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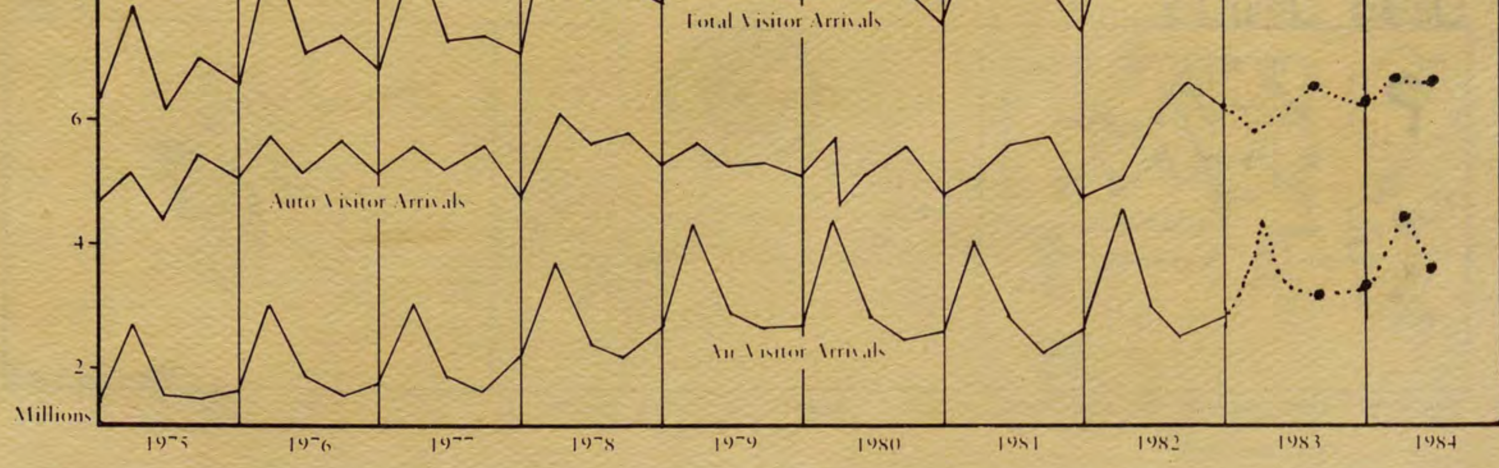
The four quarter ahead forecasts of out-of-state domestic visitor arrivals for the third quarter of 1983 through the second quarter of 1984 are presented in the graph below and also in the table on the following page. Although official first quarter air and auto arrivals, as well as second quarter air and auto arrivals are not yet available, preliminary figures generated by the BAROMETER suggest that total out-of-state arrivals for the first half of 1983 were approximately 10 percent ahead of 1982.

Normally, the first quarter of each year is the strongest period for air arrivals, however, tourist arrivals by air have proved unremitting due to a longer than anticipated emphasis on fare cutting by the major airlines. As a consequence, out-of-state visitor arrivals by air for both the third and fourth quarters of 1983 are now expected to exceed the actual figures of corresponding 1982 periods by margins of 28.7 and 14.2 percent respectively. Additionally, some major airlines, which only recently (within the last 18 months) have added Florida destinations to their schedules, have been very persistent in pursuing the tourist market with cut-rate fares and a large variety of package deals. Moreover, a continued scramble for market share by these airlines is also resulting in an enormous amount of "destination" advertising. It is anticipated that the promotional efforts of these competing airlines will help to accelerate the growth in tourist arrivals, especially to Florida, in upcoming quarters.

Overall, tourism development has been rather impervious to the ravages of the economy. Now, with good prospects of a sustained general economic recovery on the horizon, one might expect that with airline prices returning to normal cost and target profit recovery levels, the growth will be sustained.

With these brighter prospects for the future, numbers of out-of-state arrivals by auto are predicted to increase by 3.2 percent over the course of quarter three while decreasing only slightly during quarter four, relative to the same 1982 periods. The slight downward revision of 1 percent from the previous Spring forecast is chiefly due to the absence of the combined effects of several factors which served to build the consumer confidence displayed during the extraordinarily strong fourth quarter of 1982. The fortunate synergy that had developed between consumer readiness, media stimulation, the opening of EPCOT, and the low cost of travel will in all likelihood not be repeated; at least not in the magnitude that was then present. Also, as shared previously in the Spring 1983 issue of the BAROMETER, the favorable weather conditions that prevailed throughout last fall-winter, affording tourists the option of driving, are not expected to recur. Still, further stabilization of gasoline prices in recent months has also bode well for auto arrivals. Yearly totals for 1983 should be very

OUT-of-STATE VISITOR ARRIVALS



Out of State Visitor Arrivals-Quarterly
1983-III through 1984-II
(millions)

Series	1983-III	% Change from 1982-III	1983-IV	% Change from 1982-IV	1984-I	% Change from 1983-I	1984-II	% Change from 1983-II
Auto	6.370	+3.2	5.991	−1.0	6.334	NA	6.215	NA
Air	3.101	+27.8	3.171	+14.2	4.677	NA	3.408	NA
Total	9.471	+10.2	9.162	+3.8	11.011	NA	9.623	NA

NA - Not Available

healthy and further improvements in the availability of consumer credit through the first half of 1984 should allow for steady (albeit unspectacular) growth in auto arrivals. Accordingly, revised estimates of out-of-state auto arrivals the first and second quarters of 1984 continue to reflect the optimism of an economic restoration.

On the international scene, the U.S. dollar may decline a bit due to a spreading international economic recovery. As a result, the Canadian dollar and the British pound would benefit in the last quarter of 1983 and the first quarter of 1984, providing some added input to air arrivals on indirect trips from other points within the United States. This would perhaps provide a welcomed boost in foreign visitors from these markets, since the strength of the U.S. dollar has recently made vacations from these countries to the U.S. more expensive.

Comparatively speaking, 1983 looks to be an exceptionally good year, as evidenced by the continued surge in tourist arrivals which began in the latter part of the fourth quarter of 1982. Although nationally the economic recovery is still considered by many as fragile, with the assumption of slowly decreasing employment rates, continued high promotional activities, and a perceived economic restoration spurred by fixed tax cuts, the BAROMETER forecasts for the next four quarters are optimistic indeed. Given an improving economy, the first half of 1984 also holds much promise for increased tourist activity. Barring a reversal of the general economic trend toward recovery, the Florida visitor industry may look forward optimistically to the next four quarters.

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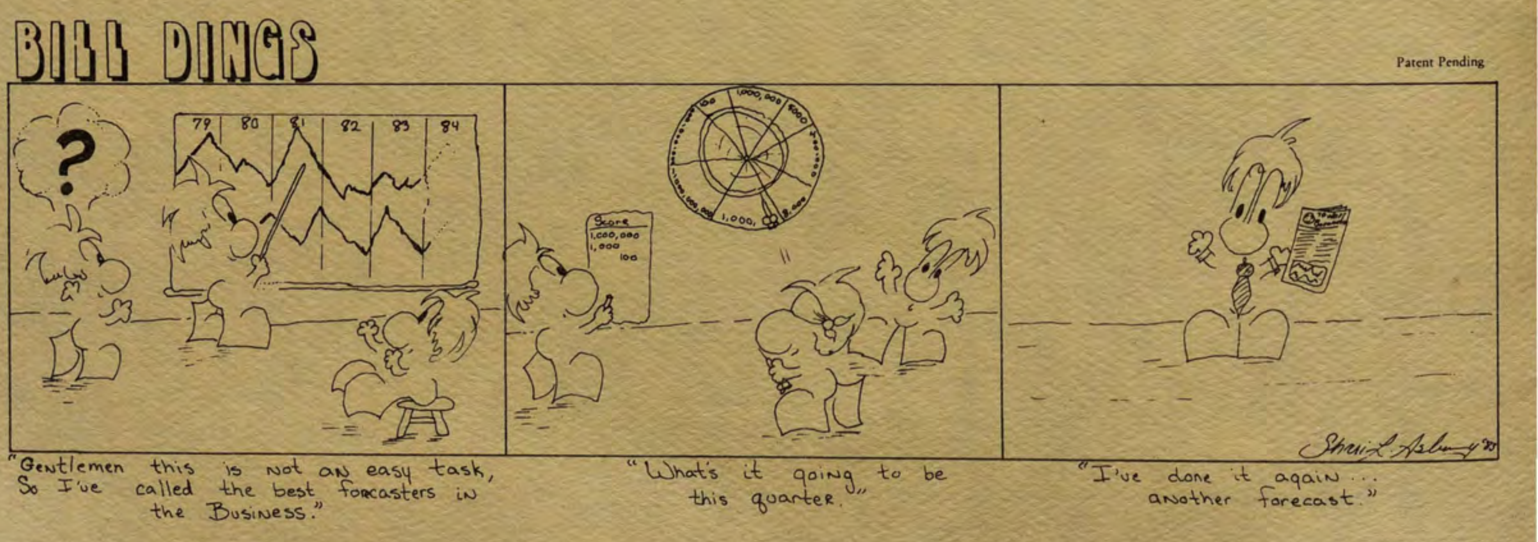


Special Young Adult Issue

This issue of the TOURISM BAROMETER is the result of a study that was commissioned by the Florida Division of Tourism through a S.T.A.R. grant to the Dick Pope, Sr. Institute for Tourism Studies at the University of Central Florida. The principle investigators for the study were Drs. LeRoy Franklin and Linda Malone of the Department of Statistics. The study was an investigation into the travel patterns to Florida of the 18-to-35-year old age group and was concerned with several definite objectives. First, it attempted to determine their past travel habits and future intended travel plans to Florida. Second, it sought to determine what activities and factors were important in determining the destination of their vacation. Third, it also tried to determine the influential medium used in their decision-making process when choosing a destination for their vacation. Fourth, it sought to determine for these previous objectives, if there were any significant differences based on geographical region or marital-family status.

The complete investigation consisted of three separate facets. The first was a survey of travel agencies located east of the Mississippi River conducted in the fall of 1982. The second phase was a survey of Masters of Business Administration students conducted in the spring of 1982 at two schools (one in the Midwest and the other in the East). The third phase was a survey conducted in the summer of 1982 at three out-of-state airport areas; the Washington D.C. area, the New York-New Jersey area, and the Chicago area. The general survey format and content was tested extensively at in-state airports and car stations before execution of the actural out-of-state surveys.

The results of this comprehensive study should be of interest to all travel and tourism planners concerned with the Florida market. As a result, the following pages are dedicated to presenting a digest of this investigation. We truly thank the Florida Division of Tourism for allowing us to reprint this digest. A full presentation of the results of this study is available from the Florida Division of Tourism. *

SURVEY OF TRAVEL AGENTS

Brief Summary of Methodology and Results

A total of 1,800 questionnaires were sent to travel agents east of the Mississippi River. These agencies were obtained by a systematic sample (every 6th agency) from a master list of IATA and ATC travel agencies provided by a national publishing company. There were 146 respondents who were classified by zip codes into three geographic regions; Northeast, Southeast (outside of Florida), and Midwest regions (please see map). Further, the agencies were classified according to whether their sales volume was over or under $1,000,000. The travel agents who responded to the survey had been in business an average of 13.9 years while the agencies they worked for had been in existence an average of 15.7 years.

Overall, pleasure travel constituted 60.7% of all travel agency volume and of this travel, approximately 27% was for the under-35 age clients. Of the entire under-35 age group, less than half (49.1) had decided on a specific location when they first approached the travel agency. For those clients under 35 who had definitely decided on a vacation destination before visiting the travel agent, an average of 42% had chosen Florida. The smallest percentage of travel agents recommending a Florida vacation to travelers undecided on a definite destination was 40.3%.

When asked about specific vacation characteristics of Florida, the travel agents rated most characteristics favorably. The four characteristics of Florida that rated highest were "attractions are quite nice," "the availability of flights to Florida is good," "climate is pleasant," and "vacation is a good value for the money." However, some of the most important information obtained was the relatively large percentage of "don't know" responses to items by the travel agents. The average percentage of "don't know" responses for various Florida vacation characteristics were:

Average % That Don't Know	Vacation Characteristic
49.7%	State Parks are Adequate
40.6%	Local Transportation Good
25.7%	Residents are Courteous
23.4%	Safe Location to Visit
19.9%	Fine Restaurants
16.8%	Youth Oriented Vacation
16.1%	Beaches Good
15.0%	Excellent Honeymoon Vacation
13.2%	Exciting Vacation Area
10.1%	Vacation is Good Value for Money
7.3%	Hotels Satisfactory
7.0%	Vacation Cost Reasonable
3.6%	Climate is Pleasant
1.2%	Availability of Flights to Florida Good
.8%	Attractions Nice.

Whenever a characteristic appeared to be rated relatively low by the travel agents, it was usually the percentage of "don't know" responses that was mainly responsible for lowering the overall rating.

Travel agents within the three regions were also questioned as to their ideas about which clients under 35 years of age were most likely to enjoy a Florida vacation. The most favorable client category recommended for a Florida vacation was a couple with children who have from $300 to $700 per adult to spend, and have from 5 to 7 days allotted for their vacation. Again, perhaps the most significant results were the large percentage of "don't know" responses for the classifications:

Average Percentage That Don't Know	Florida Is A Good Destination For Those Clients Under 35 Who:
19.8%	Are single
11.1%	Have over a week to vacation
10.2%	Are a couple without children
8.6%	Want to spend from $300 to $700 per adult
8.1%	Want to spend less than $300 per adult
6.9%	Want to spend over $700 per adult
4.5%	Have four or less days to vacation
4.3%	Have from five to seven days to vacation
3.6%	Are a couple with children.

Conclusions and Implications

It seems Florida is generally doing quite well in presenting an image to travel agents and travelers as a desirable travel destination. Travel agents agree that for couples with children in the under-35 age group, Florida is a good place to visit. The figures for those under 35 who are single or couples with no children are affected considerably by the large percentage of "don't know" responses. Of the agencies from both sales volume categories 10.1% to 20.6% responded "don't know" to whether Florida was a good vacation spot for singles or for couples without children. Also, from 7.3% to 24% of the agencies from all three regions responded "don't know" to whether Florida was a good vacation spot for singles or for couples without children.

Furthermore, it seems almost incredible that large percentages of "don't knows" were obtained for questions about Florida's desirable vacation characteristics. Five questions had at least 20% of the responses as "don't know." These questions and their percentages of "don't know" responses were (by region):

		N.E.	M.W.	S.E.
1.	Florida has adequate state parks.	48.7%	43.5%	54.8%
2.	Local transportation is good.	28.9%	47.8%	45.2%
3.	Florida is a safe location to visit.	25.0%	26.1%	19.0%
4.	Florida residents are courteous.	23.7%	21.7%	31.7%
5.	Florida has a collection of fine restaurants.	23.7%	21.7%	14.3%

Hence, all three regions have a particularly great need for information on state parks. The midwestern and southeastern regions also have an equally great need for additional information on local transportation facilities. Furthermore, it was interesting to note that significant levels of "don't know" responses were obtained for such characteristics as the quality of beaches. While overall Florida gets relatively good ratings on most characteristics, approximately 66% of the characteristics surveyed had their ratings lowered considerably by the large percentage of "don't know" responses. This was true for all regional and sales volume categories of travel agencies.

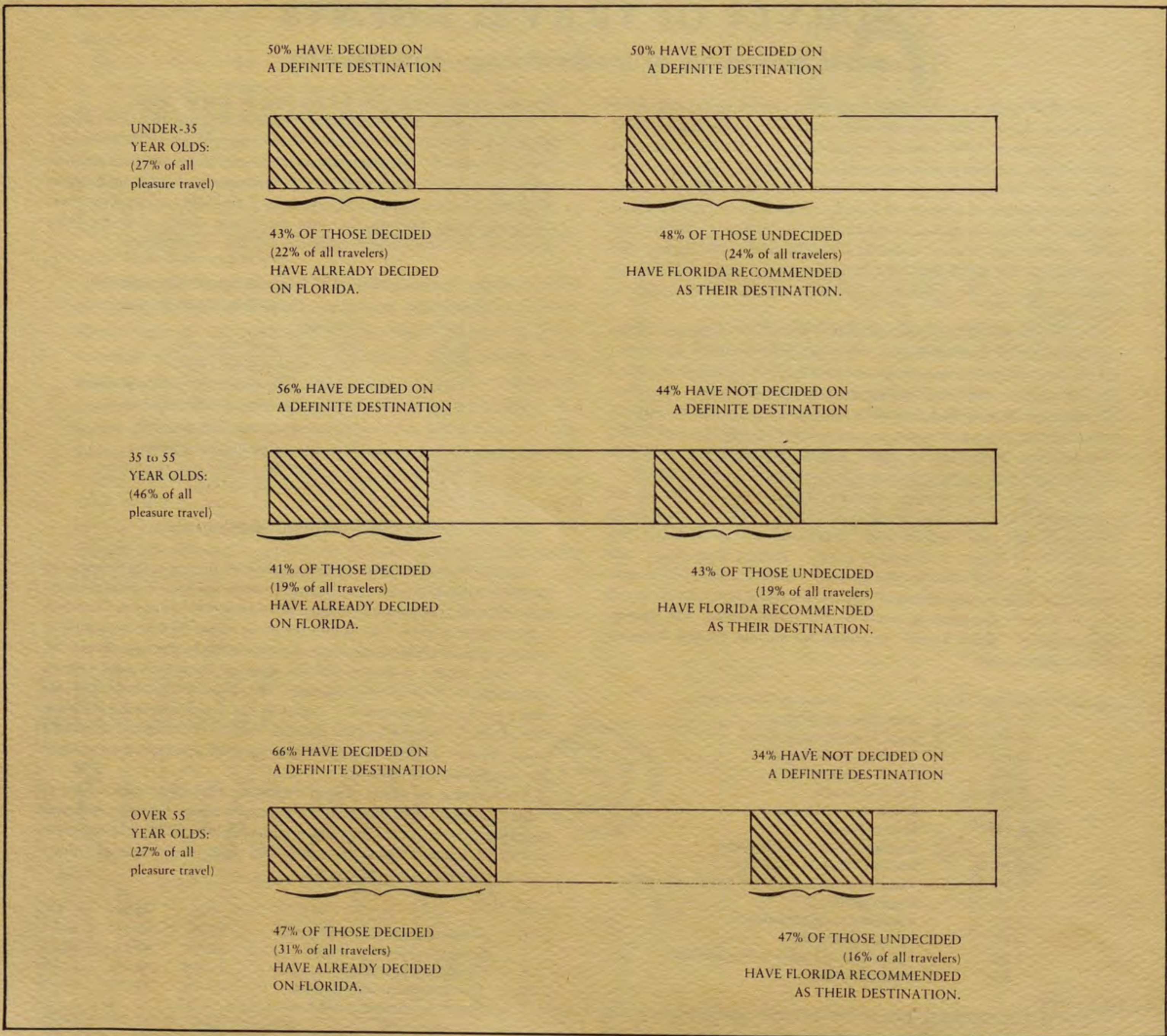
It appears evident that much more fundamental information is needed by travel agencies of all regions and sales volume. It is respectfully suggested that Florida review its role and methods in providing information to travel agents. It seems that travel agencies want a larger quantity of clearer, more timely information on Florida's vacation characteristics. The development of more effective methods of providing this information should be considered.

At the risk of over simplification, the following bar graph displays Florida's market share distribution of travelers utilizing travel agencies in some capacity as perceived by travel agencies in this survey:

Florida is enjoying good standing with all age groups. However, it seems particularly important to provide information to travel agencies on activities and characteristics of Florida that have been found to appeal to the under-35 year olds. These characteristics include beaches, sunshine, national or state parks, historical sites and camping facilities to name only a few. The results of this study seem to show the under-35 age group is the most "undecided on destination choice" of all the groups and therefore the most open to a travel agent's suggestion.

It is also suggested that further research be directed toward discovering why travel agents do not seem to perceive Florida as an excellent honeymoon location. This market area essentially involves the under-35 age group. Furthermore, considering the importance of a "previous trip" in a traveler's selection of destination (a finding of the airport surveys), it would seem reasonable that a positive honeymoon vacation in Florida could potentially lead to a frequent return visit.

Travel agents seem to be very concerned by all the bad publicity Florida receives concerning drugs, crime, immigrant unrest, etc. Of course safety is of prime concern on a vacation, and this problem is certainly no surprise. Nevertheless, efforts need to be made to contain these problems and then to publicize their containment. In addition, it is



suggested that there is a need to emphasize to the travel agencies that these problems are lacking in most areas of Florida.

Florida, as seen by the travel agents, really has no serious competitors except for the sunny vacation spots in the Caribbean and Bermuda. It is suggested that an emphasis on the quality of our beaches, climate, and restaurants (characteristics with which many of the agents were unfamiliar) combined with some reasonably priced package arrangements to beach locations would serve to penetrate the Caribbean market share. Within the United States, Hawaii, California, North and South Carolina, and Virginia were considered only mildly competitive, with Mexico rated as a competitor by 7.9% of the agents. The following table presents Florida's main competitors.

MAIN COMPETITORS TO FLORIDA AS A PLEASURE DESTINATION FOR CLIENTS UNDER 35 YEARS OF AGE

Caribbean, Bermuda & Cruises	53.1%
California	8.6%
Hawaii	7.9%
Mexico	7.9%
North & South Carolina & Virginia	5.5%
Europe	3.2%
Colorado & Mountains	1.3%
New York	1.0%
Canada	.6%
Other USA	10.9%
Other Foreign Travel	0.0%

In the opinion of travel agents, it seems that Florida is a desirable destination in most respects. The largest single problem seems to be a lack of information by the agents on some of Florida's assets. The other problem of consquence is the bad publicity Florida has experienced concerning drugs, crime, and immigration problems, aspects of tourism recommended by 10.8% of the travel agents surveyed as needing improvement.

MAP OF THE GEOGRAPHICAL LOCATIONS OF THE THREE AREA DIVISIONS FOR THE TRAVEL AGENCIES

SURVEY OF M.B.A. STUDENTS

Brief Summary of Methodology and Results

An investigation of young adult travel patterns was undertaken utilizing M.B.A. students at two large schools, one in the Midwest and the other in the East. Since a high percentage of the students were already fully employed, it was felt that such students, being affluent, mobile, and educated, would provide valuable information concerning attitudes toward Florida in particular and travel patterns in general.

The Eastern school had 69.9% of the respondents stating that they had been to Florida in comparison to 94.4% of the respondents from the Midwestern school. Of the Eastern school respondents, 35.5% had been to Florida in the last two years in comparison to 44.4% of the respondents from the Midwestern school.

When asked if they intended to go to Florida in the next two years, 27.7% of the respondents from the Eastern school said "very likely." From the Midwestern school the percent responding "very likely" was 38.9%. Thus, both in the distant and recent past, Florida has had a higher percentage of travelers coming from the Midwestern student respondents than from the Eastern student respondents. Also, this behavior pattern seems to indicate that future travel patterns to Florida will most likely be similiar.

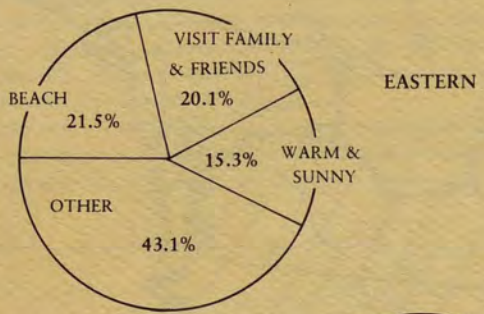
The Eastern M.B.A. respondents tended to stay primarily with friends and relatives on their most recent trip and secondarily in motels and hotels. In contrast, the Midwestern M.B.A. students tended to stay primarily in motels and hotels and secondarily with family and friends. The percentages for both areas are shown in the following table.

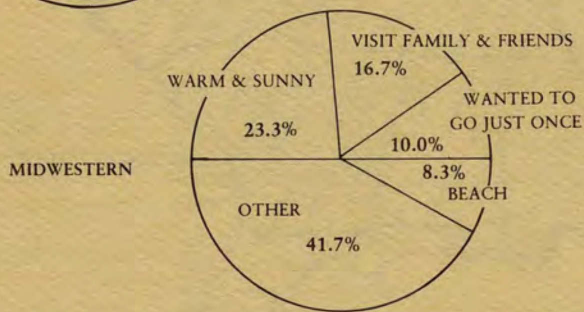
MAIN TYPE OF LODGING USED ON THE LAST NON-BUSINESS TRIP

	Friends/Relatives	Hotels/Motels	Other
Eastern	40.4%	38.3%	21.3%
Midwestern	19.4%	63.9%	16.7%

The three most influential factors determining the destination of the last vacation for the Eastern students were "we wanted to go to the beach," "we wanted to visit friends and family," and "we wanted to go someplace warm and sunny." For the Midwestern M.B.A. respondents, the three most influential factors were "we wanted to go someplace warm and sunny," "we wanted to visit friends and family," and "we had never been there before and wanted to go just once." (NOTE: The Midwestern respondents had a fourth relatively important factor, "we wanted to go to the beach.") The percentages for both areas are displayed in the following pie charts.

IMPORTANT FACTORS IN DETERMINING THE DESTINATION OF THE LAST TRIP





The last vacation of the Eastern M.B.A. respondents was most likely to be North Carolina, South Carolina, or Virginia (33.9%) with the next most likely destination being Florida (10.3%). The three most important activities for their vacations were "going to the beach, lake or ocean (27.5%)," "visiting national parks (8.8%)," and "visiting historical sites (8.8%)." "Friends and relatives (62.0%)" was the most important source of information that determined the choice of destination with "prior trip that I made (19.6%)" being second most important. The next vacation destination for the Eastern students will most likely be North Carolina, South Carolina, or Virginia (31.8%) followed by Florida (7.4%) as next most likely.

In contrast, the last vacation of the Midwestern M.B.A. students was most likely to have been to Florida (19.4%) with the next most likely destination being California (13.1%). Their most important activities for a vacation were first, "going to the beach (25.7%)," second, "visiting national parks (14.3%)," and third, "visiting historical sites (11.4%)." Their most important source of information was also "friends and relatives (44.4%)" followed by a "prior trip I made myself (27.8%)." The next vacation destination for the Midwestern students will most likely be Florida (21.3%) with California being next most likely (13.1%).

Finally, the respondents were asked how much was spent on their non-business trip. For the eastern student the average amount spent per household was $622 with the most frequent response being from $0 to $300 (32.6%). For the midwestern students, the average amount spent was $733 per household with the most frequent response divided between the categories of $300 to $600 and $900 to $1,200 (27.8% each.). Thus there is a significant difference in the amount spent, which could partically be a reflection of the Eastern students' preference for nearby North Carolina, South Carolina, or Virginia as their vacation area, and the fact that they more than Midwestern M.B.A.'s tended to stay with friends and relatives rather then in hotels and motels.

Conclusions and Implications

Because of the similarity of results between this part and the next part of the report (Out-of-State Survey at Airports), this section is postponed until the end of the discussion on out-of-state airports.

SURVEY OF OUT-OF-STATE AIRPORTS

Brief Summary of Methodology and Results

An investigation into young adult travel patterns was undertaken at five major metropolitan airports in three general geographical regions; the Greater Washington D.C. - Baltimore, Maryland area, the Newark, New Jersey area, and the Chicago area. The survey was conducted in the public seating areas of those airports on both passengers and the individuals awaiting the arrival or departure of passengers. It was felt that such young adults (18 to 35 years of age) would provide important information concerning attitudes toward Florida and travel patterns in general.

The method of survey was as follows. Individuals who are considered to be 35 years of age or under were tactfully approached, and informed about the survey. Upon confirmation, individuals under 35 were then asked if they wished to participate in the study. It was estimated that of those under 35 that were approached, appromimately 85% agreed to participate.

Of those surveyed, 59.7% of the D.C. respondents, 73.0% of the Newark respondents, and 62.9% of the Chicago respondents, had been to Florida for a vacation. Of the D.C., Newark, and Chicage respondents, 40.7%, 42.3%, and 37.1% (respectively) had been to Florida in the last two years. Of the respondents, 38.3%, 34.4%, and 35.2% from the three respective areas said they were "very likely" to come to Florida in the next two years. Thus, although there were some significant area differences in who had been to Florida, the recent travel and intended future patterns to Florida were very similar.

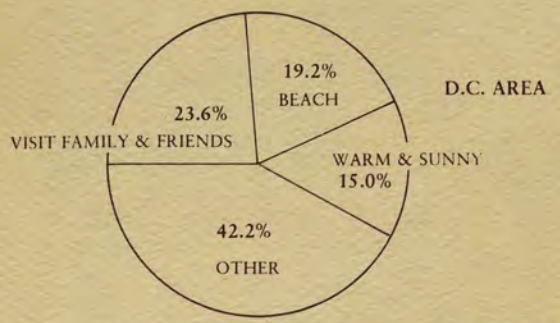
The D.C. area respondents and the Chicago area respondents tended to stay primarily with friends and relatives and secondarily in hotels and motels. In comparison, the Newark area respondents tended to stay primarily in hotels and motels and with friends and relatives secondarily. The percentages for all three areas are shown in the following table.

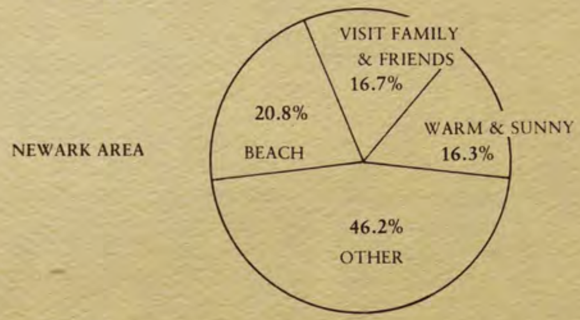
MAIN TYPE OF LODGING USED ON THE LAST NON-BUSINESS TRIP

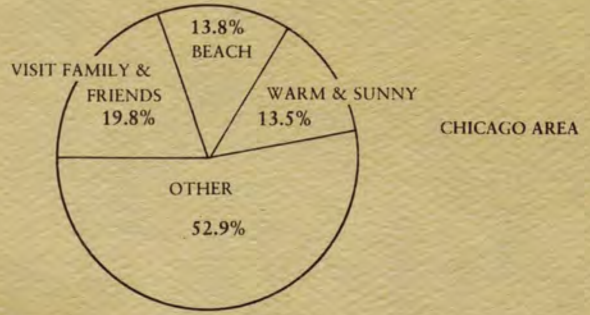
	Friends/Relatives	Hotels/Motels	Other
D.C. Area	53.4%	33.8%	12.8
Newark Area	40.5%	47.2%	12.3
Chicago Area	57.8%	29.1%	13.1

The three most influential factors determining the destination of the last vacation for the respondents of all three areas were "we wanted to visit friends and family," "we wanted to go to the beach," and "we wanted to go somewhere warm and sunny." However, the rating of these three reasons varied among the different areas. The percentages for all three areas are displayed in the following pie charts.

IMPORTANT FACTORS IN DETERMINING THE DESTINATION OF THE LAST TRIP







The last vacation of the D.C. area respondents was most likely to Florida (15.5%), with the next likely destination being North Carolina, South Carolina, or Virginia (14.0%). The three most important activities for their vacations were "going to the beach, lake or ocean (34.1%)," "visiting historical sites (9.7%)," and "visiting national parks (9.7%)." The most important source of information that determined choice of destination was "friends and relatives (62.2%)" with the next most important source being "prior trip that I made (19.8%)." For the D.C. area respondents, the next vacation destination will most likely be Florida (12.6%) followed by California (12.0%).

In comparison, the Newark area respondents on their last vacation had as their most likely destination Florida (19.3%), with the next most likely destination being New York (8.1%). Their three most important activities while on vacation were "going to the beach, ocean or lake (32.7%)," "visit national parks (7.4%)," and "going camping (7.4%)." The Newark area respondents stated that "friends and family (50.9%)" were the primary source of information that determined their choice of destination and "a prior trip that I made (28.7%)" was secondary. Their next vacation destination will most likely be Florida (12.9%) followed by California (12.2%).

The Chicago area respondents, in comparison, had Florida (16.3%) as the most likely destination of their last trip with the next most likely destination being California (7.4%). The three most important vacation activities for them were "going to the beach, ocean or lake (31.0%)," "visiting national parks (9.3%)," and "night life and dancing (7.8%)." "Family and friends (62.9%)," was stated as the most important source of information that determined their choice of destination, followed by "a prior trip that I had made (19.4%)." The next vacation destination for the Chicago area respondents will most likely be California (12.4%) with the next most likely destination being Florida (12.1%).

Conclusions and Implications

The reader should note that these conclusions and implications are for both the M.B.A. data of part II of the study, and the out-of-state airport data. By conducting our survey at airports the study tended to select under-35 year olds who were of a higher than average educational level and who had higher than average total household incomes. Consequently, it should not be unusual that the M.B.A. data from the Eastern school should closely resemble the Baltimore-Washington area airport data. Similarly, the M.B.A. data from the Midwestern school closely resembled the Chicago area airport data.

All of the out-of-state airport areas were remarkably similar in many respects and these similarities will be noted along with significiant differences. In general, Newark and Chicago seemed to manifest similar attitudes toward Florida with the Baltimore-Washington area having moderately different attitudes.

The purpose of the last trip for the respondent was mainly vacation-entertainment (50 to 60%) followed next by visiting friends-family (30 to 40%). Both Chicago and Baltimore-Washington showed a stronger tendency to travel less for entertainment (approximately 40% for both). The average trip length for all areas was approximately one week. The average total household income was relatively high ($28,000 to $33,000) as was the educational level with the average level between "some college" and "college graduate." This is not surprising given the location of our survey (i.e., airports), but it should be kept in mind as the reader interprets the significance and applications of these results.

The mode of lodging for the respondent's last trip was primarily motel-hotel (47%) and secondarily friends-relative's home (40%) for the Newark area. The Chicago and Baltimore-Washington areas probably tended to reflect the stated purpose of their trip by having the primary accommodation being friends-relative's home (50%) followed by motel-hotel (30%). The M.B.A. students of the Midwest tended to stay primarily in motels-hotels (60%) as opposed to friends-relative's homes (20%).

The average total amount spent was from $750 for the Newark and Midwest M.B.A.s to $650 for the Chicago, Baltimore-Washington and Eastern M.B.A.s. For these latter groups, the difference in spending probably reflects the stated purpose of the trip as visiting friends-relatives; hence, a lower cost associated with accommodations.

The under-35 year olds do travel, with all areas averaging 1.5 car trips and one air trip (of at least four nights away from home) within a 12-month period per household. The timing of the car trips is primarily in the summer and secondarily in the spring, although the Baltimore-Washington and Chicago areas also have substantial car travel in the fall. Their air travel is generally uniform in the summer, winter, and spring with only fall being noticeably low. In summary, the under-35 year olds do travel substantially having sufficient time and money available to make a Florida trip possible by either car or air.

In response to what activities attract the under-35 year olds, the answer was overwhelmingly "the ocean-lakes-beaches" (from 25 to 40% of all responses). The next two appealing activities for the under-35 year olds were "visiting historical areas," and "visiting national parks" (from 10 to 15% each). These three activities dominated all geographical sites and all marital status categories whether there were children present or not.

Only at the third, fourth or fifth choices do we see different regional tastes and different preferences due to marital status and children. At that level of choice, the Baltimore-Washington area liked camping (for singles and married with children) and some night life-dancing, while the married couples without children liked camping and seeing how others live. Only for the married couples with children do the theme-amusement parks show any appeal. For the Chicago area, the singles and couples without children liked night life-dancing, while the married couples with children liked camping and theme-amusement parks. However, the reader is cautioned that these levels of choices typically involved at most 8% of the respondents.

Accordingly, it is suggested that an emphasis on Florida's abundant beaches, lakes, etc., be the keystone to any publicity aimed at the under-35 year old segment. This should be coupled with an emphasis on Florida's historical sites, and on Florida's state and national parks. The promotion of theme-amusement parks would in addition be attractive to couples with children but not necessarily to singles or couples, without children. Rather for those two groups, it is recommended that publicity aimed specifically at them (besides emphasizing beaches, parks and historical sites) should include the promotion of camping facilities and the night life-dancing available.

These same issues were indirectly addressed when the respondents were asked to provide "other important factors that determined their destination choice." Only three factors accounted for over 50% of all responses. They were; the need to visit friends-family, the desire to go to the beach-lake-ocean, and the desire to go some place warm and sunny. Each of the three categories accounted for approximately 15% to 20% of the responses and was virtually either first, second, or third choice in rank of all geographical areas and all categories of marital status-children. Only for Chicago and Newark areas for married with children, and for the Midwest M.B.A. students did another factor ("we had never been there before and had to go just once") enter the picture involving only approximately 10% of the respondents.

In short, beaches and oceans seem to be the key factor in destination choice. Also, the reader will note the appearance of an additional factor (i.e., "warm and sunny") and hence the need to incorporate it as well into the promotional picture. While this may appear as "belaboring the obvious" characteristics of Florida, nevertheless it seems that at least certain segments are not informed of these "basics".

The information medium that was persuasive in determining the under-35 respondent's destination was also investigated. Again, there was remarkable agreement in the ranking and percentages of the respondent's choices. In all geographical areas and all categories of martial status-children the first choice was "friend-relative" (50 to 60%), with second choice being "prior trip I made myself" (20 to 25%), and third choice being "travel brochures" (6 to 10%). Only in the Newark area did travel agents enter as a category (approximately 7%). Again, this seems to underscore the basic need to insure the under-35 year old has a pleasant, memorable and hassle-free experience in Florida. Not only could a satisfying trip lead to a return visit, but it could also favorably influence a visitor's friends-family as well. The importance of publication, production and dissemination of travel brochures should also be noted by the reader. While travel agents, spot television and radio commercials cannot be underestimated, it would seem that brochures could play a more dominant role if they were made more readily available to the potential traveler.

Finally, an analysis of past, recent past, and future travel to Florida was undertaken to help determine specific travel patterns to Florida. To understand the following percentages the reader must realize that they are not percentages of the total under-35 year old population. An unknown percentage of that population never really travels out of it's own general locale or state and hence, is inaccessible to the Florida market. Also, because of the nature and location of the surveys (i.e., at airports), the 18-to-35 year olds interviewed seemed to have higher than average household incomes and educational levels, and tended to travel more frequently (approximately 2.5 trips over 4 or more nights away from home on the average) than typical 18-to-35 year olds. The reader would be wise to keep these aspects in mind as the following results are presented.

When considering if the respondent had every been to Florida the percentage responding "Yes" varied from 64% to 75%. It was markedly higher for the M.B.A. students from the Midwest with from 90% to 100% having been to Florida. Historically, it seems that of all the three areas, Florida has done least well in the Baltimore-Washington area, particularly for the category of married with children. This seems to be a reflection of the fact that the Baltimore-Washington area tends to think of Virginia-North and South Carolina when they think of beaches and of a more pronounced tendency to visit friends-family and hence, possibly stay nearer their own home. Nevertheless even in this "poorest performance" category at least 50% had visited Florida.

When the respondents were asked if they had been to Florida in the last two years, interestingly it was the single category for all areas that responded most frequently "Yes", with from a low of 40% (Chicago), to a high of 60% (Newark). The married without children category responded the lowest with from 30% (Chicago and Baltimore-Washington) to 40% (Newark). The married with children category very closely resembles the married without children category with respect to recent past visits to Florida.

When the respondents were asked if they were planning to come to Florida within the next two years the results again were curiously different. The group with the most "Yes" responses was the singles category from Chicago and the Baltimore-Washington area, with over 40% saying they plan to come to Florida in the near future. All other cateogies for Chiacago and Baltimore-Washington had an approximately uniform 30%. For the Newark area, the most "Yes" responses came from the category of married with children with over 50%, while 30% of the singles category said "Yes". The lowest percentage of "Yes" responses from all the areas and marital status categories was the couples with no children (25%) also from Newark. In short, for the near future, Florida seems to have good uniform appeal to the areas of Chicago and Baltimore, doing well there particularly for the singles. Newark on the other hand, seems to mirror the statement that "Florida is a good vacation for couples with children, but not for singles or couples without children".

Nevertheless, while it is difficult to estimate just how great a market share Florida should or could have in the under-35 year old age group, it seems that 15% to 20% of the 18-to-35 year old age respondents interviewed have "very likely" intentions of coming to Florida within the next 12 months. There is also an additional 10% to 15% who responded "perhaps" to the question of coming to Florida within the next year. These additional clientele seem to be open to coming to Florida.

In closing, the position of Florida in the under 35-year old market seems to be good with positive attitudes held by the vast majority. A concerted emphasis on certain factors important to that segment (beaches-ocean, national and state parks, historical sites, warm weather and sunshine) plus an equally concerted effort to ensure that their stay is memorably good and hassle free would most likely insure not only their return, but act as perhaps the most influential promotion Florida could offer to other under 35 year olds.

* This digest is part of a study that was authorized by the *Florida Division of Tourism*. Again, we would like to thank them for their cooperation. The complete study may be obtained from the Florida Division of Tourism, Office of Marketing Research, Collins Building, Tallahassee, Florida 32301.