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Naples, Marco Island, Everglades Convention and Visitors Bureau December 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

January 2018

Naples, Marco Island, Everglades: December 2017 Summary

Executive Summary: December 2017

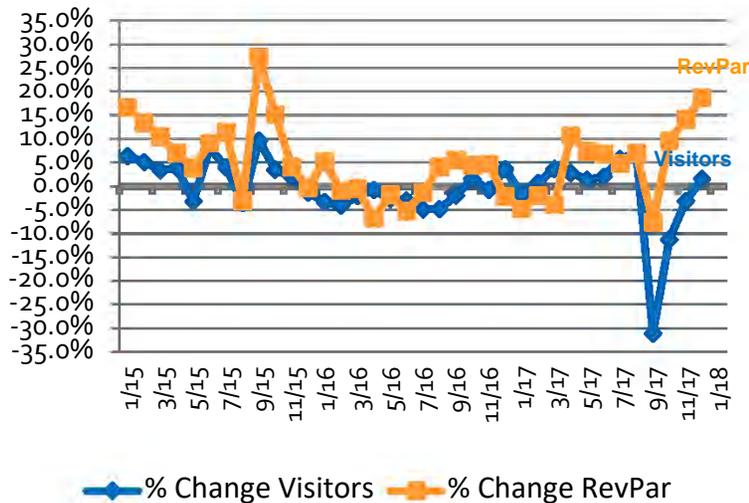
- This December, some **157,800** visitors stayed in Collier's commercial lodgings (**+1.6%**)*. Their visits contributed an estimated **\$199,394,900** of economic impact to the County (**+7.7%**). Key performance metrics are as follows:

<u>December</u>	<u>2016</u>	<u>2017**</u>	<u>% Δ</u>
Occupancy	74.4%	79.3%	+6.6%
ADR	\$218.4	\$243.2	+11.4%
RevPAR	\$162.5	\$192.9	+18.7%

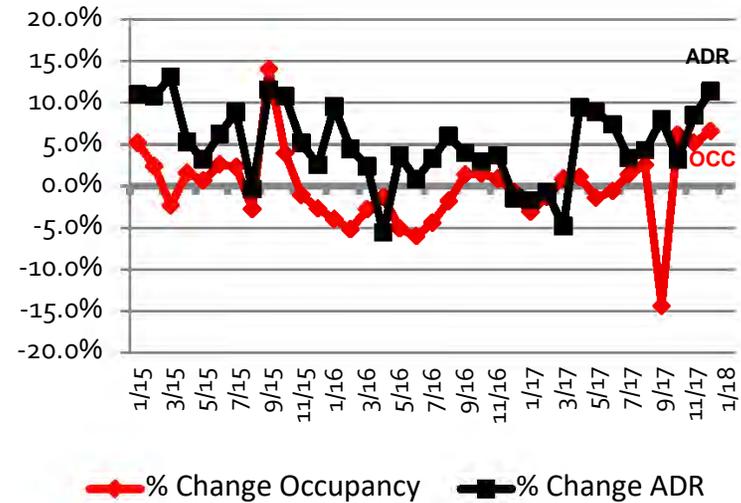
* Available records suggest that approximately 800 lodging units were closed in December 2017 due to Hurricane Irma.

** Based on units available to be rented.

Key Collier Visitation Metrics (%Δ)



Key Collier Visitation Metrics (%Δ)



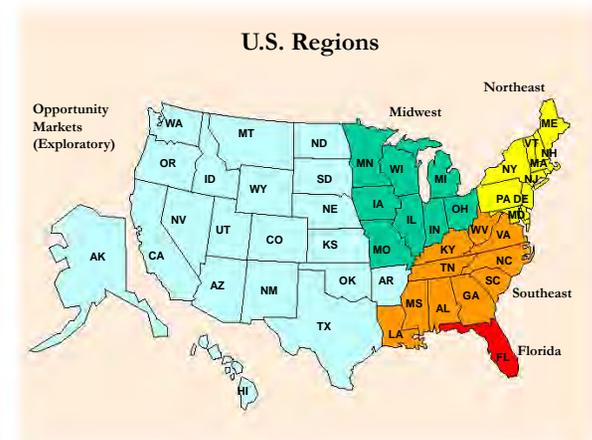
Naples, Marco Island, Everglades: December 2017 Summary

2. Compared to last December, half (**51.5%**) of Collier lodging managers report their three month forward reservations levels as “up.”

% of Properties (December)		
<u>Reporting Reservations:</u>	<u>2016</u>	<u>2017</u>
Up	12.9%	51.5%
Same	32.3	36.4
Down	54.8	12.1

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

<u>December Visitation</u>	<u>2017</u> <u>Visitor #</u>	<u>Δ</u>
Florida	64,067	-0.1%
Southeast	10,730	-1.3
Northeast	17,673	+0.7
Midwest	24,459	+9.4
Canada	5,050	+8.4
Europe	27,142	+1.0
Other	8,679	-2.0
Total	157,800	+1.6%



4. This December, six out of every ten of the destination’s visitor parties flew (**2016: 58.3%; 2017: 62.6%**). A majority of these (**64.7%**) deplaned at RSW, with Miami capturing some **21.9%** of deplanements.
5. This December, visitor party size averaged **2.7** travelers who stayed for **3.2** nights in the Naples, Marco Island, Everglades area (**2016: 2.6 people; 3.1 nights**).

Naples, Marco Island, Everglades: December 2017 Summary

- 6.** Some **35.1%** of Collier's December visitors are in the destination for the first time.
- 7.** Fully **93.3%** consult the web for trip information, with some **75.7%** making bookings for their trip online.
- 8.** The vast majority (**96.3%**) are satisfied with their Collier stay, with **92.6%** planning a future trip to the area.
- 9.** The typical December visitor is **49.5 years of age (2016: 48.7 years)**.

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

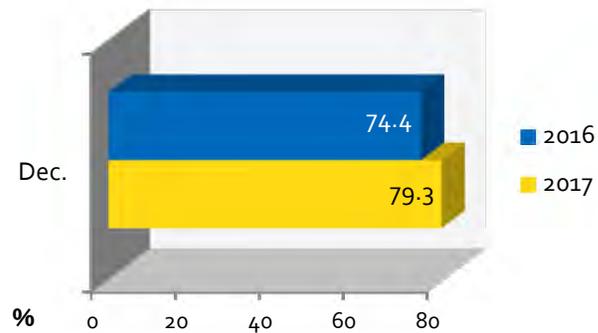


Naples, Marco Island, Everglades Visitor Profile | December 2017

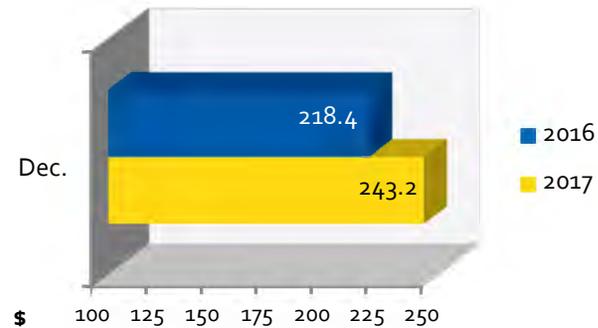
H/M/C+ Visitor Statistics	Calendar Year (January – December)			December		
	2016	2017	% Δ '16/'17	2016	2017*	% Δ '16/'17
Visitors (#)	1,793,700	1,774,800	-1.1	155,300	157,800	+1.6
Room Nights	2,429,700	2,364,300	-2.7	203,000	199,300	-1.8
Direct Exp. (\$)	\$1,328,627,700	\$1,373,918,000	+3.4	\$124,185,600	\$133,732,300	+7.7
Total Eco. Impact (\$)	\$1,980,983,900	\$2,048,511,800	+3.4	\$185,160,700	\$199,394,900	+7.7

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

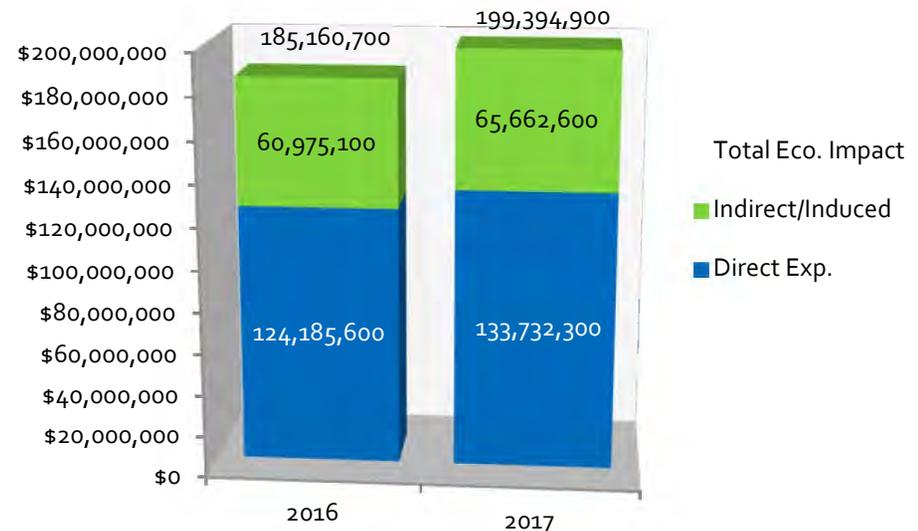
December Occupancy



December Room Rates



December Economic Impact



December

Lodging Statistics	2016	2017**	% Δ '16/'17
Occupancy	74.4%	79.3%	+6.6
Room Rates	\$218.4	\$243.2	+11.4
RevPAR	\$162.5	\$192.9	+18.7

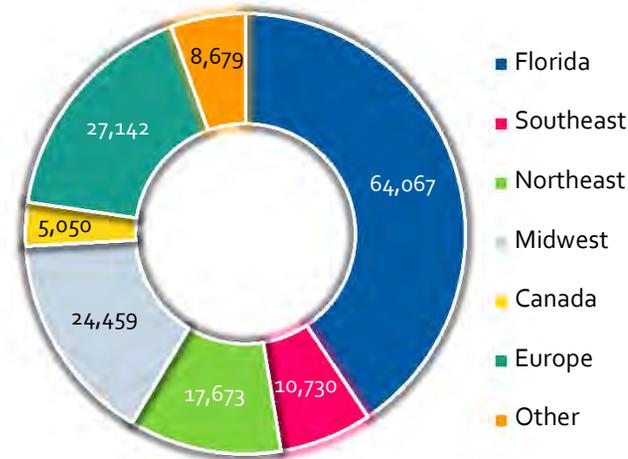
* Available records suggest that approximately 800 units were closed in December 2017 due to the impact of Hurricane Irma and ongoing restorations.

** Based on units available to be rented.

December 2017 Visitor Origin Markets

Visitor Origins	2016		2017		% Δ '16/'17
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	41.3%	64,139	40.6%	64,067	-0.1
Southeast	7.0	10,871	6.8	10,730	-1.3
Northeast	11.3	17,549	11.2	17,673	+0.7
Midwest	14.4	22,363	15.5	24,459	+9.4
Canada	3.0	4,659	3.2	5,050	+8.4
Europe	17.3	26,867	17.2	27,142	+1.0
Other	5.7	8,852	5.5	8,679	-2.0
Total	100.0	155,300	100.0	157,800	+1.6

December 2017 Visitor Origins



Naples, Marco Island, Everglades Visitor Profile | December 2017

Transportation Mode (Multiple Response)	December 2016	December 2017
Plane	58.3%	62.6%
Rental Car	57.6	58.2
Personal Car	40.6	37.2

Airport Deplaned (Base: Flew)	December 2016	December 2017
Southwest Florida International	62.7%	64.7%
Miami International	20.2	21.9
Orlando International/Sanford	6.8	5.9
Ft. Lauderdale International	5.5	4.6

Purpose of Trip (Multiple Response)	December 2016	December 2017
Vacation/Weekend Getaway	80.0%	80.7%
Group Travel	27.3	29.0
Visit with Friends and Relatives	16.7	16.2
Special Event	7.2	5.8

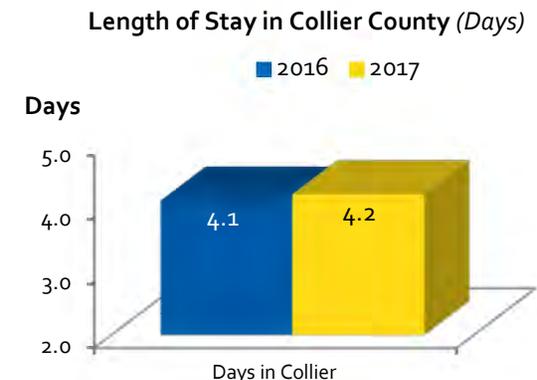
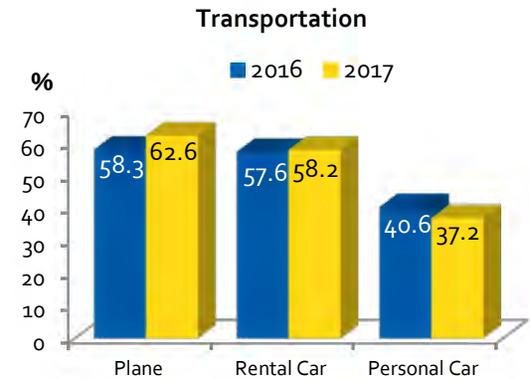
First Visit to (% yes)	December 2016	December 2017
Collier County	41.0%	35.1%
Florida	6.2	4.3

Length of Stay (Days)	December 2016	December 2017
In Collier County	4.1	4.2

Party Size	December 2016	December 2017
Number of People	2.6	2.7

Party Composition (Multiple Response)	December 2016	December 2017
Couple	51.8%	56.4%
Family	31.3	29.0
Single	12.4	13.0
Business Associates	10.3	11.0
Group of Friends	5.0	3.9

Did Party Have Lodging Reservations for Stay	December 2016	December 2017
% Yes	97.9%	97.5%

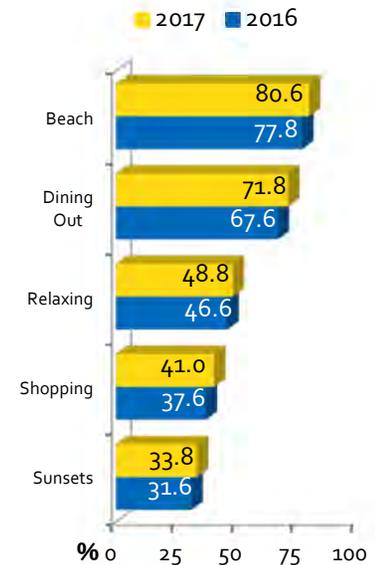


Naples, Marco Island, Everglades Visitor Profile | December 2017

Satisfaction with Collier County	December 2016	December 2017
Very Satisfied	77.8%	80.8%
Satisfied	16.4	15.5
Satisfaction Level (Combined)	94.2%	96.3%
Activities Enjoyed in Area (Multiple Response)	December 2016	December 2017
Beach	77.8%	80.6%
Dining Out	67.6	71.8
Relaxing	46.6	48.8
Shopping	37.6	41.0
Sunsets	31.6	33.8
Pool	29.9	33.3
Walking	23.6	24.0
Art Galleries/Shows/Fairs	17.9	23.5
Sightseeing	26.4	21.9
Visiting with Friends/Relatives	20.3	21.8
Sunning	22.6	20.1
Reading	18.6	18.5
Enjoying Nature/Bird Watching/Everglades	24.9	18.3
Swimming	15.3	13.6
Bars/Nightlife	14.7	12.9
Golfing	12.1	10.8
Expense Relative to Expectations	December 2016	December 2017
More Expensive	24.2%	18.8%
Less Expensive	1.0	8.3
As Expected	61.0	69.0
Demographics	December 2016	December 2017
Average Age Head of Household (Years)	48.7	49.5
Median Annual Household Income	\$158,879	\$162,384
Recommend Collier to Friends/Relatives	December 2016	December 2017
% Yes	95.2%	94.4%

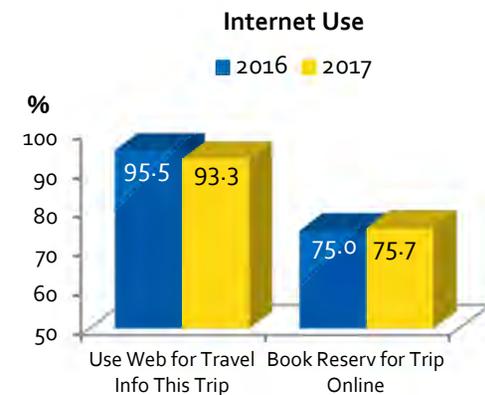
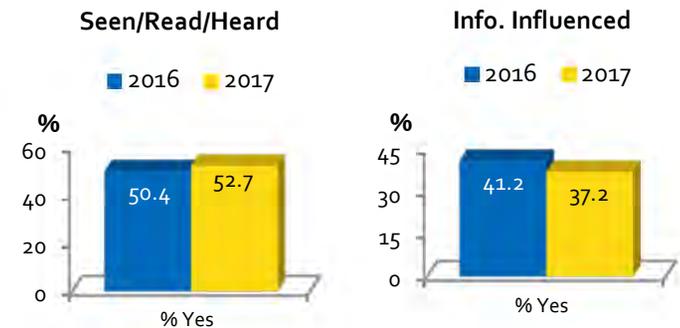


Activities Enjoyed in Area (Top Five)



Naples, Marco Island, Everglades Visitor Profile | December 2017

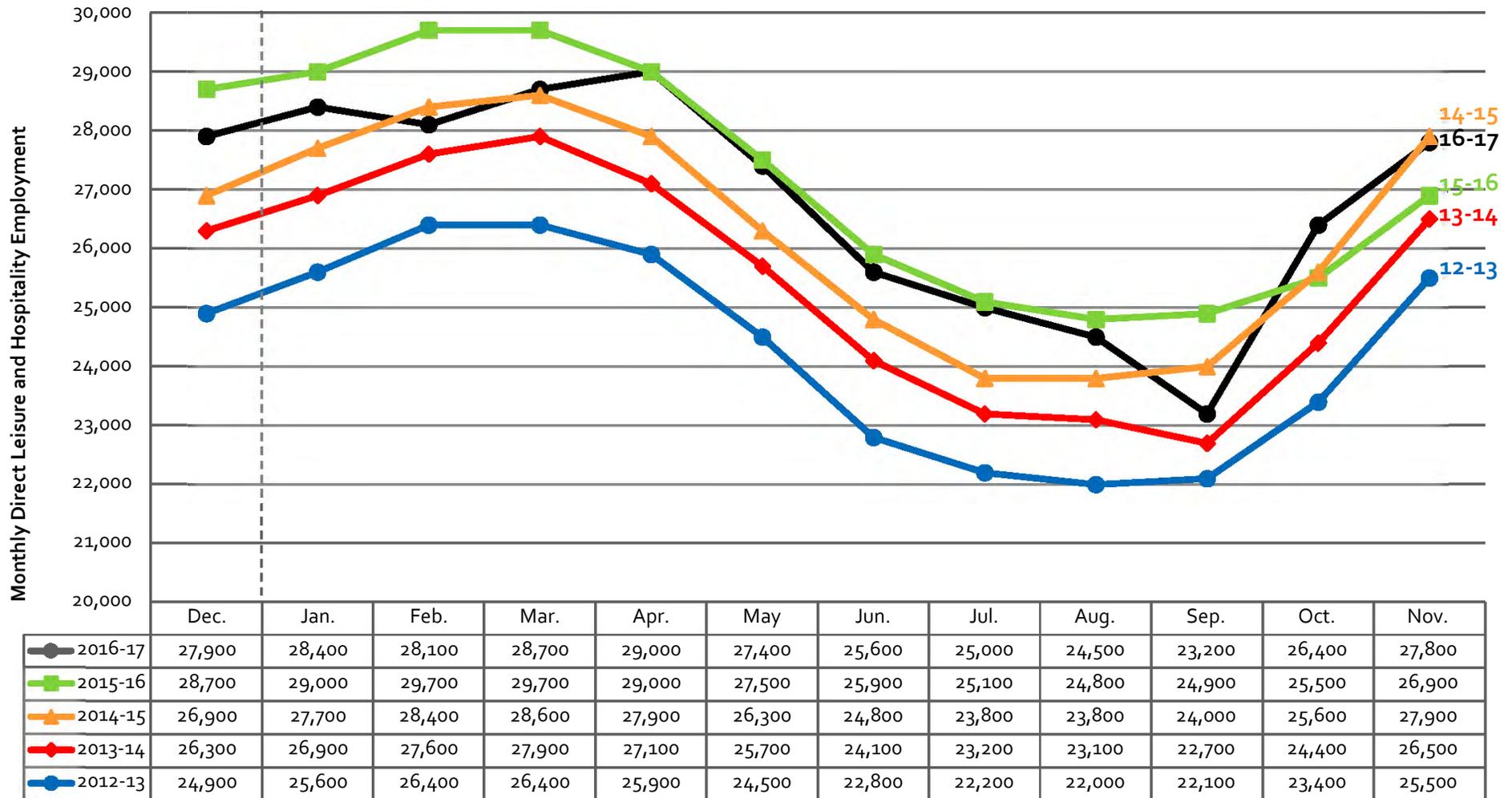
Plan to Return (% Yes)	December 2016	December 2017
To Local Area	90.6%	92.6%
Collier Base Budget	December 2016	December 2017
Total	\$2,079.09	\$2,288.19
Per Person/Stay	799.65	847.48
Per Person/Day	195.04	201.78
Area Information Seen/Read/Heard	December 2016	December 2017
% Yes	50.4%	52.7%
Directly Influenced by Information (Base: Seen/Read/Heard Area Information)	December 2016	December 2017
% Yes	41.2%	37.2%
Why Chose the Area (Multiple Response)	December 2016	December 2017
Beach Area	55.0%	59.5%
Weather	53.6	51.4
Relaxing	38.6	43.5
Previous Experience	33.8	38.2
Quiet/Peaceful/Laid Back	30.8	35.4
Quality of Accommodations	33.3	32.4
Restaurants	28.0	32.4
Outdoor Recreation/Nature	38.0	31.1
Never Been	31.8	29.7
Business/Meeting/Conference	26.0	27.6
Recommendation	26.7	25.4
Not Crowded	21.4	24.3
Appealing Brochures/Websites	26.5	23.6
Internet Use	December 2016	December 2017
Use Internet to Obtain Travel Info for This Trip (% Yes)	95.5%	93.3%
Book Reservations for Trip Online (%Yes)	75.0	75.7



Industry Data: *2012-2017*

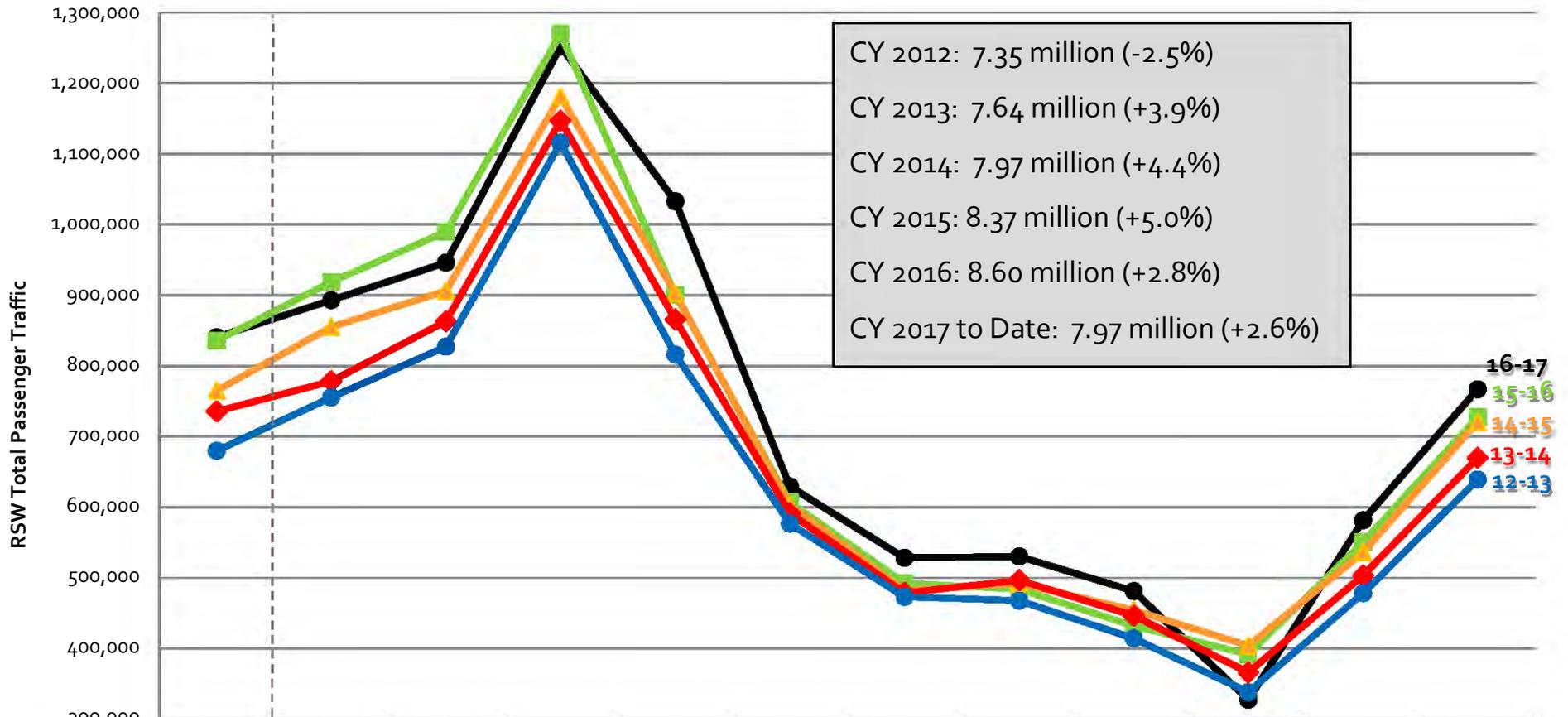


Collier Direct Leisure and Hospitality Employment (Calendar Year) *



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

Southwest Florida International Airport (RSW) Passenger Traffic



	Dec.	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.
● 2016-17	840,501	892,905	946,079	1,252,124	1,032,783	629,321	528,383	530,428	481,185	327,466	581,317	767,064
■ 2015-16	835,359	918,929	989,845	1,269,961	900,594	606,833	492,413	484,074	431,729	391,844	550,316	727,634
▲ 2014-15	765,288	854,953	906,039	1,181,382	902,669	602,891	481,512	492,114	454,360	404,045	535,921	720,556
◆ 2013-14	735,739	778,163	862,899	1,147,059	865,554	591,116	478,692	496,472	446,402	366,038	503,243	669,567
● 2012-13	679,672	755,232	827,147	1,115,937	815,978	576,713	473,208	467,946	414,303	338,175	478,376	639,047