Global Trade Partner Update Thursday, January 11th, 2024

Se LAUDERDALE

Welcome

Tracy, Caitlan, Paul & Hasan

VISIT EVERYONE UNDER THE SUN



Agenda

- Welcome
- Partnerships
- IPW 2026 Update
- New Feature International Market Research
- Global Trade Team Updates
- Airport Update
- Visit Lauderdale Market Update
- Travel Trade Co-Op Campaigns
- Lauderdale Loyalist



Severyone under the sun



PARTNERSHIP

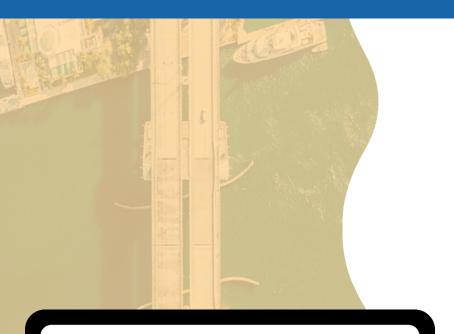
Lisa Barber-Hannaway Partnership Engagement Specialist Lbarberhannaway@broward.org



Partnering with Visit Lauderdale unlocks a dynamic tourism ecosystem, offering visibility, inclusivity, collaboration, continuous engagement, and promotional opportunities. Build unforgettable experiences and propel your business in the heart of Greater Fort Lauderdale's thriving travel scene.









Freshen Up

Elevate your partnership with Visit Lauderdale by keeping your listings and contact info up to date.



Get Social

Connect with us on social media platforms to share your experiences, updates, and engaging content.



Collaborate

Join forces and let's collaborate on projects, events, and initiatives. Become a destination expert by enrolling in our Lauderdale Loyalist program.



Submit & Share

Showcase your upcoming events and accomplishments. Make your contribution an integral part of our

vibrant community.





Promote

Boost your visibility by promoting exclusive offers and unique experiences through our various platforms.



announced

GREATER FORT AUDERDALE 2026

May 18-22





Evenis



OPENING & CLOSING NIGHTS

With great food, drinks, and entertainment that celebrate the county's "Everyone Under the Sun" brand, guests are sure to have an unforgettable experience that reflects the inclusive and diverse spirit of this beautiful destination.

OPENING NIGHT RECEPTION Everyone Under the Stars: A Global **Celebration on** Fort Lauderdale

CLOSING NIGHT RECEPTION

Convention Center Waterfront Pavilion



INTERNATIONAL SPOTLIGHT **COLOMBIA**



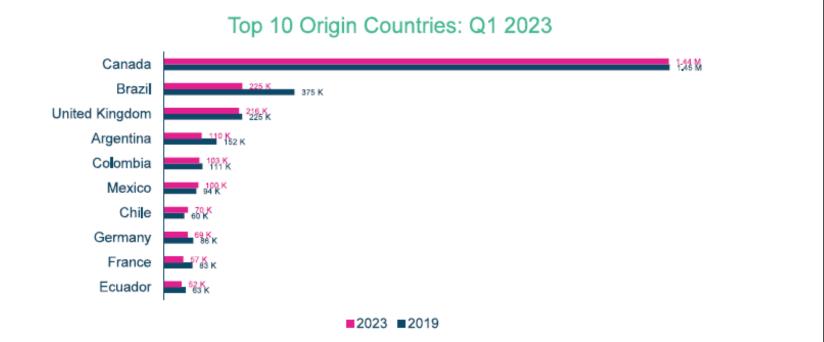
Top 10 Countries: 2022

Rank	Country	Visitors	YoY 2021	YoY 2019	Rank	Country	Visitors	YoY 2021	YoY 2019
1	Canada	2,790,000	+514%	-32%	6	Argentina	354,000	+56%	-37%
2	United Kingdom	1,107,000	+696%	-17%	7	Germany	259,000	+360%	-32%
3	Brazi	709,000	+436%	-46%	8	Chile	240,000	+88%	+16%
4	Colombia	560,000	-21%	+2%	9	Ecuador	196,000	-17%	-20%
5	Mexico	443,000	+14%	-11%	10	Peru	188,000	-28%	+3%



Source: VISIT FLOR DA

OVERSEAS VISITATION & MARKET SHARE

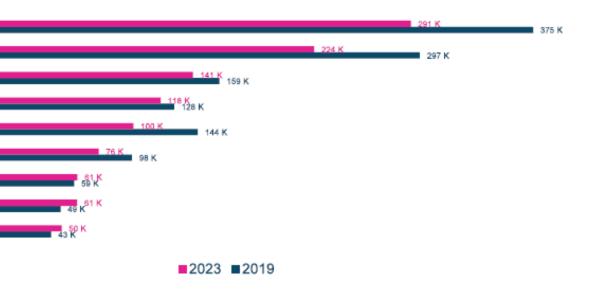


Source: VISIT FLOR DA

OVERSEAS VISITATION & MARKET SHARE

Canada United Kingdom Brazil Colombia Mexico Argentina Germany Ecuador Chile Peru

Top 10 Origin Countries: Q2 2023



Source: VISIT FLOR DA

Trade Updates

Colombia: 2023 operating air capacity – top 10 arrival airports



Source: Sabre, November 2023





VisitTheUSA.com



Market Share CO-FLL (January 2023-October 2023) Airline Marketing Airline Airline Share Code **Spirit Airlines** NK 112.278.47 75% Jetblue **B6** 19% 27.955.35 AV Avianca 5% 7.347.97 **Copa Airlines** CM 1.036.38 1% UA United 2,410 0% **American Airlines** AA 0% 4,373

0%

Delta

DL

Passengers 1,434



Colombian Visitation to FL: Monthly

Source: VISIT FLOR DA

Trade Updates

Colombia: USA inbound travel



Source: NTTO, Tourism Economics, November 2023





Brand USA

1,036 974 934 2024 2025 2026

Travel Updates Colombian traveler profile



Source: ANATO - Travel Agency Association - Colombia Financial Superintendence



40%

1 Month prior the trip

18 PUBLIC HOLIDAYS

in 2024



000

BOOKING BEHAVIOR

Airline website

Travel agencies/ OTA

Trade Updates

Market overview



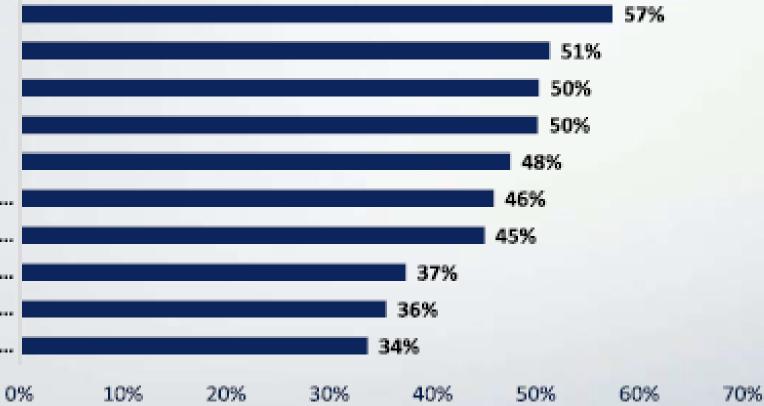


Brand USA

Trade Updates

Colombia : Importance of destination considerations

The price of the overall trip Cultural offerings at the destination Variety of leisure attractions **Quality of beaches** Ease of travel to destination Activities available in the... Natural features/landscapes in... Reputation/popularity as a travel... Opportunity to explore lesser-... Accessibility of services and...



Q: When you choose to visit a destination for an international overnight leisure trip, which of the following are most important? Base: All respondents, N=1,010 Source: Brand USA Market Intelligence Survey, September 2023



Brand USA







			Jan	-Dec. 2022	Jan- Nov . 2023
Agency Name	Destination-City	Industry USD			Industry USD
DESPEGAR COLOMB	FLL-FORT LAUDERDALE		\$	626,120.37	407,953.29
PRICE TRAVEL	FLL-FORT LAUDERDALE		\$	122,209.64	89,397.42
AVIATUR.COM	FLL-FORT LAUDERDALE		\$	80,860.06	44,621.90
PRICETRAVEL	FLL-FORT LAUDERDALE		\$	23,428.95	24,560.98
GLOBAL MERCADO	FLL-FORT LAUDERDALE		\$	33,847.21	21,506.18
AVIATUR	FLL-FORT LAUDERDALE		\$	22,032.04	21,146.58
ATRAPALO COLOMB	FLL-FORT LAUDERDALE		\$	33,718.00	16,695.71
COLAEREO	FLL-FORT LAUDERDALE		\$	26,676.24	16,060.77
VIAJES EXITO	FLL-FORT LAUDERDALE		\$	11,127.50	10,323.53
HOPPER COLOMBIA	FLL-FORT LAUDERDALE		\$	12,092.55	10,164.88
BESTRAVEL SERVI	FLL-FORT LAUDERDALE		\$	17,840.07	10,115.89
STRATEGIC POINT	FLL-FORT LAUDERDALE		\$	10,068.98	9,102.04
FROSCH	FLL-FORT LAUDERDALE		\$	9,722.54	8,944.22
American Expres	FLL-FORT LAUDERDALE		\$	13,731.42	7,512.28
BESTRAVEL SERVI	FLL-FORT LAUDERDALE		\$	10,838.68	7,298.15
			\$		
		1,054,314.25			\$705, 403.8225



BESTRAVEL SERVICE

Tour operador & consolidator included in the TOP 15 best-seller travel agencies in Colombia to the USA in 2020/2021. Strong Disney seller and recently named Seaworld distributor.

Top seller destinations: New York, Florida (Miami and Orlando), Circuits originating in Boston, Los Angeles and Washington

www.bestravel.co

BCD TRAVEL TRAVEL DEPOT

Travel Depot is the wholesale division of BCD Travel. More than 20 years of experience relevant in consolidation target with approx. 200 affiliated agencies and independent travel agents. BCD Travel is one of the most recognized TMC agencies in the Colombian market for its strength at corporate accounts and groups.

www.traveldepot.co

AVIATUR PRINCIPAL BOGOTÁ

Considered the largest travel agency in Colombia, with 63 years of experience in the market, more than 3,000 employees and 116 own offices in 23 cities of the country. It has its own wholesale department where mass distribution packages are created to its affiliated agencies.

Top seller destinations: Miami, Orlando, NY and Las Vegas

www.aviatur.com

VISIT LAUDERDALE EVERYONE UNDER THE SUN LATAM - Recent Activities















LATAM - Upcoming Caitlan Etchevers

- Mercado e Eventos Brazilian Pre-Cruise Media FAM
 - January 21& 22, 2024
- Azul Viagens Brazilan Pre & Post Cruise FAM
 - January 30th / February 4-6, 2024
- ANATO Colombia in February Partner Event
- WTM LATAM & Sales Mission Brazil in April Partner Event
- IPW
- Colombia Sales Mission June Partner Event
 - Bogota, Medellin, and possibly Baranquilla.





CANADA/UK/EU October-December

- Brand USA Travel Week London
- Porter VIP Inaugural Flight FAM
- Hablo Greater Fort Lauderdale Partner Meetings
- Travel Gossip Boot Camp Trainings
- Travel Weekly Agent Training











LIEB Initiatives October-December 2023



- PR Highlights & Trade Highlights
 - Media Event during Visit Florida Roadshow in Hamburg
 - Individual press trip for the Women & Lifestyle magazine Cosmopolitan

Visit Florida Roadshow with TUI in several German Cities

Lobster Loop luxury fair in Greece

Startseite > Reise

Florida: Schnellzug durch den **Sunshine State**

24.11.2023, 10:41 Uhr

C Kommentare

Drucken





Alternative zu Auto oder Inlandsflug: Zwischen Miami und dem Airport von Orlando fahren seit kurzer nhieters Brightline @ Brightline/Visitflorida/dna-tmr

Urlauber haben nun eine neue Möglichkeit, zwischen zwei US-Metropoler auf Gleisen zu reisen. Und wesentlich schneller als bisher.

Miami - Zwischen Miami und dem Flughafen Orlando in Florida gibt es eine neue Bahnlinie. Das Unternehmen Brightline verbindet die Städte mit Intercity-Zügen. Darauf weist das Tourismusbüro Visit Florida h



Upcoming Canda / UK/Europe Paul Mason

- Travel and Adventure Show Chicago
- IITA, February 11th -14th in Memphis (Tracy) МЕМРНІЗ ТЕNNESSEE
- UK Mission, February 19-23rd in London and Manchester
- Scandinavia Mission & 3 Trade Shows, Feldarch in Denmark/Sweden
- Canadian Outdoor Adventure Shows & Mission end of March Partner Event (Spots Available)
- Virtuoso On Tour Canada, April in Montreal
- IPW LA, Partner Event (Spots Available)



ΙΙΤΑ











LIEB Initiatives January-March 2024

- PR Highlights & Trade Outlook
 - IMM Germany, Berlin in March
 - VUSA Media Breakfast during ITB, Berlin in March
 - CANUSA campaign (Largest Tour Operator for NA)
 - Air Canada & Florida Keys
 - 20.000 of CANUSA's top tier customers, approx. 2 million ad impressions on urlaubstracker.de, 73.000+ fans on Facebook, 11.700+ followers on Instagram, approx. 200.000 ad

impressions on Pinterest, 40.000 readers carefully targeted for the

Hablo

3,076 Followers, 1,700 added in 2023

15,500 Post Impressions in 2023

HABLO TALKS INTERVIEW

5,368 Impressions

&1,591 completed video views

HABLO DAILY QUIZ10 Days 4471 impressions 997 Agent Quiz Entries



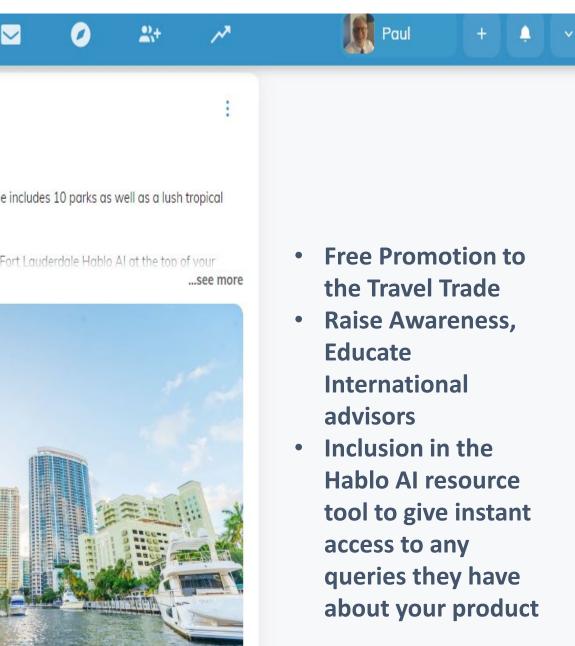
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CENTRIC



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Visit Lauderdale • 111 · () 5d · ()
Looking to stroll with a view?
Riverwalk in downtown Fort Lauderdale inc waterfront. 🕋 To find out more information, open our Fort
📫 11 Likes 🗐 Co





Comment

A Share

Snowbirdadvisor.ca

Audience and Reach

- 130K+ Snowbirds reached
- 75K members, e-mail subscribers
- 45% e-mail open rate
- 40K+ monthly website visitation
- 50+ Age Group
- 200K avg. spend per couple (Lifetime) in Winter destination.

Live on December 12th, 1-year campaign.

- Destination Guide & Side bar banners, Event Calendar
- Facebook Promotion & Annual Destination Guide e-mail
- Local Community, Things to do, Hotels , How to get here
- Culture, Activities, Water Sports, Team Sports, shopping just to name a few
- Links within the guide will go directly to your site on Visitlauderdlae.com

Results From 12/12-12/31

- Destination Guide Page Views: 1582
- Destination Guide Page Views: 452
- Average Time Spent On Destination Guide Page: 3.5 min.

Greater Fort Lauderdale – An ideal destination for Canadian snowbirds!





 Unforgettable Performances Await at Broward Center Experience world-class performances and cultural events at the Broward Center for the iconic venue in Fort Lauderdale is your gateway to an extraordinary world of arts and entertainment.





33% Number of Canadians age 55+ in 2025



En Fr Q Search





Where: Fort Lauderdale When: January 8, 2024 - January 14, 2024

Visit Lauderdale Food & Wine



Indulge in some of Greater Fort Lauderdale's best bites and sips during the fifth annual Visit Lauderdale Food & Wine Festival.

This week-long celebration showcases renowned and emerging chefs, restaurateurs, mixologists, and local hotspots, with a portion of all proceeds benefiting Joe DiMaggio Children's Hospital. The Grand Tasting, scheduled for January 13th, offers

unlimited food and beverage tastings, cooking demonstrations, and live music on the beach.

Click here for more event information

Performing Arts. With a lineup of Broadway shows, ballets, symphony concerts, and more, this



roward Centre For The P Arts





Domestic





October -

December

2023













Upcoming Domestic Roger Dudley

- Travel & Adventure Shows 3-Partner Events
 - Chicago SOLD OUT
 - Washington DC-Feb 24-25-2 spots
 - Atlanta March 9-10 1 Spot
- California Sales Mission–Partner Event
- Cruise Planners Las Vegas Boot Camp
- Cruise 360 Partner Event-1 spot left
- ASTA Annual Convention–Partner Event
 - Dallas May 29-31 1 spot
- Signature Travel Network Chicago Regional
- **GTM**–Partner FAM opportunities (July)







Presented to:

Global Trade Development Quarterly Partners Meeting



Presented by: **Steve Belleme Business Development Manager Broward County Aviation Department** January 11, 2024



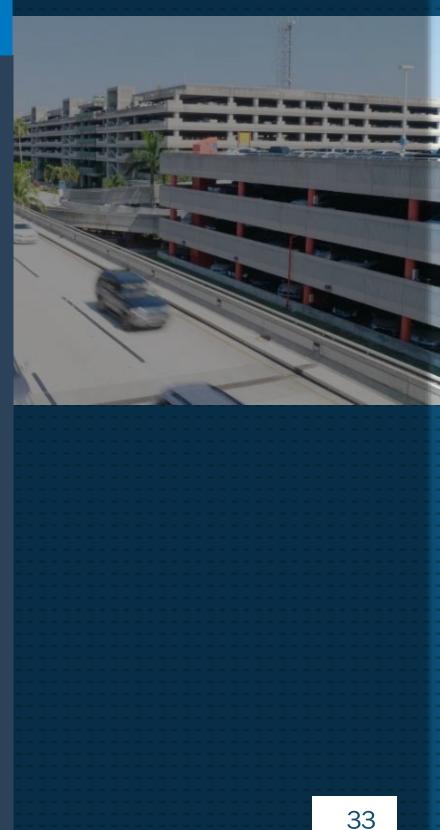
Agenda



- Elevating the Guest Experience
- Master Plan Update
- Q&A



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"By the Numbers"



- In 2022, total passenger traffic at FLL was 31.7M, up 12.9% vs 2021, down -13.8% vs 2019
- According to Airports Council International (CY 2022), FLL ranked:
 - 17th in total passenger traffic
 - 20th in domestic passenger traffic
 - 11th in international passenger traffic. FLL carried more international passengers than 0 LaGuardia, Salt Lake City, Tampa, Chicago Midway, San Antonio, Baltimore, and Portland...Combined!
- FLL carries more international passengers than several major US airports including Boston, Seattle, Denver, Philadelphia, Detroit, Las Vegas, and Orlando
- CYTD November 2023 total passenger traffic was 31.2M, up 10.9% vs 2022 and \bullet down -4.3% vs 2019
- Total passenger traffic is projected to exceed 35M passengers for CY 2023

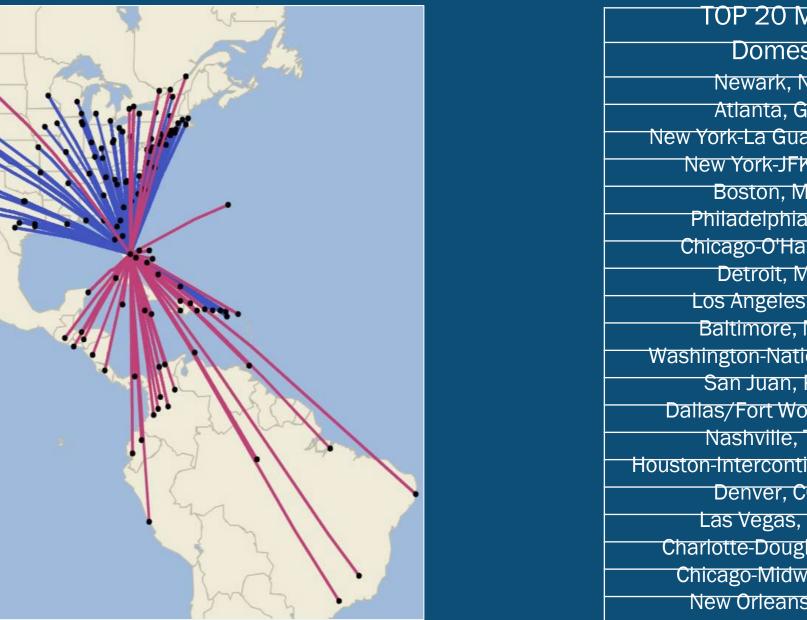


"By the Numbers"





	Don	nestic	International		
	Deps	Dest	Deps	Dest	
2024	282	88	89	49	
2023	255	83	83	49	
2019	290	81	107	61	



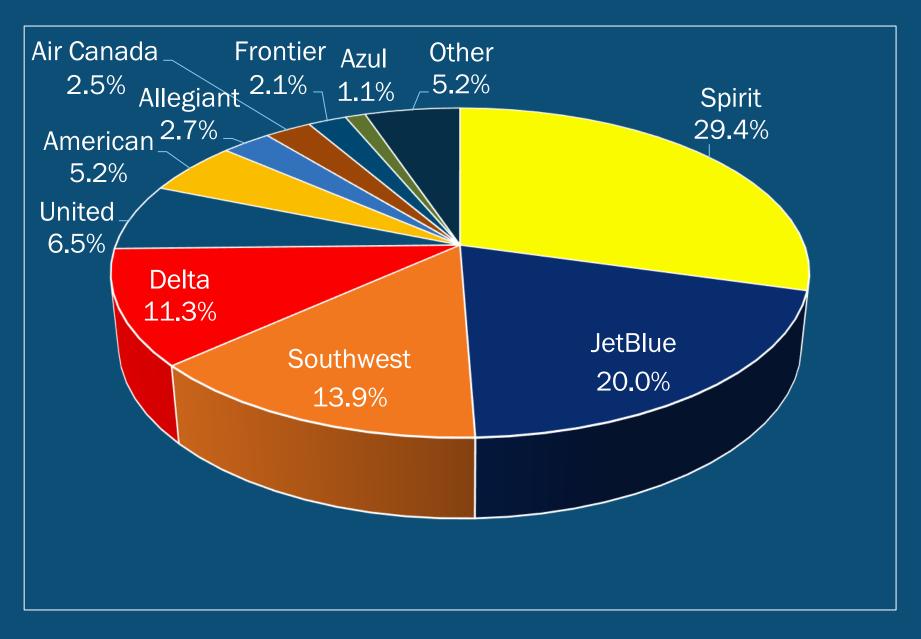
Data source: Cirium/DIIO Schedule and Origin/Destination Data

MARKETS YE Jun 2023				
estic	International			
, NJ, US	Nassau, BS			
, GA, US	Toronto, ON, CA			
uardia, NY, US	Cancun, MX			
FK, NY, US	Havana, CU			
MA, US	Punta Cana, DO			
nia, PA, US	Montego Bay, JM			
Hare, IL, US	Kingston, JM			
, MI, US	Santo Domingo, DO			
es, CA, US	Montreal-PET, QC, CA			
e, MD, US	San Jose, CR			
ational, DC, US	Bogota, CO			
ו, PR, US	Lima, PE			
Vorth, TX, US	Medellin, CO			
e, TN, US	Sao Paulo-Viraco, SP, BR			
ntinental, TX, US	Guayaquil, EC			
CO, US	Port Au Prince, HT			
s, NV, US	Comayagua, HN			
uglas, NC, US	Cartagena, CO			
dway, IL, US	Barranquilla, CO			
ns, LA, US	Santiago, DO			





FLL's Airline Market Share YTD January – November 2023



Data source: BCAD Finance Reports



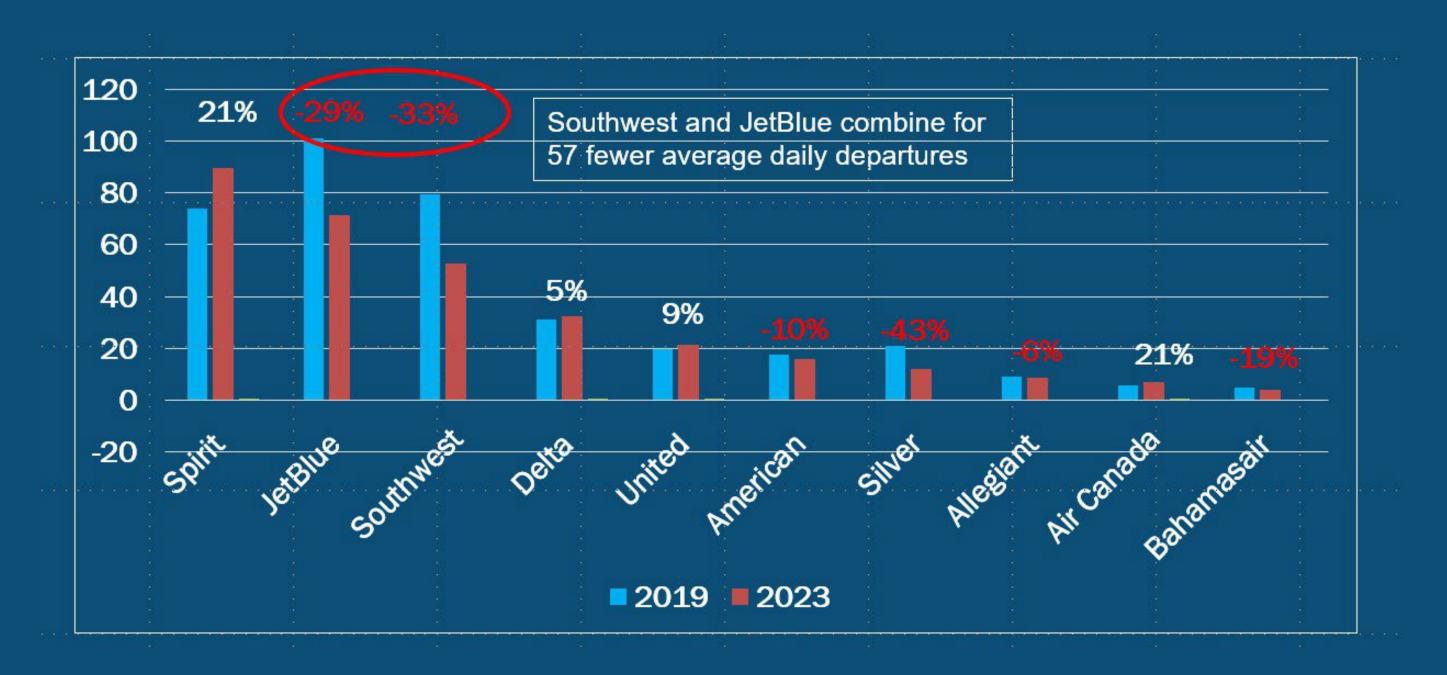
FLL's Airline % Change YTD January – November 2023

Spirit	23.6%
JetBlue	-20.1%
Southwest	-32.3%
Delta	6.8%
United	6.1%
American	-4.8%
Allegiant	-3.6%
Air Canada	3.9%
Frontier	179.5%
Azul	40.9%

"By the Numbers"



FLL's Airline Growth Comparison Average Scheduled Daily Departures CY 2023 vs 2019



Data source: Cirium/DIIO Scheduled Data Report



"By the Numbers"



Total Available <u>Scheduled Seat</u> Comparison CY 2023 vs. CY 2019

Flights Were Down, but Seats Reached 2019 Levels by the End of the Year (On average aircraft had 14 more seats per departure)



Data source: Cirium/DIIO Scheduled Data Report







Scheduled Departure Comparison CY 2024 vs. CY 2023



Data source: Cirium/DIIO Scheduled Data Report



40

"By the Numbers"



New Service in 2023/2024

- Avelo began service to Raleigh Durham and Niagara Falls in February \bullet
- Azul resumed service to Recife in February, Belo Horizonte in June \bullet
- Spirit launched new service to Norfolk and San Antonio in March \bullet
- Allegiant launched new service to Nashville and Cedar Rapids in November \bullet
- American returned to Washington National in November \bullet
- Bahamasair launched service to George Town, Bahamas in November
- Silver began service to Providenciales in December \bullet
- JetBlue launched the much-anticipated service to Tallahassee on January 4th



"By the Numbers"





- BermudAir new service to Bermuda ightarrowstarted September 22, 2023
- 6 weekly departures •

New Airlines



Porter Airlines new daily service to Toronto • and Ottawa started November 30, 2023





- El Al started seasonal service to Tel Aviv ulletin September.
- Year-round service to commence April 2024 ulletwith two flights per week



Elevating the Guest Experience







Elevating the Guest Experience: BR WARD

Recent Opening

D

Bonefish Grill Terminal 3





Escape Lounge Terminal 3

Elevating the Guest Experience

Terminal Expansion/Modernization

• Terminal 5

- Presently in the design phase
- Anticipate completion: mid-2026
- $_{\circ}$ Estimated cost: \$404M













Elevating the Guest Experience

Terminal Expansion/Modernization

- Post-Security Terminal Connectors T1-T2-T3
 - $_{\odot}\,$ Project is in the bidding phase & being evaluated
 - Anticipated completion: 2027
 - Estimated cost: \$260M













Intermodal Center (IMC)

- Project Definition Document (PDD) is being prepared with airport stakeholders
- Project in environmental review phase (12 months)
- Anticipated completion: 2029
- Estimated cost: \$835M







Automated People Mover (APM)

- PDD was completed in December 2022
- Project in environmental review phase (12 months)
- Anticipated completion: 2030
- Estimated cost: \$855M







Commercial Center, New Palm Parking Garage

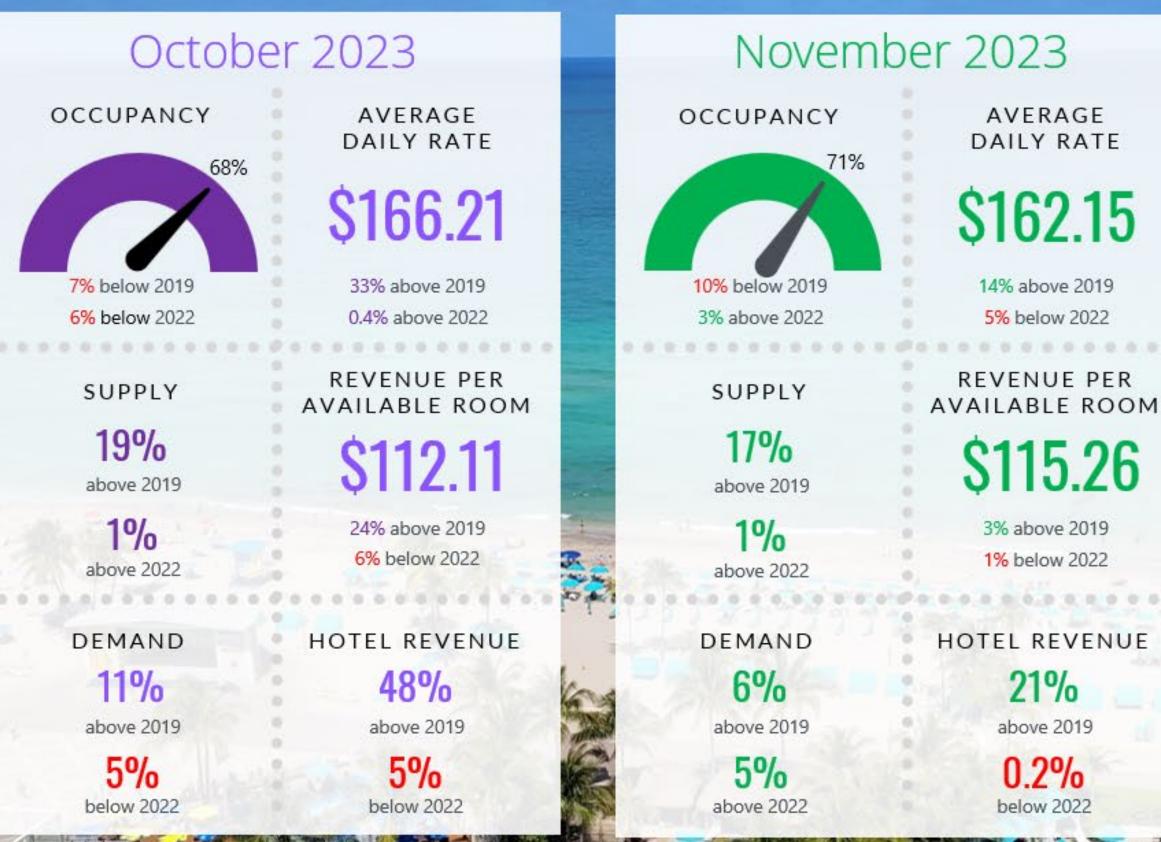
- Commercial Center featuring new concessions, enter areas, and other amenities
- New Palm Garage with 3,500 parking spaces
- Anticipated completion: 2032







Hotel Metrics



Source: STR Global



December 2023

OCCUPANCY



SUPPLY

17%

above 2019

1%

above 2022

DEMAND

11%

above 2019

6%

above 2022

AVERAGE DAILY RATE



23% above 2019 1% above 2022

REVENUE PER AVAILABLE ROOM

\$143.36

17% above 2019 6% above 2022

HOTEL REVENUE

37% above 2019

7% above 2022

Hotel Metrics

2023 Year-to-Date January 1 – December 31

OCCUPANCY

72%

6% below 2019 0.3% above 2022

AVERAGE DAILY RATE

\$186.32

27% above 2019

4% above 2022

DEMAND

12% above 2019

1% above 2022

REVENUE PER AVAILABLE ROOM \$133.92

> 20% above 2019 4% above 2022



HOTEL REVENUE

42% above 2019

4% above 2022

NEW SUPPLY

19% above 2019

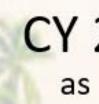
0.3% above 2022

*3 hotels (297 rooms) in pipeline for 2024

Hotel Performance vs Forecast



CY 2023	Forecast	Actual	%Difference
Occ	75.0%	71.9%	-4%
ADR	\$ 190.20	\$ 186.32	-2%
RevPAR	\$ 144.55	\$ 133.92	-7%



Occ

75.0%

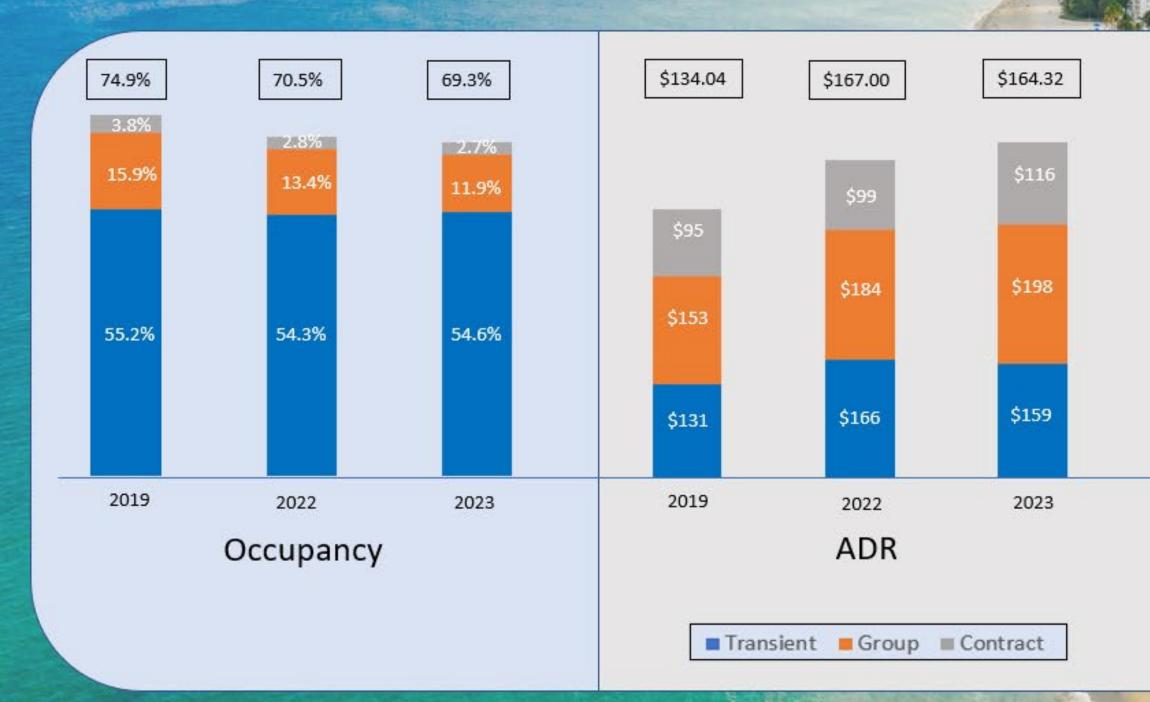


CY 2023 Forecast as released Nov 2022

ADR	RevPAR	
\$ 190.20	\$ 144.55	

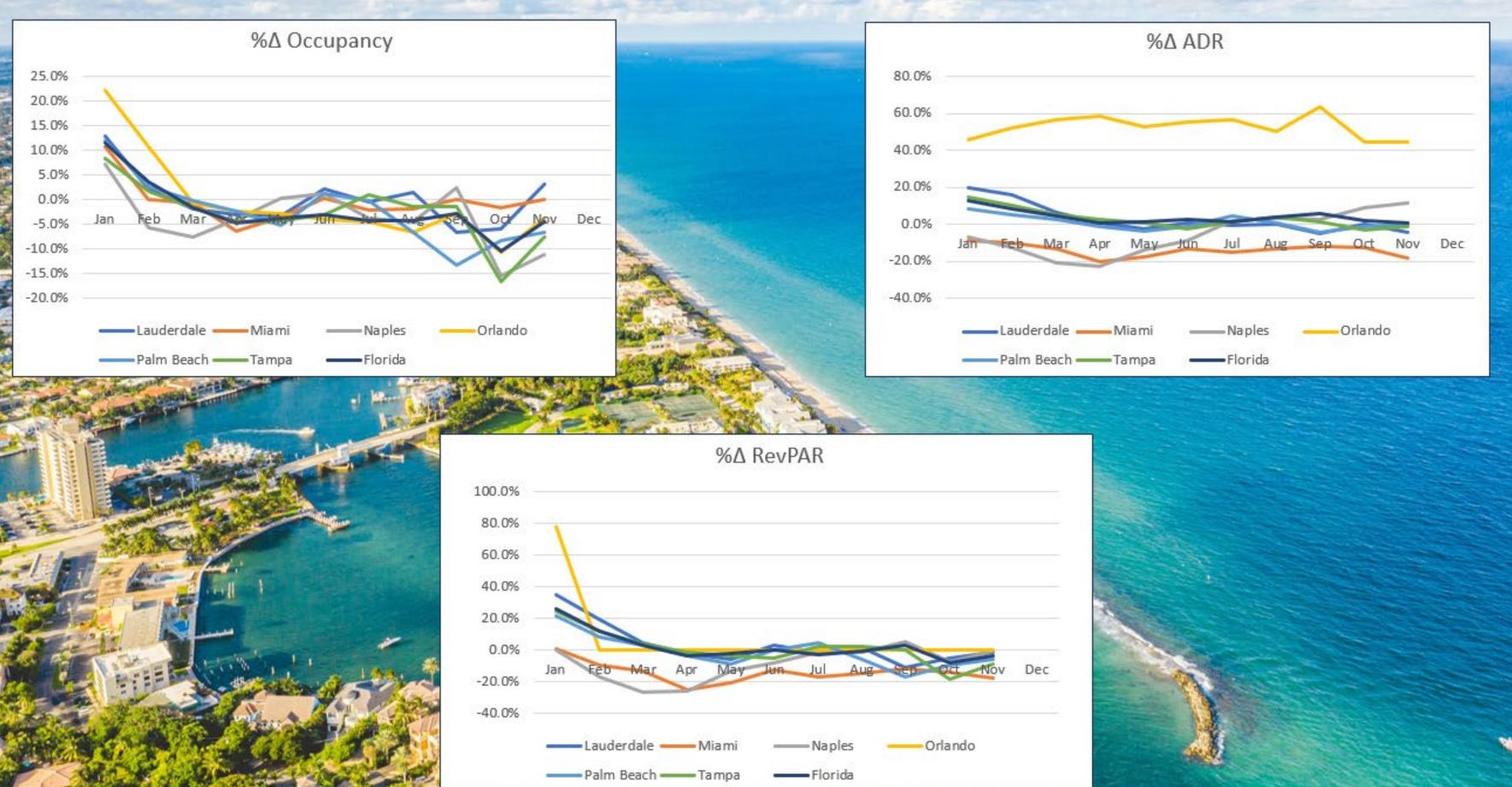


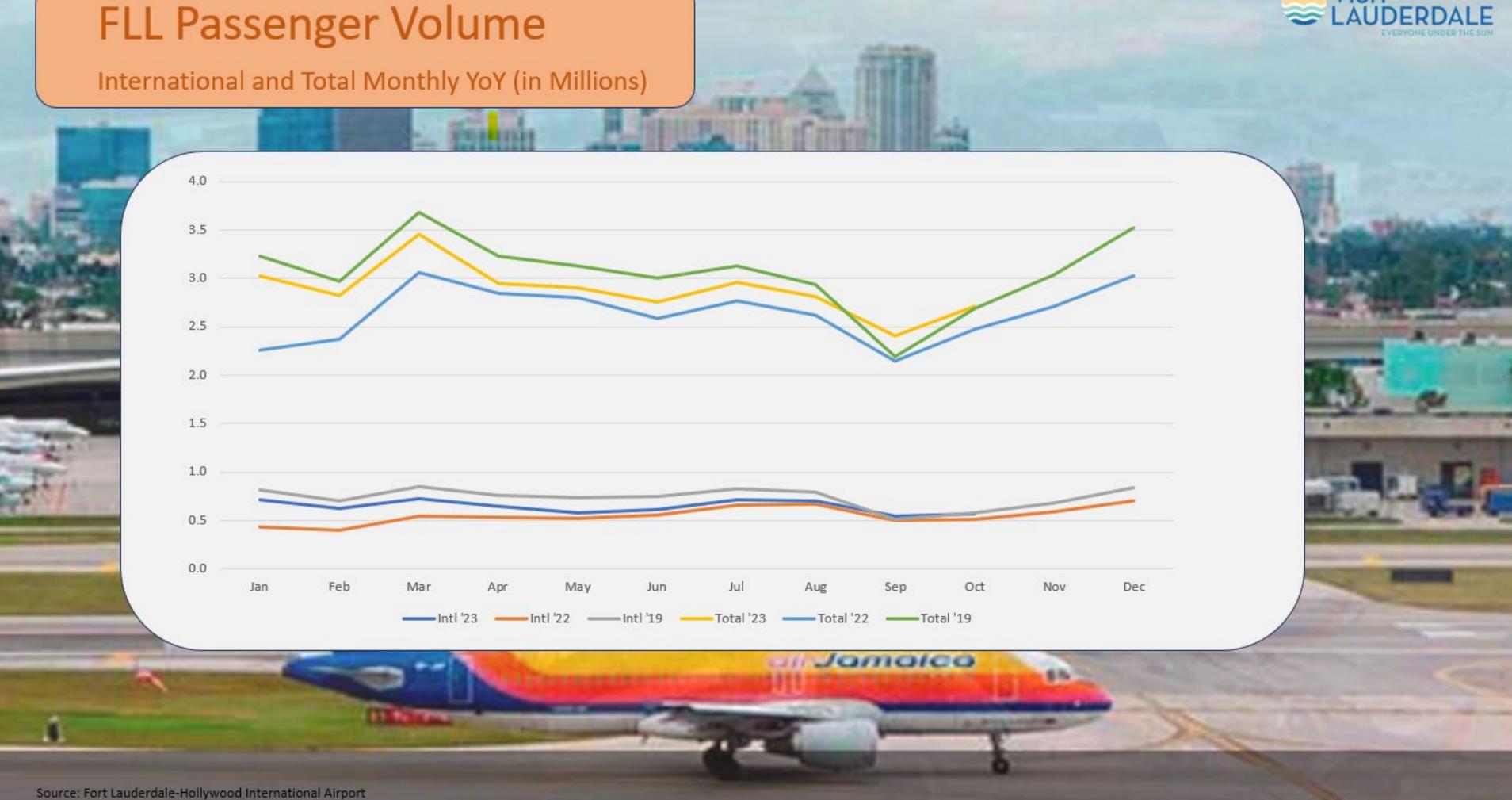
Comparison of Segmentation Mix 2019 vs. 2022 vs. 2023 (Oct-Nov)





Performance to Competitive Set Year-over-Year State NAU STREET ALLE



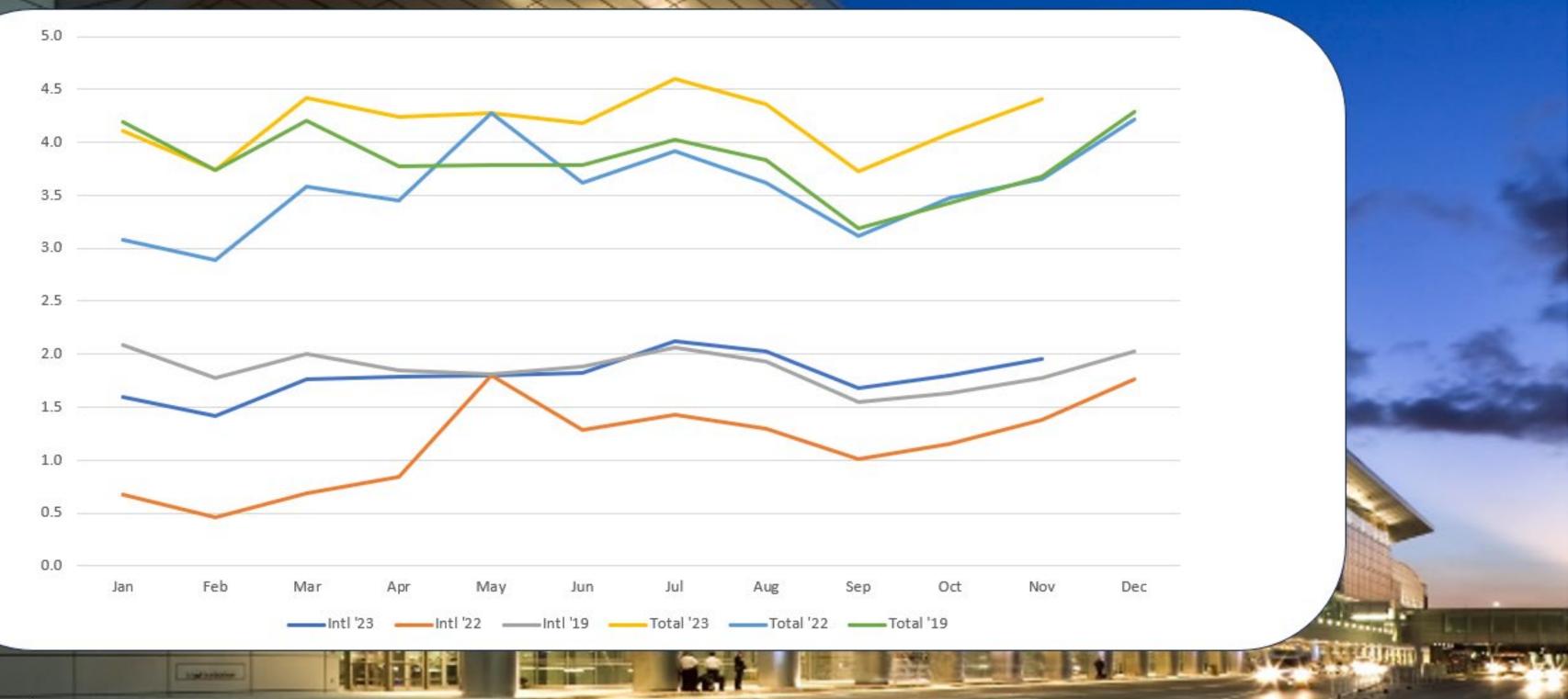




Nov	Dec
	Nov

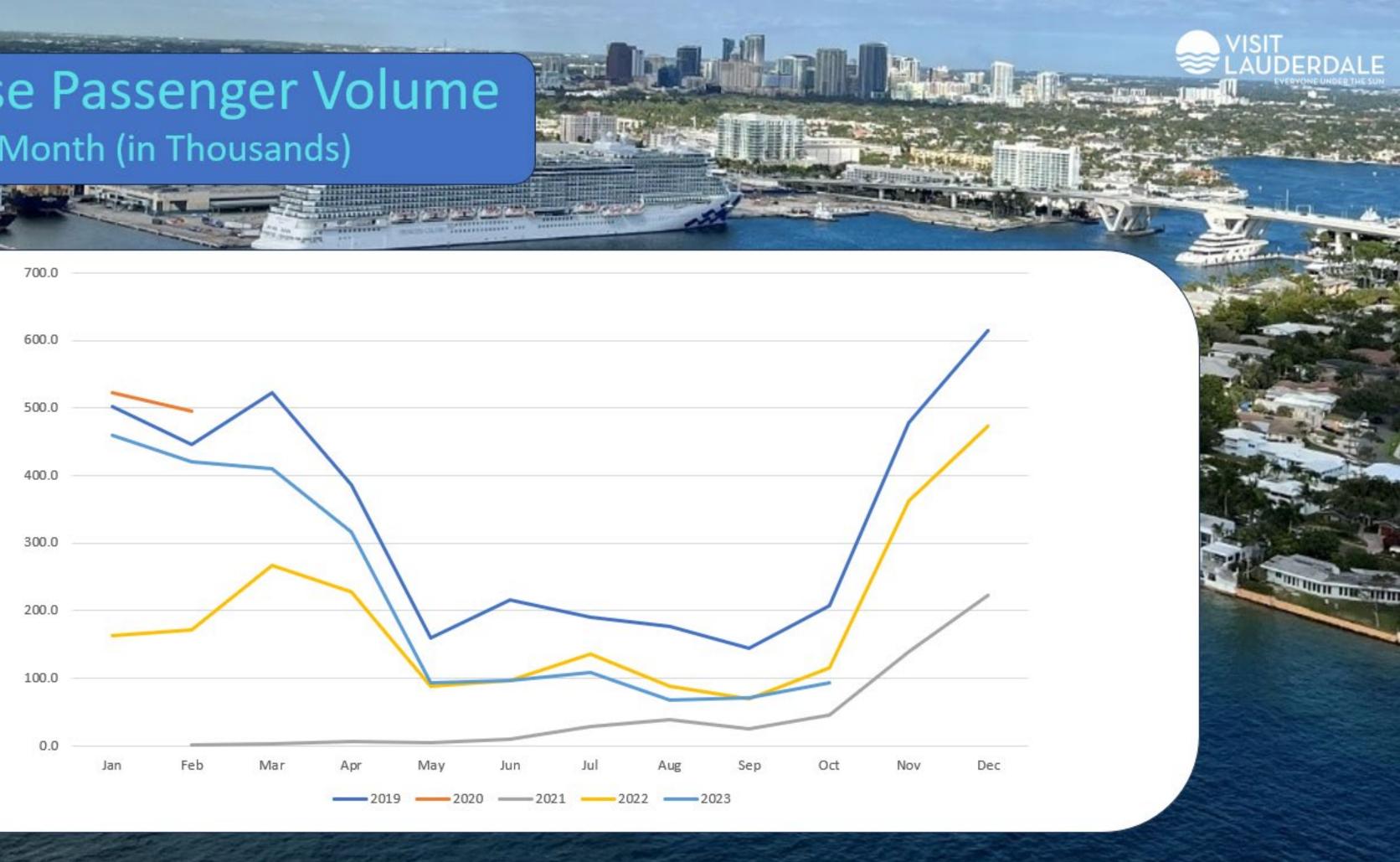
MIA Passenger Volume

International and Total Monthly YoY (in Millions)





Cruise Passenger Volume YoY by Month (in Thousands)

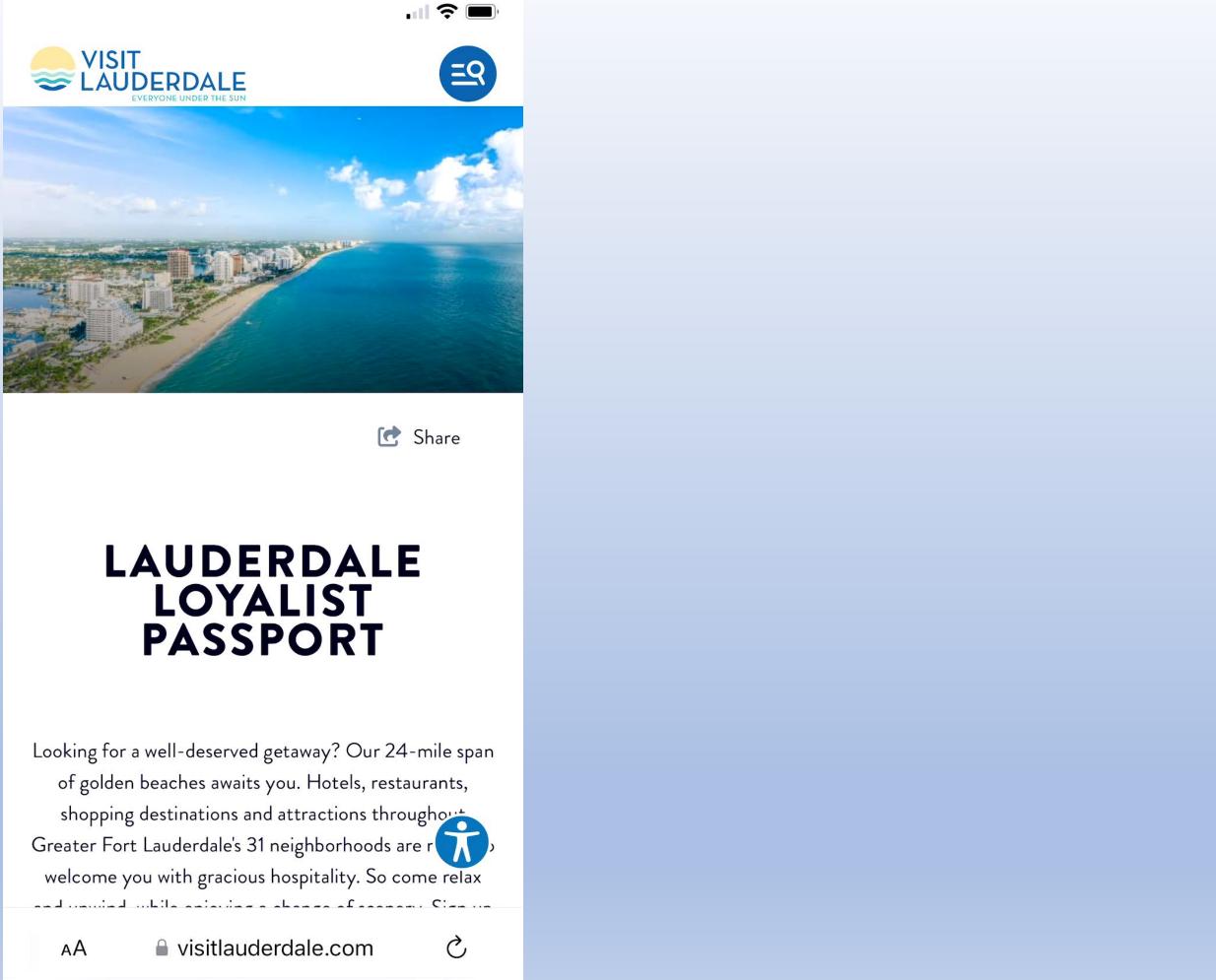


In Conclusion:





LAUDERDALE LOYALIST PASSPORT



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Top Countries

- Canada 193
- Brazil-26
- Germany-23
- Peru-19









Trade Marketing Initiatives & Co-Op's





Co-op Trade and Consumer Marketing Campaigns

B2B, B2C, B2B2C

•Hotelbeds/Bedsonline

•TravelBrands – Canada with Brand USA

•JetSet Holidays – with Air Canada

•CANUSA-with Air Canada

COMING UP...

•Porter Airlines

•Travel Week - Canada

•Baxter Media - Canada

•VAX Vacation Access

•Ladevi LATAM

•Travel Industry Today - Canada





bedschine

Hotel Beds / BedsOnline

- 2024 Campaign to begin on 2/1/2024
- 1st Phase Feb-April, Canada, USA, UK, Germany and Spain
- 2nd Phase May-July, Canada, USA, Brazil, Mexico, Colombia
- Expecting 10% Domestic Lift and 15% International Lift with this Campaign
- Total 2023 numbers in region:
 - 71,212 RN / 30,362 RN Campaign •
 - \$13.5 Million HR/ \$5.8 Million HR Campaign •
 - \$189 ADR/ \$191.34 ADR Campaign •

hotelbeds

Hotel Beds / BedsOnline (February-July 2023)

COUNTRY	20 19	2022	2023	vs 20 19	vs 2022
CANADA	\$410,193	\$453,839	\$672,446	64%	48%
USA	\$2,977,367	\$4,772,077	\$3,889,391	3 1%	-18%
UNITED KINGDOM	\$563,068	\$461,432	\$598,987	6%	30%
GERMANY	\$72,484	\$59,040	\$58,182	-20%	-1%
SWEDEN	\$37,876	\$26,629	\$54,721	44%	10 5%
DENMARK	\$51,309	\$21,148	\$40,575	-21%	92%
NORWAY	\$23,577	\$15,104	\$35,048	49%	132%







OQY

redtag.ca

EXCLUSIVE SAVINGS ALERT for the Sunshine State's jewel - Greater Fort Lauderdale!

For a limited-time only, book your winter getaway to Greater Fort Lauderdale and enjoy \$100 off* with promo code FLL100. From pristine beaches to lively waterfronts, this destination offers the perfect blend of relaxation and excitement.

Your sun-drenched escape awaits - pack your bags and save today!

#redtag #redtagfam #travelmadeeasy #FortLauderdale #VisitTheUSA





Searching for a Sunny escape? The 24-mile stretch of golden beaches in Greater Fort Lauderdale is waiting for you. In all 31 of these neighborhoods, there are hotels, eateries, shopping centers, and attractions waiting to greet you with warm hospitality. Come on over and relax, enjoy a change of scenery.

FORT LAUDERDALE

La Costa Beach Club ***

FORT LAUDERDALE Sonesta Fort Lauderdale Beach ****

Dekuse room King, Ocean View











FEATURED HOTEL



verything you need is always close at hand at B Ocean Resort. Take in all of their B Signature Elements and unique elements that are only found in the real self-expression experience. Enjoy everything that makes this hotel in Fort Lauderdale Beach special, from a private beach and two resort swimming pools and a selection of dining options. You'll feel like a VIP from check-in to check-out.

FORT LAUDERDALE B Ocean Resort Fort Lauderdale Beach **** Chic City View King - No Meals



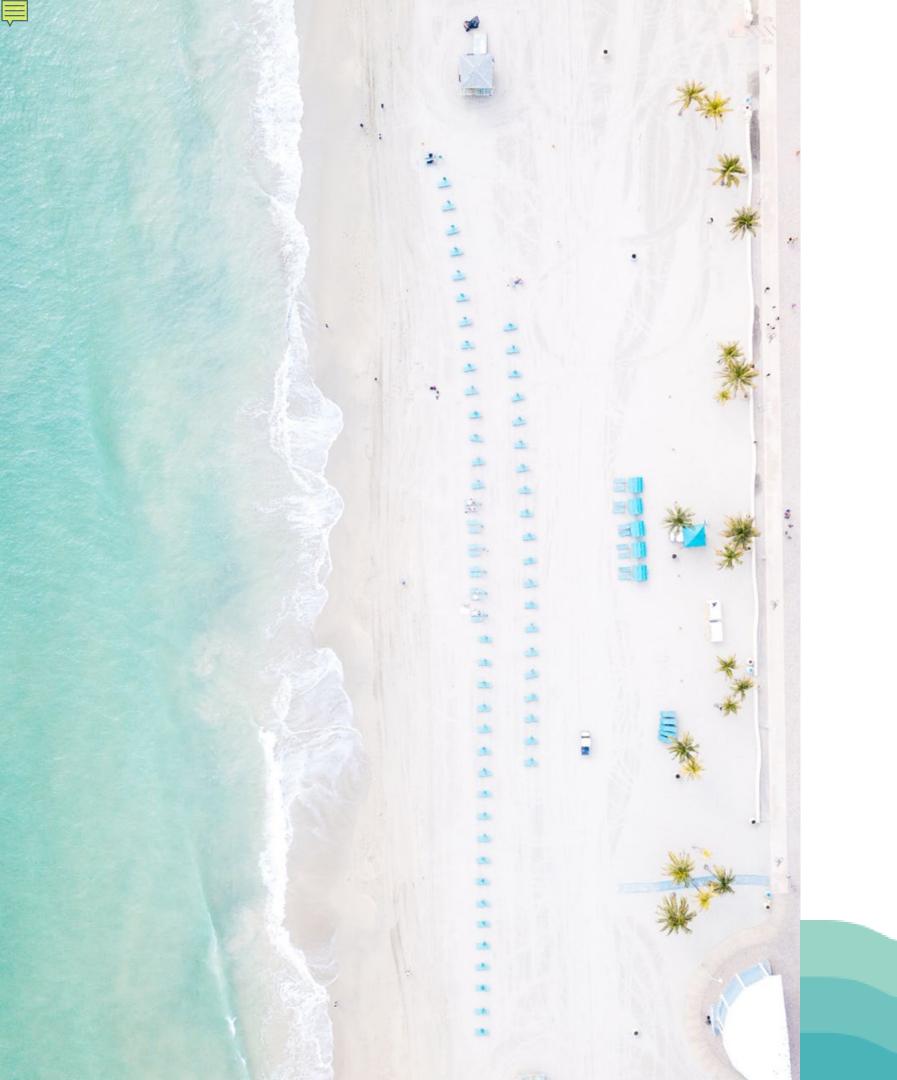
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Access Bookings: TravelBrandsAccess.com OR CALL: 1-844-5-TBRAND (827263)

Noca Fed Label Vacabase Inc - 40.a. Transformet, B.C. Reg. #1007; Ont. Feg. # 20022211; Quartee parent Initia #17012PA, with offices at 1841 Dandes Daved West, 4th Feor, Tecreto, DH Mell West - 1000 West Parents Daved, Dor 25, Vancasee, DE WA.307 - 105-1057 (Seg atte

Prices include the contribution of customers to the Compensation Fund for clients of Quebec travel agents. (Screwell)











QUARTERLY PARTNER MEETING



SAVE THE DATE

Thursday, April 11, 2024 9:30 a.m. Virtual



thank you!

