



Florida Keys & Keys West Consumer Perception Survey

Italian Market – Spring 2017

Presented by Axis Travel Marketing Ltd.

The
Florida Keys
& Key West
... come as you are®



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The Survey

Objective:

To understand Italian Travel Trade perception of the Florida Keys & Key West.

To identify key trade and consumer motivators and influencers in the Italian market when thinking of the Florida Keys & Key West.

To establish the most efficient marketing channels.

To recognize further trade promotional opportunities outside of TTG Rimini, Showcase USA and Visit USA Italy.

Method:

AXTM created a market survey in the Italian language using an online survey tool. The survey was branded appropriately and sent to **250** tour operators and travel agents on 5th May 2017. AXTM followed up on the request over a period of 2 months to encourage completions.

Branded Survey

The Florida Keys & Key West come as you are®

Con questo breve sondaggio ci aiuterete a capire come la destinazione Florida Keys e Key West sia percepita sul mercato Italiano e che azioni possiamo

start premi INVIO

1 → Florida Keys e Key West: Quali sono le prime 3 cose che vi vengono in mente?

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Per aggiungere un paragrafo, premi SHIFT + INVIO

2 → Quali sono le più importanti e più lette riviste del settore viaggi e turismo in Italia?

3 → Quali sono i migliori canali/eventi per educare gli agenti sulla nostra

0 su 10 risposte

Crea il tuo typeform...



Responses

Response target by 5th July 2017: 20

Actual responses by 5th July 2017: 30

Response rate: 12%

The average response rate for an external survey is between 10 – 15%, AXTM consider a 12% response rate a successful response.

All respondents received a follow up e-mail to thank them for completing the survey and AXTM will ship a small FKKW branded give-away.

One winner has been selected from all surveyed and will receive a FKKW branded hamper containing: beach towel, candles and moleskine notebook.

Question 1:

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AXTM asked the Italian travel trade about the top 3 things they associate with the FKKW.

The survey showed that the sea/ ocean is the top identifier when thinking about FKKW. Taking into account sun and beach came in the top 6 rankings means the Florida Keys are first of all considered a sun, sea and beach destination.

The second position shows how the legendary figure of Ernest Hemingway positively impacts on consumers minds.

The overseas highway and its well renowned landscape is then the third most common association with the FKKW.

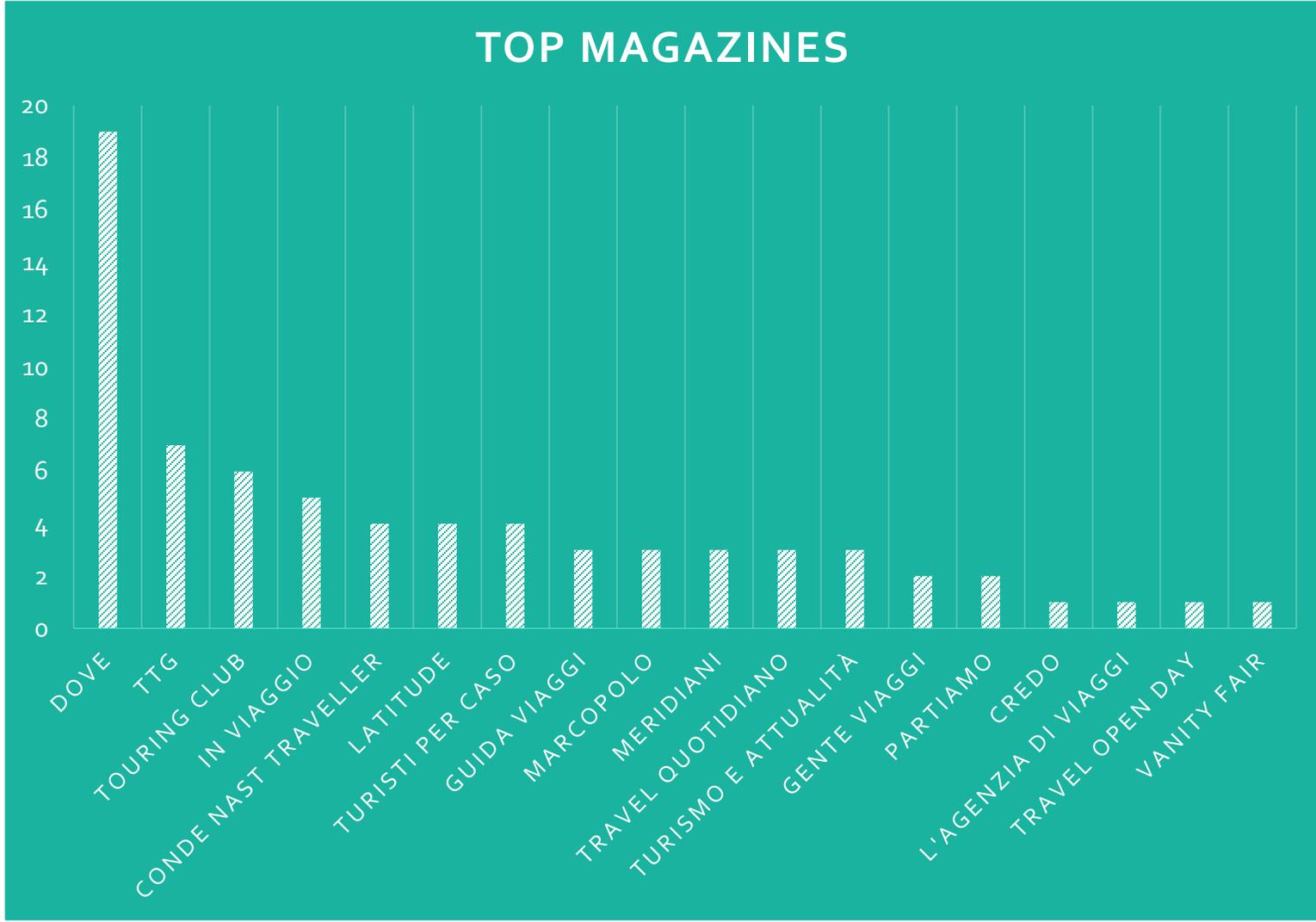
Observations: the nature element of the Keys is well known, but the coral reef, snorkelling and fishing activities are not mentioned as much. The only attractions / famous landmarks nominated are located in Key West. This shows a lack of knowledge in the key attractions on the other parts of the islands.

Sea / Ocean	13
Hemingway	10
Bridge	7
Overseas highway	6
Sun	4
Beach	4
Nature	4
Snorkelling / Coral Reef	3
Relax / Chill	3
Fun	3
Duval / Mallory / Southernmost Point	3
Miami	2
Fishing	2
Fly & Drive	2
Key Lime Pie	2
Disney	1
Carribbean	1
Art	1
Sunset	1



Question 2:

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The survey showed that the 3 top travel publications according to the travel trade are: DOVE Viaggi, TTG, Touring Club.

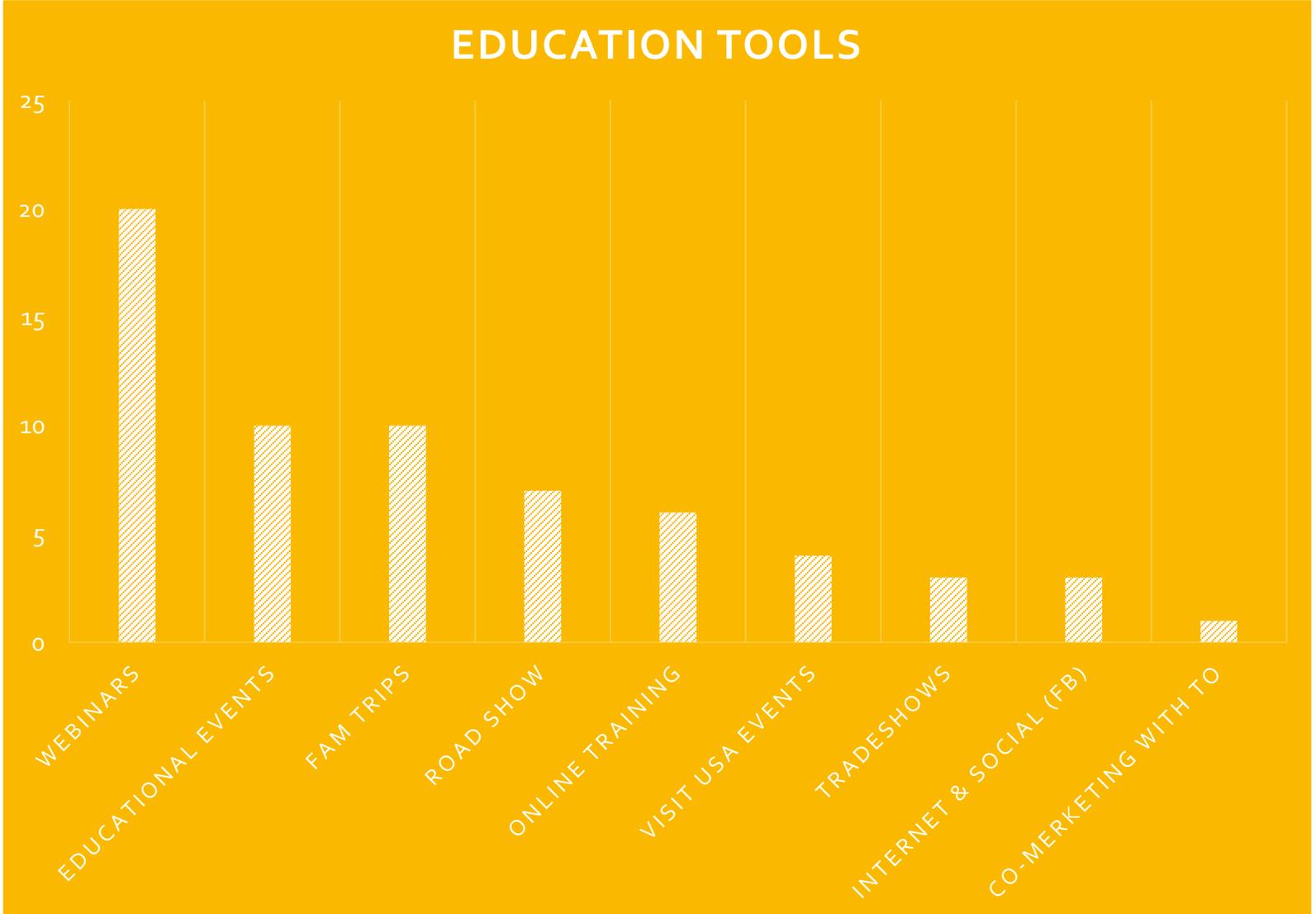
DOVE Viaggi – Lifestyle magazine, leader in the travel sector. Exclusive worldwide destinations, itineraries, restaurants, shopping, art and practical information strictly tested and guaranteed by travel experts. Monthly magazine, both paper and digital versions available, readership: 439.000, average annual circulation 60.775.

TTG – One of the leading travel trade magazines in Italy – 70% of their readers are travel agents, interested in discovering products and industry news. The online version is the most read travel news magazine in Italy and reached up to 80K online readers. The readership is approx. 50.000 and paper magazines reacheds out to 9.000 subscribed agents.

Touring Club – Historical magazine born out of a tourism association in 1894. It has 11 annual editions and over 350.000 subscribed families, reaching a readership of 1.800.000.

Question 3:

What is the best way of educating the travel trade on what the destination has to offer?



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The survey showed that one of the most popular ways agents like to receive education on a destination is through webinars.

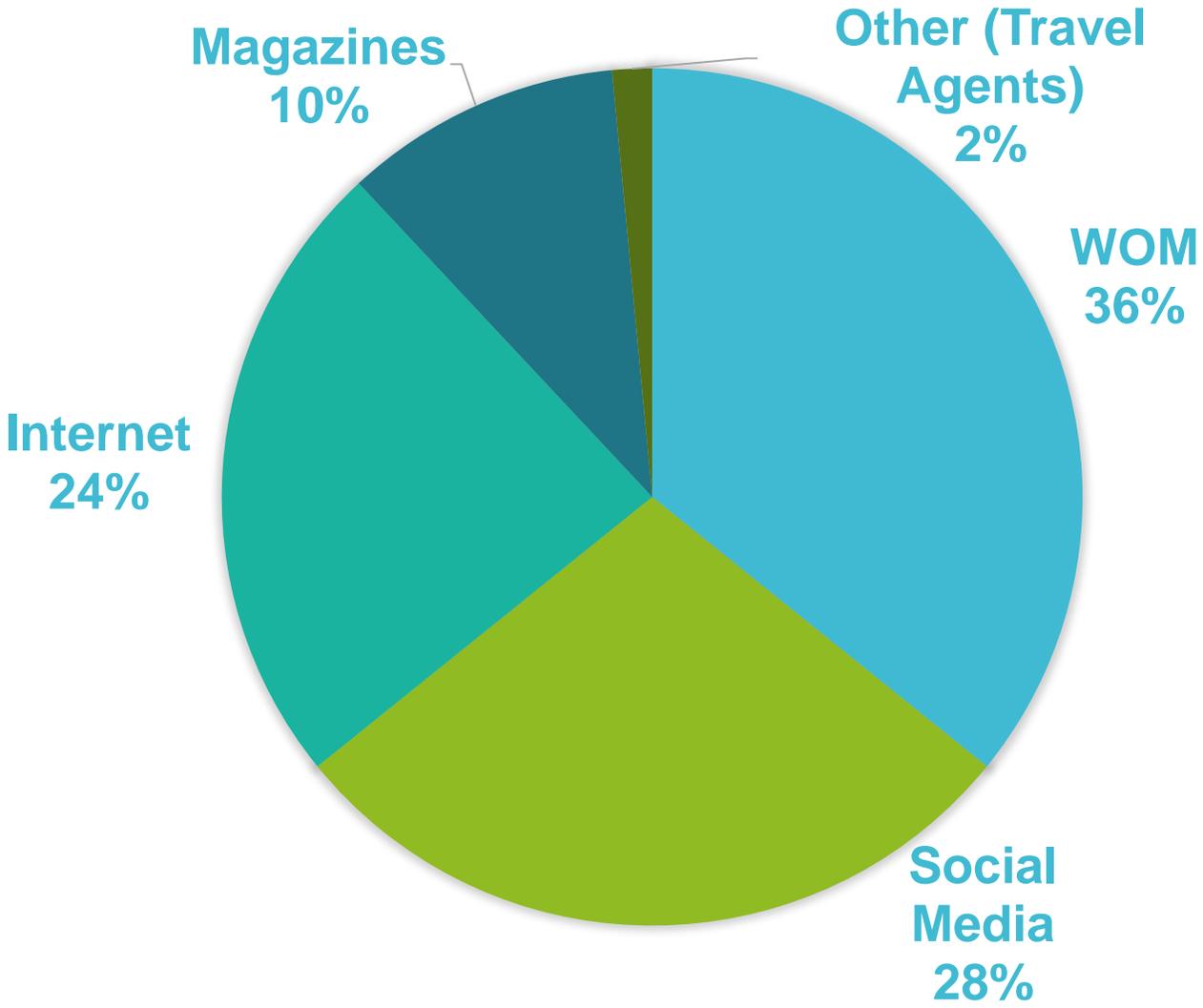
The second most popular option are educational events. These can be in collaboration with a Tour Operator, that would gather between 30 to 70 agents in the surrounding area and would co-host an educational event / training with the destination. AXTM has received costs / proposals for these kind of events.

Third choice is fam trips. Agents and product managers want to test products in order to be confident in selling them and be more proactive in pushing a destination.

Conclusions: AXTM has done the first FKKW webinar dedicated to the Italian market on May the 5th 2017, reaching out to 160 attending agents. We are also active on tradeshow and Visit USA events. A 2018 FAM trip has been proposed and we could look into co-hosting an educational event in 2018.

Question 4:

Which are the most influential channels on the final destination choice?



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The survey highlighted how the internet and social media have become the main source of inspiration for leisure consumers and how powerful these tools are.

From travel blogs to travel inspiration pages and travel magazines social media accounts, consumers are constantly exposed to images of dream destinations while in search for their next holiday.

Another extremely important channel in the Italian market is 'Word of Mouth'.

Question 5:

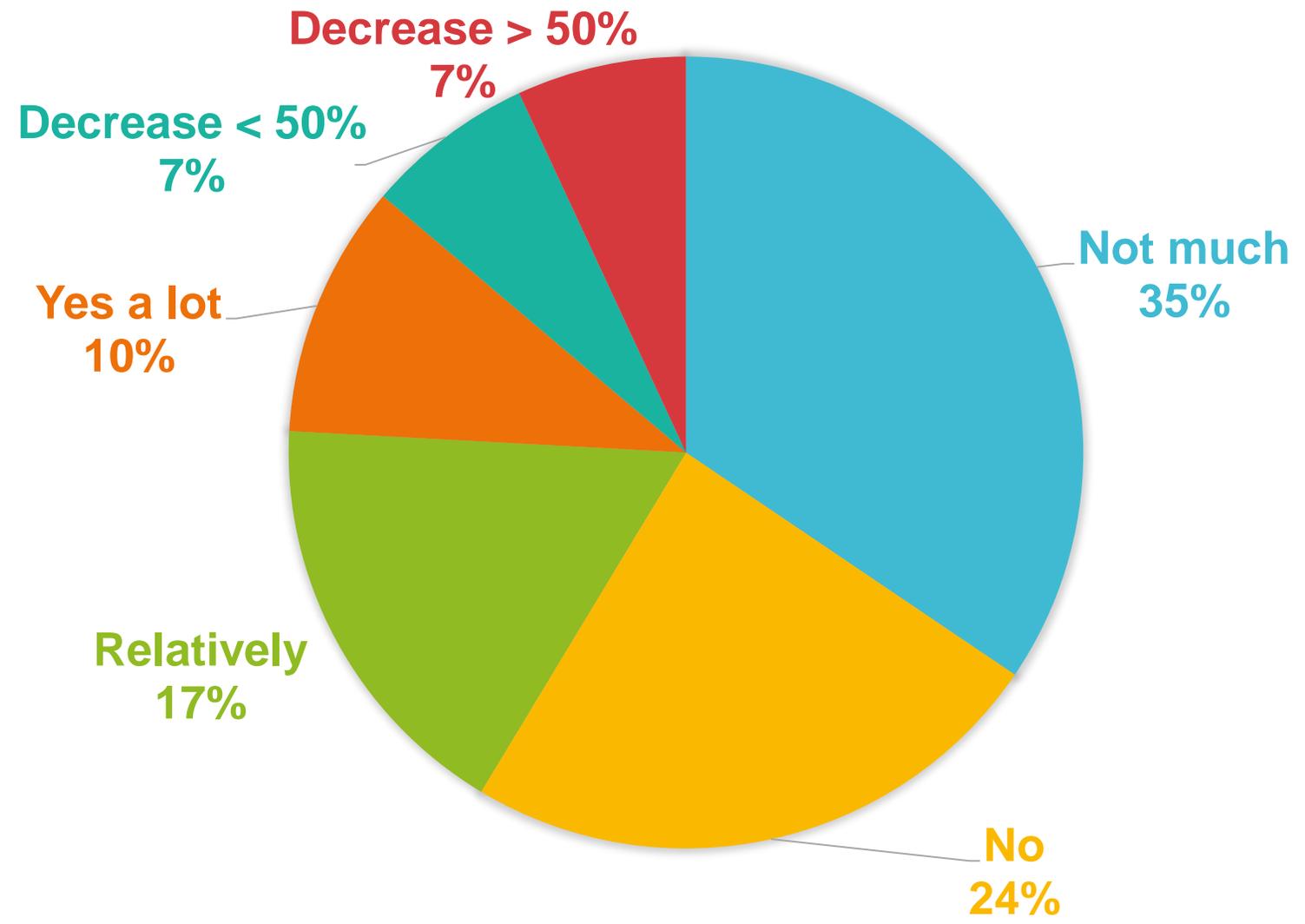
How far in advance does the Italian consumer book travel?

Holiday Type	Time
Long Haul	2 to 4 months ahead
Short Haul	1 month / last minute
Honeymoons	6 to 9 months ahead



Question 6:

Is the current exchange rate affecting travel to the United States?



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The survey shows that almost 60% of Travel agents & Tour Operators have not seen their bookings drastically decrease due to current USD – EUR exchange rate.

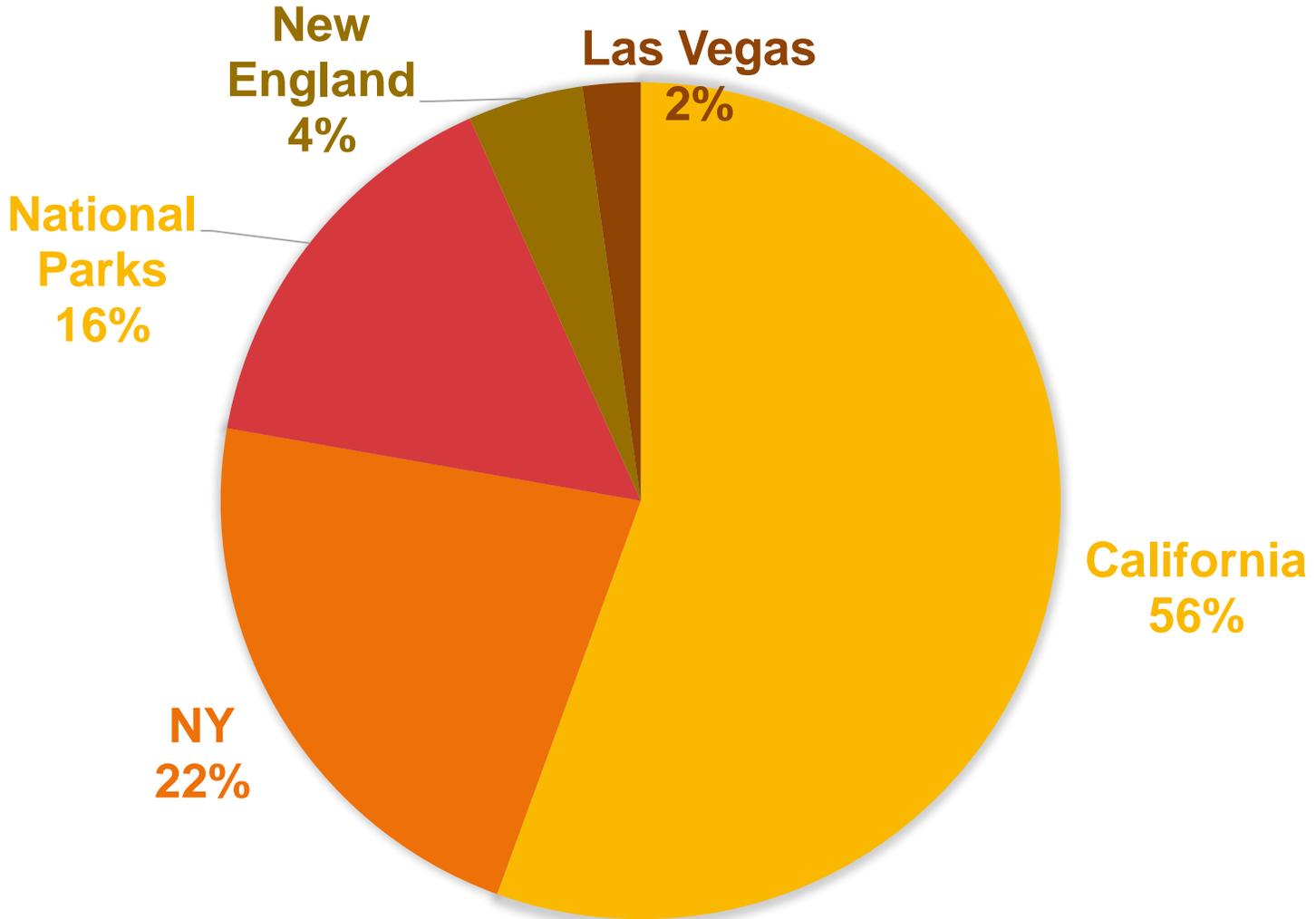
Only 10% has declared to have witnessed a strong negative effect due to the exchange rate, while 17% has responded “relatively”.

7% has observed a decrease in bookings of over 50%, while another 7% has observed a decrease in bookings of less than 50%.

Overall the exchange rate has had a light effect on bookings, but the top US destinations are still extremely popular choices and the effect of the exchange rate is not strong enough to prevent consumers from booking their holiday in the US.

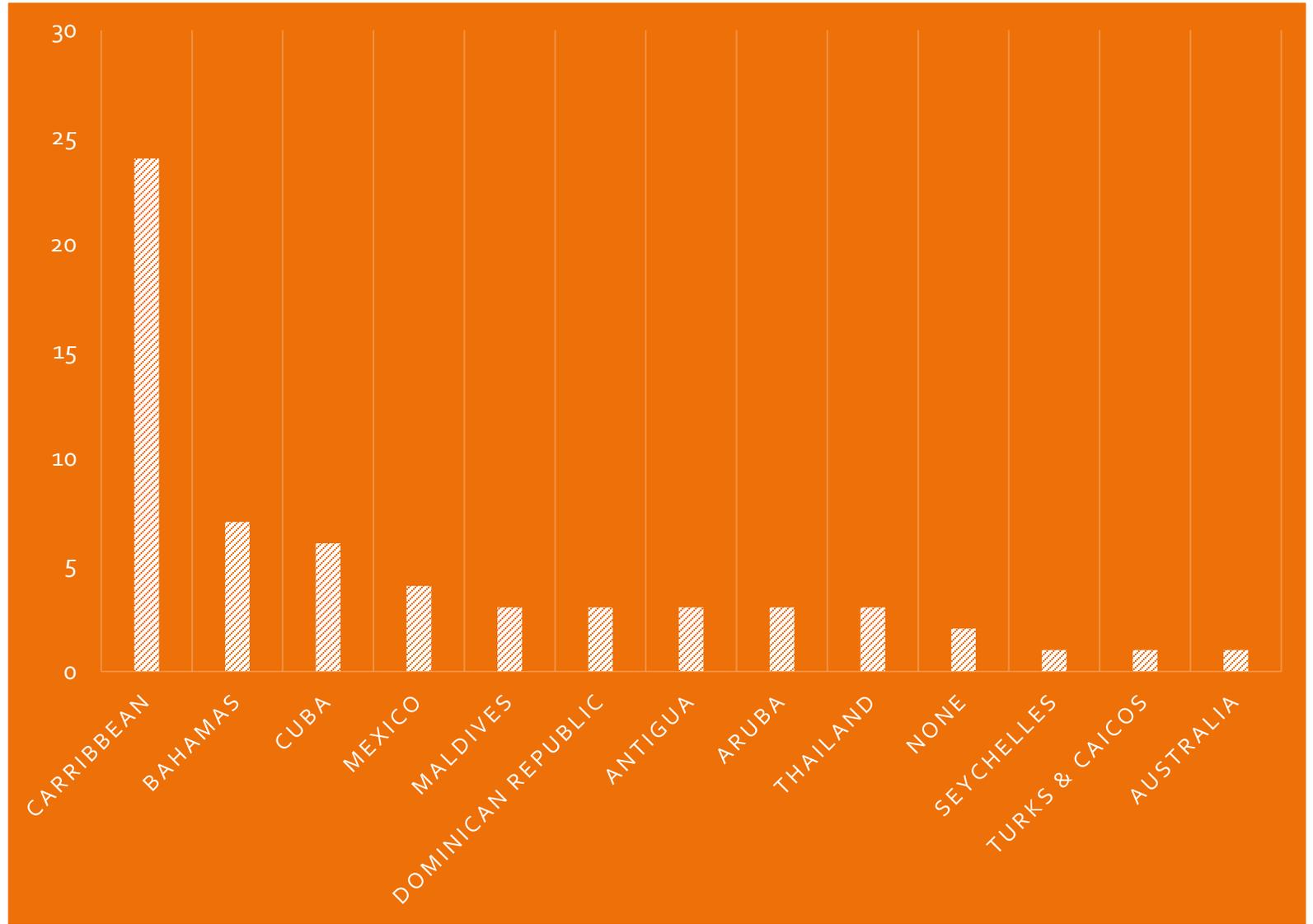
Question 7:

What other destinations in the USA does Florida compete with, within the US?



Question 8:

If not in the USA, what other tropical regions do people consider?



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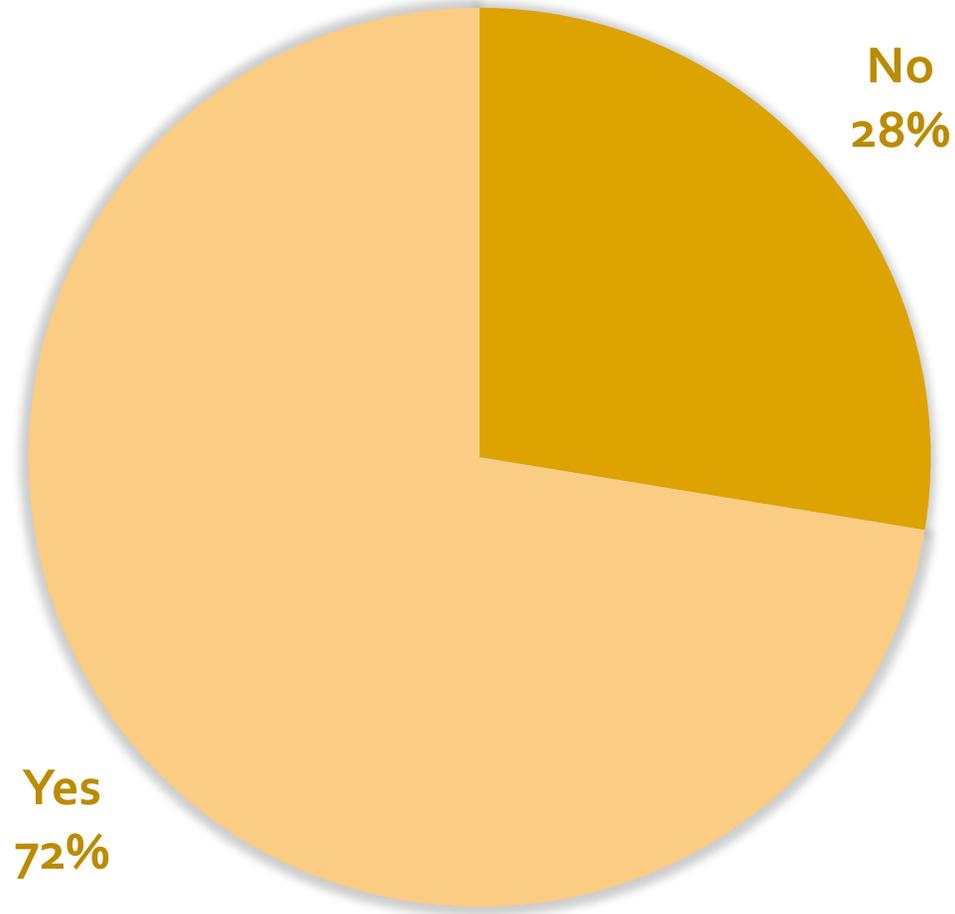
East Coast VS. West Coast

Over 55% of those surveyed selected California to be the top competing US destination with Florida. Followed by New York City, National Park destinations, New England and finally Las Vegas.

Concerning top competing destinations outside of the US, Caribbean islands are at the top rankings. The presence of Maldives highlights the fact that the Keys are not only considered a Miami extension, but as well a honeymoon unique destination.

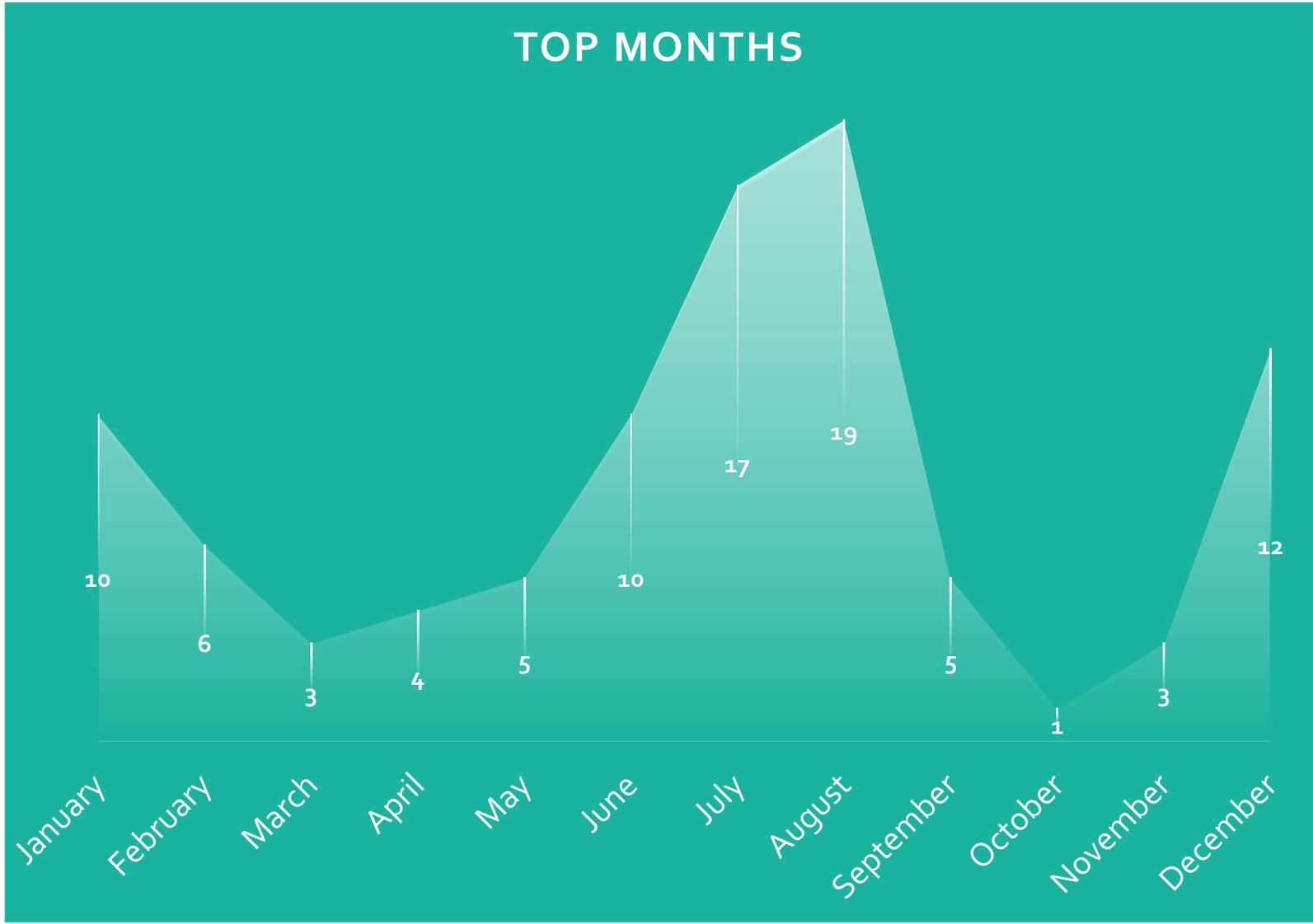
Question 9:

Have you seen an increase in cruise bookings out of South Florida? If so, would you recommend a pre/post trip to the Florida Keys and Key West?



Question 10:

What are the three most popular months for travel to the Florida Keys and Key West?



Question 9 & 10:

Cruise business & recommendat ions

Peak Travel months

Most of the interviewed (70%) has seen an increase in cruise bookings departing from Florida and would definitely recommend a pre or post cruise extension to the Keys. The remaining 30% has not observed any increase in cruise bookings, but they say they would still recommend the Florida Keys. The only issue highlighted is that, in many cases, there are not enough days in the itinerary to include more than a one night stay in the Florida Keys,.

Peak booking months for Italian market are summer months: July – August and winter holidays: December – January.

Majority of Italian companies are closed during August and have 1 or 2 weeks at Christmas, so this strongly dictates the tendency of travelling in those months.

Conclusions

AXTM has found the survey results very helpful when planning strategies and promotional efforts for the Italian market for 2018/19.

It is clear the Italian market continue to book the Florida Keys as a sun and sea destination combined with honeymoons however the survey has shown opportunities to enhance pre and post cruise options shown to Tour Operators and identified the need to promote attractions and activities across all districts and not just Key West to ensure a clear understanding of all that is offered.

It has highlighted that our webinar training approach is one of the best ways of educating the trade and opened up ideas to co-host training events with key Tour Operators.

By identifying which magazines are considered the most influential, the peak travel months and the booking periods AXTM can positively implement this knowledge when considering joint marketing campaigns, organising FAM trips and attending key shows.

The Italian market continues to be key for European visitation to the Florida Keys and these trends will ensure strategies moving forward are tailored to the market as necessary.