

RESEARCH DATA SERVICES, INC.

777 SOUTH HARBOUR ISLAND BOULEVARD • SUITE 260
TAMPA, FLORIDA 33602
TEL (813) 254-2975 • FAX (813) 223-2986



Naples, Marco Island, Everglades Convention and Visitors Bureau
July 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

August 2019

Naples, Marco Island, Everglades: July 2019 Summary

Executive Summary: July 2019

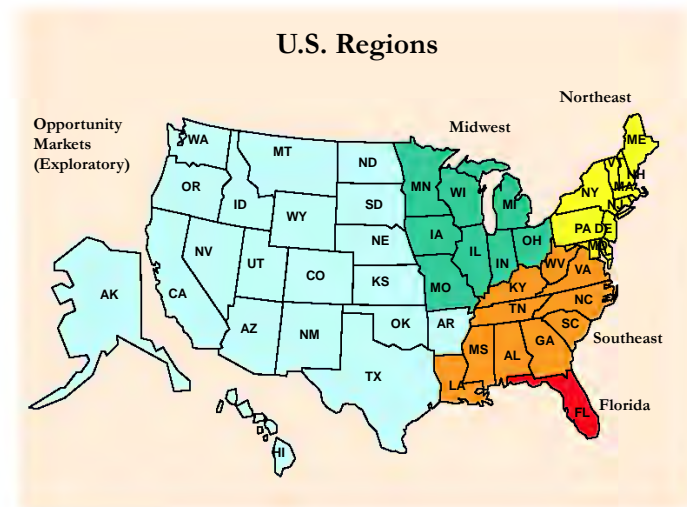
- This July, some **146,000** visitors stayed in Collier's commercial lodgings (+7.6%)*. Their visits contributed an estimated **\$147,839,200** of economic impact to the County (+8.7%). Key performance metrics are as follows:

| <u>July</u> | <u>2018</u> | <u>2019</u> | <u>% Δ</u> |
|-------------|-------------|-------------|------------|
| Occupancy | 76.2% | 73.4% | -3.7% |
| ADR | \$164.4 | \$174.2 | +6.0% |
| RevPAR | \$125.3 | \$127.9 | +2.1% |

* Available records suggest that approximately 15 Collier lodging units remained closed in July 2019. (July 2018: 1,058 units)

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

| <u>July Visitation</u> | <u>2019</u> <u>Visitor #</u> | <u>Δ</u> |
|------------------------|---------------------------------|-------------|
| Florida | 74,460 | +7.0 |
| Southeast | 8,906 | +11.2 |
| Northeast | 17,228 | +4.9 |
| Midwest | 11,096 | +12.0 |
| Canada | 2,044 | +67.4 |
| Europe | 23,214 | +2.4 |
| Other | 9,052 | +15.0 |
| Total | 146,000 | +7.6 |



Naples, Marco Island, Everglades: July 2019 Summary

3. Compared to last July, **49.2%** of Collier lodging managers report their three month forward reservations levels as “up.”

| % of Properties (July) | 2018 | 2019 |
|--------------------------------|-------------|-------------|
| Reporting Reservations: | | |
| Up | 50.0% | 49.2% |
| Same | 30.8 | 29.3 |
| Down | 19.2 | 21.5 |

4. This July, almost half of the destination’s visitor parties flew (2018: 48.7%; 2019: 49.2%). A majority of these (57.6%) deplaned at RSW, with Miami capturing some 20.8% of deplanements.
5. This July, visitor party size averaged 2.9 travelers who stayed for 3.0 nights in the Naples, Marco Island, Everglades area (2018: 3.0 people; 3.1 nights).
6. Some 44.9% of Collier’s July visitors are in the destination for the first time.
7. Fully 98.8% consult the web for trip information, with some 87.3% making bookings for their trip online.
8. The majority (96.3%) are satisfied with their Collier stay, with 92.2% planning a future trip to the area.
9. The typical July visitor is 43.6 years of age.

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

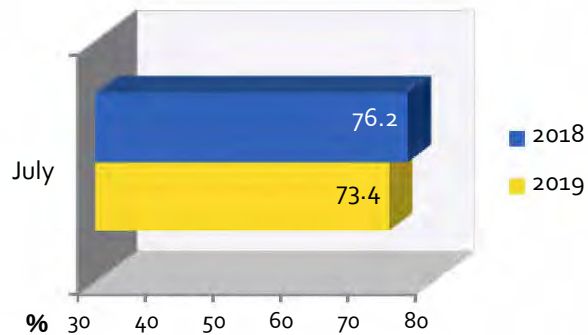


Naples, Marco Island, Everglades Visitor Profile | July 2019

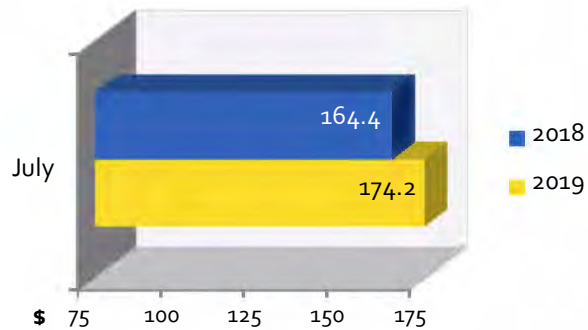
| H/M/C+ Visitor Statistics | Year to Date (January – July) | | | July | | |
|-------------------------------|-------------------------------|------------------------|-------------|----------------------|----------------------|-------------|
| | 2018 | 2019 | % Δ '18/'19 | 2018 | 2019** | % Δ '18/'19 |
| Visitors (#) | 1,181,200 | 1,234,100 | +4.5 | 135,700 | 146,000 | +7.6 |
| Room Nights | 1,516,500 | 1,595,900 | +5.2 | 187,700 | 201,400 | +7.3 |
| Direct Exp. (\$) | \$994,890,800 | \$1,064,503,700 | +7.0 | \$91,201,300 | \$99,154,400 | +8.7 |
| Total Eco. Impact (\$) | \$1,483,382,300 | \$1,587,174,900 | +7.0 | \$135,981,100 | \$147,839,200 | +8.7 |

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

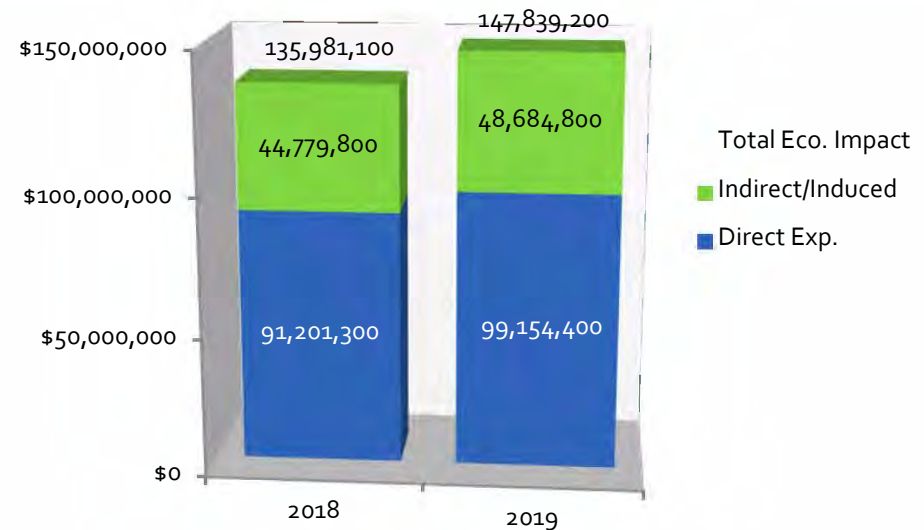
July Occupancy



July Room Rates



July Economic Impact



July

Lodging Statistics

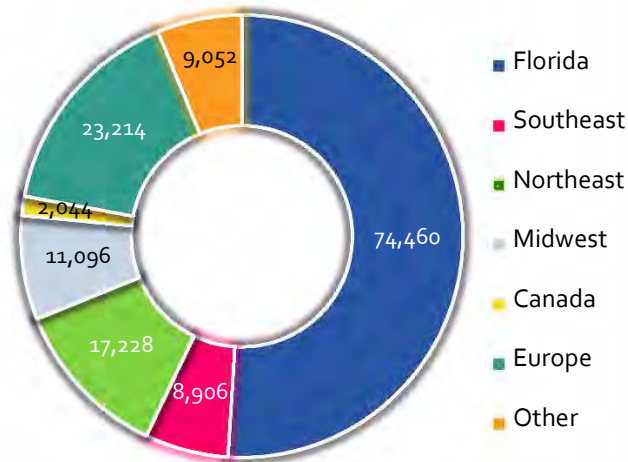
| | 2018 | 2019** | % Δ '18/'19 |
|------------|---------|---------|-------------|
| Occupancy | 76.2% | 73.4% | -3.7 |
| Room Rates | \$164.4 | \$174.2 | +6.0 |
| RevPAR | \$125.3 | \$127.9 | +2.1 |

** Note: Available records suggest that approximately 15 Collier lodging units remained closed in July 2019. (July 2018: 1,058 units).

July 2019 Visitor Origin Markets

| Visitor Origins | 2018 | | 2019 | | % Δ '18/'19 |
|-----------------|------------------|--------------------|------------------|--------------------|-------------|
| | Share of Mkt (%) | Number of Visitors | Share of Mkt (%) | Number of Visitors | |
| Florida | 51.3% | 69,614 | 51.0% | 74,460 | +7.0 |
| Southeast | 5.9 | 8,006 | 6.1 | 8,906 | +11.2 |
| Northeast | 12.1 | 16,420 | 11.8 | 17,228 | +4.9 |
| Midwest | 7.3 | 9,906 | 7.6 | 11,096 | +12.0 |
| Canada | 0.9 | 1,221 | 1.4 | 2,044 | +67.4 |
| Europe | 16.7 | 22,662 | 15.9 | 23,214 | +2.4 |
| Other | 5.8 | 7,871 | 6.2 | 9,052 | +15.0 |
| Total | 100.0 | 135,700 | 100.0 | 146,000 | +7.6 |

July 2019 Visitor Origins



Naples, Marco Island, Everglades Visitor Profile | July 2019

| Transportation Mode (Multiple Response) | July 2018 | July 2019 | |
|---|-----------|-----------|---|
| Personal Car | 50.0% | 50.4% | ↑ |
| Plane | 48.7 | 49.2 | ↑ |
| Rental Car | 45.2 | 44.5 | ↓ |

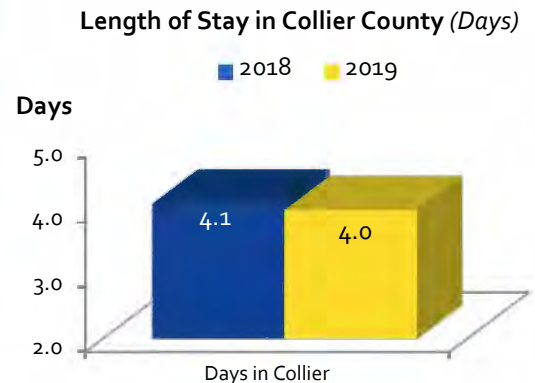
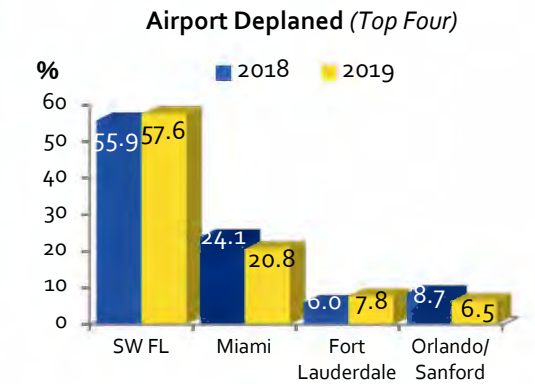
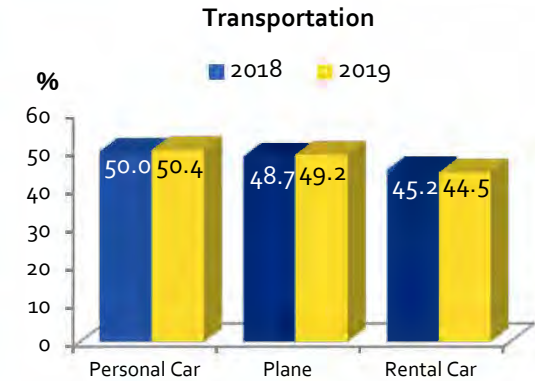
| Airport Deplened (Base: Flew) | July 2018 | July 2019 | |
|---------------------------------|-----------|-----------|---|
| Southwest Florida International | 55.9% | 57.6% | ↑ |
| Miami International | 24.1 | 20.8 | ↓ |
| Ft. Lauderdale International | 6.0 | 7.8 | ↑ |
| Orlando International/Sanford | 8.7 | 6.5 | ↓ |
| Tampa International | 4.0 | 5.6 | ↑ |

| Purpose of Trip (Multiple Response) | July 2018 | July 2019 | |
|-------------------------------------|-----------|-----------|---|
| Vacation/Weekend Getaway | 85.3% | 83.3% | ↓ |
| Group Travel | 22.9 | 26.7 | ↑ |
| Visit with Friends and Relatives | 11.4 | 9.7 | ↓ |
| Special Event | 3.4 | 4.4 | ↑ |

| First Visit to (% yes) | July 2018 | July 2019 | |
|------------------------|-----------|-----------|---|
| Collier County | 43.0% | 44.9% | ↑ |
| Florida | 7.4 | 5.1 | ↓ |

| Length of Stay (Days) | July 2018 | July 2019 | |
|-----------------------|-----------|-----------|---|
| In Collier County | 4.1 | 4.0 | ↓ |

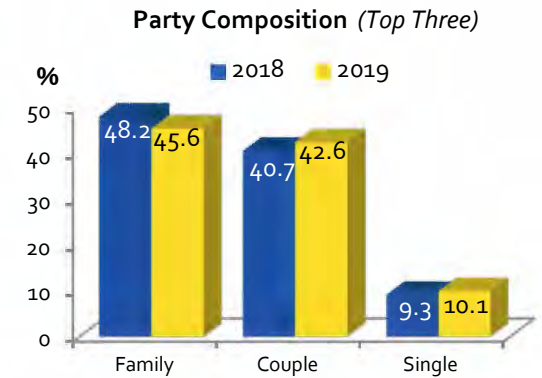
| Party Size | July 2018 | July 2019 | |
|------------------|-----------|-----------|---|
| Number of People | 3.0 | 2.9 | ↓ |



Naples, Marco Island, Everglades Visitor Profile | July 2019

Party Composition (Multiple Response)

| | July 2018 | July 2019 | |
|------------------|-----------|-----------|---|
| Family | 48.2% | 45.6% | ↓ |
| Couple | 40.7 | 42.6 | ↑ |
| Single | 9.3 | 10.1 | ↑ |
| Group of Friends | 3.7 | 3.5 | ↓ |

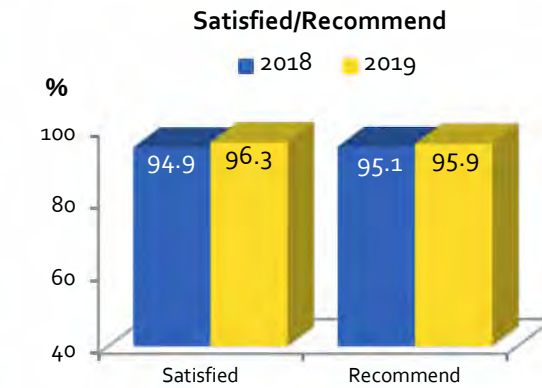


Did Party Have Lodging Reservations for Stay

| | July 2018 | July 2019 | |
|-------|-----------|-----------|---|
| % Yes | 95.6% | 96.7% | ↑ |

Expense Relative to Expectations

| | July 2018 | July 2019 | |
|----------------|-----------|-----------|---|
| More Expensive | 17.8% | 16.4% | ↓ |
| Less Expensive | 3.6 | 1.7 | ↓ |
| As Expected | 74.6 | 77.3 | ↑ |

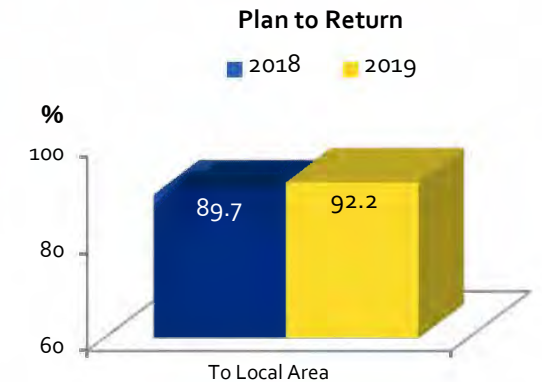


Satisfaction with Collier County

| | July 2018 | July 2019 | |
|--------------------------------------|--------------|--------------|----------|
| Very Satisfied | 86.5% | 86.7% | ↑ |
| Satisfied | 8.4 | 9.6 | ↑ |
| Satisfaction Level (Combined) | 94.9% | 96.3% | ↑ |

Recommend Collier to Friends/Relatives

| | July 2018 | July 2019 | |
|-------|-----------|-----------|---|
| % Yes | 95.1% | 95.9% | ↑ |



Plan to Return (% Yes)

| | July 2018 | July 2019 | |
|---------------|-----------|-----------|---|
| To Local Area | 89.7% | 92.2% | ↑ |

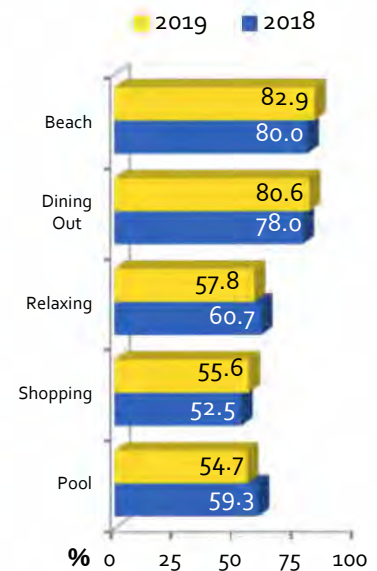
Naples, Marco Island, Everglades Visitor Profile | July 2019

| Activities Enjoyed in Area (Multiple Response) | July 2018 | July 2019 | |
|--|-----------|-----------|---|
| Beach | 80.0% | 82.9% | ↑ |
| Dining Out | 78.0 | 80.6 | ↑ |
| Relaxing | 60.7 | 57.8 | ↓ |
| Shopping | 52.5 | 55.6 | ↑ |
| Pool | 59.3 | 54.7 | ↓ |
| Sunsets | 35.6 | 38.3 | ↑ |
| Sightseeing | 36.4 | 35.6 | ↓ |
| Swimming | 34.6 | 33.6 | ↓ |
| Sunning | 30.7 | 28.8 | ↓ |
| Enjoying Nature/Bird Watching/Everglades | 26.9 | 26.5 | ↓ |
| Reading | 20.6 | 24.8 | ↑ |
| Bars/Nightlife | 23.4 | 24.5 | ↑ |
| Walking | 21.5 | 18.7 | ↓ |
| Shelling | 16.3 | 17.6 | ↑ |
| Fishing | 10.2 | 12.7 | ↑ |
| Visiting with Friends/Relatives | 13.6 | 11.5 | ↓ |
| Art Galleries/Shows/Fairs | 11.9 | 10.6 | ↓ |
| Golfing | 7.4 | 7.2 | ↓ |

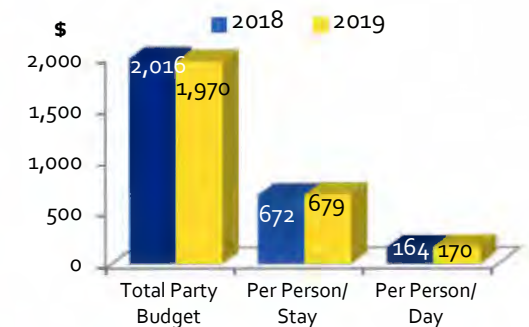
| Demographics | July 2018 | July 2019 | |
|---------------------------------------|-----------|-----------|---|
| Average Age Head of Household (Years) | 44.3 | 43.6 | ↓ |
| Median Annual Household Income | \$141,802 | \$144,542 | ↑ |

| Collier Base Budget | July 2018 | July 2019 | |
|---------------------|------------|------------|---|
| Total | \$2,016.25 | \$1,969.51 | ↓ |
| Per Person/Stay | 672.08 | 679.14 | ↑ |
| Per Person/Day | 163.92 | 169.79 | ↑ |

Activities Enjoyed in Area (Top Five)

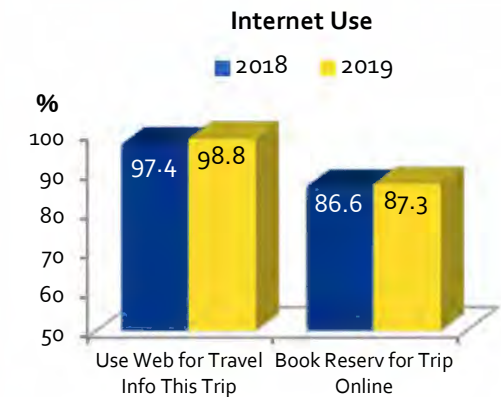
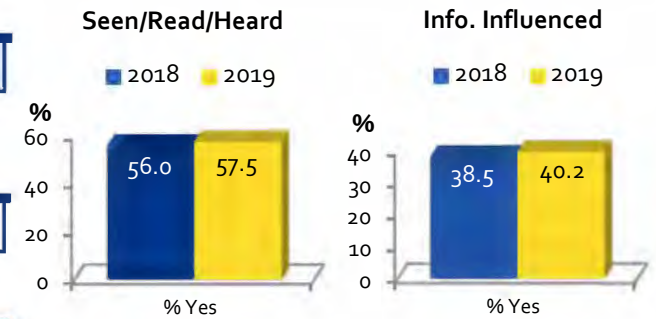


Collier Base Budgets



Naples, Marco Island, Everglades Visitor Profile | July 2019

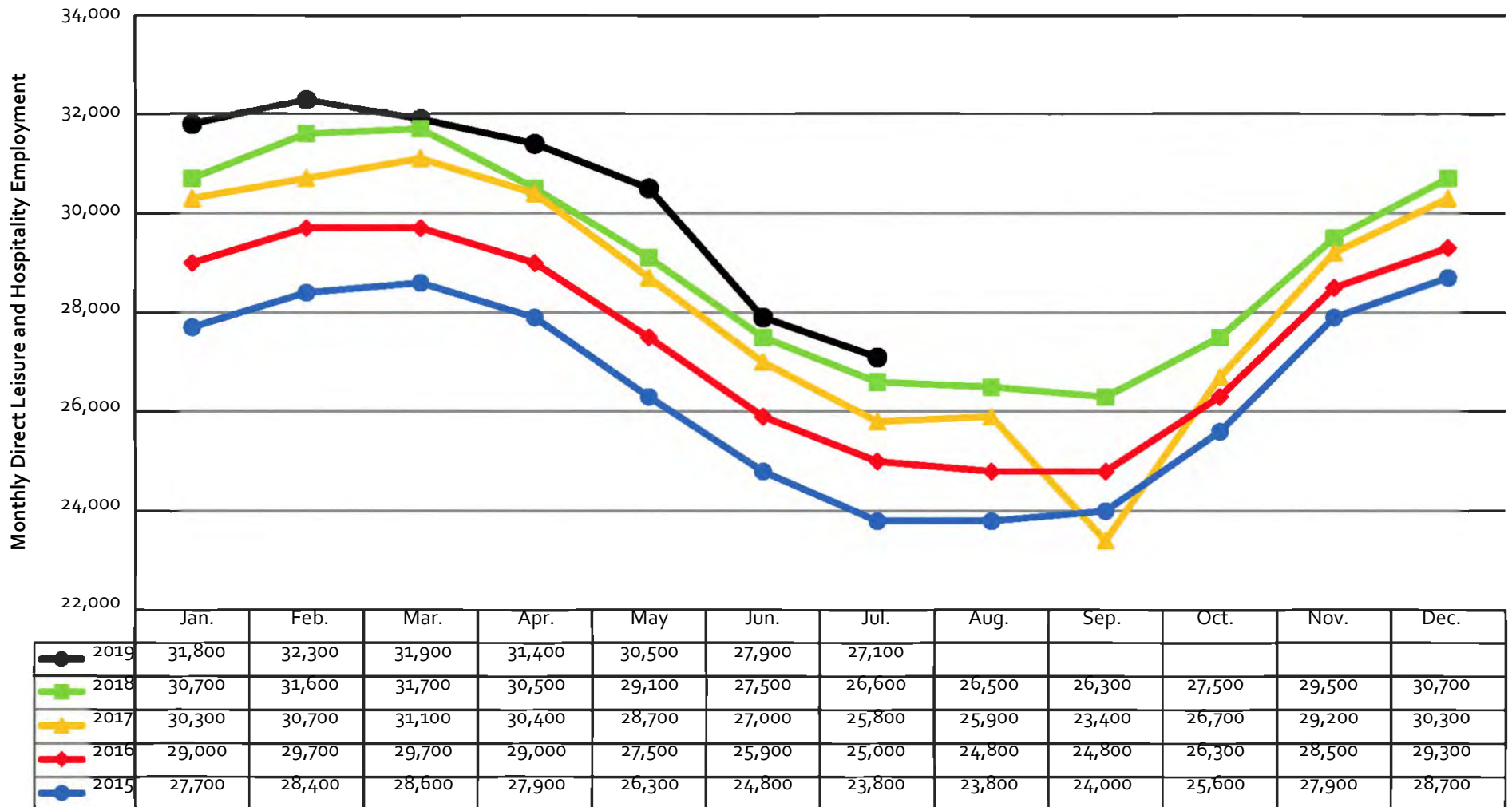
| Area Information Seen/Read/Heard | July 2018 | July 2019 | |
|---|-----------|-----------|---|
| % Yes | 56.0% | 57.5% | ↑ |
| Directly Influenced by Information (Base: Seen/Read/Heard Area Information) | | | |
| | July 2018 | July 2019 | |
| % Yes | 38.5% | 40.2% | ↑ |
| Why Chose the Area (Multiple Response) | | | |
| | July 2018 | July 2019 | |
| Beach Area | 60.3% | 59.2% | ↓ |
| Quality of Accommodations | 41.4 | 46.0 | ↑ |
| Quiet/Peaceful/Laid Back | 43.1 | 43.6 | ↑ |
| Relaxing | 44.7 | 41.7 | ↓ |
| Appealing Brochures/Websites | 34.1 | 36.8 | ↑ |
| Restaurants | 37.9 | 35.6 | ↓ |
| Previous Experience | 32.3 | 33.0 | ↑ |
| Weather | 28.7 | 31.7 | ↑ |
| Not Crowded | 32.6 | 30.6 | ↓ |
| Business/Meeting/Conference | 22.0 | 26.2 | ↑ |
| Never Been | 23.0 | 23.7 | ↑ |
| Recommendation | 25.2 | 21.1 | ↓ |
| Outdoor Recreation/Nature | 20.7 | 18.4 | ↓ |
| Internet Use | | | |
| | July 2018 | July 2019 | |
| Use Internet to Obtain Travel Info for This Trip (% Yes) | 97.4% | 98.8% | ↑ |
| Book Reservations for Trip Online (%Yes) | 86.6 | 87.3 | ↑ |



Industry Data:
2015 - 2019

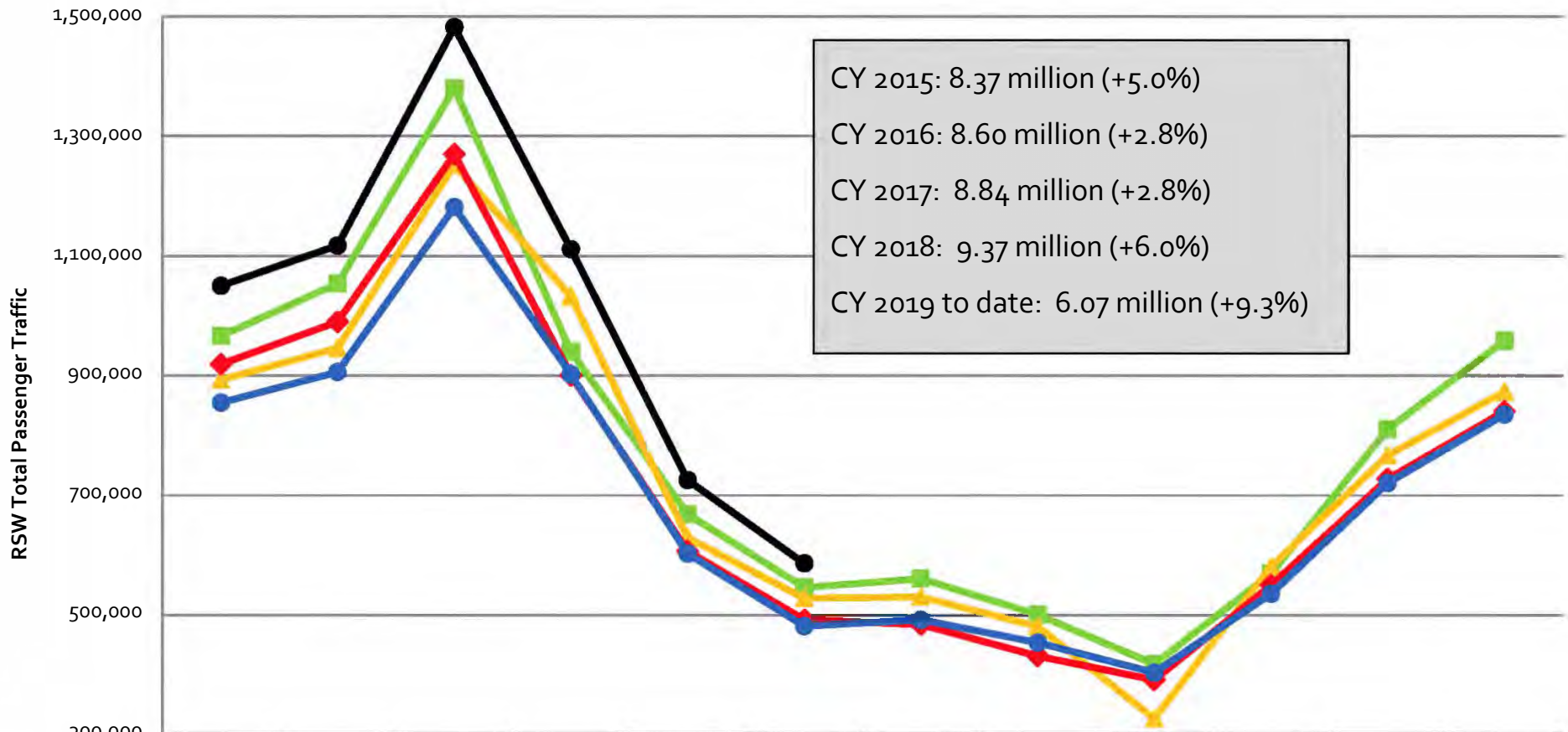


Collier Direct Leisure and Hospitality Employment (Calendar Year) *



* 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 | | | | | | |
| 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 |