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Naples, Marco Island, Everglades Convention and Visitors Bureau June 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

July 2017

Naples, Marco Island, Everglades: June 2017 Summary

Executive Summary: June 2017

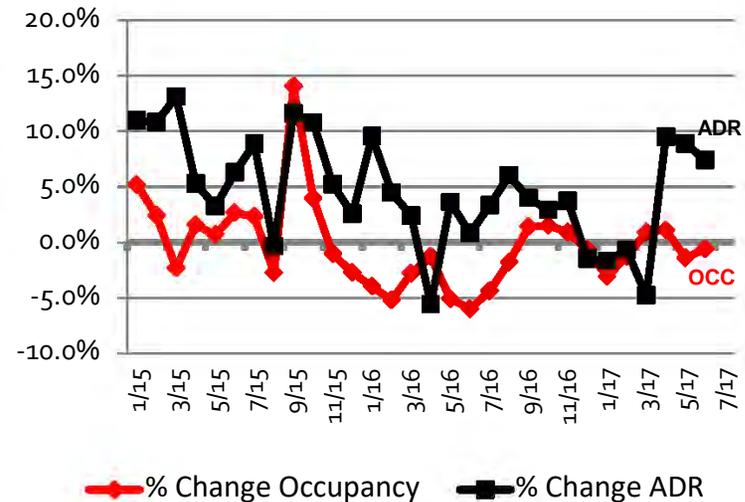
- This June, some **144,800** visitors stayed in Collier's commercial lodgings (+2.0%). Their visits contributed an estimated **\$146,727,800** of economic impact to the County (+5.9%). Key performance metrics are as follows:

	<u>June</u>	<u>2016</u>	<u>2017</u>	<u>% Δ</u>
Occupancy		65.9%	65.5%	-0.6%
ADR		\$174.4	\$187.3	+7.4%
RevPAR		\$114.9	\$122.7	+6.8%

Key Collier Visitation Metrics (%Δ)



Key Collier Visitation Metrics (%Δ)



- Compared to last June, nearly seven out of ten (**68.0%**) lodging managers report their three month forward reservations levels as "up" or the "same."

% of Properties (June)

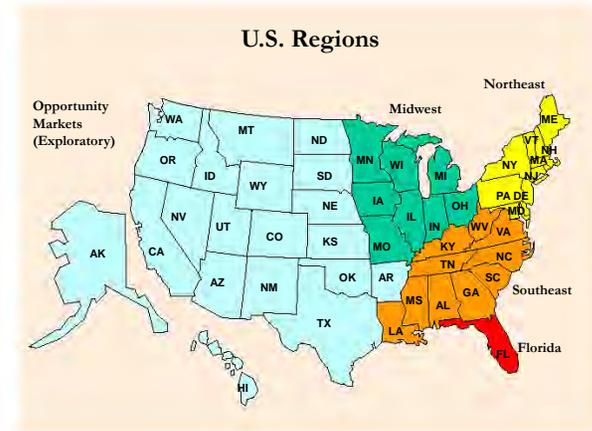
Reporting Reservations:

	<u>2016</u>	<u>2017</u>
Up	40.3%	36.2%
Same	33.3	31.8
Down	24.3	32.1

Naples, Marco Island, Everglades: June 2017 Summary

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

<u>June Visitation</u>	<u>2017 Visitor #</u>	<u>Δ</u>
Florida	71,821	+2.4%
Southeast	11,005	+10.7
Northeast	15,928	-13.7
Midwest	17,086	+6.5
Canada	2,606	+8.0
Europe	17,376	+5.5
West	8,978	+5.4
Total	144,800	+2.0%



4. This June, half of the destination's patrons flew (**2016: 52.1%; 2017: 49.6%**). A majority of these (**59.1%**) deplaned at RSW, with Miami capturing some **20.4%** of deplanements.
5. The typical June visitor party includes an average of **2.9** travelers who stay for **3.1** nights in the Naples, Marco Island, Everglades area.
6. Some **36.8%** of Collier's June visitors are in the destination for the first time (**2016: 39.9%**).
7. Fully **96.5%** consult the web for trip information, with some **82.4%** making bookings for their trip online.
8. The vast majority (**96.1%**) are satisfied with their Collier stay, with **90.5%** planning a future trip to the area.
9. This year, June visitors average **46.2** years of age (**2016: 46.6 years of age**).

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

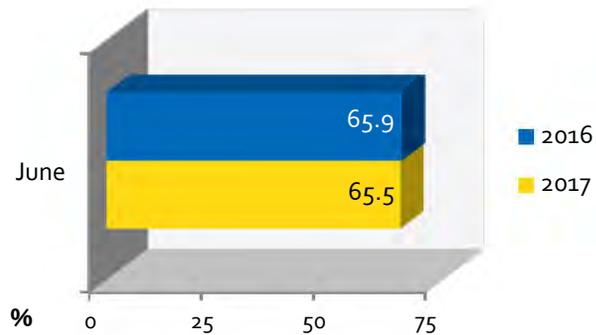


Naples, Marco Island, Everglades Visitor Profile | June 2017

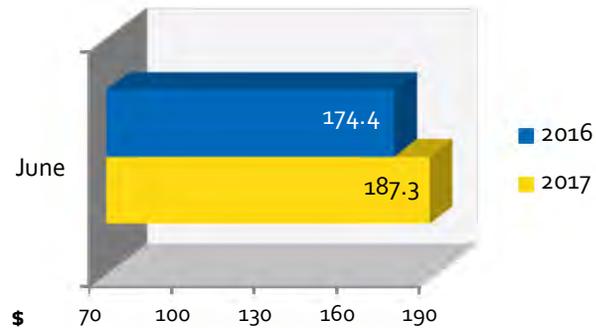
H/M/C* Visitor Statistics	Year to Date (January – June)			June		
	2016	2017	% Δ '16/'17	2016	2017	% Δ '16/'17
Visitors (#)	1,017,400	1,032,500	+1.5	142,000	144,800	+2.0
Room Nights	1,355,900	1,340,600	-1.1	177,000	179,800	+1.6
Direct Exp. (\$)	\$832,112,700	\$867,483,300	+4.3	\$92,966,000	\$98,409,000	+5.9
Total Eco. Impact (\$)	\$1,240,680,000	\$1,293,417,600	+4.3	\$138,612,300	\$146,727,800	+5.9

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

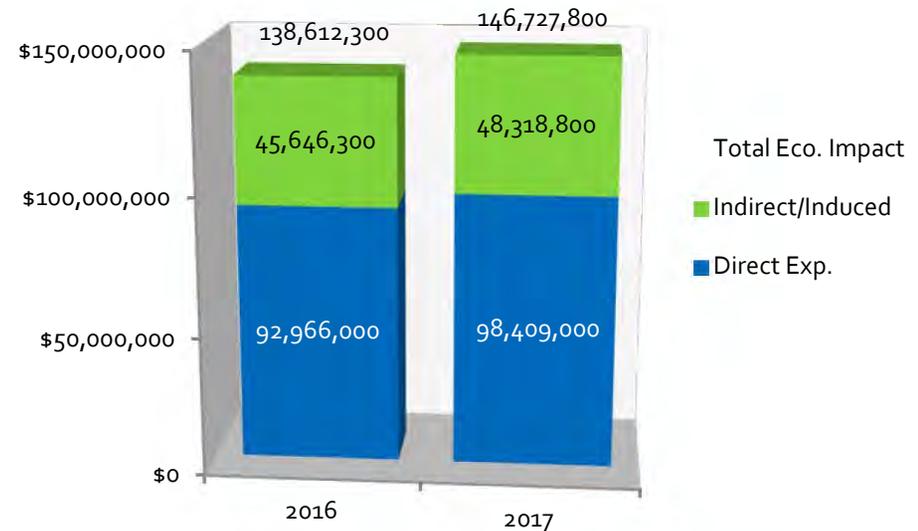
June Occupancy



June Room Rates



June Economic Impact



June

Lodging Statistics

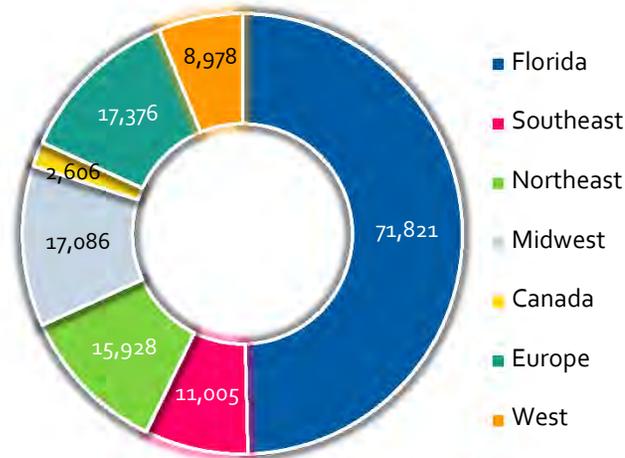
	2016	2017**	% Δ '16/'17
Occupancy	65.9%	65.5%	-0.6
Room Rates	\$174.4	\$187.3	+7.4
RevPAR	\$114.9	\$122.7	+6.8

** Note: 337 prime lodging units were closed for renovations

June 2017 Visitor Origin Markets

Visitor Origins	2016		2017		% Δ '16/'17
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	49.4%	70,148	49.6%	71,821	+2.4
Southeast	7.0	9,940	7.6	11,005	+10.7
Northeast	13.0	18,460	11.0	15,928	-13.7
Midwest	11.3	16,046	11.8	17,086	+6.5
Canada	1.7	2,414	1.8	2,606	+8.0
Europe	11.6	16,472	12.0	17,376	+5.5
West	6.0	8,520	6.2	8,978	+5.4
Total	100.0	142,000	100.0	144,800	+2.0

June 2017 Visitor Origins



Naples, Marco Island, Everglades Visitor Profile | June 2017

Transportation Mode (Multiple Response)	June 2016	June 2017
Plane	52.1%	49.6%
Rental Car	48.1	48.7
Personal Car	47.4	50.4

Airport Deplaned (Base: Flew)	June 2016	June 2017
Southwest Florida International	60.8%	59.1%
Miami International	18.0	20.4
Ft. Lauderdale International	7.1	9.6
Orlando International/Sanford	4.8	5.6
Tampa International	4.7	3.7

Purpose of Trip (Multiple Response)	June 2016	June 2017
Vacation/Weekend Getaway	82.7%	84.7%
Group Travel	22.0	21.3
Visit with Friends and Relatives	10.1	8.6
Special Event	8.9	5.9

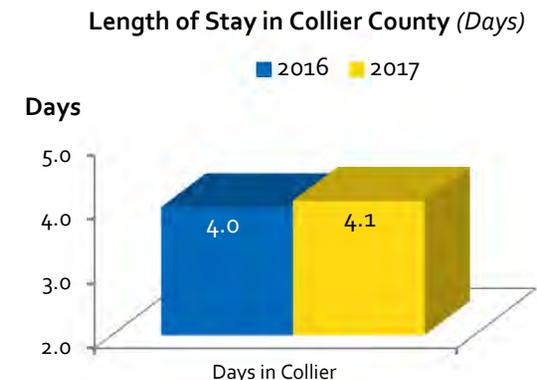
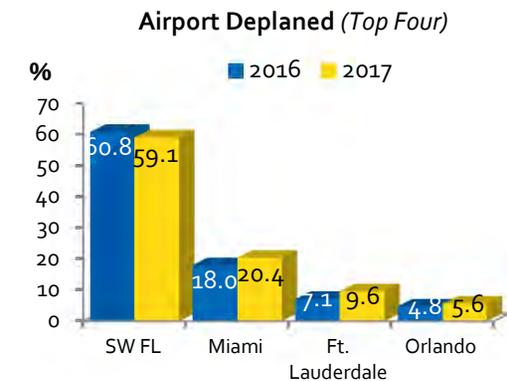
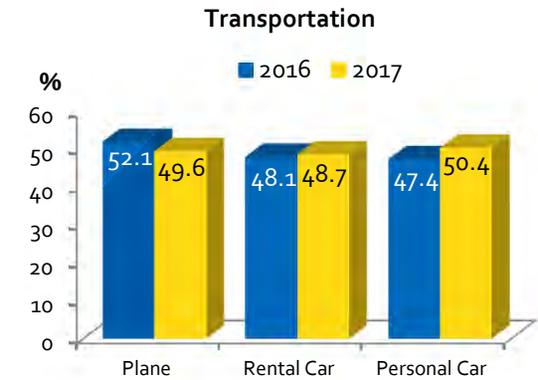
First Visit to (% yes)	June 2016	June 2017
Collier County	39.9%	36.8%
Florida	2.3	4.0

Length of Stay (Days)	June 2016	June 2017
In Collier County	4.0	4.1

Party Size	June 2016	June 2017
Number of People	2.8	2.9

Party Composition (Multiple Response)	June 2016	June 2017
Couple	49.5%	47.2%
Family	42.4	44.9
Single	9.2	8.2
Group of Friends	3.5	4.5

Did Party Have Lodging Reservations for Stay	June 2016	June 2017
% Yes	93.3%	95.2%

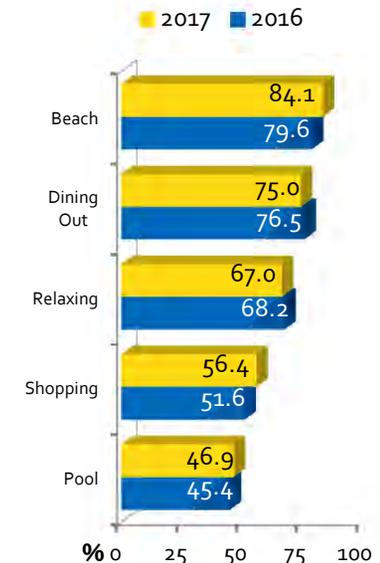


Satisfaction with Collier County	June 2016	June 2017
Very Satisfied	80.3%	78.8%
Satisfied	16.3	17.3
Satisfaction Level (Combined)	96.6%	96.1%



Activities Enjoyed in Area (Multiple Response)	June 2016	June 2017
Beach	79.6%	84.1%
Dining Out	76.5	75.0
Relaxing	68.2	67.0
Shopping	51.6	56.4
Pool	45.4	46.9
Sunsets	37.5	41.7
Sightseeing	31.7	32.5
Enjoying Nature/Bird Watching/Everglades	33.1	31.5
Sunning	26.7	29.7
Swimming	28.6	27.8
Walking	20.6	25.5
Reading	27.1	24.3
Bars/Nightlife	20.4	18.0
Boating	14.6	16.3
Art Galleries/Shows/Fairs	14.3	13.5
Visiting with Friends/Relatives	13.1	10.2
Golfing	8.7	7.3

Activities Enjoyed in Area (Top Five)

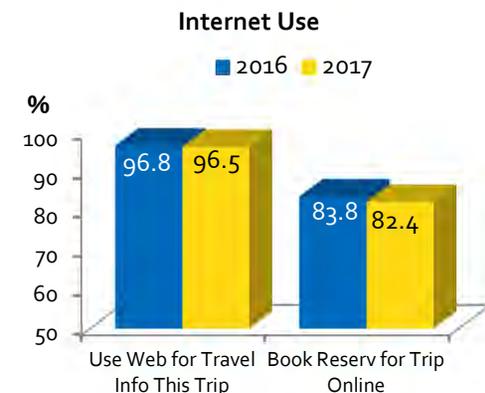
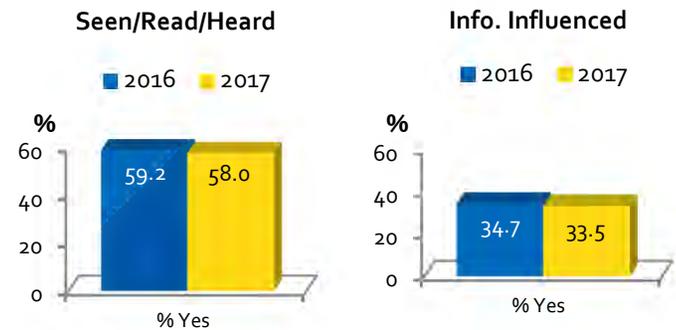
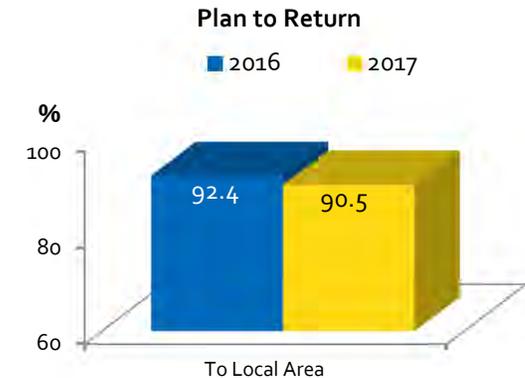


Expense Relative to Expectations	June 2016	June 2017
More Expensive	18.5%	19.3%
Less Expensive	3.1	2.3
As Expected	73.2	70.5

Demographics	June 2016	June 2017
Average Age Head of Household (Years)	46.6	46.2
Median Annual Household Income	\$139,097	\$142,754

Naples, Marco Island, Everglades Visitor Profile | June 2017

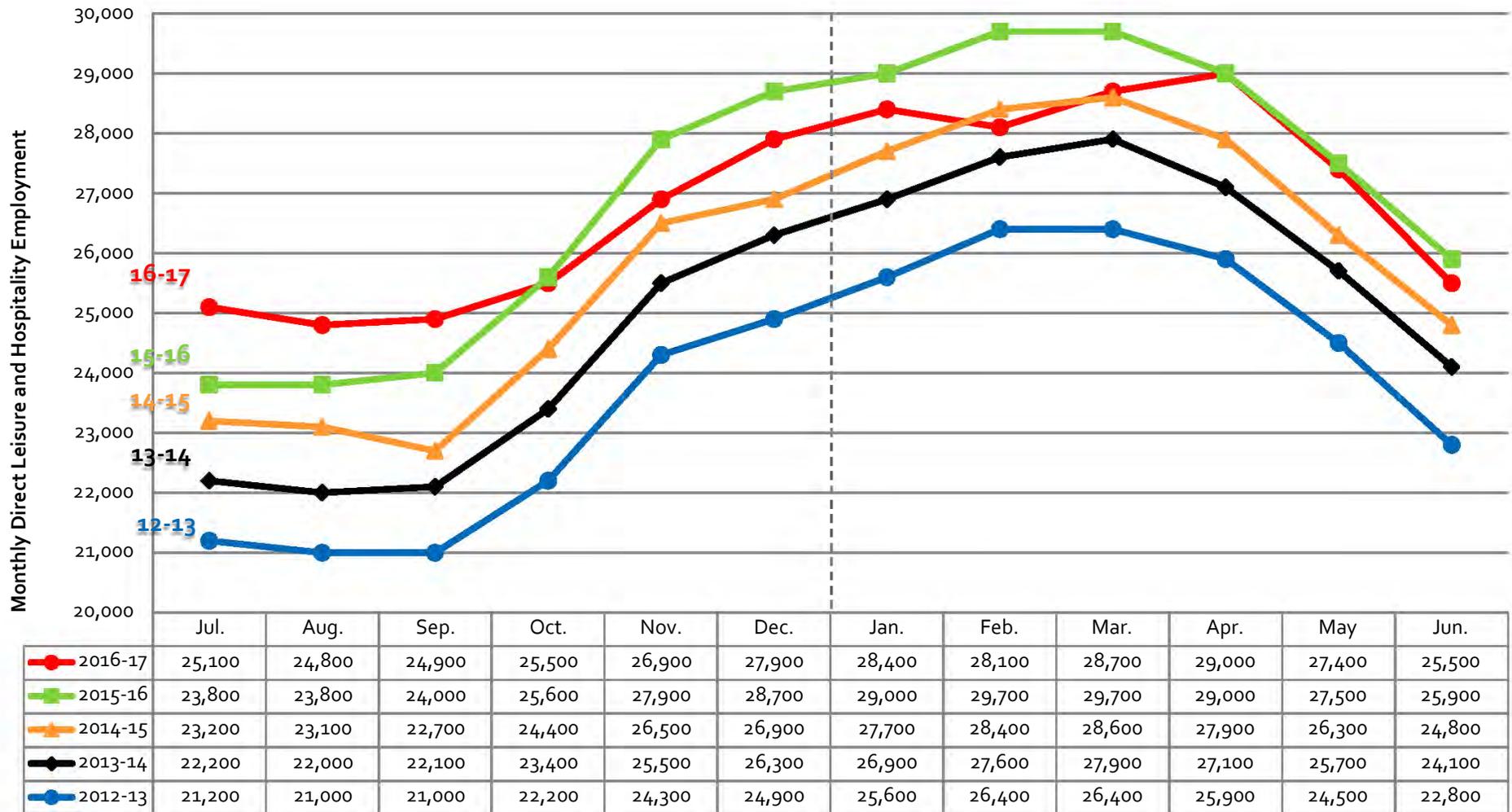
Recommend Collier to Friends/Relatives	June 2016	June 2017
% Yes	95.0%	93.2%
Plan to Return (% Yes)	June 2016	June 2017
To Local Area	92.4%	90.5%
Collier Base Budget	June 2016	June 2017
Total	\$1,833.13	\$1,970.90
Per Person/Stay	654.69	679.62
Per Person/Day	163.67	165.76
Area Information Seen/Read/Heard	June 2016	June 2017
% Yes	59.2%	58.0%
Directly Influenced by Information (Base: Seen/Read/Heard Area Information)	June 2016	June 2017
% Yes	34.7%	33.5%
Why Chose the Area (Multiple Response)	June 2016	June 2017
Beach Area	54.1%	58.0%
Previous Experience	40.4	40.9
Relaxing	36.5	39.1
Quiet/Peaceful/Laid Back	37.4	36.4
Weather	38.6	36.2
Quality of Accommodations	39.0	35.4
Not Crowded	29.3	31.8
Restaurants	30.3	29.3
Appealing Brochures/Websites	27.2	28.2
Outdoor Recreation/Nature	26.3	25.1
Recommendation	22.1	22.9
Never Been	22.7	21.6
Business/Meeting/Conference	20.9	19.0
Internet Use	June 2016	June 2017
Use Internet to Obtain Travel Info for This Trip (% Yes)	96.8%	96.5%
Book Reservations for Trip Online (%Yes)	83.8	82.4



Industry Data: *2012-2017*

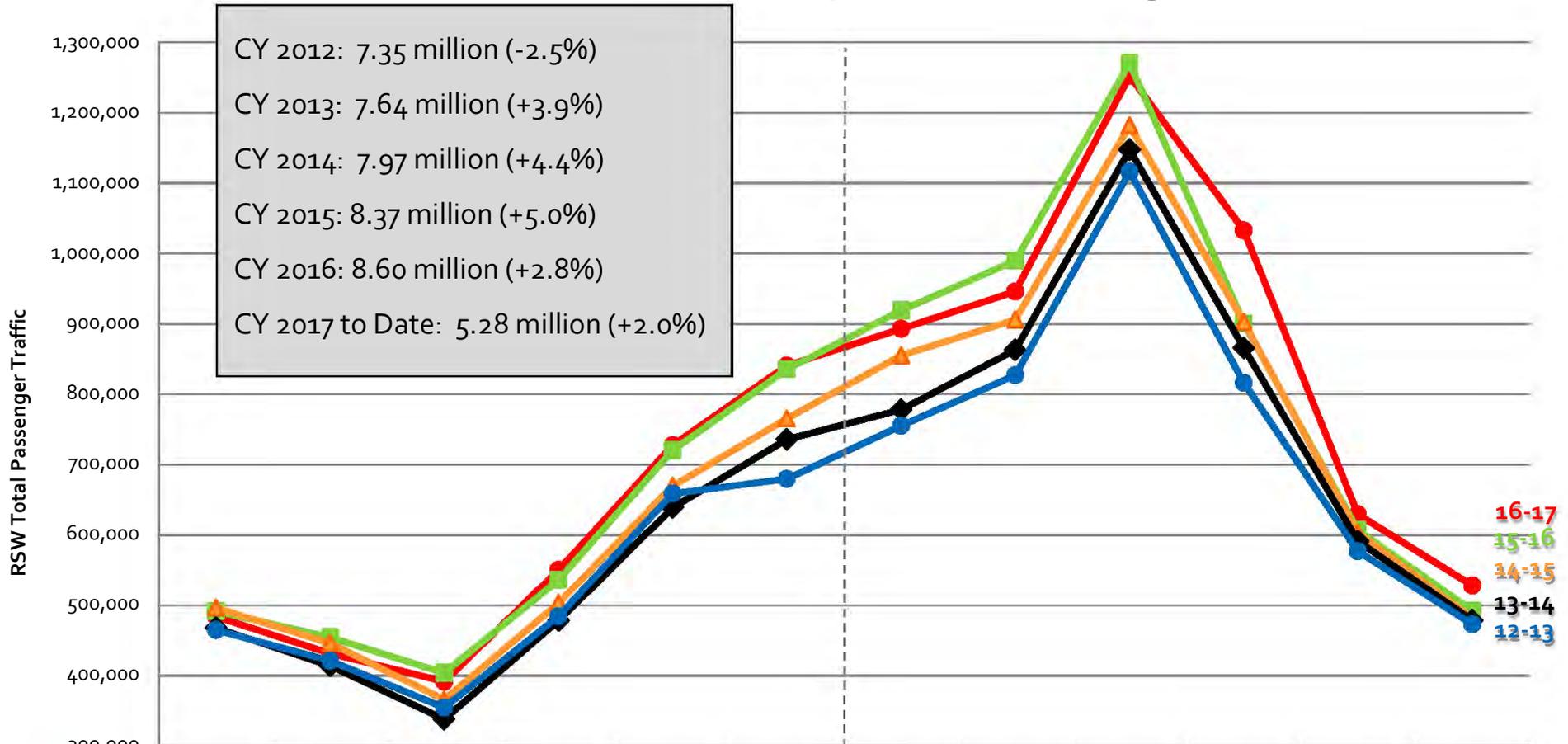


Collier Direct Leisure and Hospitality Employment (Calendar Year) *



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

Southwest Florida International Airport (RSW) Passenger Traffic



	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	Jun.
● 2016-17	484,074	431,729	391,844	550,316	727,634	840,501	892,905	946,079	1,252,124	1,032,783	629,321	528,383
■ 2015-16	492,114	454,360	404,045	535,921	720,556	835,359	918,929	989,845	1,269,961	900,594	606,833	492,413
▲ 2014-15	496,472	446,402	366,038	503,243	669,567	765,288	854,953	906,039	1,181,382	902,669	602,891	481,512
◆ 2013-14	467,946	414,303	338,175	478,376	639,047	735,739	778,163	862,899	1,147,059	865,554	591,116	478,692
● 2012-13	464,896	421,211	354,640	484,768	658,629	679,672	755,232	827,147	1,115,937	815,978	576,713	473,208