

# 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 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](http://www.ResearchDataLLC.com)**

December 2018

## Naples, Marco Island, Everglades: November 2018 Summary

### Executive Summary: November 2018

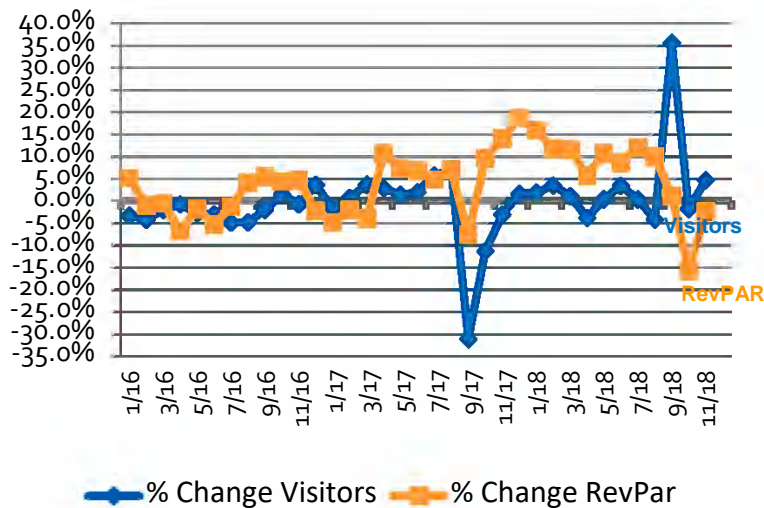
1. This November, some **145,900** visitors stayed in Collier's commercial lodgings **(+4.7%)\***. Their visits contributed an estimated **\$152,038,800** of economic impact to the County **(+6.6%)**. Key performance metrics are as follows:

<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%

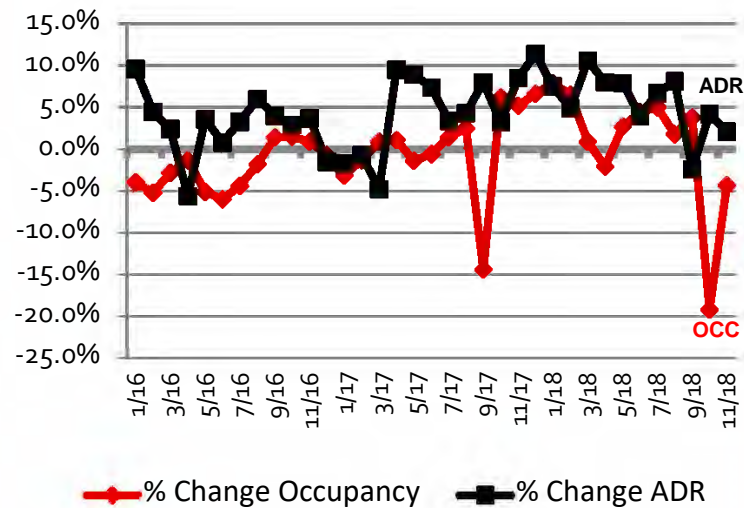
\* As of November 2018, approximately 109 Collier lodging units remained closed for renovations. Hurricane Irma made landfall on September 10, 2017.

\*\* Based on units available to be rented.

Key Collier Visitation Metrics (%Δ)



Key Collier Visitation Metrics (%Δ)



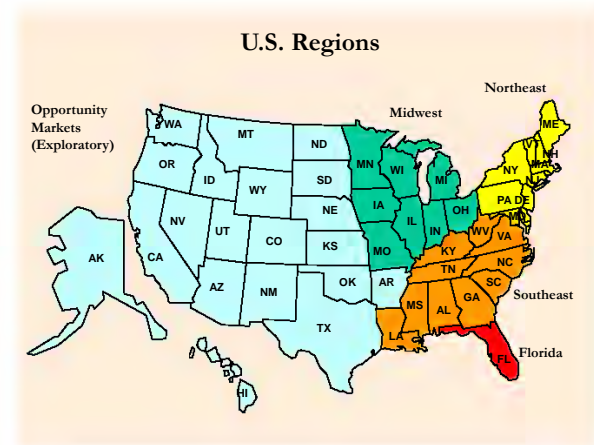
## Naples, Marco Island, Everglades: November 2018 Summary

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
<b>Total</b>	<b>145,900</b>	<b>+4.7</b>



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*



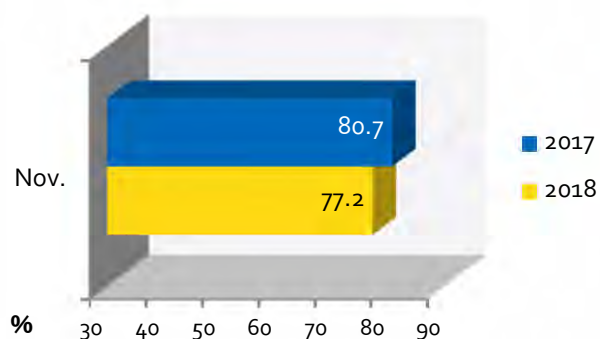
# Naples, Marco Island, Everglades Visitor Profile

November 2018

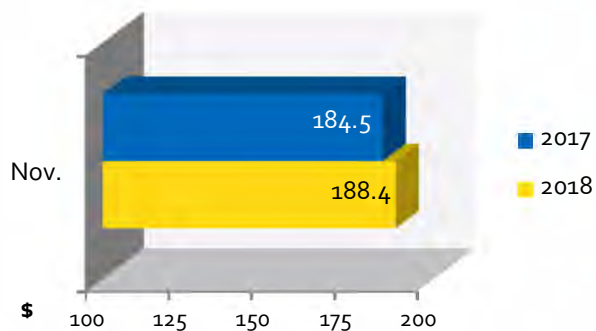
H/M/C+ Visitor Statistics	Year to Date (January – November)			November		
	2017	2018	% Δ '17/'18	2017	2018*	% Δ '17/'18
Visitors (#)	1,617,000	1,652,600	+2.2	139,400	145,900	+4.7
Room Nights	2,165,000	2,176,900	+0.5	174,300	183,600	+5.3
Direct Exp. (\$)	\$1,240,185,700	\$1,288,716,900	+3.9	\$95,664,600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

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

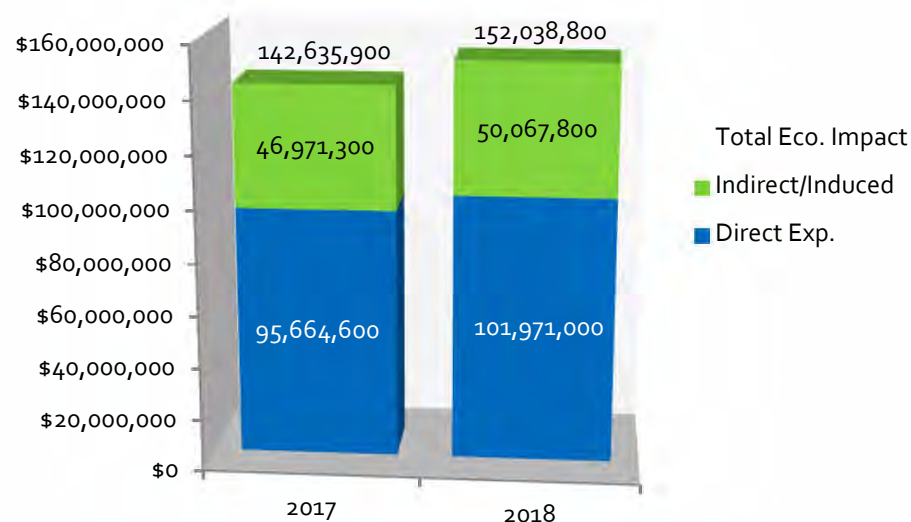
November Occupancy



November Room Rates



November Economic Impact



November

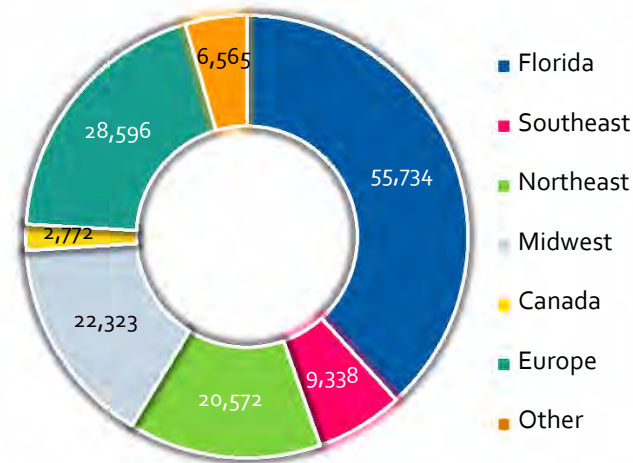
Lodging Statistics	2017	2018**	% Δ '17/'18
Occupancy	80.7%	77.2%	-4.3
Room Rates	\$184.5	\$188.4	+2.1
RevPAR	\$148.9	\$145.4	-2.4

\*\* 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
<b>Total</b>	<b>100.0</b>	<b>139,400</b>	<b>100.0</b>	<b>145,900</b>	<b>+4.7</b>

## 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	↑

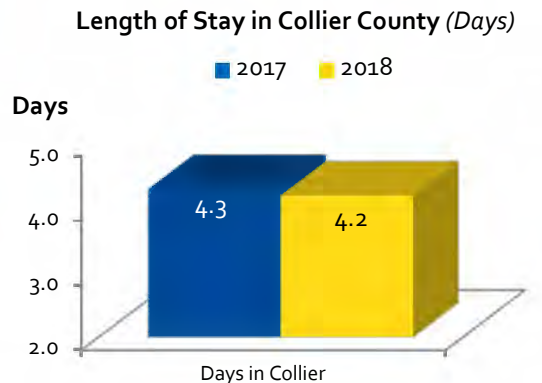
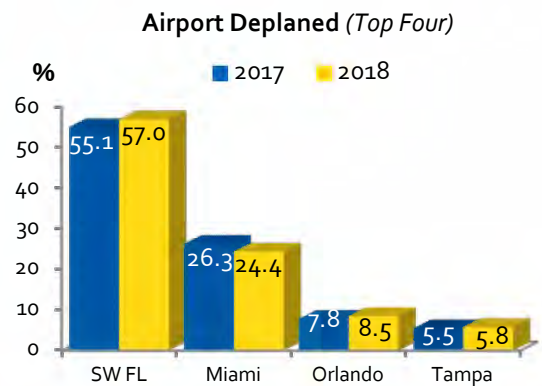
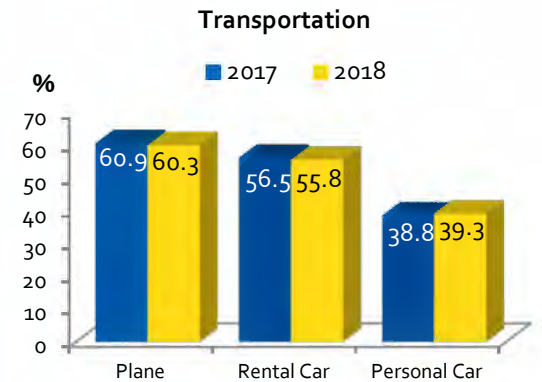
Airport Deplanned (Base: Flew)	November 2017	November 2018	
Southwest Florida International	55.1%	57.0%	↑
Miami International	26.3	24.4	↓
Orlando International/Sanford	7.8	8.5	↑
Tampa International	5.5	5.8	↑
Ft. Lauderdale International	5.1	3.8	↓

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	↓

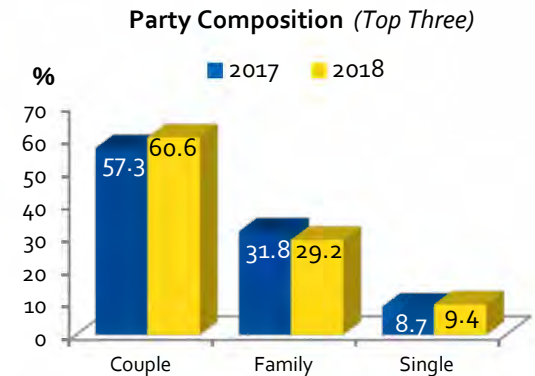




# Naples, Marco Island, Everglades Visitor Profile | November 2018

## 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	↓

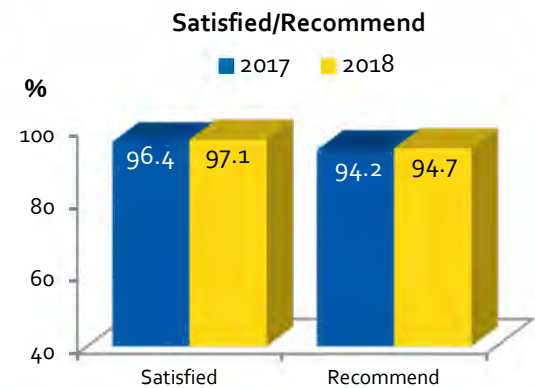


## Did Party Have Lodging Reservations for Stay

	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

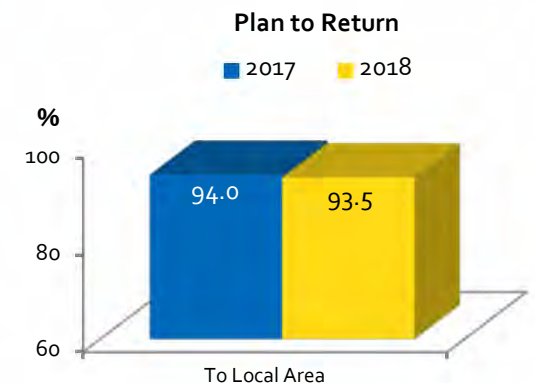
	November 2017	November 2018	
Very Satisfied	89.9%	91.3%	↑
Satisfied	6.5	5.8	↓
<b>Satisfaction Level (Combined)</b>	<b>96.4%</b>	<b>97.1%</b>	<b>↑</b>

## 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%	↓

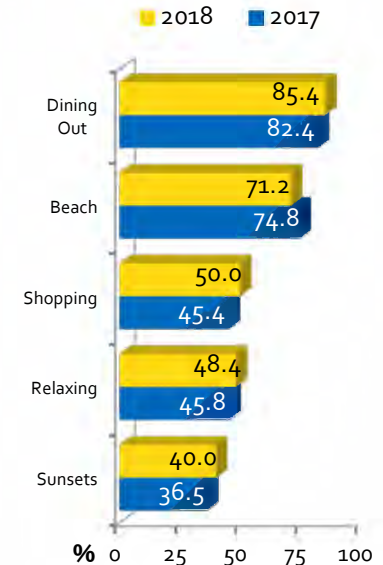


# Naples, Marco Island, Everglades Visitor Profile

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	↓

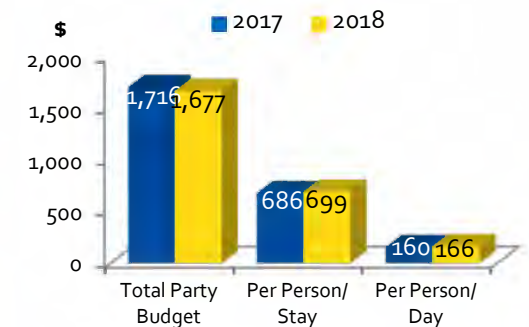
Activities Enjoyed in Area (Top Five)



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



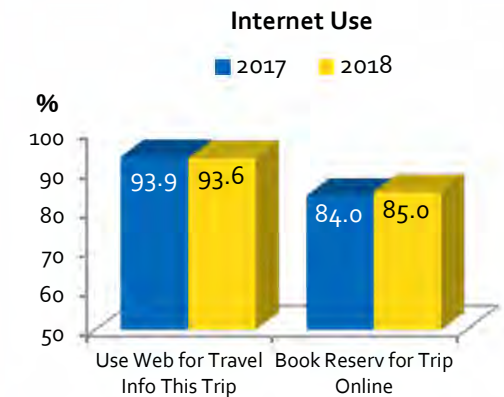
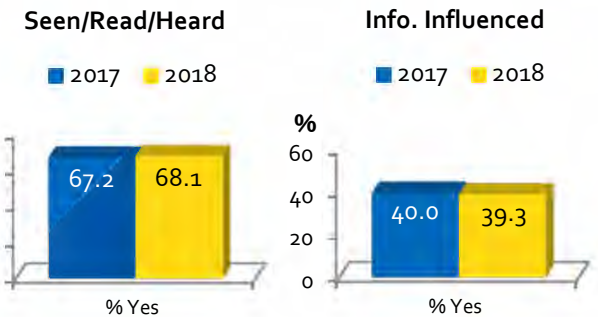
# Naples, Marco Island, Everglades Visitor Profile | November 2018

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	↓

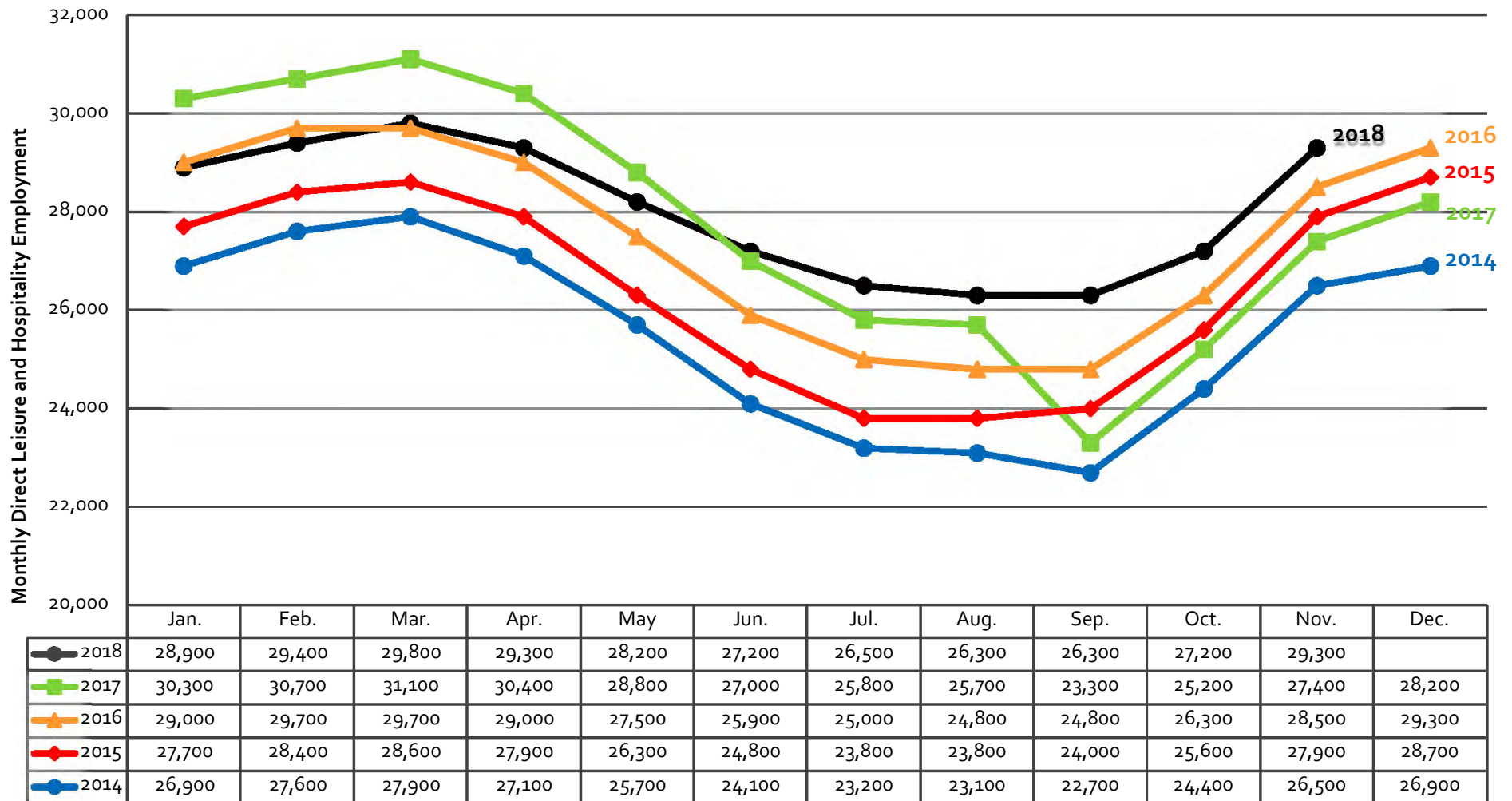
Internet Use	November 2017	November 2018	
Use Internet to Obtain Travel Info for This Trip (% Yes)	93.9%	93.6%	↓
Book Reservations for Trip Online (%Yes)	84.0	85.0	↑



## 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

