

DECEMBER 2023 MONTHLY SNAPSHOT



This report and all future reports will be focused on ALL visitors, which includes day trippers as well as visitors staying in unpaid accommodations. Prior to 2023, reports were based solely on data from visitors who stayed in paid accommodations.



Visitation and Visitor Days increased significantly, largely driven by more visitors staying in second homes and with friends and family.



The occupancy rate for vacation rental homes increased significantly compared to December of 2022.



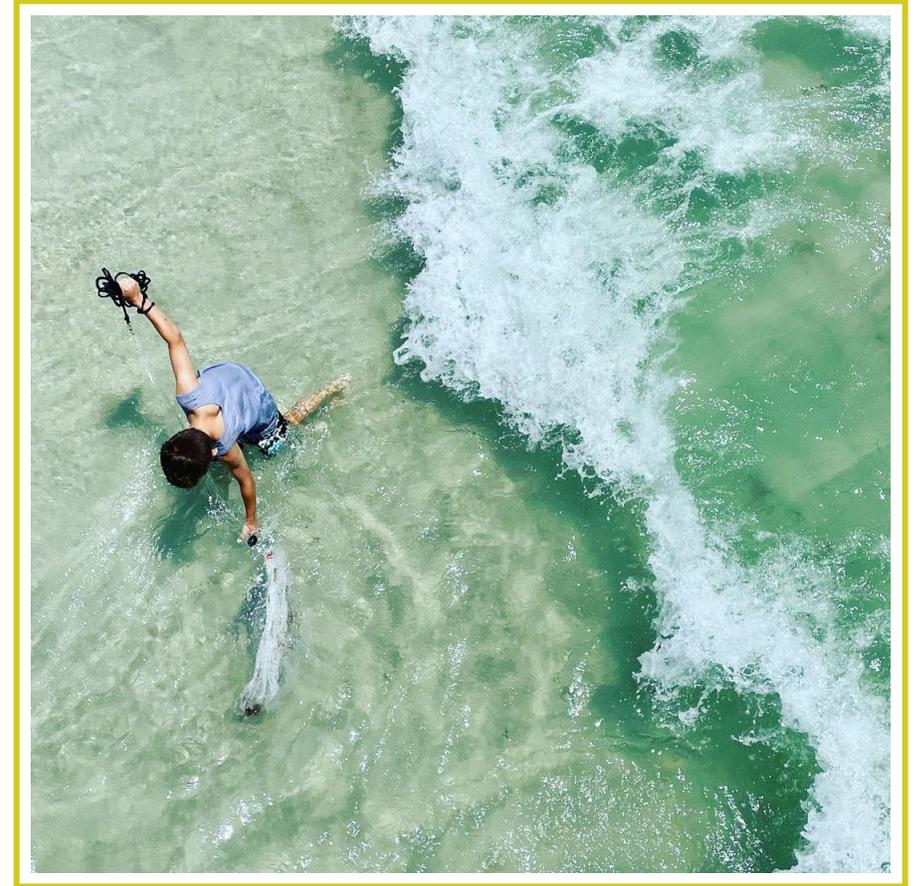
International visitation increased from December of 2022, with visitation from Europe exceeding visitation from Canada for the second consecutive month.

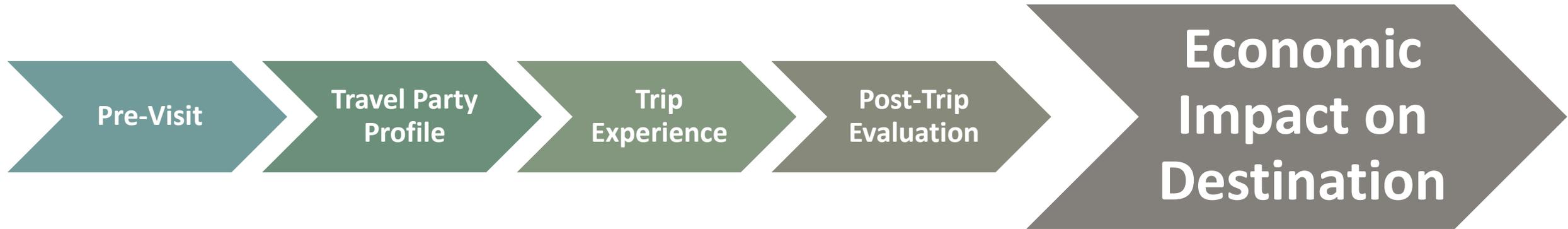


All figures related to families increased in December 2023, including the share of visitors who said “Visiting Friends/Family” was a main reason for visiting and the share of visitors who said the family-friendliness of the destination was a main reason for choosing the area over other destinations.



Trip evaluations and customer satisfaction ratings again showed improvement across the board when compared to 2022 levels.

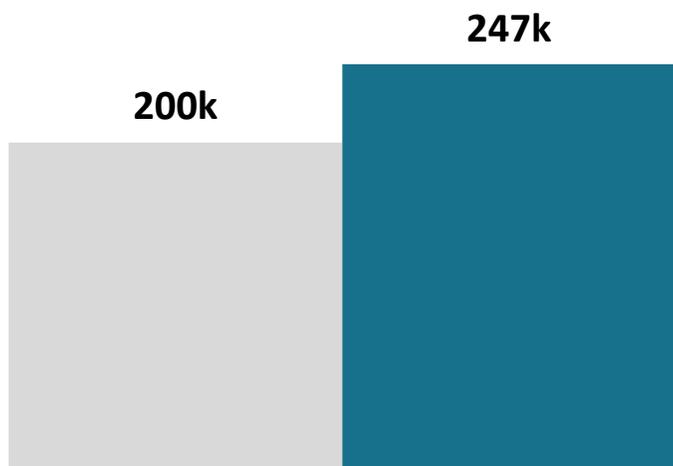




DECEMBER 2023 VISITATION & ROOM NIGHTS

VISITORS

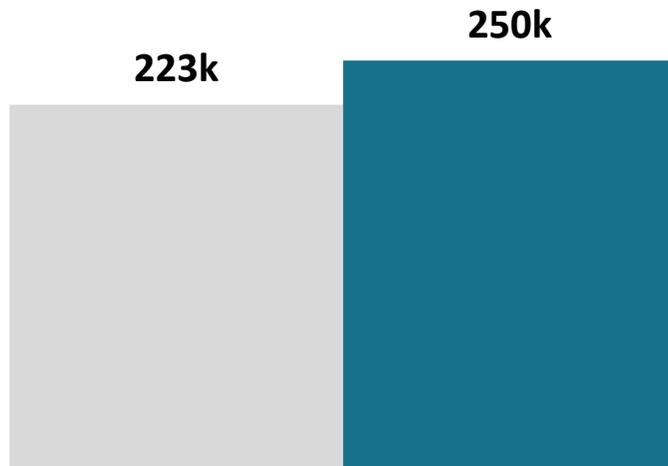
247,200



+ 23.9% from 2022

ROOM NIGHTS

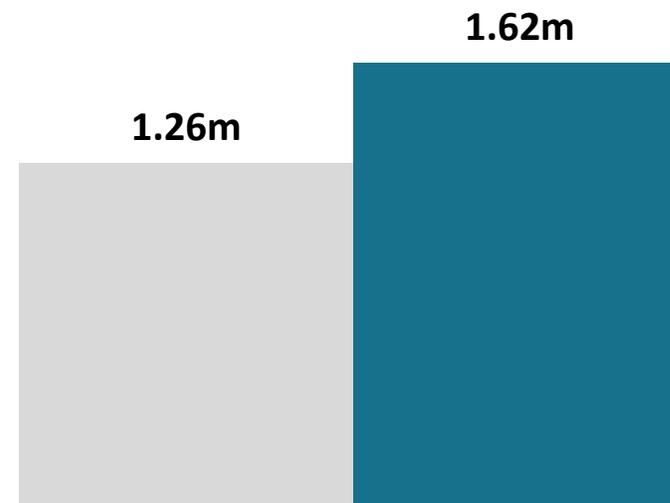
249,500



+ 12.1% from 2022

VISITOR DAYS

1,624,100

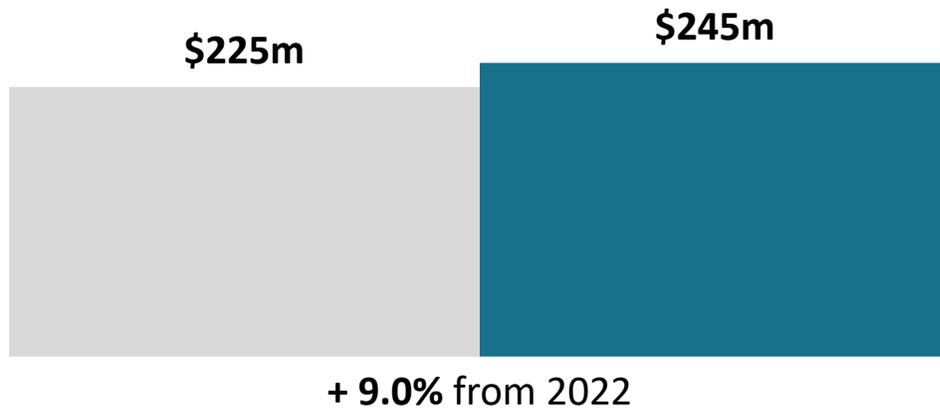


+ 29.2% from 2022

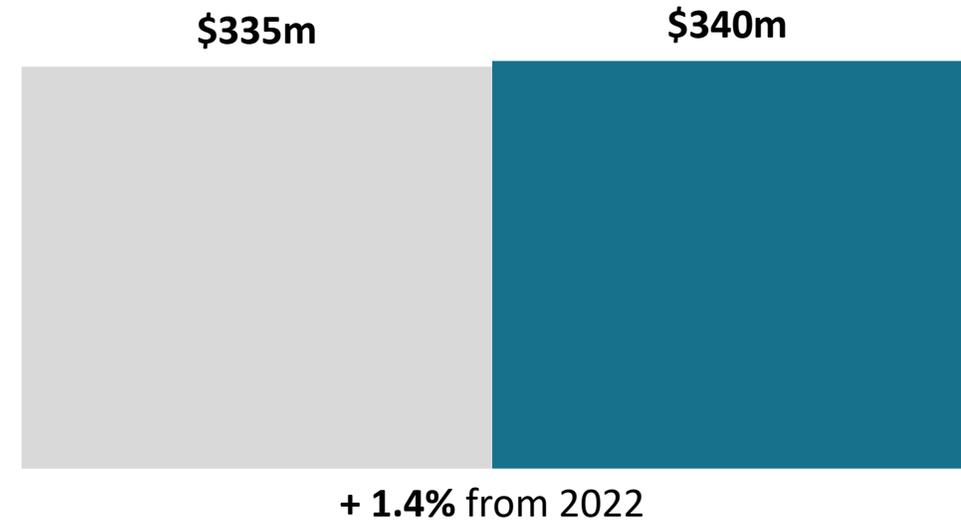
■ Dec-22 ■ Dec-23

DECEMBER 2023 SPENDING & ECONOMIC IMPACT¹

DIRECT SPENDING
\$245,115,300



ECONOMIC IMPACT
\$340,220,000



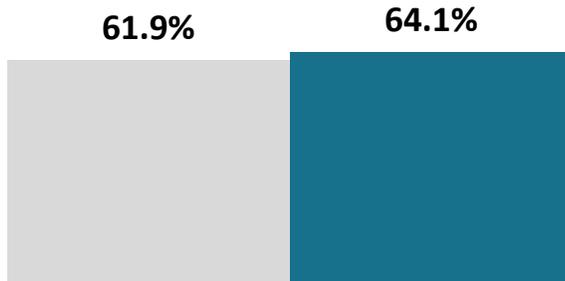
■ Dec-22 ■ Dec-23

¹The IMPLAN multiplier for Collier County was 1.491 for 2022 and is 1.388 in 2023.

DECEMBER 2023 OVERALL LODGING METRICS¹

OCCUPANCY RATE

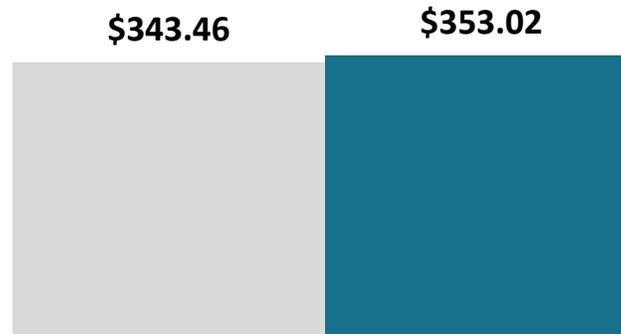
64.1%



+ 3.6% from 2022

AVERAGE DAILY RATE

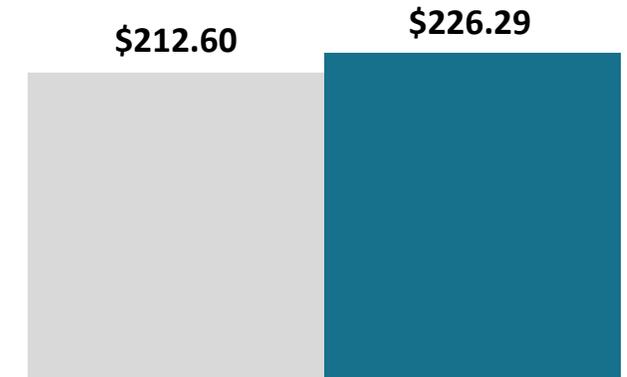
\$353.02



+ 2.8% from 2022

REVENUE PER AVAILABLE ROOM

\$226.29



+ 6.4% from 2022

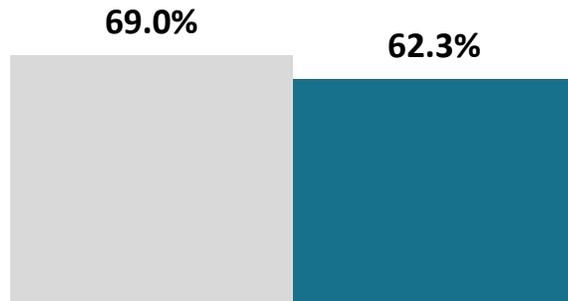
■ Dec-22 ■ Dec-23

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

DECEMBER 2023 HOTEL LODGING METRICS¹

OCCUPANCY RATE

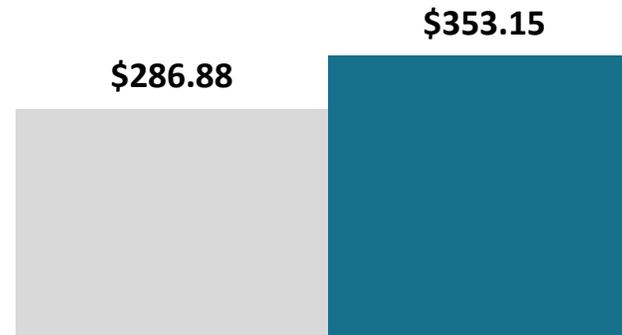
62.3%



- 9.6% from 2022

AVERAGE DAILY RATE

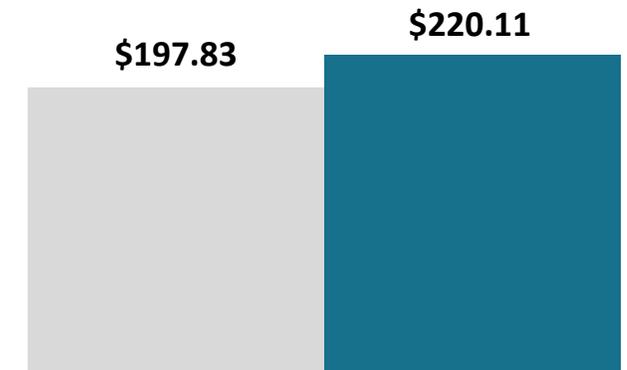
\$353.15



+ 23.1% from 2022

REVENUE PER AVAILABLE ROOM

\$220.11

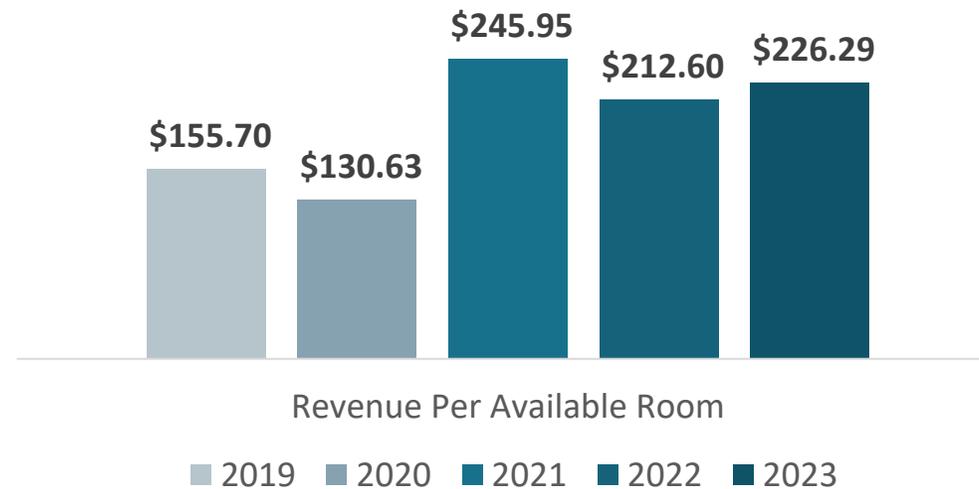
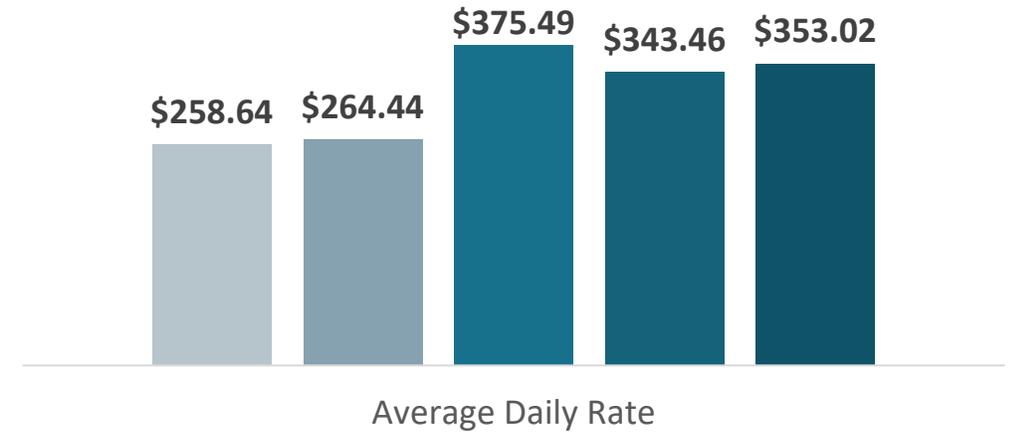
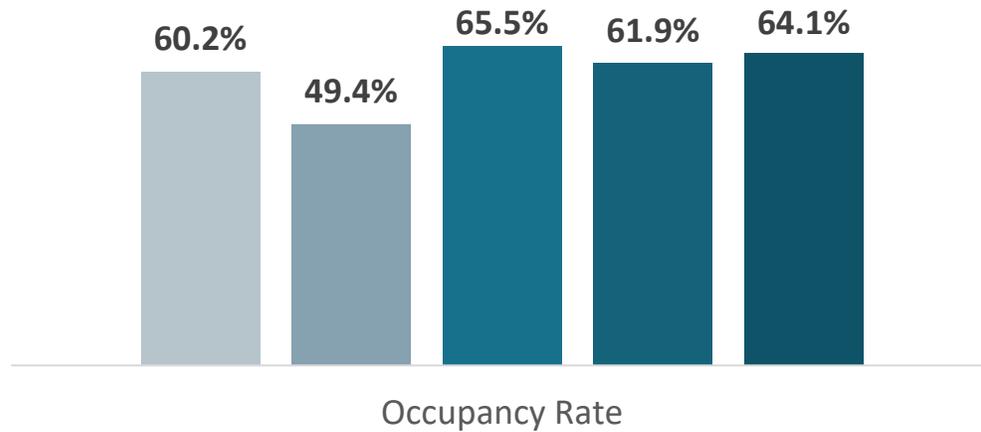


+ 11.3% from 2022

■ Dec-22 ■ Dec-23

¹Source: STR Reports

DECEMBER 2019-2023 OVERALL LODGING METRICS¹



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

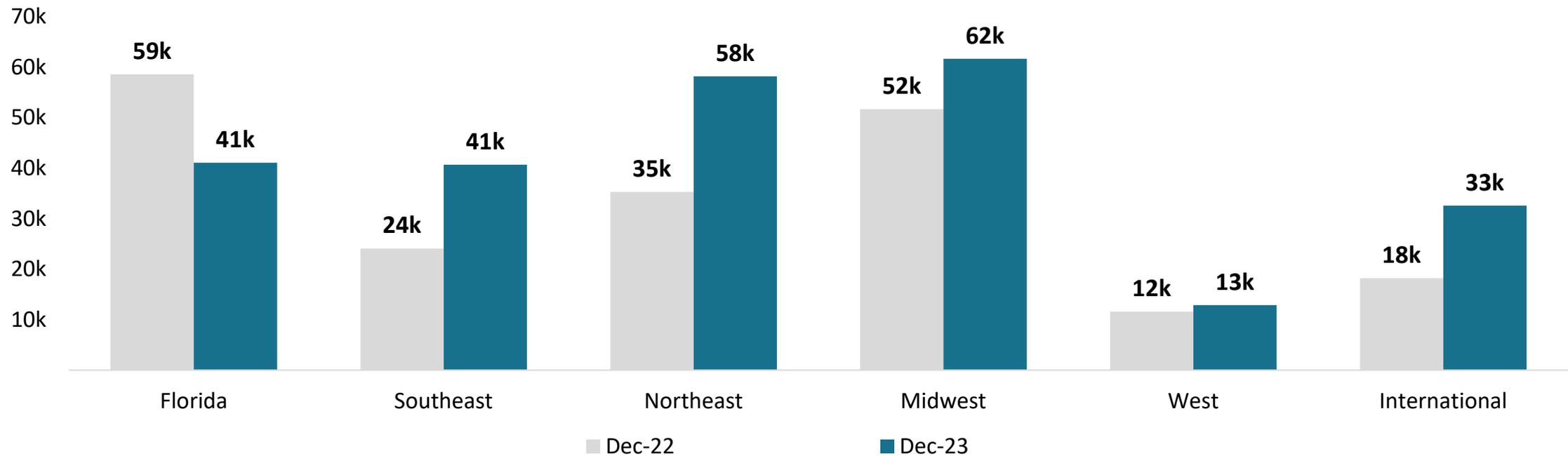
VISITOR ORIGIN

FLORIDA VISITORS

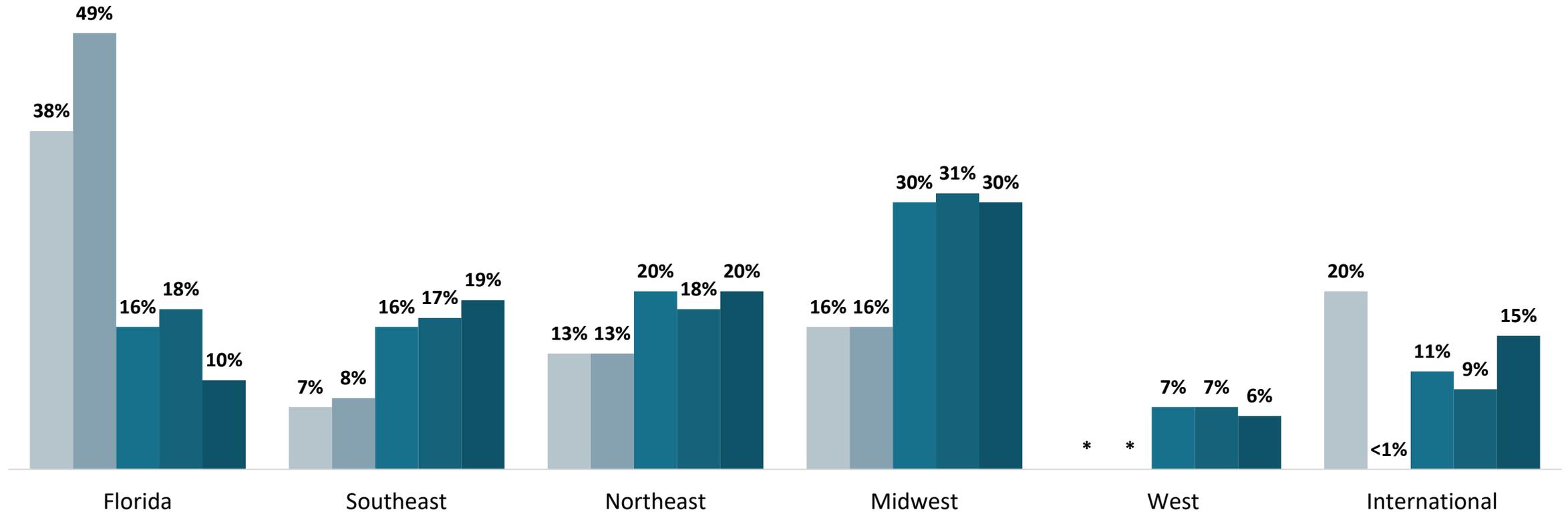
41,100

OUT-OF-STATE VISITORS

206,100



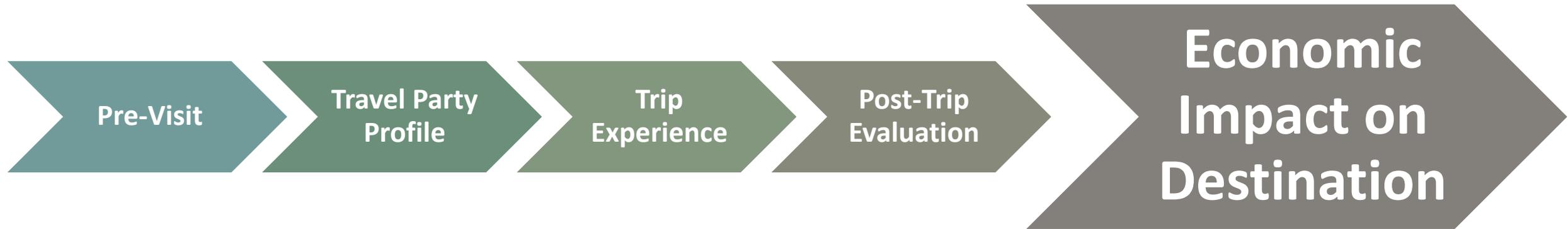
DECEMBER 2019-2023 OVERNIGHT VISITOR ORIGIN



*Note: The "West" was not separated from "Other" before December 2021. Beginning in December 2021, "West" was added and "Other" was changed to "Other International".

■ Dec-19 ■ Dec-20 ■ Dec-21 ■ Dec-22 ■ Dec-23

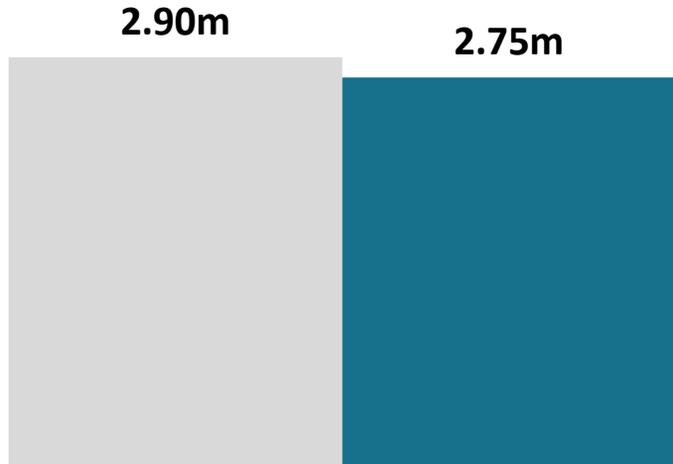
TOURISM METRICS YEAR-TO-DATE (CYTD)



CY VISITATION METRICS

CY VISITORS

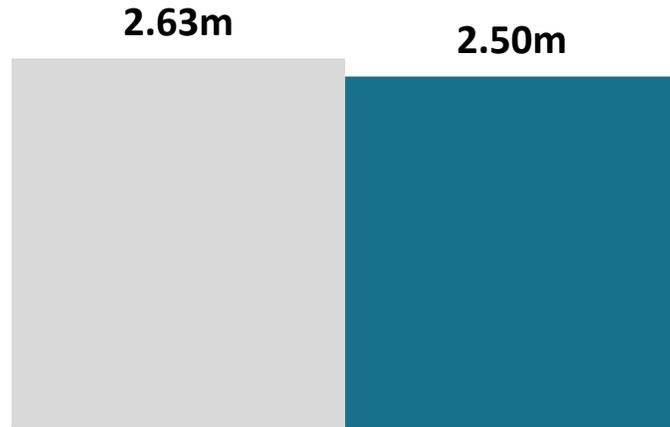
2,754,700



- 4.9% from 2022

CY ROOM NIGHTS

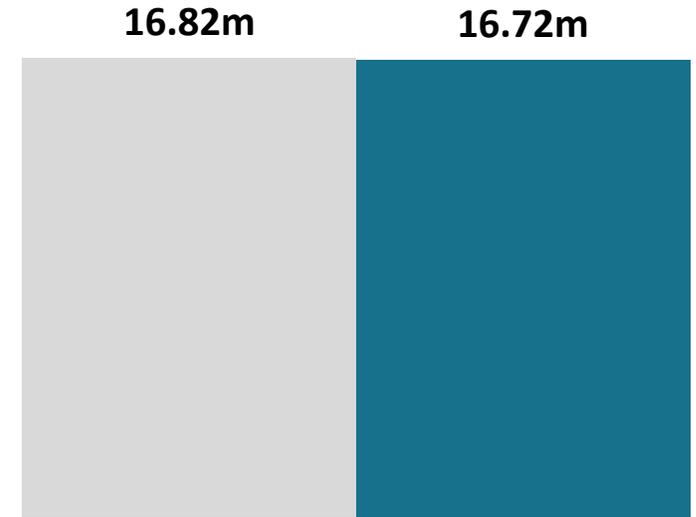
2,498,500



- 4.9% from 2022

CY VISITOR DAYS

16,721,700



- 0.6% from 2022

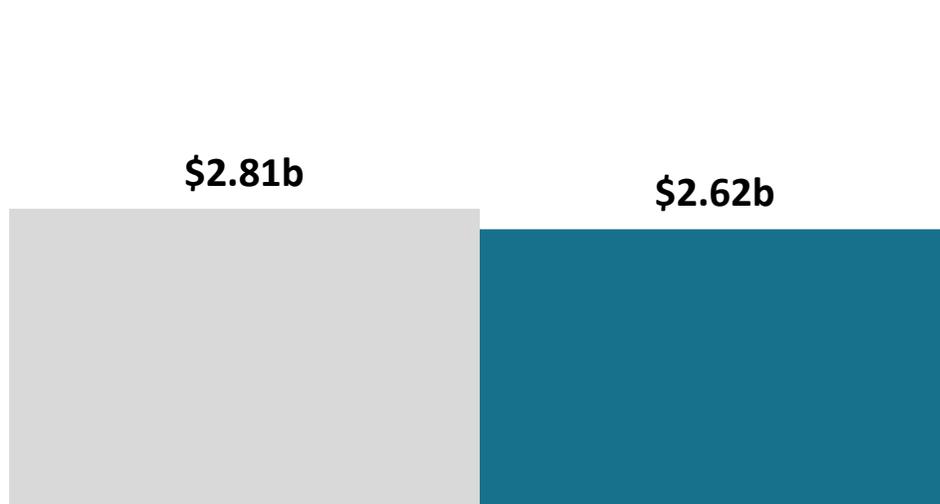
■ Dec-22 ■ Dec-23

CY SPENDING & ECONOMIC IMPACT

CY DIRECT SPENDING

\$2,623,629,300

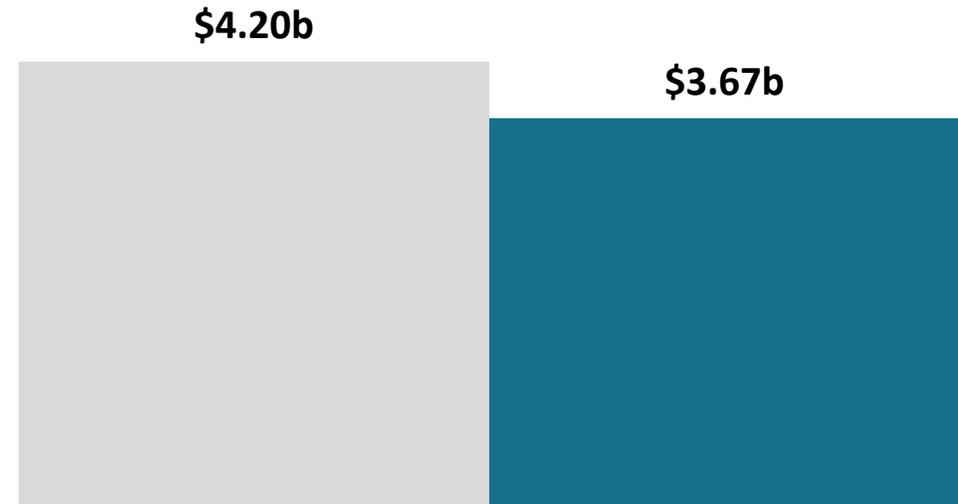
- 6.8% from 2022



CY ECONOMIC IMPACT

\$3,665,660,600

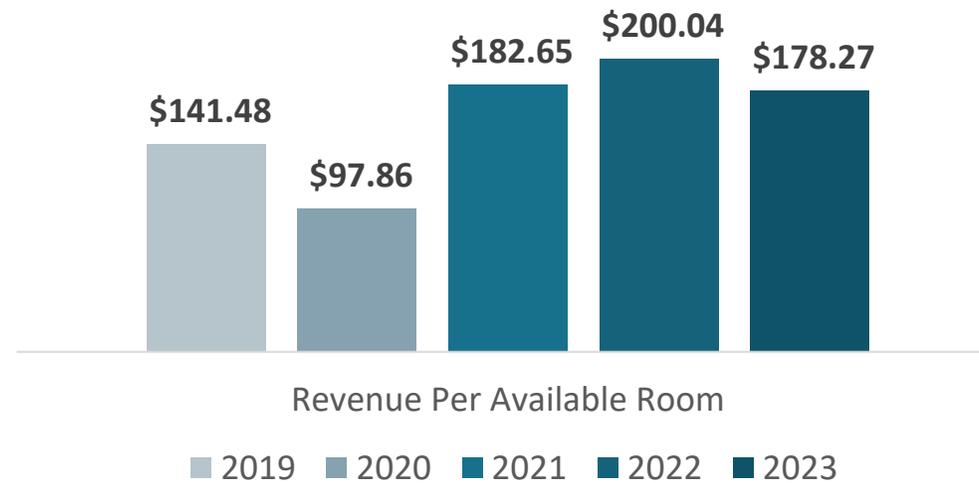
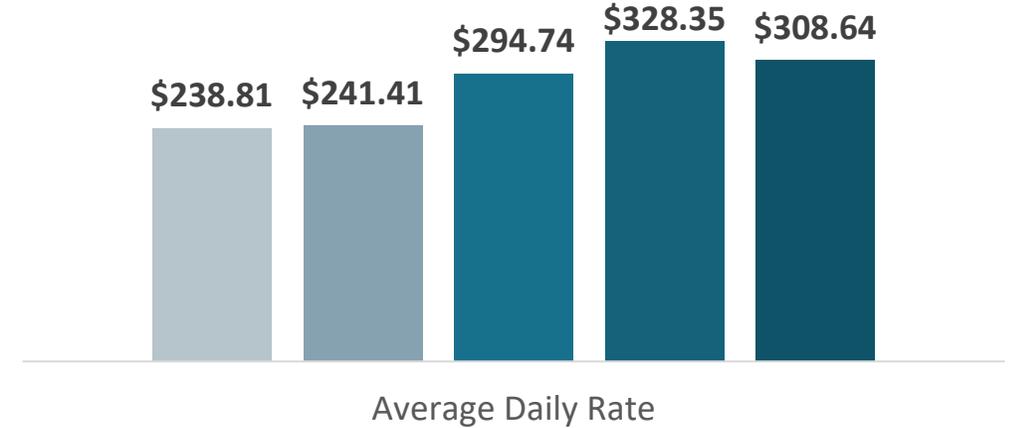
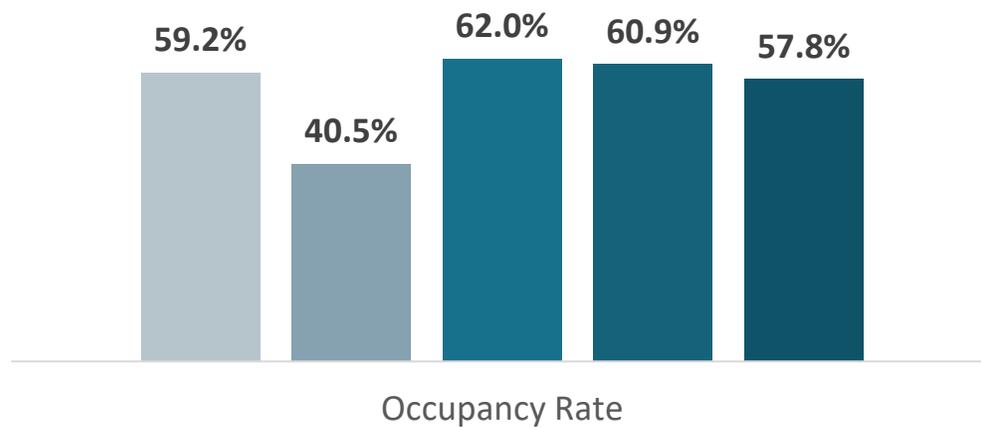
- 12.6% from 2022¹



■ Dec-22 ■ Dec-23

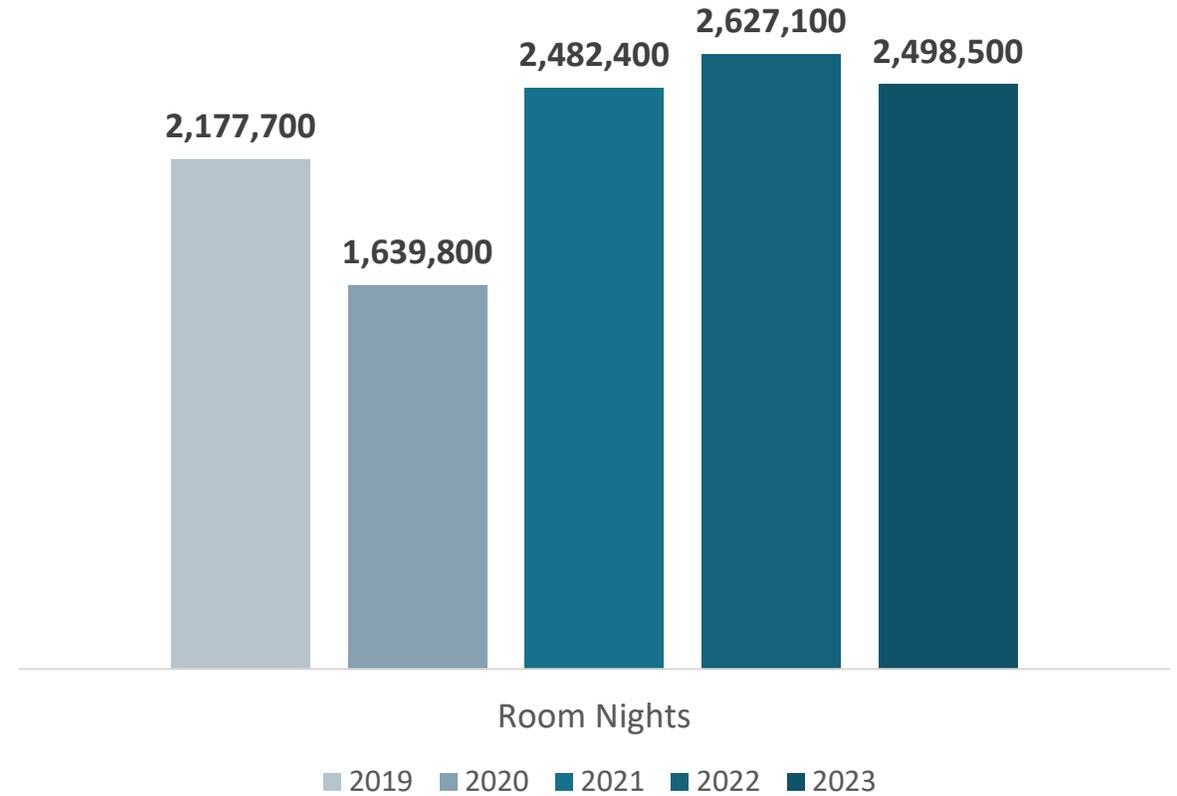
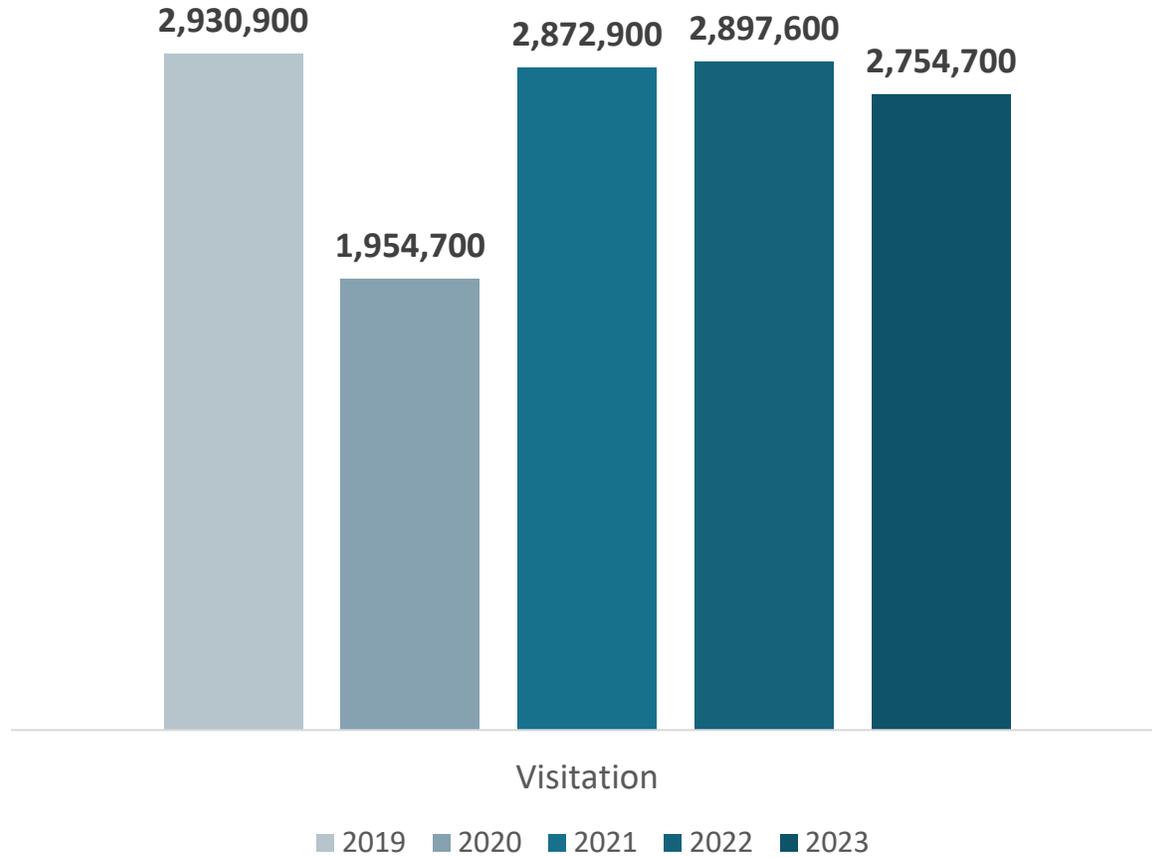
¹The IMPLAN multiplier for Collier County was 1.491 for 2022 and is 1.388 in 2023.

CY 2019-2023 OVERALL LODGING METRICS¹



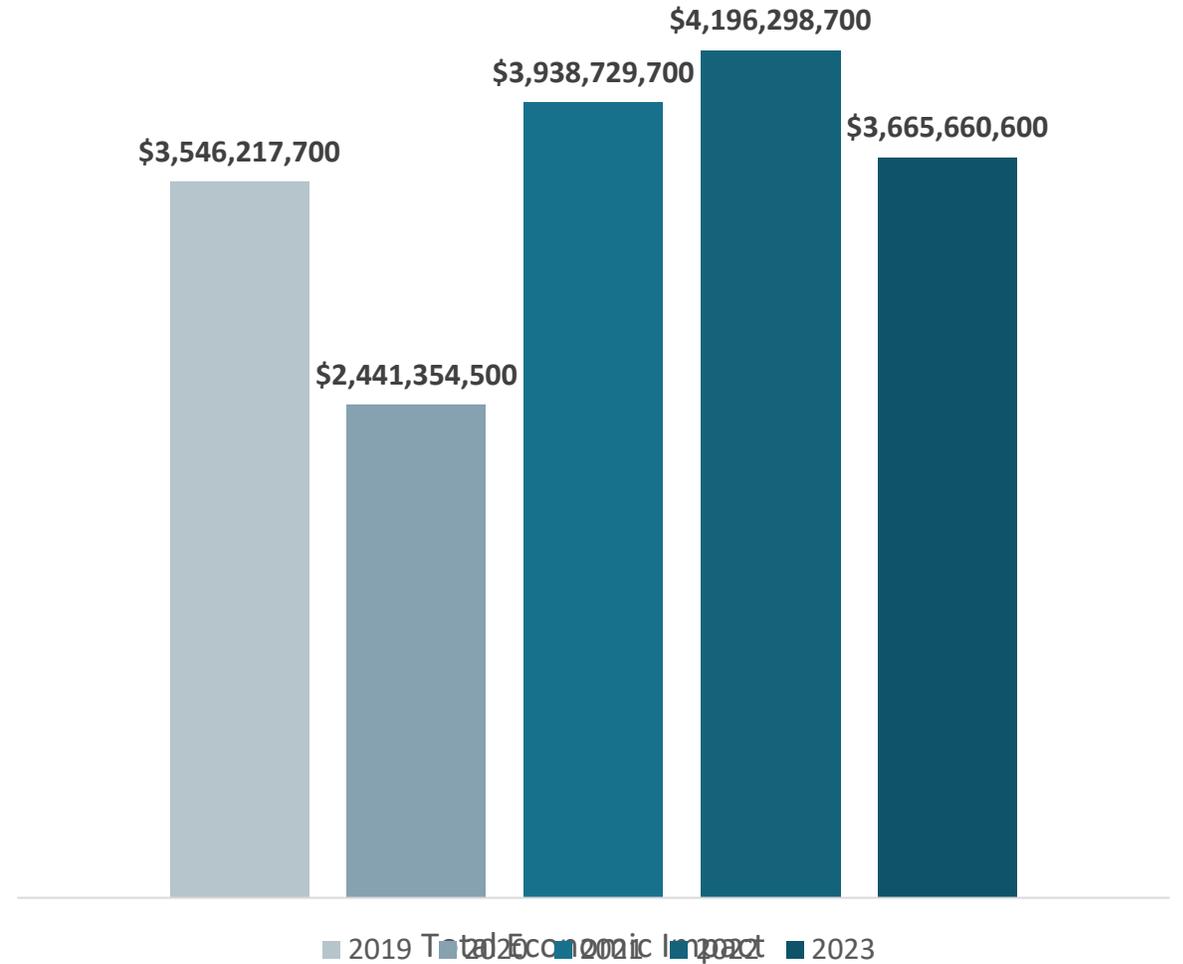
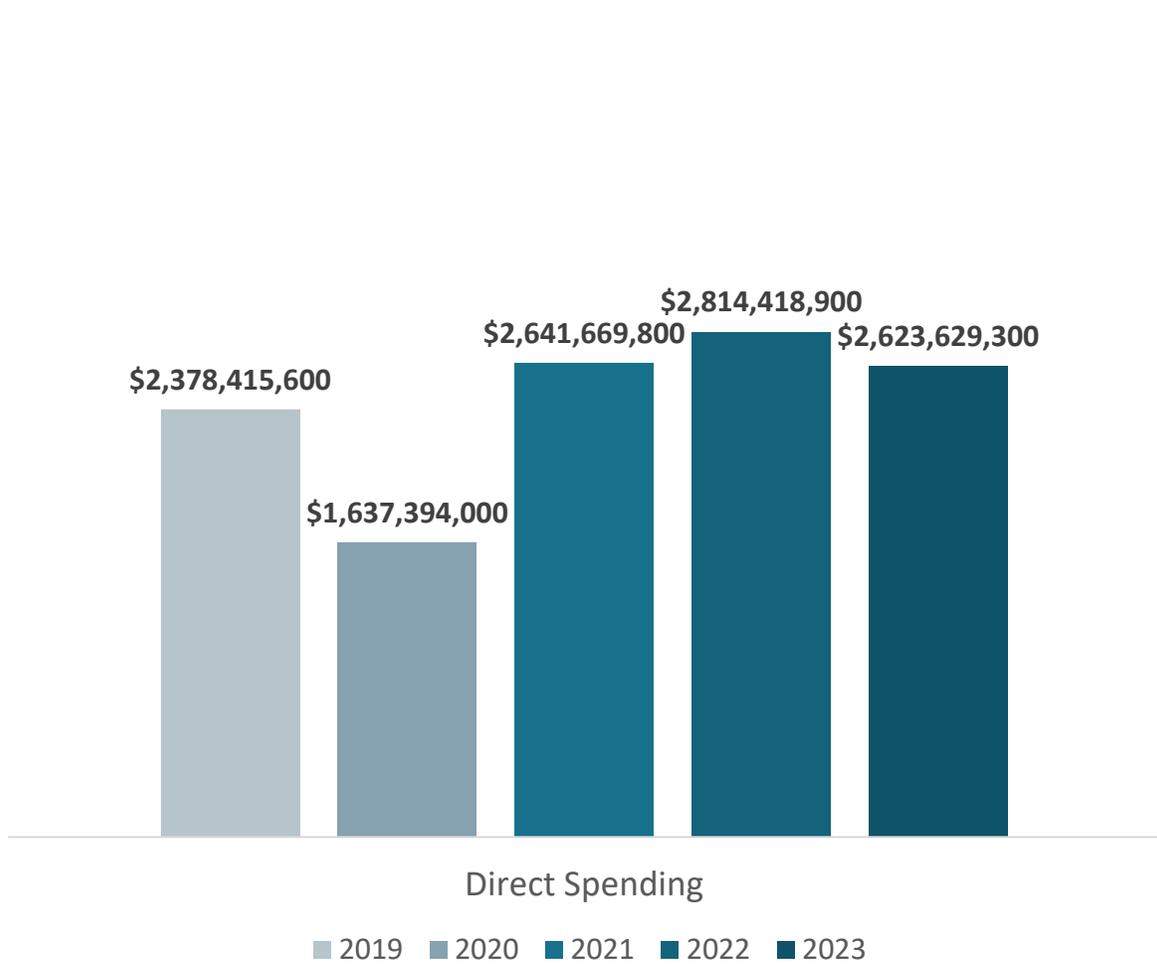
¹ Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

CY 2019-2023 VISITATION & ROOM NIGHTS¹



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

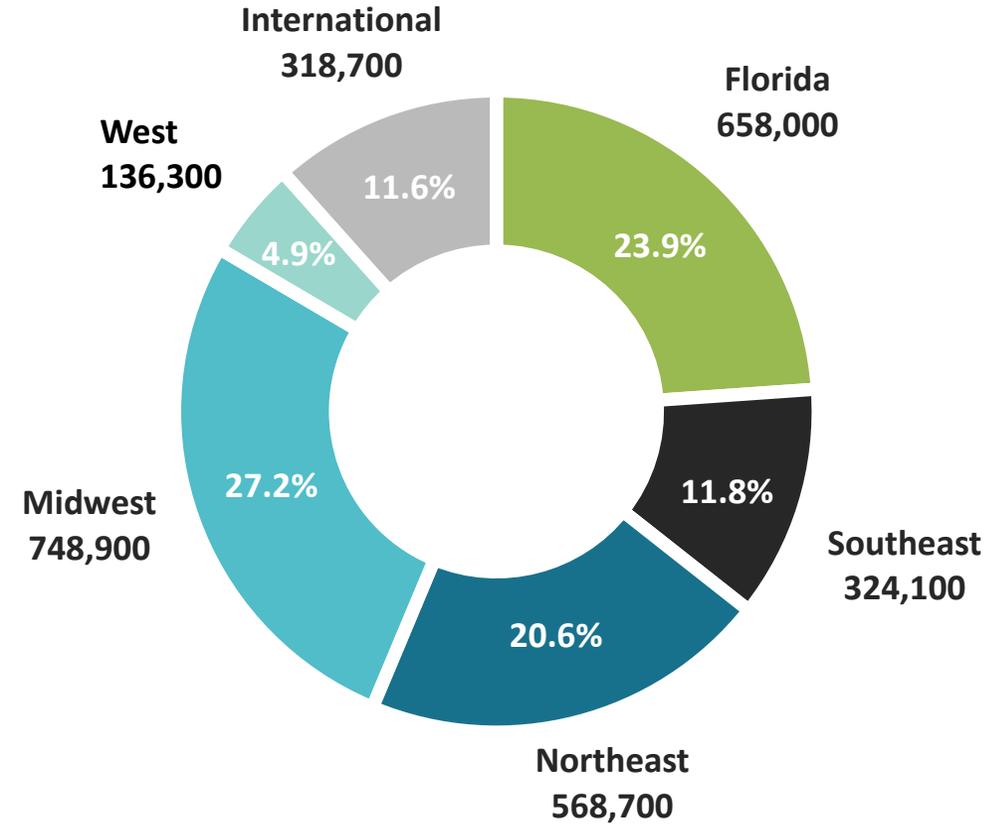
CY 2019-2023 SPENDING & ECONOMIC IMPACT¹

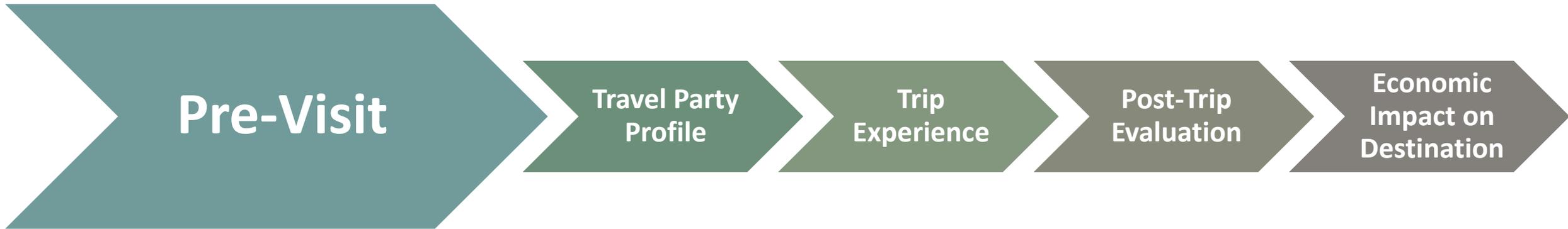


¹ Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

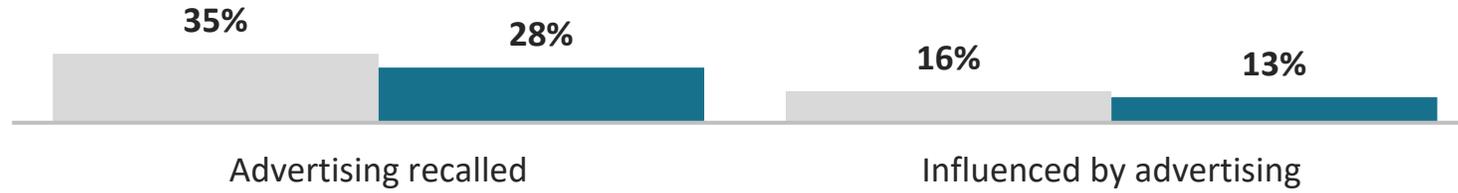
CY 2023 VISITOR ORIGIN MARKETS¹

Region	CY 2022		CY 2023		Percent Change (Δ%)	
	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	740,200	25.6%	658,000	23.9%	-11.1%	-6.5%
Southeast	341,600	11.8%	324,100	11.8%	-5.1%	-0.2%
Northeast	637,400	22.0%	568,700	20.6%	-10.8%	-6.1%
Midwest	794,100	27.4%	748,900	27.2%	-5.7%	-0.8%
West	153,600	5.3%	136,300	4.9%	-11.3%	-6.7%
Canada	78,900	2.7%	129,000	4.7%	63.5%	72.0%
Europe	93,100	3.2%	123,200	4.5%	32.3%	39.2%
C/S America	22,900	0.8%	34,700	1.3%	51.5%	59.4%
Other	35,800	1.2%	31,800	1.1%	-11.2%	-6.6%
Total	2,897,600	100.0%	2,754,700	100.0%		

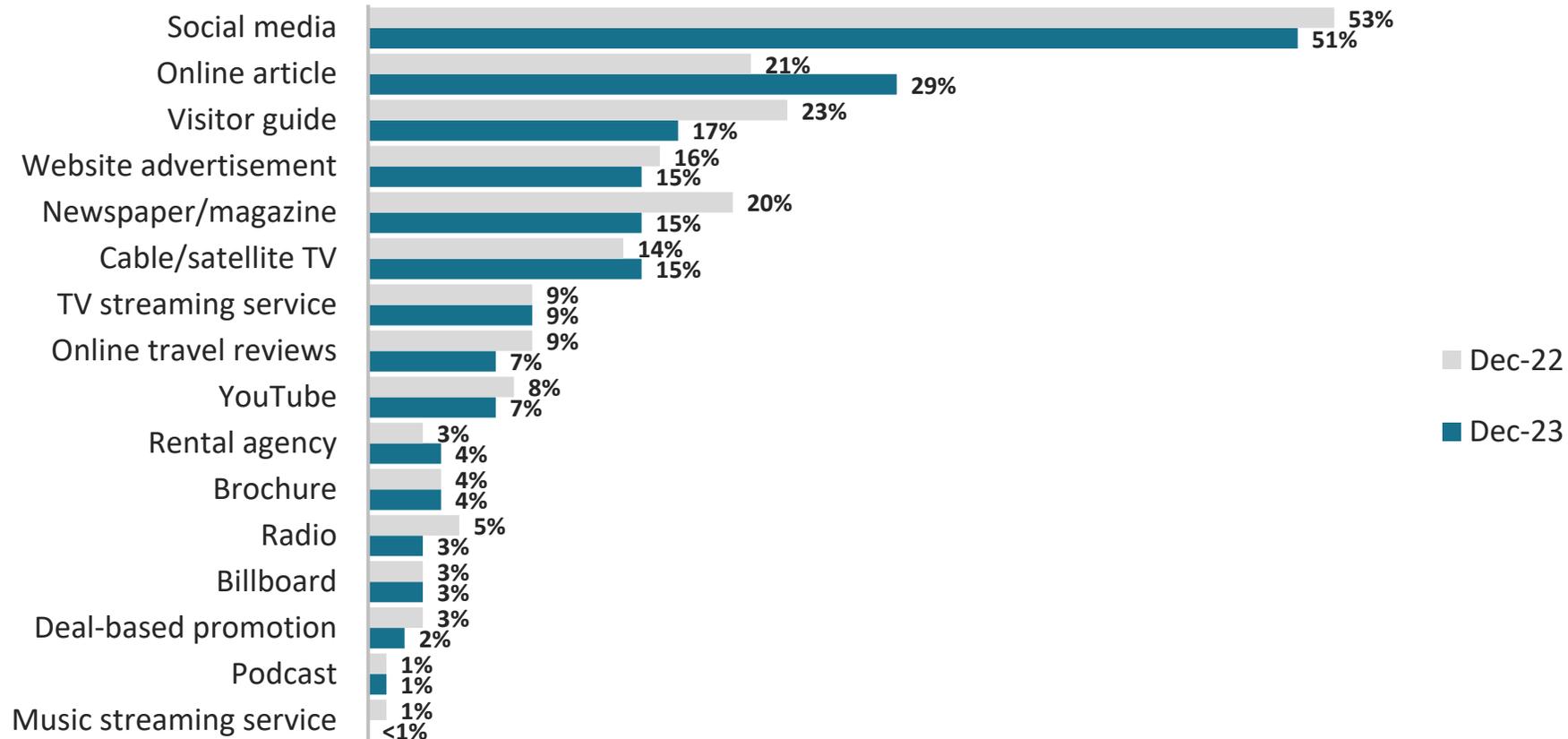




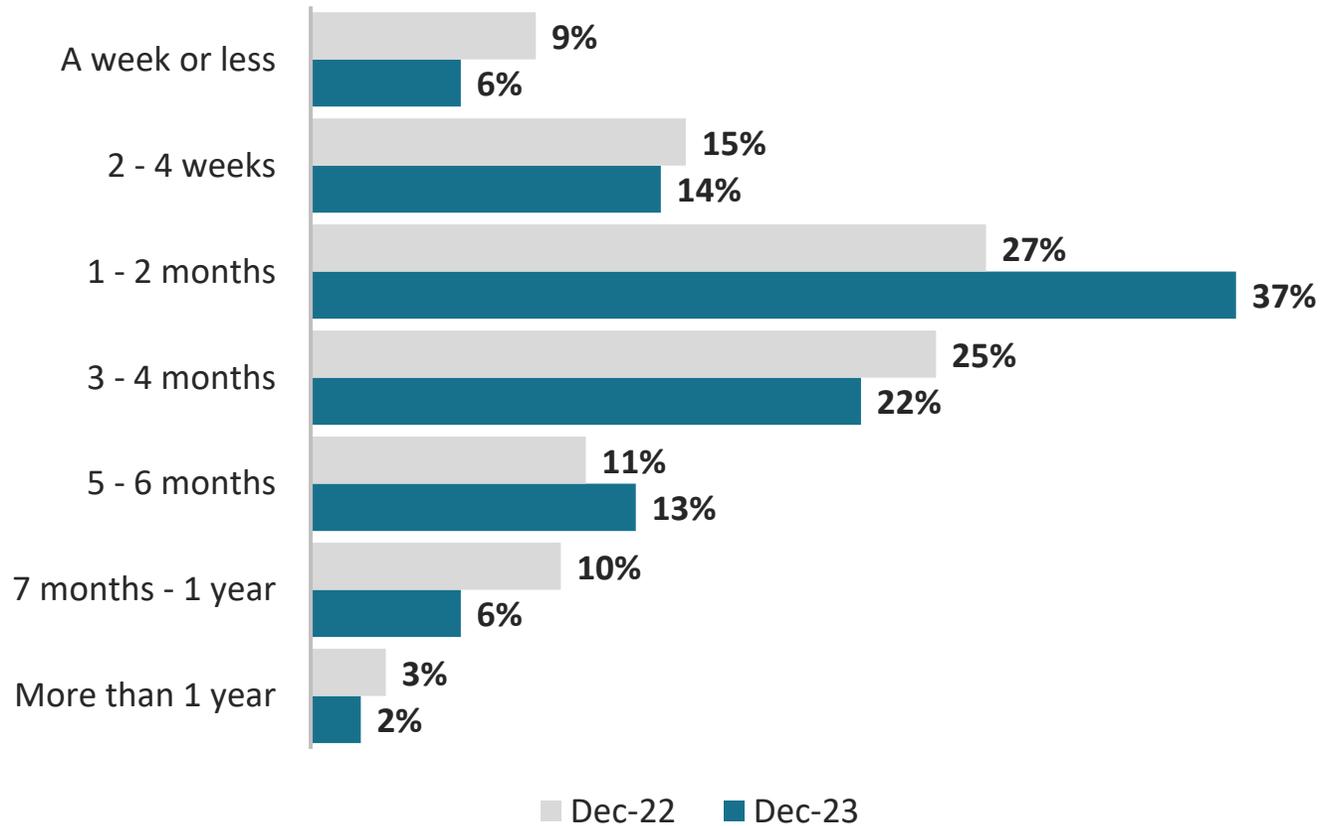
ADVERTISING RECALL¹



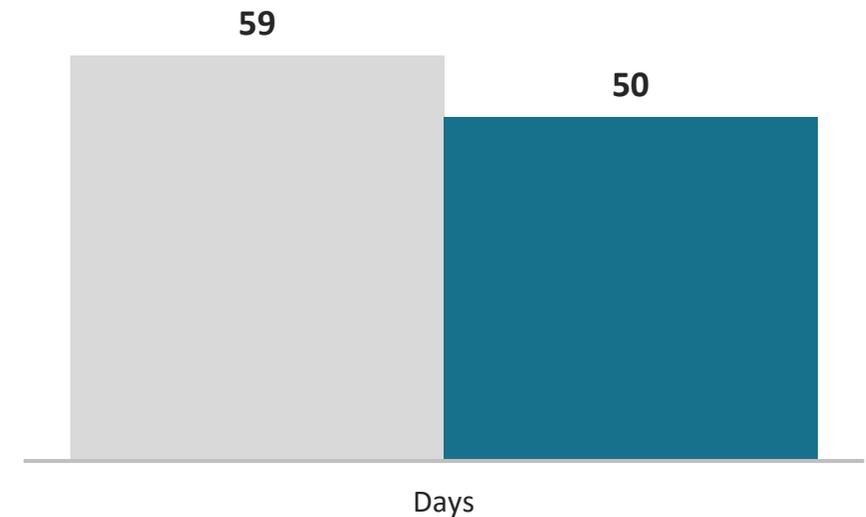
Base: % who recalled ads prior to their trip



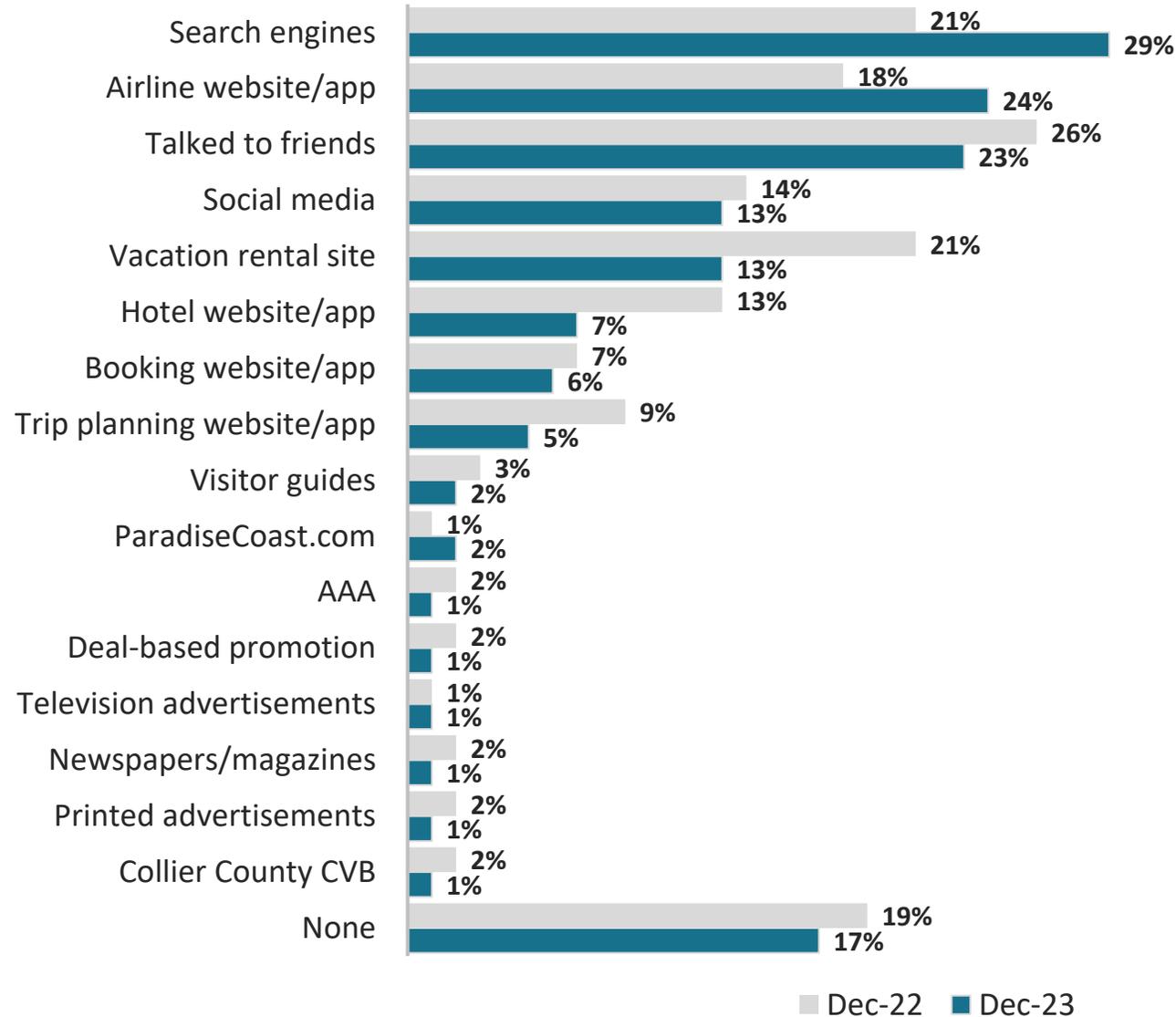
TRIP PLANNING CYCLE¹



Median Trip Planning Time

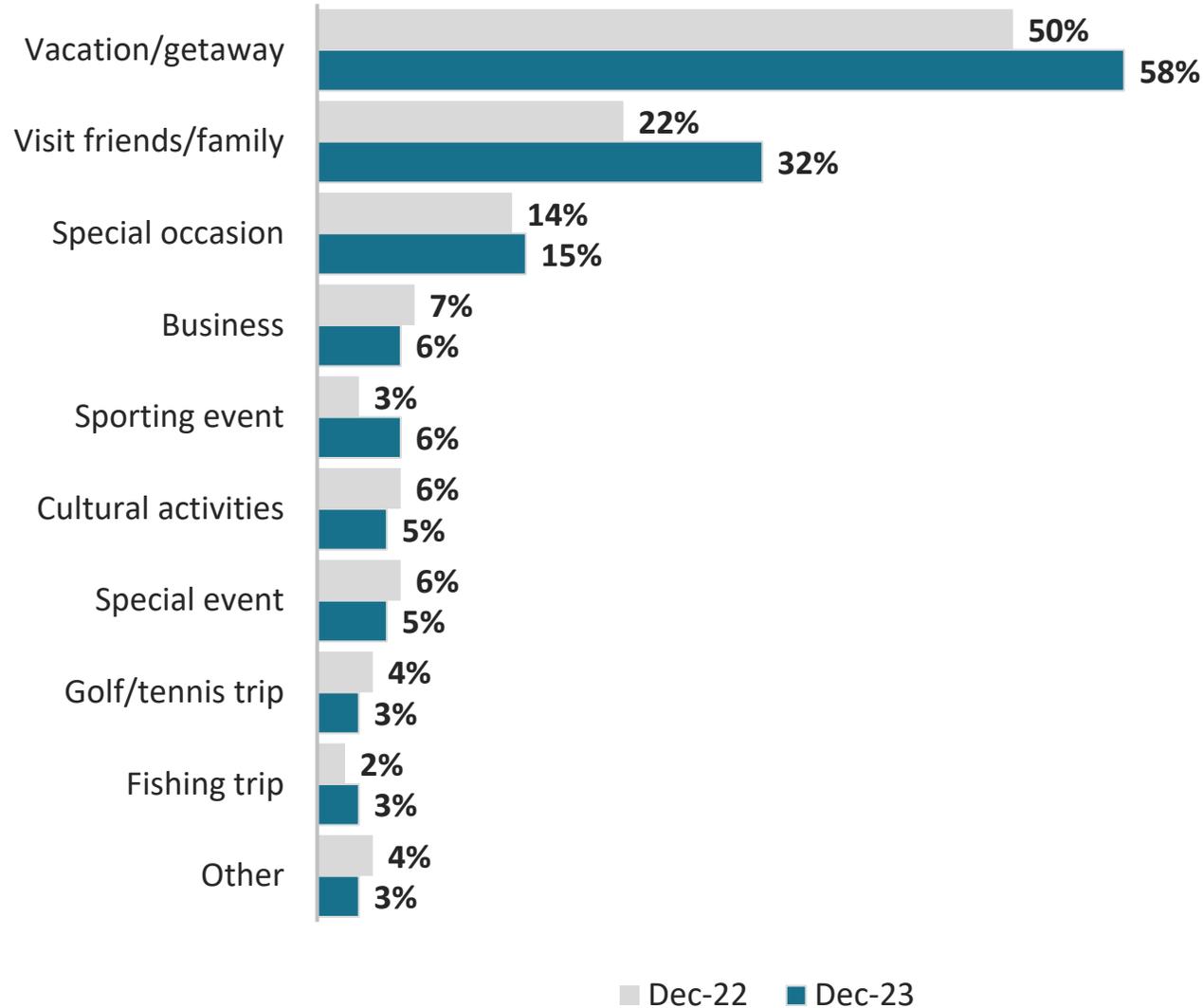


TRIP PLANNING SOURCES¹



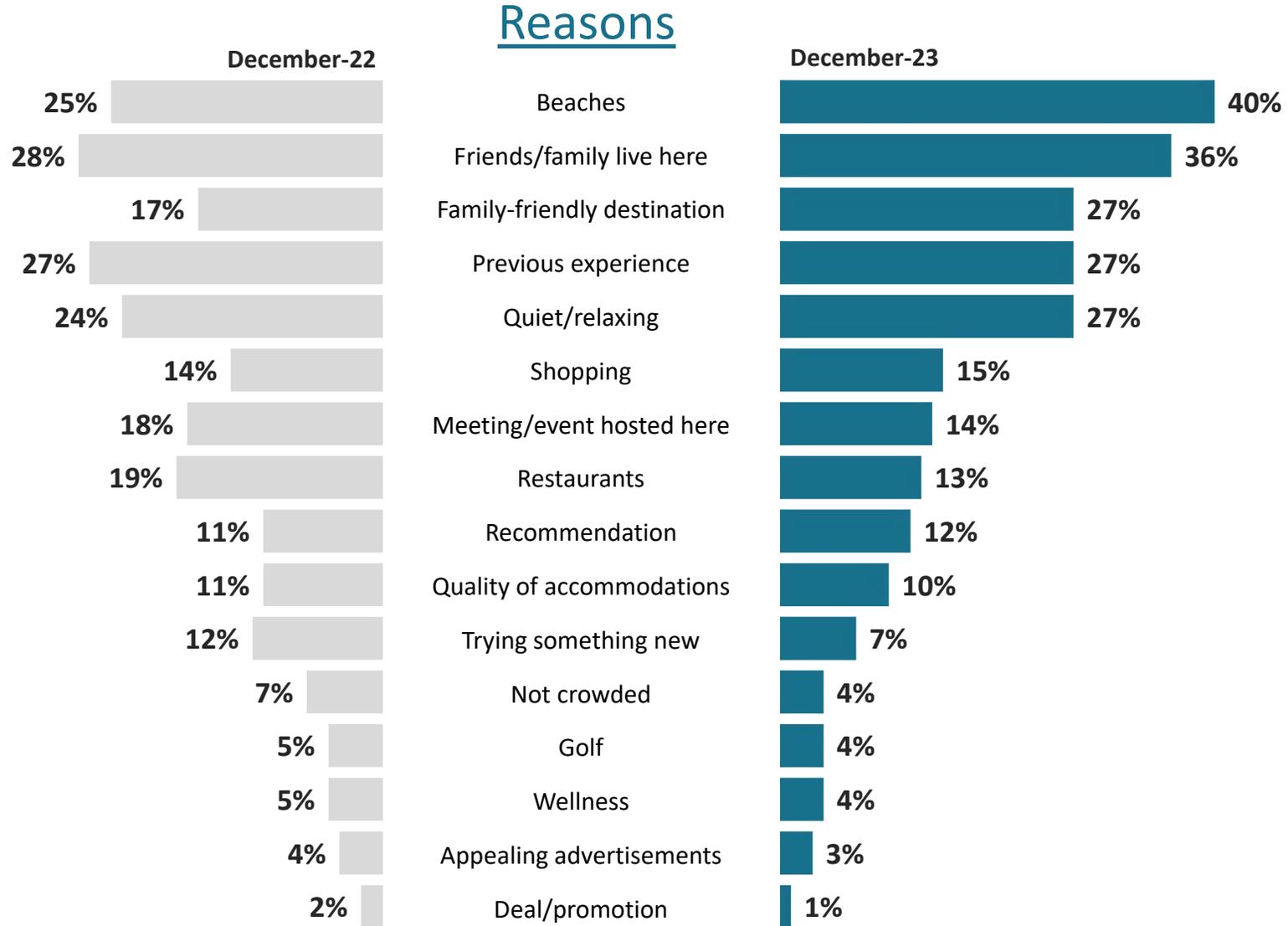
¹ Multiple responses permitted.

REASONS FOR VISITING¹



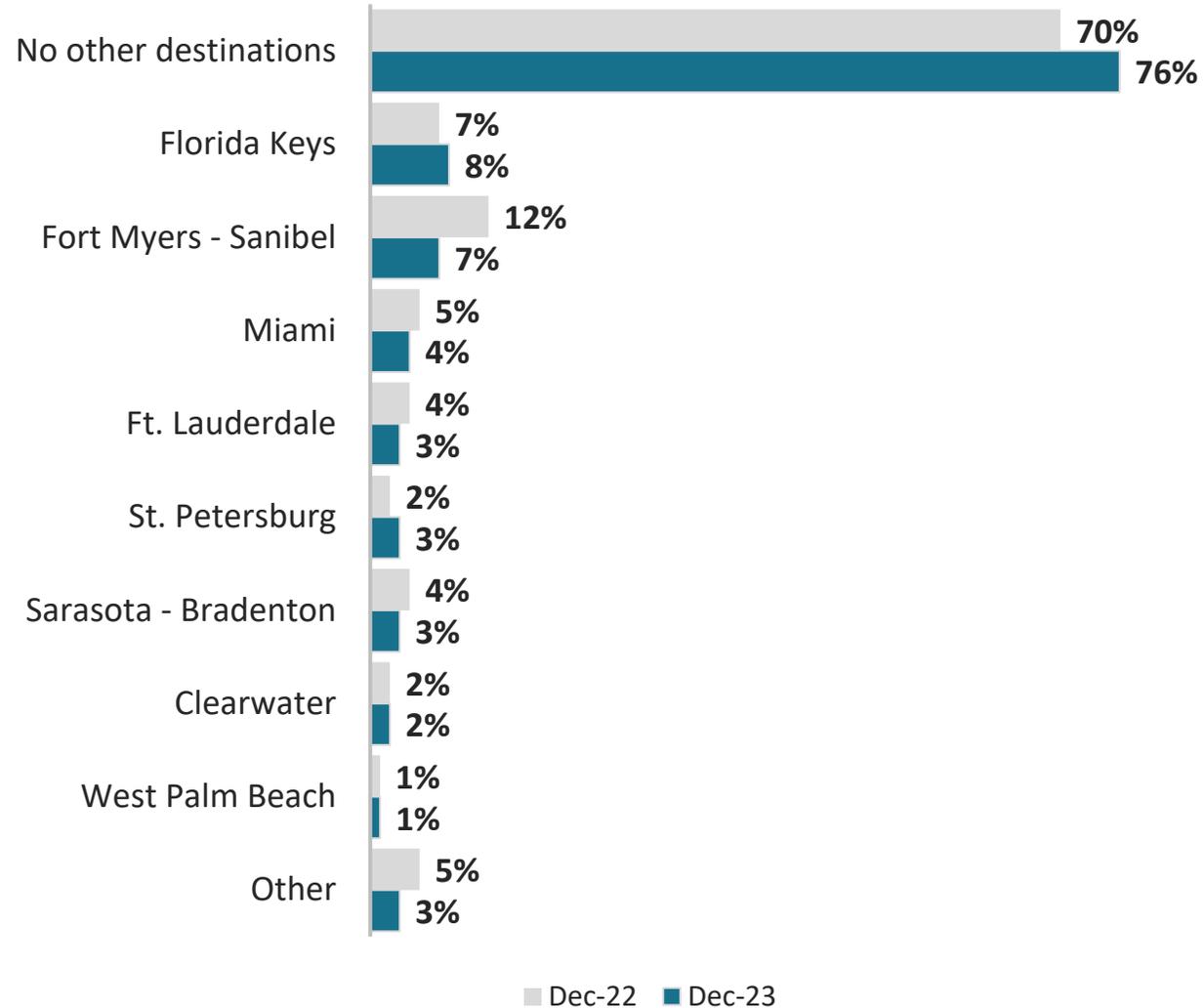
¹ Multiple responses permitted.

REASONS FOR CHOOSING AREA¹



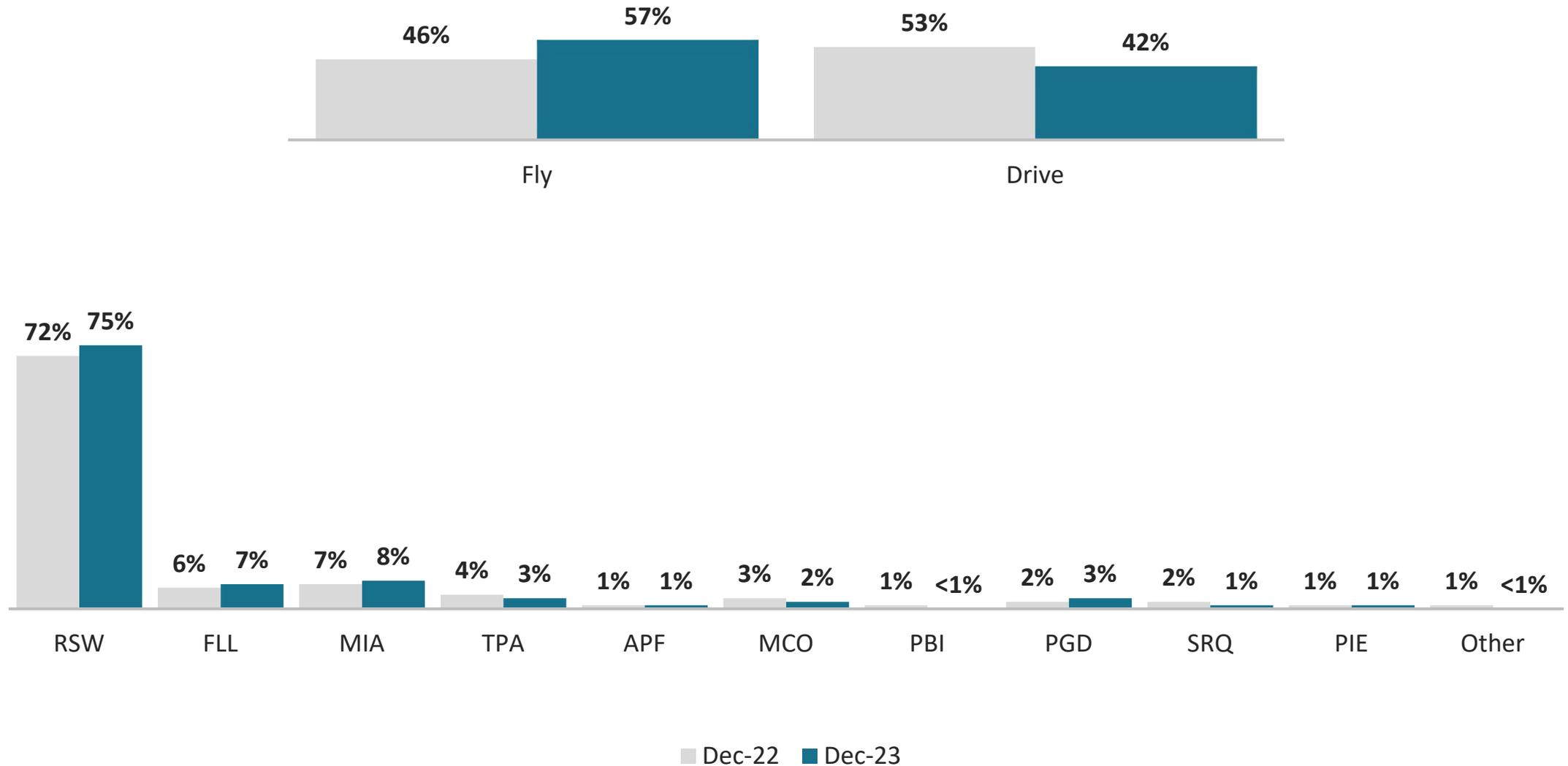
¹ Multiple responses permitted.

OTHER DESTINATIONS CONSIDERED¹

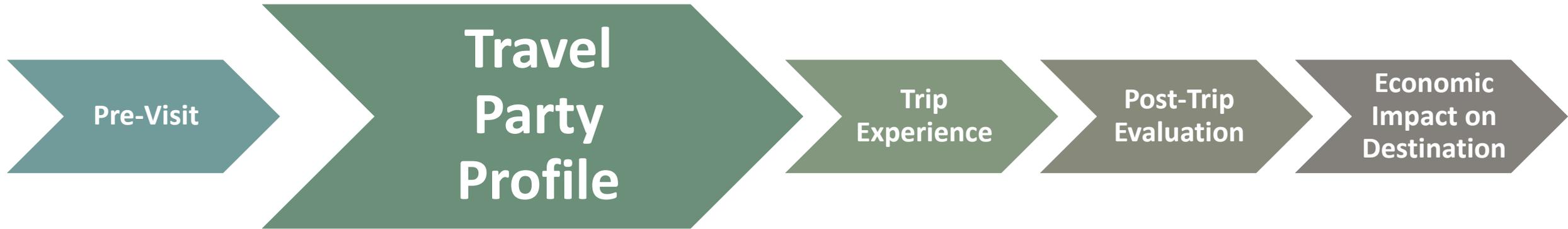


¹ Multiple responses permitted.

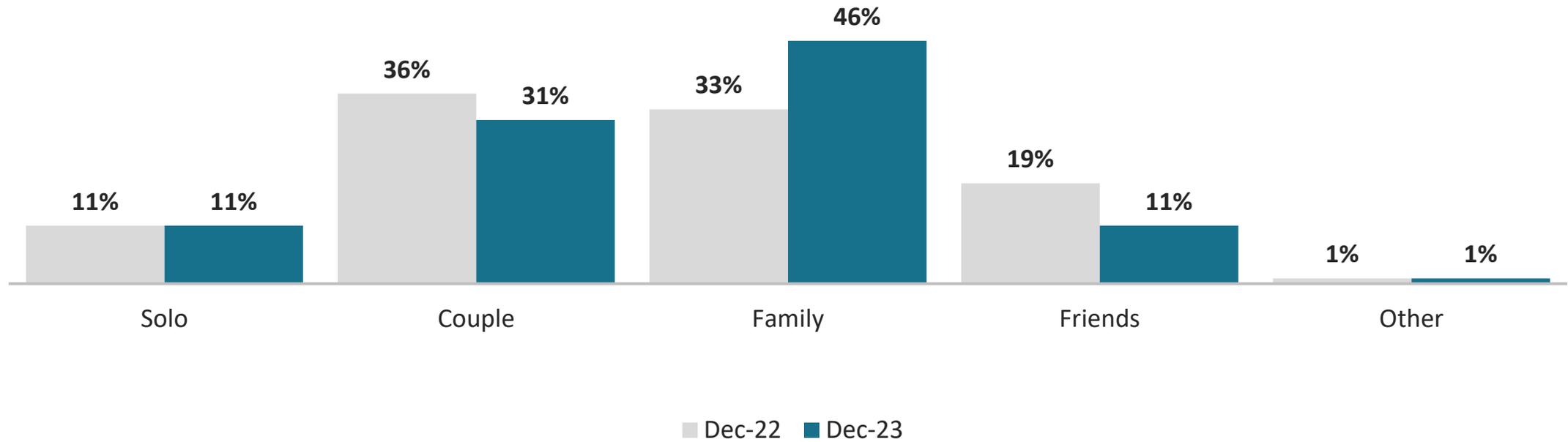
TRANSPORTATION METHODS



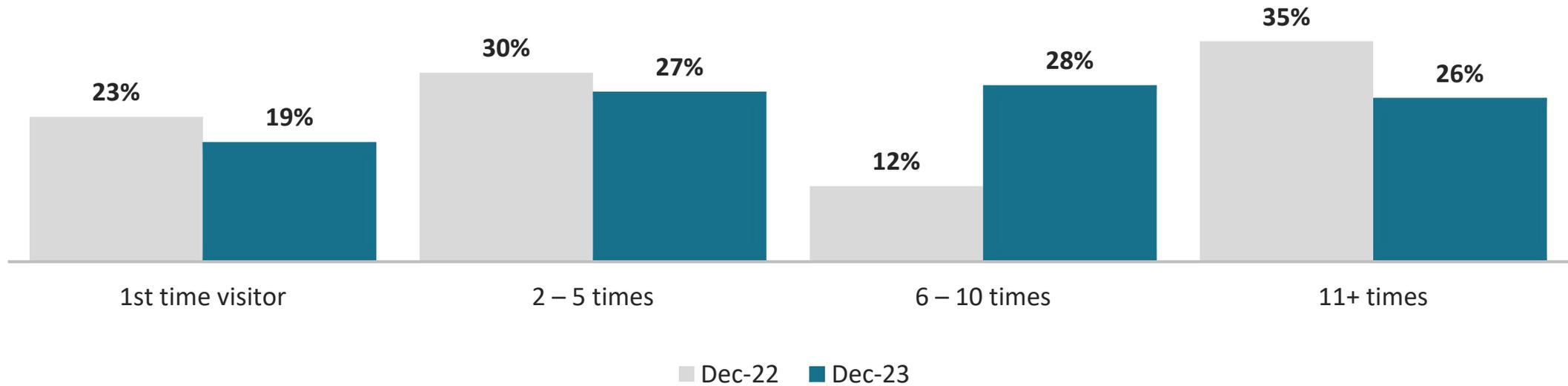
VISITOR JOURNEY: TRAVEL PARTY PROFILE



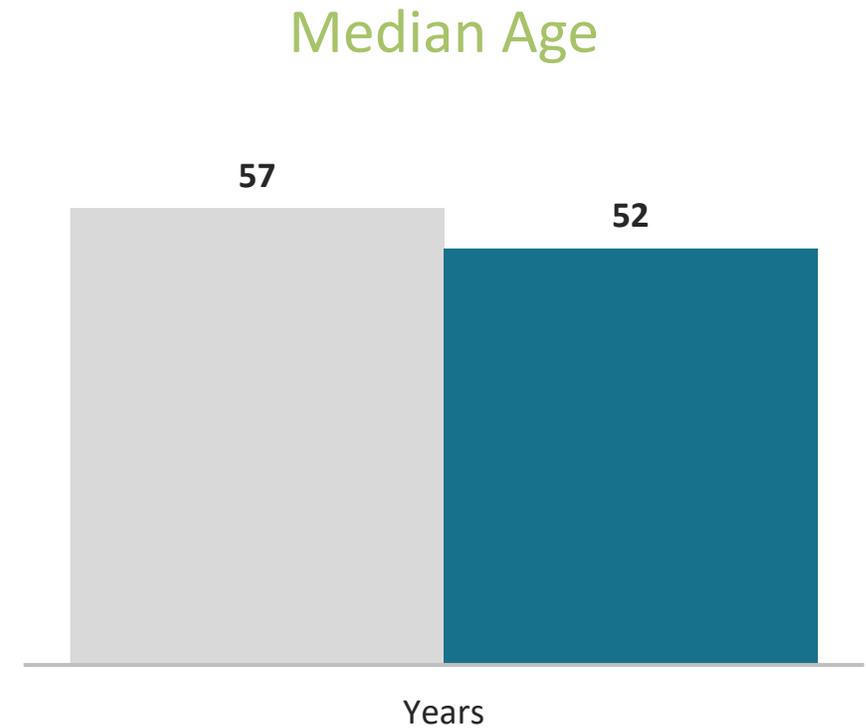
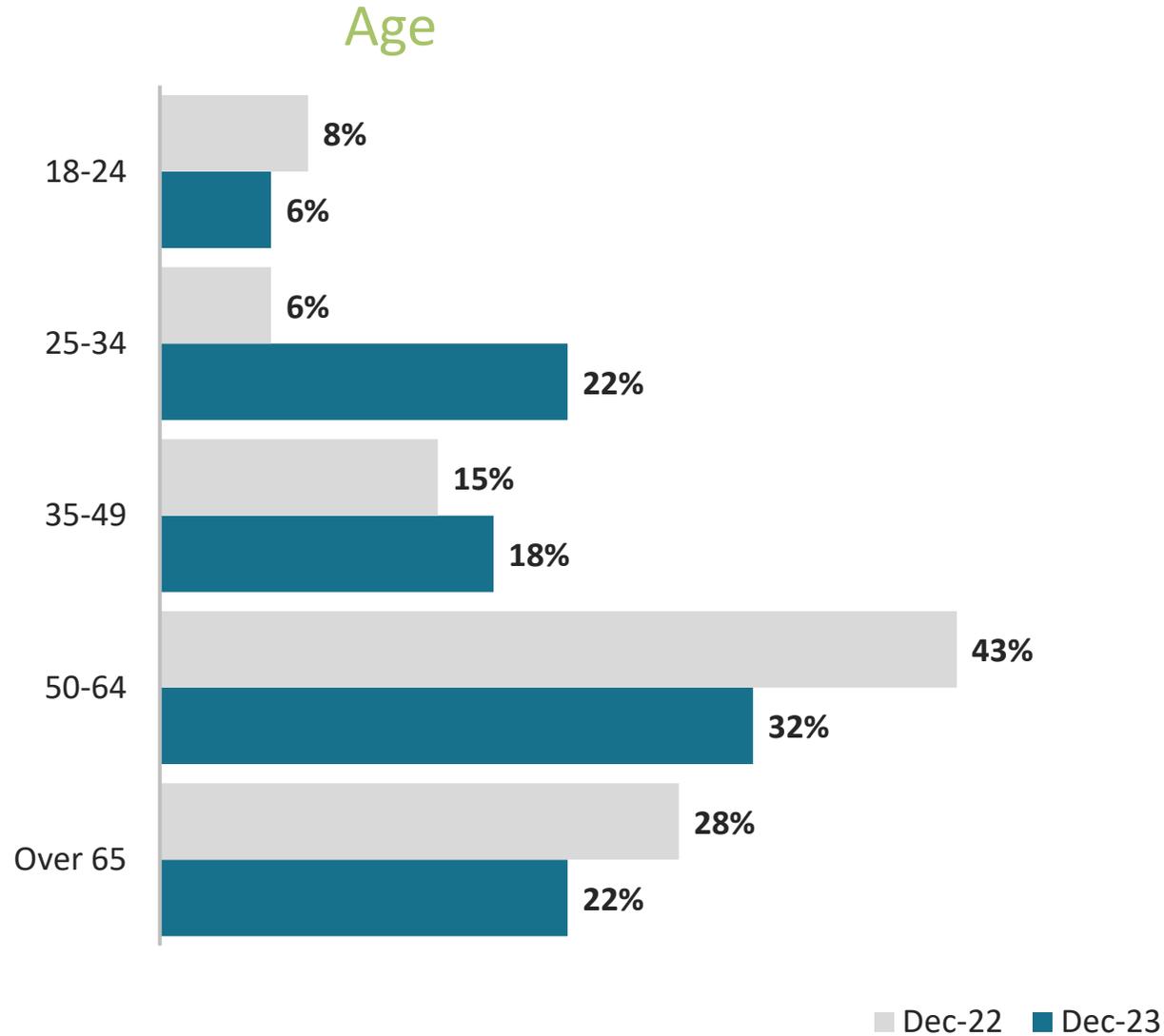
TRAVEL PARTY COMPOSITION



PREVIOUS VISITS

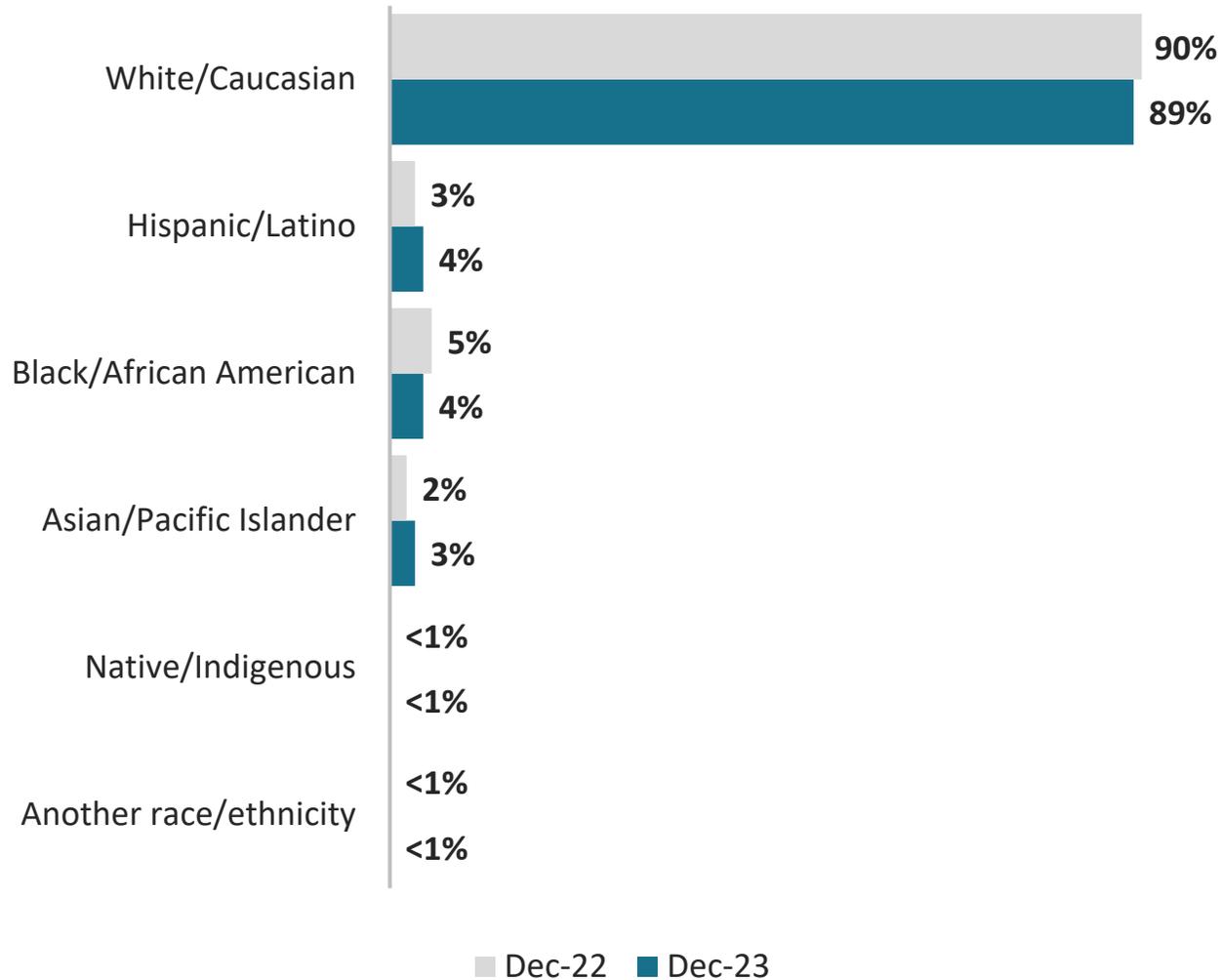


VISITOR AGES

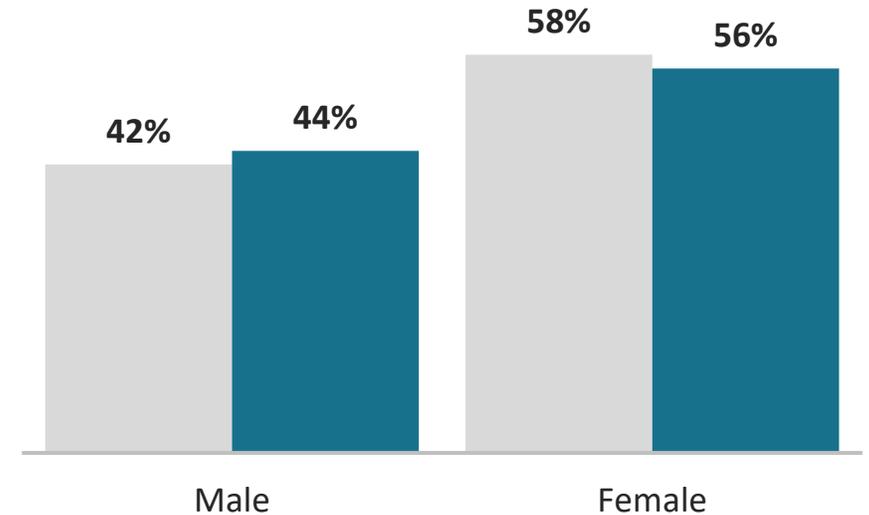


VISITOR RACE & GENDER¹

Race

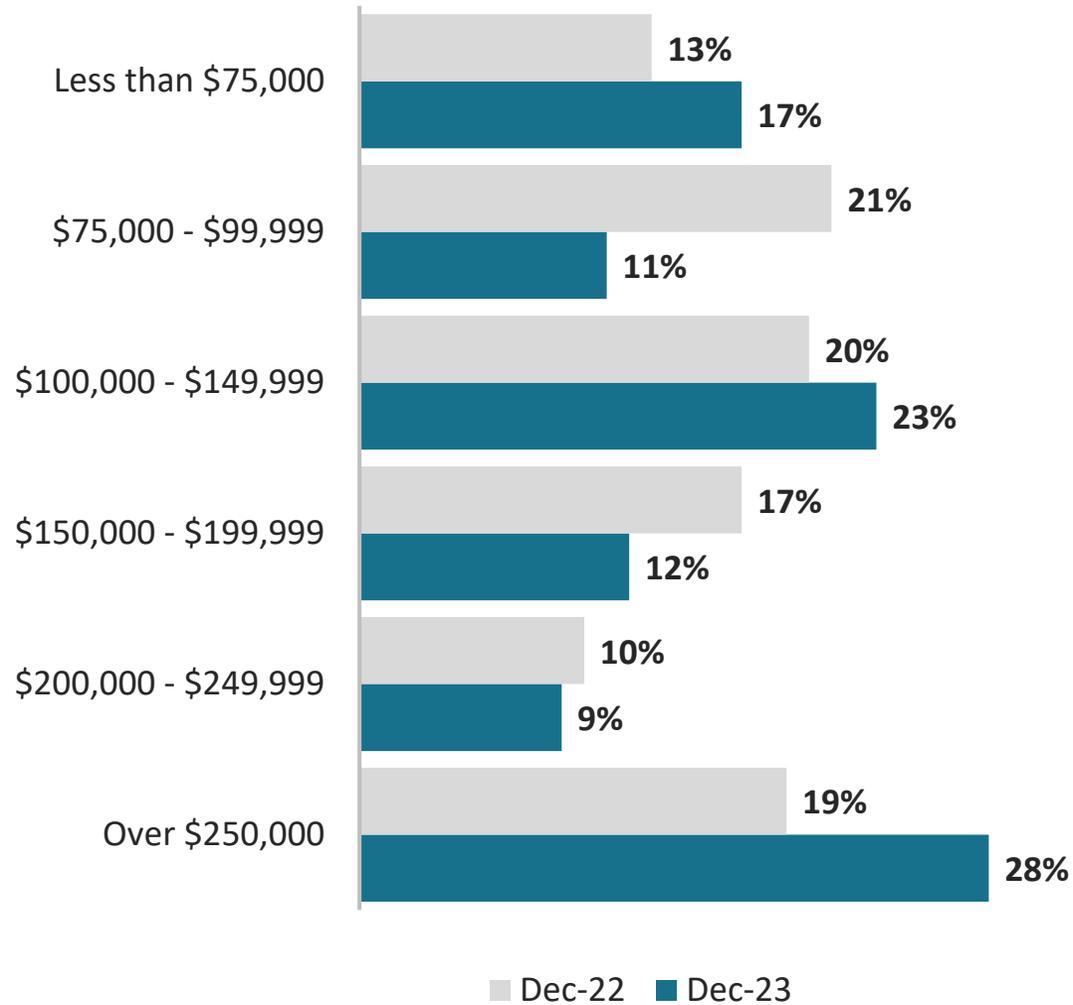


Gender

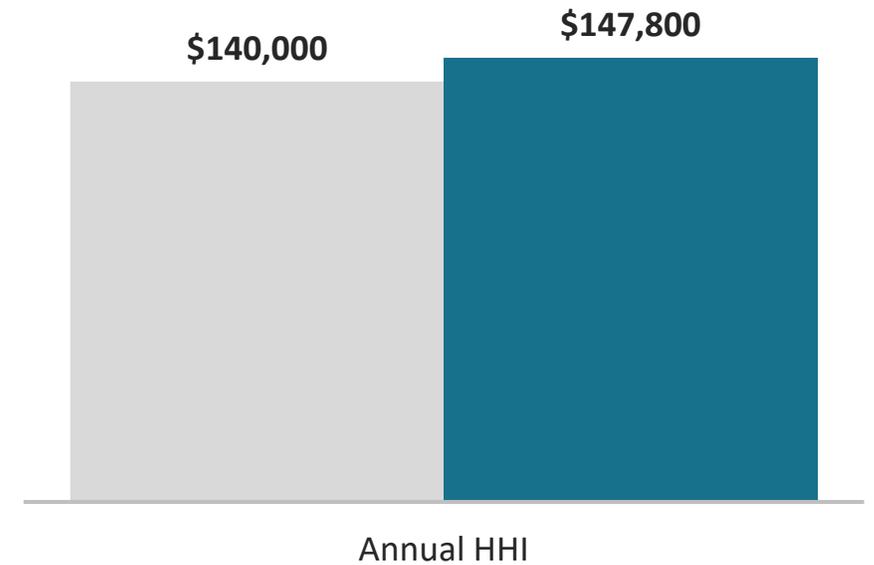


¹Of person interviewed. Females are generally more likely to agree to participate in survey research.

Income



Median Household Income



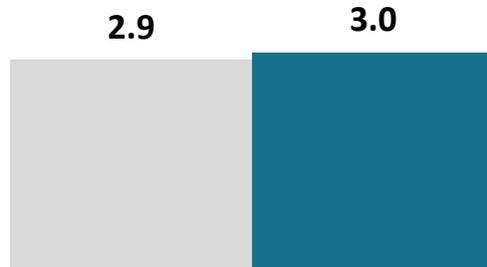
VISITOR JOURNEY: TRIP EXPERIENCE



TRIP CHARACTERISTICS

TRAVEL PARTY SIZE

3.0



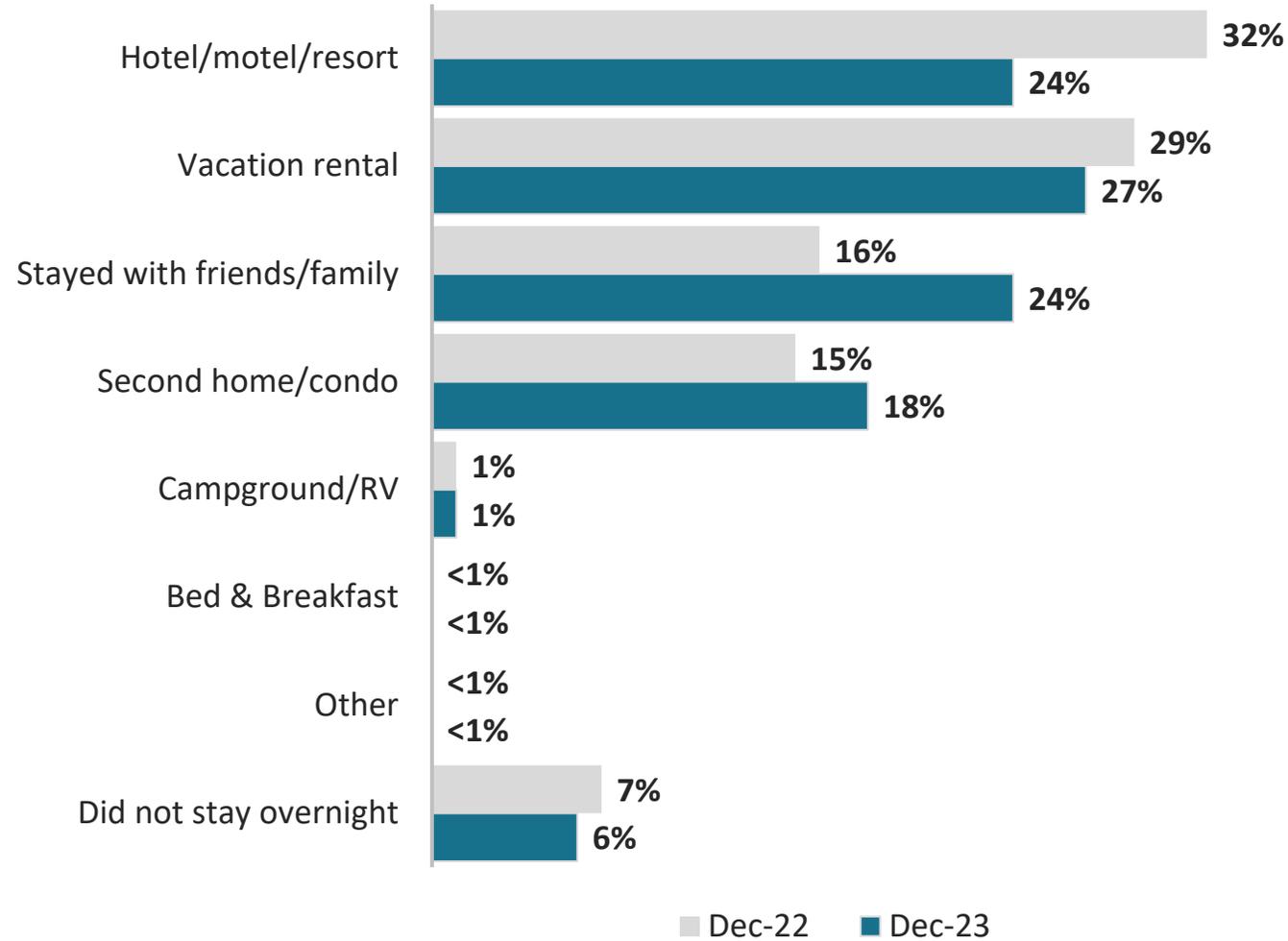
NIGHTS STAYED

6.6

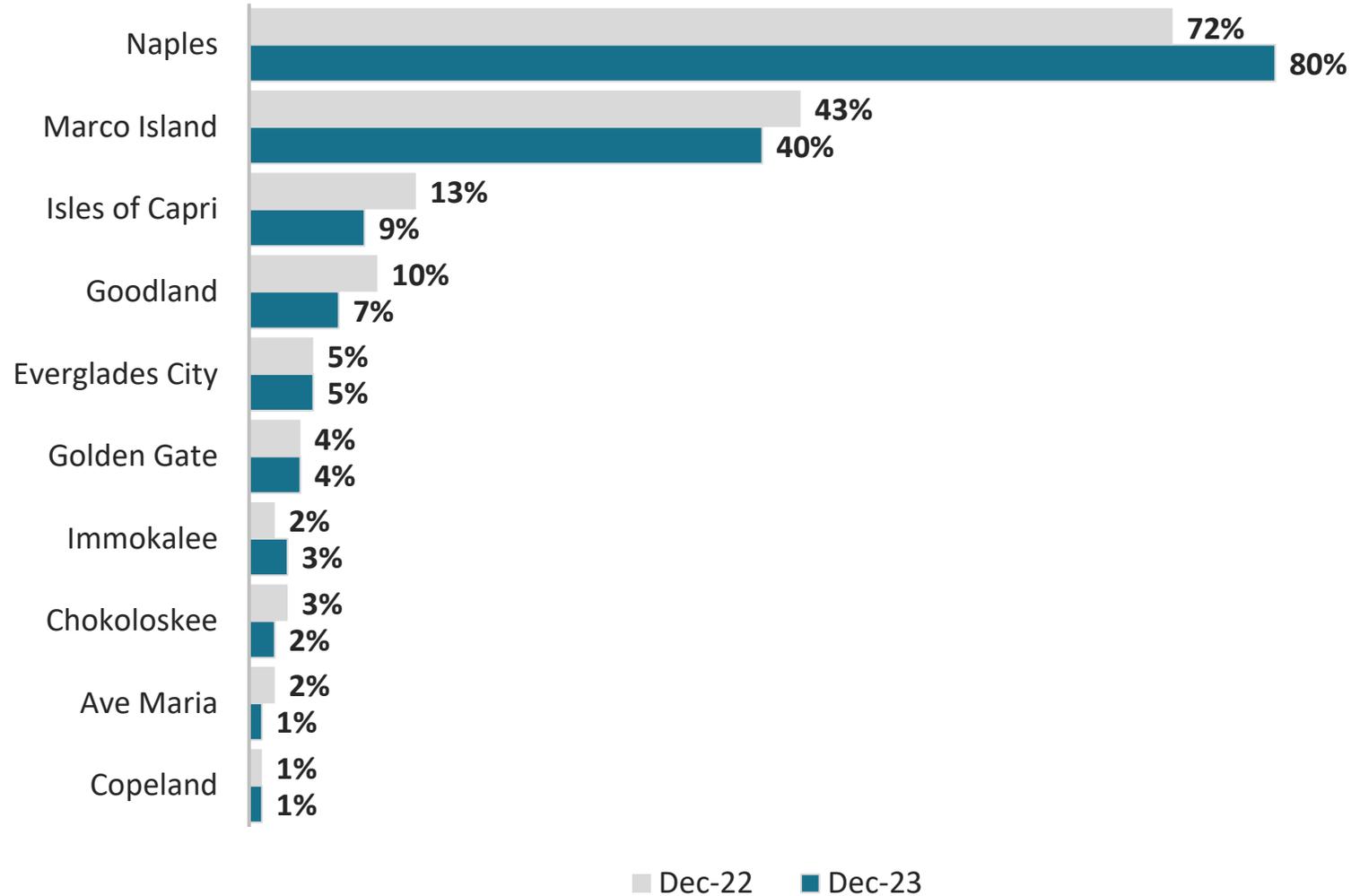


■ Dec-22 ■ Dec-23

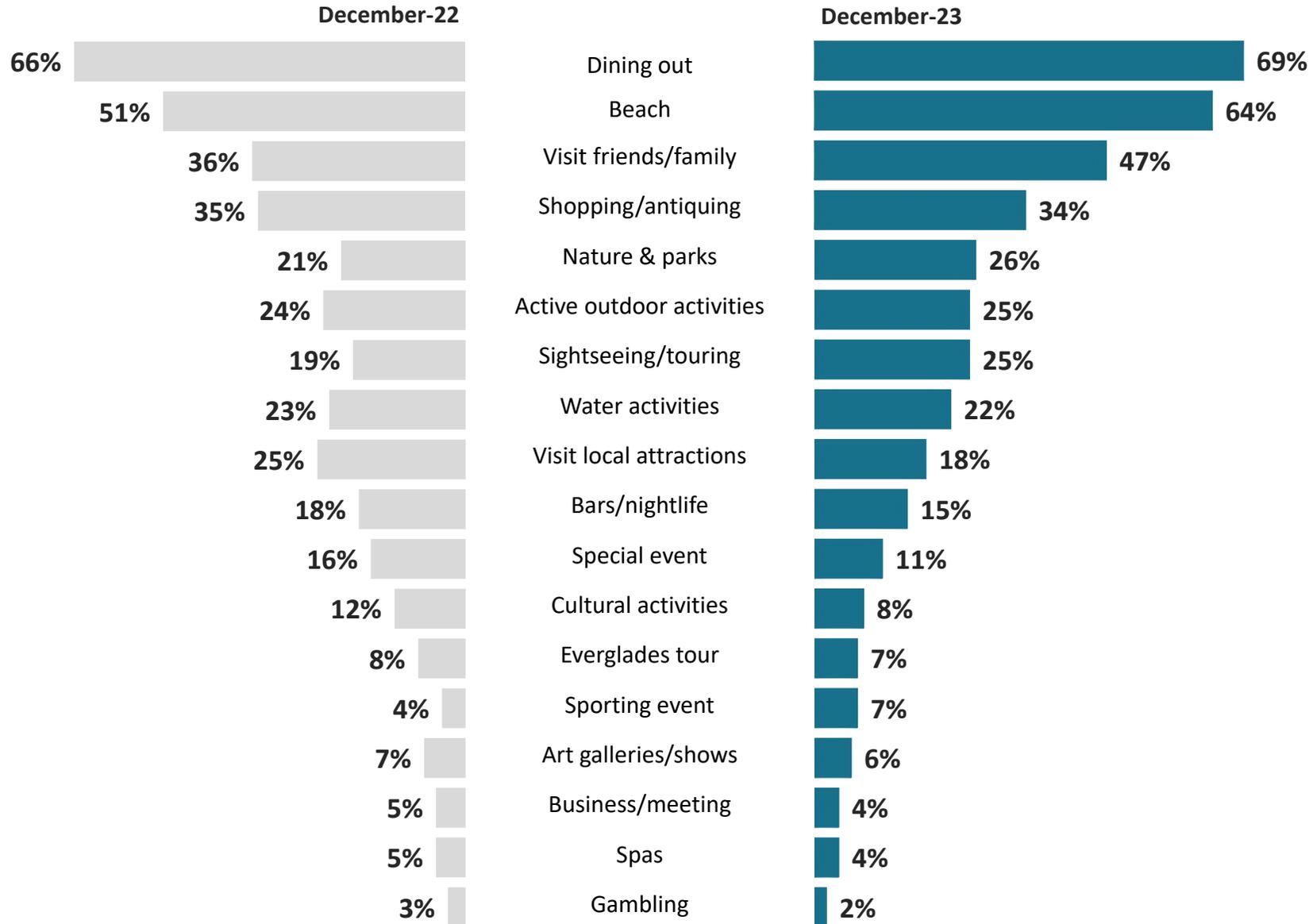
TYPE OF ACCOMMODATIONS



AREAS VISITED

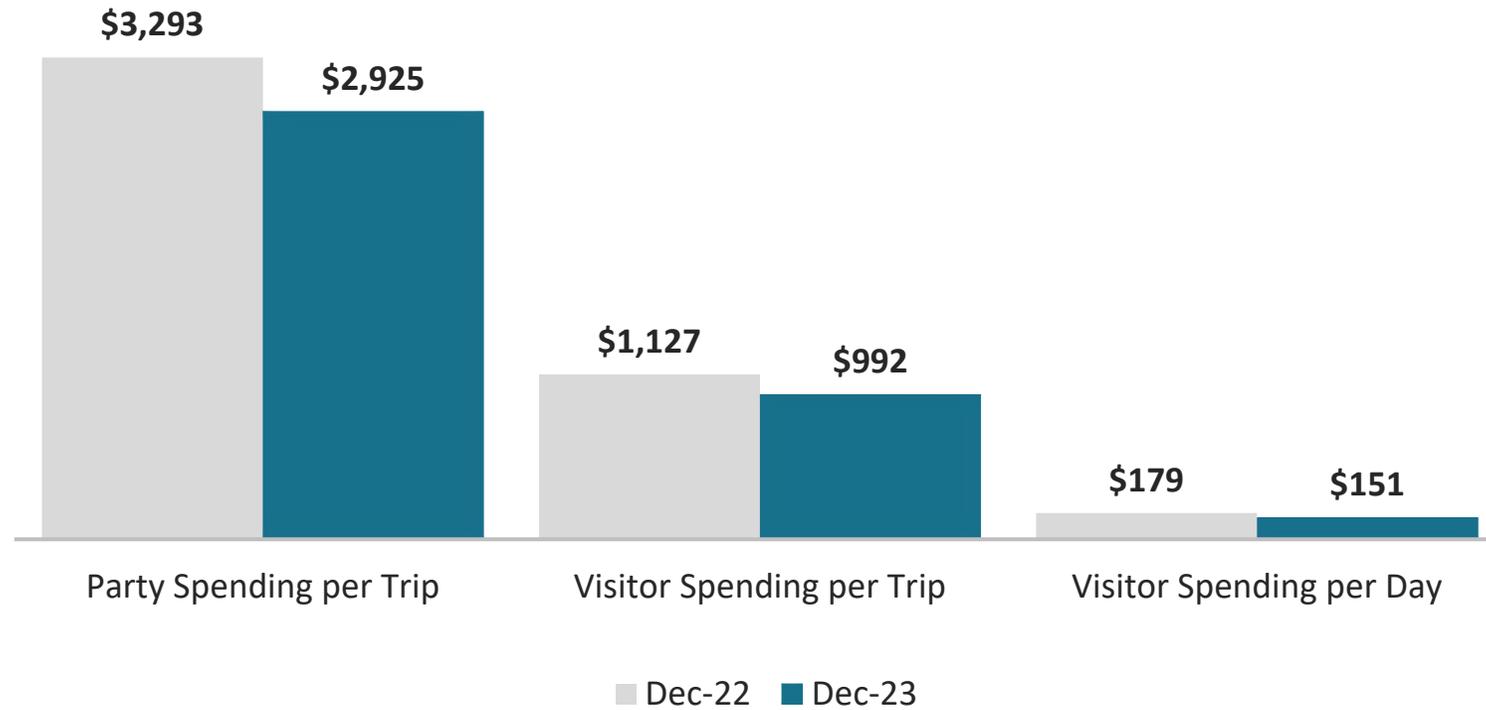


TRIP ACTIVITIES



¹ Multiple responses permitted.

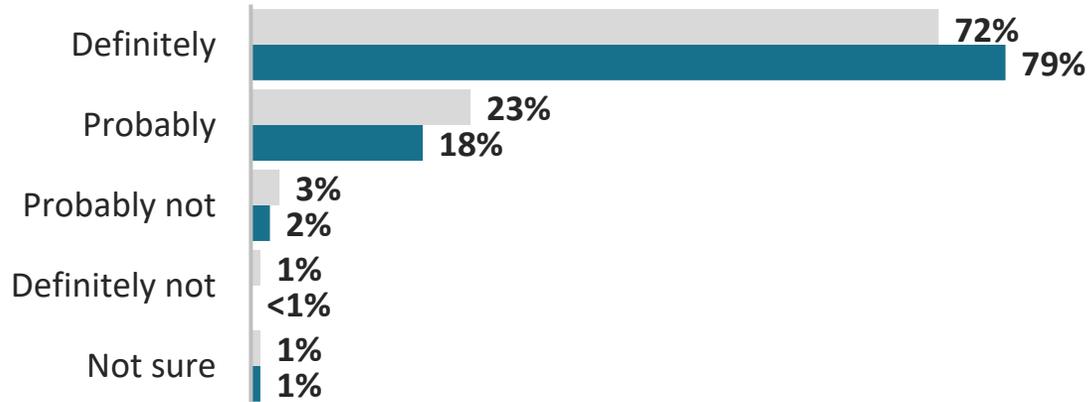
VISITOR SPENDING



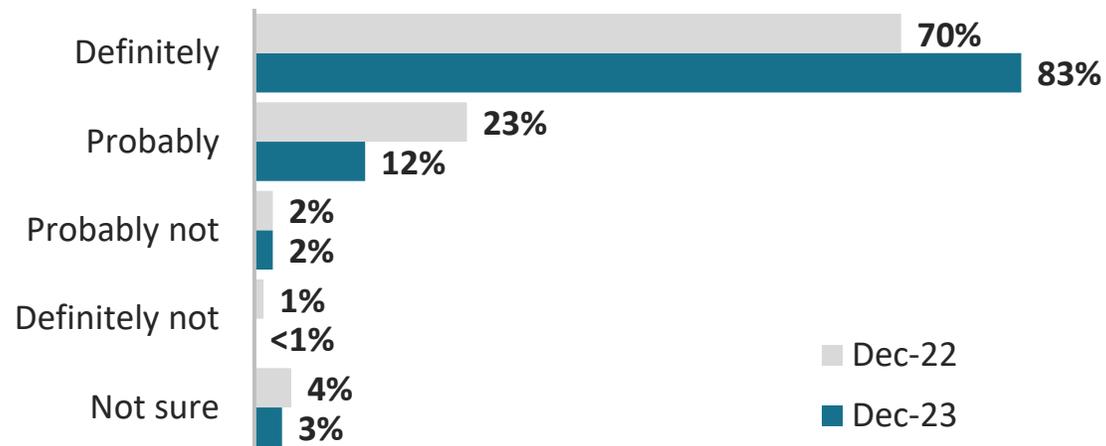
VISITOR JOURNEY: POST-TRIP EVALUATION



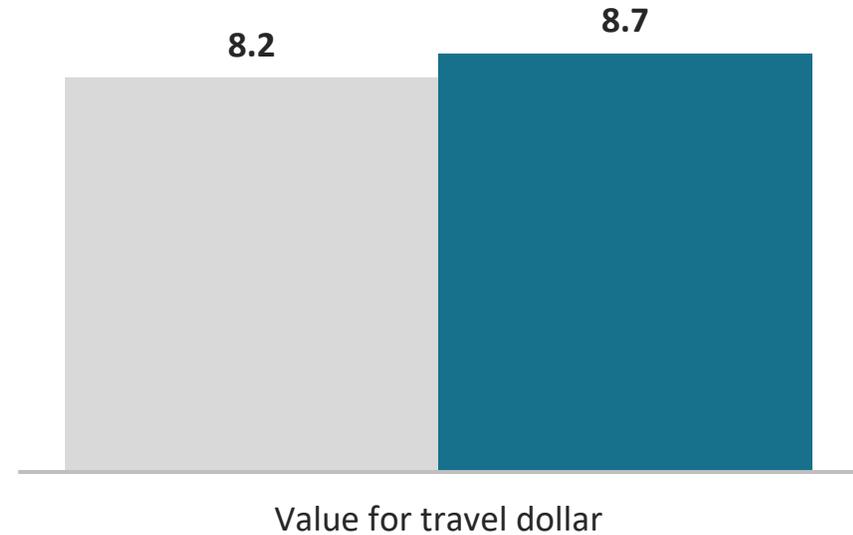
Will recommend the Naples area?



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.

NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau
December 2023 Monthly Dashboard



DESTINATION COMPARISONS



OCCUPANCY COMPARISONS

	Occupancy Rate (%)				Δ% from Dec 2019				Δ% from Dec 2022			
	Trans	Group	Cont	Total	Trans	Group	Cont	Total	Trans	Group	Cont	Total
Naples	47.7%	14.5%	0.1%	62.3%	-1.1%	-20.9%	-16.8%	-6.6%	-6.1%	-20.3%	+1190.6%	-9.6%
Miami	62.9%	8.2%	4.3%	75.3%	-1.6%	-18.9%	+7.5%	-3.4%	+7.7%	-9.4%	-3.4%	+4.9%
Florida Keys	65.5%	8.2%	0.2%	73.9%	+0.8%	+41.6%	-42.4%	+3.9%	+2.0%	-0.3%	-29.9%	+1.6%
Fort Myers	48.9%	8.4%	6.1%	63.4%	-8.5%	-14.2%	+49.9%	-5.8%	+2.9%	-58.8%	+30.9%	-12.6%
Sarasota	48.5%	10.5%	4.0%	63.0%	+4.0%	-52.3%	+294.9%	-9.6%	-13.2%	+0.8%	+325.9%	-6.4%
Clearwater	48.7%	11.5%	0.0%	60.1%	-8.4%	-3.8%	-100.0%	-7.7%	-5.1%	-23.1%	0.0%	-9.2%
St. Petersburg	46.7%	10.8%	0.8%	58.2%	-5.0%	-12.5%	-30.3%	-6.9%	-5.8%	-9.1%	-5.9%	-6.4%
Palm Beach	56.4%	10.0%	1.7%	68.1%	-0.8%	-41.6%	-12.4%	-10.3%	-0.9%	-2.3%	+2.8%	-1.0%
Ft. Lauderdale	61.8%	10.2%	2.6%	74.6%	+0.6%	-10.3%	-45.2%	-3.8%	+6.1%	+8.0%	-13.2%	+5.5%

¹Metrics provided by STR.

ROOM RATE COMPARISONS

	Average Daily Rate (\$)				Δ% from Dec 2019				Δ% from Dec 2022			
	Trans	Group	Cont	Total	Trans	Group	Cont	Total	Trans	Group	Cont	Total
Naples	\$390.45	\$231.96	\$172.40	\$353.15	+31.4%	+35.1%	+68.2%	+34.7%	+21.9%	+19.7%	+44.1%	+23.1%
Miami	\$279.40	\$260.16	\$118.30	\$268.22	+15.1%	+26.2%	+24.0%	+16.4%	-0.5%	+12.0%	+13.6%	+1.6%
Florida Keys	\$409.91	\$348.67	\$386.61	\$403.08	+29.5%	+49.1%	+131.8%	+30.5%	+0.1%	+1.6%	-14.2%	+0.3%
Fort Myers	\$158.78	\$164.64	\$126.87	\$156.50	+2.6%	+52.3%	+58.9%	+9.1%	-17.8%	-9.4%	+17.2%	-15.2%
Sarasota	\$196.70	\$169.22	\$111.43	\$186.75	+34.4%	+48.5%	+63.4%	+38.4%	-0.7%	+2.7%	+15.8%	-2.5%
Clearwater	\$167.23	\$173.70	\$0.00	\$168.46	+22.0%	+48.7%	-100.0%	+26.4%	-4.1%	+8.1%	0.0%	-1.7%
St. Petersburg	\$170.49	\$155.03	\$84.82	\$166.47	+25.0%	+34.7%	-22.1%	+26.4%	-2.4%	+3.8%	-12.8%	-1.4%
Palm Beach	\$294.13	\$252.18	\$95.19	\$283.03	+28.8%	+54.3%	-15.5%	+34.3%	-1.7%	+3.6%	+13.5%	-0.9%
Ft. Lauderdale	\$194.61	\$192.55	\$124.24	\$191.86	+19.2%	+23.3%	+8.5%	+20.5%	-2.5%	0.0%	+5.9%	-1.7%

¹Metrics provided by STR.

ROOM REVENUE COMPARISONS

	Revenue per Available Room (\$)				Δ% from Dec 2019				Δ% from Dec 2022			
	Trans	Group	Cont	Total	Trans	Group	Cont	Total	Trans	Group	Cont	Total
Naples	\$186.27	\$33.60	\$0.23	\$220.11	+30.0%	+6.9%	+39.9%	+25.8%	+14.5%	-4.5%	+1759.1%	+11.3%
Miami	\$175.72	\$21.27	\$5.03	\$202.02	+13.2%	+2.4%	+33.3%	+12.4%	+7.2%	+1.6%	+9.7%	+6.6%
Florida Keys	\$268.61	\$28.43	\$0.79	\$297.83	+30.6%	+111.0%	+33.5%	+35.6%	+2.1%	+1.3%	-39.8%	+1.8%
Fort Myers	\$77.67	\$13.81	\$7.71	\$99.18	-6.1%	+30.7%	+138.1%	+2.7%	-15.4%	-62.6%	+53.4%	-25.9%
Sarasota	\$95.39	\$17.81	\$4.41	\$117.62	+39.8%	-29.1%	+545.2%	+25.1%	-13.8%	+3.5%	+393.2%	-8.7%
Clearwater	\$81.36	\$19.92	\$0.00	\$101.29	+11.8%	+43.0%	-100.0%	+16.7%	-9.0%	-16.9%	0.0%	-10.7%
St. Petersburg	\$79.57	\$16.70	\$0.67	\$96.94	+18.8%	+17.8%	-45.7%	+17.7%	-8.1%	-5.7%	-17.9%	-7.8%
Palm Beach	\$165.96	\$25.21	\$1.61	\$192.78	+27.8%	-9.9%	-26.0%	+20.4%	-2.6%	+1.2%	+16.6%	-1.9%
Ft. Lauderdale	\$120.22	\$19.62	\$3.25	\$143.10	+20.0%	+10.6%	-40.5%	+15.9%	+3.4%	+8.0%	-8.0%	+3.7%

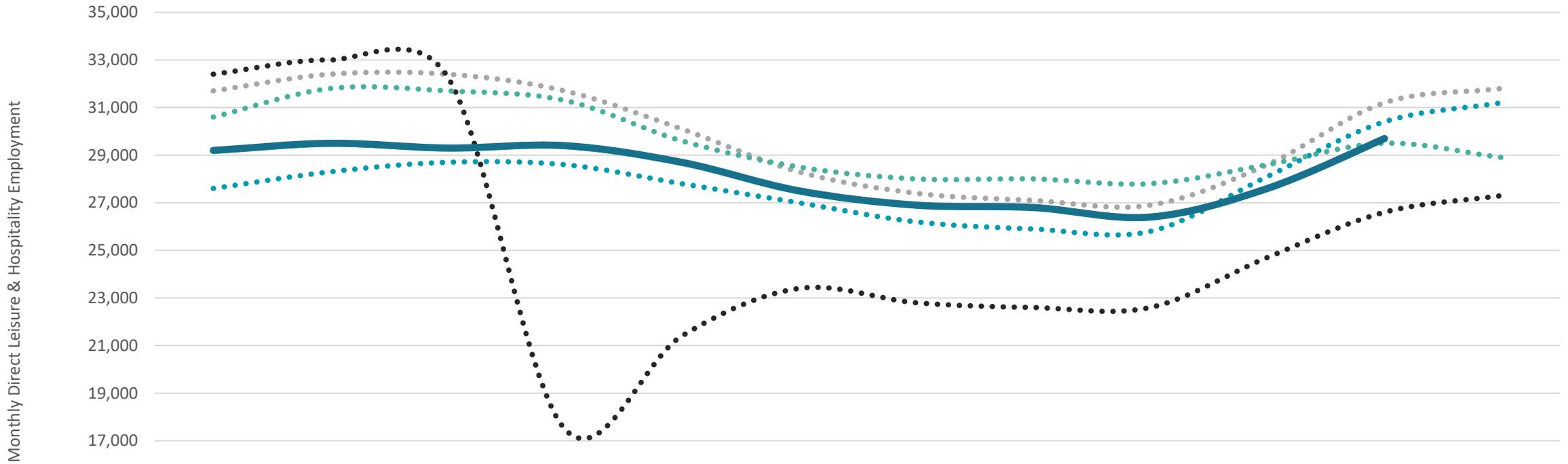
¹Metrics provided by STR.

INDUSTRY DATA



LEISURE & HOSPITALITY EMPLOYMENT

Collier County Direct Leisure and Hospitality Employment (Calendar Year)¹

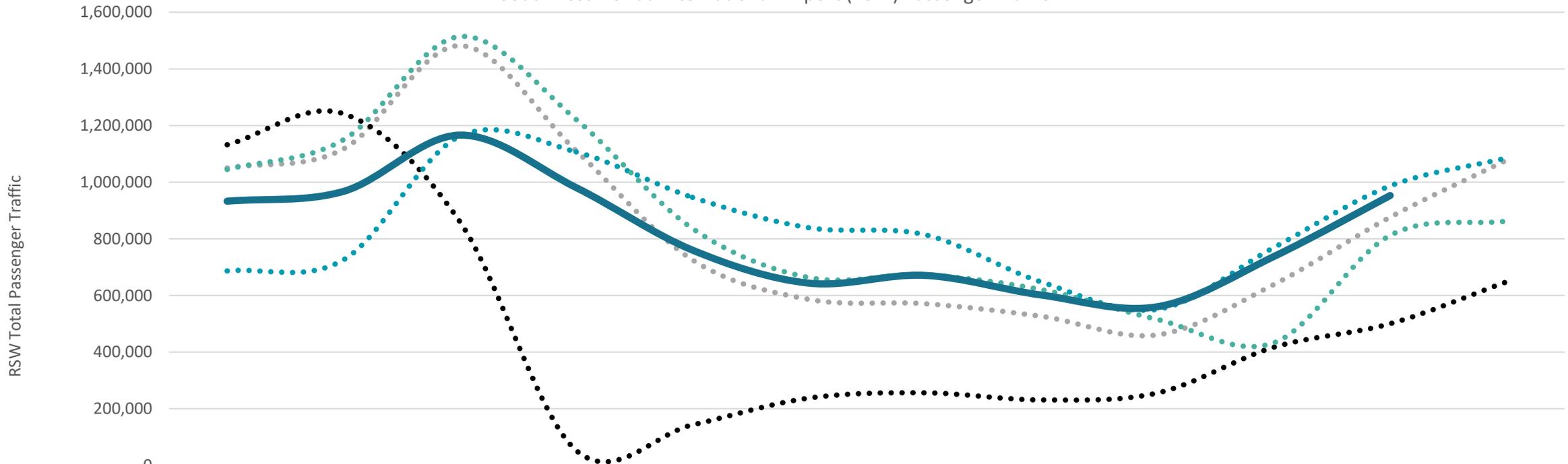


	January	February	March	April	May	June	July	August	September	October	November	December
••••• 2019	31,700	32,400	32,400	31,700	30,100	28,300	27,400	27,100	26,900	28,600	31,200	31,800
••••• 2020	32,400	33,000	32,300	17,500	21,400	23,400	22,800	22,600	22,600	24,700	26,600	27,300
••••• 2021	27,600	28,300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

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

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	

¹SOURCE: Lee County Port Authority Monthly Statistics.

LICENSED TRANSIENT RENTAL UNITS

December 2023 Licensed Transient Rental Units ¹				
	Hotel	Motel	Vacation Rental	Total
Naples	4,602	1,368	3,025	8,995
Marco Island	1,275	121	2,079	3,475
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	7	12
Ave Maria	0	0	6	6
Ochopee	0	0	1	1
Total	5,915	1,763	5,245	12,923²

¹SOURCE: Florida Department of Business & Professional Regulation.

²Some units are still unavailable due to the impact of Hurricane Ian.

NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau
December 2023 Monthly Dashboard

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