



NAPLES • MARCO ISLAND EVERGLADESSM

FLORIDA'S PARADISE COAST

February 2025 Monthly Visitor Dashboard

TABLE OF CONTENTS

- 1) **Monthly Highlights:** pg. 3-8
- 2) **Monthly Executive Summary:** pgs. 9-15
- 3) **Fiscal Year-to-Date (FYTD) Executive Summary:** pgs. 16-20
- 4) **Destination Comparisons:** pgs. 21-34
 - a) Monthly Comparisons: pgs. 21-27
 - b) Fiscal Year-to-Date (FYTD) Comparisons: pgs. 28-34
- 5) **Industry Data:** pgs. 35-40



1

MONTHLY
HIGHLIGHTS

February 2025 | TOURISM METRICS

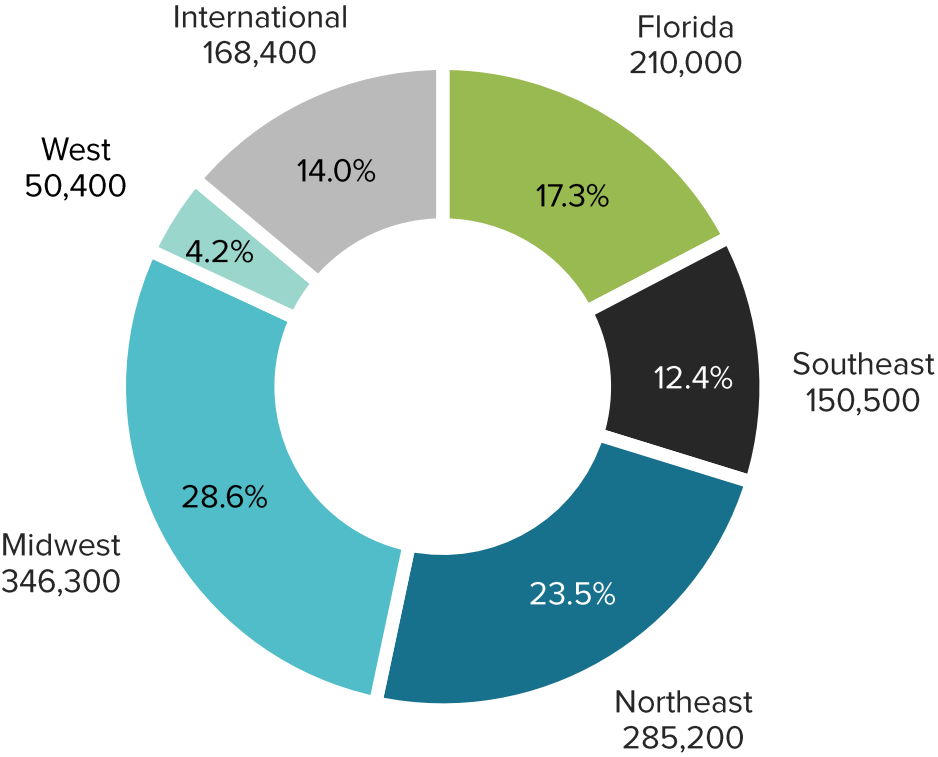
Metric	February 2024	February 2025	Percent Change
Visitors	274,500	261,200	- 4.8%
Visitor Days	1,814,600	1,854,500	+ 2.2%
Direct Spending	\$322,645,800	\$308,455,400	- 4.4%
Economic Impact	\$447,187,100	\$426,285,400	- 4.7%
Room Nights	287,000	278,900	- 2.8%
Occupancy	78.4%	76.6%	- 2.3%
Average Daily Rate	\$478.67	\$450.49	- 5.9%
RevPAR	\$375.28	\$345.08	- 8.0%

FYTD 2025 | TOURISM METRICS

Metric	FYTD 2024	FYTD 2025	Percent Change
Visitors	1,183,800	1,210,800	+ 2.3%
Visitor Days	7,531,400	8,128,000	+ 7.9%
Direct Spending	\$1,238,397,300	\$1,261,080,100	+ 1.8%
Economic Impact	\$1,717,611,300	\$1,743,322,900	+ 1.5%
Room Nights	1,206,900	1,261,000	+ 4.5%
Occupancy	63.7%	63.5%	- 0.3%
Average Daily Rate	\$385.65	\$370.70	- 3.9%
RevPAR	\$245.66	\$235.39	- 4.2%

FYTD 2025 | VISITOR ORIGIN

Region	FYTD 2024		FYTD 2025		Percent Change (±Δ%)	
	# Visitors	% Share	# Visitors	% Share	# Visitors	% Share
Florida	228,400	19.3%	210,000	17.3%	- 8.1%	- 10.1%
Southeast	146,900	12.4%	150,500	12.4%	+ 2.5%	+ 0.2%
Northeast	263,100	22.2%	285,200	23.5%	+ 8.4%	+ 6.0%
Midwest	324,000	27.4%	346,300	28.6%	+ 6.9%	+ 4.5%
West	60,900	5.1%	50,400	4.2%	- 17.2%	- 19.1%
Canada	60,500	5.1%	69,800	5.8%	+ 15.4%	+ 12.8%
Europe	75,300	6.4%	71,600	5.9%	- 4.9%	- 7.0%
C/S America	11,000	0.9%	14,000	1.2%	+ 27.3%	+ 24.4%
Other	13,700	1.2%	13,000	1.1%	- 5.1%	- 7.2%
Total	1,183,800	100.0%	1,210,800	100.0%		



Highlights

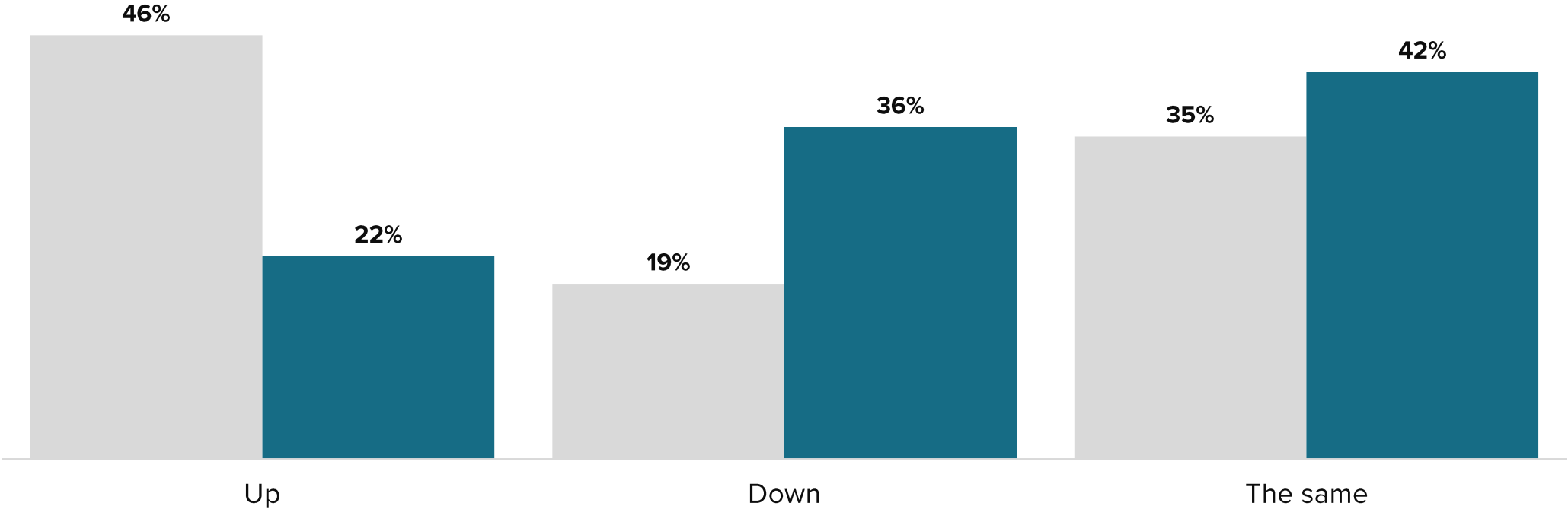
- Key tourism metrics—including visitation, room nights, visitor spending, and economic impact—were slightly lower compared to February 2024. However, it's important to note that February 2024 had an extra day due to the leap year, which accounts for some of the difference.
- Collier County hotel industry trends in February 2025:
 - 14.8% year-over-year increase in room supply and 11.7% year-over-year increase in room demand
 - Average Daily Rate (ADR) was still the highest in the competitive set despite year-over-year declines
 - Occupancy was the lowest in the competitive set
 - Revenue Per Available Room (RevPAR) was still the second highest in the competitive set

Potential Areas of Concern

- The total number of occupied room nights dropped by 2.8% compared to February 2024, which could signal a weakening demand. However, when adjusting for the extra day in February 2024, the average number of occupied room nights per day rose by 0.6%.
- International visitation declined this month, reflecting a broader trend of reduced interest among potential international travelers to the United States.

3-MONTH FORECAST¹ | MARCH - MAY

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



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

Disclaimer: This forecast is based on three-month forward-looking expectations provided by a sample of accommodation partners. Actual lodging performance has historically differed from these projections.

■ Feb-24 ■ Feb-25

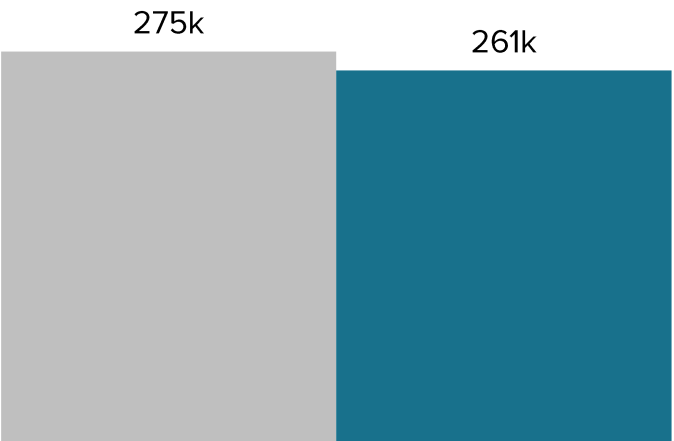


2

EXECUTIVE MONTHLY SUMMARY

VISITORS

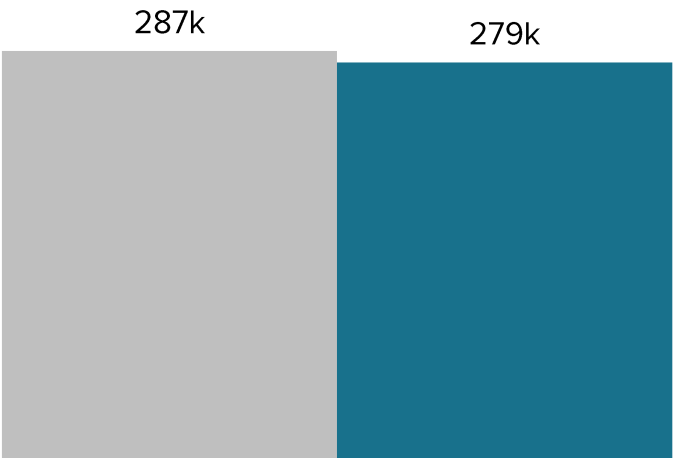
261,200



- 4.8% from 2024

ROOM NIGHTS

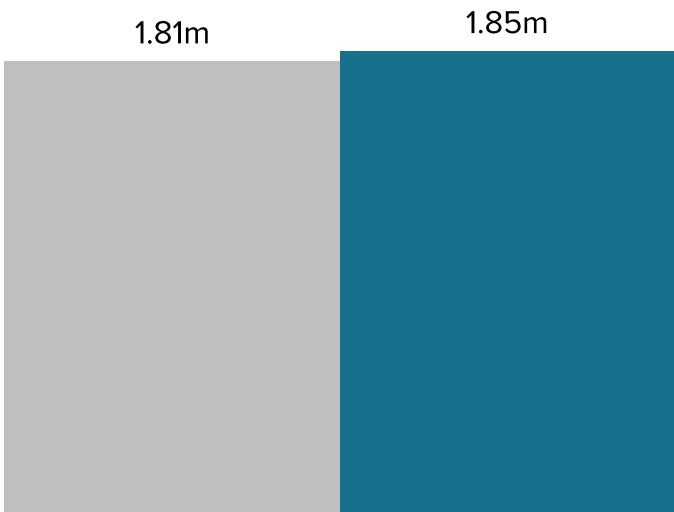
278,900



- 2.8% from 2024

VISITOR DAYS

1,854,500

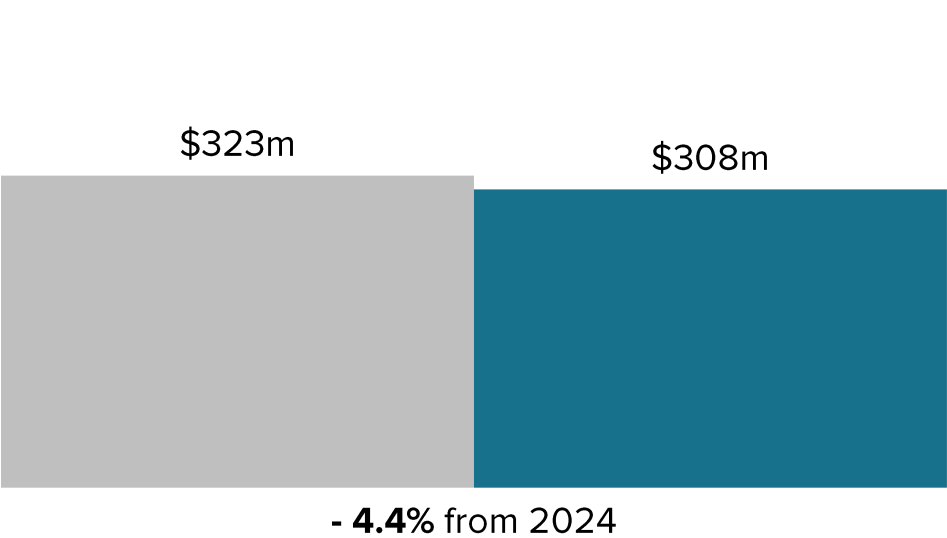


+ 2.2% from 2024

■ Feb-24 ■ Feb-25

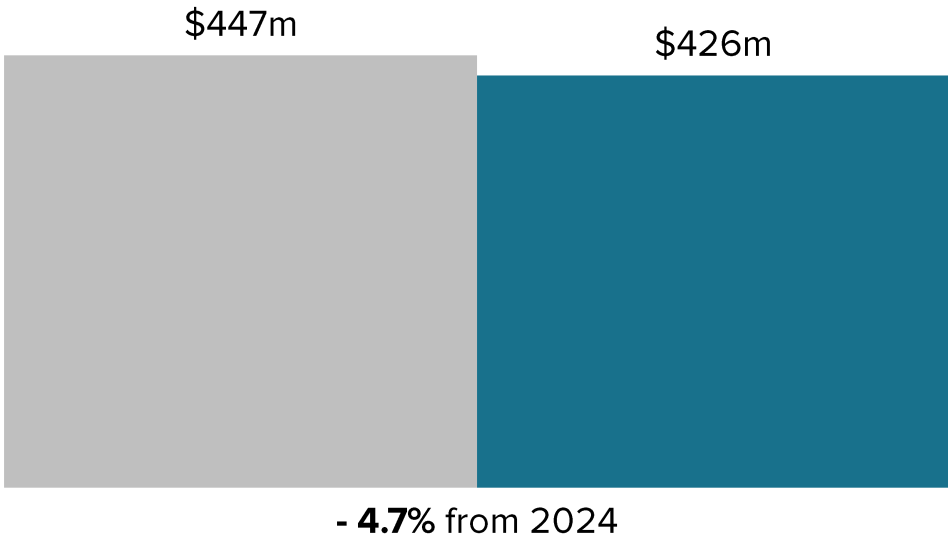
DIRECT SPENDING

\$308,455,400



ECONOMIC IMPACT

\$426,285,400



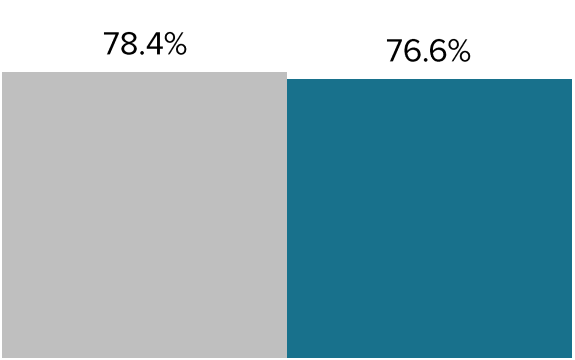
■ Feb-24 ■ Feb-25

¹The IMPLAN multiplier for Collier County was 1.386 for 2024 and is 1.382 in 2025.

FEBRUARY 2025 | OVERALL LODGING METRICS^{1,2}

OCCUPANCY RATE

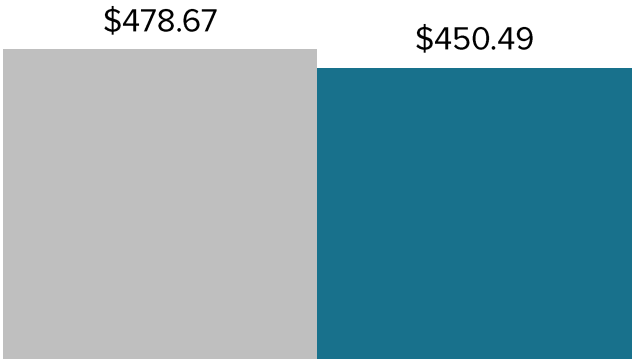
76.6%



- 2.3% from 2024

AVERAGE DAILY RATE

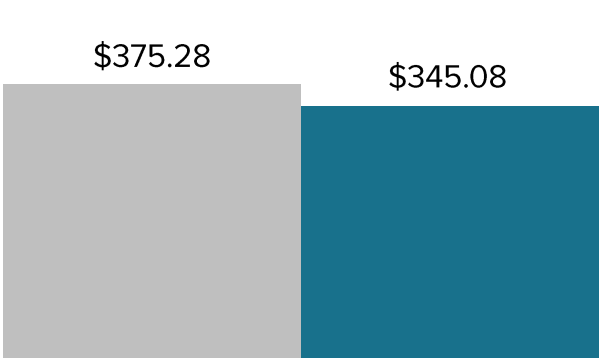
\$450.49



- 5.9% from 2024

REVENUE PER AVAILABLE ROOM

\$345.08



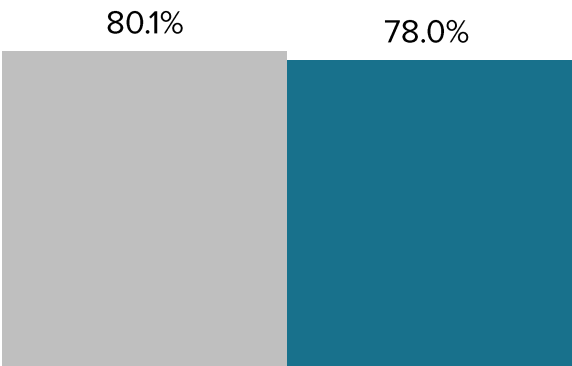
- 8.0% from 2024

■ Feb-24 ■ Feb-25

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

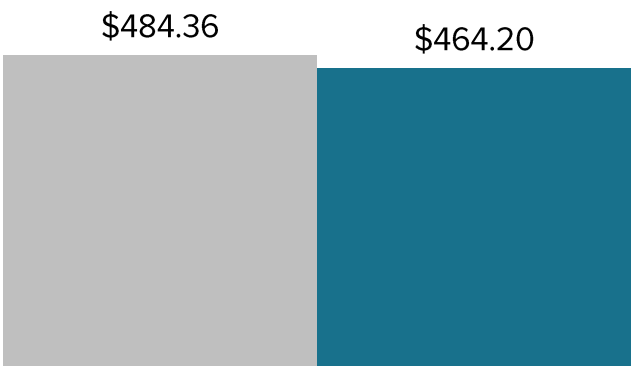
78.0%



- 2.7% from 2024

AVERAGE DAILY RATE

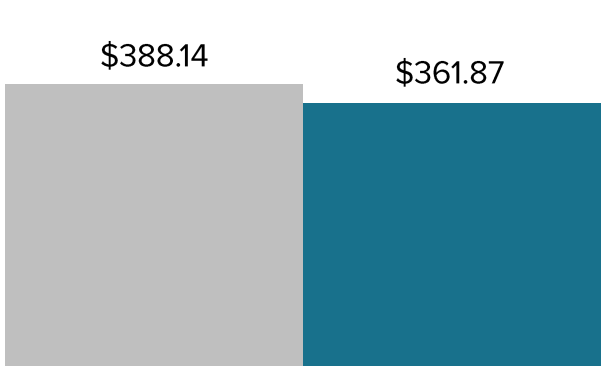
\$464.20



- 4.2% from 2024

REVENUE PER AVAILABLE ROOM

\$361.87



- 6.8% from 2024

¹Source: STR data

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

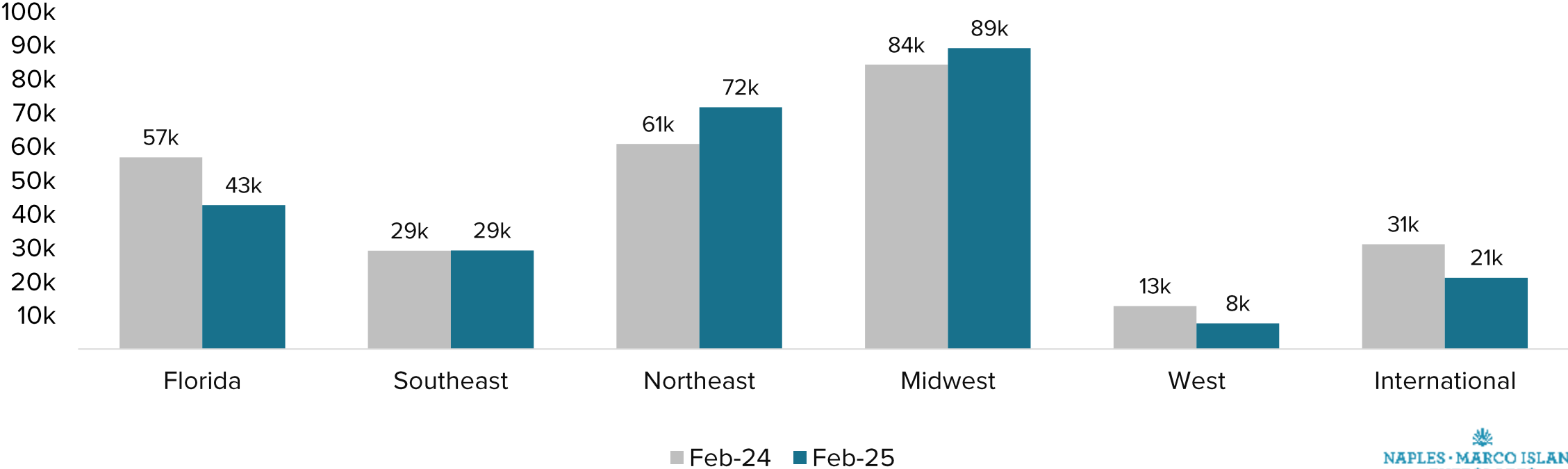
■ Feb-24 ■ Feb-25

FLORIDA VISITORS

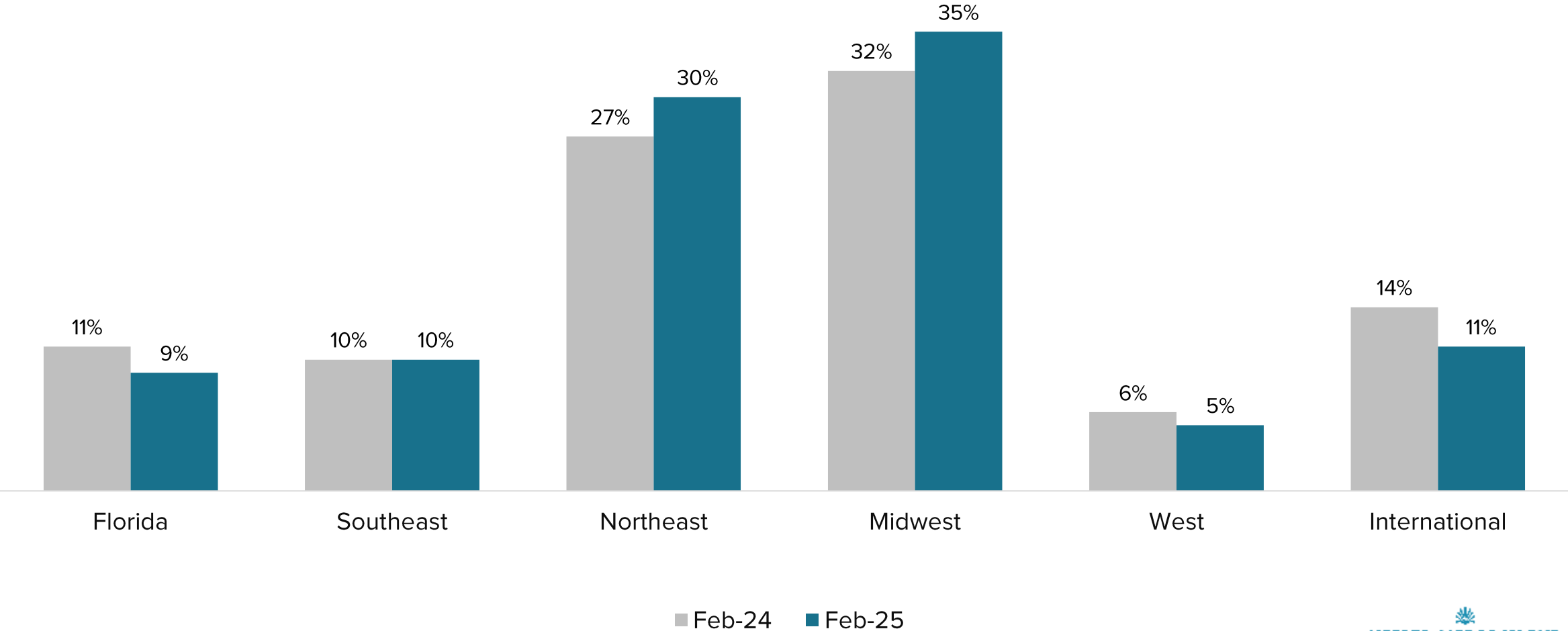
42,600

OUT-OF-STATE VISITORS

218,600



FEBRUARY 2025 | OVERNIGHT VISITOR ORIGINS





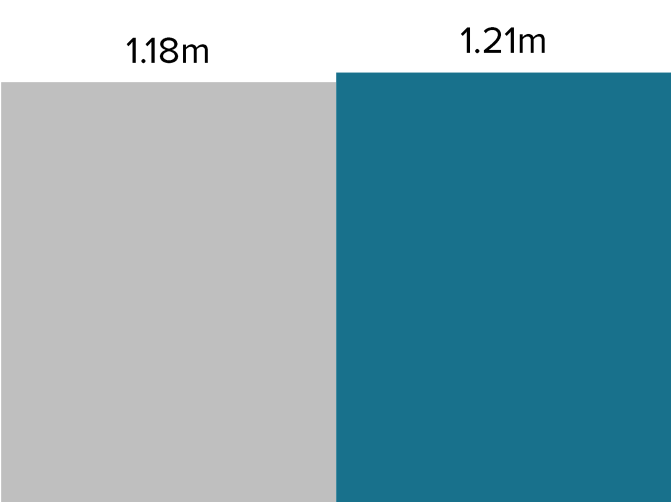
3

EXECUTIVE FISCAL YEAR-TO-DATE (FYTD) SUMMARY

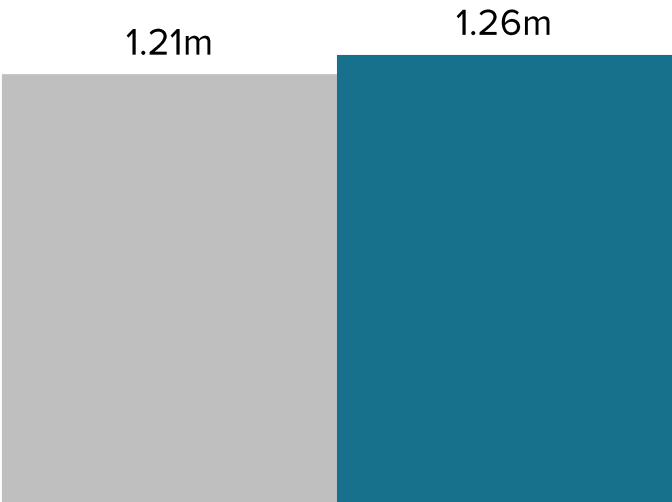
FYTD VISITORS
1,210,800

FYTD ROOM NIGHTS
1,261,000

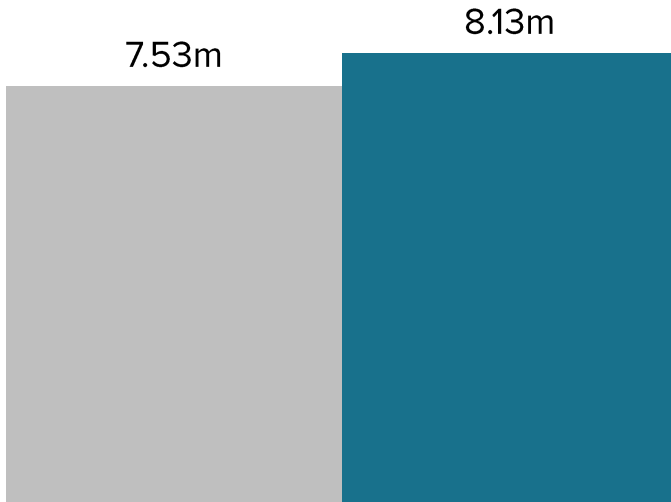
FYTD VISITOR DAYS
8,128,000



+ **2.3%** from FYTD 24



+ **4.5%** from FYTD 24



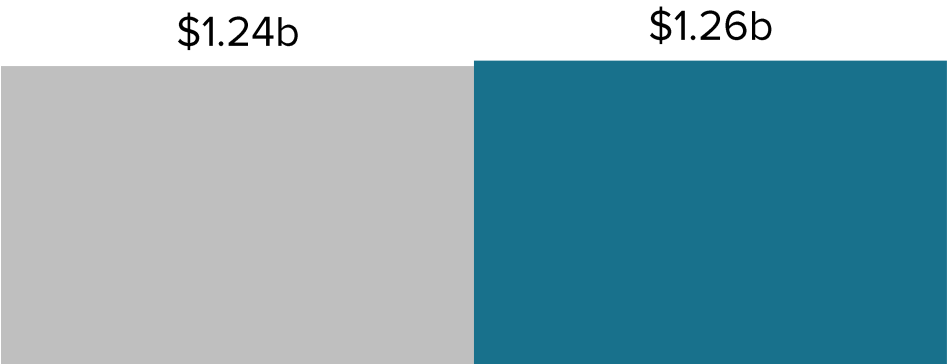
+ **7.9%** from FYTD 24

■ FYTD 24 ■ FYTD 25

FYTD DIRECT SPENDING

\$1,261,080,100

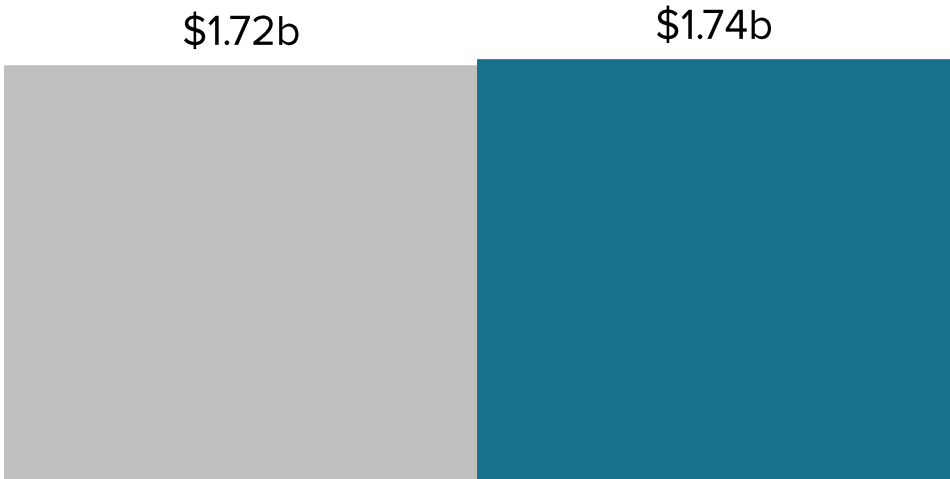
+ 1.8% from FYTD 24



FYTD ECONOMIC IMPACT

\$1,743,322,900

+ 1.5% from FYTD 24¹



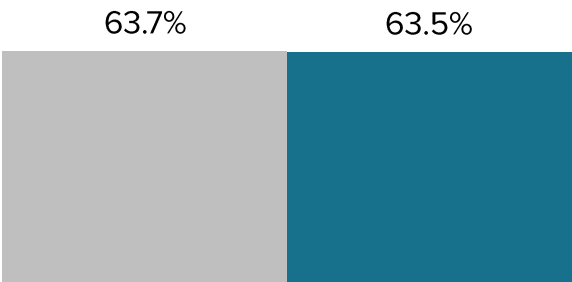
¹The IMPLAN multiplier for Collier County was 1.386 for 2024 and is 1.382 in 2025.

■ FYTD 24 ■ FYTD 25

FYTD 2025 | OVERALL LODGING METRICS^{1,2}

OCCUPANCY RATE

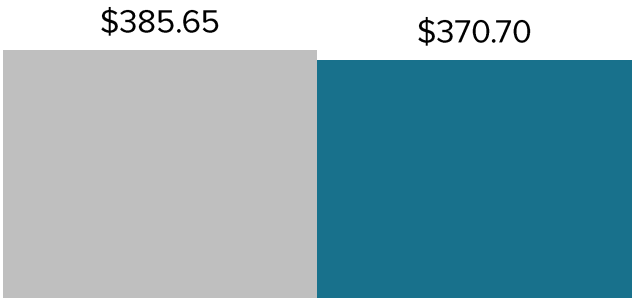
63.5%



- 0.3% from FYTD 24

AVERAGE DAILY RATE

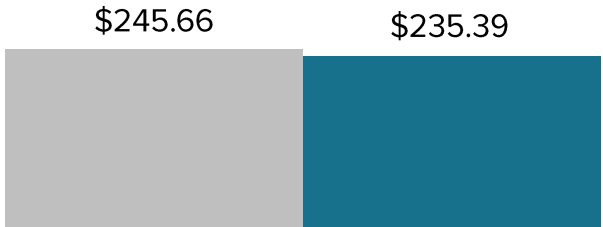
\$370.70



- 3.9% from FYTD 24

REVENUE PER AVAILABLE ROOM

\$235.39



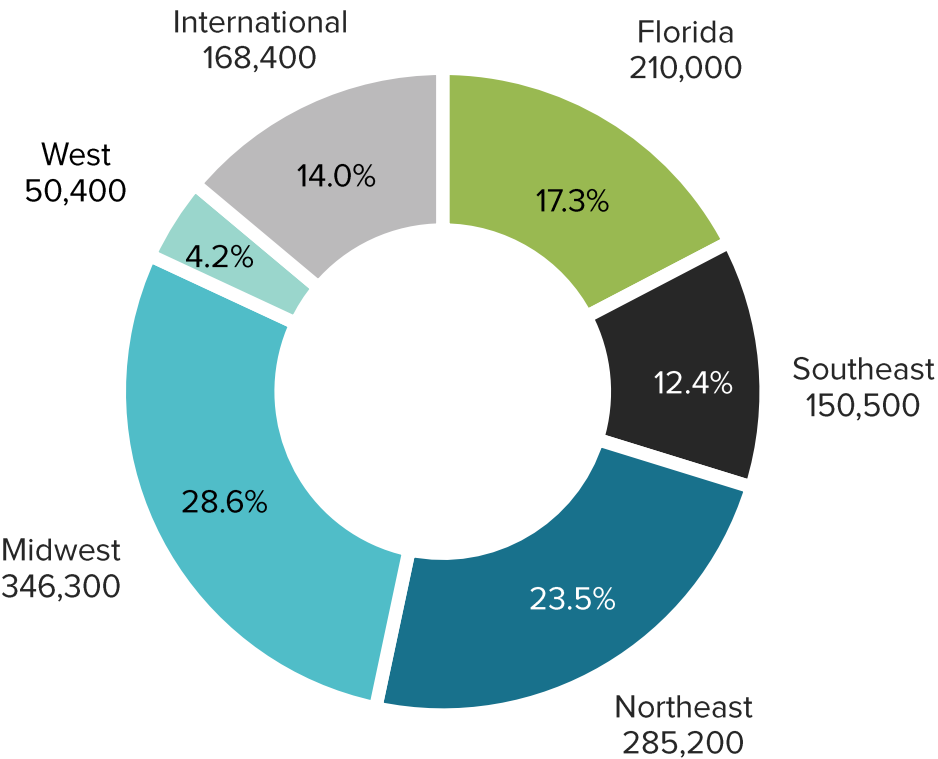
- 4.2% from FYTD 24

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.

FYTD 2025 | VISITOR ORIGIN

Region	FYTD 2024		FYTD 2025		Percent Change (±Δ%)	
	# Visitors	% Share	# Visitors	% Share	# Visitors	% Share
Florida	228,400	19.3%	210,000	17.3%	- 8.1%	- 10.1%
Southeast	146,900	12.4%	150,500	12.4%	+ 2.5%	+ 0.2%
Northeast	263,100	22.2%	285,200	23.5%	+ 8.4%	+ 6.0%
Midwest	324,000	27.4%	346,300	28.6%	+ 6.9%	+ 4.5%
West	60,900	5.1%	50,400	4.2%	- 17.2%	- 19.1%
Canada	60,500	5.1%	69,800	5.8%	+ 15.4%	+ 12.8%
Europe	75,300	6.4%	71,600	5.9%	- 4.9%	- 7.0%
C/S America	11,000	0.9%	14,000	1.2%	+ 27.3%	+ 24.4%
Other	13,700	1.2%	13,000	1.1%	- 5.1%	- 7.2%
Total	1,183,800	100.0%	1,210,800	100.0%		





4a

MONTHLY
DESTINATION
COMPARISONS

DESTINATION COMPARISONS | SUPPLY

	Hotel Supply (Rooms)	Δ% in Supply from February 2024
	Total	Total
Miami	1,831,900	- 0.2%
Ft. Lauderdale	1,105,944	+ 0.8%
Palm Beach	546,560	+ 1.3%
Ft. Myers	351,988	+ 9.6%
Sarasota	349,048	+ 2.0%
Florida Keys	298,480	+ 1.6%
St. Petersburg	291,116	- 9.7%
Clearwater	259,896	+ 2.5%
Naples	238,336	+ 14.8%

¹ Metrics provided by STR.

² Transient bookings include rooms sold to individuals or groups occupying less than 10 rooms per night.

³ Group bookings include bookings of 10 rooms or more per night, sold pursuant to a signed agreement.

⁴ Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.

DESTINATION COMPARISONS | DEMAND

	Hotel Demand (Rooms)				Δ% in Demand from February 2024			
	Transient ²	Group ³	Contract ⁴	Total	Transient ²	Group ³	Contract ⁴	Total
Miami	1,139,478	333,207	94,430	1,567,115	- 0.3%	+ 6.2%	+ 14.6%	+ 1.9%
Ft. Lauderdale	705,450	180,548	25,656	911,654	- 0.9%	+ 3.5%	- 13.7%	- 0.4%
Palm Beach	332,613	124,643	10,548	467,804	+ 2.6%	+ 22.0%	- 11.7%	+ 6.7%
Sarasota	221,304	57,712	8,674	287,691	+ 4.4%	- 3.5%	+ 70.8%	+ 3.9%
Ft. Myers	200,552	54,369	21,875	276,796	+ 6.1%	+ 21.0%	+ 2.0%	+ 8.4%
Florida Keys	225,505	29,086	750	255,342	+ 5.1%	- 17.9%	+ 25.0%	+ 1.9%
St. Petersburg	169,454	76,319	4,365	250,138	- 4.0%	+ 12.6%	+ 82.2%	+ 1.4%
Clearwater	154,924	72,428	0	227,352	+ 14.7%	+ 17.6%	-	+ 15.6%
Naples	126,157	59,640	0	185,797	+ 7.0%	+ 23.4%	- 100.0%	+ 11.7%

¹ Metrics provided by STR.

² Transient bookings include rooms sold to individuals or groups occupying less than 10 rooms per night.

³ Group bookings include bookings of 10 rooms or more per night, sold pursuant to a signed agreement.

⁴ Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.

DESTINATION COMPARISONS | OCCUPANCY

	Hotel Occupancy (%)				Δ% in Occupancy from February 2024			
	Transient ²	Group ³	Contract ⁴	Total	Transient ²	Group ³	Contract ⁴	Total
Clearwater	59.6%	27.9%	0.0%	87.5%	+ 11.9%	+ 14.7%	0.0%	+ 12.8%
St. Petersburg	58.2%	26.2%	1.5%	85.9%	+ 6.4%	+ 24.7%	+ 101.9%	+ 12.3%
Palm Beach	60.9%	22.8%	1.9%	85.6%	+ 1.2%	+ 20.3%	- 12.9%	+ 5.3%
Florida Keys	75.6%	9.7%	0.3%	85.5%	+ 3.4%	- 19.2%	+ 23.0%	+ 0.2%
Miami	62.2%	18.2%	5.2%	85.5%	- 0.1%	+ 6.4%	+ 14.8%	+ 2.1%
Ft. Lauderdale	63.8%	16.3%	2.3%	82.4%	- 1.6%	+ 2.8%	- 14.3%	- 1.2%
Sarasota	63.4%	16.5%	2.5%	82.4%	+ 2.3%	- 5.4%	+ 67.4%	+ 1.8%
Ft. Myers	57.0%	15.4%	6.2%	78.6%	- 3.2%	+ 10.3%	- 6.9%	- 1.1%
Naples	52.9%	25.0%	0.0%	78.0%	- 6.8%	+ 7.5%	- 100.0%	- 2.7%

¹ Metrics provided by STR.

² Transient bookings include rooms sold to individuals or groups occupying less than 10 rooms per night.

³ Group bookings include bookings of 10 rooms or more per night, sold pursuant to a signed agreement.

⁴ Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.

DESTINATION COMPARISONS | REVENUE

	Hotel Revenue (Millions of Dollars)				Δ% in Revenue from February 2024			
	Transient ²	Group ³	Contract ⁴	Total	Transient ²	Group ³	Contract ⁴	Total
Miami	\$353.81	\$110.48	\$14.13	\$478.42	+ 4.7%	+ 10.8%	+ 27.0%	+ 6.6%
Ft. Lauderdale	\$168.98	\$50.75	\$4.51	\$224.24	+ 0.9%	+ 6.7%	- 7.5%	+ 2.0%
Palm Beach	\$135.40	\$42.65	\$1.80	\$179.85	+ 12.6%	+ 16.9%	- 12.9%	+ 13.3%
Florida Keys	\$103.78	\$13.17	\$0.21	\$117.15	+ 1.8%	- 13.7%	- 14.3%	- 0.2%
Naples	\$60.22	\$26.03	\$0.00	\$86.25	+ 2.9%	+ 18.2%	- 100.0%	+ 7.1%
Sarasota	\$59.31	\$14.34	\$1.66	\$75.30	+ 5.1%	+ 8.1%	+ 95.0%	+ 6.7%
Ft. Myers	\$46.36	\$13.28	\$4.51	\$64.14	+ 4.7%	+ 19.7%	+ 11.3%	+ 8.0%
St. Petersburg	\$40.31	\$15.73	\$0.67	\$56.71	- 0.8%	+ 15.2%	+ 166.2%	+ 4.0%
Clearwater	\$38.45	\$16.56	\$0.00	\$55.01	+ 21.0%	+ 23.6%	-	+ 21.7%

¹ Metrics provided by STR.

² Transient bookings include rooms sold to individuals or groups occupying less than 10 rooms per night.

³ Group bookings include bookings of 10 rooms or more per night, sold pursuant to a signed agreement.

⁴ Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.

DESTINATION COMPARISONS | DAILY RATE

	Hotel Average Daily Rate (\$)				Δ% in ADR from February 2024			
	Transient ²	Group ³	Contract ⁴	Total	Transient ²	Group ³	Contract ⁴	Total
Naples	\$477.35	\$436.40	\$0.00	\$464.20	- 3.8%	- 4.2%	- 100.0%	- 4.2%
Florida Keys	\$460.19	\$452.67	\$281.98	\$458.81	- 3.1%	+ 5.1%	- 31.4%	- 2.1%
Palm Beach	\$407.07	\$342.19	\$170.34	\$384.45	+ 9.7%	- 4.1%	- 1.3%	+ 6.1%
Miami	\$310.50	\$331.58	\$149.58	\$305.28	+ 5.0%	+ 4.3%	+ 10.8%	+ 4.7%
Sarasota	\$268.00	\$248.43	\$190.99	\$261.75	+ 0.7%	+ 12.0%	+ 14.2%	+ 2.7%
Ft. Lauderdale	\$239.53	\$281.11	\$175.81	\$245.97	+ 1.8%	+ 3.0%	+ 7.2%	+ 2.5%
Clearwater	\$248.22	\$228.59	\$0.00	\$241.96	+ 5.4%	+ 5.1%	0.0%	+ 5.3%
Ft. Myers	\$231.17	\$244.17	\$206.06	\$231.74	- 1.3%	- 1.0%	+ 9.0%	- 0.4%
St. Petersburg	\$237.87	\$206.05	\$153.91	\$226.70	+ 3.3%	+ 2.3%	+ 46.1%	+ 2.5%

¹ Metrics provided by STR.

² Transient bookings include rooms sold to individuals or groups occupying less than 10 rooms per night.

³ Group bookings include bookings of 10 rooms or more per night, sold pursuant to a signed agreement.

⁴ Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.

DESTINATION COMPARISONS | REVPAR

	Hotel Revenue Per Available Room (\$)				Δ% in RevPAR from February 2024			
	Transient ²	Group ³	Contract ⁴	Total	Transient ²	Group ³	Contract ⁴	Total
Florida Keys	\$347.68	\$44.11	\$0.71	\$392.50	+ 0.2%	- 15.0%	- 15.7%	- 1.8%
Naples	\$252.67	\$109.20	\$0.00	\$361.87	- 10.4%	+ 2.9%	- 100.0%	- 6.8%
Palm Beach	\$247.73	\$78.04	\$3.29	\$329.05	+ 11.1%	+ 15.4%	- 14.0%	+ 11.7%
Miami	\$193.14	\$60.31	\$7.71	\$261.16	+ 4.9%	+ 11.0%	+ 27.2%	+ 6.8%
Sarasota	\$169.92	\$41.08	\$4.75	\$215.74	+ 3.0%	+ 5.9%	+ 91.1%	+ 4.6%
Clearwater	\$147.96	\$63.70	\$0.00	\$211.67	+ 18.0%	+ 20.5%	0.0%	+ 18.7%
Ft. Lauderdale	\$152.79	\$45.89	\$4.08	\$202.76	+ 0.2%	+ 5.9%	- 8.2%	+ 1.2%
St. Petersburg	\$138.46	\$54.02	\$2.31	\$194.79	+ 9.9%	+ 27.7%	+ 194.9%	+ 15.2%
Ft. Myers	\$131.71	\$37.72	\$12.81	\$182.23	- 4.5%	+ 9.2%	+ 1.5%	- 1.5%

¹ Metrics provided by STR.

² Transient bookings include rooms sold to individuals or groups occupying less than 10 rooms per night.

³ Group bookings include bookings of 10 rooms or more per night, sold pursuant to a signed agreement.

⁴ Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.



4b

FISCAL YTD
DESTINATION
COMPARISONS

DESTINATION COMPARISONS | SUPPLY

	Hotel Supply (Rooms)	%Δ in Supply from FYTD 2024
	Total	Total
Miami	9,832,658	- 0.2%
Ft. Lauderdale	5,915,122	+ 0.3%
Palm Beach	2,921,932	+ 0.7%
Sarasota	1,868,166	+ 0.1%
Ft. Myers	1,809,842	+ 5.8%
Florida Keys	1,609,200	+ 1.1%
St. Petersburg	1,563,343	- 9.6%
Clearwater	1,361,106	- 1.2%
Naples	1,266,982	+ 14.5%

¹ Metrics provided by STR.

² Transient bookings include rooms sold to individuals or groups occupying less than 10 rooms per night.

³ Group bookings include bookings of 10 rooms or more per night, sold pursuant to a signed agreement.

⁴ Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.

DESTINATION COMPARISONS | DEMAND

	Hotel Demand (Rooms)				%Δ in Demand from FYTD 2024			
	Transient ²	Group ³	Contract ⁴	Total	Transient ²	Group ³	Contract ⁴	Total
Miami	5,750,659	1,301,409	456,422	7,508,491	- 0.2%	+ 4.3%	+ 9.7%	+ 1.1%
Ft. Lauderdale	3,473,643	775,205	121,268	4,370,116	+ 0.7%	- 0.2%	- 23.9%	- 0.3%
Palm Beach	1,619,328	530,101	43,518	2,192,947	+ 4.7%	+ 25.6%	- 10.6%	+ 8.7%
Sarasota	1,073,670	293,479	42,510	1,409,659	+ 11.4%	+ 17.5%	+ 6.7%	+ 12.4%
Ft. Myers	908,565	239,421	92,106	1,240,093	+ 5.9%	+ 6.9%	- 3.9%	+ 5.3%
St. Petersburg	867,895	329,003	28,065	1,224,963	+ 8.2%	+ 17.4%	+ 136.8%	+ 12.0%
Florida Keys	995,665	148,370	7,663	1,151,698	- 1.3%	- 10.8%	+ 181.3%	- 2.2%
Clearwater	730,995	325,505	186	1,056,686	+ 12.3%	+ 32.0%	- 1.8%	+ 17.7%
Naples	581,117	265,849	0	846,965	+ 15.1%	+ 9.4%	- 100.0%	+ 13.1%

¹ Metrics provided by STR.

² Transient bookings include rooms sold to individuals or groups occupying less than 10 rooms per night.

³ Group bookings include bookings of 10 rooms or more per night, sold pursuant to a signed agreement.

⁴ Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.

DESTINATION COMPARISONS | OCCUPANCY

	Hotel Occupancy (%)				%Δ in Occupancy from FYTD 2024			
	Transient ²	Group ³	Contract ⁴	Total	Transient ²	Group ³	Contract ⁴	Total
St. Petersburg	55.5%	21.0%	1.8%	78.4%	+ 19.7%	+ 29.8%	+ 161.8%	+ 23.8%
Clearwater	53.7%	23.9%	0.0%	77.6%	+ 13.6%	+ 33.6%	- 0.6%	+ 19.1%
Miami	58.5%	13.2%	4.6%	76.4%	0.0%	+ 4.4%	+ 9.9%	+ 1.3%
Sarasota	57.5%	15.7%	2.3%	75.5%	+ 11.3%	+ 17.4%	+ 6.6%	+ 12.3%
Palm Beach	55.4%	18.1%	1.5%	75.1%	+ 4.0%	+ 24.7%	- 11.2%	+ 8.0%
Ft. Lauderdale	58.7%	13.1%	2.1%	73.9%	+ 0.4%	- 0.5%	- 24.1%	- 0.6%
Florida Keys	61.9%	9.2%	0.5%	71.6%	- 2.3%	- 11.8%	+ 178.3%	- 3.2%
Ft. Myers	50.2%	13.2%	5.1%	68.5%	+ 0.1%	+ 1.0%	- 9.2%	- 0.5%
Naples	45.9%	21.0%	0.0%	66.8%	+ 0.5%	- 4.5%	- 100.0%	- 1.2%

¹ Metrics provided by STR.

² Transient bookings include rooms sold to individuals or groups occupying less than 10 rooms per night.

³ Group bookings include bookings of 10 rooms or more per night, sold pursuant to a signed agreement.

⁴ Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.

DESTINATION COMPARISONS | REVENUE

	Hotel Revenue (Millions of Dollars)				%Δ in Revenue from FYTD 2024			
	Transient ²	Group ³	Contract ⁴	Total	Transient ²	Group ³	Contract ⁴	Total
Miami	\$1,453.45	\$363.13	\$61.86	\$1,878.44	+ 3.1%	+ 9.7%	+ 21.0%	+ 4.8%
Ft. Lauderdale	\$671.07	\$179.69	\$18.30	\$869.05	+ 2.0%	+ 1.7%	- 16.5%	+ 1.5%
Palm Beach	\$474.87	\$149.72	\$5.87	\$630.46	+ 11.4%	+ 20.2%	- 3.8%	+ 13.2%
Florida Keys	\$374.29	\$53.71	\$4.22	\$432.22	- 2.7%	- 10.7%	+ 325.3%	- 3.1%
Naples	\$205.50	\$85.56	\$0.00	\$291.05	+ 9.1%	+ 13.3%	- 100.0%	+ 10.2%
Sarasota	\$221.45	\$62.16	\$6.80	\$290.41	+ 14.0%	+ 30.4%	+ 39.7%	+ 17.7%
St. Petersburg	\$161.37	\$58.55	\$3.47	\$223.40	+ 10.1%	+ 21.9%	+ 229.5%	+ 14.2%
Ft. Myers	\$155.27	\$44.51	\$14.59	\$214.37	+ 4.0%	+ 3.1%	+ 3.3%	+ 3.8%
Clearwater	\$138.15	\$64.80	\$0.00	\$202.96	+ 15.4%	+ 40.3%	- 11.7%	+ 22.3%

¹ Metrics provided by STR.

² Transient bookings include rooms sold to individuals or groups occupying less than 10 rooms per night.

³ Group bookings include bookings of 10 rooms or more per night, sold pursuant to a signed agreement.

⁴ Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.

DESTINATION COMPARISONS | DAILY RATE

	Hotel Average Daily Rate (\$)				%Δ in ADR from FYTD 2024			
	Transient ²	Group ³	Contract ⁴	Total	Transient ²	Group ³	Contract ⁴	Total
Florida Keys	\$375.92	\$361.99	\$550.98	\$375.29	- 1.4%	+ 0.2%	+ 51.2%	- 0.9%
Naples	\$353.63	\$321.82	\$0.00	\$343.64	- 5.3%	+ 3.6%	- 100.0%	- 2.6%
Palm Beach	\$293.25	\$282.44	\$134.94	\$287.49	+ 6.3%	- 4.3%	+ 7.6%	+ 4.1%
Miami	\$252.75	\$279.02	\$135.54	\$250.18	+ 3.3%	+ 5.2%	+ 10.2%	+ 3.7%
Sarasota	\$206.26	\$211.81	\$159.98	\$206.02	+ 2.4%	+ 10.9%	+ 30.9%	+ 4.7%
Ft. Lauderdale	\$193.19	\$231.79	\$150.89	\$198.86	+ 1.3%	+ 12.0%	+ 9.8%	+ 1.8%
Clearwater	\$188.99	\$199.08	\$6.69	\$192.07	+ 2.8%	+ 6.2%	- 10.1%	+ 3.9%
St. Petersburg	\$185.94	\$177.97	\$123.55	\$182.37	+ 1.7%	+ 3.8%	+ 39.2%	+ 2.0%
Ft. Myers	\$170.90	\$185.90	\$158.43	\$172.87	- 1.8%	- 3.5%	+ 7.5%	- 1.4%

¹ Metrics provided by STR.

² Transient bookings include rooms sold to individuals or groups occupying less than 10 rooms per night.

³ Group bookings include bookings of 10 rooms or more per night, sold pursuant to a signed agreement.

⁴ Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.

DESTINATION COMPARISONS | REVPAR

	Hotel Revenue Per Available Room (\$)				%Δ in RevPAR from FYTD 2024			
	Transient ²	Group ³	Contract ⁴	Total	Transient ²	Group ³	Contract ⁴	Total
Florida Keys	\$232.59	\$33.38	\$2.62	\$268.59	- 3.7%	- 11.6%	+ 320.8%	- 4.1%
Naples	\$162.20	\$67.53	\$0.00	\$229.72	- 4.8%	- 1.1%	- 100.0%	- 3.8%
Palm Beach	\$162.52	\$51.24	\$2.01	\$215.77	+ 10.6%	+ 19.4%	- 4.5%	+ 12.4%
Miami	\$147.82	\$36.93	\$6.29	\$191.04	+ 3.3%	+ 9.8%	+ 21.2%	+ 5.0%
Sarasota	\$118.54	\$33.27	\$3.64	\$155.45	+ 13.9%	+ 30.3%	+ 39.5%	+ 17.6%
Clearwater	\$101.50	\$47.61	\$0.00	\$149.11	+ 16.8%	+ 42.0%	- 10.6%	+ 23.8%
Ft. Lauderdale	\$113.45	\$30.38	\$3.09	\$146.92	+ 1.7%	+ 1.4%	- 16.7%	+ 1.2%
St. Petersburg	\$103.22	\$37.45	\$2.22	\$142.90	+ 21.8%	+ 34.8%	+ 264.4%	+ 26.3%
Ft. Myers	\$85.79	\$24.59	\$8.06	\$118.45	- 1.7%	- 2.5%	- 2.4%	- 1.9%

¹ Metrics provided by STR.

² Transient bookings include rooms sold to individuals or groups occupying less than 10 rooms per night.

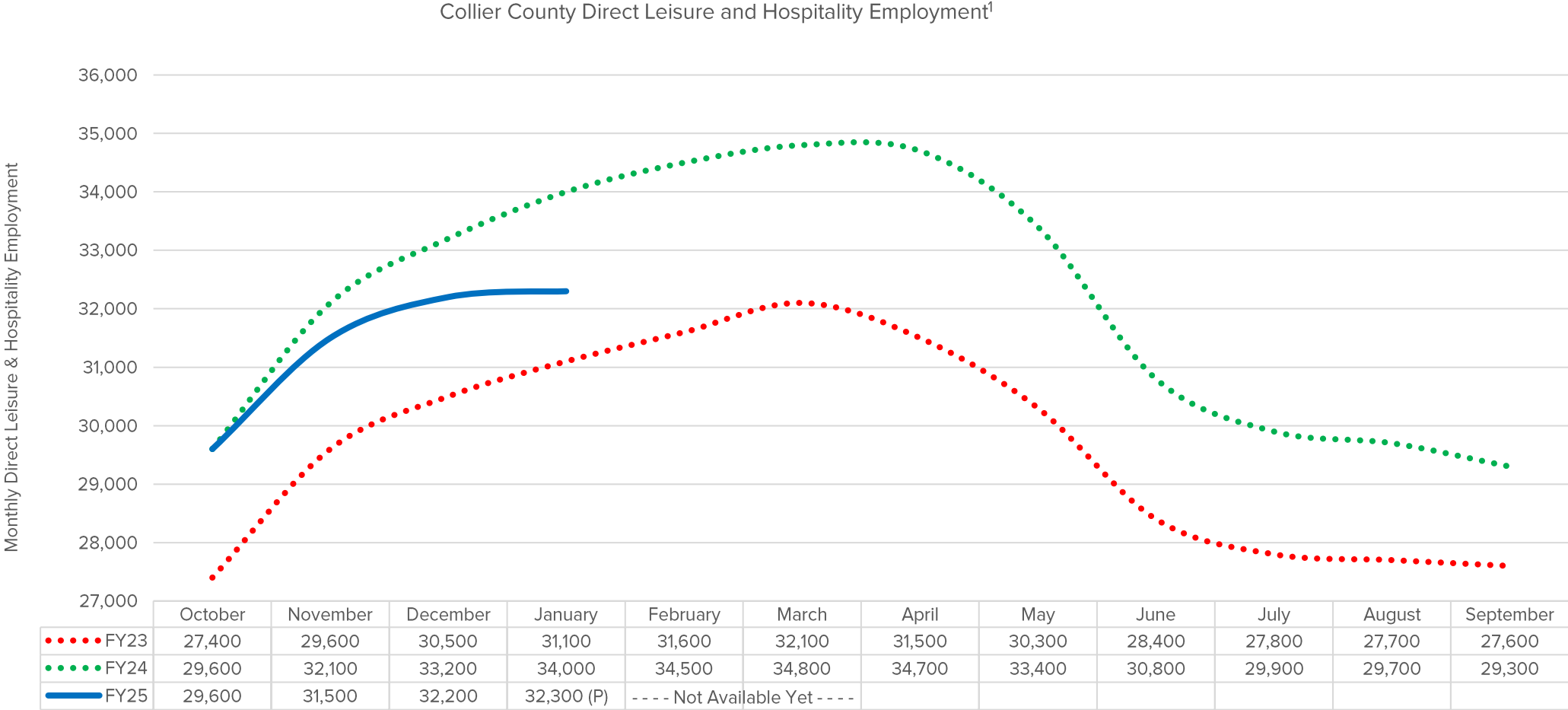
³ Group bookings include bookings of 10 rooms or more per night, sold pursuant to a signed agreement.

⁴ Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.

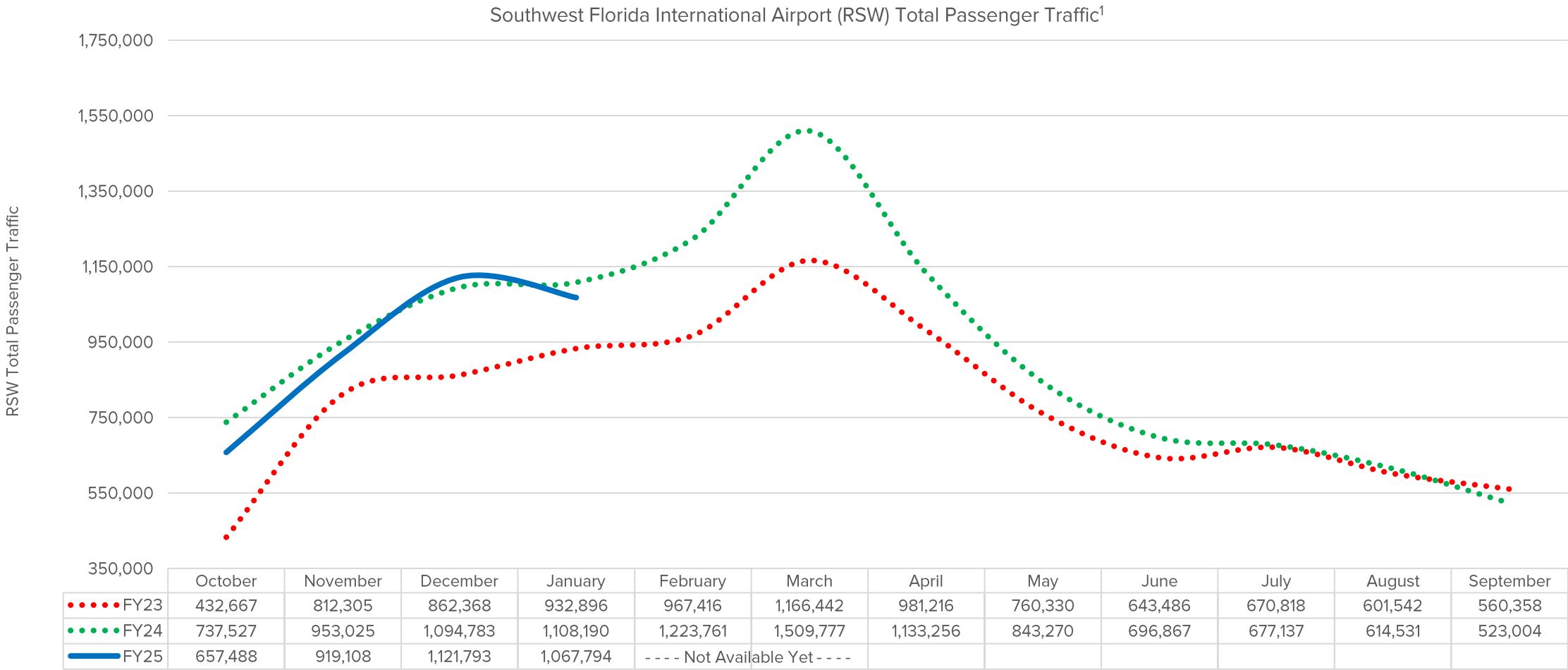


5

INDUSTRY
DATA

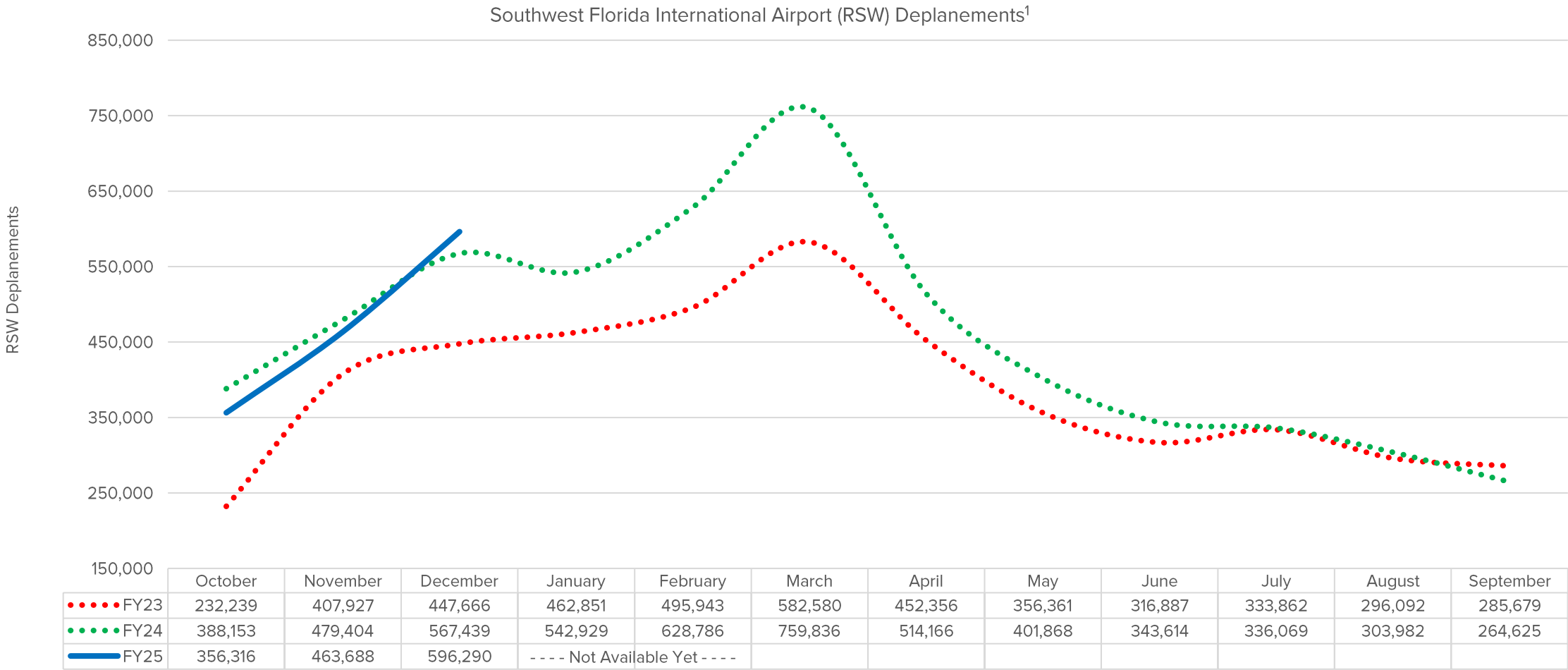


¹SOURCE: [Current Employment Statistic Program \(CES\), Collier County Leisure and Hospitality Sector, not seasonally adjusted.](#)
(P) Preliminary.

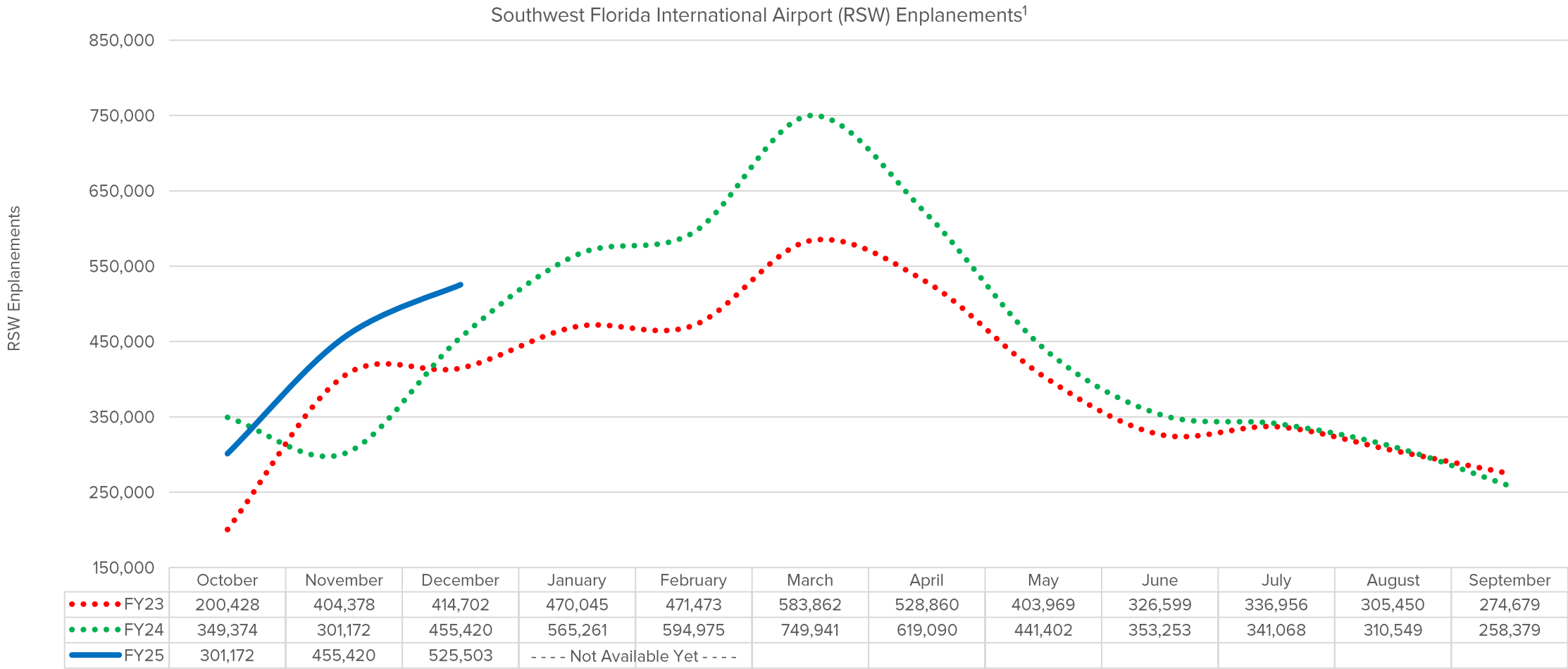


¹SOURCE: Lee County Port Authority Monthly Statistics.

INDUSTRY DATA | RSW INFLOW (DEPLANEMENTS)



¹SOURCE: Lee County Port Authority Monthly Statistics.



¹SOURCE: Lee County Port Authority Monthly Statistics.

INDUSTRY DATA | LICENSED RENTAL UNITS

Licensed Transient Rental Units as of March 1 st , 2025 ¹				
	Hotel	Motel	Vacation Rental	Total
Naples	5,315	1,368	2,513	9,196
Marco Island	1,299	97	1,878	3,274
Immokalee	0	70	98	168
Golden Gate	0	116	0	116
Everglades City	38	36	20	94
Chokoloskee	0	13	1	14
Goodland	0	5	8	13
Ave Maria	0	0	6	6
Ochopee	0	0	1	1
Total	6,652	1,705	4,525	12,882

¹SOURCE: Florida Department of Business & Professional Regulation.

Questions?

Contact Info:

Naples, Marco Island, Everglades CVB

Jay Tusa, Executive Tourism Director
jay.tusa@colliercountyfl.gov

Sandra Rios, Public Relations & Communications Manager
sandra.rios@colliercountyfl.gov

John Melleky, Arts & Culture Manager
john.melleky@colliercountyfl.gov

Downs & St. Germain Research
(850) 906-3111 | contact@dsg-research.com

Joseph St. Germain, President
joseph@dsg-research.com

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



A full-page background image showing a man and a woman standing on their surfboards (paddleboards) in the ocean. They are silhouetted against a bright sunset sky filled with large, dramatic clouds. The sun is low on the horizon, creating a warm orange and yellow glow. The woman is on the left, and the man is on the right, both holding paddles. A light blue rectangular box with a thin border is centered in the upper half of the image, containing the text 'THANK YOU' in a dark blue, sans-serif font.

THANK YOU