# 2015 -2016

# Overseas Visitors to Fort Lauderdale

# Fort Lauderdale Overseas Visitors 2015 - 2016 Report

## Table of Contents

# Fort Lauderdale Overseas Visitors 2015 - 2016 Report

## Introduction and Methodology

**Introduction**

This report is a benchmark report for the Greater Fort Lauderdale Convention and Visitors Bureau (GFLCVB).

Note: Fort Lauderdale is reported as FTL throughout the remainder of this report.

The goal is to establish reliable metrics that can be used to explain the value and yield of overnight overseas visitors traveling to and staying in Fort Lauderdale.  The metrics provide strategic data driven guidance for policy makers, stakeholders, and the GFLCVB team.  To ensure the metrics are effective they comply with both industry and governmental standards.

To meet the goal the core metrics are focused on adhering to universal global standards for defining an overseas visitor.  The United Nations World Tourism Organization and the U.S. National Travel and Tourism Office (NTTO) report visitors as:

1. A resident of a country outside the United States.  The person must reside and remunerate their income from outside the United States.

2. A visitor is traveling to and within the U.S. for vacation/holiday, business, convention, education/student, medical, or religious purposes.  It does not include passenger and travelers that are traveling for other purposes (i.e., immigrating).

3.  A person that stayed at least one night in the U.S. and by extension FTL.

What is not included in the metrics is also important.  The visitor metrics in this report excludes day visitors.  The report is also a starting point and does not report total international visitation.  It focuses on only overseas and Mexico but excludes Canadian overnight visits.  The addition of overnight Canadian visitors will be developed and incorporated in the near future.

A focus on value and yield:  The report highlights overnight visits and total direct spending from overseas visitors, but it seeks to highlight shifts and explain the shifts in travel to the U.S. and FTL.  The report also focuses on yield in terms of visitor nights and nights spent in a hotel while visiting FTL.

**Methodology Considerations**

Overseas visitors to FTL is based on data compiled from the 2016 U.S. Department of Commerce, NTTO, *Survey of International Air Travelers* (SIAT) custom report for FTL and the national report which provides overseas and country-level comparative metrics. In addition to the custom metrics, other resources are incorporated to verify and enhance the "visitor story."

The other key resources are sources that have been vetted to clarify what they report and what they do not report, as well as how well they adhere to national visitor definitions. For example, a passenger flying from London to FTL does not necessarily equate to being counted as a visitor to FTL unless they meet the following criteria: 1.) reside in the UK, 2.) traveled for visitor purposes (identified above), and 3.) stayed at least one night in FTL.

Supporting resources include: the Airline Passenger Information System (APIS), custom analysis and data from the I-94 port of entry and first intended address data, custom FTL data from proprietary booking data, Bureau of Economic Analysis, other competitive resources within Florida and the United states. Additionally, other general information from NTTO, WTO, Brand USA, US Travel, and the Travel Market Insights Inbound Travel Monitor and Travel Trade Barometer Program.

The *Survey of International Air Travelers* (SIAT) is the primary resource. The SIAT is an ongoing research program which gathers statistical data about consumers that are air passengers traveling in the U.S. – it focuses on overseas residents and Mexican air travelers. The survey data provides information on passenger trip planning, travel patterns, demographics, and spending.

The survey has been conducted on a monthly basis continuously since January 1983. The survey is administered throughout the month, every month of the calendar year. NTTO conducts this program as part of its statistical system (which includes the DHS I-94 and I-92/APIS data) in order to comply with requirements noted in Section 10 of Public Law 104-288, the National Tourism Organization Act of 1996. The Act states that Commerce is to collect and publish comprehensive international travel and tourism statistics and other marketing information. In addition, this program is implemented to enable the Bureau of Economic Analysis (BEA) to comply with Section 8 of the Bretton Woods Agreements Act of 1945 (Public Law 79-171, as amended), and implemented by Executive Order No. 10033, which requires BEA to provide export/import and Gross Domestic Product (GDP) data for the country. The survey data also contributes to the BEA Travel and Tourism Satellite Account (TTSA) program for the United States.

More recent legislation, the Travel Promotion Act of 2009, mandates that NTTO continue and expand its research activities including the SIAT.  In addition, the Office of Management & Budget (OMB) re-approved the survey program (0625-0227) as a necessary data collection tool.

The survey (available in 12 languages and consisting of 32 multi-part questions) is self-administered by the passenger who volunteers to take it on departure from the U.S. after their entire visit to the U.S. is completed.  The surveys are distributed and collected by two methods: either by flight attendants onboard the flight or by contractors in the departing gate area.  The survey is conducted on selected flights which have departed, or are about to depart, from major U.S. international gateway airports.  Over 80 airlines (foreign and U.S.) departing U.S. international gateways participate in the survey program.

The sample universe for the SIAT consists of all international air travelers to or from the U.S. (except Canadians). However, there are two separate populations being targeted. One population is comprised of U.S. residents departing the U.S. on the originating leg of their flight. The other population is non-resident visitors (specific visa types) who are on their return leg home and are aboard the same outbound flight departing the United States.

Sample selection is made, on a random basis, of scheduled flights (clusters) from among all participating airlines that depart the U.S. to overseas or Mexican destinations. A computer program selects a random sample of flights to be surveyed from an electronic database of scheduled airline flights. Major charter carriers are also included in the program. The number of flights sampled proportionately reflects the total number of flights offered by carrier and the dispersion of flights by destination.

Survey data is gathered from self-administered questionnaires. Due to the 'skip-pattern' design of the questions, the same questionnaire is used for both resident and non-resident visitors.

To improve airport specific and destination collections, the Supplemental Airport Survey Program (SASP) is conducted through NTTO as a public/private partnership to survey additional international flights on a monthly basis.  The SASP is conducted in partnership with FTL at the airport.

Currently, NTTO orchestrates the SASP in Atlanta, Baltimore, Boston, Denver, Dallas/Fort Worth, Fort Lauderdale, Honolulu, Houston, Las Vegas, Los Angeles, Miami, Minneapolis, Orlando, Philadelphia, San Juan, Washington Dulles and others.  Each program is slightly different, but the supplemental collections are being conducted to improve the quality of the data collections at each airport and for the

overall program.  In all cases the airport authority works in cooperation with its convention and visitors bureau (destination marketing organization).

FTL sampling comes from all of the U.S. ports of entry/departure that have international flights, including sampling at the Fort Lauderdale-Hollywood International Airport and all major Florida international departure locations.  The sampling is based on targets set for outbound flights departing the U.S. from the airports.

In 2016 the FTL sample was 5,176 respondents.  In 2015 the 5,369 respondents.  This is an adequate sample size for overseas visitors, providing an opportunity to evaluate the characteristics of the overseas visitor market.  However, sampling levels are statistically low for some of the visitor markets to FTL and are intended for internal use and should be used when put into context with additional market insight and data support developed by Travel Market Insights Inc.

Potential Visitor Pool:  To ensure only statistically relevant metrics are referenced some visitor markets were assessed from a larger lens.  In this case the GFLCVB is also introduced to South Florida visitors.

South Florida visitors are defined, for the purposes of this report, as an overnight visitor in South Florida "excluding those that only went to Miami and no other destination within South Florida."  The South Florida definition intentionally excludes visitors that stayed overnight in Miami but did not travel and stay overnight in another destination outside of Miami.

Overseas Visitor Spending Methodology:

The Bureau of Economic Analysis (BEA) reports U.S. level spending by select countries.  The data is widely accepted and is a global standard.  The BEA U.S. inbound travel spend model relies on visits and spend by country of residency.  For all countries, other than Canada and Mexico and excluding cruise-related travel expenditures, this sub-aggregate component of the travel account is derived by multiplying the number of travelers by a measure of their average expenditures.
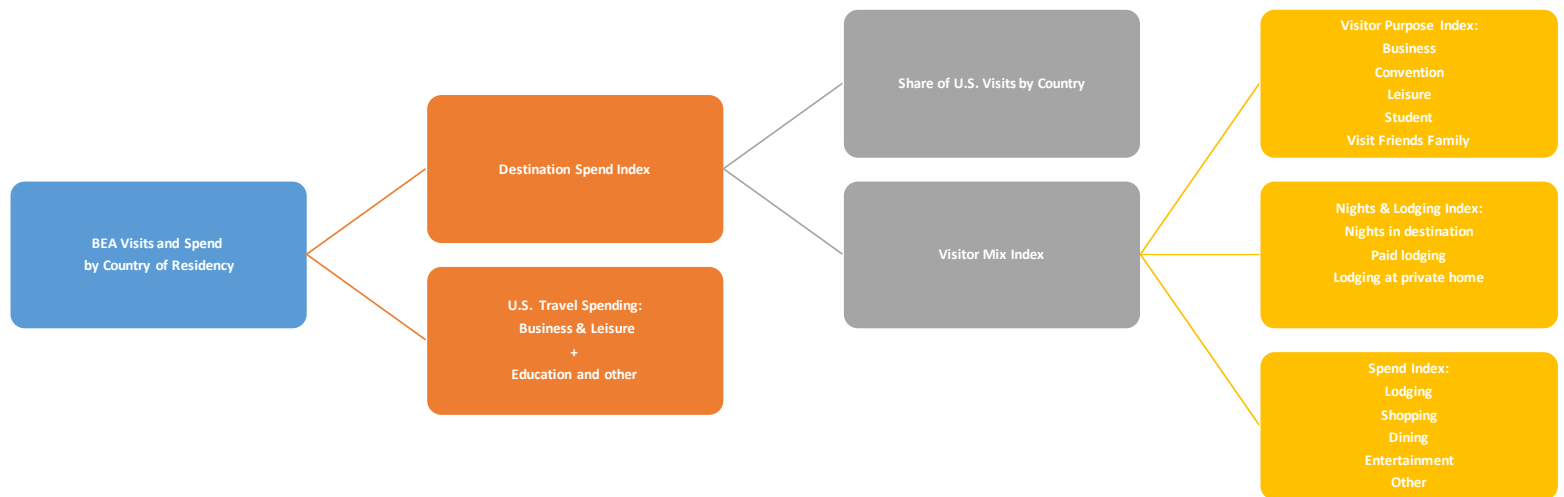
Average expenditures are based on data obtained from the SIAT, conducted by NTTO. The number of travelers and SIAT expenditure data include the country of residence for foreign travelers to the United States.

The Travel Market Insights Inbound Travel Monitor program incorporates the BEA spending model to the U.S. into a destination level spending model.  The core of the model is from a comprehensive destination index model – *the Destination Visitor Index Spending Model.*  It is based on U.S. arrivals (by country of residency) and spending based on BEA Travel Spend + Education and other spending.  The U.S. visitor is indexed with the destination visitor by purpose of trip index, nights and lodging index, nights in destination, nights in private lodging, and lodging at private homes.  A spending index is also applied by lodging, shopping, dining, entertainment, and other spend.

By indexing the FTL visitor to the U.S. visitor and creating a visitor index the model establishes a destination's share of spending to the United States.

**Destination Spend Model – Destination Visitor Index**

```
BEA Visits and Spend            Destination Spend Index          Share of U.S. Visits by Country      Visitor Purpose Index:
by Country of Residency                                                                                     Business
                                                                                                           Convention
                                U.S. Travel Spending:             Visitor Mix Index                         Leisure
                                Business & Leisure                                                          Student
                                         +                                                             Visit Friends Family
                                Education and other
                                                                                                     Nights & Lodging Index:
                                                                                                      Nights in destination
                                                                                                          Paid lodging
                                                                                                    Lodging at private home

                                                                                                         Spend Index:
                                                                                                           Lodging
                                                                                                           Shopping
                                                                                                            Dining
                                                                                                        Entertainment
                                                                                                            Other
```

Every destination is different!  The custom destination visitor index accounts for each destination's unique mix of countries, plus each country's unique visitor travel characteristics.

(this page was intentionally left blank)

## Overseas Visitors to Fort Lauderdale Summary

# 1 million visitors accounted for 1.9 million room nights and over $2 billion in direct spending.

| Overseas Visitors to Fort Lauderdale | | | |
|---|---|---|---|
| | 2015 | 2016 | % Change 2016/2015 |
| All Overseas | 902,000 | 1,015,000 | 12.5% |

| Hotel Room Nights Spent in Fort Lauderdale | | | |
|---|---|---|---|
| (In Millions) | 2015 | 2016 | % Change 2016/2015 |
| Room Nights | 1.6 | 1.9 | 18.8% |

| Spending by Overseas Visitors in Fort Lauderdale | | | |
|---|---|---|---|
| (In Billions USD) | 2015 | 2016 | % Change 2016/2015 |
| Direct Spending | $1.768 | $2.046 | 15.7% |

- In 2016 Fort Lauderdale hosted 1 million overseas visitors.

- Visits to FTL from overseas countries outperformed the U.S. substantially in 2016.  Visits increased 13% in 2016.  By comparison, U.S. visits declined -2.1% overall and -3.2% for the U.S. mainland.

- The 1 million visitors accounted for 1.9 million room nights in 2016, up 19% from 1.6 million room nights in 2015.  Visitors stayed in FTL 7.4 nights on average.

- In 2016 the 1 million visitors' week long stay generated over $2 billion in direct spending in FTL.  Each visitor spent an average of $2,016 per stay or $272 per visitor per night in 2016.
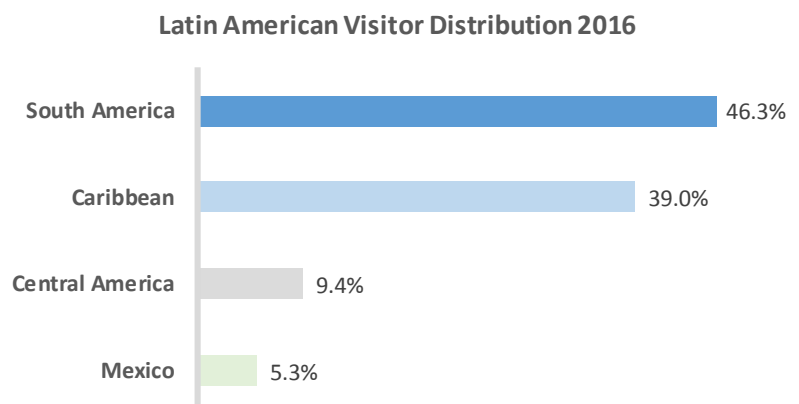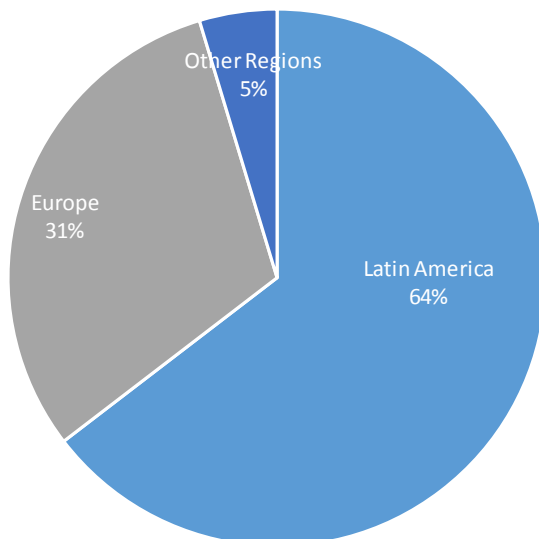
# Fort Lauderdale Overseas Visitors 2015 - 2016 Report

## Visitor Arrivals by select World Regions and Markets

- The majority (64%) of overseas visitors to FTL reside in Latin America.  In 2016 visits increased 9% from Latin America.  South America accounted for 46% of the visitors from Latin America in 2016, followed by the Caribbean (39%).

- European visitors accounted 31% of all overseas visitors to FTL in 2016.  Visits from Europe increased slightly in 2016 (up 1%).

| Origins of Overseas Visitors | | | |
|---|---|---|---|
| | 2015 | 2016 | % Change 2016/2015 |
| All Overseas | 902,000 | 1,015,000 | 12.5% |
| Latin America | 644,000 | 701,000 | 8.9% |
| South America | 305,000 | 325,000 | 6.6% |
| Caribbean | 228,000 | 273,000 | 19.7% |
| Central America | 40,000 | 66,000 | 65.0% |
| Mexico Air | 71,000 | 37,000 | -47.9% |
| Europe | 331,000 | 334,000 | 0.9% |
| Other Regions | 37,000 | 51,000 | 37.8% |

Other Regions include: Asia, Oceania, Middle East, and Africa.





Latin American Visitor Distribution 2016

South America 46.3%
Caribbean 39.0%
Central America 9.4%
Mexico 5.3%

# Fort Lauderdale Overseas Visitors 2015 - 2016 Report
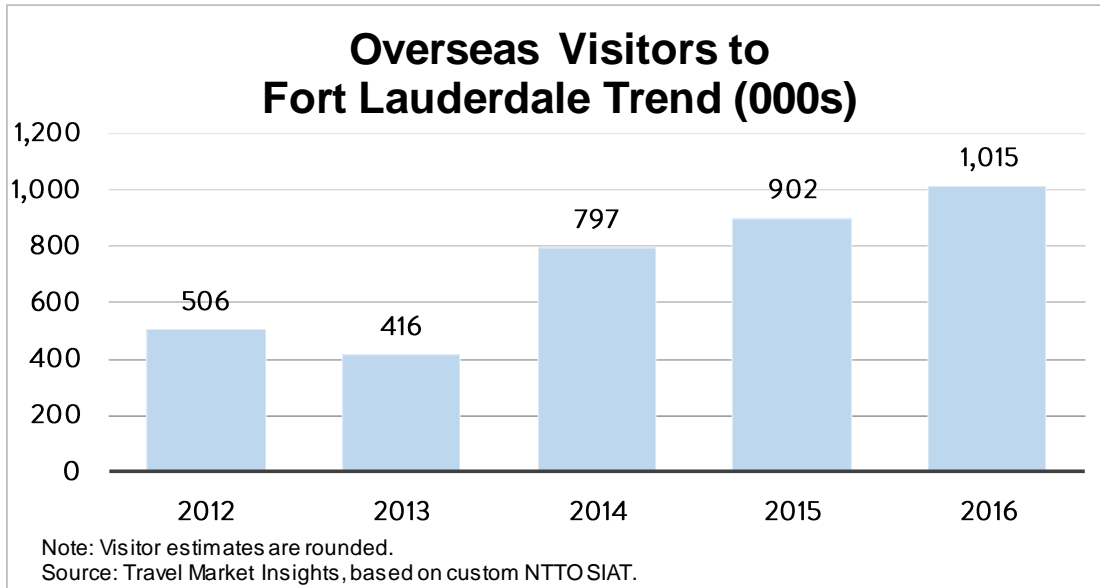
## Overseas Visitor Arrivals from Select Markets

- The top visitor market in 2016 was the Bahamas, outpacing Brazil. Colombia ranked third, followed by Germany and the United Kingdom ranked fifth.

- The Germanic markets rank as the top combined visitor market. When combined, Germany, Austria, and Switzerland visits registered 108,000 in 2016, up 17% from 2015.

- The United Kingdom and Ireland combined registered a sharp decline in 2016.

- Argentina and Uruguay combined contracted slightly.

- Ecuador and Peru combined registered 49,000 visitors, up 18,000 visitors from 2015.

- Scandinavia as a region registered 70,000 visitors in 2016, up slightly from 69,000 in 2015.

| Overnight Visitors from Overseas Markets | | | |
|---|---|---|---|
| | 2015 | 2016 | % Change 2016/2015 |
| All Overseas | 902,000 | 1,015,000 | 12.5% |
| Bahamas | 101,000 | 99,000 | -2.0% |
| Brazil | 110,000 | 95,000 | -13.6% |
| Colombia | 79,000 | 89,000 | 12.7% |
| Germany | 63,000 | 77,000 | 22.2% |
| United Kingdom | 71,000 | 63,000 | -11.3% |
| GER/AUS/SWI | 92,000 | 108,000 | 17.4% |
| UK/IRE | 78,000 | 63,000 | -19.2% |
| ARG/URU | 39,000 | 38,000 | -2.6% |
| ECU/PERU | 31,000 | 49,000 | 58.1% |
| Scandinavia | 69,000 | 70,000 | 1.4% |

Note: The combined regions reflect marketing strategies for similar countries.

## Overseas Visitor Arrivals Historic Trend

**Overseas Visitors to
Fort Lauderdale Trend (000s)**

- 2012: 506
- 2013: 416
- 2014: 797
- 2015: 902
- 2016: 1,015

Note: Visitor estimates are rounded.
Source: Travel Market Insights, based on custom NTTO SIAT.

- Overseas visits to FTL peaked in 2016 at a record 1 million visitors.

- Visits to FTL registered an increase in visits the last three years in a row. Visits increased 100% from 2012 to 2016, and 144% from the low registered in 2013.

- Fort Lauderdale increased its competitive position in the past three years as well. In 2016 FTL attracted 2.70% of all overseas visitors to the United States. By comparison, in 2013 FTL only attracted 1.30% of all overseas visitors.
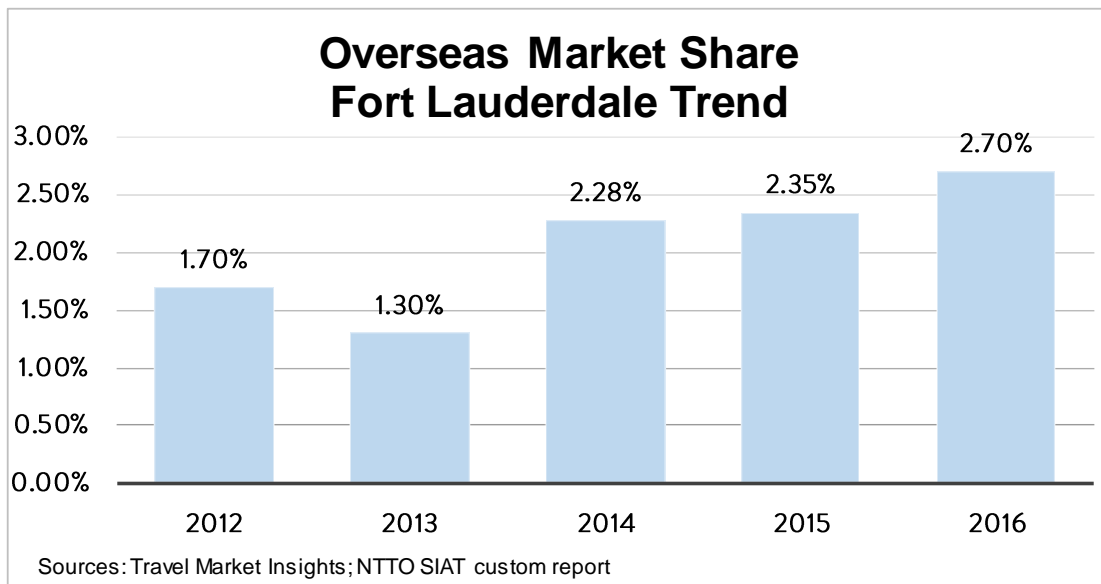
**Overseas Market Share
Fort Lauderdale Trend**

- 2012: 1.70%
- 2013: 1.30%
- 2014: 2.28%
- 2015: 2.35%
- 2016: 2.70%

Sources: Travel Market Insights; NTTO SIAT custom report

11

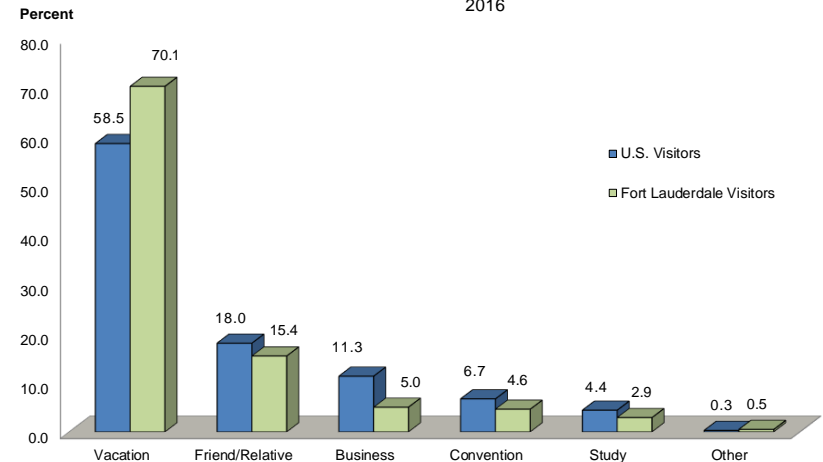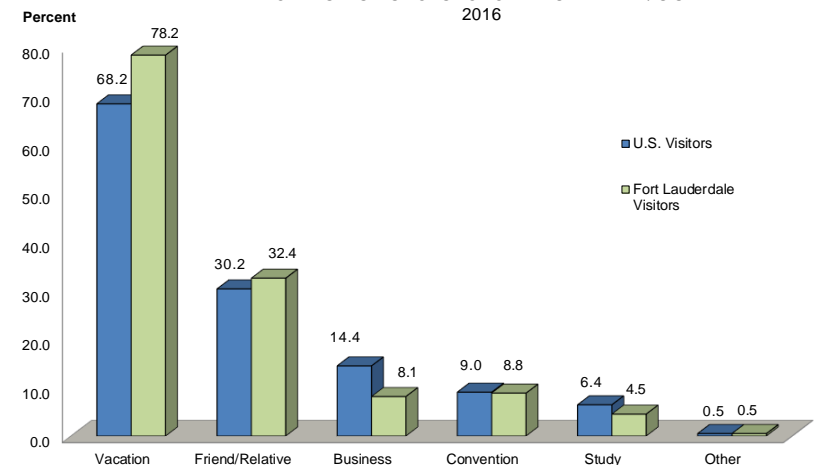# Visitor Characteristics

## Purpose of Visit

- In 2016 seven in ten (70%) overseas visitors indicated their main purpose for visiting was for a vacation. FTL hosted a considerably higher percent of vacation visitors compared to the U.S. average (at only 58.5%).

- In 2015 72% of the overseas visitors indicated their main purpose for visiting was for a vacation.

- Scandinavia registered the highest share of vacation visitors (86.6%), down slightly from (87.5%).

- Compared to the average overseas visitor to the U.S., FTL visitors are less likely to visit family/friends (VFR), travel for business, convention, and to study.

- When visitors report all of their purposes of visit it is clear that even though the large majority are primarily traveling for vacation, many are taking a multiple purpose trip.

- Travelers taking a multiple purpose of trip primarily combine vacation and some time to visit with family and friends.

- VFR visitors to FTL (as a multiple purpose of trip) registered nearly a third (32.4%) of the overseas, just slightly higher than the U.S. average at 30 percent.

**MAIN PURPOSE OF U.S. TRIP**
OVERSEAS VISITORS TO FORT LAUDERDALE / U.S.
2016

Percent

- Vacation: U.S. Visitors 58.5, Fort Lauderdale Visitors 70.1
- Friend/Relative: U.S. Visitors 18.0, Fort Lauderdale Visitors 15.4
- Business: U.S. Visitors 11.3, Fort Lauderdale Visitors 5.0
- Convention: U.S. Visitors 6.7, Fort Lauderdale Visitors 4.6
- Study: U.S. Visitors 4.4, Fort Lauderdale Visitors 2.9
- Other: U.S. Visitors 0.3, Fort Lauderdale Visitors 0.5

Sources: Travel Market Insights, Survey of International Air Travelers to the United States - 2016

**MULTIPLE PURPOSE OF U.S. TRIP***
OVERSEAS VISITORS TO FORT LAUDERDALE / U.S.
2016

Percent

- Vacation: U.S. Visitors 68.2, Fort Lauderdale Visitors 78.2
- Friend/Relative: U.S. Visitors 30.2, Fort Lauderdale Visitors 32.4
- Business: U.S. Visitors 14.4, Fort Lauderdale Visitors 8.1
- Convention: U.S. Visitors 9.0, Fort Lauderdale Visitors 8.8
- Study: U.S. Visitors 6.4, Fort Lauderdale Visitors 4.5
- Other: U.S. Visitors 0.5, Fort Lauderdale Visitors 0.5

Source: Travel Market Insights, Survey of International
Air Travelers to the United States - 2016
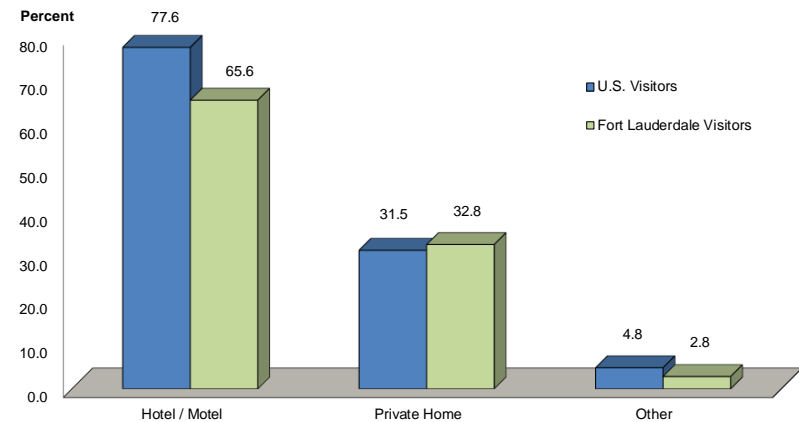* = multiple response

13

## Accommodations

- In 2016 two thirds (66%) of the overseas visitors to FTL stayed in a hotel/motel.

- One third (33%) stayed in a private home (with friends and family) and 3% stayed in other accommodations.

- By comparison, fewer of the visitors to FTL stayed in a hotel/motel compared to the U.S. average at 78 percent.

- FTL visitors registered a slightly higher share (33%) using private homes for lodging compared to the U.S. (32%).

- In 2015 nearly the same percent stayed in a hotel/motel (65%) and 30% stayed in a private home.

Pre-Booked Lodging:  Two thirds (66%) booked their lodging before they arrived in FTL.

- Over one third (36%) of the FTL visitors pre-booked their lodging online, well above the U.S. (30%).

- Nearly one fifth (19%) pre-booked their lodging directly with the hotel.

**ACCOMMODATIONS***
OVERSEAS VISITORS TO FORT LAUDERDALE / U.S.
2016



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2016
* = multiple response

**WERE LODGING RESERVATIONS MADE BEFORE LEAVING HOME, IF SO HOW?***
OVERSEAS VISITORS TO FORT LAUDERDALE / U.S.
2016
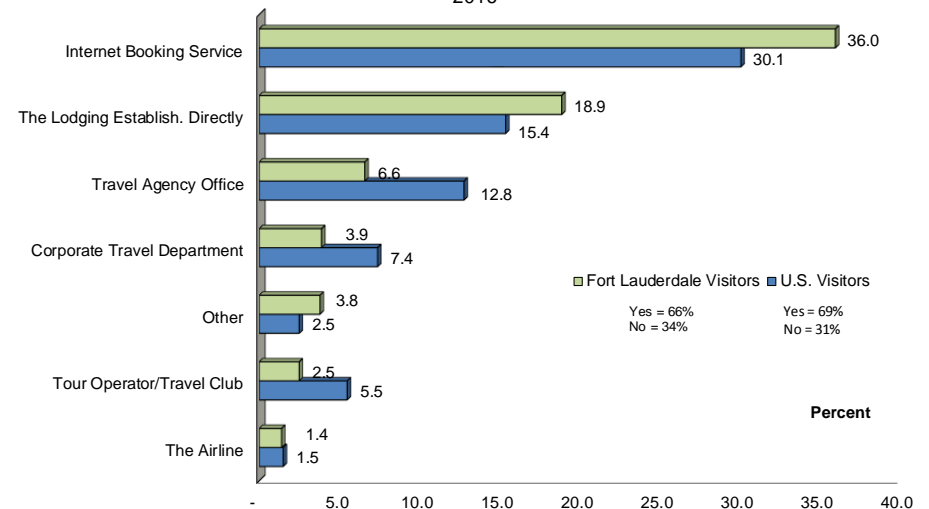


Fort Lauderdale Visitors: Yes = 66%, No = 34%
U.S. Visitors: Yes = 69%, No = 31%

Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2016
* = multiple response

# Fort Lauderdale Overseas Visitors 2015 - 2016 Report

## Room Nights

- In 2016 FTL lodging properties attained nearly 1.9 million room nights from overseas visitors.

- Visitor room nights increased 19% in 2016, up from nearly 1.6 million in 2015.

- Visitors explored FTL for more than a week (7.4 nights) on average in 2016, up from 6.5 nights in 2015.

- Two thirds (66%) of the 1 million total overseas visitors stayed in a hotel/motel in 2016. The percent was nearly the same in 2015.

- Each visitor that stayed in a hotel spent 4.8 nights, on average. Unchanged from 2015.

- The average party size for visitors was 1.7 persons, unchanged from 2015.

- What if? If FTL increased the average nights in hotel by just 1 night to 5.8 nights in 2016, then overseas visitors would have accounted for nearly 2.3 million room nights.

- If FTL increased the percent of visitors staying in a hotel by just 5 points to 70.6% in 2016, then overseas visitors would have accounted for just over 2 million room nights.

## Overseas Visitors to FTL accounted for 1,880,000 Room Nights

### Hotel Room Nights Spent in Fort Lauderdale

| (In Millions) | 2015 | 2016 | % Change 2016/2015 |
|---|---|---|---|
| Room Nights | 1.6 | 1.9 | 18.8% |

### 2016 OVERSEAS VISITOR HIGHLIGHTS

| | Overseas to Fort Lauderdale | |
|---|---|---|
| | 2015 | 2016 |
| Estimated Arrivals | 902,000 | 1,015,000 |
| | | |
| Nights in Fort Lauderdale | 6.5 | 7.4 |
| Stayed in hotel | 65.1% | 65.6% |
| Nights in hotel | 4.8 | 4.8 |
| Rm. Nights Sold | 1,565,872 | 1,880,019 |
| Nights in U.S. | 15.1 | 15.4 |
| Share of Nights | 43.0% | 48.1% |

15

# Fort Lauderdale Overseas Visitors 2015 - 2016 Report

## Leisure Activities

- Shopping was the top activity visitors participated in during their visit to FTL in 2016 and 2015. Nearly all (95%) visitors spent some time during their weeklong stay to go shopping.

- By comparison, the average overseas visitor also ranked shopping as the top activity, however, only 86% actively shopped.

- Sightseeing was the second most popular activity (66%). However, compared to the U.S. (78%) there was a 12 point difference.

- Experiencing fine dining ranked third (35%), followed by amusement/theme parks (34%).

- Visitors to FTL also enjoyed exploring small towns/countryside and national parks.

- Enjoying historical locations and taking guided tours rounded out the top activities.

**LEISURE-RECREATION ACTIVITIES***
OVERSEAS VISITORS TO FORT LAUDERDALE
2016
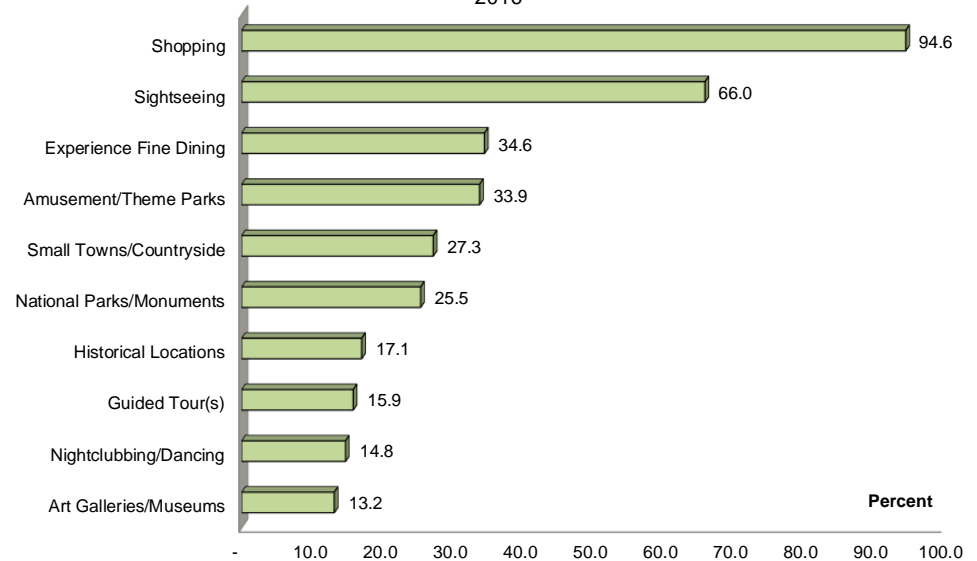
| Activity | Percent |
|---|---|
| Shopping | 94.6 |
| Sightseeing | 66.0 |
| Experience Fine Dining | 34.6 |
| Amusement/Theme Parks | 33.9 |
| Small Towns/Countryside | 27.3 |
| National Parks/Monuments | 25.5 |
| Historical Locations | 17.1 |
| Guided Tour(s) | 15.9 |
| Nightclubbing/Dancing | 14.8 |
| Art Galleries/Museums | 13.2 |

Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2016
* = multiple response

**LEISURE-RECREATION ACTIVITIES***
OVERSEAS VISITORS TO FORT LAUDERDALE / U.S.
2016
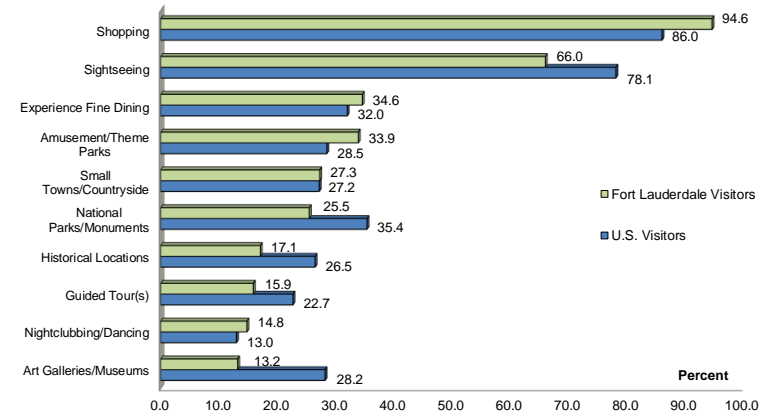
| Activity | Fort Lauderdale Visitors | U.S. Visitors |
|---|---|---|
| Shopping | 94.6 | 86.0 |
| Sightseeing | 66.0 | 78.1 |
| Experience Fine Dining | 34.6 | 32.0 |
| Amusement/Theme Parks | 33.9 | 28.5 |
| Small Towns/Countryside | 27.3 | 27.2 |
| National Parks/Monuments | 25.5 | 35.4 |
| Historical Locations | 17.1 | 26.5 |
| Guided Tour(s) | 15.9 | 22.7 |
| Nightclubbing/Dancing | 14.8 | 13.0 |
| Art Galleries/Museums | 13.2 | 28.2 |

Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2016
* = multiple response

## Port of Entry and Transportation

- Overseas visitors to FTL primarily used two points of entry into the United States.  Combined, the Miami and Fort Lauderdale airports were used by 82% of the overseas visitors to FTL in 2016.

- Miami was the top port of entry for visitors to FTL.  Just under half (47%) used Miami as a port of entry and then traveled to FTL.

- The second largest point of entry was Fort Lauderdale-Hollywood International Airport.  Nearly 35% of the FTL overseas visitors entered the U.S. at the airport.

- Use of Fort Lauderdale-Hollywood International Airport increased 2.2 points, up from 32.4% in 2015. This is a good indicator that growth in air service and demand to visit FTL go hand in hand.

- New lift into the Fort Lauderdale-Hollywood International Airport in 2017 and 2018 should result in increased opportunity to convert passengers into visitors.

- Visitors to FTL like to rent a car (63%) and over one third (35%) used a private or company car to travel within and around the Greater Fort Lauderdale area.

- One in every ten (11%) overseas visitors took a cruise.

**PORT OF ENTRY OF OVERSEAS VISITORS**
OVERSEAS VISITORS TO FORT LAUDERDALE
2016
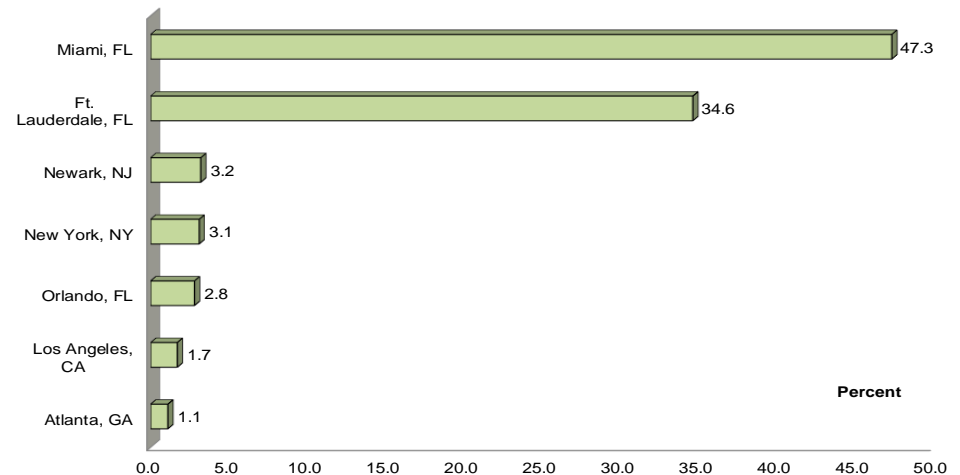
| Port | Percent |
|------|---------|
| Miami, FL | 47.3 |
| Ft. Lauderdale, FL | 34.6 |
| Newark, NJ | 3.2 |
| New York, NY | 3.1 |
| Orlando, FL | 2.8 |
| Los Angeles, CA | 1.7 |
| Atlanta, GA | 1.1 |

Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2016

**TRANSPORTATION IN THE U.S.***
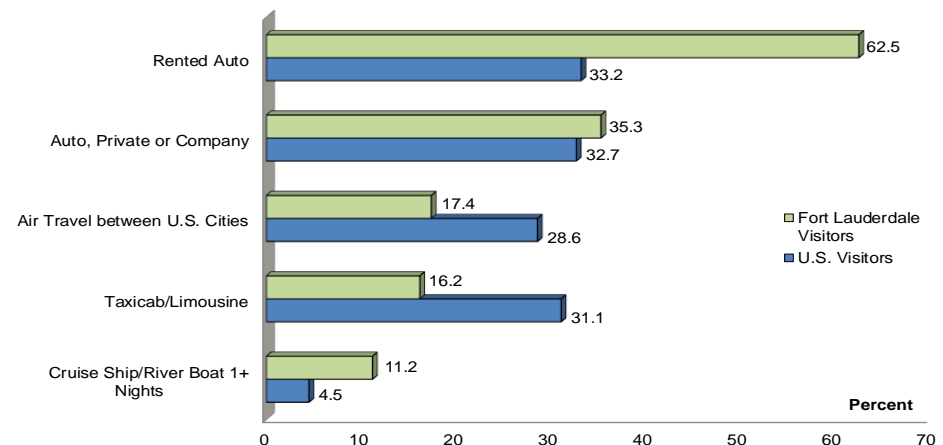OVERSEAS VISITORS TO FORT LAUDERDALE / U.S.
2016

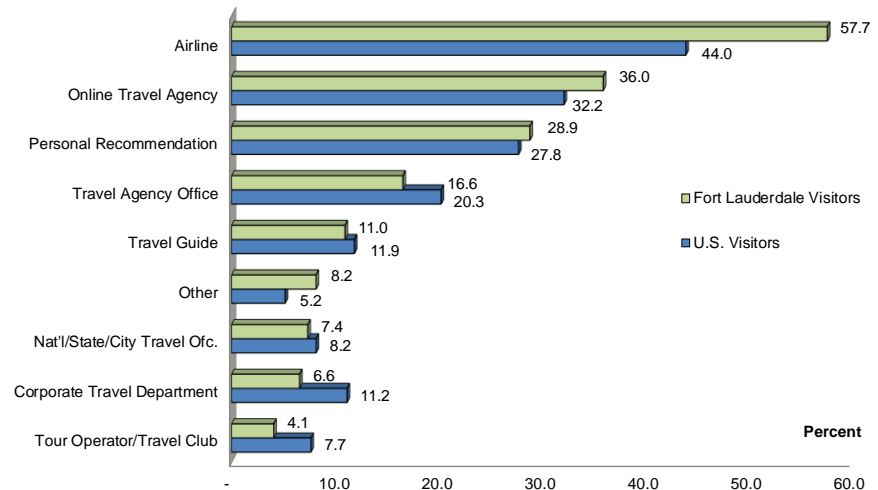| Mode | Fort Lauderdale Visitors | U.S. Visitors |
|------|--------------------------|---------------|
| Rented Auto | 62.5 | 33.2 |
| Auto, Private or Company | 35.3 | 32.7 |
| Air Travel between U.S. Cities | 17.4 | 28.6 |
| Taxicab/Limousine | 16.2 | 31.1 |
| Cruise Ship/River Boat 1+ Nights | 11.2 | 4.5 |

Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2016
* = multiple response

17

# Fort Lauderdale Overseas Visitors 2015 - 2016 Report
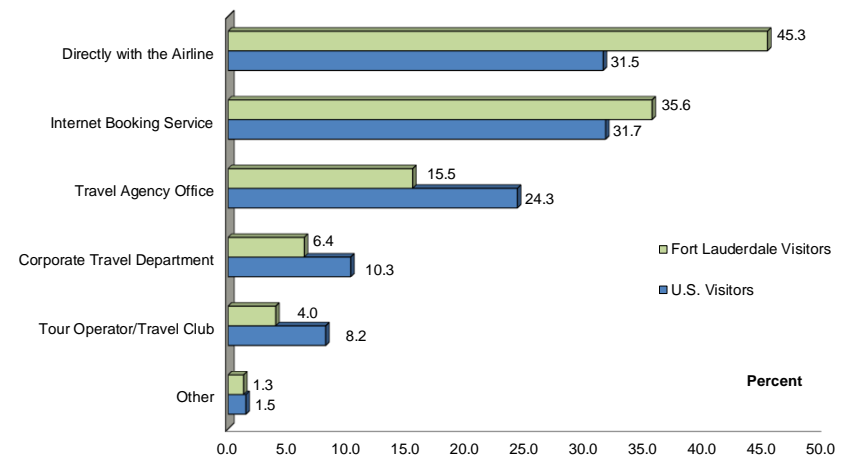
## Information Sources and Air Reservations

- Airlines were the top information source for overseas visitors to FTL in 2016. The majority (58%) used an airline to gather travel information, well above the U.S. average (44%).

- Online travel agencies ranked as the second highest information source, followed by personal recommendations (which includes social media).

- The top three sources for FTL all registered stronger use than the U.S. overall.

- The airlines are both an important mode of transportation and an information source for choosing FTL.

- Airline reservations were made direct with the airline by 45% of the FTL overseas visitors – it was the top means for making a reservation. Internet booking services were used by 36% of the FTL visitors.

- The overseas visitor to FTL is well traveled. Nearly all (93%) have visited the U.S. previously, which is substantially higher than the U.S. (76%) overall. In addition, on average FTL visitors travel to the U.S. 2.2 times per year. The maturity of the visitors is reflected in how visitors gather their information and book their air travel.

**TRAVEL INFORMATION SOURCES***
OVERSEAS VISITORS TO FORT LAUDERDALE / U.S.
2016

| Source | Fort Lauderdale Visitors | U.S. Visitors |
|---|---|---|
| Airline | 57.7 | 44.0 |
| Online Travel Agency | 36.0 | 32.2 |
| Personal Recommendation | 28.9 | 27.8 |
| Travel Agency Office | 16.6 | 20.3 |
| Travel Guide | 11.0 | 11.9 |
| Other | 8.2 | 5.2 |
| Nat'l/State/City Travel Ofc. | 7.4 | 8.2 |
| Corporate Travel Department | 6.6 | 11.2 |
| Tour Operator/Travel Club | 4.1 | 7.7 |

Percent

Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2016
* = multiple response

**HOW AIRLINE RESERVATIONS WERE MADE***
OVERSEAS VISITORS TO FORT LAUDERDALE / U.S.
2016

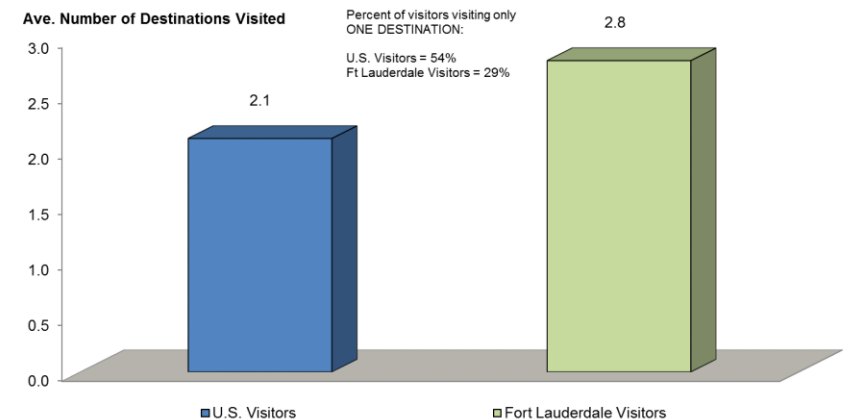| Source | Fort Lauderdale Visitors | U.S. Visitors |
|---|---|---|
| Directly with the Airline | 45.3 | 31.5 |
| Internet Booking Service | 35.6 | 31.7 |
| Travel Agency Office | 15.5 | 24.3 |
| Corporate Travel Department | 6.4 | 10.3 |
| Tour Operator/Travel Club | 4.0 | 8.2 |
| Other | 1.3 | 1.5 |

Percent

Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2016
* = multiple response

18

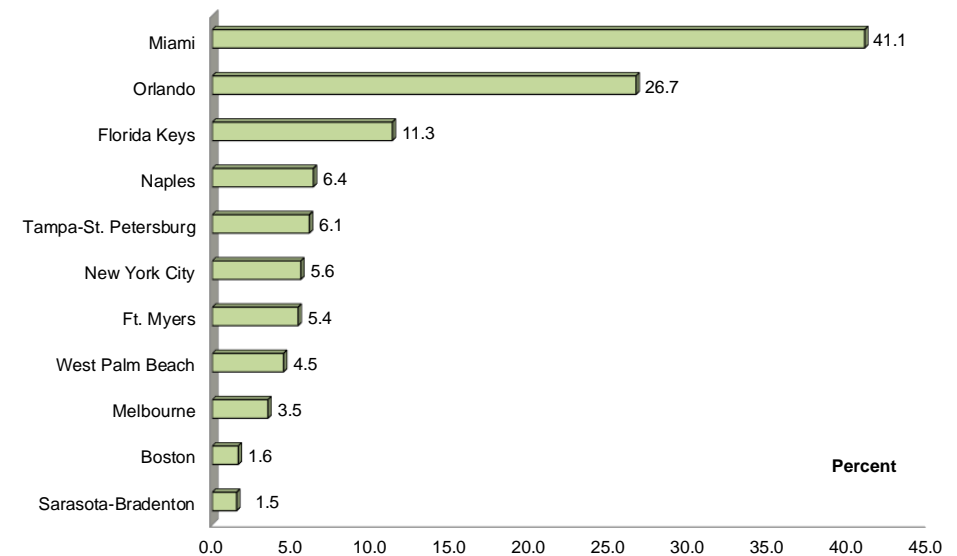# Fort Lauderdale Overseas Visitors 2015 - 2016 Report

## Destinations Visited

- FTL overseas visitors enjoyed spending time in multiple destinations during the overall two week trip in the U.S., with most driving to each destination.

- Half (7.4 nights) of the two week U.S. visit was spent in FTL. The other half of their overall trip was spent exploring other destinations (mostly in Florida).

- On average FTL visitors traveled to a total of 2.8 different destinations. By comparison, the U.S. average is only 2.1 destinations.

- Miami was the most visited city for FTL visitors. Orlando was a distant second, and then the Florida Keys ranked third.

- Other Florida destinations included: Naples, Tampa-St. Petersburg, Fort Myers, West Palm Beach, Melbourne, and Sarasota-Bradenton.

- The only destinations outside of Florida to make the top destinations include New York City and Boston.

- In 2016 the nights spent in FTL increased by nearly 1 additional night. Expanding the stay in FTL by just one additional night will continue to have a significant impact.

**NUMBER OF DESTINATIONS VISITED**
OVERSEAS VISITORS TO FORT LAUDERDALE / U.S.
2016

Ave. Number of Destinations Visited

Percent of visitors visiting only ONE DESTINATION:

U.S. Visitors = 54%
Ft Lauderdale Visitors = 29%

- U.S. Visitors: 2.1
- Fort Lauderdale Visitors: 2.8

**TOP DESTINATIONS VISITED***
OVERSEAS VISITORS TO FORT LAUDERDALE
2016

| Destination | Percent |
| --- | --- |
| Miami | 41.1 |
| Orlando | 26.7 |
| Florida Keys | 11.3 |
| Naples | 6.4 |
| Tampa-St. Petersburg | 6.1 |
| New York City | 5.6 |
| Ft. Myers | 5.4 |
| West Palm Beach | 4.5 |
| Melbourne | 3.5 |
| Boston | 1.6 |
| Sarasota-Bradenton | 1.5 |

Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2016
*=multiple response

# Travel Party Size and Composition

- The average party size for overseas visitors to FTL was 1.7 persons.

- The average party size for adults traveling alone was 1.5 persons. By comparison, the average party size for adults traveling with children was 3.5 persons.

- The majority of overseas visitors traveled alone (55%). By comparison, the U.S. visitor was more likely to travel alone (58%).

- Travel with a spouse/partner (28%) was significantly higher for FTL visitors compared to the U.S. average (22%).

- Travel with family was also strong for FTL at 19% compared to only 16% for the U.S. overall.

- The percent traveling with children was 12% in 2016, down slightly from 13% in 2015.

- Male: 55%; Female: 45%. Male visitor's average age was 46 years old. Female visitor's average age was 41 years old.

55%

28%

12%
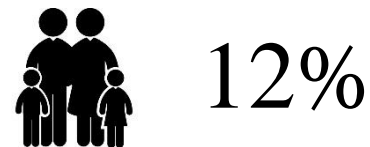
**TRAVEL PARTY COMPOSITION***
OVERSEAS VISITORS TO FORT LAUDERDALE / U.S.
2016

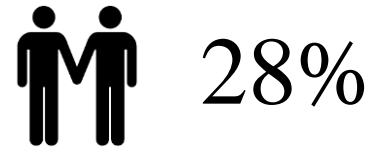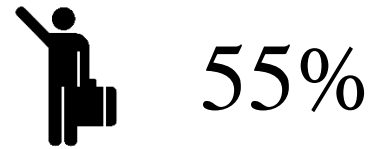| Category | Fort Lauderdale Visitors | U.S. Visitors |
|---|---|---|
| Traveling Alone | 54.6 | 58.3 |
| Spouse/Partner | 28.1 | 22.0 |
| Family/Relatives | 19.0 | 16.0 |
| Friend(s) | 4.0 | 5.8 |
| Business Associate(s) | 1.3 | 2.4 |
| Tour Group | 0.1 | 0.3 |

Percent

Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2016
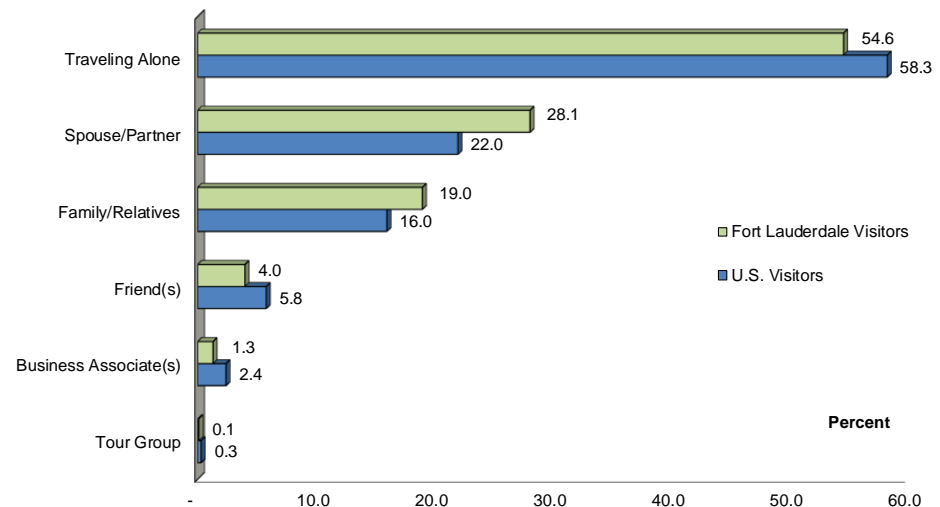* = multiple response

20

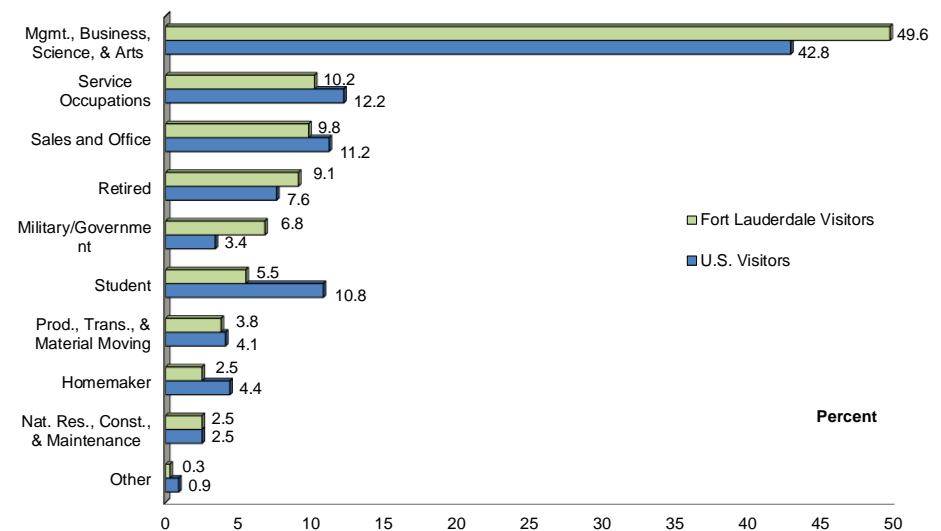# Fort Lauderdale Overseas Visitors 2015 - 2016 Report

## Visitor Characteristics

- Overseas visitors to FTL had an average household income of $78,000 in 2016, nearly on par with the U.S. overseas visitor average.

- Nearly all (93%) have traveled to the U.S. by air prior to their 2016 visit. Only 7% of the 2016 visitors were first time travelers. By comparison, only three quarters (76%) of the U.S. overseas visitors were repeat travelers.

- On average, FTL overseas visitors traveled to the U.S. 2.2 times in 2016 (based on last 12 months). It is safe to say that the FTL visitors is well traveled. However, it also indicates that there is room for growth in attracting first time visitors – which may be more accessible with the additional direct air service.

- Half (50%) of the overseas visitors to FTL were in management, business, science, and arts. By comparison, only 43% of the U.S. visitors had the same occupation.

- FTL registered a higher share of visitors that were in the military/government and retired. In contrast, FTL attracted a smaller share of students and homemakers compared to the U.S. overall.

**FIRST TRIP BY AIR TO THE U.S.**
OVERSEAS VISITORS TO FORT LAUDERDALE / U.S.
2016
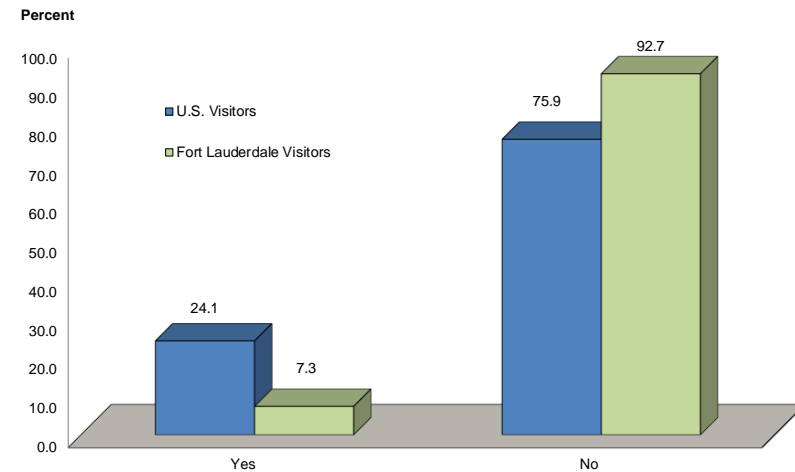


Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2016

**OCCUPATION**
OVERSEAS VISITORS TO FORT LAUDERDALE / U.S.
2016



Source: Travel Market Insights, Survey of International Air Travelers to the United States - 2015

## FTL 2016 Selected Highlights by Market

### 2016 Selected Highlights for Overseas Travelers to Fort Lauderdale

| | Overseas to FTL | Over. Vacation to FTL | Over. to U.S. FLL is POE | Over. Biz/Conv. to FTL | UK/ Ireland to FTL | Germ/ Aust/Swit to FTL | Brazil to FTL | Scan- dinavia to FTL | South America to FTL | Argentina Uruguay to FTL | Colombia to FTL | Ecuador Peru to FTL | Central America to FTL | Bahamas to FTL |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Estimated Arrivals | 1,015,000 | 794,000 | 884,000 | 154,000 | 63,000 | 108,000 | 95,000 | 70,000 | 325,000 | 38,000 | 89,000 | 49,000 | 66,000 | 99,000 |
| Arrivals % Change | 12.5% | 10.0% | 2.4% | 21.3% | -19.2% | 17.4% | -13.6% | 1.4% | 6.6% | -2.6% | 12.7% | 58.1% | 65.0% | -2.0% |
| Market Share | 2.70% | 3.10% | 2.35% | 1.95% | 1.26% | 4.00% | 5.61% | 5.34% | 6.12% | 3.86% | 10.69% | 6.98% | 5.66% | 38.34% |
| Share Shift | 0.35 | 0.32 | 0.10 | 0.42 | -0.20 | 0.96 | 0.65 | 0.47 | 0.72 | -1.05 | 1.39 | 2.24 | 1.95 | -4.75 |
| | | | | | | | | | | | | | | |
| Mean Total Party Size | 1.7 | 1.9 | 1.5 | 1.3 | 1.9 | 2.0 | 1.9 | 2.4 | 1.9 | 2.2 | 1.8 | 1.5 | 1.6 | 1.7 |
| | | | | | | | | | | | | | | |
| Nights in Fort Lauderdale (MEAN) | 7.4 | 7.2 | 10.3* | 7.9 | 7.0 | 6.2 | 6.0 | 6.1 | 8.1 | 6.7 | 9.0 | 8.0 | 6.9 | 3.6 |
| Nights in hotel | 4.8 | 4.7 | 6.3 | 4.9 | 5.1 | 4.0 | 4.6 | 5.1 | 5.3 | 6.5 | 4.8 | 5.4 | 3.9 | 3.2 |
| Stayed in hotel | 65.6% | 68.0% | 60.6% | 64.6% | 80.7% | 82.9% | 76.4% | 80.2% | 60.4% | 78.6% | 44.2% | 47.8% | 60.5% | 69.4% |
| Room-nights | 1,880,019 | 1,335,592 | 2,249,957 | 374,978 | 136,468 | 179,064 | 175,720 | 119,298 | 547,574 | 88,246 | 104,901 | 84,319 | 97,329 | 129,329 |
| Nights in U.S. | 15.4 | 15.7 | 12.5 | 15.6 | 15.3 | 22.0 | 11.9 | 15.1 | 13.8 | 13.5 | 13.3 | 14.2 | 11.2 | 5.6 |
| Fort Lauderdale Share of Nights | 48.1% | 45.9% | 82.4% | 50.6% | 45.8% | 28.2% | 50.4% | 40.4% | 58.7% | 49.6% | 67.7% | 56.3% | 61.6% | 64.3% |
| | | | | | | | | | | | | | | |
| Purpose of Trip: (all purposes) | | | | | | | | | | | | | | |
| Leisure | 78.2% | 100.0% | 70.6% | 28.6% | 84.3% | 93.2% | 85.8% | 90.8% | 84.4% | 89.7% | 79.7% | 81.2% | 60.7% | 66.2% |
| Business | 8.1% | 3.4% | 8.8% | 53.1% | 8.3% | 3.7% | 11.2% | 2.0% | 8.1% | 4.1% | 8.1% | 7.2% | 28.3% | 9.3% |
| VFR | 32.4% | 28.5% | 40.3% | 16.3% | 28.8% | 13.1% | 20.0% | 22.6% | 36.9% | 15.2% | 52.6% | 49.4% | 36.1% | 31.0% |
| Student/Education | 4.5% | 3.6% | 5.2% | 6.9% | 1.0% | 7.7% | 1.5% | 1.3% | 1.8% | - | 1.2% | 6.8% | 2.8% | 8.6% |
| Convention | 8.8% | 2.7% | 5.7% | 58.1% | 3.4% | 3.2% | 4.9% | 0.7% | 4.8% | 4.9% | 4.4% | 1.3% | 11.2% | 7.5% |
| Other | 3.0% | 1.0% | 4.2% | 0.6% | 1.8% | 0.1% | 0.8% | 0.2% | 1.1% | 0.0% | 2.1% | 1.7% | 2.9% | 16.7% |
| | | | | | | | | | | | | | | |
| Car Rental | 62.5% | 67.3% | 46.7% | 51.9% | 55.0% | 91.2% | 73.9% | 73.5% | 66.7% | 73.9% | 57.1% | 62.3% | 59.5% | 72.4% |
| | | | | | | | | | | | | | | |
| Port of Entry: | | | | | | | | | | | | | | |
| Fort Lauderdale | 34.6% | 30.5% | 100.0% | 34.8% | 14.3% | 1.8% | 26.3% | 38.0% | 31.7% | 1.5% | 54.0% | 54.3% | 49.5% | 82.8% |
| Miami | 47.3% | 50.9% | 0.0% | 47.3% | 50.9% | 56.1% | 0.0% | 58.6% | 53.2% | 71.6% | 73.5% | 60.3% | 93.5% | 43.3% |
| Florida Main Destination | 92.1% | 93.1% | 83.6% | 82.6% | 91.7% | 87.6% | 95.3% | 97.0% | 94.1% | 94.7% | 94.1% | 94.2% | 99.4% | 93.0% |

* Nights in USA

# Fort Lauderdale Overseas Visitors 2015 - 2016 Report

## FTL 2015 Selected Highlights by Market

### 2015 Selected Highlights for Overseas Travelers to Fort Lauderdale

| | Overseas to FTL | Over. Vacation to FTL | Over. to U.S. FLL is POE | Over. Biz/Conv. to FTL | UK/ Ireland to FTL | Germ/ Aust/Swit to FTL | Brazil to FTL | Scan- dinavia to FTL | South America to FTL | Argentina Uruguay to FTL | Colombia to FTL | Ecuador Peru to FTL | Central America to FTL | Bahamas to FTL |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Estimated Arrivals | 902,000 | 722,000 | 863,000 | 127,000 | 78,000 | 92,000 | 110,000 | 69,000 | 305,000 | 39,000 | 79,000 | 31,000 | 40,000 | 101,000 |
| Market Share | 2.35% | 2.77% | 2.25% | 1.53% | 1.46% | 3.04% | 4.96% | 4.87% | 5.40% | 4.91% | 9.30% | 4.74% | 3.71% | 43.09% |
| | | | | | | | | | | | | | | |
| Mean Total Party Size | 1.8 | 2.1 | 1.7 | 1.3 | 1.9 | 2.1 | 2.1 | 2.4 | 2.0 | 2.0 | 2.0 | 1.5 | 1.6 | 1.9 |
| | | | | | | | | | | | | | | |
| Nights in Fort Lauderdale (MEAN) | 6.5 | 6.3 | 12.7* | 5.2 | 7.0 | 6.0 | 5.4 | 7.0 | 8.0 | 6.2 | 8.5 | 9.7 | 7.5 | 4.8 |
| Nights in hotel | 4.8 | 4.7 | 8.5 | 4.7 | 5.1 | 3.8 | 4.2 | 7.0 | 4.7 | 4.7 | 4.8 | 4.7 | 3.6 | 4.7 |
| Stayed in hotel | 65.1% | 67.8% | 59.0% | 71.4% | 79.2% | 83.7% | 77.4% | 84.5% | 59.6% | 69.0% | 44.4% | 40.3% | 65.4% | 75.6% |
| Room-nights | 1,565,872 | 1,095,583 | 2,545,850 | 327,836 | 165,820 | 139,341 | 170,280 | 170,056 | 427,183 | 63,239 | 84,182 | 39,145 | 58,860 | 188,881 |
| Nights in U.S. | 15.1 | 13.9 | 13.9 | 16.7 | 13.7 | 15.4 | 11.9 | 17.3 | 14.1 | 14.9 | 13.2 | 13.6 | 10.4 | 7.5 |
| Fort Lauderdale Share of Nights | 43.0% | 45.3% | 91.4% | 31.1% | 51.1% | 39.0% | 45.4% | 40.5% | 56.7% | 41.6% | 64.4% | 71.3% | 72.1% | 64.0% |
| | | | | | | | | | | | | | | |
| Purpose of Trip (all Purposes): | | | | | | | | | | | | | | |
| Leisure | 80.0% | 100.0% | 73.8% | 30.8% | 84.0% | 92.6% | 84.0% | 92.8% | 83.7% | 87.1% | 80.5% | 87.0% | 70.9% | 77.6% |
| Business | 10.2% | 2.6% | 8.5% | 72.8% | 8.3% | 5.4% | 13.1% | 2.3% | 9.7% | 8.1% | 6.0% | 6.5% | 28.1% | 9.6% |
| VFR | 33.5% | 29.9% | 41.8% | 13.5% | 24.8% | 17.3% | 19.9% | 23.0% | 36.8% | 21.0% | 53.6% | 58.1% | 45.2% | 32.2% |
| Student/Education | 2.7% | 1.1% | 3.2% | 8.0% | 1.0% | 2.0% | 1.5% | 0.7% | 1.9% | - | 4.6% | - | 2.9% | 1.4% |
| Convention | 4.8% | 3.0% | 2.2% | 34.4% | 3.3% | 6.2% | 4.0% | 6.8% | 3.7% | 5.5% | 3.6% | - | 4.8% | 3.1% |
| Other | 2.3% | 0.8% | 2.6% | 2.4% | 3.4% | 0.2% | 0.9% | 0.2% | 1.7% | 0.0% | 3.9% | 0.0% | 1.3% | 14.4% |
| | | | | | | | | | | | | | | |
| Car Rental | 63.1% | 68.3% | 49.7% | 58.6% | 53.0% | 89.2% | 78.9% | 76.7% | 68.2% | 68.2% | 61.2% | 57.6% | 52.6% | 71.7% |
| | | | | | | | | | | | | | | |
| Port of Entry: | | | | | | | | | | | | | | |
| Fort Lauderdale | 32.4% | 31.2% | 100.0% | 25.6% | 13.3% | 4.8% | 17.0% | 42.7% | 24.5% | 2.0% | 49.9% | 41.9% | 36.3% | 79.9% |
| Miami | 47.6% | 48.5% | - | 56.4% | 48.9% | 70.9% | 70.2% | 24.7% | 66.4% | 91.9% | 44.7% | 57.3% | 58.6% | 6.1% |
| Florida Main Destination | 94.9% | 94.7% | 86.1% | 90.7% | 84.3% | 95.4% | 94.3% | 86.8% | 95.7% | 97.9% | 97.5% | 98.5% | 95.8% | 99.5% |

* Nights in USA
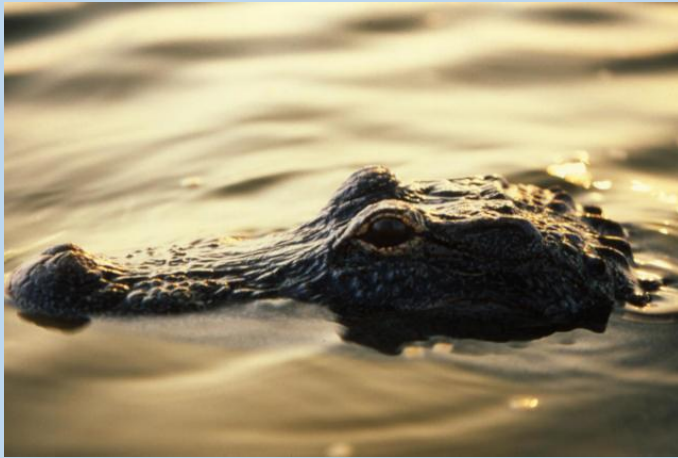
# Visitor Universe (South Florida)

## The Overseas Visitor Universe

Visitation to South Florida is covered in this section of the report.  The South Florida visitor metrics were develop to understand the potential universe of overseas visitors that "could" be hosted for an overnight stay in FTL.

South Florida Visitor Definition

All references to 'South Florida' in this report will represent the following definition. All overseas visitors that stayed overnight in any of the following destinations (see table below) were counted as a visitor to South Florida.  The South Florida visitors are a sub-set that <u>excludes visitors that only visited Miami and no other destination in South Florida</u>.

Miami only visitors have been excluded to highlight the universe of travelers that were interested in visiting destinations beyond Miami in South Florida.  The Miami only visitors have been removed given they are less likely to stay in FTL overnight. In contrast, the visitors that traveled beyond Miami are more likely to stay overnight in FTL.

In addition, the broader South Florida definition provides a stronger visitor sample and allows for analysis of additional markets that are not currently mature for FTL (based on larger samples).

| South Florida Destination Visited (multiple responses) |
|---|
| Cape Coral-Fort Myers, FL (MSA) |
| Fort Lauderdale-Pompano Beach-Deerfield Beach, FL (MD) |
| Key West, FL (MSA) |
| Miami-Miami Beach-Kendall, FL (MD) |
| Naples-Marco Island, FL (MSA) |
| North Port-Bradenton-Sarasota, FL (MSA) |
| Port St. Lucie, FL (MSA) |
| Punta Gorda, FL (MSA) |
| West Palm Beach-Boca Raton-Boynton Beach, FL (MD) |
| MSA = Metropolitan Statistical Area.  MD = Metropolitan Division |

This data provides:
1.  Visitation estimates by country that stayed overnight in South Florida (excluding Miami only visitors).

2.  Select country-specific visitor characteristics for potential visitor markets.

As FTL expands its efforts into potential new markets and more visitors discover FTL, analysis of these visitors will be converted to profile FTL visitors.  For example, currently China is a small market for FTL.  In this data set the "potential" size of the Chinese visitor pool is defined and profiled so that FTL can expand its share of the Chinese visitors.

# Fort Lauderdale Overseas Visitors 2015 - 2016 Report

## South Florida Overseas Visitor Arrivals

| Regional Origins of Overnight Visitors to South Florida | | | |
|---|---|---|---|
| | 2015 | 2016 | % Change 2016/2015 |
| All Overseas | 4,407,000 | 4,413,000 | 0.1% |
| Latin America | 2,492,000 | 2,458,000 | -1.4% |
| South America | 1,826,000 | 1,688,000 | -7.6% |
| Caribbean | 337,000 | 433,000 | 28.5% |
| Central America | 181,000 | 209,000 | 15.5% |
| Mexico Air | 148,000 | 128,000 | -13.5% |
| Europe | 1,659,000 | 1,651,000 | -0.5% |
| Other Regions Sum | 358,000 | 408,000 | 14.0% |
| Asia | 171,000 | 183,000 | 7.0% |
| Middle East | 80,000 | 110,000 | 37.5% |
| Oceania | 86,000 | 88,000 | 2.3% |
| Africa | 21,000 | 27,000 | 28.6% |
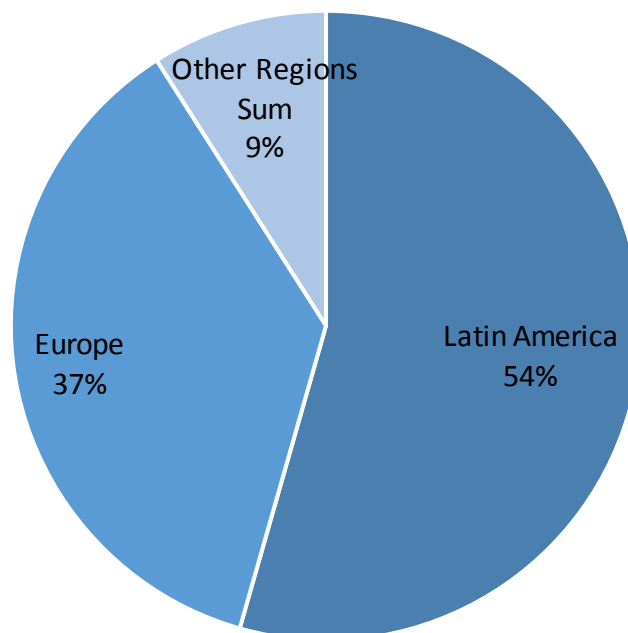
- In 2016 4.4 million overseas residents visited South Florida (overnight). Visits were up slightly up (0.1%), nearly on par with 2015. By comparison, FTL overseas visits increased 16%, indicating that FTL outperformed South Florida in hosting overseas visitors in 2016.

- The world regions with the strongest growth to South Florida were from a combination of some traditional and non-traditional regions.

- Latin America was down primarily due to a decline from South America and Mexico (air). In contrast both the Caribbean and Central America registered strong visitor growth for FTL in 2016.

- European visitors to South Florida declined slightly at -0.5% in 2016 compared to 2015.

- In contrast the "Other Regions Sum" of 408,000 visitors grew 14% in 2016 over 2015. The growth was from all four of the other world regions, with the Middle East registering the strongest growth.

# Fort Lauderdale Overseas Visitors 2015 - 2016 Report

Top South Florida Overnight Visitor Markets from Overseas Countries

| | Top South Florida Overnight Visitors from Overseas Countries | | |
|---|---|---|---|
| | **2015** | **2016** | **% Change 2016/2015** |
| All Overseas | 4,407,000 | 4,413,000 | 0.1% |
| 1 Brazil | 641,000 | 402,000 | -37.3% |
| 2 United Kingdom | 395,000 | 396,000 | 0.3% |
| 3 Argentina | 339,000 | 365,000 | 7.7% |
| 4 Germany | 332,000 | 331,000 | -0.3% |
| 5 Colombia | 301,000 | 323,000 | 7.3% |
| 6 Venezuela | 168,000 | 184,000 | 9.5% |
| 7 Ecuador | 142,000 | 158,000 | 11.3% |
| 8 France | 181,000 | 147,000 | -18.8% |
| 9 Bahamas | 111,000 | 125,000 | 12.6% |
| 10 Chile | 84,000 | 103,000 | 22.6% |
| 11 Spain | 80,000 | 96,000 | 20.0% |
| 12 Italy | 108,000 | 96,000 | -11.1% |
| 13 Sweden | 94,000 | 93,000 | -1.1% |
| 14 Netherlands | 88,000 | 92,000 | 4.5% |
| 15 P.R.C. | 84,000 | 86,000 | 2.4% |
| 16 Australia / NZ | 86,000 | 88,000 | 2.3% |
| 17 Switzerland | 91,000 | 84,000 | -7.7% |
| 18 Peru | 78,000 | 73,000 | -6.4% |
| 19 Jamaica | 53,000 | 64,000 | 20.8% |
| 20 Honduras | 42,000 | 63,000 | 50.0% |

- The top 20 markets accounted for over three quarters (76%) of the 2016 overseas visitors to South Florida.

- Visits from the top 20 markets to South Florida declined -4% in 2016 compared to 2015.

## South Florida 2016 Selected Highlights by Market

### 2016 Selected Highlights for Overseas Travelers to South Florida

| | Overseas to S. FL | Mexico to S. FL | France to S. FL | Spain to S. FL | Chile to S. FL | China to S. FL | India to S. FL | Middle East to S. FL | Australia NZ to S. FL |
|---|---|---|---|---|---|---|---|---|---|
| Estimated Arrivals | 4,413,000 | 128,000 | 147,000 | 96,000 | 103,000 | 86,000 | 37,000 | 110,000 | 88,000 |
| Arrivals % Change | 0.1% | -13.5% | -18.8% | 20.0% | 22.6% | 2.4% | 23.3% | 37.5% | 2.3% |
| Market Share | 11.74% | 5.03% | 9.05% | 11.99% | 30.31% | 2.90% | 3.13% | 8.45% | 5.37% |
| Share Shift | 0.26 | -0.57 | -1.28 | 1.35 | 3.13 | -0.35 | 0.46 | 2.47 | 0.44 |
| | | | | | | | | | |
| Mean Total Party Size | 2.0 | 1.8 | 2.0 | 1.8 | 2.2 | 1.9 | 1.6 | 1.7 | 1.9 |
| | | | | | | | | | |
| Nights in South Florida (MEAN) | 8.5 | 7.0 | 12.7 | 10.0 | 7.1 | 10.8 | 5.0 | 8.7 | 8.7 |
| Nights in hotel | 6.5 | 3.4 | 7.1 | 7.1 | 6.3 | 12.1 | 5.0 | 6.7 | 8.1 |
| Stayed in hotel | 72.7% | 71.2% | 78.2% | 72.5% | 78.0% | 77.5% | 74.8% | 66.7% | 84.6% |
| Room-nights | 10,426,816 | 172,146 | 408,087 | 274,533 | 230,065 | 424,455 | 86,488 | 289,164 | 317,384 |
| Nights in U.S. | 18.6 | 16.3 | 23.5 | 24.7 | 14.9 | 32.2 | 38.3 | 23.3 | 26.9 |
| South Florida Share of Nights | 45.7% | 42.9% | 54.0% | 40.5% | 47.7% | 33.5% | 13.1% | 37.3% | 32.3% |
| | | | | | | | | | |
| Purpose of Trip (all purposes): | | | | | | | | | |
| Leisure | 84.4% | 67.9% | 88.3% | 79.5% | 90.8% | 66.1% | 58.5% | 76.8% | 87.9% |
| Business | 7.4% | 18.2% | 8.3% | 14.4% | 9.7% | 22.5% | 25.2% | 13.4% | 4.8% |
| VFR | 28.1% | 29.2% | 24.8% | 30.7% | 25.2% | 37.4% | 30.2% | 33.6% | 31.0% |
| Student/Education | 4.7% | 10.2% | 5.1% | 6.0% | 3.8% | 15.5% | 14.0% | 2.7% | 4.1% |
| Convention | 6.1% | 12.0% | 4.4% | 2.8% | 8.3% | 7.8% | 27.6% | 8.6% | 4.6% |
| Other | 2.4% | 6.1% | 0.0% | 1.4% | 1.5% | 0.6% | 7.2% | 0.8% | 0.6% |
| | | | | | | | | | |
| Car Rental | 62.4% | 46.7% | 75.4% | 62.0% | 63.7% | 55.6% | 15.8% | 57.3% | 34.8% |
| | | | | | | | | | |
| Port of Entry: | | | | | | | | | |
| Fort Lauderdale | 12.1% | 22.1% | 0.6% | 1.6% | 0.4% | na | na | na | 1.6% |
| Miami | 67.2% | 45.0% | 49.6% | 67.9% | 30.2% | 43.7% | 43.0% | 6.3% | 16.7% |
| Florida Main Destination | 86.0% | 78.9% | 84.6% | 80.2% | 90.3% | 46.6% | 50.0% | 62.8% | 63.7% |

na = data not available.

# Fort Lauderdale Overseas Visitors 2015 - 2016 Report

## South Florida 2015 Selected Highlights by Market

| 2015 Selected Highlights for Overseas Travelers to South Florida | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| | Overseas to S. FL | Mexico to S. FL | France to S. FL | Spain to S. FL | Chile to S. FL | China to S. FL | India to S. FL | Middle East to S. FL | Australia NZ to S. FL |
| Estimated Arrivals | 4,407,000 | 148,000 | 181,000 | 80,000 | 84,000 | 84,000 | 30,000 | 80,000 | 86,000 |
| Market Share | 11.48% | 5.60% | 10.33% | 10.64% | 27.18% | 3.25% | 2.67% | 5.98% | 4.93% |
| | | | | | | | | | |
| Mean Total Party Size | 2.1 | 2.0 | 2.0 | 1.8 | 2.4 | 2.0 | 1.5 | 1.5 | 1.8 |
| | | | | | | | | | |
| Nights in South Florida (MEAN) | 7.9 | 5.6 | 9.4 | 9.9 | 6.5 | 9.3 | 4.7 | 8.6 | 6.2 |
| Nights in hotel | 5.8 | 3.3 | 7.2 | 5.9 | 5.3 | 8.6 | 4.1 | 6.6 | 5.1 |
| Stayed in hotel | 72.6% | 75.3% | 76.9% | 72.1% | 80.8% | 83.2% | 70.0% | 49.7% | 90.1% |
| Room-nights | 13,264,020 | 183,883 | 501,080 | 189,062 | 149,884 | 300,518 | 57,400 | 174,944 | 232,308 |
| Nights in U.S. | 17.5 | 15.8 | 23.0 | 23.6 | 14.3 | 30.0 | 30.7 | 30.1 | 26.7 |
| South Florida Share of Nights | 45.1% | 35.4% | 40.9% | 41.9% | 45.5% | 31.0% | 15.3% | 28.6% | 23.2% |
| | | | | | | | | | |
| Purpose of Trip (all purposes): | | | | | | | | | |
| Leisure | 86.0% | 71.4% | 82.9% | 76.9% | 89.2% | 71.9% | 58.3% | 68.1% | 89.6% |
| Business | 7.9% | 23.0% | 9.4% | 18.8% | 9.5% | 16.6% | 28.2% | 16.4% | 4.2% |
| VFR | 26.9% | 38.2% | 26.7% | 24.1% | 22.4% | 50.2% | 35.8% | 43.1% | 26.8% |
| Student/Education | 3.0% | 4.4% | 4.1% | 6.6% | 2.0% | 10.1% | 4.8% | 7.4% | 5.4% |
| Convention | 4.8% | 3.7% | 4.0% | 4.4% | 9.5% | 10.7% | 14.4% | 14.4% | 3.0% |
| Other | 1.4% | 5.3% | 1.0% | 0.0% | 0.6% | 0.0% | 3.8% | 1.2% | 3.8% |
| | | | | | | | | | |
| Car Rental | 66.1% | 50.6% | 71.7% | 55.1% | 66.8% | 62.6% | 19.2% | 43.0% | 37.8% |
| | | | | | | | | | |
| Port of Entry: | | | | | | | | | |
| Fort Lauderdale | 10.6% | 16.8% | 1.0% | 1.9% | 0.1% | na | na | na | 1.1% |
| Miami | 57.0% | 57.7% | 72.6% | 72.7% | 91.0% | 4.8% | 22.0% | 24.7% | 7.1% |
| Florida Main Destination | 86.7% | 80.5% | 80.2% | 71.1% | 88.6% | 34.7% | 54.7% | 47.9% | 50.9% |

na = data not available.

Produced by Travel Market Insights Inc.
www.Travelmi.com