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Naples, Marco Island, Everglades Convention and Visitors Bureau November 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.

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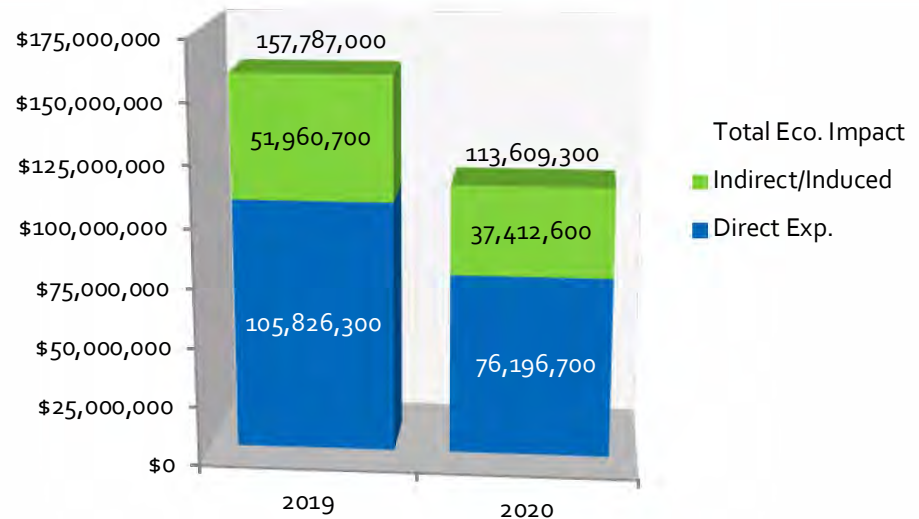
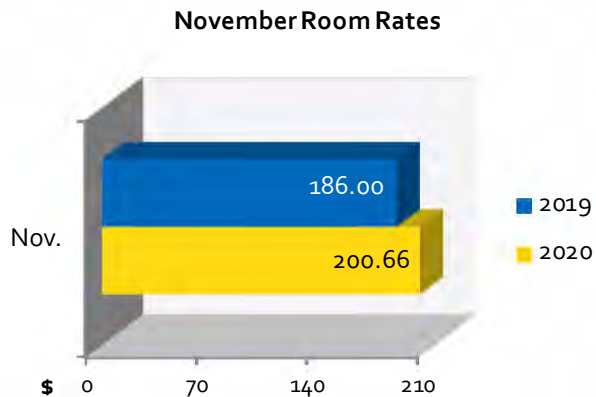
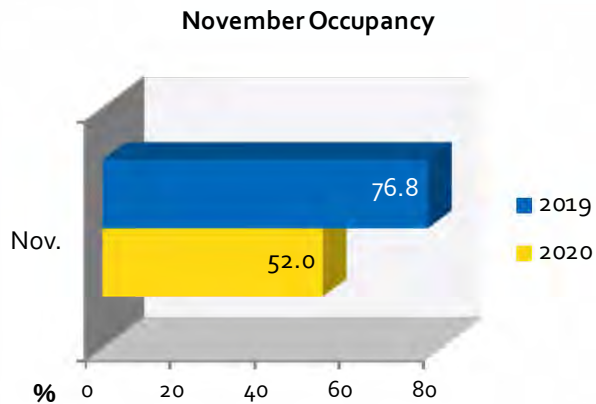
December 2020

Naples, Marco Island, Everglades Visitor Profile | November 2020

H/M/C+ Visitor Statistics	Year to Date (January – November)			November		
	2019	2020	% Δ '19/'20	2019	2020	% Δ '19/'20
Visitors (#)	1,747,600	1,272,900	-27.2	154,500	115,200	-25.4
Room Nights	2,311,900	1,646,300	-28.8	191,700	143,800	-25.0
Direct Exp. (\$)	\$1,388,802,000	\$949,362,100	-31.6	\$105,826,300	\$76,196,700	-28.0
Total Eco. Impact (\$)	\$2,070,703,700	\$1,415,499,000	-31.6	\$157,787,000	\$113,609,300	-28.0

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

November Economic Impact



November

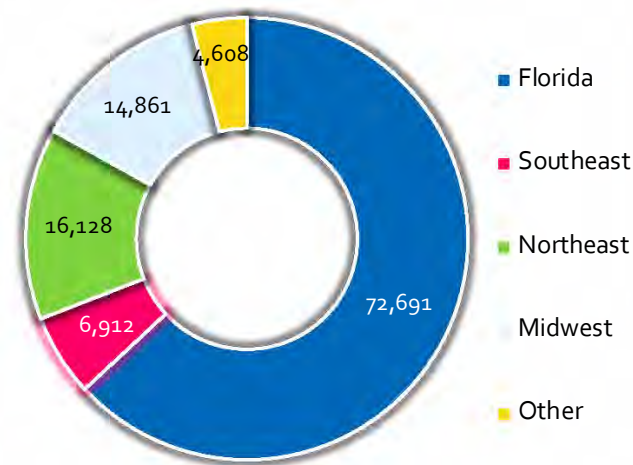
Lodging Statistics	2019	2020	% Δ '19/'20
Occupancy	76.8%	52.0%	-32.3
Room Rates	\$186.00	\$200.66	+7.9
RevPAR	\$142.80	\$104.34	-26.9

November 2020 Visitor Origin Markets

Visitor Origins	2019		2020		% Δ '19/'20
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	
Florida	37.2%	57,474	63.1%	72,691	+26.5
Southeast	6.9	10,660	6.0	6,912	-35.2
Northeast	13.7	21,167	14.0	16,128	-23.8
Midwest	15.9	24,566	12.9	14,861	-39.5
Canada*	2.8	4,326	0.0	0	-100.0
Europe*	18.4	28,428	0.0	0	-100.0
Other	5.1	7,879	4.0	4,608	-41.5
Total	100.0	154,500	100.0	115,200	-25.4

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

November 2020 Visitor Origins



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Transportation Mode (Multiple Response)	November 2019	November 2020	
Personal Car	36.7%	73.3%	↑
Plane	62.4	26.7	↓
Rental Car	56.3	24.6	↓

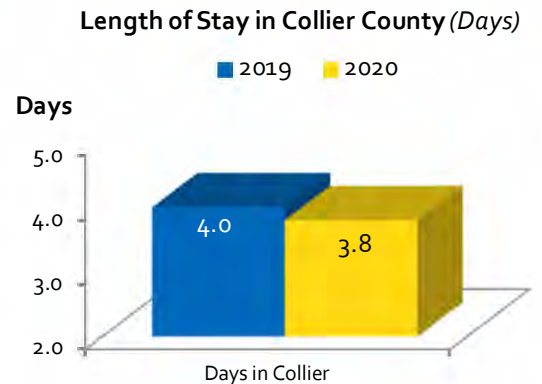
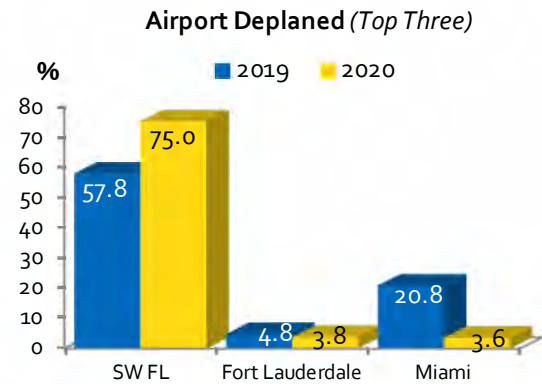
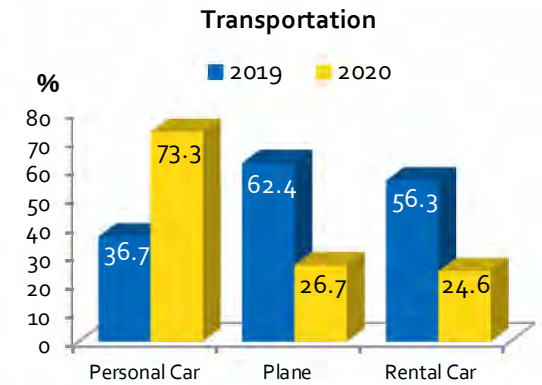
Airport Deplened (Base: Flew)	November 2019	November 2020	
Southwest Florida International	57.8%	75.0%	↑
Ft. Lauderdale International	4.8	3.8	↓
Miami International	20.8	3.6	↓
Orlando International/Sanford	7.9	1.8	↓
Tampa International	7.4	1.0	↓

Purpose of Trip (Multiple Response)	November 2019	November 2020	
Vacation/Weekend Getaway	68.3%	80.1%	↑
Group Travel	31.0	12.0	↓
Visit with Friends and Relatives	14.1	8.6	↓
Special Event	9.8	1.5	↓

First Visit to (% yes)	November 2019	November 2020	
Collier County	39.3%	28.8%	↓
Florida	3.6	2.9	↓

Length of Stay (Days)	November 2019	November 2020	
In Collier County	4.0	3.8	↓

Party Size	November 2019	November 2020	
Number of People	2.4	2.3	↓



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Party Composition <i>(Multiple Response)</i>	November 2019	November 2020	
Couple	62.2%	60.7%	↓
Family	28.2	31.6	↑
Single	8.9	6.7	↓
Group of Friends	2.8	4.5	↑
Group of Couples	3.5	N/A	↓

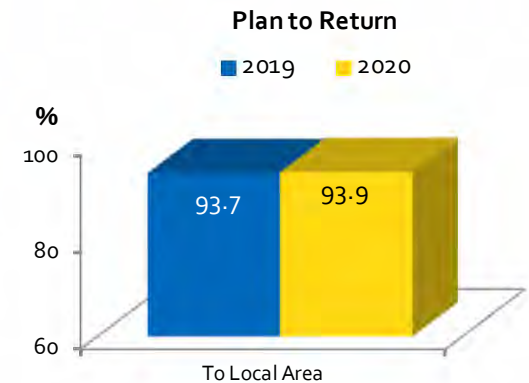
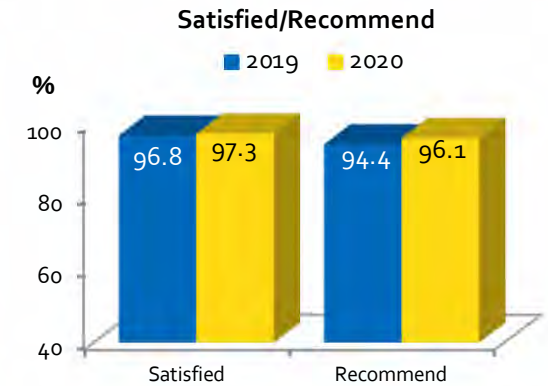
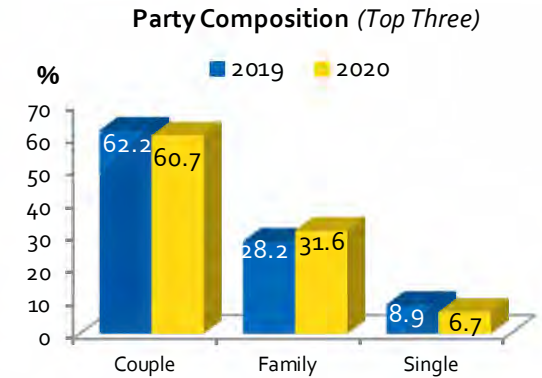
Did Party Have Lodging Reservations for Stay	November 2019	November 2020	
% Yes	96.6%	96.3%	↓

Expense Relative to Expectations	November 2019	November 2020	
More Expensive	22.7%	15.2%	↓
Less Expensive	5.3	1.5	↓
As Expected	65.5	75.8	↑

Satisfaction with Collier County	November 2019	November 2020	
Very Satisfied	93.3%	85.9%	↓
Satisfied	3.5	11.4	↑
Satisfaction Level (Combined)	96.8%	97.3%	↑

Recommend Collier to Friends/Relatives	November 2019	November 2020	
% Yes	94.4%	96.1%	↑

Plan to Return (% Yes)	November 2019	November 2020	
To Local Area	93.7%	93.9%	↑

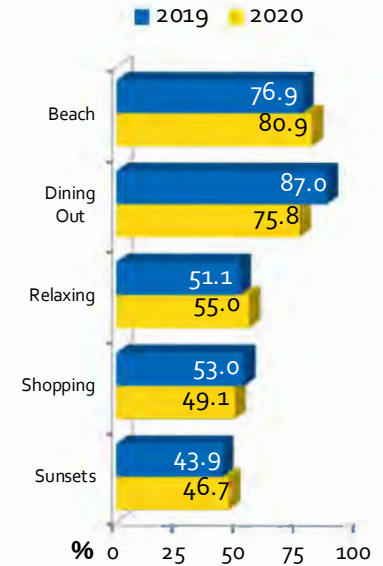


Naples, Marco Island, Everglades Visitor Profile | November 2020

Activities Enjoyed in Area (Multiple Response)

	November 2019	November 2020	
Beach	76.9%	80.9%	↑
Dining Out	87.0	75.8	↓
Relaxing	51.1	55.0	↑
Shopping	53.0	49.1	↓
Sunsets	43.9	46.7	↑
Enjoying Nature/Bird Watching/Everglades	30.0	39.7	↑
Sunning	33.3	30.9	↓
Pool	25.1	28.9	↑
Walking	17.8	26.7	↑
Swimming	18.7	20.0	↑
Reading	16.0	18.9	↑
Sightseeing	23.0	18.5	↓
Shelling	15.0	16.7	↑
Visiting with Friends/Relatives	16.5	15.2	↓
Bars/Nightlife	16.5	12.3	↓
Boating	13.1	10.6	↓
Golfing	9.6	10.2	↑
Fishing	--	8.7	—
Art Galleries/Shows/Fairs	16.3	5.6	↓

Activities Enjoyed in Area (Top Five)



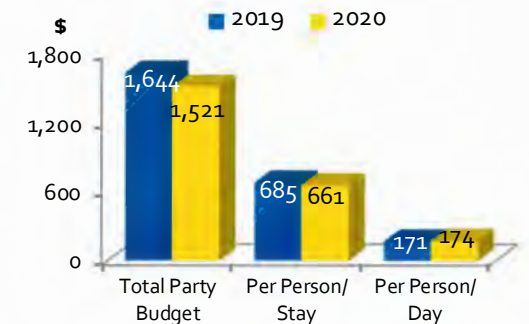
Demographics

	November 2019	November 2020	
Average Age Head of Household (Years)	47.8	46.7	↓
Median Annual Household Income	\$174,026	\$156,962	↓

Collier Base Budget

	November 2019	November 2020	
Total	\$1,643.90	\$1,521.28	↓
Per Person/Stay	684.96	661.43	↓
Per Person/Day	171.24	174.06	↑

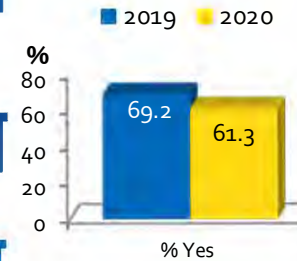
Collier Base Budgets



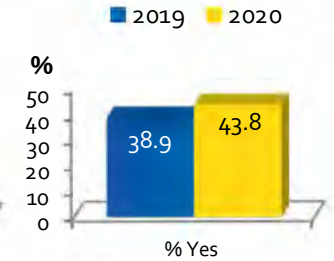
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Area Information Seen/Read/Heard	November 2019	November 2020	
% Yes	69.2%	61.3%	↓
Directly Influenced by Information (Base: Seen/Read/Heard Area Information)			
	November 2019	November 2020	
% Yes	38.9%	43.8%	↑
Why Chose the Area (Multiple Response)			
	November 2019	November 2020	
Beach Area	59.2%	59.9%	↑
Quiet/Peaceful/Laid Back	56.9	48.9	↓
Quality of Accommodations	39.2	45.6	↑
Previous Experience	40.4	43.9	↑
Relaxing	44.3	38.6	↓
Appealing Brochures/Websites	37.1	33.0	↓
Weather	47.7	32.4	↓
Not Crowded	34.1	30.7	↓
Outdoor Recreation/Nature	29.4	28.4	↓
Restaurants	31.7	27.7	↓
Recommendation	19.3	20.0	↑
Business/Meeting/Conference	32.7	7.9	↓
Never Been	15.8	7.4	↓
Internet Use			
	November 2019	November 2020	
Use Internet to Obtain Travel Info for This Trip (% Yes)	93.8%	93.9%	↑
Book Reservations for Trip Online (%Yes)	87.2	85.2	↓

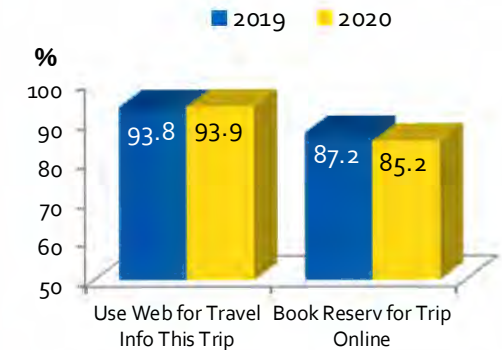
Seen/Read/Heard



Info. Influenced



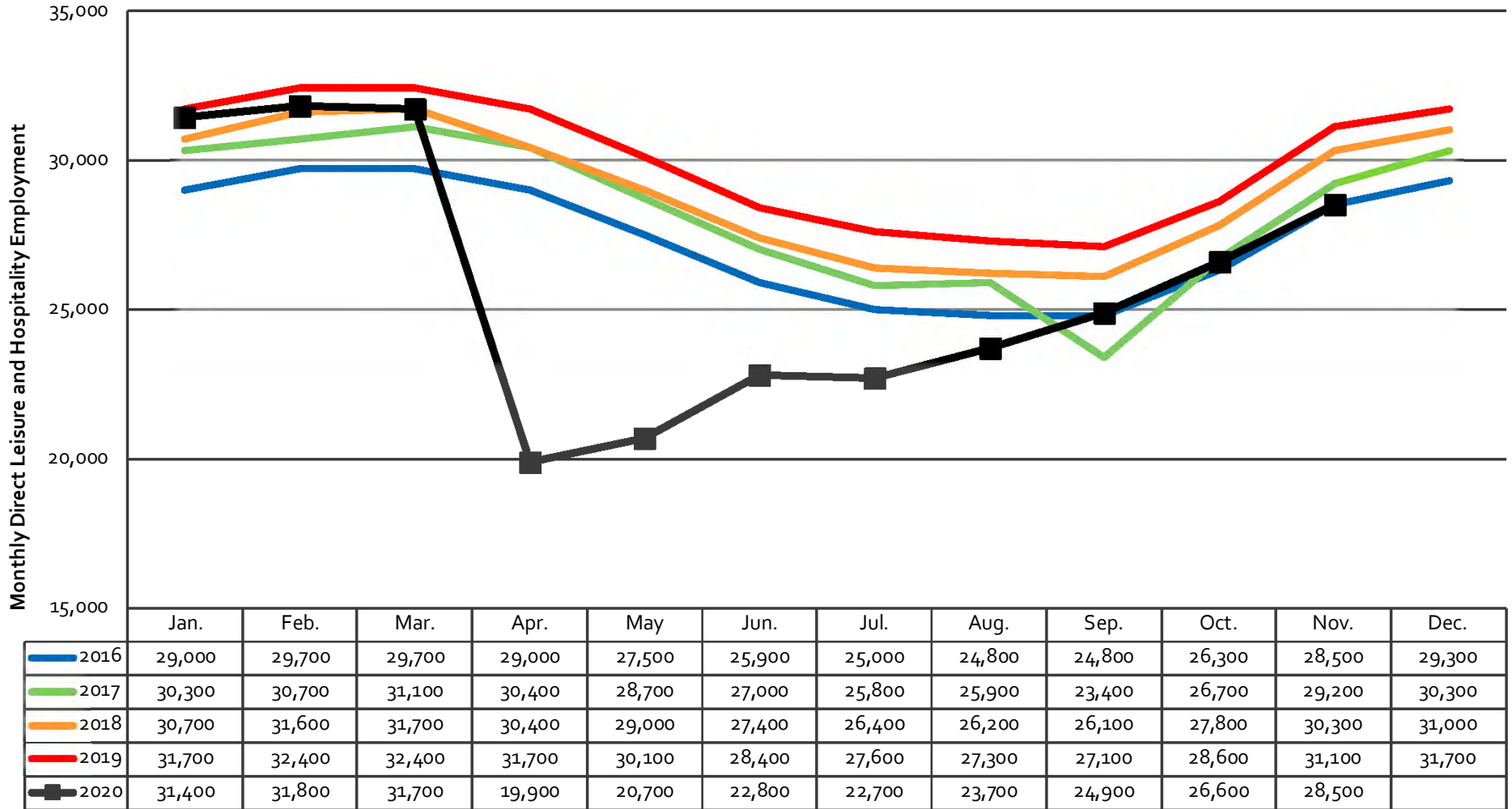
Internet Use



Industry Data: 2016 - 2020

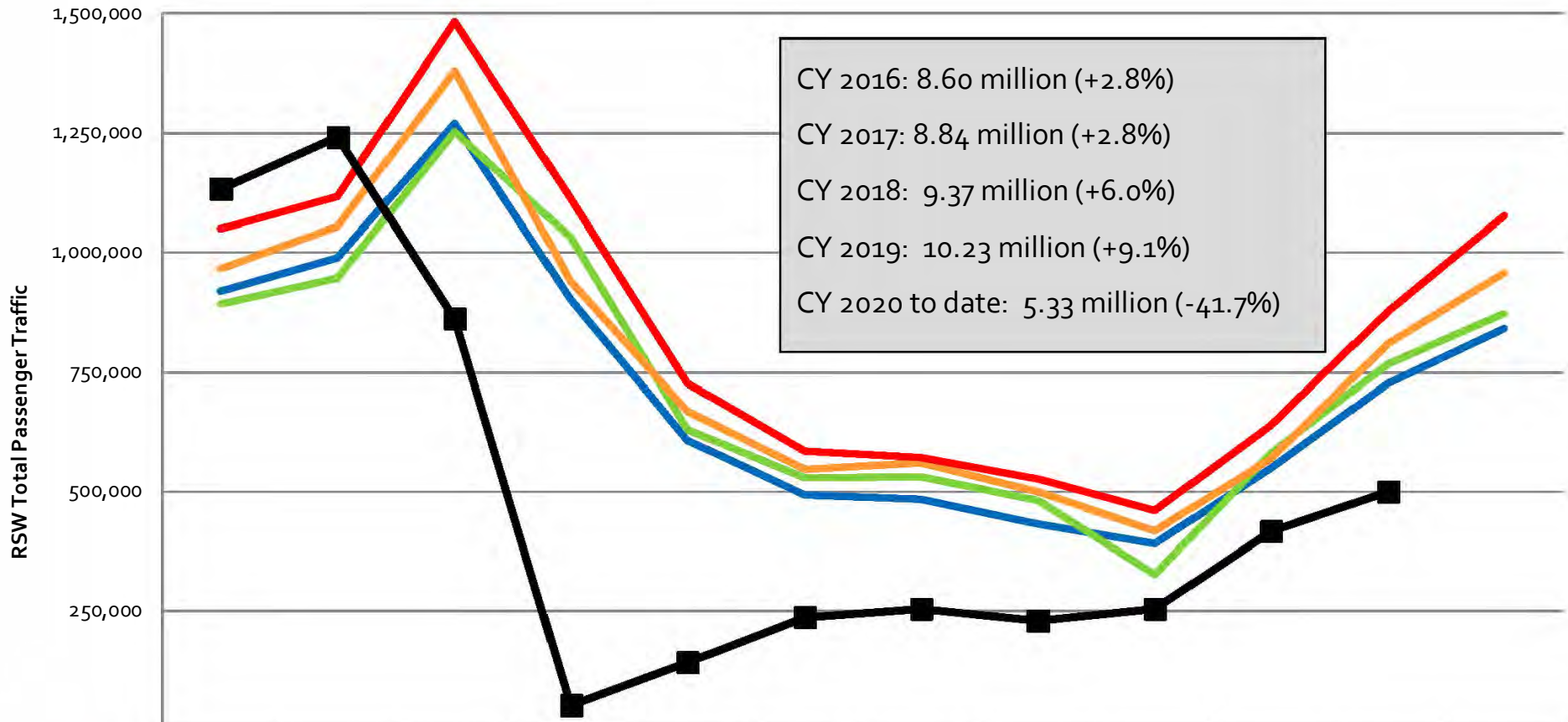


Collier Direct Leisure and Hospitality Employment (Calendar Year) *



* 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	861,221	53,379	143,004	237,706	256,418	231,283	255,926	417,305	500,468	