

# NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau  
January 2024 Monthly Dashboard





The Occupancy Rate decreased 5.2%, however, the total available supply of rooms increased by 17.9%.



Largely driven by a significant increase in Average Daily Rate (+17.0%) as well as the previously mentioned increase in the available supply of rooms, Direct Spending and Total Economic Impact increased 21.2% and 12.6%, respectively. One of the reasons for this increase is some luxury hotels that were closed in January 2023 were open in January 2024.



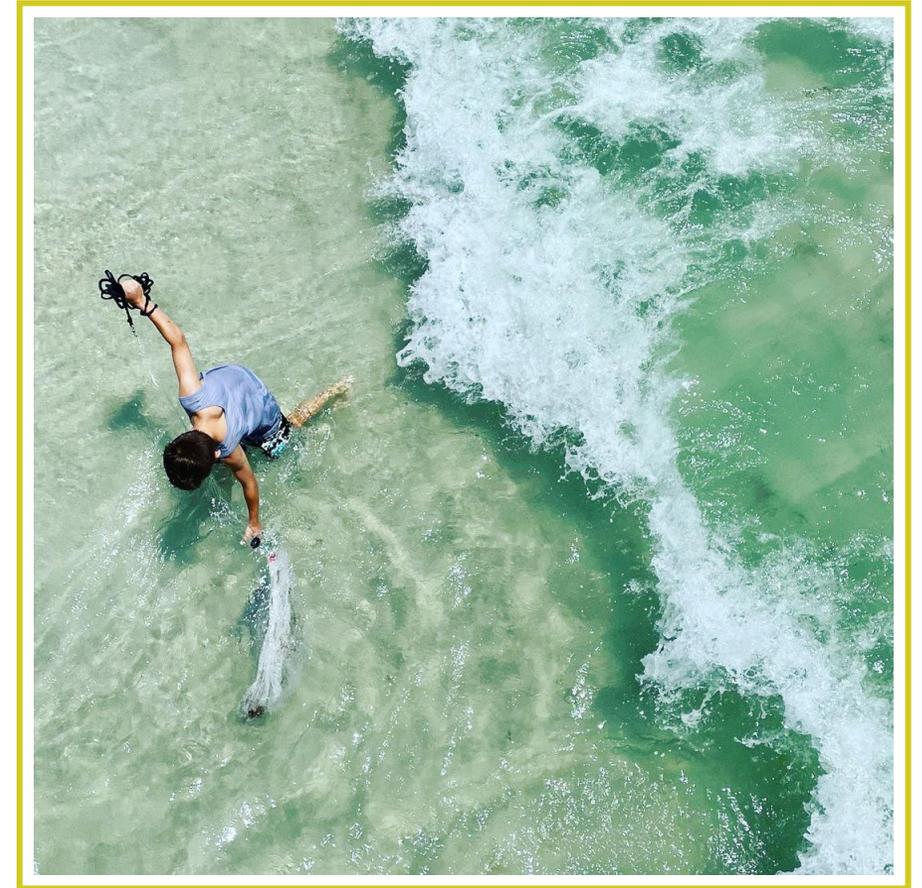
The decrease in length of stay was driven by an increase in day trippers, while length of stay for overnight visitors increased slightly.

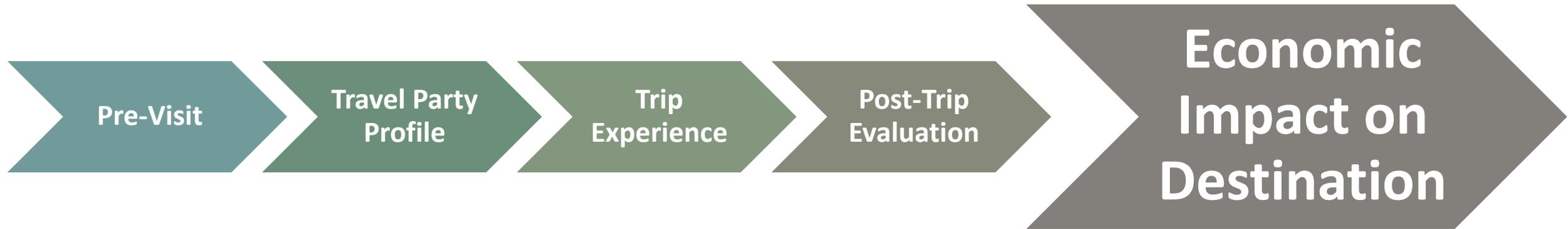


There was an increase in couples travelling resulting in a decrease of in the overall travel party size.



Visitors gave a value for travel dollar rating of 8.3, which again was a YOY increase, although it was a decrease from December's rating of 8.7.

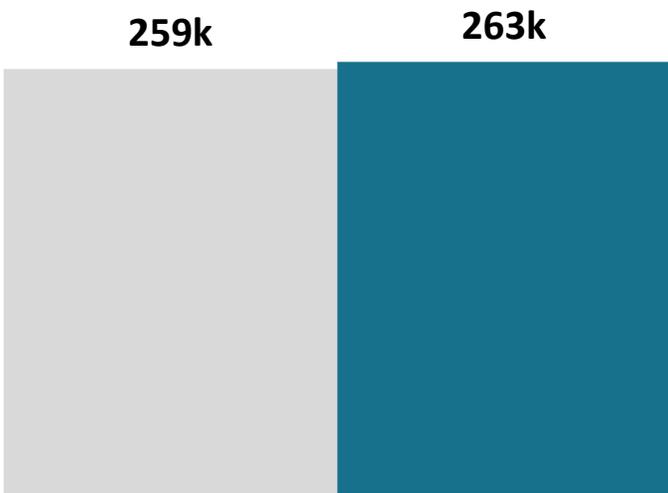




# JANUARY 2024 VISITATION & ROOM NIGHTS

## VISITORS

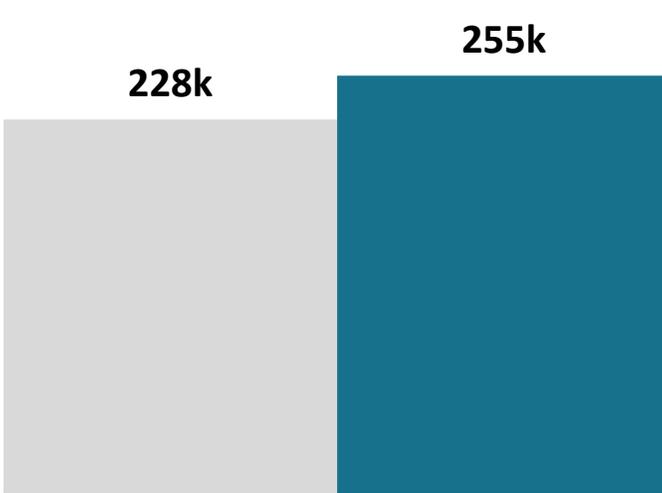
263,300



+ 1.7% from 2023

## ROOM NIGHTS

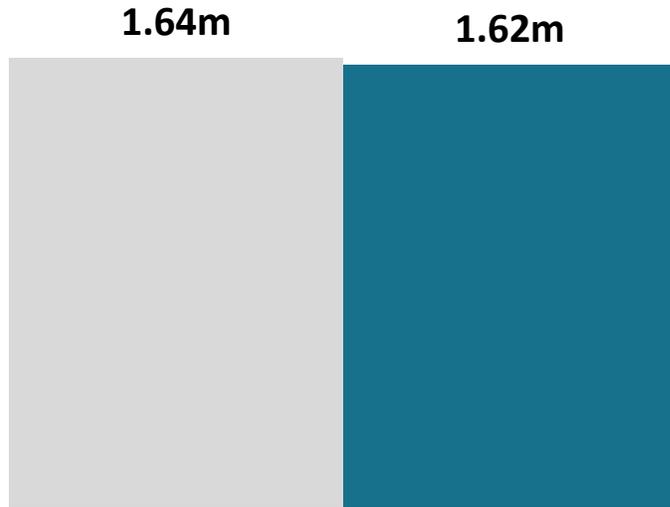
254,900



+ 11.7% from 2023

## VISITOR DAYS

1,619,300



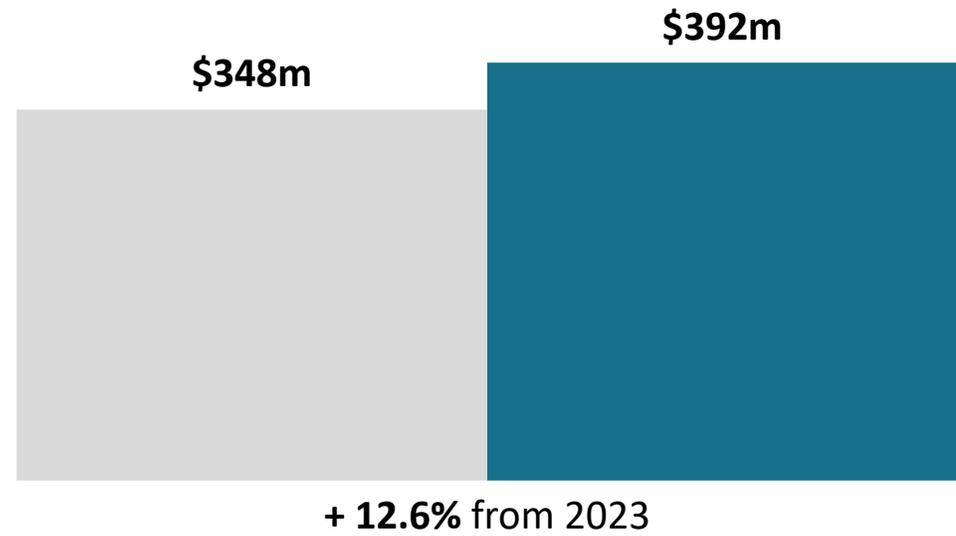
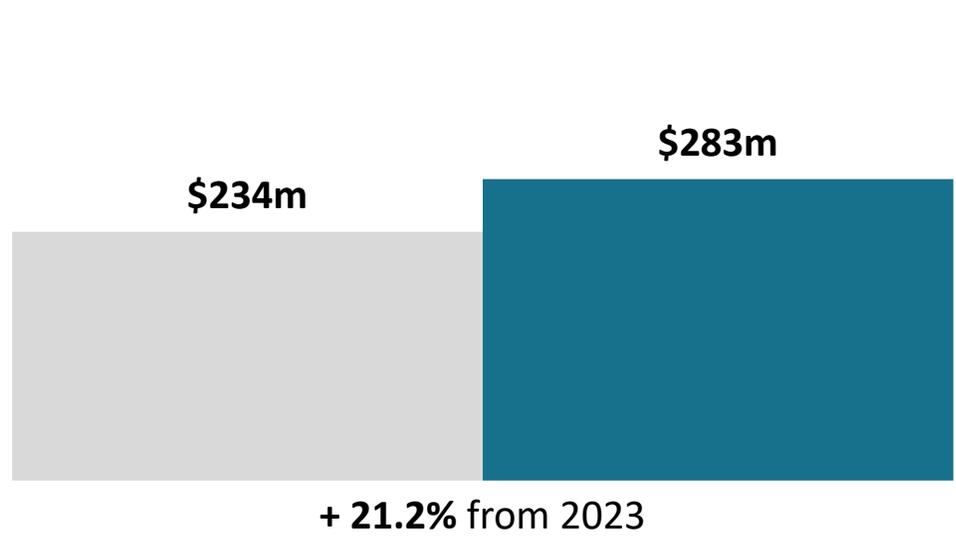
- 1.5% from 2023

■ Jan-23 ■ Jan-24

# JANUARY 2024 SPENDING & ECONOMIC IMPACT<sup>1</sup>

DIRECT SPENDING  
**\$283,099,500**

ECONOMIC IMPACT  
**\$392,375,900**



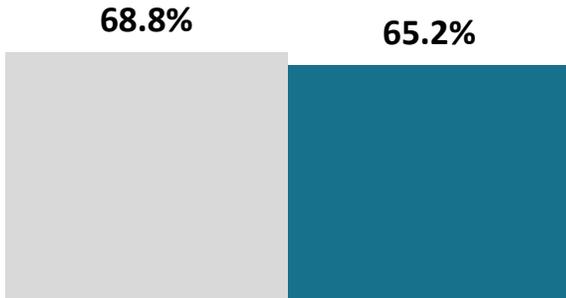
■ Jan-23   ■ Jan-24

<sup>1</sup>The IMPLAN multiplier for Collier County was 1.491 for 2023 and is 1.386 in 2024.

# JANUARY 2024 OVERALL LODGING METRICS<sup>1</sup>

## OCCUPANCY RATE

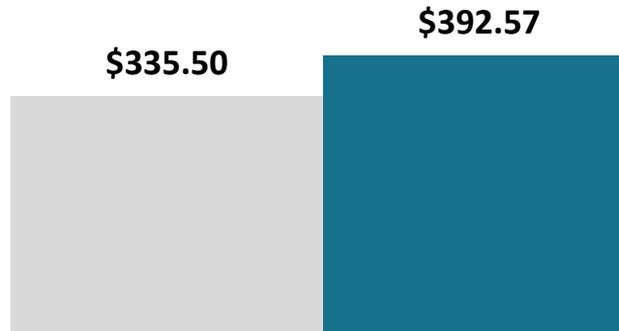
65.2%



- 5.2% from 2023

## AVERAGE DAILY RATE

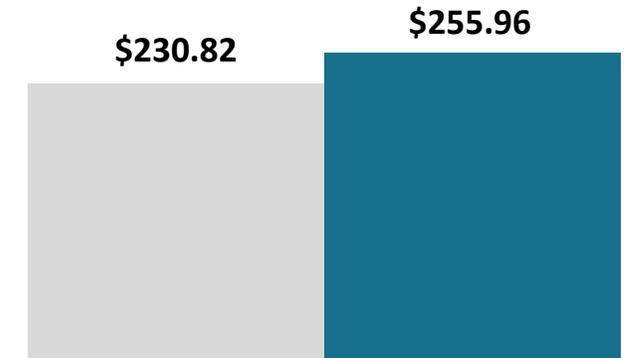
\$392.57



+ 17.0% from 2023

## REVENUE PER AVAILABLE ROOM

\$255.96



+ 10.9% from 2023

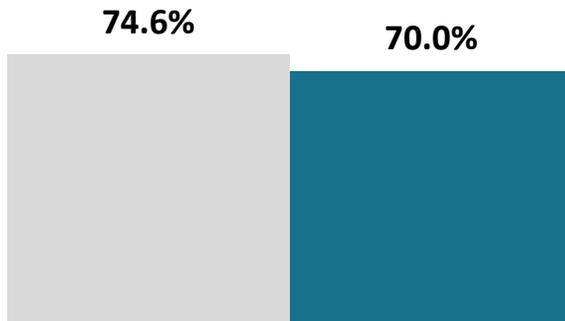
■ Jan-23   ■ Jan-24

<sup>1</sup> Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

# JANUARY 2024 HOTEL LODGING METRICS<sup>1</sup>

## OCCUPANCY RATE

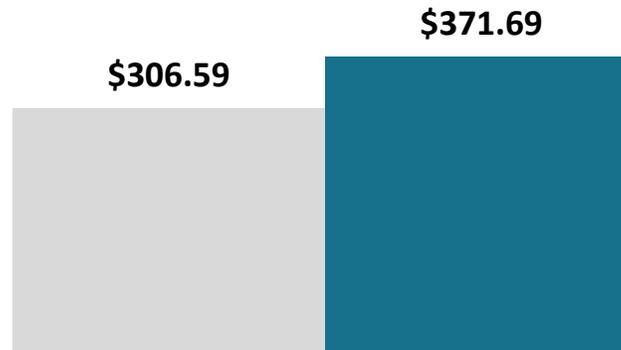
70.0%



- 6.2% from 2023

## AVERAGE DAILY RATE

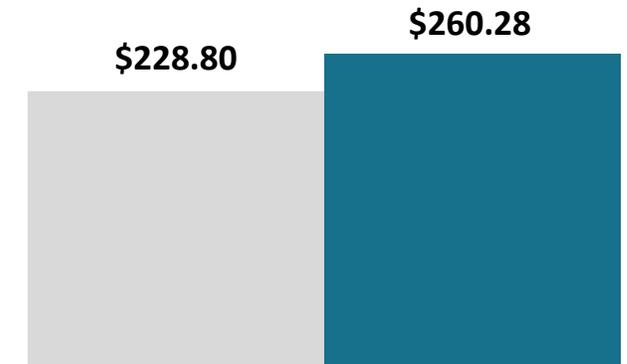
\$371.69



+ 21.2% from 2023

## REVENUE PER AVAILABLE ROOM

\$260.28

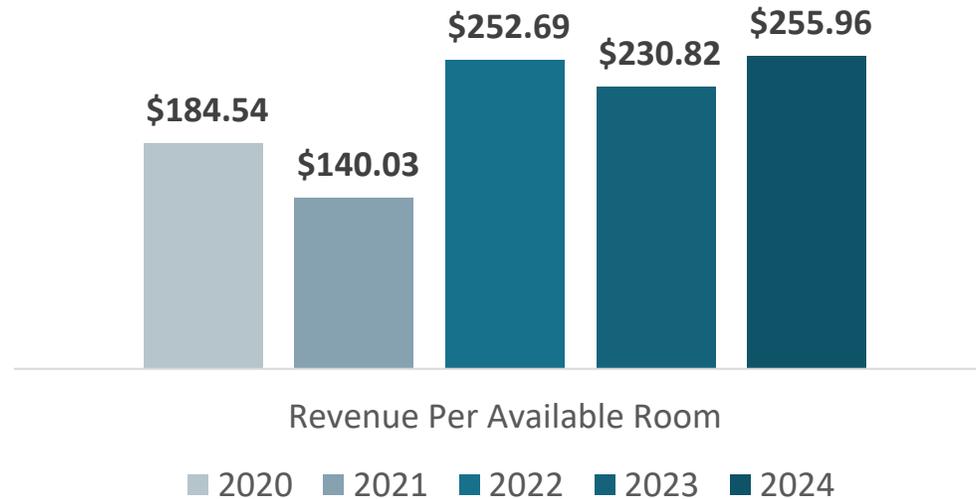
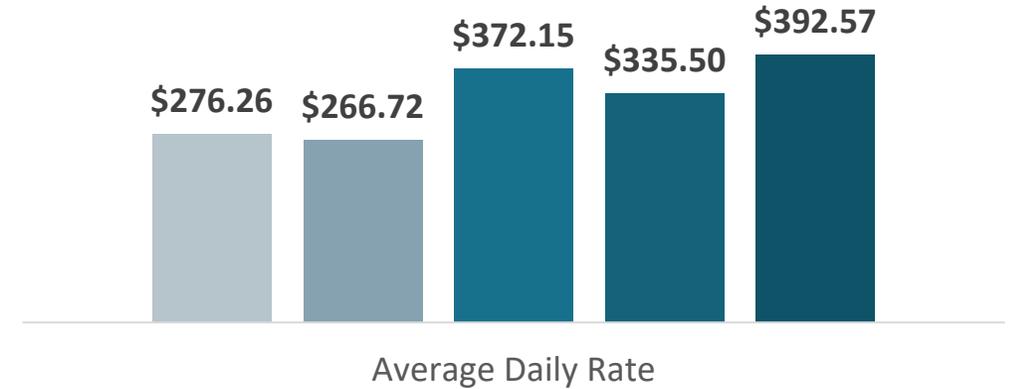
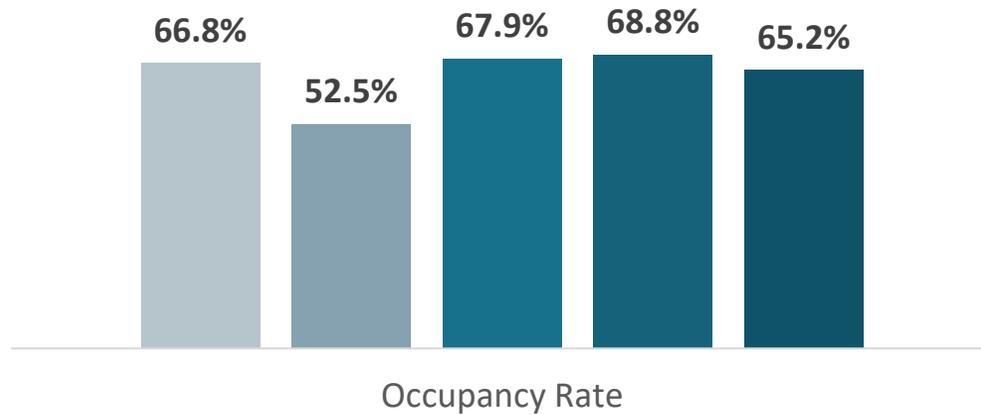


+ 13.8% from 2023

■ Jan-23   ■ Jan-24

<sup>1</sup>Source: STR Reports

# JANUARY 2020-2024 OVERALL LODGING METRICS<sup>1</sup>



<sup>1</sup> Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

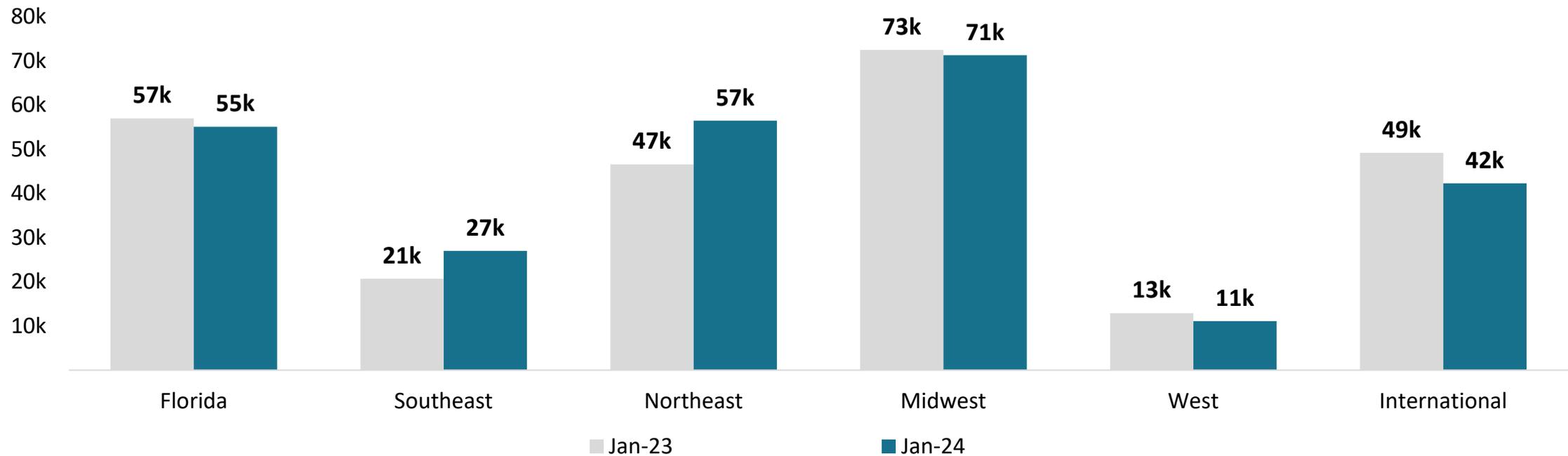
# VISITOR ORIGIN

## FLORIDA VISITORS

54,800

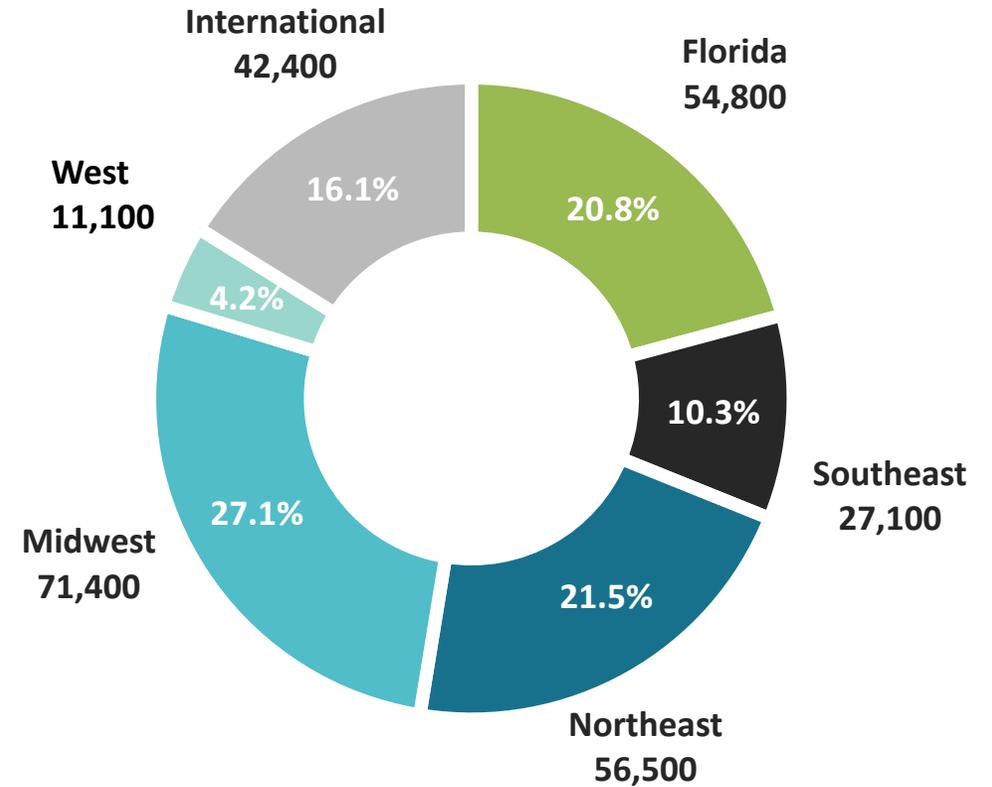
## OUT-OF-STATE VISITORS

208,500

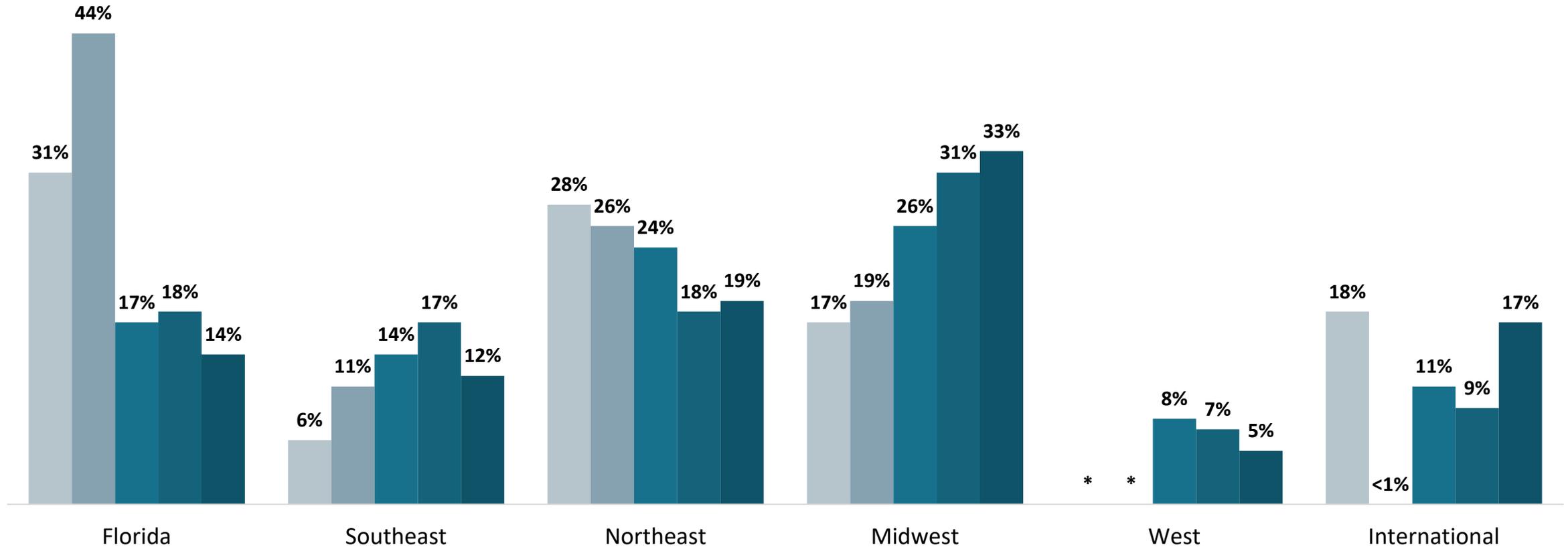


# VISITOR ORIGIN MARKETS

| Region       | JAN 2023       |               | JAN 2024       |               | Percent Change (Δ%) |           |
|--------------|----------------|---------------|----------------|---------------|---------------------|-----------|
|              | # Visitors     | Mkt Share     | # Visitors     | Mkt Share     | # Visitors          | Mkt Share |
| Florida      | 57,000         | 21.7%         | 54,800         | 20.8%         | -3.3%               | -4.1%     |
| Southeast    | 20,700         | 8.5%          | 27,100         | 10.3%         | +30.4%              | +21.2%    |
| Northeast    | 46,600         | 18.1%         | 56,500         | 21.5%         | +21.2%              | +18.8%    |
| Midwest      | 72,500         | 27.7%         | 71,400         | 27.1%         | -1.7%               | -2.2%     |
| West         | 12,900         | 4.8%          | 11,100         | 4.2%          | -14.0%              | -12.5%    |
| Canada       | 18,100         | 6.9%          | 14,500         | 5.5%          | -20.4%              | -20.3%    |
| Europe       | 23,300         | 8.6%          | 21,100         | 8.0%          | -9.9%               | -7.0%     |
| C/S America  | 5,200          | 2.5%          | 3,900          | 1.5%          | -23.1%              | -40.0%    |
| Other        | 2,600          | 1.3%          | 2,900          | 1.1%          | +11.5%              | -15.4%    |
| <b>Total</b> | <b>258,900</b> | <b>100.0%</b> | <b>263,300</b> | <b>100.0%</b> |                     |           |

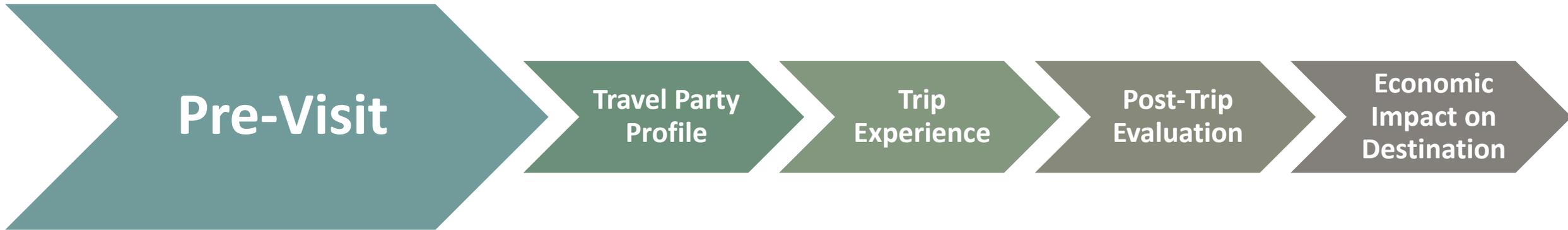


# JANUARY 2019-2024 OVERNIGHT VISITOR ORIGIN

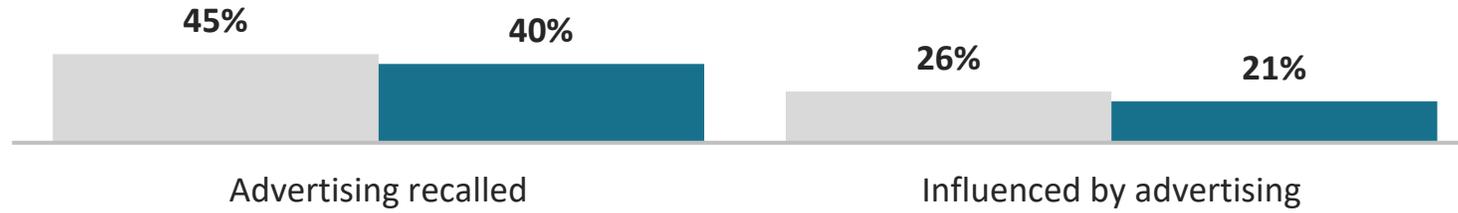


\*Note: The "West" was not separated from "Other" before January 2022. Beginning in January 2022, "West" was added and "Other" was changed to "Other International".

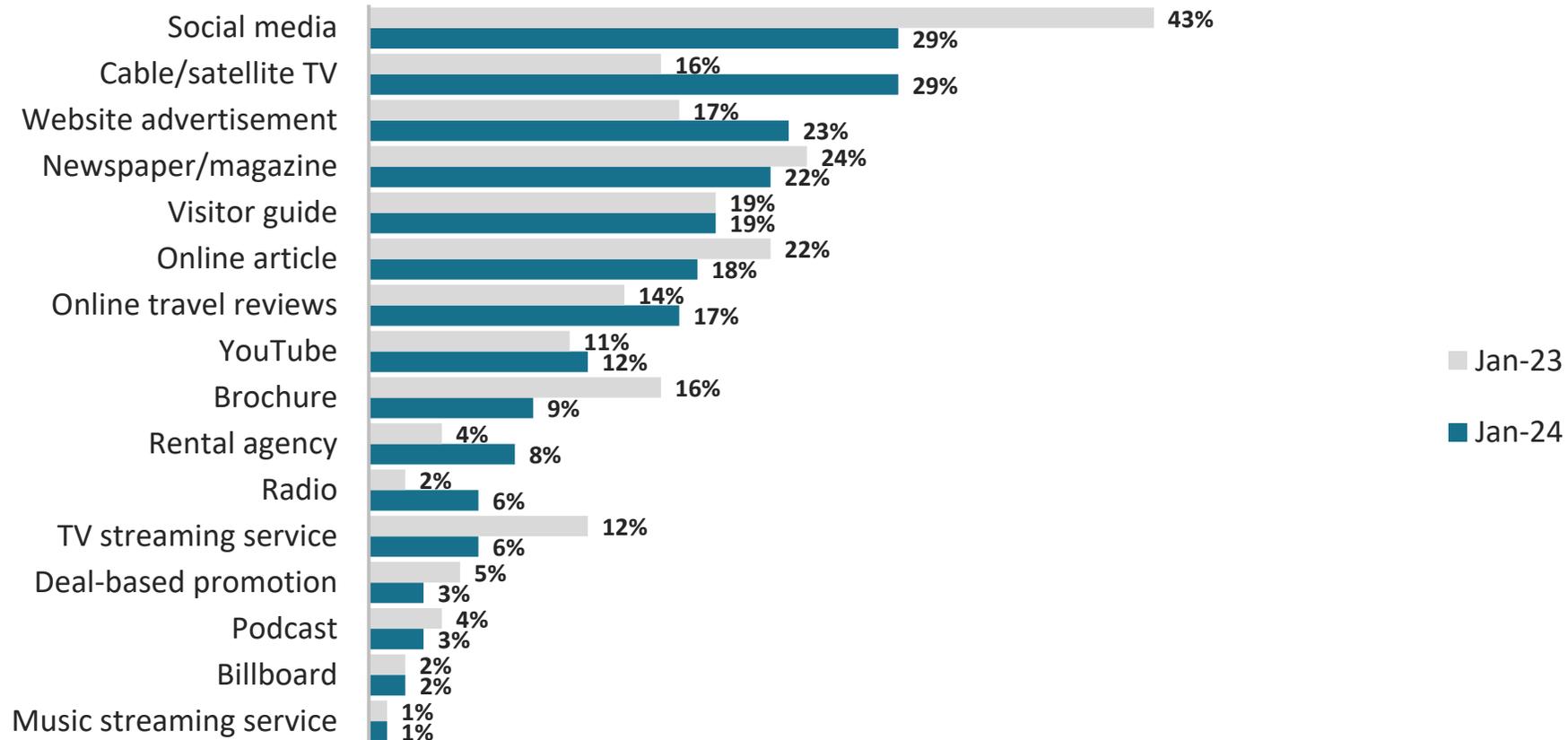
■ Jan-20 ■ Jan-21 ■ Jan-22 ■ Jan-23 ■ Jan-24



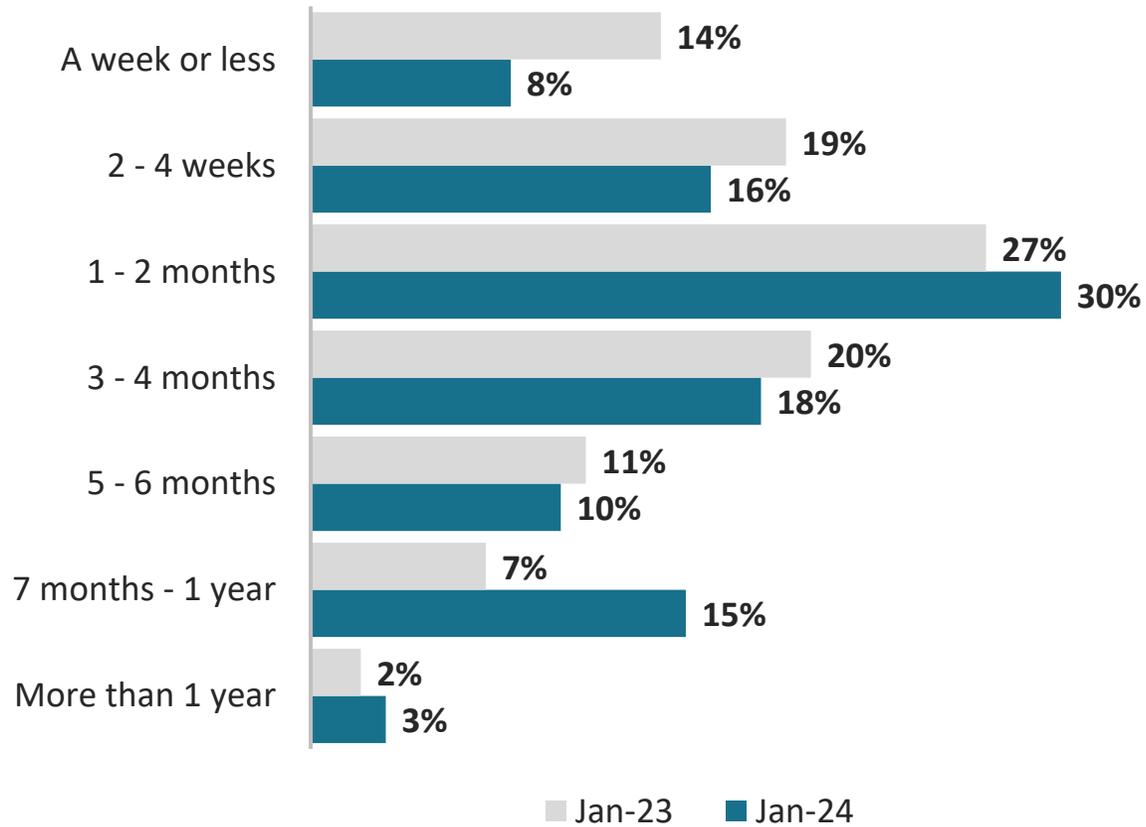
# ADVERTISING RECALL<sup>1</sup>



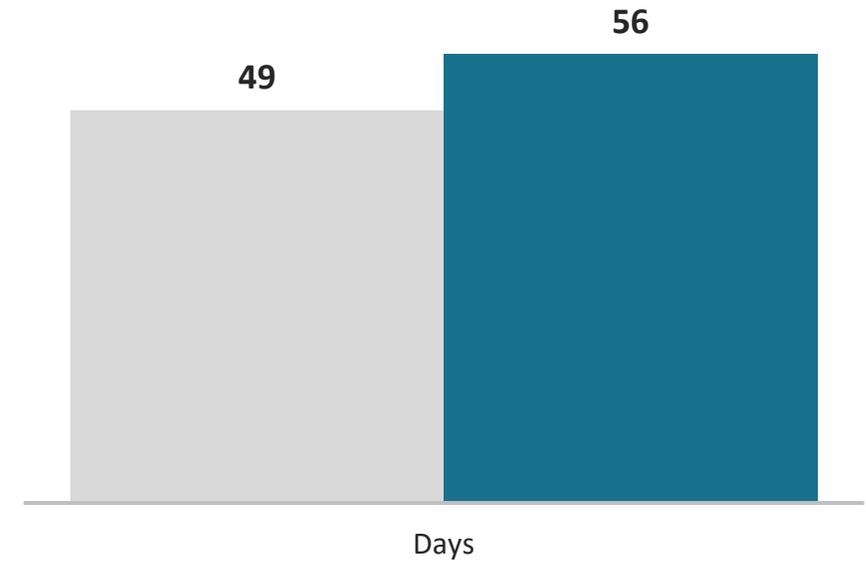
Base: % who recalled ads prior to their trip



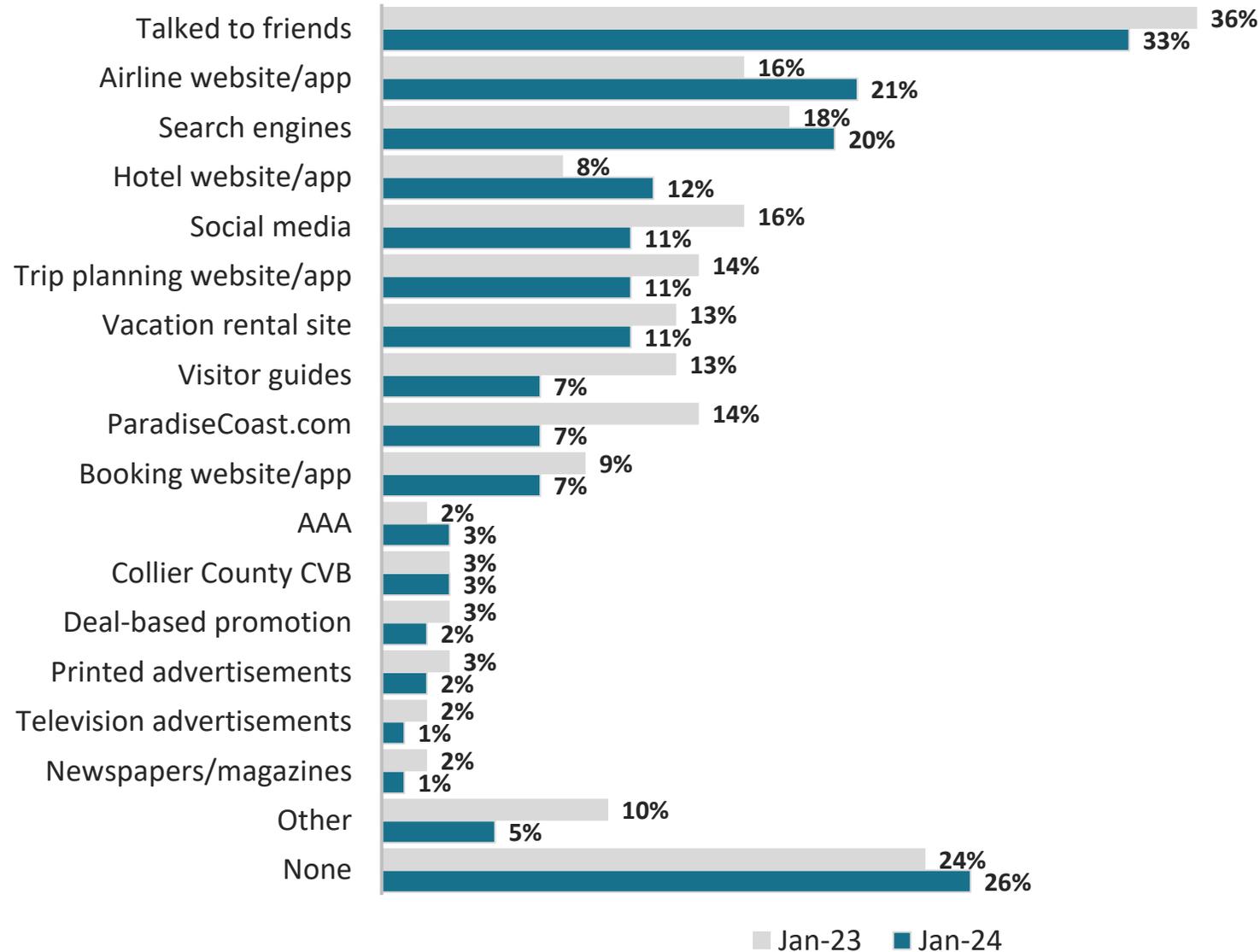
# TRIP PLANNING CYCLE<sup>1</sup>



## Median Trip Planning Time

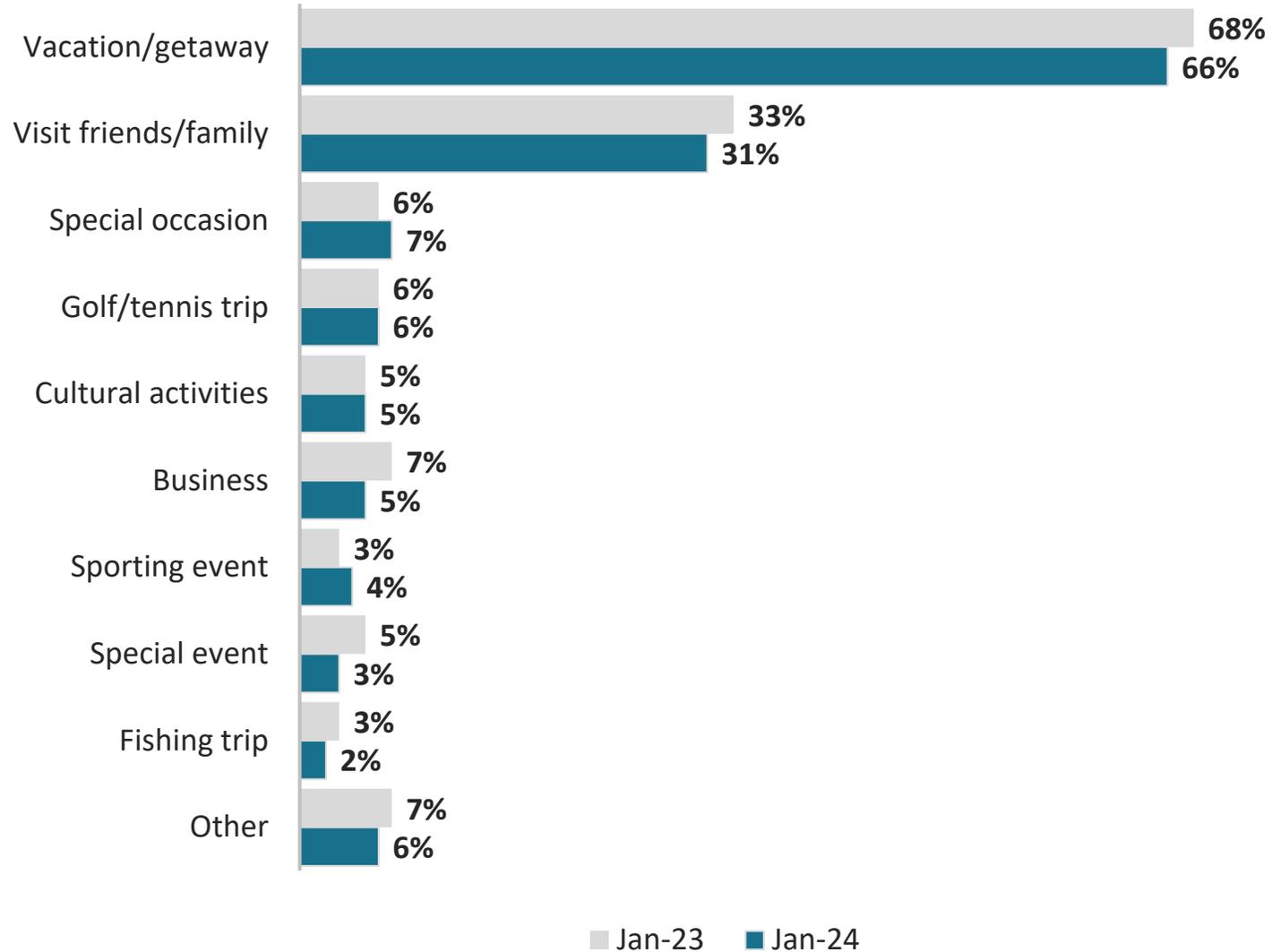


# TRIP PLANNING SOURCES<sup>1</sup>



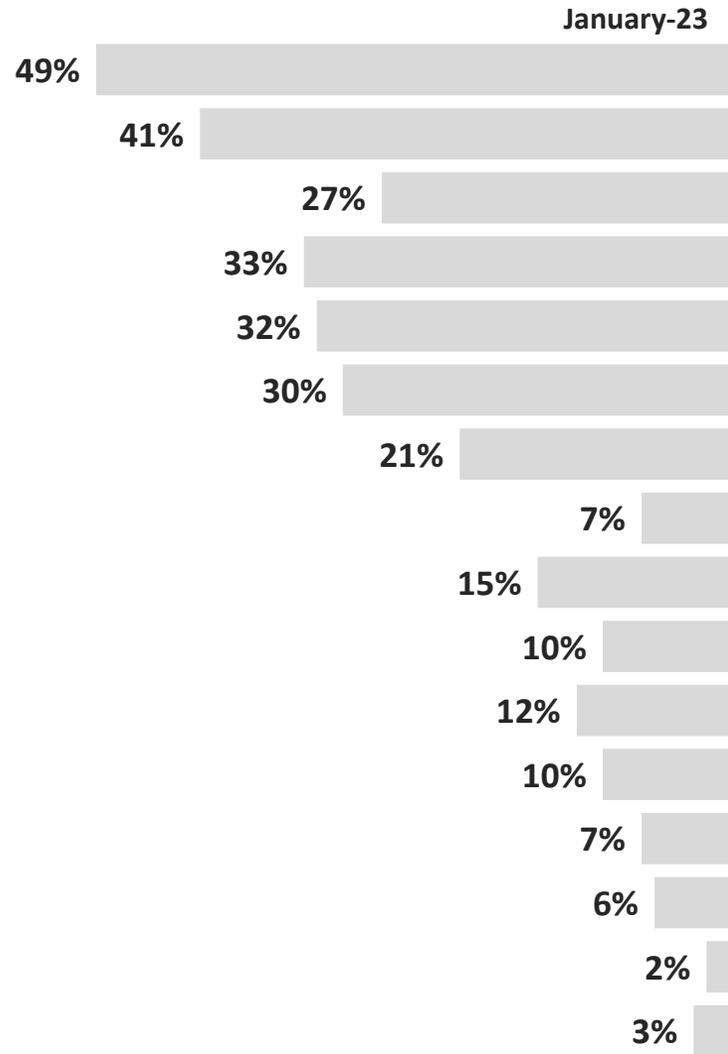
<sup>1</sup> Multiple responses permitted.

# REASONS FOR VISITING<sup>1</sup>

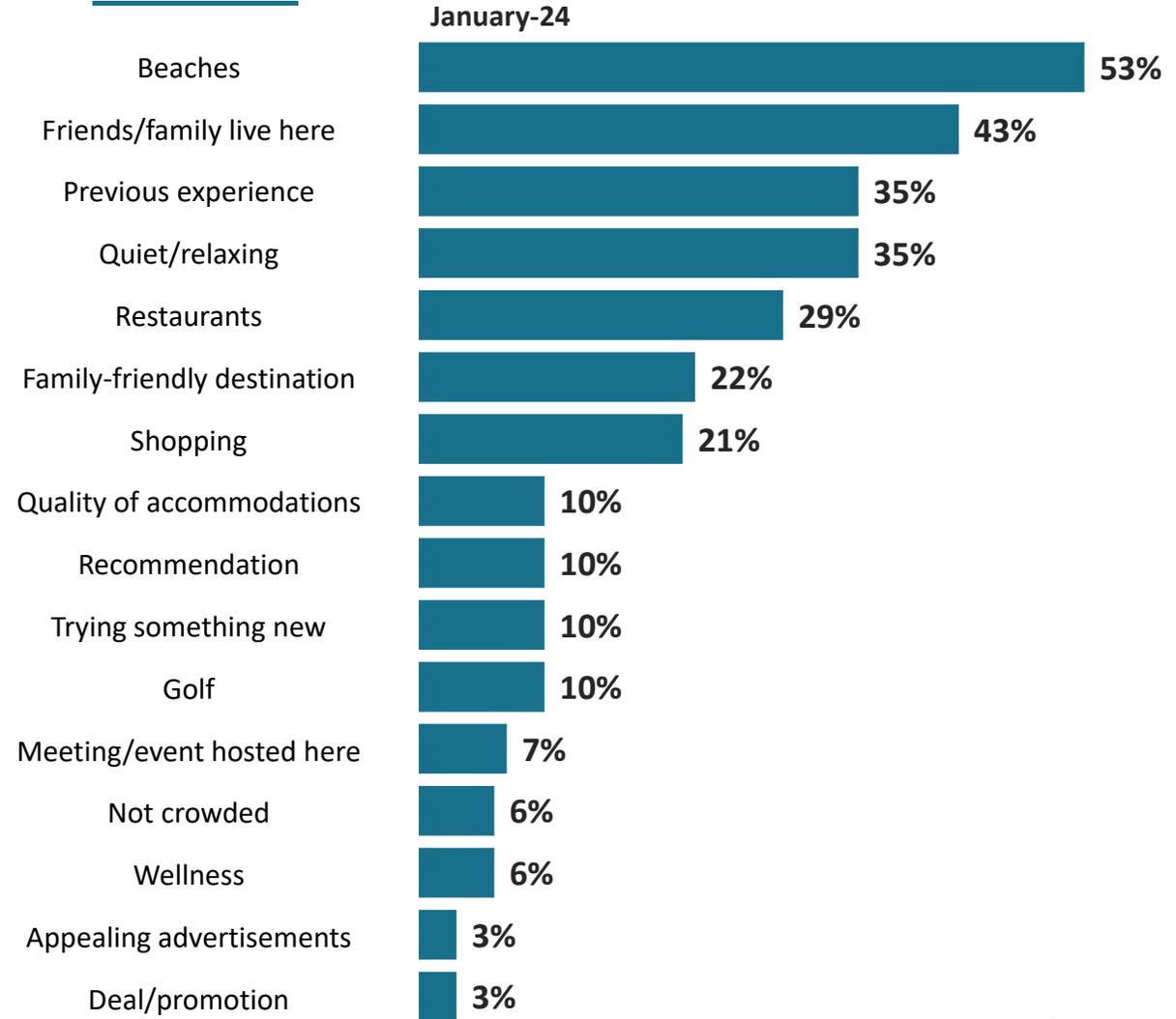


<sup>1</sup> Multiple responses permitted.

# REASONS FOR CHOOSING AREA<sup>1</sup>

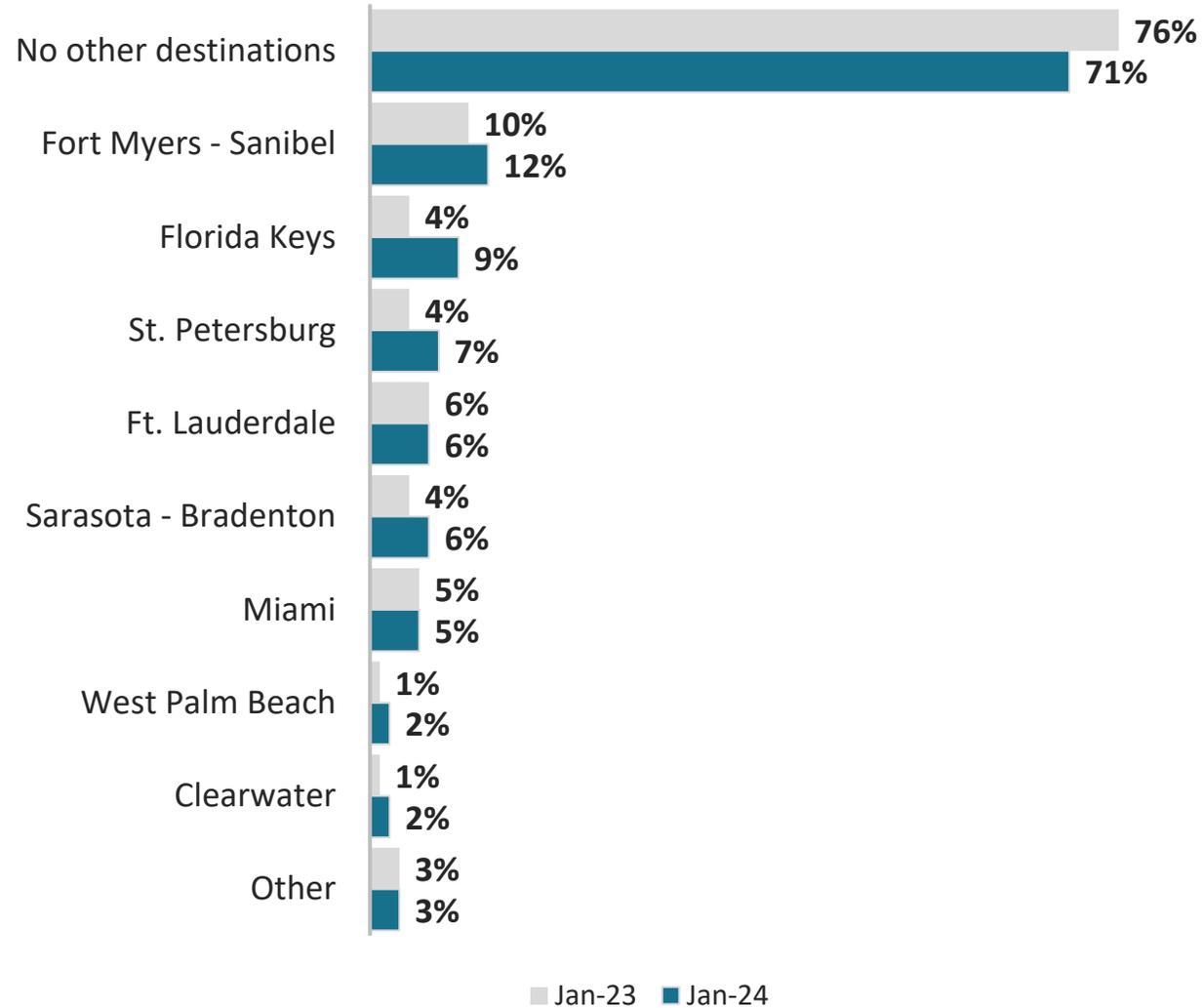


## Reasons



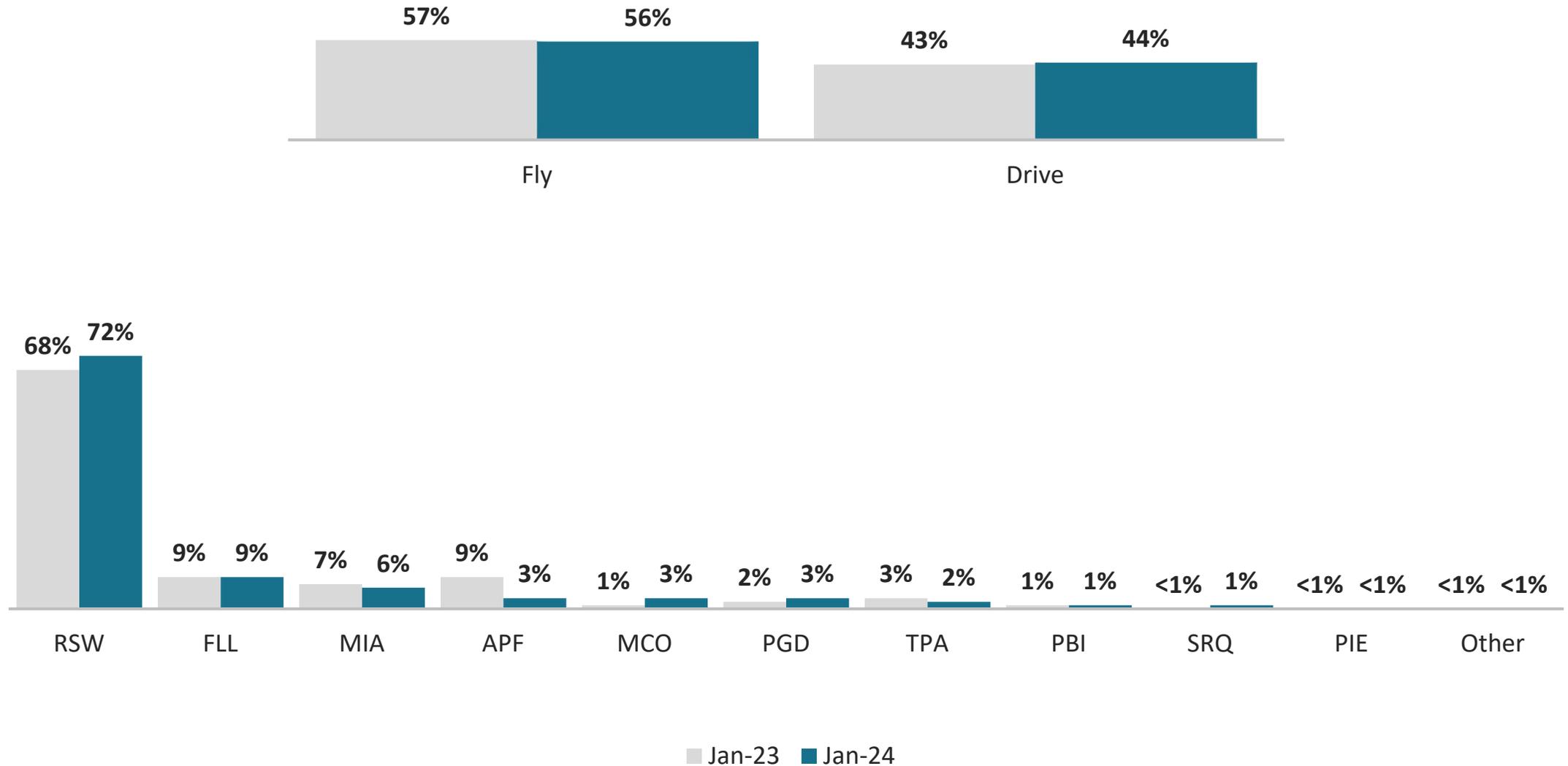
<sup>1</sup> Multiple responses permitted.

# OTHER DESTINATIONS CONSIDERED<sup>1</sup>

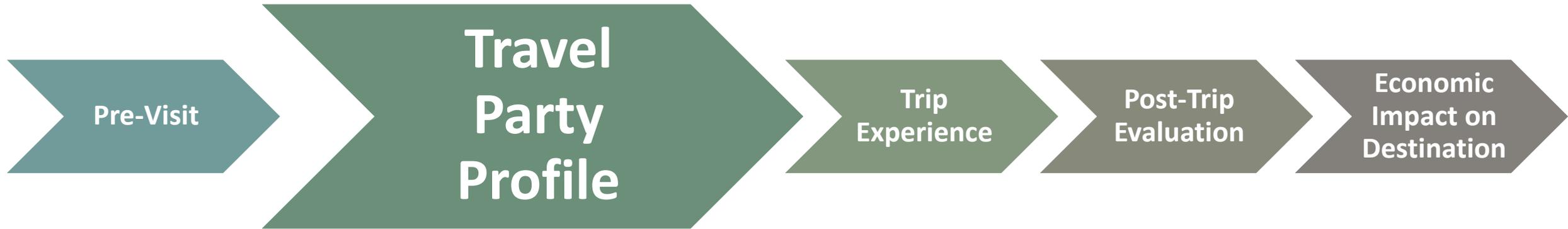


<sup>1</sup> Multiple responses permitted.

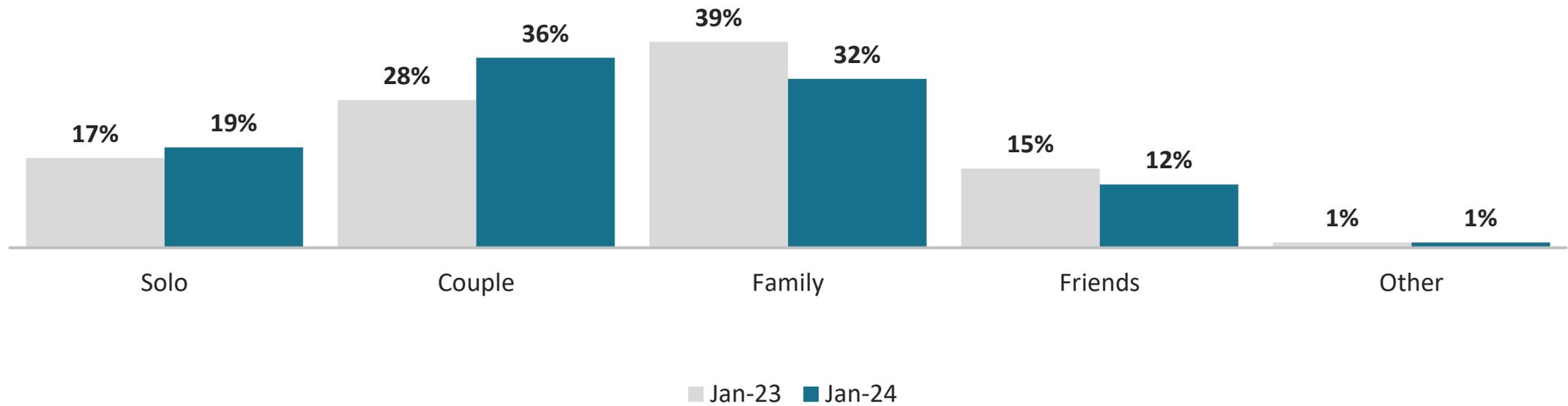
# TRANSPORTATION METHODS



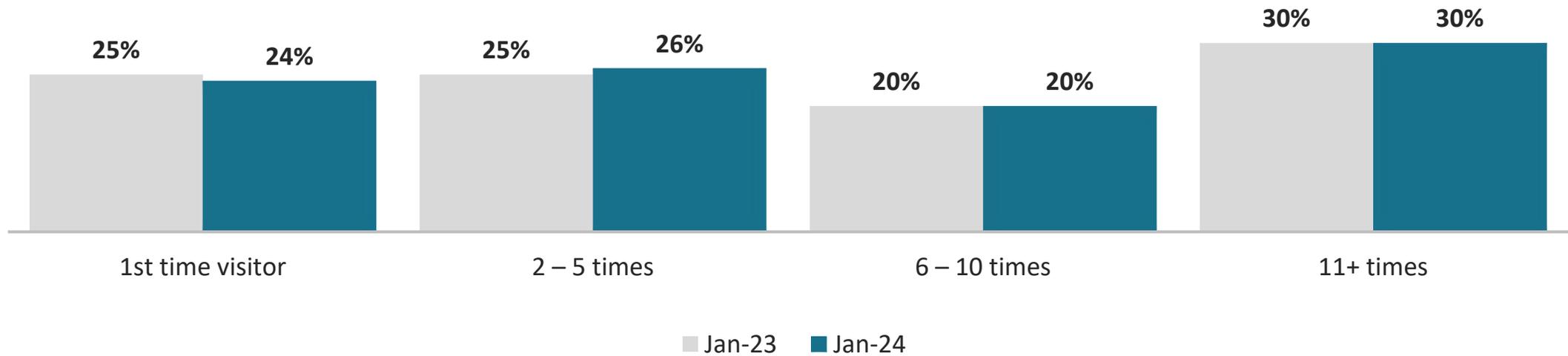
# VISITOR JOURNEY: TRAVEL PARTY PROFILE



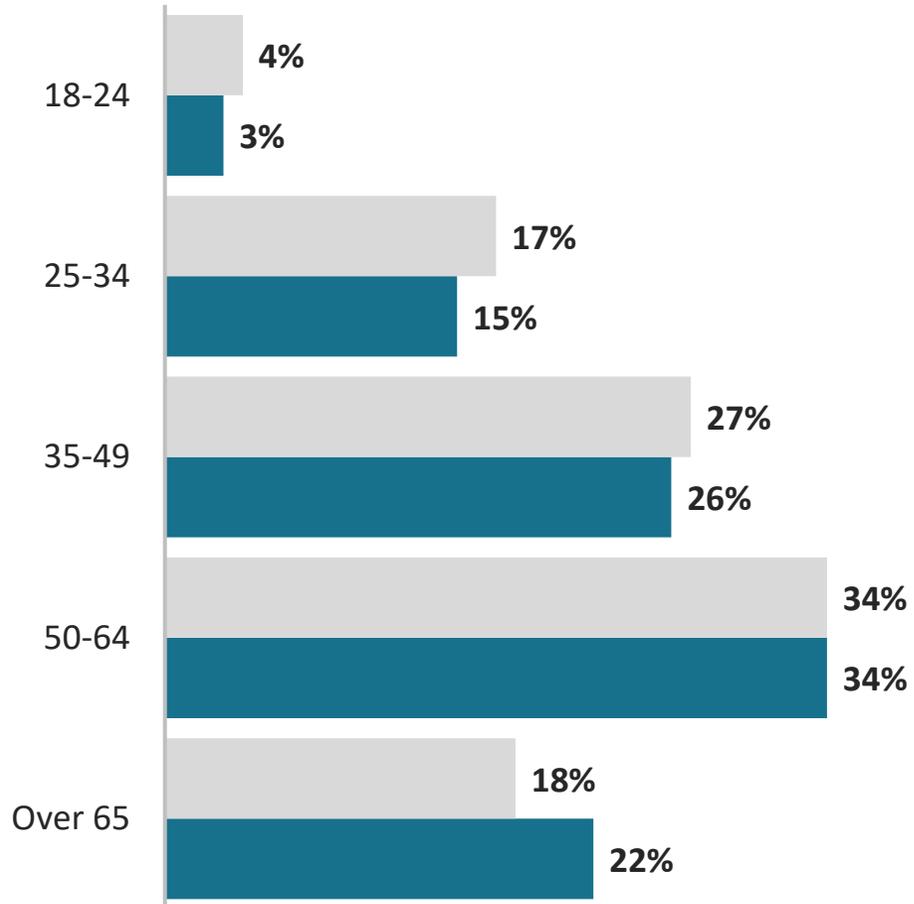
## TRAVEL PARTY COMPOSITION



# PREVIOUS VISITS

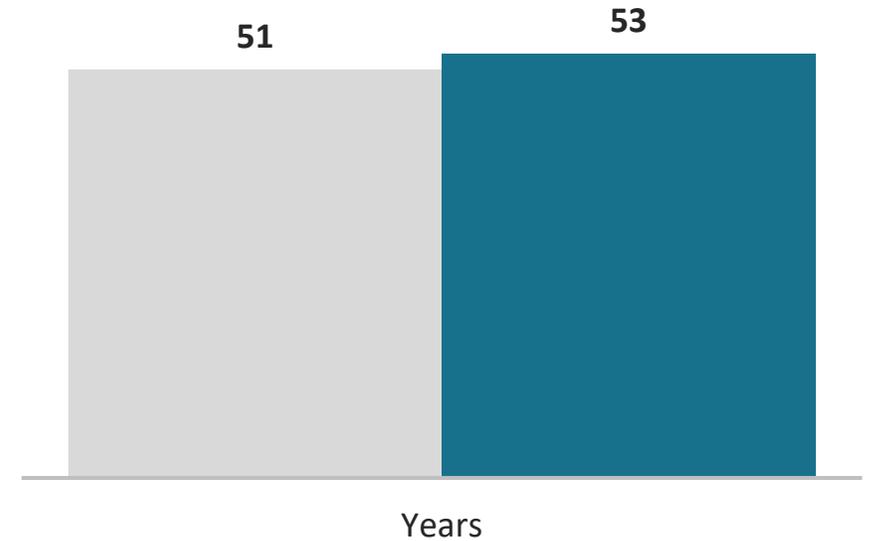


## Age



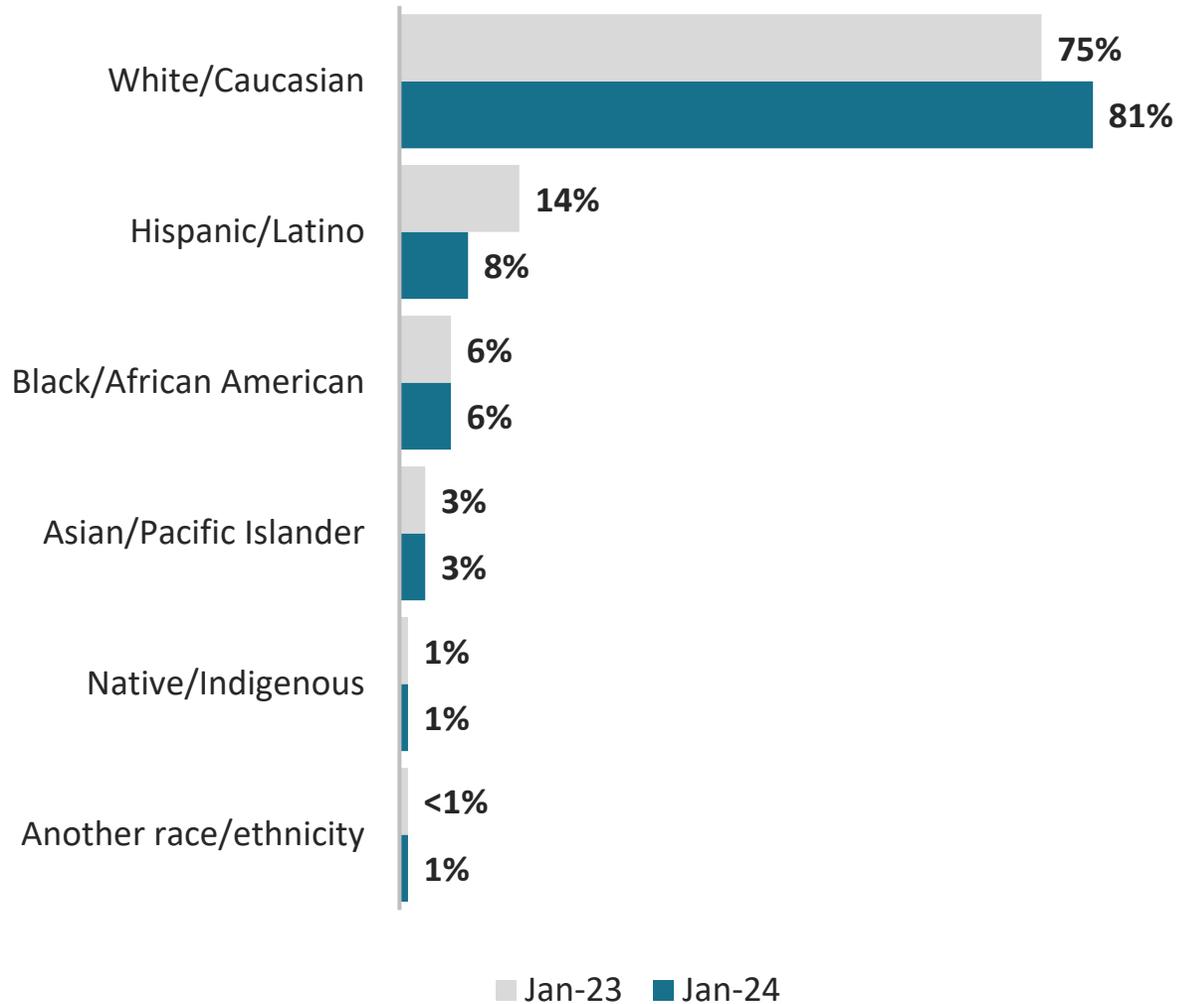
■ Jan-23 ■ Jan-24

## Median Age

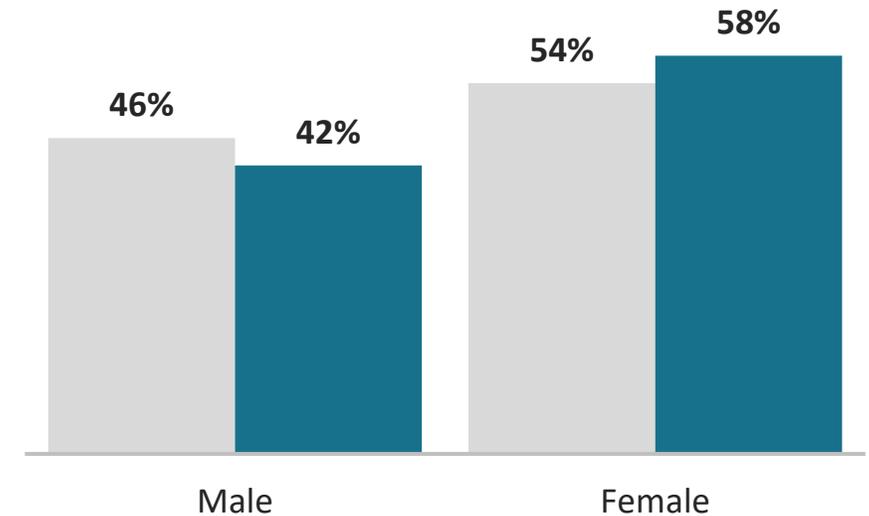


# VISITOR RACE & GENDER<sup>1</sup>

## Race

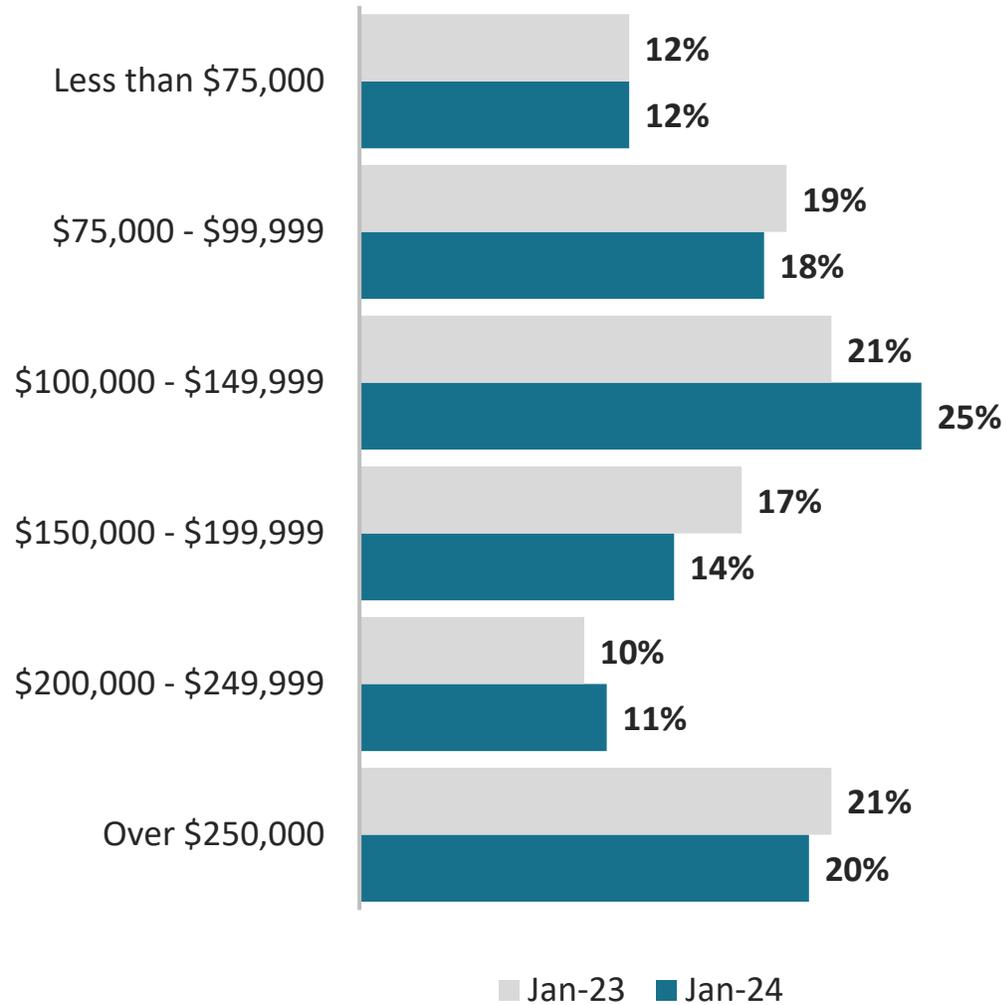


## Gender

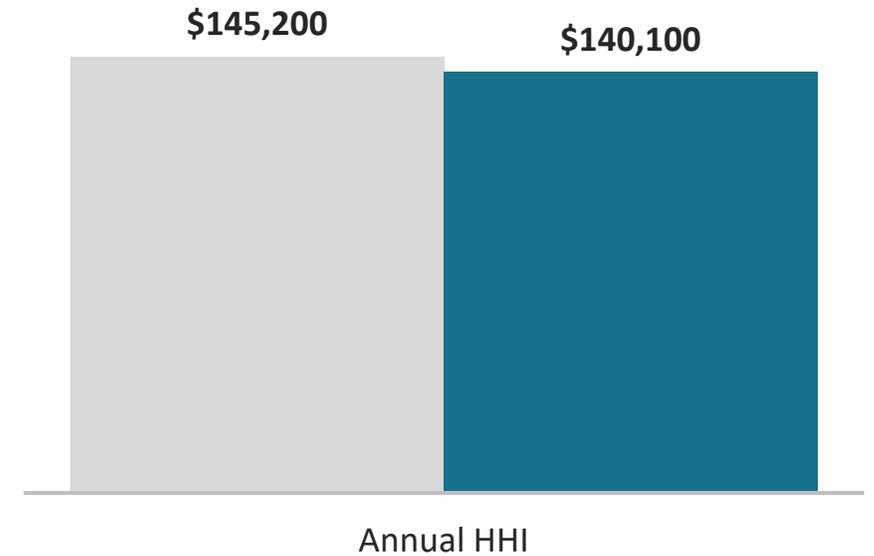


<sup>1</sup>Of person interviewed. Females are generally more likely to agree to participate in survey research.

## Income



## Median Household Income

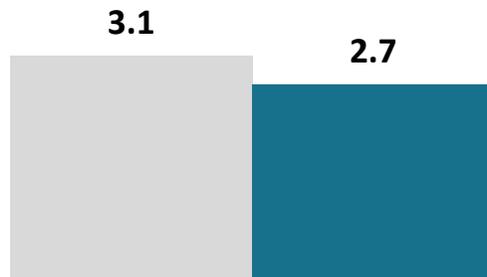


# VISITOR JOURNEY: TRIP EXPERIENCE



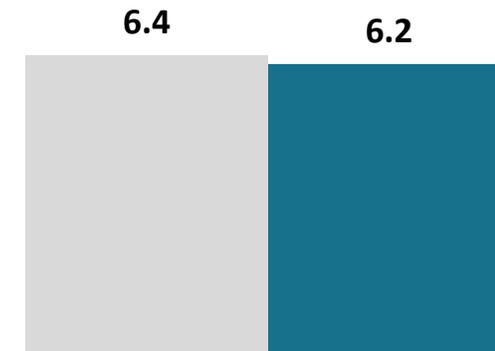
## TRAVEL PARTY SIZE

2.7



## NIGHTS STAYED<sup>1</sup>

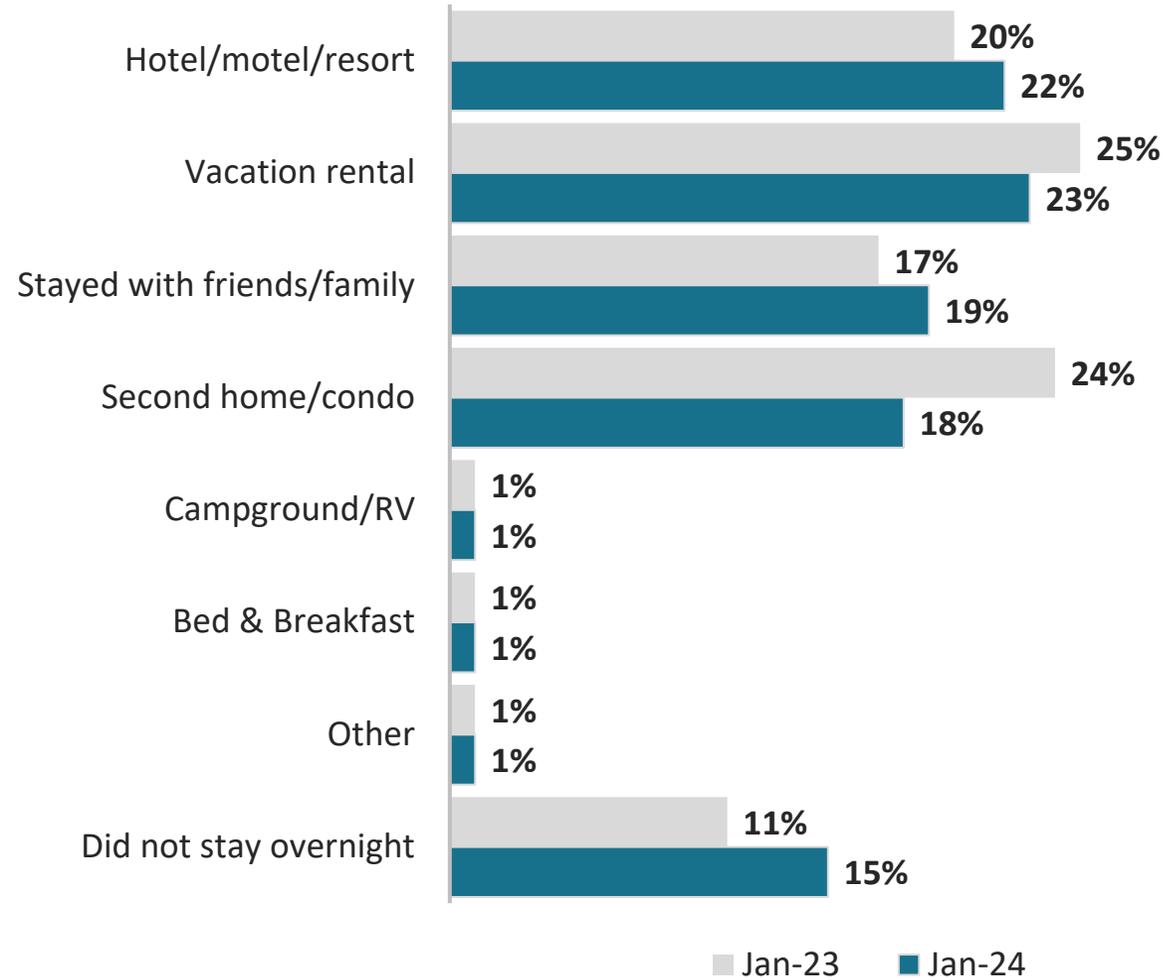
6.2



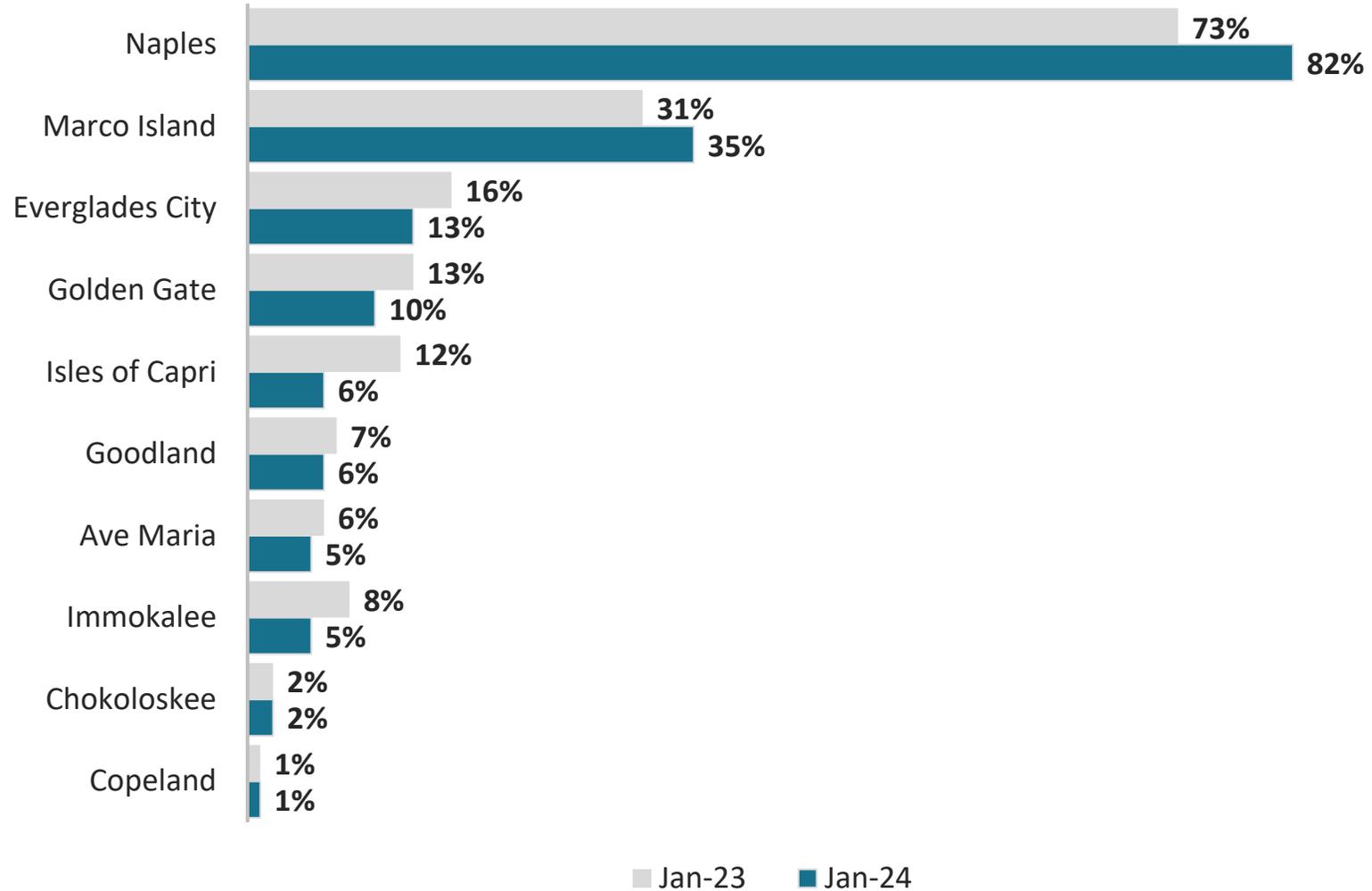
■ Jan-23 ■ Jan-24

<sup>1</sup> Overall length of stay decreased due to an increase in the number of daytrippers, while the length of stay for overnight visitors actually increased slightly.

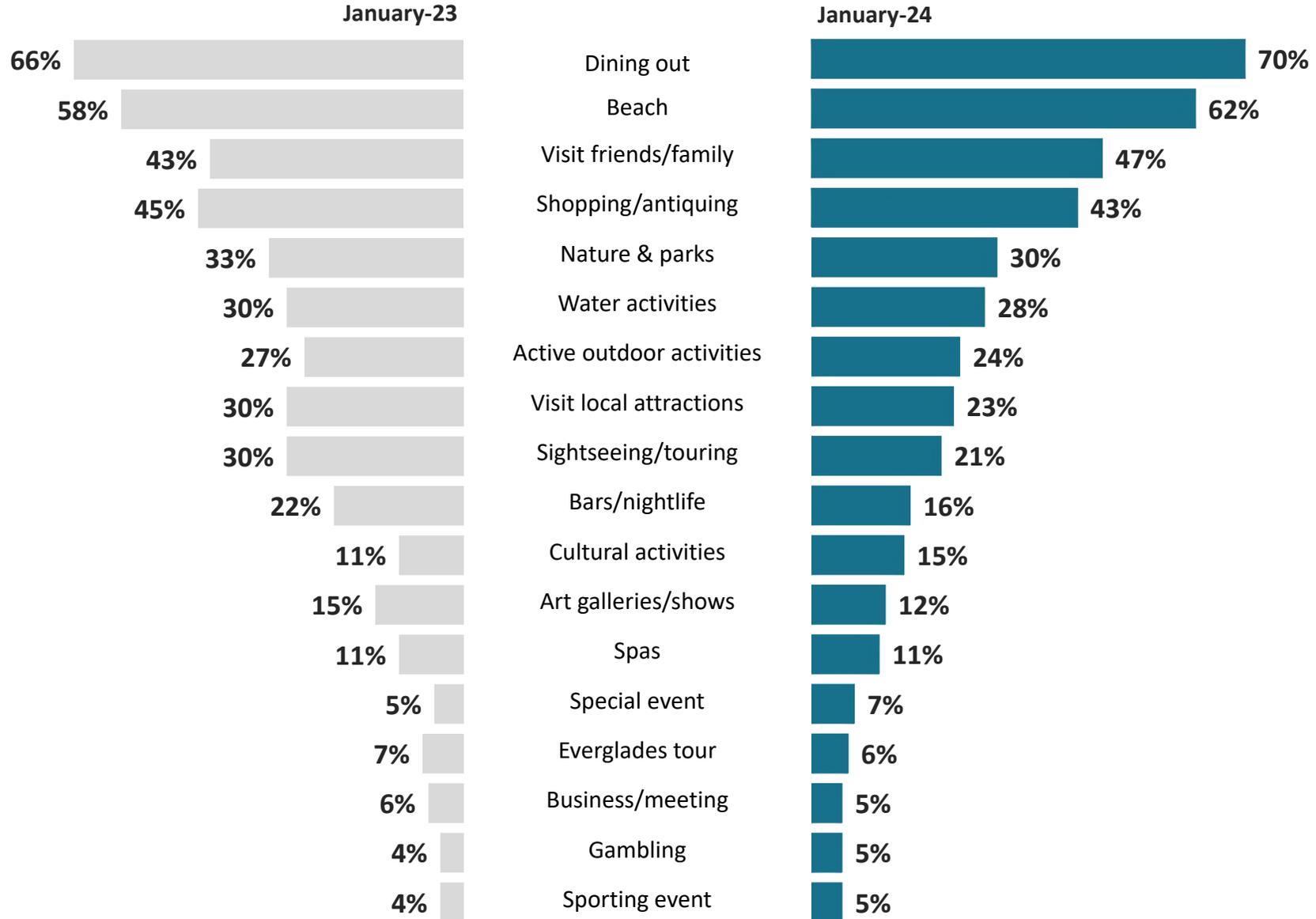
# TYPE OF ACCOMMODATIONS



# AREAS VISITED

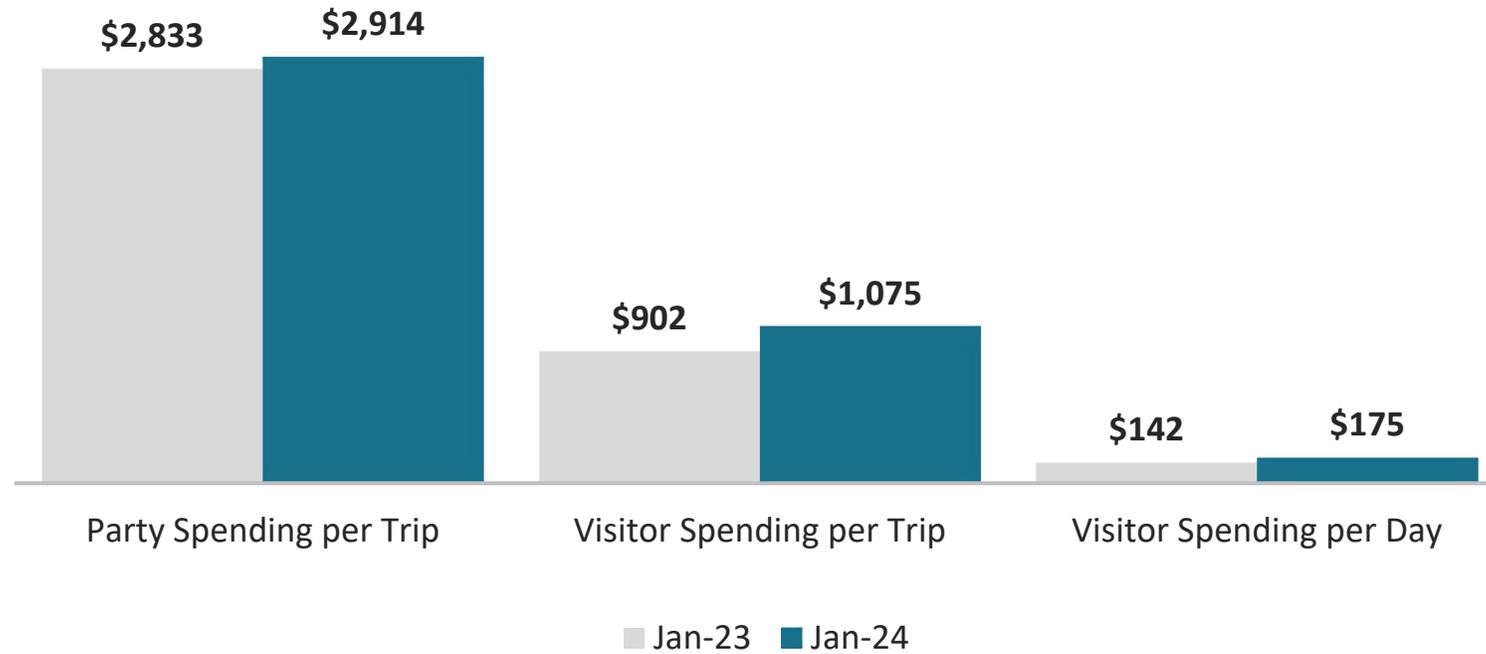


# TRIP ACTIVITIES



<sup>1</sup> Multiple responses permitted.

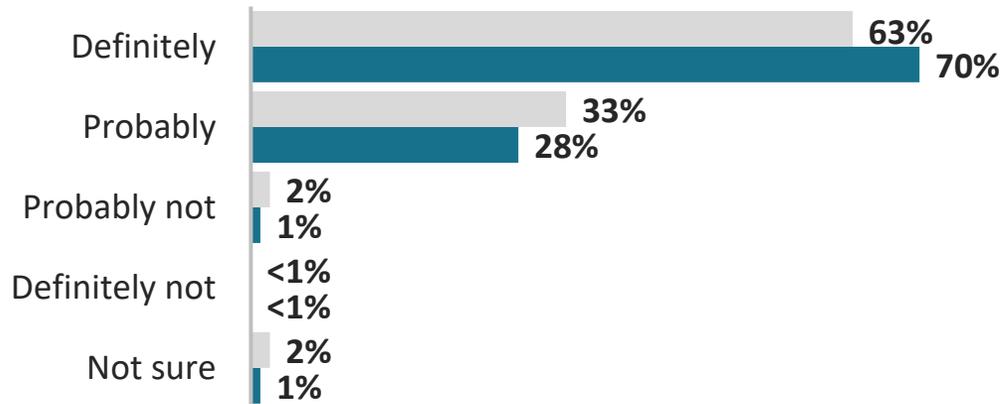
# VISITOR SPENDING



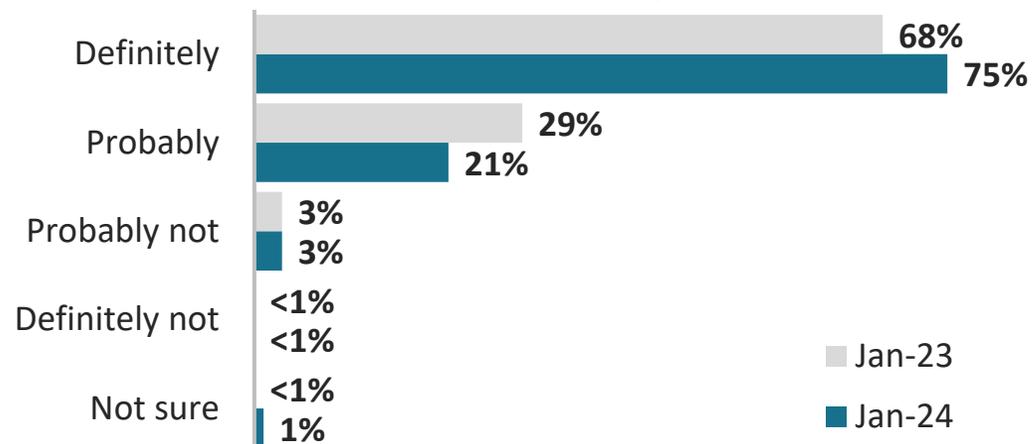
# VISITOR JOURNEY: POST-TRIP EVALUATION



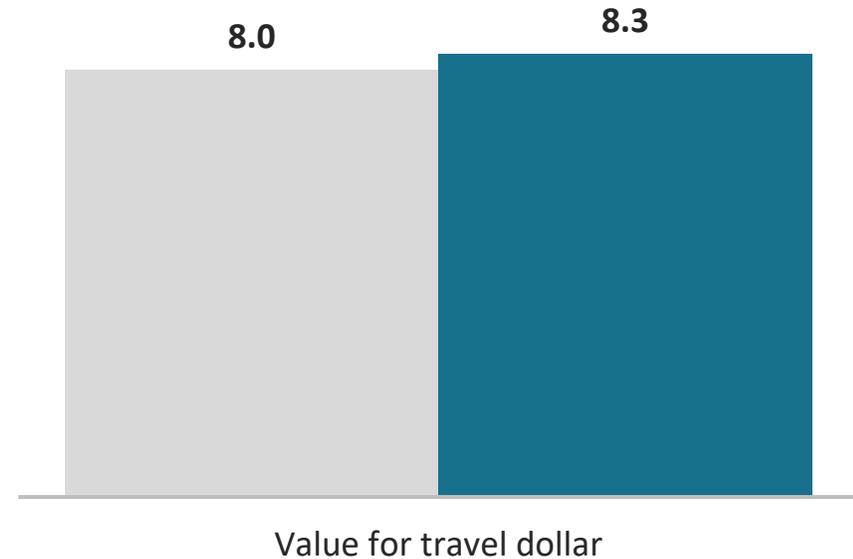
## Will recommend the Naples area?



## Will return to the Naples area?



## VALUE FOR TRAVEL DOLLAR<sup>1,2</sup>



<sup>1</sup> 10-point scale where 10 is "excellent" and 1 is "poor".  
<sup>2</sup> 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  
January 2024 Monthly Dashboard



# DESTINATION COMPARISONS



# OCCUPANCY COMPARISONS<sup>1</sup>

|                | Occupancy Rate (%)     |                    |                       |       | Demand (Thousands of Rooms) |                    |                       |          | Δ% from Jan 2023       |                    |                       |       |
|----------------|------------------------|--------------------|-----------------------|-------|-----------------------------|--------------------|-----------------------|----------|------------------------|--------------------|-----------------------|-------|
|                | Transient <sup>2</sup> | Group <sup>3</sup> | Contract <sup>4</sup> | Total | Transient <sup>2</sup>      | Group <sup>3</sup> | Contract <sup>4</sup> | Total    | Transient <sup>2</sup> | Group <sup>3</sup> | Contract <sup>4</sup> | Total |
| Naples         | 42.6%                  | 27.3%              | 0.1%                  | 70.0% | 97.33                       | 62.43              | 00.17                 | 159.92   | -16.1%                 | +16.1%             | -73.3%                | -6.2% |
| Miami          | 59.0%                  | 15.0%              | 4.4%                  | 78.5% | 1,200.68                    | 305.45             | 90.17                 | 1,596.30 | +5.0%                  | +1.2%              | -1.2%                 | +3.9% |
| Florida Keys   | 64.5%                  | 13.9%              | 0.2%                  | 78.7% | 211.70                      | 45.68              | 00.68                 | 258.06   | -3.5%                  | +0.9%              | -11.5%                | -2.8% |
| Fort Myers     | 50.2%                  | 16.4%              | 6.1%                  | 72.7% | 178.09                      | 58.32              | 21.49                 | 257.89   | -7.4%                  | -18.5%             | +38.0%                | -7.7% |
| Sarasota       | 48.0%                  | 17.7%              | 3.7%                  | 69.3% | 185.15                      | 68.17              | 14.31                 | 267.63   | -15.9%                 | +5.1%              | +307.1%               | -7.3% |
| Clearwater     | 41.1%                  | 24.0%              | 0.0%                  | 65.2% | 114.87                      | 67.19              | 00.00                 | 182.06   | -15.5%                 | +2.0%              | 0.0%                  | -9.7% |
| St. Petersburg | 43.1%                  | 18.9%              | 0.7%                  | 62.7% | 152.39                      | 66.90              | 02.34                 | 221.62   | -8.5%                  | -9.0%              | -18.1%                | -8.8% |
| Palm Beach     | 53.7%                  | 14.9%              | 1.9%                  | 70.5% | 319.55                      | 88.80              | 11.06                 | 419.41   | +0.5%                  | -20.7%             | +17.9%                | -4.6% |
| Ft. Lauderdale | 56.6%                  | 16.4%              | 2.8%                  | 75.8% | 679.45                      | 197.07             | 33.25                 | 909.76   | 0.0%                   | +2.7%              | -13.1%                | +0.1% |

<sup>1</sup> Metrics provided by STR.

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

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

<sup>4</sup> 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.

# ROOM RATE COMPARISONS<sup>1</sup>

|                | Average Daily Rate (\$) |                    |                       |          | Δ% from Jan 2023       |                    |                       |        |
|----------------|-------------------------|--------------------|-----------------------|----------|------------------------|--------------------|-----------------------|--------|
|                | Transient <sup>2</sup>  | Group <sup>3</sup> | Contract <sup>4</sup> | Total    | Transient <sup>2</sup> | Group <sup>3</sup> | Contract <sup>4</sup> | Total  |
| Naples         | \$393.87                | \$337.19           | \$338.89              | \$371.69 | +25.9%                 | +14.5%             | +79.1%                | +21.2% |
| Miami          | \$252.94                | \$279.87           | \$132.12              | \$251.27 | -2.1%                  | +5.1%              | +17.0%                | 0.0%   |
| Florida Keys   | \$393.95                | \$373.62           | \$402.57              | \$390.37 | +4.6%                  | +0.3%              | +16.0%                | +3.9%  |
| Fort Myers     | \$186.56                | \$212.31           | \$179.31              | \$191.78 | -12.2%                 | -0.7%              | +35.4%                | -7.9%  |
| Sarasota       | \$206.26                | \$189.66           | \$141.00              | \$198.54 | -2.1%                  | +1.7%              | +5.7%                 | -2.8%  |
| Clearwater     | \$173.09                | \$192.33           | \$0.00                | \$180.19 | -0.5%                  | +10.9%             | 0.0%                  | +3.7%  |
| St. Petersburg | \$176.25                | \$178.56           | \$85.13               | \$175.98 | -2.5%                  | +12.7%             | +11.2%                | +1.8%  |
| Palm Beach     | \$294.74                | \$321.16           | \$156.64              | \$296.69 | -5.9%                  | +11.5%             | +36.0%                | -2.0%  |
| Ft. Lauderdale | \$201.03                | \$252.78           | \$167.77              | \$211.02 | -4.0%                  | +4.7%              | +14.6%                | -1.2%  |

<sup>1</sup> Metrics provided by STR.

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

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

<sup>4</sup> 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.

# ROOM REVENUE COMPARISONS<sup>1</sup>

|                | Revenue per Available Room (\$) |                    |                       |          | Revenue (Millions of Dollars) |                    |                       |          | Δ% from Jan 2023       |                    |                       |        |
|----------------|---------------------------------|--------------------|-----------------------|----------|-------------------------------|--------------------|-----------------------|----------|------------------------|--------------------|-----------------------|--------|
|                | Transient <sup>2</sup>          | Group <sup>3</sup> | Contract <sup>4</sup> | Total    | Transient <sup>2</sup>        | Group <sup>3</sup> | Contract <sup>4</sup> | Total    | Transient <sup>2</sup> | Group <sup>3</sup> | Contract <sup>4</sup> | Total  |
| Naples         | \$167.85                        | \$92.18            | \$0.25                | \$260.28 | \$38.33                       | \$21.05            | \$0.06                | \$59.44  | +5.6%                  | +33.0%             | -52.2%                | +13.8% |
| Miami          | \$149.33                        | \$42.03            | \$5.86                | \$197.22 | \$303.70                      | \$85.49            | \$11.91               | \$401.10 | +2.8%                  | +6.4%              | +15.6%                | +3.9%  |
| Florida Keys   | \$254.23                        | \$52.02            | \$0.84                | \$307.09 | \$83.40                       | \$17.07            | \$0.28                | \$100.74 | +0.9%                  | +1.2%              | +2.7%                 | +1.0%  |
| Fort Myers     | \$93.62                         | \$34.89            | \$10.86               | \$139.36 | \$33.22                       | \$12.38            | \$3.85                | \$49.46  | -18.6%                 | -19.1%             | +86.8%                | -15.0% |
| Sarasota       | \$98.94                         | \$33.50            | \$5.23                | \$137.67 | \$38.19                       | \$12.93            | \$2.02                | \$53.14  | -17.7%                 | +6.9%              | +330.2%               | -9.9%  |
| Clearwater     | \$71.16                         | \$46.25            | \$0.00                | \$117.41 | \$19.88                       | \$12.92            | \$0.00                | \$32.81  | -15.9%                 | +13.2%             | 0.0%                  | -6.4%  |
| St. Petersburg | \$75.94                         | \$33.77            | \$0.56                | \$110.27 | \$26.86                       | \$11.95            | \$0.20                | \$39.00  | -10.9%                 | +2.6%              | -8.9%                 | -7.1%  |
| Palm Beach     | \$158.35                        | \$47.95            | \$2.91                | \$209.21 | \$94.19                       | \$28.52            | \$1.73                | \$124.44 | -5.5%                  | -11.6%             | +60.4%                | -6.4%  |
| Ft. Lauderdale | \$113.86                        | \$41.52            | \$4.65                | \$160.03 | \$136.59                      | \$49.82            | \$5.58                | \$191.98 | -4.0%                  | +7.6%              | -0.4%                 | -1.1%  |

<sup>1</sup> Metrics provided by STR.

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

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

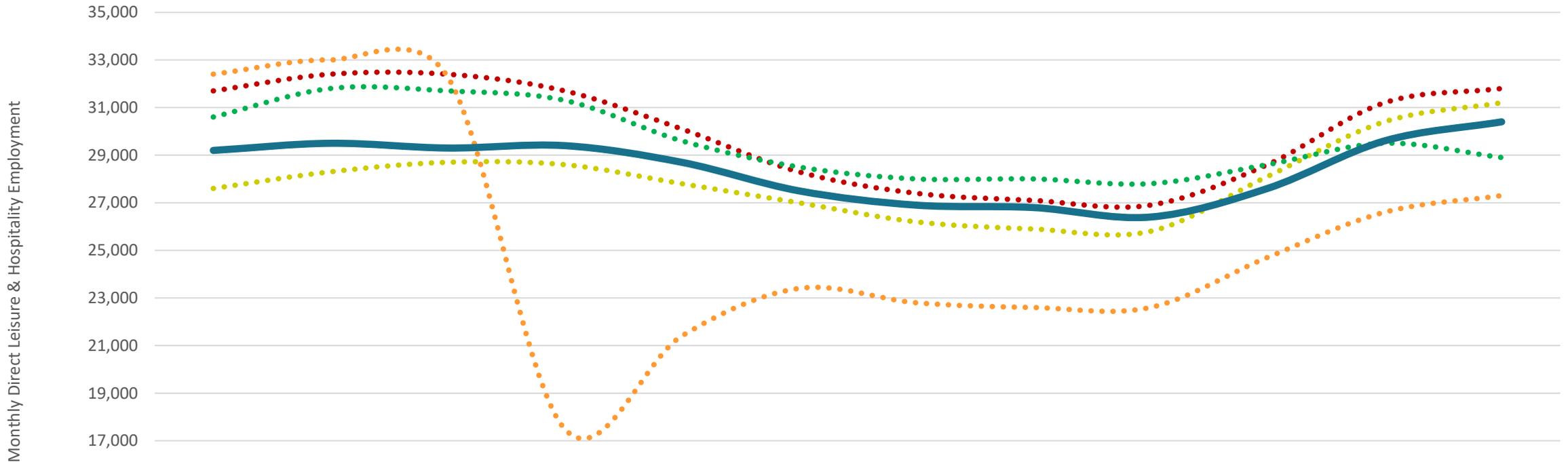
<sup>4</sup> Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.

# INDUSTRY DATA



# LEISURE & HOSPITALTY EMPLOYMENT

Collier County Direct Leisure and Hospitality Employment (Calendar Year)<sup>1</sup>

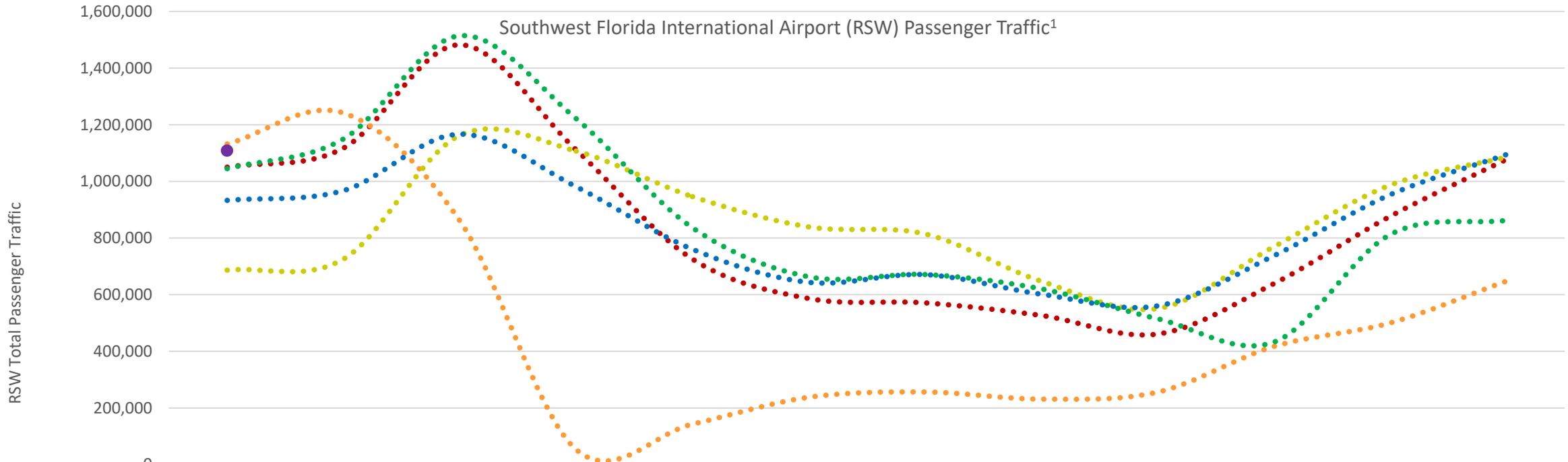


Monthly Direct Leisure & Hospitality Employment

|            | 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  | 29,600   | 30,400 (P) |

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

# RSW PASSENGER TRAFFIC



|            | 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 |           |           |           |         |         |         |         |           |         |          |           |

<sup>1</sup>SOURCE: Lee County Port Authority Monthly Statistics.

# LICENSED TRANSIENT RENTAL UNITS

| January 2024 Licensed Transient Rental Units <sup>1</sup> |              |              |                 |                           |
|---|--------------|--------------|-----------------|---------------------------|
|   | 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                         |
| <b>Total</b>  | <b>5,915</b> | <b>1,763</b> | <b>5,245</b>    | <b>12,923<sup>2</sup></b> |

<sup>1</sup>SOURCE: [Florida Department of Business & Professional Regulation](#).

<sup>2</sup>Some number of units may be licensed but still unavailable due to recovery from the impact of Hurricane Ian.

# NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau  
January 2024 Monthly Dashboard

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