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Naples, Marco Island, Everglades Convention and Visitors Bureau January 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

February 2018

Naples, Marco Island, Everglades: January 2018 Summary

Executive Summary: January 2018

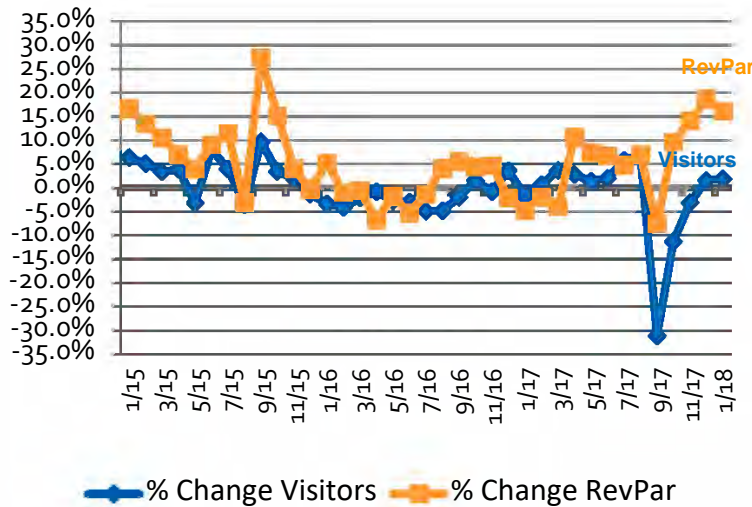
- This January, some **186,100** visitors stayed in Collier's commercial lodgings **(+1.9%)***. Their visits contributed an estimated **\$180,192,300** of economic impact to the County **(+4.9)**. Key performance metrics are as follows:

<u>January</u>	<u>2017</u>	<u>2018**</u>	<u>% Δ</u>
Occupancy	77.3%	83.4%	+7.9%
ADR	\$230.9	\$248.3	+7.5%
RevPAR	\$178.5	\$207.1	+16.0%

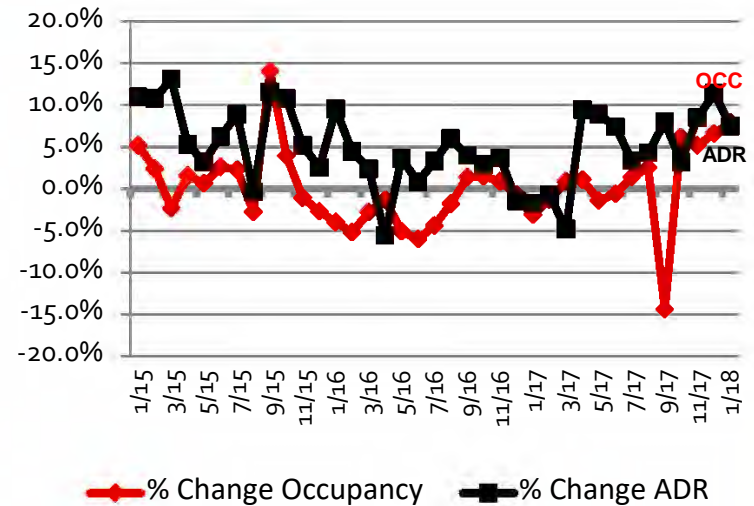
* Available records suggest that approximately 660 lodging units were closed in January 2018 due to the impact of Hurricane Irma and ongoing restorations.

** Based on units available to be rented.

Key Collier Visitation Metrics (%Δ)



Key Collier Visitation Metrics (%Δ)



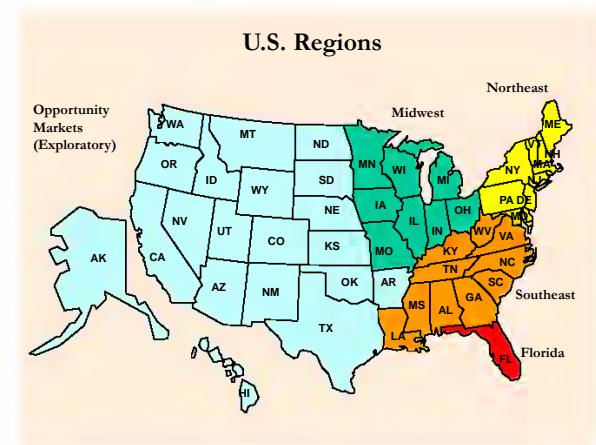
Naples, Marco Island, Everglades: January 2018 Summary

2. Compared to last January, three out of every five (**62.5%**) Collier lodging managers report their three month forward reservations levels as “up.”

% of Properties (January)		
<u>Reporting Reservations:</u>		
	<u>2017</u>	<u>2018</u>
Up	27.5%	62.5%
Same	52.7	33.3
Down	19.8	4.2

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

<u>January Visitation</u>	<u>2018</u> <u>Visitor #</u>	<u>Δ</u>
Florida	57,877	+6.0%
Southeast	11,910	+16.5
Northeast	49,503	-0.7
Midwest	31,637	-1.6
Canada	3,164	-8.8
Europe	23,262	-4.9
West	8,747	+11.4
Total	186,100	+1.9%



4. This January, six out of every ten of the destination’s visitor parties flew (**2017: 64.4%; 2018: 63.5%**). A majority of these (**68.4%**) deplaned at RSW, with Miami capturing some **12.8%** of deplanements.
5. This January, visitor party size averaged **2.4** travelers who stayed for **3.1** nights in the Naples, Marco Island, Everglades area (**2017: 2.3 people; 3.2 nights**).

Naples, Marco Island, Everglades: January 2018 Summary

- 6.** Some **39.9%** of Collier's January visitors are in the destination for the first time.
- 7.** Fully **92.9%** consult the web for trip information, with some **79.1%** making bookings for their trip online.
- 8.** The vast majority (**95.0%**) are satisfied with their Collier stay, with **91.1%** planning a future trip to the area.
- 9.** The typical January visitor is **51.8 years of age (2017: 51.4 years)**.

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

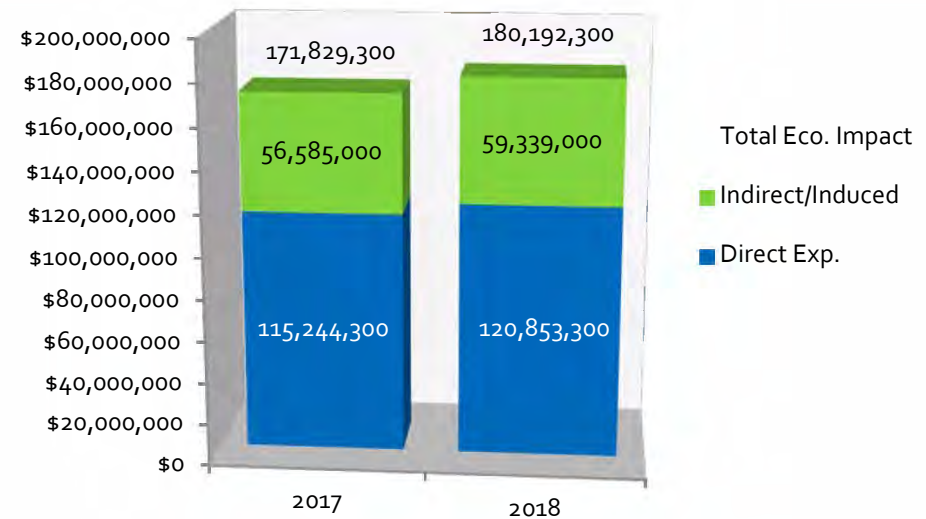
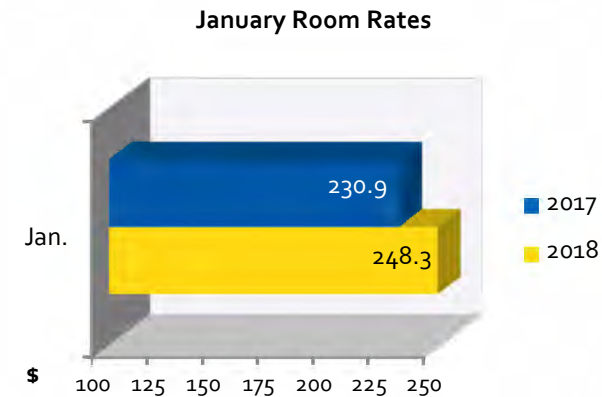
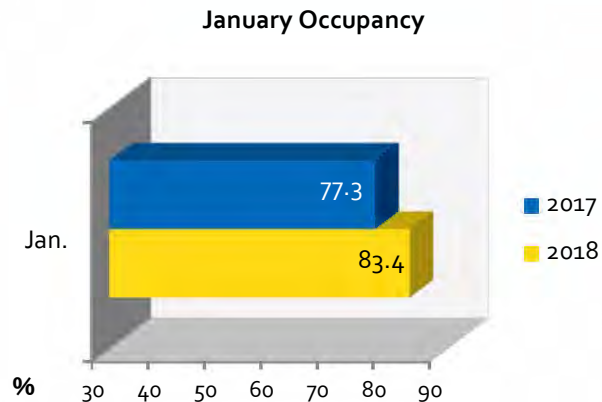


Naples, Marco Island, Everglades Visitor Profile | January 2018

H/M/C+ Visitor Statistics	Calendar Year (January – December)			January		% Δ '17/'18
	2016	2017	% Δ '16/'17	2017	2018*	
Visitors (#)	1,793,700	1,774,800	-1.1	182,600	186,100	+1.9
Room Nights	2,429,700	2,364,300	-2.7	229,400	232,700	+1.4
Direct Exp. (\$)	\$1,328,627,700	\$1,373,918,000	+3.4	\$115,244,300	\$120,853,300	+4.9
Total Eco. Impact (\$)	\$1,980,983,800	\$2,048,511,800	+3.4	\$171,829,300	\$180,192,300	+4.9

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

January Economic Impact



January

Lodging Statistics	2017	2018**	% Δ '17/'18
Occupancy	77.3%	83.4%	+7.9
Room Rates	\$230.9	\$248.3	+7.5
RevPAR	\$178.5	\$207.1	+16.0

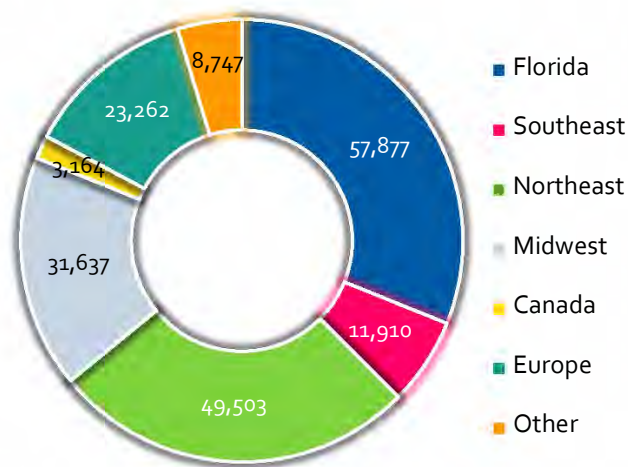
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January 2018 Visitor Origin Markets

Visitor Origins	2017		2018		% Δ '17/'18
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	29.9%	54,597	31.1%	57,877	+6.0
Southeast	5.6	10,226	6.4	11,910	+16.5
Northeast	27.3	49,850	26.6	49,503	-0.7
Midwest	17.6	32,138	17.0	31,637	-1.6
Canada	1.9	3,469	1.7	3,164	-8.8
Europe	13.4	24,468	12.5	23,262	-4.9
Other	4.3	7,852	4.7	8,747	+11.4
Total	100.0	182,600	100.0	186,100	+1.9

January 2018 Visitor Origins



Naples, Marco Island, Everglades Visitor Profile | January 2018

Transportation Mode (Multiple Response)	January 2017	January 2018	
Plane	64.4%	63.5%	↓
Rental Car	61.1	60.4	↓
Personal Car	35.4	36.2	↑

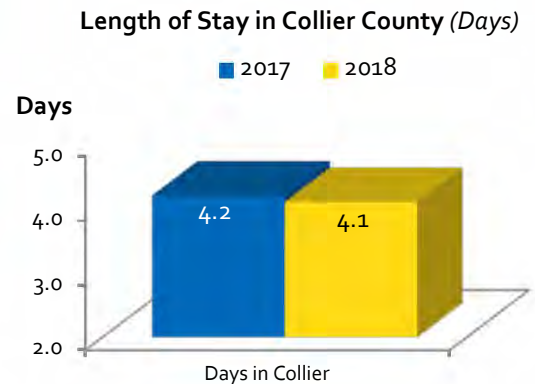
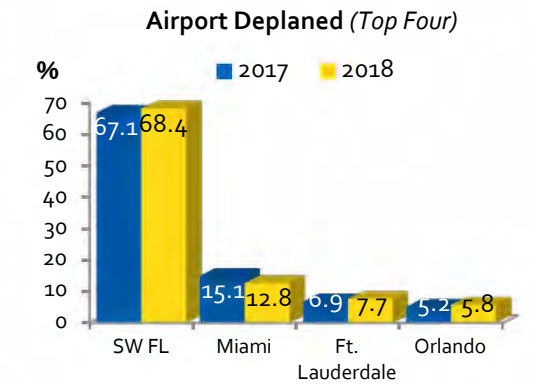
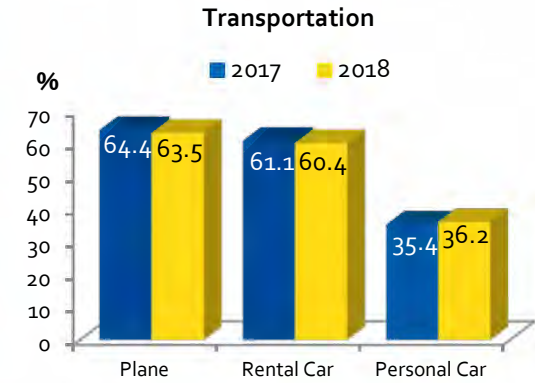
Airport Deplanned (Base: Flew)	January 2017	January 2018	
Southwest Florida International	67.1%	68.4%	↑
Miami International	15.1	12.8	↓
Ft. Lauderdale International	6.9	7.7	↑
Orlando International/Sanford	5.2	5.8	↑
Tampa International	3.7	4.7	↑

Purpose of Trip (Multiple Response)	January 2017	January 2018	
Vacation/Weekend Getaway	76.2%	74.3%	↓
Group Travel	35.5	37.4	↑
Visit with Friends and Relatives	13.8	12.5	↓
Special Event	8.0	9.1	↑

First Visit to (% yes)	January 2017	January 2018	
Collier County	41.1%	39.9%	↓
Florida	6.5	5.0	↓

Length of Stay (Days)	January 2017	January 2018	
In Collier County	4.2	4.1	↓

Party Size	January 2017	January 2018	
Number of People	2.3	2.4	↑



Naples, Marco Island, Everglades Visitor Profile | January 2018

Party Composition (Multiple Response)	January 2017	January 2018	
Couple	62.2%	61.6%	↓
Family	20.0	23.2	↑
Single	12.7	14.3	↑
Extended Family	5.6	4.4	↓
Group of Friends	3.3	1.7	↓

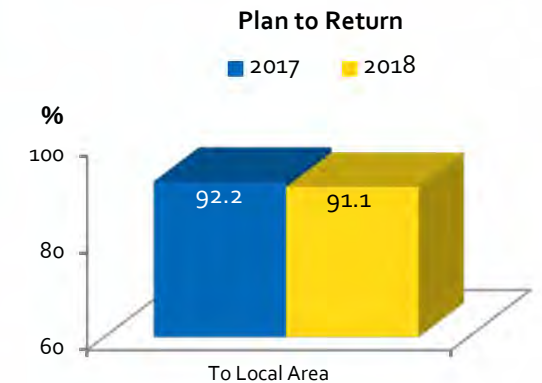
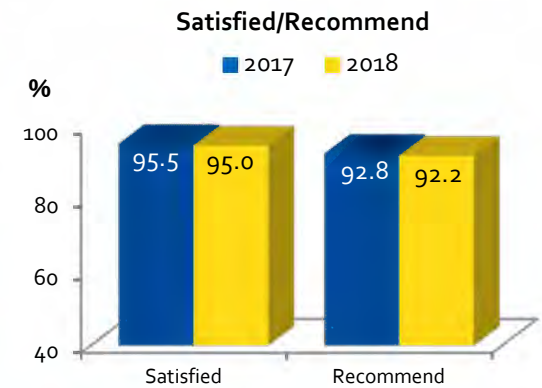
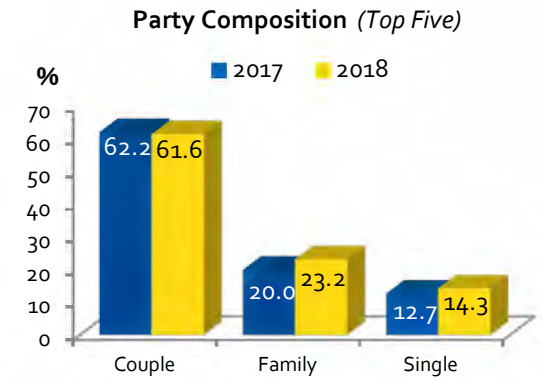
Did Party Have Lodging Reservations for Stay	January 2017	January 2018	
% Yes	92.8%	93.8%	↑

Expense Relative to Expectations	January 2017	January 2018	
More Expensive	21.0%	22.9%	↑
Less Expensive	1.4	1.3	↓
As Expected	69.8	66.5	↓

Satisfaction with Collier County	January 2017	January 2018	
Very Satisfied	93.1%	91.0%	↓
Satisfied	2.4	4.0	↑
Satisfaction Level (Combined)	95.5%	95.0%	↓

Recommend Collier to Friends/Relatives	January 2017	January 2018	
% Yes	92.8%	92.2%	↓

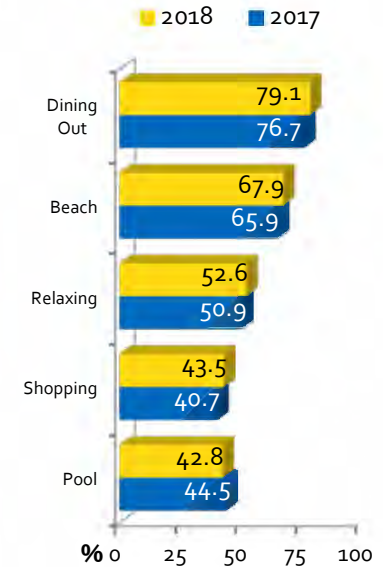
Plan to Return (% Yes)	January 2017	January 2018	
To Local Area	92.2%	91.1%	↓



Naples, Marco Island, Everglades Visitor Profile | January 2018

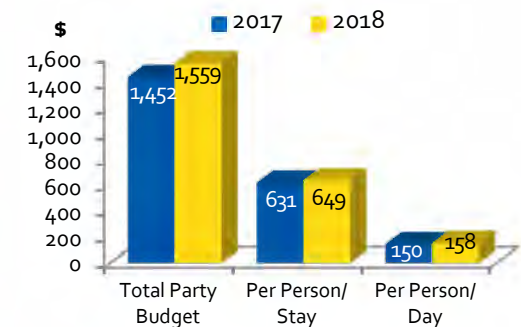
Activities Enjoyed in Area (Multiple Response)	January 2017	January 2018	
Dining Out	76.7%	79.1%	↑
Beach	65.9	67.9	↑
Relaxing	50.9	52.6	↑
Shopping	40.7	43.5	↑
Pool	44.5	42.8	↓
Sunsets	26.4	28.4	↑
Walking	22.6	26.0	↑
Reading	22.2	25.0	↑
Sunning	23.8	24.8	↑
Visiting with Friends/Relatives	24.4	23.3	↓
Sightseeing	19.7	22.3	↑
Enjoying Nature/Bird Watching/Everglades	25.8	21.0	↓
Art Galleries/Shows/Fairs	16.8	20.8	↑
Bars/Nightlife	15.6	17.4	↑
Museums	15.4	16.9	↑
Swimming	14.4	12.5	↓
Golfing	11.0	10.7	↓

Activities Enjoyed in Area (Top Five)



Demographics	January 2017	January 2018	
Average Age Head of Household (Years)	51.4	51.8	↑
Median Annual Household Income	\$153,915	\$154,514	↑

Collier Base Budgets

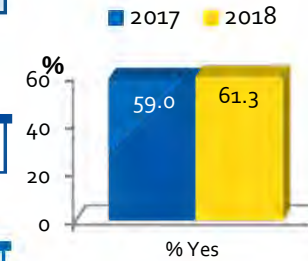


Collier Base Budget	January 2017	January 2018	
Total	\$1,451.59	\$1,558.56	↑
Per Person/Stay	631.13	649.40	↑
Per Person/Day	150.27	158.39	↑

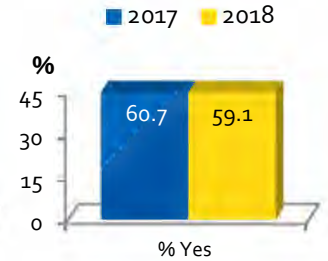
Naples, Marco Island, Everglades Visitor Profile | January 2018

Area Information Seen/Read/Heard	January 2017	January 2018	
% Yes	59.0%	61.3%	↑
Directly Influenced by Information (Base: Seen/Read/Heard Area Information)			
	January 2017	January 2018	
% Yes	60.7%	59.1%	↓
Why Chose the Area (Multiple Response)			
	January 2017	January 2018	
Beach Area	56.0%	53.7%	↓
Weather	54.3	50.5	↓
Quiet/Peaceful/Laid Back	36.7	36.2	↓
Business/Meeting/Conference	33.4	35.6	↑
Relaxing	32.2	35.0	↑
Previous Experience	31.6	33.6	↑
Outdoor Recreation/Nature	32.2	30.9	↓
Never Been	30.1	27.4	↓
Restaurants	25.2	26.4	↑
Appealing Brochures/Websites	24.4	25.4	↑
Not Crowded	28.1	24.1	↓
Recommendation	24.7	22.6	↓
Quality of Accommodations	22.8	20.9	↓
Internet Use			
	January 2017	January 2018	
Use Internet to Obtain Travel Info for This Trip (% Yes)	93.5%	92.9%	↓
Book Reservations for Trip Online (%Yes)	76.0	79.1	↑

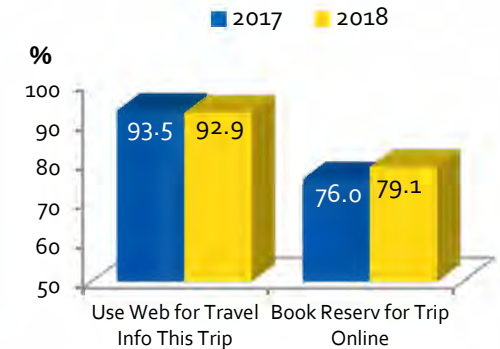
Seen/Read/Heard



Info. Influenced



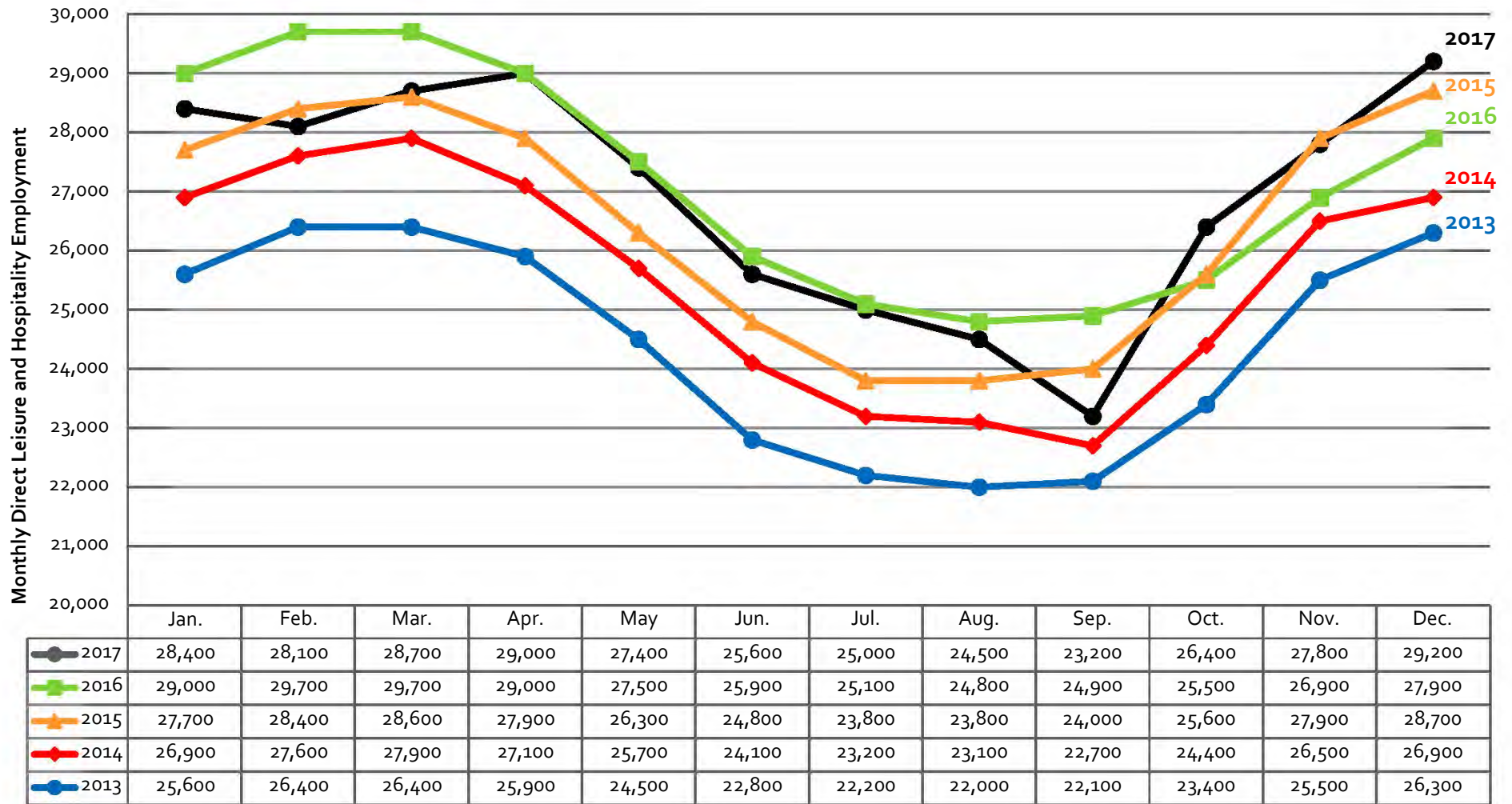
Internet Use



Industry Data: *2012-2018*

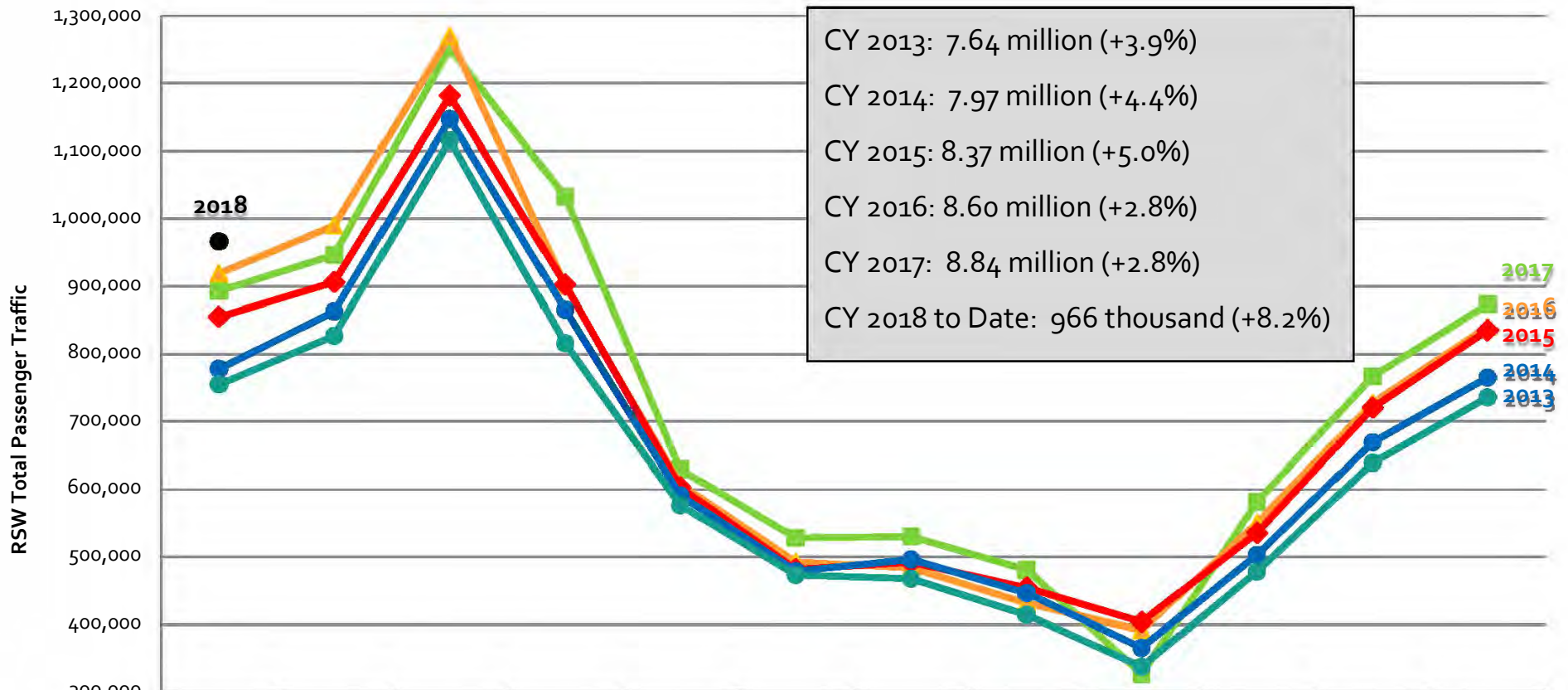


Collier Direct Leisure and Hospitality Employment (Calendar Year) *



* 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											
■ 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
● 2013	755,232	827,147	1,115,937	815,978	576,713	473,208	467,946	414,303	338,175	478,376	639,047	735,739