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Naples, Marco Island, Everglades Convention and Visitors Bureau September 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

October 2018

Naples, Marco Island, Everglades: September 2018 Summary

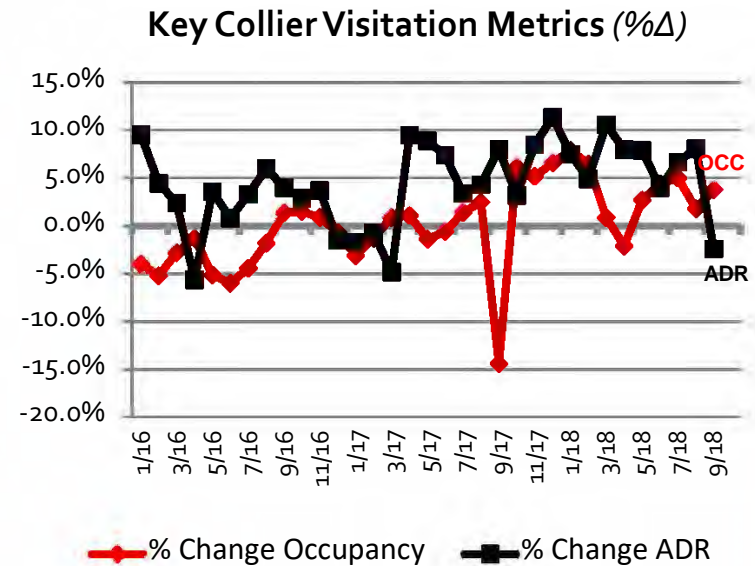
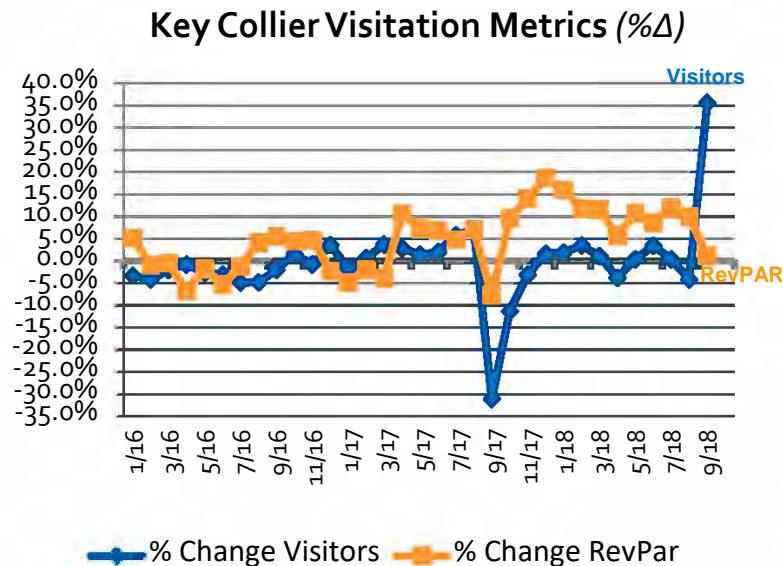
Executive Summary: September 2018

- This September, some **86,100** visitors stayed in Collier's commercial lodgings **(+35.6%)***. Their visits contributed an estimated **\$74,085,300** of economic impact to the County **(+12.2%)**. Key performance metrics are as follows:

<u>September</u>	<u>2017</u>	<u>2018**</u>	<u>% Δ</u>
Occupancy	55.7%	57.8%	+3.8%
ADR	\$136.2	\$132.9	-2.4%
RevPAR	\$75.9	\$76.8	+1.2%

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

** Based on units available to be rented.



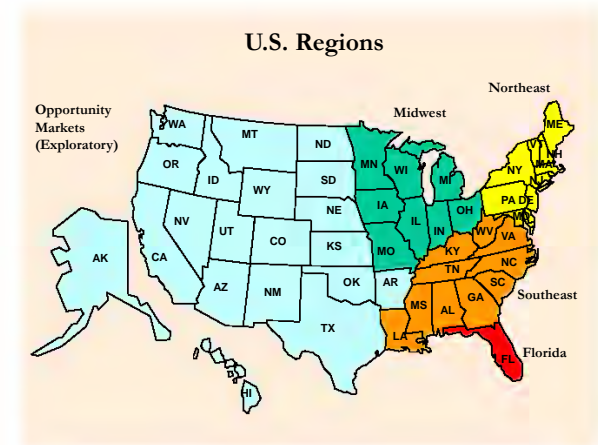
Naples, Marco Island, Everglades: September 2018 Summary

2. Compared to last September, two in five (**39.3%**) Collier lodging managers report their three month forward reservations levels as “up” (**2017: 20.7%**).

% of Properties (September)			
Reporting Reservations:			
	2017	2018	
Up	20.7%	39.3%	
Same	36.0	20.3	
Down	43.4	40.4	

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

September Visitation	2018 Visitor #	Δ
Florida	38,487	+22.2%
Southeast	5,855	+48.7
Northeast	11,107	+44.9
Midwest	7,060	+66.0
Canada	1,205	+137.2
Europe	17,306	+48.9
Other	5,080	+27.0
Total	86,100	+35.6%



4. This September, better than half of the destination’s visitor parties flew (**2018: 53.7%**). A majority of these (**57.0%**) deplaned at RSW, with Miami capturing some **24.8%** of deplanements.
5. This September, visitor party size averaged **2.3** travelers who stayed for **3.4 nights** in the Naples, Marco Island, Everglades area (**September 2017: 2.5 people; 4.7 nights**).

Naples, Marco Island, Everglades: September 2018 Summary

6. Some **43.5%** of Collier's September visitors are in the destination for the first time.
7. Fully **95.3%** consult the web for trip information, with some **84.5%** making bookings for their trip online.
8. Despite the impacts of red tide, the majority (**90.0%**) are satisfied with their Collier stay, with **86.0%** planning a future trip to the area.
9. The typical September visitor is **46.4 years of age**.

Naples, Marco Island, Everglades:

September 2018 Visitor Profile

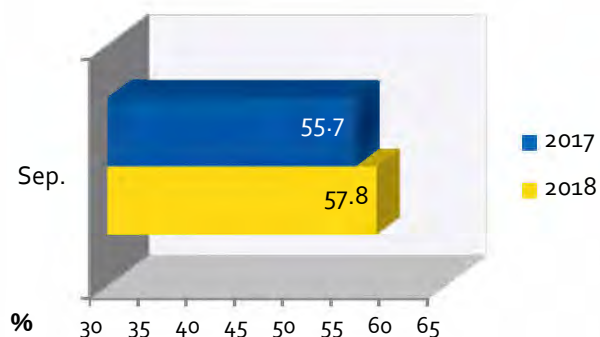


Naples, Marco Island, Everglades Visitor Profile | September 2018

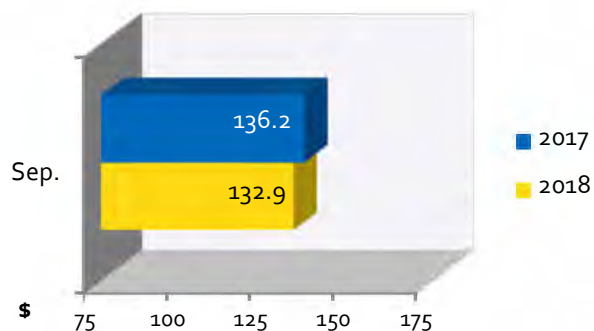
H/M/C+ Visitor Statistics	Year to Date (January – September)			September		
	2017	2018	% Δ '17/'18	2017	2018*	% Δ '17/'18
Visitors (#)	1,338,500	1,370,100	+2.4	63,500	86,100	+35.6
Room Nights	1,808,800	1,821,200	+0.7	130,700	161,100	+23.3
Direct Exp. (\$)	\$1,059,248,600	\$1,104,270,900	+4.3	\$44,284,900	\$49,688,300	+12.2
Total Eco. Impact (\$)	\$1,579,339,700	\$1,646,468,000	+4.3	\$66,028,800	\$74,085,300	+12.2

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

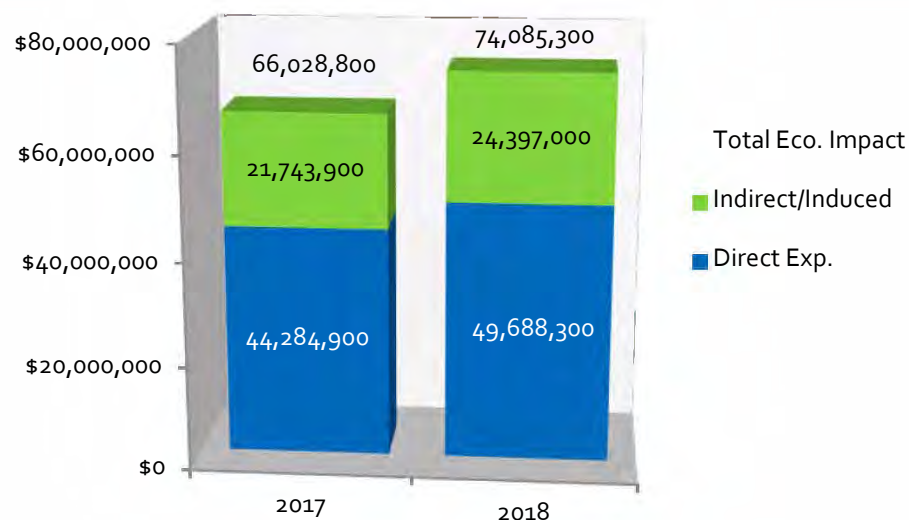
September Occupancy



September Room Rates



September Economic Impact



September

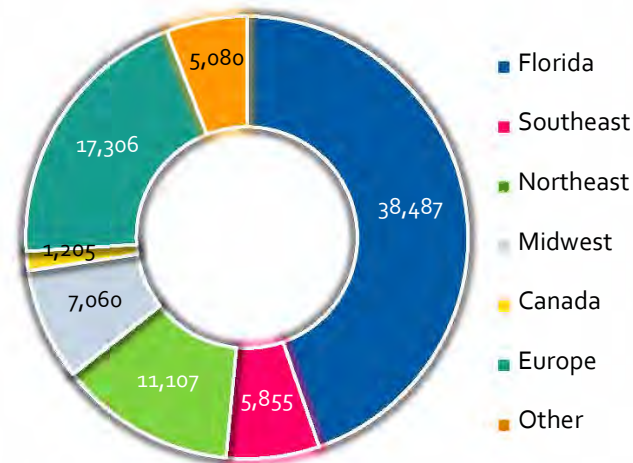
Lodging Statistics	2017	2018**	% Δ '17/'18
Occupancy	55.7%	57.8%	+3.8
Room Rates	\$136.2	\$132.9	-2.4
RevPAR	\$75.9	\$76.8	+1.2

** Note: This September, 471 Collier lodging units were closed for renovations. Hurricane Irma made landfall on September 10, 2017.

September 2018 Visitor Origin Markets

Visitor Origins	2017		2018		% Δ '17/'18
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	49.6%	31,496	44.7%	38,487	+22.2
Southeast	6.2	3,937	6.8	5,855	+48.7
Northeast	12.1	7,684	12.9	11,107	+44.5
Midwest	6.7	4,254	8.2	7,060	+66.0
Canada	0.8	508	1.4	1,205	+137.2
Europe	18.3	11,621	20.1	17,306	+48.9
Other	6.3	4,000	5.9	5,080	+27.0
Total	100.0	63,500	100.0	86,100	+35.6

September 2018 Visitor Origins



Naples, Marco Island, Everglades Visitor Profile

September 2018

Transportation Mode (Multiple Response)	September 2016	September 2018	
Plane	51.5%	53.7%	↑
Rental Car	49.4	51.5	↑
Personal Car	47.5	46.3	↓

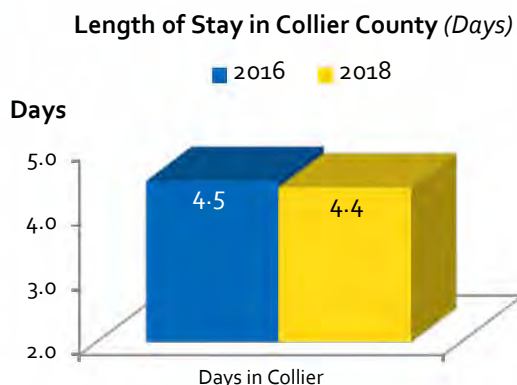
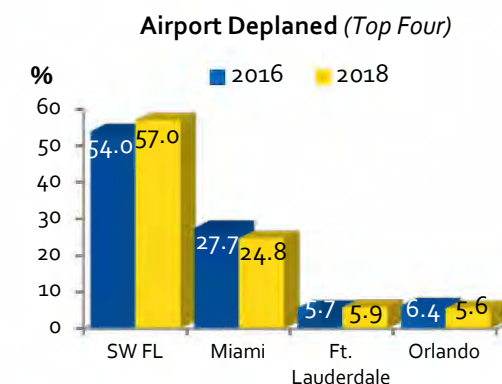
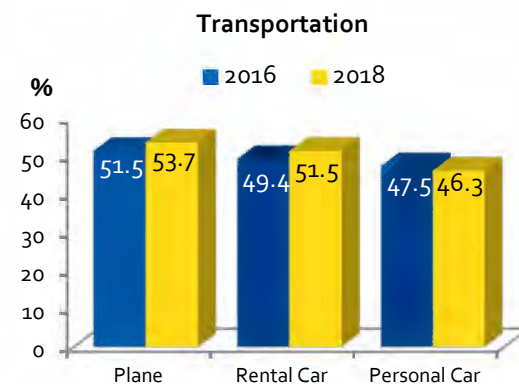
Airport Deplaned (Base: Flew)	September 2016	September 2018	
Southwest Florida International	54.0%	57.0%	↑
Miami International	27.7	24.8	↓
Ft. Lauderdale International	5.7	5.9	↑
Orlando International/Sanford	6.4	5.6	↓
Tampa International	2.8	2.4	↑

Purpose of Trip (Multiple Response)	September 2016	September 2018	
Vacation/Weekend Getaway	75.6%	73.8%	↓
Group Travel	21.3	23.8	↑
Visit with Friends and Relatives	8.5	11.2	↑
Special Event	10.2	7.7	↓
Wedding/Honeymoon	3.8	2.2	↓

First Visit to (% yes)	September 2016	September 2018	
Collier County	40.7%	43.5%	↑
Florida	7.9	9.3	↑

Length of Stay (Days)	September 2016	September 2018	
In Collier County	4.5	4.4	↓

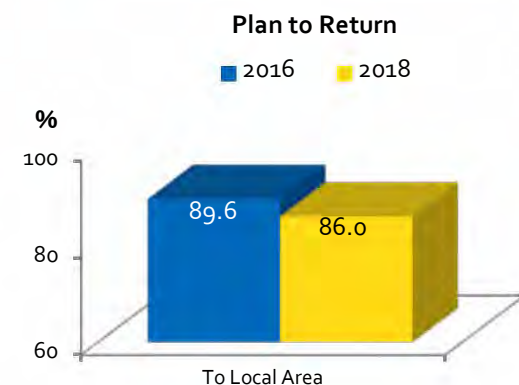
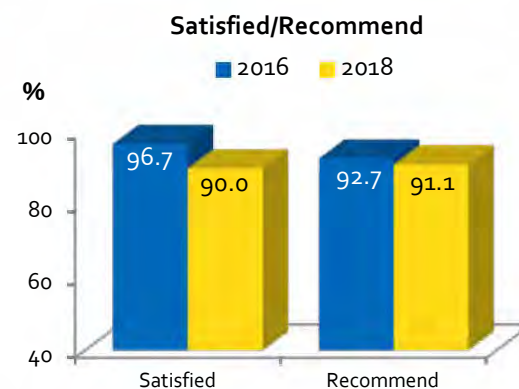
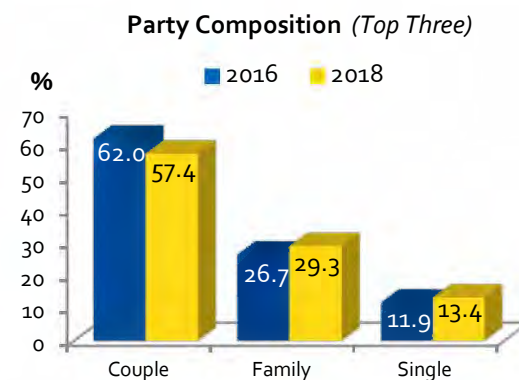
Party Size	September 2016	September 2018	
Number of People	2.4	2.3	↓



* Please Note: Due to impacts of Hurricane Irma only limited profile statistics are available for September 2017 and for this report profile comparisons are made to September 2016.

Naples, Marco Island, Everglades Visitor Profile | September 2018

Party Composition (Multiple Response)	September 2016	September 2018	
Couple	62.0%	57.4%	↓
Family	26.7	29.3	↑
Single	11.9	13.4	↑
Group of Friends	7.3	8.2	↑
Did Party Have Lodging Reservations for Stay	September 2016	September 2018	
% Yes	90.1%	93.4%	↑
Expense Relative to Expectations	September 2016	September 2018	
More Expensive	21.4%	17.9%	↓
Less Expensive	3.8	5.7	↑
As Expected	66.0	64.1	↓
Satisfaction with Collier County	September 2016	September 2018	
Very Satisfied	83.7%	81.8%	↓
Satisfied	13.0	8.2	↓
Satisfaction Level (Combined)	96.7%	90.0%	↓
Recommend Collier to Friends/Relatives	September 2016	September 2018	
% Yes	92.7%	91.1%	↓
Plan to Return (% Yes)	September 2016	September 2018	
To Local Area	89.6%	86.0%	↓

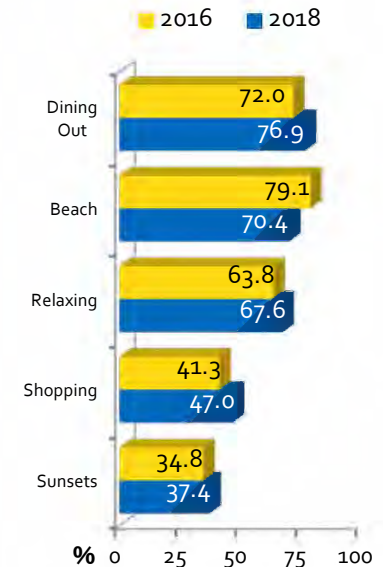


Naples, Marco Island, Everglades Visitor Profile

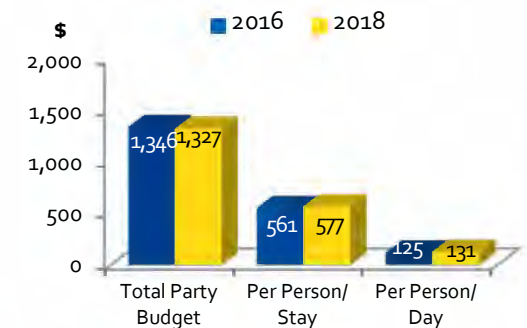
September 2018

Activities Enjoyed in Area (Multiple Response)	September 2016	September 2018	
Dining Out	72.0%	76.9%	↑
Beach	79.1	70.4	↓
Relaxing	63.8	67.6	↑
Shopping	41.3	47.0	↑
Sunsets	34.8	37.4	↑
Pool	32.5	36.2	↑
Sightseeing	32.1	30.9	↓
Enjoying Nature/Bird Watching/Everglades	30.1	26.8	↓
Walking	17.6	21.0	↑
Swimming	25.2	20.1	↓
Reading	17.9	19.4	↑
Shelling	25.3	18.9	↓
Sunning	20.1	15.4	↓
Bars/Nightlife	16.0	14.0	↓
Visiting with Friends/Relatives	9.5	11.5	↑
Boating	13.3	9.3	↓
Art Galleries/Shows/Fairs	10.4	9.0	↓
Golfing	9.0	7.6	↓
Fishing	7.6	5.9	↓
Demographics			
	September 2016	September 2018	
Average Age Head of Household (Years)	46.7	46.4	↓
Median Annual Household Income	\$145,433	\$149,253	↑
Collier Base Budget			
	September 2016	September 2018	
Total	\$1,345.64	\$1,327.33	↓
Per Person/Stay	560.68	577.10	↑
Per Person/Day	124.60	131.16	↑

Activities Enjoyed in Area (Top Five)



Collier Base Budgets



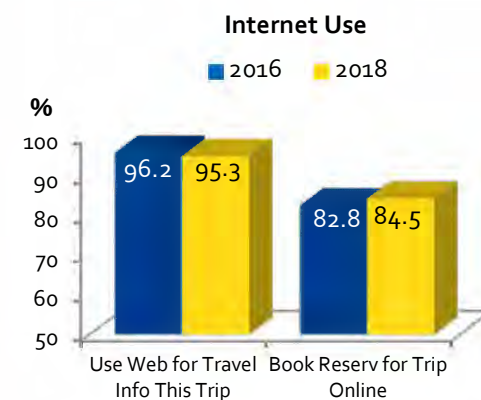
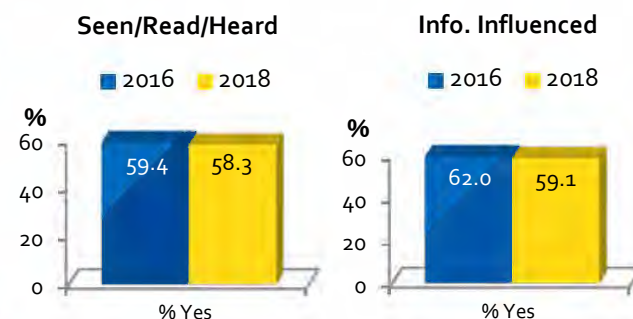
Naples, Marco Island, Everglades Visitor Profile | September 2018

Area Information Seen/Read/Heard	September 2016	September 2018
% Yes	59.4%	58.3% ↓

Directly Influenced by Information (Base: Seen/Read/Heard Area Information)	September 2016	September 2018
% Yes	62.0%	59.1% ↓

Why Chose the Area (Multiple Response)	September 2016	September 2018
Beach Area	59.5%	53.1% ↓
Relaxing	46.1	46.9 ↑
Quiet/Peaceful/Laid Back	35.6	40.0 ↑
Quality of Accommodations	31.7	39.5 ↑
Weather	35.9	38.5 ↑
Previous Experience	38.6	37.7 ↓
Not Crowded	34.3	28.8 ↓
Business/Meeting/Conference	23.8	25.2 ↑
Never Been	24.9	24.2 ↓
Outdoor Recreation/Nature	25.5	23.1 ↓
Recommendation	21.9	21.2 ↓
Restaurants	23.2	19.2 ↓
Appealing Brochures/Websites	19.8	17.7 ↓

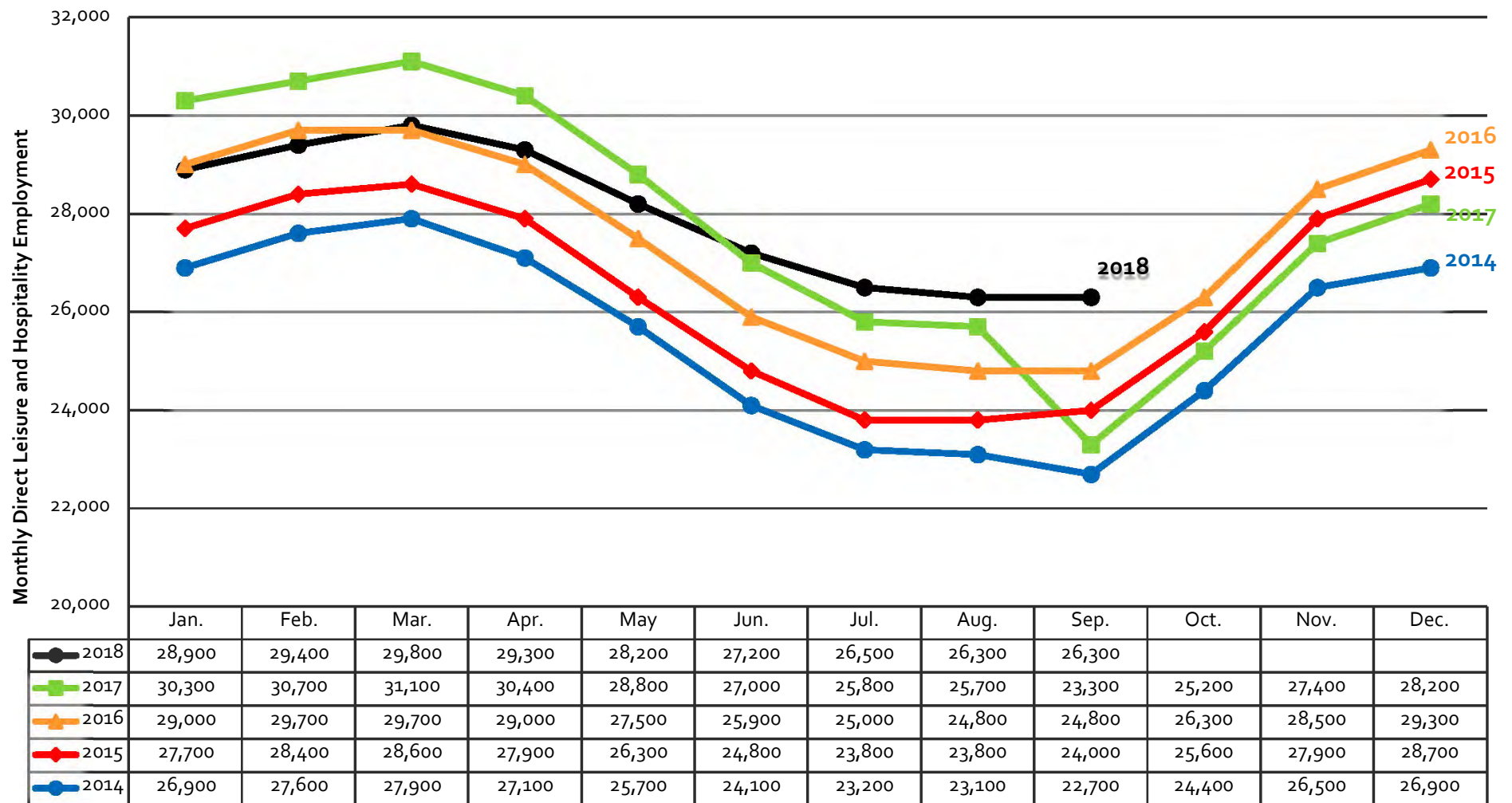
Internet Use	September 2016	September 2018
Use Internet to Obtain Travel Info for This Trip (% Yes)	96.2%	95.3% ↓
Book Reservations for Trip Online (%Yes)	82.8	84.5 ↑



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

