

RESEARCH DATA SERVICES, INC.

4520 WEST OAKELLAR AVENUE • #13169
TAMPA, FLORIDA 33611
TEL (813) 254-2975 • FAX (813) 223-2986



Naples, Marco Island, Everglades Convention and Visitors Bureau September 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

October 2019

Naples, Marco Island, Everglades: September 2019 Summary

Executive Summary: September 2019

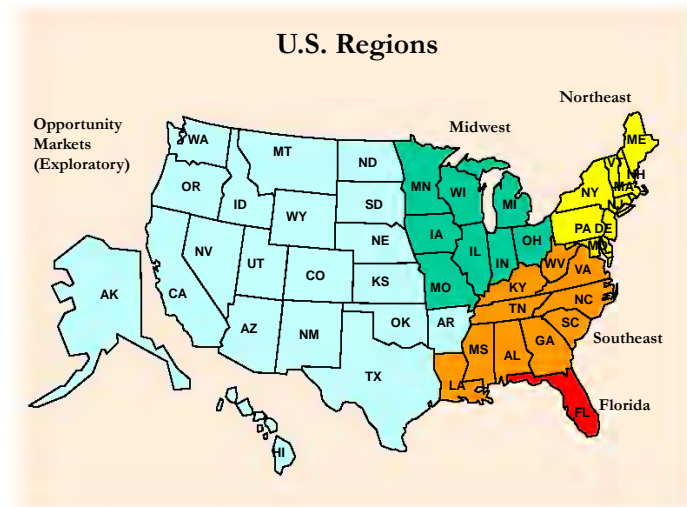
- 1.** This September, some **92,300** visitors stayed in Collier's commercial lodgings **(+7.2%)***. Their visits contributed an estimated **\$83,660,200** of economic impact to the County **(+12.9%)**. Key performance metrics are as follows:

<u>September</u>	<u>2018</u>	<u>2019</u>	<u>% Δ</u>
Occupancy	57.8%	58.3%	+0.9%
ADR	\$132.9	\$140.6	+5.8%
RevPAR	\$76.8	\$82.0	+6.8%

* Available records suggest that approximately 28 Collier lodging units remained closed in September 2019. (September 2018: 471 units)

- 2.** Collier's September visitation originates from the following primary market segments:

<u>September Visitation</u>	<u>2019 Visitor #</u>	<u>Δ</u>
Florida	40,150	+4.3
Southeast	6,092	+4.0
Northeast	11,722	+5.5
Midwest	8,307	+17.7
Canada	923	-23.4
Europe	19,383	+12.0
Other	5,723	+12.7
Total	92,300	+7.2



Naples, Marco Island, Everglades: September 2019 Summary

3. Compared to last September, **44.0%** of Collier lodging managers report their three month forward reservations levels as “up.”

% of Properties (September)		
<u>Reporting Reservations:</u>		
	<u>2018</u>	<u>2019</u>
Up	39.3%	44.0%
Same	20.3	40.0
Down	40.4	16.0

4. This September, almost half of the destination’s visitor parties flew (2018: 53.7%; 2019: 55.2%). A majority of these (**58.8%**) deplaned at RSW, with Miami capturing some **23.4%** of deplanements.
5. This September, visitor party size averaged **2.4** travelers who stayed for **3.5 nights** in the Naples, Marco Island, Everglades area (2018: 2.3 people; 3.4 nights).
6. Some **44.9%** of Collier’s September visitors are in the destination for the first time.
7. Fully **94.8%** consult the web for trip information, with some **83.5%** making bookings for their trip online.
8. The majority (**92.5%**) are satisfied with their Collier stay, with **88.7%** planning a future trip to the area.
9. The typical September visitor is **47.0 years of age**.

Naples, Marco Island, Everglades:

September 2019 Visitor Profile



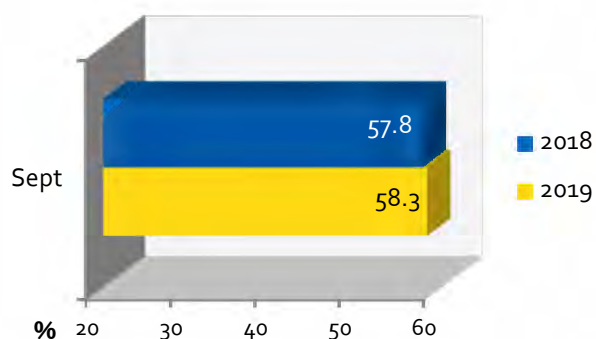
Naples, Marco Island, Everglades Visitor Profile

September 2019

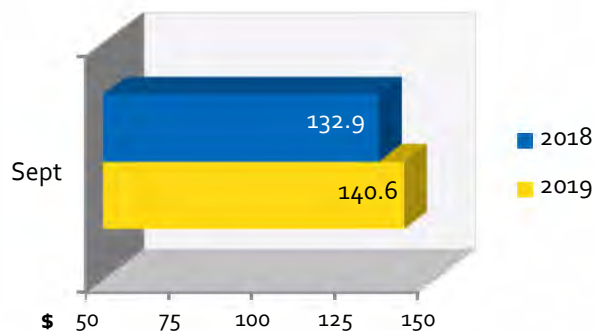
H/M/C+ Visitor Statistics	Year to Date (January – September)			September		
	2018	2019	% Δ '18/'19	2018	2019**	% Δ '18/'19
Visitors (#)	1,370,100	1,439,100	+5.0	86,100	92,300	+7.2
Room Nights	1,821,200	1,924,500	+5.7	161,100	173,200	+7.5
Direct Exp. (\$)	\$1,104,270,900	\$1,186,978,300	+7.5	\$49,688,300	\$56,110,100	+12.9
Total Eco. Impact (\$)	\$1,646,468,000	\$1,769,784,600	+7.5	\$74,085,300	\$83,660,200	+12.9

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

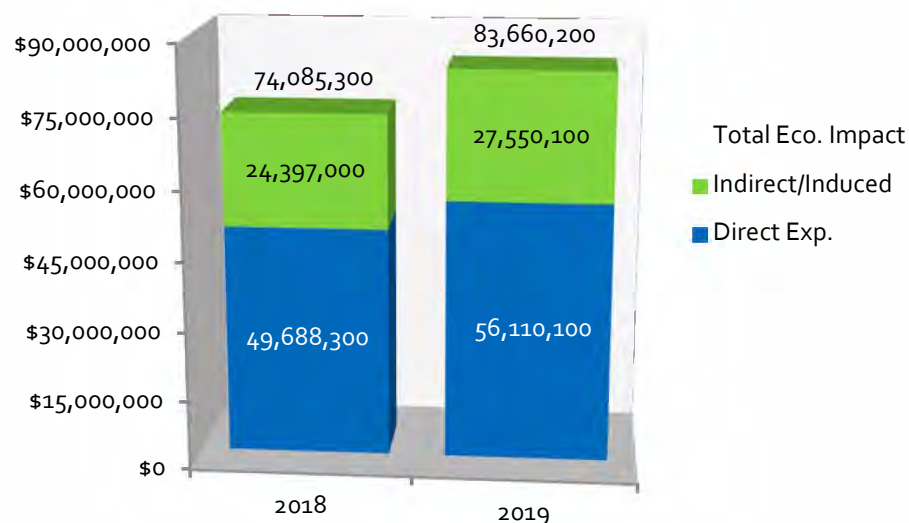
September Occupancy



September Room Rates



September Economic Impact



September

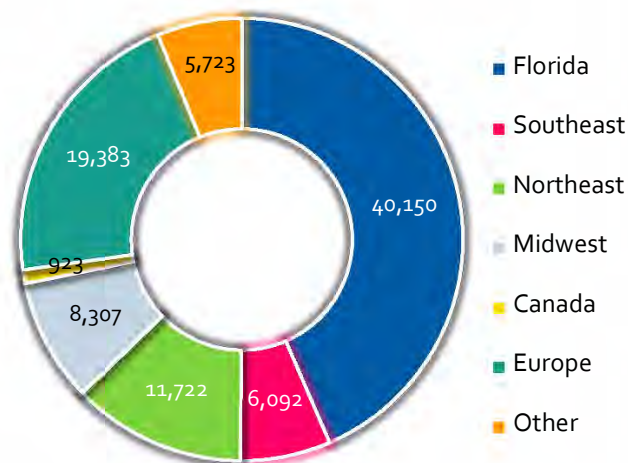
Lodging Statistics	2018	2019**	% Δ '18/'19
Occupancy	57.8%	58.3%	+0.9
Room Rates	\$132.9	\$140.6	+5.8
RevPAR	\$76.8	\$82.0	+6.8

** Note: Available records suggest that approximately 28 Collier lodging units remained closed in September 2019. (September 2018: 471 units).

September 2019 Visitor Origin Markets

Visitor Origins	2018		2019		% Δ '18/'19
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	44.7%	38,487	43.5%	40,150	+4.3
Southeast	6.8	5,855	6.6	6,092	+4.0
Northeast	12.9	11,107	12.7	11,722	+5.5
Midwest	8.2	7,060	9.0	8,307	+17.7
Canada	1.4	1,205	1.0	923	-23.4
Europe	20.1	17,306	21.0	19,383	+12.0
Other	5.9	5,080	6.2	5,723	+12.7
Total	100.0	86,100	100.0	92,300	+7.2

September 2019 Visitor Origins



Naples, Marco Island, Everglades Visitor Profile

September 2019

Transportation Mode (Multiple Response)	September 2018	September 2019	
Plane	53.7%	55.2%	↑
Rental Car	51.5	52.5	↑
Personal Car	46.3	44.3	↓

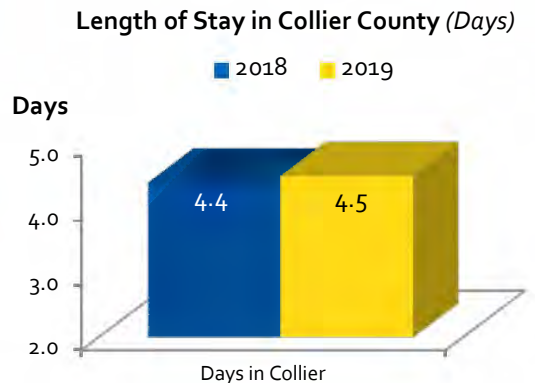
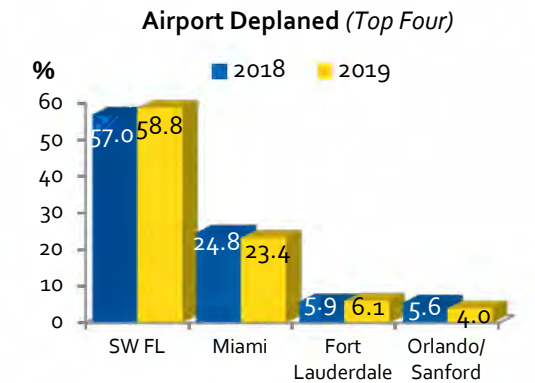
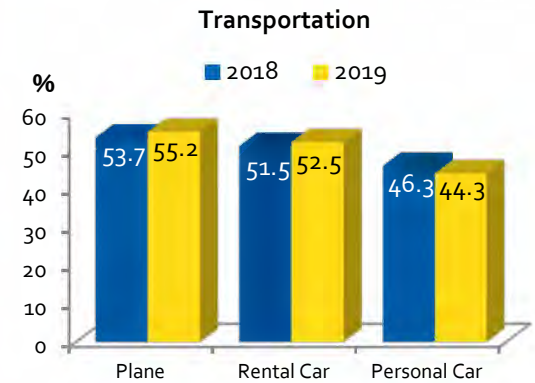
Airport Deplaned (Base: Flew)	September 2018	September 2019	
Southwest Florida International	57.0%	58.8%	↑
Miami International	24.8	23.4	↓
Ft. Lauderdale International	5.9	6.1	↑
Orlando International/Sanford	5.6	4.0	↓
Tampa International	2.4	3.6	↑

Purpose of Trip (Multiple Response)	September 2018	September 2019	
Vacation/Weekend Getaway	73.8%	72.9%	↓
Group Travel	23.8	24.3	↑
Visit with Friends and Relatives	11.2	9.6	↓
Special Event	7.7	7.2	↓

First Visit to (% yes)	September 2018	September 2019	
Collier County	43.5%	44.9%	↑
Florida	9.3	9.6	↑

Length of Stay (Days)	September 2018	September 2019	
In Collier County	4.4	4.5	↑

Party Size	September 2018	September 2019	
Number of People	2.3	2.4	↑

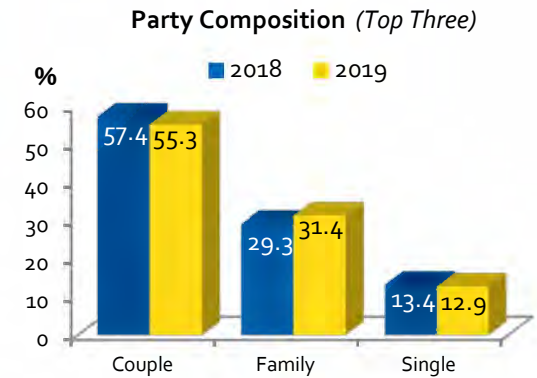


Naples, Marco Island, Everglades Visitor Profile

September 2019

Party Composition (Multiple Response)

	September 2018	September 2019	
Couple	57.4%	55.3%	↓
Family	29.3	31.4	↑
Single	13.4	12.9	↓
Group of Friends	8.2	8.9	↑

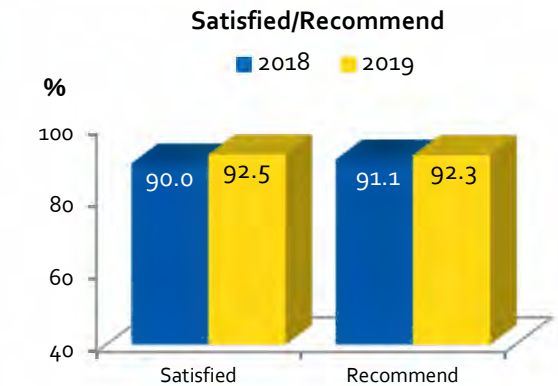


Did Party Have Lodging Reservations for Stay

	September 2018	September 2019	
% Yes	93.4%	94.0%	↑

Expense Relative to Expectations

	September 2018	September 2019	
More Expensive	17.9%	23.4%	↑
Less Expensive	5.7	4.8	↓
As Expected	64.1	63.9	↓



Satisfaction with Collier County

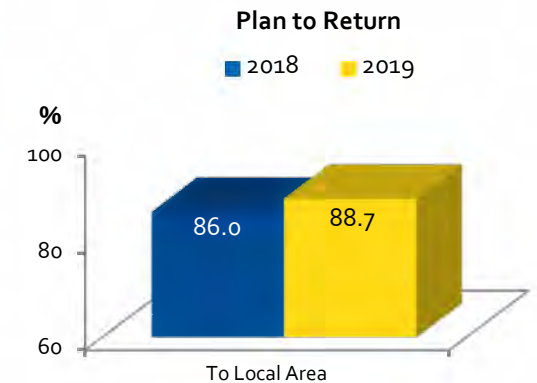
	September 2018	September 2019	
Very Satisfied	81.8%	83.5%	↑
Satisfied	8.2	9.0	↑
Satisfaction Level (Combined)	90.0%	92.5%	↑

Recommend Collier to Friends/Relatives

	September 2018	September 2019	
% Yes	91.1%	92.3%	↑

Plan to Return (% Yes)

	September 2018	September 2019	
To Local Area	86.0%	88.7%	↑



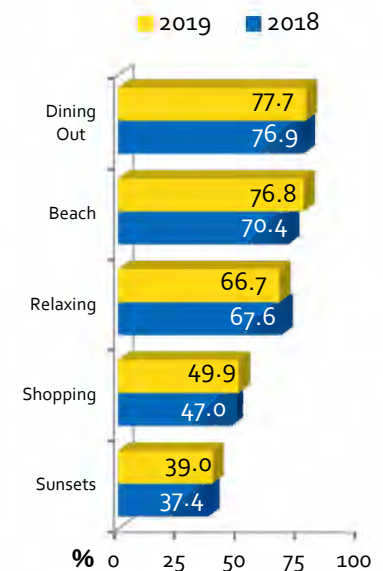
Naples, Marco Island, Everglades Visitor Profile

September 2019

Activities Enjoyed in Area (Multiple Response)

	September 2018	September 2019	
Dining Out	76.9%	77.7%	↑
Beach	70.4	76.8	↑
Relaxing	67.6	66.7	↓
Shopping	47.0	49.9	↑
Sunsets	37.4	39.0	↑
Pool	36.2	34.4	↓
Sightseeing	30.9	33.7	↑
Enjoying Nature/Bird Watching/Everglades	26.8	29.3	↑
Swimming	20.1	25.4	↑
Reading	19.4	23.0	↑
Walking	21.0	22.7	↑
Shelling	18.9	20.6	↑
Sunning	15.4	15.7	↑
Bars/Nightlife	14.0	15.4	↑
Boating	9.3	12.7	↑
Visiting with Friends/Relatives	11.5	10.2	↓
Golfing	7.6	9.9	↑
Fishing	5.9	7.7	↑
Art Galleries/Shows/Fairs	9.0	7.5	↓

Activities Enjoyed in Area (Top Five)



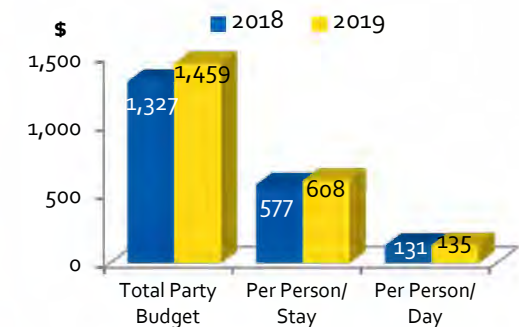
Demographics

	September 2018	September 2019	
Average Age Head of Household (Years)	46.4	47.0	↑
Median Annual Household Income	\$149,253	\$152,708	↑

Collier Base Budget

	September 2018	September 2019	
Total	\$1,327.33	\$1,458.97	↑
Per Person/Stay	577.10	607.91	↑
Per Person/Day	131.16	135.09	↑

Collier Base Budgets



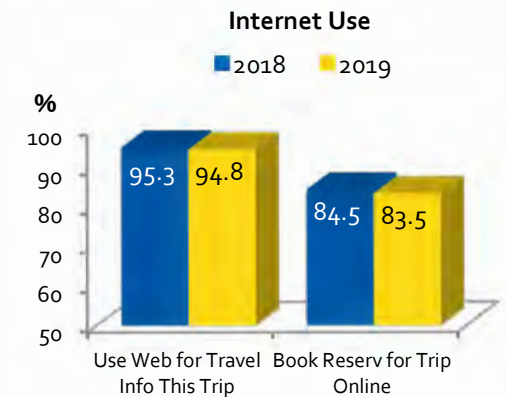
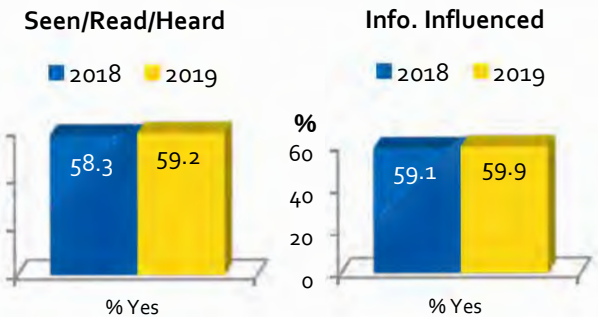
Naples, Marco Island, Everglades Visitor Profile | September 2019

Area Information Seen/Read/Heard	September 2018	September 2019
% Yes	58.3%	59.2% ↑

Directly Influenced by Information (Base: Seen/Read/Heard Area Information)	September 2018	September 2019
% Yes	59.1%	59.9% ↑

Why Chose the Area (Multiple Response)	September 2018	September 2019
Beach Area	53.1%	56.8% ↑
Relaxing	46.9	44.3 ↓
Quality of Accommodations	39.5	42.3 ↑
Quiet/Peaceful/Laid Back	40.0	40.6 ↑
Weather	38.5	40.3 ↑
Previous Experience	37.7	36.8 ↓
Not Crowded	28.8	27.4 ↓
Restaurants	19.2	26.6 ↑
Business/Meeting/Conference	25.2	26.0 ↑
Never Been	24.2	25.0 ↑
Outdoor Recreation/Nature	23.1	24.7 ↑
Appealing Brochures/Websites	17.7	20.4 ↑
Recommendation	21.2	19.2 ↓

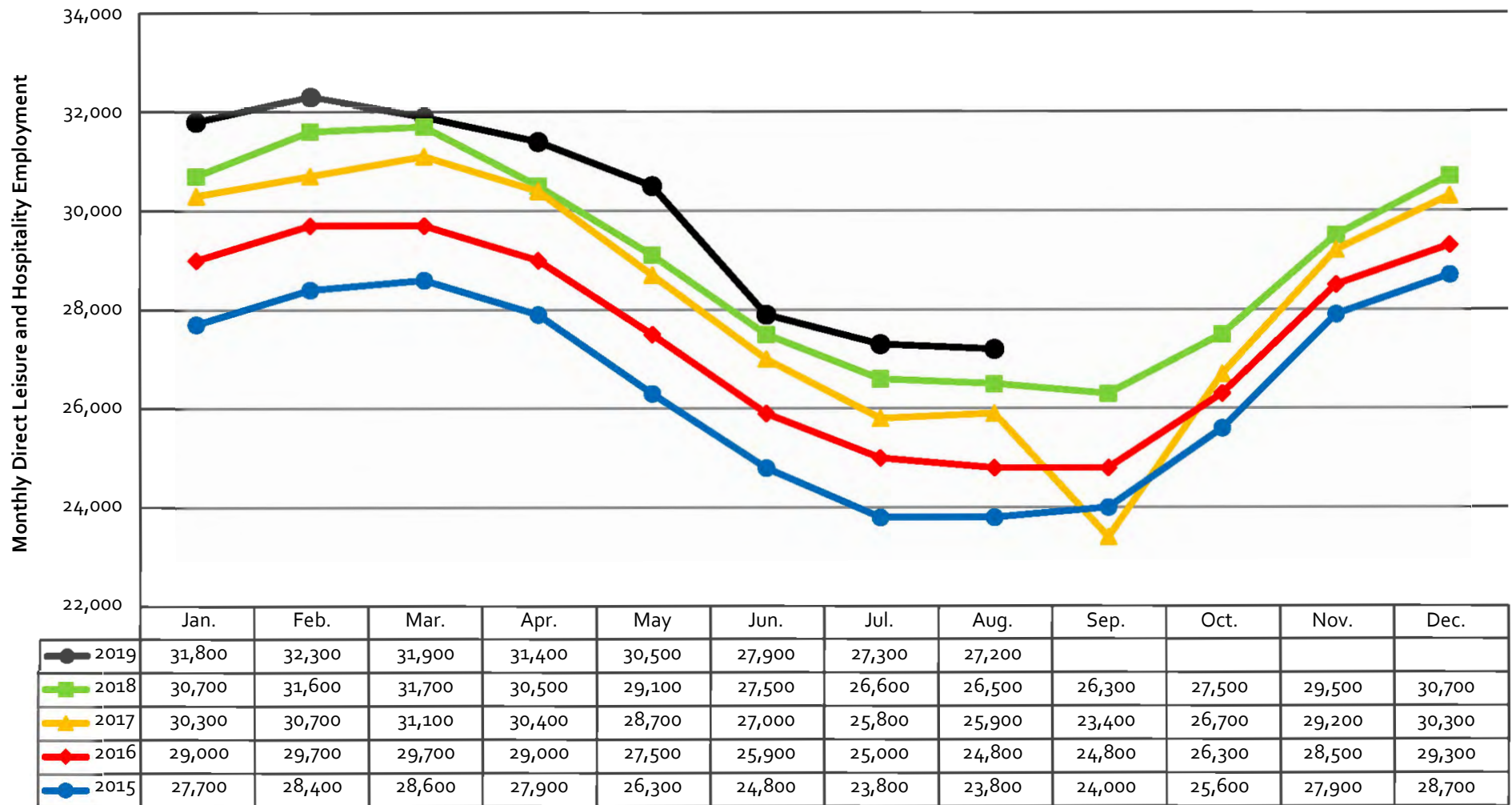
Internet Use	September 2018	September 2019
Use Internet to Obtain Travel Info for This Trip (% Yes)	95.3%	94.8% ↓
Book Reservations for Trip Online (%Yes)	84.5	83.5 ↓



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

