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Naples, Marco Island, Everglades Convention and Visitors Bureau May 2021 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

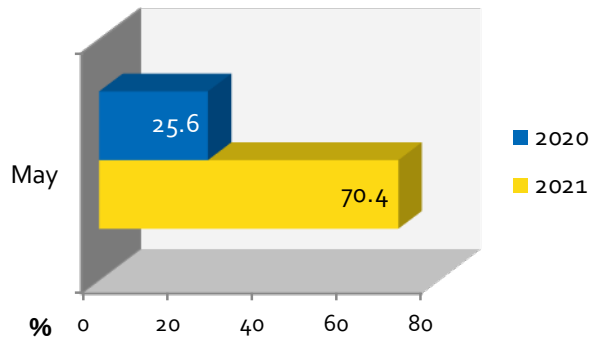
June 2021

Naples, Marco Island, Everglades Visitor Profile May 2021

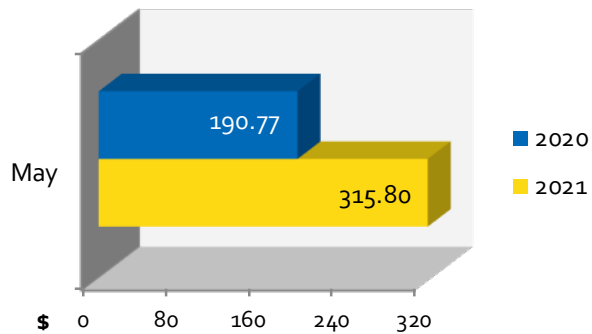
H/M/C+ Visitor Statistics	Year to Date (January – May)			May		
	2020	2021	% Δ '20/'21	2020	2021	% Δ '20/'21
Visitors (#)	633,000	893,600	+41.2	49,300	150,100	+204.5
Room Nights	821,300	1,197,100	+45.8	79,600	219,600	+175.9
Direct Exp. (\$)	\$543,067,100	\$886,799,500	+63.3	\$41,913,900	\$159,242,600	+279.9
Total Eco. Impact (\$)	\$809,713,100	\$1,322,218,100	+63.3	\$62,493,600	\$237,430,700	+279.9

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

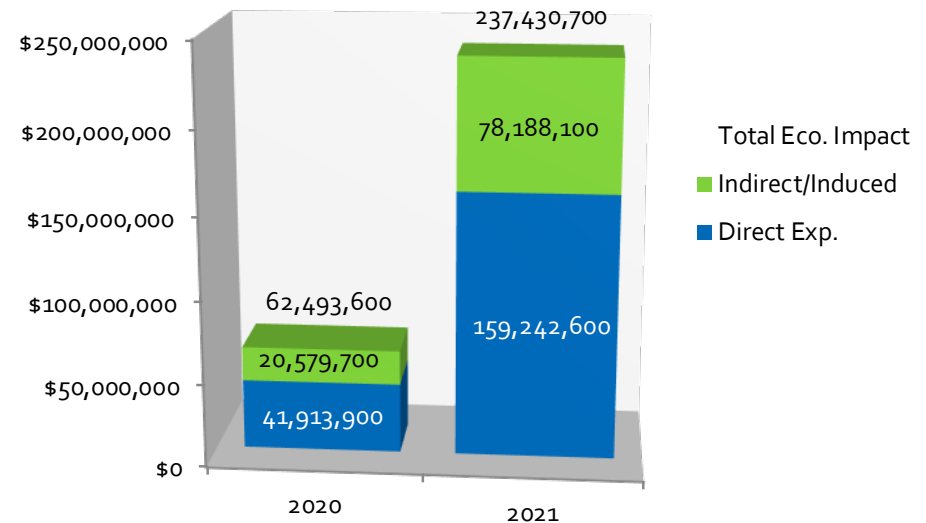
May Occupancy



May Room Rates



May Economic Impact



May

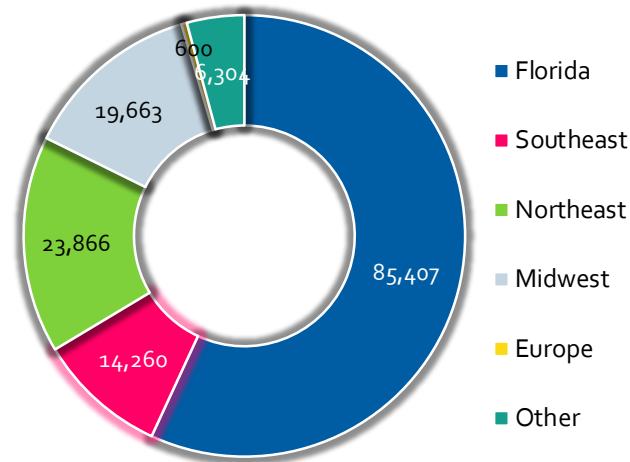
Lodging Statistics	2020	2021	% Δ '20/'21
Occupancy	25.6%	70.4%	+175.0
Room Rates	\$190.77	\$315.80	+65.5
RevPAR	\$48.84	\$222.32	+355.2

May 2021 Visitor Origin Markets

Visitor Origins	2020		2021		% Δ '20/'21
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	87.5%	43,137	56.9%	85,407	+ 98.0
Southeast	2.0	986	9.5	14,260	+1,346.2
Northeast	4.2	2,071	15.9	23,866	+1,052.4
Midwest	3.3	1,627	13.1	19,663	+1,108.5
Canada*	0.0	0	0.0	0	n/a
Europe*	0.0	0	0.4	600	n/a
Other	3.0	1,479	4.2	6,304	+326.2
Total	100.0	49,300	100.0	150,100	+204.5

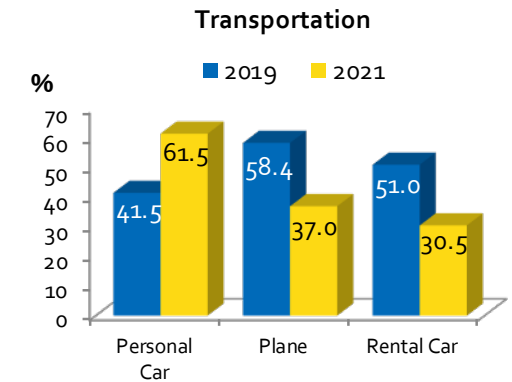
* May 2020 and 2021 Canadian visitation was too small to measure. May 2020 European visitation was too small to measure.

May 2021 Visitor Origins

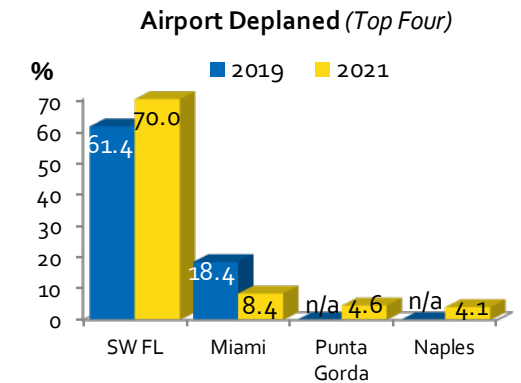


Naples, Marco Island, Everglades Visitor Profile | May 2021

Transportation Mode (Multiple Response)	May 2019	May 2021	
Personal Car	41.5%	61.5%	↑
Plane	58.4	37.0	↓
Rental Car	51.0	30.5	↓

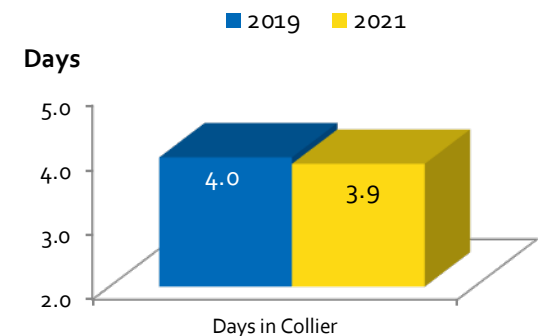


Airport Deplened (Base: Flew)	May 2019	May 2021	
Southwest Florida International	61.4%	70.0%	↑
Miami International	18.4	8.4	↓
Punta Gorda Airport	n/a	4.6	—
Naples Airport	n/a	4.1	—
Tampa International	2.7	4.0	↑
Ft. Lauderdale International	7.5	2.5	↓
Orlando International/Sanford	6.0	1.3	↓



Purpose of Trip (Multiple Response)	May 2019	May 2021	
Vacation/Weekend Getaway	84.3%	88.2%	↑
Group Travel	29.1	10.6	↓
Visit with Friends and Relatives	10.2	7.3	↓
Special Event	n/a	5.1	—

Length of Stay in Collier County (Days)



First Visit to (% yes)	May 2019	May 2021	
Collier County	48.7%	45.9%	↓
Florida	6.0	5.0	↓

Length of Stay (Days)	May 2019	May 2021	
In Collier County	4.0	3.9	↓

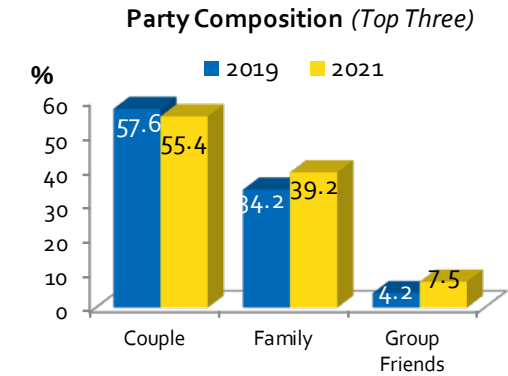
Party Size	May 2019	May 2021	
Number of People	2.5	2.6	↑

Due to travel restrictions imposed in response to the COVID-19 crisis and the atypical nature of visitation, a full profile for the month of May 2020 was neither feasible nor meaningful.

Naples, Marco Island, Everglades Visitor Profile | May 2021

Party Composition (Multiple Response)

	May 2019	May 2021	
Couple	57.6%	55.4%	↓
Family	34.2	39.2	↑
Group of Friends	4.2	7.5	↑
Single	10.3	5.7	↓

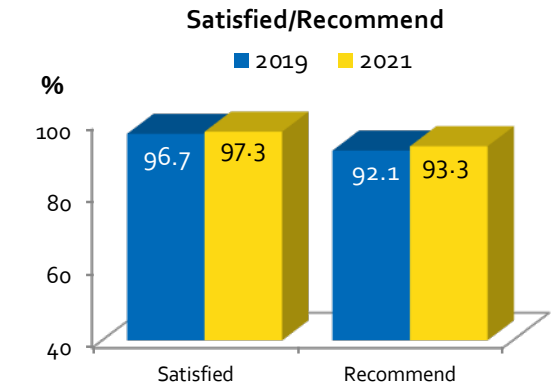


Did Party Have Lodging Reservations for Stay

	May 2019	May 2021	
% Yes	94.9%	96.0%	↑

Expense Relative to Expectations

	May 2019	May 2021	
More Expensive	14.7%	20.7%	↑
Less Expensive	3.3	3.0	↓
As Expected	78.6	73.6	↓

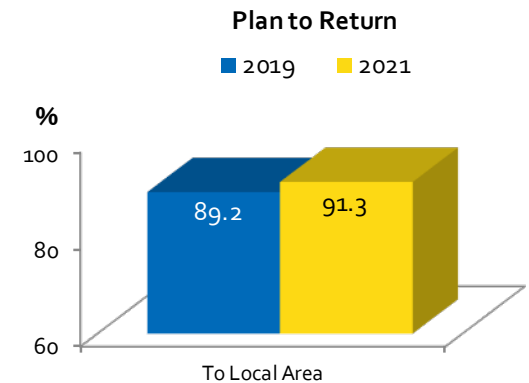


Satisfaction with Collier County

	May 2019	May 2021	
Very Satisfied	88.7%	85.1%	↓
Satisfied	8.0	12.2	↑
Satisfaction Level (Combined)	96.7%	97.3%	↑

Recommend Collier to Friends/Relatives

	May 2019	May 2021	
% Yes	92.1%	93.3%	↑



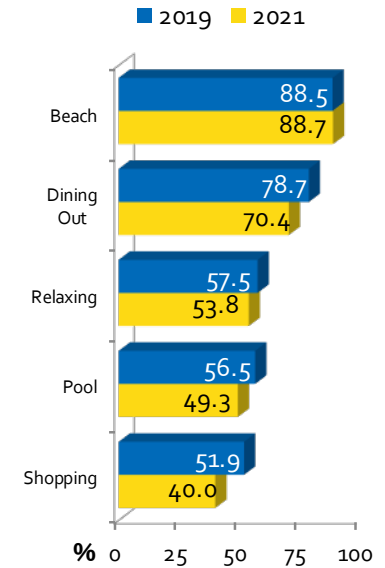
Plan to Return (% Yes)

	May 2019	May 2021	
To Local Area	89.2%	91.3%	↑

Naples, Marco Island, Everglades Visitor Profile May 2021

Activities Enjoyed in Area (Multiple Response)	May 2019	May 2021	
Beach	88.5%	88.7%	↑
Dining Out	78.7	70.4	↓
Relaxing	57.5	53.8	↓
Pool	56.5	49.3	↓
Shopping	51.9	40.0	↓
Enjoying Nature/Bird Watching/Everglades	36.2	38.2	↑
Sunsets	35.6	37.4	↑
Swimming	30.9	35.7	↑
Sightseeing	23.6	26.8	↑
Sunning	29.0	25.3	↓
Walking	26.8	22.5	↓
Reading	30.1	22.1	↓
Boating	n/a	19.4	—
Bars/Nightlife	21.3	14.8	↓
Visiting with Friends/Relatives	14.4	10.0	↓
Fishing	n/a	8.5	—
Art Galleries/Shows/Fairs	13.5	7.9	↓
Golfing	7.2	4.2	↓

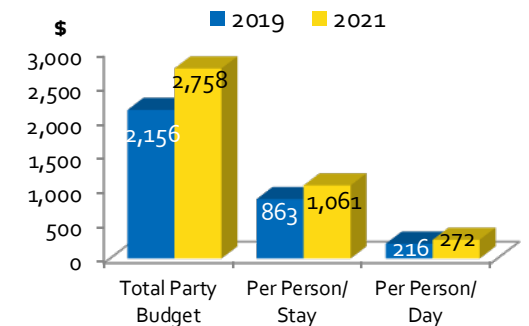
Activities Enjoyed in Area (Top Five)



Demographics	May 2019	May 2021	
Average Age Head of Household (Years)	47.0	46.6	↓
Median Annual Household Income	\$145,279	\$142,096	↓

Collier Base Budget	May 2019	May 2021	
Total	\$2,156.45	\$2,758.37	↑
Per Person/Stay	862.58	1,060.91	↑
Per Person/Day	215.65	272.03	↑

Collier Base Budgets



Naples, Marco Island, Everglades Visitor Profile | May 2021

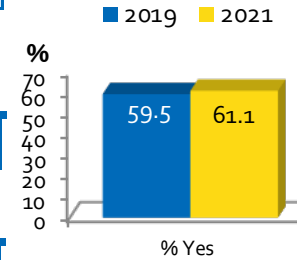
Area Information Seen/Read/Heard	May 2019	May 2021	
% Yes	59.5%	61.1%	↑

Directly Influenced by Information (Base: Seen/Read/Heard Area Information)	May 2019	May 2021	
% Yes	48.5%	51.5%	↑

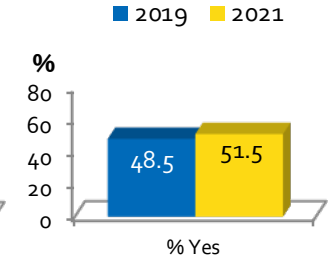
Why Chose the Area (Multiple Response)	May 2019	May 2021	
Beach Area	54.7%	51.8%	↓
Weather	48.4	44.6	↓
Previous Experience	35.0	36.2	↑
Quality of Accommodations	30.3	32.6	↑
Outdoor Recreation/Nature	28.2	32.4	↑
Quiet/Peaceful/Laid Back	32.2	30.0	↓
Appealing Brochures/Websites	23.6	29.0	↑
Relaxing	32.8	28.8	↓
Not Crowded	28.6	27.5	↓
Restaurants	31.0	22.7	↓
Recommendation	24.9	22.6	↓
Never Been	20.4	17.1	↓
Business/Meeting/Conference	25.8	10.0	↓

Internet Use	May 2019	May 2021	
Use Internet to Obtain Travel Info for This Trip (% Yes)	95.0%	98.1%	↑
Book Reservations for Trip Online (%Yes)	79.2	83.5	↑

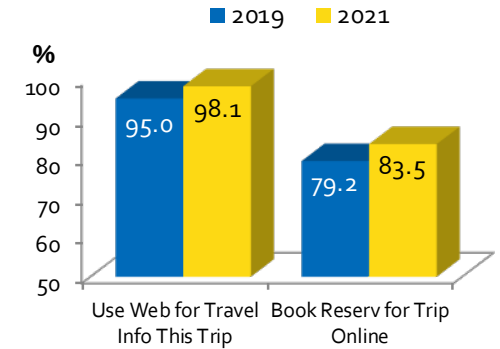
Seen/Read/Heard



Info. Influenced



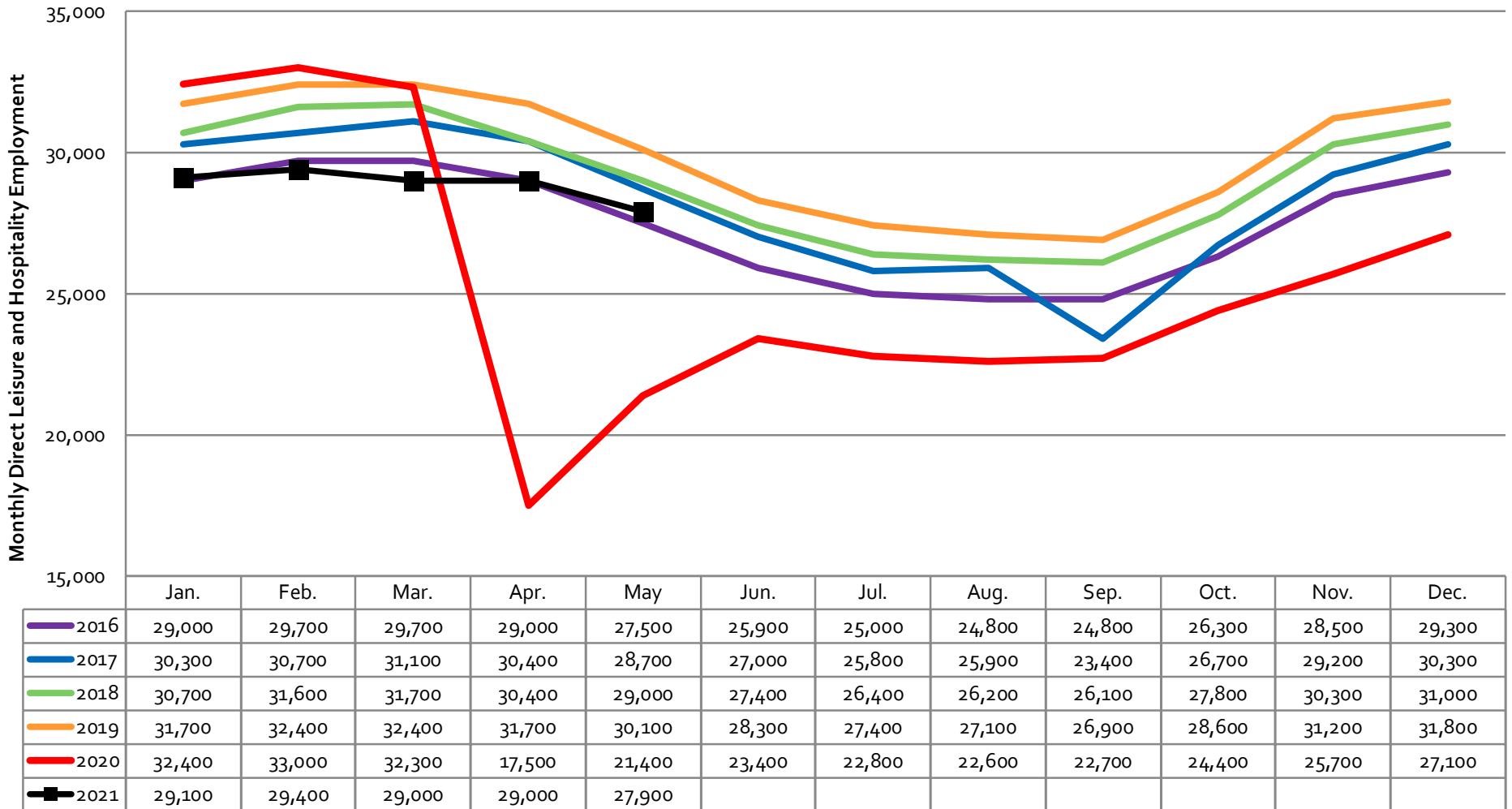
Internet Use



Industry Data: *2016 - 2021*

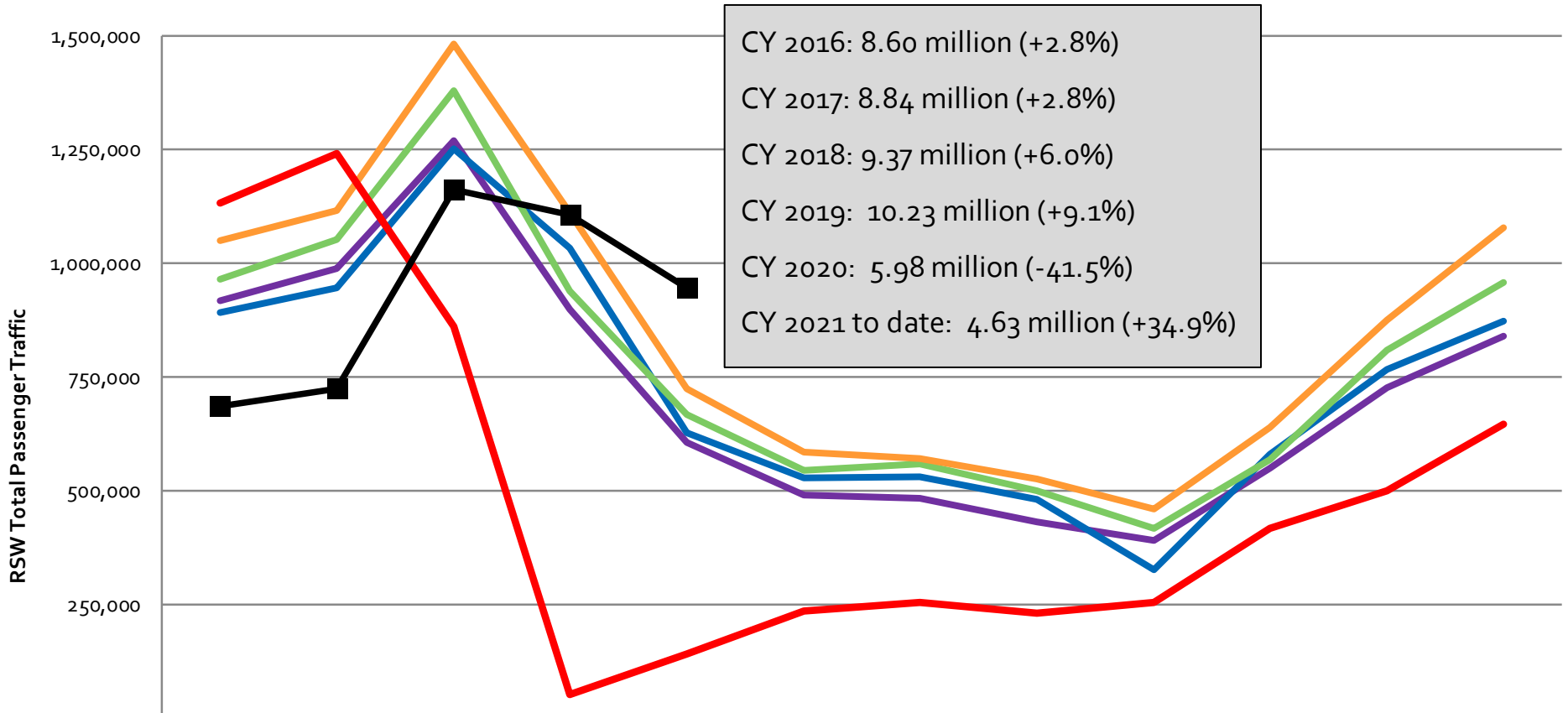


Collier Direct Leisure and Hospitality Employment (Calendar Year) *



* SOURCE: Florida Department of Economic Opportunity, Labor Market Information, Current Employment Statistic Program (CES), Collier County Leisure and Hospitality Sector. (June 2019 through December 2020 employment projections revised as of March 15, 2021 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	861,221	53,379	143,004	237,706	256,418	231,283	255,926	417,305	500,468	648,011
2021	686,563	725,735	1,162,342	1,107,004	946,366							