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Naples, Marco Island, Everglades Convention and Visitors Bureau August 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

September 2017

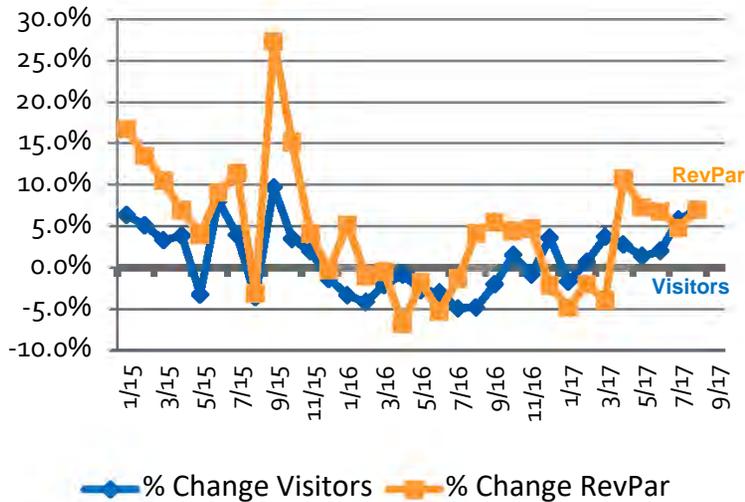
Naples, Marco Island, Everglades: August 2017 Summary

Executive Summary: August 2017

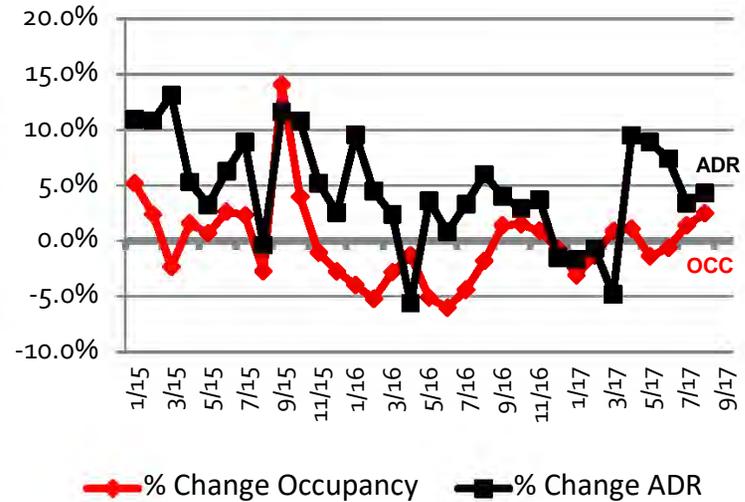
- This August, some **107,300** visitors stayed in Collier's commercial lodgings (+7.0%). Their visits contributed an estimated **\$90,394,300** of economic impact to the County (+9.9%). Key performance metrics are as follows:

<u>August</u>	<u>2016</u>	<u>2017</u>	<u>% Δ</u>
Occupancy	59.2%	60.7%	+2.5%
ADR	\$137.7	\$143.6	+4.3%
RevPAR	\$81.5	\$87.2	+7.0%

Key Collier Visitation Metrics (%Δ)



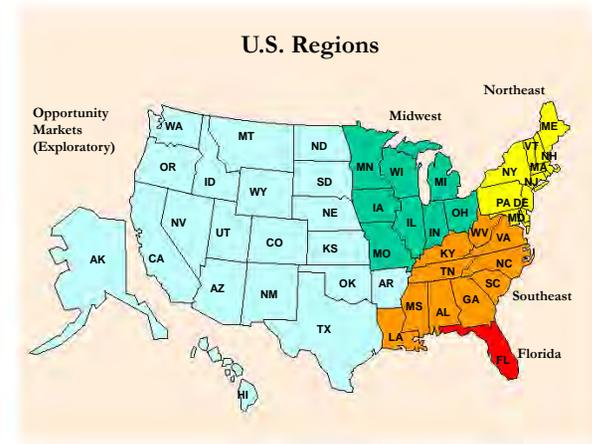
Key Collier Visitation Metrics (%Δ)



Naples, Marco Island, Everglades: August 2017 Summary

2. Collier's August visitation originates from the following primary market segments:

<u>August Visitation</u>	<u>2017 Visitor #</u>	<u>Δ</u>
Florida	53,006	+4.0%
Southeast	4,507	-8.3
Northeast	8,369	+11.2
Midwest	7,940	+11.5
Canada	1,073	+33.8
Europe	27,147	+9.6
West	5,258	+24.8
Total	107,300	+7.0%



3. This August, better than half of the destination's patrons flew (**2016: 55.4%; 2017: 57.3%**). A majority of these (**54.0%**) deplaned at RSW, with Miami capturing some **22.0%** of deplanements.
4. The typical August visitor party includes an average of **2.8** travelers who stay for **3.7** nights in the Naples, Marco Island, Everglades area.
5. Some **48.8%** of Collier's August visitors are in the destination for the first time (**2016: 49.4%**).
6. Fully **95.2%** consult the web for trip information, with some **82.8%** making bookings for their trip online.
7. The vast majority (**93.9%**) are satisfied with their Collier stay, with **94.9%** planning a future trip to the area.
8. This year, August visitors average **45.7** years of age (**2016: 46.6 years of age**).

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

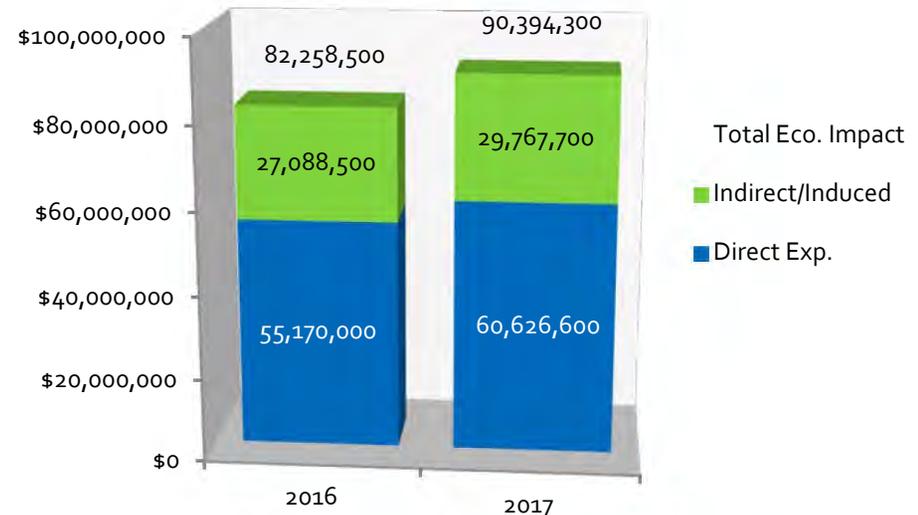
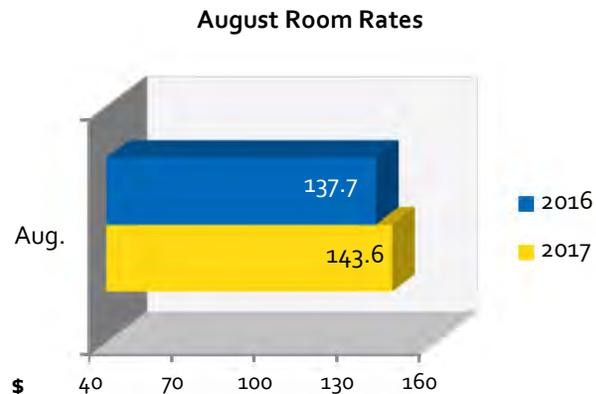
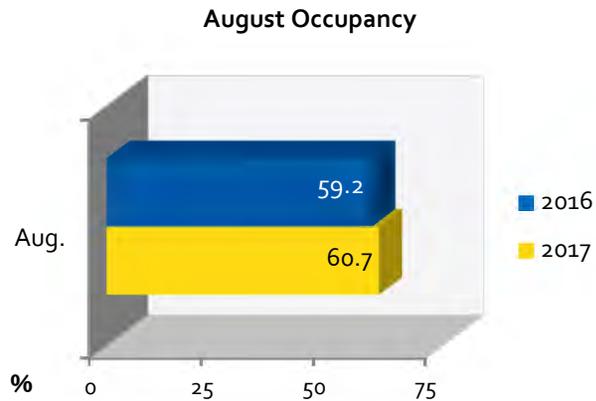


Naples, Marco Island, Everglades Visitor Profile | August 2017

H/M/C* Visitor Statistics	Year to Date (January – August)			August		
	2016	2017	% Δ '16/'17	2016	2017	% Δ '16/'17
Visitors (#)	1,245,500	1,275,000	+2.4	100,300	107,300	+7.0
Room Nights	1,681,900	1,678,100	-0.2	141,800	148,400	+4.7
Direct Exp. (\$)	\$966,297,600	\$1,014,963,700	+5.0	\$55,170,000	\$60,626,600	+9.9
Total Eco. Impact (\$)	\$1,440,749,700	\$1,513,310,900	+5.0	\$82,258,500	\$90,394,300	+9.9

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

August Economic Impact



August Lodging Statistics

Lodging Statistics	2016	2017**	% Δ '16/'17
Occupancy	59.2%	60.7%	+2.5
Room Rates	\$137.7	\$143.6	+4.3
RevPAR	\$81.5	\$87.2	+7.0

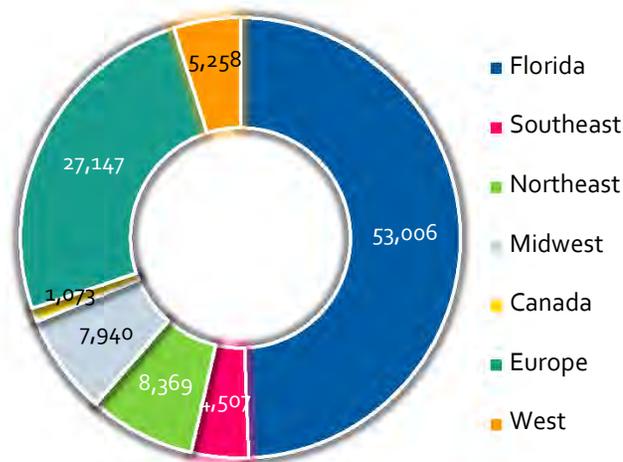
** Note: 337 prime lodging units were closed for renovations

Note: Statistics subject to revision based on data availability.

August 2017 Visitor Origin Markets

Visitor Origins	2016		2017		% Δ '16/'17
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	50.8%	50,952	49.4%	53,006	+4.0
Southeast	4.9	4,915	4.2	4,507	-8.3
Northeast	7.5	7,523	7.8	8,369	+11.2
Midwest	7.1	7,121	7.4	7,940	+11.5
Canada	0.8	802	1.0	1,073	+33.8
Europe	24.7	24,774	25.3	27,147	+9.6
West	4.2	4,213	4.9	5,258	+24.8
Total	100.0	100,300	100.0	107,300	+7.0

August 2017 Visitor Origins



Naples, Marco Island, Everglades Visitor Profile | August 2017

Transportation Mode (Multiple Response)	August 2016	August 2017
Plane	55.4%	57.3%
Rental Car	55.1	55.9
Personal Car	44.6	42.0

Airport Deplaned (Base: Flew)	August 2016	August 2017
Southwest Florida International	52.4%	54.0%
Miami International	23.0	22.0
Orlando International/Sanford	9.5	10.2
Ft. Lauderdale International	8.2	9.6
Tampa International	4.5	3.4

Purpose of Trip (Multiple Response)	August 2016	August 2017
Vacation/Weekend Getaway	81.6%	81.1%
Group Travel	12.1	16.6
Visit with Friends and Relatives	10.6	9.7
Special Event	7.1	5.8

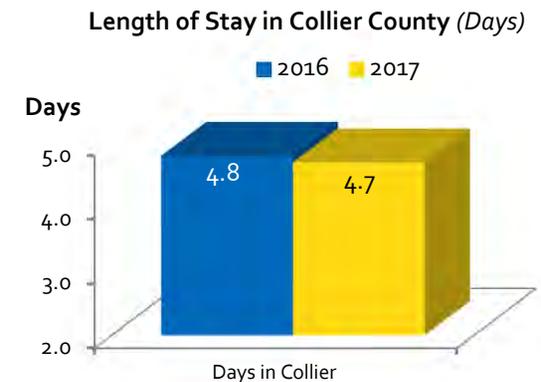
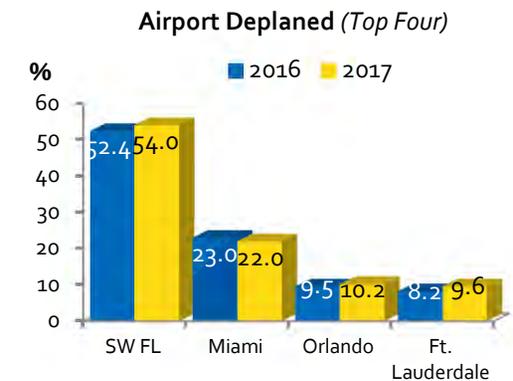
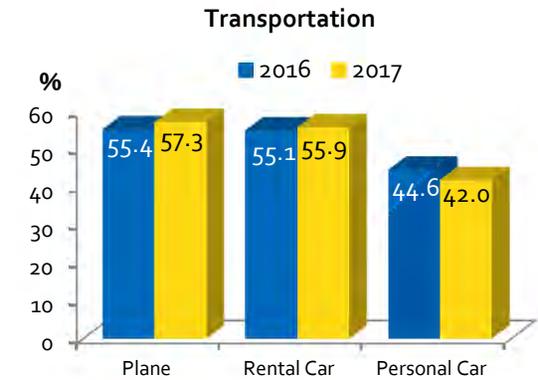
First Visit to (% yes)	August 2016	August 2017
Collier County	49.4%	48.8%
Florida	10.2	12.8

Length of Stay (Days)	August 2016	August 2017
In Collier County	4.8	4.7

Party Size	August 2016	August 2017
Number of People	2.7	2.8

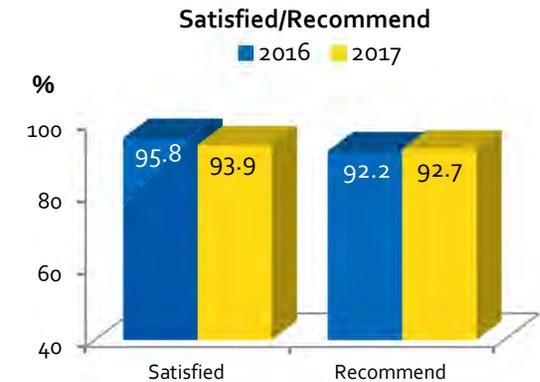
Party Composition (Multiple Response)	August 2016	August 2017
Couple	44.8%	43.0%
Family	38.6	40.2
Single	9.1	11.5
Group of Friends	2.5	3.4

Did Party Have Lodging Reservations for Stay	August 2016	August 2017
% Yes	95.7%	93.5%



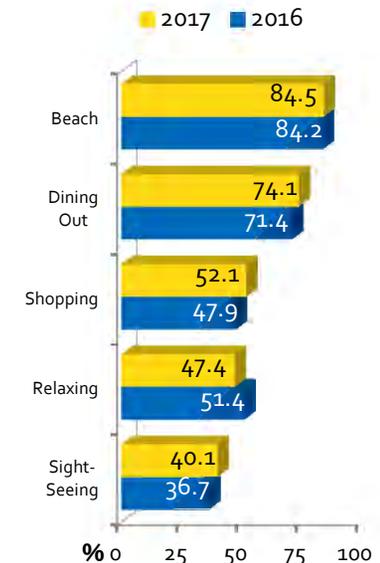
Naples, Marco Island, Everglades Visitor Profile | August 2017

Satisfaction with Collier County	August 2016	August 2017
Very Satisfied	84.1%	86.9%
Satisfied	11.7	7.0
Satisfaction Level (Combined)	95.8%	93.9%



Activities Enjoyed in Area (Multiple Response)	August 2016	August 2017
Beach	84.2%	84.5%
Dining Out	71.4	74.1
Shopping	47.9	52.1
Relaxing	51.4	47.4
Sightseeing	36.7	40.1
Pool	42.0	39.6
Sunsets	31.8	33.3
Walking	25.2	26.9
Sunning	24.3	26.7
Reading	29.1	26.2
Enjoying Nature/Bird Watching/Everglades	24.4	25.5
Swimming	22.8	23.7
Bars/Nightlife	15.0	16.6
Shelling	17.6	15.3
Visiting with Friends/Relatives	14.3	13.8
Fishing	10.7	11.8
Art Galleries/Shows/Fairs	9.2	10.9
Boating	11.1	9.5
Golfing	6.0	6.9

Activities Enjoyed in Area (Top Five)

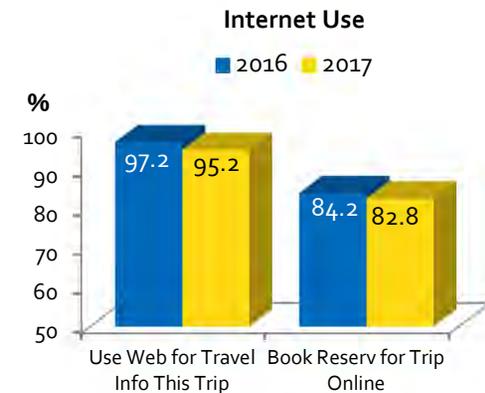
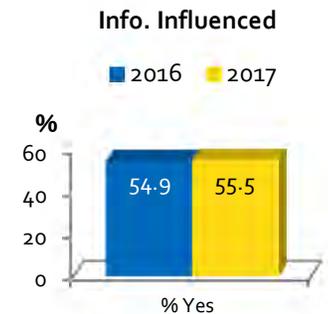
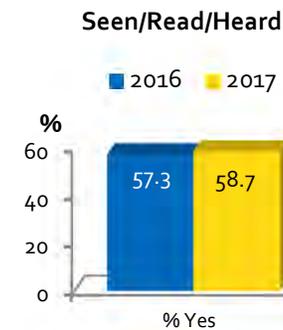
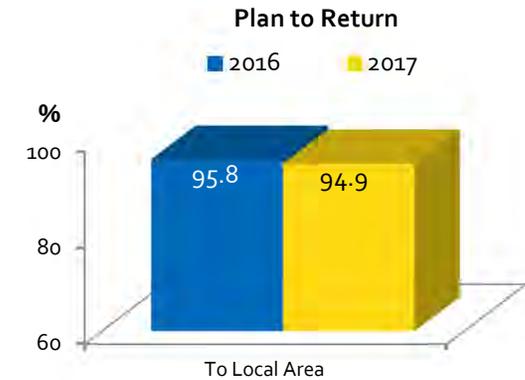


Expense Relative to Expectations	August 2016	August 2017
More Expensive	22.6%	23.8%
Less Expensive	2.6	3.4
As Expected	73.4	71.4

Demographics	August 2016	August 2017
Average Age Head of Household (Years)	46.6	45.7
Median Annual Household Income	\$147,182	\$153,400

Naples, Marco Island, Everglades Visitor Profile | August 2017

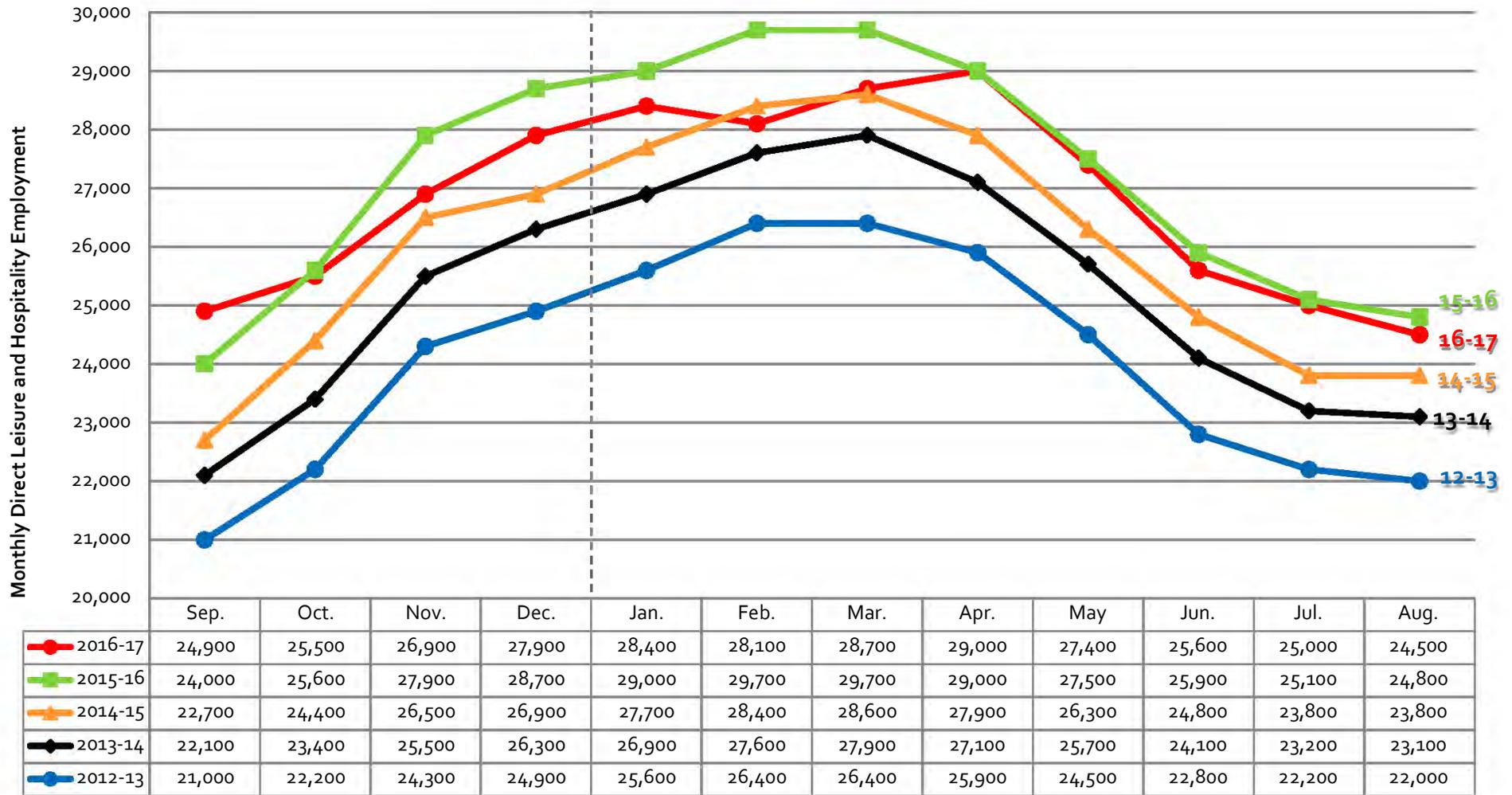
Recommend Collier to Friends/Relatives	August 2016	August 2017
% Yes	92.2%	92.7%
Plan to Return (% Yes)	August 2016	August 2017
To Local Area	95.8%	94.9%
Collier Base Budget	August 2016	August 2017
Total	\$1,485.13	\$1,582.05
Per Person/Stay	550.05	565.02
Per Person/Day	114.59	120.22
Area Information Seen/Read/Heard	August 2016	August 2017
% Yes	57.3%	58.7%
Directly Influenced by Information (Base: Seen/Read/Heard Area Information)	August 2016	August 2017
% Yes	54.9%	55.5%
Why Chose the Area (Multiple Response)	August 2016	August 2017
Beach Area	55.6%	58.8%
Quiet/Peaceful/Laid Back	45.9	43.6
Quality of Accommodations	45.6	42.2
Previous Experience	35.2	32.9
Restaurants	26.0	29.8
Relaxing	32.7	29.2
Not Crowded	31.6	27.5
Outdoor Recreation/Nature	28.6	26.6
Never Been	27.4	25.9
Weather	28.0	24.9
Recommendation	25.3	23.5
Appealing Brochures/Websites	23.8	22.7
Business/Meeting/Conference	12.1	13.1
Internet Use	August 2016	August 2017
Use Internet to Obtain Travel Info for This Trip (% Yes)	97.2%	95.2%
Book Reservations for Trip Online (%Yes)	84.2	82.8



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

