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Naples, Marco Island, Everglades Convention and Visitors Bureau November 2018 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

December 2018

Naples, Marco Island, Everglades: November 2018 Summary

Executive Summary: November 2018

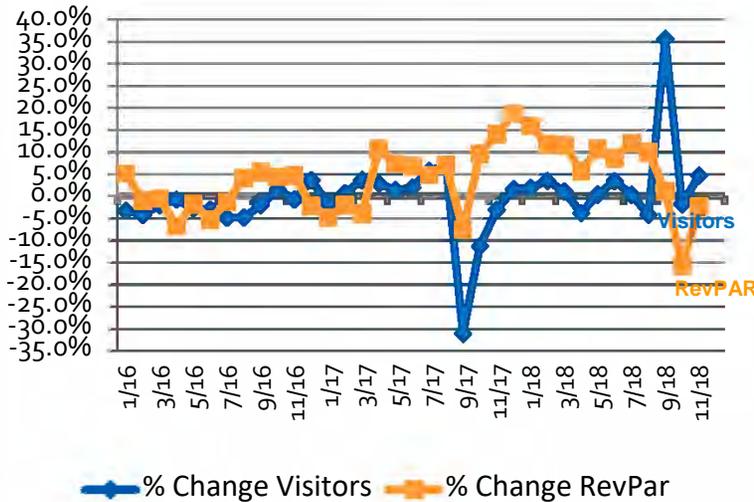
- This November, some **145,900** visitors stayed in Collier's commercial lodgings (**+4.7%**)*. Their visits contributed an estimated **\$152,038,800** of economic impact to the County (**+6.6%**). Key performance metrics are as follows:

| <u>November</u> | <u>2017</u> | <u>2018**</u> | <u>% Δ</u> |
|-----------------|-------------|---------------|------------|
| Occupancy | 80.7% | 77.2% | -4.3% |
| ADR | \$184.5 | \$188.4 | +2.1% |
| RevPAR | \$148.9 | \$145.4 | -2.4% |

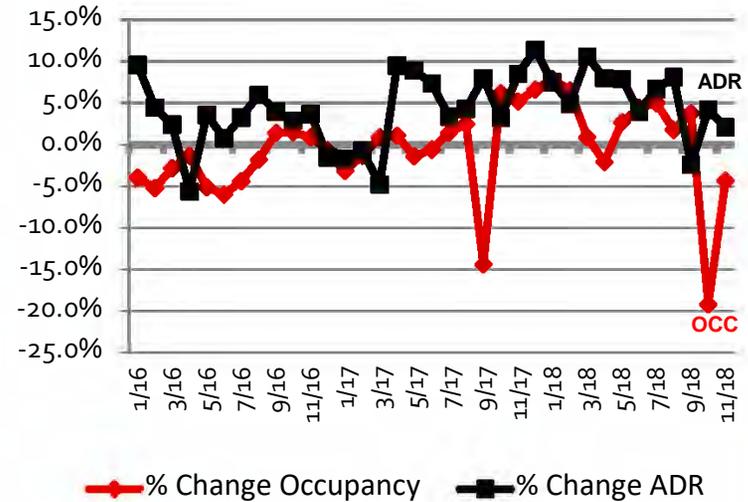
* As of November 2018, approximately 109 Collier lodging units remained closed for renovations. Hurricane Irma made landfall on September 10, 2017.

** Based on units available to be rented.

Key Collier Visitation Metrics (%Δ)



Key Collier Visitation Metrics (%Δ)



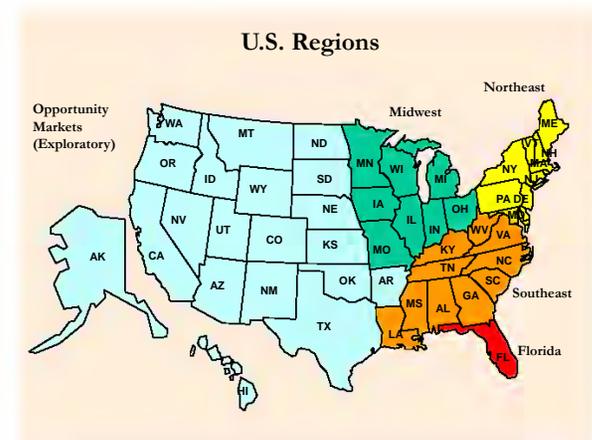
Naples, Marco Island, Everglades: November 2018 Summary

2. Compared to last November, **48.3%** of Collier lodging managers report their three month forward reservations levels as “up” (**2017: 50.0%**).

| % of Properties (November) | | |
|--------------------------------|-------------|-------------|
| <u>Reporting Reservations:</u> | | |
| | <u>2017</u> | <u>2018</u> |
| Up | 50.0% | 48.3% |
| Same | 30.8 | 31.0 |
| Down | 19.2 | 20.7 |

3. Collier’s November visitation originates from the following primary market segments:

| <u>November Visitation</u> | <u>2018</u> <u>Visitor #</u> | <u>Δ</u> |
|----------------------------|---------------------------------|-------------|
| Florida | 55,734 | +3.0 |
| Southeast | 9,338 | +3.1 |
| Northeast | 20,572 | +11.8 |
| Midwest | 22,323 | +10.4 |
| Canada | 2,772 | -0.6 |
| Europe | 28,596 | -0.9 |
| Other | 6,565 | +9.5 |
| Total | 145,900 | +4.7 |



4. This November, better than half of the destination’s visitor parties flew (**60.3%**). A majority of these (**57.0%**) deplaned at RSW, with Miami capturing some **24.4%** of deplanements.
5. This November, visitor party size averaged **2.4** travelers who stayed for **3.2 nights** in the Naples, Marco Island, Everglades area (**2017: 2.5 people; 3.3 nights**).

Naples, Marco Island, Everglades: November 2018 Summary

- 6.** Some **40.3%** of Collier's November visitors are in the destination for the first time.
- 7.** Fully **93.6%** consult the web for trip information, with some **85.0%** making bookings for their trip online.
- 8.** The majority (**97.1%**) are satisfied with their Collier stay, with **93.5%** planning a future trip to the area.
- 9.** The typical November visitor is **48.2 years of age**.

Naples, Marco Island, Everglades: *November 2018 Visitor Profile*

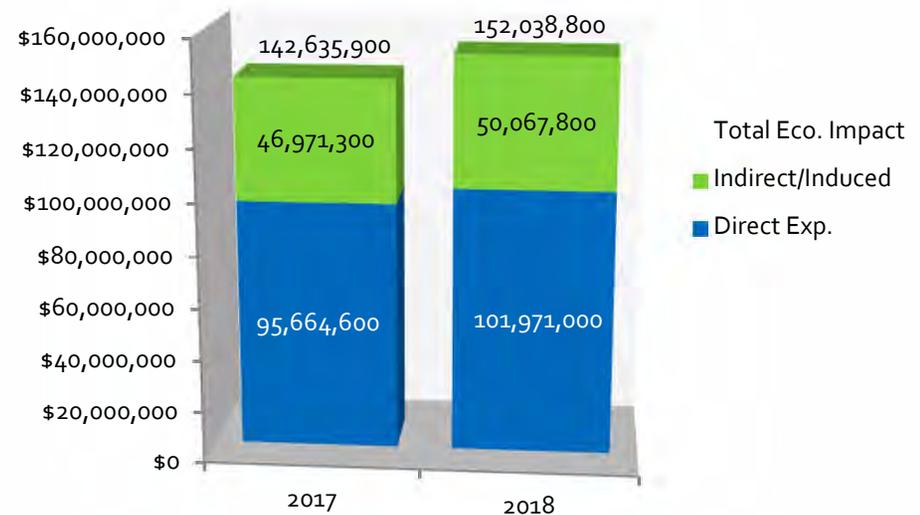
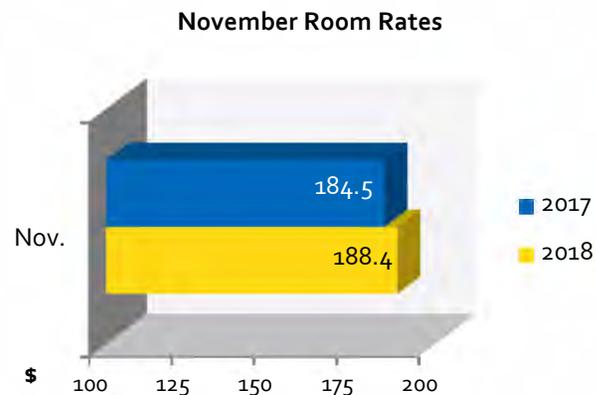
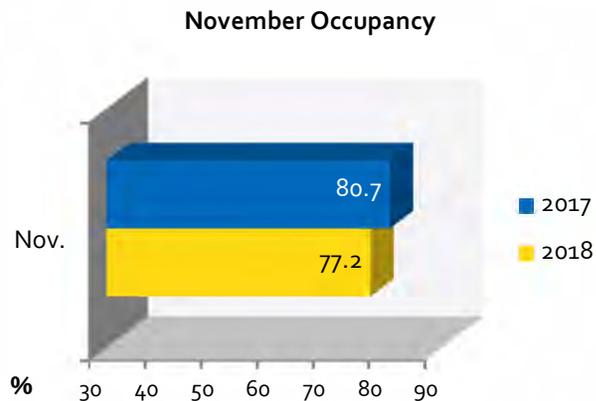


Naples, Marco Island, Everglades Visitor Profile | November 2018

| H/M/C+ Visitor Statistics | Year to Date (January – November) | | | November | | |
|-------------------------------|-----------------------------------|------------------------|-------------|----------------------|----------------------|-------------|
| | 2017 | 2018 | % Δ '17/'18 | 2017 | 2018* | % Δ '17/'18 |
| Visitors (#) | 1,617,000 | 1,652,600 | +2.2 | 139,400 | 145,900 | +4.7 |
| Room Nights | 2,165,000 | 2,176,900 | +0.5 | 174,300 | 183,600 | +5.3 |
| Direct Exp. (\$) | \$1,240,185,700 | \$1,288,716,900 | +3.9 | \$95,664,600 | \$101,971,000 | +6.6 |
| Total Eco. Impact (\$) | \$1,849,116,900 | \$1,921,477,000 | +3.9 | \$142,635,900 | \$152,038,800 | +6.6 |

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

November Economic Impact



November Lodging Statistics

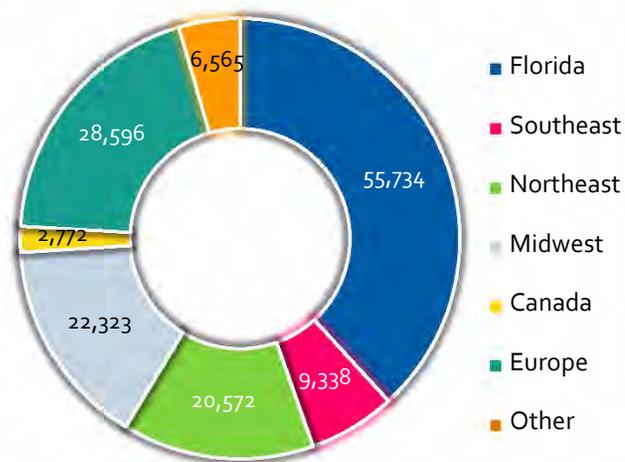
| Lodging Statistics | 2017 | 2018** | % Δ '17/'18 |
|--------------------|---------|---------|-------------|
| Occupancy | 80.7% | 77.2% | -4.3 |
| Room Rates | \$184.5 | \$188.4 | +2.1 |
| RevPAR | \$148.9 | \$145.4 | -2.4 |

** Note: This November, 109 Collier lodging units remained closed for renovations. Hurricane Irma made landfall on September 10, 2017.

November 2018 Visitor Origin Markets

| Visitor Origins | 2017 | | 2018 | | % Δ '17/'18 |
|-----------------|------------------|--------------------|------------------|--------------------|-------------|
| | Share of Mkt (%) | Number of Visitors | Share of Mkt (%) | Number of Visitors | |
| Florida | 38.8% | 54,087 | 38.2% | 55,734 | +3.0 |
| Southeast | 6.5 | 9,061 | 6.4 | 9,338 | +3.1 |
| Northeast | 13.2 | 18,401 | 14.1 | 20,572 | +11.8 |
| Midwest | 14.5 | 20,213 | 15.3 | 22,323 | +10.4 |
| Canada | 2.0 | 2,788 | 1.9 | 2,772 | -0.6 |
| Europe | 20.7 | 28,856 | 19.6 | 28,596 | -0.9 |
| Other | 4.3 | 5,994 | 4.5 | 6,565 | +9.5 |
| Total | 100.0 | 139,400 | 100.0 | 145,900 | +4.7 |

November 2018 Visitor Origins



Naples, Marco Island, Everglades Visitor Profile | November 2018

Transportation Mode (Multiple Response)

| | November 2017 | November 2018 | |
|--------------|---------------|---------------|---|
| Plane | 60.9% | 60.3% | ↓ |
| Rental Car | 56.5 | 55.8 | ↓ |
| Personal Car | 38.8 | 39.3 | ↑ |

Airport Deplened (Base: Flew)

| | November 2017 | November 2018 | |
|---------------------------------|---------------|---------------|---|
| Southwest Florida International | 55.1% | 57.0% | ↑ |
| Miami International | 26.3 | 24.4 | ↓ |
| Orlando International/Sanford | 7.8 | 8.5 | ↑ |
| Tampa International | 5.5 | 5.8 | ↑ |
| Ft. Lauderdale International | 5.1 | 3.8 | ↓ |

Purpose of Trip (Multiple Response)

| | November 2017 | November 2018 | |
|----------------------------------|---------------|---------------|---|
| Vacation/Weekend Getaway | 65.7% | 67.2% | ↑ |
| Group Travel | 33.4 | 32.3 | ↓ |
| Visit with Friends and Relatives | 12.9 | 13.2 | ↑ |
| Special Event | 10.9 | 7.8 | ↓ |

First Visit to (% yes)

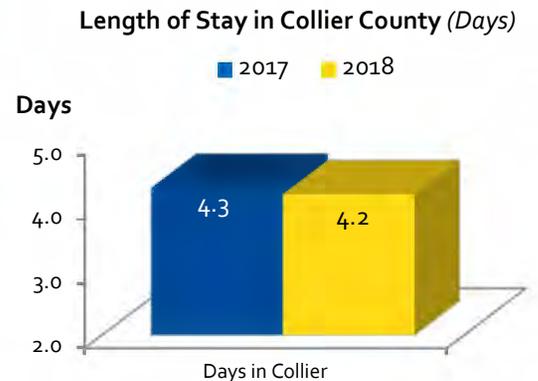
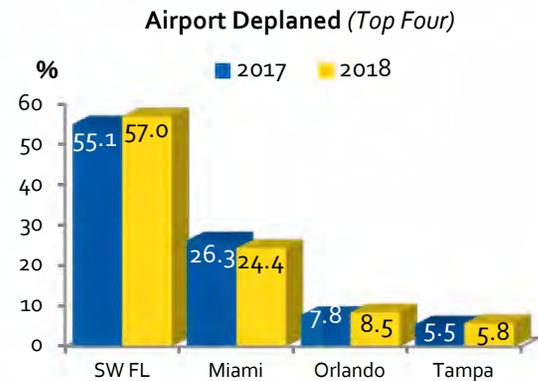
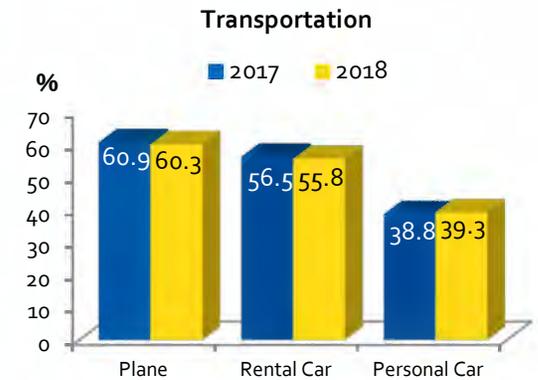
| | November 2017 | November 2018 | |
|----------------|---------------|---------------|---|
| Collier County | 41.7% | 40.3% | ↓ |
| Florida | 4.5 | 4.0 | ↓ |

Length of Stay (Days)

| | November 2017 | November 2018 | |
|-------------------|---------------|---------------|---|
| In Collier County | 4.3 | 4.2 | ↓ |

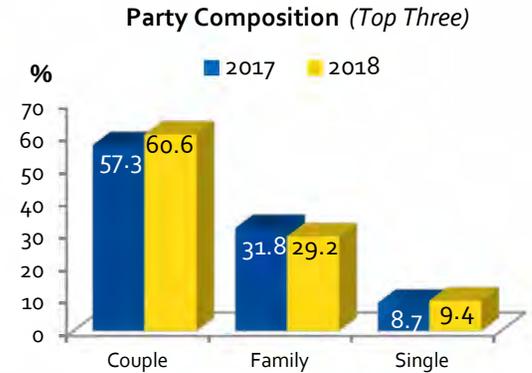
Party Size

| | November 2017 | November 2018 | |
|------------------|---------------|---------------|---|
| Number of People | 2.5 | 2.4 | ↓ |



Naples, Marco Island, Everglades Visitor Profile | November 2018

| Party Composition (Multiple Response) | November 2017 | November 2018 | |
|---------------------------------------|---------------|---------------|---|
| Couple | 57.3% | 60.6% | ↑ |
| Family | 31.8 | 29.2 | ↓ |
| Single | 8.7 | 9.4 | ↑ |
| Business Associates | 4.9 | 4.4 | ↓ |
| Group of Couples | 3.6 | 3.2 | ↓ |
| Group of Friends | 3.5 | 3.0 | ↓ |



| Did Party Have Lodging Reservations for Stay | November 2017 | November 2018 | |
|--|---------------|---------------|---|
| % Yes | 94.0% | 95.7% | ↑ |



| Expense Relative to Expectations | November 2017 | November 2018 | |
|----------------------------------|---------------|---------------|---|
| More Expensive | 22.3% | 24.2% | ↑ |
| Less Expensive | 7.4 | 7.1 | ↓ |
| As Expected | 57.9 | 55.5 | ↓ |



| Satisfaction with Collier County | November 2017 | November 2018 | |
|--------------------------------------|---------------|---------------|----------|
| Very Satisfied | 89.9% | 91.3% | ↑ |
| Satisfied | 6.5 | 5.8 | ↓ |
| Satisfaction Level (Combined) | 96.4% | 97.1% | ↑ |

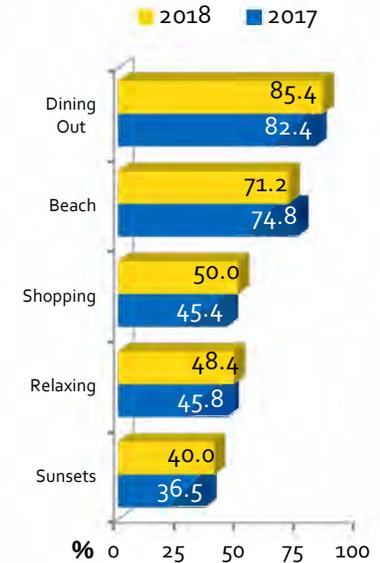
| Recommend Collier to Friends/Relatives | November 2017 | November 2018 | |
|--|---------------|---------------|---|
| % Yes | 94.2% | 94.7% | ↑ |

| Plan to Return (% Yes) | November 2017 | November 2018 | |
|------------------------|---------------|---------------|---|
| To Local Area | 94.0% | 93.5% | ↓ |

Naples, Marco Island, Everglades Visitor Profile | November 2018

| Activities Enjoyed in Area (Multiple Response) | November 2017 | November 2018 | |
|--|---------------|---------------|---|
| Dining Out | 82.4% | 85.4% | ↑ |
| Beach | 74.8 | 71.2 | ↓ |
| Shopping | 45.4 | 50.0 | ↑ |
| Relaxing | 45.8 | 48.4 | ↑ |
| Sunsets | 36.5 | 40.0 | ↑ |
| Sunning | 34.1 | 31.7 | ↓ |
| Pool | 23.8 | 25.8 | ↑ |
| Enjoying Nature/Bird Watching/Everglades | 27.2 | 24.9 | ↓ |
| Sightseeing | 25.4 | 23.7 | ↓ |
| Swimming | 20.9 | 19.6 | ↓ |
| Reading | 18.1 | 18.8 | ↑ |
| Bars/Nightlife | 15.8 | 18.3 | ↑ |
| Art Galleries/Shows/Fairs | 17.2 | 16.9 | ↓ |
| Walking | 16.8 | 16.0 | ↓ |
| Visiting with Friends/Relatives | 14.7 | 15.7 | ↑ |
| Shelling | 17.2 | 13.8 | ↓ |
| Boating | 13.4 | 11.2 | ↓ |
| Golfing | 10.2 | 9.2 | ↓ |

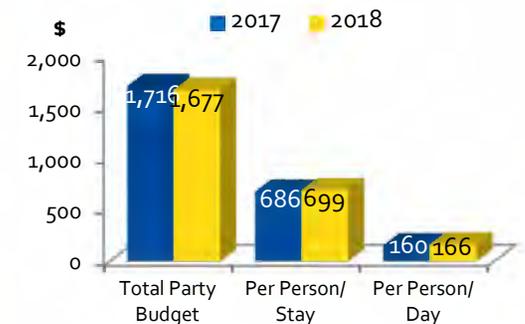
Activities Enjoyed in Area (Top Five)



| Demographics | November 2017 | November 2018 | |
|---------------------------------------|---------------|---------------|---|
| Average Age Head of Household (Years) | 47.6 | 48.2 | ↑ |
| Median Annual Household Income | \$167,934 | \$171,623 | ↑ |

| Collier Base Budget | November 2017 | November 2018 | |
|---------------------|---------------|---------------|---|
| Total | \$1,715.64 | \$1,677.38 | ↓ |
| Per Person/Stay | 686.26 | 698.91 | ↑ |
| Per Person/Day | 159.59 | 166.41 | ↑ |

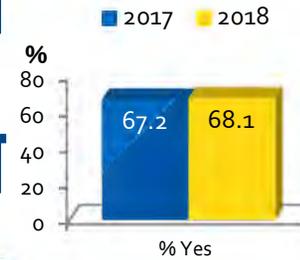
Collier Base Budgets



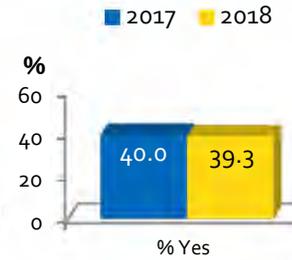
Naples, Marco Island, Everglades Visitor Profile | November 2018

| Area Information Seen/Read/Heard | November 2017 | November 2018 | |
|---|---------------|---------------|---|
| % Yes | 67.2% | 68.1% | ↑ |
| Directly Influenced by Information (Base: Seen/Read/Heard Area Information) | | | |
| | November 2017 | November 2018 | |
| % Yes | 40.0% | 39.3% | ↓ |
| Why Chose the Area (Multiple Response) | | | |
| | November 2017 | November 2018 | |
| Beach Area | 59.7% | 58.0% | ↓ |
| Quiet/Peaceful/Laid Back | 51.2 | 55.1 | ↑ |
| Weather | 45.3 | 47.3 | ↑ |
| Relaxing | 41.8 | 43.4 | ↑ |
| Previous Experience | 36.5 | 38.6 | ↑ |
| Not Crowded | 37.5 | 38.0 | ↑ |
| Quality of Accommodations | 34.9 | 37.7 | ↑ |
| Business/Meeting/Conference | 36.8 | 35.6 | ↓ |
| Appealing Brochures/Websites | 33.8 | 34.7 | ↑ |
| Restaurants | 30.3 | 31.4 | ↑ |
| Outdoor Recreation/Nature | 31.4 | 25.3 | ↓ |
| Shopping | 25.5 | 24.8 | ↓ |
| Recommendation | 22.1 | 20.1 | ↓ |
| Never Been | 20.9 | 17.3 | ↓ |
| Internet Use | | | |
| | November 2017 | November 2018 | |
| Use Internet to Obtain Travel Info for This Trip (% Yes) | 93.9% | 93.6% | ↓ |
| Book Reservations for Trip Online (%Yes) | 84.0 | 85.0 | ↑ |

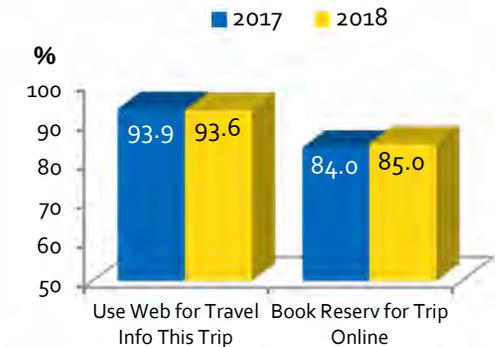
Seen/Read/Heard



Info. Influenced



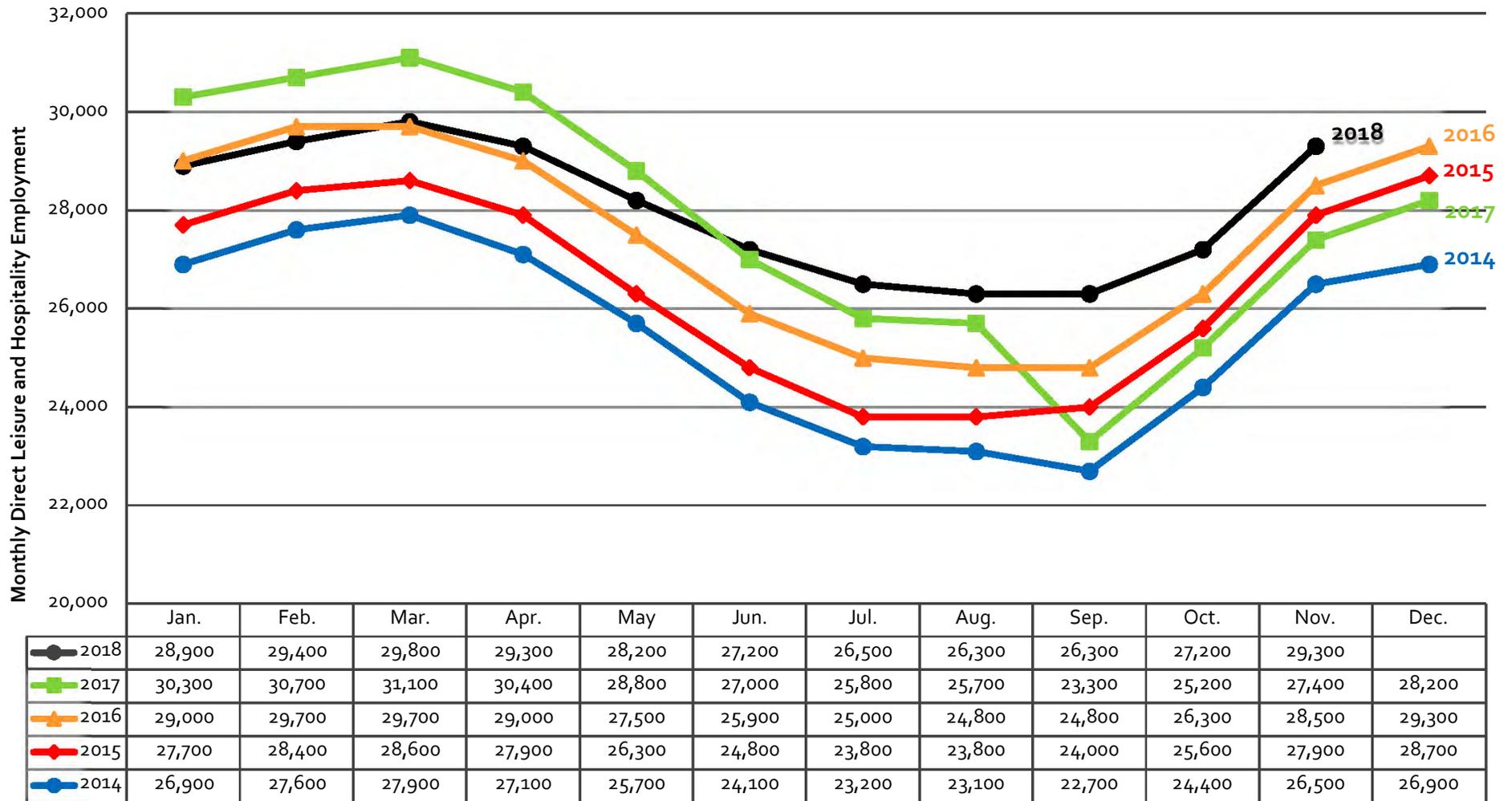
Internet Use



Industry Data: *2014-2018*

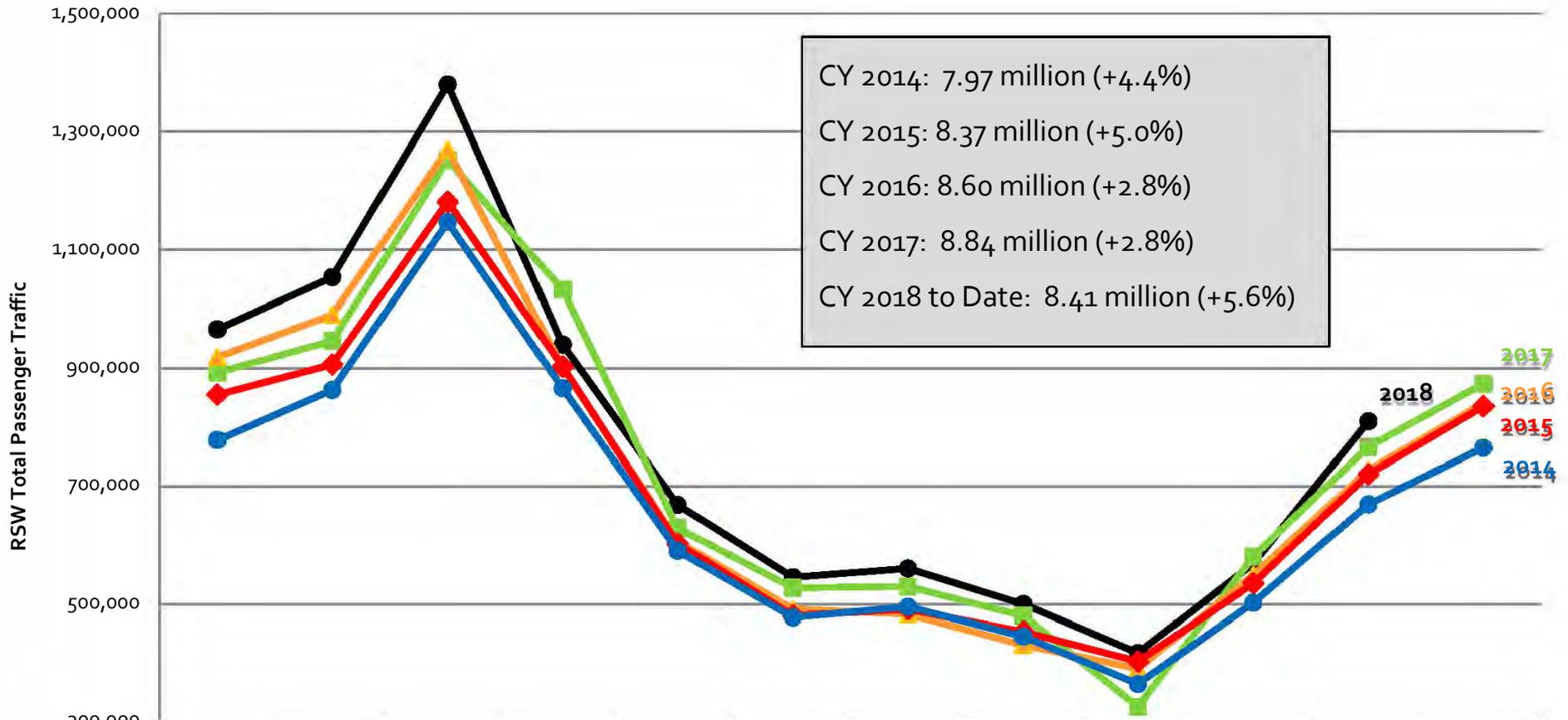


Collier Direct Leisure and Hospitality Employment (Calendar Year) *



* Source: Florida Department of Economic Opportunity/U.S. Department of Labor.

Southwest Florida International Airport (RSW) Passenger Traffic



| | Jan. | Feb. | Mar. | Apr. | May | Jun. | Jul. | Aug. | Sep. | Oct. | Nov. | Dec. |
|------|---------|-----------|-----------|-----------|---------|---------|---------|---------|---------|---------|---------|---------|
| 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 | |
| 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 |
| 2014 | 778,163 | 862,899 | 1,147,059 | 865,554 | 591,116 | 478,692 | 496,472 | 446,402 | 366,038 | 503,243 | 669,567 | 765,288 |