



Conferencia Magistral

November 29, 2023

MIAMI
GREATER MIAMI & MIAMI BEACH

GREATER MIAMI
CONVENTION &
VISITORS BUREAU





ROLANDO AEDO

Chief Operating Officer
Greater Miami
Convention & Visitors Bureau

VISION

A global leisure and business destination that delivers culturally rich, diverse and innovative experiences inspiring boundless passion in visitors and residents alike.

MISSION

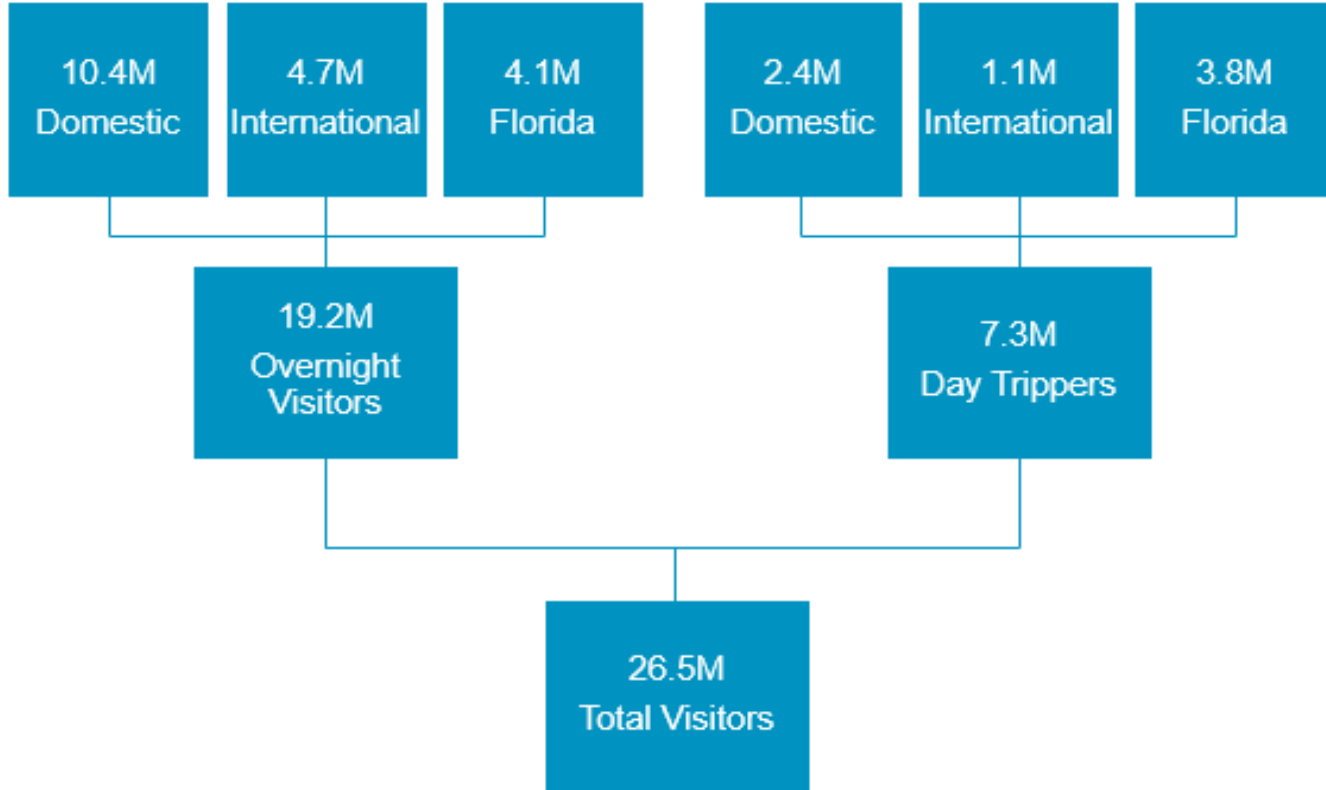
Generate travel demand to Greater Miami & Miami Beach to maximize economic impact on the community, ensure industry resiliency and elevate residents' quality of life.

2022 Visitor Volume

Greater Miami & Miami Beach Visitors (000s)

	2020	2021	2022	2022 v 2021
Domestic Overnight Visitors	4,328	8,719	10,369	19%
International Overnight	1,842	3,747	4,743	27%
Florida Resident Overnight Visitors	1,708	3,450	4,057	18%
Total Miami Overnight Visitors	7,877	15,915	19,169	20%
Domestic Day Visitors	1,421	3,355	2,399	-28%
International Day Visitors	614	1,442	1,100	-24%
Florida Resident Day Visitors	1,682	3,508	3,832	9%
Total Day Visitors	3,717	8,304	7,332	-12%
Total	11,594	24,220	26,501	9%

Greater Miami and Miami Beach Visitors - 2022

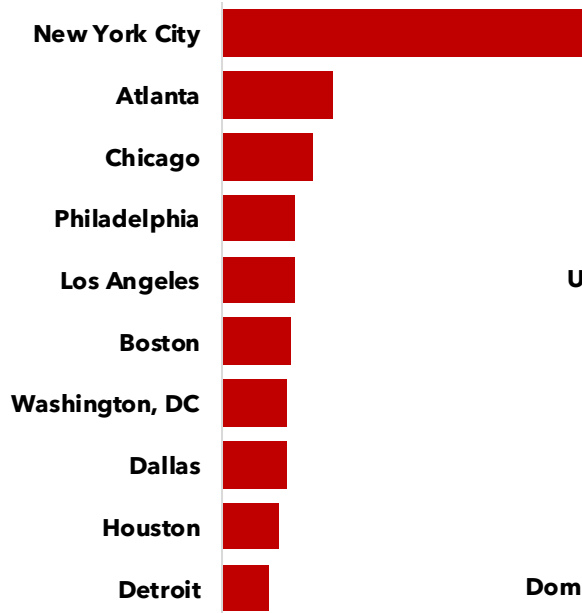


2022 Visitor Spend

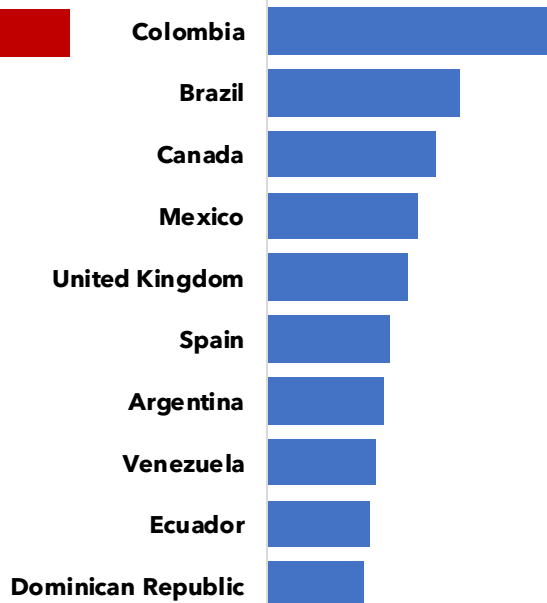
Total Visitor Spend in Billions				
Segment	2020	2021	2022	Variance to 2021 (%)
Domestic	\$4,153	\$9,315	\$11,367	22%
International	\$2,501	\$6,743	\$6,058	-10%
FL Resident	\$1,262	\$2,747	\$3,366	23%
Total	\$7,916	\$19,222	\$20,792	11%

2022 Visitor Markets

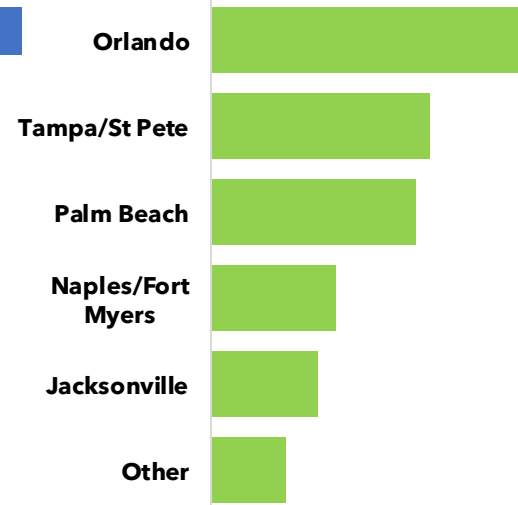
Top 10 Domestic



Top 10 International

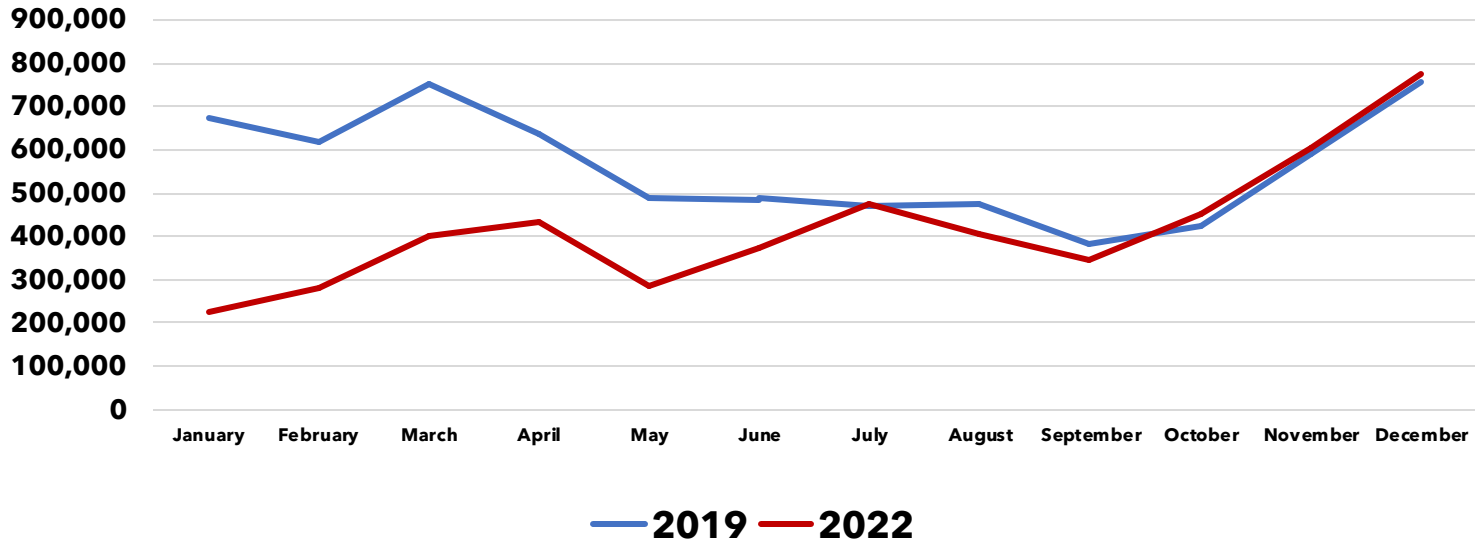


Top 5 Florida Resident

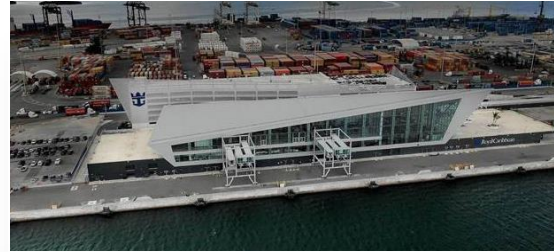


Total Passengers			
	2019	2021	2022
Passengers	6,749,382	1,053,353	5,055,350

Monthly Passenger Volume - 2022 vs 2019



Passenger Terminal Investments



CTA - Royal Caribbean
Opened - November 2018
Architect - Broadway Malyan
Shore Power coming
in Winter 2023



CTB - Norwegian Cruise Line
Opened - August 2021
Architect - Bermello Ajamil
Shore Power coming in Winter 2023

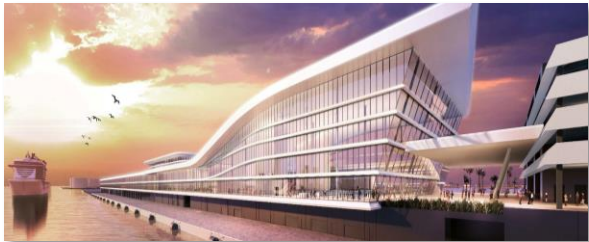


CTV - Virgin Voyages
Opened - February 2022
Architect - Arquitectonica
Shore Power coming in Winter 2023

Passenger Terminal Investments



CT F - Carnival Cruise Line
Opened - November 2022
Architect - Berenblum Busch
Shore Power coming in Winter 2023



CT AA/AAA - MSC Cruise Line
Groundbreaking - March 2022
Completion date - Fall 2023
Architect - Arquitectonica
Shore Power coming in Winter 2023

2022 Miami-Dade County Hotel Performance

	2022	2021	% Change
Occupancy	72.1%	75.9%	-5.0%
Average Daily Rate (ADR)	\$253.11	\$196.52	28.8%
Revenue Per Available Room (RevPAR)	\$182.55	\$149.19	22.4%

Miami-Dade County - First 9 Months 2023 Visitation

	Domestic	% vs 2022	International	% vs 2022	Florida Resident	% vs 2022	Total	% vs 2022
Q1 2023	3,650,000	2%	1,600,000	19%	1,400,000	13%	6,650,000	8%
Q2 2023	3,100,000	-7%	1,500,000	1%	1,300,000	6%	5,900,000	-3%
Q3 2023	2,900,000	7%	1,500,000	1%	2,200,000	-17%	6,600,000	-3%
Total	9,650,000	0%	4,600,000	7%	4,900,000	-4%	19,150,000	1%

2023 vs 2019	7,000,000	39%	5,300,000	-14%	5,500,000	-11%	17,800,000	8%
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Rank	Region	% vs 2022
1	New York	7%
2	Atlanta	8%
3	Chicago	18%
4	Dallas-Ft. Worth	13%
5	Houston	-1%

Rank	Country	% vs 2022
1	Colombia	-2%
2	Brazil	17%
3	Canada	17%
4	Mexico	-10%
5	United Kingdom	-1%

Top 25 Hotel Markets - January to October 2023

Occupancy			
Rank	Region	%	% vs 2022
1	New York	80.8%	9.6%
2	Oahu Island	80.4%	5.7%
3	Las Vegas	79.2%	5.8%
4	San Diego	75.6%	1.5%
5	Boston	73.8%	7.2%
6	Orlando	73.2%	-0.5%
7	Los Angeles	73.0%	2.2%
8	Anaheim	72.3%	2.1%
9	Denver	72.1%	3.1%
10	Miami-Dade	71.6%	-2.2%

Average Daily Rate			
Rank	Region	\$	% vs 2022
1	New York	\$287.76	8.5%
2	Oahu Island	\$278.96	6.4%
3	Boston	\$229.33	6.3%
4	San Francisco	\$225.99	5.6%
5	Miami-Dade	\$218.31	-5.7%
6	San Diego	\$214.27	2.6%
7	Anaheim	\$211.92	3.4%
8	Los Angeles	\$200.22	1.8%
9	Orlando	\$193.11	5.3%
10	Las Vegas	\$191.34	10.6%

RevPAR			
Rank	Region	\$	% vs 2022
1	New York	\$232.59	18.9%
2	Oahu Island	\$224.16	12.5%
3	Boston	\$169.29	14.0%
4	San Diego	\$162.02	4.2%
5	Miami-Dade	\$156.30	-7.7%
6	Anaheim	\$153.16	5.5%
7	San Francisco	\$152.10	8.8%
8	Las Vegas	\$151.54	17.0%
9	Los Angeles	\$146.11	4.1%
10	Orlando	\$141.38	4.8%

Hotel Inventory as of October 31, 2023

	Properties	Rooms
Aventura/Sunny Isles	16	3,735
Surfside/Bal Harbour	13	1,361
Miami Beach	220	21,729
Downtown Miami/Brickell	56	10,995
Central Dade	30	2,789
South Dade	39	2,902
Airport	66	10,545
North Dade	58	4,131
Coral Gables	28	2,464
Doral	33	4,824
Coconut Grove/Key Biscayne	14	1,749
TOTAL	571	66,044

New Hotel Supply (Oct 2022 - Sep 2023)

**Average
Daily Room
Supply**

66,176

(+3.1%)



World Center
Feb. 23
351 rooms



LOEWS
HOTELS

Nov. 22
242 rooms



Arlo

Arlo Wynwood
Nov. 22
217 rooms



THE ELSER
HOTEL

Nov. 22
581 rooms

Miami International Airport - Arrivals

	2023 vs 2022	2023 vs 2019
International	10.7%	0.4%
Domestic	-2.7%	22.8%
Total	2.9%	11.6%

	2023	2022	2021	2020	2019
International	8,698,955	7,859,188	4,386,439	2,836,363	8,667,203
Domestic	10,718,345	11,015,637	8,357,954	4,118,363	8,730,443
Total	19,417,300	18,874,825	12,744,393	6,954,726	17,397,646

International flights to Miami

Brazil	Belgium	Belize	Poland
Colombia	Chile	Anguilla	United Arab Emirates
Cuba	Guyana	Grenada	Martinique
Dominican Republic	Haiti	Guadeloupe	Korea
Mexico	Paraguay	Israel	Italy
Bahamas	Spain	Luxembourg	Dominica
Canada	Trinidad and Tobago	Virgin Islands	Germany
Ecuador	El Salvador	Portugal	Antigua and Barbuda
Puerto Rico	France	Turkey	Aruba
Guatemala	Cayman Islands	Turks and Caicos Islands	Bermuda
Jamaica	Netherlands Antilles	Saint Lucia	British Virgin Islands
Costa Rica	Nicaragua	Saint Vincent and the	
Panama	Saint Kitts and Nevis	Grenadines	
Honduras	United Kingdom	Saudi Arabia	
Peru	Uruguay	Suriname	
Netherlands	Bolivia	Switzerland	
Argentina	Barbados	Qatar	
		Morocco	

New Expanded Airline Service



Oslo & London Gatwick – September 2023
Paris Charles de Gaulle & Berlin – December 2023



Stockholm & Copenhagen – October 2023



Helsinki – November 2023



Portland, OR – November 2023



Governor's Harbor, Bahamas – February 2024
*23/24 Winter schedule will offer from 150
destinations, the most of any carrier at MIA



Toronto – December 2023



Barcelona – March 2024



Frankfurt – March 2024



Monterrey, MX – July 2024
Merida, MX – July 2024

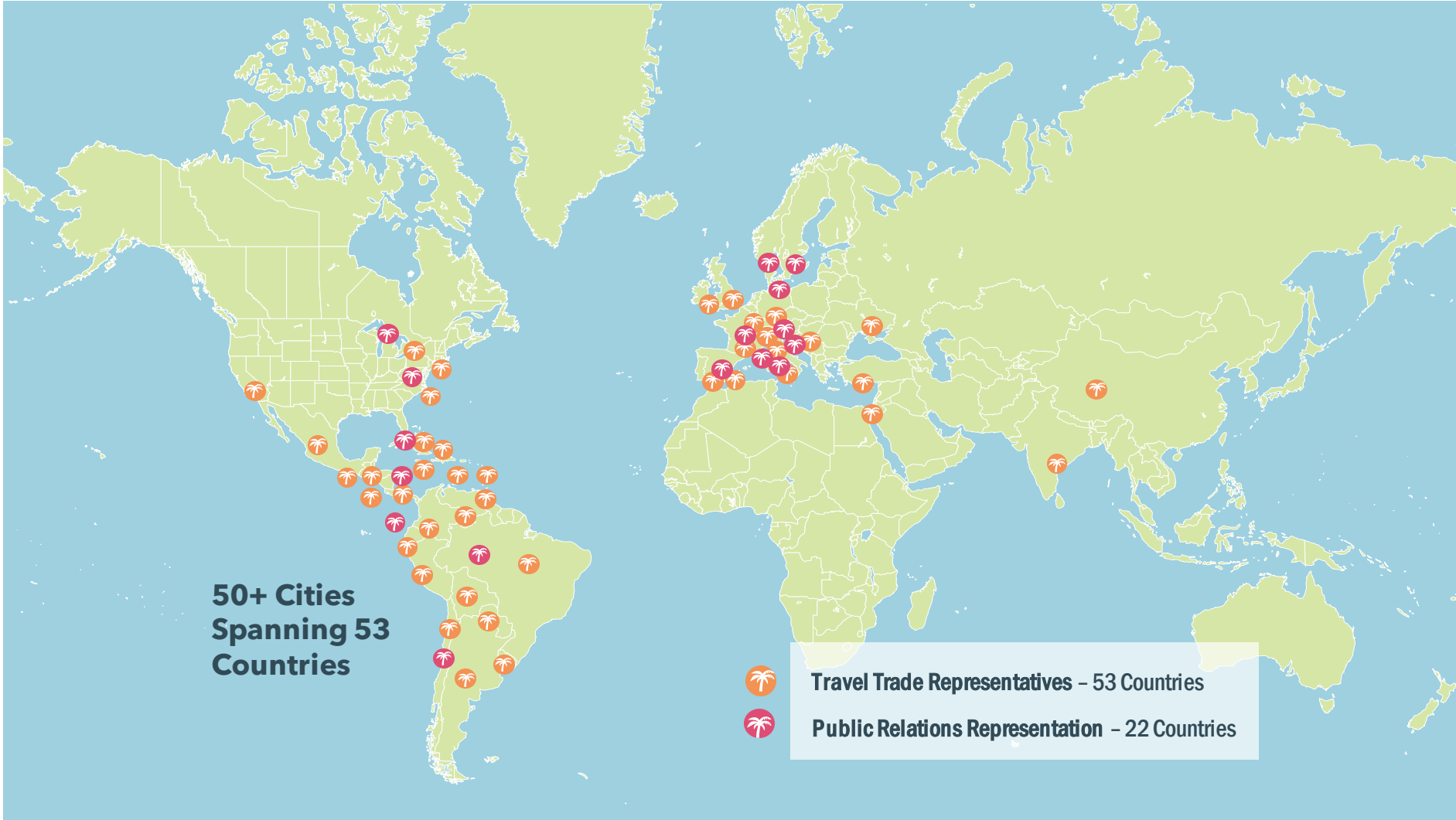
**50+ Cities
Spanning 53
Countries**



Travel Trade Representatives - 53 Countries



Public Relations Representation - 22 Countries



Destination Brand Pillars

Outdoor Oasis

Adventurous Activities
Beach Leisure
Parks & Green Spaces

Cultural Capital

Arts & Performance
Culinary Experiences
Music & Entertainment
Retail Shopping
Tech & Innovation
Sustainability
Accessibility

Rich Heritage

Neighborhoods
History
Architecture & Design

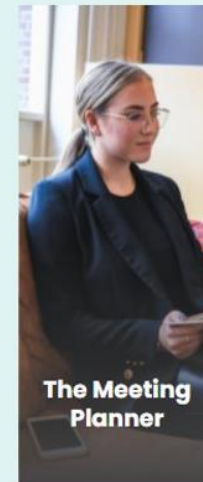
Health & Wellness

Sports
Fitness
Self-Care

Meetings & Events Planner

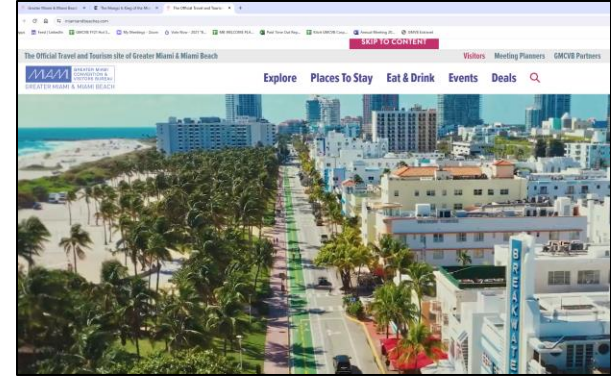
Meetings
Events
Conventions
Conferences

← Diversity, Equity, & Inclusion →



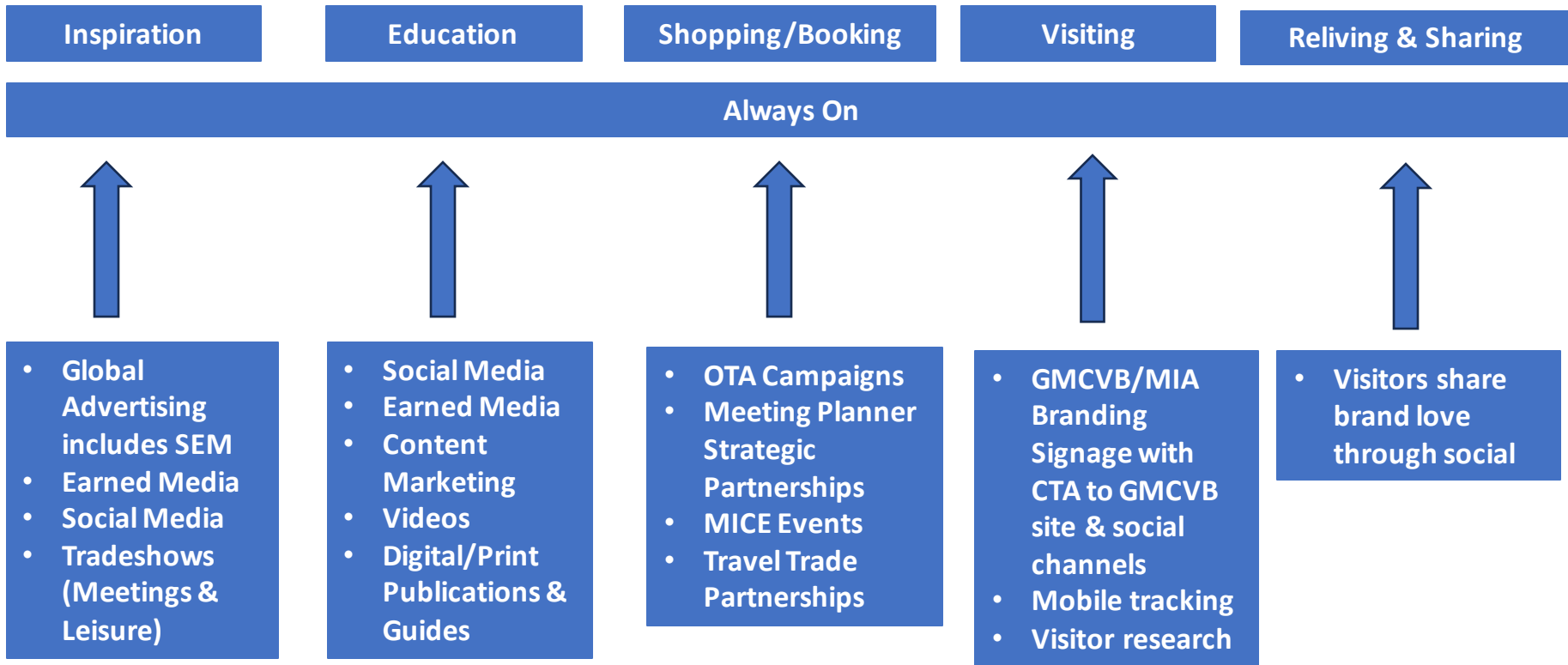
Website & Earned Media Success

- **9.8 million** site visits
- **4.5 million** engagements with partner content
- **27.4 billion** impressions from articles, posts and blogs from 2,000+ media & social influencers
- **\$146 million** in earned media value



GMCVB Marketing Strategy Recap

Initiatives are Aligned with the Traveler Journey





“spavention”



“celovebration”

Living and living life to the fullest while appreciating art and rooftop views in a destination that welcomes everyone. Learn more at miamiandmiami.com



“artventurous”

When exploring vibrant, eye-catching street art inspires you to take an adventure getting lost in the great outdoors. That's my Miami. Learn more at FindYourMiami.com



“vibrantalizing”

FIND YOUR MIAMI
DISCOVER MIAMI BEACH



NEVER A BORED-WALK
MiamiFindYourWave.com

FIND YOUR WAVE
MIAMI BEACH



WARM WEATHER, WARMER WELCOMES
MiamiFindYourWave.com

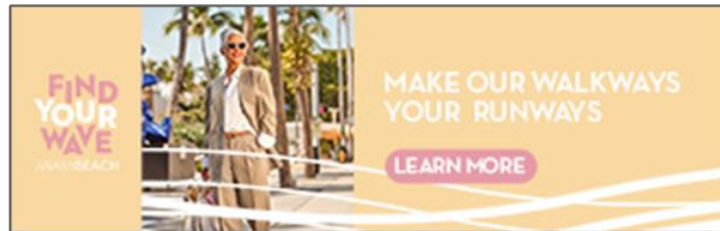
FIND YOUR WAVE
MIAMI BEACH



FIND YOUR WAVE
MIAMI BEACH

SOMETIMES IT'S WHAT'S ON THE OUTSIDE THAT COUNTS

LEARN MORE



FIND YOUR WAVE
MIAMI BEACH

MAKE OUR WALKWAYS YOUR RUNWAYS

LEARN MORE



Keys to Miami's Success

**Foundational
Advantages**

**Diversified
Economy**

**World-Class
Talent**



#1 BEST CITY
FOR BUSINESS
IN LATIN AMERICA

#1 CITY
FOR WOMEN
ENTREPRENEURS

#1 MOST
STARTUP
ACTIVITY

#2 IN THE NATION
FOR TECH JOB
CREATION

#2 HEALTH
DISTRICT IN
THE U.S.

#3 JOB GROWTH IN
FINANCIAL SERVICES IN
THE U.S.

#6 SMALL BUSINESS
ACTIVITY NATIONALLY



Advantages: Global Business Hub

"#1 Market for Foreign Direct Investment"

Financial Times/Nikkei

Established Support for Global Business

- 72 Consulates
- 29 Bi-national Chambers of Commerce
- 22 Foreign Bank Agencies
- #1 US Metro for Foreign-Born population
- 100+ languages spoken





Diversified Economy Thriving Innovation Ecosystem

Higher ED & Tech Commercialization

Our College and Universities are not only producing world-class talent but commercializing research at an increased pace.



Tech Start-Ups & Leaders

Tech business is booming with tech leaders expanding and innovative start-ups being created across key industry verticals.



Incubators, Accelerators & Co-Working Spaces

Local and global accelerators are the basis of our innovation ecosystem.



Investors

Investors from VC to Angel to PE are increasingly making serious moves in Miami. #7 in the nation.





World-Class Talent

**#1 State University System in the US
7 years in a row!

#1 Most Diverse Tech Workforce in US

- Five R1 & R2-ranked Research Universities
- 375,000 College Students in the region
- 2,000+ Finance & Accounting Graduates annually
- 39% increase in individuals with a graduate degree from 2012 to 2023
- #1 US Metro for Foreign-Born population



Supporting our Future Tourism Professionals





MIAMI
FIFA WORLD CUP 2026™
HOST CITY

Art | Basel
Miami Beach



DISCOVER
BOATING™

MIAMI
INTERNATIONAL
BOAT SHOW®



MIAMI GARDENS • FLORIDA
JITG
JAZZ IN THE
GARDENS
Music Fest



MIAMI BEACH LIVE





MIAMI BEACH CONVENTION CENTER



Grand Hyatt Miami Beach Headquarter Hotel

- 800 rooms (50+ suites)
- Four floors of meeting spaces & ballrooms
- Signature restaurant, lobby bar and lounge, and retail shops
- Elevated, climate-controlled, pedestrian skybridge will allow easy movement between the hotel and the Convention Center
- Scheduled to open by year-end 2025



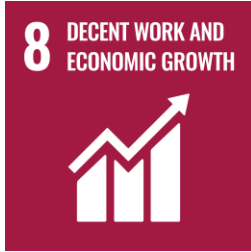


- **Brightline**
- **Bus system**
- **Freebies**
- **Trolleys**
- **Metro Rail**
- **People Mover**



Broadening our Commitment to Sustainability





SDG 8: Foster entrepreneurship and create careers and jobs in tourism, particularly among youth and minorities.



SDG 10: Empower and promote the social and economic inclusion of all irrespective of age, sex, disability, race, ethnicity, origin, religion or economic or other status.



SDG 11: Collaborate with governments to increase environmentally friendly mobility options, making transportation safer and more affordable for all.



SDG 12: Cut food waste in half and substantially reduce all waste through prevention, reduction, recycling and reuse.



SDG 14: Sustainably manage and protect marine and coastal ecosystems and prevent waste or litter that could pollute the marine environment.

Sustainability Road Map



FIU

**Chaplin School of
Hospitality & Tourism
Management**

FLORIDA INTERNATIONAL UNIVERSITY

Online Bachelor of Arts

Global Sustainable Tourism

Chaplin School of Hospitality & Tourism Management



Travelers with Mobility Disabilities

- **96% have experienced an accommodation problem**
- **86% have experienced a flight problem**
- **79% have experienced a transportation problem within a destination**

75%

Of respondents with mobility disabilities have taken a leisure trip in the past 12 months
(Compared to 83% of active leisure travelers**)

3.4

Average # of leisure trips per year
(Compared to 3.0 trips among active leisure travelers*)

Travelers with mobility disabilities invest significantly in travel

They spent an average of

16%

more than active leisure travelers

Travelers with mobility disabilities spent an estimated

\$58.2B

on leisure travel in the past 12 months

wheel the world



Travelers with Autism

- **87%** of parents surveyed do not currently take family vacations
- **93%** would be more likely to travel if autism certified options were available
- **97%** said they are not satisfied with the current travel options for families with autistic individuals
- **98%** responded yes when asked if they look to physicians and therapists for travel approval

*“Traveling to a destination where the staff are trained to recognize and address the needs of children on the autism spectrum simply makes our trip less stressful and more enjoyable... It gives us the freedom to enjoy a vacation in the same way that **‘regular’** families can.”*

Dr. Christopher O’Shea, parent of an autistic child



Autism Certification Partnership



**International Board of Credentialing
and Continuing Education Standards**

Supporting Small Businesses



STRIVE305 Virtual Incubator

Learn on-demand, at home or from any mobile device, and get ready to take your business to the next level.

[TAKE A CLASS](#)

Free Consultation

Receive a free 30-minute consultation for your small business needs. Select a service and date to see available

Small Business Resources

Learn more about small business services, and programs for county certifications and contracting

Strive305 Calendar

Search for events happening all across Miami-Dade County.



MBF Miami Bayside Foundation

SEMINARIO TALLER PARA PEQUEÑAS EMPRESAS

¿LISTO PARA LLEVAR SU NEGOCIO AL SIGUIENTE NIVEL?

Este programa, gratuito, le brindará las herramientas y habilidades necesarias para hacer crecer su negocio, mientras lo guía a través de la creación de su plan de negocios.

APLIQUE AHORA
miamibaysidefoundation.org/workshops

PLAN DE NEGOCIOS
VENTAS
ESTRATEGIA DE MERCADEO
ESTRUCTURA LEGAL
FINANZAS

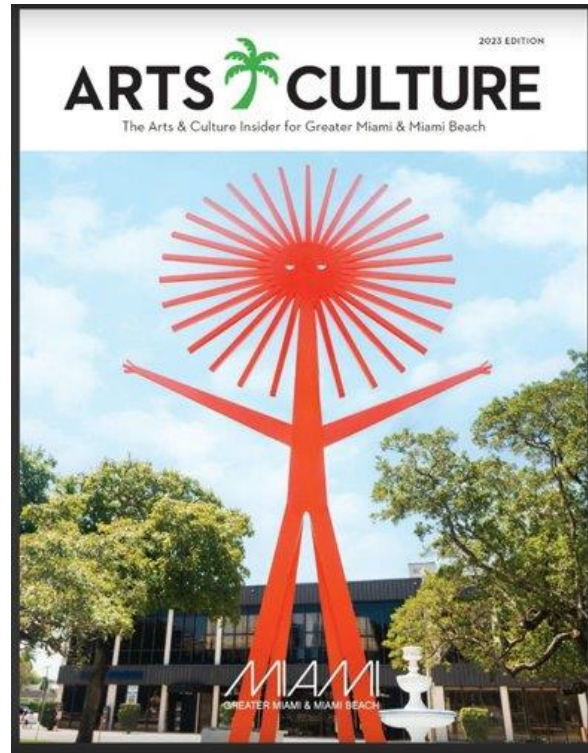
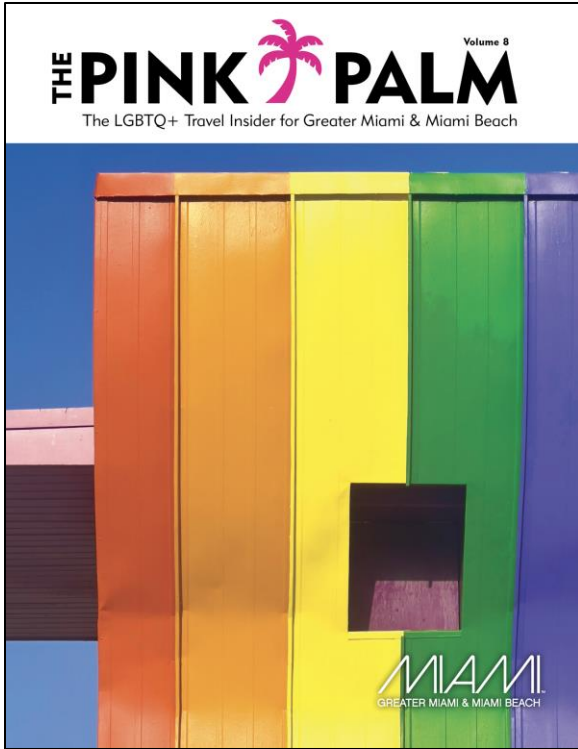
CUÁNDO
15 sesiones: del 4 de abril 2023 al 4 de mayo 2023
Sesiones los martes, miércoles y jueves de 6:00 p.m. a 8:00 p.m.
Graduación: 10 de mayo 2023

DÓNDE
Videollamada por Zoom. No se graban las clases.

REQUISITOS
Empresas operativas por lo menos 6 meses, mínimo 51% de los accionistas deben pertenecer a minorías y estar ubicadas en el condado de Broward, Miami-Dade, o Monroe. Según los estatutos del Estado de Florida, las minorías incluyen Afroamericanos, Hispanos, Asiáticos, Nativos Americanos y Mujeres.

CONTÁCTENOS
AHORA
 (786) 580-5099
 alan@mbf.miami

AUSPICIADORES



Tourism Matters in Miami-Dade County

Making Our Community a Better Place to Live, Work, Play and Visit



How Do Residents Benefit?



181 visitors = 1 job
Miami-Dade County has one of the country's lowest unemployment rates; tourism supports **146,000 jobs.**



Approximately 32% of all state sales taxes in Miami-Dade County are collected from visitors.



Tourism results in **more than \$2,500** in annual tax savings per household in Miami-Dade County. (Visit Florida)



Tourism tax revenues **enhance resident quality of life** and essential services.

**BROUGHT
TO YOU BY
TOURISM**

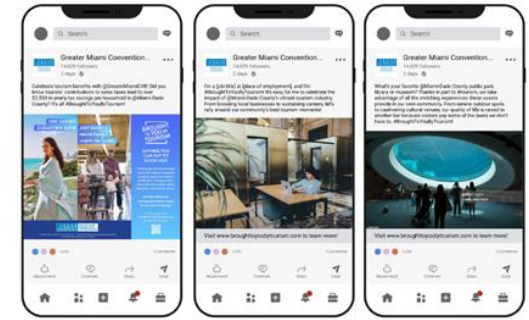
PRESENTED BY THE
GREATER MIAMI CONVENTION & VISITORS BUREAU

**BROUGHT
TO YOU BY
TOURISM**

PRESENTED BY THE
GREATER MIAMI CONVENTION & VISITORS BUREAU

VISION GUIDE

IDEAS FOR SHARING THE POSITIVE IMPACT OF TOURISM



**THEIR BEACH
UMBRELLA RENTAL**

**HELPS METROMOVER
OFFER FREE SERVICE**

Visitors pay tourist and sales taxes that reduce household property taxes and support healthcare, transportation, social services, public safety, education, and arts & culture.

All this makes our community a better place to live, work and play.

To learn more, go to BroughtToYouByTourism.com or scan this QR code.

GREATER MIAMI
CONVENTION &
VISITORS BUREAU

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BROUGHT TO YOU BY TOURISM

Tell Us Your Story

To begin the process of sharing your story, think about asking yourself these questions:

- Can you share a personal story or insightful memory that really highlights the impact of tourism on your life, your family and your community?
- How long have you benefited or been connected to the tourism industry and how has it impacted you, your family, friends or business?
- Which part of Miami-Dade County do you live in?
- How is your business growing and how does tourism lead to an increase in customers for local neighborhood businesses like restaurants, shops, hotels, grocery stores and other places not normally associated with tourism?
- What else would you recommend to find those in our community who will share their stories?

Then, email us your Brought to You by Tourism story using 250 words or less or attach a short video of 60 seconds or so that you would be comfortable sharing via social media at

btybt@gmcbv.com.



BTYBT Pati Vargas

Thank You / Gracias!

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GREATER MIAMI & MIAMI BEACH

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