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Naples, Marco Island, Everglades Convention and Visitors Bureau July 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.

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August 2017

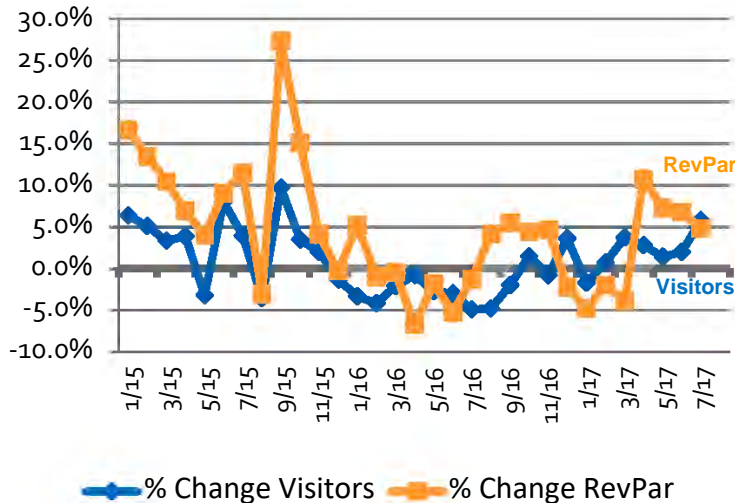
Naples, Marco Island, Everglades: July 2017 Summary

Executive Summary: July 2017

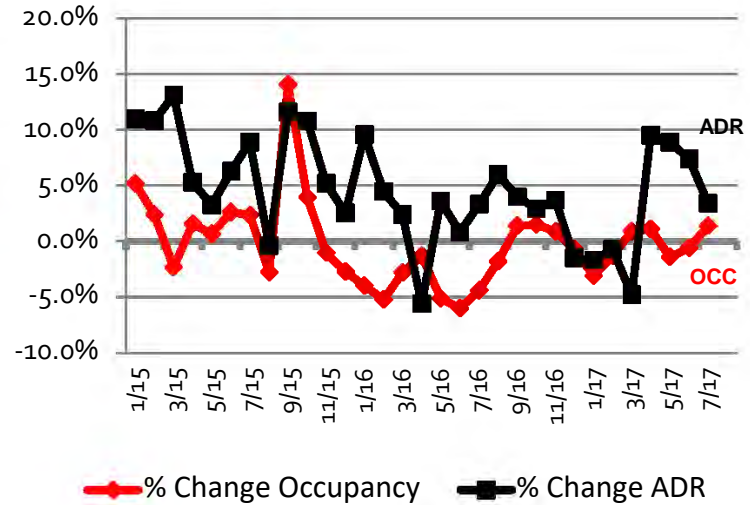
- This July, some **135,200** visitors stayed in Collier's commercial lodgings (+5.8%). Their visits contributed an estimated **\$129,499,000** of economic impact to the County (+9.9%). Key performance metrics are as follows:

	<u>July</u>	<u>2016</u>	<u>2017</u>	<u>% Δ</u>
Occupancy		71.6%	72.6%	+1.4%
ADR		\$149.1	\$154.1	+3.4%
RevPAR		\$106.8	\$111.9	+4.8%

Key Collier Visitation Metrics (%Δ)



Key Collier Visitation Metrics (%Δ)



- Compared to last July, eight out of ten (82.6%) lodging managers report their three month forward reservations levels as "up" or the "same."

% of Properties (July)

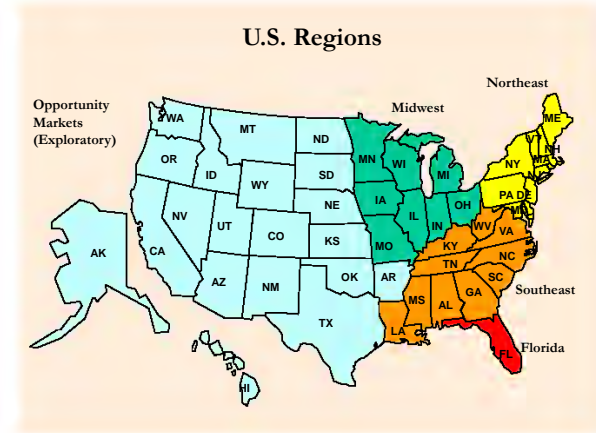
Reporting Reservations:

	<u>2016</u>	<u>2017</u>
Up	44.3%	31.9%
Same	29.8	50.7
Down	23.2	17.4

Naples, Marco Island, Everglades: July 2017 Summary

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

<u>July Visitation</u>	<u>2017 Visitor #</u>	<u>Δ</u>
Florida	70,980	+4.4%
Southeast	7,706	+0.5
Northeast	13,790	+3.8
Midwest	8,788	+2.6
Canada	1,352	-11.8
Europe	23,931	+11.5
West	8,653	+18.8
Total	135,200	+5.8%



4. This July, nearly half of the destination's patrons flew (**2016: 45.9%; 2017: 47.7%**). A majority of these (**54.2%**) deplaned at RSW, with Miami capturing some **25.4%** of deplanements.
5. The typical July visitor party includes an average of **3.1** travelers who stay for **3.2** nights in the Naples, Marco Island, Everglades area.
6. Some **45.6%** of Collier's July visitors are in the destination for the first time (**2016: 43.4%**).
7. Fully **98.6%** consult the web for trip information, with some **83.9%** making bookings for their trip online.
8. The vast majority (**95.9%**) are satisfied with their Collier stay, with **88.7%** planning a future trip to the area.
9. This year, July visitors average **45.0** years of age (**2016: 46.2 years of age**).

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

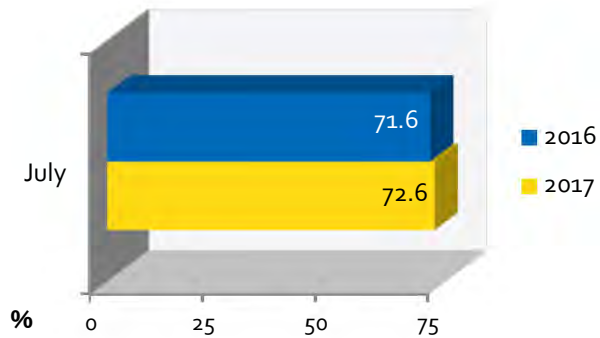


Naples, Marco Island, Everglades Visitor Profile | July 2017

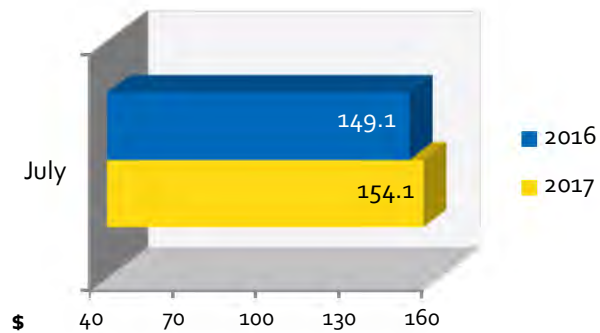
H/M/C* Visitor Statistics	Year to Date (January – July)			July		
	2016	2017	% Δ '16/'17	2016	2017	% Δ '16/'17
Visitors (#)	1,145,200	1,167,700	+2.0	127,800	135,200	+5.8
Room Nights	1,540,100	1,529,700	-0.7	184,200	189,100	+2.7
Direct Exp. (\$)	\$911,127,600	\$954,337,100	+4.7	\$79,014,900	\$86,853,800	+9.9
Total Eco. Impact (\$)	\$1,358,491,300	\$1,422,916,600	+4.7	\$117,811,200	\$129,499,000	+9.9

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

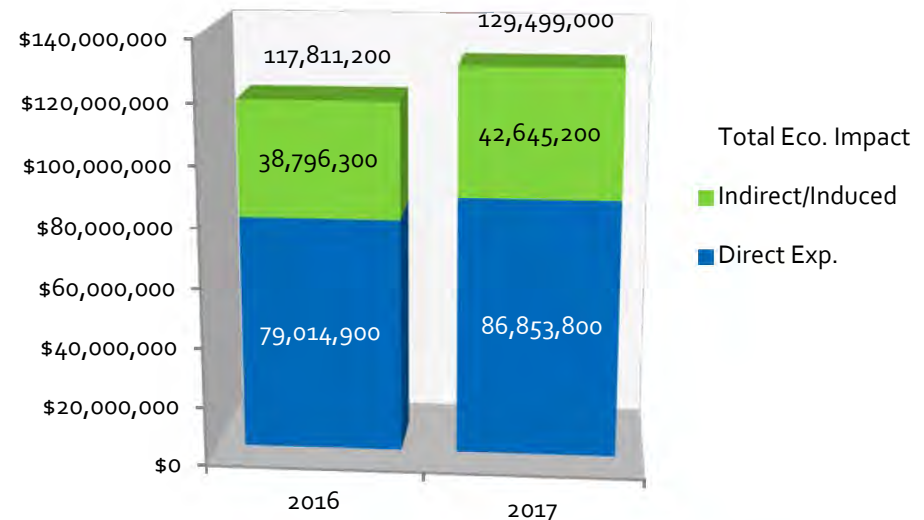
July Occupancy



July Room Rates



July Economic Impact



July

Lodging Statistics

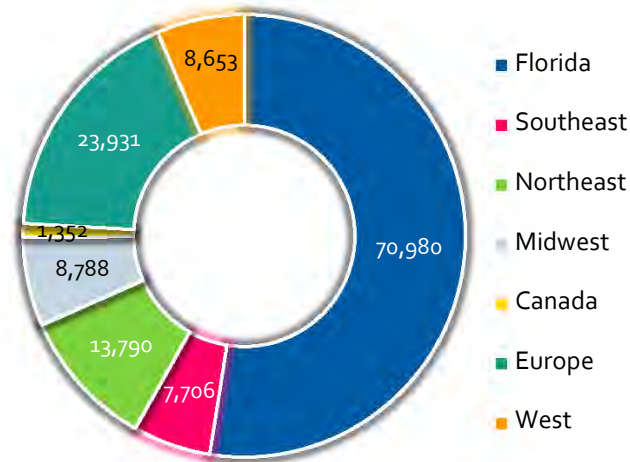
	2016	2017**	% Δ '16/'17
Occupancy	71.6%	72.6%	+1.4
Room Rates	\$149.1	\$154.1	+3.4
RevPAR	\$106.8	\$111.9	+4.8

** Note: 387 prime lodging units were closed for renovations

July 2017 Visitor Origin Markets

Visitor Origins	2016		2017		% Δ '16/'17
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	53.2%	67,990	52.5%	70,980	+4.4
Southeast	6.0	7,668	5.7	7,706	+0.5
Northeast	10.4	13,291	10.2	13,790	+3.8
Midwest	6.7	8,563	6.5	8,788	+2.6
Canada	1.2	1,533	1.0	1,352	-11.8
Europe	16.8	21,470	17.7	23,931	+11.5
West	5.7	7,285	6.4	8,653	+18.8
Total	100.0	127,800	100.0	135,200	+5.8

July 2017 Visitor Origins



Naples, Marco Island, Everglades Visitor Profile | July 2017

Transportation Mode (Multiple Response)	July 2016	July 2017
Personal Car	52.0%	50.5%
Plane	45.9	47.7
Rental Car	41.8	44.7

Airport Deplaned (Base: Flew)	July 2016	July 2017
Southwest Florida International	53.5%	54.2%
Miami International	27.6	25.4
Orlando International/Sanford	7.7	8.2
Ft. Lauderdale International	7.2	7.7
Tampa International	2.6	3.1

Purpose of Trip (Multiple Response)	July 2016	July 2017
Vacation/Weekend Getaway	87.2%	85.6%
Group Travel	17.0	19.8
Visit with Friends and Relatives	10.5	10.0
Special Event	5.6	4.9

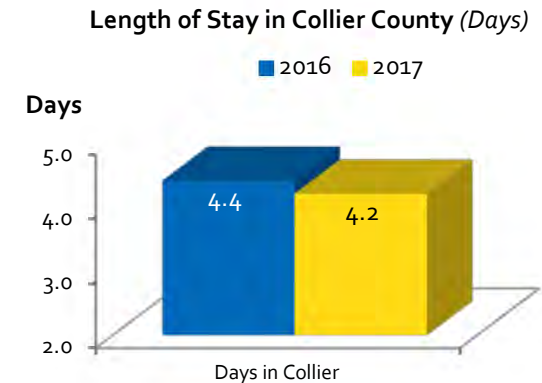
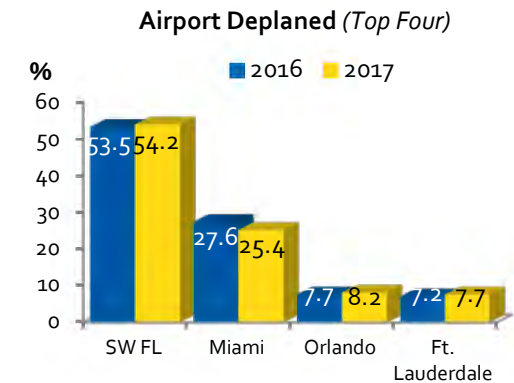
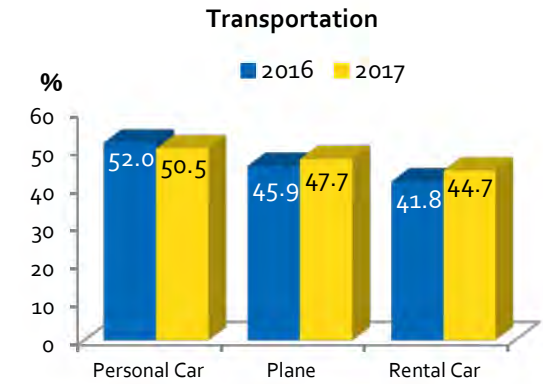
First Visit to (% yes)	July 2016	July 2017
Collier County	43.4%	45.6%
Florida	8.5	9.6

Length of Stay (Days)	July 2016	July 2017
In Collier County	4.4	4.2

Party Size	July 2016	July 2017
Number of People	3.0	3.1

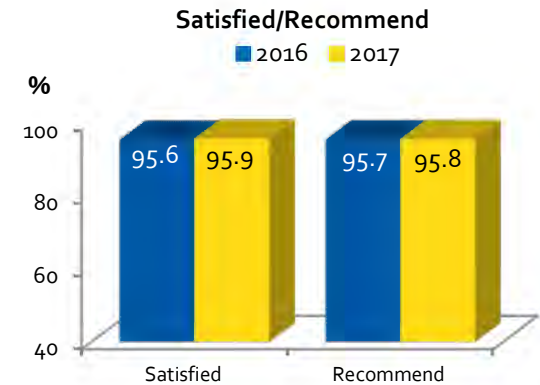
Party Composition (Multiple Response)	July 2016	July 2017
Family	44.1%	47.4%
Couple	42.4	39.8
Single	6.7	8.9
Group of Friends	4.3	5.1

Did Party Have Lodging Reservations for Stay	July 2016	July 2017
% Yes	92.4%	94.5%



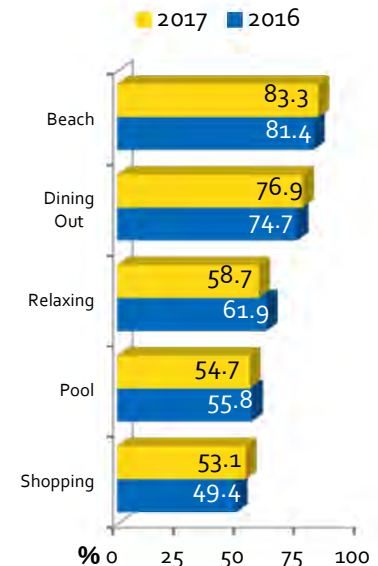
Naples, Marco Island, Everglades Visitor Profile | July 2017

Satisfaction with Collier County	July 2016	July 2017
Very Satisfied	88.4%	85.6%
Satisfied	7.2	10.3
Satisfaction Level (Combined)	95.6%	95.9%



Activities Enjoyed in Area (Multiple Response)	July 2016	July 2017
Beach	81.4%	83.3%
Dining Out	74.7	76.9
Relaxing	61.9	58.7
Pool	55.8	54.7
Shopping	49.4	53.1
Sightseeing	34.5	37.1
Swimming	38.3	36.5
Enjoying Nature/Bird Watching/Everglades	37.6	36.3
Sunsets	31.7	33.1
Sunning	25.4	28.3
Walking	22.8	24.7
Bars/Nightlife	19.1	23.1
Shelling	14.4	17.5
Reading	20.1	17.1
Fishing	12.0	14.3
Art Galleries/Shows/Fairs	11.0	13.3
Visiting with Friends/Relatives	12.2	10.7
Boating	8.8	9.3
Golfing	7.9	8.7

Activities Enjoyed in Area (Top Five)

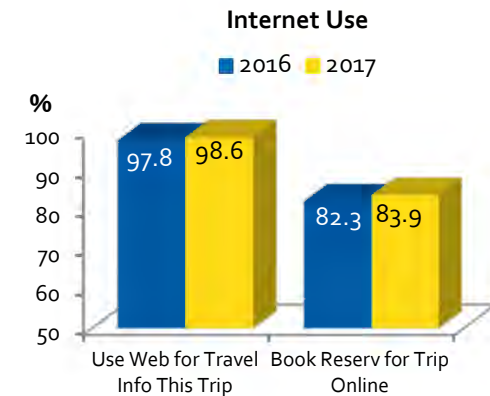
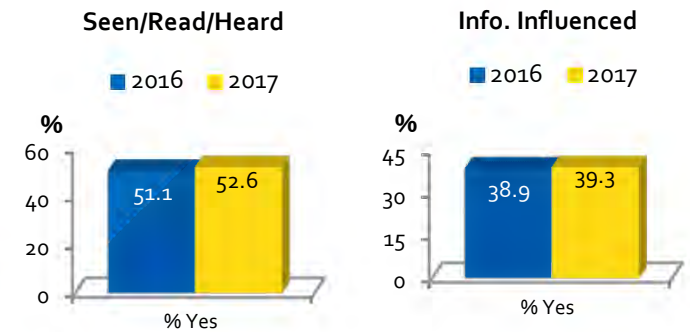


Expense Relative to Expectations	July 2016	July 2017
More Expensive	13.1%	18.5%
Less Expensive	5.9	3.3
As Expected	78.2	73.9

Demographics	July 2016	July 2017
Average Age Head of Household (Years)	46.2	45.0
Median Annual Household Income	\$137,649	\$139,893

Naples, Marco Island, Everglades Visitor Profile | July 2017

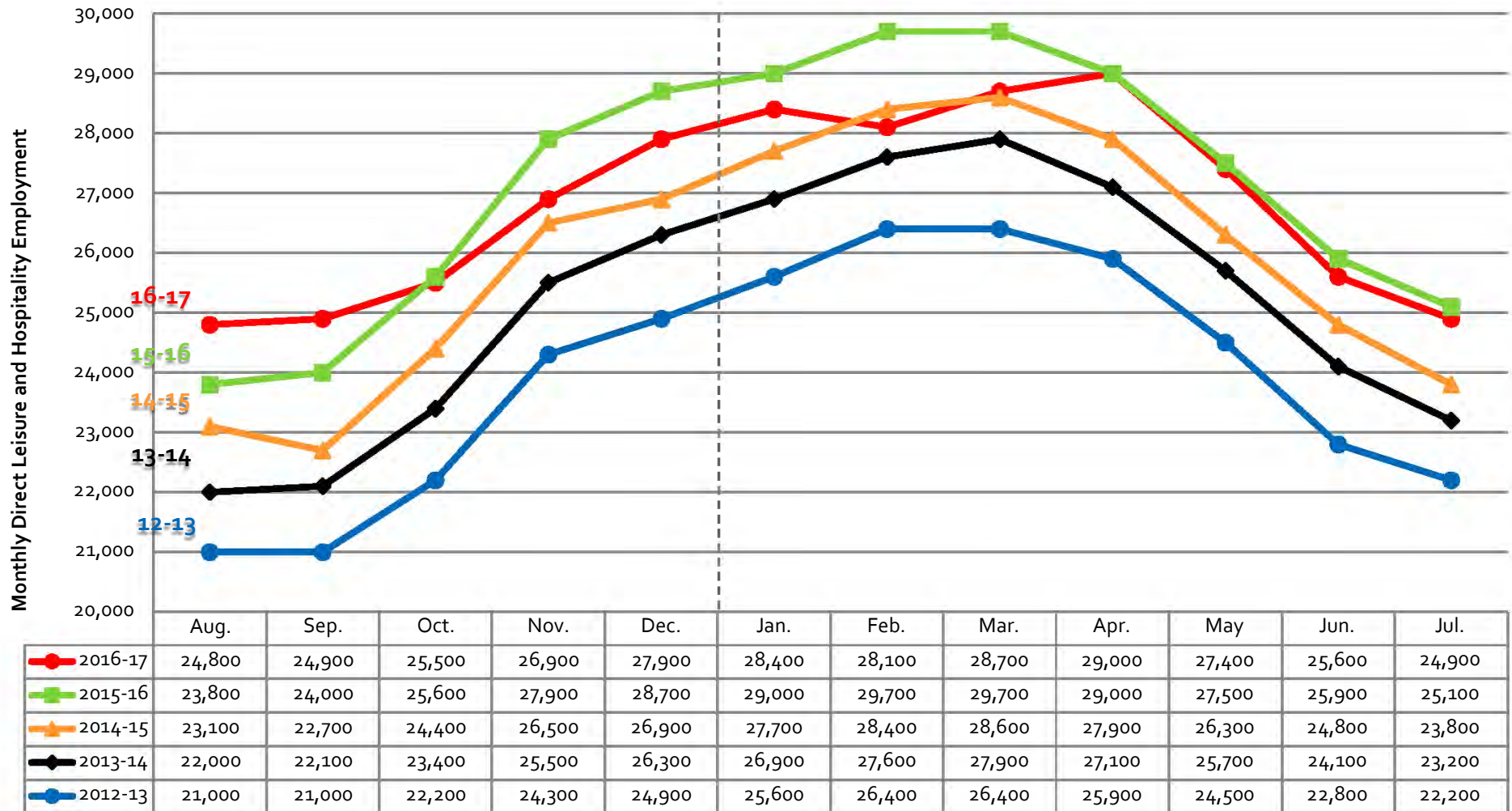
Recommend Collier to Friends/Relatives		
	July 2016	July 2017
% Yes	95.7%	95.8%
Plan to Return (% Yes)		
	July 2016	July 2017
To Local Area	90.0%	88.7%
Collier Base Budget		
	July 2016	July 2017
Total	\$1,854.81	\$1,991.48
Per Person/Stay	618.27	642.41
Per Person/Day	140.52	152.96
Area Information Seen/Read/Heard		
	July 2016	July 2017
% Yes	51.1%	52.6%
Directly Influenced by Information (Base: Seen/Read/Heard Area Information)		
	July 2016	July 2017
% Yes	38.9%	39.3%
Why Chose the Area (Multiple Response)		
	July 2016	July 2017
Beach Area	59.3%	60.0%
Relaxing	41.9	42.4
Quiet/Peaceful/Laid Back	37.7	41.7
Quality of Accommodations	40.9	39.6
Restaurants	32.6	36.7
Not Crowded	33.0	34.7
Previous Experience	32.9	31.7
Appealing Brochures/Websites	30.2	31.0
Recommendation	26.9	27.6
Never Been	25.5	26.2
Weather	27.9	23.7
Outdoor Recreation/Nature	29.1	23.3
Business/Meeting/Conference	16.6	19.3
Internet Use		
	July 2016	July 2017
Use Internet to Obtain Travel Info for This Trip (% Yes)	97.8%	98.6%
Book Reservations for Trip Online (%Yes)	82.3	83.9



Industry Data: *2012-2017*

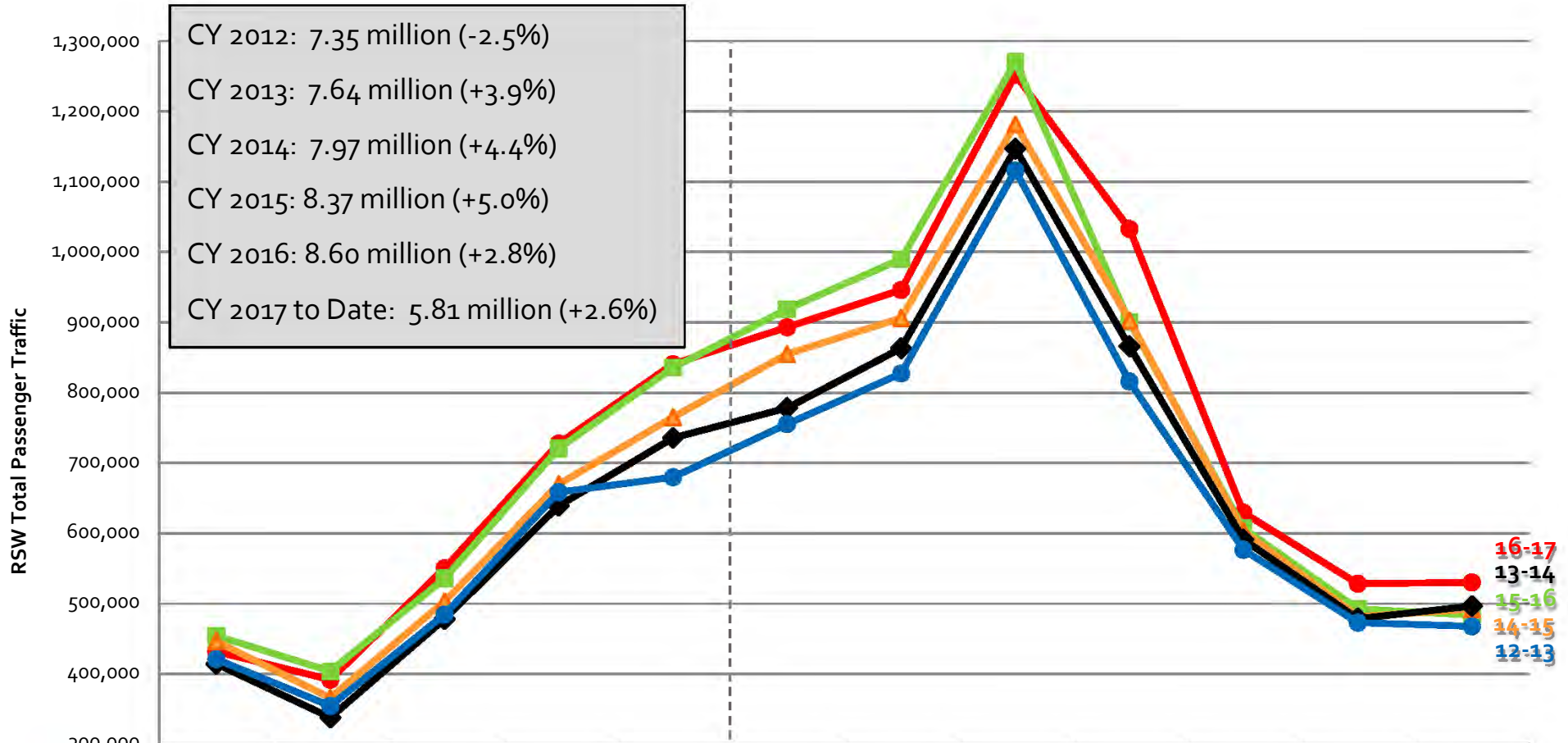


Collier Direct Leisure and Hospitality Employment (Calendar Year) *



* Source: Florida Department of Economic Opportunity/U.S. Department of Labor.

Southwest Florida International Airport (RSW) Passenger Traffic



	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.
2016-17	431,729	391,844	550,316	727,634	840,501	892,905	946,079	1,252,124	1,032,783	629,321	528,383	530,428
2015-16	454,360	404,045	535,921	720,556	835,359	918,929	989,845	1,269,961	900,594	606,833	492,413	484,074
2014-15	446,402	366,038	503,243	669,567	765,288	854,953	906,039	1,181,382	902,669	602,891	481,512	492,114
2013-14	414,303	338,175	478,376	639,047	735,739	778,163	862,899	1,147,059	865,554	591,116	478,692	496,472
2012-13	421,211	354,640	484,768	658,629	679,672	755,232	827,147	1,115,937	815,978	576,713	473,208	467,946