

# 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 May 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.

[www.ResearchDataLLC.com](http://www.ResearchDataLLC.com)

June 2017

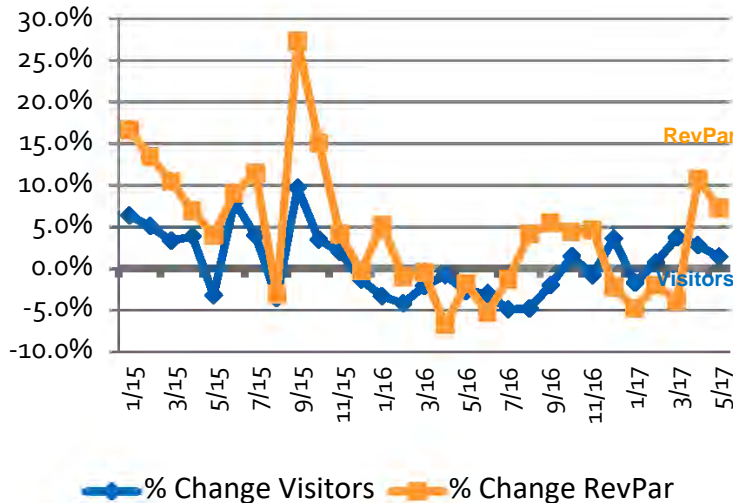
# Naples, Marco Island, Everglades: May 2017 Summary

## Executive Summary: May 2017

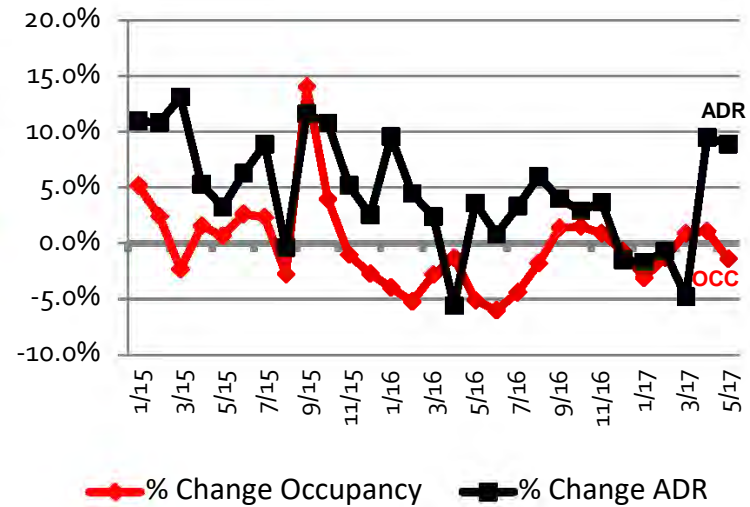
- This May, some **137,200** visitors stayed in Collier's commercial lodgings (**+1.4%**). Their visits contributed an estimated **\$166,462,800** of economic impact to the County (**+6.8%**). Key performance metrics are as follows:

	<u>May</u>	<u>2016</u>	<u>2017</u>	<u>% Δ</u>
Occupancy		70.1%	69.1%	-1.4%
ADR		\$197.6	\$215.1	+8.9%
RevPAR		\$138.5	\$148.6	+7.3%

Key Collier Visitation Metrics (%Δ)



Key Collier Visitation Metrics (%Δ)



- Compared to last May, nearly nine out of ten (**87.4%**) lodging managers report their three month forward reservations levels as "up" or the "same."

### % of Properties (May)

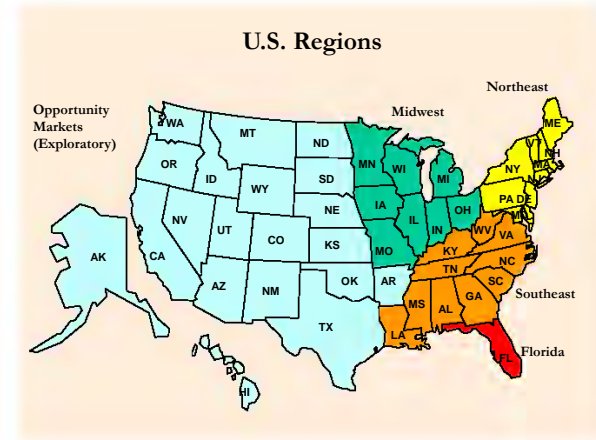
#### Reporting Reservations:

	<u>2016</u>	<u>2017</u>
Up	33.5%	40.0%
Same	37.9	47.4
Down	19.8	12.6

## Naples, Marco Island, Everglades: May 2017 Summary

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

<u>May Visitation</u>	<u>2017 Visitor #</u>	<u>Δ</u>
Florida	56,252	+0.7%
Southeast	11,388	+5.2
Northeast	20,031	-2.6
Midwest	18,522	+7.8
Canada	3,293	-13.1
Europe	21,129	-2.4
West	6,585	+21.7
<b>Total</b>	<b>137,200</b>	<b>+1.4%</b>



4. This May, six out of every ten of the destination's patrons flew (**2016: 58.1%; 2017: 59.0%**). A majority of these (**64.4%**) deplaned at RSW, with Miami capturing some **19.1%** of deplanements.
5. The typical May visitor party includes an average of **2.5** travelers who stay for **3.0** nights in the Naples, Marco Island, Everglades area.
6. Some **48.0%** of Collier's May visitors are in the destination for the first time (**2016: 51.6%**).
7. Fully **95.5%** consult the web for trip information, with some **81.7%** making bookings for their trip online.
8. The vast majority (**97.5%**) are satisfied with their Collier stay, with **89.0%** planning a future trip to the area (**2016: 89.9%**).
9. This year, May visitors average **46.7** years of age (**2016: 47.6 years of age**).

# Naples, Marco Island, Everglades: *May 2017 Visitor Profile*

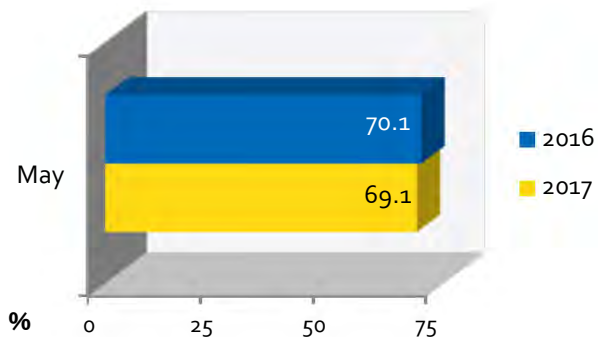


# Naples, Marco Island, Everglades Visitor Profile | May 2017

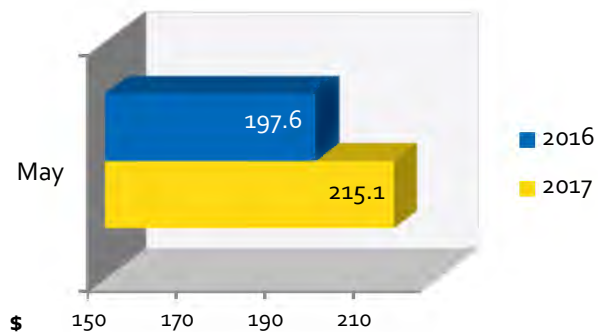
H/M/C* Visitor Statistics	Year to Date (January – May)			May		
	2016	2017	% Δ '16/'17	2016	2017	% Δ '16/'17
Visitors (#)	875,400	887,700	+1.4	135,300	137,200	+1.4
Room Nights	1,178,900	1,160,800	-1.5	186,000	186,600	+0.3
Direct Exp. (\$)	\$739,146,700	\$769,074,300	+4.0	\$104,505,700	\$111,645,100	+6.8
<b>Total Eco. Impact (\$)</b>	<b>\$1,102,067,700</b>	<b>\$1,146,689,800</b>	<b>+4.0</b>	<b>\$155,818,000</b>	<b>\$166,462,800</b>	<b>+6.8</b>

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

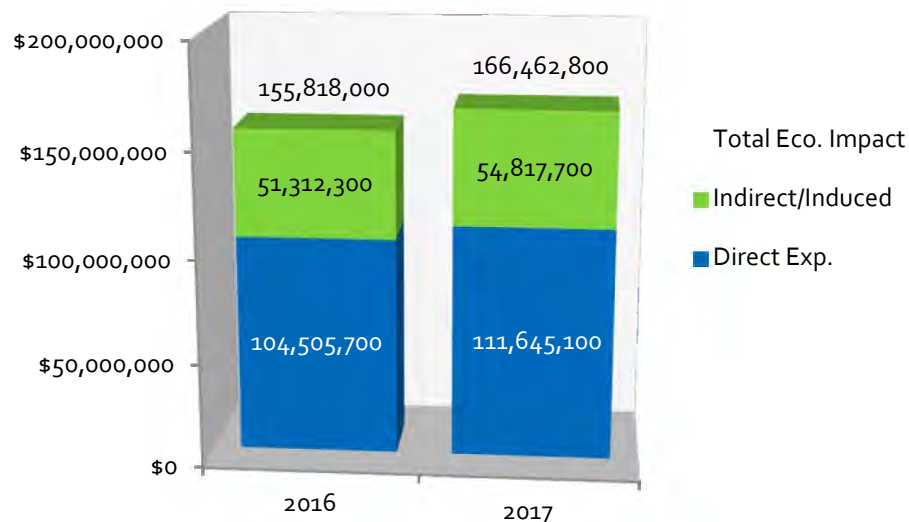
### May Occupancy



### May Room Rates



### May Economic Impact



### May

#### Lodging Statistics

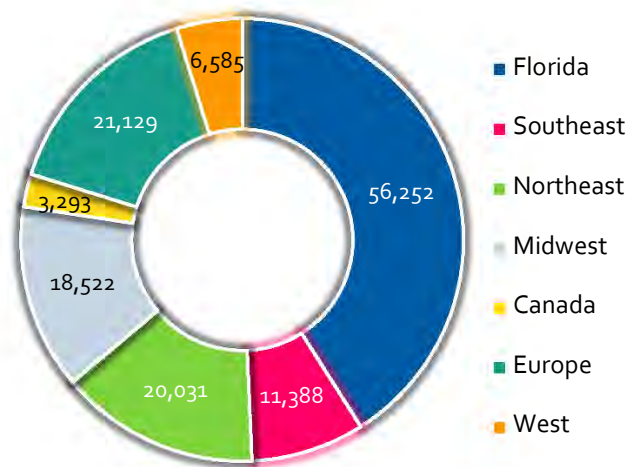
	2016	2017**	% Δ '16/'17
Occupancy	70.1%	69.1%	-1.4
Room Rates	\$197.6	\$215.1	+8.9
RevPAR	\$138.5	\$148.6	+7.3

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

May 2017 Visitor Origin Markets

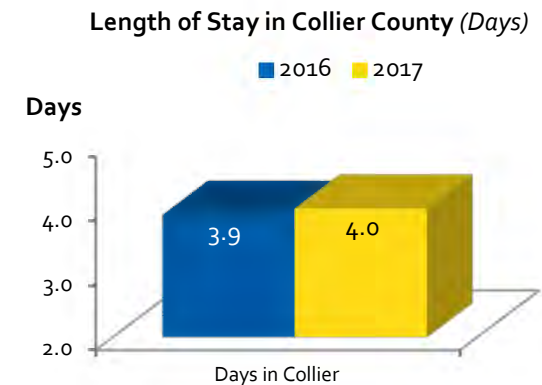
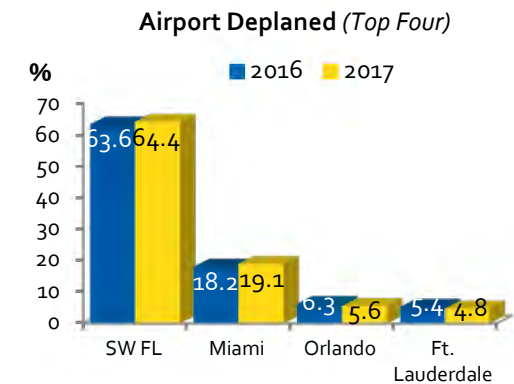
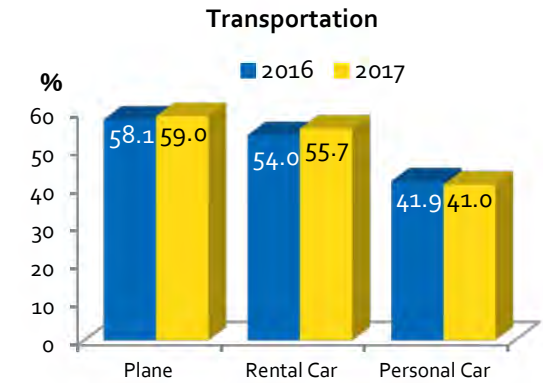
Visitor Origins	2016		2017		% Δ '16/'17
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	41.3%	55,879	41.0%	56,252	+0.7
Southeast	8.0	10,824	8.3	11,388	+5.2
Northeast	15.2	20,566	14.6	20,031	-2.6
Midwest	12.7	17,183	13.5	18,522	+7.8
Canada	2.8	3,788	2.4	3,293	-13.1
Europe	16.0	21,648	15.4	21,129	-2.4
West	4.0	5,412	4.8	6,585	+21.7
<b>Total</b>	<b>100.0</b>	<b>135,300</b>	<b>100.0</b>	<b>137,200</b>	<b>+1.4</b>

May 2017 Visitor Origins



# Naples, Marco Island, Everglades Visitor Profile | May 2017

<b>Transportation Mode (Multiple Response)</b>	May 2016	May 2017
Plane	58.1%	59.0%
Rental Car	54.0	55.7
Personal Car	41.9	41.0
<b>Airport Deplaned (Base: Flew)</b>	May 2016	May 2017
Southwest Florida International	63.6%	64.4%
Miami International	18.2	19.1
Orlando International/Sanford	6.3	5.6
Ft. Lauderdale International	5.4	4.8
Tampa International	4.9	4.4
<b>Purpose of Trip (Multiple Response)</b>	May 2016	May 2017
Vacation/Weekend Getaway	80.5%	83.0%
Group Travel	24.8	24.2
Visit with Friends and Relatives	9.8	11.0
<b>First Visit to (% yes)</b>	May 2016	May 2017
Collier County	51.6%	48.0%
Florida	5.8	6.8
<b>Length of Stay (Days)</b>	May 2016	May 2017
In Collier County	3.9	4.0
<b>Party Size</b>	May 2016	May 2017
Number of People	2.4	2.5
<b>Party Composition (Multiple Response)</b>	May 2016	May 2017
Couple	49.5%	50.5%
Family	37.8	38.4
Single	12.8	10.7
Group of Friends	4.7	5.5
<b>Did Party Have Lodging Reservations for Stay</b>	May 2016	May 2017
% Yes	92.6%	91.5%



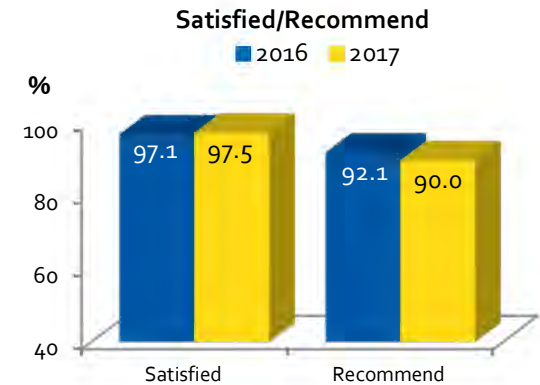
# Naples, Marco Island, Everglades Visitor Profile | May 2017

Satisfaction with Collier County	May 2016	May 2017
Very Satisfied	83.8%	84.7%
Satisfied	13.3	12.8
<b>Satisfaction Level (Combined)</b>	<b>97.1%</b>	<b>97.5%</b>

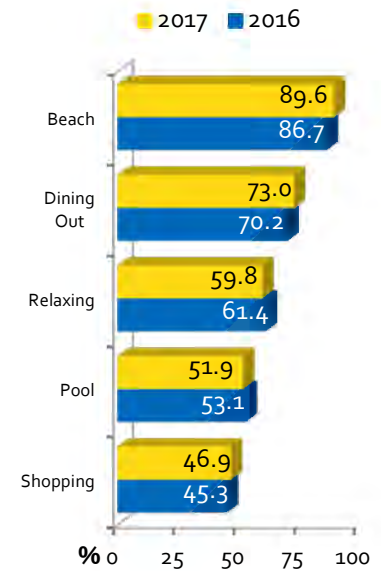
Activities Enjoyed in Area (Multiple Response)	May 2016	May 2017
Beach	86.7%	89.6%
Dining Out	70.2	73.0
Relaxing	61.4	59.8
Pool	53.1	51.9
Shopping	45.3	46.9
Sunsets	29.5	32.9
Swimming	33.3	31.6
Enjoying Nature/Bird Watching/Everglades	30.7	31.3
Reading	29.0	28.2
Walking	21.8	27.4
Sunning	22.5	26.8
Sightseeing	26.2	23.3
Bars/Nightlife	19.8	17.6
Art Galleries/Shows/Fairs	14.6	15.1
Visiting with Friends/Relatives	12.2	13.5
Golfing	10.1	9.2

Expense Relative to Expectations	May 2016	May 2017
More Expensive	17.2%	14.4%
Less Expensive	3.6	3.1
As Expected	70.0	75.0

Demographics	May 2016	May 2017
Average Age Head of Household (Years)	47.6	46.7
Median Annual Household Income	\$140,917	\$142,006



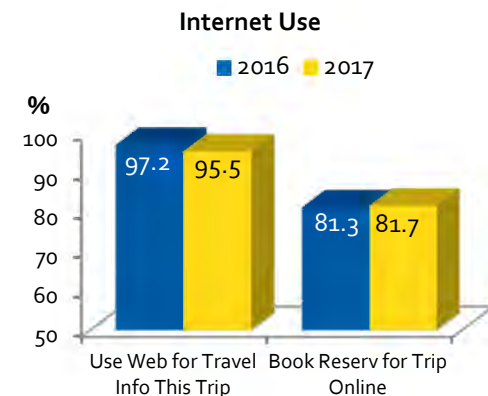
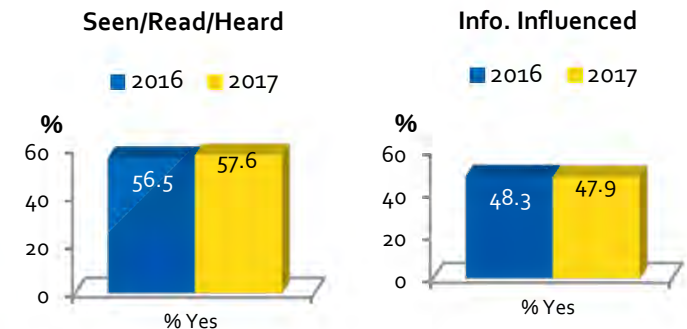
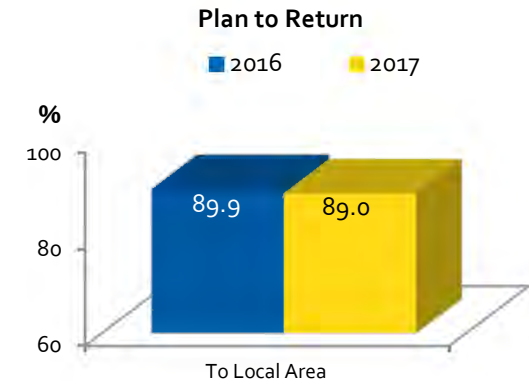
Activities Enjoyed in Area (Top Five)





# Naples, Marco Island, Everglades Visitor Profile | May 2017

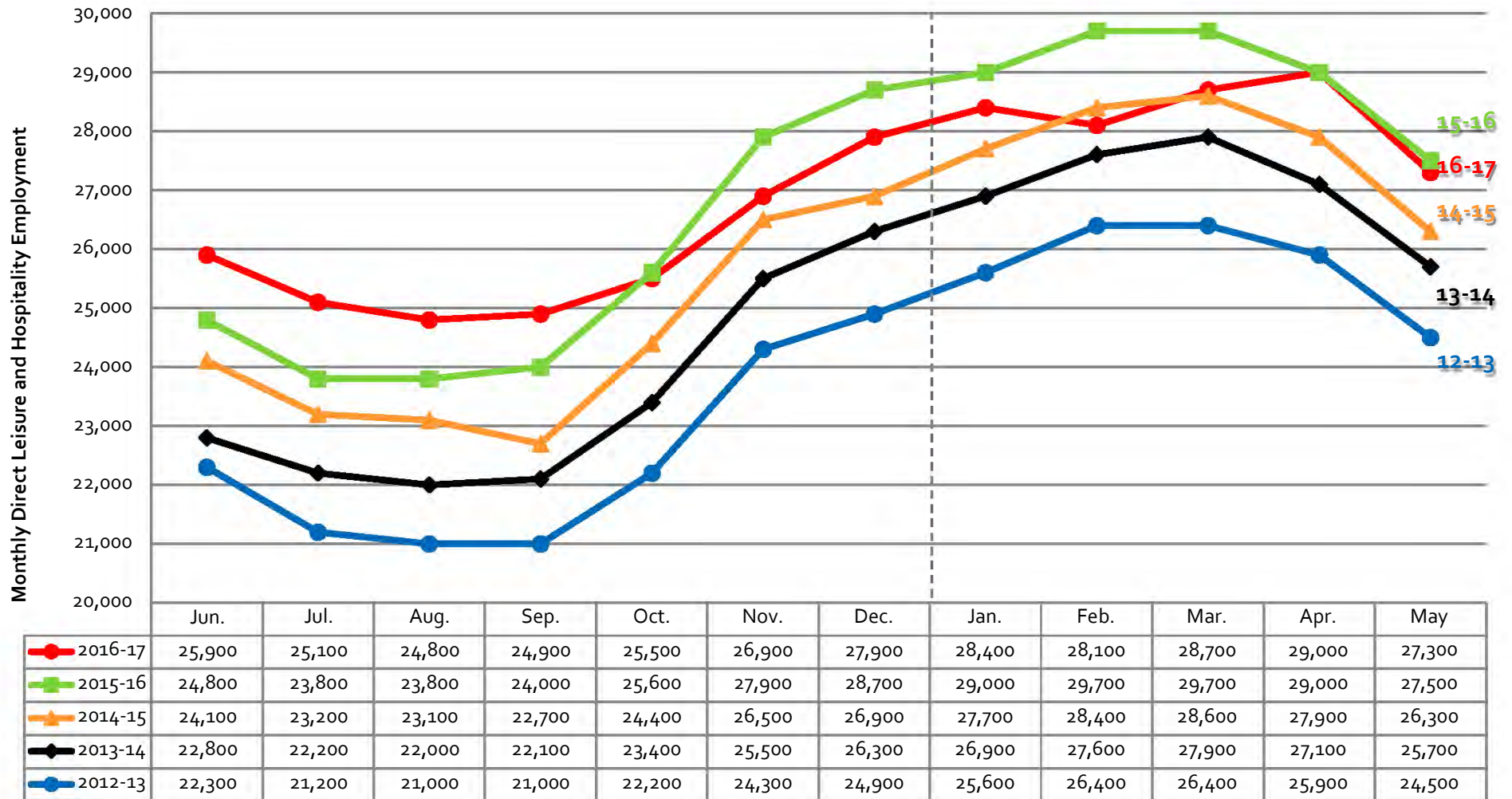
Recommend Collier to Friends/Relatives	May 2016	May 2017
% Yes	92.1%	90.0%
Plan to Return (% Yes)	May 2016	May 2017
To Local Area	89.9%	89.0%
Collier Base Budget	May 2016	May 2017
Total	\$1,853.75	\$2,034.36
Per Person/Stay	772.40	813.74
Per Person/Day	198.05	203.44
Area Information Seen/Read/Heard	May 2016	May 2017
% Yes	56.5%	57.6%
Directly Influenced by Information (Base: Seen/Read/Heard Area Information)	May 2016	May 2017
% Yes	48.3%	47.9%
Why Chose the Area (Multiple Response)	May 2016	May 2017
Beach Area	50.9%	53.8%
Weather	48.1	45.8
Relaxing	37.4	34.9
Previous Experience	32.2	33.5
Quiet/Peaceful/Laid Back	27.1	30.2
Recommendation	33.6	29.8
Quality of Accommodations	31.5	29.5
Restaurants	29.9	28.8
Outdoor Recreation/Nature	29.7	27.3
Not Crowded	24.3	25.7
Business/Meeting/Conference	24.1	23.8
Appealing Brochures/Websites	21.6	22.3
Never Been	24.8	22.0
Internet Use	May 2016	May 2017
Use Internet to Obtain Travel Info for This Trip (% Yes)	97.2%	95.5%
Book Reservations for Trip Online (%Yes)	81.3	81.7



## Industry Data: *2012-2017*

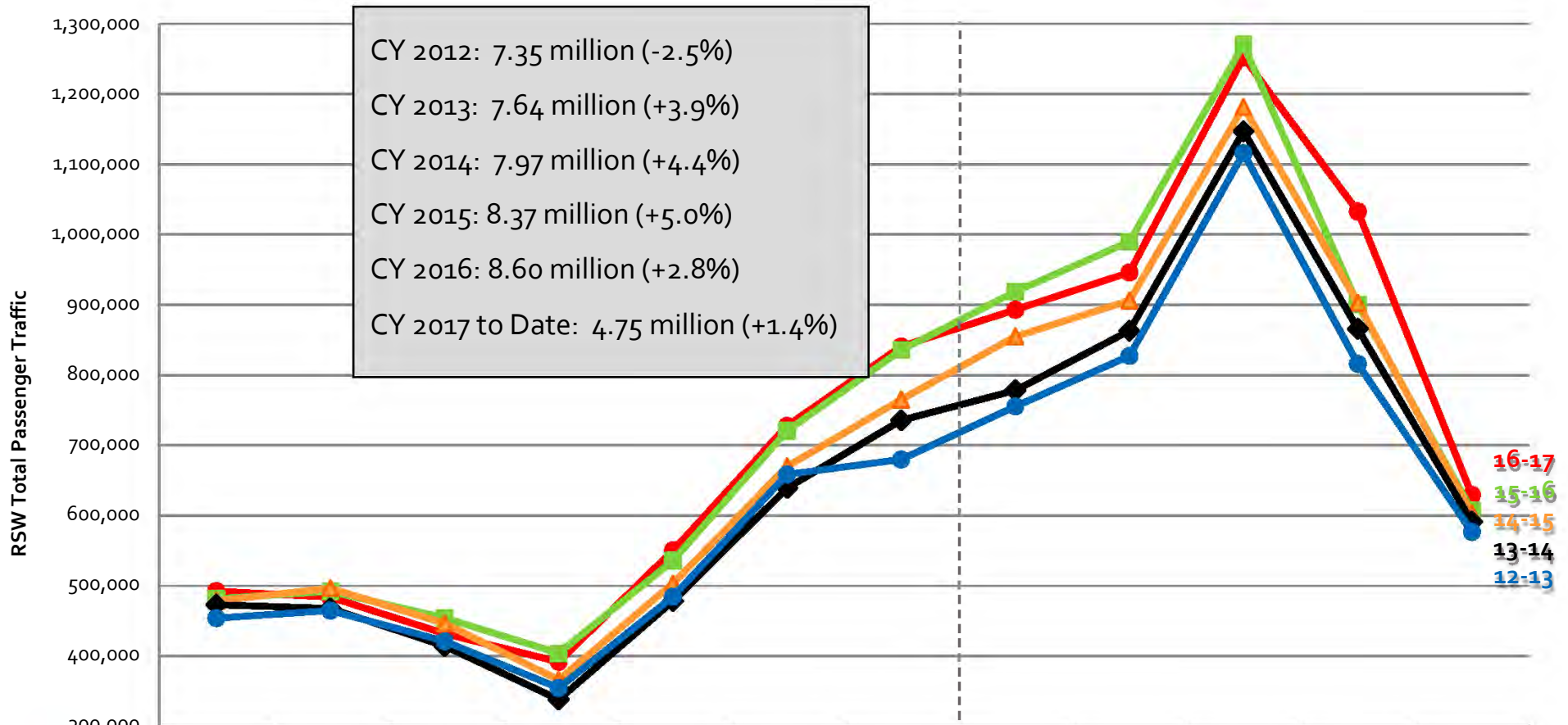


Collier Direct Leisure and Hospitality Employment (Calendar Year) \*



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

### Southwest Florida International Airport (RSW) Passenger Traffic



	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May
2016-17	492,413	484,074	431,729	391,844	550,316	727,634	840,501	892,905	946,079	1,252,124	1,032,783	629,321
2015-16	481,512	492,114	454,360	404,045	535,921	720,556	835,359	918,929	989,845	1,269,961	900,594	606,833
2014-15	478,692	496,472	446,402	366,038	503,243	669,567	765,288	854,953	906,039	1,181,382	902,669	602,891
2013-14	473,208	467,946	414,303	338,175	478,376	639,047	735,739	778,163	862,899	1,147,059	865,554	591,116
2012-13	454,044	464,896	421,211	354,640	484,768	658,629	679,672	755,232	827,147	1,115,937	815,978	576,713