

# *Greater Fort Lauderdale YE 2017 Visitor Profile*

*INSIGHTS  
THAT TAKE  
YOU  
PLACES*

**DKSHIFFLET**

## Year-End 2017 Visitor Profile.

*An Inside Look at the Travel Market in  
Greater Fort Lauderdale*

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The report you are about to read is a comprehensive analysis of the travel market in the U.S. and Fort Lauderdale. After reviewing this report, it is DKSA's intention for travel marketers and planners to be better armed with the intelligence they need to develop tourism marketing strategies that will attract new visitors and provide a travel experience that will earn repeat visits and referrals.

*Fort Lauderdale continues to attract high value visitors from its key origin markets*

This Fort Lauderdale Visitor Study provides intelligence on U.S. and Overnight Leisure travel trends from 2017. Volume and profile data are from D. K. Shifflet & Associate's **PERFORMANCE/Monitor<sup>SM</sup>** Travel Intelligence System<sup>SM</sup> — the largest travel-tracking system in the U.S. The 2017 Fort Lauderdale visitor profile is based on households traveling to Fort Lauderdale. Appendix A contains details on study methodology and definitions of terms such as Person-Stays and Person-Days.

## Executive Summary

This report, like previous reports, studies Fort Lauderdale domestic travel compared to the U.S. Data are also analyzed for the following segments – Fort Lauderdale Overnight Leisure, Fort Lauderdale Non-Resident Overnight Leisure, Fort Lauderdale Resident Overnight Leisure, Fort Lauderdale Overnight Leisure Vacation (Getaway Weekend/General Vacation), Fort Lauderdale Overnight Leisure Non-Vacation (Visit Friends/Relatives, Special Event, Other Personal), Miami (Dade County), and Fort Lauderdale Overnight Business.

### 2017 Highlights:

- Overall share of visitation continues to grow
- Boomers and GenXers are the dominant generations of visitors
- Florida, New York, and California are the largest origin markets
- Spring and Winter are the dominant travel seasons
- One Adult and Couple travel parties are most dominant
- Fort Lauderdale hosted visitors for an average of 3.87 nights
- Daily per person spending is at \$150 (including transportation)
- Beach/Waterfront, Visit Friends/Relatives, Culinary/Dining, Shopping, Nightlife, Gambling, and Touring/Sightseeing are some of the most popular activities

#### STUDY SPECIFICATIONS

**Travel definition:** An overnight trip or any day-trip greater than 50 miles one-way from home.

**Sample Frame:** All U.S. domestic travelers during 2016 to Fort Lauderdale

## Total Visitor Volume: Greater Fort Lauderdale

### Record-high Fort Lauderdale visitation in 2017

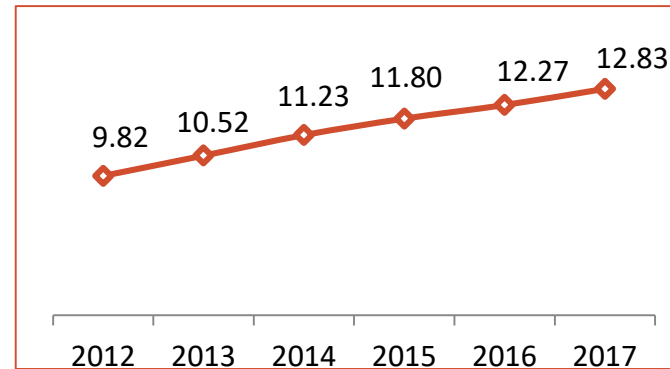
Visitation has been growing steadily since 2012. This year marks another record-high for Fort Lauderdale, which hosts more than 12.83 million domestic Business and Leisure travelers, growth was nearly 1% when compared to 2016.

### Leisure Travel drives Fort Lauderdale's volume gains

Leisure domestic visitation continues its growth from 2012. Business travel is flat when compared to 2016. Leisure growth is up from 4.7% in 2016 to 5.4% in 2017.

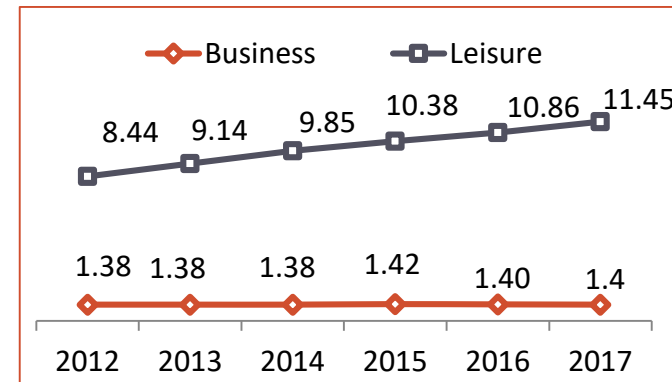
### Total Visitation (Business + Leisure)

FORT LAUDERDALE PERSON-STAYS (MILLIONS) 2012-2017



### Visitation by Travel Segment

FORT LAUDERDALE PERSON-STAYS (MILLIONS)



Traveler volume continued to grow in 2017

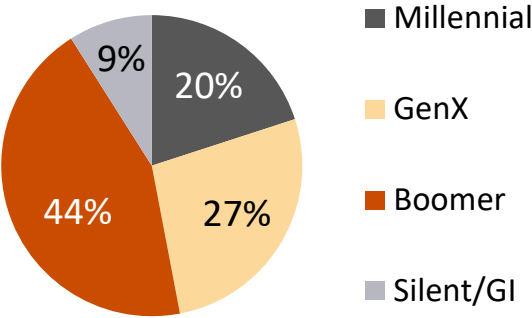
# Demographics: Generations

Boomers remain the dominant generation overall Leisure visitation as well as across all segments, although their share of visitation has fallen slightly, with Millennial and GenX visitors on the rise. GenXers provide the highest average spending by generation, with an average party-per-stay spend of \$1,493, ahead of Boomers at \$1,178. Generationally, the Boomer and GenX visitors are the most profitable. In the short-term, GenXers have the most growth potential followed by Millennials.

Generation	Birth Years
Millennial	1981 and after
Gen X	1965-1980
Boomer	1946-1964
Silent	1930-1945
G.I.	1929 and earlier

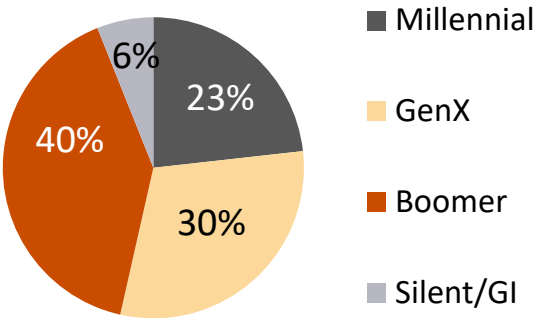
## Fort Lauderdale Leisure by Generation

LEISURE PERSON-STAYS % SHARE



## Fort Lauderdale FL Non-Res Leisure - Generation

LEISURE PERSON-STAYS % SHARE



Boomers continue to contribute a higher share of visitation in Fort Lauderdale when compared to the U.S.

### GLOSSARY

**Person-Stays** : the total number of people who visited your destination, regardless of how long they stayed

# Lifestage Segmentation

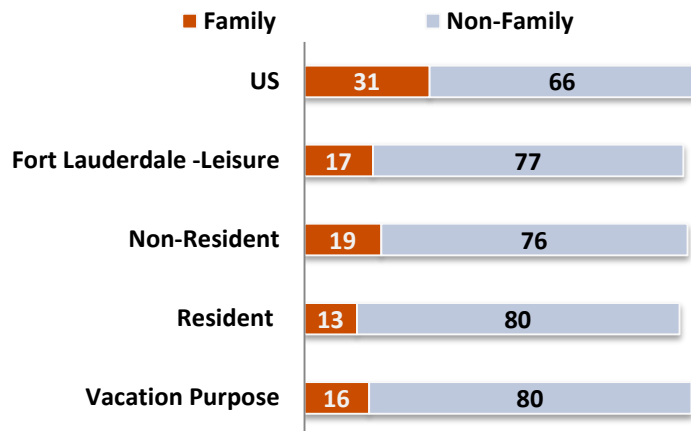
DK Shifflet combines the three variables most likely to differentiate between travelers to create seven Lifestages. Generally, Fort Lauderdale hosts more “Non-Family” travelers, or travelers that do not have children their households, than the typical U.S. leisure destination. Affluent Mature and Maturing & Free contribute the greatest share of travel. Maturing & Free travelers represent the largest Party-per-Stay spending of any Lifestage at \$1,608, slightly ahead of Affluent Family at \$1,458.

## DK Shifflet Lifestage Definitions

Lifestage	Age of HoH	HH Income	Children <18 in HH
Young & Free	18-34	Any	No
Young Family	18-34	Any	Yes
Mature & Free	35-54	Any	No
Moderate Family	35-54	Under \$75K	Yes
Affluent Family	35-54	\$75K+	Yes
Moderate Mature	55+	Under \$60K	No
Affluent Mature	55+	\$60K+	No

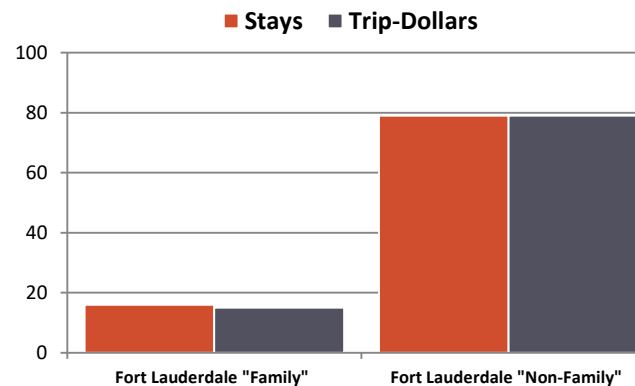
## Lifestage Share

2017 TOTAL LEISURE PERSON-STAYS



## Lifestage Stays and Trip Dollars

TOTAL LEISURE (2015-2017)



**Affluent Lifestages account for over one-third of the Leisure spending in Fort Lauderdale**

## GLOSSARY

**Person-Stays** : the total number of people who visited your destination, regardless of how long they stayed

**Stays**: represent the number of distinct groups of travelers (travel parties) and the number of destinations they visited on a trip, regardless of the number of people within the travel group.

**Trip-Dollars** (Direct Spending) monetary worth/contribution of travelers to a destination's economy as opposed to the contribution of number of trips or number of days spent at the destination

## Where do Fort Lauderdale's visitors come from?

About 13% of Fort Lauderdale Leisure Person-Stays originated from New York state this year, followed by California, Ohio and New Jersey. When looking at DMAs, New York ranks first at 15.5% for Non-Resident Leisure purposes, followed by Indianapolis, San Francisco-Oakland-San Jose, Atlanta and Cleveland.

The average one-way distance traveled for Leisure to Fort Lauderdale is 1,142 miles in 2015, up from 1,118 miles the previous year.

## Fort Lauderdale Origin States

2016-2017 NON-RESIDENT LEISURE PERSON-STAYS

New York	12.7%
California	7.5%
New Jersey	7.4%
Indiana	7.1%
Ohio	6.4%
Massachusetts	4.7%

## Fort Lauderdale Origin DMAs

2016-2017 NON-RESIDENT LEISURE PERSON-STAYS

New York, NY	15.5%
Indianapolis, IN	5.7%
San Francisco, CA	5.3%
Atlanta, GA	4.2%
Cleveland, OH	4.2%
Boston, MA	3.6%
Philadelphia, PA	3.5%

## Fort Lauderdale Origin DMAs

2016-2017 RESIDENT LEISURE PERSON-STAYS

Miami-Fort Lauderdale	24.5%
Tampa-St. Petersburg	22.5%
West Palm Beach	20.6%
Orlando-Daytona Beach	15.3%
Fort Meyers-Naples	7.7%
Jacksonville, FL	6.4%
Gainesville, FL	2.2%

**The New York DMA provides 15.5% of Non-Resident Leisure visitation**



## Party Composition

### Who makes up the average Travel Party?

Party size is down slightly (1.86 people) in 2017 when compared to 2016 (1.88 people). This can be attributed to a trade off between the growth of M/F couples and the decline of family travel parties. One Male and One Female travel parties represent the highest share of visitation and the highest share of spending of Overnight Leisure travel to Fort Lauderdale.

M/F couples represent 43% of visitation and the highest spending at \$1,466 per visit. Parties of 3 Adults or more spend \$1,465 on average for their leisure trip.

### Fort Lauderdale Travel Party Composition

#### LEISURE STAYS



Solo Travelers make up 36% of Fort Lauderdale Stays and an average spend per stay of \$623, higher than the US avg.



Two-Adult Parties are 49% of Leisure visits. These are predominantly (42%) One Male + One Female parties



Three+ Adult Groups account for 7% of Fort Lauderdale Overnight Leisure Stays



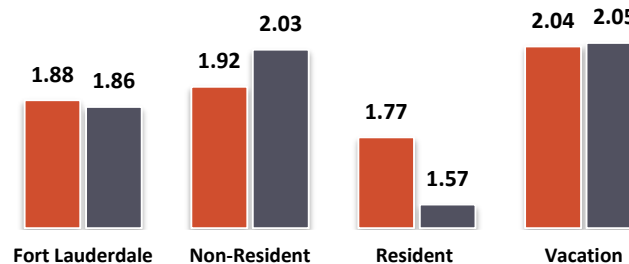
About 8% of Travel Parties include children, down from 10%. These parties spend an average of \$1,328 per stay

### Average Fort Lauderdale Party Size

#### LEISURE STAYS

■ 2015-2016

■ 2016-2017



MM/FF travel parties spend the most by Party Composition, spending an average of \$1,569 per stay but only represent 7% of visitation.

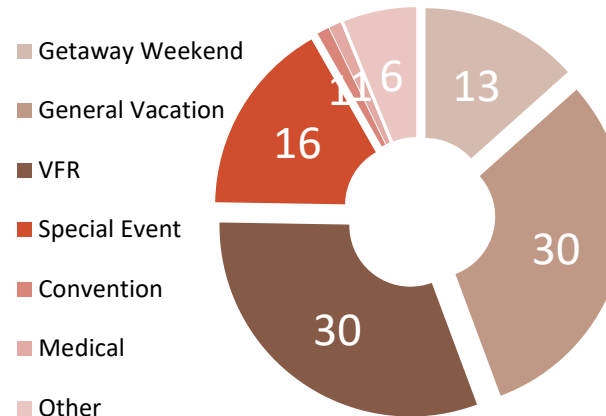
# Travel Purpose

## Why do travelers visit Fort Lauderdale?

Approximately 57% of GFL's Leisure visitors travel for a non-vacation purpose, predominantly to Visit a Friend or Relative (34%). 43% travel for Vacation related purposes Getaway Weekends (13%) and General Vacations (30%). Vacation Leisure visitors bring in \$1,568 on average for each Overnight Leisure visit to Fort Lauderdale whereas Non-Vacation visitors spend on average \$913.

## Fort Lauderdale Travel Purpose

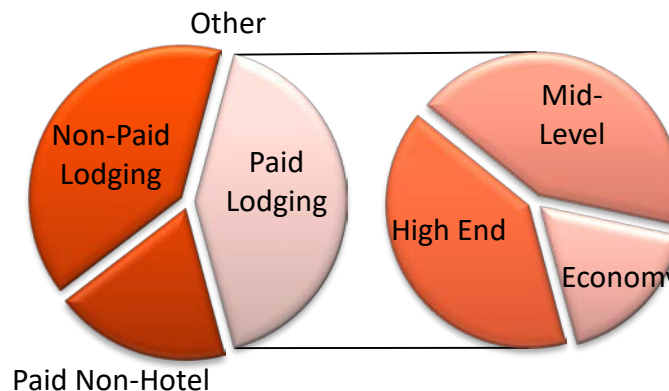
SHARE OF 2016-2017 LEISURE PERSON-STAYS



## Where do Fort Lauderdale visitors stay?

2016-2017 OVERNIGHT LEISURE PERSON-STAYS

Hotel accounts for about 44% of Fort Lauderdale's Overnight Leisure (ONL) Person-Stays, lower than the US average. Paid accommodations not in a hotel jumped to 18% among ONL visitors in 2017. About 38% of ONL visitors stay in a private home, slightly above the U.S. average at 35%.



**Visitors staying in paid non- hotels have an average party-per-stay spending of \$1,622. Those staying in paid hotels have an average spending of \$1,346.**

# Traveler Activities

## Top 5 Activities of Overnight Leisure Parties:

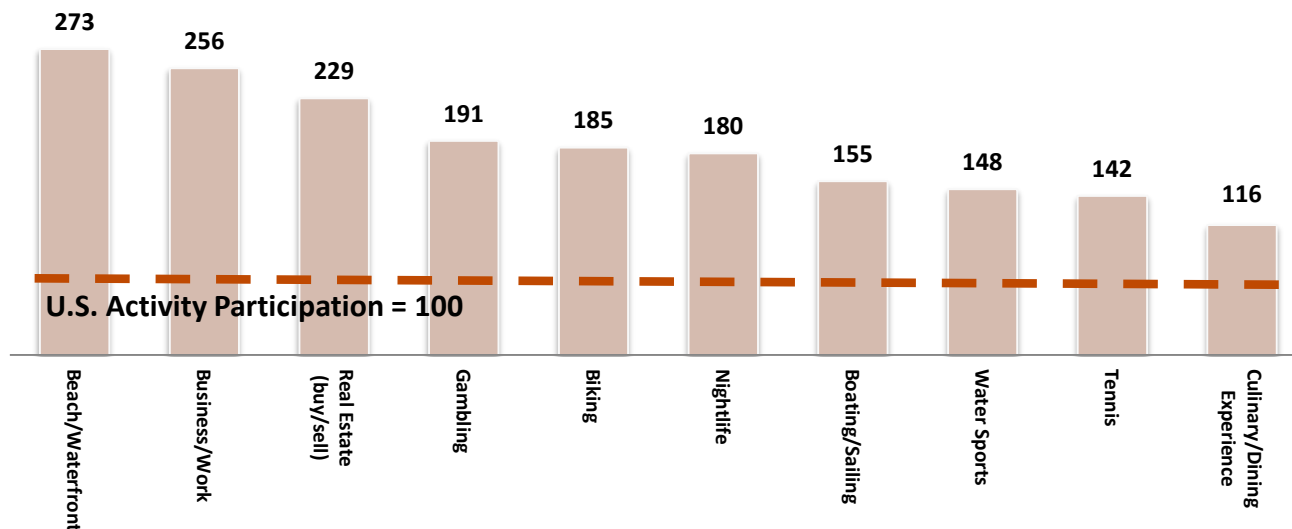
1. Beach/Waterfront (44% of Leisure Stays)
2. VFR (39% of Leisure Stays)
3. Culinary/Dining (33% of Leisure Stays)
4. Shopping (27% of Leisure Stays)
5. Nightlife (20% of Leisure Stays)

## What are Fort Lauderdale's standout activities?

When indexed to the U.S. average activity participation, travelers to Fort Lauderdale show a strong preference for Beach/Waterfront, Business/Work, Real Estate, Gambling, Biking and Nightlife when visiting.

## The Activity Index

2016-2017 LEISURE STAYS



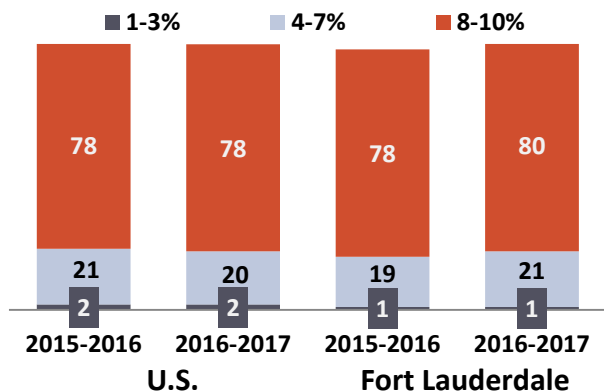
Beach/Waterfront, Business/Work, Real Estate, and Gambling related activities are the most popular activities among Overnight Leisure Visitors

## How do Visitors Rate their Experience?

Respondents are asked to rate their experience in two key domains: Satisfaction and Value. Ratings are on a 10-point scale, where 1 is low or 'poor' and 10 is 'excellent'. Fort Lauderdale tracks well on visitor satisfaction, with a small increase over last year in this dimension. The average satisfaction score is 8.58/10 this year, last year it was 8.49/10.

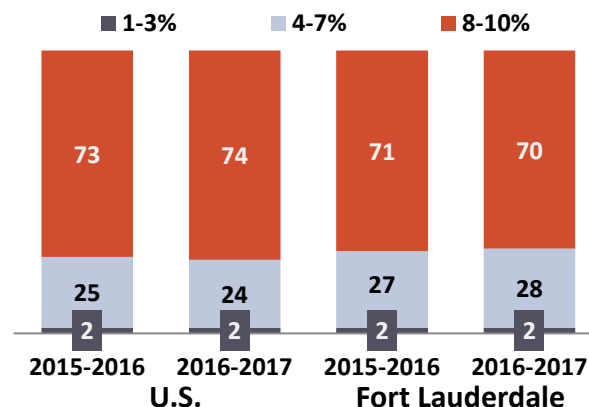
## Satisfaction Ratings

LEISURE PERSON-STAYS (%)



## Value Ratings

LEISURE PERSON-STAYS (%)



Value ratings for Fort Lauderdale was flat at 8.19/10 compared to 2016. About 70% of visitors provided a top-box score in the Value dimension for 2016.

**Fort Lauderdale is slightly lower than the U.S. average in Value slightly and is at parity with the average leisure destination in Satisfaction.**

# Weights & Definitions

REFERENCE

<b>Stays or Travel Parties</b>	Stays represent the number of distinct groups of travelers (travel parties or groups) and the number of destinations they visited on a trip, regardless of the number of people within the travel group.
<b>Person-Stays</b>	(Number of Visitors) The total number of people that traveled to your destination, regardless of the length of their stay.
<b>Person-Days</b>	(Number of Visitor-Days) The total number of days that all visitors contributed to your destination.
<b>Trip-Dollars</b>	(Direct Spending) Using the Trip-Dollars weight shows the monetary worth/contribution of travelers to a destination's economy as opposed to the contribution of number of trips or number of days spent at the destination.
<b>Trip Expenditures</b>	combines per-person spending with Person-Days to calculate the money spent on each trip to your destination.
<b>Lifestage</b>	Lifestage analysis combines three variables - age, household income, and presence of children in the household - into one variable containing seven mutually-exclusive segments defined above. Because of the age component, the lifestage segments are "moving targets" from year to year.

# Lifestage and Generation Definitions

REFERENCE

DKSA combines the three variables most likely to discriminate between travelers into seven Lifestages. These include age, household income and whether or not children are present in the household. These segments are generally used for promotion development and targeting. For Fort Lauderdale, visitors are more likely to belong to Lifestages with no children in the household. It is important to notice, however that these Lifestages are the least profitable for the County. The combined family Lifestages are the most profitable, especially those visitors who represent Moderate Family and Affluent Family. The challenge remains is to how best attract these visitors.

Lifestage	Head of HH Age (years)	HH Income	Children <18 in HH
Young & Free	18-34	Not Used	No
Young Family	18-34	Not Used	Yes
Mature & Free	35-54	Not Used	No
Moderate Family	35-54	Under \$75K	Yes
Affluent Family	35-54	\$75K+	Yes
Moderate Mature	55+	Under \$60K	No
Affluent Mature	55+	\$60K+	No

Generation	Year of Birth
Millennial	1984-2002
GenX	1965-1983
Boomer	1946-1964
Silent	1927-1945
GI	1926 or older

## Visitor Profile – Highlights YE 2017

	FTL Overnight Leisure	FTL Overnight Leisure FL-Non Res	FTL Overnight Leisure FL-Resident	FTL Overnight Leisure Vacation	FTL Overnight Leisure Non-Vacation	FTL Overnight Business	Miami/Dade Overnight Leisure
Average Age (yrs.)	52	50	57	51	53	48	43
Employed	56%	63%	41%	56%	55%	85%	73%
Retired	34%	30%	41%	32%	35%	6%	17%
Average Income (000)	\$113,062	\$126,322	\$84,648	\$113,821	\$112,477	\$143,996	\$98,034
Children in HH	22%	24%	20%	20%	24%	31%	41%
Gay/Lesbian (LGBT+)	8%	7%	10%	7%	10%	11%	10%

Green = Increased in Share or Increased in Number

Red = Decreased in Share or Decreased in Number

Black = Flat over Previous Year

## Visitor Profile – Highlights YE 2017

	FTL Overnight Leisure	FTL Overnight Leisure FL-Non Res	FTL Overnight Leisure FL-Resident	FTL Overnight Leisure Vacation	FTL Overnight Leisure Non-Vacation	FTL Overnight Business	Miami/Dade Overnight Leisure
Length of Stay (Nights)	4.16	4.70	3.26	4.33	4.04	3.10	3.57
Traveling Party (PPL)	1.86	2.03	1.57	2.05	1.74	1.25	1.79
One Adult	37%	28%	52%	26%	45%	80%	47%
M/F	43%	47%	37%	53%	36%	12%	47%
MM/FF	7%	8%	4%	7%	6%	5%	6%
3 or More Adults	5%	7%	2%	7%	4%	2%	5%
Children Present	8%	9%	6%	7%	8%	1%	8%
Air	35%	50%	3%	39%	32%	46%	35%
Auto	61%	48%	89%	54%	65%	49%	60%



## Visitor Profile – Highlights YE 2017

	FTL Overnight Leisure	FTL Overnight Leisure FL-Non Res	FTL Overnight Leisure FL-Resident	FTL Overnight Leisure Vacation	FTL Overnight Leisure Non-Vacation	Miami/Dade Overnight Leisure
<b>Race/Ethnicity</b>						
White	80%	84%	70%	79%	80%	65%
Black/African American	11%	8%	17%	11%	10%	20%
Asian	3%	3%	2%	3%	3%	7%
Native Hawaiian/Islander	0%	0%	0%	0%	0%	0%
Native American	1%	1%	0%	0%	1%	3%
Other/Mixed	8%	5%	15%	7%	9%	8%
<b>Hispanic, Latino, Spanish Origin</b>	15%	14%	17%	20%	11%	32%

## Visitor Profile – Highlights YE 2017

	FTL Overnight Leisure	FTL Overnight Leisure FL-Non Res	FTL Overnight Leisure FL-Resident	FTL Overnight Leisure Vacation	FTL Overnight Leisure Non-Vacation	Miami/Dade Overnight Leisure
<b>Trip Planning:</b>						
Less Than 1 Week	8%	4%	16%	4%	11%	8%
1 Week	6%	5%	8%	8%	5%	17%
2-3 Weeks	20%	17%	24%	16%	22%	15%
1 Month	18%	15%	24%	20%	18%	19%
2-3 Months	25%	30%	18%	23%	27%	21%
4-5 Months	6%	8%	4%	10%	3%	6%
6 Months	6%	9%	1%	6%	6%	6%
More than 6 Months	7%	11%	2%	10%	6%	5%

## Visitor Profile – Highlights YE 2017

	FTL Overnight Leisure	FTL Overnight Leisure FL-Non Res	FTL Overnight Leisure FL-Resident	FTL Overnight Leisure Vacation	FTL Overnight Leisure Non- Vacation	FTL Overnight Business	Miami/Dade Overnight Leisure
<b>Generations:</b>							
Millennial (1981+)	20%	23%	13%	20%	20%	24%	42%
GenX (1965-1980)	27%	30%	19%	32%	23%	42%	30%
Boomer (1946-1964)	44%	40%	53%	42%	46%	31%	25%
Silent/GI (1945 – Earlier)	9%	6%	14%	5%	11%	3%	3%
<b>Lifestages:</b>							
Young & Free	12%	13%	10%	13%	12%	11%	20%
Young Family	6%	8%	2%	5%	7%	7%	18%
Maturing & Free	19%	24%	11%	28%	13%	32%	15%
Moderate Family	4%	4%	4%	4%	4%	3%	9%
Affluent Family	7%	7%	7%	7%	8%	19%	12%
Moderate Mature	13%	9%	22%	8%	17%	3%	7%
Affluent Mature	33%	30%	37%	31%	34%	23%	17%

## Visitor Profile – Highlights YE 2017

	FTL Overnight Leisure	FTL Overnight Leisure FL-Non Res	FTL Overnight Leisure FL- Resident	FTL Overnight Leisure Vacation	FTL Overnight Leisure Non-Vacation	FTL Overnight Business	Miami/ Dade
Spending (Travel Party)	\$1,153	\$1,472	\$545	\$1,568	\$913	\$745	\$1,132

## Visitor Profile - Highlights YE 2017

	FTL Overnight Leisure	FTL Overnight Leisure FL-Non Res	FTL Overnight Leisure FL- Resident	FTL Overnight Leisure Vacation	FTL Overnight Leisure Non-Vacation	Miami/ Dade Overnight Leisure
<b>Vacation Purpose:</b>						
Getaway Weekend	13%	11%	18%	30%		25%
General Vacation	30%	36%	19%	70%		29%
<b>Non-Vacation Purpose:</b>						
Visit Friends/Relative	30%	30%	30%		52%	26%
Special Event	16%	18%	12%		28%	11%
Medical/Health	1%	0%	3%		2%	1%
Conv/Show/Conference	1%	1%	2%		2%	2%
Seminar/Class/etc.	2%	0%	6%		4%	0%
Other Leisure/Personal	6%	5%	10%		11%	6%

## Visitor Profile - Highlights YE 2017

	Fort Lauderdale Overnight Business
<b>Group/Meeting Purpose:</b>	
Convention	21%
Seminar/Training	20%
Other Group Meeting	24%
<b>Transient Purpose:</b>	
Consulting/Client Services	14%
Inspection/Audit	1%
Construction/Repair	2%
Sales/Purchasing	6%
Government/Military	0%
Other Business	12%

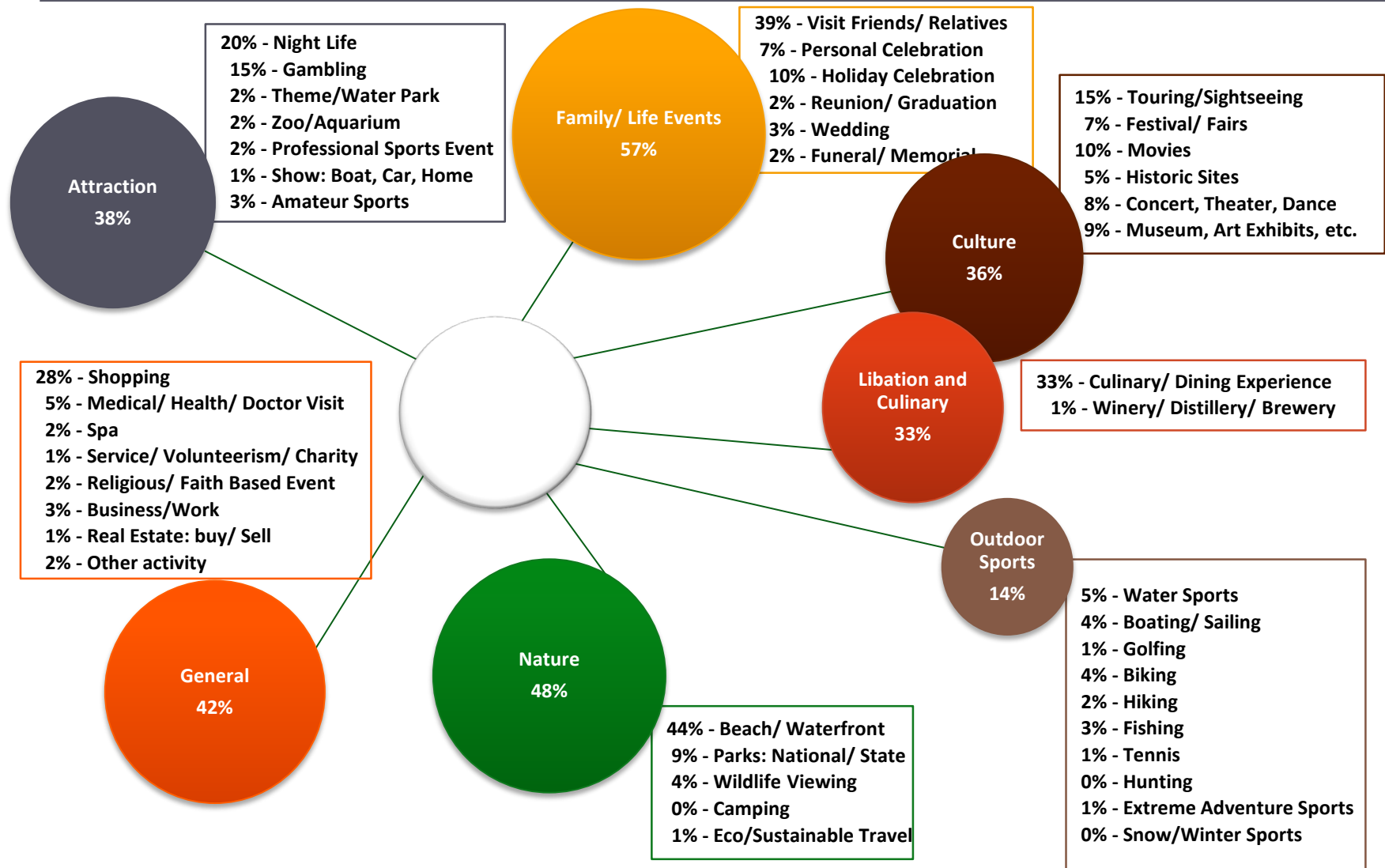
## Visitor Profile – Highlights YE 2017

	FTL Overnight Leisure	FTL Overnight Leisure FL-Non Res	FTL Overnight Leisure FL- Resident	FTL Overnight Leisure Vacation	FTL Overnight Leisure Non-Vacation	FTL Overnight Business	Miami/ Dade
Overall Satisfaction	8.58	8.51	8.71	8.69	8.48	7.88	8.37
Value for the Money	8.19	8.25	8.05	8.15	8.21	7.77	8.04
Friendly Helpful People	8.33	8.34	8.31	8.51	8.19	7.79	8.07
Feeling of Safety	8.34	8.36	8.32	8.48	8.24	7.95	8.15
Likely to Recommend	8.45	8.42	8.52	8.57	8.35	7.63	8.22

Average (10 = Excellent, 1 = Poor)

# Fort Lauderdale Activity Participation

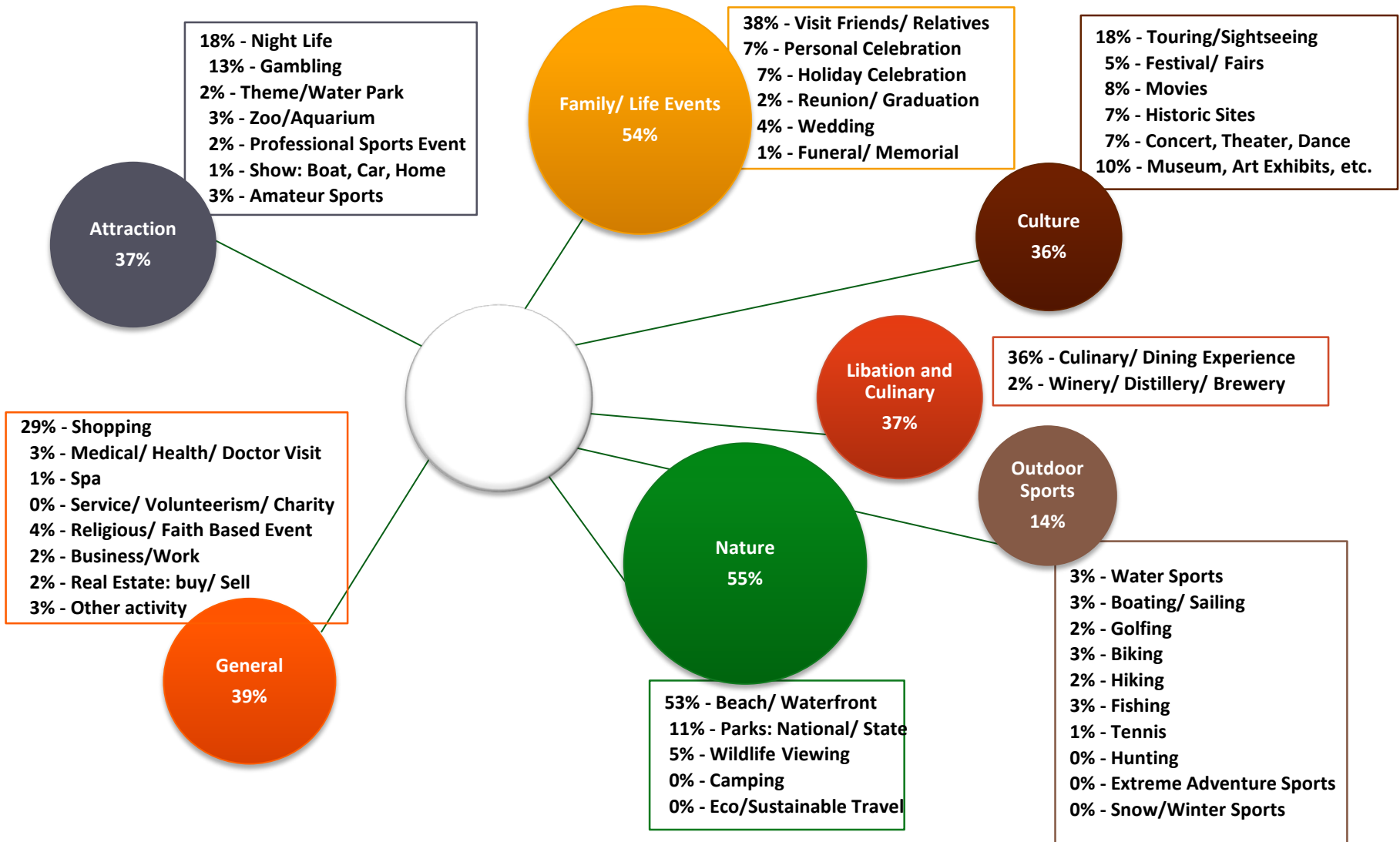
## ACTIVITY PARTICIPATION



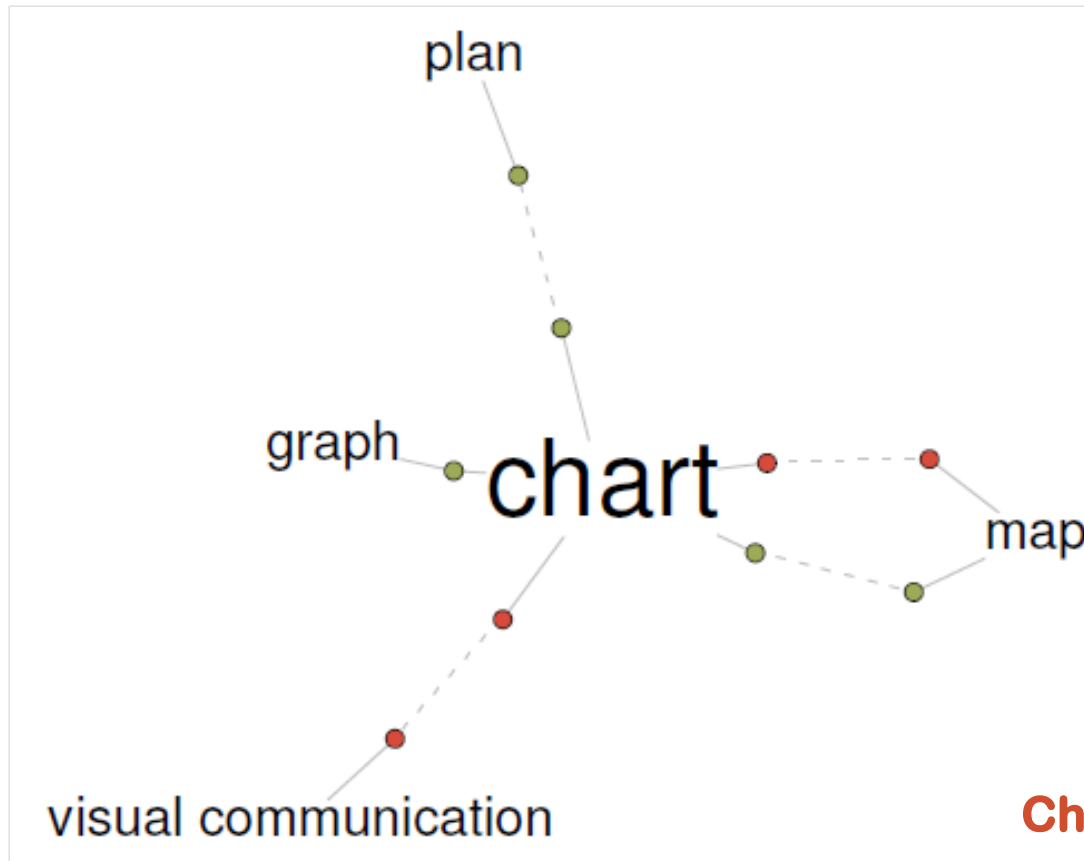


# Fort Lauderdale Activity Participation – Florida Non-Resident

## ACTIVITY PARTICIPATION



Segment: 2016-2017 Overnight Leisure Person-Stays (%)



## Charts and Graphs

Fort Lauderdale Year-End 2017

# Age Distribution: U.S., Fort Lauderdale, Miami/Dade, Business

DEMOGRAPHICS

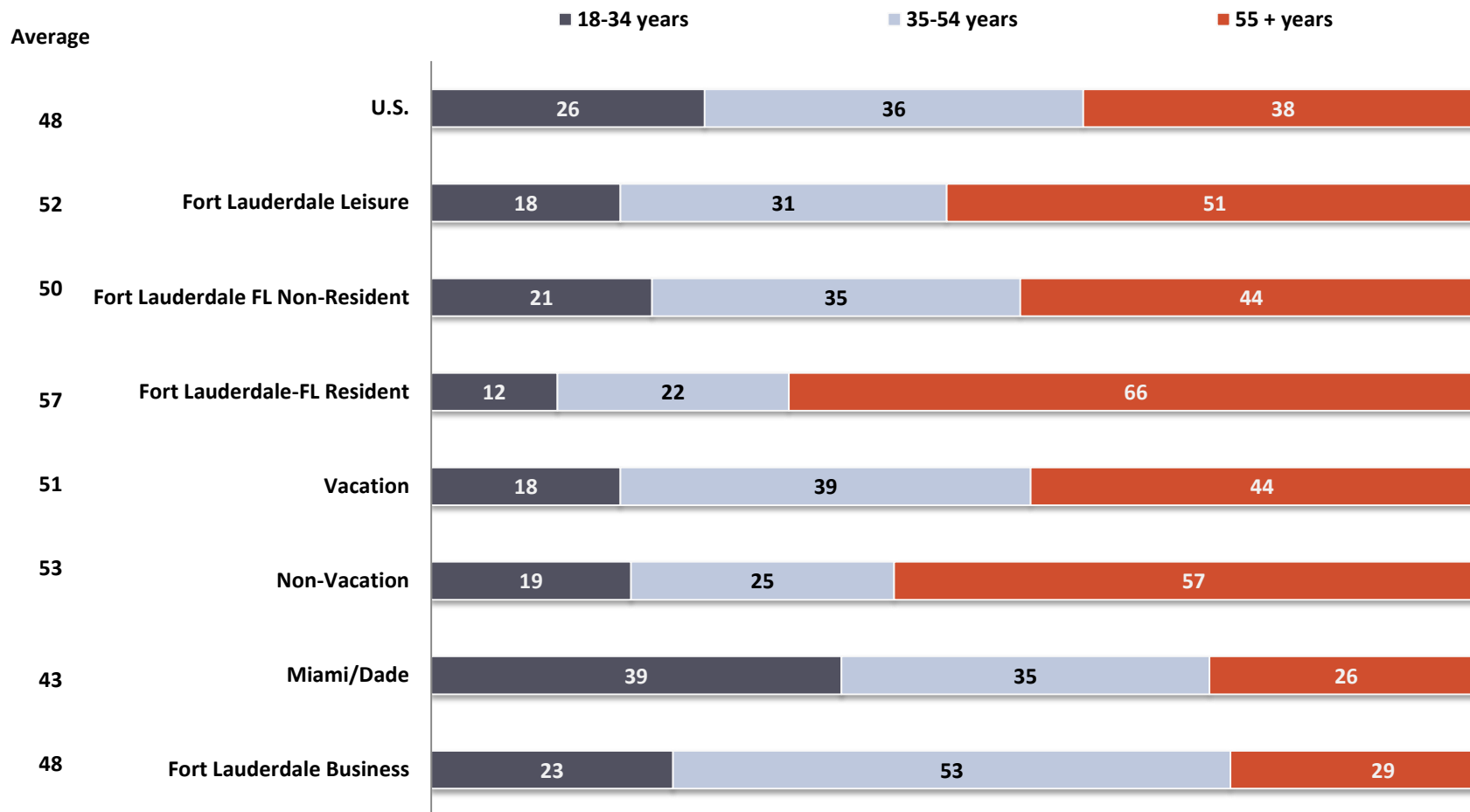


Chart 1 • Segment: 2017 Overnight Person-Stays (%),

# Fort Lauderdale Avg. Party per Trip Spending by Age

DEMOGRAPHICS

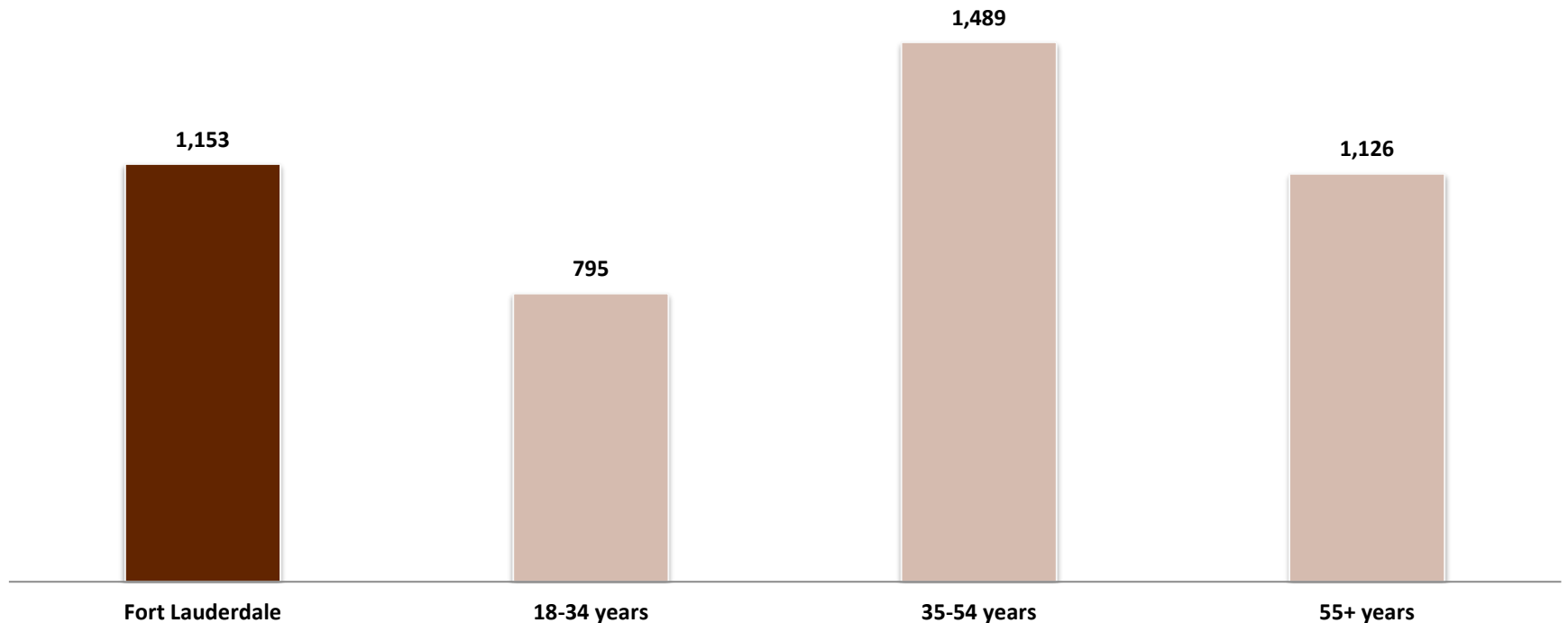


Chart 2 • Segment: 2015-2017 Overnight Leisure Stays (\$)

GLOSSARY

## Average Party per Trip Spending

Includes reported expenditures of all travelers (including transportation expenditure) who spend more than \$1 on their trip to or within the destination. Individual averages for subgroups of variables, such as accommodation types or activities might be higher than the total average party per trip spending for a destination because the travelers' spending is included only in those subgroups of variables to which the respondent replied.

# Fort Lauderdale Age Comparison

DEMOGRAPHICS

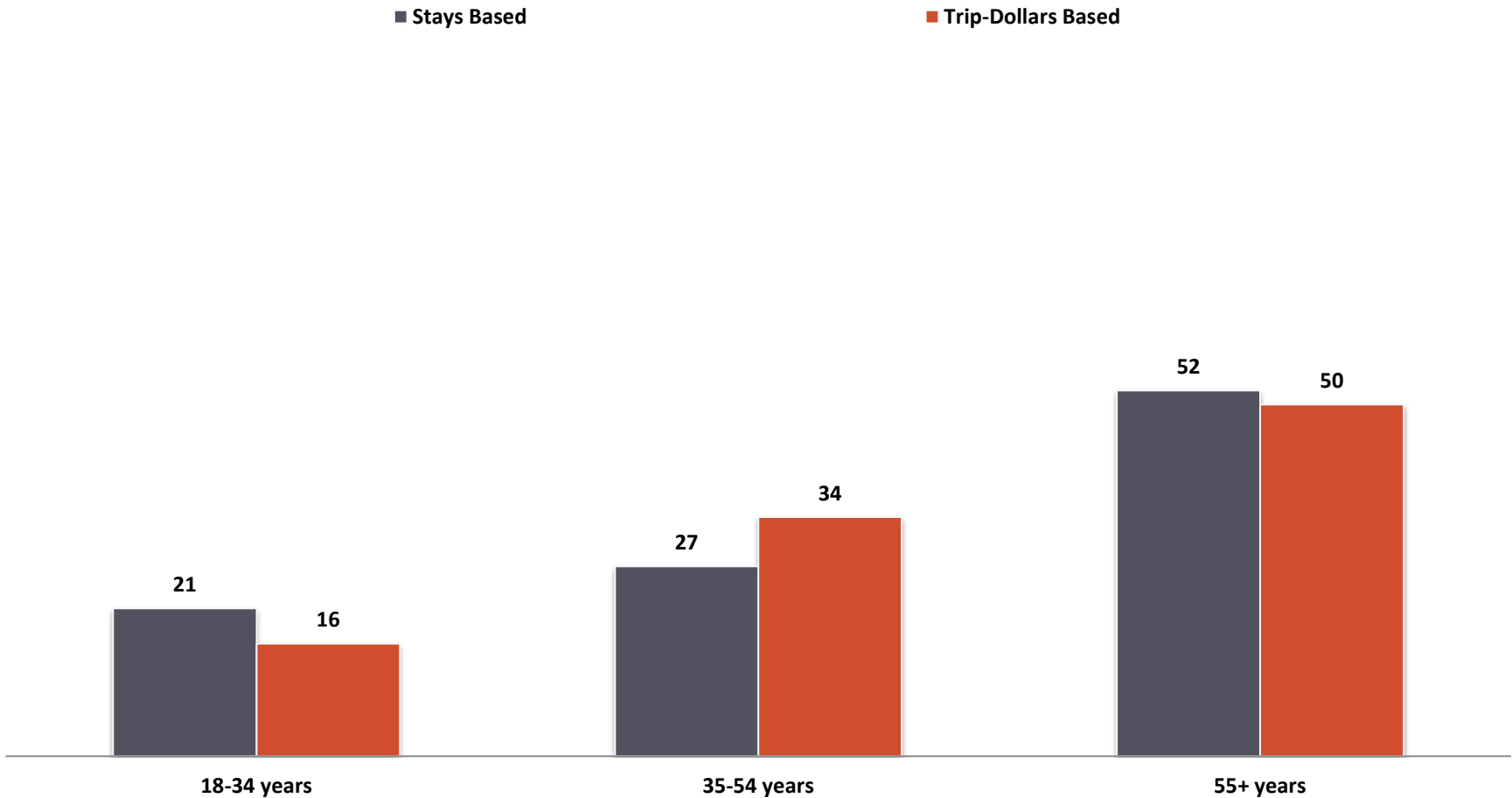


Chart 3 • Segment: 2015-2017 Overnight Leisure (%)

# Distribution of Children in Household: U.S., Fort Lauderdale, Miami/Dade, Business

DEMOGRAPHICS

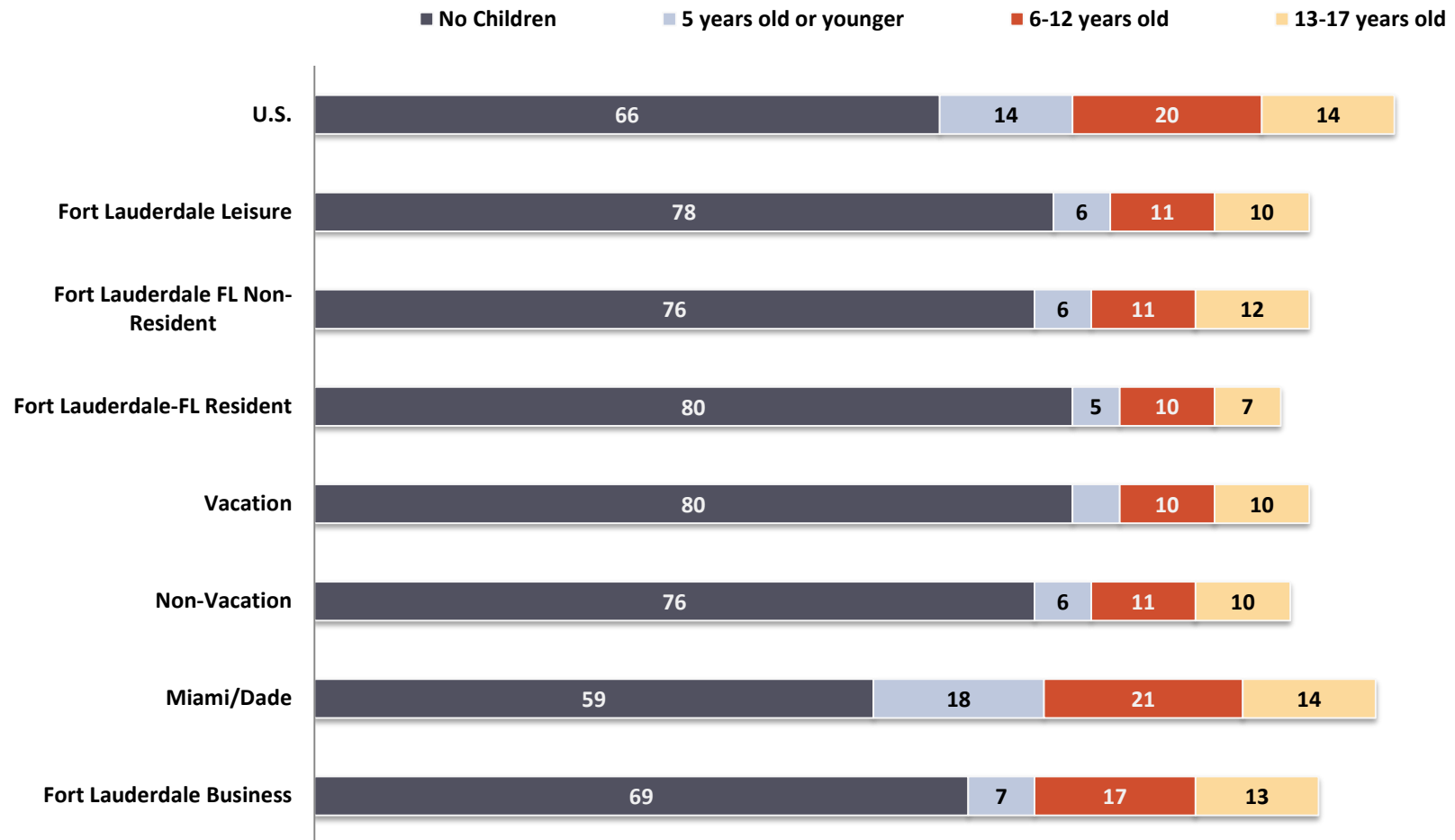


Chart 4 • Segment: 2016-2017 Overnight Leisure Person-Stays (%)

GLOSSARY

Sum exceeds 100% due to multiple-children households.

# Household Income Distribution: U.S., Fort Lauderdale, Miami/Dade, Business

DEMOGRAPHICS

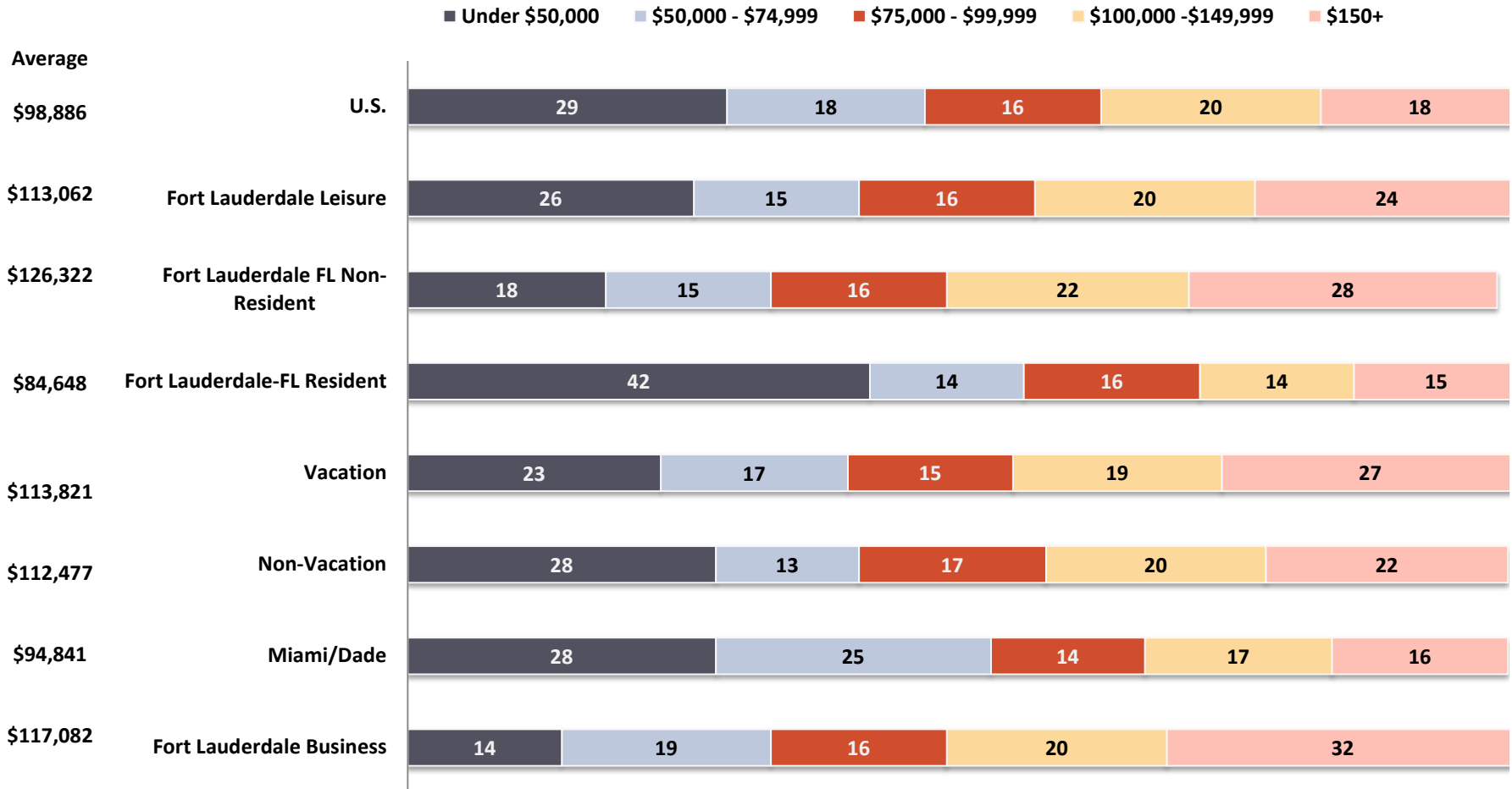


Chart 5 • Segment: 2016-2017 Overnight Leisure Person-Stays (%)

# Lifestage Distribution: U.S., Fort Lauderdale, Miami/Dade, Business

DEMOGRAPHICS

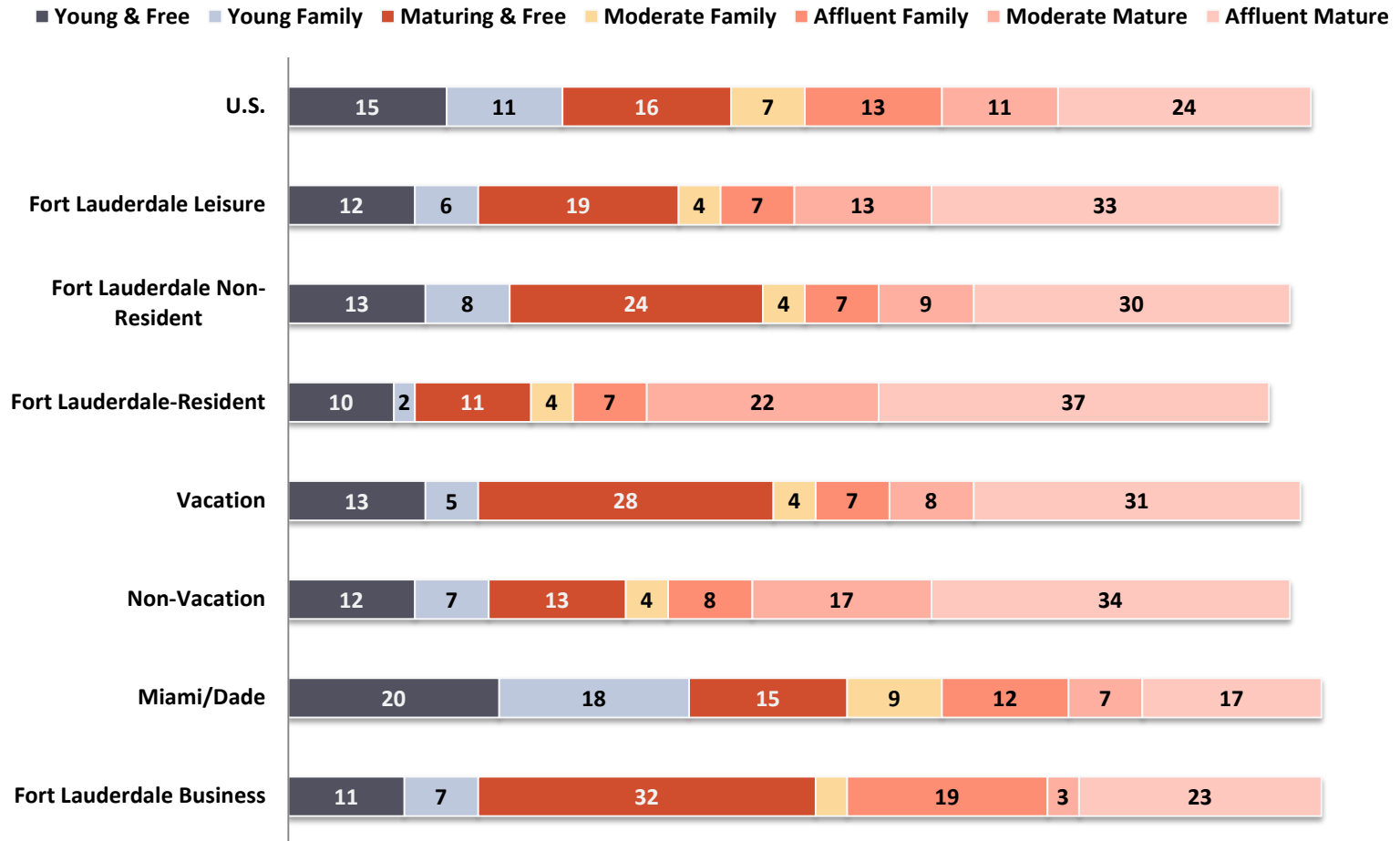


Chart 6 • Segment: 2016-2017 Overnight Leisure Person-Stays (%)



## Fort Lauderdale Avg. Party per Trip Spending by Lifestage

DEMOGRAPHICS

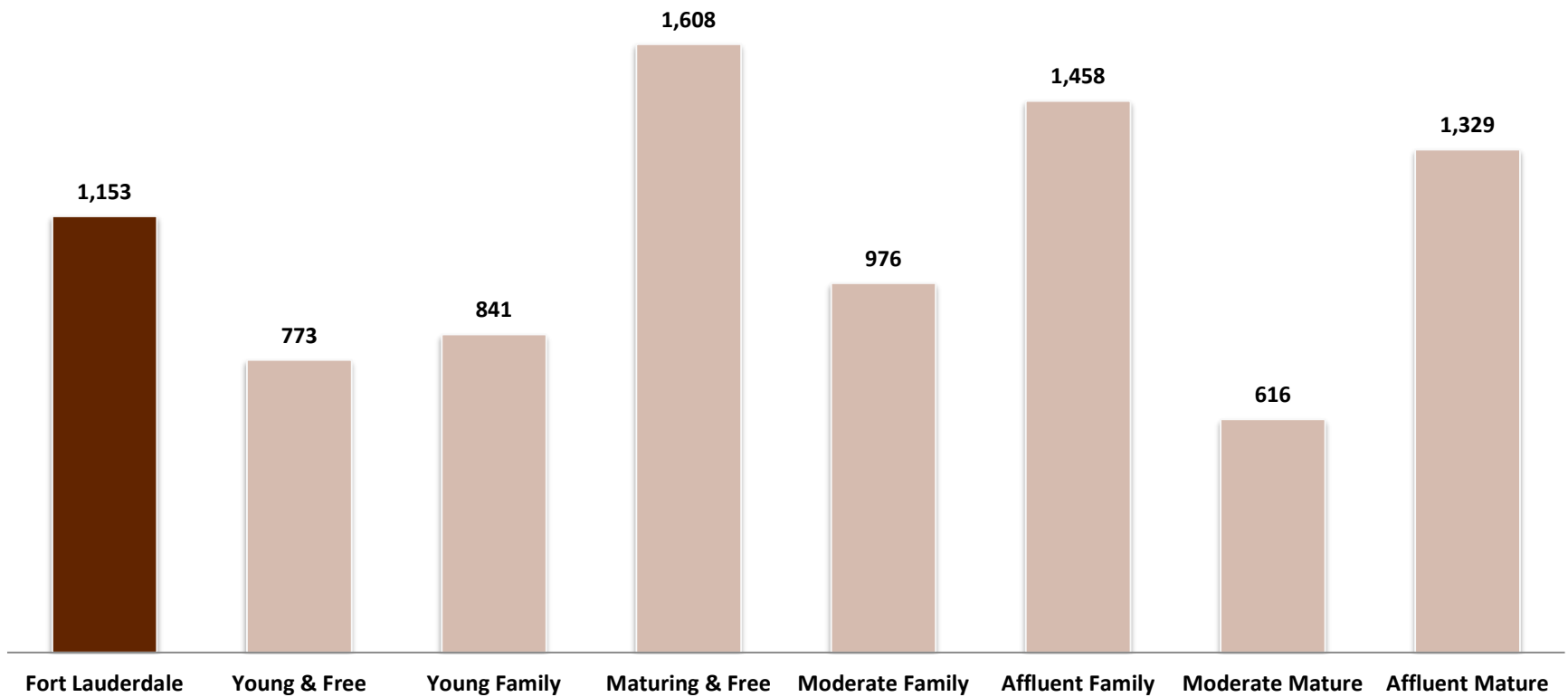


Chart 7 • Segment: 2015-2017 Overnight Leisure Stays (\$)

# Fort Lauderdale Lifestage Comparison

DEMOGRAPHICS

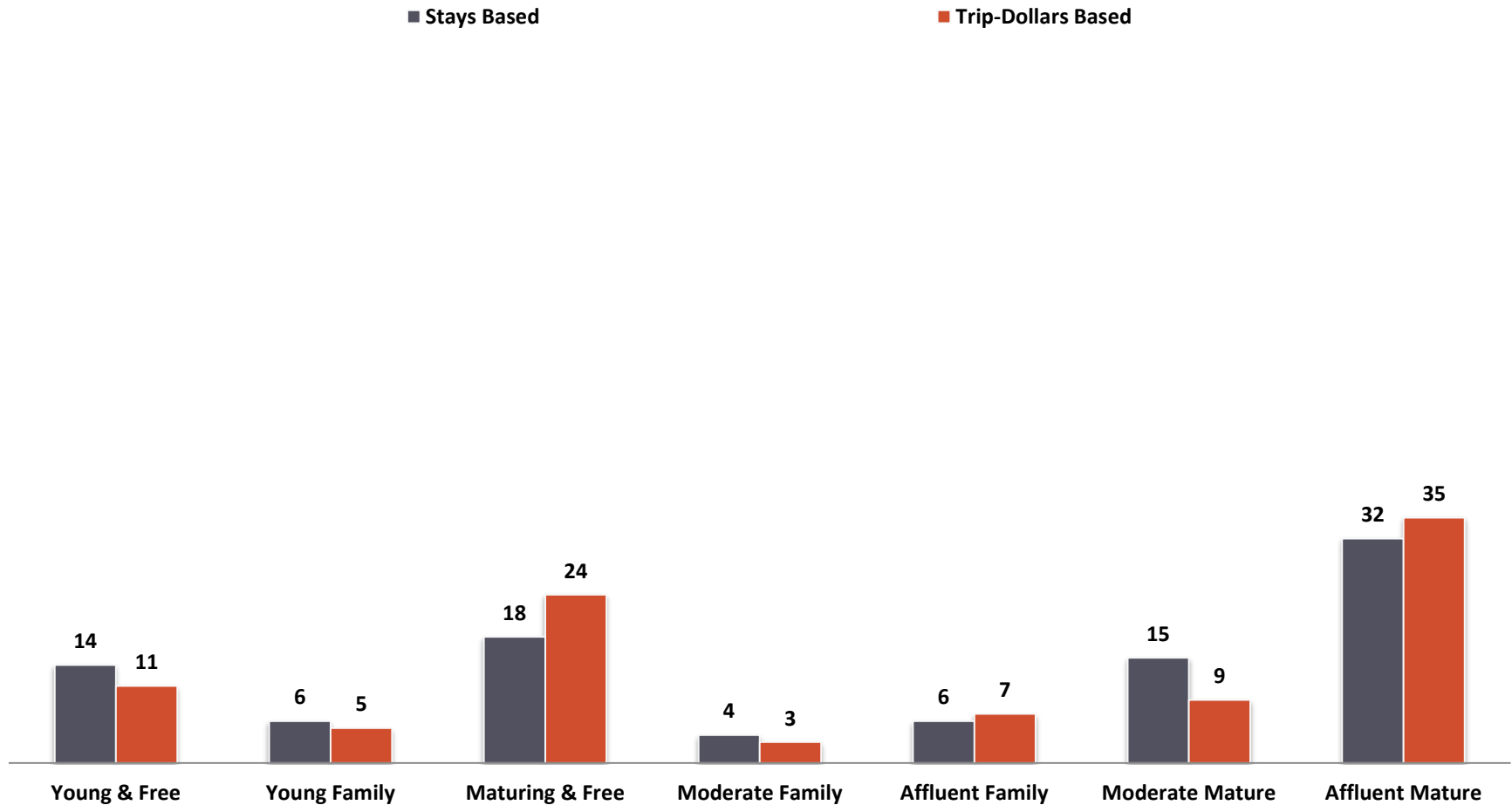


Chart 8 • Segment: 2015-2017 Overnight Leisure (%)

# Generation Distribution: U.S., Fort Lauderdale, Miami/Dade, Business

DEMOGRAPHICS

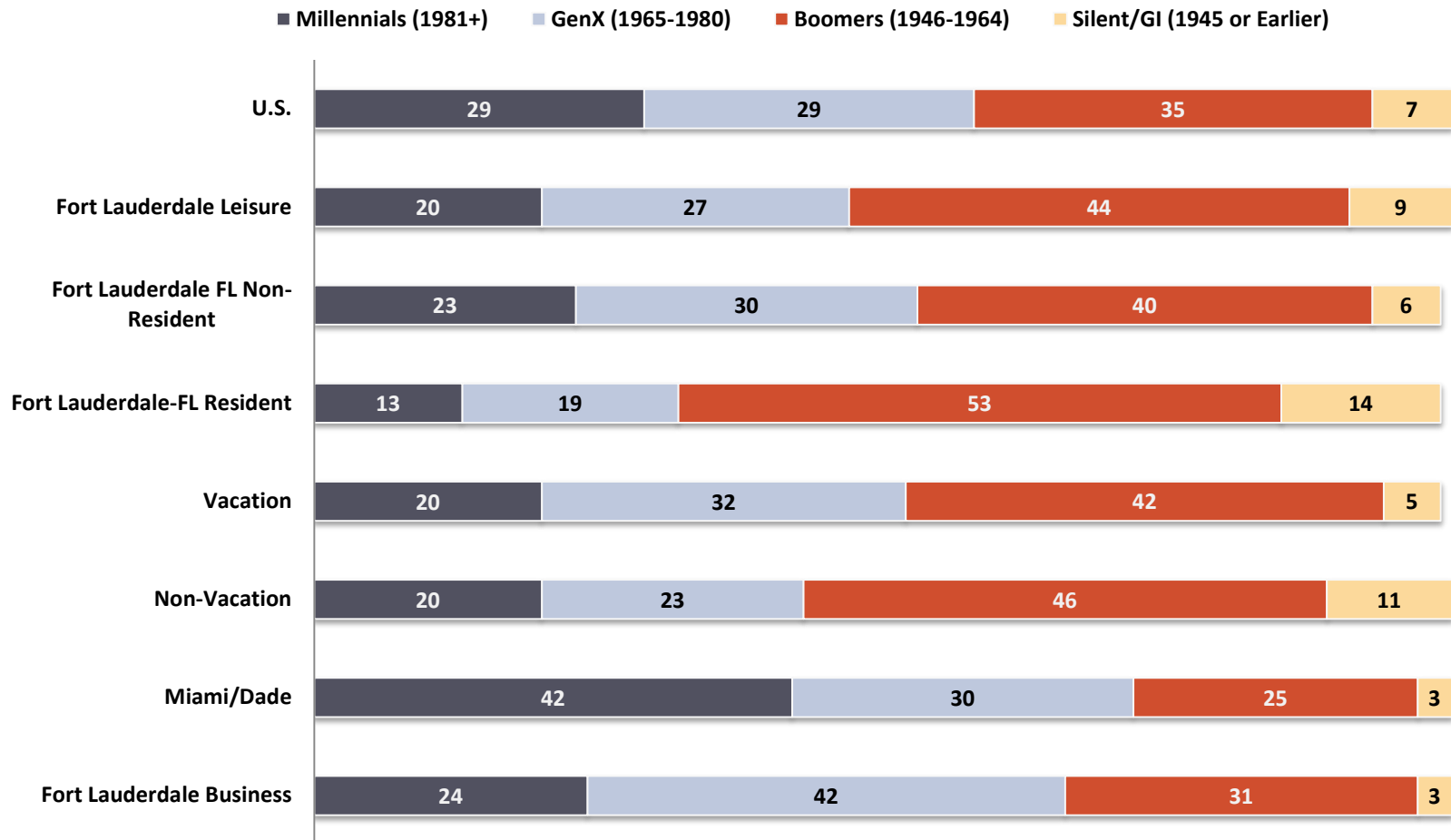


Chart 9 • Segment: 2016-2017 Overnight Leisure Person-Stays (%)

## Fort Lauderdale Avg. Party per Trip Spending by Generation

DEMOGRAPHICS

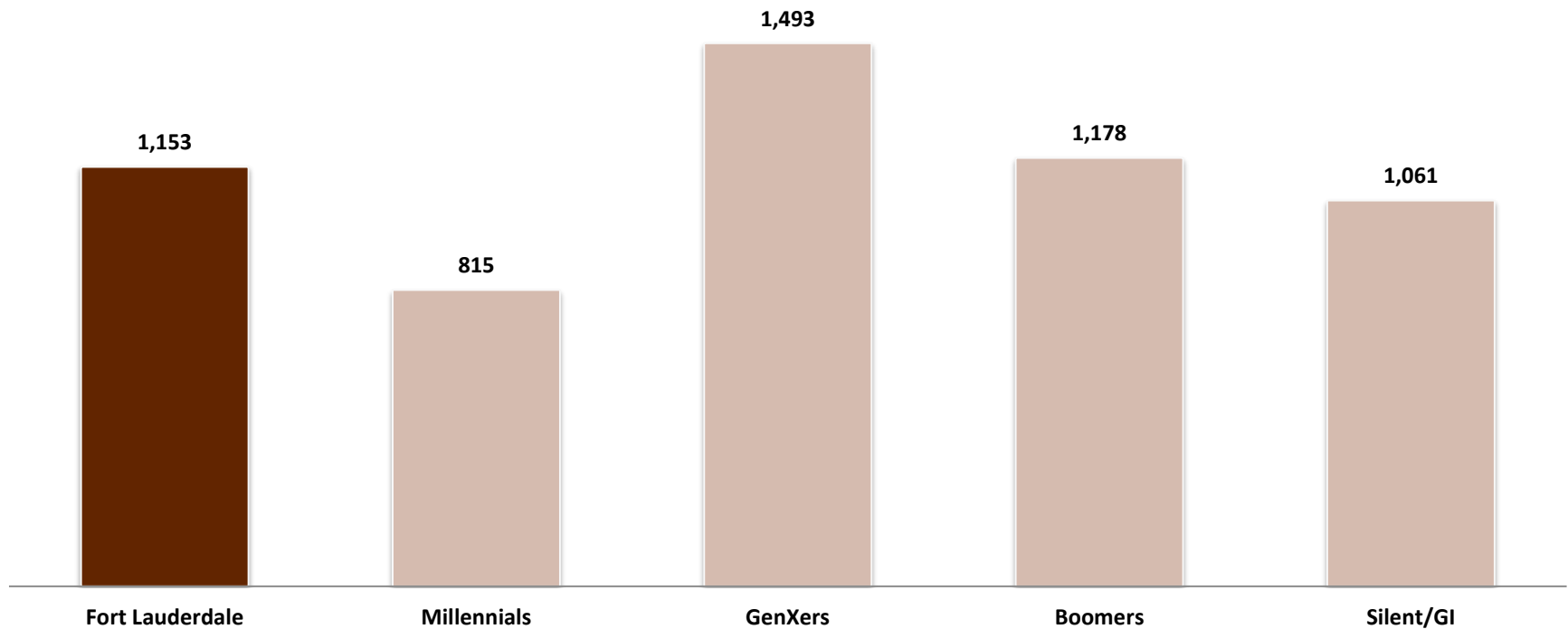


Chart 10 • Segment: 2015-2017 Overnight Leisure Stays (\$)

# Fort Lauderdale Traveler Generation Comparison

DEMOGRAPHICS

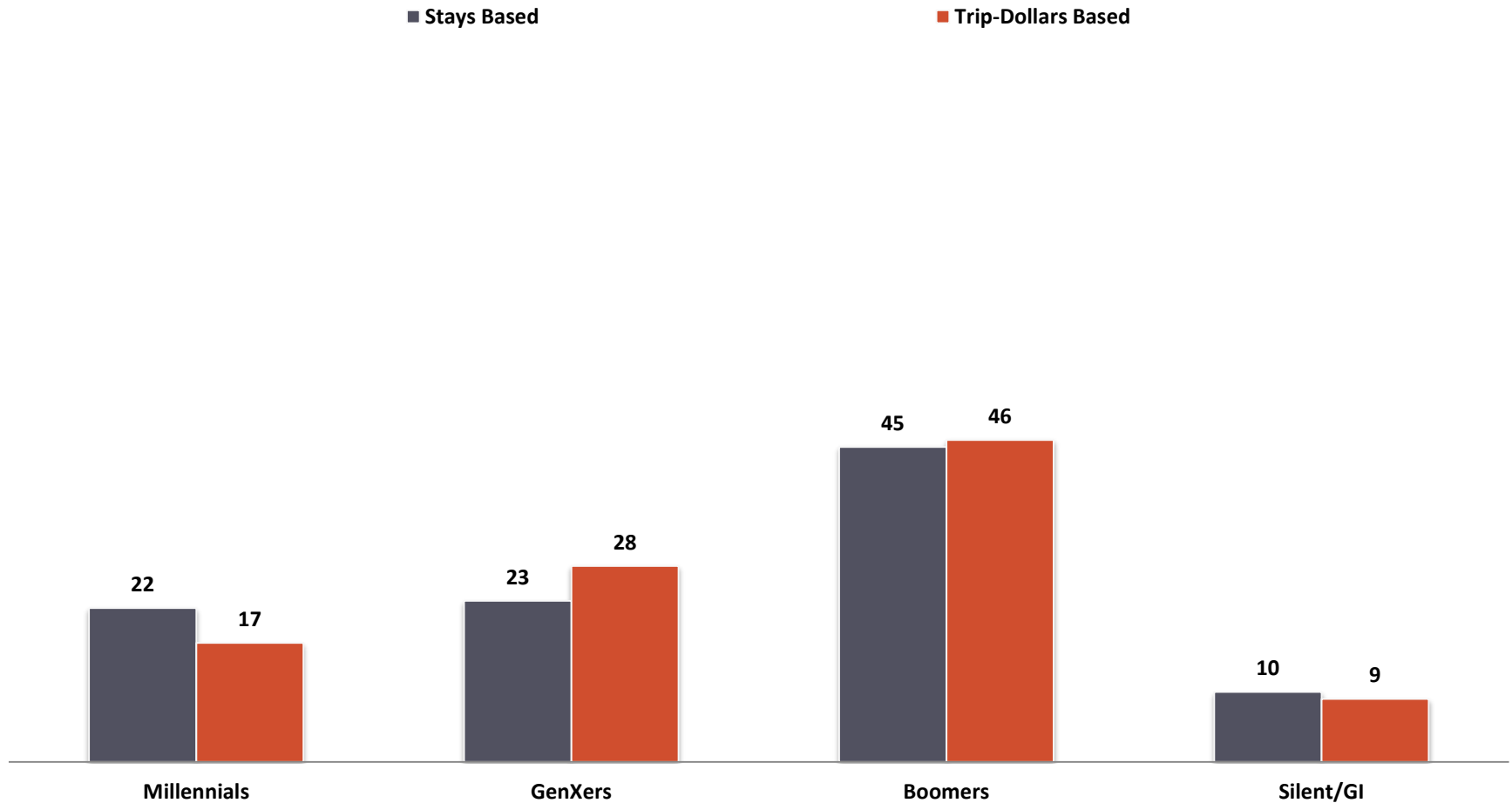
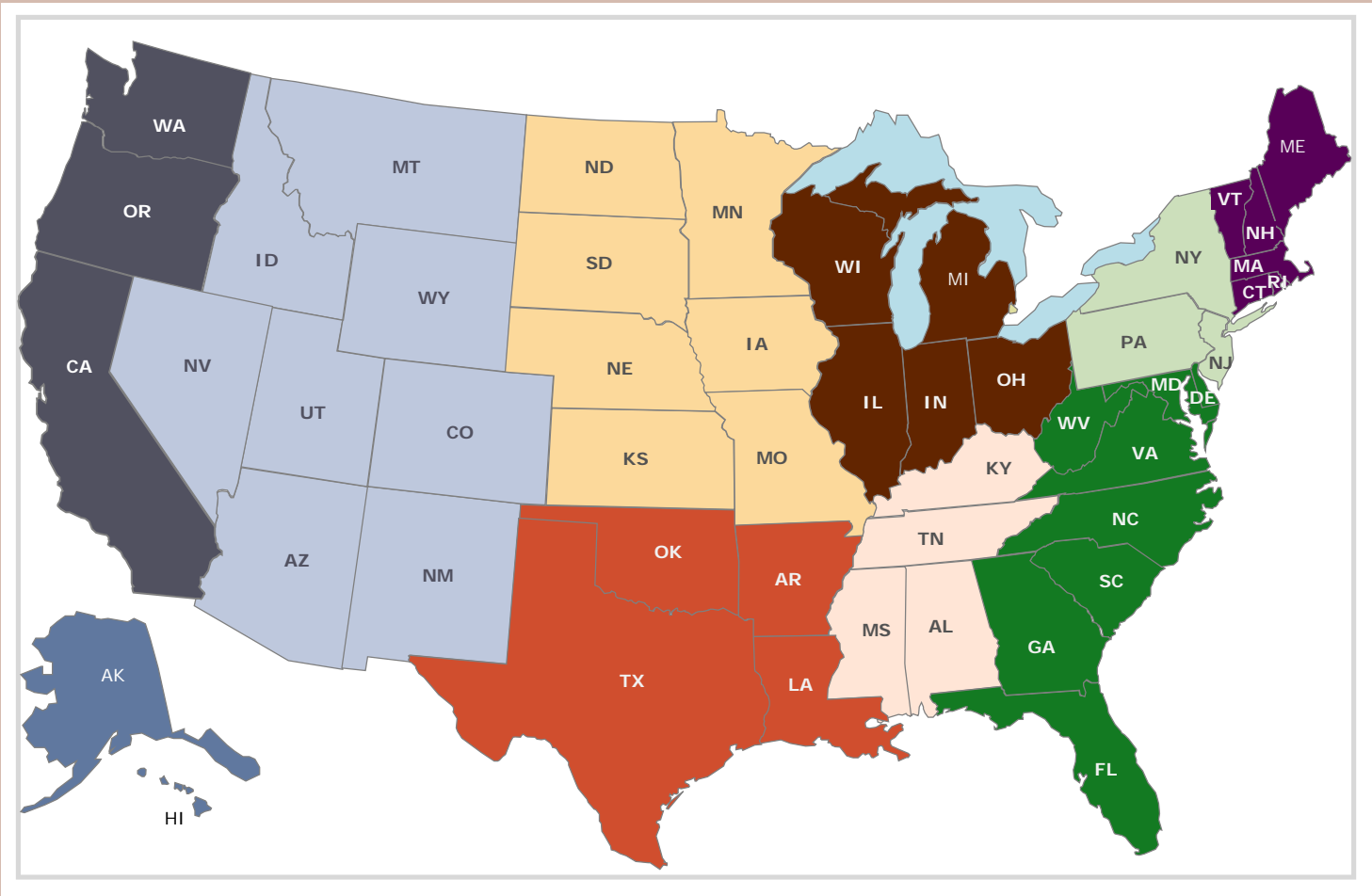


Chart 11 • Segment: 2015-2017 Overnight Leisure (%)

# Origin Divisions for Travel to Fort Lauderdale



LEGEND		
<div></div>	Pacific	5.8%
<div></div>	Rocky Mountain	2.2%
<div></div>	West North Central	3.6%
<div></div>	West South Central	2.2%
<div></div>	East North Central	15.5%
<div></div>	East South Central	4.4%
<div></div>	New England	5.5%
<div></div>	Middle Atlantic	16.3%
<div></div>	South Atlantic	44.5%

# Top Origin States to Fort Lauderdale

TRIP ORIGIN

Fort Lauderdale Overnight Leisure		Fort Lauderdale Overnight Leisure Florida Non -Resident		Fort Lauderdale Overnight Leisure Vacation (Weekend and General Vacation)		Fort Lauderdale Overnight Leisure Non-Vacation (VFR, etc.)	
New York	8.6	New York	12.7	California	7.9	New York	9.8
California	5.1	California	7.5	New York	7.1	Indiana	5.1
New Jersey	5.0	New Jersey	7.4	Ohio	6.4	New Jersey	4.9
Indiana	4.9	Indiana	7.1	New Jersey	5.2	North Carolina	4.8
Ohio	4.3	Ohio	6.4	Indiana	4.6	Massachusetts	3.7
Massachusetts	3.2	Massachusetts	4.7	Tennessee	3.7	Missouri	3.2
North Carolina	3.1	North Carolina	4.6	Maryland	3.5	California	3.0
Georgia	2.9	Georgia	4.3	Illinois	3.1	Georgia	3.0
Michigan	2.8	Michigan	4.2	Michigan	2.9	Pennsylvania	2.9
Pennsylvania	2.6	Pennsylvania	3.9	Georgia	2.9	Ohio	2.8
Illinois	2.6	Illinois	3.7	Connecticut	2.7	Michigan	2.8
Missouri	2.5	Missouri	3.7	Massachusetts	2.5	Virginia	2.2
Tennessee	2.2	Tennessee	3.3	Pennsylvania	2.2	Illinois	2.1

## Top Origin States to Fort Lauderdale

TRIP ORIGIN

Miami/Dade Overnight Leisure		Fort Lauderdale Overnight Business	
New York	8.9	New York	6.9
Georgia	7.0	Georgia	5.8
New Jersey	4.9	Pennsylvania	5.3
Maryland	4.5	Ohio	4.2
California	4.2	Maryland	4.1
North Carolina	3.1	Illinois	3.6
Ohio	2.9	New Jersey	2.1
Illinois	2.3	California	1.6
Pennsylvania	2.2	North Carolina	1.5
Virginia	2.2	Connecticut	1.3
Massachusetts	2.1	Virginia	1.3
Connecticut	2.1	Massachusetts	1.2
Tennessee	2.1	Tennessee	0.7



# Top Origin DMAs to Fort Lauderdale

TRIP ORIGIN

Fort Lauderdale Overnight Leisure		Fort Lauderdale Overnight Leisure Florida Non -Resident		Fort Lauderdale Overnight Leisure Florida Resident		Fort Lauderdale Overnight Leisure Vacation (Weekend and General Vacation)	
New York, NY	10.6%	New York, NY	15.5%	Miami-Fort Lauderdale, FL	24.51%	New York, NY	9.0%
Indianapolis, IN	3.8%	Indianapolis, IN	5.7%	Tampa-St. Petersburg (Sarasota), FL	22.52%	Tampa-St. Petersburg (Sarasota), FL	7.5%
San Francisco-Oakland-San Jose, CA	3.6%	San Francisco-Oakland-San Jose, CA	5.3%	West Palm Beach-Fort Pierce, FL	20.62%	Miami-Fort Lauderdale, FL	7.5%
Atlanta, GA	2.8%	Atlanta, GA	4.2%	Orlando-Daytona Beach-Melbourne, FL	15.26%	West Palm Beach-Fort Pierce, FL	7.5%
Cleveland, OH	2.8%	Cleveland, OH	4.2%	Fort Myers-Naples, FL	7.71%	Chicago, IL	3.7%
Boston, MA (Manchester, NH)	2.5%	Boston, MA (Manchester, NH)	3.6%	Jacksonville, FL	6.4%	Cleveland, OH	3.7%
Philadelphia, PA	2.4%	Philadelphia, PA	3.5%	Gainesville, FL	2.22%	Orlando-Daytona Beach-Melbourne, FL	2.8%
Washington, DC (Hagerstown, MD)	2.3%	Washington, DC (Hagerstown, MD)	3.4%	Tallahassee, FL-Thomasville, GA	0.54%	Atlanta, GA	2.7%
Chicago, IL	2.1%	Chicago, IL	3.1%	Mobile, AL-Pensacola (Fort Walton Beach), FL	0.21%	Boston, MA (Manchester, NH)	2.1%
Detroit, MI	2.0%	Detroit, MI	3.0%			Baltimore, MD	2.0%
St. Louis, MO	1.6%	St. Louis, MO	2.3%			Washington, DC (Hagerstown, MD)	1.8%
Buffalo, NY	1.5%	Buffalo, NY	2.3%			Fort Meyers-Naples, FL	1.7%
Nashville, TN	1.5%	Nashville, TN	2.2%			Philadelphia, PA	1.5%
Raleigh-Durham, NC	1.3%	Raleigh-Durham, NC	1.9%			Savannah, GA	1.0%

Segment: 2016-2017 Overnight Leisure Person-Stays (%)

# Top Origin DMAs to Fort Lauderdale

TRIP ORIGIN

Fort Lauderdale Overnight Leisure Non-Vacation (VFR, etc.)		Miami/Dade		Fort Lauderdale Overnight Business	
New York, NY	11.7%	New York, NY	13.3%	Orlando-Daytona Beach-Melbourne, FL	15.6%
Miami-Fort Lauderdale, FL	8.1%	Tampa-St. Petersburg (Sarasota), FL	10.3%	Tampa-St. Petersburg (Sarasota), FL	15.3%
Tampa-St. Petersburg (Sarasota), FL	7.0%	Atlanta, GA	6.5%	New York, NY	8.6%
Orlando-Daytona Beach-Melbourne, FL	6.4%	Fort Meyers-Naples, FL	5.2%	Louisville, KY	6.0%
West Palm Beach-Fort Pierce, FL	5.9%	Washington, DC (Hagerstown, MD)	4.5%	Miami-Fort Lauderdale, FL	4.8%
Jacksonville, FL	3.6%	Miami-Fort Lauderdale, FL	3.3%	Savannah, GA	3.6%
Philadelphia, PA	3.1%	Jacksonville, FL	3.1%	Baltimore, MD	3.2%
Fort Meyers-Naples, FL	3.0%	West Palm Beach-Fort Pierce, FL	2.8%	Philadelphia, PA	2.6%
Atlanta, GA	2.9%	Orlando-Daytona Beach-Melbourne, FL	2.5%	Jacksonville, FL	2.5%
Boston, MA (Manchester, NH)	2.8%	Chicago, IL	2.1%	Dallas-Fort Worth, TX	2.5%
Washington, DC (Hagerstown, MD)	2.7%	Boston, MA (Manchester, NH)	2.0%	Cincinnati, OH	2.4%
Cleveland, OH	2.2%	Baltimore, MD	1.7%	Fort Meyers-Naples, FL	2.4%
Louisville, KY	1.1%	Philadelphia, PA	1.4%	Washington, DC (Hagerstown, MD)	2.2%
Gainesville, FL	1.1%	Dallas-Fort Worth, TX	0.7%	Atlanta, GA	2.1%

Segment: 2016-2017 Overnight Leisure Person-Stays (%)

## Fort Lauderdale Avg. Party per Trip Spending by Origin DMA

TRIP ORIGIN

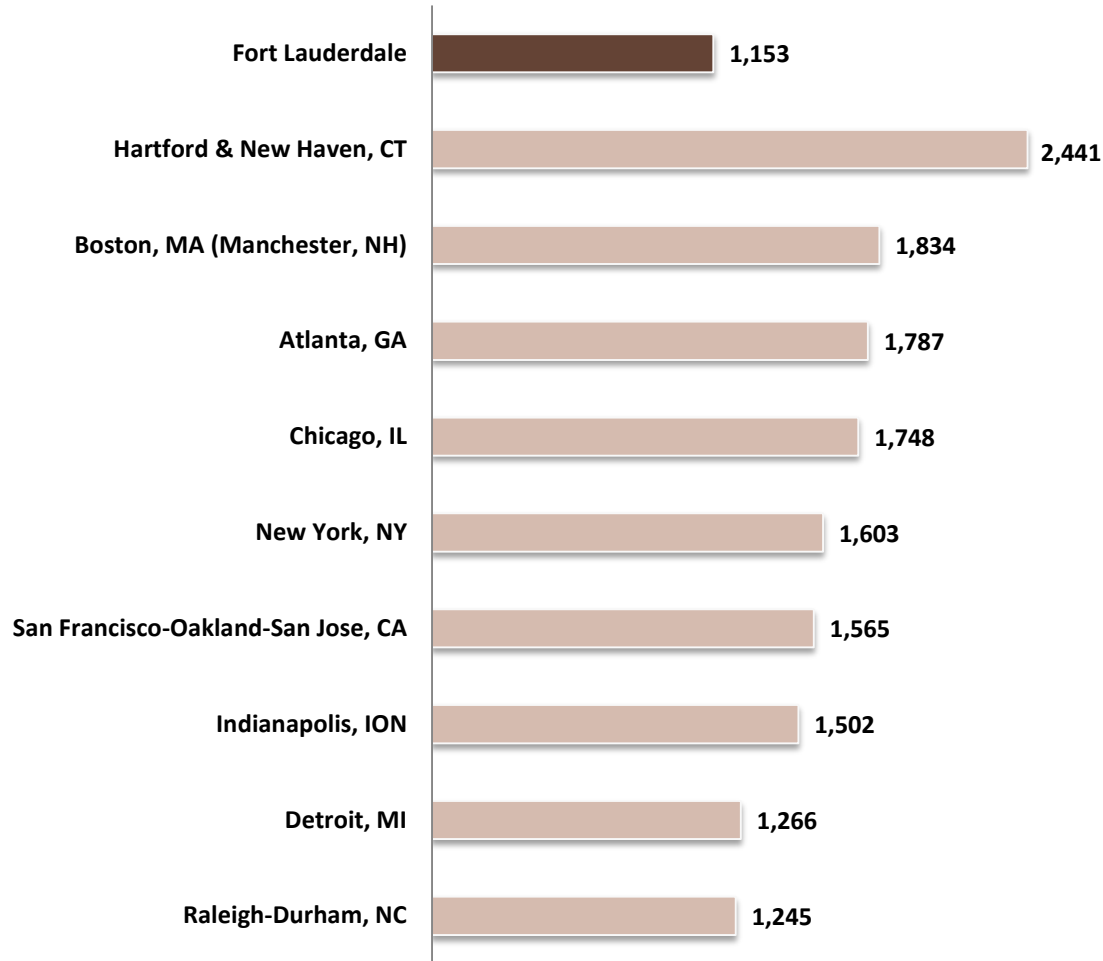


Chart 12 • Segment: 2015-2017 Overnight Leisure Stays (\$)

## Fort Lauderdale Avg. Party per Trip Spending by Origin DMA (cont.)

TRIP ORIGIN

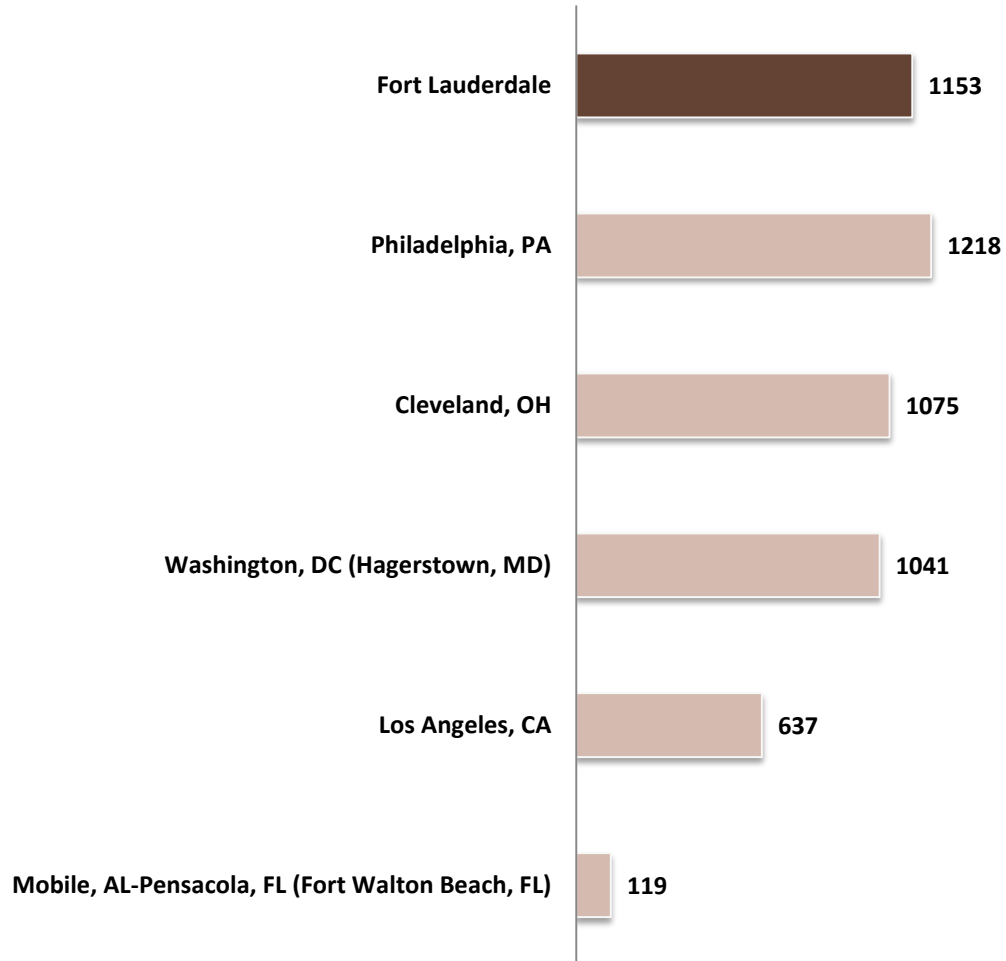


Chart 12 • Segment: 2015-2017 Overnight Leisure Stays (\$)

# Fort Lauderdale Origin DMA Comparison

TRIP ORIGIN

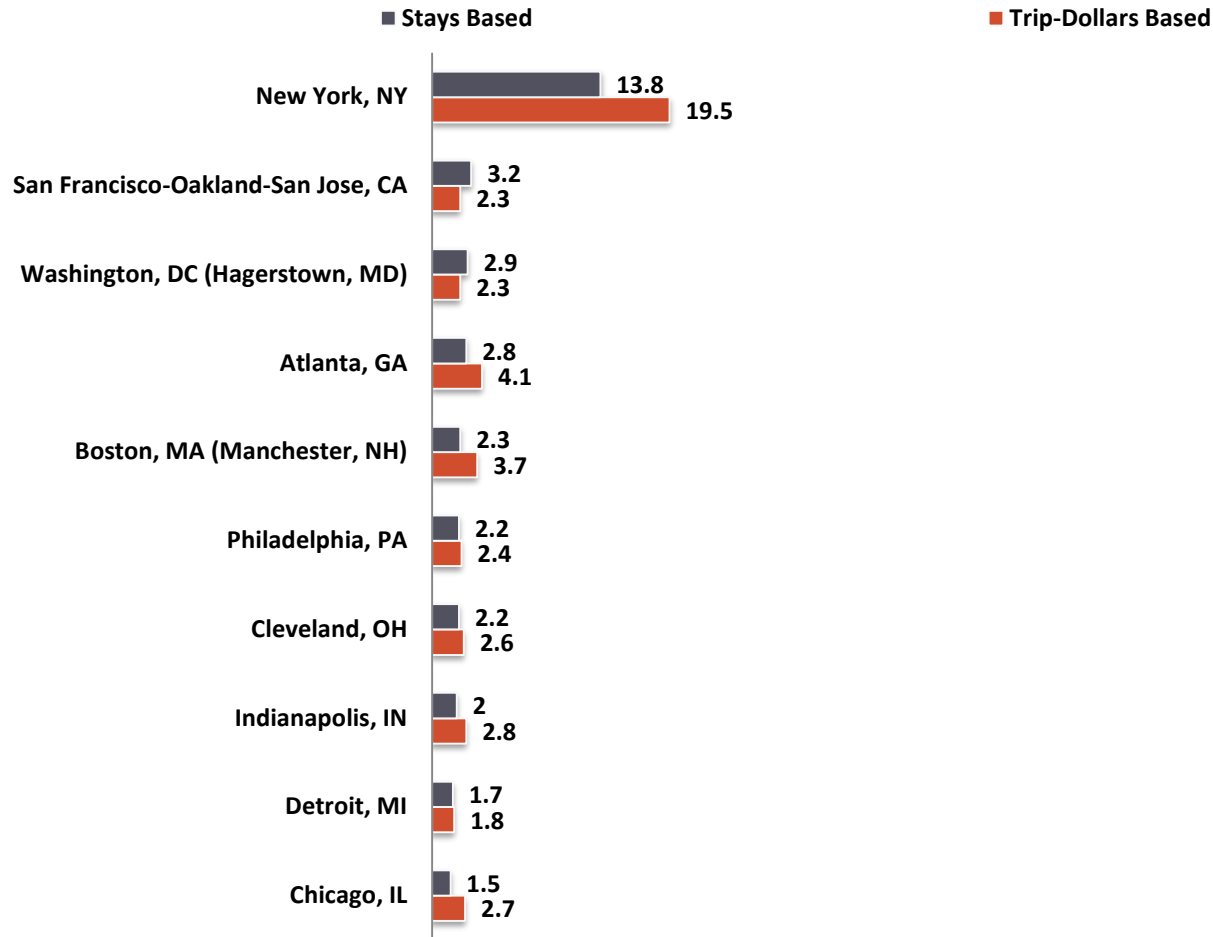


Chart 13 • Segment: 2015-2017 Overnight Leisure (%)

# Main Mode of Transportation: U.S., Fort Lauderdale, Miami/Dade, Business

TRANSPORTATION

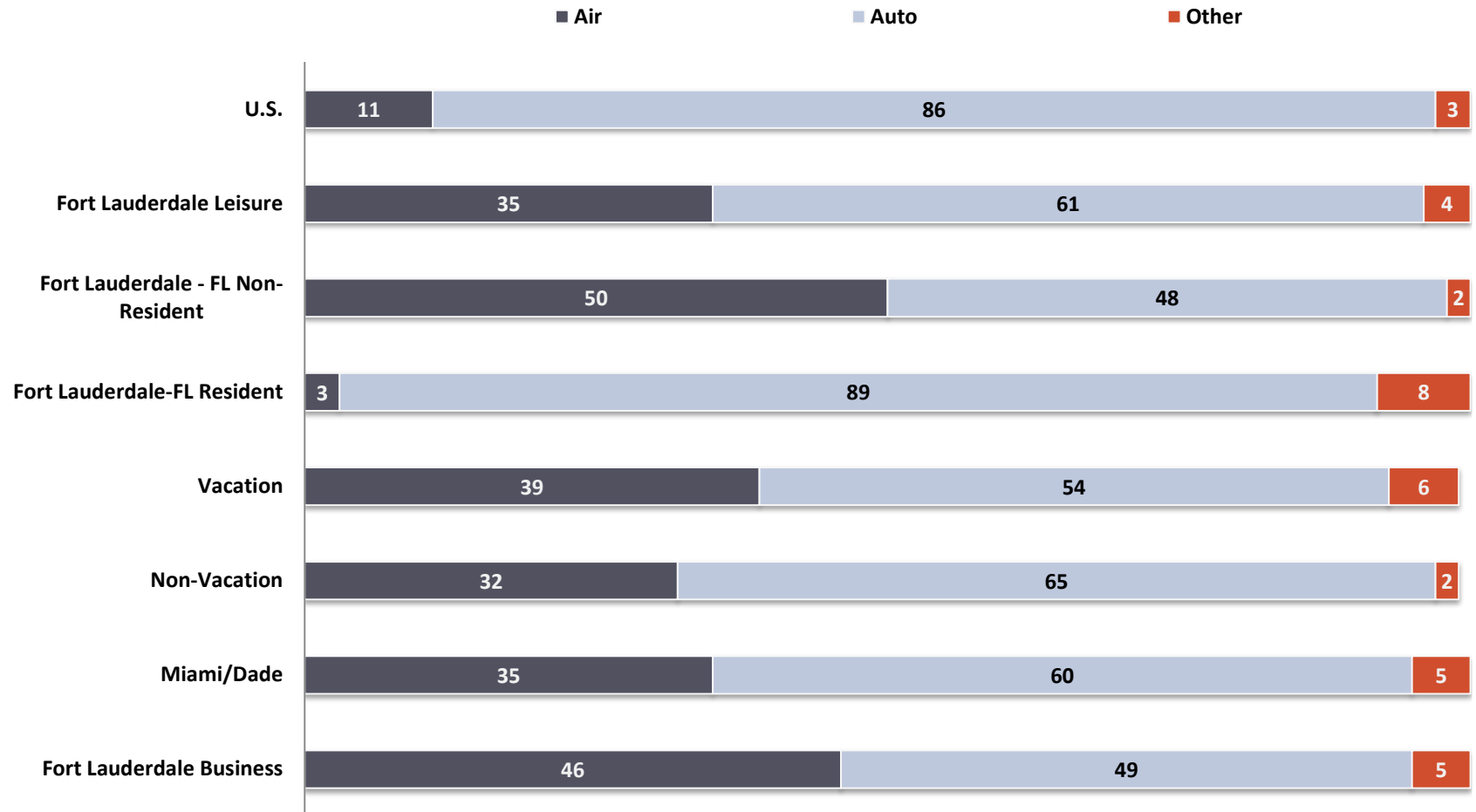


Chart 14 • Segment: 2016-2017 Overnight Leisure Person-Stays (%)

# Trip Timing by Season: U.S., Fort Lauderdale, Miami/Dade, Business

TRIP TIMING

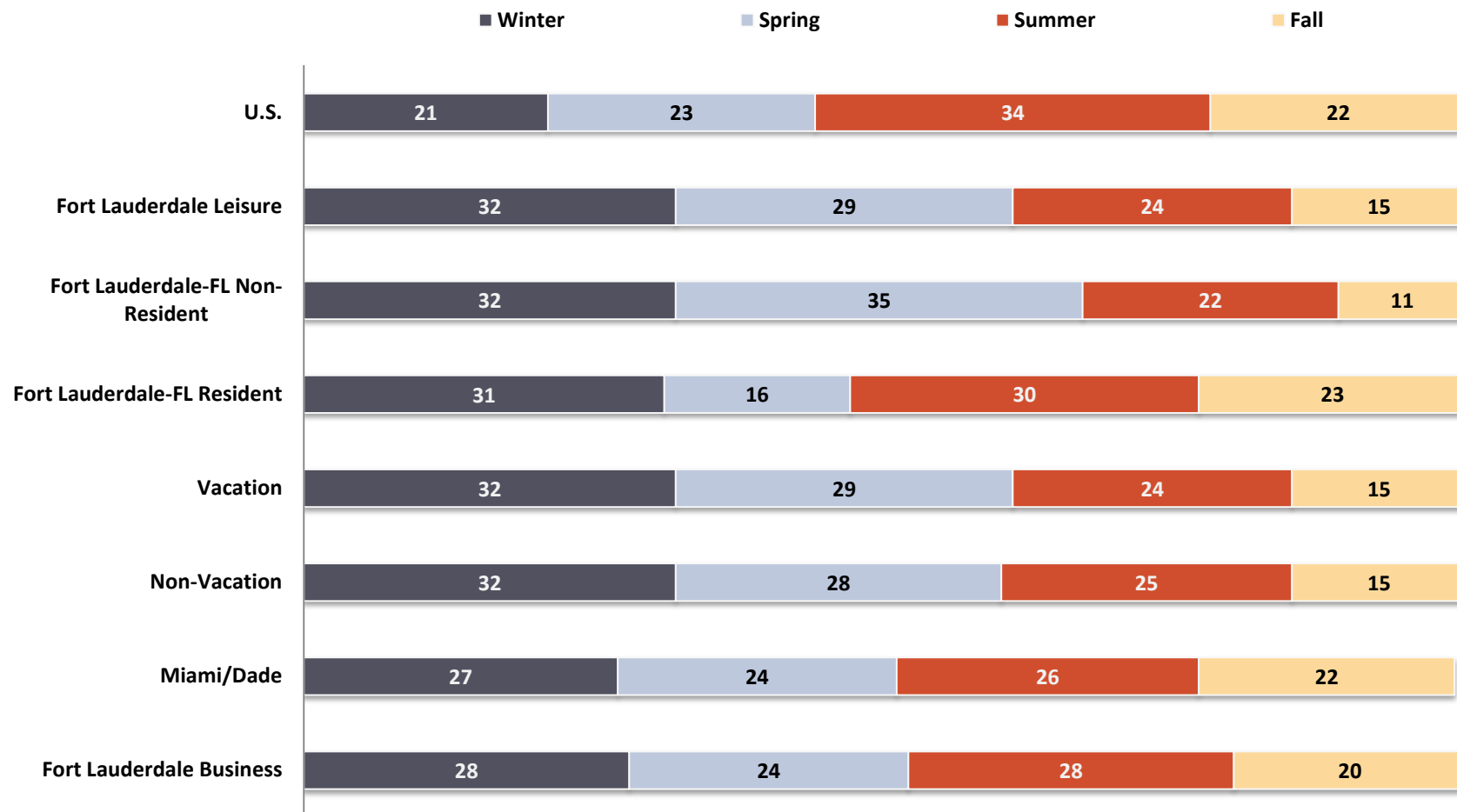


Chart 15 • Segment: 2016-2017 Overnight Leisure Person-Stays (%)

## Fort Lauderdale Month Trip Started

TRIP TIMING

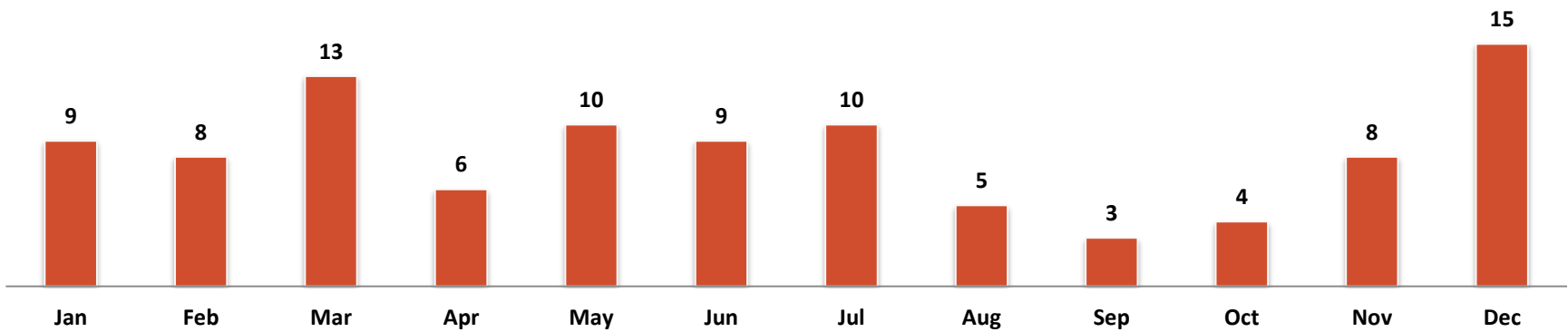


Chart 16 • Segment: 2016-2017 Overnight Leisure Person-Stays (%)



## Fort Lauderdale Month Trip Started – Florida Resident

TRIP TIMING

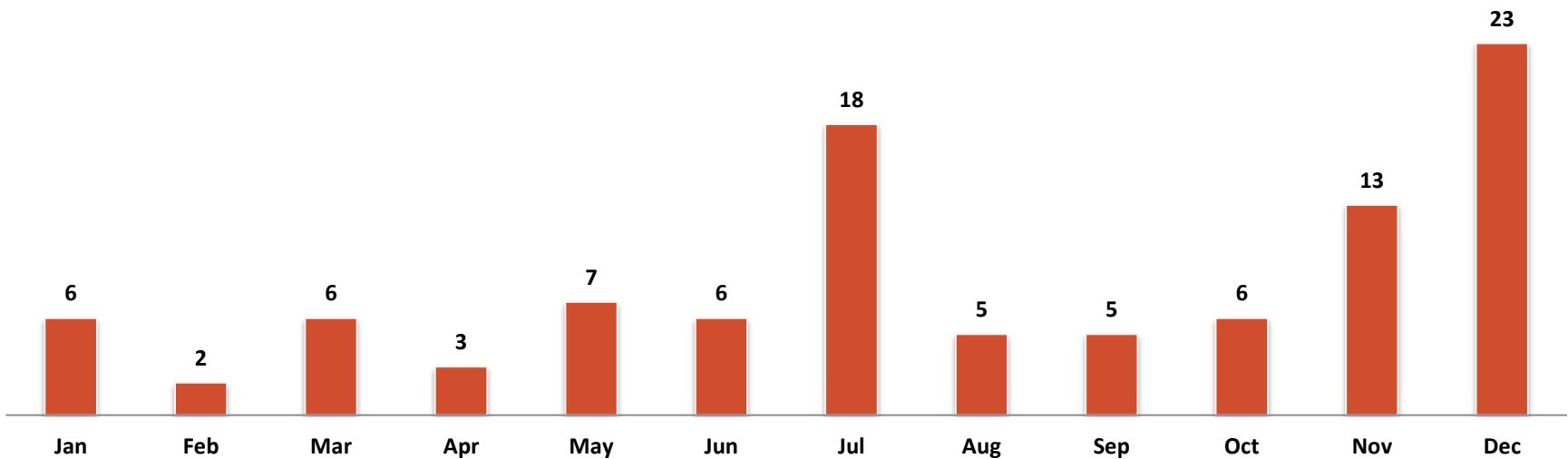


Chart 17 • Segment: 2016-2017 Overnight Leisure Person-Stays (%)

# Trip Timing by Quarter: U.S., Fort Lauderdale, Miami/Dade, Business

TRIP TIMING

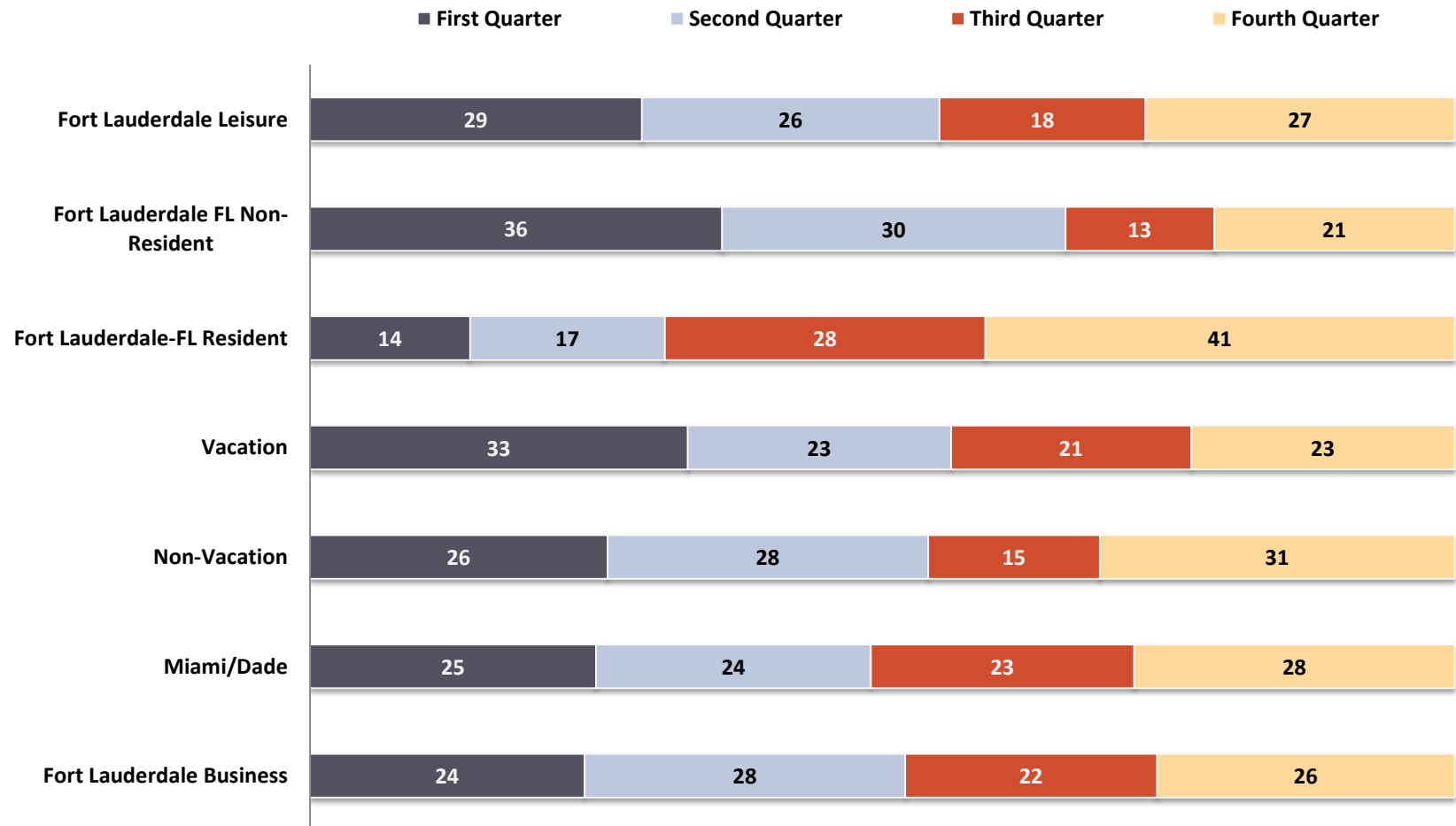


Chart 18 • Segment: 2016-2017 Overnight Leisure Person-Stays (%)

## Fort Lauderdale Avg. Party per Trip Spending by Quarter

TRIP TIMING

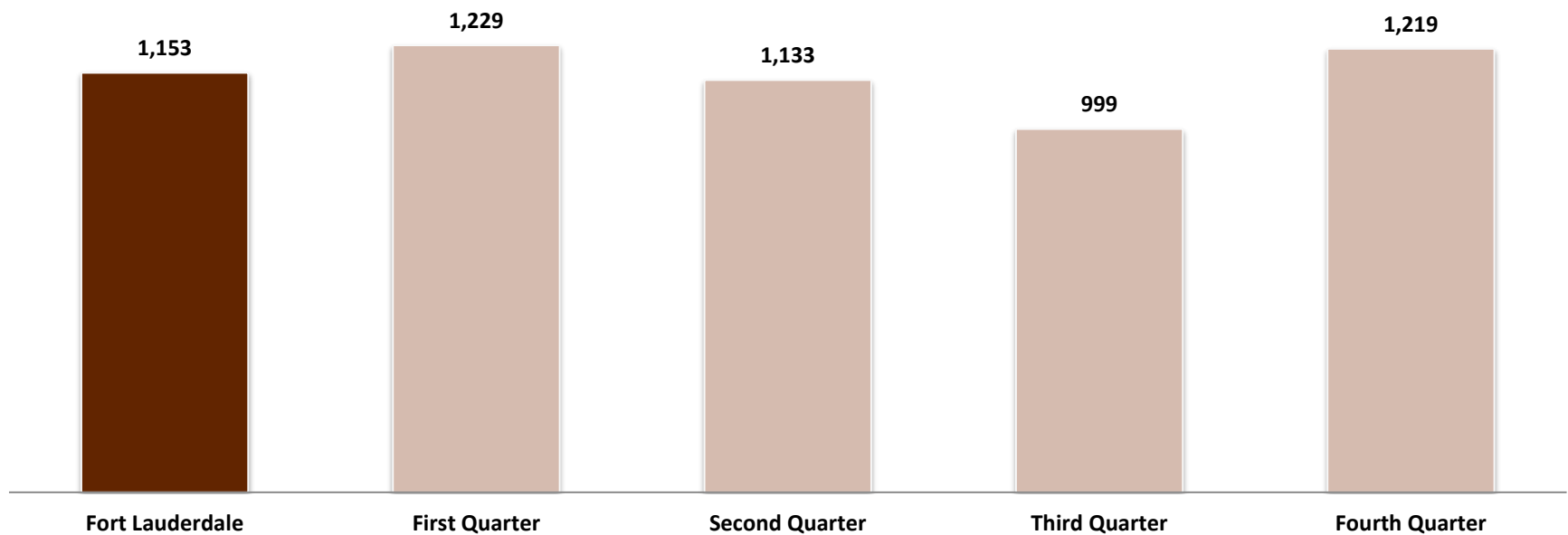


Chart 19 • Segment: 2015-2017 Overnight Leisure Stays (\$)

# Fort Lauderdale Trip Timing Comparison by Quarter

TRIP TIMING

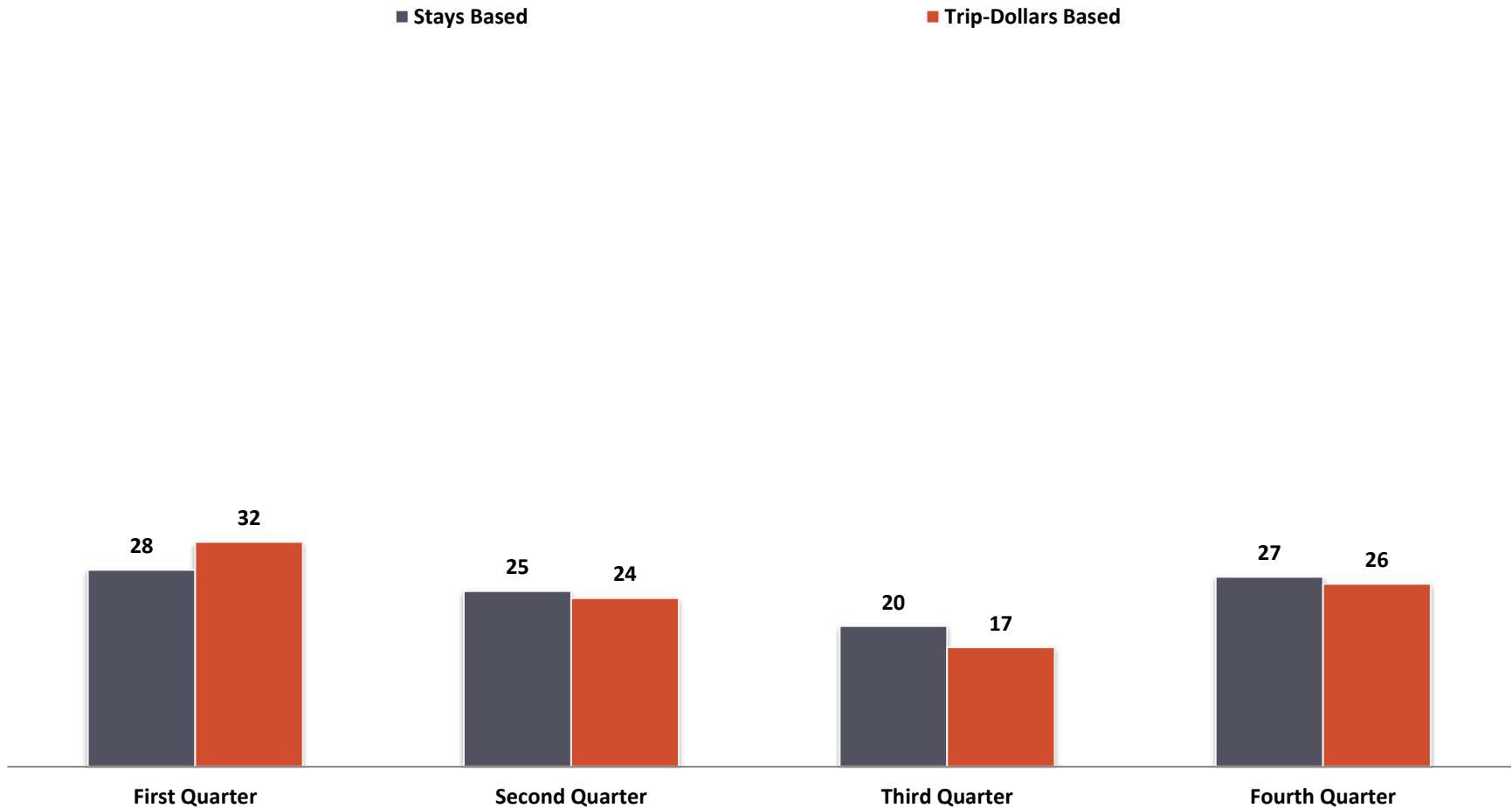


Chart 20 • Segment: 2015-2017 Overnight Leisure (%)

# Purpose of Stay Distribution: U.S., Fort Lauderdale, Miami/Dade

TRIP CHARACTERISTICS

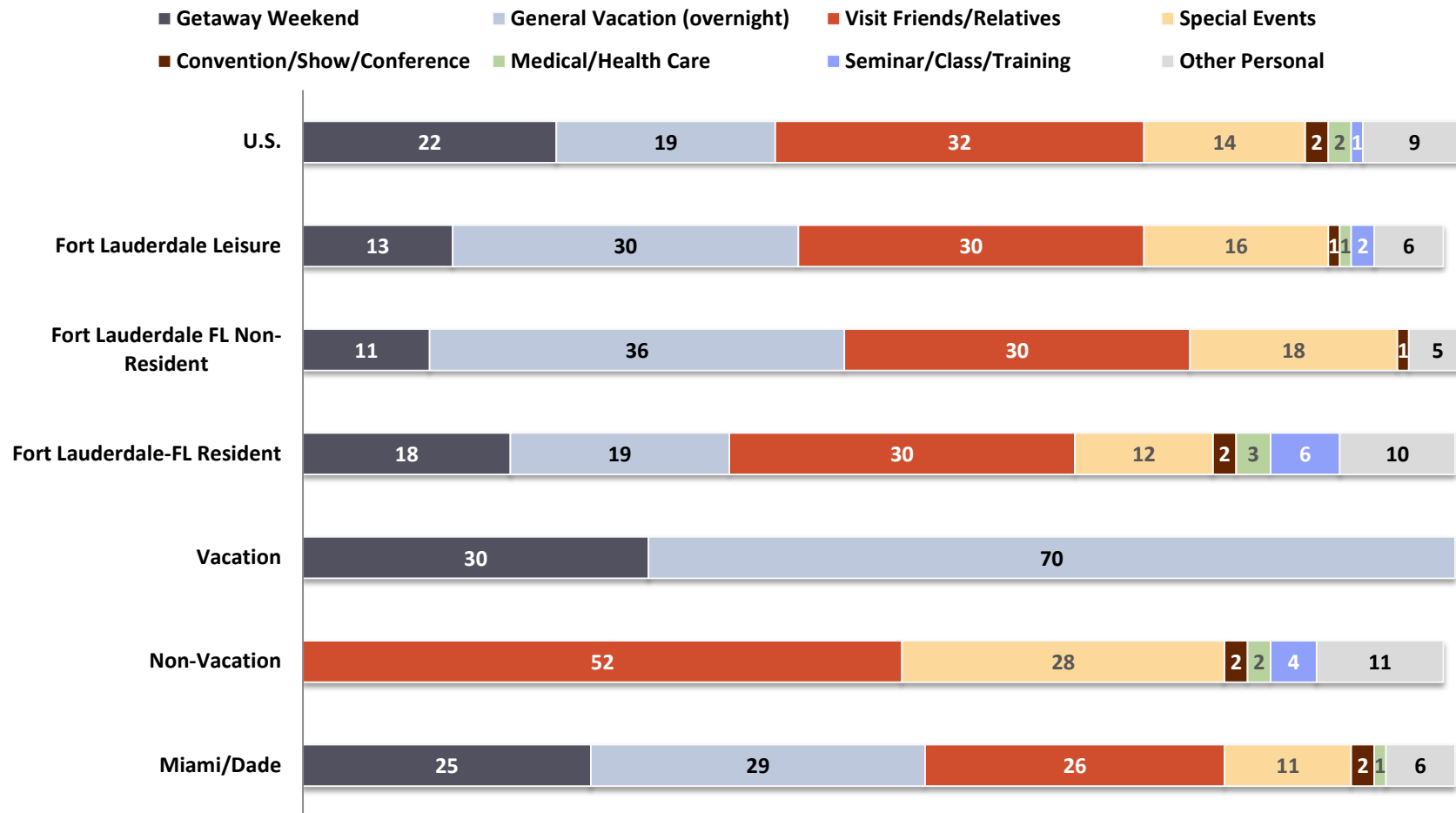


Chart 21 • Segment: 2016-2017 Overnight Leisure Person-Stays (%)

# Purpose of Stay Distribution: Fort Lauderdale Business

## TRIP CHARACTERISTICS

■ Convention      ■ Seminar/Training      ■ Other Group Meeting      ■ Consulting/Client Services      ■ Inspection/Audit  
 ■ Construction/Repair      ■ Sales/Purchasing      ■ Government/Military      ■ Other Business

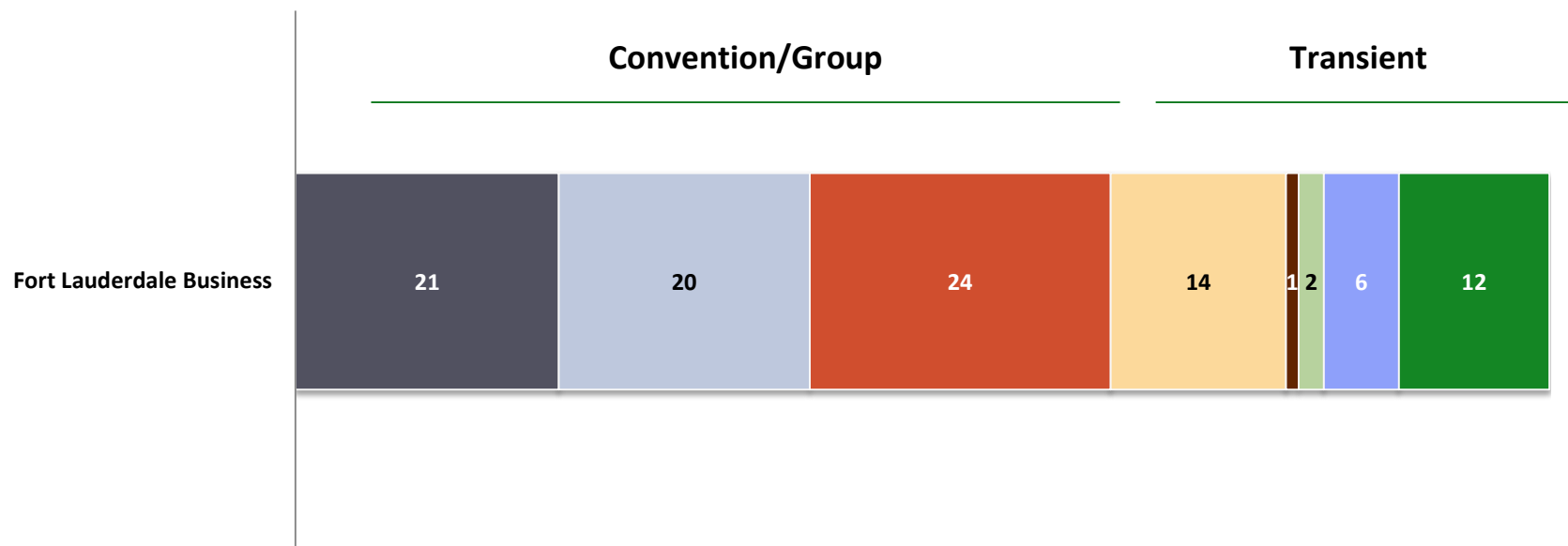


Chart 22 • Segment: 2016-2017 Overnight Business Person-Stays (%)

## Fort Lauderdale Avg. Party per Trip Spending by Purpose of Stay - Leisure

TRIP CHARACTERISTICS

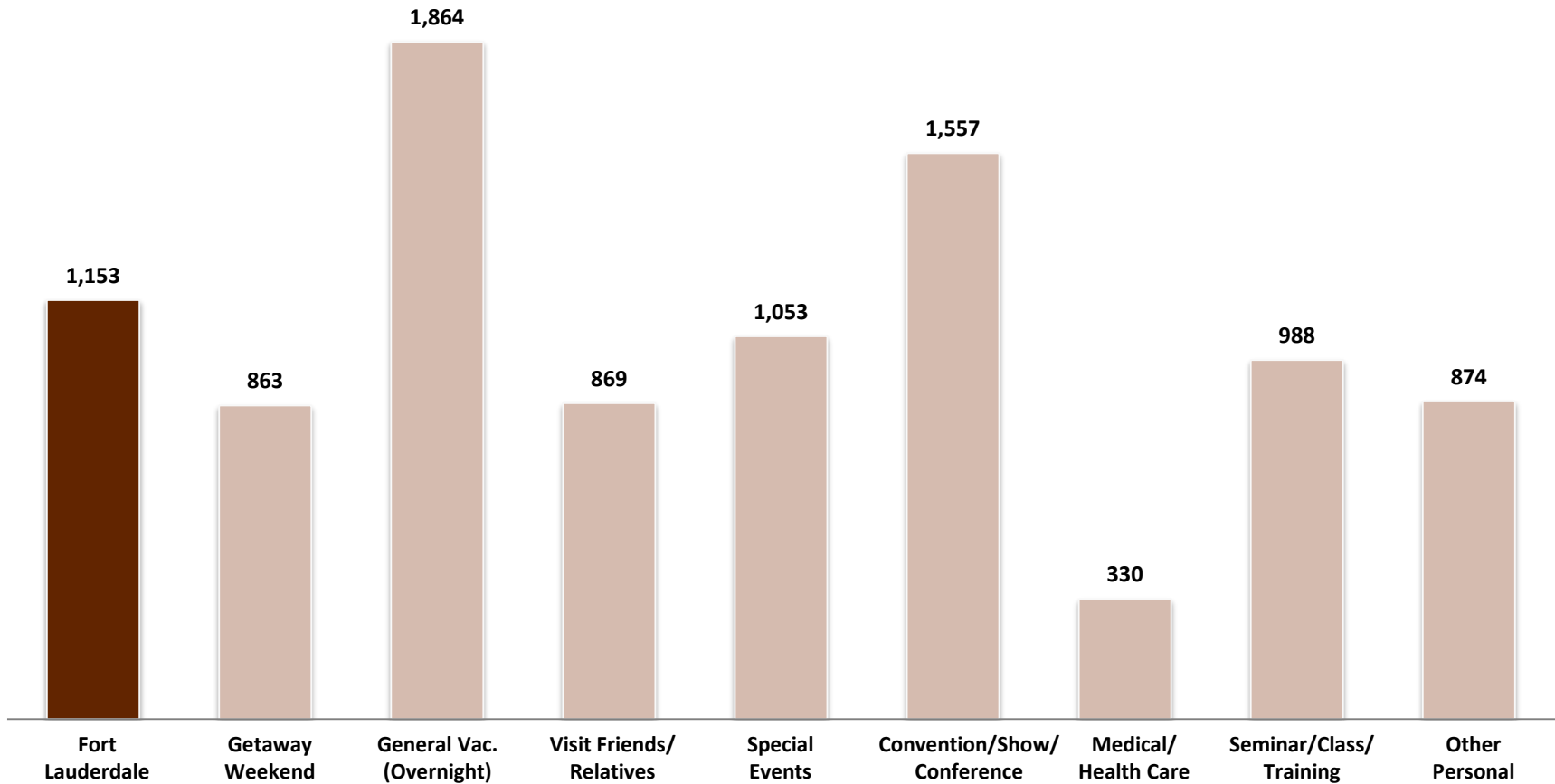


Chart 23 • Segment: 2015-2017 Overnight Leisure Stays (\$)

## Fort Lauderdale Avg. Party per Trip Spending by Purpose of Stay - Business

TRIP CHARACTERISTICS

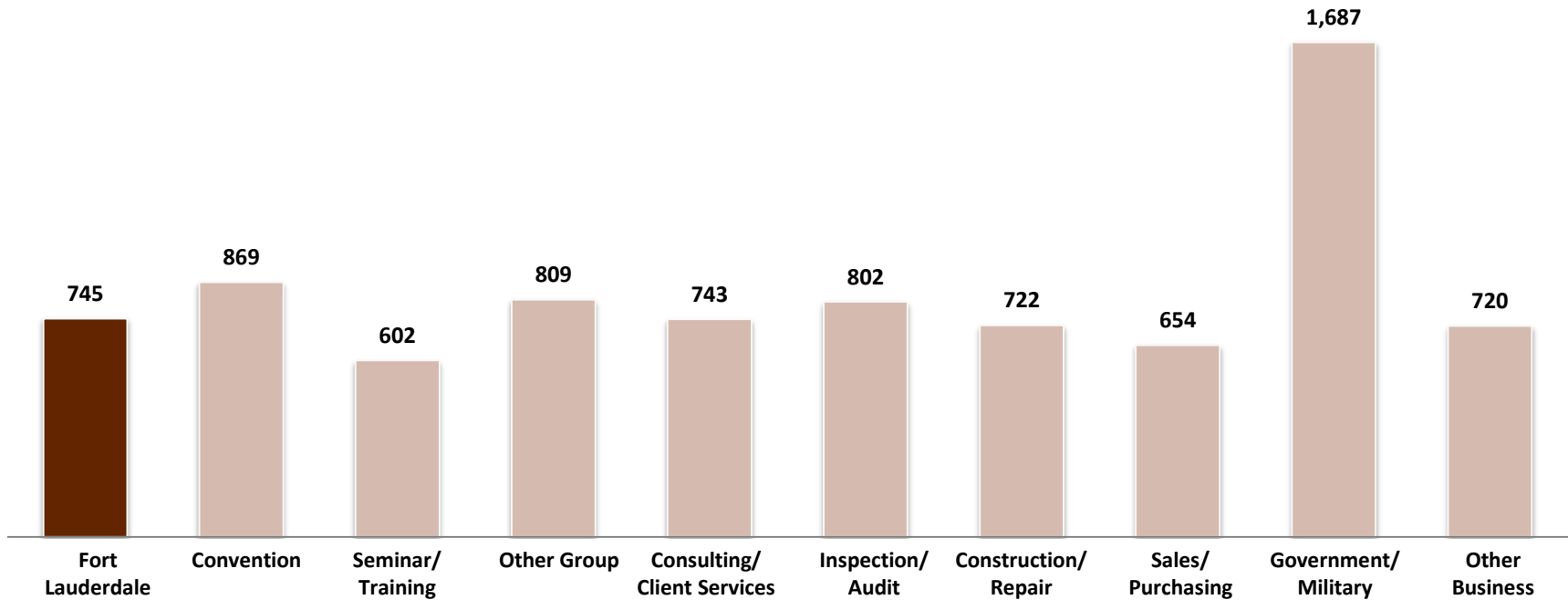


Chart 24 • Segment: 2015-2017 Overnight Leisure Stays (\$)



# Fort Lauderdale Purpose of Stay Comparison - Leisure

TRIP CHARACTERISTICS

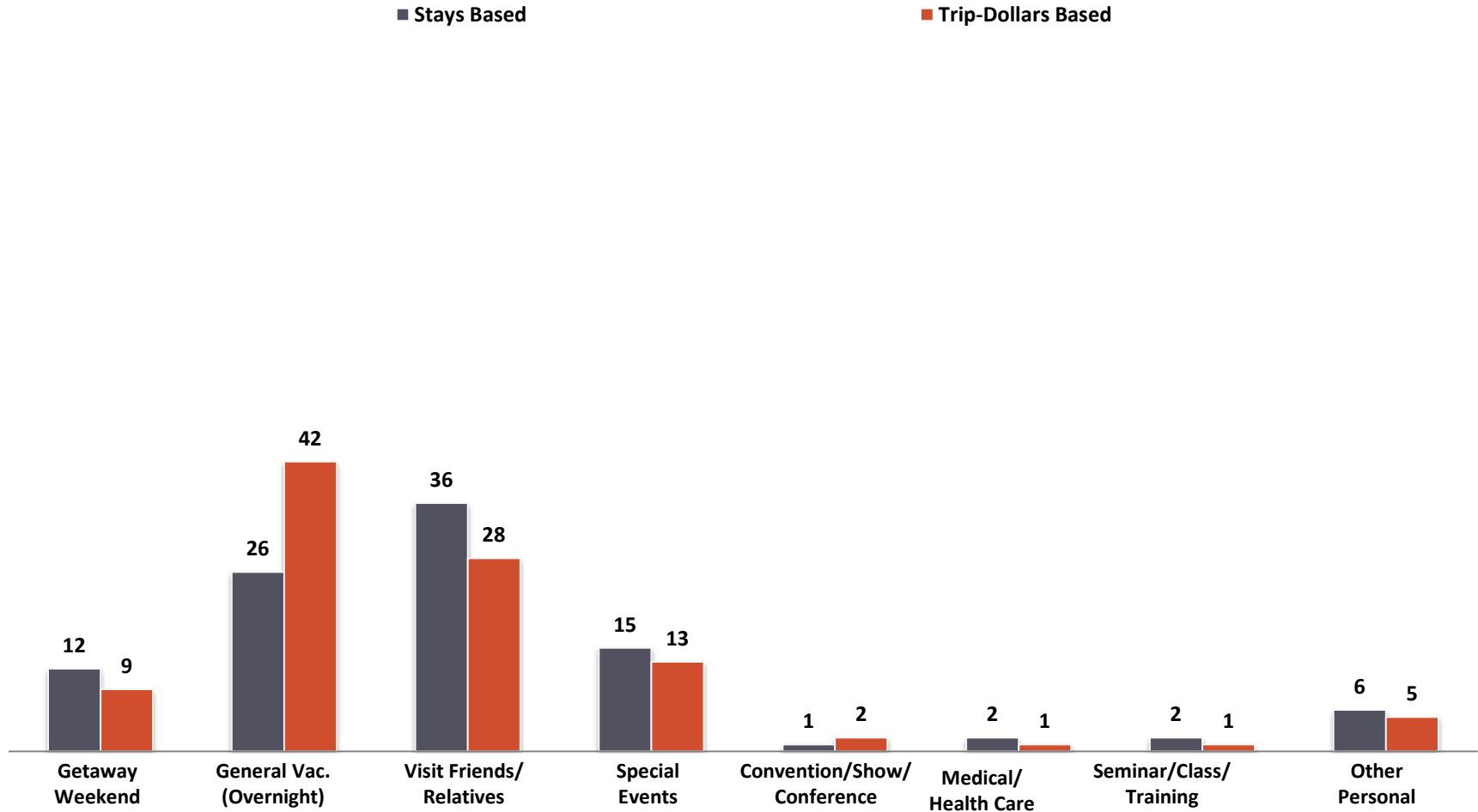


Chart 25 • Segment: 2015-2017 Overnight Leisure (%)

## Fort Lauderdale Purpose of Stay Comparison - Business

TRIP CHARACTERISTICS

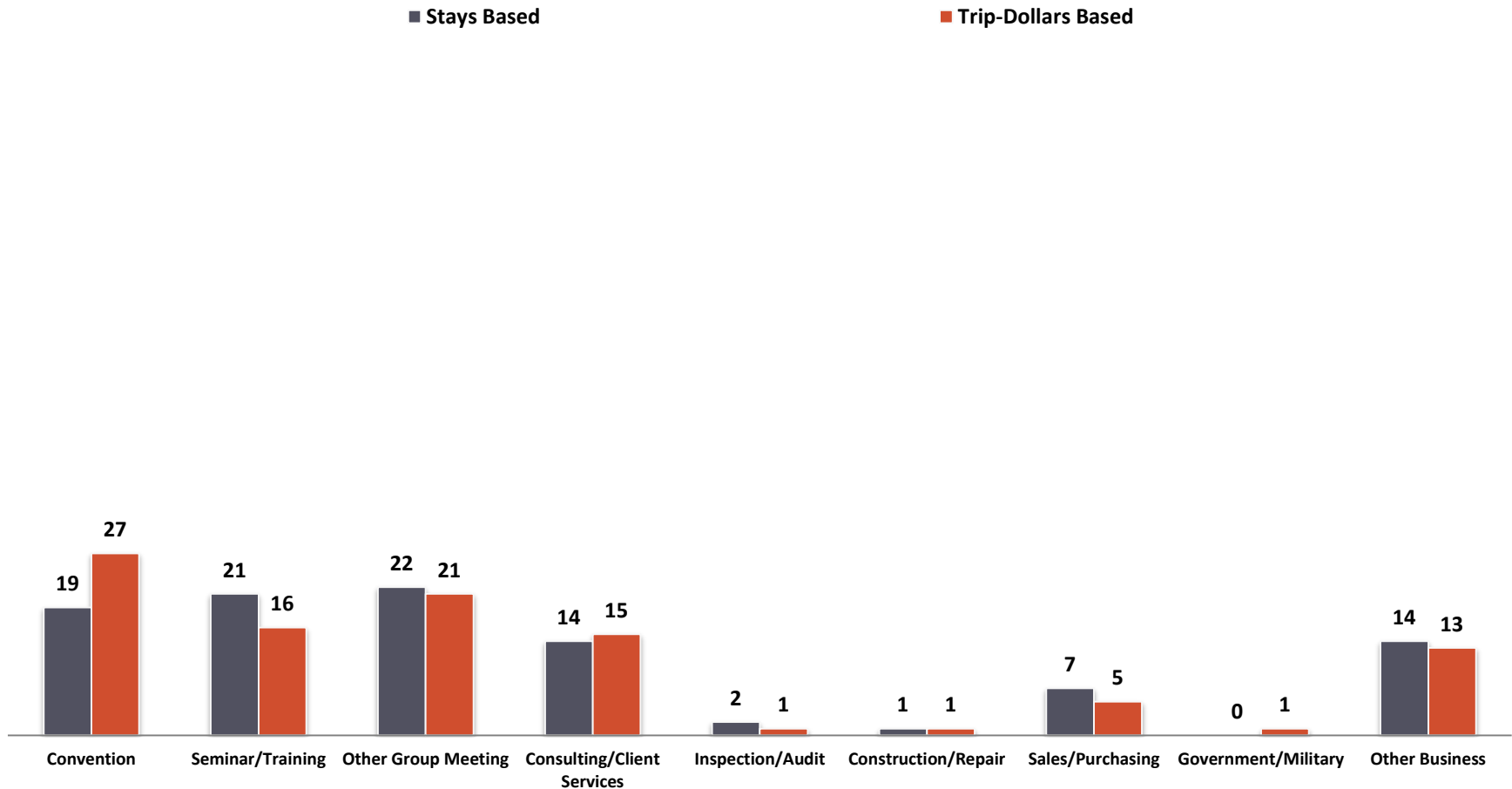


Chart 26 • Segment: 2015-2017 Overnight Leisure (%)

# Travel Party Composition: U.S., Fort Lauderdale, Miami/Dade, Business

TRIP CHARACTERISTICS

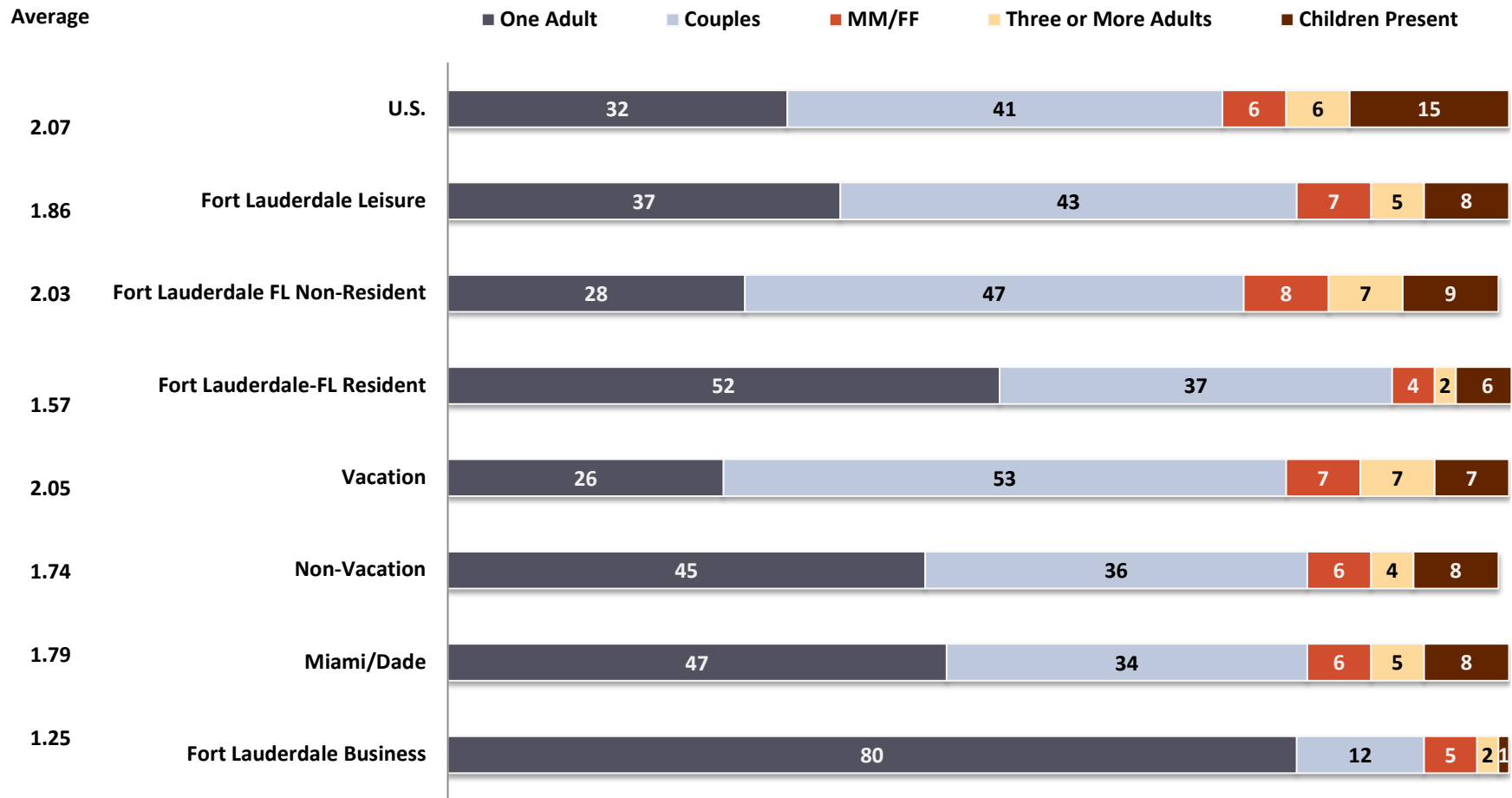


Chart 27 • Segment: 2016-2017 Overnight Leisure Person-Stays (%)

GLOSSARY

## Children Present

Is defined as one or more adults accompanied by one or more persons under age 18. The child necessarily has to live in the household.

## MM/FF

Include either two females or two males from different households traveling together.

# Average Travel Party Size Overview: U.S., Fort Lauderdale and Competitors

TRIP CHARACTERISTICS

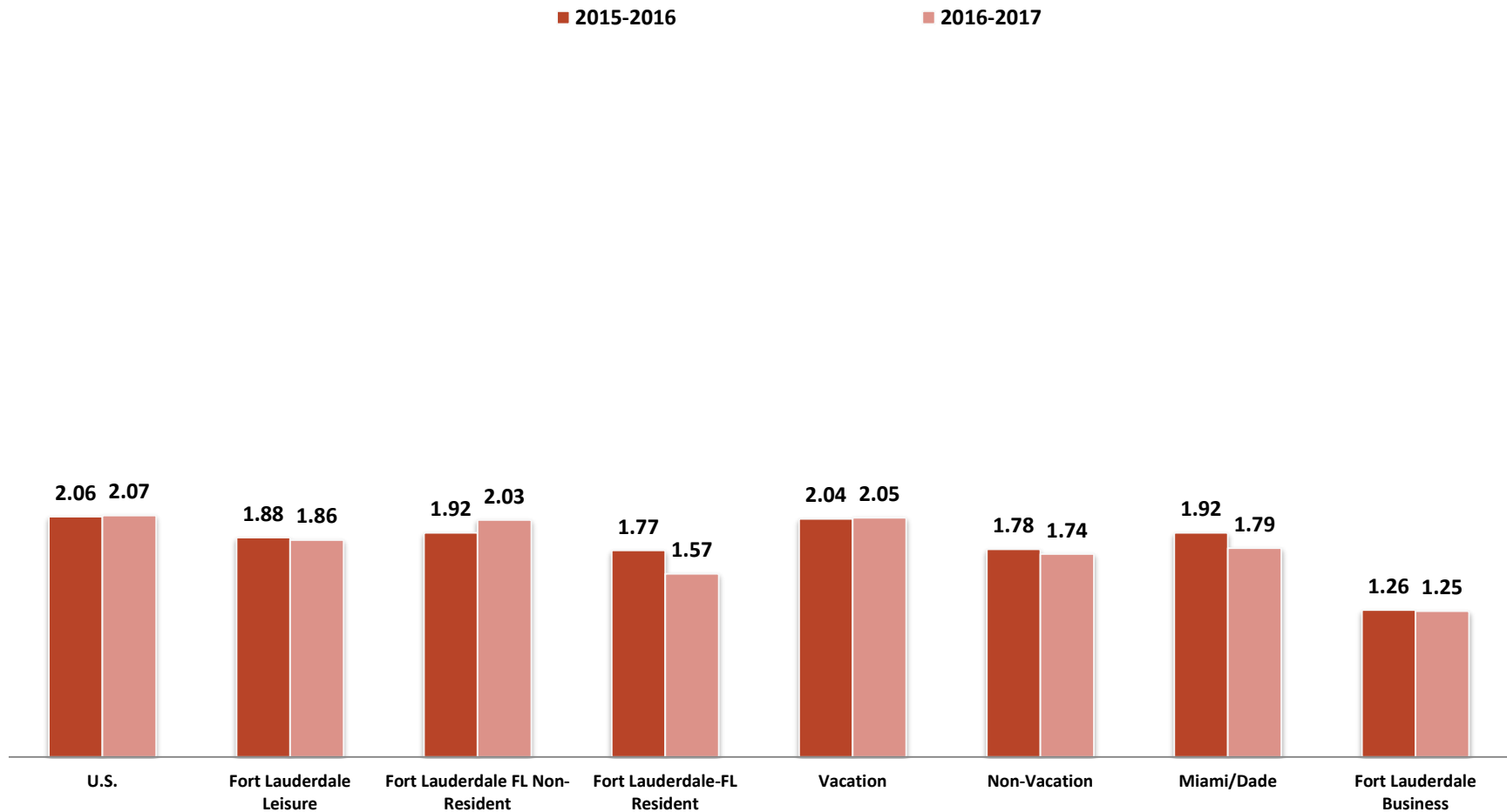


Chart 28 • Segment: 2016-22017/2015-2016 Overnight Leisure Stays

## Fort Lauderdale Avg. Party per Trip Spending by Travel Party Composition

TRIP CHARACTERISTICS

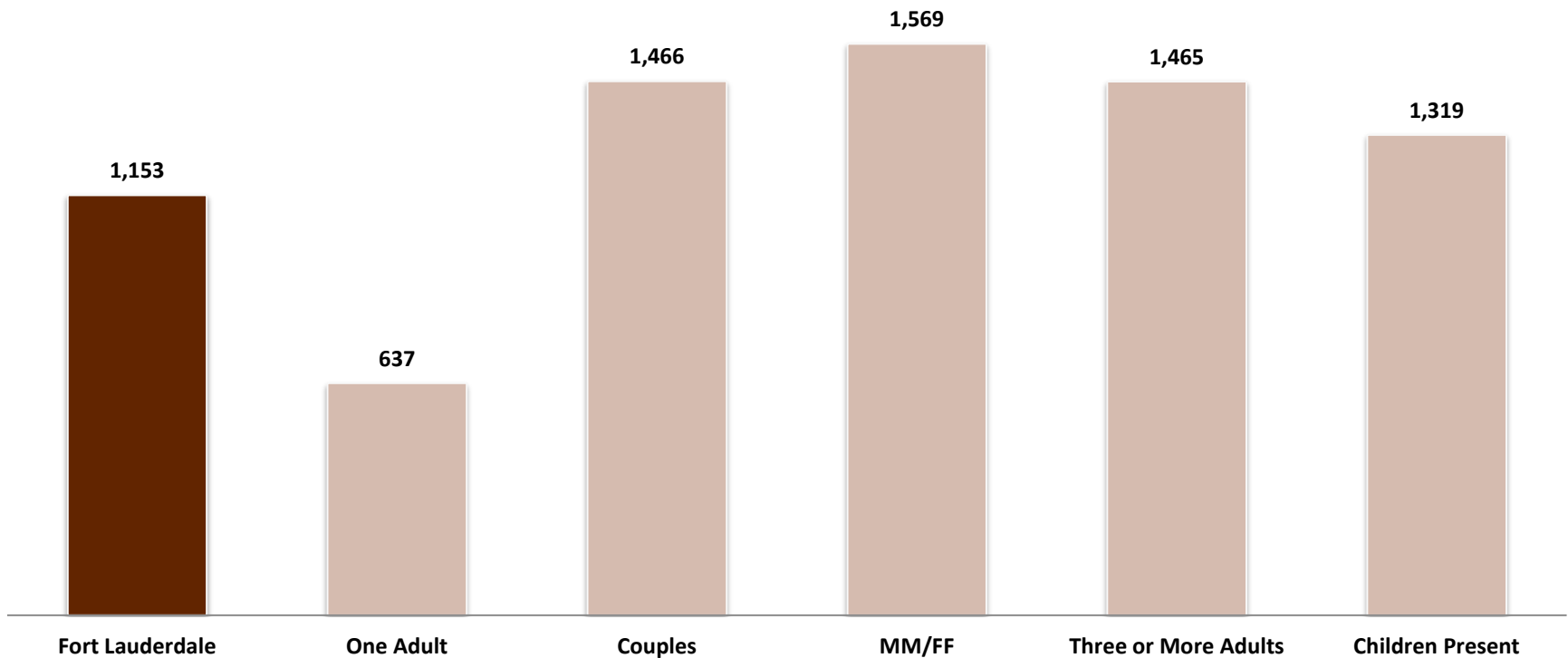


Chart 29 • Segment: 2015-2017 Overnight Leisure Stays (\$)

# Fort Lauderdale Travel Party Comparison

## TRIP CHARACTERISTICS

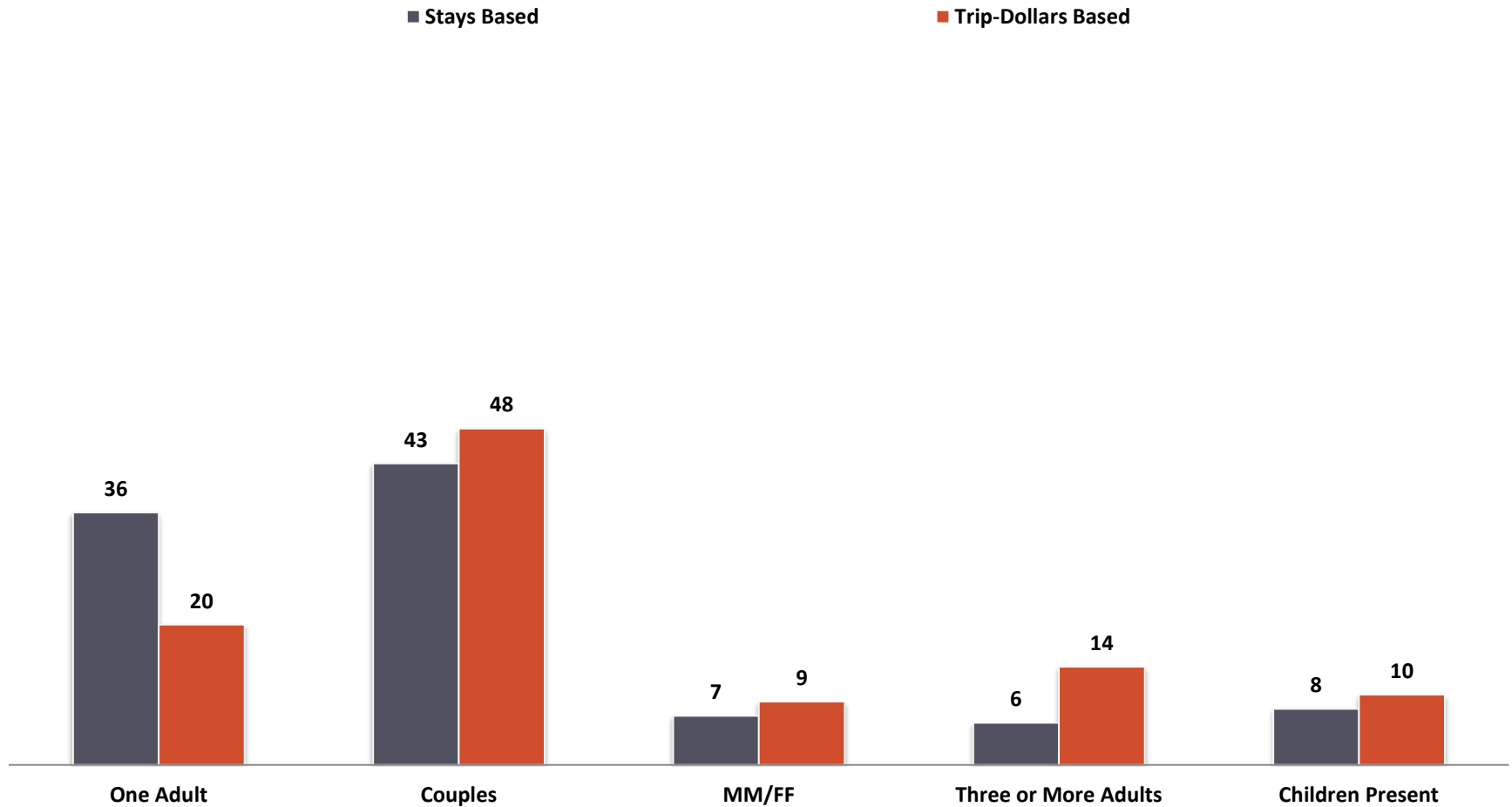


Chart 30 • Segment: 2015-2017 Overnight Leisure (%)

# Stay Length Distribution: U.S., Fort Lauderdale, Miami/Dade, Business

TRIP CHARACTERISTICS

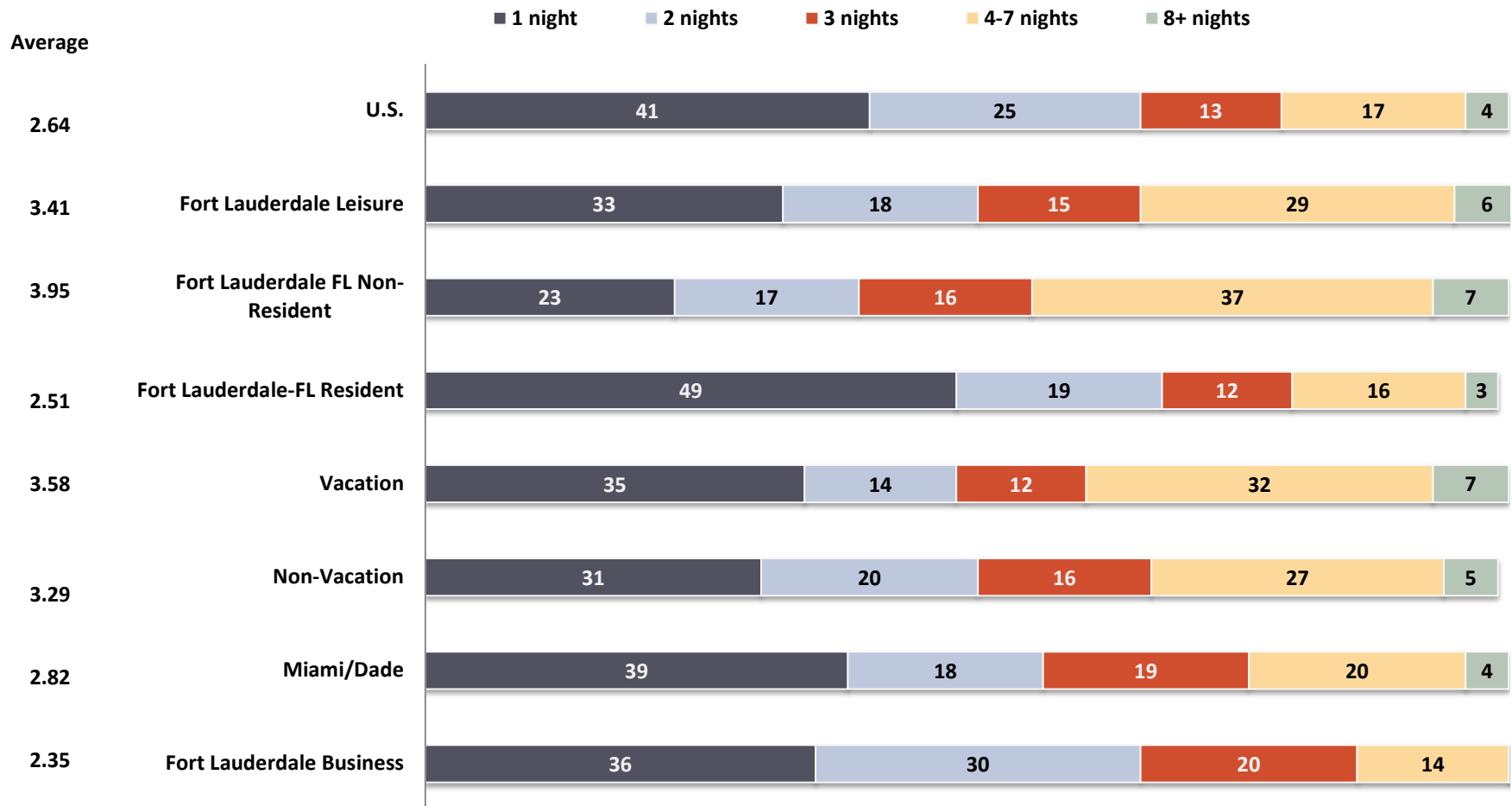


Chart 31 • Segment: 2016-2017 Overnight Leisure Person-Stays (%)

# Average Stay Length Overview: U.S., Fort Lauderdale and Competitors

## TRIP CHARACTERISTICS

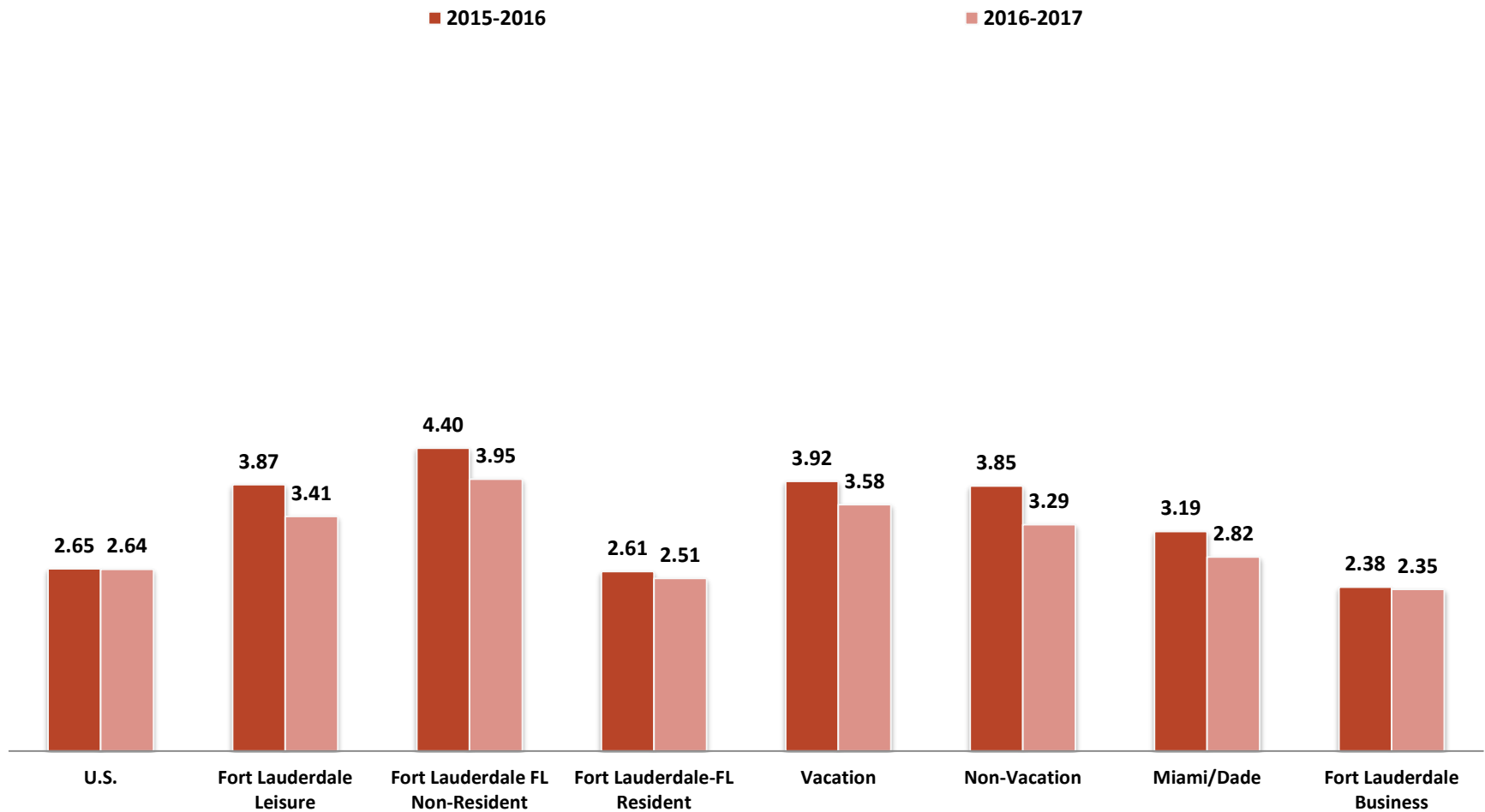


Chart 32 • Segment: 2016-2017/2015-2016 Overnight Leisure Stays (excl. Day Trips)



## Fort Lauderdale Avg. Party per Trip Spending by Stay Length

TRIP CHARACTERISTICS

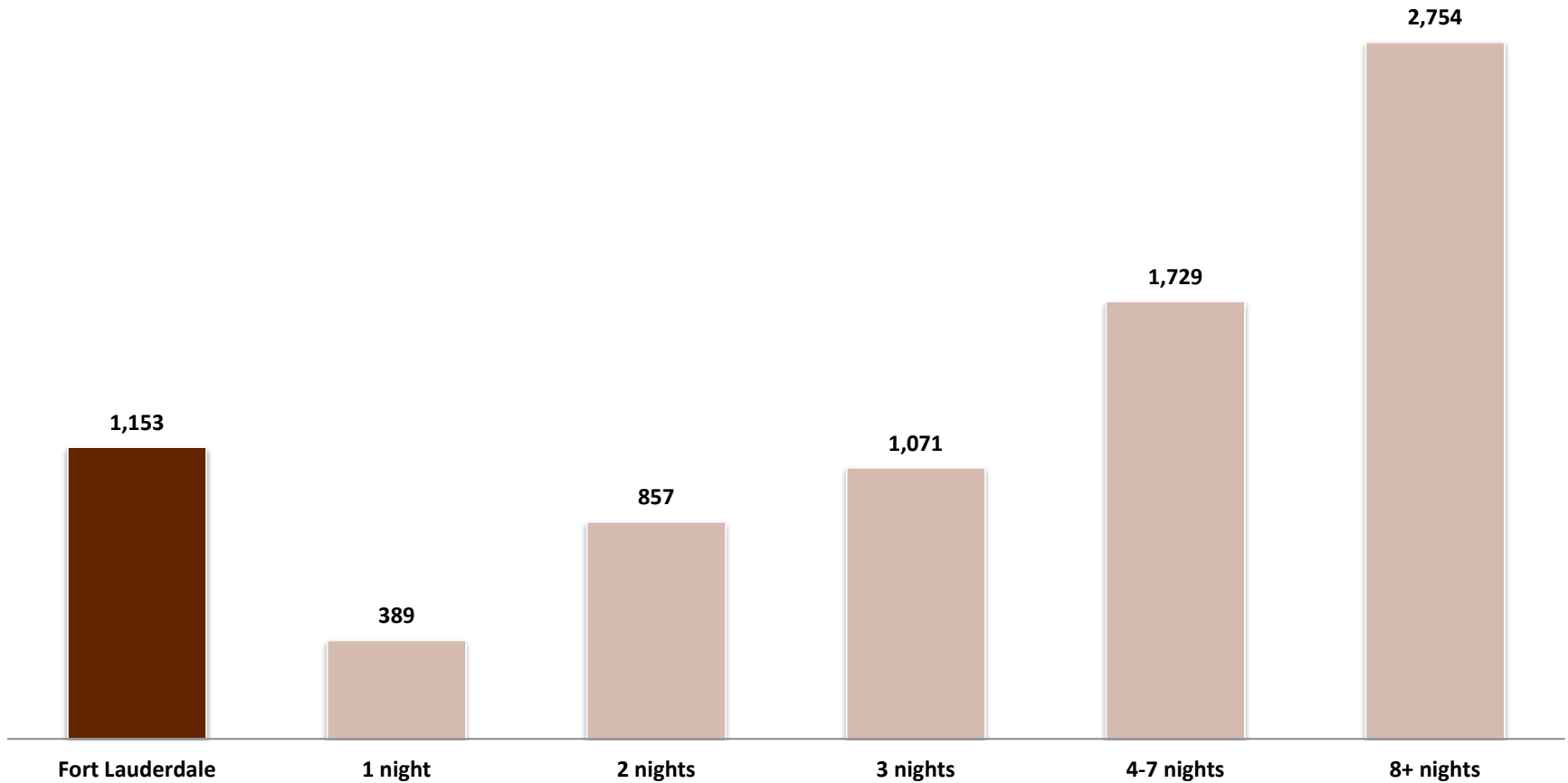


Chart 33 • Segment: 2015-2017 Overnight Leisure Stays (\$)

# Fort Lauderdale Stay Length Comparison

TRIP CHARACTERISTICS

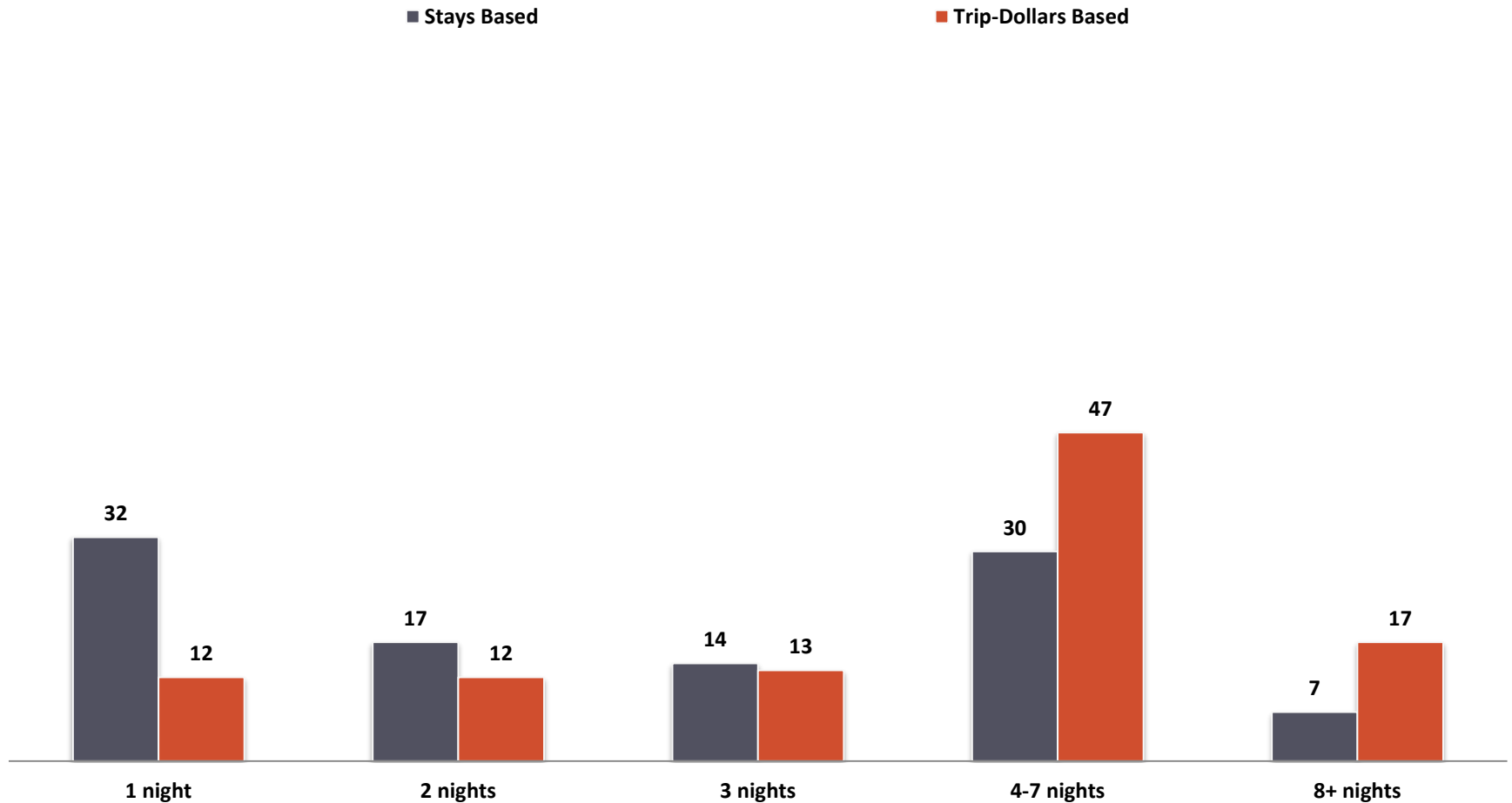


Chart 34 • Segment: 2015-2017 Overnight Leisure (%)

# Daily Spending Per Person by Category: U.S., Fort Lauderdale, Miami/Dade, Business

TRIP CHARACTERISTICS

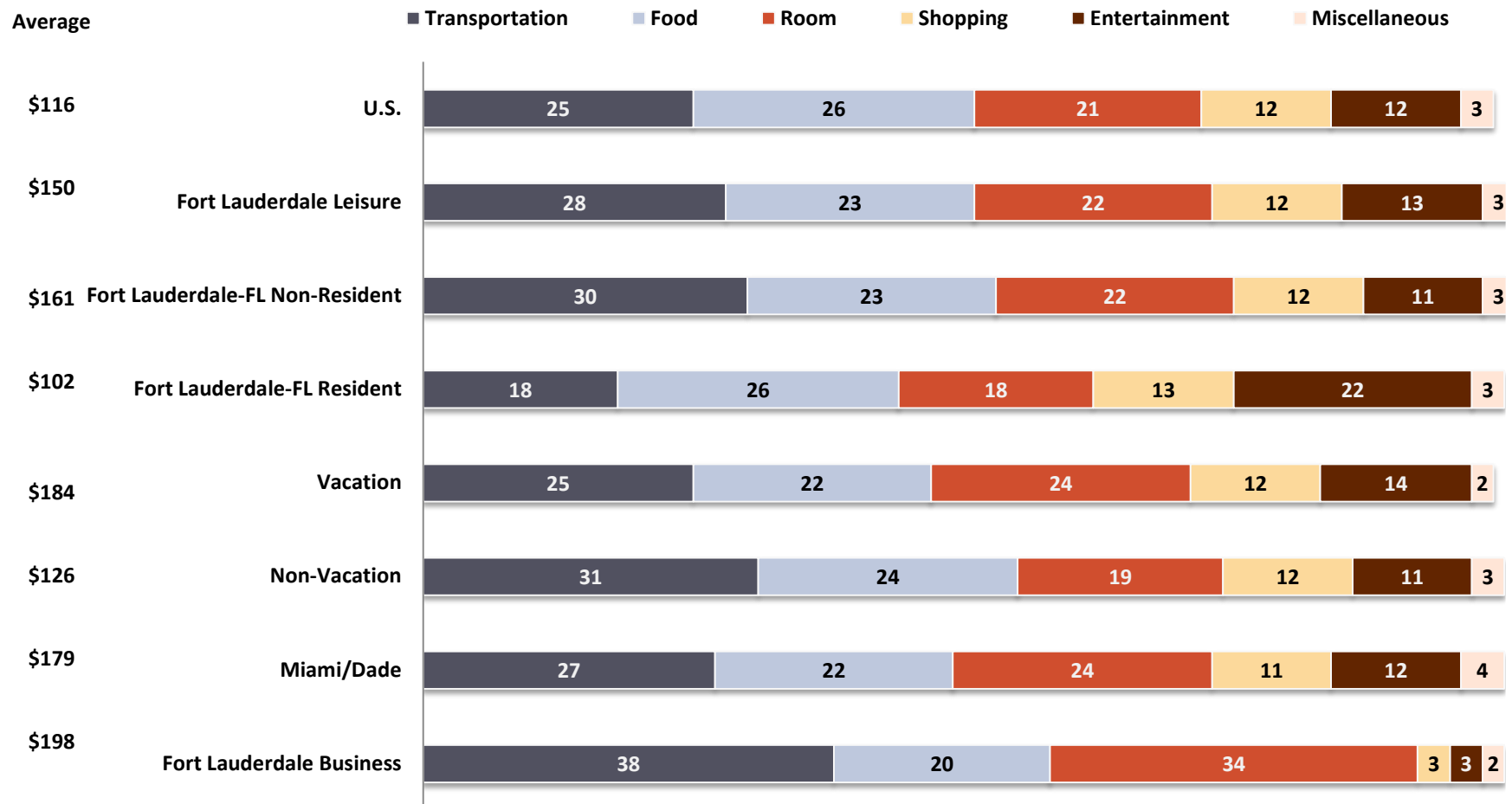


Chart 35 • Segment: 2016-2017 Overnight Leisure Person-Days (%)

# List of All DKSA Activities

## ACTIVITY PARTICIPATION

DKSA 2016 ACTIVITIES		
Attractions	Holiday Celebration	Hunting
Amateur Sports	Reunion/Graduation	Fishing
Professional Sports Event	Wedding	Hiking
Gambling	Funeral/Memorial	Biking
Night Life	Other Personal Celebration	Tennis
Show: Boat, Car, Home	Libation and Culinary	Water Sports
Theme/Amusement/Water Park	Culinary/Dining Experience	Extreme Adventure Sports
Zoo/Aquarium	Winery/Distillery/Brewery	Snow/Winter Sports
Culture	Nature	General
Concert, Theater, Dance	Beach/Waterfront	Shopping
Festival/Fairs	Camping	Real Estate (buy/sell)
Historic Sites	Eco/Sustainable Travel	Medical/Health/Doctor Visit
Museum, Art Exhibits, etc.	Wildlife Viewing	Service/Volunteerism/Charity
Movies	Parks (National/State)	Religious/Faith Based Event
Touring/Sightseeing	Outdoor Sports	Spa
Family/Life Events	Boating/Sailing	Other Activities (any)
Visit Friends/Relatives	Golfing	Business/Work

# Top Activities at the Destination

## ACTIVITY PARTICIPATION

	U.S.	Fort Lauderdale	Fort Lauderdale Non-Resident	Fort Lauderdale Resident	Vacation	Non-Vacation	Dade County
Beach/Waterfront	16	44	53	30	58	35	34
Visit Friends/Relatives	36	39	38	40	25	47	55
Culinary/Dining Experience	28	33	36	26	31	34	29
Shopping	24	27	29	25	35	23	26
Nightlife	11	20	18	24	25	17	25
Touring/Sightseeing	14	15	18	10	20	11	7
Gambling	8	15	13	19	18	13	16
Movies	7	10	8	11	8	10	6
Holiday Celebration	7	10	7	14	6	12	11
Parks (national/state)	13	9	11	6	10	8	8
Museums, Art Exhibits, etc.	9	9	10	7	8	10	8
Live Music	9	9	7	13	8	10	8
Festival/Fairs	6	7	5	10	6	8	5
Other Personal Celebrations	8	7	7	5	5	7	5

Chart 36 • Segment: 2016-2017 Overnight Leisure Stays (%)

## Top Activities at the Destination (cont.)

### ACTIVITY PARTICIPATION

	U.S.	Fort Lauderdale	Fort Lauderdale Non-Resident	Fort Lauderdale Resident	Vacation	Non-Vacation	Dade County
Religious/Faith Based Conference	3	6	4	11	1	10	2
Historic Sites	12	5	7	1	6	4	8
Medical/Health/Doctor Visit	2	5	3	9	2	7	2
Wildlife Viewing	4	4	5	2	6	3	5
Boating/Sailing	3	4	4	1	0	4	5
Biking	2	4	3	4	6	2	6
Wedding	3	3	4	2	2	4	5
Water Sports	2	3	3	2	5	2	12
Fishing	3	3	3	2	4	2	4
Amateur Sports	4	3	3	3	0	5	2
Business/Work	1	3	2	3	2	3	1
Zoo/Aquarium	4	2	3	0	4	0	6
Real Estate (buy/sell)	1	2	2	2	3	1	0
Theme/Amusement/Water Parks	5	2	2	1	3	1	4

Chart 36 • Segment: 2016-2017 Overnight Leisure Stays (%)

## Top Activities at the Destination (cont.)

### ACTIVITY PARTICIPATION

	U.S.	Fort Lauderdale	Fort Lauderdale Non-Resident	Fort Lauderdale Resident	Vacation	Non-Vacation	Dade County
Professional Sports Event	3	2	2	3	1	3	3
Reunion/Graduation	3	2	2	3	1	3	2
Hiking	6	2	2	2	2	2	2
Funeral/Memorial	2	2	1	3	0	3	2
Theater/Dance Performance	4	2	2	2	3	2	5
Golfing	2	1	2	0	2	1	2
Winery/Distillery/Brewery Tours	3	1	2	0	1	1	1
Show: Boat, Car, Home	3	1	1	1	2	1	6
Tennis	0	1	1	0	1	1	2
Spa	1	1	1	0	1	0	3
Eco/Sustainable Travel	1	1	0	2	2	1	1
Extreme/Adventure Sports	1	1	0	1	1	0	1
Service/Volunteerism/Charity	1	0	0	1	0	1	1
Snow/Winter Sports	1	0	0	0	0	0	0
Camping	4	0	0	0	0	0	2
Hunting	1	0	0	0	0	0	0

Chart 36 • Segment: 2016-2017 Overnight Leisure Stays (%)

## Fort Lauderdale Avg. Party per Trip Spending by Activities

ACTIVITY PARTICIPATION

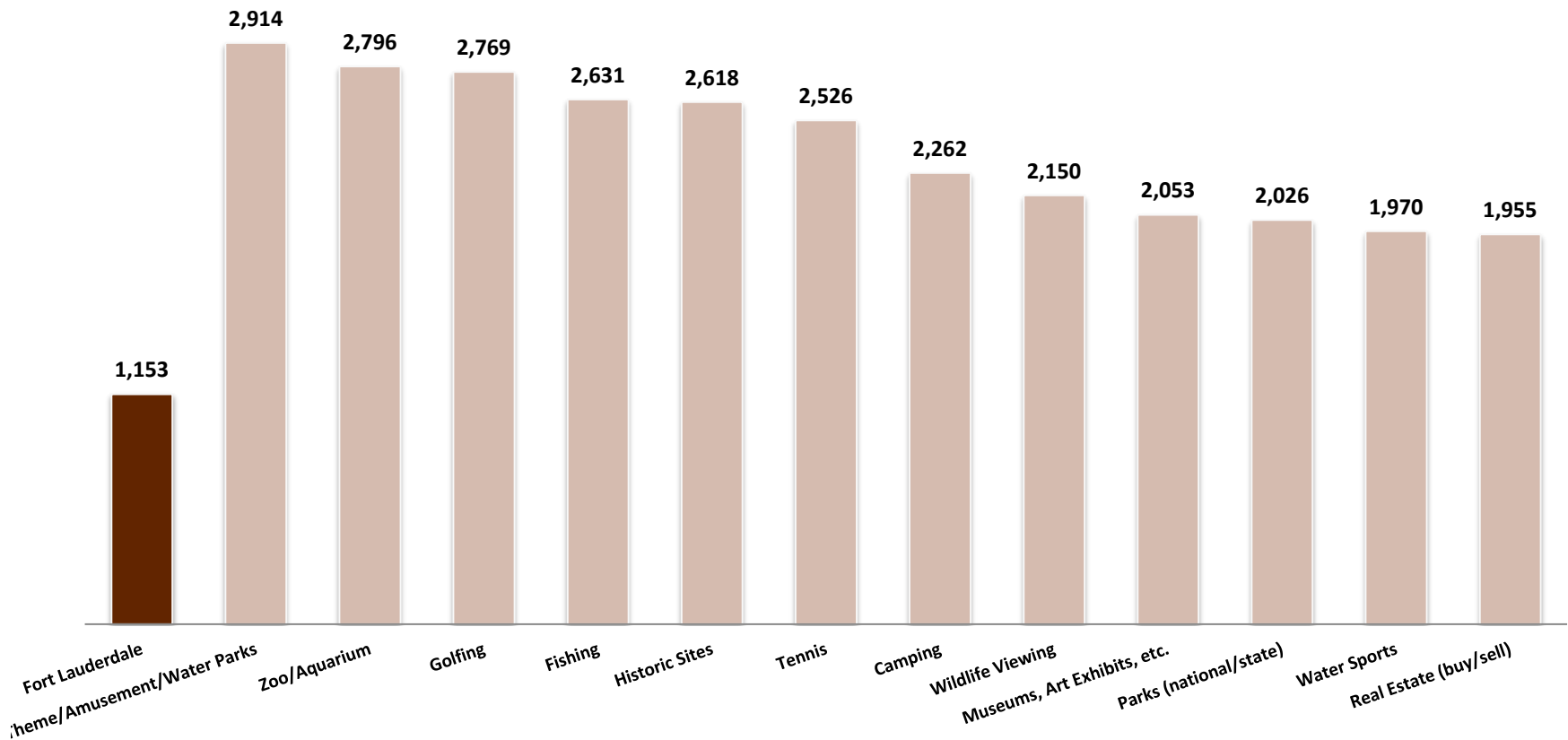


Chart 37 • Segment: 2015-2017 Overnight Leisure Stays (\$)



## Fort Lauderdale Avg. Party per Trip Spending by Activities (cont.)

ACTIVITY PARTICIPATION

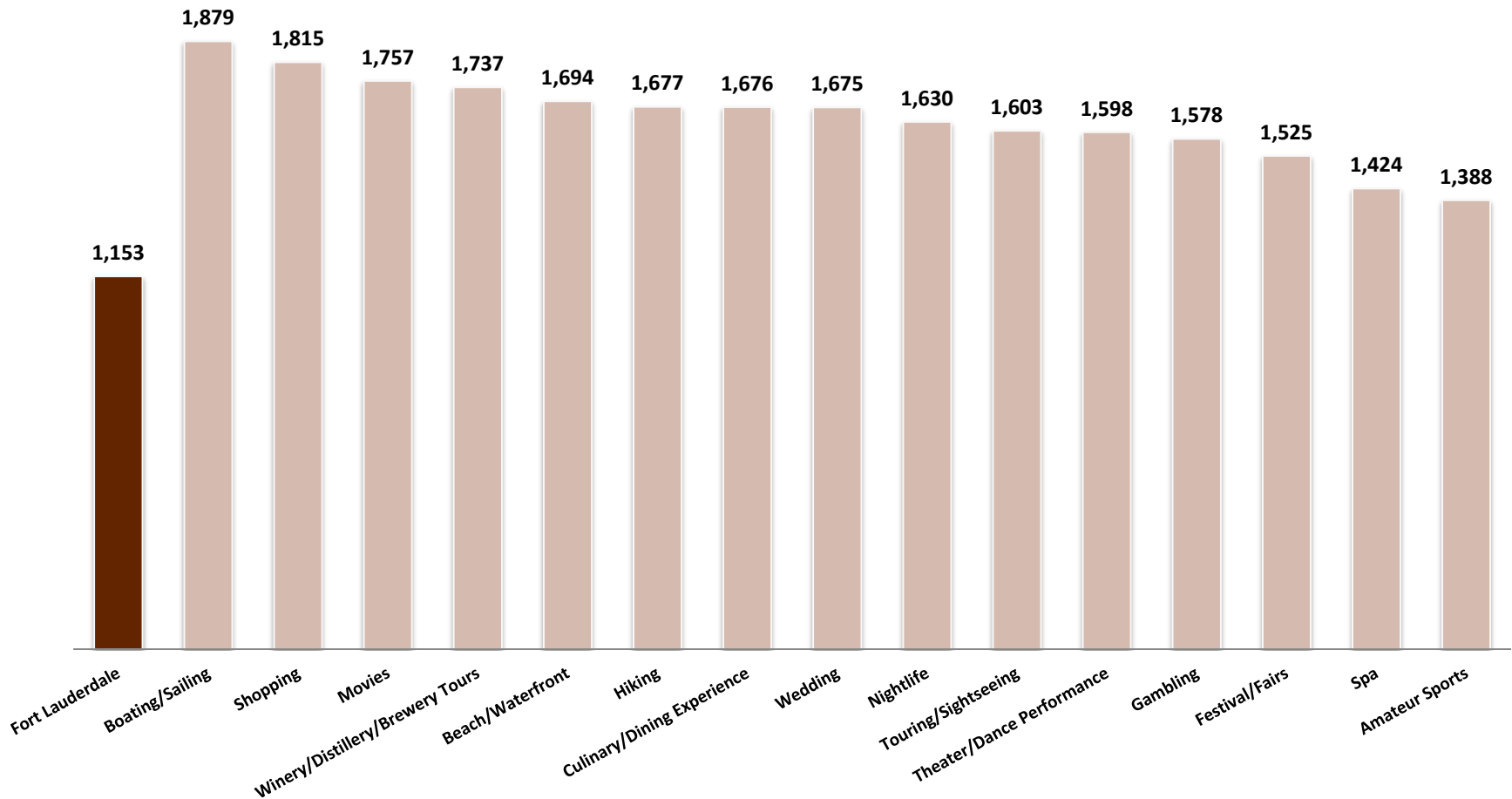


Chart 37 • Segment: 2015-2017 Overnight Leisure Stays (\$)

## Fort Lauderdale Avg. Party per Trip Spending by Activities (cont.)

ACTIVITY PARTICIPATION

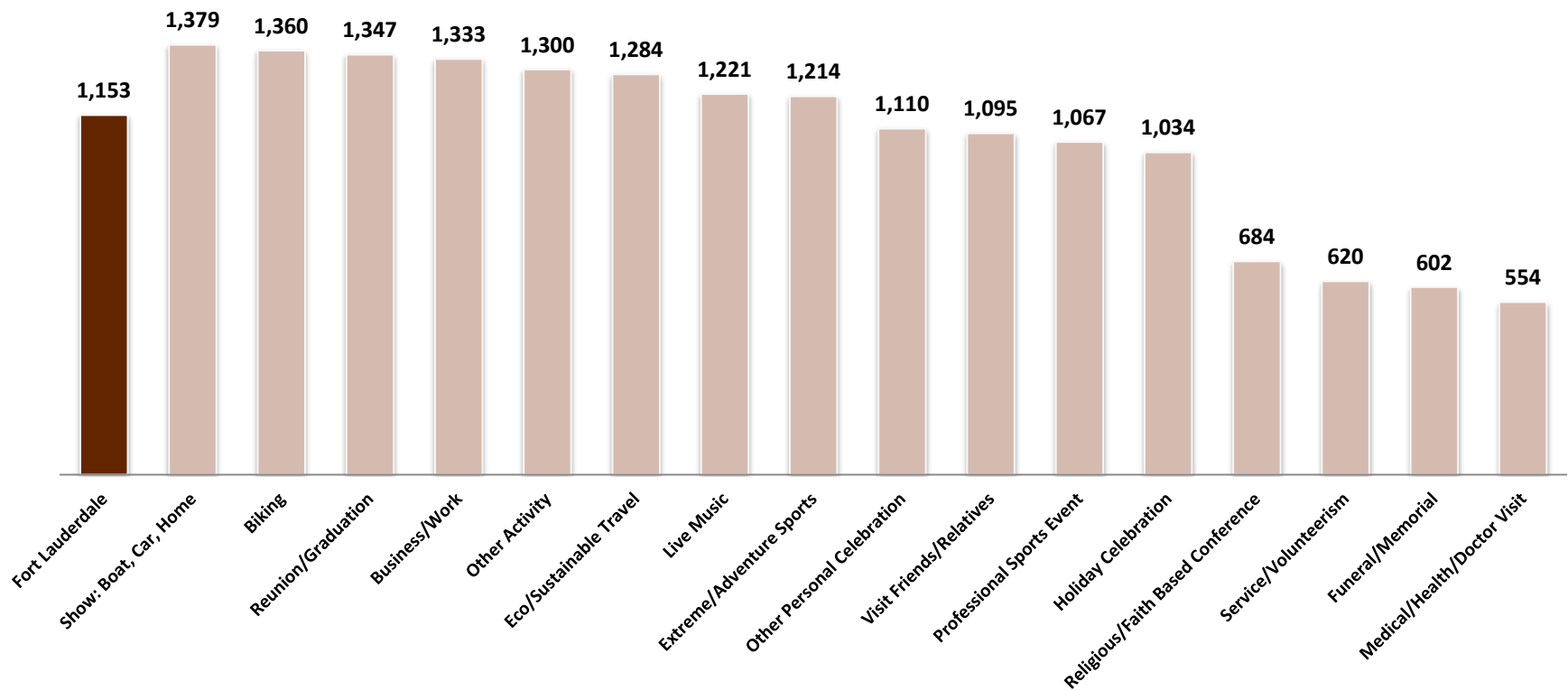


Chart 37 • Segment: 2015-2017 Overnight Leisure Stays (\$)

## Accommodation Type: U.S., Fort Lauderdale, Miami/Dade, Business

ACCOMMODATION

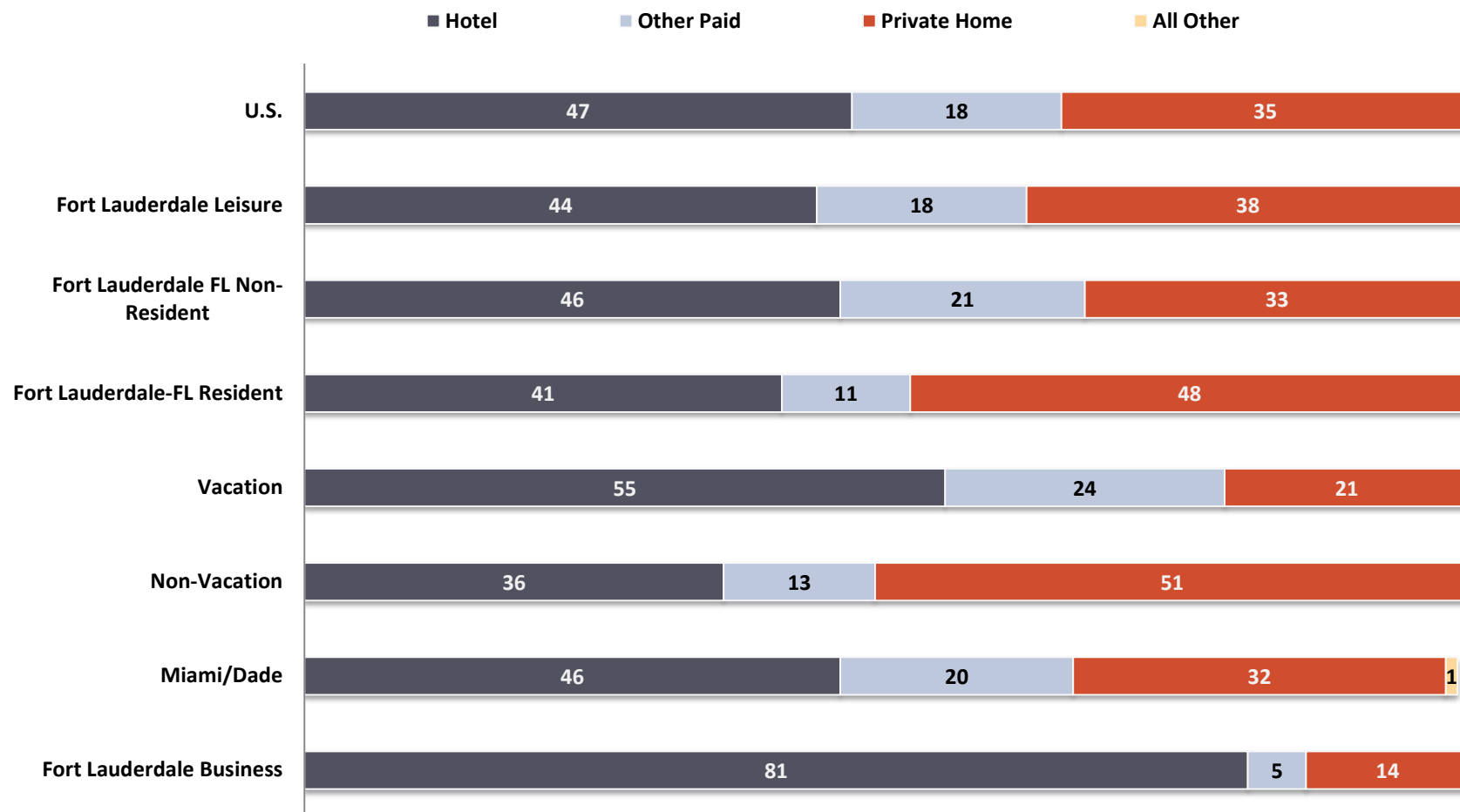


Chart 38 • Segment: 2016-2017 Overnight Leisure Person-Stays (%)

## Accommodation Segment- Paid Hotel/Motel Only: U.S., Fort Lauderdale, Miami/Dade, Business

ACCOMMODATION

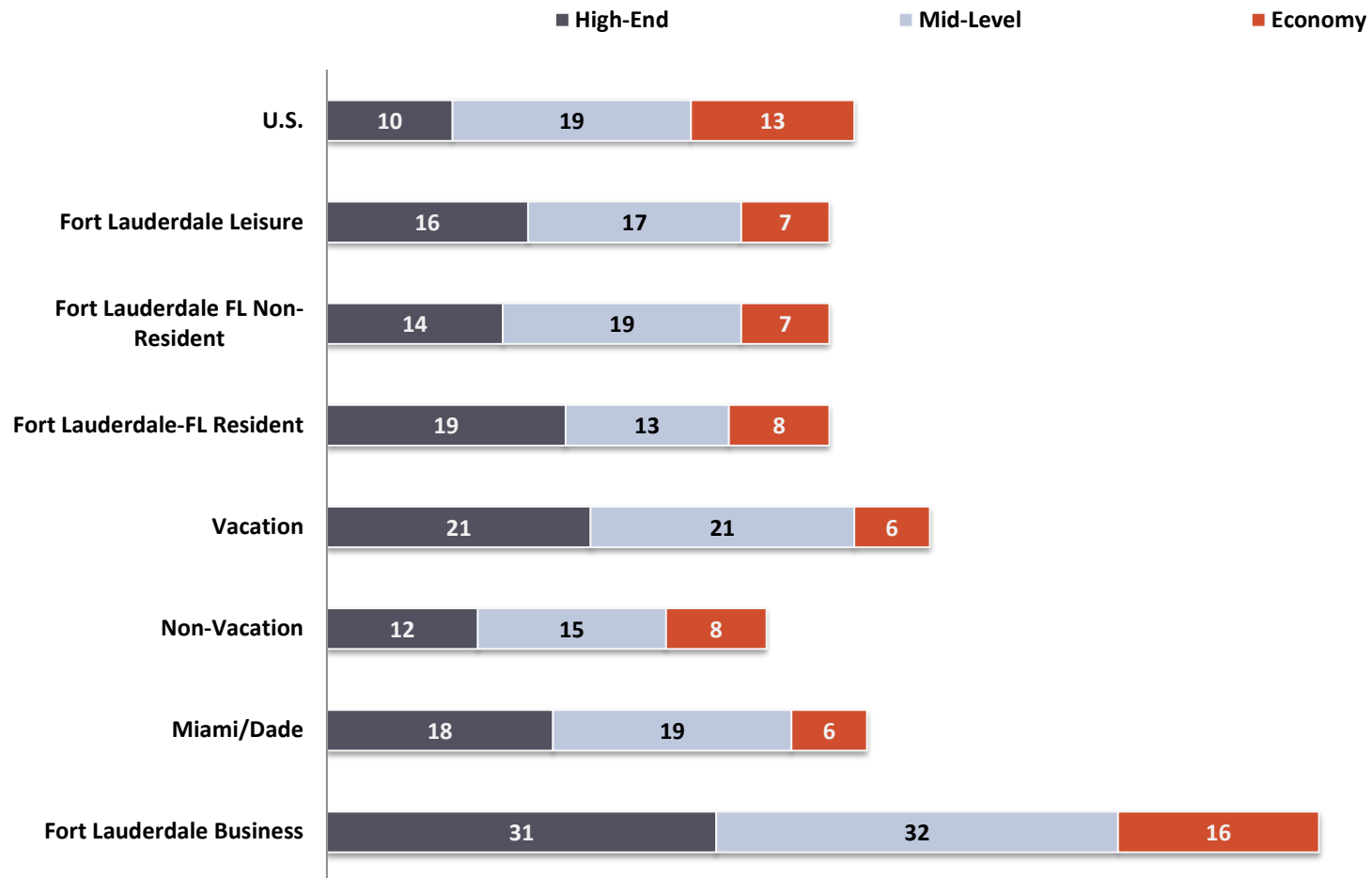


Chart 39 • Segment: 2016-2017 Overnight Leisure Person-Stays (%)

## Fort Lauderdale Avg. Party per Trip Spending by Accommodation Type

ACCOMMODATION

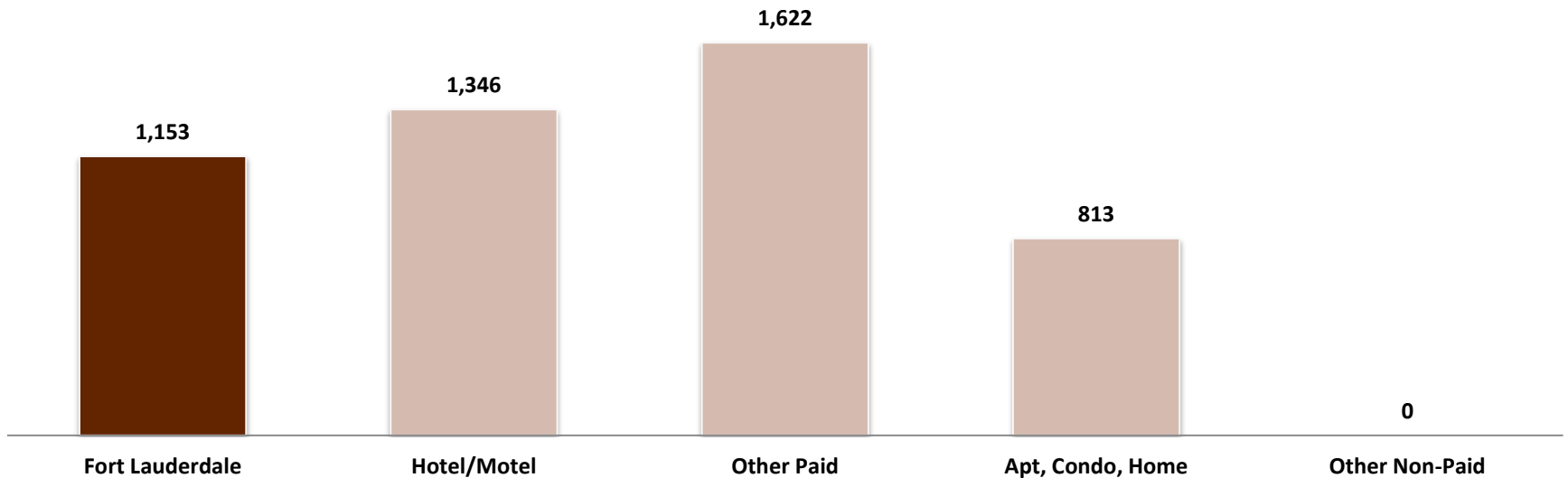


Chart 40 • Segment: 2015-2017rftgyhuyEZW Overnight Leisure Stays (\$)

# Fort Lauderdale Accommodation Type Comparison

ACCOMMODATION

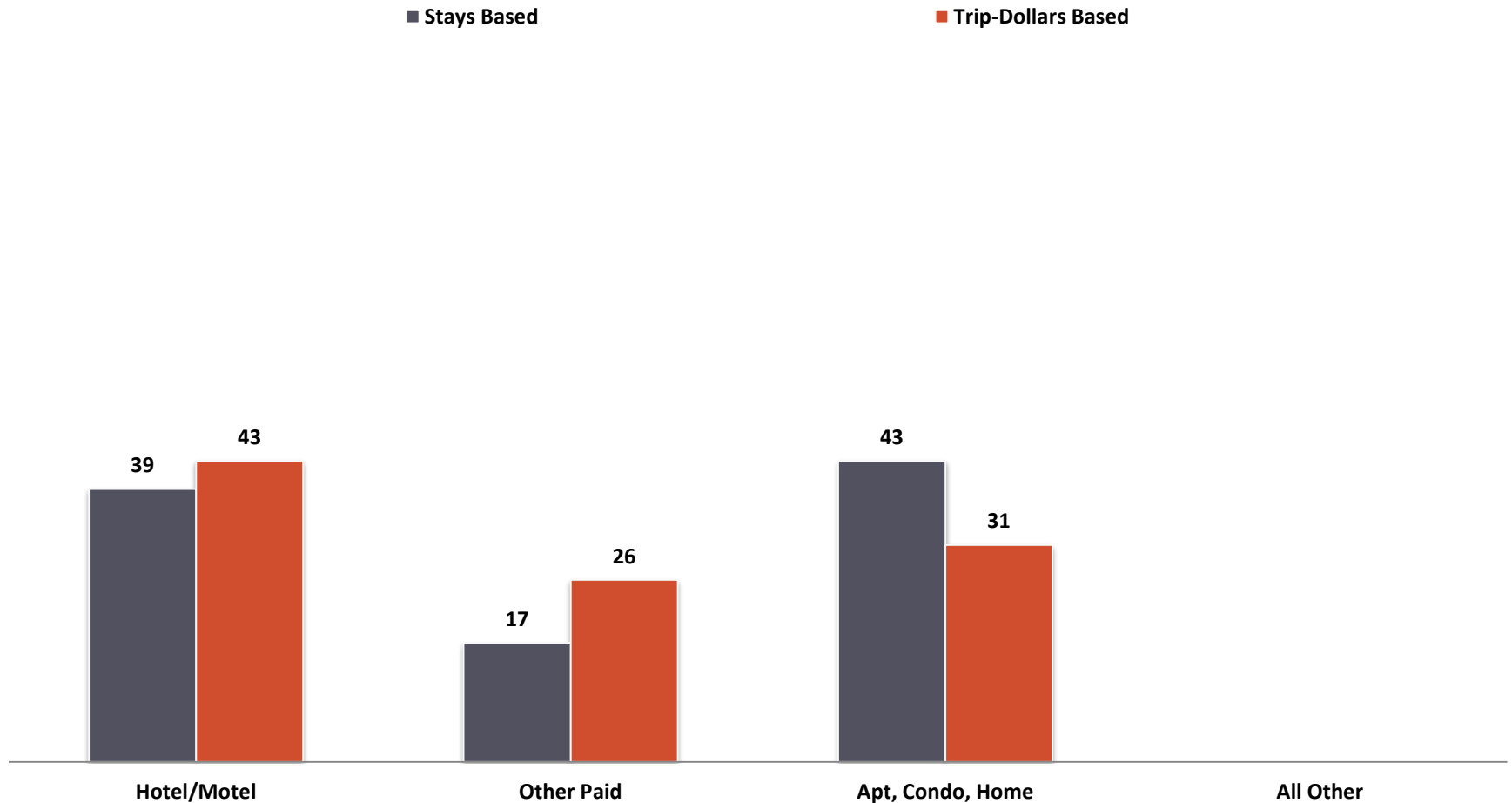


Chart 41 • Segment: 2015-2017 Overnight Leisure (%)

## Appendix

## Research Methodology

DKSA's TRAVEL PERFORMANCE/Monitor<sup>SM</sup> is a comprehensive study measuring the travel behavior of US residents. DKSA contacts 50,000 distinct U.S. households monthly and has done so since 1991. DKSA is able to provide current behavior and long term trended analyses on a wide range of travel.

DKSA data are collected using an online methodology employing KnowledgePanel®, an address based sample panel offered by Knowledge Networks. The sample is drawn as a national probability sample and returns are balanced to ensure representation of the U.S. population according to the most recent U.S. Census. Key factors used for balancing are Origin State, Age, Income, Education, Gender, Ethnicity/race and return rates. The Knowledge Networks sample is used to create benchmark weights which are applied to surveys returned from other managed panels used by DKSA.

Both traveling and non-traveling households are surveyed each month enabling DKSA to generate the best estimate of travel incidence (volume) within the total U.S. population. Among those who have traveled (overnight in the past three months, and daytrips in the past month) details of their trip(s) are recorded for each month. This overlapping, repeating monthly approach boosts the observed number of trips for each travel month and controls for seasonality and telescoping biases.

"Travel" is defined as either an overnight trip defined as going

someplace, staying overnight and then returning home or as a day trip defined as a place away from home and back in the same day. Respondents report travel behavior for each stay of each trip; an approach that enhances reporting for specific travel events, activities and spending.

A wide variety of general travel information is collected including travel to destinations at a city level, hotel stayed in, purpose of stay and activities, expenditures, mode of transportation, party composition, length of stay, travel agent and group tour usage, satisfaction and value ratings, and demographics, including origin markets.

Several questions are asked as open-ends to ensure that the responses are not influenced by a pre-listed set of response categories. Each respondent identifies the actual destination visited with an open-end response. This is particularly significant for obtaining accurate data for smaller cities and counties and representing total travel. This increases time and expense to accurately capture these responses but quality requires it.

Extensive coding lists are updated regularly to ensure that all data is recorded accurately. DKSA's Quality control committee conducts bi-monthly meetings to review survey results and examine methods to maintain and improve quality control.

### About DKSA

D.K. Shifflet & Associates Ltd. is the leading U.S. consumer travel research firm. DKSA is located in McLean, VA and has, for the last 27 years, provided the industry's most complete consumer based travel data on U.S. residents and their travel worldwide. Our clients include destination marketing organizations, theme parks, credit cards, auto clubs, hotel chains and more.