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## Naples, Marco Island, Everglades Convention and Visitors Bureau February 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](http://www.ResearchDataLLC.com)**

March 2017

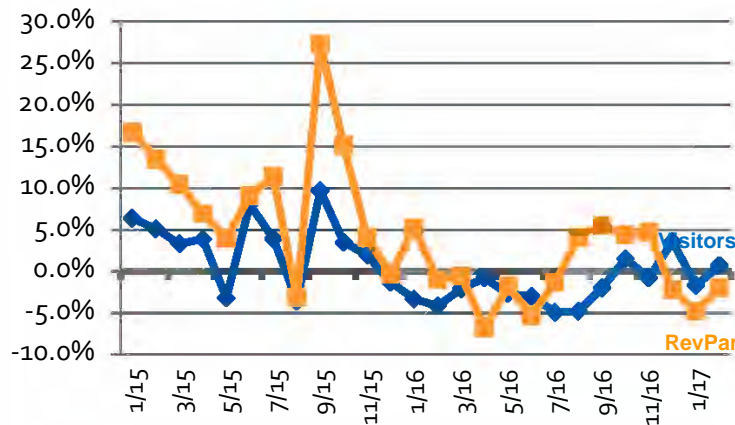
## Naples, Marco Island, Everglades: February 2017 Summary

### Executive Summary: February 2017

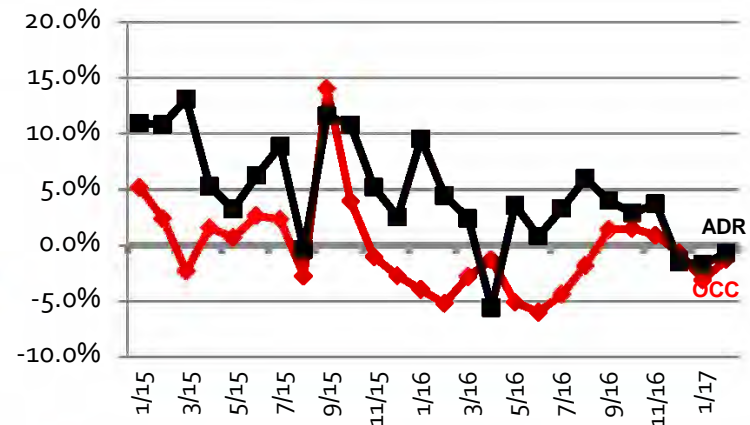
- This February, some **194,700** visitors stayed in Collier's commercial lodgings (+0.7%). Their visits contributed an estimated **\$255,972,900** of economic impact to the County (+2.5%). Key performance metrics are as follows:

	<u>February</u>	<u>2016</u>	<u>2017</u>	<u>% Δ</u>
Occupancy		89.1%	87.9%	-1.3%
ADR		\$353.0	\$350.5	-0.7%
RevPAR		\$314.5	\$308.1	-2.0%

Key Collier Visitation Metrics (%Δ)



Key Collier Visitation Metrics (%Δ)



—◆— % Change Visitors —■— % Change RevPar

—◆— % Change Occupancy —■— % Change ADR

- Compared to last February, nearly three out of every four (**74.1%**) lodging managers report their three month forward reservations levels as "up" or the "same":

#### % of Properties (February)

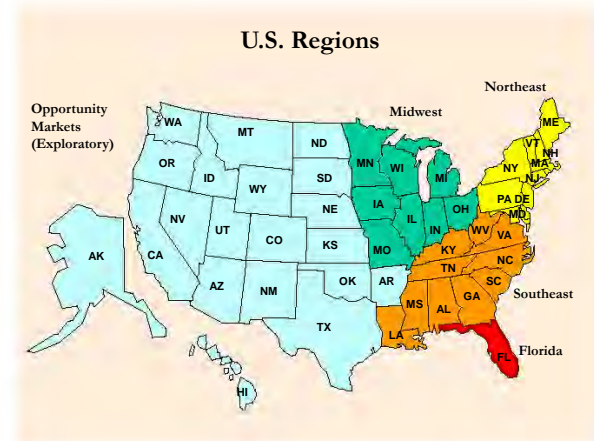
##### Reporting Reservations:

	<u>2016</u>	<u>2017</u>
Up	14.3%	15.6%
Same	37.1	58.5
Down	40.0	25.8

## Naples, Marco Island, Everglades: February 2017 Summary

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

<u>February Visitation</u>	<u>2017 Visitor #</u>	<u>Δ</u>
Florida	43,029	+8.6%
Southeast	14,018	+6.5
Northeast	55,100	-1.4
Midwest	38,551	-1.8
Canada	7,983	-8.2
Europe	27,842	-2.0
West	8,177	-1.6
<b>Total</b>	<b>194,700</b>	<b>+0.7%</b>



4. This February, nearly seven out of every ten of the destination's patrons flew (**2016: 69.1%; 2017: 68.5%**). A majority of these (**66.7%**) deplaned at RSW, with Miami capturing some **16.1%** of deplanements.
5. The typical February visitor party includes an average of **2.6** travelers who stay for **3.2** nights in the Naples, Marco Island, Everglades area.
6. Some **35.8%** of Collier's February visitors are in the destination for the first time (**2016: 38.0%**).
7. Fully **97.3%** consulted the web for trip information, with some **77.7%** making bookings for their trip online.
8. The vast majority (**96.2%**) are satisfied with their Collier stay, with **92.2%** planning a future trip to the area (**2016: 93.2%**).
9. This year, February visitors average **53.3** years of age (**2016: 52.8 years of age**).

# Naples, Marco Island, Everglades:

## *February 2017 Visitor Profile*



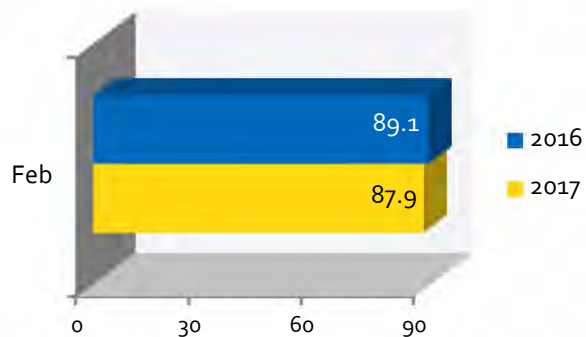
# Naples, Marco Island, Everglades Visitor Profile February 2017

H/M/C* Visitor Statistics	Calendar Year (Jan. – Dec.)			February		% Δ '16/'17
	2015	2016	% Δ '15/'16	2016**	2017	
Visitors (#)	1,829,500	1,793,700	-2.0	193,300	194,700	+0.7
Room Nights	2,512,400	2,429,700	-3.3	257,600	248,700	-3.5
Direct Exp. (\$)	\$1,311,630,200	\$1,328,627,700	+1.3	\$167,527,300	\$171,678,700	+2.5
<b>Total Eco. Impact (\$)</b>	<b>\$1,955,640,500</b>	<b>\$1,980,983,900</b>	<b>+1.3</b>	<b>\$249,783,200</b>	<b>\$255,972,900</b>	<b>+2.5</b>

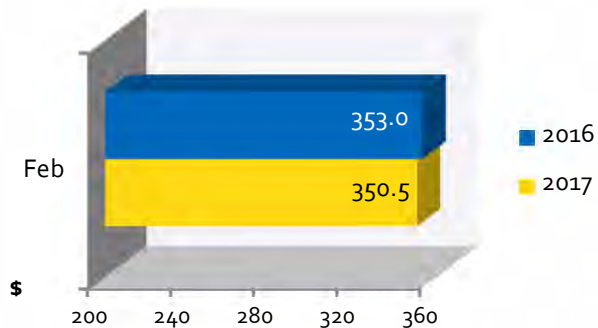
\* Visitors staying in commercial lodging subject to the resort tax (hotel/motel/condo, etc.)

\*\* Please note February 2016 was a leap year

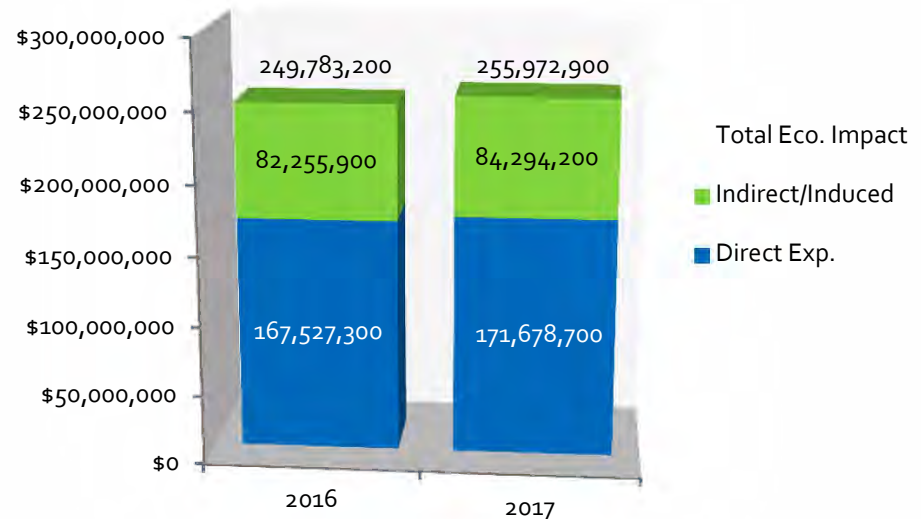
February Occupancy



February Room Rates



February Economic Impact



February

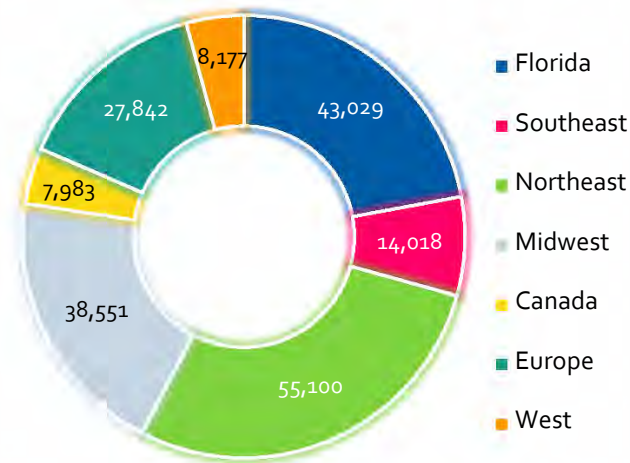
Lodging Statistics	2016	2017**	% Δ '16/'17
Occupancy	89.1%	87.9%	-1.3
Room Rates	\$353.0	\$350.5	-0.7
RevPAR	\$314.5	\$308.1	-2.0

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

### February 2017 Visitor Origin Markets

Visitor Origins	2016		2017		% Δ '16/'17
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	20.5%	39,627	22.1%	43,029	+8.6
Southeast	6.8	13,144	7.2	14,018	+6.6
Northeast	28.9	55,864	28.3	55,100	-1.4
Midwest	20.3	39,240	19.8	38,551	-1.8
Canada	4.5	8,698	4.1	7,983	-8.2
Europe	14.7	28,415	14.3	27,842	-2.0
West	4.3	8,312	4.2	8,177	-1.6
<b>Total</b>	<b>100.0</b>	<b>193,300</b>	<b>100.0</b>	<b>194,700</b>	<b>+0.7</b>

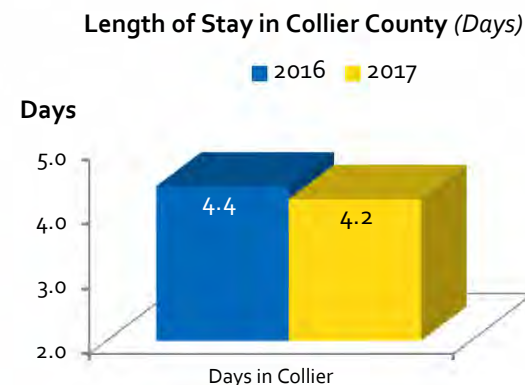
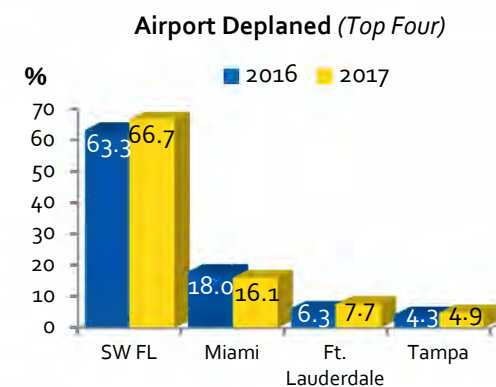
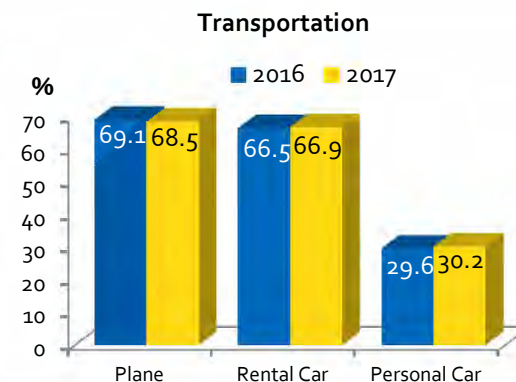
### February 2017 Visitor Origins





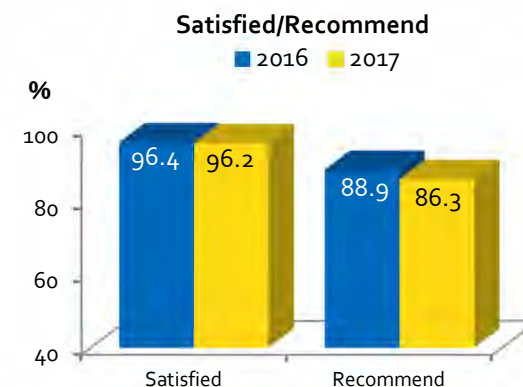
# Naples, Marco Island, Everglades Visitor Profile February 2017

Transportation Mode (Multiple Response)	February 2016	February 2017
Plane	69.1%	68.5%
Rental Car	66.5	66.9
Personal Car	29.6	30.2
Airport Deplaned (Base: Flew)	February 2016	February 2017
Southwest Florida International	63.3%	66.7%
Miami International	18.0	16.1
Ft. Lauderdale International	6.3	7.7
Tampa International	4.3	4.9
Orlando International/Sanford	5.1	3.2
Purpose of Trip (Multiple Response)	February 2016	February 2017
Vacation/Weekend Getaway	78.6%	75.9%
Group Travel	34.7	35.2
Visit with Friends and Relatives	14.9	16.7
First Visit to (% yes)	February 2016	February 2017
Collier County	38.0%	35.8%
Florida	4.5	4.1
Length of Stay (Days)	February 2016	February 2017
In Collier County	4.4	4.2
Party Size	February 2016	February 2017
Number of People	2.5	2.6
Party Composition (Multiple Response)	February 2016	February 2017
Couple	62.0%	60.2%
Family	25.0	28.6
Single	13.1	11.0
Group of Couples	5.8	6.9

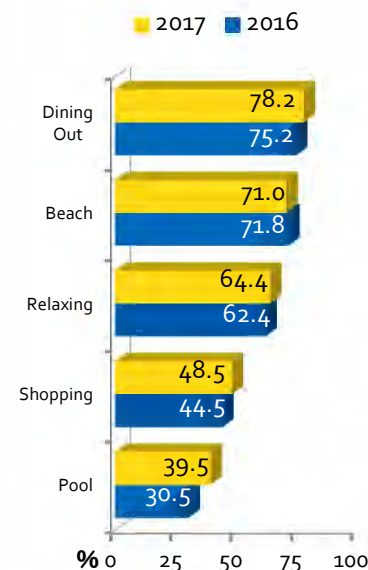


# Naples, Marco Island, Everglades Visitor Profile February 2017

Did Party Have Lodging Reservations for Stay	February 2016	February 2017
% Yes	96.5%	96.2%
Satisfaction with Collier County	February 2016	February 2017
Very Satisfied	80.4%	79.4%
Satisfied	16.0	16.8
<b>Satisfaction Level (Combined)</b>	<b>96.4%</b>	<b>96.2%</b>
Activities Enjoyed in Area (Multiple Response)	February 2016	February 2017
Dining Out	75.2%	78.2%
Beach	71.8	71.0
Relaxing	62.4	64.4
Shopping	44.5	48.5
Pool	30.5	39.5
Walking	28.3	32.5
Enjoying Nature/Bird Watching/Everglades	22.9	25.0
Visiting with Friends/Relatives	22.6	24.8
Sunsets	23.7	24.3
Sunning	15.5	21.9
Art Galleries/Shows/Fairs	15.8	19.8
Sightseeing	15.7	18.2
Bars/Nightlife	16.0	17.2
Reading	17.7	16.1
Swimming	13.9	15.7
Golfing	9.9	10.3
Expense Relative to Expectations	February 2016	February 2017
More Expensive	32.5%	35.6%
Less Expensive	1.9	1.1
As Expected	58.3	62.1
Demographics	February 2016	February 2017
Average Age Head of Household (Years)	52.8	53.3
Median Annual Household Income	\$167,224	\$171,891



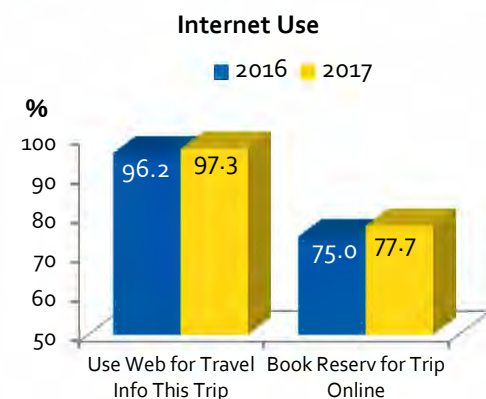
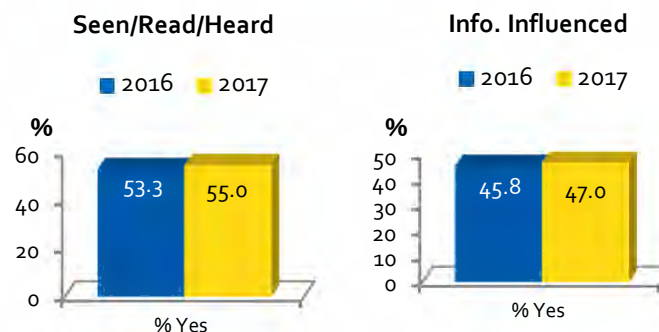
**Activities Enjoyed in Area (Top Five)**





# Naples, Marco Island, Everglades Visitor Profile February 2017

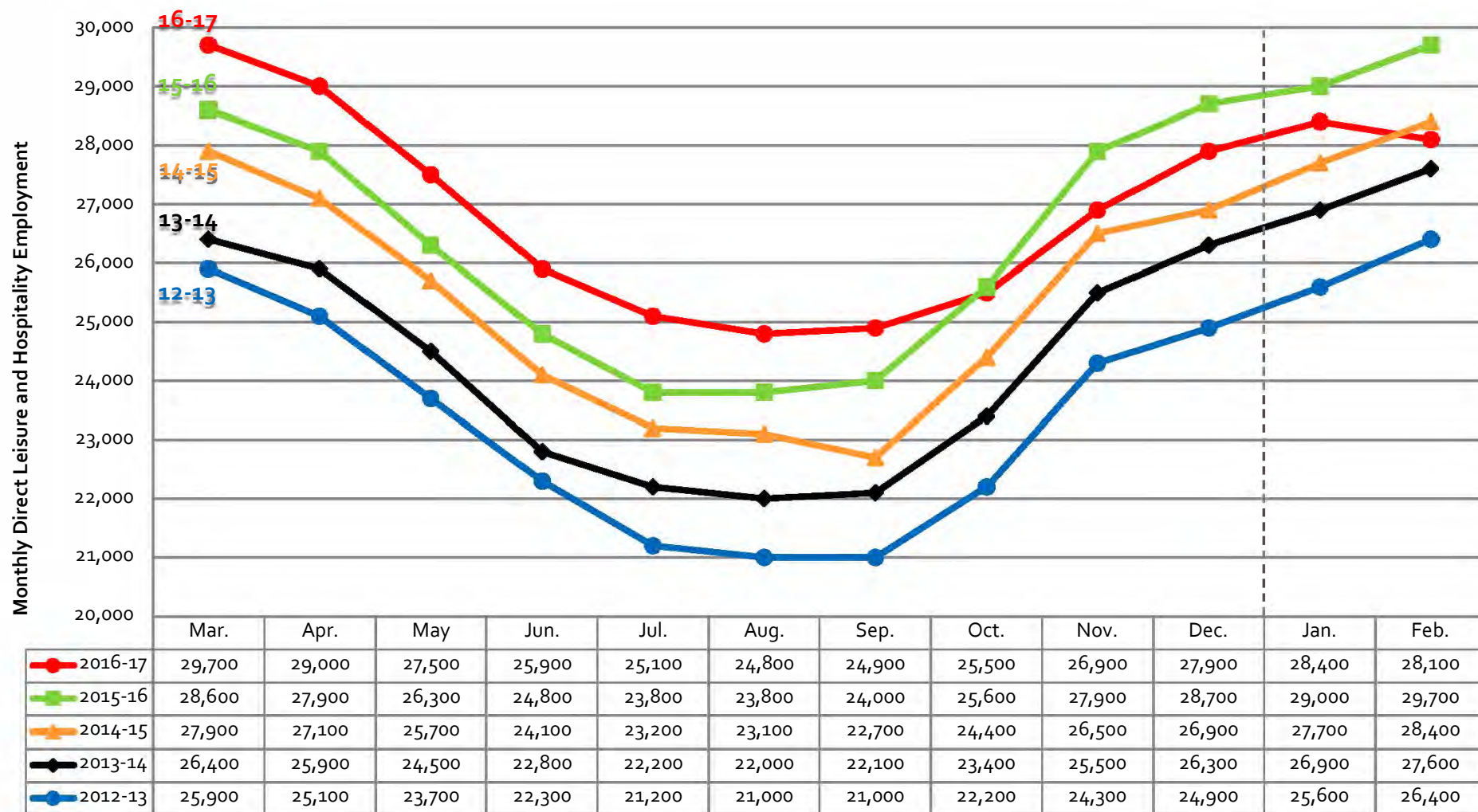
<b>Recommend Collier to Friends/Relatives</b>	February 2016	February 2017
% Yes	88.9%	86.3%
<b>Plan to Return (% Yes)</b>	February 2016	February 2017
To Local Area	93.2%	92.2%
<b>Collier Base Budget</b>	February 2016	February 2017
Total	\$2,166.67	\$2,292.57
Per Person/Stay	866.67	881.76
Per Person/Day	196.97	209.94
<b>Area Information Seen/Read/Heard</b>	February 2016	February 2017
% Yes	53.3%	55.0%
<b>Directly Influenced by Information</b> (Base: Seen/Read/Heard Area Information)	February 2016	February 2017
% Yes	45.8%	47.0%
<b>Why Chose the Area (Multiple Response)</b>	February 2016	February 2017
Weather	53.7%	58.8%
Beach Area	55.3	54.5
Relaxing	39.4	41.7
Business/Meeting/Conference	33.2	35.8
Previous Experience	32.7	34.4
Quiet/Peaceful/Laid Back	28.2	33.0
Restaurants	26.2	29.5
Outdoor Recreation/Nature	30.1	27.3
Recommendation	25.6	27.3
Quality of Accommodations	27.2	24.7
Never Been	26.5	23.9
Appealing Brochures/Websites	23.4	21.4
Not Crowded	13.6	14.8
<b>Internet Use</b>	February 2016	February 2017
Use Internet to Obtain Travel Info for This Trip (% Yes)	96.2%	97.3%
Book Reservations for Trip Online (%Yes)	75.0	77.7



## Industry Data: *2012-2016*



## 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

