

SALES TEAM STATUS REPORT

PROJECT: FITUR
DATE: January 22-26, 2025
ASSIGNED: Sabine Chilton, Yves Vrielynck
STATUS: Trip report attached

PROJECT: NYC Travel and Adventure Show
DATE: January 25-26, 2025
ASSIGNED: Liana Pyne, Tracy McClellan, Chad Newman, Jordan Upchurch
STATUS: Trip report attached

PROJECT: Chicago Travel and Adventure Show
DATE: February 1-2, 2025
ASSIGNED: Yves Vrielynck, Joshua Cato
STATUS: Trip report attached

PROJECT: Florida Huddle
DATE: February 4-6, 2025
ASSIGNED: Sabine Chilton
STATUS: Trip report attached

PROJECT: Florida Encounter
DATE: February 4-6, 2025
ASSIGNED: Liana Pyne
STATUS: Trip report attached

PROJECT: AAA Travel Marketplace
DATE: February 8-9, 2025
ASSIGNED: Tracy McClellan
STATUS: Trip report attached

PROJECT: Phoenix Travel and Adventure Show
DATE: February 15-16, 2025
ASSIGNED: Yves Vrielynck, Liana Pyne
STATUS: Trip report attached

PROJECT: Los Angeles Travel and Adventure Show
DATE: February 22-23, 2025
ASSIGNED: Sabine Chilton, Joshua Cato
STATUS: Trip report attached

PROJECT: Visit USA Italy Show and Presentations
DATE: March 1-6, 2025
ASSIGNED: Sabine Chilton, Axis Travel Marketing
STATUS: Trip report attached

PROJECT: I.T.B.
DATE: March 3-6, 2025
ASSIGNED: Yves Vrielynck, Joshua Cato, Get It Across
STATUS: Trip report attached

PROJECT: Denver Travel and Adventure Show
DATE: March 8-9, 2025
ASSIGNED: Dive Umbrella
STATUS: Trip report attached

PROJECT: S.F. Bay Travel and Adventure Show
DATE: March 15-16, 2025
ASSIGNED: Joshua Cato, Liana Pyne
STATUS: Trip report attached

PROJECT: Outdoor Adventure Show
DATE: March 22-23, 2025
ASSIGNED: Sabine Chilton
STATUS: Trip report attached

PROJECT: Dallas Travel and Adventure Show
DATE: March 22-23, 2025
ASSIGNED: Tracy McClellan, Chad Newman
STATUS: Trip report attached

PROJECT: Beneath the Sea
DATE: March 29-30, 2025
ASSIGNED: Yves Vrielynck, Dive Umbrella
STATUS: Registration and arrangements complete

PROJECT: Washington, DC Travel and Adventure Show
DATE: March 29-30, 2025
ASSIGNED: Joshua Cato, Chad Newman, Liana Pyne
STATUS: Registration and arrangements complete

PROJECT: Travel Agents Forum
DATE: March 30 - April 2, 2025
ASSIGNED: Liana Pyne
STATUS: Registration and arrangements complete

PROJECT: WTM Latin America
DATE: April 14-16, 2025
ASSIGNED: Sabie Chilton, Yves Vrielynck
STATUS: Registration and arrangements in process

PROJECT: GMITE
DATE: May 6-9, 2025
ASSIGNED: Liana Pyne
STATUS: Registration and arrangements in process

PROJECT: German Sales Mission
DATE: May 11-17, 2025
ASSIGNED: Yves Vrielynck, Get It Across
STATUS: Registration and arrangements in process

PROJECT: World Pride
DATE: May 17- June 8, 2025
ASSIGNED: Joshua Cato, Liana Pyne
STATUS: Registration and arrangements in process

PROJECT: Girls in Wonderland
DATE: May 30-31, 2025
ASSIGNED: Joshua Cato
STATUS: Registration and arrangements in process

FITUR 2025
Madrid, Spain
Jan 22-26, 2025
Sabine Chilton, Yves Vrielynck

We represented Visit Florida Keys at the 45th edition of Fitur, Jan 22-26, which was held at the IFEMA Convention Center in Madrid, Spain. This was our first appearance at the show in the past 15 years. Our booth was located in the USA Pavilion. DMO also present from Florida included Visit Tampa Bay, Visit Lauderdale, Orlando CVB and Experience Kissimmee.

- FITUR is the first appointment of the year and the global meeting point for tourism professionals and the leading trade fair for incoming and outbound markets in Ibero-America. The show format includes three trade days and 2 consumer days and hosts professionals from the tourism sector as well as the public wishing to discover the destinations offered that can be visited at the fair over the weekend. The 2025 edition will include Brazil as a partner country.
- In 2024, total attendance reached 250,000 visitors: more than 153,000 professionals and 97,000 members of the general public (up 13.7% on 2023). 2025 overpassed those numbers.
- During the event, the Visit Florida Keys representatives engaged in detailed discussions about the destination's regions, airlift, accommodations, attractions, events, and recommended travel duration. To provide additional information, travel agents and professionals were directed to our Spanish e-learning program and brochure which was very well appreciated.
- Met new suppliers and customers and strengthen commercial relationships with existing ones, multiplying business opportunities.

- Updated Tour Operators and agents on renovated hotel products helped travel agents plan client visits to the Keys.
- #10 international inbound market for the U.S.A. and the Florida Keys.
- The length of stay is 17 days on average (2 to 3 nights in the Keys) and 23% of all Spanish visitors to the U.S.A. vacation in Florida (daily direct flights to Miami).
- Multiple opportunities to conduct sales, PR and media co-ops to promote the destination.

Key Takeaways:

- Florida Keys and Key West were extremely well-received by trade, media and consumers.
- Florida in general and specifically the Florida Keys are one of the top destinations requested from their clients behind New York and California.
- The event was successful in showcasing the Florida Keys as a viable option for their clients who prefer to vacation in Florida and would consider pre/post cruise vacations. It is recommended to attend Fitur yearly and continue our efforts in this emerging market which is growing.

TRAVEL & ADVENTURE SHOW

New York, NY

January 25-26, 2025

Liana Pyne, Tracy McClellan, Chad Newman

The Florida Keys and Key West exhibited at the 2025 New York Travel & Adventure Show, held January 25-26, 2025, at the Jacob K. Javits Convention Center. In addition to the DMO, several hotel partners attended within the Florida Keys booth including Hawks Cay Resort, Beachside Hotel, Faro Blanco/Courtyard Marathon, Ocean Properties, and the Flamingo Lodge Everglades. The show attracted an estimated 35,000 visitors over its two-day run. This marked a significant increase compared to previous years, with the 2023 show hosting over 21,500 attendees. The Florida Keys & Key West showcased their destination through both a main booth and a dedicated presence within the LGBTQ Pavilion. This dual representation underscored the region's commitment to inclusivity and its appeal to a diverse range of travelers.

The primary booth for The Florida Keys & Key West provided attendees with comprehensive information about the destination's attractions, accommodations, and unique experiences. Visitors had the opportunity to engage with representatives, gather travel materials, and learn about upcoming events in the region. This central location served as a hub for all attendees interested in exploring what the Keys have to offer.

Within the LGBTQ Pavilion, The Florida Keys & Key West highlighted their longstanding commitment to the LGBTQ community. The booth emphasized the area's rich history of inclusivity, including notable events such as the creation of the world's largest rainbow flag in 2003 by Gilbert Baker, which stretched across Key West's Duval Street from the Gulf of Mexico to the Atlantic Ocean. Representatives, including Jordan Upchurch, a board member of the Key

West Business Guild, engaged attendees by discussing the island's welcoming atmosphere and its motto, "One Human Family," reflecting its inclusive spirit.

Liana Pyne, the Director of Domestic Sales for The Florida Keys & Key West, delivered a presentation titled "A Journey Through the Florida Keys" on Saturday, January 25, from 3:00 pm to 3:30 pm at the Destination Theater. Her session provided attendees with insights into the unique experiences and attractions of the region, offering a deeper understanding of what makes the Florida Keys a distinctive travel destination.

In addition to her presentation, Liana Pyne participated in an interview with ABC7's Eyewitness News, where she discussed the benefits of attending the Travel & Adventure Show and highlighted the Florida Keys as a premier travel destination. She shared insights into the hottest destinations and provided viewers with valuable travel tips, further promoting the region's appeal to a broad audience.

Overall, The Florida Keys & Key West's multifaceted participation in the 2025 New York Travel & Adventure Show effectively showcased the destination's diverse offerings and reinforced its reputation as an inclusive and welcoming community for all travelers. It is recommended to participate in the New York, consumer-based travel show in 2026 based on the show's performance and suggest that we request to participate in the NY FAM/TAS program in 2026.

TRAVEL & ADVENTURE SHOW

Chicago, Illinois

February 1-2, 2025

Yves Vrielynck, Joshua Cato

The 2025 Chicago Travel & Adventure Show took place on February 1-2, 2025, at the Donald E. Stephens Convention Center in Rosemont, Illinois. The event featured over 450 exhibitors and attracted approximately 10,000 attendees.

Visit Florida Keys was well represented by having two booths on the show floor led by Josh & Yves, who were accompanied by 6 hotel partners including Beachside Resort, Hawks Cay resort, Flamingo Bay Everglades, Ocean properties, The Keys Collection and Bay Harbor Lodge / Coconut Bay Resort.

The Florida Pavilion showcased multiple destinations, including Greater Miami CVB, Fort Myers, Destin-Fort Walton Beach, Visit Tampa, Visit Panama City, Daytona Beach, and Visit Lauderdale. The pavilion aimed to highlight the diverse attractions and travel opportunities within Florida.

The Dive Pavillion showcased multiple diving destinations and resorts. Our dive booth was represented by Horizon Divers, Captain Hooks and Florida Keys Diver Center. Although this is not a dive specific show, plenty of visitors to our booth showed an interest in snorkeling in the Keys (also provided by the dive operators) and in learning to dive. Certified divers were enthusiastic about meeting with Keys dive shop owners and were taking advantage of the

specials the operators offered. The participating dive operators reported making a considerable number of reservations at the show and expect more dive trips to be booked in the coming weeks. This gave them a quick return on their investment at this consumer show.

Key topics of discussion among attendees centered around:

- **Activities:** Popular activities included diving, snorkeling, kayaking, paddleboarding, fishing, and biking. The presence of knowledgeable staff allowed tailored recommendations based on visitors' expertise.
- **Accommodation & Pricing:** Many attendees expressed concerns about high winter-season rates, with some feeling priced out. An "off-season" recommendation was made for return visitors looking to save money while enjoying the area.
- **Demographics:** The show attracted a wide range of visitors, including families, empty nesters, and pre-retirees, all eager to travel despite price concerns.

Travel logistics, especially regarding direct flights from Chicago's O'Hare, were also a point of interest. Recommendations include a weekend escape or a week-long vacation approach to maximize convenience. Additionally, questions about travel times from mainland airports to various Keys destinations were frequently asked, indicating a strong interest in understanding the logistics of visiting the area.

Overall, the show effectively highlighted the allure of the Florida Keys, maintaining their 'bucket-list' status even for travelers concerned about costs.

FLORIDA HUDDLE 2025

Ocala, Florida

February 3-5, 2025

Sabine Chilton

I represented Visit Florida Keys at the Florida Huddle 2025 Trade Show February 3-5, 2025, which was held at the World Equestrian Center in Ocala. Also present from the destination but exhibiting separately, Davidson Properties, Keys Collection, Ocean properties and Southernmost Resort Collection.

Florida Huddle, a smaller version of IPW where the buyers are strictly focusing on Florida, has been bringing buyers and suppliers together for over 40 years. Now produced by Visit Florida, the show has evolved into a more positive business-oriented atmosphere and the show format has increased to two days of computer generated pre-scheduled appointments based on mutual requests. Once again, this year we had a full list of 40 appointments as well as many walk-ups that were not able to confirm an appointment. The show had great attendance with very qualified buyers featuring Florida as their top destination. Our list of appointments consisted of major Tour Operators, Wholesalers from our primary international markets such as Canada, UK,

Germany, Brazil as well as domestic receptives and OTAs such as AlliedTPro, ATI, Team America, W2M, Hotelbeds, Bonotel, just to mention a few.

Overall, the product managers are very positive regarding 2025. 2024 was a really good year finishing ahead of 2023 and most of them are already above pace for 2025. We are still seeing winter bookings and Easter and summer are shaping up nicely. Within the destination, the Upper and Middle Keys are in as much demand as Key West. The average length of stay in the Keys is 3.8 nights and the demographics include mostly family and couples, year around, depending on their origin. Due to this ongoing success, the trade is managing the high rates of the properties but hope that rates will stabilize as destinations worldwide are now open. I heard from international operators that the USA in general is becoming a very expensive destination, and the Keys are no different. In the past we've heard that the increase in room rate is becoming an issue but now, clients are also raising concerns about dining and attractions 'pricing. Consumers will pay the price, but the quality of products and services must reflect that rate. Other concerns include political and economic uncertainties.

Despite this, with the permanent stress and the uncertainty of the world, the consumers need a relief and will seize the moment to enjoy some well-deserved vacation in a "safe environment" and there is no better play to relax, recharge and rejuvenate than our destination.

The Florida Keys and Key West were, as always, extremely well received by international trade and the domestic buyers. They are pleased with our inventory and the quality of the products. Florida Huddle 2025 will be held in at the Hilton Orlando February 2-4, 2026.

FLORIDA ENCOUNTER

Ocala, FL

February 3-6, 2025

Liana Pyne

The Florida Keys and Key West participated in the 2025 Florida Encounter, a premier industry event produced by Visit Florida, held from February 3-6, 2025, at the World Equestrian Center in Ocala, FL. This show provided an excellent opportunity to connect with hosted meeting planners, who specialize in selling group and meeting programs in Florida. The event was structured around two full days of one-on-one appointments with planners ranging from newcomers to the meetings industry to seasoned professionals actively seeking to place RFPs for the upcoming group and incentive business. Florida Keys properties in attendance included The Keys Collection, Beachside Hotel & Residences, The Southernmost Beach Resort, Marker Resort, and Opal Collection.

The Florida Encounter event allowed the Florida Keys delegation to engage directly with meeting planners, showcasing the wide array of accommodations and activities that make the Keys an ideal destination for group meetings, conferences, and incentive travel. Our conversations focused on highlighting the destination's diverse lodging options, unique experiences, and tailored incentive programs, all designed to appeal to planners looking to provide their clients with unforgettable event experiences.

Key Takeaways from Florida Encounter 2025:

- The event was appointment-based, with a full schedule of 25+ appointments allowing for focused, high-quality interactions with meeting planners from across the country.
- A significant portion of our discussions centered around the Florida Keys' customizable incentive programs, which include unique activities like snorkeling, eco-tours, private sunset cruises, and culinary experiences.
- The Florida Keys offers a range of lodging options from boutique hotels in Key Largo to luxury resorts in Key West, catering to different group sizes and preferences.
- The Florida Keys stand out as a unique destination for meetings due to its combination of stunning natural beauty, year-round warm weather, and a wide range of activities to enhance corporate events.
- Planners were particularly excited about the opportunity to blend work with leisure in a relaxed island atmosphere, making it easier to foster creativity and team bonding.
- The majority of planners were interested in learning more about Florida Keys properties and the potential for future site inspections.
- There were several meaningful connections made that may lead to direct leads and future business, particularly for incentive groups and small to mid-sized meetings.

Attending Florida Encounter 2025 was an invaluable experience for the Florida Keys and Key West, enabling us to connect with a key segment of the meeting planner community and effectively promote the destination's group and incentive offerings. The event allowed us to highlight our diverse accommodations, unique activities, and tailored incentive programs that appeal to planners seeking distinctive experiences for their clients. Given the positive response and the high-quality appointments, it is recommended that we continue exhibiting at future Florida Encounter events. Additionally, participation in more Visit Florida sales activations would further enhance our visibility and business opportunities within this sector.

AAA NE TRAVEL MARKETPLACE

Foxborough, MA.

February 8, 2025

Tracy McClellan

On February 8, 2025, I represented the Florida Keys and Key West at the annual AAA NE Travel Marketplace held at Gillette Stadium in Foxborough, Massachusetts (approximately 22 miles southwest of Boston) which offered attendees an immersive experience to plan their next adventures. The event featured over 60 trusted travel advisors, including cruise lines, tour

companies, and destination representatives, providing exclusive deals and insights into various vacation options. Other Florida CVBs included Orlando, Pensacola, Greater Miami, and Treasure Coast Florida.

Even though it was a significantly snowy weekend with road condition warnings, this show had great attendance welcoming approximately 4000 Attendees who had the opportunity to explore a diverse range of travel options, from all-inclusive beach escapes to guided tours across Europe. The Marketplace expanded its offerings with two presentation theaters offering 30-minute presentations with 24 presenters, allowing for more in-depth sessions on international destinations, cruise vacations, and sun-filled adventures. Special promotions at the show included trips starting at \$435 per person, with potential benefits such as up to \$500 cash back at departure or up to \$1,000 in future travel credits when bookings were made during the event. Guests had the opportunity to win a complimentary three-night stay for two at the Tamarijn Aruba All-Inclusive Resort. The show organizer confirmed that over 250 bookings were made directly at the event with their AAA Team.

Attendees were given a bag at registration from AAA for grab and go items at the event so they were very happy to see our VFK literature and maps as well as our Southernmost Buoy and conch shell stickers and pins to be able to take home and share with their friends and family, especially those who they were going to be traveling with to Florida Keys this summer. Direct flights from Boston Logan International Airport (BOS) through American Airlines and JetBlue Airways to Key West International Airport (EYW) was a very asked about detail with flights operating daily (6 days per week/average 1 flight per day). Other travel options and questions regarding differences between the islands and length of stay recommended were also very common. They also wanted to share a lot of experiences and stories about the Florida Keys with me and asked how things are similar and different to when they visited previously. I had several families call me when I returned to Key West to ask my advice for summer travel and things they had seen online and wanted to verify the location to different attractions.

I recommend that we continue to attend this AAA Travel show as they have a longstanding great reputation in the industry that we continue to partner with for continued success!

TRAVEL & ADVENTURE SHOW

Phoenix, AZ

February 15-16, 2025

Liana Pyne, Yves Vrielynck

We represented the Florida Keys and Key West at the Phoenix Travel & Adventure Show held February 15-16, 2025, at the Phoenix Convention Center. We were the only Florida destination and the only East Coast destination exhibiting at this event.

The event organizers provided us with premium floor placement offering excellent visibility throughout the two-day consumer show. Saturday's format featured a special 30-minute exclusive opening dedicated to travel trade professionals before general admission began.

Throughout the weekend, attendees consistently inquired about the best time to visit the Florida Keys. We dedicated significant time educating visitors about fundamental geographic details,

travel logistics from major airports, and realistic driving times to reach the destination. Many conversations addressed accommodation options across different Keys regions, seasonal events and activities, and recreational opportunities like diving, snorkeling, kayaking, and paddle boarding. Visitors frequently asked detailed questions about typical weather patterns, prime fishing seasons, and recommended stay durations for thoroughly experiencing the destination.

Our interactions revealed that most potential visitors plan six to seven-night stays in the Florida Keys, typically dividing their time between two to three days in the upper/middle Keys followed by three to four nights in Key West. The majority expressed intentions to fly into a major South Florida airport, rent vehicles, and enjoy the scenic coastal drive to the Keys as part of their overall experience.

We encountered numerous previous visitors who enthusiastically shared their past experiences and expressed eagerness to return to the Florida Keys. Additionally, we engaged with many attendees actively finalizing plans for upcoming trips to our destination within the next several months, indicating strong forward booking potential from the Phoenix market.

TRAVEL & ADVENTURE SHOW

Los Angeles, California

February 22-23, 2025

Sabine Chilton, Joshua Cato

We represented Visit Florida Keys at the Travel & Adventure Show on March 22-23, 2025, held at the Convention Center in Los Angeles.

With more than 400 exhibitors, this nation's leading Adventure Travel Show is the largest series of events serving adventure, active travel, eco, nature, cultural, and outdoor tourism, one of the fastest growing niche markets. Visitors can discover amazing world travel destinations, attractions, activities, resorts, products, luxury goods and services and participate in trip giveaways, cultural entertainment and lectures from travel experts.

The show format included two days. On the first day, the show was exclusively open to the travel trade industry for the first hour and then to the consumers. The use of a backdrop representing our different activities gave the visitors an excellent and immediate geographic location of the Keys and helped them visualize the beauty and uniqueness of our wonderful destination as well as its many components and resources. We answered many questions about accommodation, the variety of events, activities such as fishing, kayaking, and mostly diving and snorkeling.

The main asked questions remaining "when is it the best time of the year to visit the Florida Keys; how many days do I need to visit all the Keys; and how much time does it take to drive from Miami to Key West?" The crowd was very enthusiastic and eager to learn about the Keys.

This show is very popular and one of the heaviest-attended shows in Southern California. The show attracts thousands of tourism industry professionals and consumers who come to plan and book their next vacation.

California is one of the fastest growing travel markets for the Florida Keys. Every year the number of Californian visitors grows tremendously. The Florida Keys attracts visitors of all ages, all interests and all social conditions. The crowd was well educated, well informed and seeking new experiences. Demographics included mostly couples 50 and over. Travel inquiries ranged from departure within the next few weeks to itinerary planning in spring and fall. The length of stay averaged 5 to 7 nights mostly arriving from Miami and driving down to the Keys. Our destination generated a lot of interest; we also were the only Florida destination present. The attitude towards the destination was exceptional. Everyone we talked to was very familiar with our destination, and about 80% had visited the Keys in the past few years or were planning a trip this upcoming year. We got many compliments from previous visitors, which can't wait to come back. From people going on a cruise and extending their stay to the Keys, to visitors planning a getaway, honeymooners, empty nesters, divers, families, bucket list enthusiasts, all are looking forward to their future visit or return.

Due to the success and the high interest generated we encourage our partners to look into these series of events and join us on the destination booth as we will be participating in another full series in 2026.

SHOWCASE USA-ITALY & PRESENTATIONS

Turin, Florence, Italy

February 28- March 4, 2025

Sabine Chilton, Anita Skibieli (Axis, UK)

We represented Visit Florida Keys at the Visit USA Italy Showcase in Turin, Italy, February 28-March 2, 2025. This was the fifteenth time that the Florida Keys opted to participate in this business-to-business event organized by the U.S Commercial Service in Milan and the Visit USA Association Italy.

The market for Italian tourism to the United States continued its strong growth and rebound in 2024 with 1.1 Million Italian arrivals to the US, a 15% increase from 2023. of Projections for 2025 are very positive and the outlook foresees a continuous increase of Italian tourism to the US.

Data from the U.S. Department of Commerce & National Travel Tourism Office show the top states most visited by Italians: New York takes most arrivals followed by California and Florida in third position (top 10 international market for the Florida Keys).

Over two days, the format of the show included 40 pre-scheduled appointments meetings with Tour Operators and a handful of media.

Thanks to past years' in-market training, the knowledge of our destination and product awareness is phenomenal. We distributed the Italian edition of our Travelution magazine and promoted our Italian website as well as our Italian e-learning program which raised full appreciation of these efforts.

The Italian traveler is focused on summer travel and beaches. Key West is the major draw for the Italians. We took the opportunity to educate both the agents and tour operators about other options within the Keys. While visiting Florida for 10/12 days, the Italians will mainly arrive at Miami airport, rent a car and will spend 2 to 3 nights in the Keys. Another fact is that Italians have a very large honeymoon travel market. Considering what is supposed to be a 'once in a lifetime' event, this type of travel enjoys a longer vacation time at a higher cost. The Keys fit very well in this market with their abundance of unique lodging options from small boutique hotels, B&B's, historic inns to high-class resorts.

Meeting with the top Italian producers for our market within a two-day time frame has shown to be highly effective. This year, in combination with this show, we also had the opportunity to host 2 very successful events in partnership with Konrad Travel, one of our top Italian Tour Operators. Our presentation and reception in Turin included 60 travel agents and the one in Florence, 30 travel agents.

Due to the success of those events, participation in cooperation with our UK agency is recommended at next year's edition in combination with presentations in several cities.

ITB - Trade
Berlin, Germany
March 4 – 6, 2025
Yves Vrielynck

The Florida Keys & Key West participated in what is promoted as the world's largest travel trade exhibition. ITB is held March 4 – 6, 2025 in Berlin Germany. As partners we had representatives from Ocean Properties and Hawks Cay Resort.

Visit Florida Keys, together with a handful of other Florida DMOs, were part of the USA pavilion, totaling over 70 USA exhibitors, a 10% increase over last year.

Our German Sales office, Get It Across, assisted in obtaining trade appointments and media exposure at the show. With 40 appointments, this was a record-breaking year.

The co-op marketing efforts that we executed this past winter with the tour operators have proven successful. Double-digit increases over last year's booking season were often mentioned in our meetings. The outlook for the summer 2025 and fall of this market is bright.

However, any further bookings have come to an almost complete stop after the infamous meeting between our President Trump and the Ukrainian President Zelenskyy. We will have to closely

monitor the current sentiment in Europe and review our co-op marketing initiatives at IPW, Chicago in June. Only then can we decide on how to align our marketing efforts to ensure a successful 2025 winter booking season.

With the increase in our ADR over the past couple of years we have seen a shift from the German tour operators positioning the Keys as a luxury destination, moving us from 'mass market' to a more select, upscale product. Therefore 'millennials' and 'empty nesters' with considerable disposable income have been targeted, they are not dependent on school vacations and a visit to the Florida Keys in the fall and early winter can give them 'some' reprieve from the high rates. Yet, the operators have ceased complaining about the rates they are given and beyond our control. With conveying this upscale message, they are also aware that their commissions are substantially higher.

The German market is a critical international market and showing up year after year at this show has given us the opportunity to build strong relationships with the major players. It is imperative to continue the support of our long-term partners, and we should have presence at ITB in 2026. As always, we welcome our hotel partners to join us.

ITB Berlin – LGBTQ+
Berlin, Germany
March 4-6, 2025
Joshua Cato

The Florida Keys and Key West were prominently featured in the LGBTQ+ Tourism Pavilion at ITB Berlin 2025, showcasing the region's strong commitment to diversity and inclusion in the travel industry. This year marked Visit Florida Keys' debut at the event, alongside other new exhibitors, reinforcing ITB Berlin's dedication to highlighting global LGBTQ+ travel destinations.

Making their debut at this year's event, Visit Florida Keys joined other new exhibitors such as Il Capri Hotel from Italy, REDD – Red Española De Destinos Por La Diversidad from Spain, and ACE Hotel Kyoto from Japan.

Key events within the pavilion included the inaugural Gender Equality Award ceremony on March 6, 2025, and the LGBTQ+ Networking Reception on March 4, both of which fostered valuable industry connections. The Educational Hub also hosted insightful discussions on LGBTQ+ travel safety, emerging destinations, AI, and sustainability.

Throughout the event, I engaged in several conversations with LGBTQ+ travel trade professionals who expressed strong interest in the Florida Keys as a destination. Additionally, Albert Jennings facilitated introductions to key industry members and demonstrated strong support for this market segment. He has several initiatives in development that warrant further consideration.

Overall, the Florida Keys and Key West's participation at ITB Berlin 2025 successfully reinforced the region's position as an inclusive and welcoming travel destination.

TRAVEL & ADVENTURE SHOW

Denver, Colorado

March 8-9, 2025

Dive Umbrella for Yves Vrielynck

Visit Florida Keys exhibited in the Dive Pavilion at the Travel and Adventure Show held March 8-9, 2025, at the Denver Convention Center in Denver, CO. The participating dive operators were Horizon Divers and Captain Hooks.

While this show is one of the smaller events in the national series, attendance was strong throughout the two-day consumer-focused exhibition.

Market Insights

Colorado represents a significant opportunity for Florida Keys tourism, as the state has the highest concentration of certified divers in the country. Their unique status as a landlocked region creates distinctive travel behaviors:

- Colorado divers typically undertake at least one international dive trip annually
- Primary destinations include Caribbean Islands, Hawaii, and Mexico
- Travelers benefit from generally affordable airfare to these locations

Challenges & Solutions

Several knowledge gaps were identified among Colorado residents regarding the Florida Keys:

1. Geographic Unfamiliarity: Most attendees were unaware of the Overseas Highway connecting the island chain
2. Accommodations misconception: Many believed lodging was limited to Key West rather than distributed throughout the Keys
3. Activity Diversity: There was a perception that scuba diving is the only significant attraction

Our team addressed these misconceptions through educational conversations highlighting:

Multiple access points via Miami or Key West airports

- Over 300 accommodation options across all islands
- The wide variety of activities beyond diving

An additional challenge was the perception that winter travel to Florida is prohibitively expensive. We countered this by emphasizing that summer and fall represent the prime diving seasons in the Keys, which encouraged many attendees to reconsider their travel timing.

Outcomes

The show proved successful for our participating dive operators, who reported:

- Numerous on-site bookings
- Strong prospects for additional reservations in the coming weeks
- Positive return on investment for participation

Our staff's firsthand knowledge as Florida Keys residents proved particularly valuable in providing credible, personalized recommendations based on each visitor's experience level and interests.

TRAVEL & ADVENTURE SHOW

Santa Clara, CA

March 15-16, 2025

Liana Pyne, Joshua Cato

The Bay Area Travel & Adventure Show, held at the Santa Clara Convention Center on March 15-16, 2025, welcomed an estimated 22,000 travel enthusiasts eager to explore new destinations. Visit Florida Keys (VFK) proudly represented The Florida Keys & Key West as the only Florida exhibitor, engaging with attendees alongside representatives from destinations such as City of Roswell, NM; Maui, HI; Choctaw, OK; and Anchorage, AK.

Media Exposure & Recognition

VFK was prominently featured in an ABC NEWS 7 San Francisco interview, where representatives Joshua Cato and Liana Pyne highlighted the region's unique attractions. The interview gained additional exposure through MSN, achieving an approximate media value of \$2.5 million with an audience of 30,000+ viewers in the Bay Area.

VFK's Featured Sessions & Key Highlights

Welcome Breakfast & Presentation (March 15, 9:30–10:30 AM)

- Attended by 65 travel agents, offering an in-depth overview of the Florida Keys & Key West.

Destination Theater Presentation (March 16, 2:00–2:30 PM)

- A dynamic session that showcased the Keys' distinct offerings, attracting an engaged audience.

Key Presentation Highlights:

- Five Distinct Regions – Key Largo, Islamorada, Marathon, the Lower Keys, and Key West, each offering unique experiences, from diving and eco-adventures to cultural and historic attractions.
- Diverse Activities – Rich in history, arts, theater, museums, shopping, fine dining, and entertainment.
- Travel Logistics – Emphasized accessibility, safety, and transportation options within the Keys.

Attendee Engagement & Consumer Insights

- Demographics: The event attracted a mix of affluent travelers, adventure seekers, and family vacation planners, primarily from California and the West Coast.

- Florida Keys Recognition: Approximately 35% of attendees had previously visited the Florida Keys, while 50% expressed interest in planning a future trip.

Trip Planning & Length of Stay: Among potential travelers:

- 40% were considering a visit within the next 12 months.
- 60% were interested in stays of 5+ days, with a strong preference for multi-island experiences.
- Consumer Feedback: Attendees praised the Keys for its laid-back atmosphere, natural beauty, and diverse activities, reinforcing its appeal as a must-visit destination.

Industry Experts & Educational Opportunities

The event featured 60+ educational seminars across four theaters, with renowned travel experts such as Rick Steves and Chris Burkard, offering valuable insights on travel trends, emerging destinations, and best practices for planning memorable vacations.

Overall Impact

The Bay Area Travel & Adventure Show provided an excellent platform to showcase The Florida Keys & Key West, generating strong interest among both travel agents and consumers. With valuable media exposure, engaging presentations, and positive consumer feedback, VFK successfully positioned the Keys as a premier travel destination for future visitors.

OUTDOOR ADVENTURE SHOW

Montreal, Canada

March 22-23, 2025

Sabine Chilton

For the first time, I represented the Florida Keys and Key West at the Outdoor Adventure Show in Montreal, Canada, March 22-23, 2025 (Our last time in Montreal was in 2017). Western US and Caribbean destinations were well represented and included Miami, Fort Lauderdale and Fort Myers for Florida destinations.

The Outdoor Adventure & Travel Show is the best attended consumer show that brings together buyers and sellers of outdoor adventure products & services. This is a fantastic niche market attracting a highly passionate audience who love the outdoors, have disposable income, enjoy learning about new destinations and products and are open to new adventure activities and pursuits. Also held in Toronto, Vancouver and Calgary, these 2-day event series are Canada's largest adventure shows with over 200 exhibitors featuring travel, health, fitness, sports, camping.

Those outdoor enthusiasts attended the show for the latest travel trends, the newest products, and services. They are committed to a lifestyle that involves sports and activities of all kinds, from paddle sports and adventure travel to biking, adventure racing, snorkeling, scuba diving, kayaking, fishing, camping and water / mountain sports. They are "doers", not watchers, embrace life and nature with passion and challenge themselves physically and emotionally to achieve the highest levels of satisfaction. Used to mountains, forests, rivers, waterfalls and rainy days, the perspective of warm waters, coral reefs, tropical scenery and especially warm sunny days make the Florida Keys and Key West the perfect exotic destination for them.

The attendees of the show represent a mass market demographic with strong representation in the 35 to 65 years old range. Visitors, mostly couples, are keen multi-sport enthusiasts and are in the prime of their spending years. Whether novice or expert, this market spends substantially on travel. These consumers have the means and the desire to invest in a wide variety of products and services that will enhance their experience and assist them in reaching their personal goals.

During the show, I distributed a variety of collaterals including our Travelution brochure in French and pointed out our French website. I answered many questions about accommodation, activities and attractions. Camping and Eco-tourism were the main focuses, and we encountered a lot of questions regarding biking, snorkeling, diving, fishing and our 2 National Parks.

Considering the current political climate, I have to say that everyone was very gracious even if 50% of them are generally very concerned and are delaying their visit to the US. There were also concerns about the I94 form and the mandatory registering for stays of 30+ days starting April 11th.

Canada continues to deliver the largest inbound travel market to the United States. Canadian visitation to Florida has been rebounding nicely since Covid to reach 3.82M in 2024 (2019 visitation was 4.09M). However, due to the decline in value of the Canadian dollar (40%) and the current political turmoil this could change.

Canada is also our number one international market. Ontario and Quebec account for two-third of the Canadian overnight visitors followed by British Columbia. In general, from October to April, about 47% of Canadians will take a trip to the USA and 40% of those will go to Florida as they need to escape their harsh winter and prefer destinations which offer nature, beaches, outdoor sports, and sightseeing which explain their attraction to the Florida Keys. Some visitors already enjoyed, loved the Keys and couldn't wait to go back and others were planning a trip as we ranked high on the "bucket list". Some visitors discovered Key West via a cruise and liked it so much that they decided to come back and visit all the Keys. Others are "snowbirds" residing 6 months around Hollywood or Sarasota and come to the Keys on "vacation for a few days". Regarding accommodation, smaller properties such as bed and breakfast have their preferences, especially while in Key West. Another option is condos and villas for visitors to enjoy our destination for a longer stay and the favorite one for the French Canadians is camping, either with tent or RVs and spending a few days to a few months. Most Canadians are multiple times return customers and for the ones who haven't been there yet, we are a must see / bucket list destination.

The Florida Keys and Key West were well received. All the comments about our destination (not the current state of affairs) were extremely positive with the Keys being considered the most beautiful part of Florida and referred as "tellement beau" with a recognition rate over 90%.

In the past few years, we have seen a shift on booking habits for the Canadians. They are very familiar and comfortable with Florida; it is a second home away from home. This is why it is so important to attend consumer show as 89% of Canadians book through Expedia and Travelocity.ca. We encourage our industry partners to consider the importance of this market as Canada is our Number One international market.

DALLAS TRAVEL & ADVENTURE SHOW

Dallas, TX

March 22-23, 2024

Chad Newman, Tracy McClellan

We represented the Florida Keys and Key West at the 14th annual Dallas Travel & Adventure show held at the Dallas Market Hall, March 22-23, 2024. Mark Calibo from Opal Resorts joined us in our booth. Other Florida CVBs present included Ft. Lauderdale, Pensacola, Crystal River, and Destin/South Walton Beach.

The Travel & Adventure Show Series continues to be one of the leading consumer travel events in the United States. Held annually in major cities nationwide, these events offer travel enthusiasts a vibrant platform to discover new destinations, engage directly with industry experts, and plan their next getaway.

Drawing affluent and educated attendees, the show series drives more than \$5 billion in annual travel and hospitality spending. Attendee demographics reflect a highly desirable market, with 86% aged 35 or older in peak earning years. Further demonstrating the quality audience, 89% hold college degrees, and 80% report annual incomes exceeding \$100,000.

The 2025 Dallas Travel & Adventure Show was held March 22-23 at the Dallas Market Hall. Now in its fourteenth year, this event attracts consumers, travel trade professionals, travel advisors, and media representatives from across the Dallas metro area. The attendee profile for the show is an ideal match for the Florida Keys and Key West traveler, with 84% earning over \$100,000 annually, including 62% surpassing the \$150,000 income mark. Reflecting significant purchasing power, 74% of Dallas attendees indicated they typically spend more than \$5,000 on travel annually.

The Dallas event featured diverse exhibitors from the US and the Caribbean, including prominent destinations, tour companies, cruise lines, and various travel service providers. A major feature of the show is three dedicated on-floor theaters, offering targeted content to enhance their travel planning:

The Travel Theater hosted renowned travel celebrities and industry experts, including notable figures like Andrew McCarthy, a celebrated travel writer, actor, and director, and Scott Mayerowitz, a leading reward points expert. The Destination Theater provided focused, half-hour workshops spotlighting specific locations, enabling deeper engagement with prospective travel plans. Finally, the Savvy Traveler Theater delivered essential, practical advice, helping travelers optimize their experiences and budgets.

With over 6.5 million people, Dallas / Fort Worth ranks in the top 10 DMAs for population and household income over 100K (6.3 % of the population has a net worth of over 1 million dollars). 60% of Dallas travel consumers report spending over \$5000 in travel, and 71% are in their peak earning years (35-65 yrs. old). Add to that direct air service from the fourth-busiest airport in the U.S., Dallas/Fort Worth International, and you have a major contributor to inbound traffic to our destination.

As with all the Travel and Adventure Shows, the show format includes two consumer days, with the first 30 minutes of the first day dedicated exclusively to travel trade members. We distributed a variety of collaterals and answered many questions about accommodation, events, and water

activities such as snorkeling, diving, fishing, camping, and kayaking. Our National and State Parks were very popular activities, and we answered technical questions about the weather, driving times, differences between the islands, and the length of stay necessary to visit all the Keys. This show has a slower pace and focuses more on education, planning, and booking. Our brand remains strong as over 90% of the booth visitors had either been to the Keys already, heard of the Leys, or hoped to go there one day; the crowd was well-educated, well-informed, and seeking authentic experiences. Travel inquiries ranged from immediate departure to itinerary planning for the rest of the year. The length of stay averaged long weekends, with arrival at Key West Airport, and 5 / 7 nights, mostly arriving in Miami or Fort Lauderdale and driving down to the Keys. Many visitors also discovered our destination through cruises that stopped in Key West. They prefer to vacation at our destination in spring, fall, and winter. The reaction to the direct airlift by American Airlines from DFW International Airport to Key West was very well received and surprising to a number of people.

The Dallas Travel & Adventure show continues to be a very successful opportunity for the destination and is right in line with our target audience.

We encourage our hotel partners to join us in 2026 as we plan to participate in another full series for maximum exposure in our key feeder markets.

SALES CALLS / TRAVEL TRADE ASSISTANCE / EVENTS

Sales Call – Riviera Travel – Christian Locke, Head of Long Haul Product

Axis caught up with Christian who was brought on board at the start of the year to grow Riviera's longhaul touring programme, the tour operator having initially focused on growing its river cruising and shorthaul escorted touring operations post-Covid.

Christian says he is opening to growing the US programme and we talked of potential JMAs in future, on the proviso they created some new solus product, which is he open to pursuing.

Now is the perfect time to be targeting Riviera as they are due to hold a product meeting in early March to discuss new destinations and tour products, including in the US, for inclusion in the Q4 2026 and 2027 programmes.

In conclusion, Riviera are definitely one to watch and to support, not least as they are growing fast, have a strong trade presence, and they have a large, active database of loyal customers to cross sell to.

Travel trade newsletter – various

Axis created and distributed the latest quarterly travel trade newsletter, highlighting some of the destination's unique selling points, from accommodation and new visitor attractions to major calendar events, including a story encouraging take up the agent training platform Key Lime Academy.

Sales Call – TTG, Mark Frost, Sales Manager

Axis has a call with TTG to identify what opportunities there may be for Visit Florida Keys to target the travel agents for next fiscal. We will include our recommendations if appropriate in our marketing plan for FY25/26.

Sales Call – BA Holidays, Jake Hill, Partnership Marketing Executive:

Correspondence with BA Holidays as they have invited us to participate on their annual Visit Florida campaign. Reviewed campaign but it does not align with our budget or target audience, as publication they would feature us was The Sun, tabloid. Have let Jake know and asked him to keep us informed of any other campaigns that may suit us better.

Event – Coordination for Showcase Italy and Konrad Roadshow: Axis finalised all aspects of Showcase USA Italy and the Konrad Roadshows. The events take place from 28th February.

Event – Coordination for Swansons Consumer Show: Axis coordinated and finalised all details to attend the Swansons Consumer Show taking place in Malmo Sweden on 1st March. Swansons is one of Swedens most important tour operators for the USA and this event brings



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all their consumers together across a one day show to be inspired and book their trip to the USA.

Event – Coordination for Visit Florida UK Roadshow: Axis has been coordinating our attendance at the Visit Florida Roadshow which will take us to Edinburgh and London to meet with travel agents to educate them on the Florida Keys, then culminating in a product manager networking event to strengthen relationships and product. The event takes place Mid March. Further details will be reported in next months report.

Event – Coordination for Visit USA Unite Tradeshow: Axis conducted meeting scheduling throughout February for the Visit USA Unite Tradeshow. Activity included reaching out to tour operators and reviewing best potential meetings for development of the destination. An update on the event will be given in March report. Event takes place second week of March.

Event – Ferie for Alle: Axis represented Florida Keys at the largest Danish consumer show – Ferie for Alle in conjunction with our tour operator partner USA Rejser. It was a 3 day event starting on the 21st February continuing over the weekend. Around 60,000 consumers attended.

- There was a lot of interest in the Florida Keys & Key West with people keen to learn more about itinerary suggestions, activities to do, when is the best time of the year to visit the destination.
- 80% of visitors to our booth had heard of the destination and knew of the location.
- On the first day, the event was predominantly attended by older visitors, many of whom were pensioners. A significant portion of them took time to ask questions, curious about the various regions of the Keys. Notably, over half of those enquiring were familiar with the Florida Keys, with half of them having visited the region themselves. Their questions ranged from the best travel tips to the unique experiences the Keys had to offer.
- The election of Donald Trump has influenced some Danish people's travel decisions to Florida and the Florida Keys, with a segment of travellers reconsidering their visits due to concerns over political climate and social tensions during his presidency.

USA Rejser has already reported that they have a lot of leads from the show which includes the Florida Keys. We will follow up with them end of March for an update on booking numbers.



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Event – Lusso Travel, Sarah Gibbons, Product Manager : Axis received the opportunity to attend a travel agent roadshow with Lusso Travel focussing on the USA. Lusso Travel are a high end tour operator with good product for the Florida Keys. This event will be a great opportunity to meet with their top sales agents to educate them on the Florida Keys and inspire sales. Submitted proposal to HQ which was signed off and we have subsequently signed up.

JOINT MARKETING & CONSUMER CAMPAIGNS

JMA – Freedom Destinations – Rowan Hill, Marketing Manager; Richard Webb, Senior Marketing Executive

Following the January sign off on this JMA proposal, Freedom has been working on adding new online content on a Landing page, which Richard offered Axis a sneak peak of (and we subsequently shared with head office).

This new Landing Page includes an expanded offering of both hotels and holiday options in the Florida Keys.

Once completed, including adding some blog content, and some background info on travelling in the Keys, Freedom will start work on the promotional aspect of the JMA, pushing their expanded programme of product.

JMA proposal – THG Holidays – Stam Tzafos, Product Manager USA & Europe

Axis initially pursued the idea of a JMA with THG Holidays in partnership with the third party Secret Escapes, designed to showcase two ‘special offer’ tours centred on the Florida Keys, flying into Miami, including hire car and some attractions. Unfortunately, the proposal stalled as Secret Escapes walked away from the idea, citing falling US holiday sales.

Axis and THG are currently pursuing the idea of a proposal in partnership with Holiday Pirates instead, and await receipt of some more info from Stam on how that would work, in practice, and the potential outcomes we could expect, before making a decision to proceed or not.

Moreover, Axis is meeting Holiday Pirates at UNITE USA on March 11, in London, and can factfind directly there, with Stam from THG also in attendance.



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TDC INTERNAL

1. Axis continues to reach out to Tour Operators to obtain valuable insight on the market as well as offer support, be that training, images, or itinerary suggestions.
2. Axis continues to push out and encourage agent sign up for the online training.

OVERVIEW OF FULFILMENT REQUESTS

Trade Fulfillment in February 2025:	905
Consumer Fulfillment in February 2025:	19
Fulfilment via VUSA Website in February 2025:	0

Month	Consumer	Trade
October 24	18	530
November 24	15	165
December 24	7	405
January 25	19	1,610
February 25	19	905
March 25		
April 25		
May 25		
June 25		
July 25		
August 25		
September 25		
Total:	78	3,615
Total FY 12/13	334	435
Total FY 13/14	367	408
Total FY 14/15	495	301
Total FY 15/16	554	614
Total FY 16/17	404	358
Total FY 17/18	499	217
Total FY 18/19	342	170
Total FY 19/20	231	55
Total FY 20/21	261	3
Total FY 21/22	310	0
Total FY 22/23	337	163
Total FY 23/24	258	106
Total FY so far 24/25	78	3,615
Grand Total	4,470	6,445

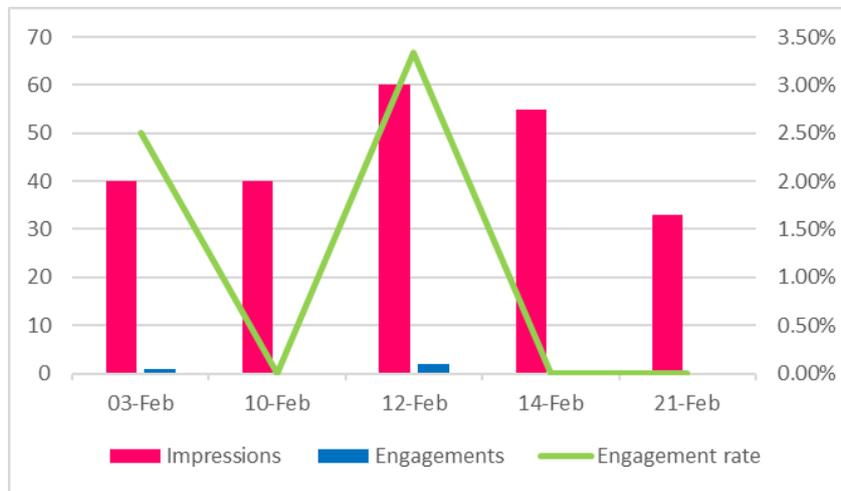
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SOCIAL MEDIA

X (Twitter):

Date	Impressions	Engagements	Engagement rate
03-Feb	40	1	2.50%
10-Feb	40	0	0.00%
12-Feb	60	2	3.33%
14-Feb	55	0	0.00%
21-Feb	33	0	0.00%
Total	228	3	1.16%



Top Impressions & Engagement Rate:



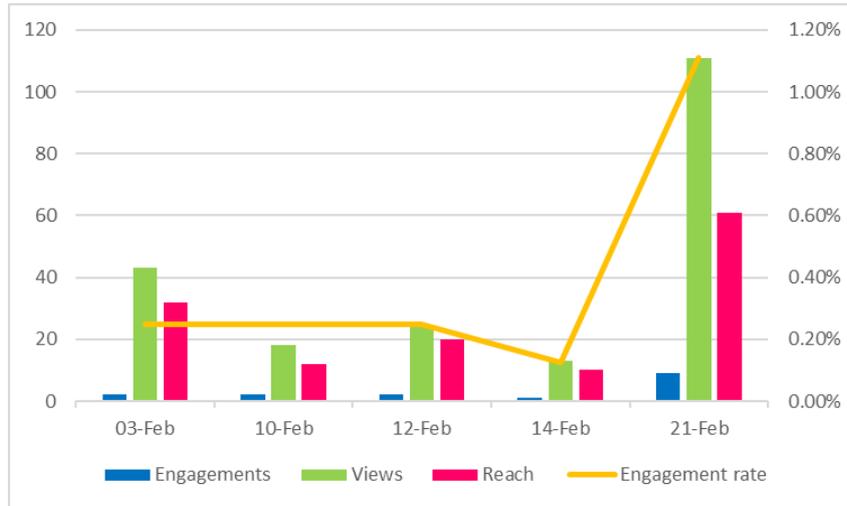
Other Posts:



Instagram

Posts:

Date	Engagements	Views	Reach	Engagement rate
03-Feb	2	43	32	0.25%
10-Feb	2	18	12	0.25%
12-Feb	2	24	20	0.25%
14-Feb	1	13	10	0.12%
21-Feb	9	111	61	1.11%
Total	16	209	135	0.39%



Top Views & Engagement Rate:

axistravelmarketing Day 1 of the Ferie for Alle Consumer Show in Herring, Denmark, is officially in the books! 🟢 It's been an exciting start with amazing crowds, and lots of energy. Can't wait to see what tomorrow brings! 🌟🔥 #Herring #ConsumerShow
Edited · 3 w

Liked by robbiedobbiedoo and 8 others
21 February

Other Posts:



T&E REPORT

Operators report growth in late business and ‘bucket list bookings’

- Holiday bookings are coming in closer to departure despite being in the midst of the peak summer booking period.
- That is according to Kuoni UK managing director Mark Duguid who said: “It’s a very late market. Kuoni has not traditionally been in the lates space, but we’re seeing a large amount of late business.”
- Speaking at a Travlaw Big Tent Event in London in January, Duguid said: “We’re pivoting to meet demand to complex, experiential destinations in Africa, India, the Far East, Australasia and North America. We have customers explicitly asking for bucket list destinations they want to tick off.”
- At the same time, he identified value for money as “another big trend”, saying: “The top demand coming through is for value. We need to offer value for money.”

Barrhead Travel hails record start to February after ‘Back to the Floor Day’

- Barrhead Travel is celebrating its record start to February after members of the agency’s senior management team returned to frontline sales roles for the group’s annual ‘Back to the Floor Day’.
- Trading on Saturday (February 1) was 58% up compared with the first Saturday in February last year, with the weekend finishing 43% up year on year.

More families swerving summer for annual break, says Advantage

- The Advantage Travel Partnership has pointed to a growing number of families choosing to take their annual break outside of the summer holidays.
- The consortium said more families are instead looking for Easter deals and cooler temperatures outside of the peak months, with Easter holiday bookings up 15% compared to the same period last year.
- Its recent survey found “impressive growth” in the family market with the percentage of bookings with at least one child increasing from 21% across its members in 2024 to 25% this year.
- Advantage also pointed to “strong momentum” in long-haul travel across its membership with a 5% shift from short-haul trips to long-haul for this summer.
- This uptick was attributed to many families discovering long-haul travel can be more cost-effective than European destinations during school holidays, particularly in destinations like Thailand and the Far East where local costs are not as high.
- The most popular long-haul destinations for Easter were Orlando, Mexico and New York.
- The Advantage Travel Partnership also highlighted Orlando as “a destination to watch” which is set to have “a bumper year”, following the opening of Universal Park Epic Universe in May.

Carrier celebrates 27% rise in sales of complex trips

- Luxury tour operator Carrier has reported strong January sales, with bookings for complex touring products up 27% year on year and the average booking value growing by 12% year on year.
- There has been a 20% rise in the number of bookings worth £100,000 or more compared with January last year.
- The operator also noted significant demand for late bookings, with 50% of bookings having a departure date before April. February was the most popular departure month.
- The leading destinations for late bookings are Spain and Dubai, with the United Arab Emirates recording a rise of 10% year on year.
- Within the complex touring side of the business, sales have doubled for Australasia and the US, Carrier said, while bear experiences in Canada are also proving popular.
- Cruise sales have risen by 16% and there has also been increased demand for “very high-end” tours of Japan, which will not officially be added into the tour operator’s programme until later in the year.
- The average booking value for the high-end Japan tours is about £80,000, with the average duration being 21 nights.

Gold Medal creates fam trip hub for agents to share travel experiences

- An online fam trips hub has been created by Gold Medal and dnata Travel Group UK’s B2B specialist brands Pure Luxury, Cruise Plus and Incredible Journeys.
- The platform features blogs from educational trips and has been designed to support agents to expand their knowledge through in-depth reviews from first-hand experiences, personal stories and the sharing of top tips.
- The sister brands hosted more than 35 trips for more than 200 agents in 2024.

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- The brands' fam trip strategy focuses on providing agents with the tools, expertise and confidence to sell holidays to specific destinations and resorts.

US travel reforms urged ahead of 'historic' surge in demand

- US airports can expect "Thanksgiving-like" travel extremes over 50 days next year – doubling to 100 in 2028 – but the current air travel system is not built to handle such a surge in travellers.
- The warning came in an industry report identifying urgent steps needed to ensure president Donald Trump delivers a "golden age of travel" ahead of the 2025 Ryder Cup, 2026 World Cup, 2028 Olympic and Paralympic Games and America's 250th anniversary.
- The Commission on Seamless and Secure Travel, comprised of former government officials along with private sector experts from airport management and investment entities, called for immediate action to improve the country's "outdated" air travel system to cope with the expected rise in demand.

Rising long-haul demand boosts Kuoni peaks performance

- Kuoni has reported one of the best January and early February sales periods since pre-Covid 2019.
- Strong demand for long-haul holidays for the year ahead has seen sales rise 14% ahead of last year's peaks, according to worldwide operator.
- The Maldives is the top selling destination, with Thailand, Mauritius, Sri Lanka, Bali, Antigua, Vietnam, Malaysia, the US and South Africa in the top 10.
- Other trending destinations include India, Tanzania, Australia and the Seychelles, which are all seeing a rise in bookings since last year.
- Multi-centre trips with more complex itineraries are becoming more popular. Kuoni also noted an upturn in two and three centre trips with Sri Lanka and Thailand being the most popular for 2025.

Airline passenger demand soars 10% in January, IATA reveals

- Global airline passenger demand soared by 10% at the start of the year with heightened load factors – highlighting "persistent" supply chain issues facing the aviation sector, according to IATA.
- The figures for January released by the airline trade body show that overall capacity was up by 7.1% year-on-year with a record load factor for the month of 82.1% – up 2.2 percentage points.
- International demand rose 12.4% compared to January 2024, while capacity was up 8.7% and the load factor rose 2.7 percentage points to 82.6% – another all time high for the month.
- All regions showed growth for international passenger markets in January, with Asia-Pacific demand particularly strong.



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Brand USA appoints Leah Chandler as CMO

- Brand USA has appointed Leah Chandler as chief marketing officer.
- Chandler was most recently chief marketing officer of Discover Puerto Rico and has more than 20 years' experience in branding, advertising and destination marketing.
- The appointment is the latest following the arrival of Fred Dixon as chief executive of the destination marketing organisation in summer 2024.
- In her new role, Chandler will oversee the Brand USA's brand, advertising, content, digital marketing and research efforts.



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I. Marketing Activities

I.a Training / Education

1. Meiers Weltreisen DER Academy, November 2024 – November 2025

GIA secured a FKKW feature within the new training module of the B2B platform “DER Academy” highlighting the relaunch of the “Meiers Weltreisen” as DER’s more upscale long haul specialist brand. The FKKW are the only US destination specifically highlighted in the North America section and includes a banner linking to the German FKKW E-Learning, a video, an image gallery, a special recommendation and a product shoutout. By the end of December 2024, a total of 399 travel agents had completed the course which will remain online for a full year.

2. VUSA Switzerland Seminar, January 2025

GIA has registered for participation in the Swiss Visit USA Seminar on behalf of VFK, the premier B2B training event in Switzerland, which took place at the end of January. The full day event consisted of a combined marketplace and workshop setup, where the FKKW were able to hold seven presentations to appr. 2/3 of the 210 participating travel agents. The Florida Keys shared an “island” together with the CVBs of Bradenton and Florida’s Spacecoast.

Photos of the event can be found under the following link: <https://we.tl/t-MUqvKsWXUC>

I.b Shows / Events

1. ITB Berlin, March 4-6 2025

VFK participated again in this year’s edition of ITB 2025, the world’s largest tourism tradeshow, which took place in Berlin from March 4-6. The VFK booth was part of the larger USA pavilion and was organised with support from GIA, who pre-scheduled an almost full slate of 40 appointments with key tour operators, niche players, marketing partners and other important industry members. In addition, we were able to secure 8 walk-up appointments. A full lead report has been put together by GIA and forwarded to the VFK sales department. The Florida Keys delegation included also representatives of the Hawk’s Cay Resort, as well as Ocean Properties & Resorts. In addition, VFK also included a counter at the LGBTQ pavilion in hall 4.1, where LGBTQ Sales Manager Josh Cato attended and was able to network with key LGBTQ players from the US and international destinations.

Feedback from the majority of the German speaking tour operator on the current situation was pretty much similar across the board: Strong early booking window up until mid/late January for summer 2025 until there was a sudden drop in requests noticeable at the end of January / early February, which most attributed to the political situation and to economic uncertainties. Very few cancellations were reported on the positive side, but everyone was fairly wary of the upcoming challenges.

Photos of the show can be found here: <https://we.tl/t-MUqvKsWXUC>

2. TDC Sales Mission, May 18-23

GIA is currently planning a sales mission through the German cities of Cologne, Düsseldorf, Frankfurt, Hannover and Hamburg to meet with some key tour operators and industry partners, as well as train reservation and sales staff at several important tour operators, which will take place in mid May. During the week, we are also planning to participate in a B2C Florida event with CANUSA in Hamburg, one of our top3 tour operators.

3. Queer Games Cologne, June 6-9

GIA has secured sponsorship at this year's rendition of the international LGBTQ sports tournament Queer Games, which will take place in Cologne in early June and which will draw hundreds of LGBTQ+ athletes from all over the world to attend various sports competitions. The Florida Keys sponsorship will include logo presence on the tournaments website, as well as brochure distribution and banner placement at selected event locations throughout the four day sports event.

4. IPW 2025 Chicago, June 14-18

VFK has confirmed that GIA will attend international tradeshow IPW in Chicago in June on behalf of VFK to join meetings with German, Austrian, Swiss and BeNeLux tour operators during the show. As usual, GIA will help with appointment coordination and selection ahead of the show.

5. Pridefest Cologne 2025, July 4-6

GIA has once again confirmed VFK's participation in the annual Pridefest in Cologne in July 2025 with a shared booth right by main stage on Heumarkt in cooperation with local LGBTQ specialist tour operator Teddy Travel.

6. Gay & Lesbian City Festival Berlin, July 19-20

GIA is currently registering for a VFK booth at the Schwul-Lesbisches Stadtfest, which will take place in Berlin in July. This is one of the largest LGBTQ+ community events in Germany's capital Berlin. This year, we will partner with Pink Globus, a newly launched LGBTQ travel agency, based in Berlin, owned by LGBTQ influencer Phil Hollister, who has traveled to the Keys before.

7. Edeltravel Client Event, September 13

On September 13, VFK will be part of a Florida themed client event in Dusseldorf, organised by luxury specialist tour operator Edeltravel. This event will be part of a joint luxury promotion together with the CVBs of Fort Lauderdale and Naples, Marco Island & the Everglades.

8. Postponed: Faszination Fernweh Client Event

VFK had originally committed to be part of a Florida & New England client event organised by tour operator specialist Faszination Fernweh, which was scheduled to take place in December. This event had to be postponed due to the main organizer being on extended sick leave. We hope to be able to execute the event at a later point during the current fiscal year.

II. Travel Trade Marketing

1) Belgian Market Campaign with Joker Reizen

GIA has agreed to participate in a comprehensive Florida promotion together with Belgian tour operator Joker Reizen as well as Kennedy Space Center and St. Pete / Clearwater. The promotion includes a [dedicated blogpost about the FKKW](#), a special Florida fly drive voucher [giveaway promotion](#), several social media [and email newsletter features](#) and brochure distribution opportunities at B2C events throughout Belgium. The campaign has launched in August and ran through February 2025.

2) Online Campaign with Jan Doets Reizen

GIA has agreed to participate in a stand-alone FKKW campaign together with Jan Doets Reizen, one of the most important tour operators in the Netherlands. The campaign consists of two elements, a stand-alone FKKW email newsletter, as well as a [targeted social media campaign](#). The stand-alone email newsletter was sent out to a database of 22,000 selected subscribers with a strong North America affinity in early September.

The newsletter can be found here: <https://we.tl/t-1JPq95GB7H>

The social media campaign is centered around the creation of a FKKW themed Reel which was scheduled to be run and heavily promoted on all Meta platforms in mid/late September. Unfortunately due to the impacts and related news following the Hurricanes Helene and Milton, we decided to postpone the launch of the reels campaign to November.

3) Amerikareisen.at Promotion

Following BrandUSA Travelweek TDC has confirmed participation in a promotion together with Austrian tour operator brand Amerikareisen.at (which is now owned by German TO America Unlimited). The campaign is a joint promotion together with the CVBs of Fort Myers and Naples/Marco Island and will center around the creation of a new fly drive itinerary featuring two overnights in each destination. To further provide inspiration about the three destination, Amerikareisen will create individual microsites for each destination. To promote the tour, there will be a dedicated newsletter about all three destinations, which will be sent out to their database of loyal, high level clients (8,500 contacts), as well as targeted print mailing which will go out to 5,000 clients. The print mailing only goes out twice a year and the new Florida tour will be one of only six itineraries that will be featured in that mailing.

The print mailing layout can be found here: <https://we.tl/t-1JPq95GB7H>

4) Deluxe Market Campaign CRD Select

GIA has confirmed participation in a deluxe market promotion together with CRD Select, the newly launched upscale brand of North America specialist CRD. The campaign is in cooperation with the CVBs of The Palm Beaches and Naples/Marco Island and is centered around the creation of a [new luxury itinerary](#) highlighting the three destinations with three overnights each. The promotion will also include a feature in the [newsletter of luxury deals platform Secret Escapes](#) (300,000 subscribers), a print advertorial in a Munich daily newspaper (942,000 readers), as well as a feature in the [CRD Select email newsletter](#) and a dedicated virtual training with CRD Staff on December 19. The advertorial has been published in February, the newsletters have been published in February, too.

The advertorial can be found here: <https://we.tl/t-MUqvKsWXUC>

5) Flamingo Company Fernreisen, Berlin

Online specialist Flamingo Company Fernreisen approached the FKKW for a [prize raffle promotion](#) leading up to Christmas at no cost to the FKKW in return for a high value giveaway. TDC was able to secure hotel overnights from Key West Historic Inns for this social media based promotion. However, due to the marketing person falling sick for most of December, the promotion ultimately had to be delayed and is now taking place in mid March.

Creatives of the campaign can be found here:

- [Ankündigung](#) (Reel)
- [Sunset Hours](#) (Post)
- [Lust auf die Keys](#) (Reel)
- [Lovely Stays](#) (Story)
- [USA for Foodies – Key Lime Pie](#) (Post)
- [Gewinnspiel](#) (Post)

6) Edeltravel Luxury Campaign

To further establish the FKKW as an upscale destination, we are partnering again with Edeltravel, one of Europe's premier luxury specialists, who supported our KlassikRadio campaign in spring 2024. We are working together with the CVBs of Naples & Marco Island as well as Fort Lauderdale for whom Edeltravel will build a new luxury fly drive. The fly drive will be promoted through a month long SEO campaign, 10 second spots in the Edeltravel showroom, a full page advertorial in Edeltravel's client magazine "Essence", online features on Edeltravels blog and newsletter. In addition, all three destinations will be hosting an evening event at Edeltravels showroom in Dusseldorf where selected clients will be invited.

While the promotion had generally been approved by all Florida partners, Edeltravel eventually had to announce that they will not be able to organize the B2C event in the first quarter of 2025, which was prerequisite for the participation of Naples. In February, Naples was able to reconfirm participation, so the campaign is now moving again and will be launched in Q2/2025, with the consumer event taking place on September 13.

7) POSTPONED: Argus Reisen Online Coop

In December, GIA was in the process of hashing out details for a B2C marketing cooperation including multiple website, newsletter features and a prize raffle campaign together with North America specialist tour operator Argus Reisen. Unfortunately, following the decision of the TDC to revise the marketing plan and halt all previously non-approved marketing activities in January/February 2025, we had to inform Argus Reisen that we are not able to confirm our participation at this point and have to potentially pick this opportunity up at a later time

III. VFK Internal

1. Ongoing discussions about new fiscal procedures with county clerks
2. Continued discussions about ongoing and planned marketing activities
3. Finalised planning for ITB 2025 and followup
4. Budget review and personell discussions with TDC staff
5. Coordination of FIT 2024 Roomnight Survey
6. Execution of 2025 Summer Inventory Report
7. Coordinated input for inhouse PR representation for remainder of FY25

IV. Travel Trade Assistance

GIA sent out a mailing to 1,200 industry contacts in Germany, Austria and Switzerland, as well as selected BeNeLux contacts to coordinate ITB appointment scheduling.

1. CRD International, Hamburg
Coordinated last details for joint luxury promotion
2. Edeltravel, Dusseldorf
Coordinated details for planned joint luxury promotion
3. Amerikareisen.at, Hannover/Vienna
Finalised input and last assets for joint marketing campaign with Austrian TO
4. CANUSA, Hamburg
Discussed potential consumer event with multiple Florida partners during Sales Mission in May
5. America Unlimited, Hannover
Followed up on potential larger scale marketing promotion for 2025/26
6. TUI, Hannover
Followed up on potential larger scale marketing promotion for 2025/26
7. DERTOUR, Frankfurt
Followed up on potential larger scale marketing promotion for 2025/26
8. Expedia Media Solutions, Cologne
Discussed potential marketing opportunities with OTA Expedia in the German speaking market
9. TUI TravelStar, Hannover
Followed up with travel agency association about potential joint webinar in Q2

10. FVW Medien, Hamburg
Discussed potential virtual training event together with trade publisher FVW Medien
11. Argus Reisen, Göttingen
Discussed details for potential standalone marketing coop with to Argus Reisen
12. Flamingo Company Fernreisen, Berlin
Coordinated details and assets for prize raffle promotion with Berlin based special Flamingo Company Fernreisen and Historic Inns of Key West
13. Journaway, Leer
Discussed potential marketing campaign as part of ITB Followup
14. Sokrativ, Witten
Discussed potential affinity marketing campaign together with sustainable brand Bracenet
15. Knecht Reisen, Windisch (CH):
Discussed potential marketing opportunities with Swiss tour operator as part of ITB followup
16. Connoisseur Circle, Vienna (AT):
Followed up about potential media partnership with luxury magazine Connoisseur Circle
17. Pink Globus, Berlin:
Discussed cooperation for LGBTQ city festival in Berlin with new local LGBTQ travel agency
18. AmerikaNu, Den Bosch (NL):
Discussed potential advertorial campaign together with Dutch tour operator
19. Reisebüro Timmermann, Unna:
Sent bulk shipment of Florida Keys collateral to travel agency for distribution to clients
20. Kuoni Reisen, Zurich (CH):
Received request for support of individual visit to FKKW by Swiss sales agents of tour operator Kuoni

V. OVERVIEW of fulfillment requests

2025	DISTRIBUTION VIA INFOX, GIA & EVENTS	
Month	Consumer	Travel Industry
January	113	4
February	224	5
March		
April		
May		
June		
July		
August		
September		
October		
November		
December		
TOTAL	337	9

VI. German Market Update

German Travel Sentiment

(prepared by Albert Jennings, March 17, 2025)

During ITB 2025 the GIA team had three extremely full days of appointments in Berlin. The weather was unseasonably warm, the trade show had never had as many exhibitors as this year, and over 100,000 travel trade professionals attended the show. I will be preparing more complete German Market Notes for March, 2025, but have been asked by several clients specifically about what the current sentiment is for travel to the USA.

Tour Operators at ITB 2025 selling North America all painted a very similar picture with regard to bookings:

- Travel to the US was booked strongly in the fall months of 2024. Many people took advantage of early booking specials. North American tour operators had a strong turnover foundation for summer 2025.
- As of February 2025 very few – if any – new bookings were coming in for travel to the US for summer 2025. Usually tour operators continue to take summer bookings for the USA throughout the spring.
- No cancellations for summer travel to the USA have been received, which is good news.
- Bookings for Canada have literally gone through the roof. Very strong summer 2025 bookings for Canada, inventory will be very tight in many popular locations

It should be noted that the USD has dropped almost 6 cents in value over the past two weeks. The USD traded at EUR 1.03 at the end of February. After the most recent round of tariff announcements the dollar has dropped to EUR 1.09, making travel to the USA less expensive.

There is constant coverage of the executive orders and proclamations made daily from the White House. With regard to tourism, the cuts to the FAA and to the NPS are the most concerning for travel planners. Is flying safe in the USA? Will the national parks be open and providing services in summer 2025?

Above all, Germans are concerned that they might have issues when arriving to the USA and not allowed into the country. On all national media there are stories of Germans being stopped at the border and taken into custody (<https://www.spiegel.de/ausland/usa-deutscher-familienvater-in-abschiebehaft-a-7e1ae68c-c4c5-4d3d-8e15-e1daad7addd1>). This is the worst type of negative influence that can happen. One tour operator at ITB said that clients were concerned about their ESTA application. Stories like these of Germans with legitimate green cards for the USA being stopped and incarcerated simply scare potential US travelers.

Today the administration made travel ban announcements affecting upwards of 40 countries world-wide. This of course contributes to additional worries or trepidation about flying to the USA and being allowed in.

With the daily barrage of startling domestic and foreign policy, a pall of complacent cynicism seems to descend upon us all. Something new will be surely be announced that will tip our blood pressure once again. One tour operator does not expect new bookings for summer 2025, but expects early booking requests / pricing quotes for summer 2026 to come in even earlier – like in May, 2025.

Germany's new government is extremely pro-European in the face of unknown military and economic cooperation with the United States. Germany faces necessary reforms in many of its antiquated structures, but not disruption and dismantlement as currently experienced in the USA.

Germans spent more on travel EVER last year world-wide, and as I reported the previous months, bookings are very strong for 2025. Germans continue to save their money in order to splurge on vacation, and Germans will be bouncing all over the globe again this year. Thank you for your continued support of our hugely robust travel market.