Naples, Marco Island, Everglades Convention and Visitors Bureau

January 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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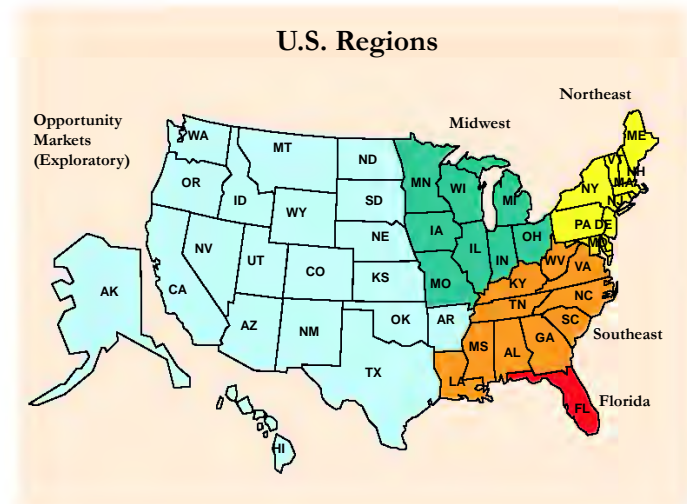
February 2019

Executive Summary: *January 2019*

1. This January, some **191,000** visitors stayed in Collier's commercial lodgings **(+2.6%)***. Their visits contributed an estimated **$193,839,100** of economic impact to the County **(+7.6%)**. Key performance metrics are as follows:

January	2018	2019**	% Δ
Occupancy	83.4%	79.4%	-4.8%
ADR	$248.3	$259.1	+4.3%
RevPAR	$207.1	$205.7	-0.7%

* Available records suggest that approximately 90 Collier lodging units remained closed in January 2019. (January 2018: 660 units)

Additionally, approximately 100 new units were added to Collier's rental pool since last January.

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

January Visitation	2019 Visitor #	Δ
Florida	58,446	+1.0
Southeast	11,842	-0.6
Northeast	52,716	+6.5
Midwest	29,796	-5.8
Canada	4,202	-32.8
Europe	26,358	+13.3
Other	7,640	-12.7
Total	**191,000**	**+2.6**

U.S. Regions

3. Compared to last January, almost half **(40.3%)** of Collier lodging managers report their three month forward reservations levels as "up" *(2018: 62.5%)*.

% of Properties (January) Reporting Reservations:	2018	2019
Up	62.5%	40.3%
Same	33.3	29.4
Down	4.2	30.3

4. This January, two-thirds of the destination's visitor parties flew *(2018: 63.5%; 2019: 67.1%)*. A majority of these **(69.1%)** deplaned at RSW, with Miami capturing some **13.8%** of deplanements.

5. This January, visitor party size averaged **2.4** travelers who stayed for **3.0 nights** in the Naples, Marco Island, Everglades area *(2018: 2.4 people; 3.1 nights)*.

6. Some **41.8%** of Collier's January visitors are in the destination for the first time.

7. Fully **93.8%** consult the web for trip information, with some **80.0%** making bookings for their trip online.

8. The majority **(94.7%)** are satisfied with their Collier stay, with **92.3%** planning a future trip to the area.

9. The typical January visitor is **52.3 years of age**.

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# Naples, Marco Island, Everglades:

January 2019 Visitor Profile

Naples, Marco Island, Everglades Visitor Profile | January 2019

| H/M/C+ Visitor Statistics | Calendar Year (January – December) | | % Δ '17/'18 | January | | % Δ '18/'19 |
	2017	2018		2018	2019*	
Visitors (#)	1,774,800	1,823,300	+2.7	186,100	191,000	+2.6
Room Nights	2,364,300	2,380,700	+0.7	232,700	238,000	+2.3
Direct Exp. ($)	$1,373,918,000	$1,436,686,500	+4.6	$120,853,300	$130,006,100	+7.6
Total Eco. Impact ($)	$2,048,511,800	$2,142,099,700	+4.6	$180,192,300	$193,839,100	+7.6

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

January Occupancy

January Room Rates

January Economic Impact
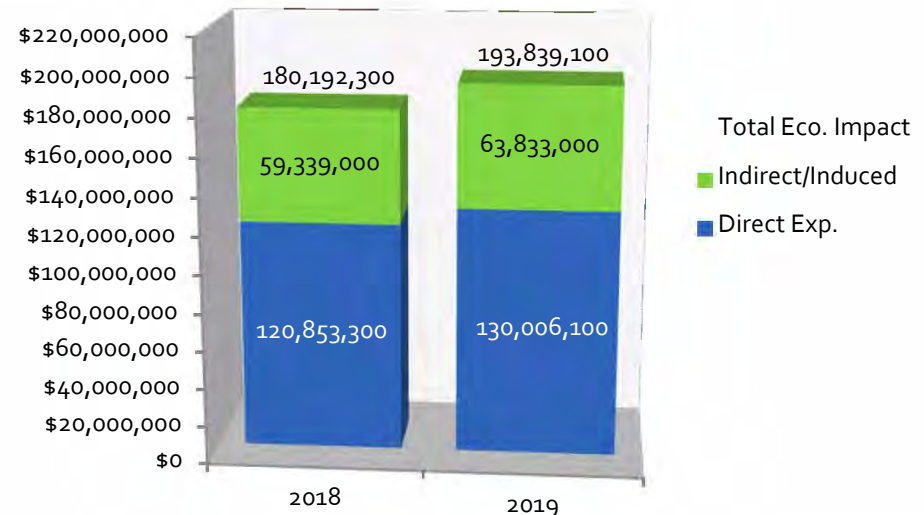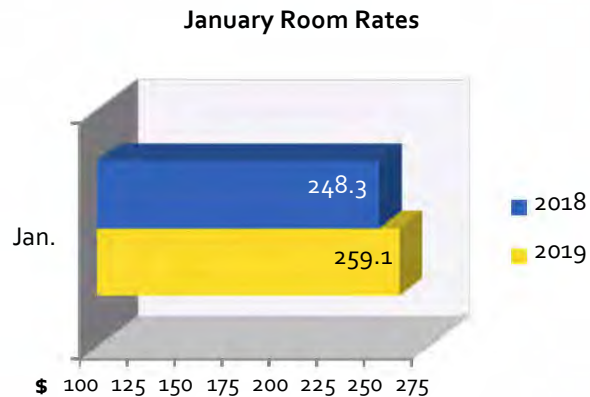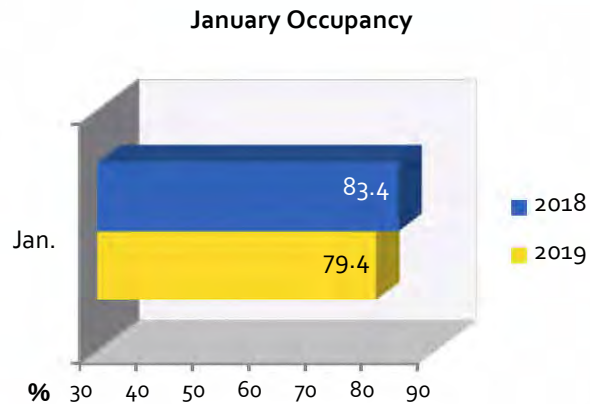
January

Lodging Statistics	2018	2019**	% Δ '18/'19
Occupancy	83.4%	79.4%	-4.8
Room Rates	$248.3	$259.1	+4.3
RevPAR	$207.1	$205.7	-0.7

** Note: Available records suggest that approximately 90 Collier lodging units remained closed in January 2019. (January 2018: 660 units). Additionally, approximately 100 new units were added to Collier's rental pool since last January.

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January 2019 Visitor Origin Markets

Visitor Origins	2018		2019		% Δ '18/'19
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	31.1%	57,877	30.6%	58,446	+1.0
Southeast	6.4	11,910	6.2	11,842	-0.6
Northeast	26.6	49,503	27.6	52,716	+6.5
Midwest	17.0	31,637	15.6	29,796	-5.8
Canada	1.7	3,164	2.2	4,202	+32.8
Europe	12.5	23,262	13.8	26,358	+13.3
Other	4.7	8,747	4.0	7,640	-12.7
Total	**100.0**	**186,100**	**100.0**	**191,000**	**+2.6**

January 2019 Visitor Origins

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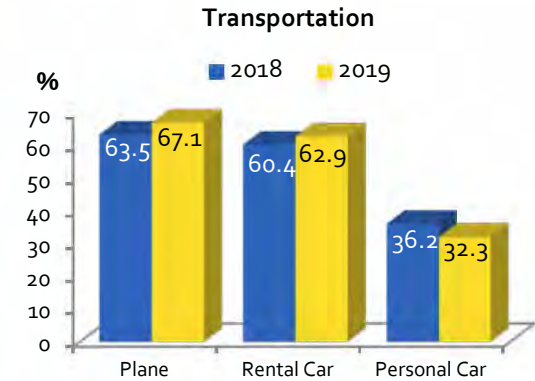- Midwest
- Canada
- Europe
- Other

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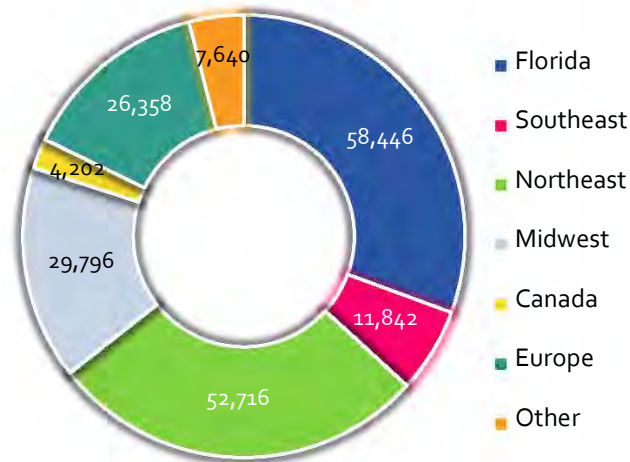
Naples, Marco Island, Everglades Visitor Profile | January 2019

Transportation Mode *(Multiple Response)*

	January 2018	January 2019	
Plane	63.5%	67.1%	▲
Rental Car	60.4	62.9	▲
Personal Car	36.2	32.3	▼

Airport Deplaned *(Base: Flew)*

	January 2018	January 2019	
Southwest Florida International	68.4%	69.1%	▲
Miami International	12.8	13.8	▲
Ft. Lauderdale International	7.7	8.2	▲
Orlando International/Sanford	5.8	5.0	▼
Tampa International	4.7	3.4	▼
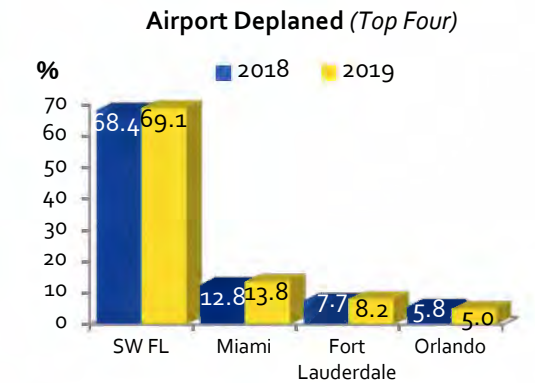
Purpose of Trip *(Multiple Response)*

	January 2018	January 2019	
Vacation/Weekend Getaway	74.3%	72.7%	▼
Group Travel	37.4	39.2	▲
Visit with Friends and Relatives	12.5	11.6	▼
Special Event	9.1	10.6	▲

First Visit to *(% yes)*

	January 2018	January 2019	
Collier County	39.9%	41.8%	▲
Florida	5.0	5.8	▲

Length of Stay *(Days)*

	January 2018	January 2019	
In Collier County	4.1	4.0	▼

Party Size

	January 2018	January 2019	
Number of People	2.4	2.4	▬

Transportation

Airport Deplaned *(Top Four)*

Length of Stay in Collier County *(Days)*

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Party Composition *(Multiple Response)*

	January 2018	January 2019	
Couple	61.6%	64.4%	↑
Family	23.2	21.6	↓
Single	14.3	15.6	↑
Extended Family	4.4	5.1	↑
Group of Friends	1.7	2.4	↑

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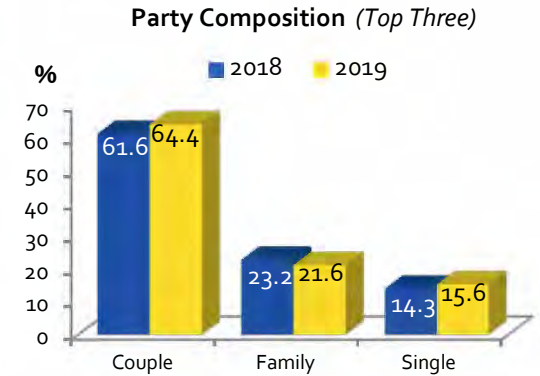
Did Party Have Lodging Reservations for Stay

	January 2018	January 2019	
% Yes	93.8%	95.8%	↑
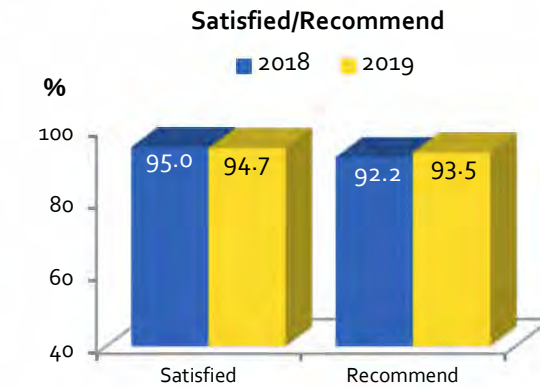
Expense Relative to Expectations

	January 2018	January 2019	
More Expensive	22.9%	19.1%	↓
Less Expensive	1.3	2.5	↑
As Expected	66.5	70.4	↑

Satisfied/Recommend
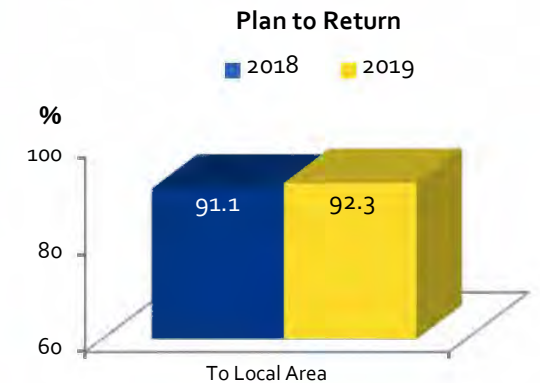
Satisfaction with Collier County

	January 2018	January 2019	
Very Satisfied	91.0%	91.7%	↑
Satisfied	4.0	3.0	↓
Satisfaction Level *(Combined)*	**95.0%**	**94.7%**	↓

Recommend Collier to Friends/Relatives

	January 2018	January 2019	
% Yes	92.2%	93.5%	↑

Plan to Return

Plan to Return *(% Yes)*

	January 2018	January 2019	
To Local Area	91.1%	92.3%	↑

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Activities Enjoyed in Area *(Multiple Response)*

	January 2018	January 2019	
Dining Out	79.1%	79.7%	↑
Beach	67.9	71.2	↑
Relaxing	52.6	50.3	↓
Shopping	43.5	47.1	↑
Pool	42.8	46.4	↑
Sunsets	28.4	31.0	↑
Reading	25.0	27.1	↑
Walking	26.0	24.8	↓
Art Galleries/Shows/Fairs	20.8	22.9	↑
Visiting with Friends/Relatives	23.3	22.8	↓
Sunning	24.8	22.3	↓
Sightseeing	22.3	20.8	↓
Enjoying Nature/Bird Watching/Everglades	21.0	19.2	↓
Bars/Nightlife	17.4	18.8	↑
Swimming	12.5	13.8	↑
Museums	16.9	11.4	↓
Golfing	10.7	11.1	↑

Activities Enjoyed in Area *(Top Five)*

2019 ■ **2018**

	2019	2018
Dining Out	79.7	79.1
Beach	71.2	67.9
Relaxing	50.3	52.6
Shopping	47.1	43.5
Pool	46.4	42.8

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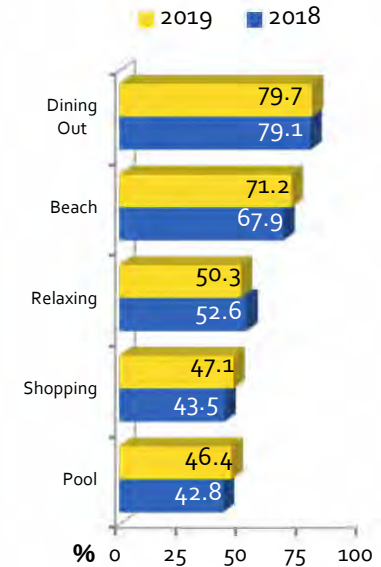
Demographics

	January 2018	January 2019	
Average Age Head of Household *(Years)*	51.8	52.3	↑
Median Annual Household Income	$154,514	$156,289	↑

Collier Base Budget

	January 2018	January 2019	
Total	$1,558.56	$1,633.58	↓
Per Person/Stay	649.40	680.66	↑
Per Person/Day	158.39	170.16	↑

Collier Base Budgets

■ 2018 ■ 2019

$

	2018	2019
Total Party Budget	1,559	1,634
Per Person/ Stay	649	681
Per Person/ Day	158	170

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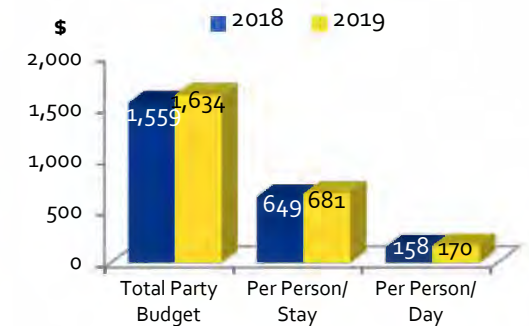
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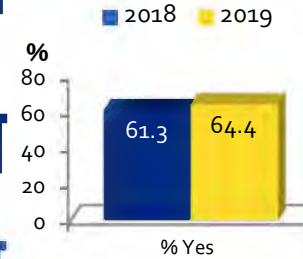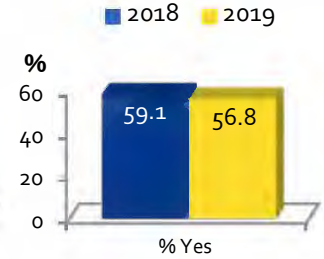| Area Information Seen/Read/Heard	January 2018	January 2019	
% Yes	61.3%	64.4%	↑

Directly Influenced by Information _(Base: Seen/Read/Heard Area Information)_	January 2018	January 2019	
% Yes	59.1%	56.8%	↓

Why Chose the Area _(Multiple Response)_	January 2018	January 2019	
Beach Area	53.7%	50.2%	↓
Weather	50.5	47.8	↓
Business/Meeting/Conference	35.6	38.3	↑
Quiet/Peaceful/Laid Back	36.2	37.0	↑
Relaxing	35.0	33.2	↓
Previous Experience	33.6	32.4	↓
Outdoor Recreation/Nature	30.9	30.4	↓
Restaurants	26.4	29.4	↑
Never Been	27.4	27.8	↑
Quality of Accommodations	20.9	26.8	↑
Appealing Brochures/Websites	25.4	26.4	↑
Not Crowded	24.1	21.4	↓
Recommendation	22.6	20.3	↓

Internet Use	January 2018	January 2019	
Use Internet to Obtain Travel Info for This Trip _(% Yes)_	92.9%	93.8%	↑
Book Reservations for Trip Online _(%Yes)_	79.1	80.0	↑

Seen/Read/Heard
■ 2018 ■ 2019
61.3 64.4
% Yes

Info. Influenced
■ 2018 ■ 2019
59.1 56.8
% Yes

Internet Use
■ 2018 ■ 2019
Use Web for Travel Info This Trip: 92.9 93.8
Book Reserv for Trip Online: 79.1 80.0

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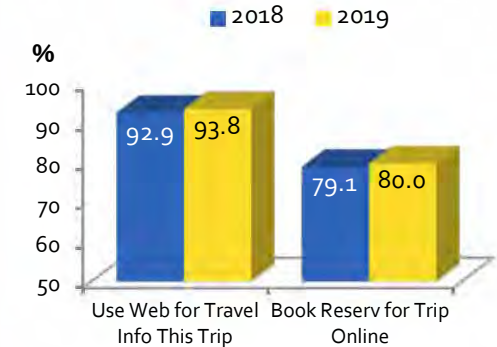
Industry Data:

2015 - 2019

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

	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
2019												
2018	28,900	29,400	29,800	29,300	28,200	27,200	26,500	26,300	26,300	27,200	28,400	28,900
2017	30,300	30,700	31,100	30,400	28,800	27,000	25,800	25,700	23,300	25,200	27,400	28,200
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
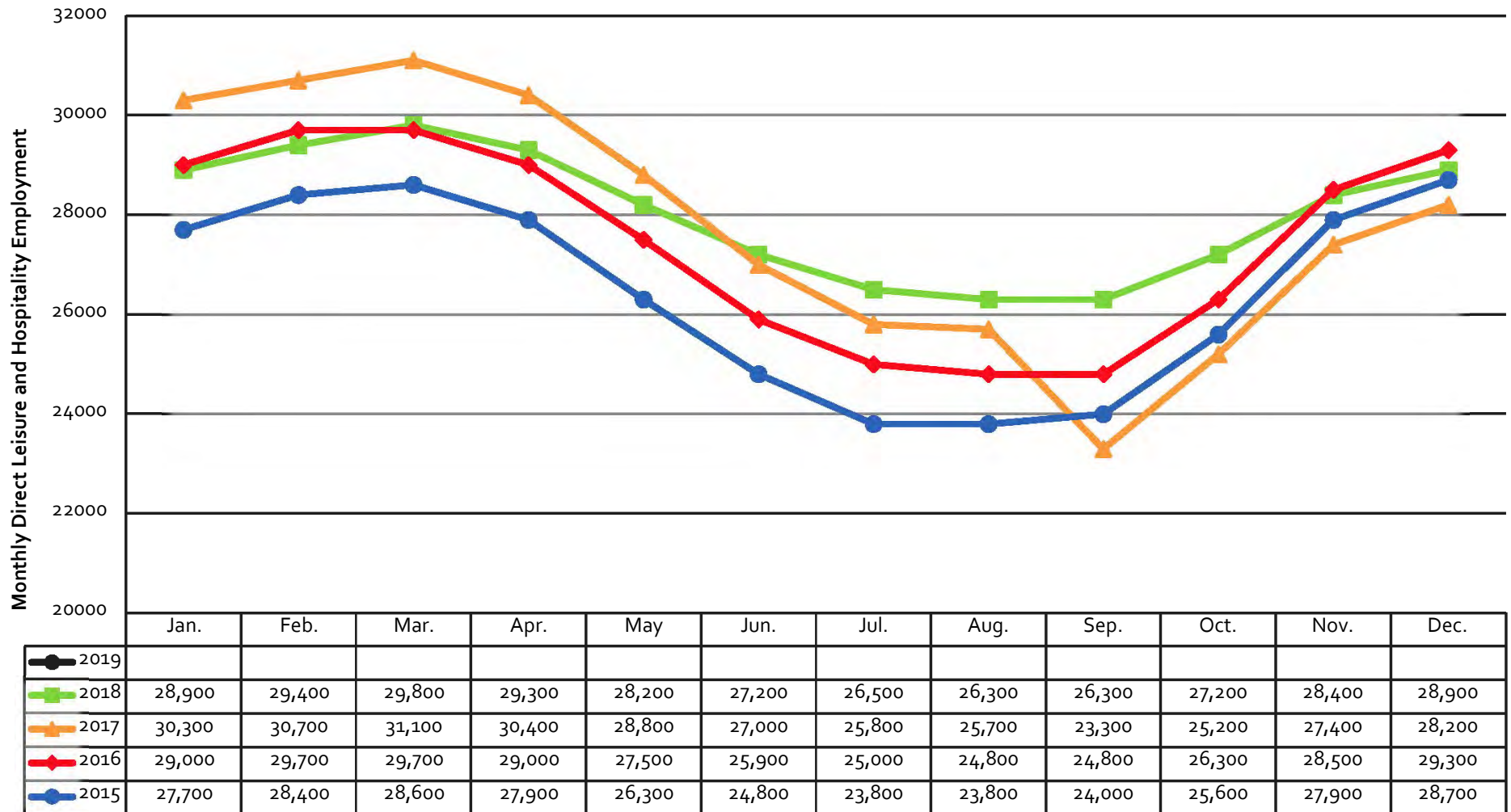
* Source: Florida Department of Economic Opportunity/U.S. Department of Labor.

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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: 1.05 million (+8.7%)
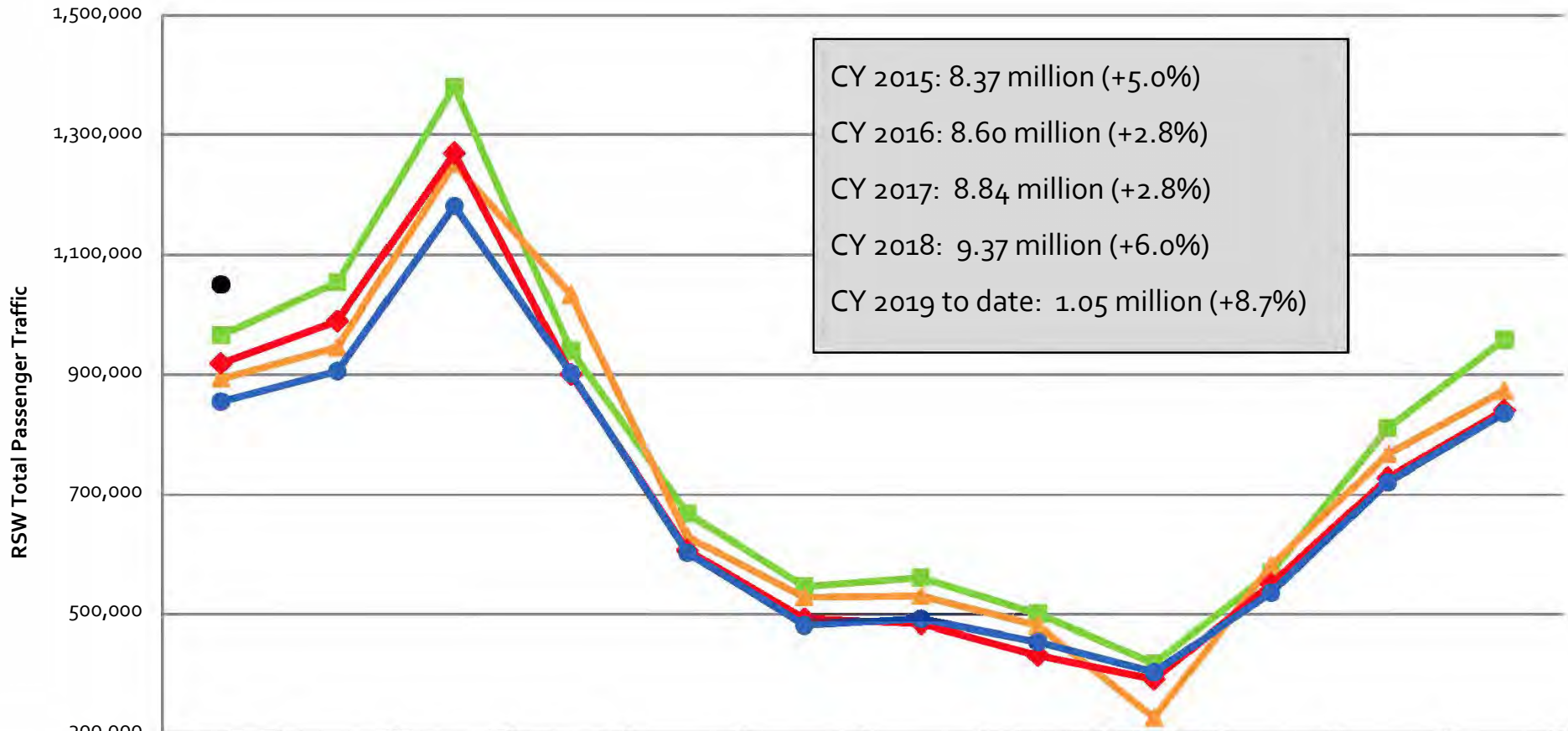
	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
2019	1,050,093											
2018	965,981	1,053,817	1,379,728	939,957	668,665	546,159	561,039	501,023	418,256	569,553	810,283	958,717
2017	892,905	946,079	1,252,124	1,032,783	629,321	528,383	530,428	481,185	327,466	581,317	767,064	873,494
2016	918,929	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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