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Naples, Marco Island, Everglades Convention and Visitors Bureau February 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

March 2020

Naples, Marco Island, Everglades: February 2020 Summary

Executive Summary: February 2020

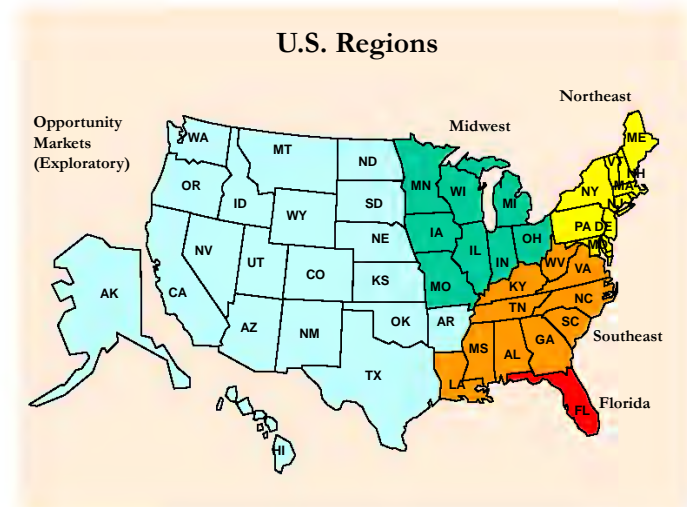
- This February, some **225,800** visitors stayed in Collier's commercial lodgings **(+6.9%)***. Their visits contributed an estimated **\$328,304,900** of economic impact to the County **(+12.4%)**. Key performance metrics are as follows:

<u>February</u>	<u>2019</u>	<u>2020*</u>	<u>% Δ</u>
Occupancy	91.8%	90.4%	-1.5 %
ADR	\$381.40	\$396.18	+3.9%
RevPAR	\$350.10	\$358.15	+2.3%

* According to the Florida Department of Business and Professional Regulation (DBPR), Collier transient lodging inventory has grown by 842 units (+8.4%) since February of 2019. (2019: 10,013; 2020: 10,855)

- Collier's February visitation originates from the following primary market segments:

<u>February Visitation</u>	<u>2020</u>	<u>Δ</u>
Florida	49,902	+13.5
Southeast	18,064	+17.1
Northeast	60,966	+0.2
Midwest	46,063	+10.1
Canada	8,580	-7.7
Europe	28,451	+2.8
Other	13,774	+12.4
Total	225,800	+6.9



Naples, Marco Island, Everglades: February 2020 Summary

3. Prior to March 10, 2020, 57.8% of Collier lodging managers reported their three month forward reservations levels as “up.” However, the responses submitted after March 10, 2020 paint a very different picture.

<u>% of Properties Reporting Reservations:</u>	<u>2019</u>	<u>Prior to Mar 10, 2020</u>	<u>After Mar 10, 2020</u>
Up	56.9%	57.8%	12.5%
Same	24.0	30.6	12.5
Down	19.2	11.6	75.0

4. This February, two-thirds of the destination’s visitor parties flew (2019: 70.4%; 2020: 71.6%). A majority of these (70.0%) deplaned at RSW, with Miami capturing some 13.7% of deplanements.
5. This February, visitor party size averaged 2.6 travelers who stayed for 3.2 nights in the Naples, Marco Island, Everglades area (2019: 2.6 people; 3.1 nights).
6. Some 34.7% of Collier’s February visitors are in the destination for the first time.
7. Fully 96.7% consult the web for trip information, with some 77.7% making bookings for their trip online.
8. The majority (95.7%) are satisfied with their Collier stay, with 88.3% planning a future trip to the area.
9. The typical February visitor is 52.3 years of age.

Naples, Marco Island, Everglades: *February 2020 Visitor Profile*

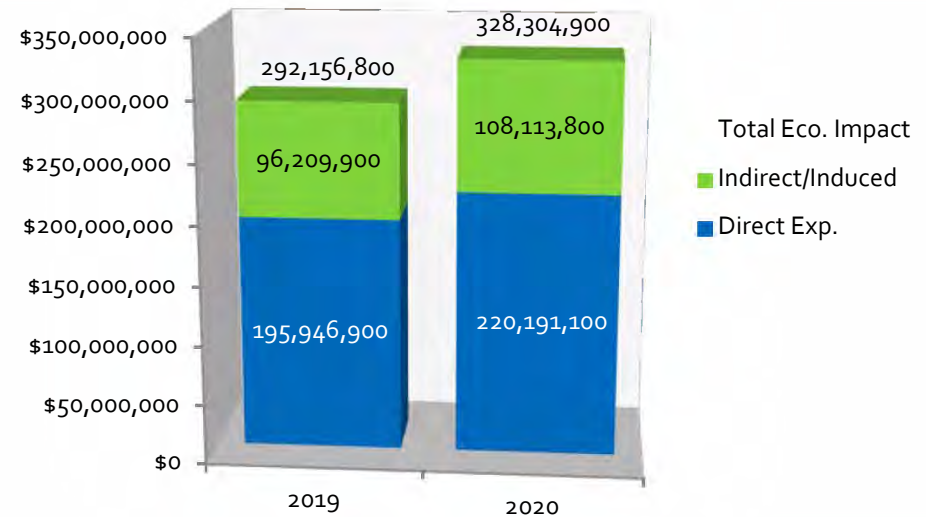
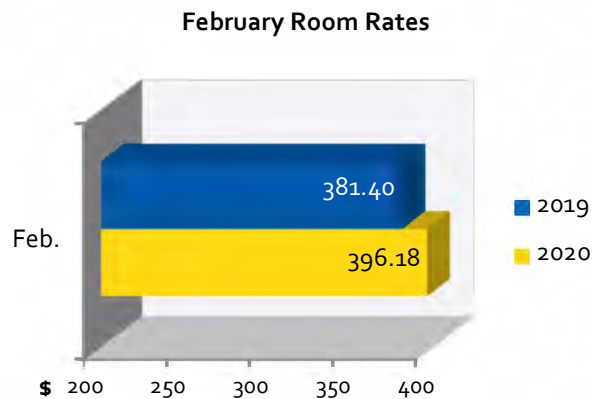
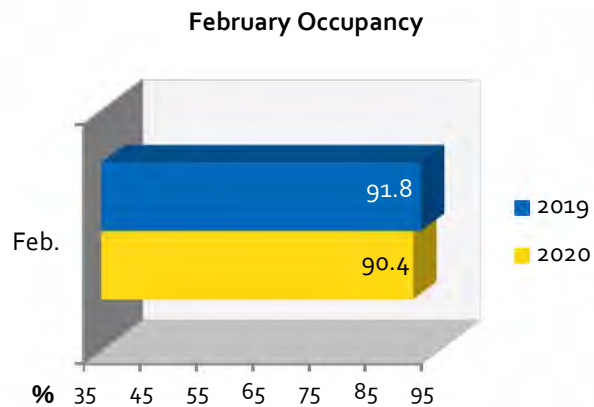


Naples, Marco Island, Everglades Visitor Profile | February 2020

H/M/C+ Visitor Statistics	Year to Date (January – February)			February		
	2019	2020	% Δ '19/'20	2019	2020	% Δ '19/'20
Visitors (#)	402,300	429,800	+6.8	211,300	225,800	+6.9
Room Nights	498,400	548,400	+10.0	260,400	287,300	+10.3
Direct Exp. (\$)	\$325,953,000	\$365,294,300	+12.1	\$195,946,900	\$220,191,100	+12.4
Total Eco. Impact (\$)	\$485,995,900	\$544,653,800	+12.1	\$292,156,800	\$328,304,900	+12.4

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

February Economic Impact



February

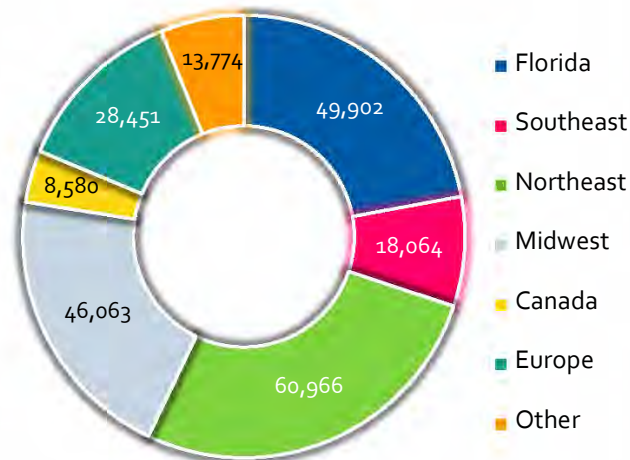
Lodging Statistics	2019	2020*	% Δ '19/'20
Occupancy	91.8%	90.4%	-1.5
Room Rates	\$381.40	\$396.18	+3.9
RevPAR	\$350.10	\$358.15	+2.3

* According to the Florida Department of Business and Professional Regulation (DBPR), Collier transient lodging inventory has grown by 842 units (+8.4%) since February of 2019. (2019: 10,013; 2020: 10,855)

February 2020 Visitor Origin Markets

Visitor Origins	2019		2020		% Δ '19/'20
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	20.8%	43,951	22.1%	49,902	+13.5
Southeast	7.3	15,425	8.0	18,064	+17.1
Northeast	28.8	60,855	27.0	60,966	+0.2
Midwest	19.8	41,837	20.4	46,063	+10.1
Canada	4.4	9,297	3.8	8,580	-7.7
Europe	13.1	27,680	12.6	28,451	+2.8
Other	5.8	12,255	6.1	13,774	+12.4
Total	100.0	211,300	100.0	225,800	+6.9

February 2020 Visitor Origins



Naples, Marco Island, Everglades Visitor Profile | February 2020

Transportation Mode (Multiple Response)	February 2019	February 2020	
Plane	70.4%	71.6%	↑
Rental Car	64.0	62.4	↓
Personal Car	28.9	27.7	↓

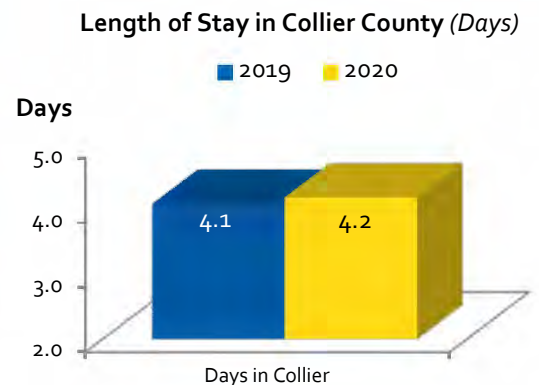
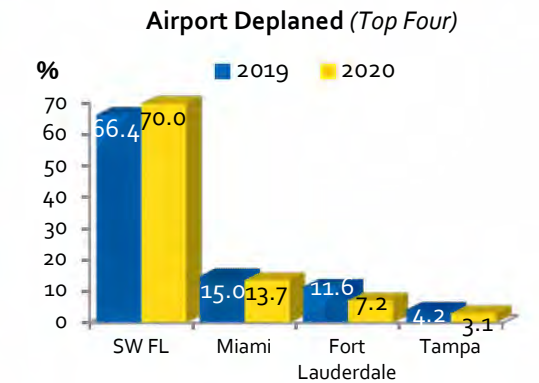
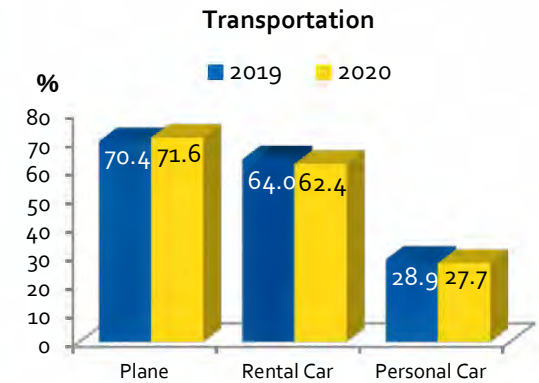
Airport Deplened (Base: Flew)	February 2019	February 2020	
Southwest Florida International	66.4%	70.0%	↑
Miami International	15.0	13.7	↓
Ft. Lauderdale International	11.6	7.2	↓
Tampa International	4.2	3.1	↓
Orlando International/Sanford	2.2	1.7	↓

Purpose of Trip (Multiple Response)	February 2019	February 2020	
Vacation/Weekend Getaway	71.3%	73.3%	↑
Group Travel	40.5	37.8	↓
Visit with Friends and Relatives	12.5	11.2	↓
Special Event	6.7	7.4	↑

First Visit to (% yes)	February 2019	February 2020	
Collier County	34.3%	34.7%	↑
Florida	3.2	3.7	↑

Length of Stay (Days)	February 2019	February 2020	
In Collier County	4.1	4.2	↑

Party Size	February 2019	February 2020	
Number of People	2.6	2.6	—



Naples, Marco Island, Everglades Visitor Profile | February 2020

Party Composition <i>(Multiple Response)</i>	February 2019	February 2020	
Couple	61.7%	63.3%	↑
Family	27.6	24.3	↓
Single	13.7	12.2	↓
Group of Friends	5.2	4.8	↓
Group of Couples	4.3	4.0	↓

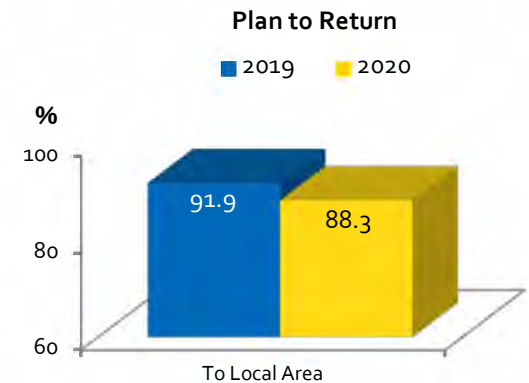
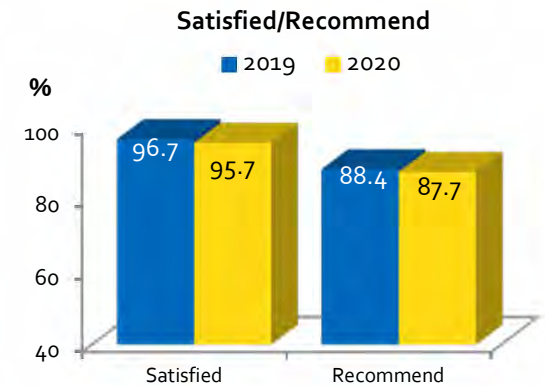
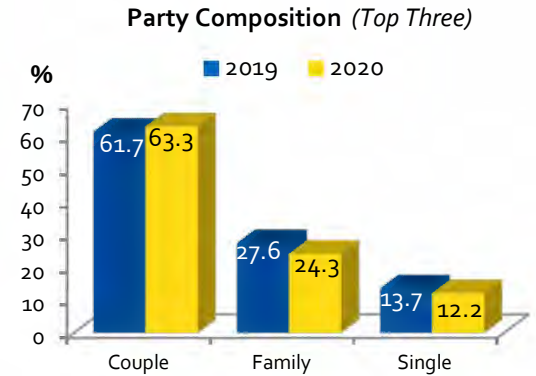
Did Party Have Lodging Reservations for Stay	February 2019	February 2020	
% Yes	95.9%	97.5%	↑

Expense Relative to Expectations	February 2019	February 2020	
More Expensive	19.3%	15.9%	↓
Less Expensive	1.5	2.2	↑
As Expected	77.2	73.9	↓

Satisfaction with Collier County	February 2019	February 2020	
Very Satisfied	84.7%	86.2%	↑
Satisfied	12.0	9.5	↓
Satisfaction Level (Combined)	96.7%	95.7%	↓

Recommend Collier to Friends/Relatives	February 2019	February 2020	
% Yes	88.4%	87.7%	↓

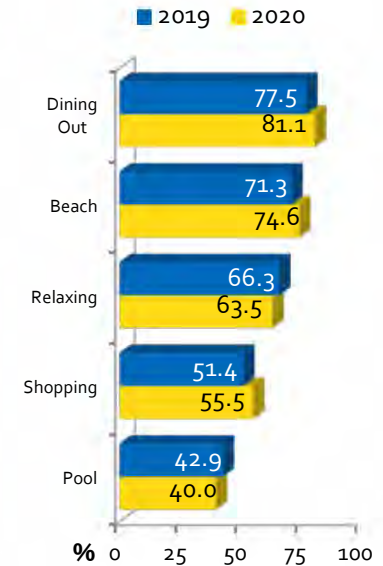
Plan to Return (% Yes)	February 2019	February 2020	
To Local Area	91.9%	88.3%	↓



Naples, Marco Island, Everglades Visitor Profile | February 2020

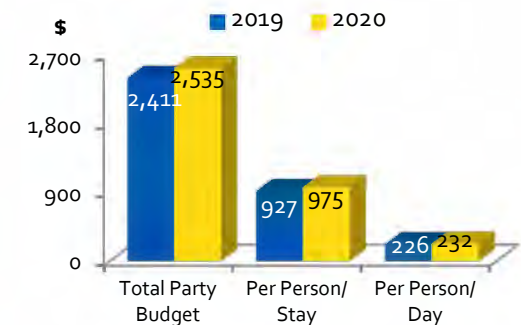
Activities Enjoyed in Area (Multiple Response)	February 2019	February 2020	
Dining Out	77.5%	81.1%	↑
Beach	71.3	74.6	↑
Relaxing	66.3	63.5	↓
Shopping	51.4	55.5	↑
Pool	42.9	40.0	↓
Sunsets	23.1	29.9	↑
Walking	29.6	24.6	↓
Enjoying Nature/Bird Watching/Everglades	27.1	24.1	↓
Art Galleries/Shows/Fairs	18.3	19.2	↑
Bars/Nightlife	21.1	18.4	↓
Visiting with Friends/Relatives	20.8	18.0	↓
Reading	20.9	17.2	↓
Sunning	16.6	14.1	↓
Fishing	--	12.2	—
Golfing	8.3	11.4	↑
Sightseeing	12.2	11.1	↓
Boating	--	9.4	—
Swimming	10.9	8.2	↓

Activities Enjoyed in Area (Top Five)



Demographics	February 2019	February 2020	
Average Age Head of Household (Years)	52.6	52.3	↓
Median Annual Household Income	\$173,987	\$173,333	↓

Collier Base Budgets

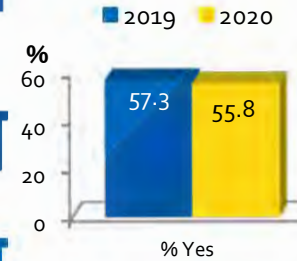


Collier Base Budget	February 2019	February 2020	
Total	\$2,411.08	\$2,535.42	↑
Per Person/Stay	927.34	975.16	↑
Per Person/Day	226.18	232.18	↑

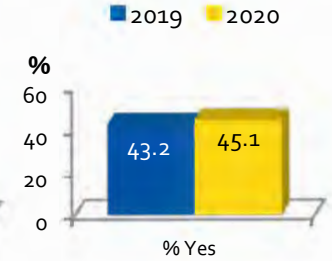
Naples, Marco Island, Everglades Visitor Profile | February 2020

Area Information Seen/Read/Heard	February 2019	February 2020	
% Yes	57.3%	55.8%	↓
Directly Influenced by Information (Base: Seen/Read/Heard Area Information)			
	February 2019	February 2020	
% Yes	43.2%	45.1%	↑
Why Chose the Area (Multiple Response)			
	February 2019	February 2020	
Beach Area	48.7%	50.9%	↑
Weather	53.4	49.1	↓
Business/Meeting/Conference	40.1	37.0	↓
Previous Experience	33.9	34.6	↑
Relaxing	37.7	33.6	↓
Restaurants	28.6	28.1	↓
Outdoor Recreation/Nature	28.3	27.0	↓
Quality of Accommodations	25.0	25.7	↑
Recommendation	22.3	24.7	↑
Quiet/Peaceful/Laid Back	28.1	24.5	↓
Never Been	23.5	22.8	↓
Appealing Brochures/Websites	22.5	20.2	↓
Not Crowded	10.5	7.8	↓
Internet Use			
	February 2019	February 2020	
Use Internet to Obtain Travel Info for This Trip (% Yes)	95.5%	96.7%	↑
Book Reservations for Trip Online (%Yes)	77.3	77.7	↑

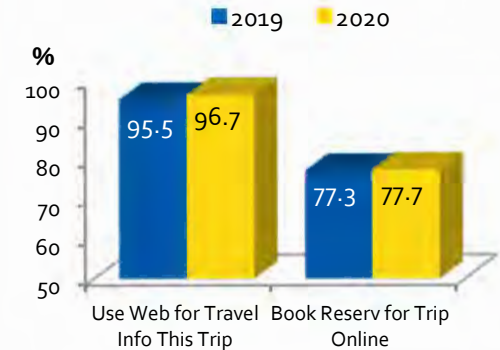
Seen/Read/Heard



Info. Influenced



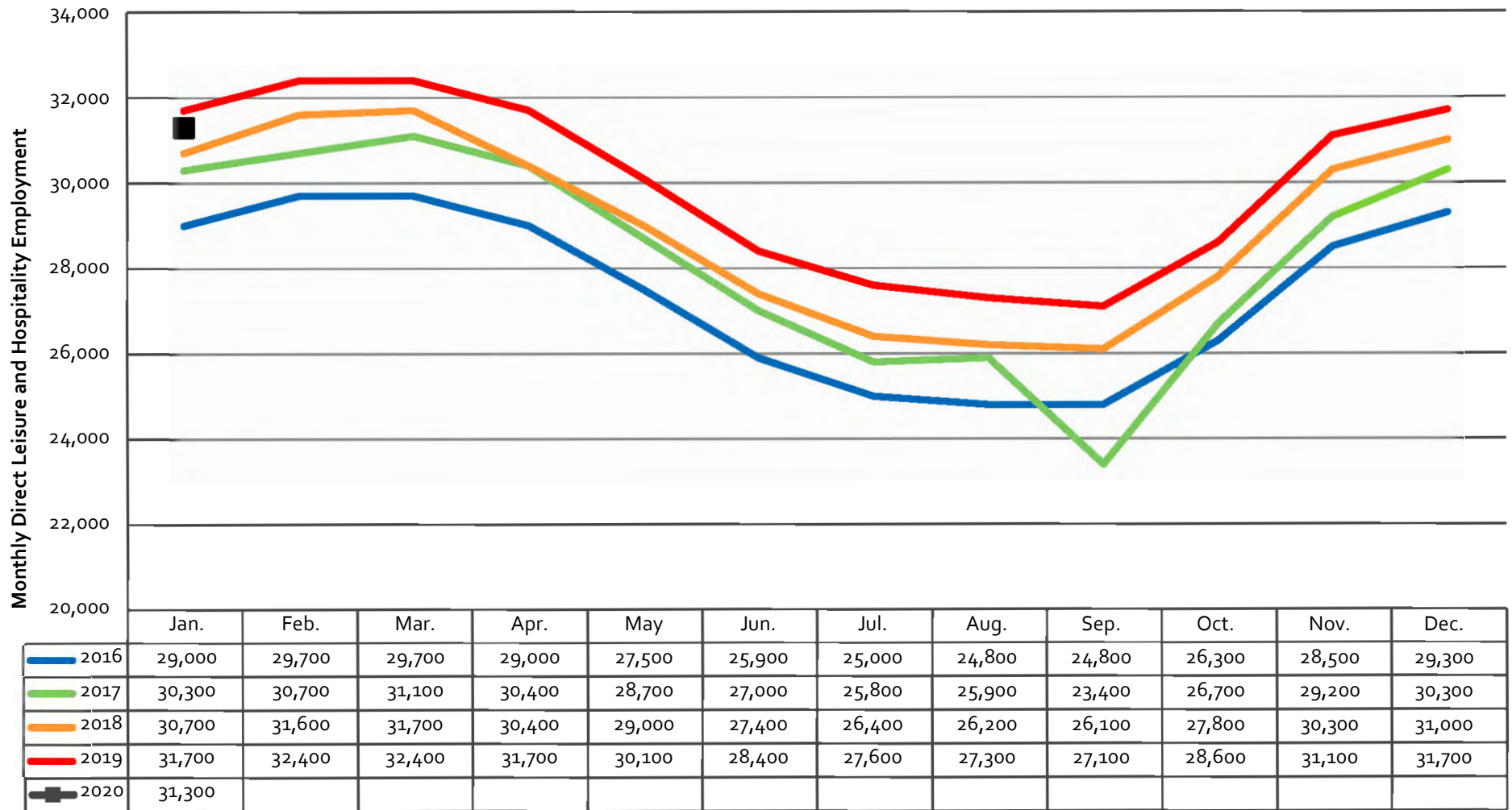
Internet Use



Industry Data:
2016 - 2020

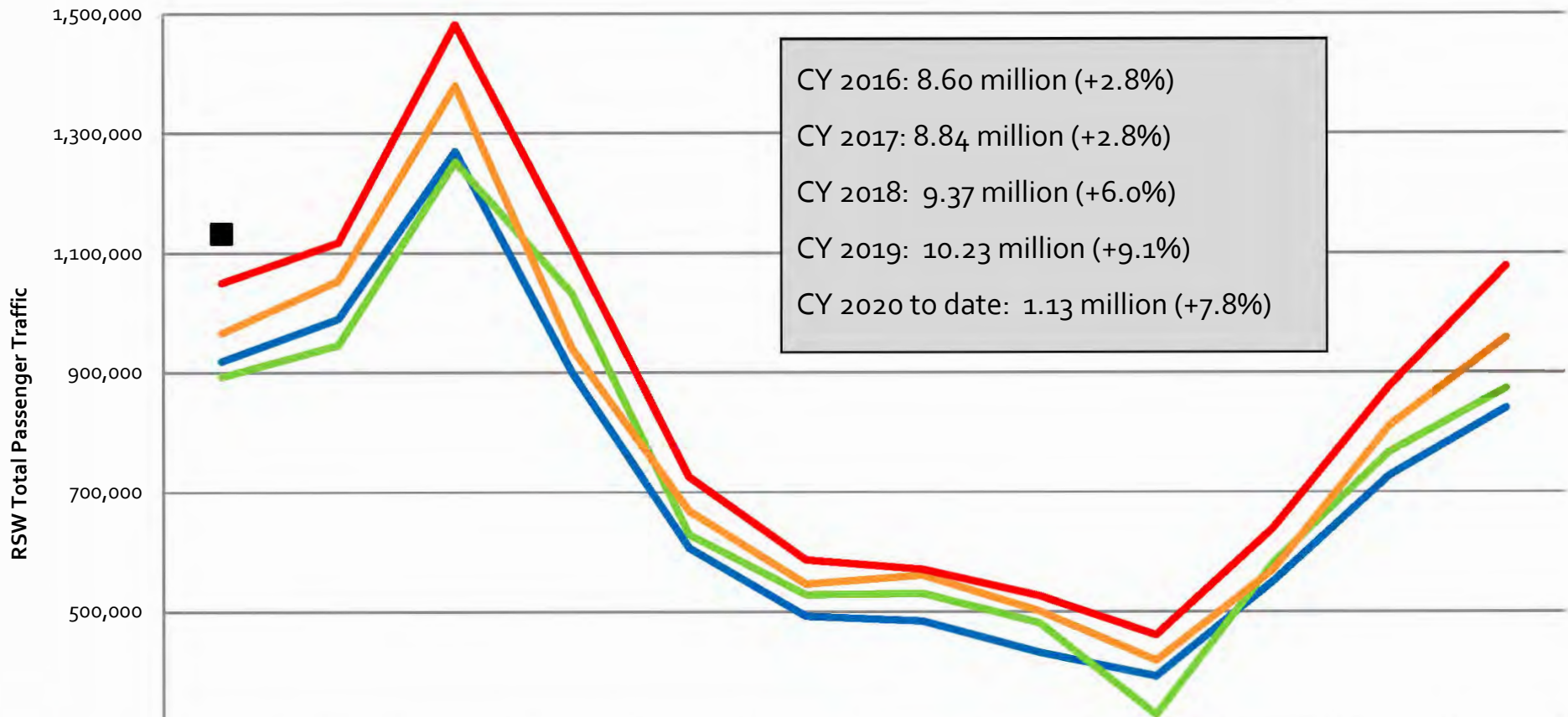


Collier Direct Leisure and Hospitality Employment (Calendar Year) *



* 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



	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											