



**NAPLES · MARCO ISLAND  
EVERGLADES<sup>SM</sup>**

FLORIDA'S PARADISE COAST

July 2024 Monthly Visitor Dashboard

# TABLE OF CONTENTS

---

- 1) **Monthly Snapshot:** pg. 3-4
  
- 2) **Executive Summary:** pgs. 5-19
  - a) Monthly Summary: pgs. 5-12
  - b) Fiscal Year-to-Date (FYTD) Summary: pgs. 13-19
  
- 3) **Detailed Findings:** pgs. 20-40
  - a) Pre-Visit: pgs. 20-26
  - b) Travel Party Profile: pgs. 27-32
  - c) Trip Experience: pgs. 33-38
  - d) Post-Trip Evaluation: pgs. 39-40
  
- 4) **Destination Comparisons:** pgs. 41-52
  - a) Monthly Comparisons: pgs. 41-44
  - b) Calendar Year-to-Date (CYTD) Comparisons: pgs. 45-48
  - c) Fiscal Year-to-Date (FYTD) Comparisons: pgs. 49-52
  
- 5) **Occupancy Barometer:** pgs. 53-54
  
- 6) **Industry Data:** pgs. 55-58



1

MONTHLY  
SNAPSHOT

- In July 2024, overall occupancy rate decreased 3.2% compared to July 2023, largely due to the increase in the number of room nights available being larger than the increase in room night demand.
- Average Daily Rate (ADR) increased 3.6% year-over-year, which resulted in a revenue per available room (RevPAR) of \$138.52, up only very slightly from \$138.16 last year.
- Direct spending by visitors and total economic impact of tourism in July increased by 4.7% and 4.6%, respectively. The total economic impact of tourism is currently up 11.5% so far fiscal-year-to-date, with two months remaining in the 2024 fiscal year.
- In terms of visitor attributes, July 2024 saw year-over-year increases in the number of visitors who came for special occasions (weddings, reunions, etc.), visitors who dined out during their visits, visitors travelling as a couple, and in the median household income of visitors.
- In July 2024, compared to July 2023, there were fewer travelers who traveled as a family, fewer first-time visitors, and fewer visitors whose main reason for visiting the area was for a vacation or getaway.



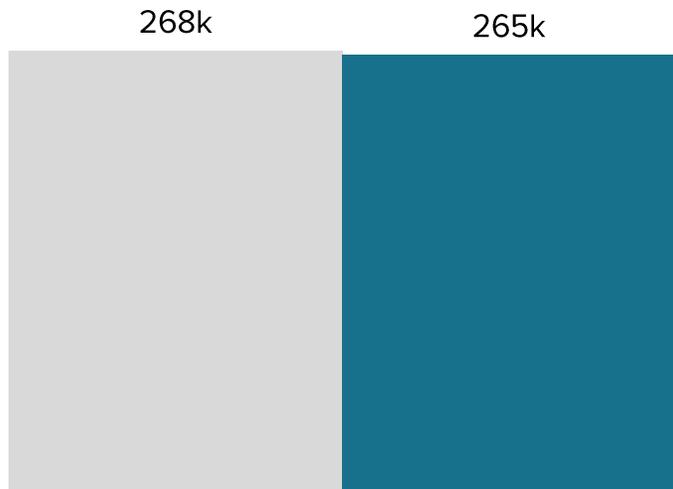
# 2a

EXECUTIVE  
MONTHLY  
SUMMARY

# JULY 2024 | VISITATION & ROOM NIGHTS

VISITORS

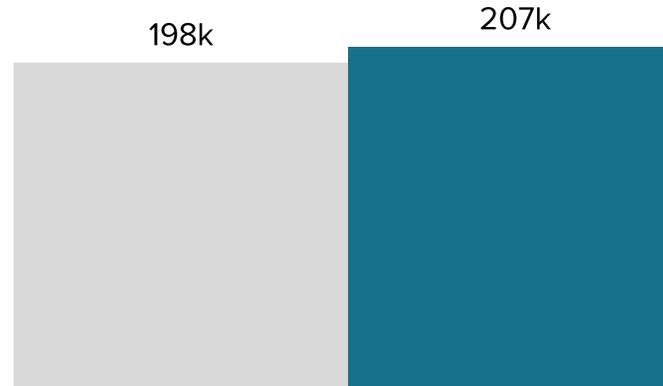
265,300



- 0.9% from 2023

ROOM NIGHTS

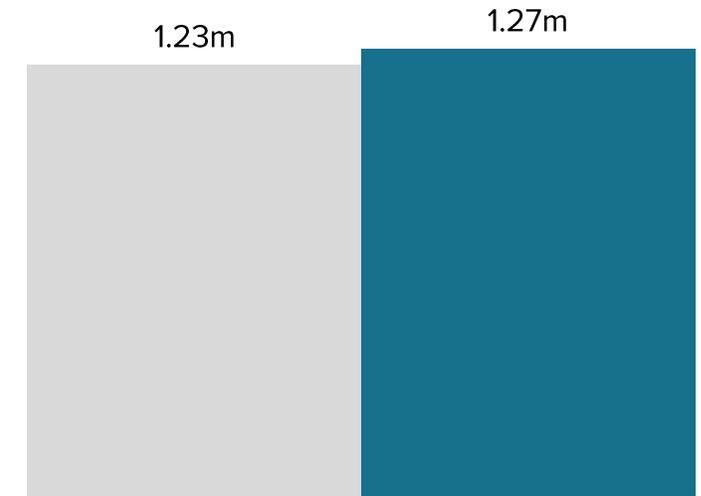
207,000



+ 4.8% from 2023

VISITOR DAYS

1,273,400



+ 3.6% from 2023

■ July-23 ■ July-24

## DIRECT SPENDING

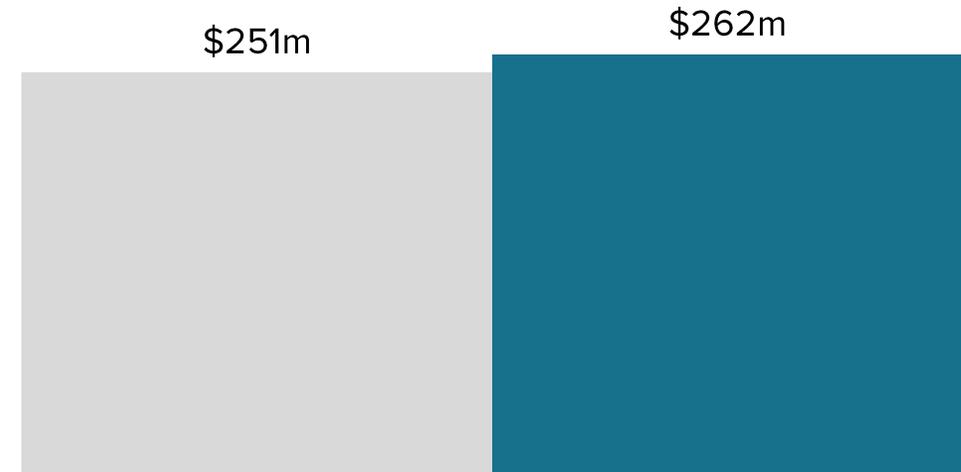
# \$189,193,000



+ 4.7% from 2023

## ECONOMIC IMPACT

# \$262,221,500



+ 4.6% from 2023

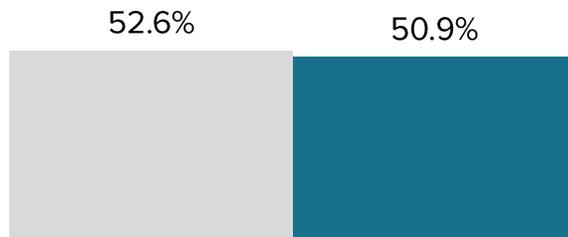
■ July-23   ■ July-24

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

# JULY 2024 | OVERALL LODGING METRICS<sup>1,2</sup>

## OCCUPANCY RATE

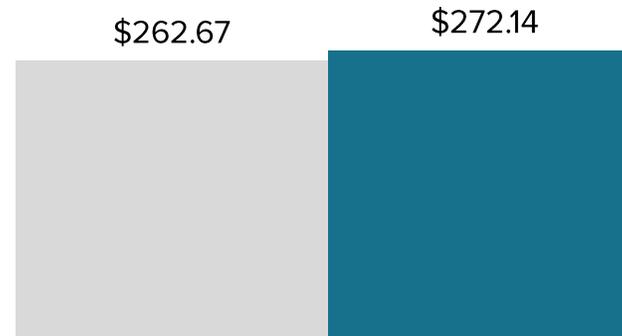
50.9%



- 3.2% from 2023

## AVERAGE DAILY RATE

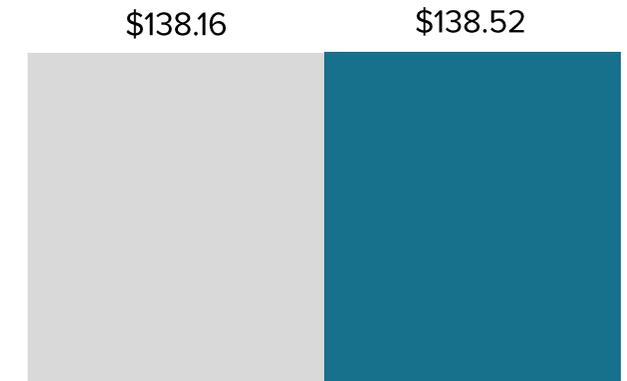
\$272.14



+ 3.6% from 2023

## REVENUE PER AVAILABLE ROOM

\$138.52



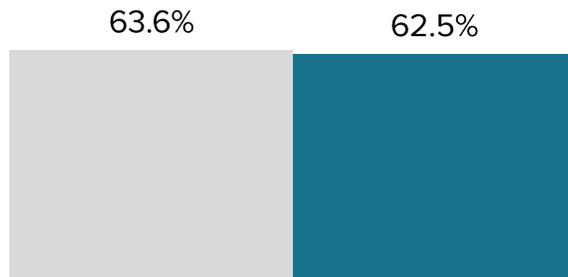
+ 0.3% from 2023

■ July-23    ■ July-24

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

## OCCUPANCY RATE<sup>3</sup>

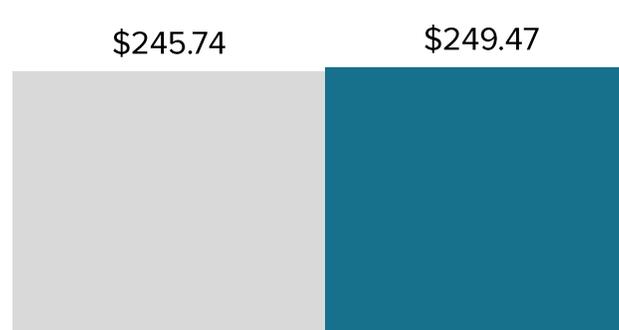
# 62.5%



- 1.7% from 2023

## AVERAGE DAILY RATE

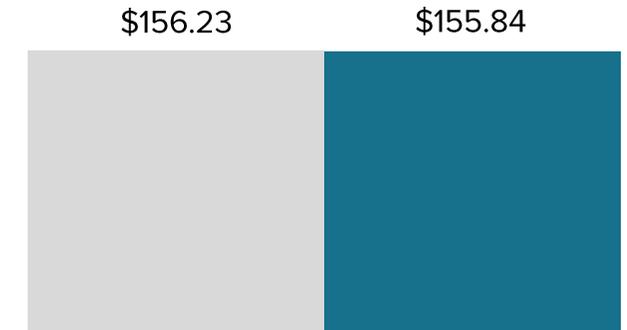
# \$249.47



+ 1.5% from 2023

## REVENUE PER AVAILABLE ROOM

# \$155.84



- 0.3% from 2023

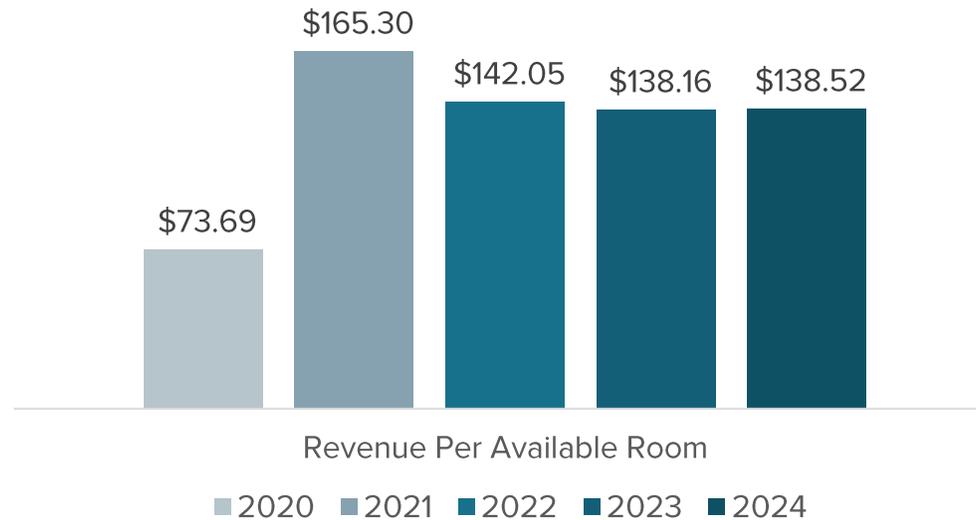
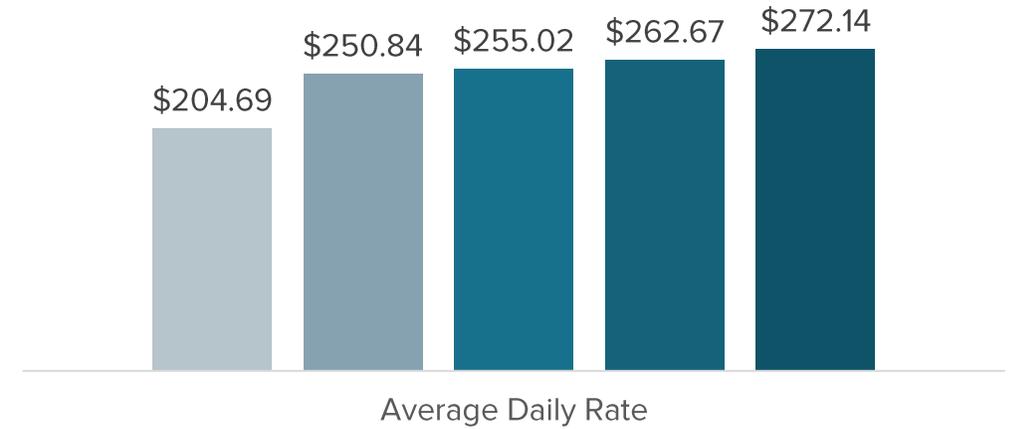
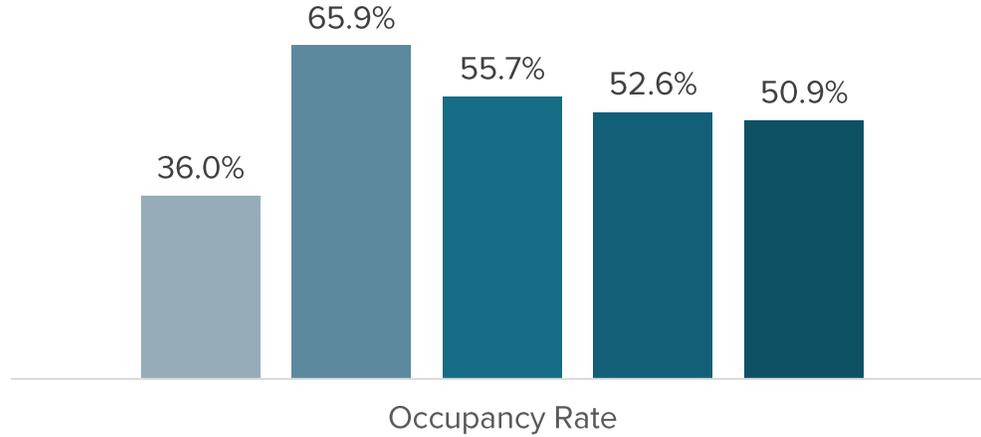
■ July-23   ■ July-24

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

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

<sup>3</sup>Although Occupancy Rate is down year-over-year, this is largely due to the increased number of available units in 2024. Hotel room supply increased 6.6% while demand increased 4.8%, compared to July 2023.

# JULY | OVERALL LODGING METRICS TREND<sup>1</sup>



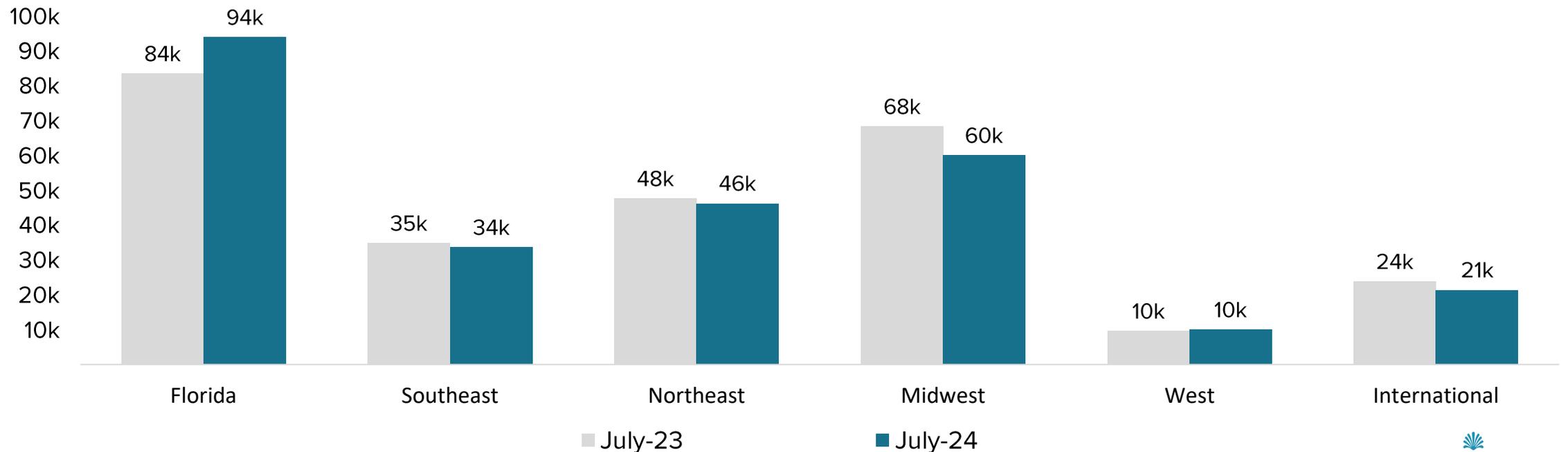
<sup>1</sup>Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

## FLORIDA VISITORS

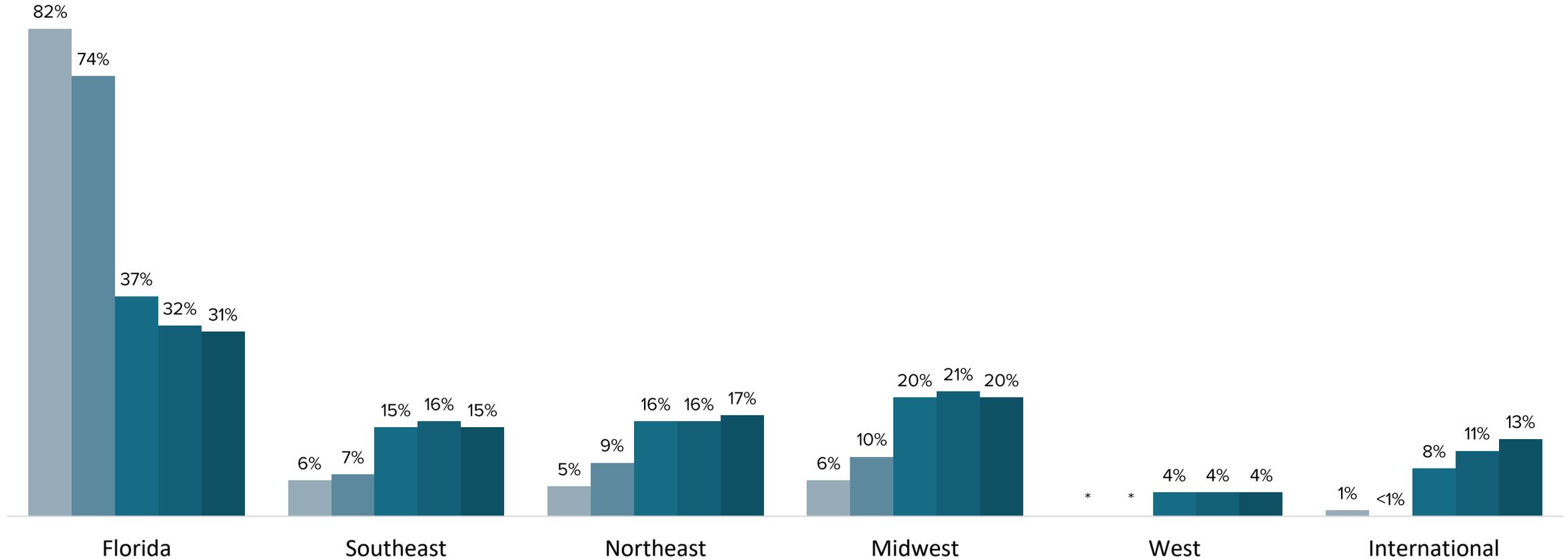
# 93,900

## OUT-OF-STATE VISITORS

# 171,400



# JULY | OVERNIGHT VISITOR ORIGIN TREND



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

■ July-20   ■ July-21   ■ July-22   ■ July-23   ■ July-24



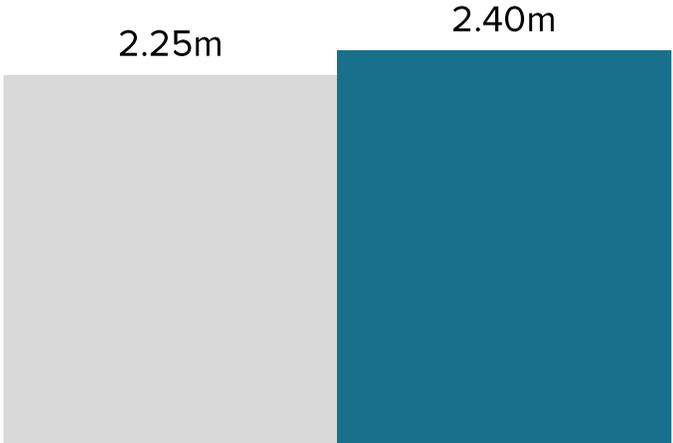
# 2b

EXECUTIVE  
FISCAL  
YEAR-TO-DATE  
(FYTD)  
SUMMARY

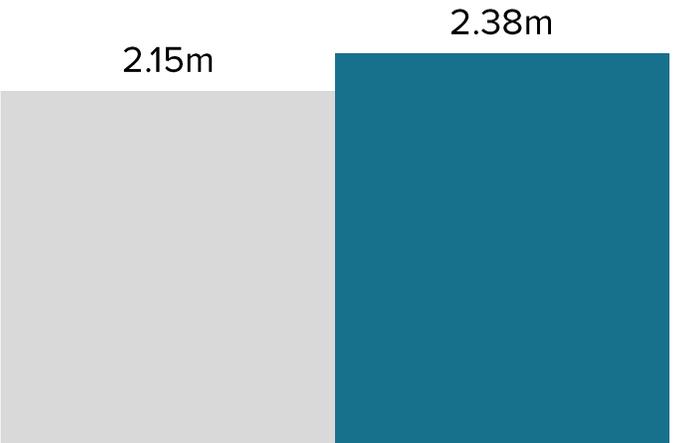
FYTD VISITORS  
**2,397,600**

FYTD ROOM NIGHTS  
**2,379,800**

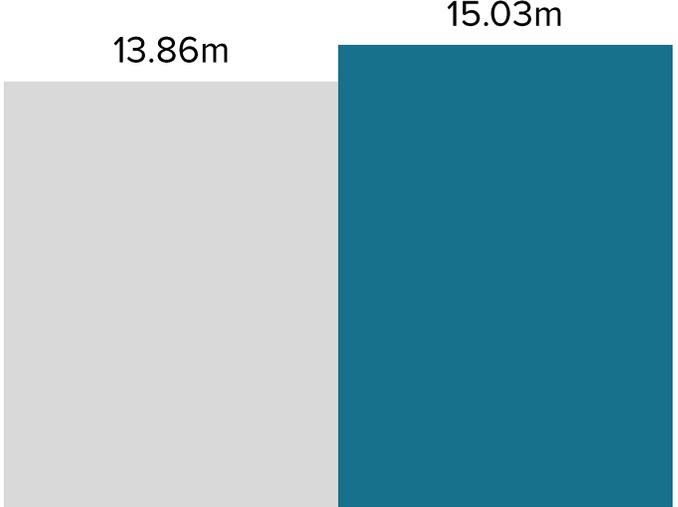
FYTD VISITOR DAYS  
**15,034,100**



+ **6.6%** from FY23



+ **10.7%** from FY23



+ **8.4%** from FY23

■ FY23 ■ FY24

## FYTD DIRECT SPENDING

# \$2,587,081,000

+ 14.3% from FY23

## FYTD ECONOMIC IMPACT

# \$3,586,886,900

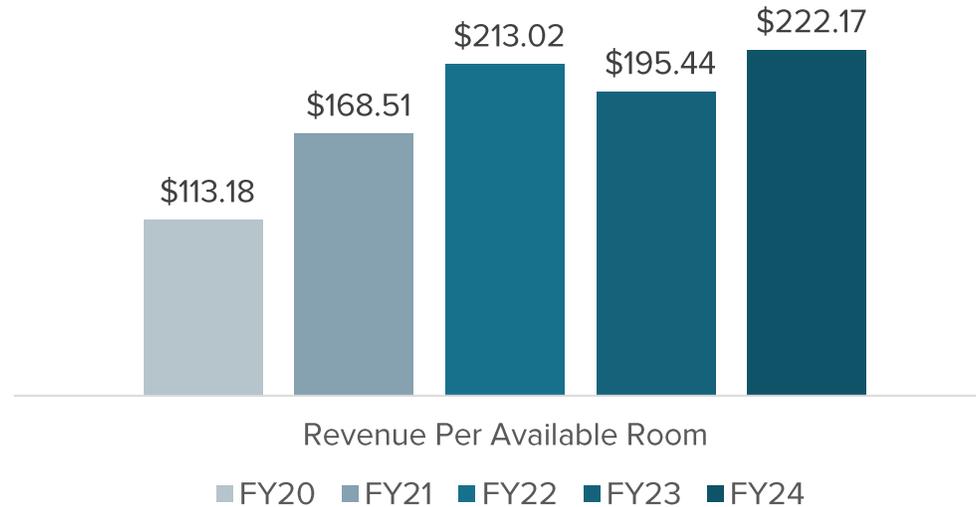
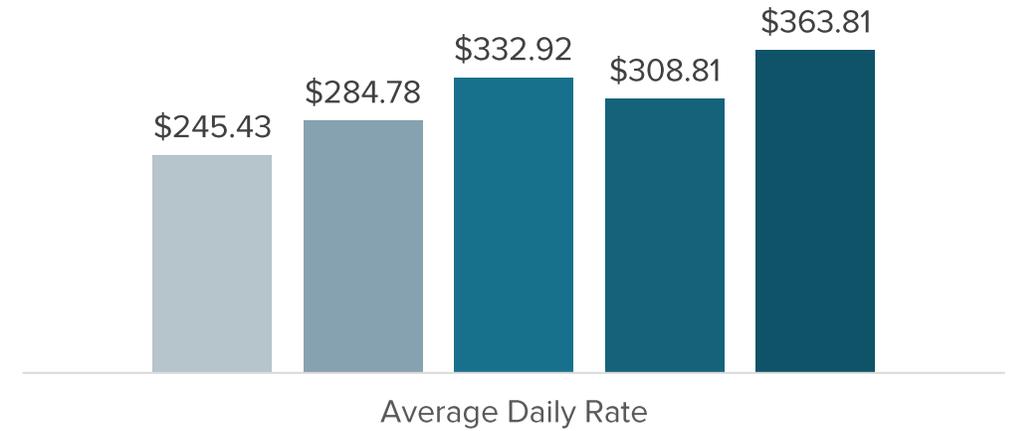
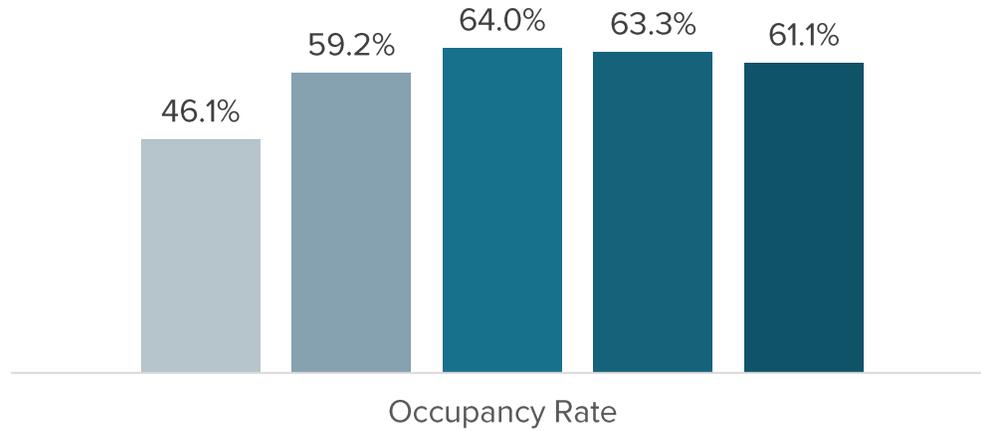
+ 11.5% from FY23<sup>1</sup>



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

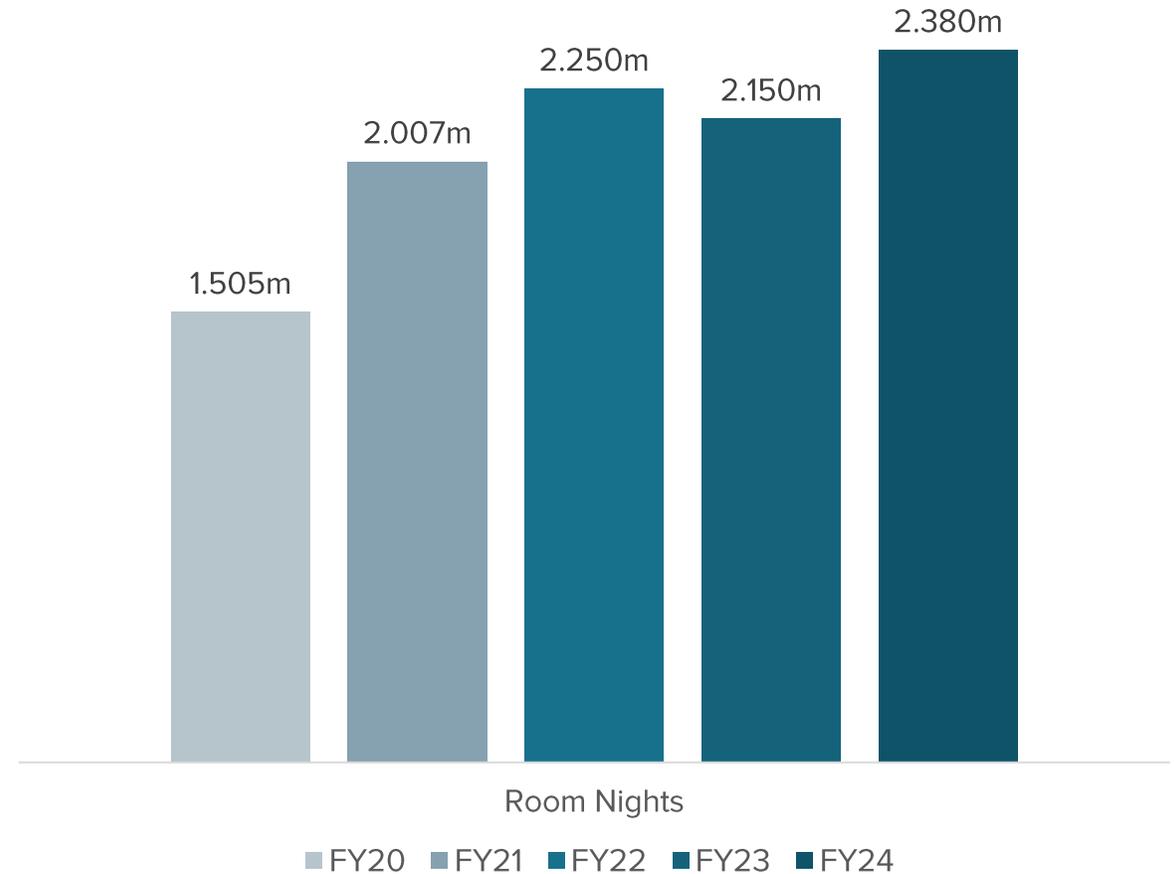
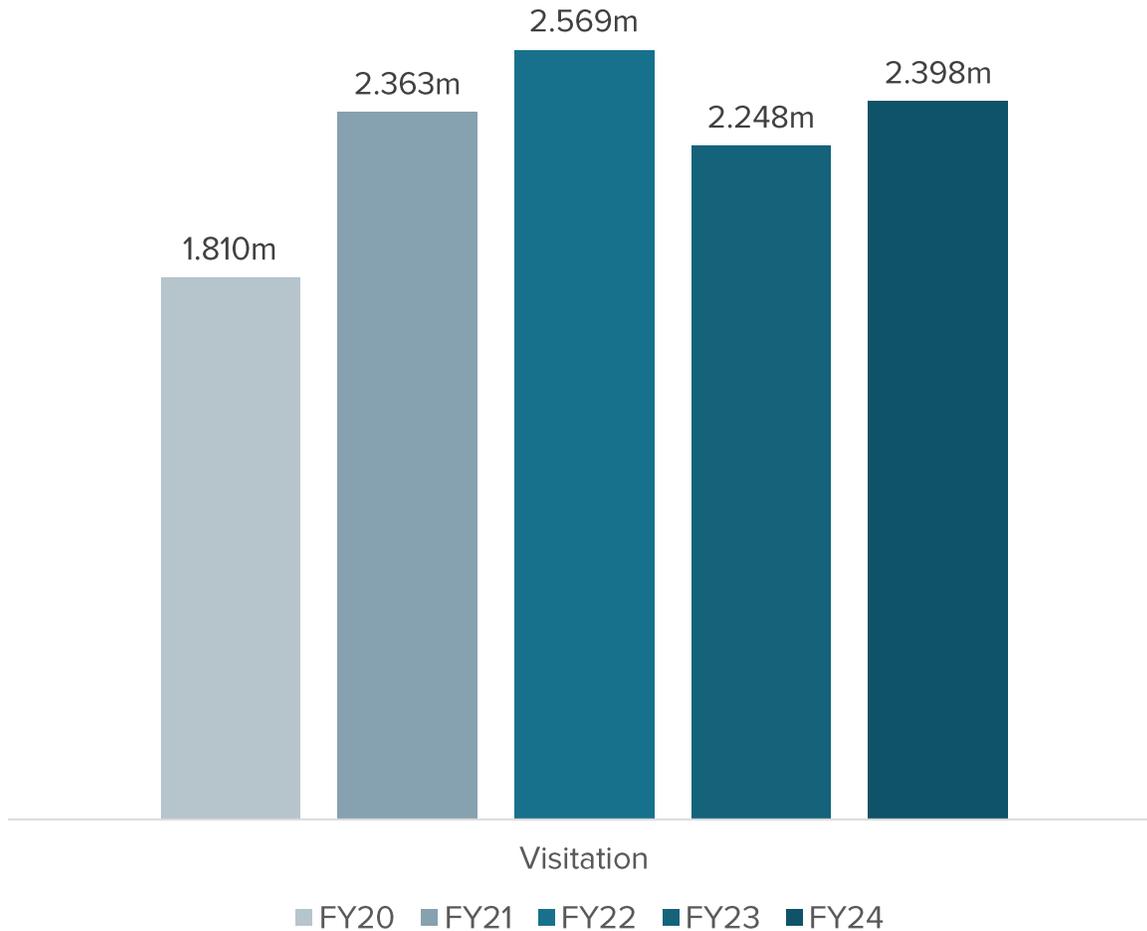
■ FY23 ■ FY24

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



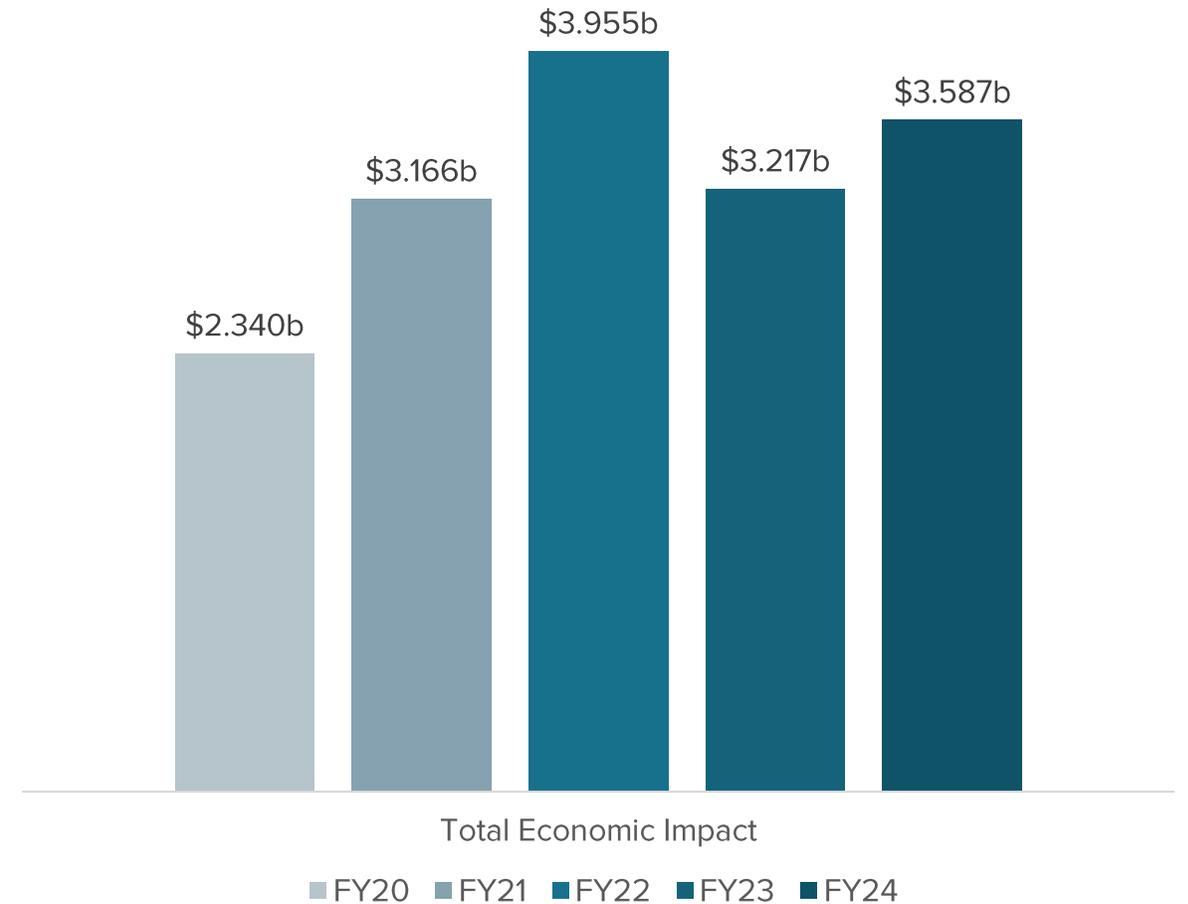
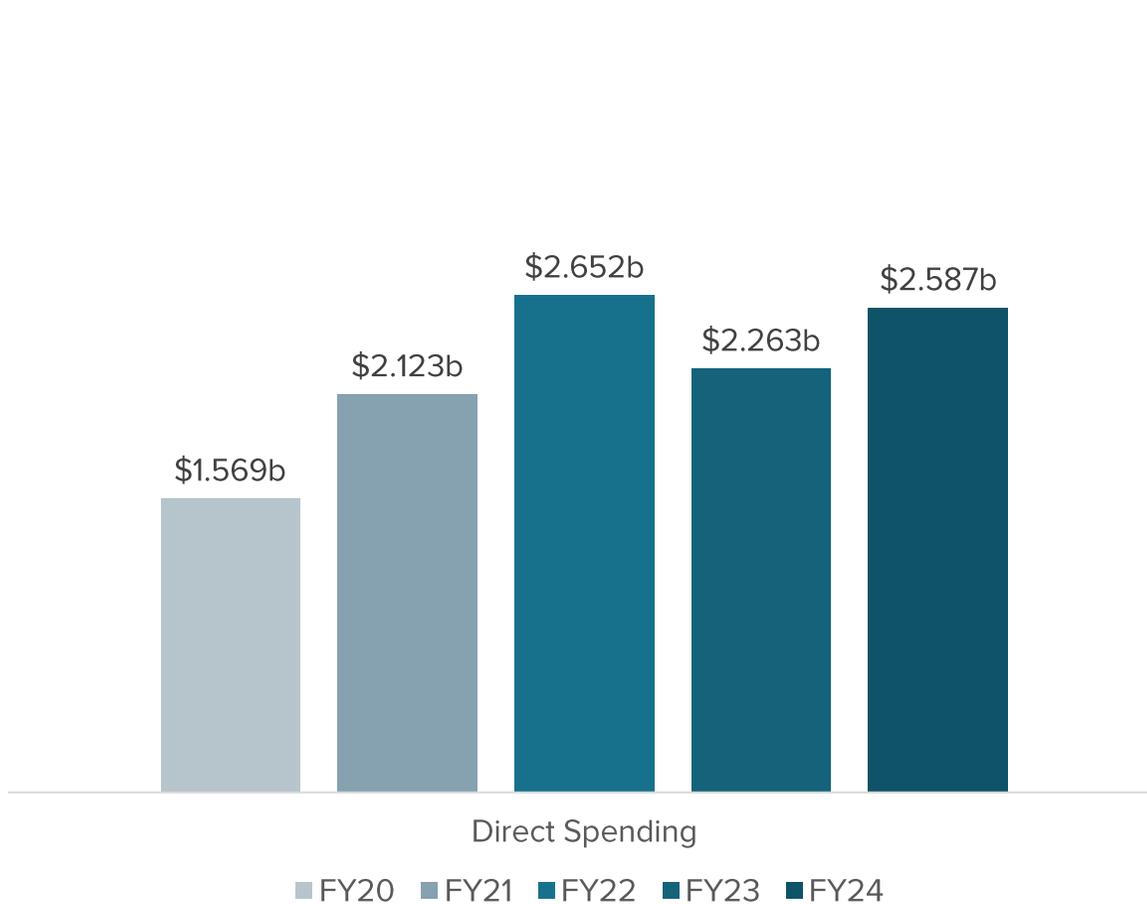
<sup>1</sup>Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

# FYTD | 2020-2024 VISITATION & ROOM NIGHTS<sup>1</sup>



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

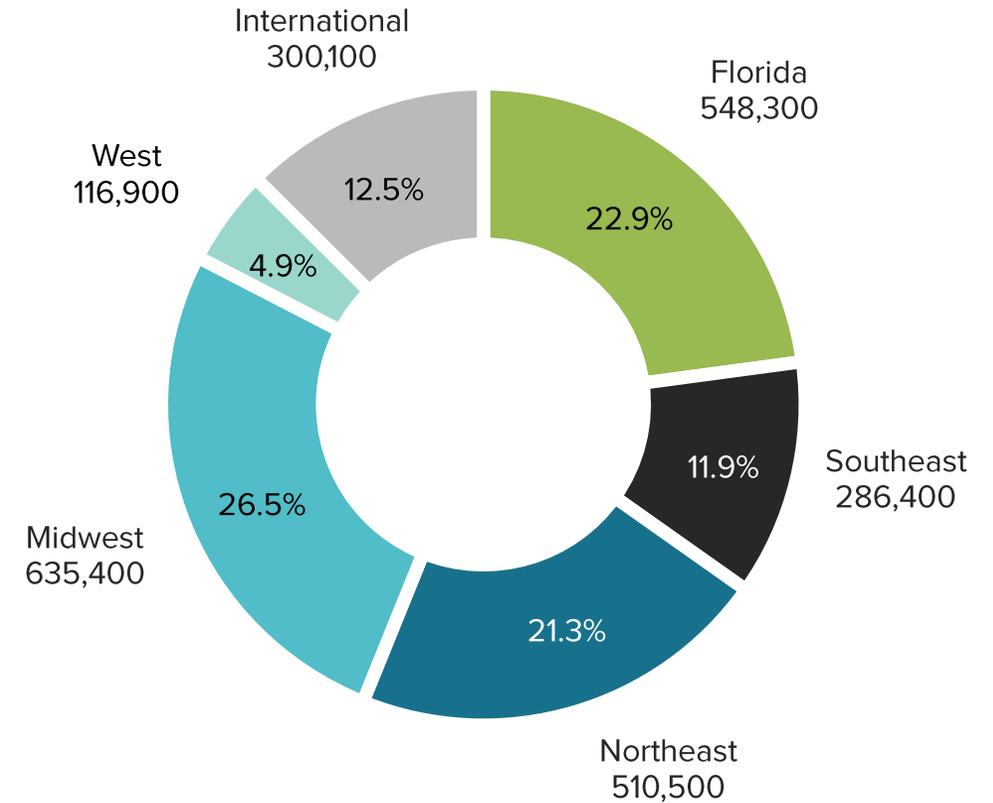
# FYTD | 2020-2024 SPENDING & ECONOMIC IMPACT<sup>1</sup>



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

# FYTD | VISITOR ORIGIN

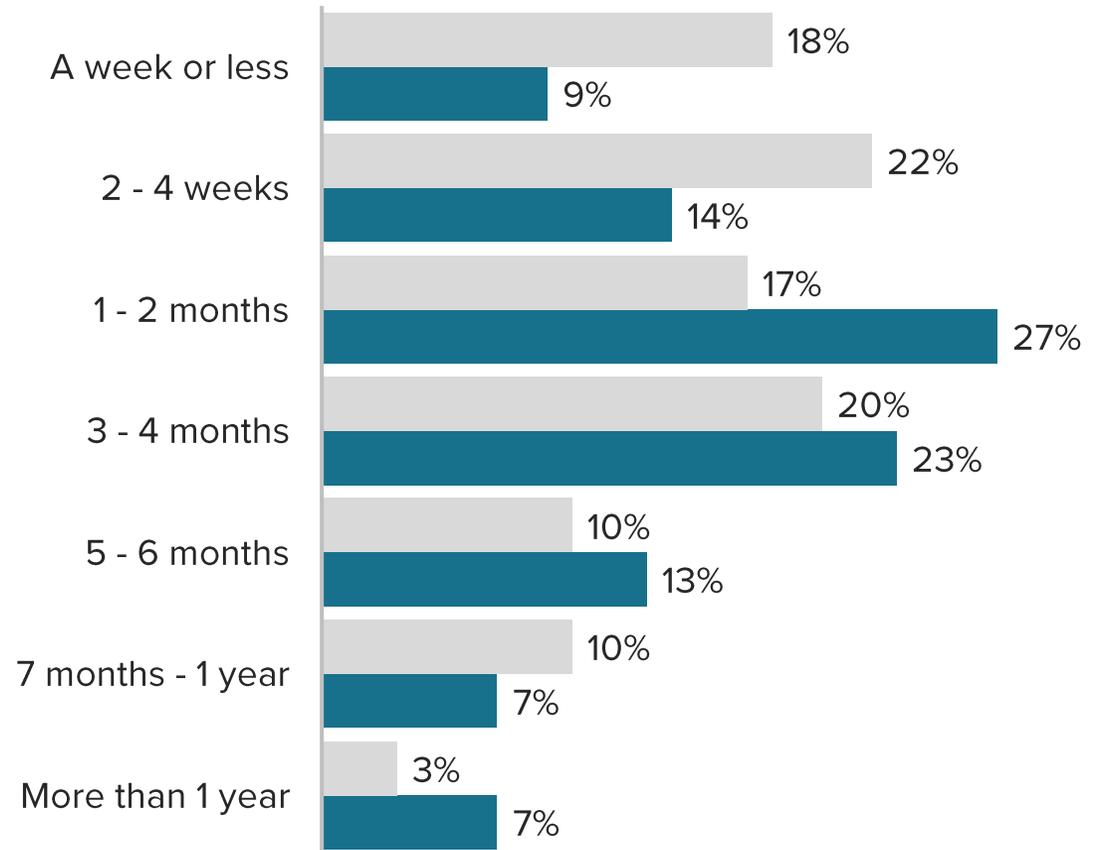
Region	FYTD 2023		FYTD 2024		Percent Change (±Δ%)	
	# Visitors	% Share	# Visitors	% Share	# Visitors	% Share
Florida	607,100	27.0%	548,300	22.9%	-9.7%	-15.3%
Southeast	229,300	10.2%	286,400	11.9%	24.9%	17.1%
Northeast	446,400	19.9%	510,500	21.3%	14.4%	7.2%
Midwest	617,000	27.4%	635,400	26.5%	3.0%	-3.4%
West	112,500	5.0%	116,900	4.9%	3.9%	-2.6%
Canada	98,100	4.4%	109,200	4.5%	11.3%	4.4%
Europe	80,900	3.6%	130,800	5.5%	61.7%	51.6%
C/S America	31,700	1.4%	34,600	1.4%	9.1%	2.4%
Other	25,400	1.1%	25,500	1.1%	0.4%	-5.9%
<b>Total</b>	<b>2,248,400</b>	<b>100.0%</b>	<b>2,397,600</b>	<b>100.0%</b>		





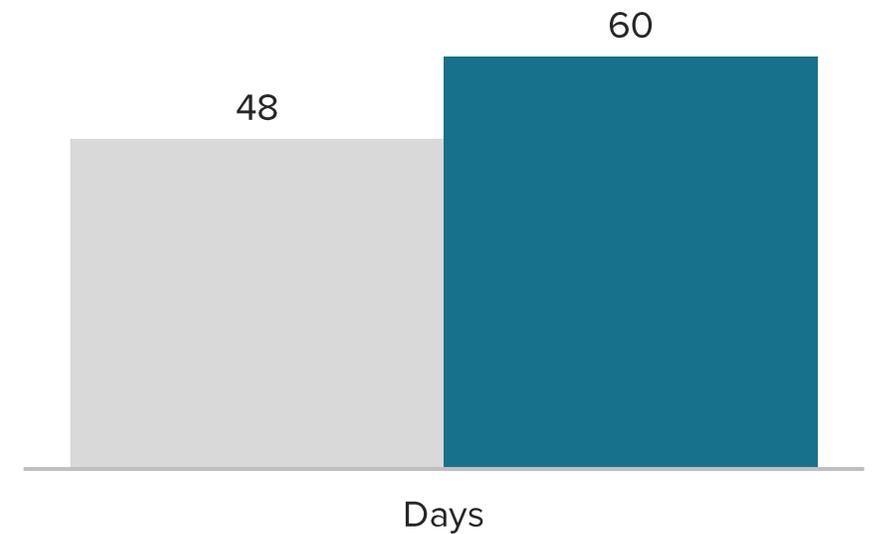
# 3a

DETAILED FINDINGS:  
PRE-VISIT

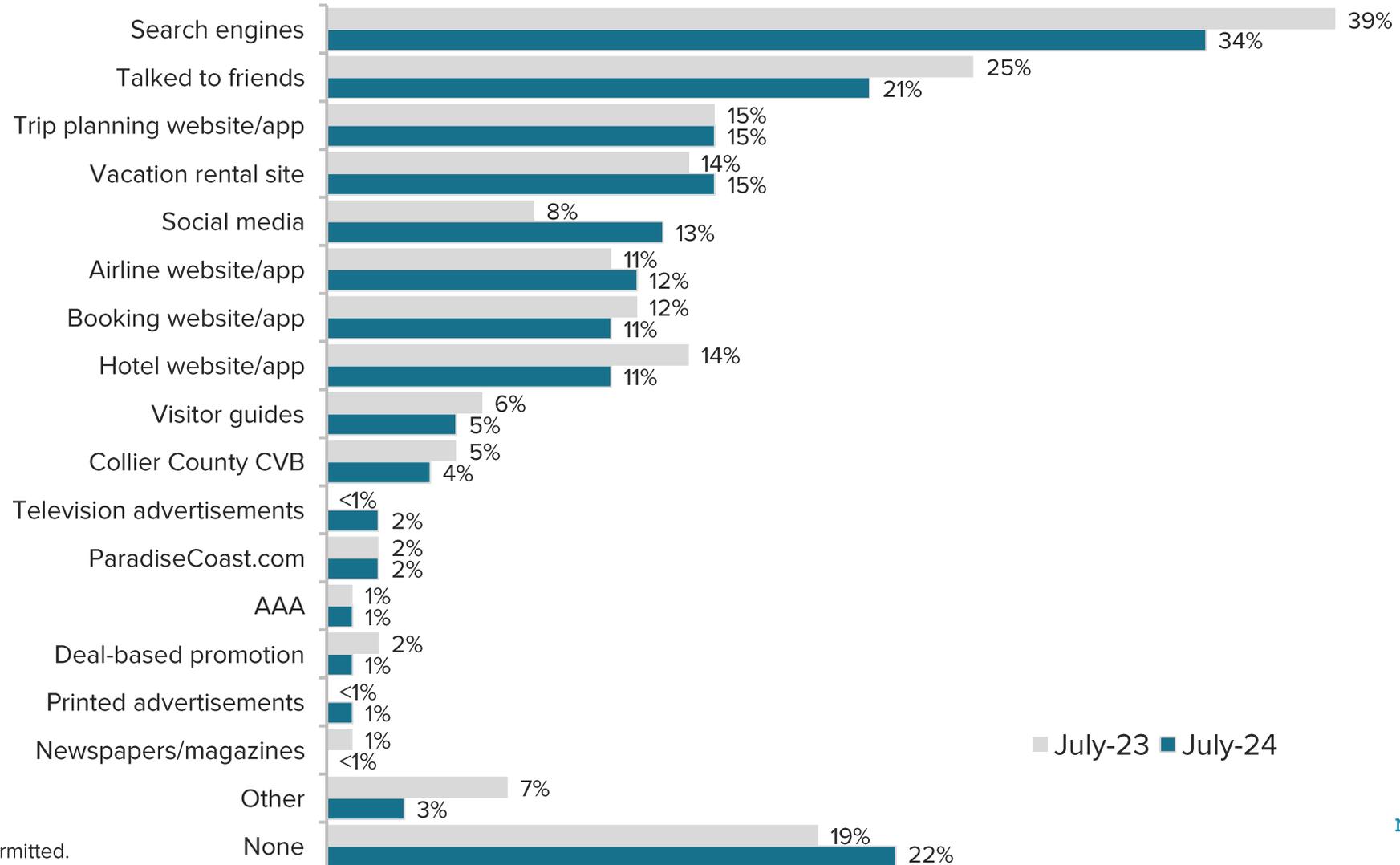


■ July-23 ■ July-24

## Median Trip Planning Time

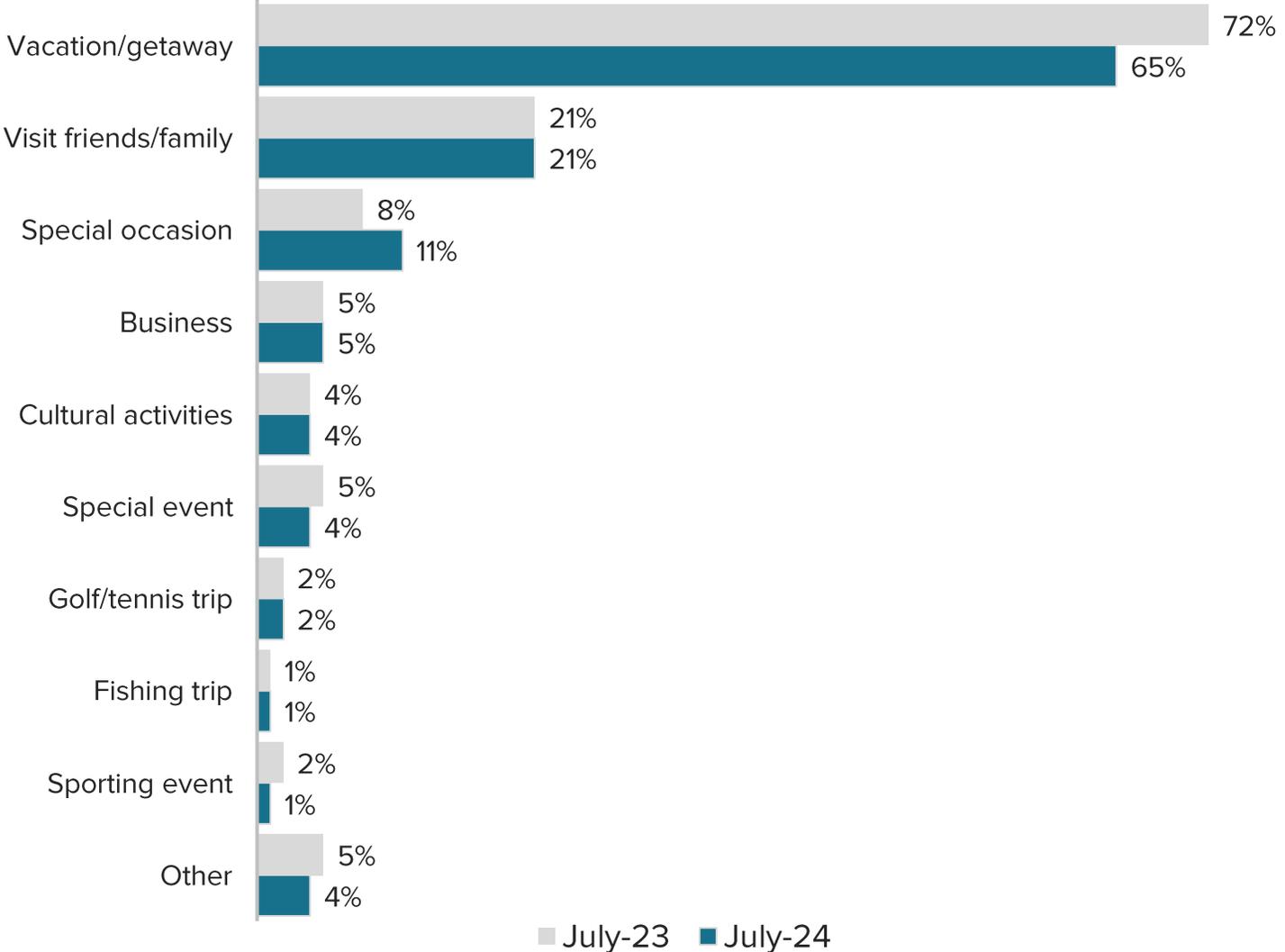


# DETAILED FINDINGS | TRIP PLANNING SOURCES<sup>1</sup>



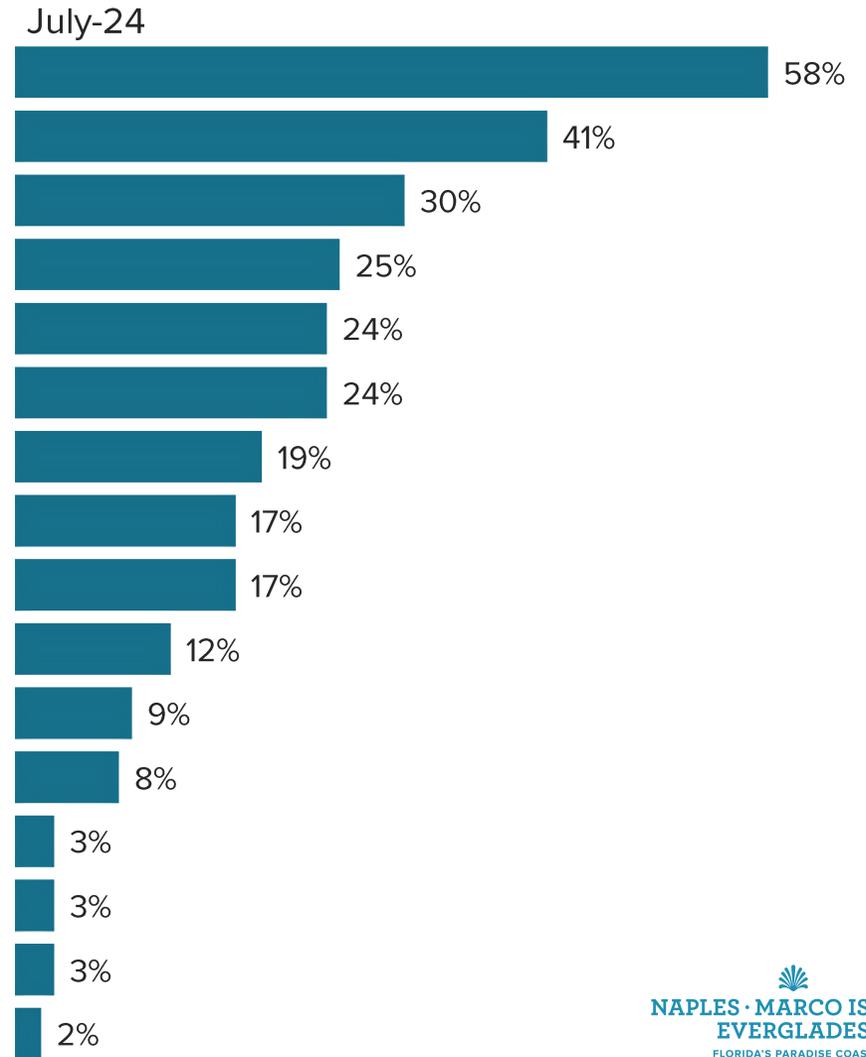
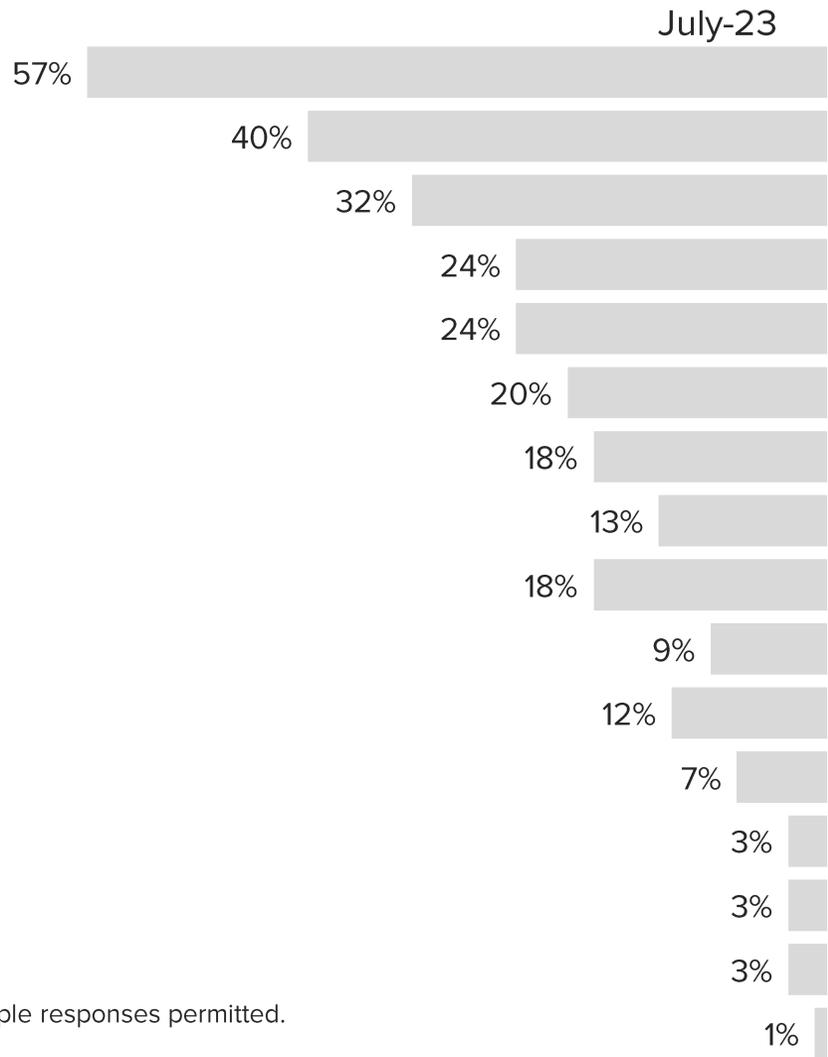
<sup>1</sup>Multiple responses permitted.

# DETAILED FINDINGS | REASONS FOR VISITING<sup>1</sup>



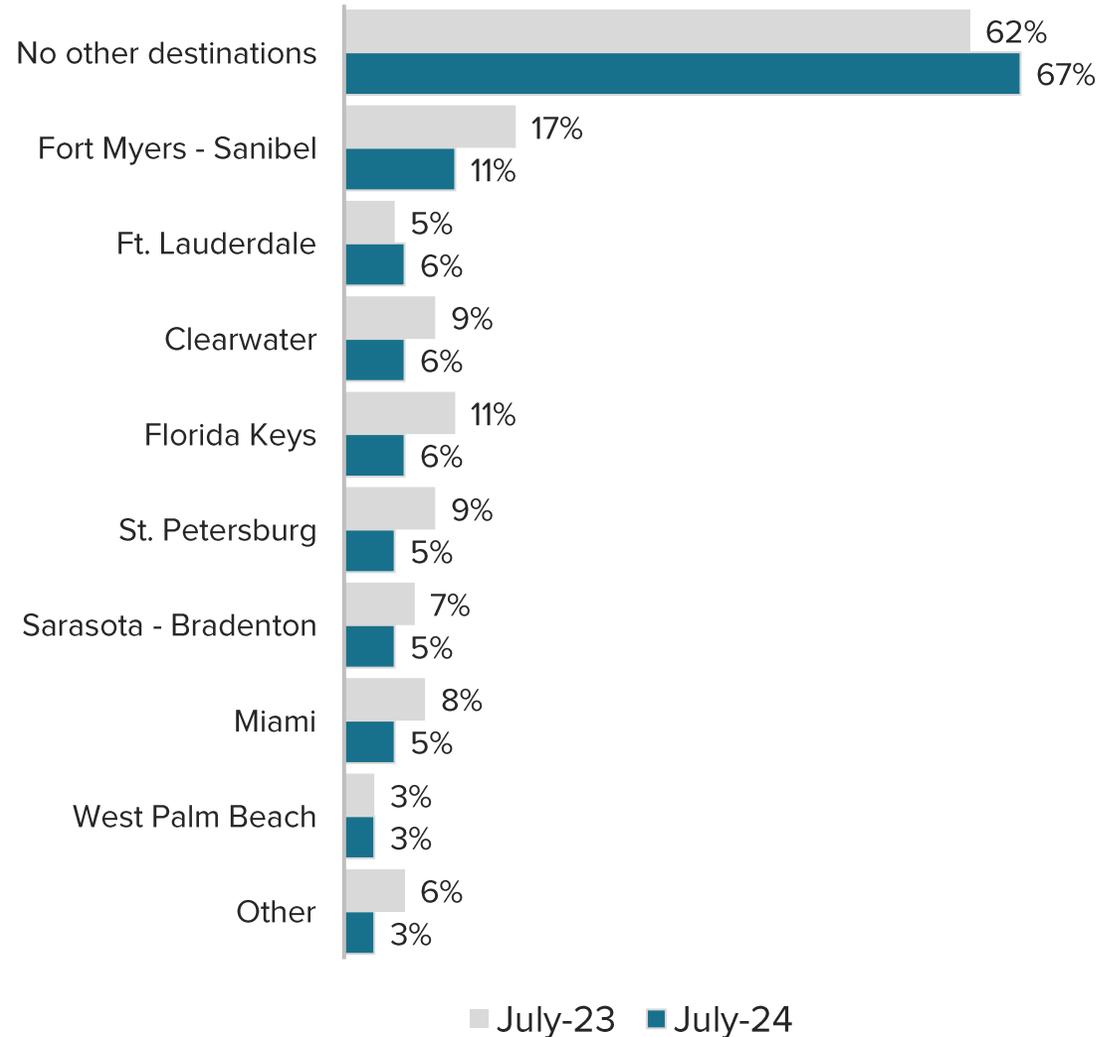
<sup>1</sup>Multiple responses permitted.

# DETAILED FINDINGS | REASONS FOR CHOOSING<sup>1</sup>



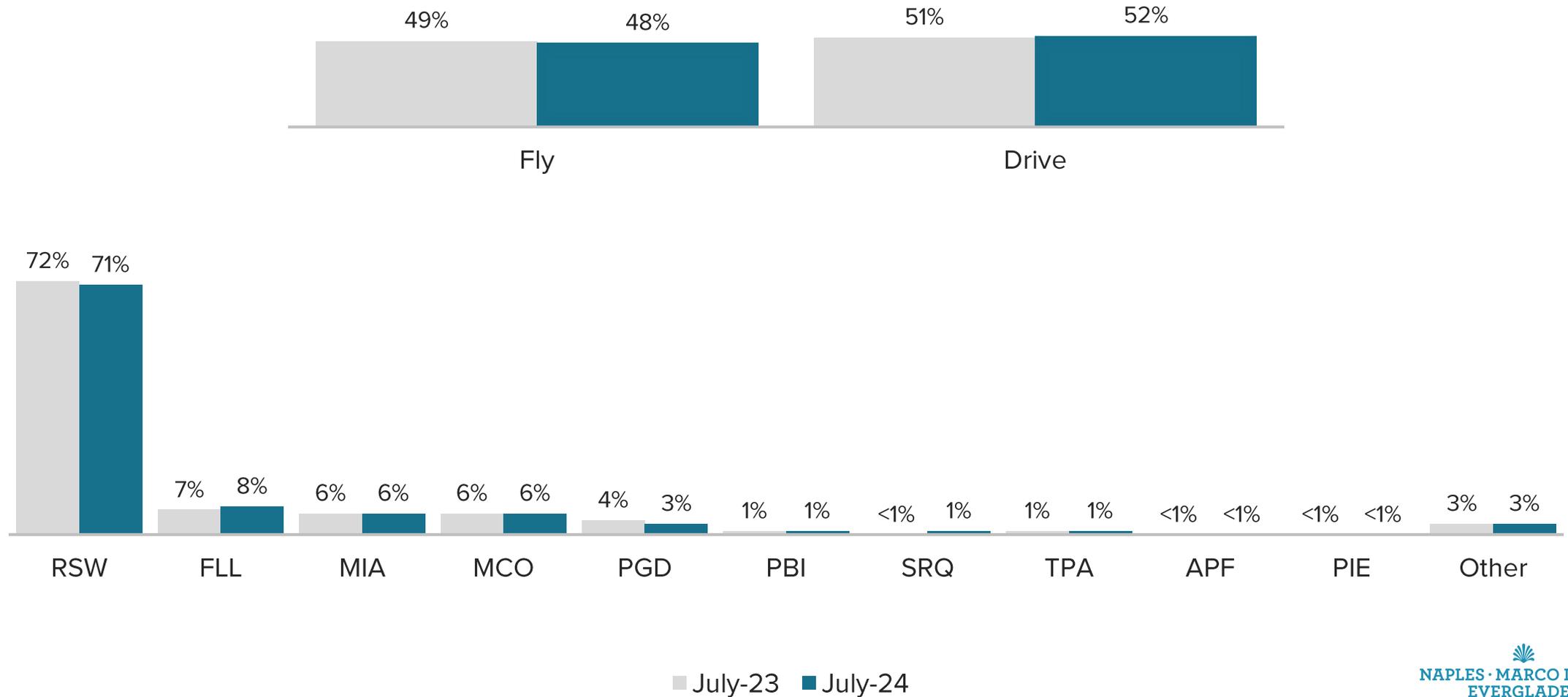
<sup>1</sup>Multiple responses permitted.

# DETAILED FINDINGS | DESTINATIONS CONSIDERED<sup>1</sup>



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

# DETAILED FINDINGS | TRANSPORTATION

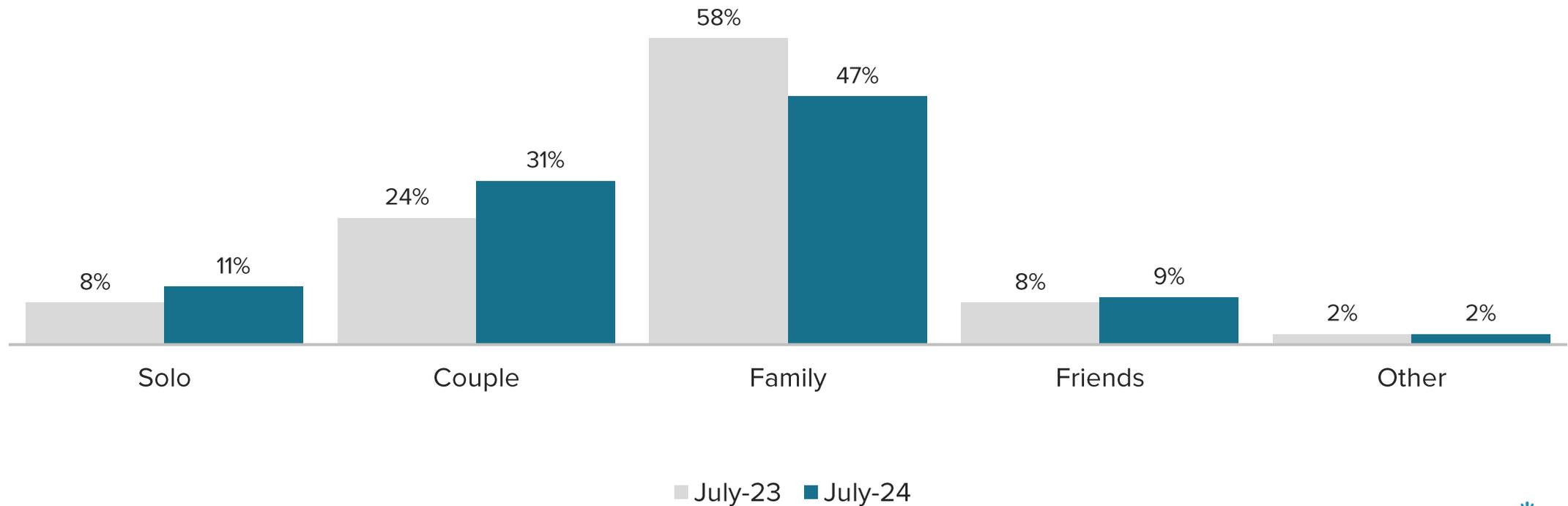




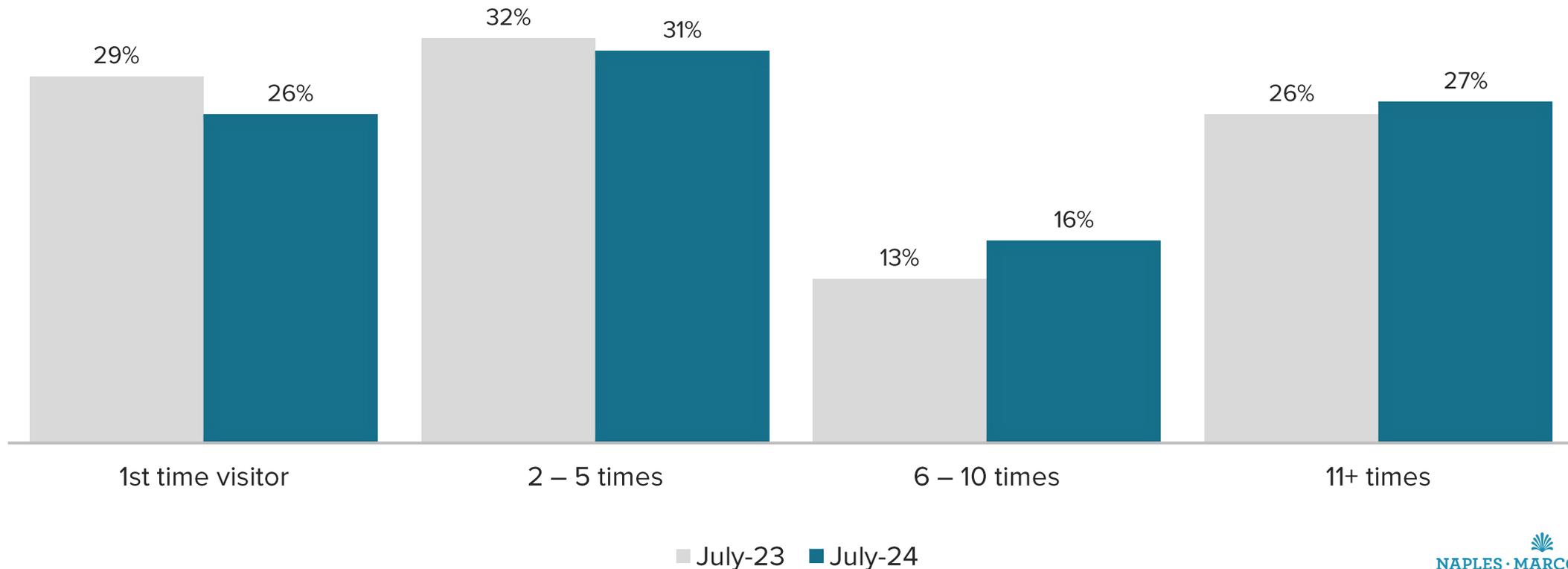
# 3b

DETAILED FINDINGS:  
TRAVEL PARTY  
PROFILE

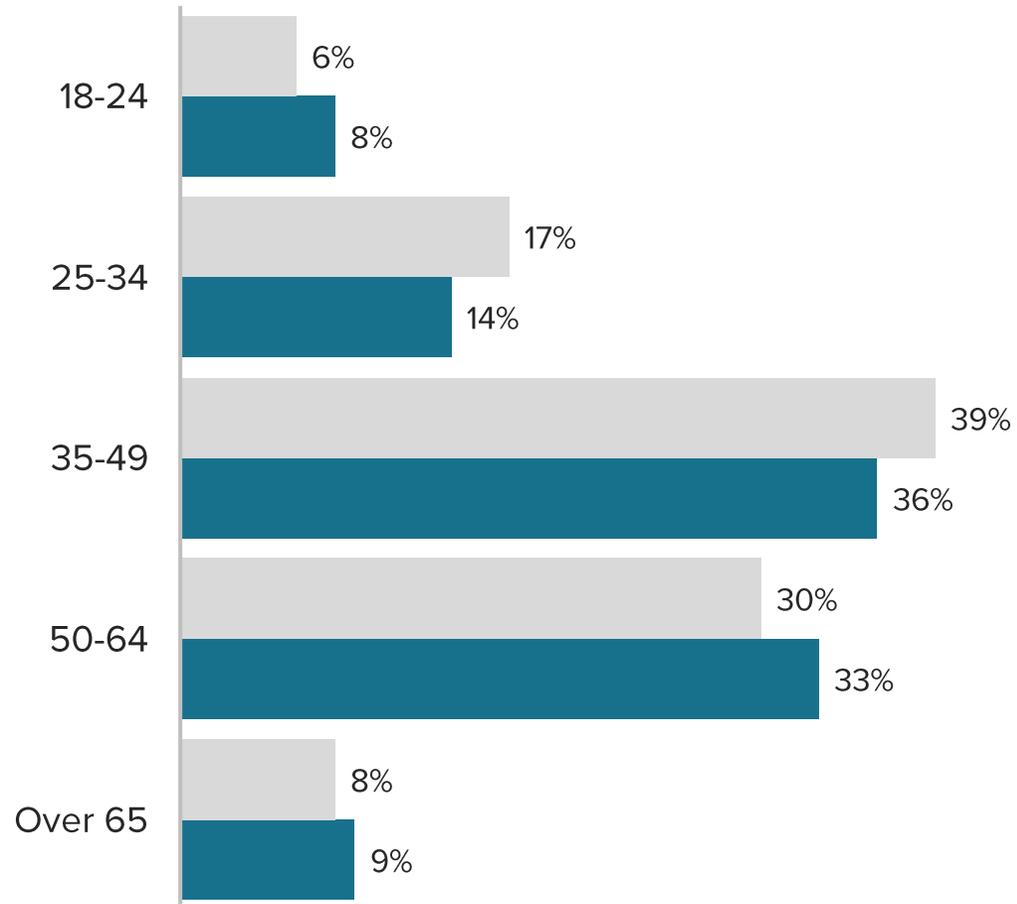
# DETAILED FINDINGS | TRAVEL PARTY TYPE



# DETAILED FINDINGS | PREVIOUS VISITS

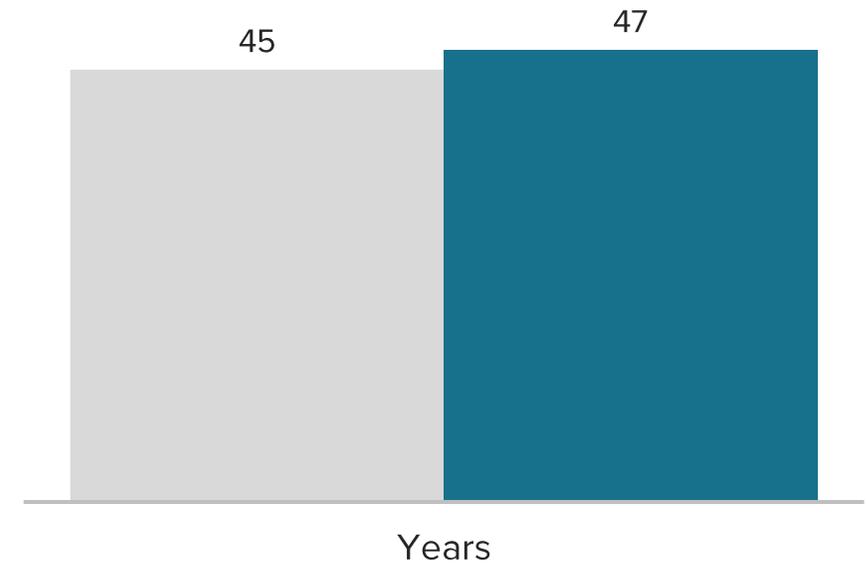


# DETAILED FINDINGS | VISITOR AGES

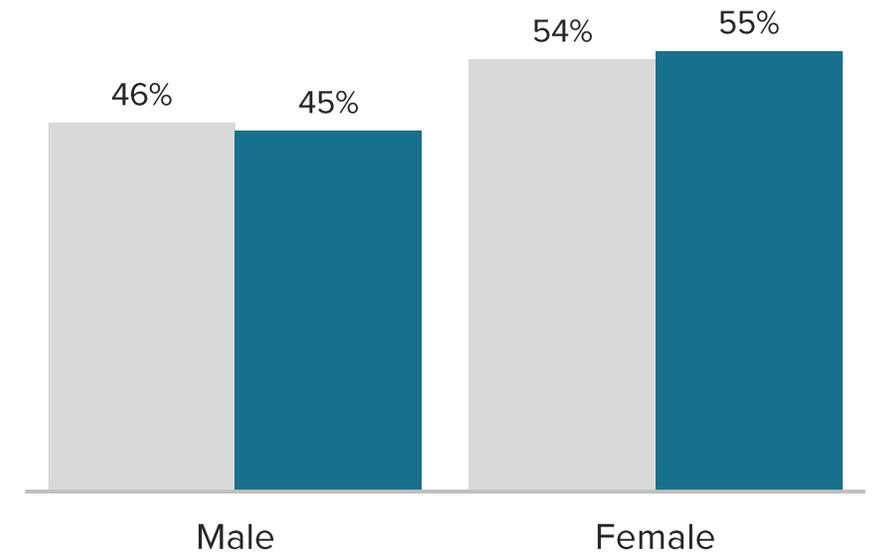
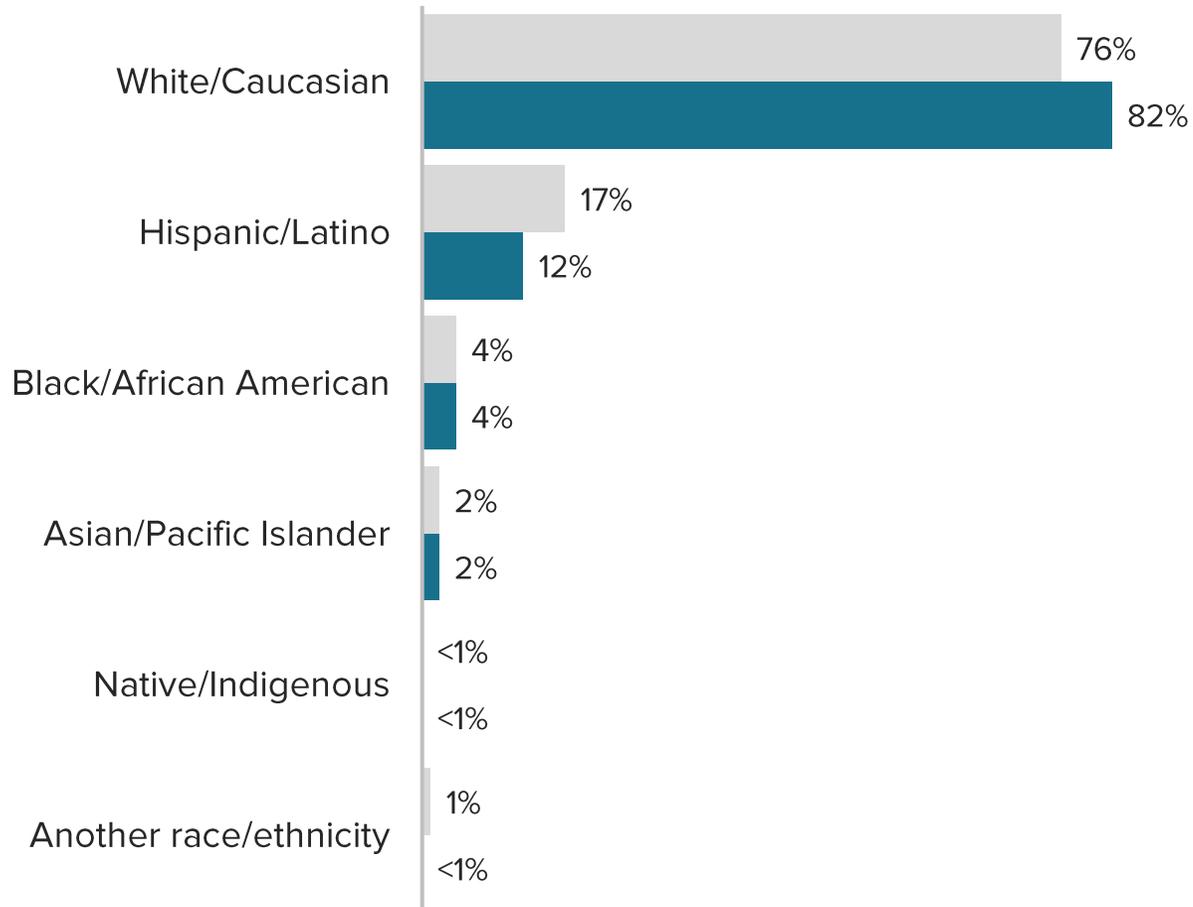


■ July-23 ■ July-24

## Median Age



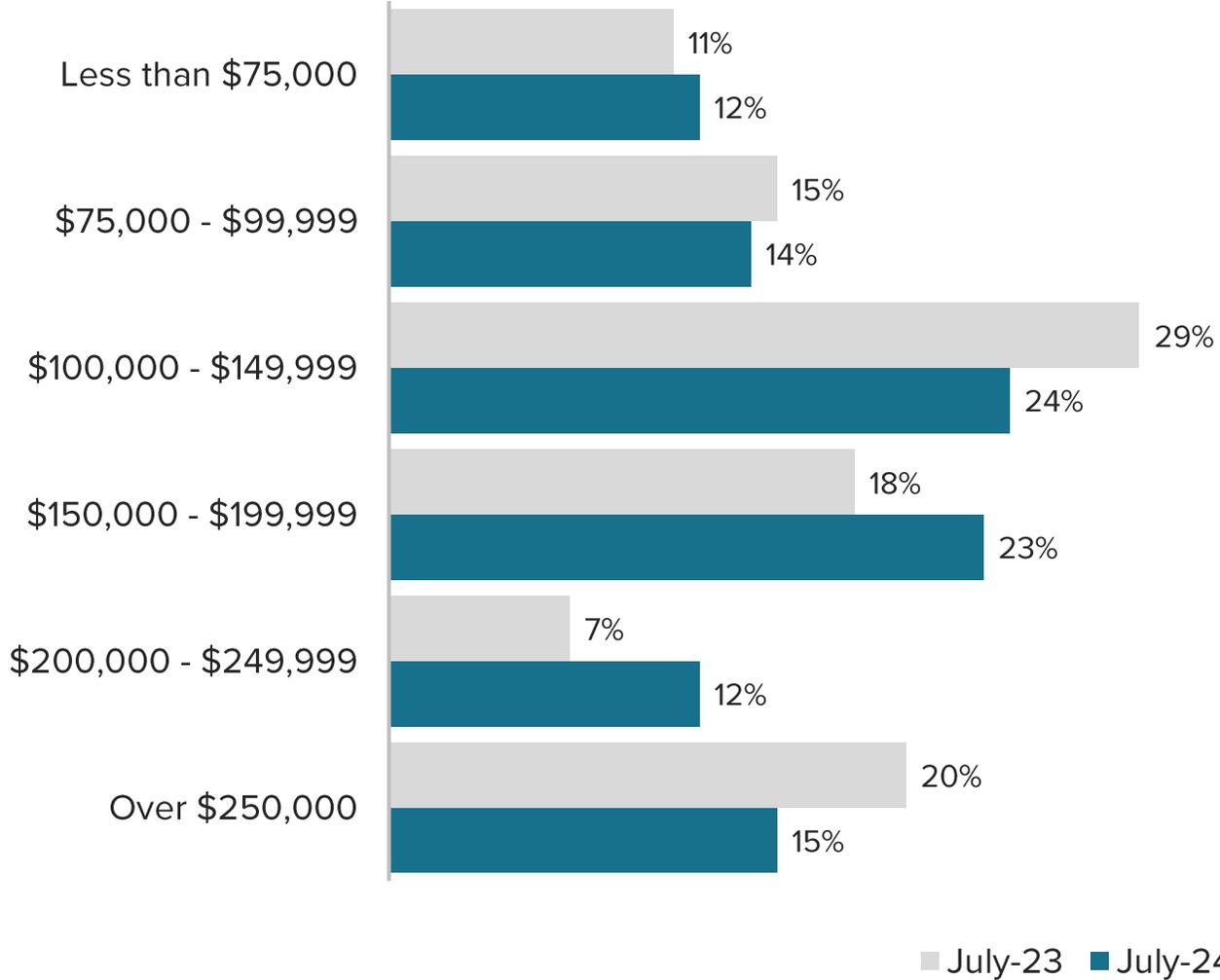
# DETAILED FINDINGS | VISITOR RACE & GENDER<sup>1</sup>



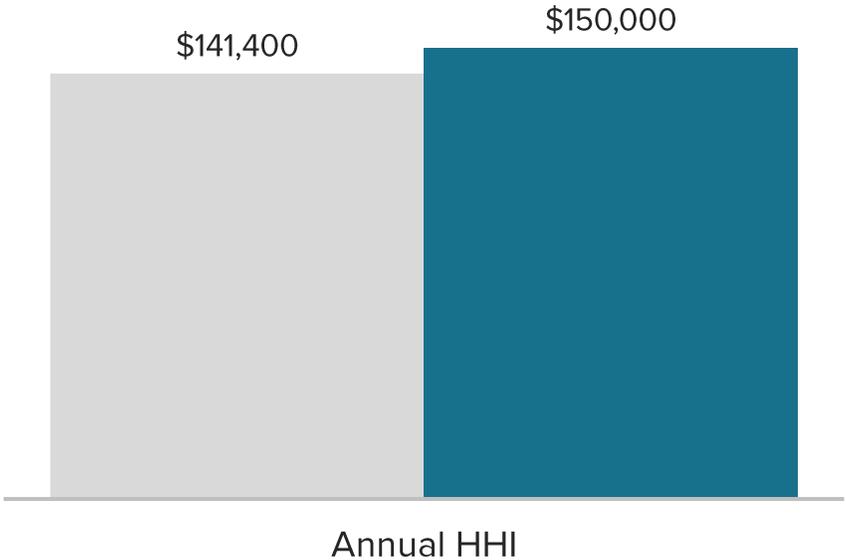
<sup>1</sup>Of person interviewed. Females are generally more likely to agree to participate in survey research.

■ July-23 ■ July-24

# DETAILED FINDINGS | VISITOR INCOME



## Median Household Income





# 3c

DETAILED FINDINGS:  
TRIP  
EXPERIENCE

## TRAVEL PARTY SIZE

3.6



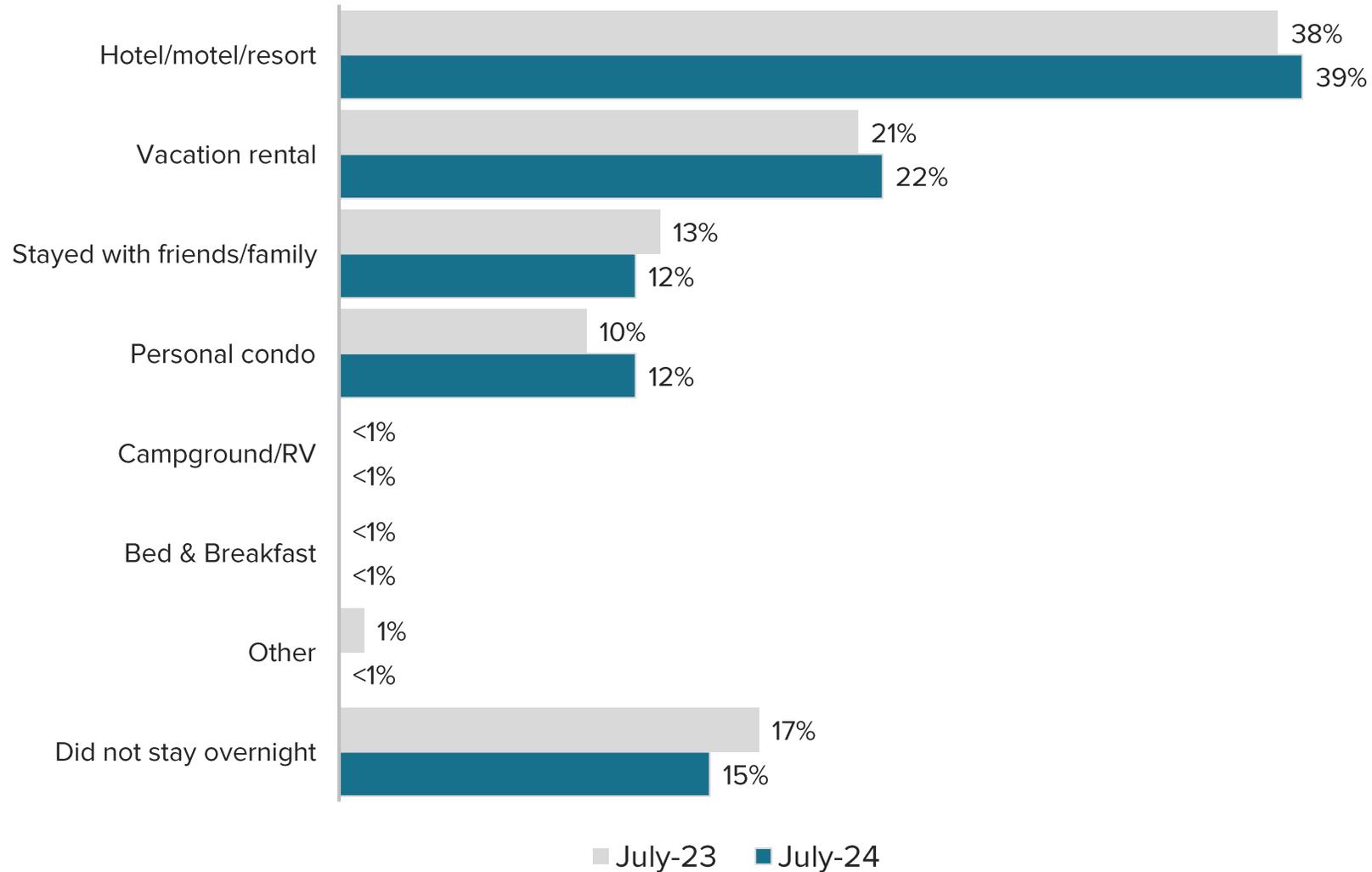
## NIGHTS STAYED

4.8

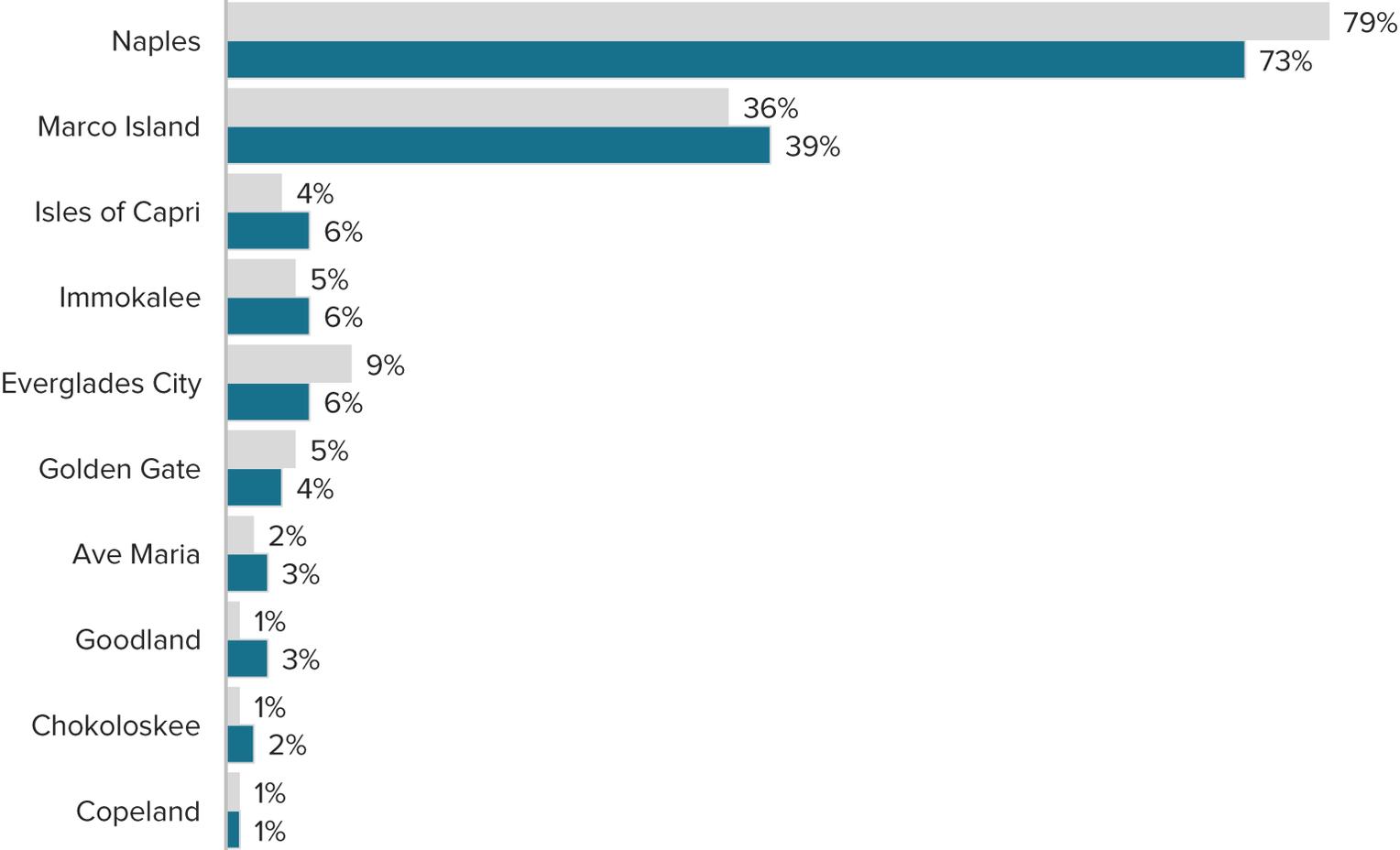


■ July-23   ■ July-24

# DETAILED FINDINGS | TYPE OF ACCOMODATIONS



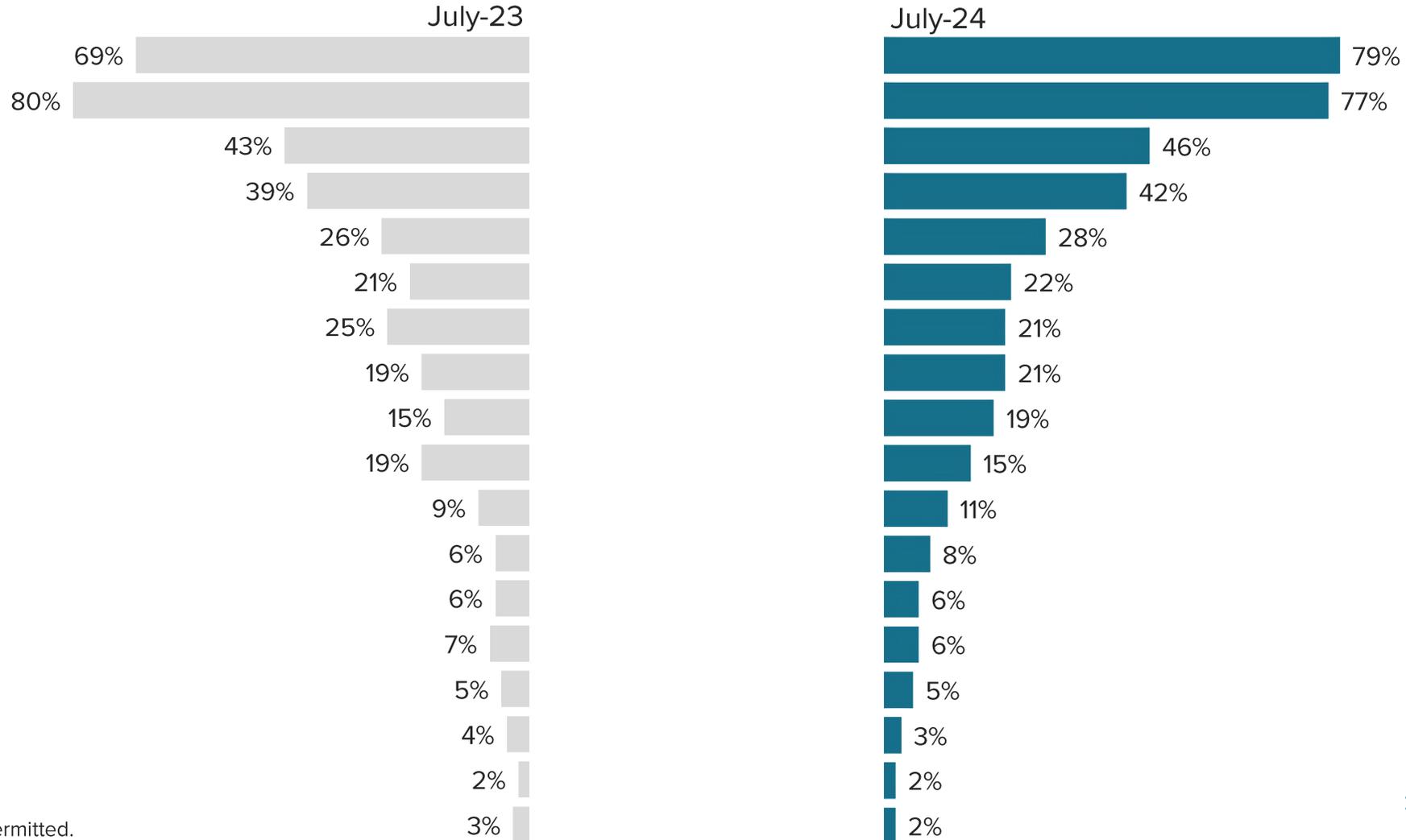
# DETAILED FINDINGS | AREAS VISITED<sup>1</sup>



■ July-23 ■ July-24

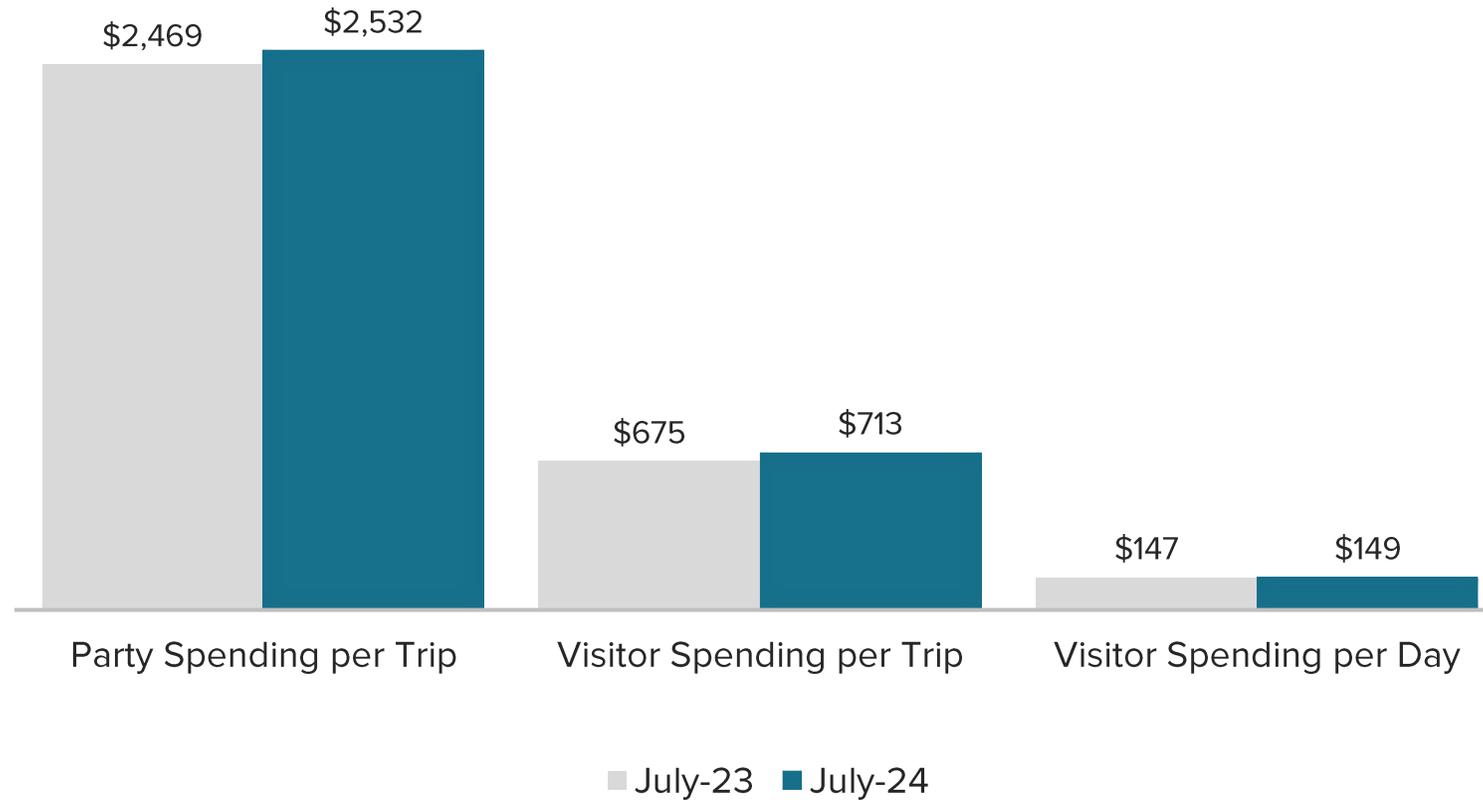
<sup>1</sup>Multiple responses permitted.

# DETAILED FINDINGS | TRIP ACTIVITIES<sup>1</sup>



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

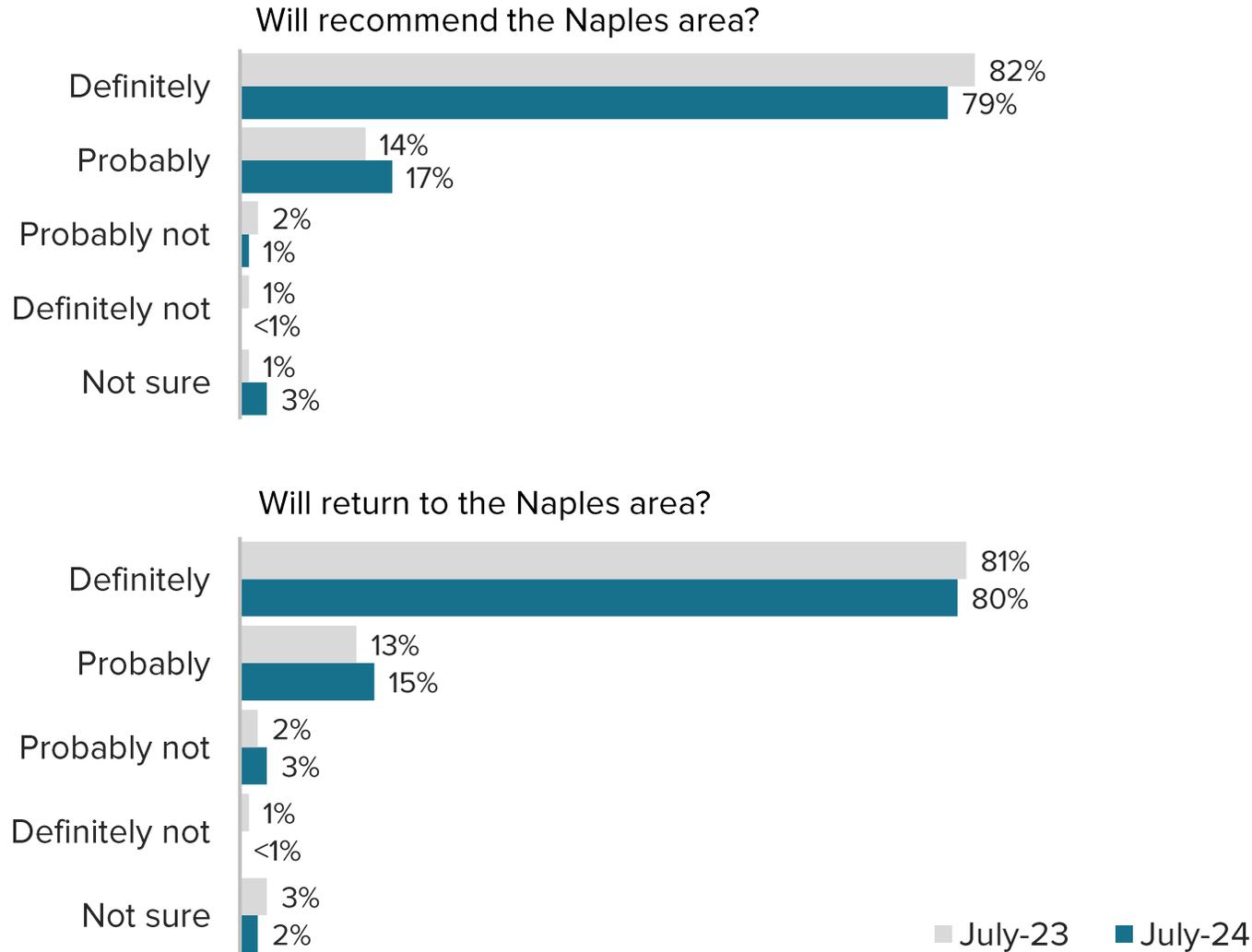
# DETAILED FINDINGS | VISITOR SPENDING



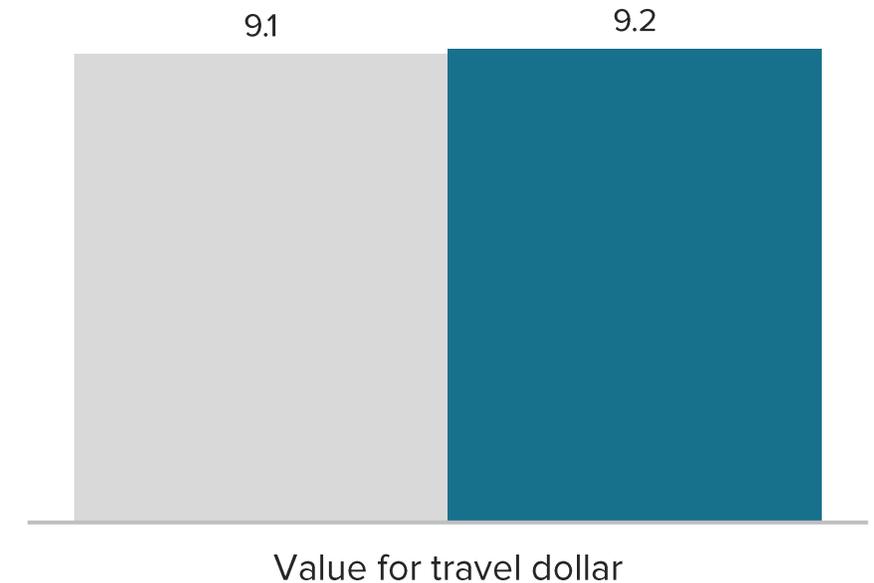


# 3d

DETAILED FINDINGS:  
POST-TRIP  
EVALUATION



## 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.



# 4a

MONTHLY  
DESTINATION  
COMPARISONS  
(NOT UPDATED  
W/ JULY DATA YET)



# 4b

CALENDAR YTD  
DESTINATION  
COMPARISONS  
(NOT UPDATED  
W/ JULY DATA YET)



# 4c

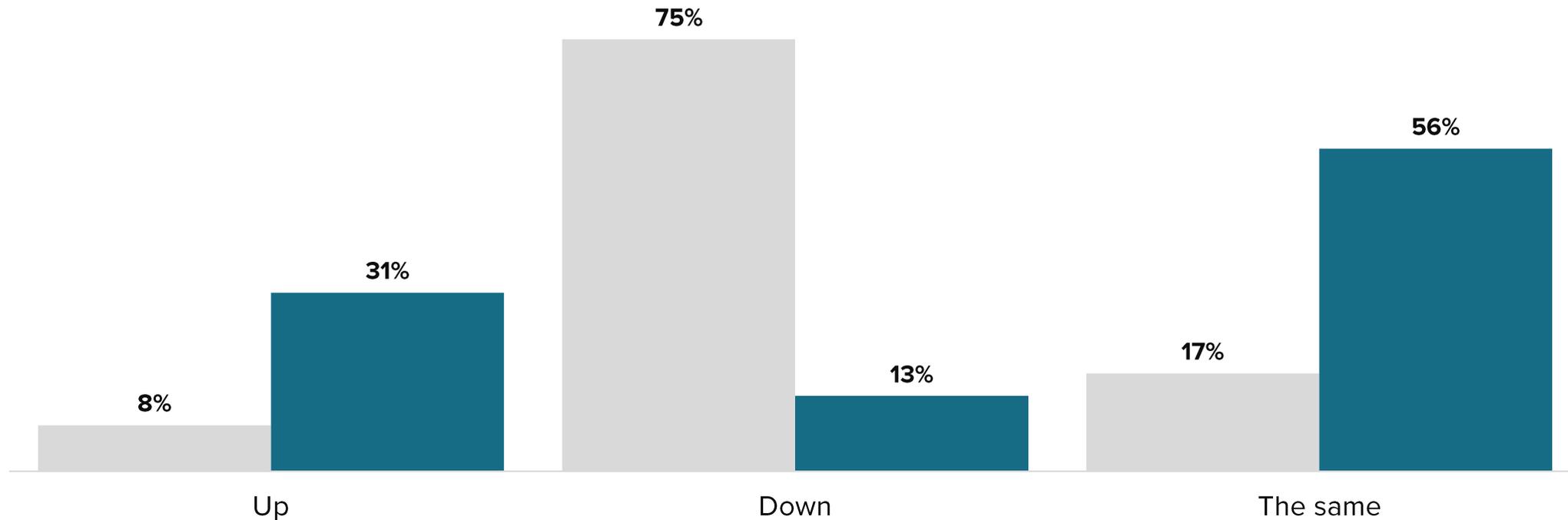
FISCAL YTD  
DESTINATION  
COMPARISONS  
(NOT UPDATED  
W/ JULY DATA YET)



5

OCCUPANCY  
BAROMETER

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



<sup>1</sup>Source: Data provided by Collier County hotel and vacation rental partners who respond to DSG's Monthly Occupancy Survey

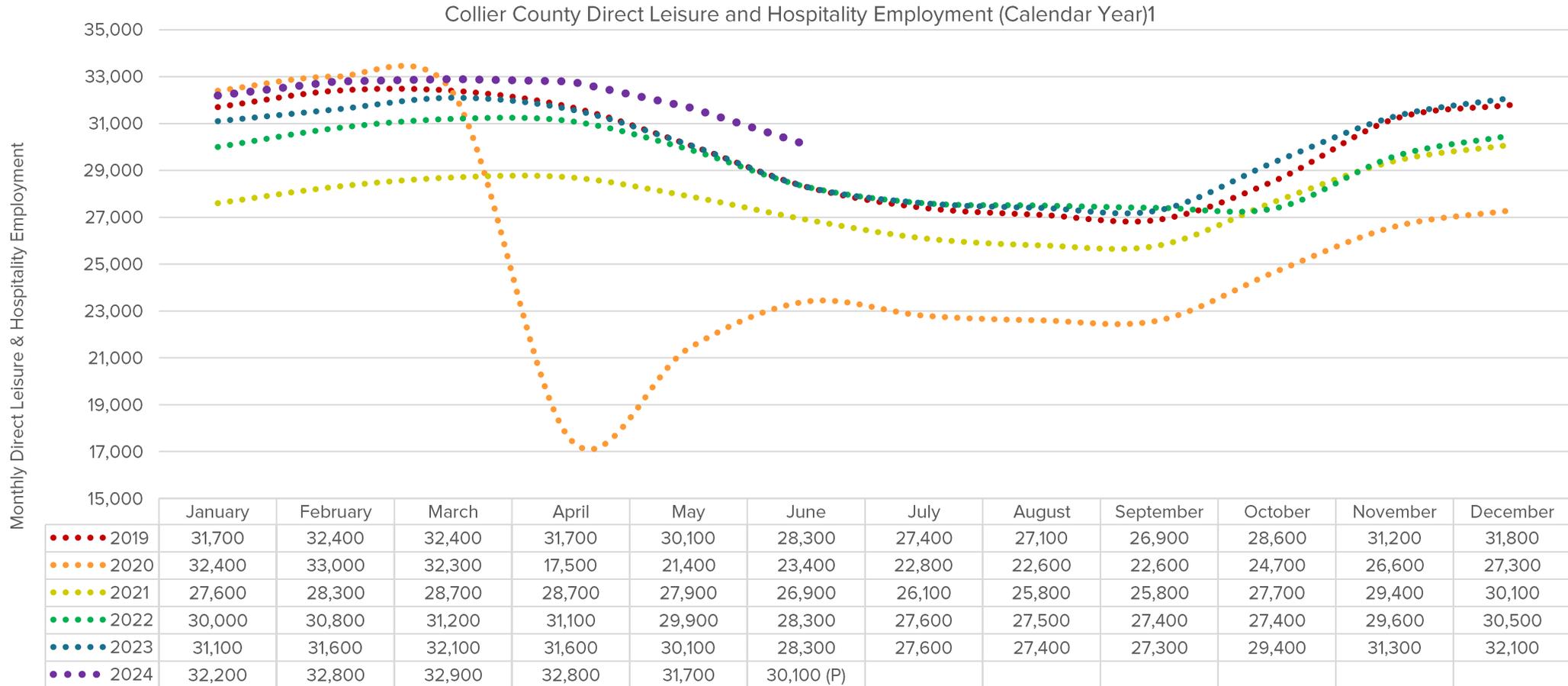
■ July-23 ■ July-24



# 6

INDUSTRY  
DATA

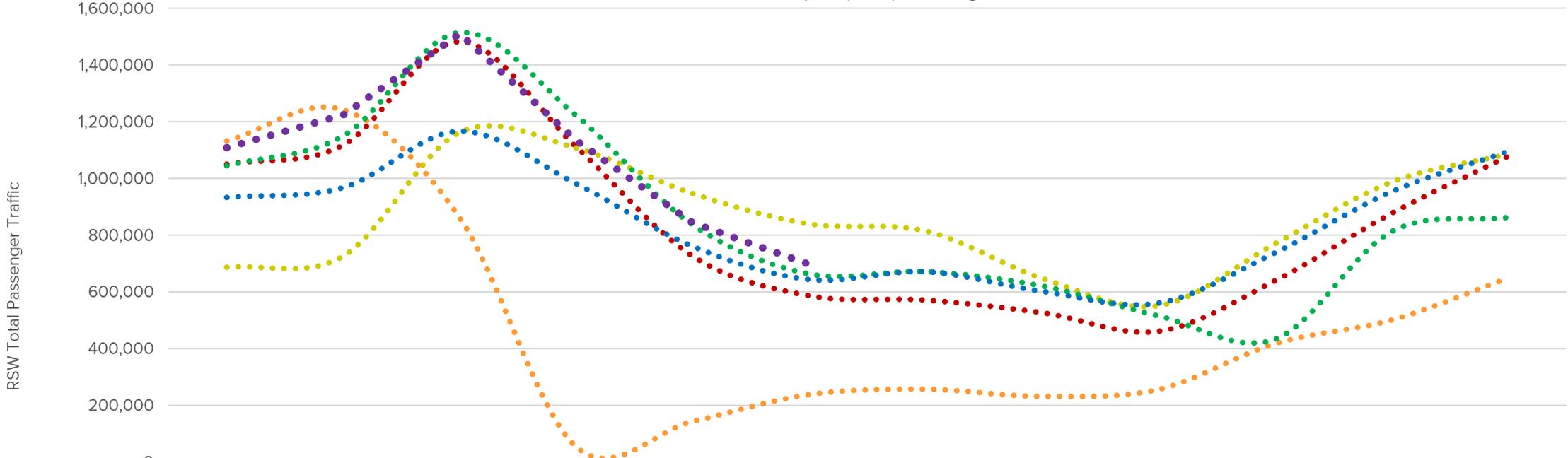
# INDUSTRY DATA | CURRENT EMPLOYMENT



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

# INDUSTRY DATA | RSW PASSENGER TRAFFIC

Southwest Florida International Airport (RSW) Passenger Traffic<sup>1</sup>



	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						

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

# INDUSTRY DATA | LICENSED RENTAL UNITS

July 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
<b>Total</b>	<b>6,044</b>	<b>1,665</b>	<b>5,330</b>	<b>13,039<sup>2</sup></b>

<sup>1</sup>SOURCE: 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 couple is silhouetted against a dramatic sunset sky filled with large, golden clouds. They are standing on a surfboard in the ocean, holding paddles. The sun is low on the horizon, creating a warm, orange glow. The overall scene is peaceful and scenic.

THANK YOU