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Naples, Marco Island, Everglades Convention and Visitors Bureau October 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

November 2018

Naples, Marco Island, Everglades: October 2018 Summary

Executive Summary: October 2018

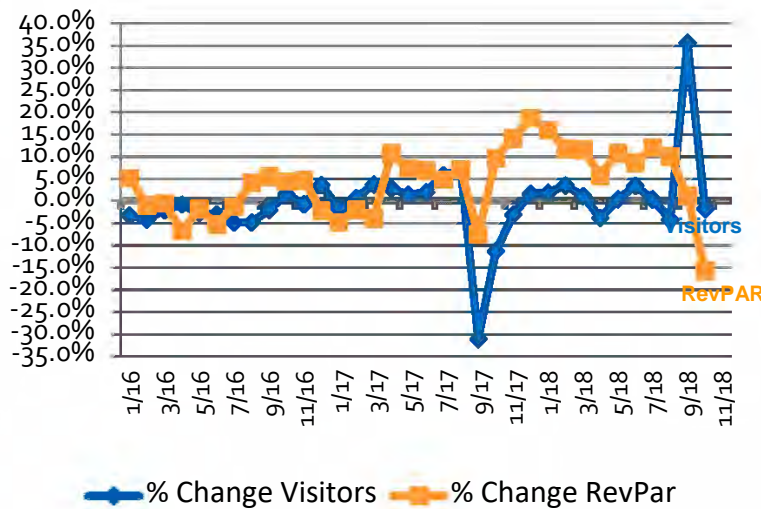
1. This October, some **136,600** visitors stayed in Collier's commercial lodgings **(-1.8%)***. Their visits contributed an estimated **\$122,970,200** of economic impact to the County **(-3.3%)**. Key performance metrics are as follows:

<u>October</u>	<u>2017</u>	<u>2018**</u>	<u>% Δ</u>
Occupancy	79.3%	64.1%	-19.2%
ADR	\$162.5	\$169.4	+4.2%
RevPAR	\$128.9	\$108.6	-15.7%

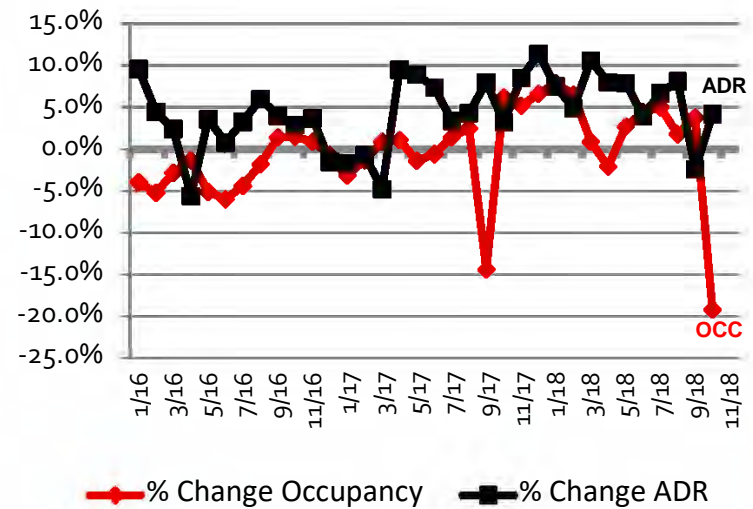
* As of October 2018, approximately 471 Collier lodging units remained closed for renovations. Hurricane Irma made landfall on September 10, 2017.

** Based on units available to be rented. Red Tide significantly impacted October 2018 occupancy levels.

Key Collier Visitation Metrics (%Δ)



Key Collier Visitation Metrics (%Δ)



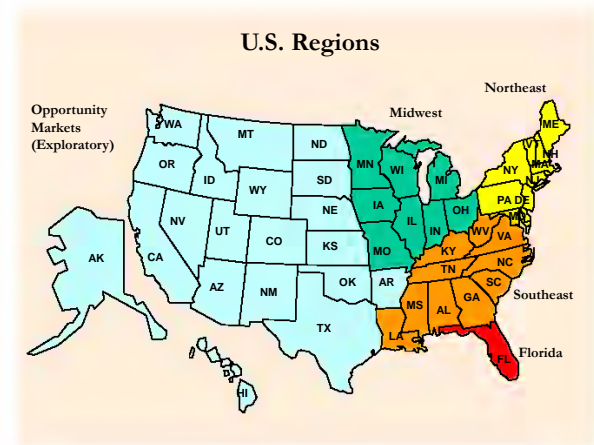
Naples, Marco Island, Everglades: October 2018 Summary

- 2.** Compared to last October, half (**49.7%**) of Collier lodging managers report their three month forward reservations levels as “up” (**2017: 48.1%**).

% of Properties (October)		
<u>Reporting Reservations:</u>	<u>2017</u>	<u>2018</u>
Up	48.1%	49.7 ⁰ %
Same	33.3	25.8
Down	18.5	24.5

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

	2018	
<u>October Visitation</u>	<u>Visitor #</u>	<u>Δ</u>
Florida	56,826	+3.7%
Southeast	7,240	-7.1
Northeast	21,036	+7.3
Midwest	18,441	+2.0
Canada	2,459	-7.0
Europe	24,451	-20.5
Other	6,147	+13.3
Total	136,600	-1.8%



- This October, better than half of the destination's visitor parties flew **(54.0%)**. A majority of these **(61.0%)** deplaned at RSW, with Miami capturing some **20.1%** of deplanements.
- This October, visitor party size averaged **2.5** travelers who stayed for **3.3 nights** in the Naples, Marco Island, Everglades area.

Naples, Marco Island, Everglades: October 2018 Summary

6. Some **38.4%** of Collier's October visitors are in the destination for the first time.
7. Fully **91.4%** consult the web for trip information, with some **89.5%** making bookings for their trip online.
8. Despite the impacts of red tide, the majority (**97.1%**) are satisfied with their Collier stay, with **93.8%** planning a future trip to the area.
9. The typical October visitor is **46.7 years of age**.

Naples, Marco Island, Everglades:

October 2018 Visitor Profile



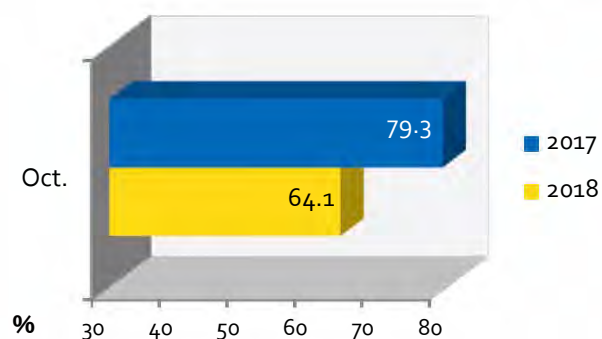
Naples, Marco Island, Everglades Visitor Profile

October 2018

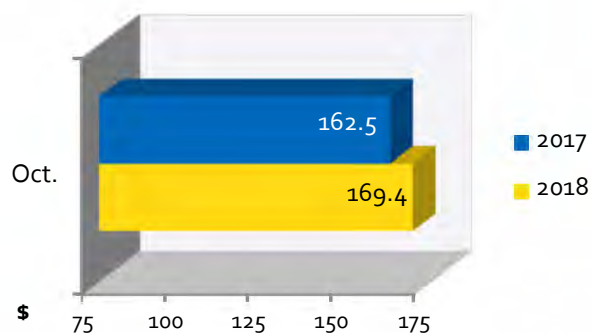
H/M/C+ Visitor Statistics	Year to Date (January – October)			October		
	2017	2018	% Δ '17/'18	2017	2018*	% Δ '17/'18
Visitors (#)	1,477,600	1,506,700	+2.0	139,100	136,600	-1.8
Room Nights	1,990,700	1,993,300	+0.1	181,900	172,100	-5.4
Direct Exp. (\$)	\$1,144,521,100	1,186,745,900	+3.7	\$85,272,500	\$82,475,000	-3.3
Total Eco. Impact (\$)	\$1,706,481,000	\$1,769,438,200	+3.7	\$127,141,300	\$122,970,200	-3.3

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

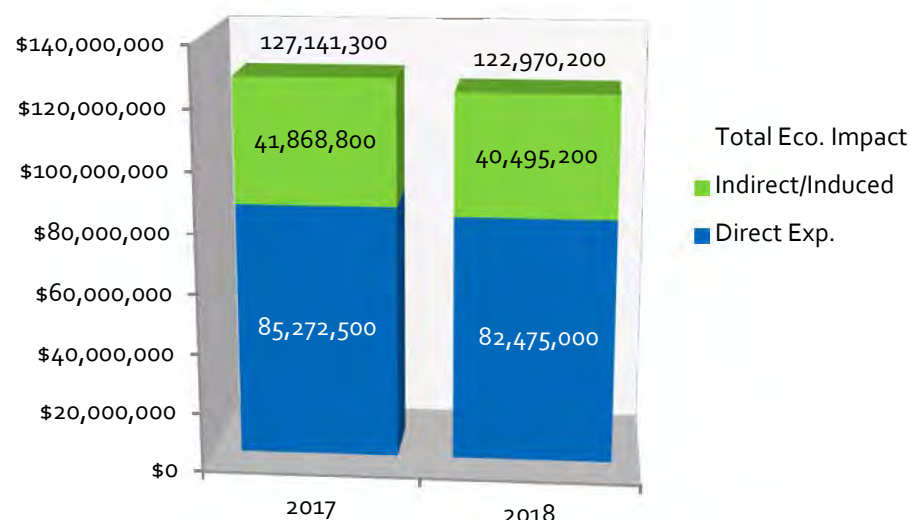
October Occupancy



October Room Rates



October Economic Impact



October

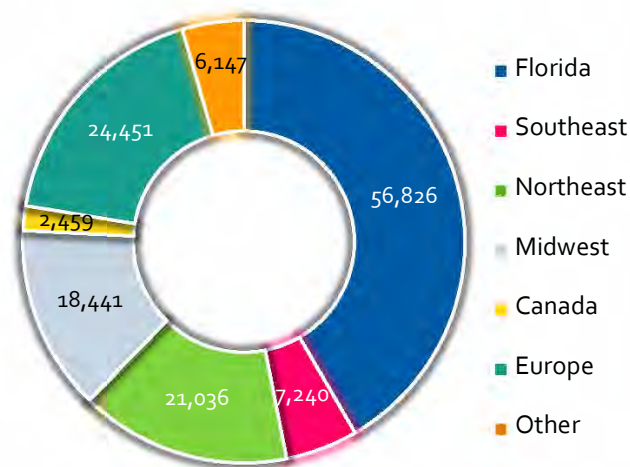
Lodging Statistics	2017	2018**	% Δ '17/'18
Occupancy	79.3%	64.1%	-19.2
Room Rates	\$162.5	\$169.4	+4.2
RevPAR	\$128.9	\$108.6	-15.7

** Note: This October, 471 Collier lodging units remained closed for renovations.
Hurricane Irma made landfall on September 10, 2017.
Red Tide significantly impacted October 2018 occupancy levels.

October 2018 Visitor Origin Markets

Visitor Origins	2017		2018		% Δ '17/'18
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	39.4%	54,805	41.6%	56,826	+3.7
Southeast	5.6	7,790	5.3	7,240	-7.1
Northeast	14.1	19,613	15.4	21,036	+7.3
Midwest	13.0	18,083	13.5	18,441	+2.0
Canada	1.9	2,643	1.8	2,459	-7.0
Europe	22.1	30,741	17.9	24,451	-20.5
Other	3.9	5,425	4.5	6,147	+13.3
Total	100.0	139,100	100.0	136,600	-1.8

October 2018 Visitor Origins



Naples, Marco Island, Everglades Visitor Profile

October 2018

Transportation Mode (Multiple Response)	October 2017	October 2018	
Plane	56.7%	54.0%	↓
Rental Car	54.3	52.0	↓
Personal Car	43.5	45.7	↑

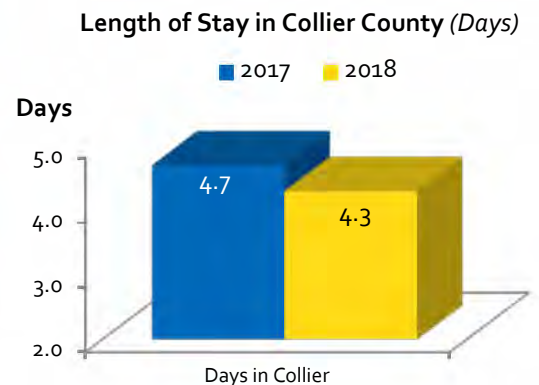
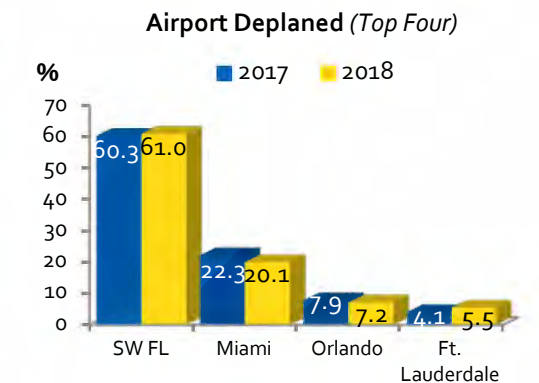
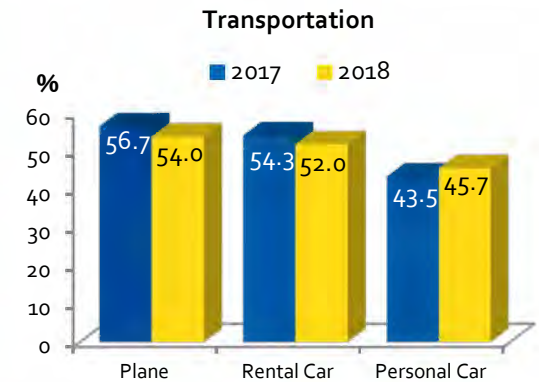
Airport Deplanned (Base: Flew)	October 2017	October 2018	
Southwest Florida International	60.3%	61.0%	↑
Miami International	22.3	20.1	↓
Orlando International/Sanford	7.9	7.2	↓
Ft. Lauderdale International	4.1	5.5	↑
Tampa International	4.7	5.1	↑

Purpose of Trip (Multiple Response)	October 2017	October 2018	
Vacation/Weekend Getaway	69.9%	64.2%	↓
Group Travel	34.4	37.1	↑
Visit with Friends and Relatives	12.8	11.4	↓
Special Event	8.8	6.9	↓

First Visit to (% yes)	October 2017	October 2018	
Collier County	36.2%	38.4%	↑
Florida	5.7	5.0	↓

Length of Stay (Days)	October 2017	October 2018	
In Collier County	4.7	4.3	↓

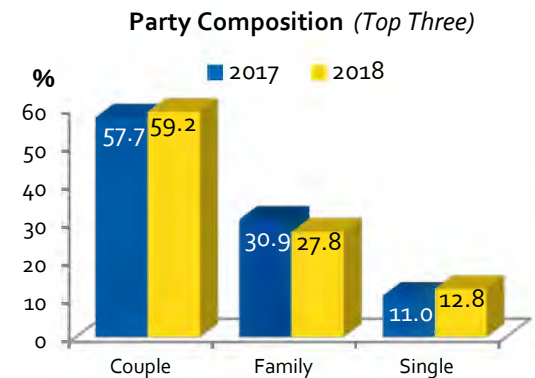
Party Size	October 2017	October 2018	
Number of People	2.6	2.5	↓



Naples, Marco Island, Everglades Visitor Profile | October 2018

Party Composition (Multiple Response)

	October 2017	October 2018	
Couple	57.7%	59.2%	↑
Family	30.9	27.8	↓
Single	11.0	12.8	↑
Group of Friends	7.1	5.6	↓

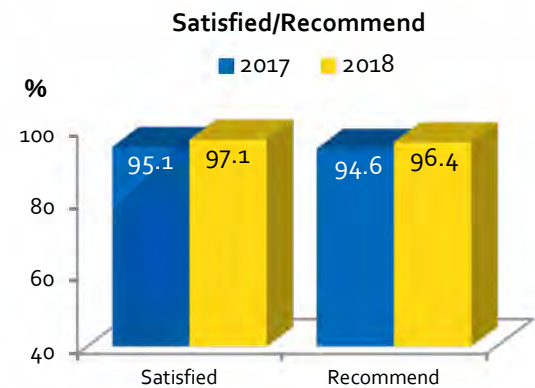


Did Party Have Lodging Reservations for Stay

	October 2017	October 2018	
% Yes	96.2%	95.9%	↓

Expense Relative to Expectations

	October 2017	October 2018	
More Expensive	12.6%	13.6%	↑
Less Expensive	6.2	4.1	↓
As Expected	79.0	76.1	↓



Satisfaction with Collier County

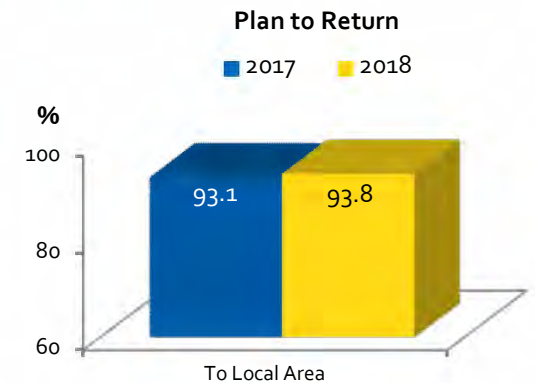
	October 2017	October 2018	
Very Satisfied	93.5%	88.0%	↓
Satisfied	1.6	9.1	↑
Satisfaction Level (Combined)	95.1%	97.1%	↑

Recommend Collier to Friends/Relatives

	October 2017	October 2018	
% Yes	94.6%	96.4%	↑

Plan to Return (% Yes)

	October 2017	October 2018	
To Local Area	93.1%	93.8%	↑



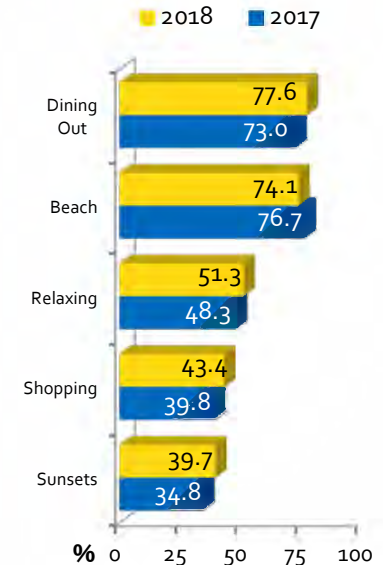
Naples, Marco Island, Everglades Visitor Profile

October 2018

Activities Enjoyed in Area (Multiple Response)

	October 2017	October 2018	
Dining Out	73.0%	77.6%	↑
Beach	76.7	74.1	↓
Relaxing	48.3	51.3	↑
Shopping	38.9	43.4	↑
Sunsets	34.8	39.7	↑
Pool	32.0	34.3	↑
Swimming	28.3	25.8	↓
Walking	16.3	22.5	↑
Enjoying Nature/Bird Watching/Everglades	24.3	21.7	↓
Sightseeing	22.7	21.1	↓
Reading	17.8	20.4	↑
Sunning	21.5	19.3	↓
Bars/Nightlife	17.1	18.4	↑
Art Galleries/Shows/Fairs	13.8	14.8	↑
Visiting with Friends/Relatives	16.9	14.6	↓
Shelling	13.9	11.3	↓
Canoeing/Kayaking	10.3	9.2	↓
Golfing	7.0	5.0	↓
Fishing	6.5	4.7	↓

Activities Enjoyed in Area (Top Five)



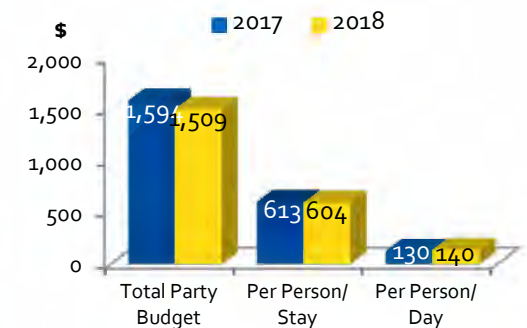
Demographics

	October 2017	October 2018	
Average Age Head of Household (Years)	45.9	46.7	↑
Median Annual Household Income	\$157,336	\$160,044	↑

Collier Base Budget

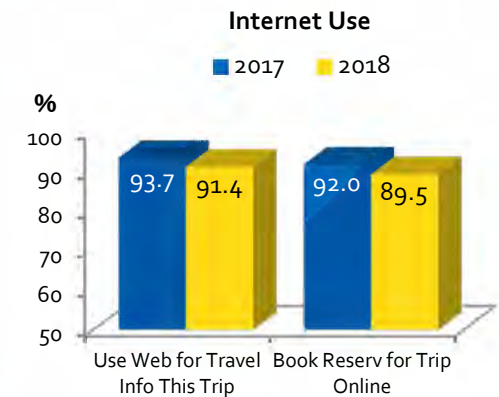
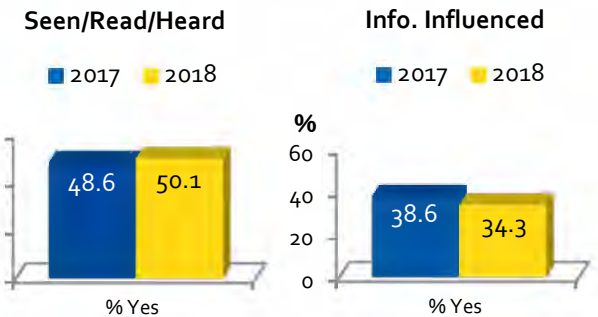
	October 2017	October 2018	
Total	\$1,593.87	\$1,509.43	↓
Per Person/Stay	613.03	603.77	↓
Per Person/Day	130.43	140.41	↑

Collier Base Budgets



Naples, Marco Island, Everglades Visitor Profile | October 2018

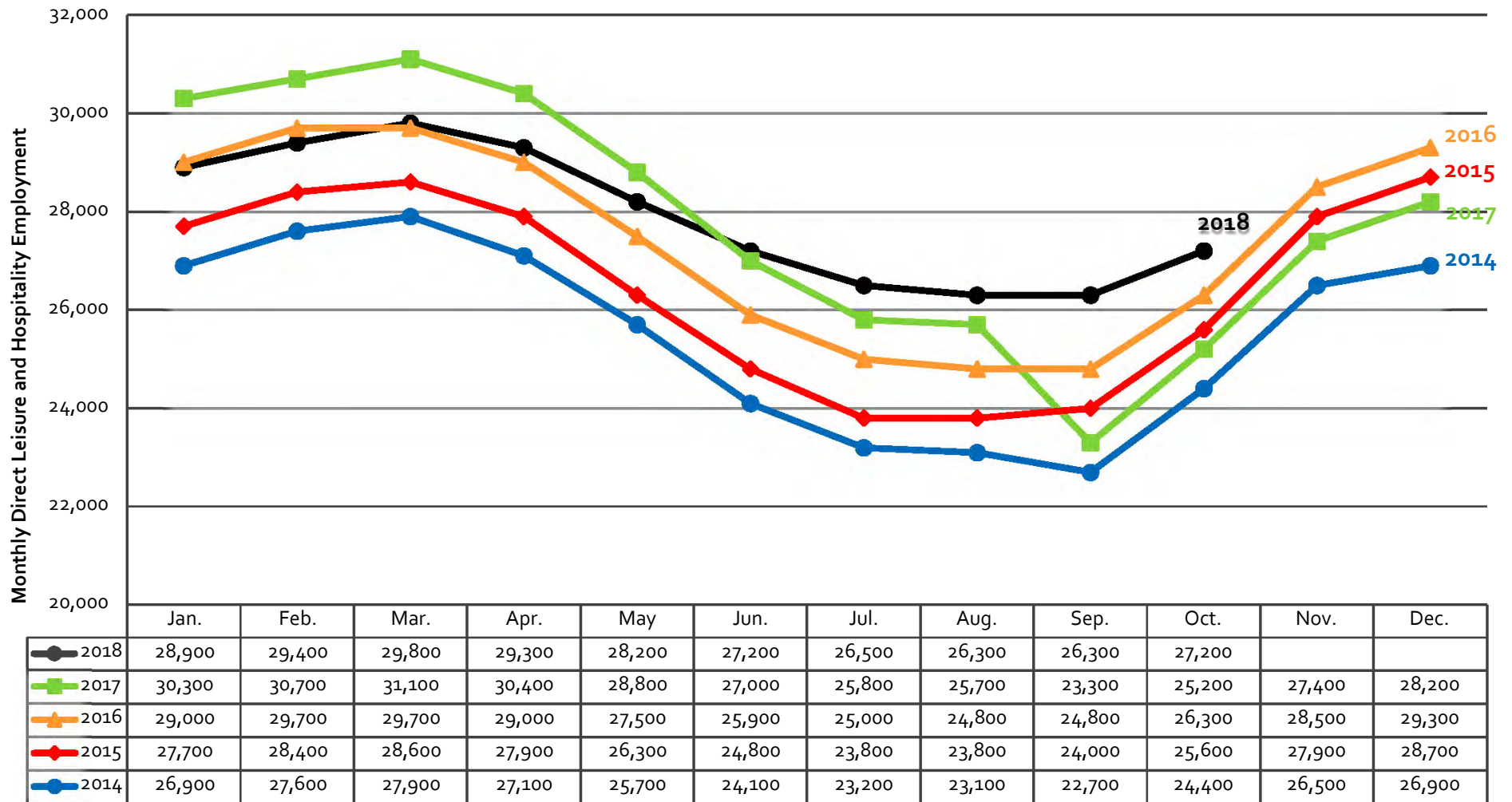
Area Information Seen/Read/Heard	October 2017	October 2018	
% Yes	48.6%	50.1%	↑
Directly Influenced by Information (Base: Seen/Read/Heard Area Information)			
% Yes	38.6%	34.3%	↓
Why Chose the Area (Multiple Response)			
	October 2017	October 2018	
Beach Area	57.0%	54.8%	↓
Quiet/Peaceful/Laid Back	46.0	50.1	↑
Relaxing	47.1	49.7	↑
Previous Experience	41.1	40.4	↓
Weather	34.5	37.6	↑
Business/Meeting/Conference	32.1	35.2	↑
Quality of Accommodations	32.0	33.9	↑
Appealing Brochures/Websites	25.0	32.2	↑
Not Crowded	25.7	28.2	↑
Restaurants	19.6	22.9	↑
Never Been	17.2	20.1	↑
Recommendation	21.9	19.7	↓
Outdoor Recreation/Nature	16.5	13.8	↓
Visiting With Family/Friends	10.6	9.9	↓
Internet Use			
	October 2017	October 2018	
Use Internet to Obtain Travel Info for This Trip (% Yes)	93.7%	91.4%	↓
Book Reservations for Trip Online (%Yes)	92.0	89.5	↓



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

