



# FLORIDA VISITOR ESTIMATES AND TRAVEL INDUSTRY TREND INDICATORS

Released February 14, 2025



# SUMMARY OF VISITOR ESTIMATES AND TRAVEL INDUSTRY INDICATORS



## QUARTER FOUR 2024: OCTOBER - DECEMBER

### Visitor Estimates:

- > Preliminary estimates indicate that *33.1 million* total visitors (in person-trips) traveled to Florida in the fourth quarter (Q4) of 2024, a *+0.7%* increase from Q4 2023 and a record high for a fourth quarter.
- > Domestic visitors accounted for *90.3%* of the total, down from *90.8%* in Q4 2023, while overseas visitors accounted for *7.5%* and Canadian visitors for *2.2%*.
- > Domestic visitation is estimated at *29.9 million* in Q4 2024, a *+0.2%* increase from Q4 2023.
- > The preliminary air/non-air ratio for domestic non-resident visitors in Q4 2024 is estimated to be *37.5% / 62.5%*.
- > Overseas visitation is estimated at *2.5 million* Q4 2024, a *+5.9%* increase from Q4 2023. Overseas visitation was down by *-3.9%* from Q4 2019, closer to pre-pandemic levels than any quarter since the onset of the pandemic.
- > Canadian visitation is estimated at *742 thousand* in Q4 2024, a *+6.7%* increase from Q4 2023 but down by *-32.0%* from Q4 2019.

### Travel Industry Trend Indicators:

- > Total enplanements at 19 Florida airports totaled *26.6 million* in Q4 2024, down *-3.2%* from Q4 2023. Orlando International had the largest number of enplanements with *6.839 million* (*-7.6%*), followed by Miami with *6.835 million* (*+2.4%*). Punta Gorda (*+11.9%*), Tallahassee (*+11.3%*), and Key West (*+11.0%*) were the fastest growing airports in the state. Ten airports saw declines, with the most significant decreases at Sarasota (*-16.9%*), likely reflecting the impact of Hurricanes Helene and Milton.
- > Domestic enplanements at 19 Florida airports totaled *21.3 million* in Q4 2024, down *-4.5%* from Q4 2023. Domestic enplanements accounted for *80.0%* of total enplanements, down from *81.1%* in Q4 2023.
- > Florida hotels recorded a *+1.7%* increase in rooms sold in Q4 2024 compared to Q4 2023. Occupancy rose by *+6.7%*, while average daily rates rose by *+1.8%*.

**Note:** Figures shown in italics are preliminary and subject to revision.

# SUMMARY OF VISITOR ESTIMATES AND TRAVEL INDUSTRY INDICATORS



## CALENDAR YEAR 2024

### Visitor Estimates:

- > Preliminary estimates indicate that *142.9 million* total visitors (in person-trips) traveled to Florida in calendar year (CY) 2024, an increase of +1.6% from CY 2023 and a record high.
- > Domestic visitation accounted for *91.5%* of total visitation in 2024, the lowest share since pre-pandemic 2019. Overseas visitation made up *6.2%* of the total, up from *5.9%* in 2023, while Canadian visitation accounted for *2.3%*.
- > Domestic visitation is estimated at *130.7 million* in 2024, a +1.3% increase from 2023. This is the largest number of domestic annual visitors on record.
- > Preliminary estimates indicate an air/non-air split for domestic visitors of *36.0% / 64.0%* in 2024, with a larger share traveling by air than in 2023.
- > Overseas visitation is estimated at *8.9 million* in 2024, up by +6.6% compared to 2023. Overseas visitation came closer to full recovery than any year since the start of the pandemic, with visitation down by -9.6% from 2019.
- > Preliminary estimates indicate that Canadian visitation totaled *3.3 million* in 2024, up by +1.2% over 2023. While down -20.0% from pre-pandemic 2019, this marks the closest that Canadian visitation has come to pre-pandemic levels.

### Travel Industry Trend Indicators:

- > Total enplanements at 19 Florida airports grew by +3.1% in CY 2024 from CY 2023. Orlando International saw the largest number of enplanements with *28.5 million* (-0.8%), while Miami ranked second with *28.0 million* (+7.3%). Three airports in Northwest Florida recorded the fastest growth in the state: Tallahassee (+13.8%), Panama City (13.4%), and Pensacola (+12.0%). Melbourne was the bottom performer with a decrease of -4.3%.
- > Domestic enplanements at 19 Florida airports rose by +2.3% in 2024 compared to 2023. Domestic enplanements accounted for *81.0%* of total enplanements, down from *81.6%* the previous year.
- > Room nights sold at Florida hotels increased by +1.6% in 2024 compared to 2023. Growth was concentrated most heavily on the Gulf Coast and in the Daytona and Melbourne areas, with a notable spike in demand following hurricanes Helene and Milton that was related to additional demand from displaced locals and recovery workers. Occupancy rose by +0.4%, while average daily rates edged downward by -0.5%.

**Note:** Figures shown in italics are preliminary and subject to revision.

# FLORIDA VISITOR ESTIMATES

## Quarter Four 2024

(October – December)



## Preliminary Calendar Year 2024

(Including Revised Preliminary Q3 2024)



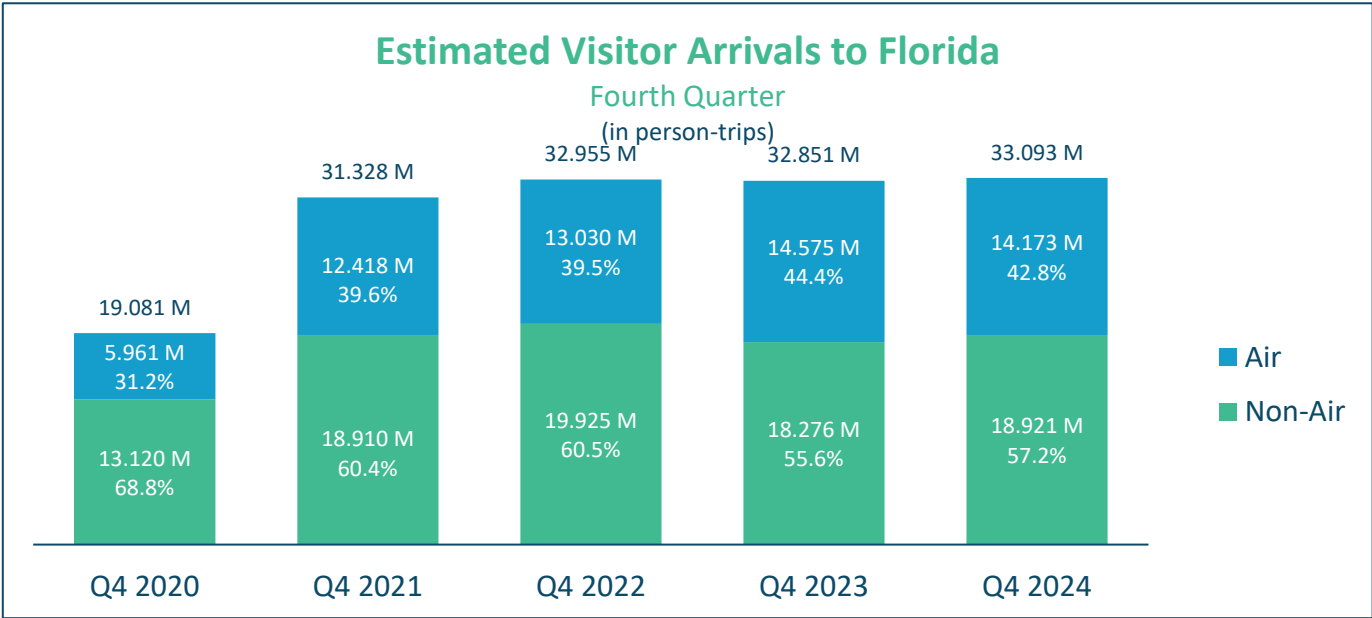
# ESTIMATES OF VISITORS TO FLORIDA

FOURTH QUARTER, 2024 (OCTOBER - DECEMBER)

PRELIMINARY

in person-trips

		DOMESTIC	OVERSEAS	CANADA	TOTAL	% OF TOTAL
2023	Air	11.773 M	2.342 M	460 K	14.575 M	44.4%
	Non-Air	18.041 M		235 K	18.276 M	55.6%
	Total	29.814 M	2.342 M	695 K	32.851 M	
2024	Air	11.202 M	2.479 M	491 K	14.173 M	42.8%
	Non-Air	18.670 M		251 K	18.921 M	57.2%
	Total	29.873 M	2.479 M	742 K	33.093 M	
% Change '24/'23		0.2%	5.9%	6.7%	0.7%	



**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. Figures shown in the table revised February 15, 2025.

**Sources:** TravelTrak America; D.K. Shifflet; Airline Data, Inc; U.S. Department of Commerce, National Travel & Tourism Office; Global Agency Pro

# ESTIMATES OF VISITORS TO FLORIDA



## CALENDAR YEAR 2024

### PRELIMINARY REVISED

in person-trips

		DOMESTIC	OVERSEAS	CANADA	TOTAL	% OF TOTAL
Q1	Air	13.965 M	2.130 M	745 K	16.840 M	41.5%
	Non-Air	23.374 M		341 K	23.714 M	58.5%
	<b>Total</b>	<b>37.338 M</b>	<b>2.130 M</b>	<b>1.086 M</b>	<b>40.554 M</b>	
	% Change '24/'23	0.6%	18.4%	-9.6%	1.1%	
Q2	Air	12.111 M	1.977 M	511 K	14.598 M	42.3%
	Non-Air	19.677 M		267 K	19.944 M	57.7%
	<b>Total</b>	<b>31.788 M</b>	<b>1.977 M</b>	<b>778 K</b>	<b>34.542 M</b>	
	% Change '24/'23	2.7%	1.8%	1.5%	2.7%	
Q3	Air	<i>9.842 M *</i>	2.270 M	396 K *	12.508 M *	36.1% *
	Non-Air	<i>21.906 M *</i>		269 K *	22.175 M *	63.9% *
	<b>Total</b>	<b><i>31.748 M *</i></b>	<b>2.270 M</b>	<b><i>665 K *</i></b>	<b><i>34.683 M *</i></b>	
	% Change '24/'23	1.8% *	1.9%	17.2% *	2.0% *	
Q4	Air	<i>11.202 M</i>	2.479 M	491 K	14.173 M	42.8%
	Non-Air	<i>18.670 M</i>		251 K	18.921 M	57.2%
	<b>Total</b>	<b><i>29.873 M</i></b>	<b>2.479 M</b>	<b>742 K</b>	<b>33.093 M</b>	
	% Change '24/'23	0.2%	5.9%	6.7%	0.7%	
CY 2024	Air	<i>47.120 M *</i>	8.856 M *	2.143 M *	58.119 M *	40.7% *
	Non-Air	<i>83.626 M *</i>		1.128 M *	84.754 M *	59.3% *
	<b>Total</b>	<b><i>130.746 M *</i></b>	<b>8.856 M *</b>	<b><i>3.271 M *</i></b>	<b><i>142.873 M *</i></b>	
	% Change '24/'23	1.3% *	6.6% *	1.2% *	1.6% *	

\* Revised since last estimates release

**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. Figures shown in the table revised February 15, 2025.

**Sources:** D.K. Shifflet; Airline Data, Inc; U.S. Department of Commerce, National Travel & Tourism Office; Global Agency Pro; XBorder Canada

# TOURISM INDUSTRY TREND INDICATORS

## Quarter Four 2024

(October-December)



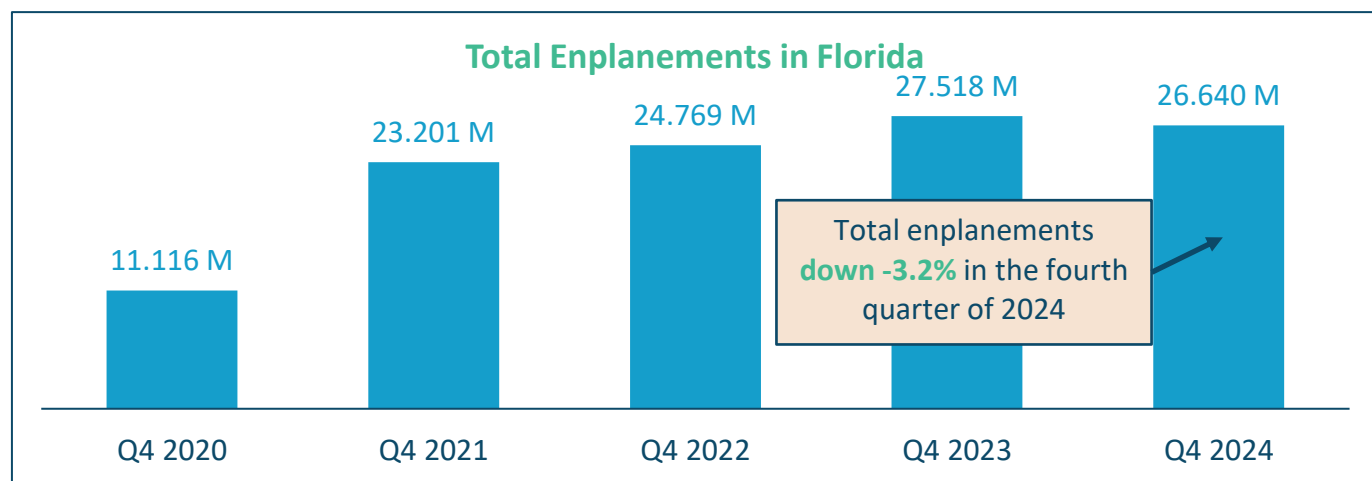
## Calendar Year 2024

# TOTAL ENPLANEMENTS



## QUARTER FOUR 2024 (OCTOBER - DECEMBER)

AIRPORT	QUARTER FOUR 2023	QUARTER FOUR 2024	% CHANGE '24/'23
Daytona	87,762	83,992	-4.3%
Destin-Fort Walton Beach	232,600	238,918	2.7%
Fort Lauderdale	4,432,366	4,193,621	-5.4%
Fort Myers	1,350,040	1,282,095	-5.0%
Gainesville	75,310	72,544	-3.7%
Jacksonville	944,590	949,337	0.5%
Key West	159,764	177,383	11.0%
Melbourne	85,362	80,426	-5.8%
Miami	6,678,331	6,835,410	2.4%
Orlando International	7,401,242	6,838,615	-7.6%
Orlando Sanford	354,964	332,356	-6.4%
Palm Beach	975,408	1,048,839	7.5%
Panama City	178,412	189,870	6.4%
Pensacola	344,423	367,647	6.7%
Punta Gorda	215,389	240,970	11.9%
Sarasota	542,252	450,437	-16.9%
St. Petersburg-Clearwater	260,663	256,660	-1.5%
Tallahassee	117,608	130,869	11.3%
Tampa	3,081,961	2,869,688	-6.9%
Total	27,518,447	26,639,677	-3.2%



Source: Individual Airports

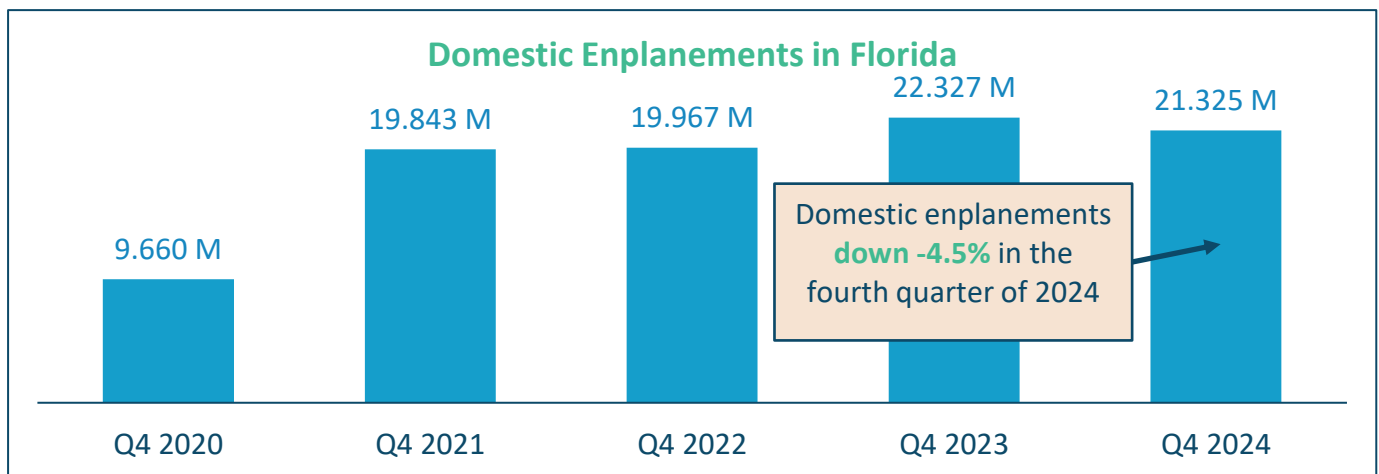


# DOMESTIC ENPLANEMENTS



## QUARTER FOUR 2024 (OCTOBER - DECEMBER)

AIRPORT	QUARTER FOUR 2023	QUARTER FOUR 2024	% CHANGE '24/'23
Daytona	87,762	83,992	-4.3%
Destin-Fort Walton Beach	232,600	238,918	2.7%
Fort Lauderdale	3,424,890	3,330,924	-2.7%
Fort Myers	1,303,653	1,231,765	-5.5%
Gainesville	75,310	72,544	-3.7%
Jacksonville	944,002	949,157	0.5%
Key West	159,764	177,383	11.0%
Melbourne	59,566	63,898	7.3%
Miami	3,664,165	3,682,906	0.5%
Orlando International	6,488,309	5,828,083	-10.2%
Orlando Sanford	343,622	332,217	-3.3%
Palm Beach	964,730	1,032,812	7.1%
Panama City	178,412	189,870	6.4%
Pensacola	344,423	367,647	6.7%
Punta Gorda	215,389	240,970	11.9%
Sarasota	539,814	447,381	-17.1%
St. Petersburg-Clearwater	260,663	256,660	-1.5%
Tallahassee	117,608	130,869	11.3%
Tampa	2,921,955	2,666,764	-8.7%
<b>Total</b>	<b>22,326,637</b>	<b>21,324,760</b>	<b>-4.5%</b>



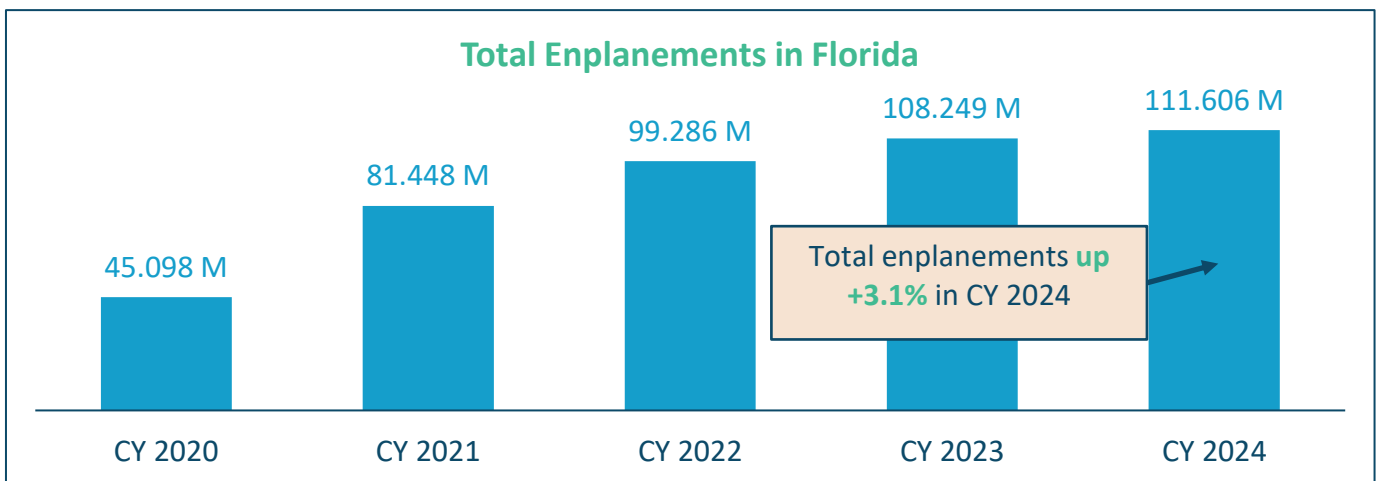
Source: Individual Airports

# TOTAL ENPLANEMENTS



## CALENDAR YEAR 2024

AIRPORT	CY 2023	CY 2024	% CHANGE '24/'23
Daytona	362,260	348,028	-3.9%
Destin-Fort Walton Beach	1,137,283	1,187,055	4.4%
Fort Lauderdale	17,515,917	17,465,203	-0.3%
Fort Myers	5,051,933	5,516,013	9.2%
Gainesville	276,051	290,034	5.1%
Jacksonville	3,715,078	3,820,473	2.8%
Key West	656,536	731,052	11.3%
Melbourne	367,703	351,834	-4.3%
Miami	26,125,314	28,041,786	7.3%
Orlando International	28,771,120	28,547,333	-0.8%
Orlando Sanford	1,464,235	1,431,527	-2.2%
Palm Beach	3,889,619	4,220,388	8.5%
Panama City	830,492	942,123	13.4%
Pensacola	1,377,233	1,542,706	12.0%
Punta Gorda	949,936	957,796	0.8%
Sarasota	2,162,785	2,130,759	-1.5%
St. Petersburg-Clearwater	1,219,769	1,227,138	0.6%
Tallahassee	423,383	481,622	13.8%
Tampa	11,951,993	12,373,384	3.5%
<b>Total</b>	<b>108,248,640</b>	<b>111,606,254</b>	<b>3.1%</b>



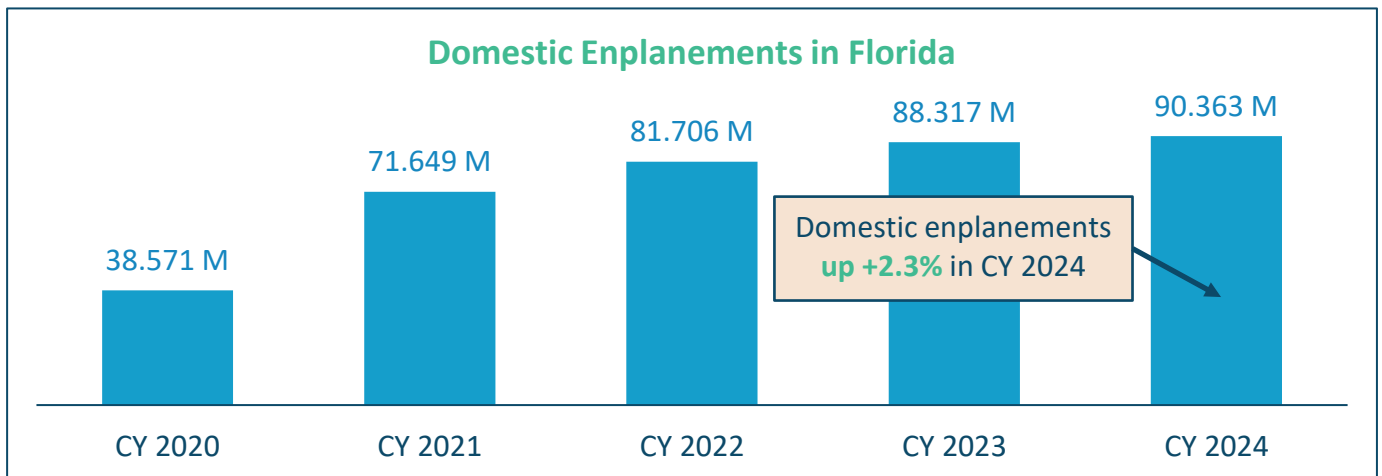
Source: Individual Airports

# DOMESTIC ENPLANEMENTS



## CALENDAR YEAR 2024

AIRPORT	CY 2023	CY 2024	% CHANGE '24/'23
Daytona	362,260	348,028	-3.9%
Destin-Fort Walton Beach	1,137,283	1,187,055	4.4%
Fort Lauderdale	13,644,375	13,847,629	1.5%
Fort Myers	4,894,368	5,335,703	9.0%
Gainesville	276,051	290,034	5.1%
Jacksonville	3,713,911	3,820,141	2.9%
Key West	656,536	731,052	11.3%
Melbourne	249,850	263,439	5.4%
Miami	14,564,009	15,437,978	6.0%
Orlando International	25,286,288	24,634,737	-2.6%
Orlando Sanford	1,399,528	1,398,376	-0.1%
Palm Beach	3,850,374	4,173,935	8.4%
Panama City	830,492	942,123	13.4%
Pensacola	1,377,233	1,542,706	12.0%
Punta Gorda	949,936	957,796	0.8%
Sarasota	2,145,819	2,121,852	-1.1%
St. Petersburg-Clearwater	1,211,596	1,227,138	1.3%
Tallahassee	423,383	481,622	13.8%
Tampa	11,343,380	11,621,617	2.5%
<b>Total</b>	<b>88,316,672</b>	<b>90,362,961</b>	<b>2.3%</b>



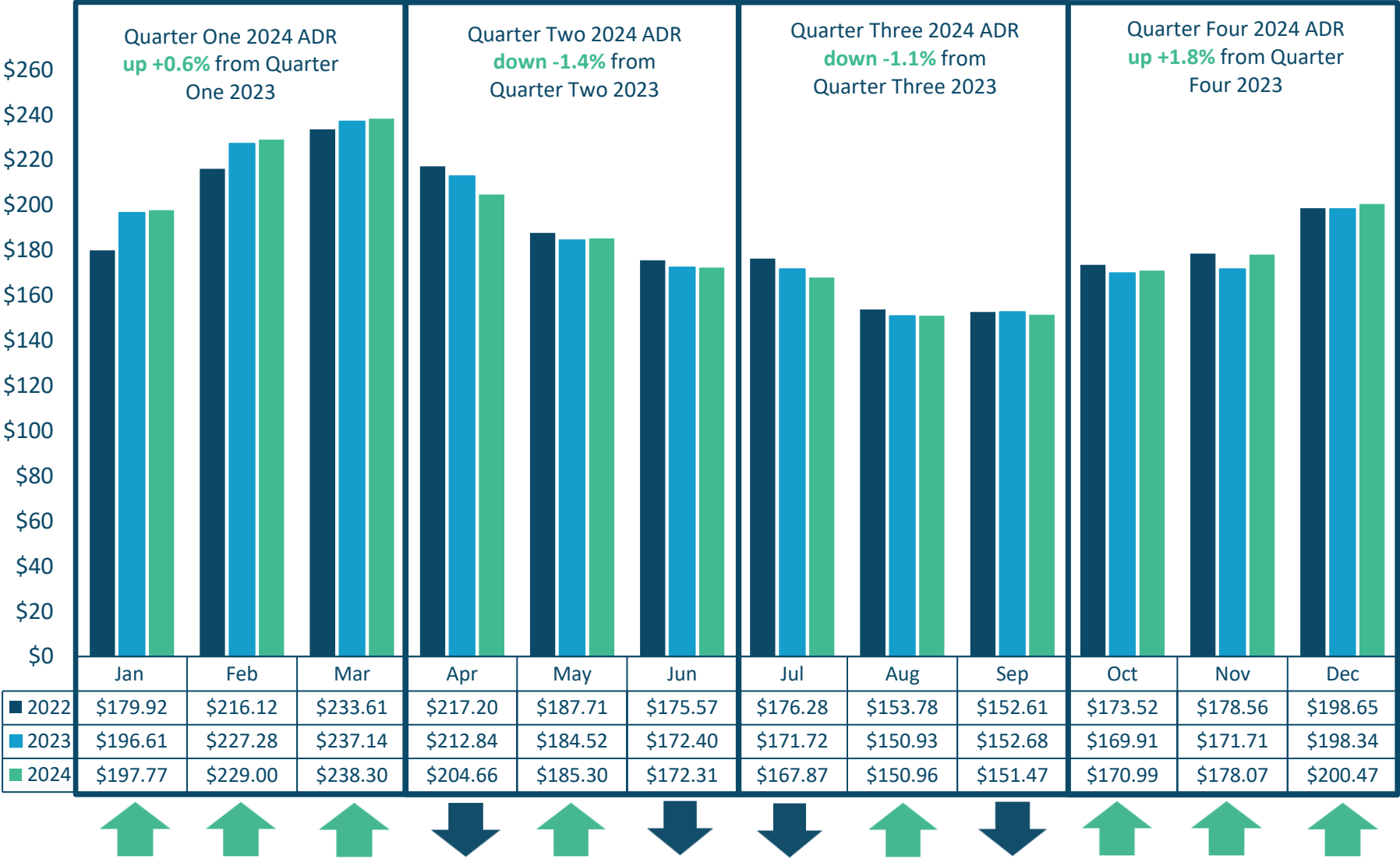
Source: Individual Airports

# HOTEL AVERAGE DAILY RATE



CALENDAR YEARS 2022-2024

ADR in CY 2024 was **down -0.5%** from 2023



Source: STR

# HOTEL OCCUPANCY RATE



CALENDAR YEARS 2022-2024

Occupancy in CY 2024 was **up +0.4%** from 2023



Source: STR

# HOTEL ROOM-NIGHTS SOLD (IN MILLIONS)



CALENDAR YEARS 2022-2024

Rooms sold in CY 2024 were **up +1.6%** from 2023



Source: STR



# FLORIDA VISITOR ESTIMATES METHODOLOGY



The current methodology includes three components of the visitors to Florida:

- > Domestic Visitors (includes air and by non-air)
- > Canadian Visitors (includes air and by non-air)
- > Overseas Visitors (air visitors only)

## DOMESTIC

VISIT FLORIDA collects enplanement data for 19 of Florida's airports used in developing a preliminary estimate of domestic visitors to Florida by air 45 days after the quarter ends. VISIT FLORIDA subscribes to Airline Data Inc. data that provides an actual air estimate of non-resident visitors to all Florida airports 100 days after the quarter ends, which is used to revise the estimate. In order to estimate non-air visitation, VISIT FLORIDA subscribes to D. K. Shifflet's Travelab dataset that provides the ratio of domestic air and non-air visitors to Florida. Collectively, this ratio and the data obtained from the airports 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 automobile, but not restricted to it in this new system.) This methodology applies to estimates from Jan 1, 2009 to present.

## OVERSEAS

VISIT FLORIDA's estimates of overseas visitors to Florida are extrapolated from I-94 international arrivals data collected by U.S. Customs and Border Protection. The I-94 visitor counts are adjusted based on data from Global Agency Pro in order to account for overseas visitors who go to another destination in the U.S. before later visiting Florida. This methodology applies to estimates from Jan 1, 2015 to present.

## CANADA

VISIT FLORIDA's preliminary Canadian estimate is derived by analyzing historic visitor data alongside indicators of Canadian travel trends. Final estimates are developed by XBorder Canada based on large sample survey data and travel statistics collected by the Canadian government. This methodology applies to estimates from Jan 1, 2019 to present.