



2022
In County Regional Hotel Survey

Final Report
April 2022





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In County Regional Hotel Survey

Final Report
Prepared for Visit Jacksonville
by the Public Opinion Research Lab at the
University of North Florida



UNF

Public Opinion
Research Lab

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Introduction

The city of Jacksonville is situated on 747 square miles in the Northeast corner of Florida and is home to 949,611 residents. The St. John's River winds through the Jacksonville metropolitan area, connecting multiple parts of town to the Atlantic coast, and 22 miles of beaches. In addition to natural attractions, the city hosts numerous sporting events annually, as the home of the Jacksonville Jaguars NFL team, as well as The Players Championship golf tournament, the annual Florida-Georgia football game, and the Gator Bowl. Arts and cultural events, such as the Jacksonville Jazz Festival, also draw visitors to the area from across the country.

In 2019, Jacksonville and the beaches played host to 7,209,715 visitors in paid hotel accommodations, according to Visit Jacksonville's Visitor Estimates report. As disruptions caused by the COVID-19 pandemic begin to subside, the usage, makeup, and needs of the hospitality industry must be reassessed and addressed. In order to accomplish this, Visit Jacksonville contracted the Public Opinion Research Lab (PORK) at the University of North Florida to conduct a survey of local hotel managers and owners to gauge their status and needs. This study aims to measure changes to the hotel industry over the past year, as well as new challenges, successes, and areas in need of support.

Executive Summary



53% of establishments said they book blocks of rooms *at least most weeks*.



Leisure guests account for the greatest percentage of typical guest makeup, with an average of **35%***



44% said they would like to book more **business non-groups** at their establishments

Weekends and **Extended Weekends** are the busiest times for **72%** of establishments surveyed



84% said they are **on or ahead of pace** to accomplish Q3 and Q4 2022, and Q1 and Q2 2023

Marketing and social media assistance is the most helpful resource, at **40%**



* The 35% figure represents the average (mean) response when asked about the percentage of typical guest makeup. It does not indicate that 35% of all guests are leisure guests.

Methodology

Total number of completed surveys: **88**

Population: **Hotel managers and owners across Duval County**

In the field: **March 23 – April 13, 2022**

This study used a mixed-mode approach to implement a survey of local hotel managers and owners. First, respondents were contacted online via the online survey tool Qualtrics. Those who did not complete the online survey were then contacted via telephone by a PORL interviewer, using 27-station Computer Assisted Telephone Interviewing (CATI) system. The online survey was administered beginning March 23, and the phone survey beginning March 30, both ending on April 13, 2022.

The sampling frame consisted of 156 hotels in the Jacksonville area, and was provided by Visit Jacksonville. The study had a total of 88 unique completed surveys. Of those surveys, 22 were completed online, with the remaining 66 surveys completed by phone.

Several open-ended questions were re-coded into different categories for analysis. In many cases, a wide variety of responses caused a high frequency in the “other” category. A full list of responses to open-ended questions is provided in Appendix A of this report.

Summary of Findings
Figure 1. Respondent Profile

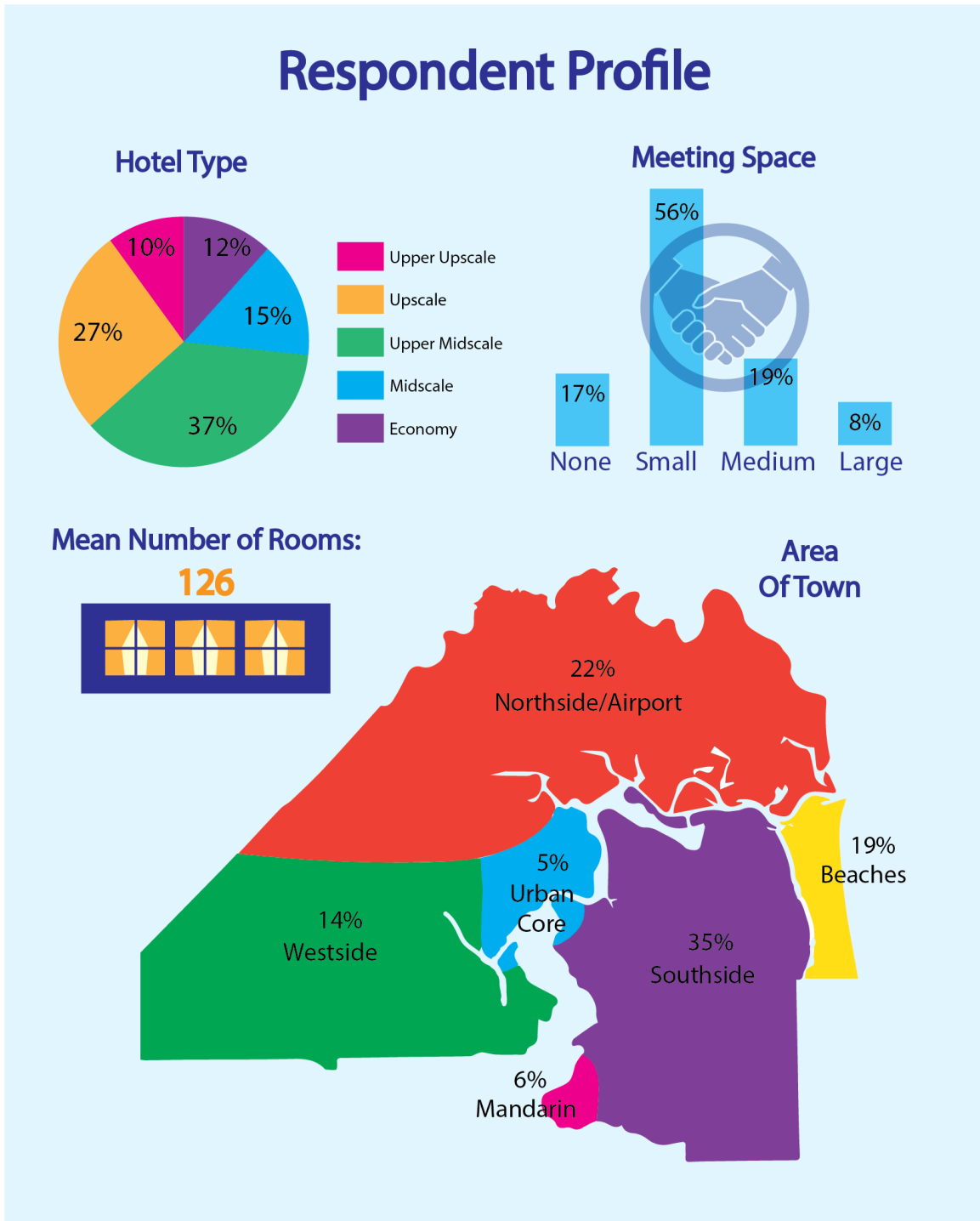
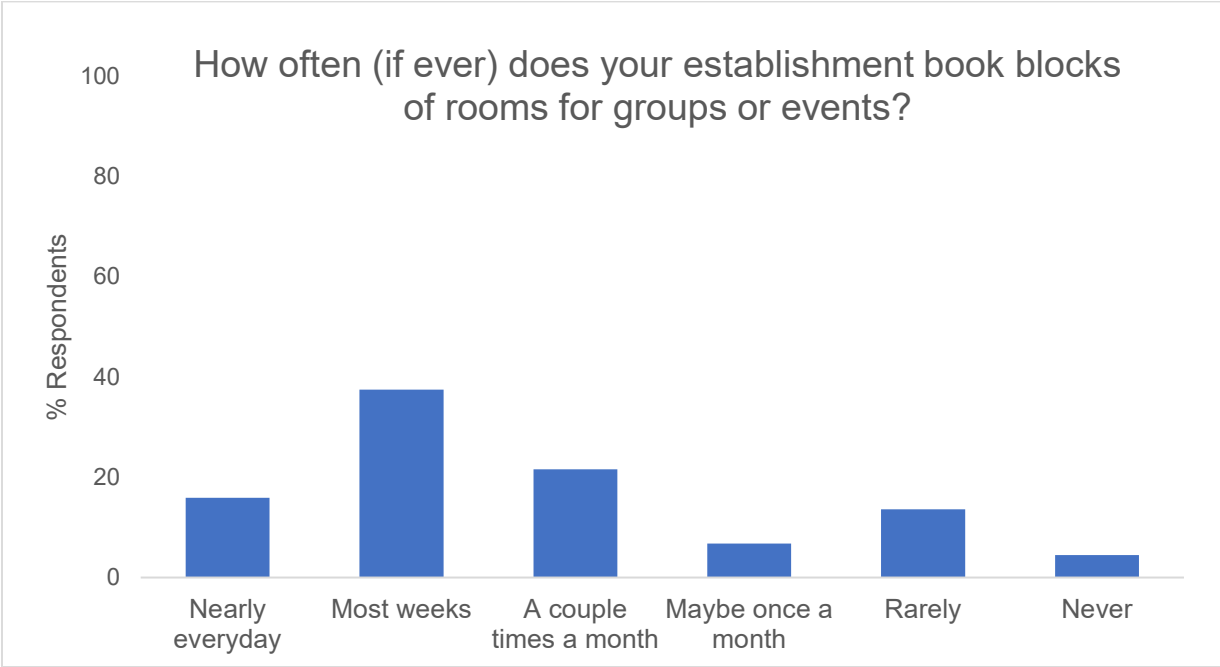


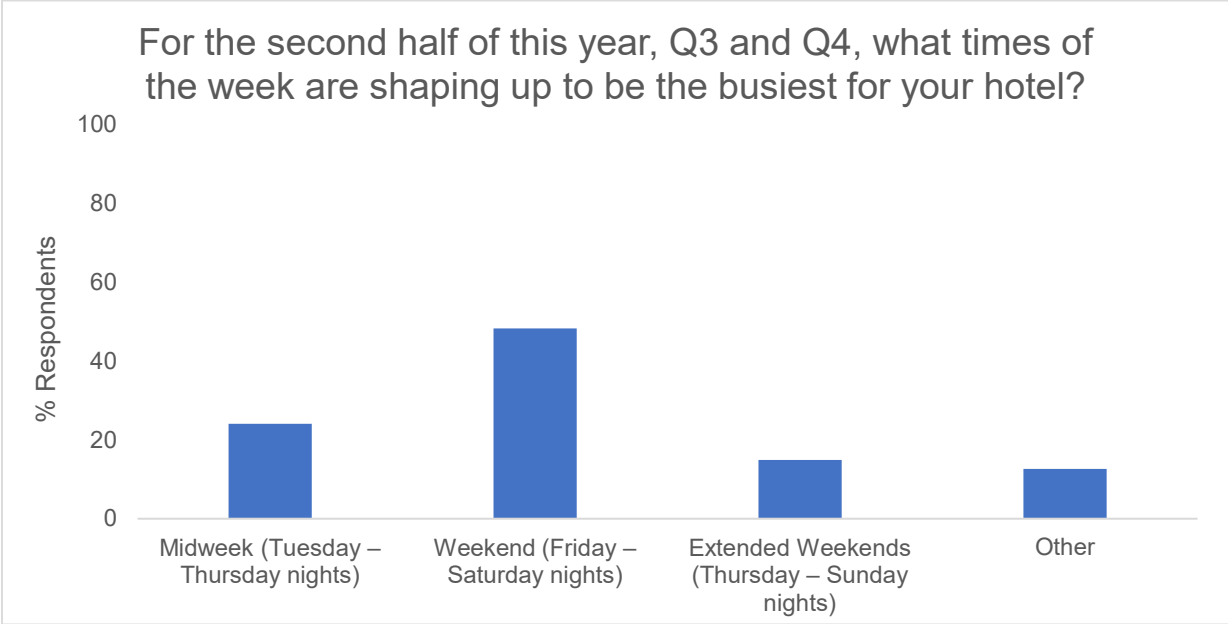
Figure 1 above displays the characteristics of the hotels that were surveyed in this study. Upper midscale hotels make up 35% of the total sample, 56% have small meeting spaces, 35% are located on the Southside, and the average (mean) number of rooms is 126.

Figure 2. Room Blocks for Groups



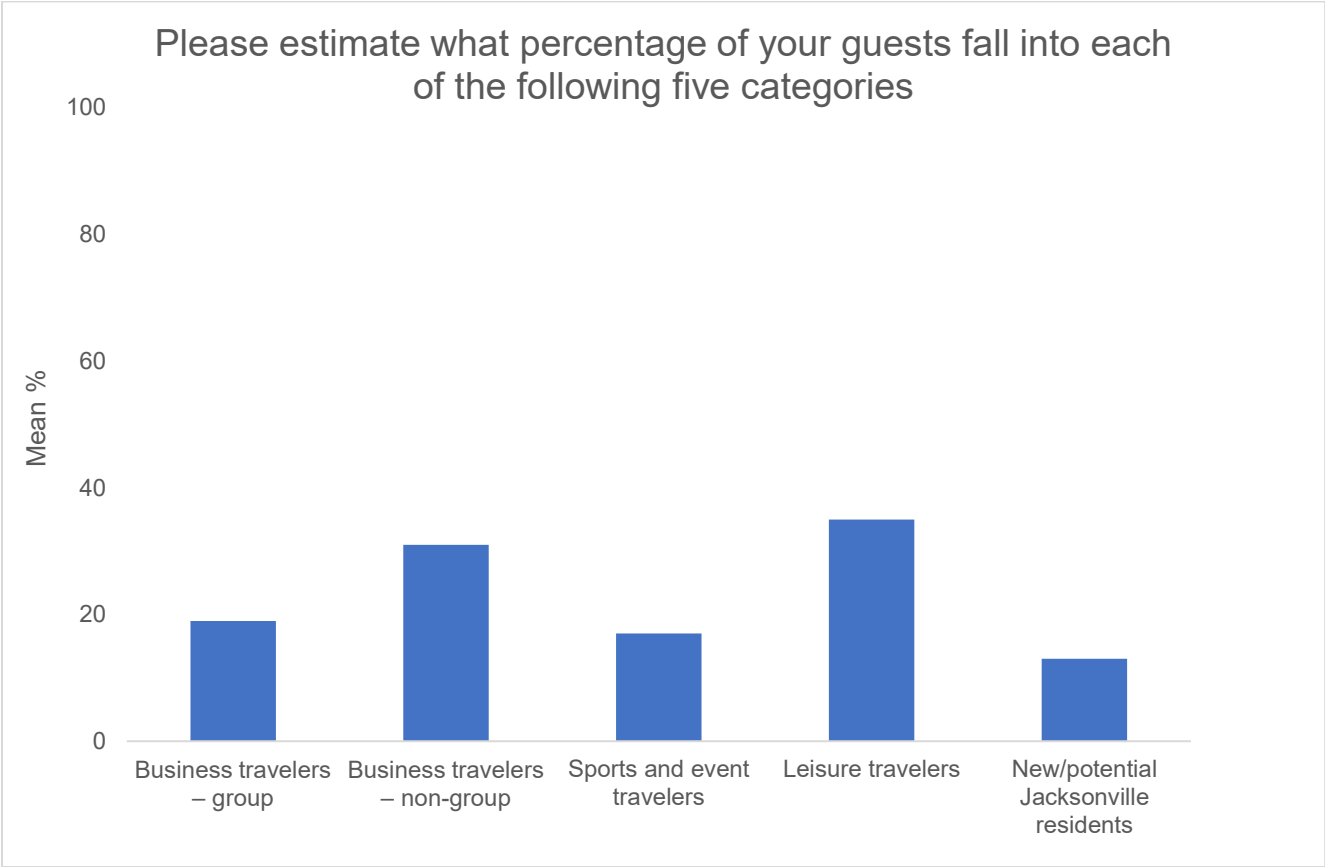
When asked how often they booked blocks of rooms for groups or events, 38% of respondents said they book blocks most weeks. Sixteen percent report booking blocks of rooms nearly every day, more than half of responding hotels book groups at least most weeks while less than 20% rarely or never book blocks of rooms.

Figure 3. Busy Period



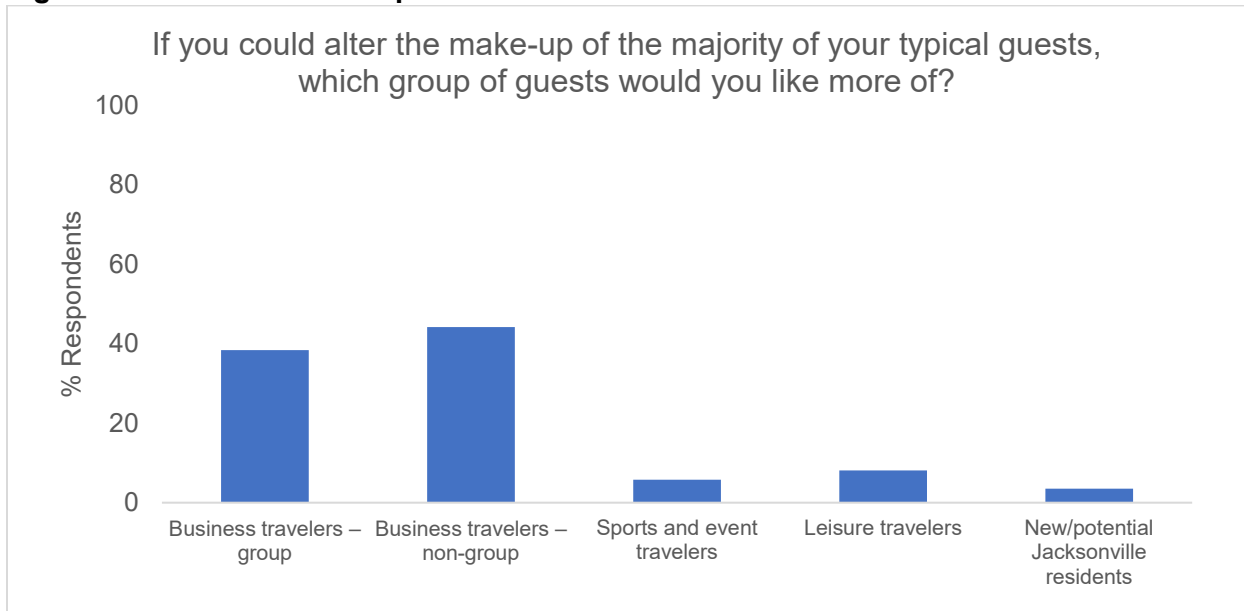
Only 24% of hotels said that midweek is their busiest time, while nearly half (48%) said the weekends and 15% indicated extended weekends are busiest.

Figure 4. Current Guest Makeup



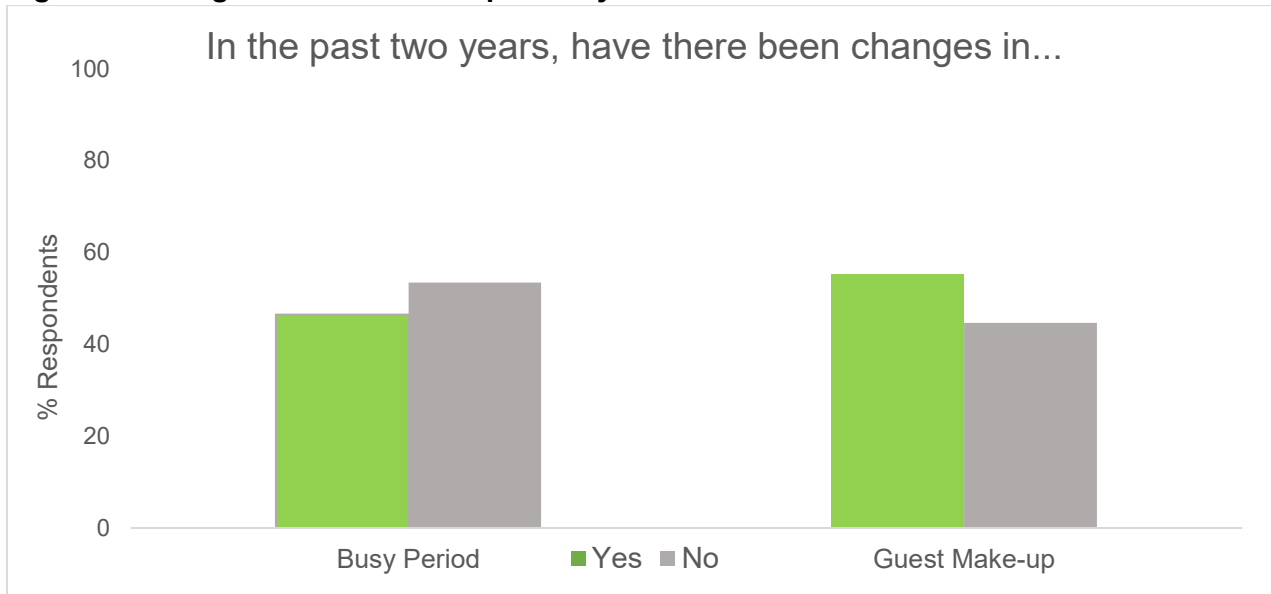
Respondents were asked to estimate the percentage of their typical guests that fall into five different categories. Figure 4 above shows the mean (average) values for each category. On average, business travelers account for half of the hotel guest makeup. Non-group business guests have a mean percentage of 31%, while 19% is the mean for business guests in a group. Seventeen percent were sports or event travelers, and only 13% were new or potential Jacksonville residents.

Figure 5. Ideal Guest Makeup



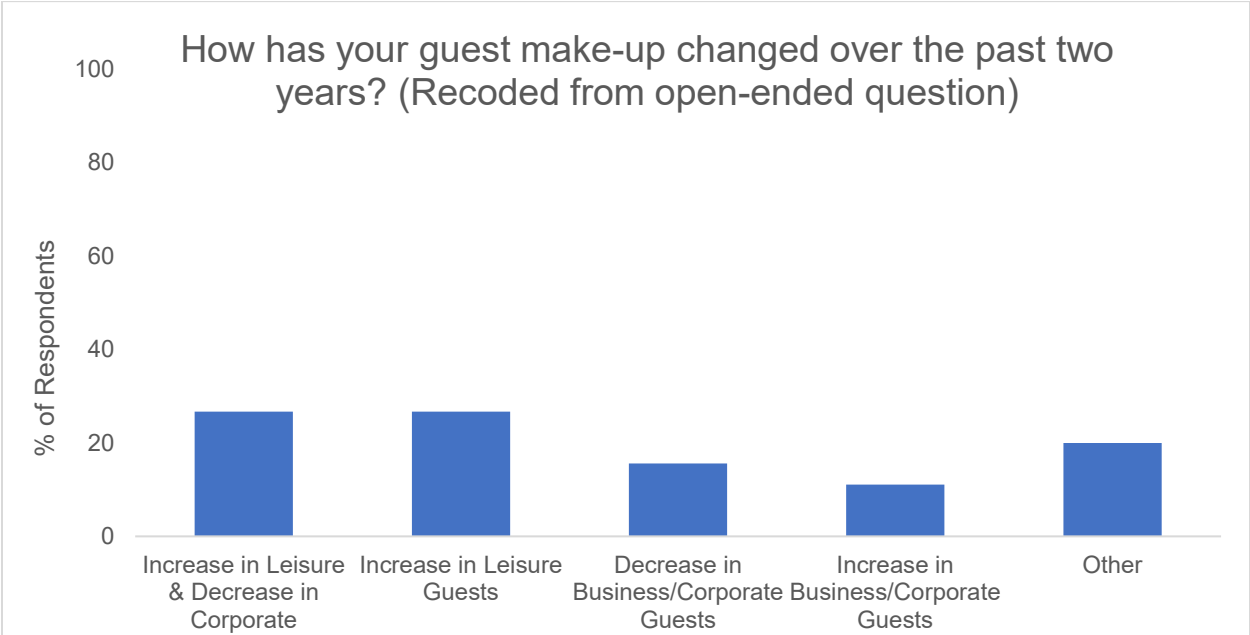
Respondents were asked what type of guests they would like to see more of. The vast majority of respondents chose more business travelers, at a total of 82%. Forty-four percent chose business travelers not in a group and 38% chose business travelers in a group.

Figure 6. Changes in Guest Makeup & Busy Period



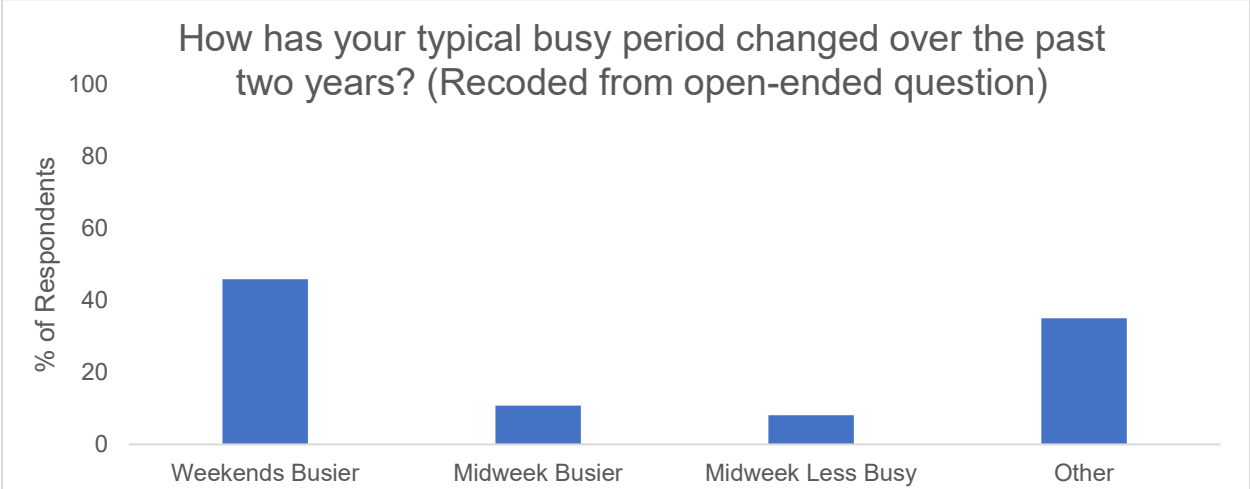
Respondents reported a change in their guest makeup over the past two years, with 55% saying the majority of their typical guests had changed. Similarly, 47% of respondents reported a change in their typical busy period over the past two years.

Figure 7. Specific Changes in Guest Makeup



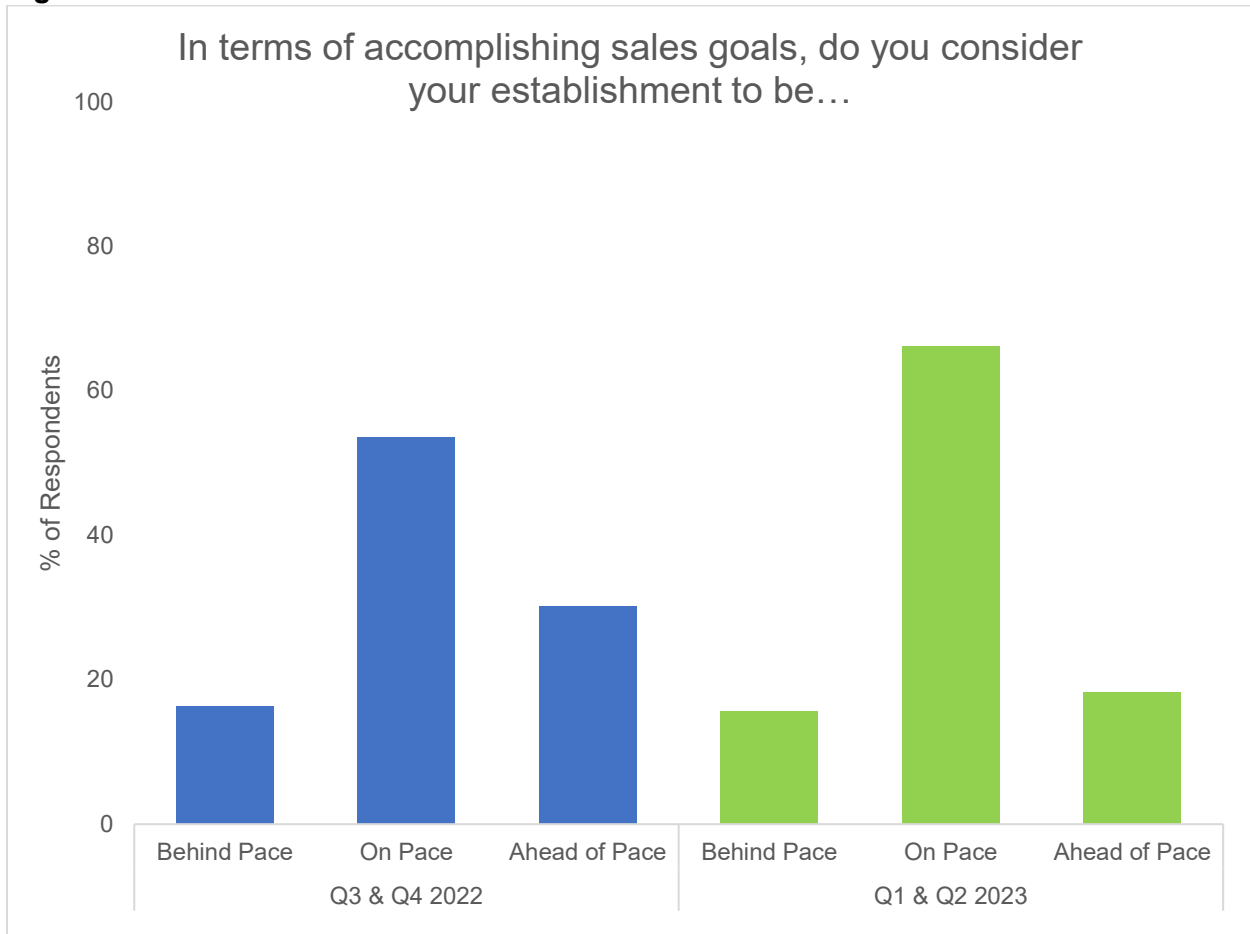
Those who indicated that there had been a change in guest makeup in the past two years were then asked how it had changed in an open-ended question. Figure 7 above shows the recoded responses. Due to widely varied answers, the “other” category has a relatively high frequency. The most common response was an increase in leisure guests, either by itself (27%), or coupled with a decrease in corporate and business travelers (27%). Eleven percent of respondents indicated an increase in business and corporate guests.

Figure 8. Specific Changes in Busy Period



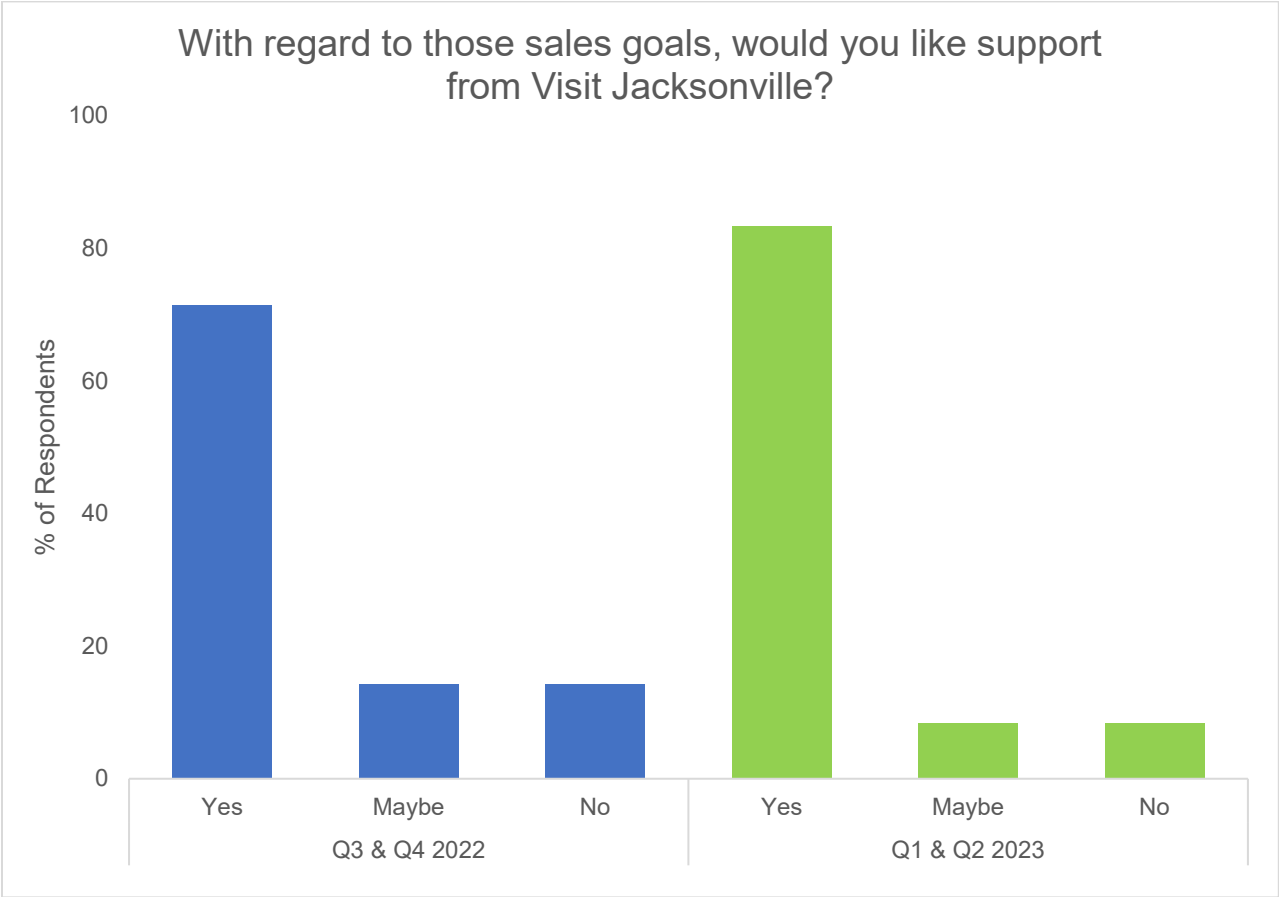
Respondents who indicated there has been a change in typical busy period in the past two years were asked how their busy period had changed. Figure 8 displays the recoded responses from this open-ended question. Again, due to varied responses, the “other” category has a relatively high frequency. Forty-six percent of respondents said that weekends have become busier in the past two years.

Figure 9. Sales Goals: 2022 & 2023



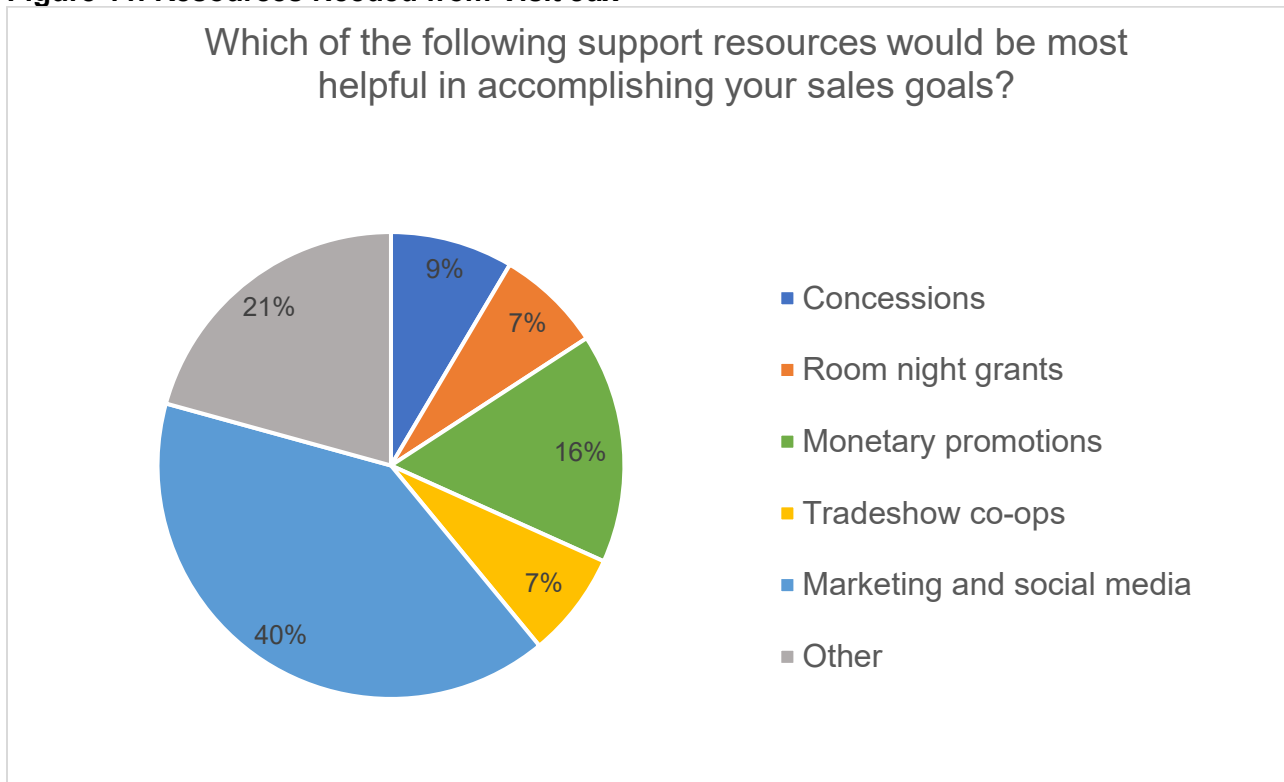
When asked about their sales goals in the third and fourth quarters of 2022, 54% of respondents reported being on pace, 30% said they are ahead of pace, and 16% said they were behind pace. For the first two quarters of 2023, 66% of respondents said they were on pace for accomplishing their sales goals. Eighteen percent said they were ahead of pace for that period, with 16% saying they were behind pace.

Figure 10. Support in Accomplishing Goals



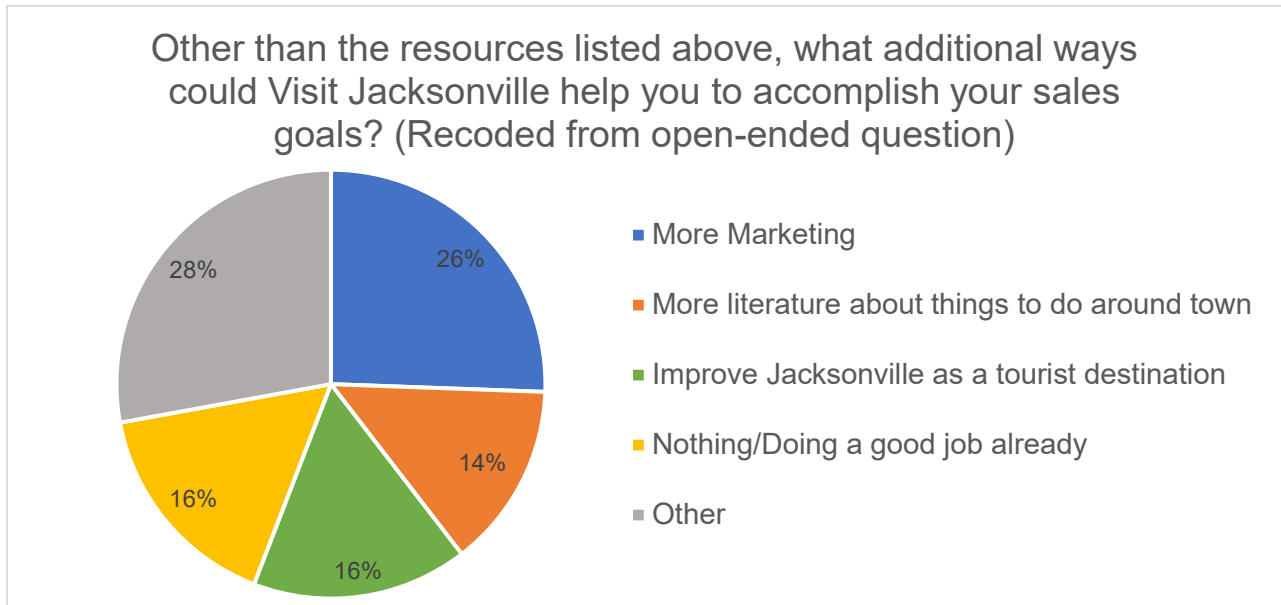
Respondents who indicated they were behind pace in either 2022 or 2023 sales goals were then asked whether they wished to receive support from Visit Jacksonville. Of the behind-pace 2022 respondents, 71% said they would like support, 14% said they would not, and 14% weren't sure. Of the respondents who said they were behind pace for the beginning of 2023, 83% said they would like support, 8% percent said no, and an additional 8% were unsure.

Figure 11. Resources Needed from Visit Jax



Respondents were given a pre-defined list of resources offered by Visit Jacksonville, and asked to indicate which would be the most helpful in accomplishing their sales goals. Marketing and social media assistance for large groups was the most frequent response at 40%, with monetary promotions in a distant second place at 16%. Twenty-one percent indicated that something else would be most helpful, and they were given the opportunity to elaborate in a subsequent question.

Figure 12. Additional Resources Requested



In addition to the pre-defined question regarding resources, respondents were also asked what additional resources Visit Jacksonville could provide that could help accomplish their sales goals. This was asked of all respondents, not just of those who indicated “other” in the previous question. Figure 12 above show the recoded responses from this open-ended question.

Once again, responses varied, “other” was the most popular category, with 28%. Of the codable responses, 26% said more marketing would be most helpful. Improving Jacksonville as a tourist destination received 16%, and another 16% said they do not require any additional resources, or that Visit Jacksonville is already doing a good job. Fourteen percent indicated they would like more literature and brochures about what to do around Jacksonville.

Survey Results

What area of town is your establishment in?

	Total n= 88
Urban Core – Downtown/San Marco/Southbank/Riverside	5% 4
Beaches	19% 17
Southside	35% 31
Northside/Airport	22% 19
Mandarin	6% 5
Westside	14% 12

How often (if ever) does your establishment book blocks of rooms for groups or events?

	Total n= 88
Nearly everyday	16% 14
Most weeks	38% 33
A couple times a month	22% 19
Maybe once a week	7% 6
Rarely	14% 12
Never	5% 4

Please estimate what percentage of your guests fall into each of the following five categories: Business Travelers in a group, Business Travelers not in a group, Sports and Event Travelers, Leisure Travelers, and New or Potential Jacksonville Residents?

Total n=86	Mean	Median
Business travelers in a group	19%	10%
Business travelers <i>not</i> in a group	31%	25%
Sports and event travelers	17%	10%
Leisure Travelers	35%	30%
New or potential Jacksonville residents	13%	5%

Note. Respondents were asked for rough estimates, and most responses did not add up to 100%.

Guest Makeup * Hotel Type

Total n=86	Economy	Midscale	Upper Midscale	Upscale	Upper Upscale
Business travelers in a group	18%	22%	19%	14%	28%
Business travelers <i>not</i> in a group	36%	31%	36%	28%	19%
Sports/event travelers	8%	23%	17%	15%	23%
Leisure Travelers	28%	44%	34%	37%	36%
New/potential Jacksonville residents	26%	19%	6%	14%	3%

Guest Makeup * Area of Town

Total n=86	Urban Core	Beaches	Southside	Northside	Mandarin	Westside
Business travelers in a group	29%	15%	17%	17%	25%	20%
Business travelers <i>not</i> in a group	36%	22%	28%	38%	31%	40%
Sports/event travelers	11%	15%	23%	14%	17%	14%
Leisure Travelers	20%	54%	29%	34%	49%	28%
New/potential Jacksonville residents	4%	7%	17%	13%	15%	10%

Has the majority of your typical guests changed over the past two years?

	Total n= 85
Yes	55% 47
No	45% 38

How has your guest make-up changed over the past two years? (Recoded from open-ended question)

	Total n= 45
Increase in Leisure Guests	27% 12
Increase in Leisure & Decrease in Corporate	27% 12
Decrease in Business/Corporate Guests	16% 7
Increase in Business/Corporate Guests	11% 5
Other	20% 9

If you could alter the make-up of the majority of your typical guests, which group of guests would you like more of?

	Total n= 86
Business travelers in a group	38% 33
Business travelers <i>not</i> in a group	44% 38
Sports and event travelers	6% 5
Leisure Travelers	8% 7
New or potential Jacksonville residents	4% 3

For the second half of this year, Q3 and Q4, what times of the week are shaping up to be the busiest for your hotel?

	Total n= 87
Midweek (Tuesday – Thursday nights)	24% 21
Weekend (Friday – Saturday nights)	48% 42
Extended Weekends (Thursday – Sunday nights)	15% 13
Other	13% 11

Has your typical busy period changed over the past two years?

	Total n= 86
Yes	47% 40
No	54% 46

How has your typical busy period changed over the past two years? (Recoded from open-ended question)

	Total n= 37
Weekends Busier	46% 17
Midweek Busier	11% 4
Midweek Less Busy	8% 3
Other	35% 13

Note: This was only asked of people who answered “yes” to the previous question.

In terms of accomplishing sales goals in Q3 and Q4 of this year, do you consider your establishment to be...

	Total n= 86
Behind pace	16% 14
On pace	54% 46
Ahead of pace	30% 26

Sales goals in Q3 and Q4 of 2022 * Hotel Type

	Economy n=9	Midscale n=12	Upper Midscale n=30	Upscale n=22	Upper Upscale n=8
Behind pace	22% 2	17% 2	10% 3	14% 3	50% 4
On pace	44% 4	67% 8	43% 13	64% 14	50% 4
Ahead of pace	33% 3	17% 2	47% 14	23% 5	- 0

Sales goals in Q3 and Q4 of 2022 * Area of Town

	Urban Core	Beaches	Southside	Northside	Mandarin	Westside
Behind pace	50% 2	24% 4	21% 6	11% 2	- 0	- 0
On pace	25% 1	35% 6	59% 17	63% 12	60% 3	58% 7
Ahead of pace	25% 1	41% 7	21% 6	26% 5	40% 2	42% 5

With regard to those Q3 and Q4 sales goals, would you like support from Visit Jacksonville?

	Total n= 14
Yes	71% 10
No	14% 2
Maybe	14% 2

Note: This was only asked of people who answered “Behind pace” to the previous question.

What type of support would you want from Visit Jacksonville to accomplish your goals? (Recoded from open-ended question)

	Total n= 6
Leads	50% 3
Marketing	33% 2
Highlight other areas than Downtown	17% 1

Note: This was only asked of people who answered “yes” to the previous question.

In terms of accomplishing sales goals in Q1 and Q2 of next calendar year (2023), do you consider your establishment to be...

	Total n= 77
Behind pace	16% 12
On pace	66% 51
Ahead of pace	18% 14

Sales goals in Q1 and Q2 of 2023 * Hotel Type

	Economy n=7	Midscale n=12	Upper Midscale n=27	Upscale n=19	Upper Upscale n=7
Behind pace	14% 1	33% 4	7% 2	16% 3	29% 2
On pace	43% 3	50% 6	74% 20	69% 13	57% 4
Ahead of pace	43% 3	17% 2	19% 5	16% 3	14% 1

Sales goals in Q1 and Q2 of 2023 * Area of Town

	Urban Core	Beaches	Southside	Northside	Mandarin	Westside
Behind pace	- 0	19% 3	17% 4	16% 3	20% 1	10% 1
On pace	100% 4	50% 8	79% 19	67% 12	60% 3	50% 5
Ahead of pace	- 0	31% 5	4% 1	16% 3	20% 1	40% 4

With regard to those Q1 and Q2 sales goals for next year (2023), would you like support from Visit Jacksonville?

	Total n= 12
Yes	83% 10
No	8% 1
Maybe	8% 1

Note: This was only asked of people who answered “Behind pace” to the previous question.

**What type of support would you want from Visit Jacksonville to accomplish your goals?
(Recoded from open-ended question)**

	Total n= 10
Marketing	40% 4
Leads	20% 2
Other	40% 4

Note: This was only asked of people who answered “yes” to the previous question.

Currently, Visit Jacksonville offers a variety of resources to assist and support hoteliers like yourself. Which of the following support resources would be most helpful in accomplishing your sales goals?

	Total n= 82
Concessions (welcome signage, airport transfers, etc.)	9% 7
Room night grants	7% 6
Monetary promotions for smaller groups	16% 13
Tradeshaw co-ops for hotel sales staff	7% 6
Marketing and social media assistance for large groups	40% 33
Other	21% 7

Other than the resources listed above, what additional ways could Visit Jacksonville help you to accomplish your sales goals? (Recoded from open-ended question)

	Total n= 43
More Marketing	26% 11
Nothing/Doing a good job already	16% 7
Improve Jacksonville as a tourist destination	16% 7
More literature about things to do around town	14% 6
Other	28% 12