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Naples, Marco Island, Everglades Convention and Visitors Bureau July 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

August 2018

Naples, Marco Island, Everglades: July 2018 Summary

Executive Summary: July 2018

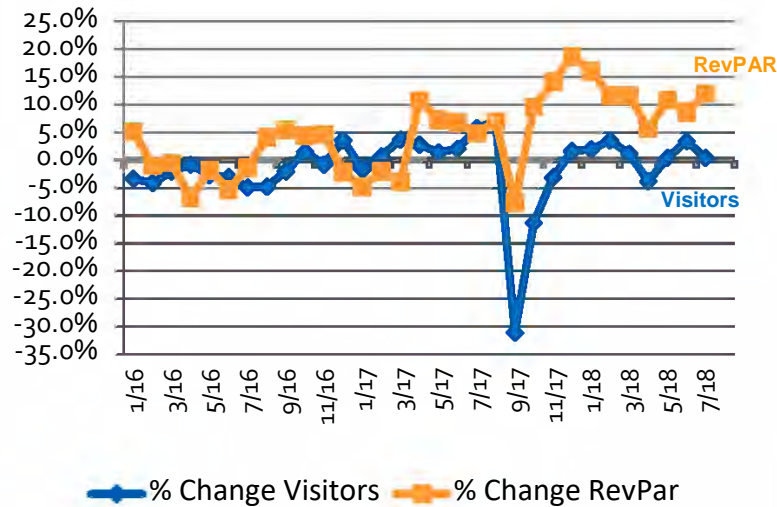
1. This July, some **135,700** visitors stayed in Collier's commercial lodgings **(+0.4%)***. Their visits contributed an estimated **\$135,981,100** of economic impact to the County **(+5.0%)**. Key performance metrics are as follows:

<u>July</u>	<u>2017</u>	<u>2018**</u>	<u>% Δ</u>
Occupancy	72.6%	76.2%	+5.0%
ADR	\$154.1	\$164.4	+6.7%
RevPAR	\$111.9	\$125.3	+12.0%

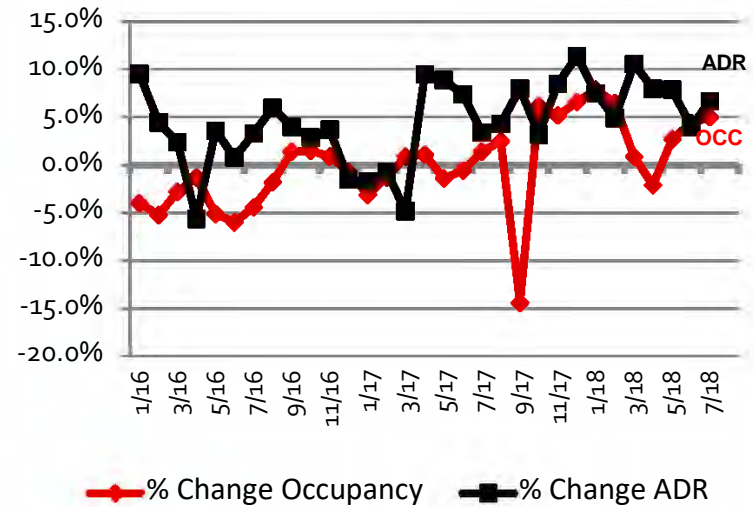
* As of July 2018, approximately 1,058 lodging units were closed for restorations.

** Based on units available to be rented.

Key Collier Visitation Metrics (%Δ)



Key Collier Visitation Metrics (%Δ)



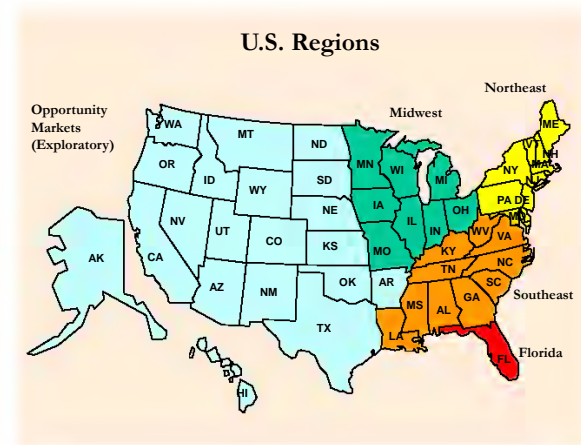
Naples, Marco Island, Everglades: July 2018 Summary

2. Compared to last July, half (**50.0%**) of Collier lodging managers report their three month forward reservations levels as “up.”

% of Properties (July)			
<u>Reporting Reservations:</u>			
	<u>2017</u>	<u>2018</u>	
Up	31.9%	50.0%	
Same	50.7	30.8	
Down	17.4	19.2	

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

<u>July Visitation</u>	<u>2018</u>	
	<u>Visitor #</u>	<u>Δ</u>
Florida	69,614	-1.9%
Southeast	8,006	+3.9
Northeast	16,420	+19.1
Midwest	9,906	+12.7
Canada	1,221	-9.7
Europe	22,662	-5.3
Other	7,871	-9.0
Total	135,700	+0.4%



4. This July, nearly half of the destination’s visitor parties flew (**2017: 47.7%; 2018: 48.7%**). A majority of these (**55.9%**) deplaned at RSW, with Miami capturing some **24.1%** of deplanements.
5. This July, visitor party size averaged **3.0** travelers who stayed for **3.1 nights** in the Naples, Marco Island, Everglades area (**2017: 3.1 people; 3.2 nights**).

Naples, Marco Island, Everglades: July 2018 Summary

6. Some **43.0%** of Collier's July visitors are in the destination for the first time.
7. Fully **97.4%** consult the web for trip information, with some **86.6%** making bookings for their trip online.
8. The vast majority (**94.9%**) are satisfied with their Collier stay, with **89.7%** planning a future trip to the area.
9. The typical July visitor is **44.3 years of age (2017: 45.0 years)**.

Naples, Marco Island, Everglades:

July 2018 Visitor Profile

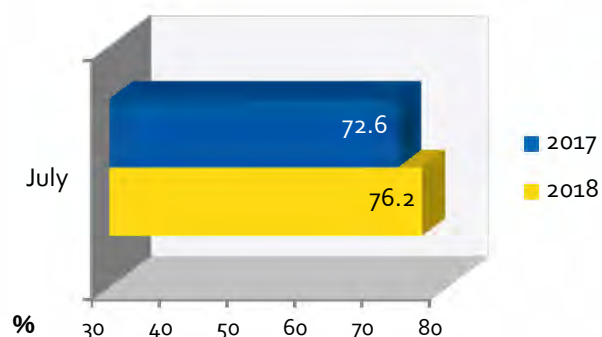


Naples, Marco Island, Everglades Visitor Profile July 2018

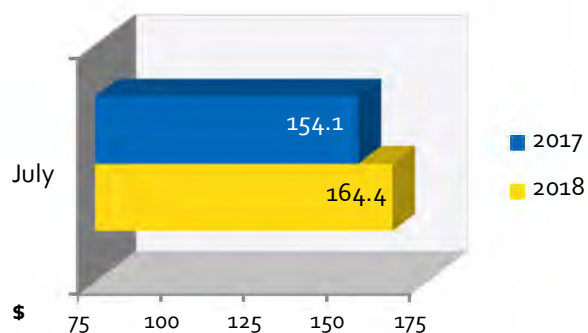
H/M/C+ Visitor Statistics	Year to Date (January – July)		% Δ '17/'18	July		% Δ '17/'18
	2017	2018		2017	2018*	
Visitors (#)	1,167,700	1,181,200	+1.2	135,200	135,700	+0.4
Room Nights	1,529,700	1,516,500	-0.9	189,100	187,700	-0.7
Direct Exp. (\$)	\$954,337,100	\$994,890,800	+4.2	\$86,853,800	\$91,201,300	+5.0
Total Eco. Impact (\$)	\$1,422,916,600	\$1,483,382,200	+4.2	\$129,499,000	\$135,981,100	+5.0

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

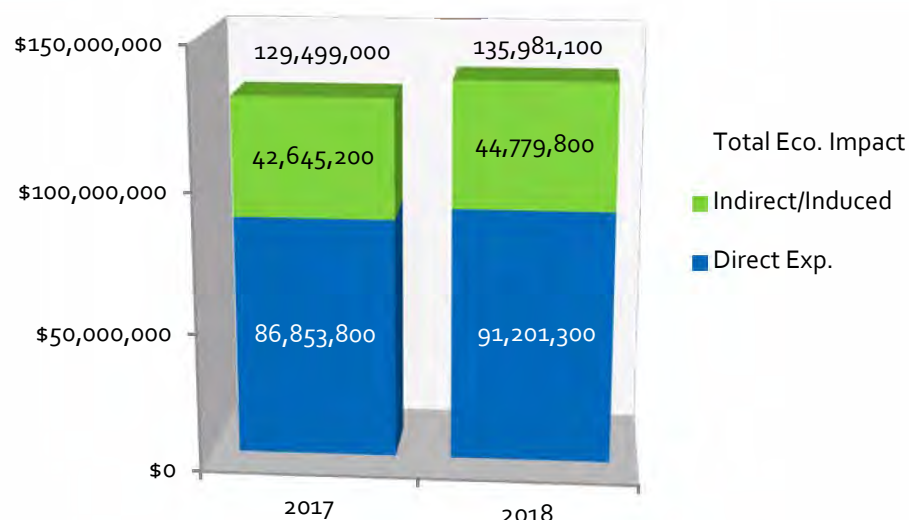
July Occupancy



July Room Rates



July Economic Impact



July

Lodging Statistics

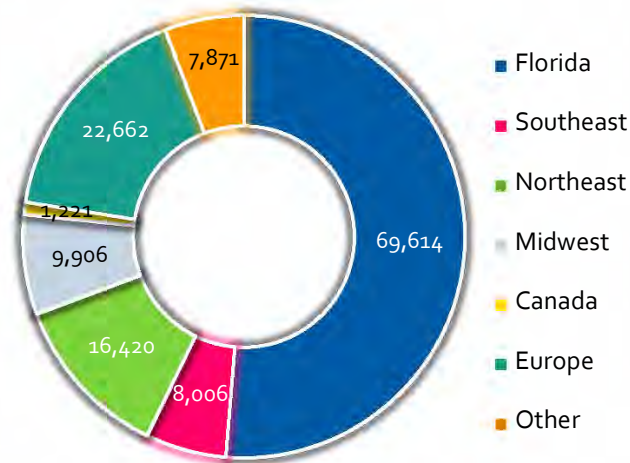
	2017	2018**	% Δ '17/'18
Occupancy	72.6%	76.2%	+5.0
Room Rates	\$154.1	\$164.4	+6.7
RevPAR	\$111.9	\$125.3	+12.0

** Note: As of July 2018, approximately 1,058 Collier lodging units were closed for renovations

July 2018 Visitor Origin Markets

Visitor Origins	2017		2018		% Δ '17/'18
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	52.5%	70,980	51.3%	69,614	-1.9
Southeast	5.7	7,706	5.9	8,006	+3.9
Northeast	10.2	13,790	12.1	16,420	+19.1
Midwest	6.5	8,788	7.3	9,906	+12.7
Canada	1.0	1,352	0.9	1,221	-9.7
Europe	17.7	23,931	16.7	22,662	-5.3
Other	6.4	8,653	5.8	7,871	-9.0
Total	100.0	135,200	100.0	135,700	+0.4

July 2018 Visitor Origins



Naples, Marco Island, Everglades Visitor Profile | July 2018

Transportation Mode (Multiple Response)	July 2017	July 2018	
Personal Car	50.5%	50.0%	↓
Plane	47.7	48.7	↑
Rental Car	44.7	45.2	↑

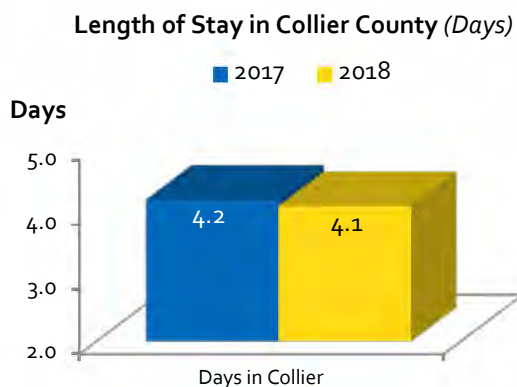
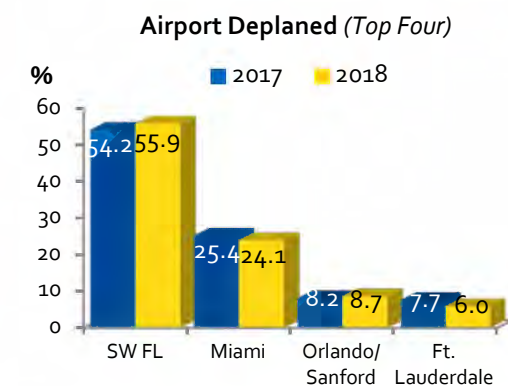
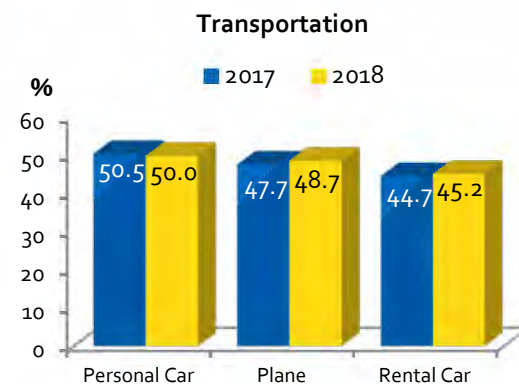
Airport Deplaned (Base: Flew)	July 2017	July 2018	
Southwest Florida International	54.2%	55.9%	↑
Miami International	25.4	24.1	↓
Orlando International/Sanford	8.2	8.7	↑
Ft. Lauderdale International	7.7	6.0	↓
Tampa International	3.1	4.0	↑

Purpose of Trip (Multiple Response)	July 2017	July 2018	
Vacation/Weekend Getaway	85.6%	85.3%	↓
Group Travel	19.8	22.9	↑
Visit with Friends and Relatives	10.0	11.4	↑
Special Event	4.9	3.4	↓

First Visit to (% yes)	July 2017	July 2018	
Collier County	45.6%	43.0%	↓
Florida	9.6	7.4	↓

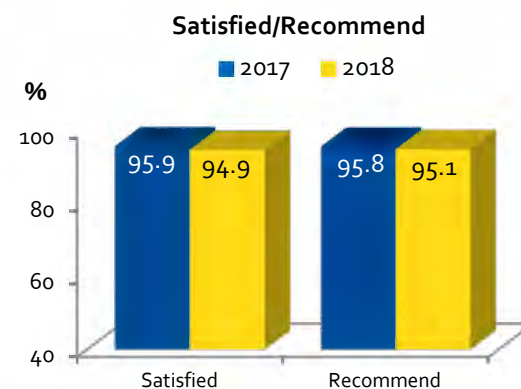
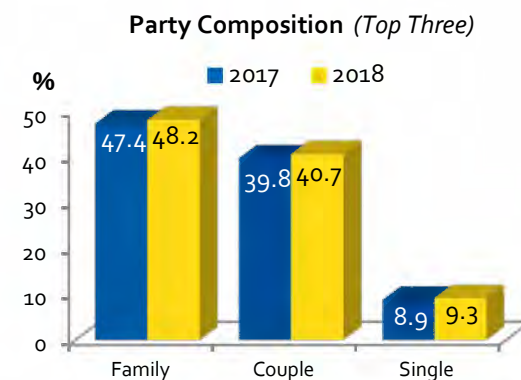
Length of Stay (Days)	July 2017	July 2018	
In Collier County	4.2	4.1	↓

Party Size	July 2017	July 2018	
Number of People	3.1	3.0	↓



Naples, Marco Island, Everglades Visitor Profile | July 2018

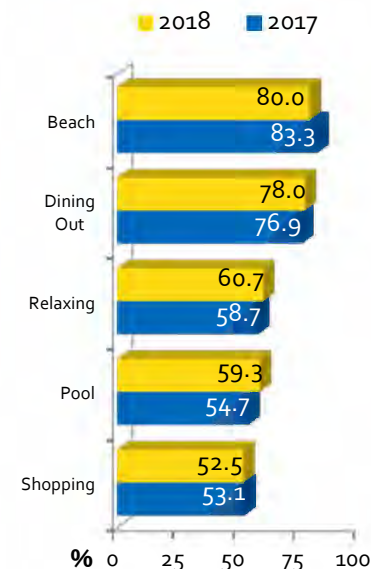
Party Composition (Multiple Response)		July 2017	July 2018	
Family		47.4%	48.2%	↑
Couple		39.8	40.7	↑
Single		8.9	9.3	↑
Group of Friends		5.1	3.7	↓
Did Party Have Lodging Reservations for Stay		July 2017	July 2018	
% Yes		94.5%	95.6%	↑
Expense Relative to Expectations		July 2017	July 2018	
More Expensive		18.5%	17.8%	↓
Less Expensive		3.3	3.6	↑
As Expected		73.9	74.6	↑
Satisfaction with Collier County		July 2017	July 2018	
Very Satisfied		85.6%	86.5%	↑
Satisfied		10.3	8.4	↓
Satisfaction Level (Combined)		95.9%	94.9%	↓
Recommend Collier to Friends/Relatives		July 2017	July 2018	
% Yes		95.8%	95.1%	↓
Plan to Return (% Yes)		July 2017	July 2018	
To Local Area		88.7%	89.7%	↑



Naples, Marco Island, Everglades Visitor Profile | July 2018

Activities Enjoyed in Area (Multiple Response)	July 2017	July 2018	
Beach	83.3%	80.0%	↓
Dining Out	76.9	78.0	↑
Relaxing	58.7	60.7	↑
Pool	54.7	59.3	↑
Shopping	53.1	52.5	↓
Sightseeing	37.1	36.4	↓
Sunsets	33.1	35.6	↑
Swimming	36.5	34.6	↓
Sunning	28.3	30.7	↑
Enjoying Nature/Bird Watching/Everglades	36.3	26.9	↓
Bars/Nightlife	23.1	23.4	↑
Walking	24.7	21.5	↓
Reading	17.1	20.6	↑
Shelling	17.5	16.3	↓
Visiting with Friends/Relatives	10.7	13.6	↑
Art Galleries/Shows/Fairs	13.3	11.9	↓
Fishing	14.3	10.2	↓
Golfing	8.7	7.4	↓

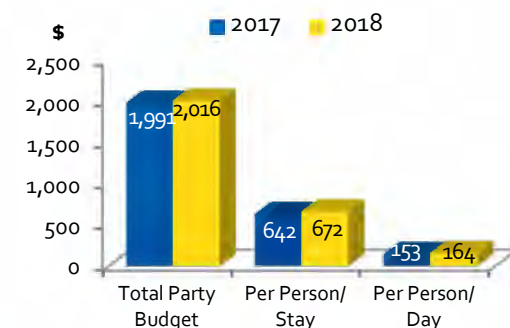
Activities Enjoyed in Area (Top Five)



Demographics	July 2017	July 2018	
Average Age Head of Household (Years)	45.0	44.3	↓
Median Annual Household Income	\$139,893	\$141,802	↑

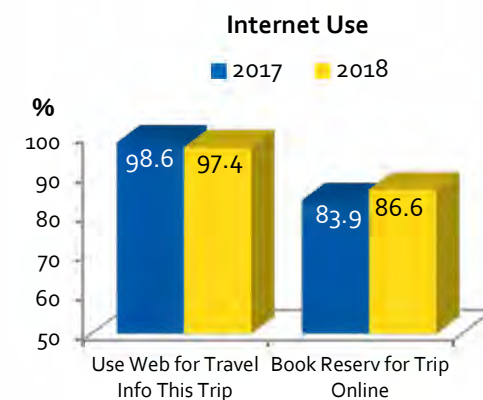
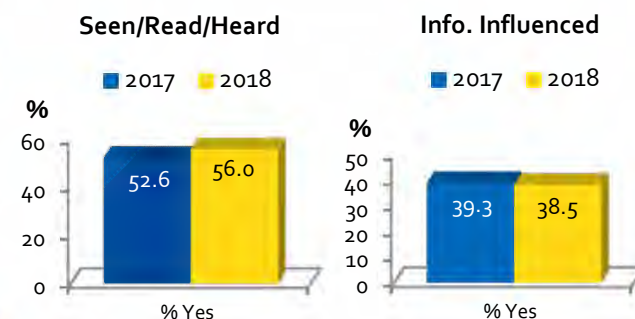
Collier Base Budget	July 2017	July 2018	
Total	\$1,991.48	\$2,016.25	↑
Per Person/Stay	642.41	672.08	↑
Per Person/Day	152.96	163.92	↑

Collier Base Budgets



Naples, Marco Island, Everglades Visitor Profile | July 2018

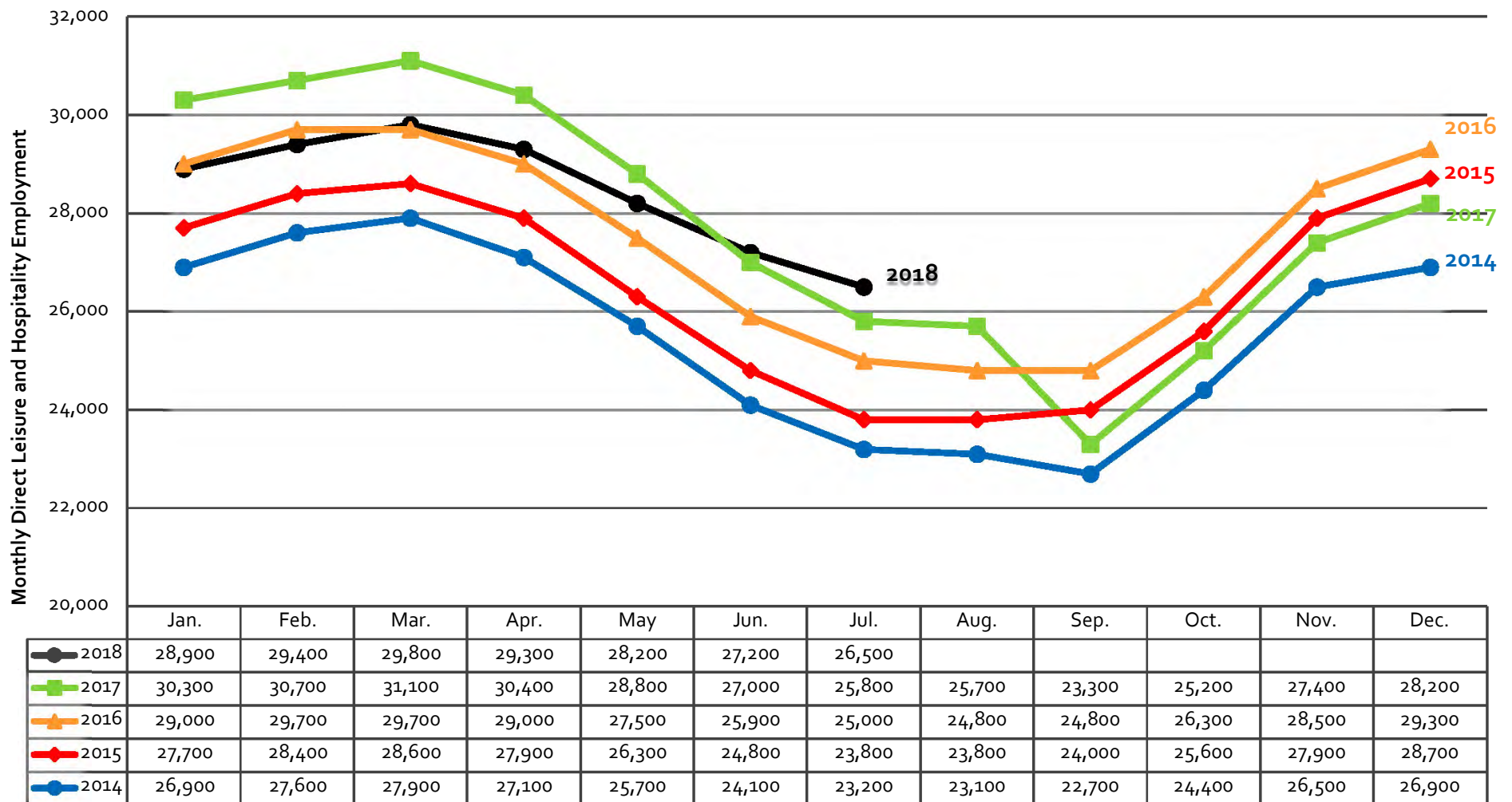
Area Information Seen/Read/Heard	July 2017	July 2018	
% Yes	52.6%	56.0%	↑
Directly Influenced by Information (Base: Seen/Read/Heard Area Information)			
	July 2017	July 2018	
% Yes	39.3%	38.5%	↓
Why Chose the Area (Multiple Response)			
	July 2017	July 2018	
Beach Area	60.0%	60.3%	↑
Relaxing	42.4	44.7	↑
Quiet/Peaceful/Laid Back	41.7	43.1	↑
Quality of Accommodations	39.6	41.4	↑
Restaurants	36.7	37.9	↑
Appealing Brochures/Websites	31.0	34.1	↑
Not Crowded	34.7	32.6	↓
Previous Experience	31.7	32.3	↑
Weather	23.7	28.7	↑
Recommendation	27.6	25.2	↓
Never Been	26.2	23.0	↓
Business/Meeting/Conference	19.3	22.0	↑
Outdoor Recreation/Nature	23.3	20.7	↓
Internet Use			
	July 2017	July 2018	
Use Internet to Obtain Travel Info for This Trip (% Yes)	98.6%	97.4%	↓
Book Reservations for Trip Online (%Yes)	83.9	86.6	↑



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

