Naples, Marco Island, Everglades Convention and Visitors Bureau

March 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
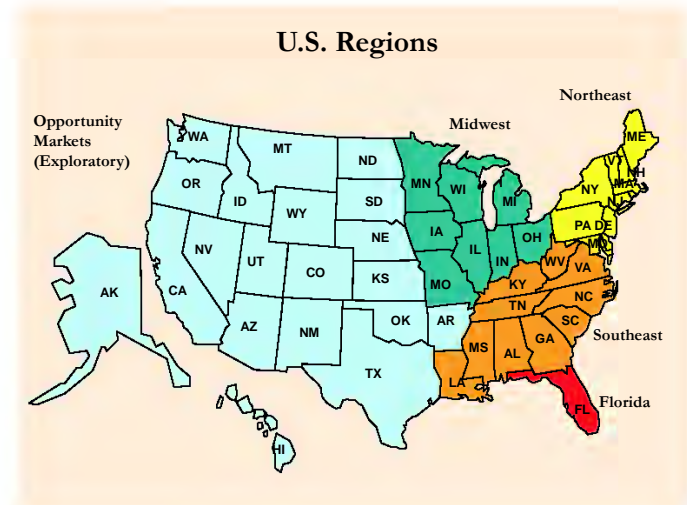
April 2019

Executive Summary: *March 2019*

1. This March, some **243,100** visitors stayed in Collier's commercial lodgings **(+4.2%)***. Their visits contributed an estimated **$369,276,400** of economic impact to the County **(+5.8%)**. Key performance metrics are as follows:

March	2018	2019**	% Δ
Occupancy	91.1%	91.6%	+0.5%
ADR	$372.0	$359.9	-3.3%
RevPAR	$338.9	$329.7	-2.7%

* Available records suggest that approximately 15 Collier lodging units remained closed in March 2019. (March 2018: 660 units)

Additionally, approximately 113 new units were added to Collier's rental pool since last March.

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

March Visitation	2019 Visitor #	Δ
Florida	55,183	+10.0
Southeast	14,100	-2.5
Northeast	69,770	+2.4
Midwest	52,996	+7.1
Canada	6,807	+45.9
Europe	34,277	-8.2
Other	9,967	+9.5
Total	**243,100**	**+4.2**

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3. Compared to last March, **37.9%** of Collier lodging managers report their three month forward reservations levels as "up."

% of Properties (March) Reporting Reservations:	2018	2019
Up	51.7%	37.9%
Same	37.9	41.4
Down	10.3	20.7

4. This March, seven out of ten of the destination's visitors flew *(2018: 76.8%; 2019: 76.3%).* A majority of these **(63.1%)** deplaned at RSW, with Miami capturing some **11.3%** of deplanements.

5. This March, visitor party size averaged **2.7** travelers who stayed for **3.3 nights** in the Naples, Marco Island, Everglades area *(2018: 2.9 people; 3.4 nights).*

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

7. Fully **93.7%** consult the web for trip information, with some **78.2%** making bookings for their trip online.

8. The majority **(96.3%)** are satisfied with their Collier stay, with **92.7%** planning a future trip to the area.

9. The typical March visitor is **52.9 years of age**.

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Naples, Marco Island, Everglades:
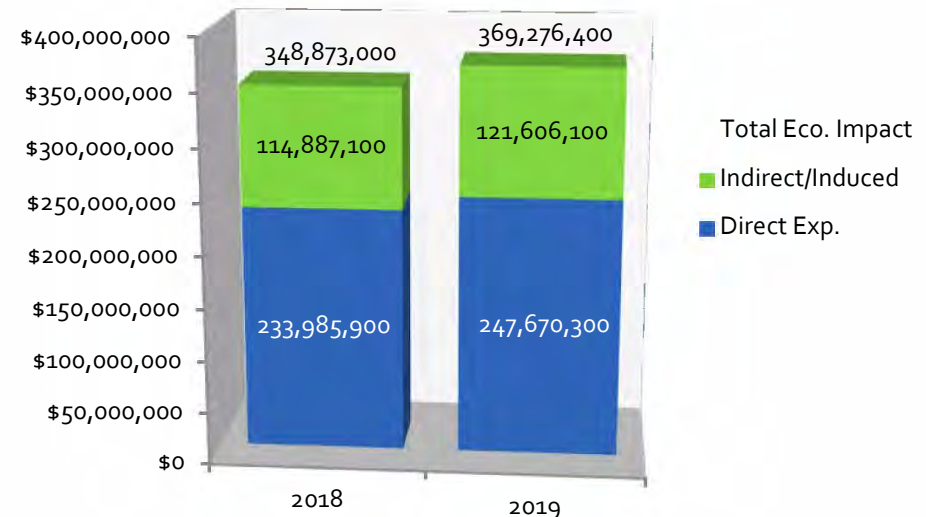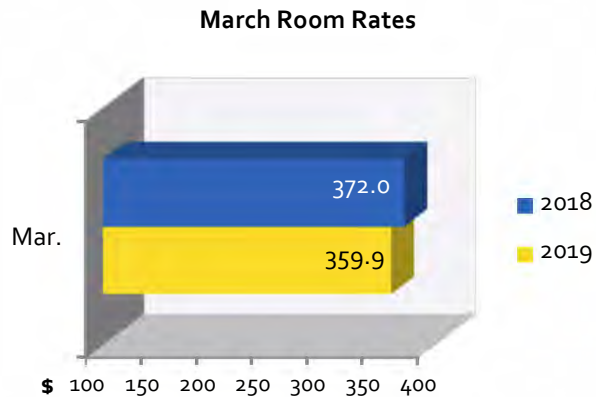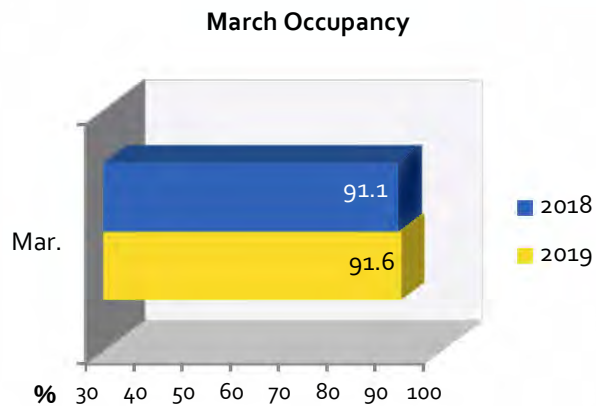*March 2019 Visitor Profile*

Naples, Marco Island, Everglades Visitor Profile | March 2019

H/M/C+ Visitor Statistics	Year to Date (January – March)		% Δ	March		% Δ
	2018	2019	'18/'19	2018	2019**	'18/'19
Visitors (#)	621,000	645,400	+3.9	233,300	243,100	+4.2
Room Nights	744,600	782,400	+5.1	265,500	284,000	+7.0
Direct Exp. ($)	$540,565,200	$573,623,300	+6.1	$233,985,900	$247,670,300	+5.8
Total Eco. Impact ($)	$805,982,800	$855,272,300	+6.1	$348,873,000	$369,276,400	+5.8

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

March Occupancy

Mar.
- 2018: 91.1
- 2019: 91.6

% 30 40 50 60 70 80 90 100

March Room Rates

Mar.
- 2018: 372.0
- 2019: 359.9

$ 100 150 200 250 300 350 400

March Economic Impact

	2018	2019
Indirect/Induced	114,887,100	121,606,100
Direct Exp.	233,985,900	247,670,300
Total Eco. Impact	348,873,000	369,276,400

March

Lodging Statistics	2018	2019**	% Δ '18/'19
Occupancy	91.1%	91.6%	+0.5
Room Rates	$372.0	$359.9	-3.3
RevPAR	$338.9	$329.7	-2.7

*** Note: Available records suggest that approximately 15 Collier lodging units remained closed in March 2019. (March 2018: 660 units). Additionally, approximately 113 new units were added to Collier's rental pool since last March.*

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March 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%	50,159	22.7%	55,183	+10.0
Southeast	6.2	14,464	5.8	14,100	-2.5
Northeast	29.2	68,124	28.7	69,770	+2.4
Midwest	21.2	49,460	21.8	52,996	+7.1
Canada	2.0	4,666	2.8	6,807	+45.9
Europe	16.0	37,328	14.1	34,277	-8.2
Other	3.9	9,099	4.1	9,967	+9.5
Total	**100.0**	**233,300**	**100.0**	**243,100**	**+4.2**

March 2019 Visitor Origins

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

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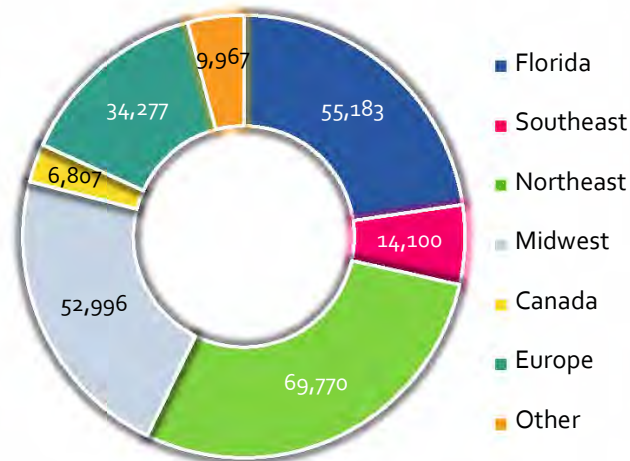
Naples, Marco Island, Everglades Visitor Profile | March 2019

Transportation Mode *(Multiple Response)*

	March 2018	March 2019	
Plane	76.8%	76.3%	↓
Rental Car	67.3	65.6	↓
Personal Car	23.2	23.7	↑

Airport Deplaned *(Base: Flew)*

	March 2018	March 2019	
Southwest Florida International	60.5%	63.1%	↑
Miami International	14.3	11.3	↓
Ft. Lauderdale International	7.9	8.5	↑
Orlando International/Sanford	9.2	7.8	↓
Tampa International	5.3	4.8	↓

Purpose of Trip *(Multiple Response)*

	March 2018	March 2019	
Vacation/Weekend Getaway	84.2%	83.6%	↓
Group Travel	21.9	25.9	↑
Visit with Friends and Relatives	12.8	12.0	↓
Special Event	--	5.7	—

First Visit to *(% yes)*

	March 2018	March 2019	
Collier County	42.6%	41.8%	↓
Florida	4.3	3.6	↓

Length of Stay *(Days)*

	March 2018	March 2019	
In Collier County	4.4	4.3	↓

Party Size

	March 2018	March 2019	
Number of People	2.9	2.7	↓

Transportation

Airport Deplaned *(Top Four)*

Length of Stay in Collier County *(Days)*

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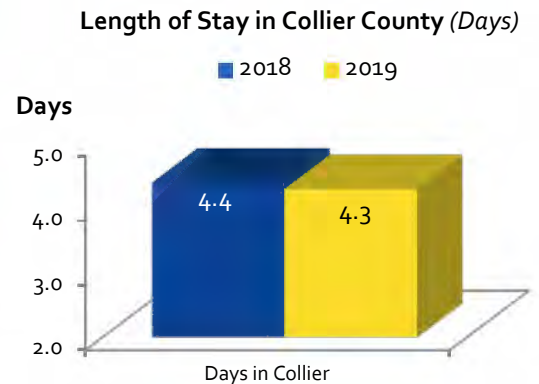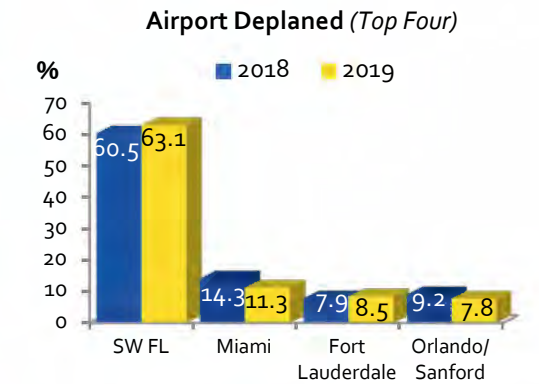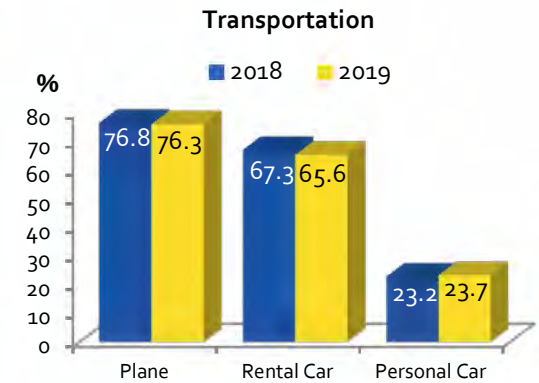
Naples, Marco Island, Everglades Visitor Profile | March 2019

Party Composition *(Multiple Response)*	March 2018	March 2019	
Couple	60.7%	59.6%	↓
Family	34.8	32.6	↓
Single	4.6	6.9	↑
Group of Friends	5.5	4.3	↓
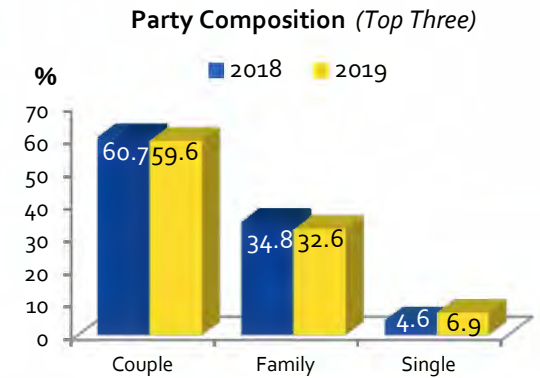
Did Party Have Lodging Reservations for Stay	March 2018	March 2019	
% Yes	97.9%	98.6%	↑

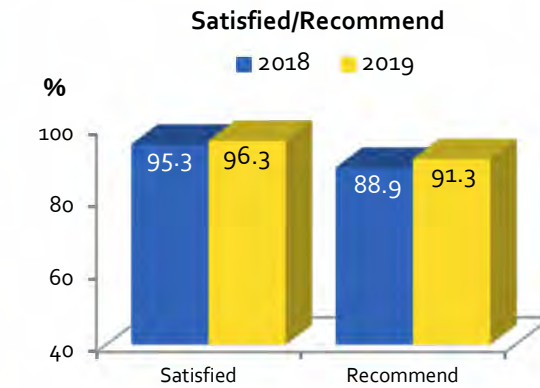| Expense Relative to Expectations	March 2018	March 2019	
More Expensive	27.2%	22.8%	↓
Less Expensive	1.4	2.9	↑
As Expected	68.8	71.5	↑

Satisfaction with Collier County	March 2018	March 2019	
Very Satisfied	83.0%	84.4%	↑
Satisfied	12.3	11.9	↓
Satisfaction Level *(Combined)*	**95.3%**	**96.3%**	↑
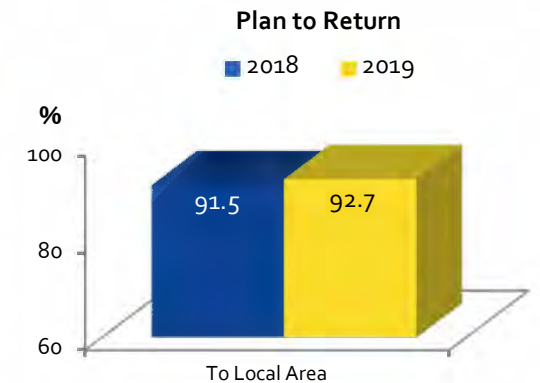
Recommend Collier to Friends/Relatives	March 2018	March 2019	
% Yes	88.9%	91.3%	↑

Plan to Return *(% Yes)*	March 2018	March 2019	
To Local Area	91.5%	92.7%	↑

Party Composition *(Top Three)*

Legend: ■ 2018 ■ 2019

Couple: 60.7 / 59.6
Family: 34.8 / 32.6
Single: 4.6 / 6.9

Satisfied/Recommend

Legend: ■ 2018 ■ 2019

Satisfied: 95.3 / 96.3
Recommend: 88.9 / 91.3

Plan to Return

Legend: ■ 2018 ■ 2019

To Local Area: 91.5 / 92.7

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Activities Enjoyed in Area *(Multiple Response)*

	March 2018	March 2019	
Dining Out	80.0%	82.2%	▲
Beach	78.2	76.4	▼
Relaxing	76.4	73.6	▼
Pool	58.2	55.8	▼
Shopping	50.9	52.4	▲
Reading	29.3	31.9	▲
Swimming	33.1	31.2	▼
Sightseeing	30.1	29.1	▼
Enjoying Nature/Bird Watching/Everglades	22.4	27.8	▲
Walking	26.4	27.6	▲
Sunsets	25.0	27.2	▲
Bars/Nightlife	23.6	24.4	▲
Sunning	23.6	22.4	▼
Visiting with Friends/Relatives	20.0	17.1	▼
Art Galleries/Shows/Fairs	18.2	16.3	▼
Shelling	14.8	14.3	▼
Golfing	8.5	8.0	▼

Activities Enjoyed in Area *(Top Five)*

Legend: 2019 (yellow), 2018 (blue)

	2019	2018
Dining Out	82.2	80.0
Beach	76.4	78.2
Relaxing	73.6	76.4
Pool	55.8	58.2
Shopping	52.4	50.9
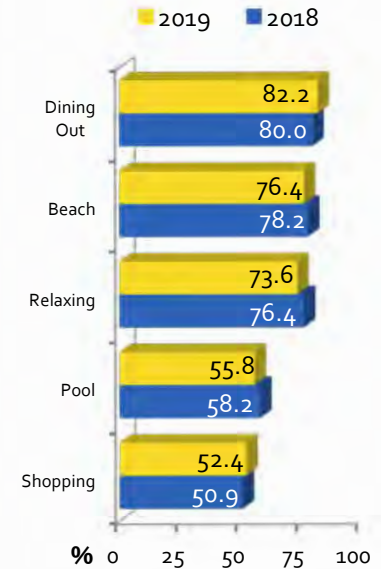
Demographics

	March 2018	March 2019	
Average Age Head of Household *(Years)*	52.6	52.9	▲
Median Annual Household Income	$177,932	$179,814	▲
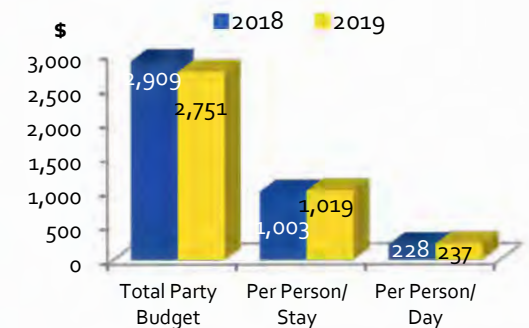
Collier Base Budget

	March 2018	March 2019	
Total	$2,908.54	$2,750.77	▼
Per Person/Stay	1,002.94	1,018.80	▲
Per Person/Day	227.94	236.93	▲

Collier Base Budgets

Legend: 2018 (blue), 2019 (yellow)

	2018	2019
Total Party Budget	2,909	2,751
Per Person/Stay	1,003	1,019
Per Person/Day	228	237

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Area Information Seen/Read/Heard	March 2018	March 2019	
% Yes	50.9%	52.1%	↑

Seen/Read/Heard
■2018 ■2019

50.9 52.1
% Yes

Info. Influenced
■2018 ■2019

53.2 54.3
% Yes

| Directly Influenced by Information (Base: Seen/Read/Heard Area Information)	March 2018	March 2019	
% Yes	53.2%	54.3%	↑

Why Chose the Area (Multiple Response)	March 2018	March 2019	
Beach Area	54.5%	53.0%	↓
Weather	49.1	51.4	↑
Previous Experience	34.3	37.9	↑
Relaxing	32.7	30.4	↓
Restaurants	29.0	29.6	↑
Quality of Accommodations	27.3	28.3	↑
Appealing Brochures/Websites	26.8	27.1	↑
Outdoor Recreation/Nature	25.4	26.1	↑
Quiet/Peaceful/Laid Back	29.1	25.6	↓
Business/Meeting/Conference	22.6	24.3	↑
Recommendation	28.8	23.5	↓
Never Been	21.8	21.0	↓
Not Crowded	15.8	12.7	↓

Internet Use
■2018 ■2019

95.4 93.7
79.4 78.2
Use Web for Travel Info This Trip   Book Reserv for Trip Online

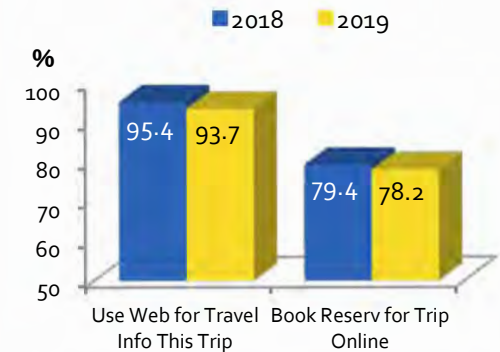| Internet Use	March 2018	March 2019	
Use Internet to Obtain Travel Info for This Trip (% Yes)	95.4%	93.7%	↓
Book Reservations for Trip Online (%Yes)	79.4	78.2	↓

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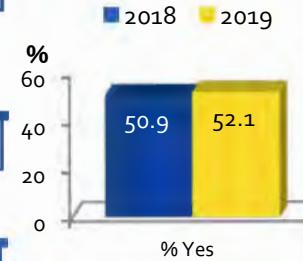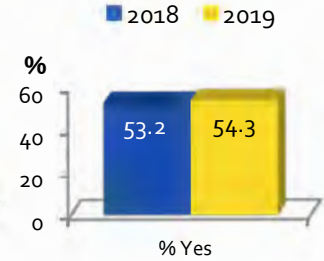
Industry Data:

2015 - 2019

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

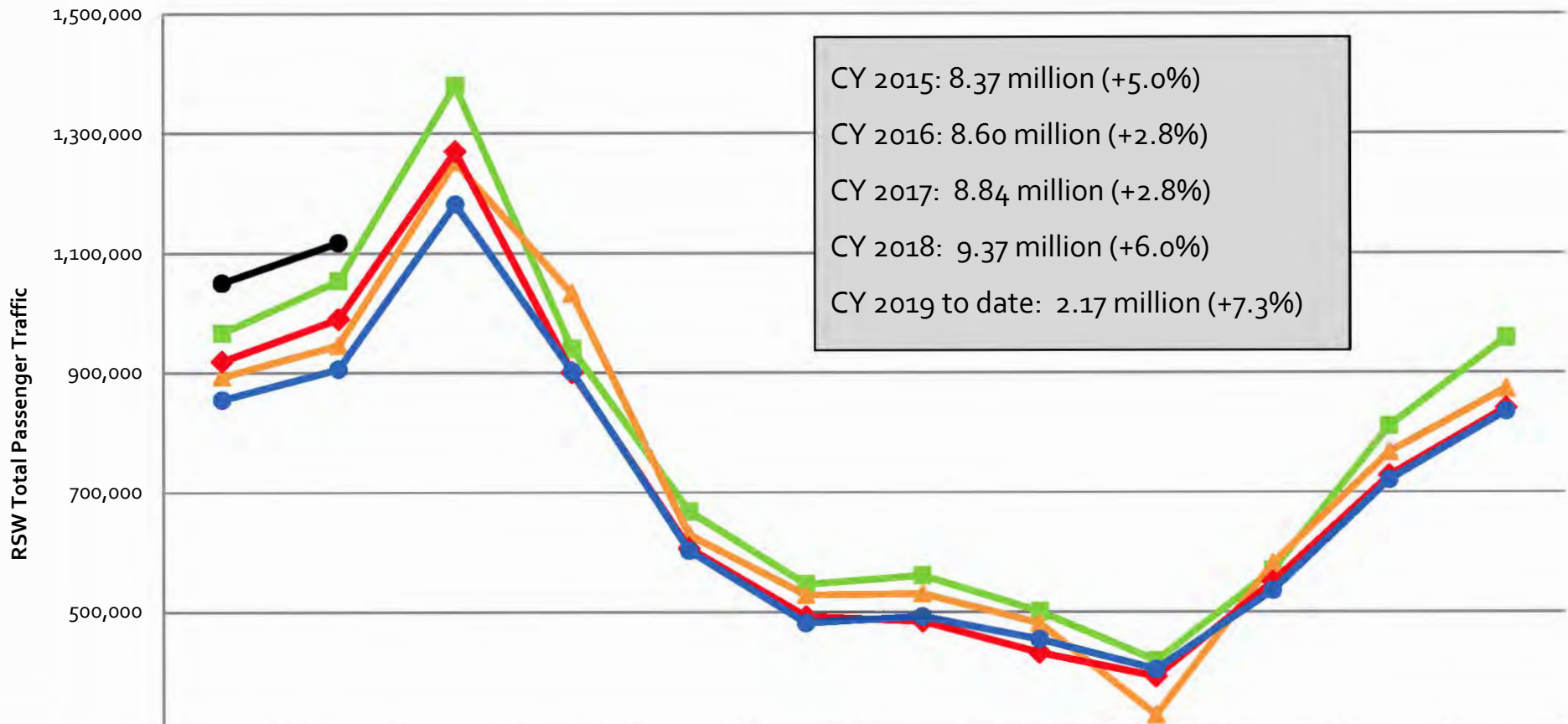|	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
2019	31,800	32,300										
2018	30,700	31,600	31,700	30,500	29,100	27,500	26,600	26,500	26,300	27,500	29,500	30,700
2017	30,300	30,700	31,100	30,400	28,700	27,000	25,800	25,900	23,400	26,700	29,200	30,300
2016	29,000	29,700	29,700	29,000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

	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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