

# LATIN AMERICA

VISITFLORIDA®  


SPOTLIGHT  
marketing & public relations

# REGION SIZE AND SCOPE



**Latin America –Central and South America and the Caribbean**-8 million square miles of land approximately 19% of the world's population.

- 18 – Spanish speaking
- 1- Portuguese
- 1- Creole

**THE REGION REPRESENTS 50% OF THE TOTAL OVERSEAS TRAVEL TO FLORIDA DURING 2011.**

# TOP ORIGIN COUNTRIES OF OVERSEAS VISITATION TO FL 2011

TOP 10 COUNTRIES	TOTAL VISITATION	% CHANGE
1. Brazil	1,466,000	38%
2. United Kingdom	1,286,000	1%
3. Mexico	387,000	17%
4. Argentina	375,000	39%
5. Venezuela	369,000	37%
6. Germany	341,000	12%
7. France	307,000	23%
8. Colombia	306,000	13%
9. Spain	292,000	18%
10. Japan	246,000	11%

*Peru, Bahamas, Ecuador, Panama and Costa Rica round up the top 20 origin countries of overseas visitation to FL in 2011*

# TOP SPENDING LEVELS

## OF OVERSEAS COUNTRIES WHILE VISITING FL 2011

TOP 10 COUNTRIES	TOTAL	% CHANGE
1. Brazil	\$ 2,242,708,000	50%
2. United Kingdom	\$ 1,008,623,000	1%
3. Venezuela	\$ 366,250,000	43%
4. Mexico	\$ 328,376,000	32%
5. Colombia	\$ 303,481,000	24%
6. France	\$ 302,212,000	29%
7. Germany	\$ 287,214,000	20%
8. Argentina	\$ 278,394,000	61%
9. Australia	\$ 237,645,000	35%
10. Switzerland	\$ 235,483,000	36%

TOTAL OVERSEAS \$10,051,779,000

**LATIN AMERICA TOTAL \$ 4,715,743,000**      **48% increase over previous year**  
*(Bahamas, Peru, Panama, Spain, Ecuador and Honduras round up to the 20 top spending countries)*

# AIRLINE UPDATE

- Volaris Airlines - Direct service Mexico City – Orlando 2X weekly
- InterJet – Direct weekly daily flights Mexico City – Miami
- LAN Colombia started new service between Miami and Bogota with 4 weekly nonstop flights
- LATAM Airlines (Brazil's TAM & Chile's LAN) was formed to create Latin America's largest carrier. The airline operations include Argentina, Chile, Colombia, Ecuador and Peru.
- Brazil's GOL Linhas Aereas launched daily service between its São Paulo hub and Miami with stops in Caracas, Venezuela.
- American Airlines will increase service on its Brasilia and Belo Horizonte routes in Brazil to daily flights and launch new daily service to Manaus, Brazil.
- American Airlines increased its nonstop service between Montevideo and Miami to daily flights.

# FORT LAUDERDALE INTERNATIONAL AIRPORT

## Feb. 2011- 2012

Onboard One Way Passengers		
Central America		
Destination	Airline	Onboards
Guatemala City, GT	Spirit Airlines	26,565
Managua, NI	Spirit Airlines	19,617
Panama City, PA	Spirit Airlines	22,021
San Salvador, SV	Spirit Airlines	11,186
San Pedro Sula, HN	Spirit Airlines	23,423
San Jose, CR	Spirit Airlines	78,055
	<b>TOTAL</b>	<b>180,867</b>
South America		
Destination	Airline	Onboards
Armenia, CO	Spirit Airlines	13,349
Barranquilla, CO	Spirit Airlines	1,353
Bogota, CO	Aires	30,466
Bogota, CO	AVIANCA	46,337
Bogota, CO	Spirit Airlines	49,911
Cartagena, CO	Spirit Airlines	22,614
Lima, PE	Spirit Airlines	15,244
Medellin, CO	Spirit Airlines	36,115
	<b>TOTAL</b>	<b>215,389</b>
	<b>396,256</b>	

## Flights from Latin American – Aug. 2012

Central America		
Destination	Airline	Flts per Month
Guatemala City, GT	Spirit Airlines	17
Managua, NI	Spirit Airlines	17
Panama City, PA	Spirit Airlines	21
San Salvador, SV	Spirit Airlines	13
San Pedro Sula, HN	Spirit Airlines	22
San Jose, CR	Spirit Airlines	51
	<b>TOTAL</b>	<b>141</b>
South America		
Destination	Airline	Flts per Month
Armenia, CO	Spirit Airlines	8
Bogota, CO	AVIANCA	30
Bogota, CO	JetBlue Airways	30
Bogota, CO	Spirit Airlines	29
Cartagena, CO	Spirit Airlines	17
Lima, PE	Spirit Airlines	20
Medellin, CO	Spirit Airlines	22
	<b>TOTAL</b>	<b>156</b>
	<b>297</b>	

**Costa Rica, Colombia, El Salvador, Guatemala, Honduras, Panama, Peru**

# PROFILE OF SOUTH AMERICAN

## TRAVELERS VISITING FLORIDA - 2011

Main Trip Purpose	
Leisure/Recreation/Holiday	74.1%
Visit Friends/Relatives	12.6%
Business/Professional	8.9%
Convention/Conference	1.8%
Other	2.5%

Overall Nights in Destination**	
Average Nights	11.1
Median Nights	8.0

Household Income	
Under \$39,999	30.5%
\$40,000 - \$59,999	17.0%
\$60,000 - \$79,999	11.5%
\$80,000 - \$99,999	6.3%
\$100,000 - \$139,999	13.7%
\$140,000 - \$179,999	6.8%
\$180,000 and over	14.2%
Average HH Income	\$83,800
Median HH Income	\$64,300

Information Sources for Planning**	
Travel Professionals <sup>1</sup>	49.1%
Personal Computer	37.7%
Friends/Relatives	26.0%
Airlines Directly	24.5%
Media <sup>2</sup>	12.2%
Nat'l/State/City Tourism Office	3.2%
Other	2.3%

Top Leisure Activities in Florida**	
Shopping	91.9%
Dining in Restaurants	76.3%
Amusement/Theme Parks	58.8%
Visit Historical Places	34.5%
Sightseeing in Cities	30.6%
Visit Small Towns	20.5%
Art Gallery/Museum	17.8%
Water Sports/Sunbathing	16.5%
Concert/Play/Musical	16.1%
Nightclubs/Dancing	13.4%

Accommodations**	
Hotel/Motel	82.5%
Private Home	22.1%
Other	1.6%

Travel Party Composition	
Traveling without Children	82.5%
One Adult	59.3%
Two Adults	19.1%
Three Adults	2.2%
Four or More Adults	1.9%
Average Adult Party Size	1.4
Median Adult Party Size	1.0
Traveling with Children	17.5%
Average Adult w/Children Party Size	3.6
Median Adult w/Children Party Size	3.0
Average Total Party Size	1.8
Median Total Party Size	1.0

Age of Adult Traveler	
18-24 Years	9.6%
25-34 Years	23.9%
35-44 Years	30.6%
45-54 Years	20.5%
55-64 Years	9.7%
65+ Years	5.6%
Median Age	39.7

Advance Trip Decision	
1 - 30 Days	34.3%
31 - 60 Days	17.6%
61 - 90 Days	12.4%
91 - 120 Days	9.4%
121 - 180 Days	17.5%
More than 180 days	8.6%
Mean Number of Days	95.7
Median Number of Days	60.0

Average Expenditures in U.S.***	
Per Travel Party/Trip	\$4,720
Per Visitor/Trip	\$2,691
Per Visitor/Day	\$150

\*Travelers from South America include those from Argentina, Brazil, Colombia, and Venezuela.

\*\*Multiple responses.

\*\*\*Expenditures in U.S. include airport expenditures.

<sup>1</sup> Travel Professionals include Travel Agency, Tour Companies, and Corporate Travel Departments.

<sup>2</sup> Media includes newspapers/magazines, travel guides, and TV/radio.

Source: U.S. Department of Commerce, ITA, Tourism Industries

# INCOME/INTERNET

2011	BRAZIL	MEXICO	ARGENTINA	COLOMBIA
VISITATION AND RANKING TO FL	1	3	4	5
Volume of visitors to FL	1.4 million	387,000	375,000	306,000
% of increase	38%	17%	39%	13%
POPULATION	203,429,773	113,724,226	41,769,726	44,725,543
INCOME DISTRIBUTION				
A/B	21%	8.46%	7%	10%
C	53%	42%	46%	46%
D/E	25%	49%	47%	44%
INTERNET PENETRATION				
Internet usage	39%	36.70%	67%	55.90%
SOCIAL MEDIA				
Social media audience	43.9 Million	21.0 Million	12.5Million	12.7 Million
Hours spent on social networking	4.6	7	10.7	8.4
Number one site	Facebook	Facebook	Facebook	Facebook



# BRAZILIAN MARKET

- Population approximately 203 million
- The Brazilian middle class has grown by almost **50%** in the last **10** years
  - The Brazilian population that belongs to the **C class** increased from **62.9 million** in 2002 to **90 million** in 2009 and is estimated to reach **115 million** in 2014
- The **A/B** classes have reached a total of **30** million people

Many new projects are already being developed, and many more are being projected for the coming years, thus bringing a great amount of **international investment** to Brazil. As a result, it is expected that by increasing the number of jobs, it will also **increases the Brazilian population's purchasing power**

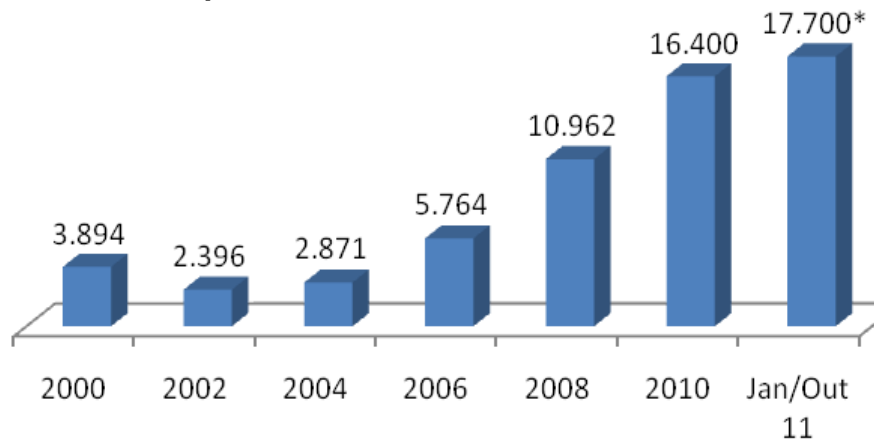


# PROFILE

## BRAZILIAN TRAVELER

- Brazilians spent US\$16.4 billion abroad in 2010. More than tripling the 2005 total of \$ 4.72 billion
- In 6 years, **expenditure abroad by Brazilians increased by 340%**
- In the first ten months of 2011, Brazilian spending abroad reached \$ 17.7 billion
- If we compare figures from January-October 2010 to the same time period for 2011, Brazilian spending is already 34.9% higher.

**Brazilian expenditure abroad 2000-2011**



\* To October 2011

# BRAZILIAN LUXURY MARKET OVERVIEW

The Brazilian luxury market moved over **\$5 BILLION last year**, which is the equivalent to 1% of the revenue of the worldwide commerce. Part of this performance is due to the access to sophisticated items by the Brazilian middle class.

- São Paulo is the leading city in luxury consumption accounting for **62%** of this market.

The luxury consumption in Brazil is no longer just a symbol of social status but it also shows a sign of development, personal evolution and personal choice.

- This consumption goes beyond the mere acquisition of jewelry, clothes or luxury cars and it's not only connected to price but also to exclusivity, quality of life and pleasure.

# LUXURY AUDIENCE WHO ARE THEY?

The consumption of this audience is concentrated in the southeast of Brazil, with a special focus on São Paulo and Rio de Janeiro. These people :

## Consumption

- can not imagine living without a credit card
- like to buy designer clothes
- prefer products that offer the latest technology
- are always the first ones to try new products / services



## Family and Work

- feel confident enough to open their own company
- are well recognized as economically successful
- think that women should work



## Activities

- cannot imagine living without internet
- keep up with their periodic medical examinations
- travel to places they already know
- maintain a healthy / balanced lifestyle

# IMPORTANCE OF THE TRAVEL TRADE

- Travel agencies – 9,000 travel agencies; 3,500 are members of ABAV in charge of 70 % of sales
- Tour Operators – up to 400; BRAZTOA has 83 members that respond for 80% of travel package sales
- Even though Internet usage in Brazil is among the highest in Latin America, people still prefer booking travel through their travel agent.

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## Morgans Group busca fidelizar mercado brasileiro nas unidades de Miami

Por: Lella Melo



Mari Hasegawa, de S&P, apresenta publicações às Morgans Hotel Group

De estilo boutique e com conceito de serviço diferenciado, o Morgans Hotel Group quer ampliar a presença de brasileiros em suas empreendeduras situadas em Miami (Estados Unidos). A rede conta com três unidades na cidade americana - Delano Hotel, Shore Club e Mondrian. "Oferecemos um conceito de hospedagem contemporânea e uma experiência gastronômica forte. Podemos dizer que somos os hotéis mais chiques de Miami. Atendemos um público que busca produtos exclusivos", afirma Doug Carillo, diretor regional de Marketing do Morgans Hotel Group, em visita nesta segunda-feira (20/10) à sede do MERCADO&EVENTOS / FOLHA DO TURISMO em São Paulo. Ele estava acompanhado por Paul Leivas, da Spotlight Marketing e dos representantes da rede no Brasil, Claudio Lobo e Mariana Haddad, da Vivof Propriedades. A diretora geral do M&E, Mari Hasegawa, recebeu os executivos.

De acordo com Carillo, o turista brasileiro é o terceiro maior hóspede internacional para as hotéis do grupo em Miami. "Para todos nossos clientes disponibilizamos um programa de compras em lojas de marcas famosas. Temos desconto para todos os tipos de produtos", declarou o diretor, lembrando que aqueles hóspedes que fizerem as reservas de última antecedência pelo website do grupo ganham 15% de desconto no valor total. A rede mantém ainda parcerias com as operadoras e agências de viagens brasileiras e retém a elaborar uma versão no idioma português de seu website para atender a esse mercado. "O brasileiro é tão importante que realizamos na semana passada um festival de música eletrônica à beira da piscina do Mondrian Hotel com seu DJ brasileiro", comentou Carillo.

Entre os novos serviços, o executivo destacou a inauguração de um novo restaurante em janeiro passado no Delano Hotel. O local denominado "Ristor" é desenhado para a gastronomia italiana com ênfase na alta capacidade para servir 180 pessoas. O espaço oferece refeições no almoço e jantar. "Também abrimos em fevereiro dentro uma área de discoteca no Delano Hotel. Temos várias opções para o nosso hóspede aproveitar a vida noturna de Miami", complementou Paul Leivas, diretor da Spotlight Marketing. O Delano Hotel conta com 194 apartamentos, sendo oito bônus exclusivos, e é voltado para as famílias. O ShoreClub, por sua vez, está mais focado no público jovem. Inspirado na cultura indiana, o empreendimento tem 308 quartos e oito bangalôs.

Projetado por um profissional holandês, o Mondrian Hotel traz um estilo diferente para cada apartamento. "Os 245 quartos são decorados

**PLANTÃO DE NOTÍCIAS**

Eventos: 05:04 - 05:30  
 Lica mostra estatísticas de câmbio de eventos na 3ª edição do GMI

Parques: 05:04 - 19:38  
 Parque Nacional de Iguazú recebeu 424.530 de visitantes no Imaresat

Serviço: 05:04 - 19:38  
 Tui Travel P&C adquire o Bazaar Marketplace Performance Toolbox

Eventos: 05:04 - 19:12  
 Travelweek São Paulo terá mais de 2 mil participantes

Estados: 05:04 - 19:32  
 Paul busca apoio para a promoção internacional de voos fretados

Créditos: 05:04 - 19:30  
 Temporada brasileira de cruzeiros marítimos está em sua 6ª fase

Eventos: 05:04 - 19:48  
 Jura Filho se reúne com deputados estaduais de Tocantins

Serviços: 05:04 - 19:30  
 Curitiba ganha novo estádio "Turano & Osburn"

História: 05:04 - 19:30  
 Brasil terá nova patrocinadora de futebol do Botafogo - Casa de Espalho

Cruzeiros: 05:04 - 19:30

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# MISSIONS AND TRADE SHOWS 2012-2013

Program	Dates	Location
<u>La Cumbre</u>	September 5 -7 , 2012	Orlando, FL
Sales Mission to Peru & Ecuador	September 24 – 28, 2012	Lima, Peru & Quito/Guayaquil, Ecuador
ABAV Brazil	October 24 - 26, 2012	Rio de Janeiro, Brazil
FIT Argentina	November 3 - 6, 2012	Buenos Aires, Argentina
Sales Mission to Spain	January 14 - 18, 2012	Madrid & Barcelona, Spain
ANATO Colombia	February, 2013	Bogota, Colombia
Florida Select	March, 2013	Mexico
World Travel Market Latin America	April 23 - 25, 2013	Sao Paulo, Brazil
Venezuela Sales Mission	April, 2013	Caracas, Venezuela

Contact Denise Arencibia, Director of Latin America at VISIT FLORIDA, for more information:  
[darencibia@visitflorida.org](mailto:darencibia@visitflorida.org) or (850) 205-3866

# VISIT FLORIDA COOP PROGRAMS

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VISIT FLORIDA has designed coop programs to maintain and grow top of mind awareness and in turn stimulate travel throughout Florida – beyond the two gateways – for Latin America. Reaching both consumers and travel trade.

Programs with publications such as Panrotas, Report Americas, Ladevi, ClickHotels.com, Turistampa, etc.

For more information contact Amy Rodriguez, The Rodriguez Group (305) 661-6969 or [amy@therodriguezgroup.net](mailto:amy@therodriguezgroup.net)



THE RODRIGUEZ GROUP

# PANROTAS

- PANROTAS Editora is one of Brazil's leading publishing companies. Committed to promoting the travel industry for more than 30 years, they reach the vast Brazilian travel market with their publications, electronic newsletter, website banners and e-broadcasts.
- **Jornal PANROTAS:**
- **Frequency:** weekly
- **Circulation:** 5,000 issues

Jornal PANROTAS delivers sharp up to the minute information. Written in simple and informal language, it presents the main issues of the tourism industry from the point of view of respected professionals. Among its readers are the executives of travel agencies, tour operators, hotels, airlines, auto rental companies, suppliers and official tourism organizations. Jornal PANROTAS is exceptionally informative to its readers and uniquely effective for its advertisers.

VISIT FLORIDA has a co-op program that is sure to meet your needs!



# VISIT FLORIDA

## VACATION GUIDE



Reach both consumers and the trade throughout Latin America. The Latin American Vacation Guide has been completely redesigned to effectively target the second largest international market to Florida.

The Guide will be published one side in Spanish and the other side in Portuguese. Editorials and theme are written by journalist from Latin America tailored to their markets.

CIRCULATION: 30,000

ISSUE DATE: January 2013

SPACE DEADLINE: October 1, 2012

MATERIALS DEADLINE: November 1, 2012

**34 Partners** participated in the bilingual vacation guide this year!

Thank you! Muito O'brigada! ¡Gracias!



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