

Overseas Visitors to Fort Lauderdale

2018 Overview

Produced for **GREATER
FORT LAUDERDALE**



Travel Market Insights Inc.

- Consumer Data
- Passenger Data
- In-Country Trade Data
- Economic Indicators
- National Data
- Proprietary Data
- Verifiable Data Analysis

New: [XBorder_Canada](#) Program -
Replaces the Statistics Canada
state visitor data and added
city/region visitor metrics.



Travel Market Insights

*Leading in international
travel research with
actionable analysis.*

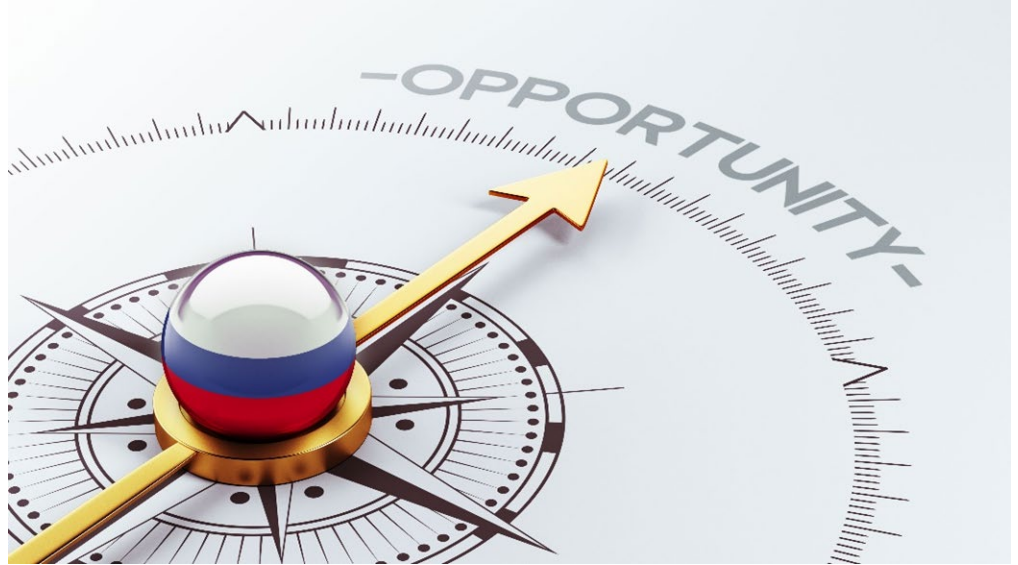
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International
Visitor
Opportunity

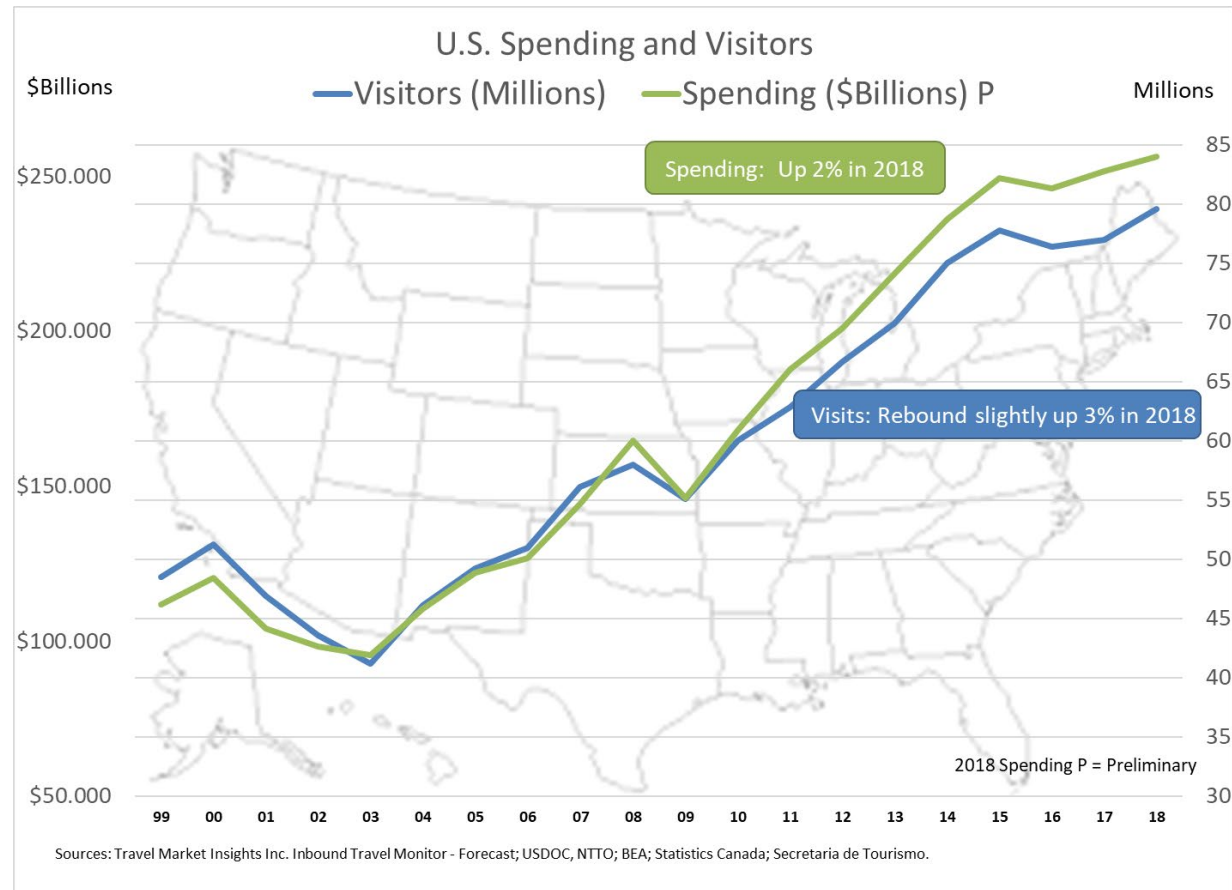
In A Changing
Environment

United States Overview



2018 International Travel to the U.S.

- ✓ 79.6 Million Visitors
- ✓ \$255.5 Billion Spend
- ✓ Visitor arrivals increased 3.5% in 2018 over 2017
- ✓ Spending increased 1.7% in 2018 over 2017

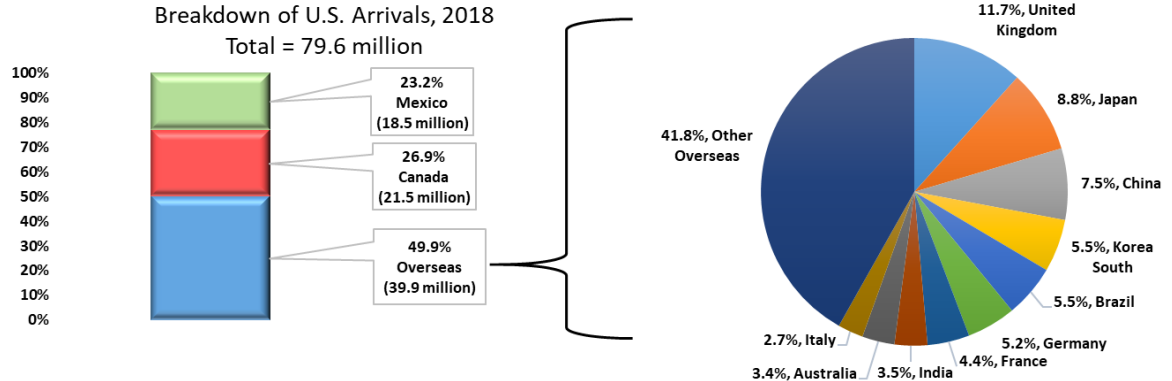


Sources: TMII, USDOC, NTTO, BEA

U.S. International Visitors 2018

- ✓ 79.6 million international visitors traveled to the U.S. in 2018.
- ✓ A near majority (49.9%) of visitors resided in overseas countries.
- ✓ Canada's share increased to 26.9% of U.S. visitors.
- ✓ Mexico accounted for 23.2% of U.S. visitors in 2018.
- ✓ Emerging markets led growth in 2018, with Brazil recovering strong after previous declines.
- ✓ Top 5 Overseas:
 - ✓ UK
 - ✓ Japan
 - ✓ China
 - ✓ South Korea
 - ✓ Brazil

International Visitor Arrivals to the United States



Sources: TMII, USDOC, NTTD, Statistics Canada, Banco de Mexico

International Visitor Opportunity

- 12 countries with over 1 million visitors traveling to the USA!
- Global air traffic and capacity have soared – with more air routes from more international cities to more U.S. cities than in any time in history.
- Airfare has been pushing the “low cost” boundaries for years – with low fuel costs.
- Part of the global growth is tied to immigration – the foreign-born population in the U.S. has reached its highest share since 1910! 13.7% of the U.S. population (44.5 million people). Source: U.S. Census
- Global middle class continues to expand, although at a slower rate of growth.

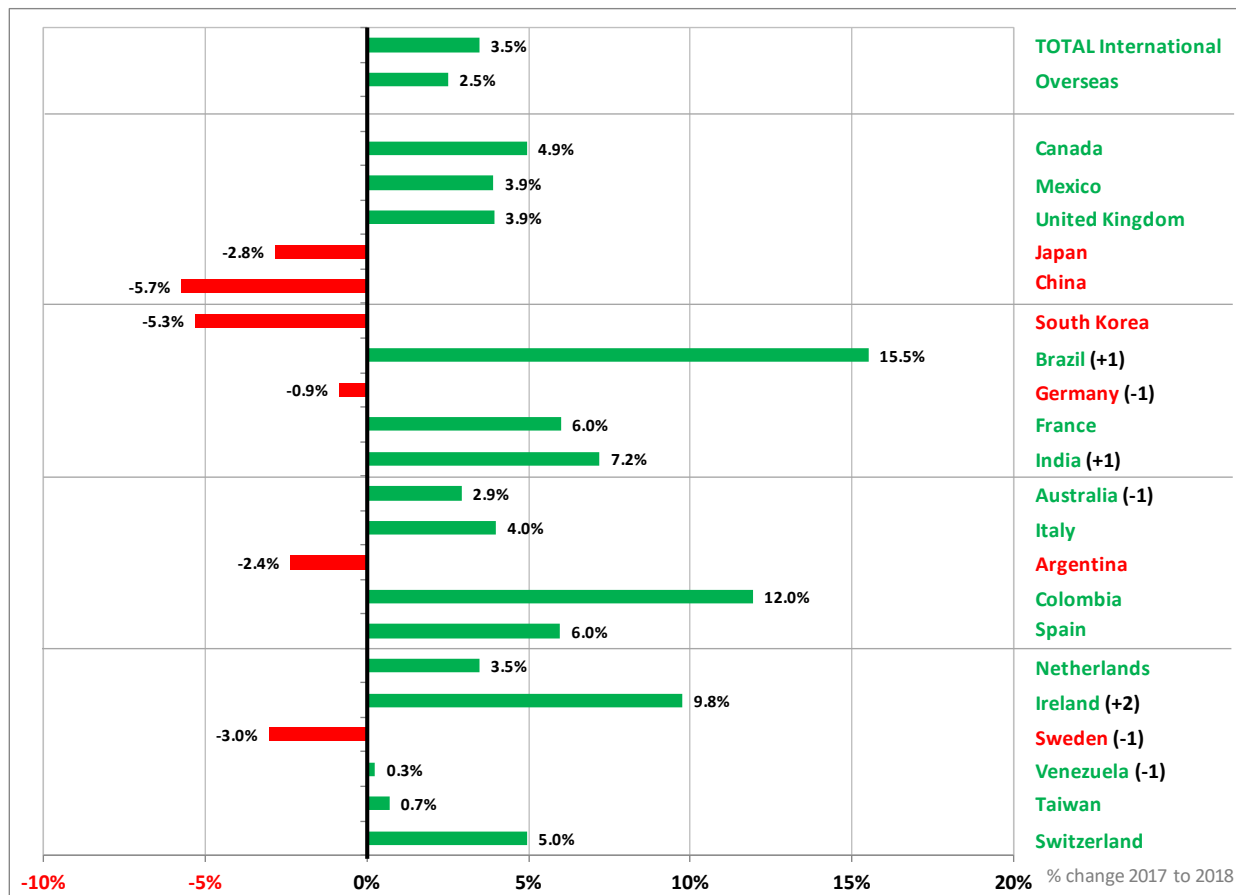
| U.S. VISITOR ARRIVAL COUNT 2018 | | |
|---------------------------------|--------------------|----------|
| COUNTRY OF RESIDENCE | NUMBER OF ARRIVALS | % CHANGE |
| TOTAL INTERNATIONAL | 79,617,625 | 3.5 |
| OVERSEAS | 39,883,361 | 2.5 |
| CANADA | 21,211,109 | 4.9 |
| MEXICO | 18,523,155 | 3.9 |
| UNITED KINGDOM | 4,659,178 | 3.9 |
| JAPAN | 3,493,313 | -2.8 |
| CHINA, PRC | 2,991,813 | -5.7 |
| SOUTH KOREA | 2,210,597 | -5.3 |
| BRAZIL | 2,209,372 | 15.5 |
| GERMANY | 2,062,462 | -0.9 |
| FRANCE | 1,767,461 | 6.0 |
| INDIA | 1,378,035 | 7.2 |
| AUSTRALIA | 1,362,431 | 2.9 |
| ITALY | 1,073,383 | 4.0 |
| ARGENTINA | 994,035 | -2.4 |
| COLOMBIA | 942,617 | 12.0 |
| SPAIN | 876,248 | 6.0 |
| NETHERLANDS | 725,283 | 3.5 |
| IRELAND | 530,802 | 9.8 |

Source: CBP/NTTO

Visitor Volume Change 2017 to 2018

- The 3.9% increase in Mexican visits helped create a positive shift in visitor arrivals.
- Moreover, a 4.9% increase in Canadian visits registered a significant increase in visitor arrivals.
- Overseas visitation increased 2.5% which boosted volume growth, but less than Canada on its own.

* Numbers in parentheses denote a shift in rank from 2018 over 2017. Brazil moved up one to 7th, Germany dropped one to 8th.



Source: NTT

Visitor Spending 2018 (\$billions)

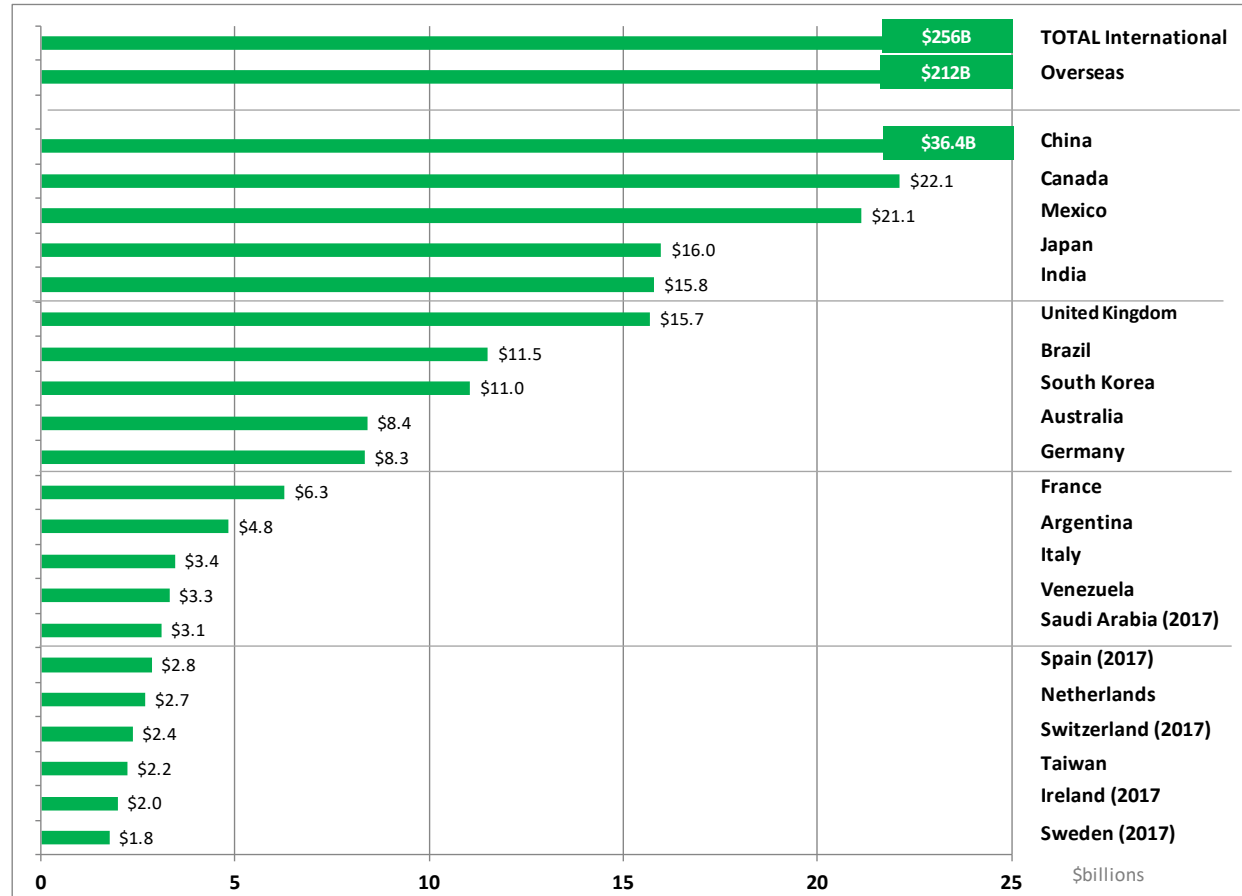
Total International \$256B

Overseas \$212B

Canada \$22.1B

Mexico \$21.1B

China was the top overseas spender
at \$36.4B



Source: NTTO, BEA

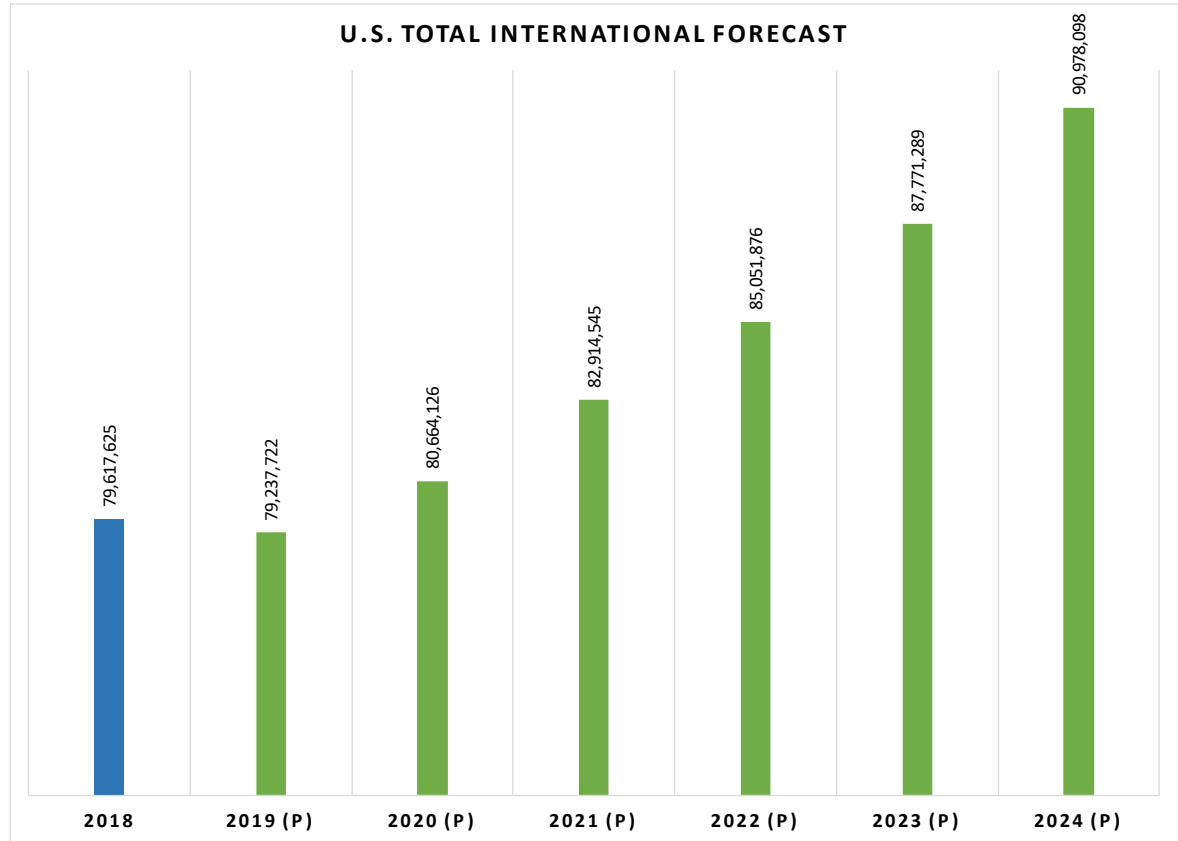
U.S. International Visitor Forecast

- 91 million visitors by 2024.
- Visits projected to increase 14% between 2018 – 2024.
- Growing (+2.2% GAGR).

CAGR = Compound Annual Growth Rate

P = Projected

14% Growth 2018-2024



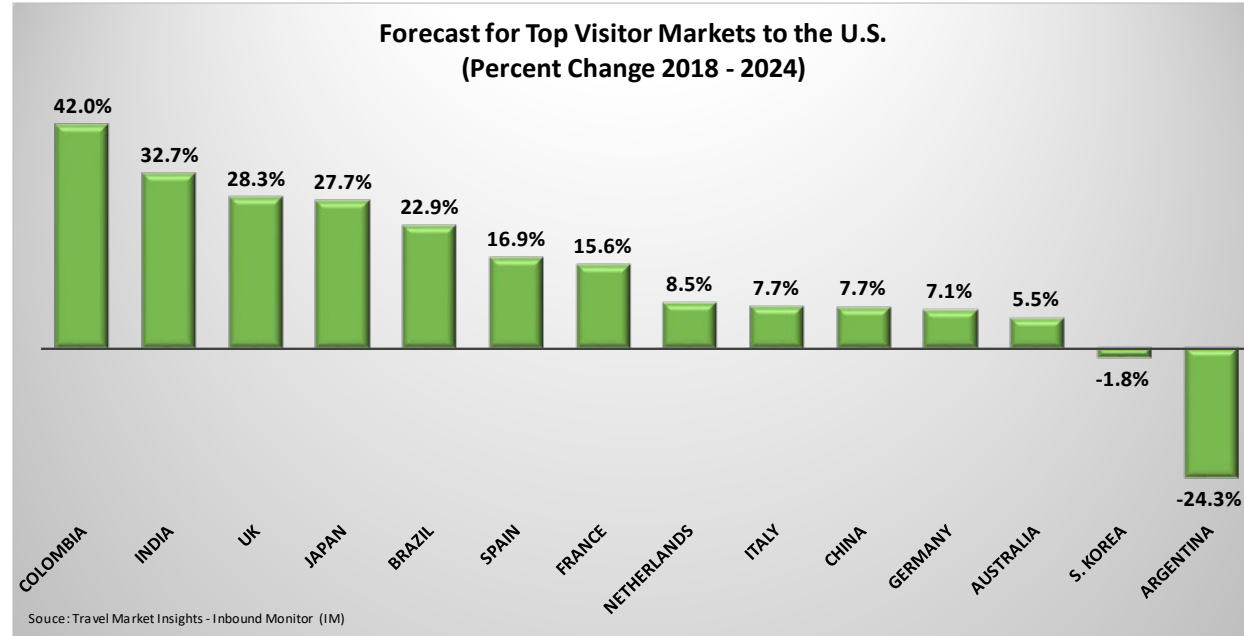
Sources: Travel Market Insights Inc. Inbound Travel Monitor; StatCan; Banco de Mexico; USDOC/NTTO I-94 & SIAT; DHS/NTTO APIS; UNWTO; IATA; Airports Council International; Census; BEA.

U.S. Overseas Visitor Forecast

Forecast subject to adjustment:

- Colombia is leading the pack for growth, followed by India.
- China, which dominated growth since 2010, will fall back to be the 10th fastest growing market (if trade war ends, economy does not slow down too much, and currency does not get too devaluated).
- Colombia is projected to grow faster than China through 2024.
- South Korea, which was projected to grow much faster, has also slowed (was ranked as the second fastest market). (Visa Waiver country)
- Not all growth will be from emerging markets as some European markets register stronger growth.

45 million overseas visitors by 2024

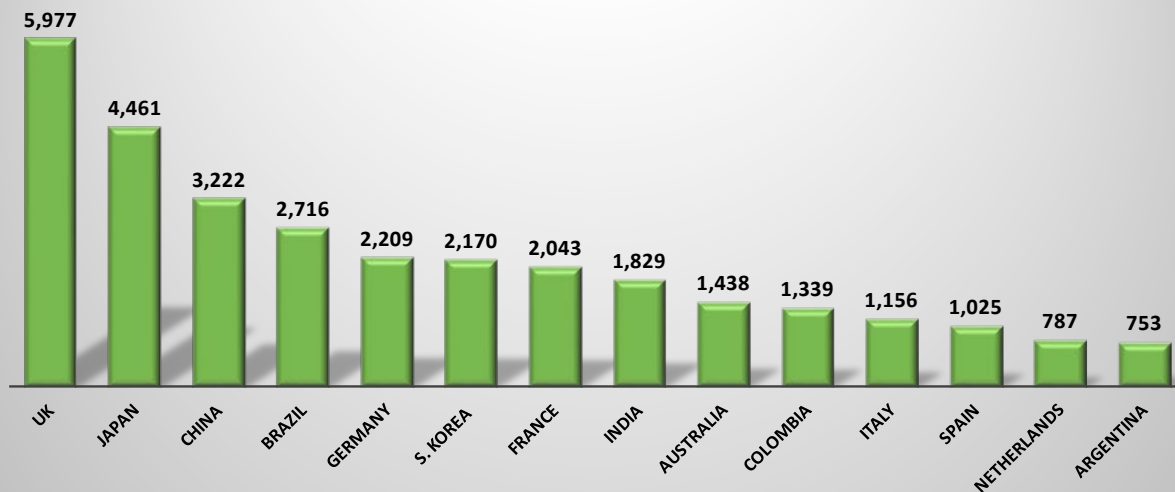


U.S. Overseas Visitor Forecast

- The UK will still be the top visitor market by 2024.
- Japan will rank second, followed by China by 2024.
- 2 of the top 5 markets will be from Asia by 2024.
- 12 overseas countries will all register more than 1 million visitors by 2024.

Visitors to the U.S. in 2024

Forecast for Top Visitor Markets to the U.S.
2024 Rank by Visitor Volume (in 000's)



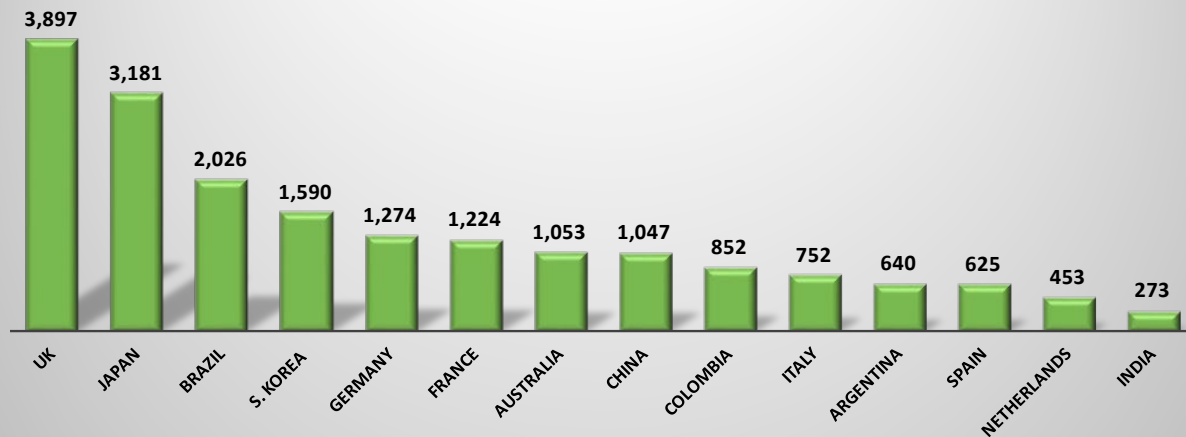
Source: Travel Market Insights - Inbound Monitor (IM)

U.S. Overseas Vacation Visitor Forecast

- The UK will be the top vacation visitor market by 2024.
- Japan will rank 2nd and Brazil will nudge out South Korea – both ahead of Germany for vacation visitors.
- Note: India which ranked as the 8th largest visitor market by 2024 will rank as the 14th largest vacation visitor market by 2024.

Vacation Visitors to the U.S. in 2024

Forecast for Top Vacation (Main PoT) Visitors to the U.S.
2024 Rank by Visitor Volume (in 000's)



Source: Travel Market Insights - Inbound Monitor (IM)



Overseas Visitors to Fort Lauderdale - 2018



2018 Fort Lauderdale Overseas Visitors

- In 2018 nearly 1 million overseas visitors explored Fort Lauderdale.
- The 1 million visitors accounted for 1.7 million room nights in Fort Lauderdale.
- \$2 Billion was spent in Fort Lauderdale by the 1 million visitors.

Note: Overseas includes all world regions excluding North America (Canada and Mexico).



969,000 Visitors



1.7 Million Room Nights



\$2.0 Billion Direct
Spending

2018 Overseas Visitor Spending

- \$318 average spending per day
- 6.5 Nights
- 4.7 Nights in Paid Lodging
- \$2,065 spending per visitor per stay in Fort Lauderdale



| 2018 Overseas Visitor Total Direct Spending | |
|--|-----------------|
| Overseas to Fort Lauderdale | |
| Total Direct Spending | \$2,001,000,000 |
| Spending/visitor/stay | \$2,065 |
| Spending/visitor/day | \$318 |



Overseas visitors spent 6.5 nights exploring Fort Lauderdale



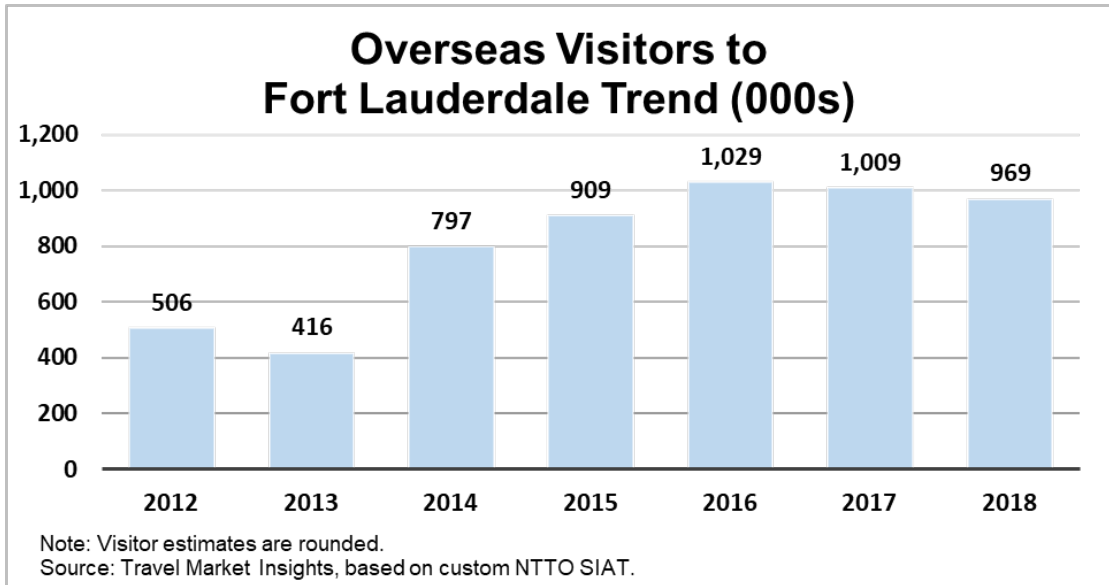
Overseas visitors stayed in paid lodging 4.7 nights

Fort Lauderdale Overseas Visitors

- In 2018 nearly 1 million overseas visitors explored Fort Lauderdale.
- Visits remained well above historical volume levels.
- Visits contracted by 40,000 from 2017 visits.

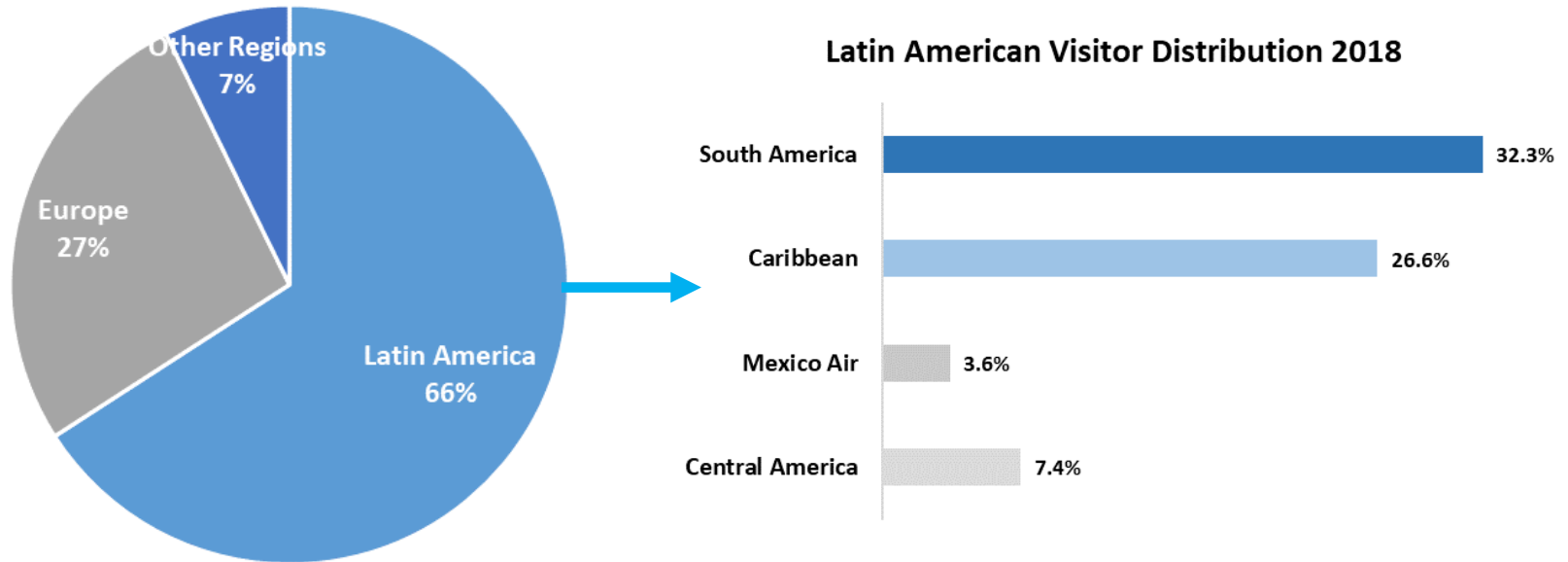
| Overseas Visitors to Fort Lauderdale | | | | |
|--------------------------------------|------------|-----------|---------|-----------------------|
| | 2016 (R) | 2017 | 2018 | % Change 2018/2017 |
| All Overseas | 1,029,000 | 1,009,000 | 969,000 | -3.9% |

Source: TMII



Source: TMII

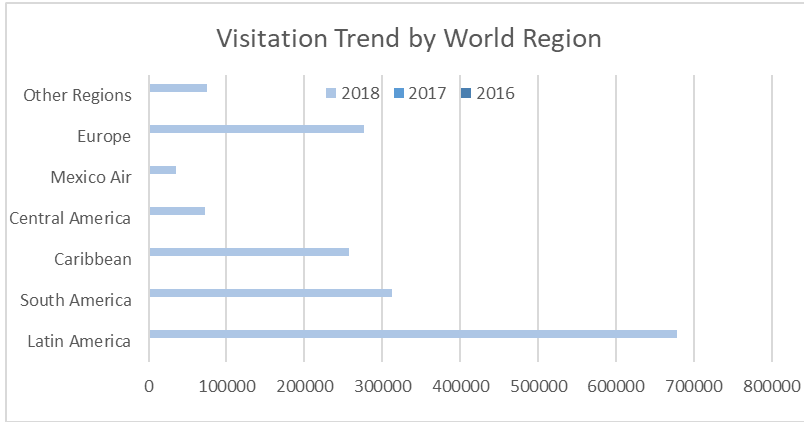
2018 Fort Lauderdale Overseas Visitors



Origins of Overseas Visitors

| | 2018 |
|-----------------|---------|
| All Overseas | 969,000 |
| Latin America | 678,000 |
| South America | 313,000 |
| Caribbean | 258,000 |
| Central America | 72,000 |
| Mexico Air | 35,000 |
| Europe | 276,000 |
| Other Regions | 75,000 |

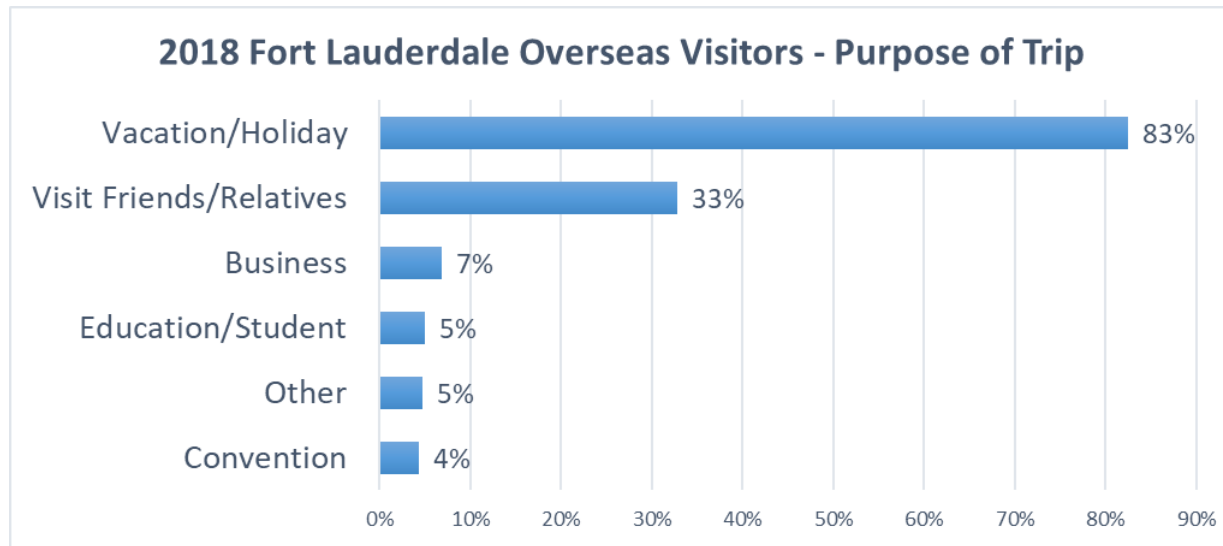
Other Regions include: Asia, Oceania, Middle East, and Africa.



2018 Visits by World Region

2018 Purpose of Visit

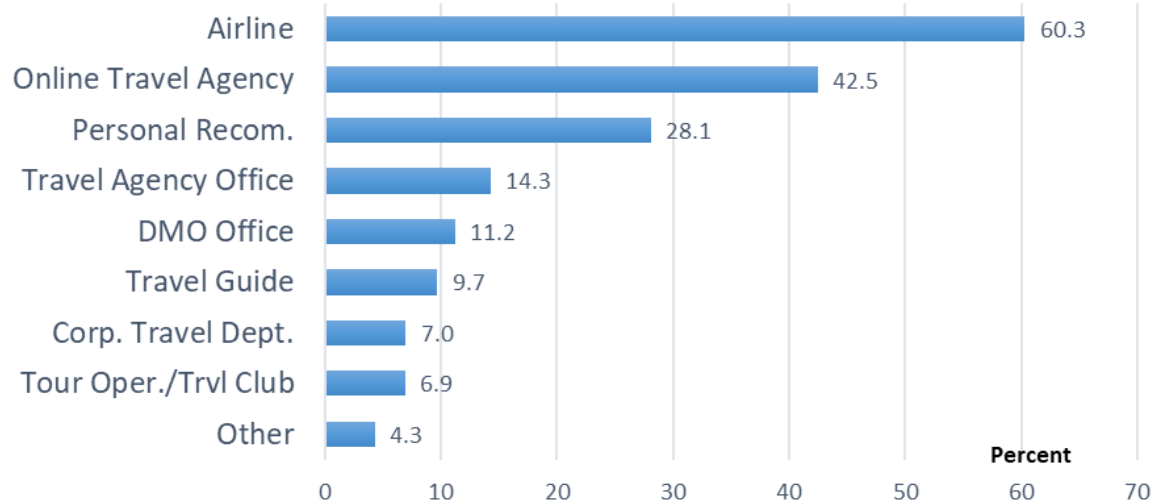
- Vacation was the top reason visitors came to Fort Lauderdale.
- VFR was relatively strong at 33%.
- Business, education, convention, and other all were below 10%, but combined accounted for 21%.



2018 Information Sources

- Airlines were the top information source for overseas travelers that visited Fort Lauderdale.
- OTAs ranked 2nd
- Personal recommendations/social media ranked 3rd
- Travel agencies are still relevant ranking 4th
- Destination Marketing Organization/Office rounded out the top five information sources.

Fort Lauderdale - Overseas Information Sources*



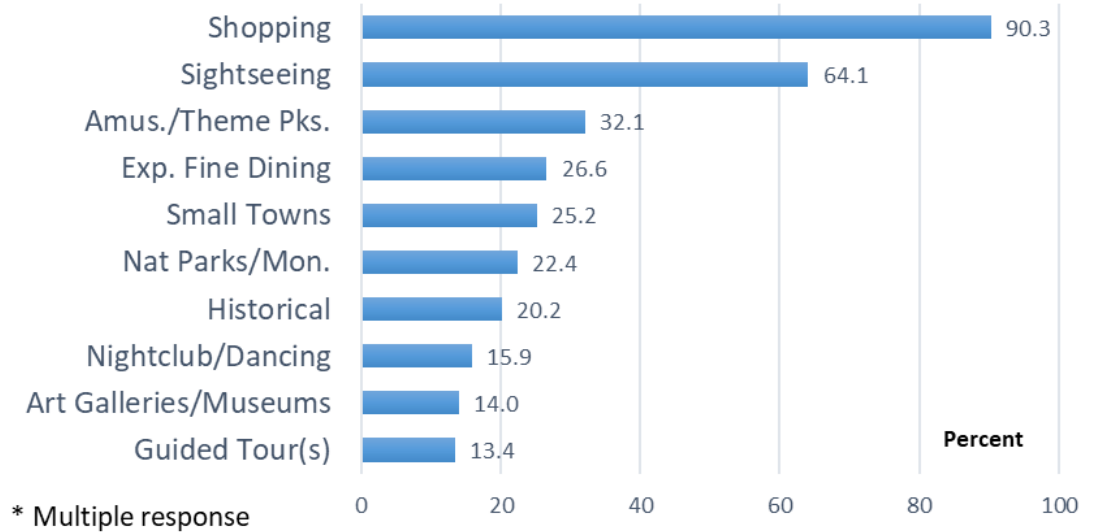
* Multiple response

- ✓ 88% of visitors obtained travel information online
- ✓ 31% of visitors obtained travel information by voice contact
- ✓ 5% of visitors obtained travel information from other media

2018 Top Visitor Activities



2018 Fort Lauderdale Activities - Overseas*



First-Time vs Repeat Visitors

- 90% of overseas visitors to Fort Lauderdale in 2018 were repeat travelers to the U.S.
- 11% of the overseas visitors were visiting the U.S. for the first time.
- Fort Lauderdale “repeat visitor” visited the U.S. 2.3 times on average in 2018.

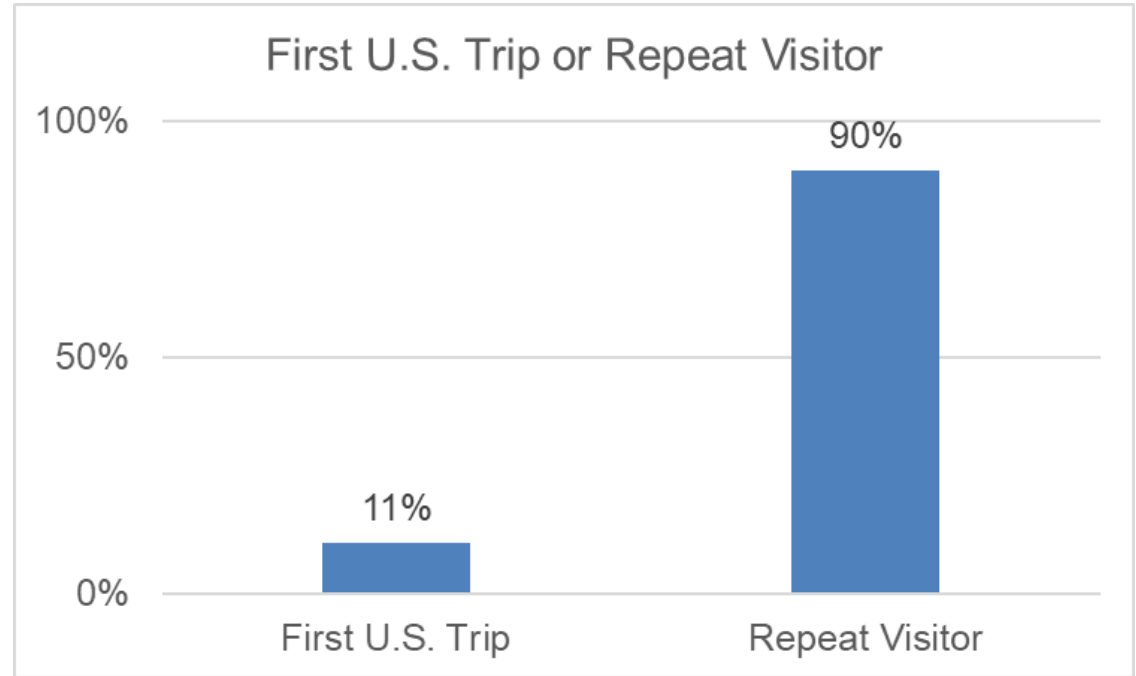
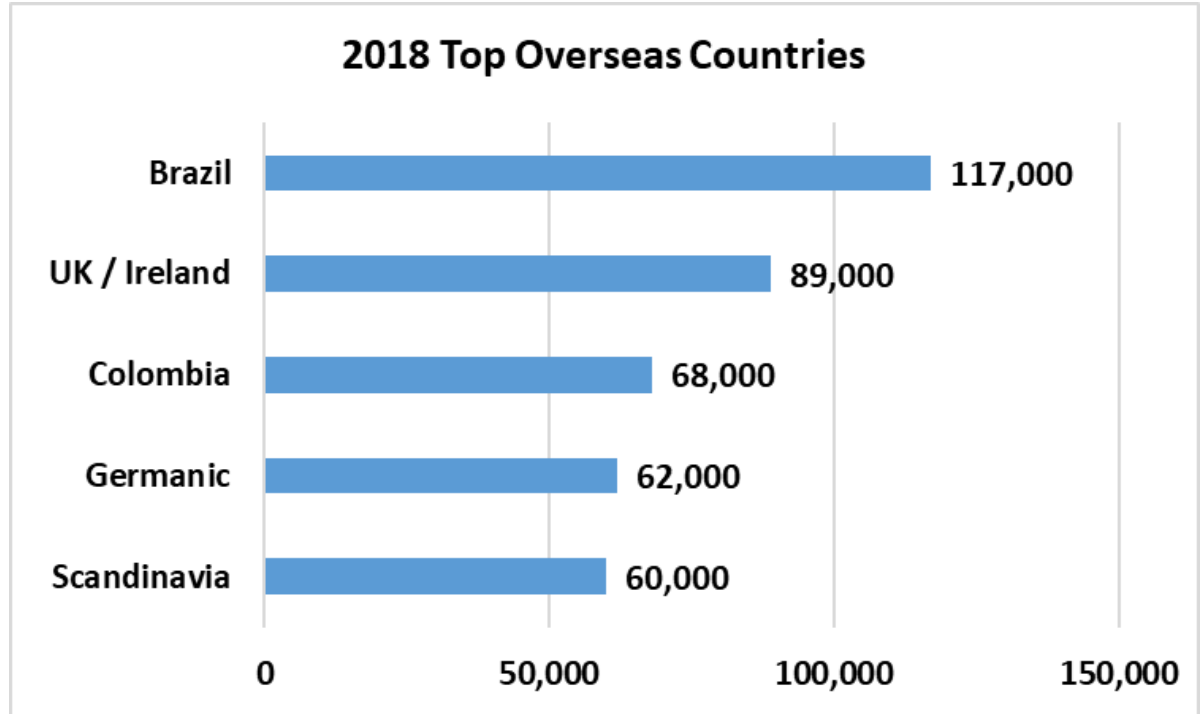


Chart may not equal 100% due to rounding.

2018 Overseas Visitors - Key Characteristics

- 969,000 visitors
- 799,000 vacation visitors
- \$2 Billion in direct spending
- \$2,065 per visitor per stay
- \$318 per visitor per day
- 1.7 million room nights generated
- 6.5 nights spent in Fort Lauderdale (15 nights in U.S.)
- 4.7 nights spent in lodging in Fort Lauderdale
- 53% traveled alone, 26% with partner, 21% family, 13% with children, 5% friends
- Average party size 1.8 persons (2.0 for vacation visitors)
- 55% of visitors rented a car, 39% used a private auto
- 45% of visitors used FLL as a port of entry (28% used Miami)
- 67% pre-booked lodging before visit
- Booked trip 2.5 months prior to visit
- \$71,000 mean annual income
- 66% stayed in paid lodging (70% for vacation)
- Visited 2.6 destinations on average during trip
- 53% Male (46 yrs. old), 47% Female (43 yrs. old)

2018 Fort Lauderdale Top Overseas Countries



Germanic = Germany, Austria, Switzerland

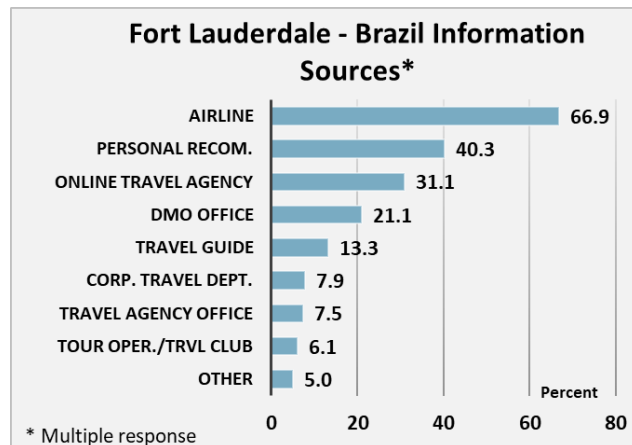
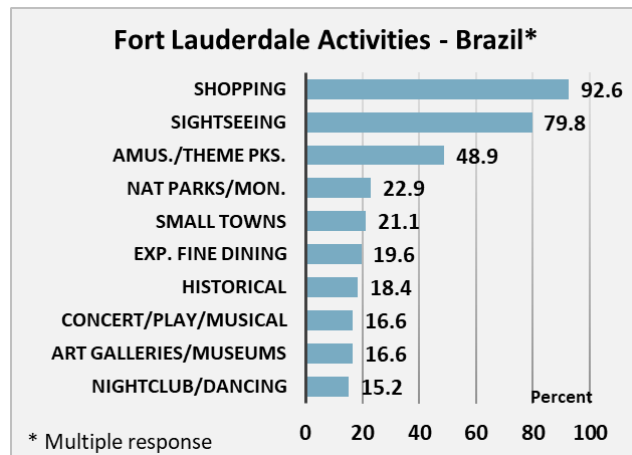
Scandinavia = Sweden, Norway, Denmark, Finland

Brazil

- 117,000 Visitors in 2018
- Staying in FTL 7 nights (5 in paid lodging)
- Spending \$265M in FTL
- Each person spending \$2,276 per trip & \$340 per night in FTL
- 179,000 room nights sold in FTL
- Share of nights 45.6%
- 93% Vacation (main and/or secondary)
- Top Activities On Trip: shopping, sightseeing, theme parks, national parks (multiple response)
- Top Info. Sources: airlines, personal recommendation, OTAs, DMOs (multiple response)

| 2018 Brazil Visitor Highlights | |
|--------------------------------------|---------|
| | 2018 |
| Estimated Arrivals | 117,000 |
| Market Share | 5.28% |
| Nights in Fort Lauderdale | 6.7 |
| Stayed in hotel | 62.5% |
| Nights in hotel | 4.9 |
| Rm. Nights Sold | 179,156 |
| Nights in U.S. | 14.7 |
| Share of Nights | 45.6% |
| Trip Purpose (main and/or secondary) | |
| Visit Friends/Relatives | 16.8% |
| Vacation/Holiday | 93.2% |
| Business | 2.9% |
| Convention | 1.0% |
| Education/Student | 6.5% |
| Other | 3.1% |
| Florida Main Destination | 88.8% |
| States Visited | 1.2 |

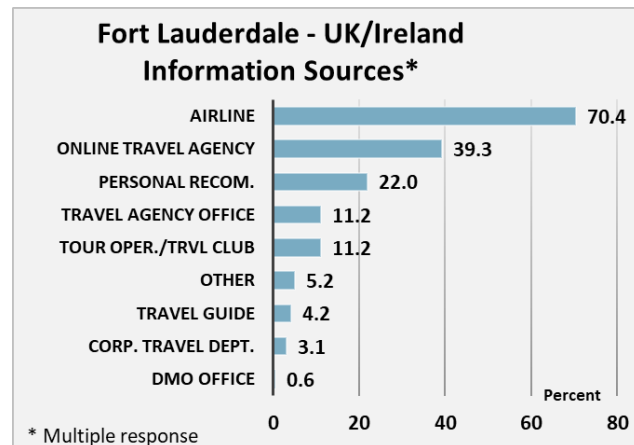
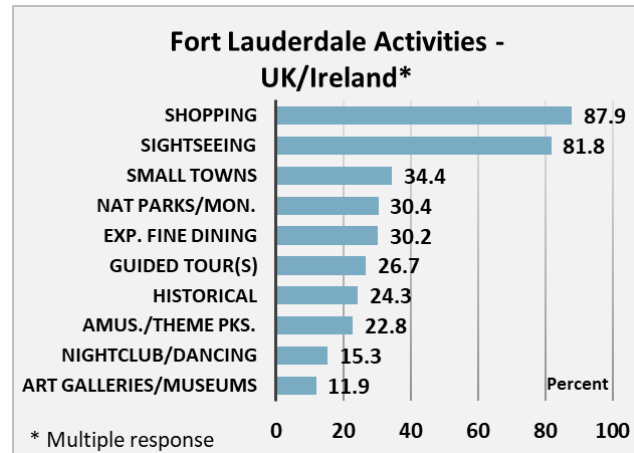
| 2018 Brazil Visitor Total Direct Spending | |
|--|---------------------------|
| | Brazil to Fort Lauderdale |
| Total Direct Spending | \$265,000,000 |
| Spending/visitor/stay | \$2,276 |
| Spending/visitor/day | \$340 |



UK/Ireland

- 89,000 Visitors in 2018
- Staying in FTL 6.6 nights (3.7 in paid lodging)
- Spending \$92M in FTL
- Each person spending \$1,027 per trip & \$156 per night in FTL
- 133,000 room nights sold in FTL
- Share of nights 44.9%
- 83% Vacation (main and/or secondary)
- Top Activities On Trip: shopping, sightseeing, small towns, national parks (multiple response)
- Top Info. Sources: airlines, OTAs, personal recommendation, travel agency (multiple response)

| 2018 UK/Ireland Visitor Highlights | |
|---|--------------|
| | 2018 |
| Estimated Arrivals | 89,000 |
| Market Share | 1.92% |
| Nights in Fort Lauderdale | 6.6 |
| Stayed in hotel | 76.6% |
| Nights in hotel | 3.7 |
| Rm. Nights Sold | 132,760 |
| Nights in U.S. | 14.7 |
| Share of Nights | 44.9% |
| Trip Purpose (main and/or secondary) | |
| Visit Friends/Relatives | 27.4% |
| Vacation/Holiday | 82.7% |
| Business | 6.8% |
| Convention | 4.2% |
| Education/Student | 0.8% |
| Other | 1.6% |
| Florida Main Destination | 90.0% |
| States Visited | 1.1 |
| 2018 UK/Ireland Visitor Total Direct Spending | |
| UK/Ireland to Fort Lauderdale | |
| Total Direct Spending | \$92,000,000 |
| Spending/visitor/stay | \$1,027 |
| Spending/visitor/day | \$156 |

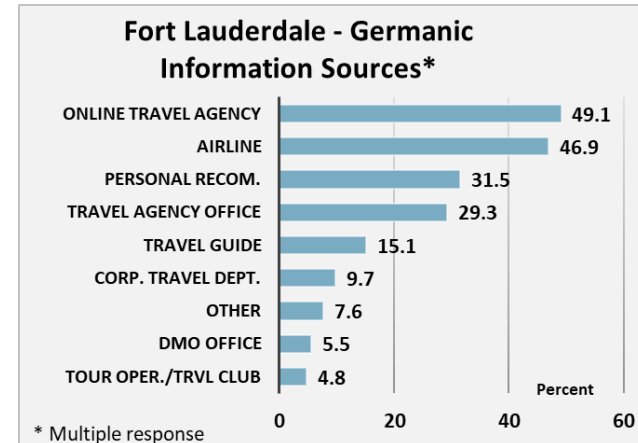
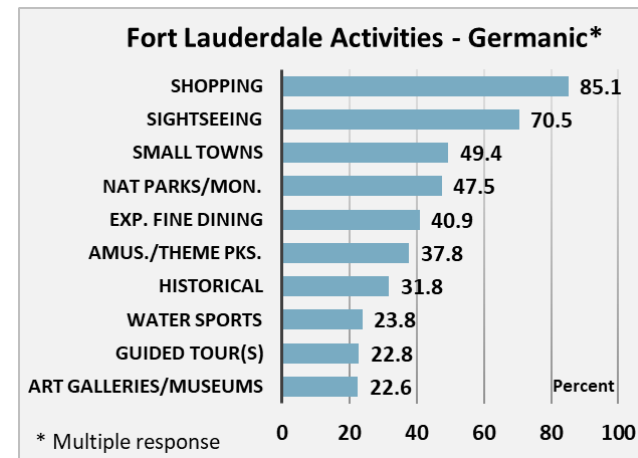


Germanic

(Germany, Austria, Switzerland)

- 63,000 Visitors in 2018
- Staying in FTL 5.1 nights (5.0 in paid lodging)
- Spending \$70M in FTL
- Each person spending \$1,110 per trip & \$218 per night in FTL
- 134,000 room nights sold in FTL
- Share of nights 33.8%
- 89% Vacation (main and/or secondary)
- Top Activities On Trip: shopping, sightseeing, small towns, national parks (multiple response)
- Top Info. Sources: OTAs, airlines, personal recommendation, travel agency (multiple response)

| 2018 Germanic Visitor Highlights | |
|---|--------------|
| | 2018 |
| Estimated Arrivals | 63,000 |
| Market Share | 2.31% |
| Nights in Fort Lauderdale | 5.1 |
| Stayed in hotel | 80.6% |
| Nights in hotel | 5.0 |
| Rm. Nights Sold | 133,626 |
| Nights in U.S. | 15.1 |
| Share of Nights | 33.8% |
| Trip Purpose (main and/or secondary) | |
| Visit Friends/Relatives | 14.3% |
| Vacation/Holiday | 89.1% |
| Business | 7.8% |
| Convention | 1.1% |
| Education/Student | 4.9% |
| Other | 0.5% |
| Florida Main Destination | 95.0% |
| States Visited | 1.4 |
| 2018 Germanic Visitor Total Direct Spending | |
| Germanic to Fort Lauderdale | |
| Total Direct Spending | \$70,000,000 |
| Spending/visitor/stay | \$1,110 |
| Spending/visitor/day | \$218 |

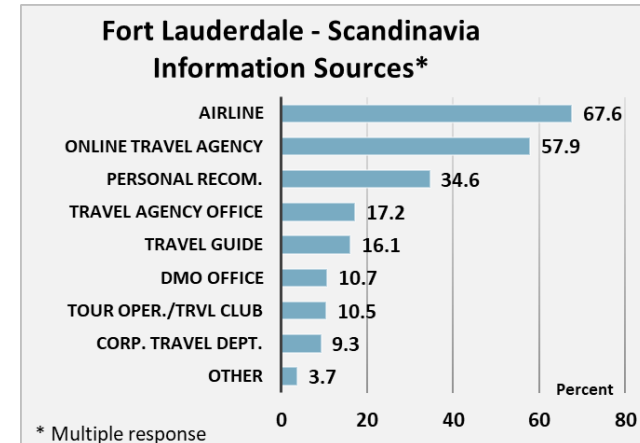
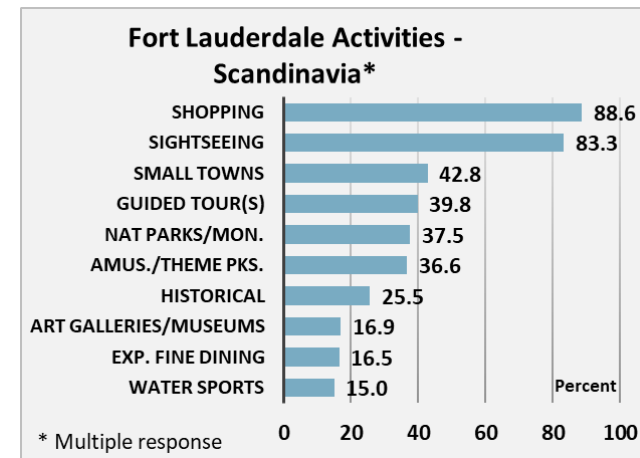


Scandinavia

(Sweden, Norway, Denmark, Finland)

- 60,000 Visitors in 2018
- Staying in FTL 7.0 nights (5.8 in paid lodging)
- Spending \$134M in FTL
- Each person spending \$2,241 per trip & \$320 per night in FTL
- 117,000 room nights sold in FTL
- Share of nights 44.9%
- 91% Vacation (main and/or secondary)
- Top Activities On Trip: shopping, sightseeing, small towns, guided tours (multiple response)
- Top Info. Sources: airlines, OTAs, personal recommendation, travel agency (multiple response)

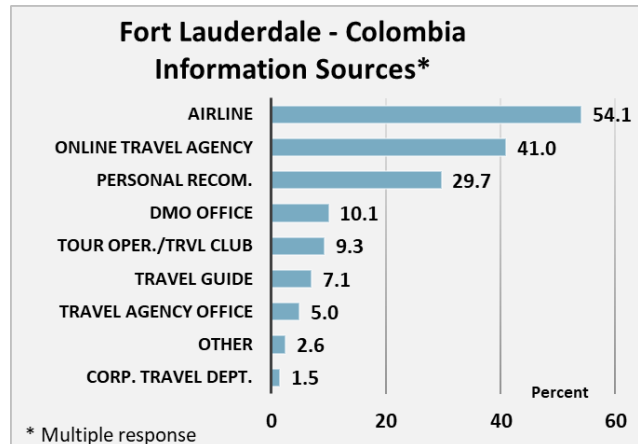
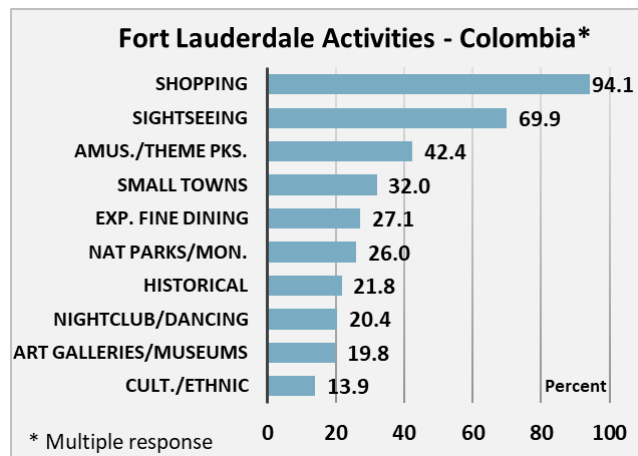
| 2018 Scandinavia Visitor Highlights | |
|---|---------------|
| | 2018 |
| Estimated Arrivals | 60,000 |
| Market Share | 4.76% |
| Nights in Fort Lauderdale | 7.0 |
| Stayed in hotel | 80.8% |
| Nights in hotel | 5.8 |
| Rm. Nights Sold | 117,160 |
| Nights in U.S. | 15.6 |
| Share of Nights | 44.9% |
| Trip Purpose (main and/or secondary) | |
| Visit Friends/Relatives | 27.1% |
| Vacation/Holiday | 91.4% |
| Business | 0.3% |
| Convention | 3.7% |
| Education/Student | 1.2% |
| Other | 0.4% |
| Florida Main Destination | 94.7% |
| States Visited | 1.3 |
| 2018 Scandinavia Visitor Total Direct Spending (preliminary) | |
| Scandinavia to Fort Lauderdale | |
| Total Direct Spending | \$134,000,000 |
| Spending/visitor/stay | \$2,241 |
| Spending/visitor/day | \$320 |



Colombia

- 68,000 Visitors in 2018
- Staying in FTL 9.3 nights (3.8 in paid lodging)
- Spending \$97M in FTL
- Each person spending \$1,432 per trip & \$154 per night in FTL
- 62,000 room nights sold in FTL
- Share of nights 52.0%
- 79% Vacation (main and/or secondary)
- Top Activities On Trip: shopping, sightseeing, theme parks, small towns (multiple response)
- Top Info. Sources: airlines, OTAs, personal recommendation, DMOs (multiple response)

| 2018 Colombia Visitor Highlights | |
|--|--------------|
| | 2018 |
| Estimated Arrivals | 68,000 |
| Market Share | 7.20% |
| Nights in Fort Lauderdale | 9.3 |
| Stayed in hotel | 38.5% |
| Nights in hotel | 3.8 |
| Rm. Nights Sold | 62,178 |
| Nights in U.S. | 17.9 |
| Share of Nights | 52.0% |
| Trip Purpose (main and/or secondary) | |
| Visit Friends/Relatives | 53.9% |
| Vacation/Holiday | 78.7% |
| Business | 12.6% |
| Convention | 2.5% |
| Education/Student | 3.7% |
| Other | 2.7% |
| Florida Main Destination | 92.2% |
| States Visited | 1.4 |
| 2018 Colombia Visitor Total Direct Spending (preliminary) | |
| Colombia to Fort Lauderdale | |
| Total Direct Spending | \$97,000,000 |
| Spending/visitor/stay | \$1,432 |
| Spending/visitor/day | \$154 |



2018 Overseas Visitors - Key Characteristics

If you took the overseas visitors from 2018 and added just 1 more night to their stay in Fort Lauderdale it would equate to:

- 356,000 more room nights
- \$308 million more in spending

Thank you!

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