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Naples, Marco Island, Everglades Convention and Visitors Bureau
June 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

July 2019

Naples, Marco Island, Everglades: June 2019 Summary

Executive Summary: June 2019

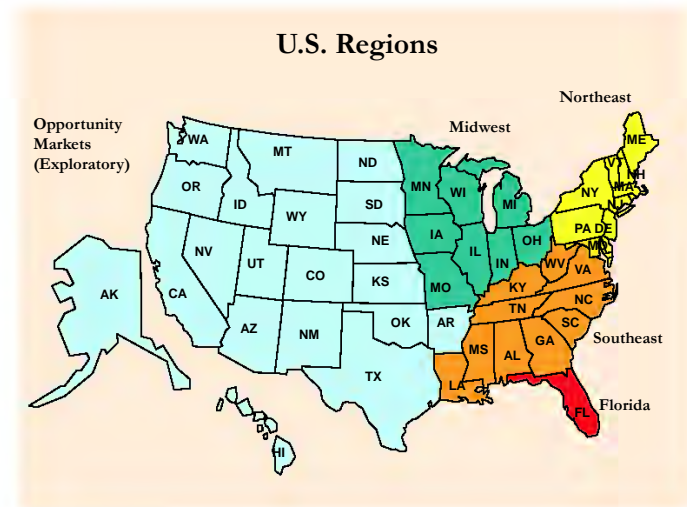
- This June, some **149,200** visitors stayed in Collier's commercial lodgings (**-0.3%**)*. Their visits contributed an estimated **\$161,210,300** of economic impact to the County (**+4.1%**). Key performance metrics are as follows:

<u>June</u>	<u>2018</u>	<u>2019</u>	<u>% Δ</u>
Occupancy	68.4%	65.1%	-4.8%
ADR	\$194.7	\$199.0	+2.2%
RevPAR	\$133.2	\$129.5	-2.8%

* Available records suggest that approximately 15 Collier lodging units remained closed in June 2019. (June 2018: 634 units)

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

<u>June Visitation</u>	<u>2019</u> <u>Visitor #</u>	<u>Δ</u>
Florida	73,108	-2.1
Southeast	11,190	+2.4
Northeast	16,412	-4.7
Midwest	17,755	+7.8
Canada	2,685	+38.0
Europe	17,904	-5.8
Other	10,146	+7.6
Total	149,200	-0.3



Naples, Marco Island, Everglades: June 2019 Summary

3. Compared to last June, **37.2%** of Collier lodging managers report their three month forward reservations levels as “up.”

% of Properties (June)		
<u>Reporting Reservations:</u>	<u>2018</u>	<u>2019</u>
Up	42.0%	37.2%
Same	40.9	42.5
Down	17.1	20.3

4. This June, over half of the destination’s visitor parties flew (*2018: 52.9%; 2019: 52.2%*). A majority of these (**61.7%**) deplaned at RSW, with Miami capturing some **14.6%** of deplanements.
5. This June, visitor party size averaged **2.7** travelers who stayed for **3.0 nights** in the Naples, Marco Island, Everglades area (*2018: 2.8 people; 3.0 nights*).
6. Some **33.7%** of Collier’s June visitors are in the destination for the first time.
7. Fully **96.1%** consult the web for trip information, with some **85.6%** making bookings for their trip online.
8. The majority (**95.4%**) are satisfied with their Collier stay, with **90.9%** planning a future trip to the area.
9. The typical June visitor is **47.9 years of age**.

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

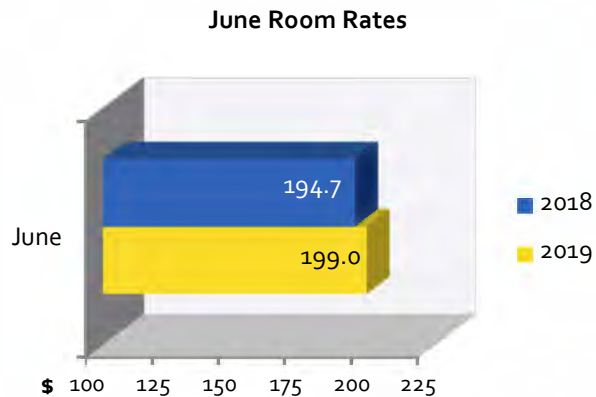
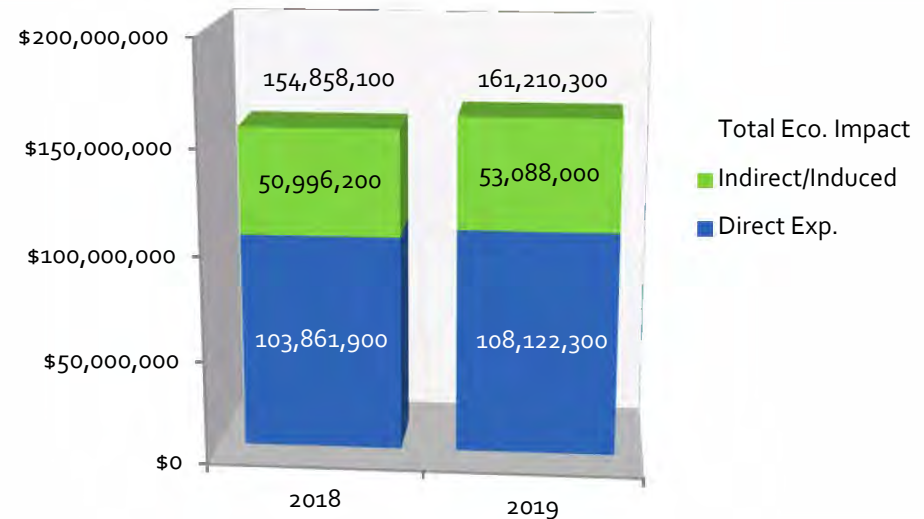
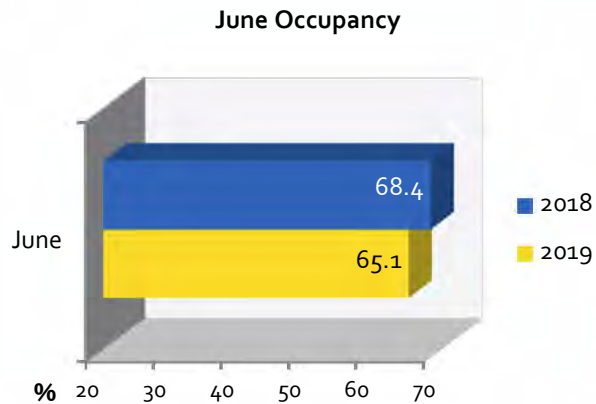


Naples, Marco Island, Everglades Visitor Profile June 2019

H/M/C+ Visitor Statistics	Year to Date (January – June)			June		
	2018	2019	% Δ '18/'19	2018	2019**	% Δ '18/'19
Visitors (#)	1,045,500	1,088,100	+4.1	149,700	149,200	-0.3
Room Nights	1,328,800	1,394,500	+4.9	185,500	187,900	+1.3
Direct Exp. (\$)	\$903,689,500	\$965,349,300	+6.8	\$103,861,900	\$108,122,300	+4.1
Total Eco. Impact (\$)	\$1,347,401,100	\$1,439,335,700	+6.8	\$154,858,100	\$161,210,300	+4.1

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

June Economic Impact



Lodging Statistics

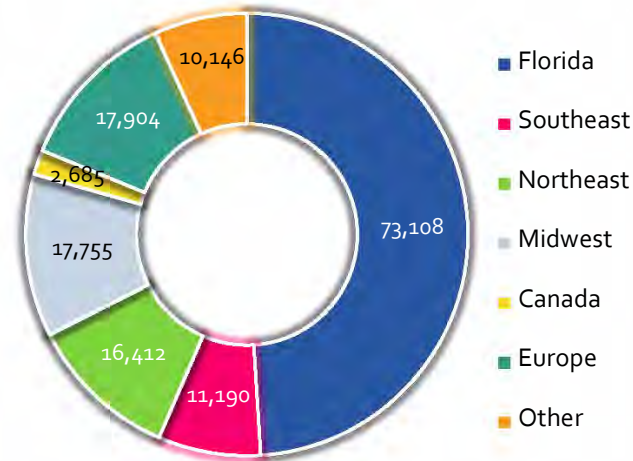
	2018	2019**	% Δ '18/'19
Occupancy	68.4%	65.1%	-4.8
Room Rates	\$194.7	\$199.0	+2.2
RevPAR	\$133.2	\$129.5	-2.8

** Note: Available records suggest that approximately 15 Collier lodging units remained closed in June 2019. (June 2018: 634 units).

June 2019 Visitor Origin Markets

Visitor Origins	2018		2019		% Δ '18/'19
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	49.9%	74,700	49.0%	73,108	-2.1
Southeast	7.3	10,928	7.5	11,190	+2.4
Northeast	11.5	17,216	11.0	16,412	-4.7
Midwest	11.0	16,467	11.9	17,755	+7.8
Canada	1.3	1,946	1.8	2,685	+38.0
Europe	12.7	19,012	12.0	17,904	-5.8
Other	6.3	9,431	6.8	10,146	+7.6
Total	100.0	149,700	100.0	149,200	-0.3

June 2019 Visitor Origins



Naples, Marco Island, Everglades Visitor Profile | June 2019

Transportation Mode (Multiple Response)	June 2018	June 2019	
Plane	52.9%	52.2%	↓
Rental Car	51.0	47.3	↓
Personal Car	47.1	47.8	↑

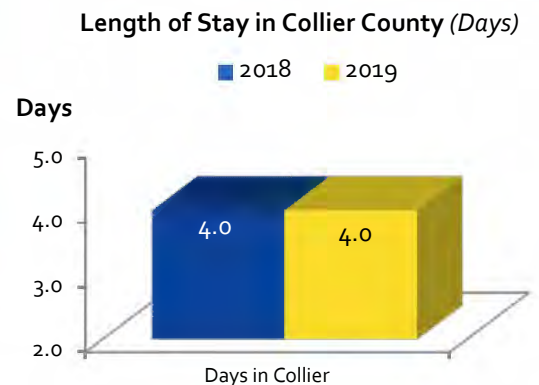
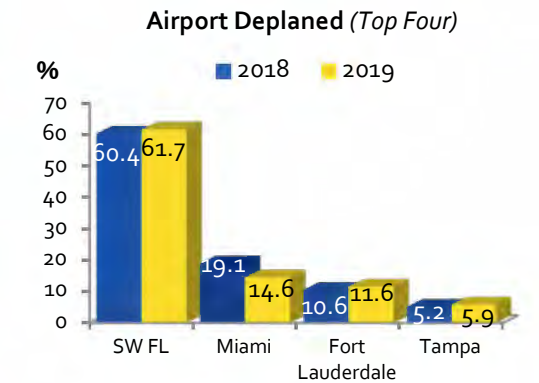
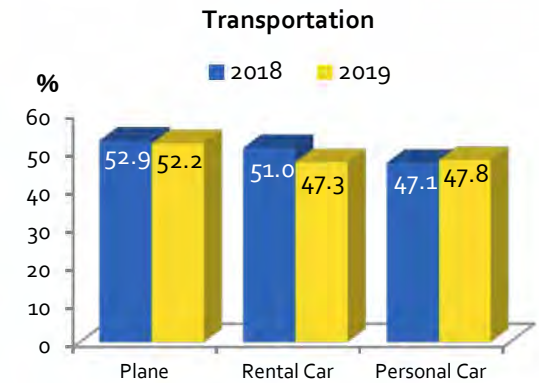
Airport Deplened (Base: Flew)	June 2018	June 2019	
Southwest Florida International	60.4%	61.7%	↑
Miami International	19.1	14.6	↓
Ft. Lauderdale International	10.6	11.6	↑
Tampa International	5.2	5.9	↑
Orlando International/Sanford	4.3	3.8	↓

Purpose of Trip (Multiple Response)	June 2018	June 2019	
Vacation/Weekend Getaway	84.9%	83.0%	↓
Group Travel	22.4	25.0	↑
Visit with Friends and Relatives	8.0	7.5	↓
Special Event	5.5	6.0	↑

First Visit to (% yes)	June 2018	June 2019	
Collier County	35.6%	33.7%	↓
Florida	2.3	2.1	↓

Length of Stay (Days)	June 2018	June 2019	
In Collier County	4.0	4.0	—

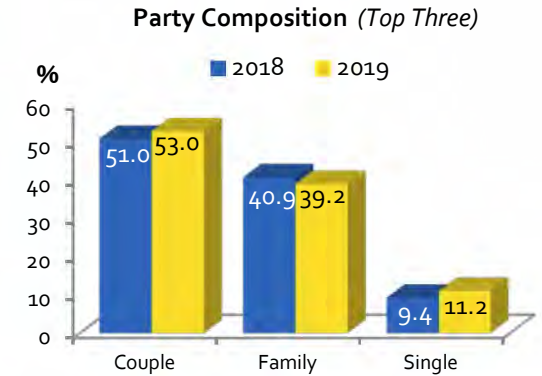
Party Size	June 2018	June 2019	
Number of People	2.8	2.7	↓



Naples, Marco Island, Everglades Visitor Profile | June 2019

Party Composition (Multiple Response)

	June 2018	June 2019	
Couple	51.0%	53.0%	↑
Family	40.9	39.2	↓
Single	9.4	11.2	↑
Group of Friends	3.3	2.0	↓

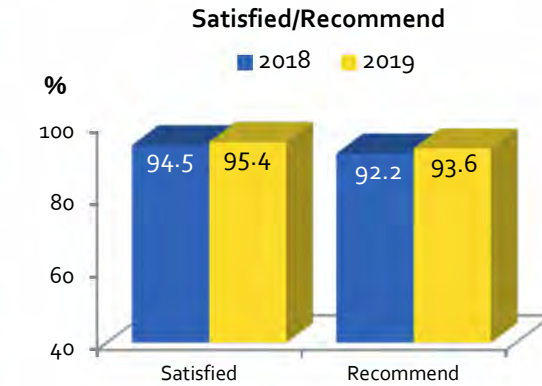


Did Party Have Lodging Reservations for Stay

	June 2018	June 2019	
% Yes	96.4%	96.9%	↑

Expense Relative to Expectations

	June 2018	June 2019	
More Expensive	17.1%	16.2%	↓
Less Expensive	5.3	3.3	↓
As Expected	72.5	74.1	↑

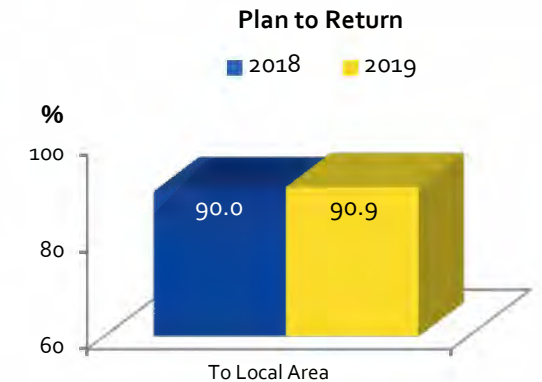


Satisfaction with Collier County

	June 2018	June 2019	
Very Satisfied	82.4%	83.0%	↑
Satisfied	12.1	12.4	↑
Satisfaction Level (Combined)	94.5%	95.4%	↑

Recommend Collier to Friends/Relatives

	June 2018	June 2019	
% Yes	92.2%	93.6%	↑



Plan to Return (% Yes)

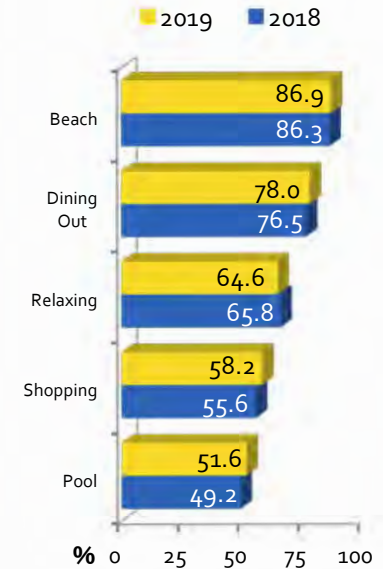
	June 2018	June 2019	
To Local Area	90.0%	90.9%	↑

Naples, Marco Island, Everglades Visitor Profile | June 2019

Activities Enjoyed in Area (Multiple Response)

	June 2018	June 2019	
Beach	86.3%	86.9%	↑
Dining Out	76.5	78.0	↑
Relaxing	65.8	64.6	↓
Shopping	55.6	58.2	↑
Pool	49.2	51.6	↑
Sunsets	42.1	45.4	↑
Sightseeing	35.2	36.9	↑
Sunning	30.8	32.7	↑
Enjoying Nature/Bird Watching/Everglades	28.1	31.7	↑
Swimming	26.3	24.9	↓
Reading	23.5	23.9	↑
Bars/Nightlife	19.7	20.4	↑
Walking	20.9	17.1	↓
Boating	14.7	15.3	↑
Art Galleries/Shows/Fairs	15.7	13.6	↓
Visiting with Friends/Relatives	8.1	6.8	↓
Golfing	6.7	6.5	↓

Activities Enjoyed in Area (Top Five)



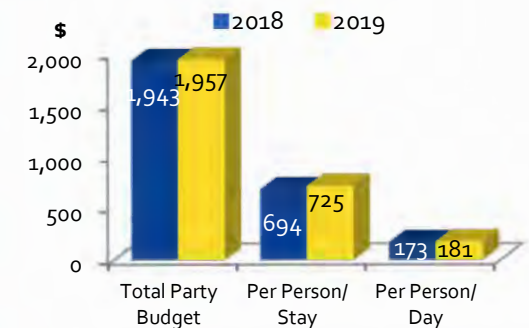
Demographics

	June 2018	June 2019	
Average Age Head of Household (Years)	47.5	47.9	↑
Median Annual Household Income	\$143,049	\$144,837	↑

Collier Base Budget

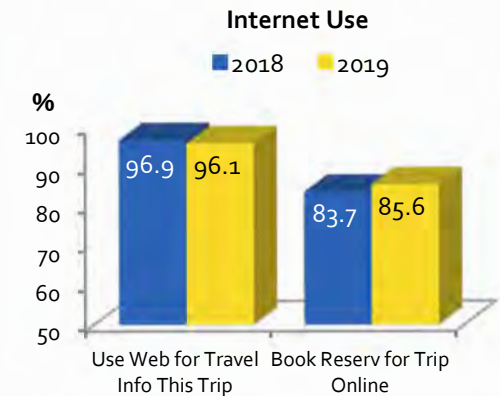
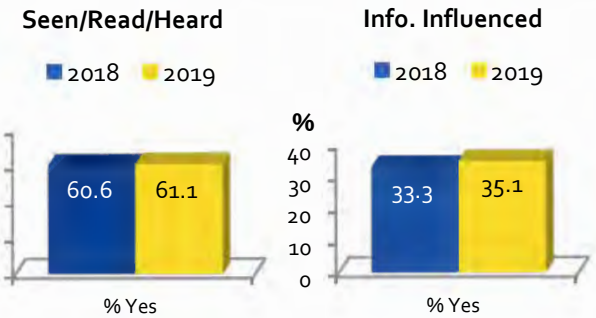
	June 2018	June 2019	
Total	\$1,942.65	\$1,956.64	↑
Per Person/Stay	693.80	724.68	↑
Per Person/Day	173.45	181.17	↑

Collier Base Budgets



Naples, Marco Island, Everglades Visitor Profile | June 2019

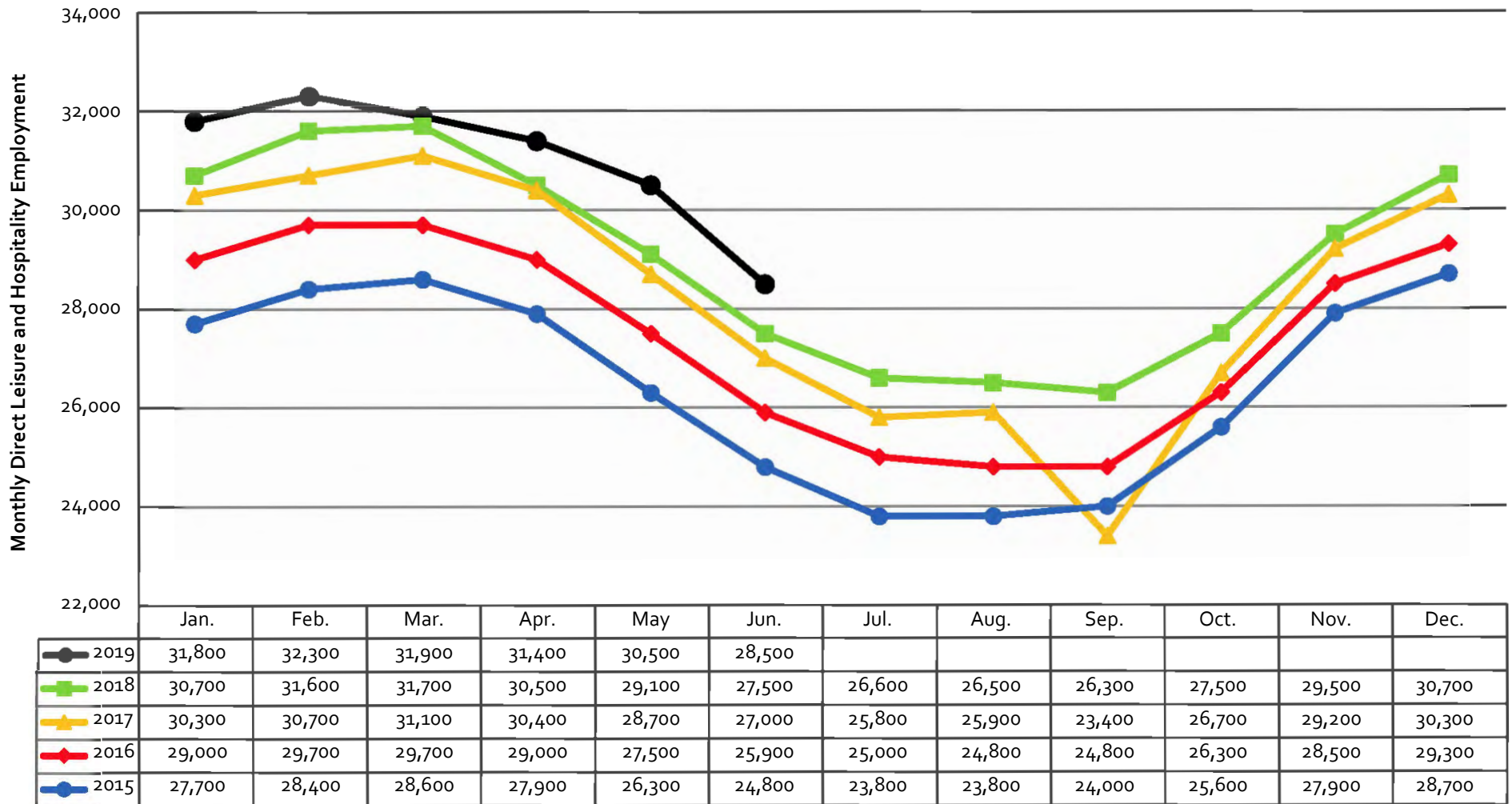
Area Information Seen/Read/Heard	June 2018	June 2019	
% Yes	60.6%	61.1%	↑
Directly Influenced by Information (Base: Seen/Read/Heard Area Information)			
	June 2018	June 2019	
% Yes	33.3%	35.1%	↑
Why Chose the Area (Multiple Response)			
	June 2018	June 2019	
Beach Area	62.0%	64.1%	↑
Previous Experience	42.5	44.0	↑
Quiet/Peaceful/Laid Back	39.9	40.8	↑
Relaxing	40.4	37.3	↓
Quality of Accommodations	36.0	36.6	↑
Weather	38.2	36.0	↓
Not Crowded	33.7	35.2	↑
Restaurants	31.6	34.1	↑
Appealing Brochures/Websites	29.0	29.8	↑
Outdoor Recreation/Nature	22.6	26.5	↑
Business/Meeting/Conference	20.7	24.1	↑
Recommendation	19.5	16.8	↓
Never Been	18.0	15.0	↓
Internet Use			
	June 2018	June 2019	
Use Internet to Obtain Travel Info for This Trip (% Yes)	96.9%	96.1%	↓
Book Reservations for Trip Online (%Yes)	83.7	85.6	↑



Industry Data:
2015 - 2019

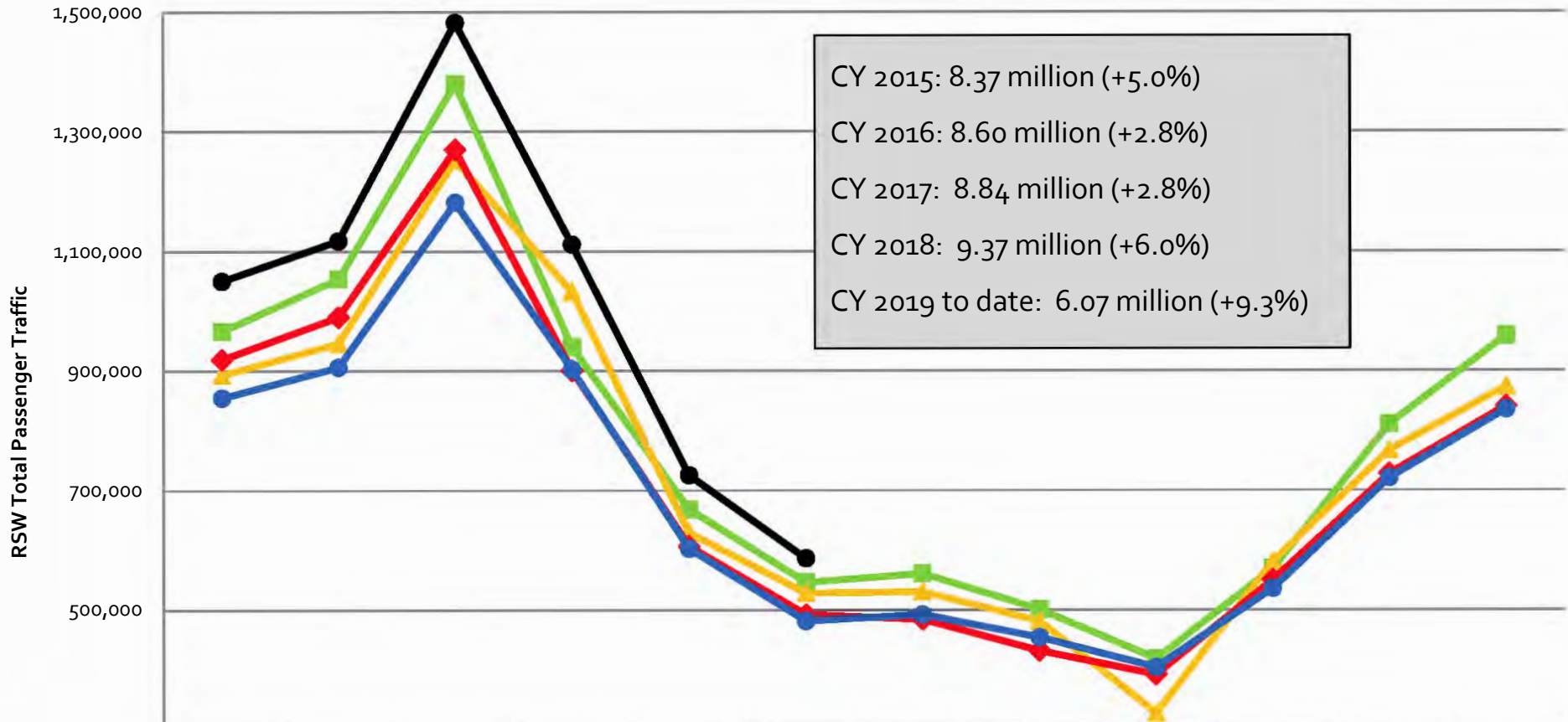


Collier Direct Leisure and Hospitality Employment (Calendar Year) *



* 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