GREATER MIAMI & MIAMI BEACH

GREATER MIAMI CONVENTION & VISITORS BUREAU

Miami-Dade County Industry Updates

July 2026

In Summary

- Key performance indicators for the travel industry are generally trending upwards. Oil prices will be important in keeping inflation at bay. We continue to see the effects of a K-shaped economy, an environment that has not, so far, impacted tourism to our destination. Our visitors are eager to spend money.
- The closing of Spirit has had a large impact on FLL, but low-cost carriers are finally moving in. This will not fix FLL's shortage of flights right now; but, expect to see solid recovery through the end of this year.
- Cruise industry - amazing and growing. PortMiami hit a new record this year, 1.1 million passengers in one month. The addition of new ships and service is really paying off.
- Hotel performance nationwide has been positive and we are still up in the top tier. We're on track to have one of, if not our best years ever.
- The World Cup games are finally over. As the dust settles, we see that paid lodging in our destination did very well. This was a rate-driven event and very short-term rental heavy. It looks like once the event hit, hotels quickly adjusted to the short-term demand with high room rates, and this strategy paid off.
    - Value-conscious travelers frequently stayed north of the stadium. While hoteliers in Fort Lauderdale generally did well, their hotels were not able to capitalize on the event anything close to how Miami hotels performed. This was very much a Miami event; visitors overwhelmingly wanted to be in Miami and not outlying areas.

July Outlook – Overall Good News For The Travel Industry

TOURISM ECONOMICS
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Economic trends point to a consistent story: inflation has likely peaked, but risks are lingering rather than resolved, and economic conditions at the household level remain differentiated by income.

- **Good news for consumers: the fall in gas prices will ease the pinch on wallets. Thanks to the slower rate of inflation, growth in real (inflation-adjusted) average hourly earnings is set to turn positive for the first time since February.**
- **But risks remain… Oil prices** have risen following renewed **hostilities between the US and Iran**. Additionally, there are indications that the **AI-driven shortage of memory chips** is starting to push up the **costs of smartphones**, computers, and related products. Thus, we're not out of the woods on the inflation front.

The K-shaped economy remains a key theme. Wealthier households, boosted by roughly $9 trillion in Q1 stock market gains, are propping up high-end housing (sales of $1mn+ homes rose sharply) and discretionary spending.

- **On the other hand, lower- and middle-income consumers face depleted savings, rising delinquencies, tightening bank lending standards, and falling real wages.**
- **Why it matters… the pressures on lower- and middle-income households mean consumer spending is increasingly reliant on higher-income consumers. A pullback in the stock market would change conditions for those households, posing some risk to the outlook for consumer spending.**

Overall, the economic outlook remains solid. Falling oil prices will reduce the drag on real incomes over the second half of the year, and consumer spending will continue to grow, supported by a job market that's broadly in balance.

- **Yes, but** core inflation is now expected to remain above the Federal Reserve's 2% target longer than previously projected. Oil prices may have peaked, but AI-related demand will keep electronics inflation elevated.

New Research: Intel for US Destinations Seeking Canadian Travelers

It's been a turbulent few months, but Canadian travellers know that geopolitical affairs don't define a nation. Interest for U.S. travel may have halved since the last study, but Canadians still want to visit. **These three takeaways from the recent study demonstrate what U.S. destinations need to know about their northern neighbours.**

1. Canadians Need Value

Value was mentioned by 91% of travellers, indicating they are **looking for experiences that are worth the price**. They aren't seeking budget visits, **but Canadians want transparency and clarity, especially among the 65+ segment** (89% said it's important). **U.S. destinations, therefore, need to make their value proposition clear**. **Discounts and special packages will be welcomed**, but so will experiences where the price is justified—think "once in a lifetime."

2. Canadians Want Reassurance

Safety. Safety. Safety. Most (95%) travelers rated a **safe and secure destination as important**. It's no surprise given the geopolitical concerns around the world. But whereas safety used to be only about wars and foreign conflicts, U.S. destinations are now dealing with safety concerns in their own backyards.

3. Canadians Are Family-Oriented

Family vacations (44%) and beach getaways (37%) remain the most desired future trip types. The numbers have dipped since 2020 pandemic-rebound peaks of 56% and 43% respectively. **But the high interest of new categories in the 2026 survey, notably "visiting family and friends," keeps this theme at the top of the list. Nearly a third (29%) of respondents travel to visit family and friends.**

<u>For U.S. destinations, the takeaway is clear: make it all about family. Travellers of all ages and financial means are disproportionately interested in family experiences and beaches, far ahead of romantic holidays or city breaks.</u>

Source: DCI, May 11, 2026 Access article here

JetBlue Launches New Nonstop Flights At Fort Lauderdale

The carrier has just launched eight new nonstop routes from Fort Lauderdale-Hollywood International Airport (FLL) and plans to launch six more routes before the end of the summer. With all the new flight debuts, JetBlue will operate its largest-ever flight schedule at FLL—**the culmination of a larger expansion plan the airline has had underway in recent years.**

Starting on July 9, the airline will begin new service from **Fort Lauderdale to Baltimore, Charlotte, Cleveland, Nashville, Detroit, Houston, Chicago, and Ponce, Puerto Rico**.

With the new launches, **JetBlue says it will operate more than 125 daily departures to more than 55 nonstop destinations from FLL. By winter, the carrier plans to increase its schedule to about 150 daily departures.**

Over the next few months, JetBlue will also add routes to Indianapolis; San Diego; Columbus, Ohio; Cali, Colombia; Barranquilla, Colombia; and Caracas, Venezuela. In addition to adding more flights and destinations to FLL, JetBlue has also focused on expanding its Mint business class service at the hub.

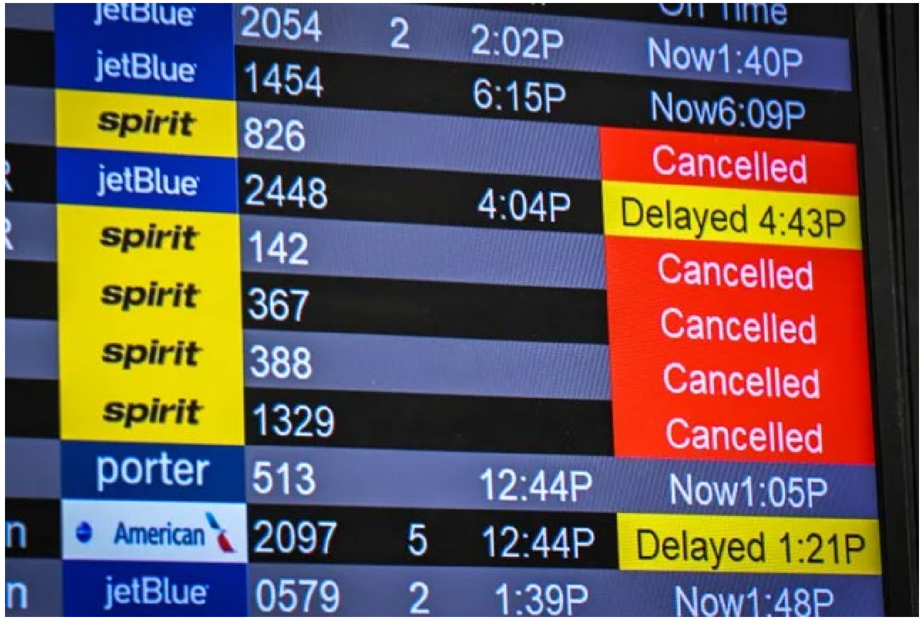
This winter, the carrier is adding more Mint-outfitted flights **from Fort Lauderdale to Los Angeles, San Francisco, and aboard new service to San Diego.**

Source: Travelpulse, July 9 2026 **Access article here**

Frontier Airlines Is Also Adding More Routes At Fort Lauderdale

FRONTIER AIRLINES

Frontier Airlines is adding more routes in Florida — including some to and from Fort Lauderdale — as airlines continue to look to **fill the gap left by the shuttered Spirit Airlines**.



The Denver, Colorado-based carrier announced new flights connecting **Fort Lauderdale to Denver, Orlando and Kansas City, Missouri. Other new routes will run between Detroit and Los Angeles, and between Houston, Texas, and San Juan, Puerto Rico. The Florida flights begin in November, with introductory one-way fares starting at $69 for a limited time.**

The announcements came a week after [Frontier launched eight new routes](#) formerly serviced by Spirit, with four of them connecting Florida airports to other U.S. destinations, in addition to the [23 new routes](#) the airline brought to the Sunshine State in the spring. **Frontier joins carriers including American Airlines, Avianca and JetBlue in adding new flights to Fort Lauderdale, in particular.**

Introductory rates are available if booked through July 20 for non-stop travel on select days of the week through Jan. 4, 2027, with some restrictions.

Source: USA Today, July 16 2026 **Access article here**

MIA & FLL Arrivals – May Year-To-Date

MIA		
Domestic		
Month	**2026**	**% YOY**
January	1,335,996	0.6%
February	1,239,747	-1.0%
March	1,419,392	-2.0%
April	1,241,491	-4.6%
May	1,279,947	-2.0%
Total YTD	6,516,573	-1.8%

FLL		
Domestic		
Month	**2026**	**% YOY**
January	1,200,449	4.5%
February	1,188,495	7.4%
March	1,442,820	11.1%
April	1,176,918	4.7%
May	955,601	-7.6%
Total YTD	5,964,283	4.4%

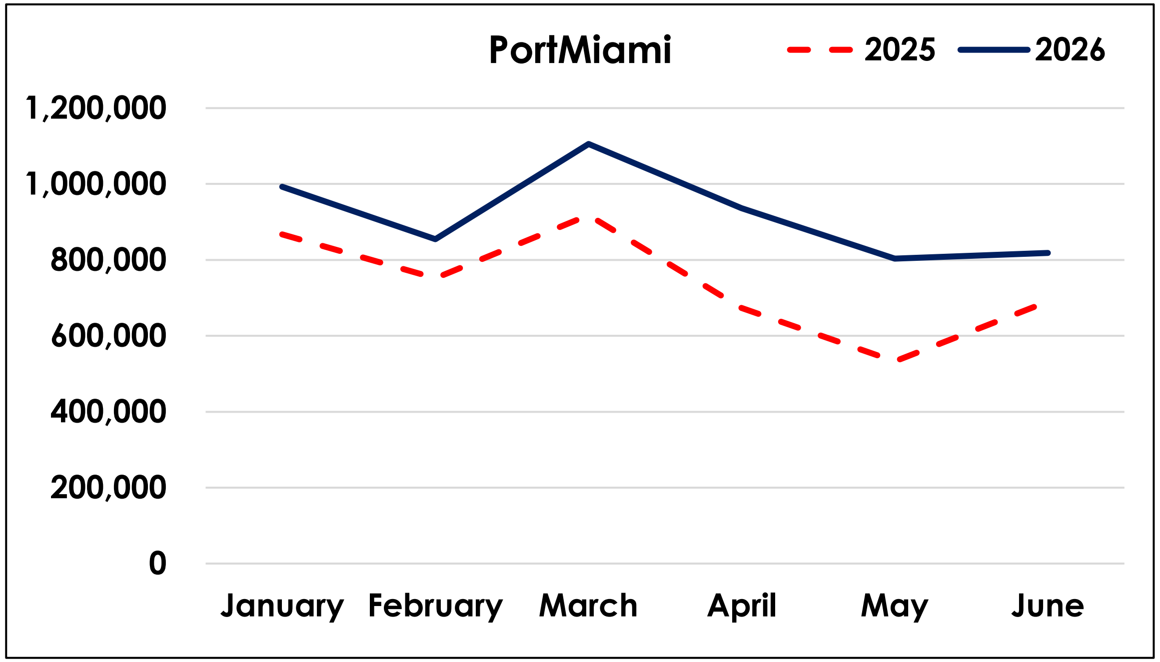
International		
Month	**2026**	**% YOY**
January	1,210,825	0.2%
February	969,063	1.5%
March	1,079,414	-2.2%
April	1,002,977	-1.6%
May	986,218	3.1%
Total YTD	5,248,497	0.1%

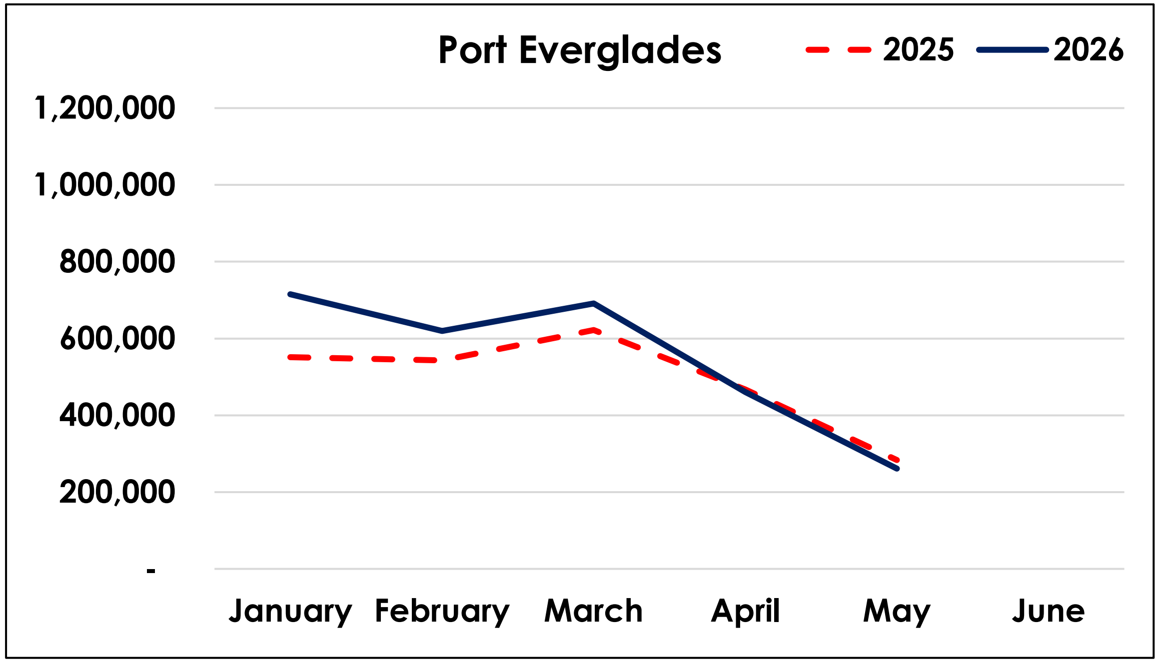
International		
Month	**2026**	**% YOY**
January	308,865	-11.7%
February	274,083	4.8%
March	335,139	14.5%
April	260,901	5.3%
May	155,749	-27.9%
Total YTD	1,334,737	-2.4%

Total Arrivals		
Month	**2026**	**% YOY**
January	2,546,821	0.4%
February	2,208,810	0.1%
March	2,498,806	-2.0%
April	2,244,468	-3.3%
May	2,266,165	0.2%
Total YTD	11,765,070	-1.0%

Total Arrivals		
Month	**2026**	**% YOY**
January	1,509,314	0.7%
February	1,462,578	6.9%
March	1,777,959	11.7%
April	1,437,819	4.8%
May	1,111,350	-11.1%
Total YTD	7,299,020	3.1%

PortMiami & Port Everglades – Monthly Passengers, Year-To-Date





PortMiami		
Month	2026	% YOY
January	992,848	*14.5%*
February	854,529	*13.7%*
March	1,105,472	*20.4%*
April	935,893	*38.9%*
May	803,422	*50.8%*
June	818,524	*18.6%*
Total YTD	**5,510,688**	***24.3%***

Port Everglades		
Month	2026	% YOY
January	715,182	*29.7%*
February	619,562	*14.1%*
March	691,355	*11.2%*
April	460,246	*-1.4%*
May	261,175	*-7.9%*
June	---	---
Total YTD	**2,747,520**	***11.4%***

Sources: PortMiami, Port Everglades

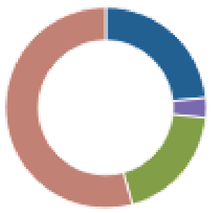
Miami-Dade County – Q1 Domestic Visitor VISA Card Spending

Area	Amount	% YOY
New York	$155,612,326	11.5%
Chicago	$39,083,526	15.1%
Los Angeles	$34,412,115	-0.4%
Washington, DC	$34,200,529	10.4%
Atlanta	$28,105,360	17.1%
Detroit	$28,095,418	18.8%
Boston	$23,009,151	4.8%
Dallas	$22,969,039	42.1%
Houston	$22,676,108	27.2%
Philadelphia	$20,898,768	17.1%
Other markets	$513,308,408	25.4%
Total Domestic	$922,370,745	19.8%

MARKET SEGMENTS

Current Period: JAN (01) – MAR (03) 2026

Here is a breakout of primary market segments and year-over-year change.



		SPEND	YOY % CHANGE
Restaurants & Dining	24%	$1.3 B	+3.8%
Hotels & Lodging	4%	$178.2 M	+2%
Retail	20%	$1.1 B	+4.6%
Other	55%	$3 B	+2.7%

Source: VISA

Miami-Dade County – Q1 International Visitor VISA Card Spending

Country	Amount	% YOY
Canada	$69,736,953	-4.5%
Brazil	$53,568,593	29.0%
Argentina	$52,044,157	37.6%
Peru	$34,739,963	26.8%
United Kingdom	$22,855,592	11.2%
France	$22,251,228	0.5%
Colombia	$20,294,443	30.1%
Mexico	$20,226,712	6.5%
Dominican Republic	$16,985,422	59.3%
Panama	$16,370,825	-2.5%
Other countries	$277,333,143	9.2%
Total International	$606,407,030	12.6%

MARKET SEGMENTS

Current Period: JAN (01) – MAR (03) 2026

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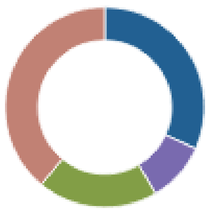


		SPEND	YOY % CHANGE
Restaurants & Dining	32%	$471.3 M	+9.9%
Hotels & Lodging	10%	$145.3 M	+2.9%
Retail	20%	$289 M	+5.5%
Other	39%	$577.9 M	+23.1%

Top 25 US Hotel Markets Performance: January – June 2026

Occupancy				Room Rate				Revenue Per Available Room			
Rank	Region	%	26 vs 25	Rank	Region	$	26 vs 25	Rank	Region	$	26 vs 25
1	New York	80.4%	-1.0%	1	New York	$307.32	5.4%	1	New York	$247.24	4.4%
2	Oahu Island	78.8%	0.4%	2	Miami-Dade	$283.32	12.7%	2	Miami-Dade	$219.44	11.3%
3	Miami-Dade	77.5%	-1.3%	3	Oahu Island	$277.44	-1.2%	3	Oahu Island	$218.58	-0.9%
4	Las Vegas	76.2%	1.0%	4	San Francisco	$262.68	13.1%	4	San Francisco	$191.38	21.9%
5	San Diego	75.7%	4.2%	5	Boston	$232.21	4.0%	5	Orlando	$168.25	5.5%
6	Orlando	75.6%	1.5%	6	Orlando	$222.51	4.0%	6	San Diego	$165.63	8.3%
7	Tampa Bay	74.7%	-2.1%	7	San Diego	$218.78	3.9%	7	Las Vegas	$164.15	7.3%
8	Anaheim	73.8%	4.2%	8	Anaheim	$216.00	6.6%	8	Anaheim	$159.43	11.0%
9	San Francisco	72.9%	7.8%	9	Las Vegas	$215.33	6.2%	9	Boston	$157.68	0.2%
10	Phoenix	72.3%	2.3%	10	Los Angeles	$208.81	5.5%	10	Los Angeles	$149.97	5.1%
11	Los Angeles	71.8%	-0.4%	11	Phoenix	$200.67	3.2%	11	Tampa Bay	$146.47	-3.0%
12	Washington, DC	69.5%	2.4%	12	Washington, DC	$198.23	-0.1%	12	Phoenix	$145.10	5.6%
13	Nashville	68.1%	3.4%	13	Tampa Bay	$196.04	-0.9%	13	Washington, DC	$137.85	2.4%
14	Boston	67.9%	-3.7%	14	New Orleans	$178.50	-9.4%	14	Nashville	$119.98	3.6%
15	Dallas	66.5%	-0.1%	15	Nashville	$176.14	0.2%	15	Seattle	$115.02	1.5%

Source: STR

Miami-Dade Regional Hotel Performance: Past 28 Days Ending July 11

Area	Occupancy	% YOY	ADR	% YOY	RevPAR	% YOY
Miami-Dade	**67.3%**	**-4.5%**	**$235.97**	**33.1%**	**$158.74**	**27.1%**
Airport	72.5%	-7.9%	$145.11	23.2%	$105.13	13.5%
Aventura/Sunny Isles	57.8%	-16.0%	$328.39	38.4%	$189.82	16.2%
Central Dade	74.7%	-1.2%	$143.78	25.8%	$107.38	24.3%
Coconut Grove/Key Biscayne	54.1%	-12.8%	$253.56	33.4%	$137.27	16.3%
Coral Gables	68.0%	2.4%	$216.56	29.3%	$147.21	32.4%
Doral	69.8%	-5.1%	$161.50	27.9%	$112.80	21.4%
Downtown Miami/Brickell	67.8%	0.7%	$263.53	39.0%	$178.70	39.9%
Miami Beach	66.6%	-4.5%	$293.23	32.3%	$195.39	26.4%
North Dade	67.8%	-3.0%	$141.50	36.5%	$95.94	32.5%
South Dade	64.1%	2.4%	$96.19	18.3%	$61.67	21.2%
Surfside/Bal Harbour	59.0%	-6.0%	$723.79	33.5%	$426.83	25.5%
Broward	67.4%	-1.7%	$167.01	9.3%	$112.49	7.4%
Orlando	71.6%	-1.7%	$197.95	4.9%	$141.68	3.1%
Palm Beach	64.7%	1.7%	$213.76	10.2%	$138.33	12.0%

Source: STR

Miami-Dade County Hotel Performance – World Cup Game Days

Weeks 1 – 4, Percent change vs 2025

FIFA World Cup 2026™

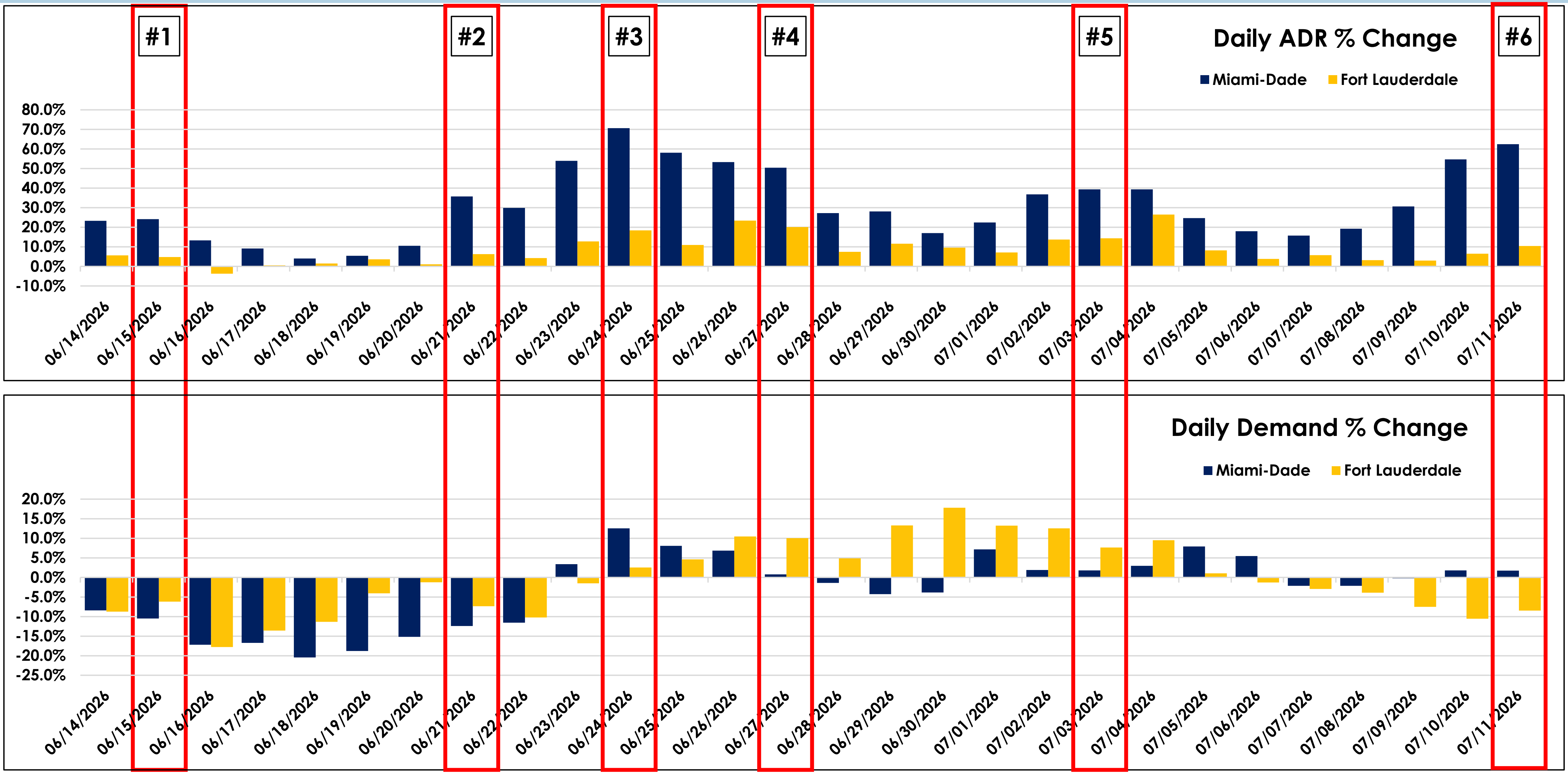
Jun 11, 2026 – Jul 19, 2026

Three-Day Match Window Performance	Occupancy	ADR	RevPAR	Revenue
Aggregate Three-Day Match Window Performance	-3.0%	41.2%	38.2%	39.8%

Three-Day Match Window Performance By Match	Occupancy	ADR	RevPAR	Revenue
Mon, June 15: Saudi Arabia vs Uruguay	-13.0%	20.3%	4.9%	5.9%
Sun, June 21: Uruguay vs Cape Verde	-13.9%	25.4%	8.0%	9.2%
Wed, June 24: Scotland vs Brazil	6.9%	60.9%	72.2%	74.0%
Sat, June 27: Colombia vs Portugal	1.0%	43.7%	45.5%	47.0%
Fri, July 3: Argentina vs Cape Verde	0.7%	38.5%	39.5%	41.6%
Sat, July 11: England vs Norway	0.6%	53.2%	54.1%	56.4%

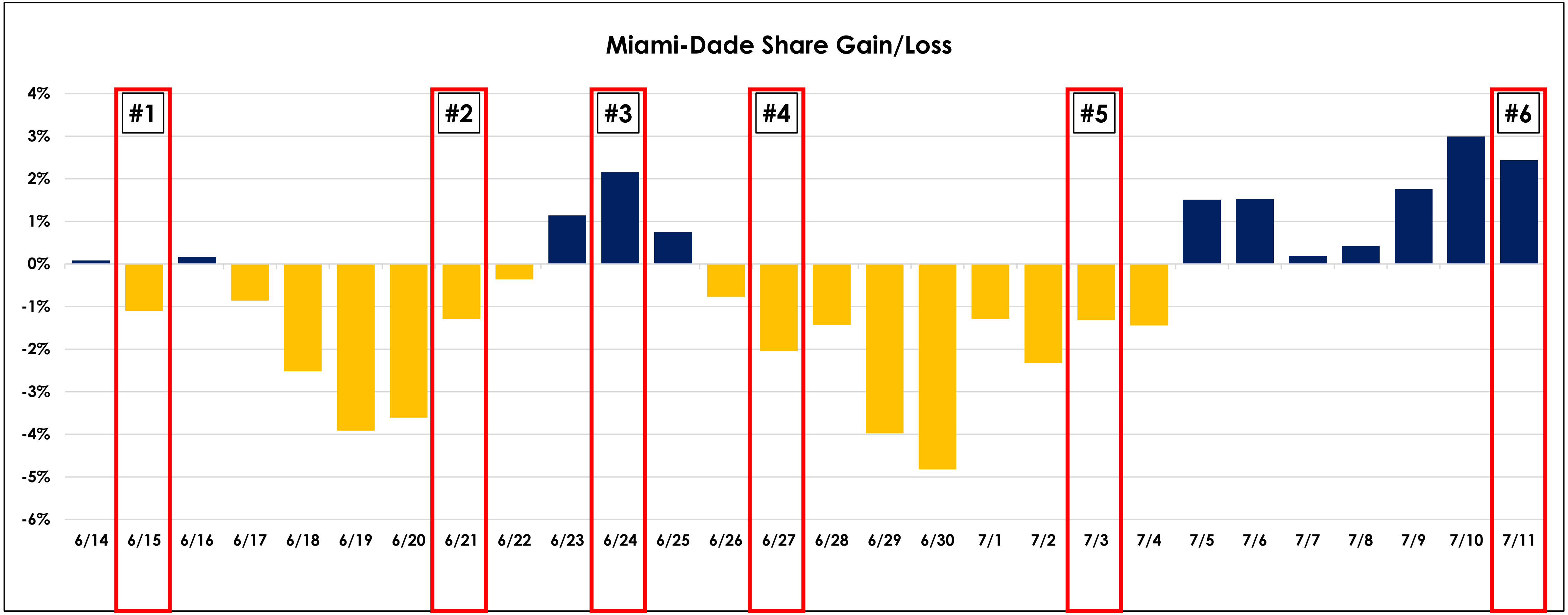
Source: STR

World Cup Daily Hotel Regional Hotel Performance – Miami-Dade & Fort Lauderdale



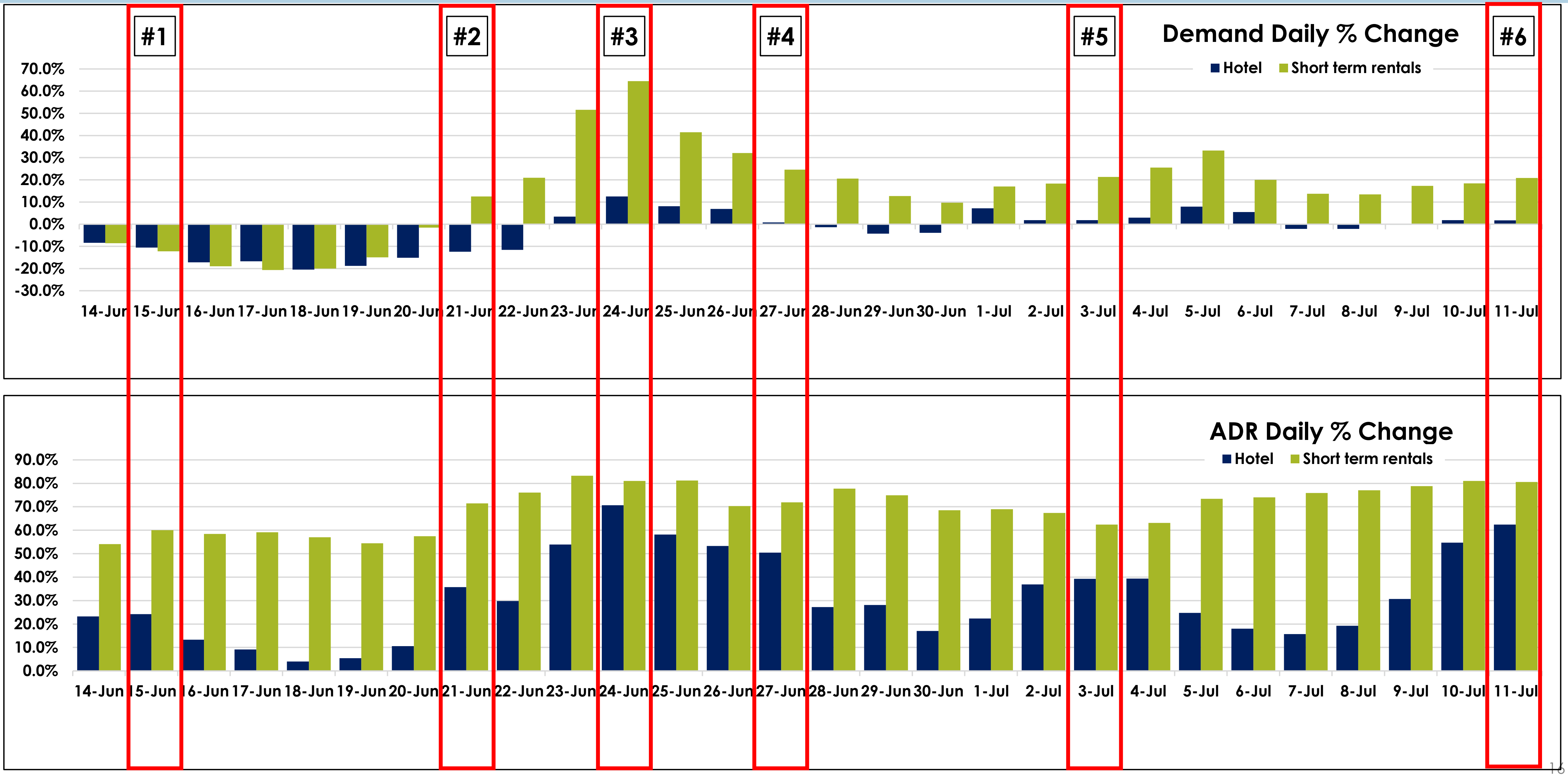
Source: STR

World Cup Daily Hotel Demand Share Gain/Loss – Miami-Dade & Fort Lauderdale



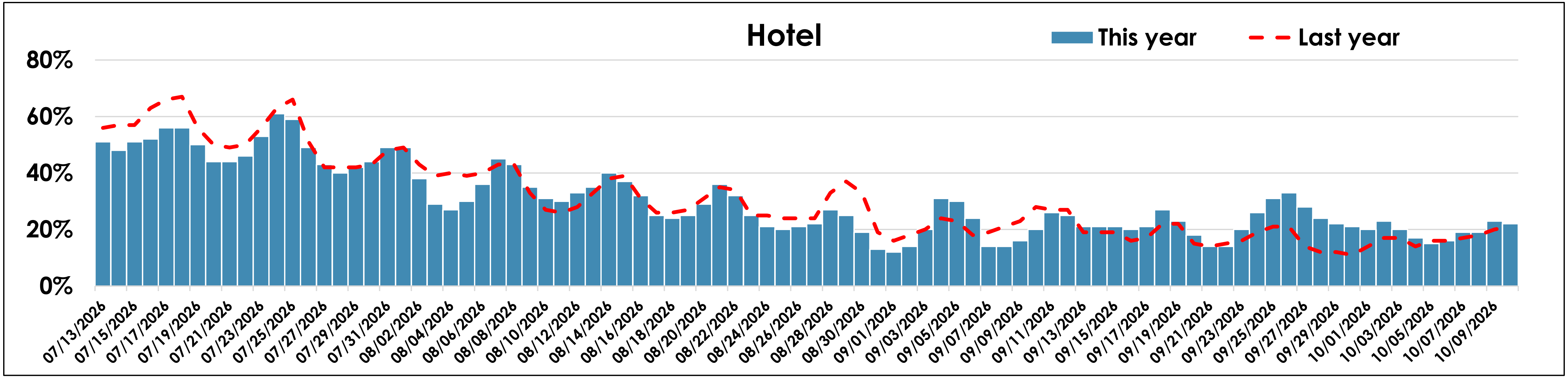
Source: STR

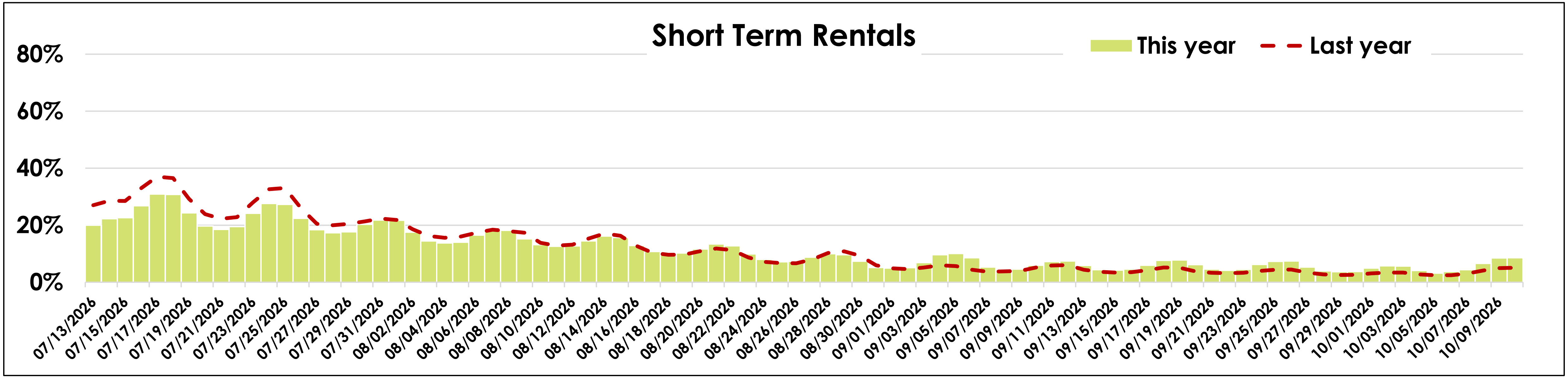
World Cup Miami-Dade Daily Hotel & Short-Term Rental Performance



Source: STR, Lighthouse

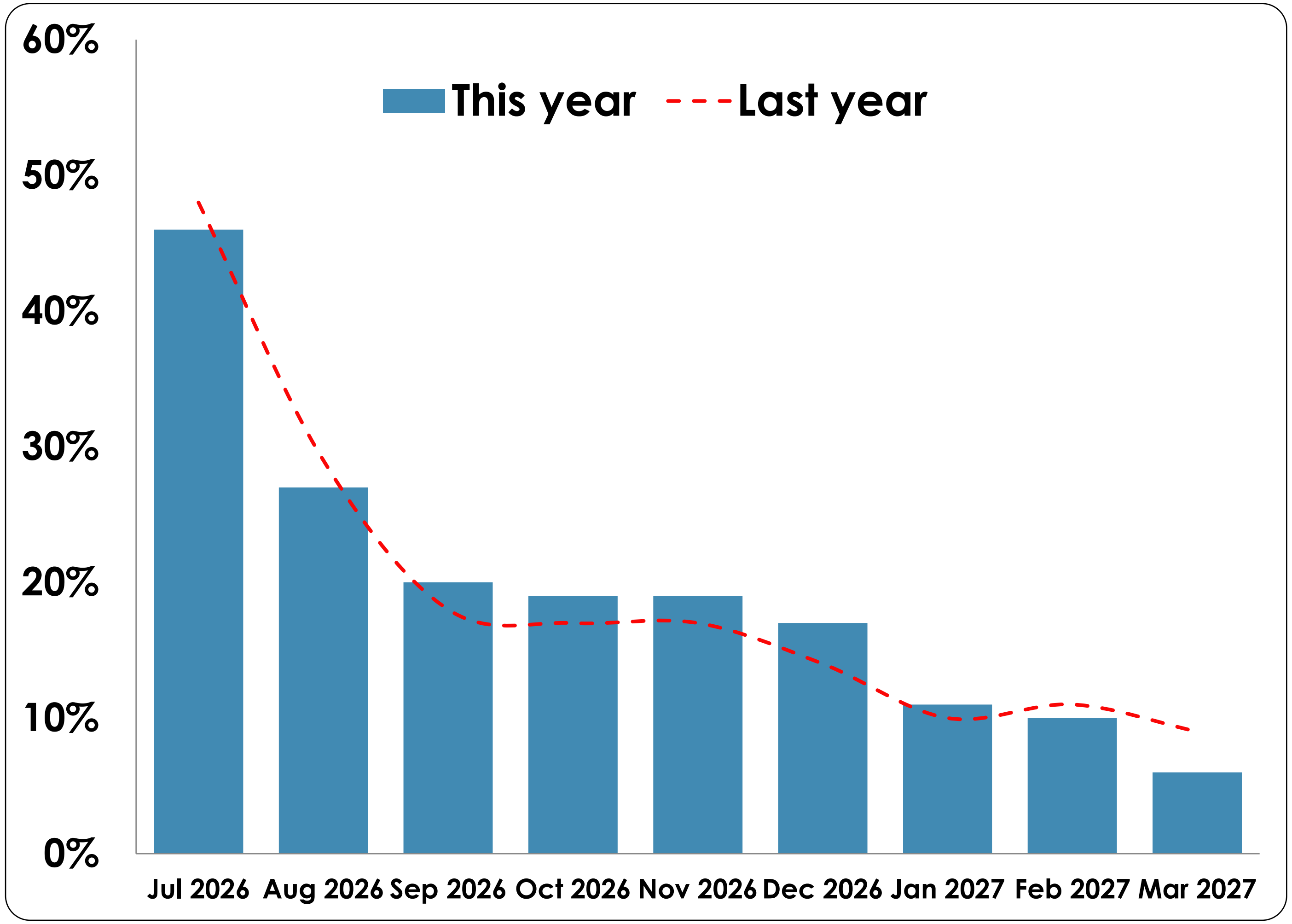
Miami-Dade County Paid Lodging Reserved Occupancy
Next 90 Days





Source: STR, Lighthouse as of June 15, 2026

Miami-Dade County Hotel Reserved Occupancy



Month	This year	Last year	As of 7/6	As of 6/1
Jul 2026	46%	48%	-2	-4
Aug 2026	27%	29%	-2	-4
Sep 2026	20%	18%	+2	0
Oct 2026	19%	17%	+2	-1
Nov 2026	19%	17%	+2	-1
Dec 2026	17%	14%	+3	-1
Jan 2027	11%	10%	+1	-2
Feb 2027	10%	11%	-1	-3
Mar 2027	6%	9%	-3	-3

Source: STR, as of July 6, 2026

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