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

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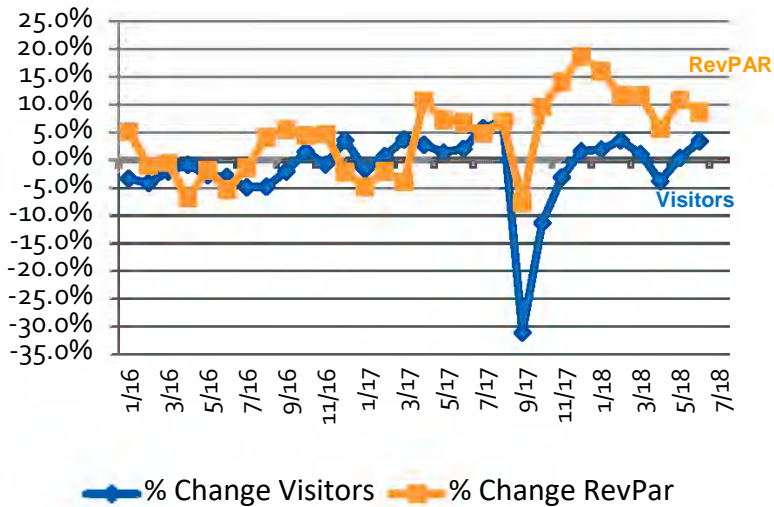
July 2018

Executive Summary: *June 2018*

1. This June, some **149,700** visitors stayed in Collier's commercial lodgings **(+3.4%)***. Their visits contributed an estimated **$154,858,100** of economic impact to the County **(+5.5%)**. Key performance metrics are as follows:

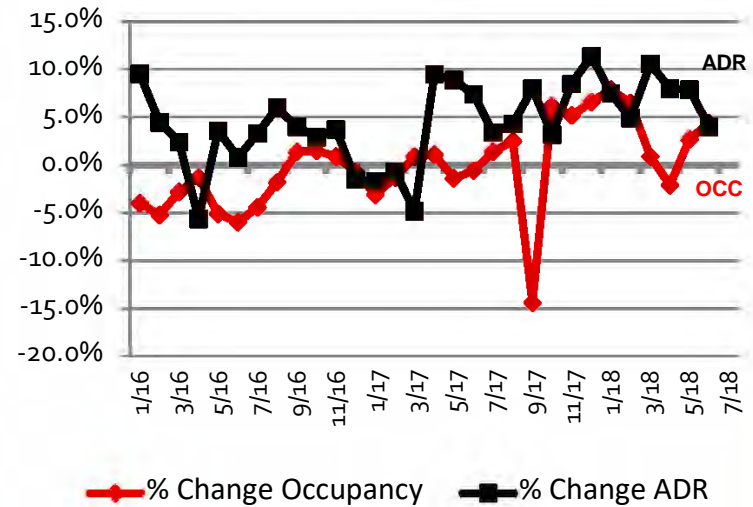| June	2017	2018**	% Δ
Occupancy	65.5%	68.4%	+4.4%
ADR	$187.3	$194.7	+4.0%
RevPAR	$122.7	$133.2	+8.6%

* As of June 2018, approximately 634 lodging units remain closed due to the impact of Hurricane Irma and restorations.

** Based on units available to be rented.

Key Collier Visitation Metrics *(%Δ)*

Key Collier Visitation Metrics *(%Δ)*

2. Compared to last June, nearly half (**42.0%**) of Collier lodging managers report their three month forward reservations levels as "up."

% of Properties (June)

Reporting Reservations:	2017	2018
Up	36.2%	42.0%
Same	31.8	40.9
Down	32.1	17.1

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

June Visitation	2018 Visitor #	Δ
Florida	74,700	+4.0%
Southeast	10,928	-0.7
Northeast	17,216	+8.1
Midwest	16,467	-3.6
Canada	1,946	-25.3
Europe	19,012	+9.4
Other	9,431	+5.0
Total	**149,700**	**+3.4%**

U.S. Regions

4. This June, over half of the destination's visitor parties flew *(2017: 49.6%; 2018: 52.9%).* A majority of these (**60.4%**) deplaned at RSW, with Miami capturing some **19.1%** of deplanements.

5. This June, visitor party size averaged **2.8** travelers who stayed for **3.0 nights** in the Naples, Marco Island, Everglades area *(2017: 2.9 people; 3.1 nights)*.

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6. Some **35.6%** of Collier's June visitors are in the destination for the first time.

7. Fully **96.9%** consult the web for trip information, with some **83.7%** making bookings for their trip online.

8. The vast majority **(94.5%)** are satisfied with their Collier stay, with **90.0%** planning a future trip to the area.

9. The typical June visitor is **47.5 years of age** *(2017: 46.2 years).*

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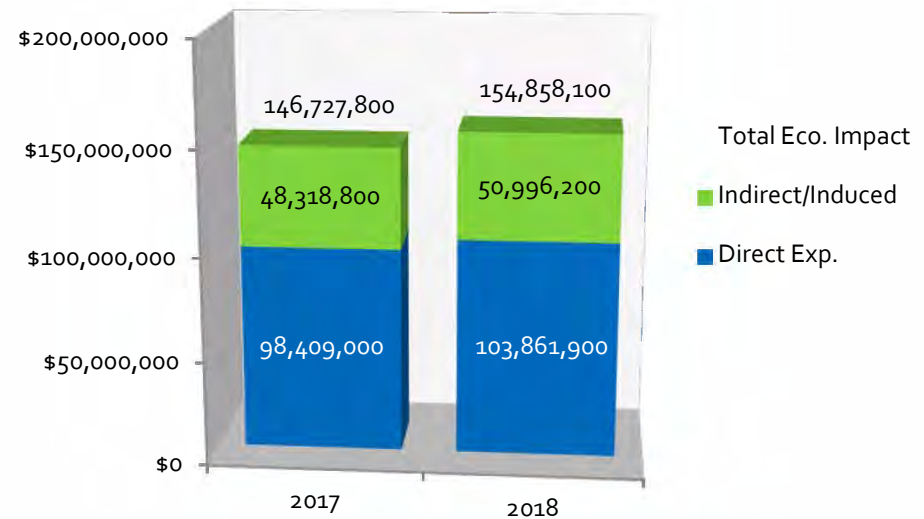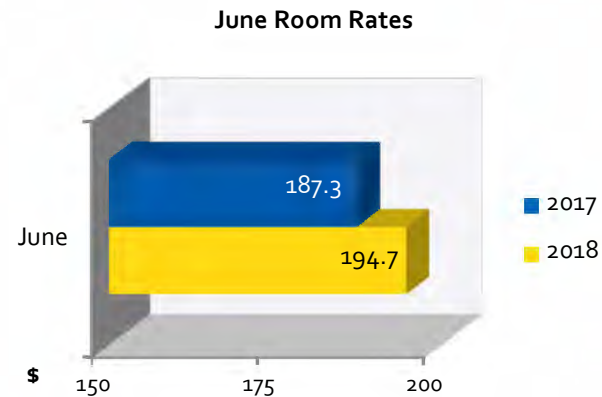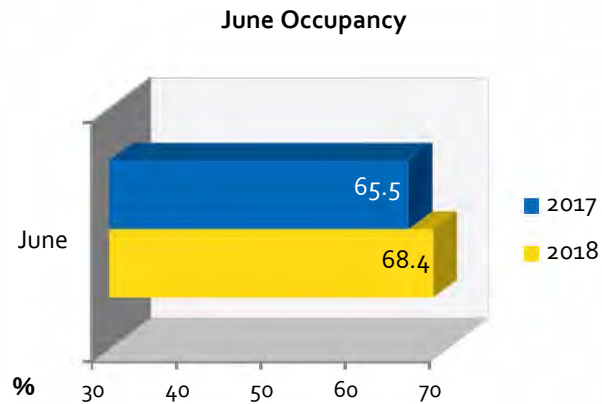
Naples, Marco Island, Everglades:

June 2018 Visitor Profile

Naples, Marco Island, Everglades Visitor Profile | June 2018

H/M/C+ Visitor Statistics	Year to Date (January – June)		% Δ	June		% Δ
	2017	2018	'17/'18	2017	2018*	'17/'18
Visitors (#)	1,032,500	1,045,500	+1.3	144,800	149,700	+3.4
Room Nights	1,340,600	1,328,800	-0.9	179,800	185,500	+3.2
Direct Exp. ($)	$867,483,300	$903,689,500	+4.2	$98,409,000	$103,861,900	+5.5
Total Eco. Impact ($)	$1,293,417,600	$1,347,401,100	+4.2	$146,727,800	$154,858,100	+5.5

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

June Occupancy

(June: 2017 = 65.5, 2018 = 68.4) %

June Room Rates

(June: 2017 = 187.3, 2018 = 194.7) $

June Economic Impact

Total Eco. Impact

	2017	2018
Total Eco. Impact	146,727,800	154,858,100
Indirect/Induced	48,318,800	50,996,200
Direct Exp.	98,409,000	103,861,900

June

| Lodging Statistics	2017	2018**	% Δ '17/'18
Occupancy	65.5%	68.4%	+4.4
Room Rates	$187.3	$194.7	+4.0
RevPAR	$122.7	$133.2	+8.6

* As of June 2018, approximately 634 units remain closed due to the impact of Hurricane Irma and restorations.
** Based on units available to be rented.

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Naples, Marco Island, Everglades Visitor Profile | June 2018

June 2018 Visitor Origin Markets

Visitor Origins	2017		2018		
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	% Δ '17/'18
Florida	49.6%	71,821	49.9%	74,700	+4.0
Southeast	7.6	11,005	7.3	10,928	-0.7
Northeast	11.0	15,928	11.5	17,216	+8.1
Midwest	11.8	17,086	11.0	16,467	-3.6
Canada	1.8	2,606	1.3	1,946	-25.3
Europe	12.0	17,376	12.7	19,012	+9.4
Other	6.2	8,978	6.3	9,431	+5.0
Total	**100.0**	**144,800**	**100.0**	**149,700**	**+3.4**

June 2018 Visitor Origins

- Florida
- Southeast
- Northeast
- Midwest
- Canada
- Europe
- Other
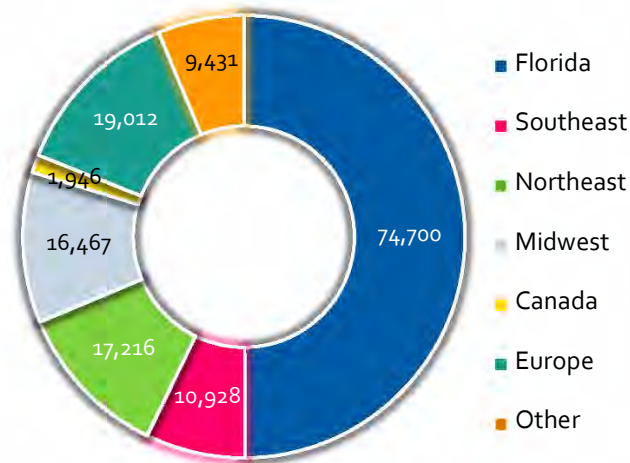
Naples, Marco Island, Everglades Visitor Profile | June 2018

Transportation Mode *(Multiple Response)*

	June 2017	June 2018	
Plane	49.6%	52.9%	▲
Rental Car	48.7	51.0	▲
Personal Car	50.4	47.1	▼
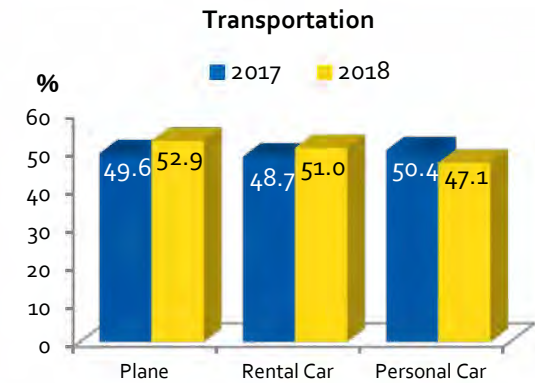
Airport Deplaned *(Base: Flew)*

	June 2017	June 2018	
Southwest Florida International	59.1%	60.4%	▲
Miami International	20.4	19.1	▼
Ft. Lauderdale International	9.6	10.6	▲
Tampa International	3.7	5.2	▲
Orlando International/Sanford	5.6	4.3	▼
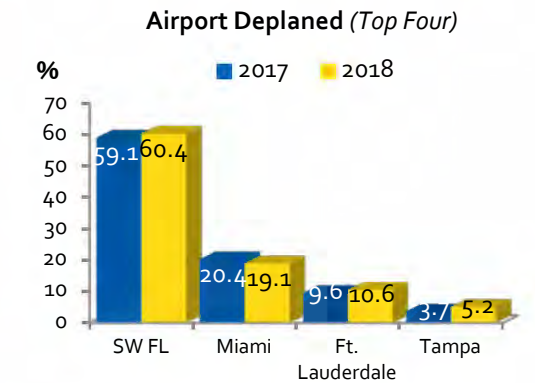
Purpose of Trip *(Multiple Response)*

	June 2017	June 2018	
Vacation/Weekend Getaway	84.7%	84.9%	▲
Group Travel	21.3	22.4	▲
Visit with Friends and Relatives	8.6	8.0	▼
Special Event	5.9	5.5	▼

First Visit to *(% yes)*

	June 2017	June 2018	
Collier County	36.8%	35.6%	▼
Florida	4.0	2.3	▼

Length of Stay *(Days)*

	June 2017	June 2018	
In Collier County	4.1	4.0	▼

Party Size

	June 2017	June 2018	
Number of People	2.9	2.8	▼

Transportation

Airport Deplaned *(Top Four)*

Length of Stay in Collier County *(Days)*

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Naples, Marco Island, Everglades Visitor Profile | June 2018

Party Composition *(Multiple Response)*	June 2017	June 2018	
Couple	47.2%	51.0%	↑
Family	44.9	40.9	↓
Single	8.2	9.4	↑
Group of Friends	4.5	3.3	↓

Party Composition *(Top Three)*

Did Party Have Lodging Reservations for Stay	June 2017	June 2018	
% Yes	95.2%	96.4%	↑

Expense Relative to Expectations	June 2017	June 2018	
More Expensive	19.3%	17.1%	↓
Less Expensive	2.3	5.3	↑
As Expected	70.5	72.5	↓

Satisfied/Recommend

Satisfaction with Collier County	June 2017	June 2018	
Very Satisfied	78.8%	82.4%	↑
Satisfied	17.3	12.1	↓
Satisfaction Level *(Combined)*	**96.1%**	**94.5%**	↓

Recommend Collier to Friends/Relatives	June 2017	June 2018	
% Yes	93.2%	92.2%	↓

Plan to Return

Plan to Return *(% Yes)*	June 2017	June 2018	
To Local Area	90.5%	90.0%	↓

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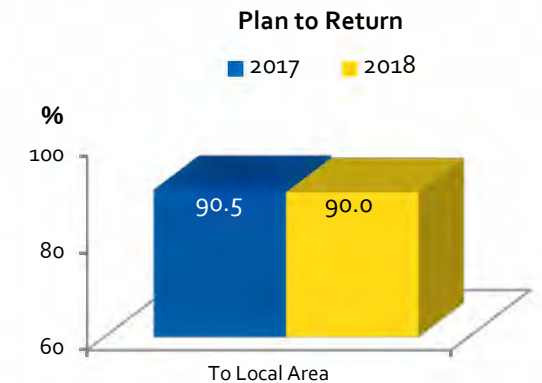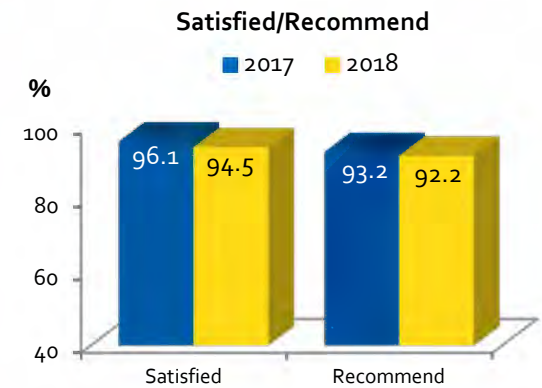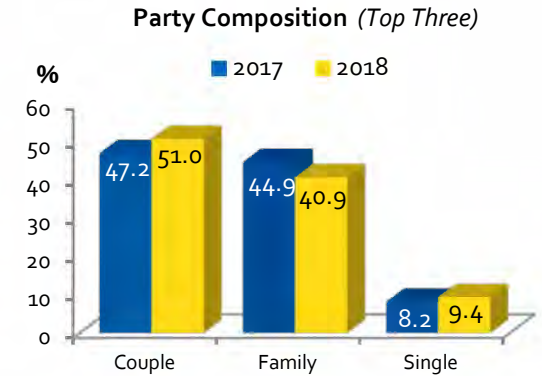
Naples, Marco Island, Everglades Visitor Profile | June 2018

Activities Enjoyed in Area *(Multiple Response)*

Activity	June 2017	June 2018	
Beach	84.1%	86.3%	↑
Dining Out	75.0	76.5	↑
Relaxing	67.0	65.8	↓
Shopping	56.4	55.6	↓
Pool	46.9	49.2	↑
Sunsets	41.7	42.1	↑
Sightseeing	32.5	35.2	↑
Sunning	29.7	30.8	↑
Enjoying Nature/Bird Watching/Everglades	31.5	28.1	↓
Swimming	27.8	26.3	↓
Reading	24.3	23.5	↓
Walking	25.5	20.9	↓
Bars/Nightlife	18.0	19.7	↑
Art Galleries/Shows/Fairs	13.5	15.7	↑
Boating	16.3	14.7	↓
Visiting with Friends/Relatives	10.2	8.1	↓
Golfing	7.3	6.7	↓

Demographics

	June 2017	June 2018	
Average Age Head of Household *(Years)*	46.2	47.5	↑
Median Annual Household Income	$142,754	$143,049	↑

Collier Base Budget

	June 2017	June 2018	
Total	$1,970.90	$1,942.65	↓
Per Person/Stay	679.62	693.80	↑
Per Person/Day	165.76	173.45	↑

Activities Enjoyed in Area *(Top Five)*

2018   2017

Activity	2018	2017
Beach	86.3	84.1
Dining Out	76.5	75.0
Relaxing	65.8	67.0
Shopping	55.6	56.4
Pool	49.2	46.9

Collier Base Budgets

2017   2018

	2017	2018
Total Party Budget	1,971	1,943
Per Person/Stay	680	694
Per Person/Day	166	173

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Naples, Marco Island, Everglades Visitor Profile | June 2018

Area Information Seen/Read/Heard	June 2017	June 2018	
% Yes	58.0%	60.6%	↑

Seen/Read/Heard

■ 2017 ■ 2018

Info. Influenced

■ 2017 ■ 2018

Directly Influenced by Information *(Base: Seen/Read/Heard Area Information)*	June 2017	June 2018	
% Yes	33.5%	33.3%	↓

Why Chose the Area *(Multiple Response)*	June 2017	June 2018	
Beach Area	58.0%	62.0%	↑
Previous Experience	40.9	42.5	↑
Relaxing	39.1	40.4	↑
Quiet/Peaceful/Laid Back	36.4	39.9	↑
Weather	36.2	38.2	↑
Quality of Accommodations	35.4	36.0	↑
Not Crowded	31.8	33.7	↑
Restaurants	29.3	31.6	↑
Appealing Brochures/Websites	28.2	29.0	↑
Outdoor Recreation/Nature	25.1	22.6	↓
Business/Meeting/Conference	19.0	20.7	↑
Recommendation	22.9	19.5	↓
Never Been	21.6	18.0	↓

Internet Use

■ 2017 ■ 2018

Internet Use	June 2017	June 2018	
Use Internet to Obtain Travel Info for This Trip *(% Yes)*	96.5%	96.9%	↑
Book Reservations for Trip Online *(%Yes)*	82.4	83.7	↑

Industry Data:
2014-2018

NAPLES
MARCO ISLAND
EVERGLADES
FLORIDA'S PARADISE COAST

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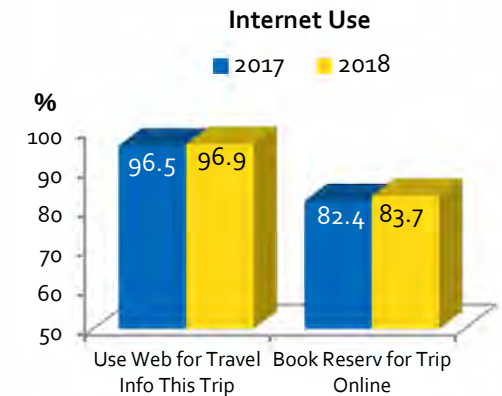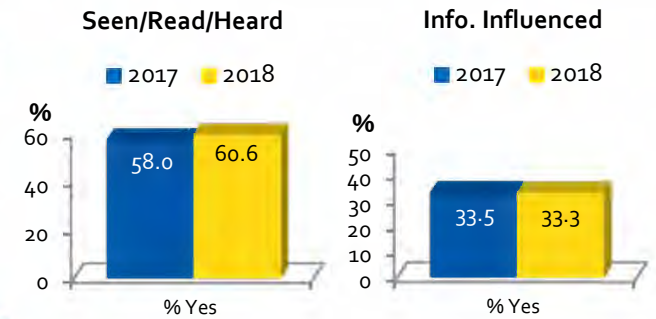
Collier Direct Leisure and Hospitality Employment *(Calendar Year)* *

	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
2018	28,900	29,400	29,800	29,300	28,200							
2017	30,300	30,700	31,100	30,400	28,800	27,000	25,800	25,700	23,300	25,200	27,400	28,200
2016	29,000	29,700	29,700	29,000	27,500	25,900	25,000	24,800	24,800	26,300	28,500	29,300
2015	27,700	28,400	28,600	27,900	26,300	24,800	23,800	23,800	24,000	25,600	27,900	28,700
2014	26,900	27,600	27,900	27,100	25,700	24,100	23,200	23,100	22,700	24,400	26,500	26,900

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

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Southwest Florida International Airport (RSW) Passenger Traffic

CY 2014: 7.97 million (+4.4%)

CY 2015: 8.37 million (+5.0%)

CY 2016: 8.60 million (+2.8%)

CY 2017: 8.84 million (+2.8%)

CY 2018 to Date: 5.01 million (+21.4%)
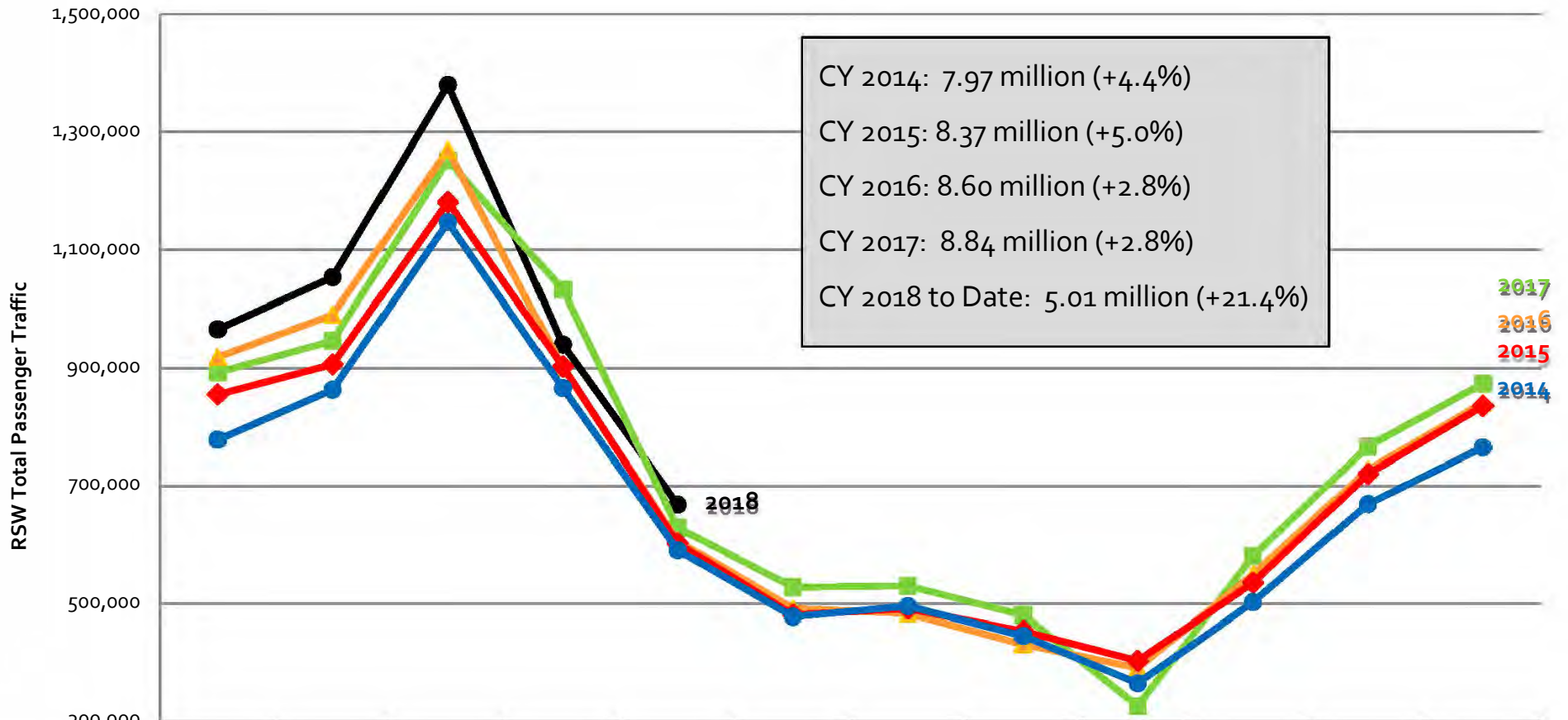
	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
2018	965,981	1,053,817	1,379,728	939,957	668,665							
2017	892,905	946,079	1,252,124	1,032,783	629,321	528,383	530,428	481,185	327,466	581,317	767,064	873,494
2016	918,929	989,845	1,269,961	900,594	606,833	492,413	484,074	431,729	391,844	550,316	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

RSW Total Passenger Traffic

2017
2016
2015
2014

2018

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