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Naples, Marco Island, Everglades Convention and Visitors Bureau May 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

June 2018

Naples, Marco Island, Everglades: May 2018 Summary

Executive Summary: May 2018

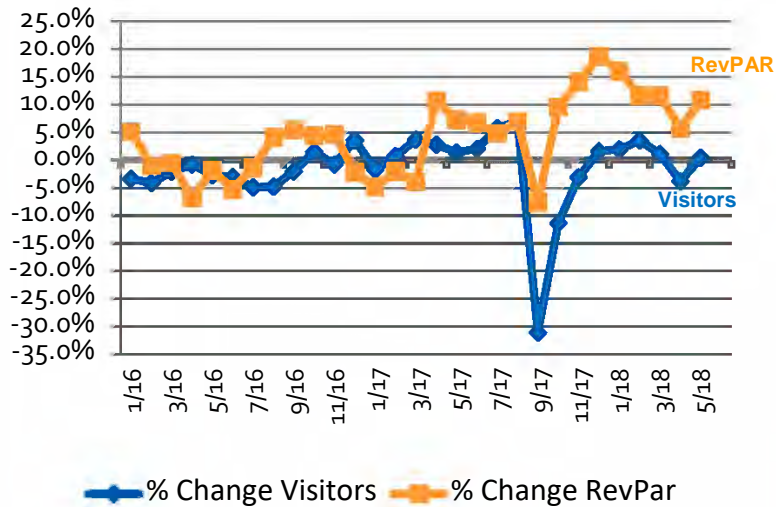
- This May, some **137,700** visitors stayed in Collier's commercial lodgings (**+0.4%**)*. Their visits contributed an estimated **\$172,922,900** of economic impact to the County (**+3.9%**). Key performance metrics are as follows:

<u>May</u>	<u>2017</u>	<u>2018**</u>	<u>% Δ</u>
Occupancy	69.1%	71.0%	+2.7%
ADR	\$215.1	\$232.0	+7.9%
RevPAR	\$148.6	\$164.7	+10.8%

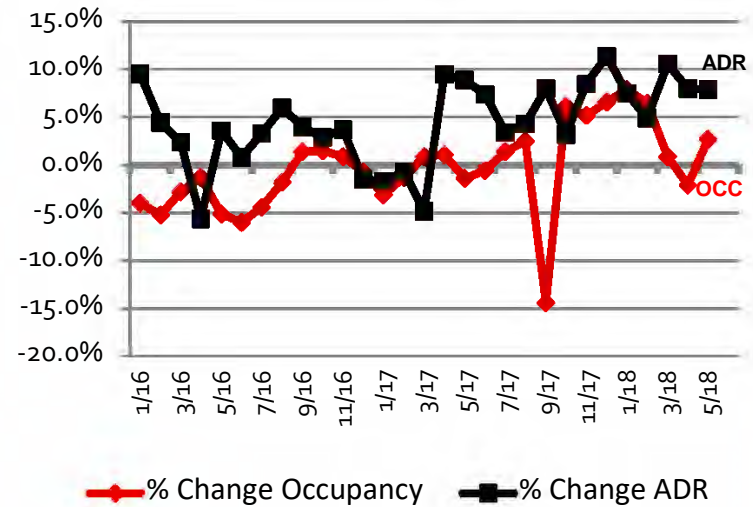
* As of May 2018, approximately 650 lodging units remain closed due to the impact of Hurricane Irma and restorations.

** Based on units available to be rented.

Key Collier Visitation Metrics (%Δ)



Key Collier Visitation Metrics (%Δ)



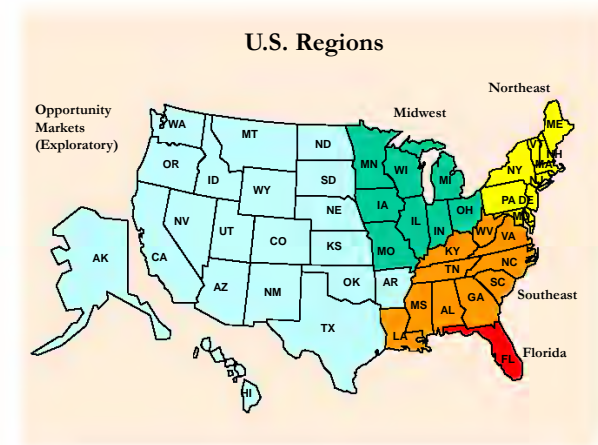
Naples, Marco Island, Everglades: May 2018 Summary

2. Compared to last May, nearly two-thirds (**62.7%**) of Collier lodging managers report their three month forward reservations levels as “up.”

% of Properties (May)		
<u>Reporting Reservations:</u>	<u>2017</u>	<u>2018</u>
Up	40.0%	62.7%
Same	47.4	30.0
Down	12.6	7.3

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

<u>May Visitation</u>	<u>2018</u> <u>Visitor #</u>	<u>Δ</u>
Florida	58,936	+4.8%
Southeast	11,016	-3.3
Northeast	20,517	+2.4
Midwest	17,350	-6.3
Canada	2,616	-20.6
Europe	20,242	-4.2
Other	7,023	+6.7
Total	137,700	+0.4%



4. This May, over half of the destination’s visitor parties flew (**2017: 59.0%; 2018: 56.7%**). A majority of these (**59.7%**) deplaned at RSW, with Miami capturing some **21.8%** of deplanements.
5. This May, visitor party size averaged **2.4** travelers who stayed for **2.9 nights** in the Naples, Marco Island, Everglades area (**2017: 2.5 people; 3.0 nights**).

Naples, Marco Island, Everglades: May 2018 Summary

- 6.** Some **50.3%** of Collier's May visitors are in the destination for the first time.
- 7.** Fully **93.6%** consult the web for trip information, with some **78.0%** making bookings for their trip online.
- 8.** The vast majority (**96.4%**) are satisfied with their Collier stay, with **88.1%** planning a future trip to the area.
- 9.** The typical May visitor is **46.3 years of age (2017: 46.7 years)**.

Naples, Marco Island, Everglades: *May 2018 Visitor Profile*

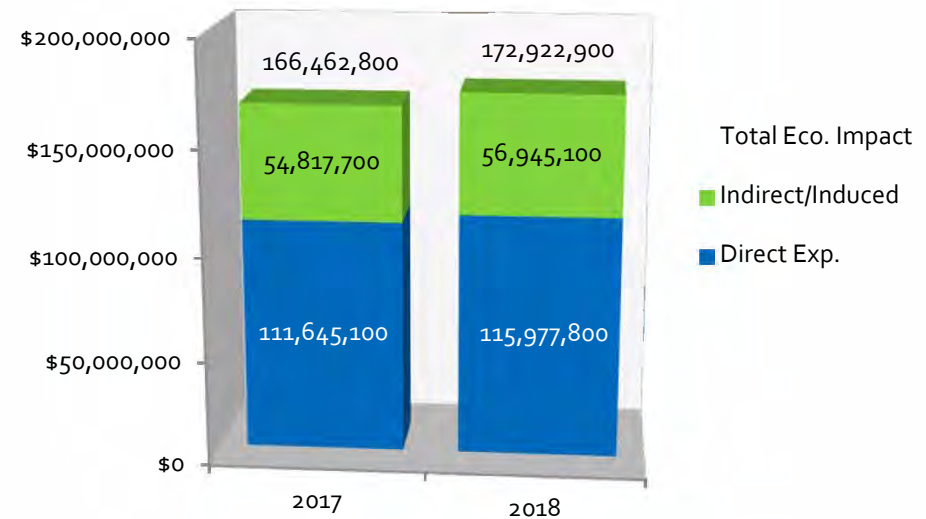
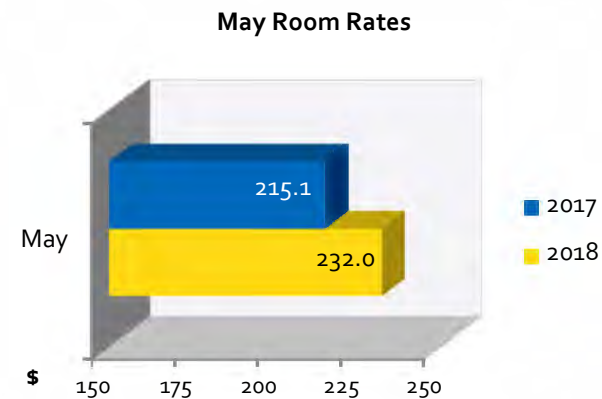
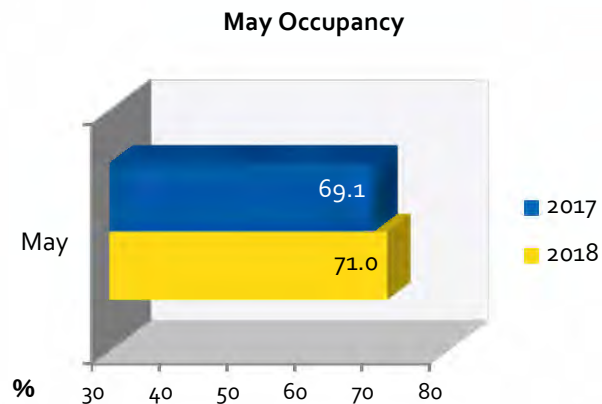


Naples, Marco Island, Everglades Visitor Profile May 2018

H/M/C+ Visitor Statistics	Year to Date (January – May)			May		
	2017	2018	% Δ '17/'18	2017	2018*	% Δ '17/'18
Visitors (#)	887,700	895,800	+0.9	137,200	137,700	+0.4
Room Nights	1,160,800	1,143,300	-1.5	186,600	186,200	-0.2
Direct Exp. (\$)	\$769,074,300	\$799,827,600	+4.0	\$111,645,100	\$115,977,800	+3.9
Total Eco. Impact (\$)	\$1,146,689,800	\$1,192,543,000	+4.0	\$166,462,800	\$172,922,900	+3.9

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

May Economic Impact



May

Lodging Statistics	2017	2018**	% Δ '17/'18
Occupancy	69.1%	71.0%	+2.7
Room Rates	\$215.1	\$232.0	+7.9
RevPAR	\$148.6	\$164.7	+10.8

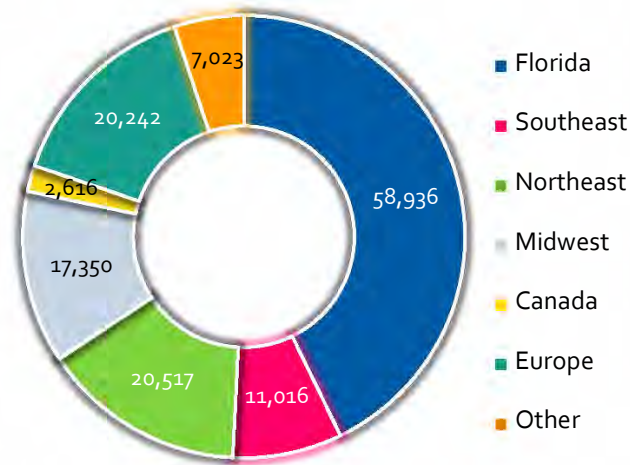
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May 2018 Visitor Origin Markets

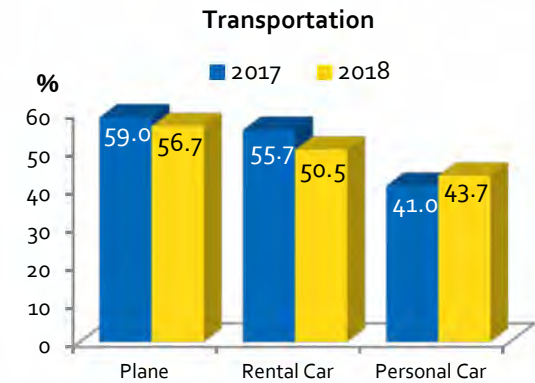
Visitor Origins	2017		2018		% Δ '17/'18
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	41.0%	56,252	42.8%	58,936	+4.8
Southeast	8.3	11,388	8.0	11,016	-3.3
Northeast	14.6	20,031	14.9	20,517	+2.4
Midwest	13.5	18,522	12.6	17,350	-6.3
Canada	2.4	3,293	1.9	2,616	-20.6
Europe	15.4	21,129	14.7	20,242	-4.2
Other	4.8	6,585	5.1	7,023	+6.7
Total	100.0	137,200	100.0	137,700	+0.4

May 2018 Visitor Origins

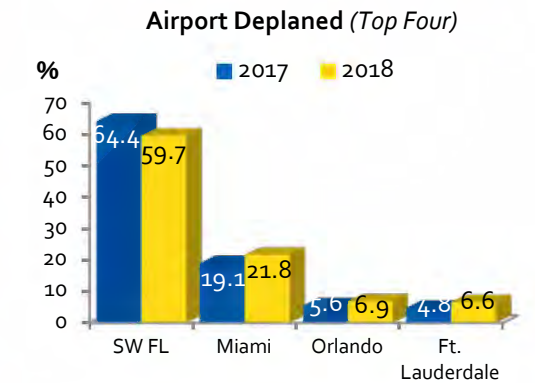


Naples, Marco Island, Everglades Visitor Profile | May 2018

Transportation Mode (Multiple Response)	May 2017	May 2018	
Plane	59.0%	56.7%	↓
Rental Car	55.7	50.5	↓
Personal Car	41.0	43.7	↑

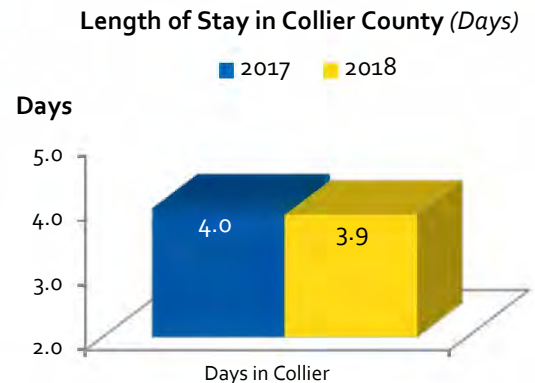


Airport Deplanned (Base: Flew)	May 2017	May 2018	
Southwest Florida International	64.4%	59.7%	↓
Miami International	19.1	21.8	↑
Orlando International/Sanford	5.6	6.9	↑
Ft. Lauderdale International	4.8	6.6	↑
Tampa International	4.4	3.2	↓



Purpose of Trip (Multiple Response)	May 2017	May 2018	
Vacation/Weekend Getaway	83.0%	81.8%	↓
Group Travel	24.2	30.3	↑
Visit with Friends and Relatives	11.0	8.8	↓

First Visit to (% yes)	May 2017	May 2018	
Collier County	48.0%	50.3%	↑
Florida	6.8	7.3	↑



Length of Stay (Days)	May 2017	May 2018	
In Collier County	4.0	3.9	↓

Party Size	May 2017	May 2018	
Number of People	2.5	2.4	↓

Naples, Marco Island, Everglades Visitor Profile | May 2018

Party Composition (Multiple Response)	May 2017	May 2018	
Couple	50.5%	54.2%	↑
Family	38.4	35.8	↓
Single	10.7	11.7	↑
Group of Friends	5.5	3.9	↓

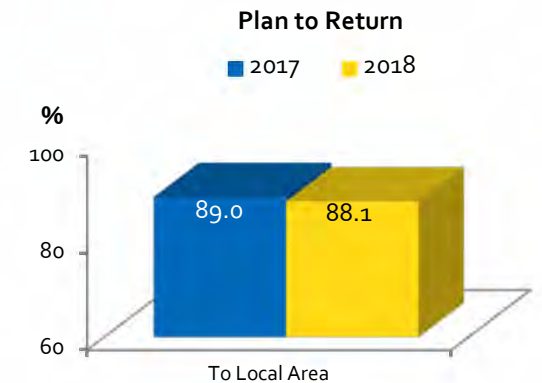
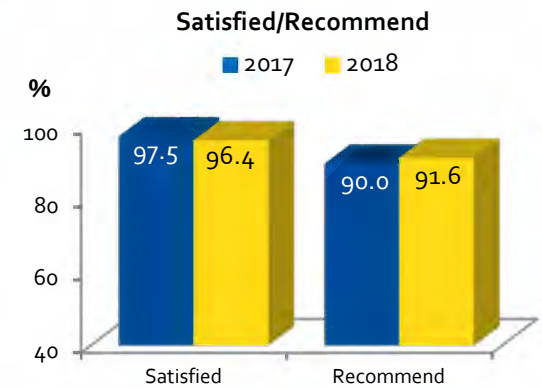
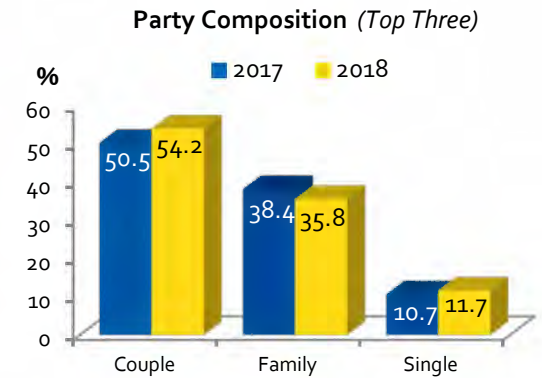
Did Party Have Lodging Reservations for Stay	May 2017	May 2018	
% Yes	91.5%	92.7%	↑

Expense Relative to Expectations	May 2017	May 2018	
More Expensive	14.4%	15.2%	↑
Less Expensive	3.1	2.0	↓
As Expected	75.1	77.2	↑

Satisfaction with Collier County	May 2017	May 2018	
Very Satisfied	84.7%	87.3%	↑
Satisfied	12.8	9.1	↓
Satisfaction Level (Combined)	97.5%	96.4%	↓

Recommend Collier to Friends/Relatives	May 2017	May 2018	
% Yes	90.0%	91.6%	↑

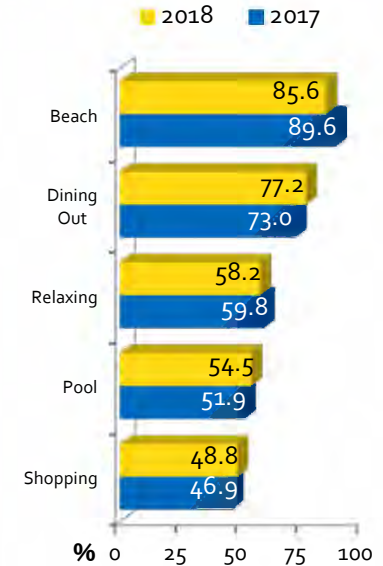
Plan to Return (% Yes)	May 2017	May 2018	
To Local Area	89.0%	88.1%	↓



Naples, Marco Island, Everglades Visitor Profile | May 2018

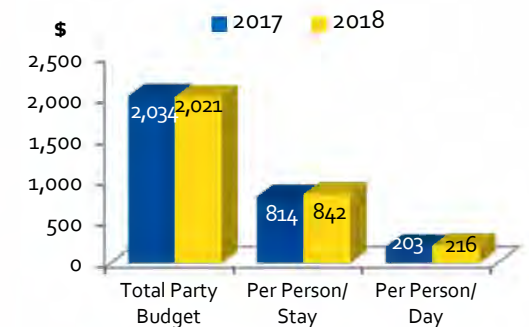
Activities Enjoyed in Area (Multiple Response)	May 2017	May 2018	
Beach	89.6%	85.6%	↓
Dining Out	73.0	77.2	↑
Relaxing	59.8	58.2	↓
Pool	51.9	54.5	↑
Shopping	46.9	48.8	↑
Enjoying Nature/Bird Watching/Everglades	31.3	35.5	↑
Swimming	31.6	32.5	↑
Sunsets	32.9	32.3	↓
Reading	28.2	27.9	↓
Sunning	26.8	27.5	↑
Walking	27.4	25.0	↓
Sightseeing	23.3	21.5	↓
Bars/Nightlife	17.6	20.6	↑
Art Galleries/Shows/Fairs	15.1	15.3	↑
Visiting with Friends/Relatives	13.5	13.0	↓
Golfing	9.2	8.1	↓

Activities Enjoyed in Area (Top Five)



Demographics	May 2017	May 2018	
Average Age Head of Household (Years)	46.7	46.3	↓
Median Annual Household Income	\$142,006	\$141,645	↓

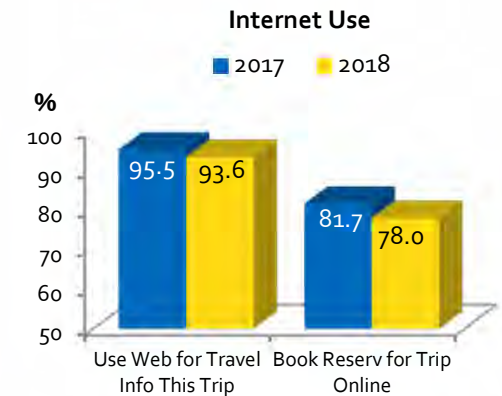
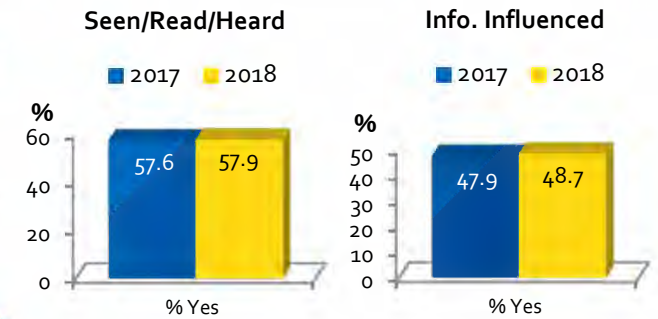
Collier Base Budgets



Collier Base Budget	May 2017	May 2018	
Total	\$2,034.36	\$2,021.39	↓
Per Person/Stay	813.74	842.25	↑
Per Person/Day	203.44	215.96	↑

Naples, Marco Island, Everglades Visitor Profile | May 2018

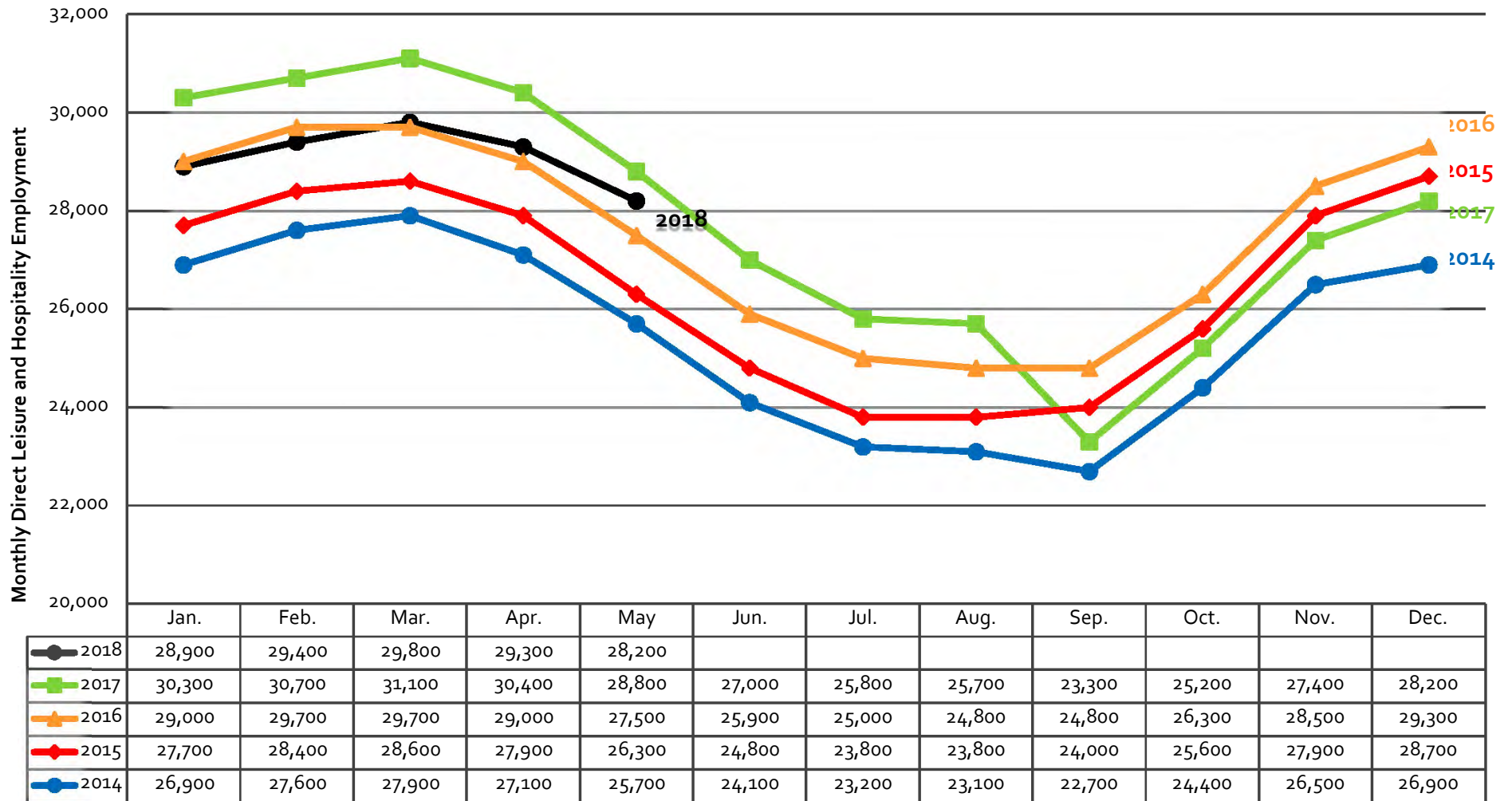
Area Information Seen/Read/Heard	May 2017	May 2018	
% Yes	57.6%	57.9%	↑
Directly Influenced by Information (Base: Seen/Read/Heard Area Information)			
	May 2017	May 2018	
% Yes	47.9%	48.7%	↑
Why Chose the Area (Multiple Response)			
	May 2017	May 2018	
Beach Area	53.8%	52.0%	↓
Weather	45.8	45.3	↓
Relaxing	34.9	33.3	↓
Previous Experience	33.5	32.0	↓
Quiet/Peaceful/Laid Back	30.2	31.8	↑
Restaurants	28.8	29.5	↑
Quality of Accommodations	29.5	28.5	↓
Business/Meeting/Conference	23.8	28.0	↑
Recommendation	29.8	27.7	↓
Outdoor Recreation/Nature	27.3	27.5	↑
Not Crowded	25.7	27.0	↑
Never Been	22.0	23.7	↑
Appealing Brochures/Websites	22.3	21.0	↓
Internet Use			
	May 2017	May 2018	
Use Internet to Obtain Travel Info for This Trip (% Yes)	95.5%	93.6%	↓
Book Reservations for Trip Online (%Yes)	81.7	78.0	↓



Industry Data: *2014-2018*

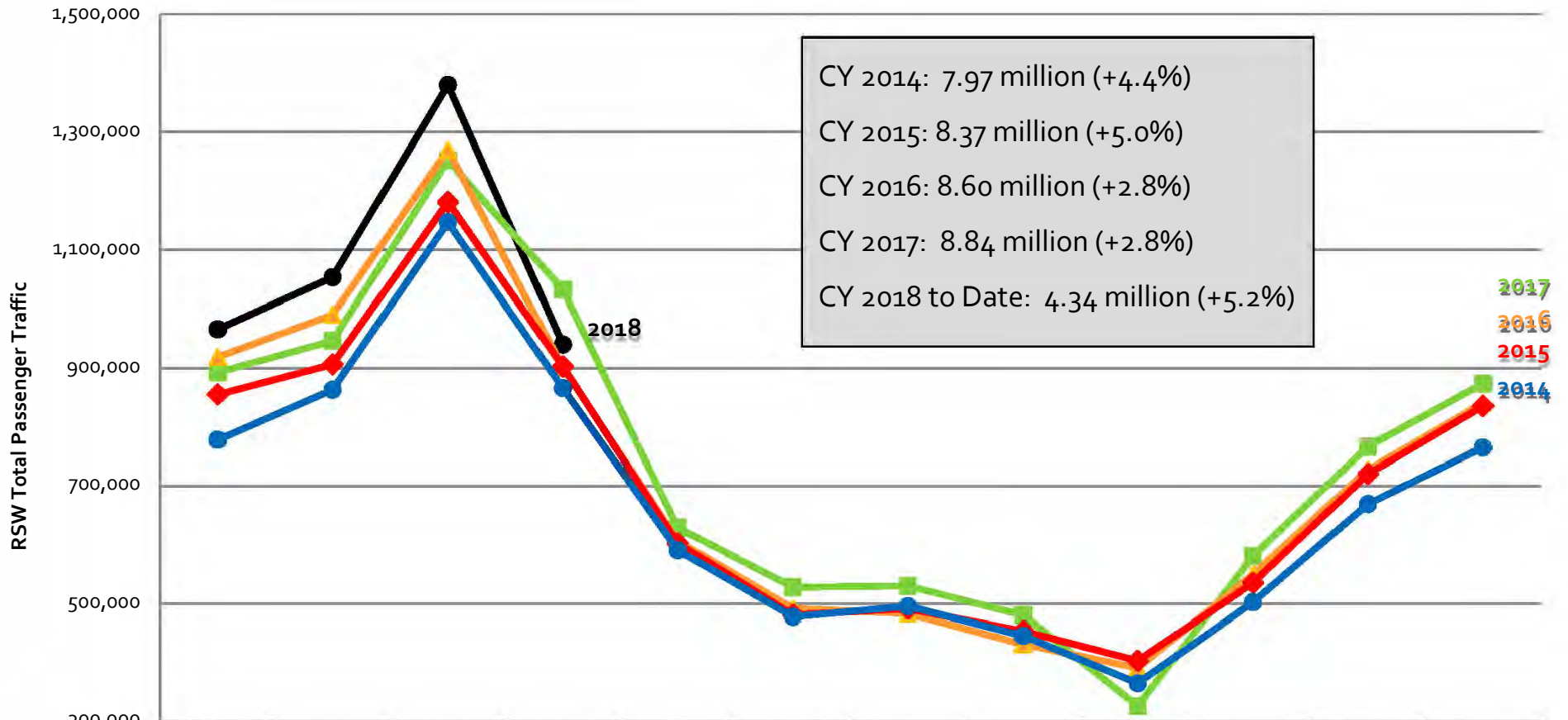


Collier Direct Leisure and Hospitality Employment (Calendar Year) *



* Source: Florida Department of Economic Opportunity/U.S. Department of Labor. Statistics updated for July 2016 through February 2018 as of May 2018 reporting.

Southwest Florida International Airport (RSW) Passenger Traffic



	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
2018	965,981	1,053,817	1,379,728	939,957								
2017	892,905	946,079	1,252,124	1,032,783	629,321	528,383	530,428	481,185	327,466	581,317	767,064	873,494
2016	918,929	989,845	1,269,961	900,594	606,833	492,413	484,074	431,729	391,844	550,316	727,634	840,501
2015	854,953	906,039	1,181,382	902,669	602,891	481,512	492,114	454,360	404,045	535,921	720,556	835,359
2014	778,163	862,899	1,147,059	865,554	591,116	478,692	496,472	446,402	366,038	503,243	669,567	765,288