Naples, Marco Island, Everglades Convention and Visitors Bureau

April 2019 Visitor Profile

Prepared for:

Collier County Board of County Commissioners

and

Naples, Marco Island, Everglades Convention and Visitors Bureau

Prepared by:

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May 2019

Executive Summary: *April 2019*

1. This April, some **147,100** visitors stayed in Collier's commercial lodgings **(+7.3%)***. Their visits contributed an estimated **$234,567,100** of economic impact to the County **(+9.8%)**. Key performance metrics are as follows:

April	2018	2019**	% Δ
Occupancy	82.5%	81.2%	-1.6%
ADR	$306.4	$321.0	+4.8%
RevPAR	$252.8	$260.7	+3.1%

* Available records suggest that approximately 15 Collier lodging units remained closed in April 2019. (April 2018: 650 units)
Additionally, approximately 110 new units were added to Collier's rental pool since last April.

2. Collier's April visitation originates from the following primary market segments:

April Visitation	2019 Visitor #	Δ
Florida	40,158	+14.4
Southeast	9,561	+16.2
Northeast	34,716	+6.4
Midwest	27,361	-0.7
Canada	4,119	+15.6
Europe	23,683	+1.0
Other	7,502	+14.0
Total	**147,100**	**+7.3**

U.S. Regions

3. Compared to last April, **33.4%** of Collier lodging managers report their three month forward reservations levels as "up."

% of Properties (April) Reporting Reservations:	**2018**	**2019**
Up	61.0%	33.4%
Same	30.4	50.4
Down	8.7	16.2

4. This April, seven out of ten of the destination's visitors flew *(2018: 72.5%; 2019: 70.6%)*. A majority of these **(65.1%)** deplaned at RSW, with Miami capturing some **14.9%** of deplanements.

5. This April, visitor party size averaged **2.8** travelers who stayed for **3.5 nights** in the Naples, Marco Island, Everglades area *(2018: 2.8 people; 3.6 nights)*.

6. Some **44.1%** of Collier's April visitors are in the destination for the first time.

7. Fully **95.9%** consult the web for trip information, with some **77.8%** making bookings for their trip online.

8. The majority **(96.3%)** are satisfied with their Collier stay, with **90.6%** planning a future trip to the area.

9. The typical April visitor is **50.1 years of age**.

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Naples, Marco Island, Everglades:

April 2019 Visitor Profile

NAPLES
MARCO ISLAND
EVERGLADES
FLORIDA'S PARADISE COAST

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Naples, Marco Island, Everglades Visitor Profile | April 2019

H/M/C+ Visitor Statistics	Year to Date (January – April)		% Δ	April		% Δ
	2018	2019	'18/'19	2018	2019**	'18/'19
Visitors (#)	758,100	792,500	+4.5	137,100	147,100	+7.3
Room Nights	957,100	1,004,100	+4.9	212,500	221,700	+4.3
Direct Exp. ($)	$683,849,800	$730,945,300	+6.9	$143,284,600	$157,322,000	+9.8
Total Eco. Impact ($)	$1,019,620,200	$1,089,839,400	+6.9	$213,637,300	$234,567,100	+9.8

+ Visitors staying in commercial lodging subject to the resort tax (hotel/motel/condo, etc.)

April Occupancy

82.5 (2018)
81.2 (2019)

April Economic Impact

Total Eco. Impact
■ Indirect/Induced
■ Direct Exp.

2018: 213,637,300 (70,352,700 / 143,284,600)
2019: 234,567,100 (77,245,100 / 157,322,000)

April Room Rates

306.4 (2018)
321.0 (2019)
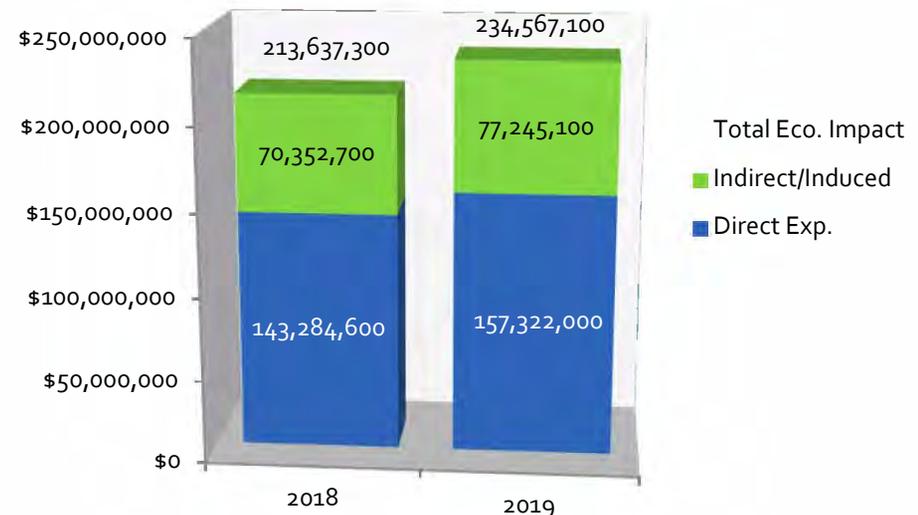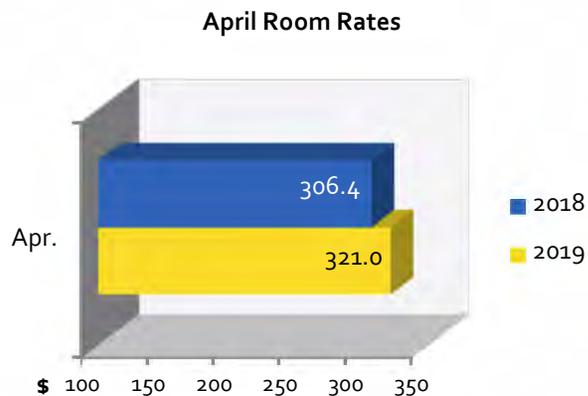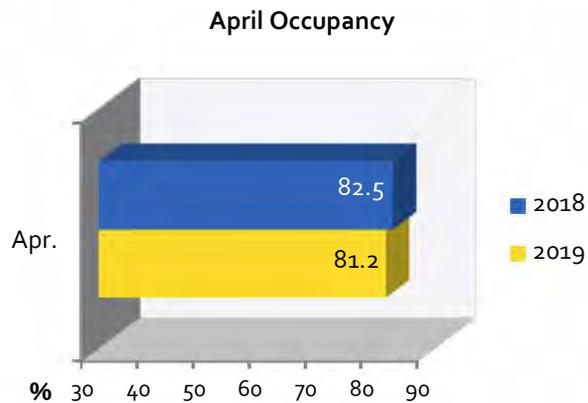
April

Lodging Statistics	2018	2019**	% Δ '18/'19
Occupancy	82.5%	81.2%	-1.6
Room Rates	$306.4	$321.0	+4.8
RevPAR	$252.8	$260.7	+3.1

*** Note: Available records suggest that approximately 15 Collier lodging units remained closed in April 2019. (April 2018: 650 units). Additionally, approximately 110 new units were added to Collier's rental pool since last April.*

Naples, Marco Island, Everglades Visitor Profile | April 2019

April 2019 Visitor Origin Markets

Visitor Origins	2018		2019		% Δ '18/'19
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	25.6%	35,098	27.3%	40,158	+14.4
Southeast	6.0	8,226	6.5	9,561	+16.2
Northeast	23.8	32,630	23.6	34,716	+6.4
Midwest	20.1	27,557	18.6	27,361	-0.7
Canada	2.6	3,564	2.8	4,119	+15.6
Europe	17.1	23,444	16.1	23,683	+1.0
Other	4.8	6,581	5.1	7,502	+14.0
Total	**100.0**	**137,100**	**100.0**	**147,100**	**+7.3**

April 2019 Visitor Origins

Legend:
- Florida
- Southeast
- Northeast
- Midwest
- Canada
- Europe
- Other

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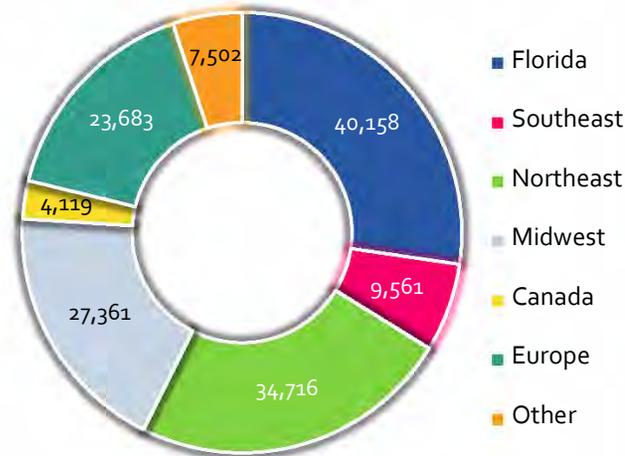
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Transportation Mode *(Multiple Response)*

	April 2018	April 2019	
Plane	72.5%	70.6%	↓
Rental Car	62.7	58.9	↓
Personal Car	26.5	29.0	↑

Airport Deplaned *(Base: Flew)*

	April 2018	April 2019	
Southwest Florida International	62.4%	65.1%	↑
Miami International	17.9	14.9	↓
Ft. Lauderdale International	4.9	5.9	↑
Orlando International/Sanford	5.6	5.0	↓
Tampa International	2.9	2.8	↓

Purpose of Trip *(Multiple Response)*

	April 2018	April 2019	
Vacation/Weekend Getaway	85.5%	86.3%	↑
Group Travel	25.3	23.0	↓
Visit with Friends and Relatives	14.3	13.4	↓
Special Event	--	5.9	

First Visit to *(% yes)*

	April 2018	April 2019	
Collier County	47.1%	44.1%	↓
Florida	5.7	6.1	↑

Length of Stay *(Days)*

	April 2018	April 2019	
In Collier County	4.6	4.5	↓

Party Size

	April 2018	April 2019	
Number of People	2.8	2.8	—

Transportation

Airport Deplaned *(Top Four)*

Length of Stay in Collier County *(Days)*

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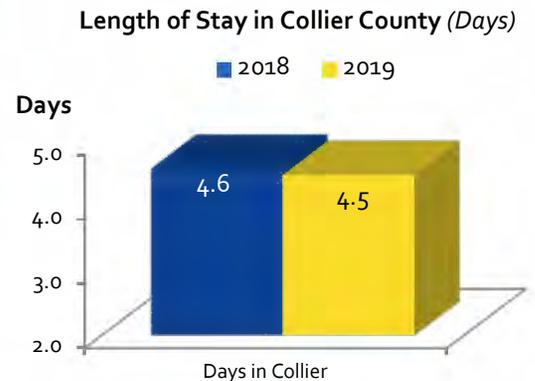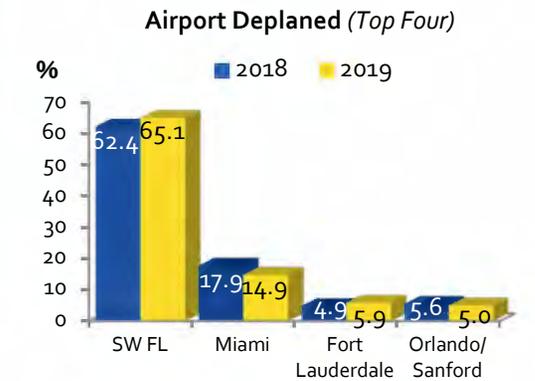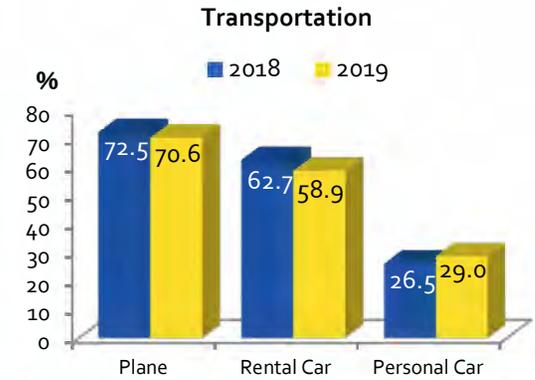
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Party Composition *(Multiple Response)*

	April 2018	April 2019	
Couple	57.8%	58.8%	↑
Family	31.3	31.9	↑
Single	13.5	10.8	↓
Group of Friends	4.5	3.9	↓

Party Composition *(Top Three)*
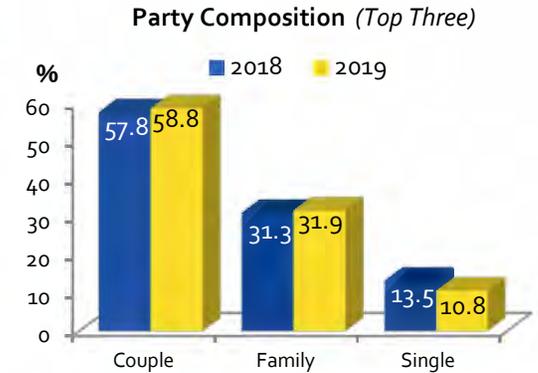
Did Party Have Lodging Reservations for Stay

	April 2018	April 2019	
% Yes	94.0%	95.2%	↑
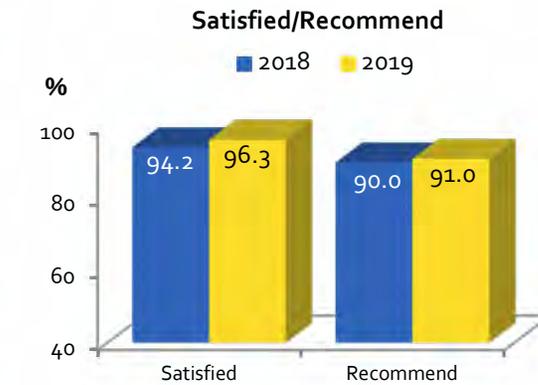
Expense Relative to Expectations

	April 2018	April 2019	
More Expensive	19.6%	17.7%	↓
Less Expensive	3.7	4.7	↑
As Expected	75.9	76.5	↑

Satisfied/Recommend
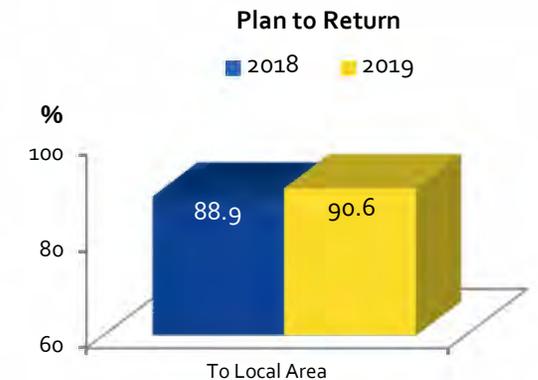
Satisfaction with Collier County

	April 2018	April 2019	
Very Satisfied	83.1%	86.7%	↑
Satisfied	11.1	9.6	↓
Satisfaction Level *(Combined)*	**94.2%**	**96.3%**	↑

Recommend Collier to Friends/Relatives

	April 2018	April 2019	
% Yes	90.0%	91.0%	↑

Plan to Return

Plan to Return *(% Yes)*

	April 2018	April 2019	
To Local Area	88.9%	90.6%	↑

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Activities Enjoyed in Area *(Multiple Response)*

Activity	April 2018	April 2019	
Beach	75.5%	80.4%	↑
Dining Out	78.5	80.1	↑
Relaxing	69.0	71.4	↑
Pool	61.5	64.7	↑
Shopping	51.0	51.5	↑
Swimming	40.1	42.9	↑
Sunsets	32.7	37.4	↑
Enjoying Nature/Bird Watching/Everglades	30.7	34.8	↑
Sunning	24.2	25.2	↑
Bars/Nightlife	23.5	25.0	↑
Reading	20.5	23.6	↑
Walking	18.5	22.1	↑
Sightseeing	19.9	21.9	↑
Visiting with Friends/Relatives	23.1	19.5	↓
Art Galleries/Shows/Fairs	13.7	12.6	↓
Golfing	6.1	5.9	↓

Activities Enjoyed in Area *(Top Five)*

Legend: 2019 (yellow), 2018 (blue)

| Activity	2019	2018
Beach	80.4	75.5
Dining Out	80.1	78.5
Pool	64.7	61.5
Relaxing	71.4	69.0
Shopping	51.5	51.0
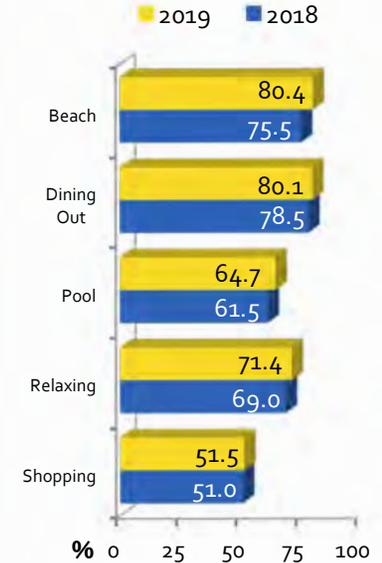
Demographics

	April 2018	April 2019	
Average Age Head of Household *(Years)*	48.8	50.1	↑
Median Annual Household Income	$161,745	$164,172	↑

Collier Base Budget

	April 2018	April 2019	
Total	$2,926.31	$2,994.57	↑
Per Person/Stay	1,045.11	1,069.49	↑
Per Person/Day	227.20	237.66	↑

Collier Base Budgets

Legend: 2018 (blue), 2019 (yellow)

	2018	2019
Total Party Budget	2,926	2,995
Per Person/Stay	1,045	1,069
Per Person/Day	227	238

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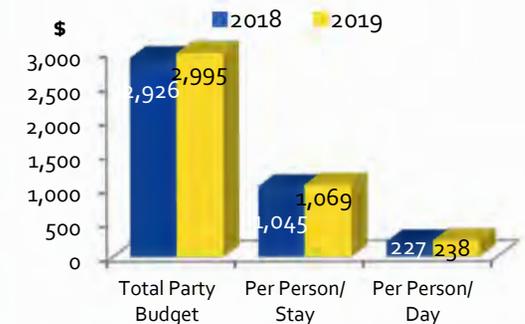
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Area Information Seen/Read/Heard	April 2018	April 2019	
% Yes	58.5%	58.2%	↓

Directly Influenced by Information
(Base: Seen/Read/Heard Area Information)

	April 2018	April 2019	
% Yes	44.0%	47.2%	↑

| Why Chose the Area *(Multiple Response)*	April 2018	April 2019	
Beach Area	53.7%	55.5%	↑
Weather	52.9	54.2	↑
Restaurants	40.9	43.8	↑
Relaxing	39.1	40.4	↑
Previous Experience	34.2	38.9	↑
Quiet/Peaceful/Laid Back	35.9	35.5	↓
Quality of Accommodations	27.5	30.0	↑
Outdoor Recreation/Nature	29.1	29.8	↑
Appealing Brochures/Websites	25.2	23.8	↓
Never Been	25.8	23.5	↓
Recommendation	23.8	22.0	↓
Business/Meeting/Conference	22.2	19.6	↓
Not Crowded	19.6	19.1	↓

Internet Use	April 2018	April 2019	
Use Internet to Obtain Travel Info for This Trip *(% Yes)*	95.0%	95.9%	↑
Book Reservations for Trip Online *(%Yes)*	77.2	77.8	↑

Seen/Read/Heard
■ 2018 ■ 2019

58.5   58.2
% Yes

Info. Influenced
■ 2018 ■ 2019

44.0   47.2
% Yes

Internet Use
■ 2018 ■ 2019

95.0 95.9   Use Web for Travel Info This Trip
77.2 77.8   Book Reserv for Trip Online

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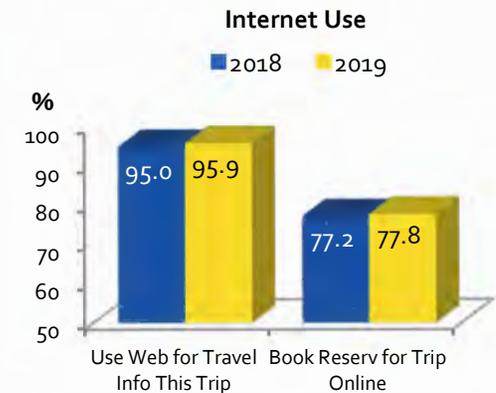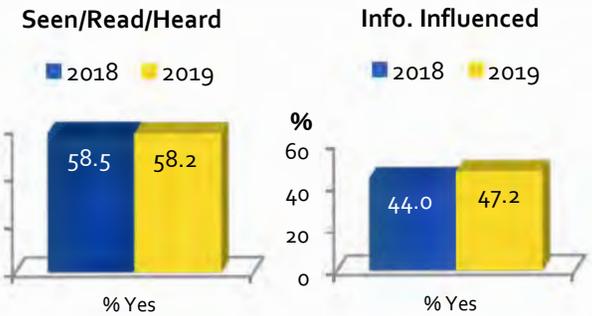
Industry Data:

2015 - 2019

Collier Direct Leisure and Hospitality Employment *(Calendar Year)* *

	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
2019	31,800	32,300	31,900	31,300								
2018	30,700	31,600	31,700	30,500	29,100	27,500	26,600	26,500	26,300	27,500	29,500	30,700
2017	30,300	30,700	31,100	30,400	28,700	27,000	25,800	25,900	23,400	26,700	29,200	30,300
2016	29,000	29,700	29,700	29,000	27,500	25,900	25,000	24,800	24,800	26,300	28,500	29,300
2015	27,700	28,400	28,600	27,900	26,300	24,800	23,800	23,800	24,000	25,600	27,900	28,700

Y-axis label: Monthly Direct Leisure and Hospitality Employment

* Source: Florida Department of Economic Opportunity/U.S. Department of Labor. (May 2017 through December 2018 employment projections revised as of March 11, 2019 reporting.)

Southwest Florida International Airport (RSW) Passenger Traffic

CY 2015: 8.37 million (+5.0%)

CY 2016: 8.60 million (+2.8%)

CY 2017: 8.84 million (+2.8%)

CY 2018: 9.37 million (+6.0%)

CY 2019 to date: 4.76 million (+9.7%)

RSW Total Passenger Traffic
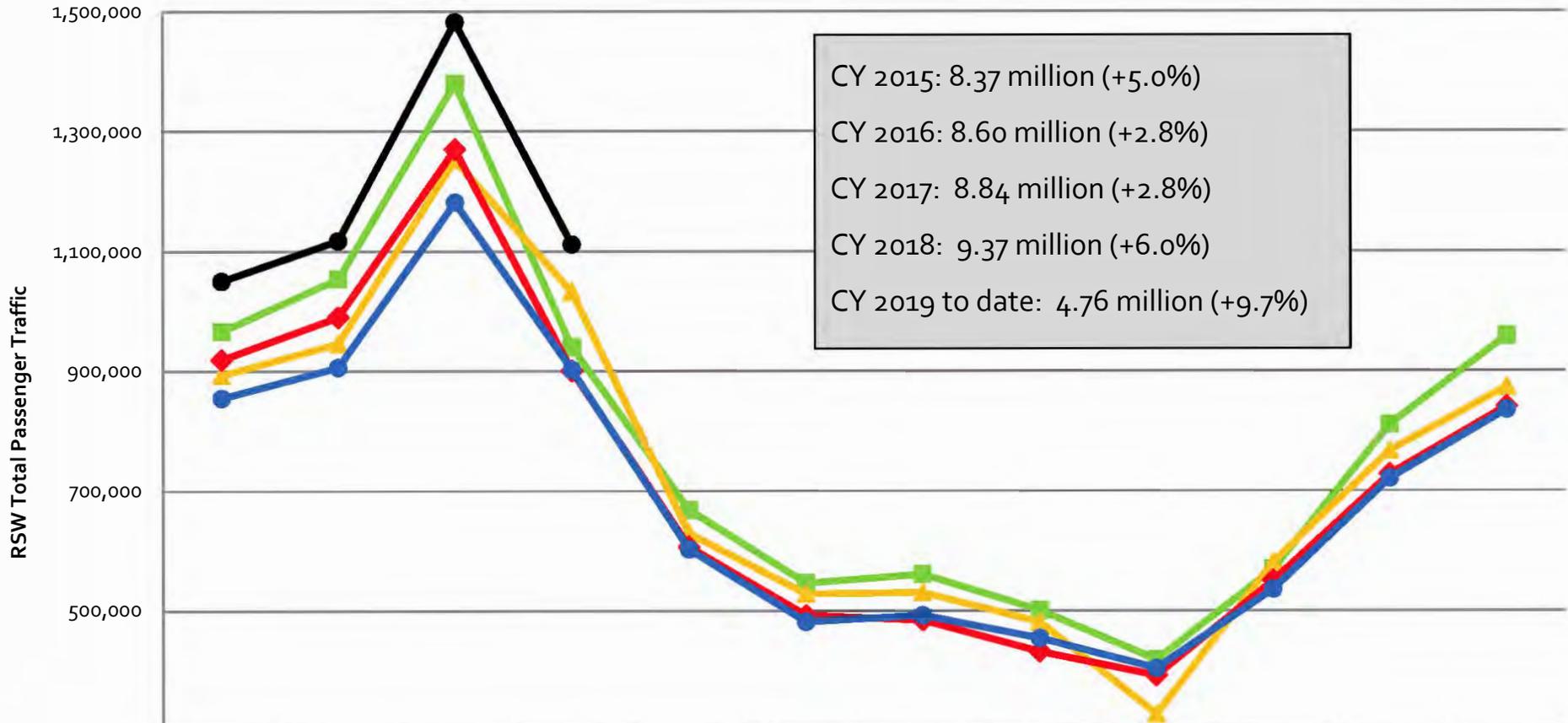
	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
2019	1,050,093	1,117,409	1,482,239	1,111,558								
2018	965,981	1,053,817	1,379,728	939,957	668,665	546,159	561,039	501,023	418,256	569,553	810,283	958,717
2017	892,905	946,079	1,252,124	1,032,783	629,321	528,383	530,428	481,185	327,466	581,317	767,064	873,494
2016	918,929	989,845	1,269,961	900,594	606,833	492,413	484,074	431,729	391,844	550,316	727,634	840,501
2015	854,953	906,039	1,181,382	902,669	602,891	481,512	492,114	454,360	404,045	535,921	720,556	835,359

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