



International Consumer Profiles United Kingdom and Ireland



These price-savvy consumers range from young singles to boomers, with young families with children being the most important market. The travel decisions 229 days before their trip and book their flight 202 days ahead. The destination choice is most strongly influenced by travel booking websites and review websites. The two types of consumers are first-time visitors looking for value and repeat visitors seeking exclusivity.

Type of Accommodation:

	U.K.	Canada	Mexico	Colombia	Brazil
Hotel	87.3%	84.9%	86.3%	55.5%	73.0%
Vacation Homes	10.6%	14.0%	12.1%	41.1%	24.5%
Other	5.6%	1.9%	2.2%	4.7%	4.4%

Source: SIAT Inbound Survey Monitor

Major Takeaways:

- Children are heavy influencers of travel destinations.
- Average group size is 2.6.
- Average age is 43 years old.
- Length of stay is 10 nights for hotels and 14 nights for vacation homes.
- 27.1% of visitors are solo travelers and 28% have a party of 4 or more people.
- 67% book with airlines directly, 35% follow personal recommendations, 26% consult local travel agencies and 26% OTAs.
- Enjoy experiences that have been endorsed by celebrities or personalities.
- Prefer image-led advertisements depicting lifestyles and vacation styles similar to their own.
- Activities that resonate with this market are shopping (88%), sightseeing (76%), and theme parks (87%).

Socioeconomics:

- The ordinary wealth elite class, who constitute the top 6% of the population by wealth had an average income of \$112,299 USD.
- Households within the second quartile had an average disposable income of approximately \$40,755 USD.
- Median income for retired households is \$32,680 USD.

Opportunities:

- Florida holds the third spot as a favored US destination.
- The top three factors that influenced the most recent destination choice for Brits were transportation (accessibility), low cost, and cultural and historical sites.
- Budget-savvy travelers are on the rise in the UK.
- 67% of consumers use airlines for trip planning purposes, 34% rely on personal recommendations, and 25% on OTAs.
- Average spending per travel party is \$4,067.
- Favorite holiday types for British visitors include city breaks, combined relaxing and sightseeing/activity holidays, and beach holidays.

Travel Information:

- 39 direct flights per week from UK cities to MCO (2023).
- Access to regional or direct flights to U.S. is a major decision maker for consumers across the UK and Ireland.
- London (60% of passengers) and Manchester (30%) are the main origin markets.
- July, August, and October are the busiest travel months.



International Consumer Profiles Canada



Consumers range from young singles to boomers. Only 5% visit the US for the first time. 48% of travelers search 90 days or more before traveling. Booking windows have decreased from 150 days in 2021 to 121 days in 2023. These consumers are not heavy users of social media for booking their vacations. Canadians prefer booking through airlines, online travel agencies and personal recommendations over tour operators and travel agents. Majority of Canadians (42%) travel with family. 88.4% travel for the sole purpose of vacationing.

Type of Accommodation:

	U.K.	Canada	Mexico	Colombia	Brazil
Hotel	87.3%	84.9%	86.3%	55.5%	73.0%
Vacation Homes	10.6%	14.0%	12.1%	41.1%	24.5%
Other	5.6%	1.9%	2.2%	4.7%	4.4%

Source: SIAT Inbound Survey Monitor

Major Takeaways:

- Among the social media channels, most media channels used for planning are Instagram, YouTube, and Facebook.
- Highest consumer spending are for theme park visits (72%), shopping (70%), and sightseeing (52.6%).
- Prefer image-led advertisements depicting family memories, outdoor experiences and emotional connections.
- In addition to planning for travel to the U.S., they consider travel to Europe and Central America & Caribbean.

Opportunities:

- Florida holds the second spot as a favored destination in the US for Canadian visitors.
- Main planning sources are websites via computer (44%) and personal recommendations from friends/family (29%).
- Travel motivators for international travel include having fun, relaxing, spending time with family and satisfying a sense of adventures.
- The most common websites consulted for selecting a destination are travel booking websites (OTAs) (56%) and review websites (48%).
- The number of direct flights to MCO has surpassed pre-pandemic levels.

Socioeconomics:

- Median household after-tax income (HHI) is \$50,050 USD.
- Senior families (65+) have slightly higher incomes, at \$51,607 USD.
- For couples with children, the median HHI is \$83,222 USD.
- 19% of the population is aged 65 or older.

Travel Information:

- Average length of stay is 8 nights.
- Winter stays tend to be longer than spring and summer trips.
- Average trip spending is \$3,285.
- Average party size is 2.5 travelers.
- 92 flights per week from Canadian cities to MCO (2023).
- Ontario & Quebec are top origin markets. Snowbirds also travel by car.
- Prefer to travel from November through April.



International Consumer Profiles

Mexico



These multi-generational consumers range from young singles to families where the focus is on personal relationships and quality time. They make their travel decisions 88 days before their trip and book their flight 56 days ahead. The destination choice is most influenced by the opinions of those around them and the online perception of a destination, especially in social media channels. These consumers are heavy users of social media with 85% of internet users connected to Facebook and Instagram, and 82% to YouTube. These consumers book directly with airlines and travel agents before using an OTA. This market primarily wants to have fun, relax, shop, and post their adventures on social media.

Type of Accommodation:

	U.K.	Canada	Mexico	Colombia	Brazil
Hotel	87.3%	84.9%	86.3%	55.5%	73.0%
Vacation Homes	10.6%	14.0%	12.1%	41.1%	24.5%
Other	5.6%	1.9%	2.2%	4.7%	4.4%

Source: SIAT Inbound Survey Monitor

Major Takeaways:

- Largest audience ranges between 24-54 years of age, average visitor 38-39 years old.
- 42% travel with family and relatives while 43% prefer to travel alone.
- 69% book with airlines directly, 27% follow personal recommendations, 26% consult local travel agencies and 22% OTAs.
- Average spending per travel party is \$3,679, while the average per visitor/trip is \$1,700.
- Mexican visitors' spending is centered around shopping (83%), theme parks (79%), sightseeing (61%) and sporting events (19%).
- About 12.6% of Mexican visitors visit friends and relatives on their trip.
- When traveling to Orlando-Kissimmee-Sanford area, 10.7% of Brazilians prefer to visit Miami as well.

Opportunities:

- Florida holds the third spot as a favored US destination.
- 13.7 million active visas as of 2023.
- The appreciation of the Mexican peso in 2023 has made travel from Mexico relatively more affordable. 2024 U.S. elections might affect outbound travel from Mexico.
- 86% stay in a hotel or motel, for an average of 7 nights.
- 12% rent a vacation home and stay 8 nights on average. Vacation homes concept is not well known.
- Children heavily influence travel decisions.
- Top three influential aspects of advertising for Mexican visitors are 52% beautiful images, 46% promotions or ideas and 41% content highlighting unique experiences.

Socioeconomics:

- Median household income is about \$13,989 USD.
- Affluent and younger generations leading the travel trends.
- HHI for the top decile approximately \$5,997 USD.
- Mexico has a young population, with 24% of people ages 14 or younger and only 8% aged 65 or older.

Travel Information:

- Length of stay is 10 nights in destination.
- The average party size is 2.2 travelers.
- 43% of visitors are solo travelers, and 15.5% have a party of 4 or more people.
- 60 flights per week from top Mexican markets to MCO (2023).
- Mexico City and Cancun are top origin markets.
- Busiest travel months are July, August, and December.



International Consumer Profiles Colombia



Colombian visitors are more likely than other international visitors in the US to advantage of a great deal/ package. The travel decisions 92 days before their trip and book their flight 63 days ahead. Traveling to small party sizes of one or two is common. For 39% of Colombian visitors, visiting friends and relatives is part of their travel purpose. The destination choice is most strongly influenced by website searches (travel booking, reviews, destination-specific websites) and social media. Florida is the most preferred US destination. Most of Colombian visitors prefer traveling with their significant other.

Type of Accommodation:

	U.K.	Canada	Mexico	Colombia	Brazil
Hotel	87.3%	84.9%	86.3%	55.5%	73.0%
Vacation Homes	10.6%	14.0%	12.1%	41.1%	24.5%
Other	5.6%	1.9%	2.2%	4.7%	4.4%

Source: SIAT Inbound Survey Monitor

Major Takeaways:

- Average party size is 2.
- Average age is 44 years old for male and 42 years old for female.
- Length of stay is 6 nights for hotels and 10 nights for vacation homes.
- 45% of visitors are solo travelers, 28% travel in a party of 2, and 27% have a party of 3 or more people.
- 82% of Colombian visitors travel for vacation/ holiday purposes only.
- 58% book with airlines directly, 37% follow personal recommendations, 26% consult local travel agencies and 22% OTAs.
- Activities that resonate with this market are shopping (89%), sightseeing (79%), and theme parks (73%).

Opportunities:

- Florida is the most preferred US destination.
- 56% like to visit beaches/seaside when traveling internationally.
- Travelers from Colombia still face challenges getting visa appointments. Wait times in Bogota are currently 725 days.
- 58% of consumers use airlines for trip planning purposes, 37% rely on personal recommendations, and 22% on OTAs.
- Average spending per travel party is \$2,795.
- When traveling to Orlando-Kissimmee-Sanford area, 39% of Colombian visitors prefer to visit Miami as well.

Socioeconomics:

- The national gross income per capita in Colombia is \$15,812 USD.
- The richest 20% of the population in Colombia holds 56.3% of the country's income.
- Income levels can vary significantly across different regions and socioeconomic groups within Colombia.
- Majority of Colombians (58%) are on working age.

Travel Information:

- 30 direct flights per week from Colombian cities to MCO (2023)
- Bogota, Cartagena, and Medellin have nonstop flights to Orlando.
- June-July and October-December are the busiest travel months.



International Consumer Profiles

Brazil



These repeat consumers range from young singles to boomers with most of the market being middle-aged couples. They make their travel decisions 143 days before their trip and book their flight 99 days ahead. Visa wait times are currently 130 days. The destination choice is strongly influenced by shopping and proximity to theme parks. These consumers are heavy users of social media as planning tool for their travel (e.g., Instagram, YouTube, and Facebook); thus, are often influenced by influencers and celebrities. Mostly, this market wants to share the “American Dream” and explore budget friendly options without giving up luxury.

Type of Accommodation:

	U.K.	Canada	Mexico	Colombia	Brazil
Hotel	87.3%	84.9%	86.3%	55.5%	73.0%
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Other	5.6%	1.9%	2.2%	4.7%	4.4%

Source: SIAT Inbound Survey Monitor

Major Takeaways:

- In 2023, the average Brazilian visitors in Orlando-Kissimmee-Sanford area was **43 years old**.
- The average party size is **2.4 travelers**.
- Average length of stay is **19 nights**.
- **40%** of visitors travel with their family/relatives and **22%** have a party of **4 or more people**.
- 45% of Brazilian visitors use social media platforms for selecting a destination.
- Preferred activities are shopping (**89%**), theme park visits (**80%**), and sightseeing experiences (**82%**).
- When traveling to Orlando-Kissimmee-Sanford area, **31%** of Brazilians prefer to visit Miami as well.
- Key impressions of the US include fresh, forward thinking, diverse, down-to-earth, sophisticated, and creative.

Socioeconomics:

- Relatively young population, with only **12%** aged **65+** and median age for women, and **9.8%** for men.
- The top ten percent in Brazil earned an average of **\$1,286 USD**. This is more than **12 times** the average income of the bottom half.
- **Class A** is classified as a gross yearly income of above **\$50,000**, and makes up approximately **3%** of the population.
- **Class B** is classified as a gross yearly income of above **\$25,000**, and makes up approximately **23%** of the population.

Opportunities:

- The main purpose of travel for **87%** is vacation/holiday.
- **64%** of consumers are getting vacation information from airlines, **46%** from personal recommendations, **32%** from OTAs.
- **54.7%** rented an auto during their trip, while **28%** used air travel between U.S. cities.
- **One third** of travelers travel solo.
- **73%** stay in a hotel or motel, for an average of **9 nights**.
- **24.5%** rent a vacation home and stay **17 nights** on average.
- Average household income of travelers is **\$73,845**. Only **39.5%** earn more than **\$60,000** annually.
- Average spending per travel party is **\$5,595**, while the average per visitor/trip is **\$2,378**.
- Primary Spendings categories: shopping/gifts (**25.6%**), entertainment and recreation (**23.3%**), accommodations/lodging (**19.2%**) and food & beverage (**17.3%**).

Travel Information:

- **20 direct flights** per week from Brazil to MCO (2023).
- Prefer to travel **December - February** and **July – August**.
- Florida ranks as the top state with interest for visiting.