



ds downs & st. germain
RESEARCH

NAPLES, MARCO ISLAND, EVERGLADES

CY2021 ECONOMIC IMPACT REPORT



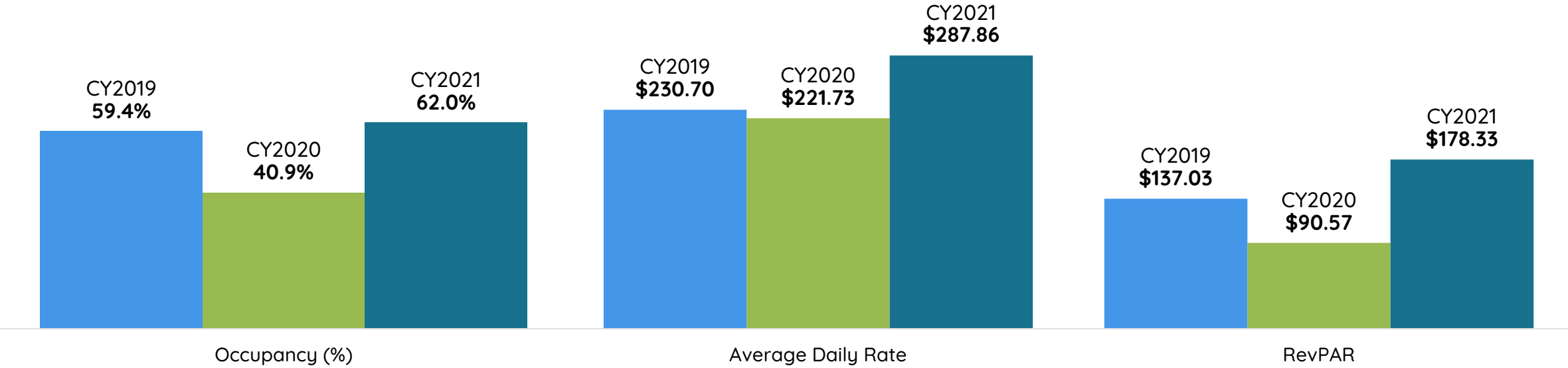
TOURISM PROGRESS REPORT

TOURISM PERFORMANCE METRICS



Tourism Progress Report

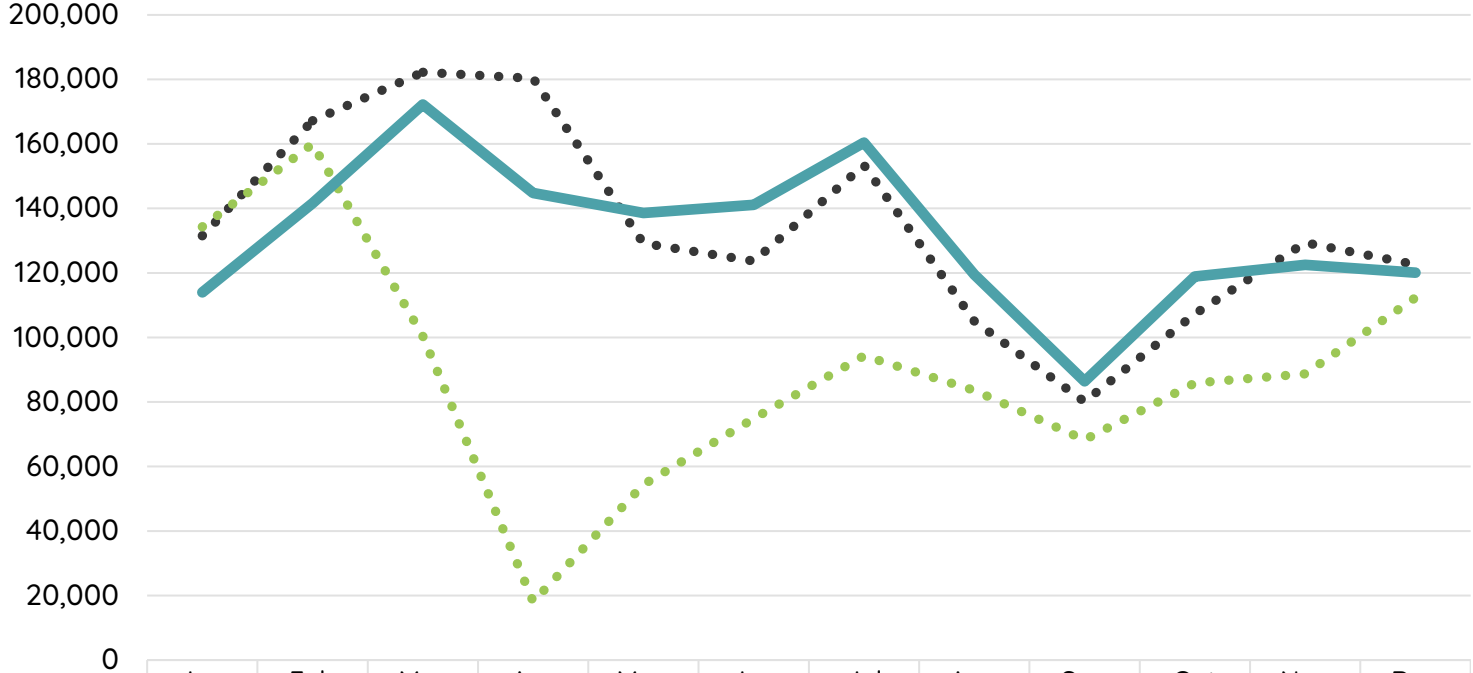
Lodging Metrics



	CY2019	CY2020	CY2021	% Change from 2019	% Change from 2020
Occupancy Rate	59.4%	40.9%	62.0%	+ 4.4%	+ 51.6%
Average Daily Rate	\$ 230.70	\$ 221.73	\$ 287.86	+ 24.8%	+ 29.8%
RevPAR	\$137.03	\$ 90.57	\$178.33	+ 30.1%	+ 96.9%

Tourism Progress Report

Overnight Visitors

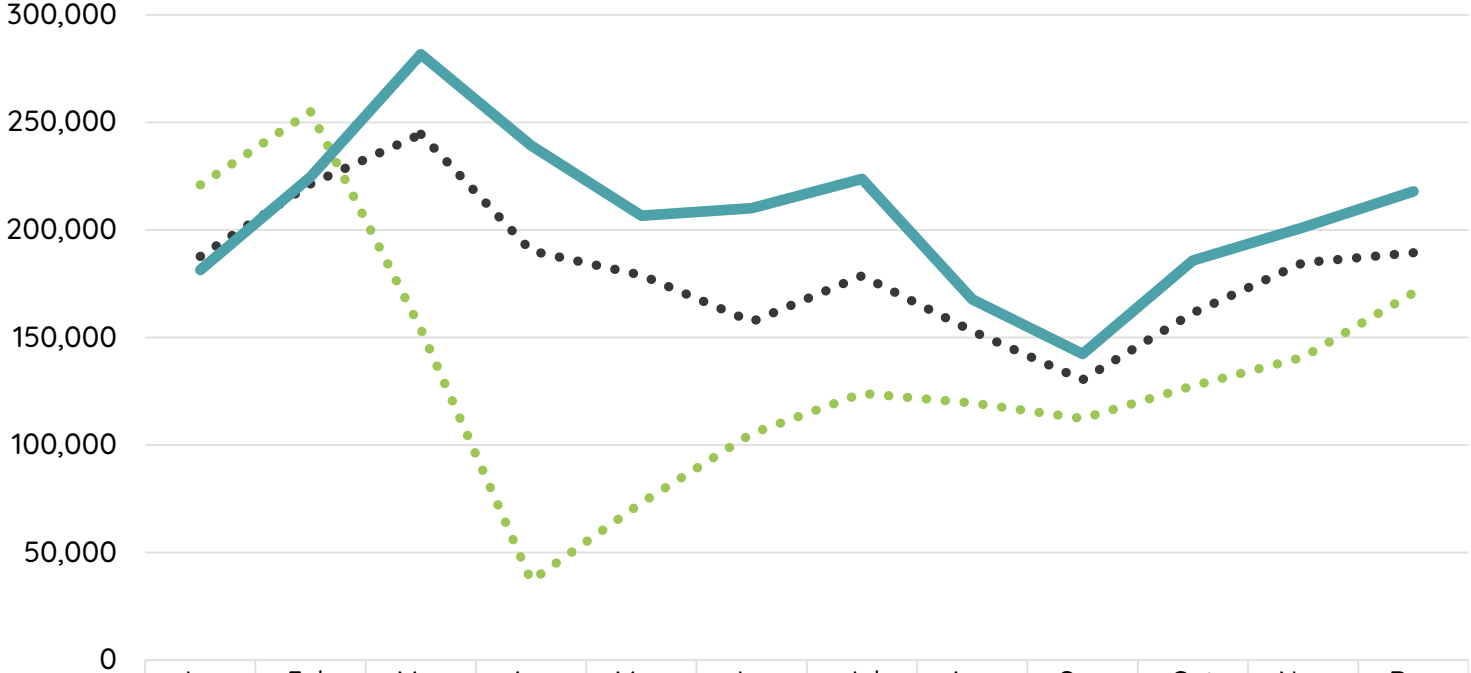


	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
•••• 2019	131,500	167,200	182,200	180,300	129,200	123,700	153,400	105,100	80,100	107,300	129,400	122,600
•••• 2020	134,300	160,000	100,300	18,100	54,400	74,900	94,300	83,600	68,300	85,900	88,700	112,300
— 2021	114,000	141,600	172,200	144,800	138,600	141,100	160,400	119,500	86,400	118,900	122,500	120,100

CY-21 | **1,580,100**
 - 2.0% from '19
 + 47.0% from '20

Tourism Progress Report

Room Nights

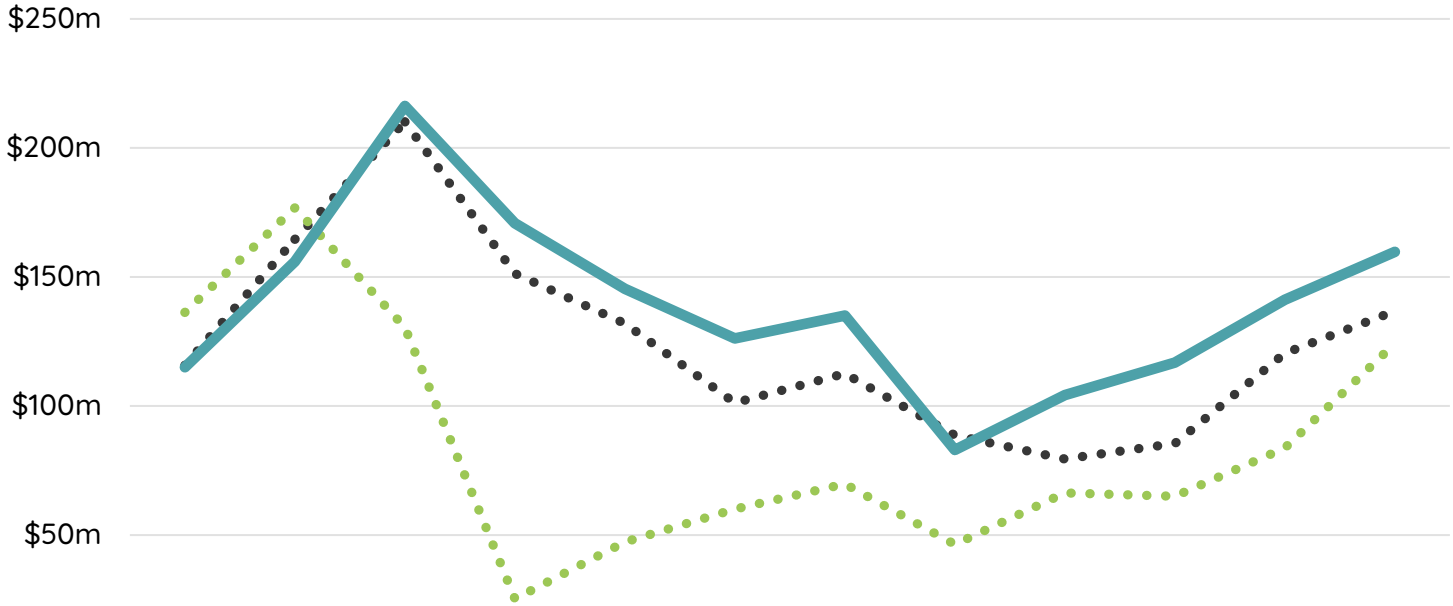


CY-21 | **2,482,400**
 + 14.0% from '19
 + 51.4% from '20

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
•••• 2019	187,700	221,400	244,500	190,300	179,000	157,300	178,700	152,900	130,300	161,400	184,800	189,400
•••• 2020	220,900	255,000	153,800	36,900	73,100	105,300	124,000	119,500	112,300	127,500	140,800	170,700
— 2021	181,400	224,700	281,700	239,300	206,600	210,100	223,700	167,700	142,300	185,800	201,200	217,900

Tourism Progress Report

Direct Spending



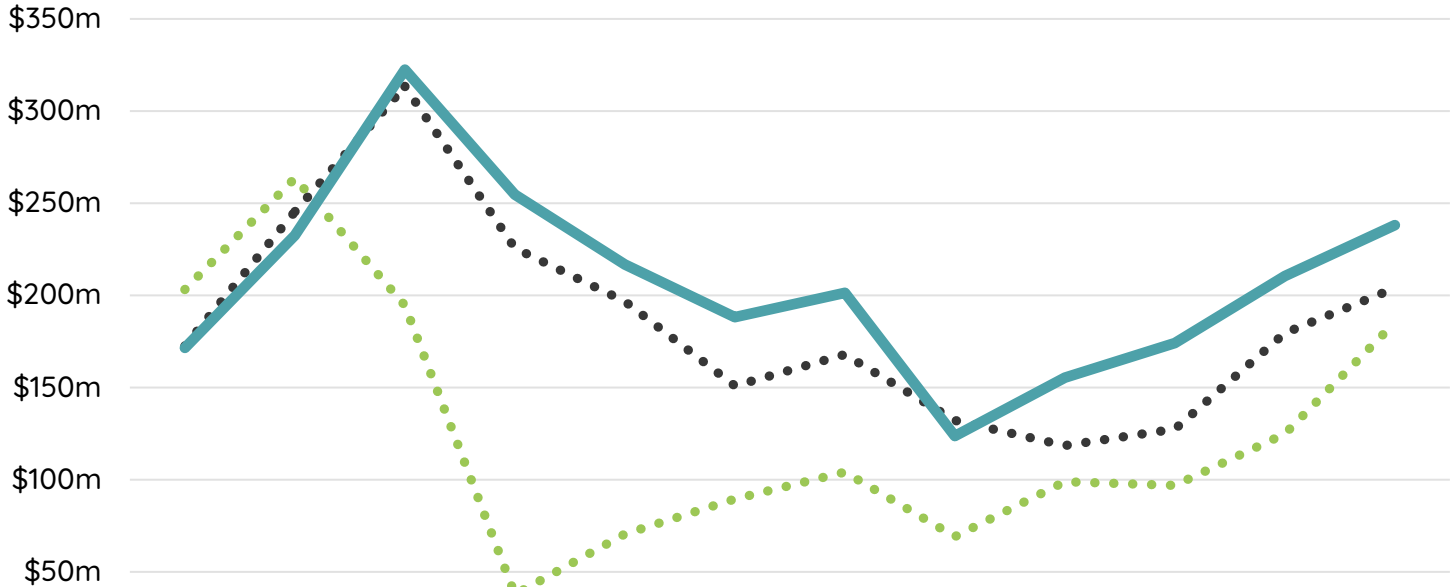
\$m	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
•••• 2019	\$115.7m	\$164.6m	\$210.2m	\$151.3m	\$132.0m	\$101.2m	\$112.6m	\$88.6m	\$79.5m	\$85.5m	\$120.4m	\$136.8m
•••• 2020	\$136.2m	\$176.8m	\$130.5m	\$25.3m	\$47.3m	\$60.0m	\$69.8m	\$46.4m	\$66.3m	\$65.0m	\$83.8m	\$124.2m
— 2021	\$115.0m	\$156.0m	\$216.3m	\$170.8m	\$145.4m	\$126.2m	\$135.1m	\$83.0m	\$104.2m	\$116.8m	\$141.2m	\$159.7m

CY-21 | **\$1,669,566,000**

+ 11.4% from '19
+ 61.8% from '20

Tourism Progress Report

Economic Impact



CY-21 | **\$2,489,322,900**

+ 11.4% from '19
+ 61.8% from '20

\$m	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
•••• 2019	\$172.5m	\$245.4m	\$313.4m	\$225.6m	\$196.8m	\$150.9m	\$167.9m	\$132.1m	\$118.5m	\$127.5m	\$179.6m	\$203.9m
•••• 2020	\$203.1m	\$263.6m	\$194.5m	\$37.7m	\$70.5m	\$89.5m	\$104.1m	\$69.1m	\$98.9m	\$96.9m	\$124.9m	\$185.2m
— 2021	\$171.5m	\$232.5m	\$322.5m	\$254.7m	\$216.7m	\$188.1m	\$201.4m	\$123.7m	\$155.4m	\$174.1m	\$210.5m	\$238.1m

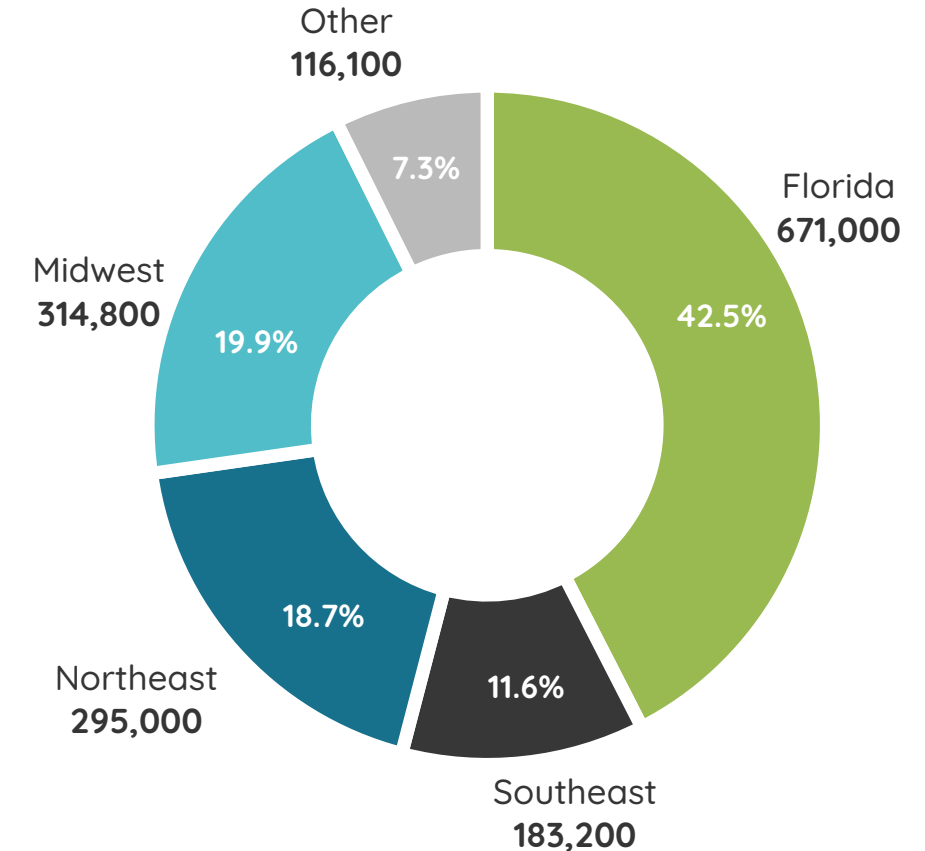
Tourism Progress Report

CY2021 Visitor Origin

Region	CY2020		CY2021		Percent Change ($\Delta\%$)	
	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	597,200	55.5%	671,000	42.5%	+ 12.4%	- 23.6%
Southeast	67,700	6.3%	183,200	11.6%	+ 170.6%	+ 84.1%
Northeast	166,000	15.4%	295,000	18.7%	+ 77.7%	+ 20.9%
Midwest	128,200	11.9%	314,800	19.9%	+ 145.6%	+ 67.1%
West ¹	0	0.0%	48,000	3.0%	-	-
Canada ²	10,500	1.0%	25,900	1.6%	+ 146.7%	+ 67.8%
Europe ²	45,900	4.3%	21,500	1.4%	- 53.2%	- 68.1%
C/S America ²	0	0.0%	14,500	0.9%	-	-
Other	59,600	5.5%	6,200	0.4%	+ 89.6%	- 92.9%
Total	1,075,100	100.0%	1,580,100	100.0%		

¹Visitation from western U.S. states not separated from "other" category in CY2020.

²Visitation from international markets were not reported for most of 2020 and 2021.



Tourism Progress Report

Performance Indicators

Performance Indicators	CY2019	CY2020	CY2021	Δ% from CY2019	Δ% from CY2020
Jobs supported	20,253	13,604	21,800	+ 7.6%	+ 60.2%
Wages supported	\$818,120,700	\$564,467,200	\$913,446,000	+ 11.7%	+ 61.8%
State & local taxes generated	\$166,927,300	\$115,255,900	\$186,825,000	+ 11.9%	+ 62.1%
Taxes savings per local household	\$1,167	\$806	\$1,307	+ 12.0%	+ 62.2%



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TOURISM PROGRESS REPORT

QUARTERLY VISITOR STATISTICS

Tourism Progress Report

Quarterly Visitor Statistics

Reasons for Choosing Destination	Jan - Mar 2021	Apr - Jun 2021	Jul - Sep 2021	Oct - Dec 2021	CY2021
Beaches	55%	59%	61%	55%	57%
Previous experience	40%	38%	24%	36%	35%
Quiet/relaxing	23%	30%	34%	39%	31%
Quality of accommodations	29%	31%	29%	23%	28%
Restaurants	23%	27%	23%	29%	26%
Recommendation	25%	27%	25%	26%	25%
Appealing advertisements	32%	28%	24%	14%	25%
Not crowded	13%	23%	27%	20%	21%
Trying something new	11%	17%	14%	16%	14%
Meeting/event hosted here	8%	10%	13%	14%	11%
Friends/family live here	-	-	11%	27%	9%
Family-friendly destination	-	-	9%	27%	8%
Shopping	-	-	5%	21%	6%
Golf	-	-	5%	6%	3%
Other	-	-	4%	6%	2%

Tourism Progress Report

Quarterly Visitor Statistics

Reasons for Visiting	Jan - Mar 2021	Apr - Jun 2021	Jul - Sep 2021	Oct - Dec 2021	CY2021
Vacation/getaway	90%	89%	85%	67%	83%
Visit friends/family	13%	11%	20%	24%	16%
Special event	3%	6%	8%	3%	5%
Business	-	-	8%	9%	4%
Other	12%	13%	20%	4%	12%

Tourism Progress Report

Quarterly Visitor Statistics

Means of Transportation	Jan - Mar 2021	Apr - Jun 2021	Jul - Sep 2021	Oct - Dec 2021	CY2021
Fly/Plane	46%	37%	45%	42%	43%
Drive	54%	63%	55%	57%	57%
Bus	-	-	0%	1%	0%

Airports of Deplanement	Jan - Mar 2021	Apr - Jun 2021	Jul - Sep 2021	Oct - Dec 2021	CY2021
SWFL International Airport	37%	30%	34%	28%	31% ¹
Ft. Lauderdale International Airport	3%	1%	4%	6%	4%
Miami International Airport	2%	3%	2%	4%	3%
Punta Gorda Airport	-	1%	2%	0%	1%
Naples Airport	1%	1%	1%	1%	1%
Orlando International Airport	1%	-	1%	1%	1%
Tampa International Airport	1%	1%	1%	1%	1%
Palm Beach International Airport	-	-	0%	1%	0%

¹31% of all overnight visitors to Collier County visitors deplaned at Southwest Florida International Airport in CY2021.

Tourism Progress Report

Quarterly Visitor Statistics

Advertising	Jan - Mar 2021	Apr - Jun 2021	Jul - Sep 2021	Oct - Dec 2021	CY2021
Exposed to advertising	58%	56%	51%	39%	52%
Influenced by advertising	33%	31%	38%	13%	29% ¹

¹29% of all overnight visitors to Collier County visitors were influenced by advertising in CY2021.

Travel Party Composition	Jan - Mar 2021	Apr - Jun 2021	Jul - Sep 2021	Oct - Dec 2021	CY2021
Solo	4%	6%	8%	13%	8%
As a couple	61%	54%	43%	46%	52%
With family	28%	36%	38%	27%	32%
Other	7%	4%	11%	14%	9%

Travel Party Characteristics	Jan - Mar 2021	Apr - Jun 2021	Jul - Sep 2021	Oct - Dec 2021	CY2021
Average Party Size	2.6	2.6	3.1	3.0	2.8
1 st time visitors	35%	42%	39%	38%	38%

Tourism Progress Report

Quarterly Visitor Statistics

Visitor Profile	Jan - Mar 2021	Apr - Jun 2021	Jul - Sep 2021	Oct - Dec 2021	CY2021
Average Age	51.5	48.6	43.3	45.2	47.4
Median Household Income	\$170,600	\$149,500	\$133,400	\$143,200	\$149,700

Trip Activities	Jan - Mar 2021	Apr - Jun 2021	Jul - Sep 2021	Oct - Dec 2021	CY2021
Beach	80%	88%	82%	79%	82%
Dining out	65%	72%	68%	74%	70%
Shopping/antiquing	44%	37%	39%	48%	42%
Nature & parks	28%	36%	27%	33%	31%
Visit friends/family	16%	14%	17%	31%	19%
Visit local attractions	-	-	6%	27%	7%
Sightseeing/touring	17%	26%	28%	26%	24%
Bars/nightlife	12%	19%	17%	19%	17%
Everglades tour	-	-	5%	14%	4%
Art galleries/shows	6%	7%	7%	10%	7%
Spas	-	-	4%	6%	2%
Business/meeting	-	-	4%	5%	2%
Gambling	-	-	3%	3%	1%
Other	-	-	1%	4%	1%

Tourism Progress Report

Quarterly Visitor Statistics

Visitor Spending	Jan - Mar 2021	Apr - Jun 2021	Jul - Sep 2021	Oct - Dec 2021	CY2021
Total Travel Party Spending	\$2,366	\$2,510	\$2,318	\$3,393	\$2,626
Travel Party Spending per Day	\$565	\$620	\$521	\$676	\$595
Visitor Spending per Trip	\$910	\$960	\$765	\$1,137	\$941
Visitor Spending per Day	\$218	\$237	\$173	\$227	\$215

NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau CY2021 Economic Impact Report

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