Naples, Marco Island, Everglades Convention and Visitors Bureau

August 2020 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 2020

# Naples, Marco Island, Everglades Visitor Profile | August 2020

| H/M/C+ Visitor Statistics | Year to Date (January – August) | | % Δ | August | | % Δ |
	2019	2020	'19/'20	2019	2020	'19/'20
Visitors (#)	1,346,800	950,100	-29.5	112,700	93,100	-17.4
Room Nights	1,751,300	1,219,400	-30.4	155,400	122,400	-21.2
Direct Exp. ($)	$1,130,868,200	$748,802,800	-33.8	$66,364,500	$54,160,900	-18.4
Total Eco. Impact ($)	$1,686,124,400	$1,116,465,000	-33.8	$98,949,500	$80,753,900	-18.4

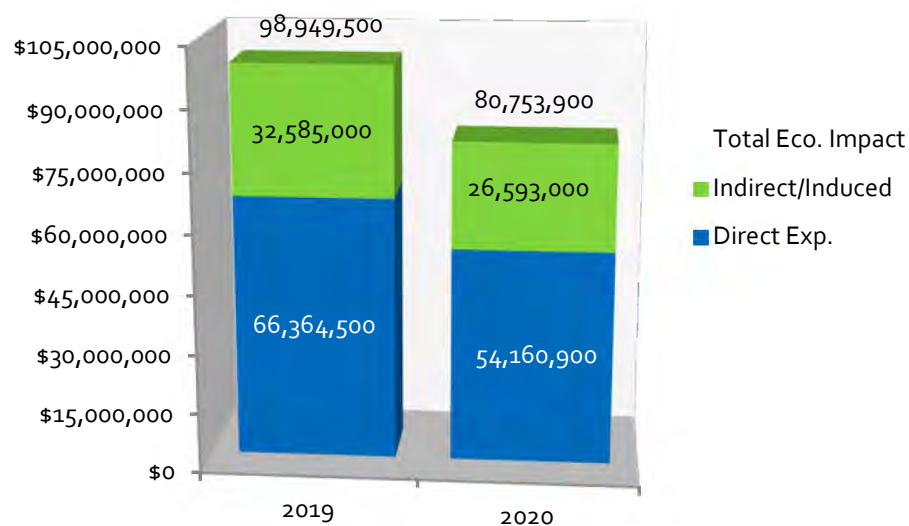+ Visitors staying in commercial lodging subject to the resort tax (hotel/motel/condo, etc.)

August Occupancy
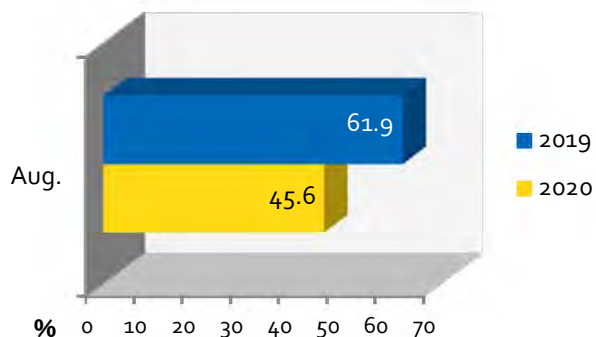
August Room Rates
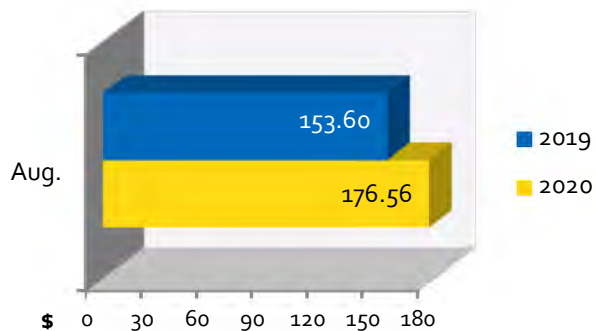
## August Economic Impact

August

Lodging Statistics	2019	2020	% Δ '19/'20
Occupancy	61.9%	45.6%	-26.3
Room Rates	$153.60	$176.56	+14.9
RevPAR	$95.10	$80.51	-15.3

Research Data market research+

August 2020 Visitor Origin Markets

Visitor Origins	2019		2020		% Δ '19/'20
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	48.2%	54,321	81.8%	76,156	+40.2
Southeast	4.9	5,522	5.4	5,027	-9.0
Northeast	7.8	8,791	4.0	3,724	-57.6
Midwest	9.7	10,932	4.6	4,283	-60.8
Canada*	1.3	1,465	0.0	0	-100.0
Europe*	23.3	26,259	0.0	0	-100.0
Other	4.8	5,410	4.2	3,910	-27.7
Total	**100.0**	**112,700**	**100.0**	**93,100**	**-17.4**

August 2020 Canadian and European visitation was too small to measure.

August 2020 Visitor Origins

Research Data
market research+
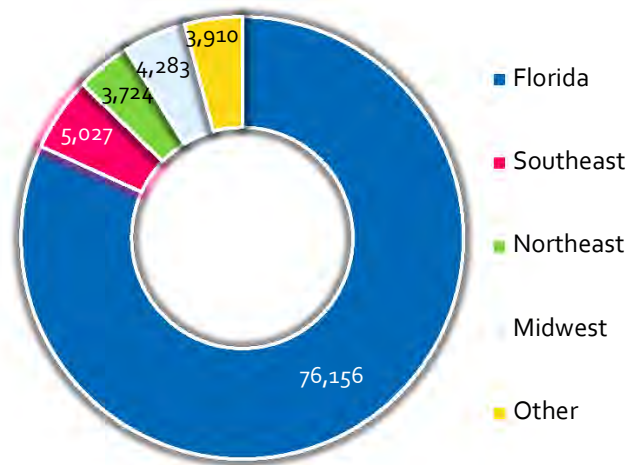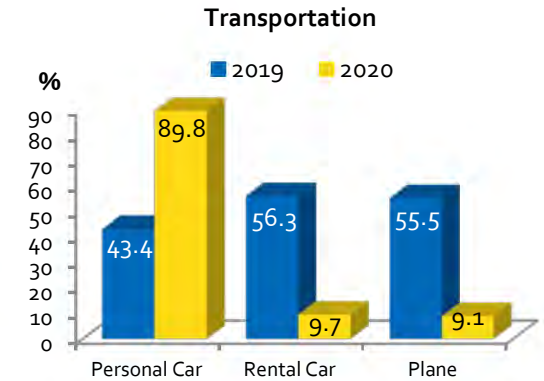
Naples, Marco Island, Everglades Visitor Profile | August 2020

Transportation Mode (Multiple Response)	August 2019	August 2020	
Personal Car	43.4%	89.8%	↑
Rental Car	56.3	9.7	↓
Plane	55.5	9.1	↓

Transportation

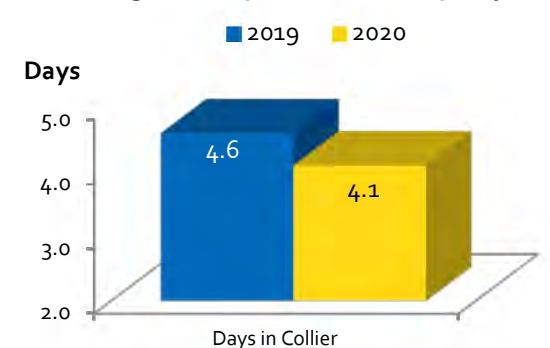| Airport Deplaned (Base: Flew)	August 2019	August 2020	
Southwest Florida International	53.0%	96.9%	↑
Ft. Lauderdale International	11.1	1.3	↓
Tampa International	6.0	1.0	↓
Miami International	19.1	N/A	↓
Orlando International/Sanford	8.9	N/A	↓

Airport Deplaned (Top Three)
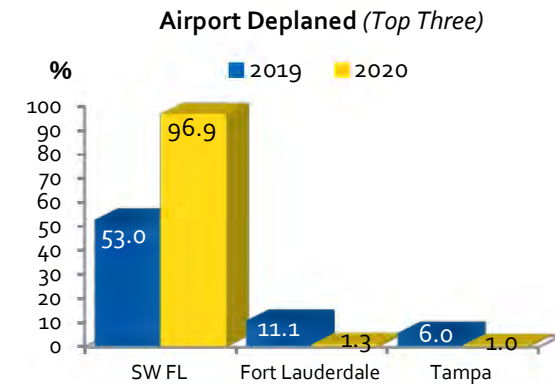
Purpose of Trip (Multiple Response)	August 2019	August 2020	
Vacation/Weekend Getaway	81.7%	93.4%	↑
Visit with Friends and Relatives	9.0	12.5	↑
Group Travel	20.5	1.1	↓
Special Event	5.2	N/A	↓

First Visit to (% yes)	August 2019	August 2020	
Collier County	43.5%	21.7%	↓
Florida	10.7	N/A	↓

Length of Stay (Days)	August 2019	August 2020	
In Collier County	4.6	4.1	↓

Length of Stay in Collier County (Days)

Party Size	August 2019	August 2020	
Number of People	2.7	2.8	↑

Research Data market research+

Naples, Marco Island, Everglades Visitor Profile | August 2020

Party Composition *(Multiple Response)*

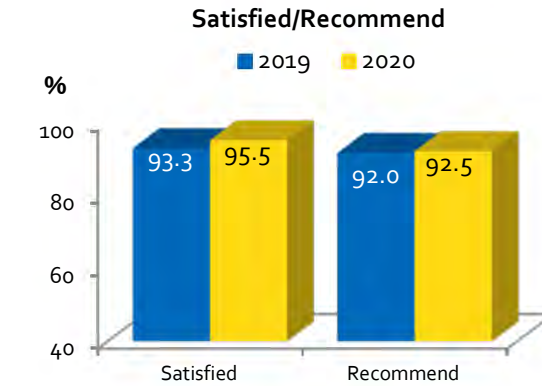|	August 2019	August 2020	
Couple	41.9%	56.0%	↑
Family	43.6	40.5	↓
Single	10.8	3.4	↓
Group of Friends	3.0	N/A	↓

Party Composition *(Top Three)*
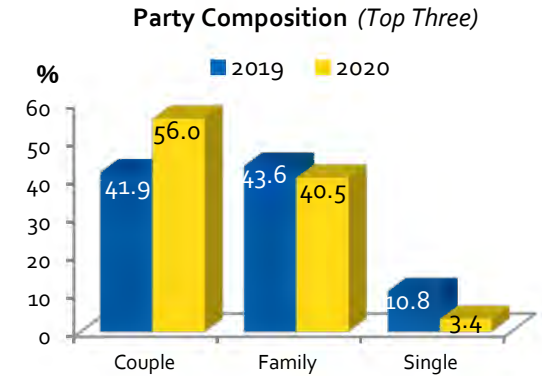
Did Party Have Lodging Reservations for Stay

	August 2019	August 2020	
% Yes	94.6%	97.5%	↑

Expense Relative to Expectations

	August 2019	August 2020	
More Expensive	16.8%	9.1%	↓
Less Expensive	9.0	3.5	↓
As Expected	70.8	82.9	↑

Satisfied/Recommend

Satisfaction with Collier County

	August 2019	August 2020	
Very Satisfied	85.0%	75.0%	↓
Satisfied	8.3	20.5	↑
Satisfaction Level *(Combined)*	**93.3%**	**95.5%**	↑

Recommend Collier to Friends/Relatives

	August 2019	August 2020	
% Yes	92.0%	92.5%	↑
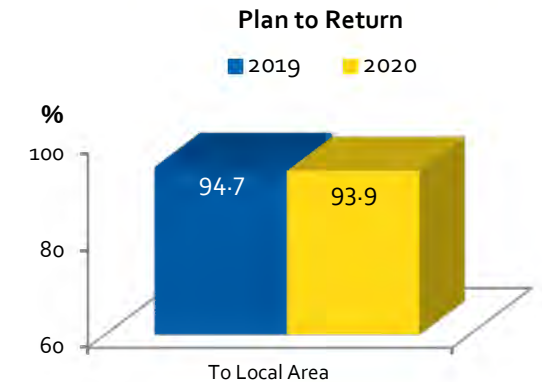
Plan to Return *(% Yes)*

	August 2019	August 2020	
To Local Area	94.7%	93.9%	↓

Plan to Return

Research Data
market research+

Naples, Marco Island, Everglades Visitor Profile | August 2020

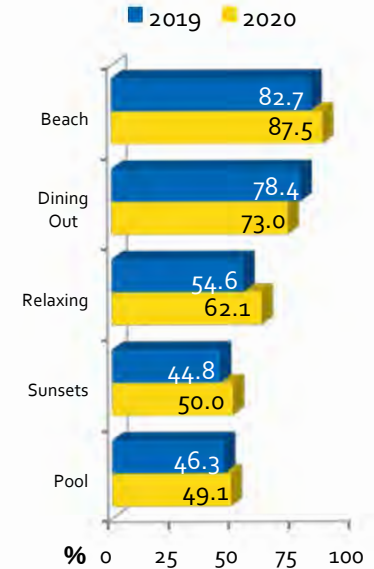| Activities Enjoyed in Area (Multiple Response)	August 2019	August 2020	
Beach	82.7%	87.5%	↑
Dining Out	78.4	73.0	↓
Relaxing	54.6	62.1	↑
Sunsets	44.8	50.0	↑
Pool	46.3	49.1	↑
Swimming	23.8	34.2	↑
Enjoying Nature/Bird Watching/Everglades	23.6	30.9	↑
Shopping	55.7	30.8	↓
Walking	26.1	25.0	↓
Sunning	26.4	23.6	↓
Reading	32.4	20.9	↓
Shelling	17.5	15.2	↓
Visiting with Friends/Relatives	10.9	13.8	↑
Sightseeing	38.7	8.8	↓
Fishing	10.7	6.9	↓
Boating	8.3	5.6	↓
Golfing	7.9	4.7	↓
Art Galleries/Shows/Fairs	11.2	2.3	↓
Bars/Nightlife	21.8	N/A	↓

Demographics	August 2019	August 2020	
Average Age Head of Household (Years)	46.4	44.5	↓
Median Annual Household Income	$158,955	$135,938	↓

Collier Base Budget	August 2019	August 2020	
Total	$1,589.92	$1,628.90	↑
Per Person/Stay	588.86	581.75	↓
Per Person/Day	128.01	141.89	↑

Activities Enjoyed in Area (Top Five)

Legend: 2019, 2020

	2019	2020
Beach	82.7	87.5
Dining Out	78.4	73.0
Relaxing	54.6	62.1
Sunsets	44.8	50.0
Pool	46.3	49.1

% 0 25 50 75 100

Collier Base Budgets

Legend: 2019, 2020

$

	2019	2020
Total Party Budget	1,590	1,629
Per Person/Stay	589	582
Per Person/Day	128	142

1,800 1,200 600 0

Research Data
market research+
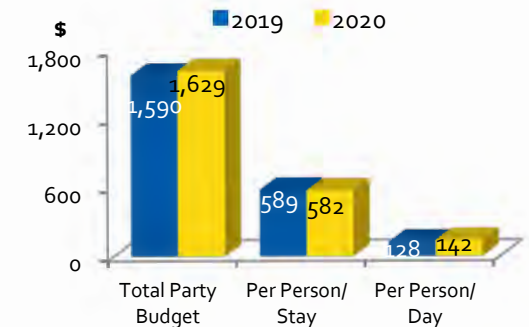
Naples, Marco Island, Everglades Visitor Profile | August 2020

| Area Information Seen/Read/Heard	August 2019	August 2020	
% Yes	59.8%	48.8%	↓

Seen/Read/Heard

■ 2019 ■ 2020

Directly Influenced by Information (Base: Seen/Read/Heard Area Information)	August 2019	August 2020	
% Yes	54.2%	56.0%	↑

Info. Influenced

■ 2019 ■ 2020

Why Chose the Area (Multiple Response)	August 2019	August 2020	
Beach Area	62.5%	69.3%	↑
Quality of Accommodations	53.8	48.1	↓
Relaxing	39.9	46.5	↑
Quiet/Peaceful/Laid Back	48.1	37.5	↓
Previous Experience	39.3	37.5	↓
Not Crowded	30.0	34.4	↑
Restaurants	37.5	32.4	↓
Appealing Brochures/Websites	23.8	31.9	↑
Weather	30.8	31.6	↑
Convenient Location	--	25.0	—
Recommendation	16.4	25.0	↑
Outdoor Recreation/Nature	25.5	20.7	↓
Never Been	19.1	5.9	↓
Business/Meeting/Conference	17.1	N/A	↓

Internet Use

■ 2019 ■ 2020

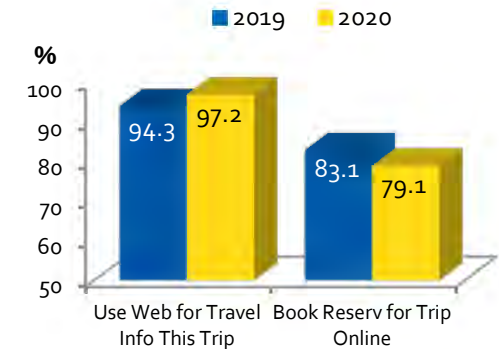| Internet Use	August 2019	August 2020	
Use Internet to Obtain Travel Info for This Trip (% Yes)	94.3%	97.2%	↑
Book Reservations for Trip Online (%Yes)	83.1	79.1	↓

Research Data
market research+
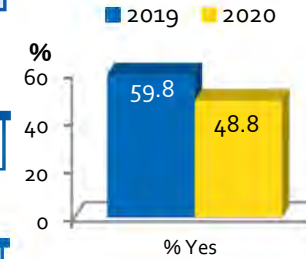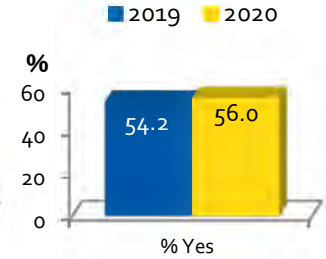
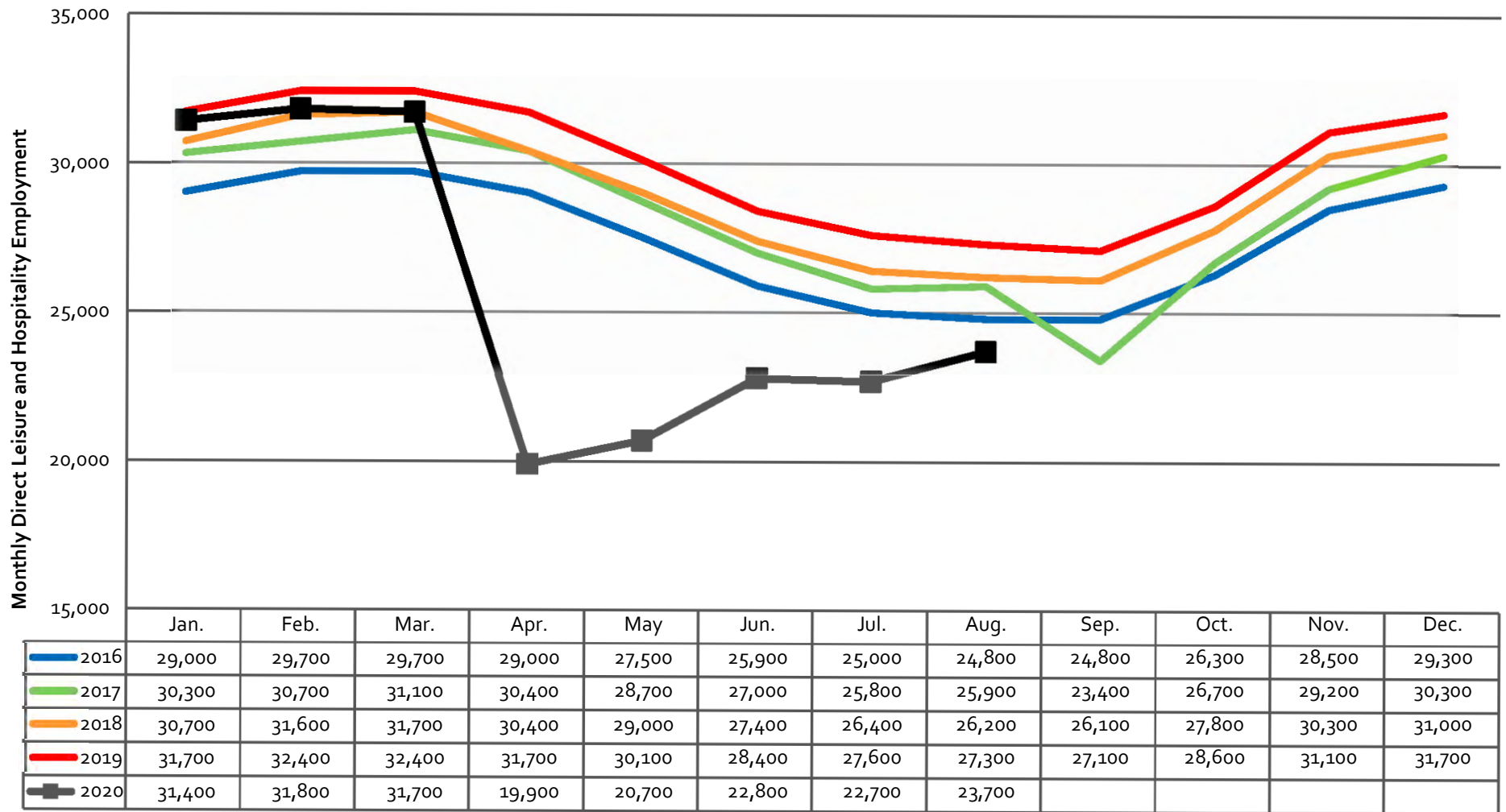# Industry Data:

2016 - 2020

Collier Direct Leisure and Hospitality Employment *(Calendar Year)* *

	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
2016	29,000	29,700	29,700	29,000	27,500	25,900	25,000	24,800	24,800	26,300	28,500	29,300
2017	30,300	30,700	31,100	30,400	28,700	27,000	25,800	25,900	23,400	26,700	29,200	30,300
2018	30,700	31,600	31,700	30,400	29,000	27,400	26,400	26,200	26,100	27,800	30,300	31,000
2019	31,700	32,400	32,400	31,700	30,100	28,400	27,600	27,300	27,100	28,600	31,100	31,700
2020	31,400	31,800	31,700	19,900	20,700	22,800	22,700	23,700				

* SOURCE: Florida Department of Economic Opportunity, Labor Market Information, Current Employment Statistic Program (CES), Collier County Leisure and Hospitality Sector. (April 2018 through December 2019 employment projections revised as of March 16, 2020 reporting.)

Southwest Florida International Airport (RSW) Passenger Traffic

CY 2016: 8.60 million (+2.8%)

CY 2017: 8.84 million (+2.8%)

CY 2018: 9.37 million (+6.0%)

CY 2019: 10.23 million (+9.1%)

CY 2020 to date: 4.16 million (-42.0%)

RSW Total Passenger Traffic
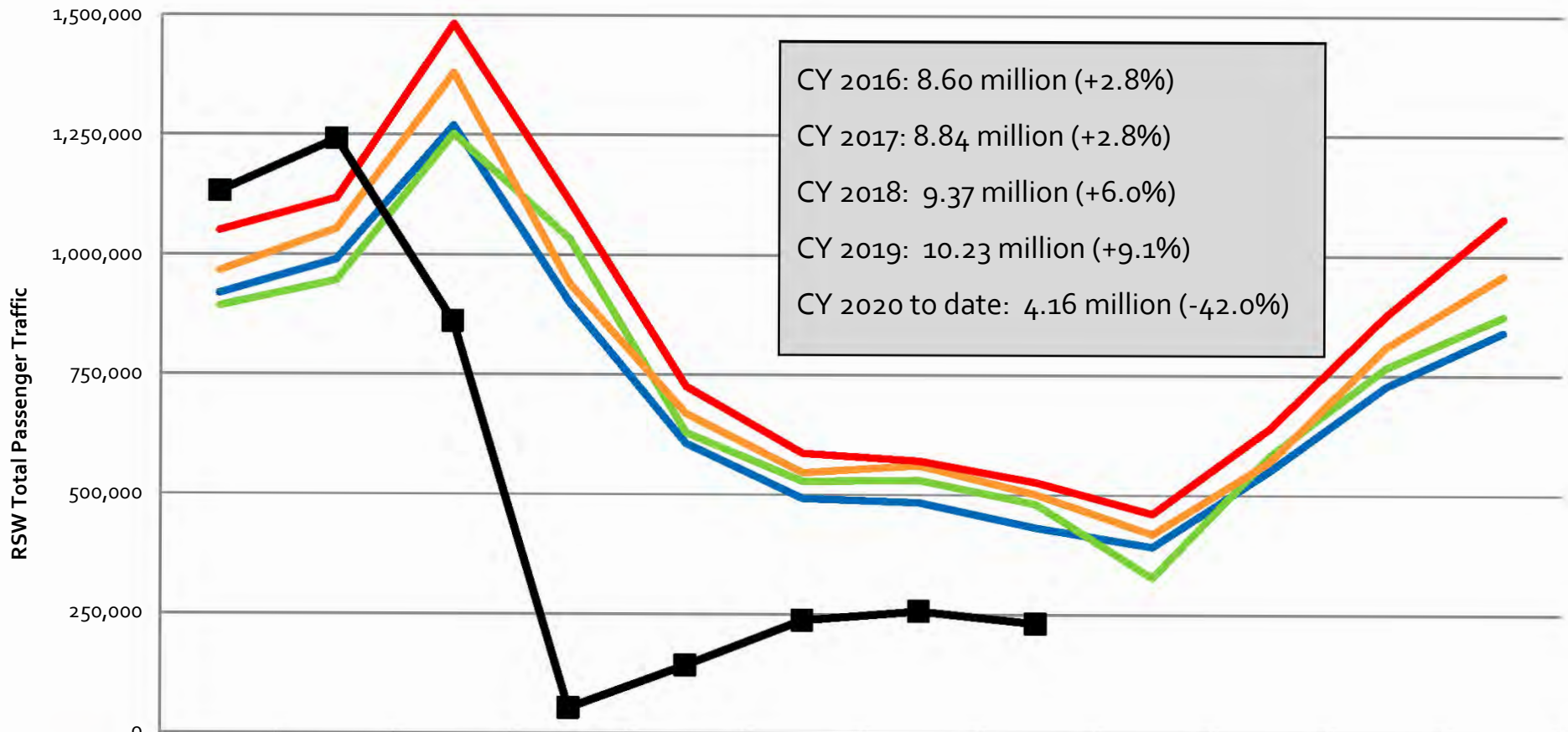
	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
2016	918,929	989,845	1,269,961	900,594	606,833	492,413	484,074	431,729	391,844	550,316	727,634	840,501
2017	892,905	946,079	1,252,124	1,032,783	629,321	528,383	530,428	481,185	327,466	581,317	767,064	873,494
2018	965,981	1,053,817	1,379,728	939,957	668,665	546,159	561,039	501,023	418,256	569,553	810,283	958,717
2019	1,050,093	1,117,409	1,482,239	1,111,558	725,754	586,319	570,977	526,519	460,869	638,922	876,703	1,077,818
2020	1,132,103	1,241,590	861,221	53,379	143,004	237,706	256,418	231,283				

Research Data
market research+