

Travel Industry Sales Breakout Session



Andrew Wobensmith
Director – Research & Business
Intelligence

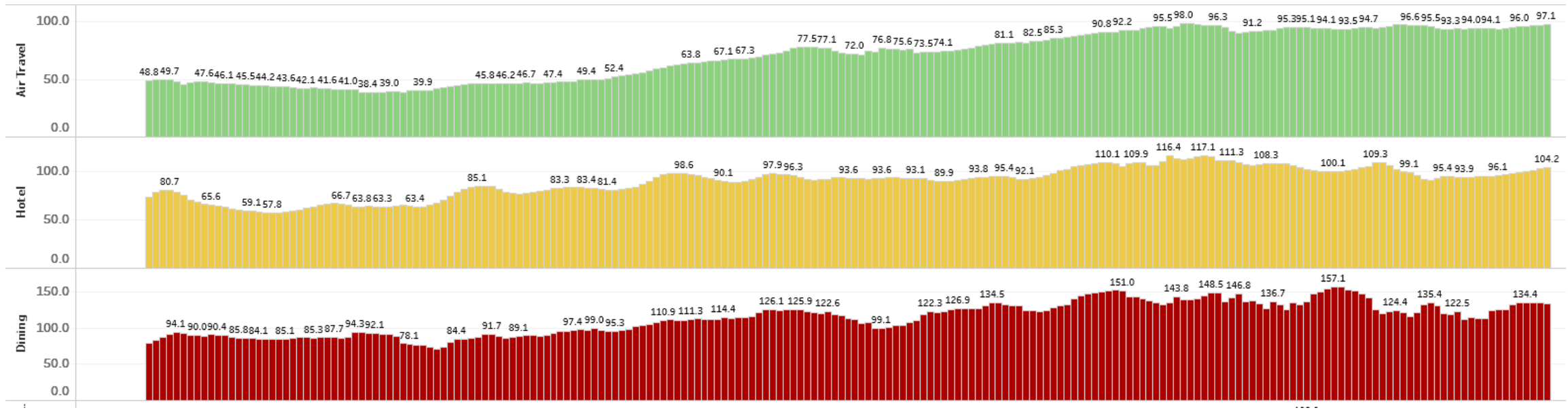


Shawn Rush
Senior Marketing Director for South
Florida



January 1 – July 24, 2021

	VS. 2019	
	Saturday, July 25, 2020	Saturday, July 24, 2021
Air Travel – MIA passengers	-78.6%	-2.9%
Hotel – rooms sold	-67.6%	+4.2%
Dining – in-house seated dining	-77.7%	+33.6%



Source: MIA, STR, Open Table

Q1 2019 – 2020 – 2021 Miami-Dade County Visitor Volume

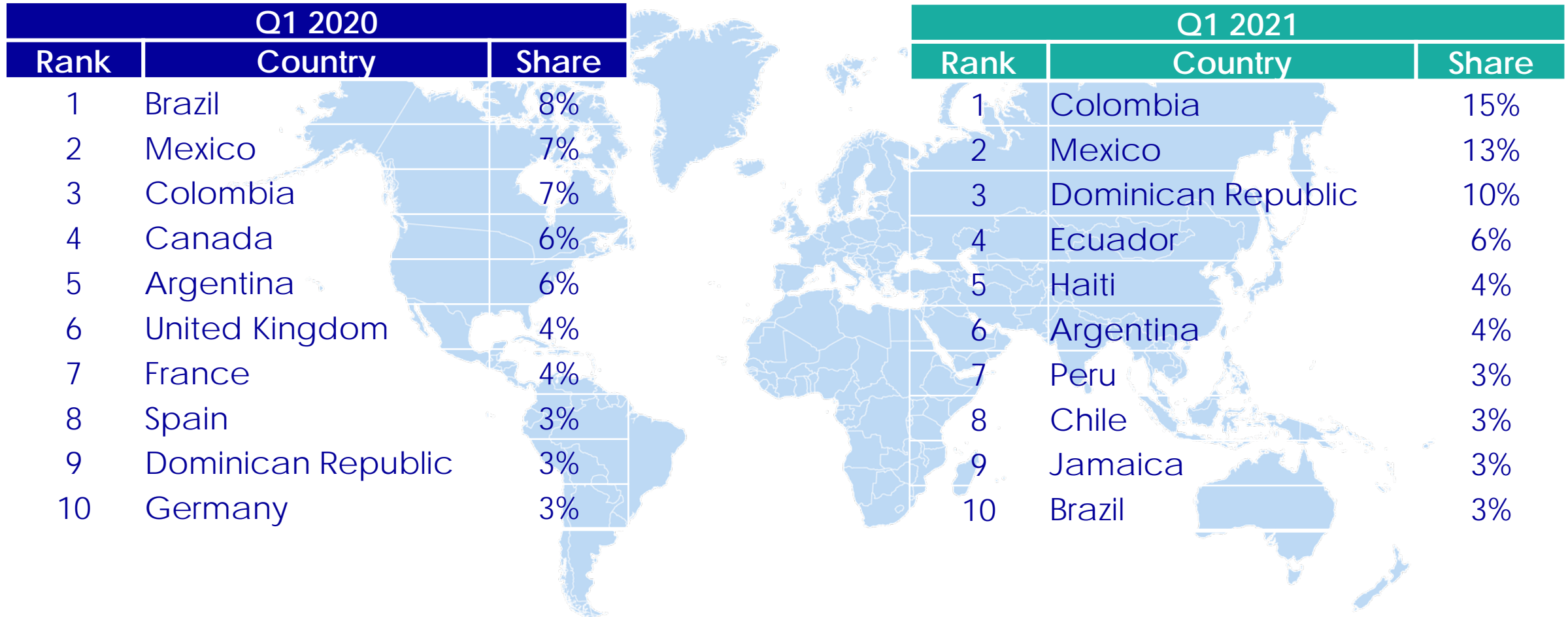


Year	January	February	March	Q1
2021	1,676,700	1,458,300	1,660,600	4,795,600
2020	2,049,500	2,040,300	1,021,100	5,110,900
2019	2,014,700	2,031,100	2,169,200	6,215,000
<i>'21 vs '19</i>	-16.8%	-28.2%	-23.4%	-22.8%

	January	February	March	2021 vs 2019
Domestic	-7.9%	-1.0%	6.2%	-0.5%
International	-74.5%	-70.5%	-66.5%	-70.5%
FL Resident	+40.7%	-20.0%	-19.3%	-0.2%

Source: 2021 GMCVB Visitor Profile

Q1 2020/2021 Top International Visitor Markets



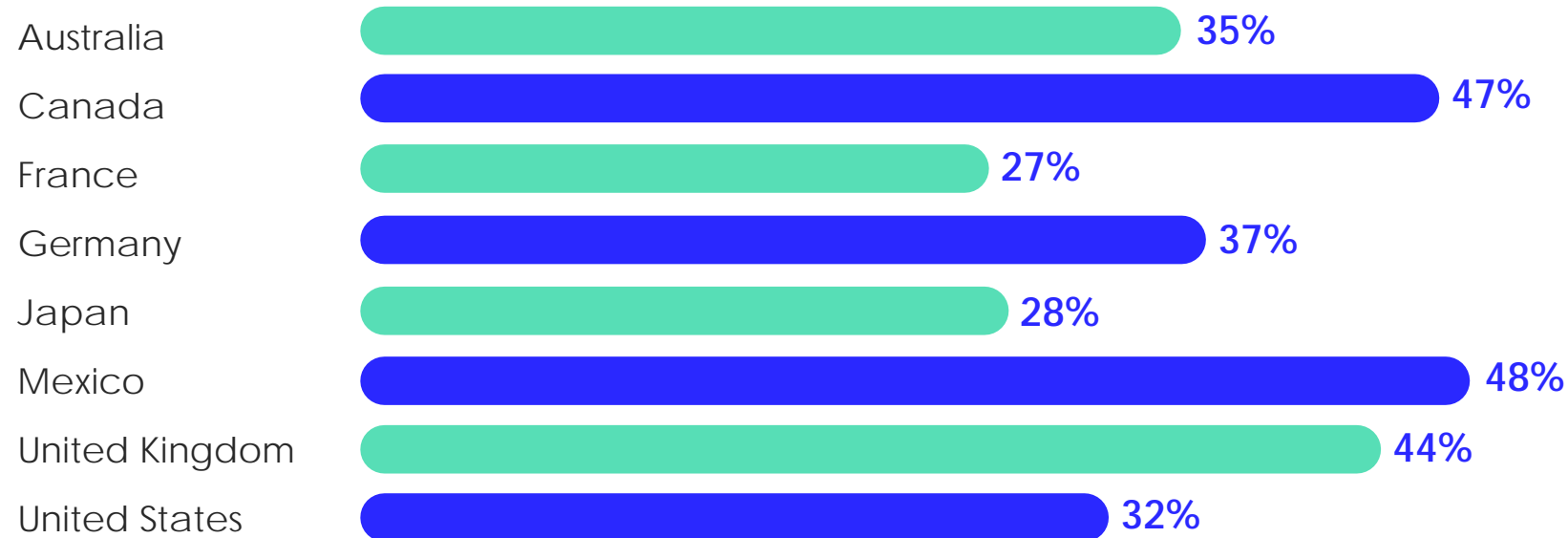
Source: ARC

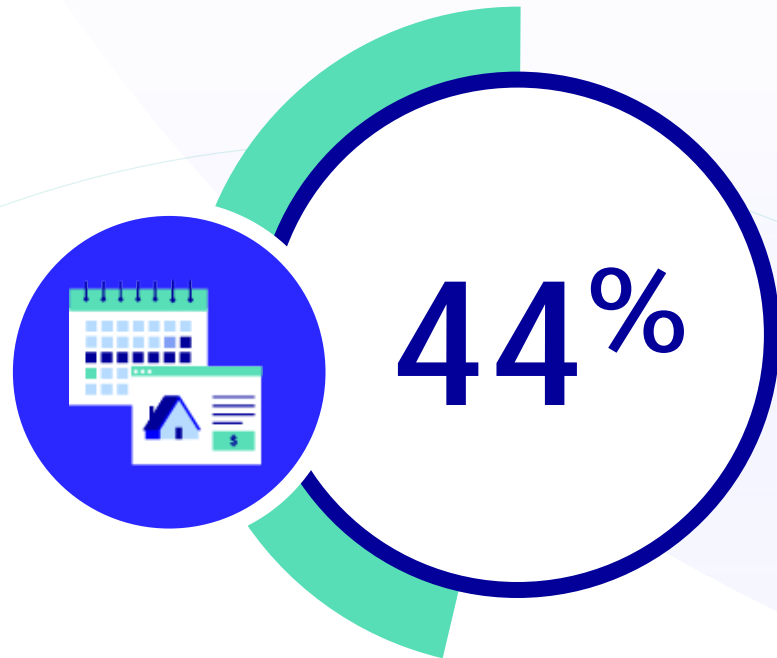
Travel was put on hold in 2020



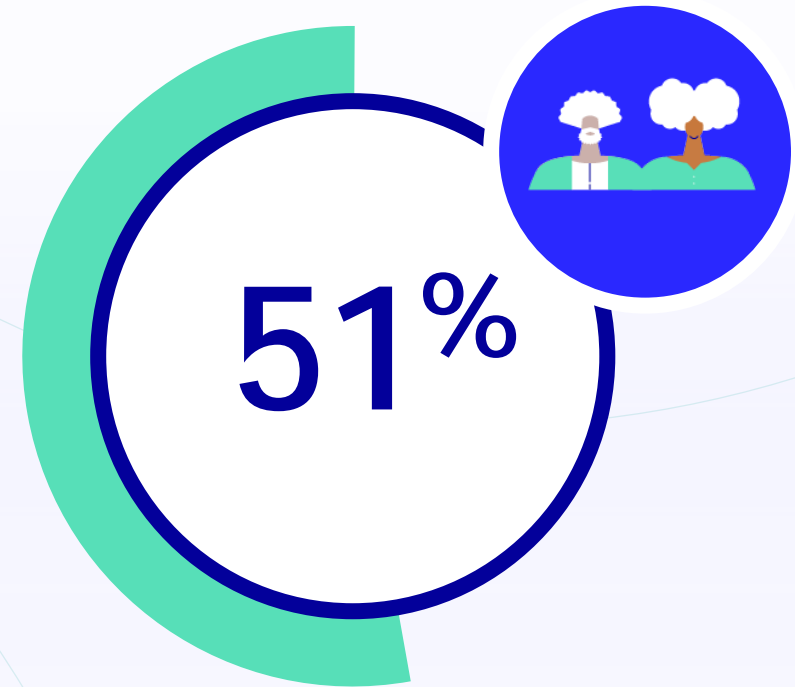
How did the COVID-19 outbreak change travel plans in 2020?

Percentage of respondents who canceled or postponed all travel plans in 2020



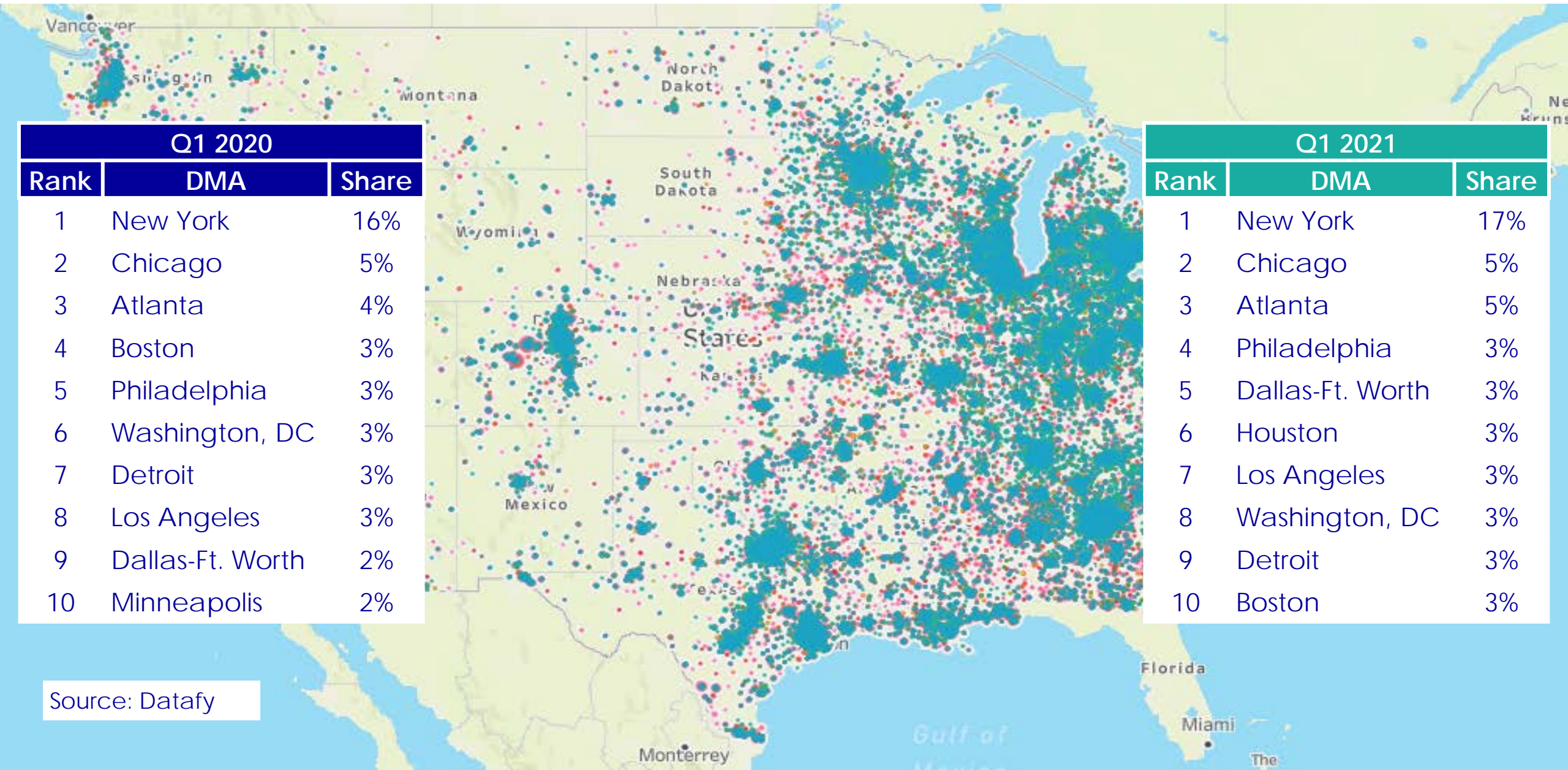


of travelers said the last vacation they took was more than a year ago.



of travelers ages 40 and above indicated it had been at least a year.

Q1 2020/2021 Top Domestic Visitor Markets



Q1 2020		
Rank	DMA	Share
1	New York	16%
2	Chicago	5%
3	Atlanta	4%
4	Boston	3%
5	Philadelphia	3%
6	Washington, DC	3%
7	Detroit	3%
8	Los Angeles	3%
9	Dallas-Ft. Worth	2%
10	Minneapolis	2%

Q1 2021		
Rank	DMA	Share
1	New York	17%
2	Chicago	5%
3	Atlanta	5%
4	Philadelphia	3%
5	Dallas-Ft. Worth	3%
6	Houston	3%
7	Los Angeles	3%
8	Washington, DC	3%
9	Detroit	3%
10	Boston	3%

Source: Datafy

2021 – Top Reasons for Visiting Greater Miami



International

	January	February	March	April	May	June
Vacation/Pleasure	63%	60%	73%	66%	56%	50%
Receive a COVID vaccine*	--	--	--	--	--	37%
Shopping	40%	21%	24%	18%	31%	34%
Visit relatives	32%	11%	14%	22%	21%	29%
Visit friends	15%	18%	19%	23%	31%	27%



Domestic

	January	February	March	April	May	June
Vacation/Pleasure	61%	68%	70%	73%	66%	63%
Personal reasons	18%	14%	15%	11%	14%	16%
Visit friends	16%	14%	12%	12%	15%	13%
Visit relatives	14%	7%	7%	8%	12%	12%
Business	16%	11%	13%	9%	8%	11%



Source: 2021 GMCVB Visitor Profile

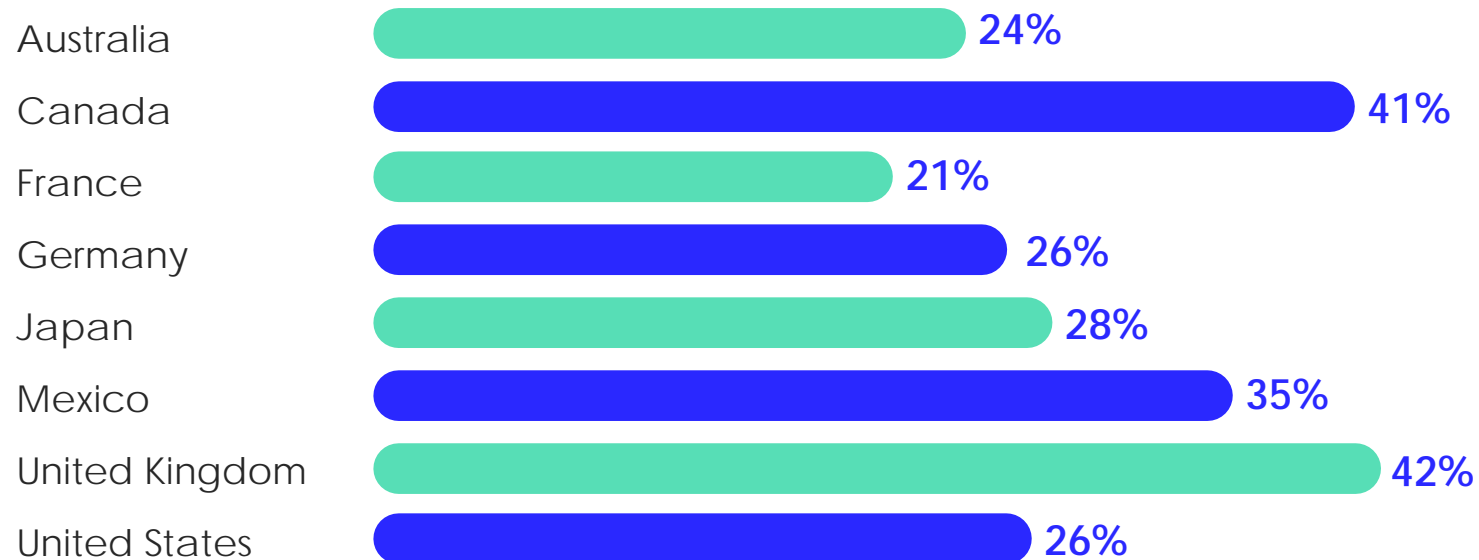
*option added June 2021

Vaccination programs boost traveler confidence



How important is the COVID-19 vaccine in determining travelers' plans for their next trip?

Percentage of respondents who said they would not travel at all until they received the vaccine

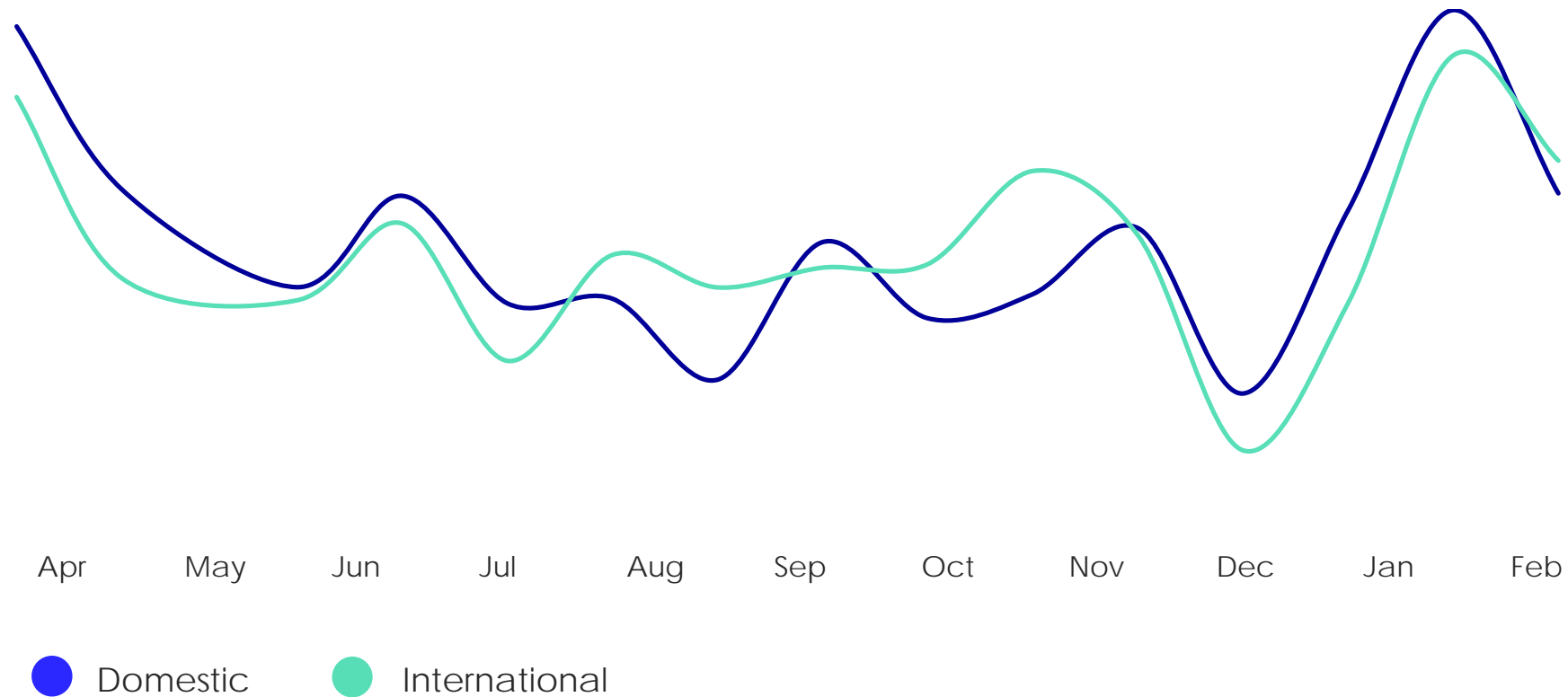


Vaccination programs boost traveler confidence



Percent change in search activity

April 2020 – February 2021



Source: Expedia Group, What travelers want in 2021

© 2021 Expedia, Inc, an Expedia Group Company. All rights reserved. Confidential and proprietary

2021 vs 2020 Future Air Travel Booking Pace- International



Brazil	August	September	October	November	December
As of March 2021	-99.8%	-100.0%	-99.3%	-100.0%	-100.0%
As of June 2021	-59.4%	-64.2%	-63.2%	-71.2%	-70.1%

Mexico	August	September	October	November	December
As of March 2021	-94.3%	-96.5%	-97.9%	-98.1%	-99.0%
As of June 2021	-30.8%	-81.3%	-90.2%	-91.8%	-95.8%

Colombia	August	September	October	November	December
As of March 2021	-41.3%	-94.0%	-93.7%	-98.8%	-98.3%
As of June 2021	432.8%	-52.8%	-73.8%	-94.4%	-93.5%

Argentina	August	September	October	November	December
As of March 2021	-56.7%	-78.9%	-86.0%	-90.6%	-95.7%
As of June 2021	253.8%	-8.5%	-52.8%	-70.1%	-80.9%

Canada	August	September	October	November	December
As of March 2021	-90.7%	-93.3%	-92.0%	-83.5%	-78.7%
As of June 2021	-47.2%	-51.5%	-46.2%	-36.3%	-17.2%

UK	August	September	October	November	December
As of March 2021	-61.2%	-84.3%	-72.9%	-84.3%	-80.3%
As of June 2021	-26.1%	-58.4%	-54.9%	-67.5%	-60.6%

Germany	August	September	October	November	December
As of March 2021	-77.0%	-81.1%	-64.8%	-79.2%	-77.3%
As of June 2021	-49.8%	-45.2%	-29.5%	-53.3%	-39.3%

Future Travel Plans of Florida Residents



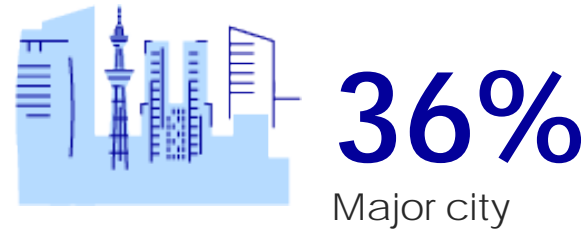
	Wave					
	January 2021	February 2021	March 2021	April 2021	May 2021	June 2021
Miami	43%	51%	51%	50%	53%	47%
Orlando	43%	35%	38%	35%	48%	40%
Tampa / St. Petersburg / Clearwater	24%	30%	25%	30%	38%	34%
Florida Keys	28%	28%	29%	31%	29%	29%
West Palm Beach	27%	32%	31%	29%	28%	27%
St. Augustine / Jax / Daytona Beach	25%	21%	20%	17%	25%	26%
Naples / Fort Myers	23%	17%	15%	17%	15%	21%
Fort Lauderdale	23%	21%	15%	28%	23%	19%
Cocoa Beach / Melbourne / Vero Beach	17%	21%	19%	21%	19%	17%
Florida Panhandle	15%	13%	12%	11%	13%	12%
None of these	18%	10%	6%	9%	6%	8%

Source: 2021 GMCVB Visitor Profile

Travel is rebounding in 2021 — and beyond



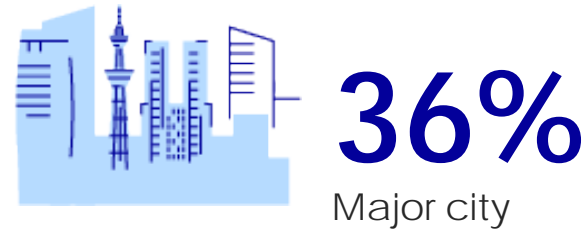
Where are travelers considering a trip to in the next 18 months?



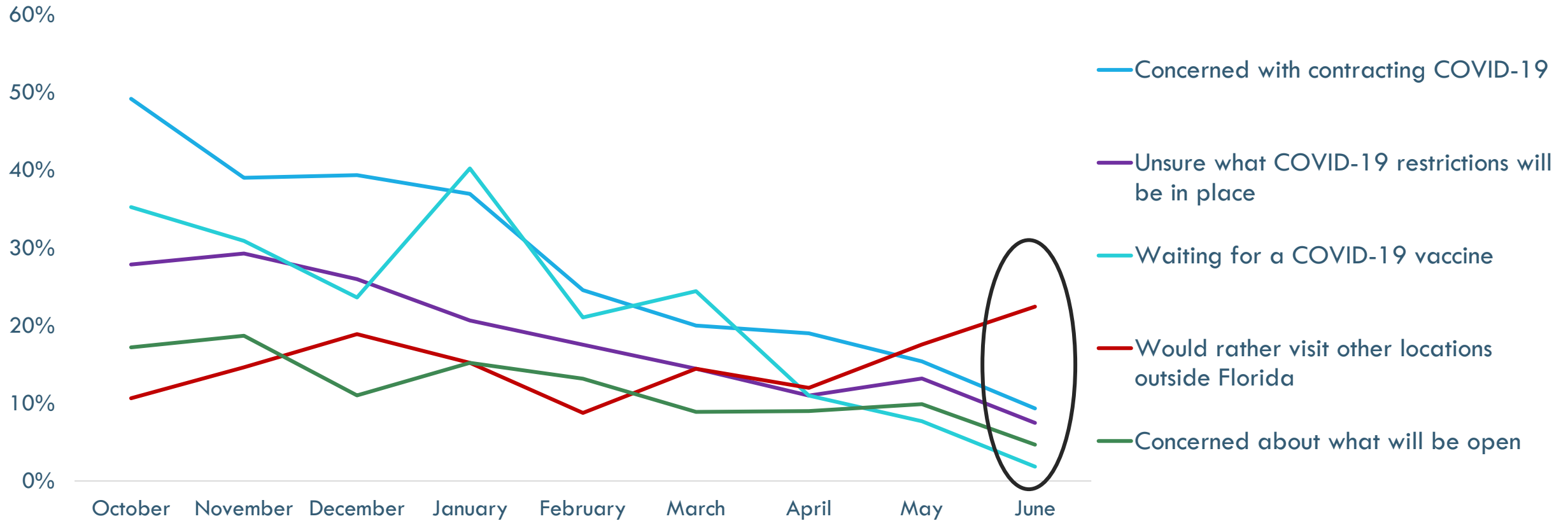
Travel is rebounding in 2021 — and beyond



Where are travelers considering a trip to in the next 18 months?



Reasons Not to Visit Miami in Next 6 Months - Florida Residents



Q: Which of the following are reasons why you might not visit Miami / Miami Beach in the next six months?

Travelers want...



1 To travel close to home



2 To stay longer



3 To envision their stay



4 To feel at home



5 To have active communication



1 Travelers want... to travel close to home



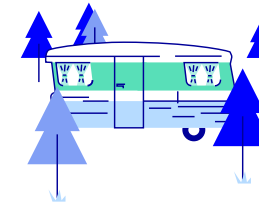
Which are travelers likely to choose for their next vacation?



A drivable destination
somewhat close to home



A longer stay



Outdoor tours
or activities

Global	33%	24%	23%
Australia	38%	27%	26%
Canada	35%	24%	24%
France	28%	24%	18%
Germany	39%	25%	21%
Japan	27%	10%	11%
Mexico	34%	25%	42%
UK	27%	29%	21%
US	32%	27%	23%

2 Travelers want... to stay longer

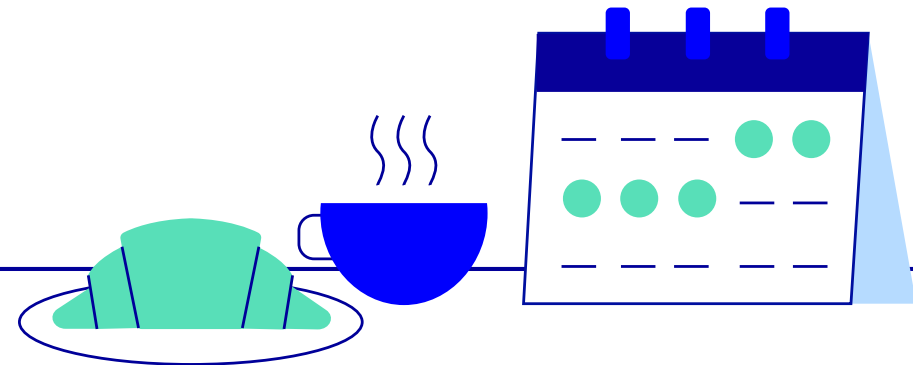


A longer stay

was the second most popular choice for a next vacation.

Top reasons travelers are more likely to book an extra night:

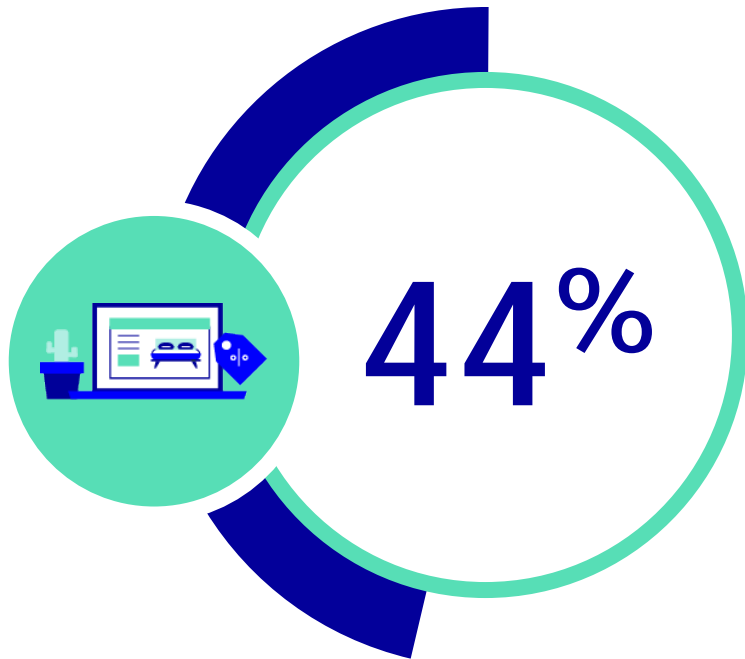
1. A discount
2. Free breakfast
3. Upgraded room
4. Drink or food vouchers
5. Attending an event or experience unique to the location



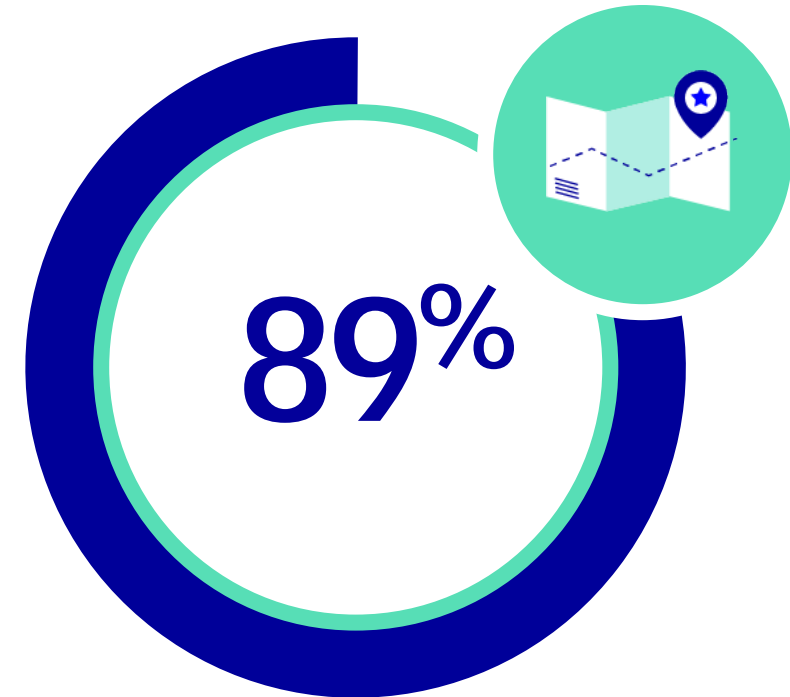
3 Travelers want... to envision their stay



Detailed property and neighborhood descriptions



said an informative property description gave them confidence to book an accommodation.

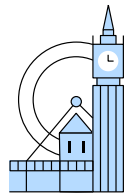


want to see information or features of the surrounding location.

3 Travelers want... to envision their stay



Which features of a surrounding location, if any, do travelers want to see information on when booking an accommodation?



Tourist sites
and cultural venues



Bars and
restaurants



Shopping
facilities



Nearby cities
and towns



Parks
and trails

	Tourist sites and cultural venues	Bars and restaurants	Shopping facilities	Nearby cities and towns	Parks and trails
Global	59%	44%	44%	44%	38%
Australia	59%	49%	53%	42%	41%
Canada	59%	52%	50%	38%	40%
France	59%	43%	44%	53%	42%
Germany	57%	38%	34%	52%	47%
Japan	61%	32%	46%	23%	15%
Mexico	74%	42%	41%	57%	45%
UK	57%	54%	45%	50%	37%
US	47%	44%	40%	36%	34%

Source: Expedia Group, What travelers want in 2021

3 Travelers want... to envision their stay



Accurate and abundant information

57%

said many detailed photos give them confidence to book.



88%

said it's important to see photos of amenities before booking a hotel.



2021 Miami-Dade County Future Hotel Outlook



	Q3 2021	% Change from 2019	Q4 2021	% Change from 2019	Full Year 2019	Full Year 2021	% Change
Occupancy	67.1%	0.0%	69.4%	-4.3%	73.5%	67.1%	-8.7%
Room Rate	\$215.33	+47.3%	\$213.32	+8.5%	\$195.35	\$221.92	+13.6%
RevPAR	\$144.53	+47.4%	\$148.14	+3.8%	\$143.58	\$148.99	+3.8%

Source: STR May 2021 Forecast

The travel landscape is ever-changing. While our industry has been amazingly resilient and recovery is underway, there are some challenges ahead:

- Leisure & Hospitality Labor Shortages
- Delta Variant
- Masks / Social Distancing
- Consumer Confidence
- Increased Competition From Other Travel Destinations
- Travel Restrictions

Thank you!!!

<https://www.expedia.com/>

<https://www.miamiandbeaches.com/gmcvb-partners/tools-resources/research-statistics-reporting>

