

# 2021-2022 Marketing Plan



**VISITFLORIDA**<sup>®</sup>





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# Overview



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## ABOUT VISIT FLORIDA

VISIT FLORIDA is a public-private partnership between the State of Florida and Florida’s tourism industry. It serves as the caretaker for the Florida vacation brand and has been inspiring and driving travel to Florida for 25 years

As a vital part of Florida’s economy, the tourism industry was responsible for welcoming 79.8 million visitors in 2020 – significantly down from the record 131.4 million visitors in 2019, a decline wholly attributable to the COVID-19 pandemic. Based on the most recent economic impact study in 2019, Florida visitors contributed \$96.5 billion to Florida’s economy and supported over 1.6 million Florida jobs. According to the Florida Office of Economic and Demographic Research, for every \$1 the state invests in VISIT FLORIDA, \$3.27 in state tax revenue is generated.

Each year, the Florida Legislature appropriates public funding to be allocated for tourism marketing. VISIT FLORIDA is required to match this public investment dollar for dollar by partnering with the state’s tourism

industry through cooperative advertising campaigns, promotional programs, and other innovative marketing ventures.

VISIT FLORIDA operates the state’s four official Welcome Centers and partners with thousands of businesses who represent the breadth of Florida’s tourism industry – small businesses as well as some of the industry’s most iconic companies, such as Busch Gardens Tampa Bay, Disney Destinations, Hilton, LEGOLAND Florida Resort, SeaWorld Parks & Resorts Orlando, and Universal Orlando Resort.

Together with its state partners, VISIT FLORIDA has built an economic development program that has proven to be one of the most successful in the history of Florida. Each community has the necessary tools to support a vibrant and profitable tourism industry. During times of prosperity and times of crisis, VISIT FLORIDA builds and protects the Florida tourism brand and promotes travel to all areas of the state, ensuring that Florida remains one of the top destinations in the world.

## STRATEGIC PLAN

In 2020, representatives of the Florida tourism industry collaborated to establish a set of shared ideas intended to inspire and align the entire industry. This project consisted of extensive survey work, interviews with industry leaders, and workshops at Florida’s premier tourism conference. The strategic plan is the result of that effort and will guide Florida’s tourism industry through 2024.

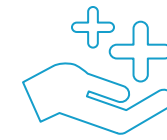
<b>PURPOSE</b>	Brighten the lives of all.
<b>VISION</b>	To establish Florida as the No. 1 travel destination in the world.
<b>MISSION</b>	To enrich the quality of life in our communities.
<b>VALUES</b>	Make an impact. Work purposefully and live passionately. Persist.

Learn more about VISIT FLORIDA: [VISITFLORIDA.org](https://www.visitflorida.org)





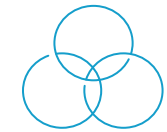
## MARKETING PRINCIPLES



### CREATE VALUE & ADD VALUE

Every VISIT FLORIDA program or initiative must create and add value for travelers and for industry Partners. If the industry can produce a program at the same

cost and with the same impact, there is no reason for VISIT FLORIDA to invest resources in the program. VISIT FLORIDA programs must provide the Florida tourism industry a strategic advantage and must inspire consumers with valuable information or a valuable service.



### SOMETHING FOR EVERYONE, NOT EVERYTHING FOR EVERYONE

There is a tendency in membership organizations to stick to the “Fairness Doctrine” – build programs to the lowest

common denominator and provide the same benefits to all members in all cases. The result is often a marketing structure that tends toward mediocrity.

VISIT FLORIDA represents an industry that is remarkable in its breadth and diversity and a “one-size-fits-all” approach simply will not work. VISIT FLORIDA has made a strategic decision to prioritize efforts on valuable programs that are good for Florida. We strive to provide programs that work for all Partners, but we recognize that not all programs will be a good fit for every Partner.



### SUSTAINING FLORIDA AND FLORIDIANS

Promoting the Sunshine State also requires that we protect it – our local cultures, our great outdoors.

VISIT FLORIDA will support tourism businesses across the state to ensure that the sustainability of our precious natural resources and vital infrastructure is a priority. Our residents, our visitors, and our industry partners deserve no less.



### QUALITY VS. QUANTITY

Scale matters, but impact matters more. The impact of a promotion on consumer behavior is more important than the number of people that the promotion reaches. VISIT FLORIDA is

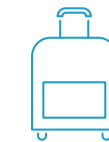
committed to delivering high-quality innovative programs that give Florida a competitive advantage. These programs will be thoroughly vetted, measured, and optimized to ensure they maximize the impact of every dollar spent.



### DIGITAL FIRST

Constant technological advancement has left the world of marketing in a state of permanent transformation. In order to ensure that VISIT FLORIDA thrives in the future, it must be a

marketing company that thinks digital first. We will invest in platforms, partners, and people who understand how technology will evolve and can provide VISIT FLORIDA a competitive advantage as a destination marketer.



### TRAVELER-CENTRIC

The goal of all VISIT FLORIDA efforts is to deliver visitors to the state. Our ability to be successful requires a comprehensive understanding of Florida’s visitors and potential travelers.

Prioritizing the traveler helps VISIT FLORIDA deliver greater results for our Partners and ultimately the residents of Florida.



### DATA-DRIVEN

In order for VISIT FLORIDA to compete in a hyper-competitive landscape, every decision must be data-driven. Priority will be placed on

programs that can be measured and optimized and can provide data that continuously improve our ability to attract potential visitors.

## FLORIDA TOURISM: LEADING FROM THE FRONT

Before COVID-19 upended the global tourism economy, Florida had established its most dominant lead ever in 20 years of measuring domestic market share. Then the pandemic stole loved ones and redefined our ideas of safety and freedom; shut down travel and closed borders; and battered the economy, wiping out businesses and jobs.

But in a year that felt much longer, VISIT FLORIDA and the Florida tourism industry held fast. We imagined the next normal and reimagined our messages to consumers. Flying was out, but road trips were in. We could be distanced but still achieve the transformative benefits that only a vacation could produce.

Thanks to the unshakeable resilience of Florida’s tourism industry – its more than 1 million workers and the team at VISIT FLORIDA – we are ready to lead the Sunshine State into its recovery and to turn the page toward a more optimistic future.

Fortunately, we are starting this comeback from a position of strength: a desirable vacation product and a strategic marketing platform that aligns the collective interests of the Florida tourism industry. In other words, through the collaboration of VISIT FLORIDA and its tourism industry partners, we continue advancing toward our stated vision of Florida as the No. 1 tourism destination in the world.

Let’s go.



Castillo de San Marcos, St. Augustine





## A WORLD STILL IN FLUX

In March 2020, COVID-19 cut the power to the global economy. Tourism, Florida's leading industry, shut down overnight. Between March and May, leisure and hospitality employment dropped 37%. Scheduled air capacity to Florida fell by 80%. Hotel revenue was down by hundreds of millions of dollars per week. Theme parks shut their doors.

This past year necessitated flexible thinking and strategic agility. With those skills we head into another year with many unknowns. How will consumer travel preferences change? Which airline routes won't return? How will our local communities look once the pandemic dust has settled? While those and other questions await answers, let's take a look at where things stand now, in late spring 2021.

### TWO STORIES OF AIR TRAVEL

Air travel's recovery will be uneven. For example, domestic air capacity to Florida is scheduled to be 15% higher from May to August 2021 compared to the same time in 2019, reflecting the high level of demand among American travelers. However, for the same period, international capacity is scheduled to be down by 38%. Cumulatively, air capacity is scheduled to rise almost 3%.

### CAR RENTAL COSTS

Car rental companies responded to a COVID-induced drop in demand by selling off up to 40% of their fleets. Now they are struggling to replenish their fleets due to constraints in the auto market. As a result, car rental prices are likely to remain exceptionally high this summer; they reached \$500/day during spring break. This short supply, combined with an increase in gas prices, could put a dent in the pent-up demand for travel or influence the types of trips that people take. Perhaps they will stick to walkable destinations where a car is unnecessary or stay close enough to home that they can drive their own vehicle.

### ACCOMMODATIONS SEE THE LIGHT

Hotel rooms sold in March 2021 were down 22.9% from 2019 levels. Then came the week of April 4. Weekly rooms sold surpassed pre-COVID performance for the first time in over a year, with an increase of 3.5% resulting in \$44 million more revenue than the same week in 2019.

Vacation rentals fared better than hotels. Guest nights, down 3% from January to March compared to 2019, are pacing 54% above 2019 from May to August despite the fact that average rates in July are nearly \$450, just shy of \$100 more than 2019.

These trend lines should come as a relief to a battered industry.

### UNEVEN IMPACTS

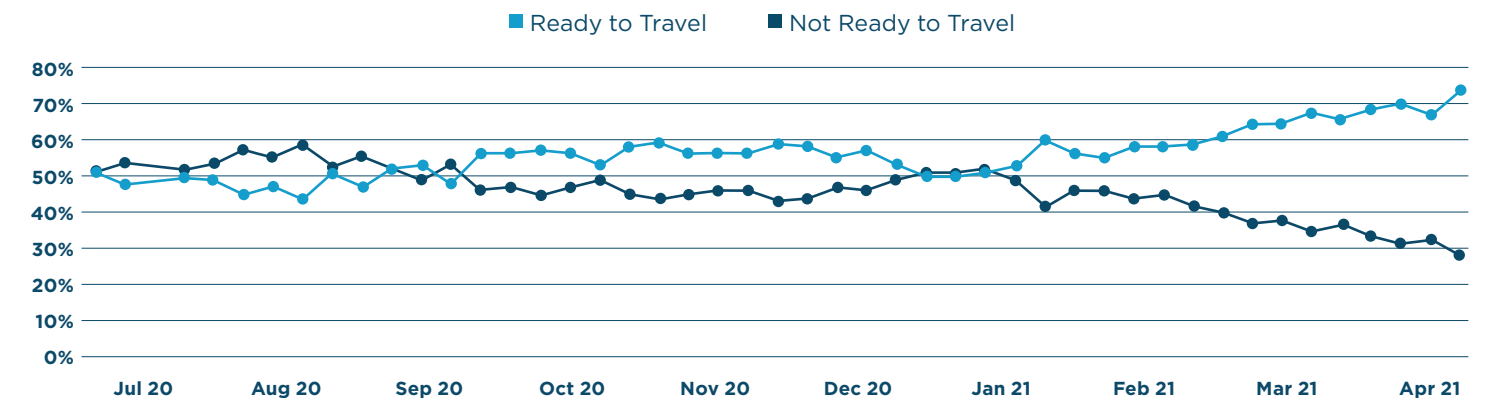
While 2020 visitation declined in every part of the state, some regions fared better than others. Hotel room revenues in the Orlando-Kissimmee area plummeted by 61% or \$2.8 billion. In Miami, the red numbers were a 49% decline in revenue, or \$1.6 billion. The falloff was less severe (27%) in the Panhandle where the 200 miles of beaches tend to be less crowded and are reachable by car from more states.

### DOMESTIC TRAVELERS READY TO ROLL

2021 brought newfound levels of optimism among American travelers. The intersection of successful vaccines and wanderlust plus international restrictions points toward a busy domestic travel season ahead. As schools let out and people hit the road, we will be watching to see which pre-pandemic travel behaviors persist, how cautious travelers adjust for safety, and what pandemic preferences last. One thing is certain: Our marketing plans will adjust accordingly.

### READINESS TO TRAVEL

This chart shows the percentage of American travelers who feel ready to travel compared to those who need more time before traveling.



Source: Destination Analysts



# 2020-21 YEAR IN REVIEW: FROM REBOUND TO RECOVERY

During the worst year for tourism in memory, VISIT FLORIDA never stopped preparing potential travelers for the days when they could hit the road again.

When people were staying safe and staying home, we reminded them that vacations were worth taking and that a Florida vacation is transformative.

We sustained our always-on efforts – pitching media, educating travel agents, executing promotions – but we also pivoted when necessary and recalibrated our strategy and tactics to best serve the Florida vacation brand and the state tourism industry.

We doubled down on a strong search strategy (SEO/SEM) to maintain consumer awareness and keep the Florida vacation brand top of mind.

We produced storytelling and marketing campaigns that were informed by consumer behavior data and the public health realities: Tourists were driving more, traveling in quarantine bubbles, and working and playing remotely.

We gave them the Florida outdoors and told them of the multitude of opportunities available here to be joyful and feel at ease.

Here are some of the highlights from a year unlike any other.

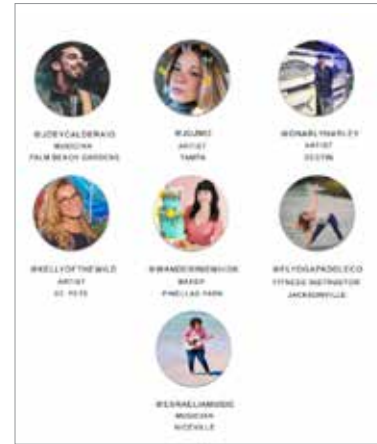
## MARCH/APRIL

Paused paid marketing campaigns and pivoted to information distribution regarding public health and travel safety.

- Sourced COVID-19 data from the CDC, state agencies, and local health departments.
- Updated safety pages daily as information changed.

Focused on industry support; provided research, visitor studies, webinars, and small-business toolkits for free to anyone who wanted them.

- Created COVID-19 Florida Tourism Impacts Dashboard; updated weekly.
- Extended partner renewal deadlines.



**APRIL-JUNE**  
Spotlighted local businesses, from musicians to bakers, through a series of live videos highlighting their talents or crafts.

- The “Florida Makers” series garnered over 1.6M impressions across social platforms.

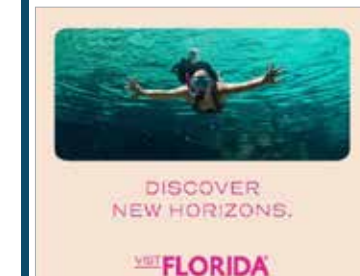
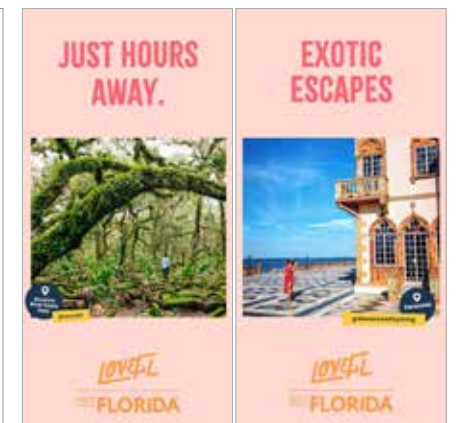


**JUNE**  
A UV-sensitive map, with Florida outdoor treasures revealed by sunlight, was placed in Outside Magazine.

- This innovative advertisement was recognized by AdWeek and named “ad of the day.”

**AUGUST**  
Launched a first-ever, in-state rebound campaign across broadcast TV, digital display and video, social, and PR.

- Those who saw our digital ads were almost 2 times as likely to take a trip in Florida.



**SEPTEMBER**  
Led the way with a domestic rebound campaign reaching potential travelers in a 700-mile drive radius from Florida.

- This multi-channel campaign drove a 1.7x Arrival Lift™ (those exposed to the advertising were almost twice as likely to travel to Florida as those unexposed).

MAR 2020

APR 2020

MAY 2020

JUN 2020

JUL 2020

AUG 2020

SEPT 2020

OCT 2020

## MARCH 2020-MARCH 2021



Created 166 new pieces of content focused on outdoor travel, virtual activities/events, socially-distanced vacation ideas, day trips, driving itineraries, and vacation rentals.

- New and refreshed content contributed to over 20M website visits, a year-over-year increase of approximately 20% in an otherwise decimated travel industry.

Prioritized media relations; hosted socially-distanced press trips and virtual events nationally and in six key international markets.

- Developed 110 press releases, 21 press trips, 10 virtual events.
- Over 3.3B media impressions earned (YTD), valued at more than \$23M.



Kept Florida top of mind through media promotions. Shifted messaging, allowing prize-winners to choose to vacation when they were ready.

- Executed 153 separate promotions across 17 markets that generated 619 hours of Florida-focused airtime.
- In total, these promotions delivered \$83M in earned media value and nearly 950M impressions.



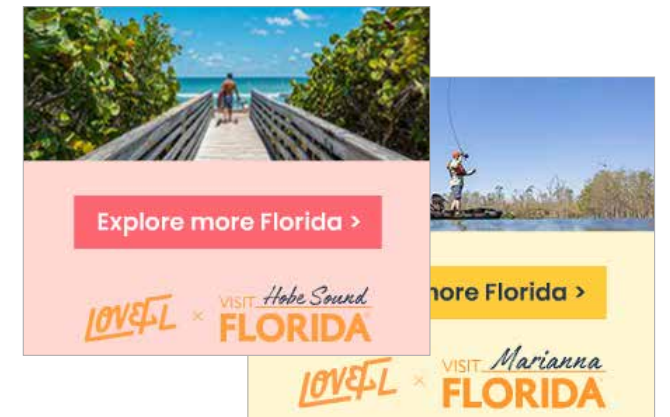
**MARCH 2020-MARCH 2021**  
While most destinations abandoned international markets, VISIT FLORIDA sustained in-country presence to maintain its strategic advantage.

- Conducted more than 100 virtual training webinars, reaching nearly 6,700 travel trade professionals in nine countries.
- Hosted five virtual events reaching nearly 1,000 travel trade.
- “Florida Fest,” created in partnership with UK-based TTG, promoted 15 Florida destinations (Kissimmee, Tampa Bay, and the Palm Beaches among them) to 450 travel agents, operators, and suppliers. Participant satisfaction ratings were near 100%.



**SEPTEMBER - OCTOBER**  
In-state and domestic co-op launched with participation from 25 destination partners.

- Co-op program attracted partner investments totaling ~\$847,000 and drove a 1.74x Arrival Lift™ to partner destinations.





**OCTOBER**

Created industry-leading content partnerships to keep Florida top of mind and provide virtual experiences for those not yet ready to travel.

- **CAMP**
  - This multi-touchpoint initiative drove over 1.4M article views and almost 100,000 minutes of engagement.
  - 89% of the families who attended a virtual event have already visited Florida in 2021 or intend to visit this year, delivering a potential 10X ROI.

- **New York Times**
  - “Postcards from Florida” was a two-part series of intimate first-person essays by notable Floridians: a Pulitzer-prize winner, an up-and-coming writer, and two beloved chefs. The essays celebrated what makes Florida special and inspired readers to consider a future trip on which they can make memories of their own.

readers to consider a future trip on which they can make memories of their own.

- The 45% CTR was 41% higher than the travel industry benchmark.

- **Washington Post**
  - Developed an immersive audio experience that allowed users to explore different aspects of Florida through sound.

- **Users engaged:** They spent an average of 2 minute 20 seconds exploring Florida sounds, exceeding the 2-minute benchmark.

- **Developed a first-of-its-kind partnership** between VISIT FLORIDA and The Outbound Collective to promote content from outdoor experts from traditionally underrepresented segments (LGBTQ+ community members, people of color, people with disabilities, and people of size).



**DECEMBER**

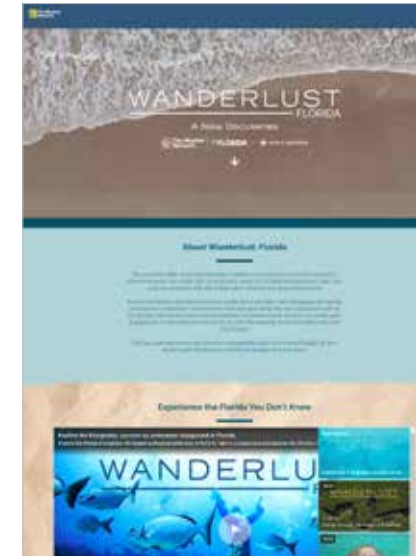
Developed partnerships with Allegiant Airlines, American Airlines/American Airlines Vacations, and United Airlines to feature Florida as a desirable vacation destination and drive bookings.

- Programs reached travelers in 11 markets in the Northeast and Midwest, plus Dallas.
- Campaigns drove increases in:
  - flight searches to Florida destinations (+17% YOY);
  - flight bookings to Florida for the Allegiant effort (+8.6% YOY); and American Airlines bookings (+80% MOM), representing American's best-performing month for Florida since the beginning of the pandemic.

**JANUARY**

Secured 286M earned media impressions around the Super Bowl.

- Coverage included The Today Show, Good Morning America, America This Morning, Cheddar TV, and The Weather Channel.



**FEBRUARY**

Created, produced, and distributed “Wanderlust,” a Florida docuseries in partnership with The Weather Network and Air Canada. The series aired on The Weather Network during winter as Canadians were stuck inside.

- Delivered 51.7 million impressions.



**FEBRUARY**

Hosted Virtual Florida Huddle, VISIT FLORIDA's first large-scale, virtual, global trade show.

- More than 800 buyers, suppliers, travel agents, and media from 18 countries attended.
- Nearly 7,000 appointments were conducted over three days.
- Partnered with Florida Museums Association to create a Virtual Gallery Hop video series to highlight Florida arts and culture.

OCT 2020      NOV 2020      DEC 2020      JAN 2021      FEB 2021      MAR 2021      APR 2021      MAY 2021      JUN 2021

**DECEMBER**

VISIT FLORIDA commissioned Event MB, a major publication covering the events industry, to report on Florida destinations that were adapting to public health realities with virtual and hybrid events.

- Three articles, with rich examples provided by 10 destinations, including Miami, Panama City Beach, and the Florida Keys, showed how events can be adapted for COVID safety and the next normal.



**DECEMBER**

VISIT FLORIDA was recognized by AdWeek as one of 10 standout brands of 2020.

- Highlighted for our advertising efforts promoting Florida as an inclusive and accessible travel destination, VISIT FLORIDA was featured among major global brands such as Microsoft, Google, Amazon, Airbnb, Comcast/NBCU, and Expedia.

**DECEMBER**

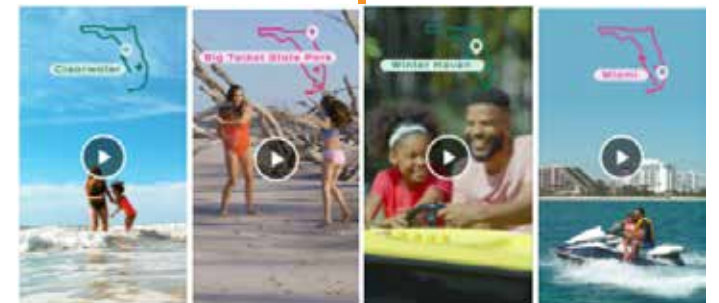
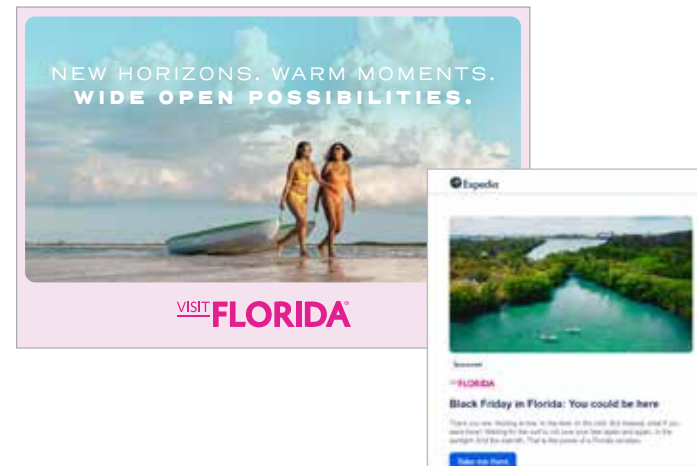
A satellite media tour, supporting the domestic campaign, and promoted a “What if You Were Here” sweepstakes.

- Total exposures: 27,627,334



**DECEMBER - MARCH**

Ran a nationwide campaign promoting travel to Florida during the winter season. Expanded the typical Northeast U.S. targeting to include California, Oregon, and Washington in an effort to capture potential travelers desperate for sunshine and freedom.

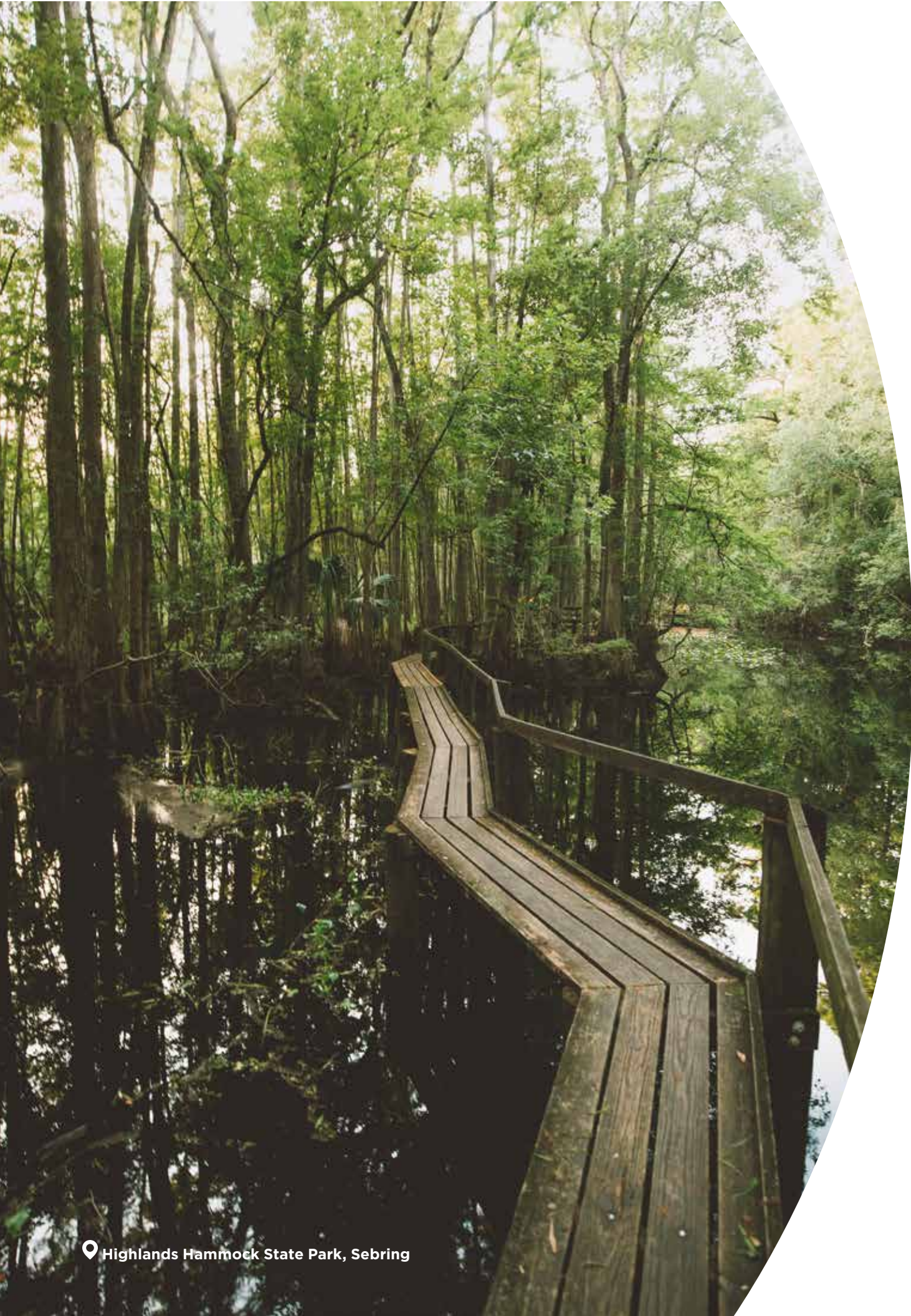


**MARCH - JUNE**

Expanded our COVID rebound efforts with a Families-focused campaign to increase the desirability of a Florida vacation and capture those who are ready to travel now.

- This integrated campaign was anchored by a national TV advertising buy. For the first time in over a year, Florida's hotel occupancy levels were close to normal and road trips to Florida surpassed 2019 levels.





Highlands Hammock State Park, Sebring

# Performance Snapshot

## COVID-19 ENDS A DECADE OF RECORD VISITATION

The coronavirus pandemic gut-punched the tourism industry in 2020, wiping out the state's most significant economy and reducing visitor volume to its lowest level since 2004.

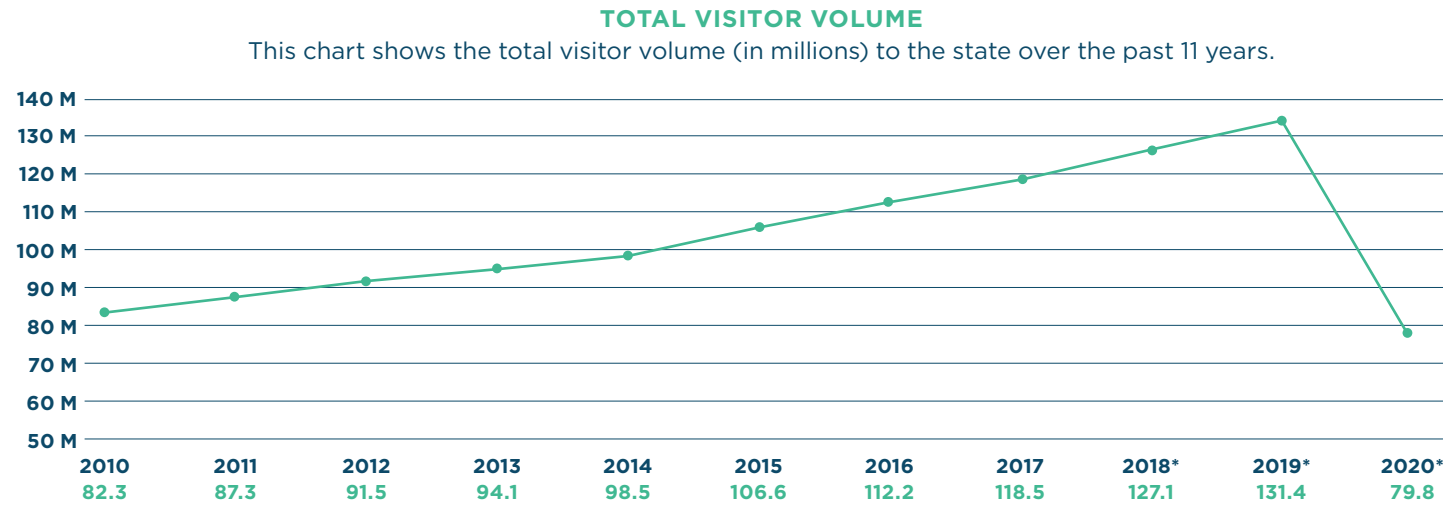
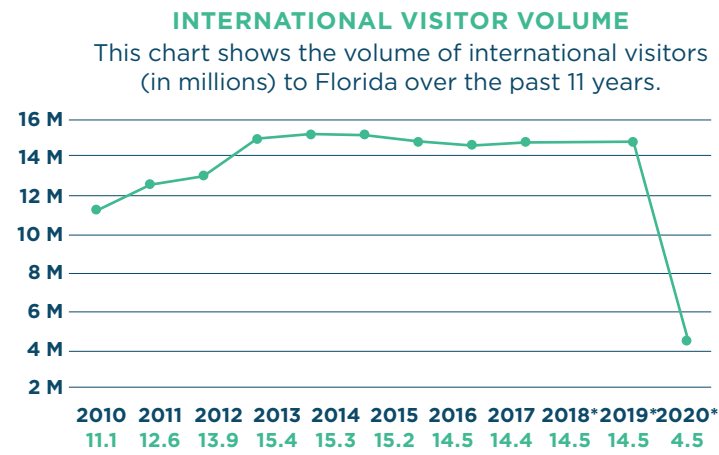
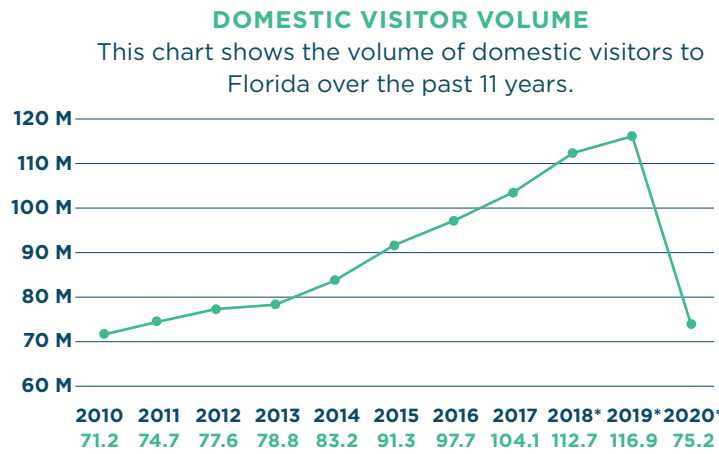
Tourism Economics and the U.S. Travel Association estimate that between January 2020 and March 2021, travelers spent \$51 billion less in Florida compared to a year prior.

Visitation declined by 39% year over year, falling to 79.8 million after a record 131.4 million in 2019. The numeric difference – 51.6 million fewer vacationers – is greater than the population of Canada.

International visitation to Florida was particularly hard-hit as border closures and travel restrictions led to an unprecedented 69% decline from the previous year. The share of Florida visitors originating from outside the United States fell to 6%, down from a high of nearly 11% in 2019.

Until those restrictions are lifted, Florida's recovery in the near term will be driven by the enthusiasm of American travelers.

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For all charts, source: VISIT FLORIDA. \*Estimate is preliminary and subject to change



# MARKET SHARE

## THE IMPACT OF TRAVELERS VACATIONING CLOSE TO HOME

Prior to COVID-19, Florida's market share of domestic travelers had been climbing steadily for several years and reached its highest-ever level in 2019 at 18.2 percent. Our share of overseas travelers also had increased (to 23.8%), ending a long retraction.

In the last three quarters of 2020, even as pandemic restrictions and safety concerns depressed tourism, many visitors found safety and comfort in the spacious outdoors - beaches in particular.

The percentage of overnight travelers who visited America's shorelines in 2020 reached its highest level ever. And, while this trend helped Florida retain its solid first-place position in the domestic travel market, its market share lost a few tenths of a percentage point.

So what happened? Potential travelers from origin markets such as New York and California, which traditionally deliver large numbers of vacationers

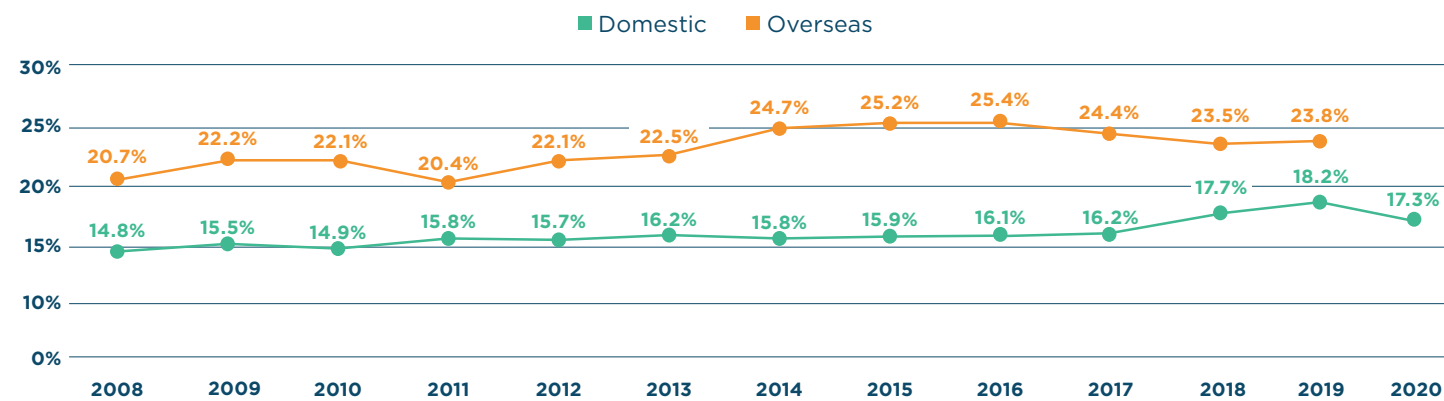
nationwide, were stuck at home in 2020. Alabama, Colorado, Mississippi, and Maryland generated the biggest relative growth in travelers, but they were taking vacations in their home states.

Despite international shutdowns, Florida's 2020 share of overseas travel should improve once market share figures become available. Visitation to the U.S. from the Caribbean and Latin America started to recover in late Summer 2020, and Florida typically receives over 50% of those visitors. Meanwhile European and Asian visitors, who most frequently travel to chief competitors New York and California, remained near zero through the year.

The year ahead will bring more competition than Florida has ever experienced. The courting of domestic travelers will intensify, and once international destinations open the competition will be relentless. Maintaining our leading market share position will be a crusade worth fighting for.

### FLORIDA'S MARKET SHARE

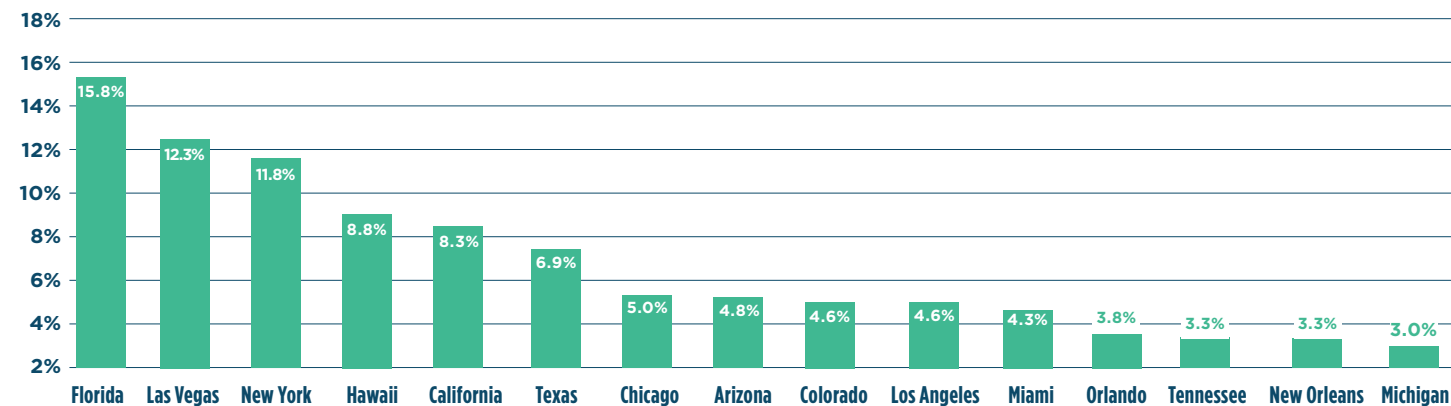
This chart tracks Florida's share of the domestic vacation market and overseas visitation.



Source: D.K. Shifflet, U.S. National Travel & Tourism Office

### MOST DESIRED DESTINATIONS

This chart shows the percentage of people who listed each destination as one of the top 3 places (city or state) they most want to visit in the next year.



Source: Destination Analysts, April 9-11, 2021

# HOTEL OCCUPANCY AND REVENUE

Florida's hotel industry faced remarkable challenges in 2020: a freefall in visitation, the unexpected costs of implementing COVID safety protocols, plus strong competition from vacation rentals and short-term accommodations. Despite these difficulties, some destinations showed remarkable resilience.

The year began auspiciously. Hotel room bookings grew by 5.6% in January and 4.5% in February, but then Florida's first case of COVID was confirmed on March 1. The collapse in demand that followed grew progressively more severe with each case count report.

As nationwide lockdowns took hold, hotel demand in April fell 79.1% from the same month in 2019. Many hotels temporarily closed rooms or entire properties. In the absence of both leisure and business travel, occupancy dropped to 21.5% despite the decrease in supply.

COVID's impact on the 2020 bottom line for Florida's hotels has no modern precedent:

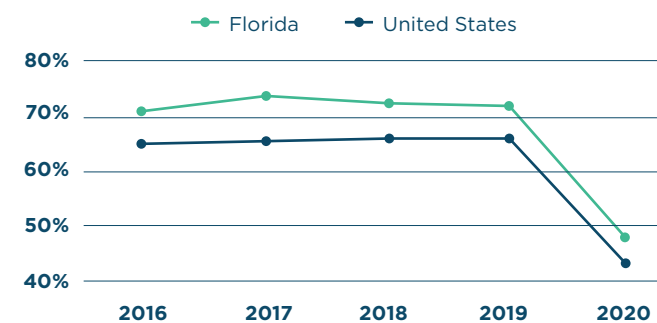
- > 44.4 million fewer rooms sold than in the previous year;
- > \$7.4 billion less revenue;
- > Layoffs contributing to a statewide unemployment rate of more than 13% in April and May.

Recovery began gradually with the return of drive visitors, first during Memorial Day weekend and continuing through the summer months. Rooms sold increased modestly from May through November, though destinations did not recover at the same pace. The north Florida markets - the Panhandle, Jacksonville, and Daytona Beach - came closest to reaching 2019's levels of room demand during the summer months. The Panhandle, for example, was down 13% in June 2020. The Florida Keys and Southwest Florida also showed signs of recovery. But the major population centers of central and south Florida fared much worse. They were down by 72% and 54%, respectively, in June.

Despite the challenges that Florida hotels faced in 2020, there are reasons for optimism. More than 100 hotel projects are scheduled to open in 2021, bringing more than 13,000 new rooms to market. Expanded access to COVID vaccines, an improved economic outlook for the national and global economy, and pent-up demand for travel will likely drive recovery for Florida hotels through the first half of 2022.

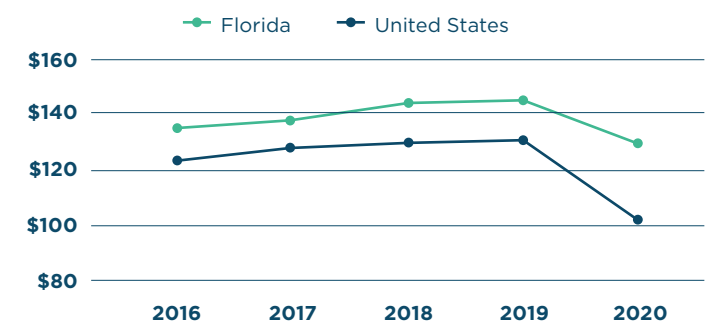
### OCCUPANCY RATES

This chart shows the five-year trend of Florida occupancy rates compared to U.S. rates.



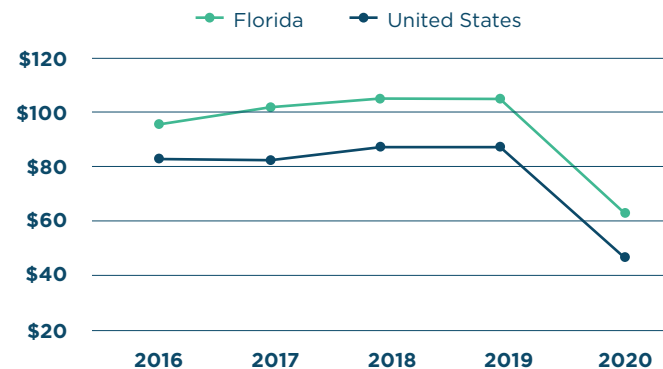
### AVERAGE DAILY ROOM RATE

This chart shows the five-year trend of Florida average daily room rates compared to U.S. rates.



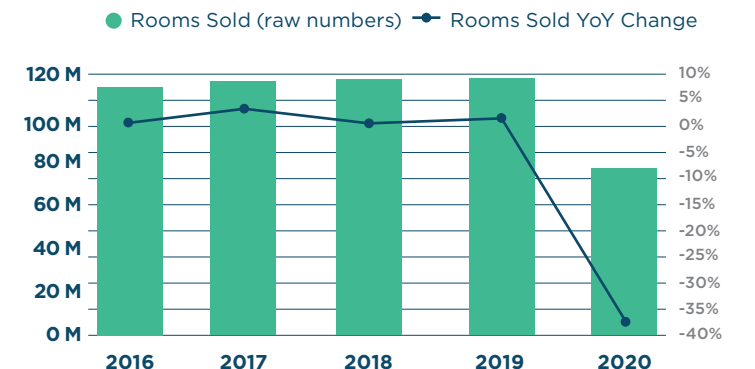
### REVENUE PER AVAILABLE ROOM

This chart shows the five-year trend of Florida revenue per available room compared to U.S. rates.



### ROOMS SOLD

This chart shows the five-year trend of Florida hotel room demand and year-over-year change in demand.



For all charts, source: STR



## TOURISM'S ECONOMIC IMPACT

In 2019, tourism's impact on the state economy had reached new heights: a record \$96.5 billion contributed to Florida's economy. Out-of-state visitor spending came remarkably close to the 5-year-strategic goal of \$100 billion, reaching \$98.8 billion.

Tourism was responsible for \$57.2 billion in wages and salaries paid to more than 1.6 million full- and part-time Florida workers – both record numbers. Tourism also contributed \$27.6 billion in taxes, including \$12.7 billion in state and local taxes. That's the good news. Now the bad news. It is likely that the pandemic's toll on 2020 visitation will be mirrored in a year-over-year decline in spending, wages, taxes, and overall economic impact.

According to estimates from Tourism Economics, weekly travel spending fell from \$1.9 billion during the last week

of February to as little as \$150 million in late April, a decline of more than 90% from 2019. What felt like the beginning of a recovery in May and June stalled in July at \$1.1 billion per week and remained there through much of the Fall. By December, cumulative losses since the onset of COVID topped \$44.6 billion in Florida, while weekly travel spending remained lower than the previous year by more than 40%.

Fortunately, the U.S. Travel Association projects that real GDP, which sunk by 3.5% in 2020, will rebound by nearly 7.2% in 2021. U.S. domestic travel spending in 2021 likely will see strong year-over-year growth, but spending is forecast to remain 40% lower than in 2019. Recovery to 2019 levels is unlikely to occur until 2024, according to the Florida Legislature's chief economist.

### TOURISM'S IMPACT ON 2019 GDP

Indirect impacts are the measurable effects on non-tourism businesses that provide supplies to tourism businesses (e.g. restaurant suppliers). Induced impacts are the effects on non-tourism businesses due to spending of wages by employees of tourism businesses.

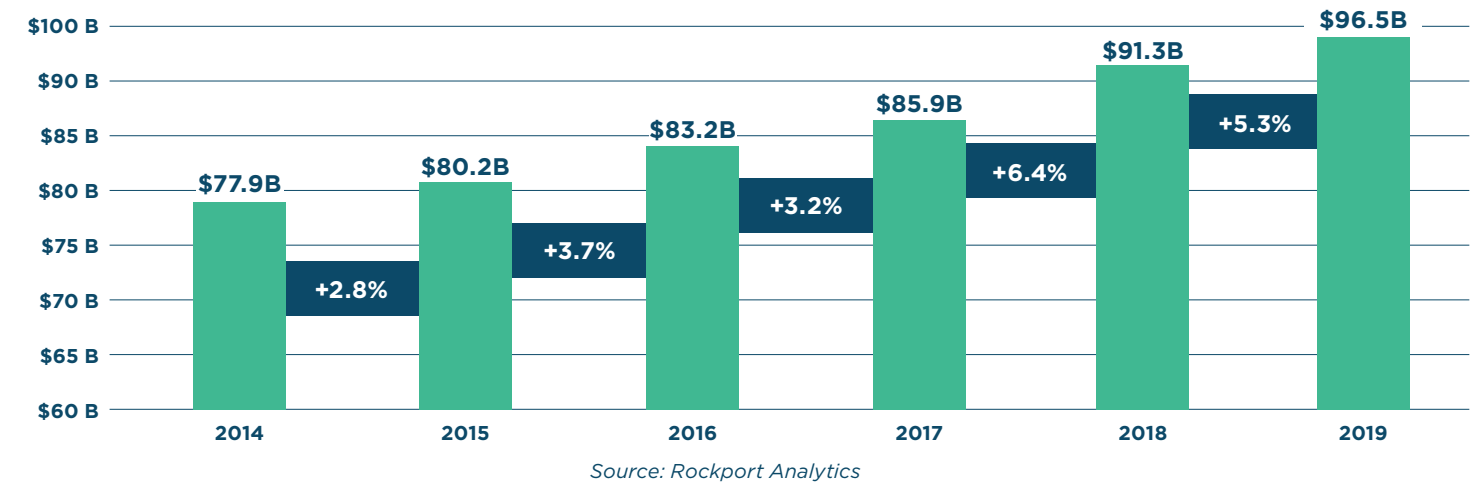


TOTAL  
**\$96.5B**

Source: Rockport Analytics

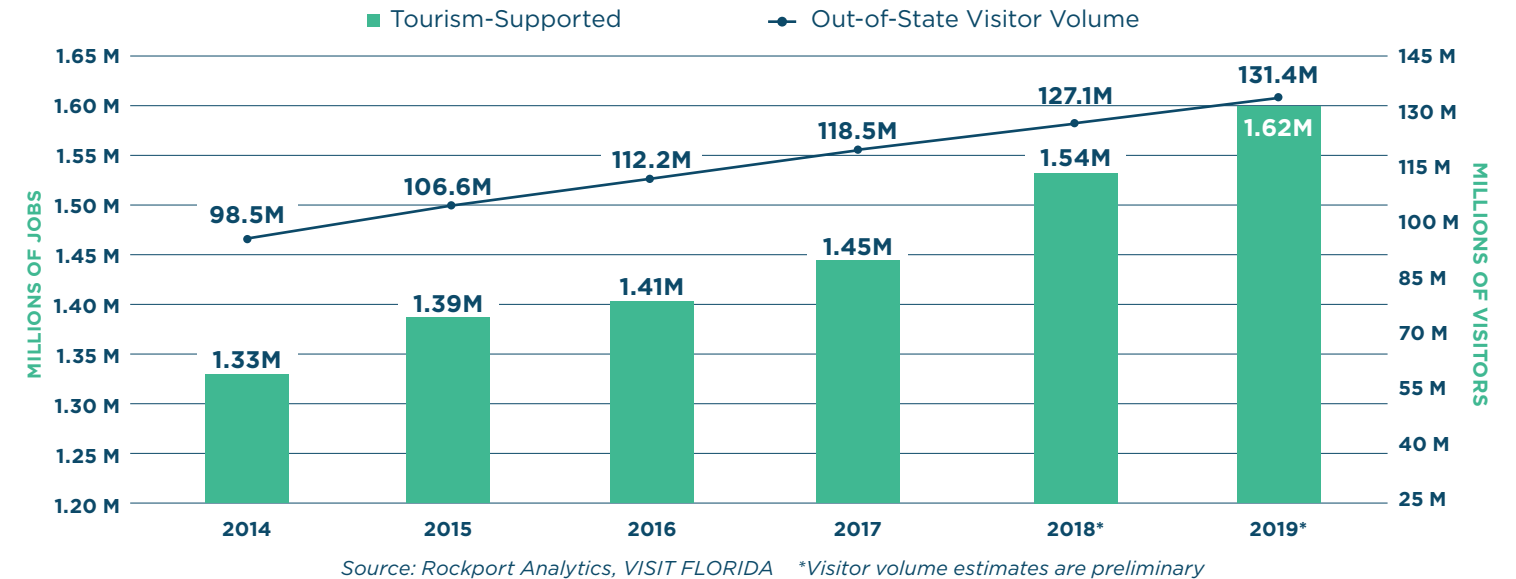
### TOURISM'S CONTRIBUTION TO FLORIDA'S GDP (in billions)

This chart shows the amount that out-of-state visitors contributed to Florida's economy each year.



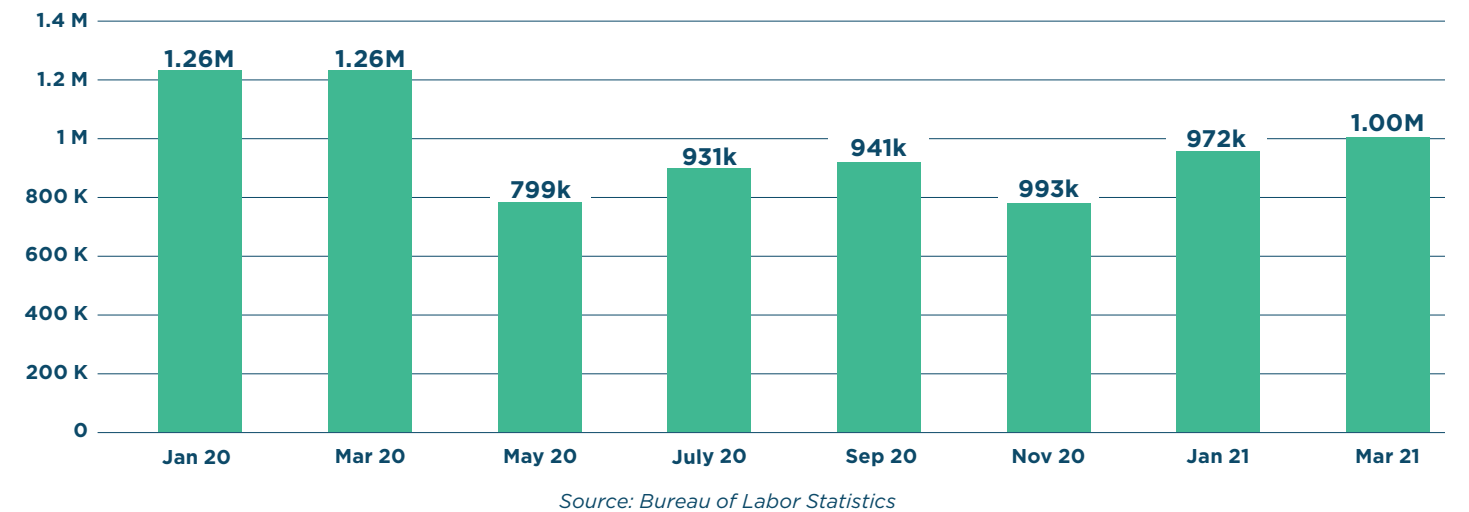
### JOBS SUPPORTED BY OUT-OF-STATE VISITORS (in millions)

This chart shows the number of Floridians employed by the tourism industry compared to total out-of-state visitor volume. As visitors increased, so have Florida jobs.



### FLORIDA HOSPITALITY AND LEISURE EMPLOYMENT

This chart shows the number of Floridians employed in the Leisure and Hospitality sector from January 2020 through March 2021.







Bok Tower, Lake Wales

# Florida Visitors



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## DOMESTIC MARKET

### VISITOR VOLUME: VIRTUALLY ALL-AMERICAN AND MOSTLY DRIVERS

With international travel shut down for most of 2020, domestic visitors were more important to Florida’s tourism economy than at any time in recent history. Over 94% of Florida’s 86.7 million out-of-state visitors came from U.S. origin markets.

COVID also affected how those visitors traveled to Florida. More often than not, they drove.

Fear of contracting COVID in airports and airplane cabins meant significantly fewer tourists by air in 2020 – 28% of Florida’s domestic visitor volume, a 7-point decline year over year. Between March and December of 2020, the number of domestic flights available to Florida fell by 38% from the same period in 2019.

Fortunately for our tourism industry, people are willing to drive a long way for a Florida vacation.

New York remained the top origin state in 2020 with a 10% share. Illinois nearly doubled its share of visitors to 8%. Alabama, Georgia, and Texas rounded out the top five. Louisiana saw its share of domestic visitors rise to 4% from 2% in 2019. Some distant states that have ranked highly among Florida’s origin markets in past years – Pennsylvania, Michigan, and New Jersey – saw their shares decline.

### TOP SIX DMAS

Florida’s top six origin markets increased in importance in 2020. Together, they accounted for nearly one-third of domestic out-of-state visitors. Among these markets, a few interesting shifts were notable. New York City continued to be the top designated market area (DMA), but its share of visitors fell. By contrast, Chicago’s share rose to 6%. And Birmingham, Ala., the 20th-ranked origin DMA in 2019, joined the top 6.

### TOP 13 ORIGIN MARKETS

ORIGIN MARKETS		SHARE OF FLORIDA’S DOMESTIC VISITORS		PP* CHANGE (2019-2020)	SHARE SHIFT
		2019	2020		
1.	New York, NY	11.1%	9.6%	-1.5%	▼
2.	Chicago, IL	3.7%	6.0%	2.3%	▲
3.	Atlanta, GA	6.2%	5.8%	-0.4%	▼
4.	Birmingham, AL**	1.3%	5.3%	4.0%	▲
5.	Philadelphia, PA	3.5%	2.8%	-0.7%	▼
6.	Washington, DC	2.8%	2.8%	0.0%	■
7.	Boston, MA	3.3%	2.7%	-0.6%	▼
8.	Minneapolis-St. Paul, MN	1.1%	2.4%	1.3%	▲
9.	St. Louis, MO	1.1%	2.3%	1.1%	▲
10.	Los Angeles, CA	1.3%	1.9%	0.6%	▲
11.	Detroit, MI	2.0%	1.7%	-0.3%	▼
12.	Houston, TX	1.7%	1.6%	0.0%	■
13.	Dallas-Fort Worth, TX	1.7%	1.4%	-0.3%	▼

Source: D.K. Shifflet; sample size too small to include top 15 markets; \*percentage point, numbers in this column may be different than expected due to rounding; \*\* small sample size



## DOMESTIC MARKETS TO WATCH

With many international visitors still grounded by the pandemic, domestic markets should continue to have outsized importance to Florida's tourism industry in the near term. Road trips will maintain their appeal, but the airline industry is beginning to recover. As Florida relies on domestic markets, each of the regions below will play an important role in our industry's success.

### NEW YORK

New York was a source of both good and bad news for Florida in 2020. Its share of Florida visitors fell by 1.5 percentage points, the biggest decline of any major origin market – not surprising, given the long lockdowns in NYC. Still, it managed to hold onto its first-place position. There were also many reports of New Yorkers and their companies moving to Florida, which could bode well for future business travel and visiting friends and relatives who now call themselves Floridians.

### CHICAGO

The Windy City blew away expectations in 2020. Given its Midwest location – 900-plus miles from Pensacola, the closest Florida destination – Chicago wasn't on our radar in the early recovery as a potential growth market. But historically more than half of Chicagoans who visit Florida get here by car. The tradition held in 2020 despite COVID and Chicago's share of Florida visitors grew by 2.3 percentage points, helping it supplant Atlanta as the No. 2 origin market.

### ATLANTA

Atlanta should have been a slam dunk for Florida in 2020. It's the closest major metro to most of the state, and

drivers can get to a variety of beach destinations within a few hours. Instead, Atlanta lost 0.4 percentage points of share and its long-held position as the No. 2 origin market. Florida will need to make sure this trend doesn't continue.

### BIRMINGHAM

Birmingham put up a stellar performance in 2020, as predicted. Its close proximity to Florida's Panhandle helped the Alabama city pick up 4 percentage points of share, the biggest gain among any origin market. It remains to be seen if this will turn into a habit.

### LOS ANGELES AND WEST COAST

Pacific-coast states experienced some of the strictest lockdown conditions in the country, but that didn't stop Los Angeles from pushing its way into the list of top origin markets. VISIT FLORIDA saw an opportunity in California, Oregon, and Washington, and began advertising there as part of our winter campaign. The early results are astounding. Road trips to Florida from these states were up by nearly 1,200% the week of April 12, 2021, compared to the same week in 2019.

### DALLAS AND HOUSTON

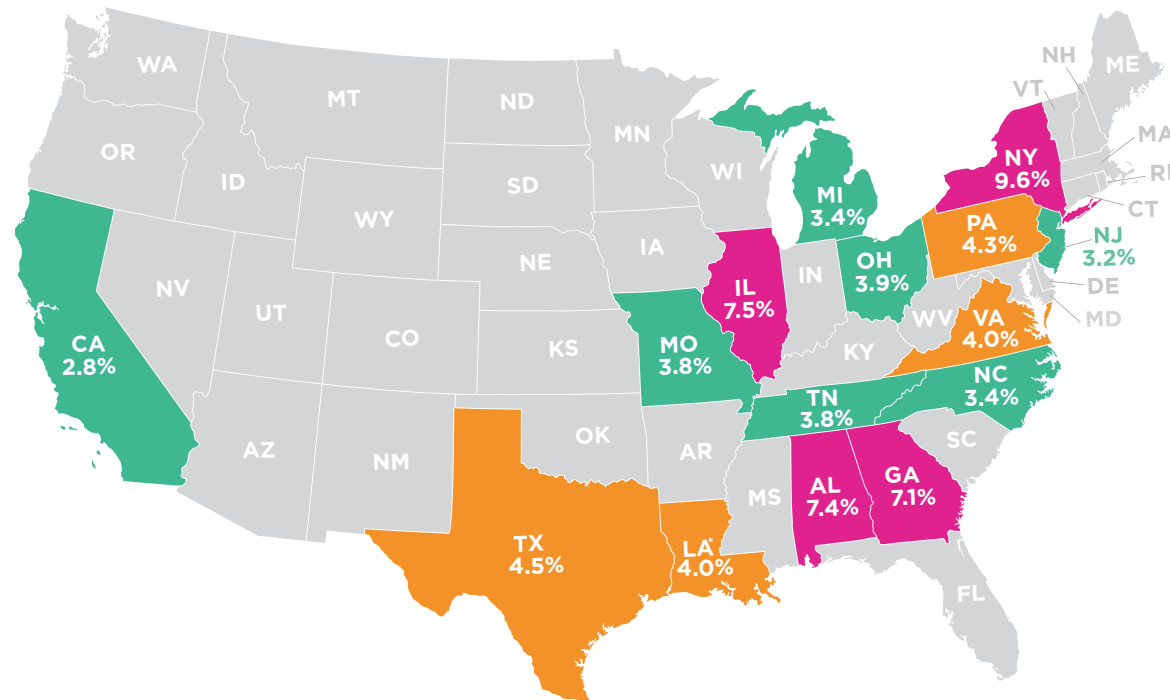
Comparable to its expectations for Atlanta, VISIT FLORIDA anticipated big things from these two Texas markets in 2020. The drive to the Panhandle is relatively easy, and Dallas and Houston had performed well in recent years. But both markets saw their share of Florida's visitors decrease fractionally – Dallas by 0.3%, Houston by 0.1%.

### FLORIDA'S TOP 15 ORIGIN STATES

This chart shows the percent of visitors originating in each state.

- More Than 7%
- 4-7%
- 2.8-3.9%

Source: D.K. Shifflet  
\*Small sample size



## IN-STATE MARKETING: UNCHARTED TERRITORY

As the pandemic dragged on, putting many restaurants, hotels, and museums on life support, VISIT FLORIDA stepped in to help with the following insights guiding its efforts. Research had shown that people felt safer traveling close to home. One survey found that nearly 63% of Florida residents said they felt a responsibility to support the state's economy. And nearly half said that when they started traveling again, they would go to a Florida destination first because it was important to support Florida businesses.

In August 2020, VISIT FLORIDA adjusted its traditional advertising emphasis on out-of-state markets and launched a \$3.5 million campaign calling on Floridians to vacation in their home state.

They heeded the call.

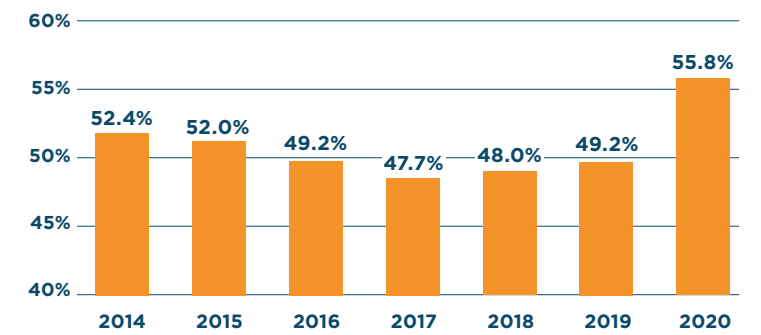
As seen in the chart at right, Florida's market share of its own residents' leisure travel reached its highest point in recent history. Floridians seemed to revel in the opportunity to enjoy the outdoors and traditional tourist destinations without the usual crowds. The percentage of in-state travelers visiting a theme park in 2020

increased by 7 percentage points over 2019, while biking, camping, and golfing each were up by 4 percentage points.

While this in-state influx didn't replace the tens of millions of out-of-state visitors who stayed home, it injected some much needed revenue into Florida's struggling tourism industry.

### FLORIDA IN-STATE TRAVEL

This chart shows the percentage of leisure trips by Floridians with a destination in Florida each year.



Source: D.K. Shifflet



Rainbow Springs State Park, Dunnellon



# DEMOGRAPHICS

## LIFESTAGE SEGMENTS

Florida's domestic visitors represent a diverse portfolio of generational cohorts, income levels, family composition, and ethnicities. VISIT FLORIDA tracks visitor volume, spending, and other patterns by lifestage segmentation. Lifestage categories combine three variables (age, household income, and the presence of children in the household) to create seven segments that are most likely to differentiate visitors.

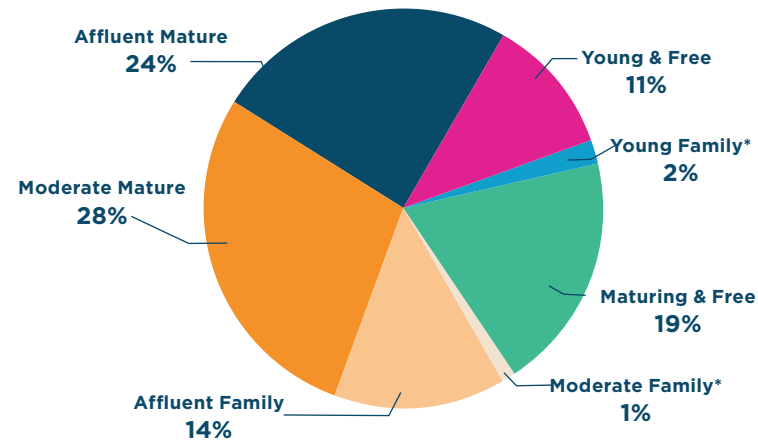
2020 shook up the hierarchy of Florida's visitors. Our share of family-based and younger segments shrank, while our lead grew among older, unencumbered lifestage

segments: Maturing & Free (35-54 years old; any income; no children), Moderate Mature (55 years or older; <\$100K; no children), and Affluent Mature (55 years or older; \$100K+; no children).

Florida was also a favored choice among affluent travelers, which bodes well for the state's recovery. Higher-income households were largely spared from the worst economic impacts of the pandemic. These lifestage segments are best positioned to travel to make up for lost time and spend a lot of money doing it.

### LIFESTAGE SEGMENT COMPOSITION

This chart shows the share of domestic visitors to Florida by lifestage.

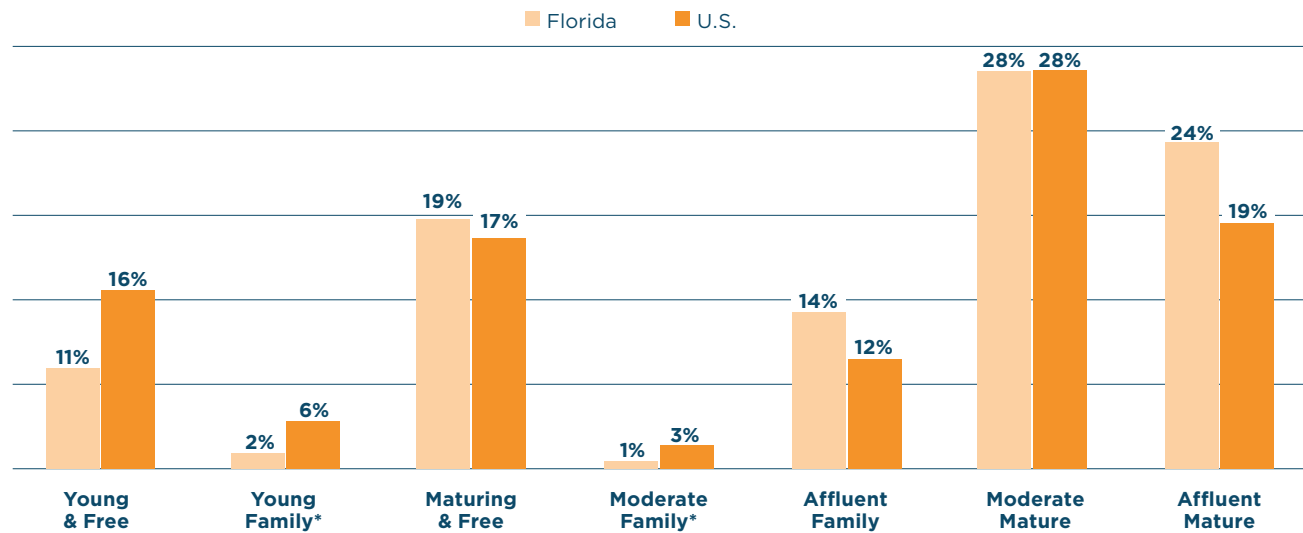


\* Small sample size. Source: D.K. Shifflet

- Young & Free** (18-34; any income; no kids)
- Young Family** (18-34; any income; kids in HH)
- Maturing & Free** (35-54; any income; no kids)
- Moderate Family** (35-54; <\$75K; kids in HH)
- Affluent Family** (35-54; \$75K+; kids in HH)
- Moderate Mature** (55 or older; <\$100K; no kids)
- Affluent Mature** (55 or older; \$100K+; no kids)

### COMPARISON OF U.S. AND FLORIDA TRAVELERS

This chart shows the share of U.S. travelers by lifestage compared to the share of Florida's visitors by lifestage.



\* Small Florida sample size. Source: D.K. Shifflet

# AGE AND FAMILY COMPOSITION

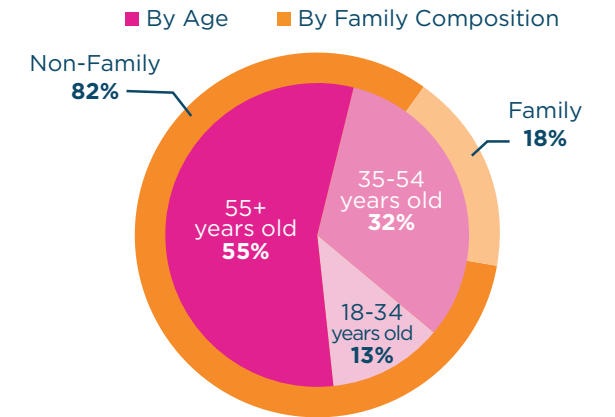
## COUNTING ON THE RETURN OF FAMILIES

Cautious about the health risks of travel, families across the nation stayed home in 2020. Non-family travel drove Florida visitation as family visits dropped nearly 60 percentage points compared to 2019. Florida also underperformed on family travel compared to the U.S. as a whole by two percentage points. But looking ahead, the family travel segment is poised for a rebound; throughout the initial stages of travel's recovery, spending time with family has been a key travel motivation for many Americans.

Florida sits in a good position for 2021 and 2022. It offers the kind of travel experiences that people are looking for. It's affordable, there's something for everyone, and it's easy to get to and navigate. Florida is a known commodity with a track record of sending people home happy - a sure thing for families feeling overstressed and fatigued from the past year. In anticipation of the return of families, VISIT FLORIDA started marketing to them months before most competitors. But competition will be fierce as destinations across the country also try to bounce back as quickly as possible.

### DOMESTIC VISITORS BY AGE AND FAMILY COMPOSITION

This chart shows that in 2020, Non-Family Lifestages (those with no children in the household) made up 82% of Florida's domestic visitors. This chart also shows that in 2020, the Mature Lifestages accounted for over half of Florida's domestic visitors.



Source: D.K. Shifflet

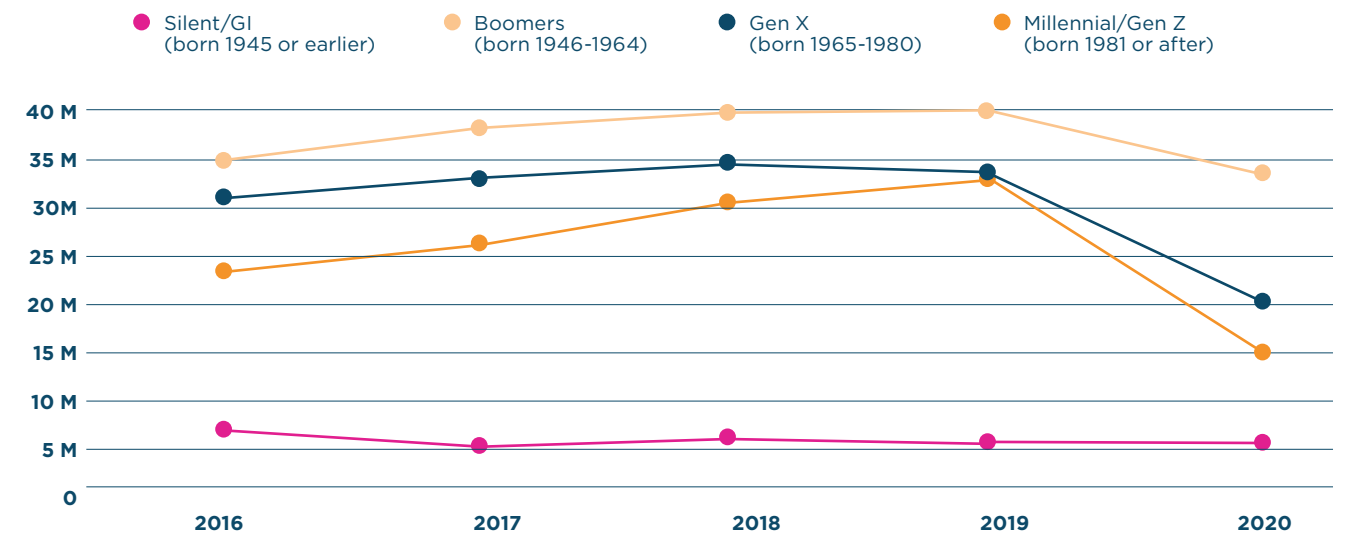
### COVID WAS HARDER ON LOWER INCOME LEVELS

Baby Boomer travel to Florida tends to peak during the winter. Gen X and Millennial/Gen Z travelers are more likely to come during spring and summer. In the months leading up to the declaration of a worldwide pandemic - during the most popular travel season for Boomers - travel was on pace to outperform 2019. The travel industry experienced a minor lift during the summer - a high season for younger travelers - but it was not enough to offset overall declines seen in the chart below.

The pandemic's unequal impacts on distinct population segments also contributed to differences in visitor volume. Millennial and Gen-Z cohorts as well as Black and Hispanic populations - which are both younger and/or have lower incomes than the nation as a whole - bore the brunt of the economic fallout. Unless the economic inequalities created by the pandemic are addressed quickly, it is reasonable to expect that travel by younger generations will be suppressed for some time.

### DOMESTIC VISITOR VOLUME BY GENERATION

This chart tracks Florida's visitors by generational cohort over the past five years.



Source: D.K. Shifflet, VISIT FLORIDA



# INTERNATIONAL MARKETS

## OVERSEAS IS ON HOLD, BUT LATIN AND SOUTH AMERICA ARE HELPING

In an attempt to slow the spread of the virus, the United States halted inbound international travel for all but essential trips – sometimes from specific countries, sometimes across the board.

In April 2020, with those borders closed, overseas arrivals in the United States totaled next to nothing: 15,000 visitors, down 99.6% from April 2019. Inbound international travel would inch forward slightly the rest of the year, but by December year-over-year overseas visitation to the United States was still off by 88%.

Travel from Europe, Asia, Brazil, and Africa remains close to zero, and the border between Canada and the United States remains closed as of publication. Canadian deplanements in Florida in February 2021 were 96% below the year prior, and a quick recovery is unlikely especially since vaccine distribution has been slow-going. But visitors from Latin American and Caribbean countries, where Florida typically enjoys a market share in excess of 50%, started to trickle in by late summer. We expect that visitation to continue to grow.

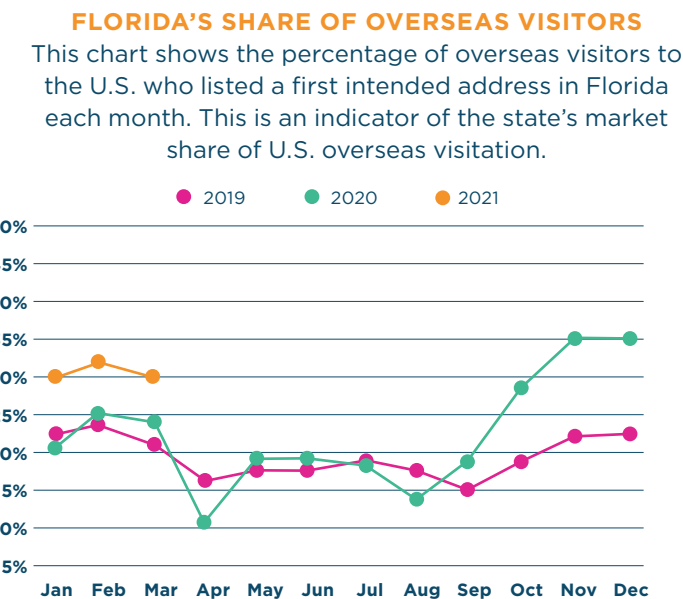
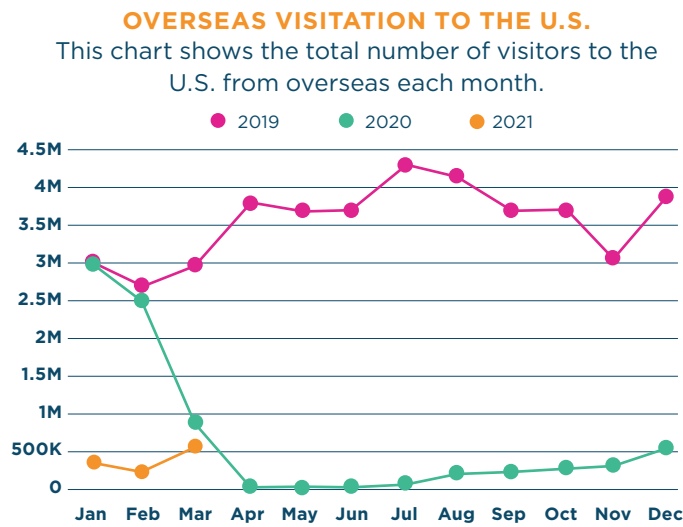
When international visitors pass through U.S. customs, they are asked where they plan to spend their first night in the country, also known as the “First Intended Address” (FIA). Florida’s FIA numbers were down by 76% in December, but better than the 84% for the nation as a whole. The share of U.S. visitors with a first intended address in Florida in December jumped from 23% in 2019 to 35% in 2020, due to the shift toward Lat-Am origin markets and Florida’s desirability as a destination.

For the time being, COVID has altered the hierarchy of origin markets in Latin and South America.

- > Brazil, the historic leader for visitor volume, continues to struggle against the virus while we have seen some promise from secondary markets such as Argentina and Colombia.
- > Mexico, where VISIT FLORIDA has begun to invest substantial time and funds, has done well.
- > Ecuador, Chile, and Peru – traditionally lower-profile secondary markets – emerged as top-tier origin markets.

VISIT FLORIDA will need to keep an eye on these markets and evaluate the best way to take advantage of their willingness to travel here.

In the meantime, getting to Florida is still a challenge. For nearly all overseas markets, planes are the only



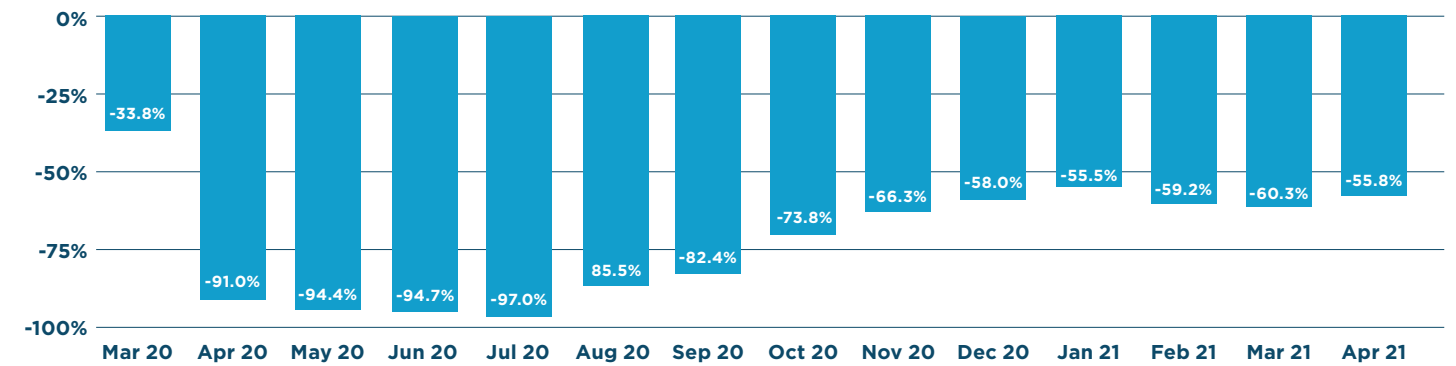
transportation option. As international travel vanished and domestic travelers took to their cars in order to feel safer, airlines scaled back capacity. At the beginning of the pandemic, international airlift to Florida was down by 95%. By March 2021, as the numbers of vaccinated rose, so did the ability and willingness to fly. But international air capacity was still off by 60%.

Multiple airlines have gone out of business or filed for bankruptcy, including Avianca and LATAM (historically two of the largest carriers from Latin America to Florida). Fortunately, airlines are for-profit companies; as the demand returns, it is reasonable to expect that the capacity will return as well.

For all charts, source: U.S. Department of Commerce; excludes Mexican visitation by land and Canadian visitation

## YEAR-OVER-YEAR CHANGE IN INTERNATIONAL AIR CAPACITY

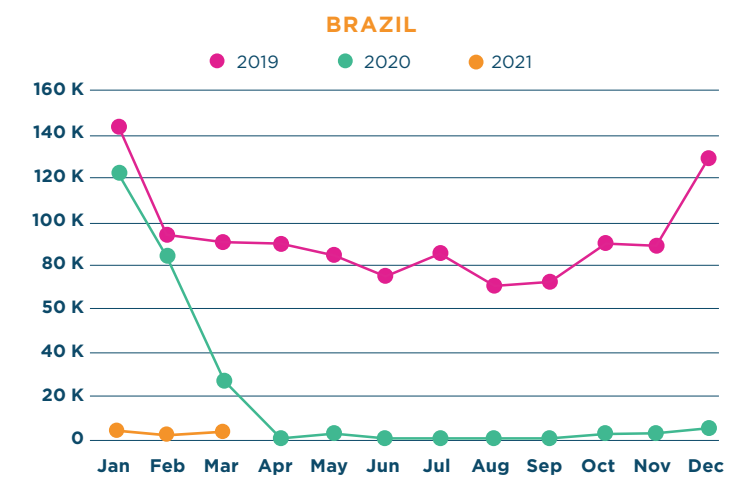
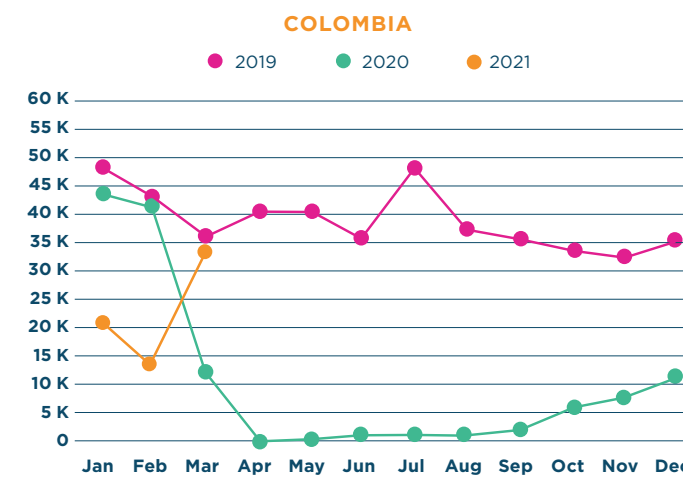
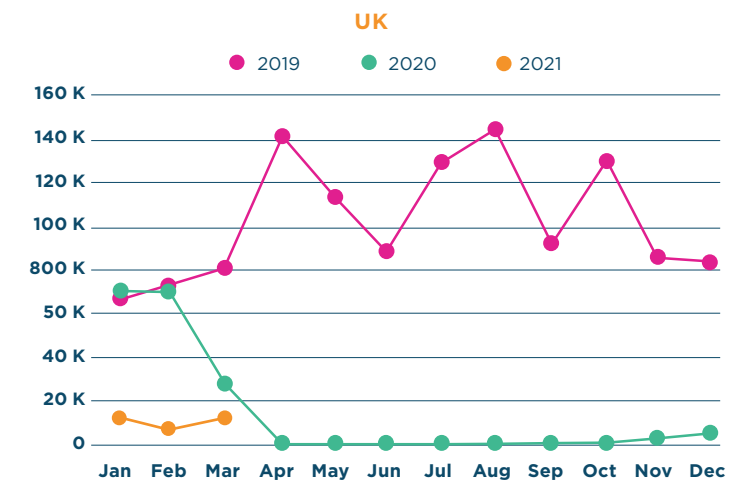
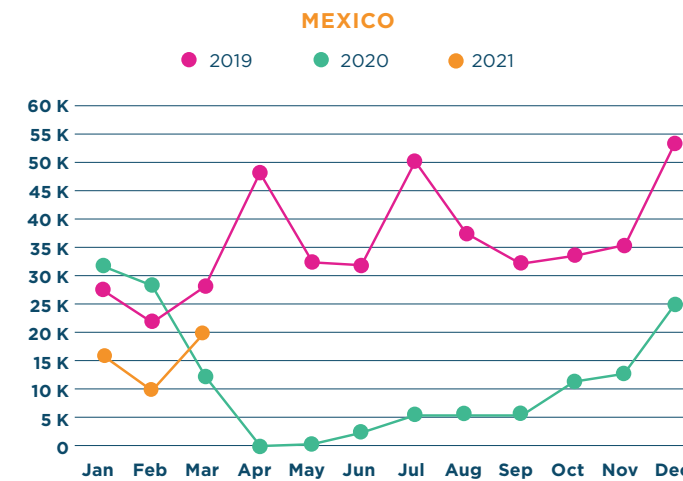
This chart shows the percentage change in the number of seats scheduled to fly into Florida from international airports each month compared to the same month prior to the pandemic.



Source: Airline Data, Inc.

## INTERNATIONAL MARKET SNAPSHOTS

These charts show the number of visitors to the U.S. who had a first intended address in Florida.



For all charts, source: U.S. Department of Commerce





📍 Cayo Costa State Park, Lee County

# Insights & Considerations



## TOWARD A BETTER FLORIDA

Consumer data collected at the end of 2020 showed that compared to our national competitors, the Florida vacation brand entered the recovery from a position of strength. A 2021-22 budget of \$75 million and working in concert with our strategic alliance and industry partners will allow us to press our advantage in the tourism space to help restore small businesses and to create more jobs for Floridians.

As responsible stewards of taxpayer dollars we accept the important role of driving Florida’s economic comeback.

## CONSUMER BEHAVIOR: EASY DOES IT

The convenience culture came of age in 2020.

With pandemic restrictions necessitating revolutionary changes in the marketplace, buying habits were transformed and customer loyalty is now up for grabs.

Consumers moved online in record numbers – Boomers in particular – to buy eggs and exercise equipment, to renovate their new at-home offices. By mid-year 2020, online shopping had grown years-worth in a matter of months.

With airlines grounded and communities in quarantine, wanderlust also went digital. Augmented reality took travelers on virtual vacations to see the Aurora Borealis in Iceland and Tutankhamun’s Tomb in Egypt. In Florida, online travelers toured the Dalí Museum, camped in the Dry Tortugas, and wandered Disney World.

And when the shut-ins just had to get away, they avoided planes, drove their cars, and rented vacation homes. In December, Airbnb became the most-valued travel company in the world – without owning any of the properties available on its platform.

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Our goal is focused and ambitious: Beat the projections.

VISIT FLORIDA has spent the past year strategically navigating the best ways to inspire travel in a time when people were staying home. We have learned a lot and we will continue to innovate our approach as traveler behavior evolves. We are committed to delivering the most significant economic recovery this state has ever seen.

Here are six insights that will inform our mission.

Five years of innovation arrived in five months. Consumers now have greater flexibility in their daily lives, says Euromonitor, which studies global consumer markets. “The 9-to-5 workday will be adapted to offer... a 24-hour service culture (that) allows businesses to tailor and provide offerings around consumers’ schedules – always-available virtual services like on-demand workouts and entertainment.”

The gravitation toward convenience meant that 75 percent of consumers reported trying different stores, websites, or brands since COVID-19, according to McKinsey researchers. Going forward this year, Think with Google reports, “more businesses and brands will stop defining digital narrowly as another ‘channel’ for selling things, but instead as an enabler of transformative, user-first experiences that boost loyalty.”

With vaccines and travel demand on the rise, travel agents are being counted on as facilitators. According to *The New York Times*, many “are seeing an unprecedented surge of business, as COVID-19 has given them a new relevancy, thanks largely to the morass of constantly changing rules and restrictions that travelers must





Crystal River

navigate.” For most people, the benefit of enlisting a travel agent extends beyond the convenience factor, having someone else to manage the potential hassles is a no-brainer.

Ease and flexibility will be the traveler’s expectation at every stage – from the planning to the purchase to the vacation itself. Customer loyalty will be riding on it.

## SUSTAINABLE TOURISM PUTS DOWN ROOTS

Deserted office buildings, streets, and skies were a stark visual for many of us marooned at home in 2020, but the global shutdown also gave the environment a break and could represent a reset moment for tourism.

past year’s positive momentum toward cleaner air and water? Economists and consumer market researchers examining the pandemic’s impacts are encouraging a reimagining of the bottom line – a sustainability model that emphasizes profits, plus people and the planet. In their view, brands and communities that rebuild a greener and more equitable world could gain a competitive advantage.

In the United States, carbon emissions decreased by 10 percent or more. “The opportunity right now is that it’s like we’ve had an escape valve,” Jonathon Day, an associate professor in Purdue’s School of Hospitality and Tourism Management, told *Travel Weekly* in March. “We were above or right at capacity in some of our destinations. ... Now, we’ve got a moment to say, is the system working?”

There are visible efforts from our tourism competitors around the world as well as success stories here in Florida.

Since the airborne virus was most dangerous indoors, according to the Centers for Disease Control and Prevention (CDC), the Florida outdoors stood out as a safe refuge. In the weekly and monthly releases of consumer research data, Florida beaches consistently topped the rankings of travelers’ preferred destinations.

Paris is using the pandemic pause to accelerate its plan to become Europe’s greenest city. Major thoroughfares have prohibited or reduced car traffic. 72% of the on-street parking spaces are gone, replaced with bike lanes and restaurants’ outdoor tables. Infrastructure changes in historic squares such as the Place de la Bastille are designed to facilitate more walkers. Visitors are encouraged to use public transportation.

This summer, we expect a rush of visitors. As a state dependent on tourism dollars, we are counting on it.

Saudi Arabia intends to elevate tourism while diversifying its economy away from oil dependency. How far away? The Red Sea Project, a 22-island destination in development with 8,000+ hotel rooms and 1,300 residential properties,

But as a tourism industry that is dependent on a healthy environment as well as visitor volume, can we sustain the

would be the world’s largest destination powered solely by renewable energy.

In the United States, General Motors chief executive Mary T. Barra said the company will introduce 30 electric vehicle models by 2025 and aim to sell only zero-emission cars and trucks by 2035. The Ford F-150, the most popular pickup by a wide margin, will include an electric version by mid-2022.

And here in Florida, the DeSantis administration has advanced water quality, quantity, and delivery – which will benefit residents, visitors, and the state’s tourism-driven economy.

The governor appointed the state’s first Chief Science Officer and the state’s first Chief Resilience Officer. He created the Blue Green Algae and Red Tide task forces. Perhaps most importantly, the administration has worked with the legislative leadership to craft policy solutions to myriad water crises, while ensuring record funding for Everglades restoration and water infrastructure.

The bills include the Clean Waterways Act, the Environmental Accountability Act, Statewide Flooding & Sea-Level Rise Resilience, and the Reclaimed Water Act. Individually and cumulatively, these bodies of law are already affecting major advancements in habitat restoration and major improvements in terms of treating and recycling stormwater and wastewater.

## REBUILDING BELIEF

Our economic recovery will depend on a strategic restoration of the Florida tourism brand. In addition to sunshine and beaches, we will be marketing trust.

Fair or unfair, negative media coverage valued at \$107 billion cast Florida in a critical light during the pandemic. But Florida was not alone.

The crisis of confidence was widespread as consumers globally lost faith in government, business, and media. The Edelman Trust Barometer, which has been measuring public sentiment for 21 years, pinned the blame on “an epidemic of misinformation and widespread mistrust of societal institutions and leaders around the world.”

Coincidentally, in a consumer survey of 2,000 adults in the United States, United Kingdom, and

This administration has the state on track to preserve its title as the Fishing Capital of the World, while increasing supplies of clean fresh water for residents and visitors.

Tourism can be a force for good as well as a force for growth, to use the language of the moment. The United Nations’ World Tourism Organization says that tourism, which represents 10% of world GDP and 1 out of every 10 jobs, “has the potential to contribute to inclusive and sustainable economic growth, sustainable consumption and production, and the sustainable use of oceans and marine resources.”

Florida’s tourism industry mirrors those employment figures and, the pandemic year excluded, counts for nearly one-quarter of the state economy.

As we anticipate the return of travelers and focus on returning to pre-pandemic levels as quickly as possible, can we unite behind a goal of reimagining our destinations as welcoming to visitors while also taking care of our neighbors, our infrastructure, and our natural resources? Can we envision Florida as a global leader in sustainable tourism?



Ringling Museum, Sarasota



Australia, almost 9 of every 10 respondents said they crave more authenticity in the advertising messages that target them.

Before booking their first vacation since lockdown, travelers will be keenly interested in reliable ground-level information from destinations all over the world. They will want a sense of security as well as the exciting anticipation of vacation.

Millennials and Gen-Z, a population 139 million strong in America, prefer “real and organic” rather than “perfect and packaged” when it comes to the content they want to see from advertisers. Which explains why more than 50% of Millennials made travel or restaurant plans based on an image or video they saw a friend post on social media.

## COME TOGETHER ON DEI

Diversity, equity, and inclusion (DEI) are matters that require our attention and care. As the leaders of one of the world-renowned vacation destinations, we have a responsibility and an opportunity to model what it means to be a special place welcome to anyone on earth – in our hospitality, in our storytelling, in the celebration of our differences and our common ground.

Promoting DEI is not a political decision, it is simply good for business today and essential for future growth. Consider some numbers from the U.S. Census Bureau as reported by the Brookings Institution:

- > In 2019, more than half of the nation’s population under 16 identified as a racial or ethnic minority – a historical first.
- > As of 2019, people of color are the majority populations in 27 of the 100 largest metropolitan areas, including the major metropolises of New York, Los Angeles, Washington, D.C., and Miami – as well as Dallas, Atlanta, and Orlando.
- > Between 2010 and 2019, the U.S. grew by 19.5 million people – a growth rate of 6.3%. While the white population declined by a fraction of a percent, Latino or Hispanic, Asian-American, and Black populations grew by rates of 20%, 29%, and 8.5%, respectively.
- > In the next 20 years, significant growth is expected from the Asian, Black, and Hispanic segments.

Destinations can tell that story themselves, but believability will rest in visual proof. Thus, every traveler will have an influential voice in shaping how potential travelers view a destination.

We should look to develop “trust creators” – local Floridians, content creators, and family and friends – who can play an ambassadorial role in persuading others to make Florida their choice for travel. It will be more important than ever to partner with brands that have built-in faithful audiences and with influencers who publish authentic content aimed at highly engaged and loyal followers.

Word-of-mouth marketing, the most trusted form of consumer communication, can vouch for Florida’s safe outdoors, family-friendly attractions, and the cultural experiences that have skipped a year of our lives.

In the face of these facts and disparities at their own leadership levels, numerous multinational brands have announced new DEI commitments.

Hilton plans to achieve gender parity in leadership positions around the world and have 25% ethnic diversity in U.S. leadership roles by 2027. Facebook, McDonald’s, and Marriott have made similar promises by 2025.

VISIT FLORIDA prioritizes diversity and inclusion in its advertising and storytelling and it partners with agencies that help guide our marketing strategies and raise our mindfulness around the preferences of travelers of color.

In Florida, roughly 5.7 million of our neighbors are Hispanic, 3.4 million are Black, 650,000 are Asian. Among all ethnic groups, 3 million Floridians are disabled and 1 million identify as LGBTQ+. These in-state travelers can help grow the Florida vacation brand. Consider the overlapping groups above – perhaps as many as 10- or 11-million residents – and how they might be deployed as a vital source of word-of-mouth marketing.

DEI is more than having representative images of people in our creative campaigns and more than just celebrating related holidays. In marketing, being authentically nuanced to the uniqueness of each group is the goal and doing so has to come from the people who live those experiences every day.

## BRAND PRODUCT + GOOD STORYTELLING = RETURN AUDIENCE

Episodic brand content, a series of video stories that showcase Florida destinations through a fictional narrative arc, will be a vital marketing tool this year to engage potential travelers. In fact, we’ve already started.

But first, some background plot:

- > Consumers are spending more and more of their time streaming video – eight hours daily at the height of the pandemic.
- > JD Power reports that as of December 2020, the typical American household subscribed to four streaming services (as recently as 2018, it was just Netflix).
- > That open spigot of content from big and small screens also deluges viewers with 6,000 to 10,000 ads a day.

All of which beg the question: In that sea of sameness, how do brands make content that is unforgettable? A TV drama that went off the air in 2017 left clues.

Netflix’s *Bloodline* turned viewers’ attention to its dramatic locations – the Florida Keys and specifically Islamorada. Subsequent market research concluded that *Bloodline* made people more curious about the Keys and increased their intent to visit. The numbers were undeniable: 39,000 incremental visits and \$65 million in travel spending, according to a Monroe County Tourism Development Council study.

Film-induced tourism has been an often-overlooked driver of destination visitation. Dyersville, Iowa, hosts tens of thousands of annual visitors who come to experience the baseball diamond in “Field of Dreams.” Women have flocked to New York City for “Sex in the City”-themed vacations. And people have traveled to faraway places such as Croatia and New Zealand to set foot on the fictional lands of “Game of Thrones” and “Lord of the Rings.”

Big-name advertisers have been placing their products in major motion pictures for

decades. Now brands are taking control of their own stories.

VISIT FLORIDA for years has parlayed relationships with brand-name print and digital publishers – New York Times, National Geographic, Scary Mommy to name a few – into successful programs that target important audiences and present co-op opportunities for our Florida destination partners.

Original programming converts our product into a memorable experience and creates a return audience. Viewers prefer a story with a beginning, middle, and end. The research proves the point: Brand content, packaged as a narrative rather than a commercial, prompts 22 times more engagement than the typical ad.

The time is now for this new strategy. By 2022, people who subscribe to video streaming services in the United States will number nearly 200 million. Also by 2022, videos will account for 82% of all digital consumer website traffic.





Roku, a streaming platform in more than 50 million American households, is debuting a branded content studio sometime this year. Entertainment companies such as Disney, NBCUniversal, WarnerMedia, and ViacomCBS are prioritizing streaming; more and more advertising dollars are shifting from TV to digital.

But, as Jay Acunzo, a content marketing thought leader, says: “Great marketing isn’t about who arrives. It’s about who stays.”

## FLORIDA VACATIONS WITHOUT LIMITS

61 million American adults, or one in four, have a disability that impairs mobility, cognition, hearing, vision, and/or their ability to live independently. As Boomers age, the number will grow. But travel is an innate human desire and underestimating this population as a part of the tourism economy is a mistake: Disabled Americans take vacations and the most accommodating destinations will win them.

The Open Doors Organization (ODO), which teaches businesses how to succeed in the disability market while simultaneously empowering the disability community, reported that in 2018-19, more than 27 million travelers with disabilities took 81 million trips and spent \$58.7 billion. Yet Eric Lipp, ODO’s executive director, told the 2020 TTRA Marketing Outlook Forum that “the true economic

Toward that end, *Life’s Rewards* is streaming on Amazon Prime Video and YouTube. This eight-episode series, a VISIT FLORIDA collaboration with Miles Partnership, Visit St. Pete/Clearwater, and the St. Pete/Clearwater Film Commission, debuted at the Sunscreen Film Festival in May.

What’s next? Stay tuned.

impact is higher, potentially even double, since people with disabilities typically travel with one or more other adults.”

Overshadowed by the pandemic, the 30th anniversary of the Americans with Disabilities Act passed quietly in Summer 2020. *Forbes* magazine wrote at the time: “So much of what we take for granted in our built environment today – like ramps into buildings, grab bars in restrooms, elevators with Braille buttons, and spoken floor numbers – was mandated by that groundbreaking legislation.”

Florida, the nation’s top travel destination, has extensive resources for visitors with special needs, but we still can do much better.

Access to information for travelers with disabilities can be challenging to find and misleading, which at times leads to a big gap between the plan and the experience. As researchers in the field note: “Much in the accessibility world is defined by the provider, not the (disabled) consumer,” which means that the recommendations and advice from like travelers is especially important.

Reliable intelligence about travel destinations is a must for families with children with unique abilities. In the United States, the CDC estimates that one of every six children aged 3 to 17 has one or more developmental disabilities, such as attention-deficit/hyperactivity disorder (ADHD), autism, and intellectual disabilities.

From Jake Steinman, editor-in-chief of INBOUND, an industry newsletter: “DMOs are in charge of long-range planning and they need to fast-forward five to 10 years from now when 25% of the Baby Boomers with time and money to travel will have aged into a disability.”

While many of Florida’s gateway cities have earned reputations as accessible destinations – Visit Tampa Bay now has an accessible travel advisor and VISITFLORIDA.com has a content hub for disabled travelers – a one-stop comprehensive tool that allows the disabled traveler to plan a Florida vacation remains a missed opportunity. The clock is ticking.

Some researchers are expecting a “Silver Surge.” Florida is already a highly-desired destination among older Americans, and according to the U.S. Census that market is only growing: “By 2034, there will be 77 million people 65 years and older compared to 76.5 million under the age of 18.” The CDC confirms the difficult reality that two of five adults 65 years and older will have a disability.

“For the disabled, travel is a commando raid,” Steinman said in INBOUND. “Travel involves getting from point A to point B – from home to the destination – that is an arduous and stressful journey for people who are ‘abled,’ so you can imagine what it’s like for those with a disability.”

“Disability blogger Cory Lee Woodard recounted the intense preparation and contingency planning he had undertaken before a long-haul flight. ... He doesn’t eat or drink for 36 hours before takeoff so he won’t have to use the bathroom. And then he still has to worry about his motorized wheelchair arriving undamaged.”

Friends and family who host these travelers are also important sources of information on local amenities and things to do for this segment. Leveraging Florida hosts could be a key opportunity for marketing.

It’s our responsibility to move Florida to a place where we are fully integrating differently abled travelers into the full spectrum of vacation experiences. That’s Brightening the Lives of All.





U.S. Navy Blue Angels, Pensacola

# Marketing Approach

## THE WAY FORWARD

In the year ahead we will continue our efforts to support and lead the Florida tourism industry in recovering from the pandemic. That means developing the most comprehensive cooperative marketing program in VISIT FLORIDA's history. We will tell destination stories under a unified brand and protect our industry by promoting in-state travel during Florida's typical slowest travel season.

Domestic visitors will sustain us through 2021. We will invest the majority of our resources courting them.

### IN THIS SECTION

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Marketing Tactics	40
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At the same time, as one of the only state destinations that kept pushing forward beyond our borders, we will lean into those efforts to maintain a strong pipeline of international visitors. And above all, we will continue to innovate to meet the moment and whatever challenges it may bring.

Finally, while we are thrilled to get this recovery started, we must take care in managing the experiences of our visitors and the impact of travel on our infrastructure and fellow Floridians. We are in this together for the long haul.

Welcome back to the No. 1 vacation destination in the world.

## INTERNATIONAL PHASES OF TRAVEL READINESS



*These are not blanket statements about all consumers, just those likely to travel within our top markets. Travel considerations are impacted by vaccine availability, percentage of vaccinated population, country entry requirements like proof of vaccine or quarantine/testing policies.*



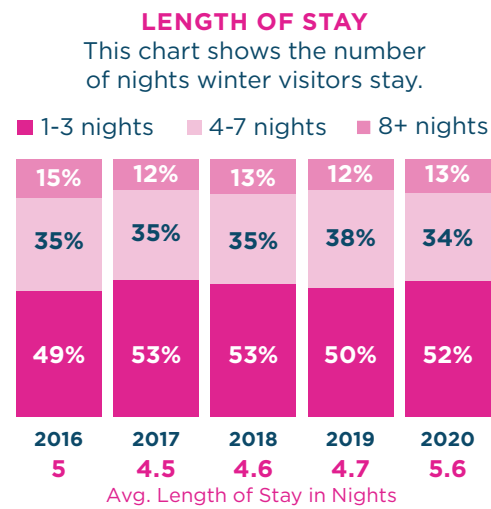
# MARKETING APPROACH

For planning purposes, below is a high-level overview of VISIT FLORIDA's FY21-22 market approach. This plan and the tactics that follow are subject to change based on VISIT FLORIDA's level of funding, strategic initiatives, and destination accessibility.

Note: VISIT FLORIDA's fiscal year begins in July and ends in June the following calendar year. Dashed lines represent campaigns that continue throughout the year.

	JUL '21	AUG '21	SEP '21	OCT '21	NOV '21	DEC '21	JAN '22	FEB '22	MAR '22	APR '22	MAY '22	JUN '22
DOMESTIC AUDIENCES	LATE SUMMER											
	DESTINATION CO-OP											
	WINTER											
	FAMILIES											
	LOVEFL											
INTERNATIONAL CAMPAIGNS	ALWAYS ON Domestic & International	<div style="display: flex; justify-content: space-between;"> <span>CONTENT</span> <span>PUBLIC RELATIONS</span> <span>PROMOTIONS</span> <span>SOCIAL</span> <span>TRAVEL TRADE</span> <span>COOPERATIVE MARKETING</span> </div>										
	CANADA											
	UK											
	LATIN AMERICA											
	GERMANY											

## WINTER VISITOR PROFILE



### GENERATION

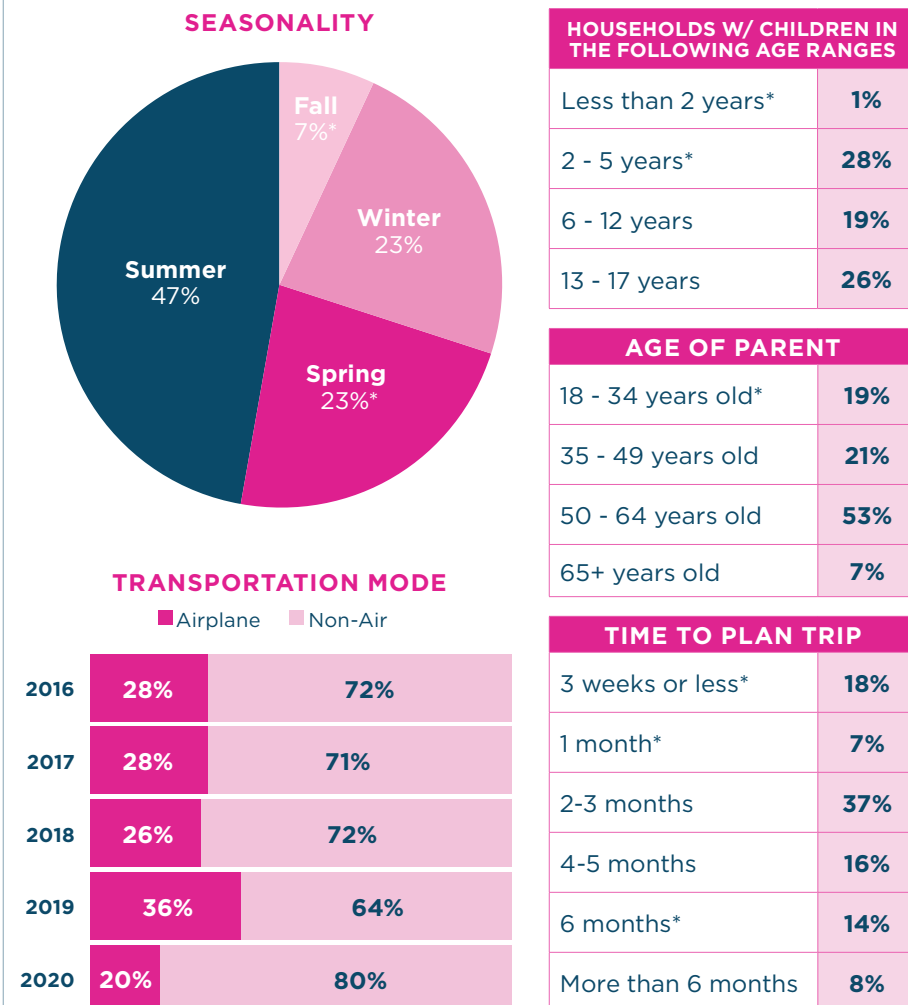
Silent/G.I.	8%
Baby Boomer	43%
Gen X	26%
Millennial/Gen Z	22%

### LODGING TYPE

Paid Accommodation	73%
Hotel	37%
Non-Hotel	35%
Non-Paid Accommodation	27%

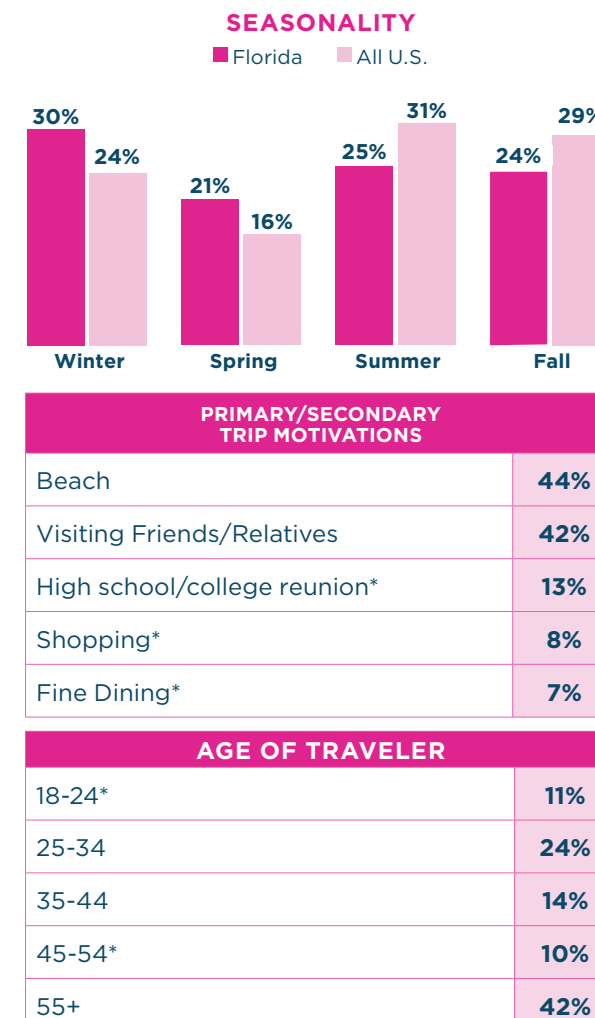
Source: D.K. Shifflet

## FAMILY PROFILE



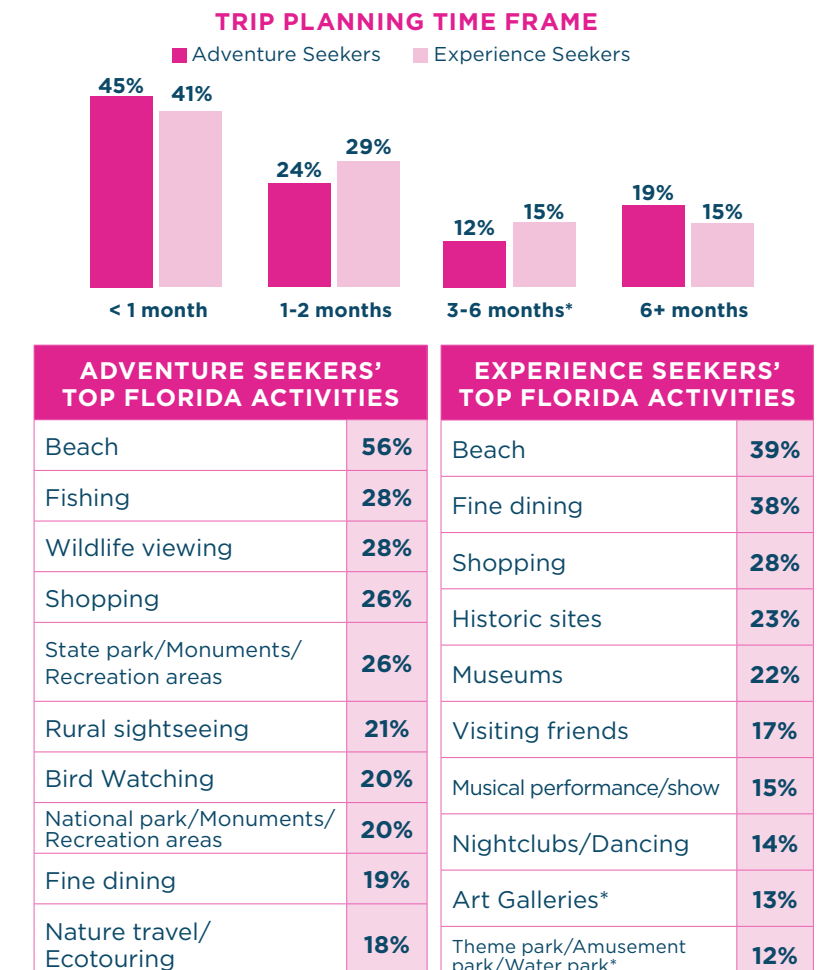
Source: D.K. Shifflet

## IMPULSE GETAWAY PROFILE



Source: TravelTrak America  
Values are preliminary and subject to change.

## EXPERIENCE & ADVENTURE SEEKER PROFILES



Source: TravelTrak America  
Values are preliminary and subject to change. \* Small sample sizes.  
All charts on pages 38-39 represent domestic travelers to Florida in 2020



# MARKETING TACTICS

## STRATEGY 1 DRIVE MEANINGFUL DEMAND

- > Continue COVID-19 rebound campaign efforts domestically and in-state.
- > Create integrated campaigns in top domestic markets and markets with growth potential.
- > Create a diverse offering of co-op marketing programs aligned with VISIT FLORIDA's overarching marketing objectives.
- > Develop and sustain marketing partnerships that support brand differentiation, are distinguishing, and memorable.
- > Explore innovative opportunities to elevate Florida from a noisy media environment and differentiate it from the competition.
- > Maintain ongoing search presence (SEO/SEM).
- > Leverage VISIT FLORIDA content for domestic and international marketing efforts.

- > Align collaborative pitching with press visits and media relations.
- > Build and sustain relations with global media and content creators.
- > Collaborate with DMO partners to pitch stories and host media visits that yield a larger awareness footprint to the state.
- > Create campaigns that authentically reach social communities in order to promote awareness, engagement, and advocacy.
- > Leverage best-in-class partnerships to extend the Florida Meetings message through larger channels.
- > Coordinate and execute promotions in key markets to maintain high-level Florida brand awareness.

## STRATEGY 2 OPTIMIZE YIELD

- > Create integrated campaigns in top international markets.
- > Steward relationships with top international trade and consumer media.
- > Develop and grow relationships with tour operators, influential global product managers, receptive operators, and travel agents in key international markets.
- > Coordinate international trade events throughout the year for key markets.
- > Promote educational programming for travel trade.

- > Develop and maintain relationships with airlines and airports to support route recovery and development.
- > Coordinate promotions featuring unique experiences, less traveled destinations, and multi-destination prize packages.
- > Develop and distribute content promoting lesser-known destinations and experiences.
- > Leverage expertise of Welcome Center staff to educate and serve Florida visitors.

## STRATEGY 3 FOSTER BRAND LOVE, LOYALTY, AND CONNECTION

- > Promote engagement with #LoveFL across different audiences and passions.
- > Leverage social conversations to build brand engagement and advocacy.
- > Develop opportunities to connect with local Floridians through LoveFL brand.

- > Foster social conversations related to Florida travel experiences.
- > Create experiences and programs that enhance pride among Floridians.

## STRATEGY 4 SUPPORT AND LEAD OUR INDUSTRY

- > Engage with and educate Partners through marketing consultations and sales calls.
- > Enhance industry communications strategy. Create, manage, and distribute key messaging through email, social, direct mail, and in-person event attendance.
- > Grow Partner benefits platform to provide more exclusive opportunities for VISIT FLORIDA Marketing Partners.
- > Develop programs that deliver education/ thought leadership to the industry.
- > Invest in tools and resources that drive Partner retention and demonstrate value of participation.

- > Increase the value of co-op to Partners by developing year-round, campaign-specific, non-traditional and bundled packages.
- > Rollout dashboard sharing Quality of Life indicators for Florida's tourism industry.
- > Support crisis communication efforts by providing industry direction and support as needed.
- > Facilitate international co-op opportunities for Partners, leveraging the Florida Brand.
- > Engage in conversations with our industry stakeholders to improve our efforts to serve them.









# VISITFLORIDA®



THE OFFICIAL TOURISM MARKETING  
CORPORATION FOR THE STATE OF FLORIDA



 Topsail Hill Preserve State Park, Santa Rosa Beach