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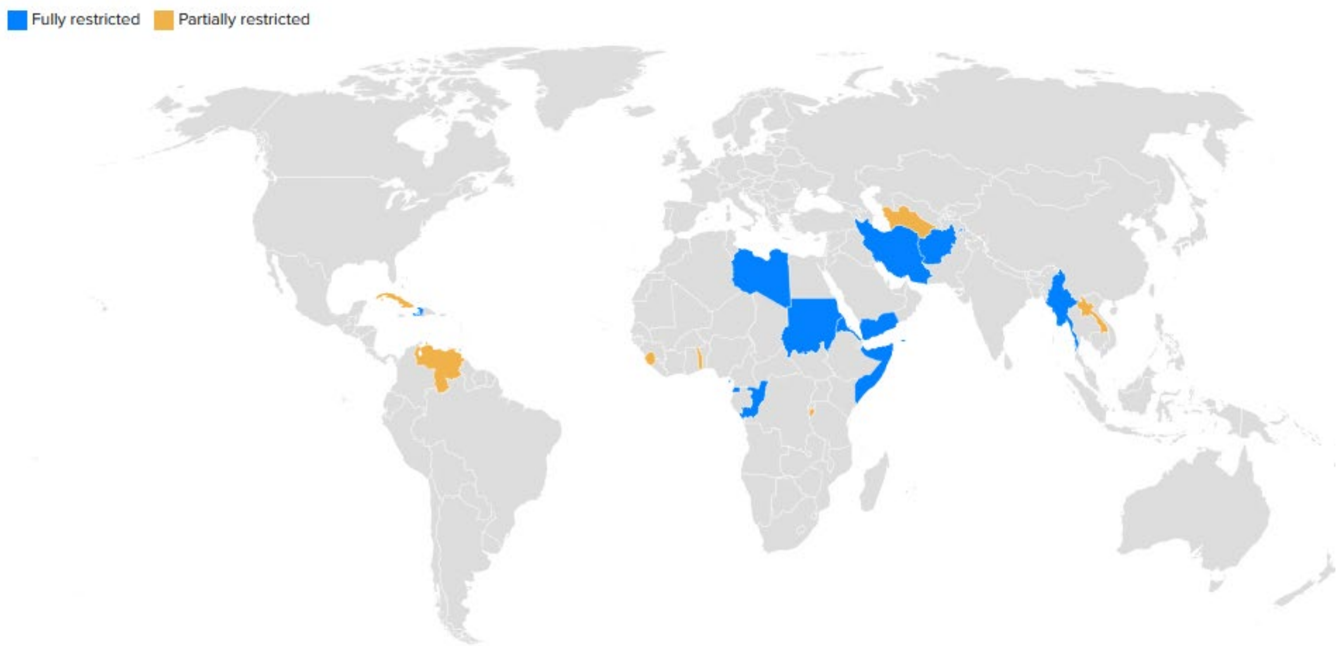
Miami-Dade County Industry Updates

June 2025

In Summary

- Recent travel restrictions from select international markets should have little to no effect on tourism, to Miami or most other destinations in the US except for Venezuela.
- Barriers to inbound international tourism to the US are political, perceptual as well as financial. International visitors to Miami are generally not visiting or spending as much as they did a year ago.
- Airlines have been adjusting their schedules to meet an anticipated decline this summer, mainly South America (Colombia) and Canada. European markets show mixed signals in visiting Miami, with strength from Germany and Spain. That said, scheduled European seat capacity for the summer is still above a year ago.
- Hotel performance has been on par or better than last year for the first 5 months of 2025. However, on a 28-day basis, performance has been a little weaker than the same period last year.
- Reserved hotel occupancy has generally been improving from that of the past few months, although recently there has been some slight softness showing for July. August is looking very good.

New International Travel Restrictions, Should Have Little Impact On Miami



Full	Partial
Afghanistan	Burundi
Myanmar	Cuba
Chad	Laos
The Republic of the Congo	Sierra Leone
Equatorial Guinea	Togo
Eritrea	Turkmenistan
Haiti	Venezuela
Iran	
Libya	
Somalia	
Sudan	

Exceptions:
U.S. permanent residents and the spouses and children of U.S. citizens who have clear and convincing evidence of identity and family relationship
Afghans who assisted American forces and have special visas
Diplomats
Athletes coming to the U.S. for the World Cup, the Olympics and other major sporting events
Dual nationals with a passport from a country not listed in the president's decree
Adoptions
Ethnic and religious minorities facing persecution in Iran with immigrant visas
Exceptions made by the attorney general or secretary of state for travel deemed as advancing United States national interest.

Sources: CBS, Whitehouse.gov

Access articles **here** and **here**

High Travel Costs Overshadow Political Concerns For Overseas Visitors, Says U.S. Travel's CEO

"As I walk on the floor here and talk to people, the biggest concern I hear from buyers is not about administration policy. The number one concern I hear is the cost of travel," Freeman said on June 16 at U.S. Travel's annual IPW conference this week. "***I was talking with someone earlier today who just said they went and got a latte and it was $8. That's just a really expensive latte. And it's fair to say that could be a shock for many travelers and it's something we've got to pay attention to.”***

Freeman also said that while there is some weakness in inbound travel, the numbers are "fine," except for Canada. However, "fine" is a missed opportunity. **The National Travel & Tourism Office's most recent overseas visitation numbers showed an 8% year-over-year increase in April, followed by a 2.8% dip in May. Year-to-date international visitation to the U.S. is down 0.8%, mainly due to a weak March, when travel fell 11.6%. The NTTO's numbers do not include Canada, the top source market for U.S. visitors, or land crossings from Mexico.**

Freeman said he's disappointed with mainstream media coverage of international travel to the U.S. ***"That's not to say there aren't areas I think we can do better,”*** he added. ***"I think we have to acknowledge that a perception has formed that the U.S. is not as welcoming as it was. That at a customs checkpoint you might get detained or your device might be searched. There's more we need to do to assure the world that we do want them to come, that they are a priority for us. And that's a combination of the White House, the Department of Homeland Security, Brand USA, all working together to address this.”***

US Leisure Travelers Expect To Travel More This Summer

- **Leisure Entertainment Consumers in the U.S. are mostly comfortable with their current and future financial situation**
- They **plan to travel more**, although **shorter duration getaways and vacations** will replace some longer trips, and more will be **driving versus flying** to destinations
- **Most expect their financial situation to stay the same**, except for those who are struggling today (which are primarily in lower income groups or unemployed)
- **Most travelers expect to spend as much or more on vacations and getaway travel** than they did a year ago
- There is a **strong interest in doing local activities**; beaches, movies and parks top the list
- While **interest in attractions is high**, most consumers are **not expecting to spend more**
- Most **plan to spend the same or less on dining out**
- **Shopping** for non-essential items **will likely decline**
- **Demand for more expensive experiences** like theme parks, water parks, entertainment shows and sporting events **may stay the same or decline**
- **Free or low-priced activities** should expect more visitors
- **Lack of money surpasses a lack of time** as a detriment to doing more

Source: Integrated Insight 2025 Leisure Experiences Consumer Survey, fielded in May 2025 with a sample of 2,570 consumers

2024 Miami-Dade County Visitation & Spending

Visitors (1,000s)							
Overnight Visitors	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**	**VS 2023**
Domestic	6,897	4,328	8,719	10,369	10,031	10,281	2%
International	5,337	1,842	3,747	4,743	4,905	5,133	5%
Florida Resident	4,089	1,708	3,450	4,057	4,362	4,694	8%
Total Overnight	16,323	7,877	15,915	19,169	19,298	20,107	4%

Day Visitors	2019	2020	2021	2022	2023	2024	VS 2023
Domestic	2,213	1,421	3,355	2,399	2,625	2,691	3%
International	1,568	614	1,442	1,100	1,301	1,308	1%
Florida Resident	4,064	1,682	3,508	3,832	3,949	4,124	4%
Total Day Visitors	7,845	3,717	8,304	7,332	7,875	8,123	3%

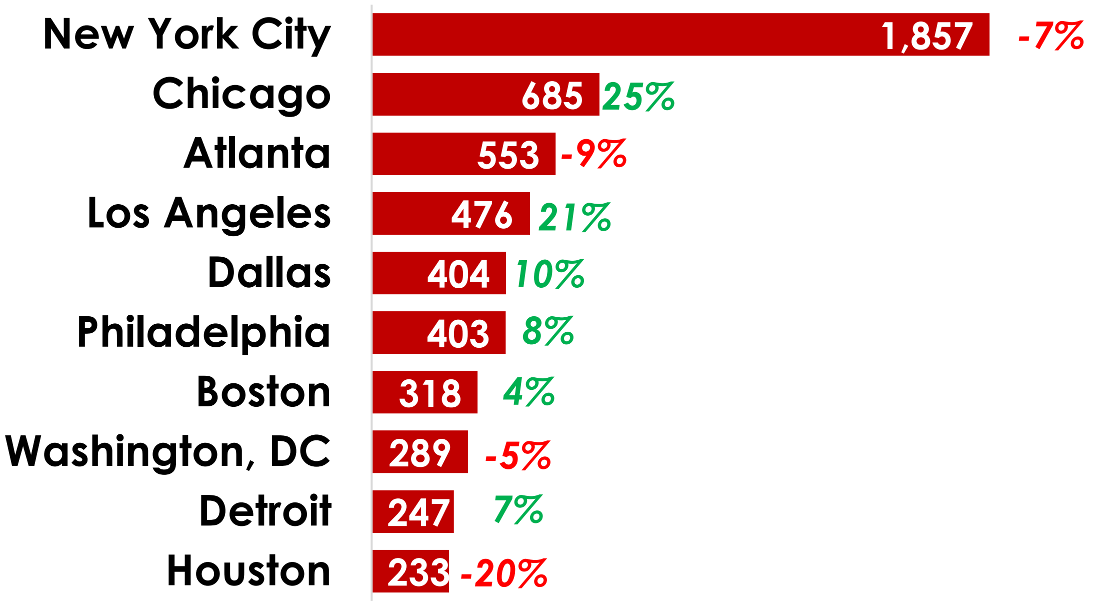
Total Visitors	2019	2020	2021	2022	2023	2024	VS 2023
Total Domestic	9,110	5,749	12,074	12,768	12,656	12,971	2%
Total International	6,905	2,456	5,189	5,843	6,206	6,441	4%
Total Florida Resident	8,153	3,390	6,958	7,889	8,311	8,818	6%
Total Visitors	24,168	11,594	24,220	26,501	27,173	28,230	4%

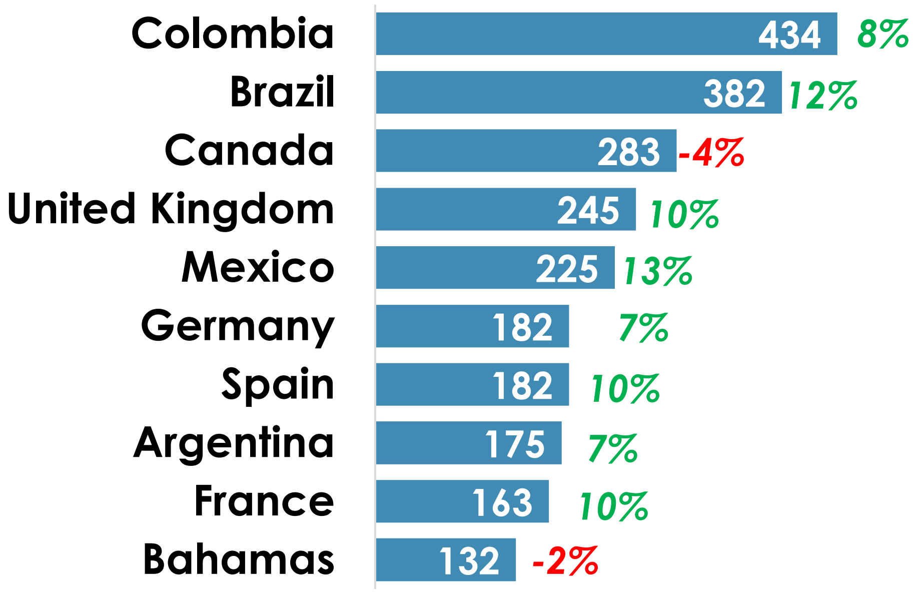
Total Visitor Spend ($Billion)							
Segment	**2019**	**2020**	**2021**	**2022**	**2023**	**2024**	**VS 2023**
Domestic	$6.9	$4.2	$9.8	$11.4	$10.7	$11.0	3%
International	$8.4	$2.5	$6.5	$6.1	$6.6	$7.0	5%
FL Resident	$2.6	$1.3	$3.0	$3.4	$3.8	$4.0	5%
Total	$17.9	$7.9	$19.2	$20.8	$21.1	$22.0	4%

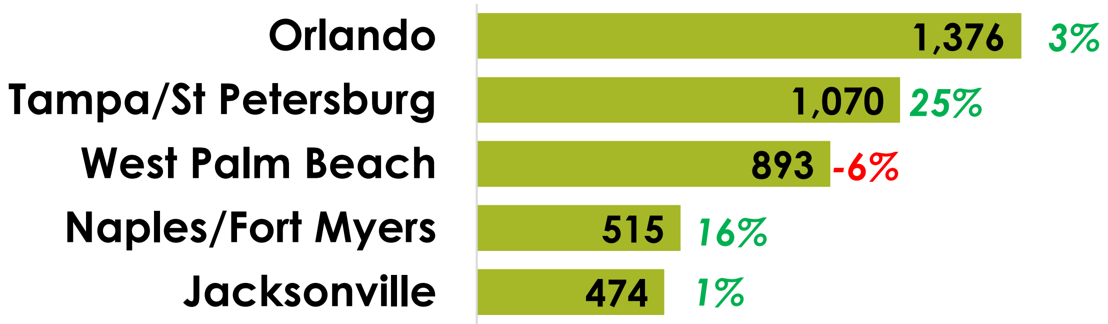
Source: GMCVB

Access full report here

2024 Miami-Dade County Top Overnight Visitor Market Origin







Source: GMCVB

Access full report here

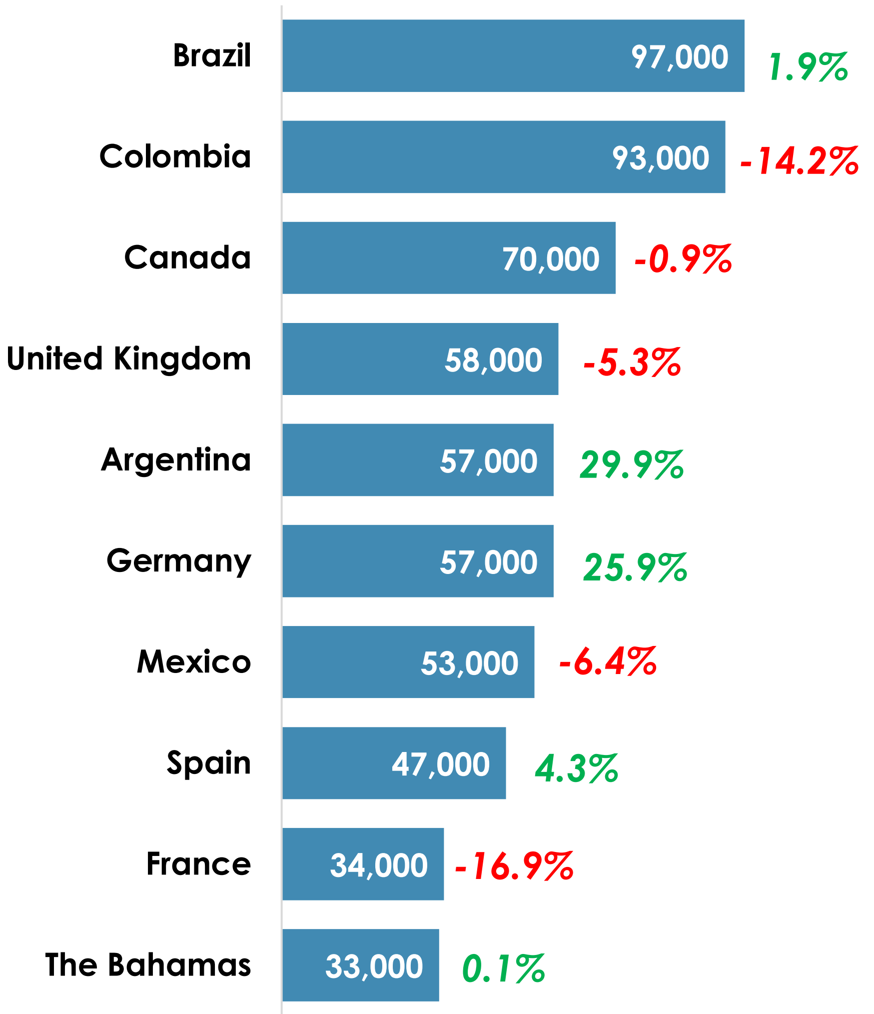
Q1 2025 Miami-Dade County Total Visitation

Q1 Overnight Visitors (1,000s)		
Segment	2025	% YOY
Domestic	2,924	0.9%
International	1,336	-4.2%
Florida Resident	819	2.0%
Total Overnight	5,079	-0.3%

Q1 Day Visitors (1,000s)		
Segment	2025	% YOY
Domestic	730	-5.8%
International	334	-1.5%
Florida Resident	802	6.1%
Total Day Visitors	1,866	-0.2%

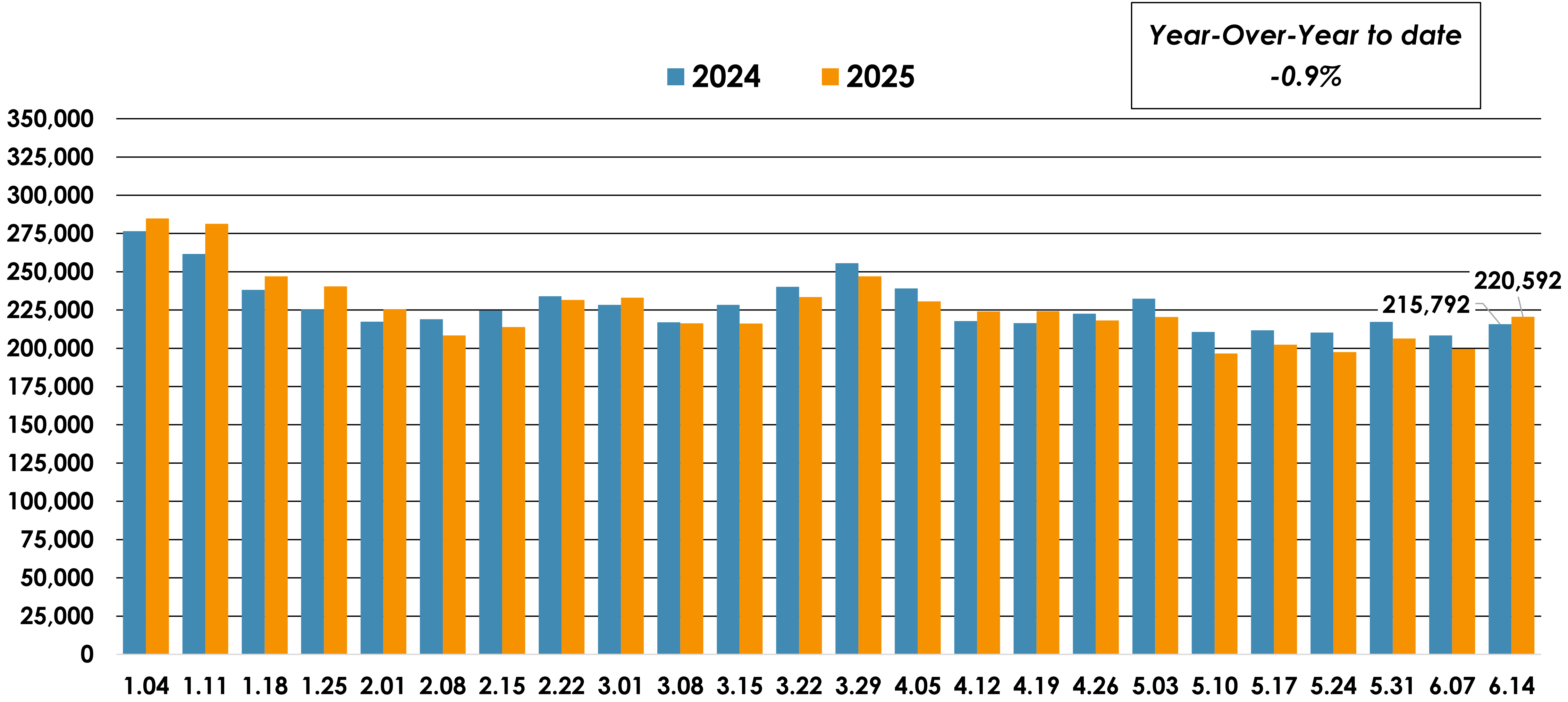
Q1 Total Visitors (1,000s)		
Segment	2025	% YOY
Total Domestic	3,654	-0.6%
Total International	1,670	-3.7%
Total Florida Resident	1,621	4.0%
Total Visitors	6,945	-0.3%

Q1 International Overnight Visitors



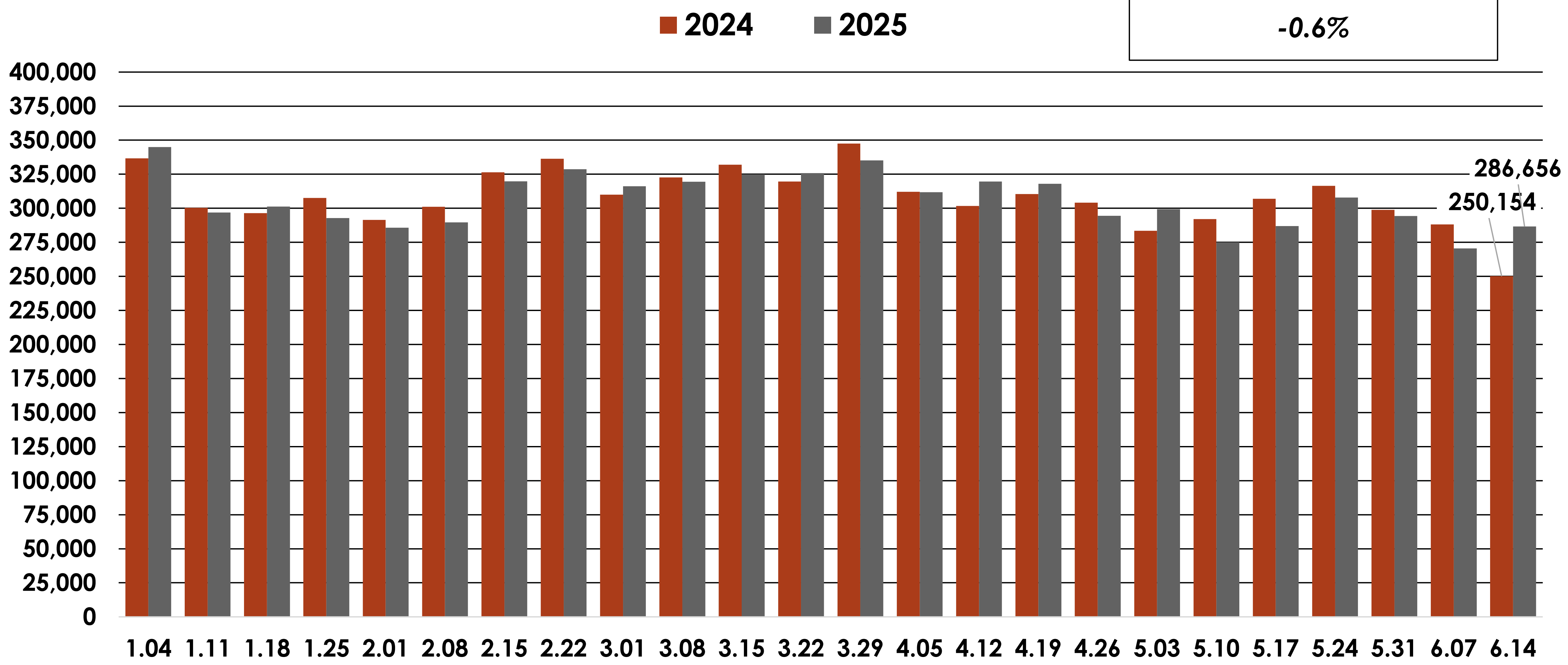
Source: GMCVB

Miami International Weekly Arrivals - International



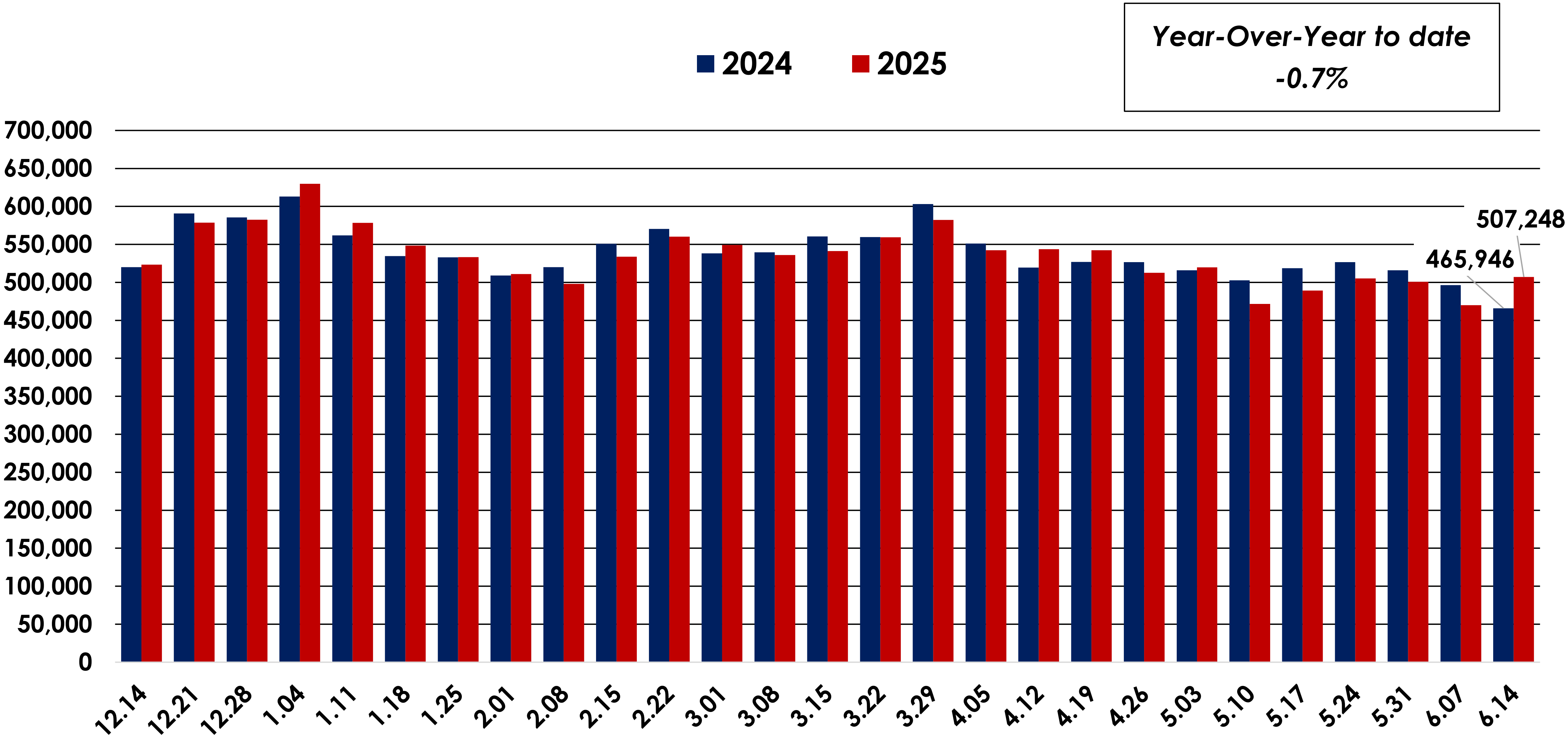
Miami International Weekly Arrivals - Domestic

Year-Over-Year to date
-0.6%



Source: MIA

Miami International Weekly Arrivals
Domestic + International



Source: MIA

MIA Nonstop International Seat Capacity – Q3 2025

Continent	Q3 2024	Q3 2025	% YOY
Caribbean	1,048,470	1,053,912	0.5%
South America	993,648	917,336	-7.7%
Europe	593,534	620,623	4.6%
Central America	466,474	485,890	4.2%
North America	362,601	337,315	-7.0%
Middle East	91,113	87,399	-4.1%
Africa	13,152	10,732	-18.4%
Grand Total	3,568,992	3,513,207	-1.6%

Country	Q3 2024	Q3 2025	% YOY
Colombia	386,634	340,022	-12.1%
Mexico	265,066	264,244	-0.3%
Dominican Republic	226,723	242,668	7.0%
Brazil	178,870	179,216	0.2%
United Kingdom	171,038	175,668	2.7%
Spain	146,546	149,134	1.8%
Panama	131,480	126,584	-3.7%
Bahamas	114,272	125,262	9.6%
Peru	123,364	124,861	1.2%
Argentina	92,012	97,508	6.0%
Costa Rica	69,832	94,344	35.1%
Honduras	77,862	78,532	0.9%
Chile	67,676	73,745	9.0%
Canada	97,535	73,071	-25.1%
Jamaica	64,664	70,264	8.7%
France	61,229	62,888	2.7%
Nicaragua	76,648	61,184	-20.2%
Guatemala	47,664	57,898	21.5%
Ecuador	78,444	57,232	-27.0%
Turkey	54,008	56,708	5.0%
Germany	45,578	49,298	8.2%

Source: Innovata Schedules via Diio by Cirium, as of 6/1/2025

Miami-Dade County Visitor VISA Card Count & Spend, Q1 2025
% Year-Over-Year, Sorted On Card Count

Country	Card count	Spend
Canada	-7.4%	-11.0%
Brazil	9.8%	-4.7%
Argentina	81.0%	194.0%
United Kingdom	6.0%	7.9%
France	-6.1%	-8.5%
Mexico	-13.0%	-12.3%
Peru	5.3%	11.3%
Germany	-3.4%	-8.6%
Spain	-0.5%	-0.7%
Colombia	-10.5%	-4.8%
Chile	-13.9%	-18.8%
Ecuador	-15.7%	-16.8%
Panama	9.3%	8.2%
Dominican Republic	-12.0%	-18.3%
Australia	16.8%	-10.2%
Bahamas	3.2%	-0.6%
Italy	-1.9%	-10.0%
Guatemala	-10.3%	-3.5%
Costa Rica	-0.6%	6.0%
Poland	19.8%	13.2%
Total International	0.1%	-1.7%

CBSA*	Card count	Spend
New York	-3.3%	5.7%
Washington, DC	2.6%	1.6%
Los Angeles	-0.6%	-0.9%
Atlanta	-5.7%	-5.3%
Chicago	-4.8%	0.5%
Boston	-2.2%	-0.9%
Detroit	7.7%	11.5%
Philadelphia	-7.2%	-4.6%
Houston	-3.9%	1.7%
Dallas	-1.7%	-1.5%
Baltimore	-13.2%	-10.4%
Charlotte	9.1%	17.7%
San Francisco	-9.0%	1.4%
Phoenix	2.0%	-2.2%
Denver	2.3%	2.3%
Minneapolis	-3.2%	-3.7%
Las Vegas	-2.4%	1.2%
Seattle	-4.9%	10.3%
Austin	2.1%	3.6%
Nashville	-6.0%	-1.5%
Total Domestic	-2.7%	1.7%

Source: VISA *excludes Florida

Miami-Dade Regional Hotel Performance: Jan - May 2025

Area	Occupancy	% YOY	ADR	% YOY	RevPAR	% YOY
Miami-Dade	79.9%	0.4%	$263.94	2.4%	$210.99	2.9%
Airport/Civic Center	84.6%	-1.5%	$156.73	-0.1%	$132.54	-1.6%
Aventura/Sunny Isles	79.2%	3.5%	$304.80	2.8%	$241.30	6.4%
Central Dade	82.0%	-0.9%	$156.64	3.4%	$128.46	2.5%
Coconut Grove/Key Biscayne	78.4%	0.7%	$369.17	1.3%	$289.36	1.9%
Coral Gables	80.7%	1.8%	$249.68	4.3%	$201.59	6.2%
Doral	83.1%	0.2%	$178.67	1.2%	$148.42	1.3%
Downtown Miami/Brickell	79.3%	2.5%	$288.16	3.2%	$228.44	5.8%
Miami Beach	79.0%	0.2%	$340.34	2.0%	$268.77	2.2%
North Dade	76.9%	-0.3%	$142.10	0.0%	$109.27	-0.2%
South Dade	77.1%	-1.6%	$122.28	1.8%	$94.32	0.2%
Surfside/Bal Harbour	72.3%	8.5%	$780.84	-0.4%	$564.18	8.1%

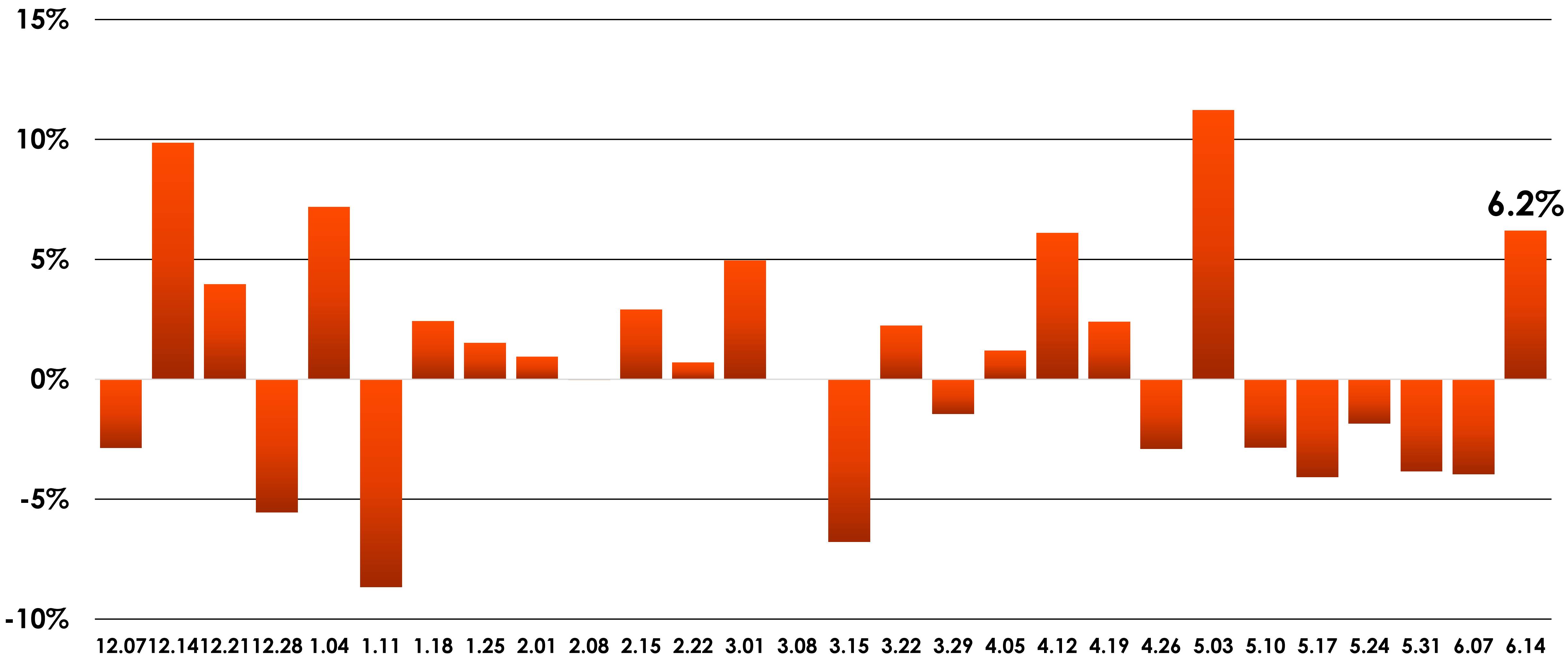
Source: STR

Miami-Dade Regional Hotel Performance: Past 28 Days Ending 6/14

Area	Occupancy	% YOY	ADR	% YOY	RevPAR	% YOY
Miami-Dade	69.1%	-1.5%	$184.19	0.1%	$127.25	-1.4%
Airport/Civic Center	75.1%	-6.9%	$119.83	-2.3%	$90.02	-9.1%
Aventura/Sunny Isles	68.5%	5.5%	$223.72	0.2%	$153.27	5.8%
Central Dade	72.1%	-3.7%	$116.07	-2.3%	$83.73	-5.8%
Coconut Grove/Key Biscayne	65.2%	-2.3%	$203.04	2.7%	$132.43	0.4%
Coral Gables	66.5%	0.7%	$176.04	2.6%	$117.07	3.3%
Doral	71.0%	-4.0%	$129.64	-1.9%	$92.08	-5.9%
Downtown Miami/Brickell	68.9%	6.1%	$202.62	2.0%	$139.60	8.2%
Miami Beach	69.0%	-1.8%	$231.93	-1.0%	$160.09	-2.8%
North Dade	65.6%	-2.4%	$105.90	-1.6%	$69.43	-3.9%
South Dade	60.2%	-10.0%	$87.11	-5.8%	$52.46	-15.2%
Surfside/Bal Harbour	55.8%	1.6%	$531.67	8.0%	$296.71	9.8%

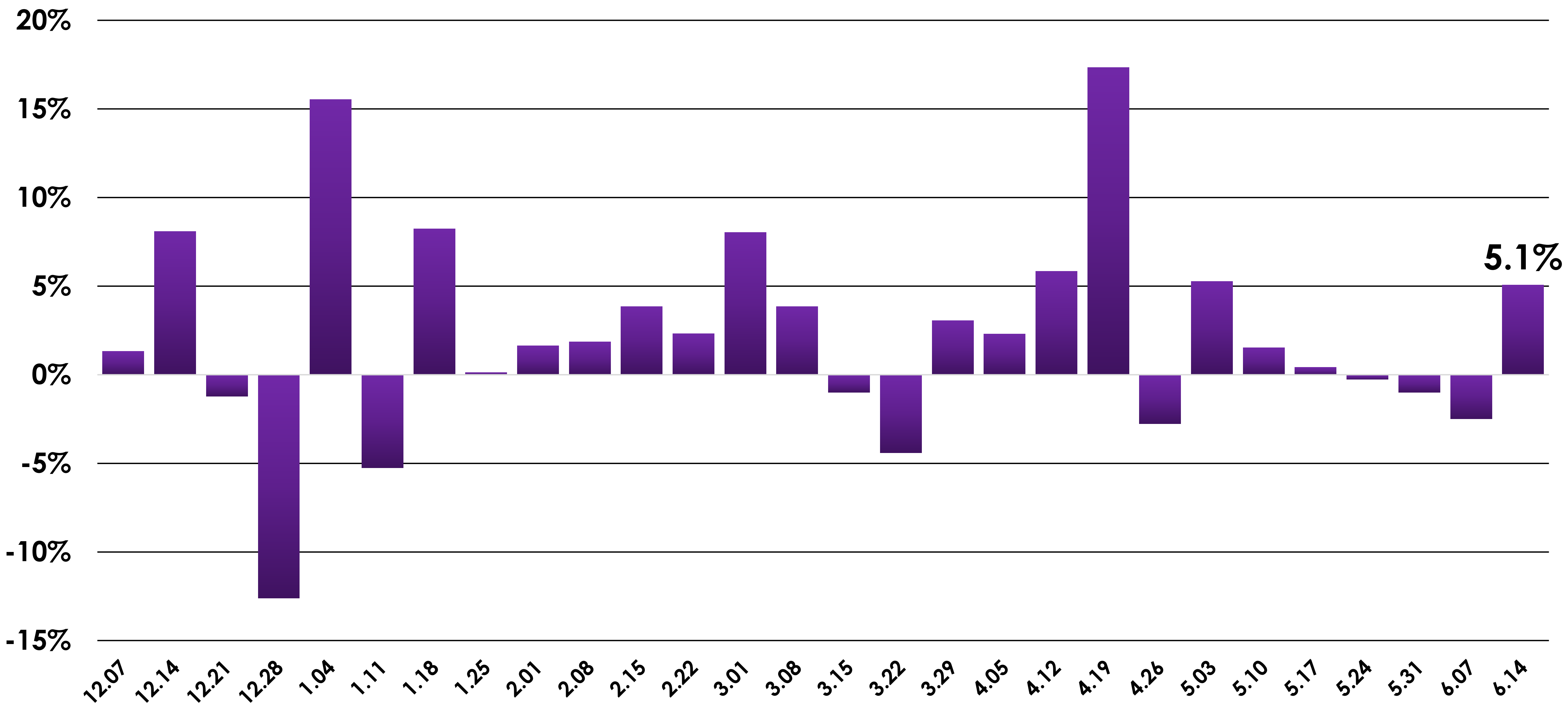
Source: STR

Miami-Dade County - % Change Year-Over-Year Hotel Room Demand Past 26 Weeks



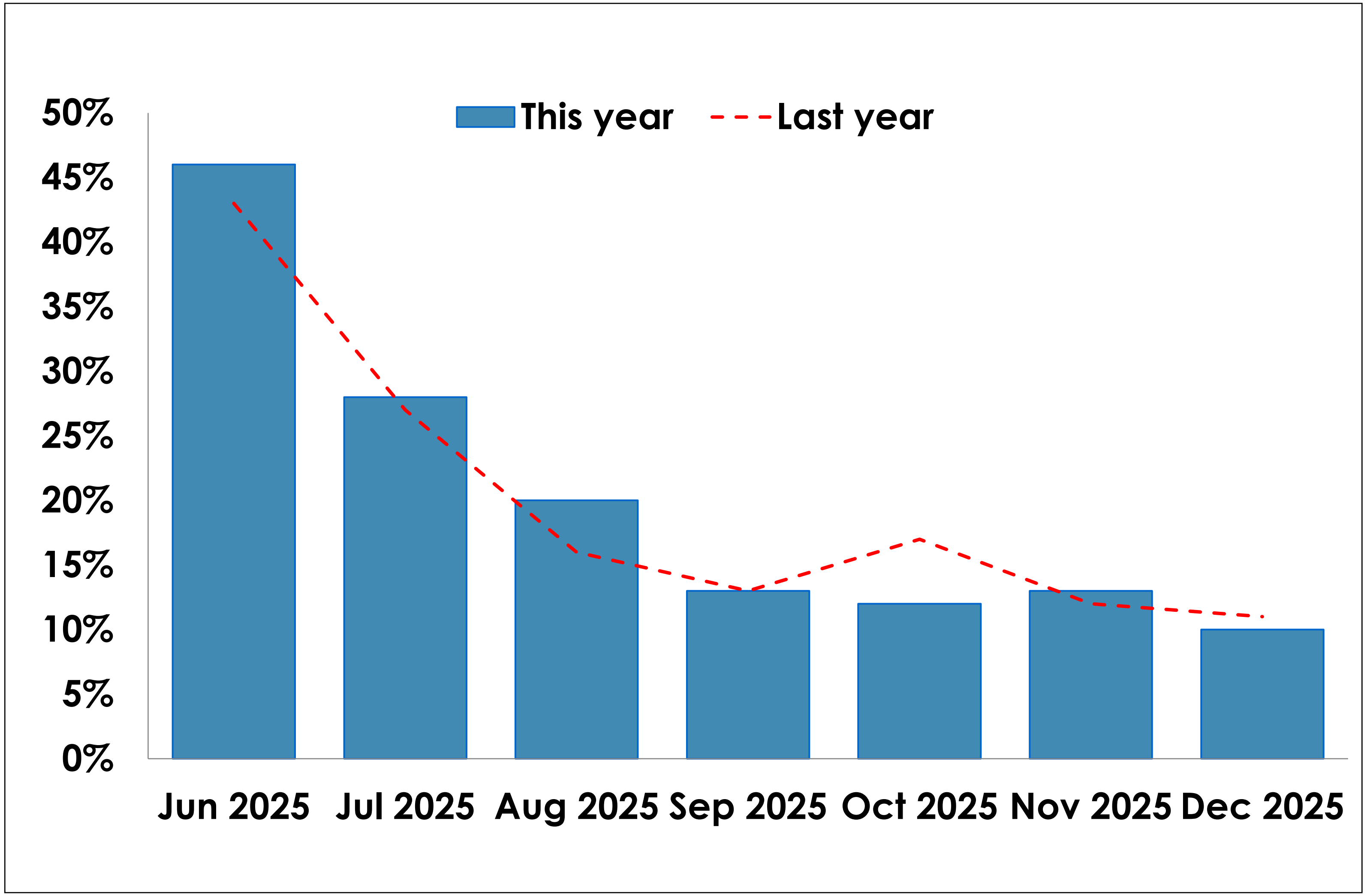
Source: STR

Miami-Dade County - % Change Year-Over-Year Average Daily Room Rate Past 26 Weeks



Source: STR

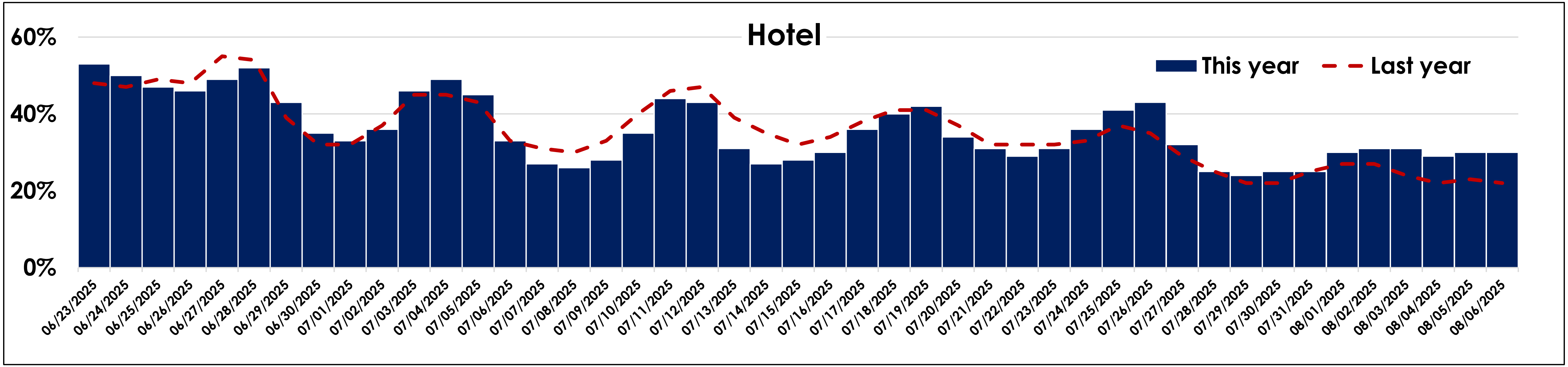
Miami-Dade County Hotel Reserved Occupancy – By Month

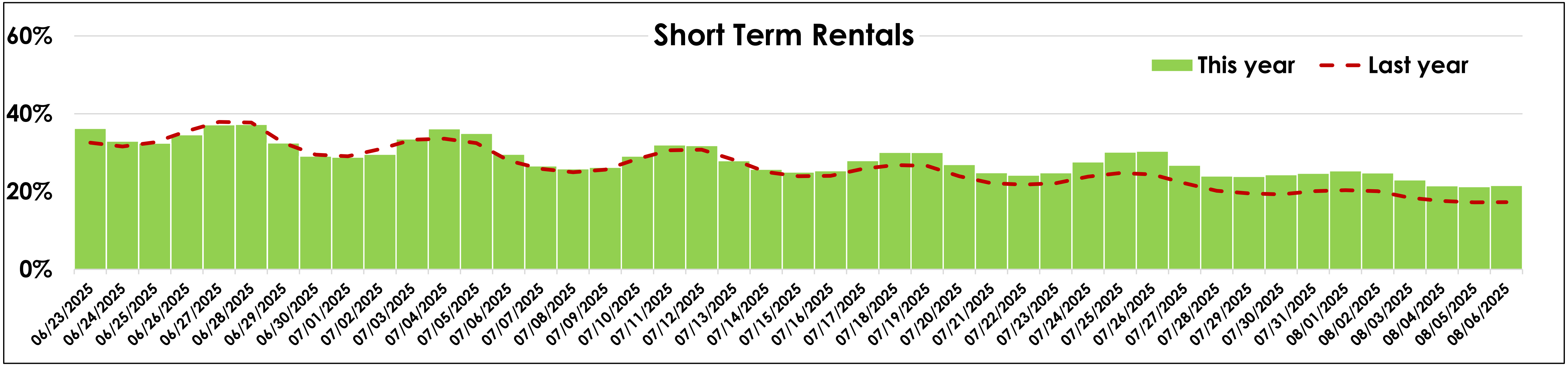


Month	This year	Last year	As of 5/7	As of 6/2
Jun 2025	46%	43%	+1	+3
Jul 2025	28%	27%	-1	+1
Aug 2025	20%	16%	+2	+4
Sep 2025	13%	13%	-2	0
Oct 2025	12%	17%	-5	-5
Nov 2025	13%	12%	-1	+1
Dec 2025	10%	11%	-2	-1

Source: STR, as of June 2 2025

Miami-Dade County Paid Lodging Reserved Occupancy Next 45 Days





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