



FLORIDA VISITOR ESTIMATES AND TRAVEL INDUSTRY TREND INDICATORS

Released May 13, 2022



VISITOR ESTIMATES METHODOLOGY UPDATE



As of the February 15, 2022 visitor estimates release, VISIT FLORIDA has adopted new estimates methodologies for Canadian and overseas visitors. A description of the updates is provided below. Please note that estimates using the old methodologies are not directly comparable to estimates using the new methodologies.

OVERSEAS

Previously, VISIT FLORIDA's estimates of overseas visitors to Florida were based on and extrapolated from aggregate card usage data provided by Visa Destination Insights and incorporated data from other independent research sources. Since the final data for a given year that is incorporated into the overseas methodology was not received until halfway through the subsequent year, estimates were considered preliminary and subject to revision until all final data is received.

Under the new methodology, VISIT FLORIDA's estimates of overseas visitors to Florida are extrapolated from I-94 international arrivals data collected by U.S. Customs and Border Protection. The I-94 visitor counts are adjusted based on data from Global Agency Pro in order to account for overseas visitors who go to another destination in the U.S. before later visiting Florida. This methodology has been retroactively applied to estimates from Jan 1, 2015 to present.

CANADA

VISIT FLORIDA's preliminary Canadian estimate is derived by analyzing historic visitor data alongside indicators of Canadian travel trends. Previously, final estimates were purchased from Statistics Canada, a government agency in Canada which no longer offers state level data. Under the new methodology, final estimates are developed by XBorder Canada based on large sample survey data and travel statistics collected by the Canadian government. This methodology applies to estimates from Jan 1, 2019 to present.

FLORIDA VISITOR ESTIMATES



Quarter One 2022

(January - March)



Revised Preliminary Calendar Year 2021

SUMMARY OF VISITOR ESTIMATES AND TRAVEL INDUSTRY INDICATORS



QUARTER ONE 2022: JANUARY - MARCH

Visitor Estimates:

- > Preliminary estimates indicate that *36.0* million total visitors (in person-trips) traveled to Florida during the first quarter of 2022, a +39.6% increase over Q1 2021. Visitation was +1.4% higher than in Q1 2019, marking a third consecutive quarter in which visitation exceeded pre-COVID levels. Domestic visitors accounted for *94.7%* of total visitors, while overseas and Canadian visitors accounted for *3.7%* and *1.6%*, respectively.
- > An estimated *34.1* million domestic visitors traveled to Florida during the first quarter of 2022, up +35.1% from Q1 2021 and +7.2% from Q1 2019.
- > The preliminary air/non-air split for domestic, non-resident visitors to Florida the first quarter of 2022 is estimated at *36.6% / 63.5%*. This is the highest share for air travel since the onset of the pandemic in Q1 2020.
- > Overseas visitation is estimated at *1.3 million* during Q1 2022, an increase of +168.9% from Q1 2021 but still down from 2019 by -41.9%.
- > Preliminary estimates indicate that Canadian visitation to Florida during Q1 2022 accounted for *578 thousand* visitors, up by +956.9% from Q1 2021 and down -60.0% from Q1 2019.

Travel Industry Trend Indicators:

- > Total enplanements at 19 Florida airports increased +70.1% during Q1 2022 compared to Q1 2021, and were down from Q1 2019 by -5.5%. Miami had the largest number of enplaned passengers with 6.3 million (+112.2%), followed closely by Orlando International with 5.8 million enplaned passengers (+66.7%). All 19 airports saw substantial growth compared to 2021, with notable increases in Jacksonville (+99.8%) and Melbourne (+99.4%).
- > Domestic enplanements at 19 Florida airports increased by +59.2% during Q1 2022 compared to Q1 2021, and slightly exceeded Q1 2019 by +0.8%. Domestic enplanements accounted for 85% of all enplanements during the period, down from 91% in Q1 2021 as international travel began to rebound in the wake of the U.S. ending travel bans on several countries in the prior quarter.
- > Quarterly hotel demand in Florida exceeded pre-COVID (2019) levels for the first time since the onset of the pandemic in Q1 2022. Compared to Q1 2021, the number of hotel rooms sold during the quarter grew +31.4%. The average daily rate (ADR) was up +38.3%, while the occupancy rate increased by +23.9%.

Note: Figures shown in italics are preliminary and subject to revision.

ESTIMATES OF VISITORS TO FLORIDA

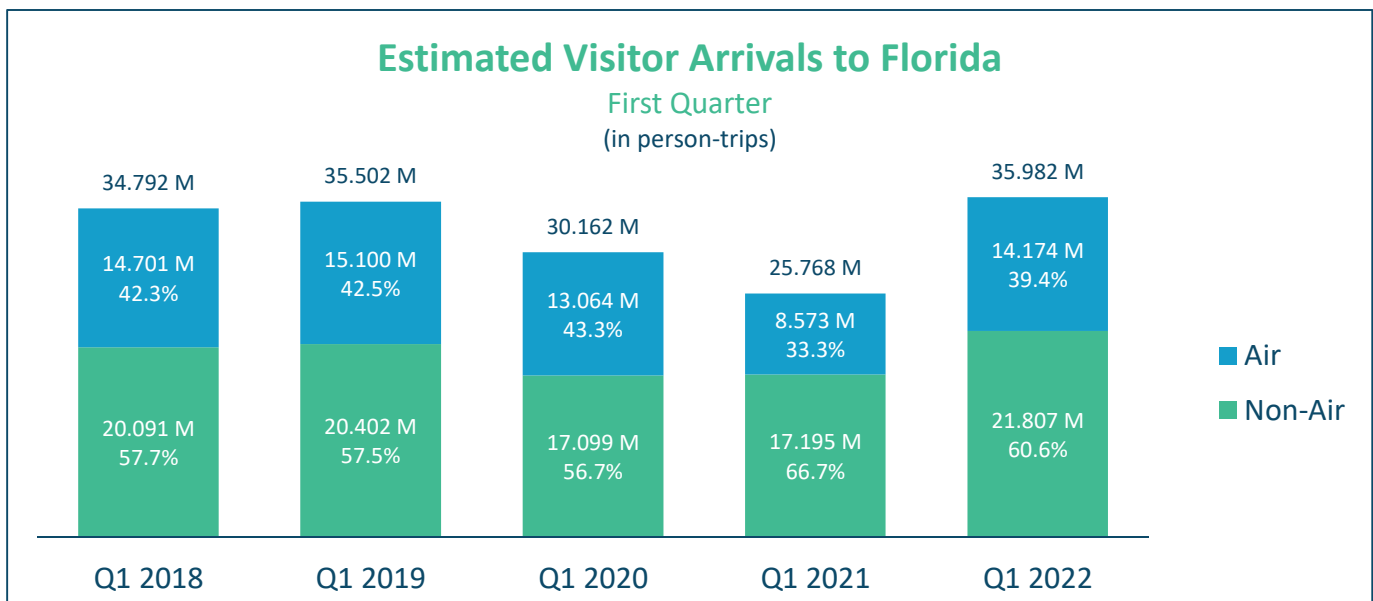


FIRST QUARTER, 2022 (JANUARY - MARCH)

PRELIMINARY

in person-trips

		DOMESTIC	OVERSEAS	CANADA	TOTAL	% OF TOTAL
2021	Air	8.046 M	492 K	35 K	8.573 M	33.3%
	Non-Air	17.175 M		20 K	17.195 M	66.7%
	Total	25.221 M	492 K	55 K	25.768 M	
2022	Air	12.457 M	1.323 M	395 K	14.174 M	39.4%
	Non-Air	21.624 M		183 K	21.807 M	60.6%
	Total	34.081 M	1.323 M	578 K	35.982 M	
% Change '22/'21		35.1%	168.9%	956.9%	39.6%	



Note: Figures in italics are considered preliminary. Figures have been rounded to the nearest thousand and may not sum to the total as a result. Figures shown in the table revised May 13, 2022.

Sources: TravelTrak America; D.K. Shifflet; Airline Data, Inc; U.S. Department of Commerce, National Travel & Tourism Office; Visa Destination Insights

ESTIMATES OF VISITORS TO FLORIDA



CALENDAR YEAR 2021 PRELIMINARY REVISED

in person-trips

		DOMESTIC	OVERSEAS	CANADA	TOTAL	% OF TOTAL
Q1	Air	<i>8.046 M *</i>	492 K	35 K	<i>8.573 M *</i>	33.3% *
	Non-Air	<i>17.175 M *</i>		20 K	<i>17.195 M *</i>	66.7% *
	Total	<i>25.221 M *</i>	492 K	55 K	<i>25.768 M *</i>	
	% Change '21/'20	<i>-7.1% *</i>	-72.0%	-95.6%	<i>-14.6% *</i>	
Q2	Air	<i>11.171 M *</i>	1.035 M	35 K	<i>12.241 M *</i>	38.3% *
	Non-Air	<i>19.689 M *</i>		6 K	<i>19.694 M *</i>	61.7% *
	Total	<i>30.860 M *</i>	1.035 M	41 K	<i>31.935 M *</i>	
	% Change '21/'20	<i>219.0% *</i>	4099.0%	1008.8%	<i>229.2% *</i>	
Q3	Air	<i>9.485 M *</i>	1.041 M	78 K	<i>10.604 M *</i>	32.3% *
	Non-Air	<i>22.224 M *</i>		53 K	<i>22.277 M *</i>	67.7% *
	Total	<i>31.709 M *</i>	1.041 M	131 K	<i>32.881 M *</i>	
	% Change '21/'20	<i>57.8% *</i>	729.5%	477.3%	<i>62.5% *</i>	
Q4	Air	<i>10.720 M *</i>	1.491 M	267 K	<i>12.478 M *</i>	39.7% *
	Non-Air	<i>18.870 M *</i>		91 K	<i>18.962 M *</i>	60.3% *
	Total	<i>29.590 M *</i>	1.491 M	359 K	<i>31.439 M *</i>	
	% Change '21/'20	<i>60.0% *</i>	197.7%	312.3%	<i>64.8% *</i>	
CY 2021	Air	<i>39.422 M *</i>	4.058 M	415 K	<i>43.896 M *</i>	36.0% *
	Non-Air	<i>77.958 M *</i>		169 K	<i>78.127 M *</i>	64.0% *
	Total	<i>117.380 M *</i>	4.058 M	584 K	<i>122.023 M *</i>	
	% Change '21/'20	<i>55.7% *</i>	68.6%	-57.0%	<i>54.1% *</i>	

* Revised since last estimates release

Note: Figures in italics are considered preliminary. Figures have been rounded to the nearest thousand and may not sum to the total as a result. Figures shown in the table revised May 13, 2022.

Sources: D.K. Shifflet; Airline Data, Inc; U.S. Department of Commerce, National Travel & Tourism Office; Global Agency Pro; XBorder Canada

TOURISM INDUSTRY TREND INDICATORS



Quarter One 2022

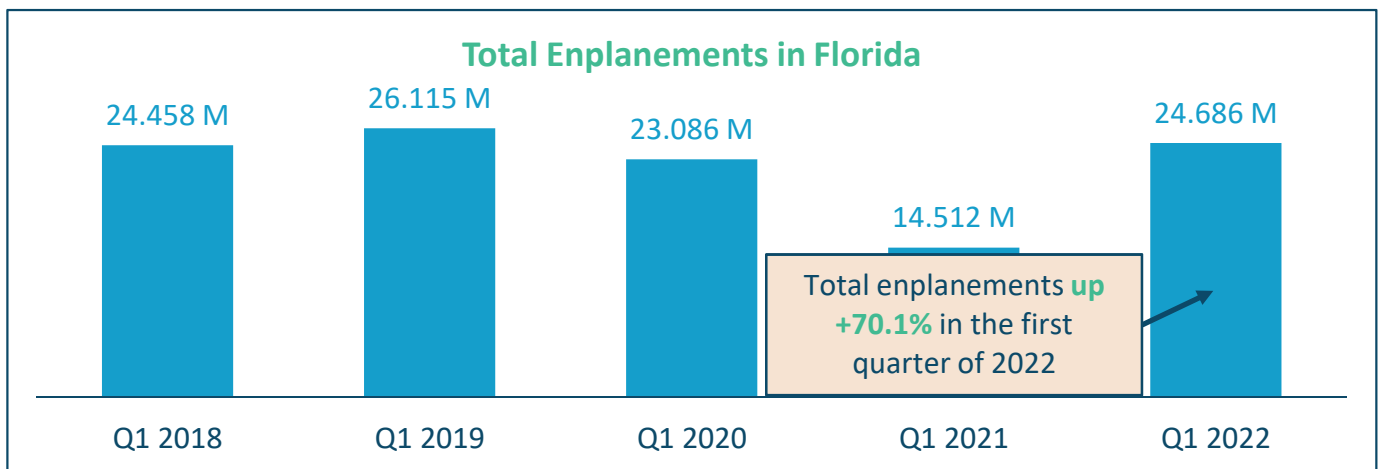
(January - March)

TOTAL ENPLANEMENTS



QUARTER ONE 2022 (JANUARY - MARCH)

AIRPORT	QUARTER ONE 2021	QUARTER ONE 2022	% CHANGE '22/'21
Daytona	53,796	77,465	44.0%
Destin-Fort Walton Beach	98,309	169,985	72.9%
Fort Lauderdale	2,737,819	3,843,887	40.4%
Fort Myers	1,276,680	1,852,186	45.1%
Gainesville	31,614	59,415	87.9%
Jacksonville	349,083	697,591	99.8%
Key West	158,466	210,426	32.8%
Melbourne	29,278	58,377	99.4%
Miami	2,963,801	6,288,491	112.2%
Orlando International	3,484,925	5,808,104	66.7%
Orlando Sanford	206,391	330,139	60.0%
Palm Beach	511,873	955,529	86.7%
Panama City	115,104	145,716	26.6%
Pensacola	160,499	254,260	58.4%
Punta Gorda	201,796	284,212	40.8%
Sarasota	277,074	542,722	95.9%
St. Petersburg-Clearwater	189,419	278,775	47.2%
Tallahassee	46,969	92,240	96.4%
Tampa	1,618,945	2,736,537	69.0%
Total	14,511,841	24,686,057	70.1%



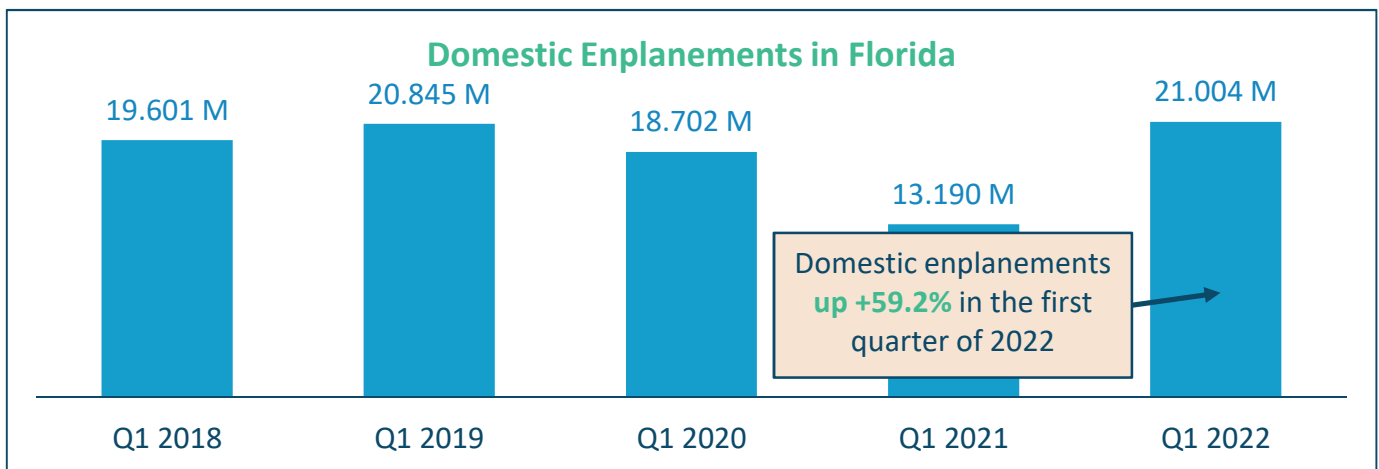
Source: Individual Airports

DOMESTIC ENPLANEMENTS



QUARTER ONE 2022 (JANUARY - MARCH)

AIRPORT	QUARTER ONE 2021	QUARTER ONE 2022	% CHANGE '22/'21
Daytona	53,796	77,465	44.0%
Destin-Fort Walton Beach	98,309	169,985	72.9%
Fort Lauderdale	2,391,794	3,168,504	32.5%
Fort Myers	1,274,220	1,814,122	42.4%
Gainesville	31,614	59,415	87.9%
Jacksonville	348,176	696,889	100.2%
Key West	158,466	210,426	32.8%
Melbourne	29,146	58,297	100.0%
Miami	2,085,207	3,899,392	87.0%
Orlando International	3,397,811	5,327,940	56.8%
Orlando Sanford	206,171	322,231	56.3%
Palm Beach	511,560	946,027	84.9%
Panama City	115,104	145,716	26.6%
Pensacola	160,499	254,260	58.4%
Punta Gorda	201,796	284,212	40.8%
Sarasota	277,074	542,722	95.9%
St. Petersburg-Clearwater	189,419	275,772	45.6%
Tallahassee	46,969	92,240	96.4%
Tampa	1,613,062	2,658,859	64.8%
Total	13,190,193	21,004,474	59.2%

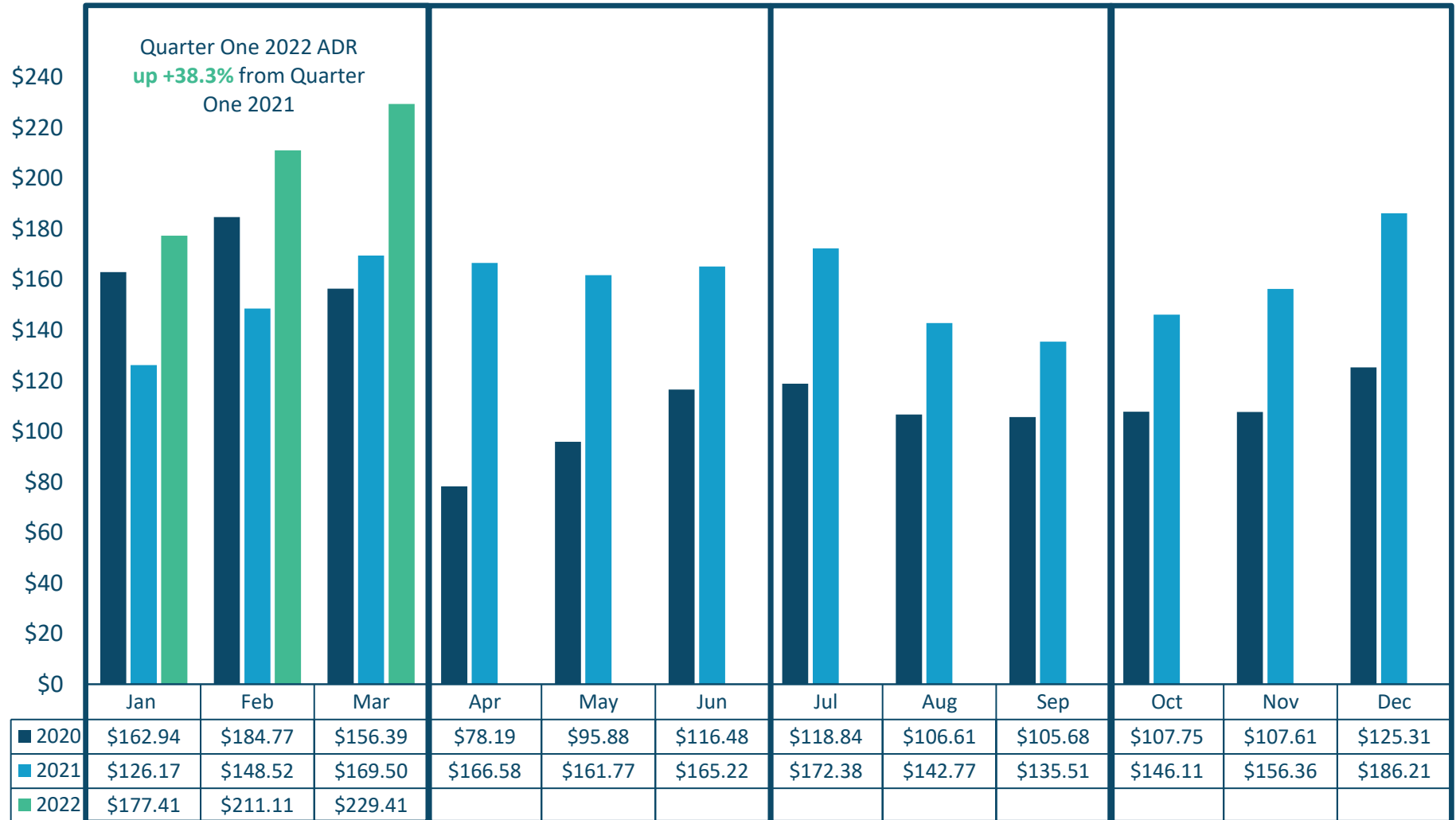


Source: Individual Airports

HOTEL AVERAGE DAILY RATE



CALENDAR YEARS 2020-2022

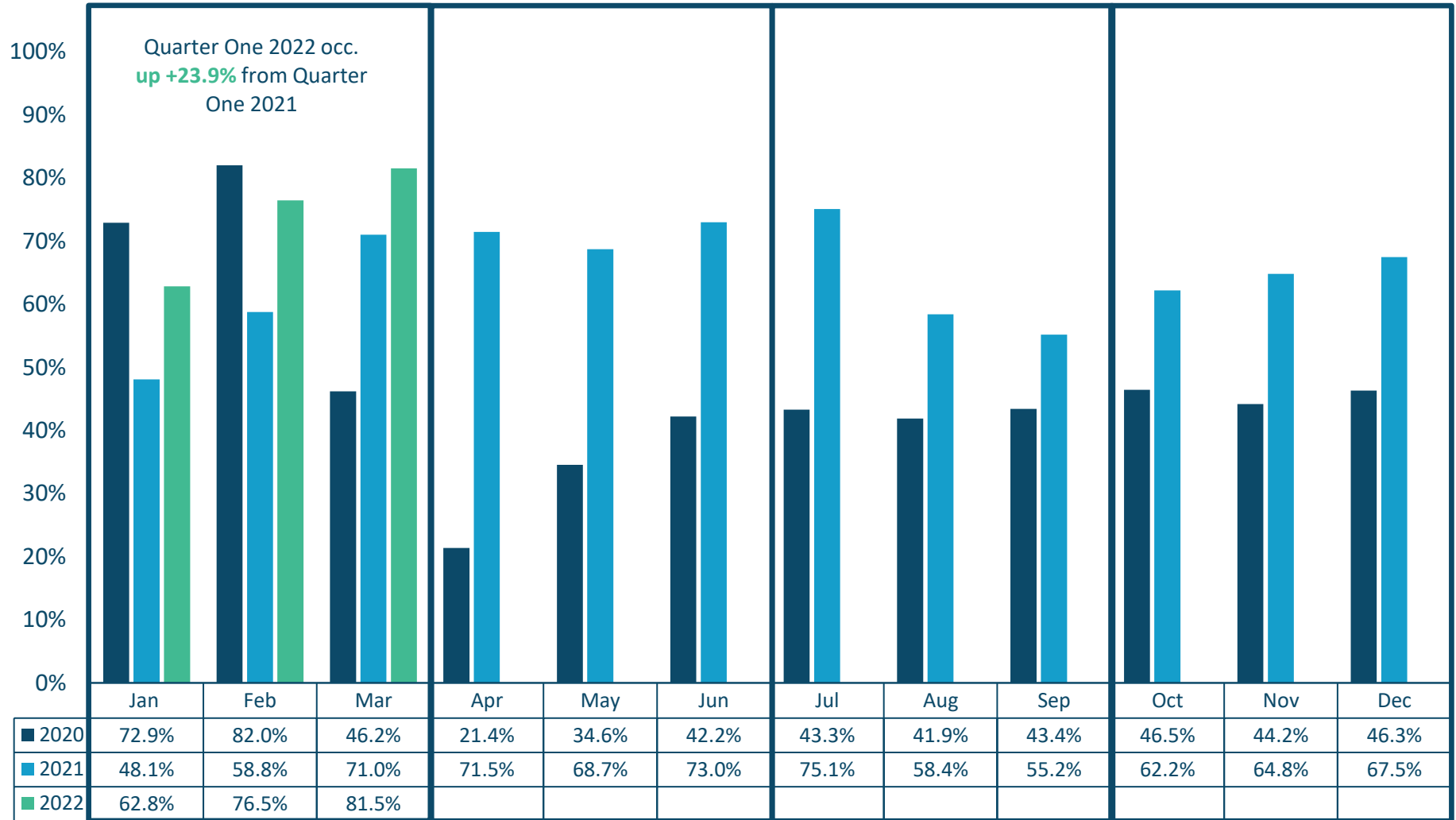


Source: STR

HOTEL OCCUPANCY RATE



CALENDAR YEARS 2020-2022

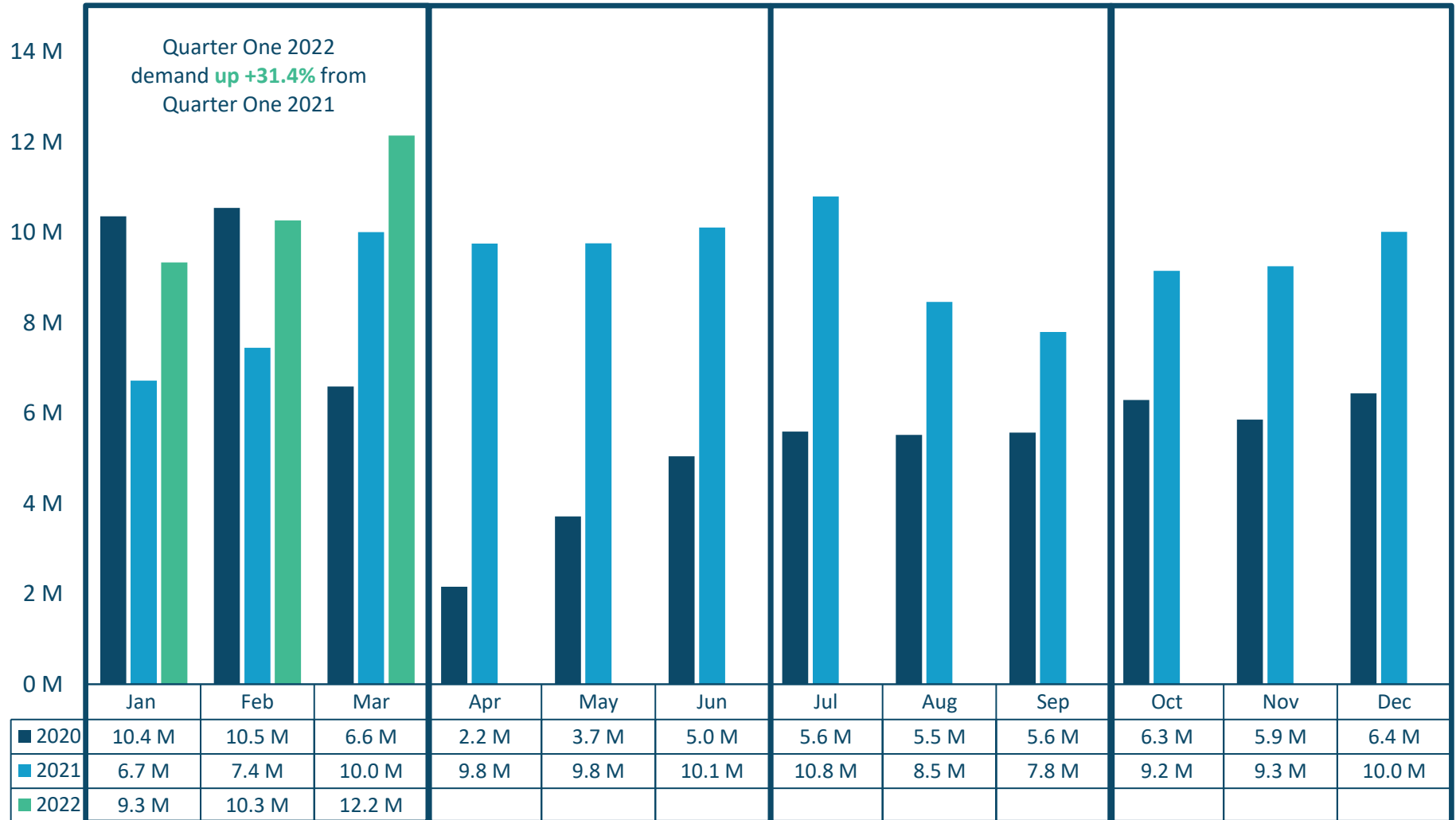


Source: STR

HOTEL ROOM-NIGHTS SOLD (IN MILLIONS)



CALENDAR YEARS 2020-2022



Source: STR

FLORIDA VISITOR ESTIMATES METHODOLOGY



The current methodology includes three components of the visitors to Florida:

- > Domestic Visitors (includes air and by non-air)
- > Canadian Visitors (includes air and by non-air)
- > Overseas Visitors (air visitors only)

DOMESTIC

VISIT FLORIDA collects enplanement data for 19 of Florida's airports used in developing a preliminary estimate of domestic visitors to Florida by air 45 days after the quarter ends. VISIT FLORIDA subscribes to Airline Data Inc. data that provides an actual air estimate of non-resident visitors to all Florida airports 100 days after the quarter ends, which is used to revise the estimate. In order to estimate non-air visitation, VISIT FLORIDA subscribes to D. K. Shifflet's Travelab dataset that provides the ratio of domestic air and non-air visitors to Florida. Collectively, this ratio and the data obtained from the airports are utilized to calculate the number of domestic non-air visitors to Florida. It is impractical to collect primary data on the non-air segment. (Non-air is dominated by private automobile, but not restricted to it in this new system.) This methodology applies to estimates from Jan 1, 2009 to present.

OVERSEAS

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CANADA

VISIT FLORIDA's preliminary Canadian estimate is derived by analyzing historic visitor data alongside indicators of Canadian travel trends. Final estimates are developed by XBorder Canada based on large sample survey data and travel statistics collected by the Canadian government. This methodology applies to estimates from Jan 1, 2019 to present.