154	38.2%
Annually/About once a year	149	37.0%
About every other year	42	10.4%
Usually every three to five years / Have previously, but not with any regularity	46	11.4%
I have never taken a sun and/or water holiday	12	3.0%
Total	403	100.0%

5. How likely are you to plan a sun and/or water holiday within the next two years?		
Very likely	293	72.7%
Likely	48	11.9%
Somewhat likely	35	8.7%
Unlikely	20	5.0%
Very unlikely	7	1.7%
Total	403	100.0%

6. What area(s) outside of Germany (if any) are you likely to consider for your next sun and/or water holiday? (Select all that apply.)		
Florida, United States	241	59.8%
Greek Islands/Greece	124	30.8%
Canary Islands	156	38.7%

Majorca/Ibiza/Balearic Islands of Spain	133	33.0%
Cyprus	65	16.1%
Costa del Sol /Coast of Spain	81	20.1%
Costal Italy/Southern Italy	111	27.5%
California, United States	209	51.9%
The Maldives	138	34.2%
The Bahamas	112	27.8%
Corsica/The South of France	92	22.8%
Netherlands	30	7.4%
Lakes of Austria	27	6.7%
Cancun/Mexico	87	21.6%
Jamaica	69	17.1%
Thailand	137	34.0%
Egypt	73	18.1%
Cuba	74	18.4%
Dubai	89	22.1%
Brazil	73	18.1%
Turkey	96	23.8%
Croatia	86	21.3%
Unsure/ Have not considered	11	2.7%
I will likely only consider places within Germany	4	1.0%
Other, please specify	36	8.9%

7. What area(s) in Florida will you consider for your next sun and/or water holiday? (Select all that apply.)		
Daytona Beach	50	20.7%
Destin	11	4.6%
Ft. Lauderdale	88	36.5%
Ft. Myers	70	29.0%
Miami	147	61.0%
Orlando	73	30.3%
Panama City	21	8.7%
Sarasota	23	9.5%
St. Augustine/Jacksonville	22	9.1%
Tampa	52	21.6%
The Florida Keys/Key West	145	60.2%
West Palm Beach/Palm Beach	84	34.9%
Somewhere else in Florida	0	0.0%
Other, please specify	12	5.0%
Unsure/undecided	18	7.5%

8. How will you likely plan where to go on your next sun or water holiday?		
Tour Operator	55	13.6%
Travel Agent	93	23.1%
On my own, via the internet	283	70.2%
On my own, contacting businesses directly	83	20.6%
Travel guide/book.	117	29.0%
Referrals from friends & family	145	36.0%
Television/Travel shows	43	10.7%
Magazines	52	12.9%
Newspapers	26	6.5%
Other/, Please specify	13	3.2%
Not applicable/don't know	11	2.7%

9. How did you (or will you) use the internet to help you decide where to go to. (Select all that apply.)		
TripAdvisor	156	55.1%
Google	210	74.2%
Bing	14	4.9%
Conduit	4	1.4%
Ask.com	2	0.7%
Facebook	30	10.6%
YouTube	23	8.1%
Twitter	4	1.4%
Instagram	4	1.4%
Travel blogs	68	24.0%
Orbitz	18	6.4%
Travelocity	22	7.8%
Expedia	157	55.5%
Priceline.com	24	8.5%
Booking.com	104	36.7%
Tourism Bureau website	60	21.2%
Other, please specify	45	15.9%

9aA. PLANNING WHERE TO STAY How will you likely plan where to stay and activities to do on your next sun or water holiday?		
Tour Operator	73	18.1%
Travel Agent	86	21.3%
On my own, via the internet before I depart	276	68.5%

On my own, contacting businesses directly before I depart	85	21.1%
On my own, via the internet when I arrive	45	11.2%
On my own, contacting businesses directly when I arrive	33	8.2%
Travel guide/book/article etc.	89	22.1%
Referrals from friends & family	115	28.5%
Online referrals from travel review sites	122	30.3%
Tourism Bureau website	68	16.9%
Online travel agency like Expedia, Priceline.com	125	31.0%
Other/Not applicable/don't know	17	4.2%

9aB. ACTIVITIES TO DO How will you likely plan where to stay and activities to do on your next sun or water holiday?		
Tour Operator	35	8.7%
Travel Agent	48	11.9%
On my own, via the internet before I depart	232	57.6%
On my own, contacting businesses directly before I depart	63	15.6%
On my own, via the internet when I arrive	102	25.3%
On my own, contacting businesses directly when I arrive	72	17.9%
Travel guide/book/article etc.	159	39.5%
Referrals from friends & family	140	34.7%
Online referrals from travel review sites	102	25.3%
Tourism Bureau website	82	20.3%
Online travel agency like Expedia, Priceline.com	51	12.7%
Other/Not applicable/don't know	31	7.7%

9b. How will you likely book accommodations for your next sun or water holiday? (Select all that apply)		
Tour Operator	56	13.9%
Travel Agent	91	22.6%
On my own, via the internet sites of the hotels/other accommodations	223	55.3%
On my own, via a 3rd party online travel site like Expedia, Priceline.com, etc.	194	48.1%
On my own, contacting businesses directly before I depart	77	19.1%
On my own, via the internet when I arrive	41	10.2%
On my own, contacting businesses directly when I arrive	24	6.0%
Tourism Bureau website	33	8.2%
Other	8	2.0%
Not applicable/don't know	16	4.0%

9c. How will you likely book activities for your next sun or water holiday? (Select all that apply)		
Tour Operator	47	11.7%
Travel Agent	60	14.9%
On my own, via the internet sites of the attractions	184	45.7%
On my own, via a 3rd party online travel site like Expedia, Priceline.com, etc.	103	25.6%
On my own, contacting businesses directly before I depart	92	22.8%
On my own, via the internet when I arrive	110	27.3%
On my own, contacting businesses directly when I arrive	118	29.3%
Tourism Bureau website	73	18.1%
Other	25	6.2%
Not applicable/don't know	30	7.4%

10. Which of the following newspapers and magazines do you read for travel planning information, that is deciding where to go and what to do on holiday. (Select all that apply)		
Mein Uralub	11	2.7%
Uralub Perfekt	7	1.7%
Geo Saison Magazine	97	24.1%
abenteuer und reisen	63	15.6%
REISE & REISEN	33	8.2%
MERIAN	100	24.8%
HIDEAWAYS	14	3.5%
TravelTalk	10	2.5%
Touristic aktuell	20	5.0%
Clever reisen!	27	6.7%
F.A.Z / FAS	75	18.6%
American Journal Magazine	21	5.2%
Die Wilt/Welt Sonntag	64	15.9%
Opodo.de	78	19.4%
Spartacus Traveler Magazine	6	1.5%
National Geographic German Edition	76	18.9%
Bild	28	6.9%
SuddeutscheZeitung	55	13.6%
Other, please specify	101	25.1%
Total	403	100.0%

11. Have you ever attended a holiday trade fair/travel show?		
ITB – Messengelände Berlin	65	16.1%
Internationale ReisemesseKöln – Cologne	30	7.4%
Messe Essen – Essen	12	3.0%
VivaTouristika& Caravanning – Frankfurt	9	2.2%

CFT Camping, Freizeit Und Touristick - Freiburg Messehalle	9	2.2%
Reisezeit – Hannover	9	2.2%
Germany Travel Mart – Leipzig	7	1.7%
Tourisma&Caravaning – Magdeburg	3	0.7%
Viva Touristika – Rostock	5	1.2%
Fahrrad Und Erlebnisreisen - Stuttgart	21	5.2%
Other, please specify	31	7.7%
Yes, I have but don't recall which	17	4.2%
No	246	61.0%

12. How familiar are you with the Florida Keys & Key West?		
Very familiar	37	9.2%
Familiar	68	16.9%
Somewhat familiar	126	31.3%
Unfamiliar	99	24.6%
Very unfamiliar	73	18.1%
Total	403	100.0%

13. Based on what you have heard or seen about the Florida Keys & Key West, please indicate if you agree or disagree with the following statements: The Florida Keys & Key West:		
Are a place worth experiencing		
Agree	302	74.9%
Neither Agree nor Disagree	95	23.6%
Disagree	6	1.5%
Total	403	100.0%

Are a good value for a holiday destination		
Agree	81	20.1%
Neither Agree nor Disagree	258	64.0%
Disagree	64	15.9%
Total	403	100.0%

Are an ideal place for a get-away destination		
Agree	212	52.6%
Neither Agree nor Disagree	180	44.7%
Disagree	11	2.7%

Total	403	100.0%
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Have lots of things to do and see		
Agree	229	56.8%
Neither Agree nor Disagree	160	39.7%
Disagree	14	3.5%
Total	403	100.0%

Are a place to go for a green holiday		
Agree	64	15.9%
Neither Agree nor Disagree	265	65.8%
Disagree	74	18.4%
Total	403	100.0%

Are a safe place for people from my country to visit		
Agree	238	59.1%
Neither Agree nor Disagree	155	38.5%
Disagree	10	2.5%
Total	403	100.0%

Are primarily for families		
Agree	38	9.4%
Neither Agree nor Disagree	285	70.7%
Disagree	80	19.9%
Total	403	100.0%

Have unique accommodations which are a major reason to holiday there		
Agree	120	29.8%
Neither Agree nor Disagree	251	62.3%
Disagree	32	7.9%
Total	403	100.0%

Are a great place to go to relax		
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Agree	256	63.5%
Neither Agree nor Disagree	140	34.7%
Disagree	7	1.7%
Total	403	100.0%

Are welcoming to visitors from outside the united states		
Agree	273	67.7%
Neither Agree nor Disagree	118	29.3%
Disagree	12	3.0%
Total	403	100.0%

14. Would you consider coming to the U.S. solely for a "stand-alone" holiday in the Florida Keys & Key West, and/or as a "two-destination" holiday? (Note: a "two-destination" holiday means that you planned your holiday to visit two different holiday destinations during one trip.)		
Stand-alone holiday to the Florida Keys & Key West	34	8.4%
Either a stand-alone holiday OR a two-destination holiday with another area	146	36.2%
ONLY as a two-destination holiday with another area	186	46.2%
I would not consider a holiday to visit the Florida Keys & Key West	37	9.2%
Total	403	100.0%

15. Key West, at the tip of the Florida Keys, is located 145 kilometers from the island of Cuba. Keeping this proximity in mind, how interested would you be in a two-destination holiday with the Florida Keys & Key West and Cuba, a "two-nation vacation"?		
Very Interested	88	21.8%
Interested	119	29.5%
Somewhat Interested	85	21.1%
Not Very Interested	77	19.1%
Not At All Interested	34	8.4%
Total	403	100.0%

16. Have you ever been to the Florida Keys and/or Key West?		
Yes	147	36.5%
No	256	63.5%
Total	403	100.0%

17. Which area of the Florida Keys and/or Key West have you visited?		
Key West		
Yes	133	90.5%
No	10	6.8%
I don't know / I don't remember	4	2.7%
Total	147	100.0%

Big Pine Key and the Lower Keys		
Yes	62	42.2%
No	59	40.1%
I don't know / I don't remember	26	17.7%
Total	147	100.0%

Marathon		
Yes	64	43.5%
No	57	38.8%
I don't know / I don't remember	26	17.7%
Total	147	100.0%

Islamorada		
Yes	64	43.5%
No	56	38.1%
I don't know / I don't remember	27	18.4%
Total	147	100.0%

Key Largo		
Yes	101	68.7%
No	37	25.2%
I don't know / I don't remember	9	6.1%
Total	147	100.0%

18. How would you rate the Florida Keys & Key West as a holiday location?		
Excellent	52	12.9%
Good	199	49.4%
Neutral/ Undecided	140	34.7%

Fair	9	2.2%
Extremely Poor	3	0.7%
Total	403	100.0%

19. How likely are you to visit the Florida Keys and/or Key West for a holiday in the next two years?		
Very likely	23	5.7%
Likely	68	16.9%
Somewhat likely	134	33.3%
Unlikely	132	32.8%
Very unlikely	46	11.4%
Total	403	100.0%

20. Based on all you have heard or seen about FLORIDA, please indicate how much you agree or disagree with the following statements:		
Florida has many diverse areas/attractions to visit		
Agree	304	75.4%
Neither Agree nor Disagree	95	23.6%
Disagree	4	1.0%
Total	403	100.0%

Florida's main attraction is really the amusement parks in the Orlando area		
Agree	73	18.1%
Neither Agree nor Disagree	221	54.8%
Disagree	109	27.0%
Total	403	100.0%

Florida's main attraction is really its coastal beach towns		
Agree	120	29.8%
Neither Agree nor Disagree	230	57.1%
Disagree	53	13.2%
Total	403	100.0%

Florida's main attraction is really its metropolitan/city areas		
Agree	42	10.4%
Neither Agree nor Disagree	229	56.8%

Disagree	132	32.8%
Total	403	100.0%

Florida is a place you can visit again and again		
Agree	275	68.2%
Neither Agree nor Disagree	118	29.3%
Disagree	10	2.5%
Total	403	100.0%

There are undiscovered parts of Florida off the beaten track		
Agree	210	52.1%
Neither Agree nor Disagree	155	38.5%
Disagree	38	9.4%
Total	403	100.0%

Florida is mostly clone towns, each just like the other		
Agree	38	9.4%
Neither Agree nor Disagree	193	47.9%
Disagree	172	42.7%
Total	403	100.0%

Florida is somewhere you go for sun holidays		
Agree	314	77.9%
Neither Agree nor Disagree	82	20.3%
Disagree	7	1.7%
Total	403	100.0%

You should consider hurricanes before booking a trip to Florida		
Agree	193	47.9%
Neither Agree nor Disagree	151	37.5%
Disagree	59	14.6%
Total	403	100.0%

Florida offers green holiday travel options		
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Agree	69	17.1%
Neither Agree nor Disagree	261	64.8%
Disagree	73	18.1%
Total	403	100.0%

Florida is somewhere you go for water-sports holidays		
Agree	168	41.7%
Neither Agree nor Disagree	202	50.1%
Disagree	33	8.2%
Total	403	100.0%

21. What areas of Florida do you recall seeing advertising about? This may include television commercials, magazine & newspaper ads, internet ads, etc.		
Orlando	203	50.4%
The Florida Keys/Key West	172	42.7%
Miami	229	56.8%
The State of Florida as a whole	129	32.0%
Tampa	69	17.1%
West Palm Beach/Palm Beach	75	18.6%
Ft. Lauderdale	114	28.3%
Daytona Beach	77	19.1%
St Augustine/Jacksonville	28	6.9%
Sarasota	18	4.5%
Ft Myers	77	19.1%
Panama City	29	7.2%
Destin	11	2.7%
Florida as a whole	124	30.8%
Somewhere else in Florida, please specify	5	1.2%
Not sure, but I do recall seeing advertising	26	6.5%
Don't recall seeing advertising	88	21.8%

22. How interested are you in learning more about the parts of Florida outside of its major tourist areas, places like its more undiscovered areas, small towns and rural towns?		
Very Interested	145	36.0%
Somewhat Interested	197	48.9%
Not Very Interested	46	11.4%
Not At All Interested	15	3.7%
Total	403	100.0%

23. Have you ever visited Florida?		
Yes	215	53.3%
No	188	46.7%
Total	403	100.0%

24. Thinking about your past holiday(s) in Florida, how much do agree or disagree with the following statements:		
I've been to Orlando, so I feel like in terms of Florida I've been there and done that		
Agree	13	6.0%
Neither Agree nor Disagree	34	15.8%
Disagree	168	78.1%
Total	215	100.0%

I want to go back for the more undiscovered areas, small towns and rural areas		
Agree	127	59.1%
Neither Agree nor Disagree	60	27.9%
Disagree	28	13.0%
Total	215	100.0%

I want to go back for the metropolitan/city areas with shopping and nightlife		
Agree	80	37.2%
Neither Agree nor Disagree	77	35.8%
Disagree	58	27.0%
Total	215	100.0%

I want to go back for the beaches and ocean		
Agree	177	82.3%
Neither Agree nor Disagree	32	14.9%
Disagree	6	2.8%
Total	215	100.0%

I want to go back for Florida's theme parks		
Agree	64	29.8%
Neither Agree nor Disagree	67	31.2%

Disagree	84	39.1%
Total	215	100.0%

25. How likely are you to consider Florida for a holiday within the next two to three years?		
Very likely	70	17.4%
Likely	89	22.1%
Somewhat likely	124	30.8%
Unlikely	92	22.8%
Very unlikely	28	6.9%
Total	403	100.0%

26. Think now about your main holiday. (The time(s) during the year when you take a long holiday away.) Which of the following are MOST important to you when you are deciding where you will go for your main holiday(s)? Limit your selections to what is MOST important to you, selecting all that apply to MOST important.		
Nice scenery/picturesque views	164	40.7%
Opportunities to relax/de-stress	156	38.7%
New experience(s)	102	25.3%
Unique experience(s) / worth sharing	91	22.6%
Beaches	181	44.9%
Local cuisine/gastronomic experience	98	24.3%
A good deal, trip package, tour opportunity	59	14.6%
Historic sites or sites of religious or ancestral significance	74	18.4%
Ease of entry requirements to the country	60	14.9%
Activities for me and/or my family	43	10.7%
The exchange rate	27	6.7%
Shopping	68	16.9%
Nature encounters/wild-life viewing	93	23.1%
All-inclusive pricing	23	5.7%
Festival(s) or event(s) that I would enjoy	18	4.5%
Visiting friends/family	46	11.4%
Amusement park(s)/Theme park(s)	35	8.7%
Theatre, live performance arts, cultural activities	23	5.7%
Lots of nightlife activity	17	4.2%
Spa services/luxury/pampering	39	9.7%
Green tourism options/carbon neutral eco-resorts	32	7.9%
Water sports – snorkeling, kayaking, paddle boarding	52	12.9%
Warm weather	220	54.6%
Other, please specify	10	2.5%

27. What is your top choice for accommodations when you go on your main holiday(s)? Select one		
Vacation/holiday rental	74	18.4%
Well-known brand/chain hotel	152	37.7%
Resort with self-catering accommodations	23	5.7%
Condos / Condominiums	6	1.5%
Boutique hotel/local hotel	76	18.9%
Friend or family home(s)	22	5.5%
B&B	25	6.2%
Campground/Cabin/ Caravan/RV Park	12	3.0%
Other, please specify	13	3.2%
Total	403	100.0%

28. What time of the year do you usually take your main holiday(s)? If you take more than one main holiday a year, select all that apply.		
January	33	8.2%
February	49	12.2%
March	63	15.6%
April	66	16.4%
May	80	19.9%
June	73	18.1%
July	90	22.3%
August	128	31.8%
September	155	38.5%
October	82	20.3%
November	57	14.1%
December	40	9.9%

29. How much did you spend on your last main holiday?		
€1 - €499	21	5.2%
€500 - €999	36	8.9%
€1,000 - €1,999	88	21.8%
€2,000 - €4,999	156	38.7%
€5,000 - €9,999	63	15.6%
€10,000 & up	13	3.2%
Decline to answer	26	6.5%
Total	403	100.0%

30. How many people are in your household?		
1	101	25.1%
2	211	52.4%
3+	91	22.6%
Total	403	100.0%

31. Children under 17?		
Yes	52	17.2%
No	250	82.8%
Total	302	100.0%

32. What is your current age?		
18-19	2	0.5%
20-29	95	23.6%
30-39	99	24.6%
40-49	67	16.6%
50-59	73	18.1%
60-69	54	13.4%
70+	13	3.2%
Total	403	100.0%

33. What is your current marital status?		
Married or civil partnership	203	50.4%
Single, divorced, widow or widower	173	42.9%
Decline to answer	27	6.7%
Total	403	100.0%

34. What is your total household income?		
€1 - €25,999	42	10.4%
€26,000 - €45,999	76	18.9%
€46,000 - €65,999	75	18.6%
€66,000 - €99,999	68	16.9%
€100,000 - €199,999	42	10.4%
€200,000 & up	5	1.2%

Decline to answer	95	23.6%
Total	403	100.0%

35. In what area of Germany do you live?		
Berlin Metropolitan Region	45	11.2%
Bremen/Oldenburg Metropolitan Region	10	2.5%
Frankfurt/Rhine-Main Metropolitan Region	47	11.7%
Hamburg Metropolitan Region	34	8.4%
Hannover-Braunschweig-Göttingen-Wolfsburg Metropolitan Region	20	5.0%
Munich Metropolitan Region	52	12.9%
Nuremberg Metropolitan Region	15	3.7%
Rhine-Neckar Metropolitan Region	10	2.5%
Rhine-Ruhr Metropolitan Region (also covers the Cologne/Bonn Region)	93	23.1%
Central German Metropolitan Region	40	9.9%
Stuttgart Metropolitan Region	37	9.2%
Total	403	100.0%