

RESEARCH DATA SERVICES, INC.

777 SOUTH HARBOUR ISLAND BOULEVARD • SUITE 260
TAMPA, FLORIDA 33602
TEL (813) 254-2975 • FAX (813) 223-2986



Naples, Marco Island, Everglades Convention and Visitors Bureau April 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

May 2017

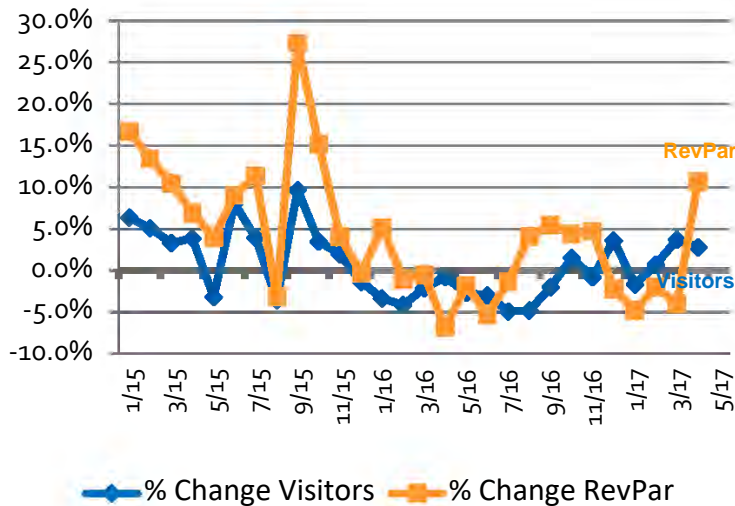
Naples, Marco Island, Everglades: April 2017 Summary

Executive Summary: April 2017

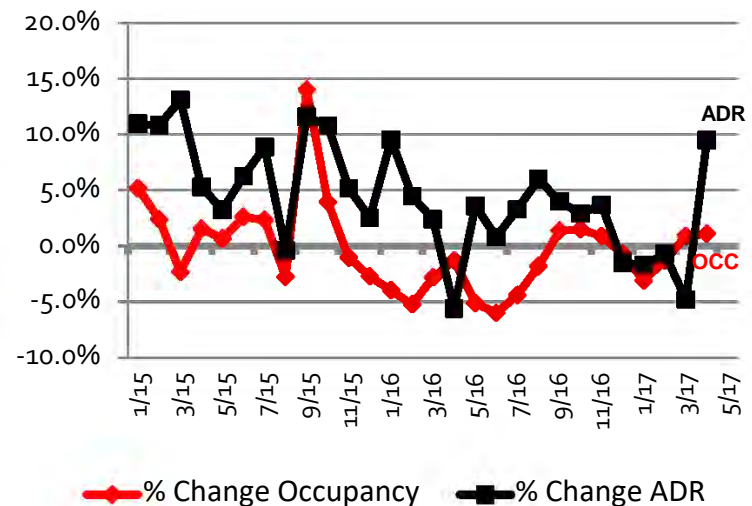
- This April, some **142,500** visitors stayed in Collier's commercial lodgings (+2.8%). Their visits contributed an estimated **\$219,045,500** of economic impact to the County (+5.7%). Key performance metrics are as follows:

	<u>April</u>	<u>2016</u>	<u>2017</u>	<u>% Δ</u>
Occupancy		83.4%	84.3%	+1.1%
ADR		\$259.1	\$283.8	+9.5%
RevPAR		\$216.1	\$239.2	+10.7%

Key Collier Visitation Metrics (%Δ)



Key Collier Visitation Metrics (%Δ)



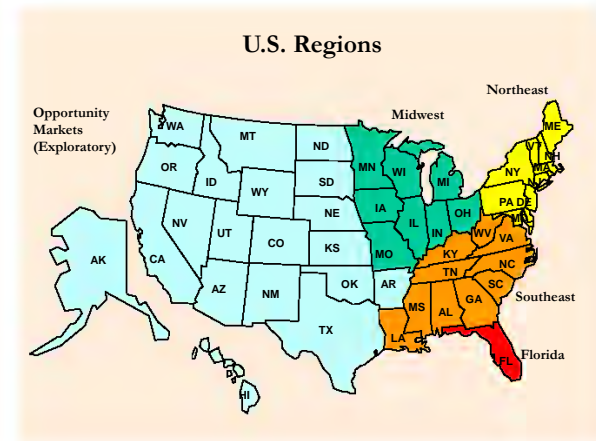
- Compared to last April, nine out of ten (**90.6%**) lodging managers report their three month forward reservations levels as "up" or the "same":

<u>% of Properties (April)</u>		<u>2016</u>	<u>2017</u>
<u>Reporting Reservations:</u>			
Up		27.7%	41.7%
Same		53.8	48.9
Down		16.4	9.4

Naples, Marco Island, Everglades: April 2017 Summary

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

<u>April Visitation</u>	<u>2017 Visitor #</u>	<u>Δ</u>
Florida	41,183	+6.1%
Southeast	7,980	-4.0
Northeast	32,918	-1.5
Midwest	27,930	+6.1
Canada	4,702	+9.5
Europe	22,515	+4.1
West	5,272	-9.4
Total	142,500	+2.8%



- This April, seven out of every ten of the destination's patrons flew (**2016: 72.7%; 2017: 73.6%**). A majority of these (**66.3%**) deplaned at RSW, with Miami capturing some **15.8%** of deplanements.
- The typical April visitor party includes an average of **2.8** travelers who stay for **3.7** nights in the Naples, Marco Island, Everglades area.
- Some **46.2%** of Collier's April visitors are in the destination for the first time (**2016: 44.5%**).
- Fully **94.3%** consulted the web for trip information, with some **80.8%** making bookings for their trip online.
- The vast majority (**96.7%**) are satisfied with their Collier stay, with **89.3%** planning a future trip to the area (**2016: 90.2%**).
- This year, April visitors average **48.3** years of age (**2016: 48.9 years of age**).

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

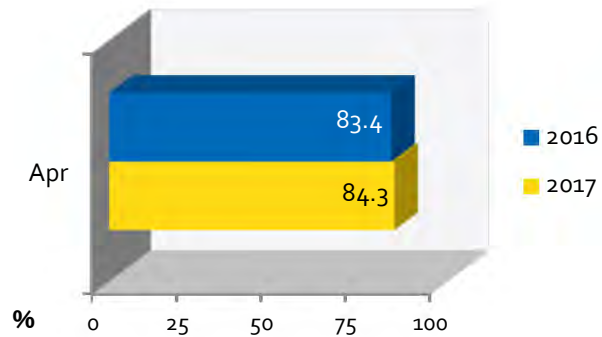


Naples, Marco Island, Everglades Visitor Profile April 2017

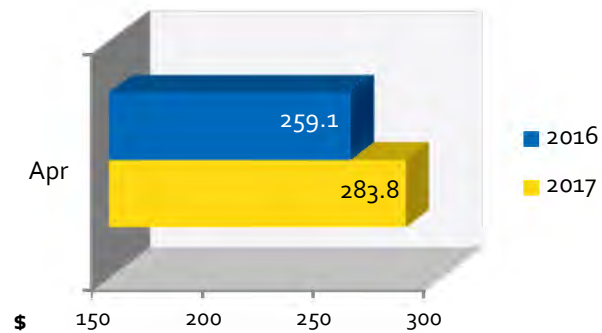
H/M/C* Visitor Statistics	Year to Date (Jan. – Apr.)			April		
	2016	2017	% Δ '16/'17	2016	2017	% Δ '16/'17
Visitors (#)	740,100	750,500	+1.4	138,600	142,500	+2.8
Room Nights	992,900	974,200	-1.9	217,700	222,800	+2.3
Direct Exp. (\$)	\$634,641,000	\$657,429,200	+3.6	\$139,024,100	\$146,911,800	+5.7
Total Eco. Impact (\$)	\$946,249,700	\$980,227,000	+3.6	\$207,284,900	\$219,045,500	+5.7

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

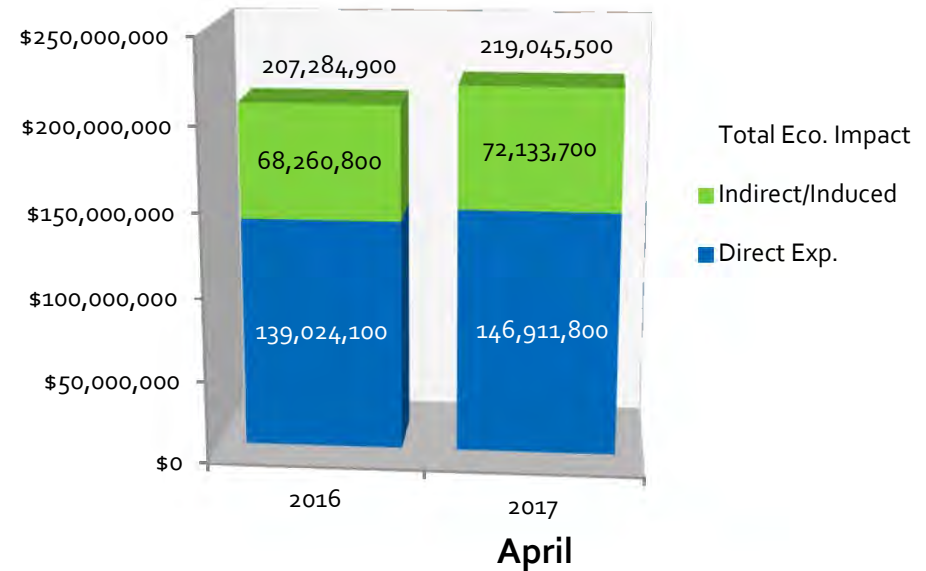
April Occupancy



April Room Rates



April Economic Impact



Lodging Statistics

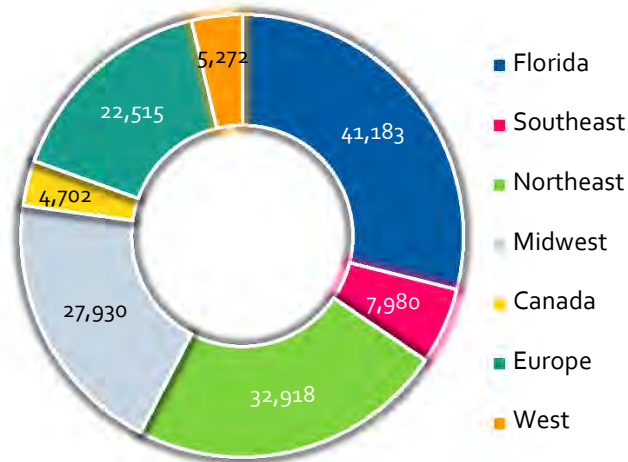
	2016	2017**	% Δ '16/'17
Occupancy	83.4%	84.3%	+1.1
Room Rates	\$259.1	\$283.8	+9.5
RevPAR	\$216.1	\$239.2	+10.7

** Note: 40 prime lodging units were closed for renovations

April 2017 Visitor Origin Markets

Visitor Origins	2016		2017		% Δ '16/'17
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	28.0%	38,808	28.9%	41,183	+6.1
Southeast	6.0	8,316	5.6	7,980	-4.0
Northeast	24.1	33,403	23.1	32,918	-1.5
Midwest	19.0	26,334	19.6	27,930	+6.1
Canada	3.1	4,296	3.3	4,702	+9.5
Europe	15.6	21,622	15.8	22,515	+4.1
West	4.2	5,821	3.7	5,272	-9.4
Total	100.0	138,600	100.0	142,500	+2.8

April 2017 Visitor Origins



Naples, Marco Island, Everglades Visitor Profile | April 2017

Transportation Mode (Multiple Response)	April 2016	April 2017
Plane	72.7%	73.6%
Rental Car	68.0	65.2
Personal Car	27.0	25.8

Airport Deplaned (Base: Flew)	April 2016	April 2017
Southwest Florida International	68.3%	66.3%
Miami International	16.6	15.8
Orlando International/Sanford	4.0	6.1
Ft. Lauderdale International	6.3	4.4
Tampa International	3.3	2.7

Purpose of Trip (Multiple Response)	April 2016	April 2017
Vacation/Weekend Getaway	86.6%	88.3%
Group Travel	21.8	21.6
Visit with Friends and Relatives	18.3	16.4

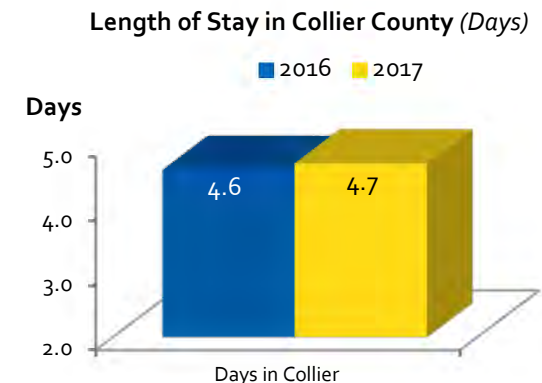
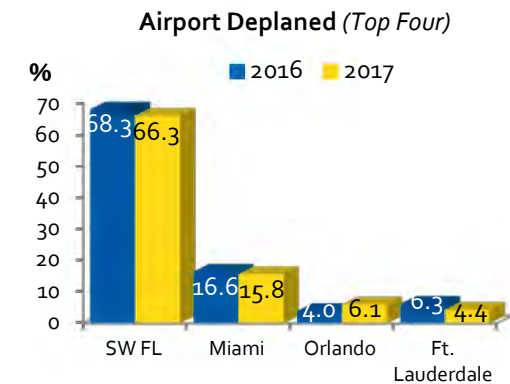
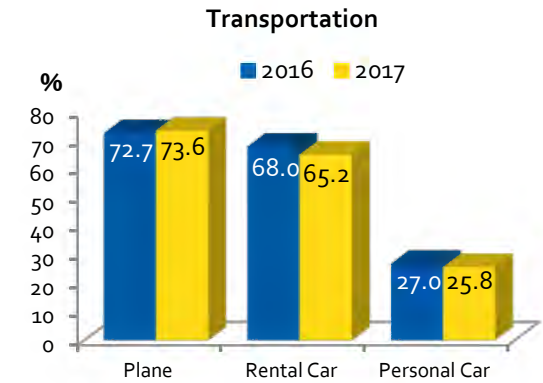
First Visit to (% yes)	April 2016	April 2017
Collier County	44.5%	46.2%
Florida	4.0	5.1

Length of Stay (Days)	April 2016	April 2017
In Collier County	4.6	4.7

Party Size	April 2016	April 2017
Number of People	2.7	2.8

Party Composition (Multiple Response)	April 2016	April 2017
Couple	56.2%	59.2%
Family	27.4	30.8
Single	12.9	11.2
Group of Friends	7.3	5.1

Did Party Have Lodging Reservations for Stay	April 2016	April 2017
% Yes	97.6%	95.7%



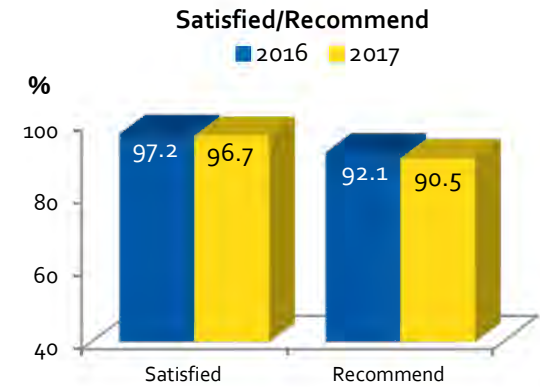
Naples, Marco Island, Everglades Visitor Profile | April 2017

Satisfaction with Collier County	April 2016	April 2017
Very Satisfied	86.9%	87.4%
Satisfied	10.3	9.3
Satisfaction Level (Combined)	97.2%	96.7%

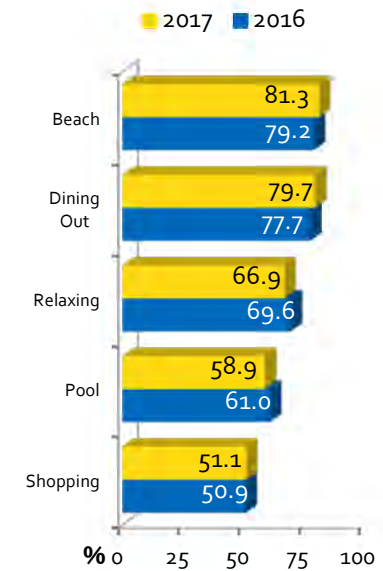
Activities Enjoyed in Area (Multiple Response)	April 2016	April 2017
Beach	79.2%	81.3%
Dining Out	77.7	79.7
Relaxing	69.6	66.9
Pool	61.0	58.9
Shopping	50.9	51.1
Swimming	40.3	41.6
Sunsets	28.7	31.6
Enjoying Nature/Bird Watching/Everglades	24.7	27.8
Visiting with Friends/Relatives	26.8	24.5
Sunning	20.5	23.0
Sightseeing	23.5	20.1
Bars/Nightlife	22.1	19.7
Reading	18.0	19.5
Walking	17.5	18.2
Art Galleries/Shows/Fairs	18.1	16.5
Golfing	11.2	9.5

Expense Relative to Expectations	April 2016	April 2017
More Expensive	21.7%	21.2%
Less Expensive	1.2	2.9
As Expected	76.0	75.1

Demographics	April 2016	April 2017
Average Age Head of Household (Years)	48.9	48.3
Median Annual Household Income	\$152,863	\$159,275

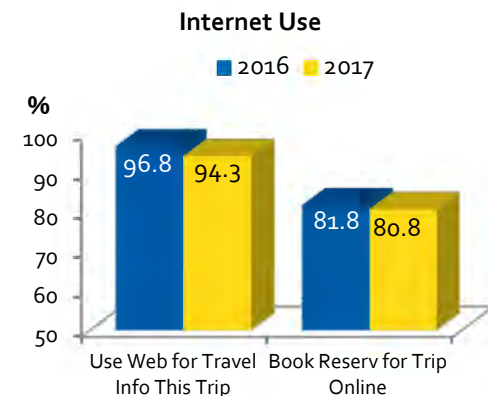
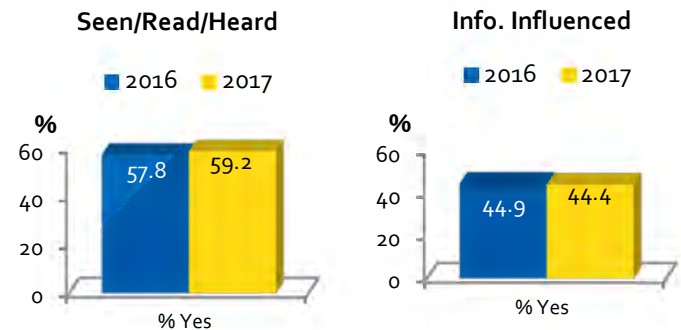
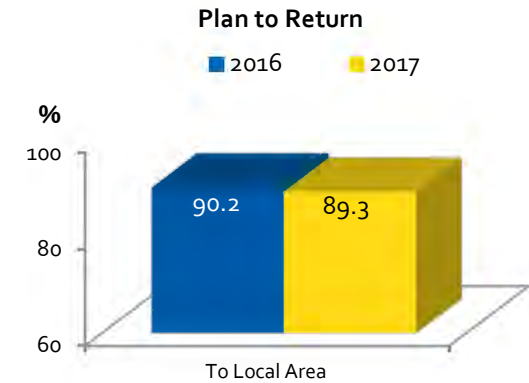


Activities Enjoyed in Area (Top Five)



Naples, Marco Island, Everglades Visitor Profile | April 2017

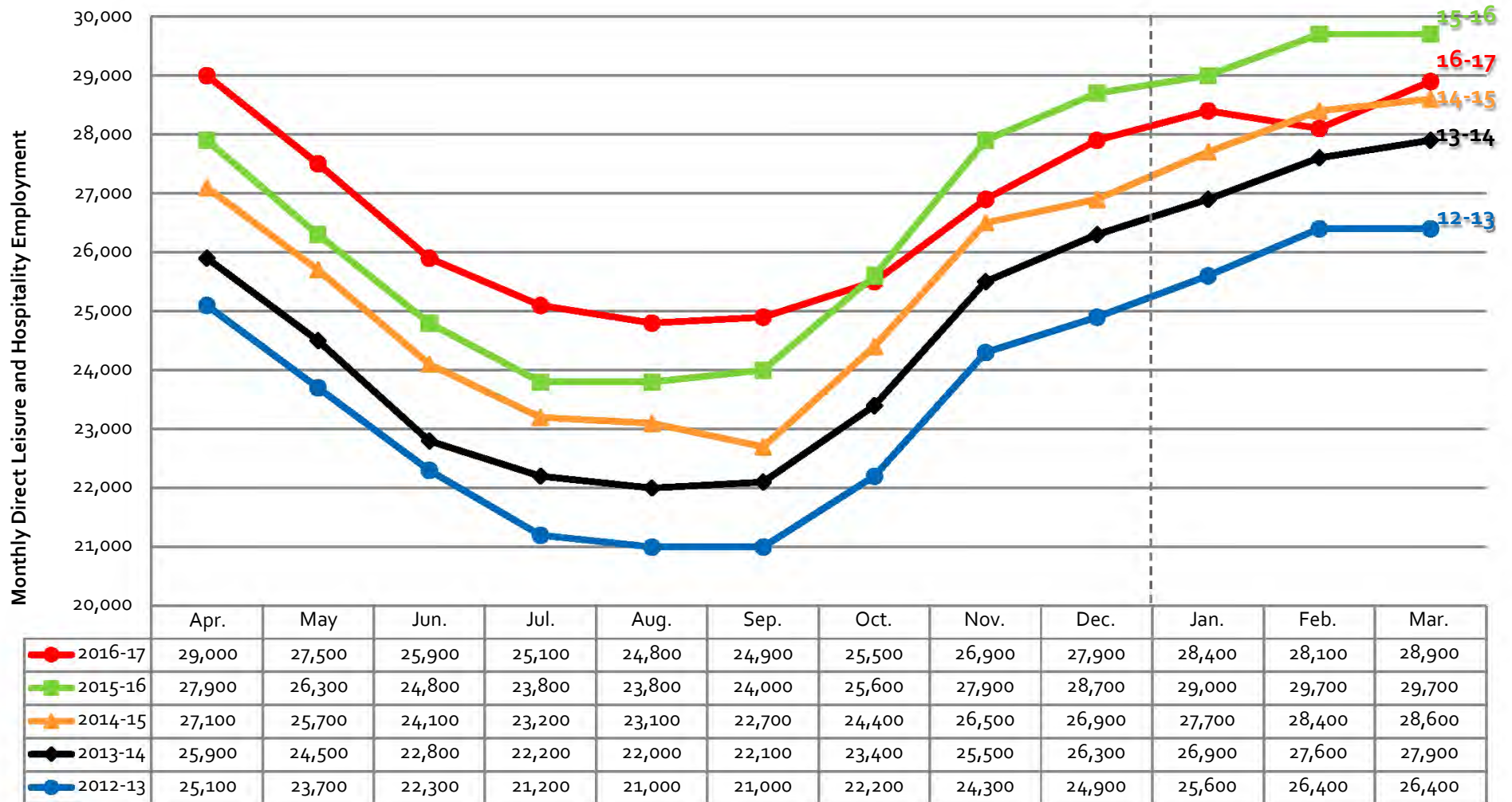
Recommend Collier to Friends/Relatives	April 2016	April 2017
% Yes	92.1%	90.5%
Plan to Return (% Yes)	April 2016	April 2017
To Local Area	90.2%	89.3%
Collier Base Budget	April 2016	April 2017
Total	\$2,708.27	\$2,886.70
Per Person/Stay	1,003.06	1,030.96
Per Person/Day	218.06	219.35
Area Information Seen/Read/Heard	April 2016	April 2017
% Yes	57.8%	59.2%
Directly Influenced by Information (Base: Seen/Read/Heard Area Information)	April 2016	April 2017
% Yes	44.9%	44.4%
Why Chose the Area (Multiple Response)	April 2016	April 2017
Beach Area	59.8%	56.0%
Weather	47.6	50.4
Restaurants	37.2	41.2
Relaxing	43.0	41.1
Previous Experience	38.4	35.7
Quiet/Peaceful/Laid Back	38.2	35.1
Quality of Accommodations	30.4	31.2
Outdoor Recreation/Nature	28.0	27.7
Appealing Brochures/Websites	27.4	26.9
Recommendation	29.3	26.5
Never Been	24.4	26.3
Business/Meeting/Conference	21.9	20.8
Not Crowded	23.2	20.6
Internet Use	April 2016	April 2017
Use Internet to Obtain Travel Info for This Trip (% Yes)	96.8%	94.3%
Book Reservations for Trip Online (%Yes)	81.8	80.8



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

