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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

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:

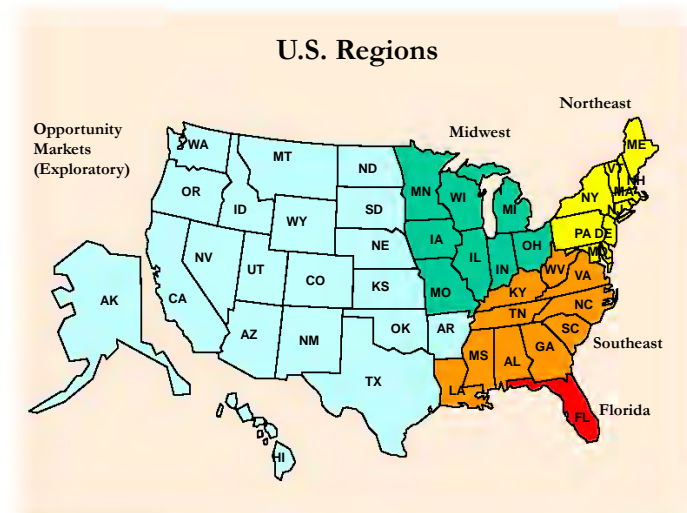
| <u>October</u> | <u>2018**</u> | <u>2019</u> | <u>% Δ</u> |
|----------------|---------------|-------------|------------|
| Occupancy | 64.1% | 67.5% | +5.3% |
| ADR | \$169.4 | \$176.7 | +4.3% |
| RevPAR | \$108.6 | \$119.3 | +9.9% |

* 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>Visitor #</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 |
| Total | 154,000 | +12.7 |



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.”

| % of Properties (October) | | |
|---------------------------------------|--------------------|--------------------|
| <u>Reporting Reservations:</u> | <u>2018</u> | <u>2019</u> |
| 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:

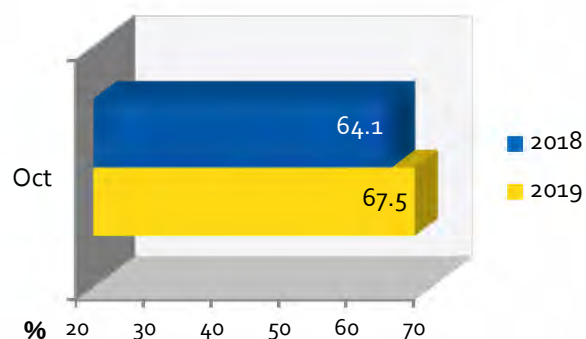
October 2019 Visitor Profile



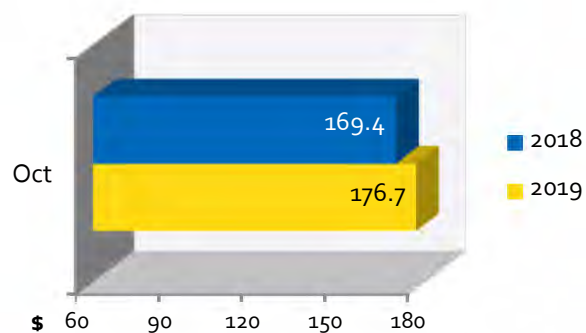
| H/M/C+ Visitor Statistics | Year to Date (January – October) | | | October | | |
|-------------------------------|----------------------------------|------------------------|-------------|----------------------|----------------------|--------------|
| | 2018 | 2019 | % Δ '18/'19 | 2018 | 2019** | % 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 |
| Total Eco. Impact (\$) | \$1,769,438,200 | \$1,912,916,700 | +8.1 | \$122,970,200 | \$143,132,100 | +16.4 |

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

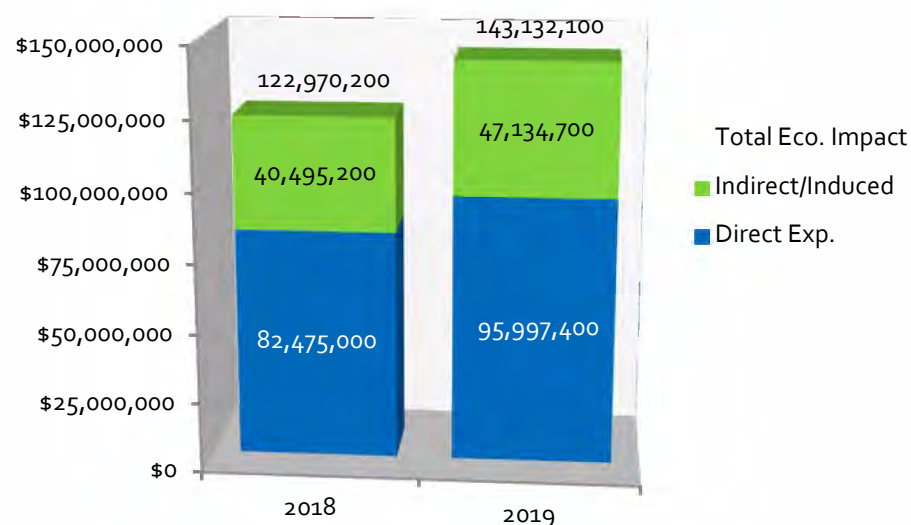
October Occupancy



October Room Rates



October Economic Impact



October

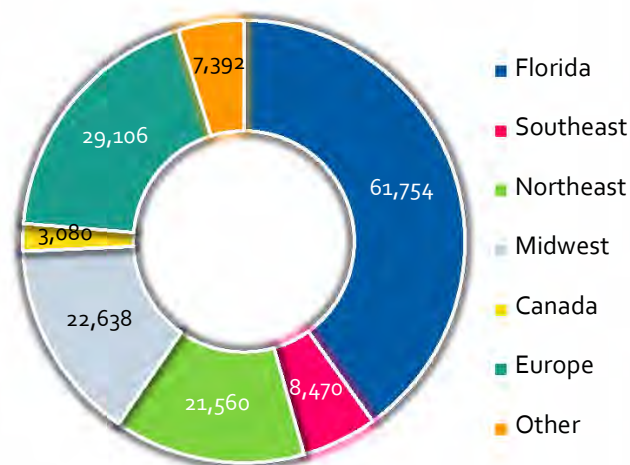
| Lodging Statistics | 2018 | 2019** | % Δ '18/'19 |
|--------------------|---------|---------|-------------|
| Occupancy | 64.1% | 67.5% | +5.3 |
| Room Rates | \$169.4 | \$176.7 | +4.3 |
| RevPAR | \$108.6 | \$119.3 | +9.9 |

** 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 |
| Total | 100.0 | 136,600 | 100.0 | 154,000 | +12.7 |

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 Deplaned (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 | ↓ |

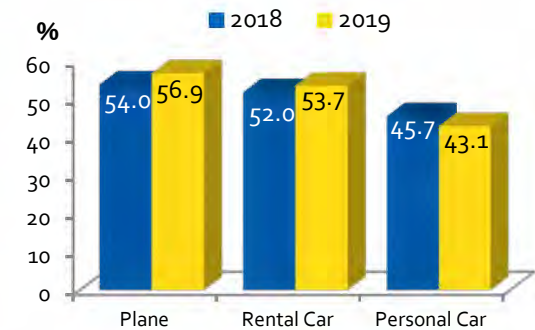
Length of Stay (Days)

| | October 2018 | October 2019 | |
|-------------------|--------------|--------------|---|
| In Collier County | 4.3 | 4.2 | ↓ |

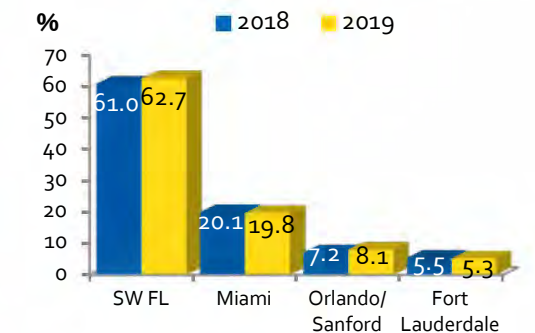
Party Size

| | October 2018 | October 2019 | |
|------------------|--------------|--------------|---|
| Number of People | 2.5 | 2.4 | ↓ |

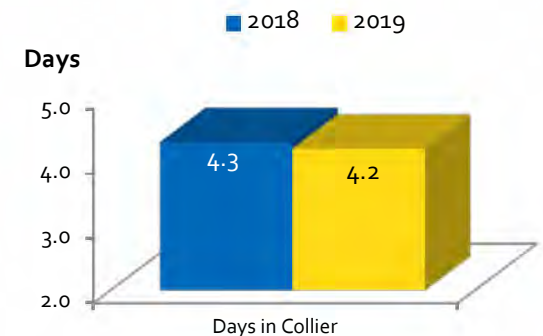
Transportation



Airport Deplaned (Top Four)



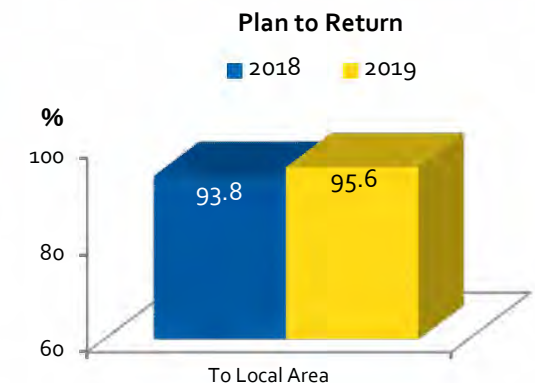
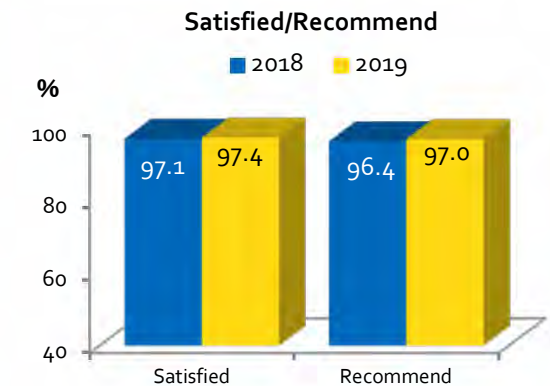
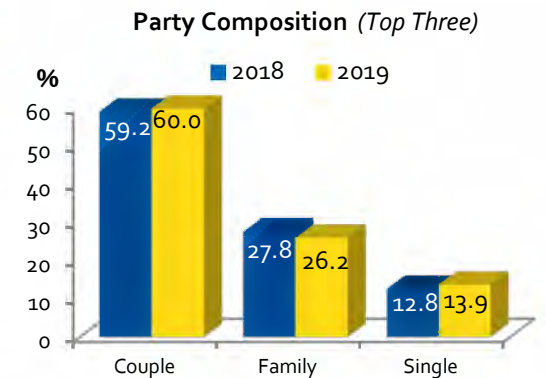
Length of Stay in Collier County (Days)



Naples, Marco Island, Everglades Visitor Profile

October 2019

| Party Composition (Multiple Response) | 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 | ↑ |
| Did Party Have Lodging Reservations for Stay | October 2018 | October 2019 | |
| % Yes | 95.9% | 97.3% | ↑ |
| Expense Relative to Expectations | October 2018 | October 2019 | |
| More Expensive | 13.6% | 16.0% | ↑ |
| Less Expensive | 4.1 | 3.4 | ↓ |
| As Expected | 76.1 | 73.3 | ↓ |
| Satisfaction with Collier County | October 2018 | October 2019 | |
| Very Satisfied | 88.0% | 90.9% | ↑ |
| Satisfied | 9.1 | 6.5 | ↓ |
| Satisfaction Level (Combined) | 97.1% | 97.4% | ↑ |
| Recommend Collier to Friends/Relatives | October 2018 | October 2019 | |
| % Yes | 96.4% | 97.0% | ↑ |
| Plan to Return (% Yes) | October 2018 | October 2019 | |
| To Local Area | 93.8% | 95.6% | ↑ |



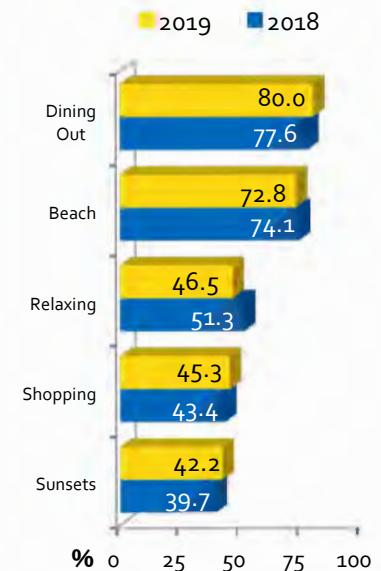
Naples, Marco Island, Everglades Visitor Profile

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)



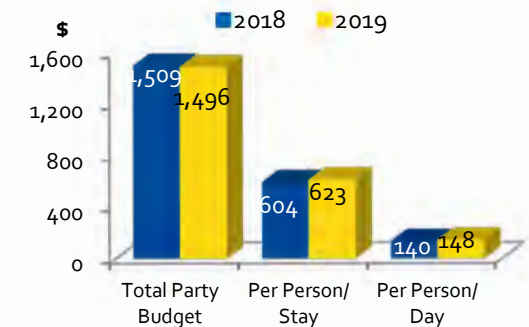
Demographics

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

Collier Base 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 |

Collier Base Budgets



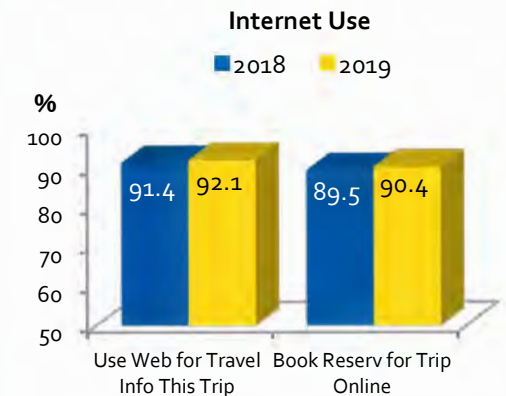
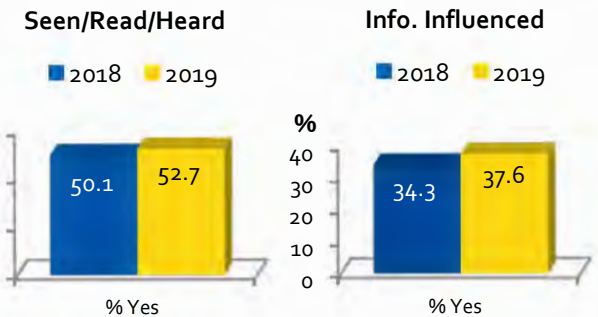
Naples, Marco Island, Everglades Visitor Profile | October 2019

| 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 ↑ |

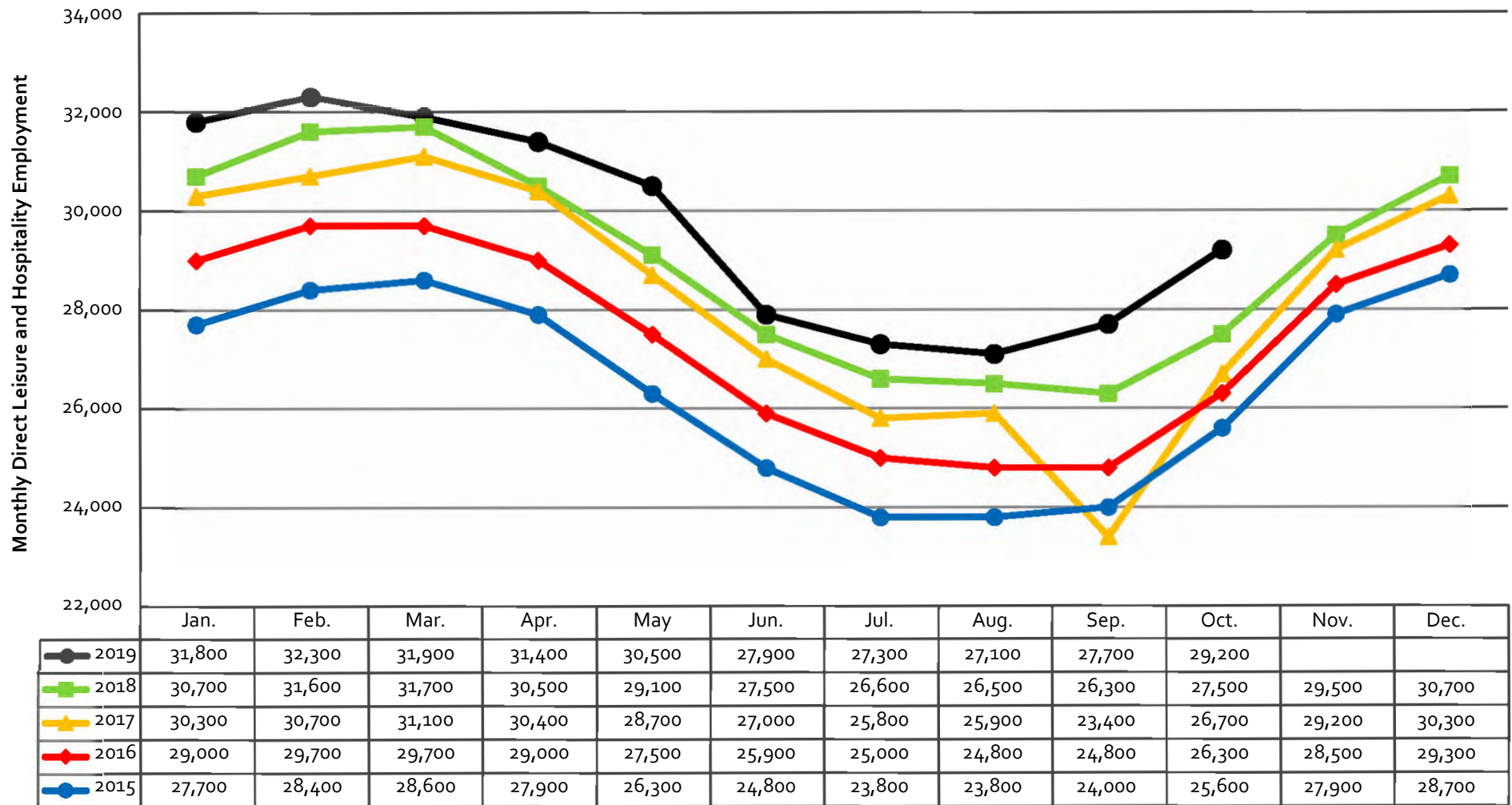
| Internet Use | October 2018 | October 2019 |
|----------------------------------------------------------|--------------|--------------|
| Use Internet to Obtain Travel Info for This Trip (% Yes) | 91.4% | 92.1% ↑ |
| Book Reservations for Trip Online (%Yes) | 89.5 | 90.4 ↑ |



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

