

Scandinavian 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 Scandinavian 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 Scandinavian 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 likely Scandinavian 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 battery of questions about planning and booking options for Scandinavian 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 Scandinavian 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 Scandinavian 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. 424 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 Scandinavian travelers. We asked Scandinavian travelers what media they turn to for travel planning. The best media to advertise in to reach Scandinavian travelers considering Florida for their next sun

and/or water holiday are: DagensNyheter (11.3 percent); Vagabond Resetidningen (11.1 percent); Aftenposten (9.4 percent); Scanorama (7.8 percent); Jyllands-Posten (7.8 percent); Res (6.8 percent); Se ogHor (5 percent) and Aamulehti (4 percent).

A majority (73.3 percent) have not attended a holiday trade fair/travel show. Those that have attended Tur – Sweden (7.3 percent) and Ferie For Alle – Denmark (5.4 percent). While positive for public relations efforts in the region, it appears that those participating in this survey were not likely to have attended one of these shows.

The advertising efforts of (combined) Florida destinations has reached the majority of the Scandinavian traveling public. 58.3 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 37.7 percent recall; followed by Orlando (30.4 percent). **The Florida Keys & Key West had the third strongest advertising recall among Scandinavian travelers (25 percent)** followed by Fort Lauderdale (20.8 percent). The State of Florida as a whole has a recall of 12.7 percent.

Most Scandinavian travelers agree that ‘you go to Florida for sun holidays’ (61.1 percent), that ‘Florida has many diverse areas/attractions to visit’ (57.1 percent), and ‘it’s a place you can visit again and again’ (39.4 percent). Notably, Florida has an opportunity to present more of its diverse regions to the Scandinavian traveler. 33.3 percent agree there are undiscovered places off the beaten path in Florida. 58.7 percent are interested in learning more about the areas in Florida beyond the major tourist spots. However, they may not know quite how diverse these areas are as 70 percent weren’t sure whether Florida was primarily ‘clone towns’ or not (generic towns undistinguishable from each other).

Capitalizing on the Scandinavian traveler’s interest in learning more about Florida’s areas beyond the major tourist spots, while promoting their uniqueness, may serve to boost interest in travel to Florida.

30.7 percent agree that Florida’s main attraction for most Scandinavian travelers are its coastal beach towns, while 21.2 percent believe Florida’s main attraction if really the amusement parks in the Orlando area. Florida’s cities/metropolitan areas are the main attraction for only a few (11.6 percent).

At first glance, the data seems to indicate that Florida has the opportunity to raise awareness of its green travel options for Scandinavian travelers – as 70.5 percent were unsure if Florida offered green holiday travel options. Unfortunately, as we will see later, green tourism/options for carbon neutral eco-resorts were cited infrequently (2.8 percent) as a destination attribute sought when deciding where to go for a main holiday.

What is interesting about our responses is that 47.2 percent have previously visited Florida. Two items need to be highlighted for these respondents. One, only 10.5 percent agree that that having been to Orlando, that they've been there and done that (in terms of visiting Florida). Two, the largest percentage that agree (39 percent) that they want to go back (to Florida) for the beaches in ocean. Taken together – it is easy to conclude that the attributes of the Florida Keys & Key West position the destination to take advantage of an increase of Scandinavian visitors to Florida.

A deeper look at the data reveals that 33 percent agree that they want to go back (to Florida) for the more undiscovered areas, small towns and rural areas; 24.5 percent agree that they want to go back (to Florida) for the metropolitan/city areas with shopping and nightlife. Only 21.5 percent want to go back (to Florida) for the theme parks.

It should be noted that 37.7 percent agree that 'Hurricane's should be considered when booking a trip to Florida'. This is a travel planning issue, and not easily (nor recommended) addressed via marketing channels.

Perceptions and Intentions towards Florida Keys & Key West holidays

When Scandinavian travelers consider Florida for their next sun and/or water holiday, **the Florida Keys & Key West (45.4 percent) will be the second most popular destination considered;** following Miami (53.4 percent) and besting both West Palm Beach (32.8 percent) and Orlando (30.5 percent). However, there were also potential visitors up for grabs as 24.7 percent were unsure where in Florida they will consider. It was previously noted that the Florida Keys & Key West had the third highest advertising recall.

We asked panel respondents a series of questions about their perceptions and intentions toward holidays in the Florida Keys & Key West. 35.7 percent of Scandinavian travelers are very familiar to somewhat familiar with the Florida Keys & Key West destination. Their perception is very positive. 52.6 percent believe the Florida Keys & Key West are a place worth visiting. The Keys are also seen as "an ideal place for a get-away destination" (40.1 percent) with "lots of things to do and see" (42.7 percent) and "safe for people from Scandinavia to visit" (39.4 percent). Unfortunately, the Florida Keys & Key West has a large percentage (67 percent) who neither agree nor disagree that the destination is a good value.

From a marketing perspective, The Florida Keys & Key West should consider increasing awareness as a starting point - six 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 Scandinavian travelers do, or would, consider the Keys as a stand-alone destination. 56.9 percent would consider the Keys for a stand-alone holiday. Only 16.7 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, 69.1 percent were very interested to somewhat interested in this option. Are there regional marketing opportunities for the Florida Keys & Key West to partner with Cuban Tourism authorities? This is certainly intriguing and worth investigation. If nothing else, the proposal gets us thinking about tourism promotion in a non-traditional manner.

34.4 percent found the Florida Keys & Key West to be an 'excellent' or 'good' holiday destination; while 59.2 percent were neutral/undecided. This share represents an opportunity for staff to raise awareness of the destination. A similar percentage (58.5) were unlikely to visit the Florida Keys and/or Key West for a holiday in the next two years. Conversely, 41.5 percent were somewhat to very likely to visit.

This gap further highlights the need for the Florida Keys & Key West to increase awareness of the destination to get into the consideration set of Scandinavian travelers. Because so many cite a neutral perception – marketing efforts can 'set the tone' for future perceptions. This puts the destination in a unique position, not having to combat previously (negative) understood connotations about the destination.

We wanted to know if respondents had ever been to the Florida Keys and/or Key West, and 36.8 percent said they had. The area visited was Key West (33.3 percent), Big Pine and the Lower Keys (16 percent), Marathon (12.2 percent), Islamorada (12.8 percent) and Key Largo (21.2 percent).

Main Holidays

When thinking about where to go for their main holiday, that time(s) during the year when Scandinavian travelers take a long holiday away is during June (21.9 percent), July (49.8 percent) and August (35.8 percent). Off-peak travel periods were March (9.9 percent), April (7.1 percent) and May (8.5 percent).

Top attributes in a holiday destination sought for this group are warm weather (51.4 percent); opportunities to relax/de-stress (40.6 percent); beaches (34 percent); nice

scenery/picturesque views (33.3 percent) and new experiences (26.2 percent). Infrequent attributes cited were: the exchange rate (7.1 percent); festivals or events (5 percent); lots of nightlife activity (4.5 percent) and green tourism options / carbon neutral eco-resorts (2.8 percent).

Here again we are presented with marketing direction for concepts that will resonate with Scandinavian 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 (7.1 percent) mention of the exchange rate. To us, this confirms that Scandinavian travelers are not price sensitive to selecting destinations; and like other travelers – should appreciate good value in exchange for their spending dollar.

Top choices for accommodations when on a main holiday followed a predictable pattern. 33.3 percent selected a well-known brand/chain hotel; followed by a condominium (14.2 percent); vacation/holiday rental (13.9 percent) and a resort with self-catering accommodations (11.6 percent). Bed and Breakfast options (3.3 percent) and Campground/Cabin/Caravan/RV Park (3.3 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: Spain (79 mentions with Majorca specifically gathering an additional 29 mentions), Thailand (79 mentions), Greece (76 mentions), Italy (63 mentions), Florida (58 mentions) and Turkey (46 mentions).

Within the US (13 specific mentions): Florida (58 mentions), Hawaii (27 mentions) and California (13 mentions) came out on top.

Within Florida (37 specific mentions): Miami (18 mentions) and Ft. Lauderdale (3 mentions) were the two mentioned.

In an **aided question** on what destination(s) they will consider for their next sun and/or water holiday, Greek Islands/Greece were the most often selected (46.2 percent). Second on that list, Florida, United States (41.0 percent). Also mentioned, Thailand (36.6); Costal Italy/Southern Italy (34.9); California, United States (34.7); Majorca/Ibiza/Balearic Islands of Spain (34.7). These should be considered Florida's toughest competitors. As the top choices may suggest, Scandinavian travelers are quite willing to consider destinations outside their country for sun and/or water holidays.

Conclusion

Our results need to be put into the proper context of how Scandinavian travelers are planning their holidays. This group is likely to plan their next holiday on their own, using the internet (66.3 percent), via a Travel Agent (22.4 percent) and via referrals from friends & family (20.5 percent). Newspapers (5.2 percent) and Magazines (4.5 percent) came in low – despite earlier mentions of specific newspapers and magazines as planning sources.

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 (76.5 percent), TripAdvisor (32.4 percent) and Tourism Bureau websites (29.5 percent). Travel blogs was mentioned a respectable 22.1 percent.

It needs to be noted that what Google and TripAdvisor have in common with Tourism Bureau websites is that they desire to replace the Tourism Bureau website – providing all the necessary information a traveler could want right within the Google/TripAdvisor platform.

OTAs were also mentioned, though with strong preferences for type and kind. Booking.com (26.3 percent) and Expedia (23.8 percent) were strong leaders in how Scandinavian travelers will use the internet to help them decide where to go. Travelocity (5.7 percent) and Orbitz (2.8 percent) and Priceline.com (2.5 percent) were the clear laggards.

Based on these results, it would make sense to invest resources (as part of a larger marketing mix for international branding) into first-person accounts of the destination, engaging travel bloggers as brand ambassadors for the Florida Keys & Key West.

As far as planning where to stay and activities to participate in; Scandinavian travelers are most likely to do so on their own, via the internet before they depart (61.6 percent). 28.3 percent will use a Travel Agent and 25 percent a Tour Operator. While referrals from family & friends remains popular (24.3 percent); what is not popular is waiting to arrive in the destination before making plans. 7.3 percent will do so on their own by contacting the business directly and 9.4 percent will do so on their own via the internet (when they arrive). This desire for pre-planning is likely associated with the long-haul nature of holiday trips; as well as the general disposition of Scandinavian travelers in general.

In a slight variation of the same question, we asked how the Scandinavian traveler is likely to book (not just plan) accommodations for their next sun or water holiday. Most (54.7 percent) are likely to do so on their own, via the internet before they depart with 23.1 percent booking on their own, via the internet when they arrive.

Taken together, we see that Scandinavian 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.

We also explored how the Scandinavian traveler will likely book activities for their next sun or water holiday. 39.9 percent will do so on their own, via the internet, on the attraction’s individual site. 30 percent will do so by contacting the businesses directly when they arrive or via the internet when they arrive (20 percent). A smaller percentage will book via Tour Operator (17.7 percent) or Travel Agent (16.7 percent).

DATA TABLES

1. Have you ever visited the United States?		
Yes	287	67.7%
No	137	32.3%
Total	424	100.0%

2. Would you consider a holiday to the United States sometime during the next 2 to 3 years?		
Yes	424	100.0%
No	0	0.0%
Total	424	100.0%

3. How often do you take a sun and/or water holiday?		
More than once a year	80	18.9%
Annually/About once a year	123	29.0%
About every other year	61	14.4%
Usually every three to five years / Have previously, but not with any regularity	89	21.0%
I have never taken a sun and/or water holiday	71	16.7%
Total	424	100.0%

5. How likely are you to plan a sun and/or water holiday within the next two years?		
Very likely	201	47.4%
Likely	63	14.9%
Somewhat likely	67	15.8%
Unlikely	35	8.3%
Very unlikely	58	13.7%
Total	424	100.0%

6. What area(s) outside of Scandinavia (if any) are you likely to consider for your next sun and/or water holiday?

Florida, United States	174	41.0%
Greek Islands/Greece	196	46.2%
Canary Islands	139	32.8%
Majorca/Ibiza/Balearic Islands of Spain	147	34.7%
Cyprus	101	23.8%
Costa del Sol /Coast of Spain	109	25.7%
Costal Italy/Southern Italy	148	34.9%
California, United States	147	34.7%
The Maldives	122	28.8%
The Bahamas	111	26.2%
Corsica/The South of France	85	20.0%
Netherlands	26	6.1%
Lakes of Austria	35	8.3%
Cancun/Mexico	75	17.7%
Jamaica	68	16.0%
Thailand	155	36.6%
Egypt	91	21.5%
Cuba	78	18.4%
Dubai	85	20.0%
Brazil	81	19.1%
Turkey	106	25.0%
Croatia	109	25.7%

7. What area(s) in Florida will you consider for your next sun and/or water holiday?

Daytona Beach	39	22.4%
Destin	5	2.9%
Ft. Lauderdale	54	31.0%
Ft. Myers	14	8.0%
Miami	93	53.4%
Orlando	53	30.5%
Panama City	9	5.2%
Sarasota	11	6.3%
St. Augustine/Jacksonville	12	6.9%
Tampa	35	20.1%
The Florida Keys/Key West	79	45.4%
West Palm Beach/Palm Beach	57	32.8%
Somewhere else in Florida	0	0.0%
Other, please specify	7	4.0%
Unsure/undecided	43	24.7%

8. How will you likely plan where to go on your next sun or water holiday?

If you have an upcoming holiday already scheduled, please indicate how you have planned where to go on that holiday. Otherwise, indicate how you THINK you'll probably plan where to go for your next trip. Select all that apply.

Tour Operator	64	15.1%
Travel Agent	95	22.4%
On my own, via the internet	281	66.3%
On my own, contacting businesses directly	63	14.9%
Travel guide/book.	57	13.4%
Referrals from friends & family	87	20.5%
Television/Travel shows	28	6.6%
Magazines	19	4.5%
Newspapers	22	5.2%
Other/, Please specify	14	3.3%
Not applicable/don't know	51	12.0%

9. How did you (or will you) use the internet to help you decide where to go to. (Select all that apply.)

TripAdvisor	91	32.4%
Google	215	76.5%
Bing	3	1.1%
Conduit	1	0.4%
Ask.com	2	0.7%
Facebook	26	9.3%
YouTube	24	8.5%
Twitter	4	1.4%
Instagram	2	0.7%
Travel blogs	62	22.1%
Orbitz	8	2.8%
Travelocity	16	5.7%
Expedia	67	23.8%
Priceline.com	7	2.5%
Booking.com	74	26.3%
Tourism Bureau website	83	29.5%
Other, please specify	41	14.6%

9aA How will you likely plan where to stay and activities to do on your next sun or water holiday?

Tour Operator	106	25.0%
Travel Agent	120	28.3%
On my own, via the internet before I depart	261	61.6%
On my own, contacting businesses directly before I depart	70	16.5%
On my own, via the internet when I arrive	40	9.4%
On my own, contacting businesses directly when I arrive	31	7.3%
Travel guide/book/article etc.	71	16.7%
Referrals from friends & family	103	24.3%
Online referrals from travel review sites	94	22.2%
Tourism Bureau website	63	14.9%
Online travel agency like Expedia, Priceline.com	78	18.4%
Other/Not applicable/don't know	54	12.7%

9aB How will you likely book accommodations for your next sun or water holiday? (Select all that apply)

Tour Operator	49	11.6%
Travel Agent	43	10.1%
On my own, via the internet before I depart	232	54.7%
On my own, contacting businesses directly before I depart	63	14.9%
On my own, via the internet when I arrive	98	23.1%
On my own, contacting businesses directly when I arrive	86	20.3%
Travel guide/book/article etc.	119	28.1%
Referrals from friends & family	124	29.2%
Online referrals from travel review sites	105	24.8%
Tourism Bureau website	67	15.8%
Online travel agency like Expedia, Priceline.com	37	8.7%
Other/Not applicable/don't know	78	18.4%

9b. How will you likely book accommodations for your next sun or water holiday? (Select all that apply)

Tour Operator	90	21.2%
Travel Agent	112	26.4%
On my own, via the internet sites of the hotels/other accommodations	226	53.3%
On my own, via a 3rd party online travel site like Expedia, Priceline.com, etc.	107	25.2%
On my own, contacting businesses directly before I depart	40	9.4%
On my own, via the internet when I arrive	29	6.8%

On my own, contacting businesses directly when I arrive	11	2.6%
Tourism Bureau website	30	7.1%
Other	9	2.1%
Not applicable/don't know	36	8.5%

9c. How will you likely book activities for your next sun or water holiday? (Select all that apply)		
Tour Operator	75	17.7%
Travel Agent	71	16.7%
On my own, via the internet sites of the attractions	169	39.9%
On my own, via a 3rd party online travel site like Expedia, Priceline.com, etc.	45	10.6%
On my own, contacting businesses directly before I depart	49	11.6%
On my own, via the internet when I arrive	85	20.0%
On my own, contacting businesses directly when I arrive	127	30.0%
Tourism Bureau website	40	9.4%
Other	22	5.2%
Not applicable/don't know	60	14.2%

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)		
Scanorama	33	7.8%
Discover America (Nordic Region)	11	2.6%
Jyllands-Posten	33	7.8%
Copenhagen Post	4	0.9%
Aamulehti	17	4.0%
Helsinki Times	14	3.3%
Se ogHør	21	5.0%
Henne	7	1.7%
Aftenposten	40	9.4%
DagensNyheter	48	11.3%
Göteborgs-Posten	12	2.8%
Affärsresenären	8	1.9%
Res	29	6.8%
Vagabond Resetidningen	47	11.1%
Other, please specify	216	50.9%

11. Have you ever attended a holiday trade fair/travel show? We've listed some specific fairs below, or the option to write in your favorite

Tur - Sweden	31	7.3%
Senior - Sweden	4	0.9%
Reiseliv - Norway	18	4.2%
Ferie For Alle - Demark	23	5.4%
Matka - Finland	14	3.3%
Other, please specify	6	1.4%
Yes, I have but don't recall which	32	7.5%
No	311	73.3%

12. How familiar are you with the Florida Keys & Key West?

Very familiar	16	3.8%
Familiar	41	9.7%
Somewhat familiar	94	22.2%
Unfamiliar	103	24.3%
Very unfamiliar	170	40.1%
Total	424	100.0%

13. Based on all 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	223	52.6%
Neither Agree nor Disagree	188	44.3%
Disagree	13	3.1%
Total	424	100.0%

Are a good value for a holiday destination

Agree	109	25.7%
Neither Agree nor Disagree	284	67.0%
Disagree	31	7.3%
Total	424	100.0%

Are an ideal place for a get-away destination		
Agree	170	40.1%
Neither Agree nor Disagree	231	54.5%
Disagree	23	5.4%
Total	424	100.0%

Have lots of things to do and see		
Agree	181	42.7%
Neither Agree nor Disagree	229	54.0%
Disagree	14	3.3%
Total	424	100.0%

Are a place to go for a green holiday		
Agree	64	15.1%
Neither Agree nor Disagree	321	75.7%
Disagree	39	9.2%
Total	424	100.0%

Are a safe place for people from my country to visit		
Agree	167	39.4%
Neither Agree nor Disagree	236	55.7%
Disagree	21	5.0%
Total	424	100.0%

Are primarily for families		
Agree	43	10.1%
Neither Agree nor Disagree	336	79.2%
Disagree	45	10.6%
Total	424	100.0%

Have unique accommodations which are a major reason to holiday there		
Agree	70	16.5%
Neither Agree nor Disagree	327	77.1%
Disagree	27	6.4%
Total	424	100.0%

Are a great place to go to relax		
Agree	190	44.8%
Neither Agree nor Disagree	222	52.4%
Disagree	12	2.8%
Total	424	100.0%

Are welcoming to visitors from outside the united states		
Agree	148	34.9%
Neither Agree nor Disagree	261	61.6%
Disagree	15	3.5%
Total	424	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?		
Stand-alone holiday to the Florida Keys & Key West	66	15.6%
Either a stand-alone holiday OR a two-destination holiday with another area	175	41.3%
ONLY as a two-destination holiday with another area	71	16.7%
I would not consider a holiday to visit the Florida Keys & Key West	112	26.4%
Total	424	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	73	17.2%
Interested	97	22.9%
Somewhat Interested	123	29.0%
Not Very Interested	55	13.0%
Not At All Interested	76	17.9%
Total	424	100.0%

Still thinking of the Florida Keys & Key West, the island chain in the United States off the southern coast of Florida comprised of the islands of Key West, Big Pine Key and the Lower Keys, Marathon, Islamorada, and Key Largo.

16. Have you ever been to the Florida Keys and/or Key West?		
Yes	156	36.8%
No	268	63.2%
Total	424	100.0%

17. Which area of the Florida Keys and/or Key West have you visited?		
Key West		
Yes	52	33.3%
No	94	60.3%
I don't know / I don't remember	10	6.4%
Total	156	100.0%

Big Pine Key and the Lower Keys		
Yes	25	16.0%
No	113	72.4%
I don't know / I don't remember	18	11.5%
Total	156	100.0%

Marathon		
Yes	19	12.2%
No	119	76.3%
I don't know / I don't remember	18	11.5%
Total	156	100.0%

Islamorada		
Yes	20	12.8%
No	116	74.4%
I don't know / I don't remember	20	12.8%
Total	156	100.0%

Key Largo		
Yes	33	21.2%
No	106	67.9%
I don't know / I don't remember	17	10.9%
Total	156	100.0%

18. How would you rate the Florida Keys & Key West as a holiday location?		
Excellent	48	11.3%
Good	98	23.1%
Neutral/ Undecided	251	59.2%
Fair	14	3.3%
Extremely Poor	13	3.1%
Total	424	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	20	4.7%
Likely	34	8.0%
Somewhat likely	122	28.8%
Unlikely	128	30.2%
Very unlikely	120	28.3%
Total	424	100.0%

The next questions ask you to think about the State of Florida, in the United States.

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	242	57.1%
Neither Agree nor Disagree	173	40.8%
Disagree	9	2.1%
Total	424	100.0%

Florida's main attraction is really the amusement parks in the Orlando area		
Agree	90	21.2%
Neither Agree nor Disagree	276	65.1%
Disagree	58	13.7%
Total	424	100.0%

Florida's main attraction is really its coastal beach towns		
Agree	130	30.7%
Neither Agree nor Disagree	258	60.8%
Disagree	36	8.5%
Total	424	100.0%

Florida's main attraction is really its metropolitan/city areas		
Agree	49	11.6%
Neither Agree nor Disagree	297	70.0%
Disagree	78	18.4%
Total	424	100.0%

Florida is a place you can visit again and again		
Agree	167	39.4%
Neither Agree nor Disagree	236	55.7%
Disagree	21	5.0%
Total	424	100.0%

There are undiscovered parts of Florida off the beaten track		
Agree	141	33.3%
Neither Agree nor Disagree	267	63.0%
Disagree	16	3.8%
Total	424	100.0%

Florida is mostly clone towns, each just like the other		
Agree	39	9.2%
Neither Agree nor Disagree	297	70.0%
Disagree	88	20.8%
Total	424	100.0%

Florida is somewhere you go for sun holidays		
Agree	259	61.1%
Neither Agree nor Disagree	153	36.1%
Disagree	12	2.8%
Total	424	100.0%

You should consider hurricanes before booking a trip to Florida		
Agree	160	37.7%
Neither Agree nor Disagree	224	52.8%
Disagree	40	9.4%
Total	424	100.0%

Florida offers green holiday travel options		
Agree	101	23.8%
Neither Agree nor Disagree	299	70.5%
Disagree	24	5.7%
Total	424	100.0%

Florida is somewhere you go for water-sports holidays		
Agree	212	50.0%
Neither Agree nor Disagree	199	46.9%
Disagree	13	3.1%
Total	424	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	129	30.4%
The Florida Keys/Key West	106	25.0%
Miami	160	37.7%
The State of Florida as a whole	54	12.7%
Tampa	46	10.8%
Ft. Lauderdale	88	20.8%
St Augustine/Jacksonville	12	2.8%
Ft Myers	10	2.4%
Destin	2	0.5%
Somewhere else in Florida, please specify	3	0.7%
Don't recall seeing advertising	177	41.7%

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	59	13.9%
Somewhat Interested	190	44.8%
Not Very Interested	90	21.2%
Not At All Interested	85	20.0%
Total	424	100.0%

23. Have you ever visited Florida?		
Yes	200	47.2%

No	224	52.8%
Total	424	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	21	10.5%
Neither Agree nor Disagree	95	47.5%
Disagree	84	42.0%
Total	200	100.0%

I want to go back for the more undiscovered areas, small towns and rural areas		
Agree	66	33.0%
Neither Agree nor Disagree	110	55.0%
Disagree	24	12.0%
Total	200	100.0%

I want to go back for the metropolitan/city areas with shopping and nightlife		
Agree	49	24.5%
Neither Agree nor Disagree	107	53.5%
Disagree	44	22.0%
Total	200	100.0%

I want to go back for the beaches and ocean		
Agree	78	39.0%
Neither Agree nor Disagree	97	48.5%
Disagree	25	12.5%
Total	200	100.0%

I want to go back for Florida's theme parks		
Agree	43	21.5%
Neither Agree nor Disagree	114	57.0%
Disagree	43	21.5%

25. How likely are you to consider Florida for a holiday within the next two to three years?		
Very likely	37	8.7%
Likely	44	10.4%
Somewhat likely	131	30.9%
Unlikely	97	22.9%

Very unlikely	115	27.1%
Total	424	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	141	33.3%
Opportunities to relax/de-stress	172	40.6%
New experience(s)	111	26.2%
Unique experience(s) / worth sharing	91	21.5%
Beaches	144	34.0%
Local cuisine/gastronomic experience	93	21.9%
A good deal, trip package, tour opportunity	101	23.8%
Historic sites or sites of religious or ancestral significance	63	14.9%
Ease of entry requirements to the country	47	11.1%
Activities for me and/or my family	72	17.0%
The exchange rate	30	7.1%
Shopping	69	16.3%
Nature encounters/wild-life viewing	71	16.7%
All-inclusive pricing	57	13.4%
Festival(s) or event(s) that I would enjoy	21	5.0%
Visiting friends/family	31	7.3%
Amusement park(s)/Theme park(s)	28	6.6%
Theatre, live performance arts, cultural activities	32	7.5%
Lots of nightlife activity	19	4.5%
Spa services/luxury/pampering	26	6.1%
Green tourism options/carbon neutral eco-resorts	12	2.8%
Water sports – snorkeling, kayaking, paddle boarding	22	5.2%
Warm weather	218	51.4%
Other, please specify	20	4.7%

27. What is your top choice for accommodations when you go on your main holiday(s)?

Vacation/holiday rental	59	13.9%
Well-known brand/chain hotel	141	33.3%
Resort with self-catering accommodations	49	11.6%
Condos / Condominiums	60	14.2%
Boutique hotel/local hotel	46	10.8%
Friend or family home(s)	19	4.5%
B&B	14	3.3%
Campground/Cabin/ Caravan/RV Park	14	3.3%

Other, please specify	22	5.2%
Total	424	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	57	13.4%
February	65	15.3%
March	42	9.9%
April	30	7.1%
May	36	8.5%
June	93	21.9%
July	211	49.8%
August	152	35.8%
September	59	13.9%
October	41	9.7%
November	56	13.2%
December	37	8.7%

29. How much did you spend on your last main holiday?		
€1 - €499	36	8.5%
€500 - €999	18	4.2%
€1,000 - €1,999	16	3.8%
€2,000 - €4,999	12	2.8%
€5,000 - €9,999	2	0.5%
€10,000 & up	1	0.2%
1 - 3,699 kr	7	1.7%
3,600 - 7,399 kr	18	4.2%
7,400 - 14,499 kr	28	6.6%
14,500 - 36,999 kr	33	7.8%
37,000 - 73,999 kr	14	3.3%
74,000 kr & up	0	0.0%
1 - 3,599 kr	5	1.2%
3,600 - 7,299 kr	22	5.2%
7,300 - 14,499 kr	29	6.8%
14,500 - 35,999 kr	34	8.0%
36,000 - 72,999 kr	10	2.4%
73,000 kr & up	3	0.7%
1 - 4,199 kr	0	0.0%
4,200 - 8,29 kr	13	3.1%
8,300 - 16,999 kr	31	7.3%
17,000 - 41,599 kr	37	8.7%

42,000 – 82,999 kr	15	3.5%
83,000 kr & up	6	1.4%
Decline to answer	34	8.0%
Total	424	100.0%
30. How many people are in your household?		
1	115	27.1%
2	192	45.3%
3+	117	27.6%
Total	424	100.0%

31. Children under 17?		
Yes	119	38.5%
No	190	61.5%
Total	309	100.0%

32. What is your current age?		
18-19	8	1.9%
20-29	95	22.4%
30-39	84	19.8%
40-49	72	17.0%
50-59	89	21.0%
60-69	60	14.2%
70+	16	3.8%
Total	424	100.0%

33. What is your current marital status?		
Married or civil partnership	245	57.8%
Single, divorced, widow or widower	161	38.0%
Decline to answer	18	4.2%
Total	424	100.0%

34. What is your total household income?		
€1 - €25,999	35	8.3%
€26,000 - €45,999	28	6.6%

€46,000 - €65,999	16	3.8%
€66,000 - €99,999	8	1.9%
€100,000 - €199,999	3	0.7%
€200,000 & up	0	0.0%
<i>Less than 9999 kr</i>	7	1.7%
10.000 – 19.999	13	3.1%
20.000 – 29.999	14	3.3%
30.000 – 39.999	17	4.0%
40.000 kr & up	27	6.4%
Less than 200.000 kr	17	4.0%
200.000 kr - 399.999 kr	40	9.4%
400.000 kr - 599.999 kr	51	12.0%
600.000 kr - 799.999 kr	39	9.2%
800.000 kr - 999.999 kr	24	5.7%
1.000.000 kr & up	22	5.2%
Decline to answer	63	14.9%
Total	424	100.0%

35. In what area of Scandinavia do you live?

The Capital Region (Denmark)	36	8.5%
Urban area of Copenhagen	9	2.1%
Copenhagen metropolitan area	7	1.7%
East Jutland metropolitan area	48	11.3%
Øresund Region	8	1.9%
Ålesund Region	2	0.5%
Bodø Region	2	0.5%
Greater Bergen Region	8	1.9%
Greater Oslo Region	40	9.4%
Grenland	3	0.7%

Haugesund/Stord Region	4	0.9%
Kristiansand Region	7	1.7%
Larvik/Sandefjord Region	1	0.2%
Lower Glomma Region	2	0.5%
Mjøsa Cities	3	0.7%
Stavanger Region	9	2.1%
Tønsberg Region	2	0.5%
Tromsø Region	11	2.6%
Trondheim Region	14	3.3%
Southern Finland	54	12.7%
Western Finland	36	8.5%
Oulu	13	3.1%
Aland	0	0.0%
Lapland	1	0.2%
Metropolitan Stockholm	65	15.3%
Metropolitan Gothenburg	13	3.1%
Metropolitan Malmö	26	6.1%
Total	424	100.0%