

# FLORIDA KEYS TRENDS



# 2017 Visitors Trends



- Ongoing TDC Overnight Visitor intercept surveys conducted throughout the Florida Keys
- Experience includes over 20 years of designing, conducting, and analyzing reporting
- Utilize a custom designed questionnaire
  - September and October did not have valid sample size
  - November sample was sufficient for all districts except 2
  - December and full quota for all districts

# Where are the Domestic Visitors From



State you are living in			
	2017	2016	Diff
<b>Florida</b>	31.2%	25.3%	5.9%
<b>Illinois</b>	8.4%	7.1%	1.3%
<b>California</b>	5.9%	5.6%	0.4%
<b>Georgia</b>	4.5%	3.4%	1.2%
<b>Michigan</b>	4.2%	5.3%	-1.1%
<b>New Mexico</b>	4.1%	3.3%	0.8%
<b>Alabama</b>	3.2%	1.7%	1.5%
<b>So Carolina</b>	3.1%	1.2%	1.8%
<b>Texas</b>	2.8%	3.0%	-0.2%
<b>New York</b>	2.7%	3.8%	-1.1%
<b>No Carolina</b>	2.5%	1.0%	1.4%
<b>New Jersey</b>	1.8%	1.5%	0.3%

# Who Are Our International Tourists

Country	Total All Quarters					
	2017 All Estimated Visitors	2016 All Estimated Visitors	% increase over 2016	Rank 2017	Rank 2016	Place Change
CANADA	340,600	333,400	2.1%	1	1	0
GERMANY	123,000	143,300	-16.5%	2	2	0
FRANCE	70,300	73,300	-4.3%	3	4	1
UNITED KINGDOM	70,100	90,200	-28.7%	4	3	-1
ARGENTINA	43,300	41,800	3.5%	5	6	1
CHINA	43,300	48,400	-11.8%	6	5	-1
NORWAY	31,100	25,900	16.7%	7	12	5
DENMARK	30,500	31,000	-1.6%	8	7	-1
ITALY	25,700	28,400	-10.5%	9	8	-1
BRAZIL	23,300	26,600	-14.2%	10	10	0

# Overall Satisfaction with Keys Vacations remains very high

99% of 2017 Visitors  
rated their satisfaction  
with their Keys vacation  
4 or 5 out of 5  
compared with 98% of  
2016 visitors



# Trip Planning

- Visitors in 2016 planned significantly further ahead than 2017 Visitors
- In 2016, 23% planned 6+ months in advance; in 2017, 7% planned 6+ months in advance (down 16 points)

How far in advance make decision to visit Keys?			
	2017	2016	Diff
<b>1 Week</b>			
Count	294	244	
Column %	9.3%	6.8%	2.5%
<b>2-4 weeks</b>			
Count	1180	904	
Column %	37.4%	25.1%	12.3%
<b>1-3 months</b>			
Count	748	894	
Column %	23.7%	24.8%	-1.1%
<b>4-6 months</b>			
Count	687	691	
Column %	21.8%	19.2%	2.6%
<b>More than 6 months</b>			
Count	218	835	
Column %	6.9%	23.2%	-16.3%
<b>NA/Do not recall</b>			
Count	26	31	
Column %	0.8%	0.9%	-0.1%

# Accommodations

- Hotels/Motels/resorts remained about the same both years (52%-53%) and remained the primary choice
- B&B's, Guest Houses and Vacation Rentals were used by 45% of visitors (up 2 points from 2016)
- Travel websites (33%) and Reservations by phone (46%) were used the most often to make reservations
- In 2017, 13% of visitors made a direct phone call to the property for their reservation (same as 2016)

# Visit and Stay Trends

- More visitors stayed 4-7 nights in 2016 than 2017 yet slightly more stayed 8 or more nights in 2017
- Fewer people are coming to the Keys for Recreation/Vacation (-14%); an increasing proportion visiting Friends/Family (+12%)

Nights spent in Key West			
	2017	2016	Diff
<b>1 - 3 nights</b>	9.8%	9.4%	0.4%
<b>4 - 7</b>	48.7%	55.6%	-6.9%
<b>8 or more</b>	41.5%	35.0%	6.5%

Which one of the following best describes your trip?			
	2017	2017	Diff
<b>Recreation/vacation trip</b>	71.6%	86.0%	-14.4%
<b>Visiting family/friends</b>	21.4%	9.2%	12.2%
<b>Business/Pleasure combined</b>	4.3%	2.5%	1.8%
<b>Convention or meeting</b>	1.4%	0.4%	1.0%



# Friends/Family and Advertising top influencers

What influenced you to first think FL Keys for this trip?			
	2017	2016	Diff
Friend/family recommendation	31.7%	39.0%	-7.4%
Advertisement seen	27.5%	14.2%	13.2%
TV show/article seen	9.0%	9.0%	0.0%
Travel show/travel agent	6.8%	16.5%	-9.8%
Online review/blog article	7.1%	4.1%	3.0%
Been here before	10.2%	8.3%	2.0%
Always wanted to go here	4.0%	2.9%	1.0%
Activity/event you wanted to do	1.4%	2.0%	-0.6%

- Advertising was a key influence in their decision to visit surpassed only by family and friend recommendations
- Repeat Visitation continues to increase; from 8.3% in 2016 to 10.2% in 2017

# Experiences Being Sought

## EXPERIENCES BEING SOUGHT

	<u>2016</u>	<u>2017</u>	<u>+/- dif.</u>
Relax and Escape	95%	96%	1%
Go Scuba Diving	12%	21%	9%
Go Fishing	21%	38%	17%
Adventure/Kayaking	88%	88%	0%
Culture, Arts and History	86%	57%	<b>-29%</b>
Night life, Live entertainment	88%	65%	<b>-23%</b>
Better Climate	92%	84%	<b>-8%</b>
New Experiences	93%	93%	0%
High Quality Accommodations/Services.	91%	91%	0%
Safe and Convenient travel	93%	97%	4%
Good value; Special deal	93%	91%	<b>-2%</b>
Family Friendly	73%	76%	3%
Experience romance	57%	56%	<b>-1%</b>
Have a Green Vacation	46%	43%	<b>-3%</b>

# Visitors Owning a Second Home in Florida

- 7% of 2016 Visitors owned a second home in Florida
- 11% of 2017 Visitors owned a second home in Florida
- Second homes owned by visitors to Florida were spread across six major markets in Florida:
  - Orlando 28%; up 12% from last year
  - Ft. Lauderdale 25%; up 10 points from 2016
  - West Palm Beach 20%; up 6 points from last year
  - Miami 14%; down 13 points from last year
  - Tampa area 7%; unchanged from 2016
  - Ft. Myers/Naples area 3%; down 8 points from 2016

Do you own a second home in FL?			
	2017	2016	Diff
<b>Yes</b>			
Column %	10.9%	7.3%	3.6%
<b>No</b>			
Column %	89.1%	91.6%	-2.5%

# Transportation Behavior



- The most significant change in transportation behavior was the greater use of personal vehicles (7% in 2015; 20% in 2016; 37% in 2017; +30 points % overall)
- The proportion of visitors who flew directly into Key West decreased from 17% in 2016 to 14% in 2017
- In 2017, more than two-thirds (67%) had visited the Keys in the past three years; 47 percent of 2016 visitors were repeaters, an increase of 20 points

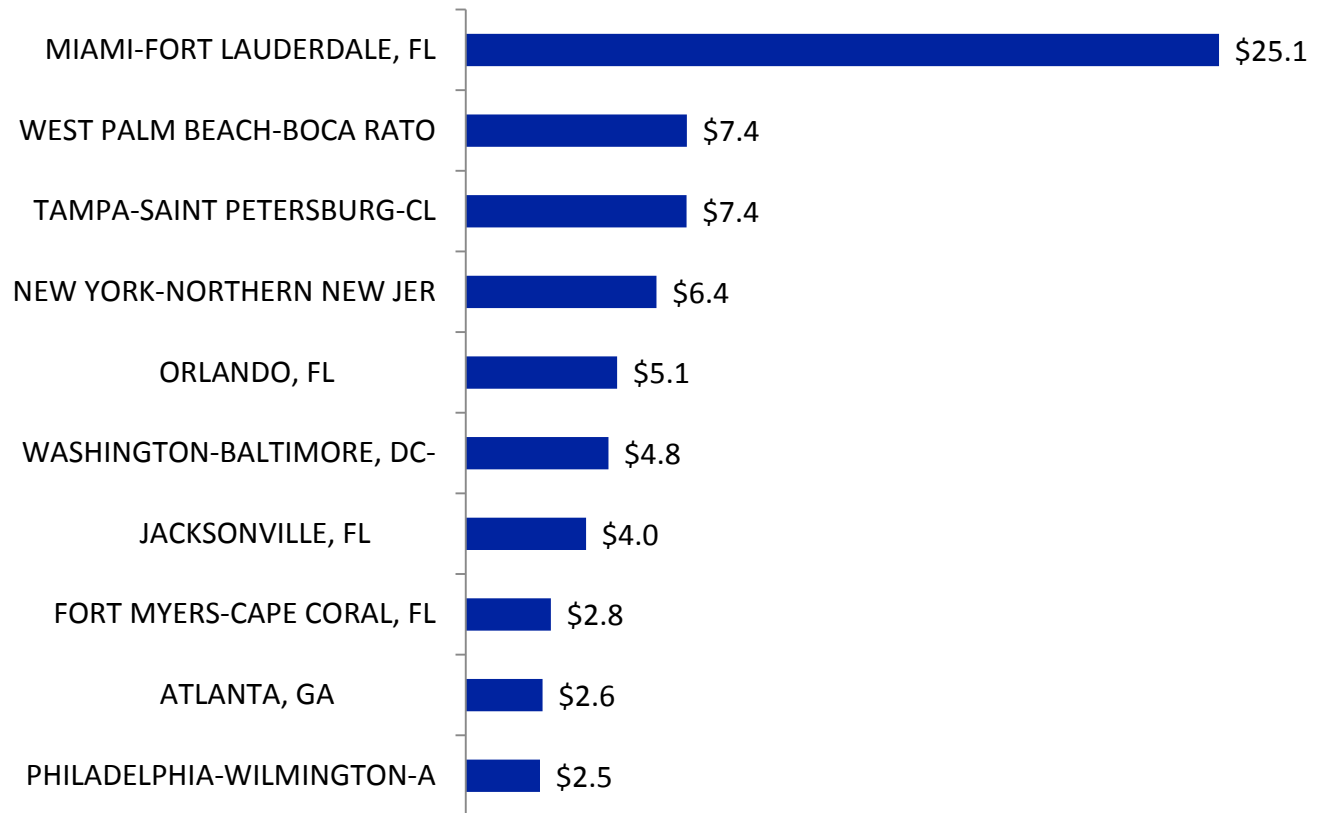
### Top Source Markets Searching Next 90 Days

Region	Source Market Rank	Source Market - State	Search Demand %	YOY Change Demand %
US	1	FL	13.37%	17.17%
US	2	NY	9.12%	2.70%
US	3	NC	7.82%	-4.98%
US	4	PA	7.78%	-8.57%
US	5	GA	4.81%	14.76%
US	6	OH	4.38%	5.28%
US	7	IL	3.92%	-1.01%
US	8	SC	3.70%	22.05%
US	9	TX	3.53%	-2.21%
US	10	MI	3.42%	-2.56%

Source Market - Country	Search Demand %	YOY Change Demand %
US	96.41%	-1.54%
CA	1.09%	17.82%
GB	0.73%	15.83%
DE	0.70%	4.65%
FR	0.20%	-11.45%

# Our Summer Visitors by Visa Spend

Top Originating MSAs by Spend Amt (\$M US)



# New Air Service Announcement

American Airlines

- Key West to Dallas
- Starting in Summer 2018
- Seasonal service  
(June 9 – Sept 1)

E 170 Regional Jet



# Hotels on and off-line as of March 30

## Overall % On-line

DAC I 92%

DAC II 73%

DAC III 64%

DAC IV 70%

DAC V 82%



# THANK YOU

To download our research reports, visit:

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