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Naples, Marco Island, Everglades Convention and Visitors Bureau February 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

March 2018

Naples, Marco Island, Everglades: February 2018 Summary

Executive Summary: February 2018

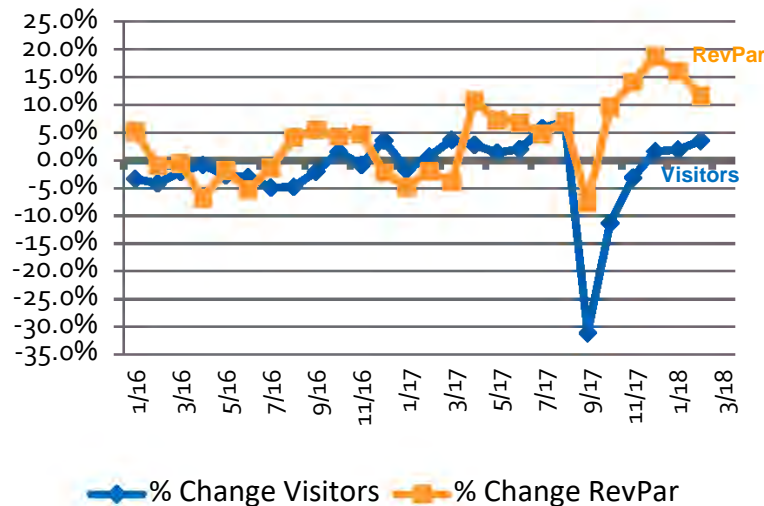
- This February, some **201,600** visitors stayed in Collier's commercial lodgings **(+3.5%)***. Their visits contributed an estimated **\$276,917,500** of economic impact to the County **(+8.2%)**. Key performance metrics are as follows:

<u>February</u>	<u>2017</u>	<u>2018**</u>	<u>% Δ</u>
Occupancy	87.9%	93.6%	+6.5%
ADR	\$350.5	\$367.7	+4.9%
RevPAR	\$308.1	\$344.2	+11.7%

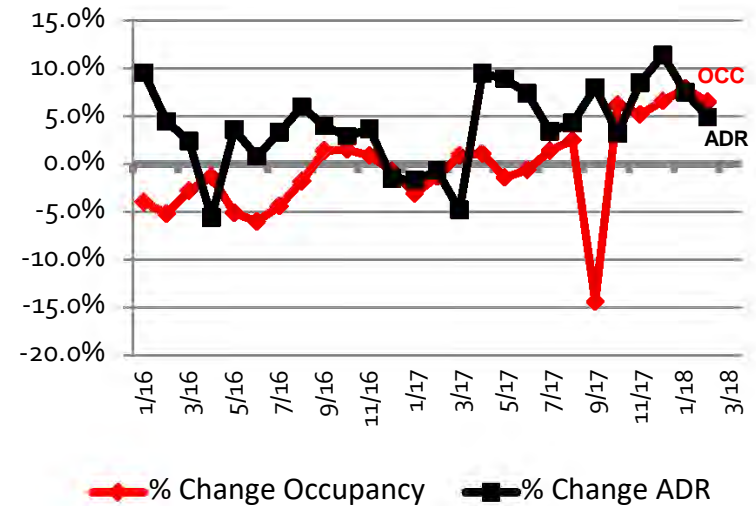
* As of February 2018, approximately 660 lodging units remain closed due to the impact of Hurricane Irma and restorations.

** Based on units available to be rented.

Key Collier Visitation Metrics (%Δ)



Key Collier Visitation Metrics (%Δ)



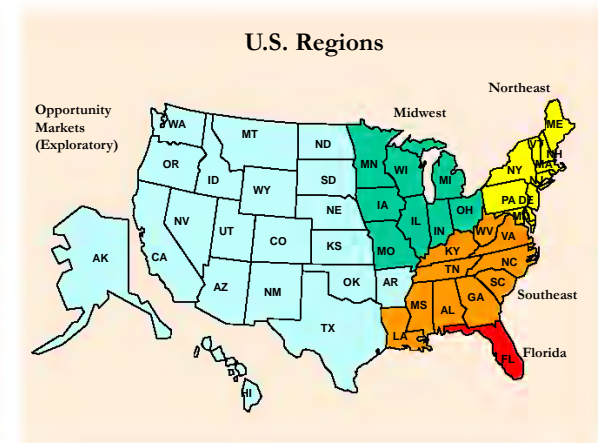
Naples, Marco Island, Everglades: February 2018 Summary

2. Compared to last February, over half (**56.5%**) of Collier lodging managers report their three month forward reservations levels as “up.”

% of Properties (February)		
<u>Reporting Reservations:</u>	<u>2017</u>	<u>2018</u>
Up	15.6%	56.5%
Same	58.5	41.5
Down	25.8	2.0

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

<u>February Visitation</u>	<u>2018</u> <u>Visitor #</u>	<u>Δ</u>
Florida	43,344	+0.7%
Southeast	15,523	+10.7
Northeast	56,045	+1.7
Midwest	41,328	+7.2
Canada	7,257	-9.1
Europe	27,821	-0.1
West	10,282	+25.7
Total	201,600	+3.5%



4. This February, nearly seven out of every ten of the destination’s visitor parties flew (**2017: 68.5%; 2018: 68.8%**). A majority of these (**65.6%**) deplaned at RSW, with Miami capturing some **16.8%** of deplanements.
5. This February, visitor party size averaged **2.7** travelers who stayed for **3.3** nights in the Naples, Marco Island, Everglades area (**2017: 2.6 people; 3.2 nights**).

Naples, Marco Island, Everglades: February 2018 Summary

6. Some **33.5%** of Collier's February visitors are in the destination for the first time.
7. Fully **96.1%** consult the web for trip information, with some **76.5%** making bookings for their trip online.
8. The vast majority (**97.5%**) are satisfied with their Collier stay, with **93.0%** planning a future trip to the area.
9. The typical February visitor is **53.2 years of age (2017: 53.3 years)**.

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

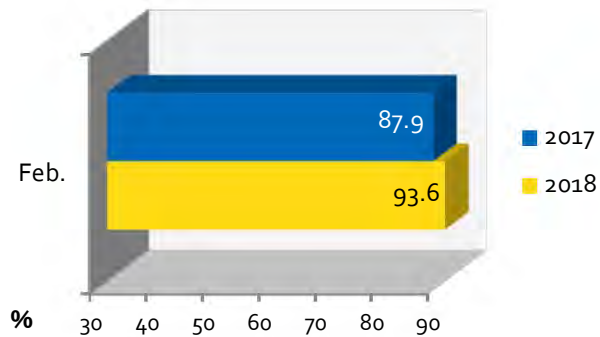


Naples, Marco Island, Everglades Visitor Profile | February 2018

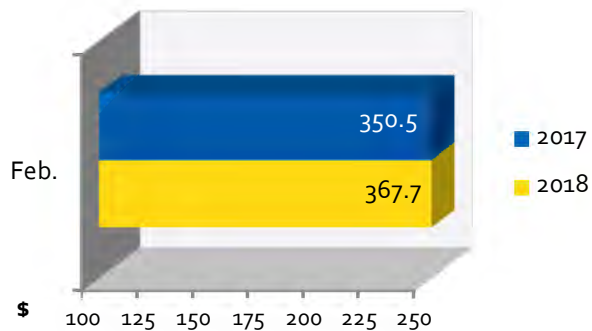
H/M/C+ Visitor Statistics	Calendar Year (January – December)			February		% Δ '17/'18
	2016	2017	% Δ '16/'17	2017	2018*	
Visitors (#)	1,793,700	1,774,800	-1.1	194,700	201,600	+3.5
Room Nights	2,429,700	2,364,300	-2.7	248,700	246,400	-0.9
Direct Exp. (\$)	\$1,328,627,700	\$1,373,918,000	+3.4	\$171,678,700	\$185,726,000	+8.2
Total Eco. Impact (\$)	\$1,980,983,800	\$2,048,511,800	+3.4	\$255,972,900	\$276,917,500	+8.2

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

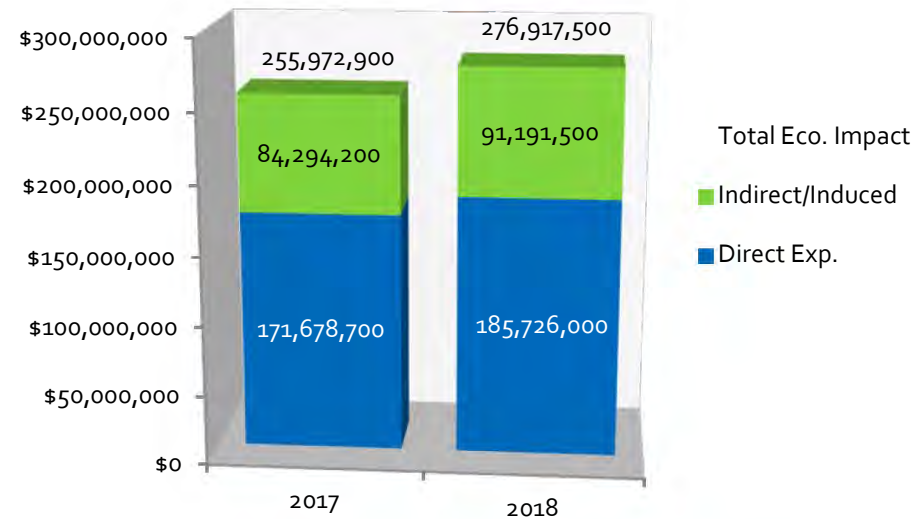
February Occupancy



February Room Rates



February Economic Impact



February

Lodging Statistics	2017	2018**	% Δ '17/'18
Occupancy	87.9%	93.6%	+6.5
Room Rates	\$350.5	\$367.7	+4.9
RevPAR	\$308.1	\$344.2	+11.7

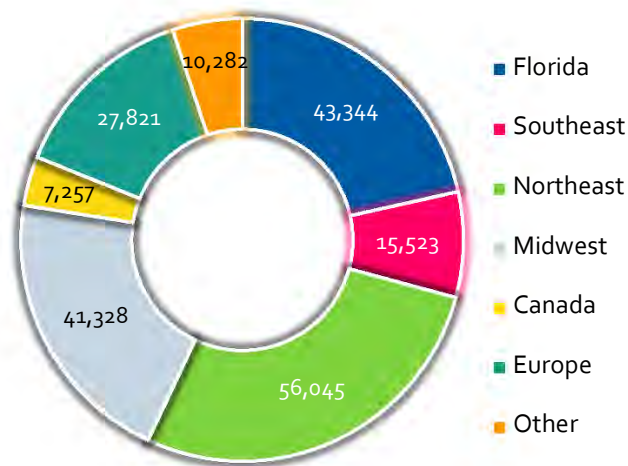
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February 2018 Visitor Origin Markets

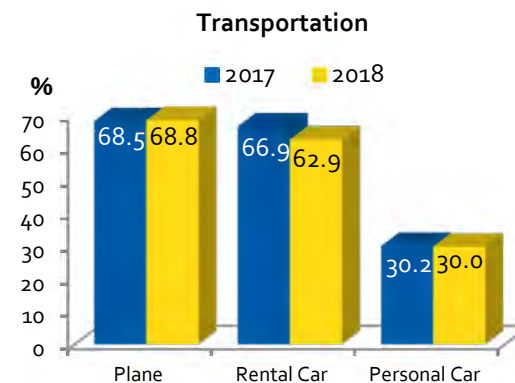
Visitor Origins	2017		2018		% Δ '17/'18
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	22.1%	43,029	21.5%	43,344	+0.7
Southeast	7.2	14,018	7.7	15,523	+10.7
Northeast	28.3	55,100	27.8	56,045	+1.7
Midwest	19.8	38,551	20.5	41,328	+7.2
Canada	4.1	7,983	3.6	7,257	-9.1
Europe	14.3	27,842	13.8	27,821	-0.1
Other	4.2	8,177	5.1	10,282	+25.7
Total	100.0	194,700	100.0	201,600	+3.5

February 2018 Visitor Origins

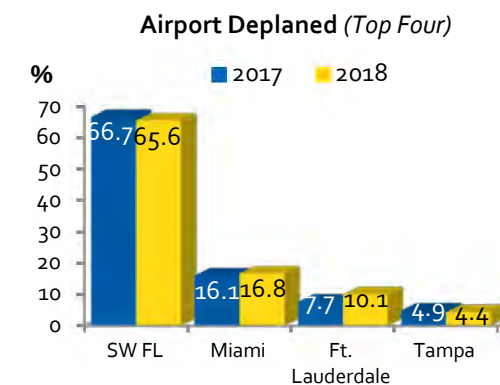


Naples, Marco Island, Everglades Visitor Profile | February 2018

Transportation Mode (Multiple Response)	February 2017	February 2018	
Plane	68.5%	68.8%	↑
Rental Car	66.9	62.9	↓
Personal Car	30.2	30.0	↓

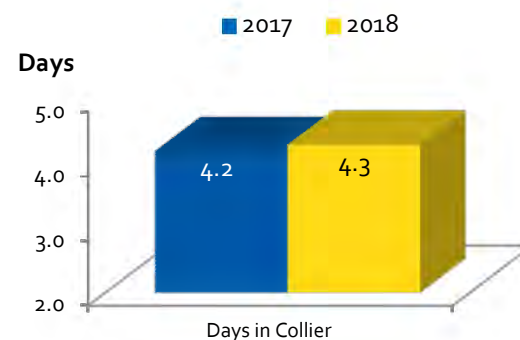


Airport Deplanned (Base: Flew)	February 2017	February 2018	
Southwest Florida International	66.7%	65.6%	↓
Miami International	16.1	16.8	↑
Ft. Lauderdale International	7.7	10.1	↑
Tampa International	4.9	4.4	↓
Orlando International/Sanford	3.2	2.4	↓



Purpose of Trip (Multiple Response)	February 2017	February 2018	
Vacation/Weekend Getaway	75.9%	73.3%	↓
Group Travel	35.2	37.0	↑
Visit with Friends and Relatives	16.7	14.2	↓
Special Event	--	5.1	

Length of Stay in Collier County (Days)



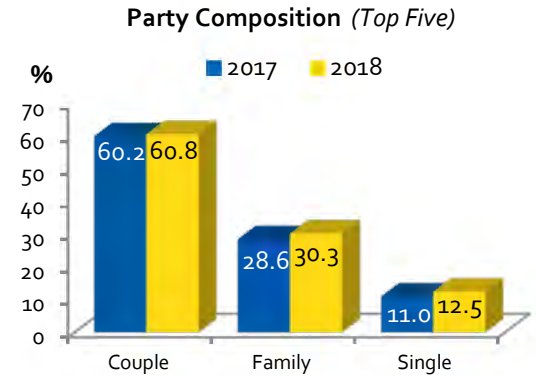
First Visit to (% yes)	February 2017	February 2018	
Collier County	35.8%	33.5%	↓
Florida	4.1	5.3	↑

Length of Stay (Days)	February 2017	February 2018	
In Collier County	4.2	4.3	↑

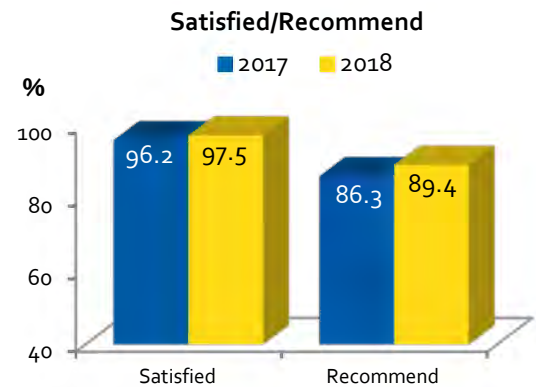
Party Size	February 2017	February 2018	
Number of People	2.6	2.7	↑

Naples, Marco Island, Everglades Visitor Profile | February 2018

Party Composition (Multiple Response)	February 2017	February 2018	
Couple	60.2%	60.8%	↑
Family	28.6	30.3	↑
Single	11.0	12.5	↑
Group of Couples	6.9	5.8	↓

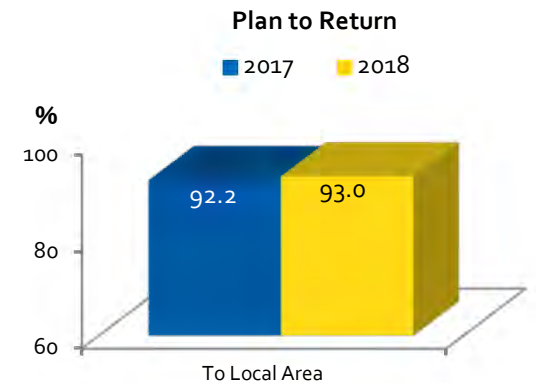


Did Party Have Lodging Reservations for Stay	February 2017	February 2018	
% Yes	96.2%	94.7%	↓



Expense Relative to Expectations	February 2017	February 2018	
More Expensive	35.6%	21.5%	↓
Less Expensive	1.1	1.8	↑
As Expected	62.1	75.4	↑

Satisfaction with Collier County	February 2017	February 2018	
Very Satisfied	79.4%	81.8%	↑
Satisfied	16.8	15.7	↓
Satisfaction Level (Combined)	96.2%	97.5%	↑



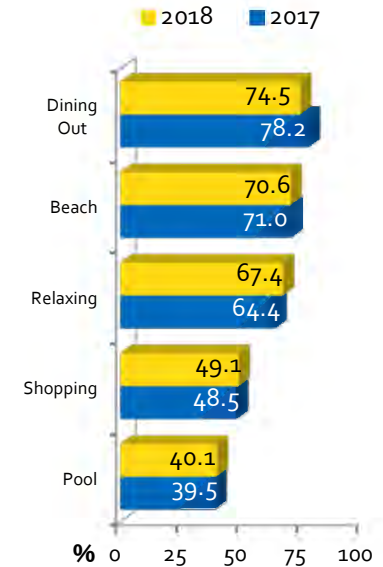
Recommend Collier to Friends/Relatives	February 2017	February 2018	
% Yes	86.3%	89.4%	↑

Plan to Return (% Yes)	February 2017	February 2018	
To Local Area	92.2%	93.0%	↑

Naples, Marco Island, Everglades Visitor Profile | February 2018

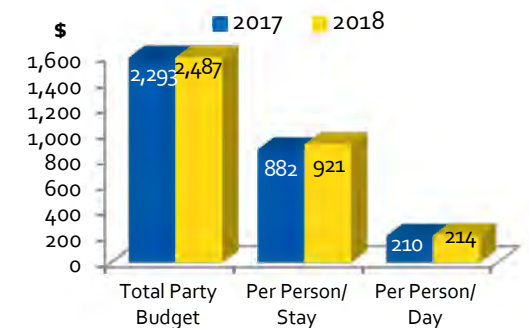
Activities Enjoyed in Area (Multiple Response)	February 2017	February 2018	
Dining Out	78.2%	74.5%	↓
Beach	71.0	70.6	↓
Relaxing	64.4	67.4	↑
Shopping	48.5	49.1	↑
Pool	39.5	40.1	↑
Walking	32.5	33.4	↑
Enjoying Nature/Bird Watching/Everglades	25.0	29.6	↑
Visiting with Friends/Relatives	24.8	22.8	↓
Sunsets	24.3	22.3	↓
Bars/Nightlife	17.2	19.8	↑
Reading	16.1	18.6	↑
Sunning	21.9	18.2	↓
Art Galleries/Shows/Fairs	19.8	18.0	↓
Sightseeing	18.2	14.5	↓
Swimming	15.7	12.3	↓
Golfing	10.3	8.8	↓

Activities Enjoyed in Area (Top Five)



Demographics	February 2017	February 2018	
Average Age Head of Household (Years)	53.3	53.2	↓
Median Annual Household Income	\$171,891	\$170,268	↓

Collier Base Budgets



Collier Base Budget	February 2017	February 2018	
Total	\$2,292.57	\$2,487.40	↑
Per Person/Stay	881.76	921.26	↑
Per Person/Day	209.94	214.25	↑

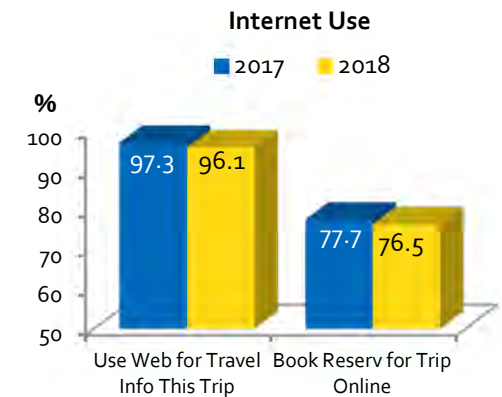
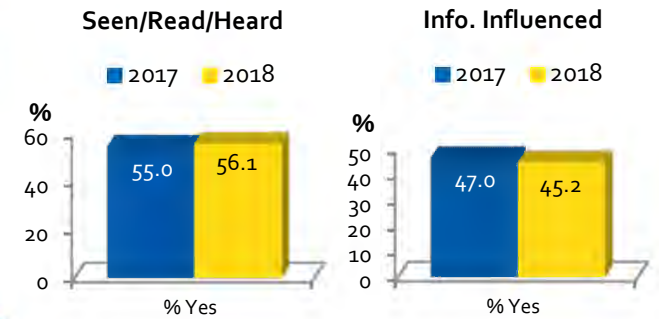
Naples, Marco Island, Everglades Visitor Profile | February 2018

Area Information Seen/Read/Heard	February 2017	February 2018	
% Yes	55.0%	56.1%	↑

Directly Influenced by Information (Base: Seen/Read/Heard Area Information)	February 2017	February 2018	
% Yes	47.0%	45.2%	↓

Why Chose the Area (Multiple Response)	February 2017	February 2018	
Weather	58.8%	54.1%	↓
Beach Area	54.5	50.9	↓
Relaxing	41.7	42.1	↑
Business/Meeting/Conference	35.8	36.2	↑
Previous Experience	34.4	35.9	↑
Quiet/Peaceful/Laid Back	33.0	30.8	↓
Outdoor Recreation/Nature	27.3	29.8	↑
Restaurants	29.5	26.3	↓
Recommendation	27.3	24.2	↓
Quality of Accommodations	24.7	23.6	↓
Never Been	23.9	22.6	↓
Appealing Brochures/Websites	21.4	19.7	↓
Not Crowded	14.8	13.0	↓

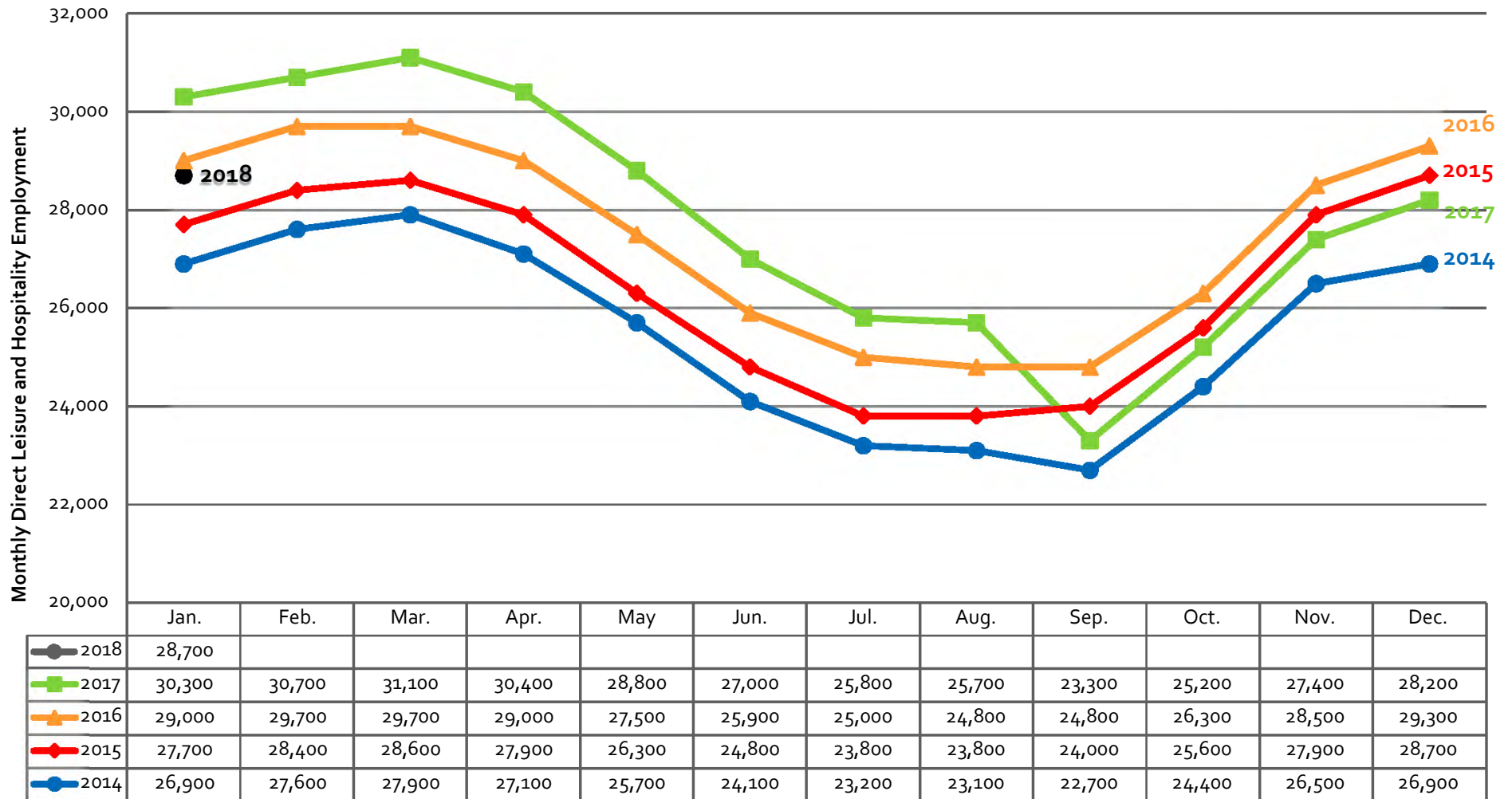
Internet Use	February 2017	February 2018	
Use Internet to Obtain Travel Info for This Trip (% Yes)	97.3%	96.1%	↓
Book Reservations for Trip Online (%Yes)	77.7	76.5	↓



Industry Data: *2014-2018*

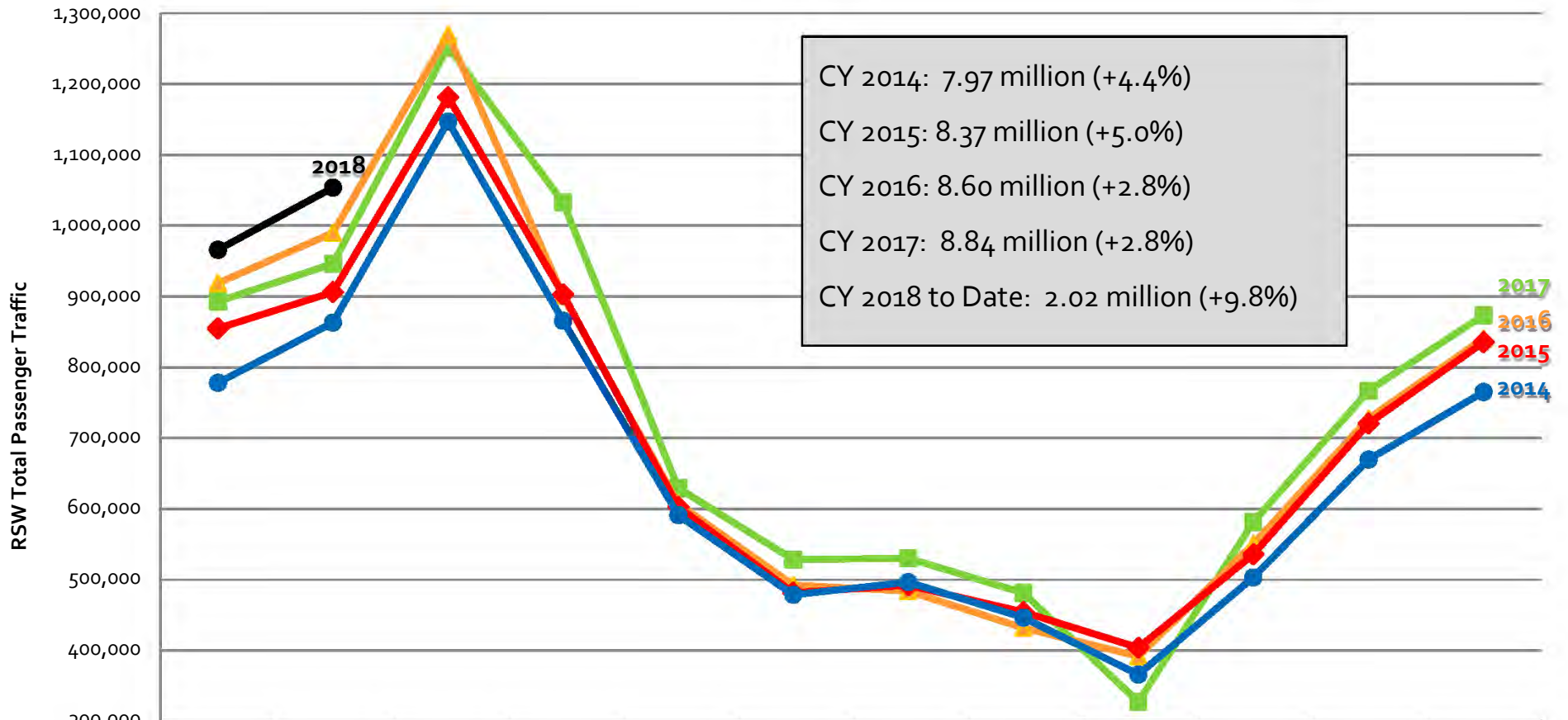


Collier Direct Leisure and Hospitality Employment (Calendar Year) *



* 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