Naples, Marco Island, Everglades Convention and Visitors Bureau

December 2019 Visitor Profile

Prepared for:

Collier County Board of County Commissioners

and

Naples, Marco Island, Everglades Convention and Visitors Bureau

Prepared by:

Research Data Services, Inc.

www.ResearchDataLLC.com
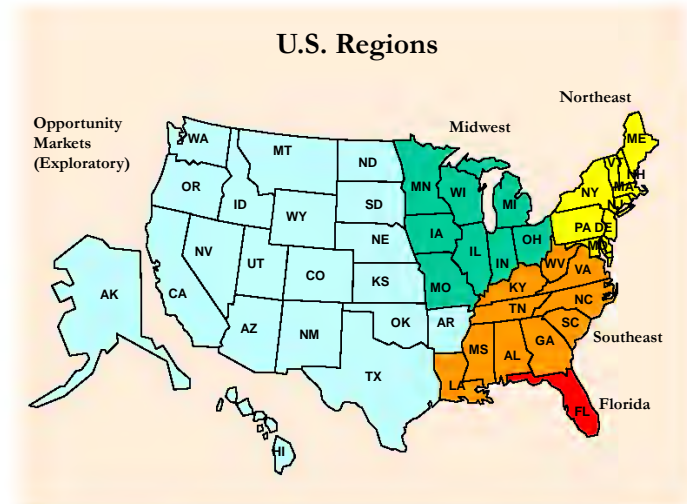
January 2020

Executive Summary: *December 2019*

1. This December, some **181,000** visitors stayed in Collier's commercial lodgings **(+6.0%)*.** Their visits contributed an estimated **$244,068,600** of economic impact to the County **(+10.6%)**. Key performance metrics are as follows:

December	2018	2019*	%Δ
Occupancy	74.7%	76.9%	+2.9%
ADR	$253.0	$256.6	+1.4%
RevPAR	$189.0	$197.3	+4.4%

* According to the Florida Department of Business and Professional Regulation (DBPR), Collier transient lodging inventory has grown by 533 units (+5.3%) since December of 2018. (2018: 10,001; 2019: 10,534)

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

December Visitation	2019 Visitor #	Δ
Florida	68,237	+3.8
Southeast	12,127	-2.7
Northeast	23,349	-1.6
Midwest	29,503	+8.0
Canada	5,068	+2.4
Europe	30,951	+14.8
Other	11,765	+23.1
Total	**181,000**	**+6.0**

U.S. Regions

3. Compared to last December, **61.7%** of Collier lodging managers report their three month forward reservations levels as "up."

% of Properties (December) Reporting Reservations:	2018	2019
Up	54.5%	61.7%
Same	20.6	27.1
Down	24.9	11.2

4. This December, over half of the destination's visitor parties flew *(2018: 63.1%; 2019: 64.8%).* A majority of these **(66.5%)** deplaned at RSW, with Miami capturing some **18.6%** of deplanements.

5. This December, visitor party size averaged **2.7** travelers who stayed for **3.2 nights** in the Naples, Marco Island, Everglades area *(2018: 2.8 people; 3.1 nights).*

6. Some **37.2%** of Collier's December visitors are in the destination for the first time.

7. Fully **94.4%** consult the web for trip information, with some **79.2%** making bookings for their trip online.

8. The majority **(98.4%)** are satisfied with their Collier stay, with **94.5%** planning a future trip to the area.
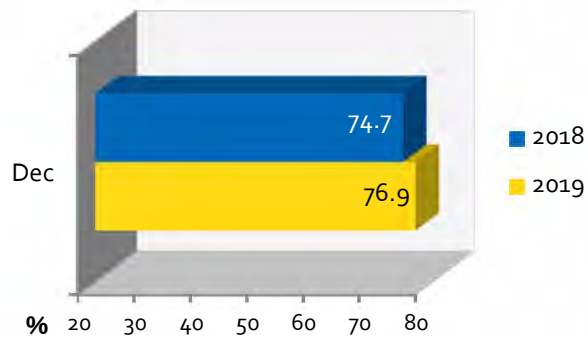
9. The typical December visitor is **49.8 years of age**.

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# Naples, Marco Island, Everglades:
December 2019 Visitor Profile

Naples, Marco Island, Everglades Visitor Profile | December 2019

H/M/C+ Visitor Statistics	Calendar Year (January – December)		% Δ	December		% Δ
	2018	2019	'18/'19	2018	2019	'18/'19
Visitors (#)	1,823,300	1,928,600	+5.8	170,700	181,000	+6.0
Room Nights	2,380,700	2,532,900	+6.4	203,800	221,000	+8.4
Direct Exp. ($)	$1,436,686,500	$1,552,496,600	+8.1	$147,969,600	$163,694,600	+10.6
Total Eco. Impact ($)	$2,142,099,700	$2,314,772,300	+8.1	$220,622,700	$244,068,600	+10.6

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

December Occupancy
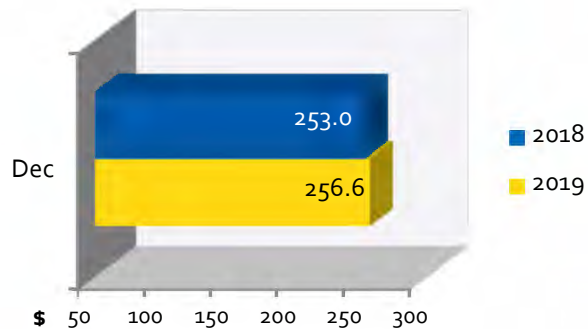
December Economic Impact

December Room Rates
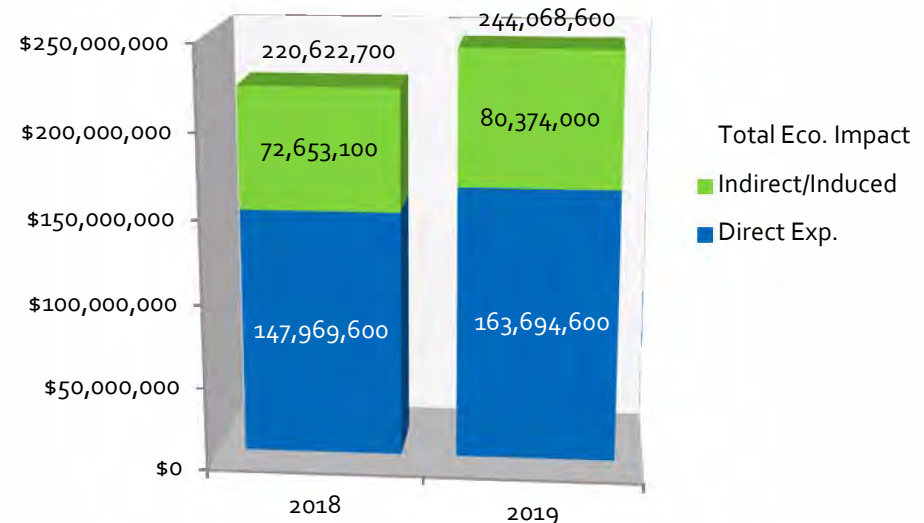
December

Lodging Statistics	2018	2019**	% Δ '18/'19
Occupancy	74.7%	76.9%	+2.9
Room Rates	$253.0	$256.6	+1.4
RevPAR	$189.0	$197.3	+4.4

*** According to the Florida Department of Business and Professional Regulation (DBPR), Collier transient lodging inventory has grown by 533 units (+5.3%) since December of 2018. (2018: 10,001; 2019: 10,534)*

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December 2019 Visitor Origin Markets

Visitor Origins	2018		2019		% Δ '18/'19
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	38.5%	65,720	37.7%	68,237	+3.8
Southeast	7.3	12,461	6.7	12,127	-2.7
Northeast	13.9	23,727	12.9	23,349	-1.6
Midwest	16.0	27,312	16.3	29,503	+8.0
Canada	2.9	4,950	2.8	5,068	+2.4
Europe	15.8	26,971	17.1	30,951	+14.8
Other	5.6	9,559	6.5	11,765	+23.1
Total	**100.0**	**170,700**	**100.0**	**181,000**	**+6.0**

December 2019 Visitor Origins

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

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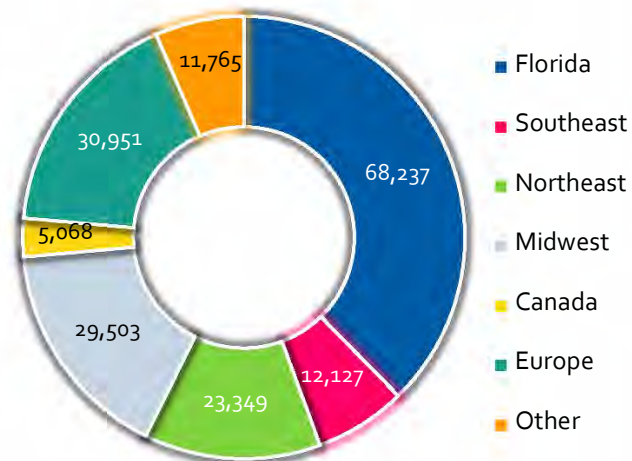
Naples, Marco Island, Everglades Visitor Profile | December 2019

Transportation Mode *(Multiple Response)*

	December 2018	December 2019	
Plane	63.1%	64.8%	↑
Rental Car	62.2	61.7	↓
Personal Car	36.4	34.8	↓

Airport Deplaned *(Base: Flew)*

	December 2018	December 2019	
Southwest Florida International	65.8%	66.5%	↑
Miami International	19.8	18.6	↓
Orlando International/Sanford	4.8	5.5	↑
Ft. Lauderdale International	6.4	5.3	↓

Purpose of Trip *(Multiple Response)*

	December 2018	December 2019	
Vacation/Weekend Getaway	84.9%	82.5%	↓
Group Travel	27.3	28.2	↑
Visit with Friends and Relatives	17.2	16.5	↓
Special Event	7.4	6.4	↓

First Visit to *(% yes)*

	December 2018	December 2019	
Collier County	37.7%	37.2%	↓
Florida	3.5	2.6	↓

Length of Stay *(Days)*

	December 2018	December 2019	
In Collier County	4.1	4.2	↑

Party Size

	December 2018	December 2019	
Number of People	2.8	2.7	↓

Transportation

%

- 2018
- 2019

	Plane	Rental Car	Personal Car
2018	63.1	62.2	36.4
2019	64.8	61.7	34.8

Airport Deplaned *(Top Four)*

%

- 2018
- 2019

	SW FL	Miami	Orlando/Sanford	Ft. Lauderdale
2018	65.8	19.8	4.8	6.4
2019	66.5	18.6	5.5	5.3

Length of Stay in Collier County *(Days)*

Days

- 2018
- 2019

Days in Collier	
4.1	4.2

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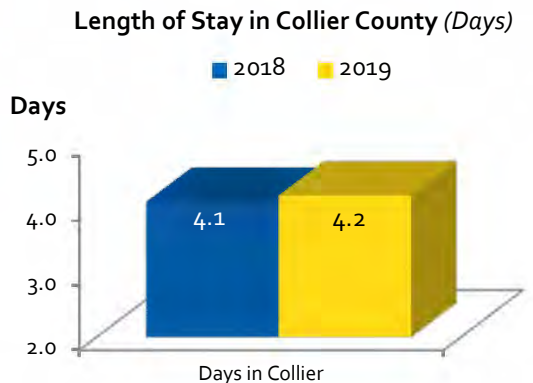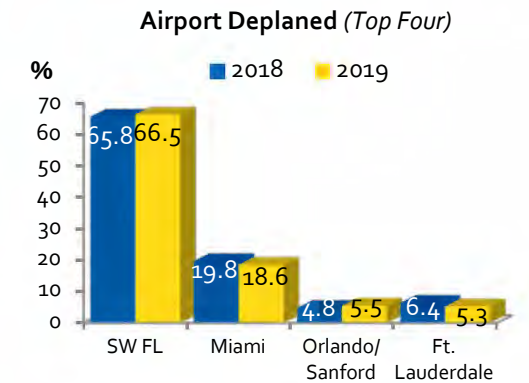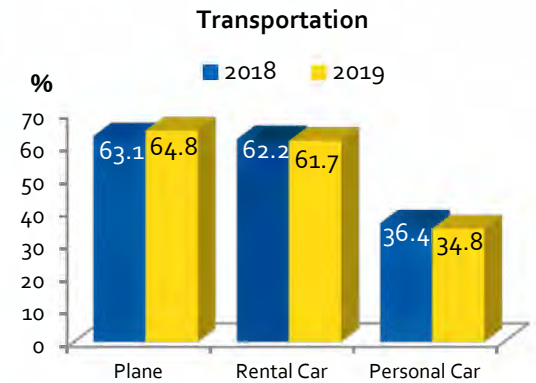
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Party Composition *(Multiple Response)*

	December 2018	December 2019	
Couple	57.3%	60.4%	⬆
Family	30.4	28.7	⬇
Single	10.0	12.0	⬆
Business Associates	8.1	9.6	⬆
Group of Friends	5.7	4.1	⬇

Did Party Have Lodging Reservations for Stay

	December 2018	December 2019	
% Yes	98.4%	98.6%	⬆

Expense Relative to Expectations

	December 2018	December 2019	
More Expensive	14.6%	12.0%	⬇
Less Expensive	5.9	5.3	⬇
As Expected	75.0	77.8	⬆

Satisfaction with Collier County

	December 2018	December 2019	
Very Satisfied	83.5%	86.1%	⬆
Satisfied	13.8	12.3	⬇
Satisfaction Level *(Combined)*	**97.3%**	**98.4%**	⬆

Recommend Collier to Friends/Relatives

	December 2018	December 2019	
% Yes	95.5%	96.1%	⬆

Plan to Return *(% Yes)*

	December 2018	December 2019	
To Local Area	93.5%	94.5%	⬆

Party Composition *(Top Three)*

Legend: ■ 2018 ■ 2019

- Couple: 57.3 / 60.4
- Family: 30.4 / 28.7
- Single: 10.0 / 12.0

Satisfied/Recommend

Legend: ■ 2018 ■ 2019

- Satisfied: 97.3 / 98.4
- Recommend: 95.5 / 96.1

Plan to Return

Legend: ■ 2018 ■ 2019

- To Local Area: 93.5 / 94.5

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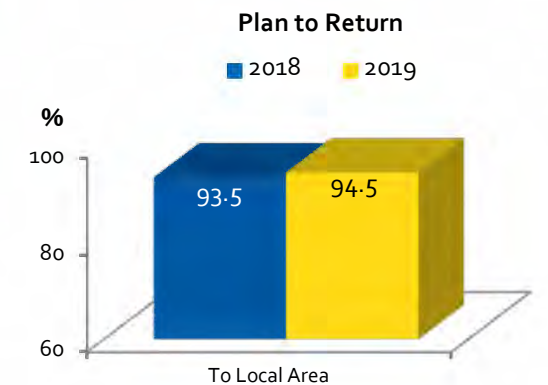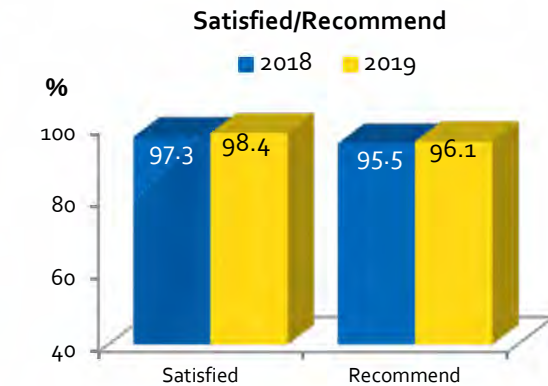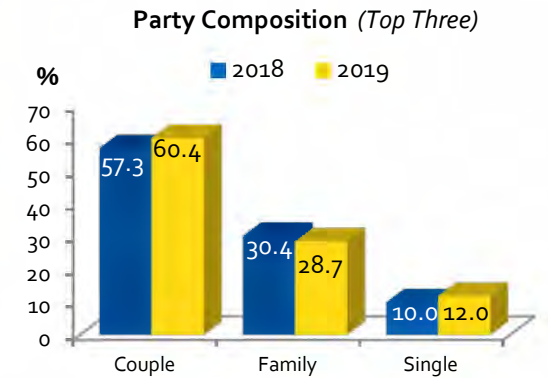
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Activities Enjoyed in Area *(Multiple Response)*	December 2018	December 2019	
Beach	81.6%	79.7%	↓
Dining Out	74.2	77.0	↑
Relaxing	52.5	50.7	↓
Shopping	46.6	49.6	↑
Sunsets	37.2	41.6	↑
Pool	35.7	31.4	↓
Walking	25.1	29.5	↑
Art Galleries/Shows/Fairs	25.7	27.8	↑
Reading	18.9	23.1	↑
Enjoying Nature/Bird Watching/Everglades	16.0	22.1	↑
Sunning	18.4	20.9	↑
Visiting with Friends/Relatives	23.5	20.6	↓
Sightseeing	18.7	17.3	↓
Bars/Nightlife	14.0	16.4	↑
Swimming	12.5	11.7	↓
Golfing	11.1	10.5	↓

Activities Enjoyed in Area *(Top Five)*

- 2019
- 2018

Beach	79.7 (2019) / 81.6 (2018)
Dining Out	77.0 (2019) / 74.2 (2018)
Relaxing	50.7 (2019) / 52.5 (2018)
Shopping	49.6 (2019) / 46.6 (2018)
Sunsets	41.6 (2019) / 37.2 (2018)

% 0   25   50   75   100
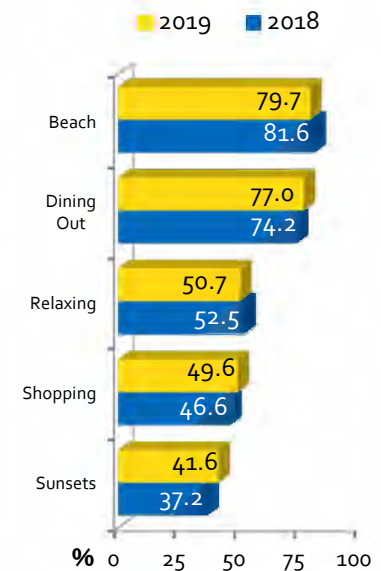
Demographics	December 2018	December 2019	
Average Age Head of Household *(Years)*	50.1	49.8	↓
Median Annual Household Income	$164,175	$166,724	↑
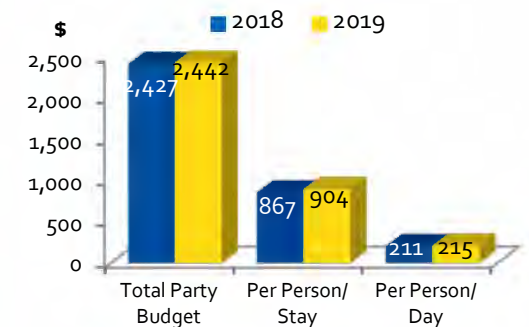
Collier Base Budget	December 2018	December 2019	
Total	$2,427.15	$2,441.84	↑
Per Person/Stay	866.84	904.39	↑
Per Person/Day	211.42	215.33	↑

Collier Base Budgets

- 2018
- 2019

	$	
Total Party Budget	2,427 / 2,442
Per Person/Stay	867 / 904
Per Person/Day	211 / 215

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Area Information Seen/Read/Heard	December 2018	December 2019	
% Yes	56.9%	59.0%	↑

Directly Influenced by Information *(Base: Seen/Read/Heard Area Information)*	December 2018	December 2019	
% Yes	36.4%	34.8%	↓

Why Chose the Area *(Multiple Response)*	December 2018	December 2019	
Beach Area	57.5%	55.9%	↓
Weather	49.1	50.3	↑
Relaxing	49.9	46.7	↓
Quiet/Peaceful/Laid Back	38.3	40.8	↑
Quality of Accommodations	34.6	38.1	↑
Previous Experience	36.7	37.5	↑
Restaurants	34.4	36.1	↑
Outdoor Recreation/Nature	29.8	28.7	↓
Business/Meeting/Conference	26.6	27.5	↑
Never Been	30.5	27.3	↓
Not Crowded	29.5	26.0	↓
Recommendation	22.2	21.3	↓
Appealing Brochures/Websites	24.2	20.9	↓

Internet Use	December 2018	December 2019	
Use Internet to Obtain Travel Info for This Trip *(% Yes)*	94.8%	94.4%	↓
Book Reservations for Trip Online *(%Yes)*	78.2	79.2	↑

Seen/Read/Heard
2018 / 2019

% Yes: 56.9 / 59.0

Info. Influenced
2018 / 2019

% Yes: 36.4 / 34.8

Internet Use
2018 / 2019

Use Web for Travel Info This Trip: 94.8 / 94.4
Book Reserv for Trip Online: 78.2 / 79.2

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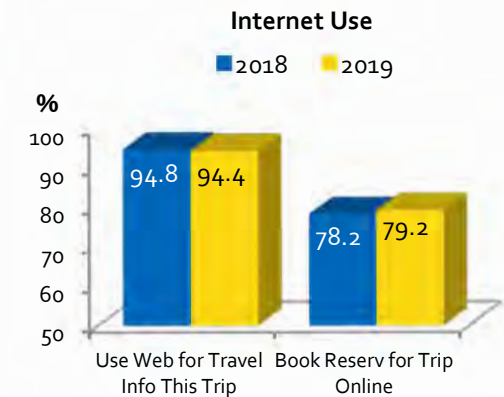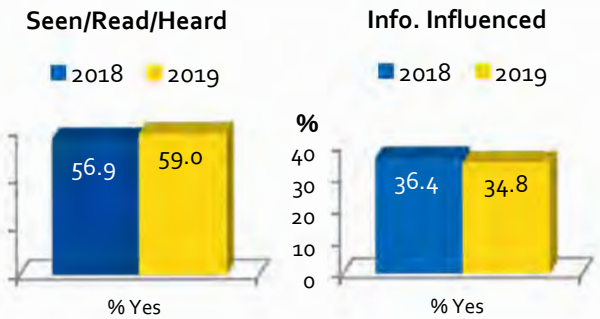
Industry Data:

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	31,400	30,500	27,900	27,300	27,100	27,700	29,400	32,000	
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

* 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.)

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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: 10.23 million (+9.1%)
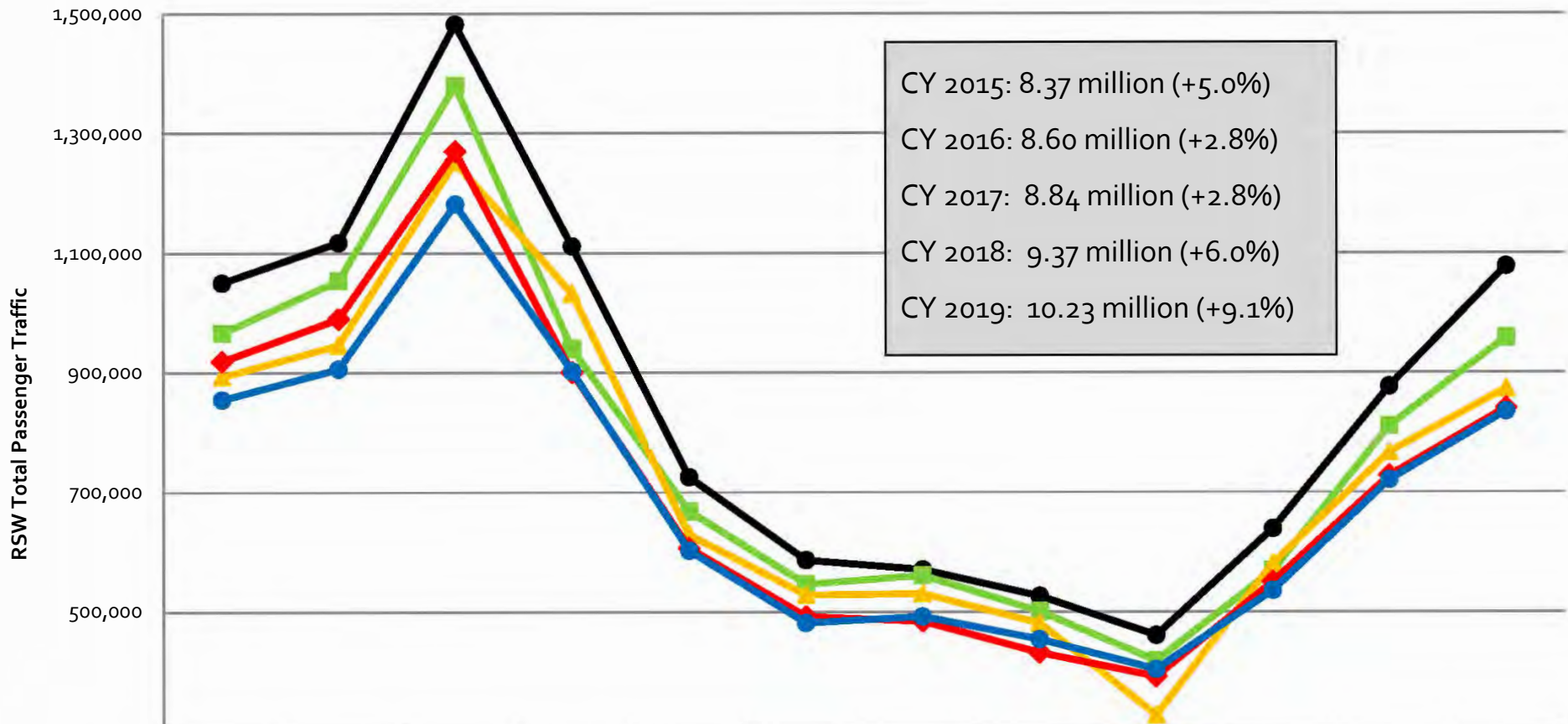
	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
2019	1,050,093	1,117,409	1,482,239	1,111,558	725,754	586,319	570,977	526,519	460,869	638,922	876,703	1,077,818
2018	965,981	1,053,817	1,379,728	939,957	668,665	546,159	561,039	501,023	418,256	569,553	810,283	958,717
2017	892,905	946,079	1,252,124	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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