

Estimates of Visitors to Florida

Prepared by VISIT FLORIDA
Research Department

Summary of Visitors to Florida

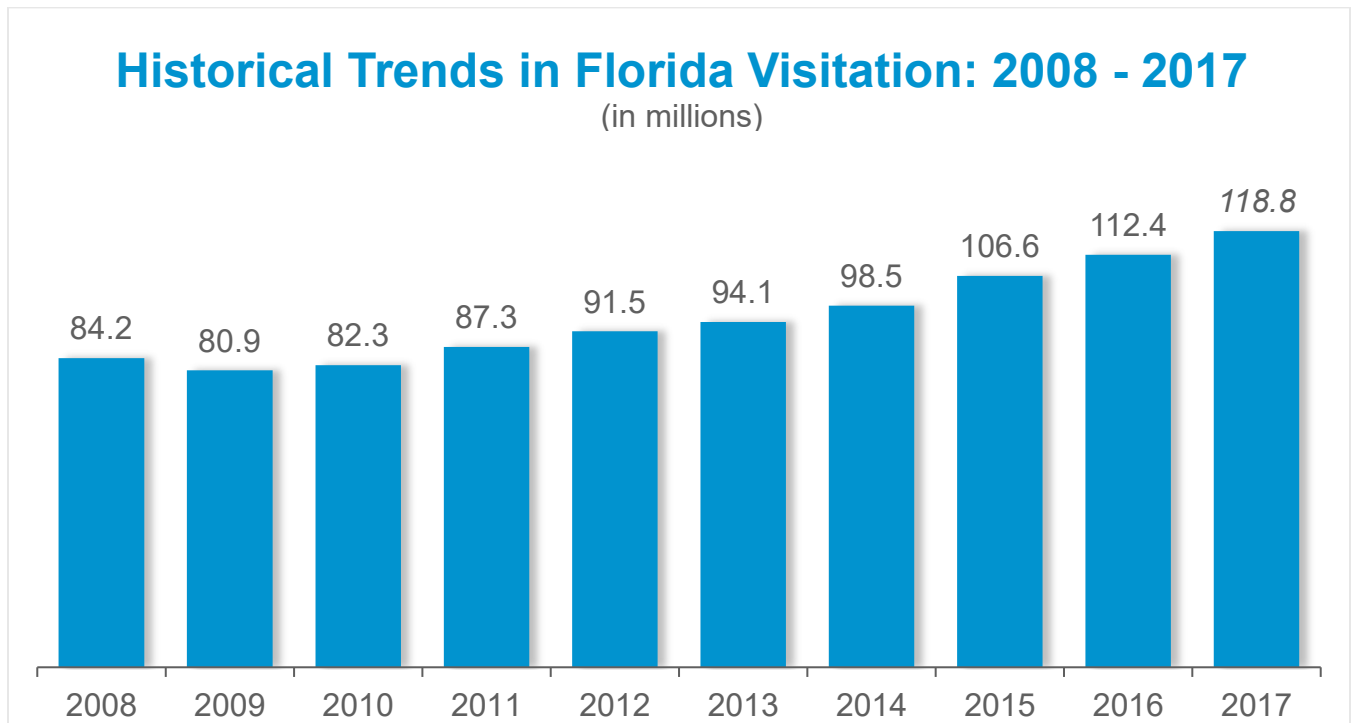
Florida welcomed an estimated *118.8* million overnight visitors during the 2017 calendar year. Domestic visitors who traveled to Florida from out-of-state represented *87.9%* of Florida's total visitors, while international visitors accounted for the remaining *12.1%*, with the overseas segment and Canadian segment representing approximately *9.2%* and *2.9%* of total visitation, respectively.

The ratio of visitors who traveled to Florida by air and non-air was slightly greater for non-air, with *48.0%* of Florida's visitors arriving by air and *52.0%* by non-air transportation.

Domestic travelers were more likely to drive than visitors overall, with *57.7%* of domestic visitors traveling to Florida by non-air transportation. Canadian visitors were more likely to fly, with *56.7%* traveling to the state by air. All overseas visitors arrived by air.

In 2017, Florida visitation continued to increase, with estimates indicating Florida hosted nearly *6.4* million more visitors than the previous year, amounting to a *5.7%* increase in visitation.

Passenger enplanements, one of the key indicators in gauging visitation, at Florida's 18 commercial airports experienced an increase of *4.3%* for the year. Overall, enplanements grew by more than *3.5* million passengers during 2017.



Note: Figures in italics are considered preliminary.

Source: TNS TravelsAmerica; D.K. Shifflet & Associates, Inc; Statistics Canada; U.S. Department of Commerce, ITA, Tourism Industries; Visa Vue Travel; Diio, LLC aviation data.

Estimates of Visitors to Florida by Quarter

Calendar Year 2017: January to December

(in Thousands of Person-Trips)

		Domestic	Overseas	Canadian	Total	% of Total
Q1	Air	12,469	2,691	758	15,919	49.9%
	Non-Air	15,364	**	608	15,972	50.1%
Total		27,833	2,691	1,366	31,891	100.0%
% Change 17/16		6.1%	-2.5%	2.3%	5.2%	
Q2	Air	11,109	2,647	387	14,143	47.1%
	Non-Air	15,341	**	534	15,875	52.9%
Total		26,449	2,647	921	30,017	100.0%
% Change 17/16		7.8%	2.0%	3.3%	7.1%	
Q3	Air	9,224	2,705	322	12,251	44.0%
	Non-Air	15,439	**	164	15,603	56.0%
Total		24,663	2,705	486	27,854	100.0%
% Change 17/16		3.8%	-4.8%	13.3%	3.0%	
Q4	Air	11,317	2,888	489	14,694	50.7%
	Non-Air	14,114	**	185	14,299	49.3%
Total		25,431	2,888	674	28,993	100.0%
% Change 17/16		8.8%	-2.5%	-2.3%	7.3%	
CY 2017	Air	44,119	10,931	1,956	57,006	48.0%
	Non-Air	60,258	**	1,491	61,749	52.0%
Total		104,377	10,931	3,447	118,756	100.0%
% Change 17/16		6.6%	-2.0%	3.0%	5.7%	

Note: Figures in italics are considered preliminary. Figures have been rounded to the nearest thousand and may not sum to the total as a result.

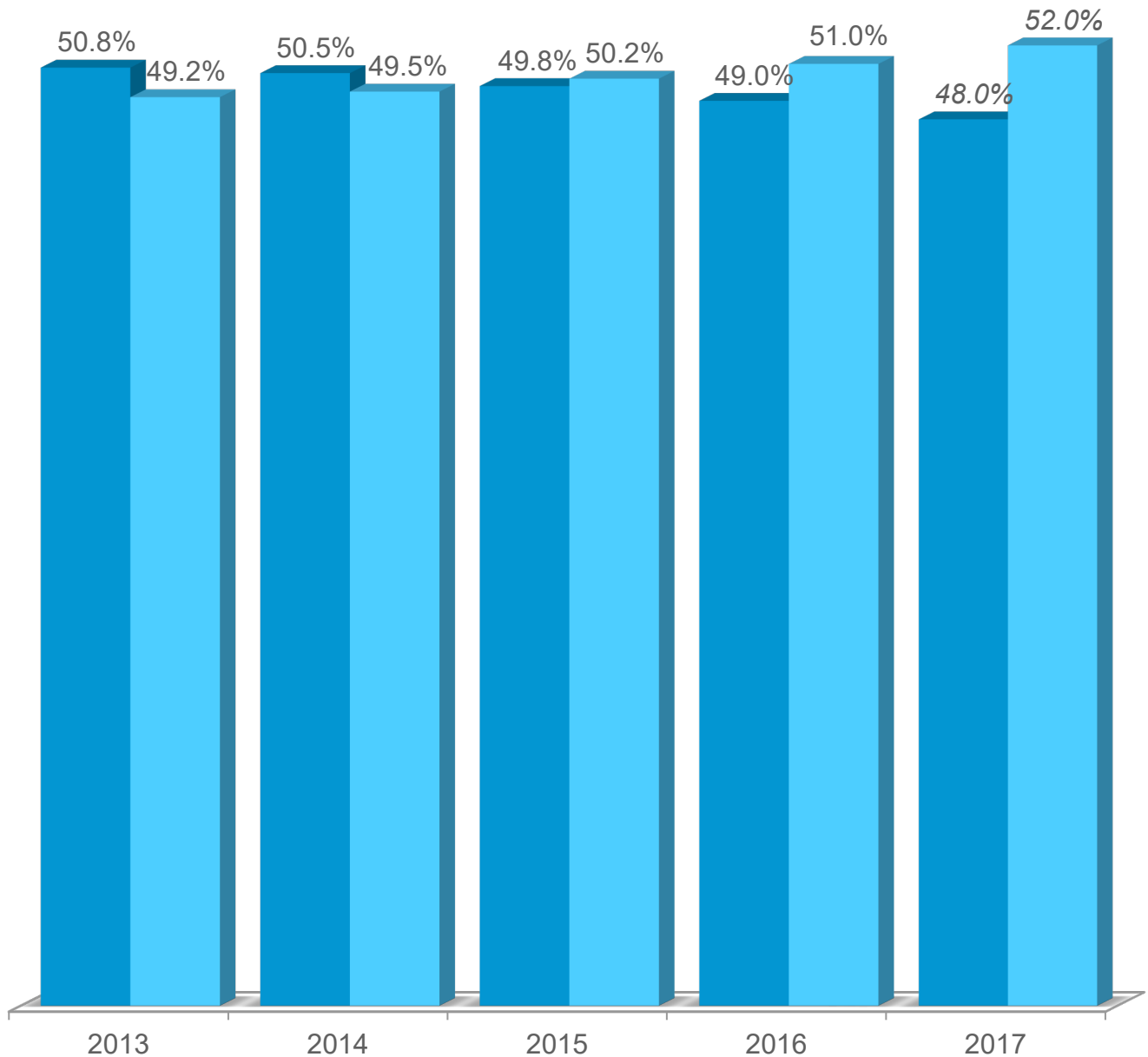
** Not applicable

Source: TNS TravelsAmerica; D.K. Shifflet & Associates, Inc; Statistics Canada; U.S. Department of Commerce, ITA, Tourism Industries; Visa Vue Travel; Diio, LLC aviation data

Relative Share of Florida's Total Air and Non-Air Visitors

Calendar Years 2013 - 2017

■ Air ■ Non-air

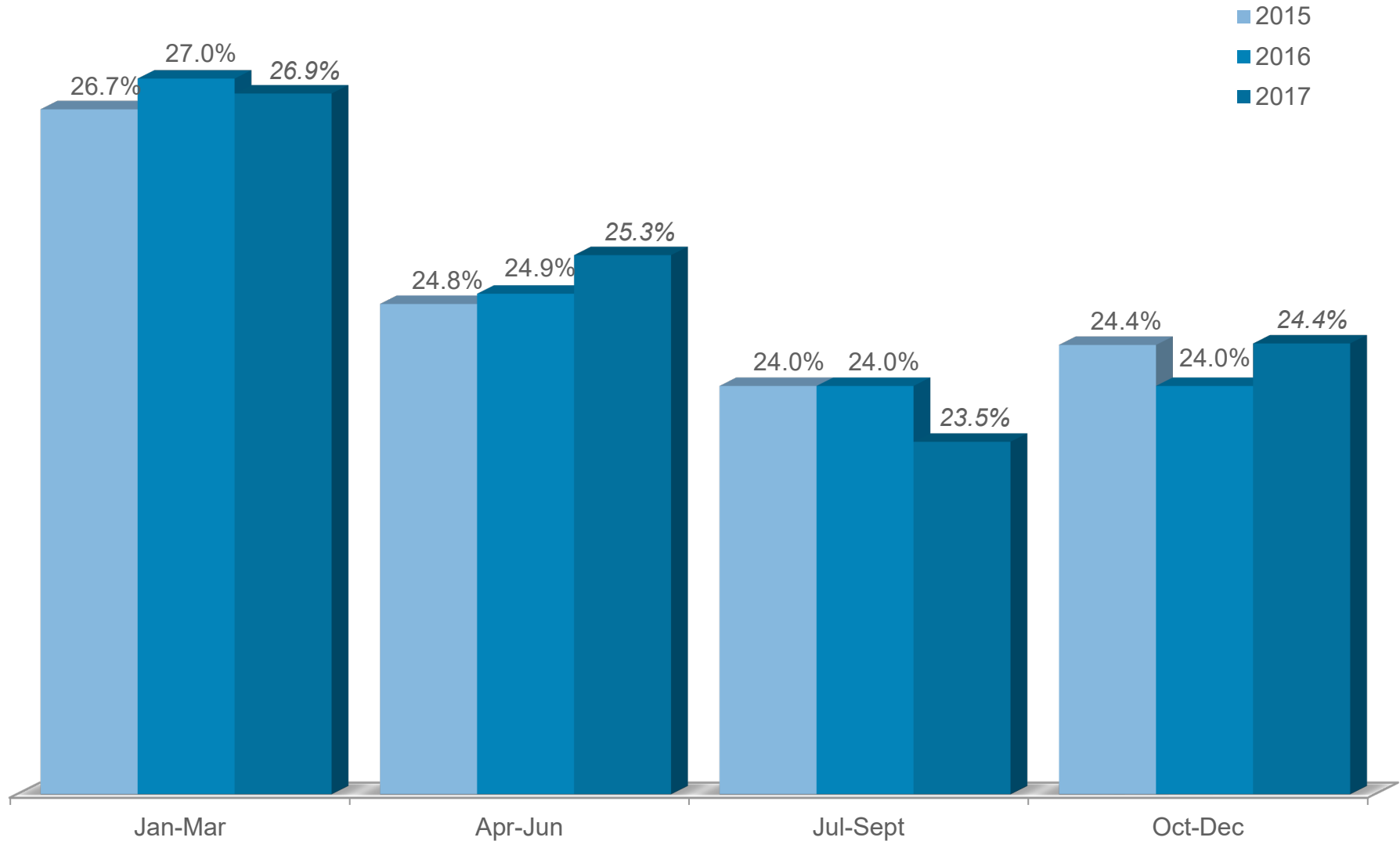


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Visitors to Florida by Quarter

Calendar Years 2014 - 2017



Note: Figures in italics are considered preliminary.

Source: TNS TravelsAmerica; D.K. Shifflet & Associates, Inc; Statistics Canada; U.S. Department of Commerce, ITA, Tourism Industries; Visa Vue Travel; Diio, LLC aviation data.

Enplanement Comparison at 18 Florida Airports

Nearly 87.3 million enplanements occurred at the 18 commercial airports in Florida during 2017, amounting to a collective increase of 4.3% from that of 2016. This increase represented over 3.5 million more enplanements than the previous year.

Fifteen of the 18 airports reported an increase in enplanements, with the largest percent increase observed at Okaloosa (+28.6%), followed by Punta Gorda (+15.3%) and St.Petersburg-Clearwater (+11.6%). Of the three airports reporting decreased enplanements, Sarasota had the largest percent decrease (-2.2%).

Fort Lauderdale International Airport experienced the largest numerical increase, with 1.6 million more enplaned passengers than in 2016. Orlando International Airport observed the most enplanements, reaching more than 22.1 million enplanements during 2017, up 6.4%. Miami experienced the second most enplanements at more than 21.7 million, a -1.3% decrease from 2016.

Florida Airport	Calendar Year 2016	Calendar Year 2017	% Change '16/'17
Daytona	355,157	362,327	2.0%
Ft Lauderdale	14,628,682	16,216,686	10.9%
Ft Myers	4,350,650	4,461,304	2.5%
Jacksonville	2,799,363	2,794,981	-0.2%
Key West	375,506	388,274	3.4%
Melbourne	223,356	225,024	0.7%
Miami	22,036,993	21,747,189	-1.3%
Okaloosa	457,196	588,090	28.6%
Orlando International	20,794,484	22,115,929	6.4%
Orlando Sanford	1,361,714	1,443,832	6.0%
Palm Beach	3,134,971	3,166,532	1.0%
Panama City	447,466	470,504	5.1%
Pensacola	805,045	851,486	5.8%
Punta Gorda	558,471	643,998	15.3%
Sarasota	594,167	581,250	-2.2%
St.Petersburg-Clearwater	914,958	1,021,361	11.6%
Tallahassee	354,699	363,064	2.4%
Tampa	9,490,783	9,833,335	3.6%
Total Enplanements	83,683,661	87,275,166	4.3%

Source: Individual Florida Airports

Note: Includes Florida visitors and residents

Florida Visitor Estimation Methodology

On July 1, 1999, VISIT FLORIDA implemented the current system for producing domestic visitor estimates, applying recommendations made by the University of North Florida. VISIT FLORIDA commissioned a review of our visitor estimation methodology in 2008 and revisions have been made to both our domestic and international estimates.

VISIT FLORIDA collects enplanement data for Florida's 18 major airports to assist in deriving a preliminary estimate of domestic visitors to Florida by air. VISIT FLORIDA subscribes to Diio O&D data that provides an actual air estimate of visitors 100 days after the quarter ends, which the preliminary number is then revised to. In order to estimate non-air visitation, VISIT FLORIDA subscribes to TNS TravelsAmerica and D. K. Shifflet and Associates DIRECTABS data that combined, provide the ratio of domestic air and non-air visitors to Florida. Collectively, this ratio and the O&D data are utilized to calculate the number of domestic non-air visitors to Florida. It is impractical to collect primary data on the non-air segment. *(Non-air is dominated by private automobiles, but not restricted to it.)*

VISIT FLORIDA's estimates of overseas visitors to Florida are based on and extrapolated from aggregate card usage data provided by VisaVue® Travel and incorporates data from other independent research sources.

VISIT FLORIDA's analyses of Canadian are derived from custom re-tabulations of data collected by the Canadian government through Statistics Canada.