



# FLORIDA VISITOR ESTIMATES AND TRAVEL INDUSTRY TREND INDICATORS

Released August 15, 2025



# SUMMARY OF VISITOR ESTIMATES AND TRAVEL INDUSTRY INDICATORS



## QUARTER TWO 2025: APRIL - JUNE

### Visitor Estimates:

- > Preliminary estimates indicate that *34.4 million* total visitors (in person-trips) traveled to Florida in the second quarter (Q2) of 2025, a *+0.5%* increase from Q2 2024. Domestic visitors accounted for *91.5%* of the total, while overseas visitors accounted for *6.7%* and Canadian visitors for *1.9%*.
- > Domestic visitation is estimated at *31.5 million* in Q2 2025, a *+0.3%* increase from Q2 2024.
- > The preliminary air/non-air ratio for domestic visitors in Q2 2025 is estimated at *37.7% / 62.3%*, with the share of air visitors declining compared to Q2 2024.
- > Overseas visitation is estimated at *2.3 million* Q2 2025, an *+11.4%* increase from Q2 2024 and down *-6.1%* from Q2 2019.
- > Canadian visitation is estimated at *640 thousand* in Q2 2025, a decrease of *-20.0%* from Q2 2024 and *-24.5%* from Q2 2019.

### Travel Industry Trend Indicators:

- > Total enplanements at 19 Florida airports totaled *28.6 million* in Q2 2025, a decrease of *-2.1%* from Q2 2024. Orlando was the busiest airport in the state with *7.3 million* enplanements (*-2.0%*), followed by Miami with *7.0 million* (*-1.2%*). Punta Gorda (*+22.5%*) and St. Petersburg-Clearwater (*+14.0%*) were the fastest growing airports. Melbourne (*-11.1%*) and Fort Lauderdale (*-10.9%*) saw the most significant declines.
- > Domestic enplanements at 19 Florida airports totaled *23.5 million* in Q2 2025, a decrease of *-1.9%* from Q2 2024. Domestic enplanements accounted for *82.0%* of total enplanements, up from *81.8%* in Q2 2024.
- > Room demand at Florida hotels was up *+1.2%* in Q2 2025 compared to Q2 2024. Occupancy was largely unchanged at *-0.1%*. ADR grew by *+4.3%*.

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

# FLORIDA VISITOR ESTIMATES



## Quarter Two 2025

(April - June)



## Quarter One 2025

## Preliminary Revised

(January - March)

# ESTIMATES OF VISITORS TO FLORIDA

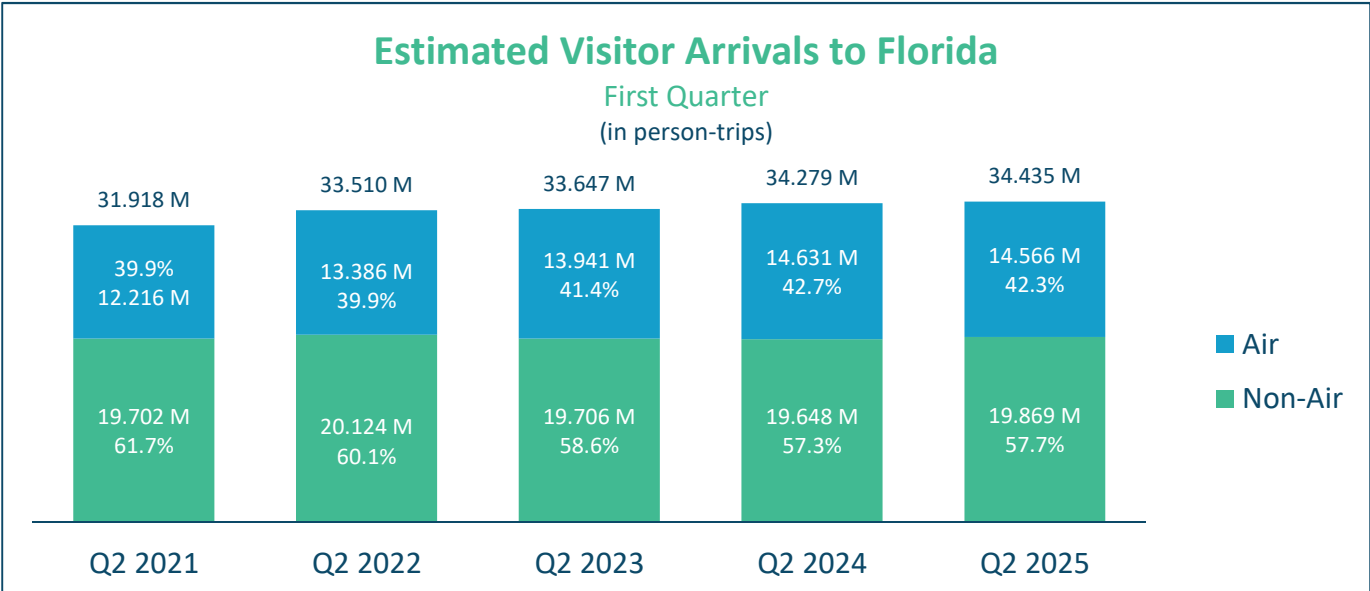


SECOND QUARTER, 2025 (APRIL - JUNE)

PRELIMINARY

in person-trips

		DOMESTIC	OVERSEAS	CANADA	TOTAL	% OF TOTAL
2024	Air	12.097 M	2.059 M	475 K	14.631 M	42.7%
	Non-Air	19.322 M		326 K	19.648 M	57.3%
	Total	31.419 M	2.059 M	801 K	34.279 M	
2025	Air	11.872 M	2.295 M	399 K	14.566 M	42.3%
	Non-Air	19.627 M		242 K	19.869 M	57.7%
	Total	31.499 M	2.295 M	640 K	34.435 M	
% Change '25/'24		0.3%	11.4%	-20.0%	0.5%	



\* 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 August 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 2025 PRELIMINARY REVISED

in person-trips

		DOMESTIC	OVERSEAS	CANADA	TOTAL	% OF TOTAL
Q1	Air	13.502 M *	2.114 M	715 K *	16.331 M *	39.9% *
	Non-Air	24.287 M *		340 K *	24.628 M *	60.1% *
	Total	37.790 M *	2.114 M	1.055 M *	40.959 M *	
	% Change '25/'24	0.0% *	-0.8%	-16.9% *	-0.6% *	
Q2	Air	11.872 M	2.295 M	399 K	14.566 M	42.3%
	Non-Air	19.627 M		242 K	19.869 M	57.7%
	Total	31.499 M	2.295 M	640 K	34.435 M	
	% Change '25/'24	0.3%	11.4%	-20.0%	0.5%	
Q3	Air					
	Non-Air					
	Total					
	% Change '25/'24					
Q4	Air					
	Non-Air					
	Total					
	% Change '25/'24					
CY 2025	Air	25.374 M	4.409 M	1.114 M	30.897 M	41.0%
	Non-Air	43.915 M		582 K	44.497 M	59.0%
	Total	69.289 M	4.409 M	1.696 M	75.394 M	
	% Change '25/'24	0.1%	5.2%	-18.1%	-0.1%	

\* 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 August 15, 2025.

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

# FLORIDA VISITOR ESTIMATES



## Quarter Two 2025

(April - June)



## Quarter One 2025

## Preliminary Revised

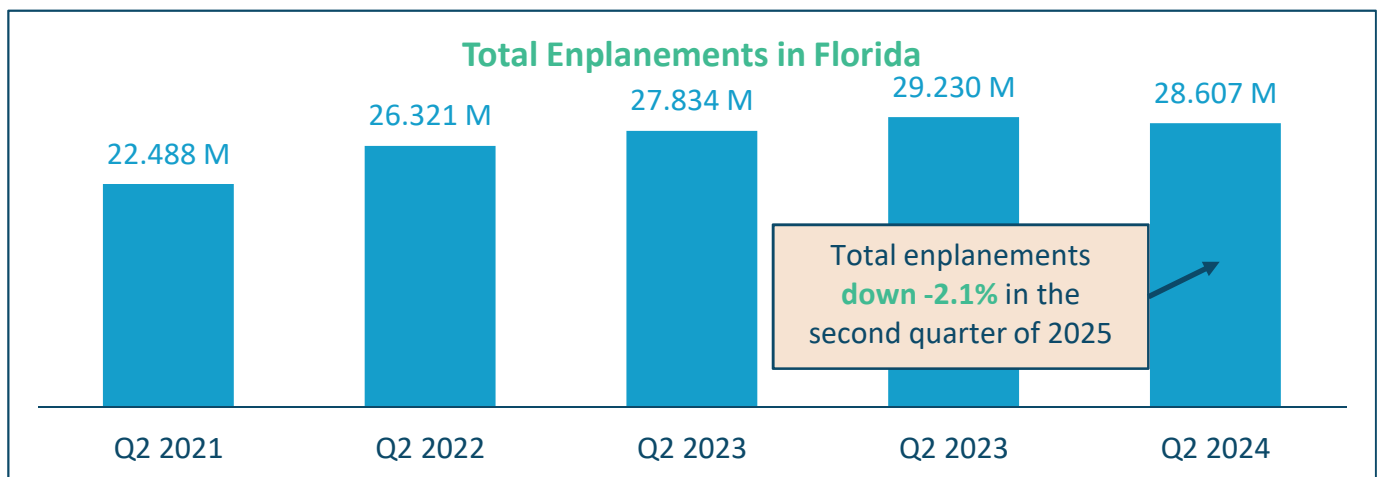
(January - March)

# TOTAL ENPLANEMENTS



## QUARTER TWO 2025 (APRIL - JUNE)

AIRPORT	QUARTER TWO 2024	QUARTER TWO 2025	% CHANGE '25/'24
Daytona	92,803	94,368	1.7%
Destin-Fort Walton Beach	375,638	393,424	4.7%
Fort Lauderdale	4,454,485	3,967,598	-10.9%
Fort Myers	1,413,745	1,427,917	1.0%
Gainesville	78,547	74,762	-4.8%
Jacksonville	1,050,267	1,014,551	-3.4%
Key West	186,659	191,118	2.4%
Melbourne	98,171	87,276	-11.1%
Miami	7,095,203	7,013,444	-1.2%
Orlando International	7,477,733	7,328,637	-2.0%
Orlando Sanford	386,989	431,017	11.4%
Palm Beach	1,088,000	1,099,425	1.1%
Panama City	296,692	308,027	3.8%
Pensacola	438,100	449,704	2.6%
Punta Gorda	239,726	293,629	22.5%
Sarasota	599,857	617,799	3.0%
St. Petersburg-Clearwater	352,154	401,588	14.0%
Tallahassee	124,438	119,329	-4.1%
Tampa	3,380,989	3,293,621	-2.6%
<b>Total</b>	<b>29,230,196</b>	<b>28,607,234</b>	<b>-2.1%</b>



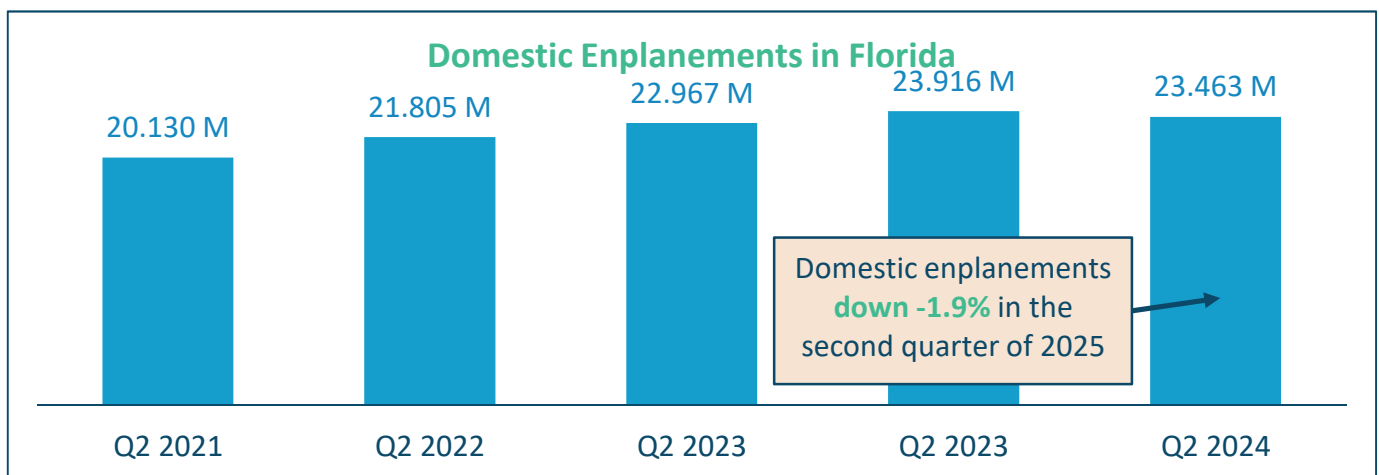
Source: Individual Airports

# DOMESTIC ENPLANEMENTS



## QUARTER TWO 2025 (APRIL - JUNE)

AIRPORT	QUARTER TWO 2024	QUARTER TWO 2025	% CHANGE '25/'24
Daytona	92,803	94,368	1.7%
Destin-Fort Walton Beach	375,638	393,424	4.7%
Fort Lauderdale	3,540,098	3,253,255	-8.1%
Fort Myers	1,377,353	1,395,026	1.3%
Gainesville	78,547	74,762	-4.8%
Jacksonville	1,050,267	1,014,551	-3.4%
Key West	186,659	191,118	2.4%
Melbourne	69,901	67,929	-2.8%
Miami	3,943,209	3,910,330	-0.8%
Orlando International	6,501,610	6,295,058	-3.2%
Orlando Sanford	384,064	430,311	12.0%
Palm Beach	1,079,516	1,091,772	1.1%
Panama City	296,692	308,027	3.8%
Pensacola	438,100	449,704	2.6%
Punta Gorda	239,726	293,629	22.5%
Sarasota	598,410	615,718	2.9%
St. Petersburg-Clearwater	352,154	401,588	14.0%
Tallahassee	124,438	119,329	-4.1%
Tampa	3,186,455	3,062,667	-3.9%
<b>Total</b>	<b>23,915,640</b>	<b>23,462,566</b>	<b>-1.9%</b>



Source: Individual Airports

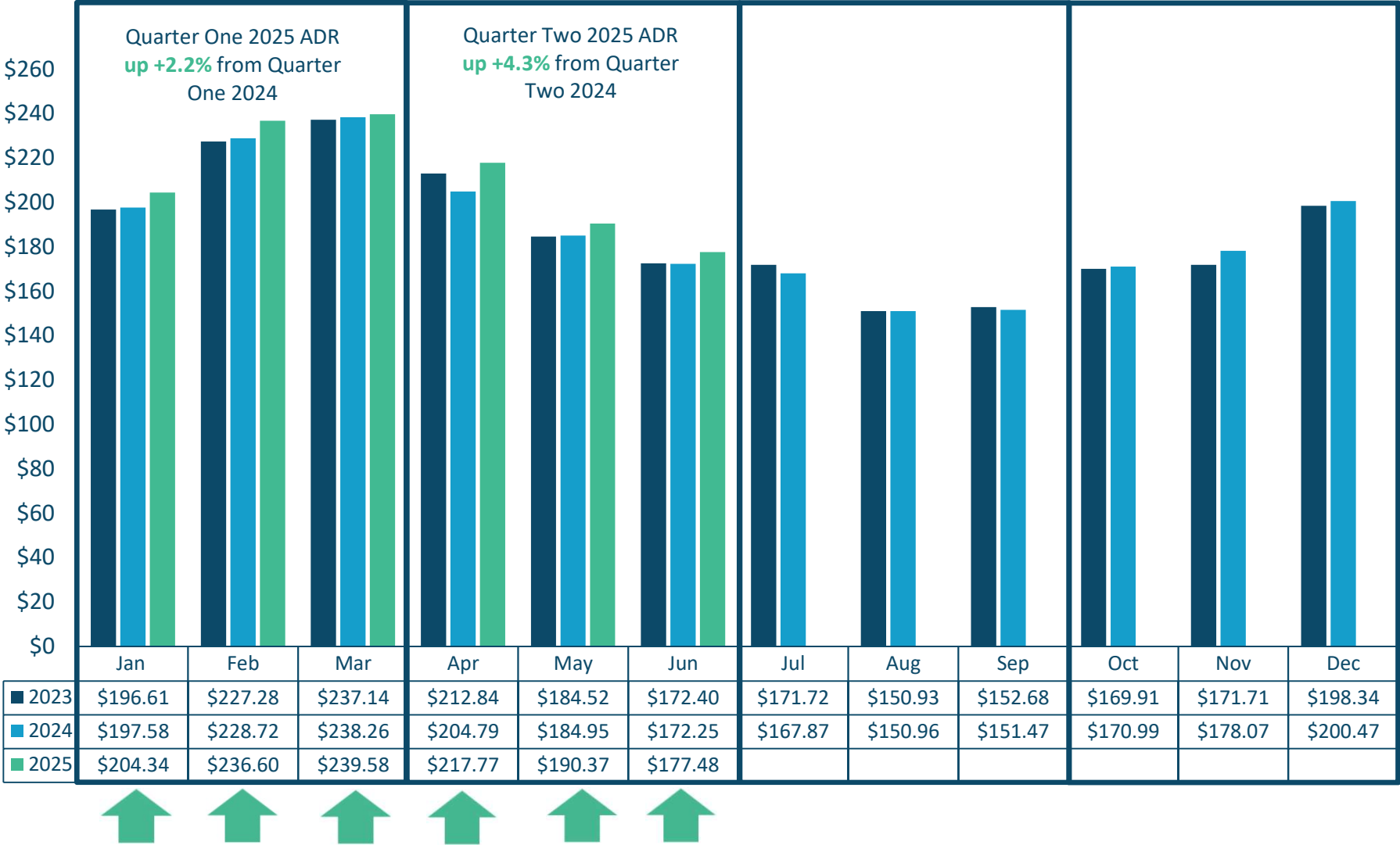


# HOTEL AVERAGE DAILY RATE



CALENDAR YEARS 2023-2025

Year-to-date ADR is **up +3.1%** from same time in 2024



Source: STR

# HOTEL OCCUPANCY RATE



CALENDAR YEARS 2023-2025

Year-to-date occupancy is **up +0.7%** from same time in 2024



Source: STR

# HOTEL ROOM-NIGHTS SOLD (IN MILLIONS)



CALENDAR YEARS 2023-2025

Year-to-date rooms sold are **up +1.8%** from same time in 2024



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.