



Annual Planning Workshop

POWERED BY:



July 2, 2025





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Hotel Market Partnership



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More committed to leisure travel

An increased number of consumers are planning a leisure trip in the next 12 months

JULY 2022

79%



MARCH 2025

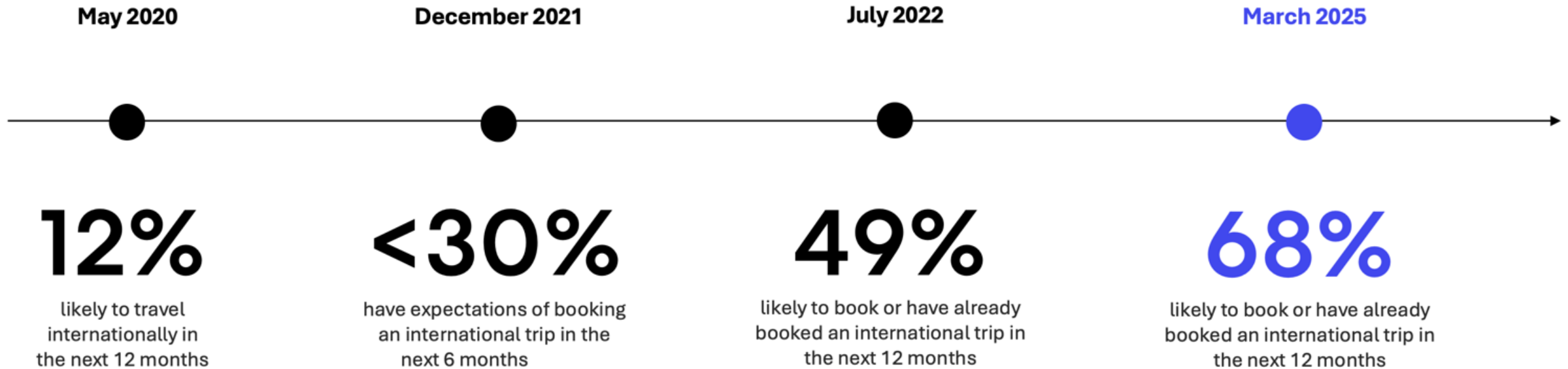
88%

Source: Expedia Group, 2025 Traveler Value Index

International Traveler



Incremental growth of international travel



International Demand - Miami



40%

Traveler Intent

50%

Longer Length of Stays
Longer Booking Window

May 2025, International Arrivals into the U.S.

- Non-U.S. citizen air passenger arrivals to the United States from foreign countries totaled 4.735 million in May 2025, decrease of 5.3% compared to March 2024. This represents 86.3% of pre-pandemic May 2019 volume.
- Total air passenger travel (arrivals and departures) between the United States and other countries were led by Mexico (3.210 million, -2.1 percent Year-Over-Year (YOY)), Canada (2.563 million, -8.3 percent YOY), the United Kingdom (1.959 million, -3.1 percent YOY), Germany (1.044 million, + 2.2 percent YOY), and France (916,000, +4.1 percent YOY).
 - *Canada citizen arrivals to the U.S. were down 12.4 percent compared to May 2024.)*
- International regional air travel to/from the United States:
 - **Europe** totaled 7.473 million passengers, up 2.8 percent over May 2024, and up 5.2 percent compared to May 2019.
 - *U.S citizen departures were up 23.4 percent compared to May 2019, while European citizen arrivals were down 18.4 percent.*
 - **South/Central America/Caribbean** totaled 5.285 million, down 3.8 percent from May 2024, and up 10.3 percent compared to May 2019.
 - **Asia** totaled 2.663 million passengers, up 4.6 percent over May 2024, but down 19.1 percent compared to May 2019.
 - *Asian citizen arrivals to the U.S. were down 35 percent compared to May 2019, and U.S. citizen departures were up 16.8 percent.*

Source: National Travel & Tourism Office (NTTO)

May 2025, International Arrivals into the U.S.

- International visitors spent nearly \$21.6 billion on travel to, and tourism-related activities within, the United States during the month of April, an increase of more than 7 percent compared to April 2024.
- International visitors have spent nearly \$84.7 billion on U.S. travel and tourism-related goods and services year to date (January through April 2025), an increase of 3 percent when compared to the same period last year; international visitors have injected, on average, nearly \$706 million a day into the U.S. economy this year.

Source: National Travel & Tourism Office (NTTO)



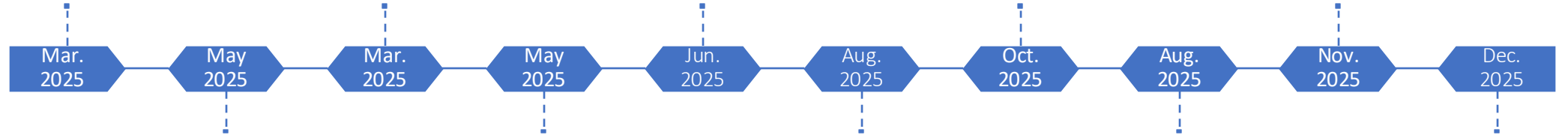
American Airlines: South Caicos, Turks and Caicos (March 2025), Rome, Italy (June 2025)

AeroMexico: Cancun, Mexico

GOL: Belem, Brazil

Icelandair: Reykjavik, Iceland

Viva Aerobus: Mexico City AIFA, Mexico



Arajet: Punta Cana, Dominican Republic (May 2025), Santo Domingo, Dominican Republic (May 2025)

Avianca: Guatemala City, Guatemala

Spirit Airlines: Atlantic City, NJ

Frontier: Austin, TX; Washington Dulles, DC and Aguadilla, Puerto Rico

LATAM: Buenos Aires, Argentina



Visitors Industry Overview 2024 – Overnight Visitors



International Overnight Visitors							
COUNTRY	2019 Volume (000s)	2020 Volume (000s)	2021 Volume (000s)	2022 Volume (000s)	2023 Volume (000s)	2024 Volume (000s)	VS 2023 (%)
Colombia	374	144	425	423	403	434	8%
Brazil	440	118	46	286	342	382	12%
Canada	351	150	29	251	296	283	-4%
United Kingdom	321	54	40	209	222	245	10%
Mexico	203	79	183	223	198	225	13%
Spain	205	41	46	183	165	182	10%
Germany	296	31	38	164	170	182	7%
Argentina	285	79	117	172	164	175	7%
France	216	54	37	132	148	163	10%
The Bahamas	163	51	62	107	134	132	-2%
Ecuador	205	70	133	154	135	124	-8%
Dominican Republic	92	60	119	143	128	113	-12%
Peru	90	39	86	95	110	110	0%
Venezuela	169	37	67	113	106	104	-2%
Honduras	62	23	75	89	77	79	3%
Trinidad and Tobago	90	16	18	77	64	76	19%
Chile	102	52	49	83	77	72	-6%
Nicaragua	28	18	26	31	61	68	11%
Panama	66	32	52	60	64	63	-1%
Costa Rica	67	35	66	71	59	56	-5%

Visitors Industry Overview 2024 – Overnight Visitors

Domestic Overnight Visitors							
MARKET	2019 Volume (000s)	2020 Volume (000s)	2021 Volume (000s)	2022 Volume (000s)	2023 Volume (000s)	2024 Volume (000s)	VS 2023 (%)
New York City	1,364	752	1,663	1,923	1,987	1,857	-7%
Chicago	385	234	461	481	546	685	25%
Atlanta	380	237	485	581	606	553	-9%
Los Angeles	276	139	221	384	395	476	21%
Dallas	223	149	330	338	368	404	10%
Philadelphia	349	164	323	387	371	403	8%
Boston	208	142	271	359	305	318	4%
Washington, DC	299	135	281	347	305	289	-5%
Detroit	141	106	208	243	231	247	7%
Houston	191	125	306	305	292	233	-20%
Denver	104	66	140	156	155	173	11%
Charlotte	86	77	157	175	178	161	-9%
Cleveland	100	53	104	121	115	127	10%
Greenville	68	43	74	115	113	115	2%
Indianapolis	67	43	85	101	94	113	21%
Minneapolis	110	69	109	132	99	111	12%
Raleigh	85	55	107	134	120	109	-10%
Baltimore	77	48	111	127	111	108	-3%
New Orleans	57	36	98	115	102	92	-10%
Nashville	105	43	92	109	104	91	-13%

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Top searched destinations

*New top 10 searched destination

For APAC travelers

- Tokyo, Japan
- Sydney, Australia
- Melbourne, Australia
- Seoul, South Korea
- Osaka, Japan
- Singapore
- Gold Coast, Australia
- Fukuoka, Japan
- Incheon, South Korea
- Taipei, Taiwan

For EMEA travelers

- London, England
- Paris, France
- Istanbul, Türkiye
- Dubai, UAE
- New York, New York
- Rome, Italy
- Amsterdam, Netherlands
- *Barcelona, Spain**
- *Lisbon, Portugal**
- *Palma de Mallorca, Spain**

For LATAM travelers

- Mexico City, Mexico
- Cancun, Mexico
- Sao Paulo, Brazil
- Rio de Janeiro, Brazil
- Puerto Vallarta, Mexico
- Playa del Carmen, Mexico
- Madrid, Spain
- *Paris, France**
- New York, New York
- *Mazatlán, Mexico**

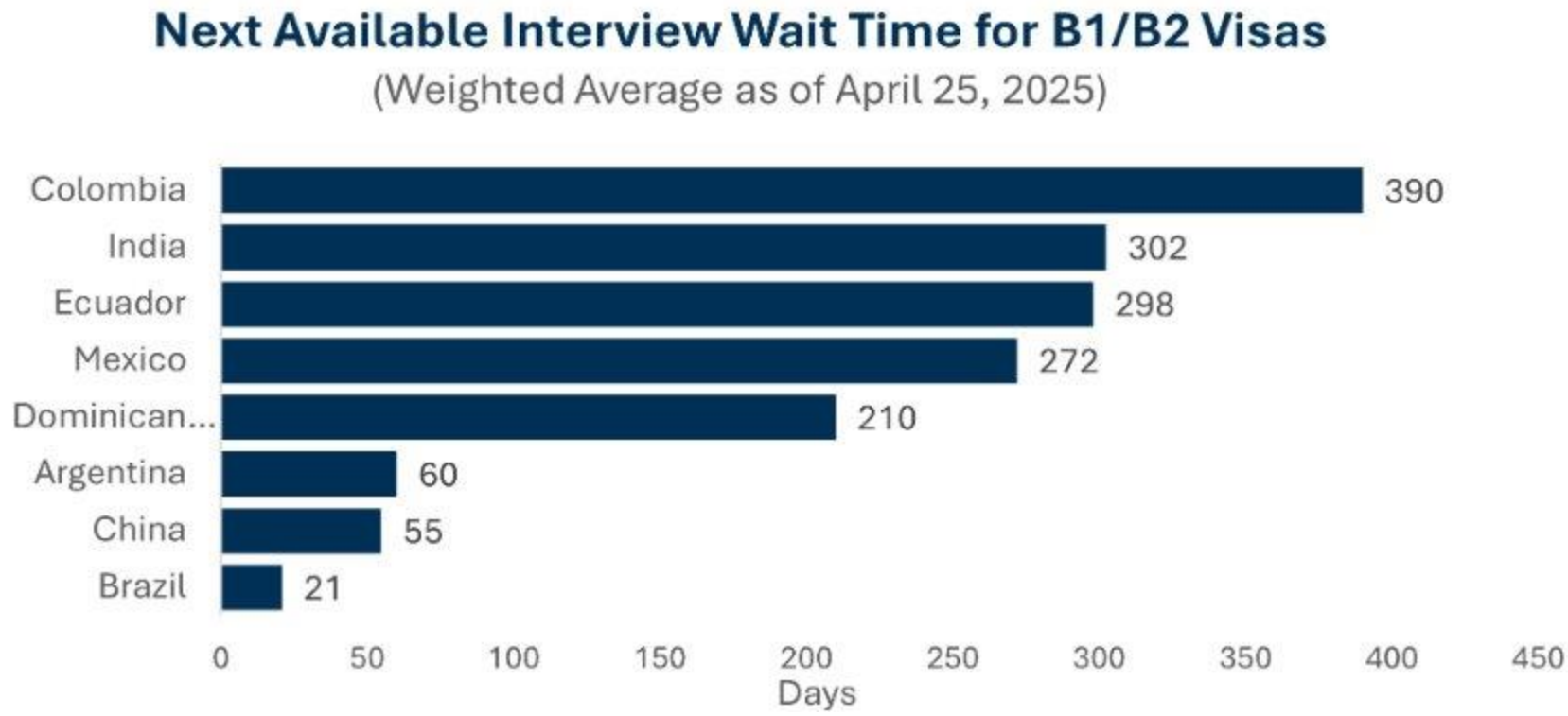
For NORAM travelers

- Cancun, Mexico
- Las Vegas, Nevada
- Orlando, Florida
- Punta Cana, Dominican Republic
- Miami, Florida
- Los Angeles, California
- Chicago, Illinois
- New York, New York
- Fort Lauderdale, Florida
- Boston, Massachusetts

Source: Expedia Group data, Q1 2025

Visas

Global Visa Estimated Wait Times



NOTE: Prior to April 2025 "average wait time" was used. Starting with April 2025 "next available appointment" data is utilized.

Source: US Department of State – Bureau of Consular Affairs

International Trends – Top 10 Points of Sale

Last 28 Days searches | Miami

Country	Share
Canada	30%
United Kingdom	13%
Brazil	12%
France	8%
Germany	8%
Mexico	7%
Italy	4%
Sweden	2%
Switzerland	2%

Source: Expedia Group Data, 2025

Travel is Changing...



CLIMBING THE RANKS

Sports tourism is on the rise

10% of global tourism spending*

\$560B 2023 worth**

\$1.3T projected worth by 2032**

UPCOMING EVENTS



UPCOMING EVENTS



Economic Impact of Taylor Swift's Eras Tour in Miami (Oct 18–20, 2024)

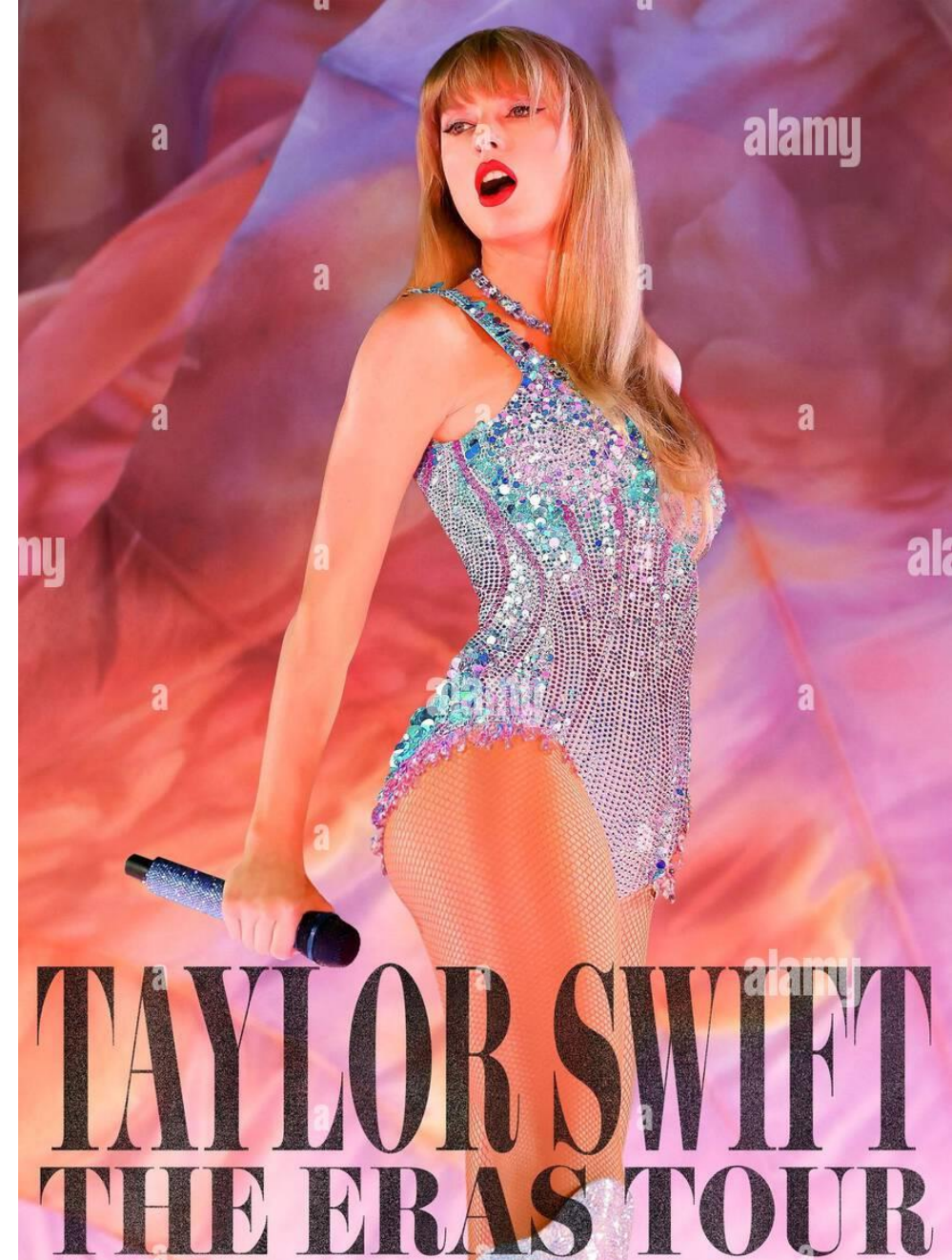
💰 Total Economic Impact: ~\$80 million across 3 days

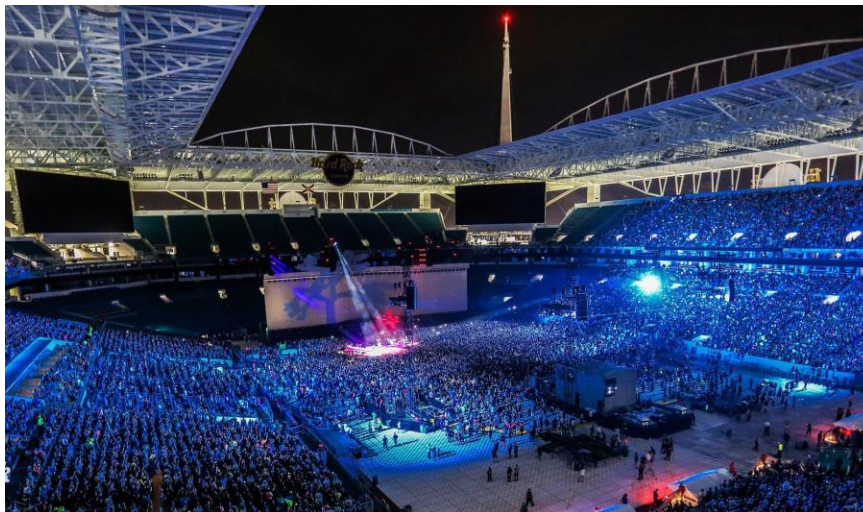
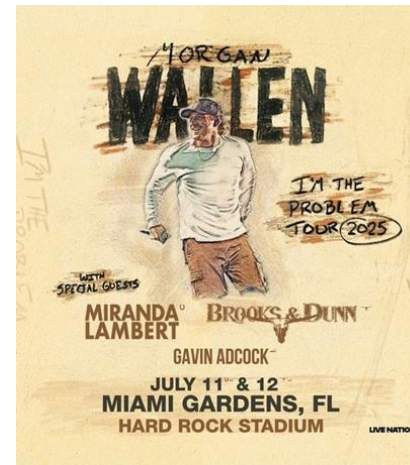
🏨 Hospitality: Hotel bookings surged ~50%, air travel demand +25%

🍴 Restaurant Revenue: +9.1% transactions, +12.8% GMV, +2.6% avg. ticket

🚗 Ride-Sharing: Lyft usage in Miami +8.2% during concert dates

🛒 Fan Spend: Avg. \$1,327 per attendee on tickets, lodging, food, and merch









Traveler Trends



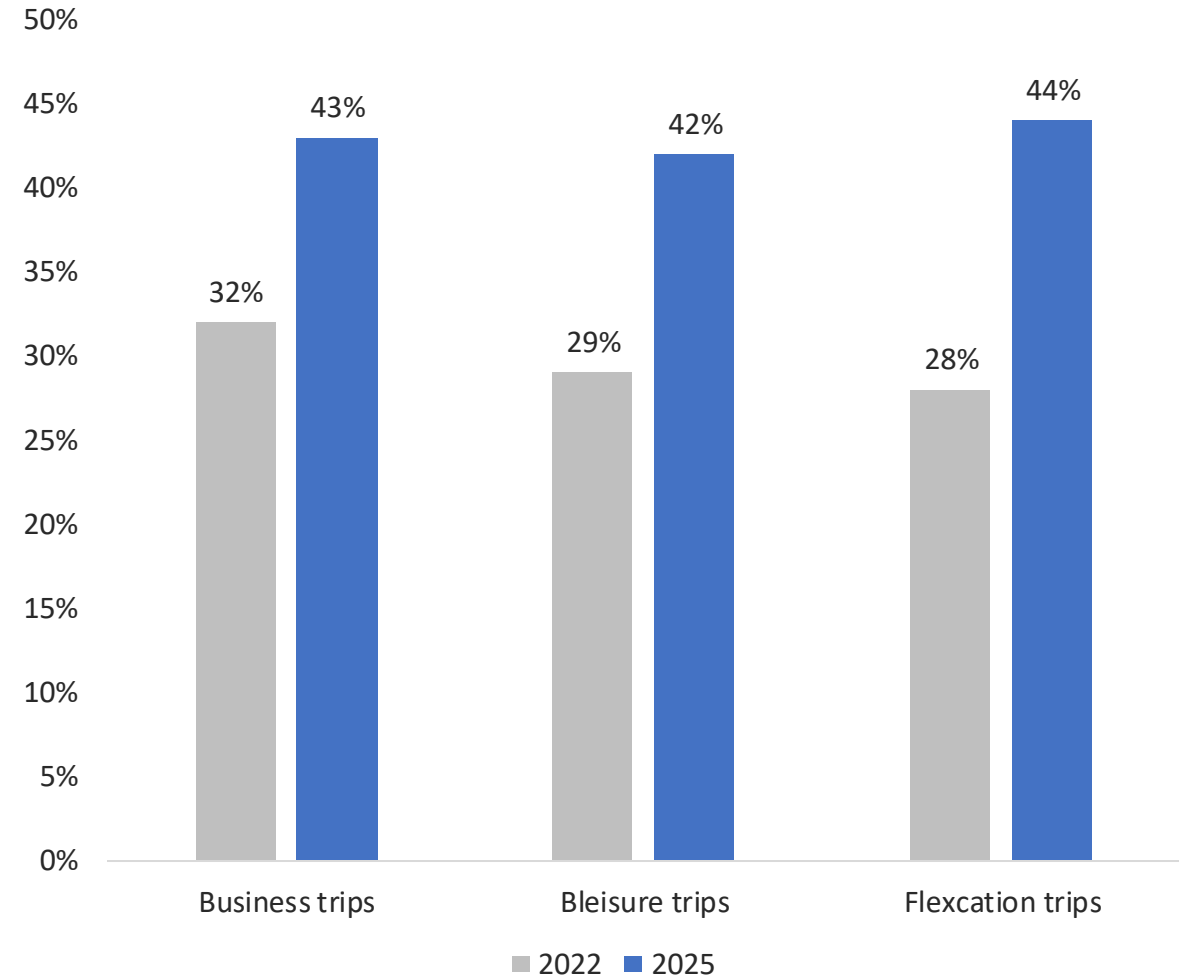
- **Localized, Authentic Experiences**
- **Bleisure & Microcations**
- **Tech-Enhanced Travel**
- **Wellness +**
- **Sustainability & Community Impact**
- **Plight of Solo Traveller continues**

TRAVEL PLANS

Planning for business, bleisure, and flexcation trips

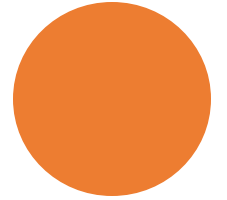
Consumers are increasingly blending work with leisure travel

While return to office is making a comeback in many industries, plans to extend work trips and work remotely while on vacation remain.



Source: Expedia Group, 2025 Traveler Value Index

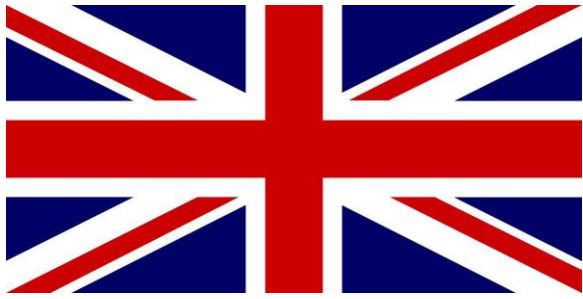
- **Multi-Gen Travel**
- **Cultural, Gastronomy**
- **Immersive Experiences**
- **Sport Tourism**
- **Luxury Travel**
- **Wellness**



POWERED BY:



Expedia Hotels.com Vrbo



- **Local Culture**
- **Culinary**
- **Sports Tourism**
- **Luxury Travel**
- **Unique Experiences**
- **Wellness**
- **Cruises**

Luxury Production Trends



+9%

SELL ADR



+4pp

ROOM TYPE
UTILIZATION



+6%

FUTURE DEMAND

The Power of Distribution and Destination Insight



70k
travel businesses

160k
travel agents

200+
countries/territories

B2B NETWORK
↑ 10%

B2B network impact

+12%

longer length of stay

+10%

higher daily rates

+10%

earlier booking window

UPCOMING EVENTS

CP (Cruise Planners)
Convention (Ft. Lauderdale) –
October 4-6, 2025 (Debra)

4–6 Oct.

5–7 Nov.

CruiseWorld (Ft. Lauderdale) –
November 5-7, 2025 (Debra)

Brand USA Travel Week UK &
Europe (London) – October
20-23, 2025 (Joe)

20–23 Oct.

1–4 Dec.

ILTM Cannes – December 1 –
4, 2025 (Joe)

Vitrina Turistica ANATO
(Colombia) – February 25-27,
2026 (Carolyn)

25–27 Feb.

17–21 May

IPW 2026 (Ft. Lauderdale) –
May 17-21, 2026

PUBLIC SERVICE ANNOUNCEMENT

Upcoming Sales Missions

Brand USA Japan Sales Mission (Tokyo & Osaka) - July 24 – 28, 2025 (Joe)

Toronto (Canada) Sales Blitz – September 10-12, 2025 (*Debra*)

Colombia Sales Mission – October 6 – 10, 2025 (Carolyn)

Mexico Sales Mission – November 10 - 14, 2025 (Carolyn)

Brand USA India Sales Mission (Bangalore) – January 18 – 23, 2026 (Joe)

Brazil Sales Mission – March 23 - 27, 2026 (Carolyn)

Argentina Sales Mission - August 24 – 28, 2026 (Carolyn)

PUBLIC SERVICE ANNOUNCEMENT

Upcoming FAM Groups

Flight Centre Travel Group (Australia) – August 15, 2025

Orinter FAM (Brazil) – September 9– 11, 2025

SIGNATURE Travel Network (U.S. Consortia) FAM – October 1– 3, 2025

BRT FAM (Brazil) FAM – October 13– 16, 2025

Blue Pineapple Travel (Atlanta, GA) Agency FAM – October 20-23, 2025



Key takeaways

01 International travel is rebounding, and Miami is well-positioned

Demand is growing fast, especially from high-value travelers. International guests stay longer, spend more, and are key to year-round performance.

02 Being early matters.

Visa delays and long booking journeys mean we must act early with the right offers and availability to capture intent before it shifts elsewhere.

03 Traveler motivations are shifting

Sports, concerts, and cultural events are driving more trips. Miami's calendar gives us a clear edge—if we're ready to meet the moment.

04 A strong B2B distribution strategy is essential

Expedia Group's network connects partners to 70k+ travel businesses and 160k+ agents worldwide. When paired with GMCVB's destination promotion, it ensures Miami is visible, relevant, and bookable—at scale.



THANK YOU FOR JOINING US!

POWERED BY:

