

RESEARCH DATA SERVICES, INC.

4520 WEST OAKELLAR AVENUE • #13169
TAMPA, FLORIDA 33611
TEL (813) 254-2975 • FAX (813) 223-2986



Naples, Marco Island, Everglades Convention and Visitors Bureau September 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

October 2019

Naples, Marco Island, Everglades: September 2019 Summary

Executive Summary: September 2019

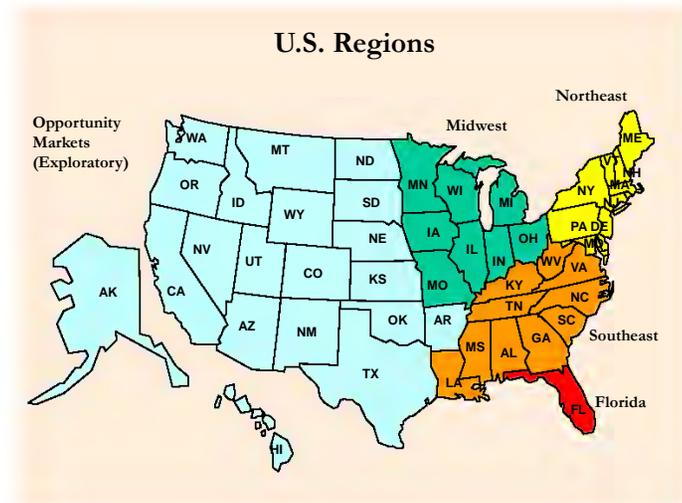
- This September, some **92,300** visitors stayed in Collier's commercial lodgings (**+7.2%***). Their visits contributed an estimated **\$83,660,200** of economic impact to the County (**+12.9%**). Key performance metrics are as follows:

<u>September</u>	<u>2018</u>	<u>2019</u>	<u>% Δ</u>
Occupancy	57.8%	58.3%	+0.9%
ADR	\$132.9	\$140.6	+5.8%
RevPAR	\$76.8	\$82.0	+6.8%

* Available records suggest that approximately 28 Collier lodging units remained closed in September 2019. (September 2018: 471 units)

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

<u>September Visitation</u>	<u>2019</u> <u>Visitor #</u>	<u>Δ</u>
Florida	40,150	+4.3
Southeast	6,092	+4.0
Northeast	11,722	+5.5
Midwest	8,307	+17.7
Canada	923	-23.4
Europe	19,383	+12.0
Other	5,723	+12.7
Total	92,300	+7.2



Naples, Marco Island, Everglades: September 2019 Summary

3. Compared to last September, **44.0%** of Collier lodging managers report their three month forward reservations levels as “up.”

% of Properties (September)		
<u>Reporting Reservations:</u>	<u>2018</u>	<u>2019</u>
Up	39.3%	44.0%
Same	20.3	40.0
Down	40.4	16.0

4. This September, almost half of the destination’s visitor parties flew (*2018: 53.7%; 2019: 55.2%*). A majority of these (**58.8%**) deplaned at RSW, with Miami capturing some **23.4%** of deplanements.
5. This September, visitor party size averaged **2.4** travelers who stayed for **3.5 nights** in the Naples, Marco Island, Everglades area (*2018: 2.3 people; 3.4 nights*).
6. Some **44.9%** of Collier’s September visitors are in the destination for the first time.
7. Fully **94.8%** consult the web for trip information, with some **83.5%** making bookings for their trip online.
8. The majority (**92.5%**) are satisfied with their Collier stay, with **88.7%** planning a future trip to the area.
9. The typical September visitor is **47.0 years of age**.

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

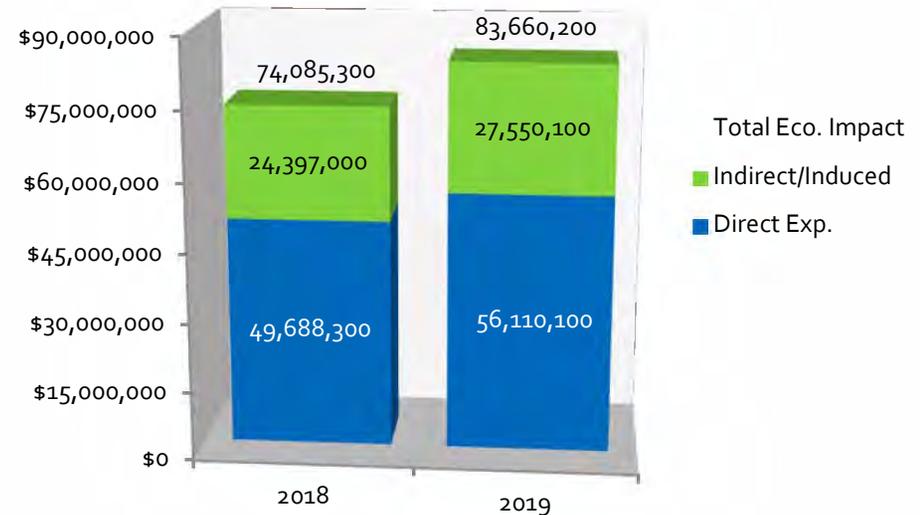
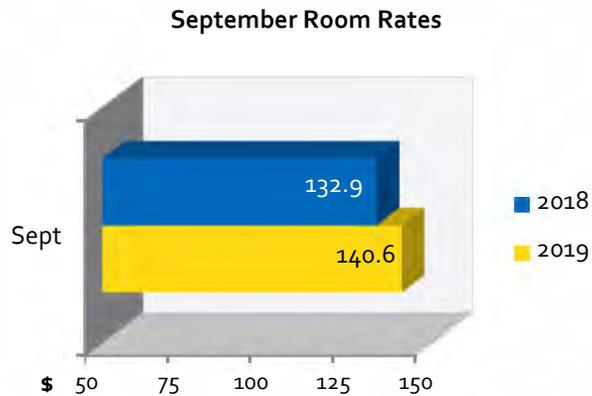
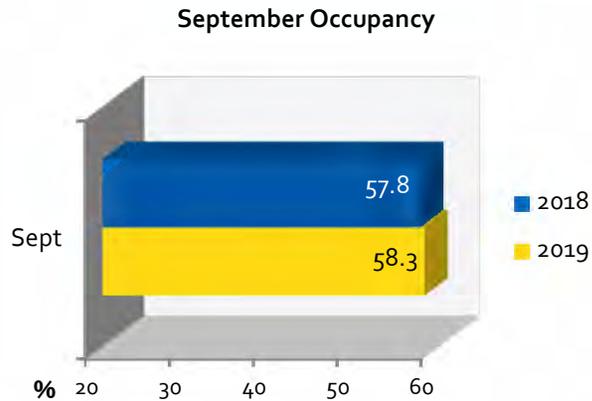


Naples, Marco Island, Everglades Visitor Profile | September 2019

H/M/C+ Visitor Statistics	Year to Date (January – September)			September		
	2018	2019	% Δ '18/'19	2018	2019**	% Δ '18/'19
Visitors (#)	1,370,100	1,439,100	+5.0	86,100	92,300	+7.2
Room Nights	1,821,200	1,924,500	+5.7	161,100	173,200	+7.5
Direct Exp. (\$)	\$1,104,270,900	\$1,186,978,300	+7.5	\$49,688,300	\$56,110,100	+12.9
Total Eco. Impact (\$)	\$1,646,468,000	\$1,769,784,600	+7.5	\$74,085,300	\$83,660,200	+12.9

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

September Economic Impact



September

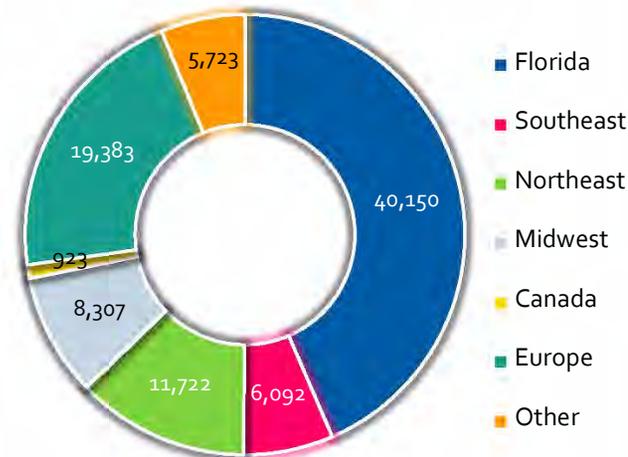
Lodging Statistics	2018	2019**	% Δ '18/'19
Occupancy	57.8%	58.3%	+0.9
Room Rates	\$132.9	\$140.6	+5.8
RevPAR	\$76.8	\$82.0	+6.8

** Note: Available records suggest that approximately 28 Collier lodging units remained closed in September 2019. (September 2018: 471 units).

September 2019 Visitor Origin Markets

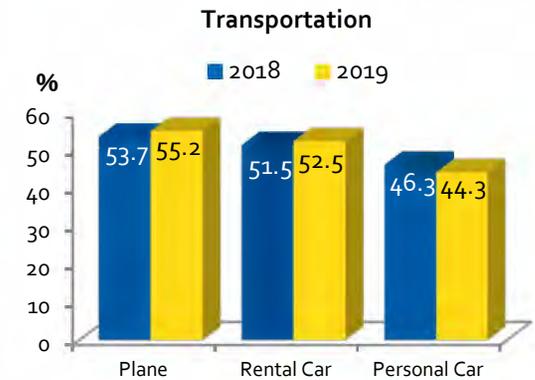
Visitor Origins	2018		2019		% Δ '18/'19
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	44.7%	38,487	43.5%	40,150	+4.3
Southeast	6.8	5,855	6.6	6,092	+4.0
Northeast	12.9	11,107	12.7	11,722	+5.5
Midwest	8.2	7,060	9.0	8,307	+17.7
Canada	1.4	1,205	1.0	923	-23.4
Europe	20.1	17,306	21.0	19,383	+12.0
Other	5.9	5,080	6.2	5,723	+12.7
Total	100.0	86,100	100.0	92,300	+7.2

September 2019 Visitor Origins

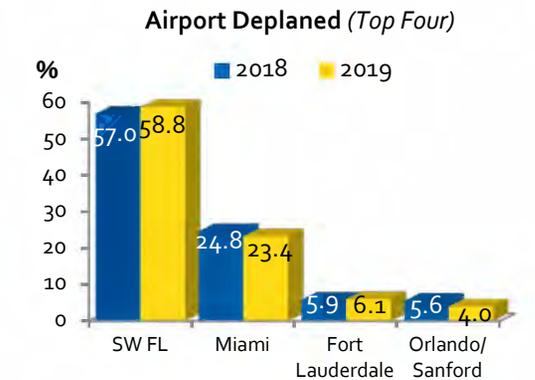


Naples, Marco Island, Everglades Visitor Profile | September 2019

Transportation Mode (Multiple Response)	September 2018	September 2019	
Plane	53.7%	55.2%	↑
Rental Car	51.5	52.5	↑
Personal Car	46.3	44.3	↓

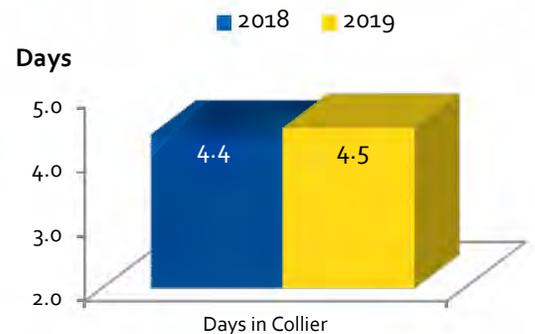


Airport Deplened (Base: Flew)	September 2018	September 2019	
Southwest Florida International	57.0%	58.8%	↑
Miami International	24.8	23.4	↓
Ft. Lauderdale International	5.9	6.1	↑
Orlando International/Sanford	5.6	4.0	↓
Tampa International	2.4	3.6	↑



Purpose of Trip (Multiple Response)	September 2018	September 2019	
Vacation/Weekend Getaway	73.8%	72.9%	↓
Group Travel	23.8	24.3	↑
Visit with Friends and Relatives	11.2	9.6	↓
Special Event	7.7	7.2	↓

Length of Stay in Collier County (Days)



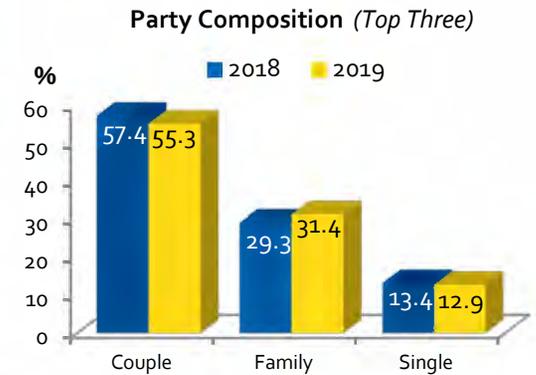
First Visit to (% yes)	September 2018	September 2019	
Collier County	43.5%	44.9%	↑
Florida	9.3	9.6	↑

Length of Stay (Days)	September 2018	September 2019	
In Collier County	4.4	4.5	↑

Party Size	September 2018	September 2019	
Number of People	2.3	2.4	↑

Naples, Marco Island, Everglades Visitor Profile | September 2019

Party Composition (Multiple Response)	September 2018	September 2019	
Couple	57.4%	55.3%	↓
Family	29.3	31.4	↑
Single	13.4	12.9	↓
Group of Friends	8.2	8.9	↑



Did Party Have Lodging Reservations for Stay	September 2018	September 2019	
% Yes	93.4%	94.0%	↑



Expense Relative to Expectations	September 2018	September 2019	
More Expensive	17.9%	23.4%	↑
Less Expensive	5.7	4.8	↓
As Expected	64.1	63.9	↓

Satisfaction with Collier County	September 2018	September 2019	
Very Satisfied	81.8%	83.5%	↑
Satisfied	8.2	9.0	↑
Satisfaction Level (Combined)	90.0%	92.5%	↑



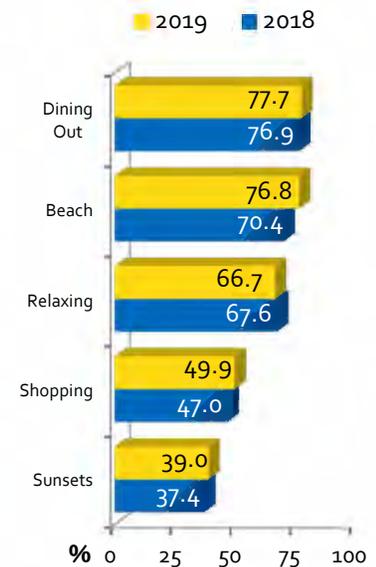
Recommend Collier to Friends/Relatives	September 2018	September 2019	
% Yes	91.1%	92.3%	↑

Plan to Return (% Yes)	September 2018	September 2019	
To Local Area	86.0%	88.7%	↑

Naples, Marco Island, Everglades Visitor Profile | September 2019

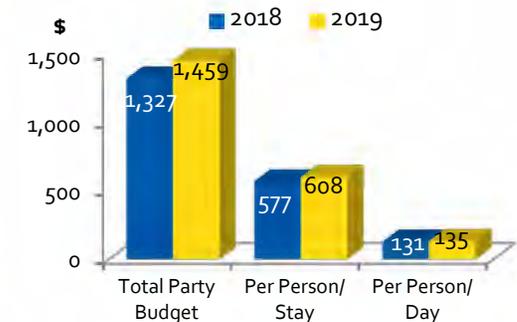
Activities Enjoyed in Area (Multiple Response)	September 2018	September 2019	
Dining Out	76.9%	77.7%	↑
Beach	70.4	76.8	↑
Relaxing	67.6	66.7	↓
Shopping	47.0	49.9	↑
Sunsets	37.4	39.0	↑
Pool	36.2	34.4	↓
Sightseeing	30.9	33.7	↑
Enjoying Nature/Bird Watching/Everglades	26.8	29.3	↑
Swimming	20.1	25.4	↑
Reading	19.4	23.0	↑
Walking	21.0	22.7	↑
Shelling	18.9	20.6	↑
Sunning	15.4	15.7	↑
Bars/Nightlife	14.0	15.4	↑
Boating	9.3	12.7	↑
Visiting with Friends/Relatives	11.5	10.2	↓
Golfing	7.6	9.9	↑
Fishing	5.9	7.7	↑
Art Galleries/Shows/Fairs	9.0	7.5	↓

Activities Enjoyed in Area (Top Five)



Demographics	September 2018	September 2019	
Average Age Head of Household (Years)	46.4	47.0	↑
Median Annual Household Income	\$149,253	\$152,708	↑

Collier Base Budgets



Collier Base Budget	September 2018	September 2019	
Total	\$1,327.33	\$1,458.97	↑
Per Person/Stay	577.10	607.91	↑
Per Person/Day	131.16	135.09	↑

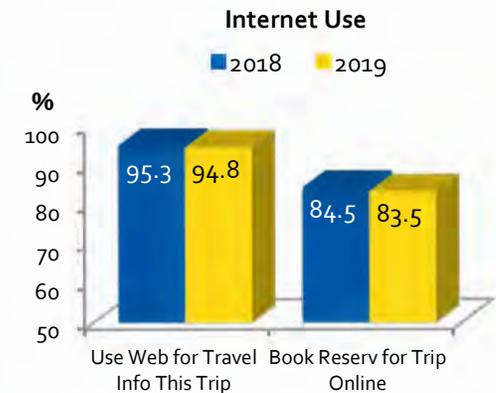
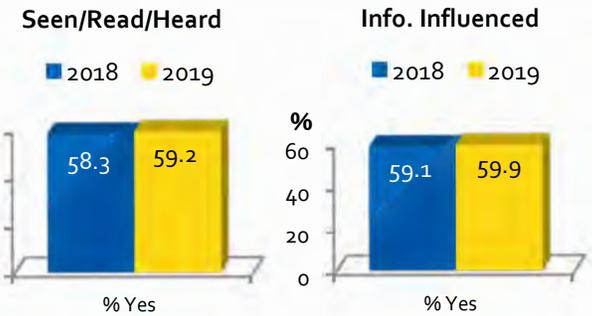
Naples, Marco Island, Everglades Visitor Profile | September 2019

Area Information Seen/Read/Heard	September 2018	September 2019	
% Yes	58.3%	59.2%	↑

Directly Influenced by Information (Base: Seen/Read/Heard Area Information)	September 2018	September 2019	
% Yes	59.1%	59.9%	↑

Why Chose the Area (Multiple Response)	September 2018	September 2019	
Beach Area	53.1%	56.8%	↑
Relaxing	46.9	44.3	↓
Quality of Accommodations	39.5	42.3	↑
Quiet/Peaceful/Laid Back	40.0	40.6	↑
Weather	38.5	40.3	↑
Previous Experience	37.7	36.8	↓
Not Crowded	28.8	27.4	↓
Restaurants	19.2	26.6	↑
Business/Meeting/Conference	25.2	26.0	↑
Never Been	24.2	25.0	↑
Outdoor Recreation/Nature	23.1	24.7	↑
Appealing Brochures/Websites	17.7	20.4	↑
Recommendation	21.2	19.2	↓

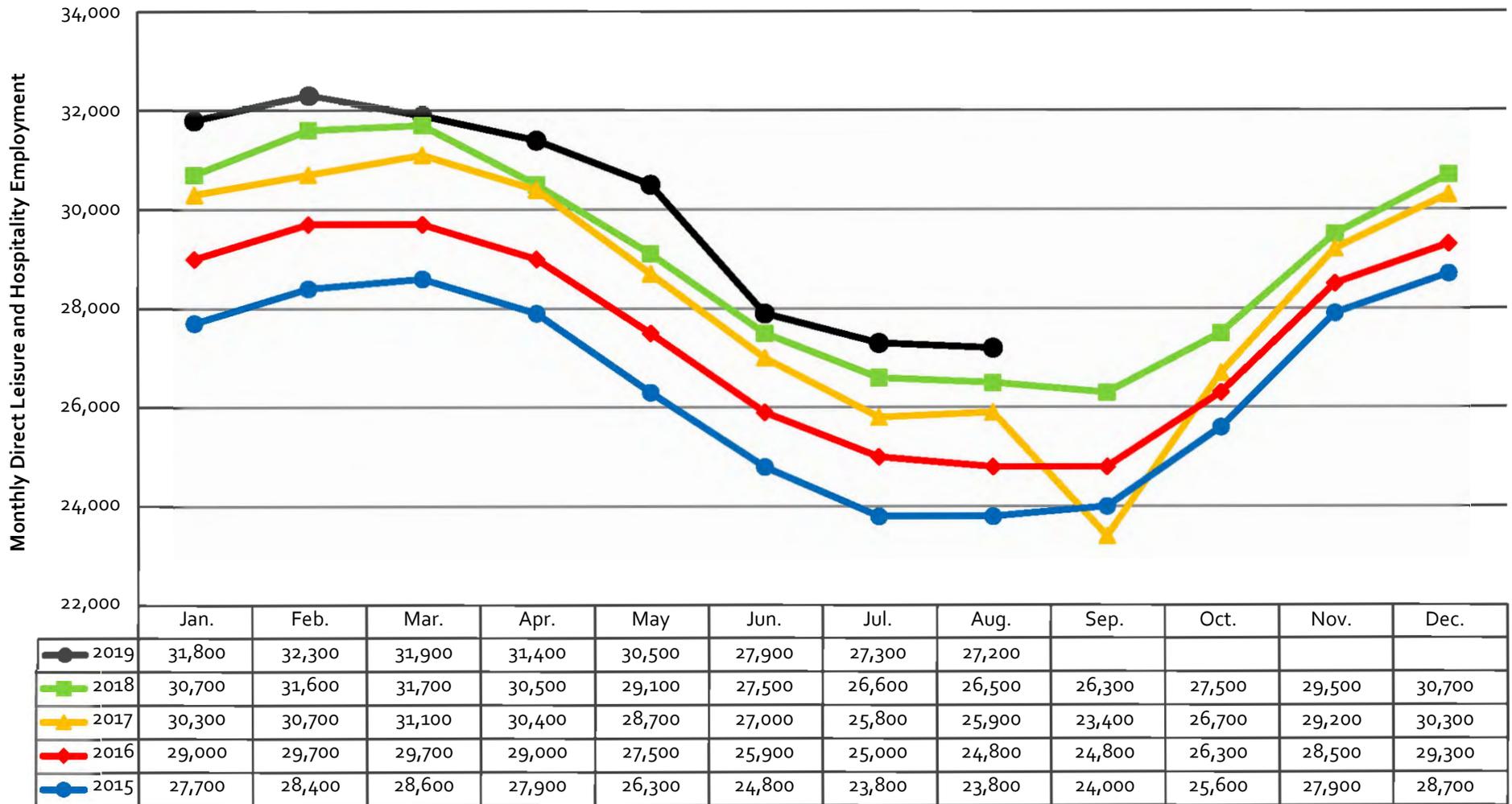
Internet Use	September 2018	September 2019	
Use Internet to Obtain Travel Info for This Trip (% Yes)	95.3%	94.8%	↓
Book Reservations for Trip Online (%Yes)	84.5	83.5	↓



Industry Data: *2015 - 2019*

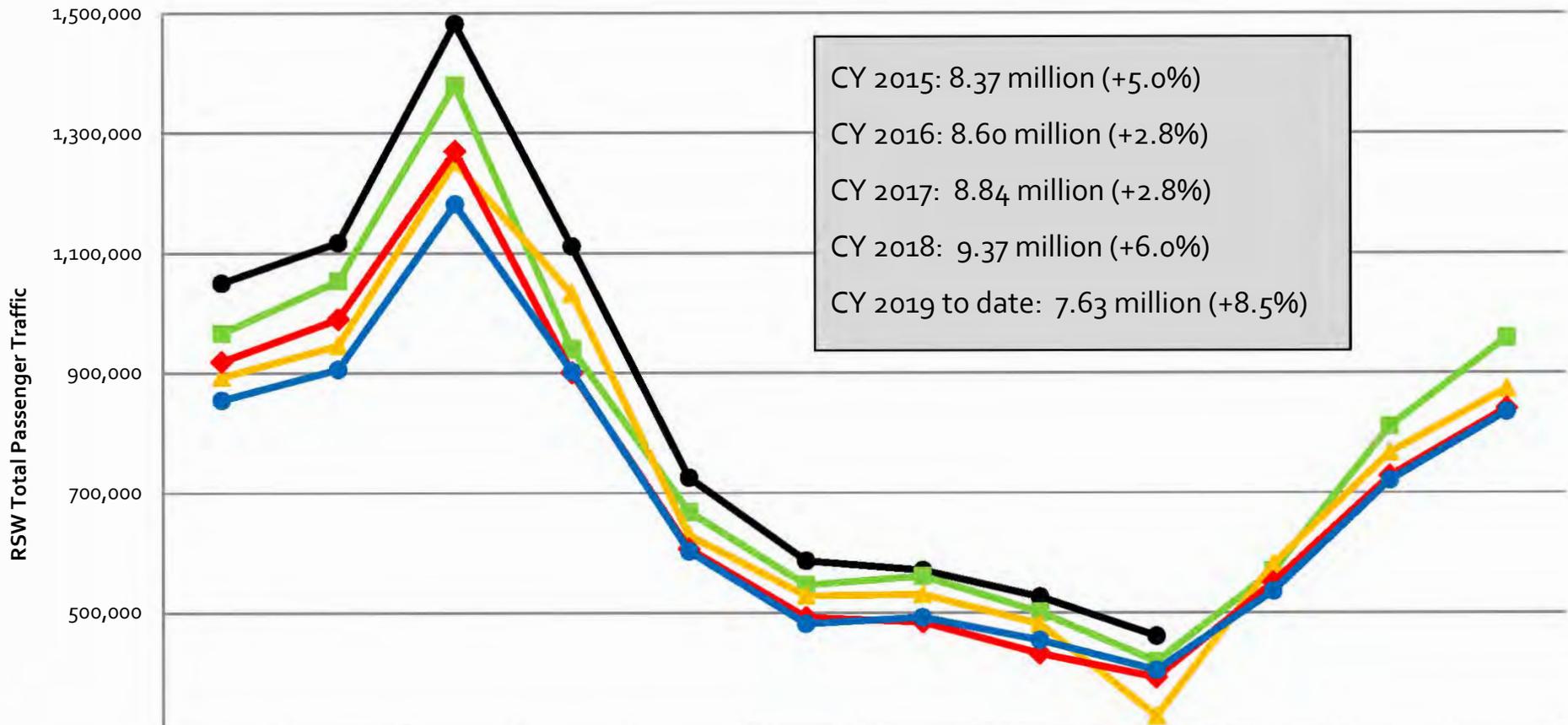


Collier Direct Leisure and Hospitality Employment (Calendar Year) *



* 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



	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	586,319	570,977	526,519	460,869			
■ 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