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**Naples, Marco Island, Everglades Convention and Visitors Bureau
January 2017 Visitor Profile**

Prepared for:

Collier County Board of County Commissioners
and

Naples, Marco Island, Everglades Convention and Visitors Bureau

Prepared by:

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February 2017

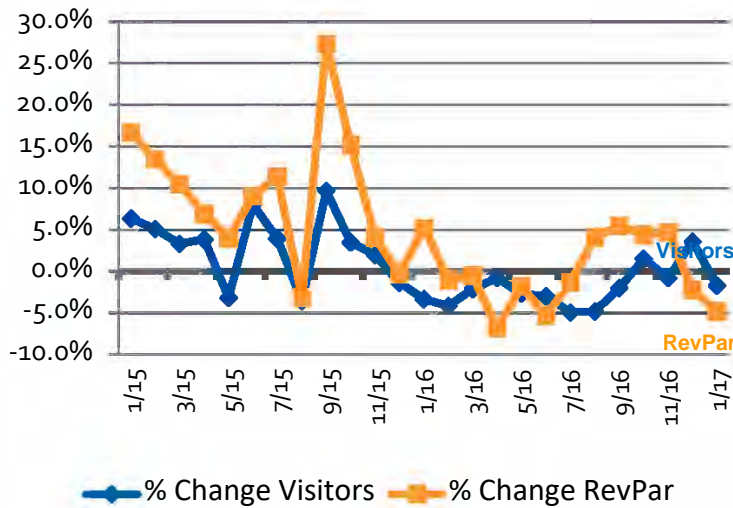
Naples, Marco Island, Everglades: January 2017 Summary

Executive Summary: January 2017

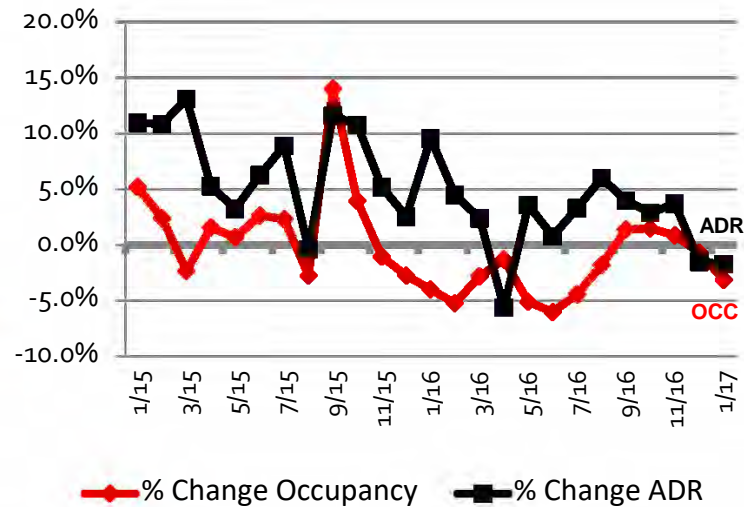
- This January, some **182,600** visitors stayed in Collier's commercial lodgings (-1.7%). Their visits contributed an estimated **\$171,829,300** of economic impact to the County (-2.2%). Key performance metrics are as follows:

	<u>January</u>	<u>2016</u>	<u>2017</u>	<u>% Δ</u>
Occupancy		79.8%	77.3%	-3.1%
ADR		\$235.0	\$230.9	-1.7%
RevPAR		\$187.5	\$178.5	-4.8%

Key Collier Visitation Metrics (%Δ)



Key Collier Visitation Metrics (%Δ)



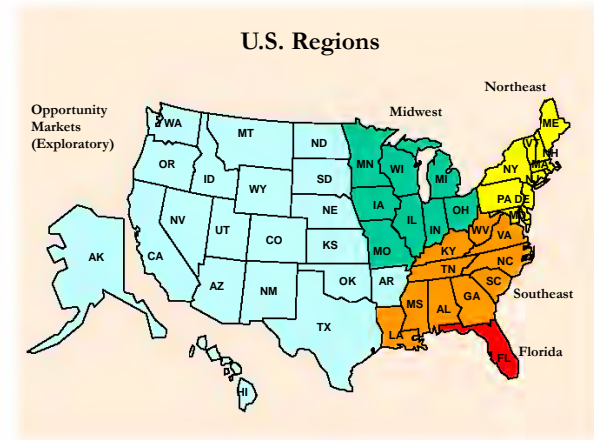
- Compared to last January, four out of every five (**80.2%**) lodging managers report their three month forward reservations levels as "up" or the "same":

<u>% of Properties (January)</u>	<u>2016</u>	<u>2017</u>
<u>Reporting Reservations:</u>		
Up	34.7%	27.5%
Same	38.6	52.7
Down	24.4	19.8

Naples, Marco Island, Everglades: January 2017 Summary

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

<u>January Visitation</u>	<u>2017 Visitor #</u>	<u>Δ</u>
Florida	54,597	+0.7%
Southeast	10,226	-12.6
Northeast	49,850	+1.7
Midwest	32,138	-7.0
Canada	3,469	-25.3
Europe	24,468	+2.9
West	7,852	+0.7
Total	182,600	-1.7%



- This January, six out of every ten of the destination's patrons flew (**2016: 67.7%; 2017: 64.4%**). A majority of these (**67.1%**) deplaned at RSW, with Miami capturing some **15.1%** of deplanements.
- The typical January visitor party includes an average of **2.3** travelers who stay for **3.2** nights in the Naples, Marco Island, Everglades area.
- Some **41.1%** of Collier's January visitors are in the destination for the first time (**2016: 37.9%**).
- Fully **93.5%** consulted the web for trip information, with some **76.0%** making bookings for their trip online.
- The vast majority (**95.5%**) are satisfied with their Collier stay, with **92.2%** planning a future trip to the area (**2016: 91.4%**).
- This year, January visitors average **51.4** years of age (**2016: 52.2 years of age**).

Naples, Marco Island, Everglades: *January 2017 Visitor Profile*

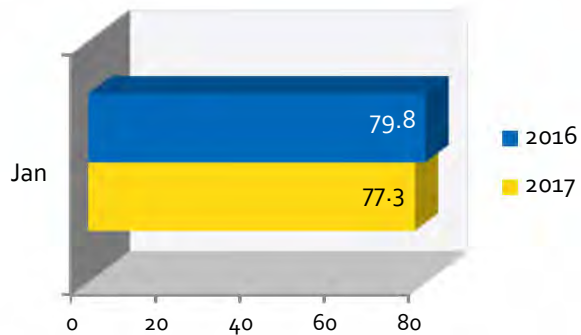


Naples, Marco Island, Everglades Visitor Profile | January 2017

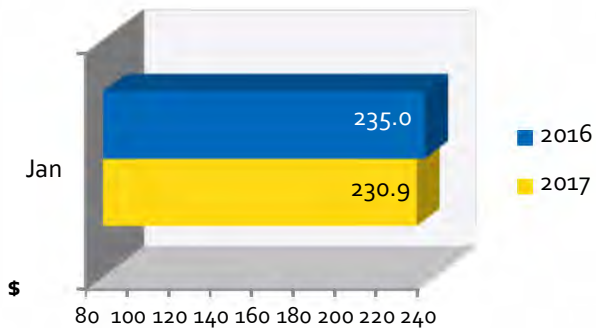
H/M/C* Visitor Statistics	Calendar Year (Jan. – Dec.)			January		% Δ '16/'17
	2015	2016	% Δ '15/'16	2016	2017**	
Visitors (#)	1,829,500	1,793,700	-2.0	185,700	182,600	-1.7
Room Nights	2,512,400	2,429,700	-3.3	240,100	229,400	-4.5
Direct Exp. (\$)	\$1,311,630,200	\$1,328,627,700	+1.3	\$117,891,600	\$115,244,300	-2.2
Total Eco. Impact (\$)	\$1,955,640,500	\$1,980,983,900	+1.3	\$175,776,400	\$171,829,300	-2.2

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

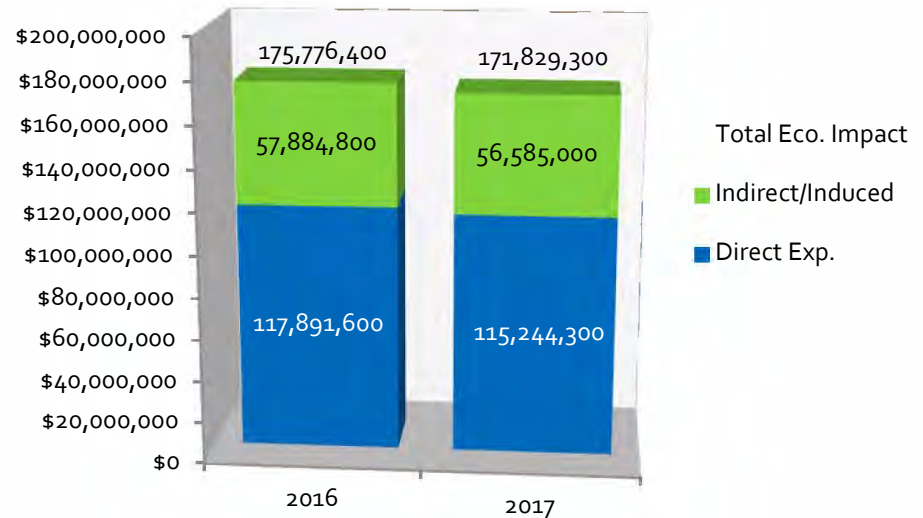
January Occupancy



January Room Rates



January Economic Impact



January

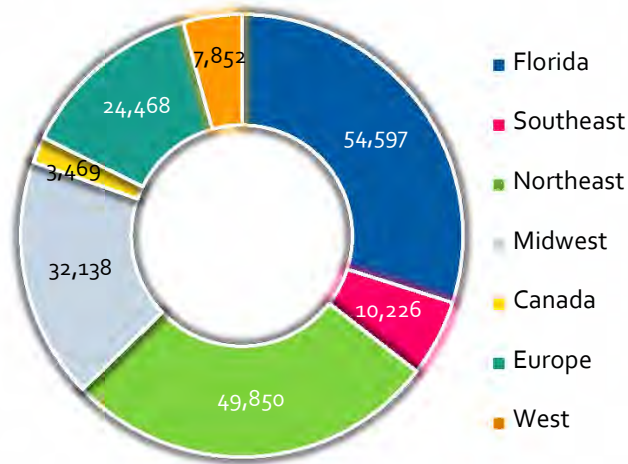
Lodging Statistics	2016	2017**	% Δ '16/'17
Occupancy	79.8%	77.3%	-3.1
Room Rates	\$235.0	\$230.9	-1.7
RevPAR	\$187.5	\$178.5	-4.8

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

January 2017 Visitor Origin Markets

Visitor Origins	2016		2017		% Δ '16/'17
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	29.2%	54,224	29.9%	54,597	+0.7
Southeast	6.3	11,699	5.6	10,226	-12.6
Northeast	26.4	49,025	27.3	49,850	+1.7
Midwest	18.6	34,540	17.6	32,138	-7.0
Canada	2.5	4,643	1.9	3,469	-25.3
Europe	12.8	23,770	13.4	24,468	+2.9
West	4.2	7,799	4.3	7,852	+0.7
Total	100.0	185,700	100.0	182,600	-1.7

January 2017 Visitor Origins



Naples, Marco Island, Everglades Visitor Profile | January 2017

Transportation Mode (Multiple Response)	January 2016	January 2017
Plane	67.7%	64.4%
Rental Car	62.6	61.1
Personal Car	32.3	35.4

Airport Deplaned (Base: Flew)	January 2016	January 2017
Southwest Florida International	66.4%	67.1%
Miami International	14.0	15.1
Ft. Lauderdale International	6.5	6.9
Orlando International/Sanford	5.8	5.2
Tampa International	3.4	3.7

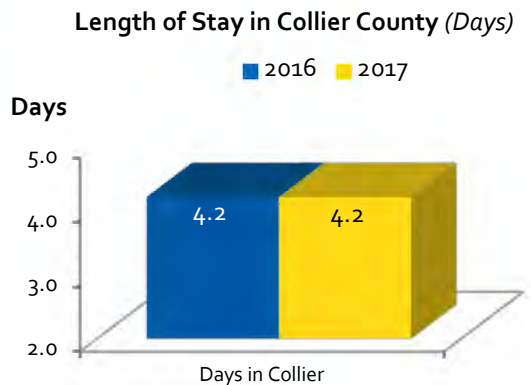
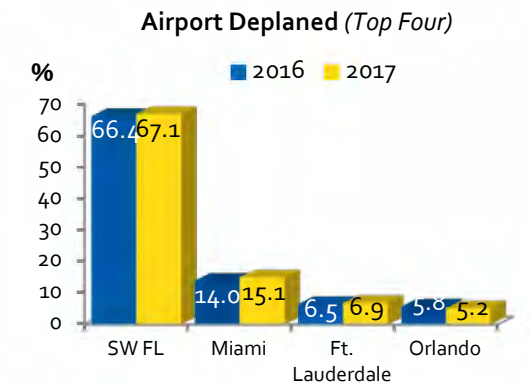
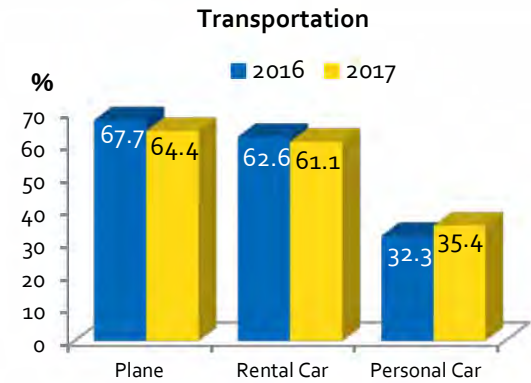
Purpose of Trip (Multiple Response)	January 2016	January 2017
Vacation/Weekend Getaway	73.3%	76.2%
Group Travel	37.2	35.5
Visit with Friends and Relatives	11.0	13.8
Special Event	6.7	8.0

First Visit to (% yes)	January 2016	January 2017
Collier County	37.9%	41.1%
Florida	5.1	6.5

Length of Stay (Days)	January 2016	January 2017
In Collier County	4.2	4.2

Party Size	January 2016	January 2017
Number of People	2.2	2.3

Party Composition (Multiple Response)	January 2016	January 2017
Couple	60.1%	62.2%
Family	17.6	20.0
Single	14.2	12.7
Extended Family	4.6	5.6
Group of Couples	5.9	4.4
Business Associates	4.1	3.5
Group of Friends	3.8	3.3



Naples, Marco Island, Everglades Visitor Profile | January 2017

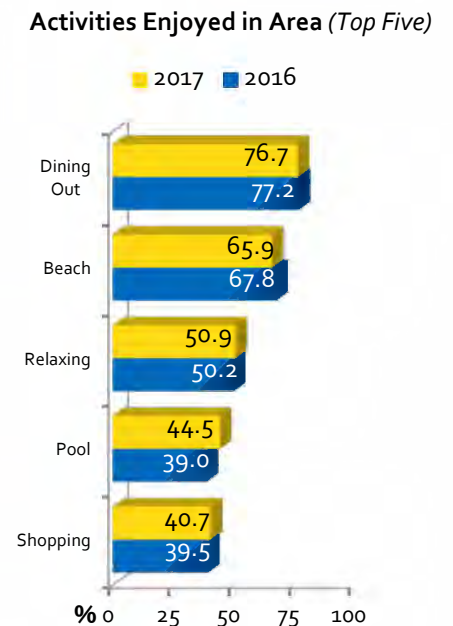
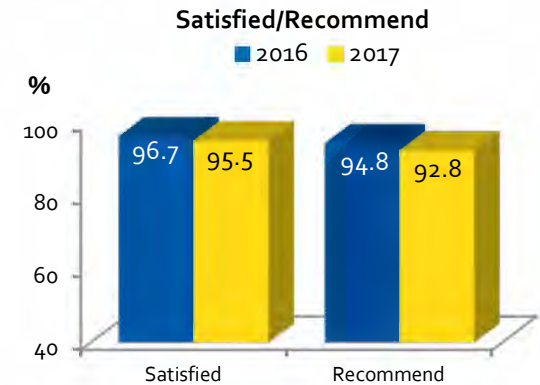
Did Party Have Lodging Reservations for Stay	January 2016	January 2017
% Yes	94.9%	92.8%

Satisfaction with Collier County	January 2016	January 2017
Very Satisfied	91.7%	93.1%
Satisfied	5.0	2.4
Satisfaction Level (Combined)	96.7%	95.5%

Activities Enjoyed in Area (Multiple Response)	January 2016	January 2017
Dining Out	77.2%	76.7%
Beach	67.8	65.9
Relaxing	50.2	50.9
Pool	39.0	44.5
Shopping	39.5	40.7
Sunsets	22.8	26.4
Enjoying Nature/Bird Watching/Everglades	23.3	25.8
Visiting with Friends/Relatives	22.8	24.4
Sunning	21.1	23.8
Walking	26.3	22.6
Reading	20.1	22.2
Sightseeing	19.2	19.7
Art Galleries/Shows/Fairs	14.4	16.8
Bars/Nightlife	11.1	15.6
Museums	13.1	15.4
Swimming	15.7	14.2
Golfing	11.5	11.0

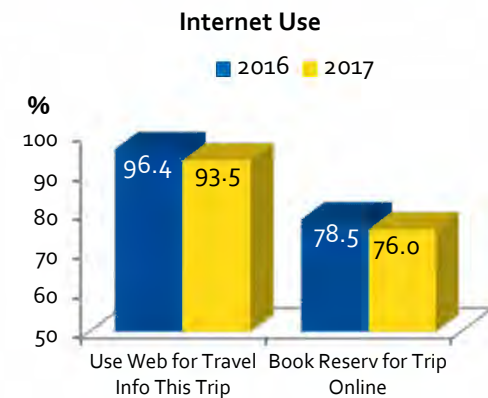
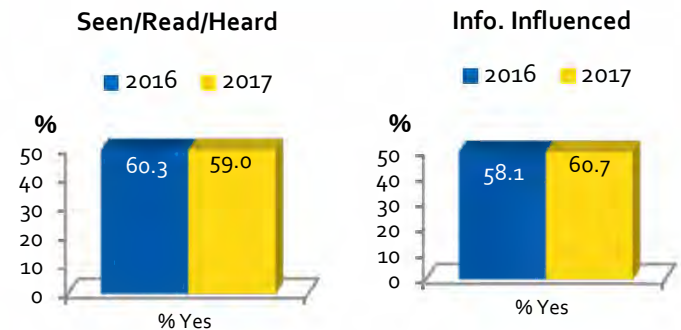
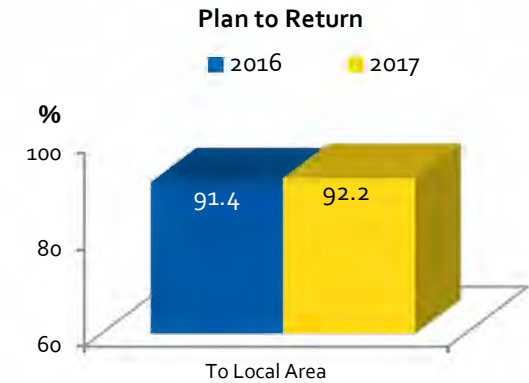
Expense Relative to Expectations	January 2016	January 2017
More Expensive	19.9%	21.0%
Less Expensive	2.5	1.4
As Expected	71.6	69.8

Demographics	January 2016	January 2017
Average Age Head of Household (Years)	52.2	51.4
Median Annual Household Income	\$155,007	\$153,915



Naples, Marco Island, Everglades Visitor Profile | January 2017

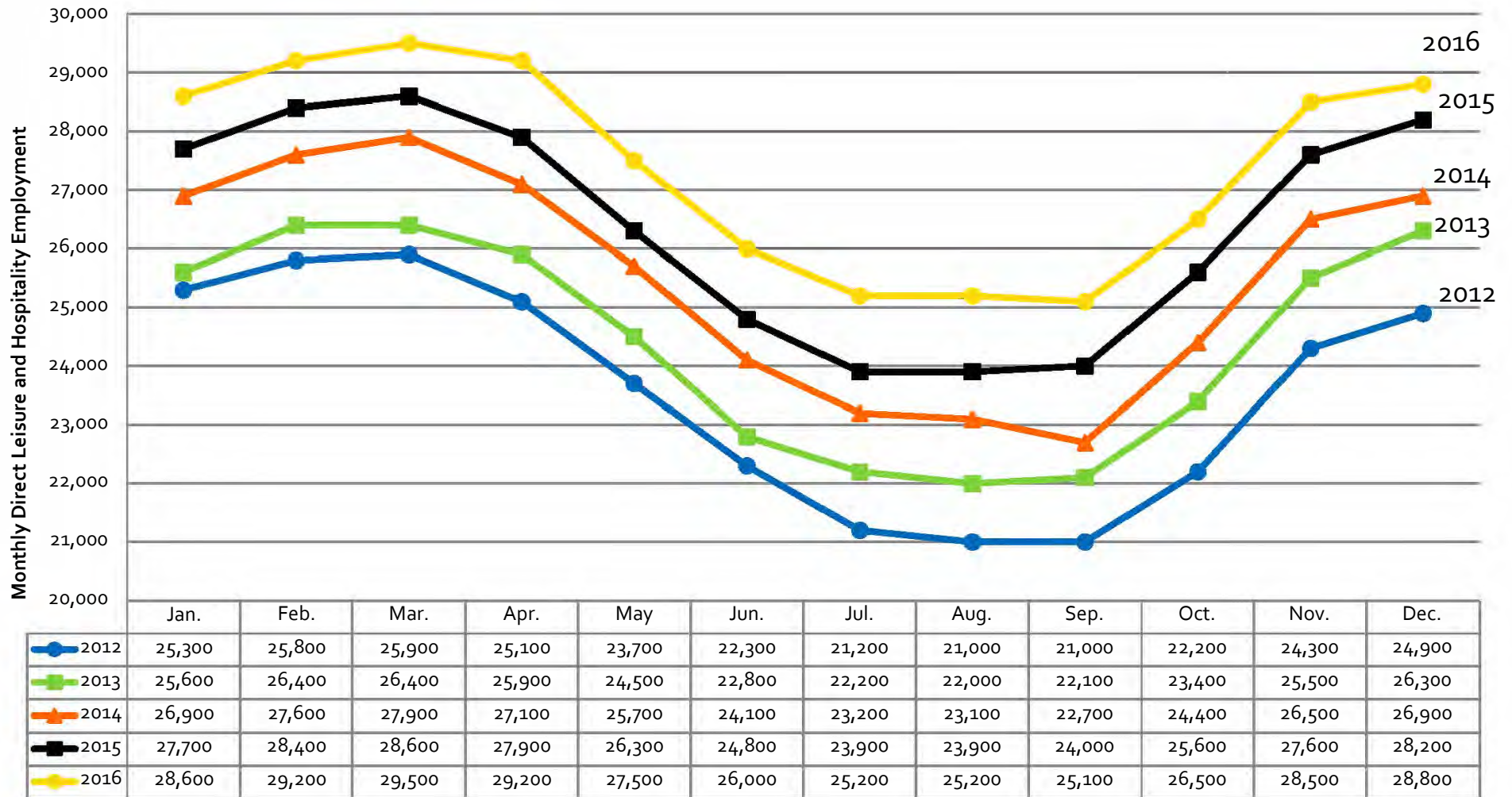
Recommend Collier to Friends/Relatives	January 2016	January 2017
% Yes	94.8%	92.8%
Plan to Return (% Yes)	January 2016	January 2017
To Local Area	91.4%	92.2%
Collier Base Budget	January 2016	January 2017
Total	\$1,396.67	\$1,451.59
Per Person/Stay	634.85	631.13
Per Person/Day	151.15	150.27
Area Information Seen/Read/Heard	January 2016	January 2017
% Yes	60.3%	59.0%
Directly Influenced by Information (Base: Seen/Read/Heard Area Information)	January 2016	January 2017
% Yes	58.1%	60.7%
Why Chose the Area (Multiple Response)	January 2016	January 2017
Beach Area	59.5%	56.0%
Weather	57.0	54.3
Quiet/Peaceful/Laid Back	32.9	36.7
Business/Meeting/Conference	36.1	33.4
Relaxing	33.9	32.2
Outdoor Recreation/Nature	30.4	32.2
Previous Experience	32.5	31.6
Never Been	27.8	30.1
Not Crowded	34.4	28.1
Restaurants	24.9	25.2
Recommendation	25.1	24.7
Appealing Brochures/Websites	25.3	24.4
Quality of Accommodations	24.1	22.8
Internet Use	January 2016	January 2017
Use Internet to Obtain Travel Info for This Trip (% Yes)	96.4%	93.5%
Book Reservations for Trip Online (%Yes)	78.5	76.0



Industry Data: *2012-2016*



Collier Direct Leisure and Hospitality Employment (Calendar Year) *



* Source: Florida Department of Economic Opportunity.

Southwest Florida International Airport (RSW) Passenger Traffic

