

RESEARCH DATA SERVICES, INC.

777 SOUTH HARBOUR ISLAND BOULEVARD • SUITE 260
TAMPA, FLORIDA 33602
TEL (813) 254-2975 • FAX (813) 223-2986



Naples, Marco Island, Everglades Convention and Visitors Bureau March 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

April 2018

Naples, Marco Island, Everglades: March 2018 Summary

Executive Summary: March 2018

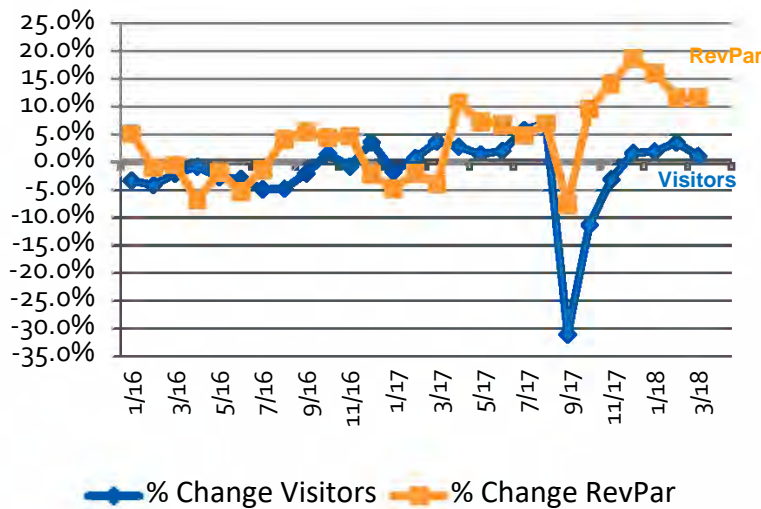
1. This March, some **233,300** visitors stayed in Collier's commercial lodgings **(+1.1%)***. Their visits contributed an estimated **\$348,873,000** of economic impact to the County **(+4.6%)**. Key performance metrics are as follows:

<u>March</u>	<u>2017</u>	<u>2018**</u>	<u>% Δ</u>
Occupancy	90.3%	91.1%	+0.9%
ADR	\$336.4	\$372.0	+10.6%
RevPAR	\$303.8	\$338.9	+11.6%

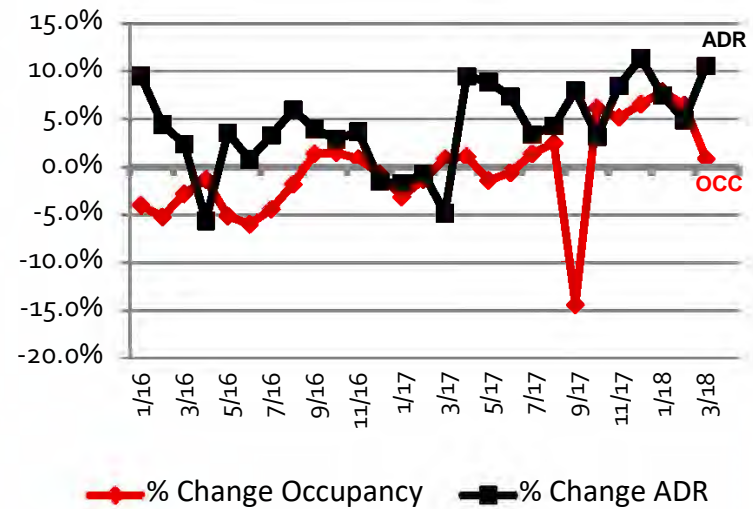
* As of March 2018, approximately 660 lodging units remain closed due to the impact of Hurricane Irma and restorations.

** Based on units available to be rented.

Key Collier Visitation Metrics (%Δ)



Key Collier Visitation Metrics (%Δ)



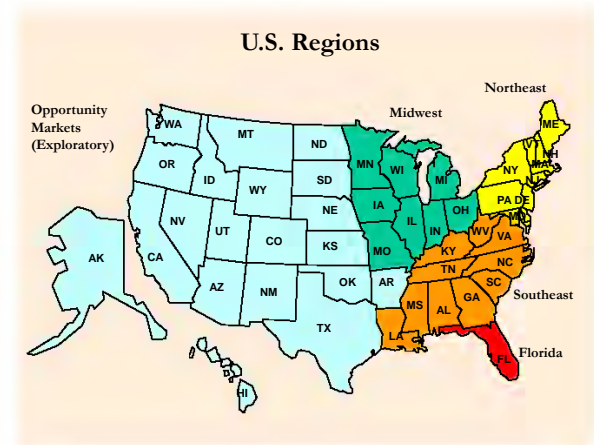
Naples, Marco Island, Everglades: March 2018 Summary

2. Compared to last March, over half (**51.7%**) of Collier lodging managers report their three month forward reservations levels as “up.”

% of Properties (March)			
<u>Reporting Reservations:</u>			
	<u>2017</u>	<u>2018</u>	
Up	50.0%	51.7%	
Same	31.3	37.9	
Down	18.8	10.3	

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

<u>March Visitation</u>	<u>2018</u>	
	<u>Visitor #</u>	<u>Δ</u>
Florida	50,159	-9.0%
Southeast	14,464	+6.3
Northeast	68,124	+2.5
Midwest	49,460	+4.6
Canada	4,666	-19.1
Europe	37,328	+15.6
Other	9,099	-10.4
Total	233,300	+1.1%



4. This March, seven out of every ten of the destination’s visitor parties flew (**2017: 72.9%; 2018: 76.8%**). A majority of these (**60.5%**) deplaned at RSW, with Miami capturing some **14.3%** of deplanements.
5. This March, visitor party size averaged **2.9** travelers who stayed for **3.4** nights in the Naples, Marco Island, Everglades area (**2017: 2.8 people; 3.5 nights**).

Naples, Marco Island, Everglades: March 2018 Summary

6. Some **42.6%** of Collier's March visitors are in the destination for the first time.
7. Fully **95.4%** consult the web for trip information, with some **79.4%** making bookings for their trip online.
8. The vast majority (**95.3%**) are satisfied with their Collier stay, with **91.5%** planning a future trip to the area.
9. The typical March visitor is **52.6 years of age (2017: 51.9 years)**.

Naples, Marco Island, Everglades:

March 2018 Visitor Profile



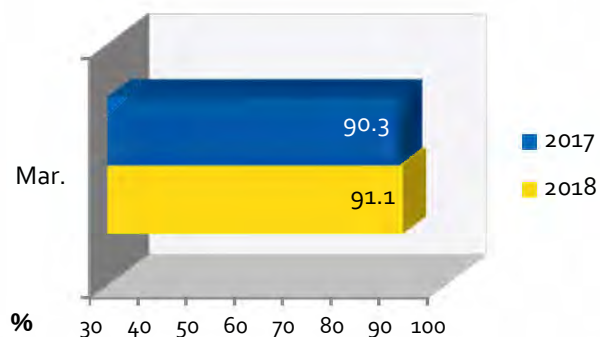
Naples, Marco Island, Everglades Visitor Profile

March 2018

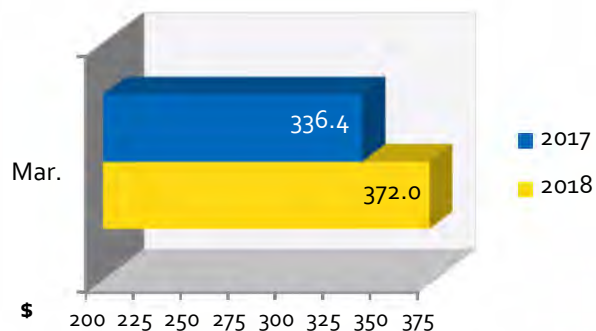
H/M/C+ Visitor Statistics	Year to Date (January – March)			March		
	2017	2018	% Δ '17/'18	2017	2018*	% Δ '17/'18
Visitors (#)	608,000	621,000	+2.1	230,700	233,300	+1.1
Room Nights	751,400	744,600	-0.9	273,300	265,500	-2.9
Direct Exp. (\$)	\$510,517,400	\$540,565,200	+5.9	\$223,594,400	\$233,985,900	+4.6
Total Eco. Impact (\$)	\$761,181,500	\$805,982,800	+5.9	\$333,379,300	\$348,873,000	+4.6

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

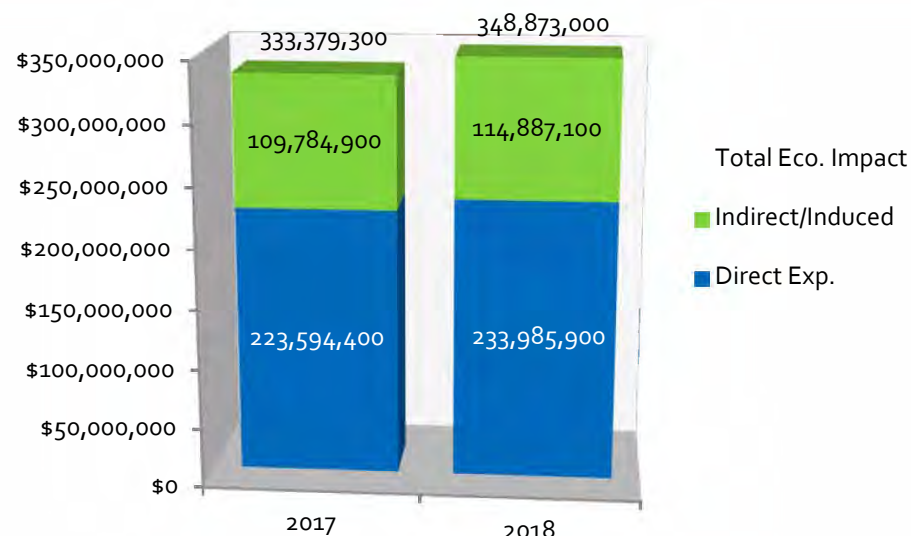
March Occupancy



March Room Rates



March Economic Impact



March

Lodging Statistics

	2017	2018**	% Δ '17/'18
Occupancy	90.3%	91.1%	+0.9
Room Rates	\$336.4	\$372.0	+10.6
RevPAR	\$303.8	\$338.9	+11.6

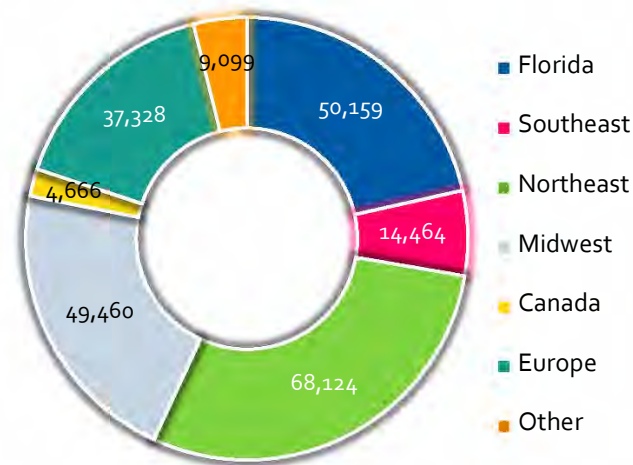
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March 2018 Visitor Origin Markets

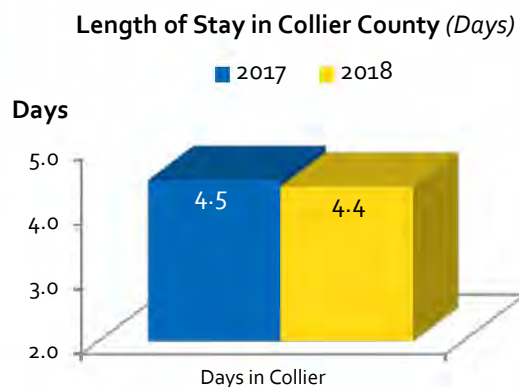
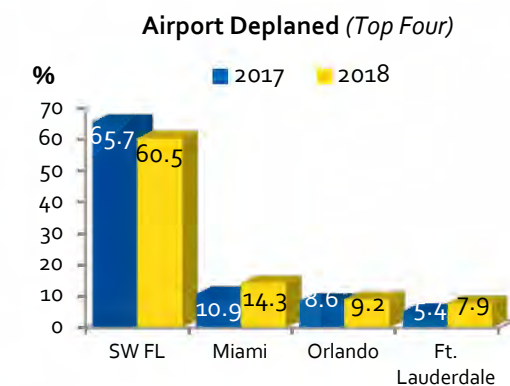
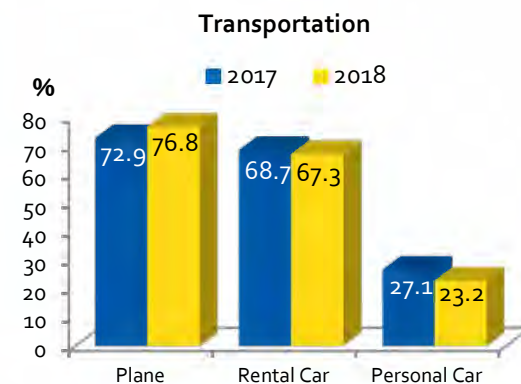
Visitor Origins	2017		2018		% Δ '17/'18
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	23.9%	55,137	21.5%	50,159	-9.0
Southeast	5.9	13,611	6.2	14,464	+6.3
Northeast	28.8	66,442	29.2	68,124	+2.5
Midwest	20.5	47,294	21.2	49,460	+4.6
Canada	2.5	5,767	2.0	4,666	-19.1
Europe	14.0	32,298	16.0	37,328	+15.6
Other	4.4	10,151	3.9	9,099	-10.4
Total	100.0	230,700	100.0	233,300	+1.1

March 2018 Visitor Origins



Naples, Marco Island, Everglades Visitor Profile | March 2018

Transportation Mode (Multiple Response)	March 2017	March 2018	
Plane	72.9%	76.8%	↑
Rental Car	68.7	67.3	
Personal Car	27.1	23.2	↓
Airport Deplaned (Base: Flew)	March 2017	March 2018	
Southwest Florida International	65.7%	60.5%	↓
Miami International	10.9	14.3	
Orlando International/Sanford	8.6	9.2	↑
Ft. Lauderdale International	5.4	7.9	
Tampa International	4.3	5.3	↑
Purpose of Trip (Multiple Response)	March 2017	March 2018	
Vacation/Weekend Getaway	81.3%	84.2%	↑
Group Travel	23.4	21.9	↓
Visit with Friends and Relatives	13.9	12.8	↓
First Visit to (% yes)	March 2017	March 2018	
Collier County	41.3%	42.6%	↑
Florida	3.7	4.3	
Length of Stay (Days)	March 2017	March 2018	
In Collier County	4.5	4.4	↓
Party Size	March 2017	March 2018	
Number of People	2.8	2.9	↑



Naples, Marco Island, Everglades Visitor Profile | March 2018

Party Composition (Multiple Response)	March 2017	March 2018	
Couple	62.4%	60.7%	↓
Family	33.9	34.8	↑
Group of Friends	7.0	5.5	↓
Single	5.2	4.6	

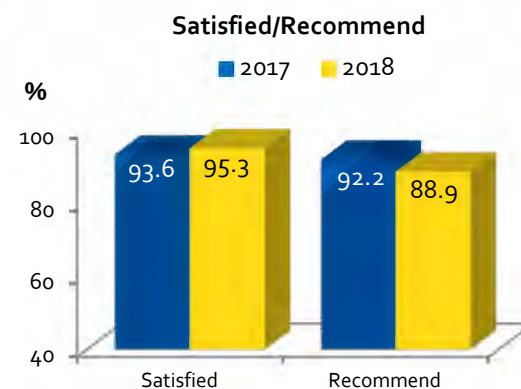
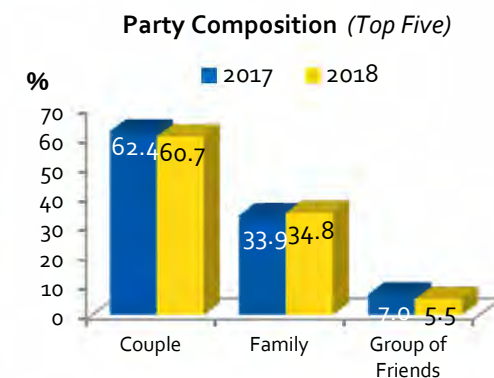
Did Party Have Lodging Reservations for Stay	March 2017	March 2018	
% Yes	95.7%	97.9%	↑

Expense Relative to Expectations	March 2017	March 2018	
More Expensive	23.0%	27.2%	↑
Less Expensive	3.0	1.4	
As Expected	67.6	68.8	↑

Satisfaction with Collier County	March 2017	March 2018	
Very Satisfied	87.3%	83.0%	↓
Satisfied	6.3	12.3	↓
Satisfaction Level (Combined)	93.6%	95.3%	↑

Recommend Collier to Friends/Relatives	March 2017	March 2018	
% Yes	92.2%	88.9%	↓

Plan to Return (% Yes)	March 2017	March 2018	
To Local Area	88.5%	91.5%	↑



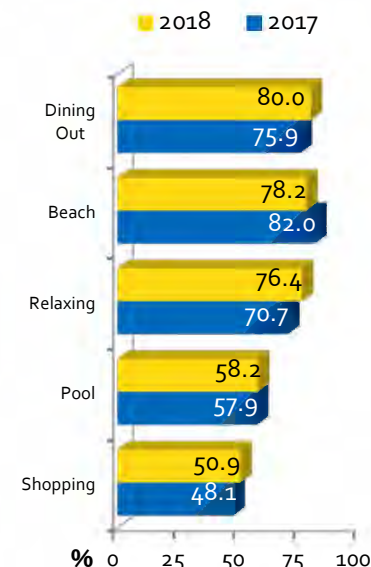
Naples, Marco Island, Everglades Visitor Profile | March 2018

Activities Enjoyed in Area (Multiple Response)	March 2017	March 2018	
Dining Out	75.9%	80.0%	↑
Beach	82.0	78.2	
Relaxing	70.7	76.4	↑
Pool	57.9	58.2	
Shopping	48.1	50.9	↑
Swimming	35.2	33.1	
Sightseeing	31.2	30.1	↓
Reading	28.2	29.3	
Walking	22.8	26.4	↑
Sunsets	26.8	25.0	
Bars/Nightlife	17.3	23.6	↑
Sunning	26.3	23.6	
Enjoying Nature/Bird Watching/Everglades	16.3	22.4	↑
Visiting with Friends/Relatives	22.6	20.0	↓
Art Galleries/Shows/Fairs	17.1	18.2	↑
Shelling	16.0	14.8	↓
Golfing	12.0	8.5	↓

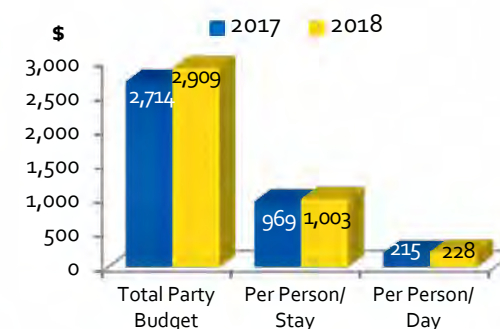
Demographics	March 2017	March 2018	
Average Age Head of Household (Years)	51.9	52.6	↑
Median Annual Household Income	\$176,217	\$177,932	↑

Collier Base Budget	March 2017	March 2018	
Total	\$2,713.75	\$2,908.54	↑
Per Person/Stay	969.20	1,002.94	↑
Per Person/Day	215.38	227.94	↑

Activities Enjoyed in Area (Top Five)

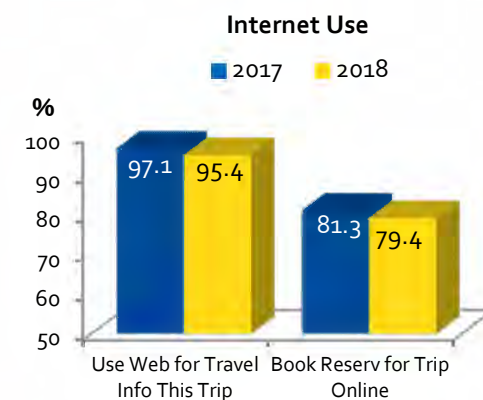
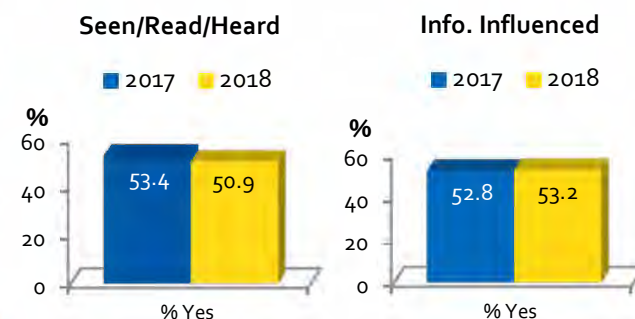


Collier Base Budgets



Naples, Marco Island, Everglades Visitor Profile | March 2018

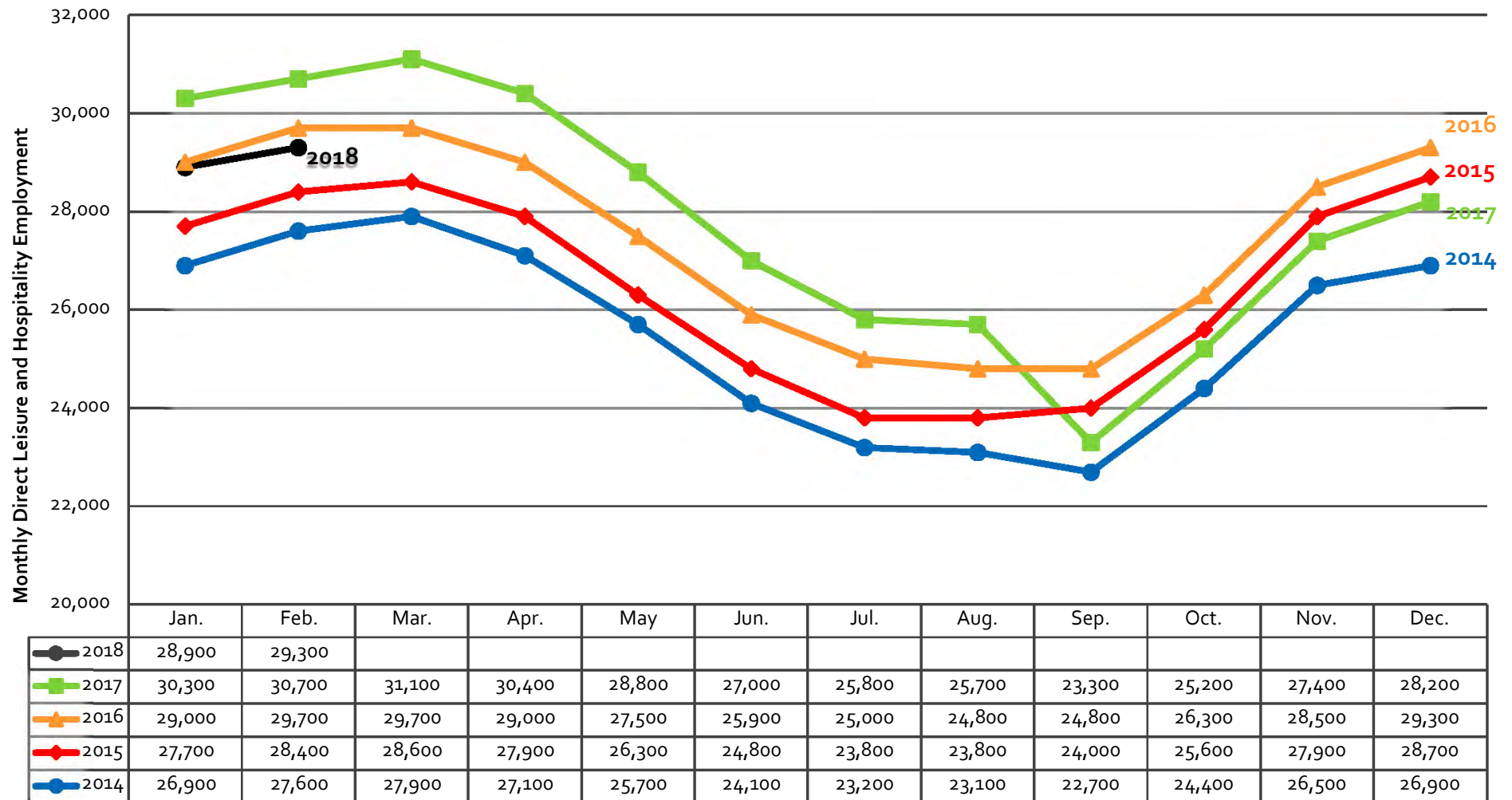
Area Information Seen/Read/Heard	March 2017	March 2018
% Yes	53.4%	50.9% ↓
Directly Influenced by Information (Base: Seen/Read/Heard Area Information)		
	March 2017	March 2018
% Yes	52.8%	53.2% ↑
Why Chose the Area (Multiple Response)		
	March 2017	March 2018
Beach Area	56.0%	54.5% ↓
Weather	53.7	49.1
Previous Experience	35.7	34.3 ↓
Relaxing	34.9	32.7
Quiet/Peaceful/Laid Back	34.3	29.1 ↓
Restaurants	30.3	29.0
Recommendation	31.5	28.8 ↓
Quality of Accommodations	26.9	27.3
Appealing Brochures/Websites	29.6	26.8 ↓
Outdoor Recreation/Nature	22.1	25.4
Business/Meeting/Conference	25.0	22.6 ↓
Never Been	21.4	21.8
Not Crowded	17.2	15.8 ↓
Internet Use		
	March 2017	March 2018
Use Internet to Obtain Travel Info for This Trip (% Yes)	97.1%	95.4% ↓
Book Reservations for Trip Online (%Yes)	81.3	79.4



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

