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Naples, Marco Island, Everglades Convention and Visitors Bureau March 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

April 2017

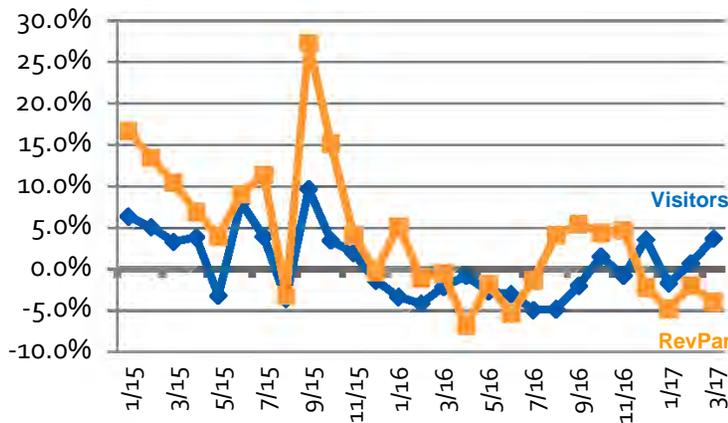
Naples, Marco Island, Everglades: March 2017 Summary

Executive Summary: March 2017

- This March, some **230,700** visitors stayed in Collier's commercial lodgings (**+3.7%**). Their visits contributed an estimated **\$333,379,300** of economic impact to the County (**+6.4%**). Key performance metrics are as follows:

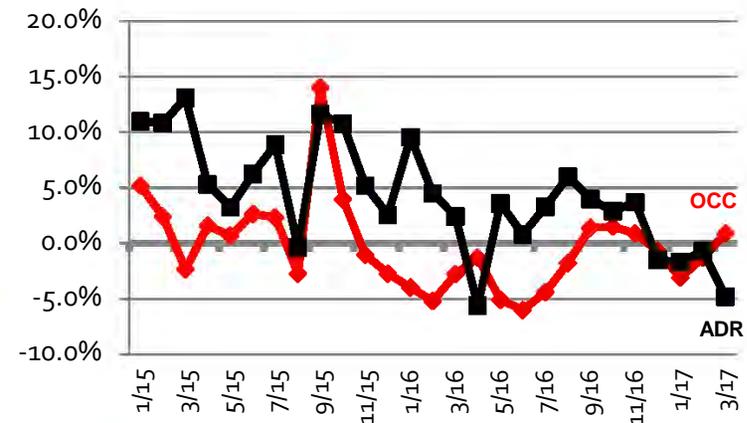
<u>March</u>	<u>2016</u>	<u>2017</u>	<u>% Δ</u>
Occupancy	89.5%	90.3%	+0.9%
ADR	\$353.2	\$336.4	-4.8%
RevPAR	\$316.1	\$303.8	-3.9%

Key Collier Visitation Metrics (%Δ)



◆ % Change Visitors ◆ % Change RevPar

Key Collier Visitation Metrics (%Δ)



◆ % Change Occupancy ◆ % Change ADR

- Compared to last March, eight out of every ten (**81.3%**) lodging managers report their three month forward reservations levels as "up" or the "same":

<u>% of Properties (March)</u>	<u>2016</u>	<u>2017</u>
<u>Reporting Reservations:</u>		
Up	19.4%	50.0%
Same	32.3	31.3
Down	45.2	18.8

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

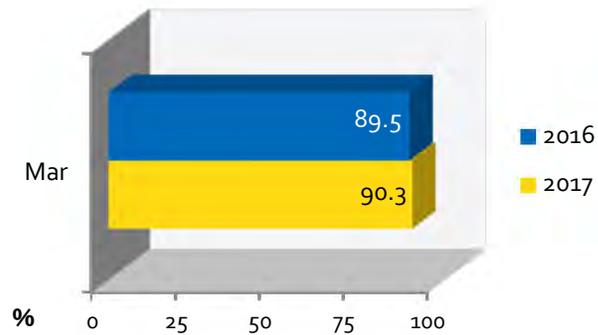


Naples, Marco Island, Everglades Visitor Profile | March 2017

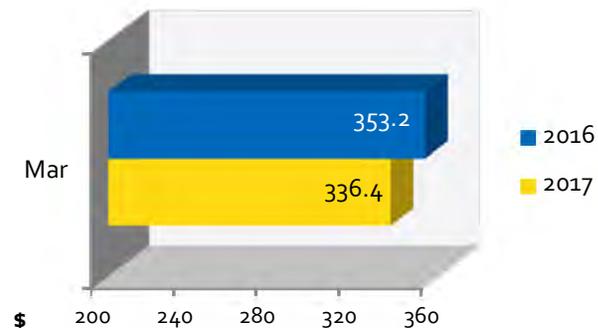
H/M/C* Visitor Statistics	Year to Date (Jan. – Mar.)			March		
	2016	2017	% Δ '16/'17	2016	2017	% Δ '16/'17
Visitors (#)	601,500	608,000	+1.1	222,500	230,700	+3.7
Room Nights	775,200	751,400	-3.1	277,500	273,300	-1.5
Direct Exp. (\$)	\$495,616,900	\$510,517,400	+3.0	\$210,198,000	\$223,594,400	+6.4
Total Eco. Impact (\$)	\$738,964,800	\$761,181,500	+3.0	\$313,405,200	\$333,379,300	+6.4

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

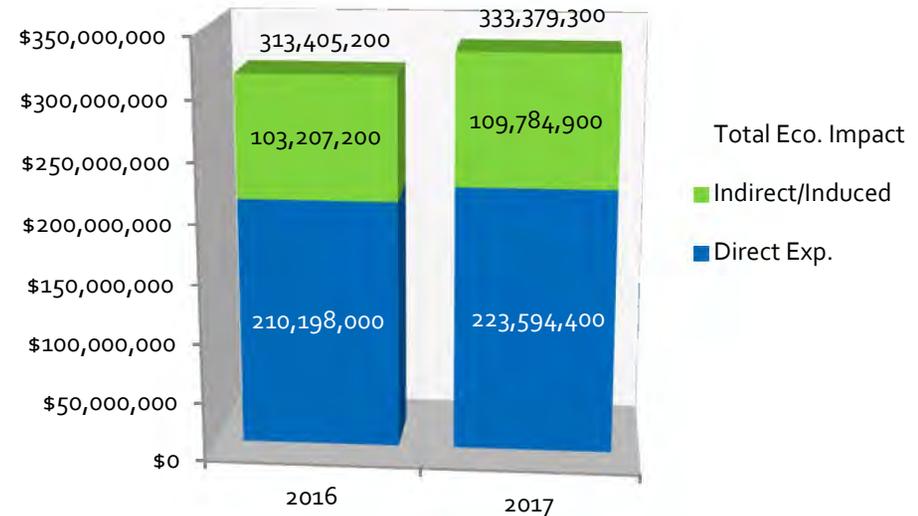
March Occupancy



March Room Rates



March Economic Impact



March

Lodging Statistics

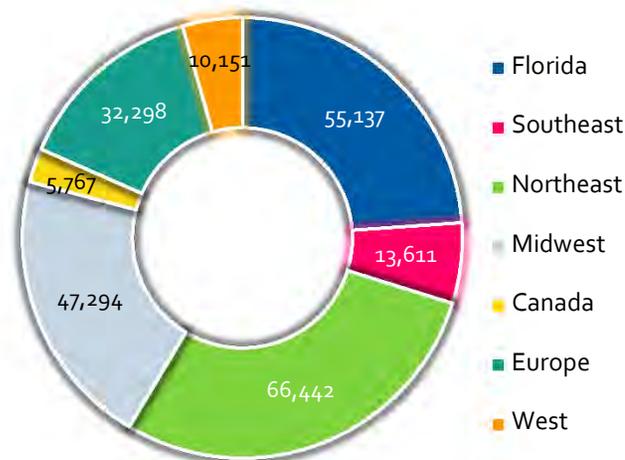
	2016	2017**	% Δ '16/'17
Occupancy	89.5%	90.3%	+0.9
Room Rates	\$353.2	\$336.4	-4.8
RevPAR	\$316.1	\$303.8	-3.9

** Note: 40 prime lodging units were closed for renovations

March 2017 Visitor Origin Markets

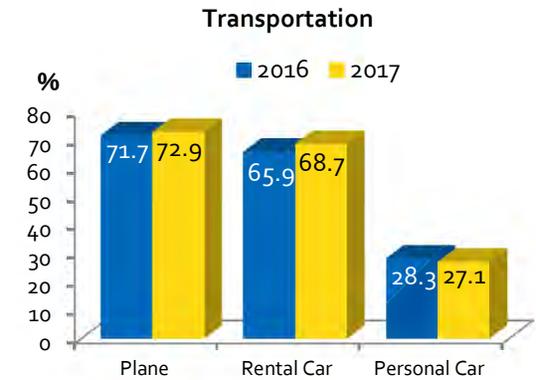
Visitor Origins	2016		2017		% Δ '16/'17
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	22.6%	50,285	23.9%	55,137	+9.6
Southeast	6.3	14,018	5.9	13,611	-2.9
Northeast	29.1	64,748	28.8	66,442	+2.6
Midwest	21.2	47,170	20.5	47,294	+0.3
Canada	2.3	5,117	2.5	5,767	+12.7
Europe	14.4	32,040	14.0	32,298	+0.8
West	4.1	9,122	4.4	10,151	+11.3
Total	100.0	222,500	100.0	230,700	+3.7

March 2017 Visitor Origins

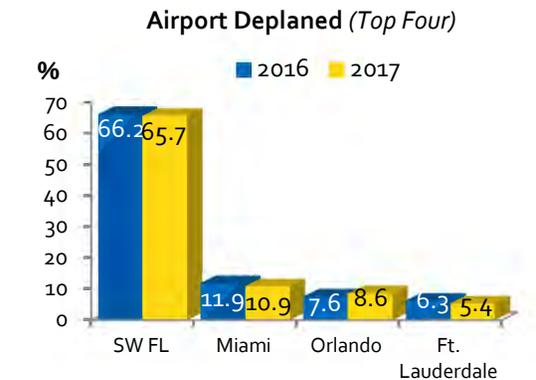


Naples, Marco Island, Everglades Visitor Profile March 2017

Transportation Mode (Multiple Response)	March 2016	March 2017
Plane	71.7%	72.9%
Rental Car	65.9	68.7
Personal Car	28.3	27.1



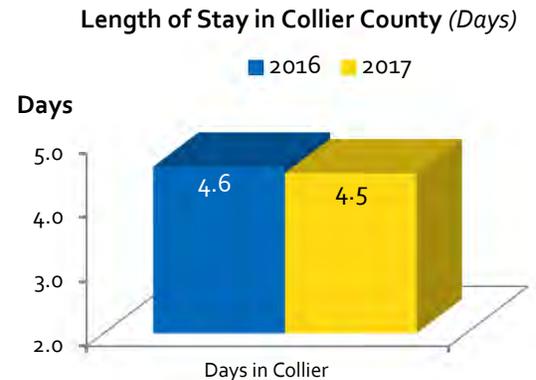
Airport Deplaned (Base: Flew)	March 2016	March 2017
Southwest Florida International	66.2%	65.7%
Miami International	11.9	10.9
Orlando International/Sanford	7.6	8.6
Ft. Lauderdale International	6.3	5.4
Tampa International	3.6	4.3



Purpose of Trip (Multiple Response)	March 2016	March 2017
Vacation/Weekend Getaway	81.9%	81.3%
Group Travel	22.6	23.4
Visit with Friends and Relatives	15.6	13.9

First Visit to (% yes)	March 2016	March 2017
Collier County	42.1%	41.3%
Florida	5.3	3.7

Length of Stay (Days)	March 2016	March 2017
In Collier County	4.6	4.5



Party Size	March 2016	March 2017
Number of People	2.7	2.8

Party Composition (Multiple Response)	March 2016	March 2017
Couple	61.9%	62.4%
Family	31.0	33.9
Group of Friends	6.5	7.0
Single	6.8	5.2

Did Party Have Lodging Reservations for Stay	March 2016	March 2017
% Yes	95.5%	95.7%

Naples, Marco Island, Everglades Visitor Profile | March 2017

Satisfaction with Collier County	March 2016	March 2017
Very Satisfied	85.7%	87.3%
Satisfied	10.0	6.3
Satisfaction Level (Combined)	95.7%	93.6%

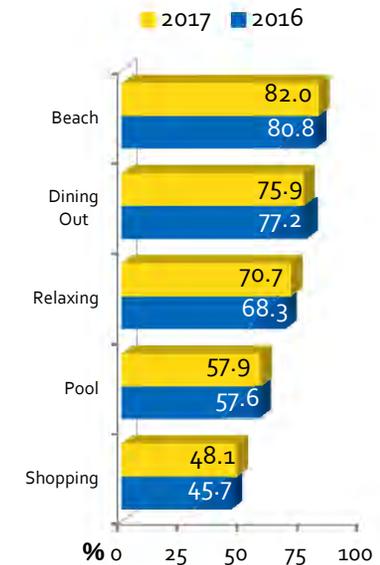
Activities Enjoyed in Area (Multiple Response)	March 2016	March 2017
Beach	80.8%	82.0%
Dining Out	77.2	75.9
Relaxing	68.3	70.7
Pool	57.6	57.9
Shopping	45.7	48.1
Swimming	34.5	35.2
Sightseeing	32.4	31.2
Reading	25.0	28.2
Sunsets	25.5	26.8
Sunning	22.5	26.3
Walking	21.0	22.8
Visiting with Friends/Relatives	23.7	22.6
Bars/Nightlife	20.1	17.3
Art Galleries/Shows/Fairs	18.3	17.1
Enjoying Nature/Bird Watching/Everglades	19.6	16.3
Shelling	14.7	16.0
Golfing	10.0	12.0
Canoeing/Kayaking	7.4	9.6

Expense Relative to Expectations	March 2016	March 2017
More Expensive	29.8%	23.0%
Less Expensive	1.1	3.0
As Expected	63.8	67.6

Demographics	March 2016	March 2017
Average Age Head of Household (Years)	52.4	51.9
Median Annual Household Income	\$170,114	\$176,217

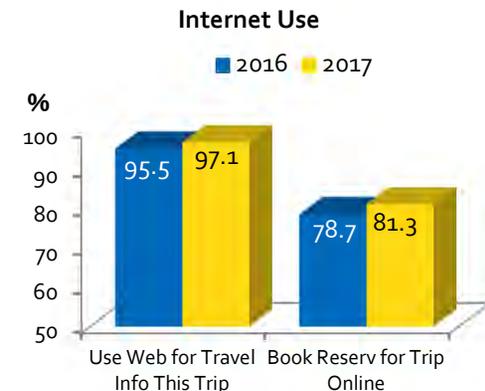
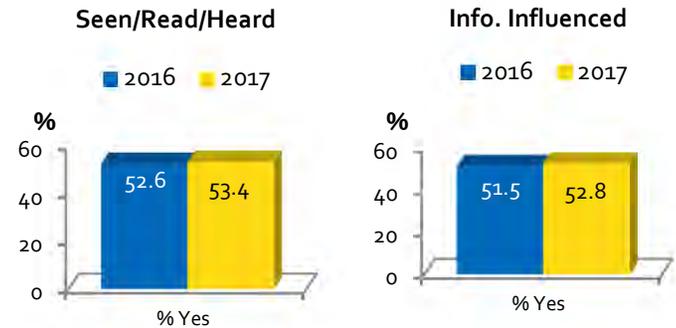
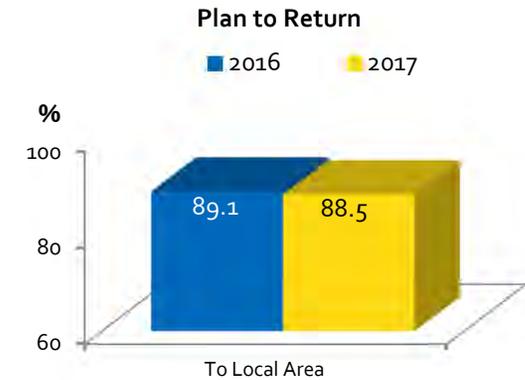


Activities Enjoyed in Area (Top Five)



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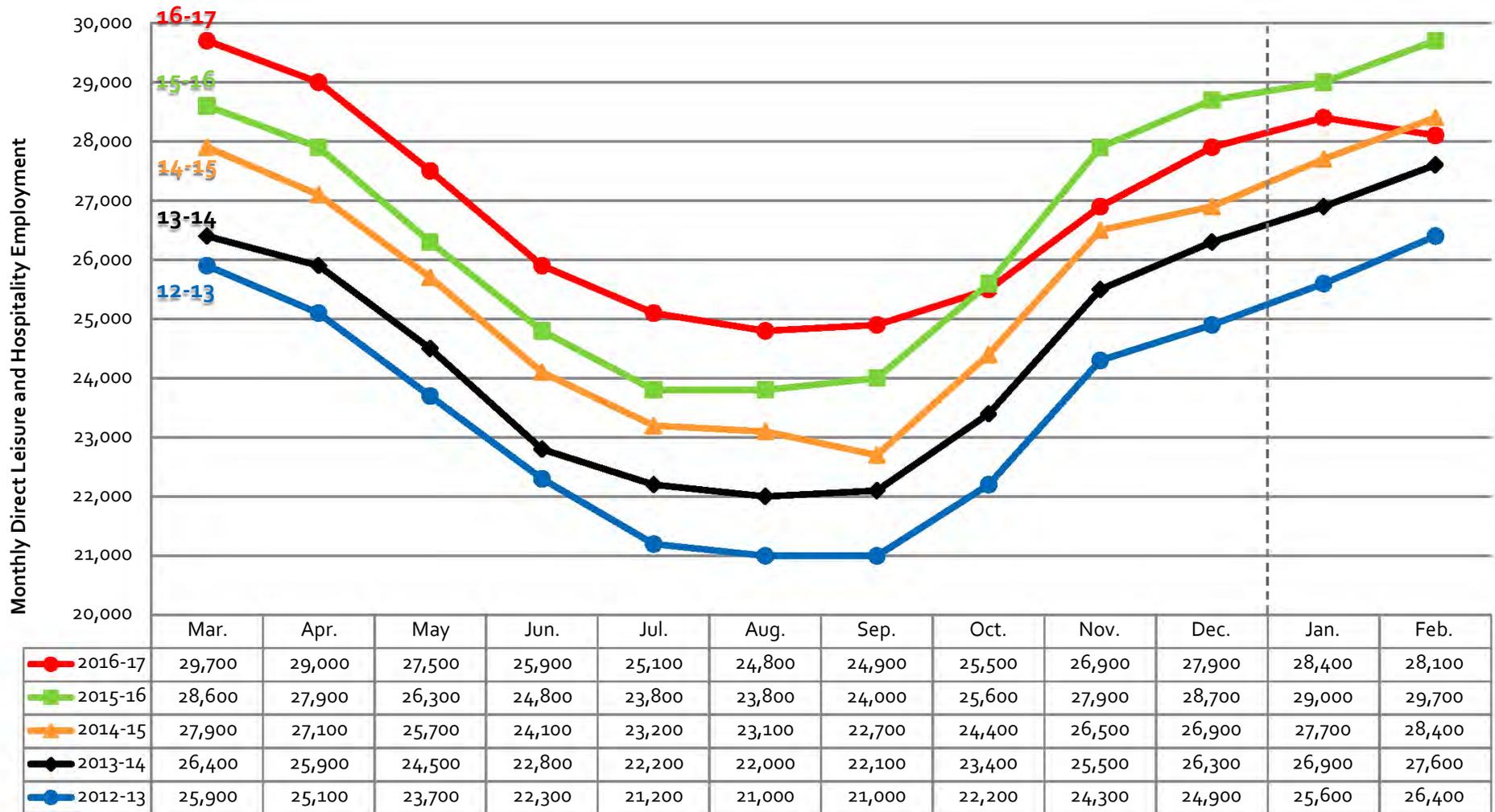
Recommend Collier to Friends/Relatives	March 2016	March 2017
% Yes	90.6%	92.2%
Plan to Return (% Yes)	March 2016	March 2017
To Local Area	89.1%	88.5%
Collier Base Budget	March 2016	March 2017
Total	\$2,550.72	\$2,713.75
Per Person/Stay	944.71	969.20
Per Person/Day	205.37	215.38
Area Information Seen/Read/Heard	March 2016	March 2017
% Yes	52.6%	53.4%
Directly Influenced by Information (Base: Seen/Read/Heard Area Information)	March 2016	March 2017
% Yes	51.5%	52.8%
Why Chose the Area (Multiple Response)	March 2016	March 2017
Beach Area	56.5%	56.0%
Weather	49.1	53.7
Previous Experience	33.7	35.7
Relaxing	37.6	34.9
Quiet/Peaceful/Laid Back	31.6	34.3
Recommendation	32.0	31.5
Restaurants	34.8	30.3
Appealing Brochures/Websites	27.8	29.6
Quality of Accommodations	26.1	26.9
Business/Meeting/Conference	23.8	25.0
Outdoor Recreation/Nature	25.0	22.1
Never Been	21.7	21.4
Not Crowded	17.5	17.2
Internet Use	March 2016	March 2017
Use Internet to Obtain Travel Info for This Trip (% Yes)	95.5%	97.1%
Book Reservations for Trip Online (%Yes)	78.7	81.3



Industry Data: *2012-2017*

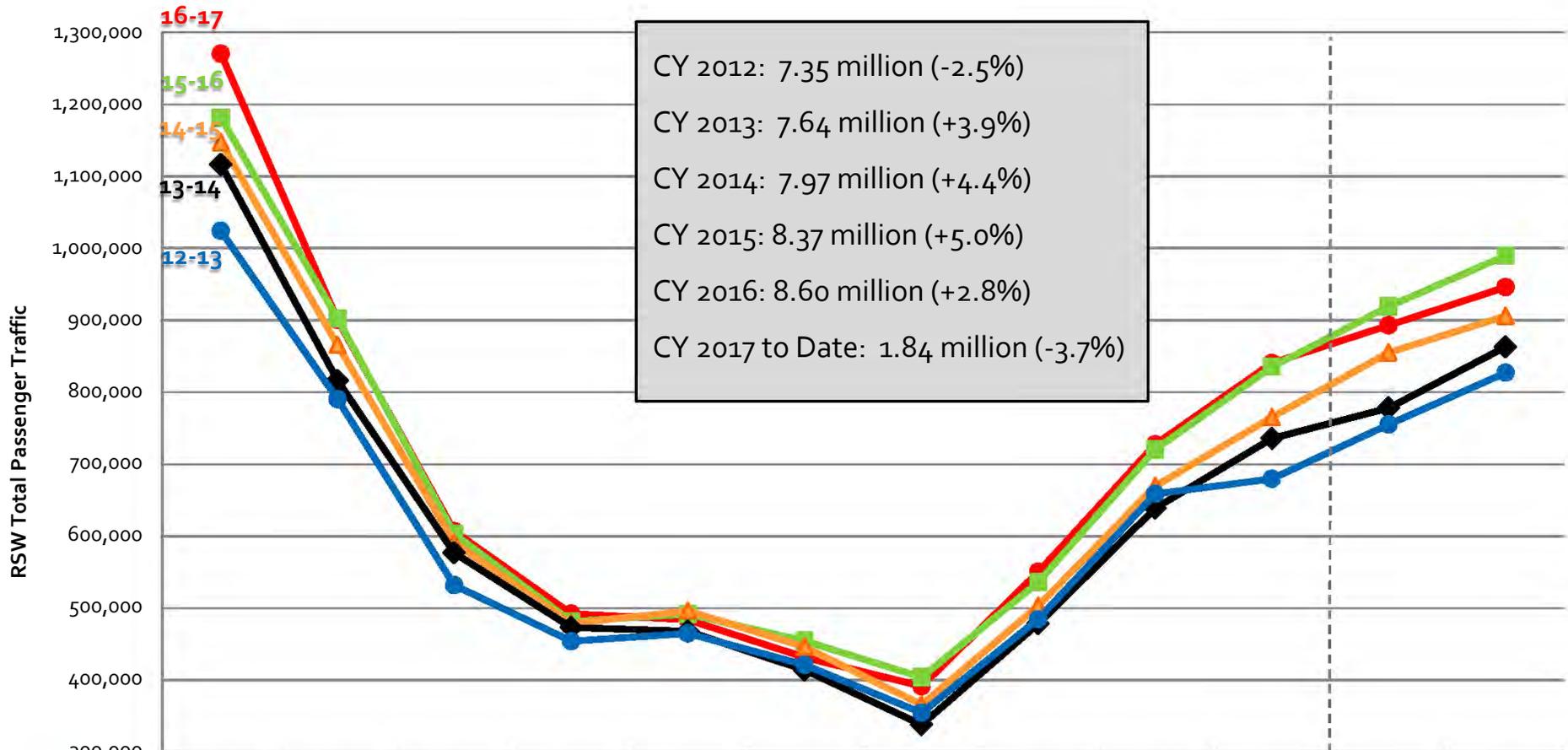


Collier Direct Leisure and Hospitality Employment (Calendar Year) *



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

Southwest Florida International Airport (RSW) Passenger Traffic



	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.
2016-17	1,269,961	900,594	606,833	492,413	484,074	431,729	391,844	550,316	727,634	840,501	892,905	946,079
2015-16	1,181,382	902,669	602,891	481,512	492,114	454,360	404,045	535,921	720,556	835,359	918,929	989,845
2014-15	1,147,059	865,554	591,116	478,692	496,472	446,402	366,038	503,243	669,567	765,288	854,953	906,039
2013-14	1,115,937	815,978	576,713	473,208	467,946	414,303	338,175	478,376	639,047	735,739	778,163	862,899
2012-13	1,024,221	790,322	531,946	454,044	464,896	421,211	354,640	484,768	658,629	679,672	755,232	827,147