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Naples, Marco Island, Everglades Convention and Visitors Bureau
May 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

June 2019

Naples, Marco Island, Everglades: May 2019 Summary

Executive Summary: May 2019

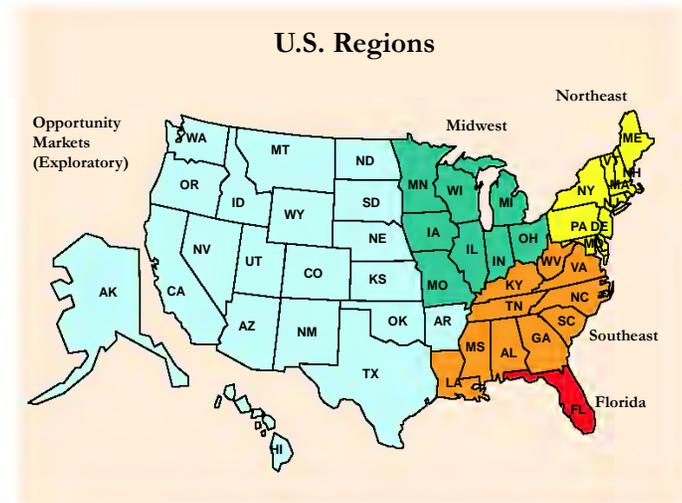
- This May, some **146,400** visitors stayed in Collier's commercial lodgings **(+6.3%)***. Their visits contributed an estimated **\$188,286,000** of economic impact to the County **(+8.9%)**. Key performance metrics are as follows:

<u>May</u>	<u>2018</u>	<u>2019</u>	<u>% Δ</u>
Occupancy	71.0%	72.4%	+2.0%
ADR	\$232.0	\$230.0	-0.9%
RevPAR	\$164.7	\$166.5	+1.1%

* Available records suggest that approximately 15 Collier lodging units remained closed in May 2019. (May 2018: 650 units)

- Collier's May visitation originates from the following primary market segments:

<u>May Visitation</u>	<u>2019</u> <u>Visitor #</u>	<u>Δ</u>
Florida	59,438	+0.9
Southeast	12,298	+11.6
Northeast	22,546	+9.9
Midwest	18,886	+8.9
Canada	3,074	+17.5
Europe	22,106	+9.2
Other	8,052	+14.7
Total	146,400	+6.3



Naples, Marco Island, Everglades: May 2019 Summary

3. Compared to last May, **27.4%** of Collier lodging managers report their three month forward reservations levels as “up.”

% of Properties (May)		
<u>Reporting Reservations:</u>	<u>2018</u>	<u>2019</u>
Up	62.7%	27.4%
Same	30.0	45.5
Down	7.3	27.1

4. This May, nearly six out of ten of the destination’s visitors flew (2018: 56.7%; 2019: 58.4%). A majority of these (**61.4%**) deplaned at RSW, with Miami capturing some **18.4%** of deplanements.
5. This May, visitor party size averaged **2.5** travelers who stayed for **3.0 nights** in the Naples, Marco Island, Everglades area (2018: 2.4 people; 2.9 nights).
6. Some **48.7%** of Collier’s May visitors are in the destination for the first time.
7. Fully **95.0%** consult the web for trip information, with some **79.2%** making bookings for their trip online.
8. The majority (**96.7%**) are satisfied with their Collier stay, with **89.2%** planning a future trip to the area.
9. The typical May visitor is **47.0 years of age**.

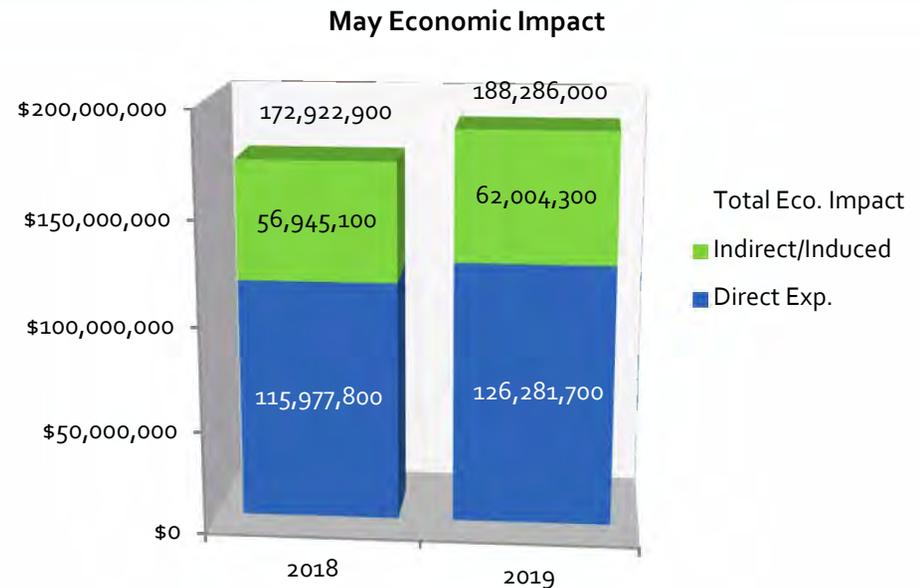
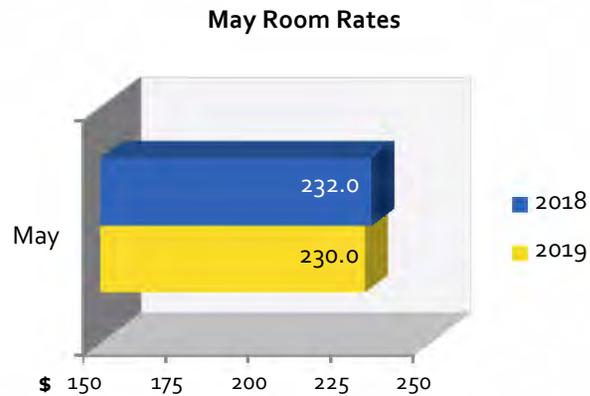
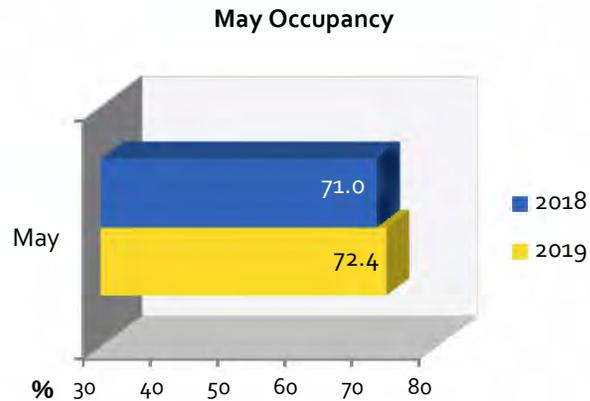
Naples, Marco Island, Everglades: *May 2019 Visitor Profile*



Naples, Marco Island, Everglades Visitor Profile May 2019

H/M/C+ Visitor Statistics	Year to Date (January – May)			May		
	2018	2019	% Δ '18/'19	2018	2019**	% Δ '18/'19
Visitors (#)	895,800	938,900	+4.8	137,700	146,400	+6.3
Room Nights	1,143,300	1,206,600	+5.5	186,200	202,500	+8.8
Direct Exp. (\$)	\$799,827,600	\$857,227,000	+7.2	\$115,977,800	\$126,281,700	+8.9
Total Eco. Impact (\$)	\$1,192,543,000	\$1,278,125,400	+7.2	\$172,922,900	\$188,286,000	+8.9

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



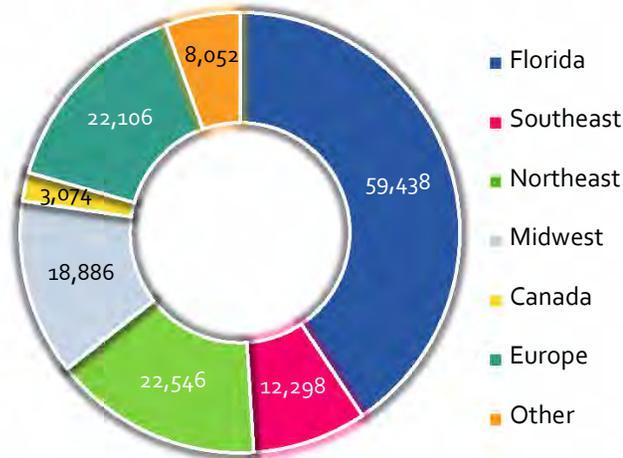
Lodging Statistics	2018	2019**	% Δ '18/'19
Occupancy	71.0%	72.4%	+2.0
Room Rates	\$232.0	\$230.0	-0.9
RevPAR	\$164.7	\$166.5	+1.1

** Note: Available records suggest that approximately 15 Collier lodging units remained closed in May 2019. (May 2018: 650 units).

May 2019 Visitor Origin Markets

Visitor Origins	2018		2019		% Δ '18/'19
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	42.8%	58,936	40.6%	59,438	+0.9
Southeast	8.0	11,016	8.4	12,298	+11.6
Northeast	14.9	20,517	15.4	22,546	+9.9
Midwest	12.6	17,350	12.9	18,886	+8.9
Canada	1.9	2,616	2.1	3,074	+17.5
Europe	14.7	20,242	15.1	22,106	+9.2
Other	5.1	7,023	5.5	8,052	+14.7
Total	100.0	137,700	100.0	146,400	+6.3

May 2019 Visitor Origins



Naples, Marco Island, Everglades Visitor Profile | May 2019

Transportation Mode (Multiple Response)	May 2018	May 2019	
Plane	56.7%	58.4%	↑
Rental Car	50.5	51.0	↑
Personal Car	43.7	41.5	↓

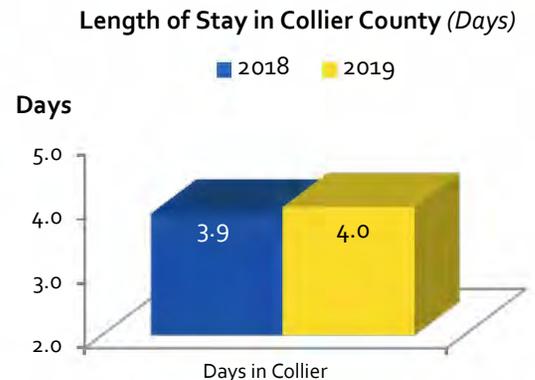
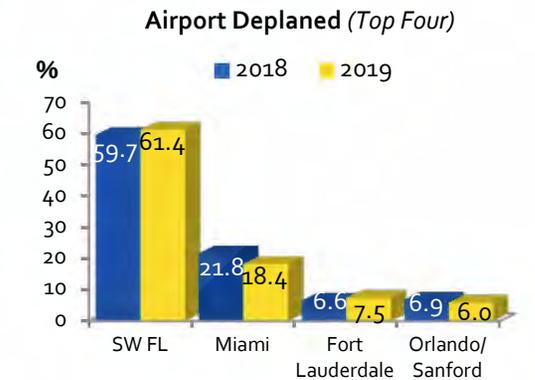
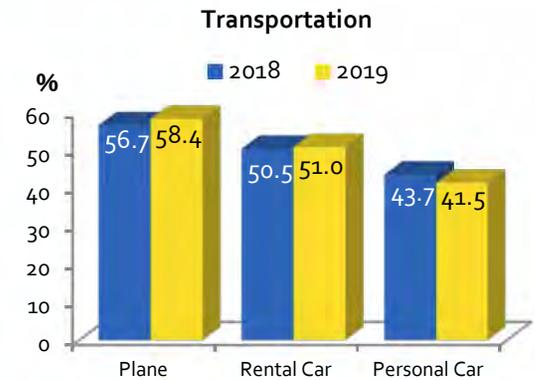
Airport Deplened (Base: Flew)	May 2018	May 2019	
Southwest Florida International	59.7%	61.4%	↑
Miami International	21.8	18.4	↓
Ft. Lauderdale International	6.6	7.5	↑
Orlando International/Sanford	6.9	6.0	↓
Tampa International	3.2	2.7	↓

Purpose of Trip (Multiple Response)	May 2018	May 2019	
Vacation/Weekend Getaway	81.8%	84.3%	↑
Group Travel	30.3	29.1	↓
Visit with Friends and Relatives	8.8	10.2	↑

First Visit to (% yes)	May 2018	May 2019	
Collier County	50.3%	48.7%	↓
Florida	7.3	6.0	↓

Length of Stay (Days)	May 2018	May 2019	
In Collier County	3.9	4.0	↑

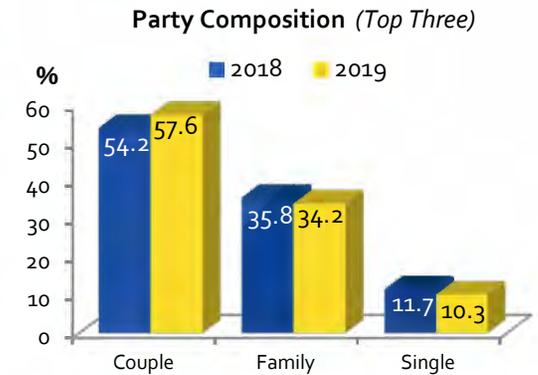
Party Size	May 2018	May 2019	
Number of People	2.4	2.5	↑



Naples, Marco Island, Everglades Visitor Profile | May 2019

Party Composition (Multiple Response)

	May 2018	May 2019	
Couple	54.2%	57.6%	↑
Family	35.8	34.2	↓
Single	11.7	10.3	↓
Group of Friends	3.9	4.2	↑



Did Party Have Lodging Reservations for Stay

	May 2018	May 2019	
% Yes	92.7%	94.9%	↑

Expense Relative to Expectations

	May 2018	May 2019	
More Expensive	15.2%	14.7%	↓
Less Expensive	2.0	3.3	↑
As Expected	77.2	78.6	↑

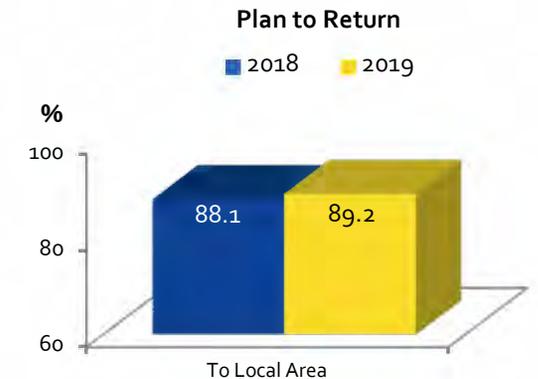


Satisfaction with Collier County

	May 2018	May 2019	
Very Satisfied	87.3%	88.7%	↑
Satisfied	9.1	8.0	↓
Satisfaction Level (Combined)	96.4%	96.7%	↑

Recommend Collier to Friends/Relatives

	May 2018	May 2019	
% Yes	91.6%	92.1%	↑



Plan to Return (% Yes)

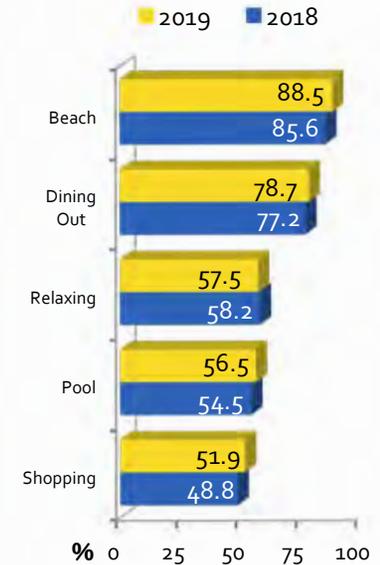
	May 2018	May 2019	
To Local Area	88.1%	89.2%	↑

Naples, Marco Island, Everglades Visitor Profile | May 2019

Activities Enjoyed in Area (Multiple Response)

	May 2018	May 2019	
Beach	85.6%	88.5%	↑
Dining Out	77.2	78.7	↑
Relaxing	58.2	57.5	↓
Pool	54.5	56.5	↑
Shopping	48.8	51.9	↑
Enjoying Nature/Bird Watching/Everglades	35.5	36.2	↑
Sunsets	32.3	35.6	↑
Swimming	32.5	30.9	↓
Reading	27.9	30.1	↑
Sunning	27.5	29.0	↑
Walking	25.0	26.8	↑
Sightseeing	21.5	23.6	↑
Bars/Nightlife	20.6	21.3	↑
Visiting with Friends/Relatives	13.0	14.4	↑
Art Galleries/Shows/Fairs	15.3	13.5	↓
Golfing	8.1	7.2	↓

Activities Enjoyed in Area (Top Five)



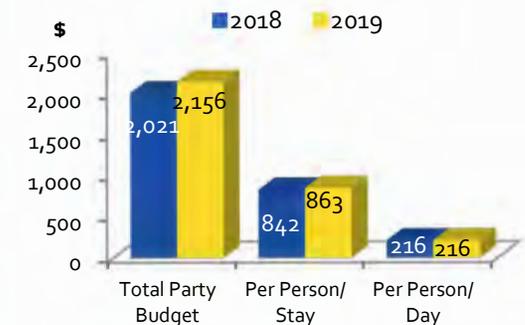
Demographics

	May 2018	May 2019	
Average Age Head of Household (Years)	46.3	47.0	↑
Median Annual Household Income	\$141,645	\$145,279	↑

Collier Base Budget

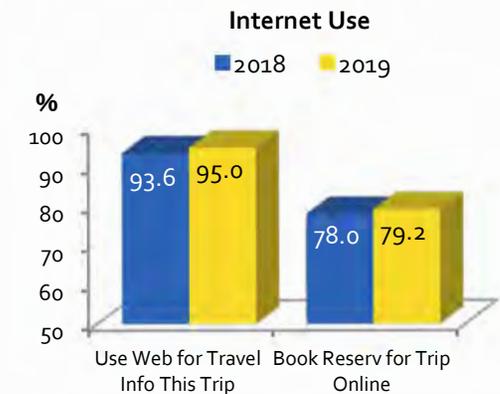
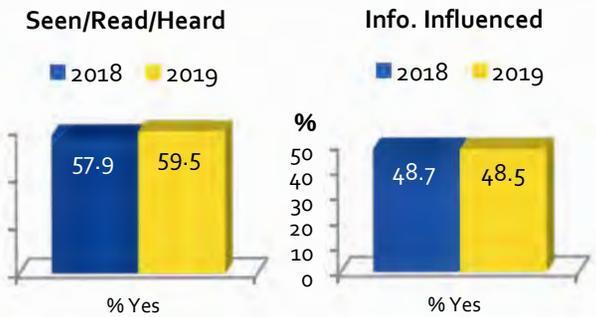
	May 2018	May 2019	
Total	\$2,021.39	\$2,156.45	↑
Per Person/Stay	842.25	862.58	↑
Per Person/Day	215.96	215.65	↓

Collier Base Budgets



Naples, Marco Island, Everglades Visitor Profile | May 2019

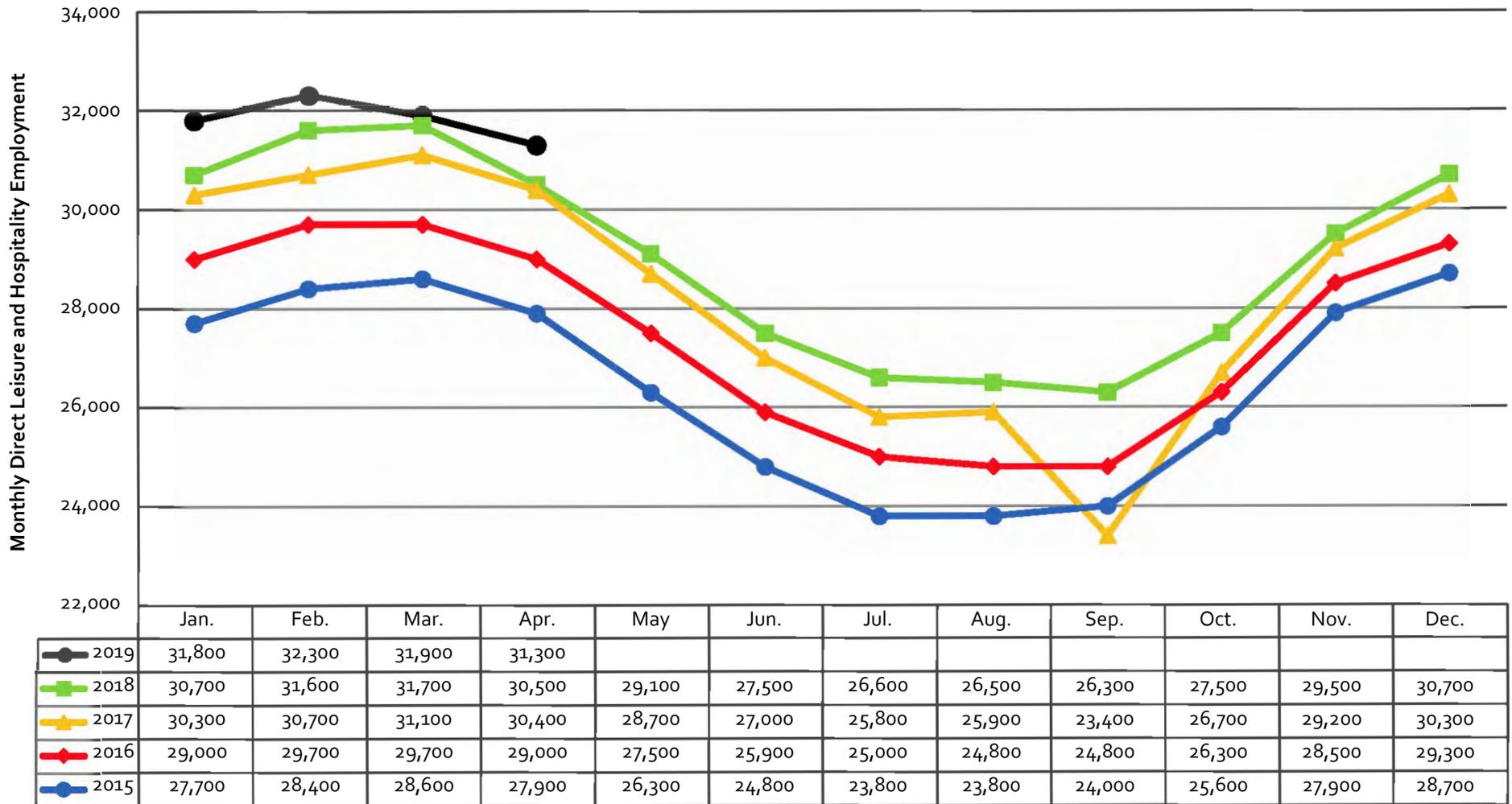
Area Information Seen/Read/Heard	May 2018	May 2019	
% Yes	57.9%	59.5%	↑
Directly Influenced by Information (Base: Seen/Read/Heard Area Information)			
	May 2018	May 2019	
% Yes	48.7%	48.5%	↓
Why Chose the Area (Multiple Response)			
	May 2018	May 2019	
Beach Area	52.0%	54.7%	↑
Weather	45.3	48.4	↑
Previous Experience	32.0	35.0	↑
Relaxing	33.3	32.8	↓
Quiet/Peaceful/Laid Back	31.8	32.2	↑
Restaurants	29.5	31.0	↑
Quality of Accommodations	28.5	30.3	↑
Not Crowded	27.0	28.6	↑
Outdoor Recreation/Nature	27.5	28.2	↑
Business/Meeting/Conference	28.0	25.8	↓
Recommendation	27.7	24.9	↓
Appealing Brochures/Websites	21.0	23.6	↑
Never Been	23.7	20.4	↓
Internet Use			
	May 2018	May 2019	
Use Internet to Obtain Travel Info for This Trip (% Yes)	93.6%	95.0%	↑
Book Reservations for Trip Online (%Yes)	78.0	79.2	↑



Industry Data:
2015 - 2019

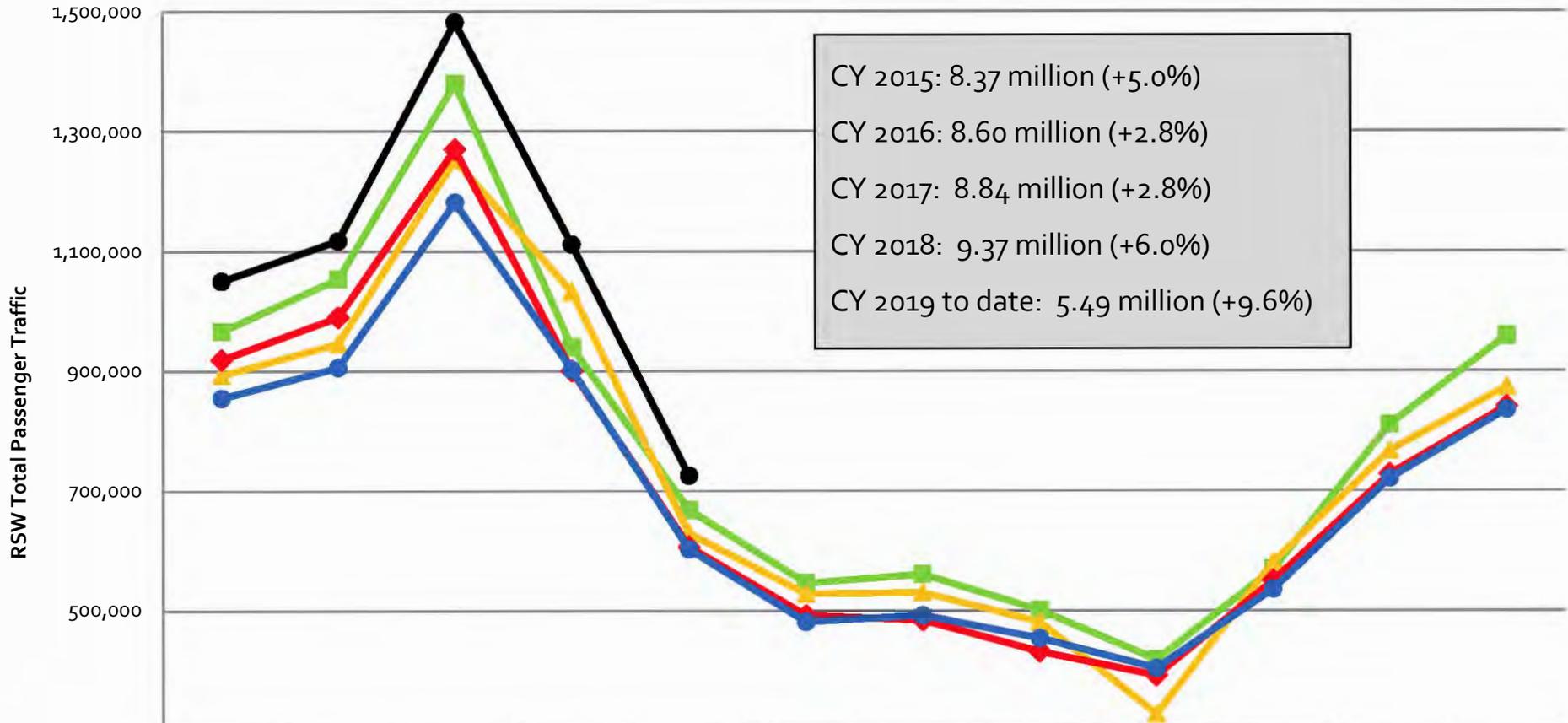


Collier Direct Leisure and Hospitality Employment (Calendar Year) *



* 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: 5.49 million (+9.6%)

	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							
■ 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