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Naples, Marco Island, Everglades Convention and Visitors Bureau October 2017 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 2017

Naples, Marco Island, Everglades: October 2017 Summary

Executive Summary: October 2017

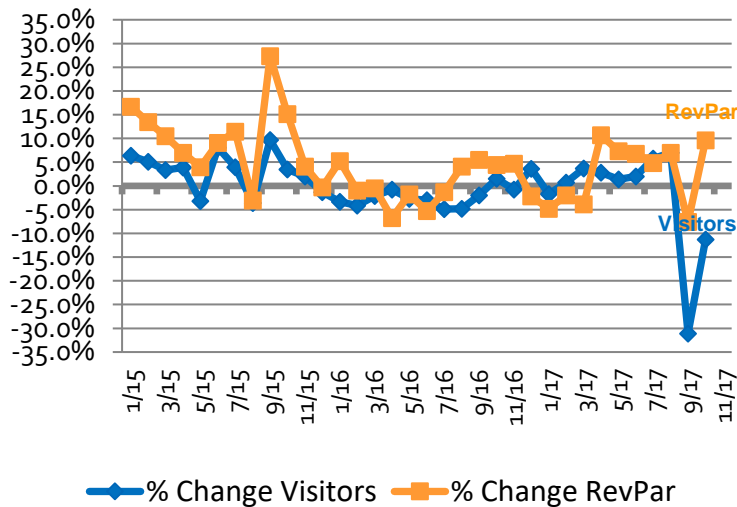
- This October, some **139,100** visitors stayed in Collier's commercial lodgings (-11.3%)*. Their visits contributed an estimated **\$127,141,300** of economic impact to the County (-8.5%). Key performance metrics are as follows:

<u>October</u>	<u>2016</u>	<u>2017**</u>	<u>% Δ</u>
Occupancy	74.7%	79.3%	+6.2%
ADR	\$157.4	\$162.5	+3.2%
RevPAR	\$117.6	\$128.9	+9.6%

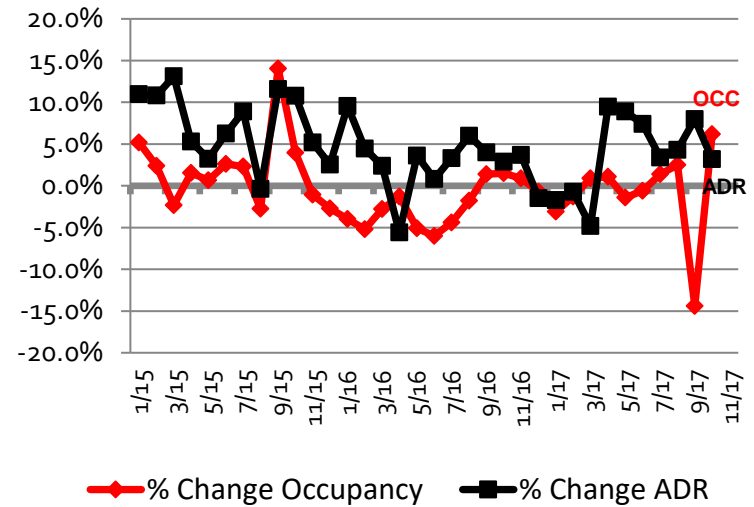
* Available records suggest that approximately 1,600 lodging units were closed in October 2017.

** Based on units available to be rented.

Key Collier Visitation Metrics (%Δ)



Key Collier Visitation Metrics (%Δ)



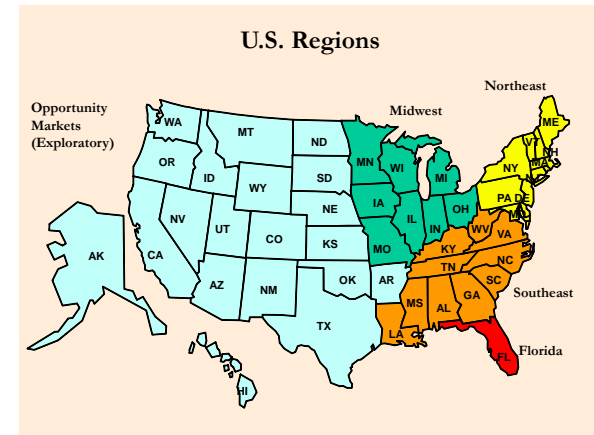
Naples, Marco Island, Everglades: October 2017 Summary

2. Compared to last October, eight out of ten (**81.4%**) lodging managers report their three month forward reservations levels as “up” or the “same:”

% of Properties (October)		
<u>Reporting Reservations:</u>		
	<u>2016</u>	<u>2017</u>
Up	40.0%	48.1%
Same	29.8	33.3
Down	30.2	18.5

3. Collier’s October visitation originates from the following primary market segments:

<u>October Visitation</u>	<u>2017</u> <u>Visitor #</u>	<u>Δ</u>
Florida	54,805	-10.4%
Southeast	7,790	+5.6
Northeast	19,613	-13.8
Midwest	18,083	-6.3
Canada	2,643	-23.4
Europe	30,741	-13.7
West	5,425	-24.8
Total	139,100	-11.3%



4. This October, better than half of the destination’s patrons flew (**2016: 59.0%; 2017: 56.7%**). A majority of these (**60.3%**) deplaned at RSW, with Miami capturing some **22.3%** of deplanements.
5. This October, visitor party size averaged **2.6** travelers who stayed for **3.7** nights in the Naples, Marco Island, Everglades area (**2016: 2.5 people; 3.5 nights**).
6. Some **36.2%** of Collier’s October visitors are in the destination for the first time (**2016: 42.7%**).

Naples, Marco Island, Everglades: October 2017 Summary

- 7.** Fully **93.7%** consult the web for trip information, with some **92.0%** making bookings for their trip online.
- 8.** The vast majority (**95.1%**) are satisfied with their Collier stay, with **93.1%** planning a future trip to the area.
- 9.** This year, October visitors average **45.9** years of age (**2016: 46.8 years of age**).

Naples, Marco Island, Everglades: *October 2017 Visitor Profile*

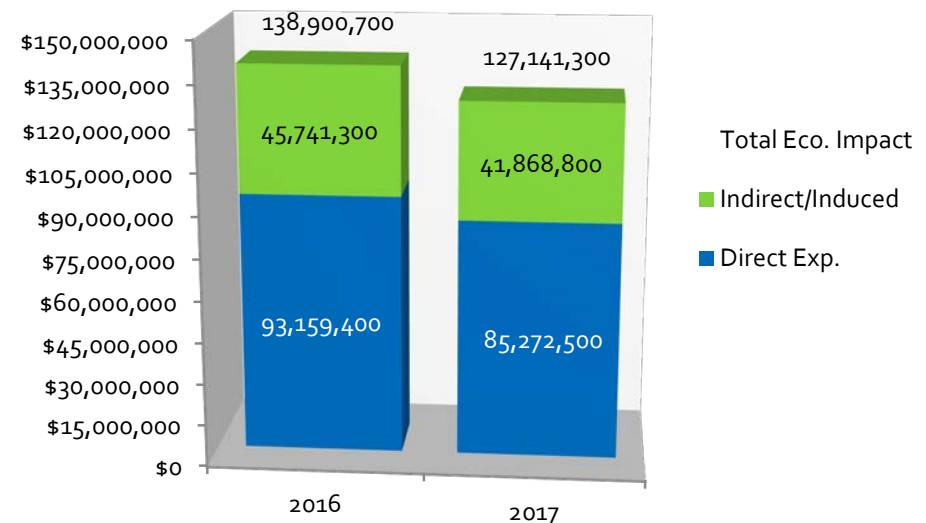
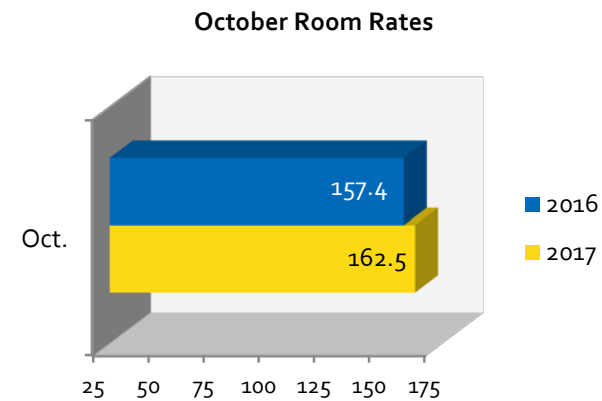
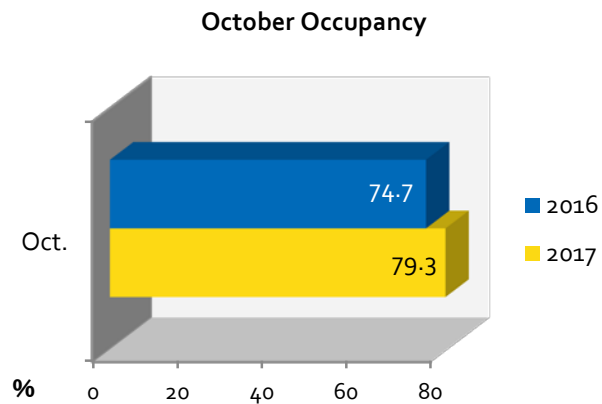


Naples, Marco Island, Everglades Visitor Profile October 2017

H/M/C+ Visitor Statistics	Year to Date (January – October)			October		
	2016	2017	% Δ '16/'17	2016	2017*	% Δ '16/'17
Visitors (#)	1,494,500	1,477,600	-1.1	156,900	139,100	-11.3
Room Nights	2,038,000	1,990,700	-2.3	194,500	181,900	-6.5
Direct Exp. (\$)	\$1,111,095,600	\$1,144,521,100	+3.0	\$93,159,400	\$85,272,500	-8.5
Total Eco. Impact (\$)	\$1,656,643,500	\$1,706,481,000	+3.0	\$138,900,700	\$127,141,300	-8.5

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

October Economic Impact



October

Lodging Statistics	2016	2017**	% Δ '16/'17
Occupancy	74.7%	79.3%	+6.2
Room Rates	\$157.4	\$162.5	+3.2
RevPAR	\$117.6	\$128.9	+9.6

* Hurricane Irma made landfall on September 10, 2017. Available records suggest that approximately 1,600 lodging units were closed in October 2017.

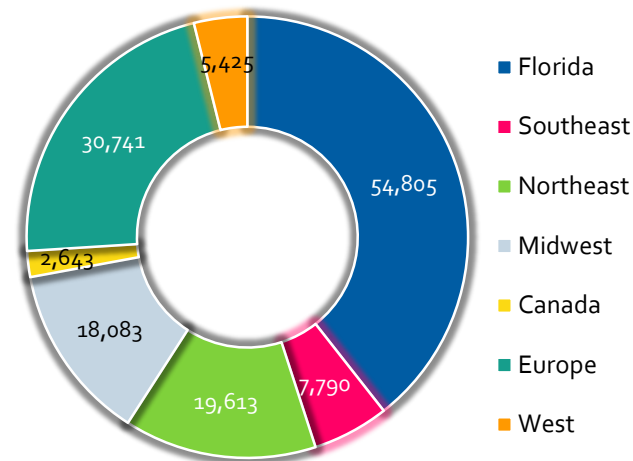
** Based on units available to be rented.

Note: Statistics subject to revision based on data availability.

October 2017 Visitor Origin Markets

Visitor Origins	2016		2017		% Δ '16/'17
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	39.0%	61,191	39.4%	54,805	-10.4
Southeast	4.7	7,374	5.6	7,790	+5.6
Northeast	14.5	22,751	14.1	19,613	-13.8
Midwest	12.3	19,299	13.0	18,083	-6.3
Canada	2.2	3,452	1.9	2,643	-23.4
Europe	22.7	35,616	22.1	30,741	-13.7
West	4.6	7,217	3.9	5,425	-24.8
Total	100.0	156,900	100.0	139,100	-11.3

October 2017 Visitor Origins



Naples, Marco Island, Everglades Visitor Profile | October 2017

Transportation Mode (Multiple Response)	October 2016	October 2017
Plane	59.0%	56.7%
Rental Car	56.5	54.3
Personal Car	39.5	43.5

Airport Deplaned (Base: Flew)	October 2016	October 2017
Southwest Florida International	57.1%	60.3%
Miami International	27.7	22.3
Orlando International/Sanford	6.9	7.9
Tampa International	4.1	4.7
Ft. Lauderdale International	3.9	4.1

Purpose of Trip (Multiple Response)	October 2016	October 2017
Vacation/Weekend Getaway	76.1%	69.9%
Group Travel	31.9	34.4
Visit with Friends and Relatives	8.6	12.8
Special Event	7.7	8.8

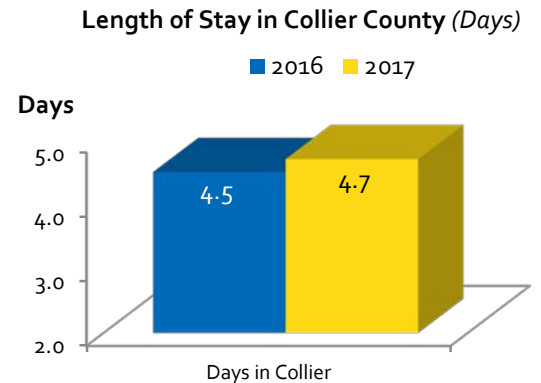
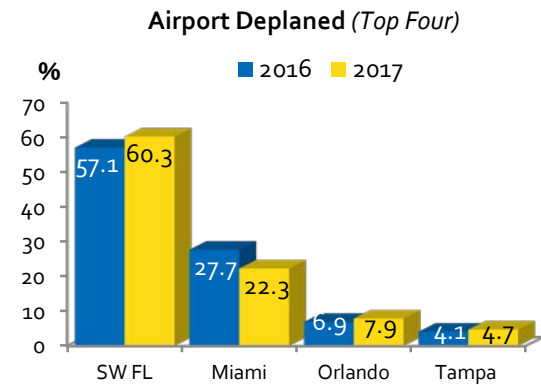
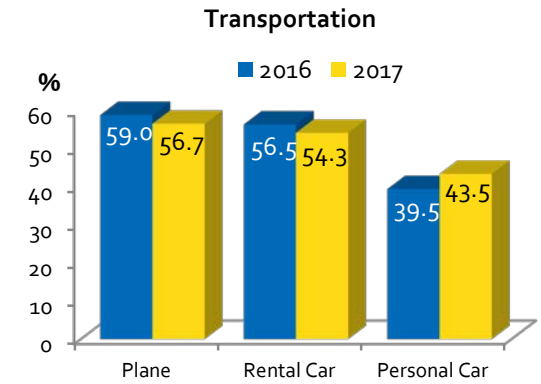
First Visit to (% yes)	October 2016	October 2017
Collier County	42.7%	36.2%
Florida	7.6	5.7

Length of Stay (Days)	October 2016	October 2017
In Collier County	4.5	4.7

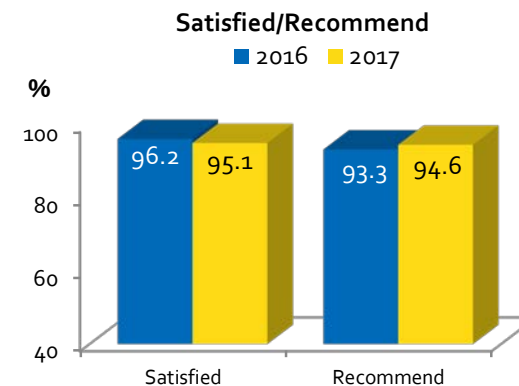
Party Size	October 2016	October 2017
Number of People	2.5	2.6

Party Composition (Multiple Response)	October 2016	October 2017
Couple	61.1%	57.7%
Family	26.4	30.9
Single	7.7	11.0
Group of Friends	10.2	7.1

Did Party Have Lodging Reservations for Stay	October 2016	October 2017
% Yes	93.0%	96.2%

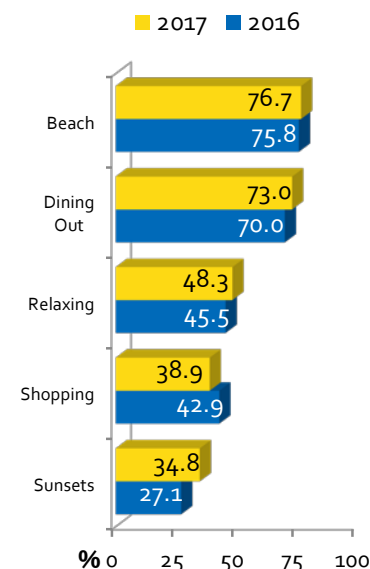


Satisfaction with Collier County	October 2016	October 2017
Very Satisfied	94.9%	93.5%
Satisfied	1.3	1.6
Satisfaction Level (Combined)	96.2%	95.1%



Activities Enjoyed in Area (Multiple Response)	October 2016	October 2017
Beach	75.8%	76.7%
Dining Out	70.0	73.0
Relaxing	45.5	48.3
Shopping	42.9	38.9
Sunsets	27.1	34.8
Pool	35.2	32.0
Swimming	31.0	28.3
Enjoying Nature/Bird Watching/Everglades	27.2	24.3
Sightseeing	26.5	22.7
Sunning	26.9	21.5
Reading	19.2	17.8
Bars/Nightlife	17.4	17.1
Visiting with Friends/Relatives	13.7	16.9
Walking	14.2	16.3
Shelling	12.4	13.9
Art Galleries/Shows/Fairs	16.8	13.8
Canoeing/Kayaking	8.0	10.3
Golfing	10.5	7.0
Fishing	9.5	6.5

Activities Enjoyed in Area (Top Five)

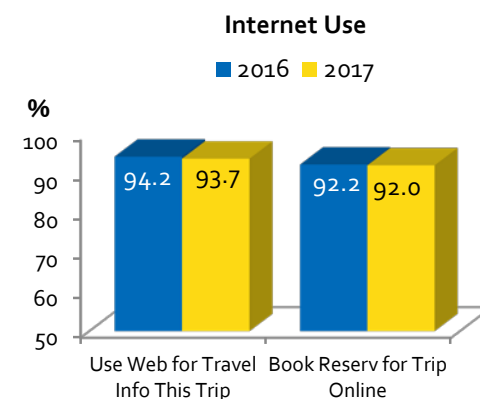
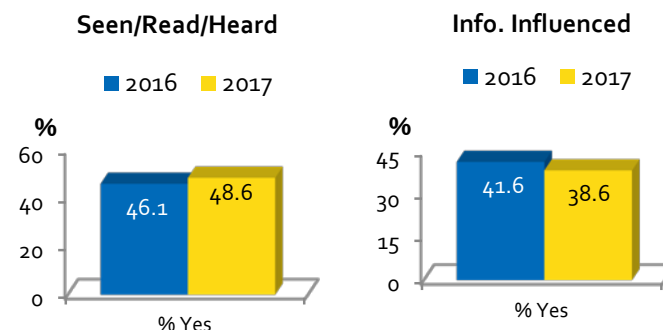
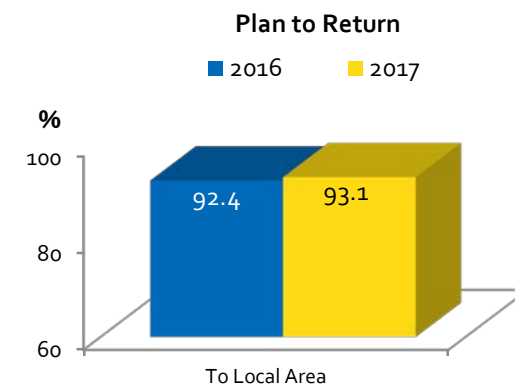


Expense Relative to Expectations	October 2016	October 2017
More Expensive	15.8%	12.6%
Less Expensive	1.9	6.2
As Expected	76.9	79.0

Demographics	October 2016	October 2017
Average Age Head of Household (Years)	46.8	45.9
Median Annual Household Income	\$152,101	\$157,336

Naples, Marco Island, Everglades Visitor Profile | October 2017

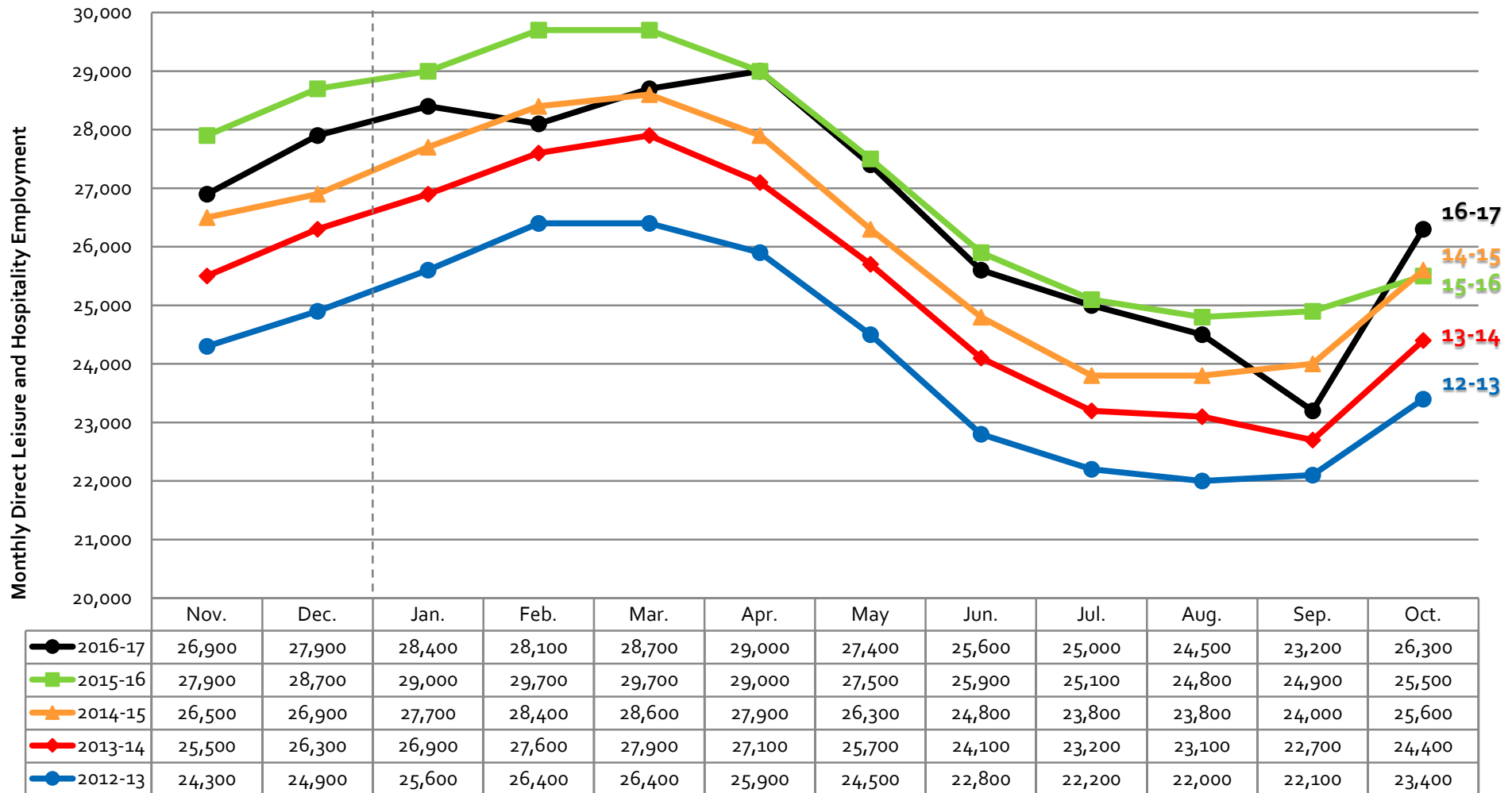
Recommend Collier to Friends/Relatives	October 2016	October 2017
% Yes	93.3%	94.6%
Plan to Return (% Yes)	October 2016	October 2017
To Local Area	92.4%	93.1%
Collier Base Budget	October 2016	October 2017
Total	\$1,484.37	\$1,593.87
Per Person/Stay	593.75	613.03
Per Person/Day	131.94	130.43
Area Information Seen/Read/Heard	October 2016	October 2017
% Yes	46.1%	48.6%
Directly Influenced by Information (Base: Seen/Read/Heard Area Information)	October 2016	October 2017
% Yes	41.6%	38.6%
Why Chose the Area (Multiple Response)	October 2016	October 2017
Beach Area	54.6%	57.0%
Relaxing	45.1	47.1
Quiet/Peaceful/Laid Back	42.7	46.0
Previous Experience	33.2	41.1
Weather	43.8	34.5
Business/Meeting/Conference	27.7	32.1
Quality of Accommodations	32.8	32.0
Not Crowded	27.6	25.7
Appealing Brochures/Websites	35.8	25.0
Recommendation	25.6	22.5
Restaurants	21.5	19.6
Never Been	25.8	17.2
Outdoor Recreation/Nature	27.3	16.5
Visiting with Family/Friends	n/a	10.6
Internet Use	October 2016	October 2017
Use Internet to Obtain Travel Info for This Trip (% Yes)	94.2%	93.7%
Book Reservations for Trip Online (%Yes)	92.2	92.0



Industry Data: *2012-2017*



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

