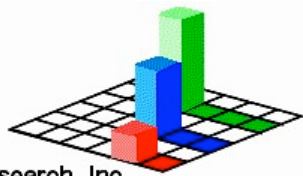


FLAGLER COUNTY VISITOR PROFILE

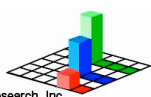
2011 - 2012



Mid-Florida Marketing & Research, Inc.

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MISSION

To determine the Profile of Visitors to Flagler County, Florida.

METHODOLOGY

A telephone survey was conducted with a sample of 1,020 guests at Flagler County accommodations, after they had returned home.

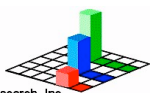
Respondents were randomly selected from a sample of Hotels, Motels, Condo and Home rentals and Bed & Breakfast properties in Flagler County.

A total of 8,000 records were reviewed, determining origins of visitors and length of stay in Flagler County.

The interview lasted 8-12 minutes for each respondent; and interviews took place days, evenings and weekends in order to assure a balanced sample.

Information gathered included (but was not limited to):

- ✓ Reason for visit
- ✓ Activities while in Flagler County
- ✓ Source of travel information
- ✓ Internet, Social Media and OTA (Online Travel Agency) use
- ✓ Purchase/booking behavior
- ✓ Party demographics
- ✓ Lead time in destination choice and purchase/booking
- ✓ Transportation
- ✓ Other vacation destinations and propensity to take more trips
- ✓ Satisfaction with Flagler County experience
- ✓ Media use (Cable TV, magazines, etc.)
- ✓ Daily expenditures for tourism related items (i.e. accommodation, food and beverage, admissions, souvenirs, etc.)

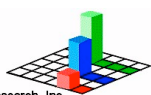


A committee of hospitality stakeholders reviewed the survey instrument before interviews began.

Data was analyzed with **Survey Gold Pro Edition TM** software, accomplishing standard tests of validity on each question.

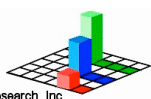
Data was stratified quarterly and reports issued to TDC staff.

The confidence level in this data is 89% +5%. That is, the data is accurate for 89% of the surveyed population (Visitors to Flagler County who Stay Overnight in paid accommodation) within 5% on each question. This is industry standard.



FLAGLER COUNTY AT A GLANCE 2011 - 2012

FIRST TIME VISITORS COMBINED (%)	43	
From Florida		35
Out - of State		50
MORE THAN ONE VISIT-LAST 5 YEARS COMBINED (%)	93	
From Florida		90
Out - of State		95
MAIN REASON FOR TRIP COMBINED (REASON)		CLOSE TO HOME
From Florida		CLOSE TO HOME
Out - of State		WEATHER
USED INTERNET TO PLAN TRIP COMBINED (%)	51	
From Florida		44
Out - of State		57
USED INTERNET TO CHOOSE A PLACE TO STAY COMBINED (%)	46	
From Florida		39
Out - of State		53
USED INTERNET TO MAKE RESERVATIONS COMBINED (%)	37	
From Florida		41
Out - of State		34
AVERAGE TRAVEL PARTY SIZE COMBINED (PEOPLE)	3.2	
From Florida		3.1
Out - of State		3.2
TRAVELED WITH CHILDREN UNDER 13 YEARS OF AGE COMBINED (%)	15	
From Florida		14
Out - of State		15
TRAVELED WITH TEENAGERS 13-17 YEARS OF AGE COMBINED (%)	9	
From Florida		10
Out - of State		9
TRAVELED WITH NO ONE UNDER 18 YEARS OF AGE COMBINED (%)	76	
From Florida		76
Out - of State		76
TRAVELED BY AIR COMBINED (%)	14	
From Florida		0
Out - of State		28
TRAVELED BY AUTO COMBINED (%)	86	
From Florida		100
Out - of State		72
AVERAGE LENGTH OF STAY COMBINED (DAYS)	5.2	
From Florida		2.9
Out - of State		7.5
AVERAGE DAILY EXPENDITURE COMBINED (\$)		\$105.00
From Florida		\$95.00
Out - of State		\$115.00
# 1 ACTIVITY COMBINED (ACTIVITY)		WALKING BEACH
From Florida		WALKING BEACH
Out - of State		WALKING BEACH
# 2 ACTIVITY COMBINED (ACTIVITY)		ST. AUGUSTINE
From Florida		VISITING FAMILY/FRIENDS IN AREA
Out - of State		ST. AUGUSTINE
% VISITORS USA		94
% VISITORS CANADA		4
% VISITORS INTERNATIONAL		2
# 1 POINT OF ORIGIN COMBINED (STATE)		FLORIDA
# 2 POINT OF ORIGIN COMBINED (STATE)		GEORGIA

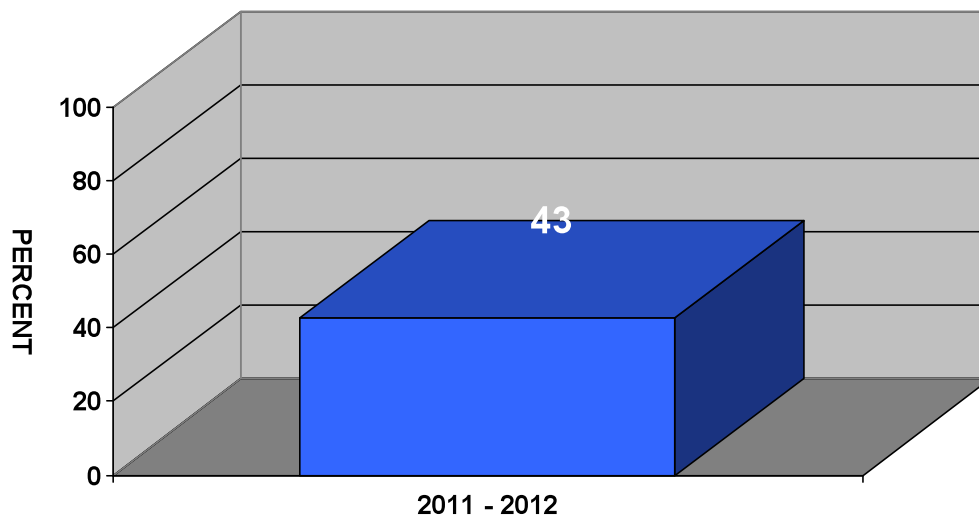


OUT OF STATE VISITORS

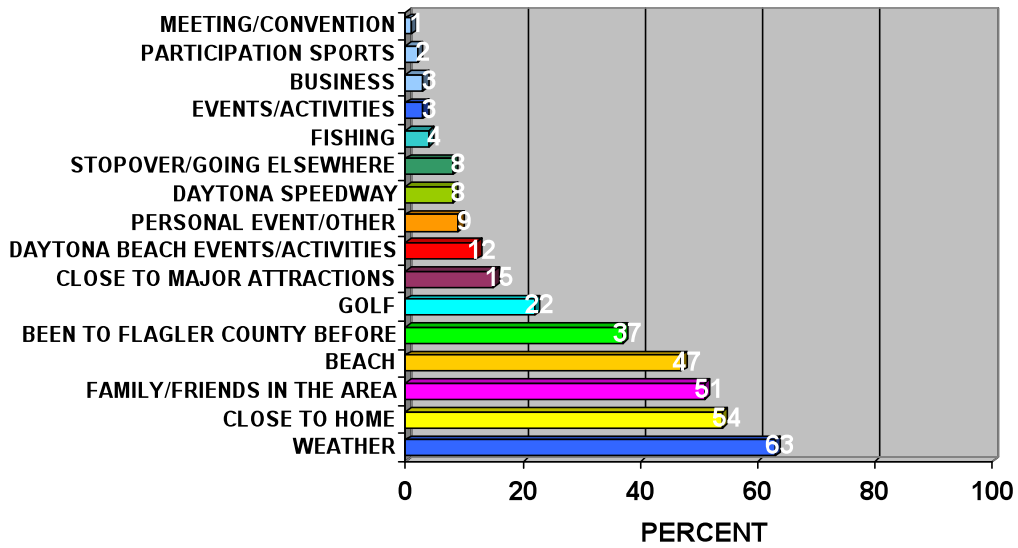
2011 - 2012 Flagler County Visitor Profile

- ◆ For 50% of the out of state visitors, this was their first visit ever to the Flagler County.
- ◆ 95% of the repeat out of state visitors have stayed in the Flagler County Area overnight or longer more than once during the past five years.
- ◆ 60% of the repeat out of state visitors have stayed in the same lodging before.

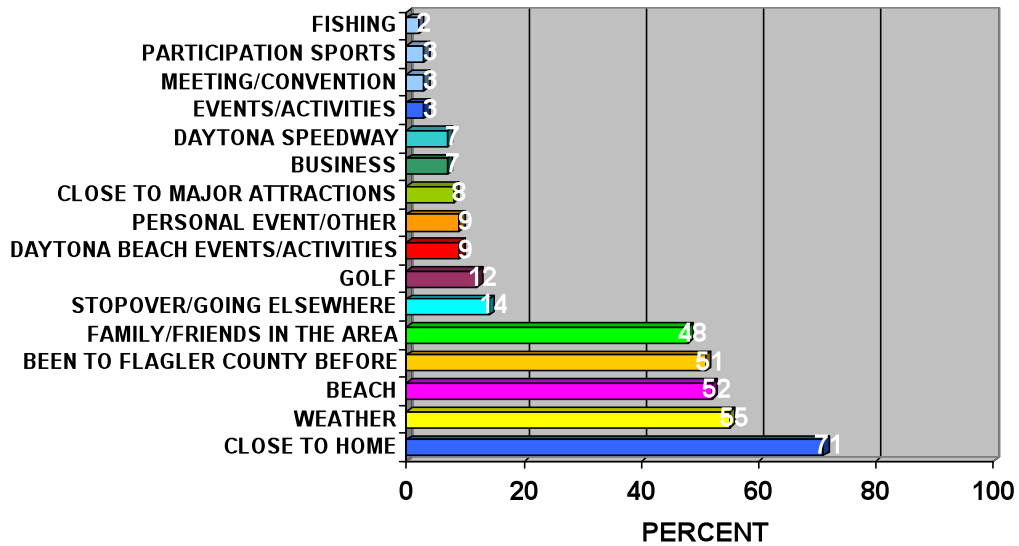
FIRST TIME VISITORS



REASONS FOR OUT OF STATE VISITORS TO CHOOSE FLAGLER COUNTY WERE:

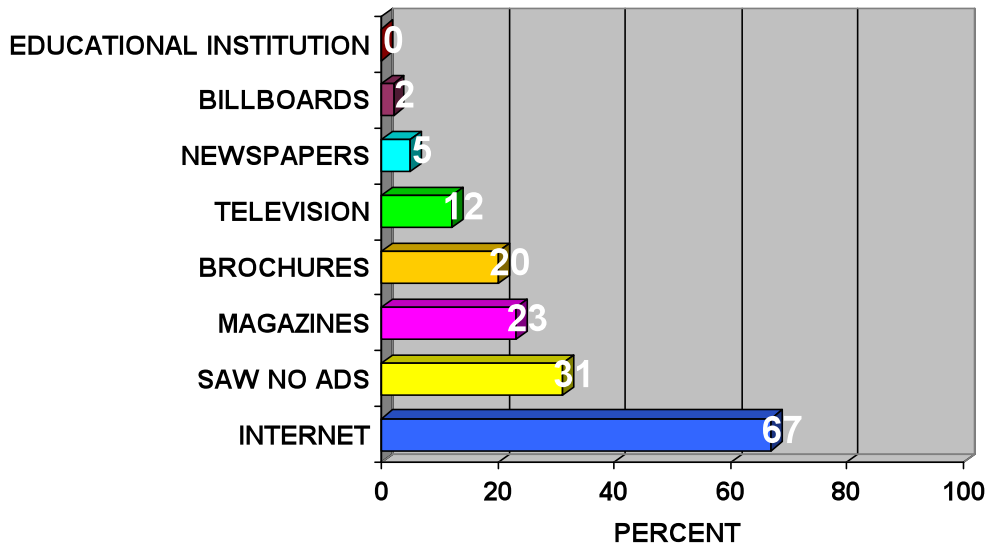


REASONS FOR VISITORS TO CHOOSE FLAGLER COUNTY WERE:



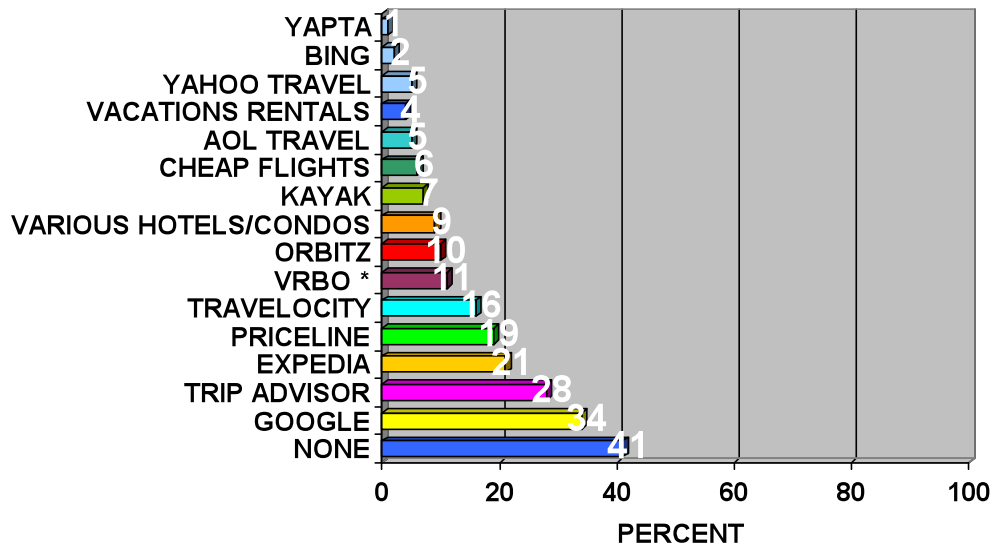
Includes total group of visitors from Florida and out of state.

OUT OF STATE VISITORS REMEMBER SEEING ADS FOR FLAGLER COUNTY IN/ON:



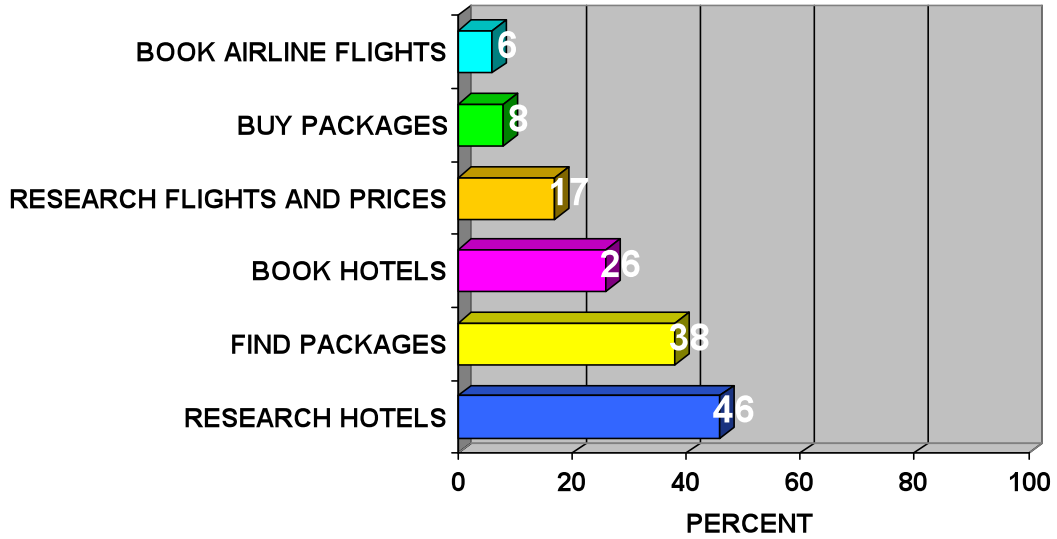
- ◆ 58% of the out of state visitors asked for information before coming.
- ◆ 57% used the Internet to plan their trip to Flagler County.
- ◆ 53% used the Internet to choose a place to stay.
- ◆ 34% used the Internet to make reservations.
- ◆ 66% used the Internet for other purposes regarding this trip to Flagler County such as:
 - 41% Finding general information about the area.
 - 34% Traveling directions/map.
 - 15% Car rental information/rentals.

TRAVEL WEBSITES USED BY OUT OF STATE VISITORS:

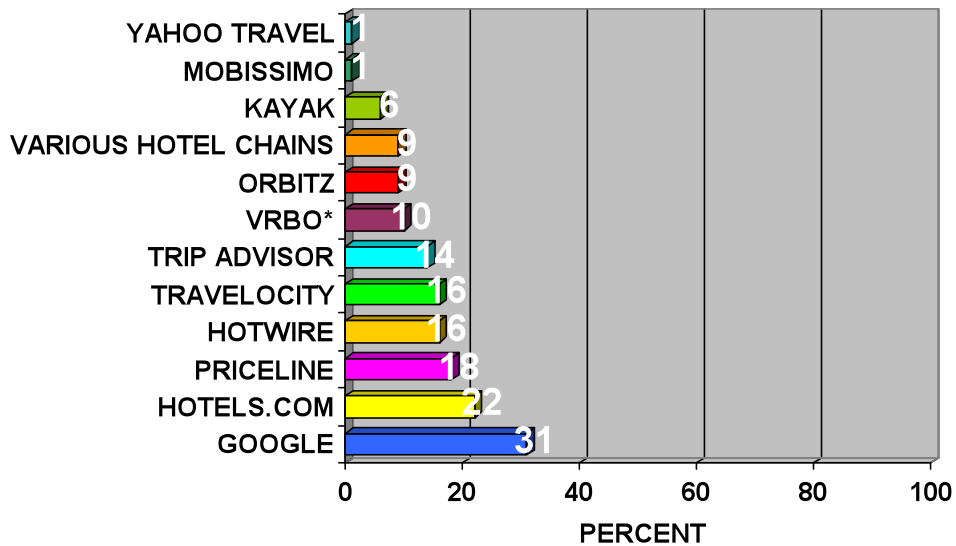


*Vacation Rentals By Owner

OUT OF STATE VISITORS USE TRAVEL WEBSITES FOR:

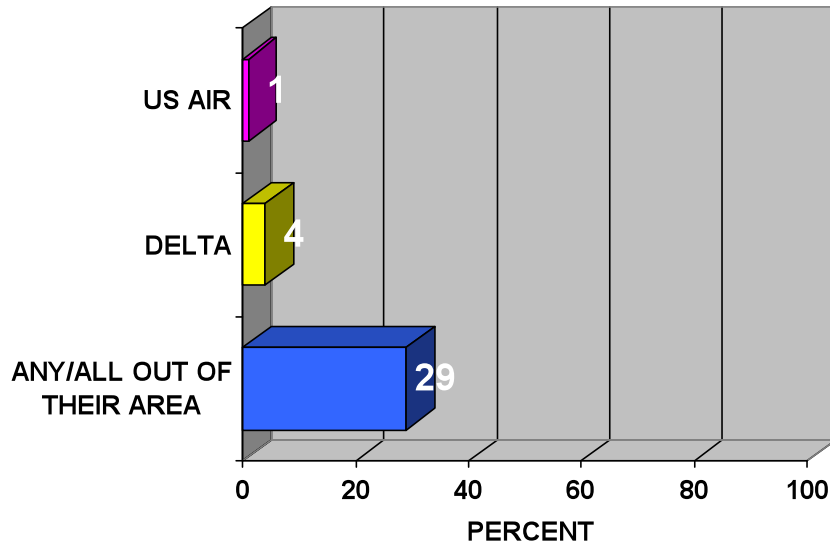


TRAVEL WEBSITES USED BY OUT OF STATE VISITORS FOR HOTELS:



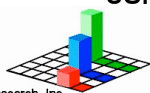
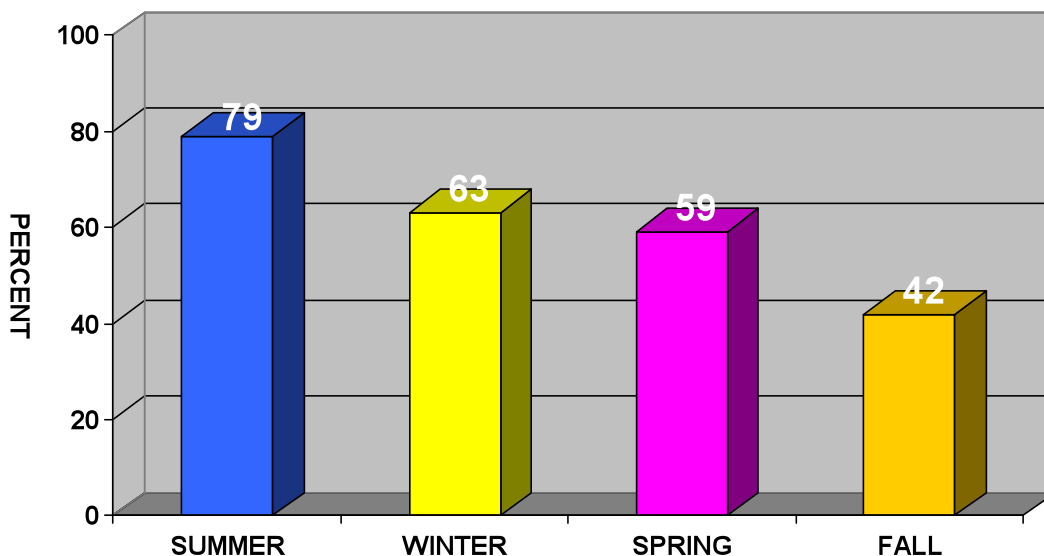
*Vacation Rentals By Owner

TRAVEL WEBSITES USED BY OUT OF STATE VISITORS FOR AIRLINES:

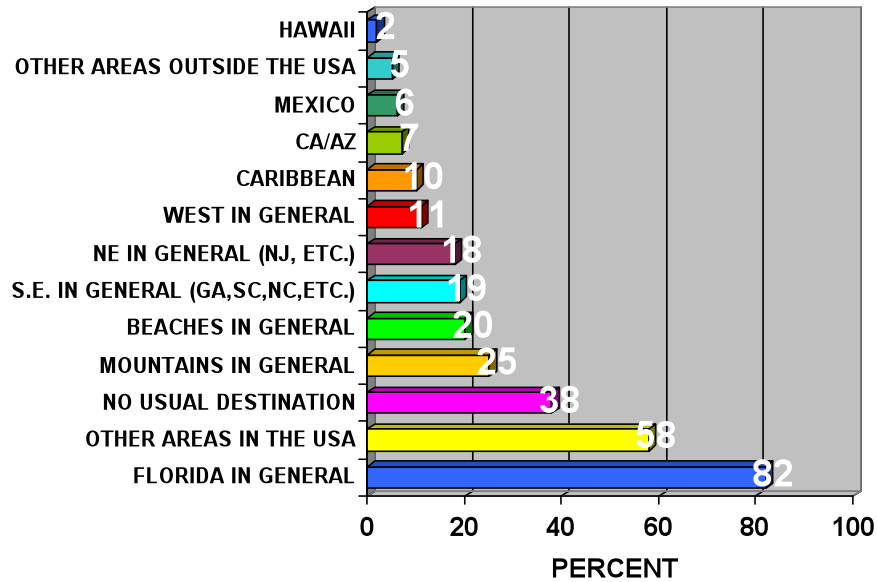


- ◆ 100% of the out of state visitors do not use any other websites.
- ◆ 42% of the out of state visitors are on Facebook
 - 98% use Facebook to let friends know what is new, 98% to see what is new with their friends, and 81% to talk about activities/vacations.
- ◆ 16% of the out of state visitors use Twitter.
- ◆ 100% of the out of state visitors did not use any other social networking programs.
- ◆ 44% of the out of state visitors take more than one vacation per year.

OUT OF STATE VISITORS WHO TAKE MORE THAN ONE VACATION PER YEAR, GO IN:

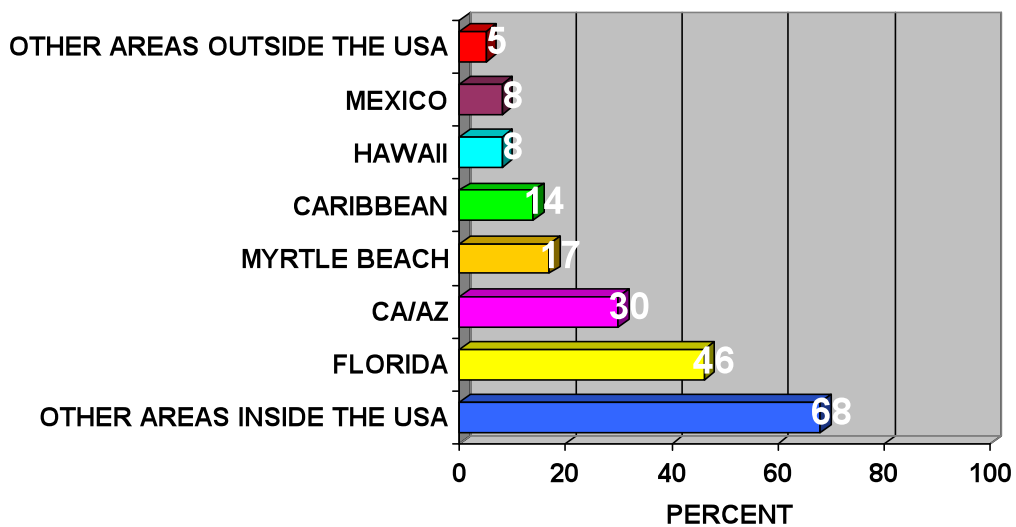


OUT OF STATE VISITORS WHO TAKE MORE THAN ONE VACATION PER YEAR ALSO VACATION IN:

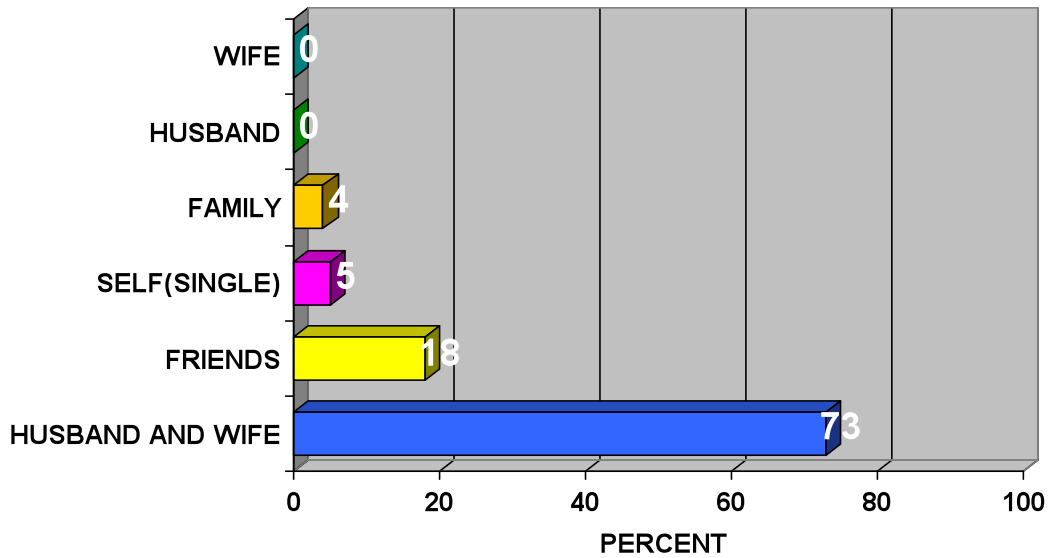


- ◆ 65% of the out of state visitors have taken another warm weather vacation in the past five years.

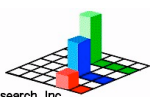
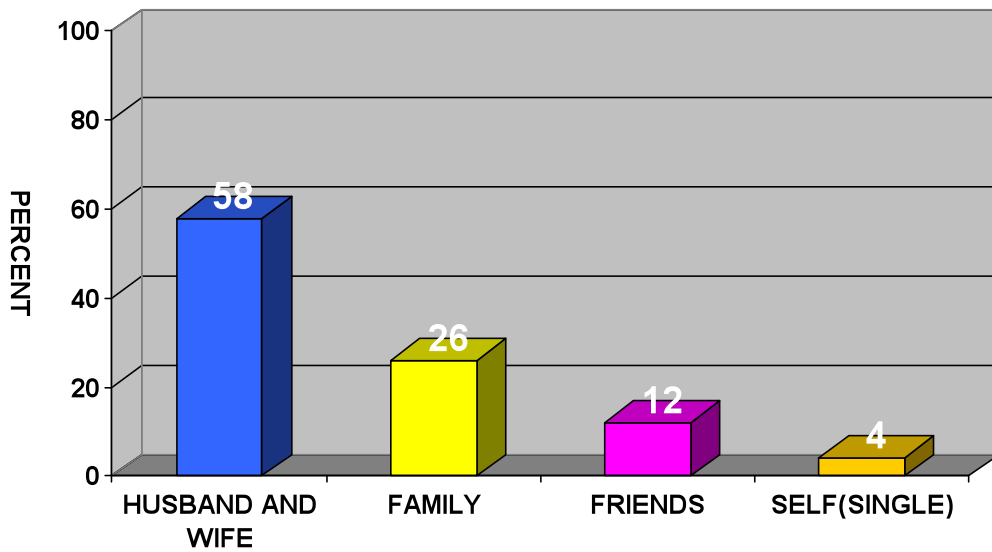
OUT OF STATE VISITORS WHO HAVE TAKEN ANOTHER WARM WEATHER VACATION IN THE PAST 5 YEARS ALSO VACATION IN:



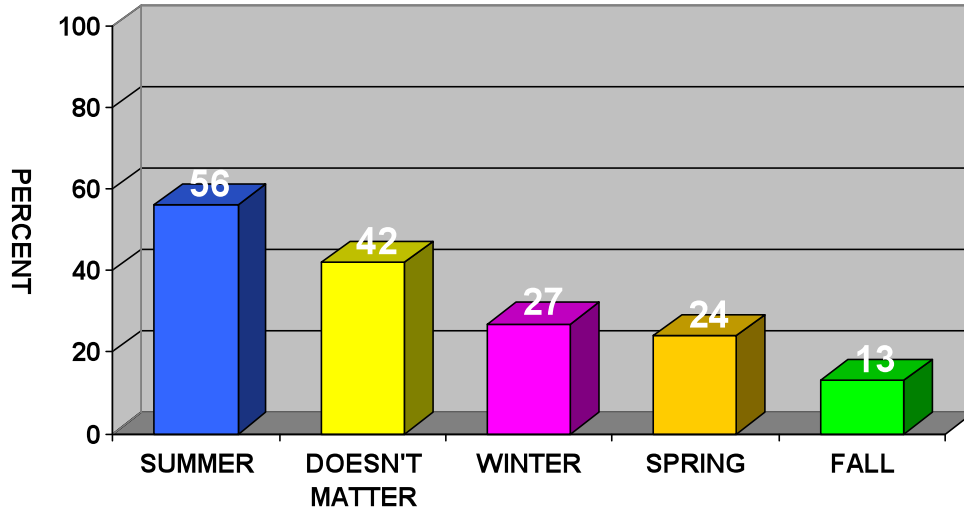
**THE DECISION TO VISIT FLAGLER COUNTY FOR
OUT OF STATE VISITORS WAS MADE BY:**



**OUT OF STATE VISITORS SAID THEIR
VACATION WAS FOR:**

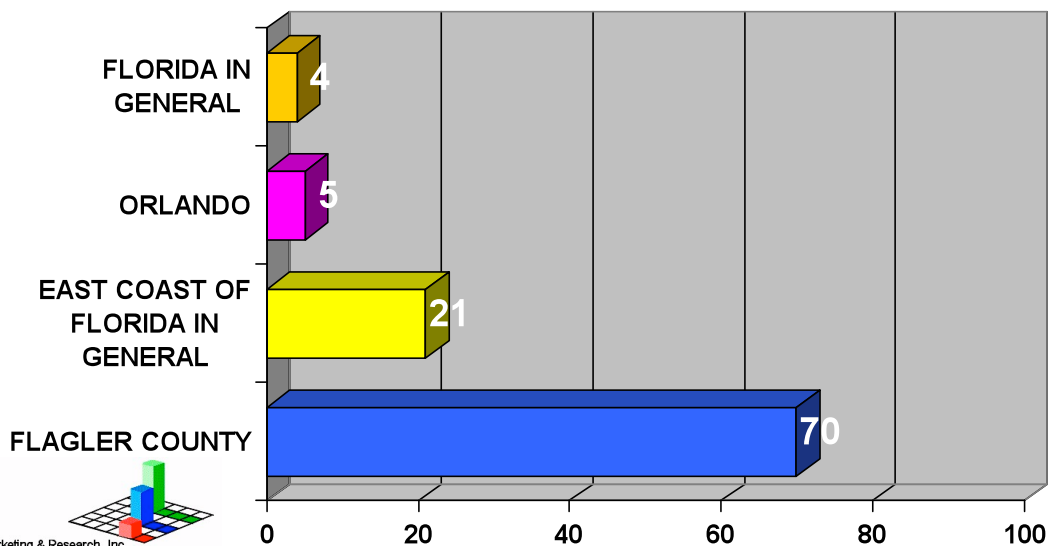


THE MOST CONVENIENT/ONLY TIME OUT OF STATE VISITORS VACATION, IS IN:



- ◆ The average party size for out of state visitors was 3.2.
- ◆ The average party size for out of state visitors 18 and older was 2.6.
- ◆ 15% of out of state visitors traveled with children age 12 and younger.
- ◆ 9% of out of state visitors traveled with teenagers.
- ◆ 37% traveled with friends/relatives; 39% met friends/relatives in Flagler County.
- ◆ Out of state visitors said additional reasons to take a trip are: 18% said government/company business, 6% said convention/trade show, and 6% said to meet a cruise.
- ◆ 28% of out of state visitors traveled by air, and 72% by auto or motorcycle.
- ◆ For those out of state visitors that traveled by air:
 - 13% landed in Daytona Beach.
 - 56% landed in Orlando.
 - 31% landed in Jacksonville.

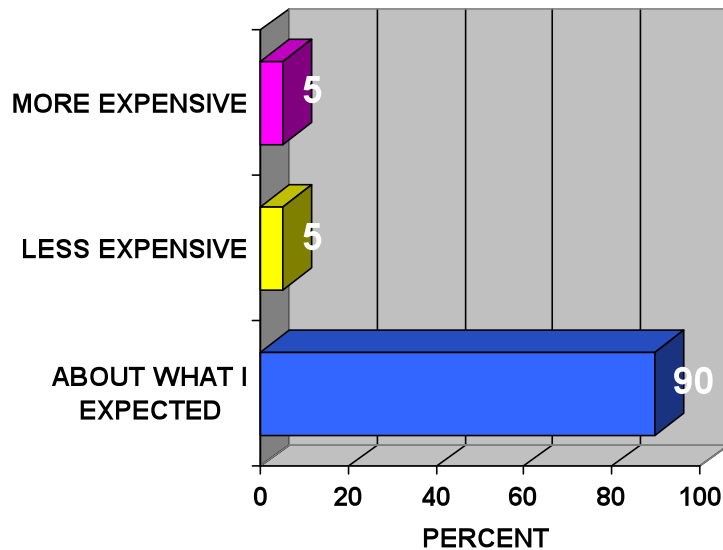
THE MAIN DESTINATION FOR OUT OF STATE VISITORS WAS:



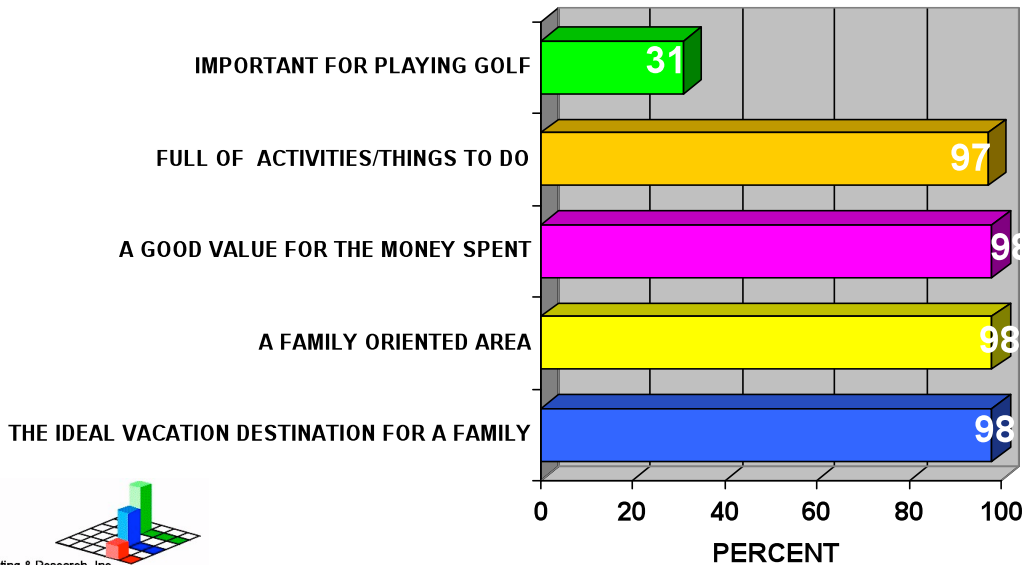
- ◆ The average number of days out of state visitors spent away from home was 9.5.
- ◆ The average number of days spent in Flagler County was 7.5.
- ◆ The average amount of money spent in Flagler County per day, without lodging, by out of state visitors' immediate party was between \$110 and \$120.
- ◆ 60% of the out of state visitors made advanced reservations, with the average time in advance being between 1 to 2 months.
- ◆ 34% of out of state visitors did not use a professional travel service.
 - 53% used an Internet travel service.
 - 11% used a travel agent.
 - 2% used an auto club.

Satisfaction with Flagler County

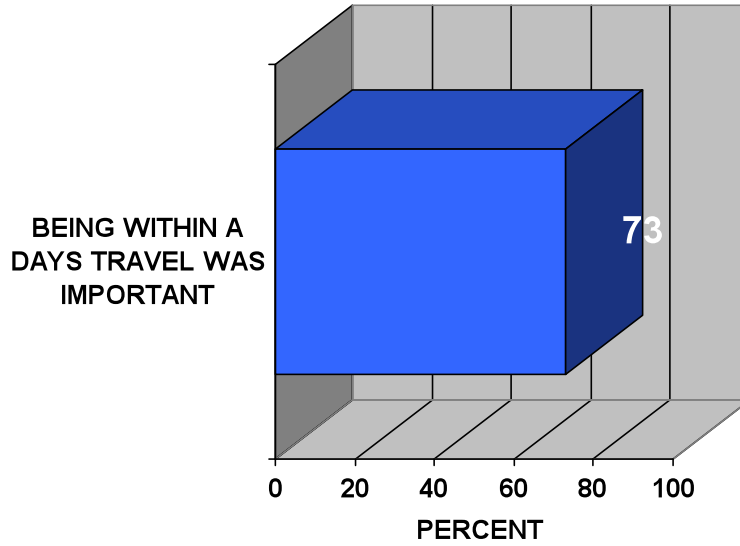
OUT OF STATE VISITORS FOUND FLAGLER COUNTY TO BE:



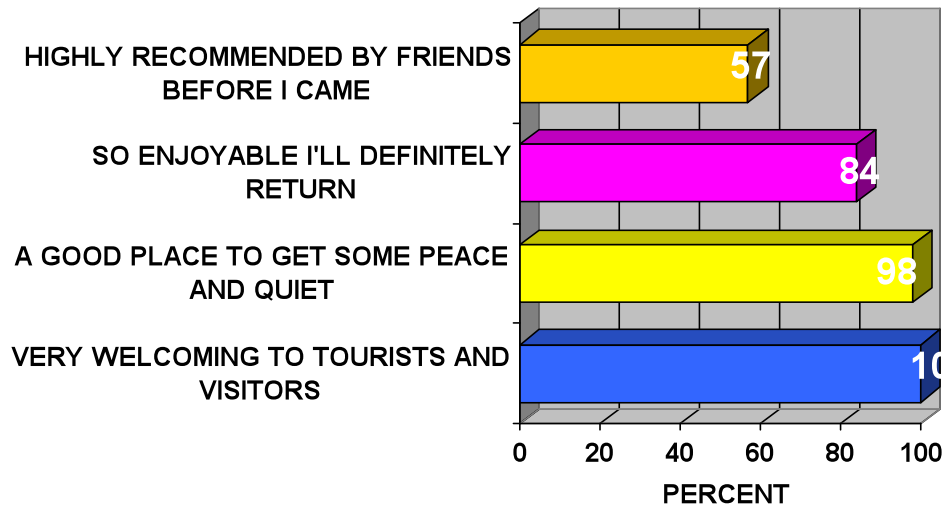
OUT OF STATE VISITORS SAID THAT FLAGLER COUNTY WAS:



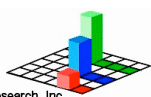
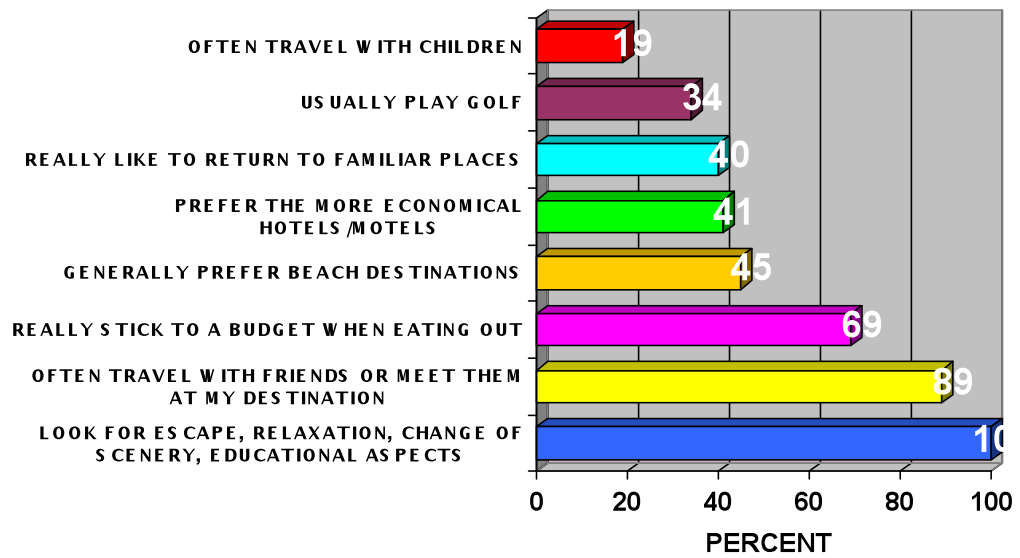
IN DECIDING ON FLAGLER COUNTY, OUT OF STATE VISITORS SAID:



OUT OF STATE VISITORS SAID THAT FLAGLER COUNTY WAS:



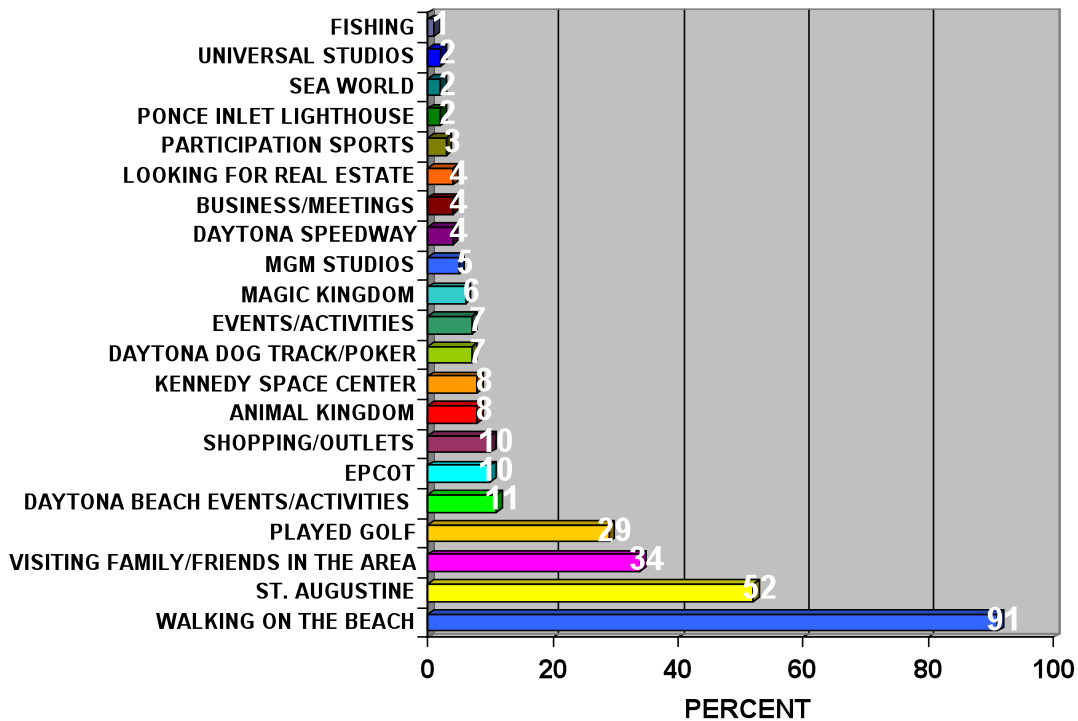
ON PLEASURE TRIPS OUT OF STATE VISITORS:



◆ Magazines received and read by members of out of state visitors' households are:

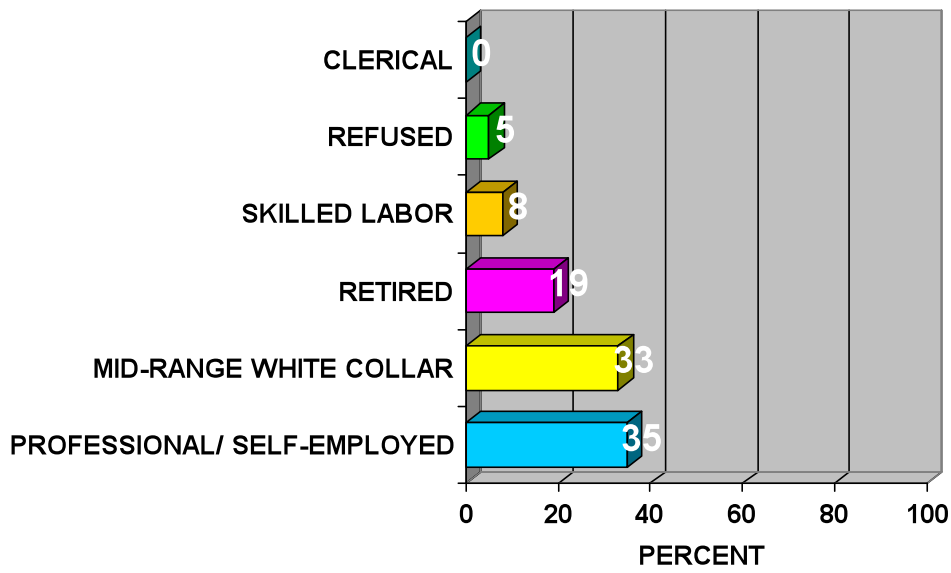
58%	No magazines	4%	Car Magazines - various
18%	AAA Magazine	4%	Car magazines - various
17%	Golf magazines - various	4%	Ladies Home Journal
16%	People Magazine	4%	US News & World Report
14%	Modern Maturity	3%	National Geographic
12%	Southern Living	2%	Good Housekeeping
10%	Sports Illustrated	2%	Various others
8%	Business Week	1%	Bikers magazines
8%	Money Magazine	1%	Country Living
8%	Time	1%	Family Circle
7%	Readers Digest	1%	News Week
5%	Better Homes & Garden	1%	Parenting

ACTIVITIES DONE BY OUT OF STATE VISITORS WERE:



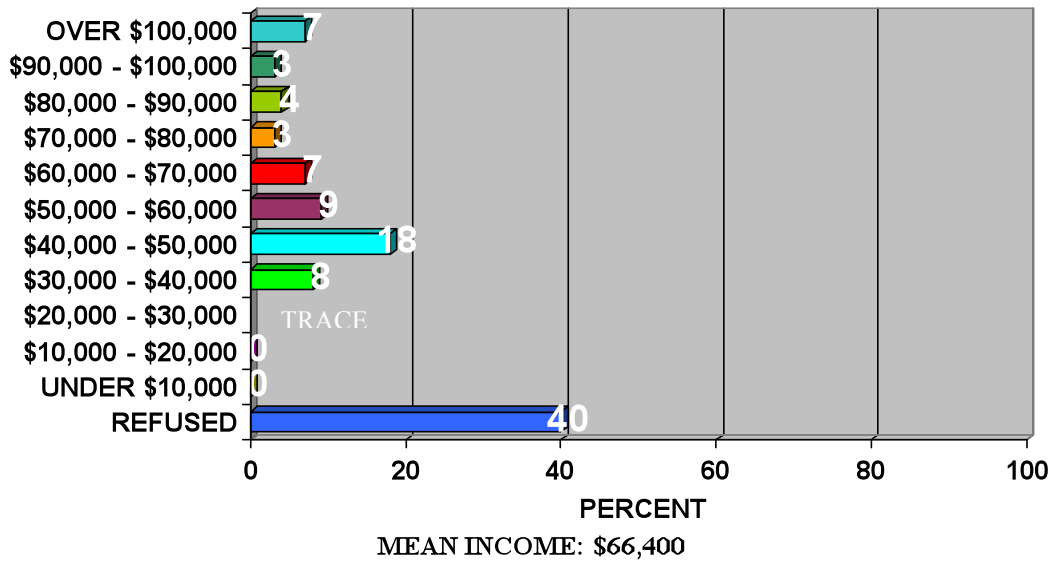
- ◆ 98%* of the out of state visitors would recommend Flagler County to others.
*Those that probably would not recommend Flagler County said; too expensive and beach very disappointing.
- ◆ 57% of the out of state visitors to complete the survey were male, 43% were female.

**OCCUPATION OF THE PRIMARY WAGE EARNER OF
OUT OF STATE VISITORS' HOUSEHOLD IS:**

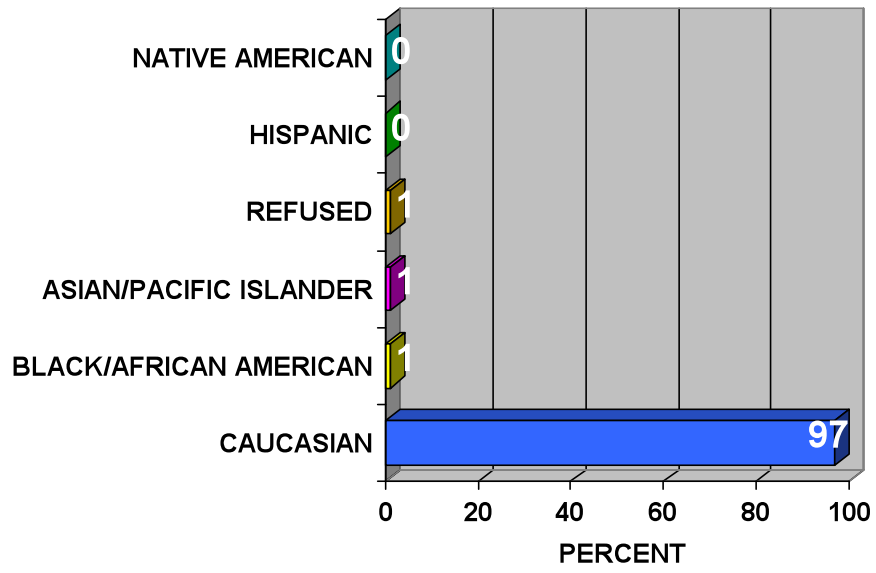


- ◆ Out of state visitors were an average of 54 years old.
- ◆ 79% of out of state visitors were married, and 21% were single.

**OUT OF STATE VISITOR'S ESTIMATED ANNUAL
INCOME FROM ALL SOURCES BEFORE TAXES WAS:**



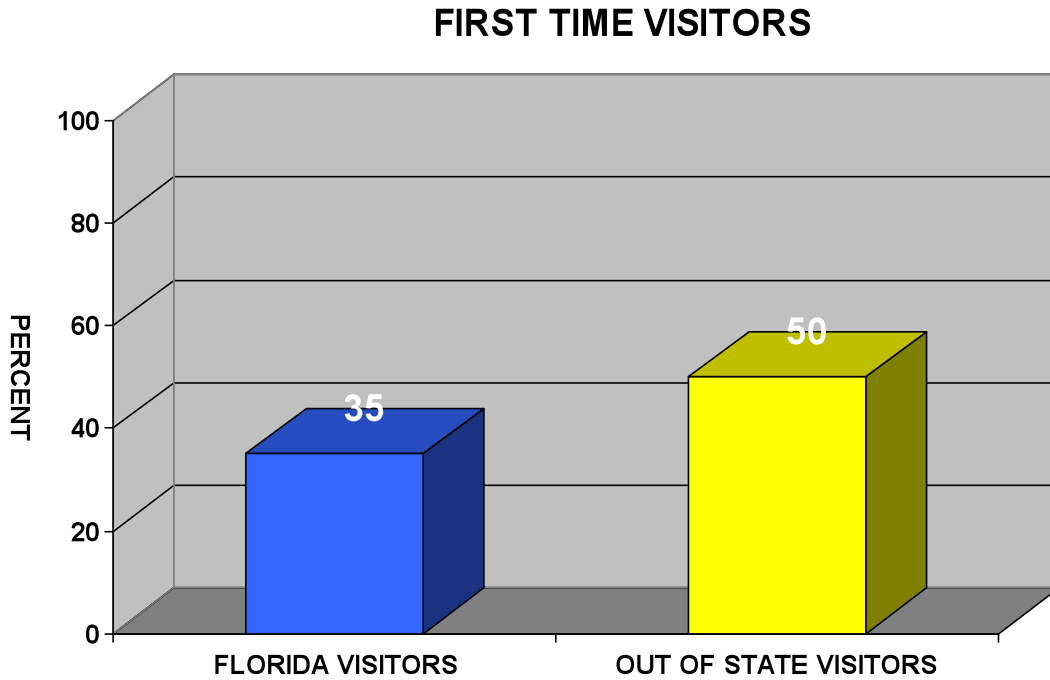
THE RACIAL/ETHNIC GROUP FOR OUT OF STATE VISITORS IS:



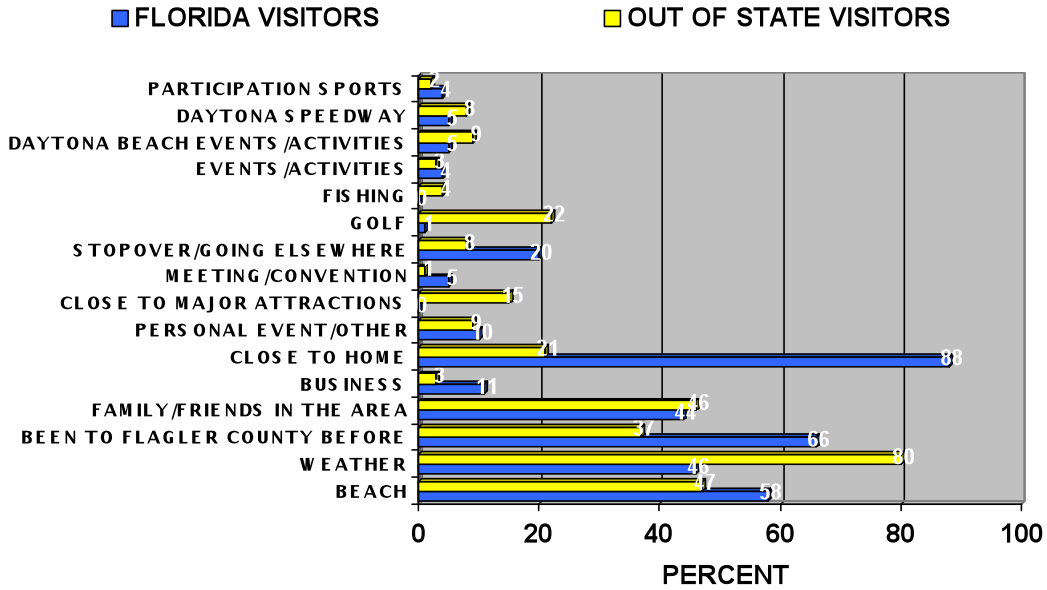
FLORIDA VISITORS

2011 - 2012 Flagler County Visitor Profile

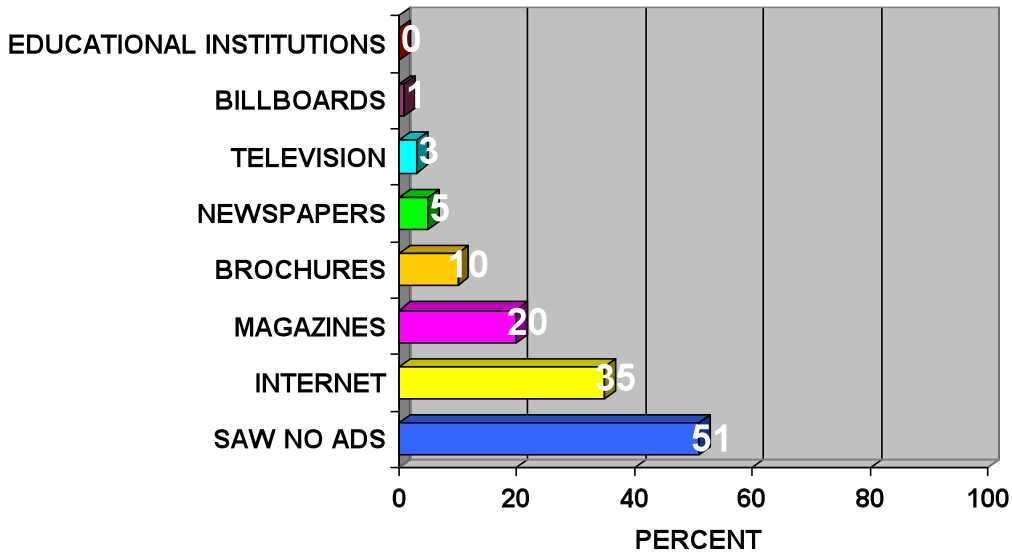
- ◆ For 35% of the visitors from Florida, this last visit was their first ever to the Flagler County.
- ◆ 90% of the repeat visitors from Florida have stayed in the Flagler County Area overnight or longer more than once during the past five years.
- ◆ 60% of the repeat visitors from Florida have stayed in the same lodging before.



REASONS TO CHOOSE FLAGLER COUNTY WERE:

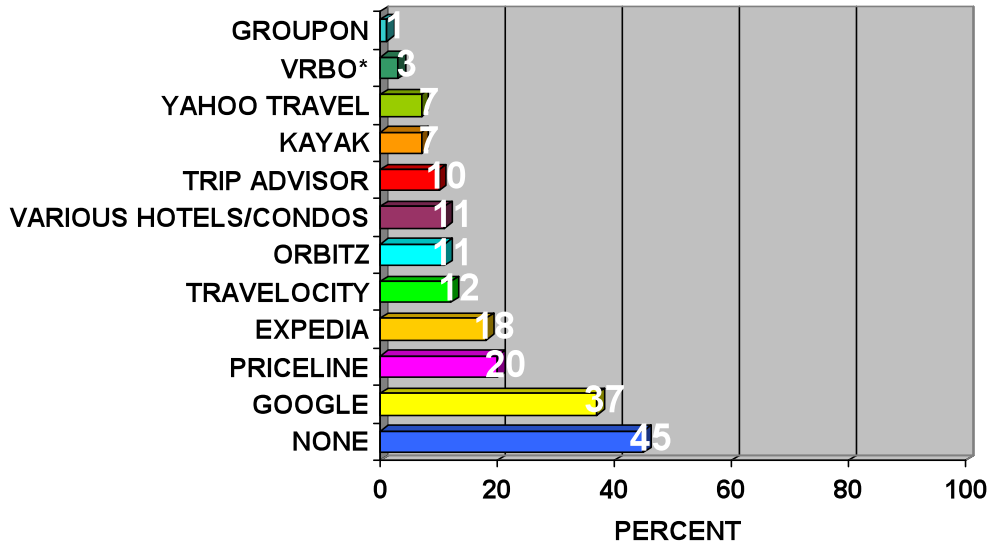


VISITORS FROM FLORIDA REMEMBER SEEING ADS FOR FLAGLER COUNTY IN/ON:



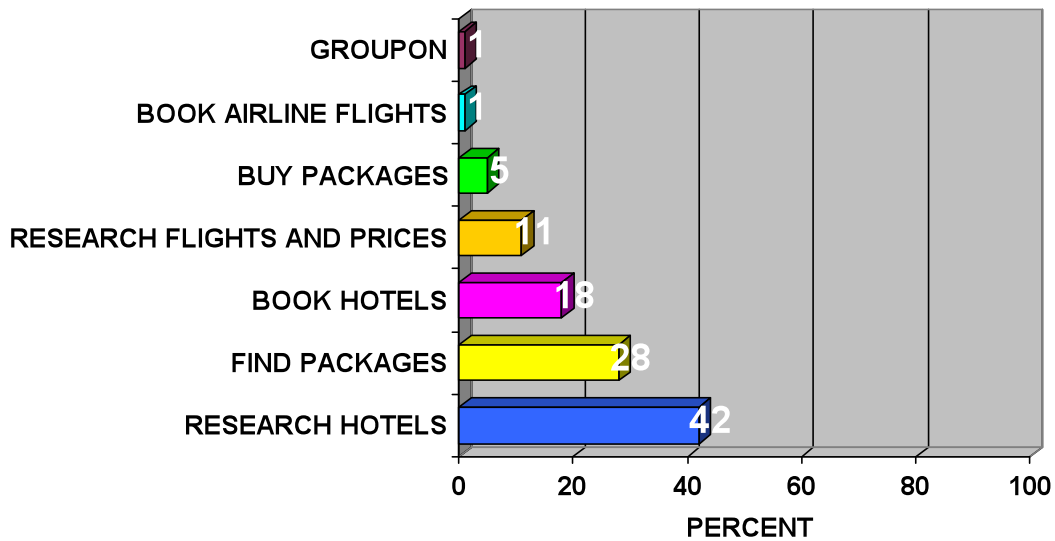
- ◆ 58% of the visitors from Florida asked for information before coming.
- ◆ 44% of the visitors from Florida used the Internet to plan their trip to Flagler County.
- ◆ 39% of the visitors from Florida used the Internet to choose a place to stay.
- ◆ 41% of the visitors from Florida used the Internet to make reservations.
- ◆ 60% of the visitors from Florida used the Internet for other purposes regarding this trip to Flagler County such as:
 - 21% Finding general information about the area.
 - 20% Traveling directions/maps.

TRAVEL WEBSITES USED BY VISITORS FROM FLORIDA:

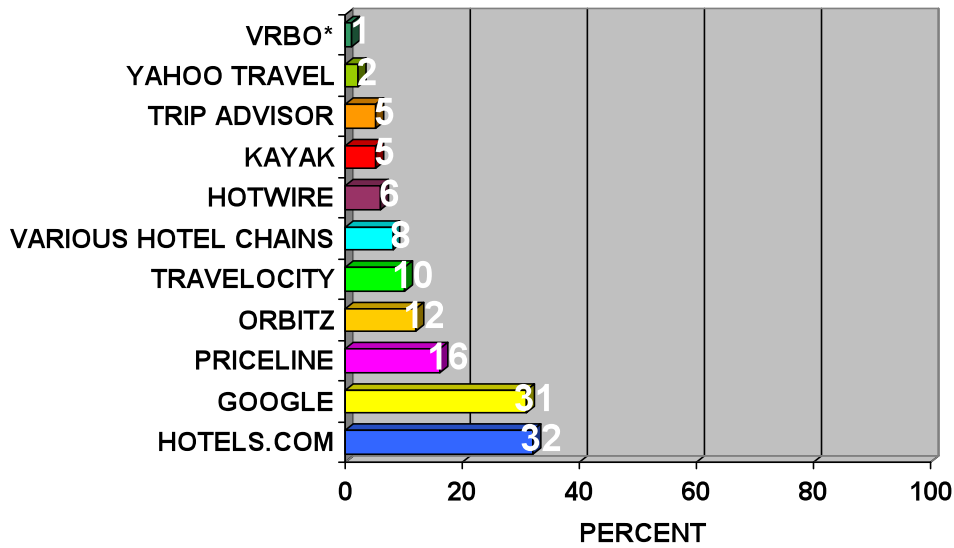


*Vacation Rentals By Owner

VISITORS FROM FLORIDA USE TRAVEL WEBSITES FOR:

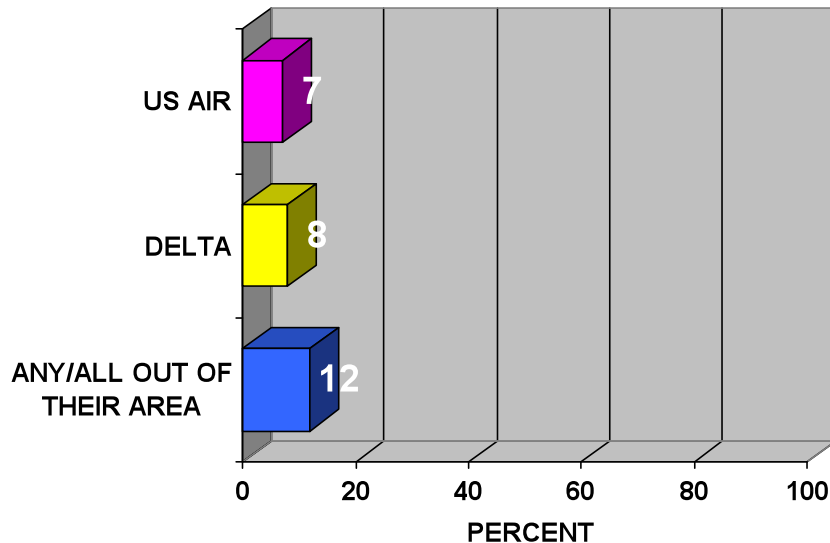


TRAVEL WEBSITES USED BY VISITORS FROM FLORIDA FOR HOTELS:



*Vacation Rentals By Owner

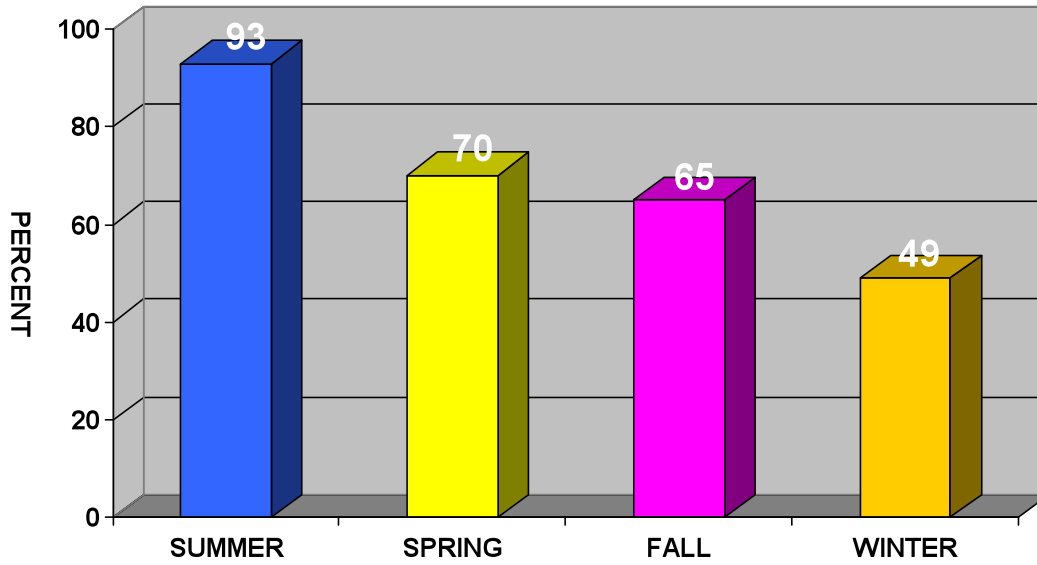
TRAVEL WEBSITES USED BY VISITORS FROM FLORIDA FOR AIRLINES:



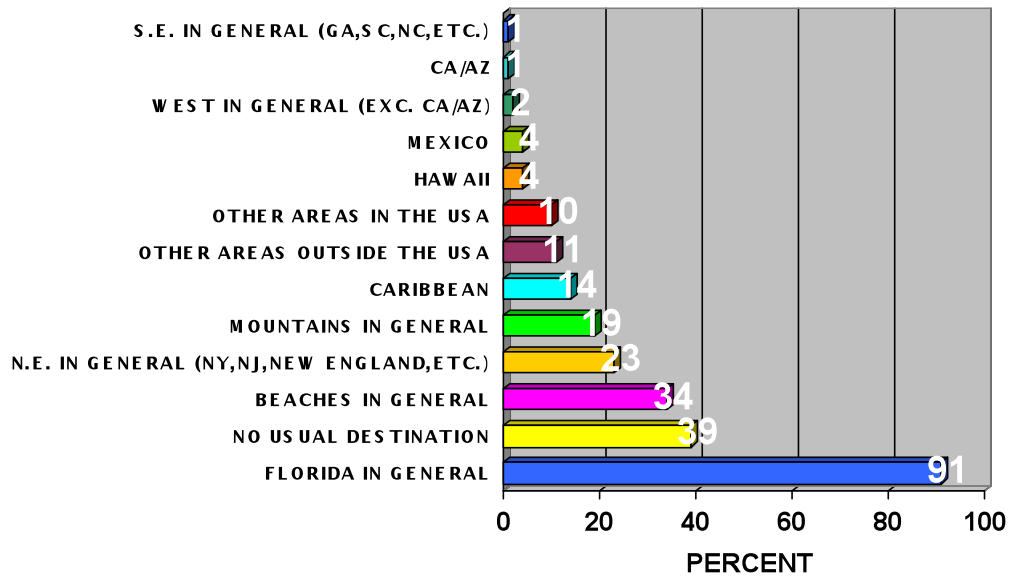
- ◆ 100% of Florida visitors do not use any other websites.
- ◆ 97% of the visitors from Florida are on Facebook.
 - 97% use Facebook to let friends know what is new, 97% to see what is new with their friends, and 80% to talk about activities/vacations.
- ◆ 21% of the visitors from Florida use Twitter.
- ◆ 100% of Florida visitors did not use any other social networking programs.
- ◆ 65% of the visitors from Florida take more than one vacation per year.



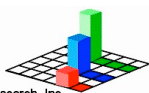
VISITORS FROM FLORIDA WHO TAKE MORE THAN ONE VACATION PER YEAR, GO IN:



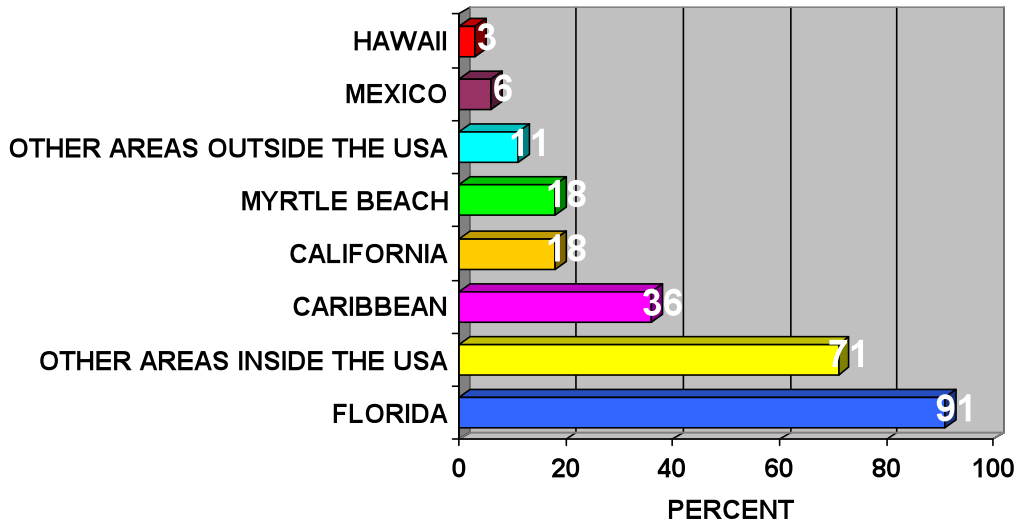
VISITORS FROM FLORIDA WHO TAKE MORE THAN ONE VACATION PER YEAR ALSO VACATION IN:



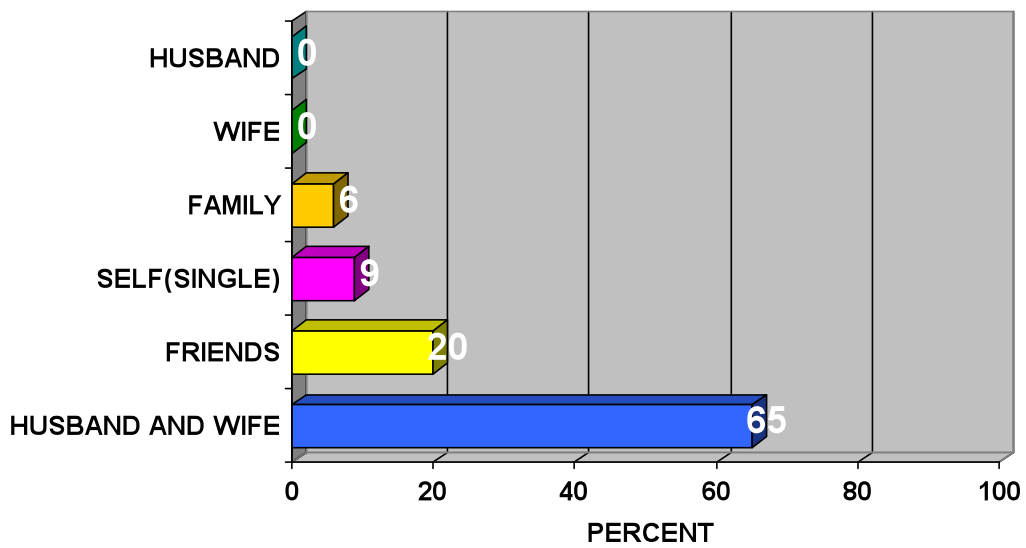
- ◆ 77% of the visitors from Florida have taken another warm weather vacation in the past five years.



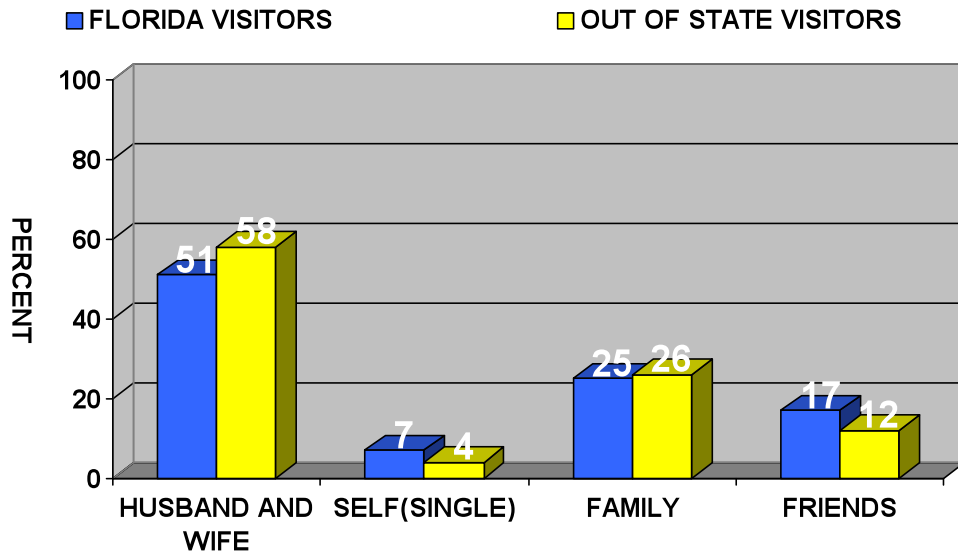
VISITORS FROM FLORIDA WHO HAVE TAKEN ANOTHER WARM WEATHER VACATION IN THE PAST 5 YEARS ALSO VACATION IN:



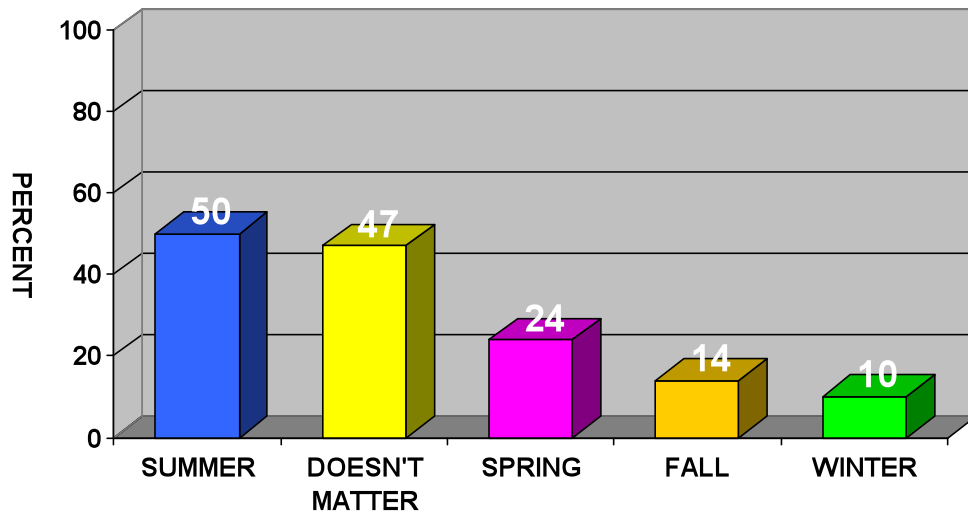
THE DECISION TO VISIT FLAGLER COUNTY FOR VISITORS FROM FLORIDA WAS MADE BY:



VISITORS FROM FLORIDA SAID THEIR VACATION WAS FOR:

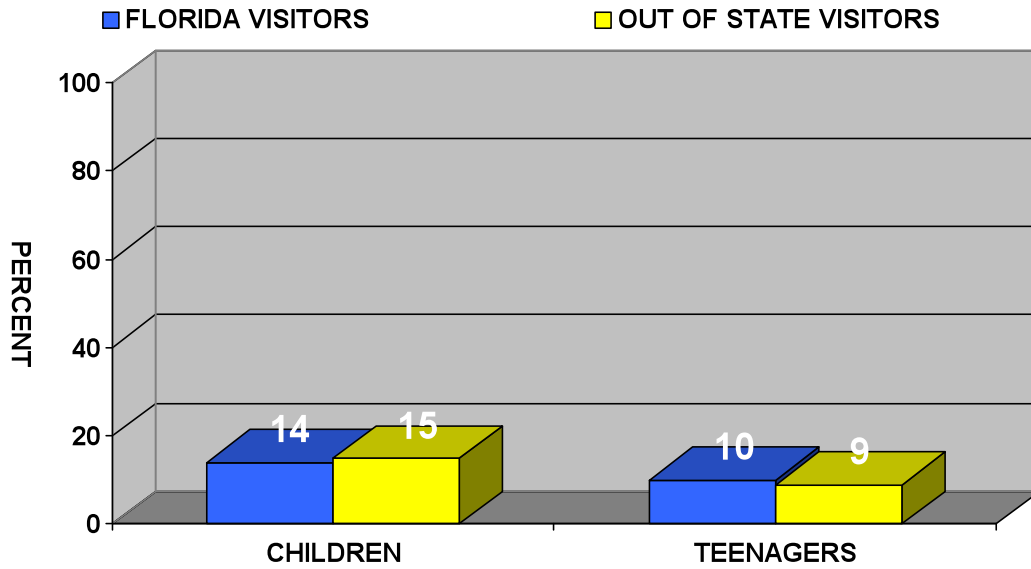


THE MOST CONVENIENT/ONLY TIME VISITORS FROM FLORIDA VACATION, IS IN:



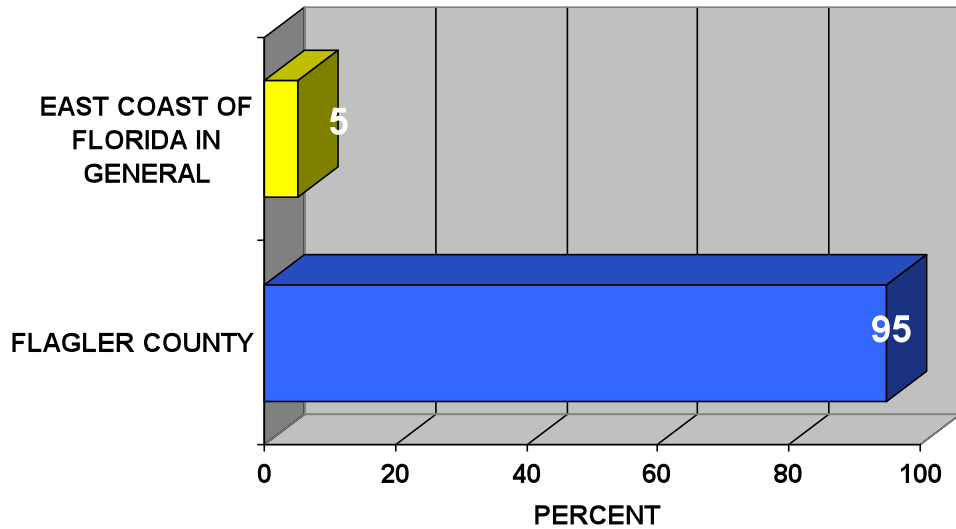
- ◆ The average party size for visitors from Florida was 3.1.
- ◆ The average party size for visitors from Florida 18 and older was 2.6.
- ◆ 14% of the visitors from Florida traveled with children age 12 and younger.
- ◆ 10% of the visitors from Florida traveled with teenagers.

VISITORS THAT TRAVELED WITH CHILDREN AND/OR TEENAGERS WERE:



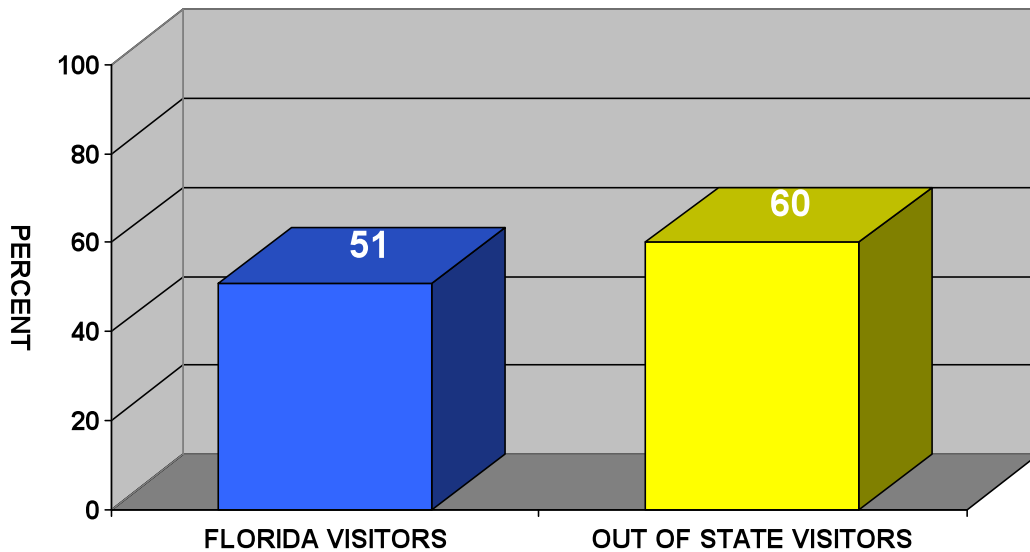
- ◆ 42% traveled with friends/relatives; 32% met friends/relatives in Flagler County.
- ◆ Visitors from Florida said additional reasons to take a trip are: 20% said government/company business, 11% said to meet a cruise, and 4% said convention/trade show.
- ◆ All of the visitors from Florida traveled by auto or motorcycle.

THE MAIN DESTINATION FOR VISITORS FROM FLORIDA WAS:



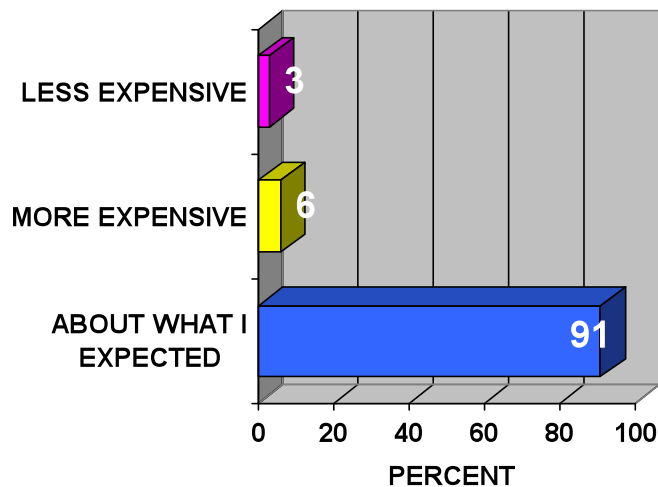
- ◆ The average number of days visitors from Florida spent away from home was 3.0.
- ◆ The average number of days spent in Flagler County was 2.9.
- ◆ The average amount of money spent in Flagler County per day, without lodging, by visitors' from Florida immediate party was between \$90 and \$100.
- ◆ 51% of visitors from Florida made advanced reservations, with the average time in advance being about between 1 and 2 months.
- ◆ 85% of visitors from Florida did not use a professional travel service.
 - 12% used an Internet travel service.
 - 3% used an auto club.

VISITORS WHO MADE ADVANCED RESERVATIONS:

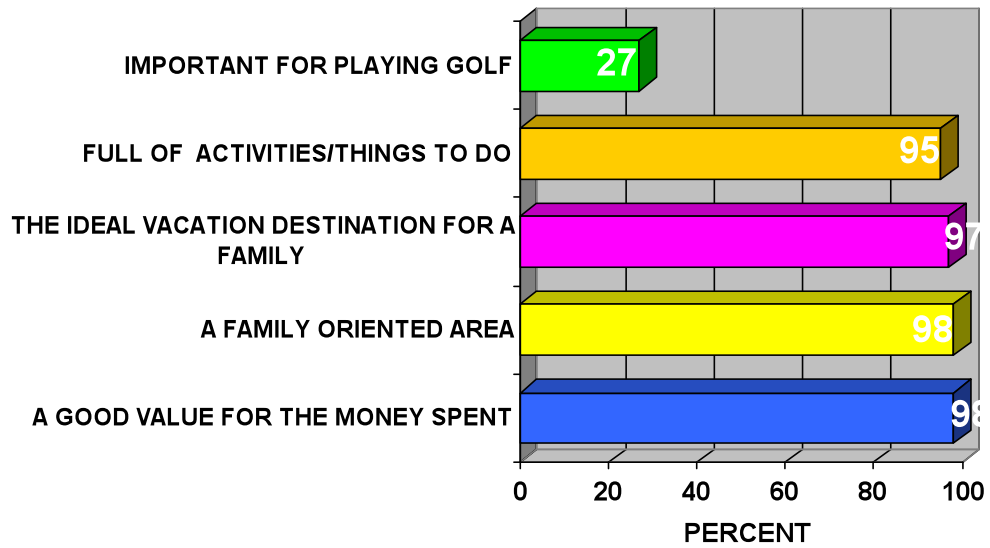


Satisfaction with Flagler County

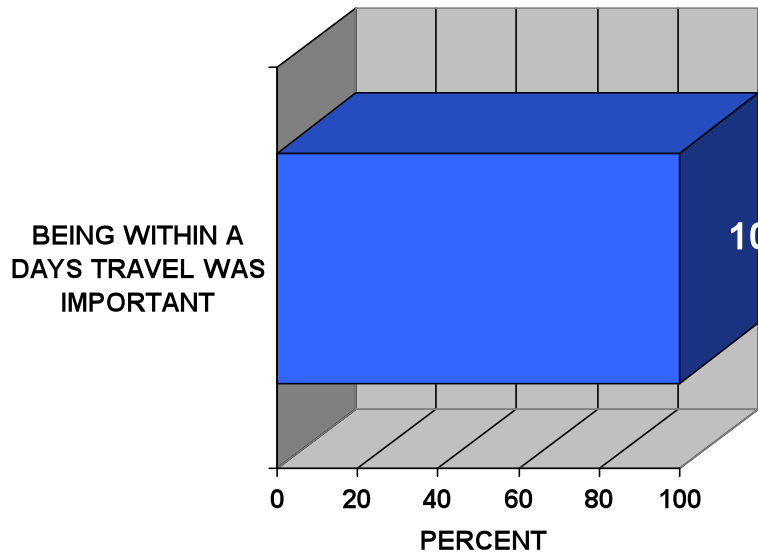
VISITORS FROM FLORIDA FOUND FLAGLER COUNTY TO BE:



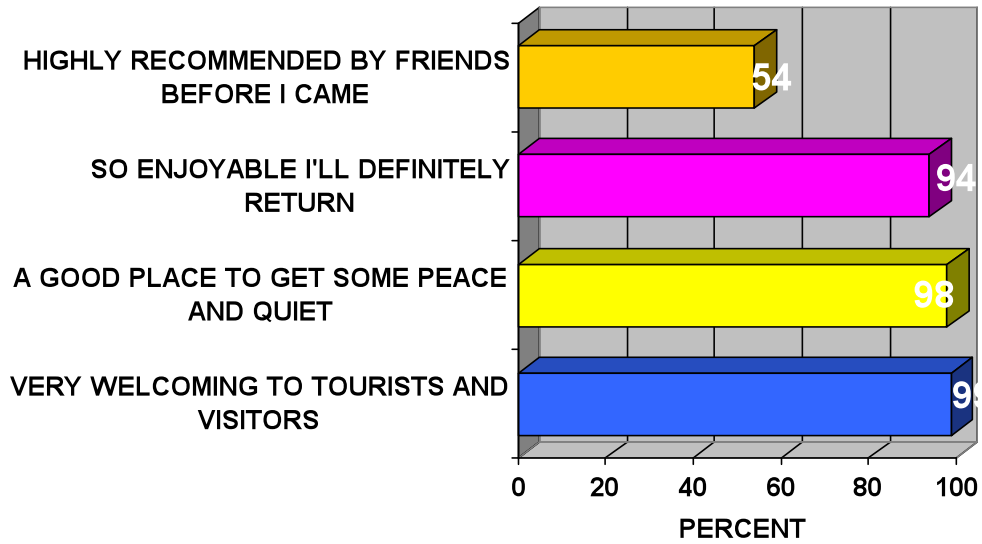
**VISITORS FROM FLORIDA SAID THAT
FLAGLER COUNTY WAS:**



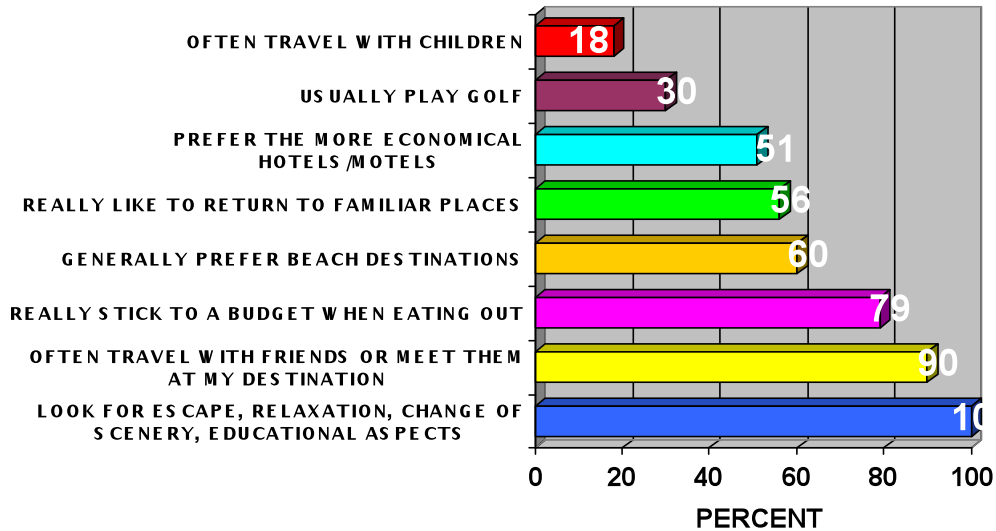
**IN DECIDING ON FLAGLER COUNTY, VISITORS
FROM FLORIDA SAID:**



VISITORS FROM FLORIDA SAID THAT FLAGLER COUNTY WAS:



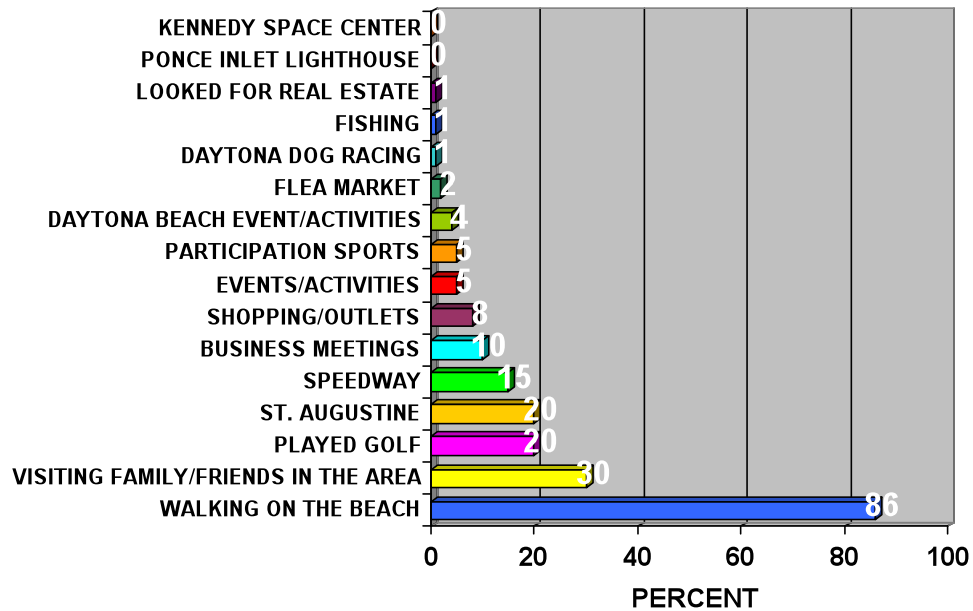
ON PLEASURE TRIPS VISITORS FROM FLORIDA:



◆ Magazines received and read by members of visitors' from Florida households are:

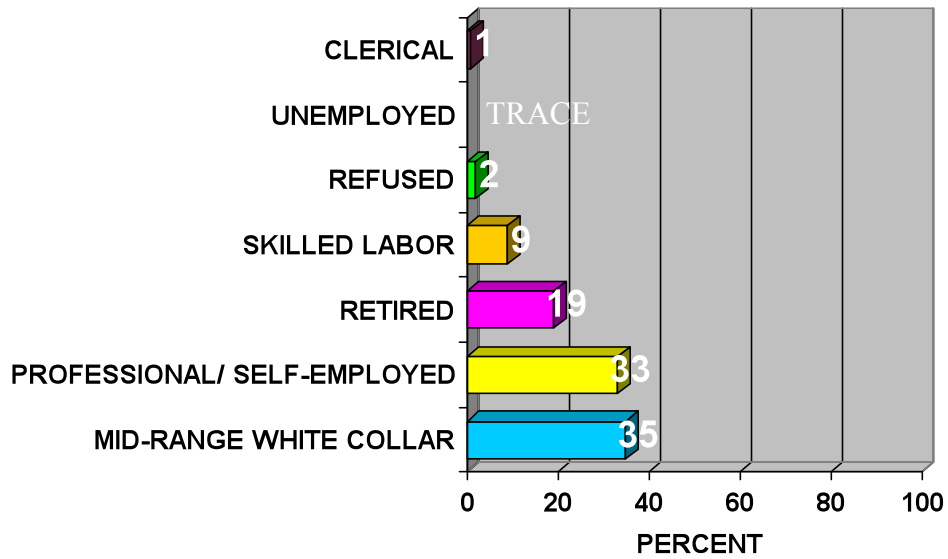
56%	No magazines	2%	Car magazines - various
20%	Southern Living	2%	Cosmopolitan
17%	People Magazine	2%	Good Housekeeping
15%	Golf magazines - various	2%	National Geographic
13%	Modern Maturity	2%	Time
13%	Sports Illustrated	2%	Various others
12%	AAA Magazine	1%	Biker magazines - various
7%	Business Week	1%	Country Living
6%	US News & World Report	1%	Family Circle
5%	Money Magazine	1%	Ladies Home Journal
4%	Readers Digest	1%	News Week
3%	Parenting	1%	TV Guide
2%	Better Homes & Garden		

ACTIVITIES DONE BY VISITORS FROM FLORIDA WERE:



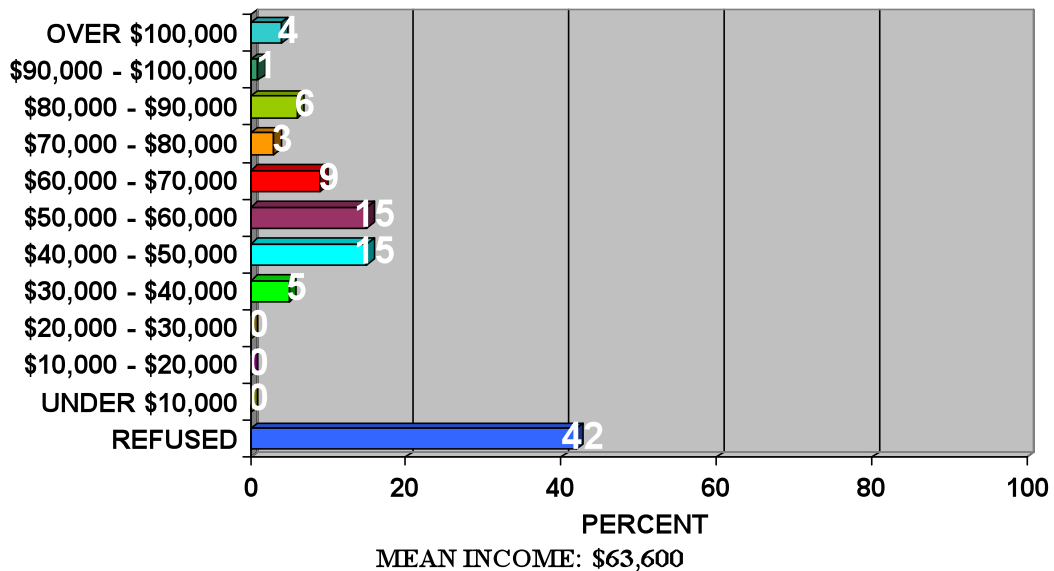
- ◆ 99%* of the visitors from Florida would recommend Flagler County to others.
*Those that said would not recommend Flagler County said: Lodging accommodations disappointing.
- ◆ 50% of the visitors from Florida to complete the survey were female, 50% were male.

OCCUPATION OF THE PRIMARY WAGE EARNER OF VISITORS' FROM FLORIDA HOUSEHOLD IS:

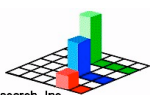
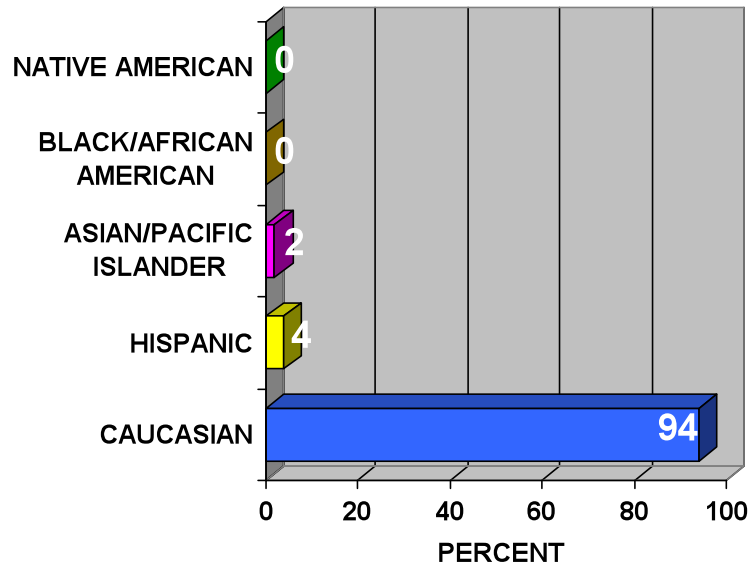


- ◆ Visitors from Florida were an average of 48 years old.
- ◆ 89% of visitors from Florida were married, and 11% were single.

VISITOR'S FROM FLORIDA ESTIMATED ANNUAL INCOME FROM ALL SOURCES BEFORE TAXES WAS:



THE RACIAL/ETHNIC GROUP FOR VISITORS FROM FLORIDA IS:



2011 - 2012 FLAGLER COUNTY POINTS OF ORIGIN

46%	Florida	1%	Massachusetts	Tr.	Missouri
9%	Georgia	1%	Minnesota	Tr.	Montana
4%	New York	1%	Virginia	Tr.	Nebraska
3%	New Jersey	Tr.	Alabama	Tr.	Nevada
3%	North Carolina	Tr.	Alaska	Tr.	New Hampshire
3%	Ohio	Tr.	Arizona	Tr.	New Mexico
2%	Illinois	Tr.	Arkansas	Tr.	North Dakota
2%	Michigan	Tr.	Colorado	Tr.	Oklahoma
2%	Pennsylvania	Tr.	D.C.	Tr.	Oregon
2%	South Carolina	Tr.	Delaware	Tr.	Puerto Rico
2%	Tennessee	Tr.	Hawaii	Tr.	Rhode Island
2%	Texas	Tr.	Idaho	Tr.	South Dakota
1%	California	Tr.	Iowa	Tr.	Utah
1%	Connecticut	Tr.	Kansas	Tr.	Vermont
1%	Indiana	Tr.	Louisiana	Tr.	Washington
1%	Kentucky	Tr.	Maine	Tr.	West Virginia
1%	Maryland	Tr.	Mississippi		

◆ **TOTAL U.S.A. 94%**

◆ **CANADA (4% of the total)**

2%	Ontario	Tr.	Manitoba
1%	Quebec	Tr.	New Brunswick
Tr.	Alberta	Tr.	Nova Scotia
Tr.	British Columbia		

◆ **INTERNATIONAL (2% of the total)**

1%	U.K.	Tr.	Honduras
Tr.	Argentina	Tr.	Iceland
Tr.	Australia	Tr.	India
Tr.	Austria	Tr.	Italy
Tr.	Belgium	Tr.	Norway
Tr.	China	Tr.	Russia
Tr.	Denmark	Tr.	Saudi Arabia
Tr.	Finland	Tr.	Sweden
Tr.	Germany	Tr.	Switzerland



FLORIDA VISITORS

(by % of Florida total)

35%	Orlando, Melbourne
19%	Jacksonville
16%	Tampa, St. Petersburg
10%	Miami, Ft. Lauderdale
9%	West Palm Beach
6%	Gainesville
2%	Ft. Myers, Naples
2%	Tallahassee
Tr.	Pensacola
Tr.	Panama City

