2018-2019 VISITOR STUDY

Prepared by VISIT FLORIDA Research Department

Dear Partners and Friends:

VISIT FLORIDA, the state's official tourism marketing corporation, is committed to our vision of establishing Florida as the No. 1 travel destination in the world. In 2021, the Florida welcomed a total of 122 million visitors to the state, representing a 54 percent increase from the previous year, and our highest domestic visitation share ever recorded.

To continue this positive visitation trend and drive growth in Florida's tourism industry, VISIT FLORIDA relies on the latest cutting-edge data to guide our decision making and marketing strategy. As a resource to our Partners and the Florida travel industry, VISIT FLORIDA's Research Team develops and publishes this annual Florida visitor study that we are pleased to share with you.

The 2018-19 Florida Visitor Study serves as an in-depth, user-friendly tool providing a comprehensive overview of visitors to the state. The report's format offers historical context to ensure Florida's tourism trends can easily be identified and understood. To provide the most accurate and current data, VISIT FLORIDA's Research Team seeks out highly reliable sources, including the U.S. Census Bureau, the U.S. Department of Commerce, D.K. Shifflet, X-Border Canada and other independent sources.

VISIT FLORIDA Partners benefit from having free access to a variety of online research data, including this study and other extensive collections of market intelligence reports. This valuable insight allows our partners to develop their business strategies to best suit the needs of their customers, so they can provide unforgettable experiences for our visitors.

To learn more about becoming a VISIT FLORIDA Partner, contact our Industry Relations team at partner@visitflorida.org.

Sunny regards,

Dana D. Young

Dana Young

President and CEO

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TOURISM INDICATORS

SUMMARY OF FLORIDA TOURISM - 2018

Summary:

- Florida welcomed an estimated 126.3 million out-of-state domestic and international visitors in 2018, an increase of 7.5% from the 117.6 million estimated visitors who arrived in 2017.
- The ratio of visitors who traveled to Florida by air compared to those who traveled by non-air methods was 40.2% / 59.8% in 2018, with 34.1% of domestic visitors and 66.0% of Canadian visitors traveling by air.
- Florida's domestic visitation climbed to 112.8 million in 2018, up 8.3% from 2017. Overseas visitation was slightly higher than the pervious year, growing 0.3% to 10.0 million, while Canadian visitation grew 1.9% to reach 3.6 million.
- Florida's 19 major commercial airports saw a 7.6% year-over-year increase in total passenger enplanements in 2018, reaching 94.1 million. This represented an increase of 6.6 million enplanements compared to 2017.
- Georgia, New York, and Pennsylvania were the top three origin states for domestic visitors to Florida in 2018. Texas, the third-ranked origin state in 2017, fell to seventh place as it lost share and was displaced by Pennsylvania, Illinois, Alabama, and North Carolina.
- Canada was the top origin country for international visitors to Florida in 2018, sending 3.6 million visitors to the Sunshine State. Brazil and the United Kingdom rounded out the top 3. Overall, the top 10 origin countries accounted for 69% of international visitation in 2018.
- In 2018, local tourist option tax collections (including bed taxes and convention and tourist impact taxes) from 63 of Florida's counties totaled $1.101 billion. This constituted a 10.3% increase over 2017. The five counties with the highest tourist option tax collections – Orange ($279.6 million), Miami-Dade ($136.8 million), Broward ($86.9 million), Pinellas ($59.1 million), and Osceola ($58.6 million) – accounted for 56.4% of all such tax collections in 2018.
- Hotels in Florida sold 115.3 million rooms in 2018, an increase of 0.5% from the previous year. However, occupancy declined by 1.1% to 72.9% as room supply outpaced demand growth. Despite the decline in occupancy, Florida's ADR grew by a healthy 4.1% to reach $143.64.

SUMMARY OF FLORIDA TOURISM - 2019

Summary:

> An estimated 131.1 million out-of-state visitors traveled to Florida in 2019, marking an 11th consecutive year of growth.

> Florida visitors who traveled to the Sunshine State by air made up 40.9% of the total in 2019, with 35.0% of domestic visitors and 70.0% of Canadians choosing air travel as their method of transportation.

> Domestic out-of-state visitors to Florida numbered 117.2 million in 2019, accounting for 89.4% of total visitation over the course of the calendar year. Overseas visitors were estimated at 8.9 million, accounting for 7.5% of total visitation, while Canadian visitors were estimated at 4.1 million and accounted for 3.1%.

> Total passenger enplanements at Florida's 19 major commercial airports totaled 98.8 million in 2019, a 4.9% increase over 2018. This equated to 4.6 million additional enplanements compared to the previous year.

> Leisure visitors accounted for 93% of domestic out-of-state visitors in 2019, a rise of 4 percentage points from 2017, while the share of business travelers fell from 11% to 7% over the same 2-year period.

> New York, Georgia, and Texas topped the list of origin states in 2019. Pennsylvania fell to 6th place, down from 3rd place in 2018, as Texas and Ohio gained market share to surpass it.

> The average length of stay for domestic visitors was 4.2 nights, the same as the previous year, while the average expenditure per person per day grew 4% to $165.90.

> Florida's top origin country for international visitors, Canada, sent 4.1 million visitors to the Sunshine State in 2019, a gain of 15% from the previous year. The United Kingdom surpassed Brazil to reach second place, with an increase of 1% in visitors from 2018 while Brazil saw a decline of 5%. Total international visitation increased by 2%, with the top 10 origin countries accounting for 69% of the total.

> Local option tourist taxes collected from 63 of Florida's counties, including bed taxes and conference and tourist impact taxes, added up to $1.159 billion in 2019, an increase of 5.2% from the previous year. The counties with the largest collections were Orange ($288.0 million), Miami-Dade ($142.1 million), Broward ($89.0 million),

Pinellas ($64.4 million), and Osceola ($61.5 million), which collectively accounted for more than half (55.7%) of all such tax collections over the course of the year.

- Florida hotels experienced demand growth in 2019, selling 117.3 million rooms over the course of the year for an increase of 1.7% from 2018. The growth of supply outpaced demand, causing occupancy to trend down by 0.8% to 72.3%. ADR rose to $145.21, an increase of 1.1% from the previous year.

ESTIMATES OF VISITORS TO FLORIDA

Prepared by VISIT FLORIDA

Research Department

SUMMARY OF VISITORS TO FLORIDA

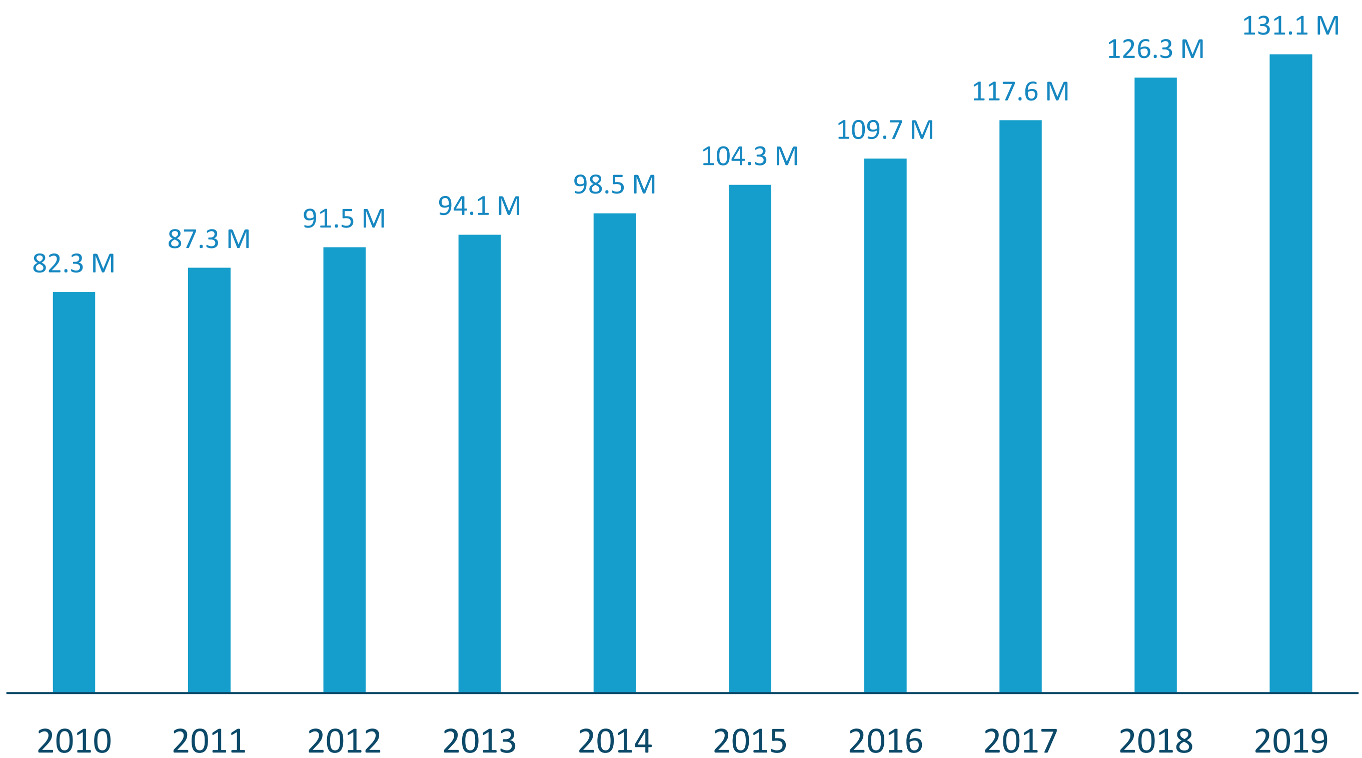
Florida marked an 11th consecutive year of visitation growth in 2019, welcoming an estimated total of 131.1 million out-of-state visitors. Domestic visitors accounted for 89.4% of the total, while overseas visitors were 7.5% and Canadian visitors were 3.1%. The total number of combined overseas and Canadian visitors fell to 13.9 million, down from the 2013 peak of 15.4 million.

The share of visitors who traveled to Florida by air was 40.9% in 2019, with 35.0% of domestic visitors and 70.0% of Canadian visitors taking to the skies to reach the Sunshine State.

One key indicator of the health of the travel industry, passenger enplanements, revealed solid growth in 2019. Across 19 Florida airports, total enplanements were up by +4.9% from 2018 with an increase of 4.6 million.

Note: The Canadian visitor estimates methodology was changed starting with data in 2018. The overseas estimates methodology was changed starting with data in 2015. Because of this, year-over-year changes during these time periods are influenced by changes in methodology, rather than just changes in actual visitation.

Total Florida Visitation: 2010-2019



Sources: TravelTrak America; D.K. Shifflet; Statistics Canada; X-Border Canada; U.S. Department of Commerce, ITA, Tourism Industries; Visa Travel Insights; Airline Data, Inc; ARC Global Agency Pro

ESTIMATES OF VISITORS TO FLORIDA

CALENDAR YEAR 2018
FINAL
in person-trips

		DOMESTIC	OVERSEAS	CANADA	TOTAL	% OF TOTAL
Q1	Air	11.157 M *	2.353 M *	917 K *	14.427 M	41.9%
	Non-Air	19.494 M *		496 K *	19.989 M	58.1%
	Total	**30.651 M ***	**2.353 M ***	**1.413 M ***	**34.416 M**	
	% Change '18/'17	10.1% *	6.4% *	2.5% *	9.5%	
Q2	Air	9.559 M *	2.365 M *	456 K *	12.379 M	39.5%
	Non-Air	18.472 M *		461 K *	18.934 M	60.5%
	Total	**28.031 M ***	**2.365 M ***	**917 K ***	**31.313 M**	
	% Change '18/'17	5.9% *	-4.3% *	1.3% *	4.9%	
Q3	Air	8.161 M *	2.603 M *	372 K *	11.136 M	35.6%
	Non-Air	20.001 M *		121 K *	20.122 M	64.4%
	Total	**28.162 M ***	**2.603 M ***	**493 K ***	**31.258 M**	
	% Change '18/'17	14.1% *	-1.7% *	0.8% *	12.4%	
Q4	Air	9.569 M *	2.680 M *	600 K *	12.848 M	43.8%
	Non-Air	16.373 M *		129 K *	16.501 M	56.2%
	Total	**25.941 M ***	**2.680 M ***	**728 K ***	**29.350 M**	
	% Change '18/'17	3.2% *	1.6% *	2.1% *	3.0%	
CY 2018	Air	38.445 M	10.001 M	2.344 M	50.790 M	40.2%
	Non-Air	74.340 M		1.206 M	75.546 M	59.8%
	Total	**112.785 M**	**10.001 M**	**3.551 M**	**126.337 M**	
	% Change '18/'17	8.3%	0.3%	1.9%	7.5%	

* 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 February 15, 2022.

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

ESTIMATES OF VISITORS TO FLORIDA

CALENDAR YEAR 2019

FINAL

in person-trips

		DOMESTIC	OVERSEAS	CANADA	TOTAL	% OF TOTAL
Q1	Air	11.827 M *	2.276 M *	996 K *	15.100 M	42.5%
	Non-Air	19.952 M *		450 K *	20.402 M	57.5%
	Total	**31.780 M ***	**2.276 M ***	**1.446 M ***	**35.502 M**	
	% Change '19/'18	3.7% *	-3.3% *			
Q2	Air	10.337 M *	2.443 M *	566 K *	13.345 M	41.4%
	Non-Air	18.638 M *		283 K *	18.920 M	58.6%
	Total	**28.974 M ***	**2.443 M ***	**848 K ***	**32.265 M**	
	% Change '19/'18	3.4% *	3.3% *			
Q3	Air	8.440 M *	2.502 M *	426 K *	11.369 M	35.0%
	Non-Air	20.854 M *		277 K *	21.132 M	65.0%
	Total	**29.295 M ***	**2.502 M ***	**703 K ***	**32.500 M**	
	% Change '19/'18	4.0% *	-3.9% *			
Q4	Air	10.391 M *	2.579 M *	875 K *	13.844 M	44.9%
	Non-Air	16.741 M *		216 K *	16.957 M	55.1%
	Total	**27.132 M ***	**2.579 M ***	**1.091 M ***	**30.801 M**	
	% Change '19/'18	4.6% *	-3.8% *			
CY 2019	Air	40.995 M	9.801 M	2.862 M	53.658 M	40.9%
	Non-Air	76.186 M		1.226 M	77.412 M	59.1%
	Total	**117.181 M**	**9.801 M**	**4.088 M**	**131.069 M**	
	% Change '19/'18	3.9%	-2.0%			

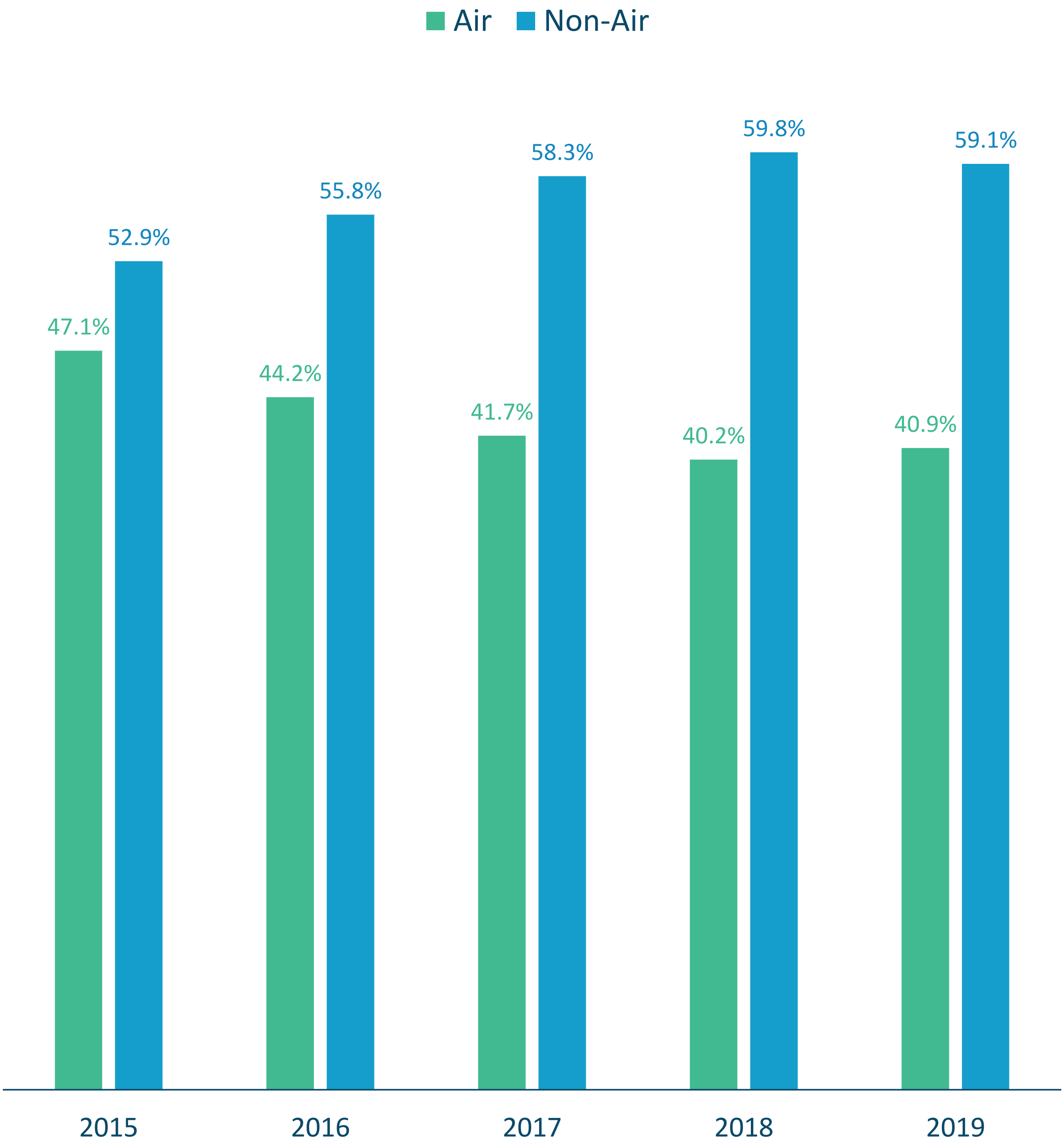
* Revised since last estimates release

Note: Canada methodology changed beginning in 2019, so Canada and total numbers are not directly comparable to 2018 estimates. Figures have been rounded to the nearest thousand and may not sum to the total as a result. Figures shown in the table revised February 15, 2022.

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

VISITOR SHARE BY TRANSPORTATION

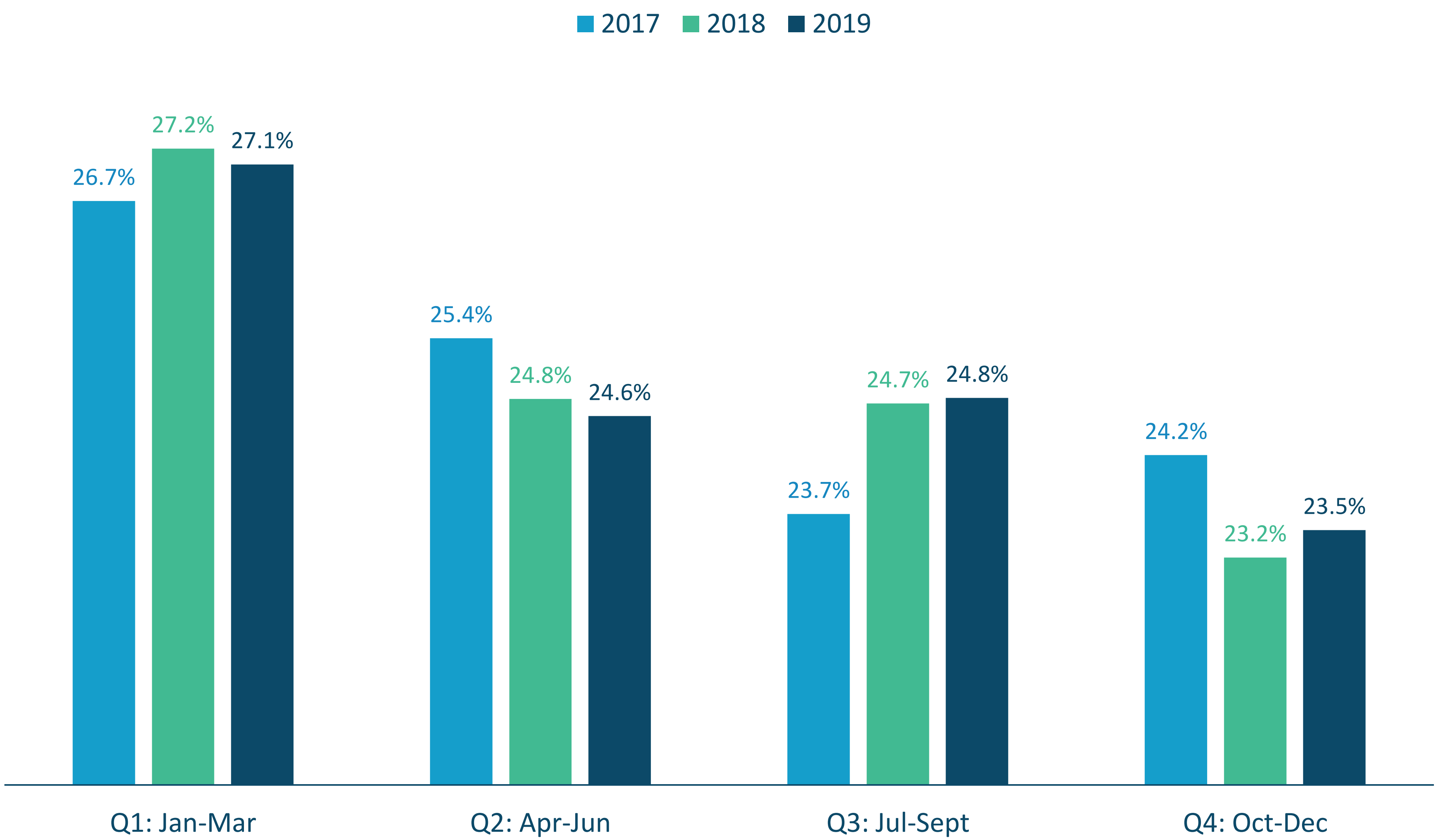
ANNUAL RATIO OF AIR AND NON-AIR VISITORS



Sources: TravelTrak America; D.K. Shifflet; Statistics Canada; X-Border Canada; U.S. Department of Commerce, ITA, Tourism Industries; Visa Travel Insights; Airline Data, Inc; ARC Global Agency Pro

VISITORS TO FLORIDA BY QUARTER

CALENDAR YEARS 2017-2019



Sources: TravelTrak America; D.K. Shifflet; Statistics Canada; X-Border Canada; U.S. Department of Commerce, ITA, Tourism Industries; Visa Travel Insights; Airline Data, Inc; ARC Global Agency Pro

ENPLANEMENTS

COMPARISON AT 19 FLORIDA AIRPORTS

There were 98.8 million enplanements at the 19 major airports in Florida in 2019, an increase of 4.6 million (+4.9%) compared to 2018. Orlando International Airport (MCO) was the busiest airport in the state, recording 25.2 million enplanements and accounting for 25.5% of all enplanements in the state.

All but one of the 19 airports saw an increase in enplanements in 2019. The largest numerical increase occurred at MCO, which saw nearly 1.4 million more enplanements in 2019 than it had the previous year. Sarasota had the largest proportional increase, with a year-over-year expansion of +42.4%. Several airports in North Florida saw notable growth in enplanements, including Panama City with +22.5% and Destin-Fort Walton Beach with +18.5%.

Airports along Florida's east coast experienced mostly tepid growth in 2019. Daytona saw its enplanement total drop by -6.6% compared to 2018, while Melbourne was nearly flat at +1.0%. Miami and Fort Lauderdale saw slightly faster growth, but neither grew by more than 2%.

AIRPORT	2018	2019	% CHANGE '19/'18
Daytona	382,979	357,683	-6.6%
Destin-Fort Walton Beach	704,716	834,879	18.5%
Fort Lauderdale	18,008,451	18,370,526	2.0%
Fort Myers	4,719,568	5,144,467	9.0%
Gainesville	239,188	279,847	17.0%
Jacksonville	3,233,880	3,596,953	11.2%
Key West	439,971	486,139	10.5%
Melbourne	237,535	239,944	1.0%
Miami	22,427,424	22,794,940	1.6%
Orlando International	23,811,824	25,200,582	5.8%
Orlando Sanford	1,531,881	1,628,181	6.3%
Palm Beach	3,263,054	3,447,307	5.6%
Panama City	518,858	635,852	22.5%
Pensacola	986,766	1,118,983	13.4%
Punta Gorda	786,911	824,466	4.8%
Sarasota	688,090	979,810	42.4%
St. Petersburg-Clearwater	1,113,952	1,141,723	2.5%
Tallahassee	403,929	431,454	6.8%
Tampa	10,639,059	11,254,683	5.8%
Total	**94,138,036**	**98,768,419**	**4.9%**

Source: Individual Airports

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

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 applies 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. 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. Estimates for 2018 are based on VISIT FLORIDA's analysis of historical trends and data from Statistics Canada and the Conference Board of Canada. Estimates for 2017 are provided by Statistics Canada.

PROFILE OF DOMESTIC VISITORS TO FLORIDA

Prepared by VISIT FLORIDA

Research Department

DOMESTIC VISITORS TO FLORIDA

Summary:

> The share of Florida's domestic visitors who traveled to the Sunshine state for leisure purposes increased relative to business travel in 2019, reaching 93% compared to 91% in 2018. The percentage who visited for a general vacation decreased from 45% to 44%, and those visiting for special events fell from 9% to 7%.

> Summer remained the most popular season for domestic travel to Florida, with 28% of visitors arriving between June and August. Spring has seen a decline in share of visitors, falling to 25% in 2019 from 26% in 2018. Fall saw a slight growth in share during the same period, increasing by a single percentage point to reach 21%.

> The average travel party size for domestic visitors was 2.1 in 2019. Travel parties consisting of one male and one female were the most common, accounting for 37% of all travel parties, followed by solo adult travelers at 35%. The percentage of travel parties consisting of families with children fell by 2 percentage points to 17% between 2018 and 2019.

> The average length of stay for domestic visitors to Florida was 4.2 nights in 2019, an average that has remained steady since 2017.

> The top activities for Florida's domestic visitors in 2019 were beach/waterfront activities (44%), visiting friends and relatives (34%), culinary/dining experiences (32%), shopping (29%), and visiting theme/amusement/water parks (17%).

> Florida's domestic visitors spent an average of $165.90 per person per day in 2019, an increase of 4% from the previous year. Excluding transportation costs, the average expenditure per person per day was $121.20 (+4% YoY). The average expenditure on lodging increased by 13% from the previous year to reach $67.30, while the average expenditure on transportation grew 5% to $44.70. Notable growth was seen in expenditures for lodging services (+23% YoY) and rental cars (+11% YoY).

> Domestic visitors to Florida in 2019 were more affluent on average than in 2018. The median annual household income for domestic visitors to Florida grew by 4.5% in 2019 compared to the previous year. The share of visitors with annual household incomes over $150,000 reached 26%, up from 23% in 2018.

- While Millennial and Gen Z visitors made up a larger share of Florida's domestic visitors in 2019, the average age remained steady at 49.3. The share of visitors between the ages of 35 and 49 fell by 4 percentage points, while the share of visitors in the 18 to 34 age range grew by 3 percentage points. Millennials (born between 1981 and 1997) accounted for 30% of all visitors, up from 28% the previous year. Boomers remained the largest generational cohort, accounting for 34% of all domestic visitors in 2019.
- Florida's domestic visitors were less likely to stay in paid accommodations in 2019, with the share of visitors doing so falling 4 percentage points to 69%. This was driven by a decline in the use of hotel paid accommodations, which fell to 41% in 2019 from 45% the year prior. For visitors who stayed in hotels, mid-level properties were the most popular with a 46% share of the total. The percentage of visitors who stayed in an economy-level property fell by two percentage points to 12% in 2019.
- Among top origin states, New York increased its dominant share of visitors by 1 percentage point to reach 10% while Georgia fell 1.2 percentage points to 9%. Texas (6%), Ohio (5%), and Pennsylvania (5%) rounded out the top 5. Florida's top origin DMAs were New York City (11%), Atlanta (6%), Chicago (4%), Philadelphia (3%), and Boston (3%). Atlanta saw a notable decline in its share of visitors with a decline of 2.5 percentage points from the previous year, while Raleigh-Durham saw robust growth of 1.2 percentage points but remained outside of the top 5.

DOMESTIC VISITORS

PRIMARY PURPOSE OF TRIP

Florida's domestic visitors were more likely to travel for leisure in 2019 than the previous year, with general vacations (44%) being the most common reason for visiting the Sunshine State. The second most common trip purpose was visiting friends and/or relatives (25%), which saw a 2 percentage point increase in share compared to the previous year. The share of visitors who came to Florida on business fell to a low of 7% in 2019 from a high of 19% in 2006, a trend that reflects the more rapid and robust long-term growth in leisure travel relative to business travel.

	2017	2018	2019	Change '19/'18
Leisure	**89%**	**91%**	**93%**	▲
General Vacation	39%	45%	44%	—
Visit Friends/Relatives	24%	23%	25%	▲
Getaway Weekend	9%	10%	10%	—
Special Event	9%	7%	7%	—
Other Leisure/Personal	8%	6%	7%	—
Business	**11%**	**9%**	**7%**	▼
Transient Business	4%	4%	3%	—
Convention	3%	2%	2%	—
Seminar/Training	2%	2%	1%	—
Other Group Meetings	2%	2%	1%	—

TRANSPORTATION TYPE

	2017	2018	2019	Change '19/'18
Air	35.9%	34.1%	35.0%	—
Non-Air	64.1%	65.9%	65.0%	—

SEASONALITY

More domestic visitors traveled to Florida in Summer than in any other season in 2019, accounting for 28% of the total. By contrast, the share of visitors who arrived in Spring continued a 4-year trend of decline, falling to 25% and allowing Winter to surpass it as the second busiest season.

	2017	2018	2019	Change '19/'18
Winter (Dec, Jan, Feb)	25%	26%	26%	—
Spring (Mar, Apr, May)	27%	26%	25%	—
Summer (Jun, Jul, Aug)	28%	28%	28%	—
Fall (Sept, Oct, Nov)	20%	20%	21%	—

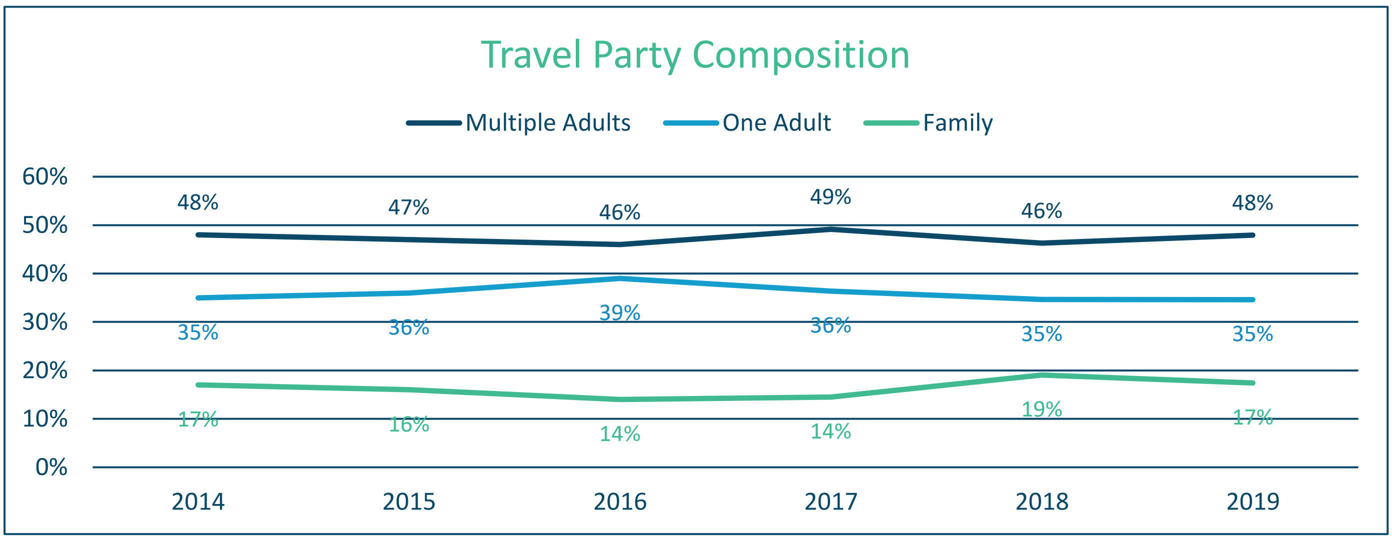
Sources: D.K. Shifflet, VISIT FLORIDA; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS (CONTINUED)

TRAVEL PARTY COMPOSITION

The average party size expanded after 2017, partially the result of an increase in families among domestic travel parties, which rose from 14% in 2017 to 17% in 2019.

	2017	2018	2019	Change '19/'18
One Male and One Female	38%	35%	37%	▲
One Adult	36%	35%	35%	—
Families	14%	19%	17%	▼
Three or More Adults	7%	6%	6%	—
Two Males or Two Females	5%	5%	5%	—
Average Party Size	**2.0**	**2.1**	**2.1**	—



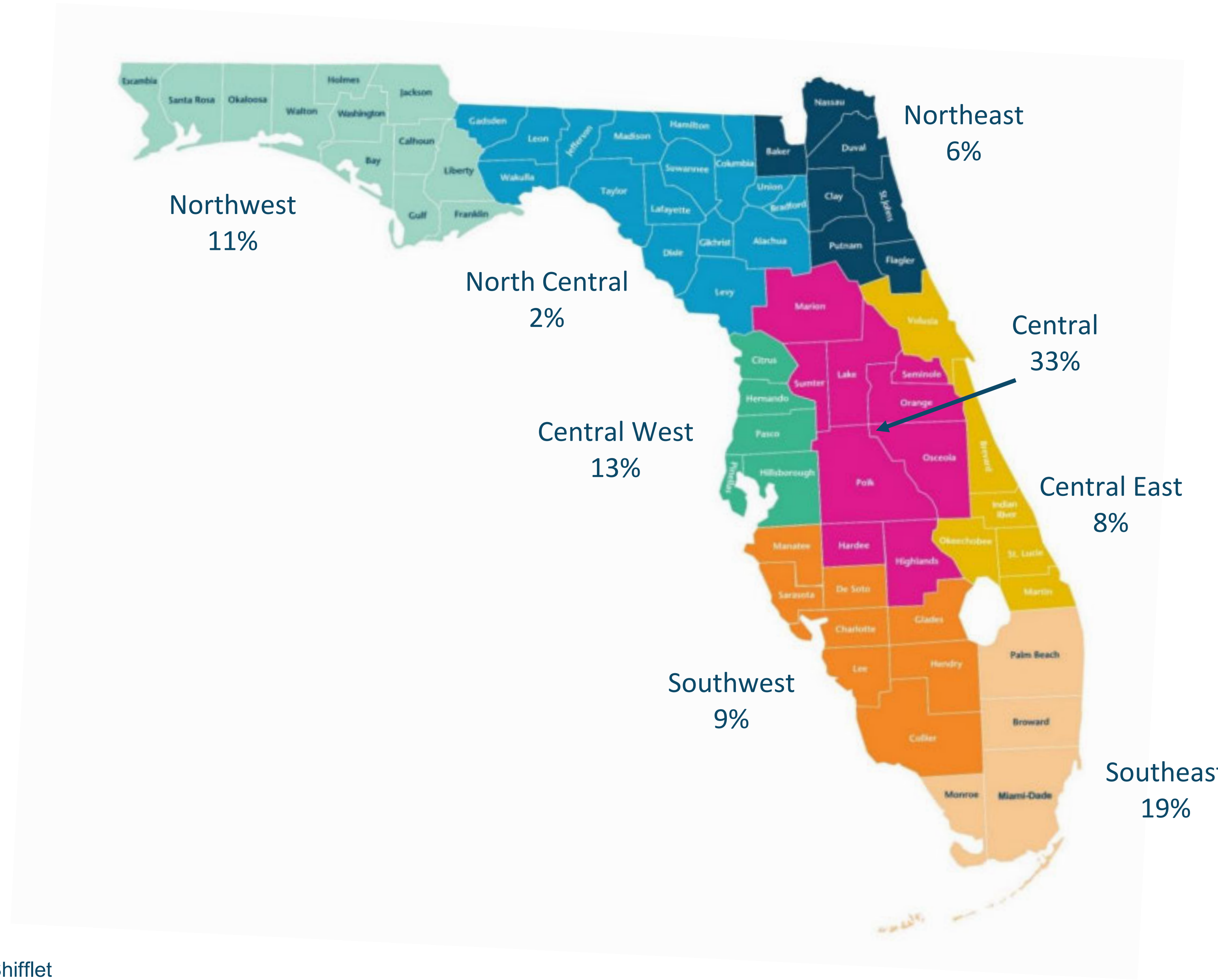
FLORIDA DESTINATION REGIONS

	2017	2018	2019	Change '19/'18
Central	35%	34%	33%	—
Southeast	17%	18%	19%	—
Central West	12%	12%	13%	—
Northwest	11%	12%	11%	—
Southwest	9%	8%	9%	—
Central East	8%	9%	8%	—
Northeast	7%	7%	6%	—
North Central	1%	1%	2%	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS (CONTINUED)

FLORIDA DESTINATION REGIONS



Source: D.K. Shifflet

DOMESTIC VISITORS (CONTINUED)

TOP ORIGIN STATES

Rank	State	2017	2018	2019	Change '19/'18
1	New York	8.5%	8.9%	10.0%	▲
2	Georgia	9.6%	10.6%	9.4%	▼
3	Texas	5.5%	4.3%	5.6%	▲
4	Ohio	5.3%	4.3%	5.4%	▲
5	Pennsylvania	5.3%	5.1%	5.1%	—
6	North Carolina	3.9%	4.7%	5.0%	—
7	New Jersey	4.3%	4.2%	4.3%	—
8	Tennessee	4.5%	4.1%	4.2%	—
9	Illinois	3.7%	4.9%	4.1%	▼
10	Michigan	3.4%	3.8%	3.8%	—
11	Indiana	2.8%	3.2%	3.4%	—
12	Alabama	3.5%	4.8%	3.3%	▼
13	California	2.9%	4.0%	3.0%	▼
14	Massachusetts	2.8%	2.8%	3.0%	—
15	Maryland	3.3%	2.5%	2.9%	—

TOP ORIGIN DESIGNATED MARKET AREAS (DMAs)

Rank	DMA	2017	2018	2019	Change '19/'18
1	New York, NY	10.0%	9.4%	11.1%	▲
2	Atlanta, GA	6.8%	8.6%	6.2%	▼
3	Chicago, IL	3.4%	3.6%	3.7%	—
4	Philadelphia, PA	4.2%	3.7%	3.5%	—
5	Boston, MA	3.1%	2.5%	3.3%	▲
6	Washington, DC	3.0%	2.9%	2.8%	—
7	Raleigh-Durham, NC	1.1%	1.0%	2.2%	▲
8	Detroit, MI	2.1%	1.9%	2.0%	—
9	Cleveland-Akron, OH	1.5%	1.0%	1.8%	▲
10	Nashville, TN	2.5%	2.7%	1.8%	▼
11	Dallas-Fort Worth, TX	1.3%	2.1%	1.7%	—
12	Houston, TX	2.6%	1.1%	1.7%	▲
13	Indianapolis, IN	1.8%	1.3%	1.7%	—
14	Cincinnati, OH	0.8%	1.3%	1.5%	—
15	Charlotte, NC	1.4%	1.4%	1.4%	—

Source: D.K. Shifflet; Arrows indicate change of at least 0.5 percentage points

DOMESTIC VISITORS (CONTINUED)

ACTIVITIES DURING TRIP

Going to the beach/waterfront was the most popular activity among Florida's domestic visitors in 2019. The percentage who visited friends and/or relatives in Florida grew by 4 percentage points from 2018 to 34% in 2019, overtaking culinary/dining experiences in popularity. Shopping experienced a notable decline between 2015 and 2019, falling from 32% participation to 29%.

Activity (Multiple Response)	2017	2018	2019	Change '19/'18
Beach/Waterfront	43%	43%	44%	—
Visit Friends/Relatives	31%	30%	34%	▲
Culinary/Dining Experience	33%	31%	32%	—
Shopping	29%	30%	29%	—
Theme/Amusement/Water Parks	14%	16%	17%	—
Touring/Sightseeing	16%	15%	16%	—
Nightlife (bar, nightclub, etc.)	14%	13%	14%	—
Parks (national, state, etc.)	11%	11%	12%	—
Live Music (festivals/concerts/clubs)	8%	9%	9%	—
Historic Sites	10%	8%	8%	—
Personal Celebration (anniversary, etc.)	6%	7%	7%	—
Movies	7%	8%	7%	—
Wildlife Viewing (birds, whales, etc.)	6%	7%	7%	—
Museum, Art Exhibits, etc.	6%	6%	6%	—
Festival/Fairs (state, craft, etc.)	5%	7%	6%	—
Holiday Celebrations (Thanksgiving, etc.)	4%	6%	5%	—
Zoo/Aquarium	5%	5%	5%	—
Business/Work	5%	4%	5%	—
Golfing	4%	4%	4%	—
Water Sports	5%	3%	4%	—
Boating/Sailing	4%	5%	4%	—
Fishing	4%	5%	4%	—
Show: Boat, Car, Home	3%	4%	3%	—
Gambling (slots, cards, horses, etc.)	3%	3%	3%	—
Theater/Dance Performance	2%	2%	3%	—
Professional Sports Event	2%	3%	3%	—
Bicycling	3%	3%	3%	—
Amateur Sports (attend/participate)	3%	2%	3%	—
Hiking	3%	3%	3%	—
Spa	2%	2%	3%	—
Winery/Distillery/Brewery Tours	1%	2%	2%	—

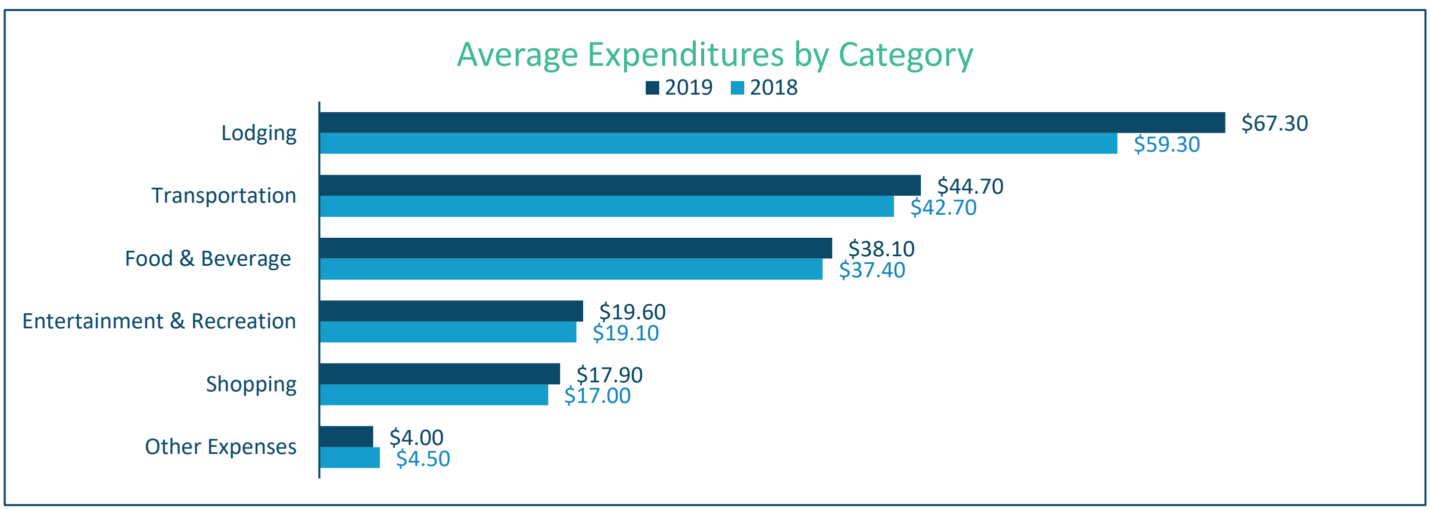
Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS (CONTINUED)

AVERAGE EXPENDITURES PER PERSON PER DAY

Florida's domestic visitors spent 4% more per person per day in 2019 than the pervious year, surpassing the 5-year average of 1% while also outpacing the growth of the Consumer Price Index (CPI).[1] Much of this growth was driven by an increase in lodging expenditures, as demand shifted toward mid-level and higher-end accommodations. The average shopping exependiture grew for the first time in 6 years, though it remained 11% lower than in 2014. A healthy economy and high consumer confidence helped to drive growth in average shopping expenditures as well as average domestic visitor expenitures overall.

	2017	2018	2019	Change '19/'18
Avg. Expenditures (incl. transportation)	**$158.90**	**$159.60**	**$165.90**	**4%**
Avg. Expenditures (excl. transportation)	**$116.50**	**$116.80**	**$121.20**	**4%**
Lodging - Total	$57.90	$59.30	$67.30	13%
Lodging - Room	*$69.20*	*$71.20*	*$78.10*	*10%*
Lodging - Services (internet, parking, etc.)	*$6.60*	*$9.70*	*$11.90*	*23%*
Transportation - Total	$42.40	$42.70	$44.70	5%
Transportation - Total (excluding airfare)	*$22.60*	*$23.70*	*$22.50*	*-5%*
Transportation - Airfare	*$54.90*	*$53.00*	*$56.50*	*7%*
Transportation - Rental Car	*$35.90*	*$34.70*	*$38.50*	*11%*
Transportation - Other (taxi, bus , gas, etc.)	*$13.00*	*$13.80*	*$12.20*	*-12%*
Food & Beverage	$36.80	$37.40	$38.10	2%
Entertainment & Recreation	$18.50	$19.10	$19.60	3%
Shopping	$18.30	$17.00	$17.90	5%
Other Expenses	$4.40	$4.50	$4.00	-11%



[1] December 2019 12-month percentage change in CPI was 2.3%. Source: U.S. Bureau of Labor Statistics.

Source: D.K. Shifflet

DOMESTIC VISITORS (CONTINUED)

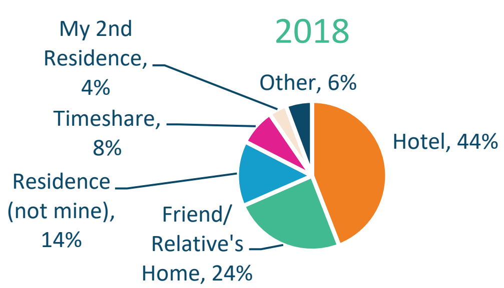
PAID VS. NON-PAID ACCOMMODATIONS

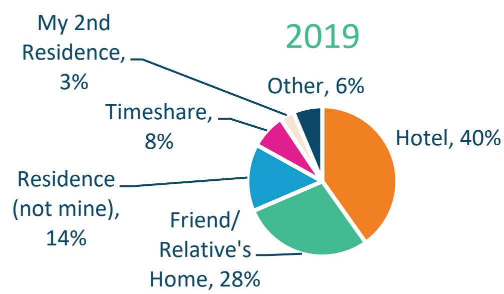
The percentage of domestic visitors staying in paid accommodations fell by 4 percentage points to 69% in 2019, driven by a decline in visitors staying in hotels. Visitors were more likely to stay in a friend or relative's home in 2019 compared to the previous year, driving the share of visitors staying in non-paid accommodations to its highest point since 2015.

	2017	2018	2019	Change '19/'18
Paid	**72%**	**73%**	**69%**	▼
Hotel Paid	*46%*	*45%*	*41%*	▼
Non-Hotel Paid	*26%*	*28%*	*29%*	—
Non-Paid	**28%**	**27%**	**31%**	▲

ACCOMMODATION TYPE

Hotels lost 4 percentage points of market share to the homes of friends and relatives.





HOTEL LEVEL

Among domestic visitors who stayed in hotels, nearly half (46%) stayed at a mid-level property in 2019. The share of visitors staying in high-end hotels grew by 3 percentage points between 2017 and 2019, while economy hotels lost 2 percentage points over the same period.

	2017	2018	2019	Change '19/'18
High End	**39%**	**41%**	**42%**	—
Luxury	9%	10%	11%	—
Upscale	30%	31%	31%	—
Mid-Level	**47%**	**45%**	**46%**	—
Upper Moderate	17%	16%	18%	▲
Moderate	30%	29%	28%	—
Economy	**14%**	**14%**	**12%**	▼
Lower Moderate	7%	7%	7%	—
Budget	7%	6%	5%	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS (CONTINUED)

LENGTH OF STAY

The average length of stay for domestic visitors in 2019 remained constant from the previous year at 4.2 nights, though the percentage staying 8 or more nights fell 1 percentage point to 8%. The share of domestic visitors staying 4-7 nights increased by 1 percentage point to 41%, while the 51% majority who had brief stays of 1-3 nights remained unchanged.

	2017	2018	2019	Change '19/'18
1-3 nights	51%	51%	51%	—
4-7 nights	40%	40%	41%	—
8+ nights	8%	9%	8%	—
Average Nights in Florida	**4.2**	**4.2**	**4.2**	—
Median Nights in Florida	**2.6**	**2.7**	**2.7**	—

ACCOMMODATION RESERVATION TYPE

Nearly half (48%) of Florida visitors reserved their accommodations online in 2019. Aside from online methods, calling directly was the second most popular way to place a reservation (18%). Sixteen percent of domestic visitors had their accommodations included as part of a package, an increase from 14% in 2017.

	2017	2018	2019	Change '19/'18
Made Reservation	**92%**	**93%**	**93%**	—
Online	45%	50%	48%	▼
Hotel Chain Website	*27%*	*28%*	*27%*	—
Travel Website	*15%*	*12%*	*12%*	—
Non Hotel Accommodations site/app	-	*6%*	*5%*	—
Hotel Mobile App	*3%*	*4%*	*3%*	—
Other Website	*0%*	*0%*	*1%*	—
Called Directly	18%	18%	18%	—
As Part of a Package	14%	15%	16%	—
Travel Agent	3%	3%	2%	—
Other	12%	8%	8%	—
No Reservation	**8%**	**7%**	**7%**	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS (CONTINUED)

TRIP PLANNING TIME FRAME

The percentage of domestic visitors who planned their Florida trip two months or more in advance was 57% in 2019, up from 55% two years earlier. However, the share of visitors planning their trip more than 6 months in advance saw a slight drop of 1 percentage point to 11%. The briefest time frames, those of a week or less, receded from 12% in 2018 to 10% in 2019.

	2017	2018	2019	Change '19/'18
1 Week or Less	15%	12%	10%	▼
2-3 Weeks	15%	13%	15%	▲
1 Month	16%	18%	18%	—
2-3 Months	27%	28%	29%	—
4-5 Months	10%	10%	9%	—
6 Months	7%	7%	7%	—
More Than 6 Months	11%	12%	11%	—

TRIP PLANNING RESOURCES USED

Among Florida's domestic visitors, past experience was the most common resource used for trip planning in 2019. Recommendations from friends and family were the second most common, with more than 1 in 5 visitors reporting that they had turned to loved ones for travel advice. A substanitally higher percentage of visitors used hotel chain websites in 2019 than in the previous year, in line with a long-term upward trend in the useage of online resources. While the top two resources used in 2019 were personal in nature, the remaing eight of the top ten were online.

	2017	2018	2019	Change '19/'18
Used Resource	**78%**	**77%**	**78%**	—
Past Experience	34%	33%	34%	—
Friend/Family Recommendation	21%	17%	21%	▲
Internet Search (Bing, Google, etc.)	17%	16%	18%	▲
Hotel Chain Websites	15%	13%	17%	▲
Destination Websites	8%	9%	10%	—
Review Websites (TripAdvisor, Yelp!, etc.)	9%	7%	9%	▲
Travel Booking Website (Expedia, etc.)	8%	7%	9%	▲
Attraction Websites	10%	9%	9%	—
Mapping Websites (Google Maps, etc.)	9%	6%	8%	▲
Destination Visitor Guides - Online	6%	4%	5%	—
No Resource Used	**22%**	**23%**	**22%**	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS (CONTINUED)

AGE OF ADULT TRAVELERS

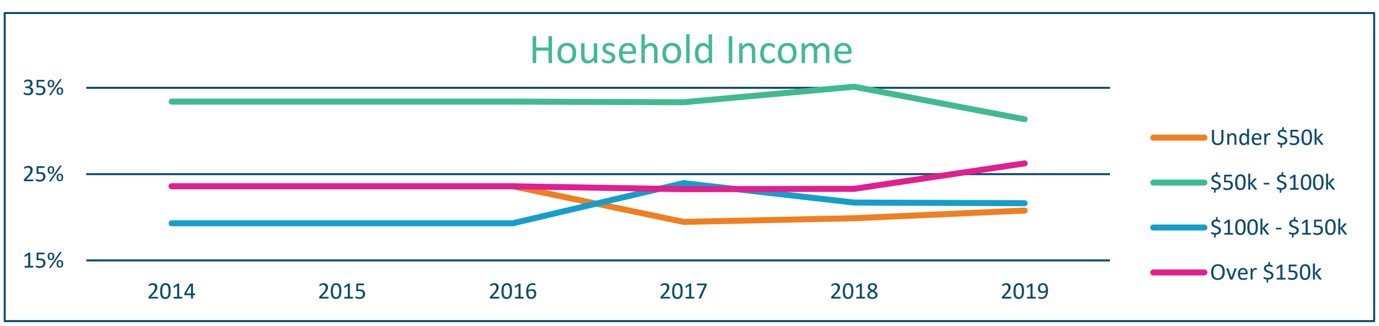
Florida's Domestic visitors were more likely to fall into the 18-34 year old age group in 2019 than in any year since 2015. An increase in the share of visitors over 50 balanced out the growth in those under 35 to keep the average age flat from the previous year at 49.3.

	2017	2018	2019	Change '19/'18
18 - 34 Years Old	23%	21%	24%	▲
35 - 49 Years Old	28%	32%	28%	▼
50 - 64 Years Old	27%	27%	28%	—
65+ Years Old	21%	20%	21%	—
Average Age	**49.1**	**49.3**	**49.3**	—
Median Age	**46**	**48**	**48**	—

HOUSEHOLD INCOME

The annual median household income of domestic travelers grew by 4.5% in 2019 to reach $96,761. The share of visitors with household incomes over $150,000 increased by 7 percentage points since 2015 to reach 26%, while the share of those with household incomes under $50,000 fell by 8 percentage points to 21% over the same period.

	2017	2018	2019	Change '19/'18
Under $35,000	11%	11%	11%	—
$35,000 - $49,999	8%	9%	9%	—
$50,000 - $74,999	18%	18%	15%	▼
$75,000 - $99,999	16%	17%	16%	—
$100,000 - $149,999	24%	22%	22%	—
$150,000 - $199,999	12%	15%	16%	—
$200,000+	12%	8%	10%	▲
Average	**$117,231**	**$112,183**	**$116,419**	4%
Median	**$95,456**	**$92,603**	**$96,761**	4%



Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS (CONTINUED)

GENERATION

Florida's domestic visitors were more likely to belong to the Millennial and Gen Z cohorts in 2019; their share increased by 4 percentage points since 2015. By contrast, the share of visitors who are Boomers - the largest generational cohort - has declined by 3 percentage points since 2017 to 34%. However, there was no significant decrease in the average age of domestic visitors.

	2017	2018	2019	Change '19/'18
Millennials/Gen Z (1981 to 1997)	27%	28%	30%	▲
GenX (1965-1980)	31%	31%	30%	—
Boomers (1946 -1964)	37%	35%	34%	—
Silent/GI (1945 or earlier)	6%	6%	5%	—

LIFESTAGE

The share of adult domestic visitors with children in the household declined by 4 percentage points overall to 34%, while adults without children increased their share by 4 percentage points to reach 66%. Affluent Families and Moderate Matures were the largest individual groups in 2018 and 2019, but lost a combined 3 percentage points while Young & Free, Maturing & Free, and Affluent Mature travelers increased their shares to account for a combined 48% of visitors.

	2017	2018	2019	Change '19/'18
Young & Free (18-34; any income; no kids)	13%	12%	15%	▲
Young Family (18-34; any income; kids in HH)	11%	11%	10%	—
Maturing & Free (35-54; any income; no kids)	16%	13%	15%	▲
Moderate Family (35-54; <$75K; kids in HH)	6%	8%	5%	▼
Affluent Family (35-54; $75K+; kids in HH)	16%	19%	18%	—
Moderate Mature (55 or older, <$100K; no kids)	21%	20%	18%	▼
Affluent Mature (55 or older; $100K+, no kids)	17%	17%	18%	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

PROFILE OF DOMESTIC VISITORS TO FLORIDA TRAVELING BY AIR

Prepared by VISIT FLORIDA

Research Department

DOMESTIC VISITORS TO FLORIDA TRAVELING BY AIR

Summary:

> The Domestic visitors were more likely to travel to Florida by air in 2019 than in the previous year. Domestic air visitors accounted for 35% of domestic visitors to Florida in 2019, up from 34% in 2018.

> The share of domestic air visitors to Florida traveling for leisure was 86% in 2019, similar to the previous year. Among the top leisure purposes of travel, general vacations held the largest share at 39%, though it lost ground to visiting friends and/or relatives between 2018 and 2019 (25% of domestic air visitors, +4 percentage points).

> Winter travel has seen a consistent increase in popularity among domestic air visitors over the past 2 years, increasing from a 24% share of visitors in 2017 to 29% in 2019. Meanwhile, Fall travel has seen a decline in visitor share, partly reflecting the impact of successive years of pronounced hurricane activity and related disruptions on travel.

> Average party size has grown as Florida's domestic air visitors have shifted away from solo travel and toward family travel in recent years. Solo adult travel parties accounted for 43% of the total in 2019, down from 47% in 2017. The share of travel parties consisting of families with children grew from 12% to 17% during the same 2-year period. As a result, average party size for domestic air visitors has reached 2.0 people.

> The top activities for domestic air visitors while in Florida in 2019 were beach/waterfront activities (41%), a culinary/dining experience (35%), visiting friends and relatives (33%), shopping (30%), and visiting theme/amusement/water parks (19%).

> The average expenditure per person per day for domestic air visitors was $199.91 in 2019, a 2% decrease from 2018. This was driven by declines in several expenditure categories, including entertainment and recreation (-11%), shopping (-5%), and food and beverage (-3%).

> Florida's domestic air visitors stayed an average of 4.5 nights in the state in 2019, a slight increase from 4.4 nights the previous year. The increase was driven by a decline in short stays of 1-3 nights (41% of domestic air visitors, -5 percentage

points) and a significant increase in stays of 4-7 nights (51% of domestic air visitors, +6 percentage points).

> The median annual household income of domestic air visitors was higher by 7% in 2019 than the year prior, while average age declined to 48.3. Median household income was $122,271, with the most significant growth in visitor share seen in households earning $200,000 or more. The lower average age was driven by an increase in the share of Millennial visitors, which grew by 4 percentage points to reach 30% in 2019.

> The top origin states for domestic air visitors in 2019 were New York (15%), Ohio (8%), Texas (6%), New Jersey (5 %), and Illinois (5%).

> The top origin DMAs for domestic air visitors were New York, NY (16%), Boston, MA (5%), and Chicago, IL (5%).

> The percentage of Florida's domestic air visitors who stayed in paid accommodations fell by 3 percentage points to 72% between 2017 and 2019. During this period, there was a notable shift away from hotels toward non-hotel paid and non-paid accommodations. Among domestic air visitors who did stay in hotel in 2019, more than half (55%) stayed at a high-end property.

DOMESTIC VISITORS BY AIR

PRIMARY PURPOSE OF TRIP

The percentage of domestic air visitors traveling to Florida for leisure climbed by 4 percentage points to 86% in 2018, and remained there in 2019. A smaller share of these visitors came to Florida for a general vacation in 2019 (39%), while those visiting friends/relatives increased by 4 percentage points to reach 25% of the total.

	2017	2018	2019	Change '19/'18
Leisure	**81%**	**85%**	**85%**	—
General Vacation	39%	43%	39%	▼
Visit Friends/Relatives	22%	21%	25%	▲
Getaway Weekend	9%	10%	9%	—
Special Event	8%	7%	8%	—
Other Leisure/Personal	3%	4%	4%	—
Business	**17%**	**14%**	**15%**	—
Transient Business	5%	5%	5%	—
Convention	6%	4%	4%	—
Seminar/Training	3%	3%	3%	—
Other Group Meetings	3%	2%	3%	—

SEASONALITY

More domestic visitors traveled to Florida in Summer than in any other season in 2019, accounting for 28% of the total. By contrast, the share of visitors who arrived in Spring continued a 4-year trend of decline, falling to 25% and allowing Winter to surpass it as the second busiest season.

	2017	2018	2019	Change '19/'18
Winter (Dec, Jan, Feb)	25%	26%	26%	—
Spring (Mar, Apr, May)	27%	26%	25%	—
Summer (Jun, Jul, Aug)	28%	28%	28%	—
Fall (Sept, Oct, Nov)	20%	20%	21%	—

LENGTH OF STAY

	2017	2018	2019	Change '19/'18
1-3 nights	44%	46%	41%	▼
4-7 nights	48%	45%	51%	▲
8+ nights	8%	9%	8%	—
Average Nights in Florida	**4.3**	**4.4**	**4.5**	▲
Median Nights in Florida	**3.0**	**2.9**	**3.3**	▲

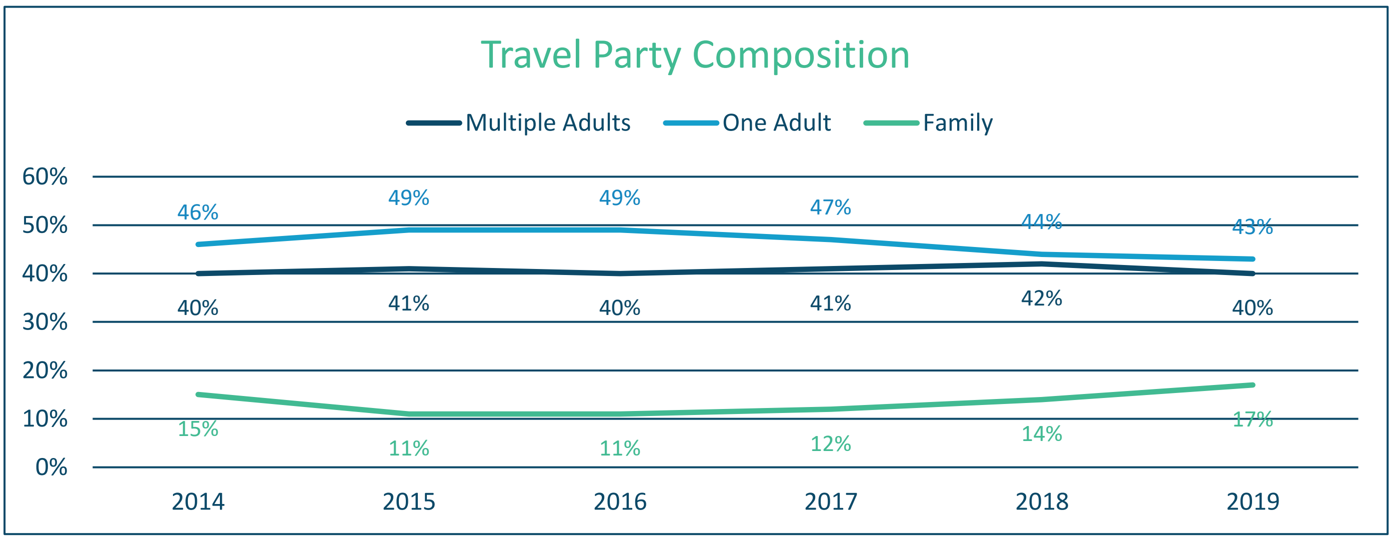
Sources: D.K. Shifflet, VISIT FLORIDA; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS BY AIR (CONTINUED)

TRAVEL PARTY COMPOSITION

The average size of a domestic air travel party reached 2.0 persons in 2019, the highest since 2011.

	2017	2018	2019	Change '19/'18
One Adult	47%	44%	43%	—
One Male and One Female	30%	30%	29%	—
Families	12%	14%	17%	▲
Three or More Adults	5%	6%	6%	—
Two Males or Two Females	6%	6%	5%	—
Average Party Size	**1.8**	**1.9**	**2.0**	▲



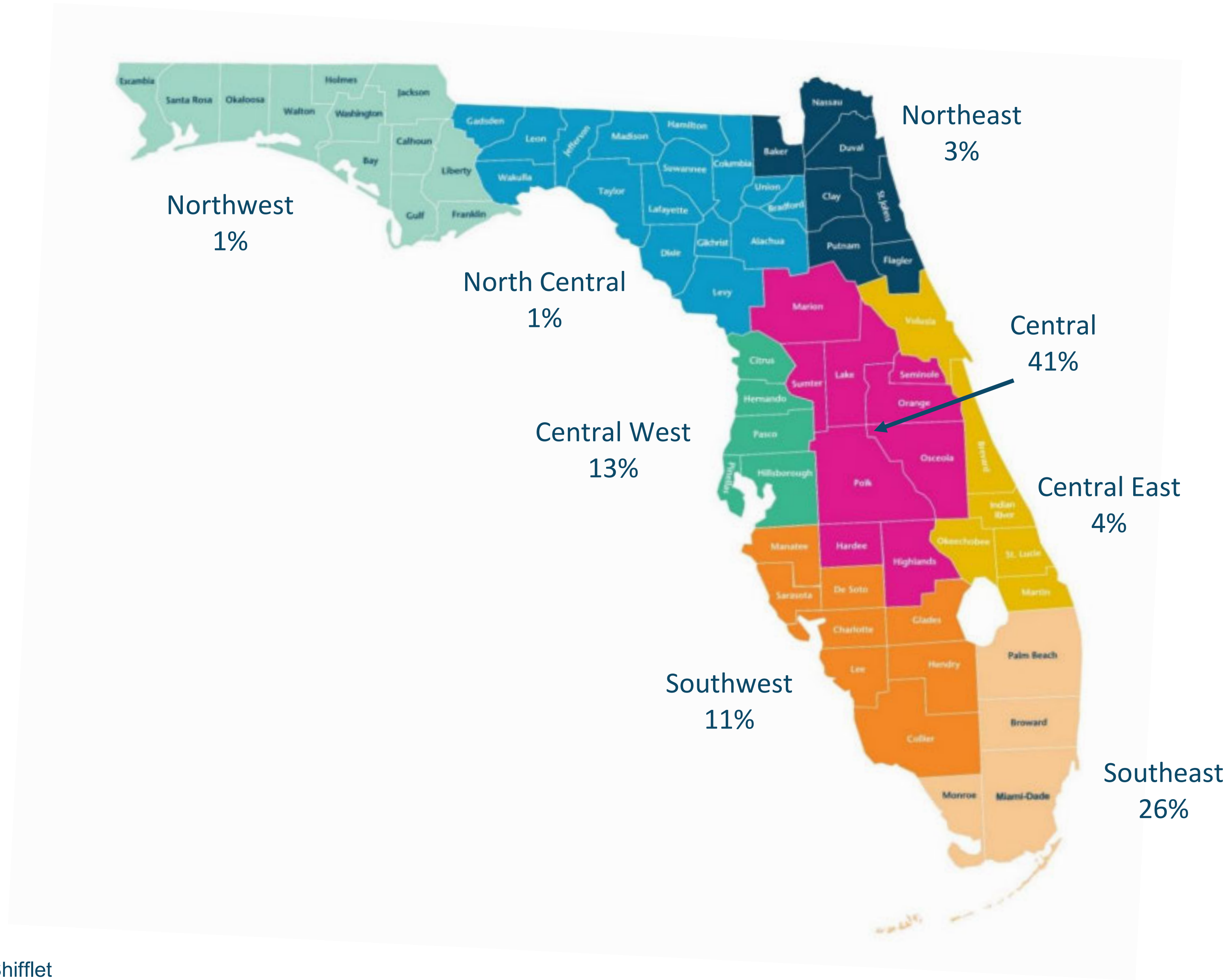
FLORIDA DESTINATION REGIONS

	2017	2018	2019	Change '19/'18
Central	43%	41%	42%	—
Southeast	24%	26%	22%	▼
Central West	13%	13%	14%	—
Southwest	9%	11%	10%	—
Central East	4%	4%	6%	▲
Northeast	4%	3%	4%	—
Northwest	2%	1%	2%	—
North Central	1%	1%	1%	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS BY AIR (CONTINUED)

FLORIDA DESTINATION REGIONS



Source: D.K. Shifflet

DOMESTIC VISITORS BY AIR (CONTINUED)

TOP ORIGIN STATES

New York was the top origin state for domestic air visitors in 2019, accounting for 14.5% of the total. Ohio rose from being the eighth-ranked origin state in 2018 to become the second-ranked state in 2019. Texas grew its share of visitors by 1.3 percentage points over the previous year, while Illinois and Pennsylvania saw significant declines.

Rank	State	2017	2018	2019	Change '19/'18
1	New York	13.7%	13.7%	14.5%	▲
2	Ohio	5.2%	4.2%	7.6%	▲
3	Texas	5.8%	4.4%	5.7%	▲
4	New Jersey	5.0%	5.7%	5.0%	▼
5	Illinois	6.3%	6.3%	4.9%	▼
6	Pennsylvania	7.6%	6.2%	4.7%	▼
7	Massachusetts	3.8%	5.1%	4.6%	▼
8	Maryland	3.8%	3.0%	4.5%	▲
9	California	3.9%	6.2%	4.5%	▼
10	Michigan	4.1%	4.0%	4.1%	—

TOP ORIGIN DESIGNATED MARKET AREAS (DMAs)

New York City remained the top origin DMA between 2017 and 2019. The Big Apple saw its share of visitors increase from 14.7% to 15.8% during the period, while Boston and Los Angeles also saw notable growth. Chicago fell from second to third place among origin DMAs in 2019 as its share of visitors fell to 5.2% from 6.0% in 2018.

Rank	DMA	2017	2018	2019	Change '19/'18
1	New York, NY	14.7%	15.0%	15.8%	▲
2	Boston, MA	4.4%	4.8%	5.3%	▲
3	Chicago, IL	6.1%	6.0%	5.2%	▼
4	Philadelphia, PA	4.9%	5.0%	4.5%	▼
5	Washington, DC	3.8%	3.4%	3.5%	—
6	Los Angeles, CA	2.1%	2.5%	2.9%	—
7	Atlanta, GA	3.2%	2.3%	2.4%	—
8	Detroit, MI	2.0%	2.3%	2.3%	—
9	Baltimore, MD	2.2%	2.3%	2.3%	—
10	Hartford & New Haven, CT	2.0%	2.3%	2.3%	—

Source: D.K. Shifflet; Arrows indicate change of at least 0.5 percentage points

DOMESTIC VISITORS BY AIR (CONTINUED)

ACTIVITIES DURING TRIP

Going to the beach/waterfront was the most popular activity among Florida's domestic air visitors in 2019. The percentage who visited friends and/or relatives in Florida grew by 4 percentage points from 2018 to 34% in 2019, overtaking culinary/dining experiences in popularity. Shopping experienced a notable decline between 2015 and 2019, falling from 32% participation to 29%.

Activity (Multiple Response)	2017	2018	2019	Change '19/'18
Beach/Waterfront	40%	40%	41%	—
Culinary/Dining Experience	36%	33%	35%	▲
Visit Friends/Relatives	29%	29%	33%	▲
Shopping	27%	28%	30%	▲
Theme/Amusement/Water Parks	18%	18%	19%	—
Nightlife (bar, nightclub, etc.)	14%	16%	19%	▲
Touring/Sightseeing	16%	13%	16%	▲
Parks (national/state, etc.)	10%	10%	10%	—
Live Music	9%	9%	9%	—
Personal Celebration (anniversary, etc.)	8%	6%	7%	—
Movies	7%	7%	7%	—
Business/Work	7%	6%	7%	—
Historic Sites	7%	5%	6%	—
Wildlife Viewing	6%	6%	6%	—
Festivals/Fairs (state, craft, etc.)	5%	4%	6%	▲
Museums, Art Exhibits, etc.	5%	5%	5%	—
Zoo/Aquarium	6%	4%	4%	—
Holiday Celebration	4%	5%	4%	—
Boating/Sailing	4%	5%	4%	—
Water Sports	4%	4%	4%	—
Golfing	4%	4%	4%	—
Show: Boat, Car, Home	3%	3%	4%	—
Gambling (slots, cards, horses, etc.)	3%	3%	3%	—
Spa	3%	3%	3%	—
Biking	3%	3%	3%	—
Amateur Sports (attend/participate)	2%	3%	3%	—
Professional Sports Event	2%	4%	3%	—
Theater/Dance/Performance	2%	2%	3%	—
Fishing	3%	3%	2%	—
Wedding	2%	2%	2%	—
Religious/Faith Based Conference	2%	2%	2%	—

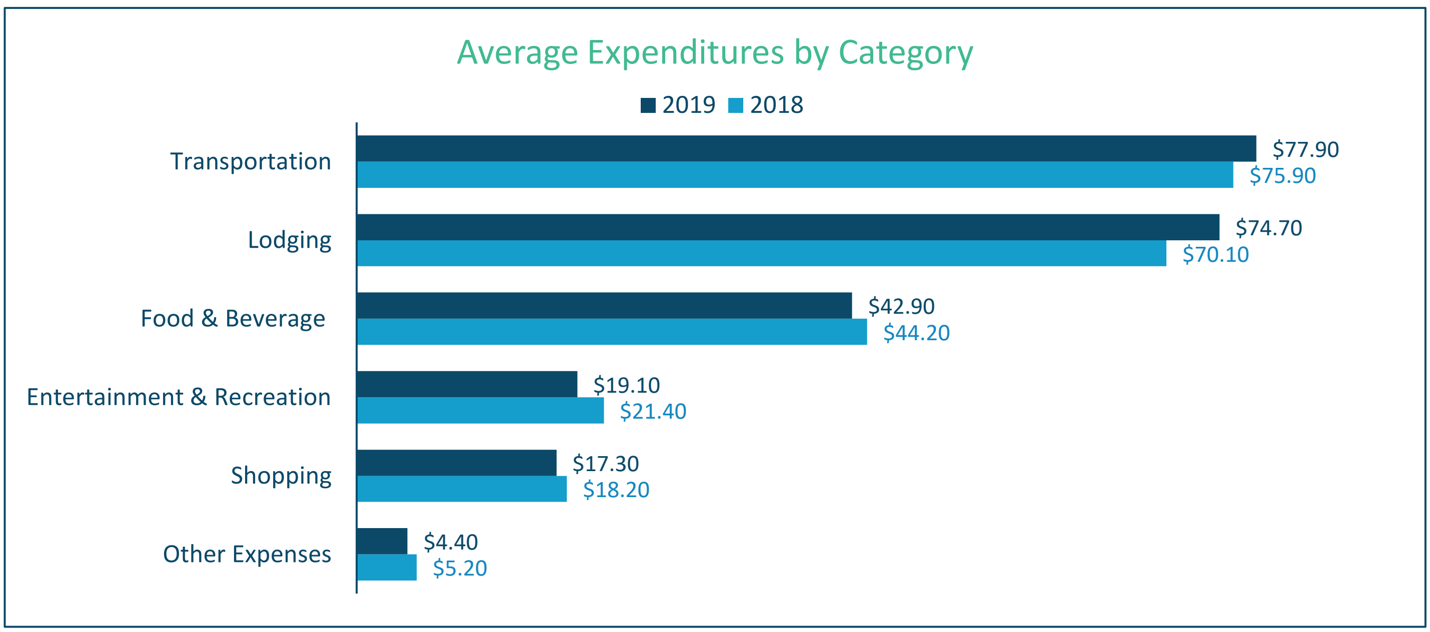
Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS BY AIR (CONTINUED)

AVERAGE EXPENDITURES PER PERSON PER DAY

The average expenditure (including transporation) of domestic air visitors fell by 2% to $204.60 in 2019. The decline was evident in a reduction in expenditures on food & beverage (-3%), entertainment & recreastion (-11%), and shopping (-5%). The two largest expenditure categories, transporation and lodging, both increased over the previous year.

	2017	2018	2019	Change '19/'18
Avg. Expenditures (incl. transportation)	**$205.30**	**$207.90**	**$204.60**	**-2%**
Avg. Expenditures (excl. transportation)	**$127.30**	**$132.00**	**$126.70**	**-4%**
Transportation - Total	$77.90	$75.90	$77.90	3%
Transportation - Total (excl. airfare)	*$23.30*	*$22.90*	*$22.90*	*0%*
Transportation - Airfare	*$59.80*	*$57.70*	*$60.00*	*4%*
Transportation - Rental Car	$35.70	$35.10	$38.70	10%
Transportation - Other (taxi, gas, etc.)	*$6.90*	*$7.30*	*$6.70*	*-8%*
Lodging - Total	*$64.70*	*$70.10*	*$74.70*	*7%*
Lodging - Room	*$77.40*	*$83.80*	*$91.00*	*9%*
Lodging - Services (internet, parking, etc.)	*$10.30*	*$12.80*	*$14.50*	*13%*
Food & Beverage	$41.60	$44.20	$42.90	-3%
Entertainment & Recreation	$21.40	$21.40	$19.10	-11%
Shopping	$17.90	$18.20	$17.30	-5%
Other Expenses	$5.20	$5.20	$4.40	-15%



Source: D.K. Shifflet

DOMESTIC VISITORS BY AIR (CONTINUED)

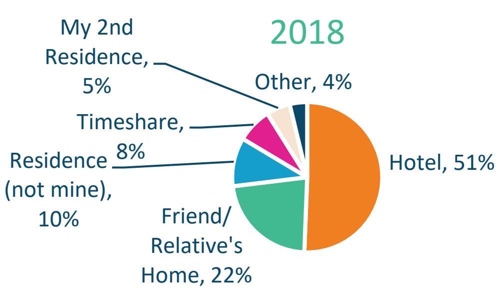
PAID VS. NON-PAID ACCOMMODATIONS

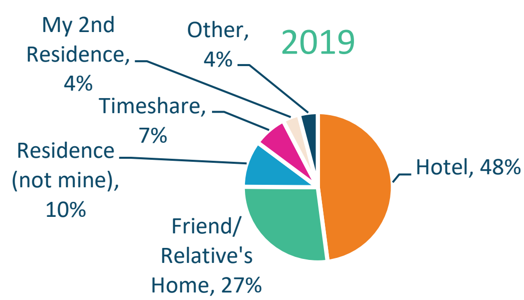
The percentage of domestic air visitors staying in paid accommodations declined between 2017 and 2019 due to a drop in the percentage of visitors staying in hotels. There has also been an increase in visitors staying in non-paid accommodations such as the homes of friends and relatives.

	2017	2018	2019	Change '19/'18
Paid	**75%**	**73%**	**72%**	—
Hotel Paid	*56%*	*51%*	*48%*	▼
Non-Hotel Paid	*19%*	*21%*	*23%*	▲
Non-Paid	**25%**	**27%**	**28%**	—

ACCOMMODATION TYPE

The homes of friends/relatives gained significant share in 2019.





HOTEL LEVEL

Air visitors who stayed in hotels were more likely to choose a high-end property in 2019. Luxury and upscale hotels gained 5 percentage points over the last three years to claim a 55% majority in 2019. The shift toward high-end hotels contributed to a 7% increase in hotel expenditures between 2018 and 2019.

	2017	2018	2019	Change '19/'18
High-End	**39%**	**41%**	**42%**	—
Luxury	9%	10%	11%	—
Upscale	30%	31%	31%	—
Mid-Level	**47%**	**45%**	**46%**	—
Upper Moderate	17%	16%	18%	▲
Moderate	30%	29%	28%	—
Economy	**14%**	**14%**	**12%**	▼
Lower Moderate	7%	7%	7%	—
Budget	7%	6%	5%	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS BY AIR (CONTINUED)

METHOD OF MAKING RESERVATION FOR AIR TRAVEL

In 2019, airline mobile apps saw a notable rise in popularity, with 8% of air visitors booking through one in 2019 compared to 4% in 2018. OTAs saw a similar increase in popularity. The percentage of domestic air visitors using travel agents to book air travel reached a historic low of 3% in 2019, down from 7% in 2014.

	2017	2018	2019	Change '19/'18
Airline Company	76%	83%	77%	▼
Airline Website	65%	68%	60%	▼
Airline Mobile App	2%	4%	8%	▲
800 Phone Number	4%	4%	3%	—
Ticket Counter or Office	3%	3%	3%	—
Travel Websites (OTAs)	11%	8%	12%	▲
Corporate Travel Department	6%	4%	7%	▲
Travel Agent	5%	4%	3%	—
Other	1%	1%	1%	—

METHOD OF MAKING RESERVATION FOR ACCOMMODATIONS

Online methods were the most popular way for domestic air visitors to reserve an acommodation in 2019, with 31% using a hotel chain website to do so. The percentage using travel agents to reserve an accommodation fell to 2% in 2019, a trend that parallels the decline in the use of travel agents to book air transportation.

	2017	2018	2019	Change '19/'18
Made Reservation	**95%**	**95%**	**96%**	—
Online	47%	49%	47%	▼
Hotel Chain Website	*32%*	*29%*	*31%*	▲
Travel Website	*12%*	*11%*	*9%*	▼
Non-Hotel Accommodations Site/App	-	*4%*	*4%*	—
Hotel Mobile App	*2%*	*4%*	*4%*	—
Other Website	*1%*	*0%*	*1%*	—
As Part of a Package	20%	18%	19%	—
Called Directly	12%	14%	14%	—
Corporate Travel Resource	7%	5%	8%	
Travel Agent	4%	4%	2%	▼
Other	6%	5%	6%	—
No Reservation	**5%**	**5%**	**4%**	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS BY AIR (CONTINUED)

TRIP PLANNING TIME FRAME

Nearly 60% of domestic air visitors planned their trip at least 2 months in advance of their travel in 2019, up from 57% in 2018. This was driven by visitors planning trips 2-3 months in advance, which grew 4 percentage points in 2019. Meanwhile, trips planned on extremely short notice - a week or less in advance of travel - fell to 7% in 2019 from 9% a year earlier.

	2017	2018	2019	Change '19/'18
1 Week or Less	10%	9%	7%	▼
2-3 Weeks	16%	14%	13%	—
1 Month	18%	21%	19%	▼
2-3 Months	31%	29%	33%	▲
4-5 Months	10%	10%	10%	—
6 Months	7%	7%	7%	—
More Than 6 Months	8%	10%	9%	—

TRIP PLANNING RESOURCES USED

Florida's domestic air visitors showed less tolerance for spontaneity in 2019, with the percentage using a resource to plan a trip falling to 78% from 73% the previous year. More than a third of visitors (35%) relied on past experience when planning travel in 2019, making it the most commonly used resource overall. Hotel chain websites grew in popularity between 2017 and 2019, surpassing internet search to become the third most commonly used resource.

	2017	2018	2019	Change '19/'18
Used Resource	**75%**	**73%**	**78%**	▲
Past Experience	34%	32%	35%	▲
Friend/Family Recommendation	20%	16%	20%	▲
Hotel Chain Websites	14%	13%	17%	▲
Internet Search (Google, Yahoo!, etc.)	18%	15%	17%	▲
Destination Websites	10%	8%	10%	▲
Travel Booking Website (Expedia, etc.)	10%	9%	9%	—
Attraction Websites	11%	9%	9%	—
Guest Ratings and Review Websites	10%	7%	8%	—
Mapping Websites (Google Maps, etc.)	7%	5%	7%	▲
Destination Visitor Guides - Online	5%	3%	4%	—
No Resource Used	**25%**	**27%**	**22%**	▼

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS BY AIR (CONTINUED)

AGE OF ADULT TRAVELERS

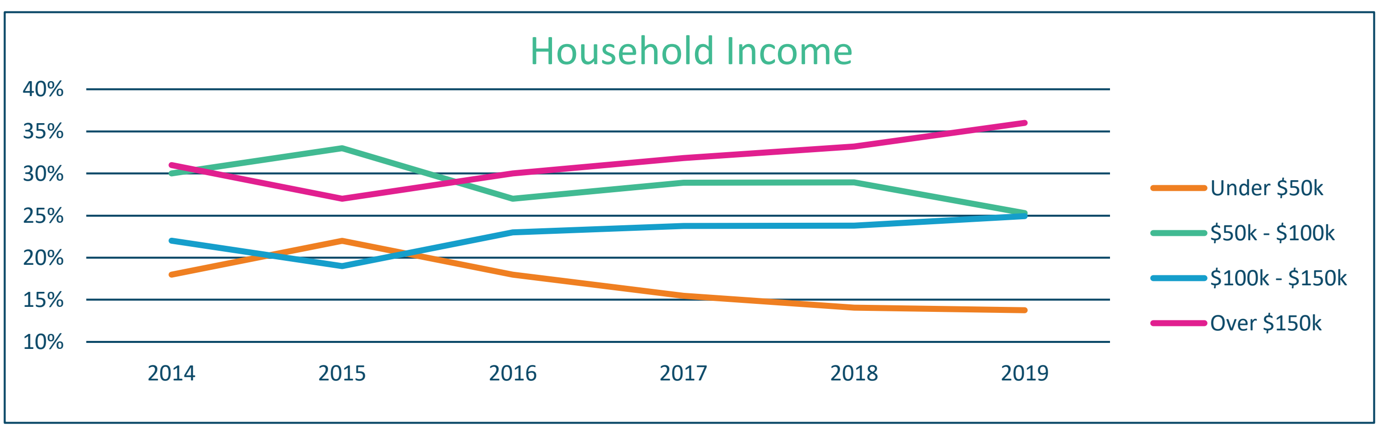
The average age of domestic air travelers fell to 48.3 in 2019 as visitation shifted toward the 18-34 demographic. Travelers between the ages of 18 and 49 grew from 52% of the total to 55% in 2019, while travelers 50 and older declined from 48% to 45%.

	2017	2018	2019	Change '19/'18
18 - 34 Years Old	23%	20%	23%	▲
35 - 49 Years Old	31%	32%	32%	—
50 - 64 Years Old	29%	29%	29%	—
65+ Years Old	17%	19%	16%	▼
Average Age	**48.4**	**49.5**	**48.3**	▼
Median Age	**47**	**48**	**47**	▼

HOUSEHOLD INCOME

The median household income of domestic air travelers grew by 9.4% between 2017 and 2019, reflecting a growing share of households earning $200,000 or more annually. There was a notable decline in households earning less than $100,000.

	2017	2018	2019	Change '19/'18
Under $50,000	15%	14%	14%	—
$50,000 - $74,999	13%	14%	11%	▼
$75,000 - $99,999	16%	15%	14%	—
$100,000 - $149,999	24%	24%	25%	—
$150,000 - $199,999	18%	20%	19%	—
$200,000+	14%	13%	17%	▲
Average	**$131,709**	**$132,531**	**$141,144**	6%
Median	**$111,743**	**$114,179**	**$122,271**	7%



Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS BY AIR (CONTINUED)

GENERATION

Gen X travelers were the largest generational cohort among Florida's domestic air visitors, accounting for more than one-third (34%) of the total. Boomers had previously held the largest share, but lost 4 percentage points between 2018 and 2019. Millennial and Gen Z travelers gained a 4 percentage point share, rising to 30%. This shift from Boomers to younger generational cohorts was evident in a decline in average age in 2019.

	2017	2018	2019	Change '19/'18
Millennials/Gen Z (1981 to 1997)	26%	26%	30%	▲
GenX (1965-1980)	34%	33%	34%	—
Boomers (1946 -1964)	35%	37%	33%	▼
Silent/GI (1945 or earlier)	5%	5%	4%	—

LIFESTAGE

Among Florida's domestic air visitors, those without children in the household accounted for a 64% majority in 2019. However, visitors with children in the household gained a 2 percentage point share between 2018 and 2019, rising to 36%. Affluent Families were the largest lifestage group in 2019, surpassing Affluent Matures by 3 percentage points to account for 23% of the total.

	2017	2018	2019	Change '19/'18
Young & Free (18-34; any income; no kids)	14%	13%	15%	▲
Young Family (18-34; any income; kids in HH)	10%	9%	9%	—
Maturing & Free (35-54; any income; no kids)	17%	15%	16%	—
Moderate Family (35-54; <$75K; kids in HH)	6%	6%	4%	▼
Affluent Family (35-54; $75K+; kids in HH)	18%	20%	23%	▲
Moderate Mature (55 or older, <$100K; no kids)	15%	17%	13%	▼
Affluent Mature (55 or older; $100K+, no kids)	20%	21%	20%	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

PROFILE OF DOMESTIC VISITORS TO FLORIDA TRAVELING BY AUTO

Prepared by VISIT FLORIDA

Research Department

DOMESTIC VISITORS TO FLORIDA TRAVELING BY AUTO

Summary:

> Domestic auto visitors accounted for 63% of all domestic visitors in 2019, up from 58% in 2017.

> Ninety-six percent of Florida's domestic auto visitors traveled to the Sunshine State for leisure in 2019, up from 93% in 2017. The share of auto visitors traveling to the state for business fell 3 percentage points to 4% over the same period.

> Florida's domestic auto visitors had an average travel party size of 2.2 persons in 2019. Travel parties composed of one male and one female were the most common party type, accounting for 42% of the total. Adults traveling alone accounted for 29%, while families accounted for 18% of the total.

> The top activities for domestic auto visitors in 2019 were beach/waterfront activities (46%), visiting friends and relatives (37%), culinary/dining experiences (30%), and shopping (28%), touring and sightseeing (16%), and visiting theme/amusement parks (16%).

> Florida's domestic auto visitors spend an average of $137.00 per person per day in 2019, a 3% increase over 2018. Lodging expenditures grew 7% to $57.80, while transportation expenditures fell 4% to $35.20. Shopping and entertainment/recreation expenditures both saw positive growth over 2018.

> The average length of stay for domestic auto visitors fell to 4.0 nights in 2019, from 4.2 nights in 2018. More than half (56%) of auto visitors stayed 1-3 nights, up 3 percentage points from 2018.

> The median income of domestic auto visitors was $83.6k in 2019, nearly even with the previous year but down 5.7% from 2017.

> The top origin state for domestic auto visitors in 2019 were Georgia (14.4%), North Carolina (7.1%), New York (6.4%), Texas (5.8%), and Tennessee (5.3%).

> Two-thirds (66%) of domestic auto visitors stayed in paid accommodations in 2019. Over half (54%) who stayed in a hotel chose a mid-level property. Nearly one-third (31%) of auto visitors stayed in the home of a friend or relative.

DOMESTIC VISITORS BY AUTOMOBILE

PRIMARY PURPOSE OF TRIP

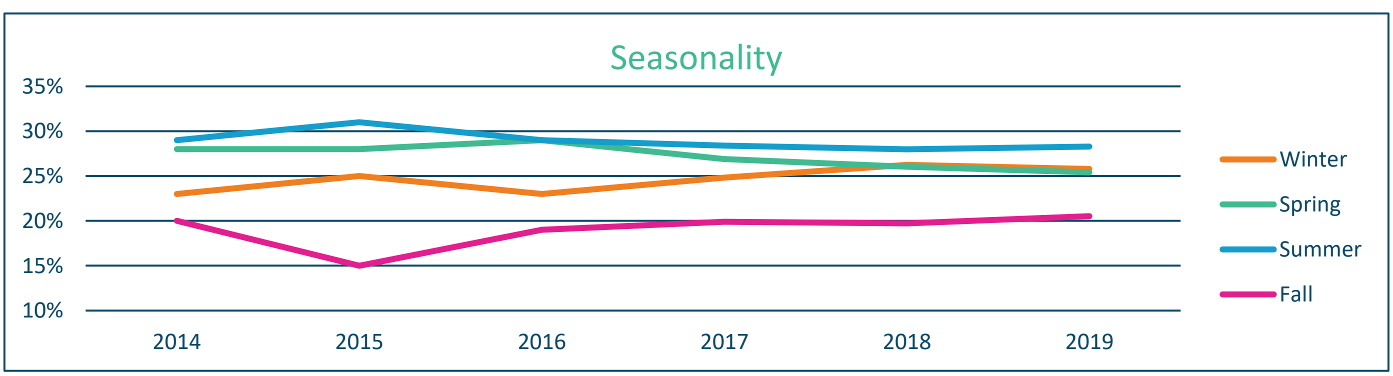
The share of Florida's domestic drive visitors traveling to the Sunshine State for business declined by 3 percentage between 2017 and 2019, reflecting a shift toward air travel among business travelers. General vacations were the most common primary purpose of trip over the 3-year period, accounting for 45% of all trips. Visiting friends and relatives jumped 2 percentage points to 45% in 2019, while getaway weekends saw a similar increase between 2017 and 2019.

	2017	2018	2019	Change '19/'18
Leisure	**92%**	**94%**	**97%**	▲
General Vacation	39%	45%	45%	—
Visit Friends/Relatives	25%	24%	26%	▲
Getaway Weekend	10%	11%	12%	—
Special Event	10%	7%	7%	—
Other Leisure/Personal	8%	7%	7%	—
Business	**7%**	**6%**	**4%**	▼
Transient Business	4%	3%	2%	—
Convention/Seminar/Meeting	3%	3%	2%	—

SEASONALITY

Nearly 1 in 3 (32%) domestic drive visitors traveled to Florida during the Summer months in 2019, the highest percentage since 2015. The share of visitors coming in Spring remained relatively stable between 2017 and 2019, though at a level significantly lower than the 29% share observed in 2016 when it was the busiest season.

	2017	2018	2019	Change '19/'18
Winter (Dec, Jan, Feb)	25%	26%	26%	—
Spring (Mar, Apr, May)	27%	26%	25%	—
Summer (Jun, Jul, Aug)	28%	28%	28%	—
Fall (Sept, Oct, Nov)	20%	20%	21%	—



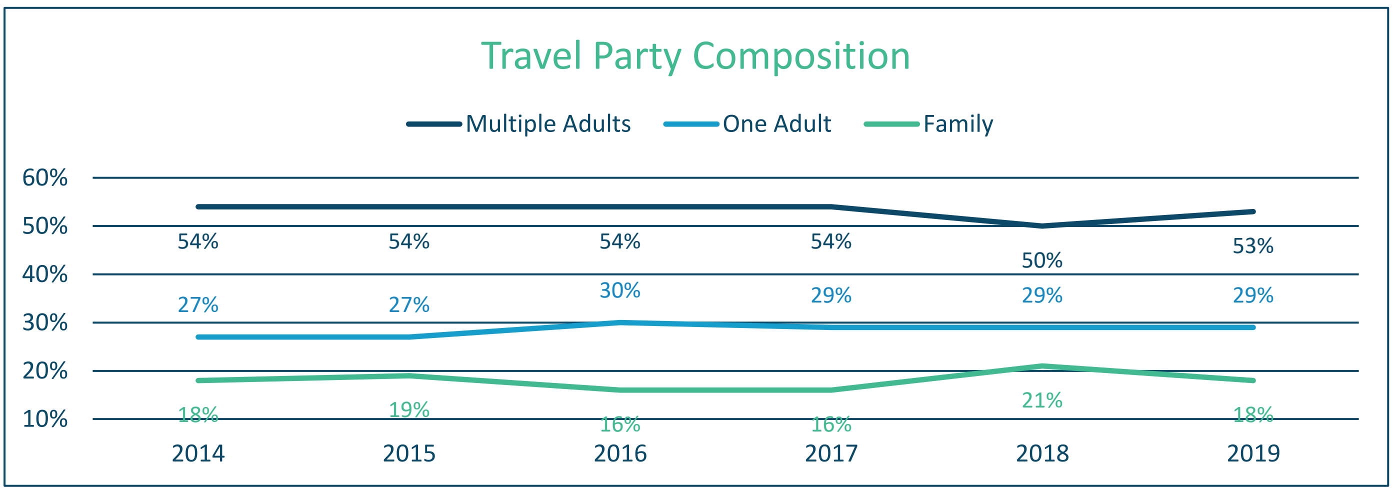
Sources: D.K. Shifflet, VISIT FLORIDA; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS BY AUTOMOBILE (CONTINUED)

TRAVEL PARTY COMPOSITION

For Florida's domestic drive visitors, travel parties consisting of one male and one female were the most common type in 2019 (42%). This was a larger share than for domestic visitors overall (37%), while single adult travel parties were less common among drive visitors (29%) than among all domestic visitors (35%). Travel parties with children declined 3 percentage points in 2019, but remained higher than in 2016 and 2017.

	2017	2018	2019	Change '19/'18
One Male and One Female	43%	38%	42%	▲
One Adult	29%	29%	29%	—
Families	16%	21%	18%	▼
Three or More Adults	7%	7%	7%	—
Two Males or Two Females	4%	5%	4%	—
Average Party Size	**2.2**	**2.3**	**2.2**	▼



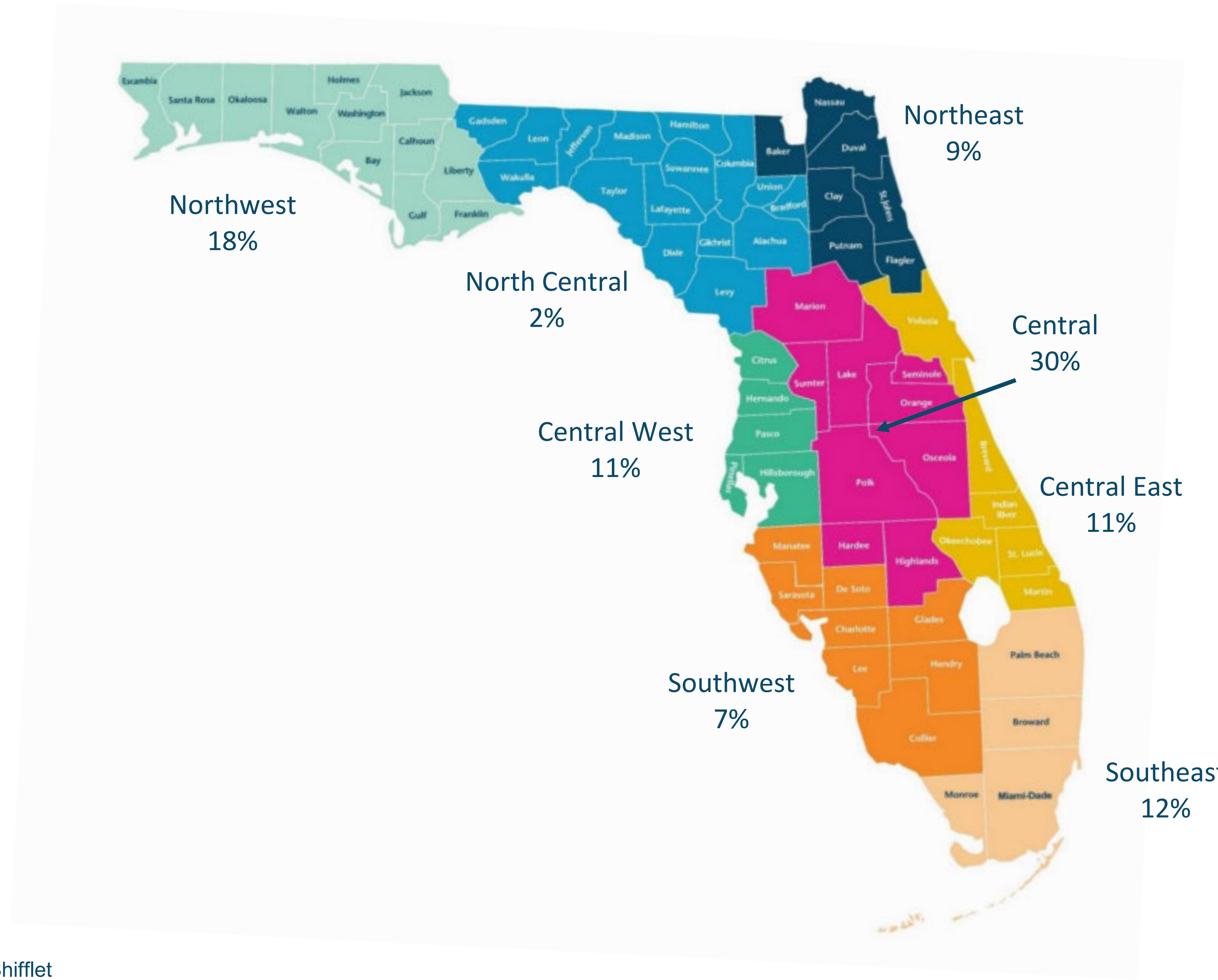
FLORIDA DESTINATION REGIONS

	2017	2018	2019	Change '19/'18
Central	30%	30%	29%	—
Northwest	16%	18%	17%	—
Southeast	13%	12%	14%	▲
Central West	12%	11%	12%	—
Central East	10%	11%	10%	—
Southwest	10%	7%	8%	—
Northeast	8%	9%	7%	▼
North Central	2%	2%	3%	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS BY AUTOMOBILE (CONTINUED)

FLORIDA DESTINATION REGIONS



Source: D.K. Shifflet

DOMESTIC VISITORS BY AUTOMOBILE (CONTINUED)

TOP ORIGIN STATES

Georgia was the most common origin state for drive visitors between 2017 and 2019, accounting for 14.4% of the total. North Carolina saw the most significant growth over the 3-year period (+2.6 percentage points), surpassing New York and Texas to become the second-ranked origin state in 2019.

Rank	State	2017	2018	2019	Change '19/'18
1	Georgia	13.6%	14.9%	14.4%	▼
2	North Carolina	4.5%	5.7%	7.1%	▲
3	New York	5.9%	6.3%	6.4%	—
4	Texas	5.4%	4.4%	5.8%	▲
5	Tennessee	5.4%	5.4%	5.3%	—
6	Alabama	5.1%	7.2%	5.0%	▼
7	Pennsylvania	3.8%	4.0%	4.9%	▲
8	Ohio	4.9%	4.3%	4.3%	—
9	Indiana	3.3%	3.7%	3.9%	—
10	Michigan	3.0%	3.8%	3.7%	—

TOP ORIGIN DESIGNATED MARKET AREAS (DMAs)

Atlanta accounted for the largest share of domestic drive visitors among DMAs, though its share declined slightly in 2019 compared to the previous year. New York City lost nearly 2 percentage points of visitor share, while Raleigh, Cincinnati, and Chicago saw notable gains.

Rank	DMA	2017	2018	2019	Change '19/'18
1	Atlanta, GA	9.4%	11.0%	10.7%	—
2	New York, NY	8.3%	6.8%	6.5%	—
3	Nashville, TN	3.0%	3.2%	2.9%	—
4	Chicago, IL	2.2%	2.2%	2.7%	▲
5	Philadelphia, PA	2.9%	3.1%	2.6%	▼
6	Washington, DC	2.2%	2.5%	2.5%	—
7	Birmingham, AL	1.8%	1.9%	2.3%	—
8	Raleigh-Durham , NC	1.8%	1.1%	2.1%	▲
9	Charlotte, NC	1.7%	1.8%	2.0%	—
10	Cincinnati, OH	1.4%	1.3%	1.8%	▲

Note: The Origin DMA data combines two years of data for each year shown to obtain a larger sample size, where 2019 figures are based on CY 2019-2018 data, 2018 figures are based on CY 2018-2017 data, and 2017 figures are based on CY 2017-2016 data.

Source: D.K. Shifflet; Arrows indicate change of at least 0.5 percentage points

DOMESTIC VISITORS BY AUTOMOBILE (CONTINUED)

ACTIVITIES DURING TRIP

Just under half (46%) of domestic drive visitors participated in a beach or waterfront activity in 2019, making it the most popular activity overall. Visiting friends and relatives reach a 6-year high of 37%. Meanwhile, shopping declined by 3 percentage points to a 10-year low of 28%.

Activity (Multiple Response)	2017	2018	2019	Change '19/'18
Beach/Waterfront	45%	46%	46%	—
Visit Friends/Relatives	33%	33%	37%	▲
Culinary/Dining Experience	31%	31%	30%	—
Shopping	30%	31%	28%	▼
Touring/Sightseeing	16%	16%	16%	—
Theme/Amusement/Water Parks	12%	14%	16%	▲
Parks (national/state, etc.)	13%	11%	13%	▲
Nightlife (bar, nightclub, etc.)	14%	11%	12%	—
Historic Sites	12%	10%	10%	—
Live Music	8%	8%	9%	—
Museums, Art Exhibits, etc.	7%	6%	8%	▲
Personal Celebration (anniversary, etc.)	6%	7%	8%	—
Wildlife Viewing	6%	8%	8%	—
Movies	8%	8%	7%	—
Festivals/Fairs (state, craft, etc.)	5%	8%	6%	▼
Zoo/Aquarium	4%	5%	6%	—
Holiday Celebration	5%	7%	5%	▼
Water Sports	5%	3%	5%	▲
Golfing	5%	4%	5%	—
Fishing	4%	6%	5%	—
Boating/Sailing	4%	5%	4%	—
Biking	4%	4%	3%	—
Amateur Sports (attend/participate)	4%	3%	3%	—
Business/Work	4%	2%	3%	—
Hiking	3%	3%	3%	—
Theater/Dance Performace	2%	2%	3%	—
Professional Sports Event	2%	2%	3%	—
Gambling (slots, cards, horses, etc.)	4%	3%	2%	—
Show: Boat, Car, Home	3%	4%	2%	▼
Camping	3%	2%	2%	—
Reunion/Graduation	3%	3%	2%	
Religious/Faith Based Conference	3%	3%	2%	—

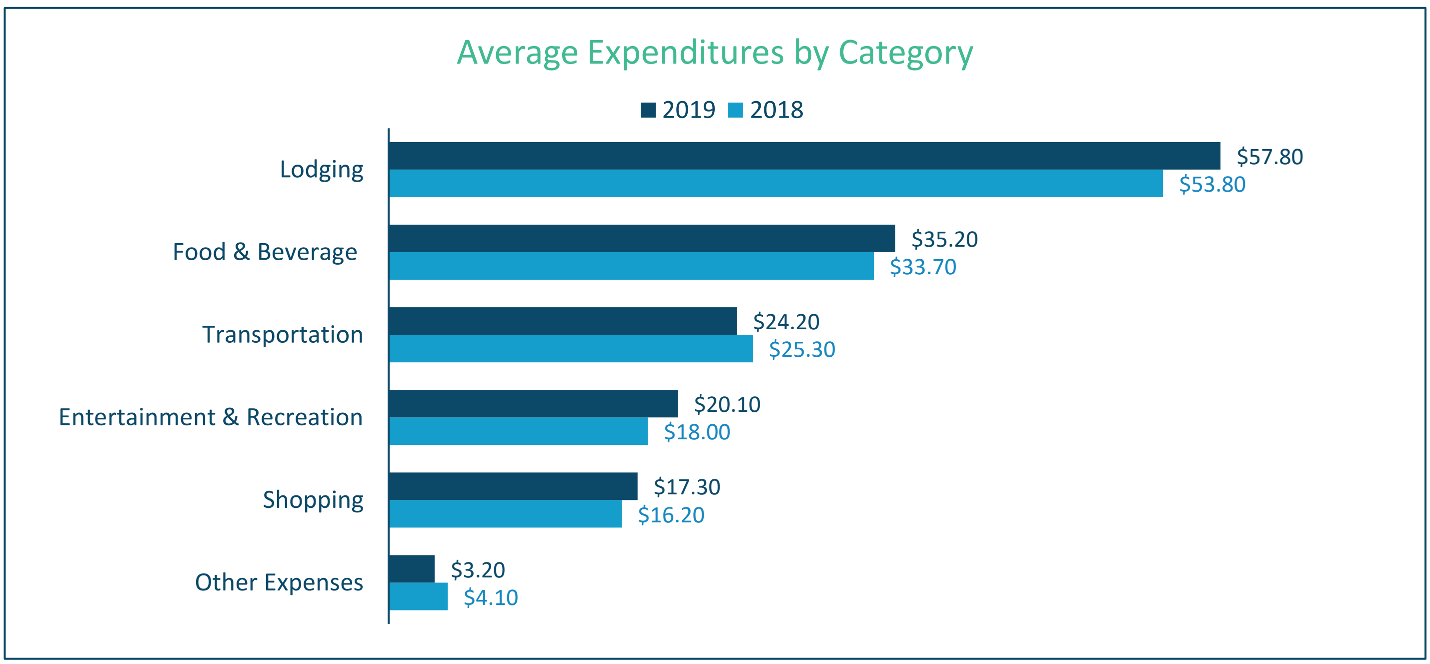
Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS BY AUTOMOBILE (CONTINUED)

AVERAGE EXPENDITURES PER PERSON PER DAY

In 2019, the average daily expenditures of domestic drive visitors increased by 3% over the previous year. The growth was attributable to rising average expenditures on lodging (+7%), rental cars (+11%), entertainment and recreation (+12%), and food and beverage (+4%). Average lodging expenditures in particular showed consistent increases in the 5-year period between 2015 and 2019, leaping 34.4% to reach $57.80. By contrast, average shopping expenditures fell -13.1% between 2016 and 2019.

	2017	2018	2019	Change '19/'18
Avg. Expenditures (incl. transportation)	**$134.00**	**$133.50**	**$137.00**	**3%**
Avg. Expenditures (excl. transportation)	**$110.80**	**$108.20**	**$112.80**	**4%**
Lodging - Total	$54.40	$53.80	$57.80	7%
Lodging - Room	*$65.50*	*$64.60*	*$66.80*	*3%*
Lodging - Services (internet, parking, etc.)	*$4.50*	*$7.90*	*$7.40*	*-6%*
Food & Beverage	$34.40	$33.70	$35.20	4%
Transportation - Total	*$23.20*	*$25.30*	*$24.20*	*-4%*
Transportation - Rental Car	*$36.70*	*$34.40*	*$38.10*	*11%*
Transportation - Other (taxi, gas, etc.)	*$16.10*	*$16.90*	*$15.40*	*-9%*
Entertainment & Recreation	$17.10	$18.00	$20.10	12%
Shopping	*$18.60*	*$16.20*	*$17.30*	*7%*
Other Expenses	$3.80	$4.10	$3.20	-22%



Source: D.K. Shifflet

DOMESTIC VISITORS BY AUTOMOBILE (CONTINUED)

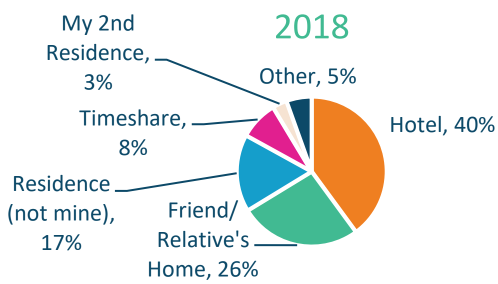
PAID VS. NON-PAID ACCOMMODATIONS

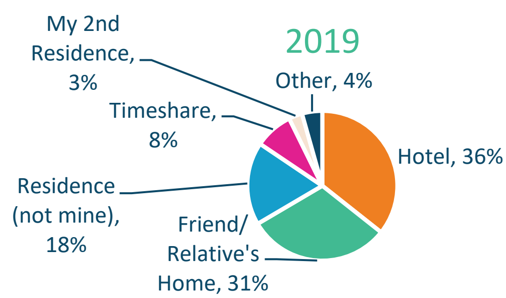
Florida's domestic drive visitors were 6 percentage points more likely to stay in a non-paid accommodation in 2019 than the year before. This was partly attributable to an increase in travelers visiting friends and relatives, who are significantly more likely to stay in a non-paid accommodation. Hotels accounted for most of the decline in paid accommodations.

	2017	2018	2019	Change '19/'18
Paid	**70%**	**72%**	**66%**	▼
Hotel Paid	*41%*	*40%*	*36%*	▼
Non-Hotel Paid	*29%*	*32%*	*30%*	▼
Non-Paid	**30%**	**28%**	**34%**	▲

ACCOMMODATION TYPE

Hotels lost 5 percentage points of market share to the homes of friends and relatives.





HOTEL LEVEL

More than half (54%) of domestic drive visitors who stayed in a hotel in 2019 chose a mid-level property. While mid-level hotels saw a 4 percentage point increase in share of visitors over the previous year, high-end properties lost 5 percentage points.

	2017	2018	2019	Change '19/'18
High End	**32%**	**35%**	**30%**	▼
Luxury	8%	8%	7%	—
Upscale	24%	27%	24%	▼
Mid-Level	**51%**	**50%**	**54%**	▲
Upper Moderate	17%	15%	19%	▲
Moderate	34%	35%	34%	—
Economy	**17%**	**15%**	**16%**	—
Lower Moderate	8%	8%	9%	—
Budget	9%	7%	7%	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS BY AUTOMOBILE (CONTINUED)

LENGTH OF STAY

Domestic drive visitors had a shorter average length of stay in 2019 compared to the previous year, as the share staying 1-3 nights increased by 3 percentage points. Meanwhile, the share of visitors staying 8 or more nights fell 2 percentage points to 7%.

	2017	2018	2019	Change '19/'18
1-3 nights	54%	53%	56%	▲
4-7 nights	37%	38%	37%	—
8+ nights	9%	9%	7%	▼
Average Nights in Florida	**4.2**	**4.2**	**4.0**	▼
Median Nights in Florida	**2.4**	**2.6**	**2.4**	▼

ACCOMMODATION RESERVATION TYPE

More than half (51%) of domestic drive visitors who stayed in a paid accommodation booked their stay online, with hotel chain websites (27%) and travel websites (15%) being the most common methods. Booking directly with the accommodation (21%) was also a common method. The share of visitors whose accommodations were included as part of a travel package increased from 14% in 2017 to 11% in 2019.

	2017	2018	2019	Change '19/'18
Made Reservation	**90%**	**93%**	**92%**	—
Online	44%	52%	51%	—
Hotel Chain Website	*25%*	*28%*	*27%*	—
Travel Website	*16%*	*13%*	*15%*	▲
Non Hotel Accommodations site/app		*7%*	*6%*	—
Hotel Mobile App	*3%*	*4%*	*3%*	—
Other Website	*0%*	*0%*	*0%*	—
Called Directly	22%	20%	21%	—
As Part of a Package	11%	13%	14%	—
Timeshare	5%	2%	2%	—
Other	9%	6%	5%	—
No Reservation	**10%**	**7%**	**8%**	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS BY AUTOMOBILE (CONTINUED)

TRIP PLANNING TIME FRAME

The share of domestic drive visitors planning their trip 2-4 weeks in advance grew by 5 percentage points to 34% between 2018 and 2019. By contrast, the share of visitors planning more spontaneous trips - those with only a week or less of planning in advance - saw a 2 percentage point decline over the same period. The share of visitors planning trips 6 or more in advance remained stable at 19% between 2017 and 2019.

	2017	2018	2019	Change '19/'18
1 Week or Less	17%	14%	12%	▼
2-3 Weeks	14%	13%	16%	▲
1 Month	16%	16%	18%	▲
2-3 Months	25%	28%	26%	▼
4-5 Months	9%	10%	8%	▼
6 Months	6%	7%	7%	—
More Than 6 Months	13%	12%	12%	—

TRIP PLANNING RESOURCES USED

Past experience and recommendations from friends and family were the most frequently used trip planning resources in 2019, with a combined 55% of visitors relying on them. Online resources gained in popularity, with destination websites seeing a notable increase of 3 percentage points between 2017 and 2019.

	2017	2018	2019	Change '19/'18
Used Resource	**79%**	**78%**	**77%**	—
Past Experience	34%	33%	33%	—
Friend/Family Recommendation	22%	18%	22%	▲
Internet Search (Google, Yahoo!, etc.)	17%	16%	18%	▲
Hotel Chain Websites	15%	14%	16%	▲
Mapping Websites (Google Maps, etc.)	10%	8%	10%	▲
Guest Ratings Websites (Yelp!, etc.)	9%	8%	10%	▲
Destination Websites	7%	9%	10%	—
Travel Booking Website (Expedia, etc.)	7%	6%	8%	▲
Attraction Websites	9%	9%	8%	—
Destination Visitor Guides - Online	7%	4%	5%	—
No Resource Used	**21%**	**22%**	**23%**	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS BY AUTOMOBILE (CONTINUED)

AGE OF ADULT TRAVELERS

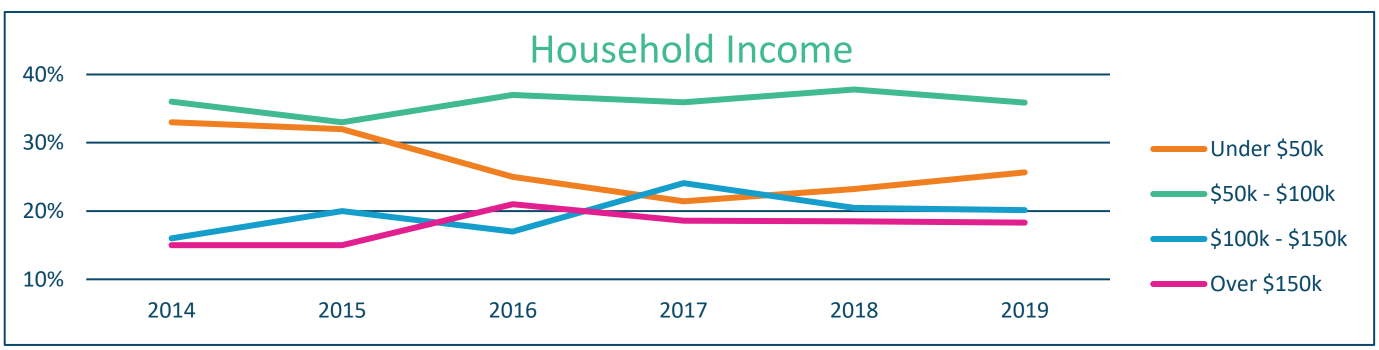
Despite the emergence of Millennial and Gen Z travelers over the past decade, the median age of domestic drive visitors climbed to 49 in 2019 from 42 in 2009. People between the ages of 35 and 64 lost a combined 6 percentage points in visitor share to those 18-34 and 65 plus, suggesting an increasing age divergence among drive visitors.

	2017	2018	2019	Change '19/'18
18 - 34 Years Old	24%	22%	25%	▲
35 - 49 Years Old	26%	32%	25%	▼
50 - 64 Years Old	26%	25%	26%	—
65+ Years Old	25%	21%	24%	▲
Average Age	**49.6**	**49.3**	**49.8**	▲
Median Age	**49**	**48**	**49**	▲

HOUSEHOLD INCOME

The median household income of domestic drive visitors fell by 5.3% between 2017 and 2019, in contrast to a 4% increase for domestic visitors overall. The share of drive visitors earning over $100,000 fell from 43% to 38%.

	2017	2018	2019	Change '19/'18
Under $35,000	12%	12%	15%	▲
$35,000 - $49,999	9%	11%	11%	—
$50,000 - $74,999	20%	20%	19%	—
$75,000 - $99,999	16%	18%	17%	—
$100,000 - $149,999	24%	20%	20%	—
$150,000 - $199,999	9%	12%	13%	—
$200,000+	10%	6%	5%	—
Average	**$109,096**	**$101,581**	**$98,284**	-3%
Median	**$88,378**	**$84,192**	**$83,646**	-1%



Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS BY AUTOMOBILE (CONTINUED)

GENERATION

The share of domestic drive visitors who belong to the Millennial and Gen Z cohorts rose by 3 percentage points to 30% between 2017 and 2019. The share of visitors who belong to the Gen X cohort trended in the opposite direction, falling to 28% from as high as 36% at the beginning of the decade in 2011. Boomers also saw a decline, falling to 35% in 2019.

	2017	2018	2019	Change '19/'18
Millennials/Gen Z (1981 to 1997)	27%	29%	30%	—
GenX (1965-1980)	29%	30%	28%	▼
Boomers (1946 -1964)	38%	35%	35%	—
Silent/GI (1945 or earlier)	6%	6%	7%	—

LIFESTAGE

Florida's domestic drive visitors were more likely to be young and childless in 2019, with visitors in the Young & Free lifestage seeing a 5 percentage point increase over the previous year. Meanwhile, travelers with families declined 8 percentage points to 32% over the same period. Moderate Matures remained the single largest lifestage cohort at 21%, even after a 3 percentage point decline between 2017 and 2019.

	2017	2018	2019	Change '19/'18
Young & Free (18-34; any income; no kids)	12%	11%	16%	▲
Young Family (18-34; any income; kids in HH)	12%	12%	12%	—
Maturing & Free (35-54; any income; no kids)	15%	12%	15%	▲
Moderate Family (35-54; <$75K; kids in HH)	6%	10%	6%	▼
Affluent Family (35-54; $75K+; kids in HH)	15%	18%	14%	▼
Moderate Mature (55 or older, <$100K; no kids)	24%	23%	21%	▼
Affluent Mature (55 or older; $100K+, no kids)	16%	15%	16%	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

PROFILE OF DOMESTIC VISITORS TO FLORIDA TRAVELING FOR LEISURE

Prepared by VISIT FLORIDA

Research Department

DOMESTIC LEISURE VISITORS TO FLORIDA

Summary:

> Leisure travelers accounted for 93% of Florida's domestic visitors in 2019.

> The top origin states of domestic leisure visitors in 2019 were New York (10.2%), Georgia (9.5%), and Texas (5.6%).

> The most popular destination region for Florida's leisure visitors in 2019 was the Central region (32%), followed by the Southeast (20%), and Central West (12%).

> A general vacation was the most common purpose of trip (47%) for domestic leisure visitors in 2019. Visiting friends/relatives (27%) and getaway weekends (11%) were also popular.

> Florida's domestic leisure visitors had an average travel party size of 2.2 persons. Forty-one percent of leisure visitors came to the Sunshine State with a travel party consisting of one male and one female, while 29% were adults traveling alone and 19% traveled with their families.

> Approximately two-thirds (67%) of Florida's domestic leisure visitors stayed in a paid accommodation in 2019, down from 71% the previous year as more travelers opted to stay with friends and relatives while in the Sunshine State.

> The top activities for leisure visitors in 2019 were beach/waterfront activities (47%), visiting friends/relatives (37%), culinary/dining experiences (32%), shopping (31%), and visiting theme/amusement/water parks (18%).

> Domestic leisure visitors stayed an average of 4.2 nights in Florida. Fifty percent of visitors stayed more than 3 nights.

> The average household income of domestic leisure visitors reached $94.4k in 2019, a 3.9% increase from 2018. Visitors with household incomes of $100k or more accounted for 45% of all visitors.

> The average age of domestic leisure visitors was 49.7 years in 2019. Visitors of 50 years of age and older accounted for 50% of the total, up from 48% in 2018.

DOMESTIC LEISURE VISITORS

PRIMARY PURPOSE OF TRIP

Among the primary purposes that compel leisure travelers to visit Florida, general vacations were by far the most common between 2015 and 2019. General vacations gained 5 percentage points over that 5-year period, reaching 47% of the total. Getaway weekends trended in the opposite direction, declining 3 percentage points to 11%.

	2017	2018	2019	Change '19/'18
General Vacation	44%	49%	47%	▼
Visit Friends/Relatives	27%	25%	27%	▲
Getaway Weekend	10%	11%	11%	—
Special Event	11%	8%	8%	—
Other Leisure/Personal	8%	7%	7%	—

TRANSPORTATION TYPE

Between 2017 and 2019, the share of Florida's leisure visitors traveling to the Sunshine State by air increased by 2.7 percentage points.

	2017	2018	2019	Change '19/'18
Air	31.1%	32.4%	33.8%	▲
Non-Air	68.9%	67.6%	66.2%	▼

SEASONALITY

The 5-year period between 2015 and 2019 saw a notable shift in seasonality as Winter displaced Spring as Florida's second most popular season for leisure travel. This was driven by a decline in the percentage of leisure travelers visiting in Spring, which fell 4 percentage points to 25%.

	2017	2018	2019	Change '19/'18
Winter (Dec, Jan, Feb)	24%	26%	26%	—
Spring (Mar, Apr, May)	27%	25%	25%	—
Summer (Jun, Jul, Aug)	30%	28%	28%	—
Fall (Sept, Oct, Nov)	19%	20%	20%	—

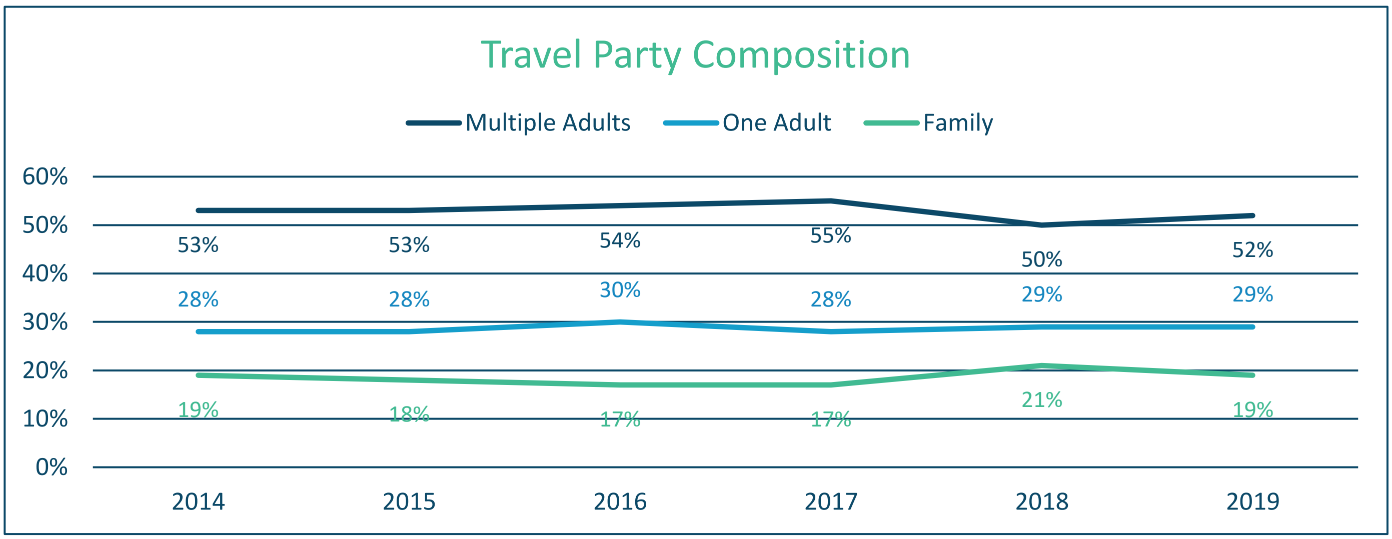
Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC LEISURE VISITORS (CONTINUED)

TRAVEL PARTY COMPOSITION

The average party size of Florida leisure travelers was 2.2 in 2019, a number that has not fluctuated significantly since 2013.

	2017	2018	2019	Change '19/'18
One Male and One Female	43%	38%	41%	▲
One Adult	28%	29%	29%	—
Families	17%	21%	19%	▼
Three or More Adults	7%	7%	6%	—
Two Males or Two Females	5%	5%	5%	—
Average Party Size	**2.2**	**2.2**	**2.2**	—



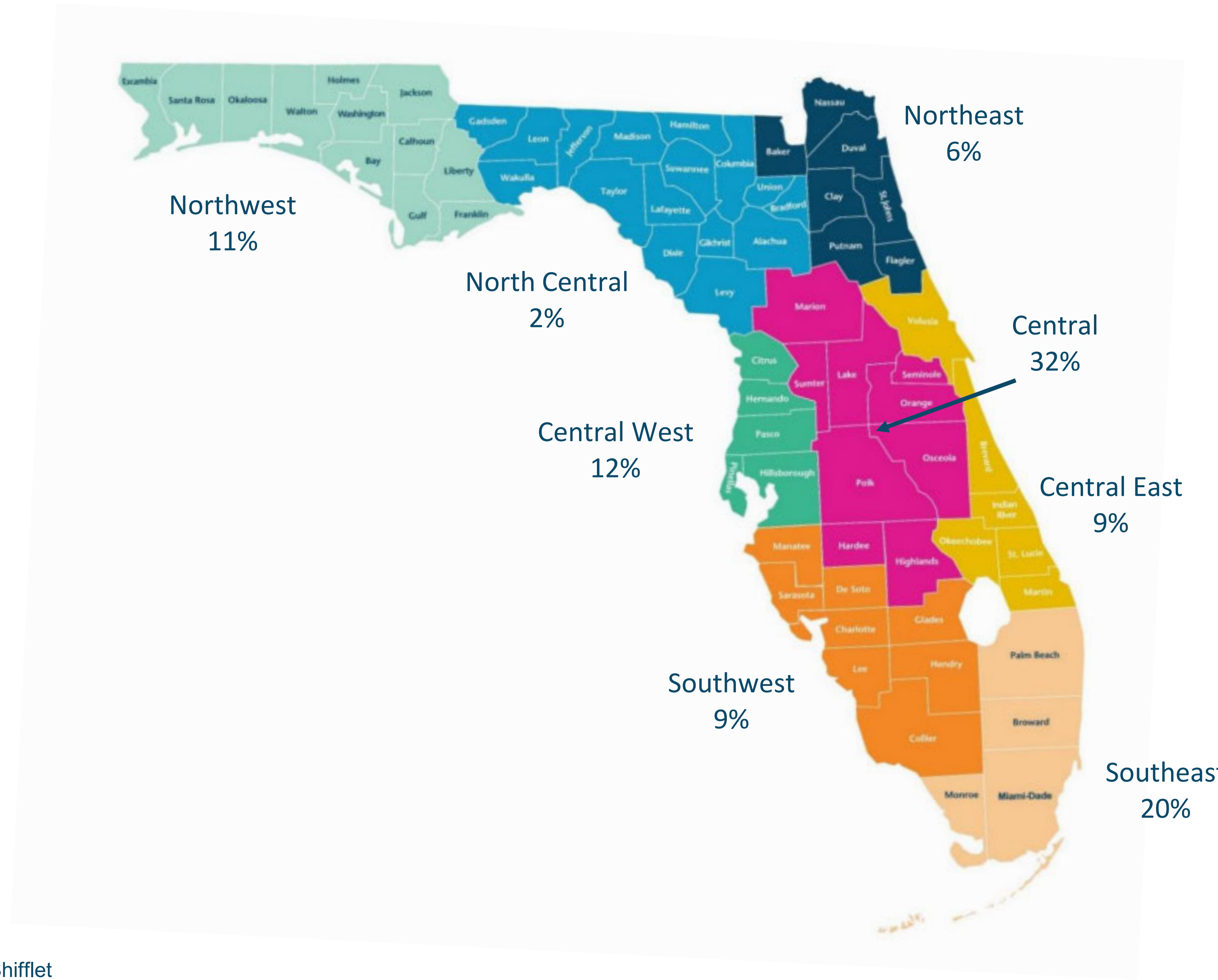
FLORIDA DESTINATION REGIONS

	2017	2018	2019	Change '19/'18
Central	34%	34%	32%	▼
Southeast	17%	18%	20%	▲
Central West	12%	11%	12%	—
Northwest	11%	12%	11%	—
Southwest	10%	9%	9%	—
Central East	8%	9%	9%	—
Northeast	6%	6%	6%	—
North Central	1%	1%	2%	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC LEISURE VISITORS (CONTINUED)

FLORIDA DESTINATION REGIONS



Source: D.K. Shifflet

DOMESTIC LEISURE VISITORS (CONTINUED)

TOP ORIGIN STATES

New York overtook Georgia to become the top origin state for Florida's leisure visitors in 2019, with an increase of 1.2 percentage points in share over the previous year. The share of Florida visitors originating in Texas grew by 1.4 percentage points, leaping to 3rd place in 2019 from 10th place in 2018. By contrast, Illinois fell from 4.7% to 4.1%, droping to 8th place.

Rank	State	2017	2018	2019	Change '19/'18
1	New York	8.6%	9.0%	10.2%	▲
2	Georgia	9.1%	10.7%	9.5%	▼
3	Texas	5.4%	4.2%	5.6%	▲
4	Ohio	5.5%	4.6%	5.5%	▲
5	Pennsylvania	5.3%	5.0%	5.1%	—
6	North Carolina	3.7%	4.7%	5.1%	—
7	New Jersey	4.4%	4.3%	4.2%	—
8	Illinois	3.8%	4.7%	4.1%	▼
9	Tennessee	4.7%	4.4%	4.1%	—
10	Michigan	3.3%	3.9%	3.9%	—

TOP ORIGIN DESIGNATED MARKET AREAS (DMAs)

The top origin DMA for leisure visitors between 2017 and 2019 was New York City, with a substantially larger share of visitors than the next largest market (Atlanta, GA). New York's share of leisure visitors reached 10.5% in 2019, compared to Georgia's 7.4% share. While most of the top DMAs had relatively stable visitor shares between 2017 and 2019, Dallas-Fort Worth saw its share expand by 0.4 percentage points to reach 1.9%. Raleigh-Durham's share of visitors also grew, increasing to 1.6% in 2019 from 1.0% the previous year.

Rank	DMA	2017	2018	2019	Change '19/'18
1	New York, NY	10.6%	9.8%	10.5%	▲
2	Atlanta, GA	6.8%	7.7%	7.4%	—
3	Chicago, IL	3.7%	3.6%	3.7%	—
4	Philadelphia, PA	3.6%	3.9%	3.5%	—
5	Boston, MA	2.9%	2.8%	3.0%	—
6	Washington, DC	2.7%	2.9%	2.8%	—
7	Nashville, TN	2.5%	2.7%	2.3%	—
8	Detroit, MI	1.9%	2.0%	2.0%	—
9	Dallas-Fort Worth, TX	1.5%	1.6%	1.9%	—
10	Raleigh-Durham, NC	1.5%	1.0%	1.6%	▲

Source: D.K. Shifflet; Arrows indicate change of at least 0.5 percentage points

DOMESTIC LEISURE VISITORS (CONTINUED)

ACTIVITIES DURING TRIP

Just under half (47%) of domestic leisure visitors to Florida in 2019 went to a beach or waterfront location, making it the most popular activity that year. Thirty-seven percent visited friends and relatives while in Florida, up from 33% in 2018. Shopping has fallen significantly in popularity, falling to 31% from 36% in 2015.

Activity (Multiple Response)	2017	2018	2019	Change '19/'18
Beach/Waterfront	47%	46%	47%	—
Visit Friends/Relatives	36%	33%	37%	▲
Culinary/Dining Experience	34%	33%	32%	—
Shopping	32%	31%	31%	—
Theme/Amusement/Water Parks	15%	18%	18%	—
Touring/Sightseeing	18%	16%	17%	—
Nightlife (bar, nightclub, etc.)	15%	13%	14%	—
Parks (national/state, etc.)	13%	12%	13%	—
Live Music	9%	9%	10%	—
Historic Sites	11%	9%	9%	—
Personal Special Event (anniversary, etc.)	7%	7%	8%	—
Movies	8%	8%	7%	—
Wildlife Viewing	7%	8%	7%	—
Museums, Art Exhibits, etc.	7%	6%	7%	—
Festivals/Fairs (state, craft, etc.)	5%	7%	6%	—
Holiday Celebration (Thanksgiving, etc.)	5%	7%	5%	▼
Zoo/Aquarium	5%	5%	5%	—
Golfing	5%	4%	5%	—
Water Sports	6%	3%	4%	—
Boating/Sailing	5%	5%	4%	—
Fishing	4%	6%	4%	▼
Biking	4%	3%	3%	—
Gambling (slots, cards, horses, etc.)	4%	3%	3%	—
Show: Boat, Car, Home	3%	4%	3%	—
Hiking	3%	3%	3%	—
Theater/Dance Performance	3%	2%	3%	—
Professional Sports Event	2%	3%	3%	—
Amateur Sports (attend/participate)	3%	2%	3%	—
Religious/Faith Based Conference	3%	2%	2%	—
Wedding	3%	2%	2%	—
Camping	2%	2%	2%	—

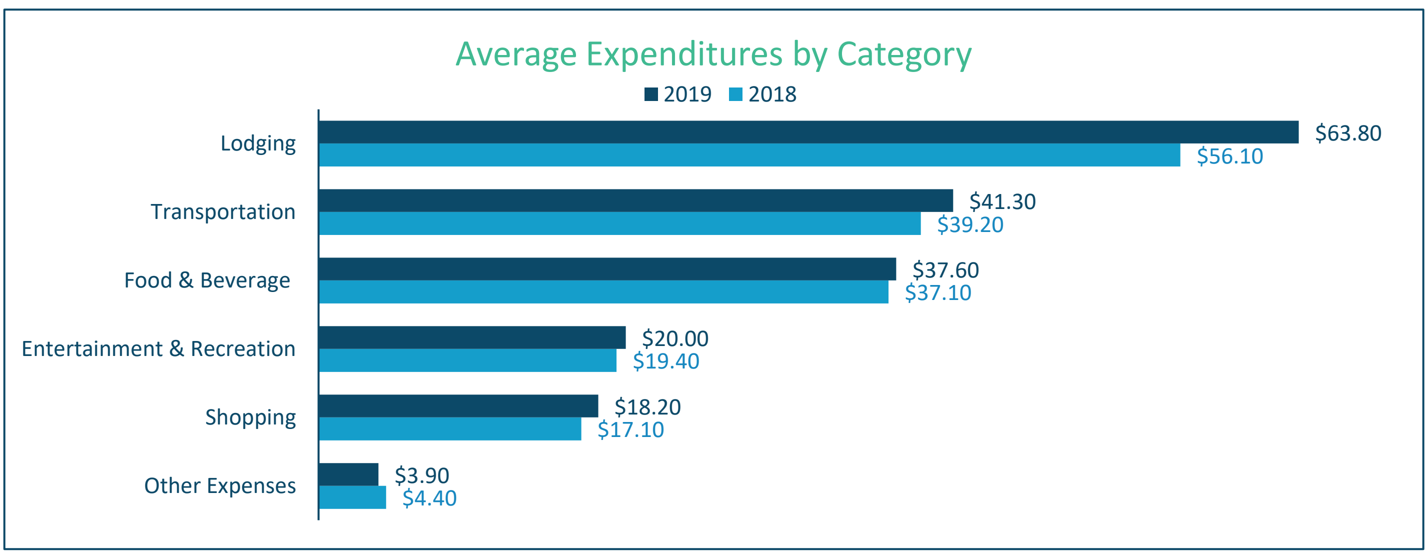
Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC LEISURE VISITORS (CONTINUED)

AVERAGE EXPENDITURES PER PERSON PER DAY

The average expenditure of Florida's domestic leisure travelers grew by 4% in 2019 to reach nearly $160 per person per day. A 14% increase in lodging expenditures was a contibuting factor, as was a 5% increase in spending on transportation. Shopping expanditures saw a 6% jump, despite participation in shopping as an activity remaining flat from the previous year. Average spending in the food & beverage and entertainment & recreation categories showed rates of growth more in line with the rate of inflation in the Consumer Price Index (CPI, +2.3% in 2019).[1]

	2017	2018	2019	Change '19/'18
Avg. Expenditures (incl. transportation)	**$152.10**	**$153.10**	**$159.60**	**4%**
Avg. Expenditures (excl. transportation)	**$113.80**	**$114.00**	**$118.30**	**4%**
Lodging - Total	$54.80	$56.10	$63.80	14%
Lodging - Room	*$66.40*	*$68.80*	*$74.20*	*8%*
Lodging - Services (internet, parking, etc.)	*$6.40*	*$8.60*	*$11.70*	*36%*
Transportation - Total	$38.30	$39.20	$41.30	5%
Transportation - Total (excluding airfare)	*$21.40*	*$22.50*	*$21.60*	*-4%*
Transportation - Airfare	*$48.10*	*$47.60*	*$51.60*	*8%*
Transportation - Rental Car	*$34.30*	*$33.50*	*$37.30*	*11%*
Transportation - Other (taxi, bus , gas, etc.)	*$12.50*	*$13.10*	*$11.80*	*-10%*
Food & Beverage	$36.30	$37.10	$37.60	1%
Entertainment & Recreation	$19.10	$19.40	$20.00	3%
Shopping	$18.70	$17.10	$18.20	6%
Other Expenses	$4.30	$4.40	$3.90	-11%



[1] December 2019 12-month percentage change in CPI was 2.3%. Source: U.S. Bureau of Labor Statistics.

Source: D.K. Shifflet

DOMESTIC LEISURE VISITORS (CONTINUED)

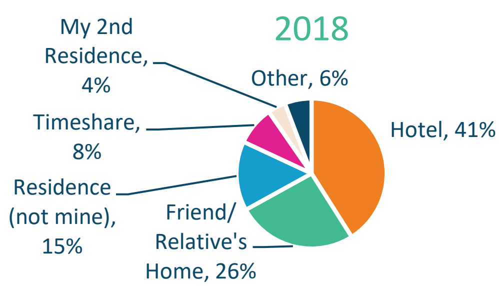
PAID VS. NON-PAID ACCOMMODATIONS

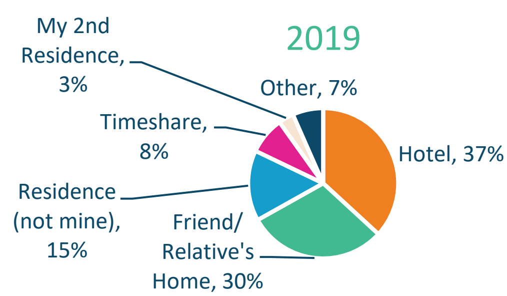
Two-thirds of domestic leisure visitors (67%) stayed in a paid accommodation in 2019, down 4 percentage points from the previous year. Hotels were responsible for the decline, which reflected a shift among leisure visitors toward unpaid accommodations such as the homes of friends and relatives.

	2017	2018	2019	Change '19/'18
Paid	**69%**	**71%**	**67%**	▼
Hotel Paid	*41%*	*41%*	*37%*	▼
Non-Hotel Paid	*28%*	*30%*	*30%*	—
Non-Paid	**31%**	**29%**	**33%**	▲

ACCOMMODATION TYPE

Hotels lost 4 percentage points of market share to the homes of friends and relatives.





HOTEL LEVEL

In 2019, Florida's domestic leisure visitors were more likely to stay in mid-level hotels than in the previous year. The share of visitors staying in upper moderate and moderate properties grew by a combined 3 percentages points in visitor share, while budget and upscale properties fell 3 percentage points to 33%.

	2017	2018	2019	Change '19/'18
High End	**37%**	**41%**	**39%**	▼
Luxury	10%	11%	11%	—
Upscale	27%	30%	28%	▼
Mid-Level	**47%**	**45%**	**48%**	▲
Upper Moderate	16%	16%	18%	▲
Moderate	31%	29%	30%	—
Economy	**16%**	**15%**	**13%**	▼
Lower Moderate	7%	8%	8%	—
Budget	8%	7%	5%	▼

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC LEISURE VISITORS (CONTINUED)

LENGTH OF STAY

Short stays were slightly more common in 2019 than the previous year. Half (50%) of domestic leisure visitors to Florida stayed 1-3 nights, up 1 percentage point from the previous year. This change was reflected in a slight decrease in average length of stay, which fell from 4.3 nights in 2018 to 4.2 nights in 2019.

	2017	2018	2019	Change '19/'18
1-3 nights	49%	49%	50%	—
4-7 nights	42%	42%	42%	—
8+ nights	9%	9%	8%	—
Average Nights in Florida	**4.3**	**4.3**	**4.2**	—
Median Nights in Florida	**2.8**	**2.9**	**2.9**	—

ACCOMMODATION RESERVATION TYPE

In 2019, 49% of Florida's domestic leisure visitors booked their accommodations online. Hotel chain websites were the preferred online method (27%), followed by travel websites (13%), and non-hotel accommodations sites (5%). Leisure visitors were 2 percentage points more likely to have had their accommodations included as part of a package in 2019 than the previous year.

	2017	2018	2019	Change '19/'18
Made Reservation	**92%**	**93%**	**93%**	—
Online	46%	51%	49%	▼
Hotel Chain Website	*27%*	*28%*	*27%*	—
Travel Website	*16%*	*13%*	*13%*	—
Non Hotel Accommodations site/app	-	*7%*	*5%*	▼
Hotel Mobile App	*2%*	*4%*	*3%*	—
Other Website	*1%*	*0%*	*1%*	—
Called Directly	19%	19%	20%	—
As Part of a Package	15%	15%	17%	▲
Travel Agent	3%	2%	2%	—
Timeshare	4%	2%	1%	
Other	5%	3%	4%	—
No Reservation	**8%**	**7%**	**7%**	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC LEISURE VISITORS (CONTINUED)

TRIP PLANNING TIME FRAME

A majority (59%) of Florida's leisure visitors planned their trips at least 2 months in advance in 2019. Compared to the previous year, leisure visitors were less likely to to take a trip planned a week or less in advance by 2 percentage points. They instead opted for a slightly longer time frame of 2-3 weeks, which increased from an 11% share of visitors in 2018 to 13% in 2019.

	2017	2018	2019	Change '19/'18
1 Week or Less	13%	11%	9%	▼
2-3 Weeks	12%	11%	13%	▲
1 Month	16%	17%	18%	—
2-3 Months	27%	29%	29%	—
4-5 Months	11%	11%	10%	—
6 Months	7%	7%	8%	—
More Than 6 Months	13%	13%	12%	—

TRIP PLANNING RESOURCES USED

Past experience was the most common resource that leisure visitors used to plan their Florida trip in 2019 (35%). Recommendations from friends, family, and colleagues were used by 22% of these visitors, up 4 percentage points from the previous year. A similar increase in popularity was seen in hotel chain websites, which 16% of visitors used in 2019 compared to 12% in 2018.

	2017	2018	2019	Change '19/'18
Used Resource	**80%**	**78%**	**80%**	▲
Past Experience	36%	34%	35%	—
Friend/Family Recommendation	24%	18%	22%	▲
Internet Search (Bing, Google etc.)	18%	16%	18%	▲
Hotel Chain Websites	14%	12%	16%	▲
Destination Websites	9%	10%	10%	—
Attraction Websites	11%	10%	9%	—
Review Websites (TripAdvisor, Yelp!, etc.)	10%	8%	9%	—
Travel Booking Website (Expedia, etc.)	9%	7%	9%	▲
Mapping Websites (Google Maps, etc.)	9%	6%	8%	▲
Destination Visitor Guides - Online	6%	4%	5%	—
No Resource Used	**20%**	**22%**	**20%**	▼

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC LEISURE VISITORS (CONTINUED)

AGE OF ADULT TRAVELERS

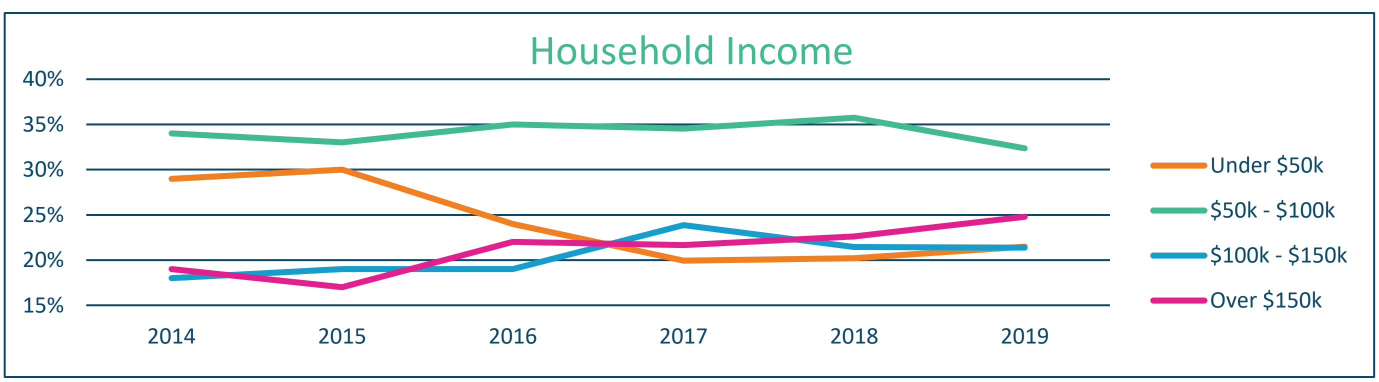
Florida's domestic leisure visitors had an average age of 49.7 in 2019, slightly higher than domestic visitors overall (49.3). The average age of domestic leisure visitors has been trending upward since 2010 when it was 46 years, driven by a decrease in the share of visitors in the 18-34 cohort (29% in 2010, 23% in 2019) and an increase in the 55+ cohort (30% in 2010, 41% in 2019)

	2017	2018	2019	Change '19/'18
18 - 34 Years Old	23%	21%	23%	▲
35 - 49 Years Old	26%	32%	27%	▼
50 - 64 Years Old	27%	27%	28%	—
65+ Years Old	23%	21%	22%	—
Average Age	**49.6**	**49.8**	**49.7**	—
Median Age	**49**	**48**	**49**	▲

HOUSEHOLD INCOME

The median household income of Florida's domestic leisure visitors increased by 3.9% in 2019, slower than the growth rate for domestic visitors overall.

	2017	2018	2019	Change '19/'18
Under $35,000	12%	11%	12%	—
$35,000 - $49,999	8%	9%	10%	—
$50,000 - $74,999	19%	18%	16%	▼
$75,000 - $99,999	16%	17%	16%	—
$100,000 - $149,999	24%	21%	21%	—
$150,000 - $199,999	11%	15%	15%	—
$200,000+	11%	8%	9%	—
Average	**$113,908**	**$110,126**	**$113,783**	3%
Median	**$92,886**	**$90,833**	**$94,410**	4%



Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC LEISURE VISITORS (CONTINUED)

GENERATION

While Boomers were the single largest generational cohort among domestic leisure visitors from 2017 to 2019, their share of visitors fell by 3 percentage points. Millennial and Gen Z visitors increased their combined share by the same amount, jumping from 26% in 2017 to 29% in 2019.

	2017	2018	2019	Change '19/'18
Millennials/Gen Z (1981 to 1997)	26%	27%	29%	▲
GenX (1965-1980)	30%	31%	30%	—
Boomers (1946 -1964)	38%	36%	35%	—
Silent/GI (1945 or earlier)	6%	6%	6%	—

LIFESTAGE

Florida's domestic leisure visitors skewed childless and affluent in 2019, with the Young & Free and Mature & Free cohorts gaining a combined 5 percentage points in visitor share form the previous year. Affluent Families and Affluent Matures grew from 32% in 2017 to 36% in 2019. Young and Moderate families lost a combined 3 percentage points over the same time period, falling to 15% in 2019.

	2017	2018	2019	Change '19/'18
Young & Free (18-34; any income; no kids)	12%	11%	15%	▲
Young Family (18-34; any income; kids in HH)	12%	10%	10%	—
Maturing & Free (35-54; any income; no kids)	15%	13%	15%	▲
Moderate Family (35-54; <$75K; kids in HH)	6%	8%	5%	▼
Affluent Family (35-54; $75K+; kids in HH)	15%	18%	18%	—
Moderate Mature (55 or older, <$100K; no kids)	22%	22%	19%	▼
Affluent Mature (55 or older; $100K+, no kids)	17%	17%	18%	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

PROFILE OF DOMESTIC VISITORS TO FLORIDA TRAVELING FOR BUSINESS

Prepared by VISIT FLORIDA

Research Department

DOMESTIC BUSINESS VISITORS TO FLORIDA

Summary:

> Travelers visiting Florida for business purposes accounted for 7% of all domestic visitors to Florida in 2019, a decline of 2 percentage points from the previous year.

> The most popular region in Florida for business travelers in 2019 was the Central region (45%), followed by the Central West (17%) and Southeast (16%) regions. The Central region increased its share by 4 percentage points between 2017 and 2019, while the Southeast region fell 5 percentage points over the same period.

> The most common purpose of trip for business travelers to Florida in 2019 was transient business (38%), followed by attending conventions (26%), and attending seminars and trainings (20%).

> Business travelers who visited Florida in 2019 had an average party size of 1.4 people. Nearly 4 in 5 business travelers (78%) came to the Sunshine State alone.

> The top non-business-related activities for Florida's business visitors in 2019 were culinary/dining experiences (27%), beach and waterfront activities (21%), and nightlife (15%).

> The average length of stay for business travelers to Florida was 3.1 nights in 2019, up from 2.8 nights the previous year. Seventy-one percent of business visitors stayed between 1 and 3 nights.

> Florida's business visitors spent an average of $294 per person per day in 2019, a 12% increase from 2018. Business visitors saw significantly more rapid year-over-year growth in transportation (+16%) and lodging (+18%) than leisure travelers.

> More than 4 in 5 business visitors (82%) stayed in a paid hotel in 2019, of which 57% opted for a high-end accommodation compared to 44% in 2018.

> The median household income of Florida's business visitors was 14.9% higher in 2019 than the previous year, reaching $134.5k. The share of business visitors with household incomes above $100,000 jumped 10 percentage points to 68%.

> The average age of a domestic business visitor to Florida in 2019 was 44.5 years. The 18-34 year old cohort accounted for 31% of business visitors, up from 25% in 2017.

DOMESTIC BUSINESS VISITORS

PRIMARY PURPOSE OF TRIP

Transient business was the most common reason for domestic business travelers to visit the Sunshine State in 2019, accounting for 38% of the total. Conventions were also a serious draw for business travelers in 2019, bringing in a larger share (26%) than any year since 2010.

	2017	2018	2019	Change '19/'18
Transient Business	42%	42%	38%	▼
Convention	24%	24%	26%	▲
Seminar/Training	18%	17%	20%	▲
Other Group Meetings	15%	17%	16%	—

TRANSPORTATION TYPE

The share of business visitors traveling to Florida by air leapt by 14.6 percentage points to 67.5% in 2019, after having fallen by 4.8 percentage points to 52.9% between 2017 and 2018.

	2017	2018	2019	Change '19/'18
Air	57.7%	52.9%	67.5%	▲
Non-Air	42.3%	47.1%	32.5%	▼

SEASONALITY

Florida's domestic business visitors were more likely to travel to the state in Spring than any other season in 2019. Summer became more popular between 2017 and 2019, as the share visiting between June and August gained 7 percentage points to reach 27%. The percentage visiting in Winter receded to 19% during the same period, marking the fifth consecutive Winter in which the share of business visitors declined relative to the other seasons.

	2017	2018	2019	Change '19/'18
Winter (Dec, Jan, Feb)	24%	21%	19%	▼
Spring (Mar, Apr, May)	29%	27%	31%	▲
Summer (Jun, Jul, Aug)	20%	25%	27%	▲
Fall (Sept, Oct, Nov)	27%	27%	23%	▼

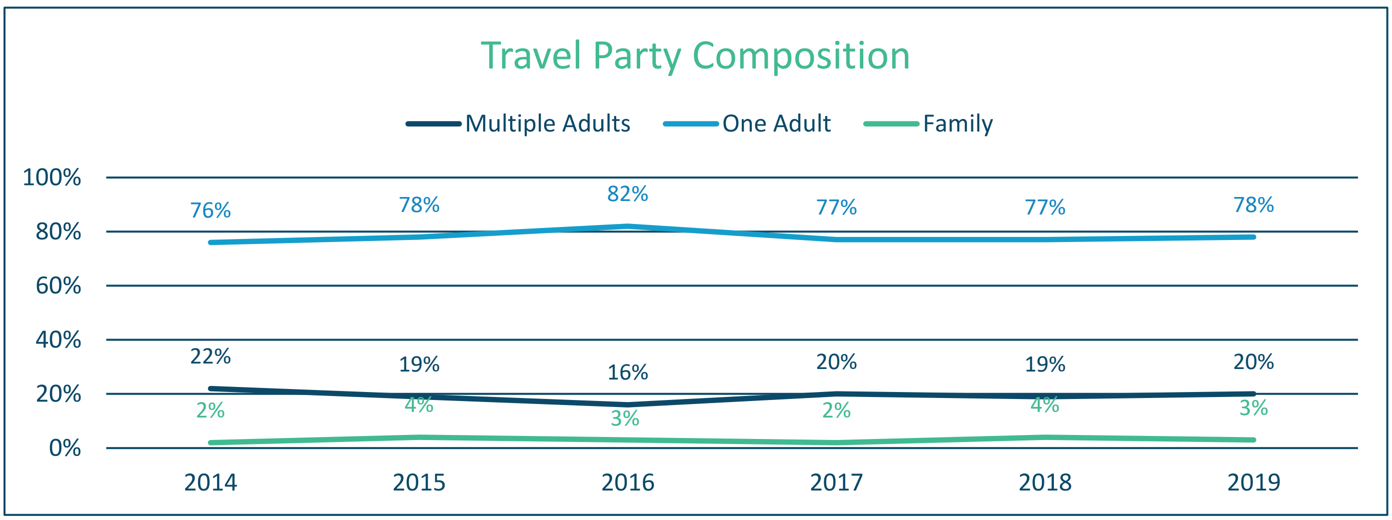
Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC BUSINESS VISITORS (CONTINUED)

TRAVEL PARTY COMPOSITION

Florida's business travel parties were relatively stable in composition over the five year period between 2015 to 2019, with nearly four in five parties consisting of a single adult throughout the period. Parties consisting of two males or two females were an exception, with the share of total parties growing 2 percentage points to 5% between 2015 and 2019.

	2017	2018	2019	Change '19/'18
One Adult	77%	77%	78%	—
One Male and One Female	13%	12%	11%	—
Two Males or Two Females	4%	4%	5%	—
Three or More Adults	3%	3%	4%	—
Families	2%	4%	3%	—
Average Party Size	**1.3**	**1.4**	**1.4**	—



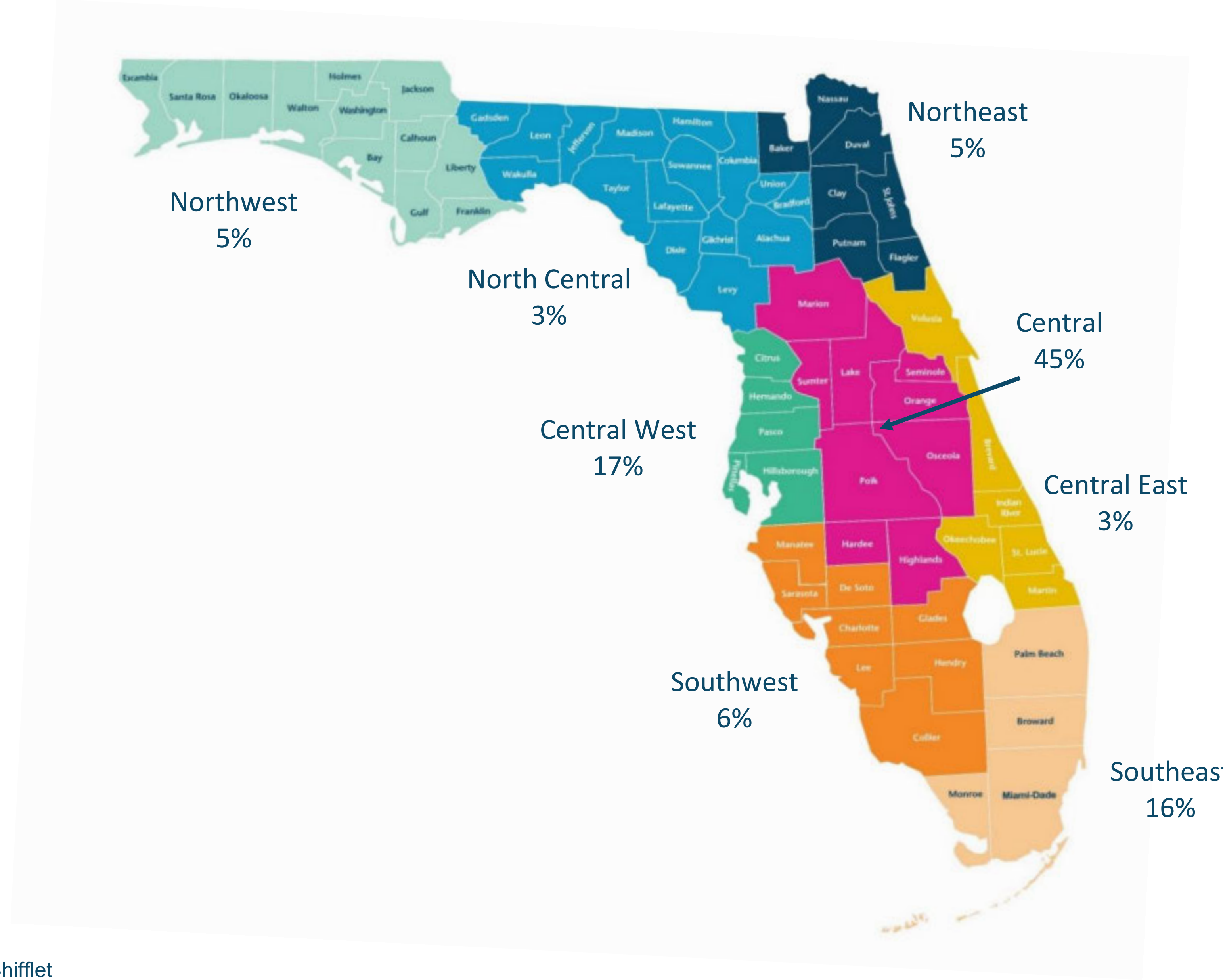
FLORIDA DESTINATION REGIONS

	2017	2018	2019	Change '19/'18
Central	41%	36%	45%	▲
Central West	14%	20%	17%	▼
Southeast	21%	18%	16%	▼
Southwest	3%	6%	6%	—
Northwest	4%	7%	5%	▼
Northeast	8%	8%	5%	▼
North Central	3%	1%	3%	▲
Central East	5%	4%	3%	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC BUSINESS VISITORS (CONTINUED)

FLORIDA DESTINATION REGIONS



Source: D.K. Shifflet

DOMESTIC BUSINESS VISITORS (CONTINUED)

TOP ORIGIN STATES

Georgia remained the top origin state for business visitors to Florida in 2019, though it share of visitors declined by 2.7 percentage points from the previous year. New York also saw a substantial decline in visitor share, as did California, Texas, and Pennsylvania. Meanwhile, South Carolina added 2.6 percentage points in visitor share to reach the fifth spot, while Ohio and Tennessee each added 3 percentage points.

Rank	State	2017	2018	2019	Change '19/'18
1	Georgia	13.5%	10.2%	7.5%	▼
2	New York	7.8%	7.8%	6.8%	▼
3	California	6.6%	6.9%	6.1%	▼
4	Alabama	2.7%	5.3%	5.6%	—
5	South Carolina	2.4%	2.7%	5.3%	▲
6	Texas	7.0%	5.9%	5.2%	▼
7	Pennsylvania	4.9%	5.7%	4.6%	▼
8	Ohio	4.0%	1.6%	4.6%	▲
9	Tennessee	3.0%	1.7%	4.6%	▲
10	New Jersey	3.5%	3.3%	4.5%	▲

TOP ORIGIN DESIGNATED MARKET AREAS (DMAs)

The loss of visitor share for the states of Georgia and New York in 2019 was reflected in losses for their largest DMAs. New York City saw its visitor share decline by 0.7 percentage points to 8.1%, but remained the top origin state for business visitors. Atlanta's decline was even more precipitious, with a loss of 1.8 percentage points. By contrast, Philadelphia gained 0.5 percentage points in visitor share to reach 4.6%.

Rank	DMA	2017	2018	2019	Change '19/'18
1	New York, NY	10.1%	8.8%	8.1%	▼
2	Atlanta, GA	8.7%	8.4%	6.6%	▼
3	Philadelphia, PA	3.9%	4.1%	4.6%	▲
4	Los Angeles, CA	3.5%	3.6%	3.7%	—
5	Chicago, IL	2.9%	3.3%	3.4%	—
6	Washington, DC	3.9%	3.3%	3.1%	—
7	Dallas-Fort Worth, TX	2.3%	2.6%	2.2%	—
8	Boston, MA	1.9%	2.1%	2.1%	—
9	Charlotte, NC	1.5%	1.9%	2.1%	—
10	Houston, TX	1.3%	1.9%	2.0%	—

Source: D.K. Shifflet; Arrows indicate change of at least 0.5 percentage points

DOMESTIC BUSINESS VISITORS (CONTINUED)

ACTIVITIES DURING TRIP

The percentage of visitors participating in business/work (32%) and culinary/dining experiences (27%) both saw significant increases in 2019 over the previous year, while nightlife reached a historic high of 15%. Shopping declined in popularity by 7 percentage points to 12%, its lowest point since 2009. Beach/waterfront activities declined for the third consecutive year to reach 21%, down from 23% in 2017.

Activity (Multiple Response)	2017	2018	2019	Change '19/'18
Business/Work	23%	22%	32%	▲
Culinary/Dining Experience	26%	21%	27%	▲
Beach/Waterfront	23%	22%	21%	—
Nightlife (bar, nightclub, etc.)	10%	12%	15%	▲
Shopping	13%	19%	12%	▼
Visit Friends/Relatives	7%	11%	12%	—
Theme/Amusement/Water Parks	9%	6%	7%	—
Touring/Sightseeing	6%	7%	6%	—
Live Music (festivals/concerts/clubs)	5%	5%	5%	—
Historic Sites	4%	5%	4%	—
Parks (national/state, etc.)	5%	4%	4%	—
Festivals/Fairs (state, craft, etc.)	3%	6%	3%	▼
Golfing	2%	4%	3%	—
Museums, Art Exhibits, etc.	2%	3%	3%	—
Spa	3%	3%	3%	—
Movies	3%	7%	2%	▼
Show: Boat, Car, Home	3%	4%	2%	▼
Professional Sports Event	1%	4%	2%	▼
Real Estate (buy/sell)	1%	3%	2%	—

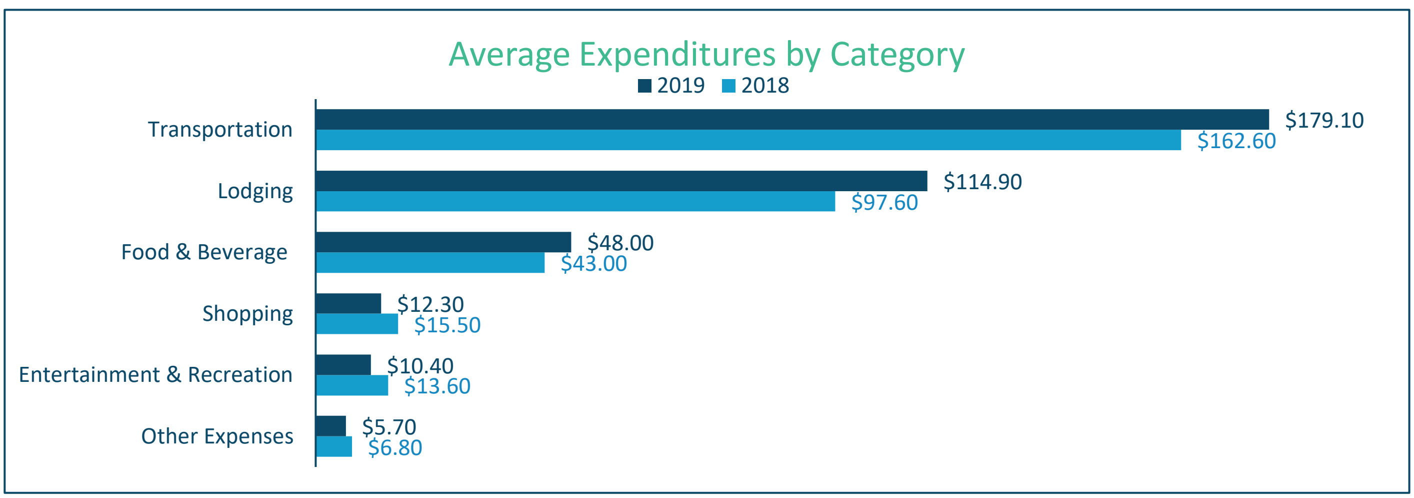
Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC BUSINESS VISITORS (CONTINUED)

AVERAGE EXPENDITURES PER PERSON PER DAY

The average daily expenditures of domestic business travelers increased at a significantly faster rate year-over-year (+12%) than those of leisure travelers (+3%), driven by rapid growth in spending on transportation (+16%), lodging (+18%), and food and beverage (+12%). The average expenditure on hotel rooms grew by +28% in 2019 to reach $124.90 per person per day, vastly outpacing the +1.1% statewide increase in Average Daily Rate reported by STR. While the average daily expenditure on airfare declined 13% in 2019 from the previous year, transportation expenditures overall trended in a positive direction due to an increase in spending on rental cars. Despite the growth in lodging and transporation, average expenditures on shopping and recreation and entertainment both declined.

	2017	2018	2019	Change '19/'18
Avg. Expenditures (incl. transportation)	**$240.80**	**$261.80**	**$294.00**	**12%**
Avg. Expenditures (excl. transportation)	**$149.30**	**$162.60**	**$179.10**	**10%**
Transportation - Total	$91.40	$99.20	$114.90	16%
Transportation - Total (excluding airfare)	*$36.80*	*$44.00*	*$40.90*	*-7%*
Transportation - Airfare	*$113.30*	*$119.00*	*$116.20*	-2%
Transportation - Rental Car	*$49.90*	*$48.20*	*$54.70*	13%
Transportation - Other (taxi, bus , gas, etc.)	*$19.20*	*$23.60*	*$19.10*	*-19%*
Lodging - Total	$83.90	$97.60	$114.90	*18%*
Lodging - Room	*$89.70*	*$97.20*	*$124.90*	*28%*
Lodging - Services (internet, parking, etc.)	*$9.30*	*$23.20*	*$14.10*	*-39%*
Food & Beverage	$43.50	$43.00	$48.00	12%
Shopping	$13.20	$15.50	$12.30	-21%
Entertainment & Recreation	$11.60	$13.60	$10.40	-24%
Other Expenses	$4.70	$6.80	$5.70	-16%



Source: D.K. Shifflet

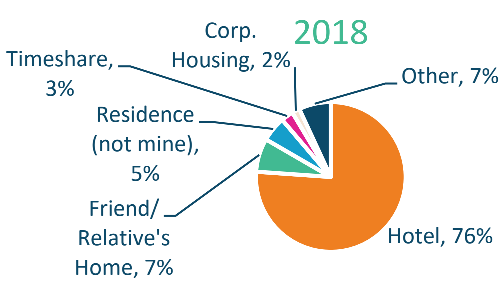
DOMESTIC BUSINESS VISITORS (CONTINUED)

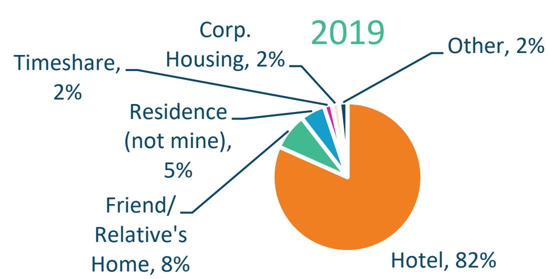
PAID VS. NON-PAID ACCOMMODATIONS

In 2019, the share of Florida's domestic business visitors staying in a paid accommodation was 93%. More than 4 out of every 5 business visitors stayed in a paid hotel room (82%) in 2019, but non-hotel paid accommodations gained share against them between 2017 and 2019. The percentage of business visitors staying in a non-hotel paid accommodation increaed by 2 percentage points to 11% between 2017 and 2018, and remained there in 2019.

	2017	2018	2019	Change '19/'18
Paid	**93%**	**87%**	**93%**	▲
Hotel Paid	*84%*	*77%*	*82%*	▲
Non-Hotel Paid	*9%*	*11%*	*11%*	—
Non-Paid	**7%**	**13%**	**7%**	▼

ACCOMMODATION TYPE





HOTEL LEVEL

More than half (57%) of domestic business travelers who stayed in a hotel in Florida in 2019 chose a high end property, up from 44% in 2018. This share came from mid-level hotels, a shift reflected in the 18% increase in average daily expenditure on hotels between 2018 and 2019.

	2017	2018	2019	Change '19/'18
High End	**45%**	**44%**	**57%**	▲
Luxury	5%	7%	8%	—
Upscale	40%	36%	50%	▲
Mid-Level	**45%**	**48%**	**35%**	▼
Upper Moderate	22%	20%	16%	▼
Moderate	23%	29%	19%	▼
Economy	**10%**	**8%**	**8%**	—
Lower Moderate	7%	3%	3%	—
Budget	3%	5%	5%	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC BUSINESS VISITORS (CONTINUED)

LENGTH OF STAY

Florida's domestic business visitors stayed an average of 3.1 nights in 2019, notably shorter than the average length of stay for all domestic visitors (4.2 nights). The shortest trips, those of 1-3 nights, became more common over the 3-year period between 2017 and 2019, while trips of 4-7 nights became less so.

	2017	2018	2019	Change '19/'18
1-3 nights	70%	73%	71%	▼
4-7 nights	26%	24%	24%	—
8+ nights	4%	2%	4%	▲
Average Nights in Florida	**3.1**	**2.8**	**3.1**	▲
Median Nights in Florida	**1.9**	**1.8**	**2.2**	▲

ACCOMMODATION RESERVATION TYPE

The percentage of domestic business visitors reserving an accommodation grew 5 percentage points to 95% between 2017 and 2019. Online reservation methods were behind the shift, as share of visitors using websites and apps grew from 44% in 2017 to 53% only three years later. Travel agents and direct reservations declined in popularity over the same period, falling 9 percentage points to 31% as online platforms have tapped in to a growing market of business travelers who prefer to plan their own trips.

	2017	2018	2019	Change '19/'18
Made Reservation	**90%**	**94%**	**95%**	—
Online	44%	54%	53%	—
Hotel Chain Website	*26%*	*26%*	*27%*	—
Travel Website	*15%*	*18%*	*20%*	▲
Hotel Mobile App	*3%*	*8%*	*5%*	▼
Non-Hotel Accommodations Site/App	*-*	*1%*	*1%*	—
Travel Agent/Corp. Travel Agent	18%	12%	14%	▲
Called Directly	12%	9%	7%	▼
As Part of a Package	10%	15%	15%	
Other	7%	4%	5%	—
No Reservation	**10%**	**6%**	**5%**	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC BUSINESS VISITORS (CONTINUED)

TRIP PLANNING TIME FRAME

Florida's business visitors were less likely to plan their travels within a month of departure in 2019 than they were in 2018, with 62% doing so in 2019 compared to 71% the previous year. The share of business visitors who began their planning 2-3 months in advance increased by 8 percentage to 27%, helping to drive the trend toward longer planning time frames in 2019.

	2017	2018	2019	Change '19/'18
1 Week or Less	24%	20%	19%	—
2-3 Weeks	27%	28%	24%	▼
1 Month	17%	23%	19%	▼
2-3 Months	24%	19%	27%	▲
4-5 Months	5%	4%	6%	▲
6 Months	3%	2%	2%	—
More Than 6 Months	1%	3%	4%	—

TRIP PLANNING RESOURCES USED

Two-thirds (67%) of Florida's domestic business visitors used a resource when planning their trip, with the most common resource used being past experience (25%). Online resources were used by a larger share of business visitors in 2019 than the previous year. Hotel chain websites were the most popular online resource with 25% of business visitors using at least one.

	2017	2018	2019	Change '19/'18
Used Resource	**67%**	**70%**	**67%**	▼
Past Experience	24%	27%	25%	▼
Hotel Chain Websites	17%	18%	21%	▲
Internet Search (Bing, Google, etc.)	16%	10%	14%	▲
Mapping Websites (Google Maps, etc.)	9%	8%	11%	▲
Friend/Family Recommendation	7%	14%	11%	▼
Travel Booking Website (Expedia, etc.)	7%	7%	10%	▲
Review Websites (TripAdvisor, Yelp, etc.)	5%	6%	8%	▲
Destination Websites	5%	5%	7%	▲
Attraction Websites	4%	3%	3%	—
Social Networking Sites (Facebook, etc.)	4%	4%	3%	—
No Resource Used	**33%**	**30%**	**33%**	▲

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC BUSINESS VISITORS (CONTINUED)

AGE OF ADULT TRAVELERS

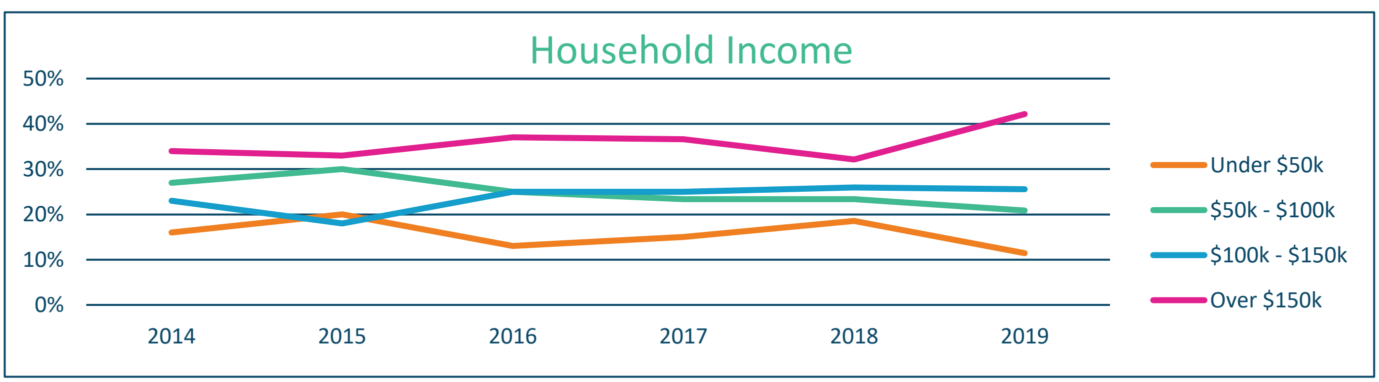
The share of domestic business travelers between the ages of 18 and 34 increased by 6 percentage points to 31% between 2017 and 2019, a trend driven by the large cohort of Millennials traveling for work as they become more established in their careers. Many older professionals are choosing to stay in the workforce, bolstering the share of those 65 and over who took business trips to Florida in the 3-year period between 2017 and 2019.

	2017	2018	2019	Change '19/'18
18 - 34 Years Old	25%	28%	31%	▲
35 - 49 Years Old	40%	40%	35%	▼
50 - 64 Years Old	29%	24%	25%	—
65+ Years Old	6%	9%	9%	—
Average Age	**45.0**	**44.9**	**44.5**	▼
Median Age	**45**	**44**	**43**	▼

HOUSEHOLD INCOME

In 2019, Florida's domestic business visitors had an average median income 39.0% higher than domestic visitors overall. The annualincrease in median household income in 2019 was driven by an increase in the share of visitors earning $150,000 or more annually.

	2017	2018	2019	Change '19/'18
Under $50,000	15%	19%	11%	▼
$50,000 - $74,999	10%	10%	10%	—
$75,000 - $99,999	13%	13%	11%	▼
$100,000 - $149,999	25%	26%	26%	—
$150,000+	37%	32%	42%	▲
Average	**$142,251**	**$133,402**	**$149,151**	12%
Median	**$122,736**	**$117,031**	**$134,459**	15%



Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC BUSINESS VISITORS (CONTINUED)

GENERATION

Millennial and Gen Z travelers acounted for 42% of Florida's domestic business visitors in 2019, a 7 percentage point increase from 2019. This made them the largest generational cohort, overtaking Gen X travelers who declined 5 percentage points to 32% of the total.

	2017	2018	2019	Change '19/'18
Millennials/Gen Z (1981 to 1997)	31%	35%	42%	▲
GenX (1965-1980)	41%	37%	32%	▼
Boomers (1946 -1964)	27%	27%	24%	▼
Silent/GI (1945 or earlier)	1%	1%	2%	—

LIFESTAGE

Florida's business visitors in 2019 were younger and more affluent on average than leisure visitors, but were about equally as likely to have children at home. Young & Free visitors accounted for 24% of business visitors, compared to 15% of leisure visitors. The share of visitors who were Young & Free also saw a notable increase of 7 percentage points between 2018 and 2019, while the share of visitors with Young Families and Moderate Families declined.

	2017	2018	2019	Change '19/'18
Young & Free (18-34; any income; no kids)	17%	17%	24%	▲
Young Family (18-34; any income; kids in HH)	9%	12%	8%	▼
Maturing & Free (35-54; any income; no kids)	23%	17%	19%	▲
Moderate Family (35-54; <$75K; kids in HH)	7%	7%	3%	▼
Affluent Family (35-54; $75K+; kids in HH)	23%	24%	22%	▼
Moderate Mature (55 or older, <$100K; no kids)	5%	8%	5%	▼
Affluent Mature (55 or older; $100K+, no kids)	16%	16%	19%	▲

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

PROFILE OF DOMESTIC VISITORS TO FLORIDA BY VACATION REGION

Prepared by VISIT FLORIDA

Research Department

DOMESTIC VISITORS BY VACATION REGION

CENTRAL REGION:

> Visitors to the Central vacation region were younger on average than visitors to any other region in 2019, with an average age of 46 years. They also tended to be more affluent, with an average household income of $121,000. Visitors to the Central region stayed in paid accommodations (81%) and flew to Florida (46%) at higher rates than domestic visitors overall, contributing to these visitors having the highest average per person, per day expenditures in the state ($198.30). While visiting theme/amusement/water parks (46%) was the most popular activity for visitors to the region in 2019, the share visiting friends and relatives grew 3 percentage points from the year prior to reach 26%.

CENTRAL EAST REGION:

> Leisure visitors accounted for 97% of all visitors to the Central East region in 2019, with vacation/getaway weekends (46%) being the most common purpose for such trips. The average length of stay for visitors to the region reached 4.7 nights in 2019, the second-longest among regions in the state. The Central East region was popular with visitors from nearby states in 2019, with Georgia and the Carolinas accounting for a third (33%) of all visitors. Regardless of where they came from, visitors to the region were most likely to be found visiting the beach/waterfront (63%), spending time with friends/relatives (53%), and enjoying culinary/dining experiences (35%) during their stay.

CENTRAL WEST REGION:

> The average age of visitors to the Central West region was 50 years in 2019, with just under half (45%) of visitors being 55 or older. More than half of visitors (51%) traveled alone, and 10% were business travelers. The Central West region had a comparably larger share of visitors staying in non-paid accommodations (44%) than other regions, in part reflecting the popularity of visiting friends/relatives (37% reported it as their primary purpose of trip). Other popular activities in 2019 included visiting the beach/waterfront (45%), culinary/dining experiences (31%), and shopping (23%). Spring was the most common month for visitors to travel to the Central West region, accounting for 31% of the annual total.

NORTH CENTRAL REGION:

> The North Central region had a higher percentage of travelers visiting for business than any other region (15%) in 2019, and fewer travel parties included children (5%). Nearly two-thirds (63%) of visitors to the North Central region visited in Winter and Fall, with Summer being the slowest season (8%). Eighty-eight percent of visitors drove or took a means other than air travel to the region, and the top 4 origin states were all in the Southeast (Georgia, North Carolina, Arkansas, Alabama). Average party size (1.7) and length of stay (2.3 nights) were both relatively small compared to other regions. While in destination, North Central visitors were most likely to be visiting friends/relatives (32%), having culinary/dining experiences (20%), visiting state/national parks (14%), and participating in or attending amateur sports events.

NORTHEAST REGION:

> Summer was the most popular season for visitors to the Northeast region in 2019, accounting for 42% of the annual total. Nearly half (46%) of visitors came from Georgia, North Carolina, and Texas, and only 23% traveled to the region by air. Forty percent of visitors to the region stayed in a non-paid accommodation, a larger share than either hotel (32%) or non-hotel (28%) paid accommodations. Mid-level properties were preferred by visitors who stayed in hotels (65%). Visiting the beach/waterfront was the most popular activity in 2019, followed by visiting friends/relatives (46%), visiting historical sights (25%), and shopping (25%).

NORTHWEST REGION:

> A larger share of visitors to the Northwest region traveled to the area for a vacation or getaway weekend (70%) than in any other region in 2019. Fully half (50%) of visitors to the region came during the summer, with the vast majority arriving by car or other non-air means (91%). The top 5 origin states in 2019 were all in the South and easily accessible by car: Tennessee (17%), Texas (14%), Georgia (12%), Alabama (12%), and Louisiana (8%). Visitors to the Northwest region tended to favor non-hotel paid accommodations (44%) to a greater extent than in other regions, and they were also more likely to travel with children (32%). Popular activities for visitors in 2019 included going to the beach/waterfront (82%), enjoying culinary/dining experiences (40%), and shopping (39%).

SOUTHEAST REGION:

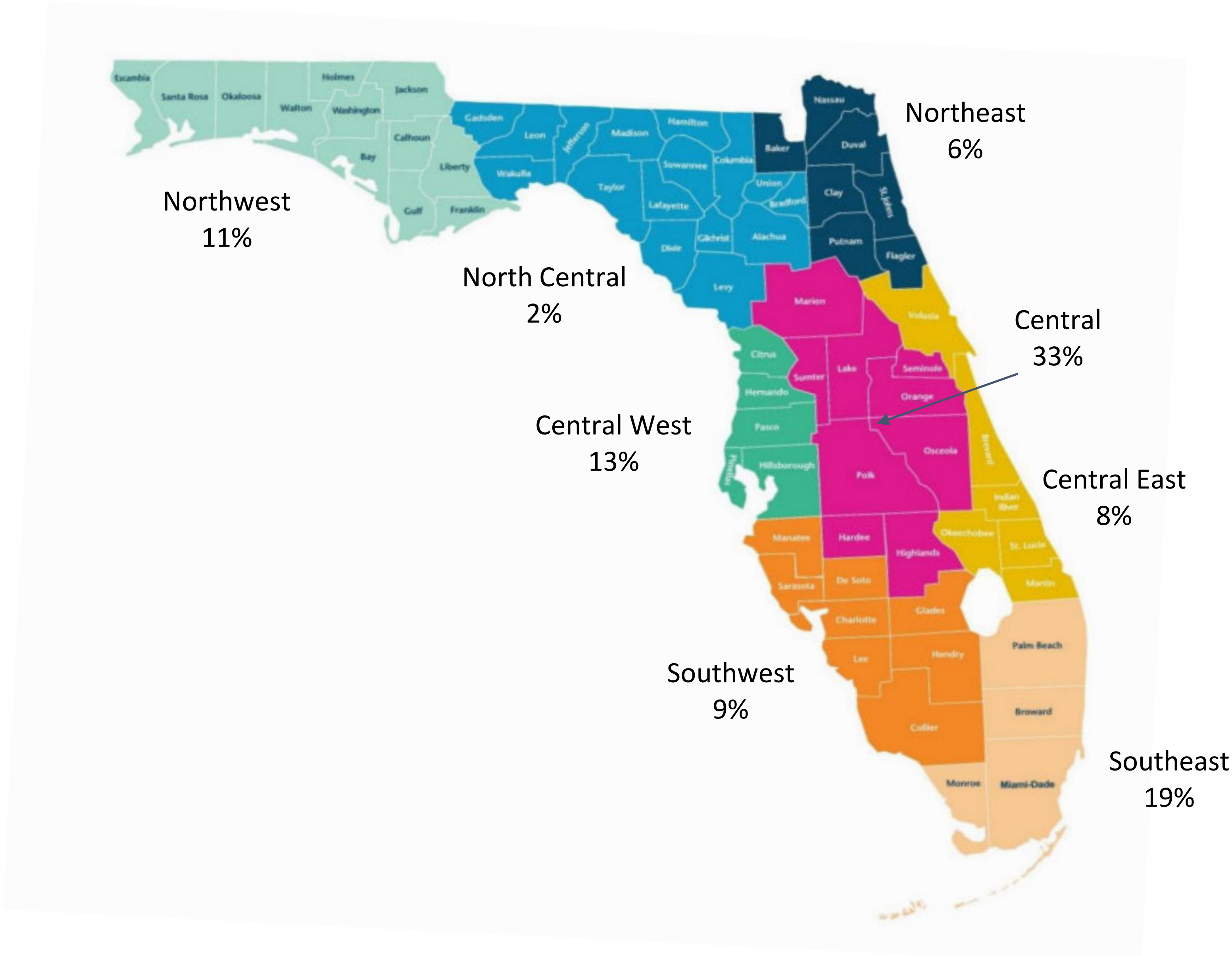
- The Southeast region drew more affluent visitors than any other region in 2019, with the average visitor having a household income of $132,600. Visitors to the region also spent more per person per day, with an average of $194.30. Forty-two percent stayed in a paid hotel, of which more than half (52%) opted for a high-end property. New York (16%) and Pennsylvania (10%) were the top origin states in 2019, while other northern states such as New Jersey (6%) and Massachusetts (5%) also accounted for a substantial share of visitors. More than 2-in-5 visitors (41%) chose to travel to the region by air. Going to the beach/waterfront was the most common activity for visitors (57%), followed by culinary/dining experiences (34%), shopping (31%), and visiting friends/relatives (30%).

SOUTHWEST REGION:

- Visitors to the Southwest region were older on average than those who traveled to other parts of the state in 2019, with an average age of 54 years. They also stayed longer on average (5.6 nights), as 64% stayed in destination more than 3 nights. Winter (31%) and Spring (30%) were the busiest seasons, accounting 61% of annual visitors. New York (11%), Ohio (10%), and Michigan (7%) were the top 3 origin states in 2019, with a combined 28% of visitors hailing from one of these 3 states known for their tough winters. Slightly less than half (47%) of visitors traveled to the Southwest region in a travel party consisting of one male and one female, while 41% were solo adults and 10% traveled with children. In 2019, going to the beach/waterfront was the top activity, followed by visiting friends/relatives (43%), and culinary/dining experiences (42%).

DOMESTIC VACATION REGIONS

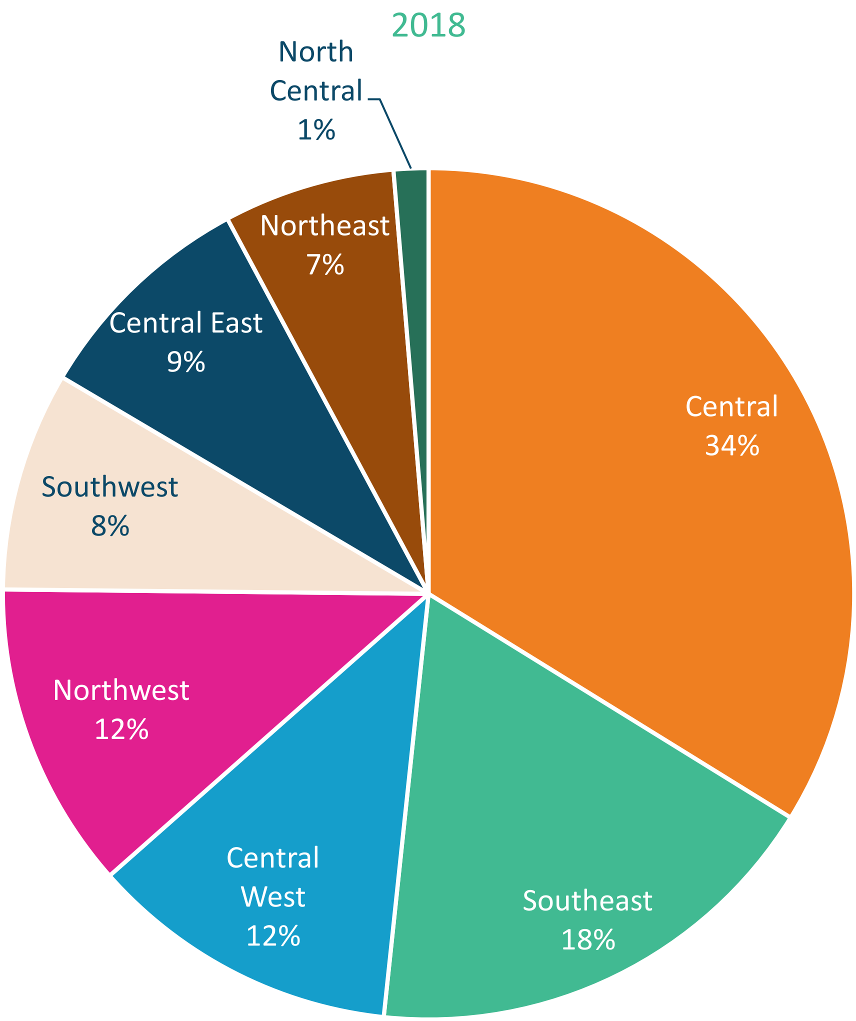
SHARE OF 2019 DOMESTIC VISITORS BY VACATION REGION

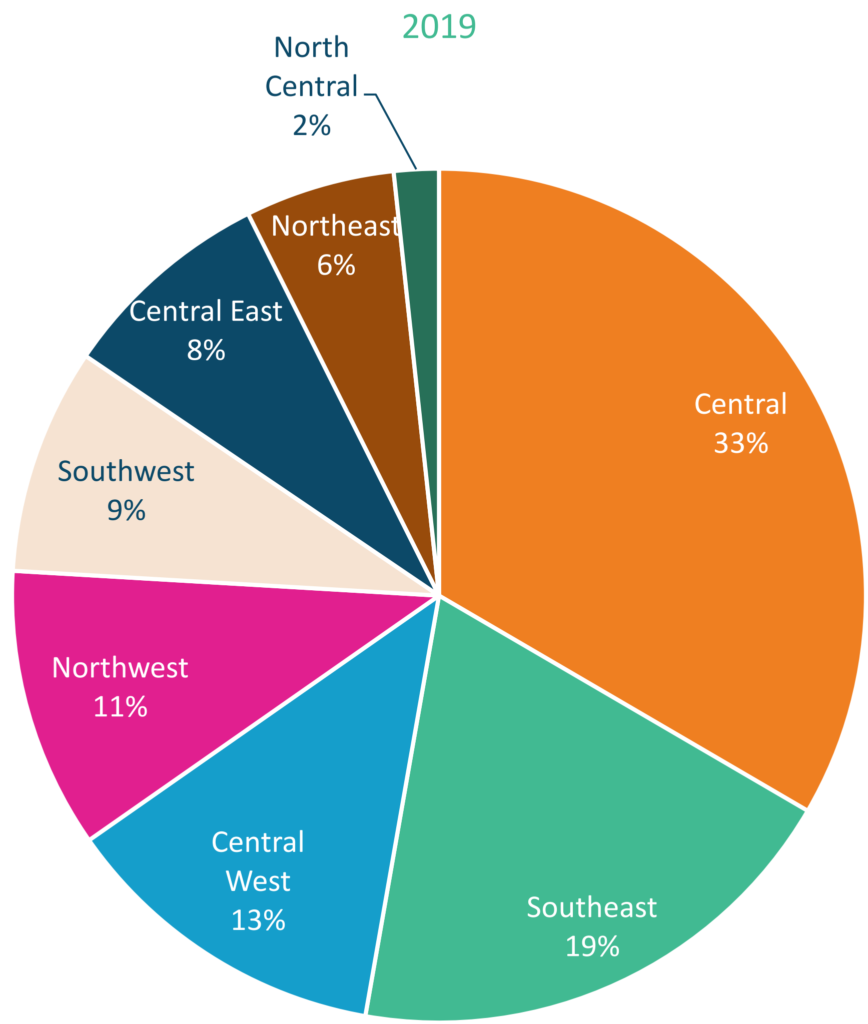


Source: D.K. Shifflet

DOMESTIC VISITORS BY VACATION REGION

REGIONAL SHARE OF DOMESTIC VISITORS





Source: D.K. Shifflet

DOMESTIC VISITORS TO CENTRAL FL

The Central Vacation Region is made up of the following counties: Hardee, Highlands, Lake, Marion, Orange, Osceola, Polk, Seminole, and Sumter. Welcome to the Theme Park Capital of the World and the global source for Florida citrus.

PRIMARY PURPOSE OF TRIP

	2017	2018	2019	Change '19/'18
Leisure	**88%**	**91%**	**90%**	—
Vacation/Getaway Weekend	55%	64%	58%	▼
Visit Friends/Relatives	15%	14%	18%	▲
Other Leisure	18%	13%	14%	—
Business	**13%**	**10%**	**10%**	—
Group Meetings	9%	7%	7%	—
Transient Business	4%	3%	3%	—

TRANSPORTATION TYPE

	2017	2018	2019	Change '19/'18
Air	43%	41%	46%	▲
Non-Air	57%	59%	54%	▼

SEASONALITY

	2017	2018	2019	Change '19/'18
Winter (Dec, Jan, Feb)	22%	25%	27%	▲
Spring (Mar, Apr, May)	29%	23%	27%	▲
Summer (Jun, Jul, Aug)	28%	30%	25%	▼
Fall (Sept, Oct, Nov)	21%	22%	21%	—

TRAVEL PARTY COMPOSITION

	2017	2018	2019	Change '19/'18
One Male and One Female	30%	32%	34%	▲
One Adult	34%	26%	30%	▲
Families	23%	29%	26%	▼
Three or More Adults	8%	6%	6%	—
Two Males and Two Females	5%	7%	5%	▼
Average Party Size	**2.3**	**2.4**	**2.3**	▼

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO CENTRAL FL

TOP ORIGIN STATES

	2017	2018	2019	Change '19/'18
New York	8.0%	10.2%	10.2%	—
Illinois	3.3%	6.4%	5.9%	▼
New Jersey	5.2%	5.5%	5.7%	—
Georgia	8.7%	9.5%	5.4%	▼
Ohio	5.4%	3.9%	5.4%	▲

TOP ORIGIN DESIGNATED MARKET AREAS (DMAs)

	2017	2018	2019	Change '19/'18
New York, NY	10.5%	11.1%	11.4%	—
Philadelphia, PA	4.8%	4.6%	5.4%	▲
Chicago, IL	3.4%	5.0%	5.4%	—
Atlanta, GA	6.4%	7.8%	3.8%	▼
Boston, MA	2.7%	2.7%	3.4%	▲

ACTIVITIES DURING TRIP

Activity (Multiple Response)	2017	2018	2019	Change '19/'18
Theme/Amusement/Water Parks	39%	49%	46%	▼
Shopping	30%	34%	32%	▼
Culinary/Dining Experience	29%	28%	28%	—
Visit Friends/Relatives	24%	23%	26%	▲
Beach/Waterfront	16%	16%	14%	▼
Touring/Sightseeing	14%	14%	14%	—

LENGTH OF STAY

	2017	2018	2019	Change '19/'18
1-3 nights	41%	40%	42%	▲
4-7 nights	51%	53%	50%	▼
8+ nights	9%	8%	8%	—
Average Nights in Florida	**4.5**	**4.5**	**4.5**	—
Median Nights in Florida	**3.1**	**3.3**	**3.2**	▼

Source: D.K. Shifflet; Arrows indicate change of at least 0.5 percentage points for origin data and at least 2 percentage points for other data; profile based on small sample size

DOMESTIC VISITORS TO CENTRAL FL

PAID VS. NON-PAID ACCOMMODATIONS

	2017	2018	2019	Change '19/'18
Paid	**82%**	**82%**	**81%**	—
Hotel Paid	57%	54%	51%	▼
Non-Hotel Paid	24%	28%	31%	▲
Non-Paid	**18%**	**18%**	**19%**	—

HOTEL LEVEL

	2017	2018	2019	Change '19/'18
High End	**51%**	**50%**	**48%**	▼
Luxury	12%	14%	16%	▲
Upscale	39%	36%	32%	▼
Mid-Level	**39%**	**39%**	**41%**	▲
Upper Moderate	16%	14%	18%	▲
Moderate	22%	25%	23%	▼
Economy	**10%**	**11%**	**10%**	—
Lower Moderate	5%	6%	7%	—
Budget	5%	4%	3%	—

ACCOMMODATION RESERVATION TYPE

	2017	2018	2019	Change '19/'18
Made Reservation	**96%**	**97%**	**96%**	—
Online	41%	47%	44%	▼
Hotel Chain Website	*28%*	*28%*	*24%*	▼
Travel Website	*12%*	*11%*	*12%*	—
Non-Hotel Accommodations Site/App	-	*4%*	*6%*	▲
Hotel Mobile App	*1%*	*4%*	*3%*	—
Called Directly	17%	17%	17%	—
As Part of a Package	24%	26%	26%	—
Travel Agent	4%	3%	2%	—
Other	10%	5%	8%	▲
No Reservation	**4%**	**3%**	**4%**	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO CENTRAL FL

TRIP PLANNING TIME FRAME

	2017	2018	2019	Change '19/'18
Less than 1 week	6%	4%	6%	▲
1-3 weeks	15%	13%	13%	—
1 month	14%	17%	17%	—
2-3 months	30%	27%	29%	▲
4-5 months	12%	14%	10%	▼
6 months or more	24%	24%	25%	—

TRIP PLANNING RESOURCES USED

	2017	2018	2019	Change '19/'18
Used Resource	**80%**	**80%**	**82%**	—
Past Experience	35%	34%	36%	▲
Internet Search	19%	16%	20%	▲
Friend/Family Recommendation	19%	14%	19%	▲
Hotel Chain Websites	16%	15%	19%	▲
Attraction Websites	18%	19%	17%	▼
No Resource Used	**20%**	**20%**	**18%**	▼

AVERAGE EXPENDITURES PER PERSON PER DAY

	2017	2018	2019	Change '19/'18
Avg. Expenditures (incl. transportation)	**$172.60**	**$175.00**	**$198.30**	**13%**
Avg. Expenditures (excl. transportation)	**$125.50**	**$129.20**	**$150.00**	**16%**
Transportation - Total	$47.00	$45.70	$48.30	6%
Transportation - Total (excluding airfare)	*$23.10*	*$24.50*	*$23.50*	*-4%*
Transportation - Airfare	*$59.70*	*$55.70*	*$55.80*	*0%*
Transportation - Rental Car	*$36.40*	*$34.60*	*$41.60*	*20%*
Transportation - Other (taxi, bus , gas, etc.)	*$13.10*	*$13.40*	*$11.70*	*-13%*
Lodging - Total	$45.00	$49.40	$67.50	37%
Lodging - Room	*$55.40*	*$60.10*	*$78.40*	*30%*
Lodging - Services (internet, parking, etc.)	*$8.50*	*$14.20*	*$16.50*	*16%*
Food & Beverage	$37.90	$38.60	$41.50	8%
Entertainment & Recreation	$27.30	$29.40	$31.70	8%
Shopping	$19.60	$17.30	$20.30	17%
Other Expenses	$4.60	$4.20	$5.00	19%

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS TO CENTRAL FL

AGE OF ADULT TRAVELERS

	2017	2018	2019	Change '19/'18
18 - 34 Years Old	26%	21%	28%	▲
35 - 49 Years Old	34%	42%	34%	▼
50 - 64 Years Old	22%	23%	22%	—
65+ Years Old	18%	15%	17%	▲
Average Age	**46.7**	**47.2**	**46.4**	▼
Median Age	**45**	**45**	**44**	▼

HOUSEHOLD INCOME

	2017	2018	2019	Change '19/'18
Under $50,000	17%	19%	18%	—
$50,000 - $74,999	15%	18%	15%	▼
$75,000 - $99,999	17%	18%	15%	▼
$100,000 - $149,999	25%	23%	23%	—
Over $150,000	23%	23%	28%	▲
Average Household Income	**$119,600**	**$110,600**	**$121,000**	▲
Median Household Income	**$97,500**	**$93,600**	**$103,200**	▲

GENERATION

	2017	2018	2019	Change '19/'18
Millennials/Gen Z (Born 1981 to 1997)	28%	30%	35%	▲
GenX (Born 1965-1980)	38%	38%	36%	▼
Boomers (Born 1946 -1964)	30%	29%	26%	▼
Silent/GI (Born 1945 or earlier)	4%	3%	3%	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO CENTRAL EAST FL

The Central East Vacation Region is made up of the following counties: Brevard, Indian River, Martin, Okeechobee, St. Lucie, and Volusia. Launchpad for space flight. Winter oasis for baseball. Treasure Coast for beach lovers and salt-water anglers.

PRIMARY PURPOSE OF TRIP

	2017	2018	2019	Change '19/'18
Leisure	**93%**	**95%**	**97%**	▲
Vacation/Getaway Weekend	42%	52%	46%	▼
Visit Friends/Relatives	33%	27%	37%	▲
Other Leisure	18%	16%	14%	▼
Business	**7%**	**5%**	**3%**	▼
Group Meetings	3%	2%	2%	—
Transient Business	4%	3%	1%	▼

TRANSPORTATION TYPE

	2017	2018	2019	Change '19/'18
Air	19%	16%	26%	▲
Non-Air	81%	84%	74%	▼

SEASONALITY

	2017	2018	2019	Change '19/'18
Winter (Dec, Jan, Feb)	26%	21%	26%	▲
Spring (Mar, Apr, May)	32%	31%	26%	▼
Summer (Jun, Jul, Aug)	27%	28%	25%	▼
Fall (Sept, Oct, Nov)	15%	20%	23%	▲

TRAVEL PARTY COMPOSITION

	2017	2018	2019	Change '19/'18
One Male and One Female	50%	37%	39%	▲
One Adult	31%	27%	37%	▲
Families	9%	24%	13%	▼
Three or More Adults	5%	6%	6%	—
Two Males or Two Females	4%	5%	5%	—
Average Party Size	**2.0**	**2.4**	**2.0**	▼

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO CENTRAL EAST FL

TOP ORIGIN STATES

	2017	2018	2019	Change '19/'18
Georgia	10.2%	19.1%	14.6%	▼
North Carolina	10.4%	3.5%	13.0%	▲
New York	9.7%	9.9%	7.9%	▼
Michigan	4.4%	2.0%	7.5%	▲
South Carolina	2.5%	3.2%	4.9%	▲

TOP ORIGIN DESIGNATED MARKET AREAS (DMAs)

	2017	2018	2019	Change '19/'18
New York, NY	8.3%	6.3%	10.9%	▲
Atlanta, GA	7.5%	18.2%	7.8%	▼
Raleigh-Durham, NC	1.4%	1.3%	7.5%	▲
Detroit, MI	2.3%	1.2%	5.2%	▲
Charlotte, NC	0.8%	0.5%	3.9%	▲

ACTIVITIES DURING TRIP

Activity (Multiple Response)	2017	2018	2019	Change '19/'18
Beach/Waterfront	59%	59%	63%	▲
Visit Friends/Relatives	38%	44%	53%	▲
Culinary/Dining Experience	37%	29%	35%	▲
Shopping	26%	32%	27%	▼
Touring/Sightseeing	21%	15%	16%	—
Parks (national/state etc.)	9%	11%	13%	▲

LENGTH OF STAY

	2017	2018	2019	Change '19/'18
1-3 nights	47%	59%	43%	▼
4-7 nights	46%	32%	46%	▲
8+ nights	8%	9%	12%	▲
Average Nights in Florida	**4.3**	**4.1**	**4.7**	▲
Median Nights in Florida	**2.9**	**2.7**	**3.5**	▲

Source: D.K. Shifflet; Arrows indicate change of at least 0.5 percentage points for origin data and at least 2 percentage points for other data; profile based on small sample size

DOMESTIC VISITORS TO CENTRAL EAST FL

PAID VS. NON-PAID ACCOMMODATIONS

	2017	2018	2019	Change '19/'18
Paid	**63%**	**68%**	**57%**	▼
Hotel Paid	42%	36%	28%	▼
Non-Hotel Paid	20%	31%	29%	▼
Non-Paid	**37%**	**32%**	**43%**	▲

HOTEL LEVEL

	2017	2018	2019	Change '19/'18
High End	**30%**	**27%**	**30%**	▲
Luxury	1%	3%	1%	▼
Upscale	29%	25%	29%	▲
Mid-Level	**57%**	**61%**	**57%**	▼
Upper Moderate	19%	19%	19%	—
Moderate	38%	41%	38%	▼
Economy	**13%**	**12%**	**13%**	—
Lower Moderate	6%	7%	6%	—
Budget	7%	5%	7%	▲

ACCOMMODATION RESERVATION TYPE

	2017	2018	2019	Change '19/'18
Made Reservation	**90%**	**96%**	**93%**	▼
Online	47%	54%	49%	▼
Hotel Chain Website	*27%*	*28%*	*30%*	▲
Travel Website	*13%*	*16%*	*11%*	▼
Non-Hotel Accommodations Site/App	-	*7%*	*5%*	▼
Hotel Mobile App	*7%*	*3%*	*3%*	—
Called Directly	15%	18%	29%	▲
As Part of a Package	11%	11%	8%	▼
Travel Agent	2%	2%	5%	▲
Other	16%	12%	2%	▼
No Reservation	**10%**	**4%**	**7%**	▲

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO CENTRAL EAST FL

TRIP PLANNING TIME FRAME

	2017	2018	2019	Change '19/'18
Less than 1 week	11%	3%	4%	—
1-3 weeks	26%	15%	12%	▼
1 month	17%	13%	18%	▲
2-3 months	23%	29%	38%	▲
4-5 months	5%	12%	8%	▼
6 months or more	19%	29%	18%	▼

TRIP PLANNING RESOURCES USED

	2017	2018	2019	Change '19/'18
Used Resource	**80%**	**82%**	**82%**	—
Past Experience	33%	39%	47%	▲
Friend/Family/Colleague Recommendation	21%	21%	23%	▲
Hotel Chain Websites	23%	10%	17%	▲
Internet Search	22%	16%	11%	▼
Travel Booking Website (Expedia, etc.)	7%	7%	8%	—
No Resource Used	**20%**	**18%**	**18%**	—

AVERAGE EXPENDITURES PER PERSON PER DAY

	2017	2018	2019	Change '19/'18
Avg. Expenditures (incl. transportation)	**$130.90**	**$117.90**	**$119.30**	**1%**
Avg. Expenditures (excl. transportation)	**$96.80**	**$89.70**	**$87.40**	**-3%**
Transportation - Total	$34.10	$28.20	$31.90	13%
Transportation - Total (excl. airfare)	*$22.20*	*$20.30*	*$20.80*	*2%*
Transportation - Airfare	*$53.80*	*$34.00*	*$40.20*	*18%*
Transportation - Rental Car	*$37.40*	*$33.00*	*$36.00*	*9%*
Transportation - Other (taxi, gas, etc.)	*$12.90*	*$12.50*	*$13.50*	*8%*
Lodging - Total	$47.50	$53.50	$43.20	-19%
Lodging - Room	*$65.40*	*$73.70*	*$54.10*	*-27%*
Lodging - Services (internet, etc.)	*$0.90*	*$7.00*	*$5.80*	*-17%*
Food & Beverage	$34.10	$27.00	$31.00	15%
Entertainment & Recreation	$13.00	$12.80	$15.20	19%
Shopping	$21.20	$13.30	$15.00	13%
Other Expenses	$3.50	$3.40	$3.90	15%

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO CENTRAL EAST FL

AGE OF ADULT TRAVELERS

	2017	2018	2019	Change '19/'18
18 - 34 Years Old	13%	24%	18%	▼
35 - 49 Years Old	21%	24%	19%	▼
50 - 64 Years Old	37%	24%	37%	▲
65+ Years Old	29%	28%	27%	—
Average Age	**54.3**	**51.8**	**52.9**	▲
Median Age	**57**	**52**	**55**	▲

HOUSEHOLD INCOME

	2017	2018	2019	Change '19/'18
Under $50,000	22%	23%	35%	▲
$50,000 - $74,999	18%	16%	19%	▲
$75,000 - $99,999	16%	15%	12%	▼
$100,000 - $149,999	28%	23%	16%	▼
Over $150,000	16%	23%	18%	▼
Average Household Income	**$108,500**	**$107,800**	**$96,700**	▼
Median Household Income	**$90,600**	**$92,100**	**$71,400**	▼

GENERATION

	2017	2018	2019	Change '19/'18
Millennials/Gen Z (Born 1981 to 1997)	16%	28%	22%	▼
GenX (Born 1965-1980)	22%	25%	26%	—
Boomers (Born 1946 -1964)	55%	37%	46%	▲
Silent/GI (Born 1945 or earlier)	7%	9%	6%	▼

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO CENTRAL WEST FL

The Central West Vacation Region is made up of the following counties: Citrus, Hernando, Hillsborough, Pasco, and Pinellas. Miles of Gulf beaches. Meccas for cyclists, skydivers, and manatees.

PRIMARY PURPOSE OF TRIP

	2017	2018	2019	Change '19/'18
Leisure	**88%**	**86%**	**90%**	▲
Vacation/Getaway Weekend	32%	36%	39%	▲
Visit Friends/Relatives	34%	36%	37%	—
Other Leisure	22%	14%	14%	—
Business	**12%**	**14%**	**10%**	▼
Group Meetings	6%	7%	6%	—
Transient Business	6%	7%	4%	▼

TRANSPORTATION TYPE

	2017	2018	2019	Change '19/'18
Air	37%	38%	41%	▲
Non-Air	63%	62%	59%	▼

SEASONALITY

	2017	2018	2019	Change '19/'18
Winter (Dec, Jan, Feb)	25%	30%	26%	▼
Spring (Mar, Apr, May)	31%	26%	31%	▲
Summer (Jun, Jul, Aug)	24%	25%	23%	▼
Fall (Sept, Oct, Nov)	20%	19%	20%	—

TRAVEL PARTY COMPOSITION

	2017	2018	2019	Change '19/'18
One Adult	38%	48%	51%	▲
One Male and One Female	41%	34%	31%	▼
Families	9%	7%	11%	▲
Three or More Adults	7%	6%	4%	▼
Two Males or Two Females	6%	5%	3%	▼
Average Party Size	**1.9**	**1.8**	**1.7**	▼

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO CENTRAL WEST FL

TOP ORIGIN STATES

	2017	2018	2019	Change '19/'18
New York	8.9%	10.2%	11.2%	▲
Ohio	5.8%	6.8%	10.8%	▲
Georgia	10.0%	7.4%	8.5%	▲
Indiana	2.1%	1.8%	5.5%	▲
Michigan	2.8%	4.7%	5.2%	▲

TOP ORIGIN DESIGNATED MARKET AREAS (DMAs)

	2017	2018	2019	Change '19/'18
New York, NY	8.1%	7.5%	10.7%	▲
Atlanta, GA	8.4%	5.0%	7.5%	▲
Cleveland-Akron, OH	2.3%	2.7%	7.0%	▲
Indianapolis, IN	0.5%	0.6%	5.1%	▲
Boston, MA	2.1%	1.3%	3.8%	▲

ACTIVITIES DURING TRIP

Activity (Multiple Response)	2017	2018	2019	Change '19/'18
Visit Friends/Relatives	47%	41%	49%	▲
Beach/Waterfront	46%	46%	45%	—
Culinary/Dining Experience	33%	33%	31%	▼
Shopping	21%	23%	23%	—
Nightlife	15%	15%	19%	▲
Touring/Sightseeing	12%	13%	12%	—

LENGTH OF STAY

	2017	2018	2019	Change '19/'18
1-3 nights	63%	60%	64%	▲
4-7 nights	31%	28%	30%	▲
8+ nights	6%	12%	6%	▼
Average Nights in Florida	**3.6**	**4.1**	**3.6**	▼
Median Nights in Florida	**3.1**	**3.1**	**3.1**	▲

Source: D.K. Shifflet; Arrows indicate change of at least 0.5 percentage points for origin data and at least 2 percentage points for other data; profile based on small sample size

DOMESTIC VISITORS TO CENTRAL WEST FL

PAID VS. NON-PAID ACCOMMODATIONS

	2017	2018	2019	Change '19/'18
Paid	**61%**	**59%**	**56%**	▼
Hotel Paid	43%	42%	39%	▼
Non-Hotel Paid	16%	17%	17%	—
Non-Paid	**39%**	**41%**	**44%**	▲

HOTEL LEVEL

	2017	2018	2019	Change '19/'18
High End	**33%**	**40%**	**43%**	▲
Luxury	1%	7%	8%	—
Upscale	31%	33%	36%	▲
Mid-Level	**53%**	**42%**	**44%**	▲
Upper Moderate	14%	17%	15%	▼
Moderate	39%	25%	29%	▲
Economy	**15%**	**19%**	**13%**	▼
Lower Moderate	8%	5%	11%	▲
Budget	7%	14%	3%	▼

ACCOMMODATION RESERVATION TYPE

	2017	2018	2019	Change '19/'18
Made Reservation	**92%**	**90%**	**90%**	—
Online	60%	50%	57%	▲
Hotel Chain Website	*30%*	*25%*	*31%*	▲
Travel Website	*23%*	*17%*	*20%*	▲
Hotel Mobile App	*7%*	*6%*	*3%*	▼
Non-Hotel Accommodations Site/App	*-*	*2%*	*3%*	—
As Part of a Package	5%	8%	12%	▲
Called Directly	17%	21%	12%	▼
Travel Agent	1%	1%	1%	—
Other	9%	9%	9%	—
No Reservation	**8%**	**10%**	**10%**	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO CENTRAL WEST FL

TRIP PLANNING TIME FRAME

	2017	2018	2019	Change '19/'18
Less than 1 week	10%	7%	7%	—
1-3 weeks	21%	17%	30%	▲
1 month	17%	21%	18%	▼
2-3 months	30%	32%	30%	▼
4-5 months	10%	12%	7%	▼
6 months or more	13%	10%	9%	—

TRIP PLANNING RESOURCES USED

	2017	2018	2019	Change '19/'18
Used Resource	**76%**	**71%**	**76%**	▲
Past Experience	34%	37%	35%	▼
Friend/Family/Colleague Recommendation	25%	14%	25%	▲
Internet Search	17%	17%	13%	▼
Hotel Chain Websites	14%	8%	11%	▲
Travel Booking Website (Expedia, etc.)	13%	5%	8%	▲
No Resource Used	**24%**	**29%**	**24%**	▼

AVERAGE EXPENDITURES PER PERSON PER DAY

	2017	2018	2019	Change '19/'18
Avg. Expenditures (incl. transportation)	**$131.50**	**$139.90**	**$140.90**	**1%**
Avg. Expenditures (excl. transportation)	**$84.60**	**$92.70**	**$88.80**	**-4%**
Lodging - Total	$45.30	$54.70	$59.10	8%
Lodging - Room	*$54.70*	*$65.90*	*$74.20*	*13%*
Lodging - Services (internet, etc)	*$3.30*	*$3.00*	*$8.40*	*180%*
Transportation - Total	$46.80	$47.20	$52.10	10%
Transportation - Total (excl. airfare)	*$22.70*	*$25.00*	*$23.50*	*-6%*
Transportation - Airfare	*$51.80*	*$48.80*	*$60.20*	*23%*
Transportation - Rental Car	*$33.50*	*$32.40*	*$36.80*	*14%*
Transportation - Other (taxi, gas, etc.)	*$11.70*	*$13.80*	*$10.80*	*-22%*
Food & Beverage	$31.40	$34.50	$33.40	-3%
Shopping	$12.90	$12.10	$13.50	12%
Entertainment & Recreation	$12.40	$13.50	$11.30	-16%
Other Expenses	$2.90	$4.90	$4.10	-16%

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO CENTRAL WEST FL

AGE OF ADULT TRAVELERS

	2017	2018	2019	Change '19/'18
18 - 34 Years Old	28%	13%	22%	▲
35 - 49 Years Old	22%	26%	25%	—
50 - 64 Years Old	32%	38%	33%	▼
65+ Years Old	18%	23%	20%	▼
Average Age	**48.5**	**53.0**	**50.4**	▼
Median Age	**49**	**56**	**51**	▼

HOUSEHOLD INCOME

	2017	2018	2019	Change '19/'18
Under $50,000	23%	26%	16%	▼
$50,000 - $74,999	18%	15%	17%	▲
$75,000 - $99,999	16%	13%	16%	▲
$100,000 - $149,999	23%	17%	23%	▲
Over $150,000	20%	29%	27%	▼
Average Household Income	**$107,900**	**$117,200**	**$119,600**	▲
Median Household Income	**$89,600**	**$92,300**	**$101,700**	▲

GENERATION

	2017	2018	2019	Change '19/'18
Millennials/Gen Z (Born 1981 to 1997)	30%	18%	26%	▲
GenX (Born 1965-1980)	30%	25%	30%	▲
Boomers (Born 1946 -1964)	36%	50%	38%	▼
Silent/GI (Born 1945 or earlier)	5%	6%	6%	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO NORTH CENTRAL FL

The North Central Vacation Region is made up of the following counties: Alachua, Bradford, Columbia, Dixie, Gadsden, Gilchrist, Hamilton, Jefferson, Lafayette, Leon, Levy, Madison, Suwannee, Taylor, Union, and Wakulla. Paddle and camp along the Big Bend. Immerse yourself in glass-clear springs, the real fountains of youth.

PRIMARY PURPOSE OF TRIP

	2017	2018	2019	Change '19/'18
Leisure	**74%**	**92%**	**85%**	▼
Vacation/Getaway Weekend	17%	26%	29%	▲
Visit Friends/Relatives	43%	42%	27%	▼
Other Leisure	14%	24%	29%	▲
Business	**26%**	**8%**	**15%**	▲
Transient Business	20%	2%	11%	▲
Group Meetings	6%	6%	4%	▼

TRANSPORTATION TYPE

	2017	2018	2019	Change '19/'18
Air	14%	28%	12%	▼
Non-Air	86%	72%	88%	▲

SEASONALITY

	2017	2018	2019	Change '19/'18
Winter (Dec, Jan, Feb)	37%	28%	31%	▲
Spring (Mar, Apr, May)	24%	18%	29%	▲
Summer (Jun, Jul, Aug)	11%	21%	8%	▼
Fall (Sept, Oct, Nov)	28%	32%	32%	—

TRAVEL PARTY COMPOSITION

	2017	2018	2019	Change '19/'18
One Male and One Female	30%	36%	46%	▲
One Adult	56%	46%	37%	▼
Two Males or Two Females	3%	4%	9%	▲
Families	4%	6%	5%	—
Three or More Adults	7%	7%	3%	▼
Average Party Size	**1.6**	**1.7**	**1.7**	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO NORTH CENTRAL FL

TOP ORIGIN STATES

	2017	2018	2019	Change '19/'18
Georgia	15.6%	10.1%	16.7%	▲
North Carolina	5.6%	5.7%	12.3%	▲
Arkansas	0%	0.3%	10.0%	▲
Alabama	5.0%	10.7%	9.4%	▼
Indiana	1.5%	1.5%	7.2%	▲

TOP ORIGIN DESIGNATED MARKET AREAS (DMAs)

	2017	2018	2019	Change '19/'18
Springfield, MO	0.0%	0.0%	10.7%	▲
Atlanta, GA	10.0%	6.2%	8.0%	▲
Raleigh-Durham, NC	0.5%	0.0%	7.3%	▲
Dothan, AL	2.7%	0.0%	6.6%	▲
Boston, MA	2.5%	0.0%	5.8%	▲

ACTIVITIES DURING TRIP

Activity (Multiple Response)	2017	2018	2019	Change '19/'18
Visit Friends/Relatives	29%	42%	32%	▼
Culinary/Dining Experience	33%	21%	20%	—
Parks (national/state)	8%	9%	14%	▲
Amateur Sports (attend/participate)	3%	5%	14%	▲
Beach/Waterfront	6%	8%	12%	▲
Nightlife (bar, nightclub etc)	4%	9%	11%	▲

LENGTH OF STAY

	2017	2018	2019	Change '19/'18
1-3 nights	72%	72%	87%	▲
4-7 nights	27%	26%	12%	▼
8+ nights	1%	2%	1%	—
Average Nights in Florida	**2.6**	**2.8**	**2.3**	▼
Median Nights in Florida	**2.0**	**1.8**	**1.3**	▼

Source: D.K. Shifflet; Arrows indicate change of at least 0.5 percentage points for origin data and at least 2 percentage points for other data; profile based on small sample size

DOMESTIC VISITORS TO NORTH CENTRAL FL

PAID VS. NON-PAID ACCOMMODATIONS

	2017	2018	2019	Change '19/'18
Paid	**65%**	**68%**	**68%**	—
Hotel Paid	57%	57%	53%	▼
Non-Hotel Paid	4%	11%	15%	▲
Non-Paid	**35%**	**32%**	**32%**	—

HOTEL LEVEL

	2017	2018	2019	Change '19/'18
High End	**3%**	**18%**	**11%**	▼
Luxury	0%	7%	0%	▼
Upscale	3%	11%	11%	—
Mid-Level	**71%**	**60%**	**49%**	▼
Upper Moderate	13%	12%	7%	▼
Moderate	58%	48%	42%	▼
Economy	**27%**	**22%**	**40%**	▲
Lower Moderate	10%	19%	16%	▼
Budget	16%	4%	25%	▲

ACCOMMODATION RESERVATION TYPE

	2017	2018	2019	Change '19/'18
Made Reservation	**70%**	**86%**	**92%**	▲
Online	26%	46%	59%	▲
Hotel Chain Website	*18%*	*28%*	*36%*	▲
Hotel Mobile App	*2%*	*2%*	*15%*	▲
Travel Website	*6%*	*13%*	*6%*	▼
Non-Hotel Accommodations Site/App	*-*	*3%*	*3%*	—
Called Directly	31%	24%	13%	▼
Travel Agent	0%	0%	2%	▲
As Part of a Package	5%	11%	1%	▼
Other	8%	4%	16%	▲
No Reservation	**30%**	**14%**	**8%**	▼

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO NORTH CENTRAL FL

TRIP PLANNING TIME FRAME

	2017	2018	2019	Change '19/'18
Less than 1 week	20%	15%	7%	▼
1-3 weeks	27%	17%	31%	▲
1 month	13%	16%	31%	▲
2-3 months	35%	29%	15%	▼
4-5 months	2%	8%	10%	▲
6 months or more	4%	15%	5%	▼

TRIP PLANNING RESOURCES USED

	2017	2018	2019	Change '19/'18
Used Resource	**65%**	**60%**	**76%**	▲
Past Experience	11%	31%	32%	—
Internet Search	11%	6%	32%	▲
Friend/Family/Colleague Recommendation	11%	11%	18%	▲
Hotel Chain Websites	19%	10%	17%	▲
Mapping Websites (Google Maps, etc)	11%	9%	10%	—
No Resource Used	**35%**	**40%**	**24%**	▼

AVERAGE EXPENDITURES PER PERSON PER DAY

	2017	2018	2019	Change '19/'18
Avg. Expenditures (incl. transportation)	**$125.30**	**$101.20**	**$100.40**	**-1%**
Avg. Expenditures (excl. transportation)	**$72.90**	**$66.40**	**$62.90**	**-5%**
Transportation - Total	$52.40	$34.80	$37.20	7%
Transportation - Total (excl. airfare)	*$38.80*	*$21.60*	*$21.30*	*-1%*
Transportation - Airfare	*$78.30*	*$47.60*	*$71.20*	*50%*
Transportation - Rental Car	*$47.20*	*$36.00*	*$29.20*	*-19%*
Transportation - Other (taxi, gas, etc.)	*$19.70*	*$15.90*	*$13.20*	*-17%*
Lodging - Total	$59.00	$61.50	$35.60	-42%
Lodging - Room	*$72.80*	*$87.50*	*$49.70*	*-43%*
Lodging - Services (internet, etc.)	*$1.60*	*$0.90*	*$0.20*	*-78%*
Food & Beverage	$33.10	$21.60	$29.40	36%
Shopping	$3.90	$3.90	$5.80	49%
Entertainment & Recreation	$1.40	$4.40	$5.60	27%
Other Expenses	$1.10	$2.70	$3.30	22%

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO NORTH CENTRAL FL

AGE OF ADULT TRAVELERS

	2017	2018	2019	Change '19/'18
18 - 34 Years Old	10%	31%	23%	▼
35 - 49 Years Old	45%	17%	21%	▲
50 - 64 Years Old	26%	29%	33%	▲
65+ Years Old	20%	23%	23%	—
Average Age	**49.9**	**49.5**	**49.6**	▲
Median Age	**45**	**49**	**54**	▲

HOUSEHOLD INCOME

	2017	2018	2019	Change '19/'18
Under $50,000	32%	19%	31%	▲
$50,000 - $74,999	9%	8%	13%	▲
$75,000 - $99,999	20%	18%	20%	▲
$100,000 - $149,999	23%	31%	6%	▼
Over $150,000	15%	23%	29%	▲
Average Household Income	**$96,900**	**$113,600**	**$113,800**	▲
Median Household Income	**$86,100**	**$107,500**	**$81,800**	▼

GENERATION

	2017	2018	2019	Change '19/'18
Millennials/Gen Z (Born 1981 to 1997)	27%	39%	32%	▼
GenX (Born 1965-1980)	33%	15%	19%	▲
Boomers (Born 1946 -1964)	28%	43%	47%	▲
Silent/GI (Born 1945 or earlier)	12%	3%	2%	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO NORTHEAST FL

The Northeast Vacation Region is made up of the following counties: Baker, Clay, Duval, Flagler, Nassau, Putnam, and St. Johns. The Historic Coast reveals our roots -- from the Timucuan (the original Floridians) to the colonists who settled St. Augustine, America's oldest city.

PRIMARY PURPOSE OF TRIP

	2017	2018	2019	Change '19/'18
Leisure	**86%**	**89%**	**93%**	▲
Visit Friends/Relatives	27%	41%	36%	▼
Vacation/Getaway Weekend	30%	32%	34%	▲
Other Leisure	29%	16%	23%	▲
Business	**13%**	**11%**	**7%**	▼
Group Meetings	5%	7%	4%	▼
Transient Business	8%	4%	3%	—

TRANSPORTATION TYPE

	2017	2018	2019	Change '19/'18
Air	21%	15%	23%	▲
Non-Air	79%	85%	77%	▼

SEASONALITY

	2017	2018	2019	Change '19/'18
Winter (Dec, Jan, Feb)	19%	25%	19%	▼
Spring (Mar, Apr, May)	29%	32%	22%	▼
Summer (Jun, Jul, Aug)	32%	24%	42%	▲
Fall (Sept, Oct, Nov)	20%	19%	17%	▼

TRAVEL PARTY COMPOSITION

	2017	2018	2019	Change '19/'18
One Male and One Female	43%	31%	39%	▲
One Adult	39%	41%	33%	▼
Families	9%	17%	16%	—
Three or More Adults	4%	7%	9%	▲
Two Males or Two Females	5%	3%	4%	—
Average Party Size	**1.9**	**2.0**	**2.1**	▲

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO NORTHEAST FL

TOP ORIGIN STATES

	2017	2018	2019	Change '19/'18
Georgia	24.7%	21.9%	27.7%	▲
North Carolina	4.0%	12.6%	9.4%	▼
Texas	3.8%	1.0%	9.4%	▲
New York	6.7%	6.2%	5.9%	—
Pennsylvania	5.7%	1.6%	5.3%	▲

TOP ORIGIN DESIGNATED MARKET AREAS (DMAs)

	2017	2018	2019	Change '19/'18
Atlanta, GA	9.8%	17.3%	13.4%	▼
New York, NY	8.9%	2.4%	7.6%	▲
Augusta, GA	0.9%	2.0%	6.0%	▲
Dallas-Fort Worth, TX	0.2%	0.6%	5.8%	▲
Raleigh-Durham, NC	1.0%	0.4%	4.7%	▲

ACTIVITIES DURING TRIP

Activity (Multiple Response)	2017	2018	2019	Change '19/'18
Beach/Waterfront	46%	52%	54%	▲
Visit Friends/Relatives	24%	36%	46%	▲
Historic Sites	28%	26%	25%	—
Shopping	26%	25%	25%	—
Touring/Sightseeing	22%	15%	23%	▲
Culinary/Dining Experience	26%	30%	34%	▲

LENGTH OF STAY

	2017	2018	2019	Change '19/'18
1-3 nights	74%	70%	68%	—
4-7 nights	21%	18%	27%	▲
8+ nights	5%	12%	5%	▼
Average Nights in Florida	**3.1**	**3.5**	**3.2**	▼
Median Nights in Florida	**1.8**	**2.2**	**2.1**	▼

Source: D.K. Shifflet; Arrows indicate change of at least 0.5 percentage points for origin data and at least 2 percentage points for other data; profile based on small sample size

DOMESTIC VISITORS TO NORTHEAST FL

PAID VS. NON-PAID ACCOMMODATIONS

	2017	2018	2019	Change '19/'18
Paid	**69%**	**67%**	**60%**	▼
Hotel Paid	52%	46%	32%	▼
Non-Hotel Paid	16%	20%	28%	▲
Non-Paid	**31%**	**33%**	**40%**	▲

HOTEL LEVEL

	2017	2018	2019	Change '19/'18
High End	**27%**	**27%**	**18%**	▼
Luxury	3%	4%	4%	—
Upscale	25%	24%	14%	▼
Mid-Level	**54%**	**64%**	**65%**	—
Upper Moderate	15%	23%	16%	▼
Moderate	39%	41%	48%	▲
Economy	**19%**	**9%**	**18%**	▲
Lower Moderate	9%	5%	6%	—
Budget	10%	3%	12%	▲

ACCOMMODATION RESERVATION TYPE

	2017	2018	2019	Change '19/'18
Made Reservation	**93%**	**86%**	**90%**	▲
Online	54%	67%	54%	▼
Hotel Chain Website	*29%*	*42%*	*41%*	—
Travel Website	*23%*	*16%*	*7%*	▼
Non-Hotel Accommodations Site/App	-	*2%*	*4%*	▲
Hotel Mobile App	*2%*	*6%*	*3%*	▼
Called Directly	30%	7%	18%	▲
As Part of a Package	2%	3%	10%	▲
Travel Agent	1%	3%	0%	▼
Other	6%	6%	7%	—
No Reservation	**7%**	**14%**	**10%**	▼

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO NORTHEAST FL

TRIP PLANNING TIME FRAME

	2017	2018	2019	Change '19/'18
Less than 1 week	13%	4%	15%	▲
1-3 weeks	25%	24%	20%	▼
1 month	20%	26%	22%	▼
2-3 months	29%	26%	19%	▼
4-5 months	6%	9%	10%	—
6 months or more	8%	11%	15%	▲

TRIP PLANNING RESOURCES USED

	2017	2018	2019	Change '19/'18
Used Resource	**79%**	**74%**	**83%**	▲
Past Experience	26%	31%	36%	▲
Friend/Family/Colleague Recommendation	24%	21%	33%	▲
Internet Search	18%	11%	26%	▲
Guest Review Websites (TripAdvisor, etc.)	10%	9%	19%	▲
Hotel Chain Websites	15%	13%	16%	▲
No Resource Used	**21%**	**26%**	**17%**	▼

AVERAGE EXPENDITURES PER PERSON PER DAY

	2017	2018	2019	Change '19/'18
Avg. Expenditures (incl. transportation)	**$143.20**	**$112.90**	**$122.50**	**9%**
Avg. Expenditures (excl. transportation)	**$103.50**	**$82.40**	**$83.90**	**2%**
Lodging - Total	$63.70	$56.90	$48.70	-14%
Lodging - Room	*$73.40*	*$70.40*	*$56.30*	*-20%*
Lodging - Services (internet, etc)	*$1.60*	*$2.60*	*$1.60*	*-38%*
Transportation - Total	*$39.60*	$30.60	$38.60	26%
Transportation - Total (excl. airfare)	*$22.60*	*$20.90*	*$24.40*	*17%*
Transportation - Airfare	$67.00	*$49.10*	*$48.40*	*-1%*
Transportation - Rental Car	*$45.40*	*$34.40*	*$41.70*	*21%*
Transportation - Other (taxi, gas, etc.)	*$14.20*	*$13.20*	*$15.10*	*14%*
Food & Beverage	$34.50	$29.40	$31.00	5%
Shopping	$13.40	$13.10	$14.10	8%
Entertainment & Recreation	$8.90	$7.60	$12.10	59%
Other Expenses	$2.90	$3.50	$2.10	-40%

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO NORTHEAST FL

AGE OF ADULT TRAVELERS

	2017	2018	2019	Change '19/'18
18 - 34 Years Old	12%	16%	19%	▲
35 - 49 Years Old	20%	31%	32%	—
50 - 64 Years Old	37%	32%	26%	▼
65+ Years Old	30%	21%	22%	—
Average Age	**54.8**	**51.6**	**50.4**	▼
Median Age	**55**	**53**	**48**	▼

HOUSEHOLD INCOME

	2017	2018	2019	Change '19/'18
Under $50,000	16%	14%	29%	▲
$50,000 - $74,999	13%	22%	15%	▼
$75,000 - $99,999	22%	26%	16%	▼
$100,000 - $149,999	22%	24%	21%	▼
Over $150,000	27%	14%	19%	▲
Average Household Income	**$124,400**	**$100,200**	**$105,300**	▲
Median Household Income	**$98,900**	**$88,400**	**$84,900**	▼

GENERATION

	2017	2018	2019	Change '19/'18
Millennials/Gen Z (Born 1981 to 1997)	16%	23%	21%	▼
GenX (Born 1965-1980)	25%	27%	37%	▲
Boomers (Born 1946 -1964)	46%	46%	35%	▼
Silent/GI (Born 1945 or earlier)	13%	4%	7%	▲

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO NORTHWEST FL

The Northwest Vacation Region includes the following counties: Bay, Calhoun, Escambia, Franklin, Gulf, Holmes, Jackson, Liberty, Okaloosa, Santa Rosa, Walton, and Washington. The beaches are a daily meditation of white sand, emerald surf, and blue sky.

PRIMARY PURPOSE OF TRIP

	2017	2018	2019	Change '19/'18
Leisure	**96%**	**95%**	**96%**	—
Vacation/Getaway Weekend	75%	72%	70%	▼
Visit Friends/Relatives	12%	12%	17%	▲
Other Leisure	9%	11%	9%	▼
Business	**4%**	**6%**	**4%**	▼
Transient Business	3%	3%	2%	—
Group Meetings	1%	3%	2%	—

TRANSPORTATION TYPE

	2017	2018	2019	Change '19/'18
Air	5%	4%	9%	▲
Non-Air	95%	96%	91%	▼

SEASONALITY

	2017	2018	2019	Change '19/'18
Winter (Dec, Jan, Feb)	8%	16%	12%	▼
Spring (Mar, Apr, May)	20%	24%	18%	▼
Summer (Jun, Jul, Aug)	50%	43%	50%	▲
Fall (Sept, Oct, Nov)	22%	17%	20%	▲

TRAVEL PARTY COMPOSITION

	2017	2018	2019	Change '19/'18
One Male and One Female	44%	34%	38%	▲
Families	26%	32%	32%	—
One Adult	16%	23%	17%	▼
Three or More Adults	10%	9%	9%	—
Two Males or Two Females	3%	2%	5%	▲
Average Party Size	**2.6**	**2.7**	**2.6**	▼

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO NORTHWEST FL

TOP ORIGIN STATES

	2017	2018	2019	Change '19/'18
Tennessee	9.1%	12.6%	16.8%	▲
Texas	16.2%	9.8%	14.0%	▲
Georgia	10.5%	14.4%	12.3%	▼
Alabama	14.9%	16.6%	11.5%	▼
Louisiana	7.2%	7.5%	7.9%	—

TOP ORIGIN DESIGNATED MARKET AREAS (DMAs)

	2017	2018	2019	Change '19/'18
Atlanta, GA	7.8%	12.4%	10.4%	▼
Nashville, TN	4.6%	7.7%	9.6%	▲
Houston, TX	7.2%	2.1%	7.8%	▲
Birmingham, AL	4.4%	4.7%	6.3%	▲
Memphis, TN	3.1%	1.4%	3.9%	▲

ACTIVITIES DURING TRIP

Activity (Multiple Response)	2017	2018	2019	Change '19/'18
Beach/Waterfront	81%	77%	82%	▲
Culinary/Dining Experience	41%	38%	40%	▲
Shopping	46%	40%	39%	—
Touring/Sightseeing	21%	23%	23%	—
Visit Friends/Relatives	22%	16%	22%	▲
Parks (national/state)	17%	9%	18%	▲

LENGTH OF STAY

	2017	2018	2019	Change '19/'18
1-3 nights	46%	48%	47%	—
4-7 nights	47%	48%	49%	—
8+ nights	7%	5%	4%	—
Average Nights in Florida	**4.4**	**4.2**	**4.3**	▲
Median Nights in Florida	**3.0**	**2.8**	**2.8**	—

Source: D.K. Shifflet; Arrows indicate change of at least 0.5 percentage points for origin data and at least 2 percentage points for other data; profile based on small sample size

DOMESTIC VISITORS TO NORTHWEST FL

PAID VS. NON-PAID ACCOMMODATIONS

	2017	2018	2019	Change '19/'18
Paid	**81%**	**82%**	**76%**	▼
Hotel Paid	28%	35%	32%	▼
Non-Hotel Paid	52%	47%	44%	▼
Non-Paid	**19%**	**18%**	**24%**	▲

HOTEL LEVEL

	2017	2018	2019	Change '19/'18
High End	**23%**	**28%**	**22%**	▼
Luxury	11%	8%	1%	▼
Upscale	12%	20%	21%	—
Mid-Level	**61%**	**48%**	**64%**	▲
Upper Moderate	13%	10%	24%	▲
Moderate	48%	39%	40%	—
Economy	**16%**	**24%**	**14%**	▼
Lower Moderate	6%	14%	12%	▼
Budget	10%	10%	2%	▼

ACCOMMODATION RESERVATION TYPE

	2017	2018	2019	Change '19/'18
Made Reservation	**94%**	**91%**	**94%**	▲
Online	48%	59%	63%	▲
Hotel Chain Website	*19%*	*23%*	*28%*	▲
Travel Website	*25%*	*19%*	*26%*	▲
Non-Hotel Accommodations Site/App	-	*13%*	*7%*	▼
Hotel Mobile App	*4%*	*5%*	*2%*	▼
Called Directly	24%	19%	23%	▲
As Part of a Package	6%	7%	4%	▼
Travel Agent	2%	1%	0%	—
Other	14%	6%	4%	▼
No Reservation	**6%**	**9%**	**6%**	▼

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO NORTHWEST FL

TRIP PLANNING TIME FRAME

	2017	2018	2019	Change '19/'18
Less than 1 week	9%	16%	5%	▼
1-3 weeks	20%	17%	27%	▲
1 month	15%	15%	21%	▲
2-3 months	25%	30%	22%	▼
4-5 months	13%	8%	7%	—
6 months or more	18%	14%	18%	▲

TRIP PLANNING RESOURCES USED

	2017	2018	2019	Change '19/'18
Used Resource	**83%**	**79%**	**74%**	▼
Past Experience	40%	32%	29%	▼
Internet Search	22%	16%	18%	▲
Hotel Chain Websites	14%	20%	16%	▼
Friend/Family/Colleague Recommendation	22%	25%	16%	▼
Travel Booking Website (Expedia, etc.)	5%	8%	9%	—
No Resource Used	**17%**	**21%**	**26%**	▲

AVERAGE EXPENDITURES PER PERSON PER DAY

	2017	2018	2019	Change '19/'18
Avg. Expenditures (incl. transportation)	**$152.20**	**$125.70**	**$140.50**	**12%**
Avg. Expenditures (excl. transportation)	**$130.60**	**$103.50**	**$114.80**	**11%**
Lodging - Total	$66.50	$52.20	$61.20	17%
Lodging - Room	*$72.90*	*$58.10*	*$69.40*	*19%*
Lodging - Services (internet, etc.)	*$51.70*	*$2.90*	*$2.50*	*-14%*
Transportation - Total	$21.60	$22.10	$25.70	16%
Transportation - Total (excl. airfare)	*$19.90*	*$19.60*	*$18.80*	*-4%*
Transportation - Airfare	*$37.00*	*$53.00*	*$53.60*	*1%*
Transportation - Rental Car	*$39.90*	*$37.80*	*$39.60*	*5%*
Transportation - Other (taxi, gas, etc.)	*$14.00*	*$16.40*	*$13.40*	*-18%*
Food & Beverage	$38.20	$32.90	$37.00	12%
Shopping	$21.00	$18.10	$17.40	-4%
Entertainment & Recreation	$17.20	$10.90	$12.80	17%
Other Expenses	$3.50	$3.00	$2.50	-17%

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO NORTHWEST FL

AGE OF ADULT TRAVELERS

	2017	2018	2019	Change '19/'18
18 - 34 Years Old	29%	32%	26%	▼
35 - 49 Years Old	27%	35%	30%	▼
50 - 64 Years Old	27%	20%	30%	▲
65+ Years Old	17%	12%	14%	▲
Average Age	**47.8**	**43.5**	**47.6**	▲
Median Age	**47**	**41**	**45**	▲

HOUSEHOLD INCOME

	2017	2018	2019	Change '19/'18
Under $50,000	25%	32%	21%	▼
$50,000 - $74,999	20%	24%	19%	▼
$75,000 - $99,999	12%	17%	23%	▲
$100,000 - $149,999	19%	16%	20%	▲
Over $150,000	23%	11%	16%	▲
Average Household Income	**$112,800**	**$88,500**	**$98,100**	▲
Median Household Income	**$84,500**	**$70,800**	**$85,900**	▲

GENERATION

	2017	2018	2019	Change '19/'18
Millennials/Gen Z (Born 1981 to 1997)	32%	37%	35%	▼
GenX (Born 1965-1980)	28%	34%	29%	▼
Boomers (Born 1946 -1964)	35%	28%	31%	▲
Silent/GI (Born 1945 or earlier)	5%	1%	5%	▲

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO SOUTHEAST FL

The Southeast Vacation Region is made up of the following counties: Broward, Miami-Dade, Monroe, and Palm Beach. One jaw drop after another -- from the Everglades wilderness to South Beach sights to the Keys' coral sanctuaries.

PRIMARY PURPOSE OF TRIP

	2017	2018	2019	Change '19/'18
Leisure	**87%**	**91%**	**94%**	▲
Vacation/Getaway Weekend	48%	55%	57%	—
Visit Friends/Relatives	22%	22%	22%	—
Other Leisure	17%	14%	15%	—
Business	**13%**	**9%**	**6%**	▼
Group Meetings	8%	5%	3%	▼
Transient Business	5%	4%	3%	—

TRANSPORTATION TYPE

	2017	2018	2019	Change '19/'18
Air	48%	50%	43%	▼
Non-Air	52%	50%	57%	▲

SEASONALITY

	2017	2018	2019	Change '19/'18
Winter (Dec, Jan, Feb)	33%	32%	30%	▼
Spring (Mar, Apr, May)	24%	25%	23%	▼
Summer (Jun, Jul, Aug)	24%	22%	28%	▲
Fall (Sept, Oct, Nov)	19%	21%	19%	▼

TRAVEL PARTY COMPOSITION

	2017	2018	2019	Change '19/'18
One Adult	45%	42%	34%	▼
One Male and One Female	36%	35%	43%	▲
Families	7%	11%	11%	—
Two Males or Two Females	6%	6%	5%	—
Three of More Adults	5%	5%	7%	▲
Average Party Size	**1.8**	**1.9**	**2.0**	▲

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO SOUTHEAST FL

TOP ORIGIN STATES

	2017	2018	2019	Change '19/'18
New York	12.1%	12.8%	16.1%	▲
Pennsylvania	4.8%	4.8%	9.5%	▲
Georgia	8.0%	7.6%	8.4%	▲
Texas	4.2%	2.5%	5.9%	▲
New Jersey	6.6%	7.0%	5.6%	▼

TOP ORIGIN DESIGNATED MARKET AREAS (DMAs)

	2017	2018	2019	Change '19/'18
New York, NY	16.6%	17.5%	18.1%	▲
Atlanta, GA	6.8%	6.3%	6.3%	—
Harrisburg-Lancaster-Lebanon-York, PA	0.0%	0.8%	5.6%	▲
Boston, MA	3.0%	4.1%	4.6%	▲
Washington, DC	4.6%	5.3%	4.3%	▼

ACTIVITIES DURING TRIP

Activity (Multiple Response)	2017	2018	2019	Change '19/'18
Beach/Waterfront	52%	53%	57%	▲
Culinary/Dining Experience	33%	32%	34%	▲
Shopping	27%	25%	31%	▲
Visit Friends/Relatives	31%	28%	30%	▲
Nightlife	22%	20%	21%	—
Touring/Sightseeing	18%	15%	18%	▲

LENGTH OF STAY

	2017	2018	2019	Change '19/'18
1-3 nights	58%	62%	60%	▼
4-7 nights	35%	32%	33%	—
8+ nights	7%	6%	7%	—
Average Nights in Florida	**3.8**	**3.6**	**3.7**	▲
Median Nights in Florida	**2.3**	**2.2**	**2.5**	▲

Source: D.K. Shifflet; Arrows indicate change of at least 0.5 percentage points for origin data and at least 2 percentage points for other data; profile based on small sample size

DOMESTIC VISITORS TO SOUTHEAST FL

PAID VS. NON-PAID ACCOMMODATIONS

	2017	2018	2019	Change '19/'18
Paid	**72%**	**71%**	**67%**	▼
Hotel Paid	47%	49%	42%	▼
Non-Hotel Paid	25%	22%	25%	▲
Non-Paid	**28%**	**29%**	**33%**	▲

HOTEL LEVEL

	2017	2018	2019	Change '19/'18
High End	**45%**	**47%**	**52%**	▲
Luxury	12%	13%	14%	—
Upscale	32%	35%	38%	▲
Mid-Level	**44%**	**41%**	**40%**	—
Upper Moderate	18%	18%	18%	—
Moderate	25%	24%	22%	▼
Economy	**12%**	**12%**	**9%**	▼
Lower Moderate	8%	7%	4%	▼
Budget	3%	5%	4%	—

ACCOMMODATION RESERVATION TYPE

	2017	2018	2019	Change '19/'18
Made Reservation	**89%**	**94%**	**92%**	—
Online	50%	60%	53%	▼
Hotel Chain Website	*31%*	*33%*	*31%*	▼
Travel Website	*16%*	*12%*	*16%*	▲
Hotel Mobile App	*3%*	*5%*	*4%*	—
Non-Hotel Accommodations Site/App	-	*9%*	*3%*	▼
Called Directly	15%	16%	18%	▲
As Part of a Package	10%	10%	10%	—
Travel Agent	4%	4%	5%	—
Other	9%	3%	6%	▲
No Reservation	**11%**	**6%**	**8%**	▲

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO SOUTHEAST FL

TRIP PLANNING TIME FRAME

	2017	2018	2019	Change '19/'18
Less than 1 week	7%	7%	5%	▼
1-3 weeks	29%	22%	18%	▼
1 month	17%	22%	16%	▼
2-3 months	25%	27%	30%	▲
4-5 months	7%	7%	13%	▲
6 months or more	16%	17%	18%	—

TRIP PLANNING RESOURCES USED

	2017	2018	2019	Change '19/'18
Used Resource	**71%**	**75%**	**76%**	—
Past Experience	32%	28%	30%	▲
Hotel Chain Websites	15%	15%	21%	▲
Internet Search	15%	16%	18%	▲
Friend/Family/Colleague Recommendation	18%	17%	17%	—
Guest Review Websites (TripAdvisor, etc.)	7%	7%	11%	▲
No Resource Used	**29%**	**25%**	**24%**	—

AVERAGE EXPENDITURES PER PERSON PER DAY

	2017	2018	2019	Change '19/'18
Avg. Expenditures (incl. transportation)	**$195.50**	**$204.50**	**$194.30**	**-5%**
Avg. Expenditures (excl. transportation)	**$140.50**	**$145.10**	**$137.80**	**-5%**
Lodging - Total	$82.70	$85.90	$94.10	10%
Lodging - Room	*$93.70*	*$93.70*	*$100.00*	*7%*
Lodging - Services (internet, etc.)	*$13.50*	*$13.30*	*$15.60*	*17%*
Transportation - Total	$55.10	$59.50	$56.50	-5%
Transportation - Total (excl. airfare)	*$24.00*	*$26.60*	*$24.00*	*-10%*
Transportation - Airfare	*$60.10*	*$59.50*	*$67.90*	*14%*
Transportation - Rental Car	*$37.30*	*$38.60*	*$37.90*	*-2%*
Transportation - Other (taxi, gas, etc.)	*$13.40*	*$14.50*	*$12.80*	*-12%*
Food & Beverage	$42.60	$46.90	$41.70	-11%
Shopping	$20.50	$21.40	$21.10	-1%
Entertainment & Recreation	$19.60	$18.30	$16.30	-11%
Other Expenses	$6.30	$7.30	$4.70	-36%

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO SOUTHEAST FL

AGE OF ADULT TRAVELERS

	2017	2018	2019	Change '19/'18
18 - 34 Years Old	25%	22%	22%	—
35 - 49 Years Old	27%	28%	23%	▼
50 - 64 Years Old	25%	27%	30%	▲
65+ Years Old	23%	23%	25%	▲
Average Age	**48.5**	**50.3**	**51.1**	▲
Median Age	**48**	**49**	**52**	▲

HOUSEHOLD INCOME

	2017	2018	2019	Change '19/'18
Under $50,000	17%	14%	20%	▲
$50,000 - $74,999	21%	15%	11%	▼
$75,000 - $99,999	12%	16%	15%	—
$100,000 - $149,999	22%	24%	21%	▼
Over $150,000	28%	31%	32%	—
Average Household Income	**$130,900**	**$131,900**	**$132,600**	▲
Median Household Income	**$101,000**	**$109,800**	**$108,400**	▼

GENERATION

	2017	2018	2019	Change '19/'18
Millennials/Gen Z (Born 1981 to 1997)	29%	25%	29%	▲
GenX (Born 1965-1980)	29%	32%	24%	▼
Boomers (Born 1946 -1964)	37%	36%	40%	▲
Silent/GI (Born 1945 or earlier)	5%	7%	7%	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO SOUTHWEST FL

The Southwest Vacation Region is made up of the following counties: Charlotte, Collier, DeSoto, Glades, Hendry, Lee, Manatee, and Sarasota. From fine arts and performing arts to wildlife refuges and Ten Thousand Islands.

PRIMARY PURPOSE OF TRIP

	2017	2018	2019	Change '19/'18
Leisure	**97%**	**94%**	**95%**	—
Vacation/Getaway Weekend	37%	48%	50%	▲
Visit Friends/Relatives	39%	33%	33%	—
Other Leisure	21%	13%	12%	—
Business	**4%**	**5%**	**5%**	—
Group Meetings	2%	3%	3%	—
Transient Business	2%	2%	2%	—

TRANSPORTATION TYPE

	2017	2018	2019	Change '19/'18
Air	32%	44%	42%	▼
Non-Air	68%	56%	58%	—

SEASONALITY

	2017	2018	2019	Change '19/'18
Winter (Dec, Jan, Feb)	32%	32%	31%	—
Spring (Mar, Apr, May)	27%	28%	30%	▲
Summer (Jun, Jul, Aug)	18%	17%	22%	▲
Fall (Sept, Oct, Nov)	23%	23%	17%	▼

TRAVEL PARTY COMPOSITION

	2017	2018	2019	Change '19/'18
One Male and One Female	52%	47%	47%	—
One Adult	27%	34%	31%	▼
Families	13%	10%	10%	—
Three or More Adults	5%	5%	8%	▲
Two Males or Two Females	3%	3%	4%	—
Average Party Size	**2.1**	**1.9**	**2.0**	▲

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO SOUTHWEST FL

TOP ORIGIN STATES

	2017	2018	2019	Change '19/'18
New York	9.8%	8.3%	11.0%	▲
Ohio	7.2%	5.9%	9.6%	▲
Michigan	6.6%	9.2%	7.3%	▼
Tennessee	3.5%	2.3%	6.1%	▲
Massachusetts	7.4%	5.8%	5.4%	—

TOP ORIGIN DESIGNATED MARKET AREAS (DMAs)

	2017	2018	2019	Change '19/'18
New York, NY	10.0%	8.7%	9.9%	▲
Boston, MA	11.4%	4.4%	6.0%	▲
Cincinnati, OH	3.2%	2.6%	4.2%	▲
Chicago, IL	4.6%	7.1%	3.7%	▼
Columbus, OH	1.5%	1.3%	3.5%	▲

ACTIVITIES DURING TRIP

Activity (Multiple Response)	2017	2018	2019	Change '19/'18
Beach/Waterfront	71%	63%	62%	—
Visit Friends/Relatives	52%	46%	43%	▼
Culinary/Dining Experience	47%	45%	42%	▼
Shopping	37%	32%	31%	—
Touring/Sightseeing	16%	17%	19%	▲
Parks (national/state)	22%	17%	15%	▼

LENGTH OF STAY

	2017	2018	2019	Change '19/'18
1-3 nights	45%	36%	36%	—
4-7 nights	36%	41%	49%	▲
8+ nights	19%	22%	15%	▼
Average Nights in Florida	**5.4**	**5.8**	**5.6**	▼
Median Nights in Florida	**3.4**	**3.9**	**3.9**	▼

Source: D.K. Shifflet; Arrows indicate change of at least 0.5 percentage points for origin data and at least 2 percentage points for other data; profile based on small sample size

DOMESTIC VISITORS TO SOUTHWEST FL

PAID VS. NON-PAID ACCOMMODATIONS

	2017	2018	2019	Change '19/'18
Paid	**50%**	**51%**	**54%**	▲
Hotel Paid	24%	21%	24%	▲
Non-Hotel Paid	25%	29%	29%	—
Non-Paid	**50%**	**49%**	**46%**	▼

HOTEL LEVEL

	2017	2018	2019	Change '19/'18
High End	**35%**	**33%**	**29%**	▼
Luxury	17%	11%	5%	▼
Upscale	18%	22%	24%	▲
Mid-Level	**52%**	**51%**	**54%**	▲
Upper Moderate	18%	17%	15%	▼
Moderate	34%	34%	39%	▲
Economy	**13%**	**15%**	**17%**	▲
Lower Moderate	6%	12%	5%	▼
Budget	8%	3%	13%	▲

ACCOMMODATION RESERVATION TYPE

	2017	2018	2019	Change '19/'18
Made Reservation	**89%**	**88%**	**91%**	▲
Online	51%	41%	51%	▲
Hotel Chain Website	*27%*	*19%*	*24%*	▲
Travel Website	*23%*	*13%*	*20%*	▲
Non-Hotel Accommodations Site/App	-	*7%*	*5%*	▼
Hotel Mobile App	*1%*	*2%*	*3%*	—
Called Directly	15%	28%	17%	▼
As Part of a Package	9%	5%	12%	▲
Travel Agent	3%	2%	0%	▼
Other	11%	13%	10%	▼
No Reservation	**11%**	**12%**	**9%**	▼

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO SOUTHWEST FL

TRIP PLANNING TIME FRAME

	2017	2018	2019	Change '19/'18
Less than 1 week	4%	6%	7%	—
1-3 weeks	17%	18%	18%	—
1 month	17%	17%	14%	▼
2-3 months	23%	32%	36%	▲
4-5 months	15%	6%	9%	▲
6 months or more	23%	20%	16%	▼

TRIP PLANNING RESOURCES USED

	2017	2018	2019	Change '19/'18
Used Resource	**81%**	**77%**	**76%**	—
Past Experience	48%	37%	36%	—
Friend/Family/Colleague Recommendation	25%	18%	30%	▲
Internet Search	14%	15%	18%	▲
Mapping Websites (Google maps, etc.)	7%	8%	16%	▲
Hotel Chain Websites	10%	10%	12%	▲
No Resource Used	**19%**	**23%**	**24%**	—

AVERAGE EXPENDITURES PER PERSON PER DAY

	2017	2018	2019	Change '19/'18
Avg. Expenditures (incl. transportation)	**$144.90**	**$168.50**	**$143.00**	**-15%**
Avg. Expenditures (excl. transportation)	**$109.20**	**$124.40**	**$100.60**	**-19%**
Lodging - Total	$72.40	$85.20	$63.70	-25%
Lodging - Room	*$90.20*	*$103.50*	*$87.70*	*-15%*
Lodging - Services (internet, etc.)	*$1.50*	*$4.80*	*$4.20*	*-13%*
Transportation - Total	$35.70	$44.10	$42.30	-4%
Transportation - Total (excl. airfare)	*$20.70*	*$23.30*	*$20.90*	*-10%*
Transportation - Airfare	*$36.00*	*$48.70*	*$48.40*	*-1%*
Transportation - Rental Car	*$28.60*	*$32.40*	*$34.00*	*5%*
Transportation - Other (taxi, gas, etc.)	*$11.80*	*$12.40*	*$9.60*	*-23%*
Food & Beverage	$36.00	$42.70	$37.70	-12%
Shopping	$17.80	$19.80	$16.40	-17%
Entertainment & Recreation	$14.20	$16.80	$13.90	-17%
Other Expenses	$4.70	$4.30	$2.80	-35%

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

DOMESTIC VISITORS TO SOUTHWEST FL

AGE OF ADULT TRAVELERS

	2017	2018	2019	Change '19/'18
18 - 34 Years Old	21%	14%	18%	▲
35 - 49 Years Old	20%	22%	19%	▼
50 - 64 Years Old	28%	31%	30%	—
65+ Years Old	31%	33%	33%	—
Average Age	**52.5**	**55.1**	**54.4**	▼
Median Age	**54**	**57**	**56**	▼

HOUSEHOLD INCOME

	2017	2018	2019	Change '19/'18
Under $50,000	19%	12%	14%	▲
$50,000 - $74,999	14%	18%	14%	▼
$75,000 - $99,999	20%	15%	14%	—
$100,000 - $149,999	26%	25%	31%	▲
Over $150,000	22%	29%	27%	▼
Average Household Income	**$114,100**	**$127,100**	**$129,200**	▲
Median Household Income	**$97,700**	**$107,900**	**$113,300**	▲

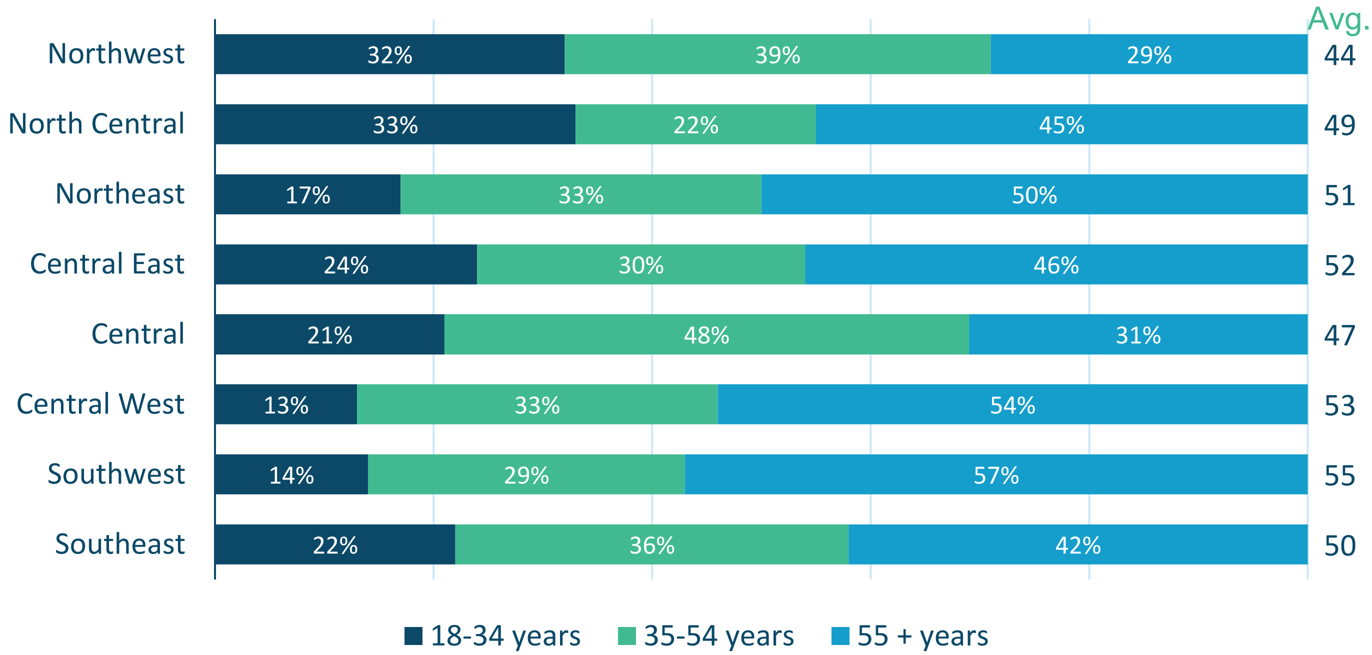
GENERATION

	2017	2018	2019	Change '19/'18
Millennials/Gen Z (Born 1981 to 1997)	24%	20%	21%	—
GenX (Born 1965-1980)	21%	22%	25%	▲
Boomers (Born 1946 -1964)	47%	47%	43%	▼
Silent/GI (Born 1945 or earlier)	8%	12%	10%	▼

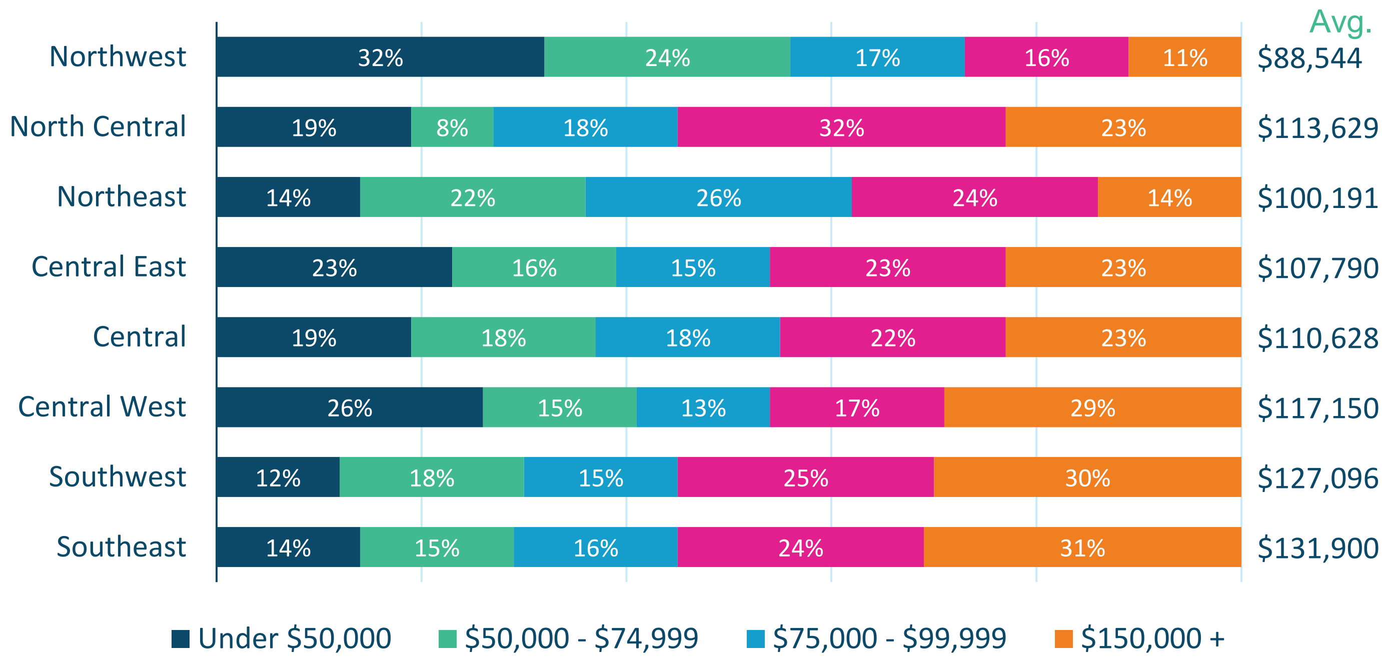
Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points; profile based on small sample size

REGIONAL COMPARISON - 2018

AGE BY FLORIDA REGION



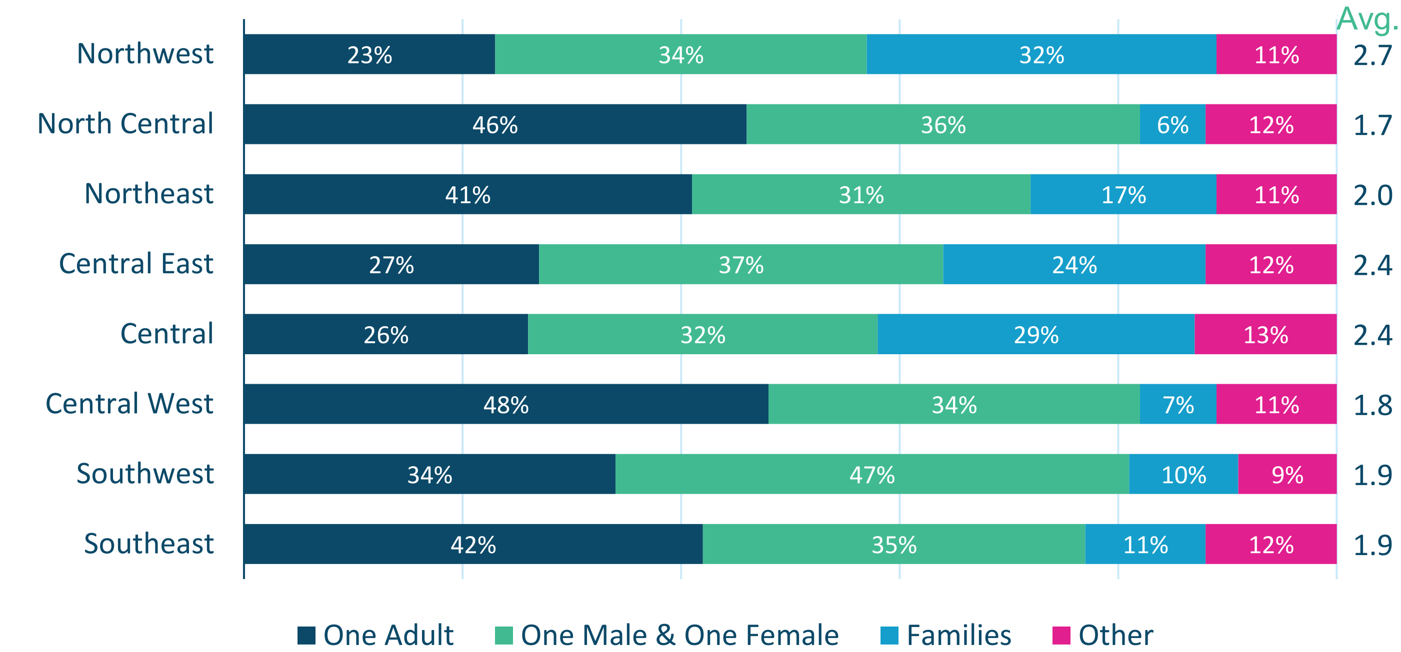
HOUSEHOLD INCOME BY FLORIDA REGION



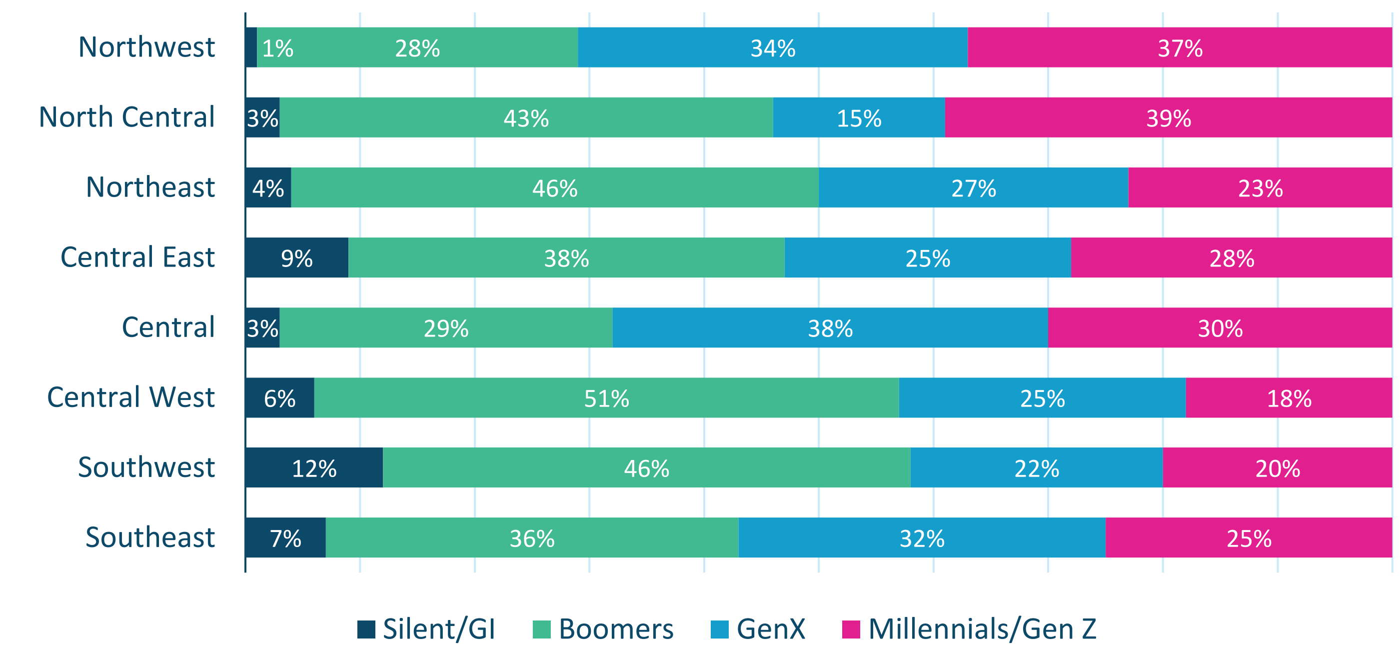
Source: D.K. Shifflet

REGIONAL COMPARISON - 2018 (CONTINUED)

TRAVEL PARTY COMPOSITION & SIZE BY FLORIDA REGION



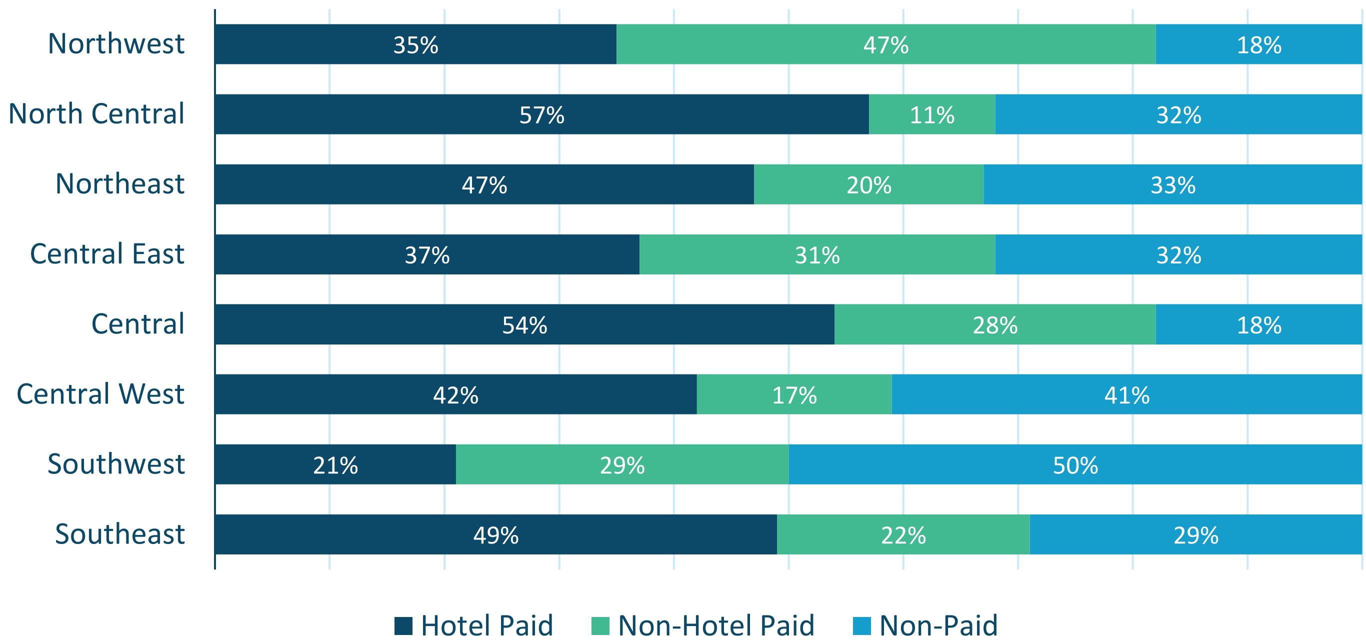
GENERATION BY FLORIDA REGION



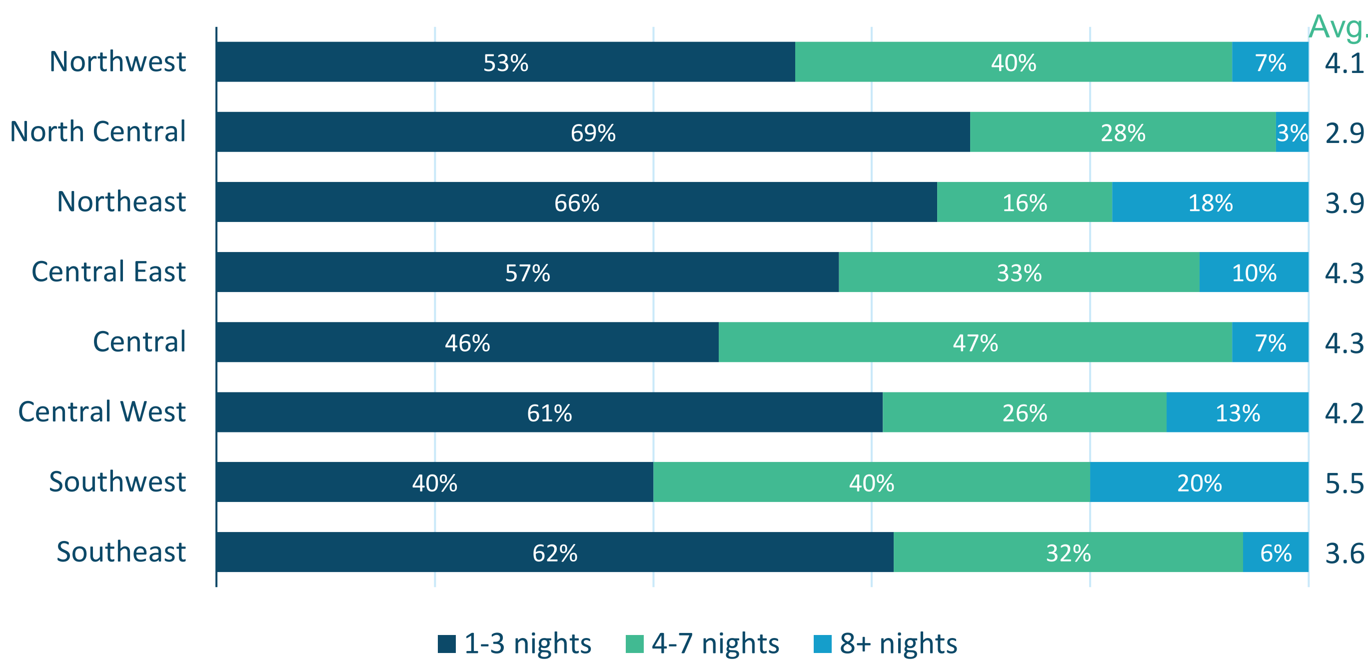
Source: D.K. Shifflet

REGIONAL COMPARISON - 2018 (CONTINUED)

ACCOMMODATION TYPE BY FLORIDA REGION



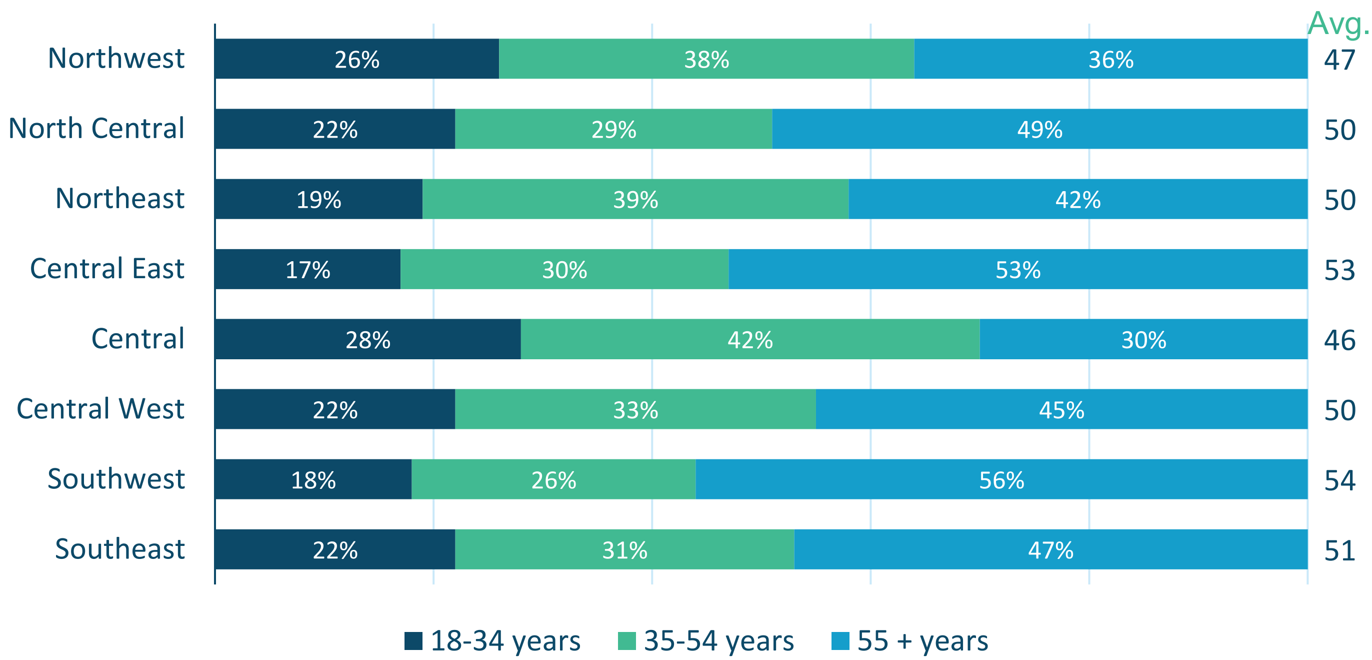
LENGTH OF STAY BY FLORIDA REGION



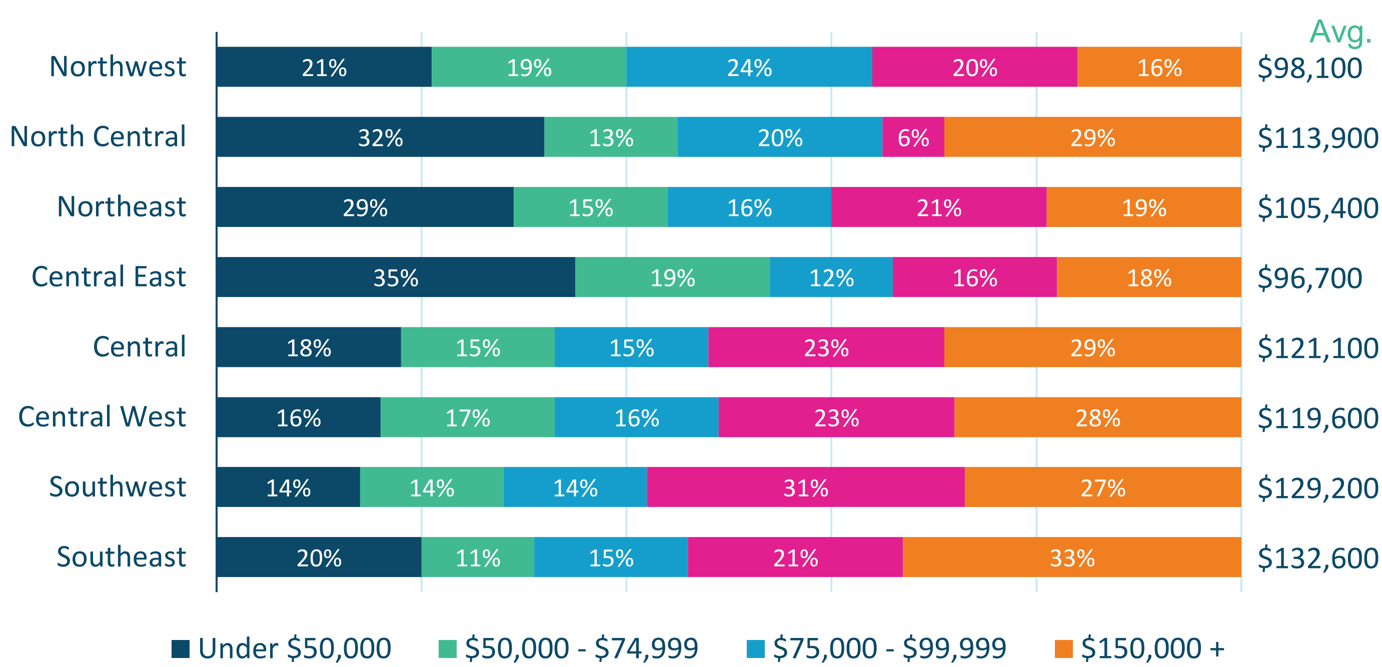
Source: D.K. Shifflet

REGIONAL COMPARISON - 2019

AGE BY FLORIDA REGION



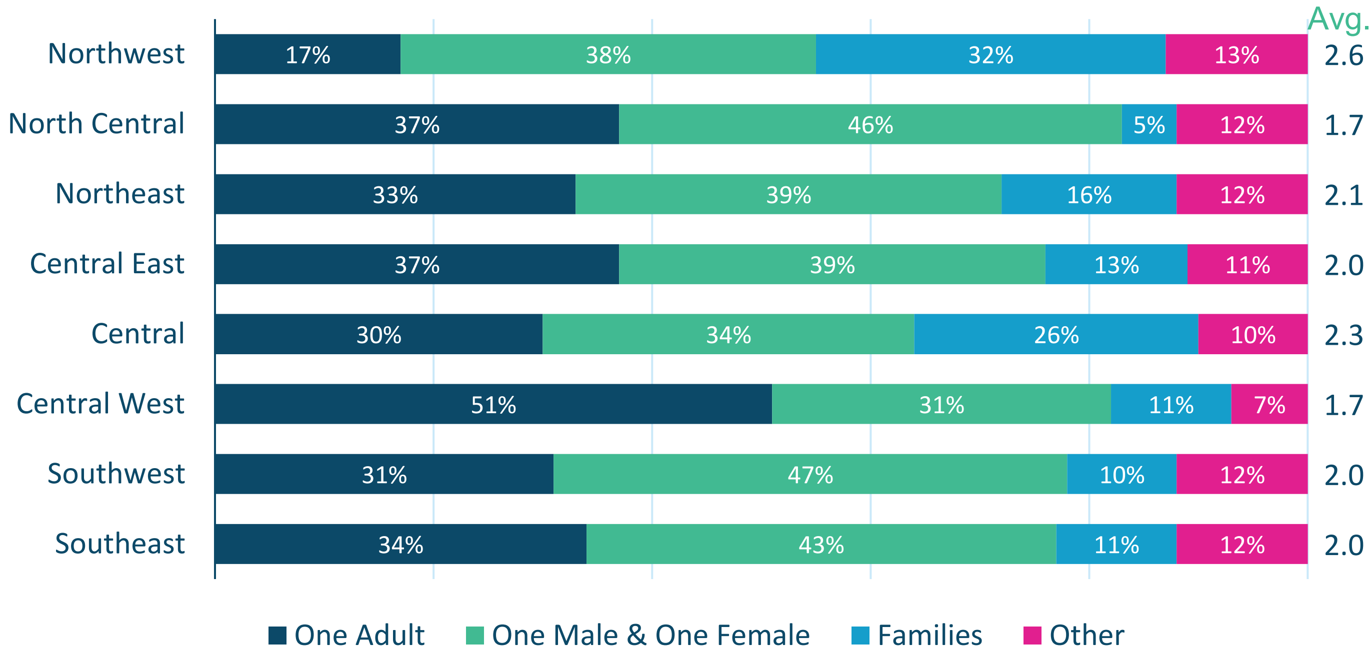
HOUSEHOLD INCOME BY FLORIDA REGION



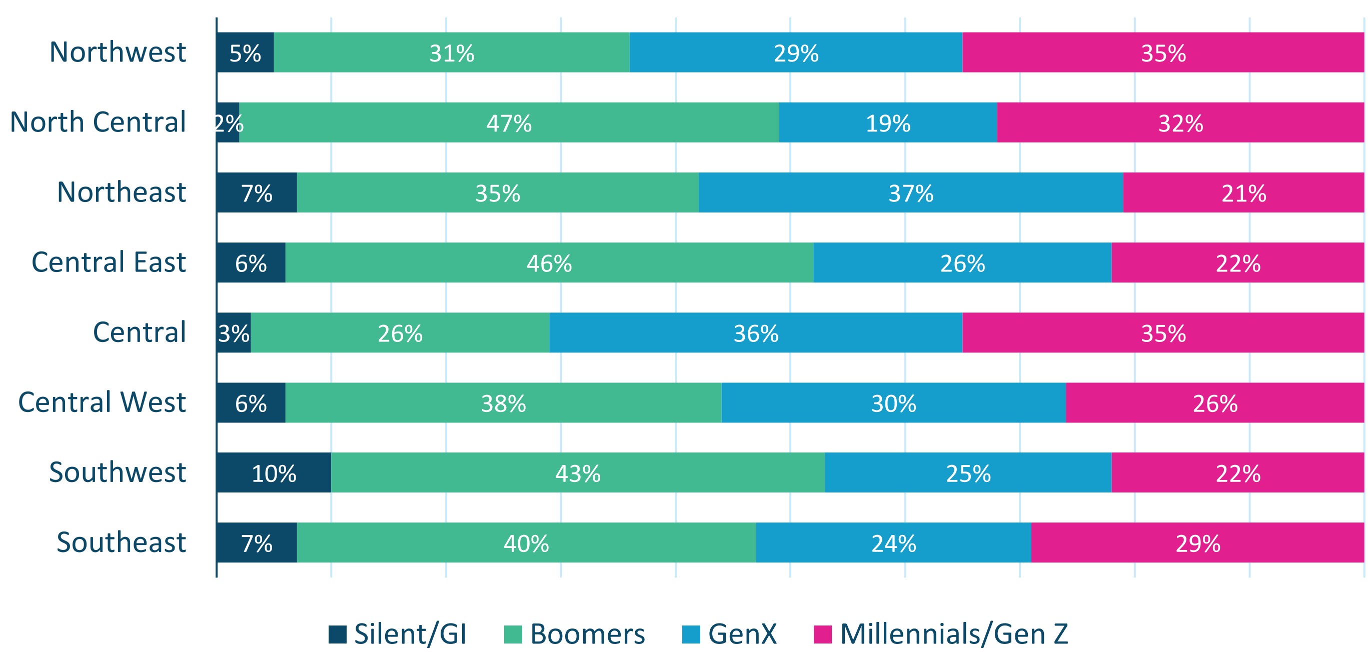
Source: D.K. Shifflet

REGIONAL COMPARISON - 2019 (CONTINUED)

TRAVEL PARTY COMPOSITION & SIZE BY FLORIDA REGION



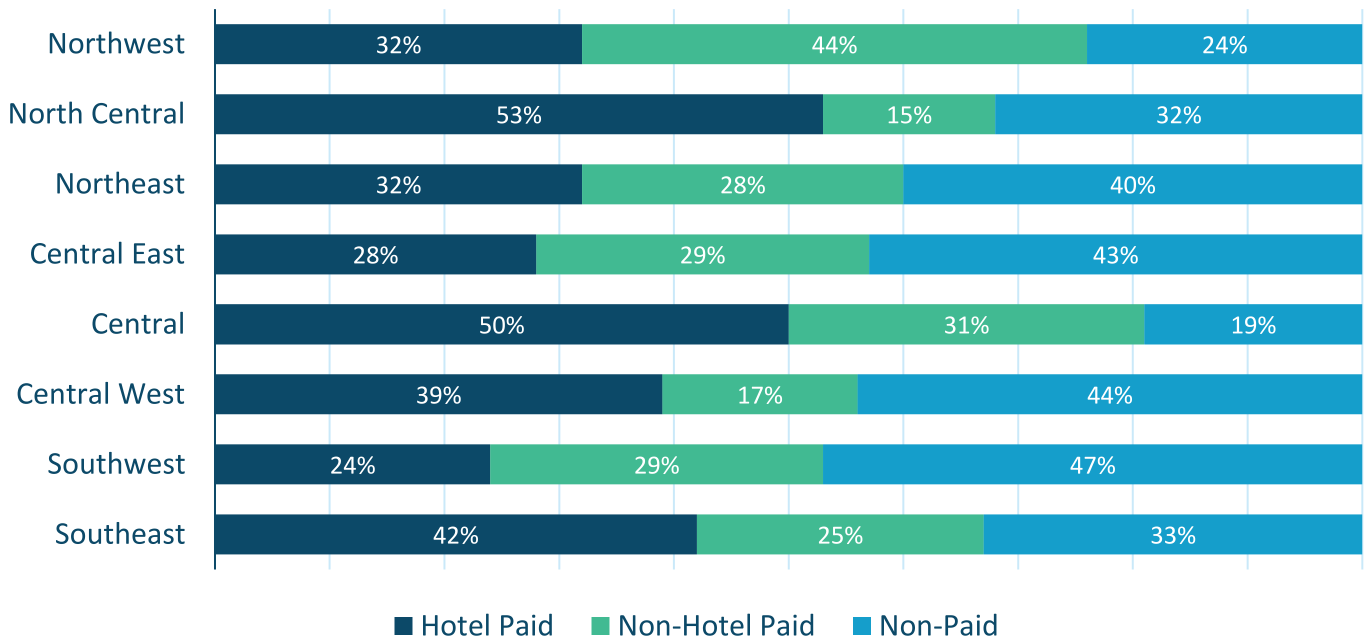
GENERATION BY FLORIDA REGION



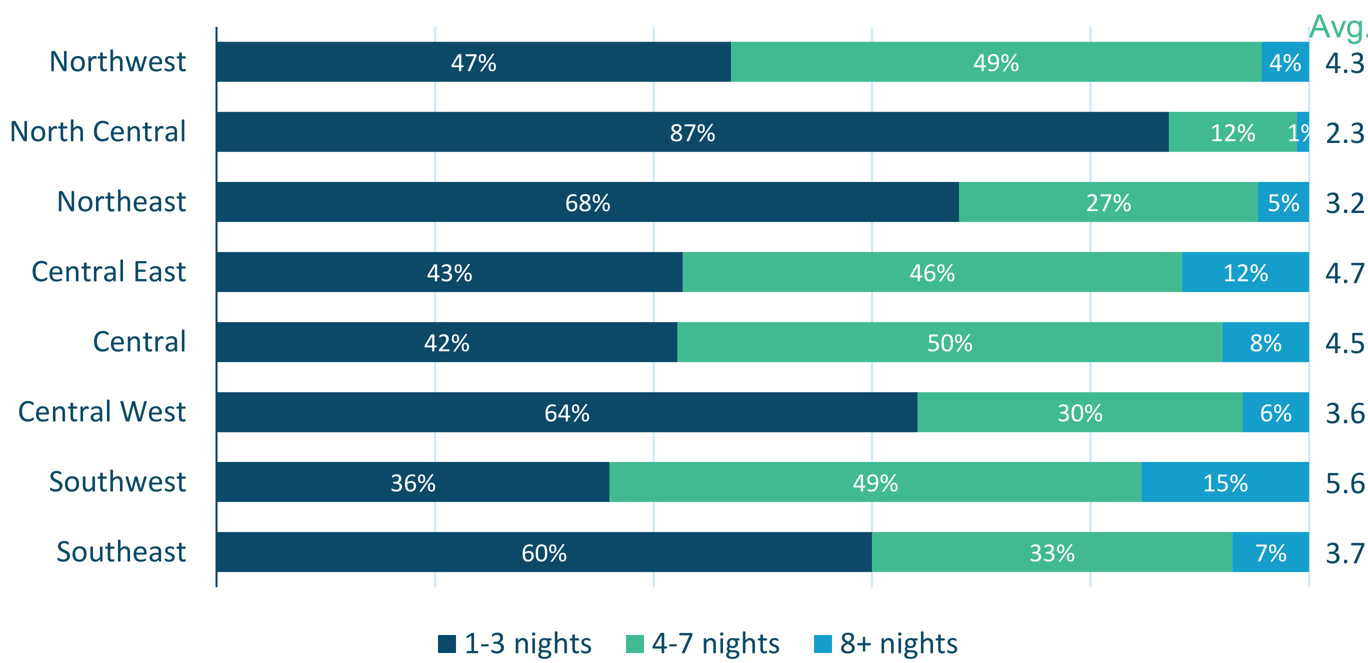
Source: D.K. Shifflet

REGIONAL COMPARISON - 2019 (CONTINUED)

ACCOMMODATION TYPE BY FLORIDA REGION



LENGTH OF STAY BY FLORIDA REGION



Source: D.K. Shifflet

PROFILE OF IN-STATE VISITORS

Prepared by VISIT FLORIDA

Research Department

IN-STATE VISITORS

Summary:

> Floridians who traveled within the sunshine state in 2019 were primarily doing so for leisure (87%). Between 2017 and 2019, the share who were traveling for a getaway weekend increased by 4 percentage points to 28%, while the share traveling to visit friends and relatives fell by 6 percentage points to 19%.

> Spring and Summer were the most popular travel seasons for in-state visitors in 2019, with both seasons having a 28% share of the total. Winter travel declined in popularity between 2017 and 2019, falling from 28% to 23%, while Fall remained the slowest season at 21%.

> The average party size in 2019 was 2.0, up from 1.9 in 2018, as the share of travel parties consisting of families increased by 5 percentage points to 16% and solo adult travel parties fell 4 percentage points to 37%.

> Nearly 40% of in-state travelers visited Central Florida in 2019, making it the top destination for Floridians exploring the Sunshine State. The share visiting Southeast Florida fell by 4 percentage points to 16%, though it retained its position at #2, while Northeast Florida gained 4 percentage points to reach 10%.

> The top origin counties for in-state travelers in 2019 were Miami-Dade (10.9%), Hillsborough (9.3%), and Palm Beach (8.7%). Top destination counties were Orange (31.8%), Hillsborough (9.1%), and Duval (6.3%).

> Visiting friends/relatives (27%), culinary/dining experiences (24%), and beach/waterfront activities (23%) were the most common activities for in-state travelers in 2019. Theme/amusement parks gained popularity between 2017 and 2019, while night life and live music saw notable declines.

> On average, in-state travelers spent $92.98 per person per day in 2019 (excluding transportation), significantly less than domestic out-of-state visitors ($121.20).

> More than three-quarters (77%) of in-state travelers stayed in a hotel in 2019, up from 71% in 2017. Mid-level hotels gained share against both high end and economy properties, increasing from 45% to 51%.

> In-state travelers tended to have shorter stays than their out-of-state domestic counterparts in 2019, with an average length of stay of 2.3 nights compared to 4.2 nights for non-Floridians.

> The share of in-state travelers who planned their trip one week or less in advance of departure increased 4 percentage points to 34% between 2018 and 2019, while those who planned 4 months or more in advance grew 2 percentage points to 11%.

> The most popular travel resources used by in-state travelers in 2019 were past experience (28%), hotel chain websites (20%), and friend/family recommendation (15%). The share of visitors using past experience declined 9 percentage points between 2017 and 2019, while hotel chain websites increased by 5 percentage points.

> The average age of in-state visitors declined from 50.7 to 49.7 between 2018 and 2019, as the share of Millennial and Gen Z travelers grew 6 percentage points to 32%. This shift coincided with an increase in the percentage of visitors belonging to the Young & Free (18-34; any income; no kids) and Young Family (18-34; any income; kids in household) life stages.

> Floridians traveling in state skewed more affluent in 2019 than they had the previous year, as average household income grew from $90,600 to $96,300. In-state travelers were significantly less affluent than domestic out-of-state travelers, who averaged $116,419 in 2019.

IN-STATE VISITORS

PRIMARY PURPOSE OF TRIP

The share of in-state visitors traveling for leisure declined in 2019 to 87%, down 2 percentage points from the previous year. Getaway weekends were the most common purpose of trip for in-state travelers (28%), followed by visiting friends and relatives (19%). In-state visitors were considerably less likely to report a general vacation as their primary trip purpose in 2019 (16%) than were out-of-state domestic visitors (44%). However, in-state visitors were more likely to be traveling for business (13%) than their our-of-state counterparts (7%).

	2017	2018	2019	Change '19/'18
Leisure	**87%**	**89%**	**87%**	▼
Getaway Weekend	24%	29%	28%	—
Visit Friends/Relatives	25%	20%	19%	—
General Vacation	14%	17%	16%	—
Special Event	13%	12%	11%	—
Other Leisure/Personal	11%	11%	13%	▲
Business	**13%**	**11%**	**13%**	▲
Seminar/Training	3%	2%	3%	—
Convention (business)	2%	2%	2%	—
Other Business	8%	7%	8%	—

TRANSPORTATION TYPE

	2017	2018	2019	Change '19/'18
Air	2.0%	3.1%	1.8%	—
Non-Air	98.0%	96.9%	98.2%	—

SEASONALITY

Summer and Spring were the most popular months for in-state visitors to travel in 2019, accounting for a combined 55% of the total. Winter travel fell in popularity by 5 percentage points to 23% between 2017 and 2019, while Fall travel was flat at 21%.

	2017	2018	2019	Change '19/'18
Winter (Dec, Jan, Feb)	28%	26%	23%	▼
Spring (Mar, Apr, May)	26%	20%	28%	▲
Summer (Jun, Jul, Aug)	25%	33%	28%	▼
Fall (Sept, Oct, Nov)	21%	21%	21%	—

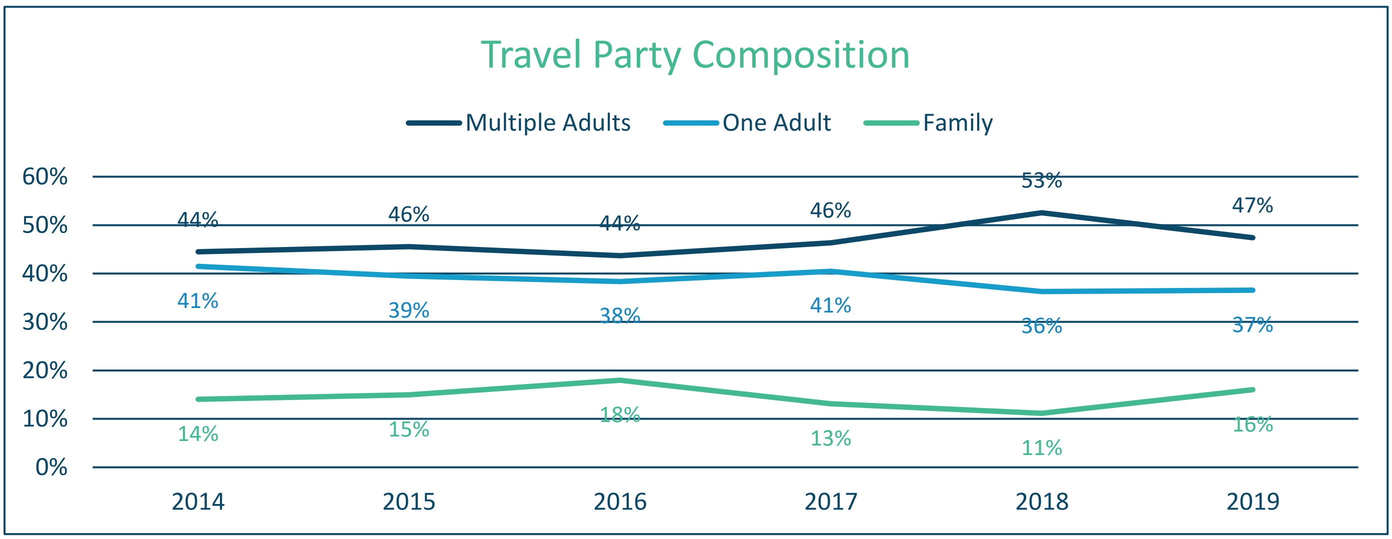
Sources: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

IN-STATE VISITORS (CONTINUED)

TRAVEL PARTY COMPOSITION

The share of families among in-state travel parties grew by 5 percentage points in 2019 to reach 16%, contributing to an increase in average travel party size from 1.9 to 2.0.

	2017	2018	2019	Change '19/'18
One Male and One Female	36%	41%	37%	▼
One Adult	41%	36%	37%	—
Families	13%	11%	16%	▲
Two Males or Two Females	6%	6%	5%	—
Three or More Adults	4%	6%	5%	—
Average Party Size	**1.9**	**1.9**	**2.0**	▲



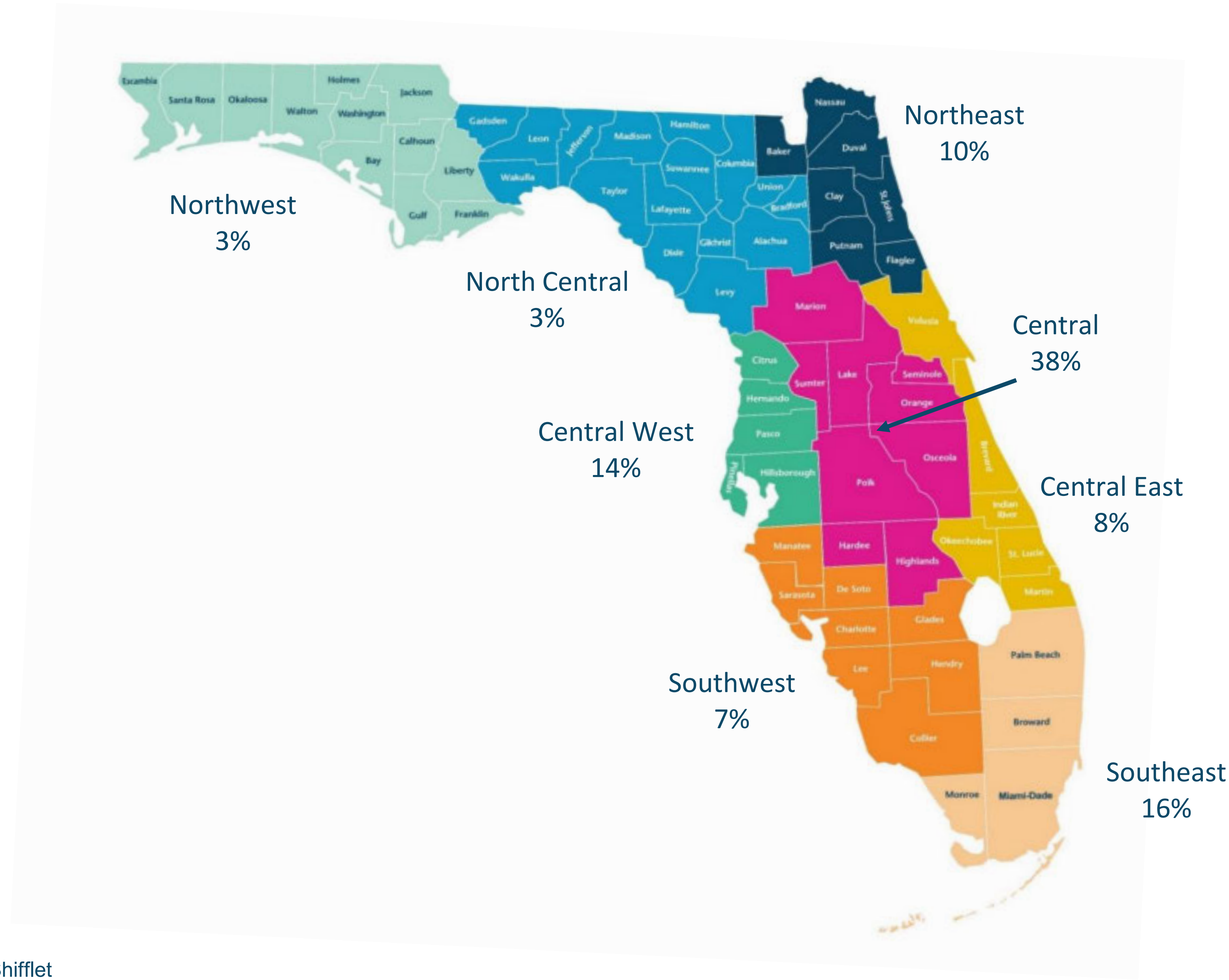
FLORIDA DESTINATION REGIONS

	2017	2018	2019	Change '19/'18
Central	37%	37%	38%	—
Southeast	18%	20%	16%	▼
Central West	14%	15%	14%	—
Northeast	8%	6%	10%	▲
Central East	9%	7%	8%	—
Southwest	5%	7%	7%	—
Northwest	2%	3%	3%	—
North Central	5%	5%	3%	▼

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

IN-STATE VISITORS (CONTINUED)

FLORIDA DESTINATION REGIONS



Source: D.K. Shifflet

IN-STATE VISITORS (CONTINUED)

TOP ORIGIN COUNTIES

Rank	County	2017	2018	2019	Change '19/'18
1	Miami-Dade	6.1%	11.4%	10.9%	▼
2	Hillsborough	8.0%	5.6%	9.3%	▲
3	Palm Beach	8.4%	6.6%	8.7%	▲
4	Orange	6.8%	8.0%	7.8%	—
5	Broward	8.3%	6.9%	6.9%	—
6	Duval	3.3%	5.1%	4.8%	—
7	Lee	3.3%	2.5%	4.2%	▲
8	Pinellas	6.1%	4.5%	3.8%	▼
9	Pasco	3.2%	2.8%	3.3%	▲
10	Volusia	2.9%	3.1%	3.2%	—
11	Brevard	2.1%	2.5%	2.7%	—
12	Polk	2.9%	5.2%	2.5%	▼
13	Leon*	1.4%	1.9%	2.1%	—
14	Collier*	1.1%	1.4%	2.1%	▲
15	Lake*	0.7%	2.6%	2.1%	▼

TOP DESTINATION COUNTIES

Rank	County	2017	2018	2019	Change '19/'18
1	Orange	29.0%	30.8%	31.8%	▲
2	Hillsborough	8.5%	9.2%	9.1%	—
3	Duval	2.9%	2.7%	6.3%	▲
4	Broward	5.4%	4.8%	4.3%	▼
5	Pinellas	4.4%	4.3%	4.1%	—
6	Miami-Dade	5.7%	6.9%	4.1%	▼
7	Volusia	4.6%	3.5%	4.0%	▲
8	Monroe	3.3%	4.0%	3.9%	—
9	Palm Beach	3.9%	3.9%	3.6%	—
10	Lee	1.3%	2.7%	2.8%	—
11	St Johns	3.7%	2.6%	2.7%	—
12	Sarasota	1.5%	1.4%	2.4%	▲
13	Brevard	2.5%	2.0%	2.3%	—
14	Polk*	1.9%	2.6%	1.6%	▼
15	Leon	2.2%	1.4%	1.4%	—

Source: D.K. Shifflet; Arrows indicate change of at least 0.5 percentage points; * small sample size

IN-STATE VISITORS (CONTINUED)

ACTIVITIES DURING TRIP

The most popular activity for Florida residents traveling within Florida in 2019 was visiting friends and relatives (27%), followed by culinary and dining experiences (24%). Twenty-three percent of in-state visitors engaged in a beach or waterfront activity in 2019, compared to 44% of domestic out-of-state visitors. Visiting theme parks increased 3 percentage points from 2017 to 2019.

Activity (Multiple Response)	2017	2018	2019	Change '19/'18
Visit Friends/Relatives	31%	26%	27%	—
Culinary/Dining Experience	22%	26%	24%	▼
Beach/Waterfront	23%	25%	23%	▼
Shopping	21%	20%	19%	—
Theme/Amusement/Water Park	10%	14%	13%	—
Nightlife (bar, nightclub, etc.)	17%	12%	12%	—
Touring/Sightseeing	11%	11%	11%	—
Live Music	12%	10%	8%	▼
Personal Celebration (anniversary, etc.)	10%	9%	8%	—
Parks (national, state, etc.)	7%	7%	7%	—
Historic Sites	7%	7%	7%	—
Movies	10%	5%	6%	—
Amateur Sports (attend/participate)	5%	3%	5%	▲
Fishing	8%	3%	5%	▲
Business/Work	5%	7%	5%	▼
Festival/Fairs (state, craft, etc.)	5%	5%	5%	—
Holiday Celebrations (Thanksgiving, etc.)	7%	6%	5%	—
Museum, Art Exhibits, etc.	5%	5%	4%	—
Show: Boat, Car, Home	5%	4%	4%	—
Boating/Sailing	4%	3%	4%	—
Wildlife Viewing (birds, whales, etc.)	3%	2%	3%	—
Biking	2%	2%	3%	—
Gambling (slots, cards, horses, etc.)	3%	4%	3%	—
Water Sports	2%	2%	3%	—
Theater/Dance Performance	1%	3%	3%	—
Medical/Health/Doctor Visit	3%	3%	3%	—
Winery/Distillery/Brewery Tours	2%	2%	2%	—
Golfing	2%	2%	2%	—
Reunion/Graduation	2%	2%	2%	—
Zoo/Aquarium	1%	2%	2%	—
Other Activities	2%	3%	2%	—

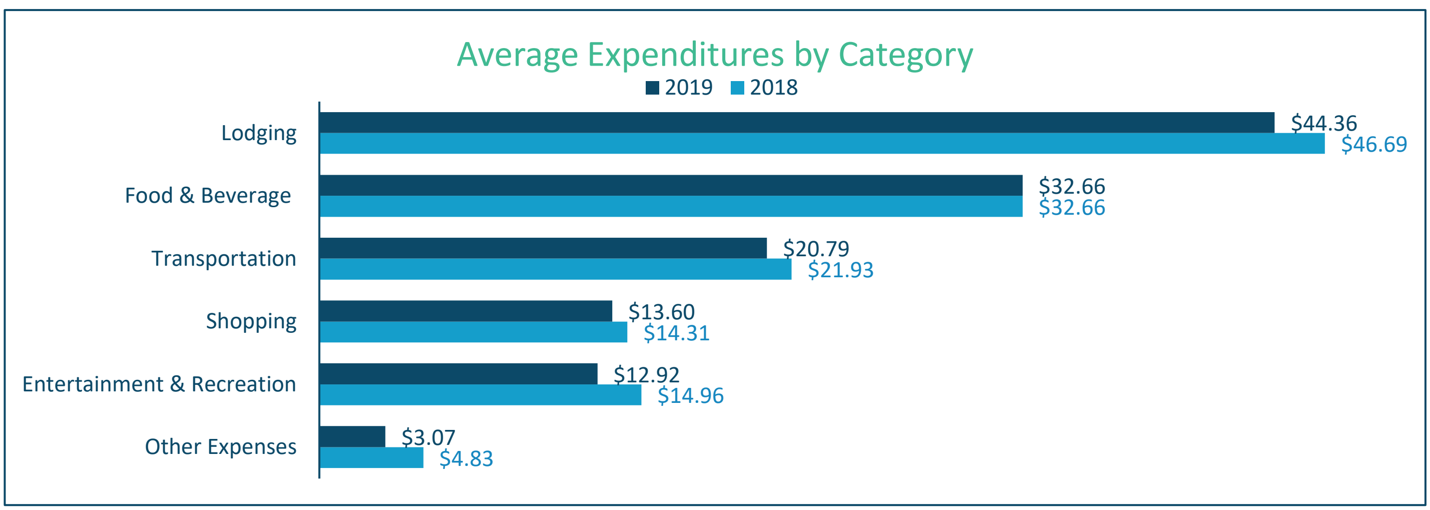
Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

IN-STATE VISITORS (CONTINUED)

AVERAGE EXPENDITURES PER PERSON PER DAY

Florida residents traveling within the state spent an average of $113.77 per person per day (including transportation) in 2019, a 4% decrease from the previous year. This was in contrast to a 4% increase in average spend by out-of-state domestic visitors. There were declines in average spend across all of the major categories of expenditure, including lodging (-5%) and transportation (-5%). Despite an overall decline in transportation expenditures, the average spend on rental cars (for travelers who rented them) grew 8% to reach $41.77 and the average spend on airfare (for travelers who flew) grew by 2% to $55.14.

	2017	2018	2019	Change '19/'18
Avg. Expenditures (incl. transportation)	**$104.58**	**$118.28**	**$113.77**	**-4%**
Avg. Expenditures (excl. transportation)	**$85.44**	**$96.36**	**$92.98**	**-4%**
Lodging - Total	$41.77	$46.69	$44.36	-5%
Lodging - Room	*$45.26*	*$49.51*	*$47.67*	*-4%*
Lodging - Services (internet, parking, etc.)	*$4.06*	*$8.56*	*$5.73*	*-33%*
Transportation - Total	$19.14	$21.93	$20.79	-5%
Transportation - Airfare	*$30.26*	*$54.01*	*$55.14*	*2%*
Transportation - Rental Car	*$47.29*	*$38.69*	*$41.77*	*8%*
Transportation - Other (taxi, bus , gas, etc.)	*$14.33*	*$15.63*	*$15.16*	*-3%*
Food & Beverage	*$29.98*	*$33.29*	*$32.66*	*-2%*
Entertainment & Recreation	$13.13	$14.96	$12.92	-14%
Shopping	$12.55	$14.31	$13.60	-5%
Other Expenses	$3.37	$4.83	$3.07	-36%



[1] December 2019 12-month percentage change in CPI was 2.3%. Source: U.S. Bureau of Labor Statistics.

Source: D.K. Shifflet

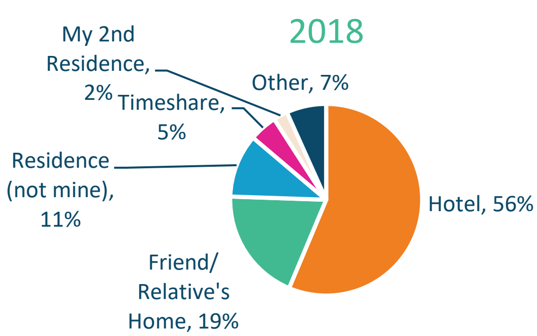
IN-STATE VISITORS (CONTINUED)

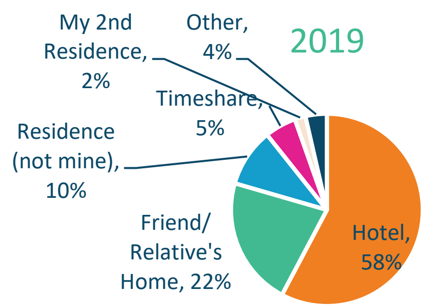
PAID VS. NON-PAID ACCOMMODATIONS

The share of in-state travelers staying in paid accommodations grew by 6 percentage points to 77% between 2017 and 2019, driven largely by an increase in the share staying in hotels (58%). The share staying in the home of a friend or relative, typically a non-paid arrangement, also saw an inrease, growing from 19% in 2018 of in-state visitors to 22% in 2019.

	2017	2018	2019	Change '19/'18
Paid	**71%**	**76%**	**77%**	—
Hotel Paid	*54%*	*58%*	*58%*	—
Non-Hotel Paid	*18%*	*18%*	*19%*	—
Non-Paid	**29%**	**24%**	**23%**	—

ACCOMMODATION TYPE





HOTEL LEVEL

In-state travelers staying in hotels in 2019 were more likely to stay in a mid-level property in 2019 than in the previous year (51% vs. 44%). The share staying in a high end property fell 4 percentage points to 32%, a change reflected in a -5% decline in average lodging expenditures.

	2017	2018	2019	Change '19/'18
High End	**36%**	**36%**	**32%**	▼
Luxury	9%	9%	7%	▼
Upscale	28%	28%	25%	▼
Mid-Level	**45%**	**44%**	**51%**	▲
Upper Moderate	16%	17%	19%	▲
Moderate	29%	28%	32%	▲
Economy	**19%**	**19%**	**16%**	▼
Lower Moderate	11%	10%	7%	▼
Budget	8%	10%	9%	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

IN-STATE VISITORS (CONTINUED)

LENGTH OF STAY

Florida residents traveling within the state had a longer average length of stay in 2019 (2.3 nights) than in 2017 (2.2 nights). This shift was attributable to a decline in the share of in-state travelers staying 3 nights or fewer, which fell from 88% in 2017 to 85% in 2019. In-state travelers had a shorter length of stay thand domestic out-of-state visitors, as the former are more likely to take weekend getaways as opposed to longer vacations.

	2017	2018	2019	Change '19/'18
1-3 nights	88%	85%	85%	—
4-7 nights	11%	13%	13%	—
8+ nights	1%	2%	1%	—
Average Nights in Florida	**2.2**	**2.3**	**2.3**	—

ACCOMMODATION RESERVATION TYPE

More than three-fifths (62%) of in-state travelers booked their accommodations through an online source in 2019, with hotel chain websites being the most common (38%). The share of visitors making reservations online grew by 12 percentage points between 2018 and 2019, while the share making a reservation directly through the accommodation fell by 4 percentage points and the share whose reseravation was part a package fell by 3 percentage points.

	2017	2018	2019	Change '19/'18
Made Reservation	**92%**	**88%**	**92%**	▲
Online	50%	50%	62%	▲
Hotel Chain Website	*30%*	*27%*	*38%*	▲
Travel Website	*14%*	*11%*	*12%*	—
Hotel Mobile App	*5%*	*6%*	*8%*	▲
Non Hotel Accommodations site/app	*-*	*5%*	*4%*	—
*Other Website**	*2%*	*1%*	*1%*	—
Called Directly	29%	21%	17%	▼
As Part of a Package	5%	8%	5%	▼
Travel Agent	1%	2%	1%	—
Other	7%	8%	7%	—
No Reservation	**8%**	**12%**	**8%**	▼

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

IN-STATE VISITORS (CONTINUED)

TRIP PLANNING TIME FRAME

More than one-third (34%) of in-state travelers planned their trip a week or less in advance of departure in 2019, up 4 percentage points from the previous year. Despite this, the share who planned their trip a month or more in advance increased 5 percentage points to 51% over the same period.

	2017	2018	2019	Change '19/'18
1 Week or Less	31%	30%	34%	▲
2-3 Weeks	23%	24%	15%	▼
1 Month	19%	18%	21%	▲
2-3 Months	20%	19%	19%	—
4-5 Months	4%	5%	5%	—
6 Months	2%	2%	2%	—
More Than 6 Months	2%	2%	3%	—

TRIP PLANNING RESOURCES USED

The most popular trip planning resource among in-state travelers in 2019 was past experience (28%), despite falling 5 percentage points from the previous year. Hotel chain websites ranked second with a 20% share of in-state travelers, followed by recommendations from friends and family with 15%. In-state travelers were less likely to rely on past experience and the advice of friends and family than were domestic out-of-state visitors in 2019, but were more likely to use hotel chain websites. There were no such differences in the share who did not use a resource.

	2017	2018	2019	Change '19/'18
Used Resource	**77%**	**76%**	**78%**	▲
Past Experience	37%	33%	28%	▼
Hotel Chain Websites	15%	17%	20%	▲
Friend/Family Recommendation	16%	15%	15%	—
Internet Search [Bing, Google, etc.]	12%	12%	14%	▲
Mapping Websites [Google Maps, etc.]	9%	8%	10%	▲
Travel Booking Website [Orbitz, Expedia, etc	5%	7%	8%	—
Guest Ratings and Review Websites [TripAd	7%	6%	8%	▲
Other	4%	6%	5%	—
Attraction Websites	6%	6%	5%	—
Destination Websites	4%	5%	4%	—
No Resource Used	**23%**	**24%**	**22%**	▼

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

IN-STATE VISITORS (CONTINUED)

AGE OF ADULT TRAVELERS

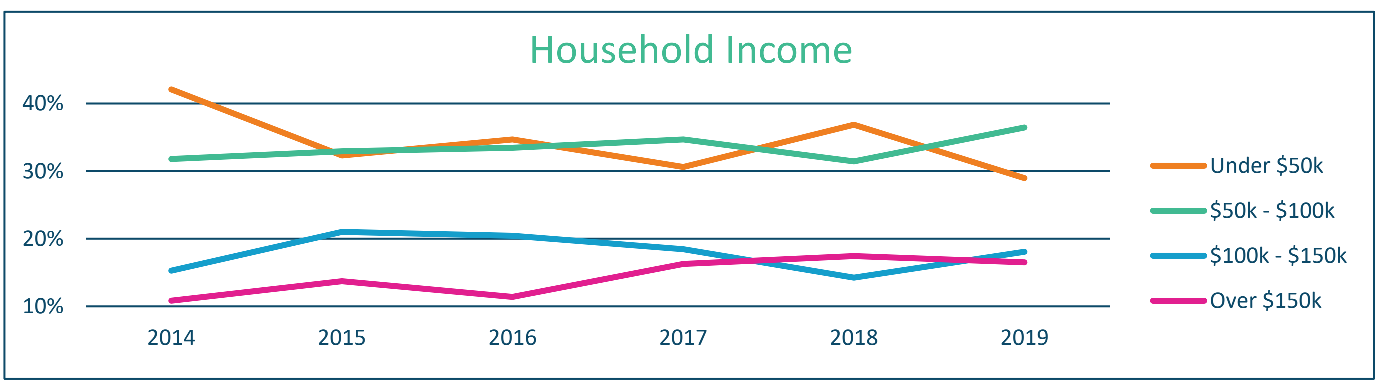
On average, in-state travelers were older (49.7) than domestic out-of-state travelers (49.3) in 2019. The share of in-state travelers in the youngest cohort (18-34) grew by 3 percentage points to 24% in 2019, while the share of visitors in the 50-64 cohort fell 4 percentage points to 25%.

	2017	2018	2019	Change '19/'18
18 - 34 Years Old	21%	21%	24%	▲
35 - 49 Years Old	27%	27%	26%	—
50 - 64 Years Old	29%	29%	25%	▼
65+ Years Old	24%	24%	24%	—
Average Age	**50**	**51**	**50**	▼

HOUSEHOLD INCOME

The average household income of a Florida resident who traveled in state in 2019 grew by 6% from the previous year to $96,300. This was driven by an 8 percentage point decline in the share of in-state travelers who had an income under $50,000 (29% in 2019) and an increase of 3 percentage points in the share with incomes of $100,000 or higher (35% in 2019).

	2017	2018	2019	Change '19/'18
Under $35,000	18%	20%	15%	▼
$35,000 - $49,999	13%	17%	14%	▼
$50,000 - $74,999	17%	17%	22%	▲
$75,000 - $99,999	18%	14%	15%	—
$100,000 - $149,999	18%	14%	18%	▲
$150,000 - $199,999	9%	12%	10%	▼
$200,000+	7%	6%	7%	—
Average Household Income	**$96,400**	**$90,600**	**$96,300**	6%



Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

IN-STATE VISITORS (CONTINUED)

GENERATION

In-state travelers were significantly more likely to belong to the Millennial or Gen Z cohorts in 2019 (32%) than in the previous year (26%), a trend in line with the decline in the average age of in-state travelers. The share of in-state travelers who belonged to Gen X (26% in 2019) fell by 3 percentage points, as did the share belonging to the Silent and G.I. generations.

	2017	2018	2019	Change '19/'18
Millennials/Gen Z (1981 to 1997)	25%	26%	32%	▲
GenX (1965-1980)	27%	29%	26%	▼
Boomers (1946 -1964)	40%	37%	37%	—
Silent/GI (1945 or earlier)	8%	8%	5%	▼

LIFESTAGE

Moderate Mature travelers accounted for nearly a quarter (24%) of Florida residents who made an in-state trip in 2019. Despite being the largest lifestage category, Moderate Matures lost 3 percentage points points between 2017 and 2019. By contrast, Young Families grew by 4 percentage points to reach 13% between 2018 and 2019. The share of in-state visitors who had children in their household remained relatively stable between 2017 and 2019.

	2017	2018	2019	Change '19/'18
Young & Free (18-34; any income; no kids)	10%	13%	13%	—
Young Family (18-34; any income; kids in HH)	11%	9%	13%	▲
Maturing & Free (35-54; any income; no kids)	16%	17%	17%	—
Moderate Family (35-54; <$75K; kids in HH)	10%	11%	9%	▼
Affluent Family (35-54; $75K+; kids in HH)	11%	9%	9%	—
Moderate Mature (55 or older, <$100K; no kids)	27%	26%	24%	▼
Affluent Mature (55 or older; $100K+, no kids)	15%	14%	14%	—

Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

PROFILE OF INTERNATIONAL VISITORS TO FLORIDA

Prepared by VISIT FLORIDA Research Department

TOP INTERNATIONAL ORIGIN MARKETS

CALENDAR YEAR 2018
FINAL
in person-trips

RANK	ORIGIN COUNTRY	2017 VISITS	2018 VISITS	% CHANGE	% OF TOTAL
1.	Canada	3,485,000	3,551,000	2%	26%
2.	Brazil	1,180,000	1,371,000	16%	10%
3.	United Kingdom	1,327,000	1,323,000	0%	10%
4.	Argentina	736,000	695,000	-6%	5%
5.	Colombia	501,000	562,000	12%	4%
6.	Mexico	432,000	467,000	8%	3%
7.	Venezuela	413,000	424,000	3%	3%
8.	Germany	462,000	392,000	-15%	3%
9.	France	271,000	289,000	7%	2%
10.	Ecuador	249,000	260,000	4%	2%

RANK	WORLD REGION	2017 VISITS	2018 VISITS	% CHANGE	% OF TOTAL
1.	North America	3,917,000	4,018,000	3%	30%
2.	South America	2,796,000	3,793,000	36%	28%
3.	Europe	2,575,000	3,480,000	35%	26%
4.	Caribbean	721,000	1,010,000	40%	7%
5.	Asia/Oceania	423,000	550,000	30%	4%
6.	Central America	306,000	471,000	54%	3%
7.	Middle East/Africa	176,000	229,000	29%	2%

	2017	2018	% CHANGE
Total International	**13,456,000**	**13,552,000**	**1%**

Sources: VISIT FLORIDA international estimates, excluding Canada, are based on data from the U.S. Department of Commerce and Global Agency Pro; Canadian estimates for 2018 were derived from VISIT FLORIDA analysis of historical data and the most recent available data on trends. 2017 Canadian Estimates were provided by Statistics Canada.

VISITFLORIDA.

TOP INTERNATIONAL ORIGIN MARKETS

CALENDAR YEAR 2019
FINAL
in person-trips

RANK	ORIGIN COUNTRY	2018 VISITS	2019 VISITS	% CHANGE	% OF TOTAL
1.	Canada	*3,551,000*	*4,088,000*	*15%*	*29%*
2.	United Kingdom	1,323,000	*1,334,000*	*1%*	*10%*
3.	Brazil	1,371,000	*1,304,000*	*-5%*	*9%*
4.	Argentina	695,000	*559,000*	*-19%*	*4%*
5.	Colombia	562,000	*550,000*	*-2%*	*4%*
6.	Mexico	467,000	*499,000*	*7%*	*4%*
7.	Germany	392,000	*378,000*	*-3%*	*3%*
8.	Venezuela	424,000	*320,000*	*-24%*	*2%*
9.	France	289,000	*307,000*	*6%*	*2%*
10.	Ecuador	260,000	*246,000*	*-5%*	*2%*

RANK	WORLD REGION	2018 VISITS	2019 VISITS	% CHANGE	% OF TOTAL
1.	North America	*4,018,000*	*4,587,000*	*14%*	*33%*
2.	South America	3,793,000	*3,514,000*	*-7%*	*25%*
3.	Europe	3,480,000	*3,480,000*	*0%*	*25%*
4.	Caribbean	1,010,000	*1,036,000*	*3%*	*7%*
5.	Central America	471,000	*537,000*	*14%*	*4%*
6.	Asia/Oceania	550,000	*516,000*	*-6%*	*4%*
7.	Middle East/Africa	229,000	*218,000*	*-4%*	*2%*

Total International	**13,552,000**	**13,889,000**	**2%**

Sources: VISIT FLORIDA international estimates, excluding Canada, are based on data from the U.S. Department of Commerce and Global Agency Pro; Canadian estimates for 2018 were derived from VISIT FLORIDA analysis of historical data and the most recent available data on trends. 2019 Canadian Estimates were provided by X-Border Canada.

OVERSEAS VISITORS TO FLORIDA

Summary:

> Florida's top overseas origin country in 2019 was Brazil, which sent 1.4 million visitors to the Sunshine State during the year – a 16% increase from 2018. The UK (1.3 million), Argentina (695,000), Colombia (562,000), and Mexico (467,000) rounded out the top 5.

> Among overseas visitors in 2019, leisure was the most common purpose of trip (88%), with vacation/holiday travel accounting for 72% of visitors and visiting friends/relatives accounting for 16%.

> The average party size for overseas visitors was 1.9 in 2019. Half of visitors (50%) traveled alone, 28% with a spouse/partner, and 25% with family/relatives.

> Average expenditures per person per day rose by 9% year-over-year in 2019 to reach $101.

> On average, overseas visitors in planned their trip to Florida 3.8 months (116.8 days) in advance of travel in 2019. Once in Florida, they stayed an average of 11.2 nights.

> The top trip planning sources for overseas visitors in 2019 were airlines (54%), online travel agencies (35%), and personal recommendation (31%).

> For transportation in Florida, overseas visitors most commonly relied on a rented auto (46%), a private or company auto (39%), and air travel between U.S. cities (24%) in 2019.

> When overseas visitors made their air travel reservations in 2019, they did so an average of 90.1 days before departure. About 43% booked directly with the airline, 32% through an internet booking service, and 19% with a travel agency office.

> The share of overseas visitors staying in hotels fell to 72% in 2019, down from 75% in 2017. Private homes increased by 3 percentage points to 32% over the same period.

> Two-thirds of overseas visitors (66%) made lodging reservations for the trip in 2019, with internet booking services (33%) and booking directly with the accommodation (18%) being the most common ways of doing so.

> The top Florida destinations for overseas visitors in 2019 were Miami (54%), Orlando (46%), and Ft. Lauderdale (10%).

- The top activities for overseas visitors in Florida were shopping (87%), sightseeing (70%), and visiting amusement/theme parks (48%) in 2019.
- Overseas visitors to Florida preferred Fall in 2019, with 30% traveling to the Sunshine State between September and November. Summer (25%) and Winter (24%) were also popular.
- Florida's overseas visitors tend to be younger than their domestic and Canadian counterparts. The average age for overseas visitors in 2019 was 41, compared to 48 for domestic visitors and 49 for Canadian visitors.
- The average household income for overseas visitors fell in 2019 from the previous year, declining to $72,500 from $75,800 in 2018.
- For profiles on visitors from specific countries, please see the VISIT FLORIDA Partner Tools, which can be found at https://www.visitflorida.org/research.

OVERSEAS VISITORS TO FLORIDA

PRIMARY PURPOSE OF TRIP

	2017	2018	2019	Change '19/'18
Leisure	**88%**	**89%**	**88%**	—
Vacation/Holiday	75%	75%	72%	▼
Visit Friends/Relatives	13%	14%	16%	▲
Business	**9%**	**8%**	**9%**	—
Transient Business	6%	5%	5%	—
Conference/Convention/Trade Show	4%	4%	4%	—
Other	**3%**	**3%**	**3%**	—

TRAVEL PARTY SIZE

	2017	2018	2019	Change '19/'18
One Adult	49%	50%	50%	—
Two Adults	27%	27%	28%	—
Three or More Adults	5%	5%	5%	—
Traveling with Children	19%	18%	17%	—
Average Total Party Size	**1.9**	**1.9**	**1.9**	—

TRAVEL PARTY COMPOSITION

Composition (Multiple Response)	2017	2018	2019	Change '19/'18
Traveling Alone	49%	50%	50%	—
Traveling with Spouse/Partner	28%	26%	28%	▲
Traveling with Family/Relatives	26%	26%	25%	—
Traveling with Friend(s)	4%	5%	5%	—
Other	2%	1%	1%	—

EXPENDITURES IN U.S.

	2017	2018	2019	Change '19/'18
Per Travel Party/Trip	$3,046	$2,879	$2,905	1%
Per Visitor/Trip	$1,565	$1,521	$1,551	2%
Per Visitor/Day	$101	$93	$101	9%

Source: U.S. Department of Commerce, ITA, National Travel & Tourism Office; Note: This profile excludes visitors from Mexico who arrived in the United States by auto, and all Candian visitors

OVERSEAS VISITORS TO FLORIDA (CONTINUED)

ADVANCE DECISION TO TRAVEL

	2017	2018	2019	Change '19/'18
1 - 30 Days	27%	28%	29%	—
31 - 60 Days	17%	17%	17%	—
61 - 120 Days	23%	23%	23%	—
More than 120 Days	33%	32%	31%	—
Average Number of Days	122.7	120.6	116.8	▼

TRIP PLANNING SOURCES

Source (Multiple Choice)	2017	2018	2019	Change '19/'18
Airline	52%	53%	54%	—
Online Travel Agency	34%	36%	35%	—
Personal Recommendation	30%	31%	31%	—
Travel Agency Office	18%	18%	15%	▼
National/State/City Travel Office	14%	13%	12%	—
Travel Guide	11%	10%	10%	—
Tour Operator/Travel Club	10%	10%	9%	—
Corporate Travel Department	9%	8%	9%	—
Other	5%	5%	5%	—

TRANSPORTATION USED WHILE IN U.S.

Type (Multiple Response)	2017	2018	2019	Change '19/'18
Rented Auto	50%	47%	46%	—
Auto, Private or Company	36%	37%	39%	▲
Air Travel between U.S. Cities	26%	26%	24%	▼
Ride-Sharing Service	12%	16%	18%	▲
Taxicab/Limousine	20%	20%	17%	▼
City Subway/Tram/Bus	14%	13%	13%	—
Bus between Cities	12%	12%	11%	—
Overnight Cruise Ship/River Boat	9%	9%	8%	—
Ferry/Scenic Cruise	6%	5%	5%	—
Railroad between Cities	4%	3%	4%	—
Rented Bicycle/Motorcycle/Moped	2%	3%	2%	—
Motor Home/Camper	0%	0%	1%	—

Source: U.S. Department of Commerce, ITA, National Travel & Tourism Office

OVERSEAS VISITORS TO FLORIDA (CONTINUED)

ADVANCE AIR TRAVEL RESERVATIONS

	2017	2018	2019	Change '19/'18
1 - 30 Days	38%	39%	39%	—
31 - 60 Days	17%	17%	17%	—
61 - 120 Days	21%	21%	22%	—
More than 120 Days	25%	23%	23%	—
Average Number of Days	**95.0**	**92.0**	**90.1**	▼

AIR TRAVEL RESERVATION METHOD

Method (Multiple Response)	2017	2018	2019	Change '19/'18
Directly with the Airline	38%	40%	43%	▲
Internet Booking Service	33%	32%	32%	—
Travel Agency Office	22%	21%	19%	▼
Tour Operator/Travel Club	10%	10%	9%	—
Corporate Travel Department	6%	6%	6%	—
Other	1%	1%	1%	—

TOP REASONS FOR SELECTING AIRLINE

Reason (Select Up to 3)	2017	2018	2019	Change '19/'18
Airfare	59%	58%	55%	▼
Convenient Schedule	43%	42%	42%	—
Non-stop Flights	39%	36%	37%	—
Previous Good Experience	25%	28%	29%	—
On-time Reputation	13%	14%	13%	—
Safety Reputation	14%	14%	13%	—
Mileage Bonus/Freq. Flyer Program	13%	13%	13%	—
Loyalty to Carrier	10%	9%	9%	—
In-flight Service Reputation	8%	8%	8%	—
Other	7%	6%	7%	—

LENGTH OF STAY

	2017	2018	2019	Change '19/'18
Average Nights in Florida	11.0	11.3	11.2	▼

Source: U.S. Department of Commerce, ITA, National Travel & Tourism Office

OVERSEAS VISITORS TO FLORIDA (CONTINUED)

ACCOMMODATIONS

Type (Multiple Response)	2017	2018	2019	Change '19/'18
Hotel/Motel	75%	74%	72%	▼
Private Home	29%	30%	32%	▲
Other	4%	4%	5%	—

LODGING RESERVATIONS

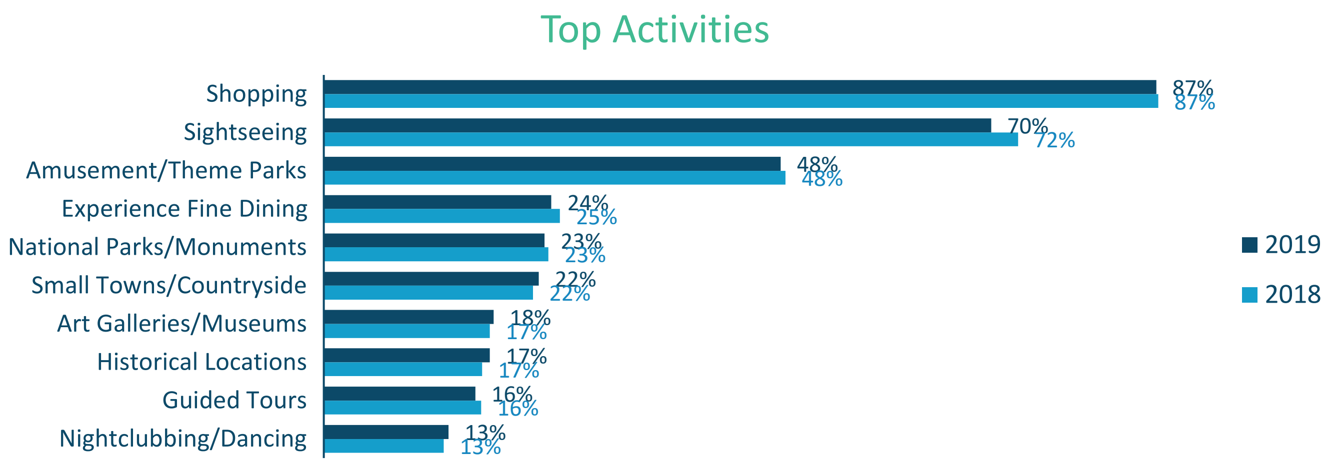
Method (Multiple Response)	2017	2018	2019	Change '19/'18
Yes, Booked through	**68%**	**67%**	**66%**	—
Internet Booking Service	32%	32%	33%	—
Accommodation Directly	17%	18%	18%	—
Travel Agency Office	11%	10%	9%	—
Tour Operator/Travel Club	7%	7%	6%	—
Corporate Travel Department	4%	4%	4%	—
The Airline	2%	1%	2%	—
Other	2%	2%	2%	—
No Reservations	**32%**	**33%**	**34%**	—

FLORIDA DESTINATIONS VISITED

Destination (Multiple Response)	2017	2018	2019	Change '19/'18
Miami	54%	55%	54%	—
Orlando	49%	46%	46%	—
Ft. Lauderdale	10%	10%	10%	—
Tampa-St. Petersburg	6%	5%	6%	—
Florida Keys-Key West	5%	5%	5%	—
West Palm Beach	4%	3%	4%	—
Naples	3%	3%	3%	—
Ft. Myers	3%	3%	3%	—
Sarasota-Bradenton	2%	2%	2%	—
Jacksonville	2%	2%	2%	—
Melbourne	2%	1%	2%	—
Lakeland	1%	1%	1%	—

Source: U.S. Department of Commerce, ITA, National Travel & Tourism Office

OVERSEAS VISITORS TO FLORIDA (CONTINUED)



SEASONALITY

	2017	2018	2019	Change '19/'18
Winter (Dec, Jan, Feb)	22%	28%	24%	▼
Spring (Mar, Apr, May)	26%	24%	22%	▼
Summer (Jun, Jul, Aug)	24%	28%	25%	▼
Fall (Sept, Oct, Nov)	27%	20%	30%	▲

AGE OF ADULT TRAVELERS

	2017	2018	2019	Change '19/'18
18 - 34 Years	37%	34%	34%	—
35 - 44 Years	22%	23%	22%	—
45 - 54 Years	21%	20%	21%	—
55+ Years	20%	23%	23%	—
Median Age	**40**	**41**	**41**	—

HOUSEHOLD INCOME

	2017	2018	2019	Change '19/'18
Under $20,000	23%	26%	26%	—
$20,000 - $59,999	31%	29%	30%	—
$60,000 - $99,999	22%	18%	18%	—
$100,000+	25%	27%	25%	▼
Average HH Income	**$76,222**	**$75,800**	**$72,500**	▼

Source: U.S. Department of Commerce, ITA, National Travel & Tourism Office

CANADIAN VISITORS TO FLORIDA

Summary:

> An estimated 3.6 million Canadians traveled to Florida in 2019.

> Canadians visitors who were primarily traveling to Florida for leisure accounted for 93% of total Canadian visitation in 2019, up from 86% in 2018. Those traveling primarily for business fell by 8 percentage points to 4% over the same period, driven by a decline in conference/convention/trade show travel.

> The average party size for Canadian visitors was 3.0 in 2019, an increase from 2.9 in 2018. The rise in party size can be partly attributed to an increase in the share of Canadians traveling with children, which rose by 9 percentage points to 49% in 2019.

> The most common trip planning sources that Canadian visitors used in 2019 were booking websites at 43%, friends and family at 36%, and social media at 32%.

> Nearly two-thirds of Canadians (65%) reached Florida by air in 2019. While in the U.S., the most common forms of transportation were personal vehicles (32%) and rental car/truck (25%).

> The top activities for Canadian visitors in 2019 were visiting amusement parks (36%), shopping (27%), and general sightseeing (23%). Visiting a beach/short/lake grew in popularity from 2018, as did visiting friends or family.

> Canadian visitors spent an average of 17.0 days in Florida in 2019, and spent an average of $60 per person per day while in destination.

> About three-quarters (77%) of Canadian visitors stayed in a paid accommodation in 2019, with the most common options being hotels (61%) and shared economy (11%). The most common unpaid accommodations were private homes of friends and family (16%) and a second home/condo (8%).

> The most popular season for Canadian travelers to visit in 2019 were Spring (34%) and Winter (34%).

> The average age of Canadian visitors was 49 in 2019.

> Half of Canadians who came to Florida in 2019 resided in Ontario (51%), while Quebec accounted for nearly a quarter (24%) and the Atlantic Provinces for 10%.

CANADIAN VISITORS TO FLORIDA

Data for 2017 were provided by Statistics Canada. Data for 2018 and 2019 were provided by X-Border Canada. Due to the change in data sources, some specific data points may not be available for 2017 due to differences in the surveys used to collect the data. In those instances, there will be a dash in the table where the 2017 data would be.

PRIMARY PURPOSE OF TRIP

	2017	2018	2019	Change '19/'18
Leisure	**86%**	**93%**	**93%**	—
Vacation/Holiday	69%	62%	65%	▲
Other Personal Reasons	10%	16%	14%	▼
Second Home or Winter Stay	-	8%	7%	—
Visit Friends/Relatives	8%	6%	7%	—
Business	**12%**	**4%**	**4%**	—
Transient Business	4%	2%	4%	▲
Conference/Convention/Trade Show	8%	2%	1%	—
Other	**2%**	**4%**	**3%**	—

TRAVEL PARTY SIZE

	2017	2018	2019	Change '19/'18
One Person	14%	11%	12%	—
Two People	47%	47%	46%	—
Three or More People	38%	42%	43%	—
Average Total Party Size	**2.1**	**2.9**	**3.0**	▲

TRAVEL PARTY COMPOSITION

Composition (Multiple Response)	2017	2018	2019	Change '19/'18
Traveling with Spouse/Partner	-	73%	71%	▼
Traveling with Child(ren)	23%	40%	49%	▲
Traveling with Family/Relatives	-	27%	32%	▲
Traveling with Friend(s)	-	17%	12%	▼
Traveling Alone	14%	7%	7%	—
Other	-	2%	2%	—

Source: Statistics Canada, X-Border Canada

CANADIAN VISITORS TO FLORIDA (CONTINUED)

ADVANCE DECISION TO TRAVEL

	2017	2018	2019	Change '19/'18
1 - 30 Days	-	28%	31%	▲
31 - 60 Days	-	19%	18%	—
61 - 90 Days	-	13%	9%	▼
More than 90 Days	-	40%	42%	▲
Average Number of Days	-	123.8	116.3	▼

TRIP PLANNING SOURCES

Source (Multiple Response)	2017	2018	2019	Change '19/'18
Booking websites (Expedia, hotels, etc.)	-	50%	43%	▼
Friends and family	-	36%	36%	—
Social Media	-	31%	32%	—
Destination websites	-	28%	27%	—
Travel Agents	-	15%	21%	▲
Other websites	-	19%	18%	—
Guide Books	-	17%	15%	▼
Visitor Information Centers	-	13%	10%	▼
Ordering travel guides from destinations	-	9%	9%	—
Travel/Home/Adventure Shows	-	7%	8%	—
Magazine/Newspaper articles/Ads	-	7%	7%	—
News stories (online/print)	-	7%	4%	▼

TYPE OF BOOKING WEBSITE USED

Source (Multiple Response)	2017	2018	2019	Change '19/'18
Expedia	-	62%	55%	▼
Airline	-	50%	45%	▼
Hotels	-	45%	39%	▼
Travelocity	-	10%	17%	▲
Attractions	-	17%	16%	—
Cruise lines	-	20%	16%	▼
Discount sites	-	14%	16%	▲
Tour companies	-	6%	5%	—
Other	-	11%	14%	▲

Source: Statistics Canada, X-Border Canada

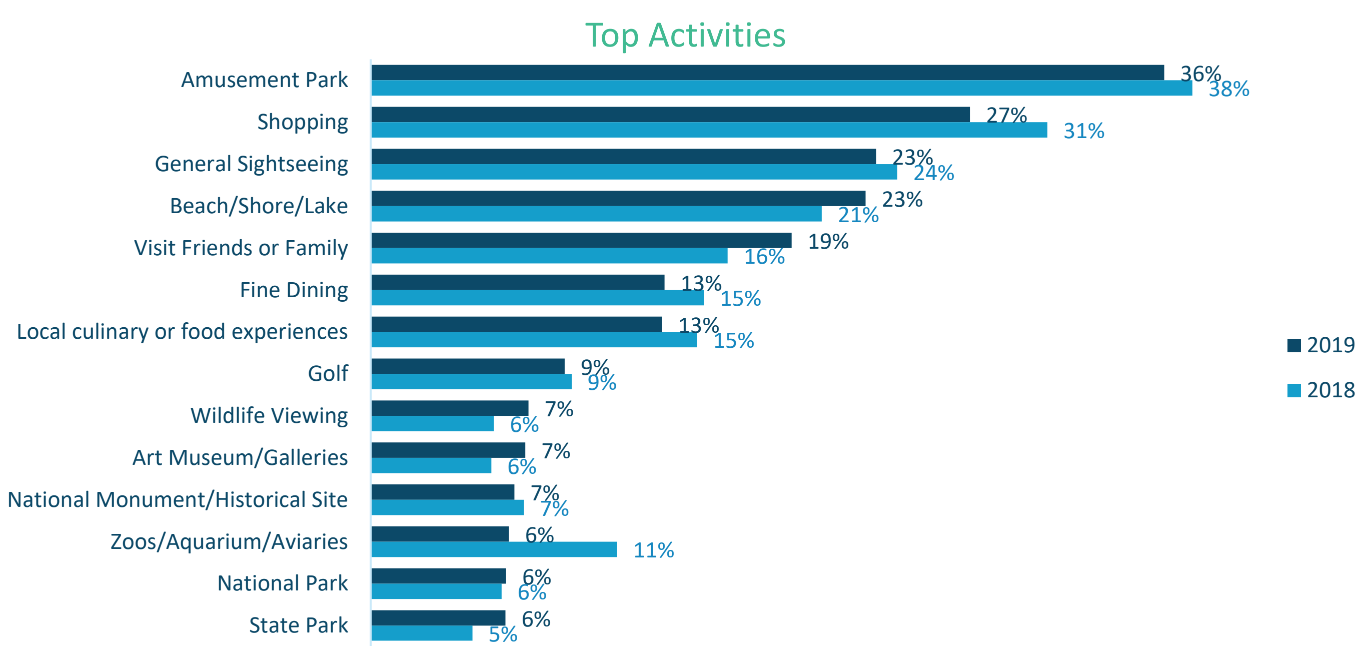
CANADIAN VISITORS TO FLORIDA (CONTINUED)

TRANSPORTATION MODE USED TO TRAVEL TO U.S.

	2017	2018	2019	Change '19/'18
Airplane	67%	66%	65%	—
Personal Vehicle	31%	30%	31%	—
Other	2%	4%	4%	—

TRANSPORTATION MODE USED WITHIN U.S.

Mode (Multiple Response)	2017	2018	2019	Change '19/'18
Personal Vehicle	-	32%	32%	—
Rental car/truck	-	27%	25%	▼
Taxi/Ride share	-	11%	10%	—
Airplane	-	9%	9%	—
Walked/Bicycle	-	7%	8%	—
Bus	-	5%	8%	▲
City bus/trolley/subway	-	6%	4%	▼
Ship/Boat/Ferry	-	3%	4%	—
RV/Camper/Motorhome	-	3%	2%	—
Other	-	2%	1%	—



Source: Statistics Canada, X-Border Canada

CANADIAN VISITORS TO FLORIDA (CONTINUED)

ACCOMMODATIONS

Type (Multiple Response)	2017	2018	2019	Change '19/'18
Paid Accommodations	**-**	**85%**	**77%**	▼
Hotel/Motel	-	71%	61%	▼
Shared Economy	-	10%	11%	—
Timeshare	-	7%	8%	—
RV/Campground/Tent	-	1%	2%	—
Bed and Breakfast	-	1%	1%	—
Unpaid Accommodations	**-**	**22%**	**24%**	▲
Private home of friend/family	-	16%	16%	—
Your second home/condo	-	6%	8%	▲
Other	**-**	**6%**	**7%**	—

LENGTH OF STAY

	2017	2018	2019	Change '19/'18
1-3 Nights	10%	17%	21%	▲
4-13 Nights	54%	57%	55%	—
14+ Nights	36%	26%	24%	▼
Average Nights in Florida	21.2	16.7	17.0	▲

EXPENDITURES IN FLORIDA

	2017	2018	2019	Change '19/'18
Per Travel Party Per Trip	$2,241	$3,143	$3,132	▼
Per Person Per Trip	$1,062	$1,067	$1,059	▼
Per Person Per Day	$48	$61	$60	▼

SEASONALITY

	2017	2018	2019	Change '19/'18
Winter (Dec, Jan, Feb)	-	29%	34%	▲
Spring (Mar, Apr, May)	-	39%	34%	▼
Summer (Jun, Jul, Aug)	-	15%	17%	▲
Fall (Sept, Oct, Nov)	-	17%	15%	▼

Source: Statistics Canada, X-Border Canada

CANADIAN VISITORS TO FLORIDA (CONTINUED)

AGE OF ADULT TRAVELERS

	2017	2018	2019	Change '19/'18
18 - 24 Years	-	9%	9%	—
25 - 39 Years	-	24%	20%	▼
40 - 54 Years	-	27%	29%	▲
55+ Years	-	40%	42%	▲
Median Age	**-**	**49**	**49**	—

EMPLOYMENT STATUS

	2017	2018	2019	Change '19/'18
Work Full Time	-	40%	37%	▼
Work Part Time	-	32%	36%	▲
Do Not Work	-	28%	26%	▼

PROVINCE OF RESIDENCE

	2017	2018	2019	Change '19/'18
Ontario	56%	50%	51%	—
Quebec	28%	27%	24%	▼
Atlantic Provinces	6%	8%	10%	▲
Manitoba	2%	2%	5%	▲
Alberta	4%	7%	5%	▼
British Columbia	3%	3%	4%	—
Other	1%	2%	1%	—

Source: Statistics Canada, X-Border Canada

DATA METHODOLOGY FOR INTERNATIONAL VISITORS

INTERNATIONAL VISITOR ESTIMATES

VISIT FLORIDA's estimates of Canadian visitation to the state were produced by Statistics Canada for 2017. For 2018, the estimates were produced by VISIT FLORIDA based on data from Statistics Canada and the Conference Board of Canada. For 2019, they were produced by X-Border Canada.

VISIT FLORIDA's estimates of overseas visitor volume are derived from data from the I-94 produced by the U.S. Department of Commerce, National Travel and Tourism Office, and data from Global Agency Pro.

INTERNATIONAL VISITOR PROFILES

VISIT FLORIDA's analyses of the characteristics of international visitors (excluding Canada) to Florida are produced from custom re-tabulations of data extracted from the In-Flight Survey of International Air Travelers conducted by the National Travel and Tourism Office which is located within the International Trade Administration of the U.S. Department of Commerce. There is a considerable lag in the compilation of this data, with data for the previous year not becoming available until June of the current calendar year.

VISIT FLORIDA has used the numbers from the Department of Commerce for more than a decade and the Travel Industry Association of America reports draw from the same source for its reports on international travel to the U.S. For additional information on overseas visitors to the U.S., visit https://travel.trade.gov/.

VISIT FLORIDA's analysis of the trends and characteristics of Canadian visitors in 2017 is based on data purchased from Statistics Canada, and in 2018-2019 is based on data from X-Border Canada. Because of the change in data sources, there are some individual data points which were included in the X-Border Canada data but not in the Statistics Canada data, so some data for 2017 is not included in this study.

FLORIDA TOURISM INDICATORS

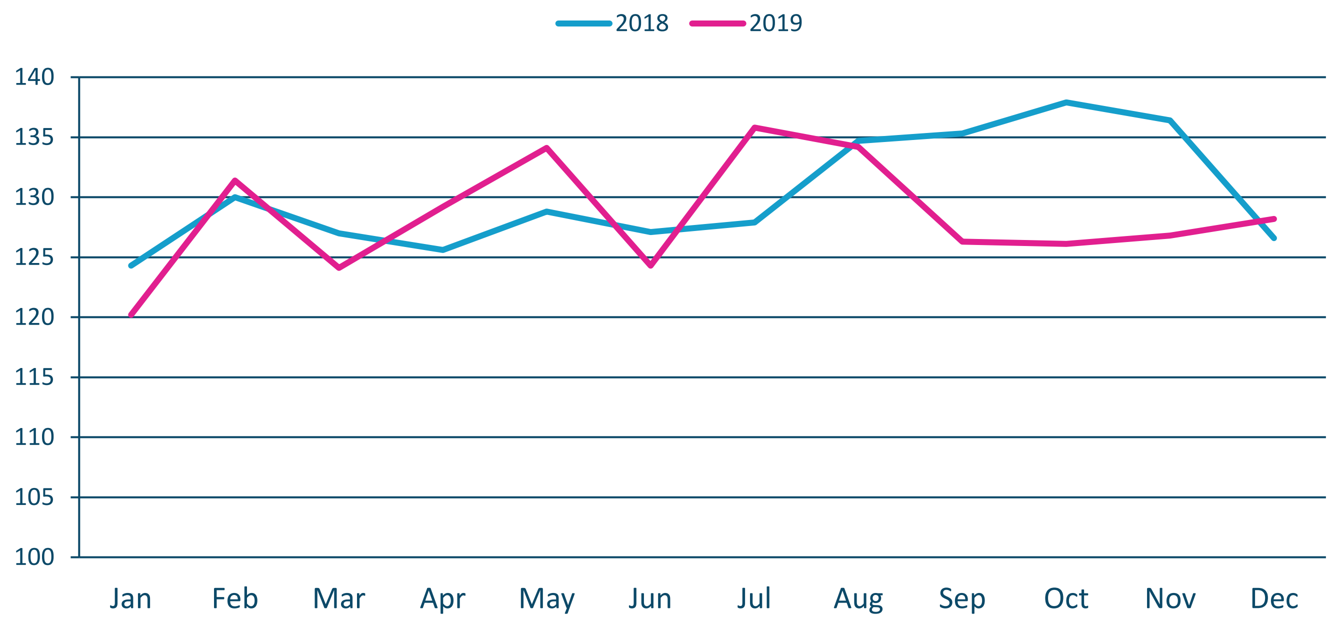
Prepared by VISIT FLORIDA

Research Department

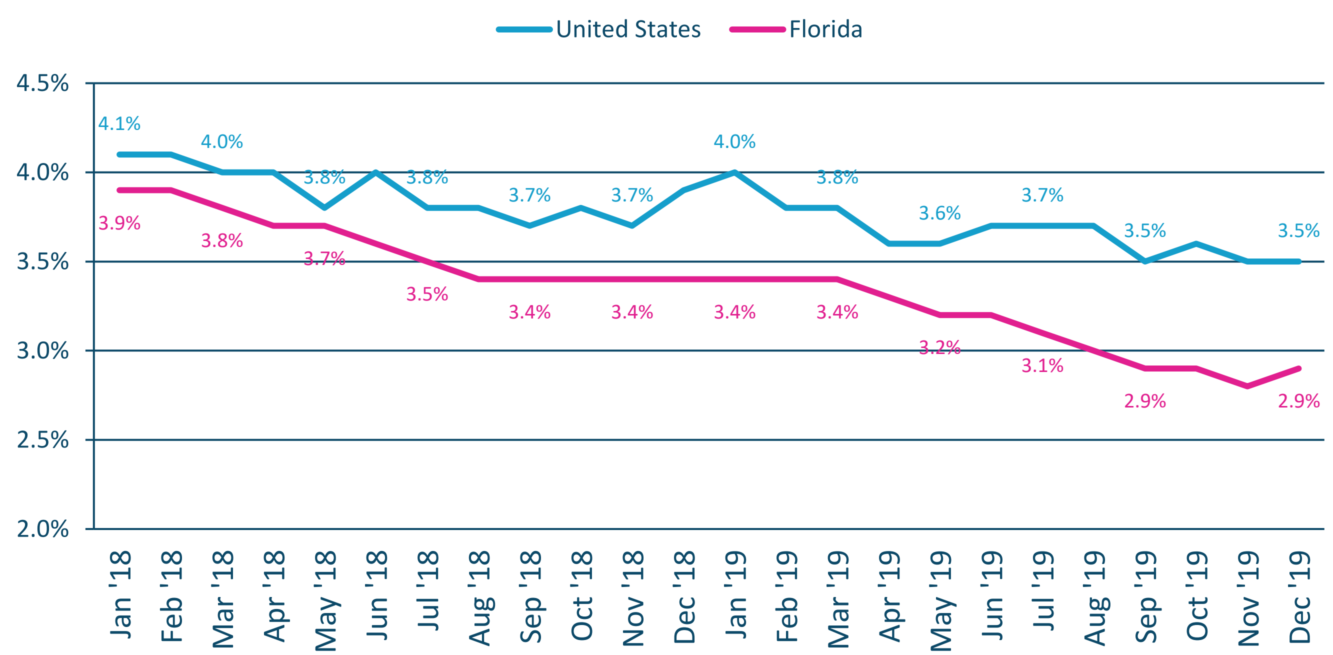
ECONOMIC DATA

U.S. Consumer Confidence

1985 = 100



Unemployment Rate



Source: Bureau of Labor Statistics

TOURIST DEVELOPMENT TAX

TAX COLLECTIONS BY COUNTY

Counties may levy a tourist development tax or "bed tax" as a percent of the total charge (county rates vary) for the lease or rental of living accommodations in any hotel, apartment hotel, motel, resort motel, apartment, apartment motel, roominghouse, recreation vehicle park, mobile home park, condominium, or timeshare for a term of six months or less. As of December 2019, 63 of Florida's 67 have instituted a bed tax.

COUNTY	TAX RATE	2018	2019	% CHANGE '19/'18
Alachua	5.0%	$5,577,169	$5,737,305	2.9%
Baker	3.0%	$52,435	$53,720	2.5%
Bay	5.0%	$26,789,836	$26,438,335	-1.3%
Bradford	4.0%	$163,470	$145,539	-11.0%
Brevard	5.0%	$15,279,275	$15,972,067	4.5%
Broward	6.0%	$86,853,783	$88,997,362	2.5%
Charlotte	5.0%	$4,143,142	$4,442,008	7.2%
Citrus	5.0%	$1,935,885	$1,892,311	-2.3%
Clay	5.0%	$1,108,796	$1,240,484	11.9%
Collier	5.0%	$28,274,989	$31,080,271	9.9%
Columbia	5.0%	$1,525,140	$1,543,540	1.2%
DeSoto	3.0%	$75,319	$74,466	-1.1%
Dixie	3.0%	$78,437	$86,968	10.9%
Duval*	6.0%	$25,684,856	$25,904,937	0.9%
Escambia	4.0%	$11,650,500	$12,529,410	7.5%
Flagler	5.0%	$2,803,677	$2,712,232	-3.3%
Franklin	2.0%	$1,324,023	$1,400,239	5.8%
Gadsden	2.0%	$139,940	$171,932	22.9%
Gilchrist	2.0%	$54,451	$61,590	13.1%
Glades	2.0%	$14,706	$19,460	32.3%
Gulf	5.0%	$2,134,328	$1,817,674	-14.8%
Hamilton	3.0%	$30,818	$39,987	29.7%
Hardee	2.0%	$43,541	$53,316	22.5%
Hendry	3.0%	$269,974	$278,222	3.1%
Hernando	5.0%	$1,020,552	$1,137,717	11.5%

Source: Florida Department of Revenue; * reported numbers include both Tourist Development Tax and Convention Development Tax collections.

TOURIST DEVELOPMENT TAX (CONTINUED)

TAX COLLECTIONS BY COUNTY (CONTINUED)

COUNTY	TAX RATE	2018	2019	% CHANGE '19/'18
Highlands	4.0%	$440,564	$995,769	126.0%
Hillsborough	6.0%	$33,569,404	$37,118,948	10.6%
Holmes	3.0%	$74,538	$101,275	35.9%
Indian River	4.0%	$3,127,044	$3,203,566	2.4%
Jackson	4.0%	$396,793	$631,036	59.0%
Jefferson	3.0%	$62,914	$58,382	-7.2%
Lake	4.0%	$3,478,223	$3,512,851	1.0%
Lee	5.0%	$41,426,244	$43,484,333	5.0%
Leon	5.0%	$6,337,296	$6,955,920	9.8%
Levy	2.0%	$233,864	$244,288	4.5%
Madison	3.0%	$129,905	$139,608	7.5%
Manatee	5.0%	$14,666,221	$16,361,666	11.6%
Marion	4.0%	$2,924,227	$3,114,548	6.5%
Martin	5.0%	$2,617,043	$2,807,987	7.3%
Miami-Dade*	6.0%	$136,798,415	$142,072,152	3.9%
Monroe*	5.0%	$43,605,640	$52,240,816	19.8%
Nassau	5.0%	$6,523,742	$7,576,441	16.1%
Okaloosa	5.0%	$21,620,600	$23,715,679	9.7%
Okeechobee	3.0%	$342,328	$355,537	3.9%
Orange	6.0%	$279,629,700	$288,032,000	3.0%
Osceola	6.0%	$58,594,929	$61,487,341	4.9%
Palm Beach	6.0%	$53,805,904	$54,758,037	1.8%
Pasco	4.0%	$2,557,510	$3,022,739	18.2%
Pinellas	6.0%	$59,104,280	$64,417,023	9.0%
Polk	5.0%	$13,942,723	$14,625,398	4.9%
Putnam	4.0%	$494,549	$634,795	28.4%
St. Johns	4.0%	$11,522,515	$12,138,895	5.3%
St. Lucie	5.0%	$4,124,614	$4,181,873	1.4%
Santa Rosa	5.0%	$3,414,392	$3,920,782	14.8%
Sarasota	5.0%	$21,862,540	$23,777,605	8.8%

Source: Florida Department of Revenue; * reported numbers include both Tourist Development Tax and Convention Development Tax collections.

TOURIST DEVELOPMENT TAX (CONTINUED)

TAX COLLECTIONS BY COUNTY (CONTINUED)

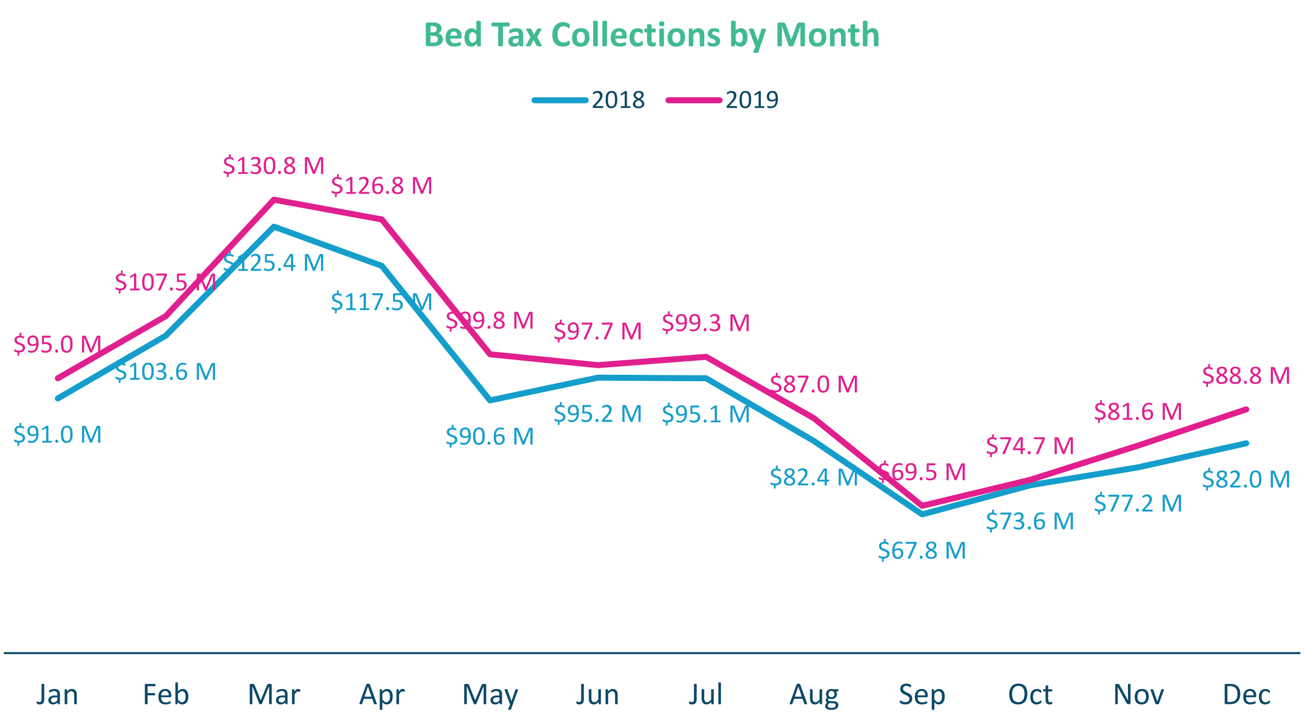
COUNTY	TAX RATE	2018	2019	% CHANGE '19/'18
Seminole	5.0%	$5,726,983	$5,954,932	4.0%
Sumter	2.0%	$755,055	$811,254	7.4%
Suwannee	3.0%	$299,132	$277,168	-7.3%
Taylor	5.0%	$524,967	$570,062	8.6%
Volusia*	6.0%	$23,197,159	$23,652,510	2.0%
Wakulla	4.0%	$178,867	$205,837	15.1%
Walton	4.0%	$26,213,090	$27,429,025	4.6%
Washington	3.0%	$107,115	$166,233	55.2%
Total		**$1,101,460,071**	**$1,158,585,403**	**5.2%**

Source: Florida Department of Revenue; * reported numbers include both Tourist Development Tax and Convention Development Tax collections.

TOURIST DEVELOPMENT TAX (CONTINUED)

COLLECTIONS BY MONTH

MONTH	2018	2019	% CHANGE '19/'18
January	$90,995,865	$95,048,565	4.5%
February	$103,590,536	$107,485,964	3.8%
March	$125,398,144	$130,798,162	4.3%
April	$117,540,725	$126,814,366	7.9%
May	$90,628,756	$99,834,662	10.2%
June	$95,162,932	$97,666,867	2.6%
July	$95,059,320	$99,333,955	4.5%
August	$82,448,095	$87,041,799	5.6%
September	$67,778,918	$69,495,489	2.5%
October	$73,630,123	$74,711,179	1.5%
November	$77,212,832	$81,567,169	5.6%
December	$82,013,825	$88,787,226	8.3%
Total	**$1,101,460,071**	**$1,158,585,403**	**5.2%**

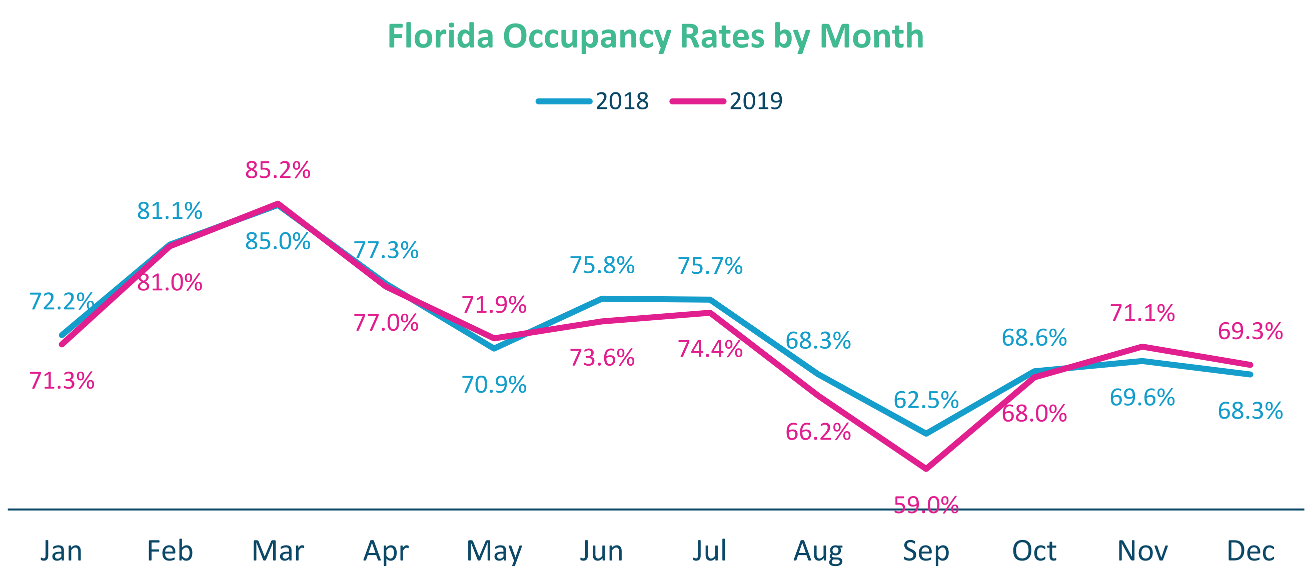


Note: Reported numbers include both Tourist Development Tax and Convention Development Tax collections.
Source: Florida Department of Revenue

HOTEL/MOTEL PERFORMANCE

OCCUPANCY RATES

MARKET	2018	2019	% CHANGE '19/'18
United States	**66.1%**	**66.1%**	**0.0%**
State of Florida	**72.9%**	**72.3%**	**-0.8%**
Daytona Beach	63.1%	62.3%	-1.2%
Florida Central	64.6%	64.1%	-0.7%
Florida Keys	76.7%	76.6%	-0.1%
Florida Panhandle	65.6%	66.0%	0.6%
Fort Lauderdale	76.7%	76.0%	-1.0%
Fort Myers	69.0%	68.5%	-0.6%
Jacksonville	72.2%	71.3%	-1.1%
Melbourne-Titusville	68.7%	69.3%	0.9%
Miami-Hialeah	76.6%	75.9%	-0.9%
Naples	65.4%	64.6%	-1.3%
Orlando	77.7%	76.1%	-2.1%
Sarasota-Bradenton	65.0%	65.4%	0.6%
Tampa-St. Petersburg	71.3%	72.3%	1.3%
West Palm Beach-Boca Raton	72.8%	72.0%	-1.1%

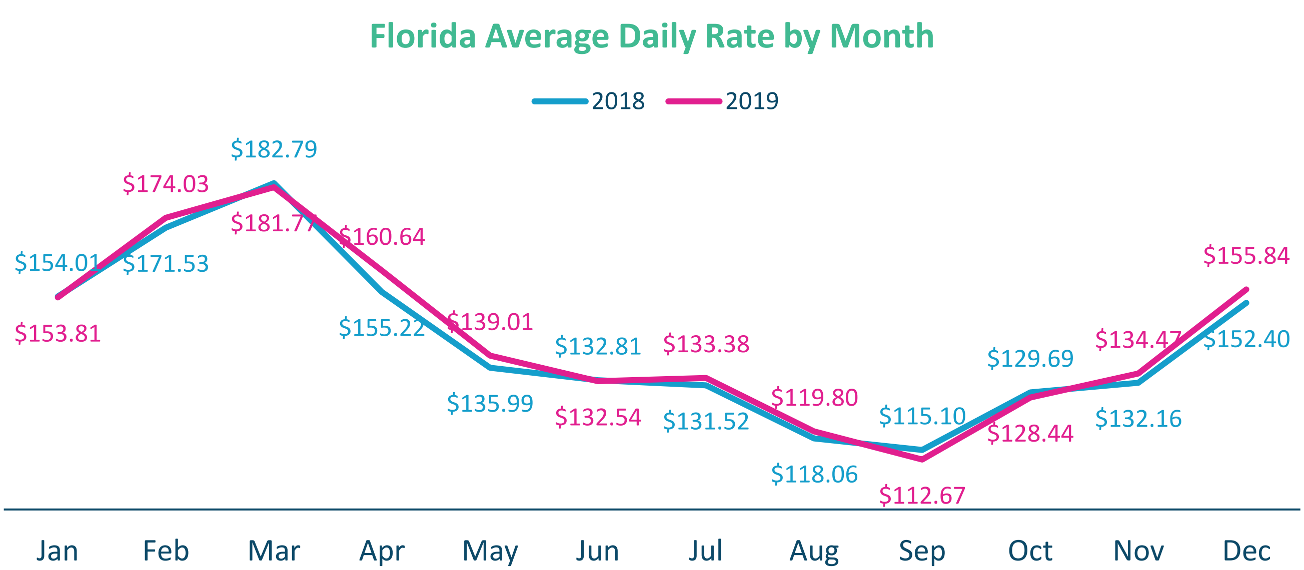


Source: STR

HOTEL/MOTEL PERFORMANCE (CONTINUED)

AVERAGE DAILY RATES

MARKET	2018	2019	% CHANGE '19/'18
United States	**$129.97**	**$131.21**	**1.0%**
State of Florida	**$143.64**	**$145.21**	**1.1%**
Daytona Beach	$118.77	$119.03	0.2%
Florida Central	$130.26	$131.70	1.1%
Florida Keys	$266.93	$277.32	3.9%
Florida Panhandle	$126.08	$132.34	5.0%
Fort Lauderdale	$149.10	$146.83	-1.5%
Fort Myers	$155.74	$157.24	1.0%
Jacksonville	$114.99	$116.93	1.7%
Melbourne-Titusville	$116.30	$118.06	1.5%
Miami-Hialeah	$198.86	$196.52	-1.2%
Naples	$234.85	$241.99	3.0%
Orlando	$125.59	$126.95	1.1%
Sarasota-Bradenton	$144.40	$139.28	-3.5%
Tampa-St. Petersburg	$130.11	$132.27	1.7%
West Palm Beach-Boca Raton	$182.86	$185.24	1.3%



Source: STR

HOTEL/MOTEL INVENTORY

BY COUNTY AS OF JULY 1, 2019

COUNTY	PROPERTIES	ROOMS
Alachua	61	5,320
Baker	3	146
Bay	111	7,066
Bradford	10	358
Brevard	111	9,644
Broward	400	33,639
Calhoun	2	24
Charlotte	28	1,705
Citrus	24	1,200
Clay	12	1,090
Collier	79	7,516
Columbia	28	1,745
DeSoto	4	150
Dixie	9	146
Duval	166	18,035
Escambia	84	7,386
Flagler	17	936
Franklin	11	369
Gadsden	15	479
Gilchrist	2	52
Glades	8	99
Gulf	3	102
Hamilton	6	161
Hardee	4	112
Hendry	13	423
Hernando	17	978
Highlands	21	1,266
Hillsborough	213	22,942
Holmes	5	243

COUNTY	PROPERTIES	ROOMS
Indian River	37	1,969
Jackson	17	869
Jefferson	5	179
Lafayette	2	27
Lake	48	2,715
Lee	181	11,689
Leon	63	5,839
Levy	18	332
Liberty	1	12
Madison	4	196
Manatee	71	4,064
Marion	74	4,101
Martin	21	1,401
Miami-Dade	553	59,258
Monroe	190	9,269
Nassau	25	1,959
Okaloosa	69	5,933
Okeechobee	15	591
Orange	308	93,792
Osceola	125	24,747
Palm Beach	185	18,094
Pasco	45	2,975
Pinellas	328	21,456
Polk	120	7,920
Putnam	21	664
Santa Rosa	13	952
Sarasota	89	6,057
Seminole	44	4,645
St. Johns	87	5,891

Source: Florida Department of Business and Professional Regulation, Master File Statistics

HOTEL/MOTEL INVENTORY (CONTINUED)

BY COUNTY AS OF JULY 1, 2019 (CONTINUED)

COUNTY	PROPERTIES	ROOMS
St. Lucie	44	3,191
Sumter	12	760
Suwannee	11	344
Taylor	18	535
Union	0	0
Volusia	221	12,129
Wakulla	6	200
Walton	24	2,091
Washington	7	261
Total State	**4,569**	**440,439**

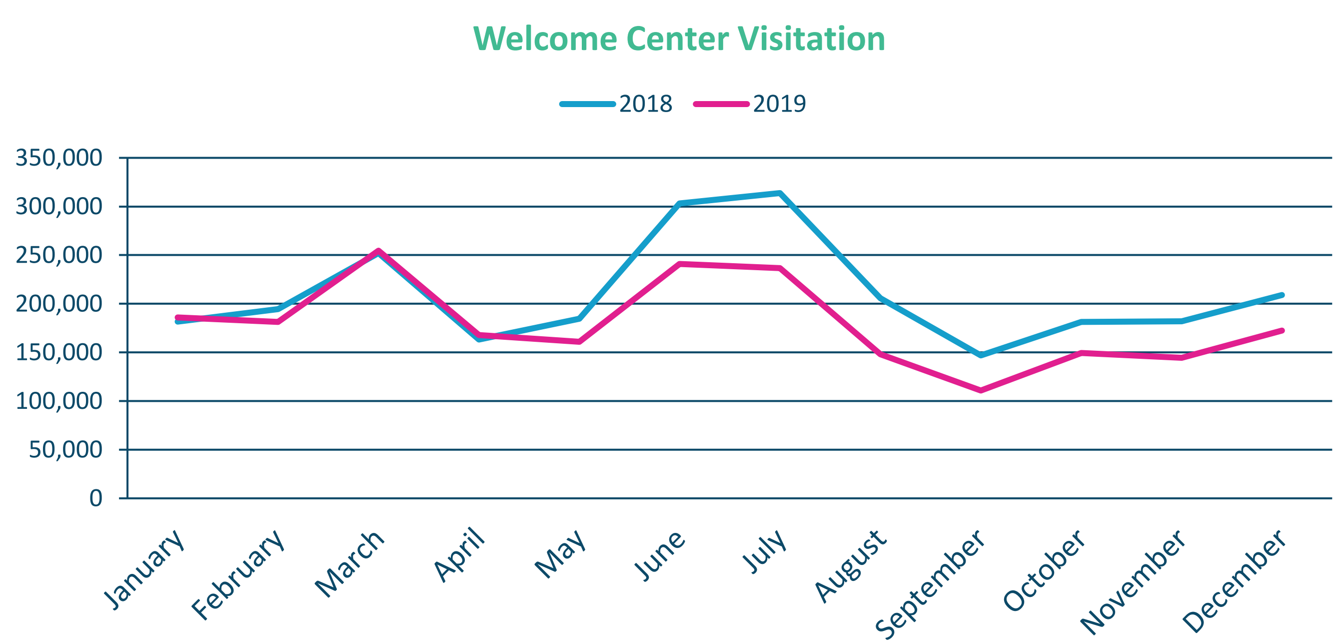
Source: Florida Department of Business and Professional Regulation, Master File Statistics

WELCOME CENTER VISITATION

ALL WELCOME CENTERS COMBINED

MONTH	2018	2019	% CHANGE '19/'18	% OF TOTAL (2019)
January	181,770	185,885	2.3%	8.6%
February	194,494	181,273	-6.8%	8.4%
March	252,207	254,573	0.9%	11.8%
April	163,099	167,902	2.9%	7.8%
May	184,659	160,829	-12.9%	7.5%
June	303,255	240,956	-20.5%	11.2%
July	313,784	236,636	-24.6%	11.0%
August	205,667	148,192	-27.9%	6.9%
September	146,909	110,801	-24.6%	5.1%
October	181,302	149,315	-17.6%	6.9%
November	182,120	144,622	-20.6%	6.7%
December	209,125	172,567	-17.5%	8.0%
Total	**2,676,145**	**2,153,551**	**-19.5%**	**100%**

Note: VISIT FLORIDA ceased operating the U.S. 231 Welcome Center in June 2019. Data for U.S. 231 visitors not available for July-December 2019.



Source: Florida Department of Revenue

The Official Tourism Marketing Corporation for the State of Florida

101 N. Monroe Street, 9th Floor

Tallahassee, FL 32301