

Charlotte County 2016 Summer Tourism

Presented to:

Charlotte Harbor

Visitor and Convention Bureau

Research Data Services, Inc.

December 2016

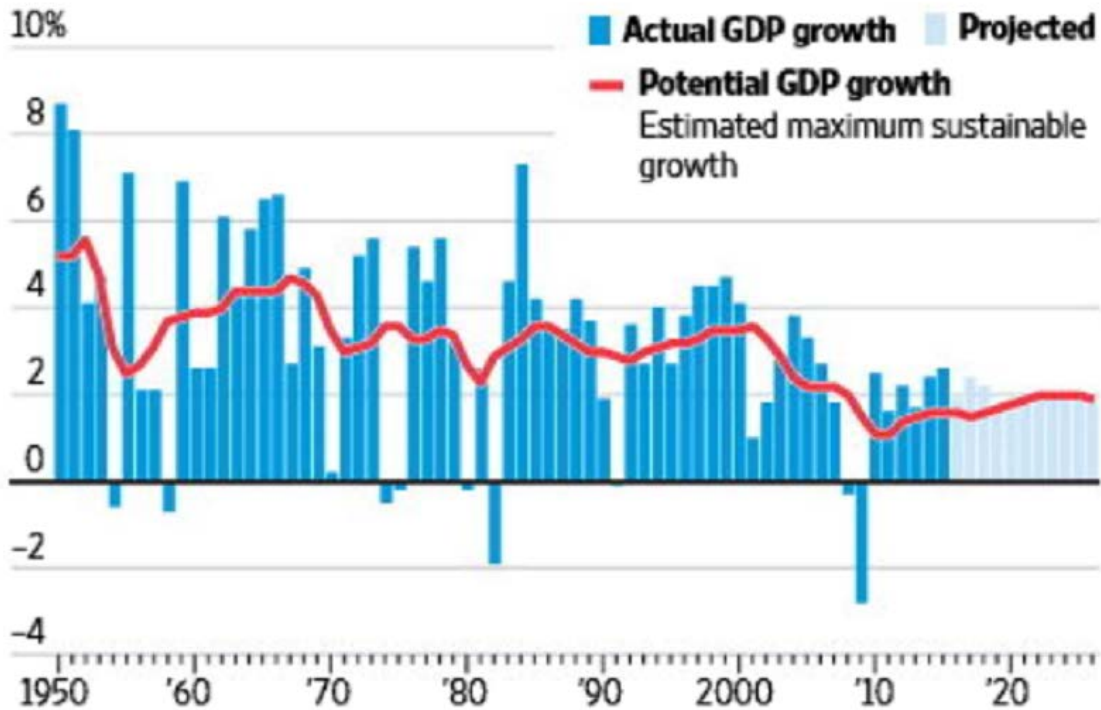


Economic Indicators

Potentially Slowing GDP Growth

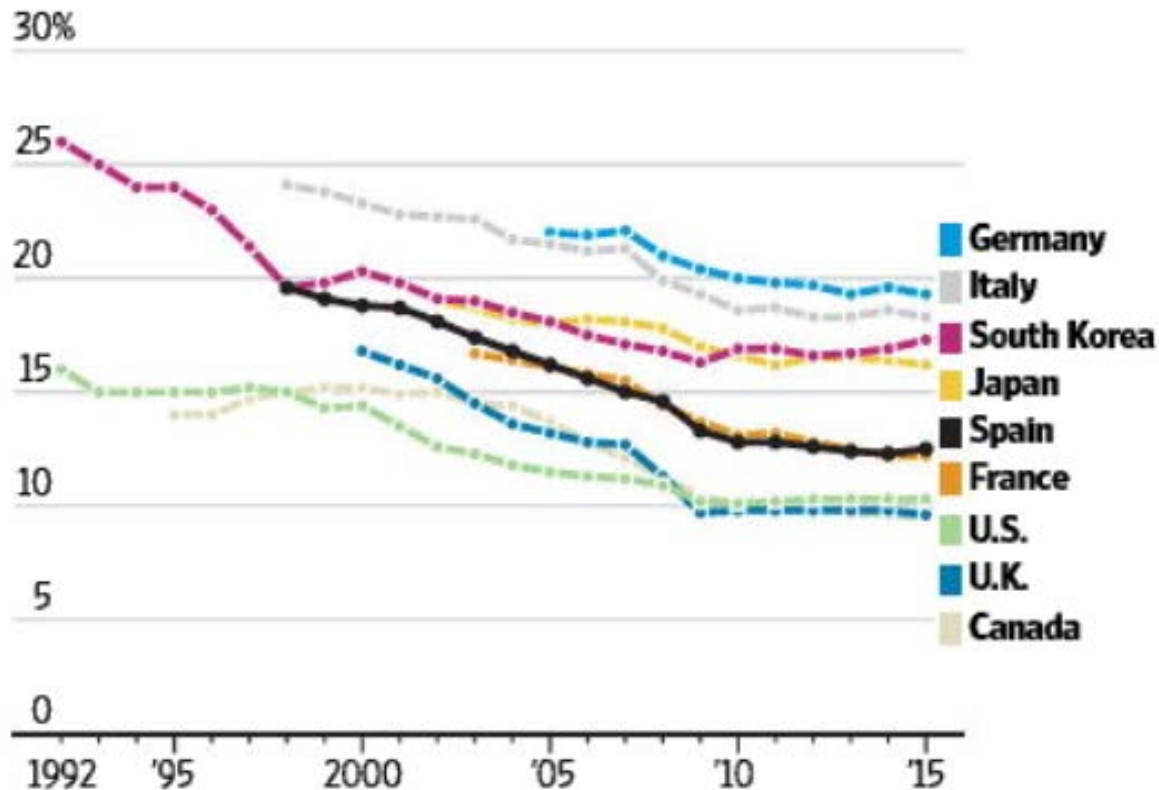
Reduced Speed Ahead

Government forecasters think the underlying growth trend for the U.S. economy has slowed due to subdued productivity gains and slower expansion of the workforce.



Decline of the Factory Worker

Manufacturing's share of total employment has been shrinking in most advanced economies. Factory employment as a percentage of total for nine selected countries:



Dollars per Euro

How many dollars one euro buys

\$140

135

130

125

120

115

110

105

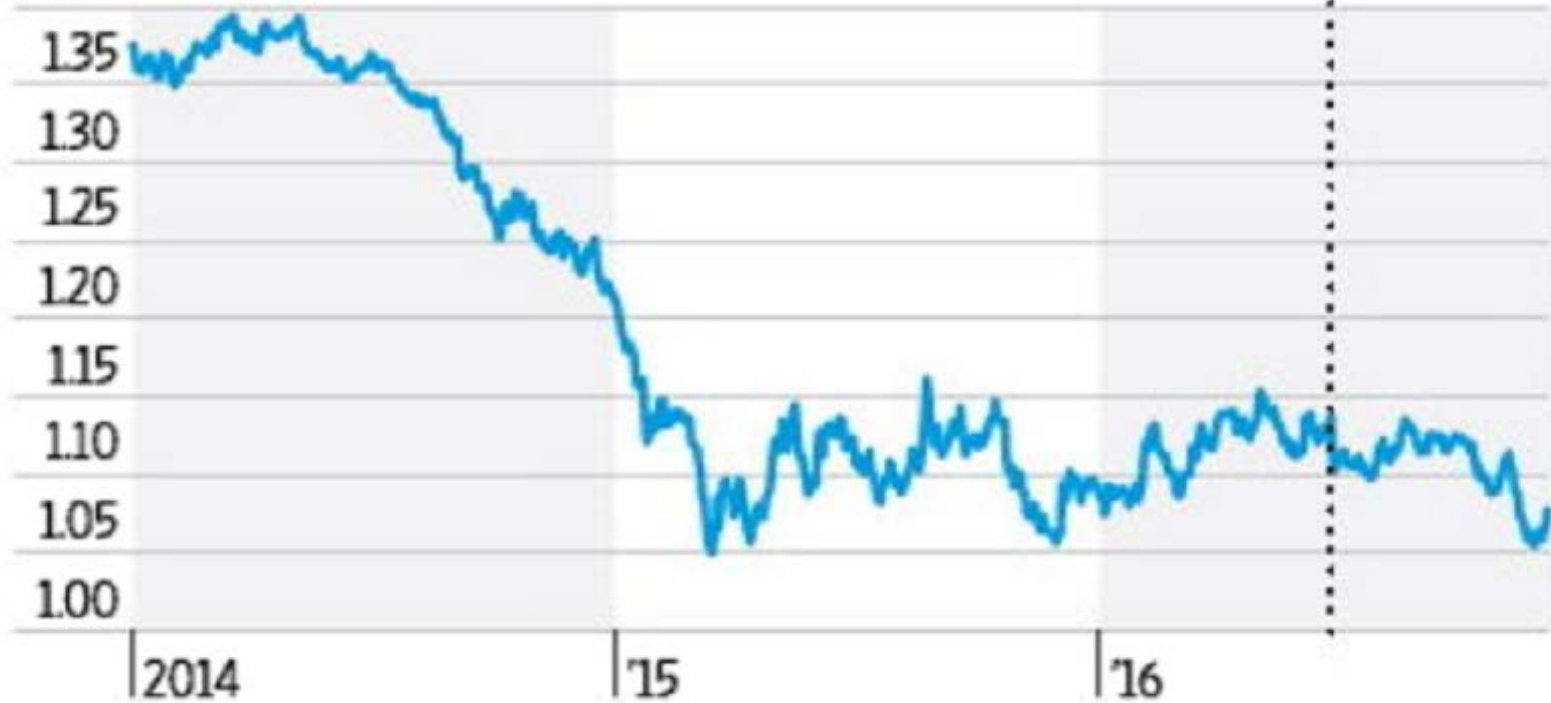
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2014

'15

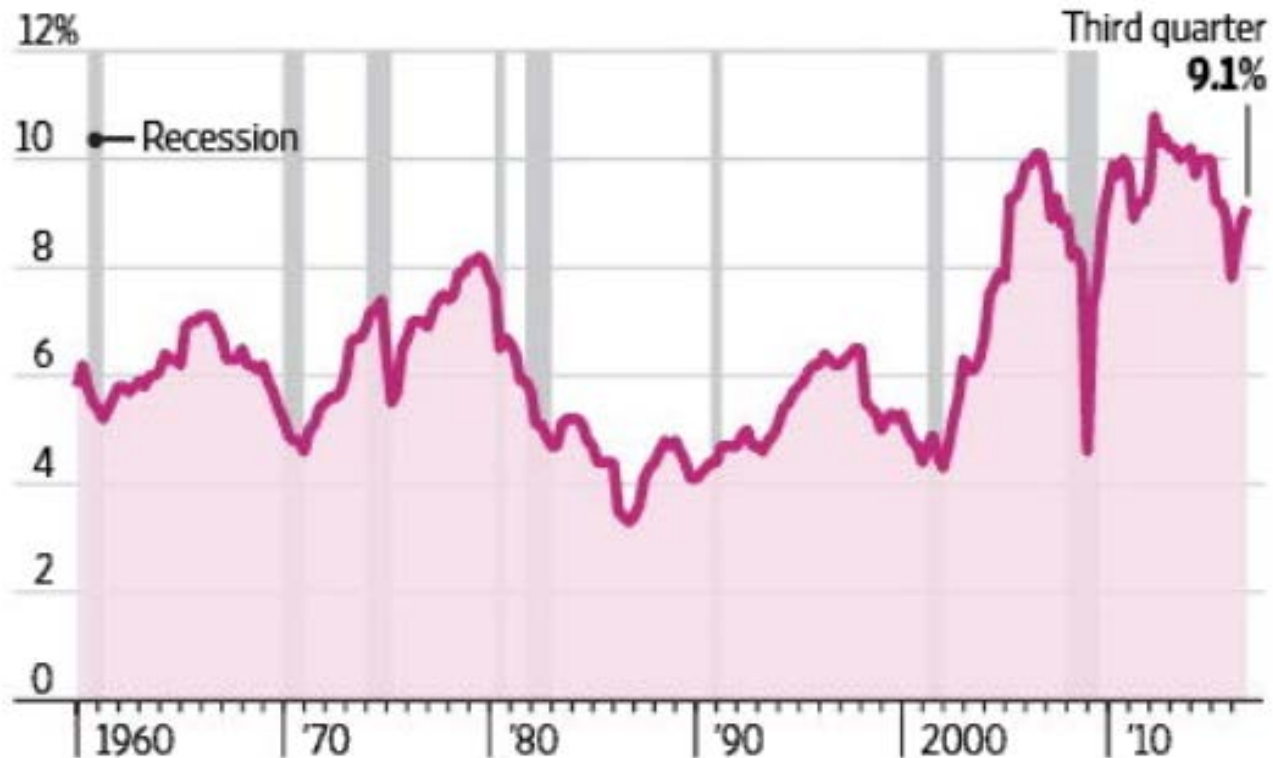
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Brexit
vote



Corporate Profits Returning

Corporate profits, as a share of U.S. gross domestic product, are rebounding but remain below their pre-2015 highs.



Note: Profits are calculated after tax, without inventory-valuation and capital-consumption adjustments. They are also adjusted for seasonality.

Summer Season

April – September 2016

Key Visitor Metrics (Apr. – Sep. 2016)

(Overnight Visitors Staying in Charlotte County Commercial Lodgings)

Estimated Number
of Visitors

- 2015: 195,100 people
- 2016: 203,900 people **+4.5%**

Estimated Direct
Expenditures

- 2015: \$156,343,400
- 2016: \$167,681,200 **+7.3%**

Total Economic
Impact

- 2015: \$238,423,700
- 2016: \$255,713,800 **+7.3%**

Key Visitor Metrics (Apr. – Sep. 2016)

(Overnight Visitors Staying in Charlotte County Commercial Lodgings)

Average Immediate
Party Size

- 2015: 3.0 people
- 2016: 3.0 people

Average Length of
Stay in Charlotte

- 2015: 6.3 nights
- 2016: 6.2 nights

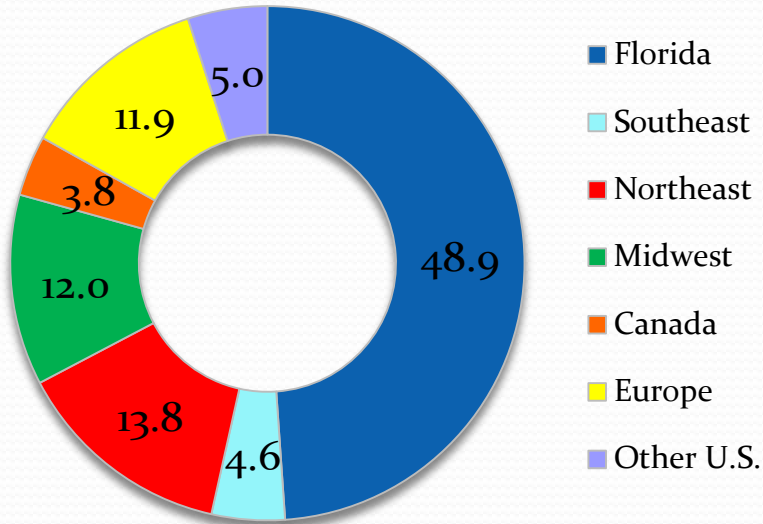
Average Party
Budget

- 2015: \$2,404.05
- 2016: \$2,467.12

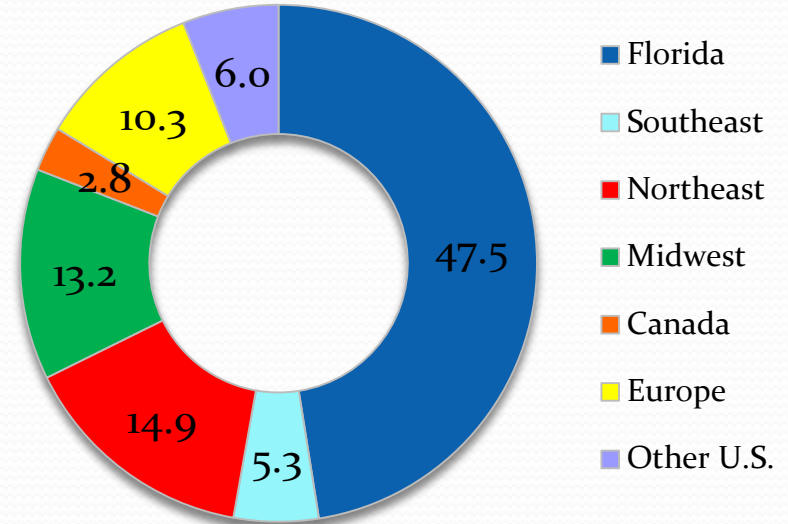
Visitor Origin Distribution

(Apr. – Sept. 2016)

Summer 2015



Summer 2016



Visitor Origin Markets

	Summer 2015	Summer 2016	Δ %
Florida	95,400	96,850	+1.5
Southeast	8,980	10,810	+20.4
Northeast	26,920	30,380	+12.9
Midwest	23,410	26,920	+15.0
Canada	7,410	5,710	-22.9
Europe	23,220	21,000	-9.6
US Opp Markets	9,760	12,230	+25.3
YTD	195,100	203,900	+4.5

Top Domestic DMA's

(Apr. – Sep. 2016)

	Rank Order 2015	Rank Order 2016
Tampa/St. Petersburg	1	1
Greater Orlando Area	3	2
Ft. Myers/Naples	2	3
Boston	4	4
New York	5	5
Chicago	--	6
Cincinnati	--	7
Philadelphia	7	8
Pittsburgh	--	9
Atlanta	6	10
Cleveland	8	11

Smith Travel Research Occupancy

	Charlotte County					
	Occupancy			ADR		
	2015	2016	Δ %	2015	2016	Δ %
April	66.0%	65.4%	-0.9%	\$95.26	\$92.84	-2.5%
May	56.3	60.2	+6.9	82.67	83.27	+0.7
June	55.1	55.7	+1.1	76.77	80.45	+4.8
July	54.7	60.0	+9.7	78.66	77.72	-1.2
August	49.0	50.4	+2.7	75.83	77.40	+2.1
September	51.6	51.8	+0.4	77.23	78.23	+1.3
Apr. - Sep. Average	55.5%	57.3%	+3.2%	\$81.07	\$81.65	+0.7%

Purpose of Trip

(Multiple Response)

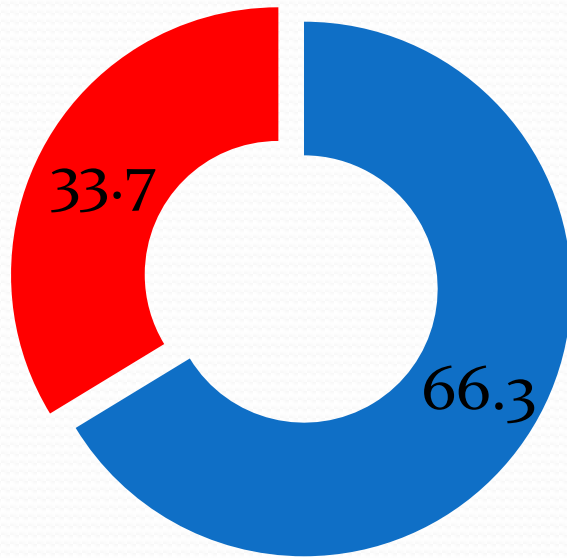
	Summer 2015	Summer 2016
Vacation/Getaway	90.9%	89.6%
To Visit with Friends/Family	26.7	25.1
Family Events	9.9	10.9
Business/Meeting	7.9	9.1
A Fishing Trip	7.5	8.9
A Boating Trip	5.6	4.9

Types of Websites Consulted for Travel Information *(Multiple Response)*

	Summer 2015	Summer 2016
Hotel Websites	46.7%	49.1%
Destination Sites	44.4	48.4
Review/Rating Sites <i>(i.e., Trip Advisor, Yelp, etc.)</i>	41.0	46.9
Booking Sites <i>(i.e., Travelocity, Expedia, etc.)</i>	34.9	33.2
Airline Websites	33.9	32.7
Mapping Sites <i>(i.e., Map Quest, Google Maps, etc.)</i>	26.9	29.6
Rental Car Websites	25.0	27.9
Restaurant Websites	22.6	24.5
Daily Deal/Coupon Sites <i>(i.e., Groupon, Living Social, etc.)</i>	20.8	16.1
Social Networking Sites <i>(i.e., Facebook, Twitter, Pinterest, etc.)</i>	19.2	17.6

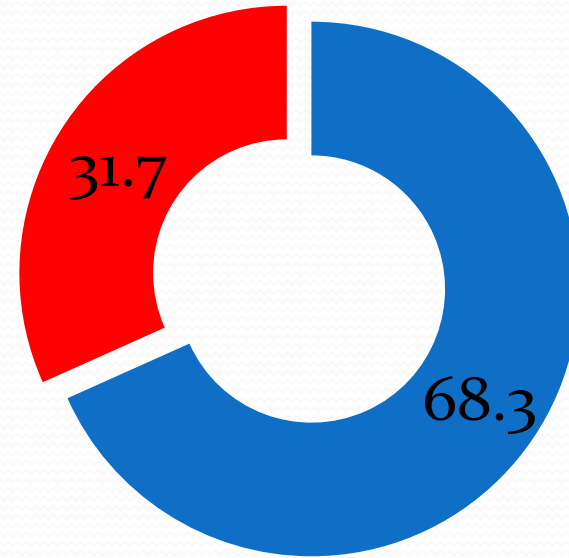
Booked Travel Arrangements on the Internet for Trip *(Prompted)*

Summer 2015



■ Yes ■ No/Don't Know

Summer 2016

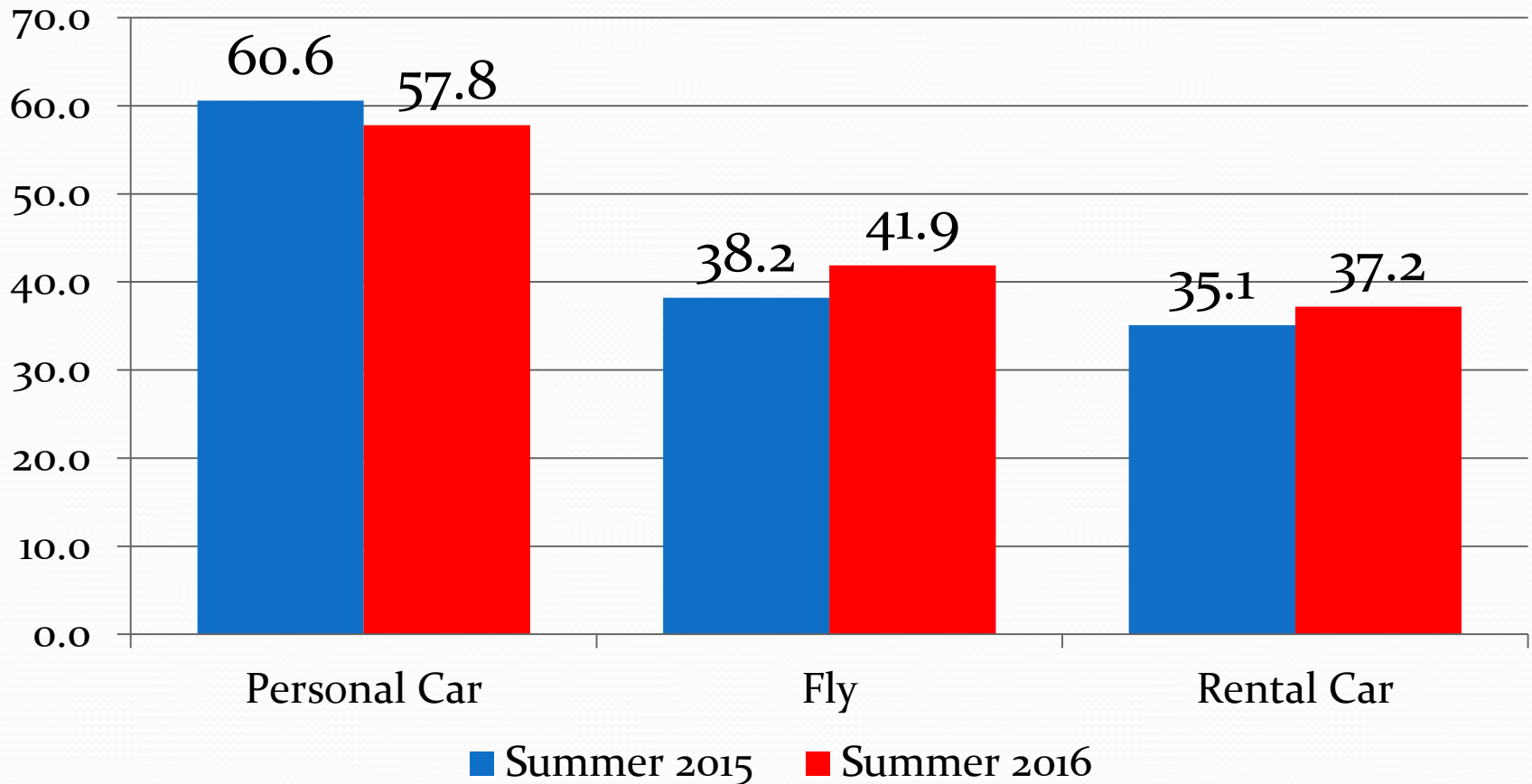


■ Yes ■ No/Don't Know

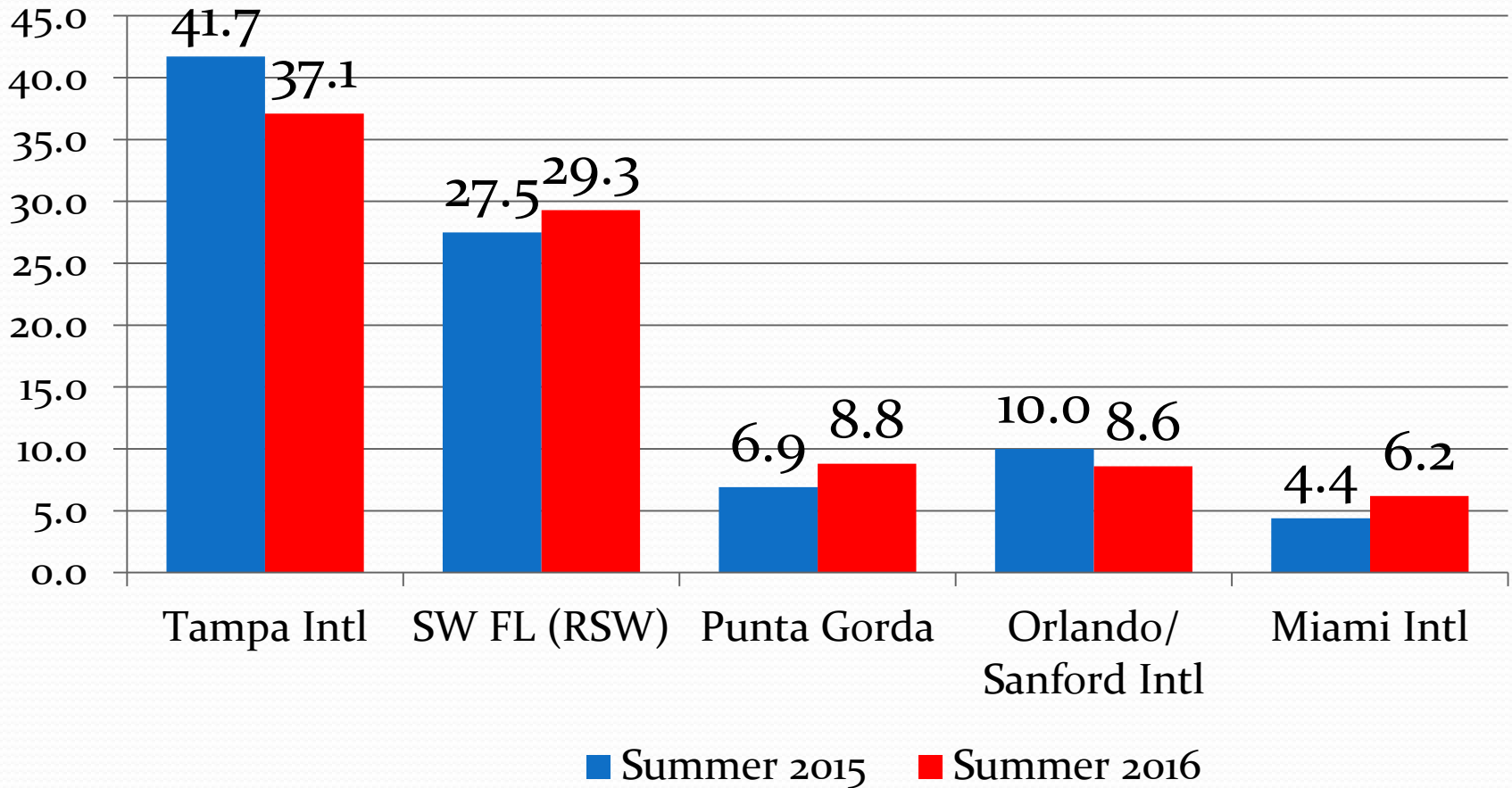
Charlotte Messaging

	Summer 2015	Summer 2016
Seen/Read/Heard Charlotte Message	42.3%	45.6%
Influenced (Base: Resp. who saw/read/heard msg.)	72.5	74.4

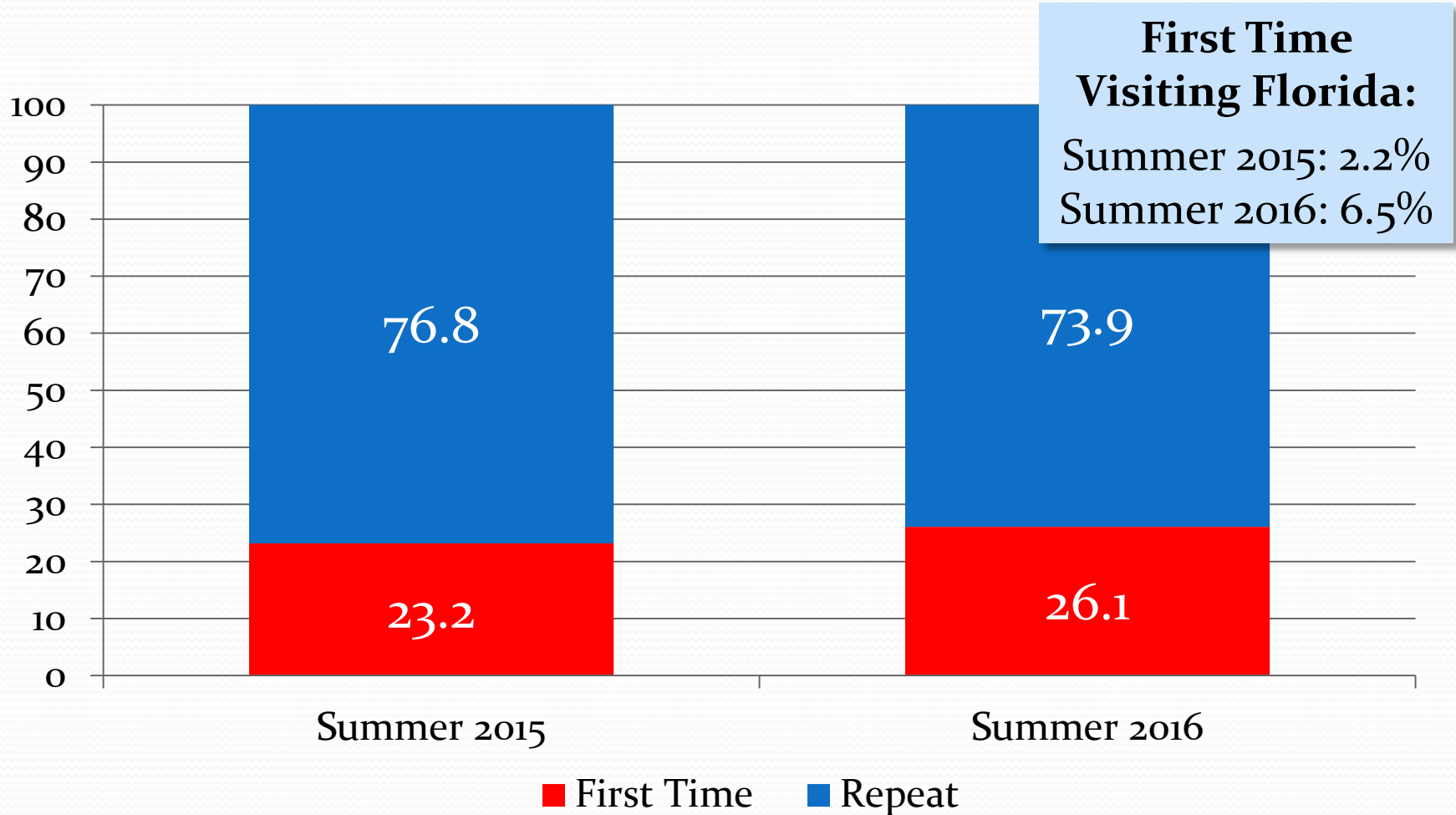
How Visitors Travel to Charlotte



Airports Deplaned (Visitors who flew)



Repeat Charlotte County Visitation

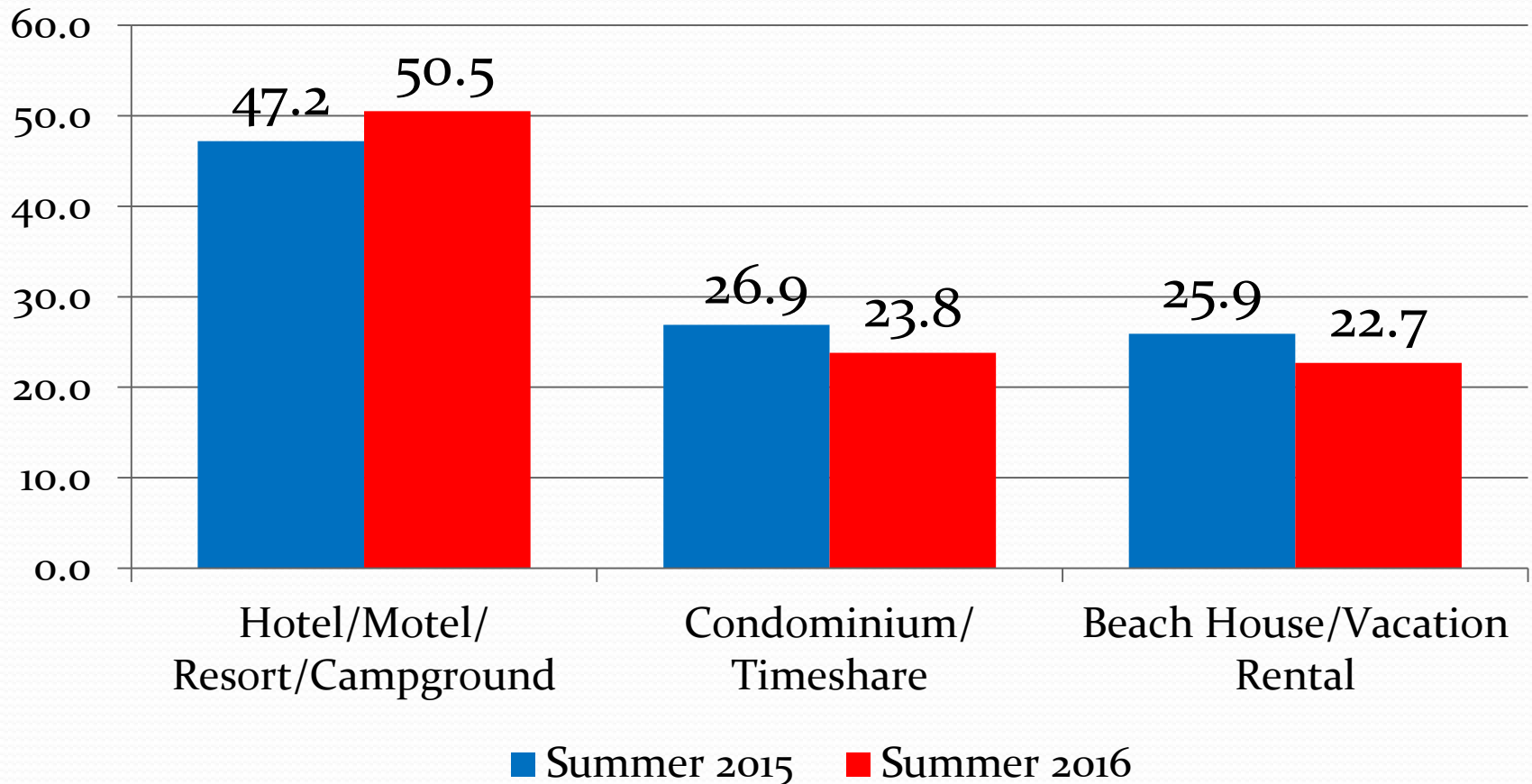


How First Learn About Charlotte

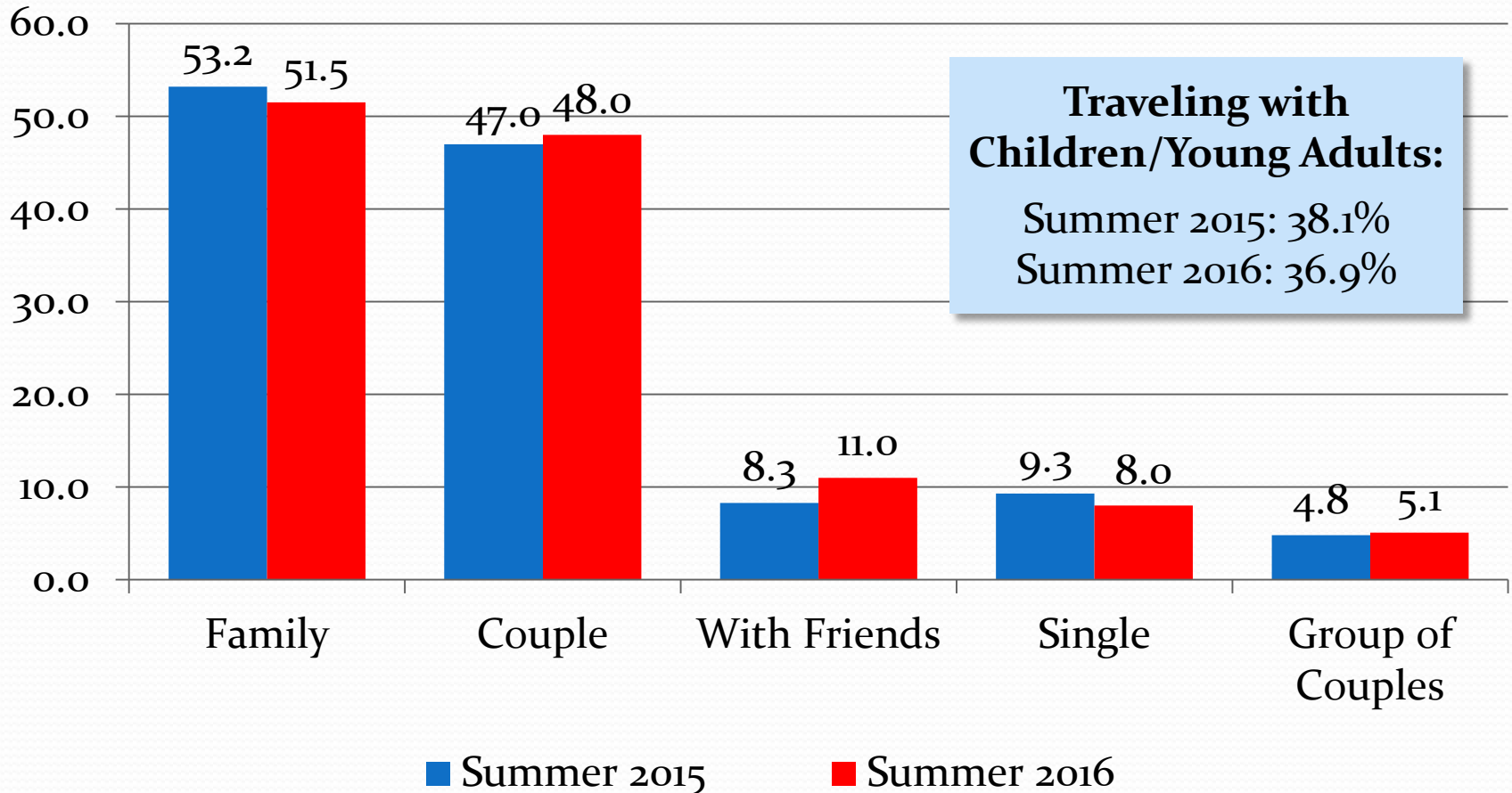
(Multiple Response)

	Summer 2015	Summer 2016
Recommendation	61.2%	57.6%
Internet	37.9	39.5
Brochure/Visitor Guide	14.4	11.8
Magazine/News Story	10.0	9.5

Type of Lodging Used



Party Composition *(Multiple Response)*

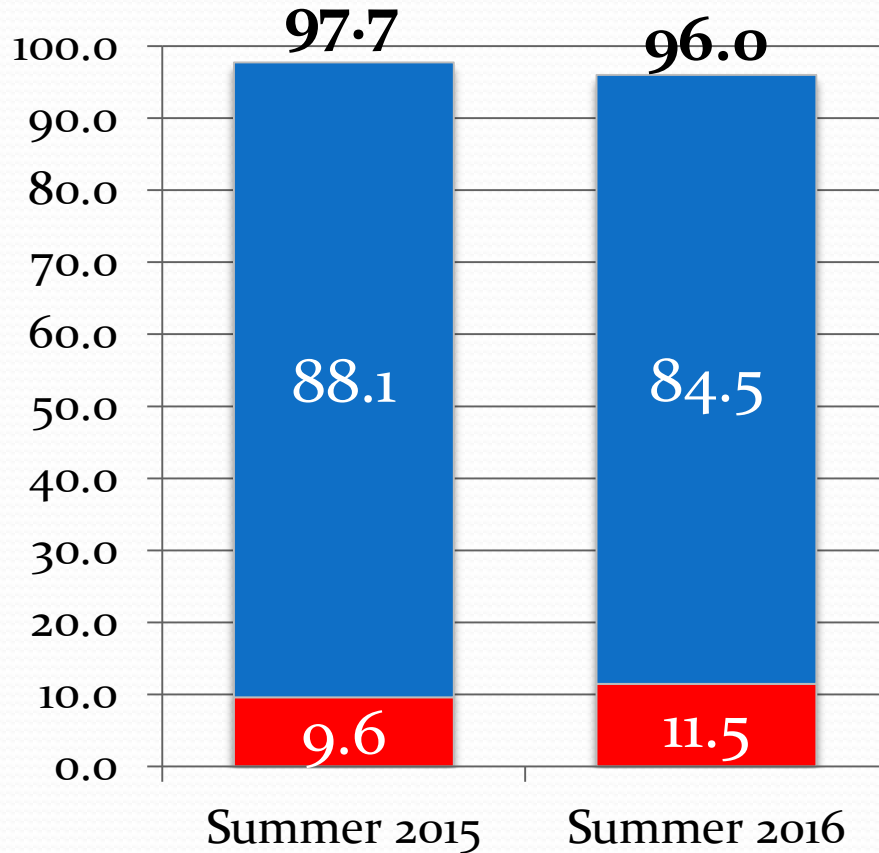


Activities Enjoyed in Area

(Multiple Response)

	Summer 2015	Summer 2016
Dining Out	81.8%	84.7%
Relaxing	80.7	83.3
Beach	87.4	82.5
Walking on the Beach	74.0	72.5
Swimming	72.5	69.9
Pool	55.4	57.4
Shopping	52.6	55.7
Reading	58.6	54.9
Shelling	52.7	50.4
Fishing	37.8	38.3
Visiting with Friends/Relatives	28.6	30.6
Bars/Drinking Places	33.2	28.7

Satisfaction/Plan to Return



92.6% of Summer 2016 visitors plan to return to the area
(*Summer 2015: 94.2%*).

- Combined
- Very Satisfied
- Satisfied

Demographics

	Summer 2015	Summer 2016
Average Age	51.2 years	50.9 years
Median Household Income	\$97,115	\$96,943

Charlotte Comments



Charlotte Comments

- Everything is so green and beautiful. It's exotic.
- Very family friendly, having a good time, not over crowded.
- Affordable.
- Natural beaches.
- Best kept secret. Peaceful and quiet, beautiful beaches, great fishing.
- Clear water, white sand beaches, great shelling.
- Very quaint, convenient location, gorgeous weather, people are wonderful.
- Glad we checked it out.
- Nothing like Orlando (which is good). Super friendly people, not too busy, love the Tiki bar.
- We have enjoyed what we've done and are thinking about coming back to stay longer.
- Small home town feel.
- Quiet, good place to escape.
- Great shark teeth and shelling.
- Quiet and pristine, old style Florida.
- Loved it here, people were great, sights were amazing, will be back as soon as I possibly can.
- Good place to travel with kids for quiet vacation.

Thank You!!

