



**NAPLES · MARCO ISLAND
EVERGLADESSM**

FLORIDA'S PARADISE COAST

April 2024 Monthly Visitor Dashboard

TABLE OF CONTENTS

1. **Monthly Snapshot:** pg. 3 - 4
2. **Executive Summary:** pgs. 5 - 19
 - a) Monthly: pgs. 5 - 12
 - b) Fiscal Year-to-Date (FYTD): pgs. 13 - 19
3. **Detailed Findings:** pgs. 20 - 41
 - a) Pre-Visit: pgs. 20 - 27
 - b) Travel Party Profile: pgs. 28 - 33
 - c) Trip Experience: pgs. 34 - 39
 - d) Post-Trip Evaluation: pgs. 40 – 41
4. **Destination Comparisons:** pgs. 42-45 (awaiting STR Monthly)
5. **Industry Data:** pgs. 46 - 49



1

MONTHLY
SNAPSHOT

- In April 2024, overall occupancy rate increased 4.4% compared to April 2023.
- Although not quite as large of an increase as seen in recent months, the average daily rate (ADR) still saw a significant increase yet again, up 10.6% year-over-year, which resulted in a revenue per available room (RevPAR) of \$243, up from \$211 last year.
- Direct spending by visitors and total economic impact of tourism increased by 9.3% and 9.2%, respectively. The total economic impact of tourism is currently up 12.7% so far fiscal-year-to-date, just past the halfway point of the 2024 fiscal year.
- Advertising recall increased from 31% to 41% among all visitors. 22% of all visitors recalled seeing an ad for Florida's Paradise Coast on social media prior to their visit.
- Satisfaction metrics, specifically "top-box" scores, saw sharp year-over-year as well as month-over-month increases across the board in April 2024, potentially due to both hurricane recovery as well as a significantly lower ADR compared to previous months.
- The Midwest & the Northeast continued to be the main regions of origin for out-of-state visitors, accounting for nearly half of all visitors. International origins such as Canada, Germany, the UK, and others accounted for 14% of all visitors in April 2024.



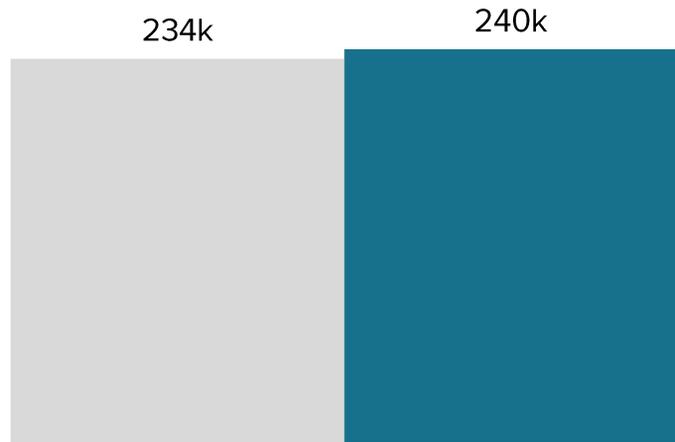
2a

EXECUTIVE
MONTHLY
SUMMARY

APRIL 2024 | VISITATION & ROOM NIGHTS

VISITORS

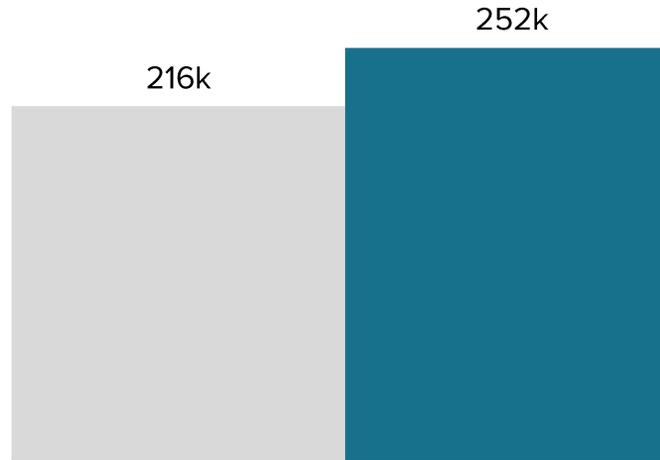
239,900



+ 2.5% from 2023

ROOM NIGHTS

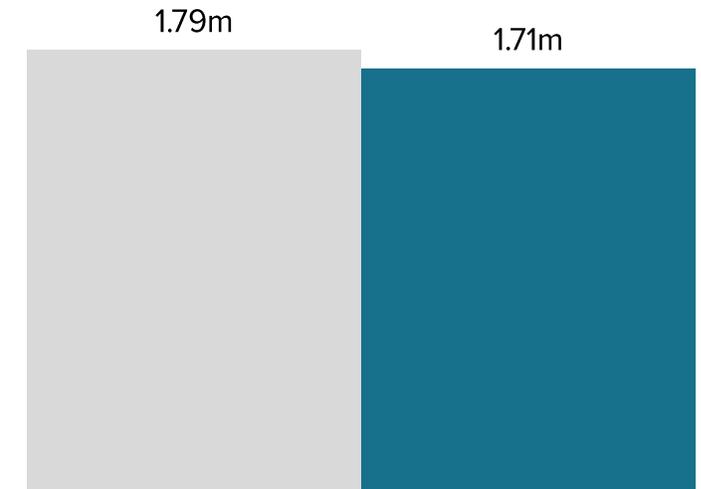
297,800



+ 16.4% from 2023

VISITOR DAYS

1,712,900

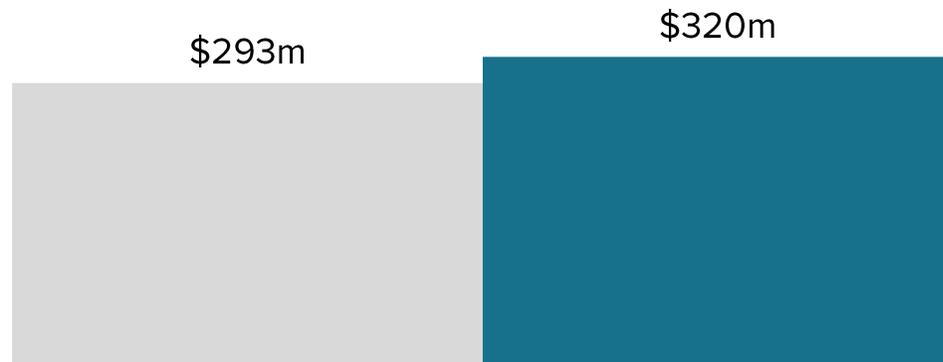


- 4.2% from 2023

■ Apr-23 ■ Apr-24

DIRECT SPENDING

\$320,036,700



+ 9.3% from 2023

ECONOMIC IMPACT

\$443,570,900



+ 9.2% from 2023

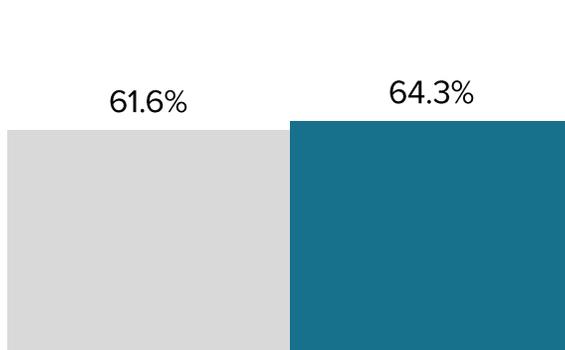
■ Apr-23 ■ Apr-24

¹The IMPLAN multiplier for Collier County was 1.388 for 2023 and is 1.386 in 2024.

APRIL 2024 | OVERALL LODGING METRICS^{1,2}

OCCUPANCY RATE

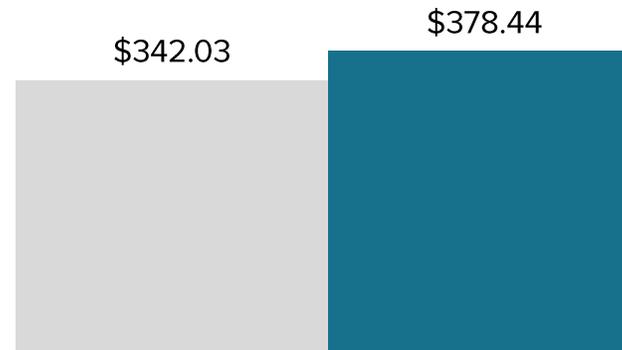
64.3%



+ **4.4%** from 2023

AVERAGE DAILY RATE

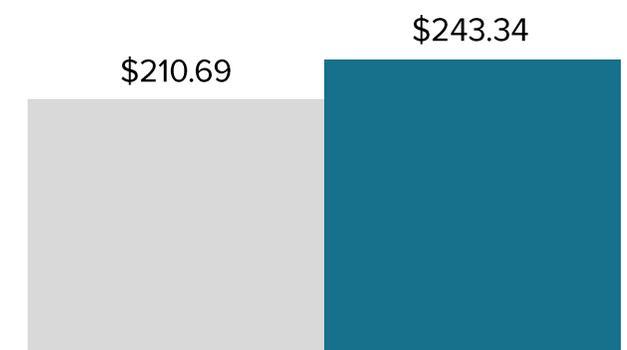
\$378.44



+ **10.6%** from 2023

REVENUE PER AVAILABLE ROOM

\$243.34



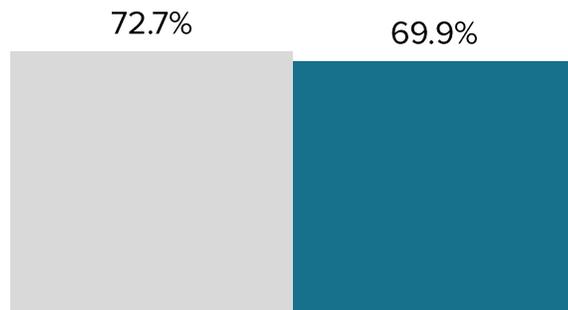
+ **15.5%** from 2023

■ Apr-23 ■ Apr-24

¹ Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.
² Overall Lodging Metrics are reflective of paid accommodations as a whole, including both hotels and vacation rentals within Collier County.

OCCUPANCY RATE

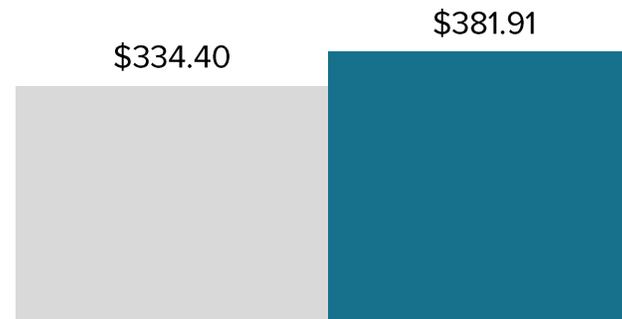
69.9%



- **3.9%** from 2023

AVERAGE DAILY RATE

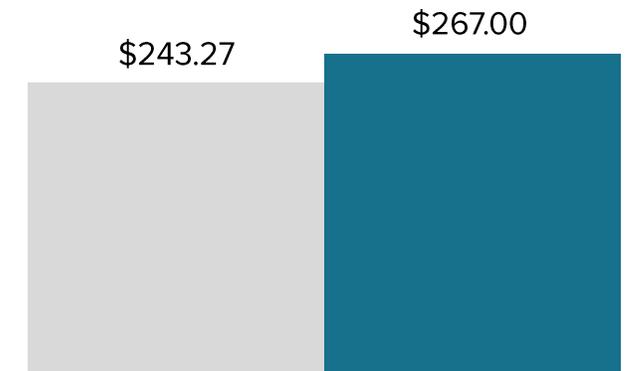
\$381.91



+ **14.2%** from 2023

REVENUE PER AVAILABLE ROOM

\$267.00



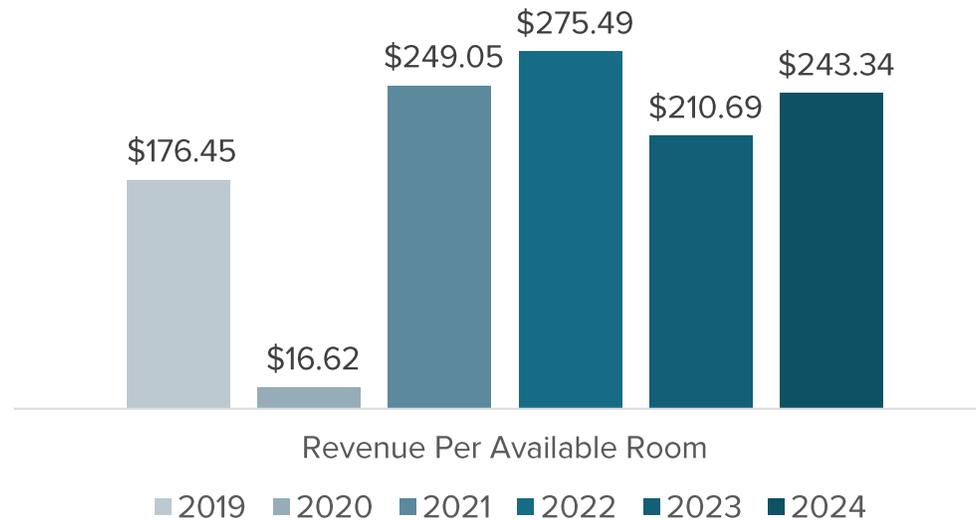
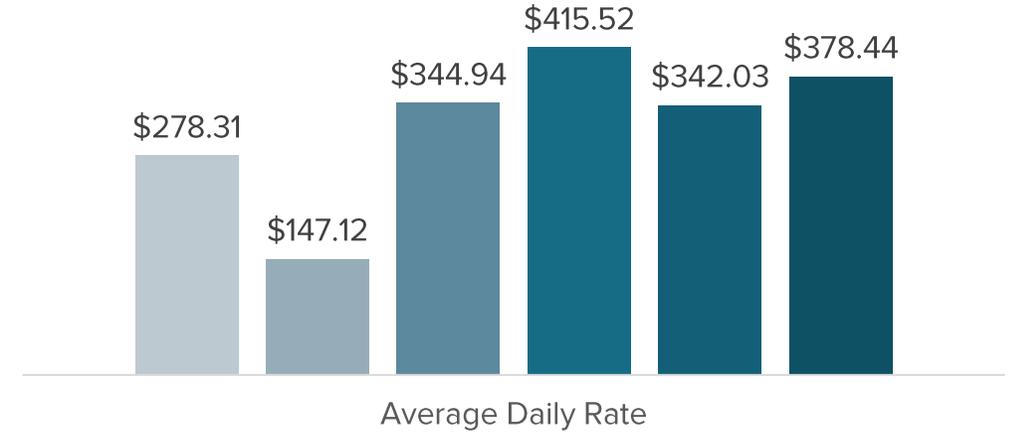
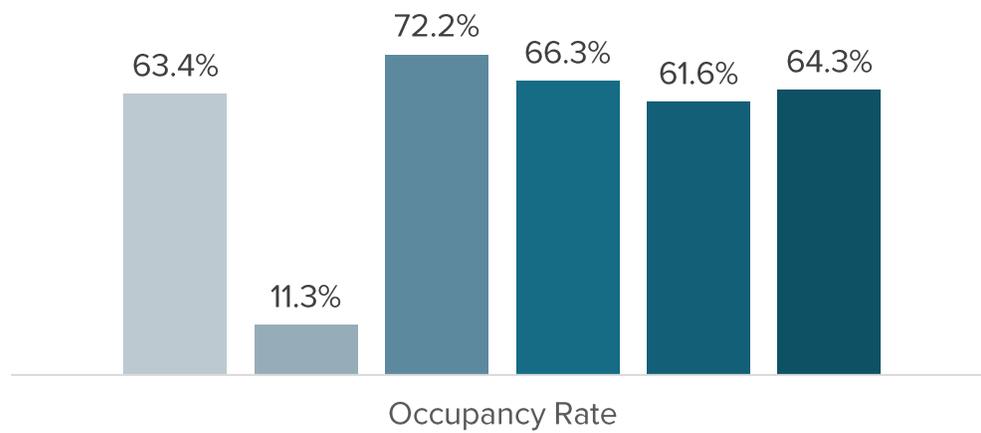
+ **9.8%** from 2023

■ Apr-23 ■ Apr-24

¹Source: STR data

²Lodging metrics on this slide are only reflective of the hotels within Collier County.

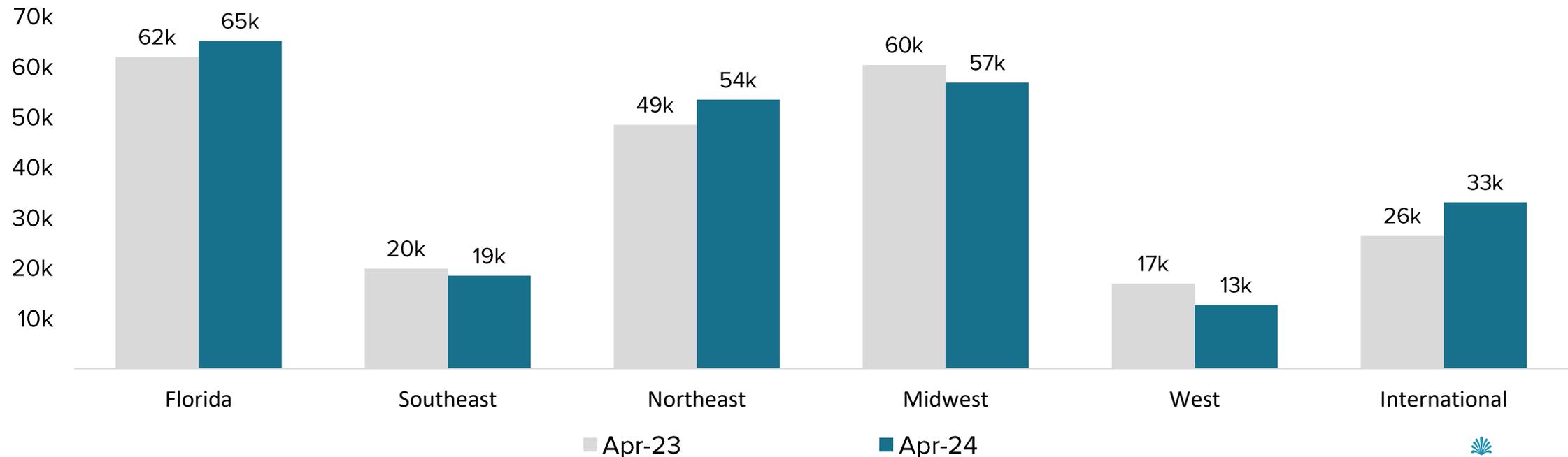
APRIL | OVERALL LODGING METRICS TREND¹



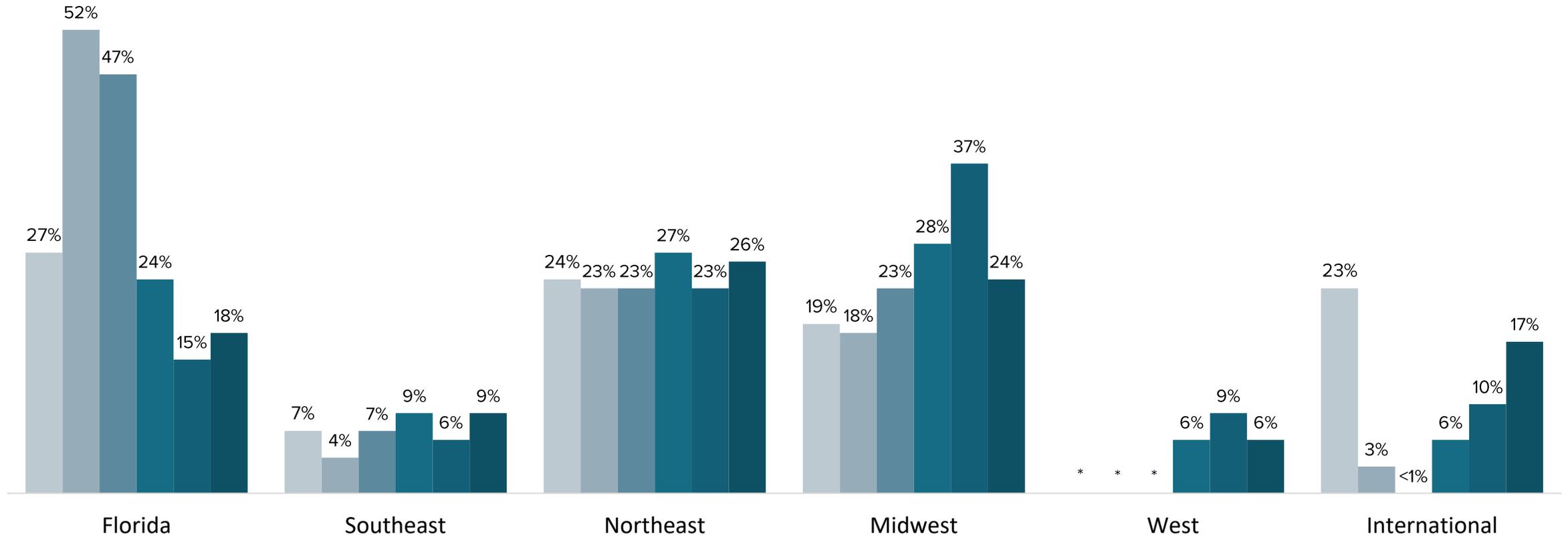
¹Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

FLORIDA VISITORS
65,200

OUT-OF-STATE VISITORS
174,700



APRIL | OVERNIGHT VISITOR ORIGIN TREND



*Note: The “West” was not separated from “Other” before April 2022. Beginning in April 2022, “West” was added and “Other” was changed to “Other International”.

■ Apr-19 ■ Apr-20 ■ Apr-21 ■ Apr-22 ■ Apr-23 ■ Apr-24

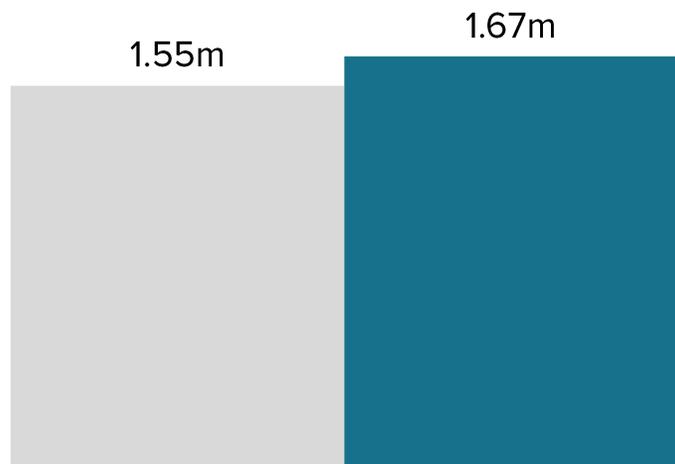


2b

EXECUTIVE
FISCAL
YEAR-TO-DATE
(FYTD)
SUMMARY

FYTD VISITORS

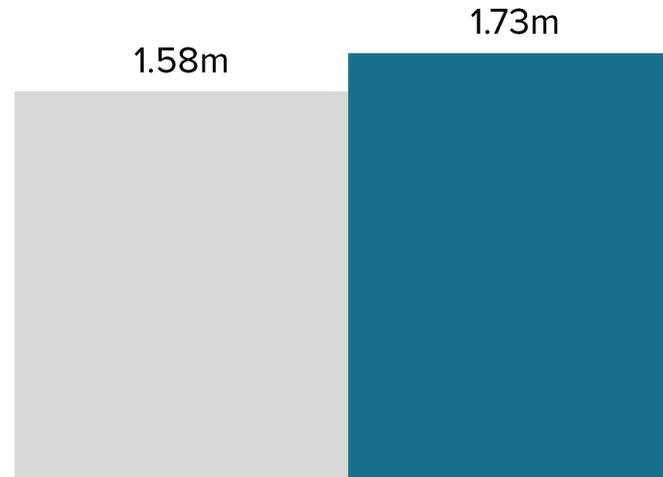
1,667,400



+ **7.7%** from FY23

FYTD ROOM NIGHTS

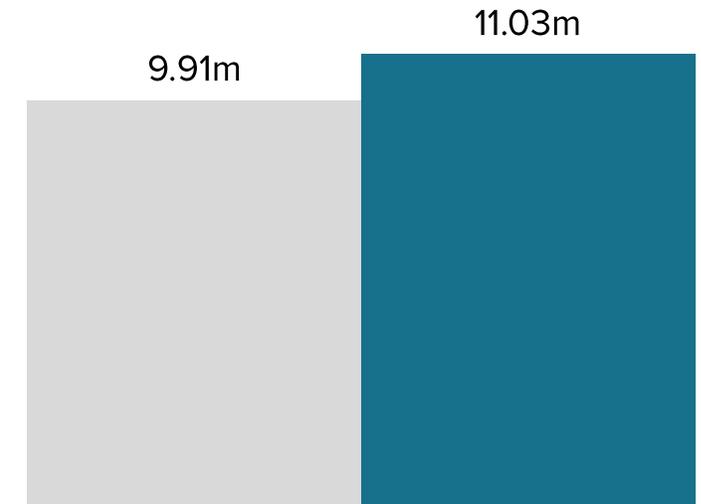
1,733,600



+ **9.8%** from FY23

FYTD VISITOR DAYS

11,030,400



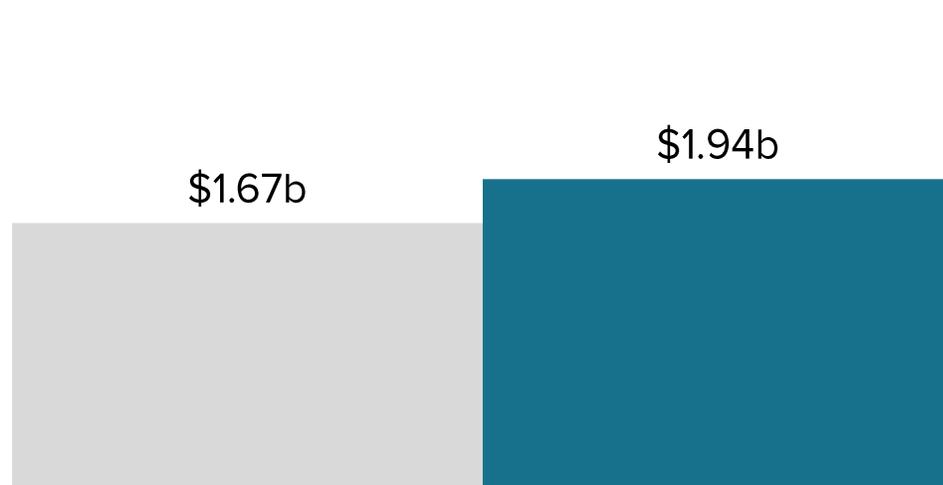
+ **11.3%** from FY23

■ FY23 ■ FY24

FYTD DIRECT SPENDING

\$1,943,331,400

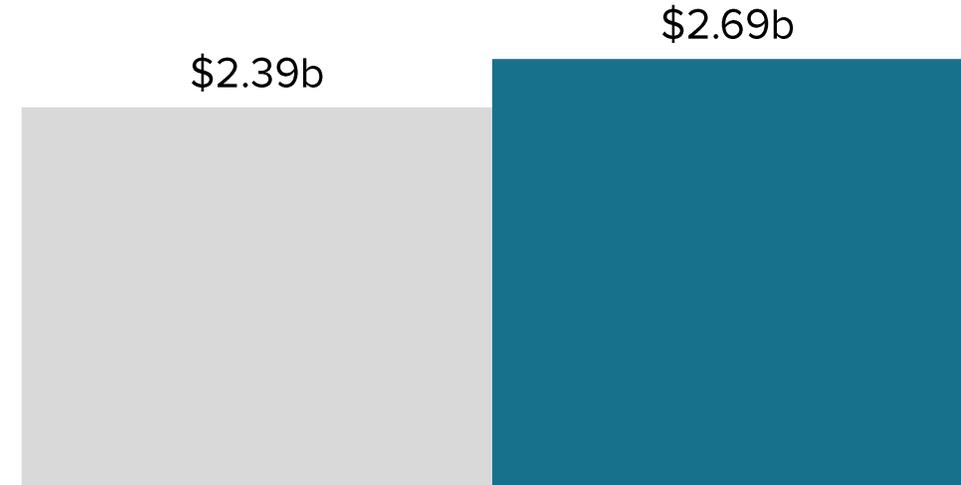
+ 16.5% from FY23



FYTD ECONOMIC IMPACT

\$2,694,649,900

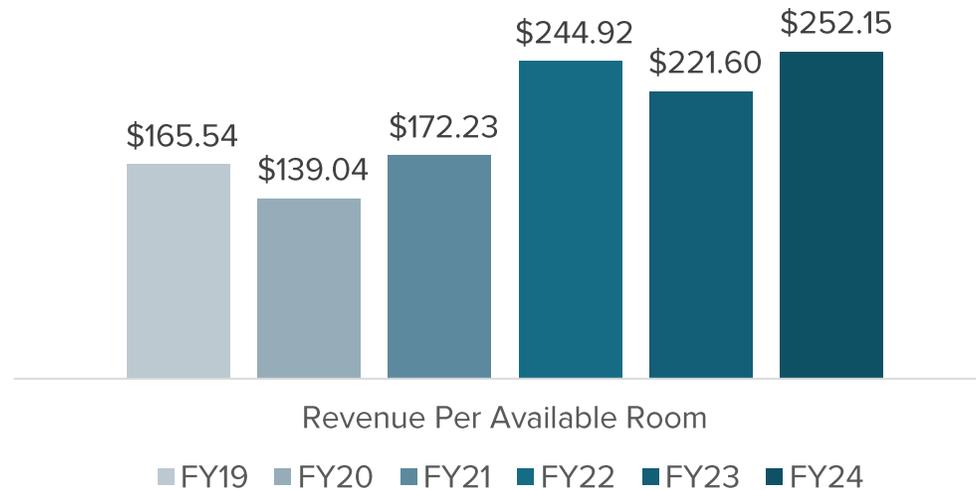
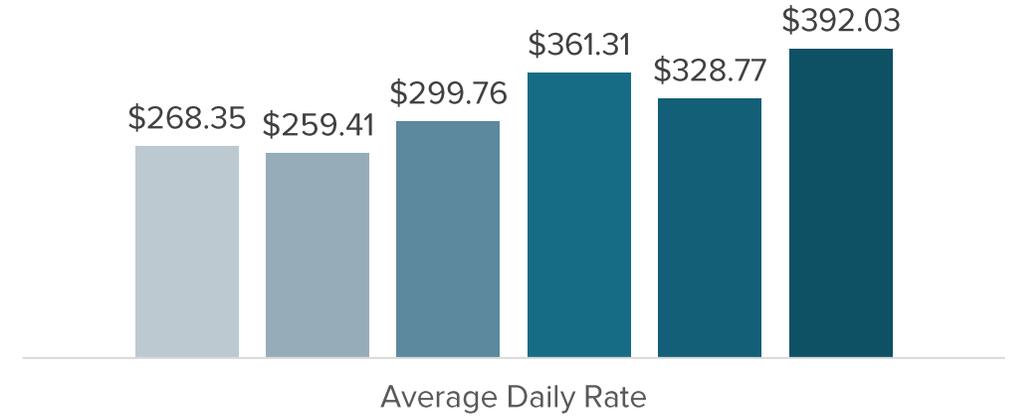
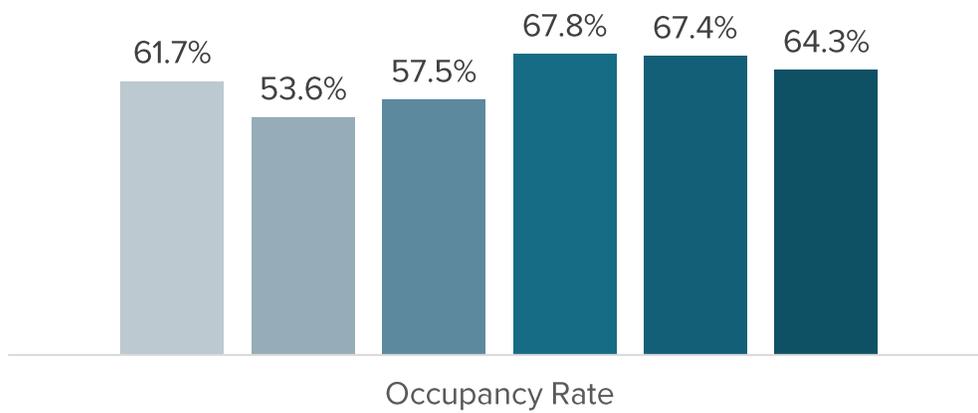
+ 12.7% from FY23¹



■ FY23 ■ FY24

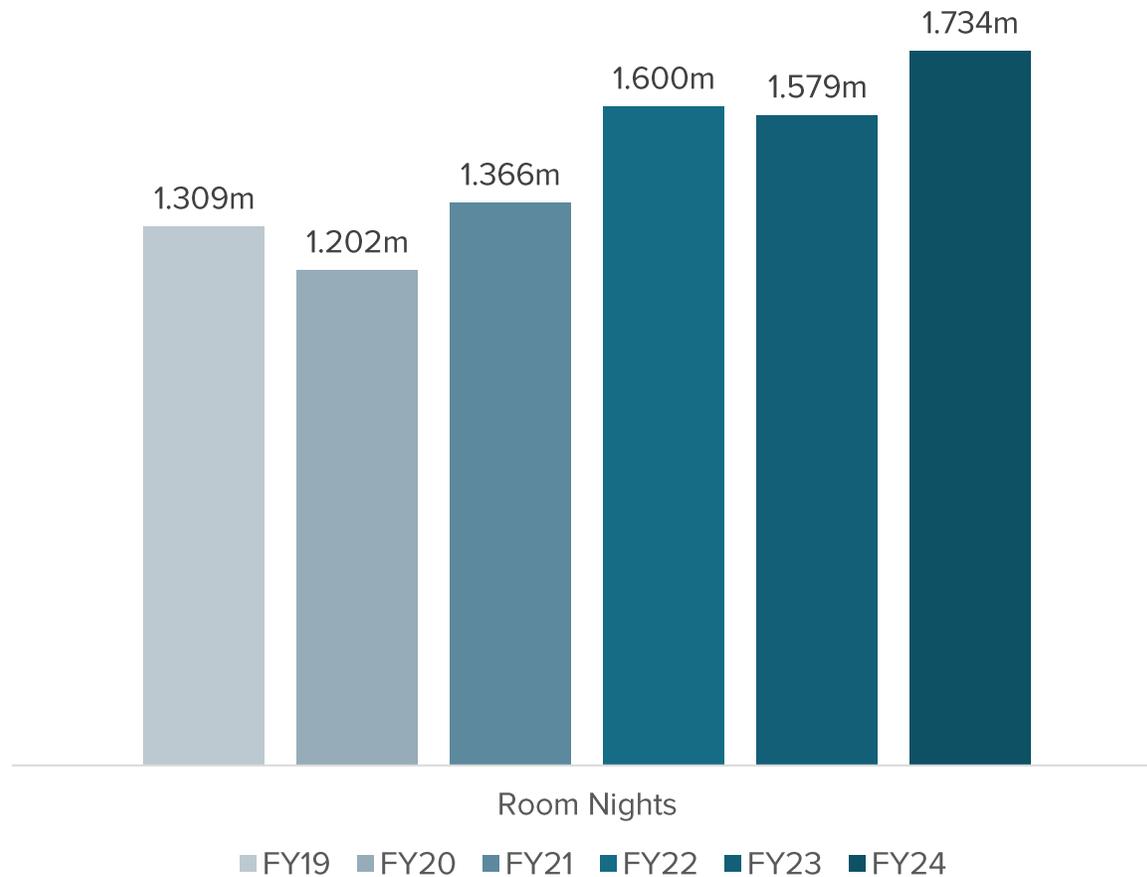
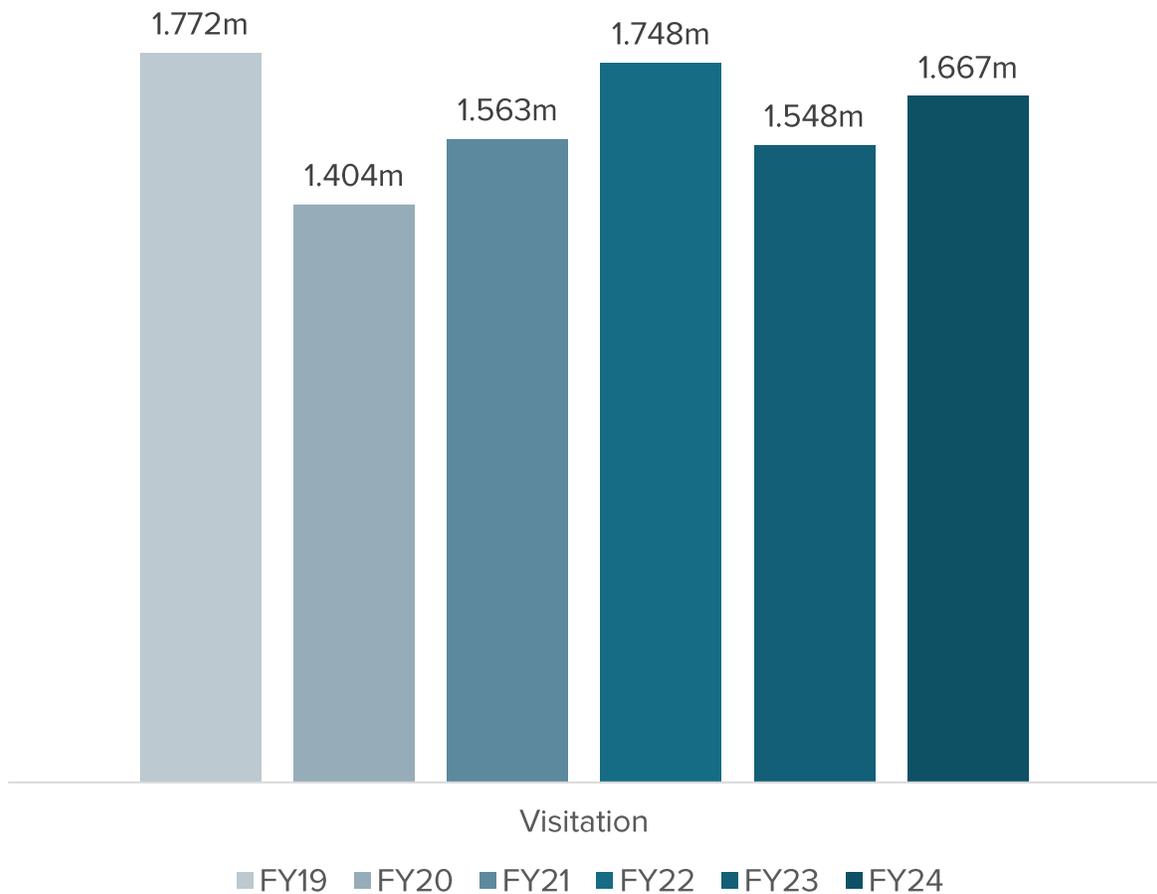
¹The IMPLAN multiplier for Collier County was 1.388 for 2022 and is 1.386 in 2023.

FYTD | 2019-2024 OVERALL LODGING METRICS¹



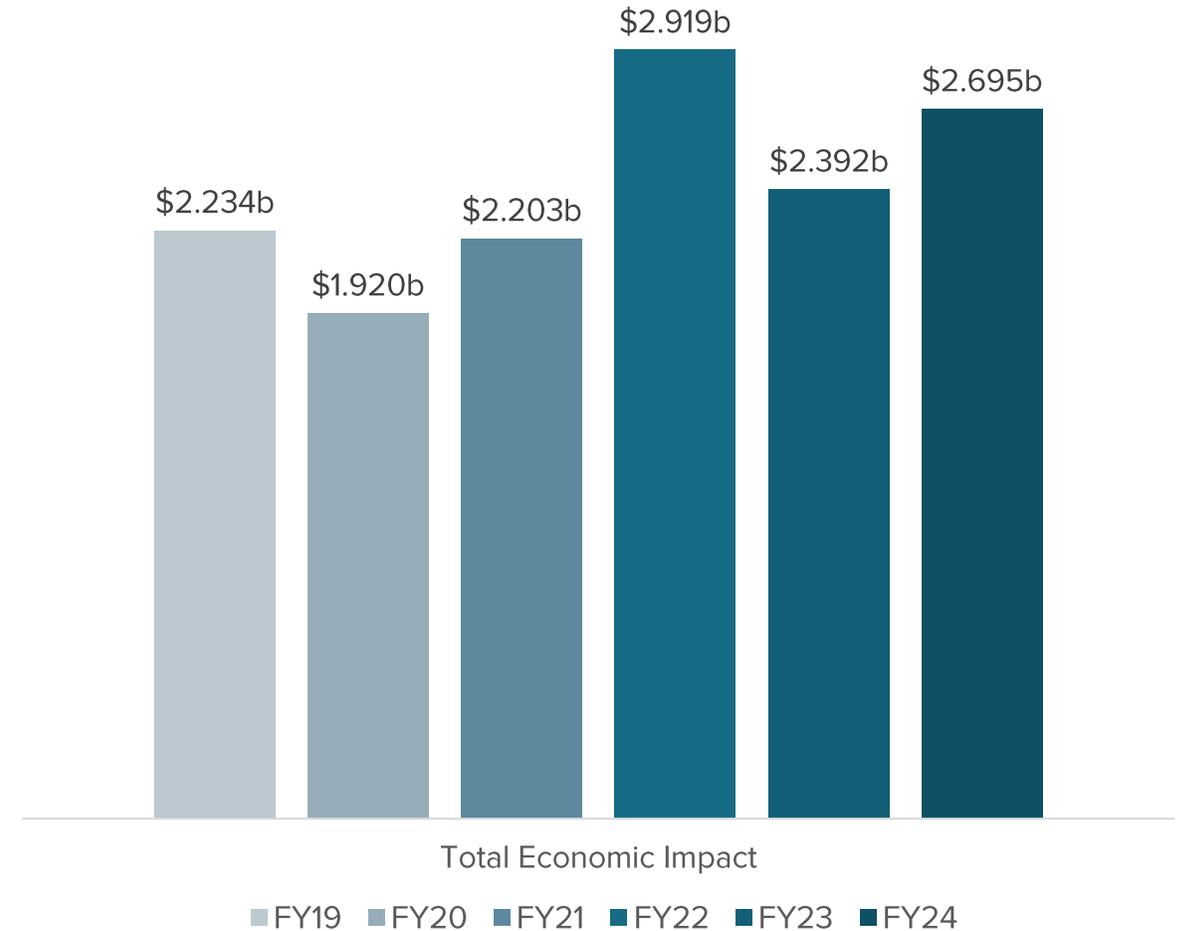
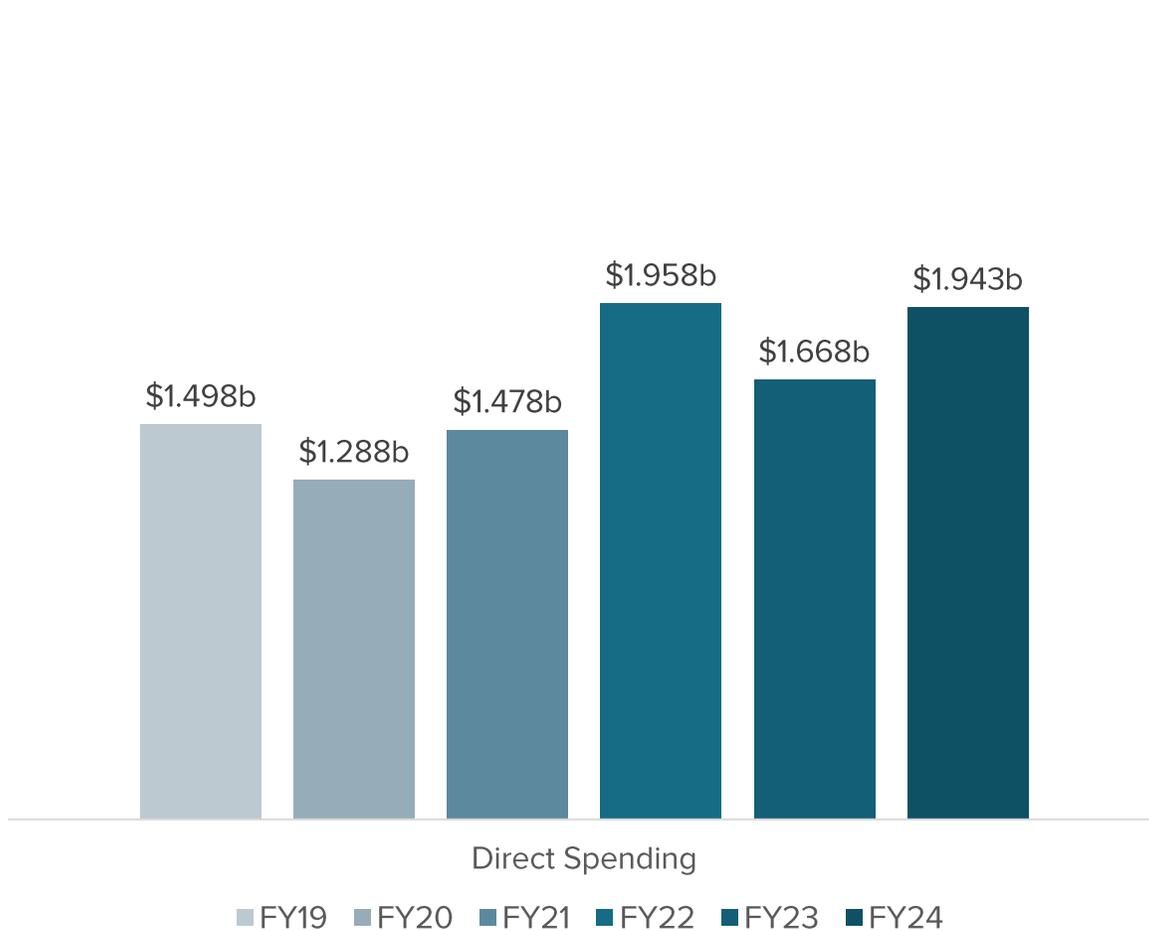
¹Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

FYTD | 2019-2024 VISITATION & ROOM NIGHTS¹



¹Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

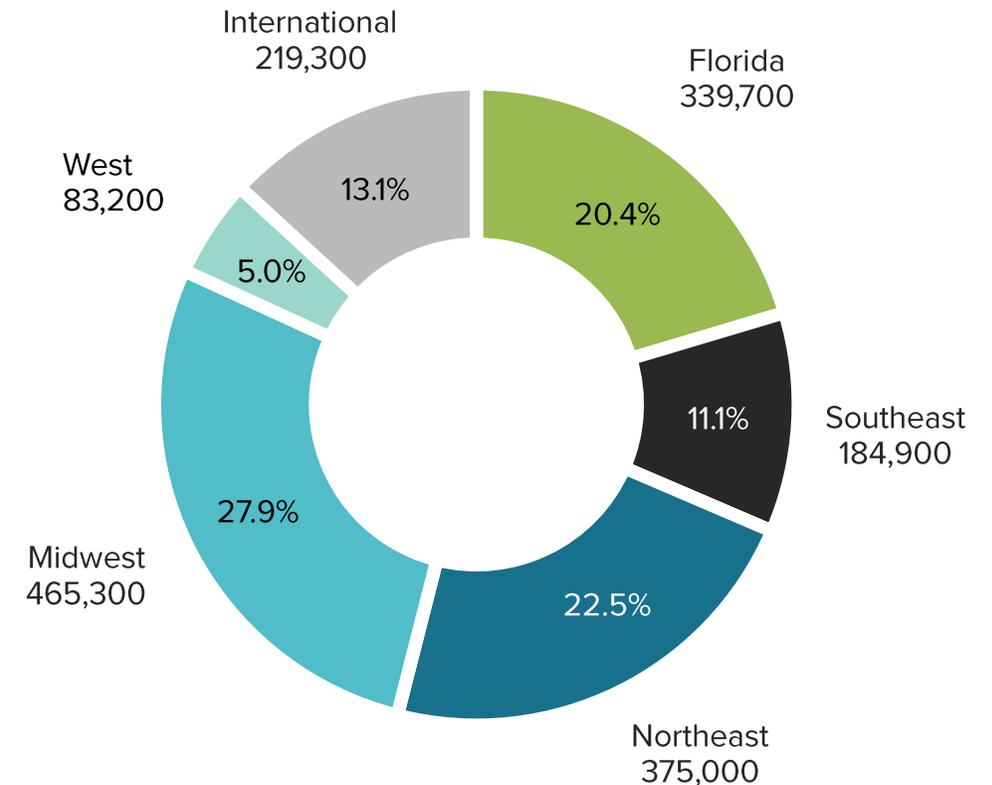
FYTD | 2019-2024 SPENDING & ECONOMIC IMPACT¹



¹Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

FYTD | VISITOR ORIGIN

Region	FYTD 2023		FYTD 2024		Percent Change (±Δ%)	
	# Visitors	% Share	# Visitors	% Share	# Visitors	% Share
Florida	407,300	26.3%	339,700	20.4%	-16.6%	-22.6%
Southeast	138,500	8.9%	184,900	11.1%	33.5%	24.0%
Northeast	316,700	20.5%	375,000	22.5%	18.4%	9.9%
Midwest	441,100	28.5%	465,300	27.9%	5.5%	-2.1%
West	71,500	4.6%	83,200	5.0%	16.4%	8.0%
Canada	71,900	4.6%	89,200	5.3%	24.1%	15.2%
Europe	60,200	3.9%	92,400	5.5%	53.5%	42.5%
C/S America	22,600	1.5%	18,300	1.1%	-19.0%	-24.8%
Other	18,400	1.2%	19,400	1.2%	5.4%	-2.1%
Total	1,548,200	100.0%	1,667,400	100.0%		

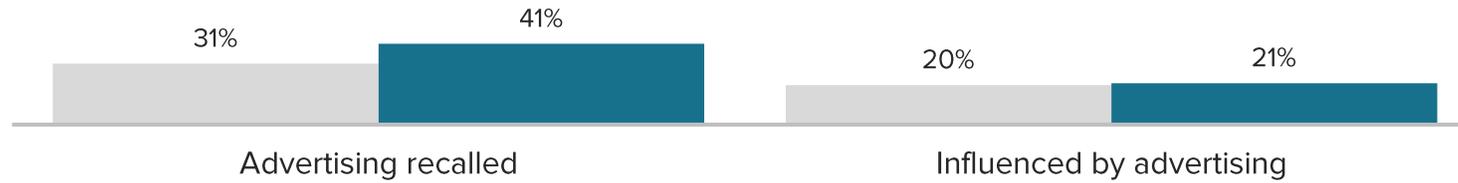




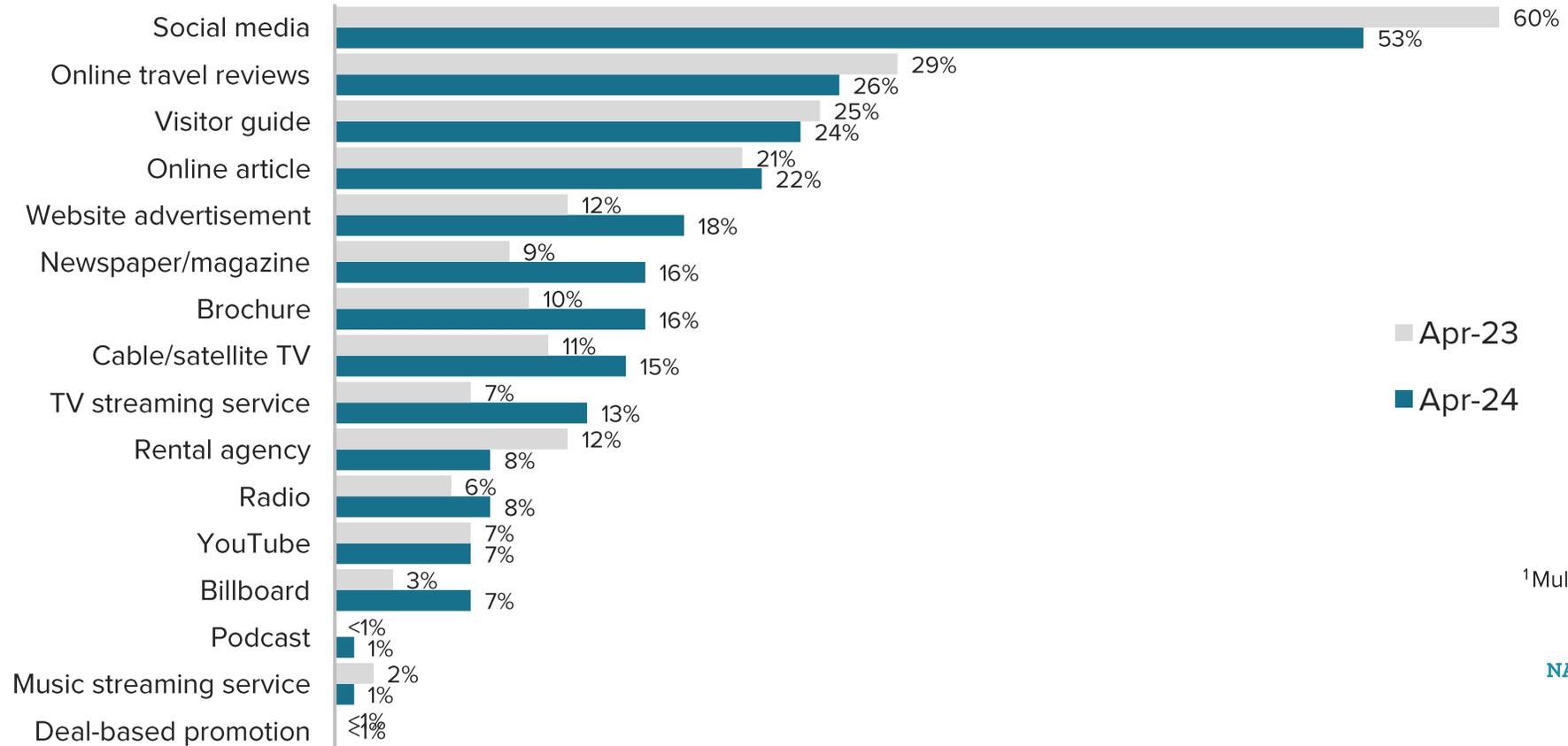
3a

DETAILED FINDINGS:
PRE-VISIT

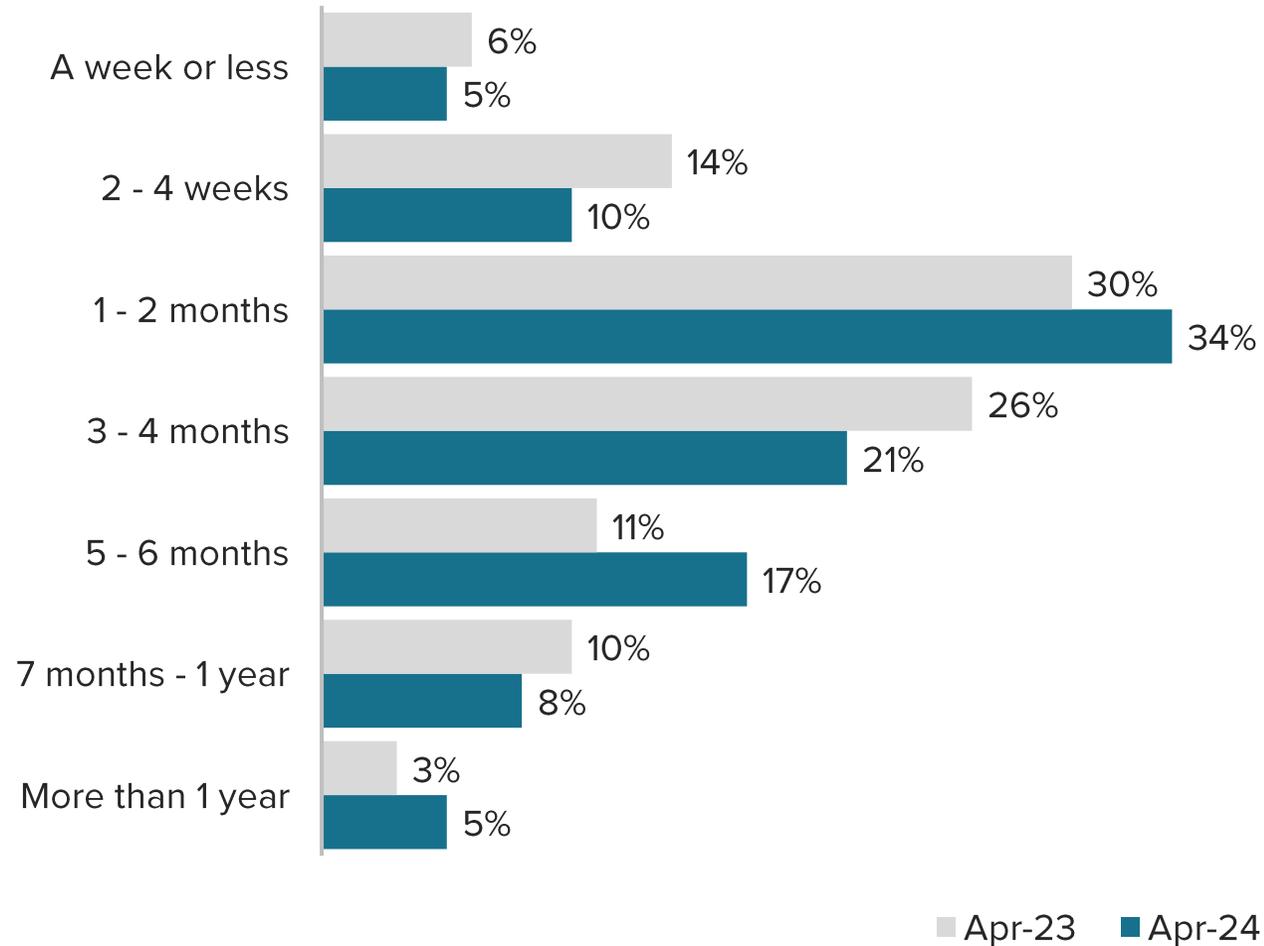
DETAILED FINDINGS | ADVERTISING RECALL¹



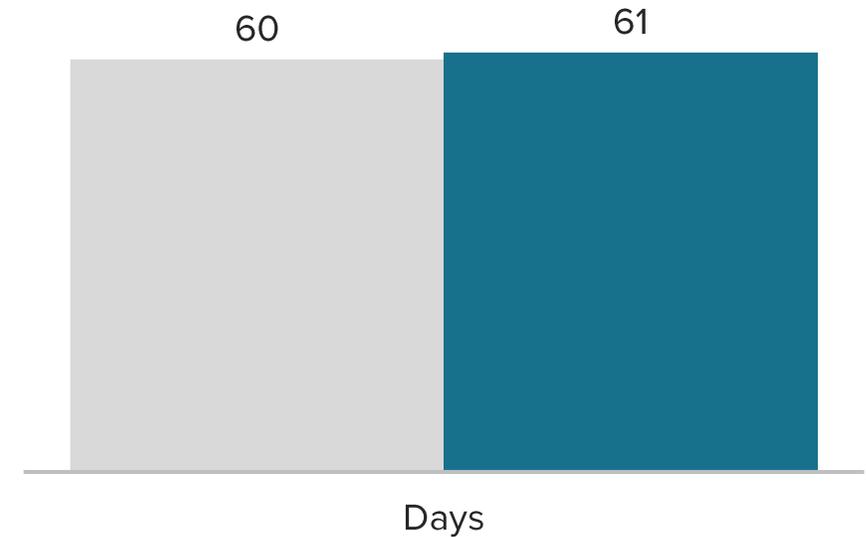
Base: % who recalled ads prior to their trip



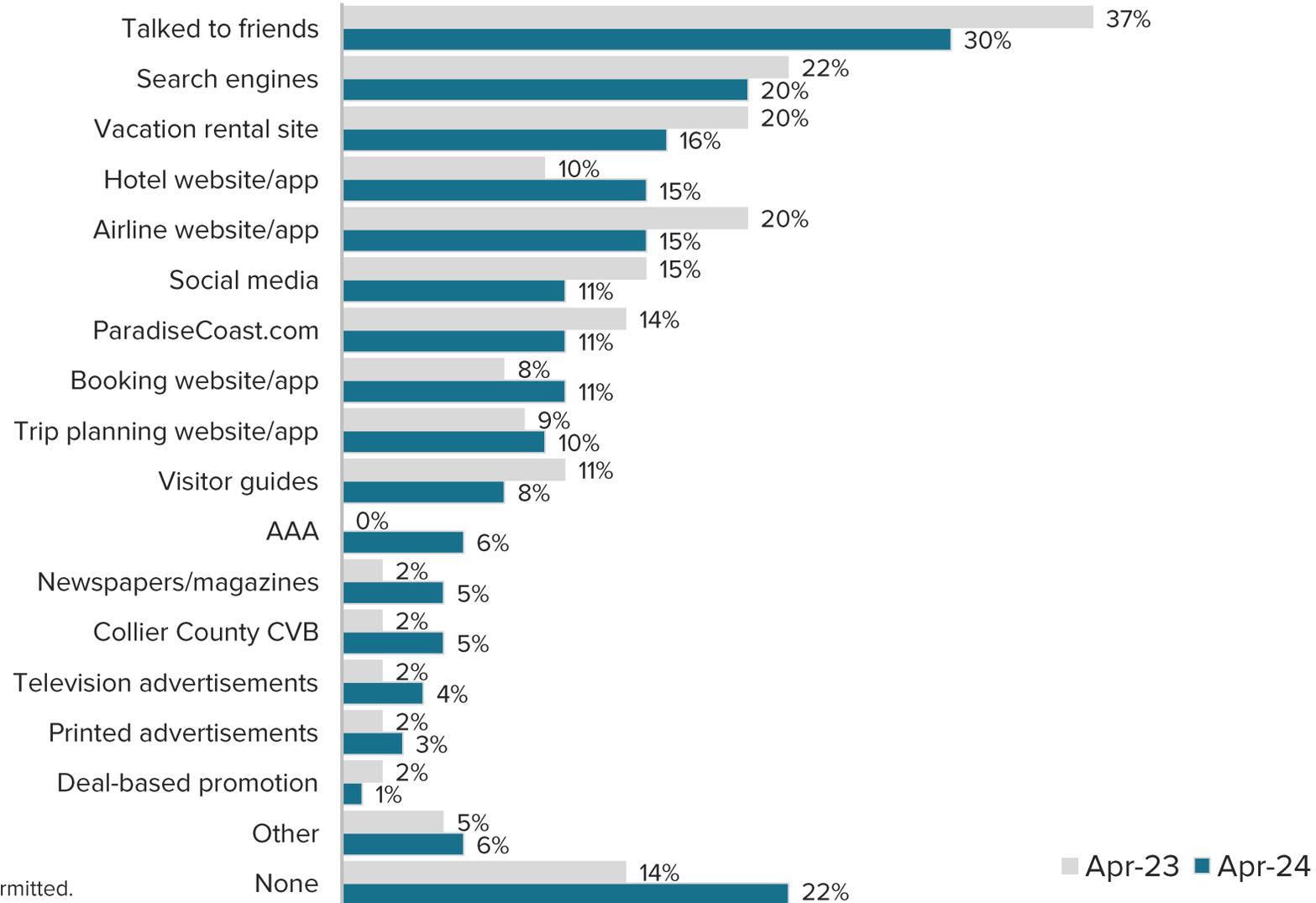
¹Multiple responses permitted.



Median Trip Planning Time

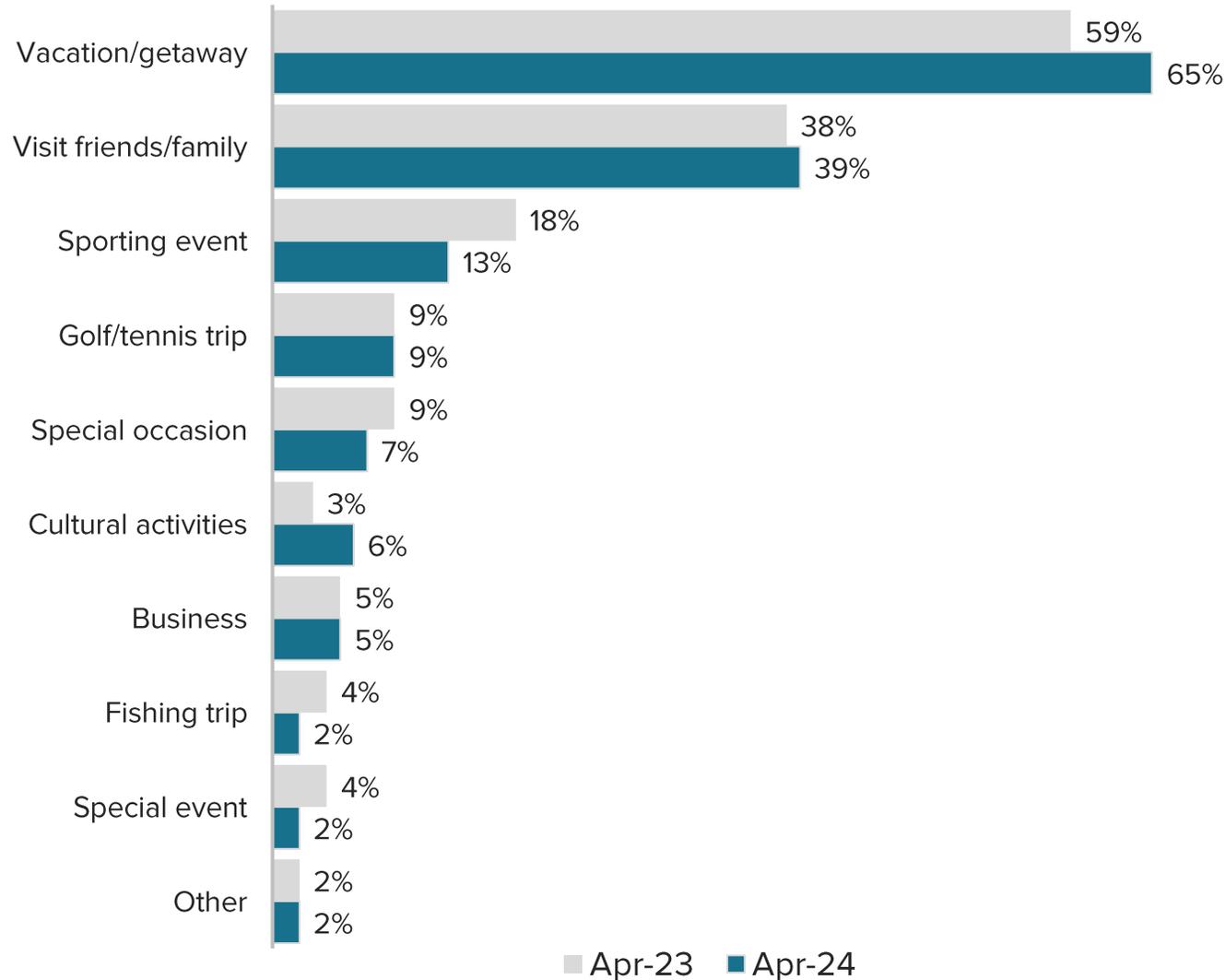


DETAILED FINDINGS | TRIP PLANNING SOURCES¹



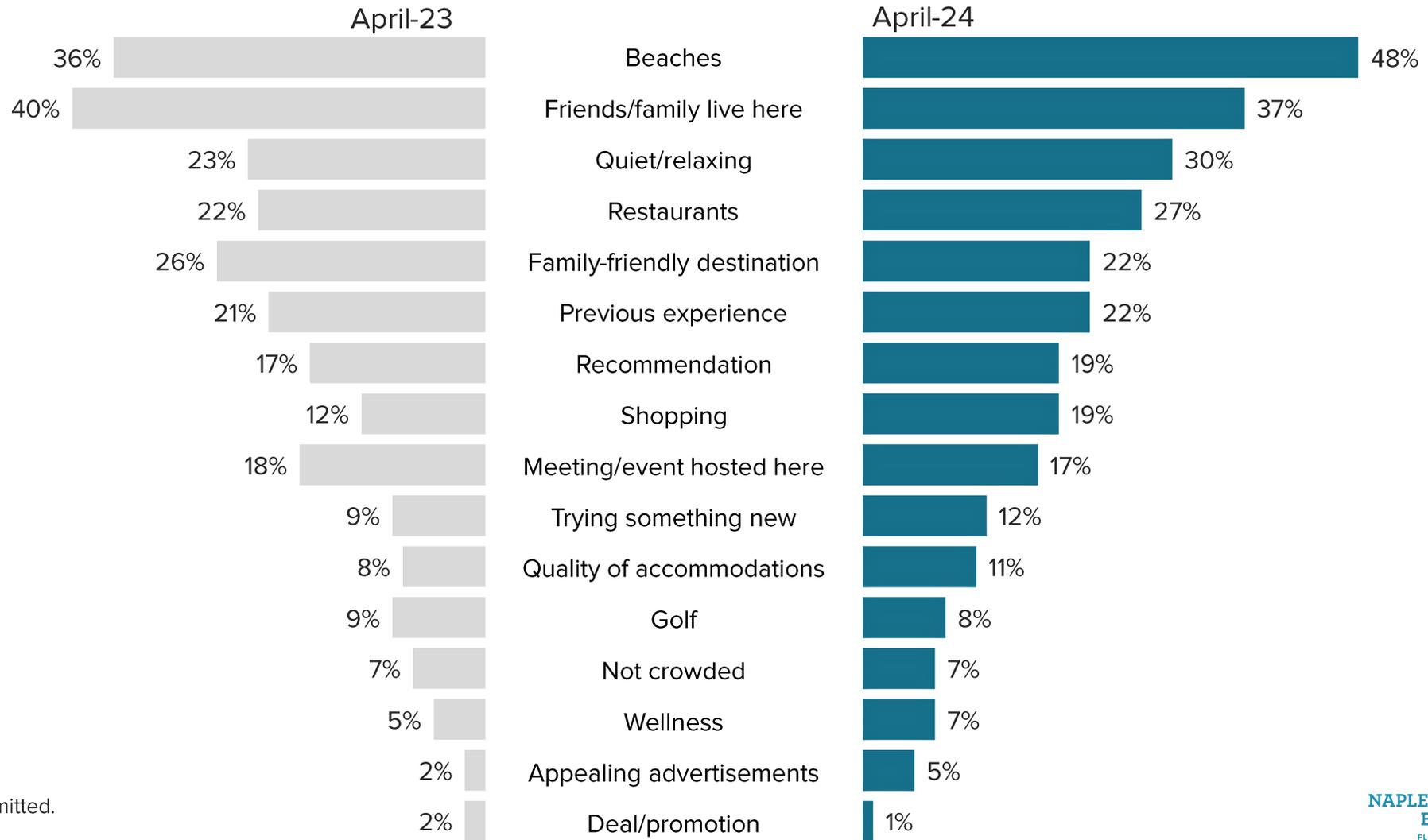
¹Multiple responses permitted.

DETAILED FINDINGS | REASONS FOR VISITING¹



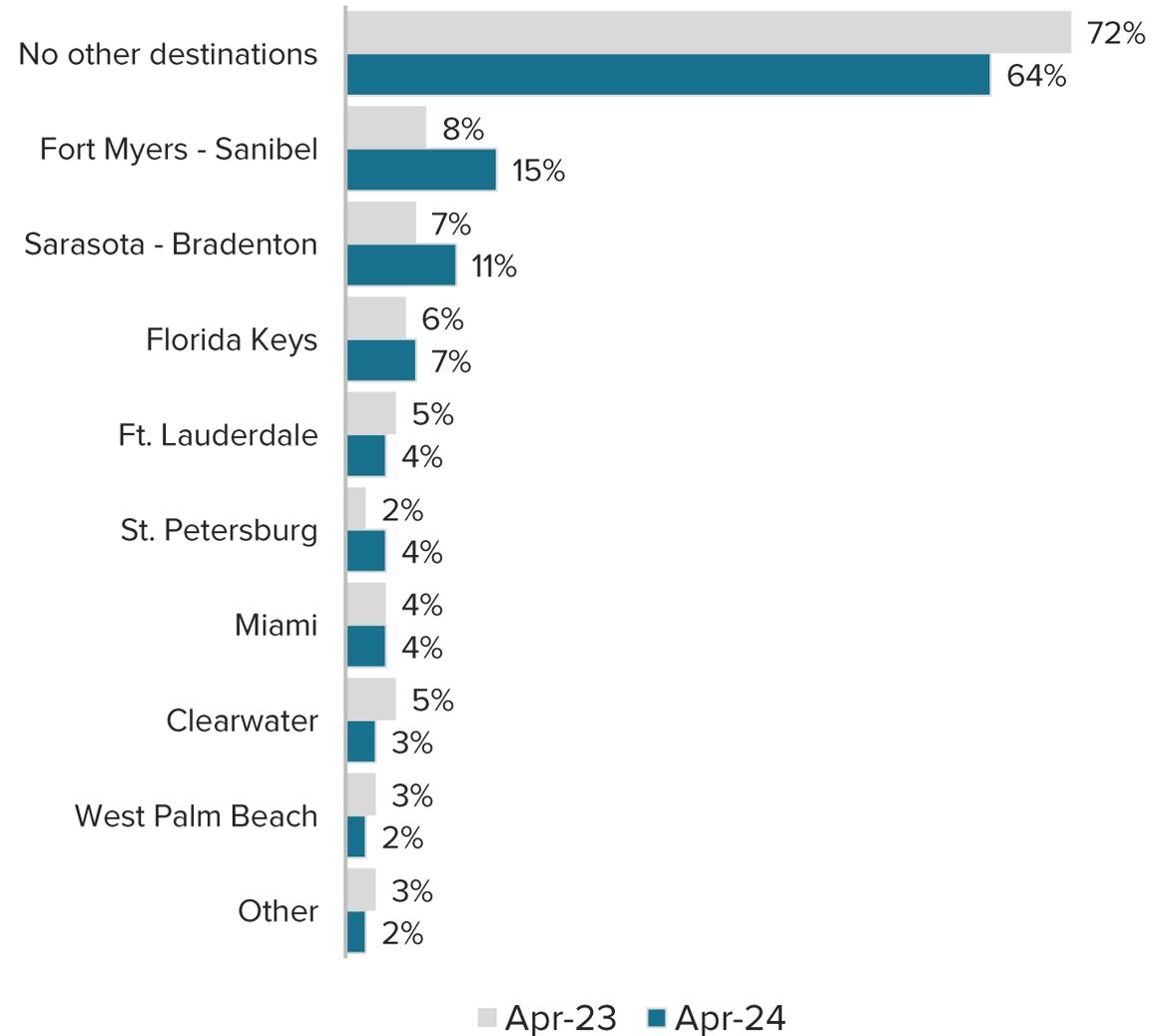
¹Multiple responses permitted.

DETAILED FINDINGS | REASONS FOR CHOOSING¹



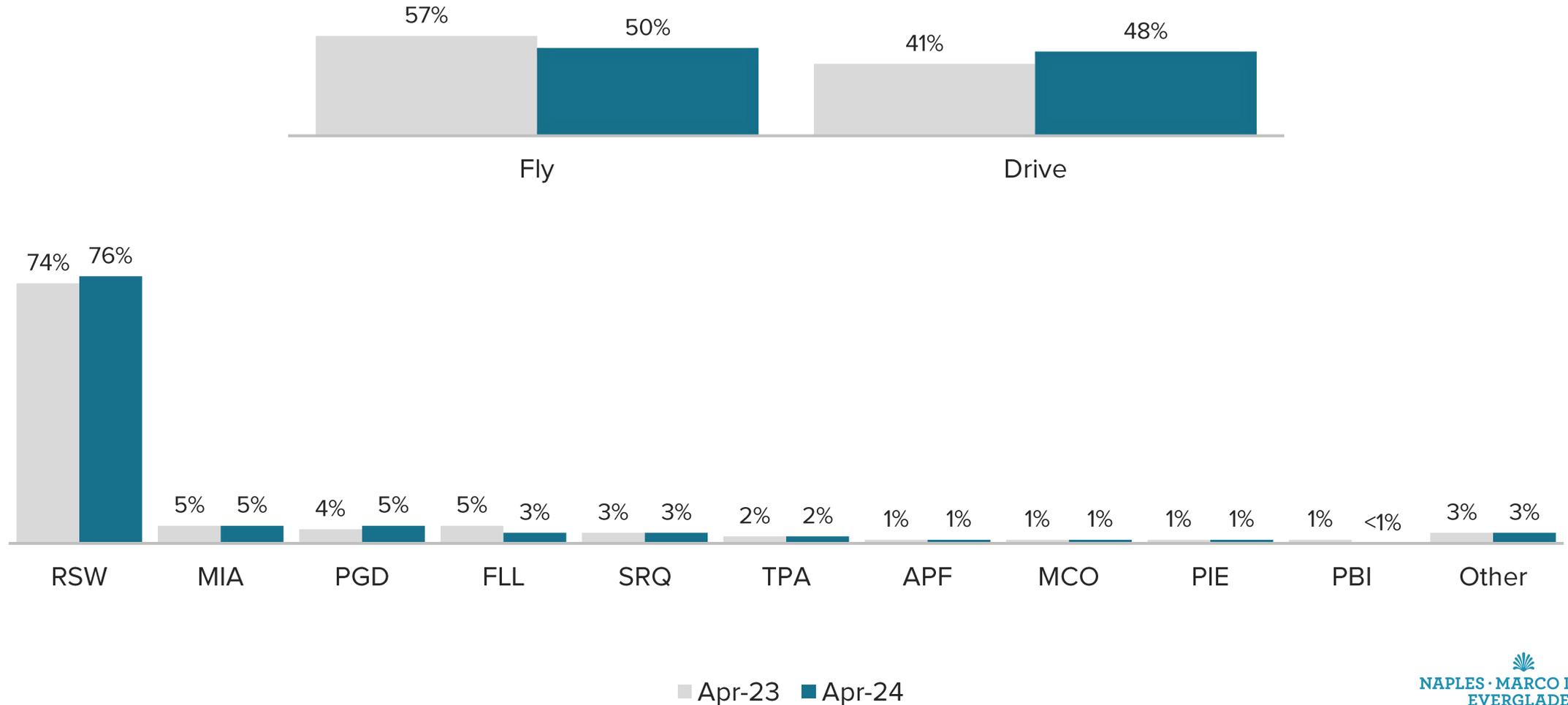
¹Multiple responses permitted.

DETAILED FINDINGS | DESTINATIONS CONSIDERED¹



¹Multiple responses permitted.

DETAILED FINDINGS | TRANSPORTATION

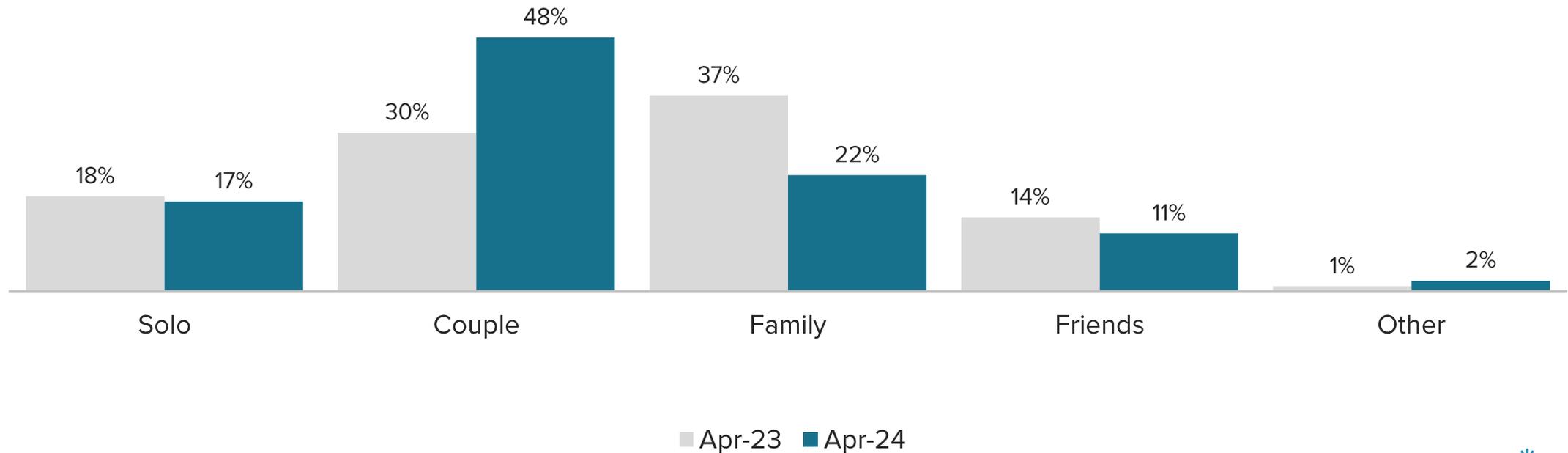




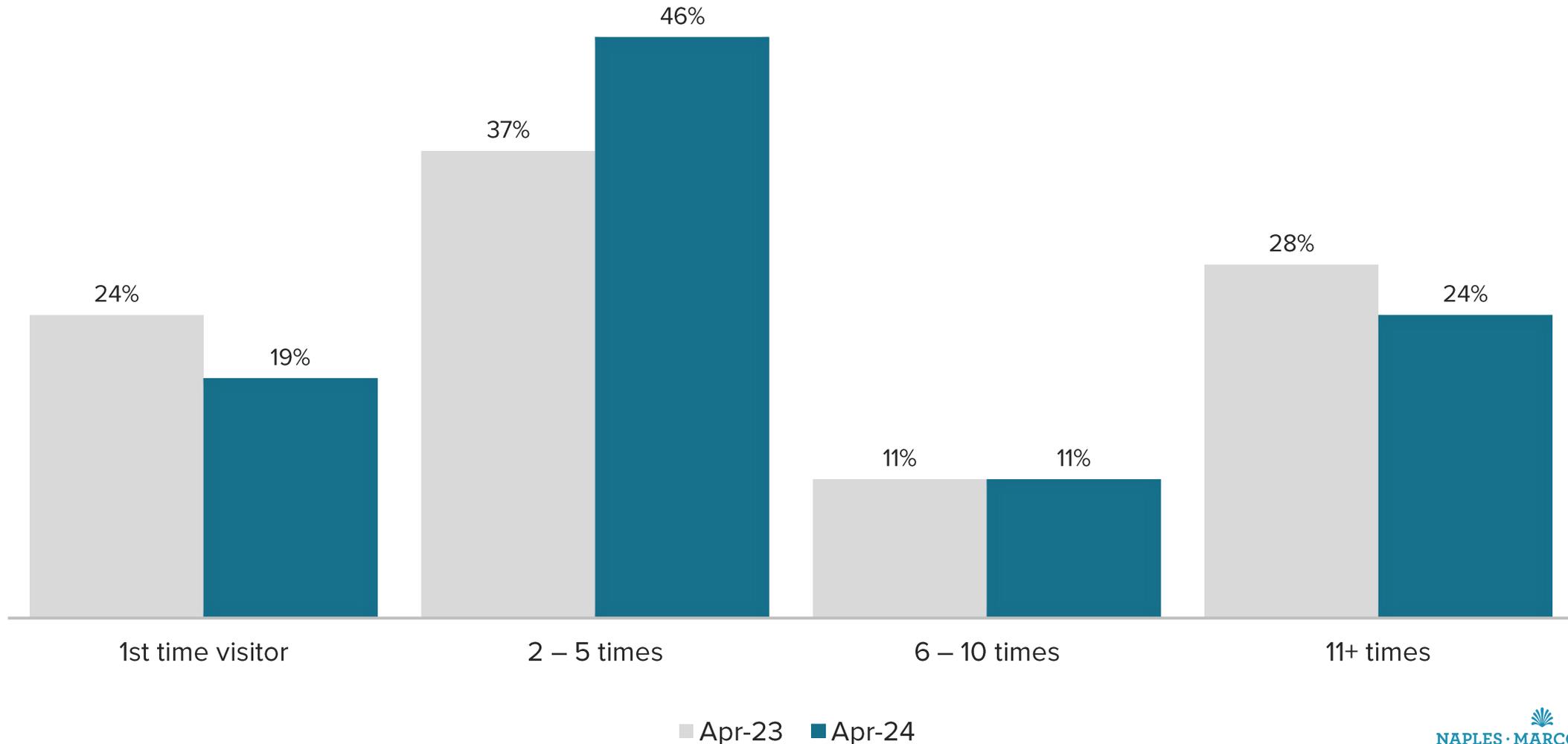
3b

DETAILED FINDINGS:
TRAVEL PARTY
PROFILE

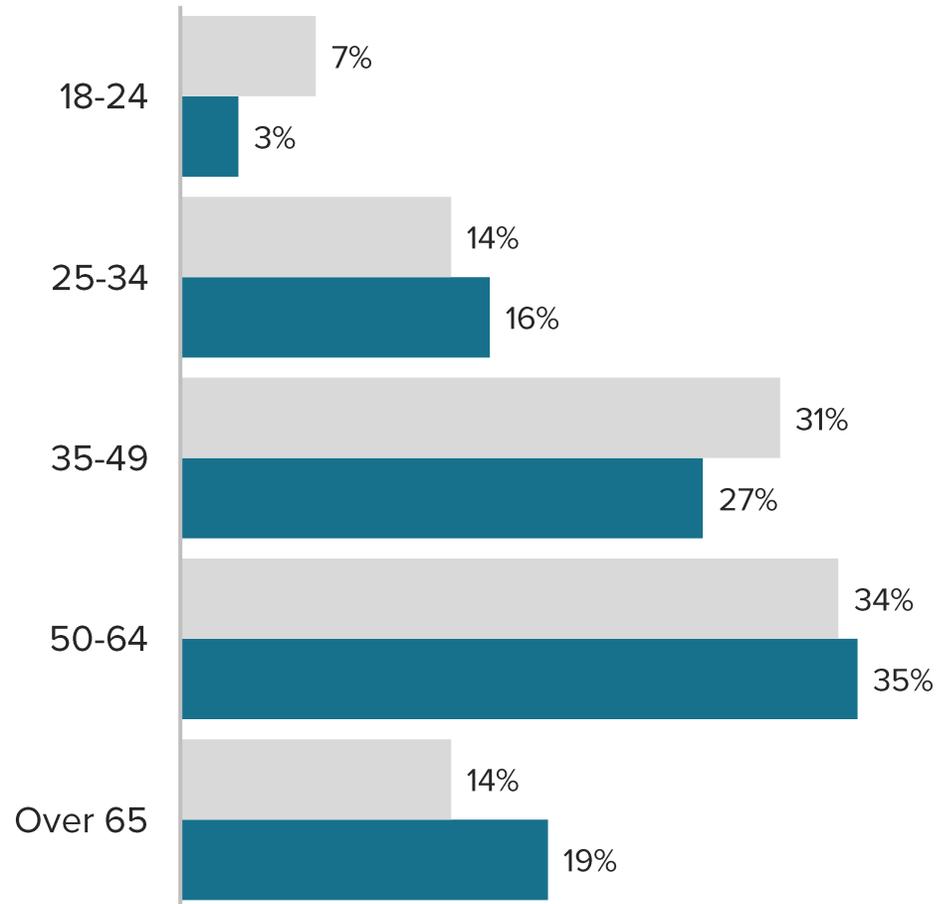
DETAILED FINDINGS | TRAVEL PARTY TYPE



DETAILED FINDINGS | PREVIOUS VISITS

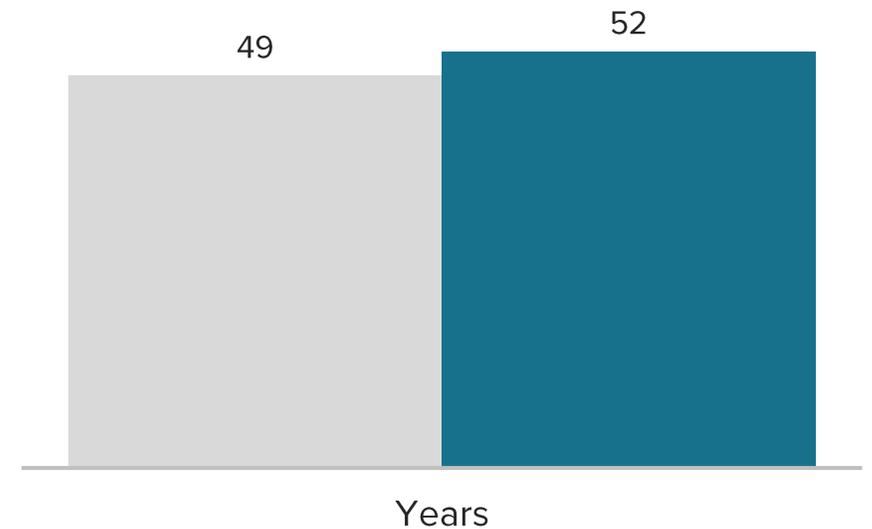


DETAILED FINDINGS | VISITOR AGES

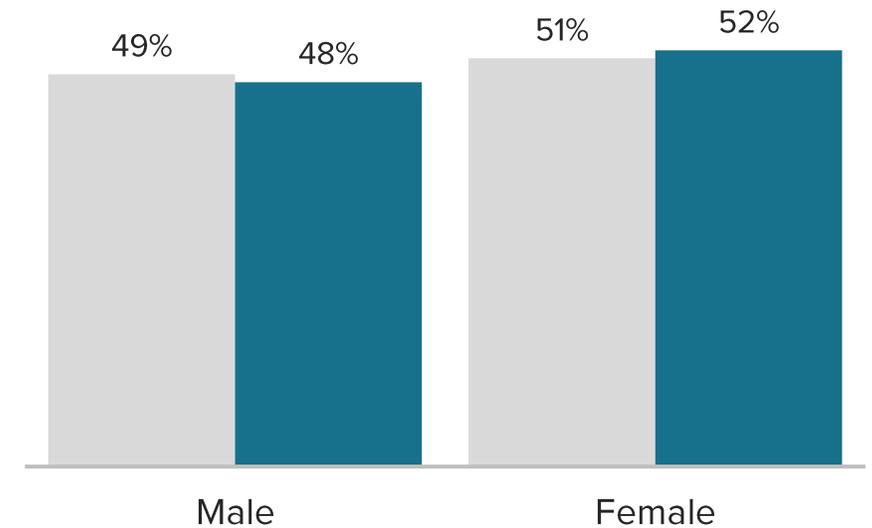
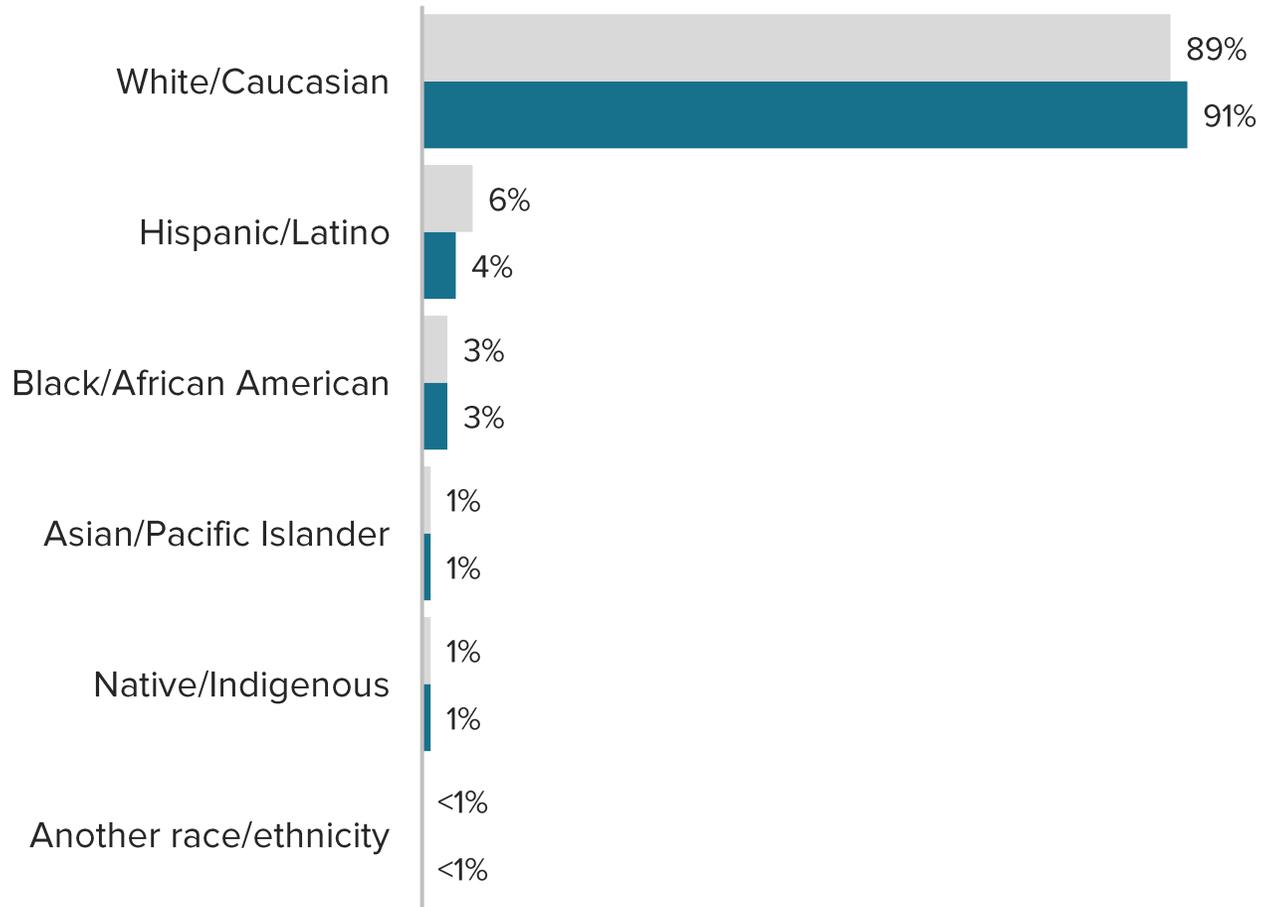


■ Apr-23 ■ Apr-24

Median Age

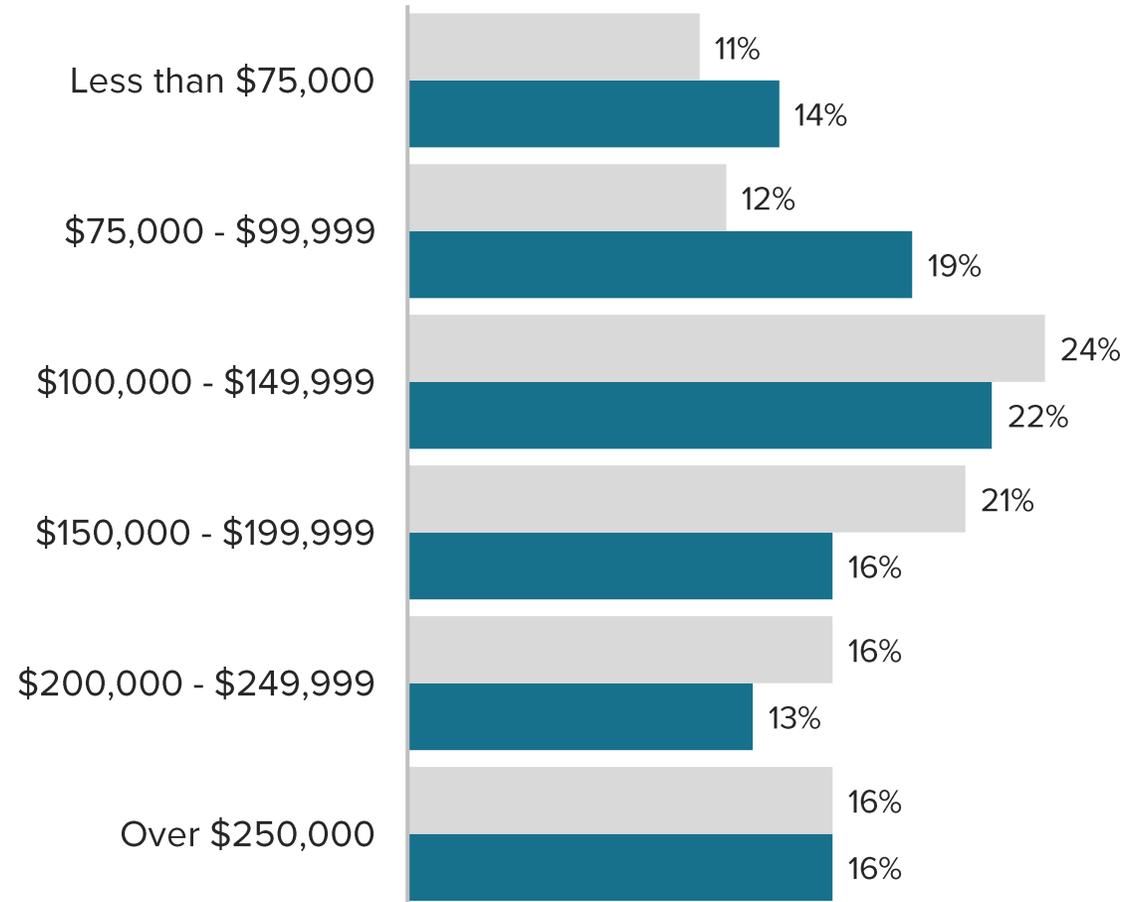


DETAILED FINDINGS | VISITOR RACE & GENDER¹



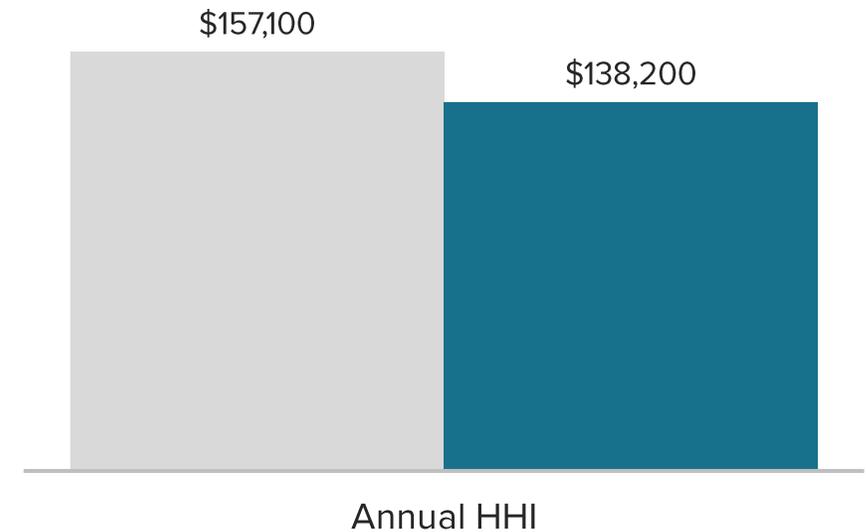
¹Of person interviewed. Females are generally more likely to agree to participate in survey research.

■ Apr-23
 ■ Apr-24



■ Apr-23 ■ Apr-24

Median Household Income



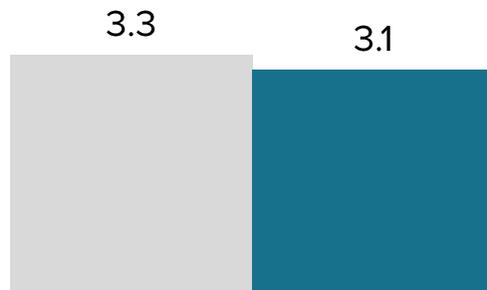


3c

DETAILED FINDINGS:
TRIP
EXPERIENCE

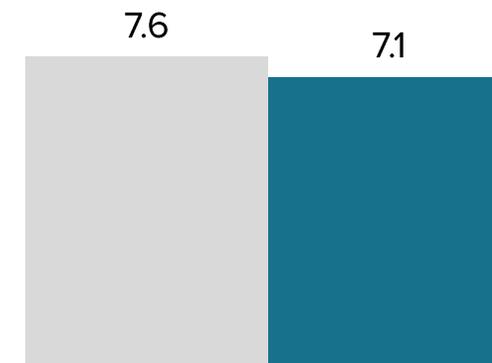
TRAVEL PARTY SIZE

3.1



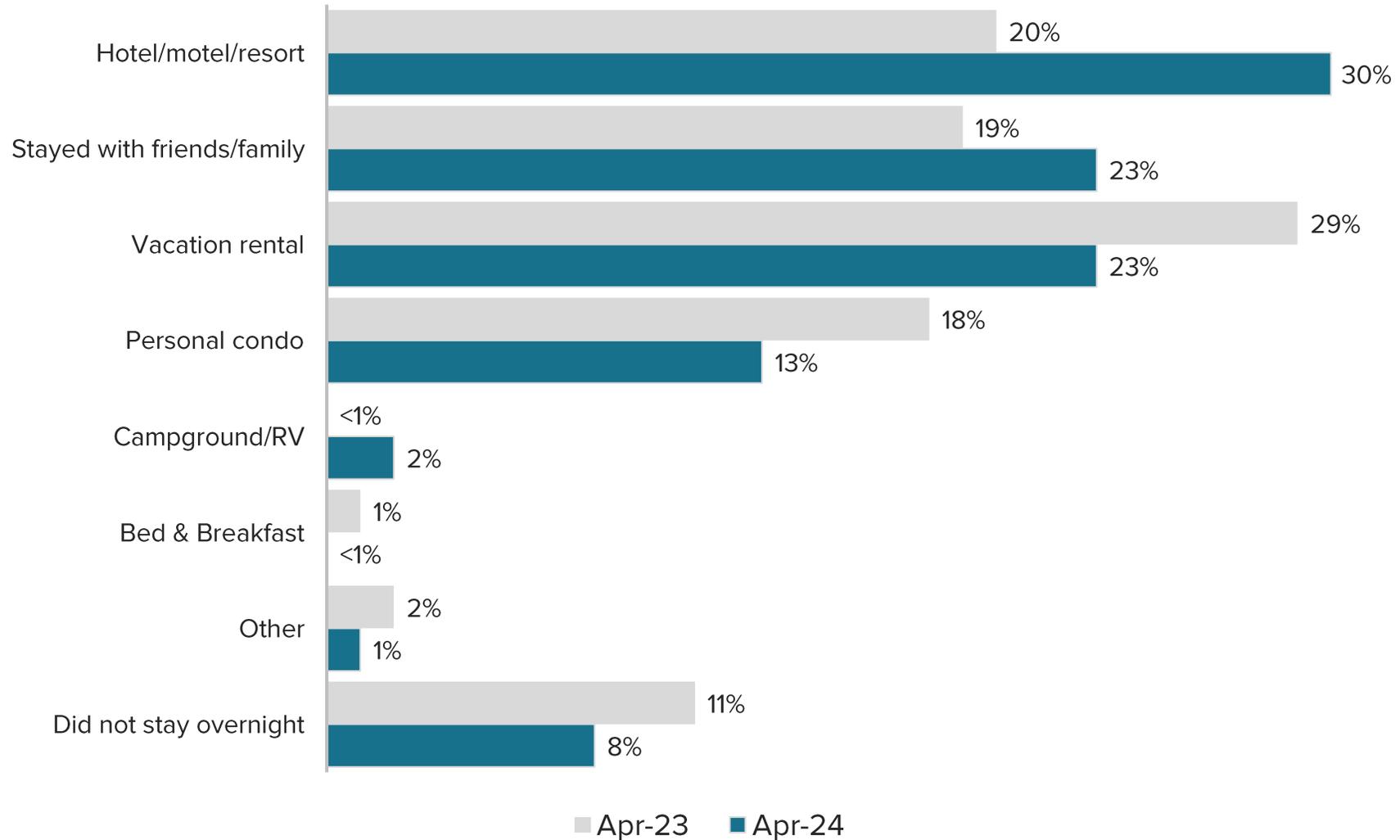
NIGHTS STAYED

7.1

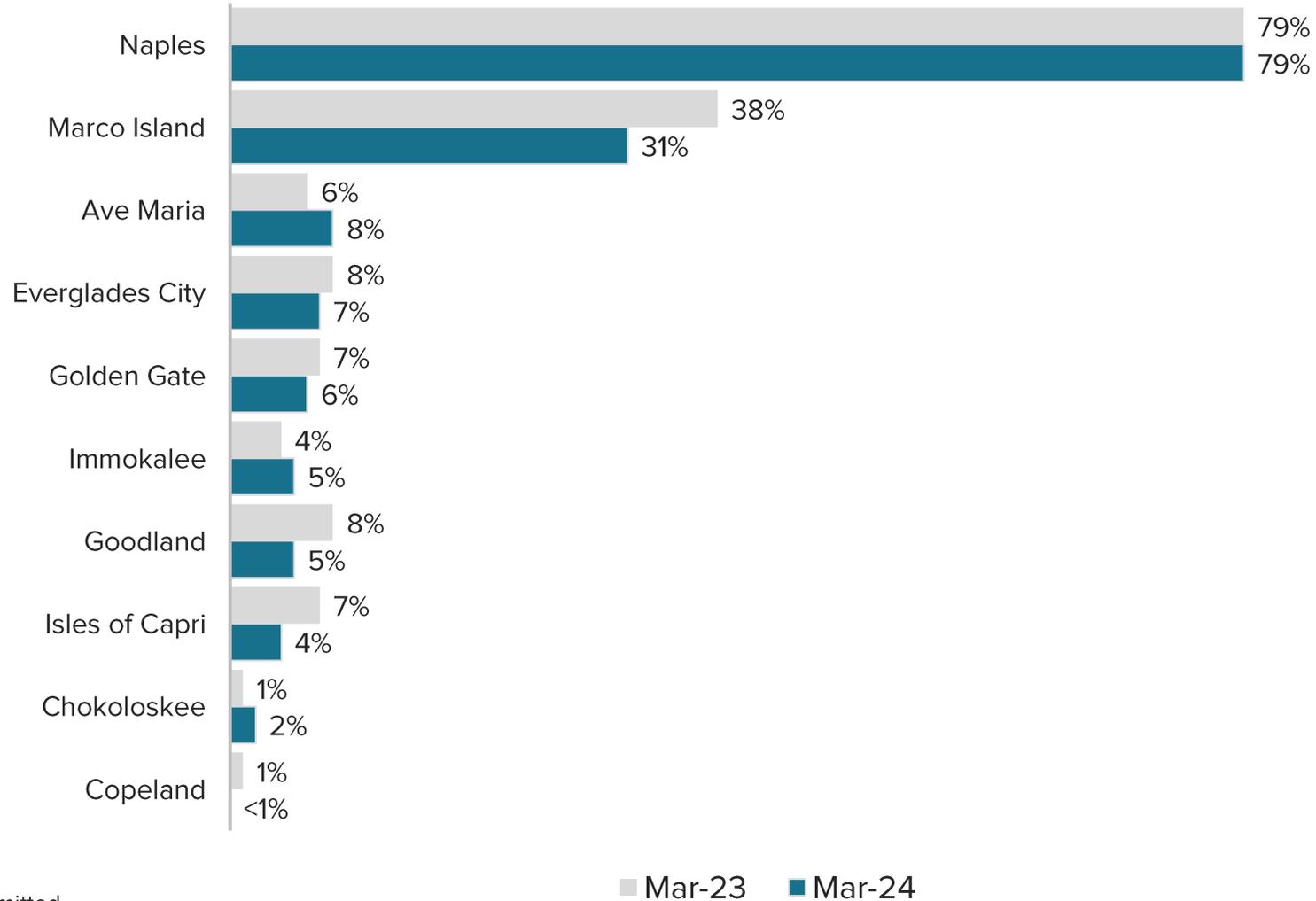


■ Apr-23 ■ Apr-24

DETAILED FINDINGS | TYPE OF ACCOMODATIONS



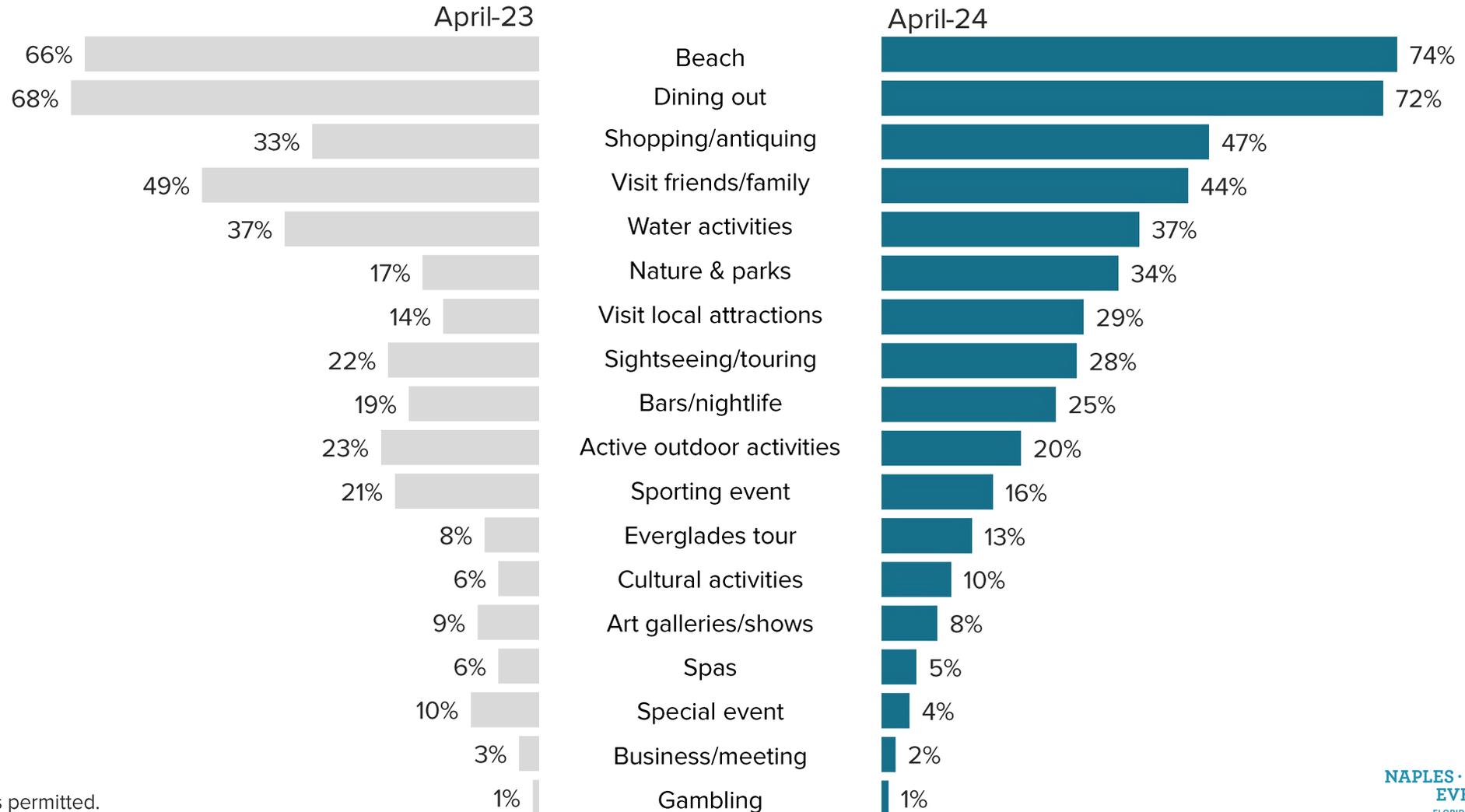
DETAILED FINDINGS | AREAS VISITED¹



¹Multiple responses permitted.

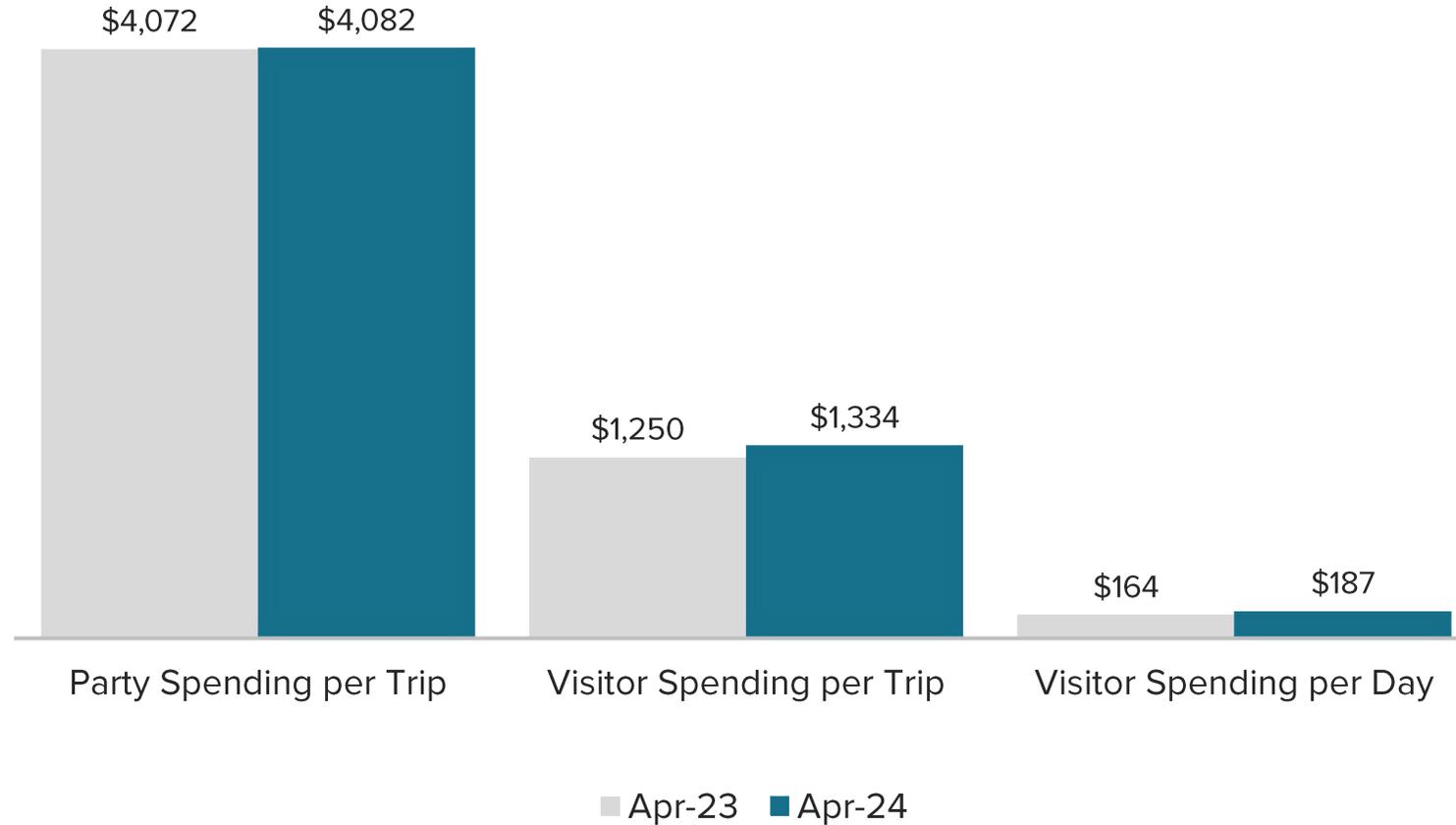
■ Mar-23 ■ Mar-24

DETAILED FINDINGS | TRIP ACTIVITIES¹



¹Multiple responses permitted.

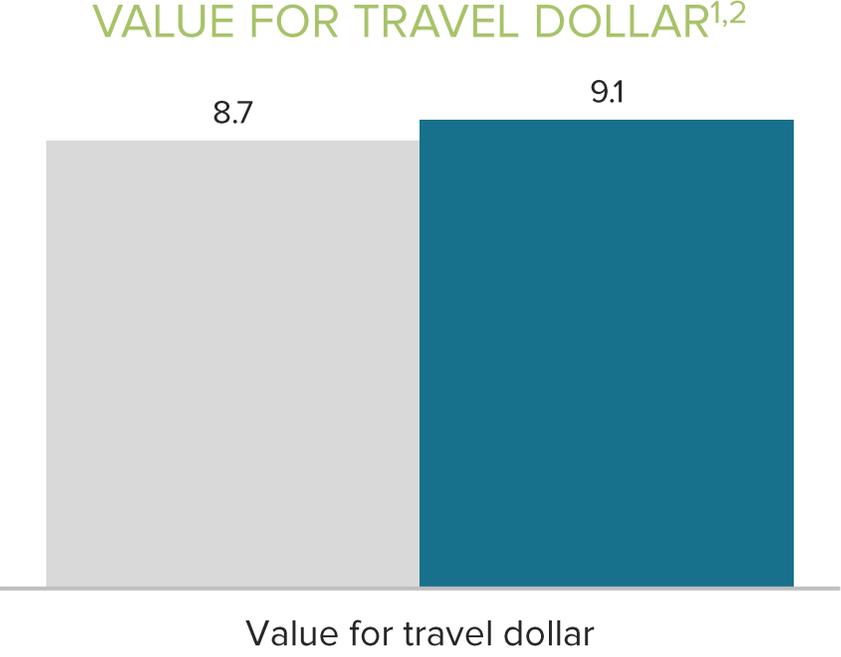
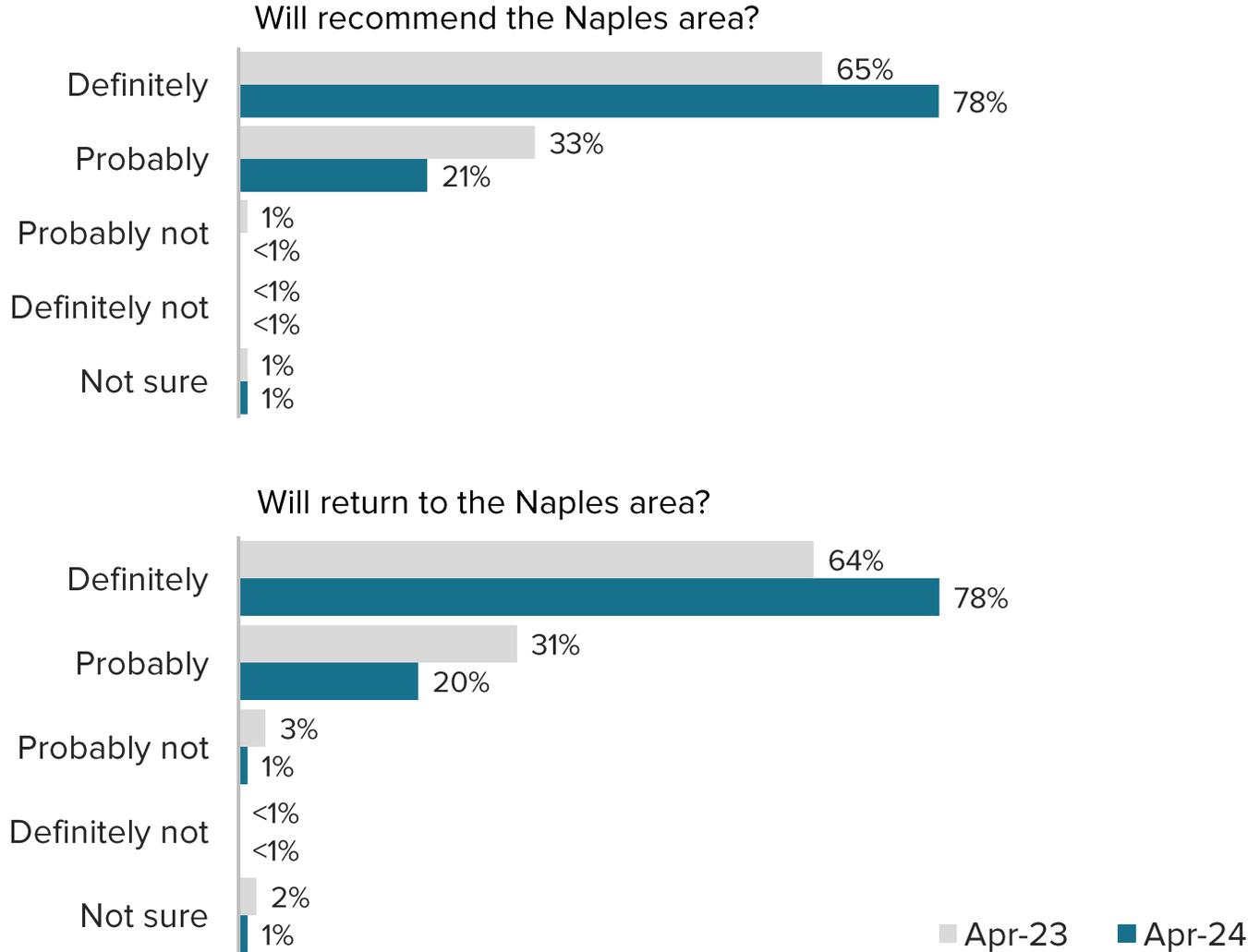
DETAILED FINDINGS | VISITOR SPENDING





3d

DETAILED FINDINGS:
POST-TRIP
EVALUATION



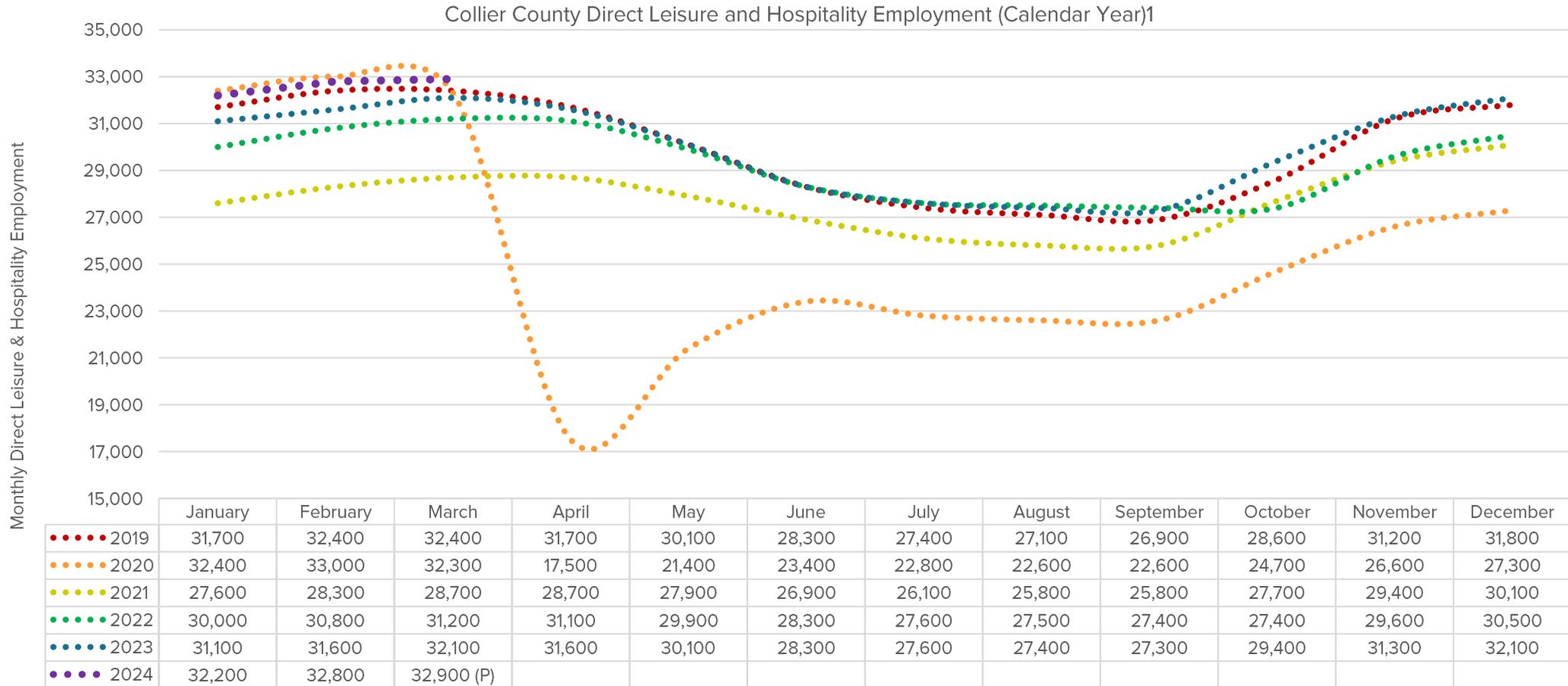
¹10-point scale where 10 is “excellent” and 1 is “poor”.
² All visitors who gave a rating of 6 or below cited high prices as their primary reason for giving lower ratings.



5

INDUSTRY
DATA

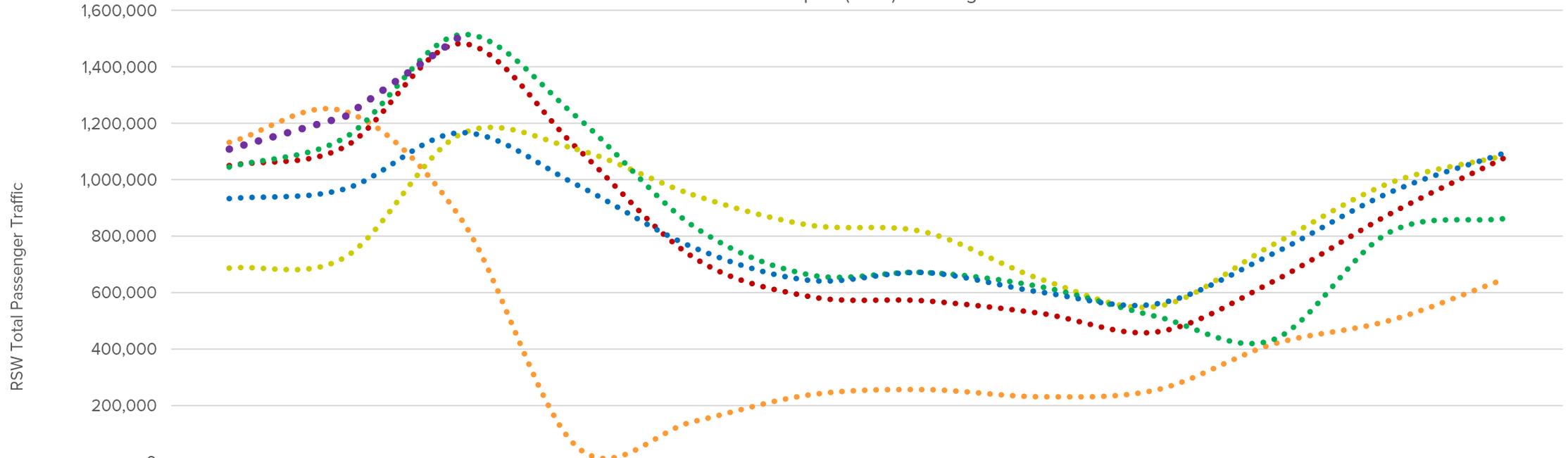
INDUSTRY DATA | CURRENT EMPLOYMENT



¹ SOURCE: Current Employment Statistic Program (CES), Collier County Leisure and Hospitality Sector, not seasonally adjusted.
(P) Preliminary.

INDUSTRY DATA | RSW PASSENGER TRAFFIC

Southwest Florida International Airport (RSW) Passenger Traffic¹



	January	February	March	April	May	June	July	August	September	October	November	December
●●●●● 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	839,377	814,471	647,534	551,041	769,524	986,908	1,085,569
●●●●● 2022	1,044,816	1,149,618	1,514,046	1,221,628	836,379	663,141	671,225	620,532	515,007	432,667	812,305	862,368
●●●●● 2023	932,896	967,416	1,166,442	981,216	760,330	643,486	670,818	601,542	560,358	737,527	953,025	1,094,783
●●●●● 2024	1,108,190	1,223,761	1,509,777									

¹SOURCE: Lee County Port Authority Monthly Statistics.

INDUSTRY DATA | LICENSED RENTAL UNITS

April 2024 Licensed Transient Rental Units				
	Hotel	Motel	Vacation Rental	Total
Naples	4,600	1,270	3,107	8,977
Marco Island	1,275	121	2,070	3,466
Immokalee	0	70	104	174
Golden Gate	0	150	0	150
Everglades City	38	36	21	95
Chokoloskee	0	13	2	15
Goodland	0	5	8	13
Ave Maria	0	0	5	5
Ochopee	0	0	1	1
Total	5,913	1,665	5,318	12,896²

¹SOURCE: Florida Department of Business & Professional Regulation.

Questions?

Contact Info:

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James Brendle, Project Director
james@dsg-research.com



A couple is seen from behind, standing on a stand-up paddleboard (SUP) on the ocean. They are silhouetted against a dramatic sunset sky filled with large, golden and orange clouds. The sun is low on the horizon, creating a bright glow. The water is dark with some white foam from a wave in the foreground.

THANK YOU