

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

THE REGION REPRESENTS 50% OF THE TOTAL OVERSEAS TRAVEL TO FLORIDA DURING 2012.

INTERNATIONAL VISITOR VOLUME

COMBINED BUSINESS AND LEISURE TRAVEL

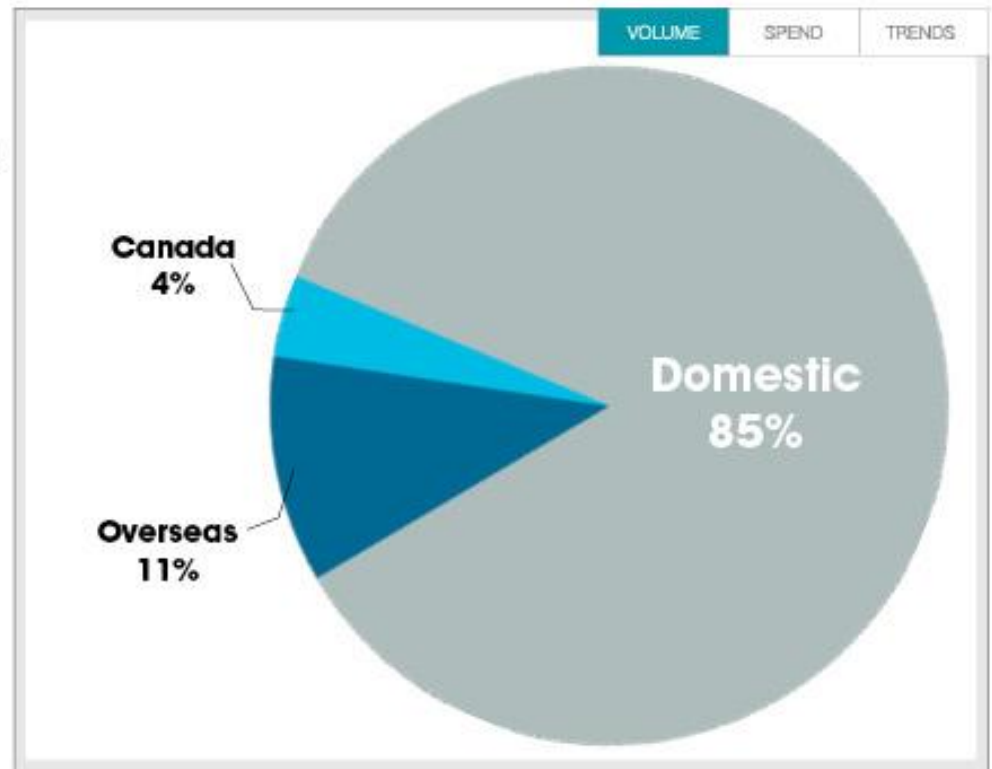
Note: Because 2012 visitor numbers are finalized mid-year, preliminary numbers are used for this report.

Canadian numbers are provided by Statistics Canada by quarter. The Canadian 2012 estimate was derived using preliminary data obtained from Statistics Canada. 2012 appears to be another record year for Canadian visitation to the Sunshine State.

Source: VISIT FLORIDA

IMPORTANCE OF THE INTERNATIONAL MARKET

International visitors play an increasingly important role for Florida tourism. During times when domestic visitation has stayed relatively flat due to economic challenges, international numbers have increased, attracted by a devalued U.S. dollar, to represent a bigger portion of Florida's total visitor volume. In 2012, Florida hosted more than 10.2 million overseas



visitors, a 9 percent increase over the previous year. Canadian visitors to Florida also increased by 9 percent accounting for 3.6 million visits to the Sunshine State. These increases represent record highs for overseas and Canadian visitation to Florida.

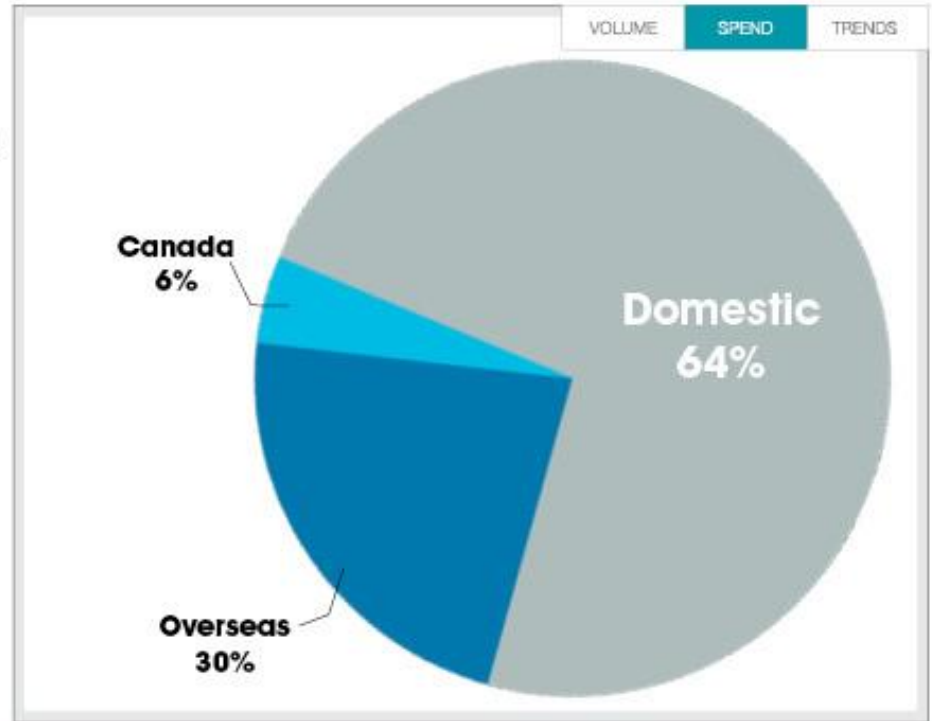
INTERNATIONAL VISITOR SPEND

COMBINED BUSINESS AND LEISURE TRAVEL

Note: Because 2012 visitor numbers are finalized mid-year, preliminary numbers are used for this report.

Canadian numbers are provided by Statistics Canada by quarter. The Canadian 2012 estimate was derived using preliminary data obtained from Statistics Canada. 2012 appears to be another record year for Canadian visitation to the Sunshine State.

Source: VISIT FLORIDA



IMPORTANCE

OF THE INTERNATIONAL MARKET

International visitors traditionally stay longer because they have, in some cases, annual leave ranging from four to six weeks. Spend is reflected proportionally. The variety and reasonable cost of goods sold in

the U.S. is a huge drawing card that attracts these consumers. Florida's overseas and Canadian visitors spent almost \$15 billion in 2012 – a 10 percent increase year over year.

OVERVIEW

Growth markets are those countries from which Florida is seeing strong current and projected future visitation. Representing 29 percent of international visitation, this area has the greatest potential for growth during the next year. Accessibility has increased tremendously, with both U.S. carriers and in-country airlines adding flights to Florida.

In-country industry partnerships are currently good and with continued focus, strides can be made to extend Florida's awareness, engagement and conversion to potential visitors.

Growth markets include: Mexico and South American countries. Argentina, Brazil, Colombia, Mexico and Venezuela rise to the top of this market segment.

2012 LONG-HAUL TRAVEL

- In general, Latin American countries have a comparably young population with approximately 50 percent under the age of 30.
- Latin American travelers tend to be high spenders on vacation and expect value (quality) for their money.
- At least 60 percent of visitors to the U.S. from Mexico and Venezuela come to visit friends and relatives.
- Business travel to the U.S. is highest from Colombia and Chile.
- Visitors from Argentina and Brazil travel to the U.S. predominately for leisure.

Long-haul travelers take trips that, point to point, require multiple days in a car or 7 hours or more in a plane.

GROWTH MARKETS AS A PERCENTAGE OF INTERNATIONAL VOLUME AND SPEND

This table shows the volume and spending contribution of different growth market countries to Florida's total international visitor volume and spending numbers. Growth markets comprise 29 percent of Florida's international visitors and 31 percent of spending by international visitors.

Country	Volume	International Percent	Spend	International Percent
Other	536,000	4%	\$700,000,000	5%
Colombia	369,000	3%	\$514,500,000	3%
Mexico	418,000	3%	\$379,800,000	3%
Venezuela	451,000	3%	\$389,500,000	3%
Argentina	603,000	4%	\$495,400,000	3%
Brazil	1,600,000	12%	\$2,159,700,000	14%
Total Florida	3,977,000	29%	\$4,638,900,000	31%

Total Florida

Country	Volume	International Percent	Spend	International Percent
Other	536,000	4%	\$700,000,000	5%
Colombia	369,000	3%	\$514,500,000	3%
Mexico	418,000	3%	\$379,800,000	3%
Venezuela	451,000	3%	\$389,500,000	3%
Argentina	603,000	4%	\$495,400,000	3%
Brazil	1,600,000	12%	\$2,159,700,000	14%

Growth Market

	Volume	International Percent	Spend	International Percent
Growth Markets	3,977,000	29%	\$4,638,900,000	31%
Brazil	1,600,000	12%	\$2,159,700,000	14%
Argentina	603,000	4%	\$495,400,000	3%
Venezuela	451,000	3%	\$389,500,000	3%
Mexico	418,000	3%	\$379,800,000	3%
Colombia	369,000	3%	\$514,500,000	3%
Other	536,000	4%	\$700,000,000	5%

Note: estimates are preliminary and subject to change

Overseas spending estimates reflect face-to-face card transactions and cash withdrawn in Florida, not transactions made overseas or online.

Source: Overseas estimates are extrapolated from aggregate card usage data provided by Visa/Vue® Travel for 2012 and incorporate data from other independent research sources.

Top Overseas for Visitation to Florida

Calendar Year 2012

No.	Origin Country	Visitation %	Change
1	Brazil	1,600,000	11%
2	United Kingdom	1,583,000	2%
3	Argentina	603,000	64%
4	Venezuela	451,000	25%
5	México	418,000	9%
6	Colombia	369,000	23%
7	Germany	346,000	7%
8	France	290,000	0%
9	Australia	278,000	8%
10	Japan	276,000	4%
11	Spain	249,000	12%
12	China	230,000	51%
13	Peru	196,000	8%
14	Italy	170,000	10%
15	Sweden	170,000	5%

Source: VisaVue 2012

Top Overseas for Spending to Florida

Calendar Year 2012

No.	Origin Country	Visitation %	Change
1	Brazil	\$2,159,700,000	5%
2	United Kingdom	994,200,000	-4%
3	Colombia	514,500,000	32%
4	Argentina	495,400,000	111%
5	Bahamas	390,000,000	6%
6	Venezuela	389,500,000	29%
7	Mexico	379,800,000	7%
8	Peru	340,800,000	10%
9	Germany	256,500,000	5%
10	France	215,500,000	-3%
11	Switzerland	212,400,000	11%
12	Australia	205,700,000	10%
13	Panamá	202,500,000	18%
14	China	177,200,000	65%
15	Honduras	173,300,000	1%

Source: VisaVue 2012

AIRLINE UPDATE

- Copa flight will start new operations on December 16, four times a week, via Panama to Tampa, connecting Latin America to the West Coast
- 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.
- Tam confirmed the operations of the flight from Belem (Brazil) to Miami starting February 2014.
- 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. In October AA launched the new operation linking the Brazilian cities of Curitiba and Porto Alegre to Miami.

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
	TOTAL	180,867
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
	TOTAL	215,389
	396,256	

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
	TOTAL	141
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
	TOTAL	156
	297	

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

PROFILE OF SOUTH AMERICAN

TRAVELERS VISITING FLORIDA - 2012

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 ¹	49.1%
Personal Computer	37.7%
Friends/Relatives	26.0%
Airlines Directly	24.5%
Media ²	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	
<i>Traveling without Children</i>	
One Adult	82.5%
Two Adults	59.3%
Three Adults	19.1%
Four or More Adults	2.2%
Average Adult Party Size	1.9%
Median Adult Party Size	1.4
<i>Traveling with Children</i>	
Average Adult w/Children Party Size	17.5%
Median Adult w/Children Party Size	3.6
Average Total Party Size	3.0
Median Total Party Size	1.8
	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.

¹ Travel Professionals include Travel Agency, Tour Companies, and Corporate Travel Departments.

² 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**



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.

Morgans Hotel busca fidelizar mercado brasileiro nas unidades de Miami

Por: Lella Melo



Mari Hingray, 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 empreendimentos situados 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 (26/10) à sede do MERCADO&EVENTOS / FOLHA DO TURISMO em São Paulo. Ele estava acompanhado por Paula Lewis, da Spotlight Marketing e das representantes da rede no Brasil, Claudia Lobo e Mariana Haddad, da Vivof Propaganda. A diretora geral do M&E, Mari Hingray, recebeu os executivos.

De acordo com Carillo, o turista brasileiro é o terceiro maior hóspede internacional para os hotéis de 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 pretende 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 Djs 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 "Racco" é inspirado pela gastronomia italiana com ênfase na e tem capacidade para servir 180 pessoas. O espaço oferece refeições no almoço e jantar. "Também abrimos em fevereiro outra nova área de recreação no Delano Hotel. Temos várias opções para o nosso hóspede aproveitar a vida noturna de Miami", complementou Paula Lewis, diretora 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: 0304 - 19:30
 Guia mesa estatísticas de câmbio de eventos na 3ª edição de GMI

Parques: 0304 - 19:30
 Parque Nacional de Iguazú recebe 424.530 de visitantes no trimestre

Serviço: 0304 - 19:30
 Tui Travel P&C adquire o Boreas Performance Performance Toolbox

Eventos: 0304 - 19:12
 Travelweek São Paulo terá mais de 2 mil participantes

Estados: 0304 - 19:02
 Paul busca apoio para a promoção internacional de voos fretados

CREATIVAS: 0304 - 19:00
 Temporada brasileira de cruzeiros marítimos está em sua 6ª fase

Eventos: 0304 - 18:48
 Jura Filho se reúne com deputados estaduais de Tocantins

Serviço: 0304 - 18:30
 Curitiba ganha novo estádio "Turano & Osburn"

HISTÓRIA: 0304 - 18:30
 Brasil: é nova patrocinadora de futebol do Botafogo - Casa de Espalho

CRUIZEIROS: 0304 - 18:30

© Copyright 2009 - BrasilTuris by Domineo.com

VISITFLORIDA®

Program	Dates	Location	Estimated Cost: CVB Theme Parks	Estimated Cost: Hotels Shopping Misc	Description
SALES MISSION CENTRAL AMERICA		Panama, Costa Rica, Jun-14 Guatemala	\$2,500	\$2,000	Interactive presentations/workshops to travel trade in 3 cities
ABAV - Feiras das Americas	9/4- 8/2013	Sao Paulo, Brazil	\$5,500	\$5,000	Counter area with signage/branding for CVB. Custom space also available.
ABAV - VIP Event	9/4/2013	Sao Paulo, Brazil	\$1,000	\$250	VIP Event to trade with Consumer Promotional component. \$1000 Sponsors/\$250 for participation only
ANATO	2/TBD/ 2014	Bogota, Colombia	\$3,000	\$2,600	Counter area with signage/branding for CVB. Custom space also available.
SALES MISSION CHILE, ARGENTINA, URUGUAY		Chile, Argentina, May-14 Uruguay	\$3,000	\$2,500	Interactive presentations/workshops to travel trade in 3 cities
WORLD TRAVEL MARKET _ LATIN AMERICA	4/TBD/20 14	Sao Paulo, Brazil	\$5,500	\$5,000	Counter area with signage/branding for CVB. Custom space also available.
SALES MISSION TO MEXICO	5/TBD/ 2014	Mexico City, Mexico	\$2,500	\$2,000	Interactive presentations/workshops to travel trade with a promotional consumer component
E-LEARNING SPECIALIST PROGRAM	Annual	All LATAM	\$2,000	\$800	E-Learning specialization program for all travel trade in all markets with customized destinational chapters and featuring individualized product education for Hotels, Attractions and Shopping.

VISIT FLORIDA COOP PROGRAMS

Vuela más allá de las nubes y ateriza en un paraíso tropical. No esperes. Descubre tu vida Florida ahora mismo en VISITFLORIDA.com/español.

VISITFLORIDA

Goza
tu vida **FLORIDA**

DOLEAR
RENT A CAR

Disfruta
tu vida **FLORIDA**

VIAJA A LA FLORIDA
3 x 1 millas abonadas de American Airlines

VISITFLORIDA

Disfruta
tu vida **FLORIDA**

¡Reserva Ahora!

VISITFLORIDA

Clickhoteles
CO MULTIMEDIA

011 5353 3800
info@clickhoteles.com

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



THE RODRIGUEZ GROUP

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 2014

SPACE DEADLINE: November 1, 2013

MATERIALS DEADLINE: November 30, 2013

34 Partners participated in the bilingual vacation guide this year!

Thank you! Muito O'brigada! ¡Gracias!



For more information: info@spotlight-marketing.com