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## Naples, Marco Island, Everglades Convention and Visitors Bureau October 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](http://www.ResearchDataLLC.com)

November 2019

# Naples, Marco Island, Everglades: October 2019 Summary

## Executive Summary: October 2019

- This October, some **154,000** visitors stayed in Collier's commercial lodgings (**+12.7%**)\*. Their visits contributed an estimated **\$143,132,100** of economic impact to the County (**+16.4%**). Key performance metrics are as follows:

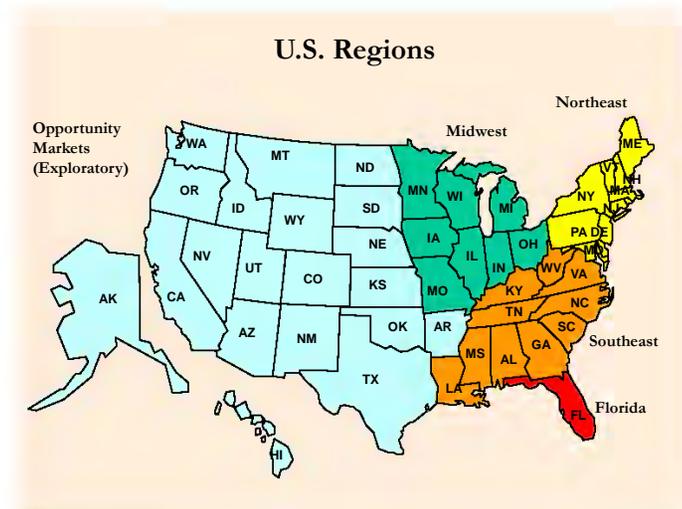
<u>October</u>	<u>2018**</u>	<u>2019</u>	<u>% Δ</u>
Occupancy	64.1%	67.5%	+5.3%
ADR	\$169.4	\$176.7	+4.3%
RevPAR	\$108.6	\$119.3	+9.9%

\* Available records suggest that approximately 15 Collier lodging units remained closed in October 2019. (October 2018: 471 units)

\*\* Red Tide significantly impacted October 2018 occupancy levels.

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

<u>October Visitation</u>	<u>2019</u>	<u>Δ</u>
Florida	61,754	+8.7
Southeast	8,470	+17.0
Northeast	21,560	+2.5
Midwest	22,638	+22.8
Canada	3,080	+25.3
Europe	29,106	+19.0
Other	7,392	+20.3
<b>Total</b>	<b>154,000</b>	<b>+12.7</b>



## Naples, Marco Island, Everglades: October 2019 Summary

3. Compared to last October, **48.5%** of Collier lodging managers report their three month forward reservations levels as “up.”

<b>% of Properties (October)</b>		
<b><u>Reporting Reservations:</u></b>	<b><u>2018</u></b>	<b><u>2019</u></b>
Up	49.7%	48.5%
Same	25.8	47.2
Down	24.5	4.3

4. This October, over half of the destination’s visitor parties flew (2018: 54.0%; 2019: 56.9%). A majority of these (62.7%) deplaned at RSW, with Miami capturing some 19.8% of deplanements.
5. This October, visitor party size averaged 2.4 travelers who stayed for 3.2 nights in the Naples, Marco Island, Everglades area (2018: 2.5 people; 3.3 nights).
6. Some 36.1% of Collier’s October visitors are in the destination for the first time.
7. Fully 92.1% consult the web for trip information, with some 90.4% making bookings for their trip online.
8. The majority (97.4%) are satisfied with their Collier stay, with 95.6% planning a future trip to the area.
9. The typical October visitor is 47.7 years of age.

# Naples, Marco Island, Everglades: *October 2019 Visitor Profile*

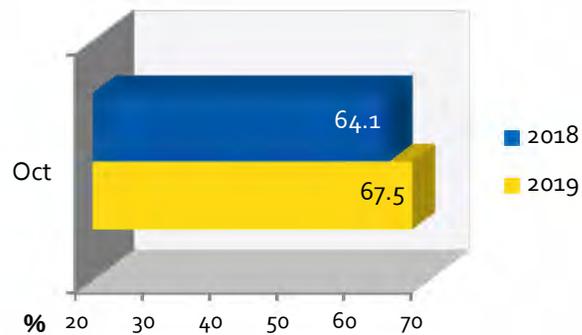


# Naples, Marco Island, Everglades Visitor Profile | October 2019

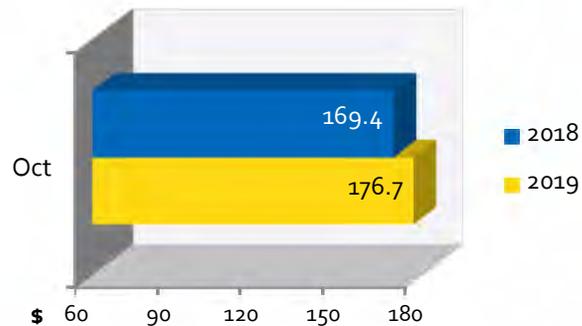
H/M/C+ Visitor Statistics	Year to Date (January – October)			October		
	2018	2019	% Δ '18/'19	2018	2019**	% Δ '18/'19
Visitors (#)	1,506,700	1,593,100	+5.7	136,600	154,000	+12.7
Room Nights	1,993,300	2,120,200	+6.4	172,100	195,700	+13.7
Direct Exp. (\$)	\$1,186,745,900	\$1,282,975,700	+8.1	\$82,475,000	\$95,997,400	+16.4
<b>Total Eco. Impact (\$)</b>	<b>\$1,769,438,200</b>	<b>\$1,912,916,700</b>	<b>+8.1</b>	<b>\$122,970,200</b>	<b>\$143,132,100</b>	<b>+16.4</b>

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

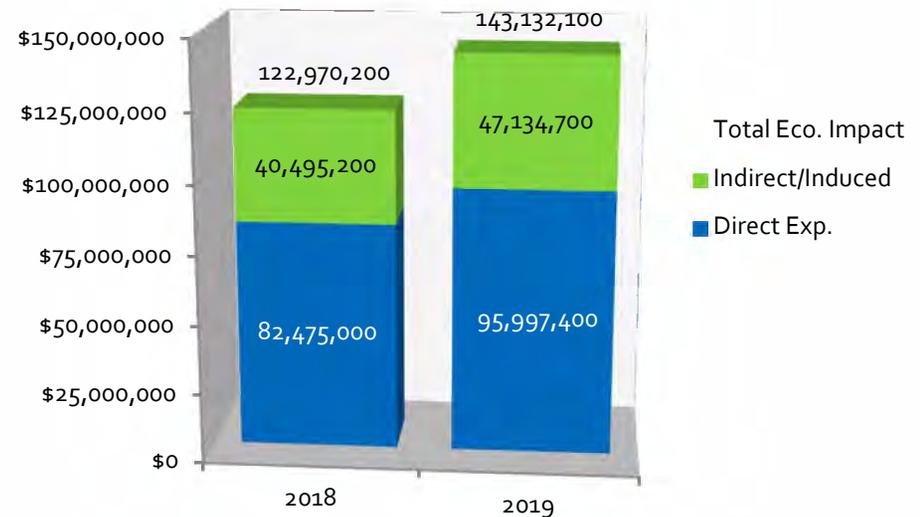
October Occupancy



October Room Rates



October Economic Impact



October

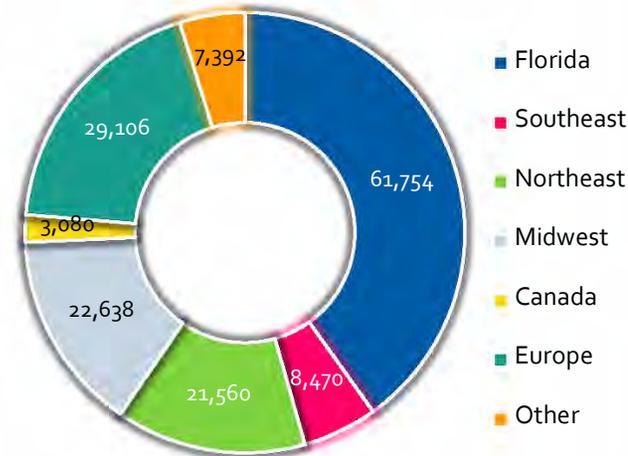
Lodging Statistics	2018	2019**	% Δ '18/'19
Occupancy	64.1%	67.5%	+5.3
Room Rates	\$169.4	\$176.7	+4.3
RevPAR	\$108.6	\$119.3	+9.9

\*\* Note: Available records suggest that approximately 15 Collier lodging units remained closed in October 2019. (October 2018: 471 units). Red Tide significantly impacted October 2018 occupancy levels.

October 2019 Visitor Origin Markets

Visitor Origins	2018		2019		% Δ '18/'19
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	41.6%	56,826	40.1%	61,754	+8.7
Southeast	5.3	7,240	5.5	8,470	+17.0
Northeast	15.4	21,036	14.0	21,560	+2.5
Midwest	13.5	18,441	14.7	22,638	+22.8
Canada	1.8	2,459	2.0	3,080	+25.3
Europe	17.9	24,451	18.9	29,106	+19.0
Other	4.5	6,147	4.8	7,392	+20.3
<b>Total</b>	<b>100.0</b>	<b>136,600</b>	<b>100.0</b>	<b>154,000</b>	<b>+12.7</b>

October 2019 Visitor Origins



# Naples, Marco Island, Everglades Visitor Profile | October 2019

Transportation Mode (Multiple Response)	October 2018	October 2019	
Plane	54.0%	56.9%	↑
Rental Car	52.0	53.7	↑
Personal Car	45.7	43.1	↓

Airport Deplened (Base: Flew)	October 2018	October 2019	
Southwest Florida International	61.0%	62.7%	↑
Miami International	20.1	19.8	↓
Orlando International/Sanford	7.2	8.1	↑
Ft. Lauderdale International	5.5	5.3	↓
Tampa International	5.1	3.3	↓

Purpose of Trip (Multiple Response)	October 2018	October 2019	
Vacation/Weekend Getaway	64.2%	62.4%	↓
Group Travel	37.1	37.7	↑
Visit with Friends and Relatives	11.4	13.3	↑
Special Event	6.9	8.0	↑

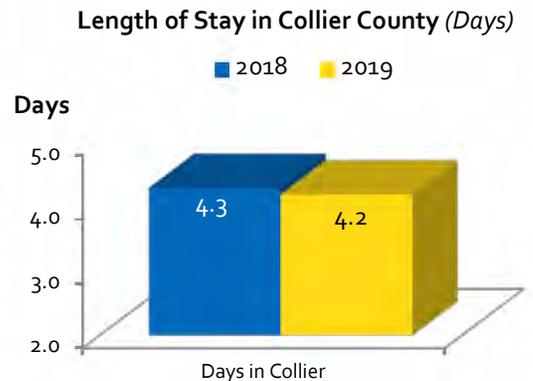
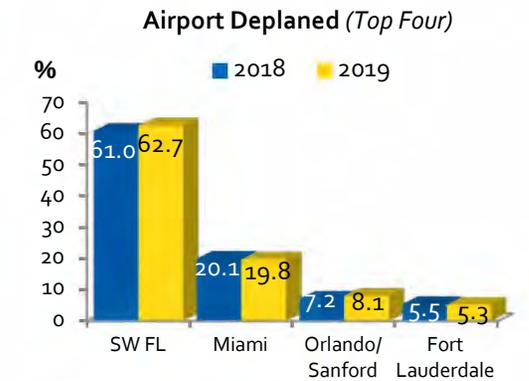
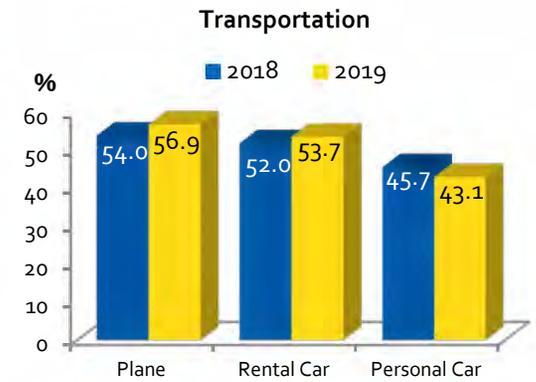
First Visit to (% yes)	October 2018	October 2019	
Collier County	38.4%	36.1%	↓
Florida	5.0	4.0	↓

Length of Stay (Days)	October 2018	October 2019	
In Collier County	4.3	4.2	↓

Party Size	October 2018	October 2019	
Number of People	2.5	2.4	↓



# Naples, Marco Island, Everglades Visitor Profile | October 2019

<b>Party Composition</b> <i>(Multiple Response)</i>	October 2018	October 2019	
Couple	59.2%	60.0%	↑
Family	27.8	26.2	↓
Single	12.8	13.9	↑
Group of Friends	5.6	7.6	↑

<b>Did Party Have Lodging Reservations for Stay</b>	October 2018	October 2019	
% Yes	95.9%	97.3%	↑

<b>Expense Relative to Expectations</b>	October 2018	October 2019	
More Expensive	13.6%	16.0%	↑
Less Expensive	4.1	3.4	↓
As Expected	76.1	73.3	↓

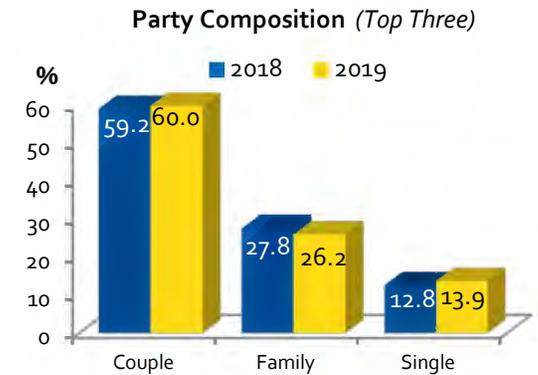
<b>Satisfaction with Collier County</b>	October 2018	October 2019	
Very Satisfied	88.0%	90.9%	↑
Satisfied	9.1	6.5	↓
<b>Satisfaction Level (Combined)</b>	<b>97.1%</b>	<b>97.4%</b>	<b>↑</b>

<b>Recommend Collier to Friends/Relatives</b>	October 2018	October 2019	
% Yes	96.4%	97.0%	↑

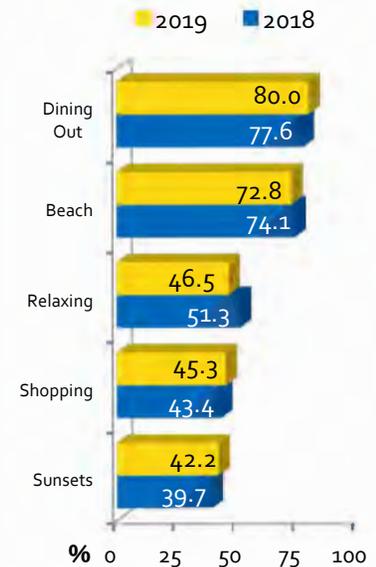
<b>Plan to Return (% Yes)</b>	October 2018	October 2019	
To Local Area	93.8%	95.6%	↑



# Naples, Marco Island, Everglades Visitor Profile | October 2019

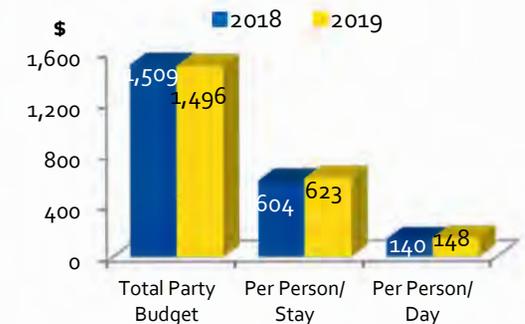
Activities Enjoyed in Area (Multiple Response)	October 2018	October 2019	
Dining Out	77.6%	80.0%	↑
Beach	74.1	72.9	↓
Relaxing	51.3	46.5	↓
Shopping	43.4	45.3	↑
Sunsets	39.7	42.2	↑
Pool	34.3	31.5	↓
Swimming	25.8	24.7	↓
Enjoying Nature/Bird Watching/Everglades	21.7	24.0	↑
Walking	22.5	22.0	↓
Reading	20.4	20.0	↓
Sightseeing	21.1	19.8	↓
Bars/Nightlife	18.4	19.6	↑
Sunning	19.3	17.7	↓
Visiting with Friends/Relatives	14.6	17.2	↑
Art Galleries/Shows/Fairs	14.8	15.4	↑
Canoeing/Kayaking	9.2	13.1	↑
Shelling	11.3	10.1	↓
Golfing	5.0	7.1	↑
Fishing	4.7	6.9	↑

Activities Enjoyed in Area (Top Five)



Demographics	October 2018	October 2019	
Average Age Head of Household (Years)	46.7	47.7	↑
Median Annual Household Income	\$160,044	\$161,081	↑

Collier Base Budgets



Collier Base Budget	October 2018	October 2019
Total	\$1,509.43	\$1,496.06
Per Person/Stay	603.77	623.36
Per Person/Day	140.41	148.42

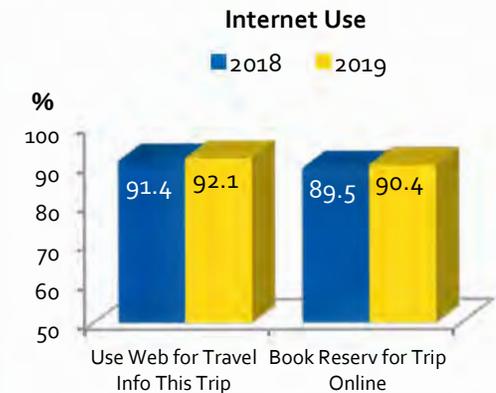
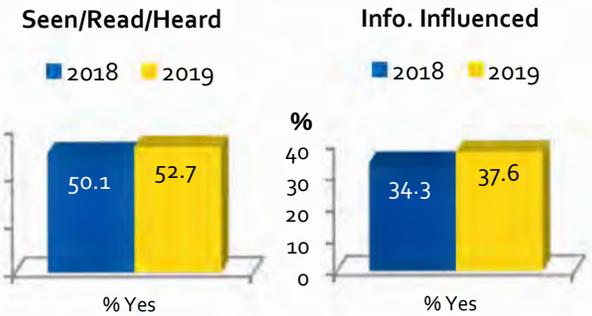
# Naples, Marco Island, Everglades Visitor Profile | October 2019

Area Information Seen/Read/Heard	October 2018	October 2019	
% Yes	50.1%	52.7%	↑

Directly Influenced by Information (Base: Seen/Read/Heard Area Information)	October 2018	October 2019	
% Yes	34.3%	37.6%	↑

Why Chose the Area (Multiple Response)	October 2018	October 2019	
Beach Area	54.8%	53.7%	↓
Quiet/Peaceful/Laid Back	50.1	46.7	↓
Relaxing	49.7	44.3	↓
Previous Experience	40.4	41.9	↑
Weather	37.6	40.0	↑
Business/Meeting/Conference	35.2	36.7	↑
Quality of Accommodations	33.9	35.3	↑
Appealing Brochures/Websites	32.2	29.7	↓
Restaurants	22.9	29.3	↑
Not Crowded	28.2	22.7	↓
Recommendation	19.7	20.5	↑
Never Been	20.1	18.6	↓
Outdoor Recreation/Nature	13.8	18.1	↑
Visiting With Family/Friends	9.9	11.3	↑

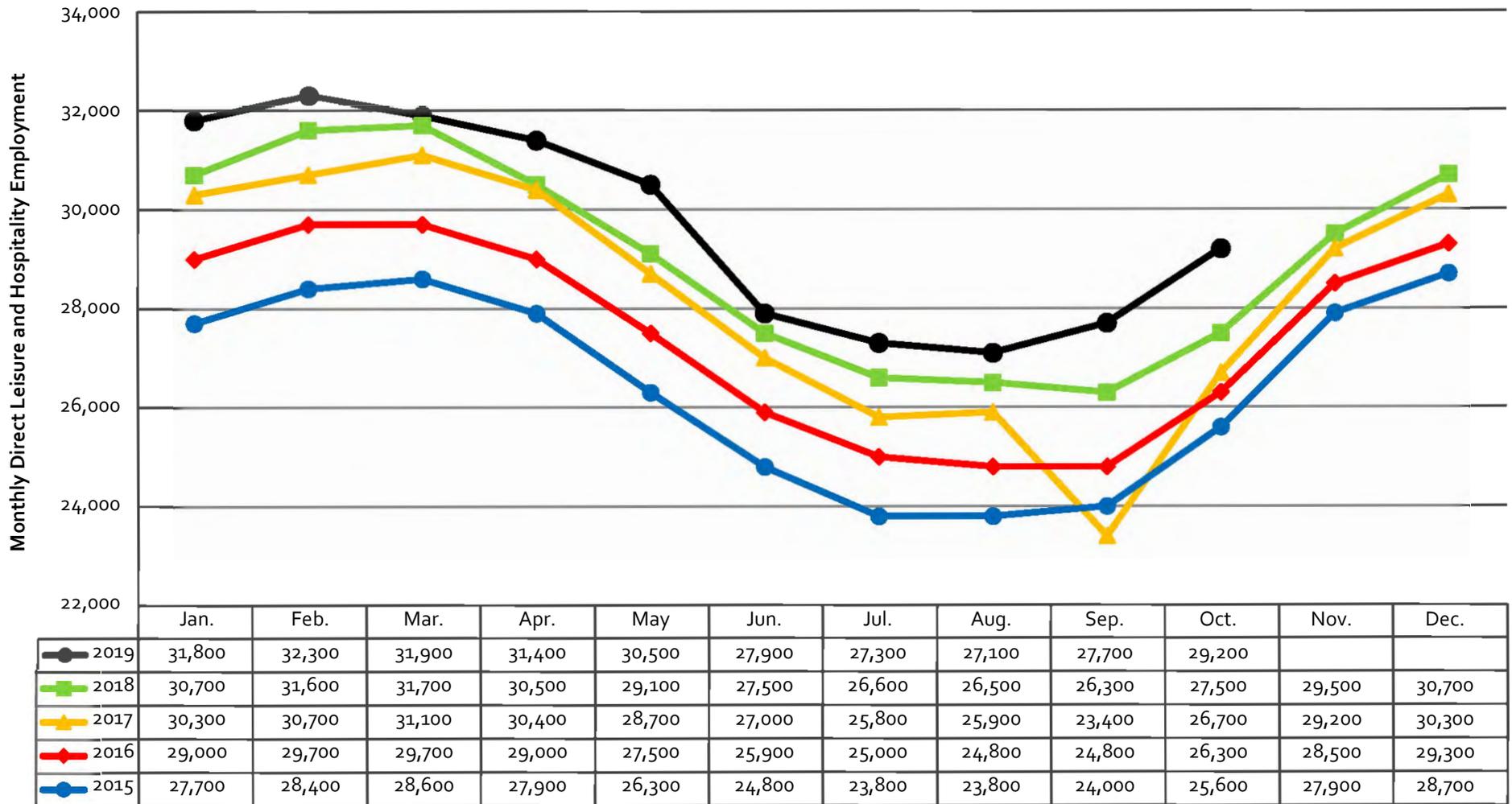
Internet Use	October 2018	October 2019	
Use Internet to Obtain Travel Info for This Trip (% Yes)	91.4%	92.1%	↑
Book Reservations for Trip Online (%Yes)	89.5	90.4	↑



## Industry Data: *2015 - 2019*

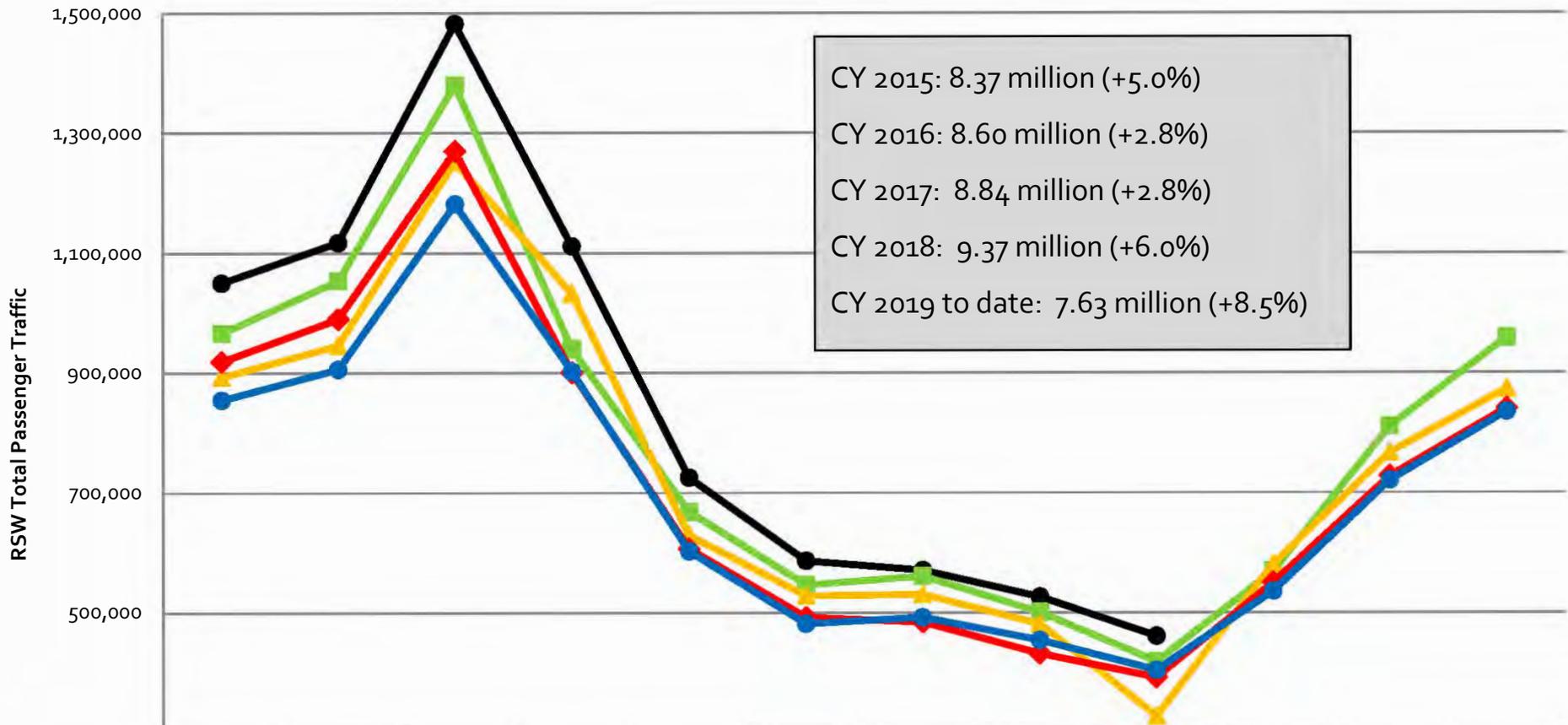


Collier Direct Leisure and Hospitality Employment (Calendar Year) \*



\* 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