Naples, Marco Island, Everglades Convention and Visitors Bureau

February 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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March 2019

Executive Summary: *February 2019*

1. This February, some **211,300** visitors stayed in Collier's commercial lodgings **(+4.8%)***. Their visits contributed an estimated **$292,156,800** of economic impact to the County **(+5.5%)**. Key performance metrics are as follows:

February	2018	2019**	% Δ
Occupancy	93.6%	91.8%	-1.9%
ADR	$367.7	$381.4	+3.7%
RevPAR	$344.2	$350.1	+1.7%

* Available records suggest that approximately 30 Collier lodging units remained closed in February 2019. (February 2018: 660 units)
Additionally, approximately 100 new units were added to Collier's rental pool since last February.

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

February Visitation	2019 Visitor #	Δ
Florida	43,951	+1.4
Southeast	15,425	-0.6
Northeast	60,855	+8.6
Midwest	41,837	+1.2
Canada	9,297	+28.1
Europe	27,680	-0.5
Other	12,255	+19.2
Total	**211,300**	**+4.8**

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3. Compared to last February, **56.9%** of Collier lodging managers report their three month forward reservations levels as "up" *(2018: 56.5%)*.

% of Properties (February) Reporting Reservations:	**2018**	**2019**
Up	56.5%	56.9%
Same	41.5	24.0
Down	2.0	19.2

4. This February, seven out of ten of the destination's visitor parties flew *(2018: 68.8%; 2019: 70.4%)*. A majority of these **(66.4%)** deplaned at RSW, with Miami capturing some **15.0%** of deplanements.

5. This February, visitor party size averaged **2.6** travelers who stayed for **3.1 nights** in the Naples, Marco Island, Everglades area *(2018: 2.7 people; 3.3 nights)*.

6. Some **34.3%** of Collier's February visitors are in the destination for the first time.

7. Fully **95.5%** consult the web for trip information, with some **77.3%** making bookings for their trip online.

8. The majority **(96.7%)** are satisfied with their Collier stay, with **91.9%** planning a future trip to the area.

9. The typical February visitor is **52.6 years of age**.

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

Naples, Marco Island, Everglades Visitor Profile | February 2019

| H/M/C+ Visitor Statistics | Calendar Year (January – December) | | % Δ | February | | % Δ |
	2017	2018	'17/'18	2018	2019*	'18/'19
Visitors (#)	1,774,800	1,823,300	+2.7	201,600	211,300	+4.8
Room Nights	2,364,300	2,380,700	+0.7	246,400	260,400	+5.7
Direct Exp. ($)	$1,373,918,000	$1,436,686,500	+4.6	$185,726,000	$195,946,900	+5.5
Total Eco. Impact ($)	**$2,048,511,800**	**$2,142,099,700**	**+4.6**	**$276,917,500**	**$292,156,800**	**+5.5**

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

February Occupancy

February Room Rates

February Economic Impact
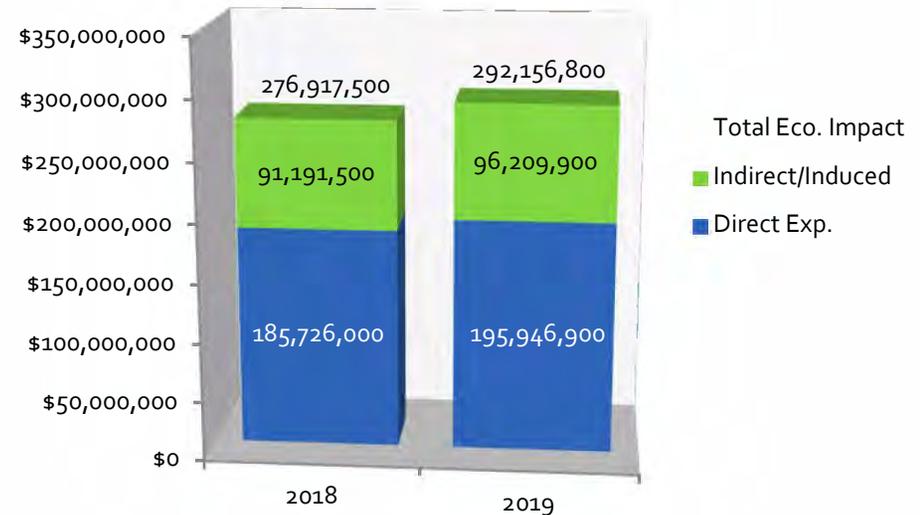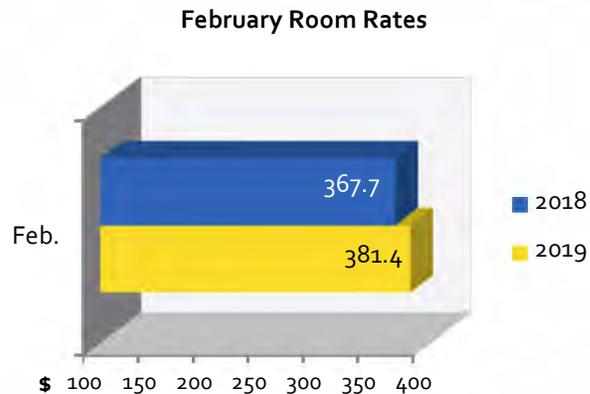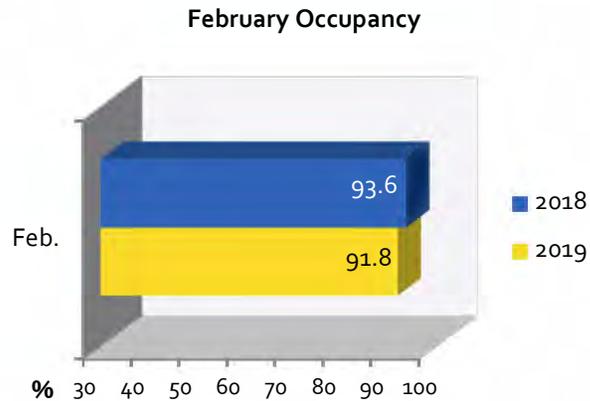
| Lodging Statistics | February | | |
	2018	2019**	% Δ '18/'19
Occupancy	93.6%	91.8%	-1.9
Room Rates	$367.7	$381.4	+3.7
RevPAR	$344.2	$350.1	+1.7

** Note: Available records suggest that approximately 30 Collier lodging units remained closed in February 2019. (February 2018: 660 units). Additionally, approximately 100 new units were added to Collier's rental pool since last February.

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February 2019 Visitor Origin Markets

Visitor Origins	2018		2019		% Δ '18/'19
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	21.5%	43,344	20.8%	43,951	+1.4
Southeast	7.7	15,523	7.3	15,425	-0.6
Northeast	27.8	56,045	28.8	60,855	+8.6
Midwest	20.5	41,328	19.8	41,837	+1.2
Canada	3.6	7,258	4.4	9,297	+28.1
Europe	13.8	27,820	13.1	27,680	-0.5
Other	5.1	10,282	5.8	12,255	+19.2
Total	**100.0**	**201,600**	**100.0**	**211,300**	**+4.8**

February 2019 Visitor Origins

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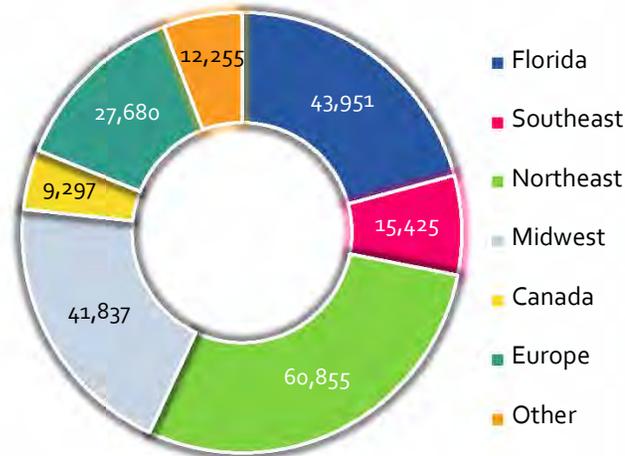
Naples, Marco Island, Everglades Visitor Profile | February 2019

Transportation Mode (Multiple Response)	February 2018	February 2019	
Plane	68.8%	70.4%	↑
Rental Car	62.9	64.0	↑
Personal Car	30.0	28.9	↓
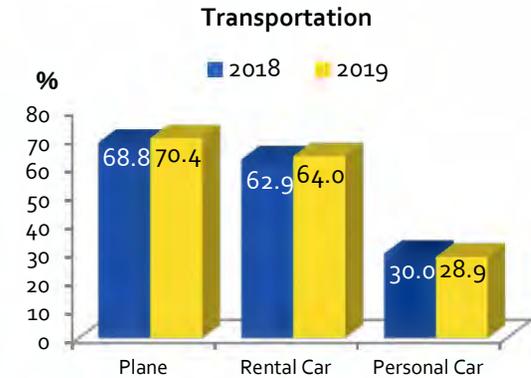
Airport Deplaned (Base: Flew)	February 2018	February 2019	
Southwest Florida International	65.6%	66.4%	↑
Miami International	16.8	15.0	↓
Ft. Lauderdale International	10.1	11.6	↑
Tampa International	4.4	4.2	↓
Orlando International/Sanford	2.4	2.2	↓
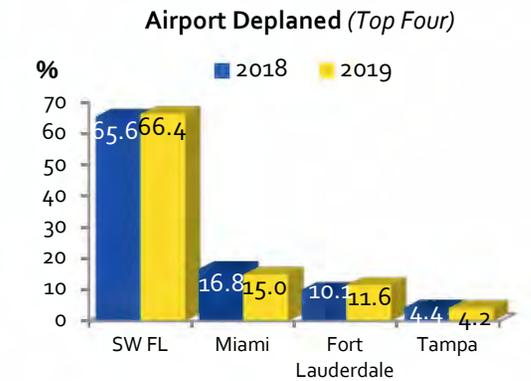
Purpose of Trip (Multiple Response)	February 2018	February 2019	
Vacation/Weekend Getaway	73.3%	71.3%	↓
Group Travel	37.0	40.5	↑
Visit with Friends and Relatives	14.2	12.5	↓
Special Event	5.1	6.7	↑

First Visit to (% yes)	February 2018	February 2019	
Collier County	33.5%	34.3%	↑
Florida	5.3	3.2	↓

Length of Stay (Days)	February 2018	February 2019	
In Collier County	4.3	4.1	↓

Party Size	February 2018	February 2019	
Number of People	2.7	2.6	↓

Transportation

Airport Deplaned (Top Four)

Length of Stay in Collier County (Days)

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Party Composition *(Multiple Response)*	February 2018	February 2019	
Couple	60.8%	61.7%	↑
Family	30.3	27.6	↓
Single	12.5	13.7	↑
Group of Friends	--	5.2	—
Group of Couples	5.8	4.3	↓

Party Composition *(Top Three)*
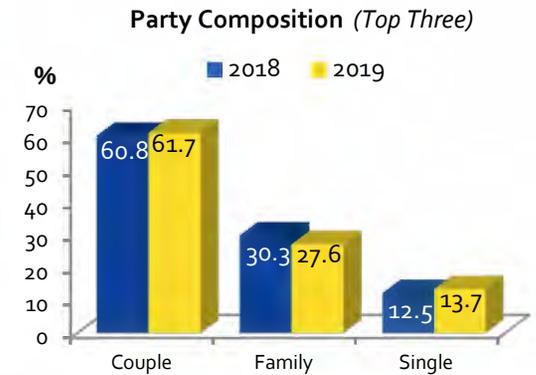
Did Party Have Lodging Reservations for Stay	February 2018	February 2019	
% Yes	94.7%	95.9%	↑

Expense Relative to Expectations	February 2018	February 2019	
More Expensive	21.5%	19.3%	↓
Less Expensive	1.8	1.5	↓
As Expected	75.4	77.2	↑

Satisfied/Recommend

Satisfaction with Collier County	February 2018	February 2019	
Very Satisfied	81.8%	84.7%	↑
Satisfied	15.7	12.0	↓
Satisfaction Level *(Combined)*	**97.5%**	**96.7%**	↓

Recommend Collier to Friends/Relatives	February 2018	February 2019	
% Yes	89.4%	88.4%	↓
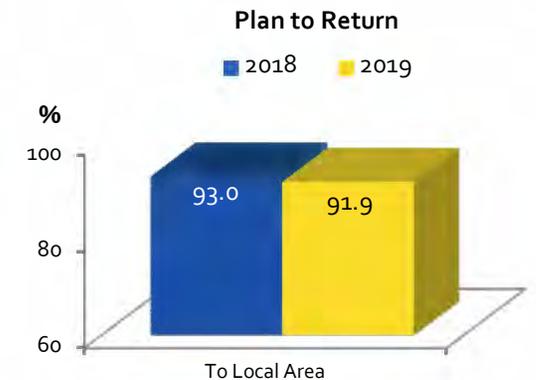
Plan to Return

Plan to Return *(% Yes)*	February 2018	February 2019	
To Local Area	93.0%	91.9%	↓

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Activities Enjoyed in Area *(Multiple Response)*	February 2018	February 2019	
Dining Out	74.5%	77.5%	↑
Beach	70.6	71.3	↑
Relaxing	67.4	66.3	↓
Shopping	49.1	51.4	↑
Pool	40.1	42.9	↑
Walking	33.4	29.6	↓
Enjoying Nature/Bird Watching/Everglades	29.6	27.1	↓
Sunsets	22.3	23.1	↑
Bars/Nightlife	19.8	21.1	↑
Reading	18.6	20.9	↑
Visiting with Friends/Relatives	22.8	20.8	↓
Art Galleries/Shows/Fairs	18.0	18.3	↑
Sunning	18.2	16.6	↓
Sightseeing	14.5	12.2	↓
Swimming	12.3	10.9	↓
Golfing	8.8	8.3	↓

Activities Enjoyed in Area *(Top Five)*

Legend: 2019 (yellow), 2018 (blue)

	2019	2018
Dining Out	77.5	74.5
Beach	71.3	70.6
Relaxing	66.3	67.4
Shopping	51.4	49.1
Pool	42.9	40.1

% 0 25 50 75 100
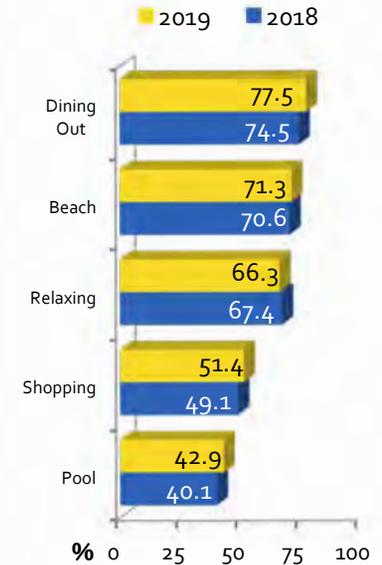
Demographics	February 2018	February 2019	
Average Age Head of Household *(Years)*	53.2	52.6	↓
Median Annual Household Income	$170,268	$173,987	↑
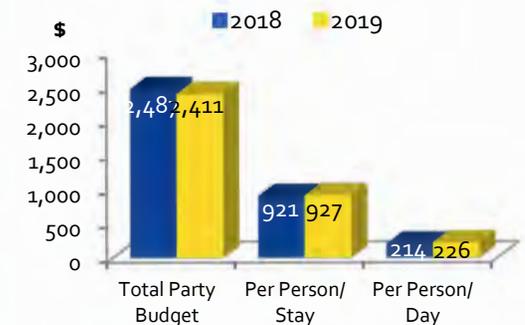
Collier Base Budget	February 2018	February 2019	
Total	$2,487.40	$2,411.08	↓
Per Person/Stay	921.26	927.34	↑
Per Person/Day	214.25	226.18	↑

Collier Base Budgets

Legend: 2018 (blue), 2019 (yellow)

	2018	2019
Total Party Budget	2,487	2,411
Per Person/Stay	921	927
Per Person/Day	214	226

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Area Information Seen/Read/Heard	February 2018	February 2019	
% Yes	56.1%	57.3%	↑

Directly Influenced by Information *(Base: Seen/Read/Heard Area Information)*	February 2018	February 2019	
% Yes	45.2%	43.2%	↓

Seen/Read/Heard
■ 2018 ■ 2019
56.1 57.3 % Yes

Info. Influenced
■ 2018 ■ 2019
45.2 43.2 % Yes

Why Chose the Area *(Multiple Response)*	February 2018	February 2019	
Weather	54.1%	53.4%	↓
Beach Area	50.9	48.7	↓
Business/Meeting/Conference	36.2	40.1	↑
Relaxing	42.1	37.7	↓
Previous Experience	35.9	33.9	↓
Restaurants	26.3	28.6	↑
Outdoor Recreation/Nature	29.8	28.3	↓
Quiet/Peaceful/Laid Back	30.8	28.1	↓
Quality of Accommodations	23.6	25.0	↑
Never Been	22.6	23.5	↑
Appealing Brochures/Websites	19.7	22.5	↑
Recommendation	24.2	22.3	↓
Not Crowded	13.0	10.5	↓

Internet Use
■ 2018 ■ 2019
96.1 95.5 Use Web for Travel Info This Trip
76.5 77.3 Book Reserv for Trip Online

Internet Use	February 2018	February 2019	
Use Internet to Obtain Travel Info for This Trip *(% Yes)*	96.1%	95.5%	↓
Book Reservations for Trip Online *(%Yes)*	76.5	77.3	↑

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Industry Data:

2015 - 2019

NAPLES
MARCO ISLAND
EVERGLADES
FLORIDA'S PARADISE COAST

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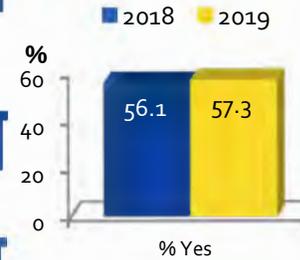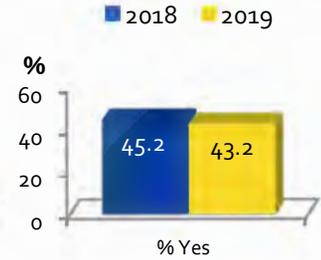
Collier Direct Leisure and Hospitality Employment *(Calendar Year)* *

	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
2019	31,800	32,300										
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.)

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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 to date: 2.17 million (+7.3%)

RSW Total Passenger Traffic
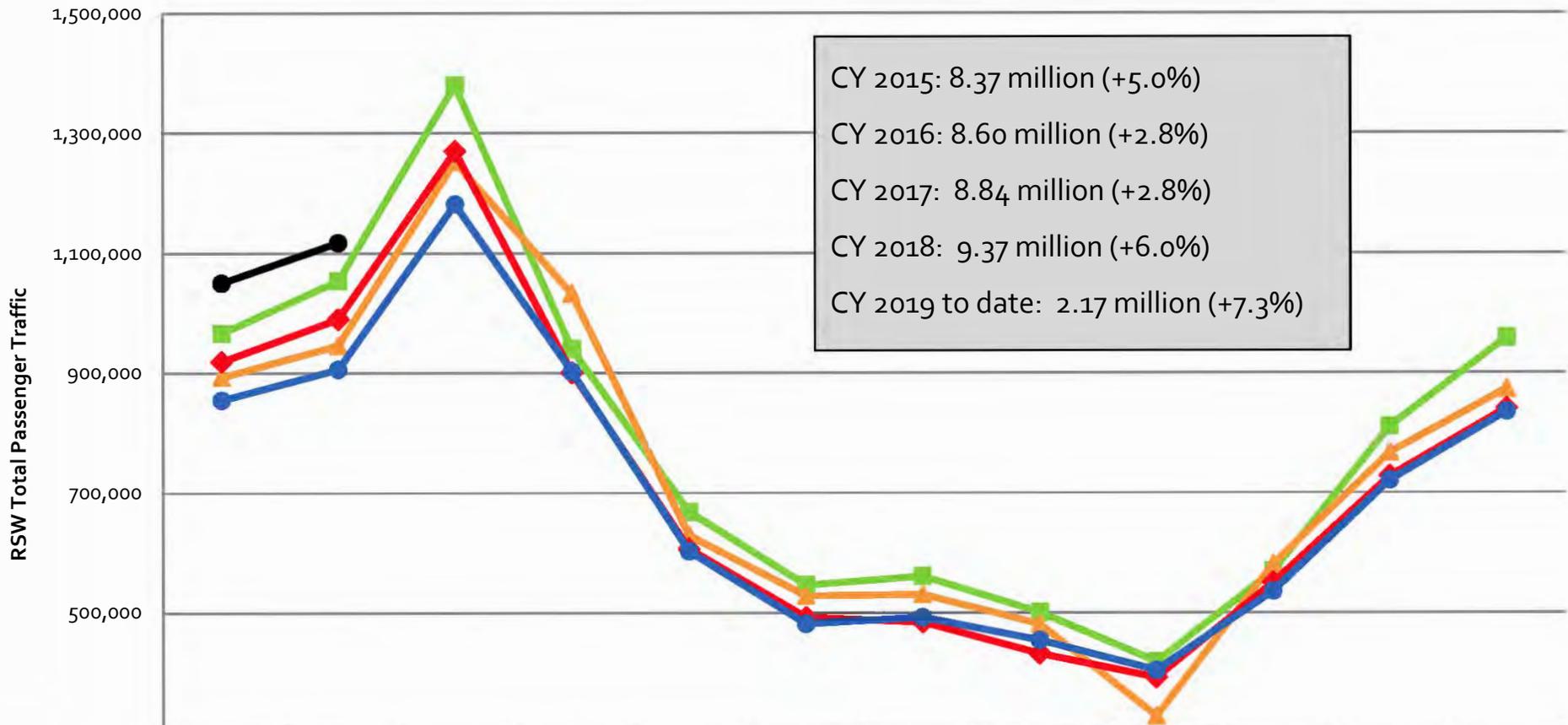
	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
2019	1,050,093	1,117,409										
2018	965,981	1,053,817	1,379,728	939,957	668,665	546,159	561,039	501,023	418,256	569,553	810,283	958,717
2017	892,905	946,079	1,252,124	1,032,783	629,321	528,383	530,428	481,185	327,466	581,317	767,064	873,494
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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