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Naples, Marco Island, Everglades Convention and Visitors Bureau
August 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

September 2019

Naples, Marco Island, Everglades: August 2019 Summary

Executive Summary: August 2019

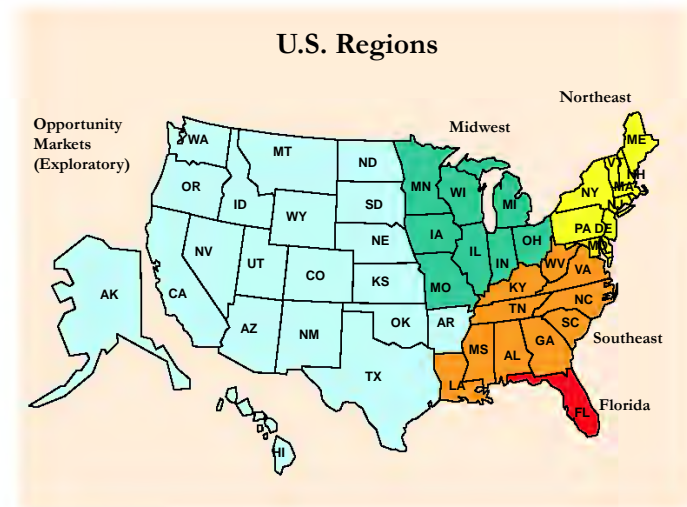
- This August, some **112,700** visitors stayed in Collier's commercial lodgings (**+9.6%**)*. Their visits contributed an estimated **\$98,949,500** of economic impact to the County (**+11.2%**). Key performance metrics are as follows:

<u>August</u>	<u>2018</u>	<u>2019</u>	<u>% Δ</u>
Occupancy	61.8%	61.9%	+0.2%
ADR	\$155.2	\$153.6	-1.0%
RevPAR	\$95.9	\$95.1	-0.8%

* Available records suggest that approximately 55 Collier lodging units remained closed in August 2019. (August 2018: 969 units)

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

<u>August Visitation</u>	<u>2019</u> <u>Visitor #</u>	<u>Δ</u>
Florida	54,321	+2.8
Southeast	5,522	+16.8
Northeast	8,791	+3.0
Midwest	10,932	+36.3
Canada	1,465	+29.5
Europe	26,259	+15.1
Other	5,410	+14.4
Total	112,700	+9.6



Naples, Marco Island, Everglades: August 2019 Summary

3. Compared to last August, **42.1%** of Collier lodging managers report their three month forward reservations levels as “up.”

% of Properties (August) Reporting Reservations:	2018	2019
Up	40.7%	42.1%
Same	20.1	41.5
Down	39.3	16.5

4. This August, almost half of the destination’s visitor parties flew (*2018: 54.4%; 2019: 55.5%*). A majority of these (**53.0%**) deplaned at RSW, with Miami capturing some **19.1%** of deplanements.
5. This August, visitor party size averaged **2.7** travelers who stayed for **3.6 nights** in the Naples, Marco Island, Everglades area (*2018: 2.6 people; 3.5 nights*).
6. Some **43.5%** of Collier’s August visitors are in the destination for the first time.
7. Fully **94.3%** consult the web for trip information, with some **83.1%** making bookings for their trip online.
8. The majority (**93.3%**) are satisfied with their Collier stay, with **94.7%** planning a future trip to the area.
9. The typical August visitor is **46.4 years of age**.

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

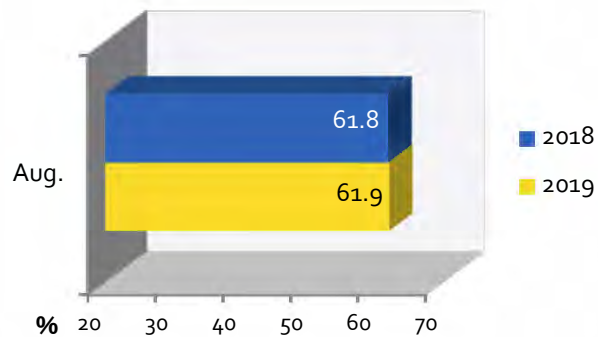


Naples, Marco Island, Everglades Visitor Profile | August 2019

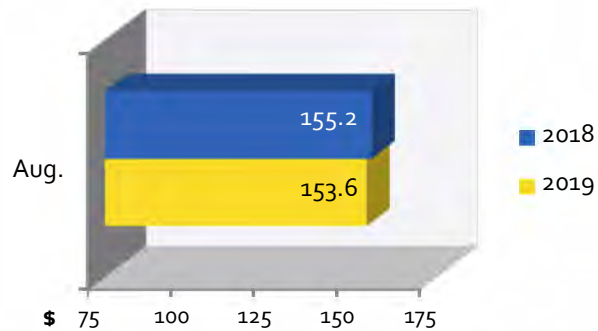
H/M/C+ Visitor Statistics	Year to Date (January – August)			August		
	2018	2019	% Δ '18/'19	2018	2019**	% Δ '18/'19
Visitors (#)	1,284,000	1,346,800	+4.9	102,800	112,700	+9.6
Room Nights	1,660,100	1,751,300	+5.5	143,600	155,400	+8.2
Direct Exp. (\$)	\$1,054,582,600	\$1,130,868,200	+7.2	\$59,691,800	\$66,364,500	+11.2
Total Eco. Impact (\$)	\$1,572,382,700	\$1,686,124,400	+7.2	\$89,000,500	\$98,949,500	+11.2

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

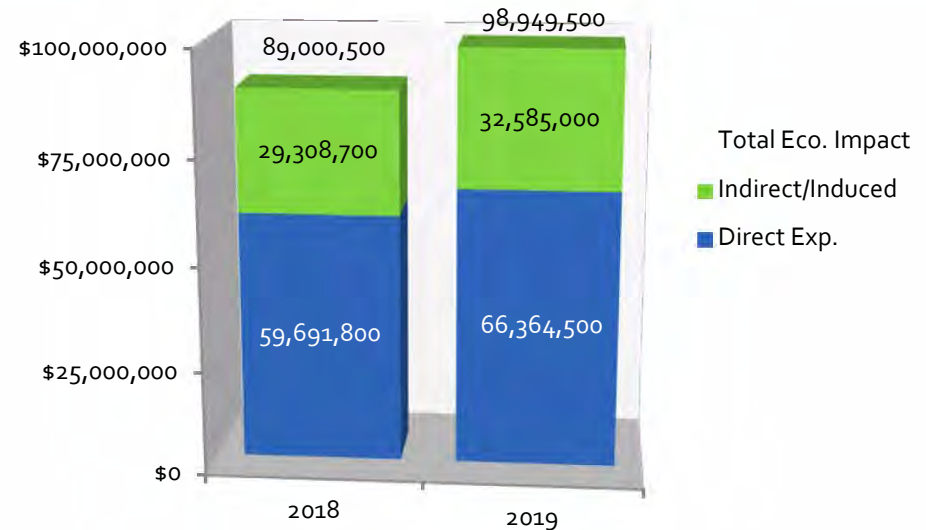
August Occupancy



August Room Rates



August Economic Impact



August

Lodging Statistics

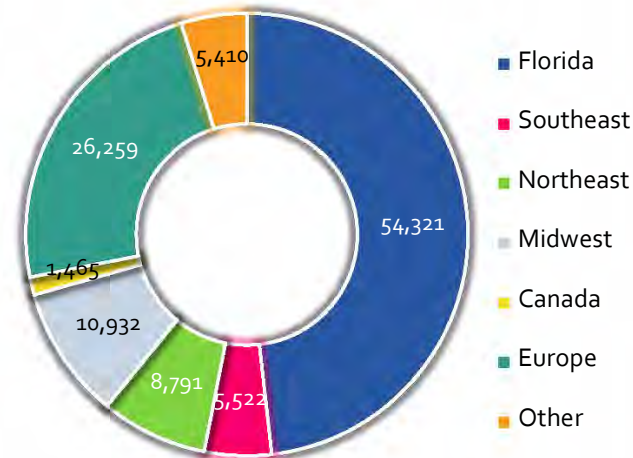
	2018	2019**	% Δ '18/'19
Occupancy	61.8%	61.9%	+0.2
Room Rates	\$155.2	\$153.6	-1.0
RevPAR	\$95.9	\$95.1	-0.8

** Note: Available records suggest that approximately 55 Collier lodging units remained closed in August 2019. (August 2018: 969 units).

August 2019 Visitor Origin Markets

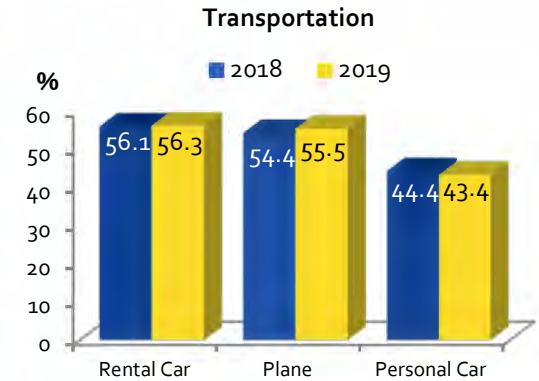
Visitor Origins	2018		2019		% Δ '18/'19
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	51.4%	52,839	48.2%	54,321	+2.8
Southeast	4.6	4,729	4.9	5,522	+16.8
Northeast	8.3	8,532	7.8	8,791	+3.0
Midwest	7.8	8,018	9.7	10,932	+36.3
Canada	1.1	1,131	1.3	1,465	+29.5
Europe	22.2	22,822	23.3	26,259	+15.1
Other	4.6	4,729	4.8	5,410	+14.4
Total	100.0	102,800	100.0	112,700	+9.6

August 2019 Visitor Origins

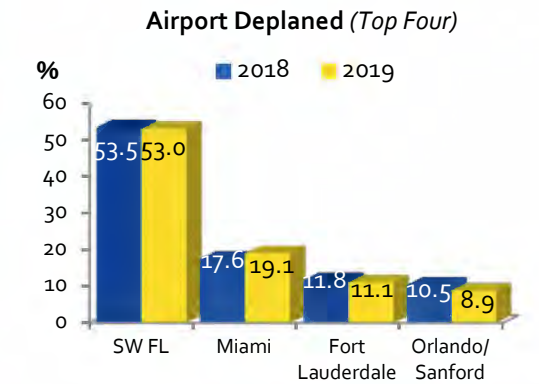


Naples, Marco Island, Everglades Visitor Profile | August 2019

Transportation Mode (Multiple Response)	August 2018	August 2019	
Rental Car	56.1%	56.3%	↑
Plane	54.4	55.5	↑
Personal Car	44.4	43.4	↓

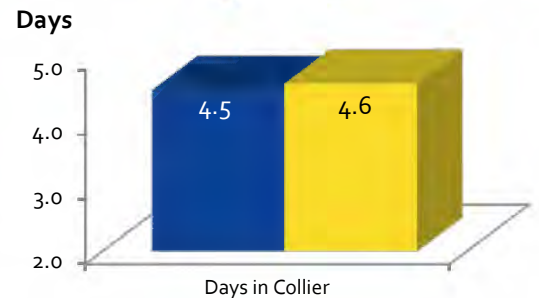


Airport Deplened (Base: Flew)	August 2018	August 2019	
Southwest Florida International	53.5%	53.0%	↓
Miami International	17.6	19.1	↑
Ft. Lauderdale International	11.8	11.1	↓
Orlando International/Sanford	10.5	8.9	↓
Tampa International	5.3	6.0	↑



Purpose of Trip (Multiple Response)	August 2018	August 2019	
Vacation/Weekend Getaway	80.0%	81.7%	↑
Group Travel	21.1	20.5	↓
Visit with Friends and Relatives	9.4	9.0	↓
Special Event	6.8	5.2	↓

Length of Stay in Collier County (Days)



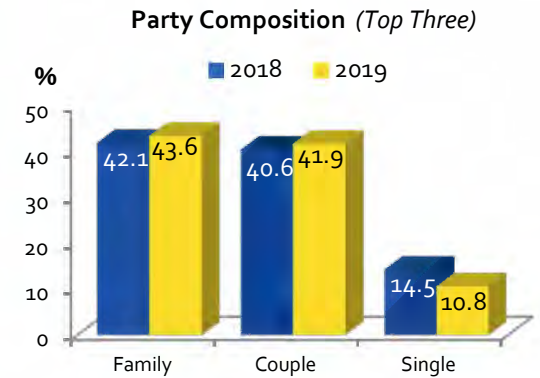
First Visit to (% yes)	August 2018	August 2019	
Collier County	45.2%	43.5%	↓
Florida	11.1	10.7	↓

Length of Stay (Days)	August 2018	August 2019	
In Collier County	4.5	4.6	↑

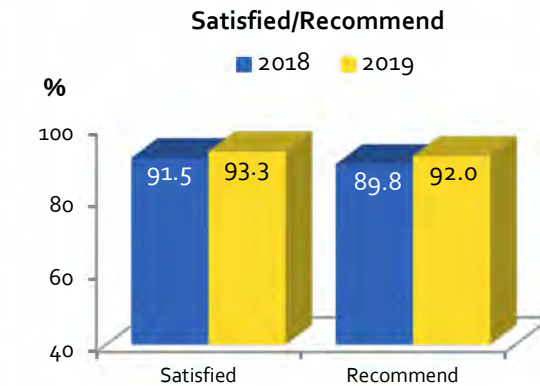
Party Size	August 2018	August 2019	
Number of People	2.6	2.7	↑

Naples, Marco Island, Everglades Visitor Profile | August 2019

Party Composition (Multiple Response)	August 2018	August 2019	
Family	42.1%	43.6%	↑
Couple	40.6	41.9	↑
Single	14.5	10.8	↓
Group of Friends	3.1	3.0	↓



Did Party Have Lodging Reservations for Stay	August 2018	August 2019	
% Yes	95.0%	94.6%	↓



Expense Relative to Expectations	August 2018	August 2019	
More Expensive	18.8%	16.8%	↓
Less Expensive	6.3	9.0	↑
As Expected	71.9	70.8	↓

Satisfaction with Collier County	August 2018	August 2019	
Very Satisfied	83.0%	85.0%	↑
Satisfied	8.5	8.3	↓
Satisfaction Level (Combined)	91.5%	93.3%	↑



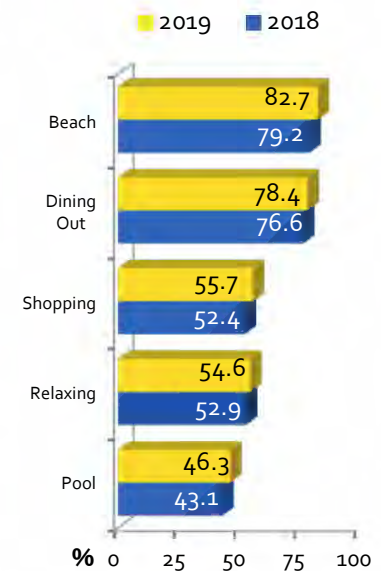
Recommend Collier to Friends/Relatives	August 2018	August 2019	
% Yes	89.8%	92.0%	↑

Plan to Return (% Yes)	August 2018	August 2019	
To Local Area	93.2%	94.7%	↑

Naples, Marco Island, Everglades Visitor Profile | August 2019

Activities Enjoyed in Area (Multiple Response)	August 2018	August 2019	
Beach	79.2%	82.7%	↑
Dining Out	76.6	78.4	↑
Shopping	52.4	55.7	↑
Relaxing	52.9	54.6	↑
Pool	43.1	46.3	↑
Sunsets	40.9	44.8	↑
Sightseeing	38.3	38.7	↑
Reading	30.5	32.4	↑
Sunning	28.0	26.4	↓
Walking	23.6	26.1	↑
Swimming	22.4	23.8	↑
Enjoying Nature/Bird Watching/Everglades	20.4	23.6	↑
Bars/Nightlife	20.8	21.8	↑
Shelling	12.3	17.5	↑
Art Galleries/Shows/Fairs	10.2	11.2	↑
Visiting with Friends/Relatives	12.5	10.9	↓
Fishing	7.8	10.7	↑
Boating	6.9	8.3	↑
Golfing	7.4	7.9	↑

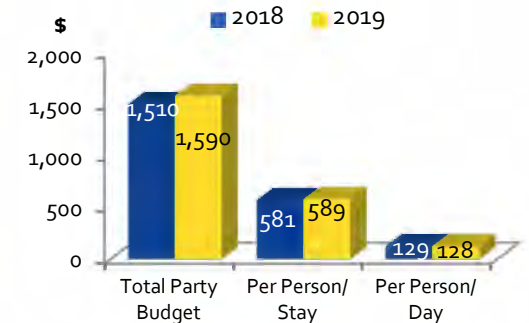
Activities Enjoyed in Area (Top Five)



Demographics	August 2018	August 2019	
Average Age Head of Household (Years)	46.1	46.4	↑
Median Annual Household Income	\$155,793	\$158,955	↑

Collier Base Budget	August 2018	August 2019	
Total	\$1,509.72	\$1,589.92	↑
Per Person/Stay	580.66	588.86	↑
Per Person/Day	129.04	128.01	↓

Collier Base Budgets



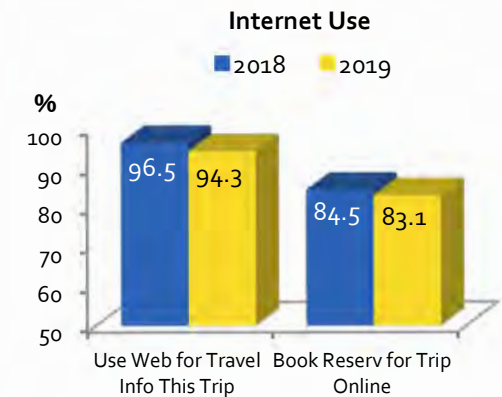
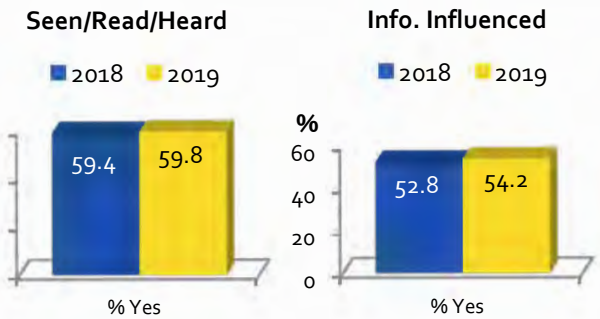
Naples, Marco Island, Everglades Visitor Profile | August 2019

Area Information Seen/Read/Heard	August 2018	August 2019	
% Yes	59.4%	59.8%	↑

Directly Influenced by Information (Base: Seen/Read/Heard Area Information)	August 2018	August 2019	
% Yes	52.8%	54.2%	↑

Why Chose the Area (Multiple Response)	August 2018	August 2019	
Beach Area	57.3%	62.5%	↑
Quality of Accommodations	49.5	53.8	↑
Quiet/Peaceful/Laid Back	47.5	48.1	↑
Relaxing	36.1	39.9	↑
Previous Experience	36.5	39.3	↑
Restaurants	34.0	37.5	↑
Weather	30.1	30.8	↑
Not Crowded	31.3	30.0	↓
Outdoor Recreation/Nature	25.0	25.5	↑
Appealing Brochures/Websites	23.2	23.8	↑
Never Been	21.9	19.1	↓
Business/Meeting/Conference	17.7	17.1	↓
Recommendation	19.5	16.4	↓

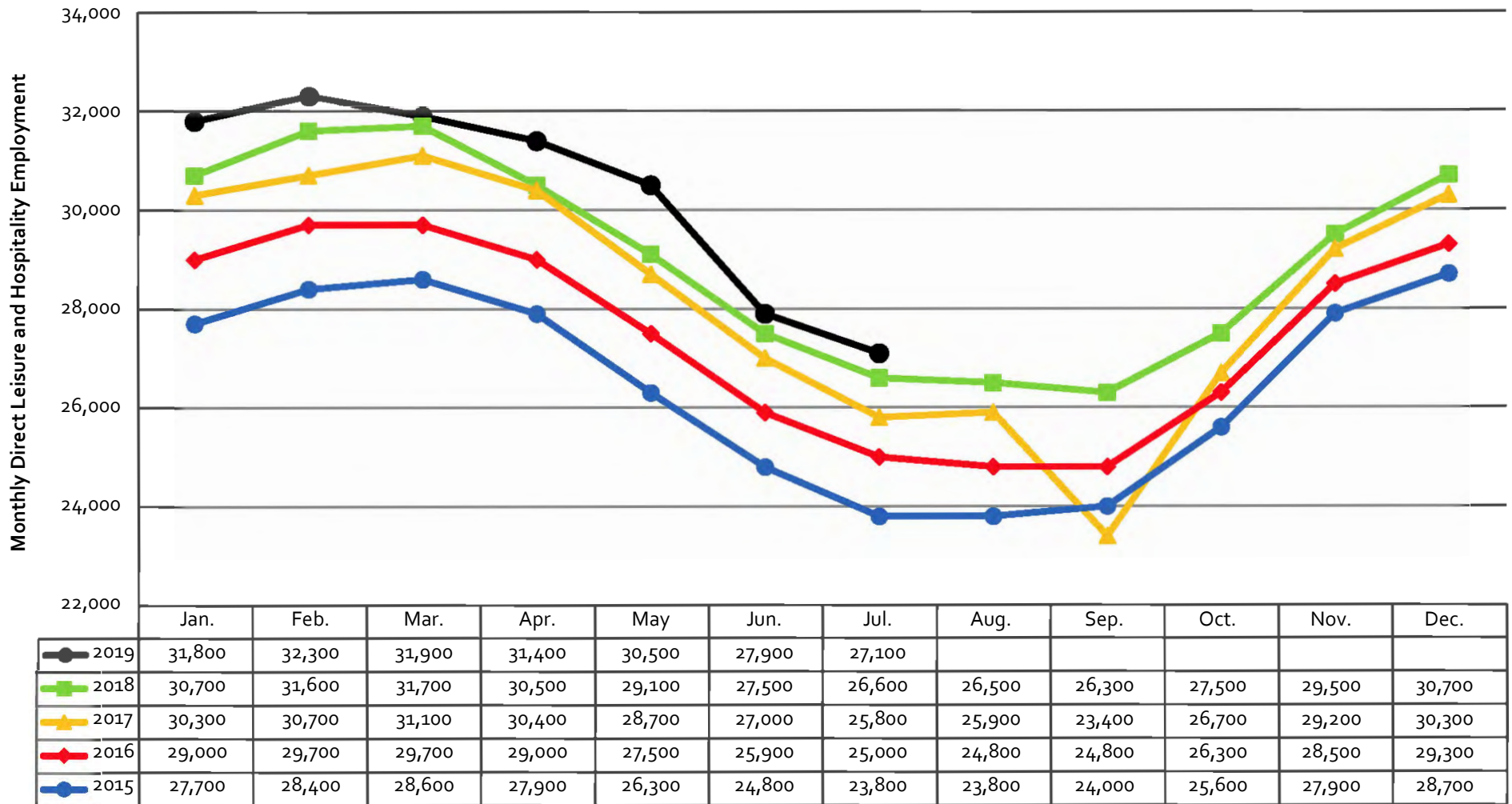
Internet Use	August 2018	August 2019	
Use Internet to Obtain Travel Info for This Trip (% Yes)	96.5%	94.3%	↓
Book Reservations for Trip Online (%Yes)	84.5	83.1	↓



Industry Data: *2015 - 2019*

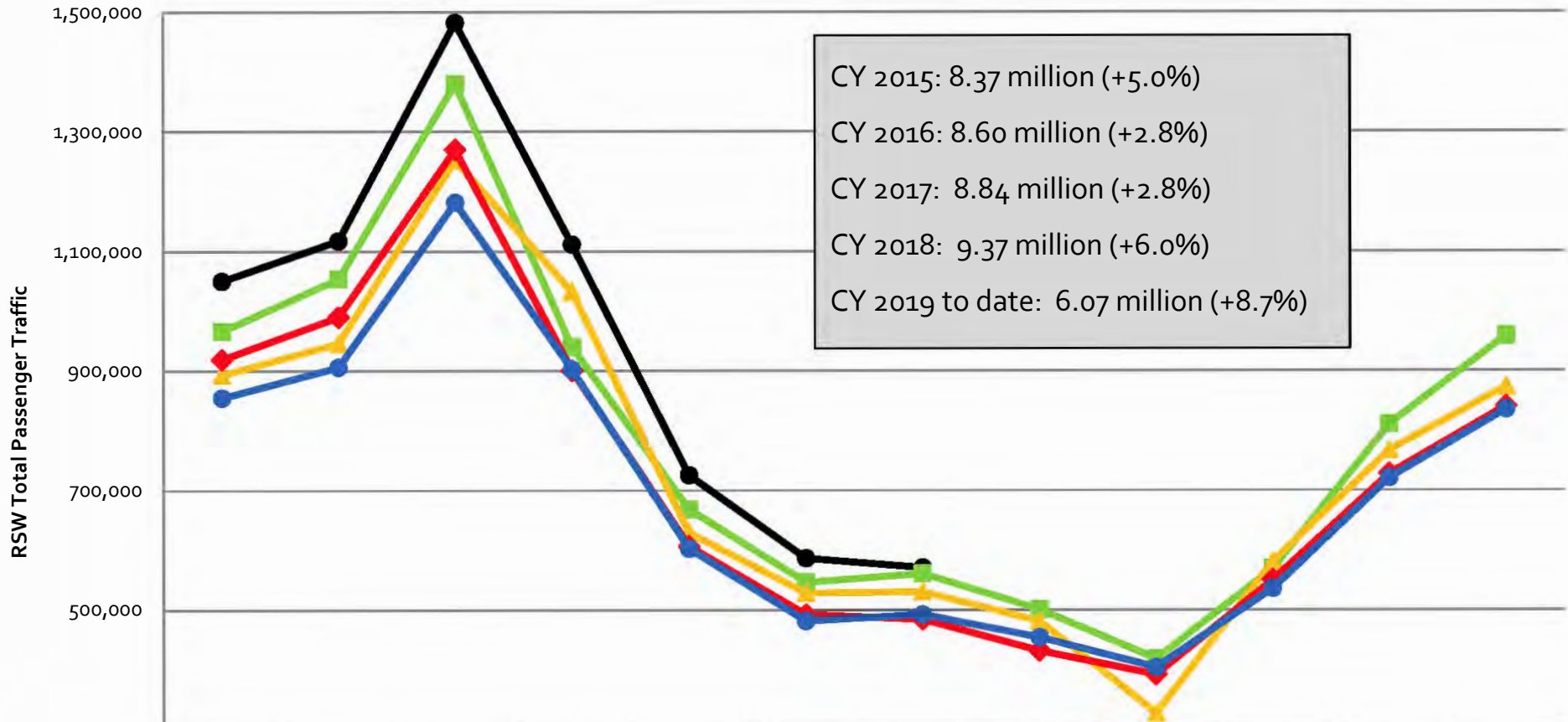


Collier Direct Leisure and Hospitality Employment (Calendar Year) *



* 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					
■ 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