

Visitor Profile Survey

September – November 2007

A total of 760 intercept interviews were completed with visitors to the Florida Keys/Key West from September - November 2007. The quota of 50 interviews per district for each month was met or exceeded in each district. The survey data were weighted by visitation figures for each district. There were several new questions added to this survey as explained below. The following provides a brief summary of overall results:

Tripographics:

- The vast majority of respondents drove to their Keys destination (73.6%), though for the past 18 this figure has been down from historic figures. Drive visitors broke down as 36.4% driving directly to the Keys in their own car; 4.3% arriving in a car rented outside of Florida; 17.2% flying into Miami and then driving a rental car down; and finally 12.6% flying into another airport in Florida and then driving a rental car down.
- The majority of respondents reported that their primary purpose for visiting the Keys was recreation or vacation (76.2%), followed by Visit Friends and Family (12.7%) and Business/Pleasure Combined (6%). During hurricane season, Business/Pleasure combined trips were lower than this winter and spring.
- Most respondents planned their Keys vacation one to three months in advance (33.3%). For about 11% respondents, the trip was planned last minute (one week or less planning time). There were more long terms planners of 4-6 months than last quarter (21% vs. 17%)
- 15% of respondents used a travel agent. Among respondents who used travel agent services, most did so for air reservations (86%) indicating the difficulty in finding available, affordable flights may be persuading more consumers to utilize travel agents. Travel agents were also utilized by these respondents for hotel reservations (83%) and car reservations (66%). The percentage of respondents who utilized a travel agent for planning their vacation and also reported that a travel agent recommended the Florida Keys & Key West was much higher than prior quarters at 52%. This would seem to suggest sales campaigns to boost travel agent room nights are making a positive impact.
- The average visitor spent \$306 a day; including \$150 on their accommodations, \$19 on transportation within the county, \$21 on water-based activities, \$27 on land-based activities, \$94 on food & beverages and \$25 on other miscellaneous expenses.
- The average length of stay was 5 nights. The average party size was 3.43 in total, including 0.44 children, higher than our historic average of 3. The most popular travel party size was two people (44%), closely followed by three to five people 39%.
- When asked how the visitor made his/her accommodations reservation, among those respondents who had made reservations, the most popular response was one-line through a travel web site (31%). This marks a continued change observed throughout the year in booking trends. This year, for the first time since hotels' internet lowest price guarantees became popular, 3rd party online travel agents are surpassing booking directly with a property.

- Most visitors stayed at a hotel/motel/resort (59%); followed by B&B/guest house/Inn (22%), campground/RV park (7%) and vacation rental (6%).
- Visitors most often engaged in a culinary and/or nightlife experience during their vacation (97%). Enjoying sightseeing activities and other attractions was the second most popular activity (92%), followed in the top five by visiting a beach (87%), museums/historic areas (72%) and viewing wildlife (64%). This year we added the activity of attending a wedding or commitment ceremony which 9% reported participating in.

Psychographics

- The vacation experience most visitors were primarily seeking (i.e. the Top Motivator) was to “relax and escape, get away from stress, reconnect with friends or family” (44%). The second highest reason continues to be, “to go somewhere new” (12%). Moving up to third place was “culture & history”.
- 72% of respondents recalled seeing some type of advertising in the past three months. Magazine had the highest media source recall (21.2%), followed by Internet (14%), Television (12%) and Newspaper (11%).

Demographics

- Average age was 41. 13 percent of adult visitors were Generation Y (age 18-25), 49% Generation X (age 26-45) and 38% were Baby Boomers (age 46-65). The majority of visitors were non-Hispanic white (70%), followed by Latino (22%), Africa-American (6%) and Asian (2%). 54% were male, while 46% were female.
- This year we added a question asking visitor sexual orientation. 88% of respondents were heterosexual, 7% gay, 3% lesbian and <1% bi-sexual. The remaining <2% declined to answer the question.

TRIOGRAPHICS

Transportation to Keys	September 07- November 07		June 07 August 07		March 07- May 07		December 06- February 07	
	Frequency	Percent	Frequency	Percent	Frequency	Percent	Frequency	Percent
Drive Own Vehicle	268	35.4	272	36.1	269	36.8	264	34.9
Fly to Key West	119	15.8	99	13.2	108	14.8	118	15.6
Drive Rental Vehicle	32	4.3	37	5	31	4.2	25	3.3
Fly to Miami, Drive	130	17.2	154	20.5	158	21.7	162	21.4
Fly to Other FL Airport, Drive	95	12.6	76	10.1	90	12.3	94	12.5
Fly to Marathon	65	8.5	67	8.9	40	5.3	63	8.4
Tour Bus	32	4.2	28	3.7	28	3.8	19	2.5
Other	16	2.1	20	2.6	7	1	12	1.5

Transportation	September 07- November 07		June 07 August 07		March 07- May 07		December 06- February 07	
	Frequency	Percent	Frequency	Percent	Frequency	Percent	Frequency	Percent
Auto	558	73.6	567	75.4	575	78.7	563	74.5
Air	184	24.3	166	22	149	20.3	181	23.9
Other	16	2.1	20	2.6	7	1	12	1.5

Purpose of Trip	September 07- November 07		June 07 August 07		March 07- May 07		December 06- February 07	
	Frequency	Percent	Frequency	Percent	Frequency	Percent	Frequency	Percent
Recreation or Vacation	577	76.2	557	74.1	491	64.7	522	69
Visiting Family or Friends	96	12.7	122	16.2	149	19.6	118	15.6
Business/Pleasure Combined	45	6	44	5.8	77	10.1	76	10.1
Convention or Meeting	18	2.4	12	1.6	27	3.5	31	4
Other	21	2.8	17	2.3	16	2.2	9	1.2

Lead Time for Trip Planning	September 07- November 07		June 07 August 07		March 07- May 07		December 06- February 07	
	Frequency	Percent	Frequency	Percent	Frequency	Percent	Frequency	Percent
1 Week	83	10.9%	109	14.5%	101	13.2%	97	12.9%
2-4 Weeks	187	24.7%	218	29.0%	168	22.1%	161	21.3%
1-3 Months	252	33.3%	228	30.4%	294	38.7%	321	42.5%
4-6 Months	160	21.1%	125	16.6%	126	16.5%	111	14.7%
More than 6 Months	76	10.0%	72	9.6%	72	9.5%	66	8.7%

14.7% Used Travel Agent for...	September 07- November 07		June 07 August 07		March 07- May 07		December 06- February 07	
	Frequency	*Percent of cases	Frequency	*Percent of cases	Frequency	cases	Frequency	Percent
Airline Reservations	95	85.7%	89	79.4	133	91.3%	130	36.3
Hotel Reservations	92	82.9%	84	75	114	78.5%	97	27
Rental Car Reservations	73	65.8%	62	55.3	93	63.8%	70	19.4
Recommend Keys/Key West	58	51.9%	46	41.5	70	47.8%	47	13
Other Service	8	7.1%	10	9.2	10	6.6%	16	4.4

*note: March 07- May 07, percent of responses was replaced with percent of cases

Average DAILY Trip Expenditures	September 07- November	June 07 August 07	March 07- May 07
	Total Avg.	Total Avg.	Total Avg.
Lodging	\$120	\$127	\$146
Transportation	\$19	\$21	\$29
Water-Related Activities	\$21	\$21	\$28
Land-Based Activities	\$27	\$24	\$31
Food & Beverages	\$94	\$100	\$90
All Other	\$25	\$20	\$28
Total Average Daily Expenditures	\$306	\$313	\$378

Average TOTAL Trip Expenditures	September 07- November	June 07 August 07	March 07- May 07
	Total Avg.	Total Avg.	Total Avg.
Lodging	\$656	\$723	\$670
Transportation	\$96	\$109	\$143
Water-Related Activities	\$104	\$100	\$143
Land-Based Activities	\$129	\$115	\$139
Food & Beverages	\$516	\$545	\$459
All Other	\$116	\$90	\$138
Total Average Daily Expenditures	\$1,617	\$1,682	\$1,692

Travel Party

Party Size	Avg.	Kids under 18	Avg.	Kids under 18	Avg.	Kids under 18
	3.43	0.44	3.7	0.71	3.9	0.55

Number of Travelers

Number in party	Percentage	Number in party	Percentage	Number in party	Percentage
1	5.3%	1	5.0%	1	4.8
2	44.0%	2	41.6%	2	44.8
3-5	38.5%	3-5	37.4%	3-5	36
6-10	9.7%	6-10	13.3%	6-10	9.1
11-20	2.2%	11-20	2.6%	11-20	4.1
21-30	0.3%	21-30	0.1%	21-30	0.7
31+	0.0%	31+	0.0%	31+	0.3

Accommodations Reservation	September 07- November 07		June 07 August 07		March 07- May 07		December 06- February 07	
	Frequency	Percent	Frequency	Percent	Frequency	Percent	Frequency	Percent
Used a Travel Agent	96	12.7%	103	13.7%	123	16.2%	100	13.2%
Used a reservation service by phone	45	6.0%	59	7.8%	39	5.1%	44	5.8%
Made direct call to property	115	15.1%	140	18.7%	170	22.3%	259	34.3%
On-line through a travel web site	232	30.6%	230	30.6%	189	24.8%	101	13.4%
On-line through property's web site	100	13.2%	94	12.4%	76	10.0%	112	15.8%
Made no advance reservation	127	16.7%	96	12.8%	124	16.3%	107	14.2%
Other	43	5.7%	30	4.0%	40	5.3%	33	4.3%

Lodging Type	September 07- November 07		June 07 August 07		March 07- May 07		December 06- February 07	
	Frequency	Percent	Frequency	Percent	Frequency	Percent	Frequency	Percent
Hotel/Motel/Resort	446	58.9	437	58.1	436	57.3	427	56.5
B&B/Guest house/Inn	168	22.2	163	21.7	173	22.8	164	21.7
Seasonal/Vacation Rental	45	5.9	48	6.4	50	6.6	63	8.3
Campground/RV Park	55	7.3	52	7	52	6.8	50	6.7
Other	43	5.7	51	6.7	49	6.5	51	6.8

Recreational Activities	September 07- November 07		June 07 August 07		March - May 2007		December 06 -February 2007	
	Frequency	Percent of Cases	Frequency	Percent of Cases	Frequency	Percent of Cases	Frequency	Percent of Cases
Diving	121	16.0%	139	18.5%	107	14.1%	189	25.2%
Snorkeling	274	36.1%	298	39.6%	263	34.6%	321	42.9%
Fishing	145	19.1%	208	27.7%	185	24.3%	195	26.0%
Viewing Wildlife	483	63.8%	436	58.0%	439	57.8%	458	61.1%
Boating	306	40.4%	356	47.4%	335	44.0%	395	52.3%
Beach Activities	659	87.0%	660	87.8%	649	85.4%	684	91.3%
Dine Out/Night Life	734	96.9%	694	92.3%	720	94.8%	722	96.3%
Museums/Historic Areas	545	71.9%	518	69.0%	482	63.4%	478	63.8%
Sightseeing & Attractions	697	92.0%	627	83.4%	640	84.3%	637	85.0%
Cultural Events	451	59.6%	442	58.8%	384	50.5%	397	53.0%
Wedding or Commitment Ceremony	67	8.8%	143	19.1%	27	3.5%		

PSYCHOGRAPHICS

PRIMARY experience sought,

i.e. motivation for decision to travel the Keys

Note: Respondents may only select ONE experience, the TOP motivator

Relaxation and escape, de-stressing, reconnecting with friends and family

Scuba Diving

Fishing

Soft adventure, e.g. kayaking, snorkeling, wildlife, beaching

Culture & history, e.g. museums, historic architecture, cultural cuisine

Fine Arts & Performing Arts, e.g. theatre, art, music, crafts, film

Sunshine, i.e. warm, sunny, mild weather. A better climate

New experiences, i.e. to go somewhere new

Prestige, i.e.. high quality accommodations & tourism product cleanliness

Safety & Convenience, i.e. safe area, convenient to travel to

Value, i.e. a good value for the cost of trip. A bargain or special deal

Family, i.e. lots of things for a family to do, family friendly

Romance, i.e. romantic location to share with loved one or find new love

Other

Don't know/No Answer

September 07- November 07

Frequency	Percent	Rank 1-12	June 07 August 07	Frequency	Percent
332	43.8	1	393	52.3	
8	1.0	12	14	1.9	
16	2.1	8T	40	5.3	
36	4.8	6T	34	4.5	
53	7.0	3	10	1.3	
4	0.5	13	0	0.1	
14	1.9	9	9	1.2	
88	11.6	2	70	9.3	
13	1.7	11	13	1.7	
16	2.1	8T	19	2.5	
14	1.8	10	12	1.6	
36	4.7	7	42	5.5	
45	6.0	5	56	7.4	
47	6.2	4	16	2.1	
37	4.8	6T	25	3.3	

Sought

during Keys vacation and activities

Note: respondents may answer affirmative to multiple experiences

Relaxation and escape, de-stressing, reconnecting with friends and family

Scuba Diving

Fishing

Soft adventure, e.g. kayaking, snorkeling, wildlife, beaching

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September 07- November 07

Frequency	Percent	Rank 1-12	June 07 August 07	Frequency	Percent
749	98.9	1	733	97.7	
75	9.9	13	105	13.9	
93	12.3	12	168	22.4	
577	76.2	4	549	73.2	
563	74.4	5	484	64.6	
491	64.8	7	436	58.1	
652	86.1	2	623	83.1	
540	71.2	6	560	74.7	
579	76.5	3	540	71.9	
480	63.4	8	556	74.2	
405	53.5	9	430	57.3	
155	20.5	11	238	31.8	
289	38.2	10	286	38.1	

Recall Ads Past 3 Months	September 07- November 07		June 07 August 07		March 07- May 07		December 06- February 07	
	Frequency	Percent	Frequency	Percent	Frequency	Percent	Frequency	Percent
No	280	27.8	202	26.8	213	28.1%	206	27.3%
Yes, Television	116	11.6	146	19.4	145	19.0%	103	13.6%
Yes, Radio	82	8.2	91	12.1	91	11.9%	57	7.5%
Yes, Magazine	180	17.9	187	24.8	161	21.2%	121	16.0%
Yes, Newspaper	107	10.6	152	20.2	107	14.0%	84	11.2%
Yes, Internet	137	13.7	168	22.3	224	29.5%	182	24.1%
Yes, But Don't Recall Where	103	10.2	147	19.6	145	19.0%	210	27.7%

Demographics

Household Income	September 07- November 07		June 07 August 07		March 07- May 07		December 06- February 07	
	Frequency	Percent	Frequency	Percent	Frequency	Percent	Frequency	Percent
Under \$75,000	341	54%	347	55%	339	55%	330	60%
\$75,000 or more	293	46%	288	45%	275	45%	216	40%
Refused	124	---	210	---	146	---	210	---

Age	September 07- November 07		June 07 August 07		March 07- May 07		December 06- February 07	
	Frequency	Percent	Frequency	Percent	Frequency	Percent	Frequency	Percent
18-25	94	12.5	94	12.7	113	15.3%	88	12.0%
26-35	192	25.5	194	26.2	158	21.3%	189	25.8%
36-45	177	23.5	181	24.4	190	25.6%	192	26.1%
46-60	195	25.9	195	26.3	177	23.8%	185	25.3%
61+	94	12.5	76	10.3	104	14.0%	79	10.7%
No Answer	6		13		18		23	
Average Age	41		40		42		41	

Ethnicity	September 07- November 07		June 07 August 07		March 07- May 07		December 06- February 07	
	Frequency	Percent	Frequency	Percent	Frequency	Percent	Frequency	Percent
Non-Hispanic White	526	69.5	524	69.7	533	70.6%	533	70.6%
African American/Black	45	5.9	49	6.5	36	4.8%	36	4.8%
Hispanic/Spanish/Latino	164	21.6	165	22.0	148	19.6%	148	19.6%
Asian or Pacific Islander	16	2.1	12	1.6	13	1.7%	13	1.7%
American Indian or Alaska Native	6	0.8	0	0.1	7	1.0%	7	1.0%
Other	1	0.1	2	0.2	19	2.5%	19	2.5%

Sexual Orientation	September 07- November 07		June 07 August 07		March 07- May 07	
	Frequency	Percent	Frequency	Percent	Frequency	Percent
Heterosexual	669	88.3	633	84.2	193	78.8
Gay	50	6.7	58	7.7	13	5.1
Lesbian	23	3.0	23	3.1	15	6.3
Bi-Sexual	1	0.2	7	0.9	3	1.1
Refused	13	1.8	27	4.1	21	8.7

Gender	September 07- November 07		June 07 August 07		March 07- May 07	
	Frequency	Percent	Frequency	Percent	Frequency	Percent
Male	411	54.2	422	56.1	374	49.2
Female	347	45.8	330	43.9	386	50.8

Repeat Visitor	September 07- November 07		June 07 August 07		March 07- May 07	
	Frequency	Percent	Frequency	Percent	Frequency	Percent
Yes	419	55.3	436	57.9	388	51.1
No	339	44.7	317	42.1	372	48.9

State of Origin	September - November 2007			June - August 2007			March - May 07			December 06 February 07		
	Ranking	Frequency	Percent	Rankin	Frequency	Percent	Ranking	Frequency	Percent	Frequency	Percent	
Florida	FL	1	208	27.4	1	239	31.7%	1	222	29.3%	1	195
New York	NY	2	22	2.9	6	14	1.9%	2	29	3.9%	3	22
New Jersey	NJ	3	20	2.6	2	29	3.8%	9	12	1.6%	5	21
Georgia	GA	4	16	2.2	7	13	1.7%	5	18	2.3%	10	14
Massachusetts	MA	5	15	2	12	10	1.3%	7	15	2.0%	6	18
Louisiana	LA	6	15	2	17	8	1.1%	12	10	1.3%	34	3
Pennsylvania	PA	7	14	1.9	4	18	2.3%	20	7	0.9%	7	18
Connecticut	CT	8	14	1.9	18	7	0.9%	11	10	1.3%	9	15
Minnesota	MN	9	14	1.9	45	1	0.2%	15	9	1.2%	35	3
Illinois	IL	10	13	1.8	5	14	1.8%	6	18	2.4%	2	24
Ohio	OH	11	11	1.6	8	13	1.7%	4	20	2.6%	4	22
Michigan	MI	12	12	1.6	13	10	1.4%	3	26	3.4%	8	17
Tennessee	TN	13	11	1.5	15	9	1.2%	22	6	0.7%	29	4
California	CA	14	11	1.4	3	18	2.5%	14	9	1.1%	12	13
Texas	TX	15	11	1.4	9	13	1.8%	23	6	0.8%	21	7
Alabama	AL	16	10	1.4	20	6	0.8%	13	9	1.2%	40	2
South Carolina	SC	17	10	1.3	14	9	1.2%	28	5	0.6%	24	5
Wisconsin	WI	18	9	1.2	49	1	0.1%	29	5	0.7%	17	8
North Carolina	NC	19	8	1.1	11	11	1.4%	10	11	1.4%	13	13
Maryland	MD	20	9	1.1	21	6	0.8%	24	5	0.7%	15	8
Wyoming	WY	21	1	1.1	36	3	0.4%	50	1	0.1%	45	2
Missouri	MO	22	7	1	10	12	1.6%	8	14	1.8%	11	14
Kentucky	KY	23	8	1	34	3	0.5%	19	7	0.9%	22	6
Alaska	AK	24	7	1	42	1	0.1%	30	4	0.6%	31	3
Arizona	AZ	25	7	0.9	27	4	0.6%	16	8	1.0%	32	3
West Virginia	WV	26	6	0.9	41	2	0.3%	38	4	0.5%	44	2
Maine	ME	27	6	0.8	29	4	0.5%	21	6	0.8%	20	7
Colorado	CO	28	6	0.8	37	2	0.3%	17	8	1.1%	18	7
Iowa	IA	29	5	0.8	n/a	0	0.0%	n/a	0	0.0%	23	5
Indiana	IN	30	4	0.6	19	7	1.0%	18	8	1.1%	19	7
Montana	MT	31	5	0.6	39	2	0.2%	31	4	0.5%	36	3
Delaware	DE	32	4	0.5	28	4	0.6%	47	1	0.2%	26	4
Kansas	KS	33	4	0.5	38	2	3.0%	39	3	0.4%	33	3
Vermont	VT	34	4	0.5	40	2	0.3%	45	2	0.3%	n/a	0
Mississippi	MS	35	4	0.5	46	1	0.1%	43	2	0.3%	47	1
Nevada	NV	36	3	0.4	23	5	0.6%	33	4	0.5%	42	2
New Hampshire	NH	37	3	0.4	35	3	0.4%	26	5	0.7%	14	9
Oregon	OR	38	2	0.3	22	6	0.9%	40	3	0.4%	28	4
Nebraska	NE	39	2	0.3	30	4	0.6%	25	5	0.6%	37	3
Utah	UT	40	3	0.3	n/a	0	0.1%	36	4	0.5%	39	3
Oklahoma	OK	41	1	0.2	24	5	7.0%	34	4	0.6%	27	4
Rhode Island	RI	42	1	0.2	25	5	0.6%	27	5	0.7%	43	2
Arkansas	AR	43	1	0.2	26	4	0.5%	41	2	0.3%	41	2
Washington	WA	44	2	0.2	32	4	0.5%	37	4	0.6%	30	4
South Dakota	SD	45	1	0.2	48	1	0.1%	35	4	0.5%	38	3
District of Columbia	DC	46	1	0.1	43	1	0.1%	46	1	0.2%	25	4
Virginia	VI	n/a	0	0	16	9	1.2%	49	1	0.1%	n/a	0
New Mexico	NM	n/a	0	0	31	4	0.5%	44	2	0.3%	16	8
Idaho	ID	n/a	0	0	33	3	0.4%	42	2	0.2%	46	1
Hawaii	HI	n/a	0	0	44	1	0.1%	48	1	0.1%	n/a	0
North Dakota	ND	n/a	0	0	47	1	0.2%	32	4	0.5%	48	1