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Miami-Dade County Industry Updates

November 2026

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In Summary

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- Travel in the United States this year has been driven more by the domestic market, which has been taking more trips and spending more money than last year while international visitation remains sluggish.
- Despite fluctuating currency exchange rates for many of our top international inbound markets, international visitors to Miami are apparently spending far above last year. Canada and France are two exceptions, whose spending has slowed. For all visitors, the biggest year-over-year category spending has been on entertainment and shopping.
- Search demand for travel to Miami by international travelers has been strong all year, with cities in Brazil, Colombia, UK and Argentina among the top markets with the most year-over-year growth.
- High-value travelers are increasingly searching for travel to Miami for Q4 2026 and Q1 2027. Looking ahead from now through Q1 next year, the most growth in travel intent to Miami from these travelers comes from cities in Israel, Italy, Brazil, Germany, Argentina and France.
- Hotel performance has been exceptional and continues to outperform our region, and we should end up with another record-breaking year. The ADR continues to trend far above expectations and demand is holding.
- While reserved lodging occupancy has been very strong for near future, the trend suggests that the booking windows have lengthened and as we get closer to the stay dates, the momentum does not keep up with last year. That said, the booked average daily hotel rate appears to be growing through Q1.

U.S. Travel Insights: September 2026

U.S. TRAVEL ASSOCIATION

Travel spending and overnight stays increased in September, even as **domestic air travel and arrivals from overseas declined.** Travel spending reached $121.6 billion, **up 9.6%** from a year earlier before adjusting for inflation and 0.8% after. U.S. **Travel's Travel Price Index, which measures travel-related prices, rose 8.7% from a year earlier. Strong business and leisure demand, along with favorable holiday timing, helped support travel during the month.**

Demand for hotel rooms rose 5.8%, its strongest growth since February 2023. Demand for short-term rentals rose 8.0%. Demand for group stays at luxury and other high-end hotels increased for a fourth straight month, rising 3.0%; but remained 4.0% below September 2019 levels.

Air passenger volumes fell 2.0%, and **visits to national parks fell 5.9%;** both measures declined for a fifth straight month. **Arrivals from overseas fell 4.3%** and **remained 22.4% below September 2019** levels, leaving them with the largest remaining gap in recovery. The travel trade deficit widened to $4.7 billion in August, the latest month available. **Spending by visitors from abroad fell to $13.5 billion,** while U.S. travelers spent $18.2 billion abroad.

Rising prices continue to put pressure on household budgets. Prices across the economy rose 3.7% in September from a year earlier, compared with 3.4% in August. Consumer sentiment—how people feel about the economy—also remained near record lows.

Source: US Travel Insights Dashboard

Access website here

JetBlue Adds Two New Routes From Fort Lauderdale To Midwest Cities

JetBlue Airways has launched two daily nonstop routes from Fort Lauderdale-Hollywood International Airport to the Midwest as the airline continues expanding its South Florida operations. The New York-based airline launched the service Nov. 2, marking its debut in **Indianapolis and return to Columbus** after an 18-year absence. **JetBlue's new routes operate on Airbus A320 aircraft, with flights departing Fort Lauderdale at 7 p.m. daily. Return flights from Indianapolis and Columbus depart at 6 a.m.**

The **additions are part of JetBlue's broader expansion at Fort Lauderdale,** where the airline expects to operate more than **150 daily departures to 61 nonstop destinations this winter — its largest schedule ever at the airport.** JetBlue has added destinations and increased flight frequencies at Fort Lauderdale throughout 2026 as part of its JetForward strategy, capitalizing on the downfall of Dania Beach-based Spirit Airlines.

In May, the low-cost carrier announced plans to add 11 destinations from Fort Lauderdale. The airline said the new routes will also provide travelers from Indiana and Ohio with **connections to destinations across Latin America and the Caribbean through the Fort Lauderdale gateway**.

According to the U.S. Bureau of Transportation Statistics, **JetBlue transported approximately 6 million domestic passengers through FLL during the 12 months ended July 2026, accounting for 23.4% of the airport's domestic passenger traffic.** The **airline ranked as FLL's largest domestic carrier during that period,** ahead of Spirit Airlines, which accounted for 19.1% of passengers.

Source: South Florida Business Journal, November 9, 2026

Access article here

Miami Gardens Approves Lease For 127-Room Hotel Near Hard Rock Stadium

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The City Council of Miami Gardens, Florida, unanimously approved a lease of city-owned vacant land at 18600 Northwest 25th Avenue to P3 Markets and Beckham Hospitality. The site is part of a roughly 3.5-acre parcel near Hard Rock Stadium.



The plan calls for a **127-room hotel, referred to as the Beckham Hotel Miami Gardens, along with a parking garage. No hotel brand has been announced.**

The hotel and garage would sit next to a performing arts center the city plans to build on the same site, which includes a 1,200-seat theater. City documents describe a larger project that also includes a second hotel. The developer, Phillip L. Beckham III, is a Chicago-based developer.

The site sits about two miles from Hard Rock Stadium, a venue that hosts the Miami Dolphins, University of Miami Hurricanes, the Orange Bowl, a Formula 1 race and the Miami Open tennis tournament. The adjacent property is owned by billionaire Stephen Ross.

Source: ArchiWise. October 29, 2026

Access article here

Foreign Exchange Rates: Versus US Dollar

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From **January 2026 to September 2026, three currencies strengthened against the dollar: the Colombian Peso, Brazilian Real and Mexican Peso. The other five weakened, though for Peru, the UK and Canada the losses were about 1% or less.**

October was a broadly strong month for the US dollar. Seven of the eight currencies lost value against it, and only the Brazilian Real gained, by 1.5%.

The Mexican Peso fell 6.5% in a single month. That's **more than twice its entire gain from January to September. The Euro and Peruvian Sol also lost more in October alone than they had over the previous eight months.**

Country	Jan '26 (per $1)	Sep '26 (per $1)	Jan – Sep YOY	Sep – Oct MOM
Colombia (COP)	3,698.36	3,184.85	Improved, +16.1%	Declined, -0.5%
Brazil (BRL)	5.3524	5.1417	Improved, +4.1%	Improved +1.5%
Mexico (MXN)	17.6862	17.2188	Improved, +2.7%	Declined, -6.5%
Peru (PEN)	3.3576	3.3733	Declined, –0.5%	Declined, -2.1%
United Kingdom (GBP)	0.7402	0.7452	Declined, –0.7%	Declined, -0.9%
Canada (CAD)	1.3787	1.3955	Declined, –1.2%	Declined, -1.3%
Euro (EUR)	0.8524	0.8681	Declined, –1.8%	Declined, -2.6%
Argentina (ARS)	1,449.14	1,513.93	Declined, –4.3%	Declined, -0.6%

Source: XE.com as of November 12, 2026

Q1 - Q3 2026 Visa Card Spend: International Visitors

Country	Spend*	Q3 YTD YOY	Q1 YOY	Q2 YOY	Q3 YOY
Argentina	$148,249,402	27.3%	37.6%	5.7%	41.0%
Brazil	$144,926,065	32.7%	29.0%	40.3%	29.0%
Canada	$131,522,021	-0.3%	-4.5%	3.2%	7.3%
Peru	$102,446,682	30.6%	26.8%	40.2%	25.6%
Colombia	$74,531,047	56.6%	30.1%	73.1%	66.1%
United Kingdom	$72,838,041	28.4%	11.2%	46.3%	28.2%
Mexico	$71,228,766	8.1%	6.5%	-1.4%	19.4%
France	$61,277,132	-4.2%	0.5%	-4.3%	-8.8%
Ecuador	$44,701,461	12.9%	13.2%	18.0%	7.4%
Panama	$43,325,433	-0.1%	-2.5%	1.8%	0.9%
Other countries	$833,026,119	8.6%	11.1%	6.0%	8.8%
Total International	$1,728,072,169	13.7%	12.6%	13.0%	15.5%

Source: Visa Spend Signals

*Includes Visa transactions in Miami-Dade County, excludes direct payments to OTAs (Expedia, Booking.com)

Q1 - Q3 2026 Visa Card Spend: Domestic Visitors

CBSA*	Spend	Q3 YTD YOY	Q1 YOY	Q2 YOY	Q3 YOY
New York	$365,735,926	10.1%	11.5%	6.8%	11.8%
Washington, DC	$101,131,955	13.0%	10.4%	14.1%	14.6%
Los Angeles	$99,251,738	1.5%	-0.4%	4.2%	0.7%
Atlanta	$93,310,381	18.8%	17.1%	18.3%	21.0%
Chicago	$87,349,414	14.4%	15.1%	12.9%	15.2%
Detroit	$79,720,551	19.4%	18.8%	20.9%	18.5%
Houston	$76,839,545	30.5%	27.2%	31.4%	32.5%
Dallas	$72,426,942	36.2%	42.1%	38.7%	28.5%
Philadelphia	$54,576,744	16.8%	17.1%	15.3%	18.1%
Boston	$51,502,207	5.0%	4.8%	4.6%	6.2%
Other markets	$1,381,288,002	25.2%	25.4%	27.8%	21.4%
Total Domestic	$2,463,133,467	20.0%	19.8%	21.1%	18.7%

Source: Visa Spend Signals

*Includes transactions in Miami-Dade County, excludes direct payments to OTAs (Expedia, Booking.com)

Q1 - Q3 2026 Visa Card Spend: By Category, % YOY

Category spending across all segments has been robust. Entertainment and retail have been particularly strong. For international visitors, dining spend increased by 13%.

Fuel was also higher for all types of visitors, albeit at least in part due to increasing gas prices.

Category	International	Domestic (no FL)	FL Resident
Entertainment	*19.4%*	*22.8%*	*13.2%*
Food & Grocery	*6.4%*	*9.5%*	*3.8%*
Fuel	*14.5%*	*19.3%*	*19.6%*
Hotels & Lodging*	*-0.5%*	*3.0%*	*0.5%*
Restaurants & Dining	*13.3%*	*6.1%*	*5.7%*
Retail	*20.6%*	*7.3%*	*12.3%*

Source: Visa Spend Signals **Includes transactions in Miami-Dade County, excludes direct payments to OTAs (Expedia, Booking.com, etc)*

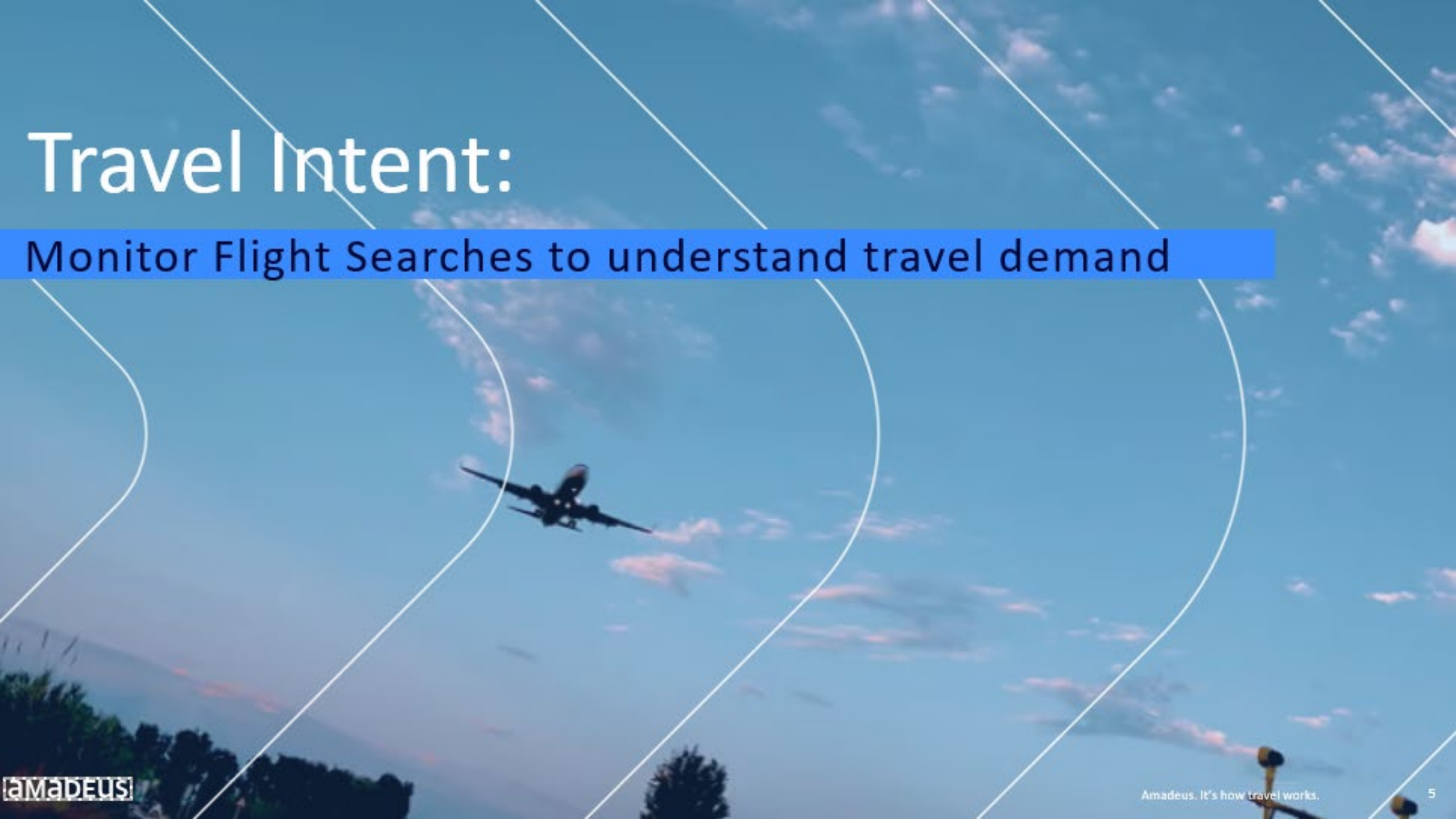
International Air and Hotel travel trends and outlook

Miami Focus - Nov 2026

Amadeus Travel Intelligence

Travel Intent:

Monitor Flight Searches to understand travel demand



Miami focus: Top performing search origins

International flight searches made to Miami between Oct 2025 and Sep 2026; year-over-year variation



Top performing search origins*	% share	YoY variation
Bogota	2.8%	+36%
San Jose	1.2%	+26%
Medellin	1.0%	+25%
Barcelona	1.2%	+23%
Montreal	2.9%	+17%
Mexico City	1.3%	+17%
Toronto	3.9%	+16%
Sao Paulo	8.0%	+7%
Lima	1.6%	+6%
Frankfurt	2.2%	+4%
TOTAL MIAMI	**100%**	+3%

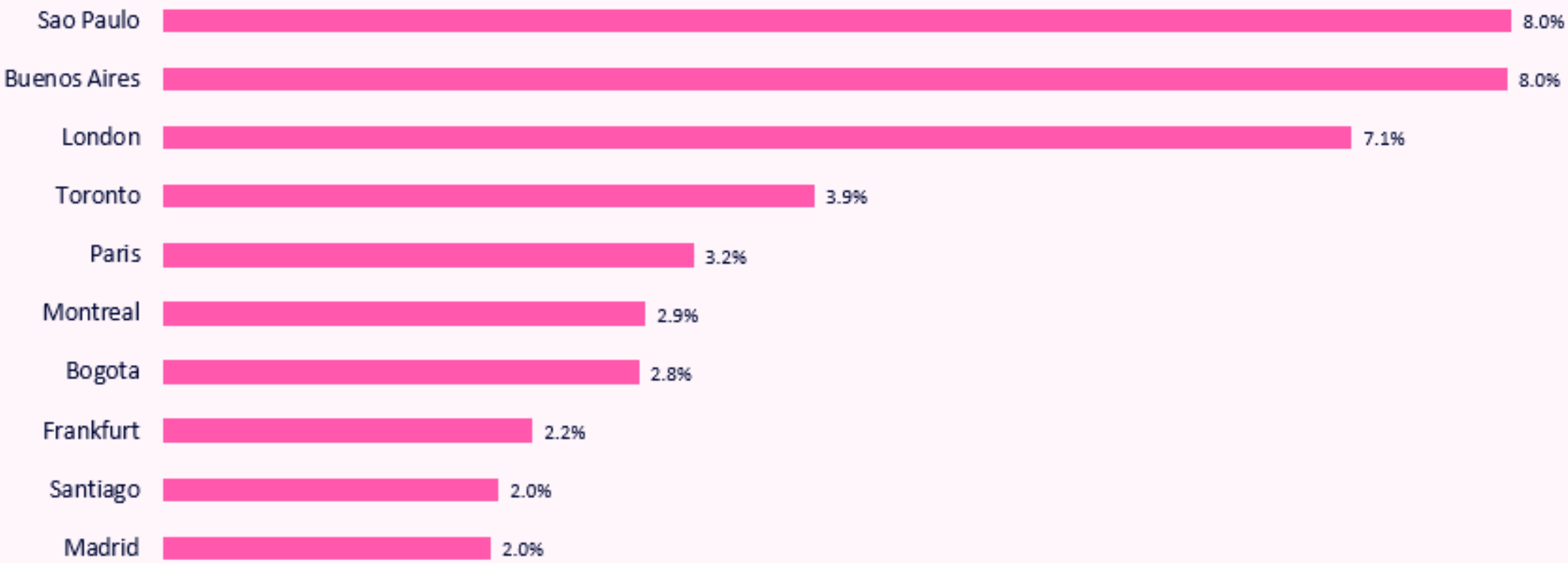
*considering search origins that represent more than 1.0% share

Source: Amadeus Flight Searches

Which trip origins are showing the highest intent to visit Miami?

International flight searches made to Miami between Oct 2025 and Sep 2026

Top search origins (% share of flight searches)



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Source: Amadeus Flight Searches

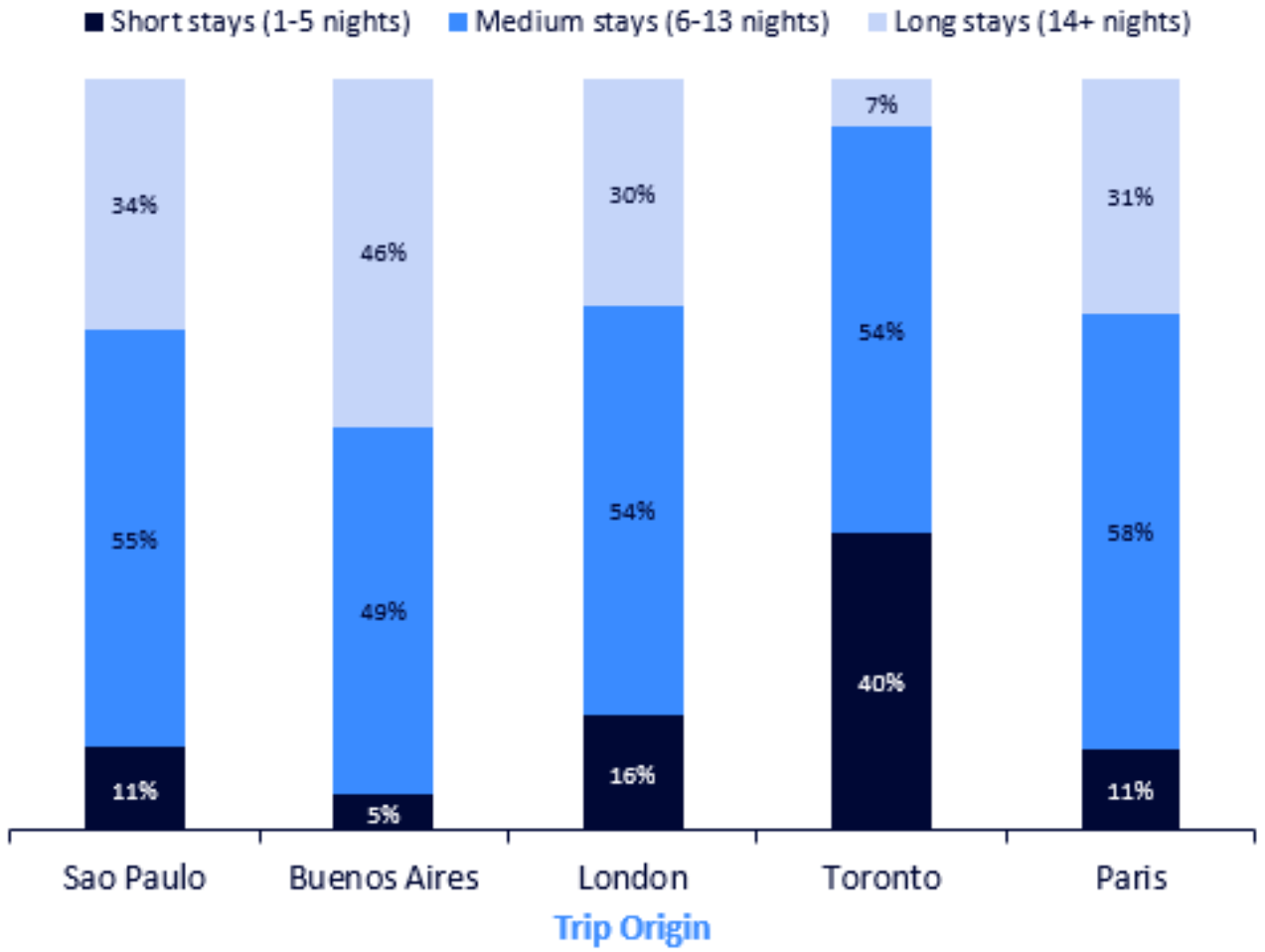
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Different origins have different stay preferences...

...Targeting long stay travelers can have a more positive impact on the destination

How stay length varies by trip origin

International flight searches made to Miami between Oct 2025 and Sep 2026



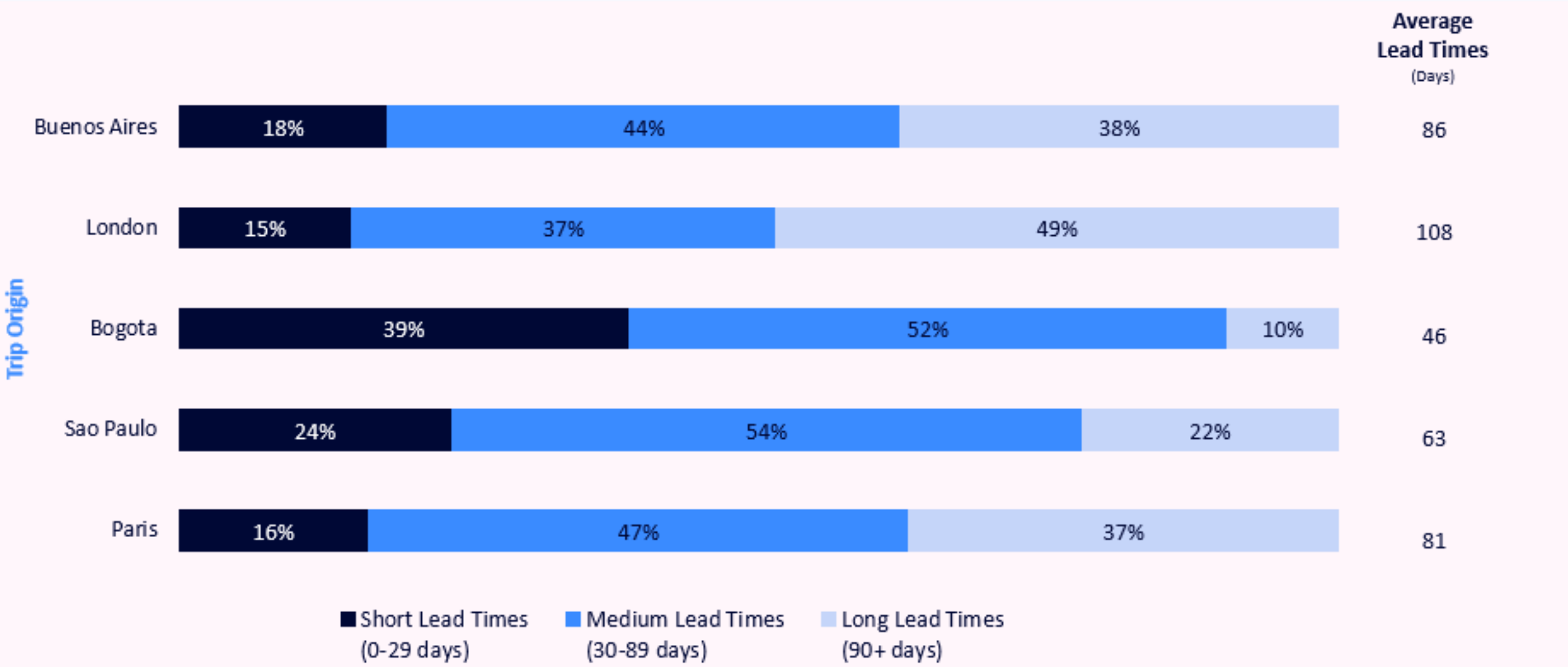
Source: Amadeus Flight Searches

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Different nationalities have different booking patterns

International tourist arrivals to Miami between Nov 2025 and Oct 2026

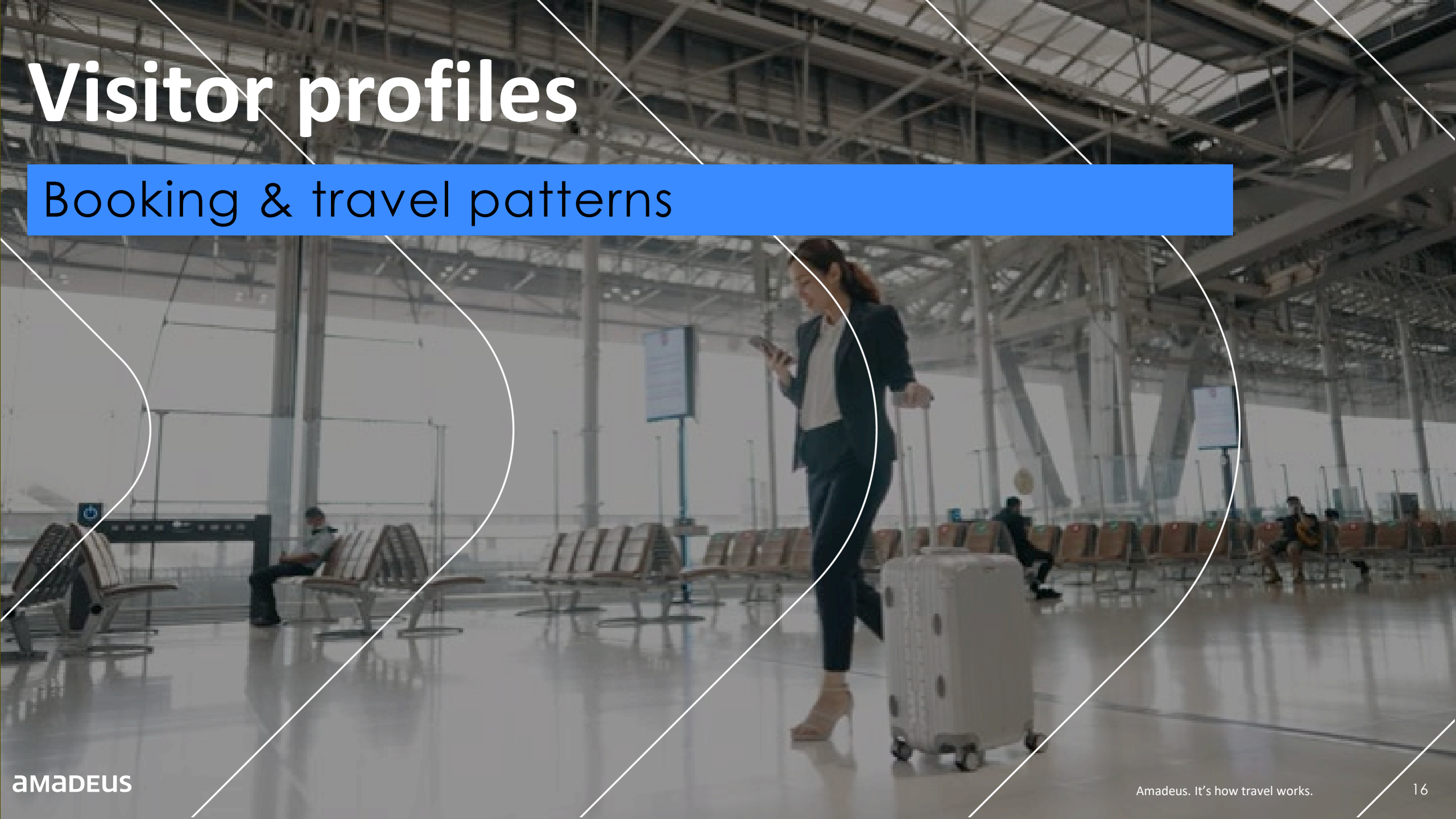


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Source: Amadeus Arrivals and Stays

Visitor profiles

Booking & travel patterns



Future outlook to Miami: High-value travelers are key

International air bookings made to Miami on premium class cabins between Oct 2026 and Mar 2027, as of 29 Oct 2026; year-over-year variation



Top performing trip origins*	Premium Cabins* (YoY variation)
Tel Aviv-Yafo	+89%
Milan	+43%
Sao Paulo	+21%
Frankfurt	+17%
Manchester	+15%
Buenos Aires	+13%
Paris	+11%
Madrid	+6%
Mexico City	+5%
London	+4%

*considering trip origins that represent more than 1.5% share

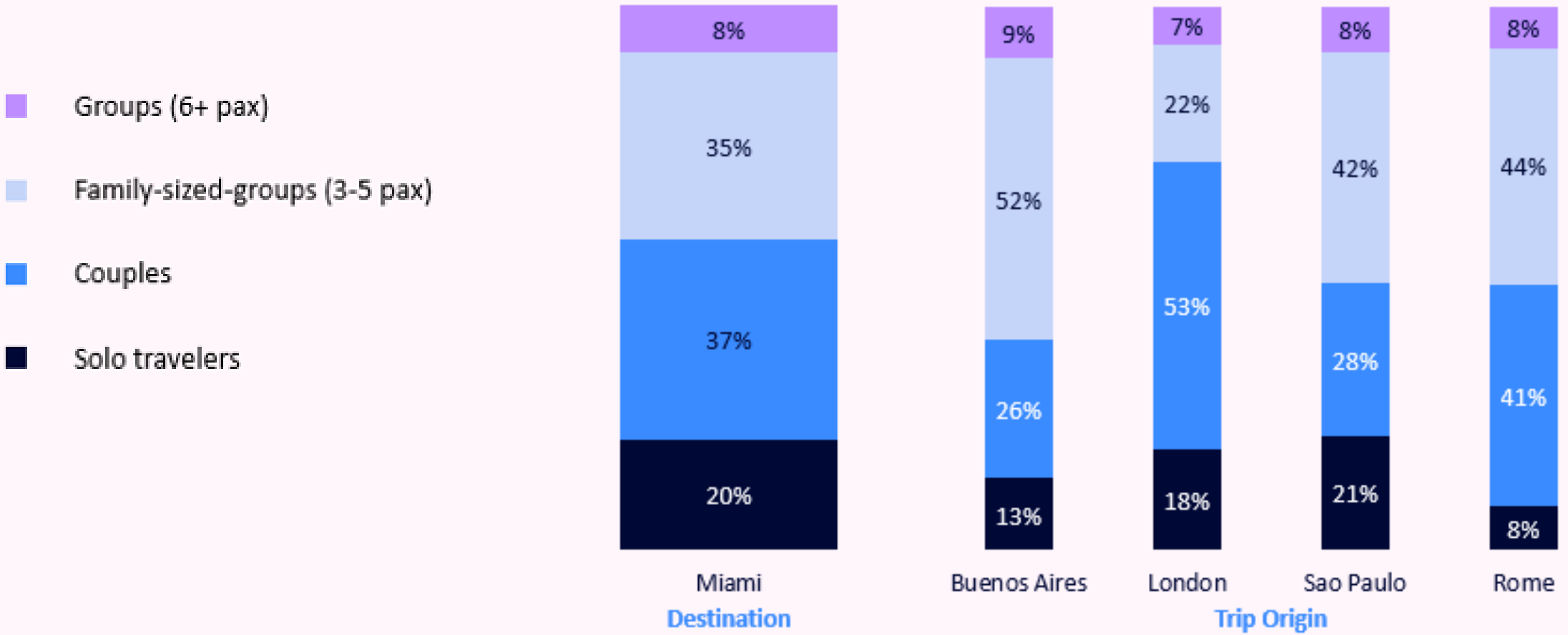
Source: Amadeus Air Visitors

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Understanding traveler profiles: Difference in group size by trip origin

International air bookings made to Miami between Oct 2026 and Mar 2027, as of 29 Oct 2026; year-over-year variation



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Source: Amadeus Air Visitors

Regional Hotel Performance: Past 28 Days Ending November 7

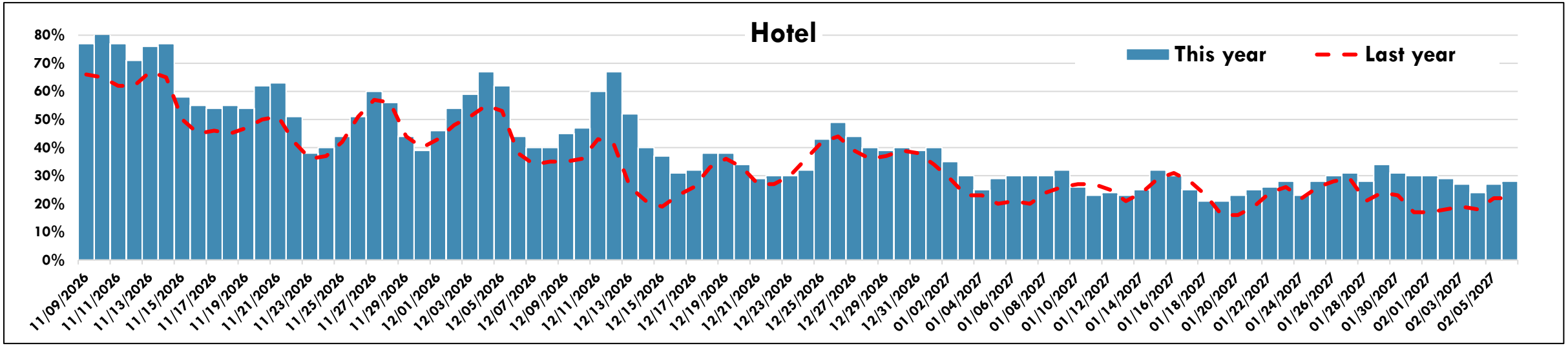
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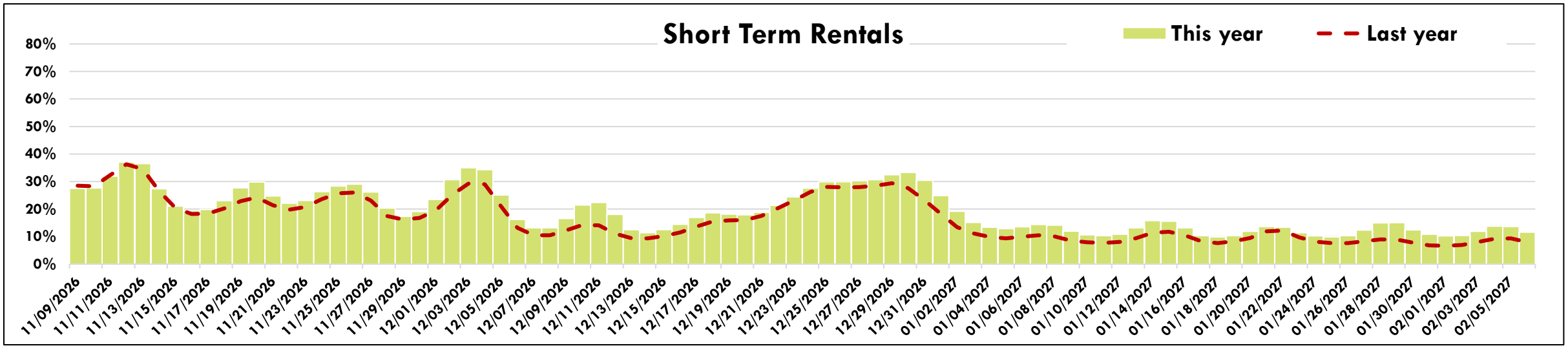
Area	Occupancy	% YOY	ADR	% YOY	RevPAR	% YOY
Miami-Dade	**73.5%**	*1.4%*	**$216.27**	*10.6%*	**$159.05**	*12.1%*
Airport	81.2%	*1.5%*	$133.72	*6.6%*	$108.64	*8.2%*
Aventura/Sunny Isles	66.8%	*1.1%*	$242.23	*6.8%*	$161.82	*7.9%*
Central Dade	77.6%	*0.6%*	$145.36	*16.2%*	$112.75	*16.9%*
Coconut Grove/Key Biscayne	75.2%	*-0.2%*	$277.16	*12.3%*	$208.52	*12.1%*
Coral Gables	77.7%	*9.8%*	$227.80	*13.5%*	$176.92	*24.5%*
Doral	82.2%	*6.0%*	$148.83	*7.0%*	$122.32	*13.5%*
Downtown Miami/Brickell	76.8%	*-0.1%*	$248.31	*14.6%*	$190.67	*14.5%*
Miami Beach	67.6%	*-2.1%*	$271.66	*9.1%*	$183.72	*6.8%*
North Dade	74.9%	*8.2%*	$135.56	*17.5%*	$101.53	*27.1%*
South Dade	68.8%	*8.0%*	$114.63	*30.8%*	$78.91	*41.4%*
Surfside/Bal Harbour	66.7%	*11.0%*	$528.62	*-7.4%*	$352.35	*2.8%*
Broward	71.9%	*4.4%*	$176.44	*0.7%*	$126.81	*5.1%*
Palm Beach	70.9%	*3.4%*	$238.64	*5.9%*	$169.17	*9.4%*
Orlando	73.5%	*1.6%*	$220.81	*5.0%*	$162.26	*6.7%*

Source: STR

Miami-Dade County: 90 Day Reserved Occupancy

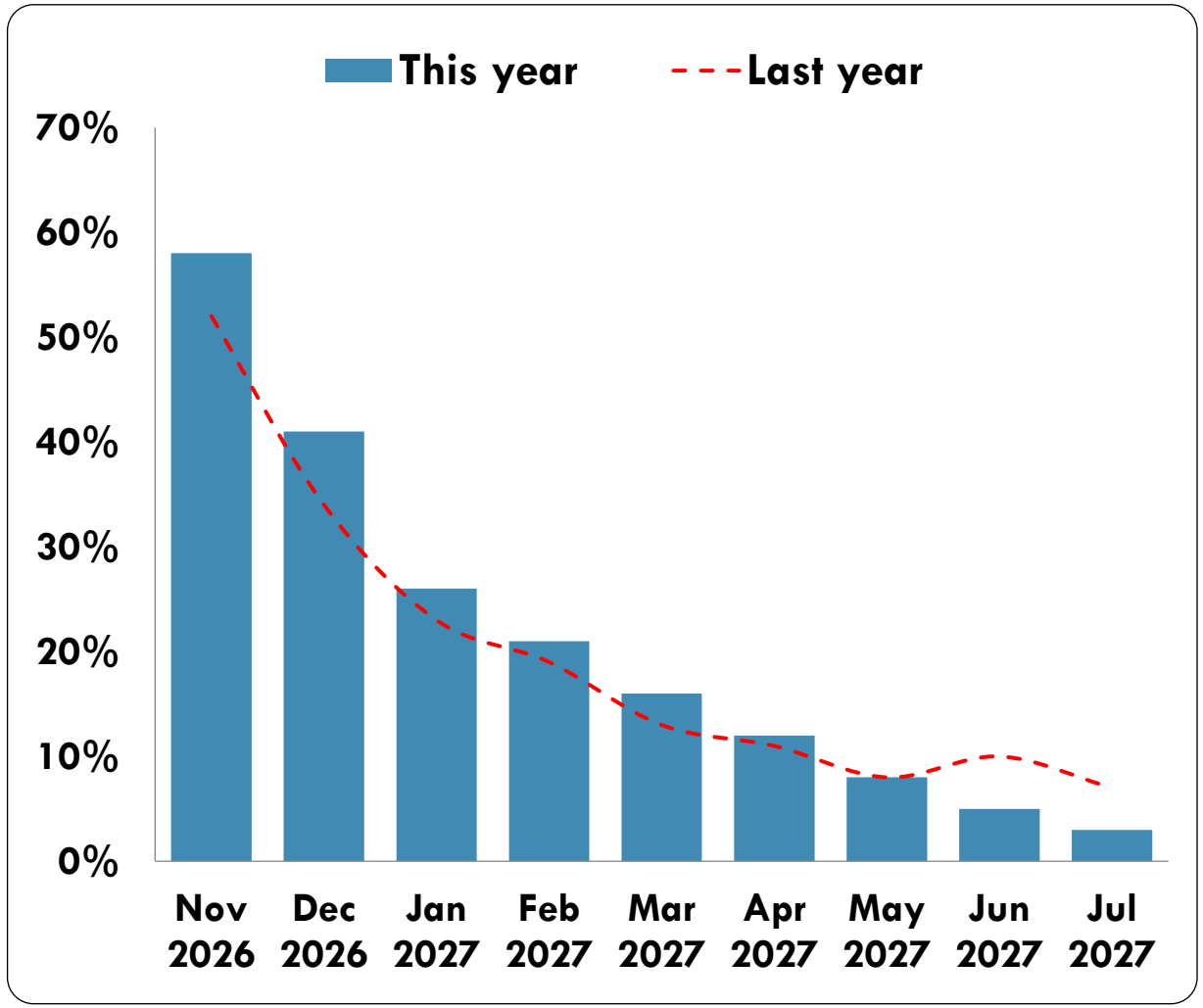
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Source: STR, Lighthouse as of November 9, 2026

Miami-Dade County: Reserved Hotel Occupancy

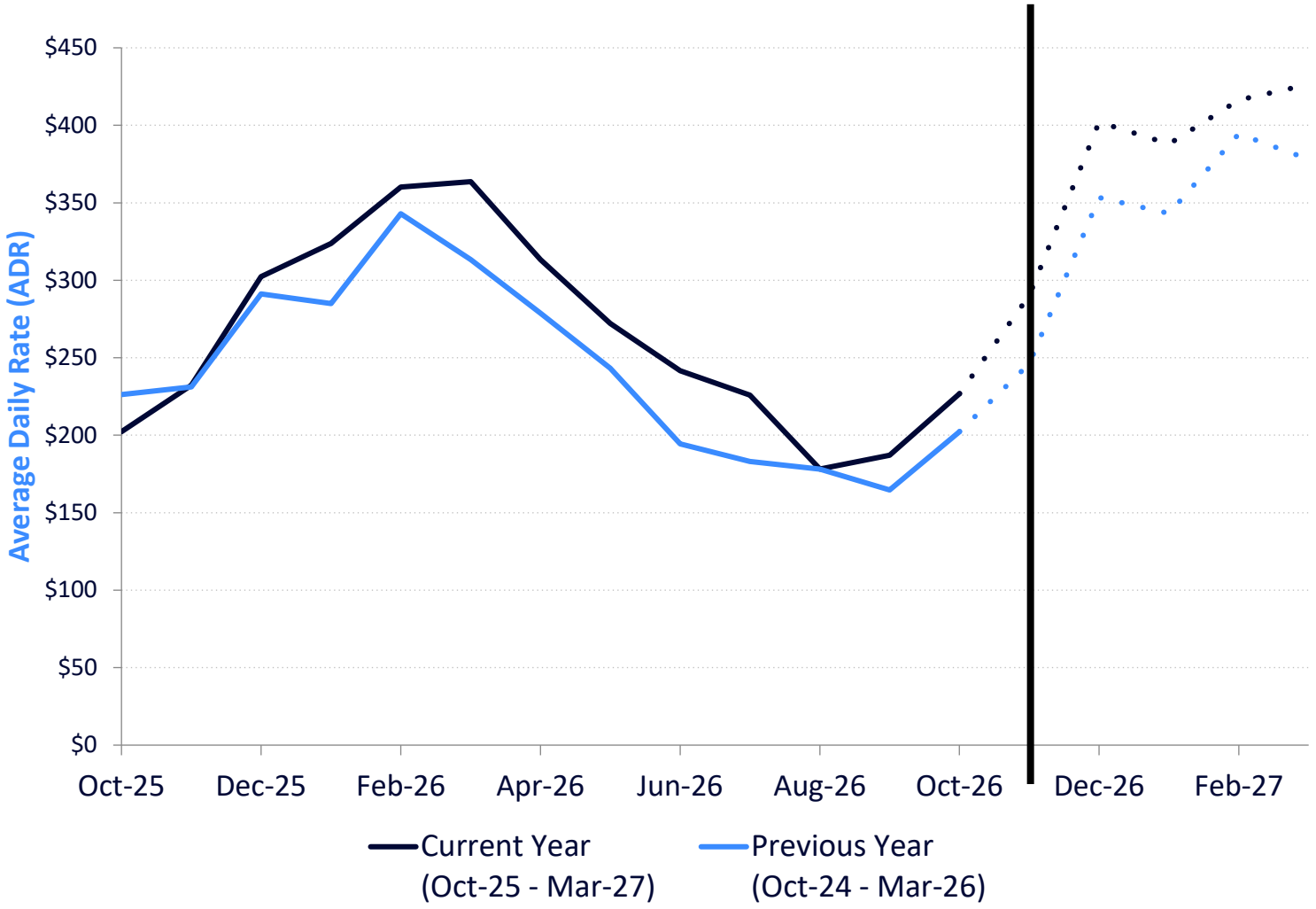


Month	This year	Last year	As of 11/2 % YOY	As of 10/5 % YOY
Nov 2026	58%	52%	12%	25%
Dec 2026	41%	34%	21%	28%
Jan 2027	26%	23%	13%	29%
Feb 2027	21%	19%	11%	27%
Mar 2027	16%	13%	23%	8%
Apr 2027	12%	11%	9%	0%
May 2027	8%	8%	0%	20%
Jun 2027	5%	10%	-50%	-50%
Jul 2027	3%	7%	-57%	-50%

Source: STR, as of November 2, 2026

Average daily hotel rates in Miami

On-the-books ADR between Oct 2025 and Mar 2027, as of 29-Oct-2026; % difference year-over-year (YoY)



Forward Looking Average Daily Rate

(Oct 2026 - Mar 2027)

Miami

$301

Vs previous year

+13%

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Source: Amadeus Demand360®

Thank you!

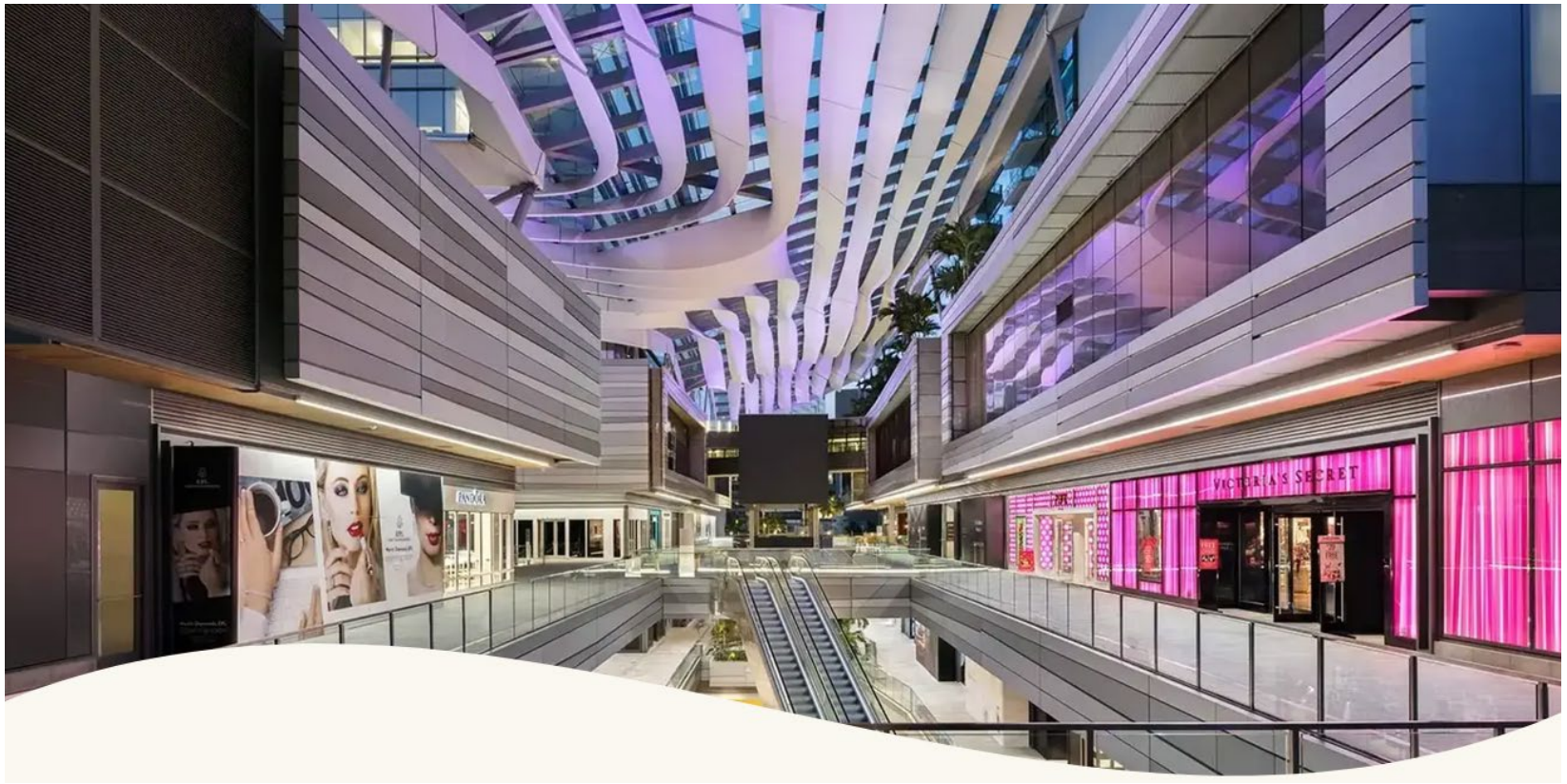


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