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Naples, Marco Island, Everglades Convention and Visitors Bureau April 2018 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

May 2018

Naples, Marco Island, Everglades: April 2018 Summary

Executive Summary: April 2018

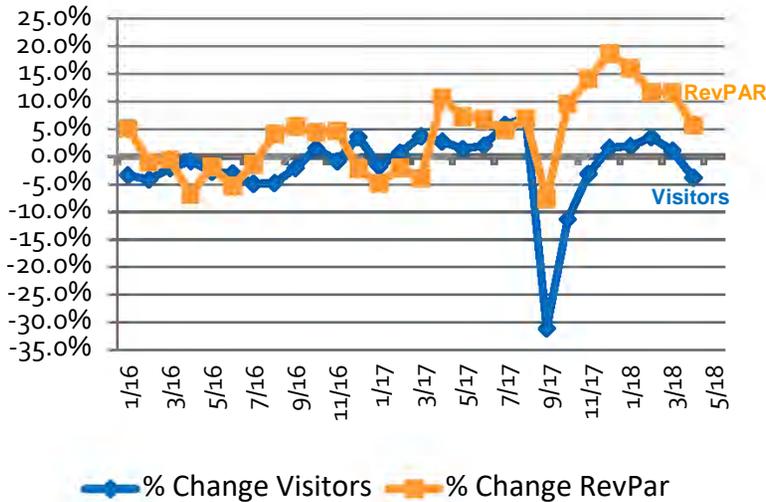
- This April, some **137,100** visitors stayed in Collier's commercial lodgings (-3.8%)*. Their visits contributed an estimated **\$213,637,300** of economic impact to the County (-2.5%). Key performance metrics are as follows:

<u>April</u>	<u>2017</u>	<u>2018**</u>	<u>% Δ</u>
Occupancy	84.3%	82.5%	-2.1%
ADR	\$283.8	\$306.4	+8.0%
RevPAR	\$239.2	\$252.8	+5.7%

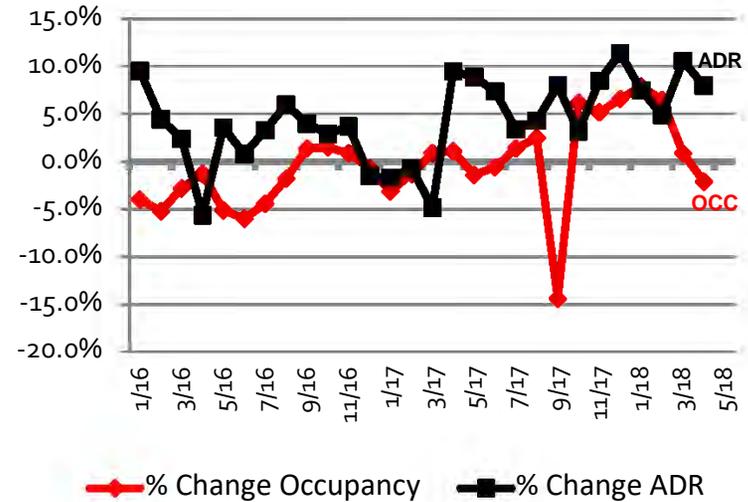
* As of April 2018, approximately 650 lodging units remain closed due to the impact of Hurricane Irma and restorations.

** Based on units available to be rented.

Key Collier Visitation Metrics (%Δ)



Key Collier Visitation Metrics (%Δ)



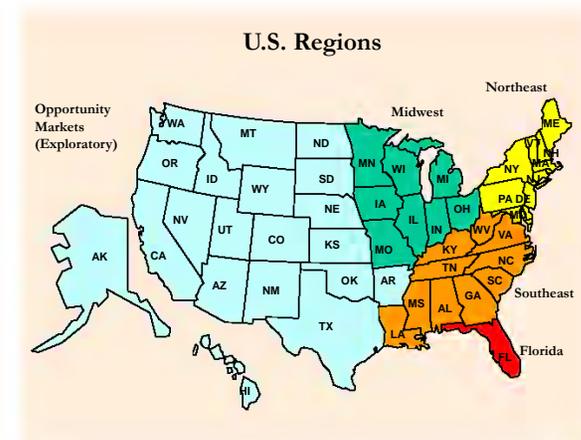
Naples, Marco Island, Everglades: April 2018 Summary

2. Compared to last April, nearly two-thirds (61.0%) of Collier lodging managers report their three month forward reservations levels as “up.”

% of Properties (April)		
<u>Reporting Reservations:</u>	<u>2017</u>	<u>2018</u>
Up	41.7%	61.0%
Same	48.9	30.4
Down	9.4	8.7

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

<u>April Visitation</u>	<u>2018</u> <u>Visitor #</u>	<u>Δ</u>
Florida	35,098	-14.8%
Southeast	8,226	+3.1
Northeast	32,630	-0.9
Midwest	27,557	-1.3
Canada	3,564	-24.2
Europe	23,444	+4.1
Other	6,581	-24.8
Total	137,100	-3.8%



4. This April, seven out of ten of the destination’s visitor parties flew (2017: 73.6%; 2018: 72.5%). A majority of these (62.4%) deplaned at RSW, with Miami capturing some 17.9% of deplanements.
5. This April, visitor party size averaged 2.8 travelers who stayed for 3.6 nights in the Naples, Marco Island, Everglades area (2017: 2.8 people; 3.7 nights).

Naples, Marco Island, Everglades: April 2018 Summary

- 6.** Some **47.1%** of Collier's April visitors are in the destination for the first time.
- 7.** Fully **95.0%** consult the web for trip information, with some **77.2%** making bookings for their trip online.
- 8.** The vast majority (**94.2%**) are satisfied with their Collier stay, with **88.9%** planning a future trip to the area.
- 9.** The typical April visitor is **48.8 years of age (2017: 48.3 years)**.

Naples, Marco Island, Everglades: *April 2018 Visitor Profile*

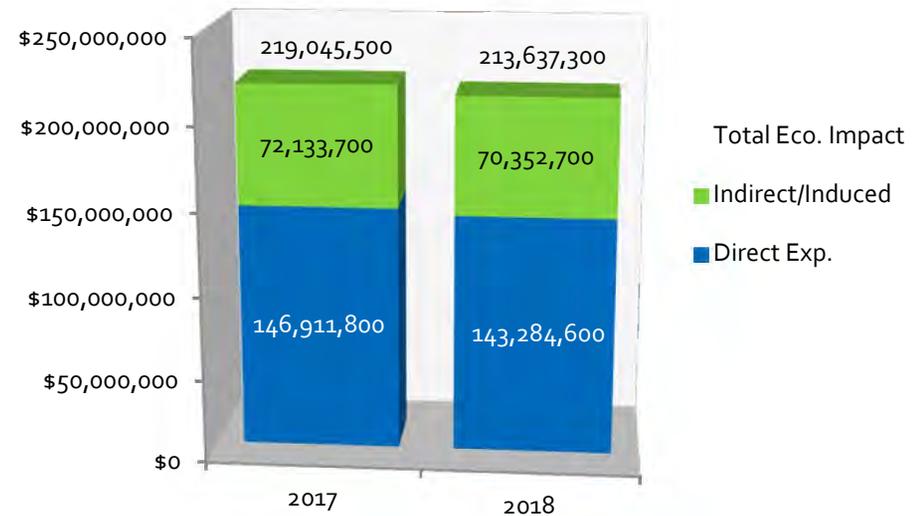
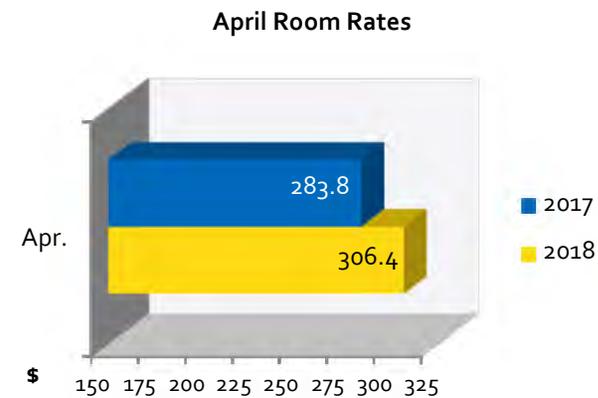
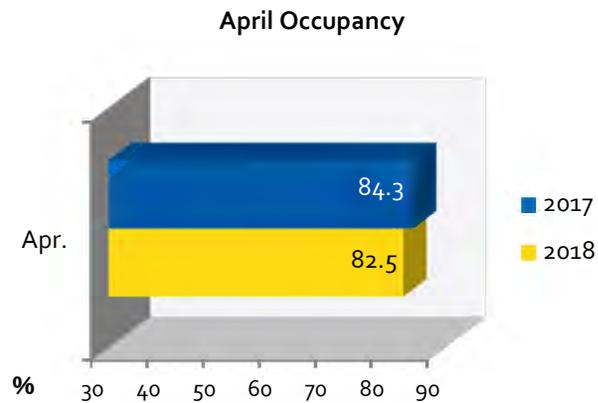


Naples, Marco Island, Everglades Visitor Profile | April 2018

H/M/C+ Visitor Statistics	Year to Date (January – April)			April		% Δ '17/'18
	2017	2018	% Δ '17/'18	2017	2018*	
Visitors (#)	750,500	758,100	+1.0	142,500	137,100	-3.8
Room Nights	974,200	957,100	-1.8	222,800	212,500	-4.6
Direct Exp. (\$)	\$657,429,200	\$683,849,800	+4.0	\$146,911,800	\$143,284,600	-2.5
Total Eco. Impact (\$)	\$980,227,000	\$1,019,620,100	+4.0	\$219,045,500	\$213,637,300	-2.5

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

April Economic Impact



April

Lodging Statistics	2017	2018**	% Δ '17/'18
Occupancy	84.3%	82.5%	-2.1
Room Rates	\$283.8	\$306.4	+8.0
RevPAR	\$239.2	\$252.8	+5.7

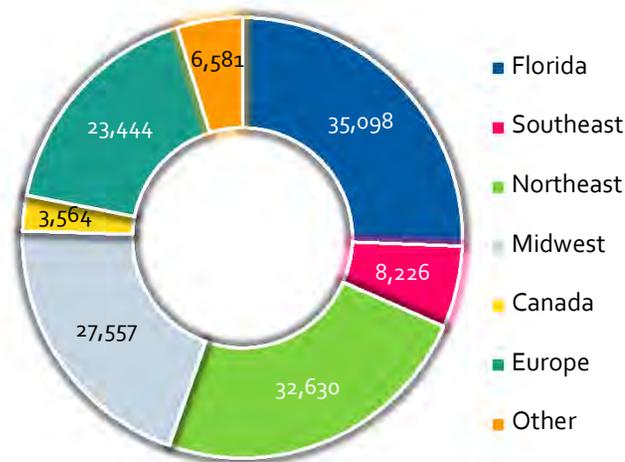
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April 2018 Visitor Origin Markets

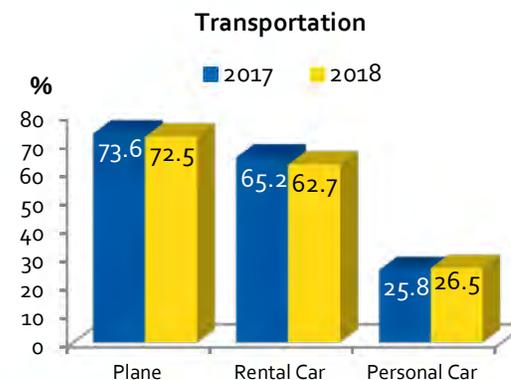
Visitor Origins	2017		2018		% Δ '17/'18
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	28.9%	41,183	25.6%	35,098	-14.8
Southeast	5.6	7,980	6.0	8,226	+3.1
Northeast	23.1	32,918	23.8	32,630	-0.9
Midwest	19.6	27,930	20.1	27,557	-1.3
Canada	3.3	4,702	2.6	3,564	-24.2
Europe	15.8	22,515	17.1	23,444	+4.1
Other	3.7	5,272	4.8	6,581	+24.8
Total	100.0	142,500	100.0	137,100	-3.8

April 2018 Visitor Origins

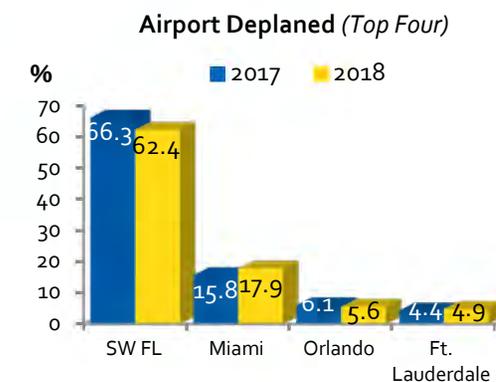


Naples, Marco Island, Everglades Visitor Profile | April 2018

Transportation Mode (Multiple Response)	April 2017	April 2018	
Plane	73.6%	72.5%	↓
Rental Car	65.2	62.7	↓
Personal Car	25.8	26.5	↑

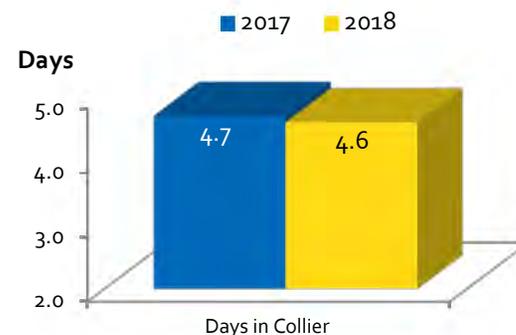


Airport Deplaned (Base: Flew)	April 2017	April 2018	
Southwest Florida International	66.3%	62.4%	↓
Miami International	15.8	17.9	↑
Orlando International/Sanford	6.1	5.6	↓
Ft. Lauderdale International	4.4	4.9	↑
Tampa International	2.7	2.9	↑



Purpose of Trip (Multiple Response)	April 2017	April 2018	
Vacation/Weekend Getaway	88.3%	85.5%	↓
Group Travel	21.6	25.3	↑
Visit with Friends and Relatives	16.4	14.3	↓

Length of Stay in Collier County (Days)



First Visit to (% yes)	April 2017	April 2018	
Collier County	46.2%	47.1%	↑
Florida	5.1	5.7	↑

Length of Stay (Days)	April 2017	April 2018	
In Collier County	4.7	4.6	↓

Party Size	April 2017	April 2018	
Number of People	2.8	2.8	—

Naples, Marco Island, Everglades Visitor Profile | April 2018

Party Composition (Multiple Response)	April 2017	April 2018	
Couple	59.2%	57.8%	↓
Family	30.8	31.3	↑
Single	11.2	13.5	↑
Group of Friends	5.1	4.5	↓

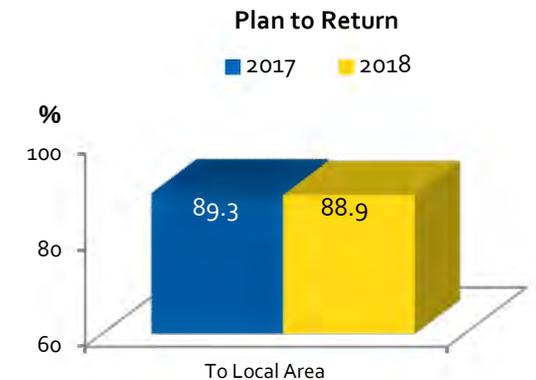
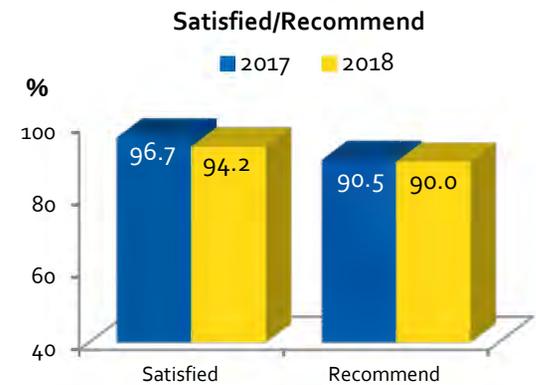
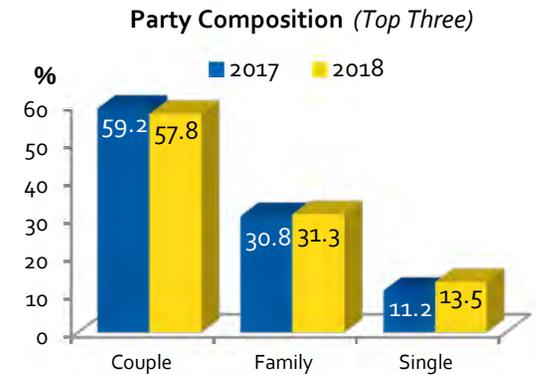
Did Party Have Lodging Reservations for Stay	April 2017	April 2018	
% Yes	95.7%	94.0%	↓

Expense Relative to Expectations	April 2017	April 2018	
More Expensive	21.2%	19.6%	↓
Less Expensive	2.9	3.7	↑
As Expected	75.1	75.9	↑

Satisfaction with Collier County	April 2017	April 2018	
Very Satisfied	87.4%	83.1%	↓
Satisfied	9.3	11.1	↑
Satisfaction Level (Combined)	96.7%	94.2%	↓

Recommend Collier to Friends/Relatives	April 2017	April 2018	
% Yes	90.5%	90.0%	↓

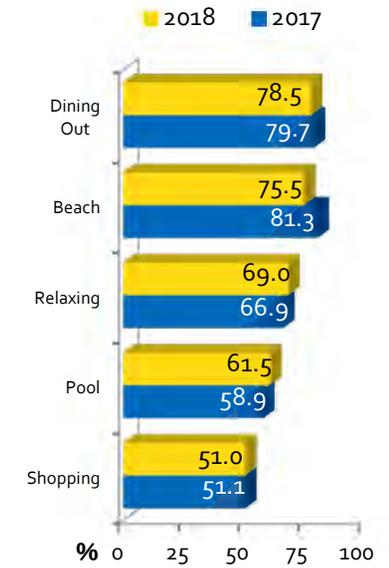
Plan to Return (% Yes)	April 2017	April 2018	
To Local Area	89.3%	88.9%	↓



Naples, Marco Island, Everglades Visitor Profile | April 2018

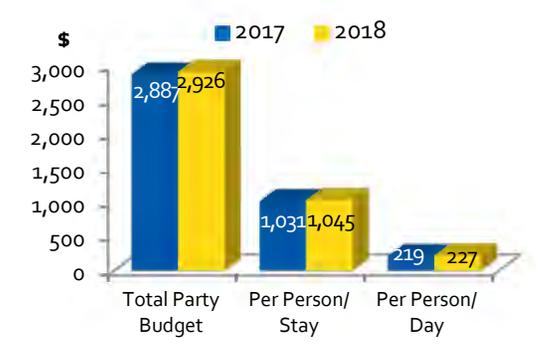
Activities Enjoyed in Area (Multiple Response)	April 2017	April 2018	
Dining Out	79.7%	78.5%	↓
Beach	81.3	75.5	↓
Relaxing	66.9	69.0	↑
Pool	58.9	61.5	↑
Shopping	51.1	51.0	↓
Swimming	41.6	40.1	↓
Sunsets	31.6	32.7	↑
Enjoying Nature/Bird Watching/Everglades	27.8	30.7	↑
Sunning	23.0	24.2	↑
Bars/Nightlife	19.7	23.5	↑
Visiting with Friends/Relatives	24.5	23.1	↓
Reading	19.5	20.5	↑
Sightseeing	20.1	19.9	↓
Walking	18.2	18.5	↑
Art Galleries/Shows/Fairs	16.5	13.7	↓
Golfing	9.5	6.1	↓

Activities Enjoyed in Area (Top Five)



Demographics	April 2017	April 2018	
Average Age Head of Household (Years)	48.3	48.8	↑
Median Annual Household Income	\$159,275	\$161,745	↑

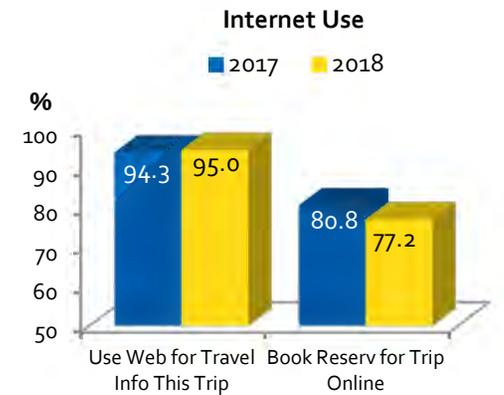
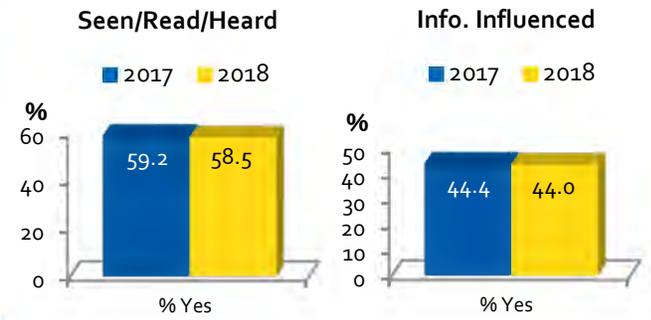
Collier Base Budgets



Collier Base Budget	April 2017	April 2018	
Total	\$2,886.70	\$2,926.31	↑
Per Person/Stay	1,030.96	1,045.11	↑
Per Person/Day	219.35	227.20	↑

Naples, Marco Island, Everglades Visitor Profile | April 2018

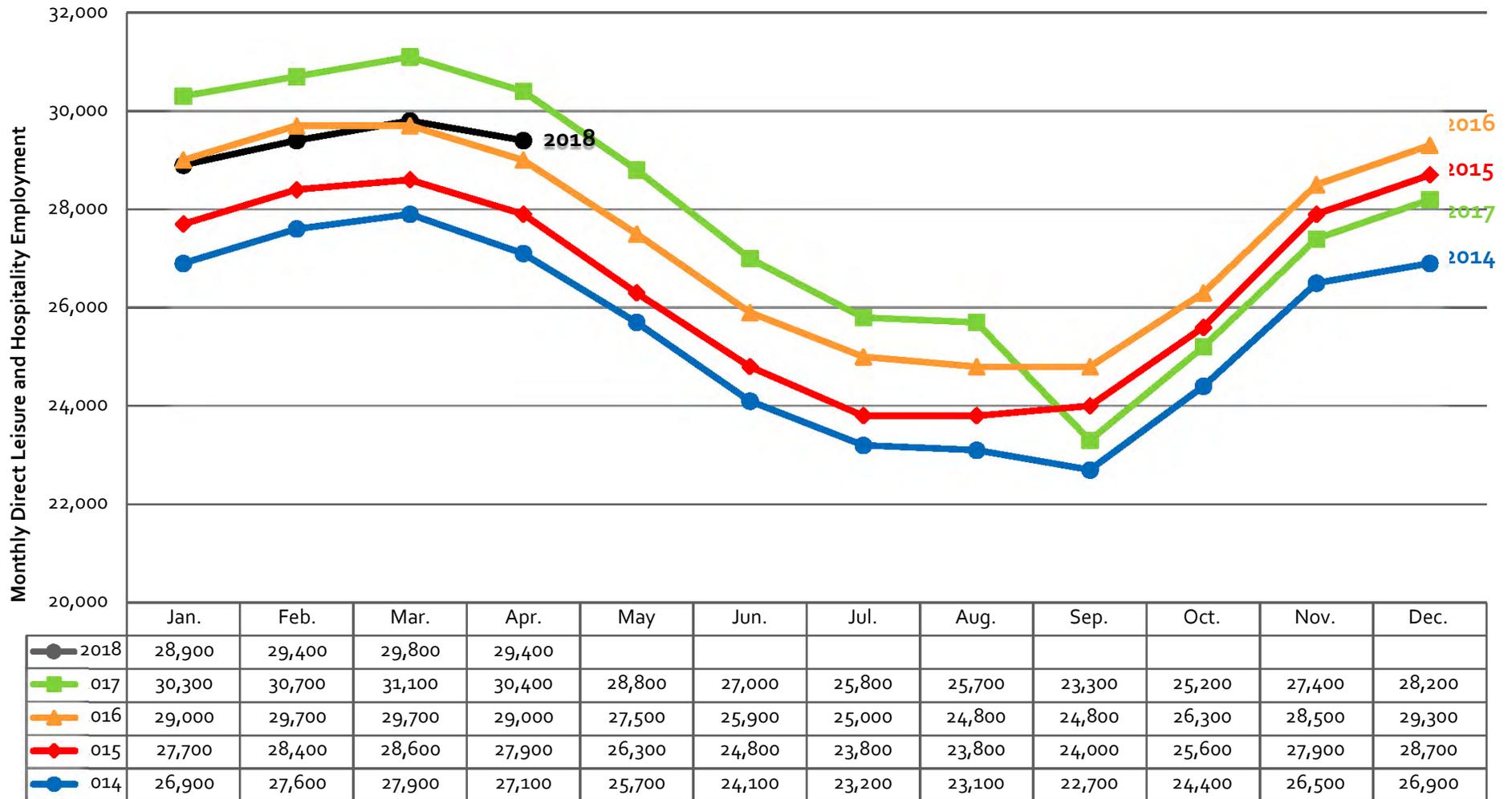
Area Information Seen/Read/Heard	April 2017	April 2018	
% Yes	59.2%	58.5%	↓
Directly Influenced by Information (Base: Seen/Read/Heard Area Information)			
	April 2017	April 2018	
% Yes	44.4%	44.0%	↓
Why Chose the Area (Multiple Response)			
	April 2017	April 2018	
Beach Area	56.0%	53.7%	↓
Weather	50.4	52.9	↑
Restaurants	41.2	40.9	↓
Relaxing	41.1	39.1	↓
Quiet/Peaceful/Laid Back	35.1	35.9	↑
Previous Experience	35.7	34.2	↓
Outdoor Recreation/Nature	27.7	29.1	↑
Quality of Accommodations	31.2	27.5	↓
Never Been	26.3	25.8	↓
Appealing Brochures/Websites	26.9	25.2	↓
Recommendation	26.5	23.8	↓
Business/Meeting/Conference	20.8	22.2	↑
Not Crowded	20.6	19.6	↓
Internet Use			
	April 2017	April 2018	
Use Internet to Obtain Travel Info for This Trip (% Yes)	94.3%	95.0%	↑
Book Reservations for Trip Online (%Yes)	80.8	77.2	↓



Industry Data: *2014-2018*

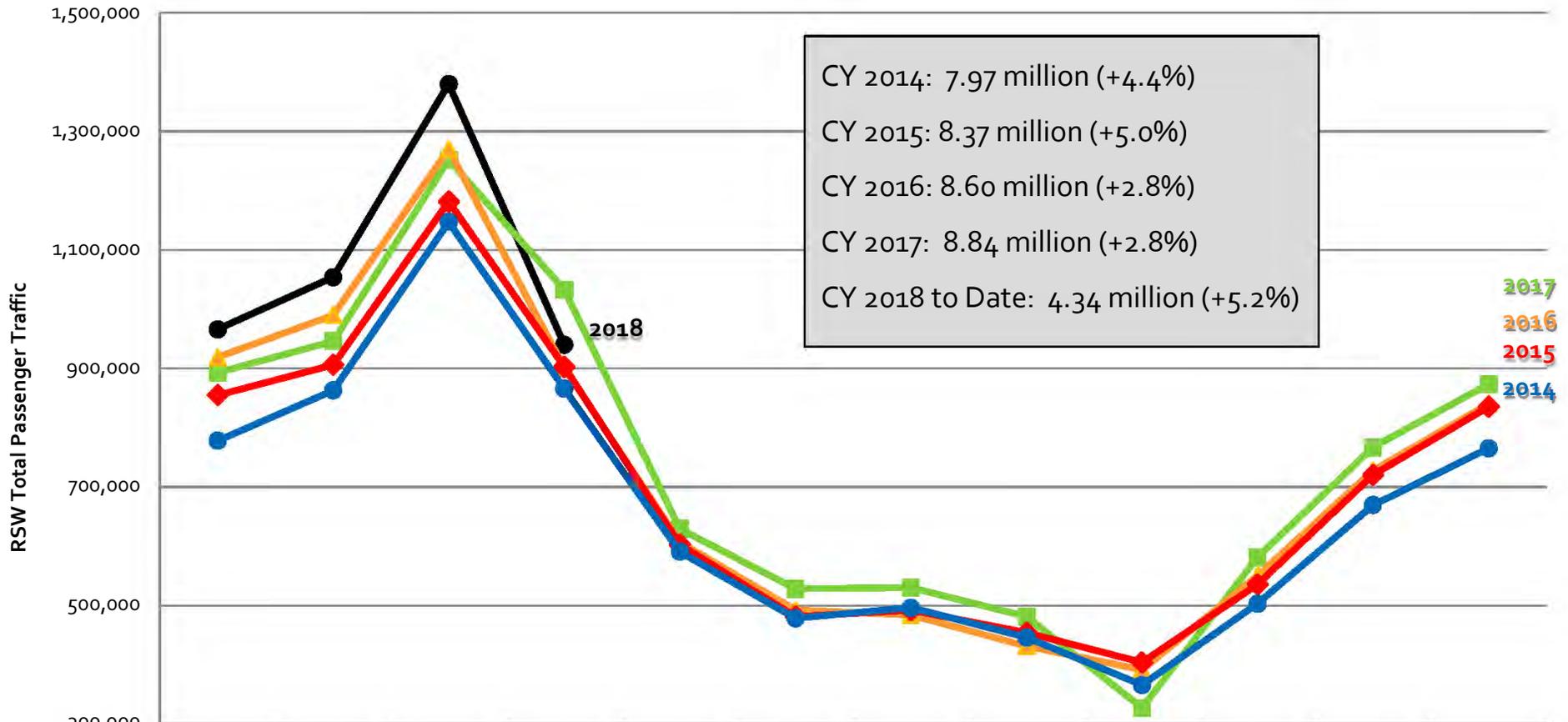


Collier Direct Leisure and Hospitality Employment (Calendar Year) *



* Source: Florida Department of Economic Opportunity/U.S. Department of Labor. Statistics updated for July 2016 through February 2018 as of April 2018 reporting.

Southwest Florida International Airport (RSW) Passenger Traffic



CY 2014: 7.97 million (+4.4%)
 CY 2015: 8.37 million (+5.0%)
 CY 2016: 8.60 million (+2.8%)
 CY 2017: 8.84 million (+2.8%)
 CY 2018 to Date: 4.34 million (+5.2%)

	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
● 2018	965,981	1,053,817	1,379,728	939,957								
■ 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
● 2014	778,163	862,899	1,147,059	865,554	591,116	478,692	496,472	446,402	366,038	503,243	669,567	765,288