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

www.ResearchDataLLC.com

January 2019

Naples, Marco Island, Everglades: December 2018 Summary

Executive Summary: December 2018

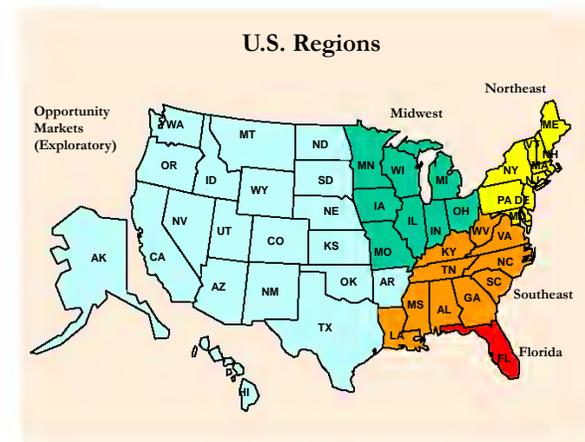
- This December, some **170,700** visitors stayed in Collier's commercial lodgings **(+8.2%)***. Their visits contributed an estimated **\$220,622,700** of economic impact to the County **(+10.6%)**. Key performance metrics are as follows:

<u>December</u>	<u>2017</u>	<u>2018**</u>	<u>% Δ</u>
Occupancy	79.3%	74.7%	-5.8%
ADR	\$243.2	\$253.0	+4.0%
RevPAR	\$192.9	\$189.0	-2.0%

* Available records suggest that approximately 90 Collier lodging units remained closed in December 2018. (December 2017: 800 units)
 Additionally, approximately 125 new units were added to Collier's rental pool since last December.

- Collier's December visitation originates from the following primary market segments:

<u>December Visitation</u>	<u>2018</u> <u>Visitor #</u>	<u>Δ</u>
Florida	65,720	+2.6
Southeast	12,461	+16.1
Northeast	23,727	+34.3
Midwest	27,312	+11.7
Canada	4,950	-2.0
Europe	26,971	-0.6
Other	9,559	+10.1
Total	170,700	+8.2



Naples, Marco Island, Everglades: December 2018 Summary

3. Compared to last December, over half (**54.5%**) of Collier lodging managers report their three month forward reservations levels as “up” (**2017: 51.5%**).

% of Properties (December)		
<u>Reporting Reservations:</u>	<u>2017</u>	<u>2018</u>
Up	51.5%	54.5%
Same	36.4	20.6
Down	12.1	24.9

4. This December, three out of five of the destination’s visitor parties flew (**2017: 62.6%; 2018: 63.1%**). A majority of these (**65.8%**) deplaned at RSW, with Miami capturing some **19.8%** of deplanements.
5. This December, visitor party size averaged **2.8** travelers who stayed for **3.1 nights** in the Naples, Marco Island, Everglades area. (**2017: 2.7 people; 3.2 nights**).
6. Some **37.7%** of Collier’s December visitors are in the destination for the first time.
7. Fully **94.8%** consult the web for trip information, with some **78.2%** making bookings for their trip online.
8. The majority (**97.3%**) are satisfied with their Collier stay, with **93.5%** planning a future trip to the area.
9. The typical December visitor is **50.1 years of age** (**2017: 49.5 years**).

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

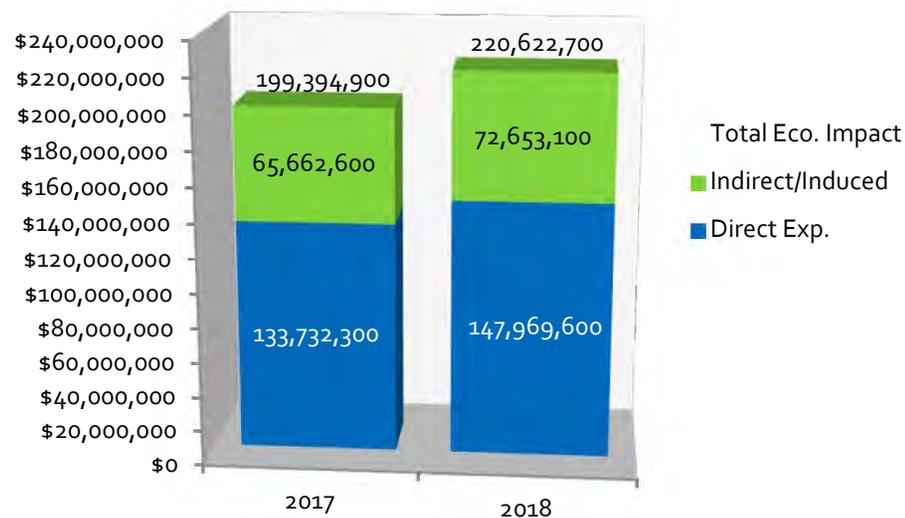
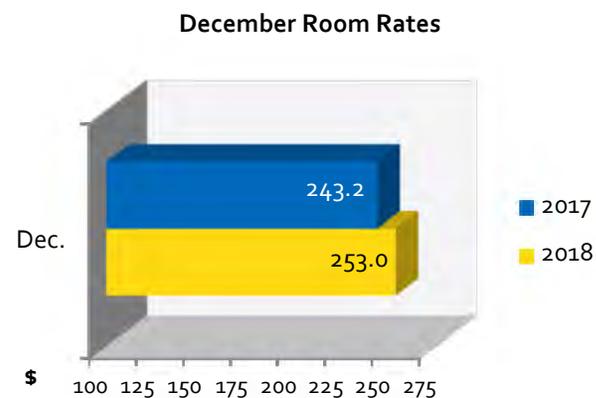
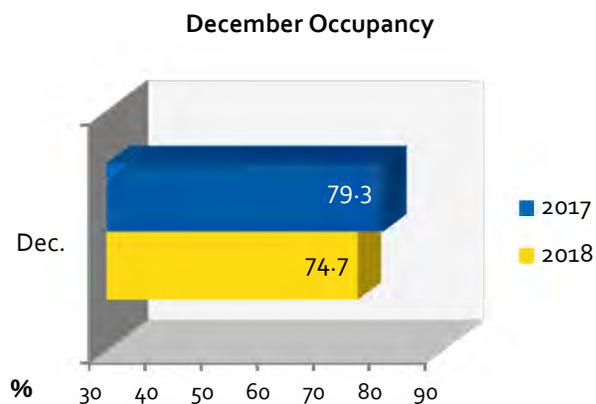


Naples, Marco Island, Everglades Visitor Profile | December 2018

H/M/C+ Visitor Statistics	Calendar Year (January – December)			December		
	2017	2018	% Δ '17/'18	2017	2018*	% Δ '17/'18
Visitors (#)	1,774,800	1,823,300	+2.7	157,800	170,700	+8.2
Room Nights	2,364,300	2,380,700	+0.7	199,300	203,800	+2.3
Direct Exp. (\$)	\$1,373,918,000	\$1,436,686,500	+4.6	\$133,732,300	\$147,969,600	+10.6
Total Eco. Impact (\$)	\$2,048,511,800	\$2,142,099,700	+4.6	\$199,394,900	\$220,622,700	+10.6

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

December Economic Impact



December

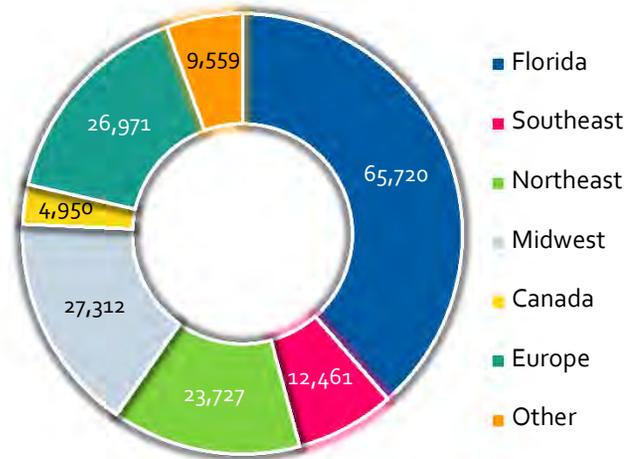
Lodging Statistics	2017	2018**	% Δ '17/'18
Occupancy	79.3%	74.7%	-5.8
Room Rates	243.2	\$253.0	+4.0
RevPAR	192.9	\$189.0	-2.0

** Note: Available records suggest that approximately 90 Collier lodging units remained closed in December 2018. (December 2017: 800 units). Additionally, approximately 125 new units were added to Collier's rental pool since last December.

December 2018 Visitor Origin Markets

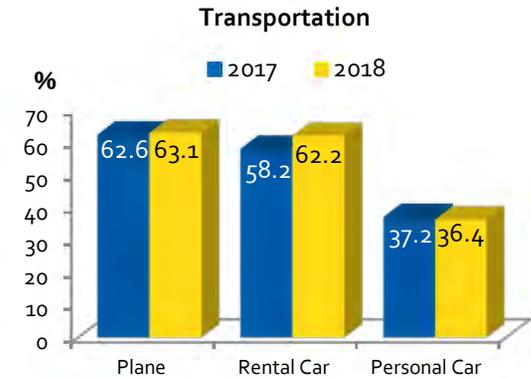
Visitor Origins	2017		2018		% Δ '17/'18
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	40.6%	64,067	38.5%	65,720	+2.6
Southeast	6.8	10,730	7.3	12,461	+16.1
Northeast	11.2	17,673	13.9	23,727	+34.3
Midwest	15.5	24,459	16.0	27,312	+11.7
Canada	3.2	5,050	2.9	4,950	-2.0
Europe	17.2	27,142	15.8	26,971	-0.6
Other	5.5	8,679	5.6	9,559	+10.1
Total	100.0	157,800	100.0	170,700	+8.2

December 2018 Visitor Origins

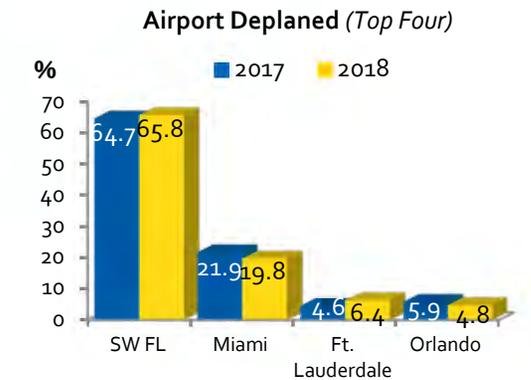


Naples, Marco Island, Everglades Visitor Profile | December 2018

Transportation Mode (Multiple Response)	December 2017	December 2018	
Plane	62.6%	63.1%	↑
Rental Car	58.2	62.2	↑
Personal Car	37.2	36.4	↓



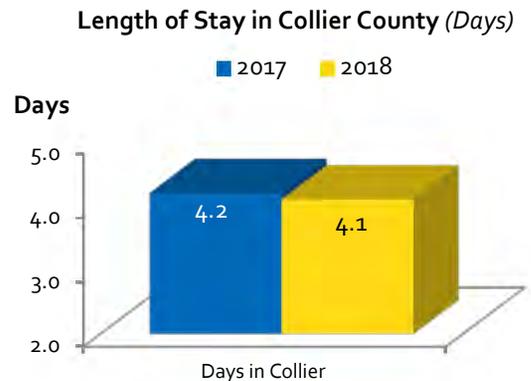
Airport Deplanned (Base: Flew)	December 2017	December 2018	
Southwest Florida International	64.7%	65.8%	↑
Miami International	21.9	19.8	↓
Ft. Lauderdale International	4.6	6.4	↑
Orlando International/Sanford	5.9	4.8	↓



Purpose of Trip (Multiple Response)	December 2017	December 2018	
Vacation/Weekend Getaway	80.7%	84.9%	↑
Group Travel	29.0	27.3	↓
Visit with Friends and Relatives	16.2	17.2	↑
Special Event	5.8	7.4	↑

First Visit to (% yes)	December 2017	December 2018	
Collier County	35.1%	37.7%	↑
Florida	4.3	3.5	↓

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



Party Size	December 2017	December 2018	
Number of People	2.7	2.8	↑

Naples, Marco Island, Everglades Visitor Profile | December 2018

Party Composition <i>(Multiple Response)</i>	December 2017	December 2018	
Couple	56.4%	57.3%	↑
Family	29.0	30.4	↑
Single	13.0	10.0	↓
Business Associates	11.0	8.1	↓
Group of Friends	3.9	5.7	↑

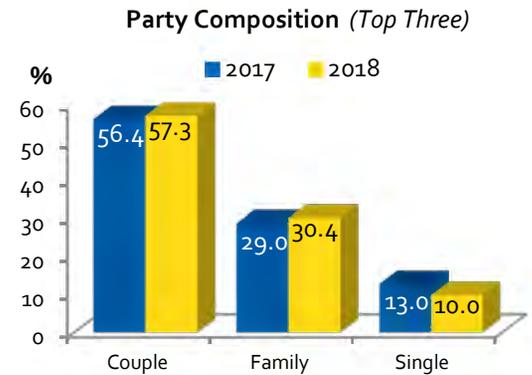
Did Party Have Lodging Reservations for Stay	December 2017	December 2018	
% Yes	97.5%	98.4%	↑

Expense Relative to Expectations	December 2017	December 2018	
More Expensive	18.8%	14.6%	↓
Less Expensive	8.3	5.9	↓
As Expected	69.0	75.0	↑

Satisfaction with Collier County	December 2017	December 2018	
Very Satisfied	80.8%	83.5%	↑
Satisfied	15.5	13.8	↓
Satisfaction Level (Combined)	96.3%	97.3%	↑

Recommend Collier to Friends/Relatives	December 2017	December 2018	
% Yes	94.4%	95.5%	↑

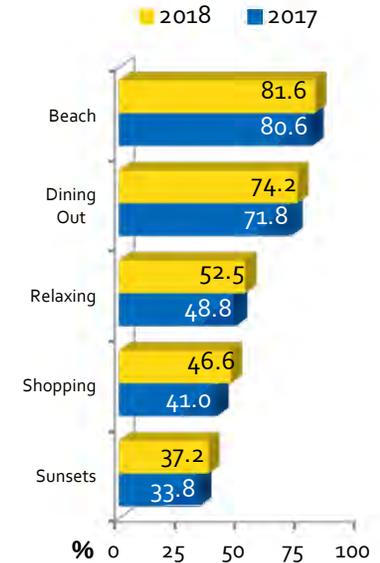
Plan to Return (% Yes)	December 2017	December 2018	
To Local Area	92.6%	93.5%	↑



Naples, Marco Island, Everglades Visitor Profile | December 2018

Activities Enjoyed in Area (Multiple Response)	December 2017	December 2018	
Beach	80.6%	81.6%	↑
Dining Out	71.8	74.2	↑
Relaxing	48.8	52.5	↑
Shopping	41.0	46.6	↑
Sunsets	33.8	37.2	↑
Pool	33.3	35.7	↑
Art Galleries/Shows/Fairs	23.5	25.7	↑
Walking	24.0	25.1	↑
Visiting with Friends/Relatives	21.8	23.5	↑
Reading	18.5	18.9	↑
Sightseeing	21.9	18.7	↓
Sunning	20.1	18.4	↓
Enjoying Nature/Bird Watching/Everglades	18.3	16.0	↓
Bars/Nightlife	12.9	14.0	↑
Swimming	13.6	12.5	↓
Golfing	10.8	11.1	↑

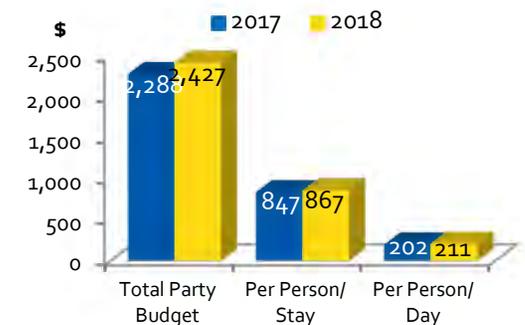
Activities Enjoyed in Area (Top Five)



Demographics	December 2017	December 2018	
Average Age Head of Household (Years)	49.5	50.1	↑
Median Annual Household Income	\$162,384	\$164,175	↑

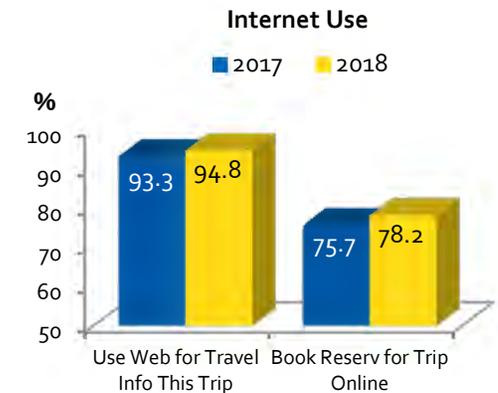
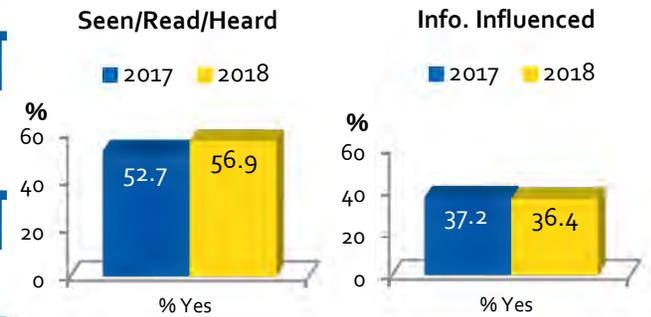
Collier Base Budget	December 2017	December 2018	
Total	\$2,288.19	\$2,427.15	↑
Per Person/Stay	847.48	866.84	↑
Per Person/Day	201.78	211.42	↑

Collier Base Budgets



Naples, Marco Island, Everglades Visitor Profile | December 2018

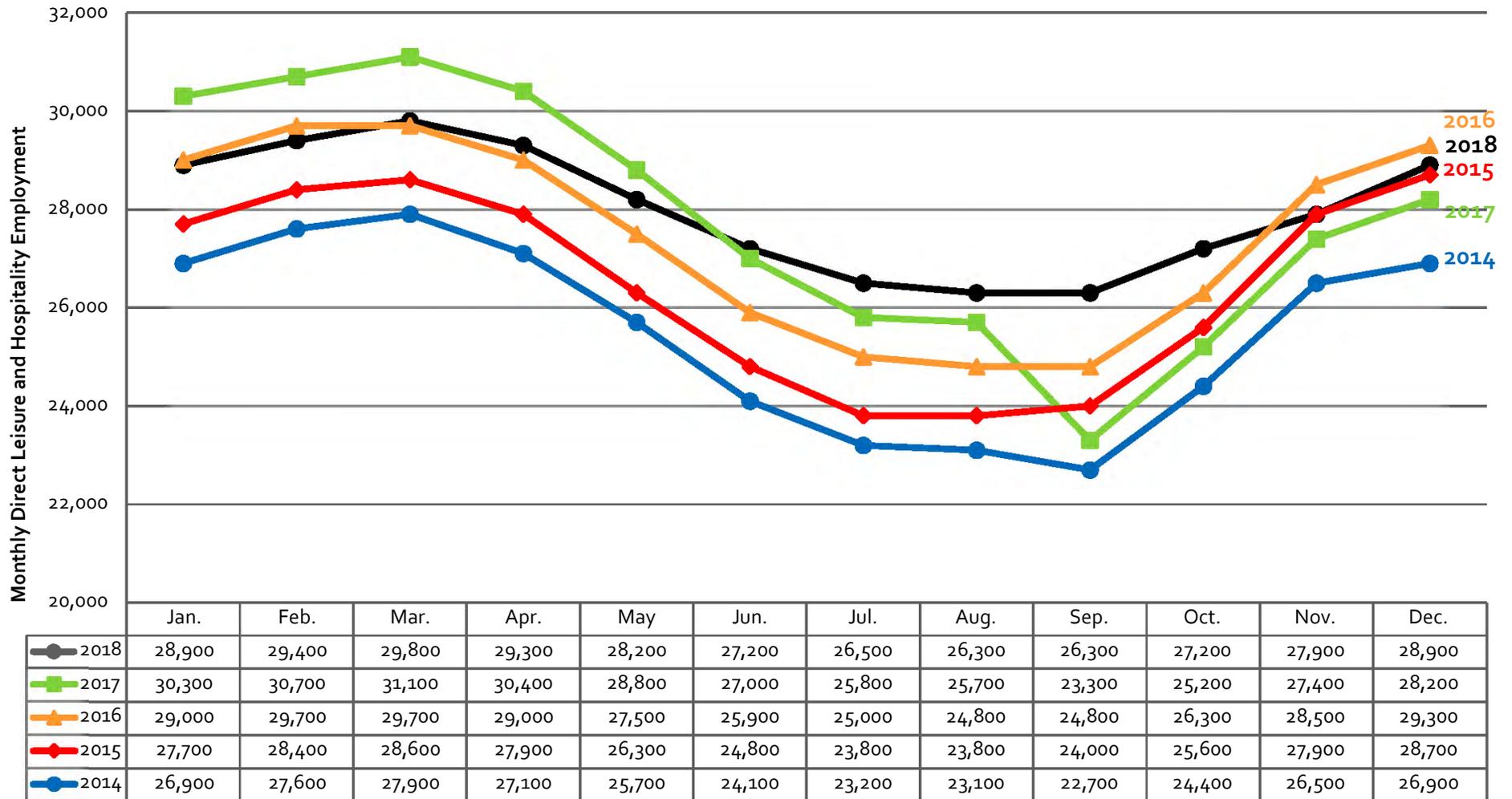
Area Information Seen/Read/Heard	December 2017	December 2018	
% Yes	52.7%	56.9%	↑
Directly Influenced by Information (Base: Seen/Read/Heard Area Information)			
	December 2017	December 2018	
% Yes	37.2%	36.4%	↓
Why Chose the Area (Multiple Response)			
	December 2017	December 2018	
Beach Area	59.5%	57.5%	↓
Relaxing	43.5	49.9	↑
Weather	51.4	49.1	↓
Quiet/Peaceful/Laid Back	35.4	38.3	↑
Previous Experience	38.2	36.7	↓
Quality of Accommodations	32.4	34.6	↑
Restaurants	32.4	34.4	↑
Never Been	29.7	30.5	↑
Outdoor Recreation/Nature	31.1	29.8	↓
Not Crowded	24.3	29.5	↑
Business/Meeting/Conference	27.6	26.6	↓
Appealing Brochures/Websites	23.6	24.2	↑
Recommendation	25.4	22.2	↓
Internet Use			
	December 2017	December 2018	
Use Internet to Obtain Travel Info for This Trip (% Yes)	93.3%	94.8%	↑
Book Reservations for Trip Online (%Yes)	75.7	78.2	↑



Industry Data: *2014-2018*

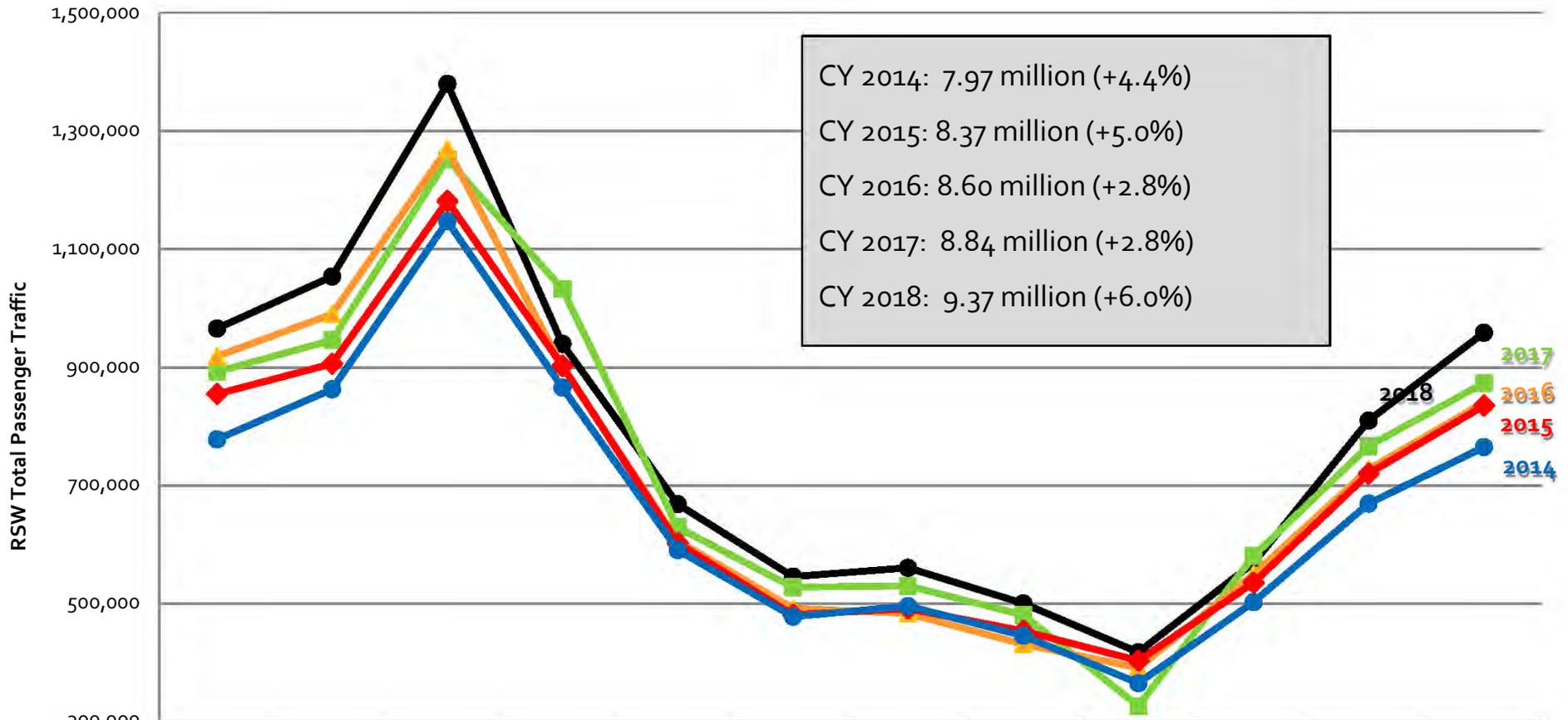


Collier Direct Leisure and Hospitality Employment (Calendar Year) *



* 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	501,023	418,256	569,553	810,283	958,717
■ 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