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EVERGLADES℠

FLORIDA'S PARADISE COAST

# August 2024 Monthly Visitor Dashboard

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# 1

## MONTHLY SNAPSHOT

# August 2024 | MONTHLY SNAPSHOT

- In August 2024, overall occupancy rate decreased 1.7% compared to August 2023, largely due to the increase in the number of room nights available (+2.7%) being larger than the increase in room night demand (+0.9%).

- Average Daily Rate (ADR) increased 2.0% year-over-year, which resulted in a revenue per available room (RevPAR) of $105.42, essentially the same as the $105.17 last year.

- Direct spending by visitors and total economic impact of tourism in August increased by 1.3% and 1.2%, respectively. The total economic impact of tourism is currently up 10.9% so far fiscal-year-to-date, with one month remaining in the 2023-24 fiscal year.

- In terms of visitor attributes, August 2024 saw year-over-year increases in the number of visitors travelling as a couple, the number of visitors coming to the area to visit with friends and family, the number of visitors who have visited 2-5 times prior, and the number of visitors staying in hotels, motels, or resorts.

- In August 2024, compared to August 2023, there were 8% points more visitors to the area whose households make $100k-$150k per year, and the region of origin that saw the largest year-over-year increase in visitation was the Midwest, increasing from 45k visitors to 54k visitors.

# 2a

## EXECUTIVE MONTHLY SUMMARY

# AUGUST 2024 | VISITATION & ROOM NIGHTS

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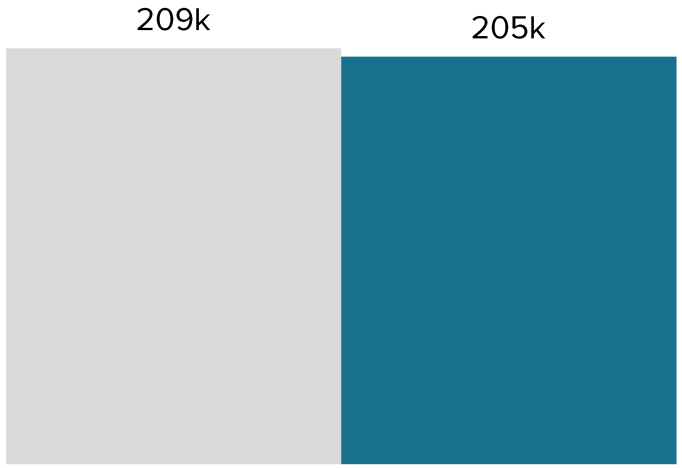
## VISITORS

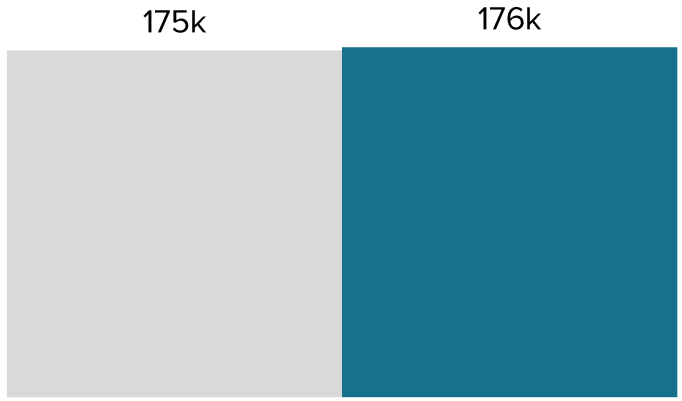
205,200




**- 2.0%** from 2023

## ROOM NIGHTS

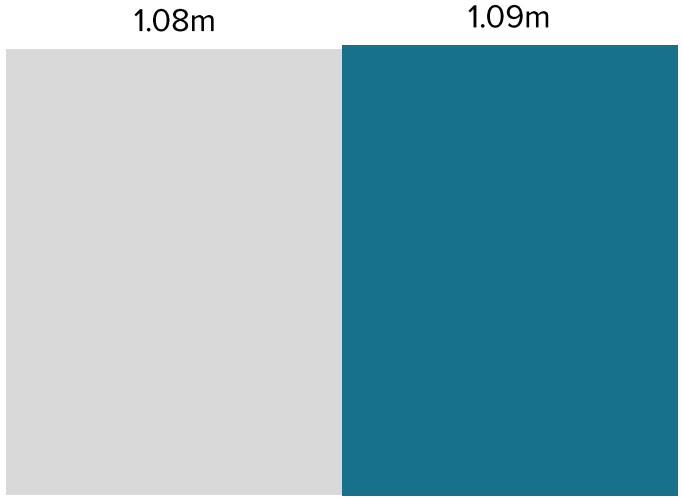
176,200




**+ 0.9%** from 2023

## VISITOR DAYS

1,087,600




**+ 1.0%** from 2023

Aug-23 Aug-24

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# AUGUST 2024 | SPENDING & ECONOMIC IMPACT[1]

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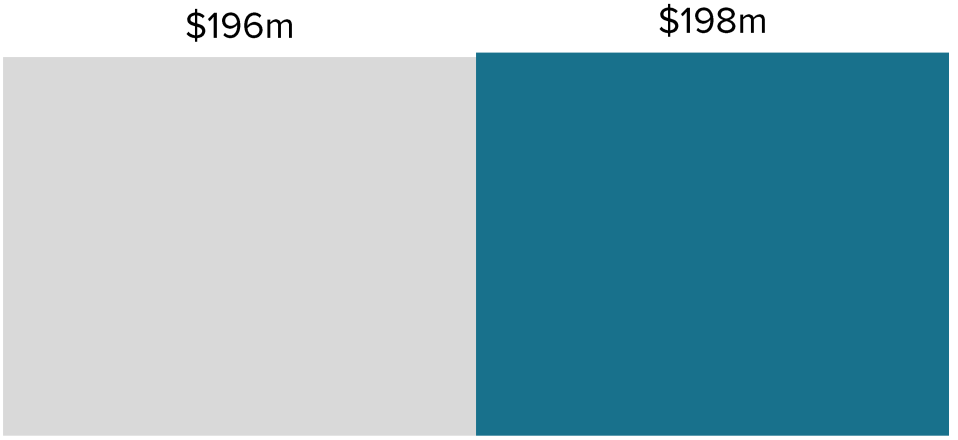
## DIRECT SPENDING

# $142,899,100

+ **1.3%** from 2023

## ECONOMIC IMPACT

# $198,058,200




+ **1.2%** from 2023

Aug-23 Aug-24

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

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# AUGUST 2024 | OVERALL LODGING METRICS[1,2]

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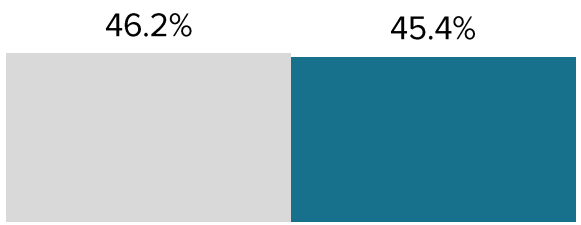
## OCCUPANCY RATE

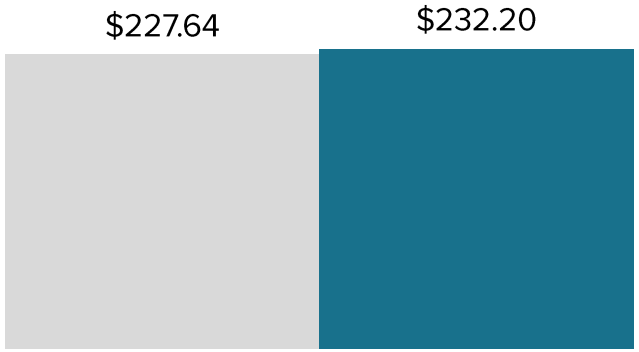
45.4%




**- 1.7%** from 2023

## AVERAGE DAILY RATE

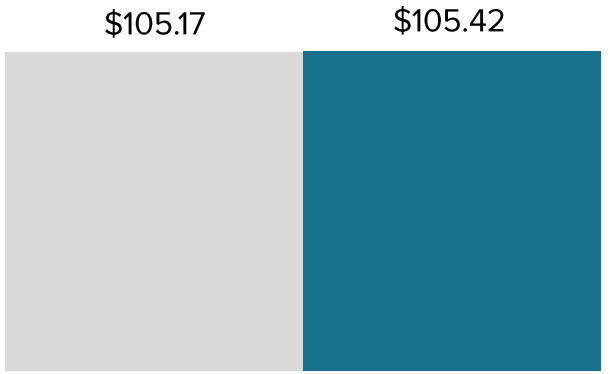
$232.20




**+ 2.0%** from 2023

## REVENUE PER AVAILABLE ROOM

$105.42




**+ 0.2%** from 2023

Aug-23 Aug-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.

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# AUGUST 2024 | HOTEL LODGING METRICS[1,2]

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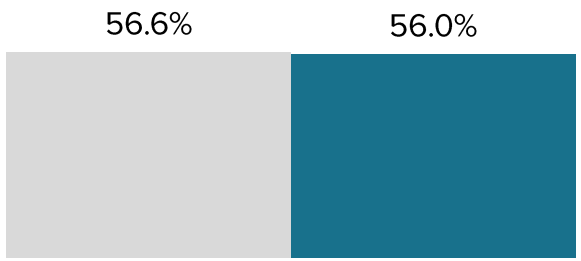
## OCCUPANCY RATE[3]

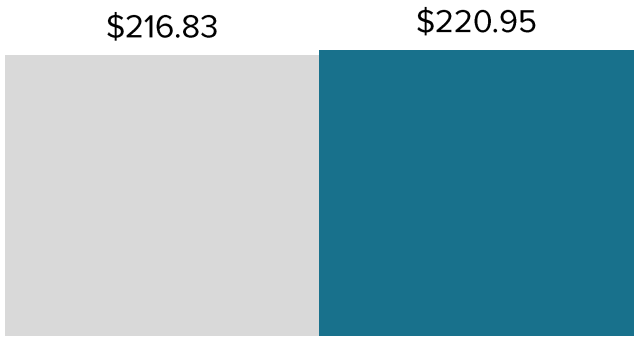
56.0%




**- 1.0%** from 2023

## AVERAGE DAILY RATE

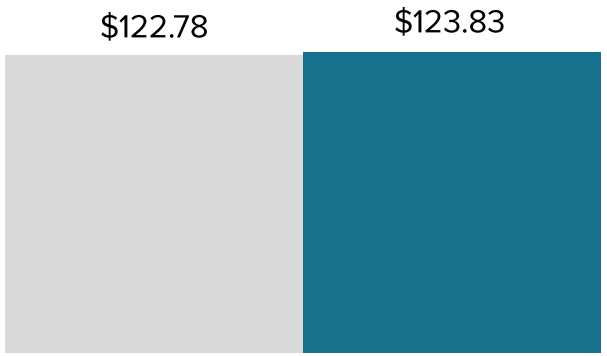
$220.95




**+ 1.9%** from 2023

## REVENUE PER AVAILABLE ROOM

$123.83




**+ 0.9%** from 2023

Aug-23 Aug-24

[1]Source: STR data
[2] Lodging metrics on this slide are only reflective of the hotels within Collier County.
[3] Although Occupancy Rate is down year-over-year, this is largely due to the increased number of available units in 2024.

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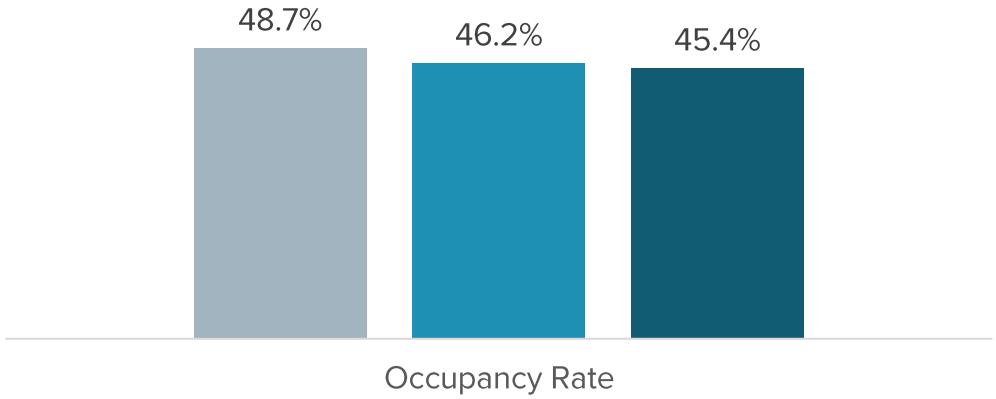
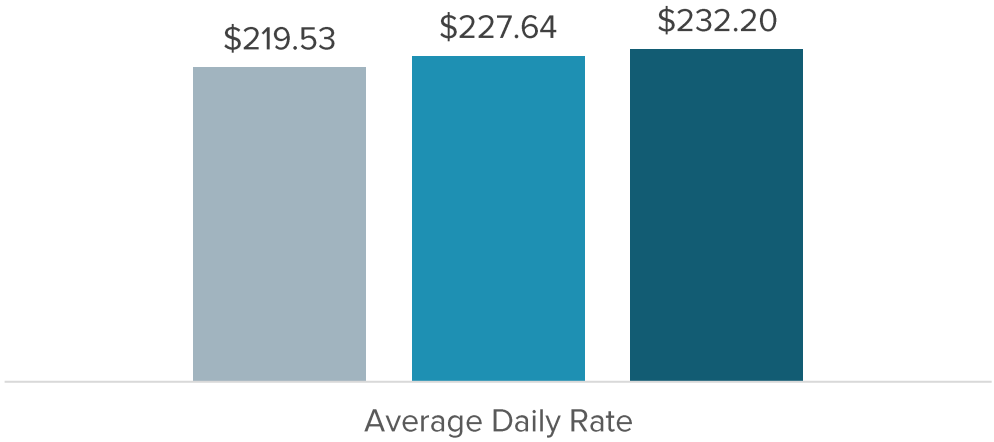
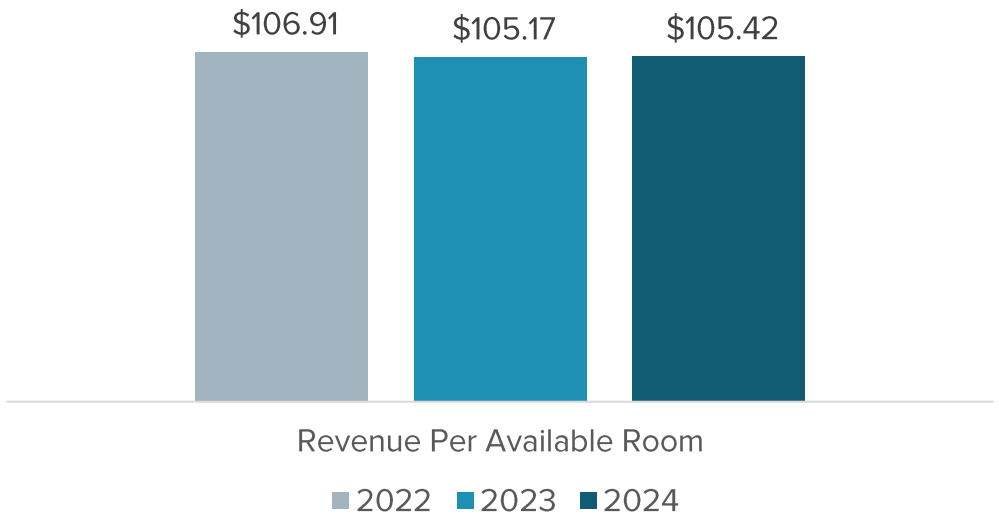
# AUGUST | OVERALL LODGING METRICS TREND[1]




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

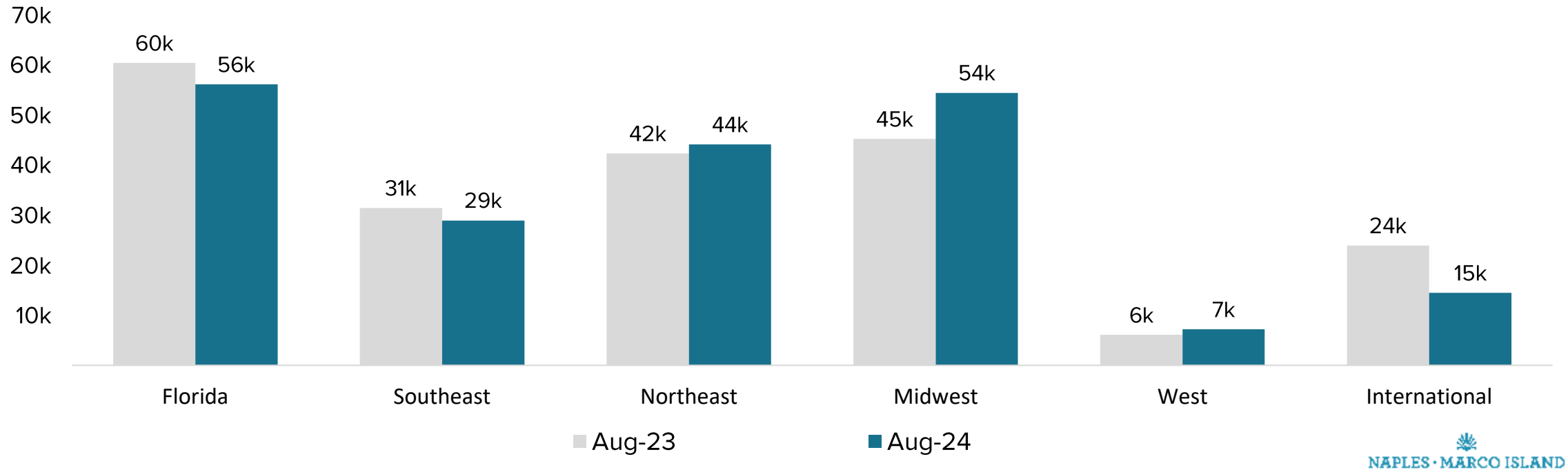
# AUGUST 2024 | VISITOR ORIGIN

## FLORIDA VISITORS

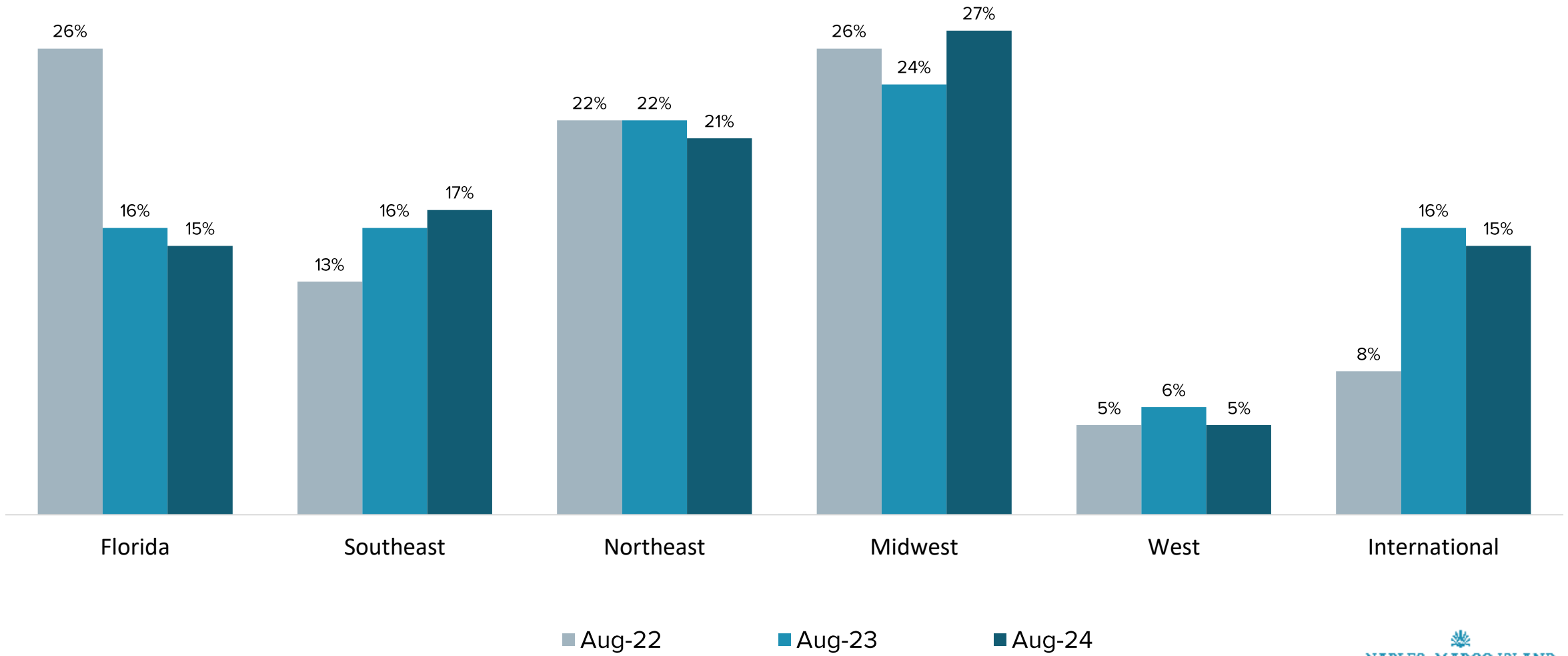
56,100

## OUT-OF-STATE VISITORS

149,100



# AUGUST | OVERNIGHT VISITOR ORIGIN TREND



# 2b

## EXECUTIVE FISCAL YEAR-TO-DATE (FYTD) SUMMARY

# FYTD | VISITATION METRICS

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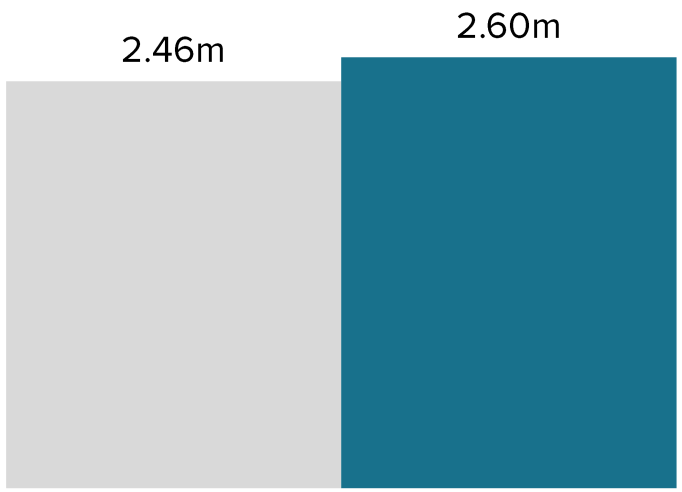
## FYTD VISITORS

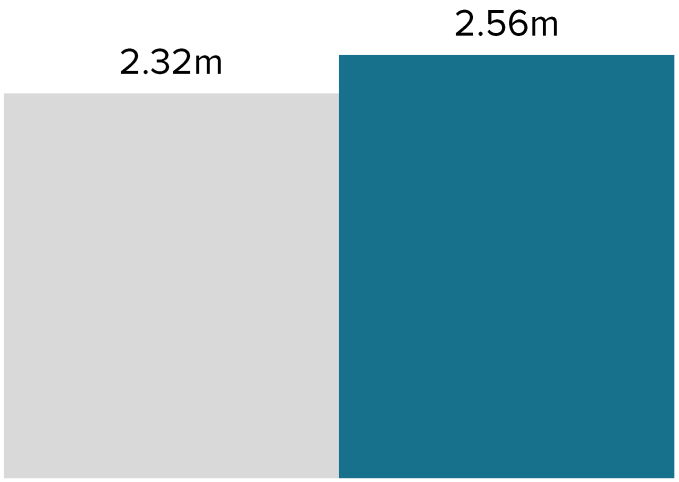
**2,602,800**




+ **5.9%** from FY23

## FYTD ROOM NIGHTS

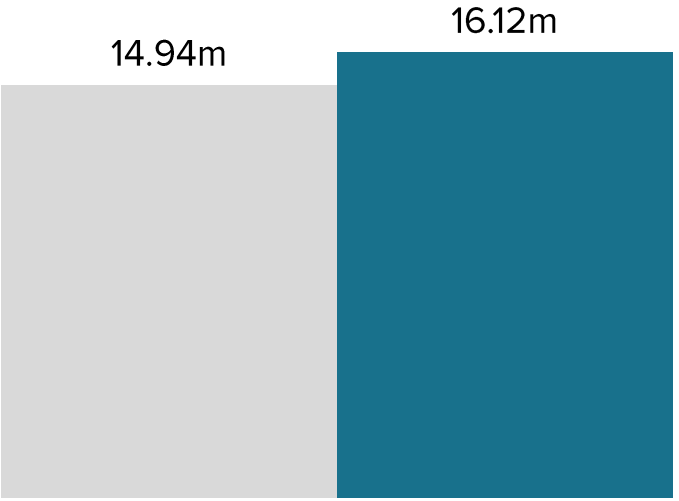
**2,556,000**




+ **10.0%** from FY23

## FYTD VISITOR DAYS

**16,121,700**




+ **7.9%** from FY23

FY23 FY24

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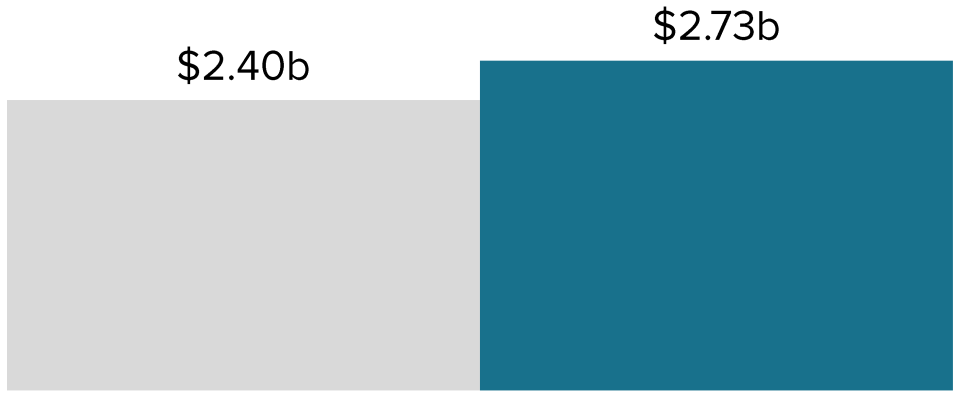
# FYTD | SPENDING & ECONOMIC IMPACT

## FYTD DIRECT SPENDING

**$2,729,980,100**

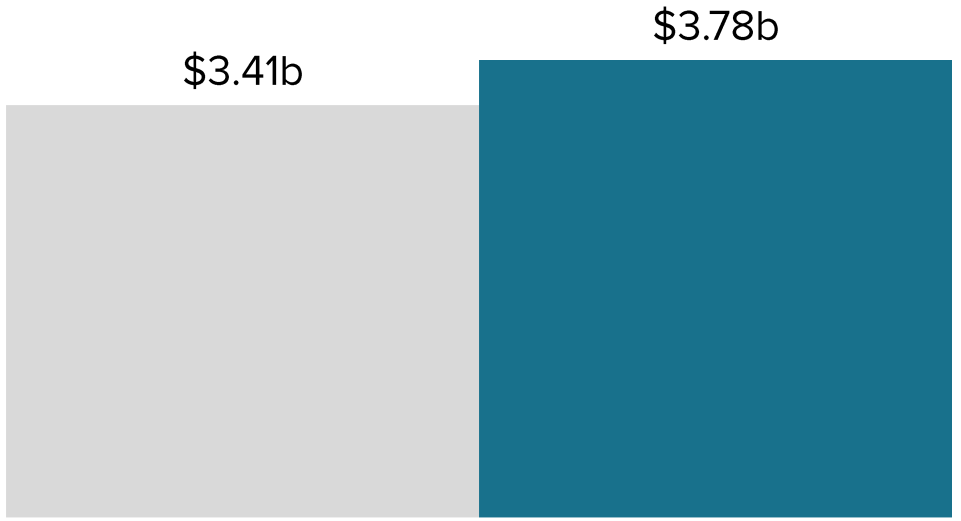
**+ 13.6%** from FY23




## FYTD ECONOMIC IMPACT

**$3,784,945,100**

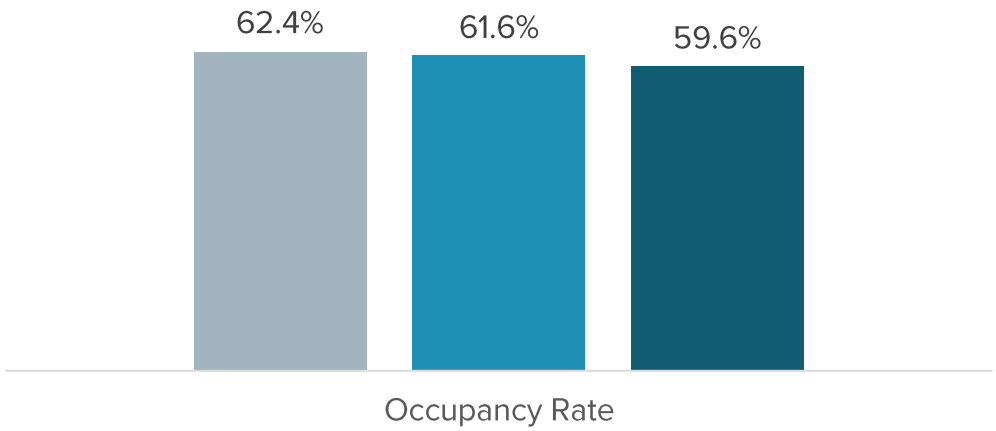
**+ 10.9%** from FY23[1]

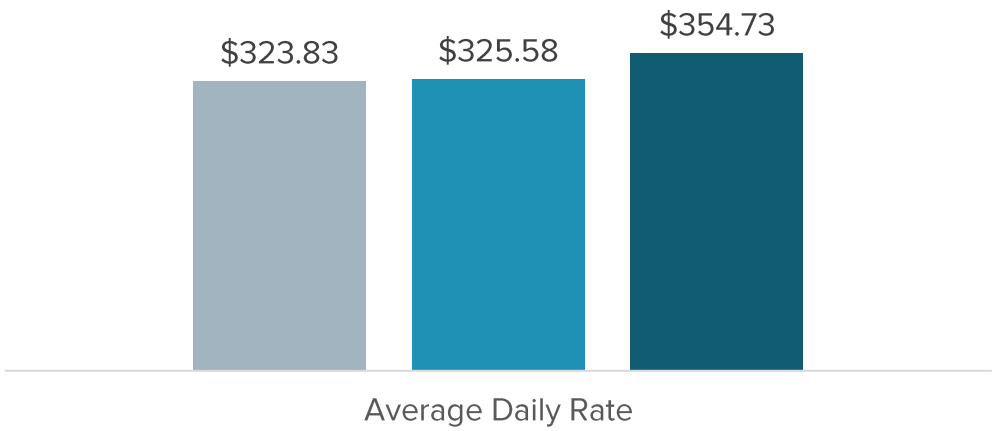


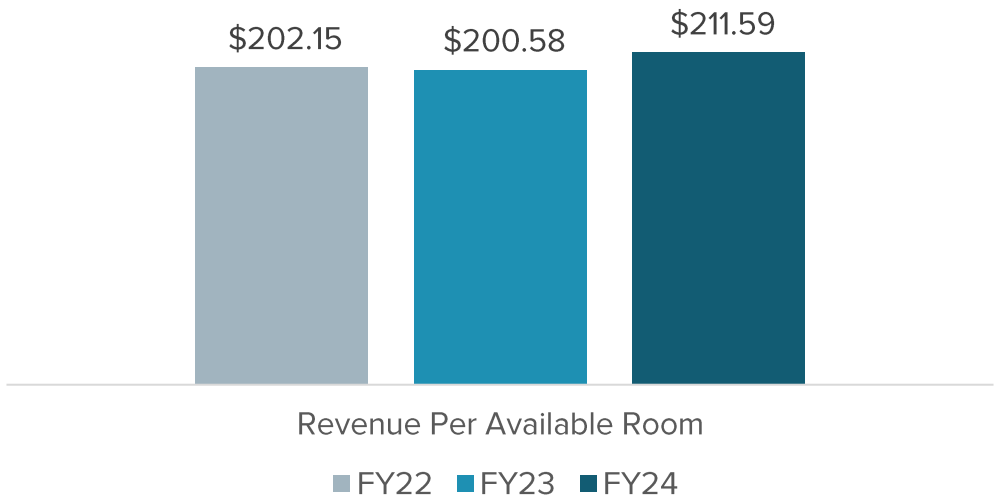

FY23 FY24

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

# FYTD | 2022-2024 OVERALL LODGING METRICS[1]

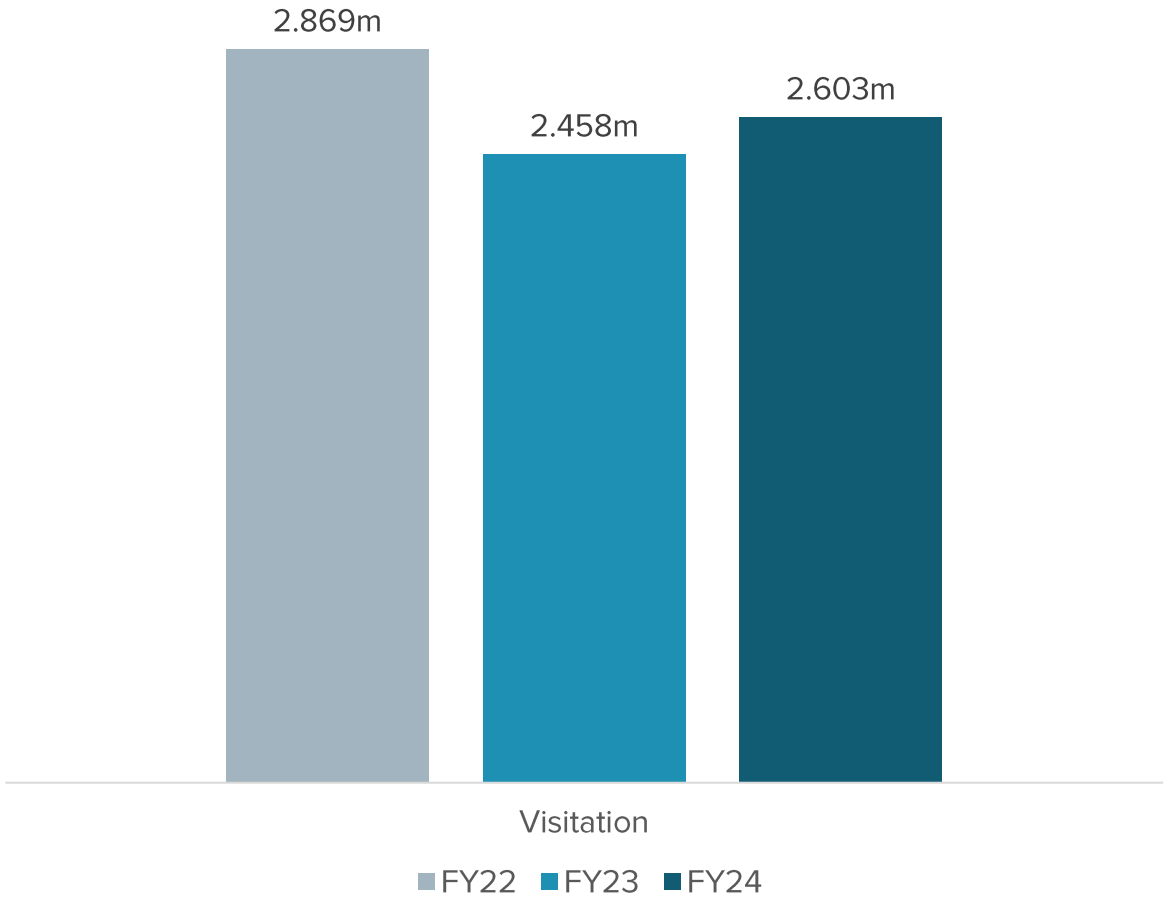


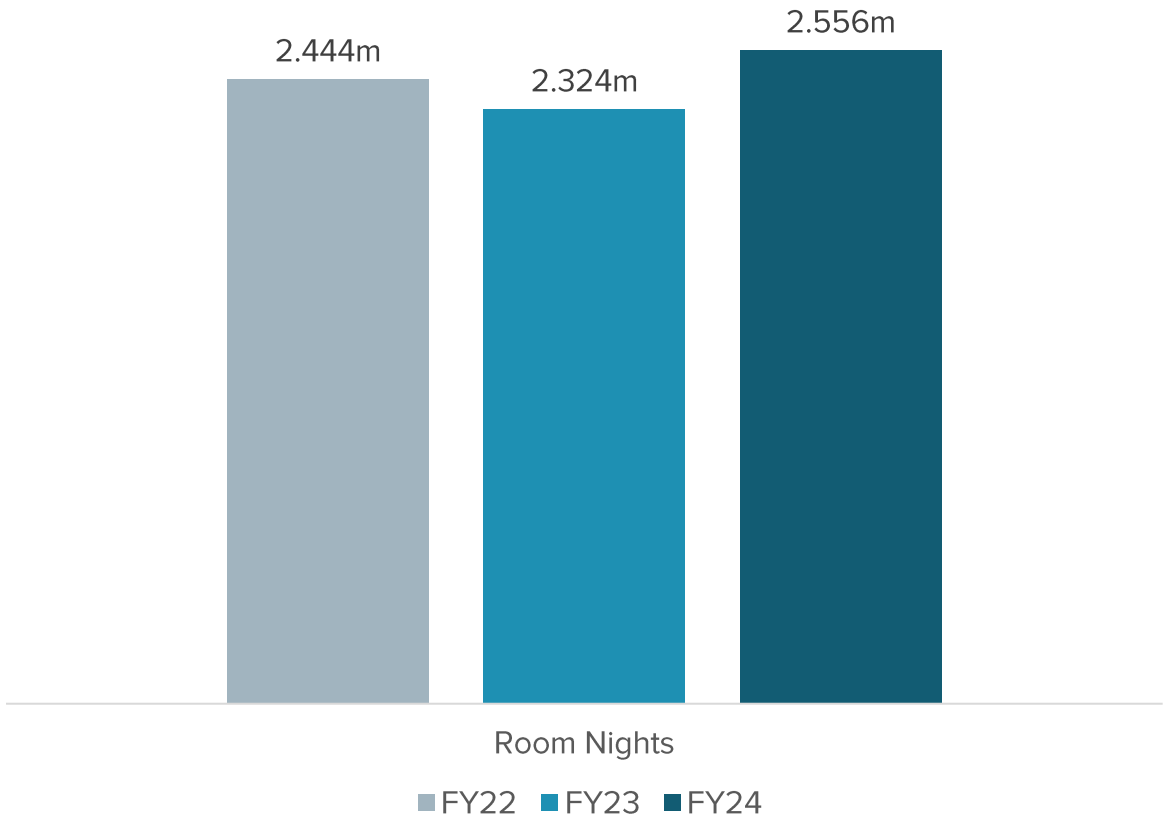




[1]Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

# FYTD | 2022-2024 VISITATION & ROOM NIGHTS[1]




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

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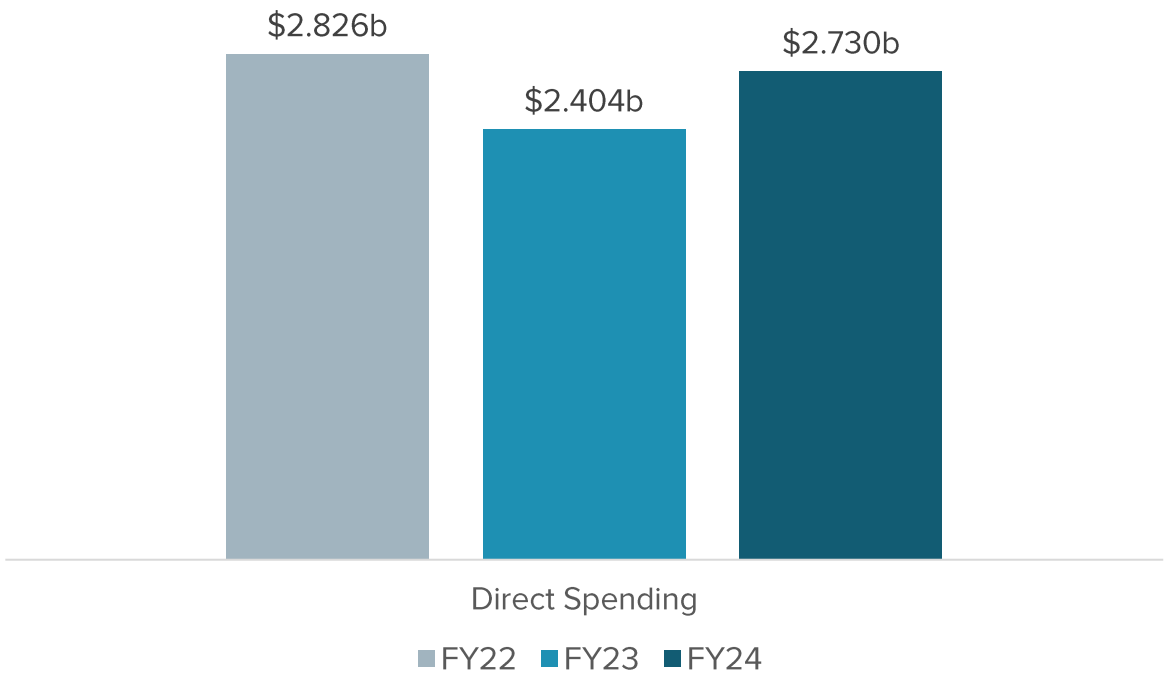
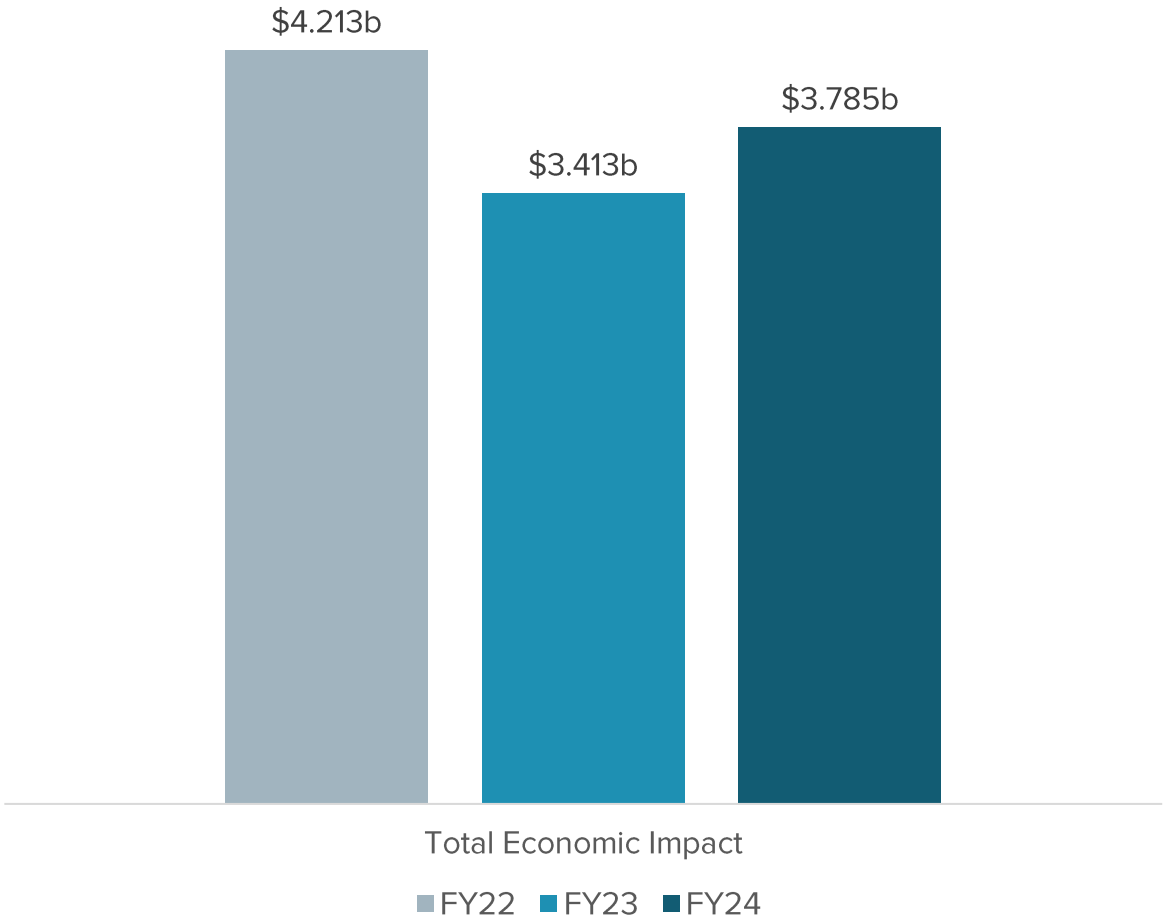
# FYTD | 2022-2024 SPENDING & ECONOMIC IMPACT[1]




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

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# FYTD | VISITOR ORIGIN

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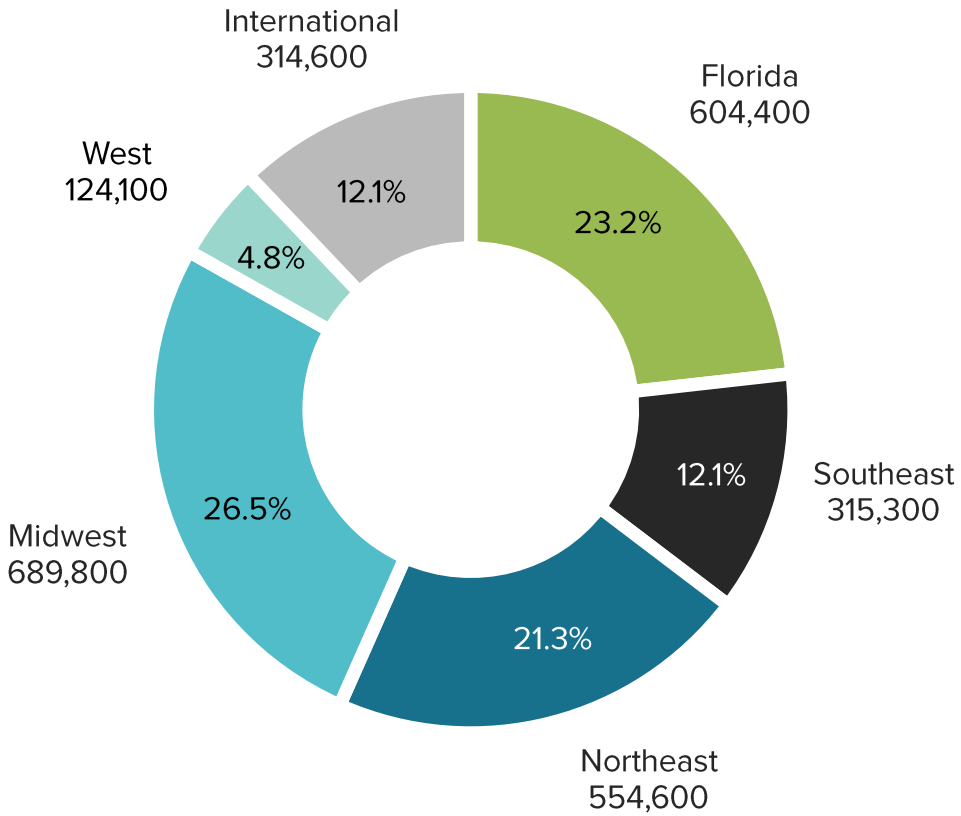
| | FYTD 2023 | | FYTD 2024 | | Percent Change (±Δ%) | |
|---|---|---|---|---|---|---|
| Region | # Visitors | % Share | # Visitors | % Share | # Visitors | % Share |
| Florida | 667,500 | 27.2% | 604,400 | 23.2% | -9.5% | -14.5% |
| Southeast | 260,700 | 10.6% | 315,300 | 12.1% | 20.9% | 14.2% |
| Northeast | 488,700 | 19.9% | 554,600 | 21.3% | 13.5% | 7.2% |
| Midwest | 662,200 | 26.9% | 689,800 | 26.5% | 4.2% | -1.6% |
| West | 118,600 | 4.8% | 124,100 | 4.8% | 4.6% | -1.2% |
| Canada | 104,400 | 4.2% | 113,100 | 4.4% | 8.3% | 2.3% |
| Europe | 95,300 | 3.9% | 138,800 | 5.3% | 45.6% | 37.5% |
| C/S America | 33,200 | 1.4% | 35,600 | 1.4% | 7.2% | 1.3% |
| Other | 27,100 | 1.1% | 27,100 | 1.0% | 0.0% | -5.6% |
| Total | 2,457,700 | 100.0% | 2,602,800 | 100.0% | | |

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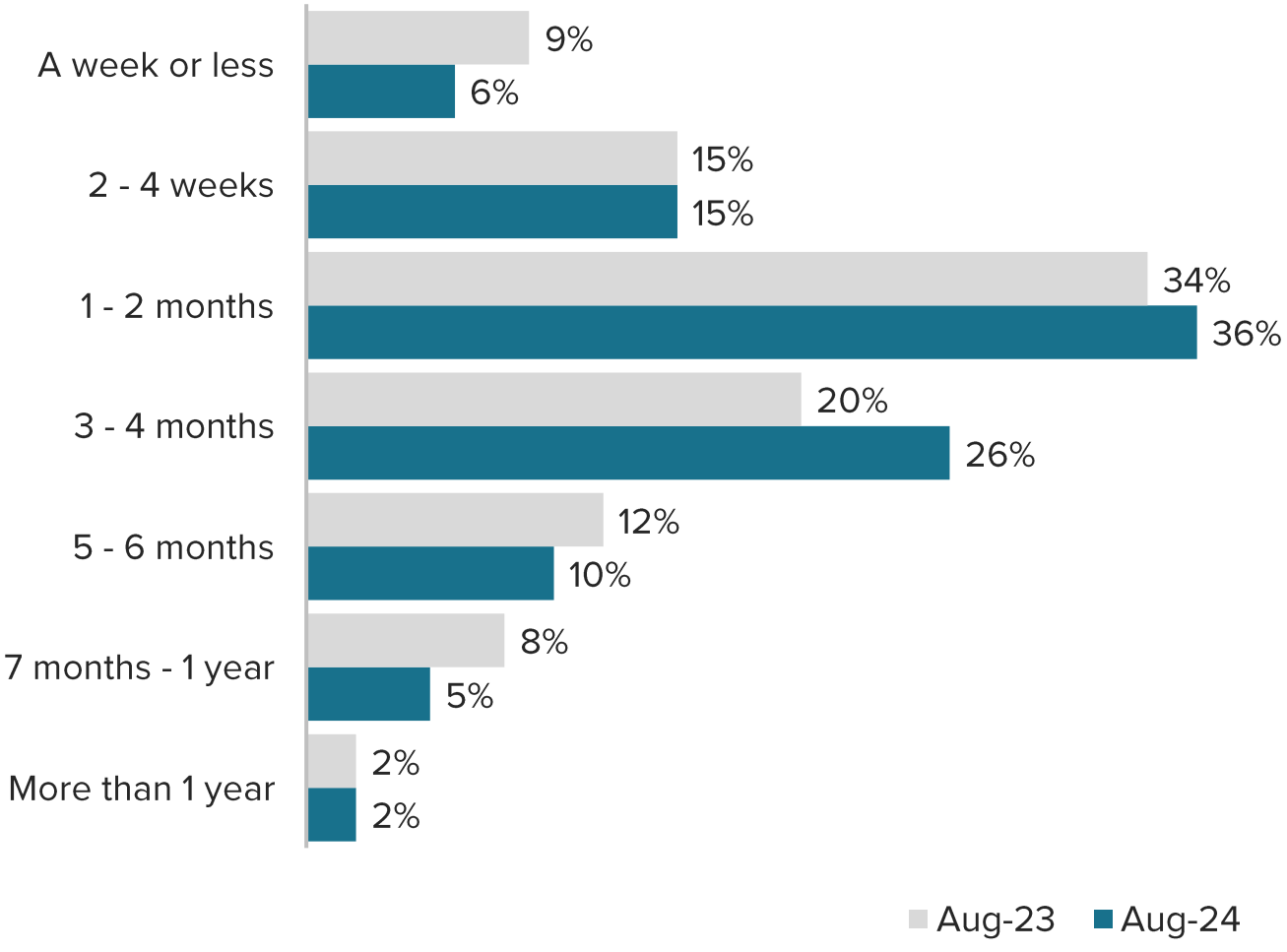
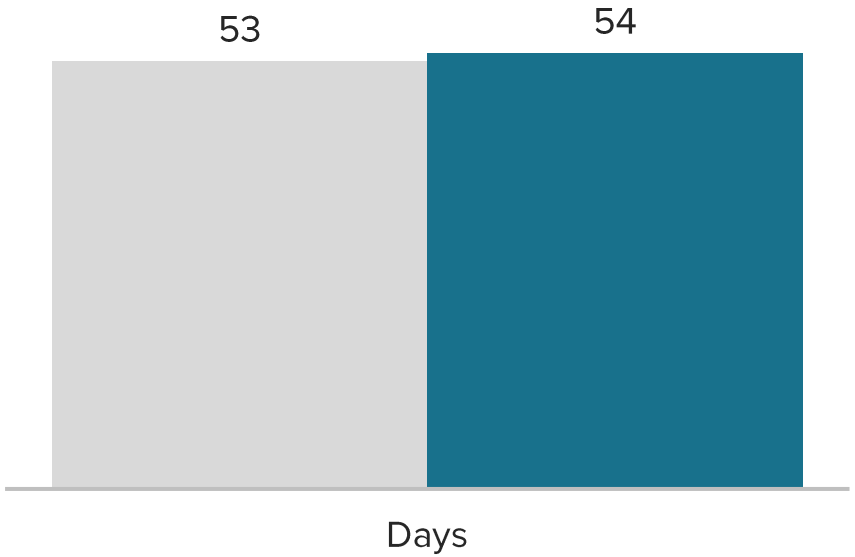
# 3a

## DETAILED FINDINGS: PRE-VISIT

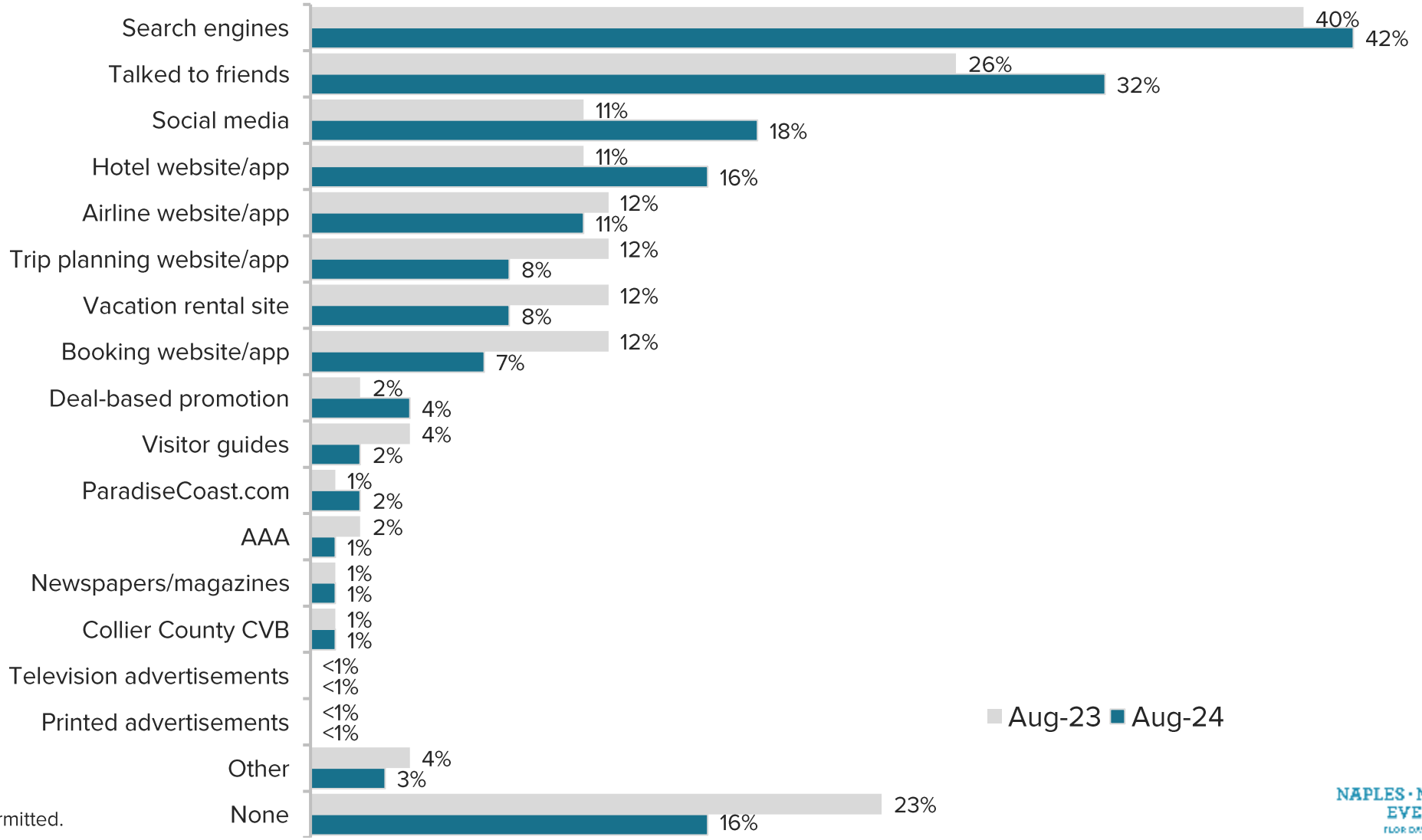
# DETAILED FINDINGS | TRIP PLANNING CYCLE




## Median Trip Planning Time

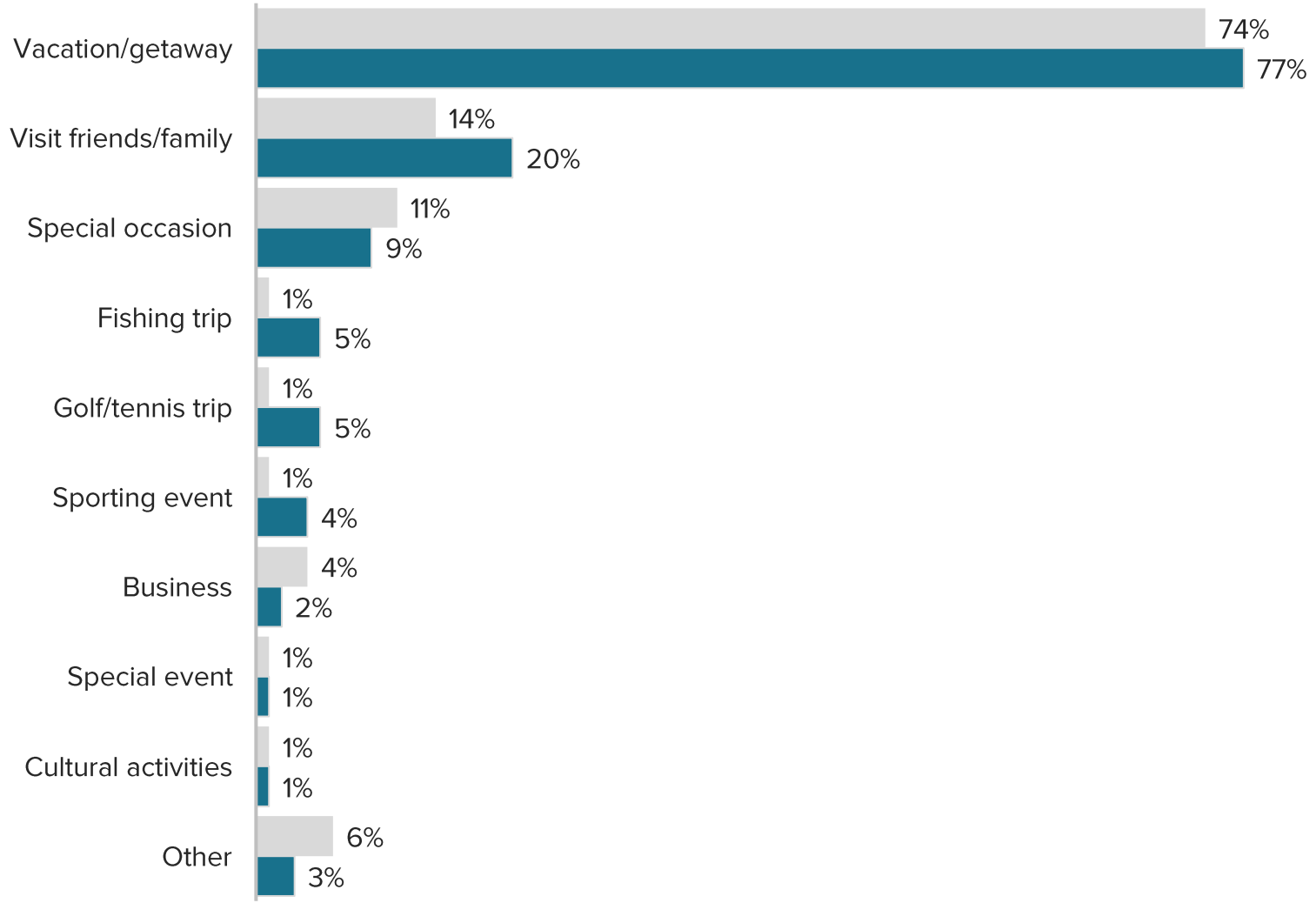


# DETAILED FINDINGS | TRIP PLANNING SOURCES[1]



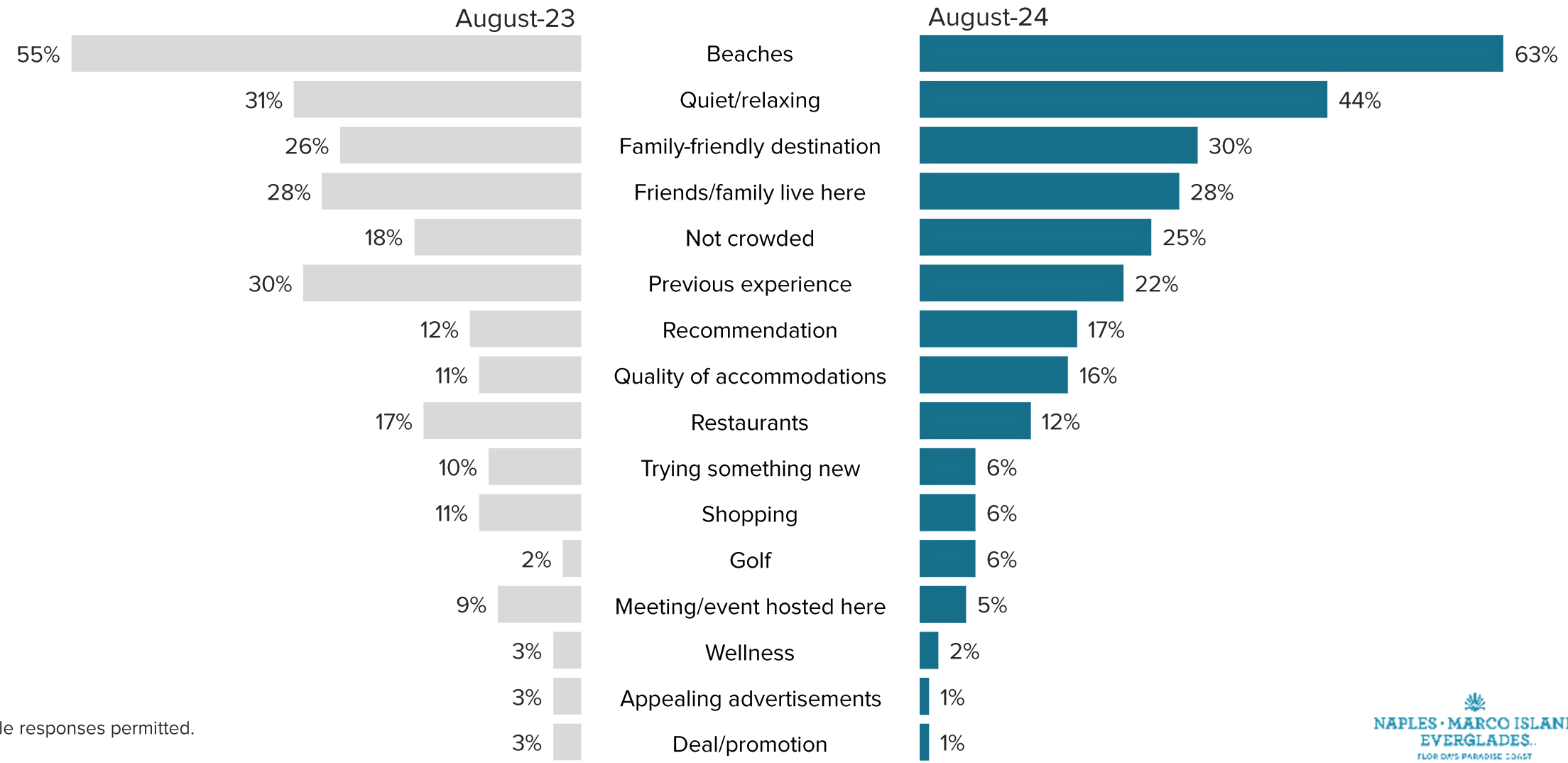

[1] Multiple responses permitted.

# DETAILED FINDINGS | REASONS FOR VISITING[1]



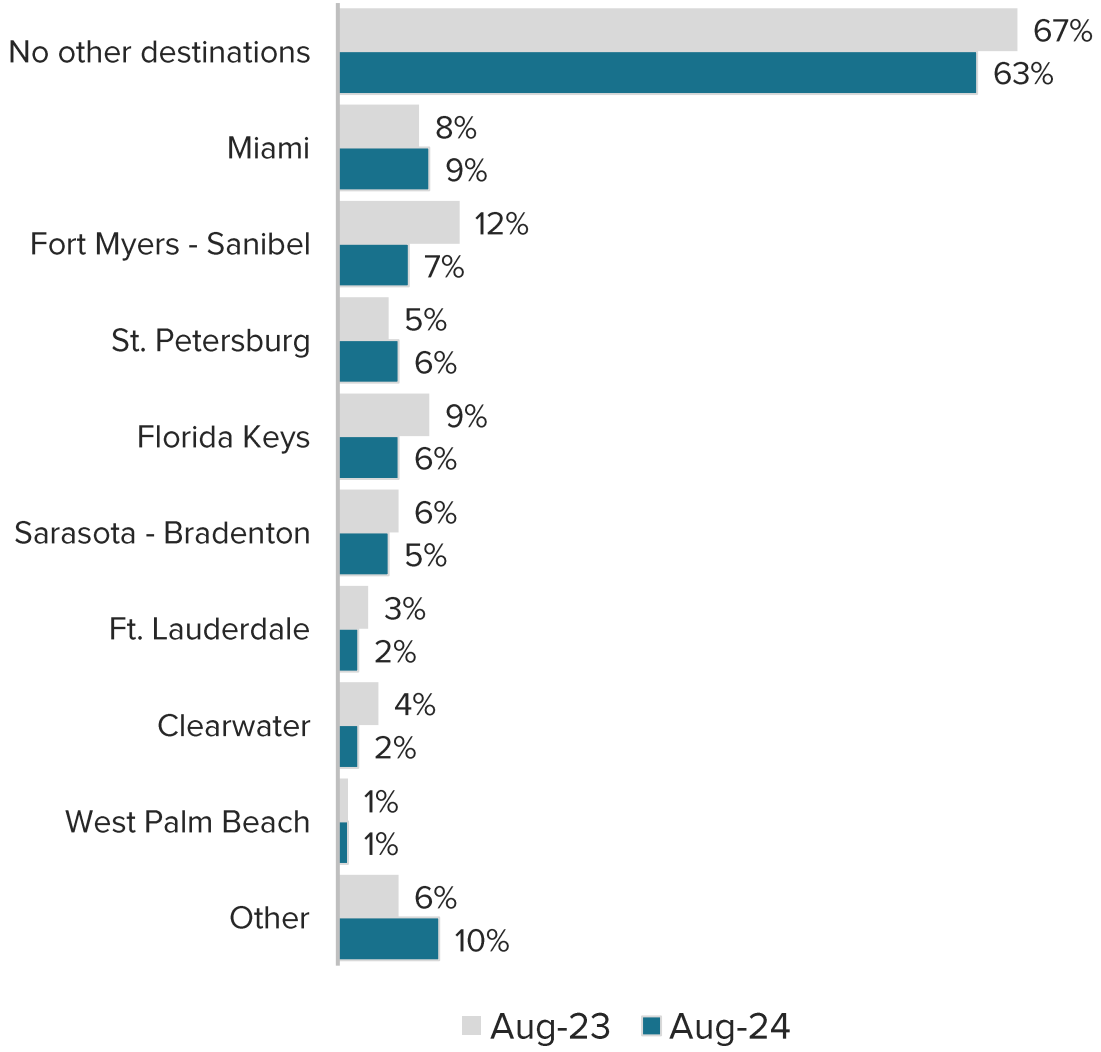

[1] Multiple responses permitted.

# DETAILED FINDINGS | REASONS FOR CHOOSING[1]



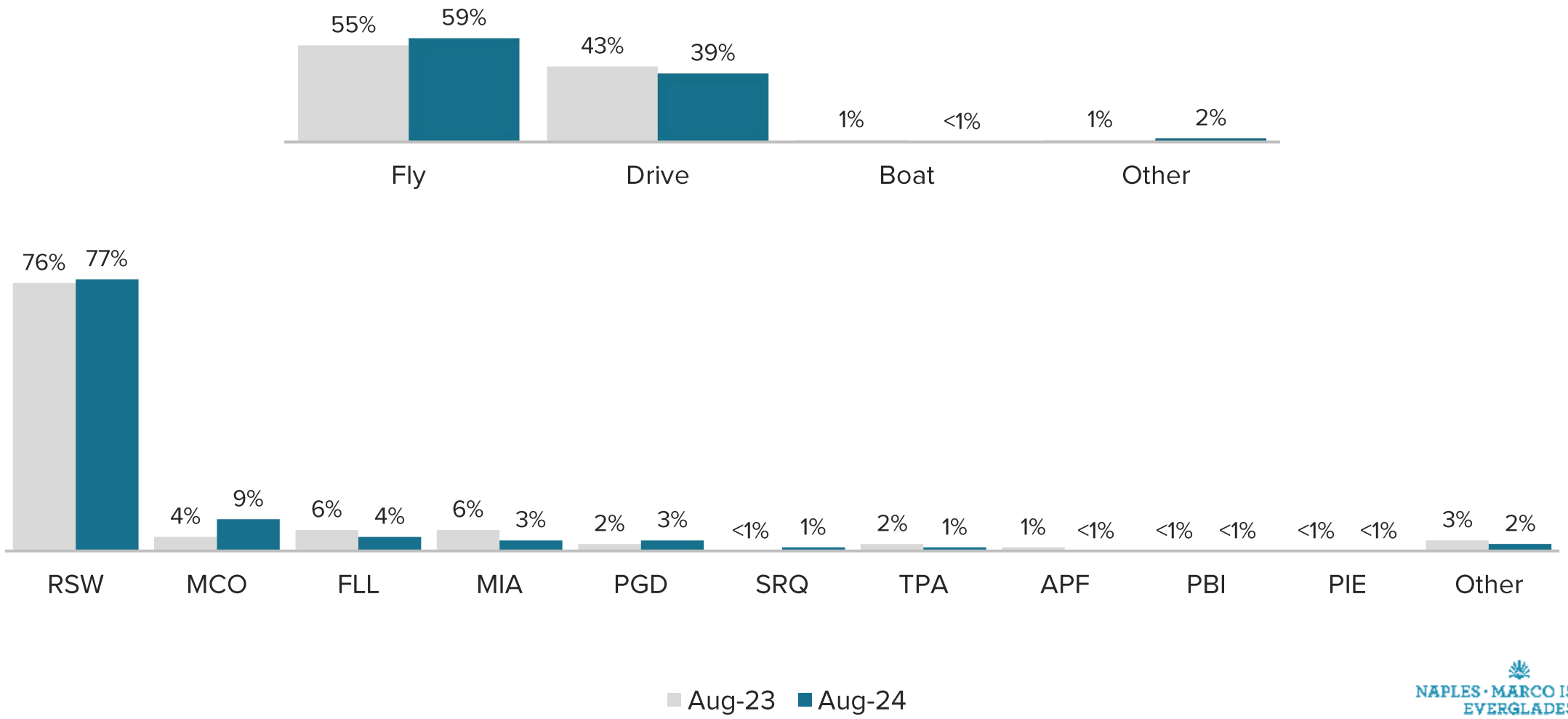

[1] Multiple responses permitted.

# DETAILED FINDINGS | DESTINATIONS CONSIDERED[1]




[1] Multiple responses permitted.

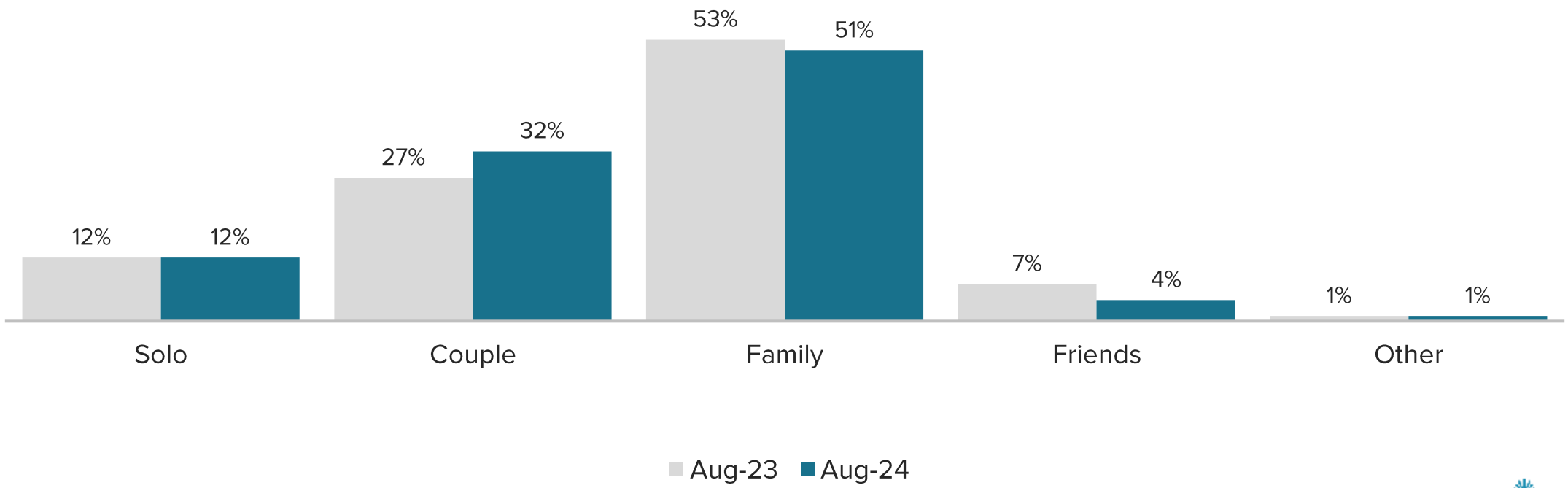
# DETAILED FINDINGS | TRANSPORTATION



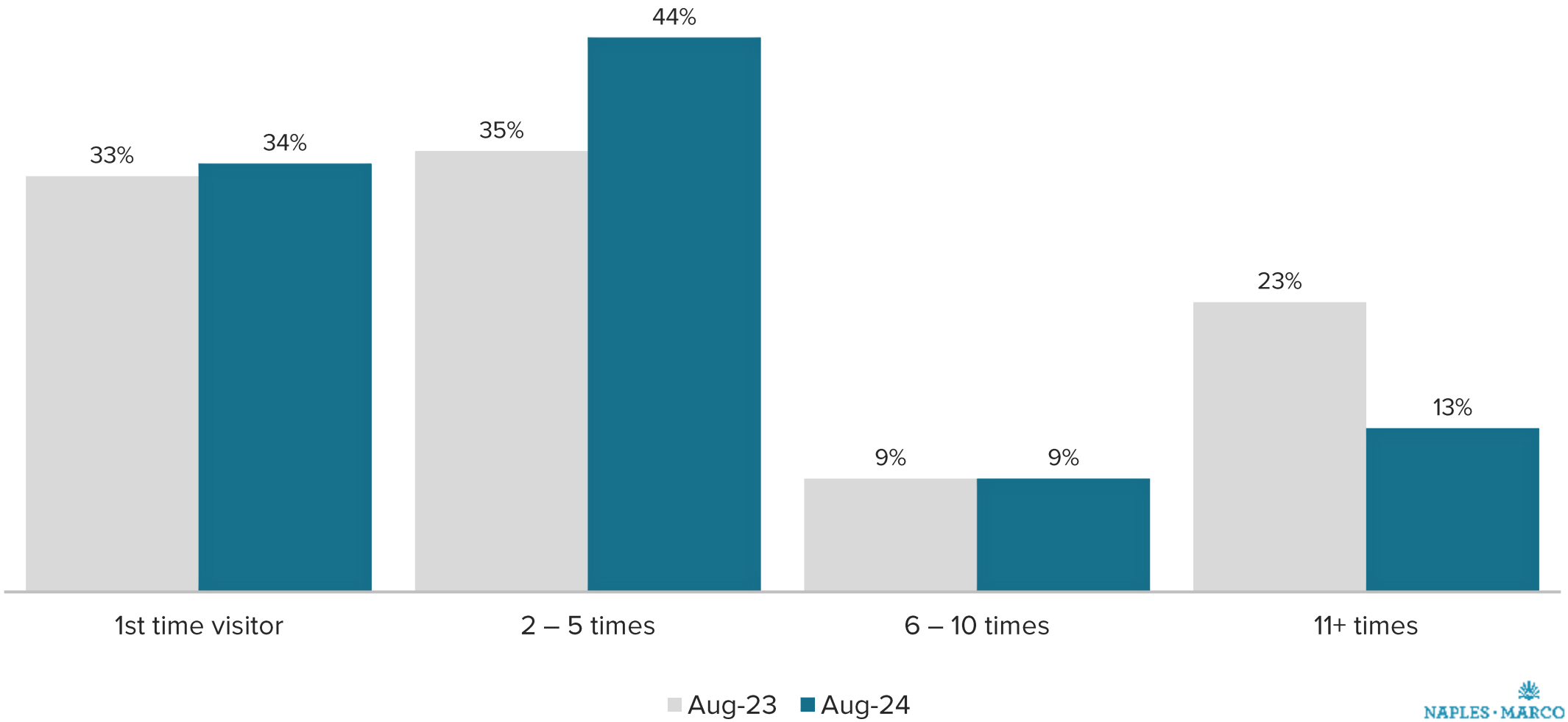
# 3b

## DETAILED FINDINGS: TRAVEL PARTY PROFILE

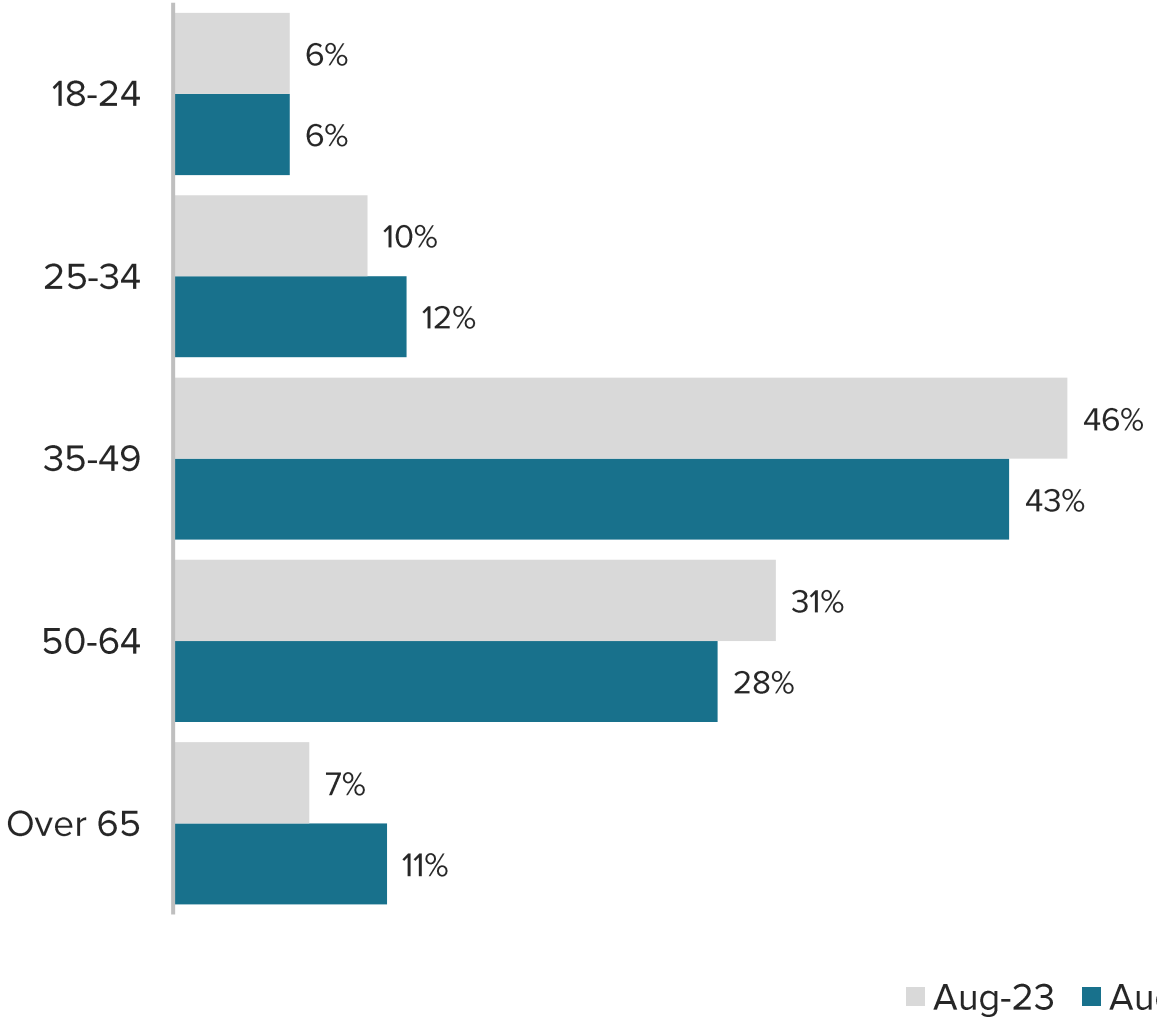
# DETAILED FINDINGS | TRAVEL PARTY TYPE



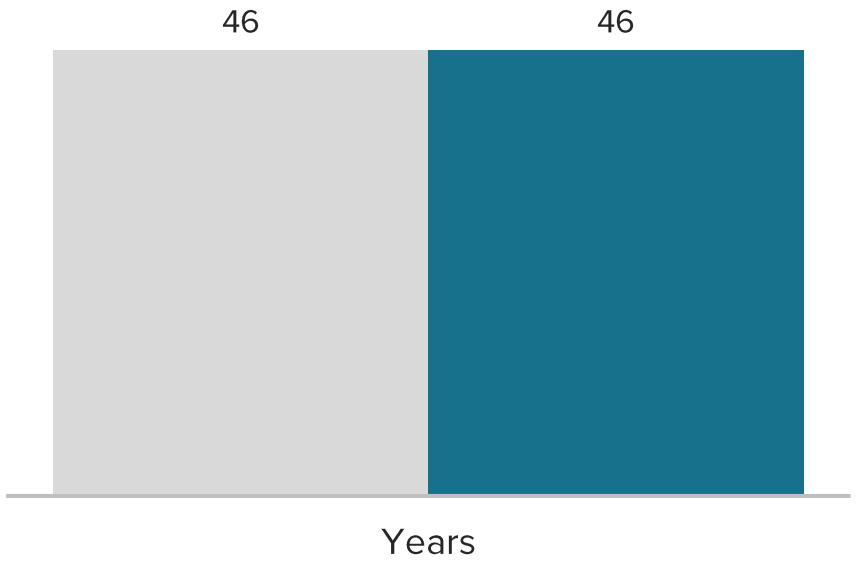
# DETAILED FINDINGS | PREVIOUS VISITS



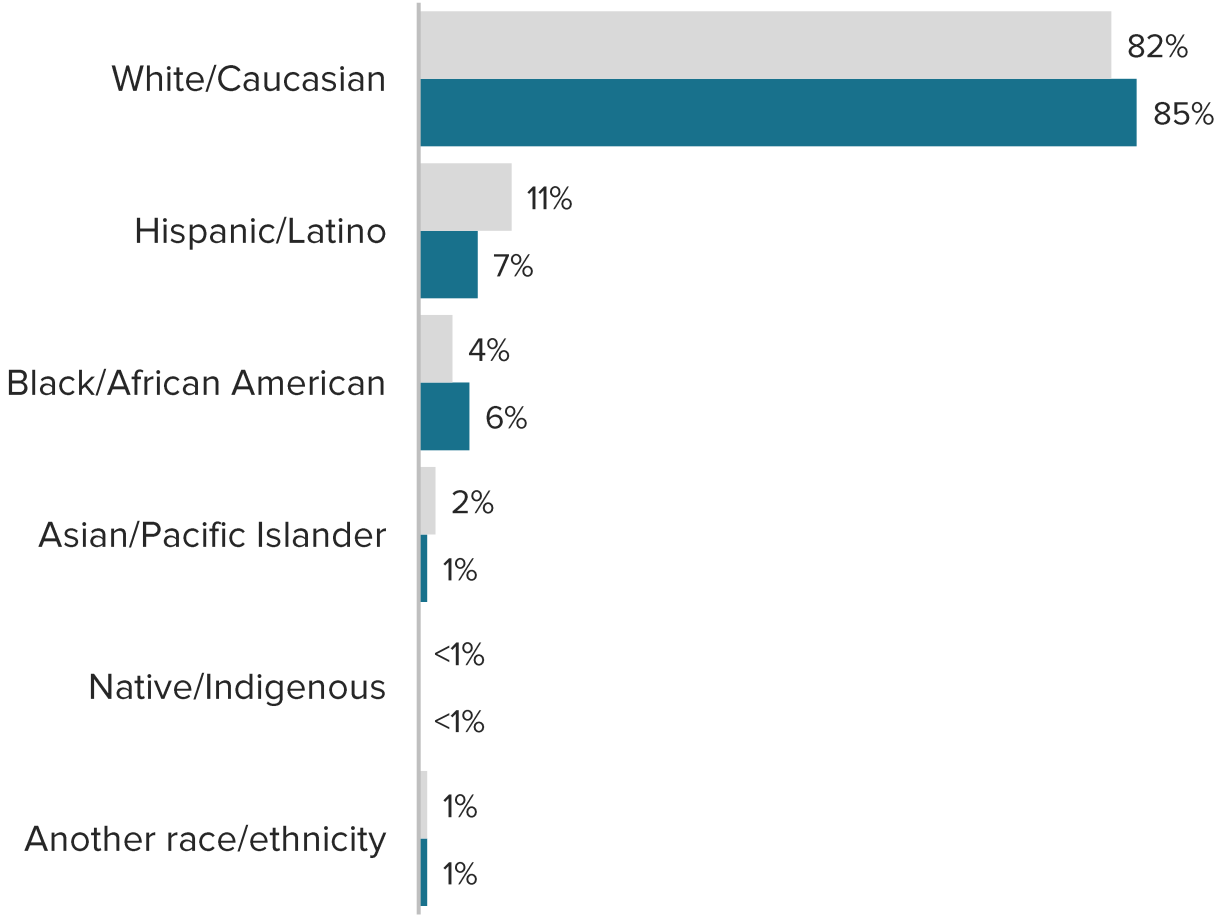
# DETAILED FINDINGS | VISITOR AGES

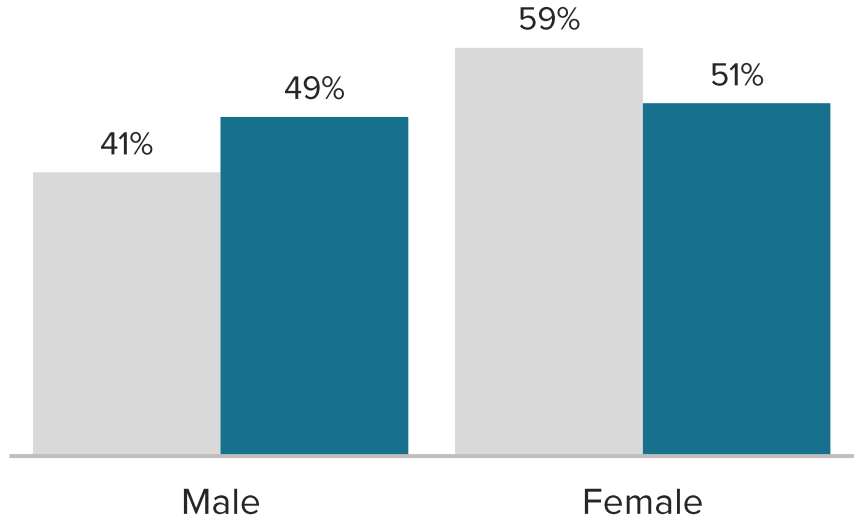



## Median Age



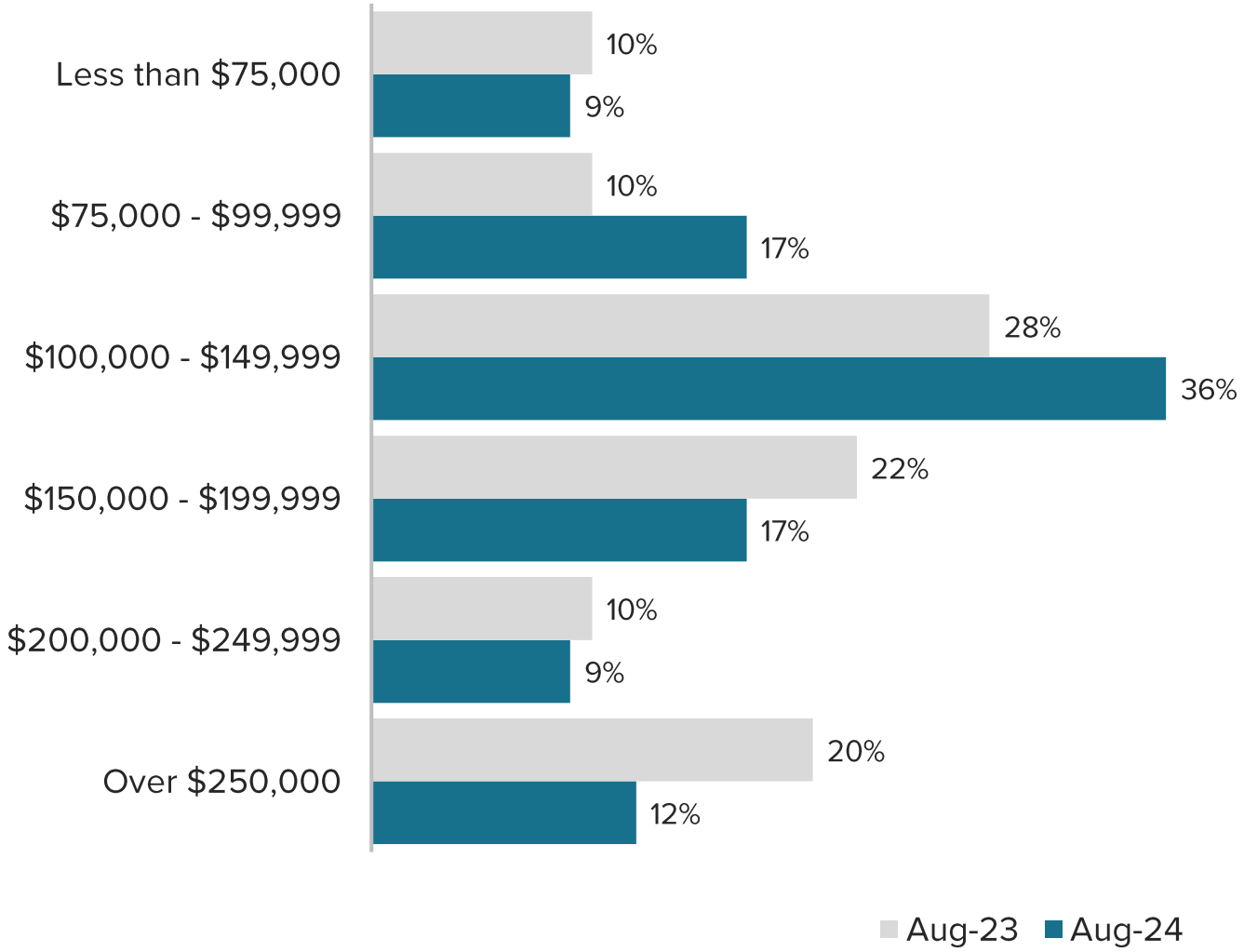
# DETAILED FINDINGS | VISITOR RACE & GENDER[1]



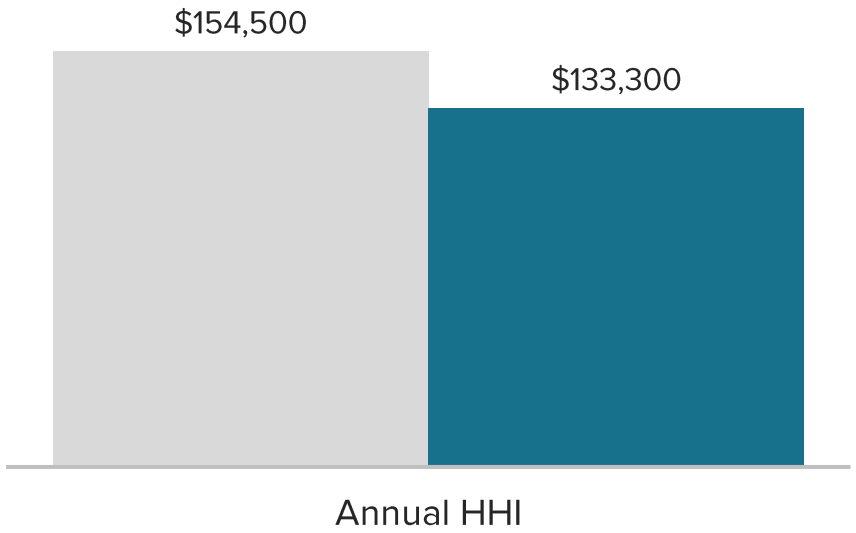




[1]Of person interviewed. Females are generally more likely to agree to participate in survey research.

# DETAILED FINDINGS | VISITOR INCOME




## Median Household Income



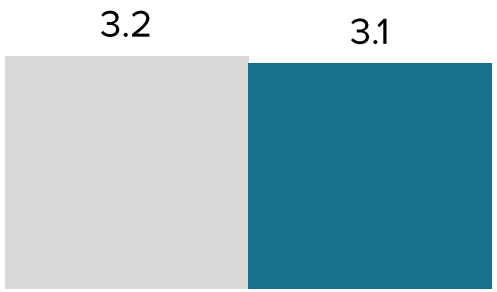
# 3c

## DETAILED FINDINGS: TRIP EXPERIENCE

# DETAILED FINDINGS | TRIP CHARACTERISTICS

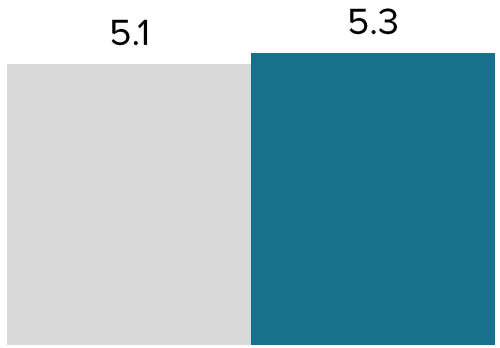
## TRAVEL PARTY SIZE

3.1



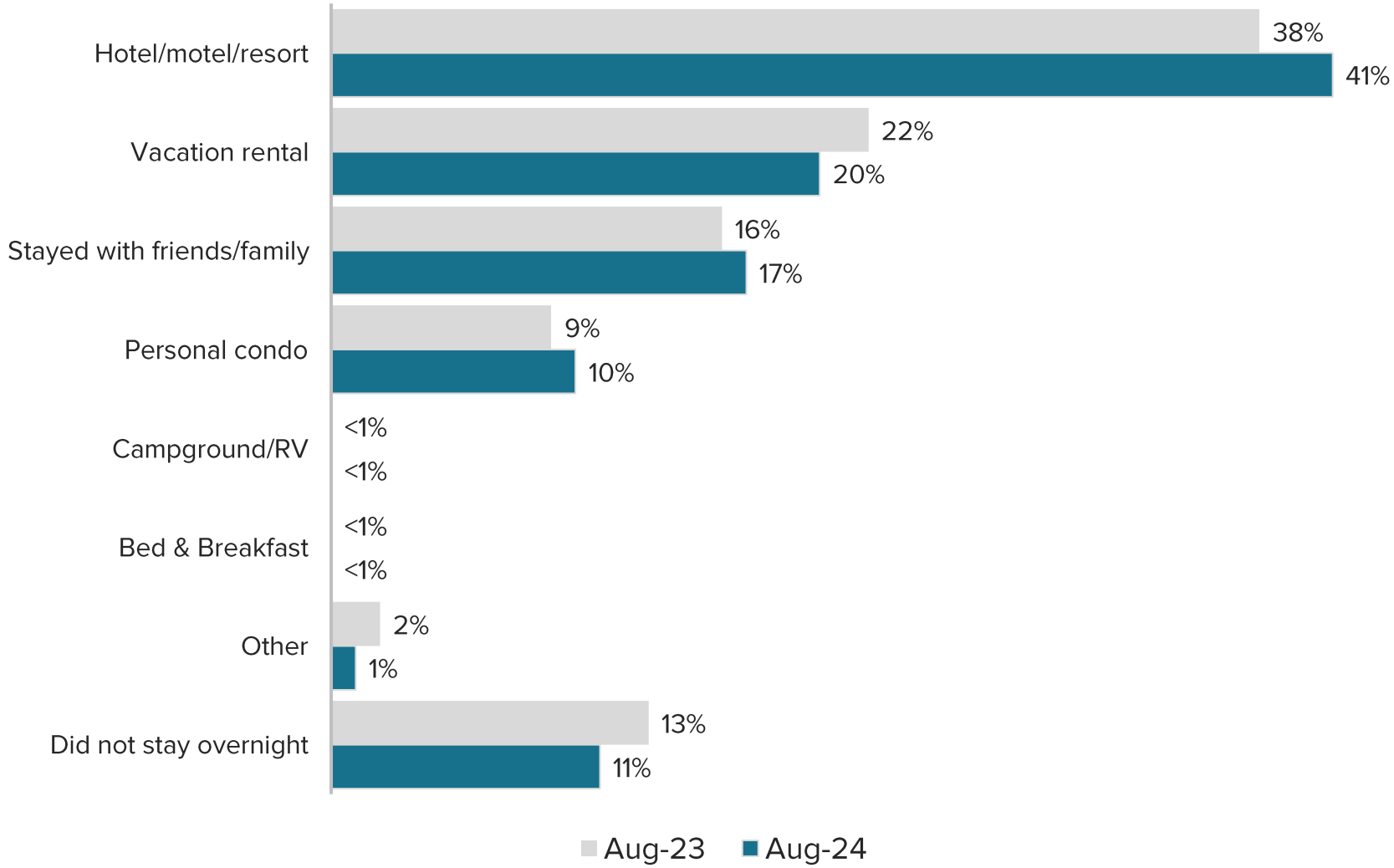

## NIGHTS STAYED

5.3

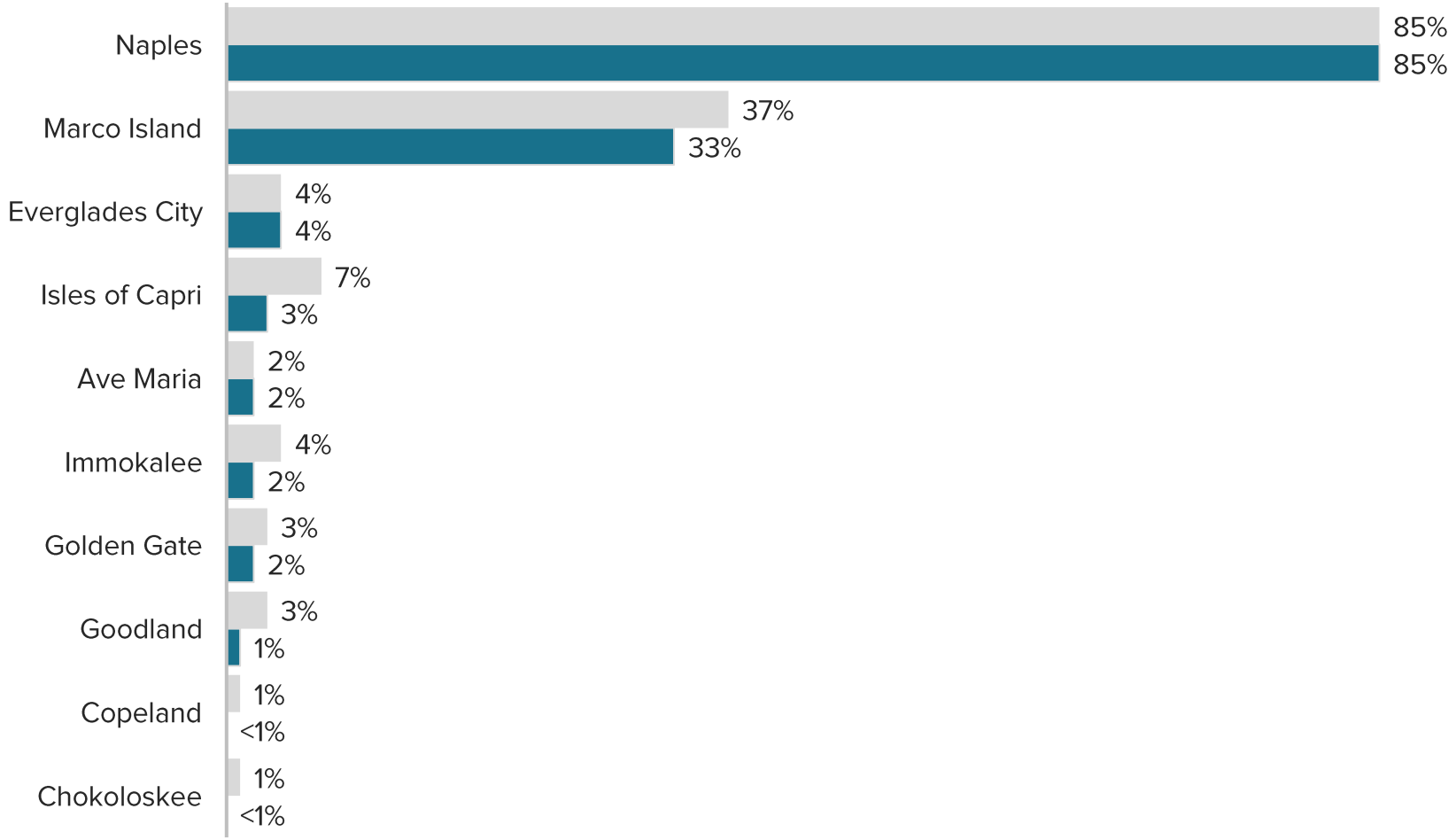



Aug-23 Aug-24

# DETAILED FINDINGS | TYPE OF ACCOMODATIONS

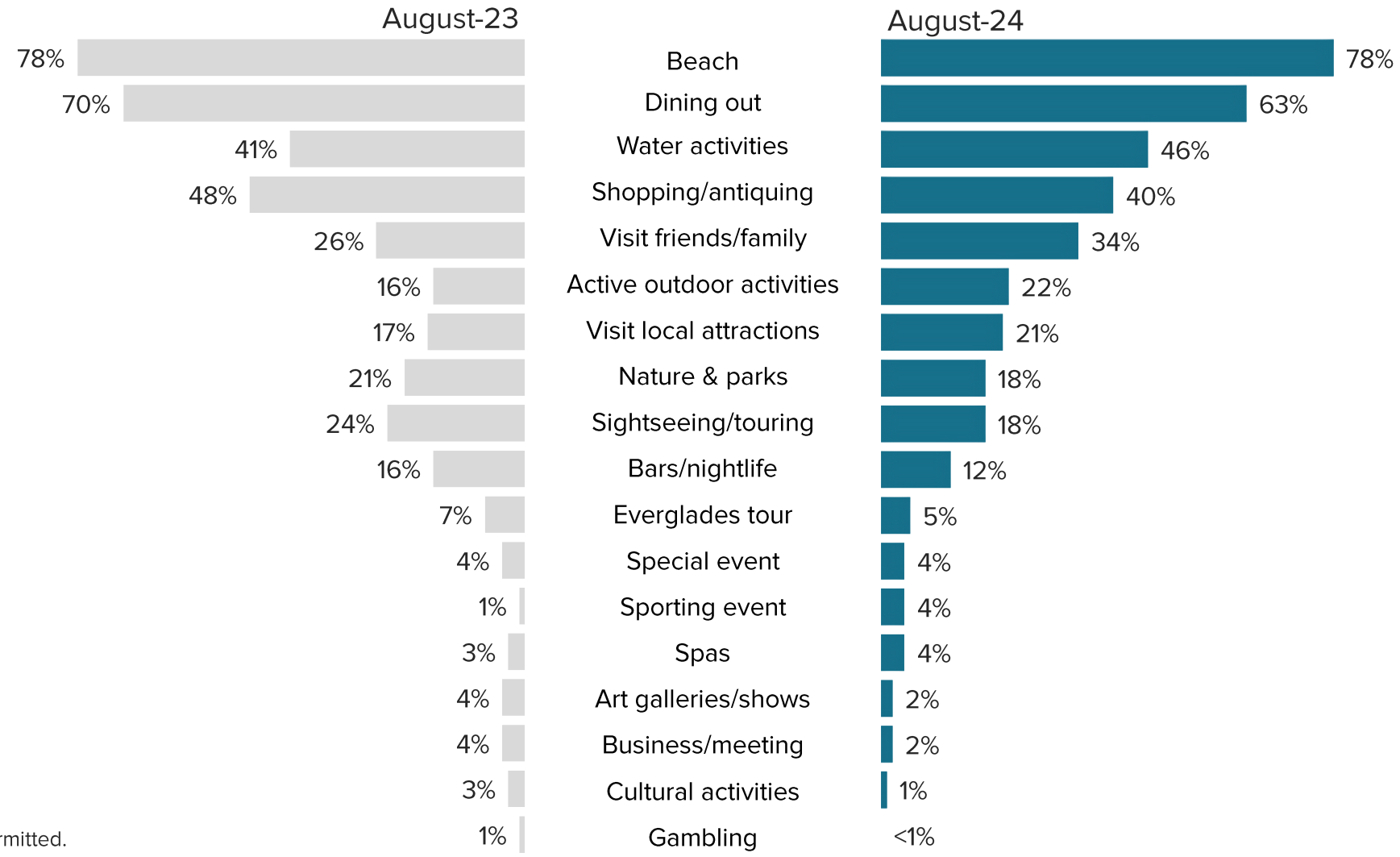


# DETAILED FINDINGS | AREAS VISITED[1]




[1] Multiple responses permitted.

# DETAILED FINDINGS | TRIP ACTIVITIES[1]




[1] Multiple responses permitted.



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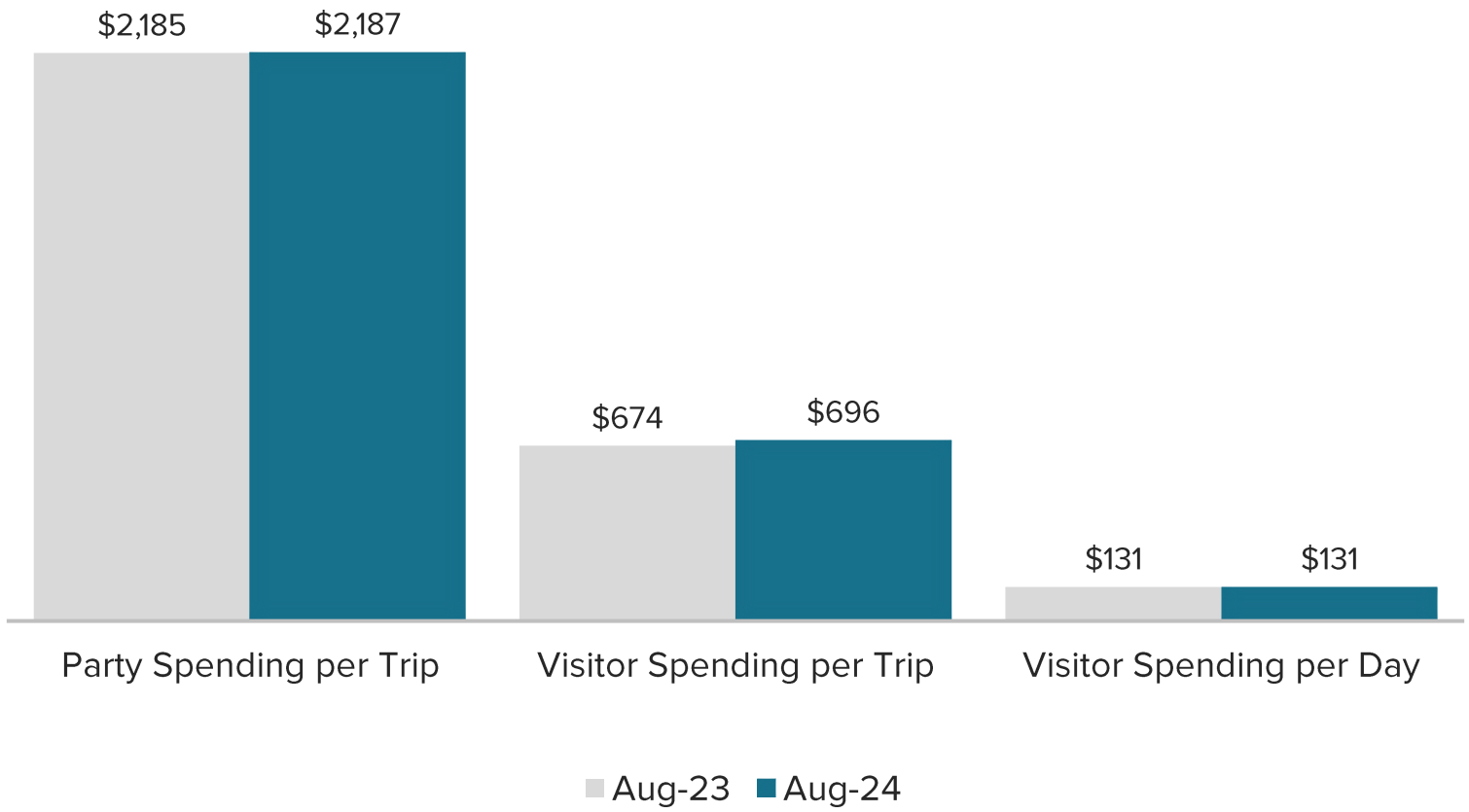
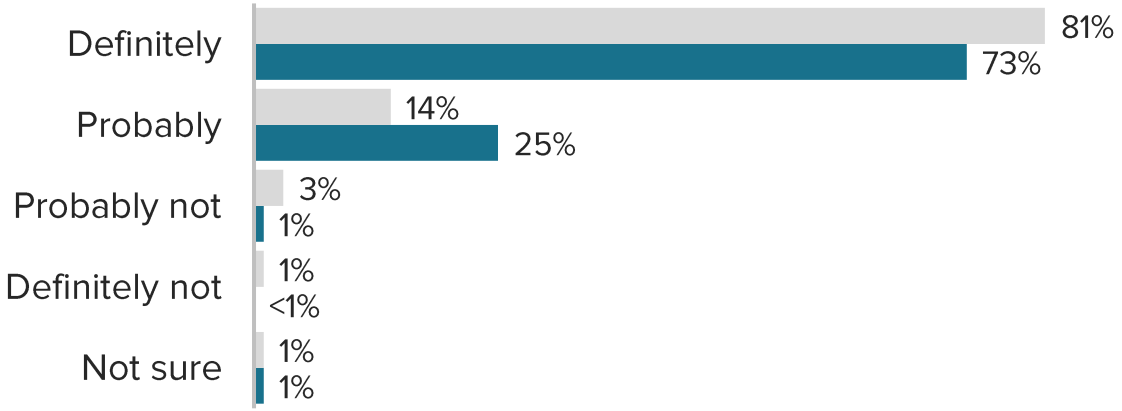
# DETAILED FINDINGS | VISITOR SPENDING



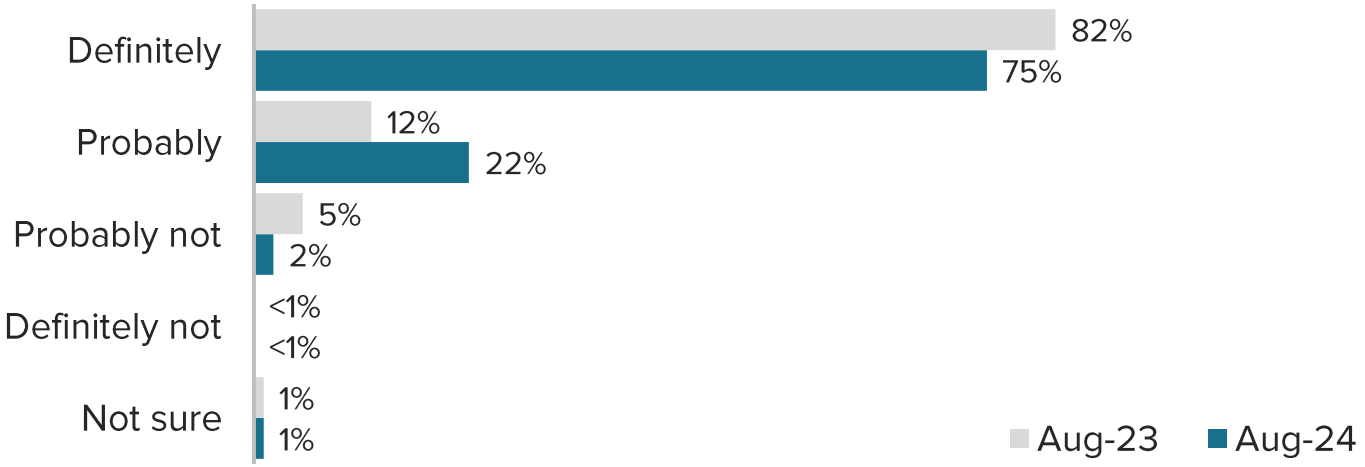
# 3d

## DETAILED FINDINGS: POST-TRIP EVALUATION

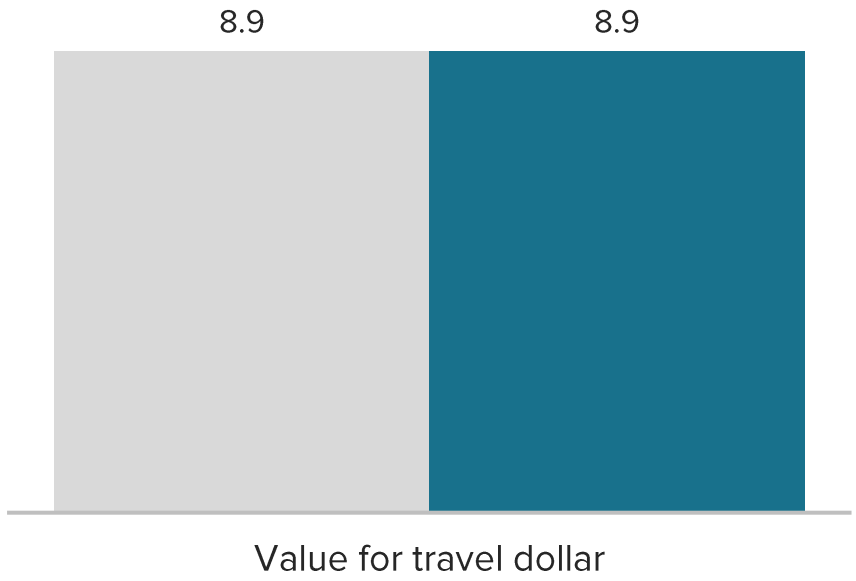
## Will recommend the Naples area?




## Will return to the Naples area?




## VALUE FOR TRAVEL DOLLAR[1,2]




[1] 10-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.

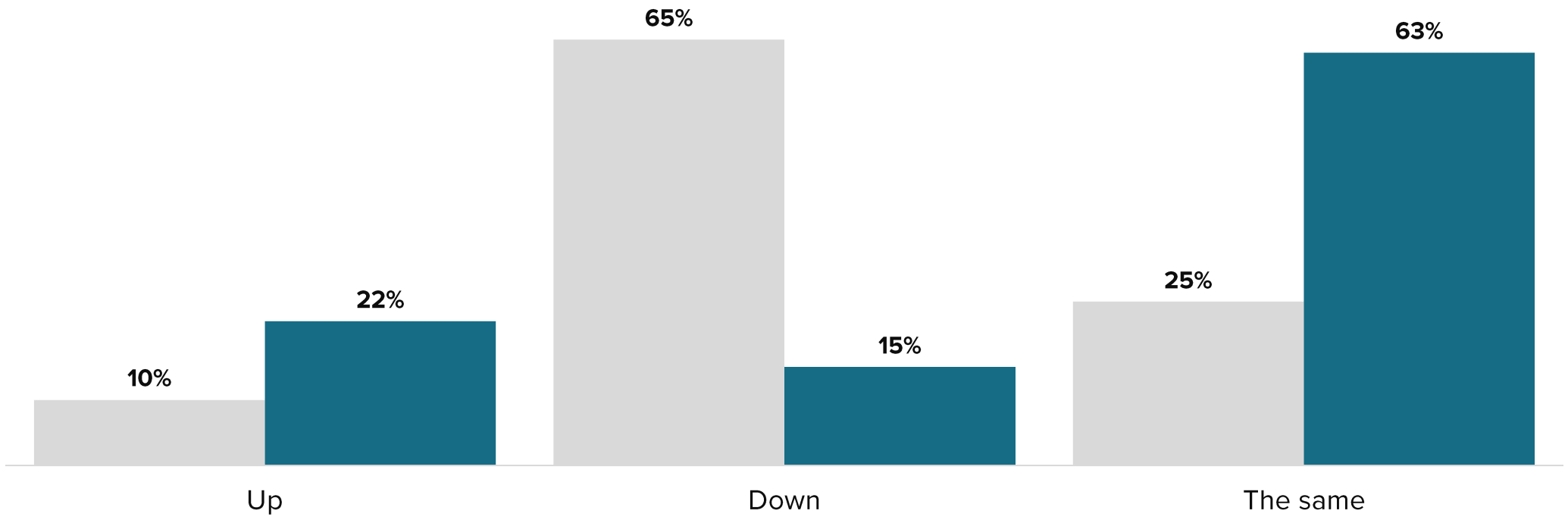
# 4

## OCCUPANCY BAROMETER

# OCCUPANCY BAROMETER[1] | AUG - OCT

downs & st. germain RESEARCH

**Looking ahead to the next three months, are your property's reservations up, down, or the same compared to this time last year?**




[1]Source: Data provided by Collier County hotel and vacation rental partners who respond to DSG's Monthly Occupancy Survey

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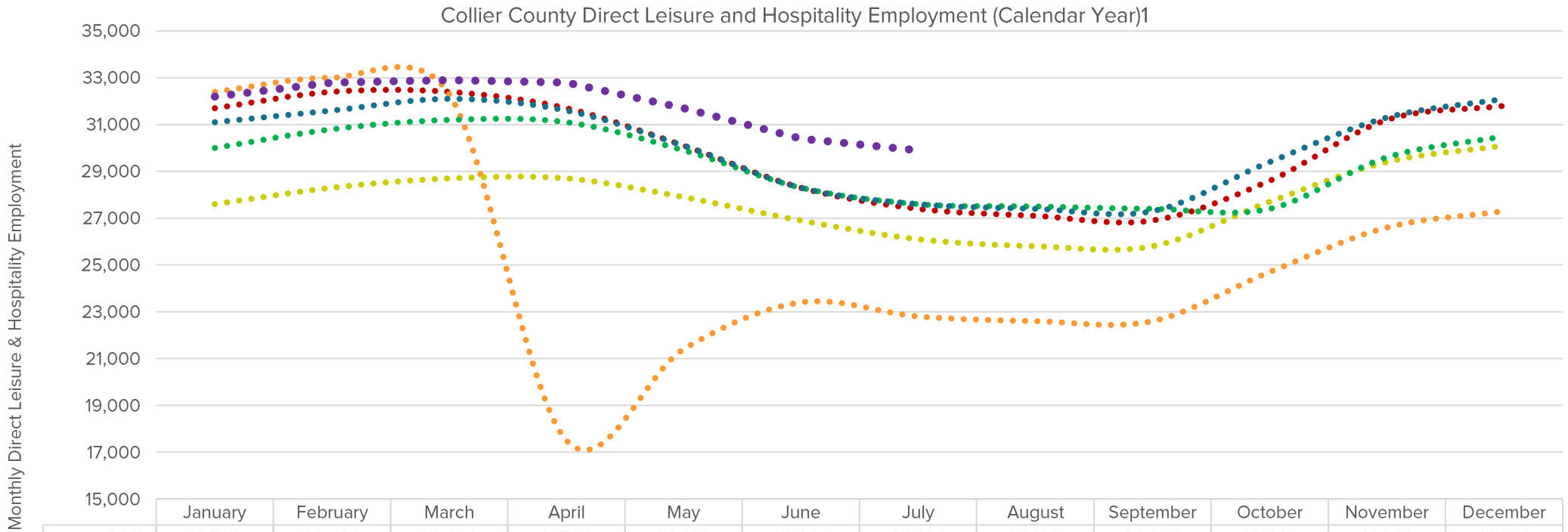
# 5

# INDUSTRY DATA

# INDUSTRY DATA | CURRENT EMPLOYMENT

downs & st. germain RESEARCH




| | January | February | March | April | May | June | July | August | September | October | November | December |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2019 | 31,700 | 32,400 | 32,400 | 31,700 | 30,100 | 28,300 | 27,400 | 27,100 | 26,900 | 28,600 | 31,200 | 31,800 |
| 2020 | 32,400 | 33,000 | 32,300 | 17,500 | 21,400 | 23,400 | 22,800 | 22,600 | 22,600 | 24,700 | 26,600 | 27,300 |
| 2021 | 27,600 | 28,300 | 28,700 | 28,700 | 27,900 | 26,900 | 26,100 | 25,800 | 25,800 | 27,700 | 29,400 | 30,100 |
| 2022 | 30,000 | 30,800 | 31,200 | 31,100 | 29,900 | 28,300 | 27,600 | 27,500 | 27,400 | 27,400 | 29,600 | 30,500 |
| 2023 | 31,100 | 31,600 | 32,100 | 31,600 | 30,100 | 28,300 | 27,600 | 27,400 | 27,300 | 29,400 | 31,300 | 32,100 |
| 2024 | 32,200 | 32,800 | 32,900 | 32,800 | 31,700 | 30,400 | 29,900 (P) | | | | | |

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

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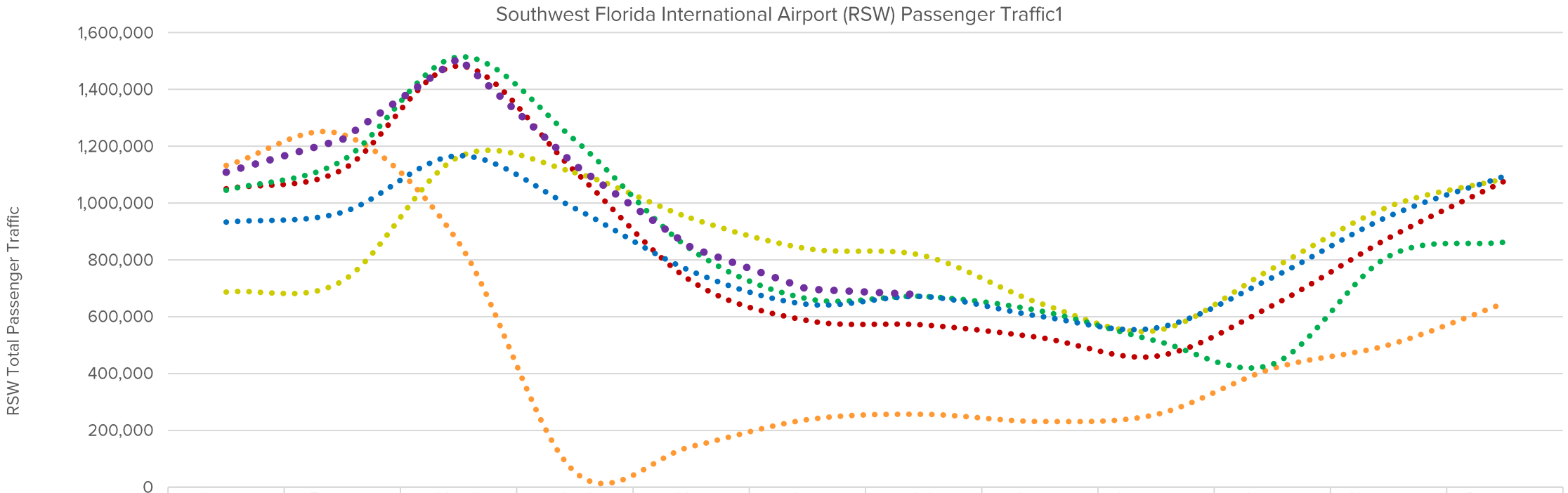
# INDUSTRY DATA | RSW PASSENGER TRAFFIC

downs & st. germain RESEARCH




| | 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 | 1,133,256 | 843,270 | 696,867 | 677,137 | | | | | |

[1]SOURCE: Lee County Port Authority Monthly Statistics.

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# INDUSTRY DATA | LICENSED RENTAL UNITS

downs & st. germain RESEARCH

| August 2024 Licensed Transient Rental Units | | | | |
|---|---|---|---|---|
| | **Hotel** | **Motel** | **Vacation Rental** | **Total** |
| Naples | 4,731 | 1,270 | 3,108 | 9,109 |
| Marco Island | 1,275 | 121 | 2,081 | 3,477 |
| 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** | 6,044 | **1,665** | **5,330** | **13,039**[2] |

[1] SOURCE: Florida Department of Business & Professional Regulation.

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# Questions?

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THANK YOU