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Naples, Marco Island, Everglades Convention and Visitors Bureau July 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.

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August 2018

Naples, Marco Island, Everglades: July 2018 Summary

Executive Summary: July 2018

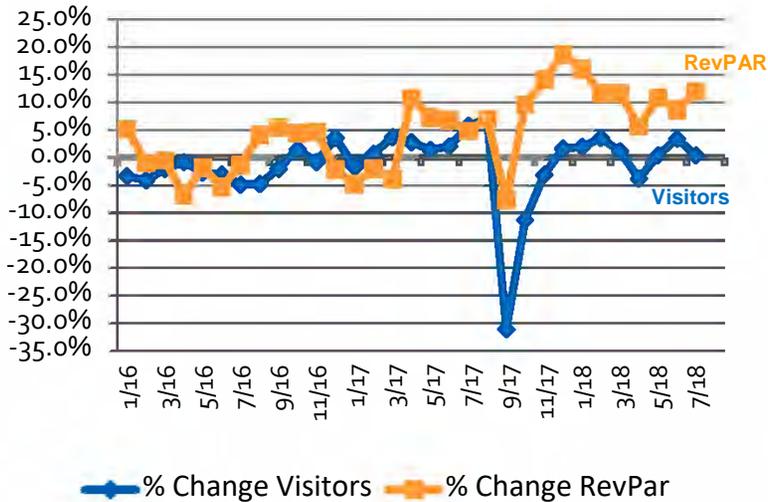
- This July, some **135,700** visitors stayed in Collier's commercial lodgings (**+0.4%**)*. Their visits contributed an estimated **\$135,981,100** of economic impact to the County (**+5.0%**). Key performance metrics are as follows:

<u>July</u>	<u>2017</u>	<u>2018**</u>	<u>% Δ</u>
Occupancy	72.6%	76.2%	+5.0%
ADR	\$154.1	\$164.4	+6.7%
RevPAR	\$111.9	\$125.3	+12.0%

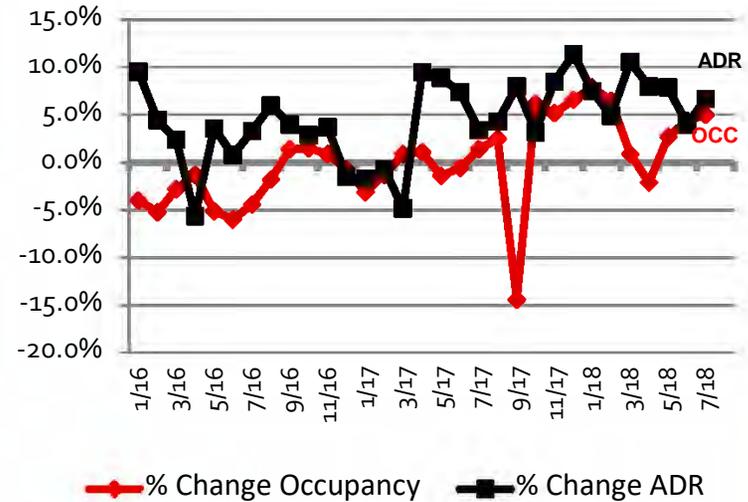
* As of July 2018, approximately 1,058 lodging units were closed for restorations.

** Based on units available to be rented.

Key Collier Visitation Metrics (%Δ)



Key Collier Visitation Metrics (%Δ)



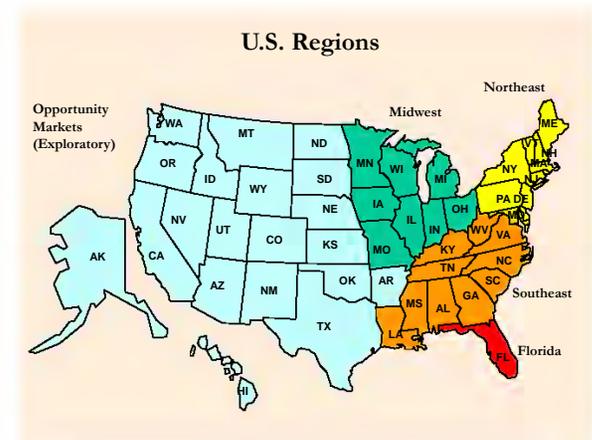
Naples, Marco Island, Everglades: July 2018 Summary

2. Compared to last July, half (**50.0%**) of Collier lodging managers report their three month forward reservations levels as “up.”

% of Properties (July)		
<u>Reporting Reservations:</u>	<u>2017</u>	<u>2018</u>
Up	31.9%	50.0%
Same	50.7	30.8
Down	17.4	19.2

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

<u>July Visitation</u>	<u>2018</u>	<u>Δ</u>
<u>Visitor #</u>		
Florida	69,614	-1.9%
Southeast	8,006	+3.9
Northeast	16,420	+19.1
Midwest	9,906	+12.7
Canada	1,221	-9.7
Europe	22,662	-5.3
Other	7,871	-9.0
Total	135,700	+0.4%



4. This July, nearly half of the destination’s visitor parties flew (**2017: 47.7%; 2018: 48.7%**). A majority of these (**55.9%**) deplaned at RSW, with Miami capturing some **24.1%** of deplanements.
5. This July, visitor party size averaged **3.0** travelers who stayed for **3.1 nights** in the Naples, Marco Island, Everglades area (**2017: 3.1 people; 3.2 nights**).

Naples, Marco Island, Everglades: July 2018 Summary

- 6.** Some **43.0%** of Collier's July visitors are in the destination for the first time.
- 7.** Fully **97.4%** consult the web for trip information, with some **86.6%** making bookings for their trip online.
- 8.** The vast majority (**94.9%**) are satisfied with their Collier stay, with **89.7%** planning a future trip to the area.
- 9.** The typical July visitor is **44.3 years of age (2017: 45.0 years)**.

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



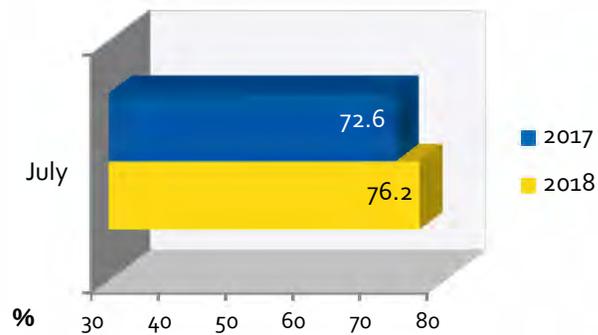
Naples, Marco Island, Everglades Visitor Profile | July 2018

H/M/C+ Visitor Statistics	Year to Date (January – July)			July		
	2017	2018	% Δ '17/'18	2017	2018*	% Δ '17/'18
Visitors (#)	1,167,700	1,181,200	+1.2	135,200	135,700	+0.4
Room Nights	1,529,700	1,516,500	-0.9	189,100	187,700	-0.7
Direct Exp. (\$)	\$954,337,100	\$994,890,800	+4.2	\$86,853,800	\$91,201,300	+5.0
Total Eco. Impact (\$)	\$1,422,916,600	\$1,483,382,200	+4.2	\$129,499,000	\$135,981,100	+5.0

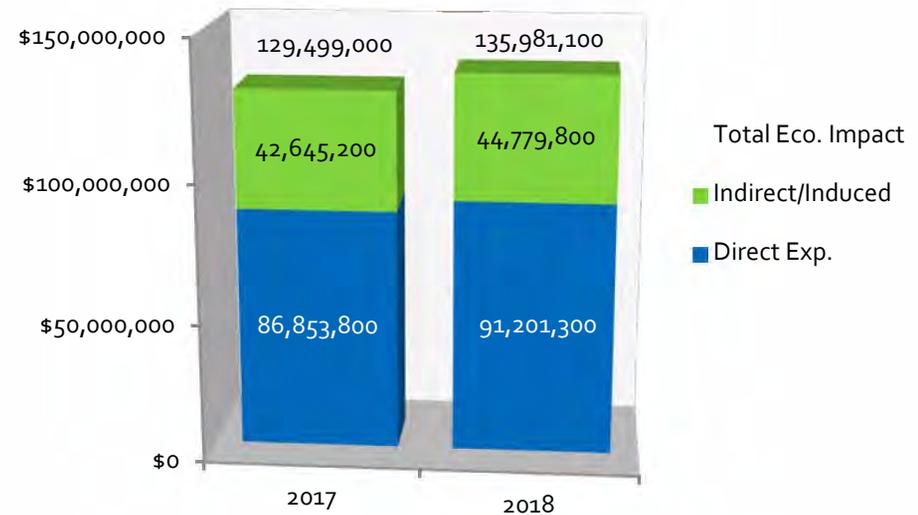
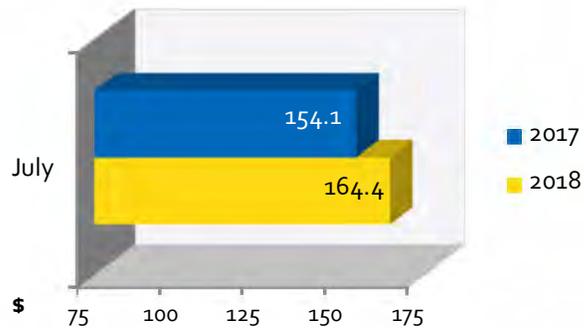
+ Visitors staying in commercial lodging subject to the resort tax (hotel/motel/condo, etc.)

July Economic Impact

July Occupancy



July Room Rates



July

Lodging Statistics

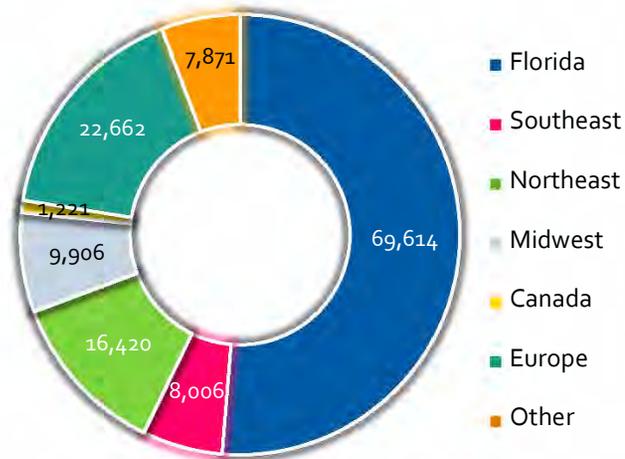
	2017	2018**	% Δ '17/'18
Occupancy	72.6%	76.2%	+5.0
Room Rates	\$154.1	\$164.4	+6.7
RevPAR	\$111.9	\$125.3	+12.0

** Note: As of July 2018, approximately 1,058 Collier lodging units were closed for renovations

July 2018 Visitor Origin Markets

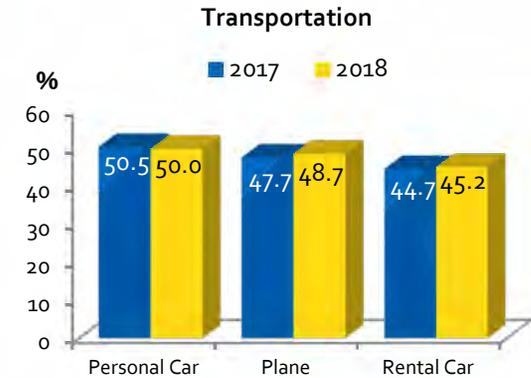
Visitor Origins	2017		2018		% Δ '17/'18
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	52.5%	70,980	51.3%	69,614	-1.9
Southeast	5.7	7,706	5.9	8,006	+3.9
Northeast	10.2	13,790	12.1	16,420	+19.1
Midwest	6.5	8,788	7.3	9,906	+12.7
Canada	1.0	1,352	0.9	1,221	-9.7
Europe	17.7	23,931	16.7	22,662	-5.3
Other	6.4	8,653	5.8	7,871	-9.0
Total	100.0	135,200	100.0	135,700	+0.4

July 2018 Visitor Origins

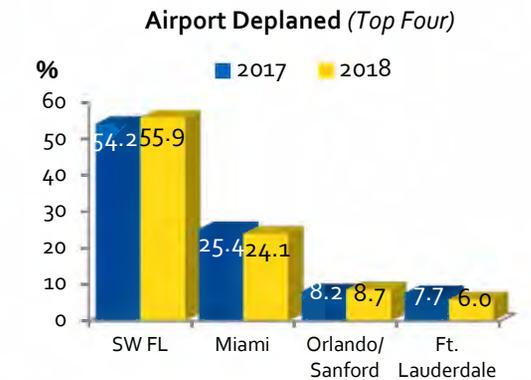


Naples, Marco Island, Everglades Visitor Profile | July 2018

Transportation Mode (Multiple Response)	July 2017	July 2018	
Personal Car	50.5%	50.0%	↓
Plane	47.7	48.7	↑
Rental Car	44.7	45.2	↑

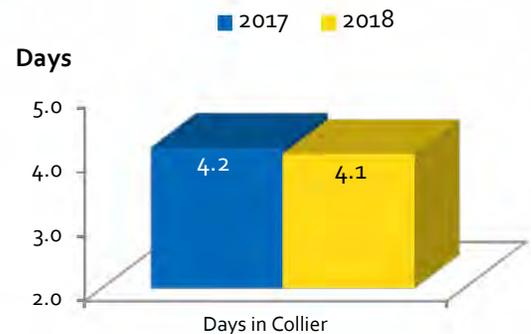


Airport Deplanned (Base: Flew)	July 2017	July 2018	
Southwest Florida International	54.2%	55.9%	↑
Miami International	25.4	24.1	↓
Orlando International/Sanford	8.2	8.7	↑
Ft. Lauderdale International	7.7	6.0	↓
Tampa International	3.1	4.0	↑



Purpose of Trip (Multiple Response)	July 2017	July 2018	
Vacation/Weekend Getaway	85.6%	85.3%	↓
Group Travel	19.8	22.9	↑
Visit with Friends and Relatives	10.0	11.4	↑
Special Event	4.9	3.4	↓

Length of Stay in Collier County (Days)



First Visit to (% yes)	July 2017	July 2018	
Collier County	45.6%	43.0%	↓
Florida	9.6	7.4	↓

Length of Stay (Days)	July 2017	July 2018	
In Collier County	4.2	4.1	↓

Party Size	July 2017	July 2018	
Number of People	3.1	3.0	↓

Naples, Marco Island, Everglades Visitor Profile | July 2018

Party Composition <i>(Multiple Response)</i>	July 2017	July 2018	
Family	47.4%	48.2%	↑
Couple	39.8	40.7	↑
Single	8.9	9.3	↑
Group of Friends	5.1	3.7	↓

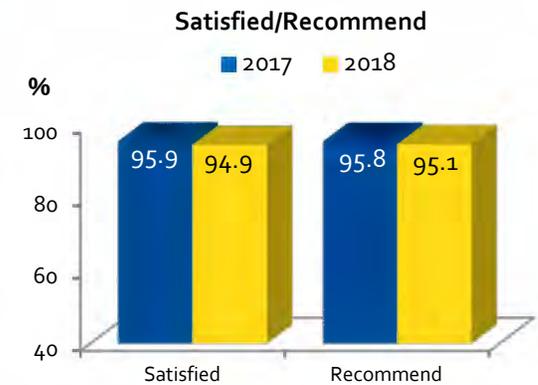
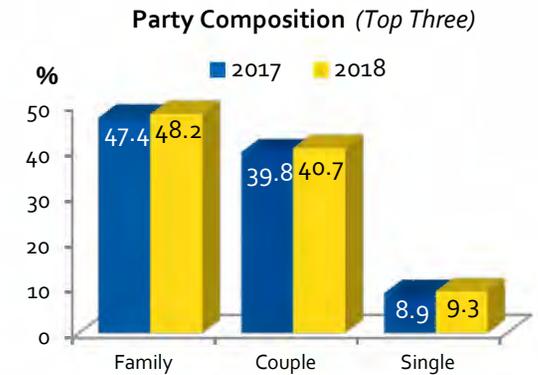
Did Party Have Lodging Reservations for Stay	July 2017	July 2018	
% Yes	94.5%	95.6%	↑

Expense Relative to Expectations	July 2017	July 2018	
More Expensive	18.5%	17.8%	↓
Less Expensive	3.3	3.6	↑
As Expected	73.9	74.6	↑

Satisfaction with Collier County	July 2017	July 2018	
Very Satisfied	85.6%	86.5%	↑
Satisfied	10.3	8.4	↓
Satisfaction Level <i>(Combined)</i>	95.9%	94.9%	↓

Recommend Collier to Friends/Relatives	July 2017	July 2018	
% Yes	95.8%	95.1%	↓

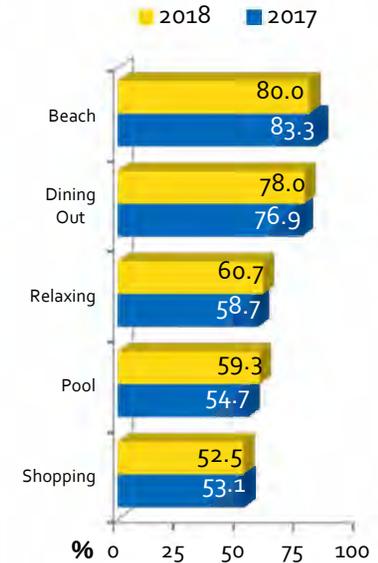
Plan to Return (% Yes)	July 2017	July 2018	
To Local Area	88.7%	89.7%	↑



Naples, Marco Island, Everglades Visitor Profile | July 2018

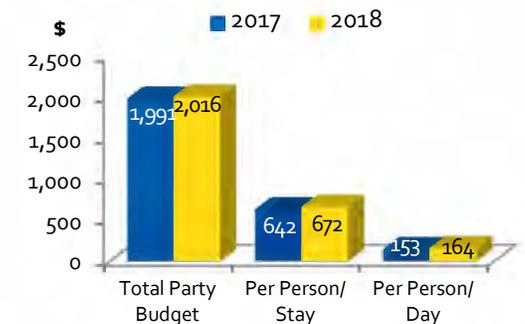
Activities Enjoyed in Area (Multiple Response)	July 2017	July 2018	
Beach	83.3%	80.0%	↓
Dining Out	76.9	78.0	↑
Relaxing	58.7	60.7	↑
Pool	54.7	59.3	↑
Shopping	53.1	52.5	↓
Sightseeing	37.1	36.4	↓
Sunsets	33.1	35.6	↑
Swimming	36.5	34.6	↓
Sunning	28.3	30.7	↑
Enjoying Nature/Bird Watching/Everglades	36.3	26.9	↓
Bars/Nightlife	23.1	23.4	↑
Walking	24.7	21.5	↓
Reading	17.1	20.6	↑
Shelling	17.5	16.3	↓
Visiting with Friends/Relatives	10.7	13.6	↑
Art Galleries/Shows/Fairs	13.3	11.9	↓
Fishing	14.3	10.2	↓
Golfing	8.7	7.4	↓

Activities Enjoyed in Area (Top Five)



Demographics	July 2017	July 2018	
Average Age Head of Household (Years)	45.0	44.3	↓
Median Annual Household Income	\$139,893	\$141,802	↑

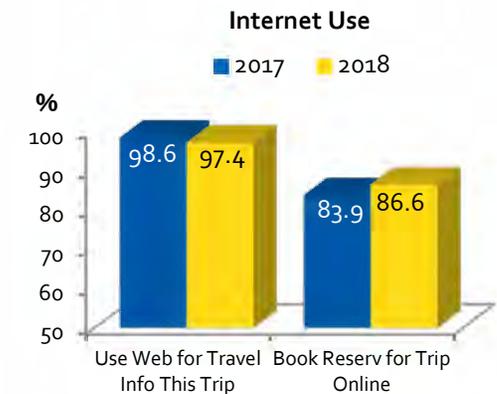
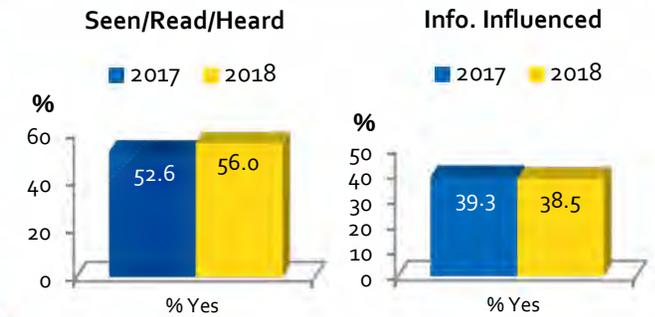
Collier Base Budgets



Collier Base Budget	July 2017	July 2018	
Total	\$1,991.48	\$2,016.25	↑
Per Person/Stay	642.41	672.08	↑
Per Person/Day	152.96	163.92	↑

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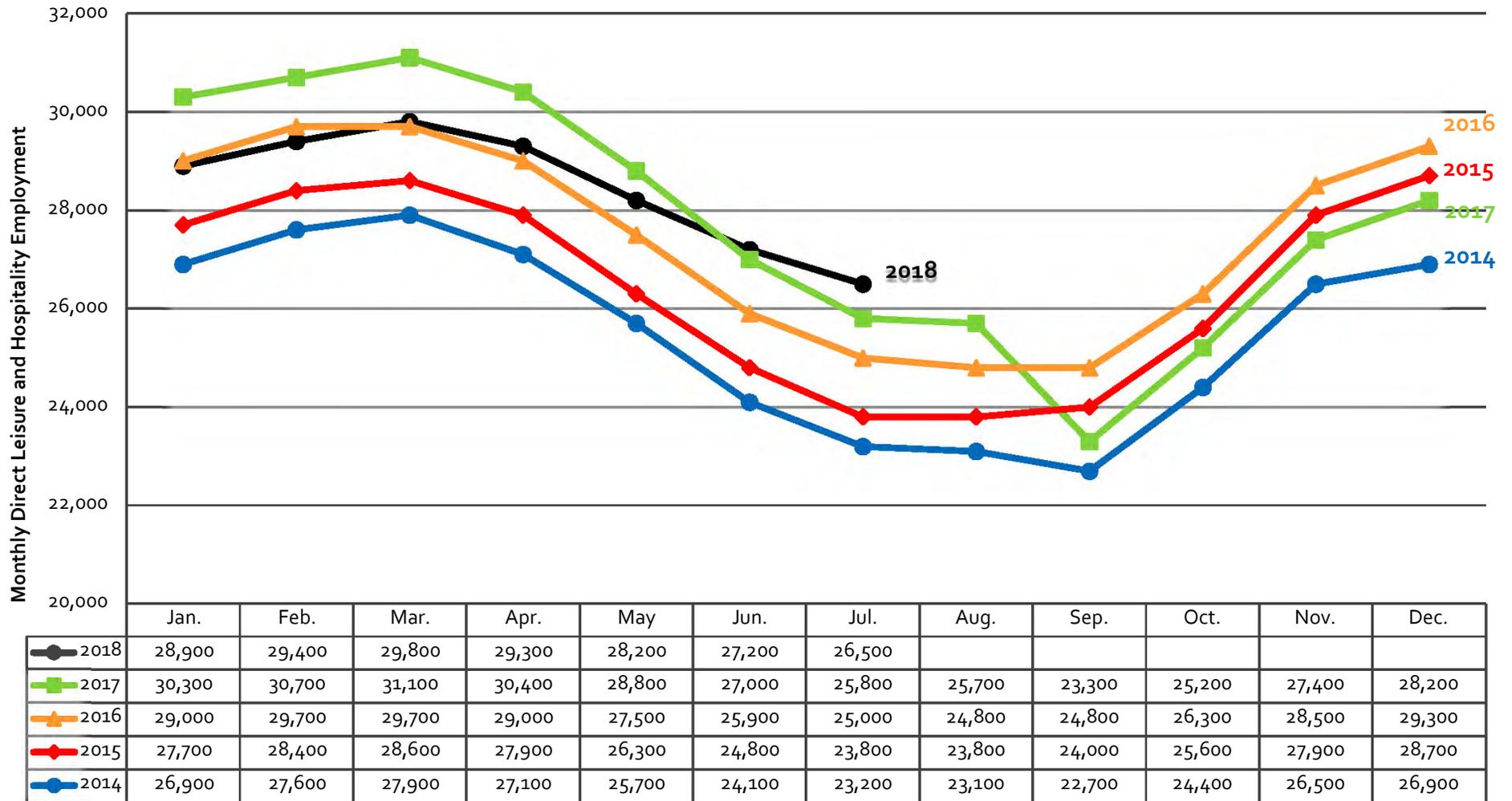
Area Information Seen/Read/Heard	July 2017	July 2018	
% Yes	52.6%	56.0%	↑
Directly Influenced by Information (Base: Seen/Read/Heard Area Information)			
	July 2017	July 2018	
% Yes	39.3%	38.5%	↓
Why Chose the Area (Multiple Response)			
	July 2017	July 2018	
Beach Area	60.0%	60.3%	↑
Relaxing	42.4	44.7	↑
Quiet/Peaceful/Laid Back	41.7	43.1	↑
Quality of Accommodations	39.6	41.4	↑
Restaurants	36.7	37.9	↑
Appealing Brochures/Websites	31.0	34.1	↑
Not Crowded	34.7	32.6	↓
Previous Experience	31.7	32.3	↑
Weather	23.7	28.7	↑
Recommendation	27.6	25.2	↓
Never Been	26.2	23.0	↓
Business/Meeting/Conference	19.3	22.0	↑
Outdoor Recreation/Nature	23.3	20.7	↓
Internet Use			
	July 2017	July 2018	
Use Internet to Obtain Travel Info for This Trip (% Yes)	98.6%	97.4%	↓
Book Reservations for Trip Online (%Yes)	83.9	86.6	↑



Industry Data: *2014-2018*

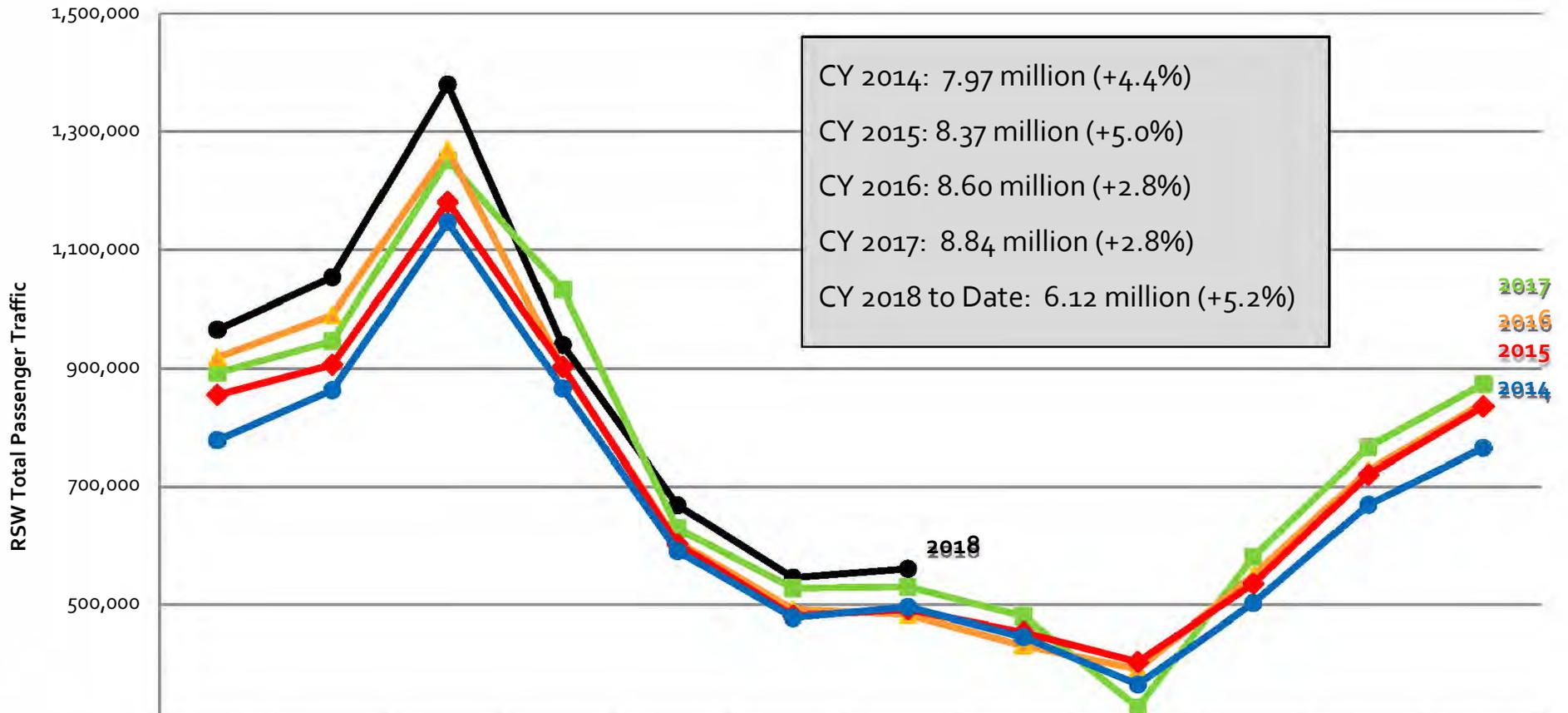


Collier Direct Leisure and Hospitality Employment (Calendar Year) *



* 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.
2018	965,981	1,053,817	1,379,728	939,957	668,665	546,159	561,039					
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