Naples, Marco Island, Everglades Convention and Visitors Bureau
November 2017 Visitor Profile

Prepared for:

Collier County Board of County Commissioners

and

Naples, Marco Island, Everglades Convention and Visitors Bureau

Prepared by:

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www.ResearchDataLLC.com

December 2017

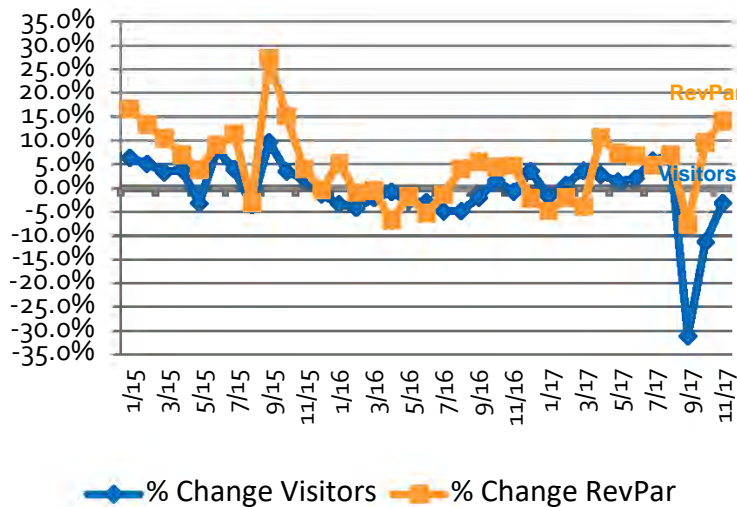## *Executive Summary:* *November 2017*

1. This November, some **139,400** visitors stayed in Collier's commercial lodgings **(-3.1%)***. Their visits contributed an estimated **$142,635,900** of economic impact to the County **(+2.5%)**. Key performance metrics are as follows:

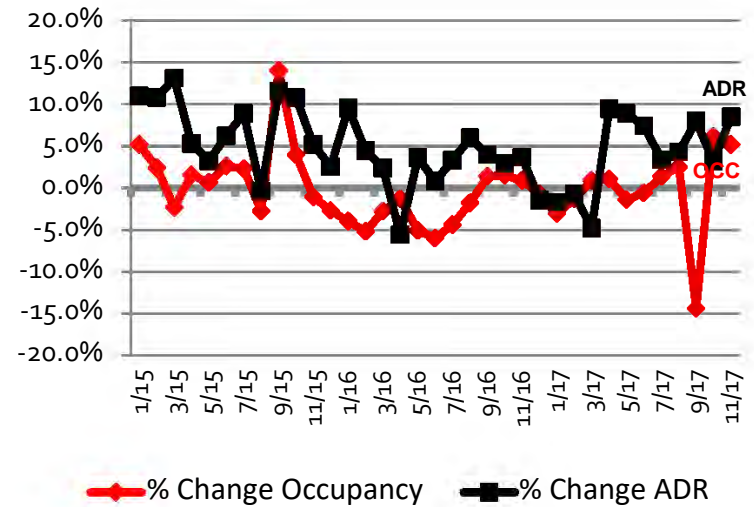| November	2016	2017**	% Δ
Occupancy	76.7%	80.7%	+5.2%
ADR	$170.1	$184.5	+8.5%
RevPAR	$130.5	$148.9	+14.1%

* Available records suggest that approximately 1,400 lodging units were closed in November 2017.

** Based on units available to be rented.

### Key Collier Visitation Metrics *(%Δ)*

Legend: % Change Visitors — % Change RevPar

Key Collier Visitation Metrics *(%Δ)*

Legend: % Change Occupancy — % Change ADR

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

% of Properties (November)		
Reporting Reservations:	2016	2017
Up	40.7%	50.0%
Same	26.7	30.8
Down	32.6	19.2

3. Collier's November visitation originates from the following primary market segments:

November Visitation	2017 Visitor #	Δ
Florida	54,087	-0.3%
Southeast	9,061	-7.4
Northeast	18,401	+0.7
Midwest	20,213	-6.4
Canada	2,788	-11.9
Europe	28,856	-10.5
Other	5,994	+30.2
Total	**139,400**	**-3.1%**

U.S. Regions
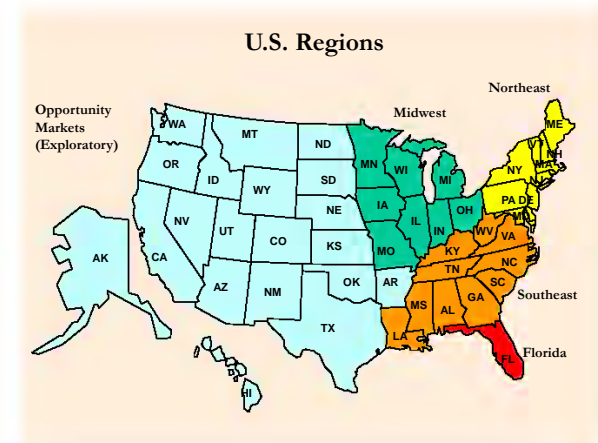
4. This November, six out of every ten of the destination's visitor parties flew *(2016: 61.9%; 2017: 60.9%).* A majority of these **(55.1%)** deplaned at RSW, with Miami capturing some **26.3%** of deplanements.

5. This November, visitor party size averaged **2.5** travelers who stayed for **3.3** nights in the Naples, Marco Island, Everglades area *(2016: 2.4 people; 3.2 nights)*.

6. Some **41.7%** of Collier's November visitors are in the destination for the first time *(2016: 43.2%)*.

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7. Fully **93.9%** consult the web for trip information, with some **84.0%** making bookings for their trip online.

8. The vast majority **(96.4%)** are satisfied with their Collier stay, with **94.0%** planning a future trip to the area.

9. The typical November visitor is **47.6 years of age** *(2016: 47.8 years).*

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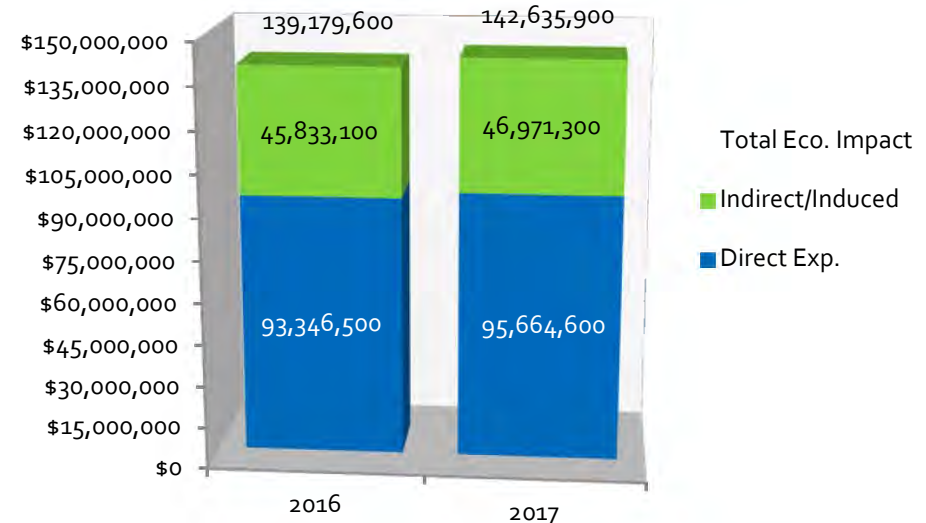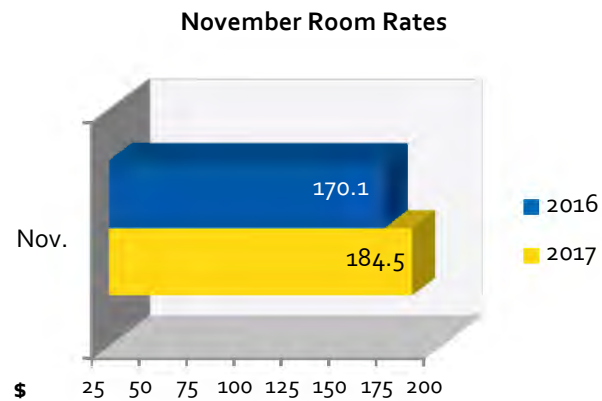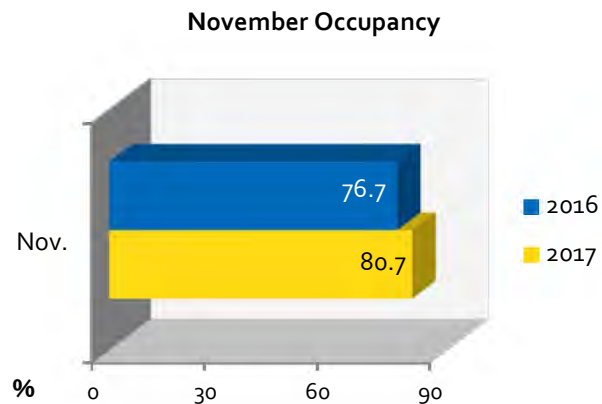# Naples, Marco Island, Everglades:
November 2017 Visitor Profile

Naples, Marco Island, Everglades Visitor Profile | November 2017

H/M/C+ Visitor Statistics	Year to Date (January – November)		% Δ '16/'17	November		% Δ '16/'17
	2016	2017		2016	2017*	
Visitors (#)	1,638,400	1,617,000	-1.3	143,900	139,400	-3.1
Room Nights	2,226,700	2,165,000	-2.8	188,700	174,300	-7.6
Direct Exp. ($)	$1,204,442,100	$1,240,185,700	+3.0	$93,346,500	$95,664,600	+2.5
Total Eco. Impact ($)	$1,795,823,200	$1,849,116,900	+3.0	$139,179,600	$142,635,900	+2.5

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

November Occupancy

- 2016
- 2017

76.7

80.7

November Economic Impact

139,179,600   142,635,900

45,833,100   46,971,300

93,346,500   95,664,600

Total Eco. Impact
- Indirect/Induced
- Direct Exp.

November Room Rates

170.1

184.5

- 2016
- 2017

November

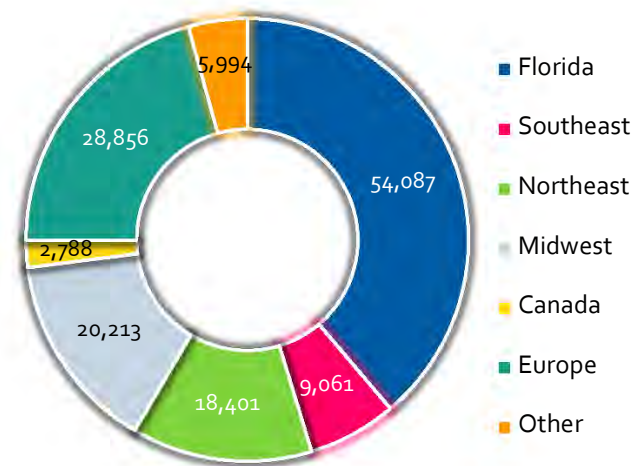| Lodging Statistics	2016	2017**	% Δ '16/'17
Occupancy	76.7%	80.7%	+5.2
Room Rates	$170.1	$184.5	+8.5
RevPAR	$130.5	$148.9	+14.1

*Available records suggest that approximately 1,400 units were closed in November 2017 due to the impact of Hurricane Irma and ongoing restorations.
** Based on units available to be rented.

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November 2017 Visitor Origin Markets

Visitor Origins	2016		2017		% Δ '16/'17
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	37.7%	54,250	38.8%	54,087	-0.3
Southeast	6.8	9,785	6.5	9,061	-7.4
Northeast	12.7	18,275	13.2	18,401	+0.7
Midwest	15.0	21,585	14.5	20,213	-6.4
Canada	2.2	3,166	2.0	2,788	-11.9
Europe	22.4	32,234	20.7	28,856	-10.5
Other	3.2	4,605	4.3	5,994	+30.2
Total	**100.0**	**143,900**	**100.0**	**139,400**	**-3.1**

November 2017 Visitor Origins

Legend: Florida, Southeast, Northeast, Midwest, Canada, Europe, Other

Values shown: 54,087; 9,061; 18,401; 20,213; 2,788; 28,856; 5,994

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Transportation Mode (Multiple Response)	November 2016	November 2017
Plane	61.9%	60.9%
Rental Car	57.6	56.5
Personal Car	37.9	38.8
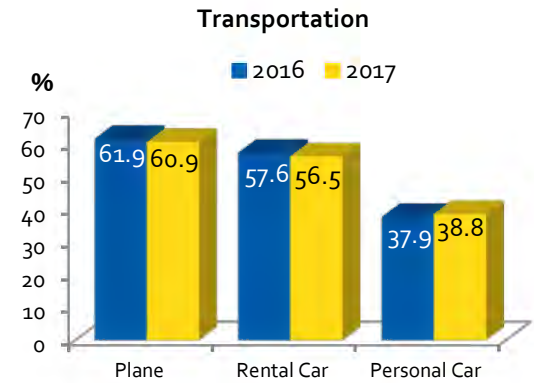
Airport Deplaned (Base: Flew)	November 2016	November 2017
Southwest Florida International	53.9%	55.1%
Miami International	29.0	26.3
Orlando International/Sanford	6.0	7.8
Tampa International	5.9	5.5
Ft. Lauderdale International	4.8	5.1
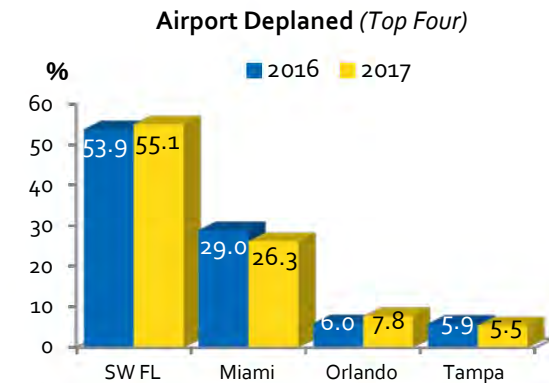
Purpose of Trip (Multiple Response)	November 2016	November 2017
Vacation/Weekend Getaway	69.6%	65.7%
Group Travel	31.9	33.4
Visit with Friends and Relatives	12.2	12.9
Special Event	11.5	10.9

First Visit to (% yes)	November 2016	November 2017
Collier County	43.2%	41.7%
Florida	4.8	4.5

Length of Stay (Days)	November 2016	November 2017
In Collier County	4.2	4.3

Party Size	November 2016	November 2017
Number of People	2.4	2.5

Party Composition (Multiple Response)	November 2016	November 2017
Couple	59.6%	57.3%
Family	30.9	31.8
Single	7.7	8.7
Business Associates	4.6	4.9
Group of Couples	2.7	3.6
Group of Friends	3.4	3.5

Transportation

Airport Deplaned (Top Four)

Length of Stay in Collier County (Days)

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Did Party Have Lodging Reservations for Stay	November 2016	November 2017
% Yes	93.1%	94.0%

Satisfaction with Collier County	November 2016	November 2017
Very Satisfied	88.5%	89.9%
Satisfied	5.7	6.5
Satisfaction Level *(Combined)*	**94.2%**	**96.4%**

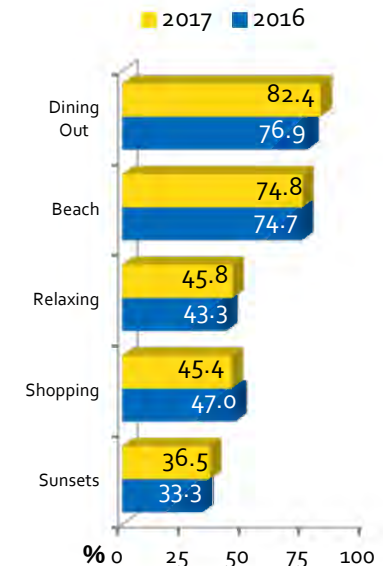| Activities Enjoyed in Area *(Multiple Response)*	November 2016	November 2017
Dining Out	76.9%	82.4%
Beach	74.7	74.8
Relaxing	43.3	45.8
Shopping	47.0	45.4
Sunsets	33.3	36.5
Sunning	32.7	34.1
Enjoying Nature/Bird Watching/Everglades	29.0	27.2
Sightseeing	27.0	25.4
Pool	20.4	23.8
Swimming	23.1	20.9
Reading	21.3	18.1
Art Galleries/Shows/Fairs	19.5	17.2
Shelling	16.7	17.2
Walking	16.9	16.8
Bars/Nightlife	18.6	15.8
Visiting with Friends/Relatives	13.5	14.7
Boating	n/a	13.4
Golfing	12.2	10.2

Expense Relative to Expectations	November 2016	November 2017
More Expensive	20.8%	22.3%
Less Expensive	1.9	7.4
As Expected	68.9	57.9

Demographics	November 2016	November 2017
Average Age Head of Household *(Years)*	47.8	47.6
Median Annual Household Income	$164,813	$167,934

Satisfied/Recommend

2016   2017

	Satisfied	Recommend
2016	94.2	93.3
2017	96.4	94.2
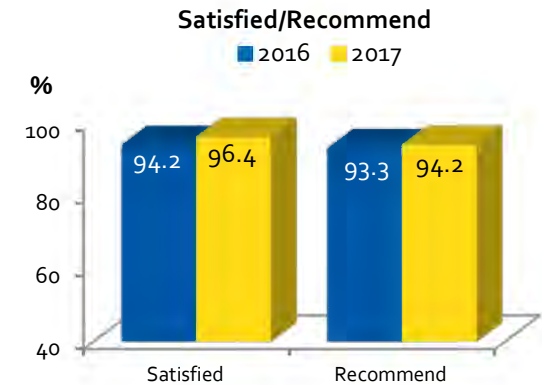
Activities Enjoyed in Area *(Top Five)*

2017   2016

	2016	2017
Dining Out	76.9	82.4
Beach	74.7	74.8
Relaxing	43.3	45.8
Shopping	47.0	45.4
Sunsets	33.3	36.5

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Recommend Collier to Friends/Relatives	November 2016	November 2017
% Yes	93.3%	94.2%

Plan to Return *(% Yes)*	November 2016	November 2017
To Local Area	94.5%	94.0%

Collier Base Budget	November 2016	November 2017
Total	$1,556.86	$1,715.64
Per Person/Stay	648.69	686.26
Per Person/Day	154.45	159.59

Area Information Seen/Read/Heard	November 2016	November 2017
% Yes	65.1%	67.2%

Directly Influenced by Information *(Base: Seen/Read/Heard Area Information)*	November 2016	November 2017
% Yes	42.6%	40.0%

Why Chose the Area *(Multiple Response)*	November 2016	November 2017
Beach Area	60.9%	59.7%
Quiet/Peaceful/Laid Back	48.1	51.2
Weather	50.0	45.3
Relaxing	40.9	41.8
Not Crowded	40.3	37.5
Business/Meeting/Conference	35.0	36.8
Previous Experience	33.4	36.5
Quality of Accommodations	36.5	34.9
Appealing Brochures/Websites	36.2	33.8
Outdoor Recreation/Nature	34.7	31.4
Restaurants	29.9	30.3
Shopping	29.1	25.5
Recommendation	26.9	22.1
Never Been	24.7	20.9

Internet Use	November 2016	November 2017
Use Internet to Obtain Travel Info for This Trip *(% Yes)*	94.3%	93.9%
Book Reservations for Trip Online *(%Yes)*	82.3	84.0

Plan to Return

2016 2017

To Local Area
94.5 94.0

Seen/Read/Heard

2016 2017

% Yes
65.1 67.2

Info. Influenced

2016 2017

% Yes
42.6 40.0

Internet Use

2016 2017

Use Web for Travel Info This Trip: 94.3 93.9
Book Reserv for Trip Online: 82.3 84.0

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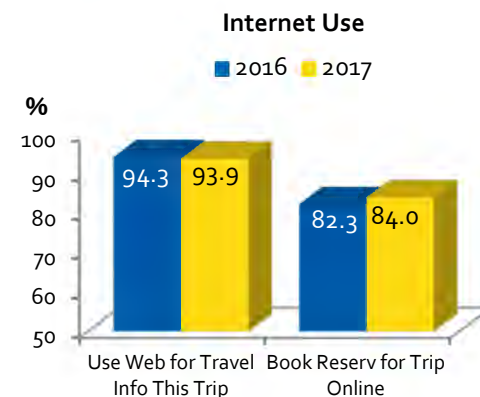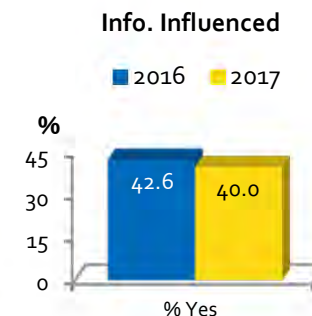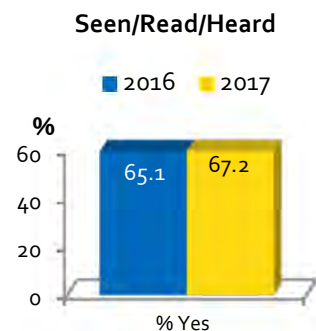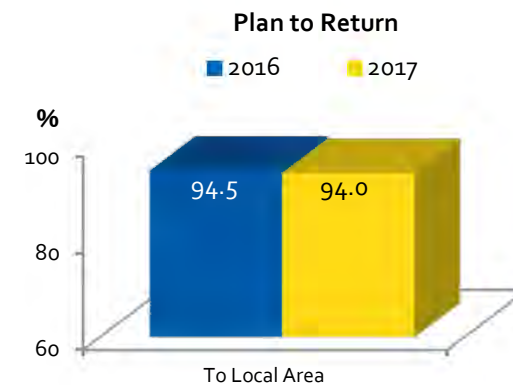
Industry Data:

2012-2017

Collier Direct Leisure and Hospitality Employment *(Calendar Year)* *

	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.
2016-17	26,900	27,900	28,400	28,100	28,700	29,000	27,400	25,600	25,000	24,500	23,200	26,300
2015-16	27,900	28,700	29,000	29,700	29,700	29,000	27,500	25,900	25,100	24,800	24,900	25,500
2014-15	26,500	26,900	27,700	28,400	28,600	27,900	26,300	24,800	23,800	23,800	24,000	25,600
2013-14	25,500	26,300	26,900	27,600	27,900	27,100	25,700	24,100	23,200	23,100	22,700	24,400
2012-13	24,300	24,900	25,600	26,400	26,400	25,900	24,500	22,800	22,200	22,000	22,100	23,400

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

Southwest Florida International Airport (RSW) Passenger Traffic

CY 2012: 7.35 million (-2.5%)

CY 2013: 7.64 million (+3.9%)

CY 2014: 7.97 million (+4.4%)

CY 2015: 8.37 million (+5.0%)

CY 2016: 8.60 million (+2.8%)

CY 2017 to Date: 7.97 million (+2.6%)

RSW Total Passenger Traffic

16-17
15-16
14-15
13-14
12-13
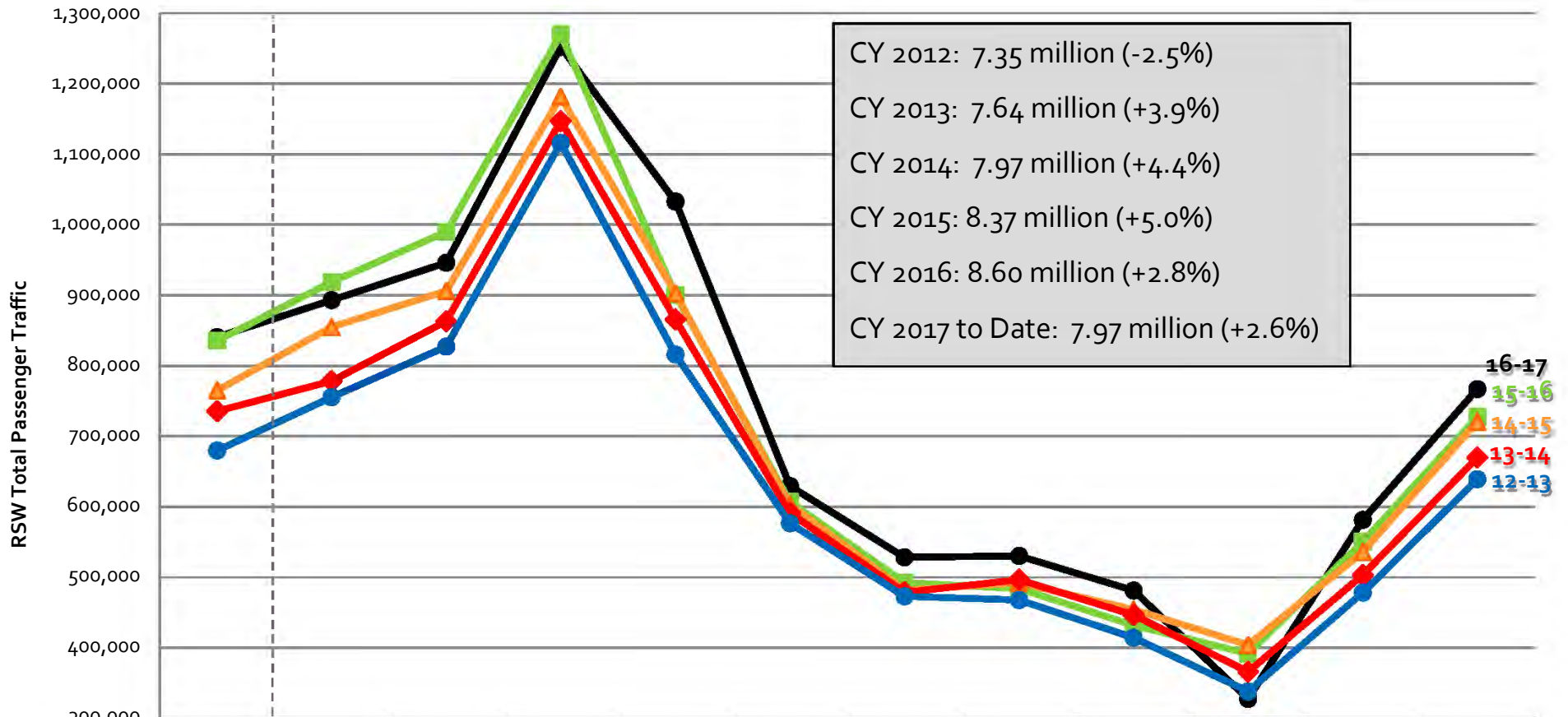
	Dec.	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.
2016-17	840,501	892,905	946,079	1,252,124	1,032,783	629,321	528,383	530,428	481,185	327,466	581,317	767,064
2015-16	835,359	918,929	989,845	1,269,961	900,594	606,833	492,413	484,074	431,729	391,844	550,316	727,634
2014-15	765,288	854,953	906,039	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

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