

RESEARCH DATA SERVICES, INC.

4520 WEST OAKELLAR AVENUE • #13169
TAMPA, FLORIDA 33611
TEL (813) 254-2975 • FAX (813) 223-2986



Naples, Marco Island, Everglades Convention and Visitors Bureau

March 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

April 2020

Naples, Marco Island, Everglades: March 2020 Summary

Executive Summary: March 2020

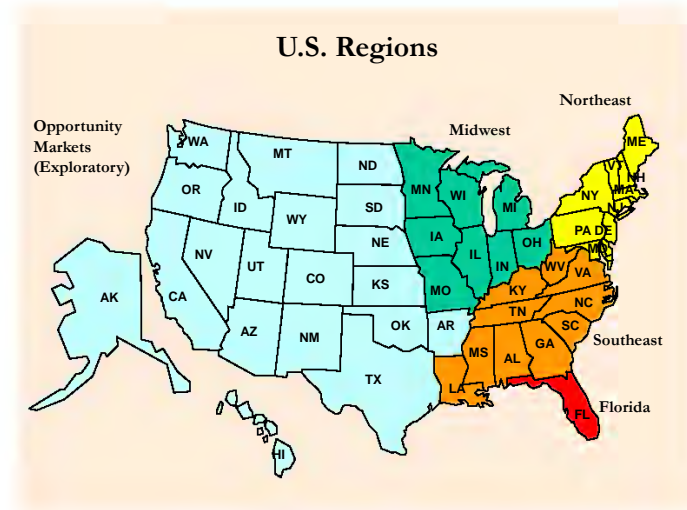
- Due to the impacts of travel bans and stay-at-home orders related to the COVID-19 crisis, Collier experienced a significant contraction of its March business. This March, some **142,400** visitors stayed in Collier's commercial lodgings (-41.4%)*. Their visits contributed an estimated **\$188,783,000** of economic impact to the County (-48.9%). Key industry metrics are as follows:

<u>March</u>	<u>2019</u>	<u>2020*</u>	<u>% Δ</u>
Occupancy	91.6%	49.4%	-46.1 %
ADR	\$359.90	\$342.11	-4.9%
RevPAR	\$329.70	\$169.00	-48.7%

* According to the Florida Department of Business and Professional Regulation (DBPR), Collier transient lodging inventory has grown by 854 units (+8.5%) since March of 2019. (2019: 10,026; 2020: 10,880)

- Collier's March visitation experienced greater contractions from the destination's more remote feeder markets:

<u>March Visitation</u>	<u>2020</u> <u>Visitor #</u>	<u>Δ</u>
Florida	42,720	-22.6
Southeast	10,110	-28.3
Northeast	41,866	-40.0
Midwest	23,638	-55.4
Canada	3,275	-51.9
Europe	14,098	-58.9
Other	6,693	-32.8
Total	142,400	-41.4



Naples, Marco Island, Everglades: March 2020 Summary

3. This March saw a significant contraction in the proportion of visitor parties who flew (2019: 76.3%; 2020: 66.0%). A majority of those parties who used air transport (68.9%) deplaned at RSW, with Miami capturing some 9.2% of deplanements.
4. This March, both visitor party size and length of stay contracted notably (Party Size: 2019: 2.7 people; 2020: 2.4 people; Length of Stay: 2019: 3.3 nights; 2020: 2.8 nights).
5. Some 36.0% of Collier's March visitors were in the destination for the first time.
6. Fully 96.3% consulted the web for trip information, with some 82.3% making bookings for their trip online.
7. The majority (93.2%) are satisfied with their Collier stay, with 91.2% planning a future trip to the area.
8. The typical March 2020 visitor was significantly younger than their 2019 counterpart (2019: 52.9 years; 2020: 49.7 years of age).

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

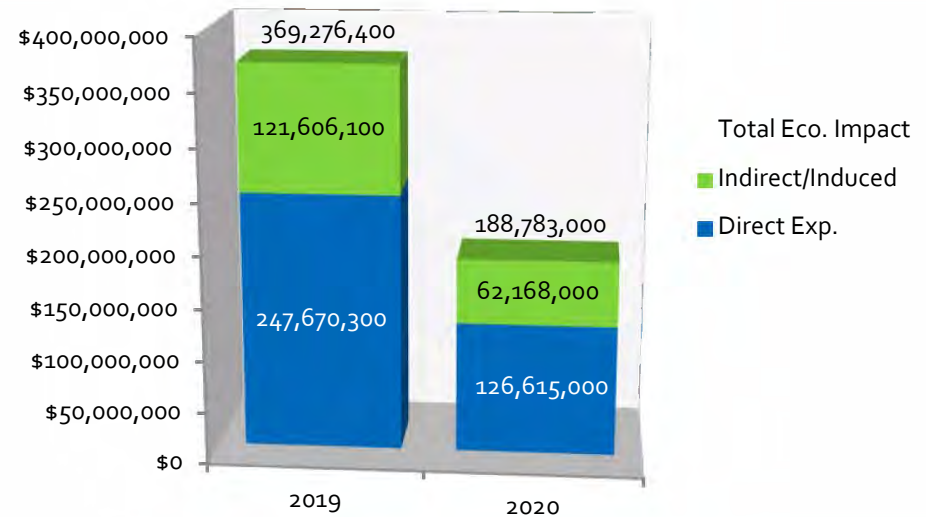
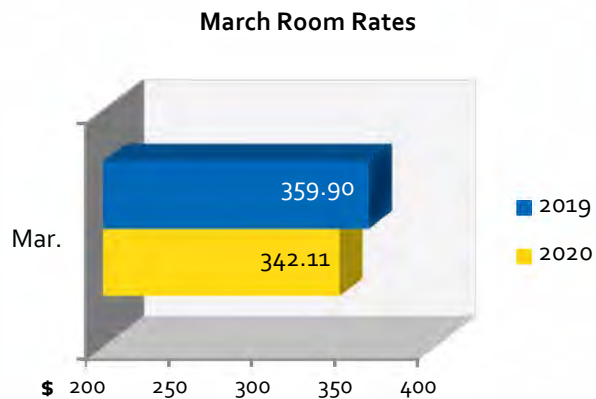
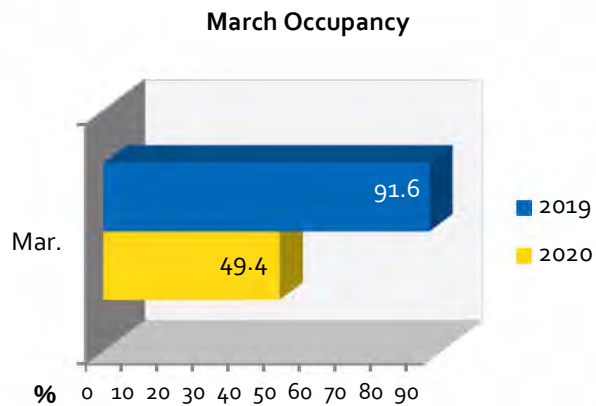


Naples, Marco Island, Everglades Visitor Profile March 2020

H/M/C+ Visitor Statistics	Year to Date (January – March)			March		
	2019	2020	% Δ '19/'20	2019	2020	% Δ '19/'20
Visitors (#)	645,400	572,200	-11.3	243,100	142,400	-41.4
Room Nights	782,400	714,600	-8.7	284,000	166,200	-41.5
Direct Exp. (\$)	\$573,623,300	\$491,909,300	-14.2	\$247,670,300	\$126,615,000	-48.9
Total Eco. Impact (\$)	\$855,272,300	\$733,436,800	-14.2	\$369,276,400	\$188,783,000	-48.9

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

March Economic Impact



March

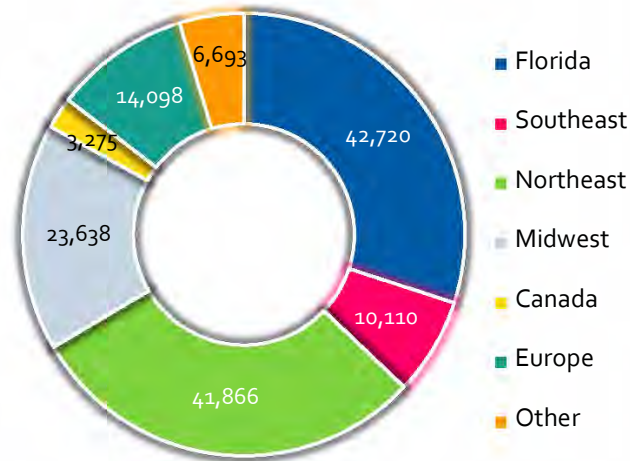
Lodging Statistics	2019	2020*	% Δ '19/'20
Occupancy	91.6%	49.4%	-46.1
Room Rates	\$359.90	\$342.11	-4.9
RevPAR	\$329.70	\$169.00	-48.7

* According to the Florida Department of Business and Professional Regulation (DBPR), Collier transient lodging inventory has grown by 854 units (+8.5%) since March of 2019. (2019: 10,026; 2020: 10,880)

March 2020 Visitor Origin Markets

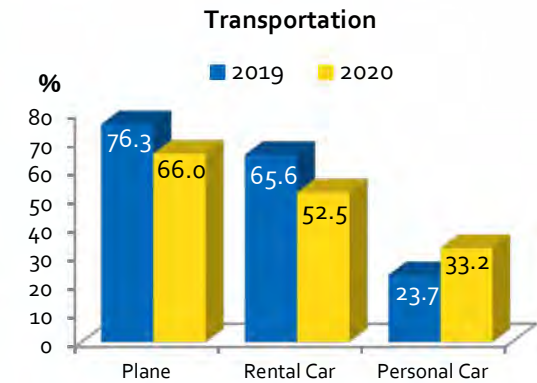
Visitor Origins	2019		2020		% Δ '19/'20
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	22.7%	55,183	30.0%	42,720	-22.6
Southeast	5.8	14,100	7.1	10,110	-28.3
Northeast	28.7	69,770	29.4	41,866	-40.0
Midwest	21.8	52,996	16.6	23,638	-55.4
Canada	2.8	6,807	2.3	3,275	-51.9
Europe	14.1	34,277	9.9	14,098	-58.9
Other	4.1	9,967	4.7	6,693	-32.8
Total	100.0	243,100	100.0	142,400	-41.4

March 2020 Visitor Origins



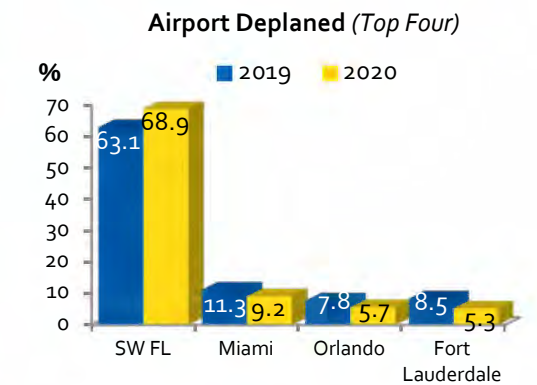
Transportation Mode (Multiple Response)

	March 2019	March 2020	
Plane	76.3%	66.0%	↓
Rental Car	65.6	52.5	↓
Personal Car	23.7	33.2	↑



Airport Deplened (Base: Flew)

	March 2019	March 2020	
Southwest Florida International	63.1%	68.9%	↑
Miami International	11.3	9.2	↓
Orlando International/Sanford	7.8	5.7	↓
Ft. Lauderdale International	8.5	5.3	↓
Tampa International	4.8	3.4	↓



Purpose of Trip (Multiple Response)

	March 2019	March 2020	
Vacation/Weekend Getaway	83.6%	88.4%	↑
Group Travel	25.9	21.0	↓
Visit with Friends and Relatives	12.0	18.1	↑
Special Event	5.7	1.9	↓

First Visit to (% yes)

	March 2019	March 2020	
Collier County	41.8%	36.0%	↓
Florida	3.6	2.6	↓

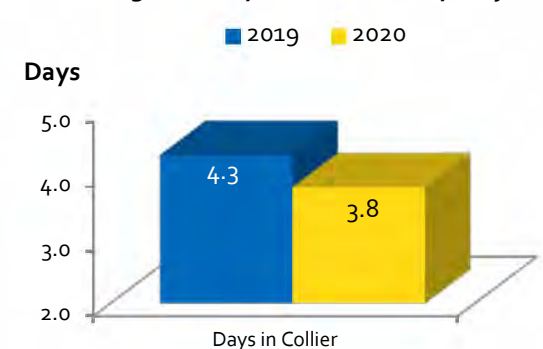
Length of Stay (Days)

	March 2019	March 2020	
In Collier County	4.3	3.8	↓

Party Size

	March 2019	March 2020	
Number of People	2.7	2.4	↓

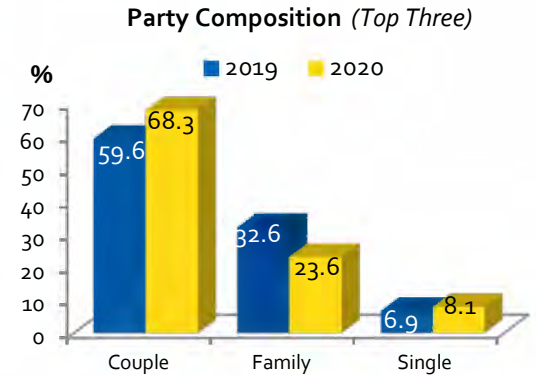
Length of Stay in Collier County (Days)



Naples, Marco Island, Everglades Visitor Profile | March 2020

Party Composition (Multiple Response)

	March 2019	March 2020	
Couple	59.6%	68.3%	↑
Family	32.6	23.6	↓
Single	6.9	8.1	↑
Group of Friends	4.3	2.4	↓

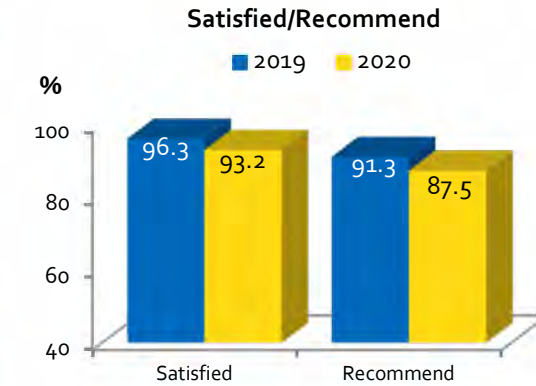


Did Party Have Lodging Reservations for Stay

	March 2019	March 2020	
% Yes	98.6%	98.8%	↑

Expense Relative to Expectations

	March 2019	March 2020	
More Expensive	22.8%	19.4%	↓
Less Expensive	2.9	3.5	↑
As Expected	71.5	75.1	↑

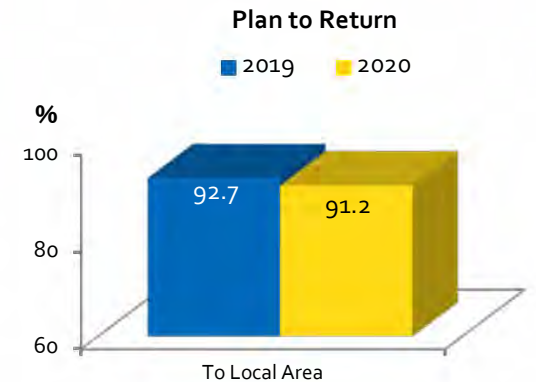


Satisfaction with Collier County

	March 2019	March 2020	
Very Satisfied	84.4%	67.2%	↓
Satisfied	11.9	26.0	↑
Satisfaction Level (Combined)	96.3%	93.2%	↓

Recommend Collier to Friends/Relatives

	March 2019	March 2020	
% Yes	91.3%	87.5%	↓



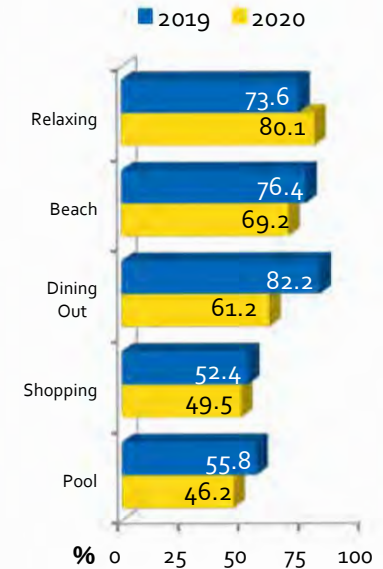
Plan to Return (% Yes)

	March 2019	March 2020	
To Local Area	92.7%	91.2%	↓

Activities Enjoyed in Area (Multiple Response)

	March 2019	March 2020	
Relaxing	73.6%	80.1%	↑
Beach	76.4	69.2	↓
Dining Out	82.2	61.2	↓
Shopping	52.4	49.5	↓
Pool	55.8	46.2	↓
Sunsets	27.2	40.9	↑
Reading	31.9	28.0	↓
Enjoying Nature/Bird Watching/Everglades	27.8	26.2	↓
Swimming	31.2	25.4	↓
Sightseeing	29.1	22.4	↓
Visiting with Friends/Relatives	17.1	22.2	↑
Walking	27.6	21.1	↓
Bars/Nightlife	24.4	18.4	↓
Sunning	22.4	17.6	↓
Boating	--	16.9	—
Fishing	--	11.2	—
Golfing	8.0	10.9	↑
Art Galleries/Shows/Fairs	16.3	10.8	↓
Shelling	14.3	10.1	↓

Activities Enjoyed in Area (Top Five)



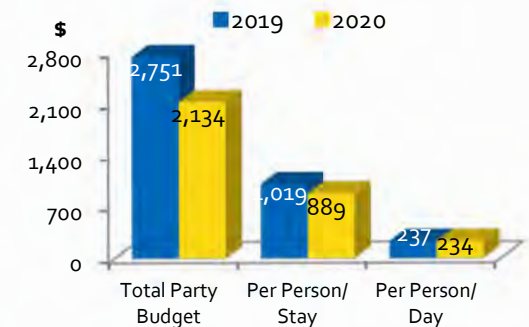
Demographics

	March 2019	March 2020	
Average Age Head of Household (Years)	52.9	49.7	↓
Median Annual Household Income	\$179,814	\$180,854	↑

Collier Base Budget

	March 2019	March 2020	
Total	\$2,750.77	\$2,133.96	↓
Per Person/Stay	1,018.80	889.15	↓
Per Person/Day	236.93	233.99	↓

Collier Base Budgets



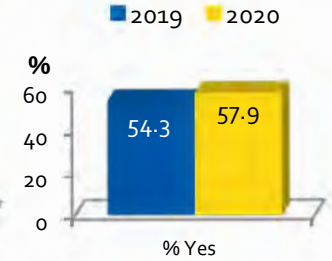
Naples, Marco Island, Everglades Visitor Profile | March 2020

Area Information Seen/Read/Heard	March 2019	March 2020	
% Yes	52.1%	48.6%	↓
Directly Influenced by Information (Base: Seen/Read/Heard Area Information)			
	March 2019	March 2020	
% Yes	54.3%	57.9%	↑
Why Chose the Area (Multiple Response)			
	March 2019	March 2020	
Beach Area	53.0%	53.4%	↑
Weather	51.4	52.6	↑
Previous Experience	37.9	45.9	↑
Relaxing	30.4	30.8	↑
Appealing Brochures/Websites	27.1	30.4	↑
Restaurants	29.6	30.0	↑
Quality of Accommodations	28.3	28.8	↑
Recommendation	23.5	25.3	↑
Quiet/Peaceful/Laid Back	25.6	23.7	↓
Outdoor Recreation/Nature	26.1	22.1	↓
Business/Meeting/Conference	24.3	19.2	↓
Never Been	21.0	14.8	↓
Not Crowded	12.7	10.0	↓
Internet Use			
	March 2019	March 2020	
Use Internet to Obtain Travel Info for This Trip (% Yes)	93.7%	96.3%	↑
Book Reservations for Trip Online (%Yes)	78.2	82.3	↑

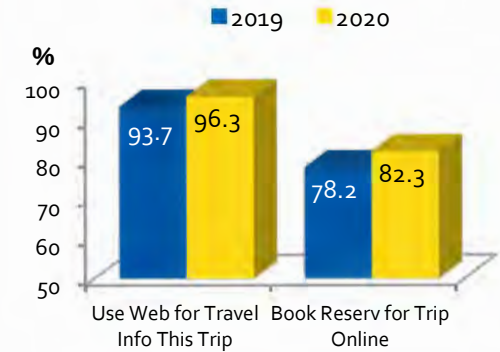
Seen/Read/Heard



Info. Influenced



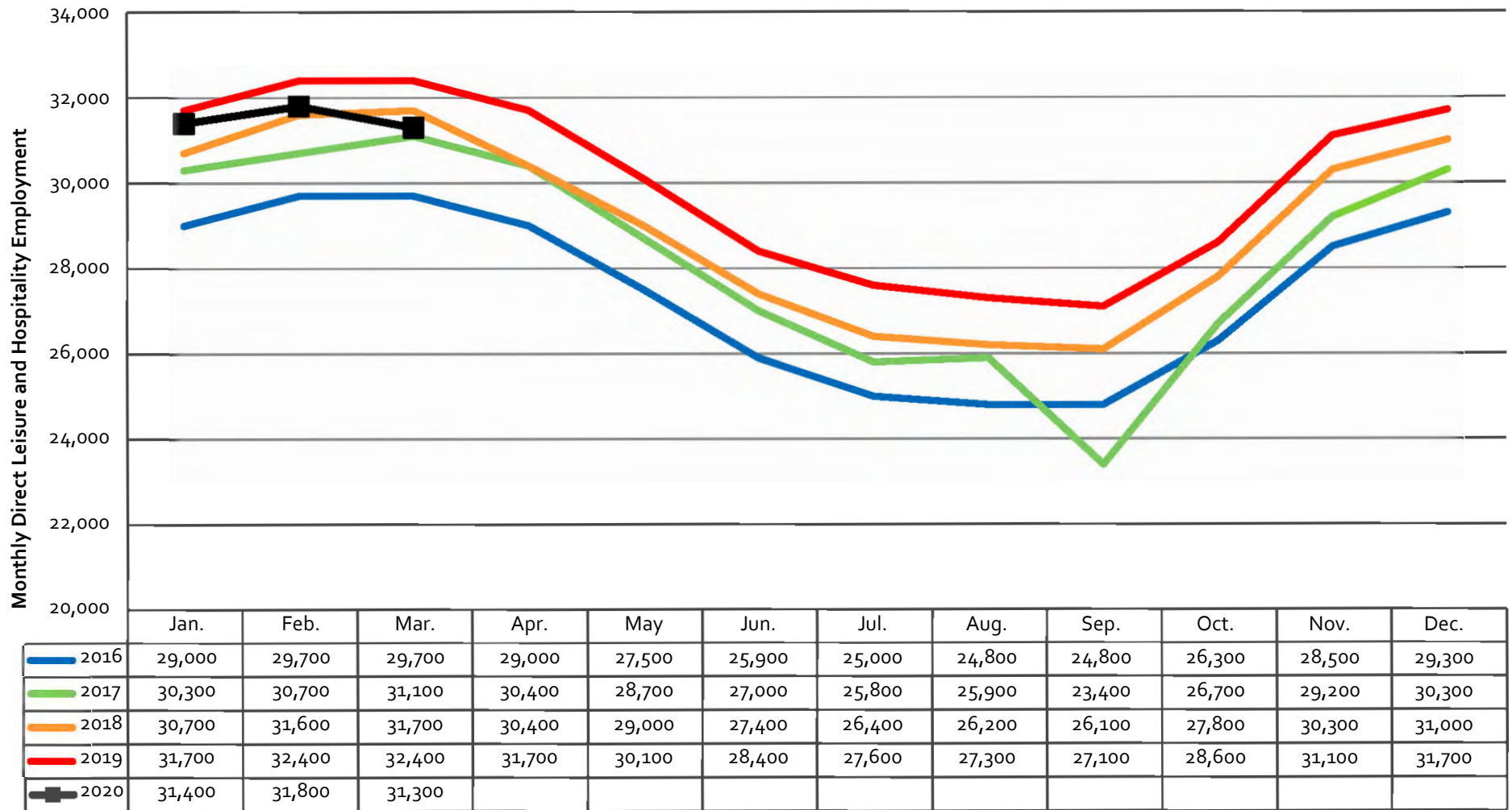
Internet Use



Industry Data: *2016 - 2020*

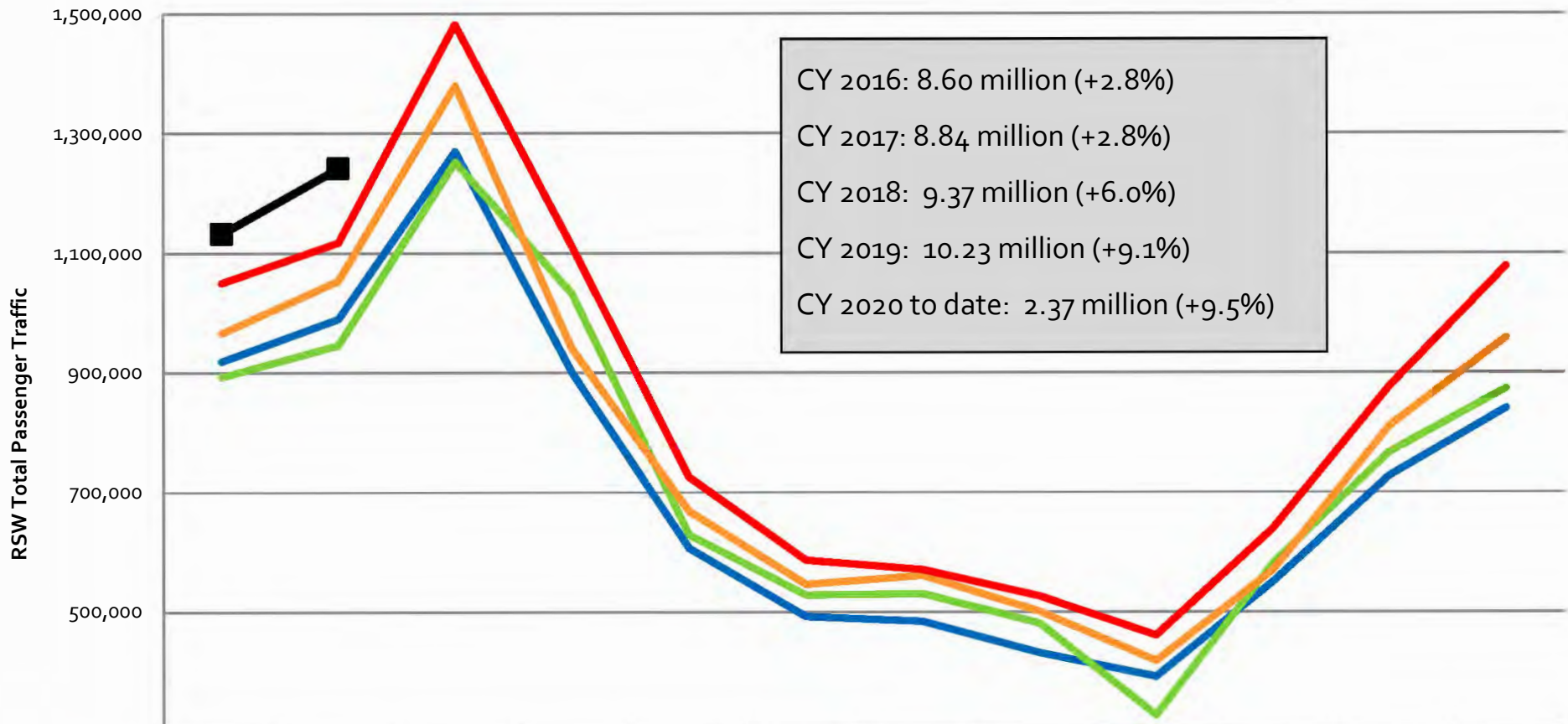


Collier Direct Leisure and Hospitality Employment (Calendar Year) *



* 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	1,241,590										