2021 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 2023, the Florida welcomed an all-time high of 140.6 million visitors to the state, representing a 2.3 percent increase from the previous year.

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 2021 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, XBorder 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

TABLE OF CONTENTS

Summary of Florida Tourism 1

VISITOR ESTIMATES

Summary of Visitors to Florida 4
2021 Visitor Estimates 5
Visitor Share by Transportation 6
Visitors by Quarter 7
Enplanements 8
Visitor Estimates Methodology 9

PROFILE OF DOMESTIC VISITORS TO FLORIDA

Summary of Domestic Visitors 12
Primary Purpose of Trip 14
Transportation Type 14
Seasonality 14
Travel Party Composition 15
Florida Destination Regions 15
Florida Destination Region Map 16
Top Origin States 17
Top Origin Designated Market Areas 17
Activities During Trip 18
Average Expenditures 19
Paid vs. Non-Paid Accommodations 20
Accommodation Type 20
Hotel Level 20
Length of Stay 21
Accommodation Reservation Type 21
Trip Planning Timeframe 22
Trip Planning Resources Used 22
Age of Adult Travelers 23
Household Income 23
Generation 24
Lifestage 24

PROFILE OF DOMESTIC VISITORS TO FLORIDA TRAVELING BY AIR

Summary of Domestic Visitors to Florida Traveling by Air 26
Primary Purpose of Trip 28
Seasonality 28
Length of Stay 28
Travel Party Composition 29
Florida Destination Regions 29
Florida Destination Region Map 30
Top Origin States 31
Top Origin Designated Market Areas 31

Activities During Trip 32
Average Expenditures 33
Paid vs. Non-Paid Accommodations 34
Accommodation Type 34
Hotel Level 34
Method of Making Air Travel Reservation 35
Accommodation Reservation Type 35
Trip Planning Timeframe 36
Trip Planning Resources Used 36
Age of Adult Travelers 37
Household Income 37
Generation 38
Lifestage 38

PROFILE OF DOMESTIC VISITORS TO FLORIDA TRAVELING BY AUTO

Summary of Domestic Visitors to Florida Traveling by Air 40
Primary Purpose of Trip 42
Seasonality 42
Travel Party Composition 43
Florida Destination Regions 43
Florida Destination Region Map 44
Top Origin States 45
Top Origin Designated Market Areas 45
Activities During Trip 46
Average Expenditures 47
Paid vs. Non-Paid Accommodations 48
Accommodation Type 48
Hotel Level 48
Length of Stay 49
Accommodation Reservation Type 49
Trip Planning Timeframe 50
Trip Planning Resources Used 50
Age of Adult Travelers 51
Household Income 51
Generation 52
Lifestage 52

PROFILE OF DOMESTIC LEISURE VISITORS TO FLORIDA

Summary of Domestic Leisure Visitors to Florida 54
Primary Purpose of Trip 56
Transportation Type 56
Seasonality 56
Travel Party Composition 57
Florida Destination Regions 57
Florida Destination Region Map 58
Top Origin States 59
Top Origin Designated Market Areas 59
Activities During Trip 60
Average Expenditures 61
Paid vs. Non-Paid Accommodations 62
Accommodation Type 62

Hotel Level 62
Length of Stay 63
Accommodation Reservation Type 63
Trip Planning Timeframe 64
Trip Planning Resources Used 64
Age of Adult Travelers 65
Household Income 65
Generation 66
Lifestage 66

PROFILE OF DOMESTIC BUSINESS VISITORS TO FLORIDA

Summary of Domestic Business Visitors to Florida 68
Primary Purpose of Trip 70
Transportation Type 70
Seasonality 70
Travel Party Composition 71
Florida Destination Regions 71
Florida Destination Region Map 72
Top Origin States 73
Top Origin Designated Market Areas 73
Activities During Trip 74
Average Expenditures 75
Paid vs. Non-Paid Accommodations 76
Accommodation Type 76
Hotel Level 76
Length of Stay 77
Accommodation Reservation Type 77
Trip Planning Timeframe 78
Trip Planning Resources Used 78
Age of Adult Travelers 79
Household Income 79
Generation 80
Lifestage 80

PROFILE OF DOMESTIC VISITORS TO FLORIDA BY VACATION REGION

Summary of Domestic Visitors to Florida by Vacation Region 82
Map of Vacation Regions with Visitation Share 85
Regional Share of Domestic Visitors 86
Profile of Domestic Visitors to Central Florida 87
- Primary Purpose of Trip 87
- Transportation Type 87
- Seasonality 87
- Travel Party Composition 87
- Top Origin States 88
- Top Origin Designated Market Areas 88
- Activities During Trip 88
- Length of Stay 88
- Paid vs. Non-Paid Accommodations 89
- Hotel Level 89
- Accommodation Reservation Type 89
- Trip Planning Timeframe 90

Trip Planning Resources Used 90
Average Expenditures 90
Age of Adult Travelers 91
Household Income 91
Generation 91
Profile of Domestic Visitors to Central East Florida 92
Primary Purpose of Trip 92
Transportation Type 92
Seasonality 92
Travel Party Composition 92
Top Origin States 93
Top Origin Designated Market Areas 93
Activities During Trip 93
Length of Stay 93
Paid vs. Non-Paid Accommodations 94
Hotel Level 94
Accommodation Reservation Type 94
Trip Planning Timeframe 95
Trip Planning Resources Used 95
Average Expenditures 95
Age of Adult Travelers 96
Household Income 96
Generation 96
Profile of Domestic Visitors to Central West Florida 97
Primary Purpose of Trip 97
Transportation Type 97
Seasonality 97
Travel Party Composition 97
Top Origin States 98
Top Origin Designated Market Areas 98
Activities During Trip 98
Length of Stay 98
Paid vs. Non-Paid Accommodations 99
Hotel Level 99
Accommodation Reservation Type 99
Trip Planning Timeframe 100
Trip Planning Resources Used 100
Average Expenditures 100
Age of Adult Travelers 101
Household Income 101
Generation 101
Profile of Domestic Visitors to North Central Florida 102
Primary Purpose of Trip 102
Transportation Type 102
Seasonality 102
Travel Party Composition 102
Top Origin States 103
Top Origin Designated Market Areas 103
Activities During Trip 103
Length of Stay 103
Paid vs. Non-Paid Accommodations 104
Hotel Level 104

Accommodation Reservation Type ... 104
Trip Planning Timeframe ... 105
Trip Planning Resources Used ... 105
Average Expenditures ... 105
Age of Adult Travelers ... 106
Household Income ... 106
Generation ... 106
Profile of Domestic Visitors to Northeast Florida ... 107
Primary Purpose of Trip ... 107
Transportation Type ... 107
Seasonality ... 107
Travel Party Composition ... 107
Top Origin States ... 108
Top Origin Designated Market Areas ... 108
Activities During Trip ... 108
Length of Stay ... 108
Paid vs. Non-Paid Accommodations ... 109
Hotel Level ... 109
Accommodation Reservation Type ... 109
Trip Planning Timeframe ... 110
Trip Planning Resources Used ... 110
Average Expenditures ... 110
Age of Adult Travelers ... 111
Household Income ... 111
Generation ... 111
Profile of Domestic Visitors to Northwest Florida ... 112
Primary Purpose of Trip ... 112
Transportation Type ... 112
Seasonality ... 112
Travel Party Composition ... 112
Top Origin States ... 113
Top Origin Designated Market Areas ... 113
Activities During Trip ... 113
Length of Stay ... 113
Paid vs. Non-Paid Accommodations ... 114
Hotel Level ... 114
Accommodation Reservation Type ... 114
Trip Planning Timeframe ... 115
Trip Planning Resources Used ... 115
Average Expenditures ... 115
Age of Adult Travelers ... 116
Household Income ... 116
Generation ... 116
Profile of Domestic Visitors to Southeast Florida ... 117
Primary Purpose of Trip ... 117
Transportation Type ... 117
Seasonality ... 117
Travel Party Composition ... 117
Top Origin States ... 118
Top Origin Designated Market Areas ... 118
Activities During Trip ... 118
Length of Stay ... 118

Paid vs. Non-Paid Accommodations 119
Hotel Level 119
Accommodation Reservation Type 119
Trip Planning Timeframe 120
Trip Planning Resources Used 120
Average Expenditures 120
Age of Adult Travelers 121
Household Income 121
Generation 121
Profile of Domestic Visitors to Southwest Florida 122
Primary Purpose of Trip 122
Transportation Type 122
Seasonality 122
Travel Party Composition 122
Top Origin States 123
Top Origin Designated Market Areas 123
Activities During Trip 123
Length of Stay 123
Paid vs. Non-Paid Accommodations 124
Hotel Level 124
Accommodation Reservation Type 124
Trip Planning Timeframe 125
Trip Planning Resources Used 125
Average Expenditures 125
Age of Adult Travelers 126
Household Income 126
Generation 126
Regional Comparison 127

PROFILE OF IN-STATE VISITORS

Summary of In-State Visitors 132
Primary Purpose of Trip 134
Transportation Type 134
Seasonality 134
Travel Party Composition 135
Florida Destination Regions 135
Florida Destination Region Map 136
Top Origin States 137
Top Origin Designated Market Areas 137
Activities During Trip 138
Average Expenditures 139
Paid vs. Non-Paid Accommodations 140
Accommodation Type 140
Hotel Level 140
Length of Stay 141
Accommodation Reservation Type 141
Trip Planning Timeframe 142
Trip Planning Resources Used 142
Age of Adult Travelers 143
Household Income 143
Generation 144
Lifestage 144

PROFILE OF INTERNATIONAL VISITORS TO FLORIDA

Top International Origin Markets – 2019 vs 2021 ... 146
Top International Origin Markets – 2020 vs 2021 ... 147
Summary of Overseas Visitors to Florida ... 148
Profile of Overseas Visitors to Florida ... 150
- Primary Purpose of Trip ... 150
- Travel Party Size ... 150
- Travel Party Composition ... 150
- Expenditures in U.S. ... 150
- Advance Decision to Travel ... 151
- Trip Planning Sources ... 151
- Transportation Used While in U.S. ... 151
- Advance Air Travel Reservations ... 152
- Air Travel Reservation Method ... 152
- Top Reason for Selecting Airline ... 152
- Length of Stay ... 152
- Accommodations ... 153
- Lodging Reservations ... 153
- Florida Destinations Visited ... 153
- Activities During Trip ... 154
- Seasonality ... 154
- Age of Adult Travelers ... 154
- Household Income ... 154

Summary of Canadian Visitors to Florida ... 155
Profile of Canadian Visitors to Florida ... 157
- Primary Purpose of Trip ... 157
- Travel Party Size ... 157
- Travel Party Composition ... 157
- Advance Decision to Travel ... 158
- Trip Planning Sources ... 158
- Booking/Purchase Method ... 158
- Transportation Used to Return to Canada ... 159
- Transportation Used While in U.S. ... 159
- Activities During Trip ... 159
- Accommodations ... 160
- Length of Stay ... 160
- Expenditures in Florida ... 160
- Seasonality ... 160
- Age of Adult Travelers ... 161
- Employment Status ... 161
- Province of Residence ... 161

Data Methodology for International Visitors ... 162

TOURISM INDICATORS

Economic Data ... 164
Tourist Development Tax Collections by County ... 165
Tourist Development Tax Collections by Month ... 168
Hotel/Motel Performance ... 169
Hotel/Motel Inventory ... 171
Welcome Center Visitation ... 173

SUMMARY OF FLORIDA TOURISM

Summary:

> Florida was on the leading edge of the pandemic recovery in 2021, outpacing its peers nationally and globally in the recovery of its tourism industry. Annual visitation rose +53.5% from 2020 to reach 121.8 million, a number that was only -7.0% lower than it had been in 2019. Visitation exceeded 2019 levels in the second half of the year.

> Air travel began to rebound in 2021, propelled by strong domestic air visitation. The share of visitors traveling by air climbed from 30.5% in 2020 to 35.9%, though it still fell short of the 40.9% share estimated in 2019. Canadians were more likely to travel by air (73.6%) than they had been before the pandemic (70.0%), likely due to the closure of the land border that was only rescinded late in the year.

> Accounting for 96.3% of total visitors, domestic visitation played a vital role in driving the recovery of the Florida tourism industry in 2021. Domestic visitation added up to 117.3 million, up +55.4% from 2020 and slightly higher (+0.1%) than in 2019. Overseas visitation climbed +68.6% from the previous year to 4.1 million, but remained -58.6% lower than in 2019. Canadian visitation fell even lower than it had in 2020; it dropped -69.4% to 454,400.

> Total passenger enplanements at the 19 commercial airports in Florida rose +80.6% year-over-year to 81.4 million in 2021, a rapid recovery attributable to a strong domestic travel market that favored Florida's openness and accessibility. However, enplanements were still down by -17.5% compared to 2019.

> Leisure visitors accounted for 87% of domestic visitors in 2021, down 5 percentage points from 2019 and 2020. The decline reflected a resurgence in business travel that was largely attributable to a tripling in the share of transient business visitors from 2% to 6%.

> The seasonality of domestic travel in 2021 resembled what it had been before the pandemic. The busiest seasons were Summer (31%) and Spring (24%), while Winter saw a decline in share from the previous year, falling from 53% to 23%.

> Georgia overtook New York to become the top origin state for domestic visitors, claiming a 9.5% share of visitors compared to the Empire State's 9.3%. Rounding out the top 5 were Alabama (6.4%), Texas (6.3%), and Ohio (5.2%).

> The top activity for leisure visitors in 2021 was visiting the beach/waterfront, though its participation rate declined to 35% from 37% in 2020. Engagement also declined for a number of other popular activities, including shopping (22%), culinary/dining experiences (21%), and visiting friends/relatives (19%).

> Domestic visitors skewed significantly younger in 2021; the average age fell to 47.9 years from 55.1 in 2020 and 49.3 in 2019. This reflected a surge in Millennial and Gen Z travelers, who had been more hesitant to return to travel early in the pandemic; the two generational cohorts accounted for a historic high of 39% of visitors.

> Average expenditures grew at a historic pace in 2021, as domestic visitors spent an average of +35% more per person per day than they had in 2020 - vastly outstripping the rate of inflation. Wage growth, high asset values, and pandemic savings gave consumers the opportunity to increase their spending on travel at this notable rate.

> International visitation had a few bright spots, most notably Colombia (709,000) and Peru (261,000). Historically regarded as secondary markets, both countries sent more visitors to Florida than they had prior to the pandemic in 2019, helping to offset severe losses caused by travel restrictions on visitors from Brazil (132,000), Canada (454,000), and Europe (529,000). Canada, historically Florida's largest international market, fell to second place behind Colombia. America's southern neighbor, Mexico (389,000), climbed from fifth in 2020 to third in 2021.

> Strong domestic visitation combined with unprecedented growth in visitor spending helped lift tourist tax collections to new heights in 2021. Total collections rose +71.6% from 2020 to reach $1.3 billion - exceeding 2019 collections by +11.0%. Orange County led the state in tax collections with $223.6 million, nearly double the amount generated in 2020 (+92.8%). Miami-Dade ($109.0 million), Broward ($100.0 million), Monroe ($95.1 million), and Pinellas ($80.3 million) had the highest collections after Orange. Polk County enjoyed the largest relative increase in tax collections, which rose +292.3% from the previous year. Baker (+181.2%) and Monroe (+133.6%) also boasted strong growth.

> In 2021, Florida hotels recovered much of the ground they had lost in 2020. Rooms sold rebounded by +49% to 110.6 million, and were down by only -6% compared to pre-pandemic 2019. Occupancy rose to 64%, up from 48% in 2020, outpacing the rate of recovery nationwide. ADR grew by +20% to $158.36, and even exceeded the ADR recorded in 2019 by +9%. As a consequence of strong ADR growth, Florida hotels generated more revenue in 2021 than they had in 2019 (+1.8%), despite selling fewer rooms. Florida notably outperformed its peers nationwide, as hotels across the U.S. sold -10% fewer rooms and produced -15% less in room revenue than in 2019.

ESTIMATES OF VISITORS TO FLORIDA

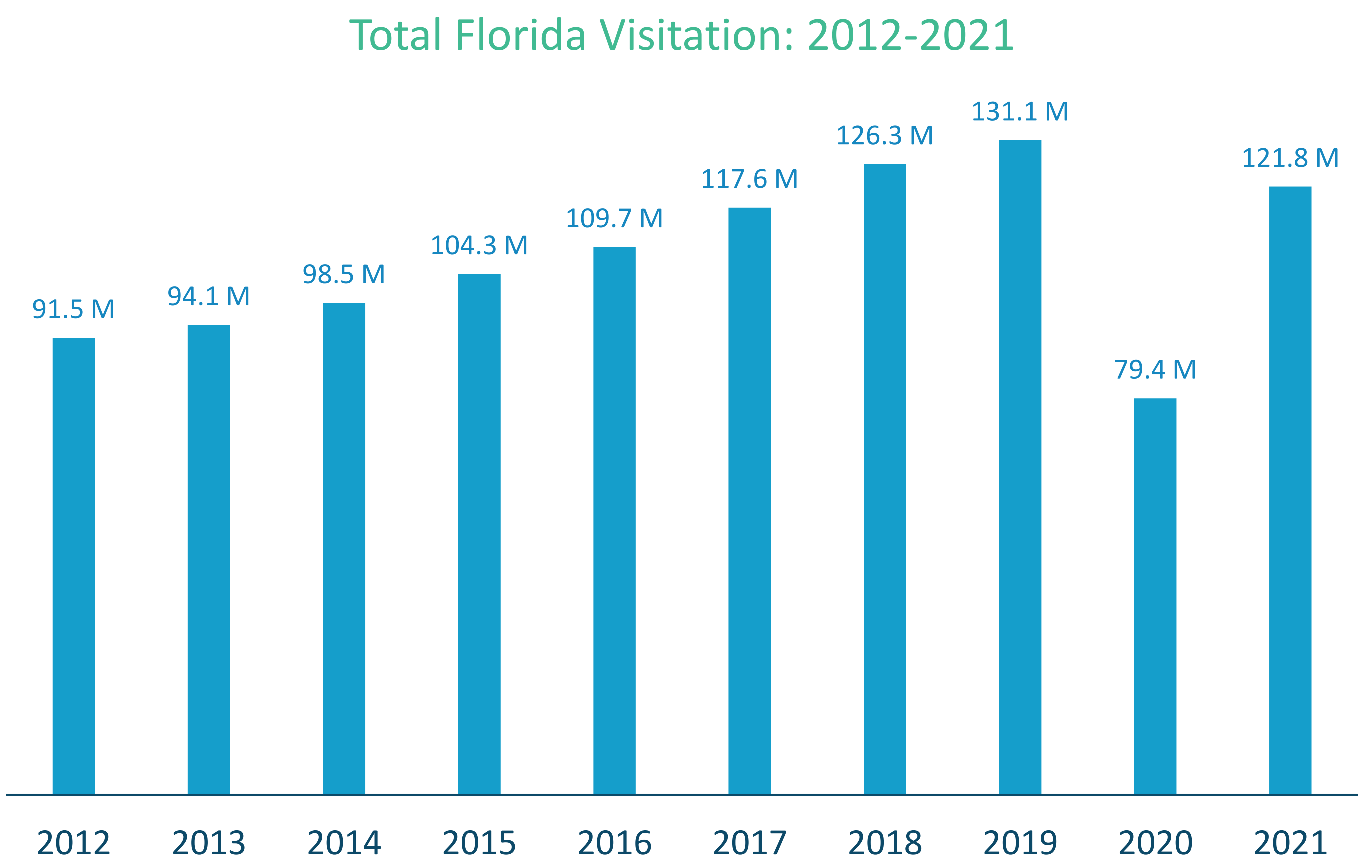
Prepared by VISIT FLORIDA Research Department

SUMMARY OF VISITORS TO FLORIDA

Visitation to Florida showed strong signs of recovery in 2021, climbing 53.5% to 121.8 million after having dropped to 79.4 million the previous year due to the coronavirus pandemic. Domestic visitation drove the recovery, surpassing pre-pandemic 2019 levels in the last 3 quarters of the year and reaching an annual record total of 117.3 million (+0.1%). Travel restrictions and border closures prevented international visitation from recovering at the same pace. Overseas vistation rose 68.6% from 2020 to 4.1 million, but remained -58.6% lower than it had been in 2019. Canadian visitation was barely a tenth of what it had been pre-pandemic at 454,000 (-88.9%).

Air travel showed signs of recovery, with 35.9% of Florida visitors taking to the air to reach the Sunshine State, up from 30.5% in 2020. Border closures added to the challenges faced by Canadian travelers, contributing to the increase in air visitation.

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.



Sources: TravelTrak America; D.K. Shifflet; Statistics Canada; XBorder 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 2021
FINAL
in person-trips

		DOMESTIC	OVERSEAS	CANADA	TOTAL	% OF TOTAL
Q1	Air	8.042 M	492 K	31 K	8.565 M	33.3%
	Non-Air	17.165 M		14 K	17.179 M	66.7%
	Total	**25.207 M**	**492 K**	**46 K**	**25.744 M**	
	% Change '21/'20	-7.5%	-72.0%	-96.7%	-15.2%	
Q2	Air	11.167 M	1.035 M	14 K	12.216 M	38.3%
	Non-Air	19.682 M		20 K	19.702 M	61.7%
	Total	**30.849 M**	**1.035 M**	**34 K**	**31.918 M**	
	% Change '21/'20	218.9%	4099.0%	825.4%	229.0%	
Q3	Air	9.484 M	1.041 M	71 K	10.597 M	32.3%
	Non-Air	22.223 M		28 K	22.251 M	67.7%
	Total	**31.707 M**	**1.041 M**	**99 K**	**32.848 M**	
	% Change '21/'20	57.8%	729.5%	338.9%	62.3%	
Q4	Air	10.709 M	1.491 M	218 K	12.418 M	39.6%
	Non-Air	18.853 M		57 K	18.910 M	60.4%
	Total	**29.562 M**	**1.491 M**	**275 K**	**31.328 M**	
	% Change '21/'20	59.9%	197.7%	216.8%	64.2%	
CY 2021	Air	39.403 M	4.058 M	334 K	43.796 M	35.9%
	Non-Air	77.922 M		120 K	78.042 M	64.1%
	Total	**117.325 M**	**4.058 M**	**454 K**	**121.838 M**	
	% Change '21/'20	55.4%	68.6%	-69.4%	53.5%	

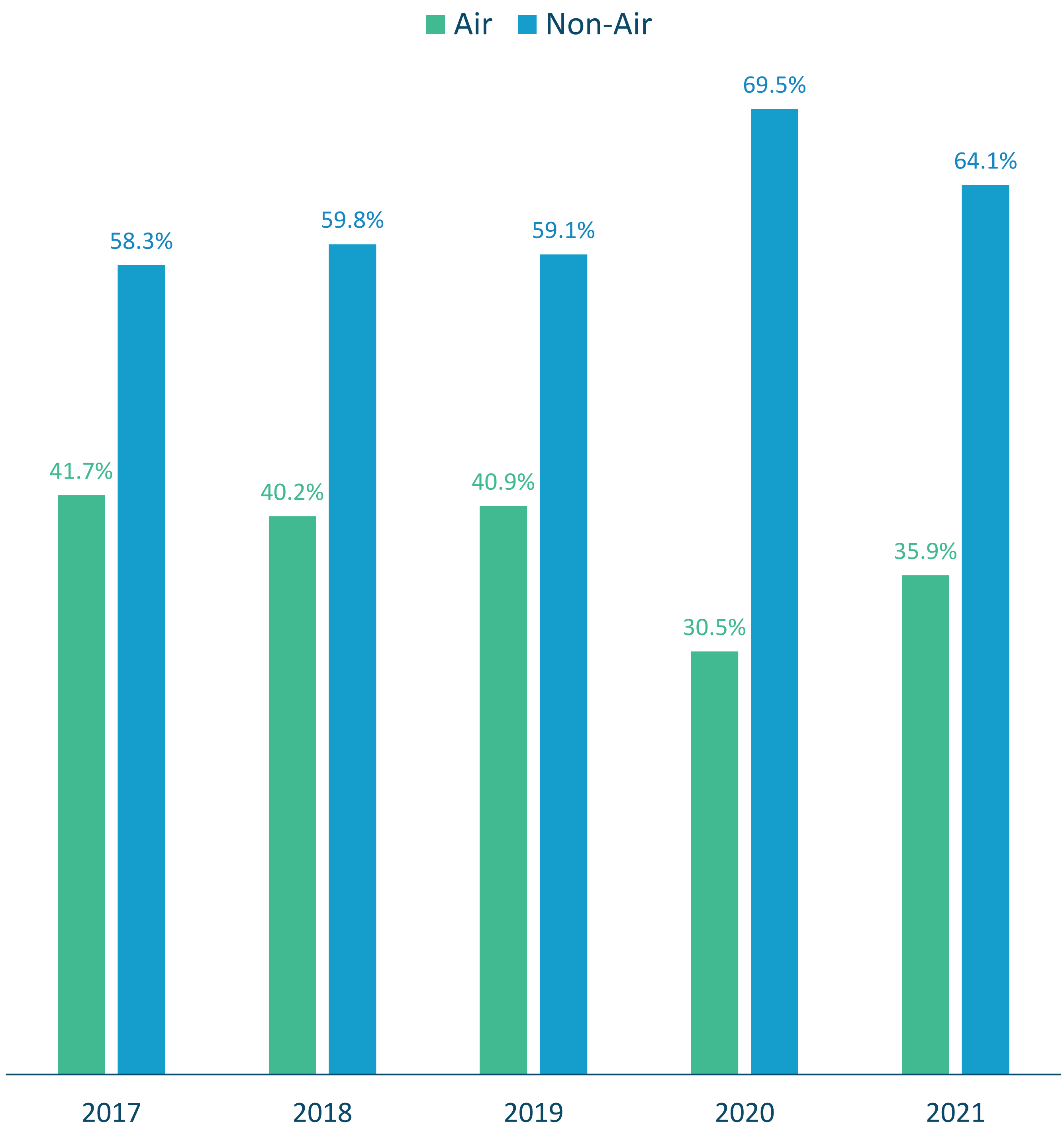
Note: Figures have been rounded to the nearest thousand and may not sum to the total as a result. Figures shown in the table revised November 15, 2022.

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

VISIT FLORIDA

VISITOR SHARE BY TRANSPORTATION

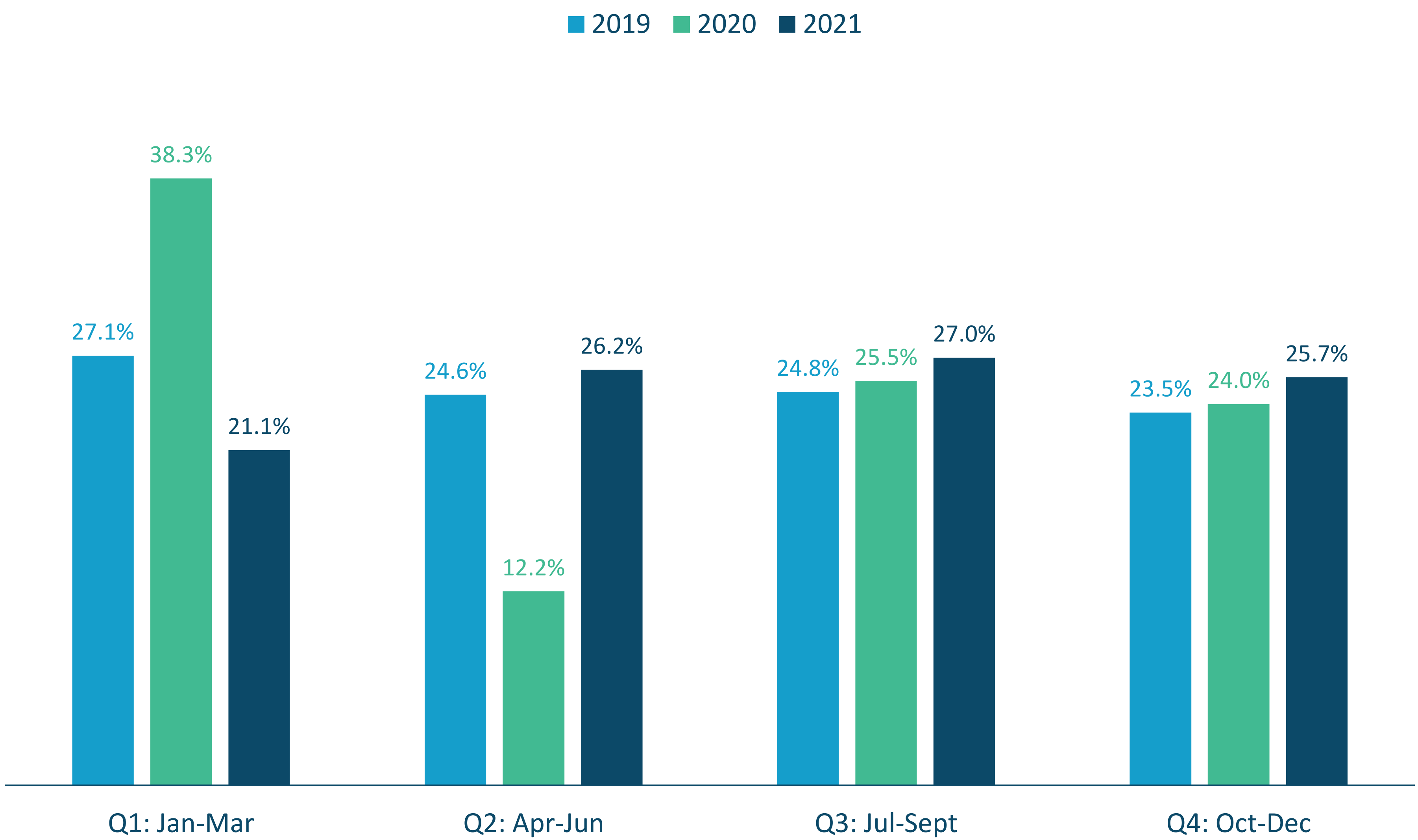
ANNUAL RATIO OF AIR AND NON-AIR VISITORS



Sources: TravelTrak America; D.K. Shifflet; Statistics Canada; XBorder 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 2019-2021



Sources: TravelTrak America; D.K. Shifflet; Statistics Canada; XBorder 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

Enplanements rebounded in 2021 after a steep decline due to the onset of the coronavirus pandemic in 2020. Total enplanements at 19 Florida airports rose by 80.6% to 81,447,893, but remained below 2019 by 17.5%. Small and mid-sized airports along Florida's Panhandle and West Coast recovered more quickly than large metro airports, reflecting travelers' preferences for smaller and less urban destinations. The fastest rebound was seen in Sarasota, where enplanements in 2021 exceeded 2019 by 61.6%, followed by Key West were they were up by 52.4%. Destin-Fort Walton, Fort Myers, Pensacola, and St. Petersburg-Clearwater also surpassed their performance in 2019.

Airports that saw some of the steepest drops in 2020 enjoyed notable rebounds in 2021. Enplanements at Miami nearly doubled to reach 18.6 million, though this was still down by 18.2% from 2019. Enplanements were up 84.8% year-over-year at Orlando International but still 20.4% below the number observed in 2019.

AIRPORT	2020	2021	% CHANGE '21/'20
Daytona	166,622	289,361	73.7%
Destin-Fort Walton Beach	473,579	1,001,032	111.4%
Fort Lauderdale	8,682,042	13,970,682	60.9%
Fort Myers	3,004,387	5,188,170	72.7%
Gainesville	127,776	204,856	60.3%
Jacksonville	1,427,318	2,521,209	76.6%
Key West	323,107	741,100	129.4%
Melbourne	109,836	176,701	60.9%
Miami	9,370,645	18,637,528	98.9%
Orlando International	10,858,944	20,068,088	84.8%
Orlando Sanford	769,598	1,189,799	54.6%
Palm Beach	1,541,996	2,627,918	70.4%
Panama City	409,272	766,128	87.2%
Pensacola	593,448	1,163,267	96.0%
Punta Gorda	596,715	783,598	31.3%
Sarasota	616,798	1,582,917	156.6%
St. Petersburg-Clearwater	697,638	1,174,844	68.4%
Tallahassee	189,033	330,091	74.6%
Tampa	5,138,990	9,030,604	75.7%
Total	**45,097,744**	**81,447,893**	**80.6%**

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:

> Florida's domestic visitors were more likely to be traveling to the Sunshine State for business in 2021 than the previous year, though leisure remained the most common purpose of travel (87%). The share of business travelers nearly doubled from 2020, rising from 7% to 13%, driven by a substantial increase in the share of transient business travelers (6%). Florida was more open and accessible than other destinations during the pandemic, which may have contributed to the rapid recovery of business travel. General vacations/non-weekend getaways were the most common leisure purpose, accounting for just under half (45%) of all domestic visitors.

> The seasonality of travel in 2021 looked much like it had in pre-pandemic 2019. Winter visitors accounted for 23% of the annual total compared to 26% in 2019, likely reflecting the impact of waves of COVID variants that bookended the year. Summer proved to be the busiest season, with nearly a third (31%) of visitors, while Fall accounted for 21% and Spring for 24%, comparable in both cases to 2019.

> The average domestic travel party consisted of 2.1 people in 2021, unchanged from the previous year. Single adult travel parties were the most common type, making up 38% of the total, a recovery after having falling from 35% to 32% between 2019 and 2020. Family travel parties also rebounded after having fallen in 2020, gaining 4 percentage points to reach 15%.

> A number of popular activities saw declines in participation in 2021 compared to the previous year, though many outdoor activities that had increased in popularity in 2020 remained more popular than they had been in 2019. Beach/waterfront activities (35%), shopping (22%), and typical restaurant dining (21%) were the most popular activities overall.

> Average expenditures grew at an unprecedented rate in 2021, climbing 35% to $234.14 per person per day. The rate of growth even exceeded the year's historically high inflation rate. Transportation expenditures contributed significantly to the overall increase, as average spending on airfare rose 58% and spending on rental cars rose 59%. Domestic visitors also increased their spending dramatically on shopping (92%), entertainment & recreation (30%), and lodging (27%).

> While average spending trended sharply upward, median household income fell by 8%, likely reflecting an increase in the share of younger visitors who tend to have more moderate incomes.

> In 2021, young adult travelers returned in droves after a year of lockdowns, restrictions, and cancelled plans. The median age of domestic visitors fell from 56 in 2020 to 47, driven by an unprecedented 15 percentage point increase in the share of visitors between the ages of 18 and 34. Millennial and Gen Z travelers accounted for 39% of visitors, their highest combined share on record. Young adult travelers with children at home made up 15% of the total, a six-fold increase from 2020.

> Florida's domestic visitors were significantly more likely to stay in a paid accommodation in 2021 (83%) than they had been in 2020 (77%). Much of the increase was driven by a 4 percentage point increase in the share of visitors staying in non-hotel paid accommodations (41%), likely driven by the growth in popularity of vacation rentals and short-term accommodations during the pandemic. Among visitors who chose to stay in a hotel, 43% selected a high-end accommodation, up from 29% a year prior and in line with the pre-pandemic share.

> Georgia (9.5%) eclipsed New York (9.3%) as the top origin state for domestic visitors in 2021. Alabama (6.4%), Texas (6.3%), and Ohio (5.2%) rounded out the top 5, while Illinois (4.3%) fell from second place the previous year to eighth place.

> Florida's top domestic origin DMAs in 2021 were New York, NY (8.9%), Atlanta, GA (5.7%), and Birmingham, AL (4.1%). Fifth-ranked Philadelphia, PA (3.5%) sixth-ranked Dallas-Fort Worth, TX (2.8%) both saw growth in visitor share from 2020, while fourth-ranked Chicago's (IL) share declined from 6.0% to 3.8%.

DOMESTIC VISITORS

PRIMARY PURPOSE OF TRIP

The share of domestic visitors traveling for leisure fell from historic highs over the previous two years, declining 6 percentage points to 87% in 2021. Transient business travelers were the biggest contributor to the shift - a promising sign of the resiliance of business travel in the wake of the pandemic. General vacations/non-getaway weekends fell from 50% to 45%, while visiting friends/relatives dropped from 21% to 19%. Special events bucked the trend of declining shares in leisure travel by expanding in share 3 percentage points to 8%.

	2019	2020	2021	Change '21/'20
Leisure	**93%**	**93%**	**87%**	▼
General Vacation/Non-weekend Getaway	44%	50%	45%	▼
Visit Friends/Relatives	25%	21%	19%	▼
Getaway Weekend	10%	9%	10%	—
Special Event	7%	5%	8%	▲
Other Leisure/Personal	7%	8%	6%	▼
Business	**7%**	**7%**	**13%**	▲
Transient Business	3%	2%	6%	▲
Seminar/Training	1%	2%	3%	—
Convention	2%	2%	2%	—
Other Group Meetings	1%	1%	2%	—

TRANSPORTATION TYPE

	2019	2020	2021	Change '21/'20
Air	35.0%	27.8%	33.6%	▲
Non-Air	65.0%	72.2%	66.4%	▼

SEASONALITY

The seasonality of domestic travel returned to pre-pandemic form in 2021. Summer was the busiest season, accounting for 31% of visitors, up from 28% in 2019. Slightly more than one-in-five (21%) visitors came in Fall, the slowest season, a comparable share to 2019.

	2019	2020	2021	Change '21/'20
Winter (Dec, Jan, Feb)	26%	53%	23%	▼
Spring (Mar, Apr, May)	25%	16%	24%	▲
Summer (Jun, Jul, Aug)	28%	14%	31%	▲
Fall (Sept, Oct, Nov)	21%	17%	21%	▲

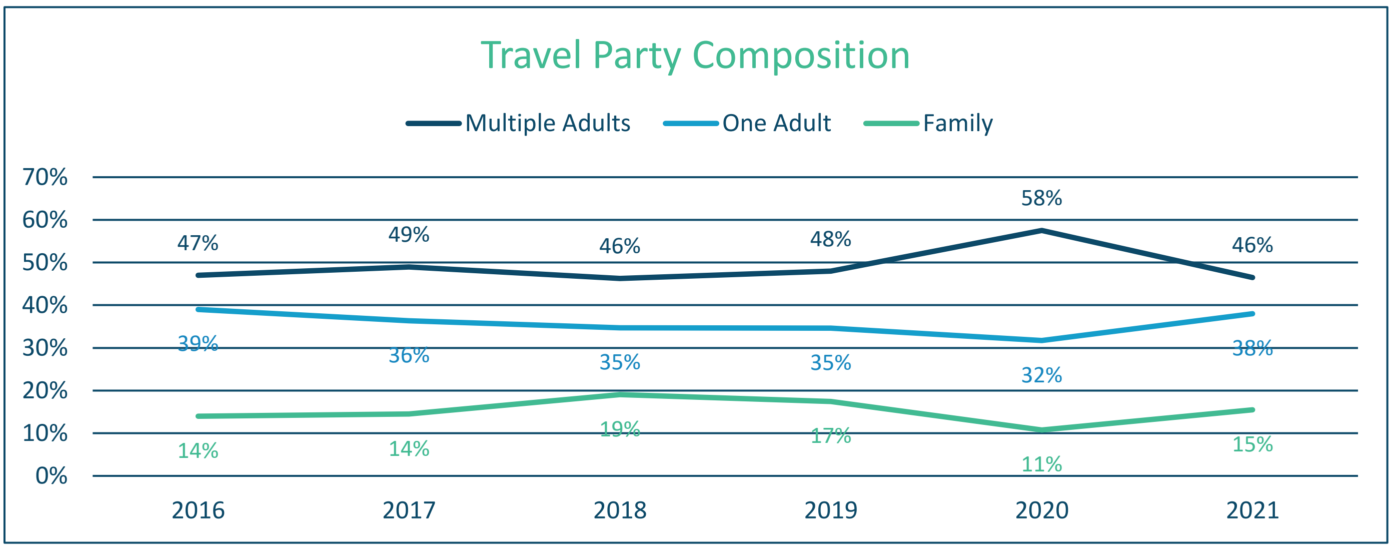
Sources: D.K. Shifflet, VISIT FLORIDA; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS (CONTINUED)

TRAVEL PARTY COMPOSITION

Adults traveling alone made up 38% of travel parties, up from 32% in 2020, while families rose from 11% to 15%. Travel parties consisting of multiple adults fell 12 percentage points to 46%.

	2019	2020	2021	Change '21/'20
One Adult	35%	32%	38%	▲
One Male and One Female	37%	46%	37%	▼
Families	17%	11%	15%	▲
Three or More Adults	6%	6%	6%	—
Two Males or Two Females	5%	6%	4%	▼
Average Party Size	**2.1**	**2.1**	**2.1**	—



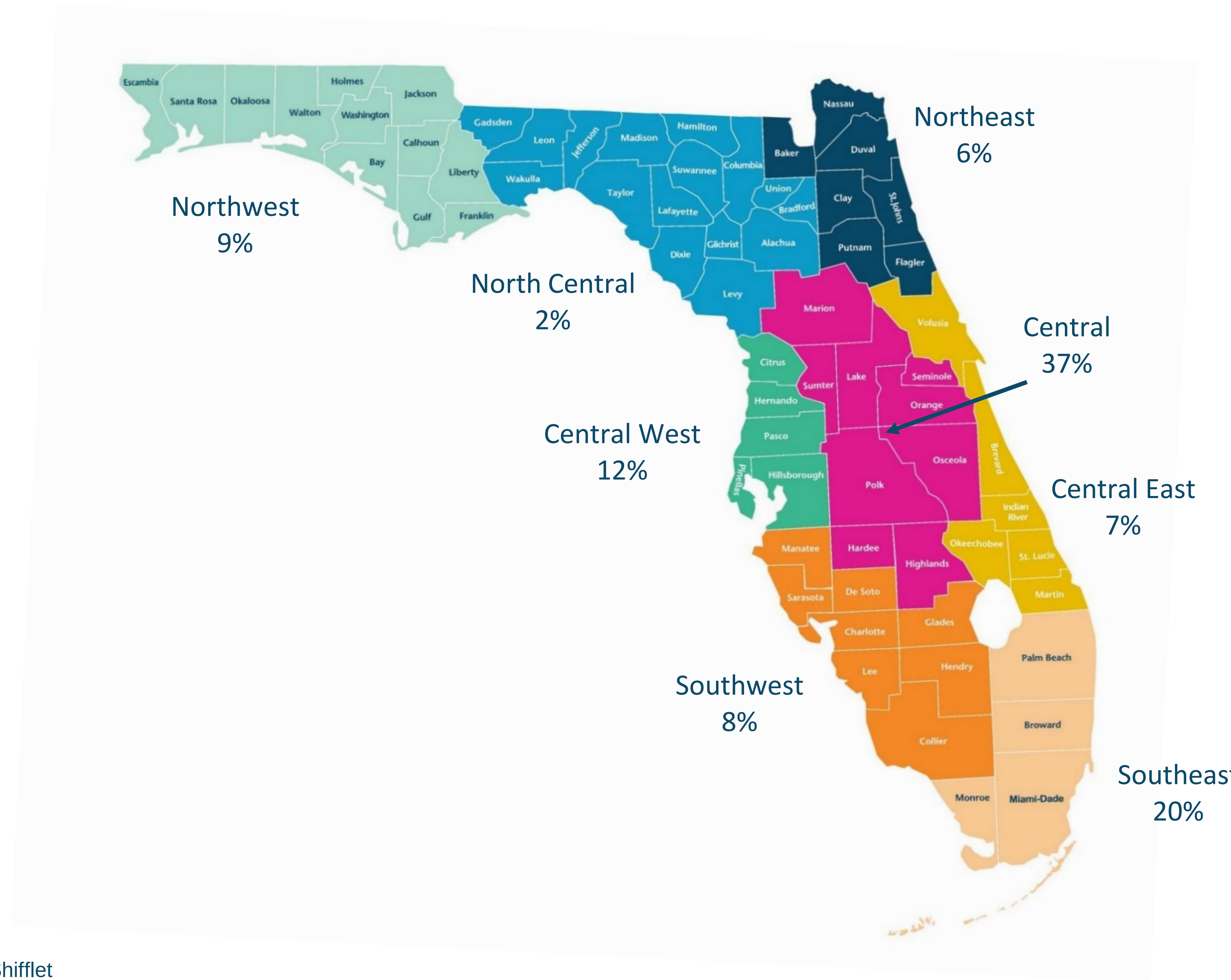
FLORIDA DESTINATION REGIONS

	2019	2020	2021	Change '21/'20
Central	33%	29%	37%	▲
Southeast	19%	20%	20%	—
Central West	13%	14%	12%	▼
Northwest	11%	10%	9%	—
Southwest	9%	14%	8%	▼
Central East	8%	6%	7%	—
Northeast	6%	6%	6%	—
North Central	2%	2%	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	2019	2020	2021	Change '21/'20
1	Georgia	9.4%	7.1%	9.5%	▲
2	New York	10.0%	9.6%	9.3%	—
3	Alabama	3.3%	7.4%	6.4%	▼
4	Texas	5.6%	4.5%	6.3%	▲
5	Ohio	5.4%	3.9%	5.2%	▲
6	Pennsylvania	5.1%	4.3%	5.1%	▲
7	Indiana	3.4%	1.7%	5.1%	▲
8	Illinois	4.1%	7.5%	4.3%	▼
9	Michigan	3.8%	3.4%	4.0%	▲
10	Tennessee	4.2%	3.8%	3.7%	—
11	North Carolina	5.0%	3.4%	3.5%	—
12	New Jersey	4.3%	3.2%	3.4%	—
13	California	3.0%	2.8%	3.2%	—
14	South Carolina	2.3%	2.7%	3.0%	—
15	Massachusetts	3.0%	2.0%	2.4%	—

TOP ORIGIN DESIGNATED MARKET AREAS (DMAs)

Rank	DMA	2019	2020	2021	Change '21/'20
1	New York, NY	11.1%	9.6%	8.9%	▼
2	Atlanta, GA	6.2%	5.8%	5.7%	—
3	Birmingham, AL	1.3%	5.3%	4.1%	▼
4	Chicago, IL	3.7%	6.0%	3.8%	▼
5	Philadelphia, PA	3.5%	2.8%	3.5%	▲
6	Dallas-Fort Worth, TX	1.7%	1.4%	2.8%	▲
7	Boston, MA	3.3%	2.7%	2.5%	—
8	Washington, DC	2.8%	2.8%	2.0%	▼
9	Evansville, IN*	0.4%	0.1%	2.0%	▲
10	Los Angeles, CA	1.3%	1.9%	1.9%	—
11	Columbus, OH	1.4%	0.8%	1.7%	▲
12	Pittsburgh, PA	0.9%	0.8%	1.6%	▲
13	Detroit, MI	2.0%	1.7%	1.6%	—
14	Cleveland-Akron, OH	1.8%	1.0%	1.5%	▲
15	Cincinnati, OH	1.5%	1.1%	1.5%	—

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

DOMESTIC VISITORS (CONTINUED)

ACTIVITIES DURING TRIP

Among the most popular activities for domestic visitors in Florida, rates of participation held steady or declined from the previous year. Share fell 9 percentage points compared to 2019 for beach/waterfront activities - the most popular activity. Many outdoor activities that rose in popularity during the pandemic remained above 2019 levels in participation.

Activity (Multiple Response)	2019	2020	2021	Change '21/'20
Beach/Waterfront	44%	37%	35%	▼
Shopping	29%	24%	22%	▼
Typical Restaurant Dining	-	-	21%	—
Culinary/Dining Experience	32%	25%	21%	▼
Visit Friends/Relatives	34%	31%	19%	▼
Theme/Amusement/Water Park	17%	13%	13%	—
Touring/Sightseeing	16%	15%	11%	▼
Culinary - Special Dining Experience	-	-	9%	—
Birthday	-	11%	7%	▼
Boating/Sailing	4%	7%	7%	—
Nightlife	14%	10%	7%	▼
Parks (national, state, etc.)	12%	10%	6%	▼
Business/Work	5%	9%	6%	▼
Fishing	4%	6%	6%	—
Bicycling	3%	8%	6%	▼
Anniversary	-	5%	6%	—
Movies	7%	5%	5%	—
Golfing	5%	7%	5%	▼
Festival/Fairs (state, craft, etc.)	6%	7%	5%	▼
Hiking	3%	6%	5%	—
Live Music (festivals/concerts/clubs)	9%	5%	5%	—
Historic Sites	8%	9%	4%	▼
Museum, Art Exhibits, etc.	6%	7%	4%	▼
Holiday Celebrations (Thanksgiving, etc.)	5%	7%	4%	▼
Other Activities	1%	3%	4%	—
Camping	1%	5%	3%	▼
Water Sports	4%	5%	3%	▼
Wildlife Viewing (birds, whales, etc.)	7%	7%	3%	▼
Amateur Sports (attend/participate)	3%	8%	3%	▼
Eco/Sustainable Travel	1%	4%	2%	▼
Gambling (slots, cards, horses, etc.)	3%	5%	2%	▼

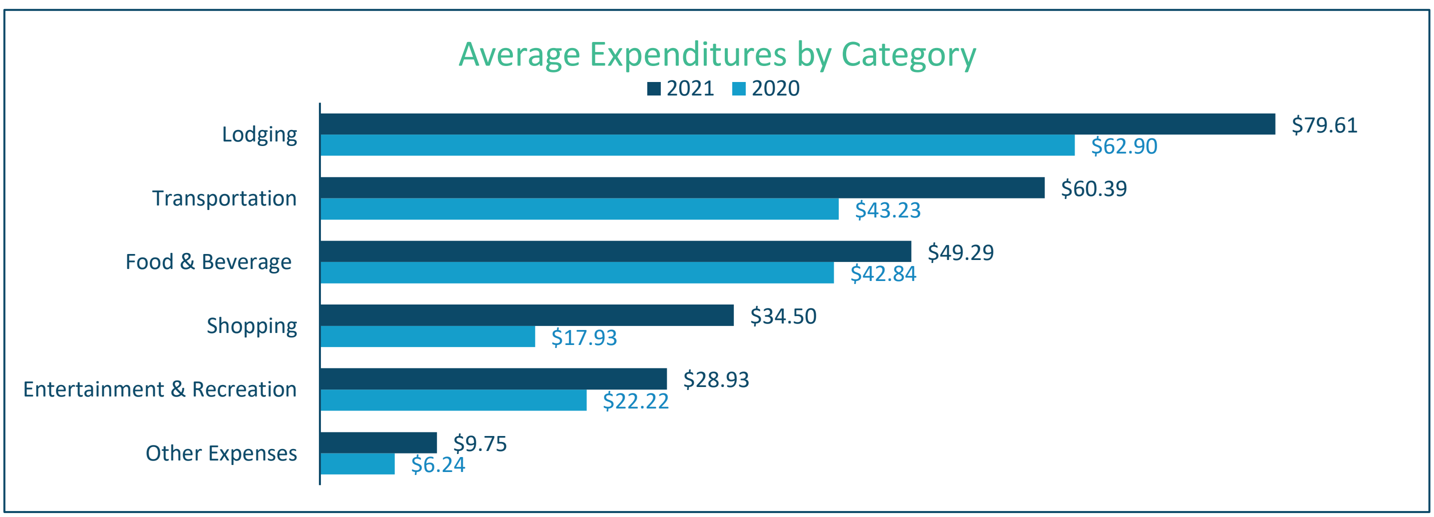
Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS (CONTINUED)

AVERAGE EXPENDITURES PER PERSON PER DAY

Inflation rose at a blistering pace in 2021 (+7%), driven partly by pandemic-related snarls in global supply chains and shifting patterns of demand.[1] Travelers increased their spending at an even faster rate, with average expenditures climbing by 35% from 2020. Transportation expenditures were a key driver of the increase. Average airfare expenses grew by 58%, while rental car expenses grew by 59%. Shopping (+92%) and entertainment & recreation (+30%) also saw sharp increases, suggesting that travelers were willing to spend more on purchases and activities in destination even while spending signficiantly more to get there and back.

	2019	2020	2021	Change '21/'20
Avg. Expenditures (incl. transportation)	**$161.61**	**$173.66**	**$231.11**	**33%**
Avg. Expenditures (excl. transportation)	**$117.58**	**$130.43**	**$173.72**	**33%**
Lodging - Total	$65.35	$62.90	$79.61	27%
Lodging - Room	*$76.22*	*$64.38*	*$77.38*	*20%*
Lodging - Services (internet, parking, etc.)	*$11.67*	*$2.93*	*$9.49*	*224%*
Transportation - Total	$44.03	$43.23	$60.39	40%
Transportation - Total (excluding airfare)	*$22.20*	*$26.39*	*$37.25*	*41%*
Transportation - Airfare	*$55.76*	*$49.90*	*$78.86*	*58%*
Transportation - Rental Car	*$38.45*	*$44.19*	*$70.44*	*59%*
Transportation - Other (taxi, bus, gas, etc.)	*$12.01*	*$16.45*	*$19.58*	*19%*
Food & Beverage	$37.53	$42.84	$49.29	15%
Shopping	$17.71	$17.93	$34.50	92%
Entertainment & Recreation	$19.30	$22.22	$28.93	30%
Other Expenses	$3.93	$6.24	$9.75	56%



[1] 12-month percentage change in CPI. Source: U.S. Bureau of Labor Statistics.

Source: D.K. Shifflet

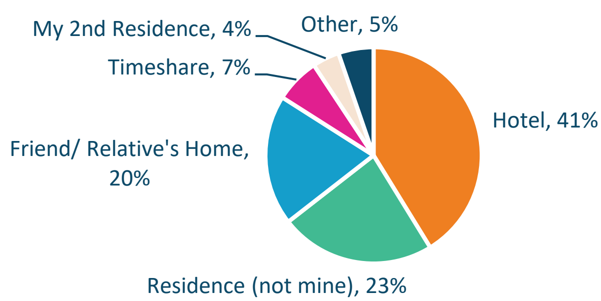
DOMESTIC VISITORS (CONTINUED)

PAID VS. NON-PAID ACCOMMODATIONS

Paid accommodations usage grew between 2019 and 2021 with non-hotel paid options driving most of the change. Hotel and non-hotel paid accommodations were nearly equal with each other - a departure from 2020 and 2019.

	2019	2020	2021	Change '21/'20
Paid	**69%**	**77%**	**83%**	▲
Hotel Paid	*41%*	*40%*	*42%*	▲
Non-Hotel Paid	*29%*	*37%*	*41%*	▲
Non-Paid	**31%**	**23%**	**17%**	▼

ACCOMMODATION TYPE



HOTEL LEVEL

In 2021, the share of visitors staying in both the highest and lowest end accommodations increased substantially while mid-level properties saw declines. Luxury hotels gained a 9 percentage point share from the previous year to reach 17%, while budget hotels rose 5 percentage points to 11%.

	2019	2020	2021	Change '21/'20
High End	**42%**	**28%**	**42%**	▲
Luxury	9%	8%	16%	▲
Upscale	32%	21%	26%	▲
Mid-Level	**46%**	**50%**	**38%**	▼
Upper Moderate	18%	20%	15%	▼
Moderate	28%	30%	22%	▼
Economy	**12%**	**21%**	**20%**	—
Lower Moderate	7%	15%	9%	▼
Budget	5%	6%	11%	▲

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 Florida's domestic visitors fell from 5.3 nights in 2020 down to 4.5 nights in 2021. A shorter stay but still longer than in pre-pandemic 2019. The trend toward longer stays early in the pandemic showed signs of subsiding in 2021, evident in a 4 percentage point decrease in the share of visitors staying 8 or more nights in destination.

	2019	2020	2021	Change '21/'20
1-3 nights	51%	50%	55%	▲
4-7 nights	41%	37%	35%	▼
8+ nights	8%	14%	10%	▼
Average Nights in Florida	**4.2**	**5.3**	**4.5**	▼
Median Nights in Florida	**2.7**	**2.9**	**2.5**	▼

ACCOMMODATION RESERVATION TYPE

The share of domestic visitors reserving accommodations online grew for a third consecutive year, reaching 63%. Non-hotel accommodations sites/apps drove the increase, adding 9 percentage points to reach 15% in 2021. Visitors were less likely to make reservations directly compared to 2020, with the share falling 10 percentage points to 17%.

	2019	2020	2021	Change '21/'20
Made Reservation	**93%**	**93%**	**89%**	▼
Online	48%	56%	63%	▲
Hotel Chain Website/App	*31%*	*35%*	*35%*	—
Non Hotel Accommodations site/app	*5%*	*4%*	*15%*	▲
Travel Website	*12%*	*17%*	*13%*	▼
Other Website	*1%*	*0%*	*0.3%*	—
Called Directly	18%	27%	17%	▼
Travel Agent	2%	4%	5%	—
Other	25%	5%	4%	—
No Reservation	**7%**	**7%**	**11%**	▲

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

DOMESTIC VISITORS (CONTINUED)

TRIP PLANNING TIME FRAME

In 2021, domestic visitors were more likely to have very short booking time frames than in 2020. The share of visitors who booked a week or less in advance of travel reached nearly a quarter (23%), up 9 percentage points from the previous year. By contrast, the share booking 2 months or more in advance dropped 8 percentage points to 45%.

	2019	2020	2021	Change '21/'20
1 Week or Less	10%	14%	23%	▲
2-3 Weeks	15%	15%	13%	▼
1 Month	18%	18%	19%	—
2-3 Months	29%	25%	21%	▼
4-5 Months	9%	9%	8%	—
6 Months	7%	7%	5%	▼
More Than 6 Months	11%	13%	10%	▼

TRIP PLANNING RESOURCES USED

Four-in-five (80%) domestic visitors used a resource of some kind when planning their Florida trip in 2021, up from 74% in 2020. The most commonly used resource was past experience (37%), which declined in usage by 7 percentage points from the year prior. Recommendations from friends and family (19%) saw a similar decline. By contrast, accommodations website/apps grew in popularity, rising from 19% in 2020 to 24% in 2021. Attractions websites (11%) and social networking sites (8%) also increased in visitor share.

	2019	2020	2021	Change '21/'20
Used Resource	**78%**	**74%**	**80%**	▲
Past Experience	34%	44%	37%	▼
Accommodations Websites/Apps	17%	19%	24%	▲
Friend/Family Recommendation	21%	26%	19%	▼
Internet Search (Bing, Google, etc.)	18%	24%	17%	▼
Destination Websites	10%	11%	12%	—
Travel Booking Website (Expedia, etc.)	9%	14%	12%	▼
Attraction Websites	9%	9%	11%	▲
Mapping Websites (Google Maps, etc.)	8%	18%	9%	▼
Review Websites (TripAdvisor, Yelp!, etc.)	9%	8%	8%	—
Social Networking Sites (Facebook, etc.)	5%	4%	8%	▲
No Resource Used	**22%**	**26%**	**20%**	▼

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

DOMESTIC VISITORS (CONTINUED)

AGE OF ADULT TRAVELERS

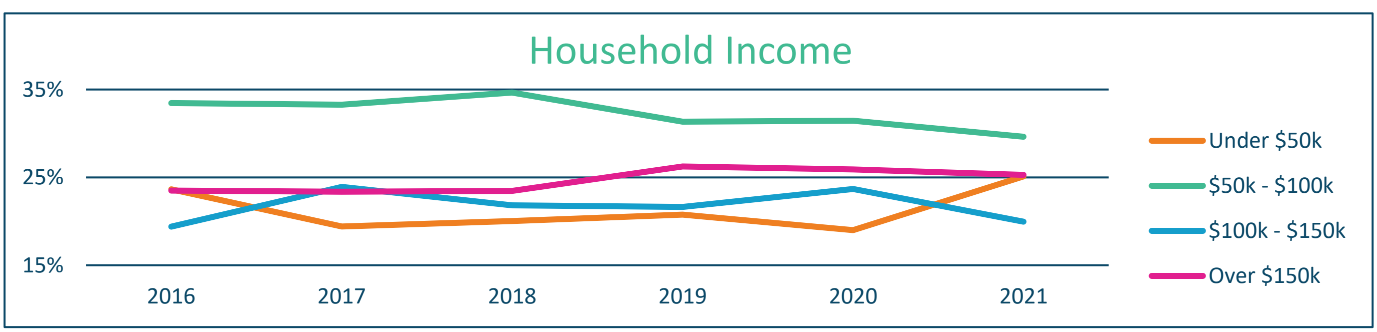
Young travelers returned to Florida in droves in 2021. Visitors between the ages of 18 and 34 recovered from a historic decline in 2020, gaining 15 percentage points in visitor share to reach 28%. This contributed to a drastic decline in median age, which fell from 56 to 47 years in 2021.

	2019	2020	2021	Change '21/'20
18 - 34 Years Old	24%	13%	28%	▲
35 - 49 Years Old	28%	18%	25%	▲
50 - 64 Years Old	28%	37%	27%	▼
65+ Years Old	21%	32%	20%	▼
Average Age	**49.3**	**55.1**	**47.9**	▼
Median Age	**48**	**56**	**47**	▼

HOUSEHOLD INCOME

The increase in young visitors coincided with a decline in household incomes, likely reflecting the fact that younger adults tend to have lower incomes. The median income for domestic visitors in 2021 was $91,661, down -8% from 2020. This downward trend was driven by a 6 percentage point increase in the share of visitors with household incomes under $50,000 (25%).

	2019	2020	2021	Change '21/'20
Under $35,000	11%	12%	18%	▲
$35,000 - $49,999	9%	7%	7%	—
$50,000 - $74,999	15%	14%	15%	—
$75,000 - $99,999	16%	17%	15%	▼
$100,000 - $149,999	22%	24%	20%	▼
$150,000 - $199,999	16%	16%	15%	—
$200,000+	10%	9%	10%	—
Average	**$116,419**	**$116,503**	**$112,820**	-3%
Median	**$96,761**	**$99,479**	**$91,661**	-8%



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

DOMESTIC VISITORS (CONTINUED)

GENERATION

Millennial and Gen Z travelers accounted for 39% of Florida's domestic visitors in 2021, a historic high. As the share of these younger generational cohorts increased, older cohorts declined. The share of Gen X travelers fell 2 percentage points to 25%, while Boomers fell 13 percentage points to 33%.

	2019	2020	2021	Change '21/'20
Millennials/Gen Z (1981 or later)	30%	20%	39%	▲
GenX (1965-1980)	30%	27%	25%	▼
Boomers (1946 -1964)	34%	46%	33%	▼
Silent/GI (1945 or earlier)	5%	7%	3%	▼

LIFESTAGE

While younger travelers became more prevalent in 2021, the moderate mature lifestages remained the most common, accounting for one-in-five visitors (20%). This was down significantly from the previous year. The share of visitors in the Young Family lifestage increased 6 times over to reach 15%, while Moderate Families grew from 1% to 5%. Young & Free travelers, those under 35 with no children, rose from 11% to 14%.

	2019	2020	2021	Change '21/'20
Young & Free (18-34; any income; no kids)	15%	11%	14%	▲
Young Family (18-34; any income; kids in HH)	10%	2%	15%	▲
Maturing & Free (35-54; any income; no kids)	15%	19%	13%	▼
Moderate Family (35-54; <$75K; kids in HH)	5%	1%	5%	▲
Affluent Family (35-54; $75K+; kids in HH)	18%	14%	15%	—
Moderate Mature (55 or older, <$100K; no kids)	18%	28%	20%	▼
Affluent Mature (55 or older; $100K+, no kids)	18%	24%	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:

> Domestic air travel rebounded in 2021 after a severe contraction the previous year due to the coronavirus pandemic. The share of visitors traveling to Florida by air rose to 34%, up from 28% in 2020 but still down from 35% in pre-pandemic 2019.

> Business travel began to recover in 2021. The share of air visitors traveling for business climbed 3 percentage points to 13%, nearly reaching the share (14%) recorded in 2019. Among leisure travelers (87%), the share traveling for a general vacation or non-weekend getaway jumped from 41% in 2020 to 49% in 2021. Air visitors were less likely to be traveling primarily to visit friends and relatives (19%) or for a getaway weekend (9%) compared to the previous year.

> Summer was the most popular season for air visitors in 2021, accounting for 32% of the total. Winter, which received nearly 60% of air visitors in 2020 due to the pandemic, was the least busy season in 2021 as its visitor share dropped to 19%.

> Party size recovered to 2.0 people in 2021 after dropping to 1.8 people in 2020. This increase in party size reflected a drop in the share of one male and one female travel parties, which fell 12 percentage points to 27%. Family travel parties gained 10 percentage points to match the pre-pandemic share of 17%, also lifting party size.

> Nearly half (45%) of air visitors traveled to Central Florida in 2021, making it by far the most popular destination region in the state. The region's visitor share had fallen to 32% in 2020 as many of its theme parks and attractions were closed for months due to the pandemic. Southeast Florida lost the visitor share that it had gained in 2020 as it slid 10 percentage points to 22%.

> Many historically-popular activities continued to have lower rates of participation than they did before the pandemic. Visiting the beach/waterfront slid 4 percentage points to 30% from the previous year but remained the most popular activity in 2021. Visiting friends and relatives fell 14 percentage points to 19%, while culinary/dining experiences dropped 5 percentage points to 21%. Many of the outdoor activities that had seen a boost in popularity early in the pandemic saw declines but still had higher participation than in 2019.

> Average expenditures per person per day (including transportation) rocketed up by +40% in 2021 from the previous year, reaching $315.19. Among the spending categories that saw the largest increases were shopping (+120%), entertainment

and recreation (+95%), and airfare (+50%). The growth of expenditures significantly exceeded the rate of inflation, suggesting that the increase was not solely the result of rising costs but was also propelled by visitors' willingness to spend more on travel to the Sunshine State.

- Florida's domestic air visitors stayed an average of 4.6 nights in 2021, down from 5.6 nights in 2020. The decrease in stay length was the result of a 7 percentage point increase in the share of visitors staying 1 to 3 nights (50%) and a 5 percentage point decrease in the share staying 8 or more nights (11%).
- The median age of air visitors fell from 53 years in 2020 to 46 years in 2021, effectively reversing an early pandemic trend that saw older travelers returning to Florida more quickly than their younger counterparts. The drop in average age was driven by a generational shift; Millennial and Gen Z travelers accounted for a combined 40% share of air visitors, by far the largest share these two young cohorts have held. The growth allowed the group to surpass both Gen X (28%) and the Boomers (31%). Along with these younger travelers came the return of families, as travelers in family lifestages rose by 14 percentage points in visitor share to 37%.
- While air visitors were spending significantly more than they had in previous years, they also tended to have slightly lower incomes. Their median household income fell 5% from the previous year to $106,062.
- New York retained its position as the top origin state for air visitors (11.6%), though the Empire State accounted for a smaller portion of visitation than it had in 2020 or pre-pandemic 2019. Texas (9.2%), Pennsylvania (5.9%), California (5.3%), and Illinois (5.3%) rounded out the top 5 in 2021.
- The top origin DMAs for air visitors in 2021 were New York City (12.3%), Chicago (6.7%), Boston (5.0%), Washington, DC (3.9%), and Philadelphia (3.8%).
- More than half (55%) of air visitors opted to stay in a paid hotel accommodation during their visit in 2021, a remarkable improvement of 12 percentage points from 2020. But the improvement in hotel usage failed to reverse the rising tide of non-hotel paid accommodations, which retained a 27% visitor share from the previous year. As a result, non-paid accommodations lost 12 percentage points in share to paid accommodations, sliding to 18% from 30% in 2020. A majority of air visitors who stayed in a hotel chose a high-end property (51%) in 2021, but they were still less likely to stay in such a property than in pre-pandemic 2019. This likely reflects the slow recovery of meetings and conventions.

DOMESTIC VISITORS BY AIR

PRIMARY PURPOSE OF TRIP

Florida's domestic air visitors were less likely to be traveling for leisure (87%) year over year, though the share remained in line with 2019 (86%). Nearly half (49%) of all visitors were traveling for a general vacation or non-weekend getaway, up from 41% the previous year, while the share visiting friends/relatives fell 5 percentage points to 19%.

	2019	2020	2021	Change '21/'20
Leisure	**86%**	**90%**	**87%**	▼
General Vacation/Non-weekend Getaway	39%	41%	49%	▲
Visit Friends/Relatives	24%	24%	19%	▼
Getaway Weekend	9%	15%	9%	▼
Special Event	8%	5%	6%	—
Other Leisure/Personal	4%	5%	4%	—
Business	**14%**	**10%**	**13%**	▲
Transient Business	5%	3%	5%	▲
Convention	4%	2%	3%	—
Seminar/Training	3%	3%	3%	—
Other Group Meetings	3%	2%	2%	—

SEASONALITY

Summer was the most popular season for air travelers in 2021 (32%), a significant shift from 2019's 23%. A quarter (25%) of air travelers visited in the Fall, a 4 percentage point increase from before the pandemic (21%). Winter share fell considerably to 19%.

	2019	2020	2021	Change '21/'20
Winter (Dec, Jan, Feb)	29%	59%	19%	▼
Spring (Mar, Apr, May)	28%	13%	24%	▲
Summer (Jun, Jul, Aug)	23%	12%	32%	▲
Fall (Sept, Oct, Nov)	21%	17%	25%	▲

LENGTH OF STAY

	2019	2020	2021	Change '21/'20
1-3 nights	41%	43%	50%	▲
4-7 nights	51%	41%	40%	—
8+ nights	8%	16%	11%	▼
Average Nights in Florida	**4.5**	**5.6**	**4.6**	▼
Median Nights in Florida	**3.3**	**3.4**	**2.8**	▼

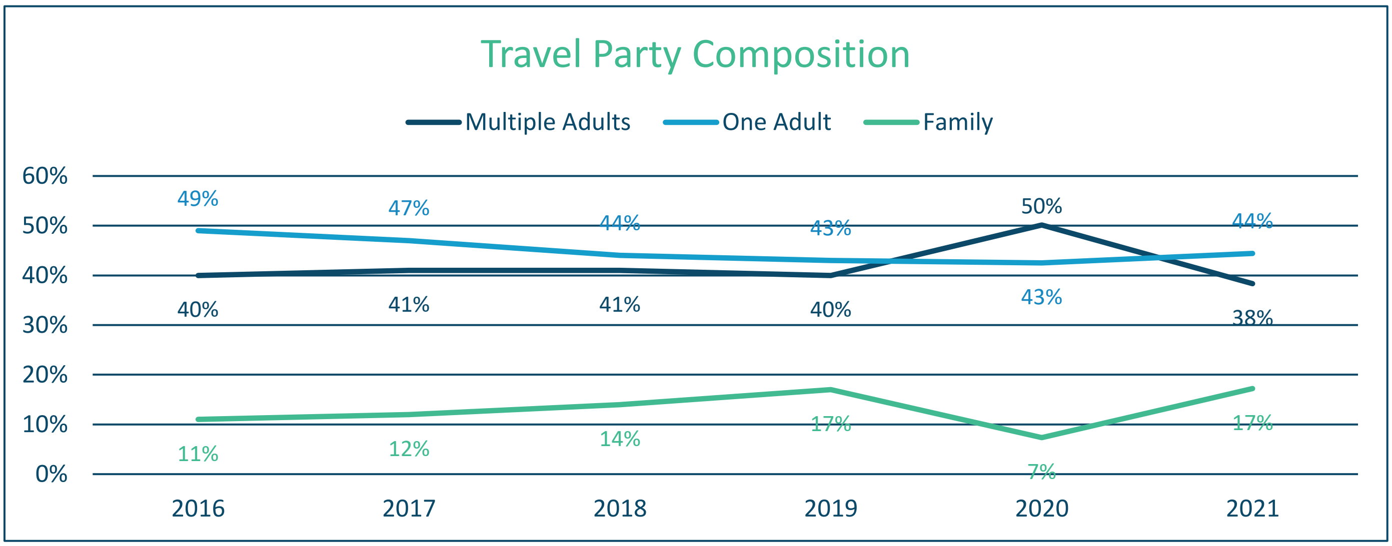
Sources: D.K. Shifflet, VISIT FLORIDA; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS BY AIR (CONTINUED)

TRAVEL PARTY COMPOSITION

The average party size for air visitors rebounded to 2.0 in 2021 after falling to 1.8 in 2020. This was driven in large part by a 10 percentage point recovery in the share of family travel parties (17%).

	2019	2020	2021	Change '21/'20
One Adult	43%	43%	44%	—
One Male and One Female	29%	39%	27%	▼
Families	17%	7%	17%	▲
Three or More Adults	6%	5%	6%	—
Two Males or Two Females	6%	6%	5%	—
Average Party Size	**1.9**	**1.8**	**2.0**	▲



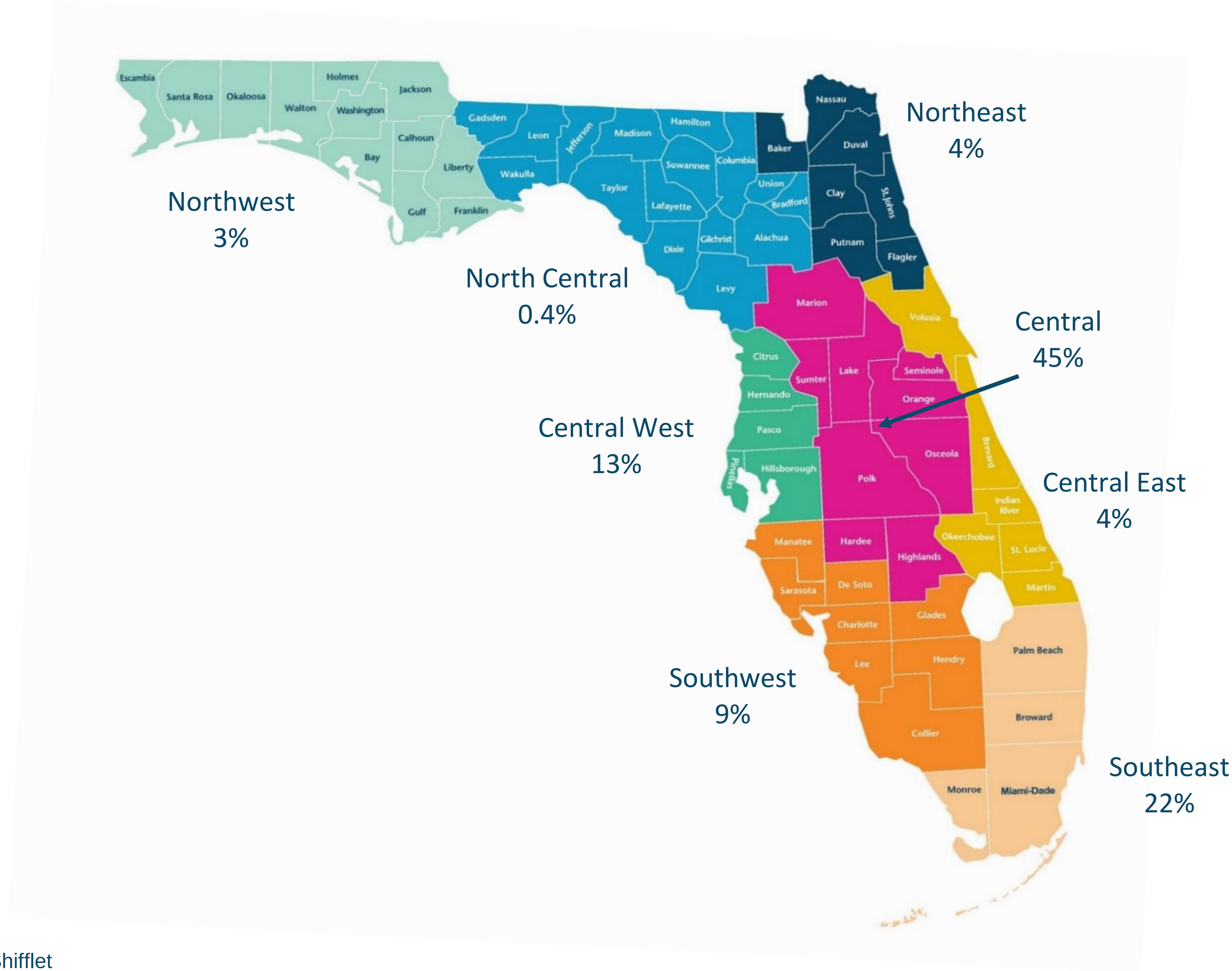
FLORIDA DESTINATION REGIONS

	2019	2020	2021	Change '21/'20
Central	42%	32%	45%	▲
Southeast	22%	32%	22%	▼
Central West	14%	11%	13%	▲
Southwest	10%	13%	9%	▼
Central East	6%	5%	4%	—
Northeast	4%	4%	4%	—
Northwest	2%	2%	3%	—
North Central	1%	1%	0.4%	—

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 retained its status as the top origin state for air visitors (11.6%) in 2021, despite its visitor share declining for a second consecutive year. Conversely, Texas grew its share to become the second-ranked origin state (9.2%), up from third in 2020. Illinois dropped from second to fifth, while North Carolina climbed from outside the top 20 to the 10th spot.

Rank	State	2019	2020	2021	Change '21/'20
1	New York	14.5%	11.9%	11.6%	—
2	Texas	5.7%	6.0%	9.2%	▲
3	Pennsylvania	4.7%	4.6%	5.9%	▲
4	California	4.5%	4.9%	5.3%	—
5	Illinois	4.9%	9.0%	5.3%	▼
6	Ohio	7.6%	4.7%	4.9%	—
7	Michigan	4.1%	4.5%	4.9%	—
8	Massachusetts	4.6%	4.7%	4.6%	—
9	New Jersey	5.0%	4.8%	4.5%	—
10	North Carolina	2.1%	1.3%	4.0%	▲

TOP ORIGIN DESIGNATED MARKET AREAS (DMAs)

New York City was the top origin DMA in 2021, with nearly double the share (12.3%) of the second-ranked market (Chicago, 6.7%). Boston, Washington, DC, and Philadelphia comprised the remainder of the top five. Two of the largest Southern DMAs, Atlanta and Dallas-Fort Worth, grew their visitor share beyond 2020 and pre-pandemic levels, while many Northeastern DMAs were flat or negative.

Rank	DMA	2019	2020	2021	Change '21/'20
1	New York, NY	15.8%	14.9%	12.3%	▼
2	Chicago, IL	5.2%	5.8%	6.7%	▲
3	Boston, MA	5.3%	5.4%	5.0%	—
4	Washington, DC	3.5%	5.1%	3.9%	▼
5	Philadelphia, PA	4.5%	3.7%	3.8%	—
6	Atlanta, GA	2.4%	2.8%	3.5%	▲
7	Dallas-Fort Worth, TX	2.3%	2.2%	3.4%	▲
8	Los Angeles, CA	2.9%	2.6%	2.7%	—
9	Detroit, MI	2.3%	2.6%	2.4%	—
10	Houston, TX	1.5%	2.0%	2.0%	—

Note: The Origin DMA data combines two years of data for each year shown to obtain a larger sample size, where 2021 figures are based on CY 2021-2020 data, 2020 figures are based on CY 2020-2019 data, and 2019 figures are based on CY 2019-2018 data.

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

DOMESTIC VISITORS BY AIR (CONTINUED)

ACTIVITIES DURING TRIP

Air visitors showed less of a propensity to participate in many popular activities than they did in 2020. The percentage of visitors who visited the beach/waterfront fell 4 percentage points to 30%, while culinary/dining experiences fell 5 percentage points to 21%. Visiting friends and relatives experienced a notable decline; its visitor share slid from 33% in 2020 to 19%.

Activity (Multiple Response)	2019	2020	2021	Change '21/'20
Beach/Waterfront	41%	34%	30%	▼
Shopping	30%	21%	22%	—
Typical Restaurant Dining	-	-	22%	—
Culinary/Dining Experience	35%	26%	21%	▼
Visit Friends/Relatives	33%	33%	19%	▼
Theme/Amusement/Water Parks	19%	14%	15%	—
Touring/Sightseeing	16%	13%	10%	▼
Special Dining Experience	-	-	9%	—
Business/Work	7%	12%	8%	▼
Nightlife (bar, nightclub, etc.)	19%	12%	8%	▼
Birthday	-	13%	8%	▼
Boating/Sailing	4%	8%	7%	—
Parks (national/state, etc.)	10%	10%	6%	▼
Biking	3%	9%	6%	▼
Anniversary	-	6%	6%	—
Fishing	2%	8%	5%	▼
Golfing	4%	9%	5%	▼
Museum, Art Exhibits, etc.	5%	8%	4%	▼
Live Music	9%	7%	4%	▼
Festivals/Fairs (state, craft, etc.)	6%	6%	4%	▼
Water Sports	4%	5%	4%	—
Holiday Celebration	4%	7%	4%	▼
Movies	7%	8%	4%	▼
Historic Sites	6%	9%	3%	▼
Spa / Wellness	3%	5%	3%	▼
Hiking	2%	7%	3%	▼
Gambling (slots, cards, horses, etc.)	3%	6%	3%	▼
Camping	0.3%	5%	3%	▼
Zoo/Aquarium	4%	6%	3%	▼
Wedding	2%	5%	2%	▼
Other Activities	1%	3%	2%	—

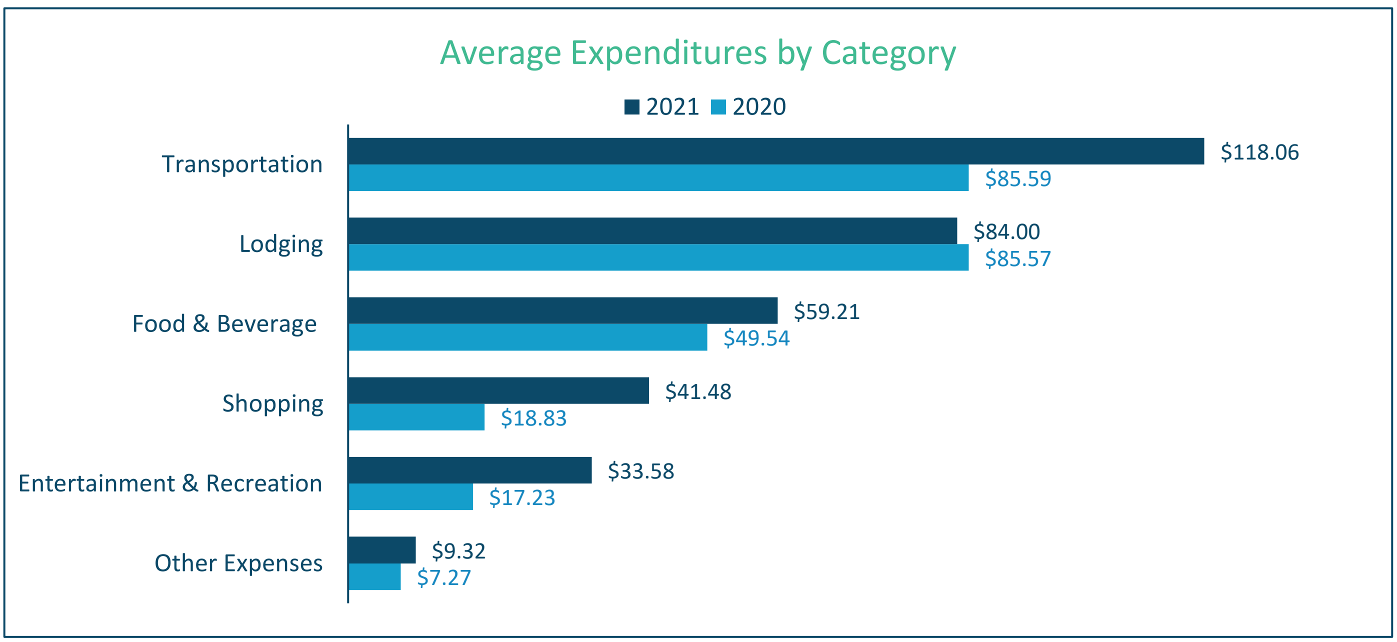
Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS BY AIR (CONTINUED)

AVERAGE EXPENDITURES PER PERSON PER DAY

The average daily per person expenditures of domestic air visitors grew 40% year-over-year in 2021, exceeding the growth rate of drive visitors' expenditures (+36%). Shopping was the fastest-growing expense category (+120%) followed by entertainment & recreation (+95%). Lodging expenditures cooled, declining by 2% as the pandemic-induced shift toward pricier vacation rentals and short-term accommodations began to moderate.

	2019	2020	2021	Change '21/'20
Avg. Expenditures (incl. transportation)	**$199.91**	**$225.71**	**$315.19**	**40%**
Avg. Expenditures (excl. transportation)	**$123.20**	**$140.12**	**$197.13**	**41%**
Transportation - Total	$76.71	$85.59	$118.06	38%
Transportation - Total (excluding airfare)	*$22.55*	*$33.09*	*$39.41*	*19%*
Transportation - Airfare	*$59.14*	*$52.59*	*$78.86*	*50%*
Transportation - Rental Car	*$38.47*	*$45.40*	*$58.80*	*30%*
Transportation - Other (taxi, bus, gas, etc.)	*$6.60*	*$12.21*	*$14.02*	*15%*
Lodging - Total	$73.07	$85.57	$84.00	-2%
Lodging - Room	*$88.71*	*$84.64*	*$86.85*	*3%*
Lodging - Services (internet, parking, etc.)	*$14.15*	*$4.60*	*$5.63*	*22%*
Food & Beverage	$42.39	$49.54	$59.21	20%
Shopping	$17.16	$18.83	$41.48	120%
Entertainment & Recreation	$18.94	$17.23	$33.58	95%
Other Expenses	$4.24	$7.27	$9.32	28%



Source: D.K. Shifflet

VISIT FLORIDA

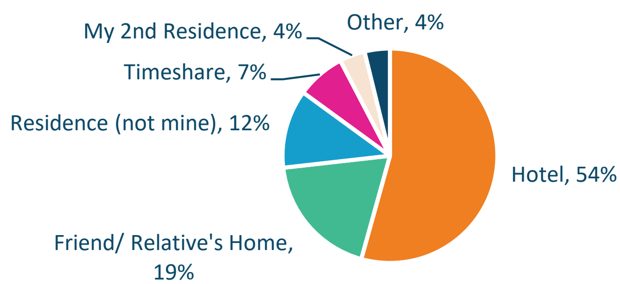
DOMESTIC VISITORS BY AIR (CONTINUED)

PAID VS. NON-PAID ACCOMMODATIONS

Air travelers showed a strong propensity for paid accommodations in 2021, as evidenced by a 12 percentage point increase in the share staying in paid hotels (55%). The share staying in the home of a friend or relative slid from 27% in 2020 to 19%.

	2019	2020	2021	Change '21/'20
Paid	**72%**	**70%**	**82%**	▲
Hotel Paid	*48%*	*43%*	*55%*	▲
Non-Hotel Paid	*23%*	*27%*	*27%*	—
Non-Paid	**28%**	**30%**	**18%**	▼

ACCOMMODATION TYPE



HOTEL LEVEL

With business travel rebounding and travelers returning to hotels in large numbers, high-end and mid-level hotels showed signs of recovering the visitor share they lost in 2020. The share of visitors staying in these accommodations rose 3 percentage points to 88%, while economy hotels fell by a comparable amount to 12%.

	2019	2020	2021	Change '21/'20
High-End	**54%**	**51%**	**51%**	—
Luxury	13%	15%	19%	▲
Upscale	41%	35%	32%	▼
Mid-Level	**38%**	**35%**	**37%**	▲
Upper Moderate	17%	13%	17%	▲
Moderate	21%	22%	20%	▼
Economy	**7%**	**15%**	**12%**	▼
Lower Moderate	5%	9%	7%	▼
Budget	2%	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 a reversal, Florida visitors were more likely to book air travel through traditional channels such as ticket counters/offices (10%) and travel agents (5%) than they had been in either 2020 or 2019. Overall, the share of visitors booking directly through an airline company fell 4 percentage points year-over-year to 81% because of a steep decline in the use of airline websites/apps.

	2019	2020	2021	Change '21/'20
Airline Company	77%	86%	81%	▼
Airline Website/App	*71%*	*72%*	*62%*	▼
Ticket Counter or Office	*3%*	*6%*	*10%*	▲
Contact Airline Directly (call, email, etc.)	*3%*	*7%*	*9%*	▲
Someone Else Made Reservation	-	5%	6%	—
Other Travel Website/App	12%	6%	6%	—
Travel Agent	3%	2%	5%	▲
Corporate Travel Department	7%	2%	2%	—
Other	1%	0.1%	0.1%	—

METHOD OF MAKING RESERVATION FOR ACCOMMODATIONS

When booking lodging in 2021, air visitors were slightly less likely to book online (66%) and more likely to book directly (15%) or with a travel agent (8%) than in the previous year. Still, online methods remained the most popular choice overall. The share of air visitors booking through a hotel chain app/site fell from 47% to 44%, while non-hotel accommodation apps/sites climbed from 4% to 13%.

	2019	2020	2021	Change '21/'20
Made Reservation	**96%**	**96%**	**92%**	▼
Online	44%	69%	66%	▼
Hotel Chain Website/App	*31%*	*47%*	*44%*	▼
Non-Hotel Accommodations Site/App	*4%*	*4%*	*13%*	▲
Travel Website	*9%*	*18%*	*9%*	▼
Other Website	*1%*	*0%*	*0.5%*	—
Called Directly	14%	13%	15%	▲
Corporate Travel Resource	8%	3%	3%	—
Travel Agent	2%	5%	8%	▲
Other	28%	6%	1%	▼
No Reservation	**4%**	**4%**	**8%**	▲

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

DOMESTIC VISITORS BY AIR (CONTINUED)

TRIP PLANNING TIME FRAME

Planning time frames of a week or less increased in share for a second consecutive year in 2021 with a gain of 12 percentage points over pre-pandemic 2019. Meanwhile, time frames between 2 weeks and 1 month fell to 35% after having climbed 10 percentage points to 43% the previous year. The share of air visitors booking 6 months or more out from departure dropped to 12% from 15% in 2020.

	2019	2020	2021	Change '21/'20
1 Week or Less	7%	9%	19%	▲
2-3 Weeks	13%	19%	14%	▼
1 Month	19%	23%	21%	▼
2-3 Months	33%	26%	26%	—
4-5 Months	10%	8%	8%	—
6 Months	7%	6%	4%	▼
More Than 6 Months	9%	9%	8%	—

TRIP PLANNING RESOURCES USED

More than four out of five (81%) air visitors who traveled to Florida in 2021 used one or more resource to plan their trip, up from 71% in 2020. Past experience ranked as the top resource and was utilized by 38% of visitors, down from 41% in 2020. Friend/family recommendations also declined in usage, falling from 25% to 21%. Meanwhile, many online resources grew in popularity as travelers sought a broader range of options to help navigate through pandemic-related challenges.

	2019	2020	2021	Change '21/'20
Used Resource	**78%**	**71%**	**81%**	▲
Past Experience	35%	41%	38%	▼
Accommodations Websites/Apps	17%	18%	25%	▲
Friend/Family Recommendation	20%	25%	21%	▼
Internet Search (Google, Yahoo!, etc.)	17%	19%	21%	▲
Attraction Websites	9%	10%	13%	▲
Destination Websites	10%	12%	13%	—
Travel Booking Website (Expedia, etc.)	9%	18%	13%	▼
Social Networking Sites (Facebook, etc.)	4%	7%	9%	▲
Guest Ratings and Review Websites	8%	8%	8%	—
Destination Visitor Guides - Online	4%	7%	8%	—
No Resource Used	**22%**	**29%**	**19%**	▼

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

DOMESTIC VISITORS BY AIR (CONTINUED)

AGE OF ADULT TRAVELERS

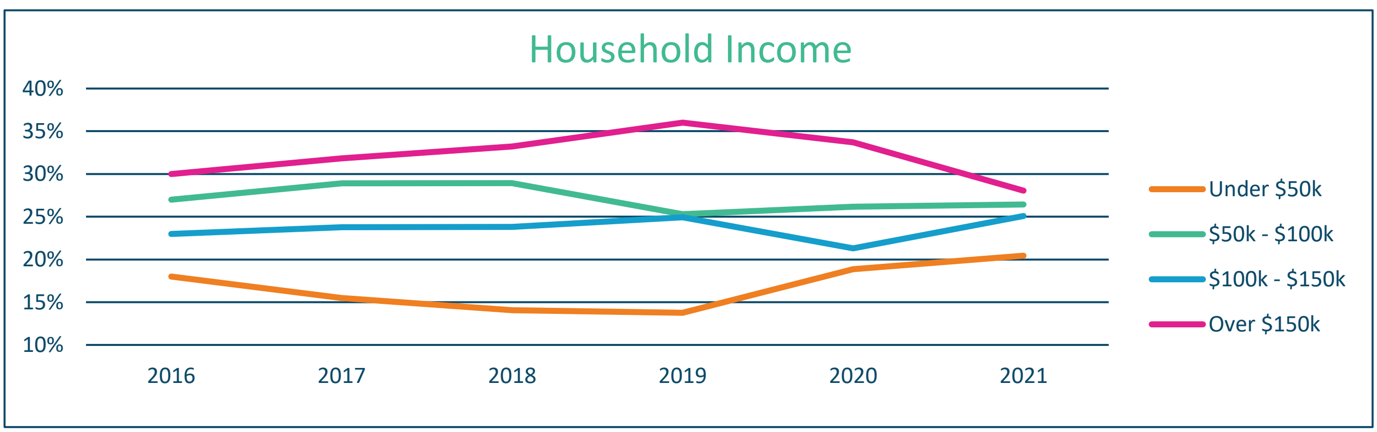
Travelers between the ages of 18 and 49 accounted for 55% of air visitors in 2021, a remarkable rebound to pre-pandemic levels. Travelers over the age of 65 fell from 25% to 18% in visitor share. As a result, the average age of air visitors fell from 51.8 to 47.6 years.

	2019	2020	2021	Change '21/'20
18 - 34 Years Old	23%	18%	26%	▲
35 - 49 Years Old	32%	23%	29%	▲
50 - 64 Years Old	29%	34%	26%	▼
65+ Years Old	16%	25%	18%	▼
Average Age	**48.3**	**51.8**	**47.6**	▼
Median Age	**47**	**53**	**46**	▼

HOUSEHOLD INCOME

Florida's air visitors had a median household income of $106,062 in 2021, down -5% from 2021. An 8 percentage point decrease in the share of visitors with incomes over $200,000 dollars drove the decline. Visitors with incomes under $50,000 accounted for 20% of the total.

	2019	2020	2021	Change '21/'20
Under $50,000	14%	19%	20%	—
$50,000 - $74,999	11%	12%	13%	—
$75,000 - $99,999	14%	14%	13%	—
$100,000 - $149,999	25%	21%	25%	▲
$150,000 - $199,999	19%	15%	17%	▲
$200,000+	17%	19%	11%	▼
Average	**$141,144**	**$137,873**	**$122,164**	-11%
Median	**$122,271**	**$111,569**	**$106,062**	-5%



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

DOMESTIC VISITORS BY AIR (CONTINUED)

GENERATION

The Millennial and Gen Z cohort saw a historic gain in visitor share in 2021; the group climbed 14 percentage points to 40% - surpassing its 2019 share. This marked a significant reversal from the trends observed in 2020, when Florida's visitors skewed older due to travel hesitancy among younger cohorts.

	2019	2020	2021	Change '21/'20
Millennials/Gen Z (1981 or later)	30%	26%	40%	▲
GenX (1965-1980)	34%	29%	28%	—
Boomers (1946 -1964)	33%	39%	31%	▼
Silent/GI (1945 or earlier)	4%	5%	2%	▼

LIFESTAGE

Travelers in the family lifestages, who had been more reluctant to travel in the early months of the pandemic, rebounded rapidly in 2021. These family travelers accounted for less than a quarter (23%) of air visitors in 2020, but were 37% of the total in 2021. Moderate and Affluent Matures lost a combined 10 points in share.

	2019	2020	2021	Change '21/'20
Young & Free (18-34; any income; no kids)	15%	14%	13%	—
Young Family (18-34; any income; kids in HH)	9%	4%	14%	▲
Maturing & Free (35-54; any income; no kids)	16%	19%	17%	▼
Moderate Family (35-54; <$75K; kids in HH)	4%	2%	6%	▲
Affluent Family (35-54; $75K+; kids in HH)	23%	17%	17%	—
Moderate Mature (55 or older, <$100K; no kids)	13%	22%	14%	▼
Affluent Mature (55 or older; $100K+, no kids)	20%	22%	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:

> Two-thirds of Florida's domestic visitors traveled to the Sunshine State by automobile in 2021, a slightly higher share than in 2019 (65.0%). This marked a return to relative normalcy after a pandemic-induced spike in the share of auto visitors in 2020.

> Average party size declined to 2.1 people, down from 2.2 in 2020 and 2019. A large increase in the share of solo travelers likely drove the decrease, as the share of adults traveling alone grew 8 percentage points to 34%. Family travel parties also increased in share, adding 4 percentage points in visitor share to reach 14%, though this was still lower than the pre-pandemic 2019 share of 18%. Despite these changes, multiple adult travel parties accounted for the majority (52%) of visitors traveling by car.

> Beach/waterfront visits were the top activity for drive visitors in 2021, with 39% heading to the water while in Florida. Shopping (23%), culinary/dining experiences (21%), typical restaurant dining (20%), and visiting friends/relatives (19%) rounded out the top 5. For nearly all activities, participation rates either held steady or declined from 2020. Visiting friends/relatives dropped 13 percentage points in participation, while touring/sightseeing lost 5 percentage points (11%) and amateur sports lost 6 percentage points (2%).

> The average expenditure by drive visitors in 2021 rose to $189.97 per person per day (including transportation), a 36% increase from the previous year. The increase was remarkable by historical standards, but it slightly lagged the growth recorded among air visitors. Transportation costs increasing by 60% were a major contributor; within the category, rental car expenditures nearly doubled (+95%) from 2020. Lodging expenditures rose 33%, shopping increased by 104% and food & beverage also saw a notable rise of 18%.

> The average length of stay fell to 4.6 nights for drive visitors in 2021. This was down from 5.5 nights in 2020, but well above the 4.0 nights observed in pre-pandemic 2019. An increase in the share of short stays lasting 1 to 3 nights was the key contributor to the decrease in length of stay, as the category rose 6 percentage points to 55%. Stays of 4 to 8 nights, on the other hand, lost 4 percentage points in share, dropping to 34%.

> Domestic drive visitors had a median household income of $85,344 in 2021, down by -9% from the previous year. The decrease was attributable to a significant jump in the share of visitors with incomes of $35,000 or less, which rose to 21% from 12% in 2020. However, an increase was also seen in the share of visitors earning $200,000 or more, which gained 4 percentage in visitor share to reach 10%.

> The top origin states for domestic drive visitors in 2021 were Georgia (12.6%), Alabama (8.7%), New York (8.2%), Indiana (6.7%), and Ohio (5.4%).

> Paid accommodations were used by 82% of drive visitors in 2021, up from 79% in 2020 and 66% in 2019. The growth in popularity of non-hotel paid accommodations drove the increase, with such accommodations gaining 7 percentage points in share to account for 46% of the total. Just under a third (29%) of drive visitors opted to stay in a residence that they didn't own, which would include vacation rentals and shared accommodations such as those offered on AirBnB and VRBO. The pandemic gave a boost to these accommodations, as many travelers sought greater privacy and a more home-like atmosphere than they believed hotels could offer.

DOMESTIC VISITORS BY AUTOMOBILE

PRIMARY PURPOSE OF TRIP

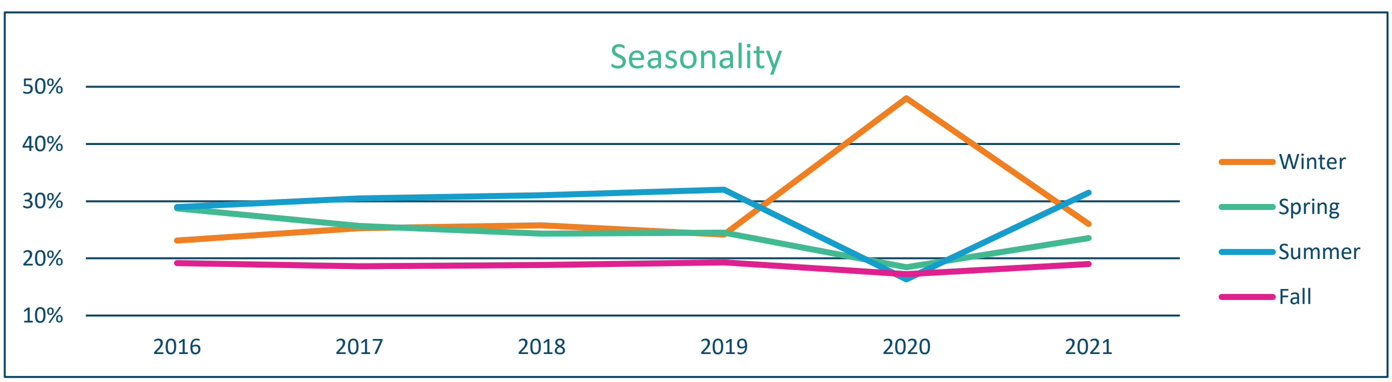
The share of drive visitors traveling for leisure declined for a third consecutive year, falling to 89%. Declines in the share of visitors traveling to Florida for general vacations (46%) or to visit friends/relatives (18%) drove the shift away from leisure. On the other hand, business travel rose 6 percentage points to 11%.

	2019	2020	2021	Change '21/'20
Leisure	**96%**	**95%**	**89%**	▼
General Vacation	45%	53%	46%	▼
Visit Friends/Relatives	26%	22%	18%	▼
Getaway Weekend	12%	6%	10%	▲
Special Event	7%	5%	9%	▲
Other Leisure/Personal	7%	9%	6%	▼
Business	**4%**	**5%**	**11%**	▲
Convention/Seminar/Meeting	2%	3%	6%	▲
Transient Business	2%	2%	6%	▲

SEASONALITY

The pandemic-related distortions in seasonality that were evident in 2020 dissipated as the cadence of travel began to approximate pre-pandemic norms in 2021. Summer regained its position as the most popular season for drive visitors (31%), while Winter fell back to second place (26%). Just under a quarter visited in Spring (24%), while 19% came in the Fall.

	2019	2020	2021	Change '21/'20
Winter (Dec, Jan, Feb)	24%	48%	26%	▼
Spring (Mar, Apr, May)	25%	18%	24%	▲
Summer (Jun, Jul, Aug)	32%	16%	31%	▲
Fall (Sept, Oct, Nov)	19%	17%	19%	▲



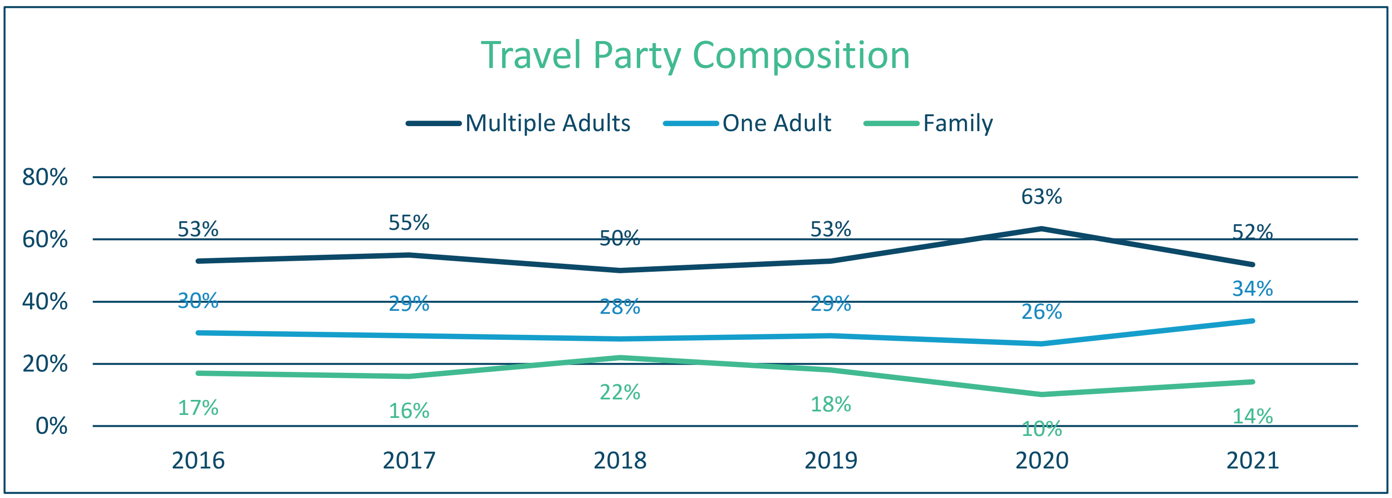
Sources: D.K. Shifflet, VISIT FLORIDA; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS BY AUTOMOBILE (CONTINUED)

TRAVEL PARTY COMPOSITION

Drive visitors had a slightly smaller party size in 2021 (2.1) than in 2020 (2.2), a decline that was likely attributable to an 8-percentage point increase in the share solo travelersS. The decline in family travelers that occurred in 2020 was partly reversed, as evidenced by a 4-percentage point increase in visitor share for the segment. Multiple adult travel parties accounted for the majority (52%), comparable to pre-pandemic 2019 (53%).

	2019	2020	2021	Change '21/'20
One Male and One Female	42%	52%	43%	▼
One Adult	29%	26%	34%	▲
Families	18%	10%	14%	▲
Three or More Adults	7%	6%	6%	—
Two Males or Two Females	4%	5%	4%	—
Average Party Size	**2.2**	**2.2**	**2.1**	▼



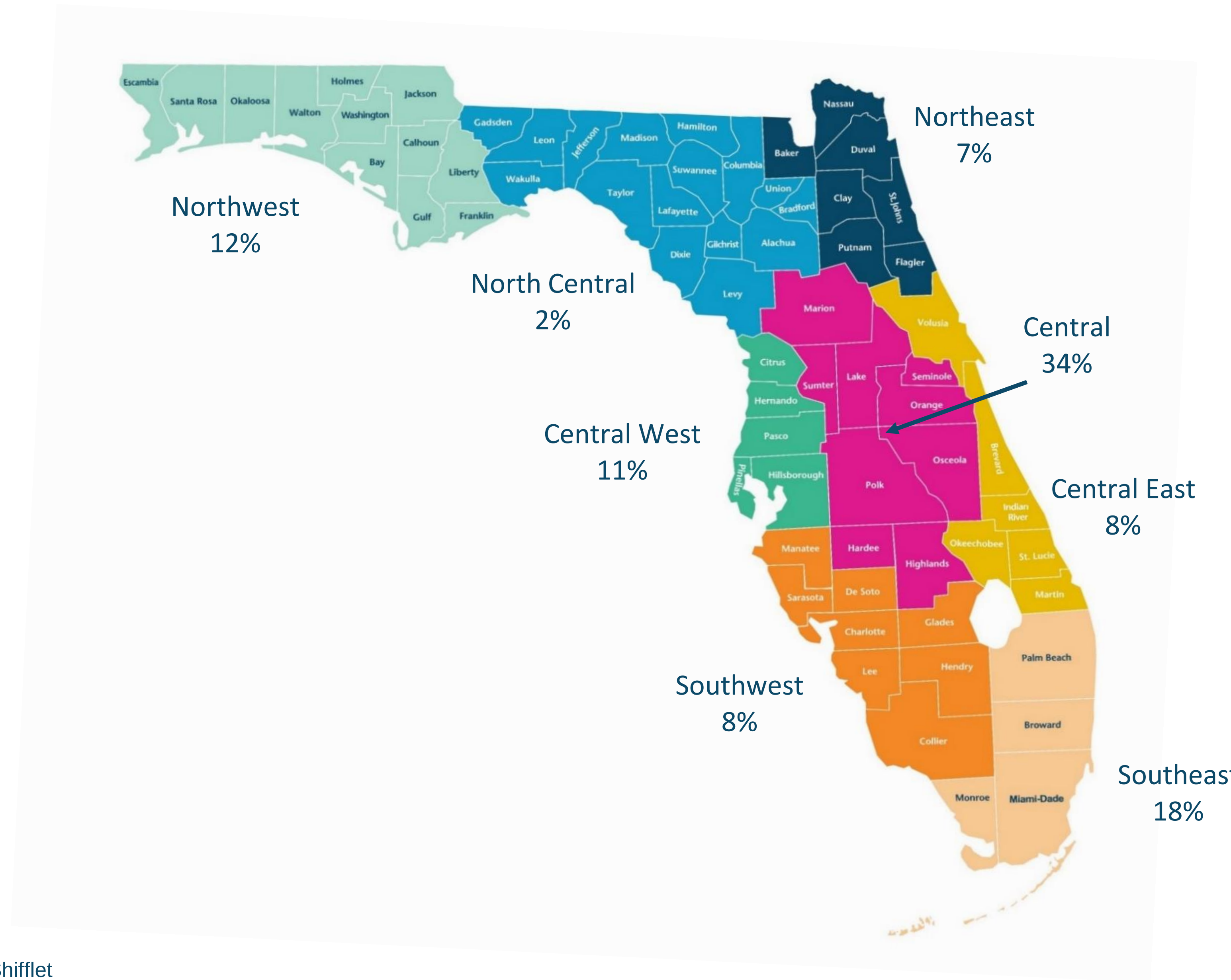
FLORIDA DESTINATION REGIONS

	2019	2020	2021	Change '21/'20
Central	29%	27%	34%	▲
Southeast	14%	15%	18%	▲
Northwest	17%	14%	12%	▼
Central West	12%	14%	11%	▼
Southwest	8%	14%	8%	▼
Central East	10%	6%	8%	▲
Northeast	7%	8%	7%	—
North Central	3%	2%	2%	—

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

After falling behind Alabama in 2020, Georgia regained the title of top origin state with a 12.6% share of drive visitors in 2021. Alabama retained a share of (8.7%) - above pre-pandemic levels - for second place. New York held a larger share (8.2%) than it had in 2019, as did Indiana (6.7%) and Ohio (5.4%). Illinois fell from third in 2020 to tenth with a share of 3.8%.

Rank	State	2019	2020	2021	Change '21/'20
1	Georgia	14.4%	9.1%	12.6%	▲
2	Alabama	5.0%	10.8%	8.7%	▼
3	New York	6.4%	4.2%	8.2%	▲
4	Indiana	3.9%	1.6%	6.7%	▲
5	Ohio	4.3%	3.8%	5.4%	▲
6	Tennessee	5.3%	4.8%	4.6%	—
7	Pennsylvania	4.9%	4.3%	4.6%	—
8	Texas	5.8%	4.2%	4.4%	—
9	South Carolina	3.5%	3.5%	3.9%	—
10	Illinois	3.7%	7.1%	3.8%	▼

TOP ORIGIN DESIGNATED MARKET AREAS (DMAs)

The top origin DMA for drivers was Atlanta with 7.0% of the total - down from 8.2% in 2020 and 10.7% in 2019. By contrast, Birmingham's share rose to 6.8% from 4.6% in 2020 and 2.3% in 2019. New York (5.8%), Chicago (3.8%), and Philadelphia (2.9%) rounded out the top 5.

Rank	DMA	2019	2020	2021	Change '21/'20
1	Atlanta, GA	10.7%	8.2%	7.0%	▼
2	Birmingham, AL	2.3%	4.6%	6.8%	▲
3	New York, NY	6.5%	5.6%	5.8%	—
4	Chicago, IL	2.7%	4.1%	3.8%	—
5	Philadelphia, PA	2.6%	2.6%	2.9%	—
6	Dallas-Fort Worth, TX	1.8%	1.4%	1.7%	—
7	Washington, DC	2.5%	1.7%	1.6%	—
8	Cincinnati, OH	1.8%	1.7%	1.6%	—
9	St. Louis, MO	1.3%	2.0%	1.5%	▼
10	Knoxville, TN	0.8%	1.2%	1.5%	—

Note: The Origin DMA data combines two years of data for each year shown to obtain a larger sample size, where 2021 figures are based on CY 2021-2020 data, 2020 figures are based on CY 2020-2019 data, and 2019 figures are based on CY 2019-2018 data.

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

DOMESTIC VISITORS BY AUTOMOBILE (CONTINUED)

ACTIVITIES DURING TRIP

Drive visitors had equal or lower rates of participation in most activities in 2021 compared to 2020. Beach/waterfront visits were the top activity (39%), followed by shopping (23%), culinary/dining experiences (21%) and typical restaurant dining (20%).

Activity (Multiple Response)	2019	2020	2021	Change '21/'20
Beach/Waterfront	46%	39%	39%	—
Shopping	28%	25%	23%	▼
Culinary/Dining Experience	30%	22%	21%	—
Culinary - Typical Restaurant Dining	-	-	20%	—
Visit Friends/Relatives	36%	32%	19%	▼
Theme/Amusement/Water Parks	16%	13%	12%	—
Touring/Sightseeing	16%	16%	11%	▼
Culinary - Special Dining Experience	-	-	8%	—
Boating/Sailing	4%	6%	7%	—
Parks (national/state, etc.)	13%	11%	7%	▼
Nightlife	12%	9%	7%	▼
Birthday	-	11%	6%	▼
Fishing	5%	5%	6%	—
Movies	7%	4%	5%	—
Bicycling	3%	7%	5%	▼
Hiking	3%	6%	5%	—
Festivals/Fairs (state, craft, etc.)	6%	8%	5%	▼
Live Music	9%	4%	5%	—
Historic Sites	10%	8%	5%	▼
Anniversary	-	4%	5%	—
Other Activities	2%	4%	5%	—
Museum, Art Exhibits, etc.	8%	7%	5%	▼
Golfing	5%	6%	5%	—
Business/Work	3%	8%	4%	▼
Wildlife Viewing	8%	7%	4%	▼
Holiday Celebration	6%	7%	4%	▼
Camping	2%	5%	3%	▼
Eco/Sustainable Travel	1%	3%	3%	—
Water Sports	5%	6%	3%	▼
Theater/Dance	3%	3%	3%	—
Amateur Sports (attend/participate)	3%	8%	2%	▼
Show: Boat, Car, Home	2%	6%	2%	▼

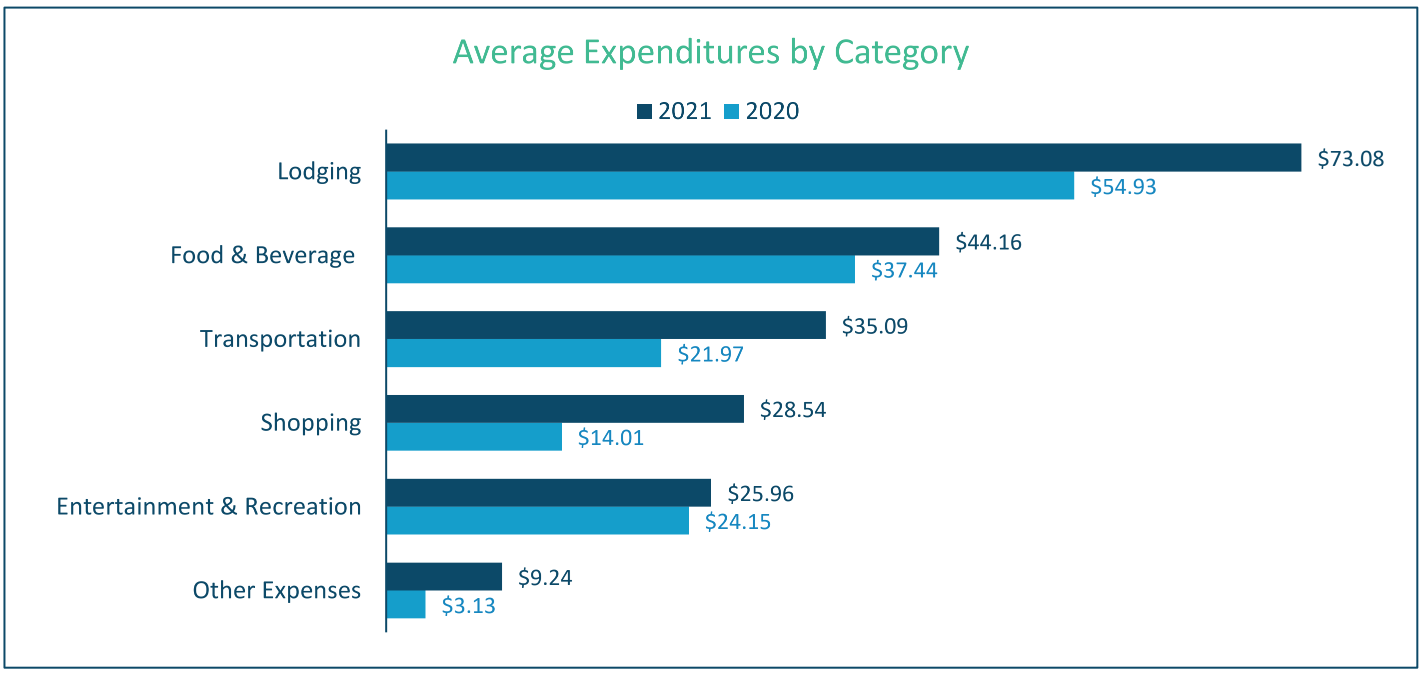
Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC VISITORS BY AUTOMOBILE (CONTINUED)

AVERAGE EXPENDITURES PER PERSON PER DAY

Average expenditures rose rapidly in 2021, rocketing up 36% to $189.97 per person per day (including transportation). While notable, it was below the growth rate observed for air visitors. Transportation expenditures grew 60%, pushed upward by high rental car costs which increased 95%. Lodging spend climbed 33%, thanks to a 27% increase in room costs and a 152% increase in services. Increased spend was also evident in smaller categories; shopping grew by 104%, food & beverage by 18%, and entertainment & recreation by 7%.

	2019	2020	2021	Change '21/'20
Avg. Expenditures (incl. transportation)	**$133.29**	**$139.88**	**$189.97**	**36%**
Avg. Expenditures (excl. transportation)	**$109.50**	**$116.99**	**$154.88**	**32%**
Lodging - Total	$56.03	$54.93	$73.08	33%
Lodging - Room	*$65.39*	*$57.19*	*$72.82*	*27%*
Lodging - Services (internet, parking, etc.)	*$7.33*	*$2.32*	*$5.85*	*152%*
Food & Beverage	$34.66	$37.44	$44.16	18%
Transportation - Total	$22.04	$21.97	$35.09	60%
Transportation - Rental Car	*$38.20*	*$41.90*	*$81.68*	*95%*
Transportation - Other (taxi, bus, gas, etc.)	*$15.19*	*$16.55*	*$20.15*	*22%*
Shopping	$17.07	$14.01	$28.54	104%
Entertainment & Recreation	$19.74	$24.15	$25.96	7%
Other Expenses	$3.21	$3.13	$9.24	195%



Source: D.K. Shifflet

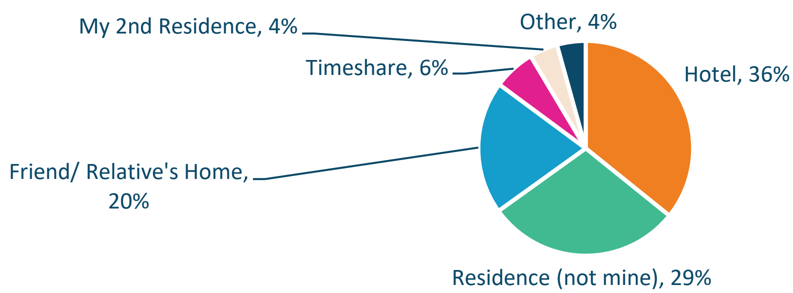
DOMESTIC VISITORS BY AUTOMOBILE (CONTINUED)

PAID VS. NON-PAID ACCOMMODATIONS

Eighty-two percent of drive visitors stayed in a paid accommodation in 2021. The share of visitors staying in non-hotel paid accommodations rose 7 percentage points to 46%, while the share staying in hotels fell 4 percentage points to 36%. Residences not owned by the traveler were the second most common accommodation after hotels, accounting for 29% of the total.

	2019	2020	2021	Change '21/'20
Paid	**66%**	**79%**	**82%**	▲
Hotel Paid	*36%*	*40%*	*36%*	▼
Non-Hotel Paid	*30%*	*39%*	*46%*	▲
Non-Paid	**34%**	**21%**	**18%**	▼

ACCOMMODATION TYPE



HOTEL LEVEL

Drive visitors who stayed in a hotel were significantly more likely to opt for a high-end hotel in 2021; the share staying in luxury properties rose 10 percentage points to 14%, while the share staying in an upscale property grew 9 percentage points to 23%.

	2019	2020	2021	Change '21/'20
High End	**30%**	**18%**	**37%**	▲
Luxury	6%	4%	14%	▲
Upscale	24%	14%	23%	▲
Mid-Level	**54%**	**58%**	**40%**	▼
Upper Moderate	20%	23%	15%	▼
Moderate	34%	35%	25%	▼
Economy	**16%**	**24%**	**24%**	—
Lower Moderate	9%	18%	10%	▼
Budget	7%	6%	14%	▲

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

DOMESTIC VISITORS BY AUTOMOBILE (CONTINUED)

LENGTH OF STAY

Average length of stay fell to 4.6 nights in 2021, down from 5.5 nights in 2020, but average stays were still longer than they had been in 2019. More than half (55%) of drive visitors had brief stays of 1 to 3 nights, while just over a third (34%) stayed 4 to 7 nights.

	2019	2020	2021	Change '21/'20
1-3 nights	56%	49%	55%	▲
4-7 nights	37%	38%	34%	▼
8+ nights	7%	13%	11%	▼
Average Nights in Florida	**4.0**	**5.5**	**4.6**	▼
Median Nights in Florida	**2.4**	**2.8**	**2.5**	▼

ACCOMMODATION RESERVATION TYPE

Online reservations reached a new level of popularity in 2021, with 63% of drive visitors booking accommodations online. Among online methods, hotel chain websites/apps were the most common (31%) followed by travel websites (16%). Non hotel accommodations websites/apps saw a significant increase in visitor share, rising 12 percentage points to 15%, reflecting the growth in popularity of short-term rentals. Direct bookings fell 11 percentage points to 18%.

	2019	2020	2021	Change '21/'20
Made Reservation	**92%**	**91%**	**88%**	▼
Online	48%	56%	63%	▲
Hotel Chain Website/App	*27%*	*33%*	*31%*	▼
Travel Website	*15%*	*19%*	*16%*	▼
Non Hotel Accommodations site/app	*6%*	*3%*	*15%*	▲
Other Website	*0.4%*	*0%*	*0.2%*	—
Called Directly	16%	29%	18%	▼
Travel Agent	1%	2%	3%	—
Other	27%	4%	4%	—
No Reservation	**8%**	**9%**	**12%**	▲

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

DOMESTIC VISITORS BY AUTOMOBILE (CONTINUED)

TRIP PLANNING TIME FRAME

Planning timeframes tended to be shorter in 2021 than in the previous two years. Nearly a quarter (23%) of drive visitors booked a week or less in advance of their trip, up from 16% in 2020. More than half (55%) of drive visitors planned their trip a month or less in advance in 2021, a notable increase from 43% in 2020 and 46% in 2019. Meanwhile, the share of visitors planning 6 months or more in advance dropped 4 percentage points from 2020 to 11%.

	2019	2020	2021	Change '21/'20
1 Week or Less	12%	16%	23%	▲
2-3 Weeks	16%	11%	13%	▲
1 Month	18%	15%	18%	▲
2-3 Months	26%	25%	20%	▼
4-5 Months	8%	10%	8%	▼
6 Months	7%	7%	6%	—
More Than 6 Months	12%	15%	11%	▼

TRIP PLANNING RESOURCES USED

Past experience (39%) was the most common resource that drive visitors used to plan their Florida trips in 2021, though it was used less frequently than it had been in 2020 (46%). Friends/family recommendations (18%) and internet searches (15%) were also less frequently used. In contrast, accommodations websites saw an increase in usage from 20% in 2020 to 23% in 2021.

	2019	2020	2021	Change '21/'20
Used Resource	**77%**	**76%**	**78%**	▲
Past Experience	33%	46%	39%	▼
Accommodations Websites	16%	20%	23%	▲
Friend/Family Recommendation	22%	27%	18%	▼
Internet Search (Google, Yahoo!, etc.)	18%	26%	15%	▼
Travel Booking Website (Expedia, etc.)	8%	13%	12%	—
Destination Websites/Apps	10%	10%	11%	—
Mapping Websites (Google Maps, etc.)	10%	21%	10%	▼
Attraction Websites/Apps	8%	9%	10%	—
Guest Ratings Websites (Yelp!, etc.)	10%	7%	8%	—
Destination Visitor Guides - Online	5%	9%	6%	▼
No Resource Used	**23%**	**24%**	**22%**	▼

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

DOMESTIC VISITORS BY AUTOMOBILE (CONTINUED)

AGE OF ADULT TRAVELERS

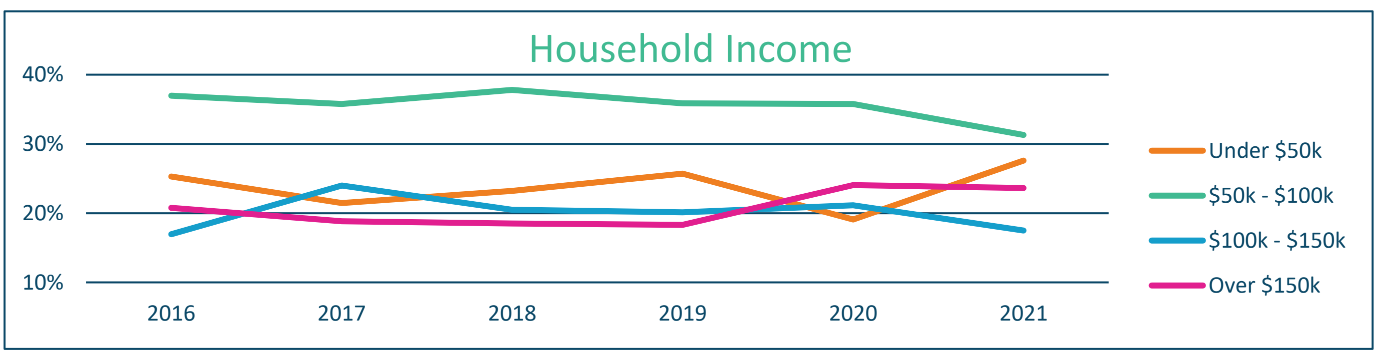
The median age of Florida's drive visitors fell to 49 years, down from 58 years in 2020. This brought the figure back in line with where it had been before the pandemic. The return of younger travelers led to a sharp increase in the share of visitors between the ages of 18 and 34, which rose from 6% in 2020 to 29% in 2021. Visitors over the age of 50 fell from 78% of the total to 50%.

	2019	2020	2021	Change '21/'20
18 - 34 Years Old	25%	6%	29%	▲
35 - 49 Years Old	25%	16%	22%	▲
50 - 64 Years Old	26%	41%	27%	▼
65+ Years Old	24%	37%	22%	▼
Average Age	**49.8**	**58.0**	**48.5**	▼
Median Age	**49**	**58**	**49**	▼

HOUSEHOLD INCOME

The median household income of drive visitors declined alongside median age, falling 9% to $85,344 in 2021. A sharp increase in the share of visitors earning less than $35,000 was a contributing factor, as it climbed from 12% in 2020 to 21% in 2021.

	2019	2020	2021	Change '21/'20
Under $35,000	15%	12%	21%	▲
$35,000 - $49,999	11%	7%	6%	—
$50,000 - $74,999	19%	16%	16%	—
$75,000 - $99,999	17%	20%	16%	▼
$100,000 - $149,999	20%	21%	18%	▼
$150,000 - $199,999	13%	18%	14%	▼
$200,000+	5%	6%	10%	▲
Average	**$98,284**	**$108,350**	**$107,180**	-1%
Median	**$83,646**	**$93,947**	**$85,344**	-9%



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

DOMESTIC VISITORS BY AUTOMOBILE (CONTINUED)

GENERATION

The two youngest generational cohorts returned in droves in 2021. Millennial/Gen Z travelers were slow to return after the onset of the pandemic in 2020, and their share consequently fell 18 percentage points from 2019 to 12%. But, in 2021, their share climbed to 38%, surpassing their pre-pandemic level. Boomers saw a notable decline, dropping from 53% in 2020 to 35%.

	2019	2020	2021	Change '21/'20
Millennials/Gen Z (1981 or later)	30%	12%	38%	▲
GenX (1965-1980)	28%	27%	24%	▼
Boomers (1946 -1964)	35%	53%	35%	▼
Silent/GI (1945 or earlier)	7%	8%	3%	▼

LIFESTAGE

Drive visitors in family lifestages accounted for nearly one-third (32%) of the total in 2021, recovering the visitor share they had lost in 2020 (17%). Young families saw a particularly strong rebound, adding 12 percentage points in share to reach 14%. Young & Free travelers also saw a notable increase, adding 10 percentage points to reach 15%. A majority (53%) of drive visitors were in mature lifestages in 2021, down from 78% in 2020.

	2019	2020	2021	Change '21/'20
Young & Free (18-34; any income; no kids)	16%	5%	15%	▲
Young Family (18-34; any income; kids in HH)	12%	2%	14%	▲
Maturing & Free (35-54; any income; no kids)	15%	20%	12%	▼
Moderate Family (35-54; <$75K; kids in HH)	6%	1%	5%	▲
Affluent Family (35-54; $75K+; kids in HH)	14%	13%	13%	—
Moderate Mature (55 or older, <$100K; no kids)	21%	32%	24%	▼
Affluent Mature (55 or older; $100K+, no kids)	16%	26%	18%	▼

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:

> Florida's domestic visitors were less likely to be traveling for leisure in 2021 than they had been the previous year. Eighty-seven percent were leisure visitors, down from 93% in 2020 but mostly unchanged from 86% in 2019.

> Georgia was the top origin state for leisure visitors in 2021, accounting for 9.9% of the total. New York (8.8%), Alabama (6.9%). Texas (6.2%), and Pennsylvania (5.2%) were the remainder of the top 5. Indiana's visitor share grew significantly, rising from 1.6% in 2020 to 5.1% in 2021. Illinois saw its share fall from 8.0% to 4.5%, dropping the Land of Lincoln from second place to eighth.

> The top destination region for leisure visitors in 2021 was the Central region. Thirty-seven percent of visitors traveled there, up from 28% in 2020 and 32% in 2019. Following the Central region were the Southeast (20%), Central West (11%), and Northwest (9%) regions. The Southwest region lost 6 percentage points in visitor share, sliding down to 8%.

> More than half (52%) of leisure visitors traveled to Florida for a general vacation, down from 2020 (54%) but notably higher than in pre-pandemic 2019 (47%). Visiting friends/relatives accounted for a similar share to the previous year (22%), while getaway weekends (11%) and special events (9%) saw a combined increase of 6 percentage points.

> Average party size declined slightly to 2.1 people in 2021, down from 2.2 in 2020. An increase in the share of adult solo travelers was the primary culprit, as it rose from 27% to 35%. Family travel parties also increased in share, rebounding from 11% to reach 16% in 2021, though it remained below its pre-pandemic share by 3 percentage points.

> The shift toward non-hotel paid accommodations continued in 2021, as 42% of leisure visitors opted to stay in one compared to 38% in 2020 and 30% in 2019. A slightly smaller share (40%) chose a hotel. The share staying in non-paid accommodations fell 6 percentage points to 19%, likely attributable to a decrease in the share of visitors staying in the homes of friends and relatives.

> Participation declined across a range of historically popular activities in 2021, extending a trend that began with the onset of the pandemic the previous year. Beach/waterfront activities remained the most popular, though the share engaging

in them fell 4 percentage points to 37%. Shopping (24%), typical restaurant dining (23%), and culinary/dining experiences (22%) were also popular. The share that visited a friend or relative fell to 21%, down from 34% in 2020. Several outdoor activities that increased in popularity in 2020 also saw declining participation, including hiking (4%), golfing (4%), and wildlife viewing (3%).

> The average length of stay fell to 4.8 nights in 2021, down from 5.5 nights in 2020. The shorter length of stay was attributable to a 4 percentage point increase in the share of visitors staying 1 to 3 nights (52%) alongside a 3 percentage point decrease in the share staying 8 or more nights (12%).

> Average expenditures jumped by 34% to $218.89 in 2021, vastly exceeding the rate of inflation.

> Domestic leisure visitors tended to be younger on average in 2021 than they had been in 2020. The median age fell to 49 years, down from 57 a year earlier. The combined share of travelers belonging to the Gen Z and Millennial cohorts climbed to 36% from 18% in 2020. Boomers remained the largest generation cohort among Florida visitors, though its share fell 12 percentage points to 36%.

DOMESTIC LEISURE VISITORS

PRIMARY PURPOSE OF TRIP

Florida's domestic leisure visitors came primarily for general vacations in 2021 which accounted for 52% of the total. Visiting friend/relatives came in at 22%, though this was down from 27% in pre-pandemic 2019. Getaway weekends (11%) and special events (9%) both gained in visitor share from the previous year, as travel arrangements were less challenging than in 2020.

	2019	2020	2021	Change '21/'20
General Vacation	47%	54%	52%	▼
Visit Friends/Relatives	27%	23%	22%	—
Getaway Weekend	11%	9%	11%	▲
Special Event	8%	5%	9%	▲
Other Leisure/Personal	7%	8%	6%	▼

TRANSPORTATION TYPE

The ratio of air to non-air travelers among leisure visitors was unchanged from the previous year in 2021 (27.6%). This was a significantly smaller share compared to 2019 (33.8%).

	2019	2020	2021	Change '21/'20
Air	33.8%	27.6%	27.6%	—
Non-Air	66.2%	72.4%	72.4%	—

SEASONALITY

With travel becoming more routine in 2021 after profound disruption in 2020, seasonality resembled pre-pandemic 2019. Just under a quarter (24%) of visitors came in Winter, down from 54% in 2020. Summer was the most popular month; it accounted for 31% of visitors.

	2019	2020	2021	Change '21/'20
Winter (Dec, Jan, Feb)	26%	54%	24%	▼
Spring (Mar, Apr, May)	25%	16%	24%	▲
Summer (Jun, Jul, Aug)	28%	14%	31%	▲
Fall (Sept, Oct, Nov)	20%	15%	20%	▲

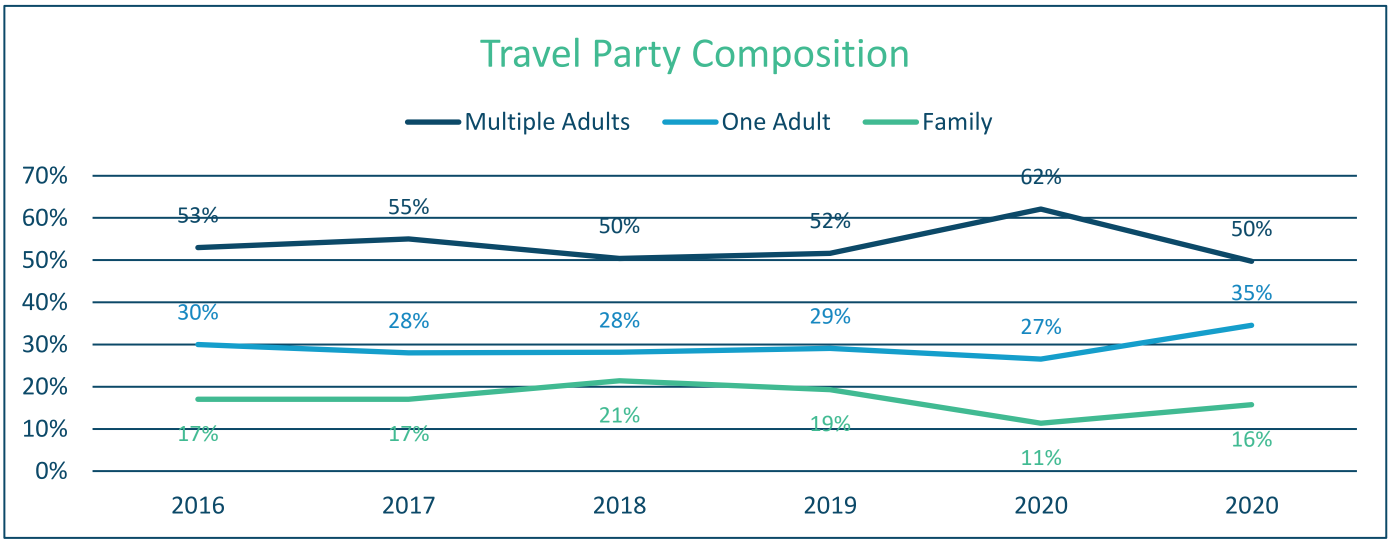
Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC LEISURE VISITORS (CONTINUED)

TRAVEL PARTY COMPOSITION

Single adult travel parties were more common in 2021 than they had been a year earlier, with the increase in visitor share contributing to a decline in average party size.

	2019	2020	2021	Change '21/'20
One Male and One Female	41%	51%	39%	▼
One Adult	29%	27%	35%	▲
Families	19%	11%	16%	▲
Three or More Adults	6%	6%	6%	—
Two Males or Two Females	5%	5%	4%	—
Average Party Size	**2.2**	**2.2**	**2.1**	▼



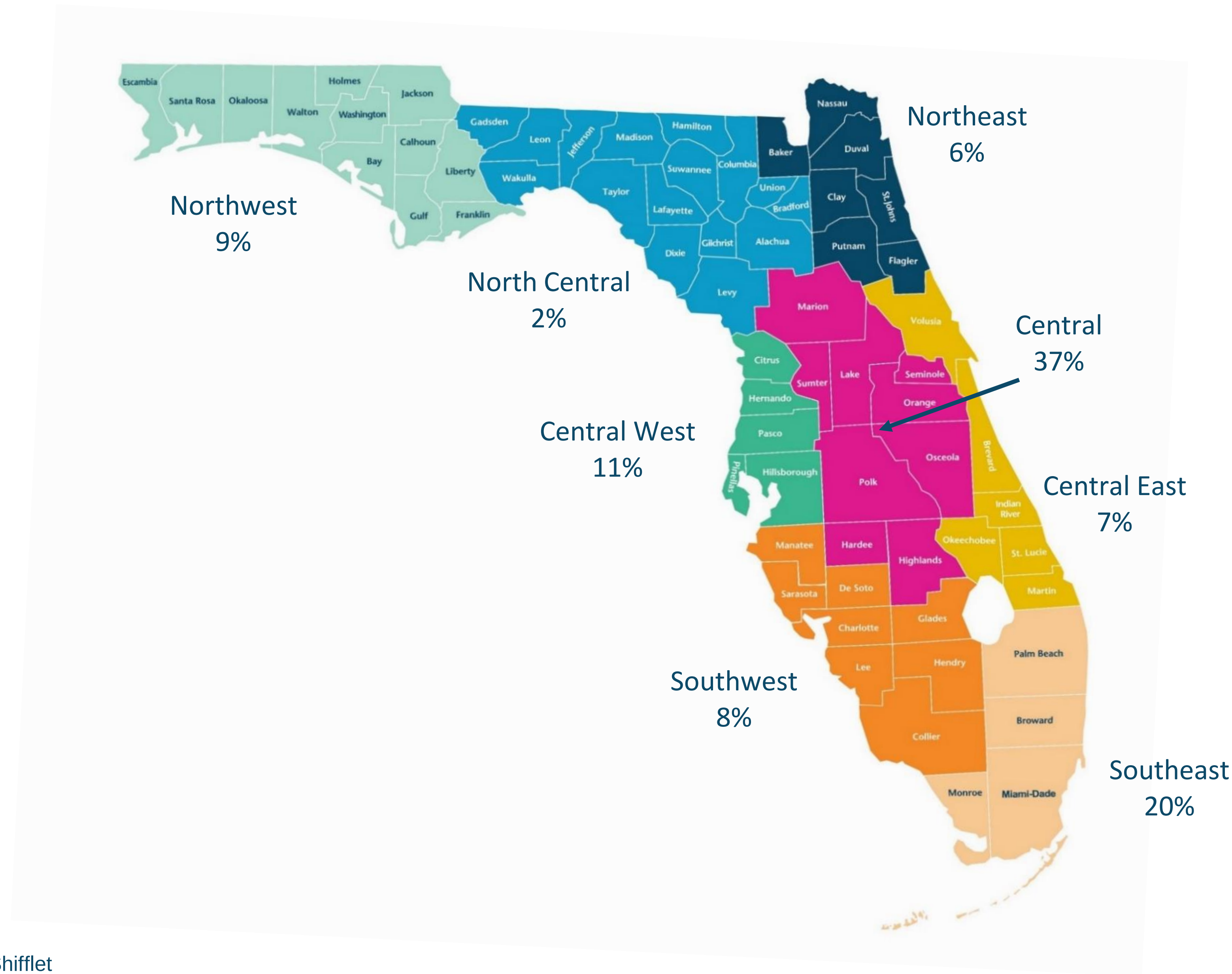
FLORIDA DESTINATION REGIONS

	2019	2020	2021	Change '21/'20
Central	32%	28%	37%	▲
Southeast	20%	19%	20%	—
Central West	12%	14%	11%	▼
Northwest	11%	10%	9%	—
Southwest	9%	14%	8%	▼
Central East	9%	6%	7%	—
Northeast	6%	7%	6%	—
North Central	2%	2%	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

Georgia climbed back to first place among origin states for leisure visitors in 2021 after falling to fourth the previous year. The Peach State accounted for 9.9% of leisure visitors, up from 7.0% in 2020 and 9.5% in 2019. Seventh-place Indiana also saw notable growth, as its visitor share grew from 1.6% in 2020 to 5.1%. Meanwhile, Illinois saw its share nearly cut in half, dropping from 8.0% in 2020 to 4.5% in 2021.

Rank	State	2019	2020	2021	Change '21/'20
1	Georgia	9.5%	7.0%	9.9%	▲
2	New York	10.2%	9.6%	8.8%	▼
3	Alabama	3.1%	7.9%	6.9%	▼
4	Texas	5.6%	4.1%	6.2%	▲
5	Pennsylvania	5.1%	4.5%	5.2%	▲
6	Ohio	5.5%	4.0%	5.2%	▲
7	Indiana	3.5%	1.6%	5.1%	▲
8	Illinois	4.1%	8.0%	4.5%	▼
9	Michigan	3.9%	3.3%	4.1%	▲
10	Tennessee	4.1%	3.9%	4.0%	—

TOP ORIGIN DESIGNATED MARKET AREAS (DMAs)

New York City held on to its spot as the top-ranked DMA in 2021, though its share of leisure visitors fell from 10.6% in 2020 to 9.3%. Atlanta (5.7%), Chicago (5.0%), Birmingham (4.9%), and Philadelphia (3.1%) rounded out the top five. As a drive market, Birmingham was better positioned to recover early in the pandemic, and as a consequence it gained in visitor share in both 2020 and 2021. Dallas-Fort Worth, the fourth largest metropolitan area in the U.S. and market of opportunity for Florida, rose in share from 1.6% in 2020 to 2.2% in 2021.

Rank	DMA	2019	2020	2021	Change '21/'20
1	New York, NY	10.5%	10.6%	9.3%	▼
2	Atlanta, GA	7.4%	6.0%	5.7%	—
3	Chicago, IL	3.7%	4.8%	5.0%	—
4	Birmingham, AL	1.5%	3.0%	4.9%	▲
5	Philadelphia, PA	3.5%	3.1%	3.1%	—
6	Boston, MA	3.0%	3.1%	2.7%	—
7	Washington, DC	2.8%	2.8%	2.4%	—
8	Dallas-Fort Worth, TX	1.9%	1.6%	2.2%	▲
9	Minneapolis-St. Paul, MN	1.0%	1.7%	1.6%	—
10	Detroit, MI	2.0%	1.9%	1.5%	—

Note: The Origin DMA data combines two years of data for each year shown to obtain a larger sample size, where 2021 figures are based on CY 2021-2020 data, 2020 figures are based on CY 2020-2019 data, etc.

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

DOMESTIC LEISURE VISITORS (CONTINUED)

ACTIVITIES DURING TRIP

Among Florida's leisure visitors, participation in many top acitivities fell for a second consecutive year. Beach/waterfront activities declined 4 percentage points to 37% in 2021, while shopping fell 3 percentage points to 24%. Visiting friends/relatives saw a particularly large drop, slipping 13 percentage points to 21%.

Activity (Multiple Response)	2019	2020	2021	Change '21/'20
Beach/Waterfront	47%	41%	37%	▼
Shopping	31%	27%	24%	▼
Culinary - Typical Restaurant Dining	-	-	23%	—
Culinary/Dining Experience	32%	25%	22%	▼
Visit Friends/Relatives	37%	34%	21%	▼
Theme/Amusement/Water Parks	18%	14%	14%	—
Touring/Sightseeing	17%	16%	11%	▼
Culinary - Special Dining Experience	-	-	9%	—
Birthday	-	12%	8%	▼
Boating/Sailing	4%	7%	7%	—
Parks (national/state, etc.)	13%	11%	7%	▼
Nightlife (bar, nightclub, etc.)	14%	10%	7%	▼
Fishing	4%	7%	6%	—
Bicycling	3%	7%	6%	—
Movies	7%	5%	5%	—
Anniversary	-	5%	5%	—
Live Music	10%	6%	5%	—
Festivals/Fairs (state, craft, etc.)	6%	8%	5%	▼
Hiking	3%	7%	4%	▼
Historic Sites	9%	10%	4%	▼
Museum, Art Exhibits, etc.	7%	8%	4%	▼
Holiday Celebration (Thanksgiving, etc.)	5%	8%	4%	▼
Golfing	5%	8%	4%	▼
Other Activities	1%	4%	4%	—
Wildlife Viewing	7%	8%	3%	▼
Water Sports	4%	6%	3%	▼
Camping	1%	5%	3%	▼
Gambling (slots, cards, horses, etc.)	3%	6%	3%	▼
Spa / Wellness	2%	4%	2%	▼
Eco/Sustainable Travel	1%	4%	2%	▼
Business/Work	1%	5%	2%	▼

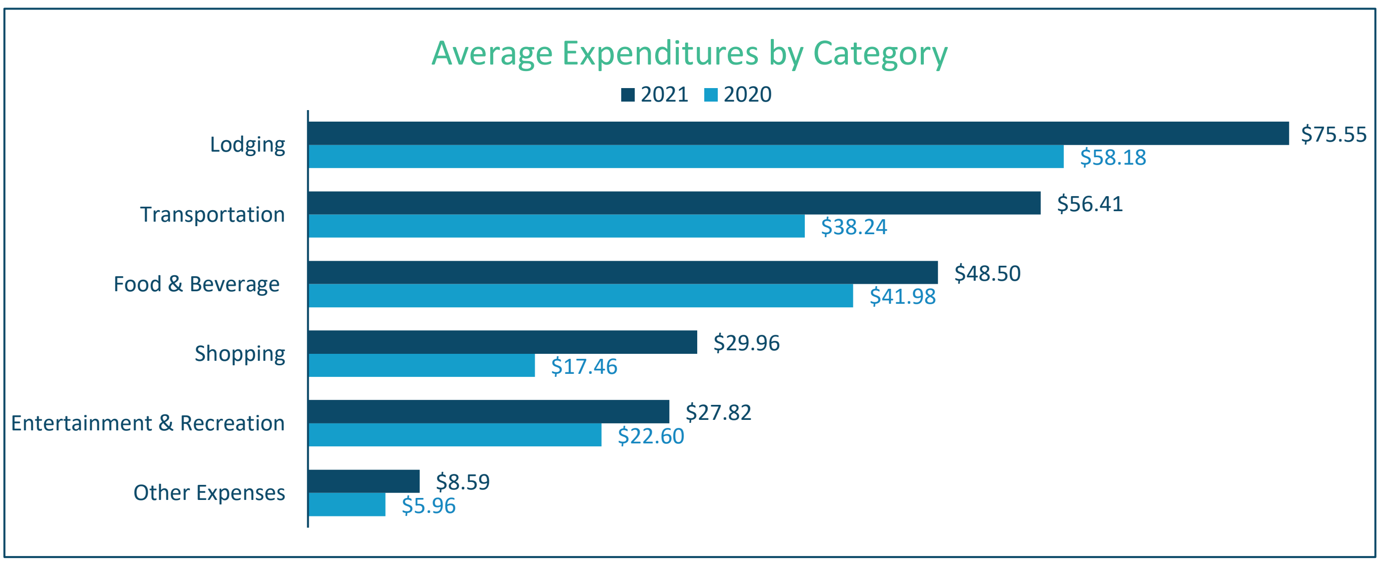
Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC LEISURE VISITORS (CONTINUED)

AVERAGE EXPENDITURES PER PERSON PER DAY

Leisure visitors increased their spending at a rapid pace in 2021. Average per person per day expenditures (including transportation) reached $218.89, up 34% year over year. Transportation expenditures climbed by 48%, driven by a 68% increase in airfares and a 72% increase in spending on rental cars. Lodging expenditures rose by 30%, with a 27% increase in spending on rooms and a 135% increase in spending on services. Shopping expenditures spiked by 72%, while entertainment & recreation expenditures grew 23%.

	2019	2020	2021	Change '21/'20
Avg. Expenditures (incl. transportation)	**$155.31**	**$163.65**	**$218.89**	**34%**
Avg. Expenditures (excl. transportation)	**$114.74**	**$125.41**	**$162.51**	**30%**
Lodging - Total	$61.89	$58.18	$75.55	30%
Lodging - Room	*$72.26*	*$59.91*	*$76.21*	*27%*
Lodging - Services (internet, parking, etc.)	*$11.52*	*$2.43*	*$5.72*	*135%*
Transportation - Total	$40.57	$38.24	$56.41	48%
Transportation - Total (excluding airfare)	*$21.30*	*$23.47*	*$34.26*	*46%*
Transportation - Airfare	*$50.78*	*$44.91*	*$75.29*	*68%*
Transportation - Rental Car	*$37.24*	*$40.71*	*$70.22*	*72%*
Transportation - Other (taxi, bus, gas, etc.)	*$11.67*	*$14.77*	*$17.66*	*20%*
Food & Beverage	$37.04	$41.98	$48.50	16%
Shopping	$17.99	$17.46	$29.96	72%
Entertainment & Recreation	$19.75	$22.60	$27.82	23%
Other Expenses	$3.85	$5.96	$8.59	44%



Source: D.K. Shifflet

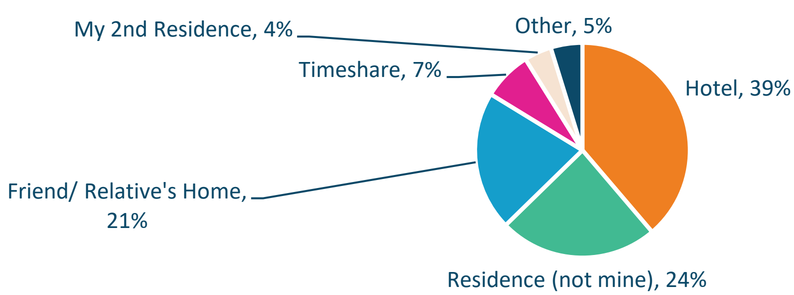
DOMESTIC LEISURE VISITORS (CONTINUED)

PAID VS. NON-PAID ACCOMMODATIONS

Leisure visitors were more likely to stay in a paid accommodation in 2021 compared to 2020. The share staying in a paid hotel room rose 3 percentage points, while the share staying in non-hotel paid accomodations rose 4 percentage points to 42%. The decline in non-paid accommodations reflects a decrease in the share staying with friends/relatives.

	2019	2020	2021	Change '21/'20
Paid	**67%**	**75%**	**81%**	▲
Hotel Paid	*37%*	*37%*	*40%*	▲
Non-Hotel Paid	*30%*	*38%*	*42%*	▲
Non-Paid	**33%**	**25%**	**19%**	▼

ACCOMMODATION TYPE



HOTEL LEVEL

Leisure visitors who chose to stay in hotels were much more likely to select a high-end property in 2021 than during the previous year. Mid-level hotels saw their visitor share drop from 50% in 2020 to 37% in 2021.

	2019	2020	2021	Change '21/'20
High End	**39%**	**27%**	**43%**	▲
Luxury	10%	8%	17%	▲
Upscale	29%	20%	26%	▲
Mid-Level	**48%**	**50%**	**37%**	▼
Upper Moderate	19%	18%	14%	▼
Moderate	29%	32%	23%	▼
Economy	**13%**	**23%**	**22%**	—
Lower Moderate	8%	17%	10%	▼
Budget	5%	5%	12%	▲

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

DOMESTIC LEISURE VISITORS (CONTINUED)

LENGTH OF STAY

Leisure visitors stayed longer in 2021 than they had pre-pandemic, with an average length of stay at 4.8 nights compared to 4.2 nights in 2019. A 4 percentage point increase in the share of visitors staying 8 or more nights was likely a key contributor with longer stays enabled by remote work and remote schooling during the pandemic.

	2019	2020	2021	Change '21/'20
1-3 nights	50%	48%	52%	▲
4-7 nights	42%	37%	37%	—
8+ nights	8%	15%	12%	▼
Average Nights in Florida	**4.2**	**5.5**	**4.8**	▼
Median Nights in Florida	**2.9**	**3.1**	**2.7**	▼

ACCOMMODATION RESERVATION TYPE

The share of leisure visitors booking online reached nearly two-thirds (65%) in 2021, marking a second consecutive year of growth. The increase was attributable to a steep rise in the share booking through a non hotel-accommodations website or app, which climbed 11 percentage points to 16% in 2021. About 4% booked with travel agents, up from 2% in 2019.

	2019	2020	2021	Change '21/'20
Made Reservation	**93%**	**92%**	**89%**	▼
Online	46%	57%	65%	▲
Hotel Chain Website/App	*27%*	*34%*	*34%*	—
Travel Website	*13%*	*19%*	*14%*	▼
Non Hotel Accommodations site/app	*5%*	*4%*	*16%*	▲
Other Website	*1%*	*0%*	*0.3%*	—
Called Directly	20%	27%	17%	▼
Travel Agent	2%	4%	4%	—
Other	26%	4%	4%	—
No Reservation	**7%**	**8%**	**11%**	▲

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

DOMESTIC LEISURE VISITORS (CONTINUED)

TRIP PLANNING TIME FRAME

A trend toward shorter booking timeframes continued through 2020 and into 2021. More than half (52%) of leisure visitors booked their trip a month or less in advance in 2021, up from 43% in 2020 and 41% in 2019. The share booking more than 6 months in advance fell over the same period, declining 3 percentage points from 2020 to 11% in 2021.

	2019	2020	2021	Change '21/'20
1 Week or Less	9%	13%	20%	▲
2-3 Weeks	13%	13%	12%	—
1 Month	18%	17%	19%	▲
2-3 Months	29%	26%	23%	▼
4-5 Months	10%	10%	9%	—
6 Months	8%	7%	6%	—
More Than 6 Months	12%	14%	11%	▼

TRIP PLANNING RESOURCES USED

The share of leisure visitors using one or more resources to plan their trip grew to 79% in 2021, up from 73% in 2020. Past experience was the most frequently used resource (39%), though its usage dropped 9 percentage points from the previous year. While many resources declined in useage in 2021, accommodations websites/apps grew from 19% in 2020 to 24%.

	2019	2020	2021	Change '21/'20
Used Resource	**80%**	**73%**	**79%**	▲
Past Experience	35%	48%	39%	▼
Accommodations websites/apps	16%	19%	24%	▲
Friend/Family Recommendation	22%	25%	20%	▼
Internet Search (Bing, Google etc.)	18%	23%	16%	▼
Destination Websites	10%	11%	12%	—
Travel Booking Website (Expedia, etc.)	9%	15%	12%	▼
Attraction Websites	9%	10%	11%	—
Mapping Websites (Google Maps, etc.)	8%	16%	9%	▼
Review Websites (TripAdvisor, Yelp!, etc.)	9%	8%	8%	—
Social Networking Sites (Facebook, etc.)	5%	3%	7%	▲
No Resource Used	**20%**	**27%**	**21%**	▼

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

DOMESTIC LEISURE VISITORS (CONTINUED)

AGE OF ADULT TRAVELERS

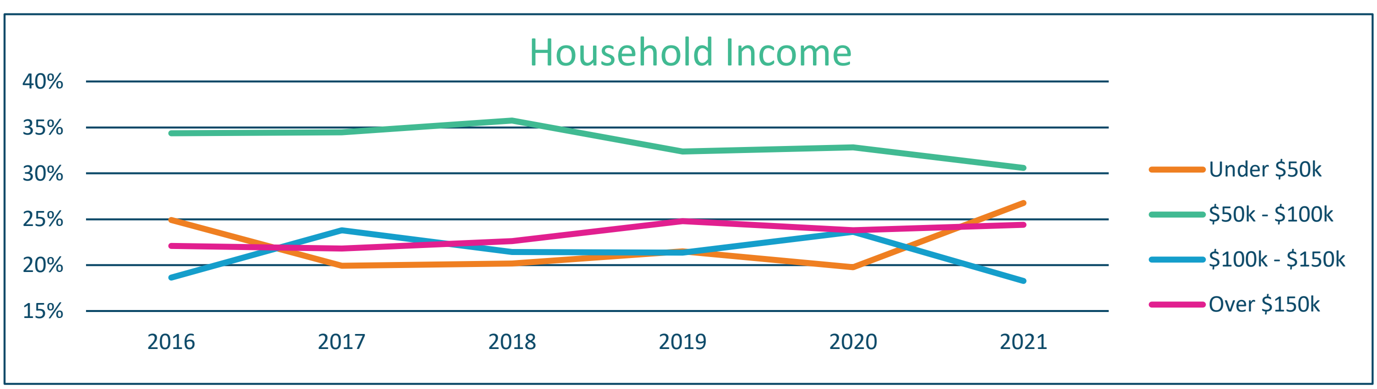
Florida's leisure visitors were significantly younger on average in 2021, dropping to 49 years from 56 years in 2020. Why? Travelers under 50 returned in substantial numbers after having been slow to resume travel early in the pandemic. The share of travelers between the ages of 18 and 49 grew 22 percentage points from the previous year to 50%.

	2019	2020	2021	Change '21/'20
18 - 34 Years Old	23%	12%	26%	▲
35 - 49 Years Old	27%	16%	23%	▲
50 - 64 Years Old	28%	38%	28%	▼
65+ Years Old	22%	34%	23%	▼
Average Age	**49.7**	**55.9**	**49.0**	▼
Median Age	**49**	**57**	**49**	▼

HOUSEHOLD INCOME

Leisure visitors had a median household income of $87,452 in 2021, down -9% from 2020. The share of visitors earning less than $35,000 grew 6 percentage points to 19%.

	2019	2020	2021	Change '21/'20
Under $35,000	12%	13%	19%	▲
$35,000 - $49,999	10%	7%	8%	—
$50,000 - $74,999	16%	15%	16%	—
$75,000 - $99,999	16%	18%	15%	▼
$100,000 - $149,999	21%	24%	18%	▼
$150,000 - $199,999	15%	16%	15%	—
$200,000+	9%	8%	10%	▲
Average	**$113,783**	**$111,329**	**$108,981**	-2%
Median	**$94,410**	**$96,479**	**$87,452**	-9%



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

DOMESTIC LEISURE VISITORS (CONTINUED)

GENERATION

The Millennial and Gen Z cohorts accounted for more than one-third (36%) of leisure visitors in 2021, up from 18% in 2020 and 29% in 2019. Boomers dropped from 48% in 2020 to 36%, a share comparable to 2019. The Silent and G.I. generations fell by more than half to 3%.

	2019	2020	2021	Change '21/'20
Millennials/Gen Z (1981 or later)	29%	18%	36%	▲
GenX (1965-1980)	30%	26%	25%	—
Boomers (1946 -1964)	35%	48%	36%	▼
Silent/GI (1945 or earlier)	6%	8%	3%	▼

LIFESTAGE

Visitors in the Young & Free and Young Family lifestages made up nearly 30% of leisure visitors, a notable improvement from 14% the previous year. Family lifestages recovered much of the visitor share they had lost in 2020, growing 15 percentage points to 32% comparable to their share of 34% in 2019. The Mature lifestages accounted for 54% of visitors in 2021, down from 72% but slightly higher than in 2019 (52%).

	2019	2020	2021	Change '21/'20
Young & Free (18-34; any income; no kids)	15%	11%	14%	▲
Young Family (18-34; any income; kids in HH)	10%	3%	14%	▲
Maturing & Free (35-54; any income; no kids)	15%	18%	13%	▼
Moderate Family (35-54; <$75K; kids in HH)	5%	1%	6%	▲
Affluent Family (35-54; $75K+; kids in HH)	18%	13%	13%	—
Moderate Mature (55 or older, <$100K; no kids)	19%	30%	23%	▼
Affluent Mature (55 or older; $100K+, no kids)	18%	24%	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:

> The share of Florida's domestic visitors that traveled to the Sunshine State for business nearly doubled in 2021 to reach 13%, up from 7% in 2020; this put it closer in line with the 15% observed in 2019.

> Business visitors were significantly less likely to travel to Florida by air in 2021. The share of business visitors traveling by air fell to 27.2% from 40.0% in 2020, as air travel continued to be hampered by the pandemic.

> A third (33%) of business visitors traveled to Central Florida in 2021, down from 45% in pre-pandemic 2019. The second most common destination was Southeast Florida (21%), which fell 12 percentage points in share from the previous year but was still above its 16% share in 2019. The Central West (19%), Southwest (8%), and Northeast (8%) regions rounded out the top 5; each held larger shares than before the pandemic.

> Transient business (44%) was the most common trip purpose that brought business visitors to Florida in 2021. Seminars/trainings (22%) and conventions (17%), and other group meetings (17%) declined in year-over-year combined share as a result of pandemic-related delays and cancellations.

> Florida's business visitors saw an increase in average party size in 2021, rising to 1.8 from 1.4 in 2020 and pre-pandemic 2019. The growth was attributable to a substantial increase in the share of multiple adult parties (28%) and families (14%).

> After business/work (29%), the top activity for business visitors in 2021 was visiting the beach/waterfront (25%); visits to the water saw a significant rebound after falling to 7% in 2020 from 22% in 2019. Other popular activities included culinary/dining experiences (16%), shopping (13%), and golfing (10%). Amateur sports decreased notably in popularity from 2020, dropping 14 percentage points to 7%.

> Business visitors stayed an average of 2.5 nights in 2021, down from 2.6 nights in 2020 and 3.1 nights in 2019. The decrease was the result of an increase in the share of visitors staying 1 to 3 nights, which rose 2 percentage points to 77%.

> Business travelers spent less on average per person per day in 2021 compared to 2020, but expenditures were still considerably higher than before the pandemic.

Average expenditures (including transportation) fell -2% from 2020 to $406.62, but were up 40% from 2019. The slight decrease in spend from the previous year was largely attributable to lower spend in a few key categories: transportation (-35%), lodging (-20%), and food & beverage (-8%). Entertainment & recreation (+214%) and shopping (+195%), however, both saw appreciable increases in spend.

> Non-hotel paid accommodations saw a second year of increasing popularity among business visitors, more than tripling in visitor share from 11% in 2019 to 34% 2021. A pandemic-era preference for the privacy of short-term accommodations like whole home rentals contributed to this trend. Further evidence for this trend: the share of visitors staying in a private home they did not own rose from 5% in 2019 to 19% in 2021. As for hotels, upscale (27%) and upper moderate (23%) properties lost visitor share, likely due to delays and cancellations related to the pandemic.

> Median household income dropped significantly in 2021, falling 24% to $119,427. This was primarily the result of a 13 percentage point decline in the share of visitors earning $150,000 or more per year (31%).

> Business visitors tended to be younger in 2021, with median age at 37 years compared to 40 in 2020 and 43 in 2019. A 24 percentage point increase in the share of visitors between the ages of 18 and 34 was the culprit behind the shift. Millennial and Gen Z travelers accounted for nearly two-thirds (63%) of business visitors in 2021, up from 46% a year earlier. With business visitors skewing younger, the share in family lifestages rose 18 percentage points to 55%.

DOMESTIC BUSINESS VISITORS

PRIMARY PURPOSE OF TRIP

Transient business was the most common reason that business travelers had for venturing to Florida in 2021, likely reflecting a decline in travel to meetings, conventions, and other events as many were either cancelled or delayed due to the pandemic.

	2019	2020	2021	Change '21/'20
Transient Business	38%	30%	44%	▲
Seminar/Training	20%	31%	22%	▼
Convention	26%	27%	17%	▼
Other Group Meetings	16%	12%	17%	▲

TRANSPORTATION TYPE

The pandemic led to a significant decrease in the share of business visitors traveling by air, which dropped from 67.5% in 2019 to 27.2% in 2021.

	2019	2020	2021	Change '21/'20
Air	67.5%	40.0%	27.2%	▼
Non-Air	32.5%	60.0%	72.8%	▲

SEASONALITY

The seasonality of business travel began to resemble pre-pandemic patterns in 2021, with Winter being the slowest season (16%). Fall was the busiest season, accounting for a 30% share of business visitors, down from 40% in 2020 but above the 23% share in 2019. Summer regained a share of 28%, comparable to its share pre-pandemic and a significant recovery from 8% in 2020.

	2019	2020	2021	Change '21/'20
Winter (Dec, Jan, Feb)	19%	39%	16%	▼
Spring (Mar, Apr, May)	32%	14%	26%	▲
Summer (Jun, Jul, Aug)	27%	8%	28%	▲
Fall (Sept, Oct, Nov)	23%	40%	30%	▼

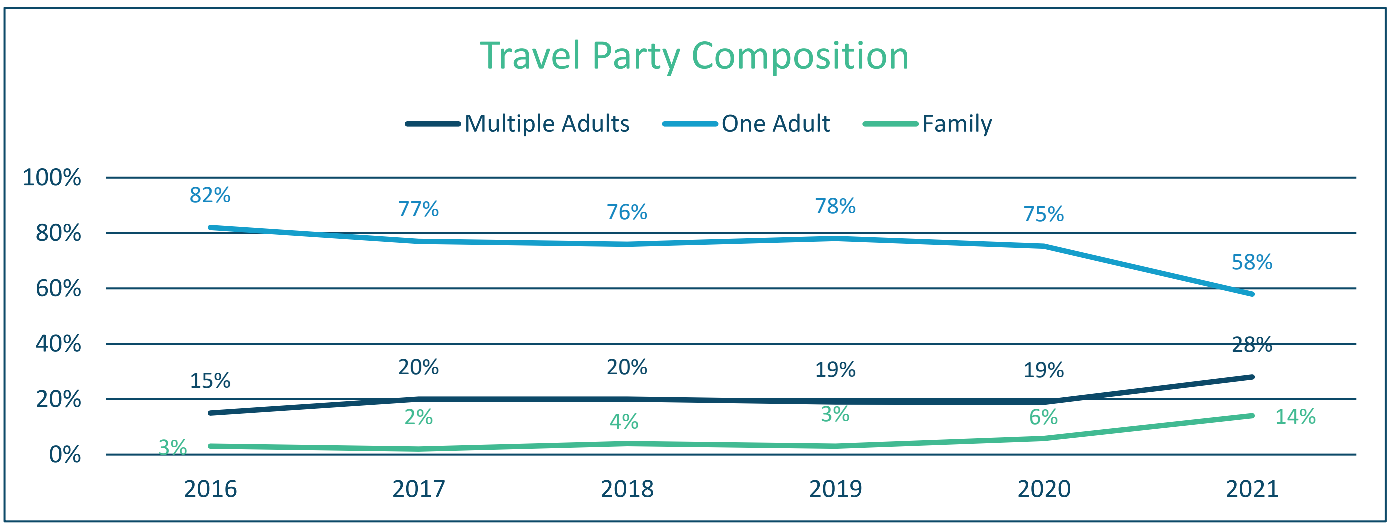
Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC BUSINESS VISITORS (CONTINUED)

TRAVEL PARTY COMPOSITION

Average party size rose to 1.8 people in 2021, up notably from 1.4 in 2020. Multiple adult travel parties gained 9 percentage points in visitor share, while families gained 8 percentage points. Solo travel declined 17 percentage points to 58%, likely reflecting a pandemic-induced shift toward remote work and bleisure trips that often include family and friends.

	2019	2020	2021	Change '21/'20
One Adult	78%	75%	58%	▼
One Male and One Female	11%	10%	21%	▲
Families	3%	6%	14%	▲
Three or More Adults	4%	2%	4%	▲
Two Males or Two Females	5%	7%	3%	▼
Average Party Size	**1.4**	**1.4**	**1.8**	▲



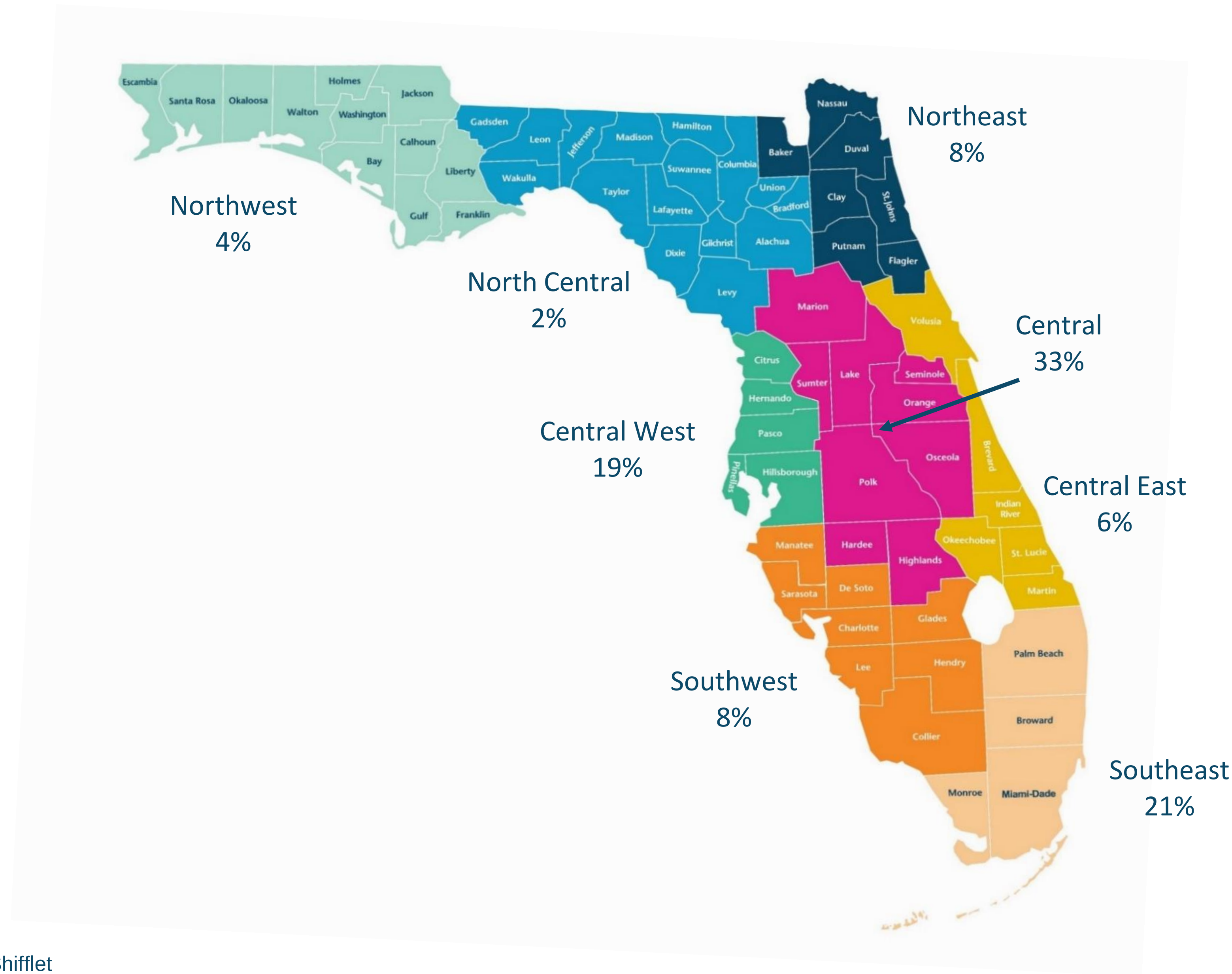
FLORIDA DESTINATION REGIONS

	2019	2020	2021	Change '21/'20
Central	45%	31%	33%	▲
Southeast	16%	33%	21%	▼
Central West	17%	18%	19%	—
Southwest	6%	3%	8%	▲
Northeast	5%	3%	8%	▲
Central East	3%	2%	6%	▲
Northwest	5%	9%	4%	▼
North Central	3%	2%	2%	—

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

New York was the top origin state for business visitors in 2021, with a 12.7% share of the total. This was a 3 percentage point increase from 2020, and a 6 percentage point increase from 2019. California slid from the top spot in 2020 to second place with an 8.5% share. Georgia (6.7%), Texas (6.7%), and Ohio (5.3%) rounded out the top 5, though only Ohio saw an increase in share from the previous year.

Rank	State	2019	2020	2021	Change '21/'20
1	New York	6.8%	9.7%	12.7%	▲
2	California	6.1%	14.7%	8.5%	▼
3	Georgia	7.5%	8.9%	6.7%	▼
4	Texas	5.2%	9.6%	6.7%	▼
5	Ohio	4.6%	2.7%	5.3%	▲
6	Indiana*	2.5%	3.1%	5.1%	▲
7	South Carolina*	5.3%	2.9%	4.4%	▲
8	Washington*	2.7%	0.2%	4.3%	▲
9	Pennsylvania	4.6%	2.6%	4.2%	▲
10	Alabama	5.6%	1.7%	3.6%	▲

TOP ORIGIN DESIGNATED MARKET AREAS (DMAs)

While the New York State gained share against other states in 2021, New York City saw a 1.6 percentage point decline from the previous year, though it retained its status as the top origin DMA. Utica, a historically minor DMA in Upstate New York, claimed a 3.5% share and ranked sixth on the list. Los Angeles (6.6%), Atlanta (6.3%), Houston (4.3%), and Philadelphia (3.9%) rounded out the top 5 behind New York City.

Rank	DMA	2019	2020	2021	Change '21/'20
1	New York, NY	8.1%	9.7%	8.1%	▼
2	Los Angeles, CA	3.7%	7.6%	6.6%	▼
3	Atlanta, GA	6.6%	6.1%	6.3%	—
4	Houston, TX	2.0%	4.0%	4.3%	—
5	Philadelphia, PA	4.6%	4.1%	3.9%	—
6	Utica, NY	0.0%	0.0%	3.5%	▲
7	Detroit, MI	1.6%	2.7%	3.1%	—
8	Chicago, IL	3.4%	2.3%	2.6%	—
9	Evansville, IN	0.5%	0.5%	2.6%	▲
10	Dallas-Fort Worth, TX	2.2%	2.0%	2.4%	—

Note: The Origin DMA data combines two years of data for each year shown to obtain a larger sample size, where 2021 figures are based on CY 2021-2020 data, 2020 figures are based on CY 2020-2019 data, etc.

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

DOMESTIC BUSINESS VISITORS (CONTINUED)

ACTIVITIES DURING TRIP

Aside from business and work (29%), the top activity for Florida's business visitors in 2021 was visiting the beach/waterfront (25%). Participation in beach/waterfront activities rebounded from 7% in 2020 to 25% and exceeded 2019 participation by 3 percentage points. Shopping (13%) and golf (10%) also saw strong recovery as did nightlifte (8%) and visiting friends/relatives (8%). Amateur sports dropped from 21% in 2020 to 7% in 2019, falling from second place to thirteenth.

Activity (Multiple Response)	2019	2020	2021	Change '21/'20
Business/Work	32%	47%	29%	▼
Beach/Waterfront	22%	7%	25%	▲
Culinary/Dining Experience	27%	17%	16%	—
Shopping	12%	6%	13%	▲
Golfing	3%	2%	10%	▲
Nightlife	15%	3%	8%	▲
Culinary - Special Dining Experience	-	-	8%	—
Visit Friends/Relatives	12%	4%	8%	▲
Anniversary	-	3%	8%	▲
Boating/Sailing	1%	3%	8%	▲
Touring/Sightseeing	6%	6%	8%	▲
Culinary - Typical Restaurant Dining	-	-	8%	—
Amateur Sports (attend/participate)	1%	21%	7%	▼
Theme/Amusement/Water Parks	7%	4%	6%	▲
Festival/Fairs	3%	3%	6%	▲
Hiking	2%	3%	6%	▲
Birthday	-	7%	6%	—
Historic Sites	4%	1%	5%	▲
Bicycling	1%	11%	5%	▼

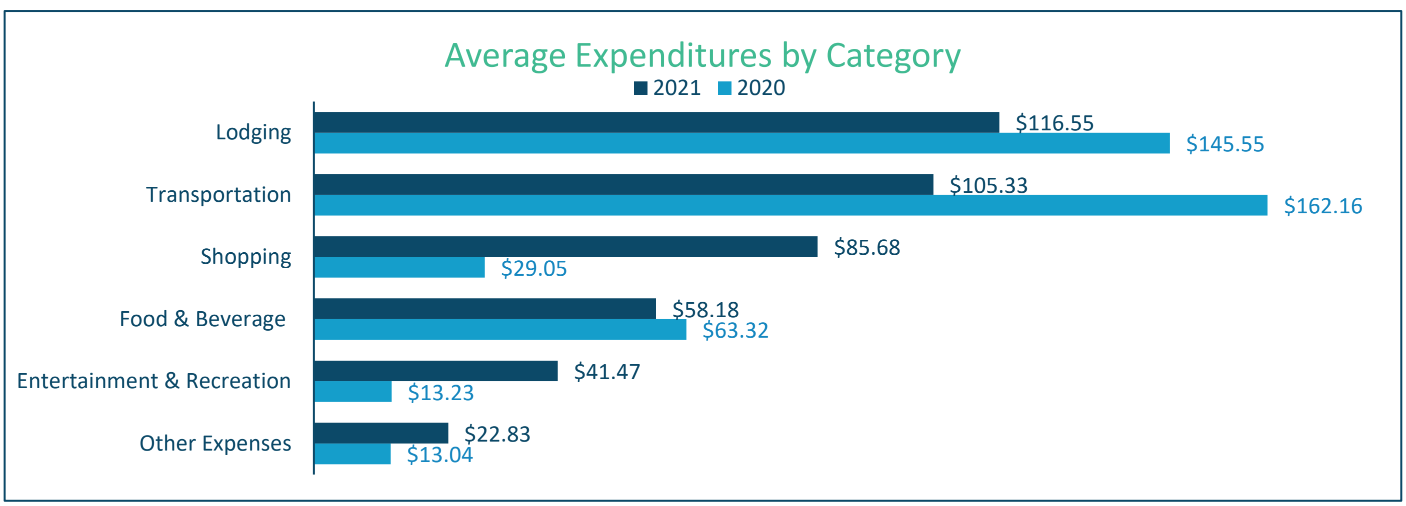
Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

DOMESTIC BUSINESS VISITORS (CONTINUED)

AVERAGE EXPENDITURES PER PERSON PER DAY

Business travelers spent 2% less on average in 2021 ($406.62) than in 2020 ($413.27), in contrast to the substantial increase in spend recorded among leisure travelers. Compared to pre-pandemic 2019, however, spend was still 40% higher, driven by growth in expenditures on shopping, food & beverages, and entertainment and recreation. The slight decline in spend from 2020 was mostly a consequence of lower spend on transportation (-35%) and lodging (-20%). These decreases are likely related to the shift toward transient business and travelers with lower household incomes. A few categories were impacted positively by the pandemic: lodging services (+210%), entertainment and recreation (+214%), and shopping (+195%).

	2019	2020	2021	Change '21/'20
Avg. Expenditures (incl. transportation)	**$289.81**	**$413.27**	**$406.62**	**-2%**
Avg. Expenditures (excl. transportation)	**$176.12**	**$251.11**	**$301.29**	**20%**
Lodging - Total	$113.14	$145.55	$116.55	-20%
Lodging - Room	*$124.78*	*$138.32*	*$87.83*	*-37%*
Lodging - Services (internet, parking, etc.)	*$13.86*	*$13.75*	*$42.60*	*210%*
Transportation - Total	$113.69	$162.16	$105.33	-35%
Transportation - Total (excluding airfare)	*$40.32*	*$96.17*	*$70.98*	*-26%*
Transportation - Airfare	*$116.19*	*$122.96*	*$120.24*	*-2%*
Transportation - Rental Car	*$54.45*	*$80.06*	*$71.90*	*-10%*
Transportation - Other (taxi, bus, gas, etc.)	*$18.88*	*$56.49*	*$41.29*	*-27%*
Shopping	$12.10	$29.05	$85.68	195%
Food & Beverage	$47.36	$63.32	$58.18	-8%
Entertainment & Recreation	$10.27	$13.23	$41.47	214%
Other Expenses	$5.68	$13.04	$22.83	75%



Source: D.K. Shifflet

VISIT FLORIDA

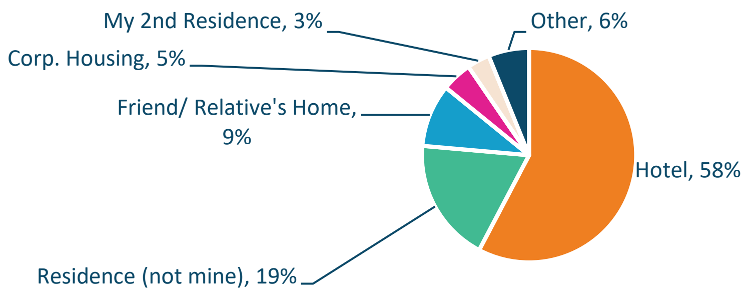
DOMESTIC BUSINESS VISITORS (CONTINUED)

PAID VS. NON-PAID ACCOMMODATIONS

Business visitors were less likely to stay in a paid hotel accommodation (58%) and more likely to stay in a paid non-hotel accommodation (34%) in 2021. The share of visitors staying in a residence that they didn't own rose to 19% from 15% in 2020, reflecting a pandemic-related increase in the popularity of shared accoomdations and vacation rentals. The share of business visitors staying with a friend or relative tripled from 3% to 9% over the same period.

	2019	2020	2021	Change '21/'20
Paid	**93%**	**98%**	**92%**	▼
Hotel Paid	*82%*	*74%*	*58%*	▼
Non-Hotel Paid	*11%*	*24%*	*34%*	▲
Non-Paid	**7%**	**2%**	**8%**	▲

ACCOMMODATION TYPE



HOTEL LEVEL

In 2021, many corporate events and conventions were affected due to the pandemic. As a result, high-end hotel accommodation stays were off from 2019 by 14 percentage points (43%), while shares increased at moderate (19%) and lower moderate (4%) properties.

	2019	2020	2021	Change '21/'20
High End	**57%**	**40%**	**43%**	▲
Luxury	6%	10%	16%	▲
Upscale	51%	30%	27%	▼
Mid-Level	**35%**	**46%**	**43%**	▼
Upper Moderate	16%	30%	24%	▼
Moderate	19%	16%	19%	▲
Economy	**8%**	**14%**	**15%**	—
Lower Moderate	3%	3%	4%	—
Budget	5%	11%	11%	—

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

DOMESTIC BUSINESS VISITORS (CONTINUED)

LENGTH OF STAY

Average length of stay fell to 2.5 nights in 2021, down from 2.6 in 2020 and 3.1 in 2019. This was attributable to a 2 percentage point increase in the share of business visitors staying 1 to 3 nights (77%). The decrease in length of stay for business visitors was proportionally smaller than the decline recorded for leisure visitors.

	2019	2020	2021	Change '21/'20
1-3 nights	71%	75%	77%	▲
4-7 nights	24%	24%	21%	▼
8+ nights	4%	1%	2%	—
Average Nights in Florida	**3.1**	**2.6**	**2.5**	—
Median Nights in Florida	**2.2**	**1.6**	**1.5**	▼

ACCOMMODATION RESERVATION TYPE

Over half (57%) of business visitors booked their accommodations in Florida via an online method. The growth in the share of visitors booking online was driven by a 6 percentage point increase in the share booking through a travel website (10%) and an eight-fold increase in the share booking through a non-hotel accommodation website or app (8%). Travel agents retained a stable 14% share, while the share calling to book directly with the accommodations fell 8 percentage points to 19% but remained higher than in pre-COVID 2019.

	2019	2020	2021	Change '21/'20
Made Reservation	**95%**	**95%**	**90%**	▼
Online	48%	51%	57%	▲
Hotel Chain Website/app	*27%*	*46%*	*38%*	▼
Travel Website	*20%*	*4%*	*10%*	▲
Non-Hotel Accommodations Site/App	*1%*	*1%*	*8%*	▲
Called Directly	4%	27%	19%	▼
Travel Agent/Corp. Travel Agent	14%	14%	14%	—
Other	28%	3%	0.1%	▼
No Reservation	**5%**	**5%**	**10%**	▲

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

DOMESTIC BUSINESS VISITORS (CONTINUED)

TRIP PLANNING TIME FRAME

The share of business visitors planning their trip a week or less prior to departure rose from 23% in 2020 to 37% in 2021, significantly above the 19% share in 2019. The share planning 4 months or more in advance returned to a pre-pandemic share of 11% after falling to 6% in 2020, pointing to a small increase in confidence among travelers after significant disruptions early in the pandemic.

	2019	2020	2021	Change '21/'20
1 Week or Less	19%	23%	37%	▲
2-3 Weeks	24%	26%	22%	▼
1 Month	19%	29%	19%	▼
2-3 Months	27%	16%	12%	▼
4-5 Months	6%	2%	5%	▲
6 Months	2%	3%	3%	—
More Than 6 Months	4%	1%	3%	▲

TRIP PLANNING RESOURCES USED

Eighty-six percent of Florida's business visitors reported using a resource to plan their trip in 2021, up from 81% in 2020 as visitors continued to face the challenges of planning in the midst of the pandemic. Accommodations websites/apps were the top resource used (26%), followed by past experience (24%), and internet search (24%).

	2019	2020	2021	Change '21/'20
Used Resource	**67%**	**81%**	**86%**	▲
Accommodations Websites/Apps	21%	19%	26%	▲
Past Experience	25%	19%	24%	▲
Internet Search (Bing, Google, etc.)	14%	32%	21%	▼
Friend/Family Recommendation	11%	34%	15%	▼
Social Networking Sites (Facebook, etc.)	3%	11%	15%	▲
Destination Visitor Guides - Online	2%	20%	15%	▼
Destination Websites	7%	4%	14%	▲
Travel Booking Website (Expedia, etc.)	10%	7%	13%	▲
AAA Travel Guides (Online or Printed)	1%	8%	11%	▲
Attraction Websites	3%	7%	9%	▲
No Resource Used	**33%**	**19%**	**14%**	▼

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

DOMESTIC BUSINESS VISITORS (CONTINUED)

AGE OF ADULT TRAVELERS

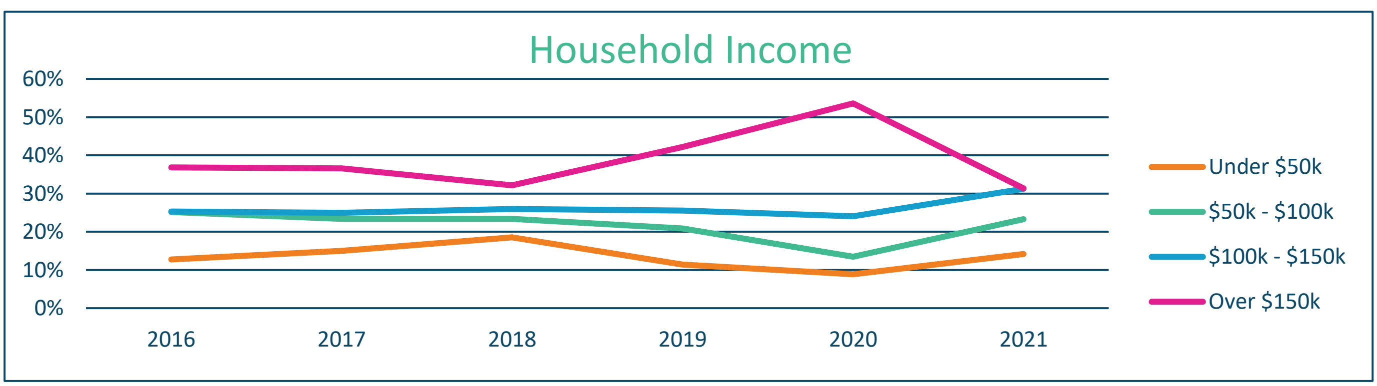
Florida's business visitors tended to be younger in 2021; the median age fell to 37 years from 40 in 2020 and 43 in 2019. This shift was the result of a 24 percentage point increase in the share of visitors between the ages of 18 and 34, with the age group claiming a 40% plurality of visitors in 2021. Visitors between the ages of 35 and 49, who had risen to a majority (54%) in 2020 from 35% the previous year, saw their share slip to 36%.

	2019	2020	2021	Change '21/'20
18 - 34 Years Old	31%	16%	40%	▲
35 - 49 Years Old	35%	54%	36%	▼
50 - 64 Years Old	25%	23%	19%	▼
65+ Years Old	9%	8%	5%	▼
Average Age	**44.5**	**44.4**	**40.1**	▼
Median Age	**43**	**40**	**37**	▼

HOUSEHOLD INCOME

Median household income trended downward in 2021, dropping 24% from the previous year to $119,427. The decline was attributable to a significant drop in the share of visitors earning $150,000 or more annually, which fell to 31% from 54% the previous year.

	2019	2020	2021	Change '21/'20
Under $50,000	11%	9%	14%	▲
$50,000 - $74,999	10%	5%	8%	▲
$75,000 - $99,999	11%	8%	15%	▲
$100,000 - $149,999	26%	24%	31%	▲
$150,000+	42%	54%	31%	▼
Average	**$149,151**	**$184,269**	**$138,309**	-25%
Median	**$134,459**	**$158,096**	**$119,427**	-24%



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

DOMESTIC BUSINESS VISITORS (CONTINUED)

GENERATION

Millennial and Gen Z travelers accounted for 63% of business visitors in 2021, a notable jump from 46% in 2020. This points to a generational shift in the workforce, as well as the return to travel of younger people who showed hesitancy early in the pandemic.

	2019	2020	2021	Change '21/'20
Millennials/Gen Z (1981 or later)	42%	46%	63%	▲
GenX (1965-1980)	32%	35%	24%	▼
Boomers (1946 -1964)	24%	18%	13%	▼
Silent/GI (1945 or earlier)	2%	2%	0%	▼

LIFESTAGE

The share of business visitors in family lifestages continued to grow in 2021, climbing to 55% from 37% in 2020 and 33% in 2019. Those with young families accounted for 24% of business visitors, a remarkable recovery after falling to 1% in 2020. Maturing & Free visitors dropped 18 percentage points to 11%, while Moderate Mature visitors slid 4 percentage points to 3%. Affluent Mature travelers gained share, rising 3 percentage points to 15%.

	2019	2020	2021	Change '21/'20
Young & Free (18-34; any income; no kids)	24%	15%	16%	—
Young Family (18-34; any income; kids in HH)	8%	1%	24%	▲
Maturing & Free (35-54; any income; no kids)	19%	29%	11%	▼
Moderate Family (35-54; <$75K; kids in HH)	3%	6%	2%	▼
Affluent Family (35-54; $75K+; kids in HH)	22%	30%	29%	—
Moderate Mature (55 or older, <$100K; no kids)	5%	7%	3%	▼
Affluent Mature (55 or older; $100K+, no kids)	19%	12%	15%	▲

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 than visitors to any other region in 2021, with an average age of 44 years. Visitors to the Central region stayed in paid accommodations (89%) and flew to Florida (35%) at higher rates than visitors to most other regions, contributing to these visitors having the highest average per person, per day expenditures in the state ($301.80). Visiting theme/amusement/water parks (35%) was the most popular activity for visitors to the region in 2021 followed by shopping (21%) and culinary/dining experiences (21%).

CENTRAL EAST REGION:

> Leisure visitors accounted for 90% of all visitors to the Central East region in 2021, with vacation/getaway weekends (45%) being the most common purpose for such trips. The average length of stay for visitors to the region reached 4.9 nights in 2021, the third-longest among the regions in the state. Visitors to the area were most likely to be found visiting the beach/waterfront (49%), shopping (37%), and spending time with friends/relatives (25%) during their stay. Origin states were more varied in 2021 than in 2019, and Pennsylvania was the top source of visitors rather than Georgia.

CENTRAL WEST REGION:

> The average age of visitors to the Central West region was 52 years in 2021, with nearly 6 in 10 (57%) of visitors being 55 or older. Forty-three percent traveled alone, and 19% were business travelers. The Central West region had a comparably larger share of visitors staying in non-paid accommodations (25%) than most other regions, despite a decrease in the number of those visiting friends/relatives (28%) compared to 2019. The summer was the most common month for visitors to travel to the Central West region, accounting for 33% of the annual total.

NORTH CENTRAL REGION:

> Fifty-nine percent of visitors to the North Central region visited in Winter – a marked increase from 2019. Fall - historically a popular travel season – was instead the slowest. Nine in ten (93%) drove or took a means other than air travel to the region, and the top 4 origin states were all in the South (Georgia, Mississippi, Texas, and Alabama). Average party size (1.7) and length of stay (2.9 nights) were both relatively small compared to other regions. North Central visitors were by far the

most likely to be visiting for the purpose of seeing friends/relatives (63%). Still, over a third made time to shop (36%) and have a culinary/dining experience (35%).

NORTHEAST REGION:

> Summer was the most popular season for visitors to the Northeast region in 2021, accounting for 30% of the annual total. Georgia was still the region's top origin state, but its share (12.8%) was down notably from 2019 as northern states like Michigan and Pennsylvania increased theirs. Despite these shifts, travel by air was down slightly at 17%. Paid hotels (43%) were the most popular accommodation type as the popularity of non-paid accommodations (31%) dropped from 2019. Mid-level properties were preferred by visitors who stayed in hotels (61%). Visiting the beach/waterfront (32%) was the most popular activity in 2021, followed by visiting friends/relatives (17%).

NORTHWEST REGION:

> A larger share of visitors to the Northwest region traveled to the area for a vacation or getaway weekend (62%) than in any other region in 2021. 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 4 origin states in 2021 were all in the South and easily accessible by car: Alabama (15.7%), Texas (11.5%), Tennessee (10.5%), Georgia (9.6%). Visitors to the Northwest region were more likely to travel with children (18%) than most other regions. Popular activities for visitors in 2021 included going to the beach/waterfront (70%), enjoying culinary/dining experiences (28%), and shopping (27%).

SOUTHEAST REGION:

> The Southeast region drew the third most affluent visitors of any region – a departure from 2019 when it drew the most affluent. Despite this, visitors to the region spent the second most per person per day with an average spend of $253.50. Forty-one percent stayed in a paid hotel, of which more than half (56%) opted for a high-end property. New York (10.4%) remained the top origin state, while some southern states slid into the top five: Alabama (9.5%), Georgia (7.3%), and Texas (7.3%). Nearly a third (32%) of visitors traveled to the region by air. Going to the beach/waterfront was the most common activity for visitors (46%), followed by culinary/dining experiences (23%), shopping (20%), and visiting friends/relatives (18%).

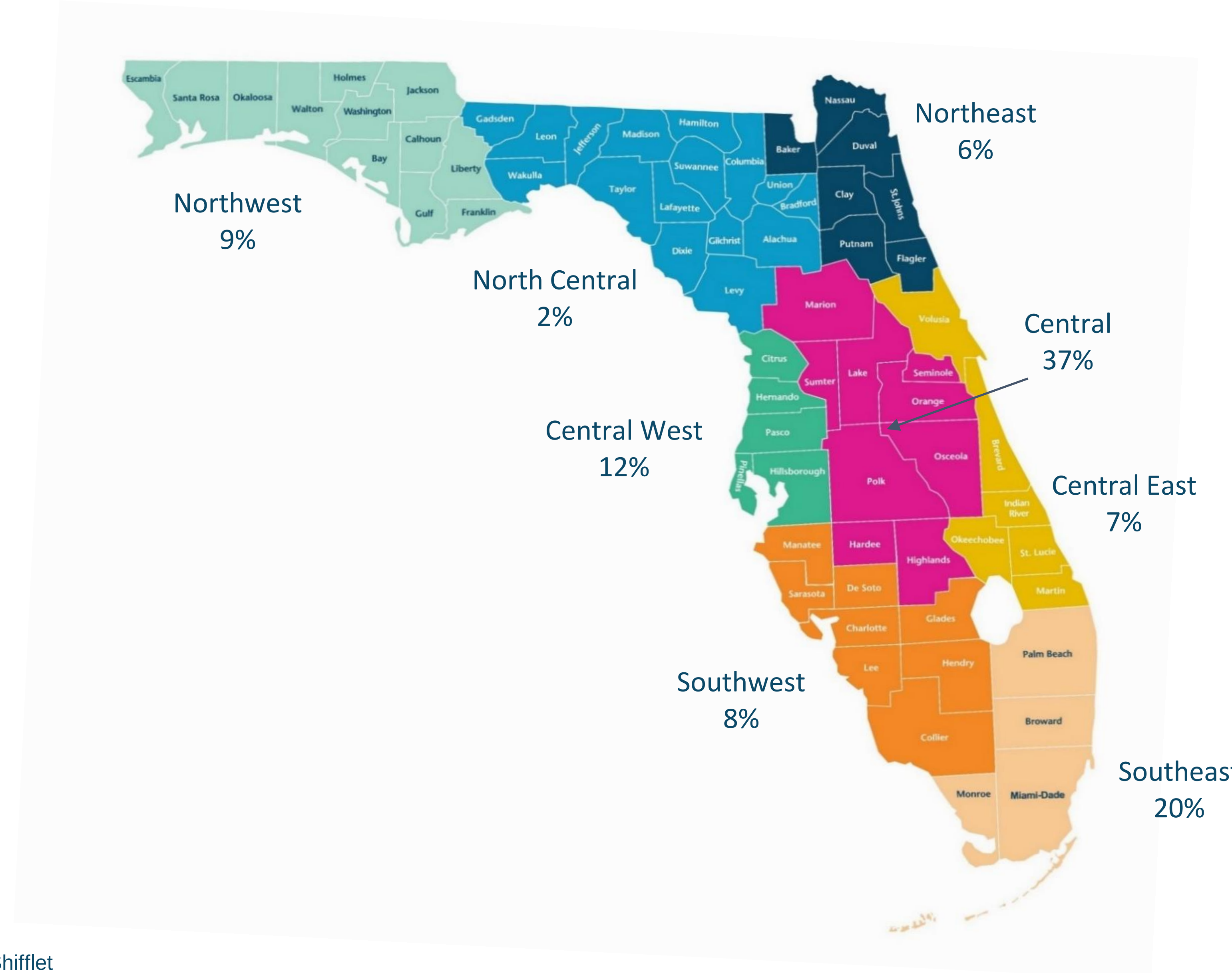
SOUTHWEST REGION:

> Visitors to the Southwest region were older on average than those who traveled to most other parts of the state in 2021, with an average age of 57 years. They also stayed longer on average (7.2 nights), as 59% were in-destination more than 3 nights. Winter (33%) and Spring (25%) were the busiest seasons, accounting for 58% of annual visitors. New York (13.2%), Indiana (7.6%), and Michigan (7.5%) were the top 3 origin states in 2021, with a combined 28% of visitors. Slightly less than half (48%) of visitors traveled to the Southwest region in a travel party consisting of

one male and one female, while 34% were solo adults and 7% traveled with children. In 2021, going to the beach/waterfront (56%) was the top activity, followed by visiting friends/relatives (28%), and typical restaurant dining experiences (27%).

DOMESTIC VACATION REGIONS

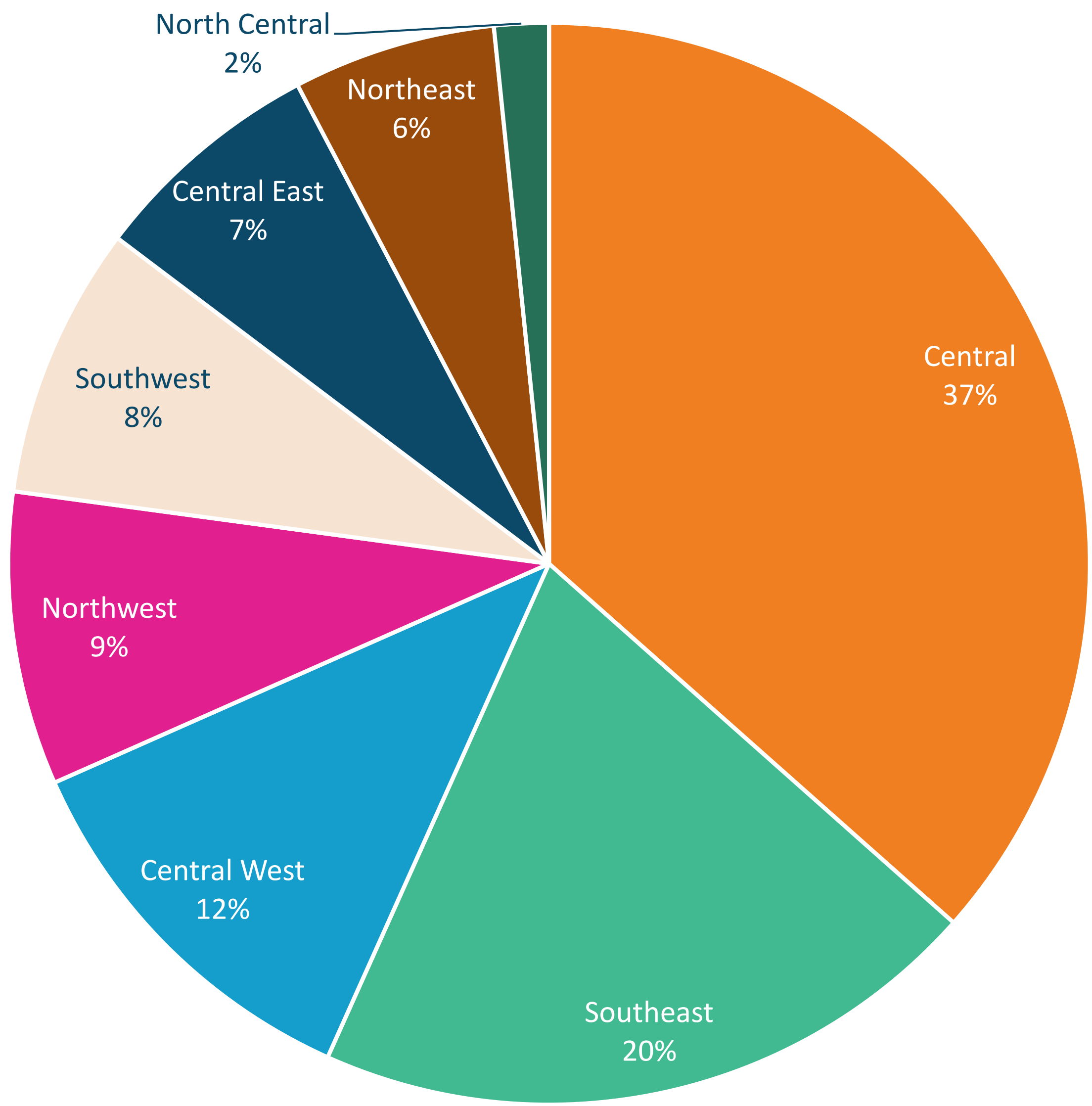
SHARE OF 2021 DOMESTIC VISITORS BY VACATION REGION



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

	2019	2020	2021	Change '21/'20
Leisure	**90%**	**93%**	**89%**	▼
Vacation/Getaway Weekend	58%	63%	50%	▼
Visit Friends/Relatives	18%	13%	12%	—
Other Leisure	14%	16%	27%	▲
Business	**10%**	**7%**	**11%**	▲
Group Meetings	7%	6%	7%	—
Transient Business	3%	1%	3%	▲

TRANSPORTATION TYPE

	2019	2020	2021	Change '21/'20
Air	46%	33%	35%	▲
Non-Air	54%	67%	65%	▼

SEASONALITY

	2019	2020	2021	Change '21/'20
Winter (Dec, Jan, Feb)	27%	64%	22%	▼
Spring (Mar, Apr, May)	27%	7%	24%	▲
Summer (Jun, Jul, Aug)	25%	10%	32%	▲
Fall (Sept, Oct, Nov)	21%	19%	21%	▲

TRAVEL PARTY COMPOSITION

	2019	2020	2021	Change '21/'20
One Man and One Women	33%	40%	38%	▼
One Adult	30%	38%	32%	▼
Families	26%	14%	19%	▲
Three or More Adults	6%	4%	7%	▲
Two Men and Two Women	5%	5%	4%	—
Average Party Size	**2.3**	**2.2**	**2.2**	—

Source: DK Shifflet; Arrows indicate change of at least 2 percentage points; Profile based on small sample size

DOMESTIC VISITORS TO CENTRAL FL

TOP ORIGIN STATES

	2019	2020	2021	Change '21/'20
Georgia	5.4%	7.4%	12.6%	▲
Indiana	5.3%	0.9%	10.5%	▲
New York	10.2%	4.5%	9.0%	▲
Texas	5.3%	3.3%	5.8%	▲
Alabama	3.4%	20.3%	5.3%	▼

TOP ORIGIN DESIGNATED MARKET AREAS (DMAs)

	2019	2020	2021	Change '21/'20
New York, NY	11.4%	6.1%	8.5%	▲
Atlanta, GA	3.8%	5.7%	6.6%	▲
Chicago, IL	5.4%	5.7%	3.9%	▼
Philadelphia, PA	5.5%	3.5%	2.9%	▼
Birmingham, AL	1.0%	16.8%	2.9%	▼

ACTIVITIES DURING TRIP

	2019	2020	2021	Change '21/'20
Theme/Amusement/Water Parks	46%	40%	35%	▼
Shopping	32%	27%	21%	▼
Culinary/Dining Experience	28%	21%	21%	—
Culinary - Typical Restaurant Dining	-	-	19%	-
Beach/Waterfront	14%	20%	17%	▼
Visit Friends/Relatives	26%	31%	16%	▼

LENGTH OF STAY

	2019	2020	2021	Change '21/'20
1-3 nights	42%	36%	49%	▲
4-7 nights	50%	49%	41%	▼
8+ nights	8%	14%	10%	▼
Average Nights in Florida	**4.5**	**5.2**	**4.4**	▼
Median Nights in Florida	**3.2**	**3.4**	**2.8**	▼

Source: DK 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

	2019	2020	2021	Change '21/'20
Paid	**81%**	**86%**	**89%**	▲
Hotel Paid	*51%*	*35%*	*46%*	▲
Non-Hotel Paid	*31%*	*51%*	*43%*	▼
Non-Paid	**19%**	**14%**	**11%**	▼

HOTEL LEVEL

	2019	2020	2021	Change '21/'20
High End	**47%**	**43%**	**47%**	▲
Luxury	15%	16%	24%	▲
Upscale	32%	28%	24%	▼
Mid-Level	**43%**	**41%**	**36%**	▼
Upper Moderate	20%	17%	16%	—
Moderate	23%	24%	20%	▼
Economy	**10%**	**15%**	**17%**	▲
Lower Moderate	7%	5%	7%	▲
Budget	3%	10%	10%	—

ACCOMMODATION RESERVATION TYPE

	2019	2020	2021	Change '21/'20
Made Reservation	**96%**	**96%**	**92%**	▼
Online	44%	47%	62%	▲
Hotel Chain Website	*24%*	*27%*	*37%*	▲
Travel Website	*11%*	*16%*	*13%*	▼
Non-Hotel Accommodations Site/App	*6%*	*5%*	*12%*	▲
Hotel Mobile App	*3%*	*0%*	*0%*	—
Called Directly	11%	38%	17%	▼
Travel Agent	2%	6%	7%	—
As Part of a Package	26%	0%	0%	—
Other	14%	5%	5%	—
No Reservation	**4%**	**4%**	**8%**	▲

Source: DK 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

	2019	2020	2021	Change '21/'20
Less than 1 week	5%	6%	8%	▲
1-3 weeks	13%	22%	26%	▲
1 month	17%	18%	17%	—
2-3 months	30%	26%	21%	▼
4-5 months	10%	9%	9%	—
6 months or more	25%	19%	19%	—

TRIP PLANNING RESOURCES USED

	2019	2020	2021	Change '21/'20
Used Resource	**82%**	**78%**	**85%**	▲
Past Experience	36%	46%	41%	▼
Accommodation Websites / Apps	19%	16%	22%	▲
Internet Search (Bing, Google, etc.)	20%	18%	15%	▼
Attraction Websites	17%	12%	14%	▲
Friend/Family/Colleague Recommendation	19%	24%	14%	▼
No Resource Used	**18%**	**22%**	**15%**	▼

AVERAGE EXPENDITURES PER PERSON PER DAY

	2019	2020	2021	Change '21/'20
Avg. Expenditures (incl. transportation)	**$195.00**	**$193.87**	**$301.80**	**56%**
Avg. Expenditures (excl. transportation)	**$146.93**	**$146.38**	**$231.09**	**58%**
Transportation - Total	$48.07	$47.48	$70.71	49%
Transportation - Airfare	*$55.78*	*$49.43*	*$84.58*	*71%*
Transportation - Rental Car	*$42.05*	*$46.31*	*$75.81*	*64%*
Transportation (taxi, bus, gas, etc.)	*$11.49*	*$17.58*	*$19.57*	*11%*
Lodging - Total	$66.33	$61.29	$82.83	35%
Lodging - Room	*$77.24*	*$60.56*	*$76.88*	*27%*
Lodging - Services	*$16.51*	*$1.98*	*$15.19*	*667%*
Food & Beverage	$41.00	$40.70	$58.84	45%
Entertainment & Recreation	$31.53	$42.32	$50.44	19%
Shopping	$20.20	$17.01	$43.76	157%
Other Expenses	$4.98	$4.00	$13.81	245%

Source: DK Shifflet; Arrows indicate change of at least 2 percentage points; Profile based on small sample size

DOMESTIC VISITORS TO CENTRAL FL

AGE OF ADULT TRAVELERS

	2019	2020	2021	Change '21/'20
18 - 34 Years Old	28%	13%	36%	▲
35 - 49 Years Old	34%	15%	25%	▲
50 - 64 Years Old	22%	45%	25%	▼
65+ Years Old	17%	27%	14%	▼
Average Age	**46.4**	**55.1**	**44.4**	▼
Median Age	**44**	**53**	**43**	▼

HOUSEHOLD INCOME

	2019	2020	2021	Change '21/'20
Under $50,000	18%	16%	24%	▲
$50,000 - $74,999	15%	16%	13%	▼
$75,000 - $99,999	15%	16%	20%	▲
$100,000 - $149,999	23%	17%	18%	—
Over $150,000	28%	35%	25%	▼
Average Household Income	**$119,100**	**$126,100**	**$113,100**	▼
Median Household Income	**$103,200**	**$105,900**	**$91,700**	▼

GENERATION

	2019	2020	2021	Change '21/'20
Millennials/Gen Z (Born 1981 or later)	35%	16%	47%	▲
GenX (Born 1965-1980)	36%	39%	25%	▼
Boomers (Born 1946 -1964)	26%	37%	26%	▼
Silent/GI (Born 1945 or earlier)	3%	9%	2%	▼

Source: DK 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

	2019	2020	2021	Change '21/'20
Leisure	**97%**	**98%**	**90%**	▼
Vacation/Getaway Weekend	46%	40%	45%	▲
Visit Friends/Relatives	37%	38%	25%	▼
Other Leisure	14%	20%	20%	—
Business	**3%**	**2%**	**10%**	▲
Group Meetings	2%	1%	6%	▲
Transient Business	1%	1%	4%	▲

TRANSPORTATION TYPE

	2019	2020	2021	Change '21/'20
Air	26%	27%	17%	▼
Non-Air	74%	73%	83%	▲

SEASONALITY

	2019	2020	2021	Change '19/'18
Winter (Dec, Jan, Feb)	26%	58%	23%	▼
Spring (Mar, Apr, May)	26%	13%	20%	▲
Summer (Jun, Jul, Aug)	25%	14%	30%	▲
Fall (Sept, Oct, Nov)	23%	15%	27%	▲

TRAVEL PARTY COMPOSITION

	2019	2020	2021	Change '21/'20
One Adult	37%	27%	40%	▲
One Male and One Female	39%	54%	39%	▼
Families	13%	6%	9%	▲
Two Males or Two Females	5%	7%	7%	—
Three or More Adults	6%	6%	4%	▼
Average Party Size	**2.0**	**1.9**	**1.9**	▼

Source: DK 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

	2019	2020	2021	Change '21/'20
Pennsylvania	4.3%	3.9%	10.3%	▲
Ohio	4.6%	3.3%	9.9%	▲
North Carolina	13.0%	1.7%	8.1%	▲
Georgia	14.6%	3.1%	6.4%	▲
South Carolina	4.9%	2.1%	5.8%	▲

TOP ORIGIN DESIGNATED MARKET AREAS (DMAs)

	2019	2020	2021	Change '21/'20
New York, NY	10.9%	8.8%	7.2%	▼
Atlanta, GA	7.8%	2.9%	6.2%	▲
Philadelphia, PA	1.4%	2.7%	5.5%	▲
Washington, DC (Hagerstown, MD)	3.0%	5.6%	4.7%	▼
Boston, MA (Manchester, NH)	2.0%	4.4%	4.0%	—

ACTIVITIES DURING TRIP

	2019	2020	2021	Change '21/'20
Beach/Waterfront	63%	53%	49%	▼
Shopping	27%	26%	37%	▲
Culinary - Typical Restaurant Dining	-	-	28%	-
Visit Friends/Relatives	53%	43%	25%	▼
Culinary/Dining Experience	35%	31%	20%	▼
Touring/Sightseeing	16%	20%	13%	▼

LENGTH OF STAY

	2019	2020	2021	Change '21/'20
1-3 nights	43%	39%	50%	▲
4-7 nights	45%	35%	33%	▼
8+ nights	12%	26%	17%	▼
Average Nights in Florida	**4.7**	**8.4**	**4.9**	▼
Median Nights in Florida	**3.5**	**3.6**	**2.5**	▼

Source: DK 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

	2019	2020	2021	Change '21/'20
Paid	**57%**	**60%**	**85%**	▲
Hotel Paid	*28%*	*29%*	*45%*	▲
Non-Hotel Paid	*29%*	*31%*	*40%*	▲
Non-Paid	**43%**	**40%**	**15%**	▼

HOTEL LEVEL

	2019	2020	2021	Change '21/'20
High End	**30%**	**7%**	**30%**	▲
Luxury	1%	0%	8%	▲
Upscale	29%	7%	22%	▲
Mid-Level	**57%**	**66%**	**48%**	▼
Upper Moderate	19%	29%	10%	▼
Moderate	38%	38%	37%	—
Economy	**13%**	**26%**	**22%**	▼
Lower Moderate	6%	11%	8%	▼
Budget	7%	16%	14%	▼

ACCOMMODATION RESERVATION TYPE

	2019	2020	2021	Change '21/'20
Made Reservation	**93%**	**90%**	**80%**	▼
Online	45%	42%	54%	▲
Hotel Chain Website	*30%*	*22%*	*27%*	▲
Travel Website	*7%*	*15%*	*14%*	—
Non-Hotel Accommodations Site/App	*5%*	*5%*	*13%*	▲
Hotel Mobile App	*3%*	*0%*	*0%*	—
Called Directly	24%	27%	14%	▼
Travel Agent	6%	5%	7%	▲
As Part of a Package	8%	0%	0%	—
Other	10%	16%	6%	▼
No Reservation	**7%**	**10%**	**20%**	▲

Source: DK 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

	2019	2020	2021	Change '21/'20
Less than 1 week	5%	2%	12%	▲
1-3 weeks	12%	17%	24%	▲
1 month	18%	18%	16%	▼
2-3 months	38%	29%	27%	▼
4-5 months	8%	8%	5%	▼
6 months or more	19%	26%	16%	▼

TRIP PLANNING RESOURCES USED

	2019	2020	2021	Change '21/'20
Used Resource	**82%**	**75%**	**76%**	—
Past Experience	47%	64%	48%	▼
Friend/Family/Colleague Recommendation	23%	17%	21%	▲
Accommodation Websites / Apps	17%	17%	18%	—
Internet Search (Bing, Google, etc.)	11%	26%	16%	▼
Travel Booking Website (Expedia, etc.)	8%	7%	14%	▲
No Resource Used	18%	25%	24%	—

AVERAGE EXPENDITURES PER PERSON PER DAY

	2019	2020	2021	Change '21/'20
Avg. Expenditures (incl. transportation)	**$114.02**	**$113.81**	**$159.78**	**40%**
Avg. Expenditures (excl. transportation)	**$83.16**	**$85.20**	**$116.13**	**36%**
Lodging - Total	$41.54	$47.72	$44.31	-7%
Lodging - Room	*$52.26*	*$57.15*	*$47.03*	*-18%*
Lodging - Services (internet, parking, etc.)	*$5.72*	*$0.40*	*$1.96*	*391%*
Transportation - Total	$30.86	$28.61	$43.66	53%
Transportation - Airfare	*$37.22*	*$30.32*	*$57.52*	*90%*
Transportation - Rental Car	*$35.97*	*$41.20*	*$53.84*	*31%*
Transportation - Other (taxi, bus, gas, etc.)	*$13.03*	*$11.19*	*$20.01*	*79%*
Food & Beverage	$30.05	$34.10	$38.73	14%
Shopping	$14.41	$12.55	$27.41	118%
Entertainment & Recreation	$14.67	$8.86	$14.31	61%
Other Expenses	$3.79	$3.61	$7.00	94%

Source: DK 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

	2019	2020	2021	Change '21/'20
18 - 34 Years Old	18%	4%	16%	▲
35 - 49 Years Old	19%	6%	19%	▲
50 - 64 Years Old	37%	35%	27%	▼
65+ Years Old	27%	55%	38%	▼
Average Age	**52.9**	**62.9**	**55.7**	▼
Median Age	**55**	**65**	**60**	▼

HOUSEHOLD INCOME

	2019	2020	2021	Change '21/'20
Under $50,000	35%	17%	23%	▲
$50,000 - $74,999	19%	12%	28%	▲
$75,000 - $99,999	12%	12%	15%	▲
$100,000 - $149,999	16%	41%	20%	▼
Over $150,000	18%	18%	14%	▼
Average Household Income	**$97,000**	**$113,700**	**$93,600**	▼
Median Household Income	**$71,400**	**$110,800**	**$71,300**	▼

GENERATION

	2019	2020	2021	Change '21/'20
Millennials/Gen Z (Born 1981 or later)	22%	8%	20%	▲
GenX (Born 1965-1980)	26%	11%	24%	▲
Boomers (Born 1946 -1964)	46%	70%	51%	▼
Silent/GI (Born 1945 or earlier)	6%	12%	5%	▼

Source: DK 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

	2019	2020	2021	Change '21/'20
Leisure	**90%**	**91%**	**81%**	▼
Vacation/Getaway Weekend	39%	45%	33%	▼
Visit Friends/Relatives	37%	29%	28%	—
Other Leisure	14%	17%	19%	▲
Business	**10%**	**9%**	**19%**	▲
Transient Business	4%	2%	14%	▲
Group Meetings	6%	7%	5%	▼

TRANSPORTATION TYPE

	2019	2020	2021	Change '21/'20
Air	41.1%	22.6%	32.1%	▲
Non-Air	58.9%	77.4%	67.9%	▼

SEASONALITY

	2019	2020	2021	Change '21/'20
Winter (Dec, Jan, Feb)	26%	44%	20%	▼
Spring (Mar, Apr, May)	31%	25%	25%	—
Summer (Jun, Jul, Aug)	23%	14%	33%	▲
Fall (Sept, Oct, Nov)	20%	17%	22%	▲

TRAVEL PARTY COMPOSITION

	2019	2020	2021	Change '21/'20
One Adult	51%	37%	43%	▲
One Male and One Female	31%	35%	34%	—
Families	11%	15%	15%	—
Three or More Adults	4%	8%	5%	▼
Two Males or Two Females	3%	6%	4%	▼
Average Party Size	**1.7**	**2.0**	**2.0**	▼

Source: DK 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

	2019	2020	2021	Change '21/'20
New York	11.2%	5.5%	17.5%	▲
Michigan	5.2%	2.3%	6.5%	▲
Pennsylvania	4.2%	5.1%	5.8%	▲
Texas	3.1%	3.7%	5.7%	▲
Tennessee	1.5%	4.6%	5.7%	▲

TOP ORIGIN DESIGNATED MARKET AREAS (DMAs)

	2019	2020	2021	Change '21/'20
New York, NY	10.7%	4.4%	10.6%	▲
Philadelphia, PA	3.6%	1.2%	4.8%	▲
Chicago, IL	3.0%	6.9%	4.2%	▼
Baltimore, MD	0.5%	1.2%	3.7%	▲
Detroit, MI	2.3%	1.5%	3.4%	▲

ACTIVITIES DURING TRIP

	2019	2020	2021	Change '21/'20
Beach/Waterfront	45%	26%	41%	▲
Visit Friends/Relatives	49%	33%	31%	▼
Culinary - Typical Restaurant Dining	-	-	23%	-
Shopping	24%	17%	21%	▲
Culinary/Dining Experience	31%	14%	19%	▲
Touring/Sightseeing	12%	10%	13%	▲

LENGTH OF STAY

	2019	2020	2021	Change '21/'20
1-3 nights	64%	60%	55%	▼
4-7 nights	30%	25%	34%	▲
8+ nights	6%	15%	11%	▼
Average Nights in Florida	**3.7**	**4.8**	**4.9**	▲
Median Nights in Florida	**2.3**	**2.6**	**2.6**	▲

Source: DK 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

	2019	2020	2022	Change '21/'20
Paid	**56%**	**71%**	**75%**	▲
Hotel Paid	*39%*	*43%*	*36%*	▼
Non-Hotel Paid	*17%*	*28%*	*39%*	▲
Non-Paid	**44%**	**29%**	**25%**	▼

HOTEL LEVEL

	2019	2020	2021	Change '21/'20
High End	**43%**	**16%**	**43%**	▲
Luxury	3%	2%	2%	—
Upscale	41%	14%	40%	▲
Mid-Level	**44%**	**73%**	**43%**	▼
Upper Moderate	15%	12%	16%	▲
Moderate	29%	61%	27%	▼
Economy	**13%**	**11%**	**14%**	▲
Lower Moderate	11%	8%	4%	▼
Budget	3%	3%	10%	▲

ACCOMMODATION RESERVATION TYPE

	2019	2020	2021	Change '19/'18
Made Reservation	**90%**	**88%**	**96%**	▲
Online	52%	73%	72%	—
Hotel Chain Website	*31%*	*53%*	*35%*	▼
Travel Website	*15%*	*13%*	*19%*	▲
Non-Hotel Accommodations Site/App	*3%*	*7%*	*18%*	▲
Hotel Mobile App	*3%*	*0%*	*0%*	—
Called Directly	10%	7%	16%	▲
Travel Agent	5%	2%	7%	▲
As Part of a Package	12%	0%	0%	—
Other	11%	6%	2%	▼
No Reservation	**10%**	**12%**	**4%**	▼

Source: DK Shifflet; Arrows indicate change of at least 2 percentage points; Profile based on small sample size

VISIT FLORIDA

DOMESTIC VISITORS TO CENTRAL WEST FL

TRIP PLANNING TIME FRAME

	2019	2020	2021	Change '21/'20
Less than 1 week	6%	3%	8%	▲
1-3 weeks	30%	24%	23%	—
1 month	18%	18%	24%	▲
2-3 months	30%	26%	27%	—
4-5 months	7%	9%	7%	▼
6 months or more	9%	20%	10%	▼

TRIP PLANNING RESOURCES USED

	2019	2020	2021	Change '21/'20
Used Resource	**76%**	**70%**	**80%**	▲
Past Experience	35%	52%	41%	▼
Friend/Family/Colleague Recommendation	25%	30%	27%	▼
Accommodation Websites/Apps	11%	18%	25%	▲
Internet Search (Bing, Google, etc.)	13%	23%	18%	▼
Mapping Websites (Google Maps, etc.)	5%	17%	14%	▼
No Resource Used	24%	30%	20%	▼

AVERAGE EXPENDITURES PER PERSON PER DAY

	2019	2020	2021	Change '21/'20
Avg. Expenditures (incl. transportation)	**$133.51**	**$126.47**	**$203.45**	**61%**
Avg. Expenditures (excl. transportation)	**$83.92**	**$88.10**	**$137.73**	**56%**
Lodging - Total	$54.59	$51.93	$69.50	34%
Lodging - Room	*$69.66*	*$59.31*	*$68.71*	*16%*
Lodging - Services (internet, etc.)	*$8.01*	*$1.38*	*$5.77*	*317%*
Transportation - Total	$49.59	$38.37	$65.72	71%
Transportation - Airfare	*$57.64*	*$46.33*	*$67.48*	*46%*
Transportation - Rental Car	*$36.09*	*$38.59*	*$86.97*	*125%*
Transportation - Other (taxi, gas, etc.)	*$10.58*	*$13.81*	*$19.23*	*39%*
Food & Beverage	$32.54	$35.17	$47.39	35%
Shopping	$13.18	$16.55	$30.70	86%
Entertainment & Recreation	$10.97	$7.00	$19.33	176%
Other Expenses	$4.04	$3.36	$5.59	67%

Source: DK 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

	2019	2020	2021	Change '21/'20
18 - 34 Years Old	22%	1%	17%	▲
35 - 49 Years Old	25%	24%	26%	▲
50 - 64 Years Old	33%	42%	33%	▼
65+ Years Old	20%	33%	24%	▼
Average Age	**50.4**	**57.5**	**51.9**	▼
Median Age	**51**	**57**	**52**	▼

HOUSEHOLD INCOME

	2019	2020	2021	Change '21/'20
Under $50,000	16%	16%	19%	▲
$50,000 - $74,999	17%	17%	14%	▼
$75,000 - $99,999	16%	28%	15%	▼
$100,000 - $149,999	23%	17%	19%	▲
Over $150,000	27%	22%	33%	▲
Average Household Income	**$117,500**	**$109,100**	**$127,100**	▲
Median Household Income	**$101,700**	**$89,700**	**$104,700**	▲

GENERATION

	2019	2020	2021	Change '21/'20
Millennials/Gen Z (Born 1981 or later)	26%	16%	28%	▲
GenX (Born 1965-1980)	30%	19%	31%	▲
Boomers (Born 1946 -1964)	38%	60%	38%	▼
Silent/GI (Born 1945 or earlier)	6%	5%	3%	▼

Source: DK 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

	2019	2020	2021	Change '21/'20
Leisure	**85%**	**93%**	**87%**	▼
Visit Friends/Relatives	27%	20%	63%	▲
Vacation/Getaway Weekend	28%	21%	0.3%	▼
Other Leisure	29%	52%	23%	▼
Business	**15%**	**7%**	**13%**	▲
Group Meetings	4%	1%	11%	▲
Transient Business	11%	6%	2%	▼

TRANSPORTATION TYPE

	2019	2020	2021	Change '21/'20
Air	11.7%	11.8%	6.6%	▼
Non-Air	88.3%	88.2%	93.4%	▲

SEASONALITY

	2019	2020	2021	Change '21/'20
Winter (Dec, Jan, Feb)	31%	24%	59%	▲
Spring (Mar, Apr, May)	28%	59%	22%	▼
Summer (Jun, Jul, Aug)	8%	3%	11%	▲
Fall (Sept, Oct, Nov)	32%	14%	8%	▼

TRAVEL PARTY COMPOSITION

	2019	2020	2021	Change '21/'20
One Male and One Female	46%	33%	50%	▲
One Adult	36%	51%	40%	▼
Three or More Adults	3%	13%	5%	▼
Families	6%	2%	4%	▲
Two Males or Two Females	9%	1%	1%	—
Average Party Size	**1.8**	**2.4**	**1.7**	▼

Source: DK 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

	2019	2020	2021	Change '21/'20
Georgia	16.8%	1.9%	40.9%	▲
Mississippi	0.0%	8.6%	9.4%	▲
Texas	2.6%	6.8%	7.5%	▲
Alabama	9.5%	8.2%	7.0%	▼
Pennsylvania	0.6%	3.5%	5.8%	▲

TOP ORIGIN DESIGNATED MARKET AREAS (DMAs)

	2019	2020	2021	Change '21/'20
Albany, GA	2.5%	0.0%	34.8%	▲
Houston, TX	0.9%	0.0%	6.9%	▲
Dothan, AL	6.6%	0.5%	5.1%	▲
Columbus-Tupelo-West Point, MS	0.0%	0.0%	5.1%	▲
Pittsburgh, PA	0.2%	0.0%	3.9%	▲

ACTIVITIES DURING TRIP

	2019	2020	2021	Change '21/'20
Shopping	9%	20%	36%	▲
Culinary/Dining Experience	19%	14%	35%	▲
Touring/Sightseeing	7%	7%	32%	-
Hunting	0%	0%	30%	▲
Visit Friends/Relatives	31%	26%	26%	-
Culinary - Typical Restaurant Dining	-	-	14%	-

LENGTH OF STAY

	2019	2020	2021	Change '21/'20
1-3 nights	88%	81%	88%	▲
4-7 nights	12%	16%	7%	▼
8+ nights	1%	3%	5%	▲
Average Nights in Florida	**2.2**	**2.4**	**2.9**	▲
Median Nights in Florida	**1.3**	**1.7**	**2.0**	▲

Source: DK 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

	2019	2020	2021	Change '21/'20
Paid	**69%**	**79%**	**87%**	▲
Hotel Paid	*53%*	*75%*	*73%*	▼
Non-Hotel Paid	*15%*	*4%*	*14%*	▲
Non-Paid	**31%**	**21%**	**13%**	▼

HOTEL LEVEL

	2019	2020	2021	Change '21/'20
High End	**11%**	**9%**	**5%**	▼
Luxury	0%	0%	0%	—
Upscale	11%	9%	5%	▼
Mid-Level	**49%**	**73%**	**23%**	▼
Upper Moderate	8%	10%	10%	—
Moderate	41%	63%	14%	▼
Economy	**40%**	**18%**	**72%**	▲
Lower Moderate	16%	3%	62%	▲
Budget	25%	15%	10%	▼

ACCOMMODATION RESERVATION TYPE

	2019	2020	2021	Change '21/'20
Made Reservation	**92%**	**92%**	**42%**	▼
Online	59%	77%	28%	▼
Hotel Chain Website	*36%*	*23%*	*17%*	▼
Non-Hotel Accommodations Site/App	*3%*	*3%*	*7%*	▲
Travel Website	*5%*	*51%*	*4%*	▼
Hotel Mobile App	*15%*	*0%*	*0%*	—
Called Directly	13%	12%	7%	▼
Travel Agent	3%	4%	7%	▲
As Part of a Package	1%	0%	0%	—
Other	16%	0%	0.4%	—
No Reservation	**8%**	**8%**	**58%**	▲

Source: DK 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

	2019	2020	2021	Change '21/'20
Less than 1 week	7%	18%	14%	▼
1-3 weeks	31%	21%	22%	—
1 month	31%	12%	40%	▲
2-3 months	16%	16%	17%	—
4-5 months	10%	3%	2%	—
6 months or more	5%	30%	5%	▼

TRIP PLANNING RESOURCES USED

	2019	2020	2021	Change '21/'20
Used Resource	**76%**	**55%**	**38%**	▼
Friend/Family/Colleague Recommendation	18%	20%	29%	▲
Past Experience	32%	48%	24%	▼
Accommodation Websites / Apps	17%	20%	23%	▲
Attraction Websites	0.2%	14%	18%	▲
Mapping Websites (Google Maps, etc.)	10%	12%	16%	▲
No Resource Used	24%	45%	62%	▲

AVERAGE EXPENDITURES PER PERSON PER DAY

	2019	2020	2021	Change '21/'20
Avg. Expenditures (incl. transportation)	**$100.52**	**$113.56**	**$164.47**	**45%**
Avg. Expenditures (excl. transportation)	**$63.08**	**$45.10**	**$124.85**	**177%**
Lodging - Total	$35.45	$26.55	$50.96	92%
Lodging - Room	*$49.77*	*$32.44*	*$52.84*	*63%*
Lodging - Services (internet, etc.)	*$0.26*	*$0.54*	*$0.82*	*51%*
Transportation - Total	$37.44	$68.46	$39.62	-42%
Transportation - Airfare	*$69.46*	*$170.20*	*$112.85*	*-34%*
Transportation - Rental Car	*$29.17*	*$77.55*	*$62.18*	*-20%*
Transportation - Other (taxi, gas, etc.)	*$13.16*	*$8.33*	*$16.75*	*101%*
Food & Beverage	$28.70	$13.49	$37.34	177%
Shopping	$5.92	$3.99	$36.67	819%
Entertainment & Recreation	$5.41	$1.51	$8.33	451%
Other Expenses	$3.38	$3.99	$4.12	3%

Source: DK 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

	2019	2020	2021	Change '21/'20
18 - 34 Years Old	23%	8%	7%	—
35 - 49 Years Old	21%	1%	23%	▲
50 - 64 Years Old	33%	62%	51%	▼
65+ Years Old	23%	28%	19%	▼
Average Age	**49.6**	**56.9**	**57.6**	▲
Median Age	**54**	**52**	**63**	▲

HOUSEHOLD INCOME

	2019	2020	2021	Change '21/'20
Under $50,000	31%	17%	50%	▲
$50,000 - $74,999	13%	45%	12%	▼
$75,000 - $99,999	20%	27%	9%	▼
$100,000 - $149,999	6%	5%	12%	▲
Over $150,000	29%	7%	17%	▲
Average Household Income	**$112,000**	**$81,800**	**$75,200**	▼
Median Household Income	**$81,800**	**$70,800**	**$53,600**	▼

GENERATION

	2019	2020	2021	Change '21/'20
Millennials/Gen Z (Born 1981 or later)	32%	9%	11%	▲
GenX (Born 1965-1980)	19%	42%	20%	▼
Boomers (Born 1946 -1964)	47%	46%	66%	▲
Silent/GI (Born 1945 or earlier)	2%	3%	2%	—

Source: DK 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

	2019	2020	2021	Change '21/'20
Leisure	**93%**	**96%**	**85%**	▼
Visit Friends/Relatives	36%	26%	37%	▲
Vacation/Getaway Weekend	34%	57%	20%	▼
Other Leisure	23%	13%	28%	▲
Business	**7%**	**4%**	**15%**	▲
Transient Business	3%	1%	7%	▲
Group Meetings	4%	3%	7%	▲

TRANSPORTATION TYPE

	2019	2020	2021	Change '21/'20
Air	23.2%	19.2%	16.9%	▼
Non-Air	76.8%	80.8%	83.1%	—

SEASONALITY

	2019	2020	2021	Change '21/'20
Winter (Dec, Jan, Feb)	19%	47%	20%	▼
Spring (Mar, Apr, May)	22%	17%	28%	▲
Summer (Jun, Jul, Aug)	42%	17%	30%	▲
Fall (Sept, Oct, Nov)	17%	19%	22%	▲

TRAVEL PARTY COMPOSITION

	2019	2020	2021	Change '21/'20
One Adult	33%	25%	53%	▲
One Man and One Woman	39%	60%	29%	▼
Two Men or Two Women	4%	3%	7%	▲
Three or More Adults	9%	7%	6%	—
Families	16%	4%	4%	—
Average Party Size	**2.1**	**1.9**	**1.7**	▼

Source: DK Shifflet; Arrows indicate change of at least 2 percentage points; Profile based on small sample size

DOMESTIC VISITORS TO NORTHEAST FL

TOP ORIGIN STATES

	2019	2020	2021	Change '21/'20
Georgia	27.7%	27.1%	12.8%	▼
Michigan	1.0%	2.6%	9.3%	▲
South Carolina	2.7%	5.5%	7.2%	▲
Pennsylvania	5.3%	2.6%	6.7%	▲
Texas	9.4%	4.7%	6.0%	▲

TOP ORIGIN DESIGNATED MARKET AREAS (DMAs)

	2019	2020	2021	Change '21/'20
Atlanta, GA	13.4%	16.2%	6.7%	▼
Pittsburgh, PA	1.6%	0.1%	6.0%	▲
New York, NY	7.6%	5.1%	5.8%	▲
Dallas-Fort Worth, TX	5.8%	0.7%	4.6%	▲
Chicago, IL	1.3%	2.1%	4.0%	▲

ACTIVITIES DURING TRIP

	2019	2020	2021	Change '21/'20
Beach/Waterfront	54%	43%	32%	▼
Visit Friends/Relatives	47%	38%	17%	▼
Historic Sites	25%	20%	15%	▼
Shopping	25%	21%	13%	▼
Culinary/Dining Experience	34%	26%	13%	▼
Festival/Fairs	6%	6%	11%	▲

LENGTH OF STAY

	2019	2020	2021	Change '21/'20
1-3 nights	68%	64%	54%	▼
4-7 nights	27%	25%	38%	▲
8+ nights	5%	11%	8%	▼
Average Nights in Florida	**3.2**	**4.9**	**4.3**	▼
Median Nights in Florida	**2.1**	**2.0**	**2.9**	▲

Source: DK 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

	2019	2020	2021	Change '21/'20
Paid	**59%**	**74%**	**69%**	▼
Hotel Paid	*31%*	*54%*	*43%*	▼
Non-Hotel Paid	*28%*	*20%*	*26%*	▲
Non-Paid	**41%**	**26%**	**31%**	▲

HOTEL LEVEL

	2019	2020	2021	Change '21/'20
High End	**18%**	**14%**	**19%**	▲
Luxury	3%	1%	7%	▲
Upscale	15%	13%	12%	—
Mid-Level	**65%**	**62%**	**61%**	—
Upper Moderate	16%	7%	18%	▲
Moderate	48%	55%	42%	▼
Economy	**18%**	**24%**	**20%**	▼
Lower Moderate	6%	16%	7%	▼
Budget	12%	8%	13%	▲

ACCOMMODATION RESERVATION TYPE

	2019	2020	2021	Change '21/'20
Made Reservation	**90%**	**94%**	**90%**	▼
Online	52%	75%	71%	▼
Hotel Chain Website	*41%*	*45%*	*43%*	▼
Travel Website	*5%*	*28%*	*16%*	▼
Non-Hotel Accommodations Site/App	*4%*	*3%*	*13%*	▲
Hotel Mobile App	*3%*	*0%*	*0%*	—
Called Directly	16%	18%	13%	▼
As Part of a Package	10%	0%	0%	—
Travel Agent	3%	0%	3%	▲
Other	9%	1%	4%	▲
No Reservation	**10%**	**6%**	**10%**	▲

Source: DK 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

	2019	2020	2021	Change '21/'20
Less than 1 week	13%	7%	14%	▲
1-3 weeks	20%	25%	25%	—
1 month	22%	19%	15%	▼
2-3 months	19%	29%	16%	▼
4-5 months	10%	6%	19%	▲
6 months or more	15%	14%	11%	▼

TRIP PLANNING RESOURCES USED

	2019	2020	2021	Change '21/'20
Used Resource	**83%**	**68%**	**78%**	▲
Past Experience	36%	52%	46%	▼
Friend/Family/Colleague Recommendation	33%	23%	23%	—
Accommodation Websites / Apps	16%	16%	14%	▼
Destination Websites	10%	16%	13%	▼
Internet Search (Bing, Google, etc.)	26%	29%	11%	▼
No Resource Used	**17%**	**32%**	**22%**	▼

AVERAGE EXPENDITURES PER PERSON PER DAY

	2019	2020	2021	Change '21/'20
Avg. Expenditures (incl. transportation)	**$122.41**	**$133.67**	**$156.57**	**17%**
Avg. Expenditures (excl. transportation)	**$84.03**	**$101.09**	**$107.35**	**6%**
Lodging - Total	$48.96	$56.30	$85.65	52%
Lodging - Room	*$55.90*	*$56.56*	*$87.79*	*55%*
Lodging - Services (internet, etc)	*$1.69*	*$1.58*	*$2.05*	*30%*
Transportation - Total	$38.38	$32.58	$49.22	51%
Transportation - Airfare	*$48.16*	*$43.82*	*$106.49*	*143%*
Transportation - Rental Car	*$42.51*	*$46.09*	*$92.19*	*100%*
Transportation - Other (taxi, gas, etc.)	*$15.14*	*$16.86*	*$17.27*	*2%*
Food & Beverage	$31.17	$38.76	$30.18	-22%
Shopping	$14.28	$16.13	$12.07	-25%
Entertainment & Recreation	$12.22	$5.55	$11.40	106%
Other Expenses	$2.15	$3.86	$7.15	85%

Source: DK 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

	2019	2020	2021	Change '21/'20
18 - 34 Years Old	19%	11%	20%	▲
35 - 49 Years Old	32%	8%	20%	▲
50 - 64 Years Old	26%	40%	26%	▼
65+ Years Old	22%	41%	34%	▼
Average Age	**50.4**	**58.9**	**52.9**	▼
Median Age	**48**	**62**	**56**	▼

HOUSEHOLD INCOME

	2019	2020	2021	Change '21/'20
Under $50,000	29%	28%	34%	▲
$50,000 - $74,999	15%	10%	14%	▲
$75,000 - $99,999	16%	22%	7%	▼
$100,000 - $149,999	20%	21%	16%	▼
Over $150,000	19%	18%	29%	▲
Average Household Income	**$104,200**	**$102,700**	**$114,800**	▲
Median Household Income	**$84,900**	**$87,800**	**$79,600**	▼

GENERATION

	2019	2020	2021	Change '21/'20
Millennials/Gen Z (Born 1981 or later)	21%	12%	34%	▲
GenX (Born 1965-1980)	36%	16%	16%	—
Boomers (Born 1946 -1964)	36%	66%	41%	▼
Silent/GI (Born 1945 or earlier)	7%	6%	9%	▲

Source: DK 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

	2019	2020	2021	Change '21/'20
Leisure	**96%**	**94%**	**94%**	—
Vacation/Getaway Weekend	70%	74%	62%	▼
Visit Friends/Relatives	17%	10%	9%	—
Other Leisure	9%	10%	24%	▲
Business	**4%**	**6%**	**6%**	—
Transient Business	2%	6%	3%	▼
Group Meetings	2%	0%	2%	▲

TRANSPORTATION TYPE

	2019	2020	2021	Change '21/'20
Air	8.0%	5.1%	9.4%	▲
Non-Air	92.0%	94.9%	90.6%	▼

SEASONALITY

	2019	2020	2021	Change '21/'20
Winter (Dec, Jan, Feb)	13%	19%	14%	▼
Spring (Mar, Apr, May)	18%	13%	19%	▲
Summer (Jun, Jul, Aug)	49%	50%	50%	—
Fall (Sept, Oct, Nov)	20%	19%	17%	▼

TRAVEL PARTY COMPOSITION

	2019	2020	2021	Change '21/'20
One Male and One Female	39%	43%	49%	▲
One Adult	16%	29%	20%	▼
Families	32%	20%	18%	▼
Three or More Adults	8%	9%	9%	—
Two Males or Two Females	5%	0%	4%	▲
Average Party Size	**2.5**	**2.3**	**2.5**	▲

Source: DK Shifflet; Arrows indicate change of at least 2 percentage points; Profile based on small sample size

DOMESTIC VISITORS TO NORTHWEST FL

TOP ORIGIN STATES

	2019	2020	2021	Change '21/'20
Alabama	11.4%	13.3%	15.7%	▲
Texas	13.8%	9.6%	11.5%	▲
Tennessee	16.6%	15.6%	10.5%	▼
Georgia	12.1%	9.5%	9.6%	—
Missouri	7.0%	20.4%	7.7%	▼

TOP ORIGIN DESIGNATED MARKET AREAS (DMAs)

	2019	2020	2021	Change '21/'20
Birmingham, AL	6.3%	6.7%	9.6%	▲
Atlanta, GA	10.4%	10.8%	7.2%	▼
Dallas-Fort Worth, TX	1.5%	3.8%	7.1%	▲
Nashville, TN	9.6%	4.3%	6.5%	▲
New Orleans, LA	3.1%	1.4%	4.2%	▲

ACTIVITIES DURING TRIP

	2019	2020	2021	Change '21/'20
Beach/Waterfront	82%	65%	70%	▲
Culinary/Dining Experience	41%	27%	28%	-
Shopping	38%	24%	27%	▲
Culinary - Typical Restaurant Dining	-	-	26%	-
Touring/Sightseeing	24%	7%	20%	▲
Visit Friends/Relatives	22%	9%	12%	▲

LENGTH OF STAY

	2019	2020	2021	Change '21/'20
1-3 nights	47%	38%	39%	—
4-7 nights	49%	52%	50%	▼
8+ nights	4%	10%	11%	—
Average Nights in Florida	**4.3**	**5.4**	**5.1**	▼
Median Nights in Florida	**2.8**	**3.0**	**3.5**	▲

Source: DK 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

	2019	2020	2021	Change '21/'20
Paid	**76%**	**91%**	**88%**	▼
Hotel Paid	*31%*	*45%*	*31%*	▼
Non-Hotel Paid	*45%*	*45%*	*58%*	▲
Non-Paid	**24%**	**9%**	**12%**	▲

HOTEL LEVEL

	2019	2020	2021	Change '21/'20
High End	**22%**	**10%**	**19%**	▲
Luxury	1%	1%	2%	—
Upscale	21%	9%	17%	▲
Mid-Level	**64%**	**39%**	**55%**	▲
Upper Moderate	24%	16%	21%	▲
Moderate	40%	23%	34%	▲
Economy	**14%**	**51%**	**26%**	▼
Lower Moderate	12%	49%	17%	▼
Budget	2%	2%	9%	▲

ACCOMMODATION RESERVATION TYPE

	2019	2020	2021	Change '21/'20
Made Reservation	**94%**	**87%**	**95%**	▲
Online	62%	56%	73%	▲
Hotel Chain Website	*28%*	*32%*	*31%*	—
Non-Hotel Accommodations Site/App	*7%*	*5%*	*23%*	▲
Travel Website	*25%*	*19%*	*19%*	—
Hotel Mobile App	*2%*	*0%*	*0%*	—
Called Directly	18%	25%	17%	▼
Travel Agent	1%	4%	4%	—
As Part of a Package	4%	0%	0%	—
Other	9%	1%	1%	—
No Reservation	**6%**	**13%**	**5%**	▼

Source: DK 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

	2019	2020	2021	Change '21/'20
Less than 1 week	5%	12%	15%	▲
1-3 weeks	26%	22%	19%	▼
1 month	21%	16%	13%	▼
2-3 months	22%	21%	17%	▼
4-5 months	6%	22%	9%	▼
6 months or more	20%	8%	27%	▲

TRIP PLANNING RESOURCES USED

	2019	2020	2021	Change '21/'20
Used Resource	**74%**	**76%**	**79%**	▲
Past Experience	29%	21%	49%	▲
Accommodation Websites / Apps	16%	24%	28%	▲
Internet Search (Bing, Google, etc.)	18%	37%	25%	▼
Friend/Family/Colleague Recommendation	16%	37%	18%	▼
Mapping Websites (Google Maps, etc.)	7%	21%	14%	▼
No Resource Used	**26%**	**24%**	**21%**	▼

AVERAGE EXPENDITURES PER PERSON PER DAY

	2019	2020	2021	Change '21/'20
Avg. Expenditures (incl. transportation)	**$137.02**	**$126.17**	**$158.87**	**26%**
Avg. Expenditures (excl. transportation)	**$111.61**	**$103.42**	**$126.01**	**22%**
Lodging - Total	$60.35	$47.31	$55.56	17%
Lodging - Room	*$68.16*	*$46.85*	*$60.34*	*29%*
Lodging - Services (internet, etc.)	*$2.47*	*$1.19*	*$1.56*	*31%*
Transportation - Total	$25.70	$22.75	$32.87	44%
Transportation - Airfare	*$53.58*	*$37.82*	*$90.77*	*140%*
Transportation - Rental Car	*$39.58*	*$38.15*	*$68.30*	*79%*
Transportation - Other (taxi, gas, etc.)	*$13.39*	*$17.41*	*$15.86*	*-9%*
Food & Beverage	$36.99	$44.21	$45.62	3%
Shopping	$17.39	$10.63	$20.06	89%
Entertainment & Recreation	$12.78	$6.45	$14.05	118%
Other Expenses	$2.46	$2.06	$4.64	125%

Source: DK 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

	2019	2020	2021	Change '21/'20
18 - 34 Years Old	26%	6%	19%	▲
35 - 49 Years Old	30%	37%	24%	▼
50 - 64 Years Old	30%	27%	36%	▲
65+ Years Old	14%	30%	21%	▼
Average Age	**47.6**	**52.7**	**51.0**	▼
Median Age	**45**	**49**	**50**	▲

HOUSEHOLD INCOME

	2019	2020	2021	Change '21/'20
Under $50,000	20%	40%	26%	▼
$50,000 - $74,999	21%	17%	24%	▲
$75,000 - $99,999	23%	8%	16%	▲
$100,000 - $149,999	20%	14%	18%	▲
Over $150,000	16%	20%	16%	▼
Average Household Income	**$96,900**	**$85,300**	**$94,400**	▲
Median Household Income	**$85,900**	**$64,400**	**$75,300**	▲

GENERATION

	2019	2020	2021	Change '21/'20
Millennials/Gen Z (Born 1981 or later)	34%	22%	24%	▲
GenX (Born 1965-1980)	29%	34%	38%	▲
Boomers (Born 1946 -1964)	33%	41%	36%	▼
Silent/GI (Born 1945 or earlier)	4%	4%	2%	▼

Source: DK 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

	2019	2020	2021	Change '21/'20
Leisure	**94%**	**88%**	**88%**	—
Vacation/Getaway Weekend	57%	60%	32%	▼
Visit Friends/Relatives	22%	21%	18%	▼
Other Leisure	15%	7%	38%	▲
Business	**6%**	**12%**	**12%**	—
Group Meetings	3%	8%	9%	—
Transient Business	3%	4%	4%	—

TRANSPORTATION TYPE

	2019	2020	2021	Change '21/'20
Air	42.8%	46.9%	31.6%	▼
Non-Air	57.2%	53.1%	68.4%	▲

SEASONALITY

	2019	2020	2021	Change '21/'20
Winter (Dec, Jan, Feb)	30%	52%	29%	▼
Spring (Mar, Apr, May)	23%	22%	24%	▲
Summer (Jun, Jul, Aug)	28%	8%	25%	▲
Fall (Sept, Oct, Nov)	19%	17%	22%	▲

TRAVEL PARTY COMPOSITION

	2019	2020	2021	Change '21/'20
One Adult	34%	34%	46%	▲
One Man and One Woman	43%	44%	31%	▼
Families	11%	5%	14%	▲
Two Men or Two Women	5%	12%	5%	▼
At Least Three Adults	7%	6%	4%	▼
Average Party Size	**2.0**	**1.9**	**1.9**	—

Source: DK Shifflet; Arrows indicate change of at least 2 percentage points; Profile based on small sample size

DOMESTIC VISITORS TO SOUTHEAST FL

TOP ORIGIN STATES

	2019	2020	2021	Change '21/'20
New York	16.1%	10.6%	10.4%	—
Alabama	1.4%	1.8%	9.5%	▲
Georgia	8.4%	5.1%	7.3%	▲
Texas	5.9%	7.4%	7.3%	—
Ohio	3.0%	2.4%	5.8%	▲

TOP ORIGIN DESIGNATED MARKET AREAS (DMAs)

	2019	2020	2021	Change '21/'20
New York, NY	18.1%	10.6%	13.1%	▲
Birmingham, AL	0.5%	0.1%	8.3%	▲
Atlanta, GA	6.4%	5.0%	5.8%	▲
Boston, MA	4.6%	3.3%	5.6%	▲
Chicago, IL	4.2%	5.1%	5.3%	—

ACTIVITIES DURING TRIP

	2019	2020	2021	Change '21/'20
Beach/Waterfront	56%	41%	46%	▲
Culinary/Dining Experience	34%	25%	23%	▼
Shopping	31%	21%	20%	—
Visit Friends/Relatives	30%	29%	18%	▼
Culinary - Typical Restaurant Dining	-	-	23%	-
Boating/Sailing	6%	7%	14%	▲

LENGTH OF STAY

	2019	2020	2021	Change '21/'20
1-3 nights	60%	54%	61%	▲
4-7 nights	33%	35%	32%	▼
8+ nights	7%	11%	8%	▼
Average Nights in Florida	**3.7**	**4.7**	**4.3**	▼
Median Nights in Florida	**2.5**	**2.9**	**2.2**	▼

Source: DK 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

	2019	2020	2021	Change '21/'20
Paid	**67%**	**74%**	**80%**	▲
Hotel Paid	*42%*	*56%*	*41%*	▼
Non-Hotel Paid	*25%*	*18%*	*39%*	▲
Non-Paid	**33%**	**26%**	**20%**	▼

HOTEL LEVEL

	2019	2020	2021	Change '21/'20
High End	**52%**	**36%**	**56%**	▲
Luxury	13%	11%	20%	▲
Upscale	39%	25%	35%	▲
Mid-Level	**40%**	**45%**	**30%**	▼
Upper Moderate	17%	33%	13%	▼
Moderate	22%	12%	17%	▲
Economy	**9%**	**18%**	**14%**	▼
Lower Moderate	4%	17%	7%	▼
Budget	4%	2%	8%	▲

ACCOMMODATION RESERVATION TYPE

	2019	2020	2021	Change '21/'20
Made Reservation	**92%**	**97%**	**91%**	▼
Online	52%	76%	70%	▼
Hotel Chain Website	*31%*	*49%*	*38%*	▼
Non-Hotel Accommodations Site/App	*3%*	*3%*	*21%*	▲
Travel Website	*14%*	*24%*	*11%*	▼
Hotel Mobile App	*4%*	*0%*	*0%*	—
Called Directly	13%	15%	16%	—
Travel Agent	6%	3%	4%	—
As Part of a Package	10%	0%	0%	—
Other	11%	4%	1%	▼
No Reservation	**8%**	**3%**	**9%**	▲

Source: DK 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

	2019	2020	2021	Change '21/'20
Less than 1 week	4%	4%	11%	▲
1-3 weeks	18%	28%	24%	▼
1 month	16%	21%	26%	▲
2-3 months	30%	22%	24%	▲
4-5 months	13%	6%	6%	—
6 months or more	18%	19%	9%	▼

TRIP PLANNING RESOURCES USED

	2019	2020	2021	Change '21/'20
Used Resource	**76%**	**76%**	**80%**	▲
Accommodation Websites / Apps	21%	23%	28%	▲
Past Experience	30%	37%	28%	▼
Friend/Family/Colleague Recommendation	17%	29%	22%	▼
Internet Search (Bing, Google, etc.)	18%	31%	18%	▼
Travel Booking Website (Expedia, etc.)	9%	18%	15%	▼
No Resource Used	**24%**	**24%**	**20%**	▼

AVERAGE EXPENDITURES PER PERSON PER DAY

	2019	2020	2021	Change '21/'20
Avg. Expenditures (incl. transportation)	**$191.44**	**$222.85**	**$253.50**	**14%**
Avg. Expenditures (excl. transportation)	**$134.95**	**$154.74**	**$179.09**	**16%**
Lodging - Total	$91.78	$89.86	$96.38	7%
Lodging - Room	*$96.96*	*$88.41*	*$95.96*	*9%*
Lodging - Services (internet, etc.)	*$15.42*	*$6.15*	*$8.31*	*35%*
Transportation - Total	$56.48	$68.10	$74.41	9%
Transportation - Airfare	*$68.00*	*$69.27*	*$73.98*	*7%*
Transportation - Rental Car	*$37.92*	*$43.78*	*$61.55*	*41%*
Transportation - Other (taxi, gas, etc.)	*$12.81*	*$18.89*	*$24.29*	*29%*
Food & Beverage	$41.69	$56.55	*$50.87*	-10%
Shopping	$21.15	$16.37	$32.45	98%
Entertainment & Recreation	$16.33	$16.02	$24.78	55%
Other Expenses	$4.69	$7.52	$10.20	36%

Source: DK 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

	2019	2020	2021	Change '21/'20
18 - 34 Years Old	22%	11%	25%	▲
35 - 49 Years Old	23%	26%	27%	—
50 - 64 Years Old	30%	39%	27%	▼
65+ Years Old	25%	24%	21%	▼
Average Age	**51.1**	**52.9**	**48.8**	▼
Median Age	**52**	**54**	**47**	▼

HOUSEHOLD INCOME

	2019	2020	2021	Change '21/'20
Under $50,000	20%	18%	27%	▲
$50,000 - $74,999	10%	7%	13%	▲
$75,000 - $99,999	15%	22%	11%	▼
$100,000 - $149,999	21%	22%	21%	—
Over $150,000	32%	31%	28%	▼
Average Household Income	**$131,500**	**$133,900**	**$114,900**	▼
Median Household Income	**$108,400**	**$108,500**	**$97,100**	▼

GENERATION

	2019	2020	2021	Change '21/'20
Millennials/Gen Z (Born 1981 or later)	28%	22%	36%	▲
GenX (Born 1965-1980)	25%	31%	25%	▼
Boomers (Born 1946 -1964)	40%	41%	34%	▼
Silent/GI (Born 1945 or earlier)	7%	6%	4%	▼

Source: DK 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

	2019	2020	2021	Change '21/'20
Leisure	**95%**	**99%**	**89%**	▼
Vacation/Getaway Weekend	50%	53%	44%	▼
Visit Friends/Relatives	33%	41%	23%	▼
Other Leisure	11%	5%	22%	▲
Business	**5%**	**1%**	**11%**	▲
Transient Business	2%	1%	8%	▲
Group Meetings	3%	1%	4%	▲

TRANSPORTATION TYPE

	2019	2020	2021	Change '21/'20
Air	42.3%	28.3%	30.1%	▲
Non-Air	57.7%	71.7%	69.9%	▼

SEASONALITY

	2019	2020	2021	Change '21/'20
Winter (Dec, Jan, Feb)	30%	58%	33%	▼
Spring (Mar, Apr, May)	30%	15%	25%	▲
Summer (Jun, Jul, Aug)	22%	10%	18%	▲
Fall (Sept, Oct, Nov)	17%	17%	24%	▲

TRAVEL PARTY COMPOSITION

	2019	2020	2021	Change '21/'20
One Male and One Female	47%	65%	48%	▼
One Adult	31%	24%	34%	▲
Three or More Adults	8%	4%	8%	▲
Families	10%	4%	7%	▲
Two Males or Two Females	4%	3%	4%	—
Average Party Size	**2.0**	**2.0**	**2.0**	—

Source: DK Shifflet; Arrows indicate change of at least 2 percentage points; Profile based on small sample size

DOMESTIC VISITORS TO SOUTHWEST FL

TOP ORIGIN STATES

	2019	2020	2021	Change '21/'20
New York	11.1%	6.5%	13.2%	▲
Indiana	4.7%	2.7%	7.6%	▲
Michigan	7.4%	4.5%	7.5%	▲
New Jersey	4.3%	4.0%	7.2%	▲
Ohio	9.4%	6.7%	7.2%	—

TOP ORIGIN DESIGNATED MARKET AREAS (DMAs)

	2019	2020	2021	Change '21/'20
New York, NY	9.9%	6.0%	9.1%	▲
Philadelphia, PA	2.4%	2.1%	6.4%	▲
Atlanta, GA	3.1%	1.0%	6.0%	▲
Chicago, IL	3.7%	17.5%	5.7%	▼
Boston, MA	6.0%	3.5%	4.7%	▲

ACTIVITIES DURING TRIP

	2019	2020	2021	Change '21/'20
Beach/Waterfront	62%	55%	56%	—
Visit Friends/Relatives	44%	45%	28%	▼
Culinary - Typical Restaurant Dining	-	-	27%	-
Shopping	31%	27%	25%	▼
Culinary/Dining Experience	42%	31%	24%	▼
Touring/Sightseeing	19%	20%	13%	▼

LENGTH OF STAY

	2019	2020	2021	Change '21/'20
1-3 nights	36%	42%	41%	—
4-7 nights	49%	33%	34%	—
8+ nights	15%	25%	25%	—
Average Nights in Florida	**5.6**	**8.0**	**7.2**	▼
Median Nights in Florida	**3.9**	**3.5**	**3.6**	▲

Source: DK 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

	2019	2020	2021	Change '21/'20
Paid	**53%**	**60%**	**70%**	▲
Hotel Paid	*24%*	*26%*	*29%*	▲
Non-Hotel Paid	*29%*	*34%*	*41%*	▲
Non-Paid	**47%**	**40%**	**30%**	▼

HOTEL LEVEL

	2019	2020	2021	Change '21/'20
High End	**29%**	**32%**	**45%**	▲
Luxury	3%	2%	16%	▲
Upscale	25%	30%	29%	—
Mid-Level	**54%**	**36%**	**48%**	▲
Upper Moderate	15%	15%	30%	▲
Moderate	39%	21%	18%	▼
Economy	**17%**	**32%**	**7%**	▼
Lower Moderate	5%	22%	4%	▼
Budget	13%	10%	3%	▼

ACCOMMODATION RESERVATION TYPE

	2019	2020	2021	Change '21/'20
Made Reservation	**91%**	**91%**	**92%**	—
Online	50%	53%	61%	▲
Hotel Chain Website	*24%*	*36%*	*35%*	—
Travel Website	*18%*	*16%*	*14%*	▼
Non-Hotel Accommodations Site/App	*5%*	*1%*	*12%*	▲
Hotel Mobile App	*3%*	*0%*	*0%*	—
Called Directly	16%	29%	25%	▼
Travel Agent	3%	2%	3%	—
As Part of a Package	12%	0.5%	0%	—
Other	10%	6%	3%	▼
No Reservation	**9%**	**9%**	**8%**	—

Source: DK 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

	2019	2020	2021	Change '21/'20
Less than 1 week	7%	8%	7%	—
1-3 weeks	18%	8%	12%	▲
1 month	13%	18%	26%	▲
2-3 months	36%	27%	28%	—
4-5 months	9%	12%	6%	▼
6 months or more	17%	26%	22%	▼

TRIP PLANNING RESOURCES USED

	2019	2020	2021	Change '21/'20
Used Resource	**76%**	**74%**	**67%**	▼
Past Experience	36%	56%	48%	▼
Accommodation Websites / Apps	12%	20%	28%	▲
Internet Search (Bing, Google, etc.)	18%	16%	18%	▲
Friend/Family/Colleague Recommendation	30%	24%	15%	▼
Guest Review Websites (TripAdvisor, etc.)	9%	6%	11%	▲
No Resource Used	**24%**	**26%**	**33%**	▲

AVERAGE EXPENDITURES PER PERSON PER DAY

	2019	2020	2021	Change '21/'20
Avg. Expenditures (incl. transportation)	**$139.15**	**$154.62**	**$146.11**	**-6%**
Avg. Expenditures (excl. transportation)	**$97.21**	**$126.41**	**$111.08**	**-12%**
Lodging - Total	$61.38	$69.59	$93.99	35%
Lodging - Room	*$84.50*	*$74.98*	*$98.89*	*32%*
Lodging - Services (internet, etc.)	*$2.89*	*$3.45*	*$1.15*	*-67%*
Transportation - Total	$41.94	$28.21	$35.03	24%
Transportation - Airfare	*$48.39*	*$29.03*	*$53.52*	*84%*
Transportation - Rental Car	*$33.25*	*$37.41*	*$55.82*	*49%*
Transportation - Other (taxi, gas, etc.)	*$9.54*	*$10.63*	*$9.70*	*-9%*
Food & Beverage	$37.25	$37.24	$40.75	9%
Shopping	$16.18	$15.99	$13.72	-14%
Entertainment & Recreation	$13.81	$26.22	$9.80	-63%
Other Expenses	$2.51	$4.71	$3.34	-29%

Source: DK 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

	2019	2020	2021	Change '21/'20
18 - 34 Years Old	18%	10%	11%	—
35 - 49 Years Old	19%	8%	15%	▲
50 - 64 Years Old	30%	31%	34%	▲
65+ Years Old	33%	51%	40%	▼
Average Age	**54.4**	**60.9**	**56.7**	▼
Median Age	**56**	**64**	**61**	▼

HOUSEHOLD INCOME

	2019	2020	2021	Change '21/'20
Under $50,000	14%	10%	18%	▲
$50,000 - $74,999	14%	20%	18%	▼
$75,000 - $99,999	14%	13%	14%	—
$100,000 - $149,999	31%	29%	22%	▼
Over $150,000	27%	28%	28%	—
Average Household Income	**$126,600**	**$123,700**	**$124,200**	▲
Median Household Income	**$113,300**	**$112,100**	**$99,500**	▼

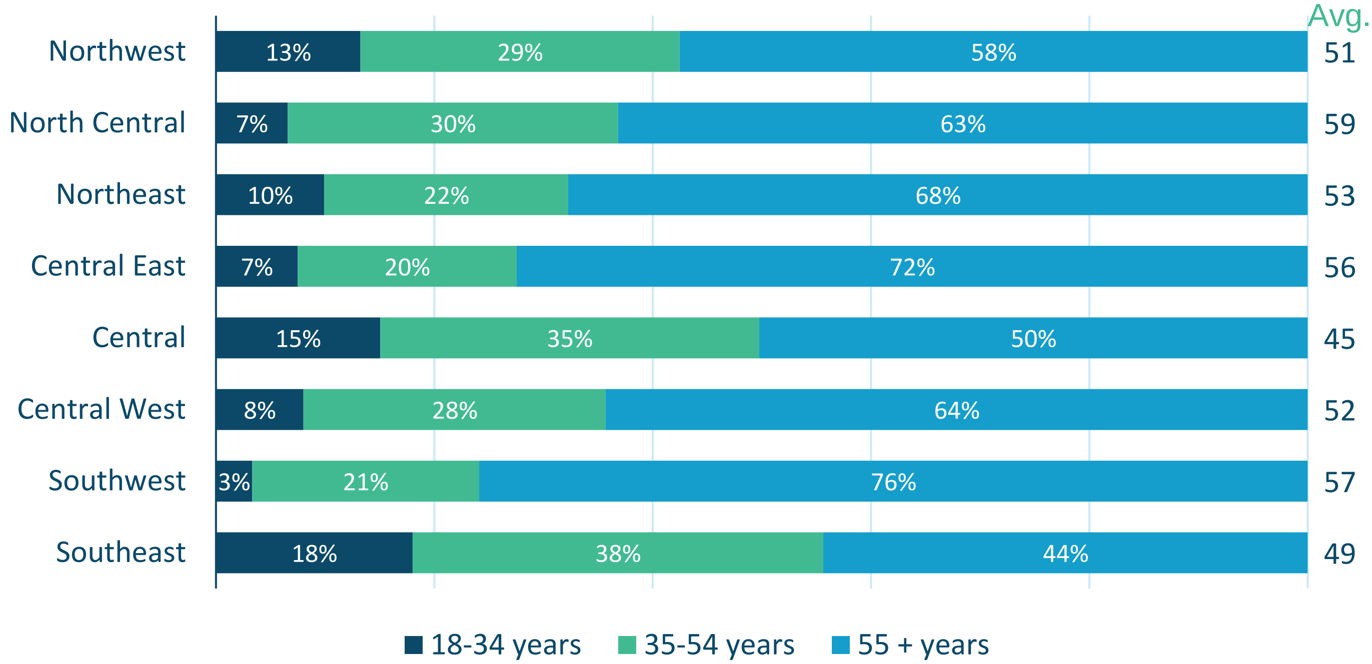
GENERATION

	2019	2020	2021	Change '21/'20
Millennials/Gen Z (Born 1981 or later)	21%	11%	19%	▲
GenX (Born 1965-1980)	25%	14%	21%	▲
Boomers (Born 1946 -1964)	43%	63%	57%	▼
Silent/GI (Born 1945 or earlier)	10%	12%	3%	▼

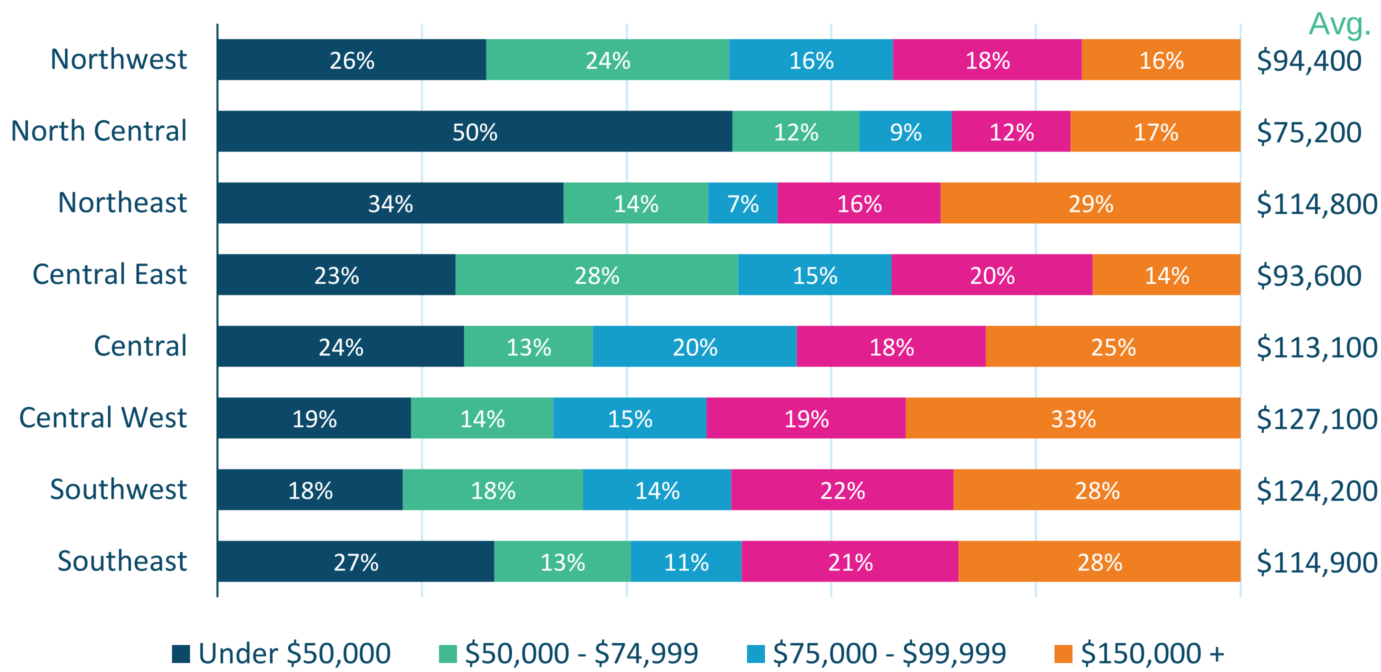
Source: DK Shifflet; Arrows indicate change of at least 2 percentage points; Profile based on small sample size

REGIONAL COMPARISON

AGE BY FLORIDA REGION



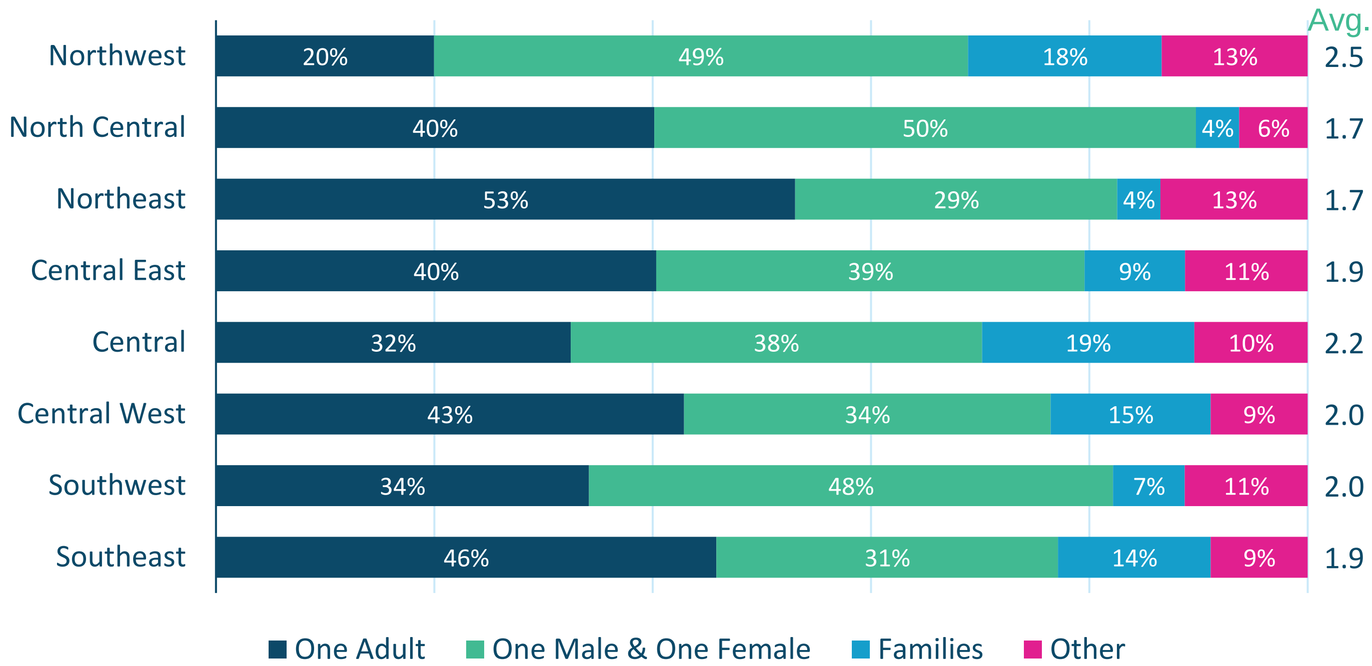
HOUSEHOLD INCOME BY FLORIDA REGION



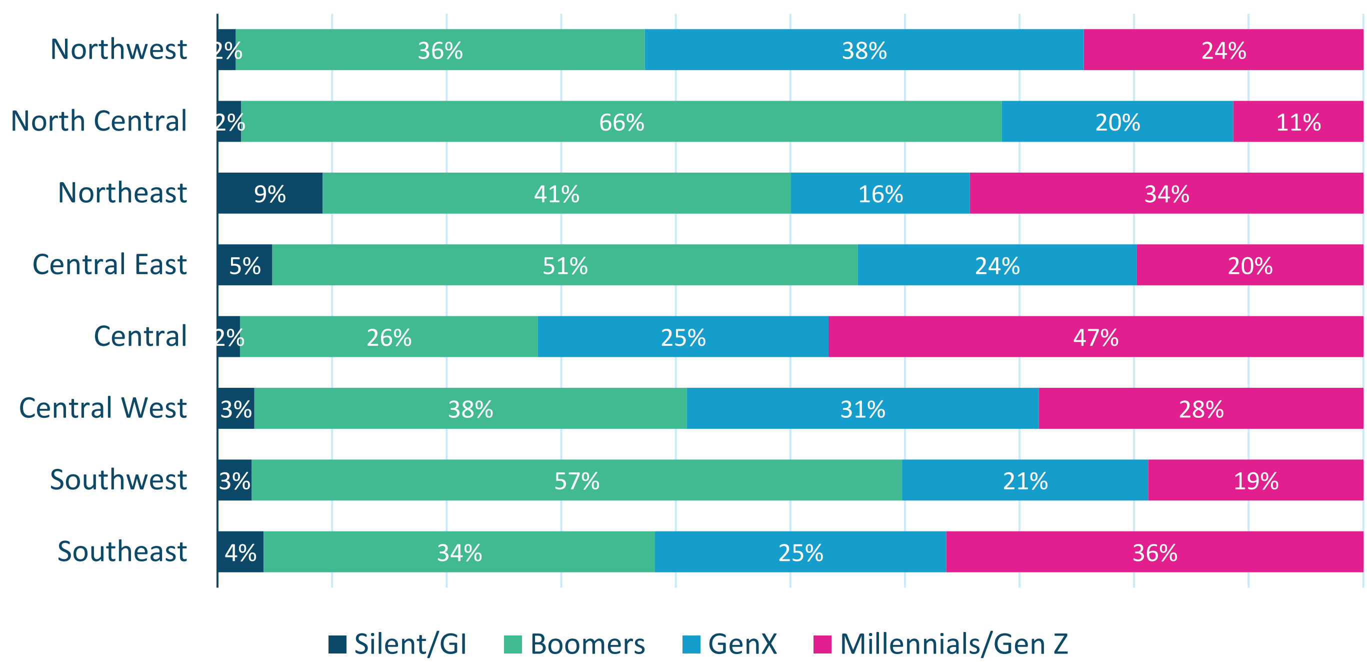
Source: D.K. Shifflet

REGIONAL COMPARISON (CONTINUED)

TRAVEL PARTY COMPOSITION & SIZE BY FLORIDA REGION



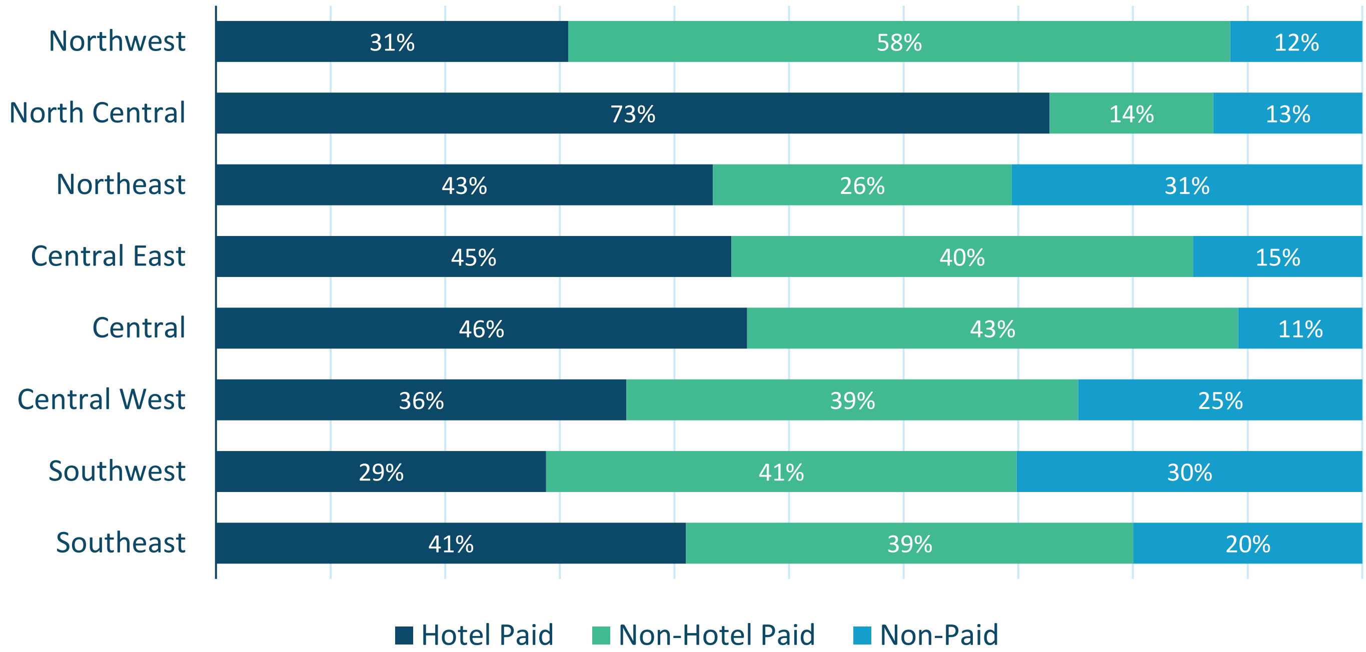
GENERATION BY FLORIDA REGION



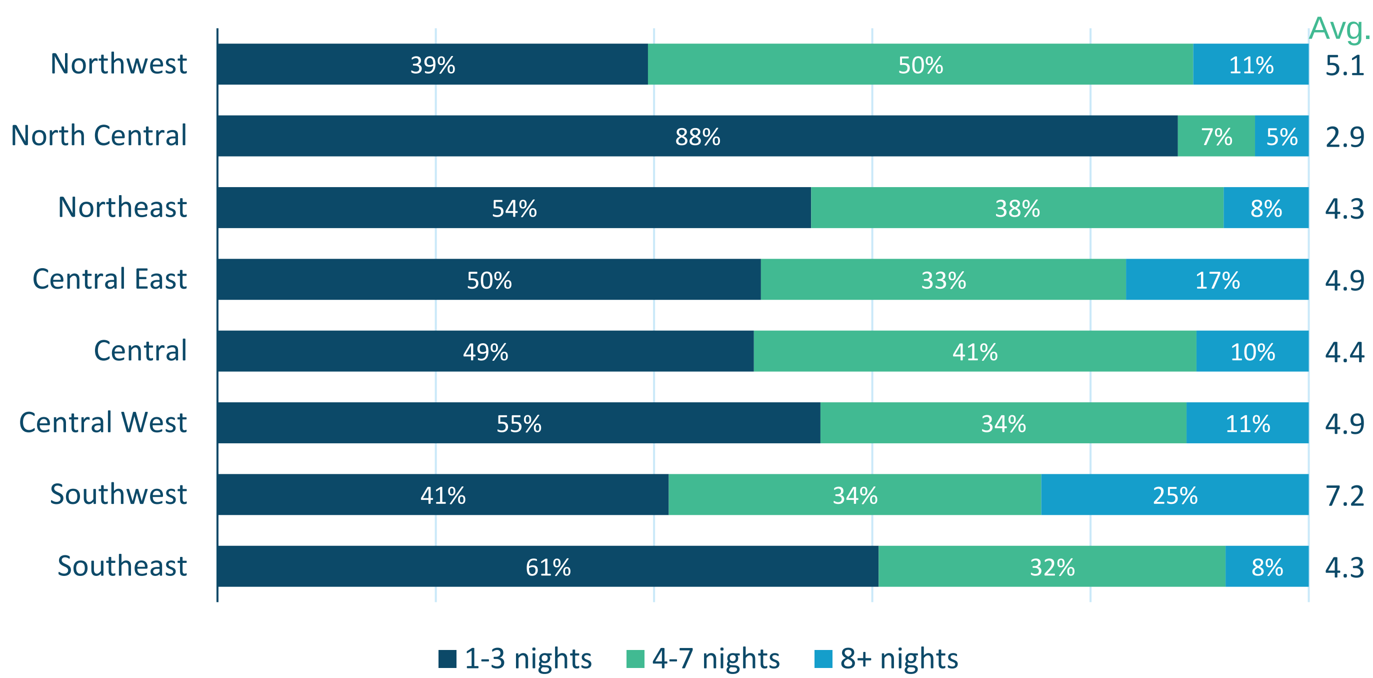
Source: D.K. Shifflet

REGIONAL COMPARISON (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 traveling in state were more slightly more likely to be traveling for leisure in 2021 (83%) than they had been the previous year (81%), reflecting the recovery of leisure travel after a year of significant disruption in 2020. The share of visitors traveling for a general vacation rose 9 percentage points to 34%, while visiting friends and relatives grew 4 percentage points to 18%. Business travelers were a smaller share of the total in 2021, pulled downward by a decrease in business conventions (5%) as many such events were cancelled, postponed, or held online during the year.
- The seasonality of in-state travel in 2021 looked much as it had before the pandemic. Summer was the most popular month for travel, with a 31% share of in-state visitors, followed by Winter (24%). Spring held a notably smaller share than it had in 2019, accounting for 23% of visitors compared to 28% pre-pandemic.
- Florida's in-state travelers had an average party size of 1.9 people in 2021, up modestly from the previous year but down from 2.0 in 2019. An increase in the percentage of adults traveling alone was a key factor behind the reduction in party size, as 40% were solo travelers in 2021 compared to 37% in 2019.
- The Central region was the top destination for in-state travelers in 2021 with a 40% share of visitors, down from 47% in 2020. The Southeast region, which ranked second, regained the share it had lost the previous year to reach 16%. The Central West (15%), Central East (9%), and Southwest (8%) regions rounded out the top five.
- In-state visitors had an average stay of 2.5 nights in 2021, comparable to the previous year but an increase from 2.3 nights in 2019.
- The top activity for in-state travelers in 2021 was visiting the beach/waterfront, which saw an increase in participation from 17% in 2020 to 21%. Rounding out the top four were culinary/dining experiences (19%), typical restaurant dining (18%), and shopping (14%). Amateur sports plummeted from first the previous year to fourteenth place, as the share of visitors participating fell 21 percentage points to 6%. Visiting friends/relatives declined for a second consecutive year, falling to 12% from 27% in 2019.
- Floridians traveling in state spent an average of $194.04 per person per day in 2021, a +10% increase from 2020. The year-over-year growth rate was smaller than for out-of-state visitors (+35%), but notably higher when compared to 2019 (+71%). The

more moderate growth between 2021 and 2020 could be traced to an -18% decline in transportation spend, which was the result of a significant decrease in rental car expenses (-36%). Four expenditure categories saw growth: shopping (+102%), lodging (+22%), food & beverage (+12%) and entertainment & recreation (+5%).

> The average household incomes of in-state travelers fell -17% from 2020 to $99,400. This was the result of a 9 percentage point increase in the share of visitors earning less than $75,000 per year. Meanwhile, the share of visitors earning $150,000 or more dropped 11 percentage points to 17%. The decline in average income was also evident among out-of-state visitors and is likely related to the increase in the share of younger visitors who tend to earn less.

> The average age of Florida's in-state visitors fell to 50.9 years in 2021, down from 53.4 years in 2020. An increase in the share of middle-aged travelers between the ages of 35 and 64 helped drive the decrease. Boomers continued to be the largest generational cohort, though their share of visitors fell from 49% to 35%. Millennial and Gen Z travelers constituted one-third (33%) of in-state visitors, up from 27% a year earlier, while Gen X travelers grew 8 percentage points in share to 27%.

> The share of in-state visitors in family lifestages recovered ground that had been lost in 2020, representing 35% of visitors after having fallen to 13% the previous year. The share of visitors in the Young & Free lifestage plummeted 19 percentage points to 8% in 2021.

> Paid accommodations saw a second consecutive year of growth in visitor share, with 82% of in-state visitors opting for a paid hotel or non-hotel accommodation. Non-hotel paid accommodations held a 27% visitor share, up from 19% in pre-pandemic 2019. The growth in popularity of non-hotel paid accommodations was driven by an increase in the share of visitors staying in second homes, homes they didn't own, and campsites/RV parks. Among in-state visitors who stayed in hotels in 2021, 39% selected a high-end property, a significant increase from 27% in 2020.

> Past experience was the most commonly used trip planning resources among in-state travelers in 2021 (33%), followed by accommodations websites/apps (25%), travel booking websites (11%), family/friend recommendation (11%), and internet search (11%).

> When booking accommodations, nearly two-thirds (64%) used an online method, most frequently hotel chain websites/apps (40%) and travel websites (12%). The share of visitors booking through a non-hotel accommodation website/app doubled from 6% in 2020 to 12% in 2021. The share of in-state visitors booking through a travel agent quadrupled to 4% over the same period.

> Orange county was by far the most popular destination for in-state visitors, with 35.0% venturing there in 2021. Other popular destinations included Hillsborough (7.5%), Pinellas (6.4%), Miami-Dade (6.3%), and Broward (5.5%).

IN-STATE VISITORS

PRIMARY PURPOSE OF TRIP

The share of in-state visitors traveling for leisure was lower in 2021 (83%) than it had been before the pandemic in 2019 (87%) but up slightly from 2020. General vacations were the most common leisure purpose (34%), followed by visiting friends/relatives (18%). Business travelers were 17% of the in-state segment, down from 19% in 2020 but higher than in 2019 by 4 percentage points. This decrease in share from the previous year could be traced to fewer Floridians traveling in state for conventions, many of which were still being cancelled, delayed, or held remotely in 2021.

	2019	2020	2021	Change '21/'20
Leisure	**87%**	**81%**	**83%**	—
General Vacation	16%	25%	34%	▲
Visit Friends/Relatives	19%	14%	18%	▲
Special Event	11%	8%	12%	▲
Getaway Weekend	28%	21%	10%	▼
Other Leisure/Personal	13%	13%	8%	▼
Business	**13%**	**19%**	**17%**	▼
Convention (business)	2%	11%	5%	▼
Seminar/Training	3%	2%	3%	—
Other Business	8%	5%	9%	▲

TRANSPORTATION TYPE

	2019	2020	2021	Change '21/'20
Air	1.8%	2.4%	3.3%	—
Non-Air	98.2%	97.6%	96.7%	—

SEASONALITY

Floridians traveling in state were more likely to be traveling in Summer in 2021 than any other season (31%), marking a return to pre-pandemic seasonality. Just under a quarter (24%) traveled in Winter, slightly higher than in 2019 and a return to normalcy compared to 2020.

	2019	2020	2021	Change '21/'20
Winter (Dec, Jan, Feb)	23%	33%	24%	▼
Spring (Mar, Apr, May)	28%	13%	23%	▲
Summer (Jun, Jul, Aug)	28%	26%	31%	▲
Fall (Sept, Oct, Nov)	21%	29%	22%	▼

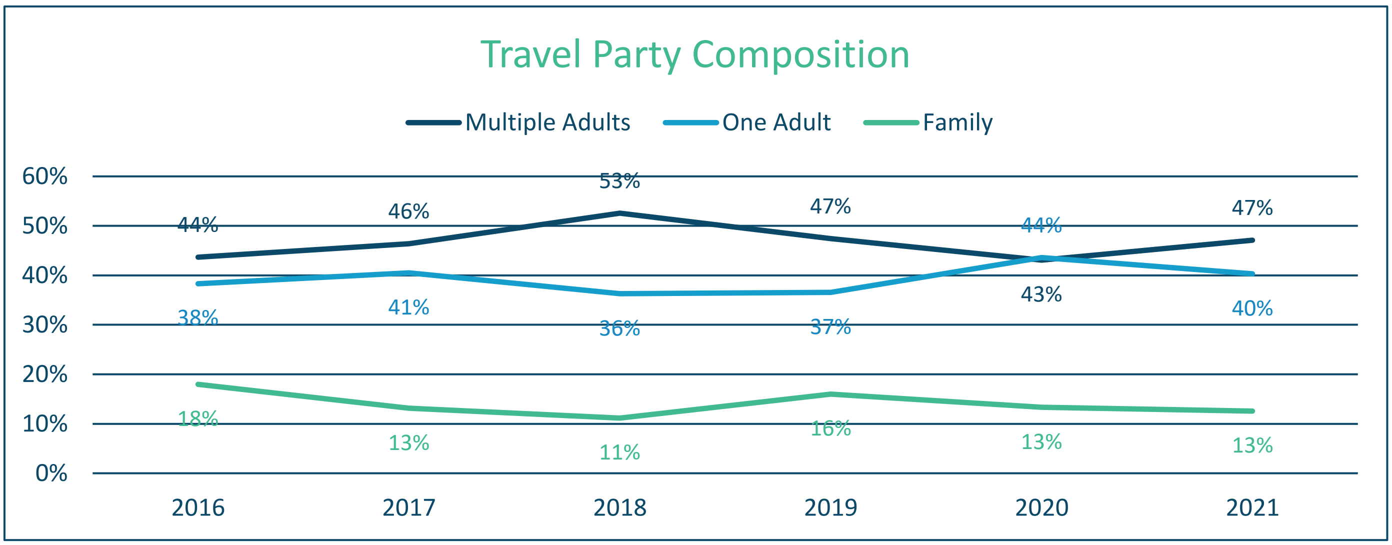
Sources: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

IN-STATE VISITORS (CONTINUED)

TRAVEL PARTY COMPOSITION

The average party size among in-state visitors was 1.9 people in 2021, down from 2.0 in 2019. This was attributable to a decrease in the share of families and an increase in adults traveling alone.

	2019	2020	2021	Change '21/'20
One Adult	37%	44%	40%	▼
One Male and One Female	37%	35%	35%	—
Families	16%	13%	13%	—
Two Males or Two Females	5%	4%	6%	▲
Three or More Adults	5%	4%	6%	▲
Average Party Size	**2.0**	**1.8**	**1.9**	▲



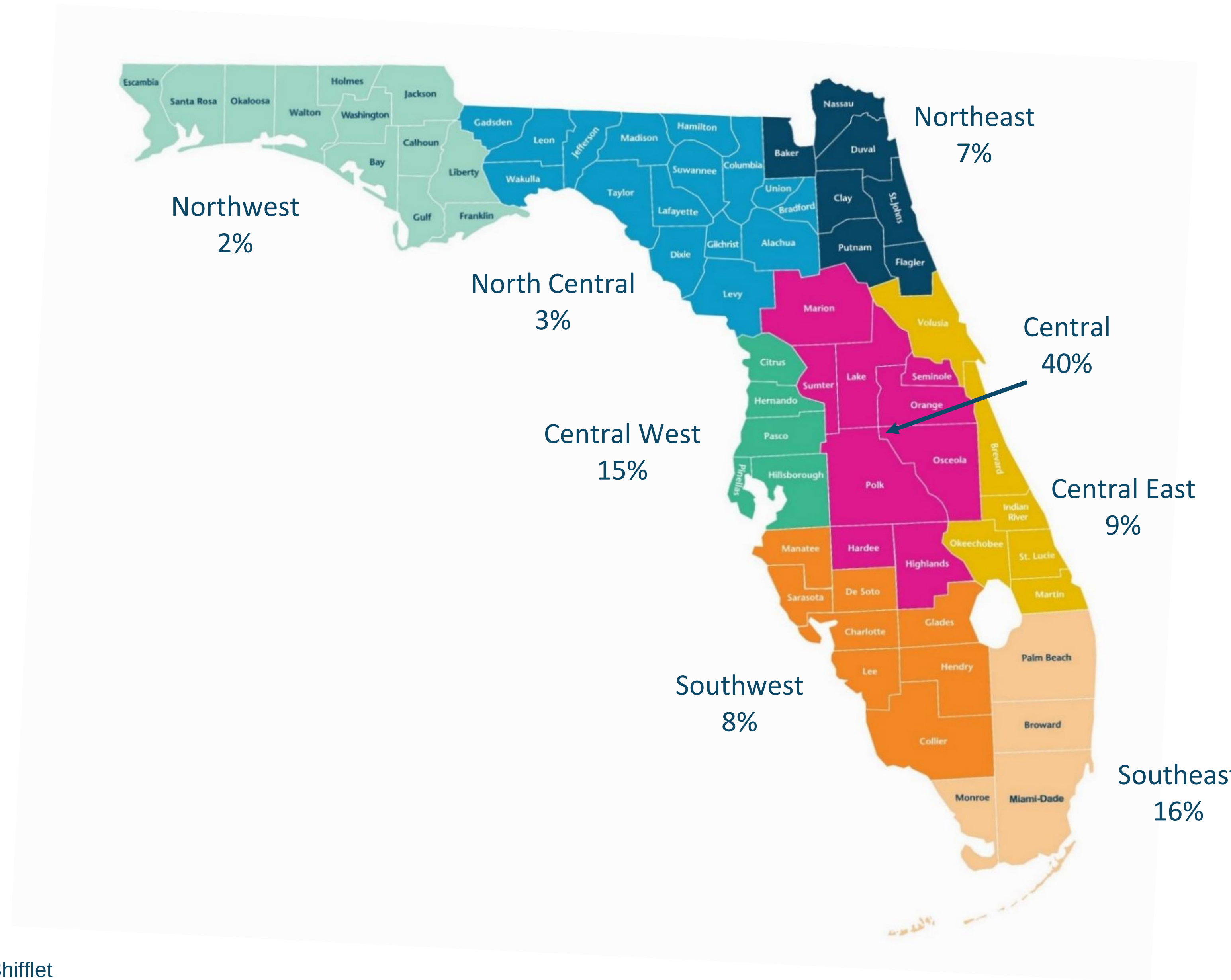
FLORIDA DESTINATION REGIONS

	2019	2020	2021	Change '21/'20
Central	38%	47%	40%	▼
Southeast	16%	10%	16%	▲
Central West	14%	14%	15%	—
Central East	8%	7%	9%	▲
Southwest	7%	5%	8%	▲
Northeast	10%	6%	7%	—
North Central	3%	3%	3%	—
Northwest	3%	7%	2%	▼

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	2019	2020	2021	Change '21/'20
1	Orange	7.8%	9.4%	12.8%	▲
2	Miami-Dade	10.9%	3.9%	6.6%	▲
3	Palm Beach	8.7%	3.6%	6.0%	▲
4	Broward	6.9%	9.6%	5.9%	▼
5	Pinellas	3.8%	6.0%	5.7%	—
6	Hillsborough	9.3%	4.7%	5.2%	▲
7	Osceola	2.1%	11.9%	4.4%	▼
8	Duval	4.8%	2.8%	3.6%	▲
9	Pasco	3.3%	1.6%	3.6%	▲
10	Volusia	3.2%	3.0%	3.5%	▲
11	Polk	2.5%	4.0%	3.0%	▼
12	Sarasota	1.2%	0.7%	2.9%	▲
13	Brevard	2.7%	3.2%	2.6%	▼
14	Marion	1.6%	0.8%	2.5%	▲
15	Seminole	1.9%	4.0%	2.5%	▼

TOP DESTINATION COUNTIES

Rank	County	2019	2020	2021	Change '21/'20
1	Orange	31.8%	25.6%	35.0%	▲
2	Hillsborough	9.1%	9.3%	7.5%	▼
3	Pinellas	4.1%	2.9%	6.4%	▲
4	Miami-Dade	4.1%	3.0%	6.3%	▲
5	Broward	4.3%	3.8%	5.5%	▲
6	Volusia	4.0%	3.0%	5.0%	▲
7	Duval	6.3%	2.1%	4.1%	▲
8	Lee	2.8%	2.9%	2.8%	—
9	Brevard	2.3%	2.4%	2.8%	—
10	Osceola	1.4%	15.6%	2.6%	▼
11	Palm Beach	3.6%	1.4%	2.1%	▲
12	St Johns	2.7%	3.6%	2.0%	▼
13	Sarasota	2.4%	1.0%	1.8%	▲
14	Monroe	3.9%	1.9%	1.7%	—
15	Manatee	0.6%	0.2%	1.4%	▲

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

IN-STATE VISITORS (CONTINUED)

ACTIVITIES DURING TRIP

The share of in-state travelers visiting friends and relatives fell for a second year to 12% in 2021, down from 18% in 2020. Visiting friends/relatives had been the top activity in 2019 (27%). In 2021, the most popular activities were visits to the beach/waterfront (21%), culinary/dining experiences (19%), typical restaurant dining (18%), and shopping (14%).

Activity (Multiple Response)	2019	2020	2021	Change '21/'20
Beach/Waterfront	23%	17%	21%	▲
Culinary/Dining Experience	24%	18%	19%	—
Culinary - Typical Restaurant Dining	-	-	18%	—
Shopping	19%	12%	14%	▲
Visit Friends/Relatives	27%	18%	12%	▼
Birthday	-	9%	10%	—
Golfing	2%	4%	8%	▲
Theme/Amusement/Water Park	13%	14%	8%	▼
Nightlife (bar, nightclub, etc.)	12%	7%	8%	—
Culinary - Special Dining Experience	-	-	8%	—
Touring/Sightseeing	11%	9%	7%	▼
Business/Work	5%	10%	7%	▼
Holiday Celebration	5%	6%	6%	—
Amateur Sports (attend/participate)	5%	27%	6%	▼
Boating/Sailing	4%	7%	5%	▼
Anniversary	-	8%	5%	▼
Fishing	5%	4%	5%	—
Gambling (slots, cards, horses, etc.)	3%	5%	5%	—
Hiking	1%	5%	5%	—
Other Activities	2%	5%	4%	—
Historic Sites	7%	6%	4%	▼
Festival/Fairs	5%	16%	4%	▼
Museum, Art Exhibits, etc.	4%	5%	4%	—
Bicycling	3%	18%	4%	▼
Camping	1%	5%	4%	—
Parks (national, state, etc.)	7%	6%	3%	▼
Movies	6%	6%	3%	▼
Hunting	0%	3%	3%	—
Water Sports	3%	4%	3%	—
Spa / Wellness	1%	4%	2%	▼
Live Music	8%	4%	2%	▼

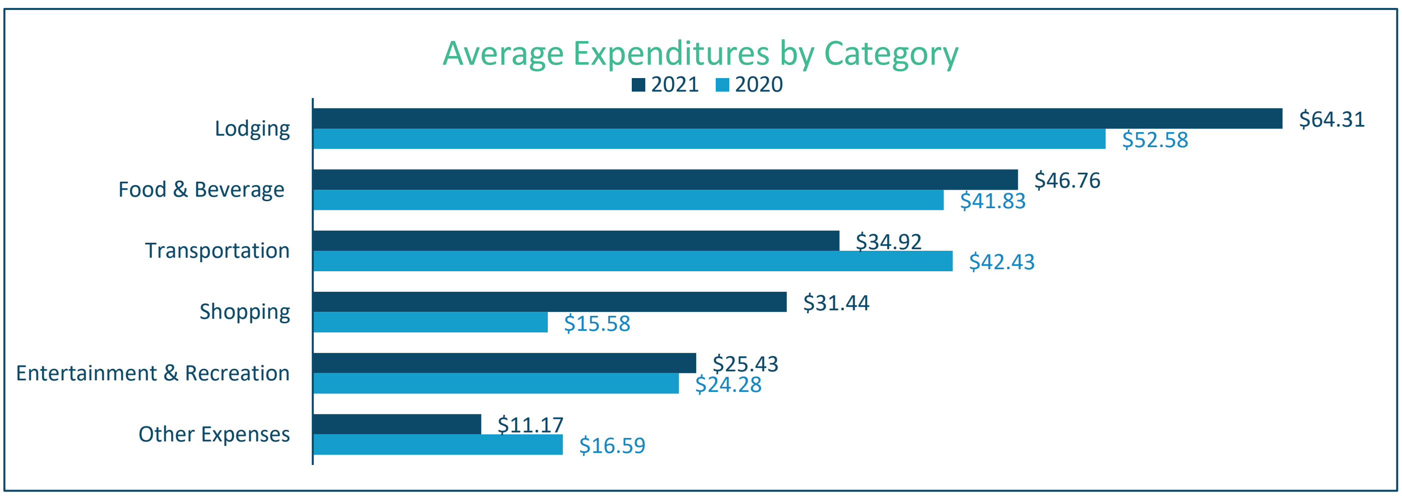
Source: D.K. Shifflet; Arrows indicate change of at least 2 percentage points

IN-STATE VISITORS (CONTINUED)

AVERAGE EXPENDITURES PER PERSON PER DAY

The average expenditures of in-state visitors grew by 10% from the previous year to $194.04 per person per day (including transportation). While faster than the rate of inflation[1], it trailed the rate of growth for out-of-state visitors (35%). In-state visitors did surpass their out-of-state counterparts relative to pre-pandemic 2019, with Floridians spending 70.6% more on average compared to 44.9% for non-Floridians. In-state visitors spent substantially more in 2021 than they had the previous year on shopping (102%), lodging (22%), and food & beverage (12%), but spending on transportation dropped by 18% due to a 36% decline in car rental expenditures.

	2019	2020	2021	Change '21/'20
Avg. Expenditures (incl. transportation)	**$113.77**	**$176.27**	**$194.04**	**10%**
Avg. Expenditures (excl. transportation)	**$92.98**	**$133.84**	**$159.11**	**19%**
Lodging - Total	$44.36	$52.58	$64.31	22%
Lodging - Room	*$47.67*	*$49.22*	*$60.46*	*23%*
Lodging - Services (internet, parking, etc.)	*$5.73*	*$5.65*	*$8.85*	*57%*
Food & Beverage	$32.66	$41.83	$46.76	12%
Transportation - Total	$20.79	$42.43	$34.92	-18%
Transportation - Airfare	*$55.14*	*$68.96*	*$65.53*	*-5%*
Transportation - Rental Car	*$41.77*	*$82.76*	*$52.56*	*-36%*
Transportation - Other (taxi, bus , gas, etc.)	*$15.16*	*$27.39*	*$25.46*	*-7%*
Shopping	$13.60	$15.58	$31.44	102%
Entertainment & Recreation	$12.92	$24.28	$25.43	5%
Other Expenses	$3.07	$16.59	$11.17	-33%



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

Source: D.K. Shifflet

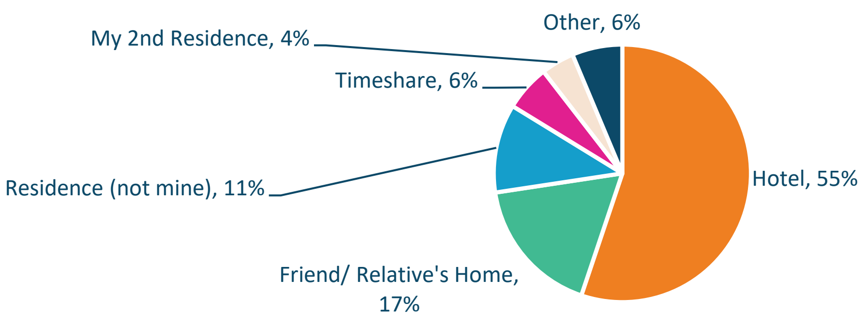
IN-STATE VISITORS (CONTINUED)

PAID VS. NON-PAID ACCOMMODATIONS

The share of in-state travelers opting for a non-hotel paid accommodation was 27% in 2021, a notable increase over 2019. Much of the growth in non-hotel accommodations was driven by an increase in the share staying in second homes, private homes they don't own, and campsites/RV parks. More than half (55%) of visitors stayed in a hotel.

	2019	2020	2021	Change '21/'20
Paid	**77%**	**81%**	**82%**	—
Hotel Paid	*58%*	*51%*	*55%*	▲
Non-Hotel Paid	*19%*	*30%*	*27%*	▼
Non-Paid	**23%**	**19%**	**18%**	—

ACCOMMODATION TYPE



HOTEL LEVEL

Floridians traveling in state were far more likely to stay in a high-end hotel property than they had been in 2020 or 2019. The share of in-state visitors that opted for a luxury or upscale property reached 39%, a 12 percentage point increase over the previous year.

	2019	2020	2021	Change '21/'20
High End	**32%**	**27%**	**39%**	▲
Luxury	6%	13%	13%	—
Upscale	26%	14%	26%	▲
Mid-Level	**52%**	**54%**	**43%**	▼
Upper Moderate	20%	21%	17%	▼
Moderate	32%	33%	26%	▼
Economy	**16%**	**19%**	**18%**	—
Lower Moderate	7%	8%	8%	—
Budget	9%	10%	10%	—

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

IN-STATE VISITORS (CONTINUED)

LENGTH OF STAY

Floridians traveling in state had an average stay lasting 2.5 nights in 2021, unchanged from the previous year. Short stays were slightly less common than they had been in 2020, with the share staying 1 to 3 nights falling 2 percentage points to 85%. The share staying 4 to 7 nights rose 2 percentage points to 13%, while the share staying 8 or more nights remained at 2%.

	2019	2020	2021	Change '21/'20
1-3 nights	85%	87%	85%	▼
4-7 nights	13%	11%	13%	▲
8+ nights	1%	2%	2%	—
Average Nights in Florida	**2.3**	**2.5**	**2.5**	—

ACCOMMODATION RESERVATION TYPE

Over half (57%) of in-state visitors made their reservation online, up from 49% the previous year and from 55% in 2019. While hotel chain websites (40%) were the most popular means of online booking, non hotel accommodation websites/apps saw the most significant growth with a doubling of visitor share to 12%. Another notable increase: the share of visitors booking with a travel agent quadrupled from 1% to 4%.

	2019	2020	2021	Change '21/'20
Made Reservation	**92%**	**87%**	**90%**	▲
Online	55%	49%	64%	▲
Hotel Chain Website/App	*38%*	*36%*	*40%*	▲
Travel Website	*12%*	*7%*	*12%*	▲
Non Hotel Accommodations site/app	*4%*	*6%*	*12%*	▲
Other Website	*1%*	*0.4%*	*0.1%*	—
Called Directly	12%	34%	20%	▼
Travel Agent	1%	1%	4%	▲
Other	24%	4%	2%	▼
No Reservation	**8%**	**13%**	**10%**	▼

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

IN-STATE VISITORS (CONTINUED)

TRIP PLANNING TIME FRAME

In-state visitors were more likely to book a month or more in advance in 2021 (48%) than they had been the previous year (38%). This was partly attributable to a decrease in the share of visitors booking a week or less in advance of departure, which fell from 46% to 36%. The share planning 6+ months in advance also declined with the share dropping from 5% to 2%.

	2019	2020	2021	Change '21/'20
1 Week or Less	34%	46%	36%	▼
2-3 Weeks	15%	16%	16%	—
1 Month	21%	19%	23%	▲
2-3 Months	19%	11%	17%	▲
4-5 Months	5%	2%	4%	▲
6 Months	2%	1%	2%	—
More Than 6 Months	3%	5%	2%	▼

TRIP PLANNING RESOURCES USED

4 out of 5 (80%) Floridians traveling in state used at least one resource when planning their trip in 2021, up from 74% in 2020. Past experience was the most frequently used resource, though the share of visitors relying on it fell 9 percentage points to 33%. Accommodations websites/apps gained 4 percentage points in visitor share to reach 25%. Travel booking websites (11%), family/friend recommendations (11%), and internet search (11%) rounded out the list of top five resources.

	2019	2020	2021	Change '21/'20
Used Resource	**78%**	**74%**	**80%**	▲
Past Experience	28%	42%	33%	▼
Accommodation Websites / Apps	20%	21%	25%	▲
Travel Booking Website (Expedia, etc.)	8%	11%	11%	—
Friend/Family Recommendation	15%	13%	11%	▼
Internet Search (Bing, Google, etc.)	14%	16%	11%	▼
Attraction Websites	5%	21%	11%	▼
Destination Websites	4%	10%	11%	—
Mapping Websites (Google Maps, etc.)	10%	13%	8%	▼
Destination Visitor Guides - Online	3%	3%	8%	▲
Social Networking Sites (Facebook, etc.)	3%	17%	7%	▼
No Resource Used	**22%**	**26%**	**20%**	▼

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

IN-STATE VISITORS (CONTINUED)

AGE OF ADULT TRAVELERS

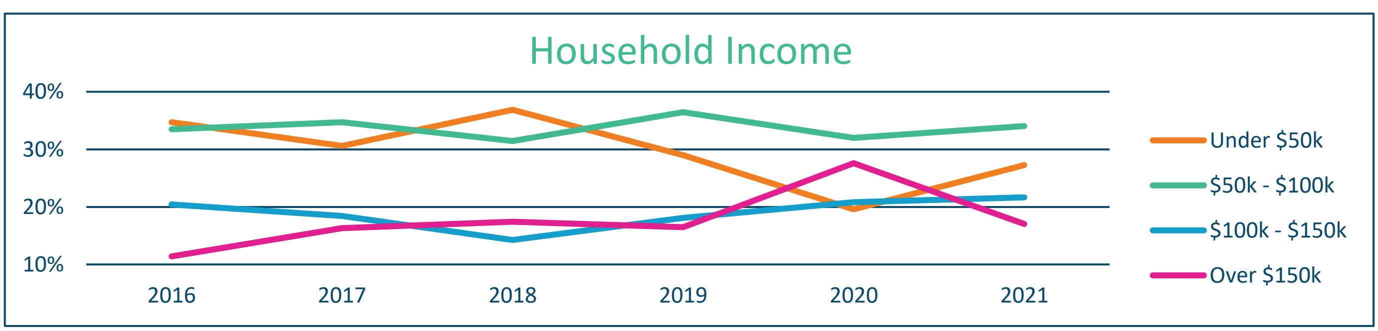
In-state visitors were younger on average in 2021, with an average age of 50.9 years compared to 53.4 in 2020. The decline in age was the result of an increase in the share of middle age visitors. The share aged 35-64 rose from 41% in 2020 to 55% in 2021.

	2019	2020	2021	Change '21/'20
18 - 34 Years Old	24%	23%	19%	▼
35 - 49 Years Old	26%	17%	28%	▲
50 - 64 Years Old	25%	24%	27%	▲
65+ Years Old	24%	36%	26%	▼
Average Age	**49.7**	**53.4**	**50.9**	▼

HOUSEHOLD INCOME

In addition to being younger on average than in 2020, in-state visitors in 2021 tended to have lower household incomes. The average household income fell 17% from 2020 to $99,400, dragged downward by a 9 percentage point increase in the share earning less than $75,000 annually. Simultaneously, the share earning over $150k fell from 28% to 17%.

	2019	2020	2021	Change '21/'20
Under $35,000	15%	13%	17%	▲
$35,000 - $49,999	14%	6%	10%	▲
$50,000 - $74,999	22%	17%	19%	▲
$75,000 - $99,999	15%	15%	15%	—
$100,000 - $149,999	18%	21%	22%	—
$150,000 - $199,999	10%	16%	11%	▼
$200,000+	7%	12%	6%	▼
Average	**$96,300**	**$119,600**	**$99,400**	-17%



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

IN-STATE VISITORS (CONTINUED)

GENERATION

Boomers were the largest generations cohort in 2021, accounting for 35% of in-state visitors. This was down from nearly half (49%) in 2020. Millennial and Gen Z travelers regained visitor share that had been lost in 2020, climbing from 27% to 33%.

	2019	2020	2021	Change '21/'20
Millennials/Gen Z (1981 or later)	32%	27%	33%	▲
GenX (1965-1980)	26%	19%	27%	▲
Boomers (1946 -1964)	37%	49%	35%	▼
Silent/GI (1945 or earlier)	5%	5%	4%	—

LIFESTAGE

In-state visitors in family lifestages saw significant recovery in 2021. All family lifestages combined accounted for 35% of visitors, up from 13% in 2020. Young Families rebounded to 12% after falling to 0% in 2020, while Moderate Families quintupled from 1% in share to 5%. Young & Free travelers saw a notable decrease in share, which fell from 27% in 2020 to 8% in 2021.

	2019	2020	2021	Change '21/'20
Young & Free (18-34; any income; no kids)	13%	27%	8%	▼
Young Family (18-34; any income; kids in HH)	13%	0%	12%	▲
Maturing & Free (35-54; any income; no kids)	17%	14%	16%	▲
Moderate Family (35-54; <$75K; kids in HH)	9%	1%	5%	▲
Affluent Family (35-54; $75K+; kids in HH)	9%	11%	18%	▲
Moderate Mature (55 or older, <$100K; no kids)	24%	31%	26%	▼
Affluent Mature (55 or older; $100K+, no kids)	14%	15%	15%	—

PROFILE OF INTERNATIONAL VISITORS TO FLORIDA

Prepared by VISIT FLORIDA

Research Department

TOP INTERNATIONAL ORIGIN MARKETS

CALENDAR YEAR 2021 vs 2019

FINAL

in person-trips

RANK	ORIGIN COUNTRY	2019 VISITS	2021 VISITS	% CHANGE	% OF TOTAL
1.	Colombia	550,000	709,000	29%	16%
2.	Canada	4,088,000	454,000	-89%	10%
3.	Mexico	499,000	389,000	-22%	9%
4.	Peru	182,000	261,000	43%	6%
5.	Ecuador	246,000	237,000	-4%	5%
6.	Argentina	559,000	227,000	-59%	5%
7.	Venezuela	320,000	179,000	-44%	4%
8.	United Kingdom	1,334,000	139,000	-90%	3%
9.	Costa Rica	157,000	138,000	-12%	3%
10.	Brazil	1,304,000	132,000	-90%	3%

RANK	WORLD REGION	2019 VISITS	2021 VISITS	% CHANGE	% OF TOTAL
1.	South America	3,514,000	1,985,000	-44%	44%
2.	North America	4,587,000	844,000	-82%	19%
3.	Europe	3,480,000	529,000	-85%	12%
4.	Central America	537,000	504,000	-6%	11%
5.	Caribbean	1,036,000	489,000	-53%	11%
6.	Middle East	164,000	81,000	-51%	2%
7.	Asia/Oceania	516,000	70,000	-86%	2%
8.	Africa	54,000	12,000	-78%	0%

Total International	**13,889,000**	**4,513,000**	**-68%**

Notes: Figures rounded to the nearest thousand and, therefore, may not sum to total. Figures released November 15, 2022.

Sources: VISIT FLORIDA international estimates, excluding Canada, are based on and extrapolated from aggregate card data provided by Visa Destination Insights® and incorporate data from other research sources; Canadian preliminary estimates derived from VISIT FLORIDA analysis of historical data and the most recent available data on trends.

TOP INTERNATIONAL ORIGIN MARKETS

CALENDAR YEAR 2021 vs 2020
FINAL
in person-trips

RANK	ORIGIN COUNTRY	2020 VISITS	2021 VISITS	% CHANGE	% OF TOTAL
1.	Colombia	169,000	709,000	319%	16%
2.	Canada	1,485,000	454,000	-69%	10%
3.	Mexico	168,000	389,000	131%	9%
4.	Peru	59,000	261,000	343%	6%
5.	Ecuador	100,000	237,000	137%	5%
6.	Argentina	151,000	227,000	51%	5%
7.	Venezuela	67,000	179,000	170%	4%
8.	United Kingdom	181,000	139,000	-23%	3%
9.	Costa Rica	59,000	138,000	133%	3%
10.	Brazil	292,000	132,000	-55%	3%

RANK	WORLD REGION	2020 VISITS	2021 VISITS	% CHANGE	% OF TOTAL
1.	South America	967,000	1,985,000	105%	44%
2.	North America	1,653,000	844,000	-49%	19%
3.	Europe	655,000	529,000	-19%	12%
4.	Central America	174,000	504,000	190%	11%
5.	Caribbean	273,000	489,000	79%	11%
6.	Middle East	44,000	81,000	84%	2%
7.	Asia/Oceania	114,000	70,000	-39%	2%
8.	Africa	11,000	12,000	6%	0%

Total International	**3,891,000**	**4,513,000**	**16%**

Notes: Figures rounded to the nearest thousand and, therefore, may not sum to total. Figures released November 15, 2022.

Sources: VISIT FLORIDA international estimates, excluding Canada, are based on and extrapolated from aggregate card data provided by Visa Destination Insights® and incorporate data from other research sources; Canadian preliminary estimates derived from VISIT FLORIDA analysis of historical data and the most recent available data on trends.

VISIT FLORIDA®

OVERSEAS VISITORS TO FLORIDA

Summary:

> Overseas visitation began to recover in 2021, rising 68.6% from 2020 to 4.1 million. Travel restrictions limited visitation from Brazil and much of Europe during the first ten months of the year, contributing to a -58.6% decline in overseas visitors compared to 2019. The recovery was instead led by a few secondary markets in Latin America that were less hampered by pandemic restrictions. Colombia was the top overseas origin country (709,000), followed by Mexico (389,000). Peru (261,000), Ecuador (237,000), and Argentina (227,000). Colombia, Peru, and Ecuador each sent more visitors to Florida in 2021 than they had in pre-pandemic 2019.

> Nearly 90% of overseas visitors who traveled to Florida in 2021 were doing so primarily for leisure, up from 88% in 2019. Business travel was less common, with visitor share falling from 9% in 2019 to 6% in 2021.

> Travel party size fell for a second consecutive year, dropping to 1.6 people from 1.9 in 2019. An increase in the share of single adults traveling alone drove the shift, climbing from 50% in 2019 to 61% in 2021.

> Expenditures per visitor per trip rose by 4% to $1,643 thanks to an increase in average length of stay, while expenditures per visitor per day fell -7% to $85.

> Overseas visitors made their decision to travel an average of 66.1 days in advance of departure, down from 116.8 days in 2019. With shorter planning timeframes, overseas visitors were also booking closer to departure, an average of 49.8 days in advance compared to 90.1 in 2019.

> Just over half (51%) of overseas visitors booked their air travel directly through an airline, an increase from 43% in 2019. The share booking through an internet booking service fell from 32% to 30%, while the share booking through a travel agency office fell from 19% to 17% over the same time period.

> Airlines were the most commonly used planning resource in 2021, utilized by 61% of Florida overseas visitors. Personal recommendations were second (29%), followed by online travel agencies (28%), national/state/city travel offices (14%) and travel agency offices (11%).

> Private and company autos were the most popular form of transportation used by overseas visitors in 2021, used by over half (51%) in 2021. Rented autos (37%), air travel between U.S. cities (21%), and ride-sharing services (16%) were also popular, but all declined in usage from 2019.

> Florida's overseas visitors spent an average of 14.8 nights in Florida in 2021, a substantial increase from 11.2 nights in 2019.

> Overseas visitors were more likely to stay in a private home (52%) than a hotel/motel (49%) in 2021, a sharp reversal from 2019 when the share of visitors staying in hotels/motels (72%) was more than twice as large as the share staying in private homes (32%).

> Miami extended its lead as the top destination state for overseas visitors in 2021. Two-thirds (67%) visited Miami during the year, up from 54% in 2019. The share traveling to Orlando fell 16 percentage points to 30%, while the share venturing to Fort Lauderdale climbed from 10% to 12% between 2019 and 2021.

> The top activities for overseas visitors in 2021 were shopping (91%), sightseeing (62%), amusement/theme parks (36%), fine dining (24%), and visiting small towns/countryside (22%).

> Visitation increased season-to-season in 2021, with 20% of overseas visitors arriving in Winter, 22% in Spring, 28% in Summer, and 31% in Fall.

> Overseas visitors had an average age of 39 years in 2021, down from 41 years in 2019. In addition to skewing younger than during pre-pandemic times, overseas visitors also had slightly lower incomes; average household income fell -11% from 2019 to $64,400, marking a third consecutive year of declines.

OVERSEAS VISITORS TO FLORIDA

PRIMARY PURPOSE OF TRIP

	2019	2020	2021	Change '21/'20
Leisure	**88%**	**86%**	**89%**	▲
Vacation/Holiday	72%	68%	62%	▼
Visit Friends/Relatives	16%	17%	28%	▲
Business	**9%**	**11%**	**6%**	▼
Transient Business	5%	8%	5%	▼
Conference/Convention/Trade Show	4%	3%	1%	▼
Other	**3%**	**4%**	**5%**	—

TRAVEL PARTY SIZE

	2019	2020	2021	Change '21/'20
One Adult	50%	60%	61%	—
Two Adults	28%	23%	21%	▼
Three or More Adults	5%	4%	4%	—
Traveling with Children	17%	14%	14%	—
Average Total Party Size	**1.9**	**1.7**	**1.6**	▼

TRAVEL PARTY COMPOSITION

Composition (Multiple Response)	2019	2020	2021	Change '21/'20
Traveling Alone	50%	60%	62%	▲
Traveling with Family/Relatives	25%	21%	21%	—
Traveling with Spouse/Partner	28%	21%	17%	▼
Traveling with Friend(s)	5%	3%	3%	—
Other	1%	2%	0.4%	▼

EXPENDITURES IN U.S.

	2019	2020	2021	Change '21/'20
Per Travel Party/Trip	$2,905	$2,737	$2,662	-3%
Per Visitor/Trip	$1,551	$1,582	$1,643	4%
Per Visitor/Day	$101	$91	$85	-7%

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

	2019	2020	2021	Change '20/'19
1 - 30 Days	29%	39%	58%	▲
31 - 60 Days	17%	15%	19%	▲
61 - 120 Days	23%	21%	13%	▼
More than 120 Days	31%	25%	10%	▼
Average Number of Days	**116.8**	**98.0**	**66.1**	▼

TRIP PLANNING SOURCES

Source (Multiple Choice)	2019	2020	2021	Change '20/'19
Airline	54%	55%	61%	▲
Personal Recommendation	31%	29%	29%	—
Online Travel Agency	35%	32%	28%	▼
National/State/City Travel Office	12%	12%	14%	▲
Travel Agency Office	15%	12%	11%	—
Travel Guide	10%	10%	6%	▼
Tour Operator/Travel Club	9%	8%	5%	▼
Corporate Travel Department	9%	11%	5%	▼
Other	5%	6%	4%	▼

TRANSPORTATION USED WHILE IN U.S.

Type (Multiple Response)	2019	2020	2021	Change '21/'20
Auto, Private or Company	39%	42%	51%	▲
Rented Auto	46%	42%	37%	▼
Air Travel between U.S. Cities	24%	21%	21%	—
Ride-sharing Service	18%	17%	16%	—
Taxicab/Limousine	17%	17%	11%	▼
City Subway/Tram/Bus	13%	11%	8%	▼
Bus between Cities	11%	12%	8%	▼
Railroad between Cities	4%	4%	3%	—
Ferry/River Taxi/Srt Scenic Cruise	5%	4%	2%	▼
Rented Bicycle/Motorcycle/Moped	2%	3%	2%	—
Overnight Cruise Ship/River Boat	8%	7%	1%	▼
Motor Home/Camper	0.5%	1%	0%	—

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

OVERSEAS VISITORS TO FLORIDA (CONTINUED)

ADVANCE AIR TRAVEL RESERVATIONS

	2019	2020	2021	Change '21/'20
1 - 30 Days	39%	49%	69%	▲
31 - 60 Days	17%	16%	15%	—
61 - 120 Days	22%	19%	10%	▼
More than 120 Days	23%	17%	7%	▼
Average Number of Days	**90.1**	**72.4**	**49.8**	▼

AIR TRAVEL RESERVATION METHOD

Method (Multiple Response)	2019	2020	2021	Change '21/'20
Directly with the Airline	43%	43%	51%	▲
Internet Booking Service	32%	33%	30%	▼
Travel Agency Office	19%	16%	17%	—
Tour Operator/Travel Club	9%	7%	7%	—
Corporate Travel Department	6%	9%	4%	▼
Other	1%	1%	1%	—

TOP REASONS FOR SELECTING AIRLINE

Reason (Select Up to 3)	2019	2020	2021	Change '21/'20
Airfare	55%	58%	62%	▲
Convenient Schedule	42%	42%	45%	▲
Non-stop Flights	37%	39%	39%	—
Previous Good Experience	29%	30%	28%	▼
On-time Reputation	13%	16%	14%	▼
Safety Reputation	13%	13%	11%	▼
Mileage Bonus/Freq. Flyer Program	13%	13%	11%	▼
Loyalty to Carrier	9%	8%	8%	—
In-flight Service Reputation	8%	9%	4%	▼
Other	5%	4%	4%	—

LENGTH OF STAY

	2019	2020	2021	Change '21/'20
Average Nights in Florida	11.2	12.6	14.8	▲

OVERSEAS VISITORS TO FLORIDA (CONTINUED)

ACCOMMODATIONS

Type (Multiple Response)	2019	2020	2021	Change '21/'20
Hotel/Motel	72%	69%	49%	▼
Private Home	32%	36%	52%	▲
Other	5%	4%	8%	▲

LODGING RESERVATIONS

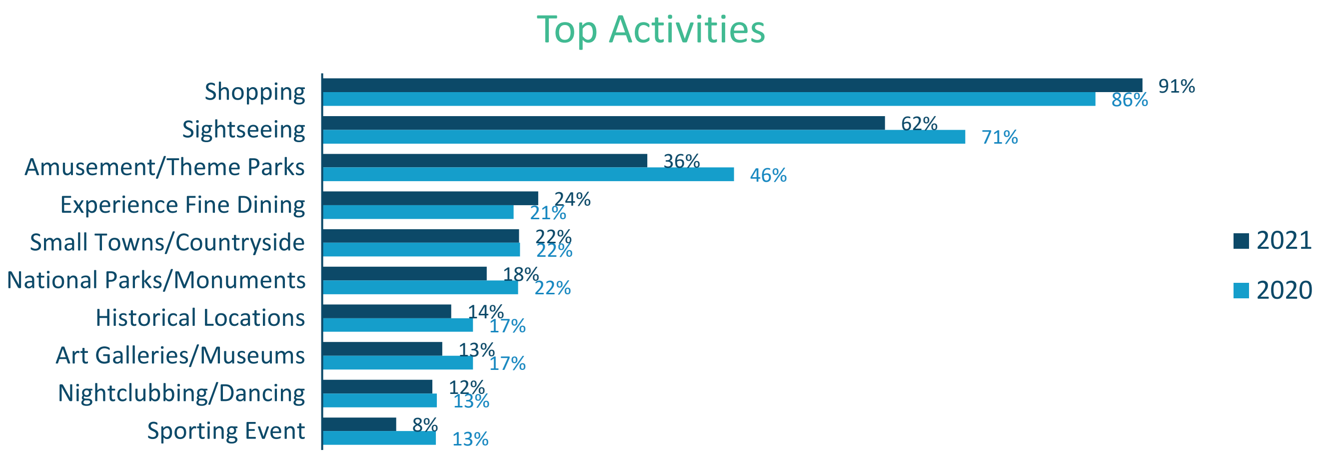
Method (Multiple Response)	2019	2020	2021	Change '21/'20
Yes, Booked through	**66%**	**61%**	**55%**	▼
Internet Booking Service	33%	31%	27%	▼
Accommodation Directly	18%	16%	16%	—
Travel Agency Office	9%	7%	5%	▼
Tour Operator/Travel Club	6%	5%	3%	▼
Corporate Travel Department	4%	5%	2%	▼
The Airline	2%	1%	2%	—
Other	2%	2%	2%	—
No Reservations	**34%**	**39%**	**45%**	—

FLORIDA DESTINATIONS VISITED

Destination (Multiple Response)	2019	2020	2021	Change '21/'20
Miami	54%	64%	67%	▲
Orlando	46%	43%	30%	▼
Ft. Lauderdale	10%	8%	12%	▲
Tampa-St. Petersburg	6%	6%	5%	—
West Palm Beach	4%	3%	4%	—
Naples	3%	2%	2%	—
Jacksonville	2%	1%	2%	—
Sarasota-Bradenton	2%	2%	1%	—
Ft. Myers	3%	2%	1%	—
Florida Keys-Key West	5%	5%	1%	▼
Melbourne	2%	1%	1%	—
Lakeland	1%	1%	0.3%	—

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

OVERSEAS VISITORS TO FLORIDA (CONTINUED)



SEASONALITY

	2019	2020	2021	Change '21/'20
Winter (Dec, Jan, Feb)	24%	78%	20%	▼
Spring (Mar, Apr, May)	22%	8%	22%	▲
Summer (Jun, Jul, Aug)	25%	1%	28%	▲
Fall (Sept, Oct, Nov)	30%	13%	31%	▲

AGE OF ADULT TRAVELERS

	2019	2020	2021	Change '21/'20
18 - 34 Years	34%	36%	36%	—
35 - 44 Years	22%	21%	26%	▲
45 - 54 Years	21%	20%	19%	—
55+ Years	23%	23%	20%	▼
Median Age	**41**	**41**	**39**	▼

HOUSEHOLD INCOME

	2019	2020	2021	Change '21/'20
Under $20,000	26%	30%	30%	—
$20,000 - $59,999	30%	29%	33%	▲
$60,000 - $99,999	18%	19%	16%	▼
$100,000+	25%	21%	21%	—
Average HH Income	**$72,500**	**$65,200**	**$64,400**	**-1%**

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

CANADIAN VISITORS TO FLORIDA

Summary:

- Border closures and travel restrictions severely constrained the capacity of Canadians to travel to Florida in 2021. Canadian visitation fell -69.4% from 2020, and was down by -88.9% from 2019.
- For the Canadians who did travel to Florida in 2021, nearly three-quarters (73.6%) traveled by air, up from 53.9% in 2020.
- The most common forms of transportation for Canadian visitors while traveling in destination were rental cars/trucks (40%), personal vehicles (37%), taxis/ride shares (20%), and walking/biking (19%). The share of visitors traveling in an RV, camper, or motorhome more than doubled from 2% in 2019 to 7% in 2021.
- Vacations and holidays were a far less common trip purpose in 2021 than they had been before the pandemic, accounting for 37% of visitors compared to 65% in 2019. Visiting friends and relatives rose from 7% to 23%, while visits to second homes and winter stays fell from 7% to 5%. The share of Canadians traveling for business recovered to 3% after falling to 1% in 2020 but was down from 4% in 2019.
- Travel parties tended to be smaller in 2021 than they had been before the pandemic, with an average size of 2.7 people compared to 3.0 in 2019. A rise in single person travel parties caused the shift, as they rose from 12% to 19% in 2021. Larger travel parties of 3 or more recovered to pre-pandemic levels, accounting for 42% of the total.
- Online experts/opinion sources were the most commonly used planning resource in 2021 (25%), followed by friends/family (24%) and booking websites (22%). The share of Canadians using social media to plan their trips fell from 32% in 2019 to 17% in 2021.
- The most popular activity for Canadian visitors in 2021 was visiting a theme/amusement park (35%), followed by visiting the beach/shore/lake (25%), and shopping (21%). General sightseeing saw a notable decline in participation, falling from 27% in 2019 to 21% in 2021. Local culinary/food experiences also decreased in participation, dropping from 13% to 8%. Among activities that saw increases in popularity were guided tours (10%) and attending sporting events (10%).

- The share of Canadian visitors staying in paid accommodations grew from 77% in 2019 to 85% in 2021. This shift was the result of Canadians being less likely to stay with friends or family members during their visit (11%) and instead opting for hotels/motels (72%) and bed and breakfasts (6%).
- The average stay for Canadian visitors in 2021 was less than half the length it had been in 2019, falling from 17.0 nights to 8.2 nights. The primary reason was a decline in the share of travelers staying 14 or more nights, which dropped 7 percentage points to 17%.
- Canadian visitors spent 83% more on average per person per day in 2021 ($109) than they had in 2019 ($60). Due to shorter average stays, spend per person per trip declined -8% to $977.
- Nearly 3 in 5 Canadian visitors (59%) hailed from Ontario in 2021, up from just over half (51%) in 2019. The share of visitors from Quebec fell from 24% to 15%, while the share from British Columbia tripled to 12%.

CANADIAN VISITORS TO FLORIDA

Data for 2020 were only collected on visitors during the first quarter of the year, due to travel disruptions caused by COVID-19.

PRIMARY PURPOSE OF TRIP

	2019	Q1 2020	2021	Change '21/'19
Leisure	**93%**	**98%**	**93%**	—
Vacation/Holiday	65%	55%	37%	▼
Other Personal Reasons	14%	20%	28%	▲
Visit Friends/Relatives	7%	11%	23%	▲
Second Home or Winter Stay	7%	12%	5%	▼
Business	**4%**	**1%**	**3%**	—
General Business Meetings/Training	2%	0%	2%	—
Other Business	3%	1%	1%	▼
Other	**3%**	**1%**	**3%**	—

TRAVEL PARTY SIZE

	2019	Q1 2020	2021	Change '21/'19
One Person	12%	10%	19%	▲
Two People	46%	55%	38%	▼
Three or More People	43%	34%	42%	—
Average Total Party Size	**3.0**	**2.7**	**2.7**	▼

TRAVEL PARTY COMPOSITION

Composition (Multiple Response)	2019	Q1 2020	2021	Change '21/'19
Traveling with Spouse/Partner	71%	72%	66%	▼
Traveling with Child(ren)	49%	40%	48%	—
Traveling with Family/Relatives	32%	20%	24%	▼
Traveling with Friend(s)	12%	20%	14%	▲
Traveling Alone	7%	3%	6%	—
Other	2%	1%	3%	—

Source: XBorder Canada

CANADIAN VISITORS TO FLORIDA (CONTINUED)

ADVANCE DECISION TO TRAVEL

	2019	Q1 2020	2021	Change '21/'19
1 - 30 Days	31%	44%	39%	▲
31 - 60 Days	18%	10%	18%	—
61 - 90 Days	9%	13%	18%	▲
More than 90 Days	42%	33%	25%	▼
Average Number of Days	**116.3**	**103.5**	**107.5**	▼

TRIP PLANNING SOURCES

Source (Multiple Response)	2019	Q1 2020	2021	Change '21/'19
Online Experts or Opinion Sources	-	13%	25%	—
Friends and Family	36%	17%	24%	▼
Booking websites (Expedia, hotels, etc.)	43%	29%	22%	▼
None	1%	17%	21%	▲
Social Media	32%	12%	17%	▼
Destination websites	27%	14%	16%	▼
Destination Travel Guides/Books/Brochures	15%	17%	13%	▼
All Other Websites	18%	7%	10%	▼
Travel/Home/Adventure Shows	8%	7%	10%	▲
Advertising (printed or online)	-	5%	9%	—
News stories (online/print)	4%	7%	8%	▲
Travel Agents	21%	18%	7%	▼

Booking/Purchase Method

Source (Multiple Response)	2019	Q1 2020	2021	Change '21/'19
Direct to the Airline	-	-	44%	—
Direct to Hotel/Resort sites	-	-	39%	—
Direct to a tour/package company	-	-	32%	—
Direct to Attraction/Show/Activity sites	-	-	26%	—
Through service like Expedia, etc.	-	-	18%	—
None of these	-	-	4%	—

Source: XBorder Canada

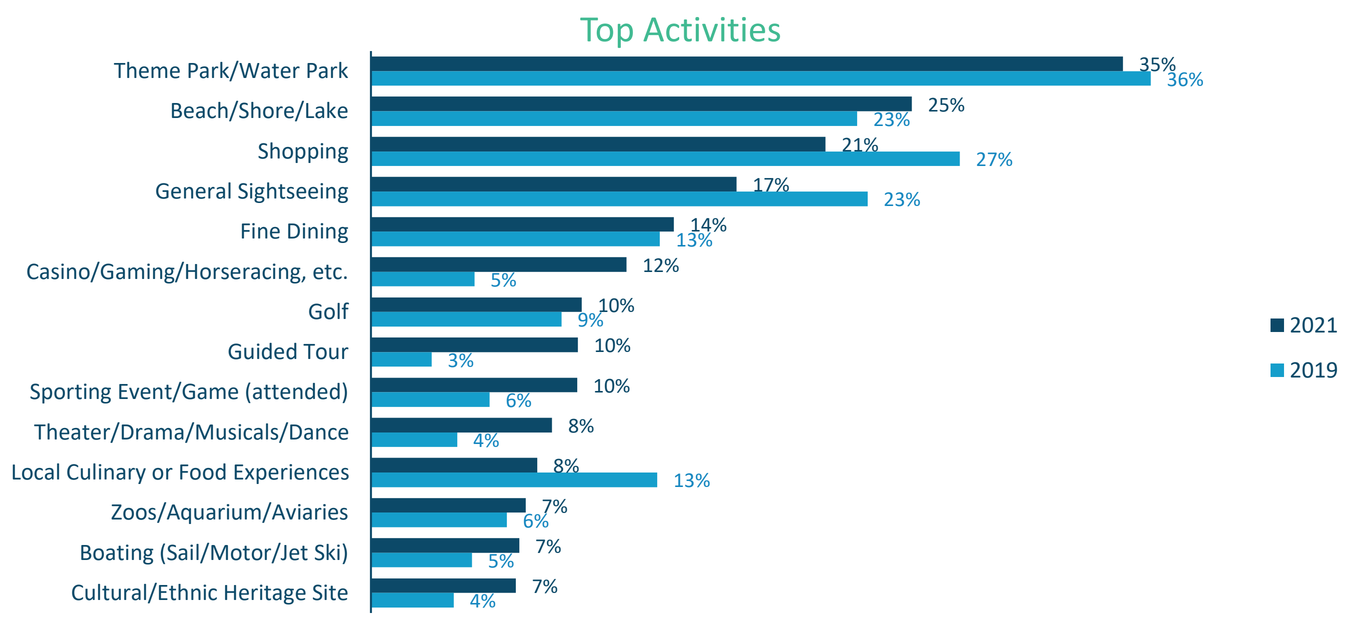
CANADIAN VISITORS TO FLORIDA (CONTINUED)

TRANSPORTATION MODE USED TO RETURN TO CANADA

	2019	Q1 2020	2021	Change '21/'19
Airplane	65%	54%	81%	▲
Personal Vehicle	31%	38%	16%	▼
Other	4%	8%	4%	—

TRANSPORTATION MODE USED WITHIN U.S.

Mode (Multiple Response)	2019	Q1 2020	2021	Change '21/'19
Rental Car/Truck	25%	12%	40%	▲
Personal Vehicle	32%	41%	37%	▲
Taxi/Ride share	10%	5%	20%	▲
Walked/Bicycle	8%	4%	19%	▲
Bus	8%	4%	11%	▲
Airplane	9%	17%	11%	▲
City Bus/Trolley/Subway	4%	2%	10%	▲
RV/Camper/Motorhome	2%	12%	7%	▲
Train	1%	3%	4%	▲
Motorcycle	1%	1%	2%	—
Ship/Boat/Ferry	4%	9%	1%	▼



Source: XBorder Canada

CANADIAN VISITORS TO FLORIDA (CONTINUED)

ACCOMMODATIONS

Type (Multiple Response)	2019	Q1 2020	2021	Change '21/'19
Paid Accommodations	**77%**	**89%**	**85%**	▲
Hotel/Motel	61%	83%	72%	▲
Shared Economy	11%	7%	8%	▼
Bed and Breakfast	1%	6%	6%	▲
Timeshare	8%	4%	3%	▼
RV/Campground/Tent	2%	2%	0.4%	▼
Unpaid Accommodations	**24%**	**33%**	**18%**	▼
Private home of friend/family	16%	17%	11%	▼
Your second home/condo	8%	12%	7%	—
Other	**7%**	**9%**	**1%**	▼

LENGTH OF STAY

	2019	Q1 2020	2021	Change '21/'19
1-3 Nights	21%	25%	17%	▼
4-13 Nights	55%	44%	66%	▲
14+ Nights	24%	30%	17%	▼
Average Nights in Florida	**17.0**	**23.6**	**8.2**	▼

EXPENDITURES IN FLORIDA

	2019	Q1 2020	2021	Change '21/'19
Per Travel Party Per Trip	$3,132	$2,295	$2,635	-16%
Per Person Per Trip	$1,059	$865	$977	-8%
Per Person Per Day	$60	$36	$109	83%

SEASONALITY

	2019	Q1 2020	2021	Change '21/'19
Winter (Dec, Jan, Feb)	34%	56%	35%	—
Spring (Mar, Apr, May)	34%	44%	8%	▼
Summer (Jun, Jul, Aug)	17%	-	21%	▲
Fall (Sept, Oct, Nov)	15%	-	37%	▲

Source: XBorder Canada

CANADIAN VISITORS TO FLORIDA (CONTINUED)

AGE OF ADULT TRAVELERS

	2019	Q1 2020	2021	Change '21/'19
18 - 24 Years	9%	9%	17%	▲
25 - 39 Years	20%	15%	31%	▲
40 - 54 Years	29%	23%	18%	▼
55+ Years	42%	53%	35%	▼
Median Age	**49**	**57**	**41**	▼

EMPLOYMENT STATUS

	2019	Q1 2020	2021	Change '21/'19
Work Full Time	37%	39%	51%	▲
Work Part Time	36%	22%	28%	▼
Do Not Work	26%	39%	21%	▼

PROVINCE OF RESIDENCE

	2019	2020	2021	Change '21/'19
Ontario	51%	46%	59%	▲
Quebec	24%	35%	15%	▼
British Columbia	4%	10%	12%	▲
Alberta	5%	2%	5%	—
Atlantic Provinces	10%	6%	4%	▼
Saskatchewan	1%	1%	3%	▲
Other	5%	0%	2%	▼

Source: XBorder Canada

DATA METHODOLOGY FOR INTERNATIONAL VISITORS

INTERNATIONAL VISITOR ESTIMATES

Canadian visitation estimates were produced by XBorder 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/.

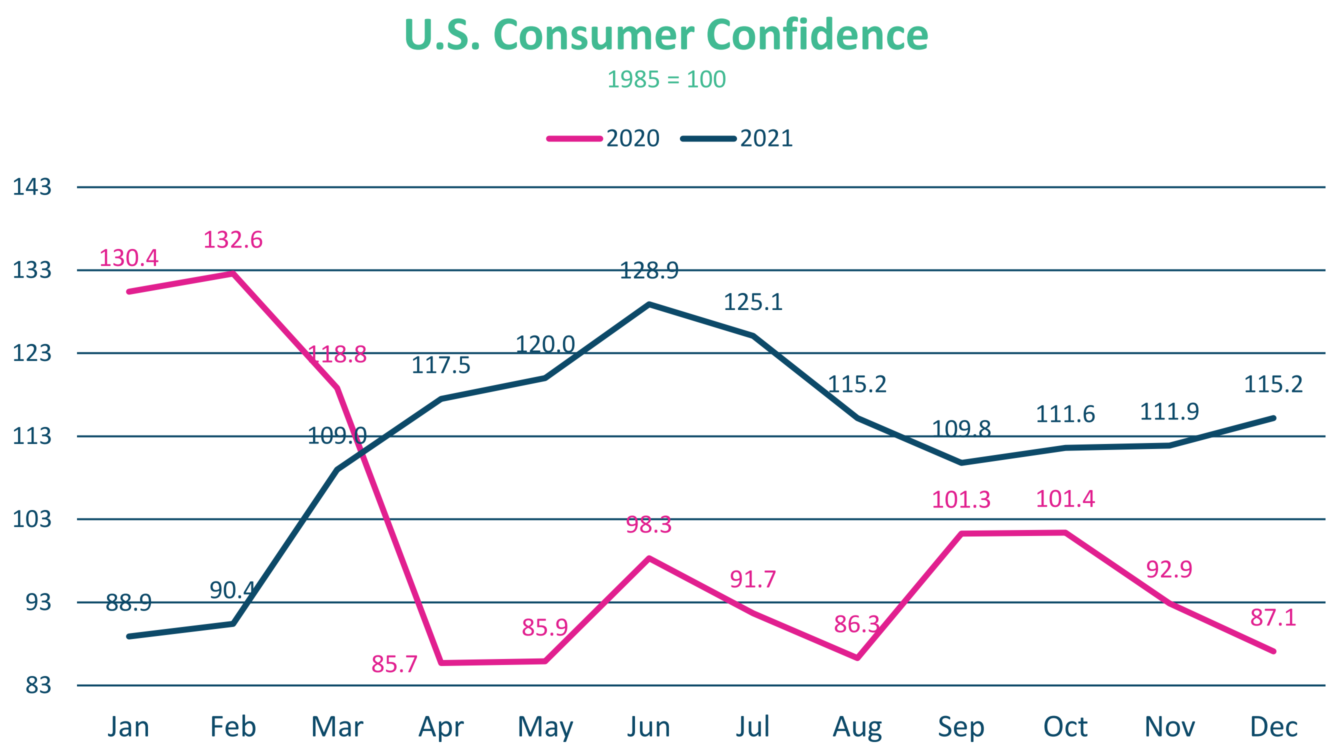
VISIT FLORIDA's analysis of the trends and characteristics of Canadian visitors is based on data from XBorder Canada.

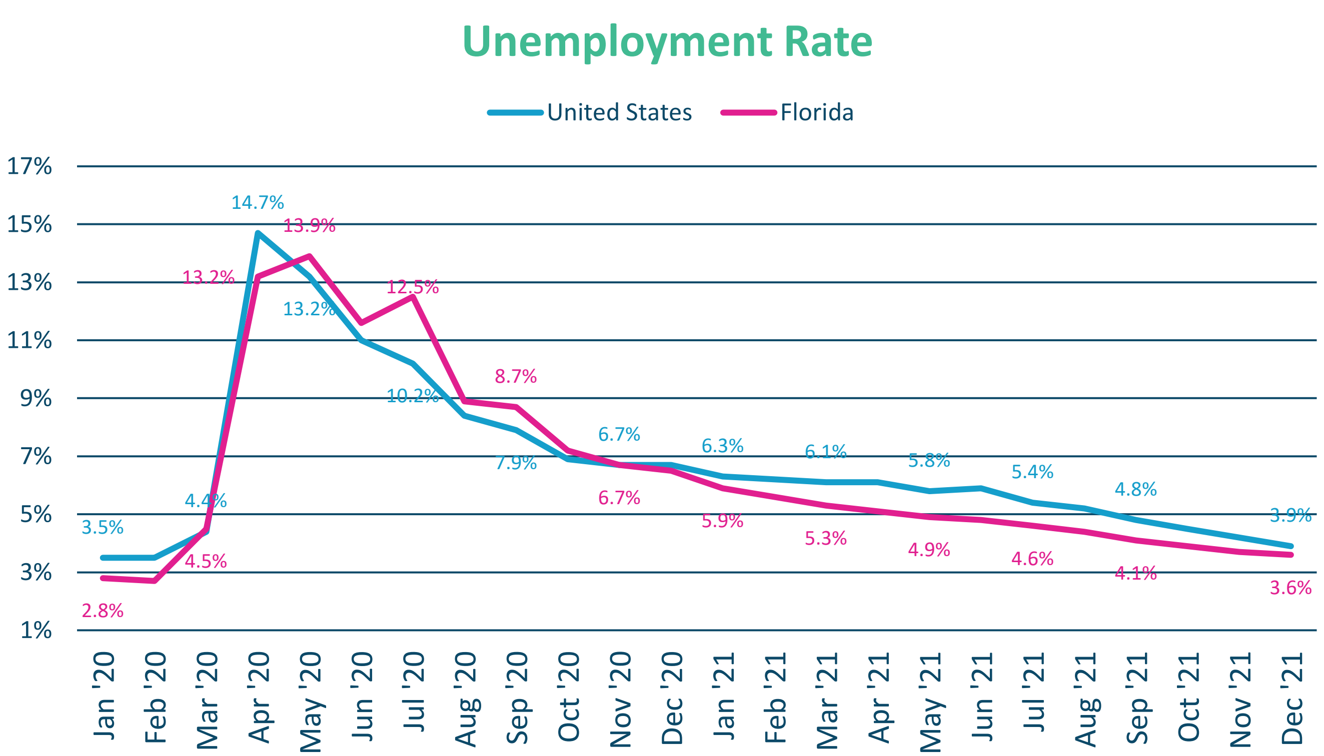
FLORIDA TOURISM INDICATORS

Prepared by VISIT FLORIDA

Research Department

ECONOMIC DATA





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. In 2021, 62 of Florida's 67 counties levied a bed tax.

COUNTY	TAX RATE	2020	2021	% CHANGE '21/'20
Alachua	5.0%	$3,899,172	$6,330,278	62.3%
Baker	3.0%	$47,137	$132,563	181.2%
Bay	5.0%	$23,500,649	$40,340,811	71.7%
Bradford	4.0%	$126,304	$180,903	43.2%
Brevard	5.0%	$12,160,174	$17,710,765	45.6%
Broward	6.0%	$51,546,609	$99,987,989	94.0%
Charlotte	5.0%	$4,474,849	$6,328,667	41.4%
Citrus	5.0%	$1,953,423	$2,588,234	32.5%
Clay	5.0%	$1,052,998	$1,491,805	41.7%
Collier	5.0%	$25,369,230	$38,579,073	52.1%
Columbia	5.0%	$1,266,171	$1,853,266	46.4%
DeSoto	3.0%	$68,742	$88,133	28.2%
Dixie	3.0%	$101,127	$123,600	22.2%
Duval*	6.0%	$16,748,314	$26,560,977	58.6%
Escambia	5.0%	$10,095,286	$19,279,149	91.0%
Flagler	5.0%	$2,503,127	$3,858,264	54.1%
Franklin	3.0%	$1,516,837	$2,660,909	75.4%
Gadsden	2.0%	$118,050	$168,337	42.6%
Gilchrist	3.0%	$114,504	$146,042	27.5%
Glades	2.0%	$14,977	$21,328	42.4%
Gulf	5.0%	$2,556,063	$4,101,005	60.4%
Hamilton	3.0%	$39,653	$48,107	21.3%
Hardee	2.0%	$49,703	$68,083	37.0%
Hendry	3.0%	$243,492	$353,439	45.2%
Hernando	5.0%	$1,083,859	$1,721,255	58.8%

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	2020	2021	% CHANGE '21/'20
Highlands	4.0%	$909,021	$1,186,173	30.5%
Hillsborough	6.0%	$26,761,302	$42,646,818	59.4%
Holmes	3.0%	$74,820	$119,277	59.4%
Indian River	4.0%	$2,832,588	$3,971,933	40.2%
Jackson	4.0%	$372,685	$530,535	42.4%
Jefferson	3.0%	$35,275	$70,288	99.3%
Lake	4.0%	$2,897,653	$4,295,819	48.3%
Lee	5.0%	$37,895,802	$56,192,992	48.3%
Leon	5.0%	$4,090,217	$6,424,327	57.1%
Levy	4.0%	$491,103	$670,887	36.6%
Madison	3.0%	$118,381	$164,521	39.0%
Manatee	5.0%	$15,400,254	$24,544,565	59.4%
Marion	4.0%	$2,633,758	$4,104,965	55.9%
Martin	5.0%	$2,476,274	$3,680,392	48.6%
Miami-Dade*	6.0%	$82,915,856	$109,045,587	31.5%
Monroe*	5.0%	$40,723,001	$95,144,737	133.6%
Nassau	5.0%	$5,670,436	$9,764,261	72.2%
Okaloosa	5.0%	$21,773,236	$37,170,991	70.7%
Okeechobee	3.0%	$341,637	$379,746	11.2%
Orange	6.0%	$115,967,500	$223,592,600	92.8%
Osceola	6.0%	$31,961,613	$50,920,262	59.3%
Palm Beach	6.0%	$37,540,979	$61,848,798	64.8%
Pasco	4.0%	$2,595,215	$3,811,678	46.9%
Pinellas	6.0%	$45,432,408	$80,261,723	76.7%
Polk	5.0%	$10,211,000	$40,052,779	292.3%
Putnam	4.0%	$511,926	$686,708	34.1%
St. Johns	4.0%	$9,547,156	$16,054,108	68.2%
St. Lucie	5.0%	$3,436,499	$5,148,345	49.8%
Santa Rosa	5.0%	$3,686,138	$6,048,826	64.1%
Sarasota	5.0%	$20,585,735	$32,890,382	59.8%

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)

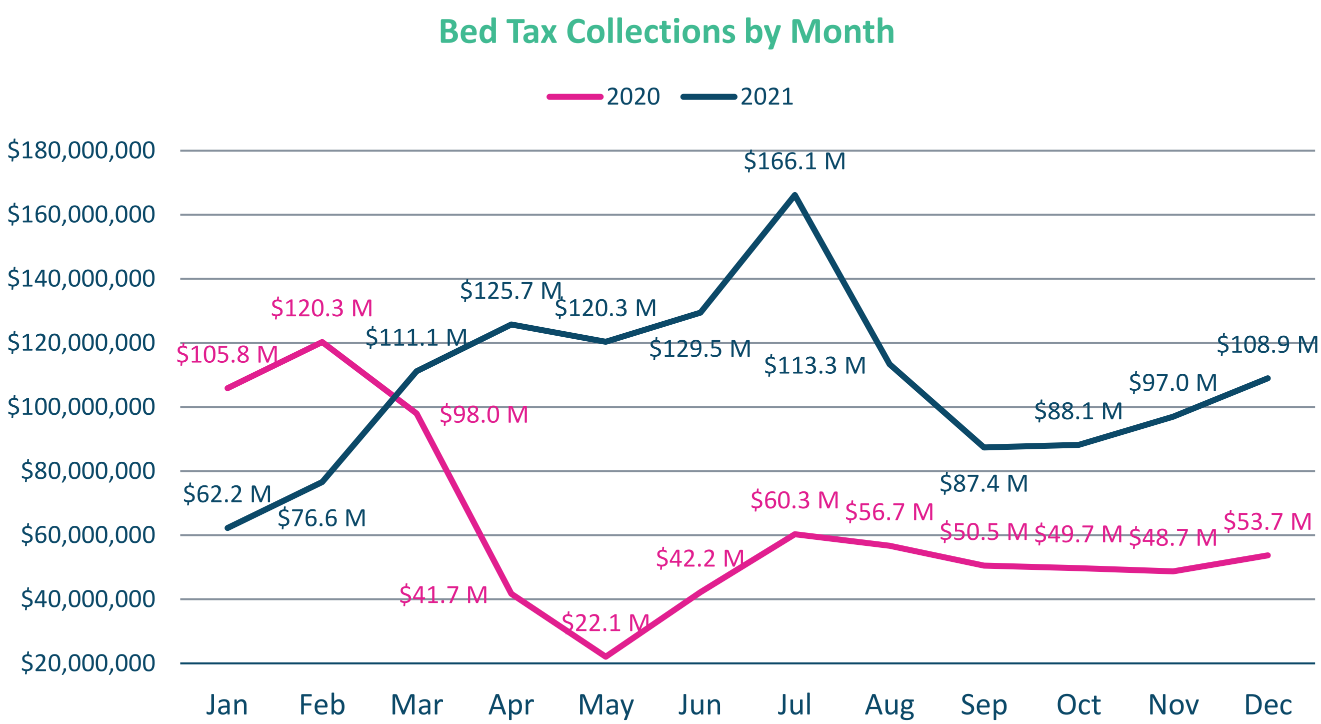
COUNTY	TAX RATE	2020	2021	% CHANGE '21/'20
Seminole	5.0%	$3,474,068	$4,526,884	30.3%
Sumter	0.0%	$643,897	$2,809	-99.6%
Suwannee	3.0%	$189,893	$154,113	-18.8%
Taylor	5.0%	$485,770	$612,312	26.0%
Volusia*	6.0%	$19,343,067	$25,000,204	29.2%
Wakulla	4.0%	$174,263	$265,777	52.5%
Walton	5.0%	$34,768,913	$59,508,213	71.2%
Washington	3.0%	$97,664	$131,448	34.6%
Total		**$749,717,452**	**$1,286,349,767**	**71.6%**

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	2020	2021	% CHANGE '21/'20
January	$105,844,814	$62,238,125	-41.2%
February	$120,261,139	$76,617,742	-36.3%
March	$98,004,919	$111,116,562	13.4%
April	$41,730,946	$125,704,498	201.2%
May	$22,070,647	$120,328,972	445.2%
June	$42,187,899	$129,454,906	206.9%
July	$60,334,991	$166,131,831	175.3%
August	$56,661,470	$113,322,432	100.0%
September	$50,493,976	$87,391,331	73.1%
October	$49,749,925	$88,131,060	77.1%
November	$48,703,346	$97,005,156	99.2%
December	$53,673,380	$108,907,153	102.9%
Total	**$749,717,452**	**$1,286,349,767**	**71.6%**

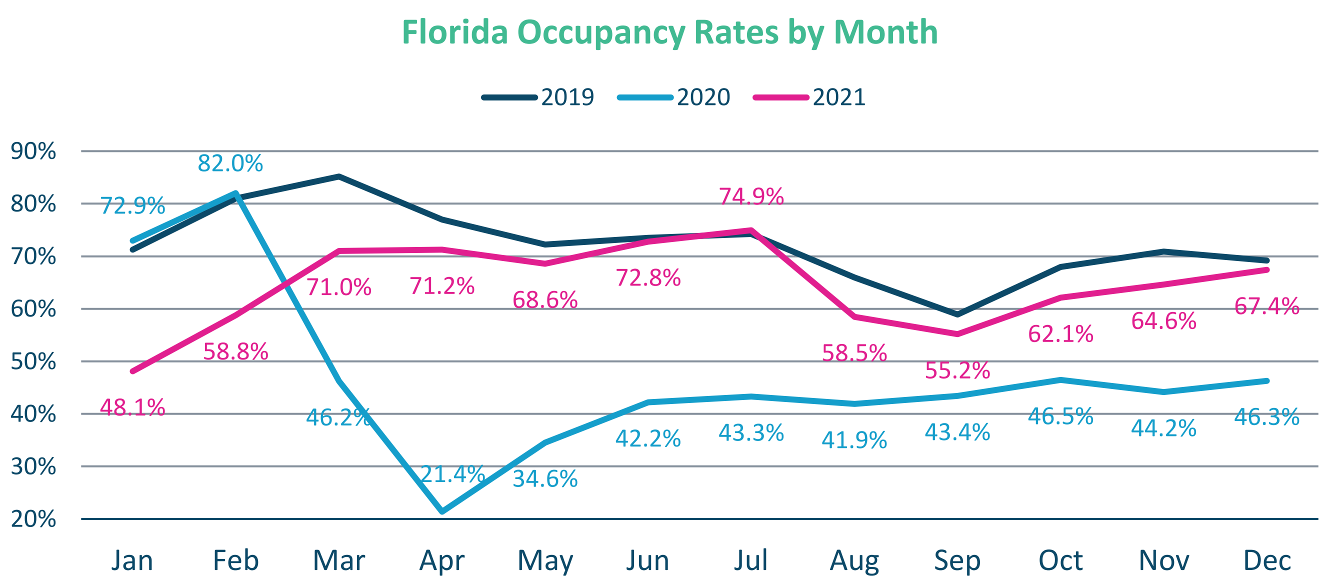


Note: Reported numbers include both Tourist Development Tax and Convention Development Tax collections.
Source: Florida Department of Revenue

HOTEL/MOTEL PERFORMANCE

OCCUPANCY RATES

MARKET	2020	2021	% CHANGE '21/'20
United States	**44.0%**	**57.5%**	**30.8%**
State of Florida	**48.0%**	**64.5%**	**34.4%**
Daytona Beach	49.4%	62.2%	25.8%
Florida Central	50.0%	65.1%	30.1%
Florida Keys	58.6%	79.0%	34.9%
Florida Panhandle	51.6%	64.2%	24.4%
Fort Lauderdale	50.8%	69.2%	36.1%
Fort Myers	49.2%	68.2%	38.7%
Jacksonville	53.1%	68.9%	29.9%
Melbourne	47.6%	60.5%	27.2%
Miami	46.3%	66.8%	44.3%
Naples	45.0%	64.9%	44.1%
Orlando	41.7%	57.7%	38.6%
Sarasota	50.8%	68.2%	34.4%
Tampa	50.9%	68.4%	34.2%
Palm Beach	46.1%	64.3%	39.5%

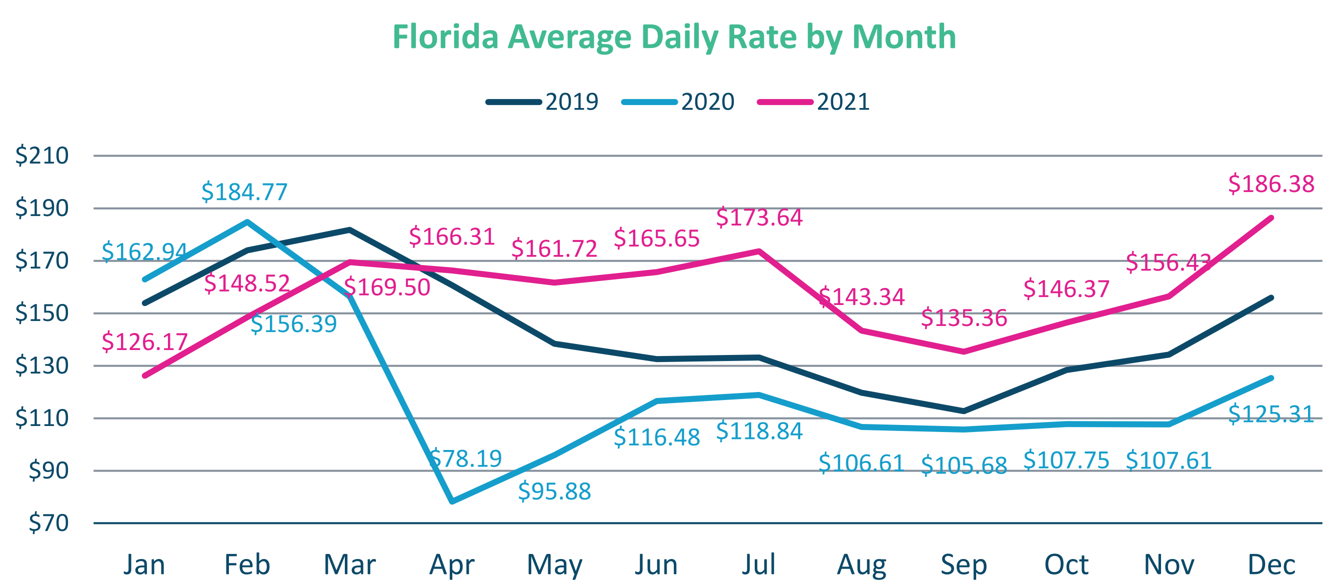


Source: STR

HOTEL/MOTEL PERFORMANCE (CONTINUED)

AVERAGE DAILY RATES

MARKET	2020	2021	% CHANGE '21/'20
United States	**$103.31**	**$124.96**	**21.0%**
State of Florida	**$132.14**	**$158.27**	**19.8%**
Daytona Beach	$114.76	$139.86	21.9%
Florida Central	$118.08	$141.13	19.5%
Florida Keys	$281.64	$389.28	38.2%
Florida Panhandle	$118.94	$155.99	31.2%
Fort Lauderdale	$130.09	$149.66	15.0%
Fort Myers	$156.09	$168.66	8.1%
Jacksonville	$101.07	$123.18	21.9%
Melbourne	$107.24	$113.53	5.9%
Miami	$185.57	$221.96	19.6%
Naples	$241.18	$284.40	17.9%
Orlando	$110.28	$121.35	10.0%
Sarasota	$134.13	$164.07	22.3%
Tampa	$116.81	$139.78	19.7%
Palm Beach	$182.66	$202.18	10.7%



Source: STR

HOTEL/MOTEL INVENTORY

BY COUNTY AS OF JULY 1, 2021

COUNTY	PROPERTIES	ROOMS
Alachua	64	5,683
Baker	4	249
Bay	115	7,819
Bradford	10	358
Brevard	123	10,851
Broward	407	34,501
Calhoun	1	16
Charlotte	29	1,826
Citrus	23	1,208
Clay	13	1,270
Collier	79	8,071
Columbia	27	1,726
DeSoto	4	150
Dixie	9	147
Duval	173	18,443
Escambia	87	7,644
Flagler	19	934
Franklin	11	393
Gadsden	14	447
Gilchrist	2	52
Glades	7	87
Gulf	4	117
Hamilton	5	155
Hardee	4	97
Hendry	13	496
Hernando	17	1,048
Highlands	21	1,267
Hillsborough	227	25,613
Holmes	5	243

COUNTY	PROPERTIES	ROOMS
Indian River	39	2,158
Jackson	16	871
Jefferson	5	179
Lafayette	2	27
Lake	49	2,722
Lee	187	12,676
Leon	68	6,559
Levy	18	336
Liberty	1	12
Madison	4	196
Manatee	70	4,332
Marion	76	4,255
Martin	27	1,707
Miami-Dade	558	60,006
Monroe	193	9,427
Nassau	29	2,320
Okaloosa	70	6,194
Okeechobee	15	593
Orange	328	98,568
Osceola	116	22,197
Palm Beach	186	18,977
Pasco	43	2,798
Pinellas	337	21,705
Polk	121	8,264
Putnam	20	656
Santa Rosa	15	1,155
Sarasota	98	6,823
Seminole	45	4,818
St. Johns	89	6,171

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

HOTEL/MOTEL INVENTORY (CONTINUED)

BY COUNTY AS OF JULY 1, 2021 (CONTINUED)

COUNTY	PROPERTIES	ROOMS
St. Lucie	44	3,225
Sumter	14	1,003
Suwannee	11	345
Taylor	17	530
Union	0	0
Volusia	218	12,599
Wakulla	6	214
Walton	27	2,592
Washington	7	261
Total State	**4,686**	**458,382**

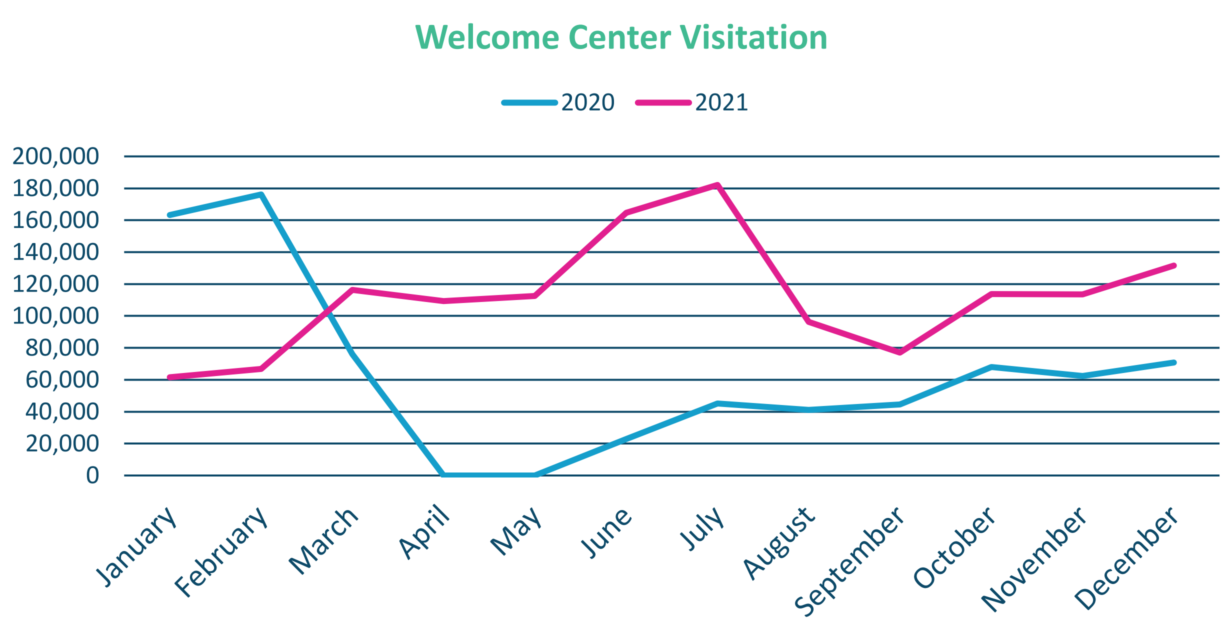
Source: Florida Department of Business and Professional Regulation, Master File Statistics

WELCOME CENTER VISITATION

ALL WELCOME CENTERS COMBINED

MONTH	2020	2021	% CHANGE '21/'20	% OF TOTAL (2021)
January	163,355	61,569	-62.3%	4.6%
February	176,151	66,823	-62.1%	5.0%
March	76,094	116,340	52.9%	8.6%
April	0	109,392	--	8.1%
May	0	112,530	--	8.4%
June	22,877	164,615	619.6%	12.2%
July	45,172	182,109	303.1%	13.5%
August	41,052	96,323	134.6%	7.2%
September	44,506	76,972	72.9%	5.7%
October	68,039	113,815	67.3%	8.5%
November	62,311	113,599	82.3%	8.4%
December	70,887	131,662	85.7%	9.8%
Total	**770,444**	**1,345,749**	**74.7%**	**100%**

Note: All Welcome Centers were closed due to COVID beginning March 13, 2020; I-75 and I-10 Welcome Centers reopened on June 15, I-95 reopened on July 20, 2020. Capitol reopened on May 15, 2021.



Source: VISIT FLORIDA

VISIT FLORIDA®

The Official Tourism Marketing Corporation for the State of Florida

101 N. Monroe Street, 9th Floor

Tallahassee, FL 32301