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Naples, Marco Island, Everglades Convention and Visitors Bureau November 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

December 2019

Naples, Marco Island, Everglades: November 2019 Summary

Executive Summary: November 2019

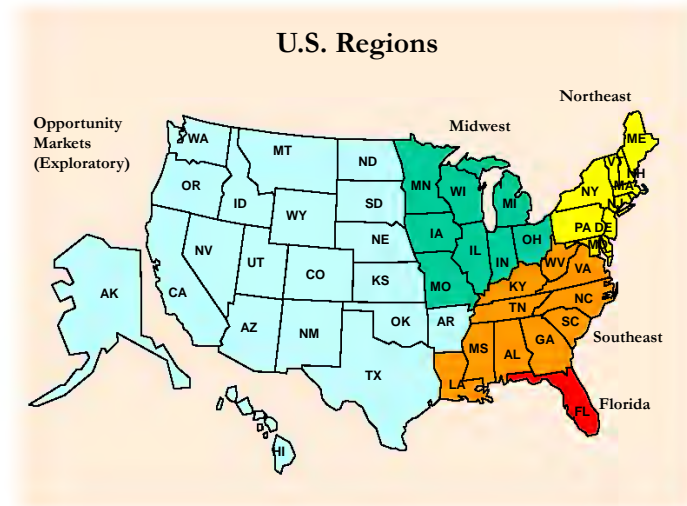
- This November, some **154,500** visitors stayed in Collier's commercial lodgings (**+5.9%**)*. Their visits contributed an estimated **\$157,787,000** of economic impact to the County (**+3.8%**). Key performance metrics are as follows:

<u>November</u>	<u>2018*</u>	<u>2019</u>	<u>% Δ</u>
Occupancy	77.2%	76.8%	-0.5%
ADR	\$188.4	\$186.0	-1.3%
RevPAR	\$145.4	\$142.8	-1.8%

* Available records suggest that approximately 15 Collier lodging units remained closed in November 2019. (November 2018: 109 units)

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

<u>November Visitation</u>	<u>2019</u> <u>Visitor #</u>	<u>Δ</u>
Florida	57,474	+3.1
Southeast	10,660	+14.2
Northeast	21,167	+2.9
Midwest	24,566	+10.0
Canada	4,326	+56.1
Europe	28,428	-0.6
Other	7,879	+20.0
Total	154,500	+5.9



Naples, Marco Island, Everglades: November 2019 Summary

3. Compared to last November, **51.9%** of Collier lodging managers report their three month forward reservations levels as “up.”

% of Properties (November)		
<u>Reporting Reservations:</u>	<u>2018</u>	<u>2019</u>
Up	48.3%	51.9%
Same	31.0	33.3
Down	20.7	14.8

4. This November, over half of the destination’s visitor parties flew (2018: 60.3%; 2019: 62.4%). A majority of these (57.8%) deplaned at RSW, with Miami capturing some 20.8% of deplanements.
5. This November, visitor party size averaged 2.4 travelers who stayed for 3.0 nights in the Naples, Marco Island, Everglades area (2018: 2.4 people; 3.2 nights).
6. Some 39.3% of Collier’s November visitors are in the destination for the first time.
7. Fully 93.8% consult the web for trip information, with some 87.2% making bookings for their trip online.
8. The majority (96.8%) are satisfied with their Collier stay, with 93.7% planning a future trip to the area.
9. The typical November visitor is 47.8 years of age.

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

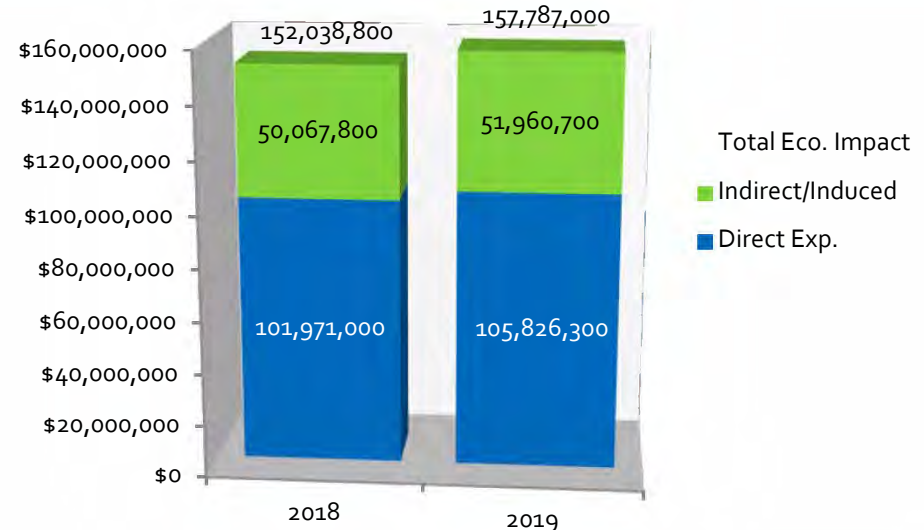
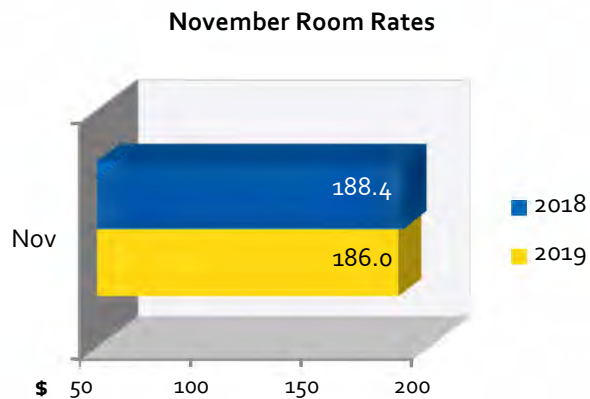
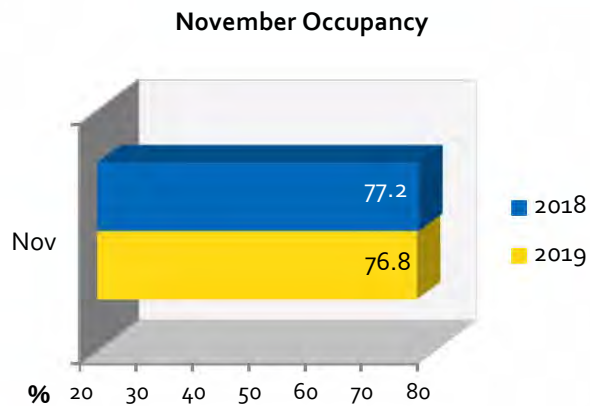


Naples, Marco Island, Everglades Visitor Profile | November 2019

H/M/C+ Visitor Statistics	Year to Date (January – November)			November		
	2018	2019	% Δ '18/'19	2018	2019**	% Δ '18/'19
Visitors (#)	1,652,600	1,747,600	+5.7	145,900	154,500	+5.9
Room Nights	2,176,900	2,311,900	+6.2	183,600	191,700	+4.4
Direct Exp. (\$)	\$1,288,716,900	\$1,388,802,000	+7.8	\$101,971,000	\$105,826,300	+3.8
Total Eco. Impact (\$)	\$1,921,477,000	\$2,070,703,700	+7.8	\$152,038,800	\$157,787,000	+3.8

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

November Economic Impact



November

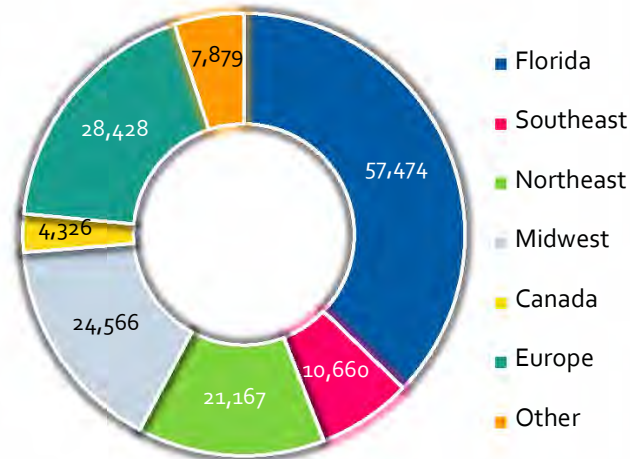
Lodging Statistics	2018	2019**	% Δ '18/'19
Occupancy	77.2%	76.8%	-0.5
Room Rates	\$188.4	\$186.0	-1.3
RevPAR	\$145.4	\$142.8	-1.8

** Note: Available records suggest that approximately 15 Collier lodging units remained closed in November 2019. (November 2018: 109 units).

November 2019 Visitor Origin Markets

Visitor Origins	2018		2019		% Δ '18/'19
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	38.2%	55,734	37.2%	57,474	+3.1
Southeast	6.4	9,338	6.9	10,660	+14.2
Northeast	14.1	20,572	13.7	21,167	+2.9
Midwest	15.3	22,323	15.9	24,566	+10.0
Canada	1.9	2,772	2.8	4,326	+56.1
Europe	19.6	28,596	18.4	28,428	-0.6
Other	4.5	6,565	5.1	7,879	+20.0
Total	100.0	145,900	100.0	154,500	+5.9

November 2019 Visitor Origins



Naples, Marco Island, Everglades Visitor Profile | November 2019

Transportation Mode (Multiple Response)	November 2018	November 2019	
Plane	60.3%	62.4%	↑
Rental Car	55.8	56.3	↑
Personal Car	39.3	36.7	↓

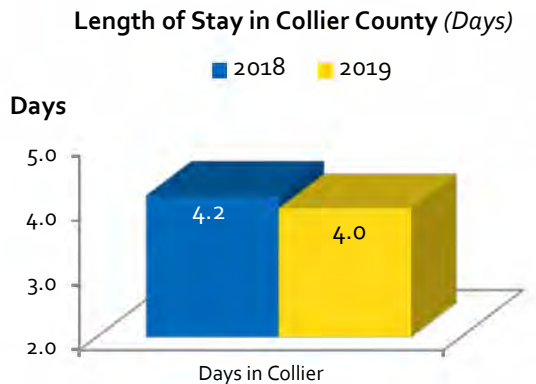
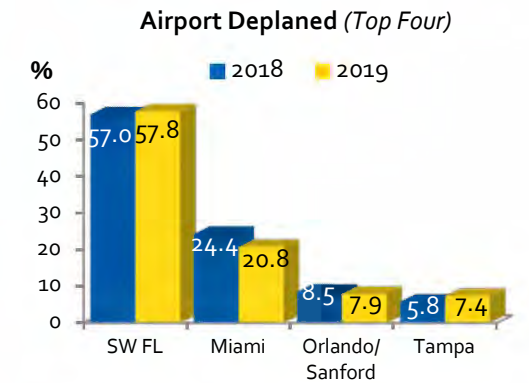
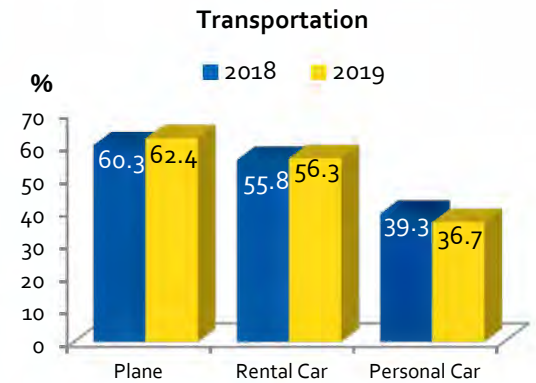
Airport Deplened (Base: Flew)	November 2018	November 2019	
Southwest Florida International	57.0%	57.8%	↑
Miami International	24.4	20.8	↓
Orlando International/Sanford	8.5	7.9	↓
Tampa International	5.8	7.4	↑
Ft. Lauderdale International	3.8	4.8	↑

Purpose of Trip (Multiple Response)	November 2018	November 2019	
Vacation/Weekend Getaway	67.2%	68.3%	↑
Group Travel	32.3	31.0	↓
Visit with Friends and Relatives	13.2	14.1	↑
Special Event	7.8	9.8	↑

First Visit to (% yes)	November 2018	November 2019	
Collier County	40.3%	39.3%	↓
Florida	4.0	3.6	↓

Length of Stay (Days)	November 2018	November 2019	
In Collier County	4.2	4.0	↓

Party Size	November 2018	November 2019	
Number of People	2.4	2.4	--



Naples, Marco Island, Everglades Visitor Profile | November 2019

Party Composition <i>(Multiple Response)</i>	November 2018	November 2019	
Couple	60.6%	62.2%	↑
Family	29.2	28.2	↓
Single	9.4	8.9	↓
Business Associates	4.4	4.0	↓
Group of Couples	3.2	3.5	↑
Group of Friends	3.0	2.8	↓

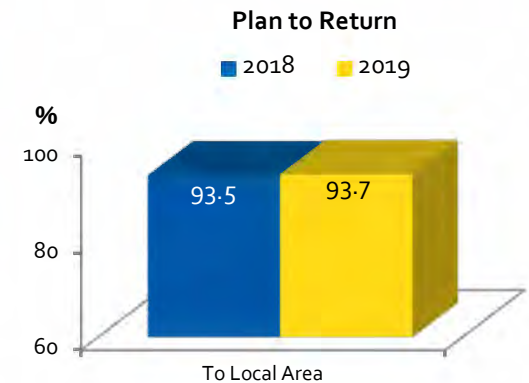
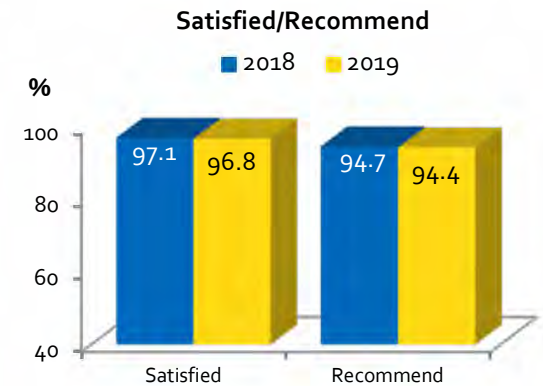
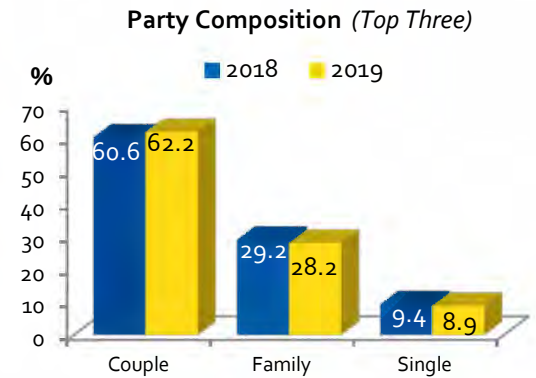
Did Party Have Lodging Reservations for Stay	November 2018	November 2019	
% Yes	95.7%	96.6%	↑

Expense Relative to Expectations	November 2018	November 2019	
More Expensive	24.2%	22.7%	↓
Less Expensive	7.1	5.3	↓
As Expected	55.5	65.5	↑

Satisfaction with Collier County	November 2018	November 2019	
Very Satisfied	91.3%	93.3%	↑
Satisfied	5.8	3.5	↓
Satisfaction Level (Combined)	97.1%	96.8%	↓

Recommend Collier to Friends/Relatives	November 2018	November 2019	
% Yes	94.7%	94.4%	↓

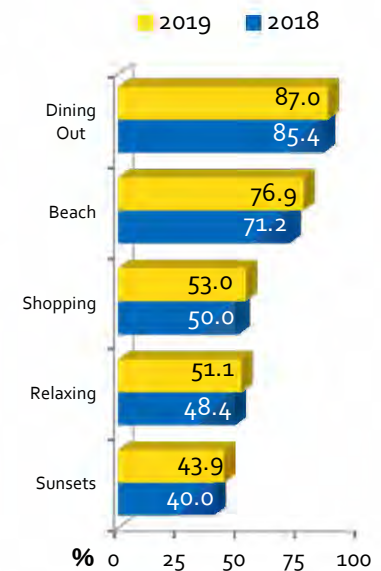
Plan to Return (% Yes)	November 2018	November 2019	
To Local Area	93.5%	93.7%	↑



Naples, Marco Island, Everglades Visitor Profile | November 2019

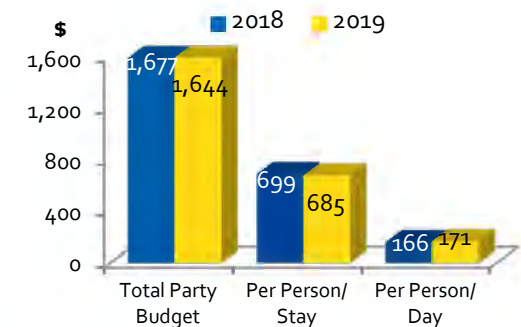
Activities Enjoyed in Area (Multiple Response)	November 2018	November 2019	
Dining Out	85.4%	87.0%	↑
Beach	71.2	76.9	↑
Shopping	50.0	53.0	↑
Relaxing	48.4	51.1	↑
Sunsets	40.0	43.9	↑
Sunning	31.7	33.3	↑
Enjoying Nature/Bird Watching/Everglades	24.9	30.0	↑
Pool	25.8	25.1	↓
Sightseeing	23.7	23.0	↓
Swimming	19.6	18.7	↓
Walking	16.0	17.8	↑
Bars/Nightlife	18.3	16.5	↓
Visiting with Friends/Relatives	15.7	16.5	↑
Art Galleries/Shows/Fairs	16.9	16.3	↓
Reading	18.8	16.0	↓
Shelling	13.8	15.0	↑
Boating	11.2	13.1	↑
Golfing	9.2	9.6	↑

Activities Enjoyed in Area (Top Five)



Demographics	November 2018	November 2019	
Average Age Head of Household (Years)	48.2	47.8	↓
Median Annual Household Income	\$171,623	\$174,026	↑

Collier Base Budgets

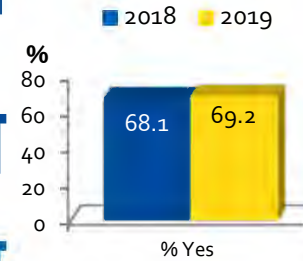


Collier Base Budget	November 2018	November 2019	
Total	\$1,677.38	\$1,643.90	↓
Per Person/Stay	698.91	684.96	↓
Per Person/Day	166.41	171.24	↑

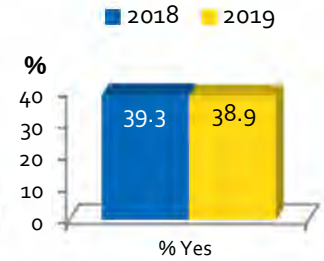
Naples, Marco Island, Everglades Visitor Profile | November 2019

Area Information Seen/Read/Heard	November 2018	November 2019	
% Yes	68.1%	69.2%	↑
Directly Influenced by Information (Base: Seen/Read/Heard Area Information)			
	November 2018	November 2019	
% Yes	39.3%	38.9%	↓
Why Chose the Area (Multiple Response)			
	November 2018	November 2019	
Beach Area	58.0%	59.2%	↑
Quiet/Peaceful/Laid Back	55.1	56.9	↑
Weather	47.3	47.7	↑
Relaxing	43.4	44.3	↑
Previous Experience	38.6	40.4	↑
Quality of Accommodations	37.7	39.2	↑
Appealing Brochures/Websites	34.7	37.1	↑
Not Crowded	38.0	34.1	↓
Business/Meeting/Conference	35.6	32.7	↓
Restaurants	31.4	31.7	↑
Outdoor Recreation/Nature	25.3	29.4	↑
Shopping	24.8	25.9	↑
Recommendation	20.1	19.3	↓
Never Been	17.3	15.8	↓
Internet Use			
	November 2018	November 2019	
Use Internet to Obtain Travel Info for This Trip (% Yes)	93.6%	93.8%	↑
Book Reservations for Trip Online (%Yes)	85.0	87.2	↑

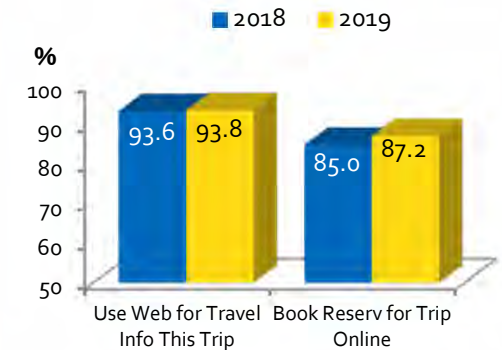
Seen/Read/Heard



Info. Influenced



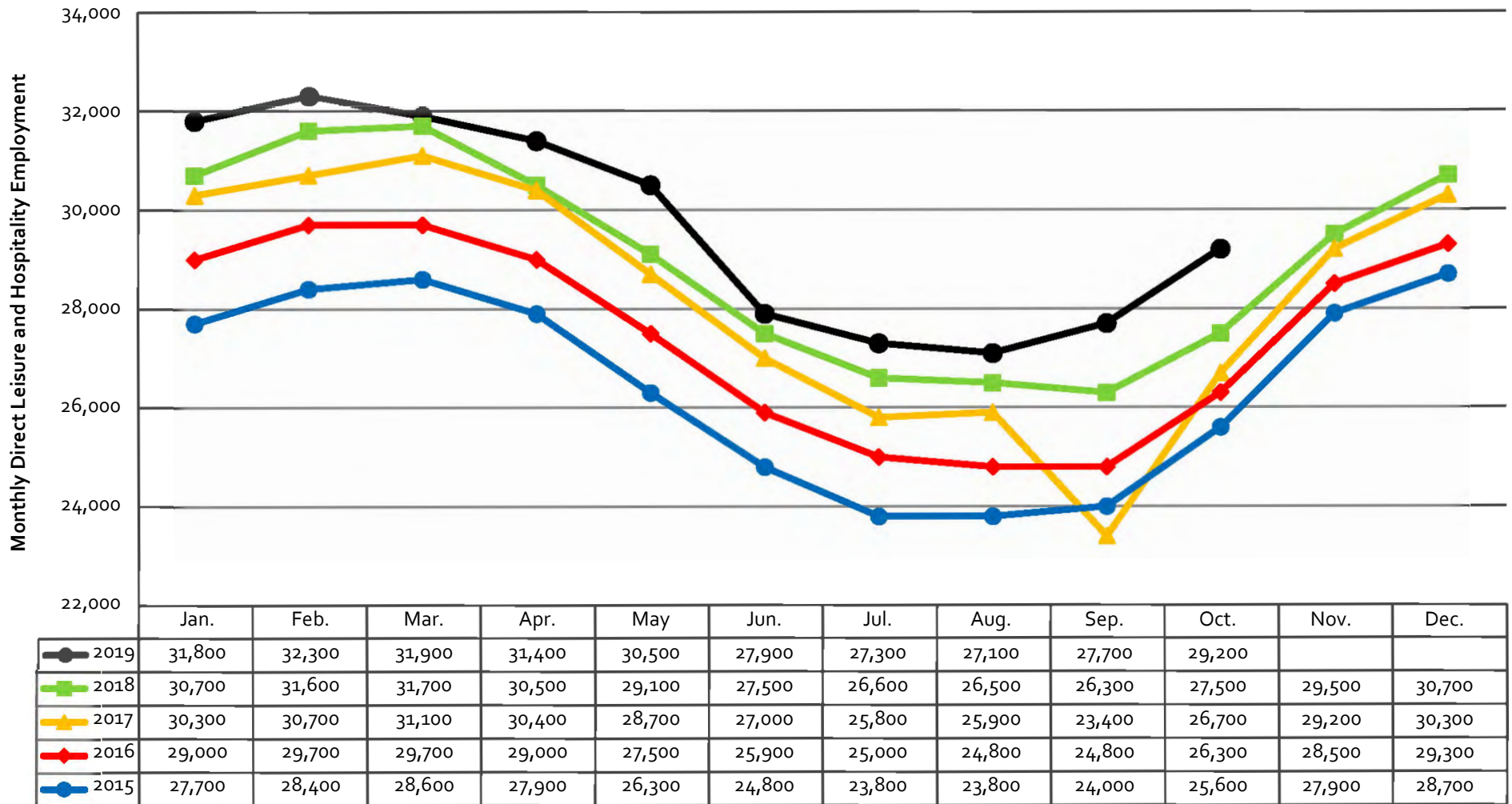
Internet Use



Industry Data: *2015 - 2019*

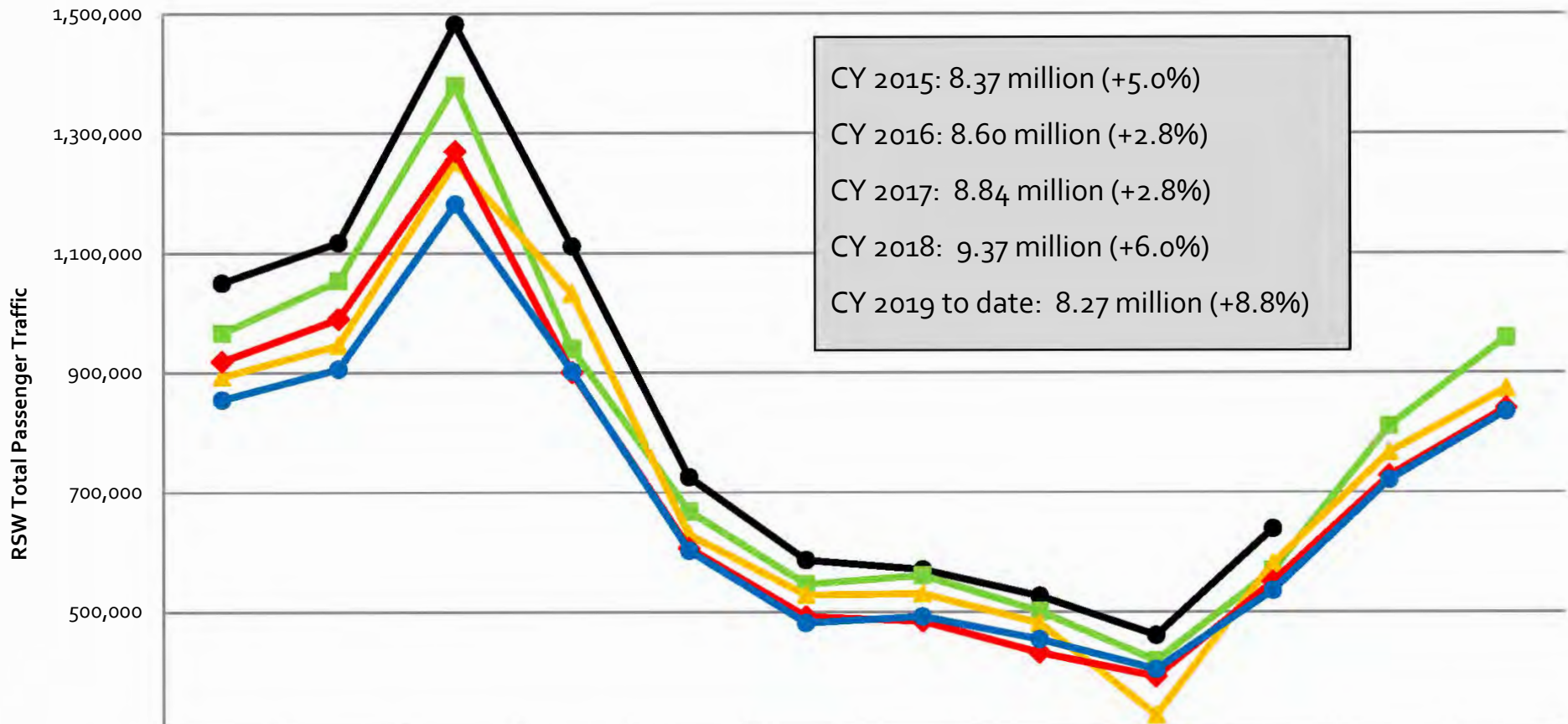


Collier Direct Leisure and Hospitality Employment (Calendar Year) *



* 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	638,922		
■ 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