STUDY HALL

Experience Kissimmee national traveler survey

Awareness, attitudes, opinions and profile data from a quantitative study of Kissimmee visitors & prospects

Study Hall Research

January 2015 *v4 FINAL*

Study overview

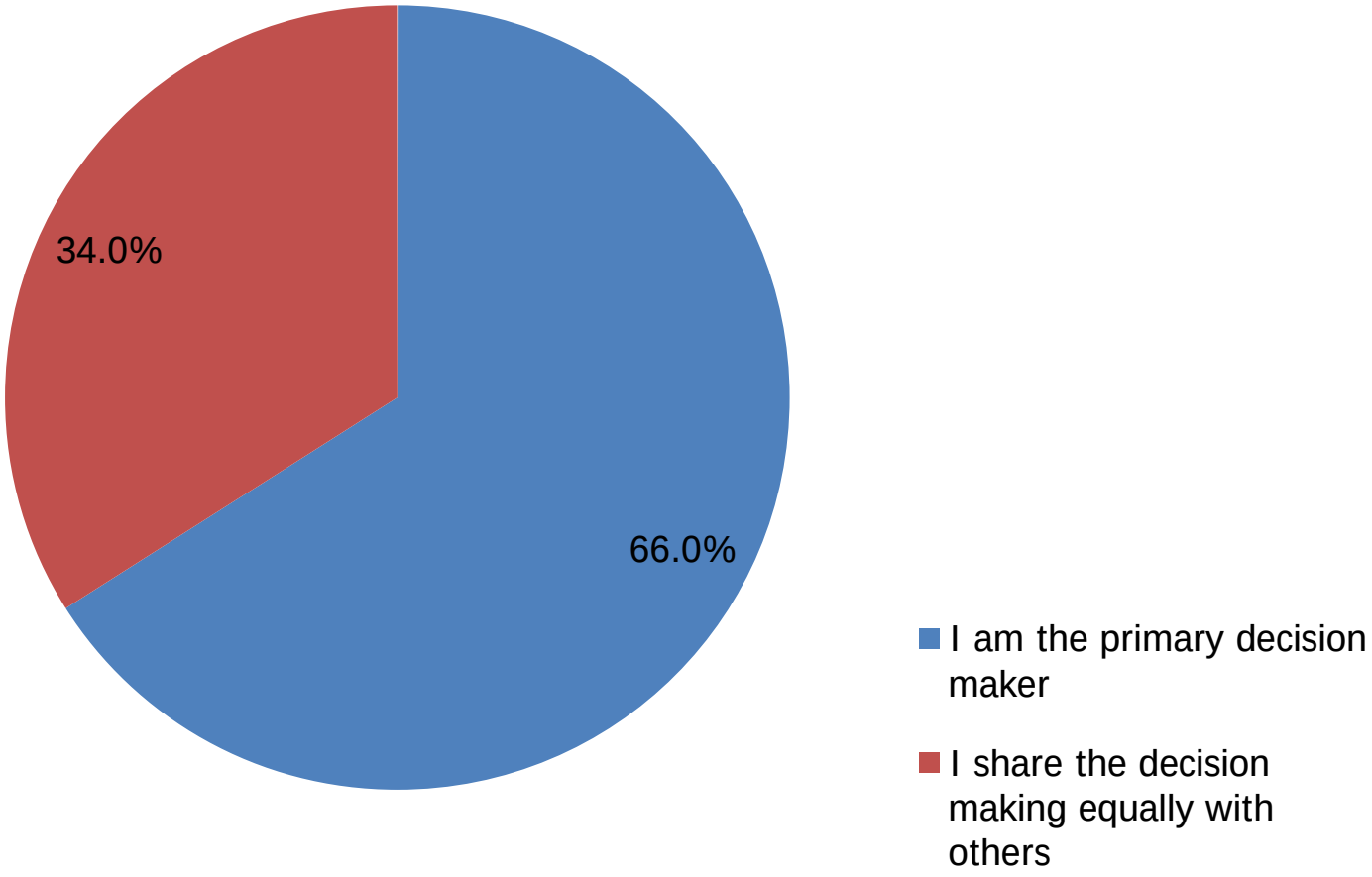
- Study Intent: Determine visitation behaviors and perceptions regarding Kissimmee.
- Methodology: Online QuickStudy® survey conducted December 2014 to January 2015.
- All respondents had traveled to the Orlando metropolitan area within the past two years and stayed overnight.
- Sample is from 1600 respondents across 8 selected metropolitan areas (approximately 200 per area).
  - Jacksonville data collection proved slow, so sample was 're-assigned' to other Florida markets.
  - Sample precision with a 95% confidence interval is +/- 2.45% error rate across the sample.
  - Sample precision for individual areas is approx. +/- 7%.

Market	Count
Atlanta	200
Boston	202
Chicago	200
Jacksonville	154
Miami/ Ft. Lauderdale/ WPB	219
New York City	201
Philadelphia	200
Tampa/St Pete	224
Total	1600

Respondent Demographics

Decision maker type

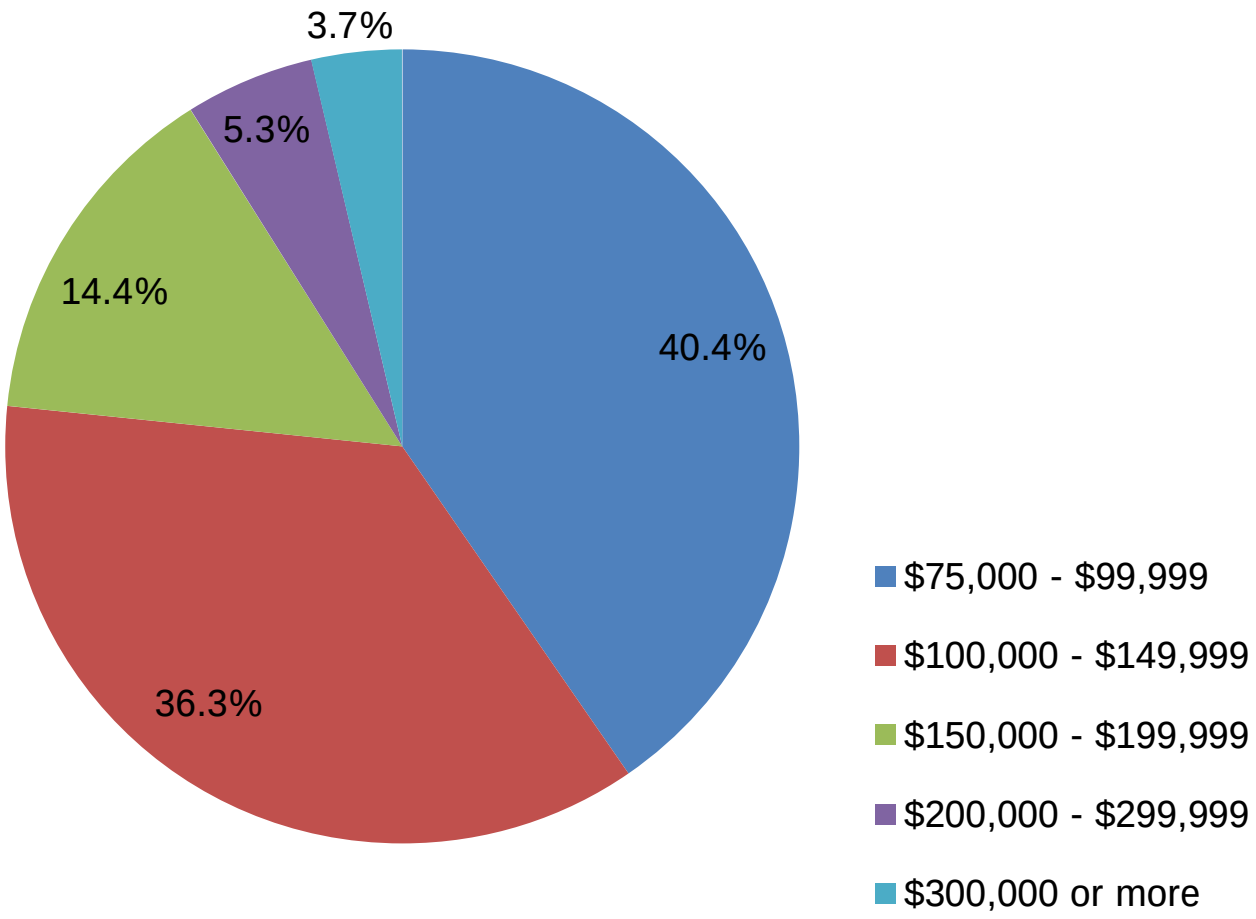
How would you describe your role in deciding upon your travel plans?



The majority of decision makers were the primary decision makers; the rest shared travel plan decision making. Non-decision makers were excluded from the survey.

Income

Which of the following best describes your approximate annual household income?



Three-fourths of respondents had incomes between $75K and $150K, rather evenly split between $75-99k and $100-150k. Respondents with incomes below $75K were excluded from the survey.

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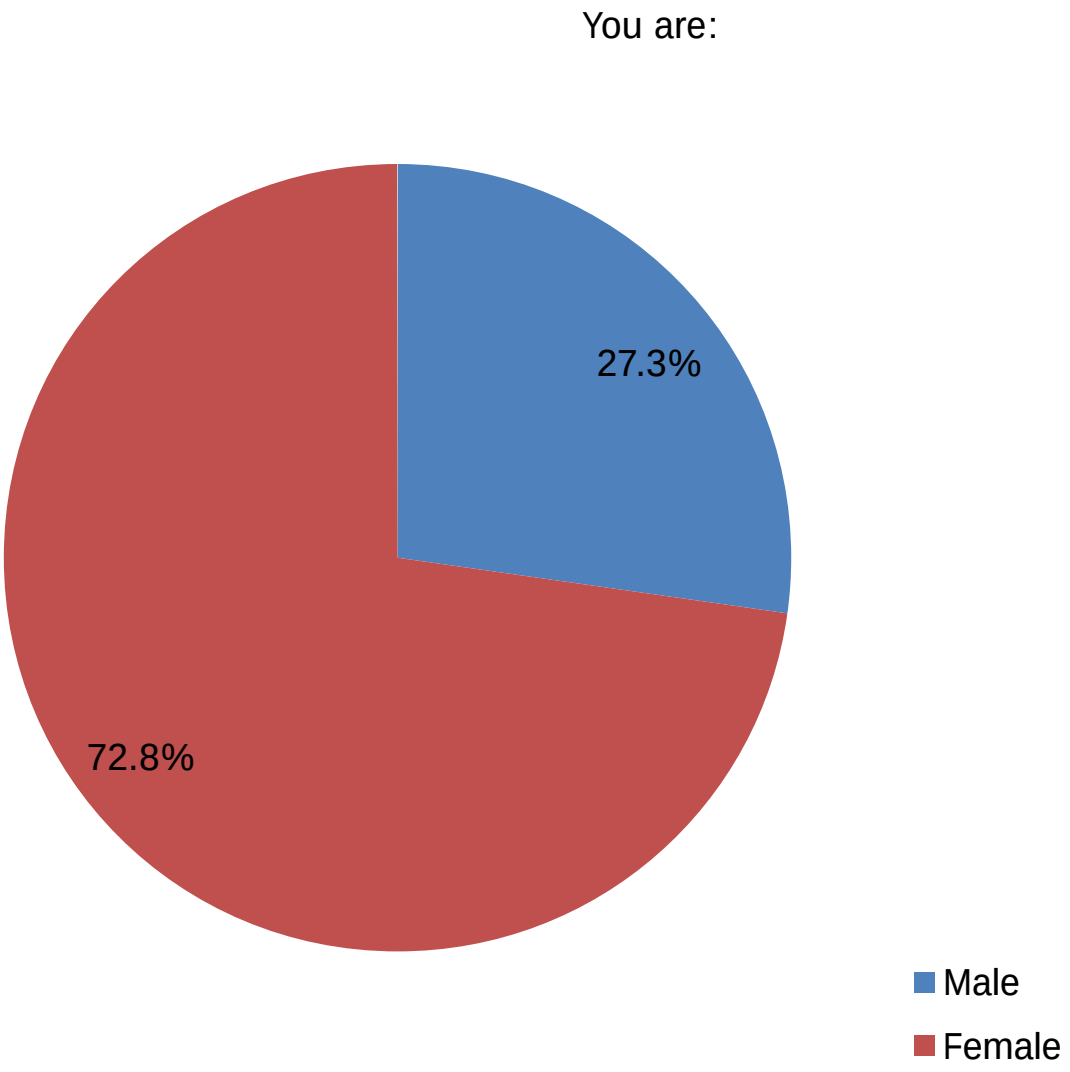
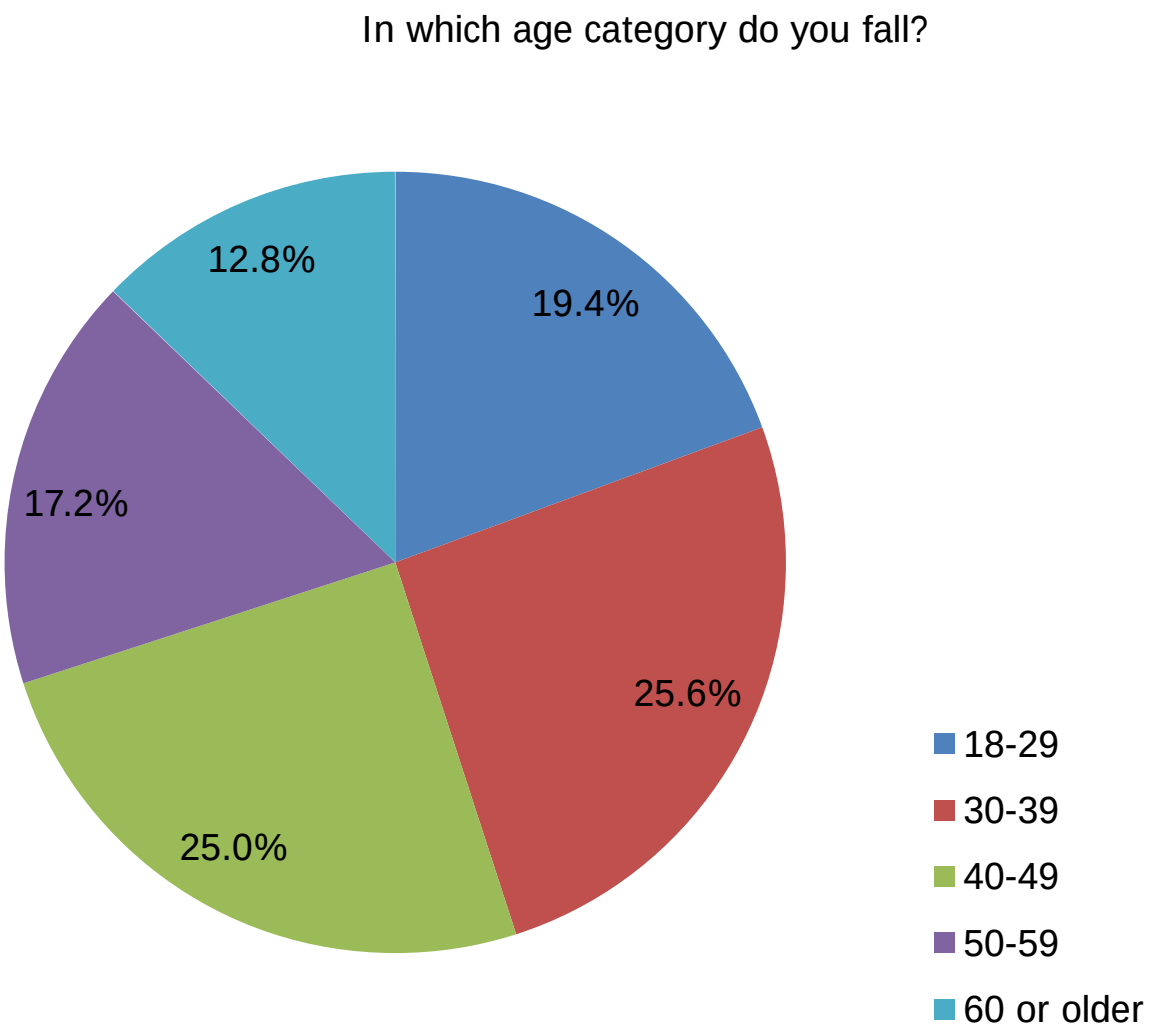
Gender



The majority of respondents were female, which is typical of online and general surveys, along with surveys dealing with travel decisions.

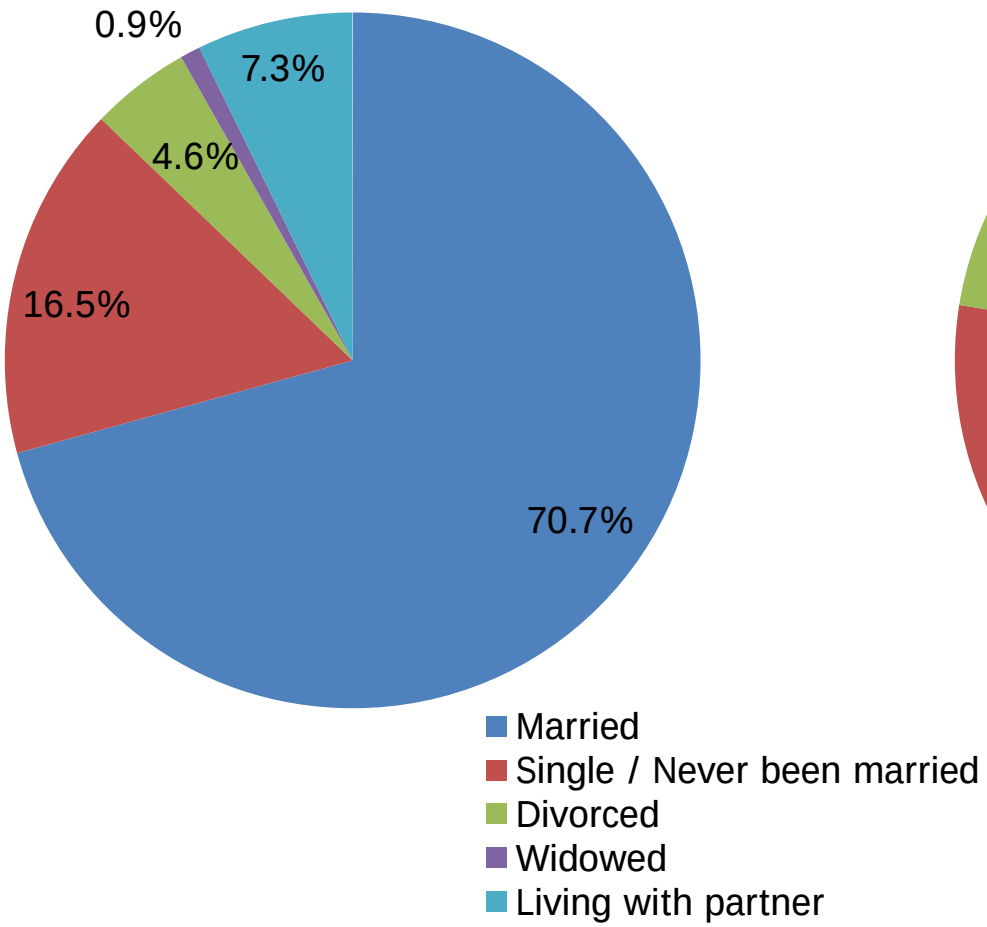
Age



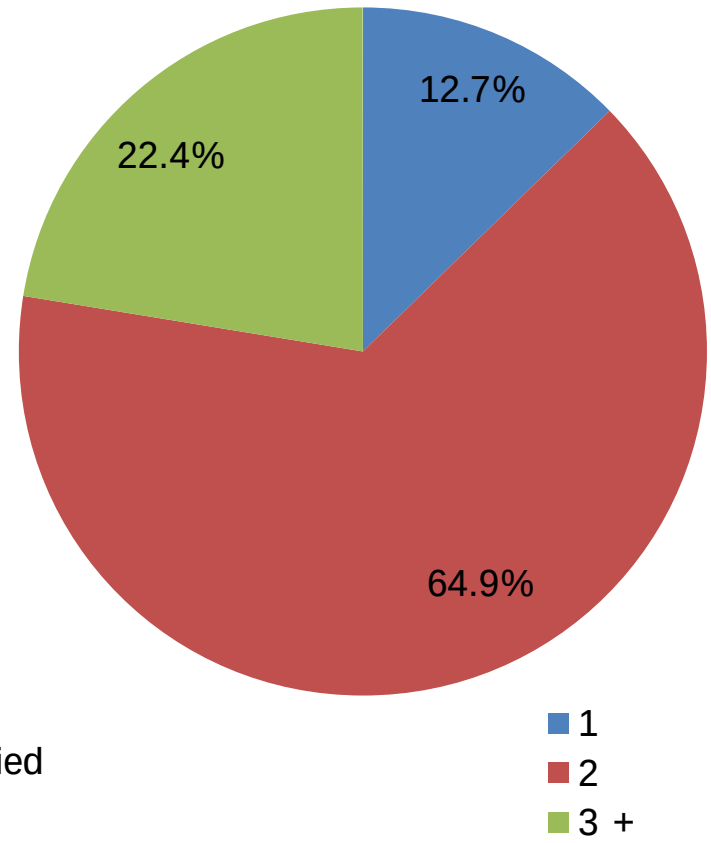
Respondents were somewhat equally distributed among age groups, with the smallest age group represented by 60 or older.

Household composition

Which of the following best describes your current marital or relationship status?



Including yourself, how many adults over the age of 18 live in your household?



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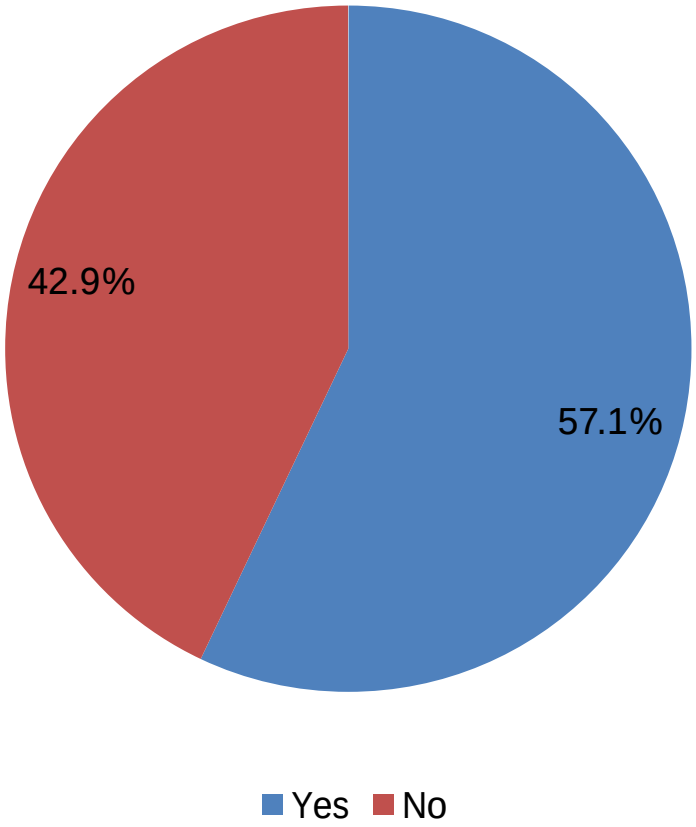
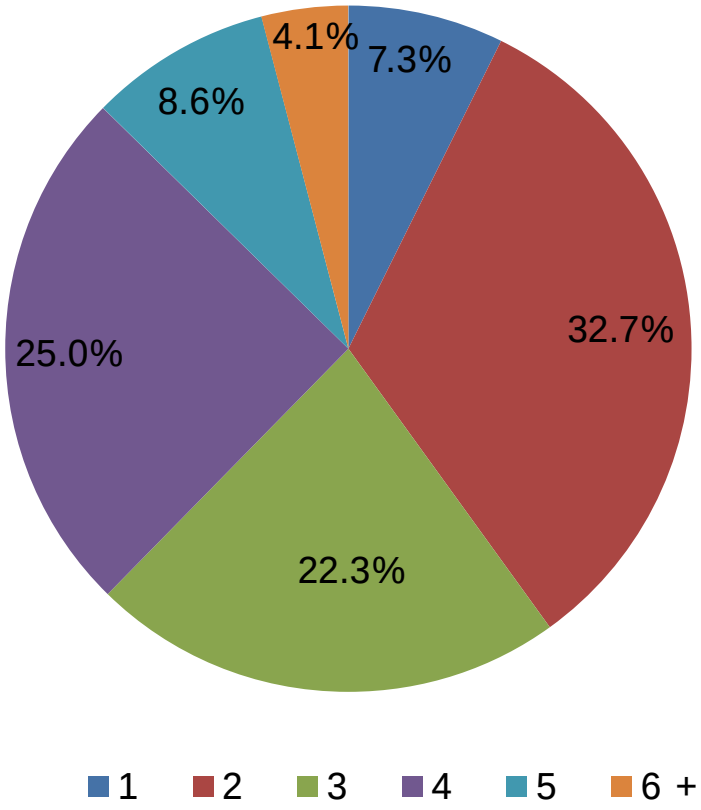
The majority of respondents are married and living in two-adult households.

Household composition (2)

Do you have children under the age of 18 residing in your household?



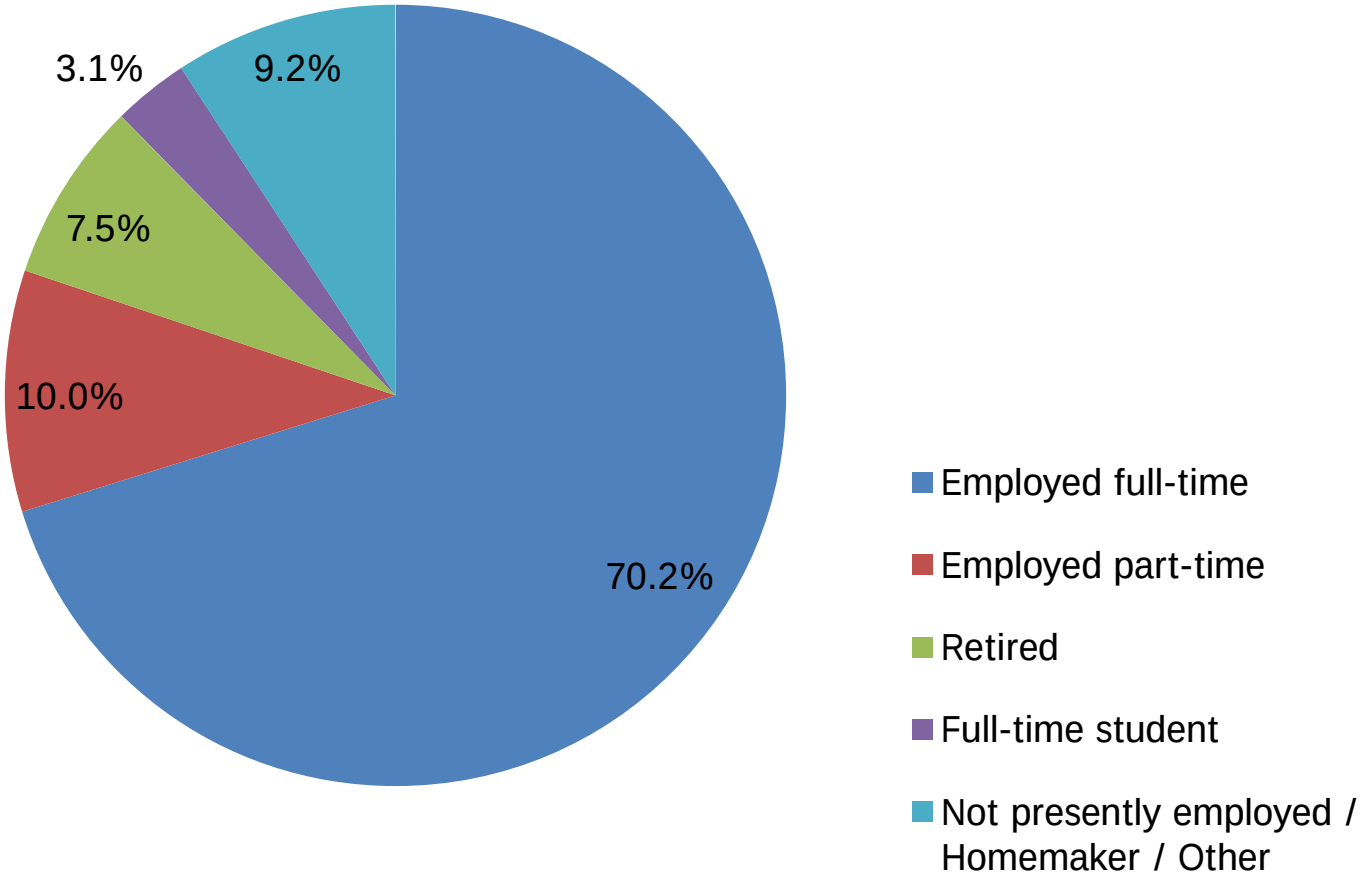
Including yourself, how many total individuals reside full-time in your household?



Respondents tended to have children; number of kids per HH was somewhat evenly spread.

Employment

What is your current employment status?



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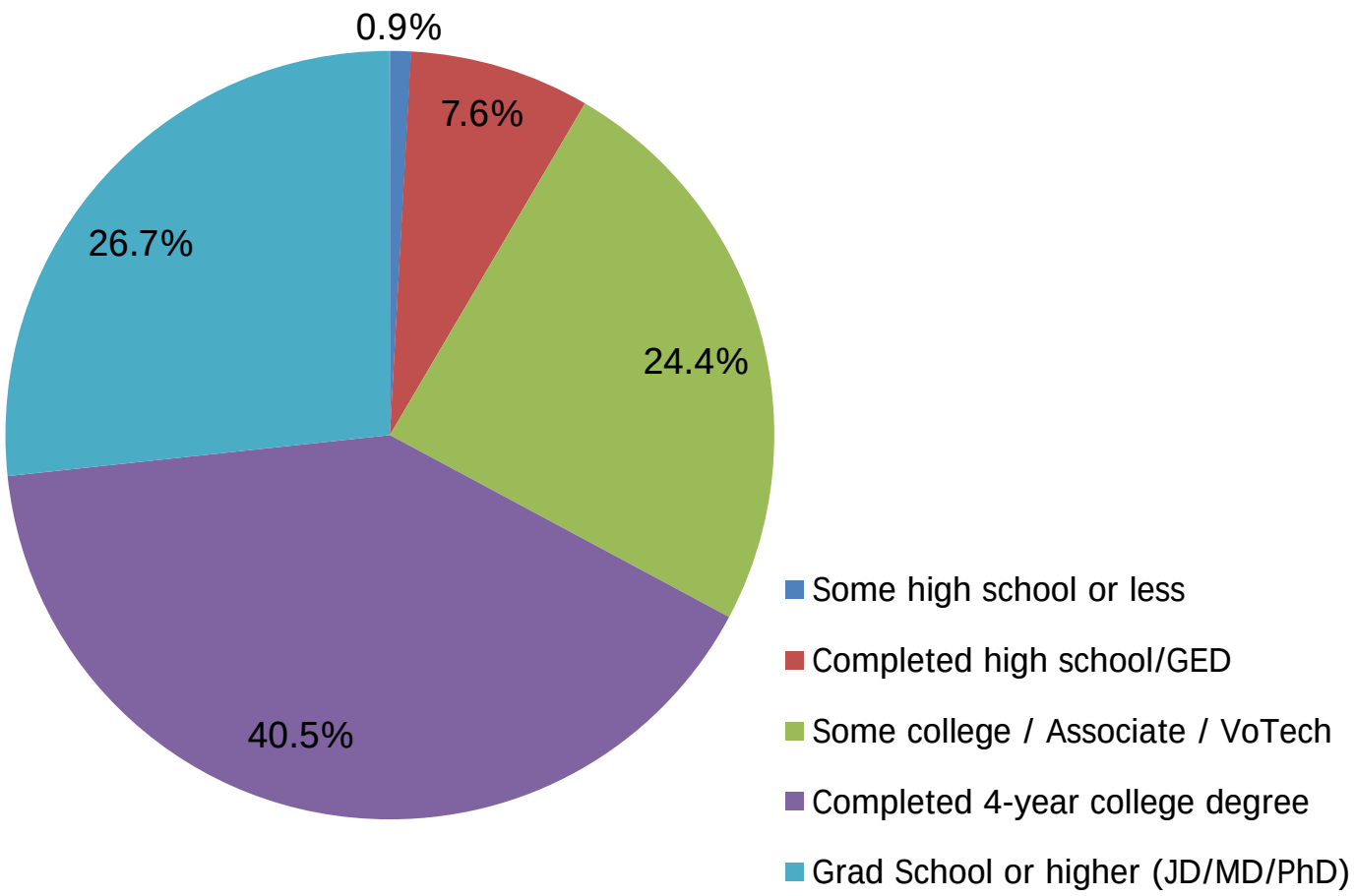
The majority of respondents were employed full time.

Education

What is the highest level of education you have completed?



The majority of respondents were well educated, with two-thirds holding a college degree or higher.

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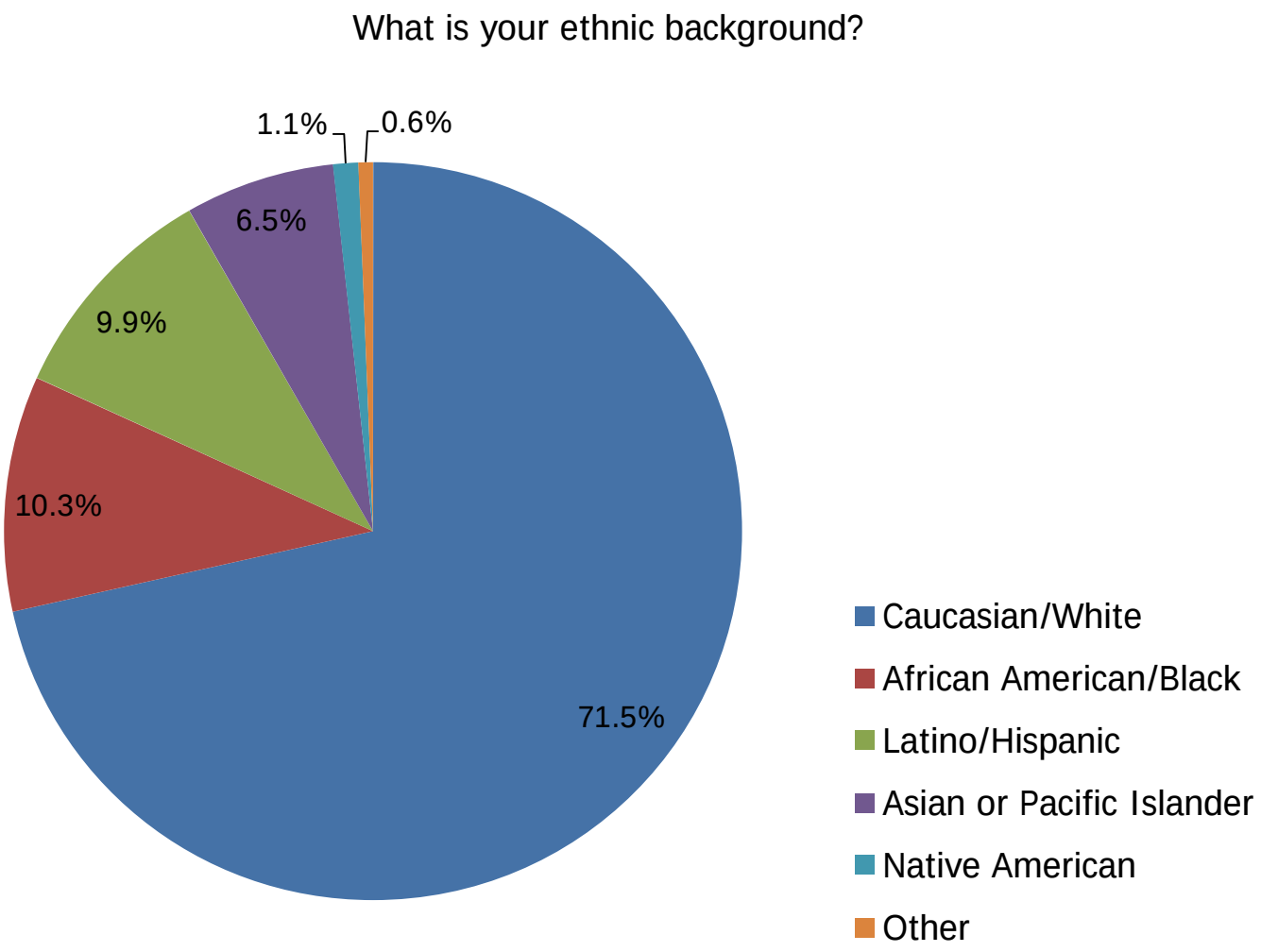
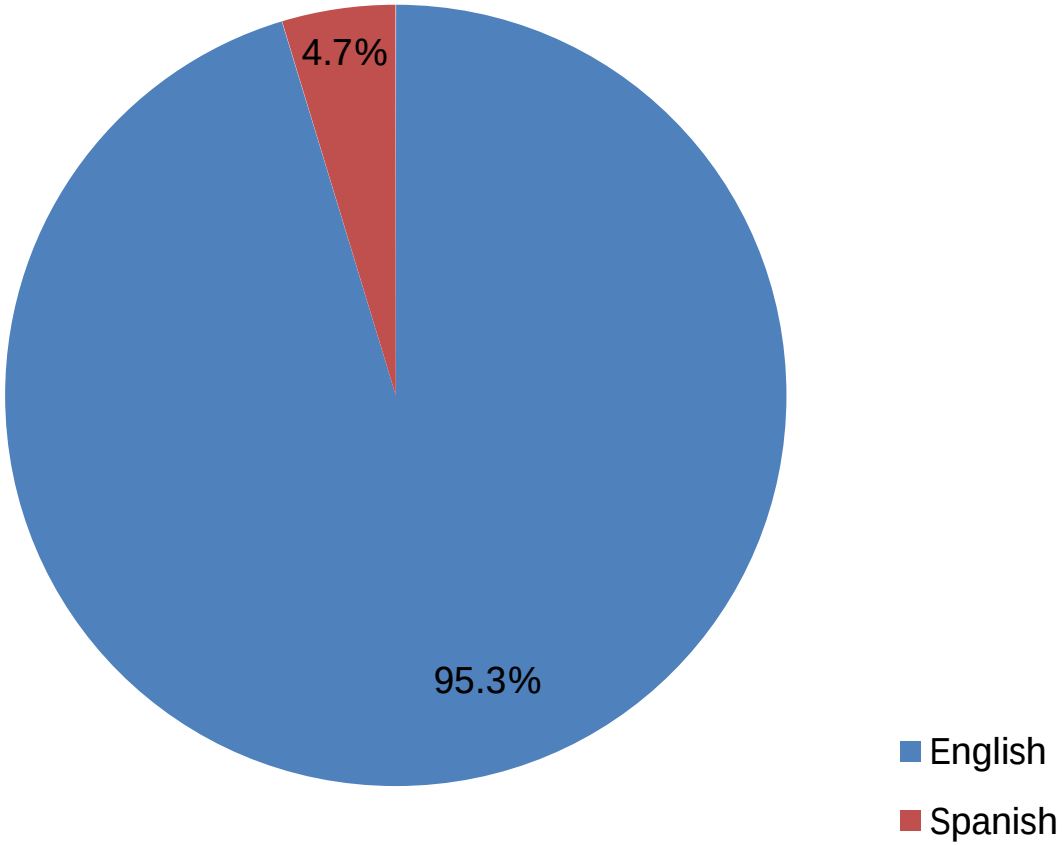
Ethnicity



The majority of respondents were Caucasian/White.

Language preference (Hispanic/Latino respondents only)

When receiving or searching for information regarding travel destinations, do you prefer to receive information in English or Spanish language?



Hispanic respondents overwhelmingly prefer travel destination information in English.

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Implications - demographics

- Stronger than expected incidence of higher-income visitors.
  - Implication: Opportunity to develop value, luxury or other packages that are targeted toward different income (and thus potential vacation spending) levels.

- Kissimmee travel decision makers tend to be educated married females with children who are also employed full time.
  - Implication: This demographic makes family-based travel decisions based on economic value and convenience

- One-third of respondents in households of 4-6 individuals.
  - Implication: Opportunity for specific marcomm focused on larger parties or bigger families; meshes well with perceptions that private home stays would be more comfortable.

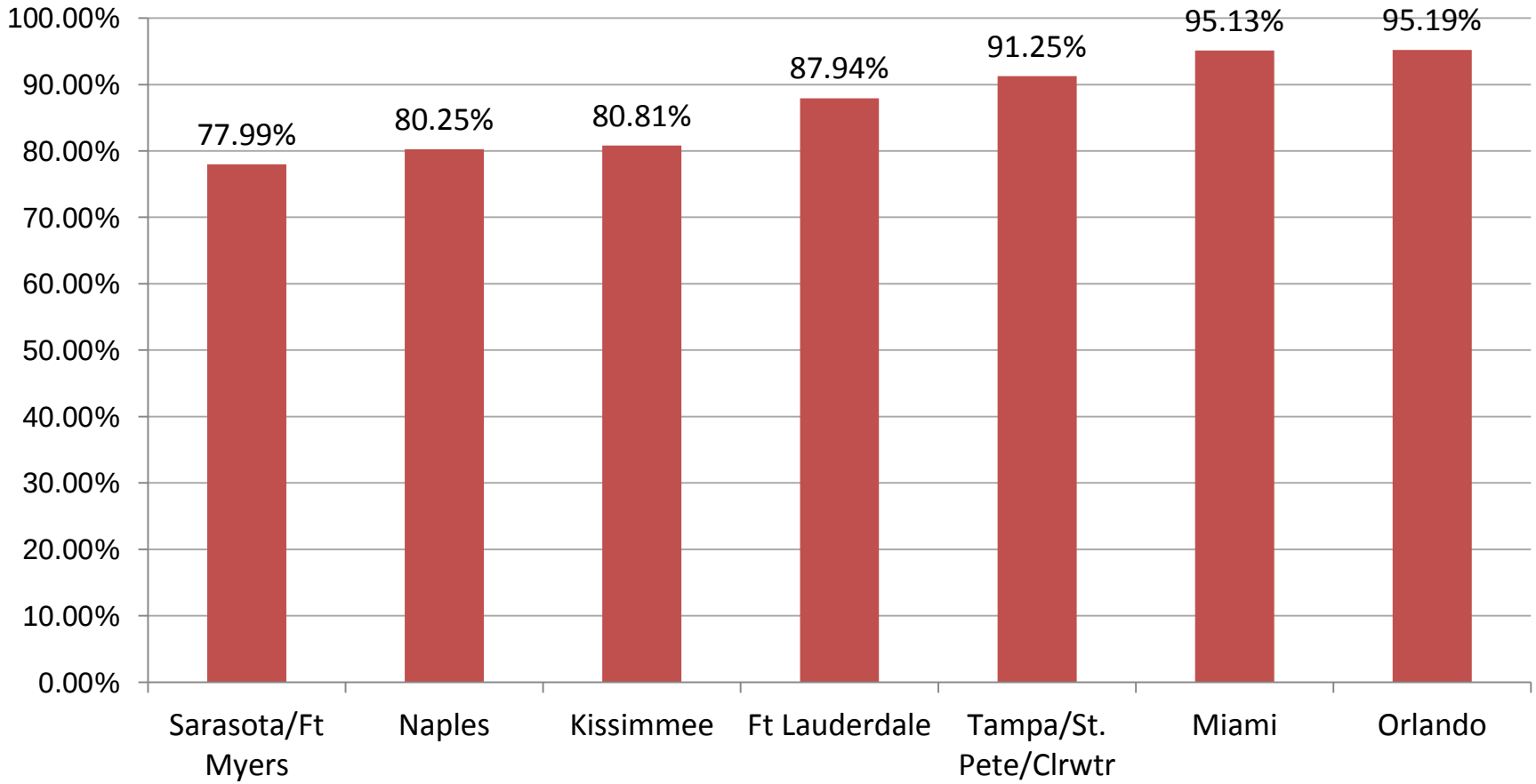
- Two-thirds of respondents highly-educated.
  - Implication: Opportunity for specific marcomm focused on intellectual/cultural aspects of a Kissimmee visit.

- Based on language preference, minimal need for Spanish-language materials.

Kissimmee Awareness

Florida travel destination awareness

Which of the following travel destinations are you aware of, or have you heard of?



(Percentages for each based on # of mentions vs. total possible response pool of 1600 per destination)

General awareness levels high for all destinations. Most respondents were aware of Orlando and Miami, but somewhat fewer were aware of Kissimmee, Naples, and Sarasota/Fort Myers.

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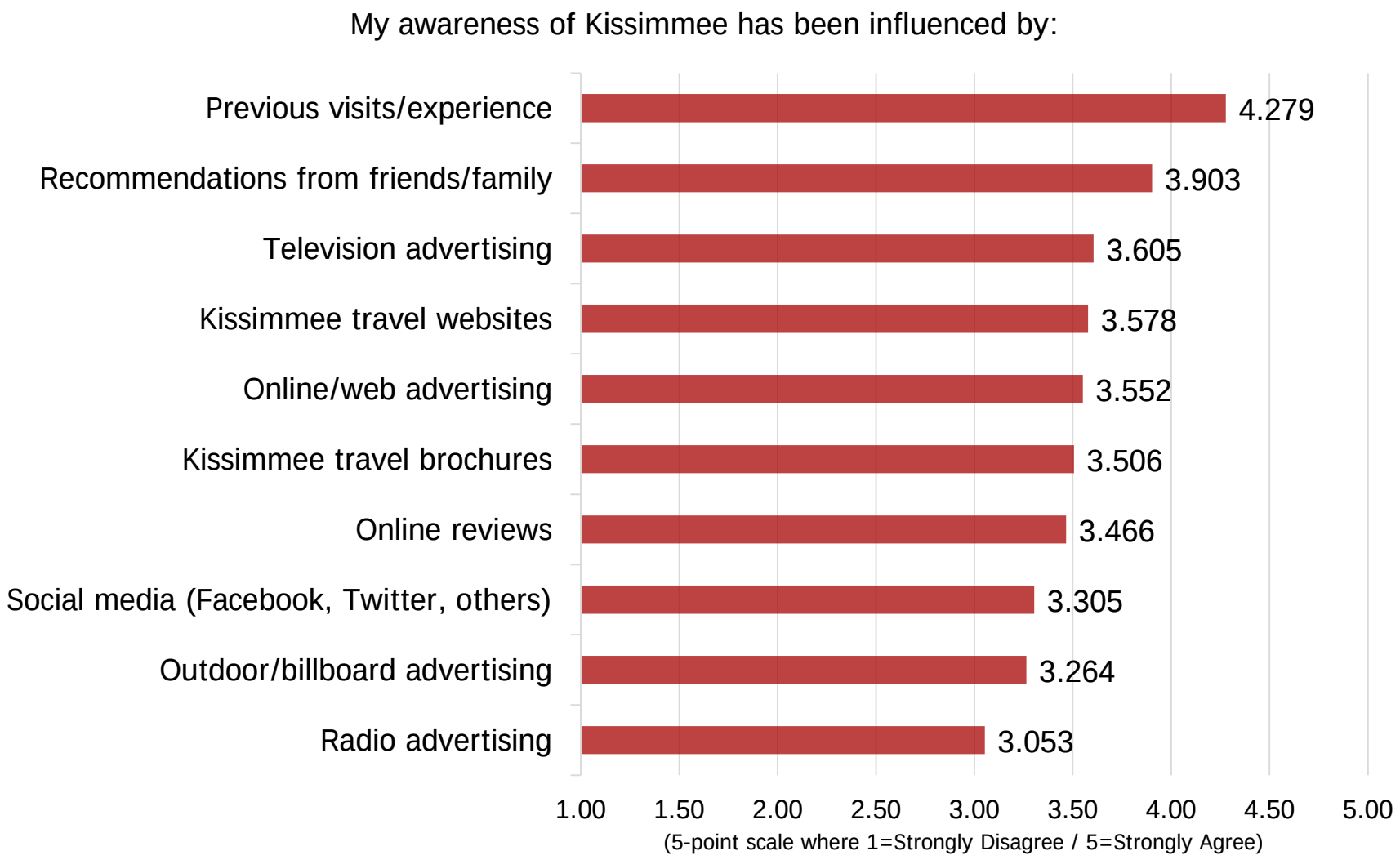
Sources of 'Kissimmee awareness"



Respondents aware of Kissimmee as a travel destination scored *previous visits* and *recommendations* as their highest source of influence. *Television* and *websites* were the strongest media influencers; *outdoor* and *radio* were the lowest.

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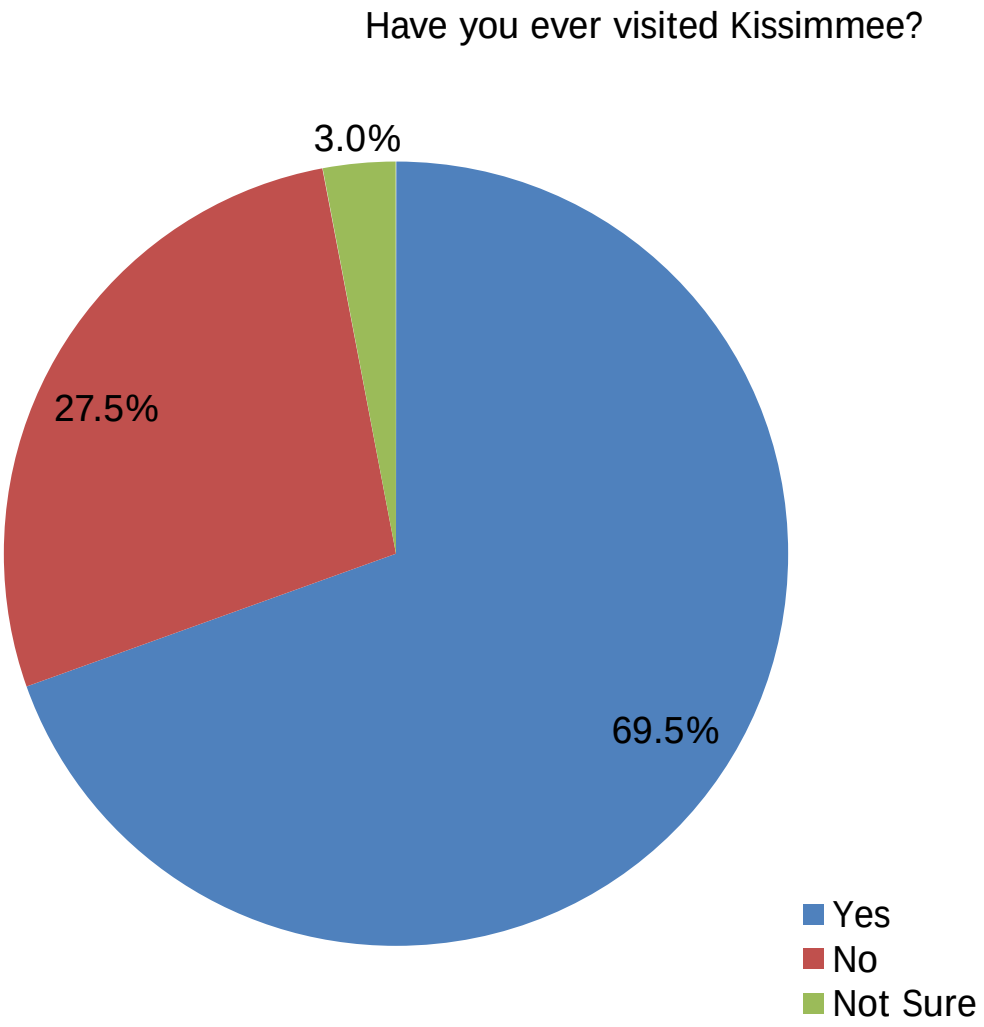
Implications – Kissimmee awareness

- While general awareness is high for Kissimmee…,
  - There is still room for growth to put the destination on par with Florida's larger destination markets: Orlando, Miami, Tampa/St. Pete/Clearwater, Ft. Lauderdale.
  - Ft. Lauderdale the closest 'goal market' for Kissimmee to 'knock off!'

- TV a strong awareness driver (after personal experience and friends & family). But web-based sources and print brochures also strong.)
  - Opportunity for Experience Kissimmee to optimize marcomm across these key mediums.

Kissimmee Visitation Behaviors & Satisfaction

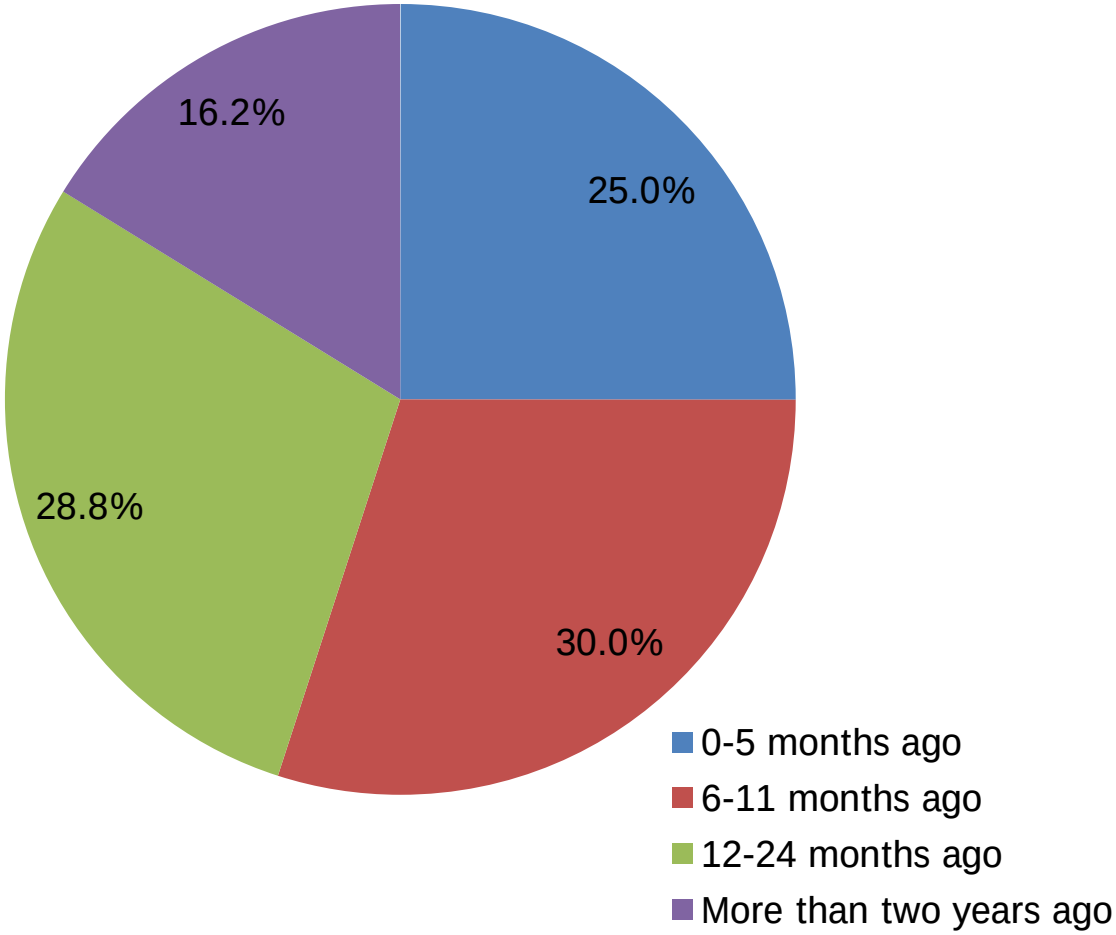
Kissimmee visitation - history



The majority of respondents had visited Kissimmee. Those who had visited (n=1112) continued with this section of the survey.

Kissimmee visitation - recency

Thinking about your most recent visit to Kissimmee, about how long ago was that visit?



Most visitors had traveled to Kissimmee within the past 11 months.
(NOTE: This is, essentially, the past year.)

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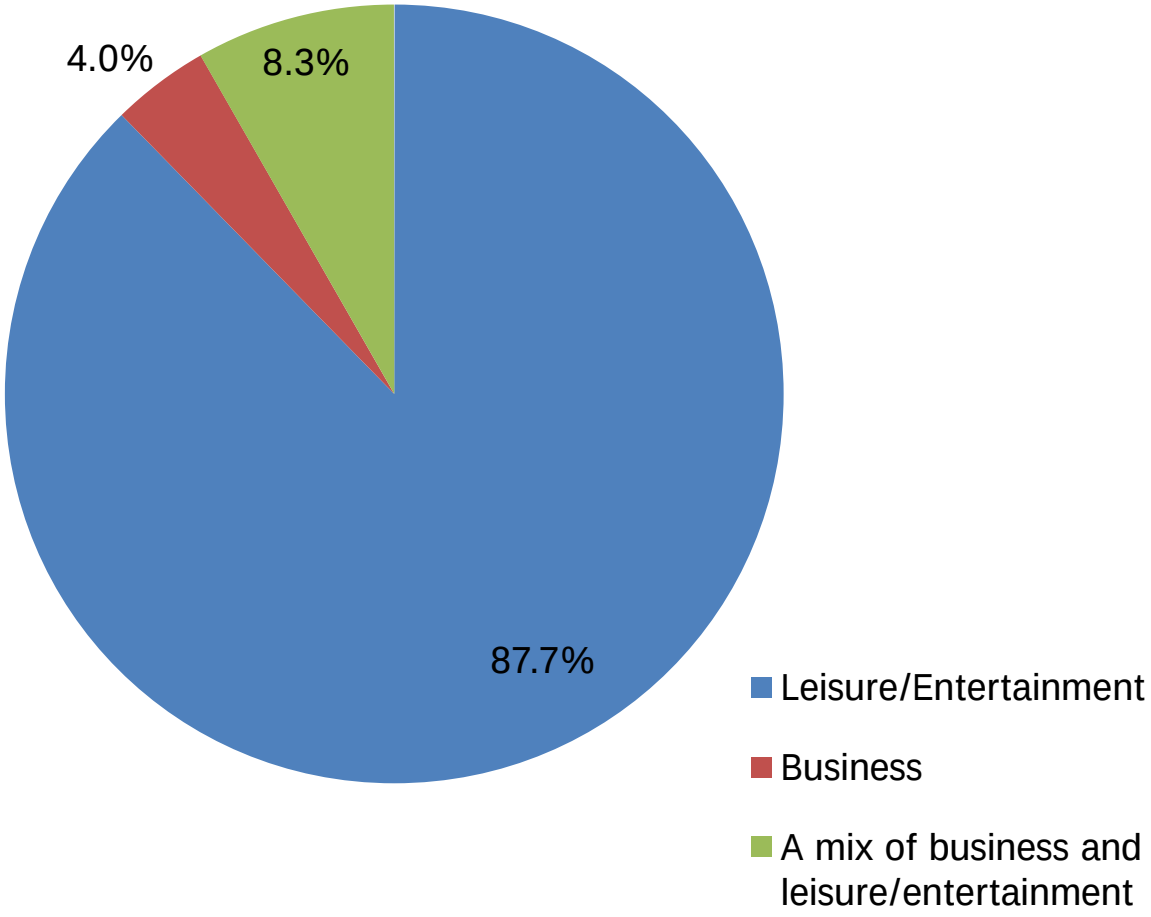
Kissimmee visitation – purpose of travel

Thinking about your most recent visit to Kissimmee, what was the purpose of that visit?



The significant majority of visitors traveled to Kissimmee for leisure/entertainment.

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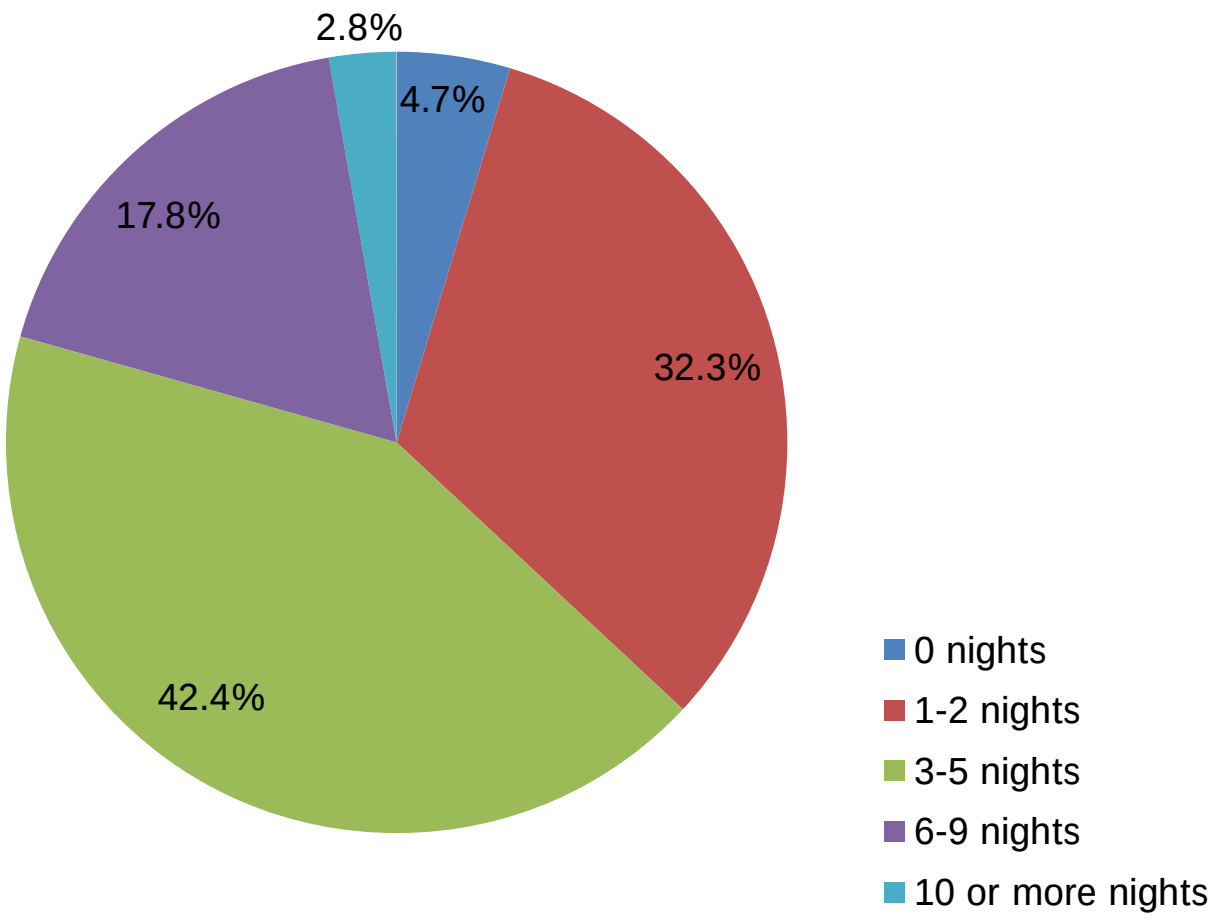
Kissimmee visitation – length of stay

On your most recent visit to Kissimmee, how many nights did you stay over?



Visit durations were divided across shorter (1-2 nights) and longer stays (3+), with the majority of respondents staying 3 or more nights. But one-fifth (20.6%) stayed 6+ nights.

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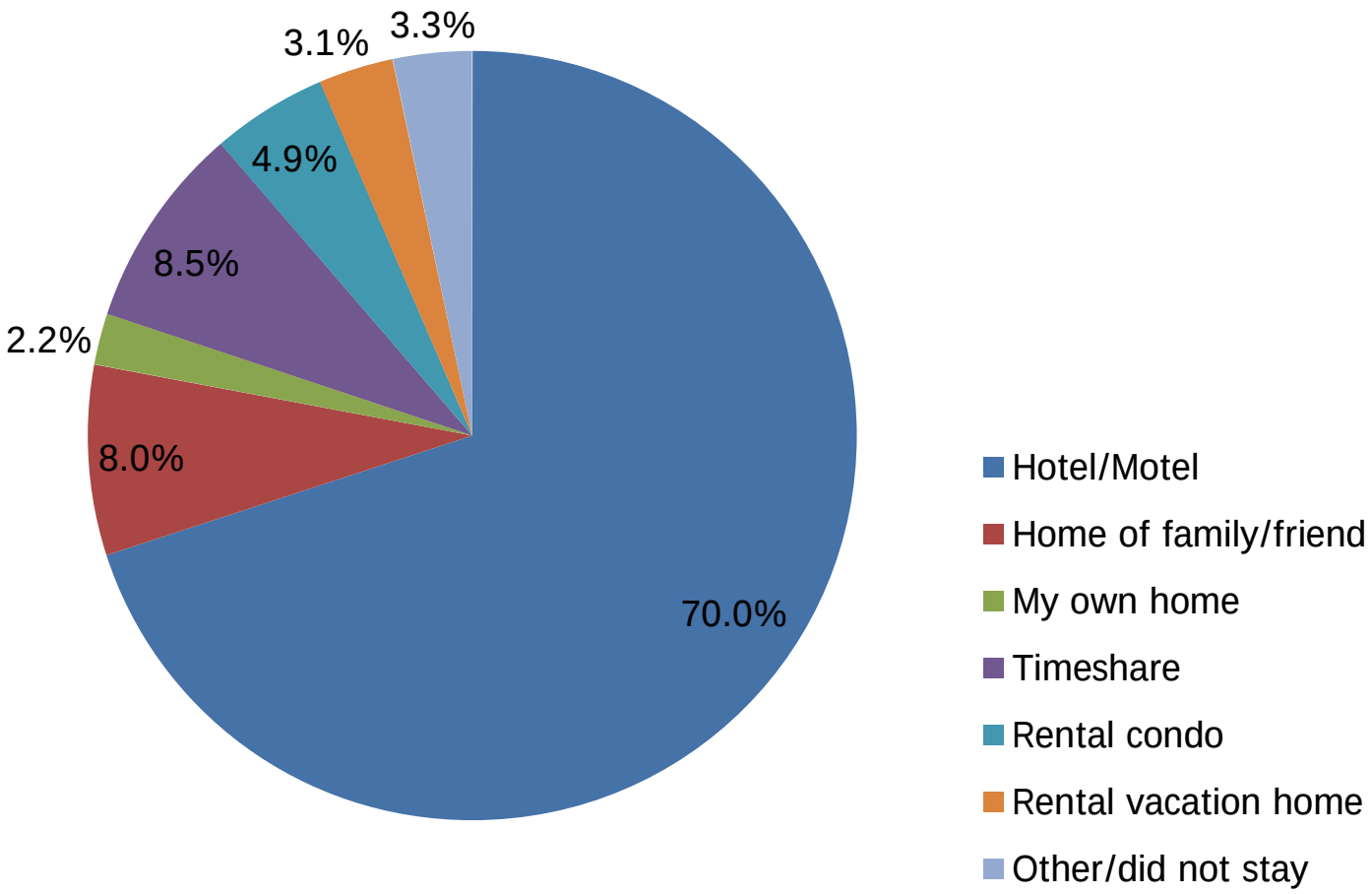
Kissimmee visitation – stay location

On your most recent visit to Kissimmee, where did you stay?



The significant majority of visitors stayed in a *hotel/motel*. But nearly 10% (each) stayed at the *home of family/friends* or *timeshare*. *Rental homes/condos* were used by only 8% of visitors.

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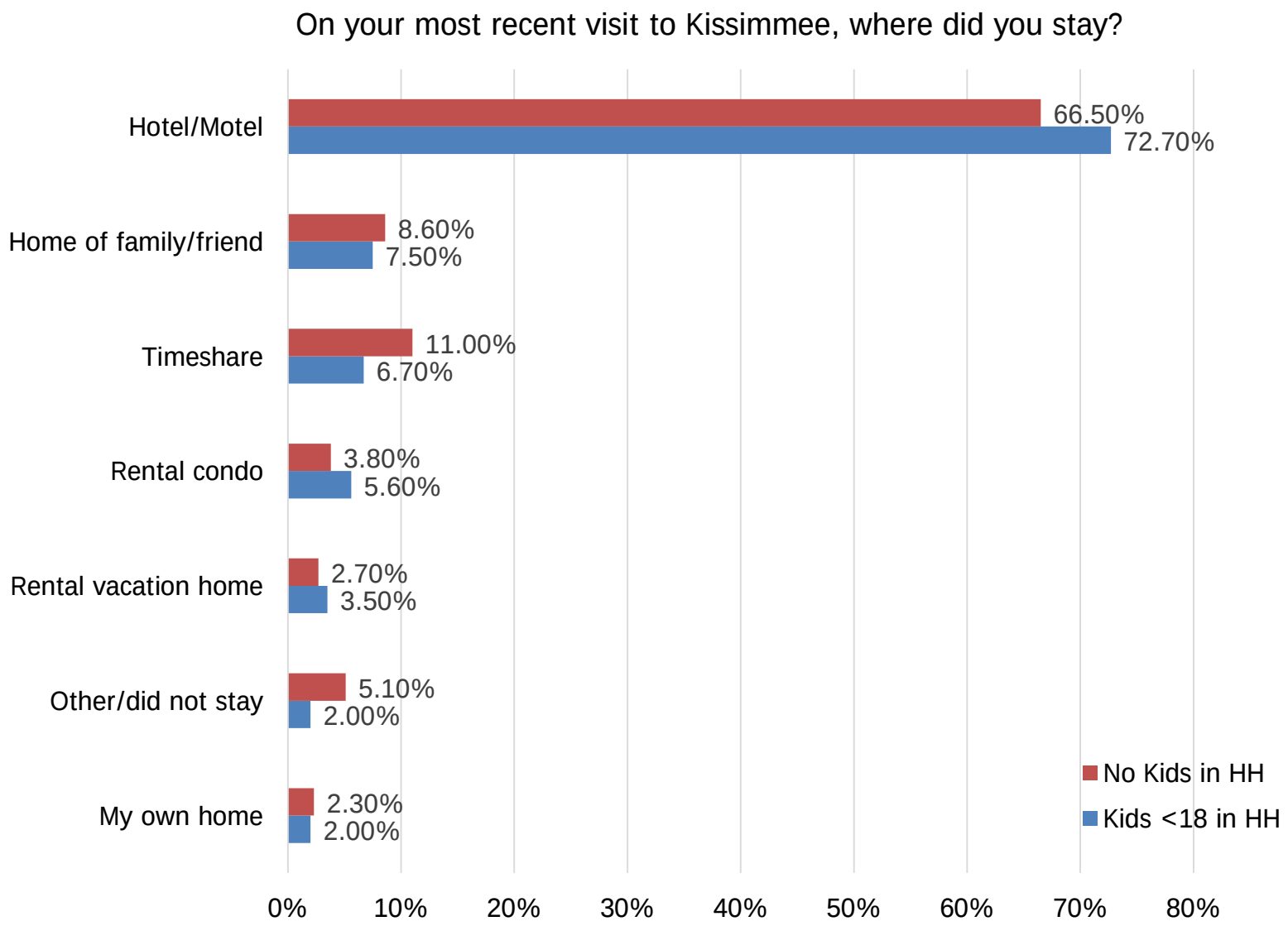
Kissimmee visitation – stay location (2)



While there is some degree of non-hotel accommodations usage, there is clearly room for growth in this area among both target segments.

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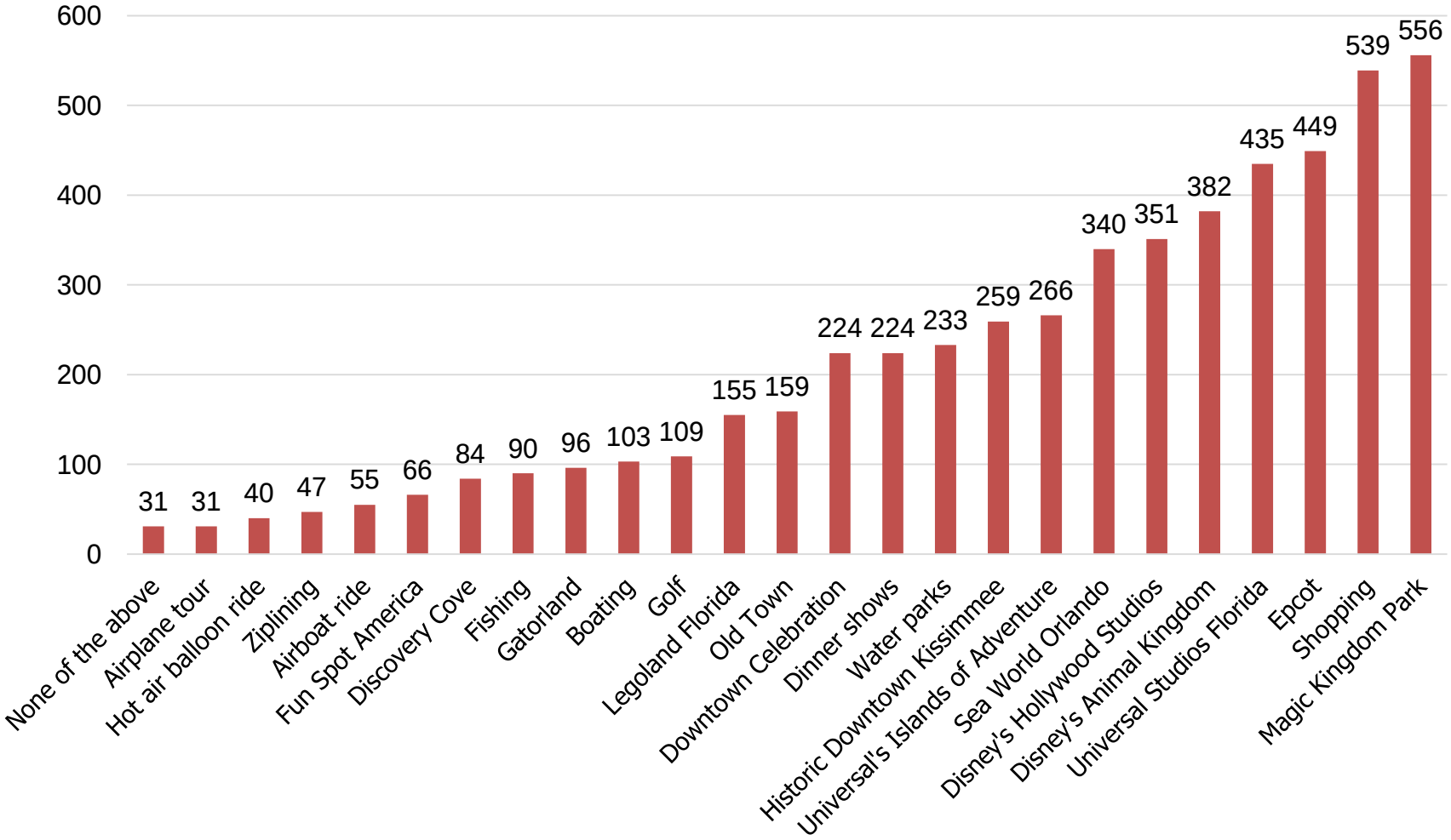
Attractions & activities engaged in

On your most recent visit to Kissimmee, which of the following attractions or activities did you visit or take part in? (check all that apply)



Visiting area theme parks were the top activities in the Kissimmee area, with park visits dominating the top 8 activities. However, s*hopping* the second most-mentioned activity. And use of Historic Downtown Kissimmee on par with Islands of Adventure.

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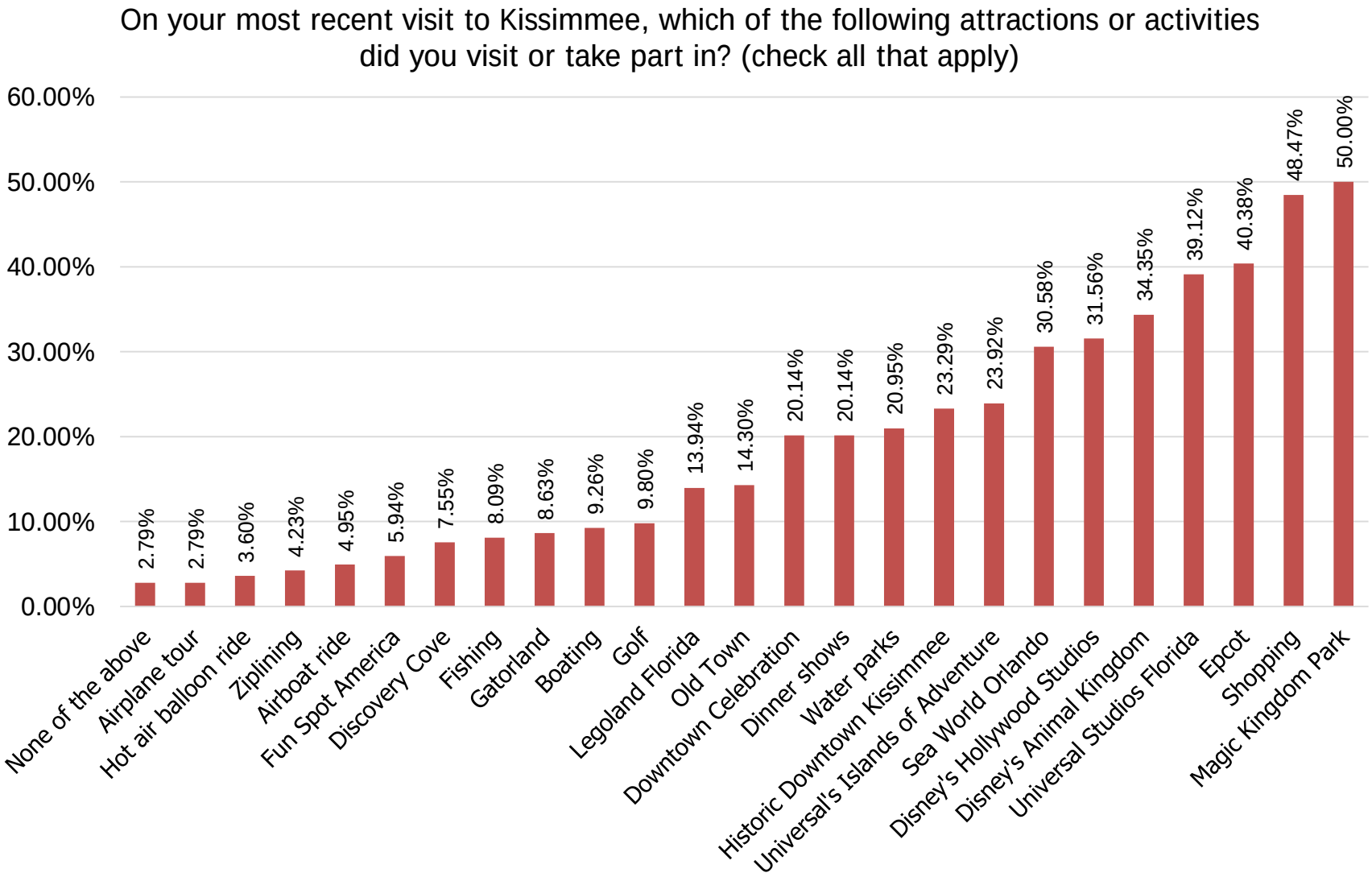
Attractions & activities engaged in



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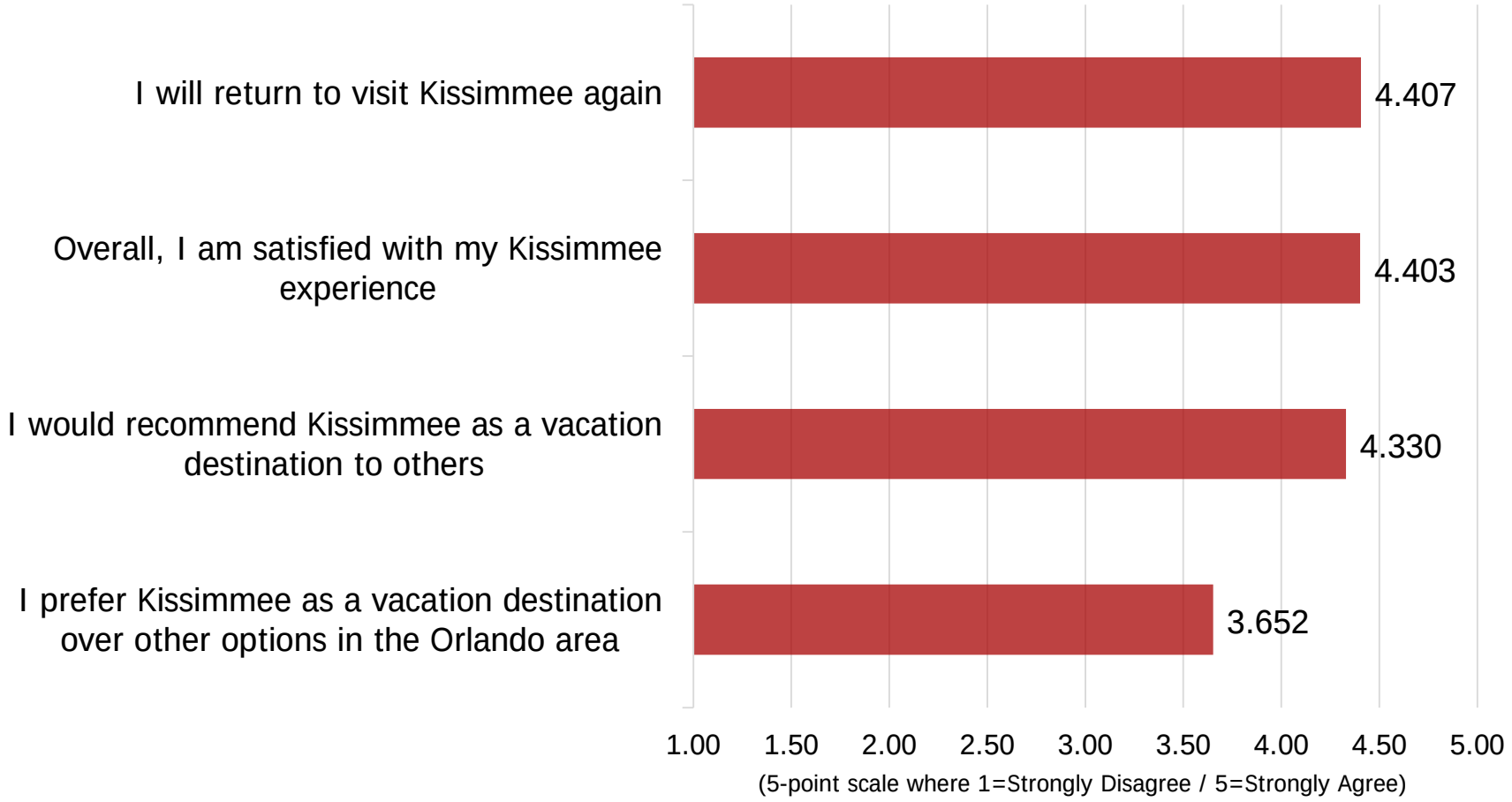
Kissimmee satisfaction indicators

Indicate your level of agreement with the following statements about traveling to Kissimmee:



Respondents who had already visited Kissimmee reported high levels of return intent, overall satisfaction, and willingness to recommend Kissimmee (all three comprise key net promoter scores). However, preference for Kissimmee over other Orlando destinations is lower (thought still strong). Clearly this is the score to watch for movement over time.

Implications – Kissimmee visitation & satisfaction

- Two-thirds of respondents had visited Kissimmee.
  - Implication: Opportunity for future growth in this percentage. (Though perhaps not among the 3% who were 'not sure' if they had ever been to Kissimmee!)

- Rather strong recency of visits, and even distribution across measurement periods.
  - Implication: Continue to strive for this sort of consistent distribution.
  - Implication: As an addition to these two measures (*ever* and *frequency*), consider addition of measure for 'total # of lifetime visits to Kissimmee.'

- Strong incidence of longer stays, 3+ days, but primarily in hotels.
  - Implication: Explore how to optimize marcomm to these visitors to communicate Kissimmee's range of multi-day accommodation options (homes, condos, etc.).
  - Implication: Consider how to deliver non-hotel accommodation information in visitor-centric formats (e.g. 'with x-y-z miles of theme parks,' or 'closest to activity x-activity y-activity z' and so on.)

- Wide range of activities used—but primary activities theme parks and shopping.
  - Implication: Determine feasibility, cost:benefit of increasing marcomm emphasis on non-theme park activity.
  - Implication: Assess potential for aggressive 'comparative marcomm' that shows Kissimmee as better option vs. other areas, thus dispelling misperceptions. (e.g. 'Kissimmee is xx miles closer to Disney main gate than any I-Drive hotel.')

Implications – Kissimmee visitation & satisfaction (2)

- Strong levels of 'Kissimmee satisfaction.'
  - Implication: Consider using 'quantification' of these data points in marcomm messaging (e.g. xx% of visitors prefer Kissimmee as a vacation destination vs. other Orlando options.')

Perceptions of Kissimmee (All Respondents)

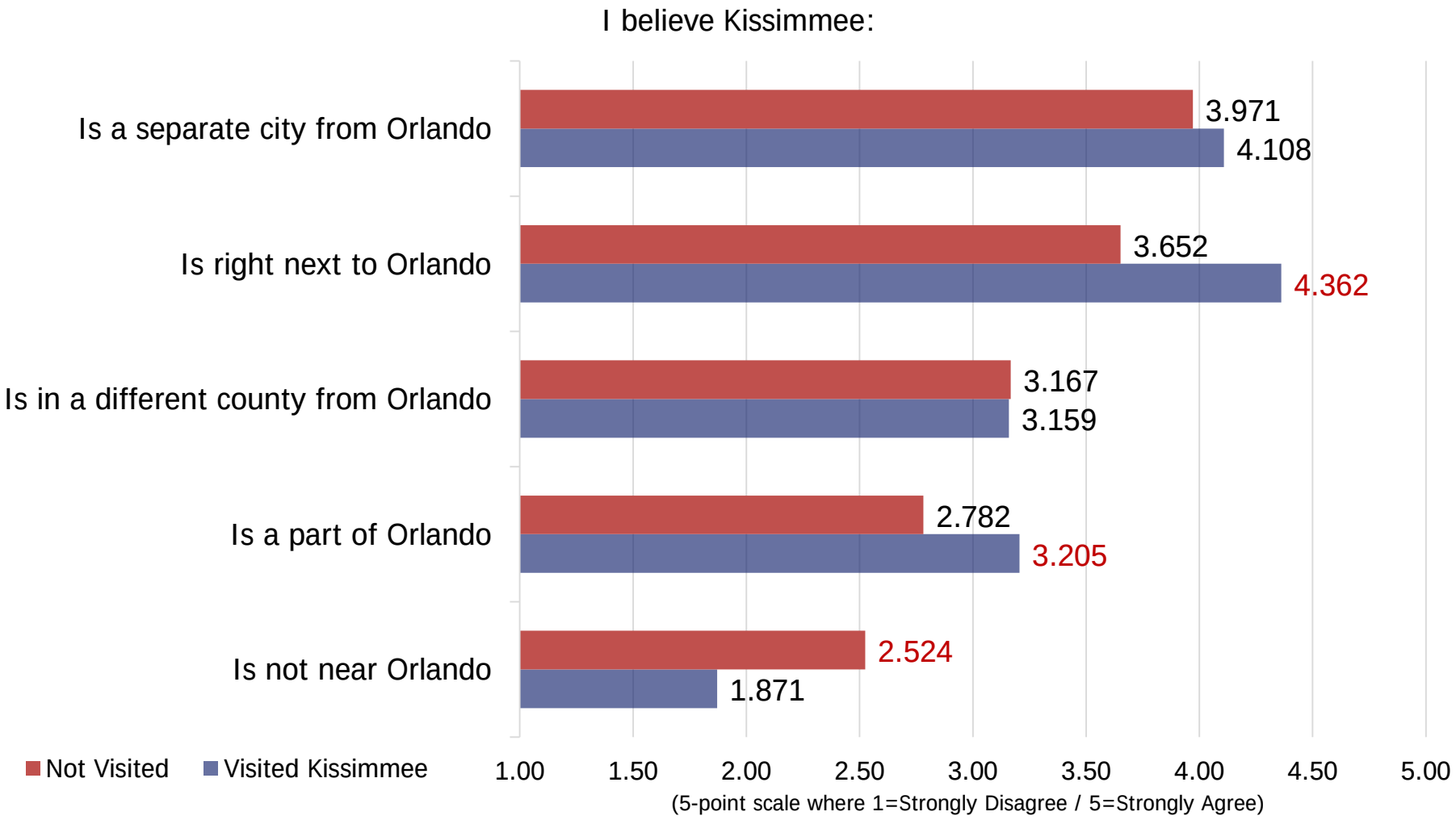
Perceptions of Kissimmee - comparisons

- In this section, respondents are divided into two segments:
  - Those who have ever visited Kissimmee in the past (n=1112)
  - Those who have not visited Kissimmee (n=488)

- Statistical differences between the two groups were analyzed at $p<.01$ using independent samples paired t-tests

- Statistically significant differences between the two groups are indicated by red type.

Kissimmee and Orlando



Respondents were generally aware that Kissimmee is *separate from Orlando*, but were unsure about it being in a *different county*. Those who had visited Kissimmee were better informed than those who had not visited. And, interestingly, those who have visited Kissimmee perceive it to be *close to Orlando*—a strong positive.

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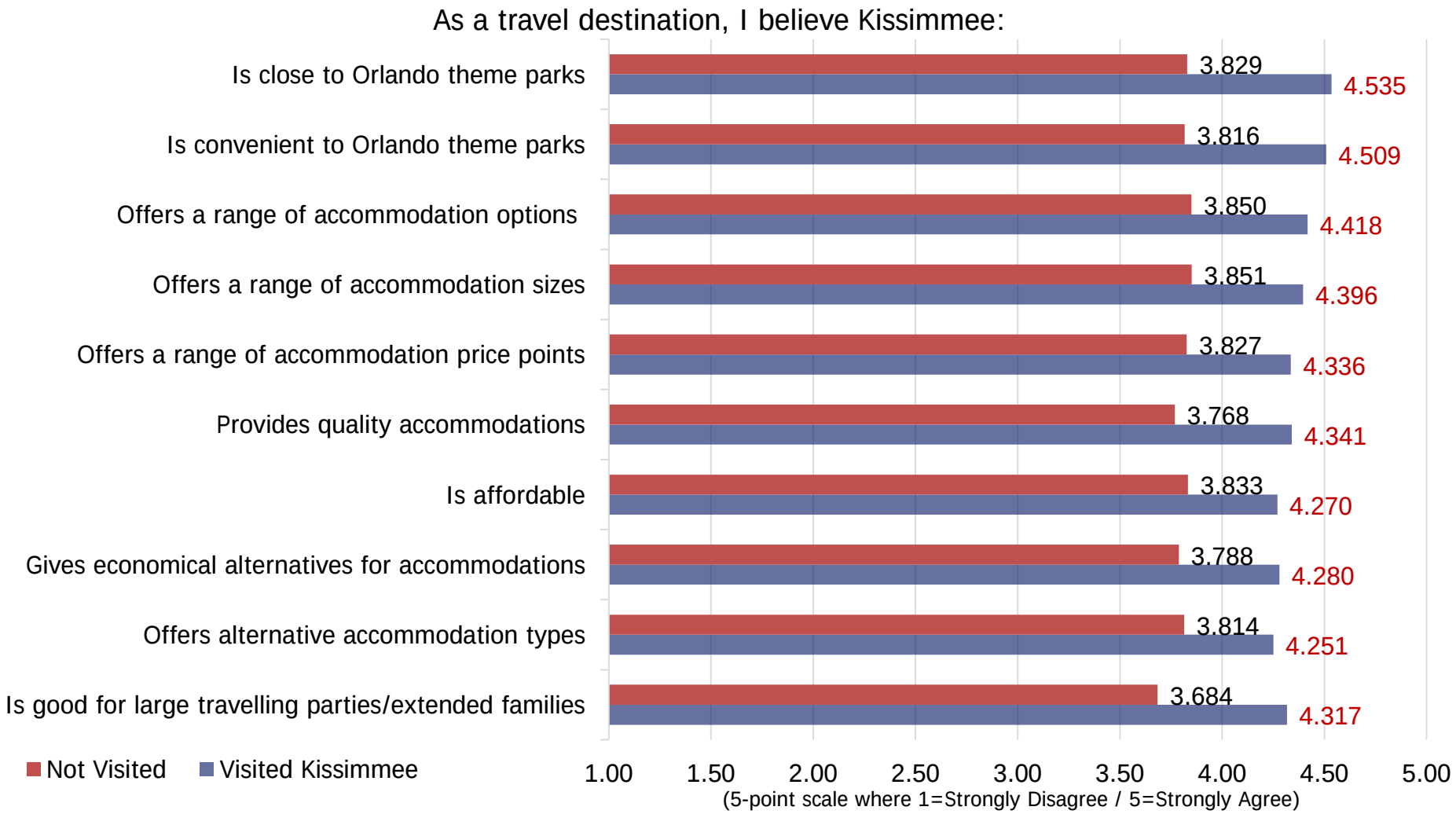
Kissimmee as a travel destination



Those who had visited Kissimmee were significantly more likely to agree to all questions—an indicator of positive perceptions. Respondent agreement was closest about proximity and convenience to Orlando theme parks, followed by flexibility in accommodations and price. The most significant gaps are in *quality accommodations* and *good for large parties.*

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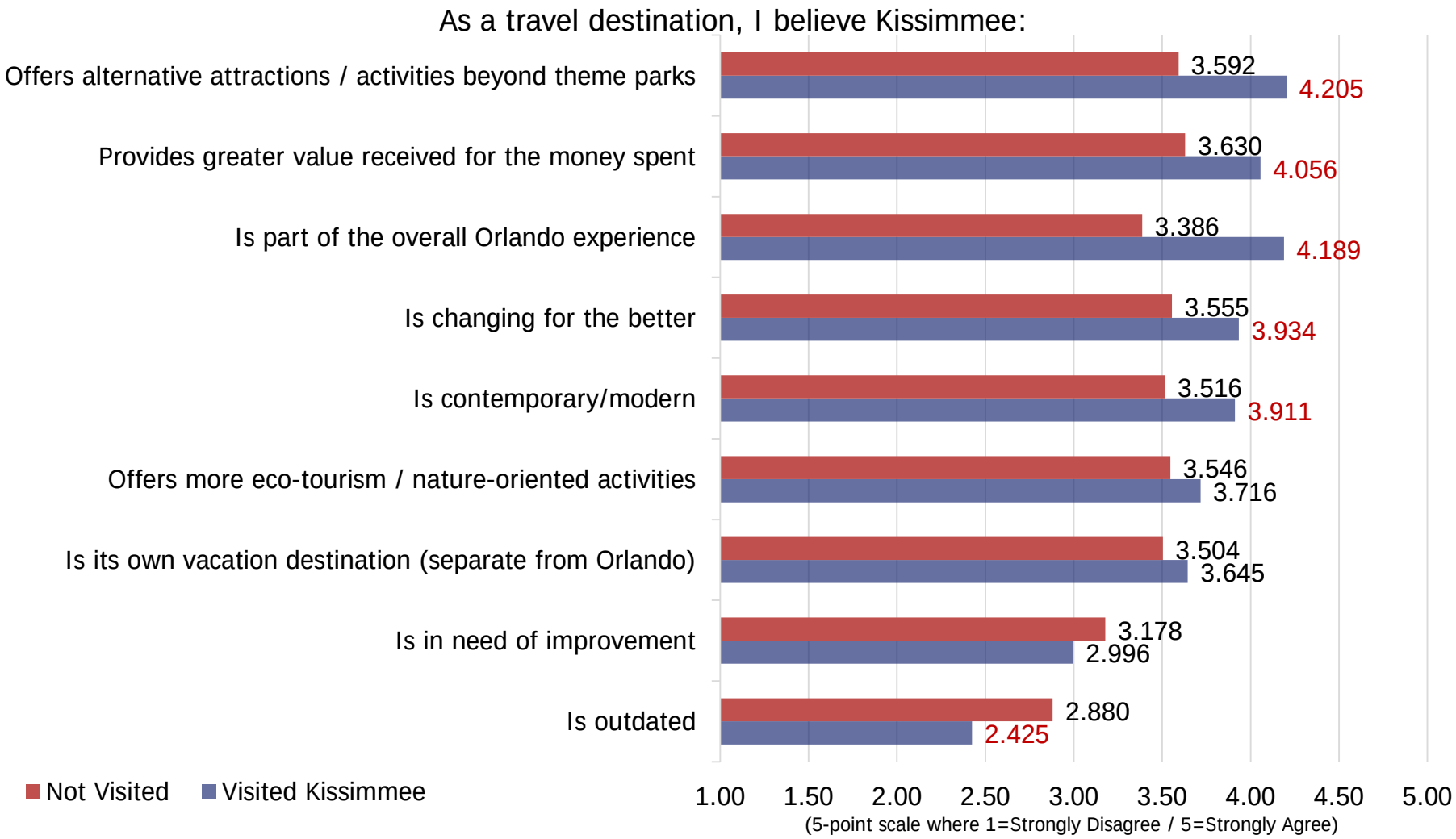
Kissimmee as a travel destination (2)



Kissimmee visitors tend to rate Kissimmee more highly on all key measures, with *offers alternative attractions* very strong. Determination needed whether *part of the Orlando experience* is a positive or negative. And both groups of respondents generally were less likely to agree Kissimmee is *outdated or in need of improvement*—a good sign.

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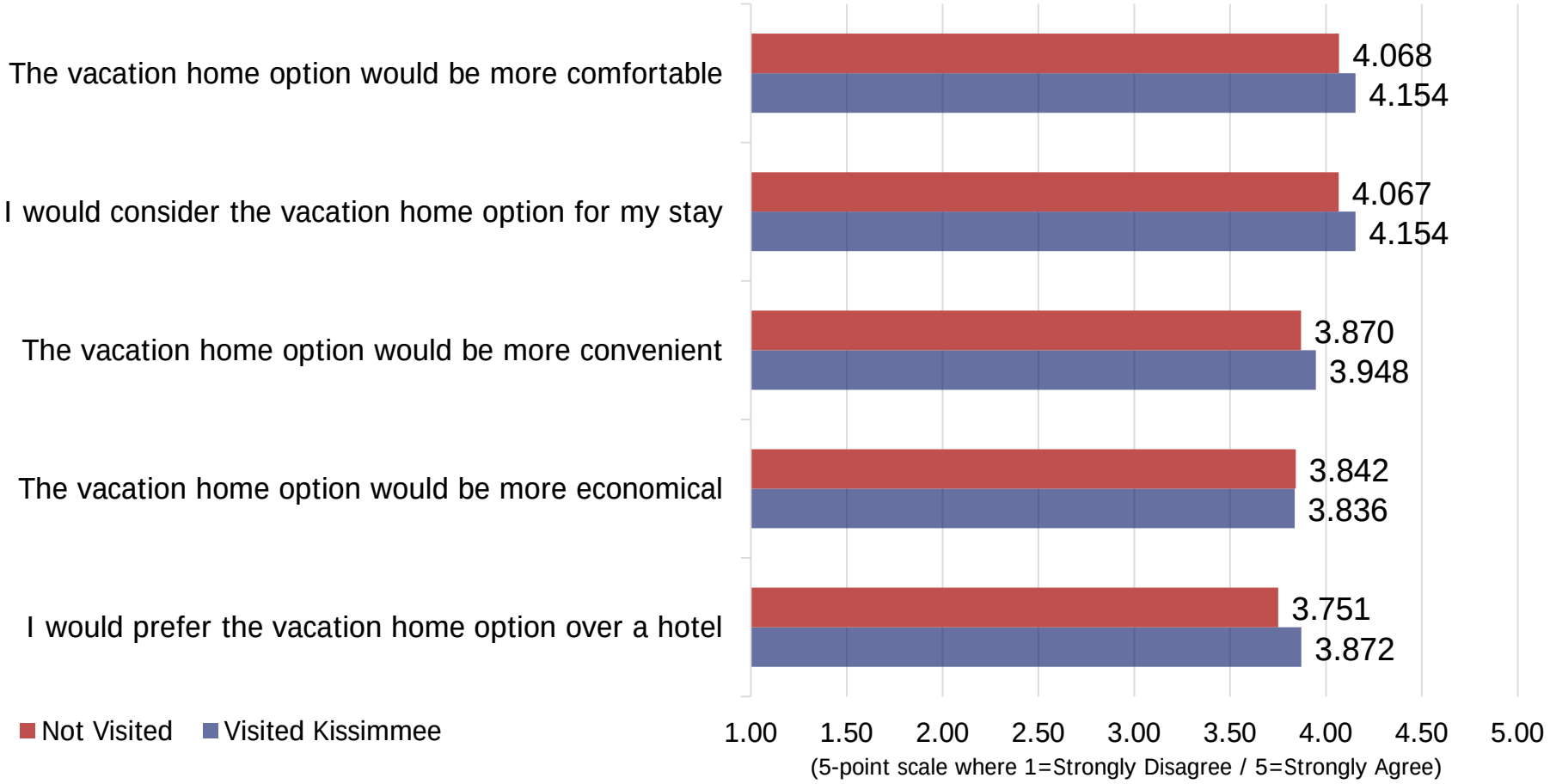
Rental home interest – by past visitor

Think about the option to stay in a fully-furnished vacation home as a short-term rental when visiting the Orlando area and indicate your agreement with the following statements:



Respondents were receptive to the idea of a fully-furnished, short-term vacation home rental option when visiting the Orlando area. However, potential room for improvement on *more economical* and *prefer over hotel* measures. There were no statistically significant differences between those who have or have not visited Kissimmee.

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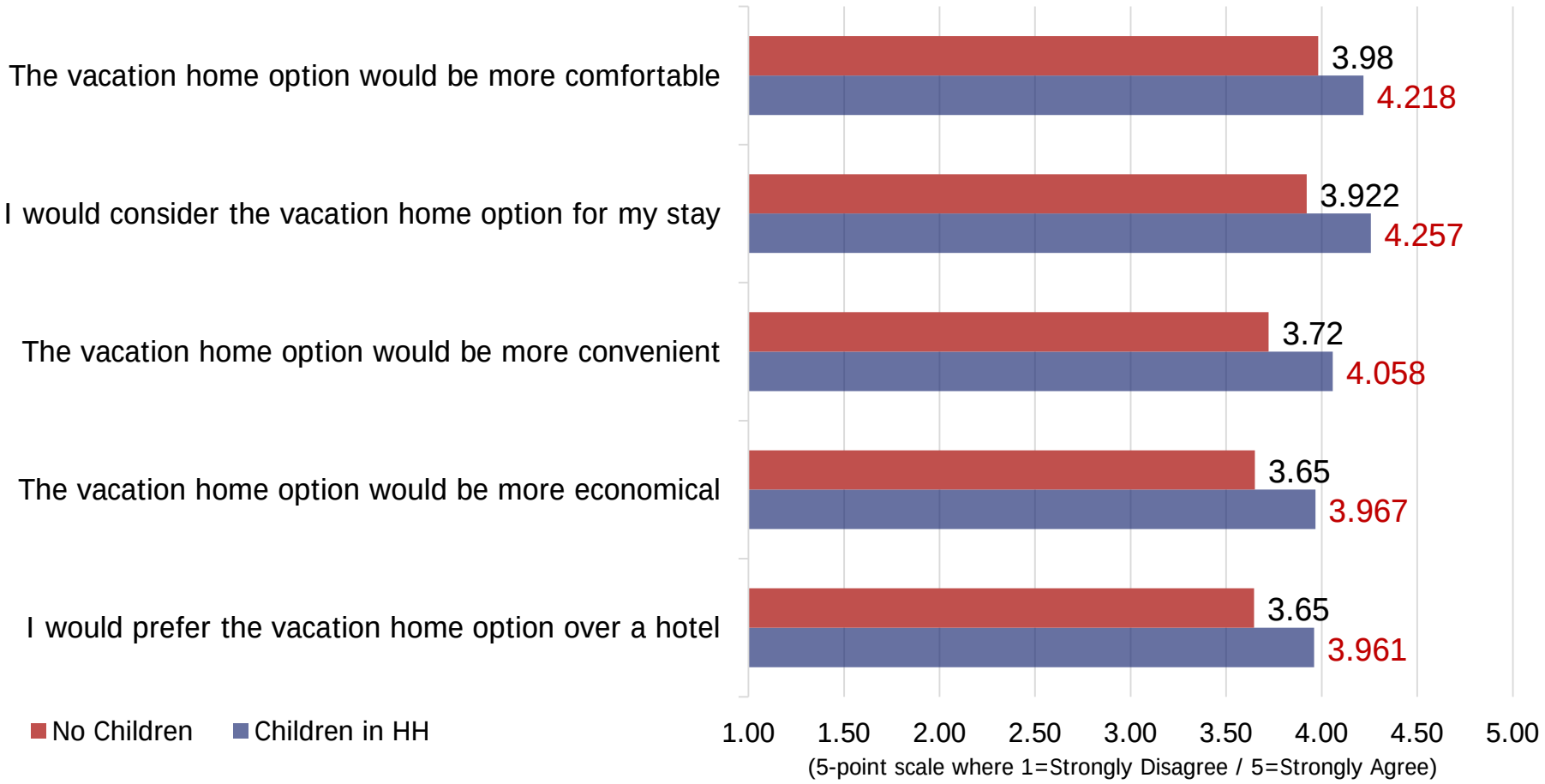
Rental home interest – by family

Think about the option to stay in a fully-furnished vacation home as a short-term rental when visiting the Orlando area and indicate your agreement with the following statements:



Respondents with children in their families were statistically significantly more receptive to the idea of a fully-furnished, short-term vacation home rental option when visiting the Orlando area. In particular, families with children are much more likely to consider the option.

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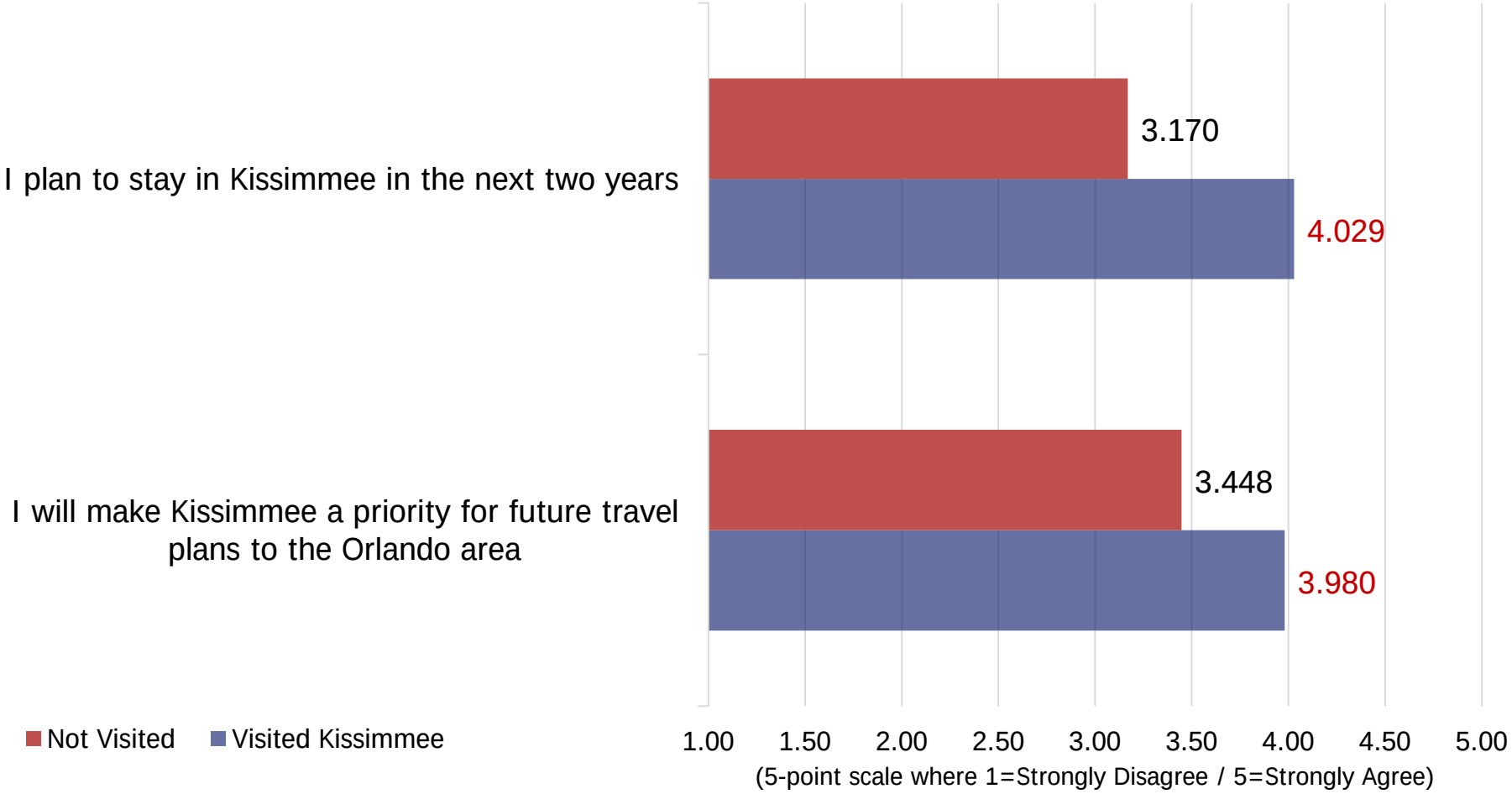
Future Kissimmee visit intentions

Indicate your level of agreement with the following statements about traveling to Kissimmee:



Kissimmee visitors were significantly more likely than non-visitors to agree that they will *stay again* and *make Kissimmee a priority for future travel plans*. But scores on both measures show room for future improvement.

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Implications – Kissimmee perceptions

- Kissimmee does have a distinct identity apart from Orlando
  - Implication: Explore messaging that highlights uniqueness and proximity as Kissimmee attributes (e.g. 'different from Orlando, but not a world away').

- Respondents who have visited Kissimmee have much better knowledge and opinions about Kissimmee than those who have never visited.
  - Implication: Consider ways to optimize 'what visitors know' and how they might share 'Kissimmee insights' with non-visitors via social media platforms, etc.

- Strong evaluations of Kissimmee on dimensions relating to convenience and options, especially from past visitors. But weaker evaluations on the more 'Kissimmee-unique dimensions.'
  - Implication: Opportunity for growth in assessments of Kissimmee-unique dimensions.
  - Implication: Opportunity to weave those Kissimmee-unique dimensions into marcomm that addresses Kissimmee's more significant 'power drivers.'

- And a strong opportunity to build knowledge among non-visitors.
  - Implication: Consider non-visitor targeted messaging to address 'what you never knew about Kissimmee.'

Implications – Kissimmee perceptions (2)

- Interest in non-hotel accommodations is strong, with *comfort* the leading interest driver. But some room for increases in perceptions re: *convenient* and *economical*.
- Room for growth also in expressed preference for consideration of non-hotel options over hotels.
  - Implication: Examine how to optimize these findings in communications.
  - Implication: In subsequent research waves, consider addition of specific questions for the small response population that has stayed in non-hotel accommodations. These questions would provide greater insight and potential messaging content for marcomm re: non-hotels as a Kissimmee option.

- Revisit intent scores are high for past visitors, but there is room for growth among non-visitors. And there is clear room for increases in 'make Kissimmee a priority' scores.
  - Implication: Consider qualitative research at some point to explore these two issues and determine potential issues, messaging or other drivers that might enhance these scores.
  - Implication: Consider adding key measures to facilitate comparisons:
    - Visited Orlando; plan to stay in Orlando within 2 years.

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