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Naples, Marco Island, Everglades Convention and Visitors Bureau March 2017 Visitor Profile

Prepared for:

Collier County Board of County Commissioners
and

Naples, Marco Island, Everglades Convention and Visitors Bureau

Prepared by:

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April 2017

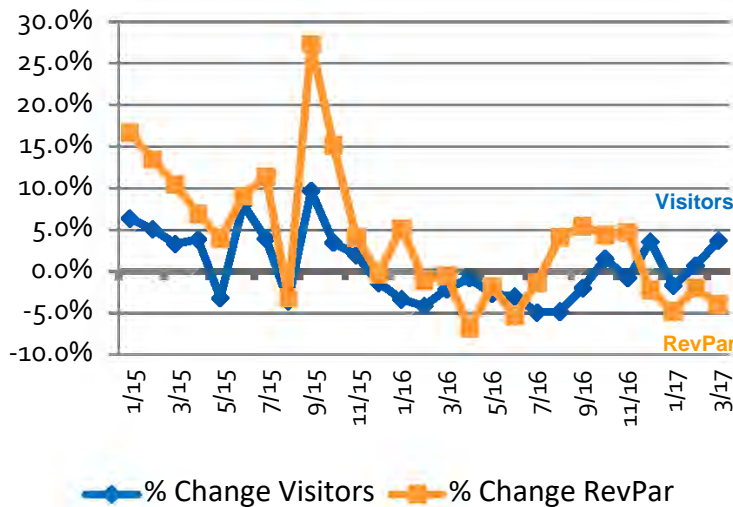
Naples, Marco Island, Everglades: March 2017 Summary

Executive Summary: March 2017

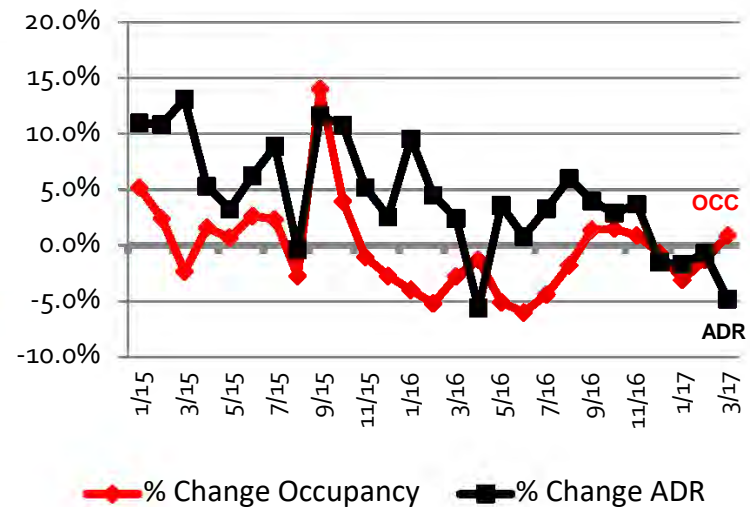
- This March, some **230,700** visitors stayed in Collier's commercial lodgings (**+3.7%**). Their visits contributed an estimated **\$333,379,300** of economic impact to the County (**+6.4%**). Key performance metrics are as follows:

<u>March</u>	<u>2016</u>	<u>2017</u>	<u>% Δ</u>
Occupancy	89.5%	90.3%	+0.9%
ADR	\$353.2	\$336.4	-4.8%
RevPAR	\$316.1	\$303.8	-3.9%

Key Collier Visitation Metrics (%Δ)



Key Collier Visitation Metrics (%Δ)



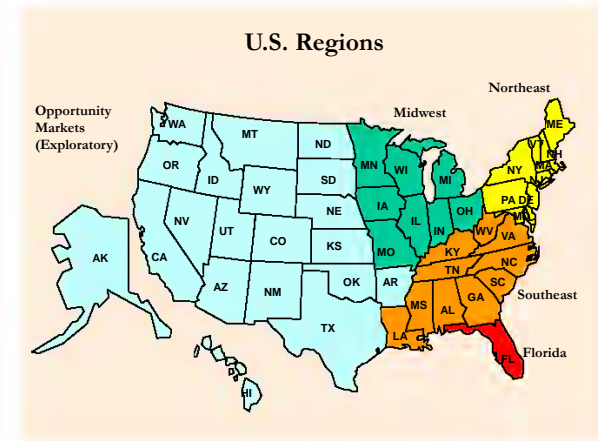
- Compared to last March, eight out of every ten (**81.3%**) lodging managers report their three month forward reservations levels as "up" or the "same":

<u>% of Properties (March)</u>	<u>2016</u>	<u>2017</u>
<u>Reporting Reservations:</u>		
Up	19.4%	50.0%
Same	32.3	31.3
Down	45.2	18.8

Naples, Marco Island, Everglades: March 2017 Summary

- 3. Collier's March visitation originates from the following primary market segments:**

<u>March Visitation</u>	<u>2017 Visitor #</u>	<u>Δ</u>
Florida	55,137	+9.6%
Southeast	13,611	-2.9
Northeast	66,442	+2.6
Midwest	47,294	+0.3
Canada	5,767	+12.7
Europe	32,298	+0.8
West	10,151	+11.3
Total	230,700	+3.7%



4. This March, seven out of every ten of the destination's patrons flew **(2016: 71.7%; 2017: 72.9%)**. A majority of these **(65.7%)** deplaned at RSW, with Miami capturing some **10.9%** of deplanements.
5. The typical March visitor party includes an average of **2.8** travelers who stay for **3.5** nights in the Naples, Marco Island, Everglades area.
6. Some **41.3%** of Collier's March visitors are in the destination for the first time **(2016: 42.1%)**.
7. Fully **97.1%** consulted the web for trip information, with some **81.3%** making bookings for their trip online.
8. The vast majority **(93.6%)** are satisfied with their Collier stay, with **88.5%** planning a future trip to the area **(2016: 89.1%)**.
9. This year, March visitors average **51.9** years of age **(2016: 52.4 years of age)**.

Naples, Marco Island, Everglades:

March 2017 Visitor Profile

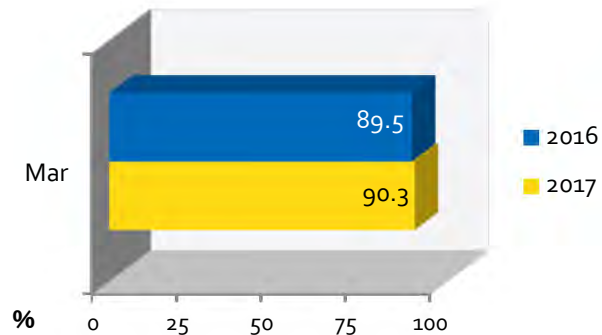


Naples, Marco Island, Everglades Visitor Profile March 2017

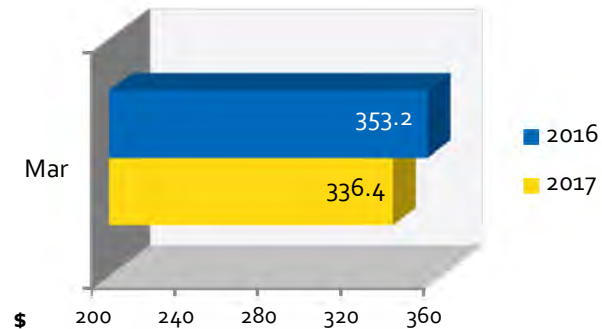
H/M/C* Visitor Statistics	Year to Date (Jan. – Mar.)			March		
	2016	2017	% Δ '16/'17	2016	2017	% Δ '16/'17
Visitors (#)	601,500	608,000	+1.1	222,500	230,700	+3.7
Room Nights	775,200	751,400	-3.1	277,500	273,300	-1.5
Direct Exp. (\$)	\$495,616,900	\$510,517,400	+3.0	\$210,198,000	\$223,594,400	+6.4
Total Eco. Impact (\$)	\$738,964,800	\$761,181,500	+3.0	\$313,405,200	\$333,379,300	+6.4

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

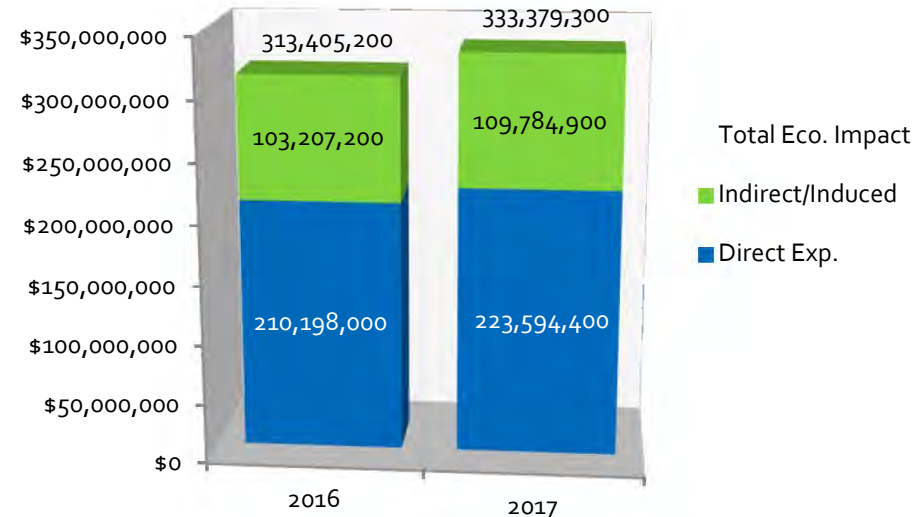
March Occupancy



March Room Rates



March Economic Impact



March

Lodging Statistics

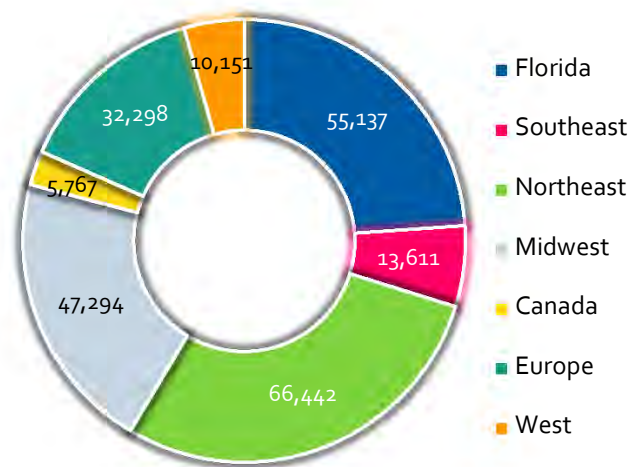
	2016	2017**	% Δ '16/'17
Occupancy	89.5%	90.3%	+0.9
Room Rates	\$353.2	\$336.4	-4.8
RevPAR	\$316.1	\$303.8	-3.9

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

March 2017 Visitor Origin Markets

Visitor Origins	2016		2017		% Δ '16/'17
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	22.6%	50,285	23.9%	55,137	+9.6
Southeast	6.3	14,018	5.9	13,611	-2.9
Northeast	29.1	64,748	28.8	66,442	+2.6
Midwest	21.2	47,170	20.5	47,294	+0.3
Canada	2.3	5,117	2.5	5,767	+12.7
Europe	14.4	32,040	14.0	32,298	+0.8
West	4.1	9,122	4.4	10,151	+11.3
Total	100.0	222,500	100.0	230,700	+3.7

March 2017 Visitor Origins



Naples, Marco Island, Everglades Visitor Profile March 2017

Transportation Mode (Multiple Response)	March 2016	March 2017
Plane	71.7%	72.9%
Rental Car	65.9	68.7
Personal Car	28.3	27.1

Airport Deplaned (Base: Flew)	March 2016	March 2017
Southwest Florida International	66.2%	65.7%
Miami International	11.9	10.9
Orlando International/Sanford	7.6	8.6
Ft. Lauderdale International	6.3	5.4
Tampa International	3.6	4.3

Purpose of Trip (Multiple Response)	March 2016	March 2017
Vacation/Weekend Getaway	81.9%	81.3%
Group Travel	22.6	23.4
Visit with Friends and Relatives	15.6	13.9

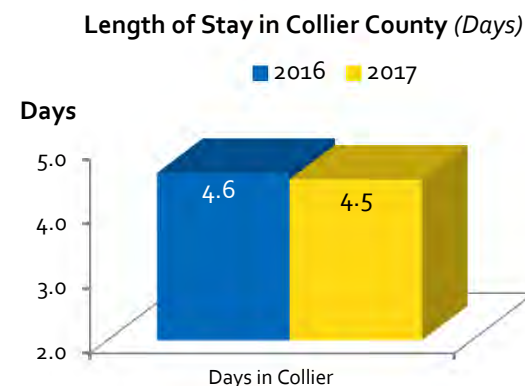
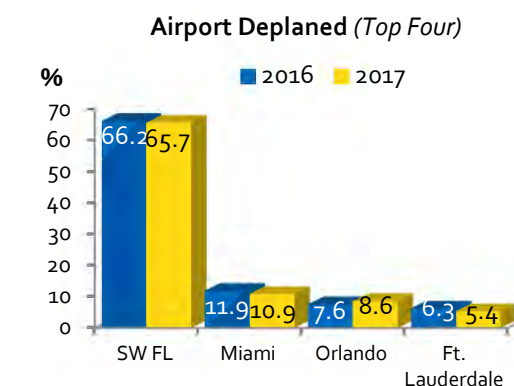
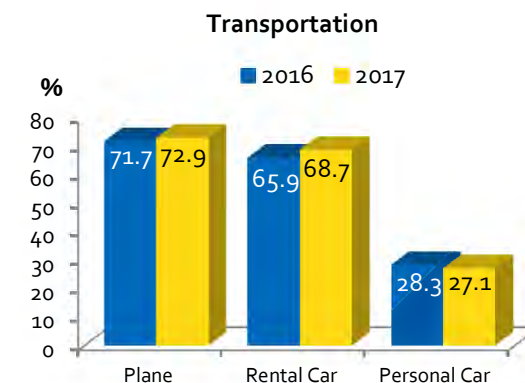
First Visit to (% yes)	March 2016	March 2017
Collier County	42.1%	41.3%
Florida	5.3	3.7

Length of Stay (Days)	March 2016	March 2017
In Collier County	4.6	4.5

Party Size	March 2016	March 2017
Number of People	2.7	2.8

Party Composition (Multiple Response)	March 2016	March 2017
Couple	61.9%	62.4%
Family	31.0	33.9
Group of Friends	6.5	7.0
Single	6.8	5.2

Did Party Have Lodging Reservations for Stay	March 2016	March 2017
% Yes	95.5%	95.7%



Naples, Marco Island, Everglades Visitor Profile

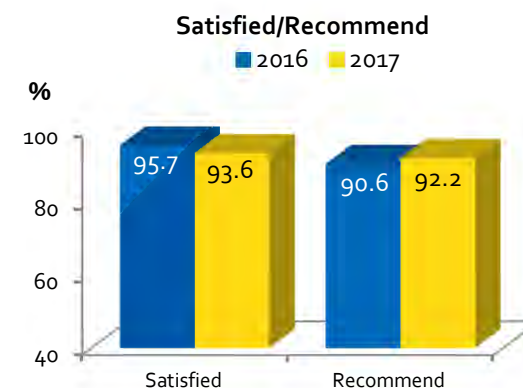
March 2017

Satisfaction with Collier County	March 2016	March 2017
Very Satisfied	85.7%	87.3%
Satisfied	10.0	6.3
Satisfaction Level (Combined)	95.7%	93.6%

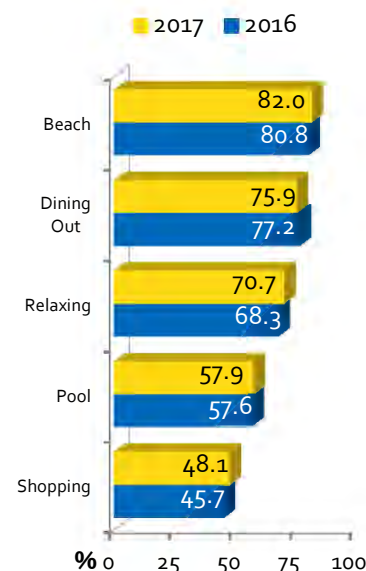
Activities Enjoyed in Area (Multiple Response)	March 2016	March 2017
Beach	80.8%	82.0%
Dining Out	77.2	75.9
Relaxing	68.3	70.7
Pool	57.6	57.9
Shopping	45.7	48.1
Swimming	34.5	35.2
Sightseeing	32.4	31.2
Reading	25.0	28.2
Sunsets	25.5	26.8
Sunning	22.5	26.3
Walking	21.0	22.8
Visiting with Friends/Relatives	23.7	22.6
Bars/Nightlife	20.1	17.3
Art Galleries/Shows/Fairs	18.3	17.1
Enjoying Nature/Bird Watching/Everglades	19.6	16.3
Shelling	14.7	16.0
Golfing	10.0	12.0
Canoeing/Kayaking	7.4	9.6

Expense Relative to Expectations	March 2016	March 2017
More Expensive	29.8%	23.0%
Less Expensive	1.1	3.0
As Expected	63.8	67.6

Demographics	March 2016	March 2017
Average Age Head of Household (Years)	52.4	51.9
Median Annual Household Income	\$170,114	\$176,217

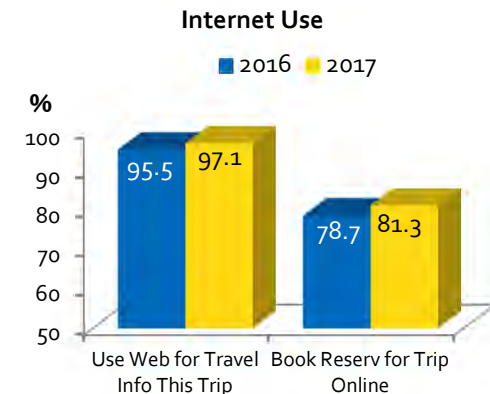
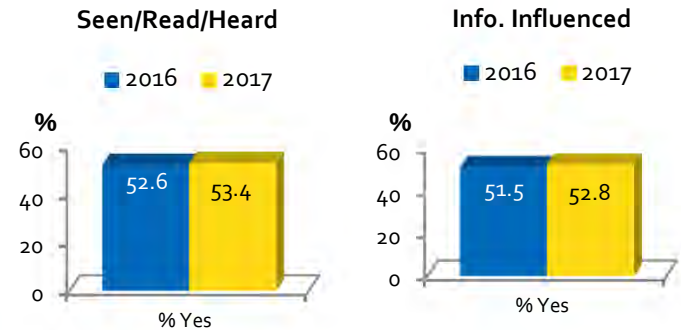


Activities Enjoyed in Area (Top Five)



Naples, Marco Island, Everglades Visitor Profile March 2017

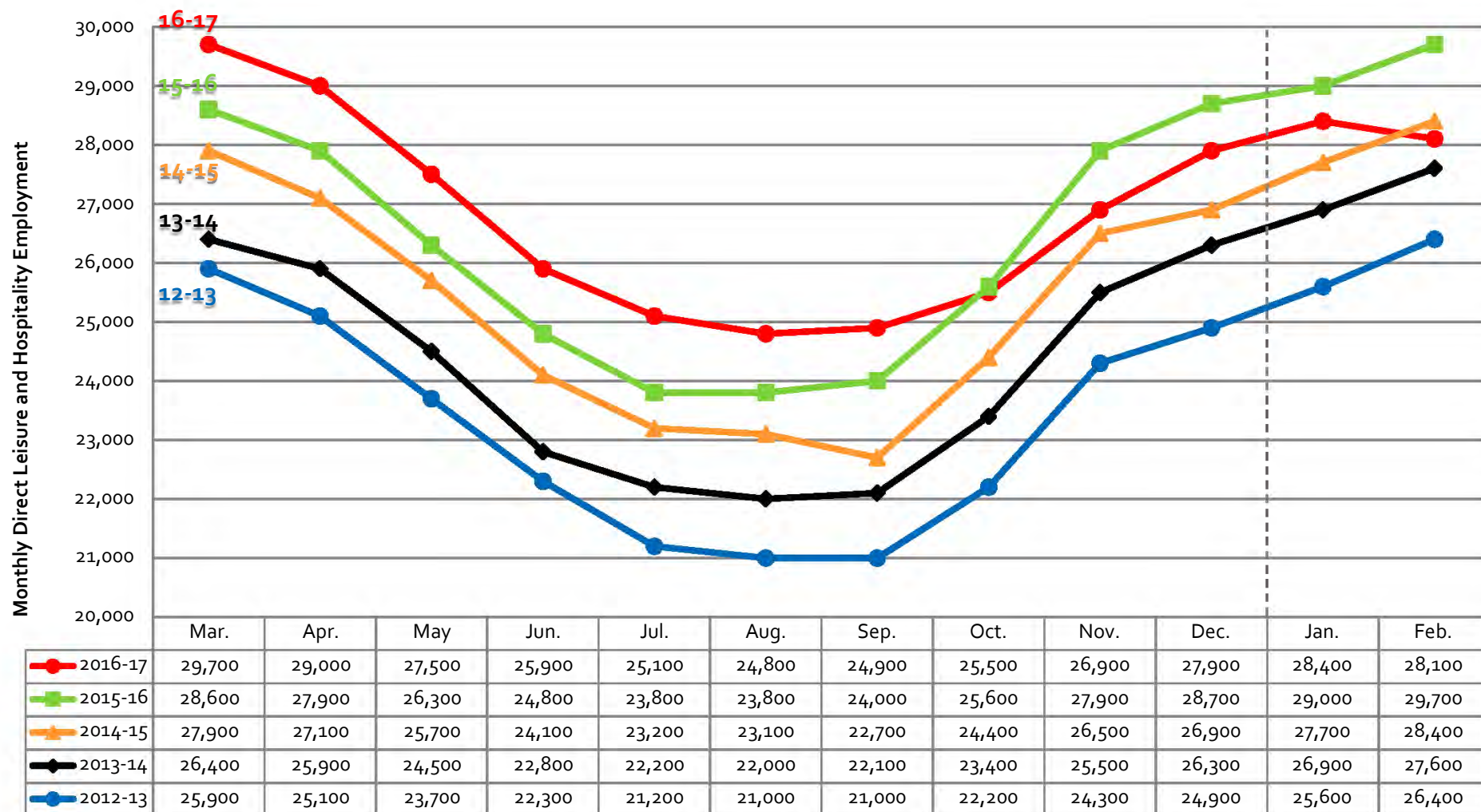
Recommend Collier to Friends/Relatives	March 2016	March 2017
% Yes	90.6%	92.2%
Plan to Return (% Yes)	March 2016	March 2017
To Local Area	89.1%	88.5%
Collier Base Budget	March 2016	March 2017
Total	\$2,550.72	\$2,713.75
Per Person/Stay	944.71	969.20
Per Person/Day	205.37	215.38
Area Information Seen/Read/Heard	March 2016	March 2017
% Yes	52.6%	53.4%
Directly Influenced by Information (Base: Seen/Read/Heard Area Information)	March 2016	March 2017
% Yes	51.5%	52.8%
Why Chose the Area (Multiple Response)	March 2016	March 2017
Beach Area	56.5%	56.0%
Weather	49.1	53.7
Previous Experience	33.7	35.7
Relaxing	37.6	34.9
Quiet/Peaceful/Laid Back	31.6	34.3
Recommendation	32.0	31.5
Restaurants	34.8	30.3
Appealing Brochures/Websites	27.8	29.6
Quality of Accommodations	26.1	26.9
Business/Meeting/Conference	23.8	25.0
Outdoor Recreation/Nature	25.0	22.1
Never Been	21.7	21.4
Not Crowded	17.5	17.2
Internet Use	March 2016	March 2017
Use Internet to Obtain Travel Info for This Trip (% Yes)	95.5%	97.1%
Book Reservations for Trip Online (%Yes)	78.7	81.3



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

