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Naples, Marco Island, Everglades Convention and Visitors Bureau August 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

September 2018

Naples, Marco Island, Everglades: August 2018 Summary

Executive Summary: August 2018

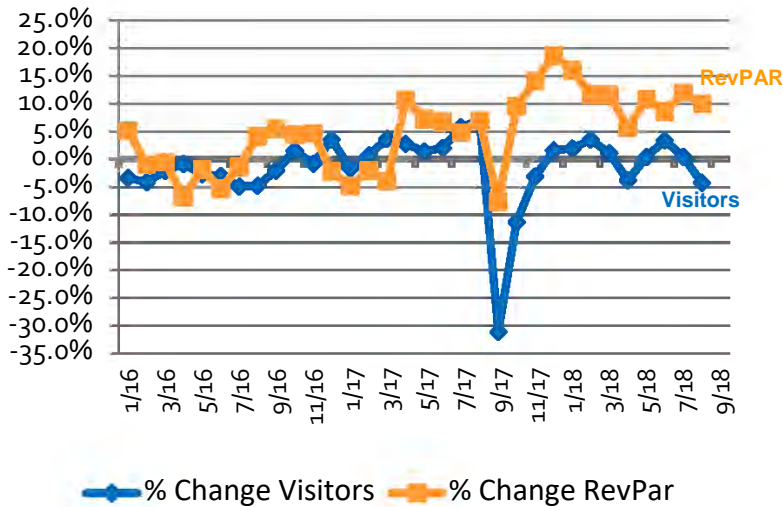
- This August, some **102,800** visitors stayed in Collier's commercial lodgings (-4.2%)*. Their visits contributed an estimated **\$89,000,500** of economic impact to the County (-1.5%). Key performance metrics are as follows:

<u>August</u>	<u>2017</u>	<u>2018**</u>	<u>% Δ</u>
Occupancy	60.7%	61.8%	+1.8%
ADR	\$143.6	\$155.2	+8.1%
RevPAR	\$87.2	\$95.9	+10.0%

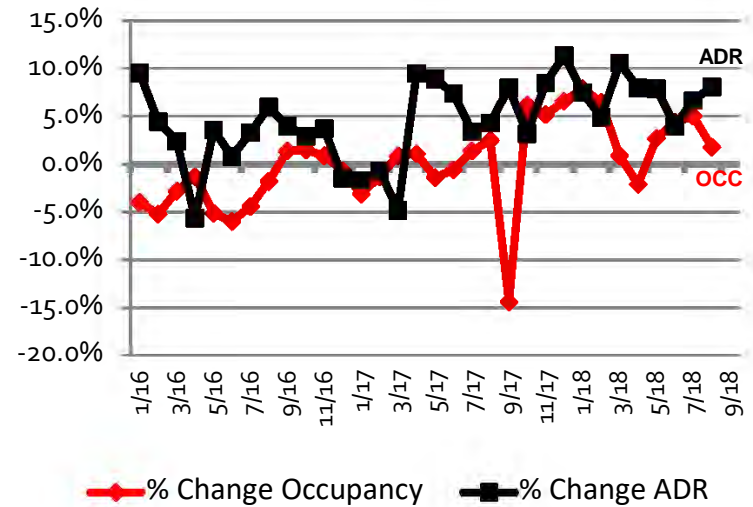
* As of August 2018, approximately 969 lodging units remain closed due to the impact of Hurricane Irma and restorations.

** Based on units available to be rented.

Key Collier Visitation Metrics (%Δ)



Key Collier Visitation Metrics (%Δ)



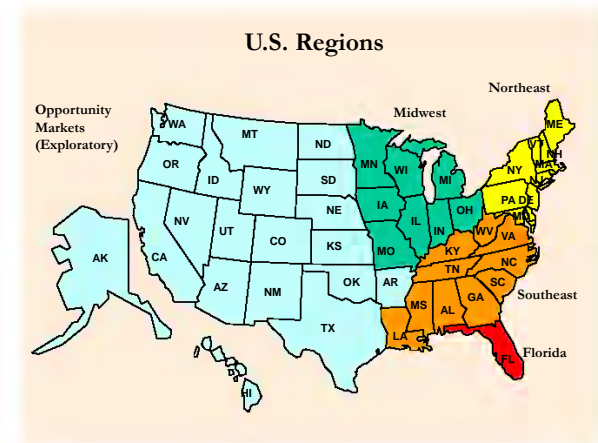
Naples, Marco Island, Everglades: August 2018 Summary

2. Despite the impact of red tide, compared to last August, nearly half (**40.7%**) of Collier lodging managers report their three month forward reservations levels as “up” (**2017: 23.5%**).

% of Properties (August)		
<u>Reporting Reservations:</u>	<u>2017</u>	<u>2018</u>
Up	23.5%	40.7%
Same	58.8	20.1
Down	17.6	39.3

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

<u>August Visitation</u>	<u>2018</u>	<u>Δ</u>
Florida	52,839	-0.3%
Southeast	4,729	+4.9
Northeast	8,532	+1.9
Midwest	8,018	+1.0
Canada	1,131	+5.4
Europe	22,822	-15.9
Other	4,729	-10.1
Total	102,800	-4.2%



4. This August, over half of the destination’s visitor parties flew (**2017: 57.3%; 2018: 54.4%**). A majority of these (**53.5%**) deplaned at RSW, with Miami capturing some **17.6%** of deplanements.
5. This August, visitor party size averaged **2.6** travelers who stayed for **3.5 nights** in the Naples, Marco Island, Everglades area (**2017: 2.8 people; 3.7 nights**).

Naples, Marco Island, Everglades: August 2018 Summary

- 6.** Some **45.2%** of Collier's August visitors are in the destination for the first time.
- 7.** Fully **96.5%** consult the web for trip information, with some **84.5%** making bookings for their trip online.
- 8.** The vast majority (**91.5%**) are satisfied with their Collier stay, with **93.2%** planning a future trip to the area.
- 9.** The typical August visitor is **46.1 years of age (2017: 45.7 years)**.

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

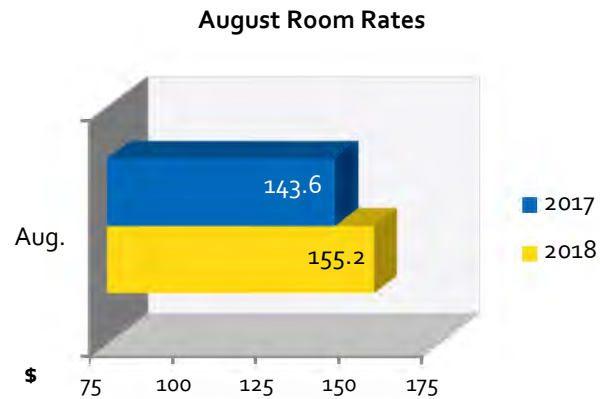
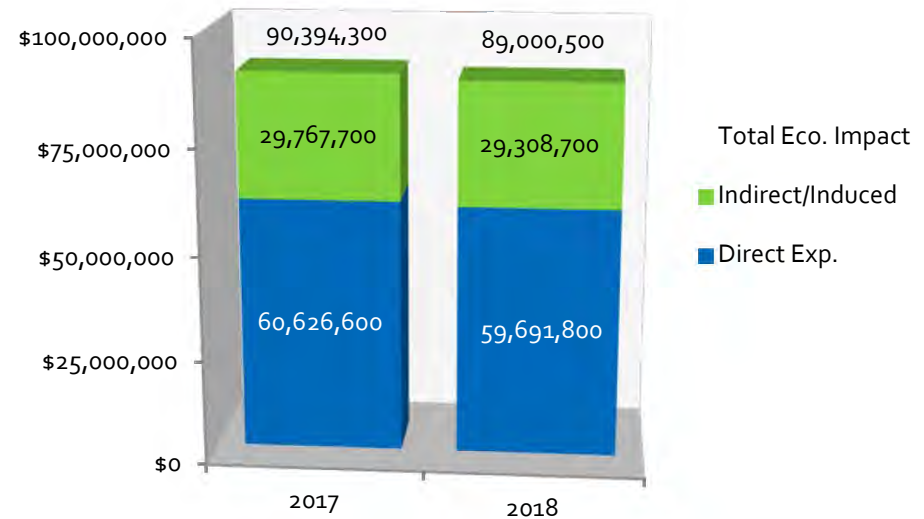
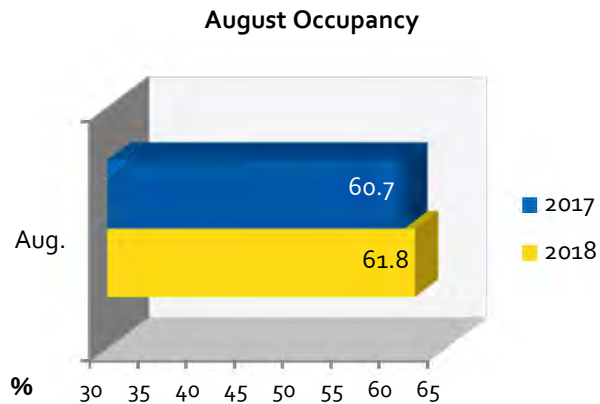


Naples, Marco Island, Everglades Visitor Profile | August 2018

H/M/C+ Visitor Statistics	Year to Date (January – August)			August		% Δ '17/'18
	2017	2018	% Δ '17/'18	2017	2018*	
Visitors (#)	1,275,000	1,284,000	+0.7	107,300	102,800	-4.2
Room Nights	1,678,100	1,660,100	-1.1	148,400	143,600	-3.2
Direct Exp. (\$)	\$1,014,963,700	\$1,054,582,600	+3.9	\$60,626,600	\$59,691,800	-1.5
Total Eco. Impact (\$)	\$1,513,310,900	\$1,572,382,700	+3.9	\$90,394,300	\$89,000,500	-1.5

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

August Economic Impact



August

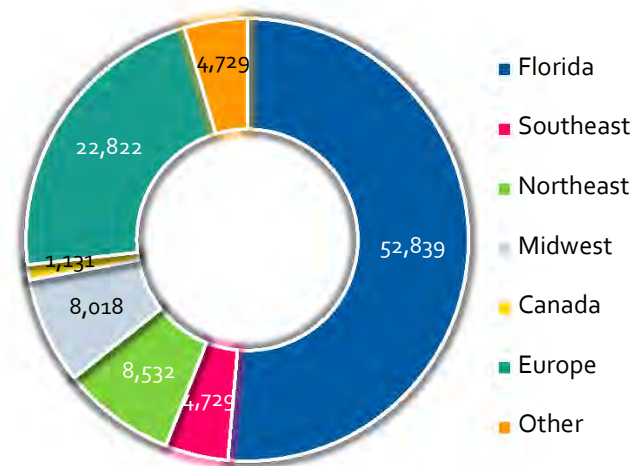
Lodging Statistics	2017	2018**	% Δ '17/'18
Occupancy	60.7%	61.8%	+1.8
Room Rates	\$143.6	\$155.2	+8.1
RevPAR	\$87.2	\$95.9	+10.0

** Note: 969 prime lodging units were closed for renovations

August 2018 Visitor Origin Markets

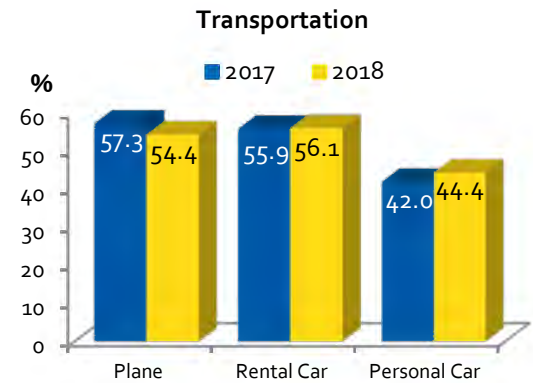
Visitor Origins	2017		2018		% Δ '17/'18
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	49.4%	53,006	51.4%	52,839	-0.3
Southeast	4.2	4,507	4.6	4,729	+4.9
Northeast	7.8	8,369	8.3	8,532	+1.9
Midwest	7.4	7,940	7.8	8,018	+1.0
Canada	1.0	1,073	1.1	1,131	+5.4
Europe	25.3	27,147	22.2	22,822	-15.9
Other	4.9	5,258	4.6	4,729	-10.1
Total	100.0	107,300	100.0	102,800	-4.2

August 2018 Visitor Origins

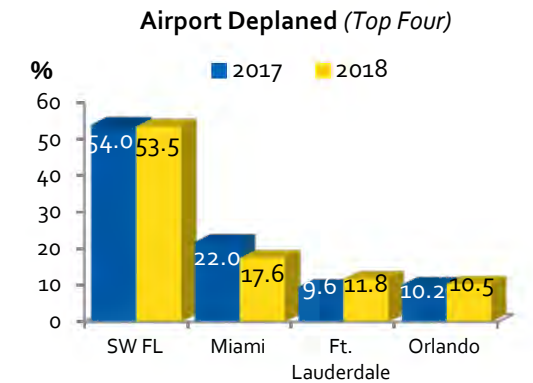


Naples, Marco Island, Everglades Visitor Profile | August 2018

Transportation Mode (Multiple Response)	August 2017	August 2018	
Plane	57.3%	54.4%	↓
Rental Car	55.9	56.1	↑
Personal Car	42.0	44.4	↑

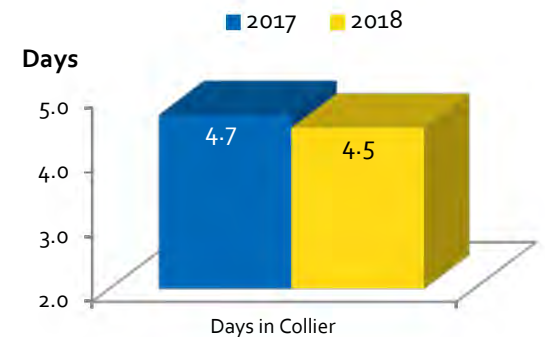


Airport Deplanned (Base: Flew)	August 2017	August 2018	
Southwest Florida International	54.0%	53.5%	↓
Miami International	22.0	17.6	↓
Ft. Lauderdale International	9.6	11.8	↑
Orlando International/Sanford	10.2	10.5	↑
Tampa International	3.4	5.3	↑



Purpose of Trip (Multiple Response)	August 2017	August 2018	
Vacation/Weekend Getaway	81.1%	80.0%	↓
Group Travel	16.6	21.1	↑
Visit with Friends and Relatives	9.7	9.4	↓
Special Event	5.8	6.8	↑

Length of Stay in Collier County (Days)



First Visit to (% yes)	August 2017	August 2018	
Collier County	48.8%	45.2%	↓
Florida	12.8	11.1	↓

Length of Stay (Days)	August 2017	August 2018	
In Collier County	4.7	4.5	↓

Party Size	August 2017	August 2018	
Number of People	2.8	2.6	↓

Naples, Marco Island, Everglades Visitor Profile | August 2018

Party Composition (Multiple Response)	August 2017	August 2018	
Family	40.2%	42.1%	↑
Couple	43.0	40.6	↓
Single	11.5	14.5	↑
Group of Friends	3.4	3.1	↓

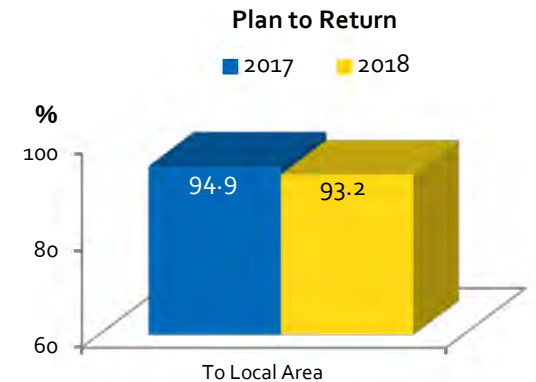
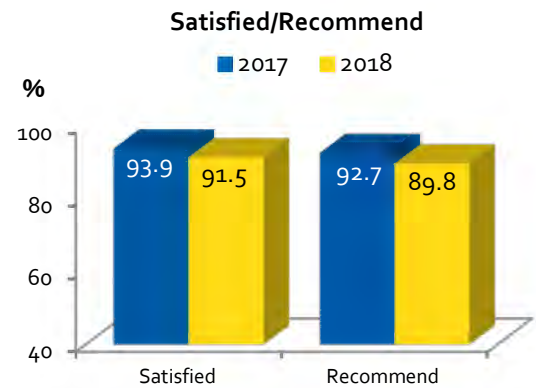
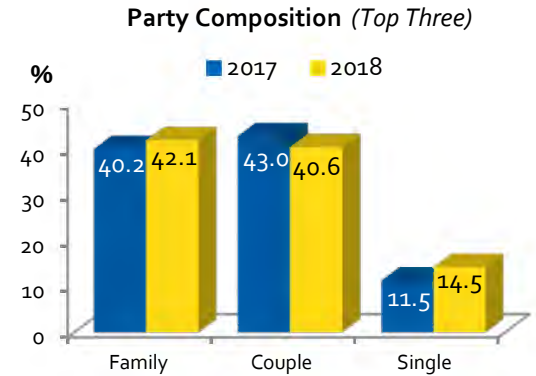
Did Party Have Lodging Reservations for Stay	August 2017	August 2018	
% Yes	93.5%	95.0%	↑

Expense Relative to Expectations	August 2017	August 2018	
More Expensive	23.8%	18.8%	↓
Less Expensive	3.4	6.3	↑
As Expected	71.4	71.9	↑

Satisfaction with Collier County	August 2017	August 2018	
Very Satisfied	86.9%	83.0%	↓
Satisfied	7.0	8.5	↑
Satisfaction Level (Combined)	93.9%	91.5%	↓

Recommend Collier to Friends/Relatives	August 2017	August 2018	
% Yes	92.7%	89.8%	↓

Plan to Return (% Yes)	August 2017	August 2018	
To Local Area	94.9%	93.2%	↓



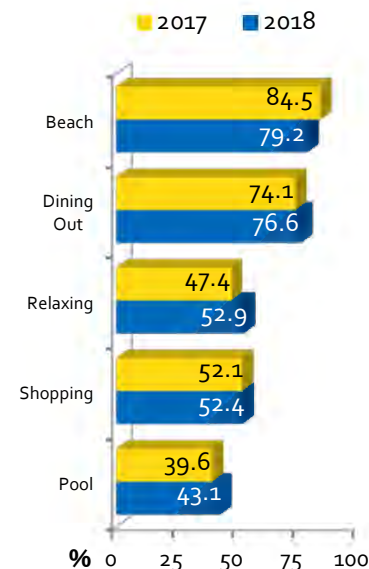
Naples, Marco Island, Everglades Visitor Profile | August 2018

Activities Enjoyed in Area (Multiple Response)	August 2017	August 2018	
Beach	84.5%	79.2%	↓
Dining Out	74.1	76.6	↑
Relaxing	47.4	52.9	↑
Shopping	52.1	52.4	↑
Pool	39.6	43.1	↑
Sunsets	33.3	40.9	↑
Sightseeing	40.1	38.3	↓
Reading	26.2	30.5	↑
Sunning	26.7	28.0	↑
Walking	26.9	23.6	↓
Swimming	23.7	22.4	↓
Bars/Nightlife	16.6	20.8	↑
Enjoying Nature/Bird Watching/Everglades	25.5	20.4	↓
Visiting with Friends/Relatives	13.8	12.5	↓
Shelling	15.3	12.3	↓
Art Galleries/Shows/Fairs	10.9	10.2	↓
Fishing	11.8	7.8	↓
Golfing	6.9	7.4	↑
Boating	9.5	6.9	↓

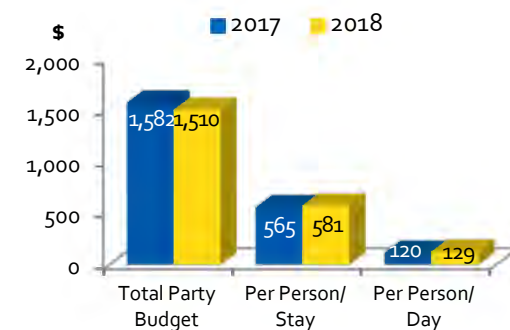
Demographics	August 2017	August 2018	
Average Age Head of Household (Years)	45.7	46.1	↑
Median Annual Household Income	\$153,400	\$155,793	↑

Collier Base Budget	August 2017	August 2018	
Total	\$1,582.05	\$1,509.72	↓
Per Person/Stay	565.02	580.66	↑
Per Person/Day	120.22	129.04	↑

Activities Enjoyed in Area (Top Five)



Collier Base Budgets



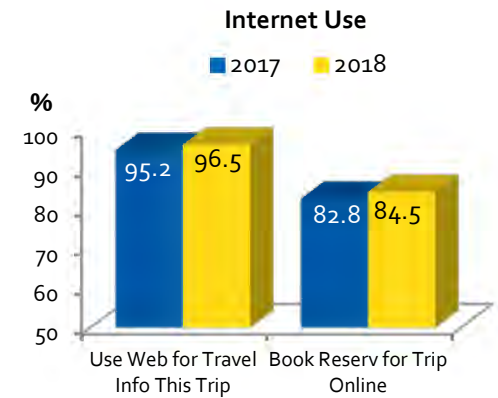
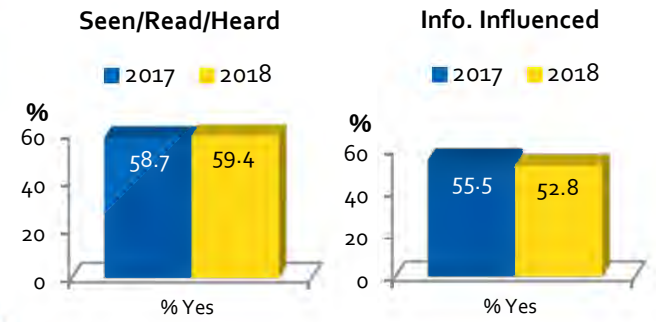
Naples, Marco Island, Everglades Visitor Profile | August 2018

Area Information Seen/Read/Heard	August 2017	August 2018	
% Yes	58.7%	59.4%	↑

Directly Influenced by Information (Base: Seen/Read/Heard Area Information)	August 2017	August 2018	
% Yes	55.5%	52.8%	↓

Why Chose the Area (Multiple Response)	August 2017	August 2018	
Beach Area	58.8%	57.3%	↓
Quality of Accommodations	42.2	49.5	↑
Quiet/Peaceful/Laid Back	43.6	47.5	↑
Previous Experience	32.9	36.5	↑
Relaxing	29.2	36.1	↑
Restaurants	32.9	34.0	↑
Not Crowded	27.5	31.3	↑
Weather	24.9	30.1	↑
Outdoor Recreation/Nature	26.6	25.0	↓
Appealing Brochures/Websites	22.7	23.2	↑
Never Been	25.9	21.9	↓
Recommendation	23.5	19.5	↓
Business/Meeting/Conference	13.1	17.7	↑

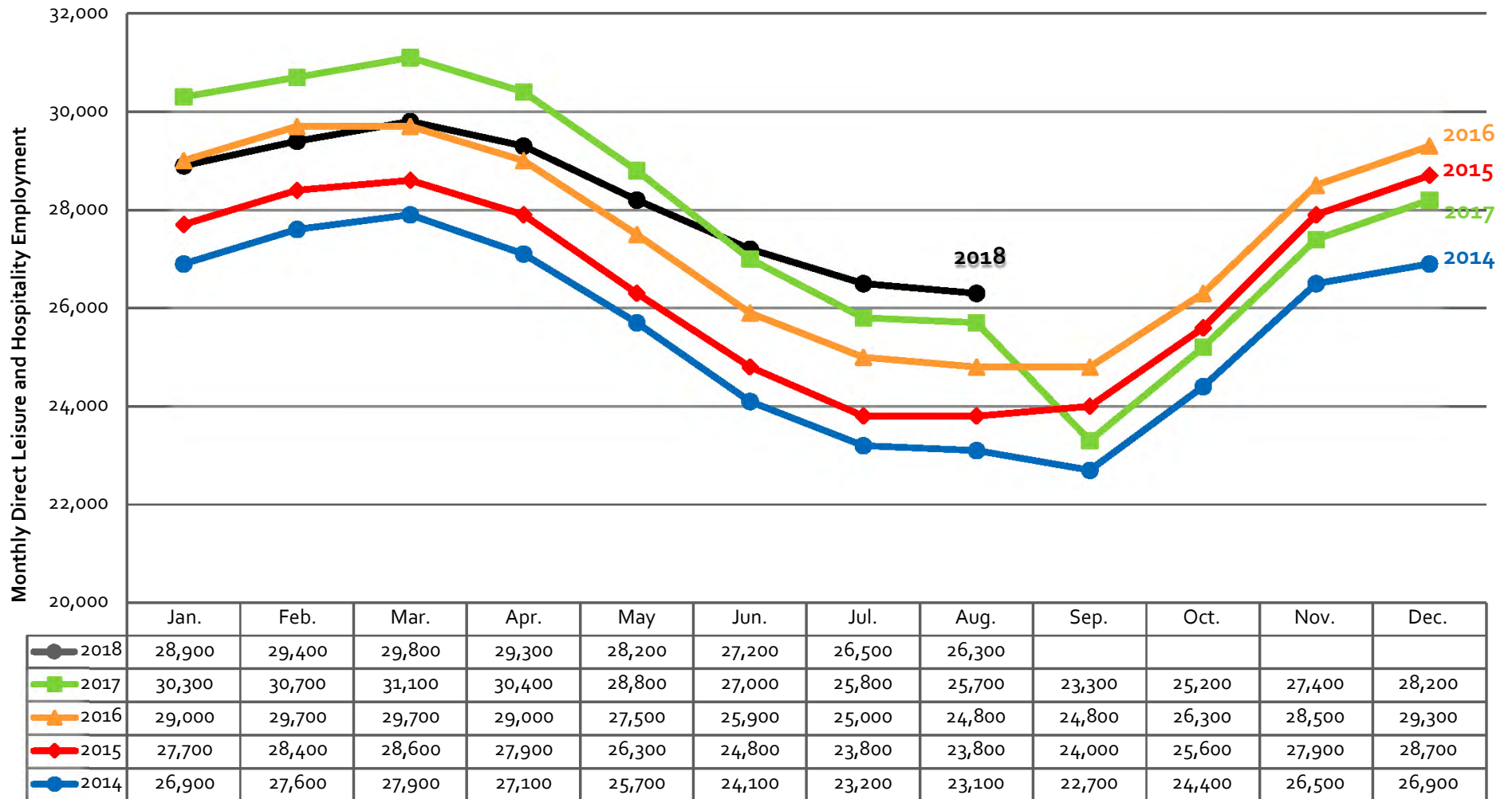
Internet Use	August 2017	August 2018	
Use Internet to Obtain Travel Info for This Trip (% Yes)	95.2%	96.5%	↑
Book Reservations for Trip Online (%Yes)	82.8	84.5	↑



Industry Data: *2014-2018*

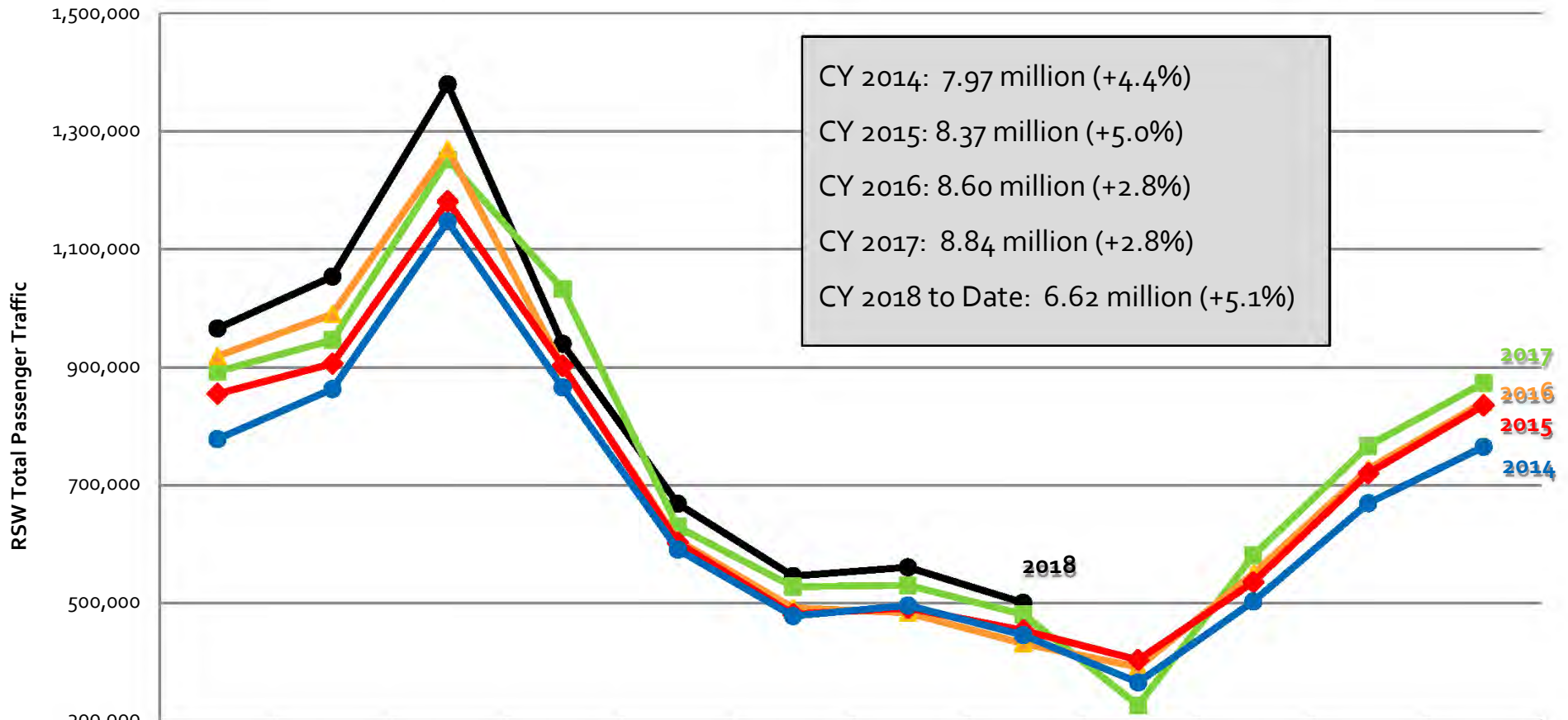


Collier Direct Leisure and Hospitality Employment (Calendar Year) *



* 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				
■ 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