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Naples, Marco Island, Everglades Convention and Visitors Bureau March 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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April 2018

Naples, Marco Island, Everglades: March 2018 Summary

Executive Summary: March 2018

- This March, some **233,300** visitors stayed in Collier's commercial lodgings (**+1.1%**)*. Their visits contributed an estimated **\$348,873,000** of economic impact to the County (**+4.6%**). Key performance metrics are as follows:

<u>March</u>	<u>2017</u>	<u>2018**</u>	<u>% Δ</u>
Occupancy	90.3%	91.1%	+0.9%
ADR	\$336.4	\$372.0	+10.6%
RevPAR	\$303.8	\$338.9	+11.6%

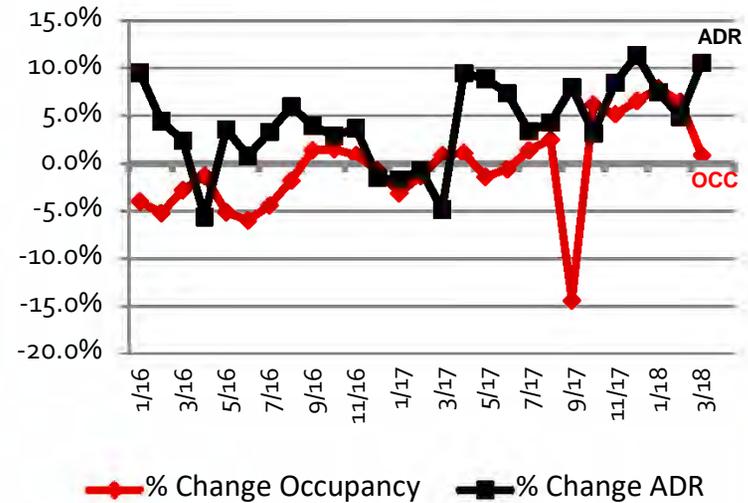
* As of March 2018, approximately 660 lodging units remain closed due to the impact of Hurricane Irma and restorations.

** Based on units available to be rented.

Key Collier Visitation Metrics (%Δ)



Key Collier Visitation Metrics (%Δ)



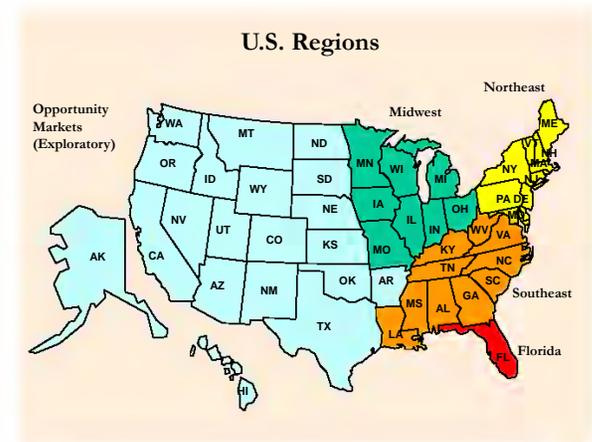
Naples, Marco Island, Everglades: March 2018 Summary

2. Compared to last March, over half (**51.7%**) of Collier lodging managers report their three month forward reservations levels as “up.”

% of Properties (March)			
<u>Reporting Reservations:</u>			
	<u>2017</u>	<u>2018</u>	
Up	50.0%	51.7%	
Same	31.3	37.9	
Down	18.8	10.3	

3. Collier’s March visitation originates from the following primary market segments:

<u>March Visitation</u>	<u>2018</u> <u>Visitor #</u>	<u>Δ</u>
Florida	50,159	-9.0%
Southeast	14,464	+6.3
Northeast	68,124	+2.5
Midwest	49,460	+4.6
Canada	4,666	-19.1
Europe	37,328	+15.6
Other	9,099	-10.4
Total	233,300	+1.1%



4. This March, seven out of every ten of the destination’s visitor parties flew (**2017: 72.9%; 2018: 76.8%**). A majority of these (**60.5%**) deplaned at RSW, with Miami capturing some **14.3%** of deplanements.
5. This March, visitor party size averaged **2.9** travelers who stayed for **3.4** nights in the Naples, Marco Island, Everglades area (**2017: 2.8 people; 3.5 nights**).

Naples, Marco Island, Everglades: March 2018 Summary

- 6.** Some **42.6%** of Collier's March visitors are in the destination for the first time.
- 7.** Fully **95.4%** consult the web for trip information, with some **79.4%** making bookings for their trip online.
- 8.** The vast majority (**95.3%**) are satisfied with their Collier stay, with **91.5%** planning a future trip to the area.
- 9.** The typical March visitor is **52.6 years of age (2017: 51.9 years)**.

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

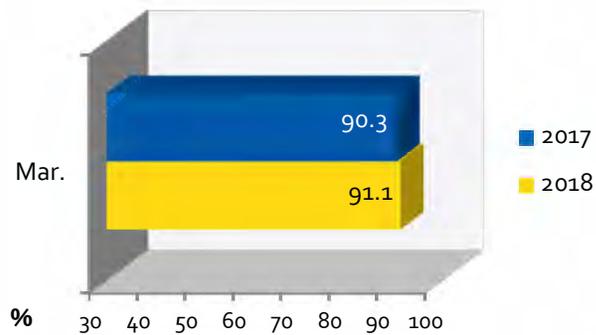


Naples, Marco Island, Everglades Visitor Profile March 2018

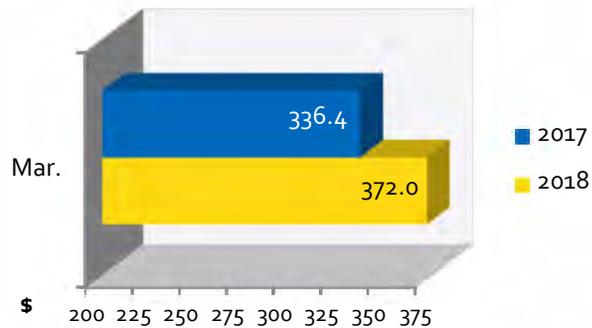
H/M/C+ Visitor Statistics	Year to Date (January – March)			March		
	2017	2018	% Δ '17/'18	2017	2018*	% Δ '17/'18
Visitors (#)	608,000	621,000	+2.1	230,700	233,300	+1.1
Room Nights	751,400	744,600	-0.9	273,300	265,500	-2.9
Direct Exp. (\$)	\$510,517,400	\$540,565,200	+5.9	\$223,594,400	\$233,985,900	+4.6
Total Eco. Impact (\$)	\$761,181,500	\$805,982,800	+5.9	\$333,379,300	\$348,873,000	+4.6

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

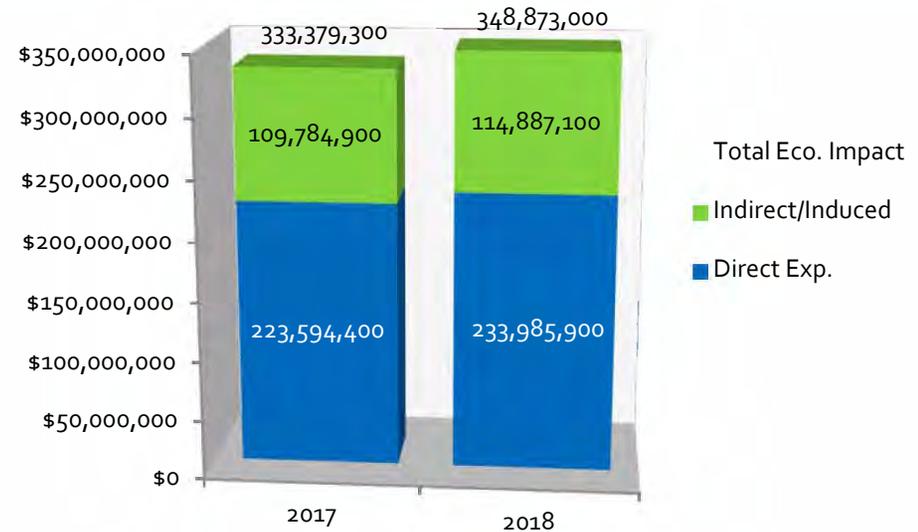
March Occupancy



March Room Rates



March Economic Impact



March

Lodging Statistics

	2017	2018**	% Δ '17/'18
Occupancy	90.3%	91.1%	+0.9
Room Rates	\$336.4	\$372.0	+10.6
RevPAR	\$303.8	\$338.9	+11.6

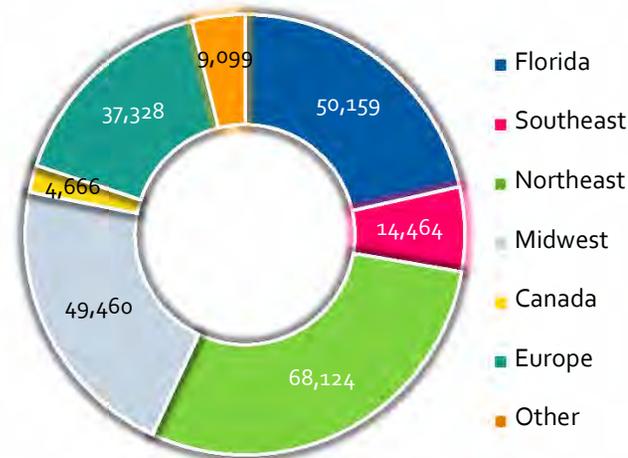
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March 2018 Visitor Origin Markets

Visitor Origins	2017		2018		% Δ '17/'18
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	23.9%	55,137	21.5%	50,159	-9.0
Southeast	5.9	13,611	6.2	14,464	+6.3
Northeast	28.8	66,442	29.2	68,124	+2.5
Midwest	20.5	47,294	21.2	49,460	+4.6
Canada	2.5	5,767	2.0	4,666	-19.1
Europe	14.0	32,298	16.0	37,328	+15.6
Other	4.4	10,151	3.9	9,099	-10.4
Total	100.0	230,700	100.0	233,300	+1.1

March 2018 Visitor Origins



Naples, Marco Island, Everglades Visitor Profile | March 2018

Transportation Mode (Multiple Response)	March 2017	March 2018	
Plane	72.9%	76.8%	↑
Rental Car	68.7	67.3	
Personal Car	27.1	23.2	↓

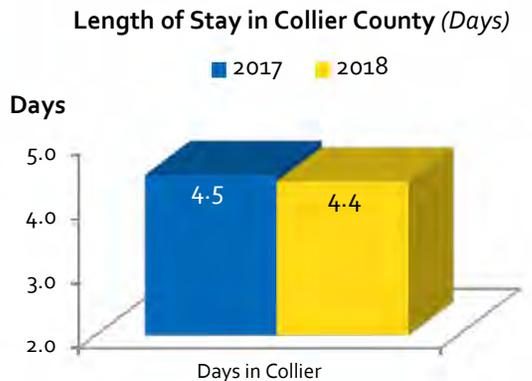
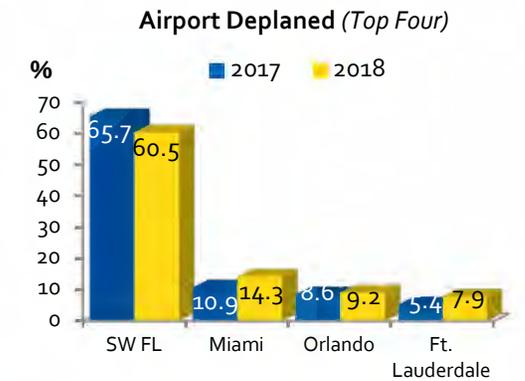
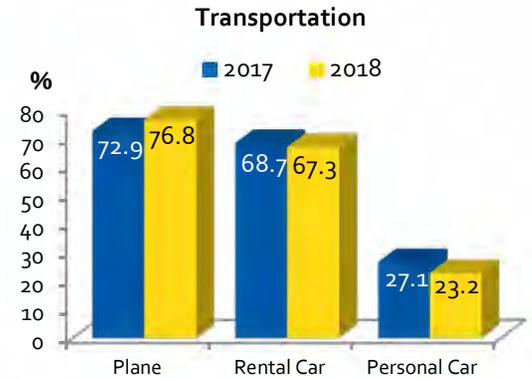
Airport Deplaned (Base: Flew)	March 2017	March 2018	
Southwest Florida International	65.7%	60.5%	↓
Miami International	10.9	14.3	
Orlando International/Sanford	8.6	9.2	↑
Ft. Lauderdale International	5.4	7.9	
Tampa International	4.3	5.3	↑

Purpose of Trip (Multiple Response)	March 2017	March 2018	
Vacation/Weekend Getaway	81.3%	84.2%	↑
Group Travel	23.4	21.9	↓
Visit with Friends and Relatives	13.9	12.8	↓

First Visit to (% yes)	March 2017	March 2018	
Collier County	41.3%	42.6%	↑
Florida	3.7	4.3	

Length of Stay (Days)	March 2017	March 2018	
In Collier County	4.5	4.4	↓

Party Size	March 2017	March 2018	
Number of People	2.8	2.9	↑



Naples, Marco Island, Everglades Visitor Profile | March 2018

Party Composition (Multiple Response)	March 2017	March 2018	
Couple	62.4%	60.7%	↓
Family	33.9	34.8	↑
Group of Friends	7.0	5.5	↓
Single	5.2	4.6	

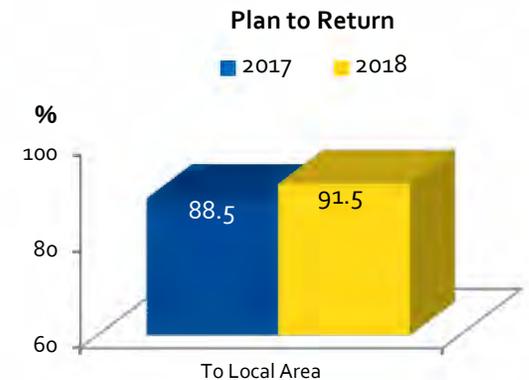
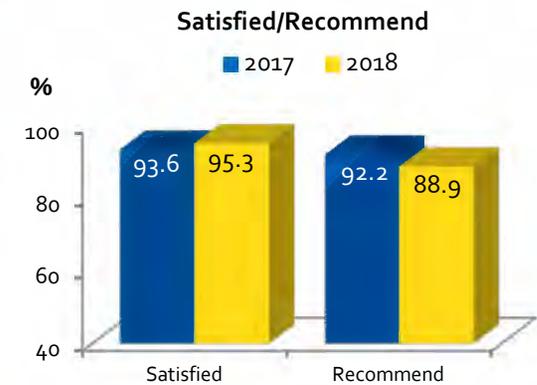
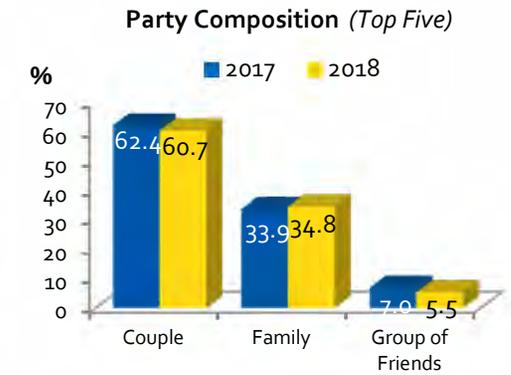
Did Party Have Lodging Reservations for Stay	March 2017	March 2018	
% Yes	95.7%	97.9%	↑

Expense Relative to Expectations	March 2017	March 2018	
More Expensive	23.0%	27.2%	↑
Less Expensive	3.0	1.4	
As Expected	67.6	68.8	↑

Satisfaction with Collier County	March 2017	March 2018	
Very Satisfied	87.3%	83.0%	↓
Satisfied	6.3	12.3	↓
Satisfaction Level (Combined)	93.6%	95.3%	↑

Recommend Collier to Friends/Relatives	March 2017	March 2018	
% Yes	92.2%	88.9%	↓

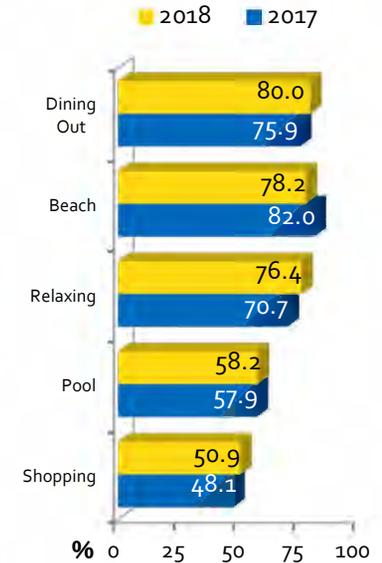
Plan to Return (% Yes)	March 2017	March 2018	
To Local Area	88.5%	91.5%	↑



Naples, Marco Island, Everglades Visitor Profile | March 2018

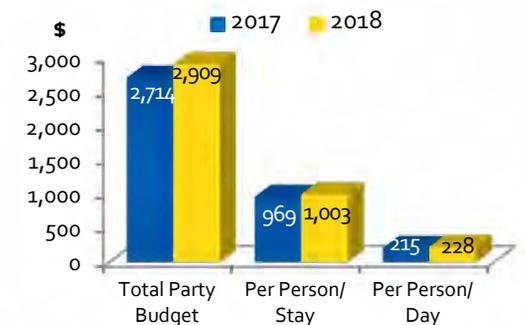
Activities Enjoyed in Area (Multiple Response)	March 2017	March 2018	
Dining Out	75.9%	80.0%	↑
Beach	82.0	78.2	
Relaxing	70.7	76.4	↑
Pool	57.9	58.2	
Shopping	48.1	50.9	↑
Swimming	35.2	33.1	
Sightseeing	31.2	30.1	↓
Reading	28.2	29.3	
Walking	22.8	26.4	↑
Sunsets	26.8	25.0	
Bars/Nightlife	17.3	23.6	↑
Sunning	26.3	23.6	
Enjoying Nature/Bird Watching/Everglades	16.3	22.4	↑
Visiting with Friends/Relatives	22.6	20.0	↓
Art Galleries/Shows/Fairs	17.1	18.2	↑
Shelling	16.0	14.8	↓
Golfing	12.0	8.5	↓

Activities Enjoyed in Area (Top Five)



Demographics	March 2017	March 2018	
Average Age Head of Household (Years)	51.9	52.6	↑
Median Annual Household Income	\$176,217	\$177,932	↑

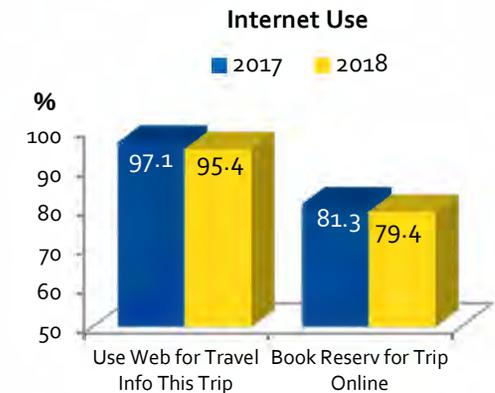
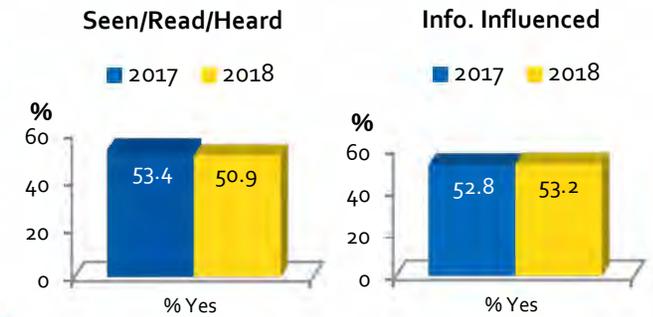
Collier Base Budgets



Collier Base Budget	March 2017	March 2018	
Total	\$2,713.75	\$2,908.54	↑
Per Person/Stay	969.20	1,002.94	↑
Per Person/Day	215.38	227.94	↑

Naples, Marco Island, Everglades Visitor Profile | March 2018

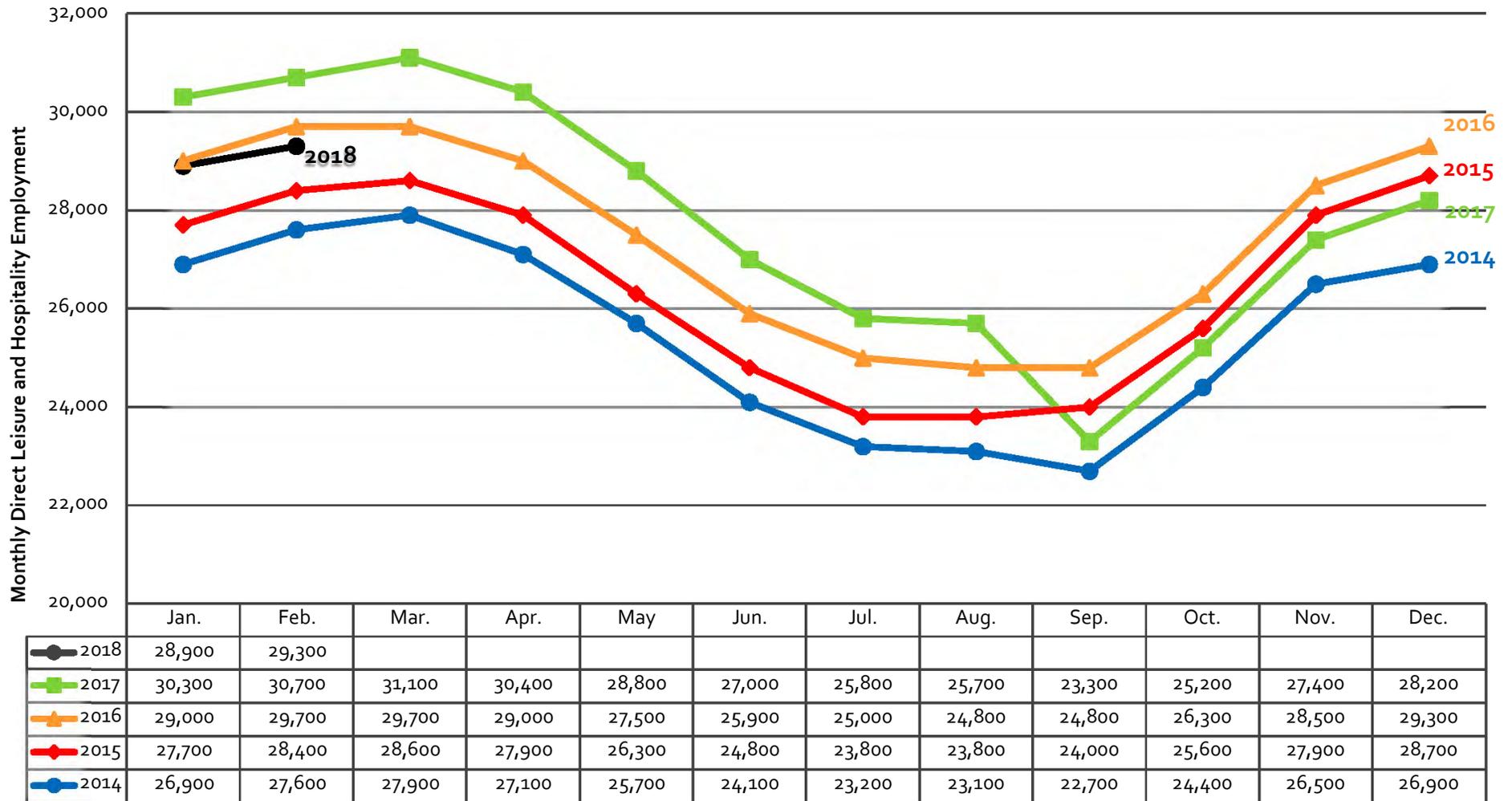
Area Information Seen/Read/Heard	March 2017	March 2018	
% Yes	53.4%	50.9%	↓
Directly Influenced by Information (Base: Seen/Read/Heard Area Information)			
	March 2017	March 2018	
% Yes	52.8%	53.2%	↑
Why Chose the Area (Multiple Response)			
	March 2017	March 2018	
Beach Area	56.0%	54.5%	↓
Weather	53.7	49.1	
Previous Experience	35.7	34.3	↓
Relaxing	34.9	32.7	
Quiet/Peaceful/Laid Back	34.3	29.1	↓
Restaurants	30.3	29.0	
Recommendation	31.5	28.8	↓
Quality of Accommodations	26.9	27.3	
Appealing Brochures/Websites	29.6	26.8	↓
Outdoor Recreation/Nature	22.1	25.4	
Business/Meeting/Conference	25.0	22.6	↓
Never Been	21.4	21.8	
Not Crowded	17.2	15.8	↓
Internet Use			
	March 2017	March 2018	
Use Internet to Obtain Travel Info for This Trip (% Yes)	97.1%	95.4%	↓
Book Reservations for Trip Online (%Yes)	81.3	79.4	



Industry Data: *2014-2018*

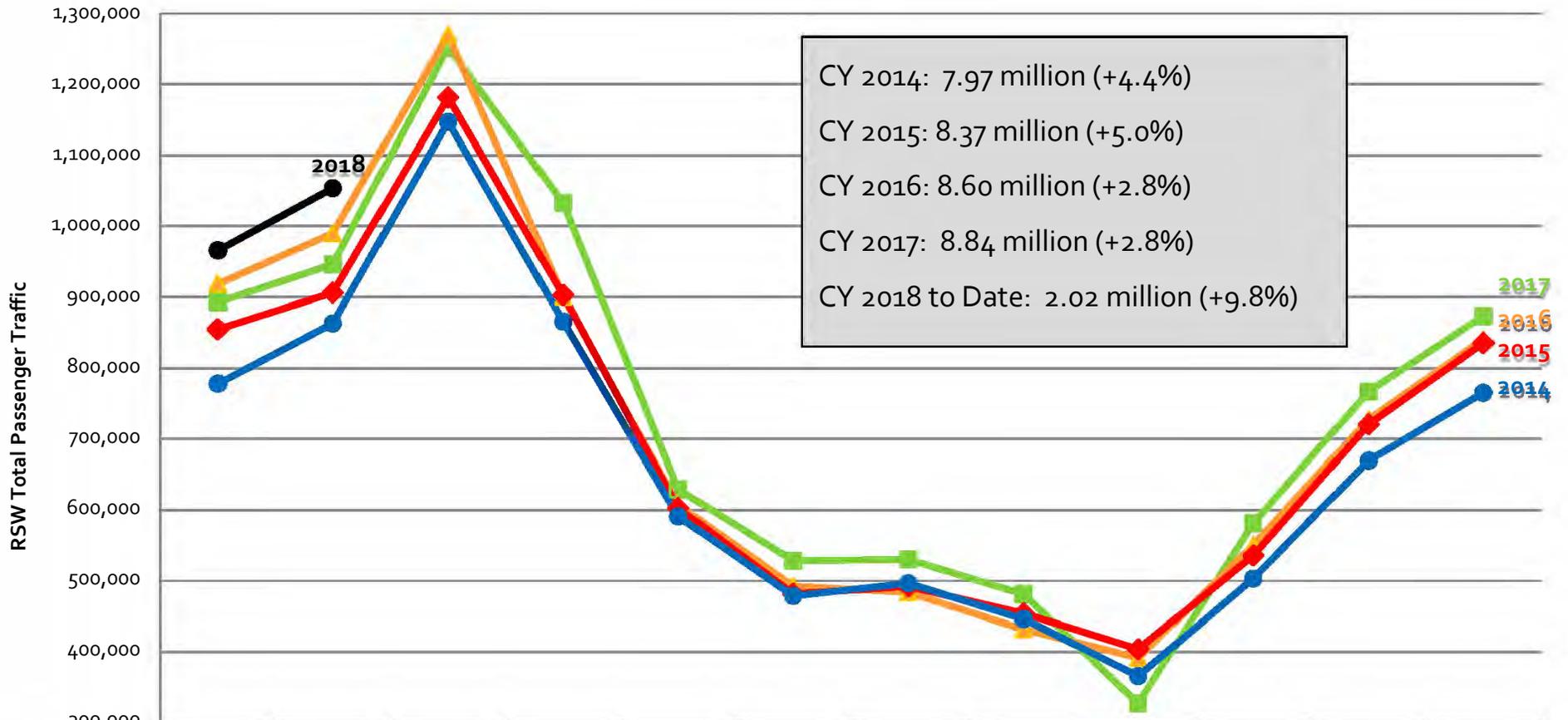


Collier Direct Leisure and Hospitality Employment (Calendar Year) *



* Source: Florida Department of Economic Opportunity/U.S. Department of Labor. June 2016 through December 2017 data updated with January 2018 reporting.

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										
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