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Naples, Marco Island, Everglades Convention and Visitors Bureau January 2020 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

February 2020

Naples, Marco Island, Everglades: January 2020 Summary

Executive Summary: January 2020

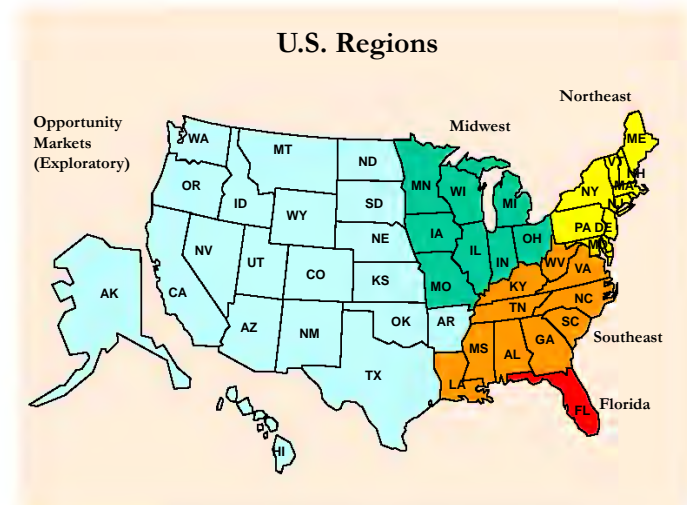
- This January, some **204,000** visitors stayed in Collier's commercial lodgings **(+6.8%)***. Their visits contributed an estimated **\$216,348,900** of economic impact to the County **(+11.6%)**. Key performance metrics are as follows:

<u>January</u>	<u>2019</u>	<u>2020*</u>	<u>% Δ</u>
Occupancy	79.4%	81.0%	+2.0%
ADR	\$259.10	\$267.45	+3.2%
RevPAR	\$205.70	\$216.63	+5.3%

* According to the Florida Department of Business and Professional Regulation (DBPR), Collier transient lodging inventory has grown by 659 units (+6.6%) since January of 2019. (2019: 10,007; 2020: 10,666)

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

<u>January Visitation</u>	<u>2020</u> <u>Visitor #</u>	<u>Δ</u>
Florida	63,036	+7.9
Southeast	13,056	+10.3
Northeast	57,324	+8.7
Midwest	33,864	+13.7
Canada	3,264	-22.3
Europe	24,072	-8.7
Other	9,384	+22.8
Total	204,000	+6.8



Naples, Marco Island, Everglades: January 2020 Summary

3. Half of Collier lodging managers surveyed in February 2020 report their three month forward reservations levels as “up” relative to this time last year.

% of Properties		
Reporting Reservations:	2019	2020
Up	40.3%	50.0%
Same	29.4	35.3
Down	30.3	14.7

4. This January, two-thirds of the destination’s visitor parties flew (2019: 67.1%; 2020: 69.0%). A majority of these (73.6%) deplaned at RSW, with Miami capturing some 10.0% of deplanements.
5. This January, visitor party size averaged 2.5 travelers who stayed for 3.2 nights in the Naples, Marco Island, Everglades area (2019: 2.4 people; 3.0 nights).
6. Some 40.6% of Collier’s January visitors are in the destination for the first time.
7. Fully 94.5% consult the web for trip information, with some 79.2% making bookings for their trip online.
8. The majority (93.8%) are satisfied with their Collier stay, with 90.9% planning a future trip to the area.
9. The typical January visitor is 51.8 years of age.

Naples, Marco Island, Everglades: *January 2020 Visitor Profile*

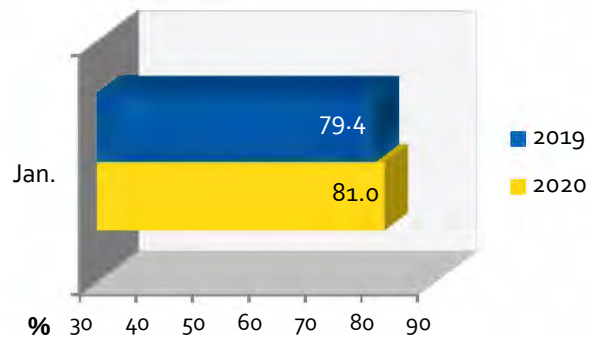


Naples, Marco Island, Everglades Visitor Profile | January 2020

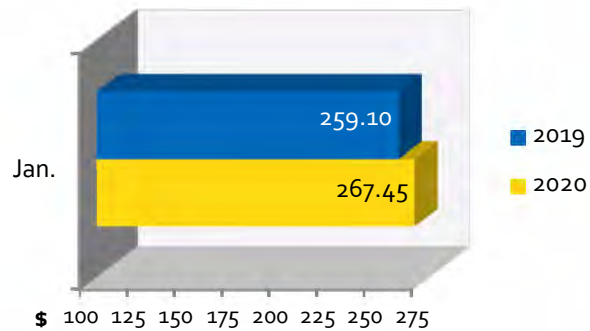
H/M/C+ Visitor Statistics	Calendar Year (January – December)			January		
	2018	2019	% Δ '18/'19	2019	2020	% Δ '19/'20
Visitors (#)	1,823,300	1,928,600	+5.8	191,000	204,000	+6.8
Room Nights	2,380,700	2,532,900	+6.4	238,000	261,100	+9.7
Direct Exp. (\$)	\$1,436,686,500	\$1,552,496,600	+8.1	\$130,006,100	\$145,103,200	+11.6
Total Eco. Impact (\$)	\$2,142,099,700	\$2,314,772,500	+8.1	\$193,839,100	\$216,348,900	+11.6

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

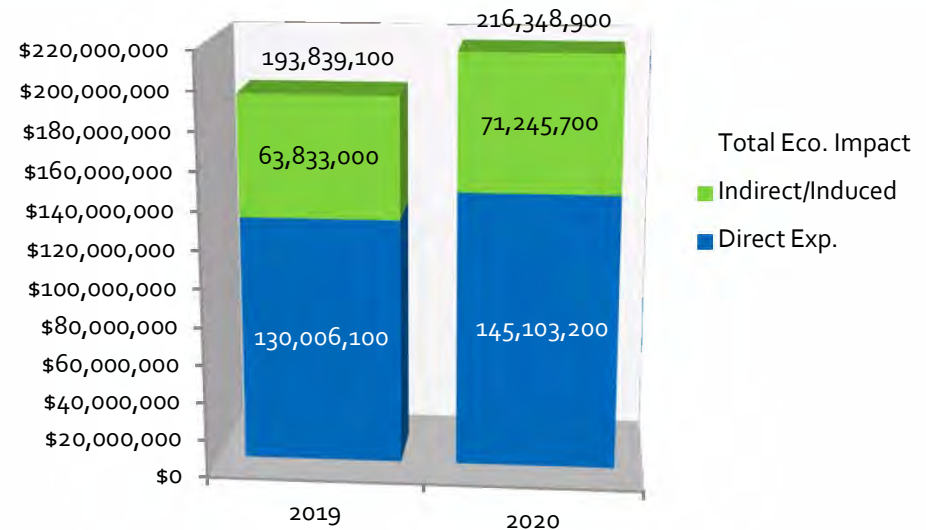
January Occupancy



January Room Rates



January Economic Impact



January

Lodging Statistics

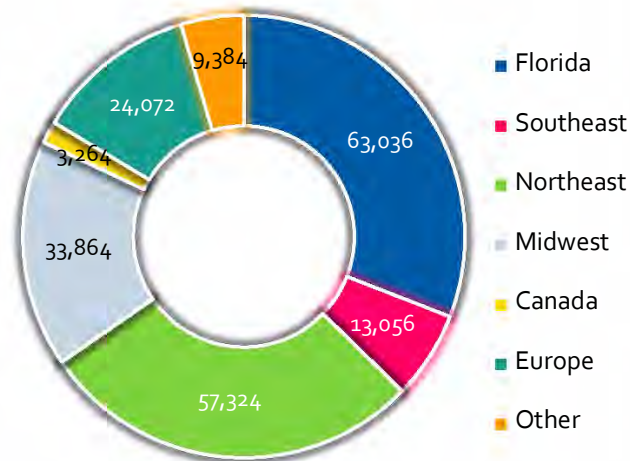
	2019	2020*	% Δ '19/'20
Occupancy	79.4%	81.0%	+2.0
Room Rates	\$259.10	\$267.45	+3.2
RevPAR	\$205.70	\$216.63	+5.3

* According to the Florida Department of Business and Professional Regulation (DBPR), Collier transient lodging inventory has grown by 659 units (+6.6%) since January of 2019. (2019: 10,007; 2020: 10,666)

January 2020 Visitor Origin Markets

Visitor Origins	2019		2020		% Δ '19/'20
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	30.6%	58,446	30.9%	63,036	+7.9
Southeast	6.2	11,842	6.4	13,056	+10.3
Northeast	27.6	52,716	28.1	57,324	+8.7
Midwest	15.6	29,796	16.6	33,864	+13.7
Canada	2.2	4,202	1.6	3,264	-22.3
Europe	13.8	26,358	11.8	24,072	-8.7
Other	4.0	7,640	4.6	9,384	+22.8
Total	100.0	191,000	100.0	204,000	+6.8

January 2020 Visitor Origins



Naples, Marco Island, Everglades Visitor Profile | January 2020

Transportation Mode (Multiple Response)	January 2019	January 2020	
Plane	67.1%	69.0%	↑
Rental Car	62.9	61.1	↓
Personal Car	32.3	30.6	↓

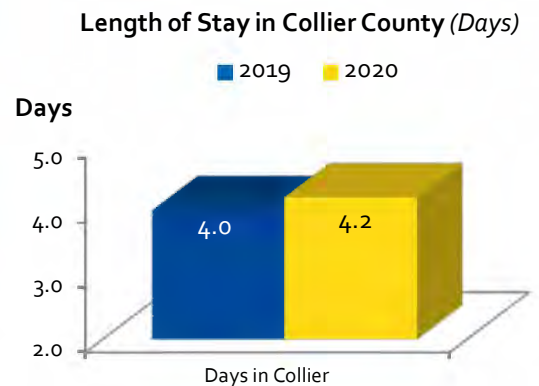
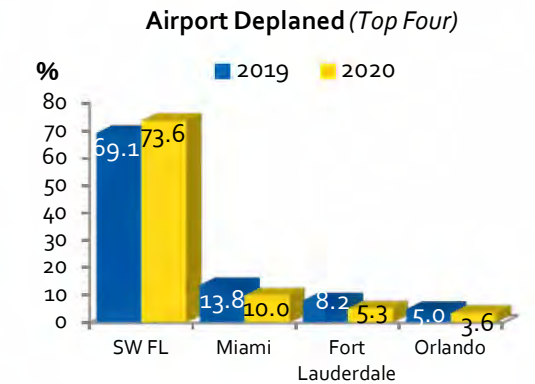
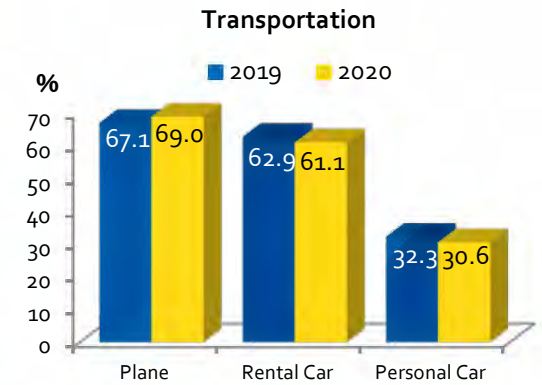
Airport Deplened (Base: Flew)	January 2019	January 2020	
Southwest Florida International	69.1%	73.6%	↑
Miami International	13.8	10.0	↓
Ft. Lauderdale International	8.2	5.3	↓
Orlando International/Sanford	5.0	3.6	↓
Tampa International	3.4	2.7	↓

Purpose of Trip (Multiple Response)	January 2019	January 2020	
Vacation/Weekend Getaway	72.7%	73.6%	↑
Group Travel	39.2	41.5	↑
Visit with Friends and Relatives	11.6	13.2	↑
Special Event	10.6	8.6	↓

First Visit to (% yes)	January 2019	January 2020	
Collier County	41.8%	40.6%	↓
Florida	5.8	7.8	↑

Length of Stay (Days)	January 2019	January 2020	
In Collier County	4.0	4.2	↑

Party Size	January 2019	January 2020	
Number of People	2.4	2.5	↑



Naples, Marco Island, Everglades Visitor Profile | January 2020

Party Composition <i>(Multiple Response)</i>	January 2019	January 2020	
Couple	64.4%	68.0%	↑
Family	21.6	20.9	↓
Single	15.6	14.0	↓
Extended Family	5.1	3.9	↓
Group of Friends	2.4	3.1	↑

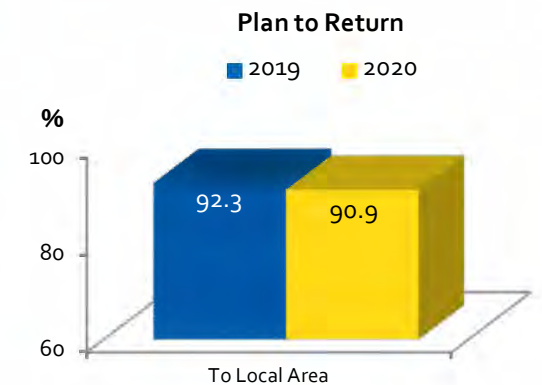
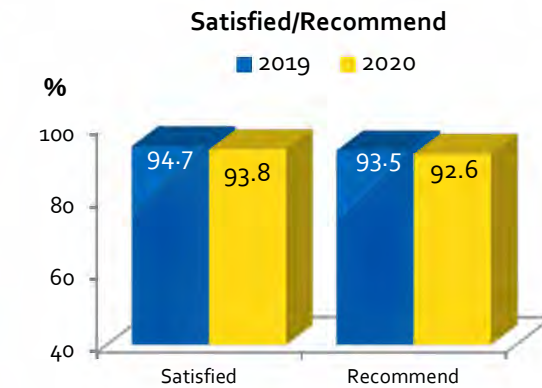
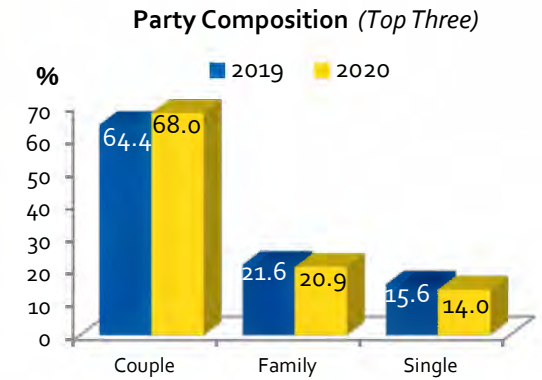
Did Party Have Lodging Reservations for Stay	January 2019	January 2020	
% Yes	95.8%	96.7%	↑

Expense Relative to Expectations	January 2019	January 2020	
More Expensive	19.1%	12.5%	↓
Less Expensive	2.5	1.8	↓
As Expected	70.4	72.7	↑

Satisfaction with Collier County	January 2019	January 2020	
Very Satisfied	91.7%	89.7%	↓
Satisfied	3.0	4.1	↑
Satisfaction Level (Combined)	94.7%	93.8%	↓

Recommend Collier to Friends/Relatives	January 2019	January 2020	
% Yes	93.5%	92.6%	↓

Plan to Return (% Yes)	January 2019	January 2020	
To Local Area	92.3%	90.9%	↓

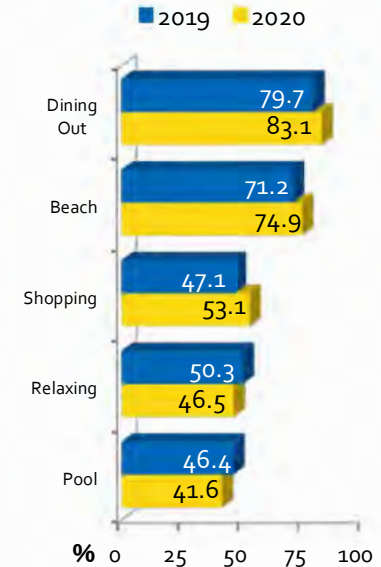


Naples, Marco Island, Everglades Visitor Profile | January 2020

Activities Enjoyed in Area (Multiple Response)

	January 2019	January 2020	
Dining Out	79.7%	83.1%	↑
Beach	71.2	74.9	↑
Shopping	47.1	53.1	↑
Relaxing	50.3	46.5	↓
Pool	46.4	41.6	↓
Sunsets	31.0	27.9	↓
Art Galleries/Shows/Fairs	22.9	26.0	↑
Reading	27.1	24.3	↓
Walking	24.8	23.7	↓
Visiting with Friends/Relatives	22.8	21.6	↓
Sunning	22.3	18.8	↓
Enjoying Nature/Bird Watching/Everglades	19.2	18.6	↓
Sightseeing	20.8	17.9	↓
Bars/Nightlife	18.8	17.7	↓
Museums	11.4	13.3	↑
Golfing	11.1	12.5	↑
Swimming	13.8	10.5	↓

Activities Enjoyed in Area (Top Five)



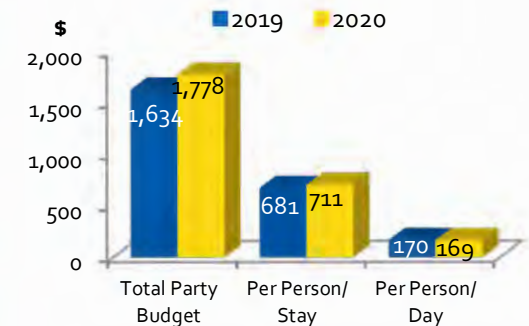
Demographics

	January 2019	January 2020	
Average Age Head of Household (Years)	52.3	51.8	↓
Median Annual Household Income	\$156,289	\$161,224	↑

Collier Base Budget

	January 2019	January 2020	
Total	\$1,633.58	\$1,778.22	↑
Per Person/Stay	680.66	711.29	↑
Per Person/Day	170.16	169.35	↓

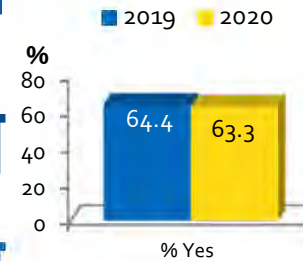
Collier Base Budgets



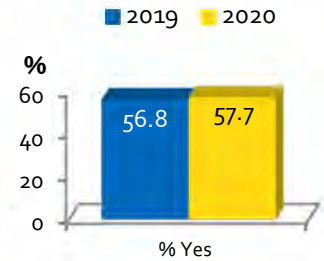
Naples, Marco Island, Everglades Visitor Profile | January 2020

Area Information Seen/Read/Heard	January 2019	January 2020	
% Yes	64.4%	63.3%	↓
Directly Influenced by Information (Base: Seen/Read/Heard Area Information)			
	January 2019	January 2020	
% Yes	56.8%	57.7%	↑
Why Chose the Area (Multiple Response)			
	January 2019	January 2020	
Beach Area	50.2%	53.1%	↑
Weather	47.8	46.9	↓
Business/Meeting/Conference	38.3	40.4	↑
Quiet/Peaceful/Laid Back	37.0	34.2	↓
Previous Experience	32.4	34.0	↑
Restaurants	29.4	30.0	↑
Quality of Accommodations	26.8	29.3	↑
Outdoor Recreation/Nature	30.4	28.6	↓
Appealing Brochures/Websites	26.4	27.9	↑
Relaxing	33.2	27.3	↓
Never Been	27.8	26.0	↓
Recommendation	20.3	25.0	↑
Not Crowded	21.4	18.6	↓
Internet Use			
	January 2019	January 2020	
Use Internet to Obtain Travel Info for This Trip (% Yes)	93.8%	94.5%	↑
Book Reservations for Trip Online (%Yes)	80.0	79.2	↓

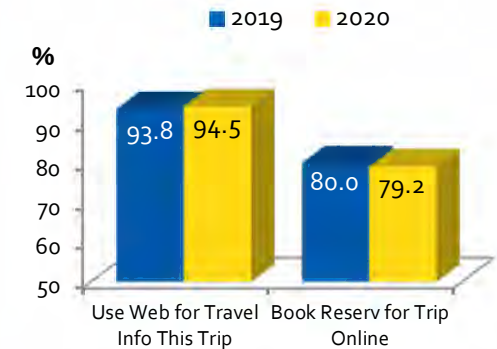
Seen/Read/Heard



Info. Influenced



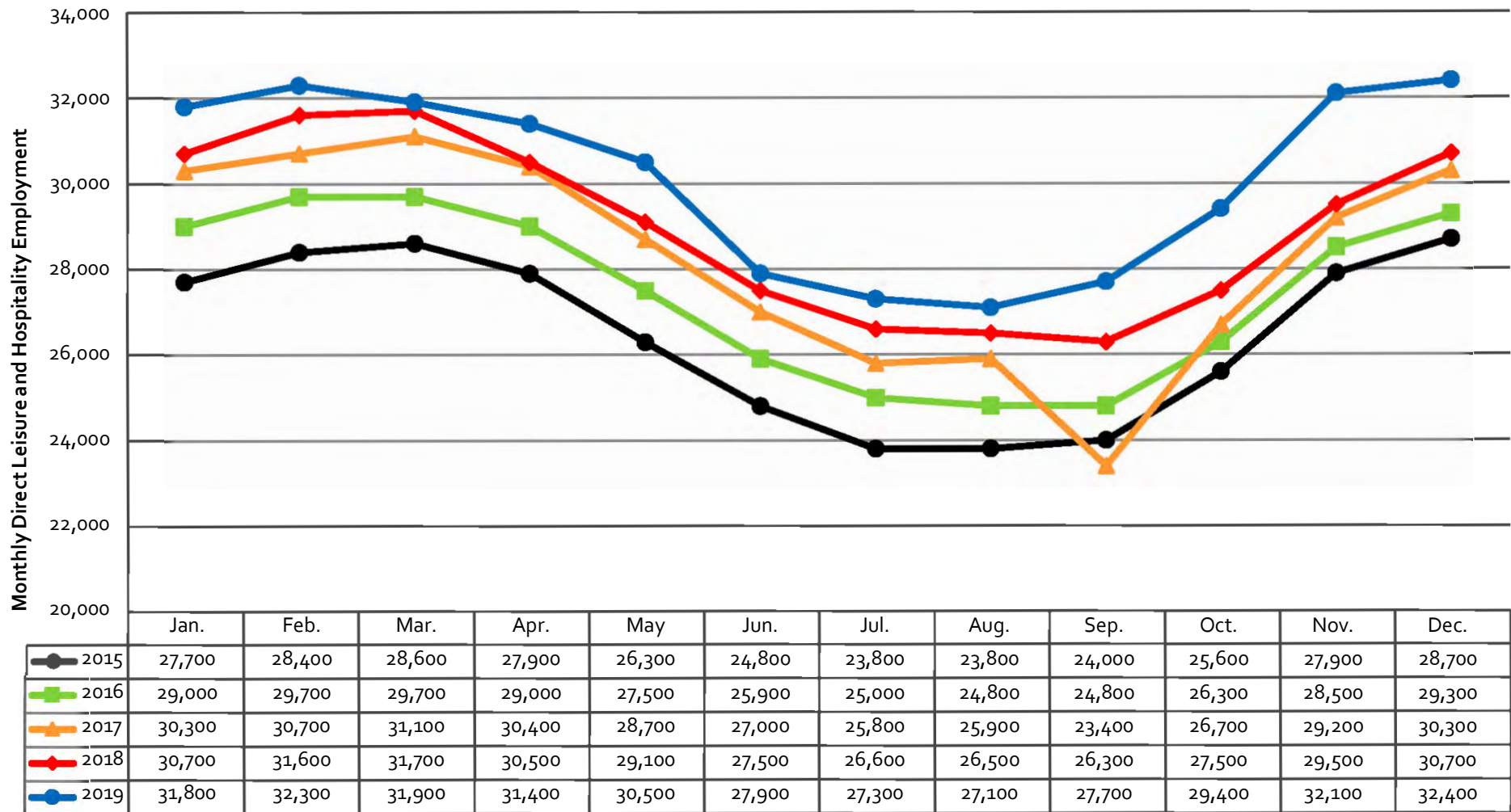
Internet Use



Industry Data:
2015 - 2019

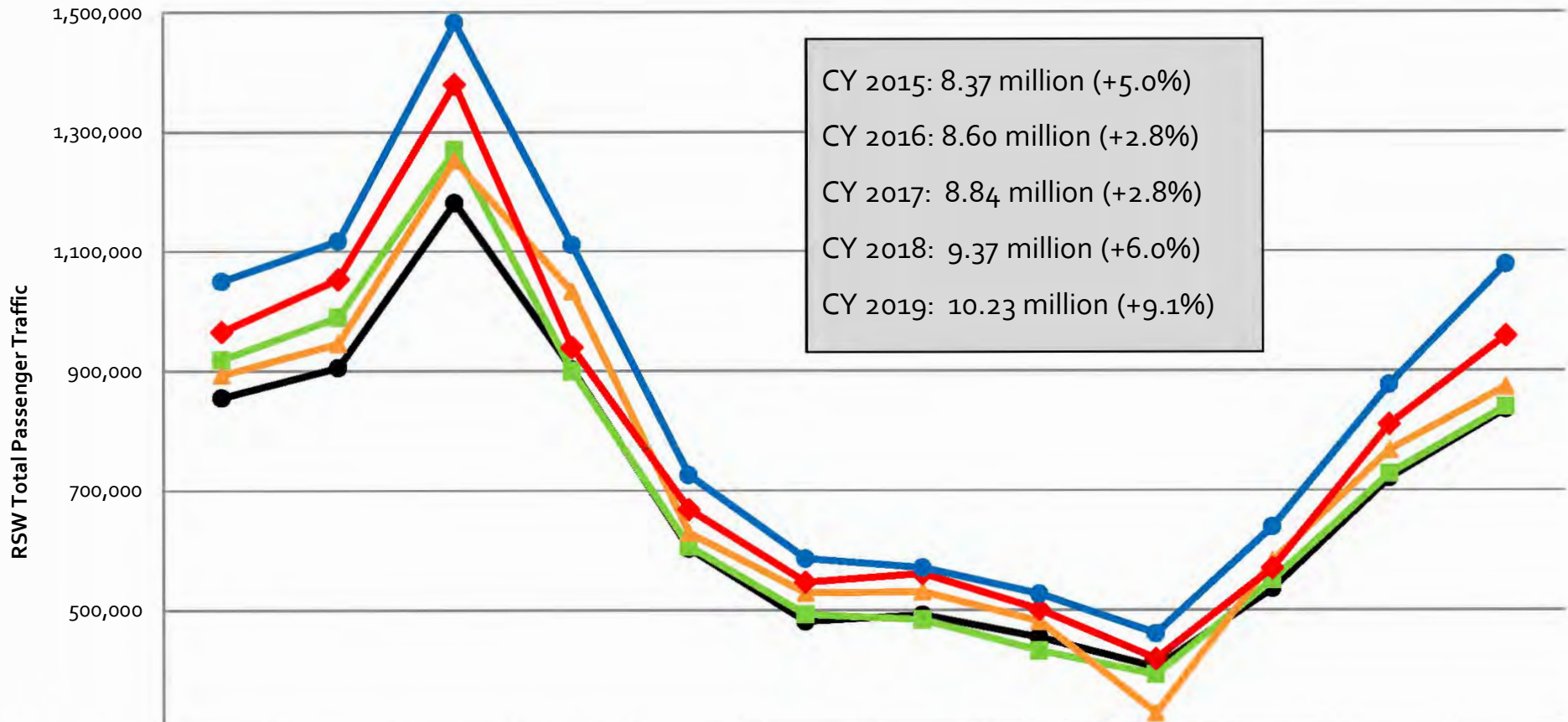


Collier Direct Leisure and Hospitality Employment (Calendar Year) *



* Source: Florida Department of Economic Opportunity/U.S. Department of Labor.

Southwest Florida International Airport (RSW) Passenger Traffic



	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
● 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
■ 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
▲ 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
◆ 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
● 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	876,703	1,077,818