

NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau
November 2023 Monthly Dashboard



NOVEMBER 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 was up, while the Occupancy Rate was down. The main reason for this is that there were more lodging units available in November 2023 compared to November 2022.



Direct Spending and Economic Impact increased compared to November 2022 largely driven by increases in Average Daily Rate as well as restaurant and shopping spending. These changes can largely be attributed to the amount of hurricane recovery workers in the area in November 2022 who spend less than typical leisure visitors.



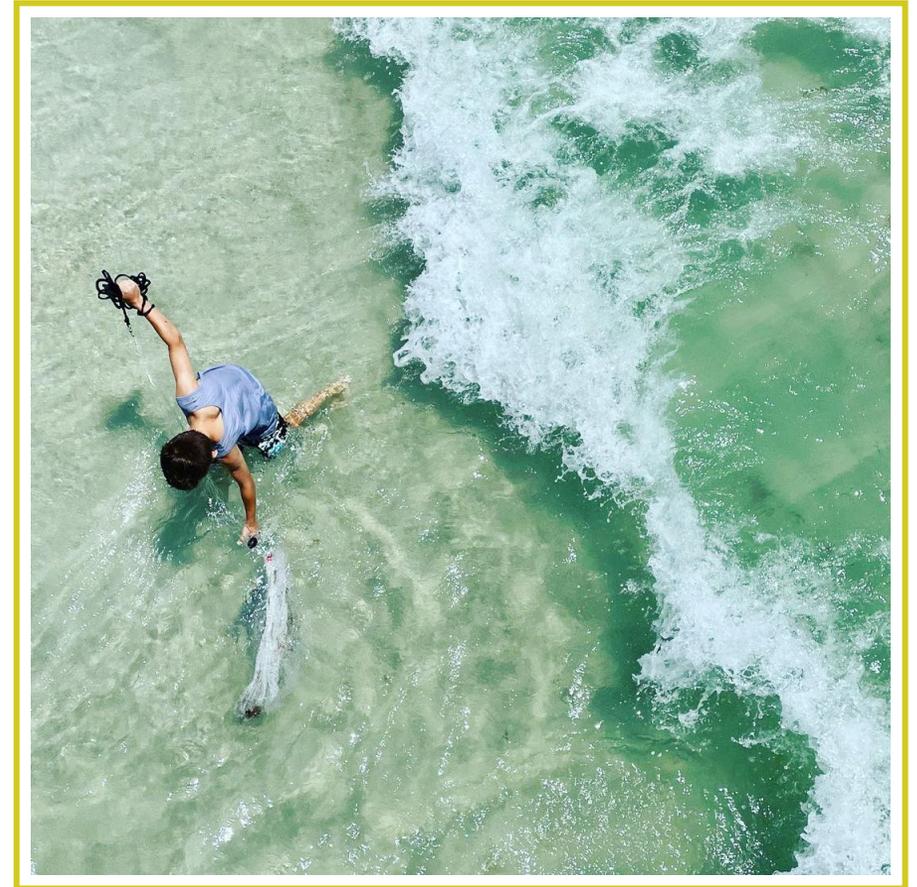
International visitation increased, largely due to an influx of European visitors.

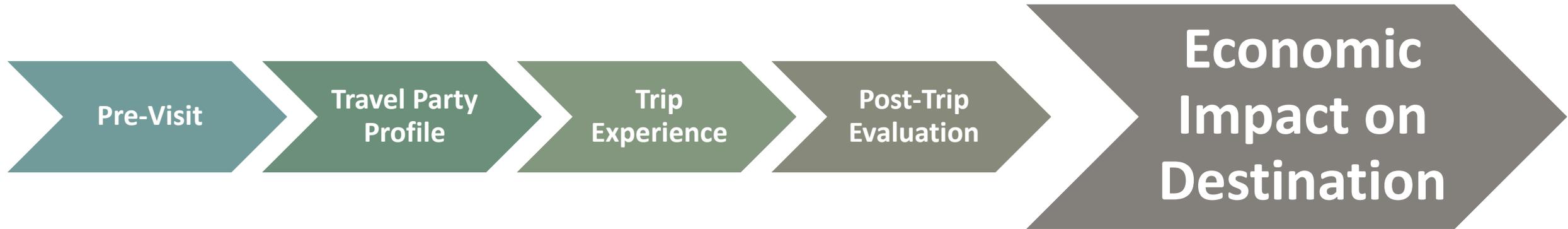


A greater percentage of visitors flew to the area in November 2023, a trend that has continued over the last few months of 2023.



Significantly more visitors would definitely recommend and will definitely return to the area compared to November 2022, likely due to recovery efforts that were occurring in market last year.

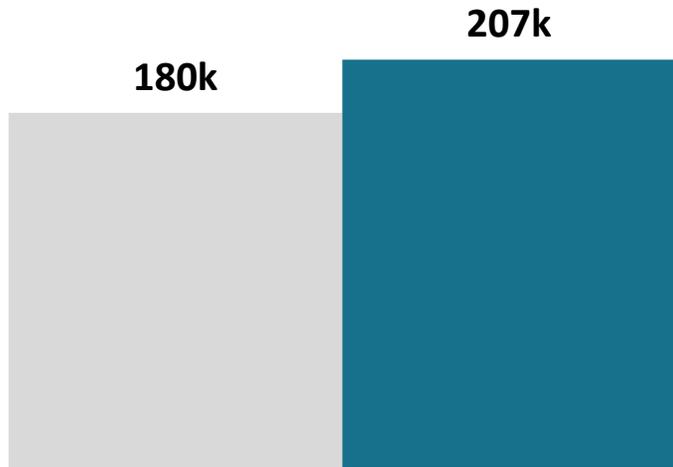




NOVEMBER 2023 VISITATION & ROOM NIGHTS

VISITORS

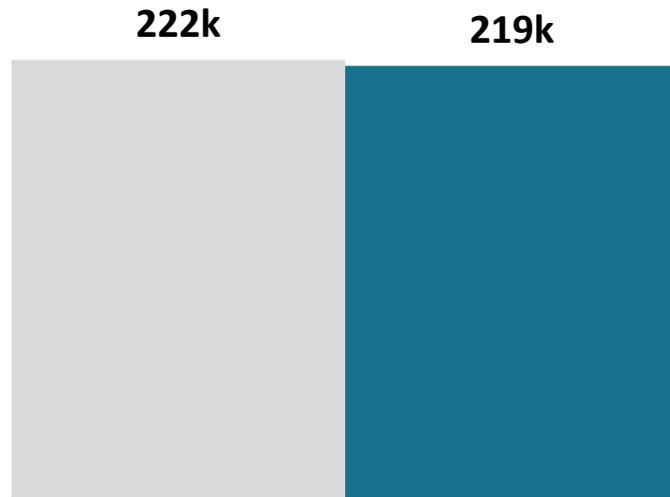
207,300



+ 15.0% from 2022

ROOM NIGHTS

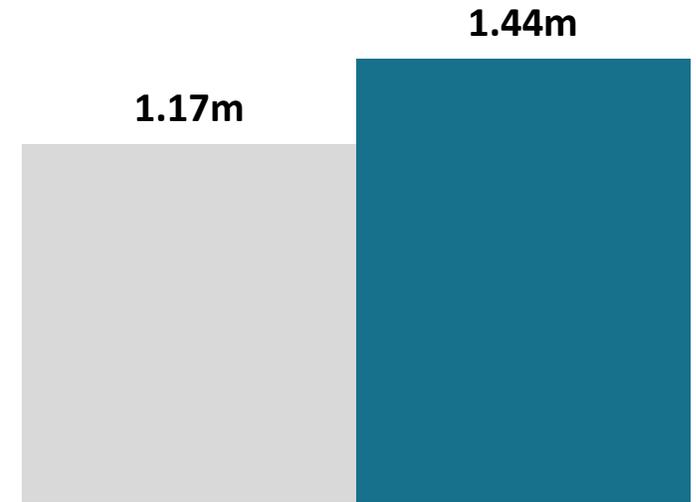
219,400



- 1.3% from 2022

VISITOR DAYS

1,442,800

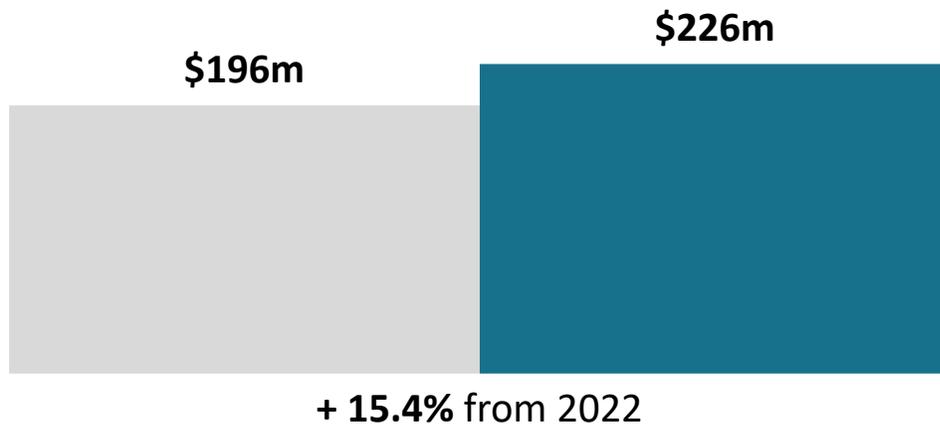


+ 23.8% from 2022

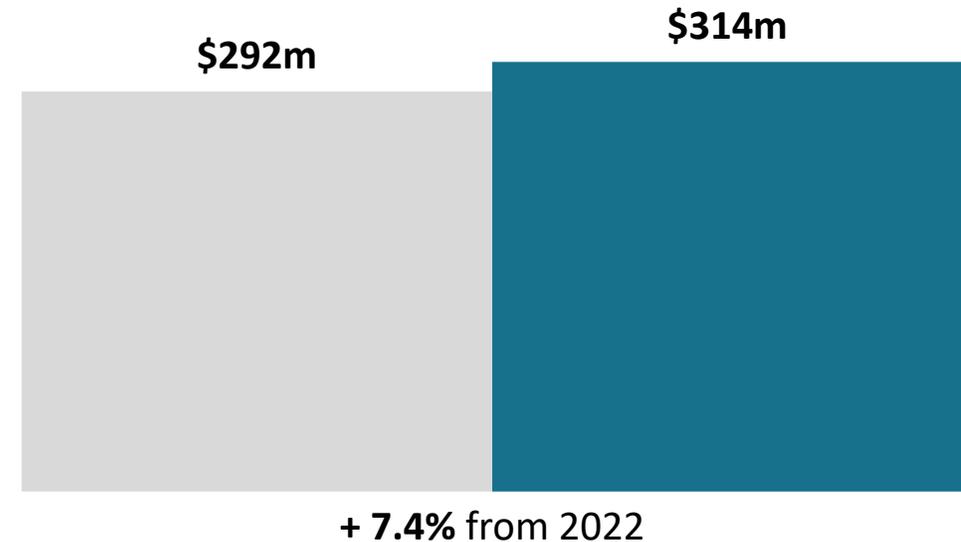
■ Nov-22 ■ Nov-23

NOVEMBER 2023 SPENDING & ECONOMIC IMPACT¹

DIRECT SPENDING
\$226,001,500



ECONOMIC IMPACT
\$313,690,100



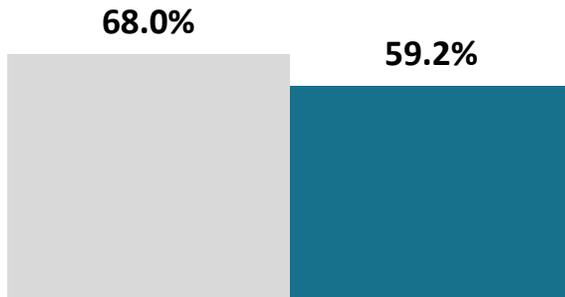
■ Nov-22 ■ Nov-23

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

NOVEMBER 2023 OVERALL LODGING METRICS¹

OCCUPANCY RATE

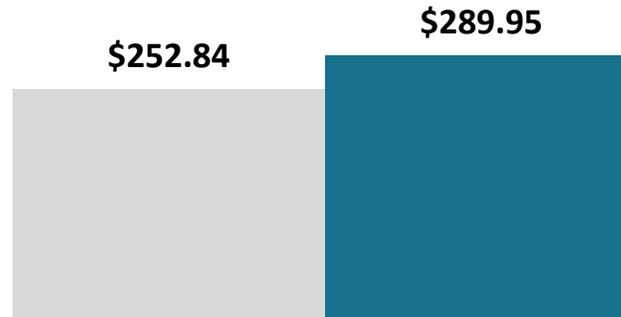
59.2%



- 12.9% from 2022

AVERAGE DAILY RATE

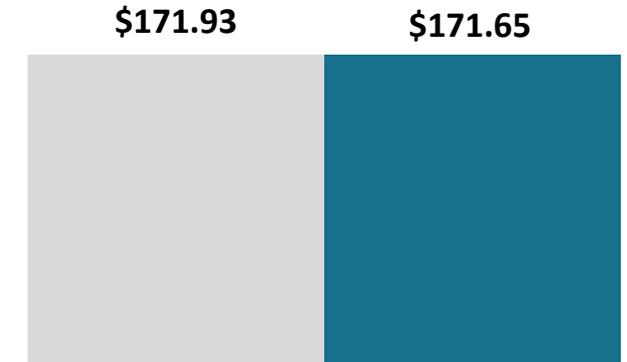
\$289.95



+ 14.7% from 2022

REVENUE PER AVAILABLE ROOM

\$171.65



- 0.2% from 2022

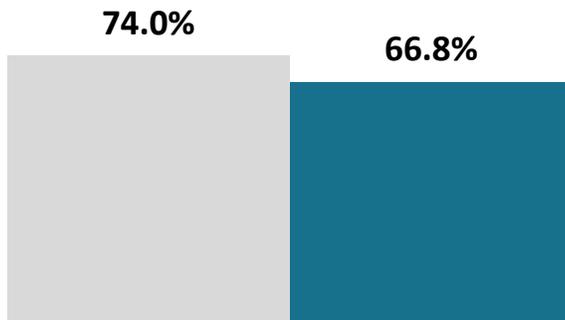
■ Nov-22 ■ Nov-23

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

NOVEMBER 2023 HOTEL LODGING METRICS¹

OCCUPANCY RATE

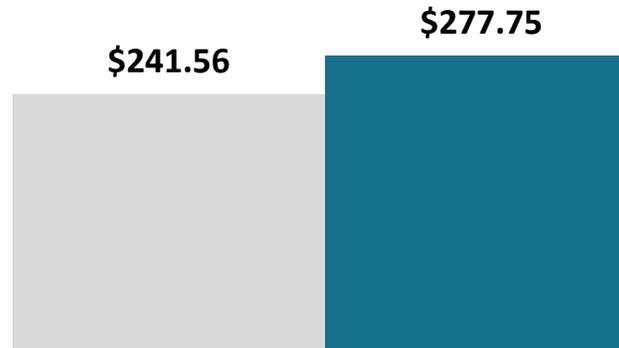
66.8%



- 9.7% from 2022

AVERAGE DAILY RATE

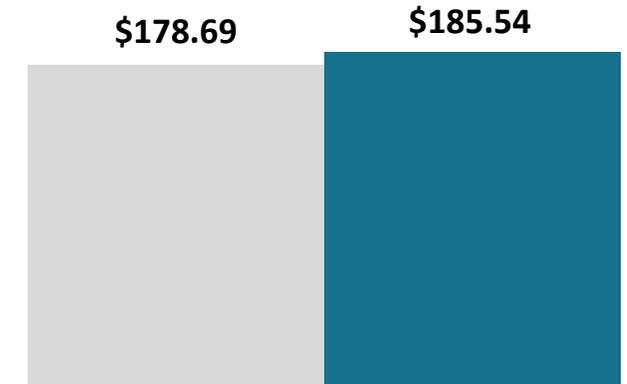
\$277.75



+ 15.0% from 2022

REVENUE PER AVAILABLE ROOM

\$185.54

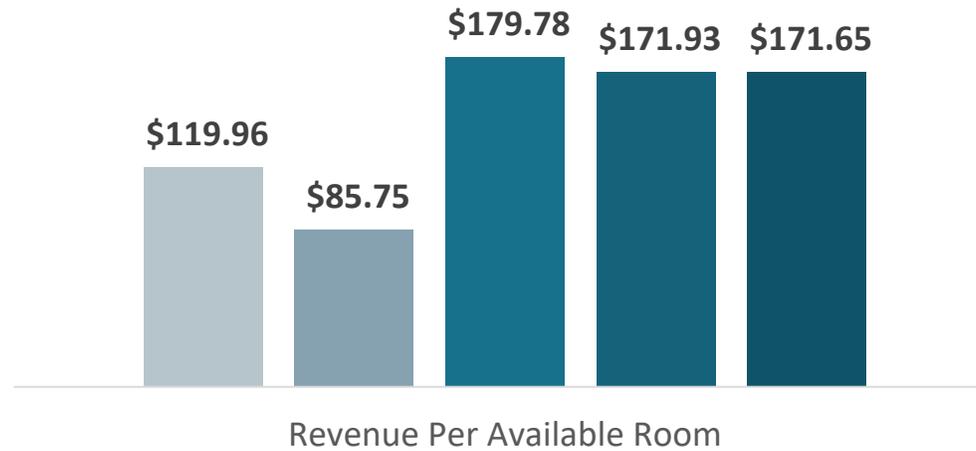
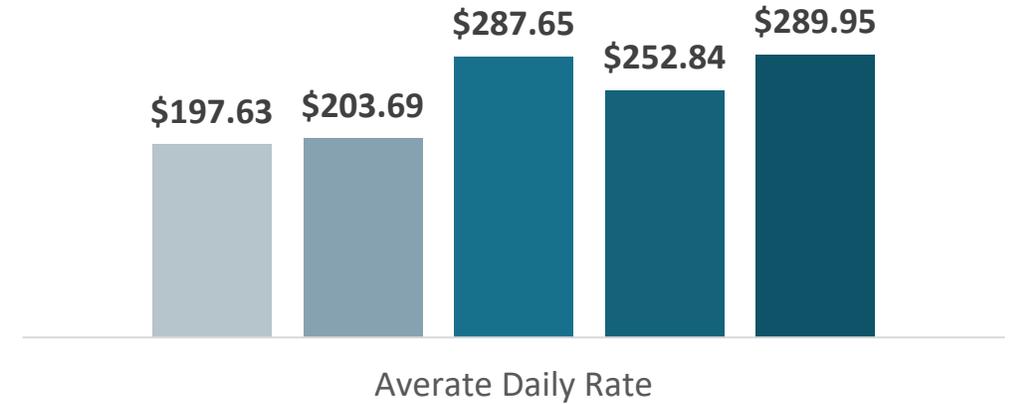
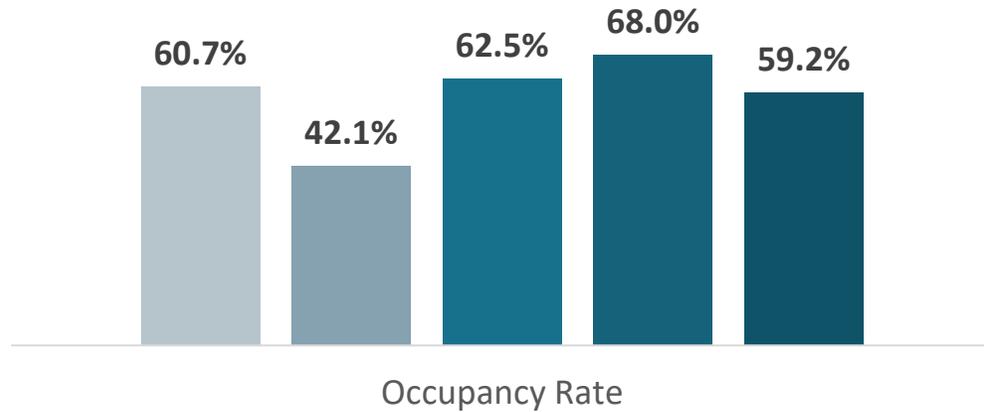


+ 3.8% from 2022

■ Nov-22 ■ Nov-23

¹Source: STR Reports

NOVEMBER 2019-2023 OVERALL LODGING METRICS¹



■ 2019 ■ 2020 ■ 2021 ■ 2022 ■ 2023

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

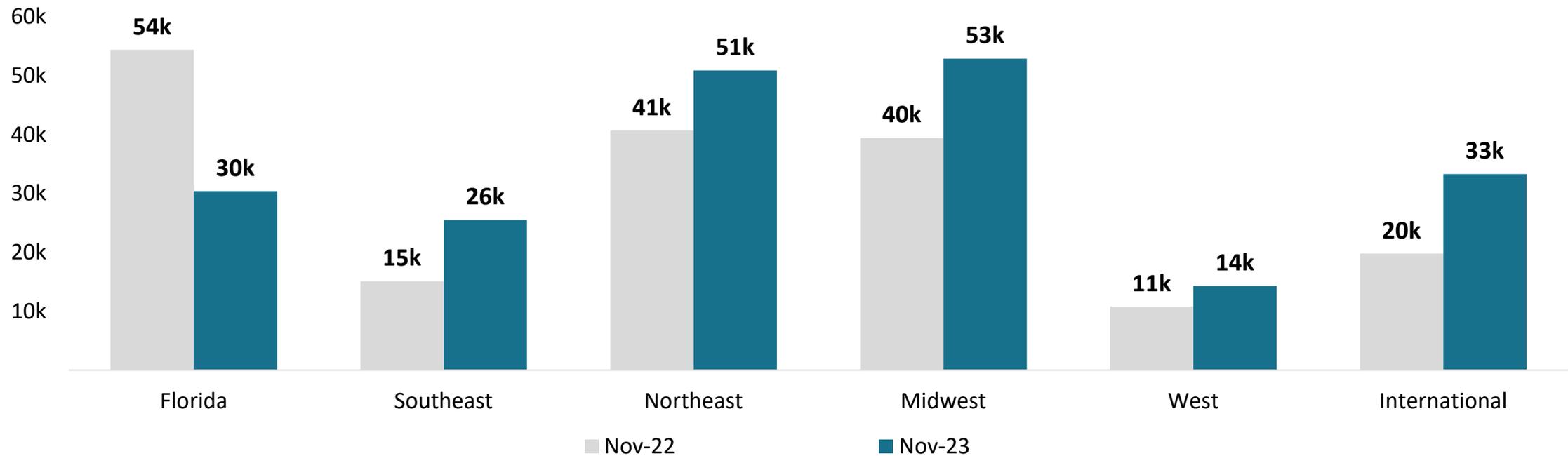
VISITOR ORIGIN

FLORIDA VISITORS

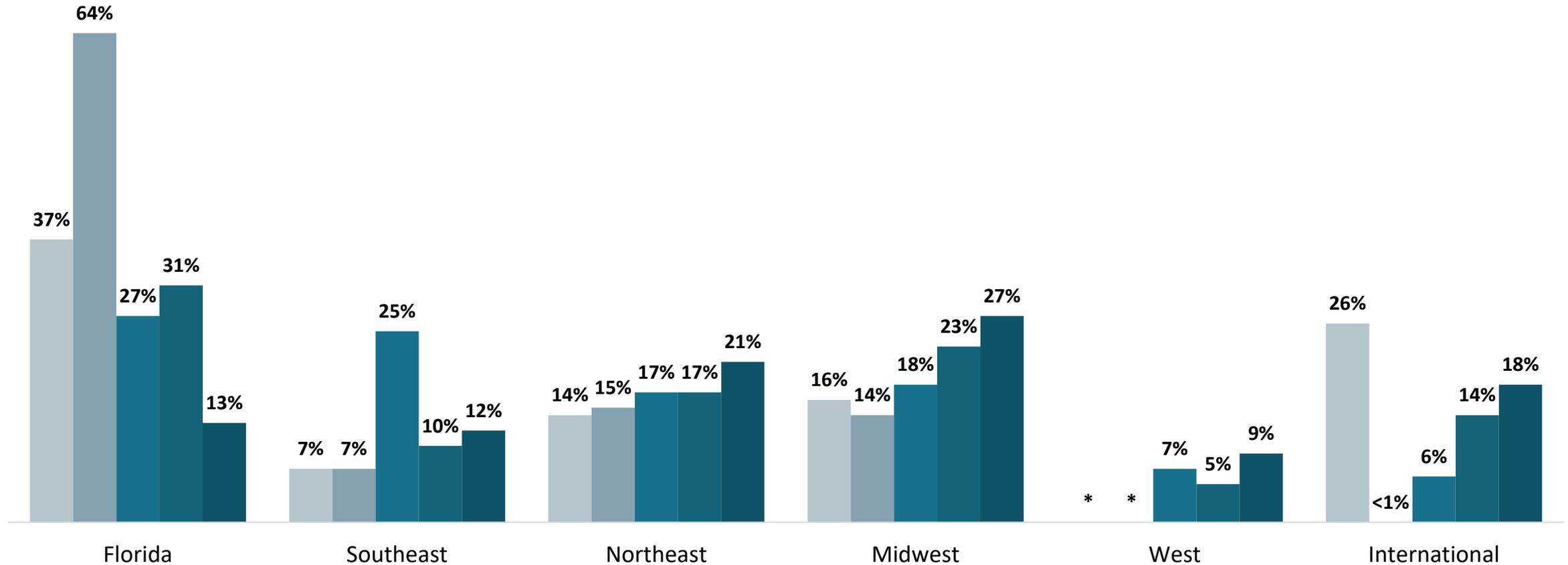
30,400

OUT-OF-STATE VISITORS

176,900



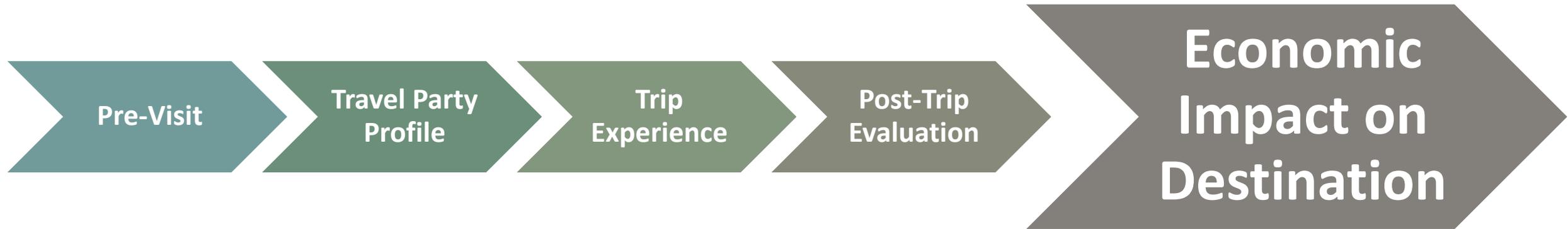
NOVEMBER 2019-2023 OVERNIGHT VISITOR ORIGIN



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

■ Nov-19 ■ Nov-20 ■ Nov-21 ■ Nov-22 ■ Nov-23

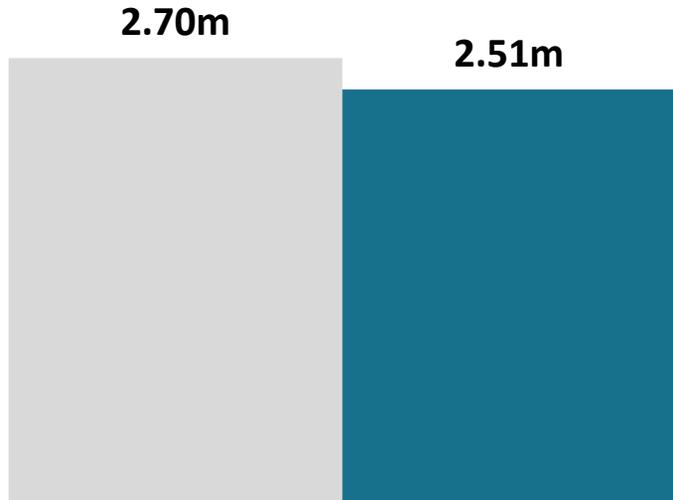
TOURISM CALENDAR YEAR-TO-DATE (CYTD)



CYTD VISITATION METRICS

CYTD VISITORS

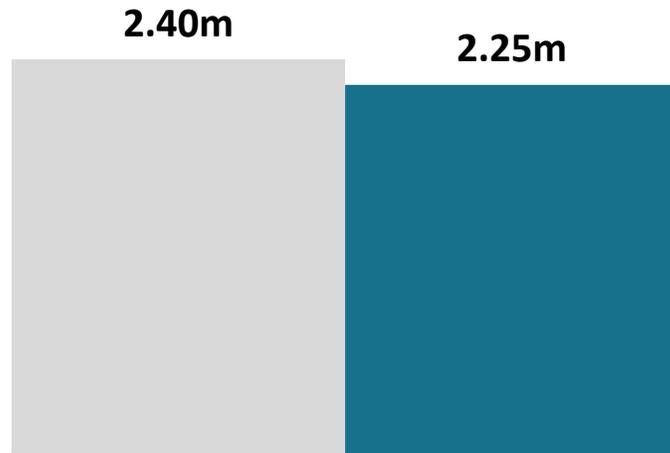
2,507,500



- 7.1% from 2022

CYTD ROOM NIGHTS

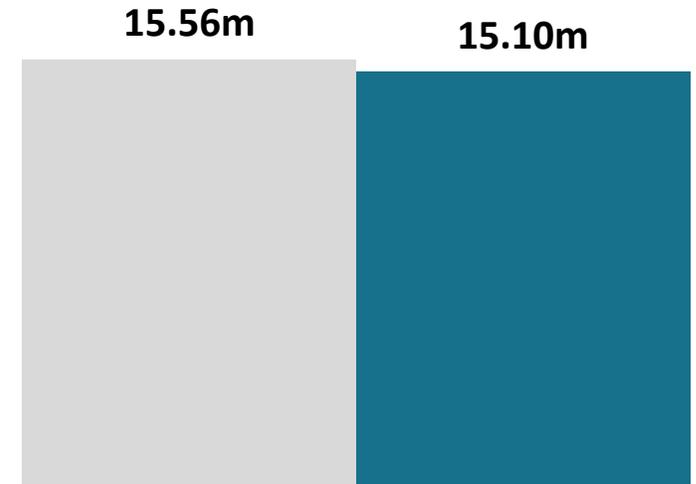
2,249,000



- 6.5% from 2022

CYTD VISITOR DAYS

15,097,600



- 3.0% from 2022

■ Nov-22 ■ Nov-23

CYTD SPENDING & ECONOMIC IMPACT

CYTD DIRECT SPENDING

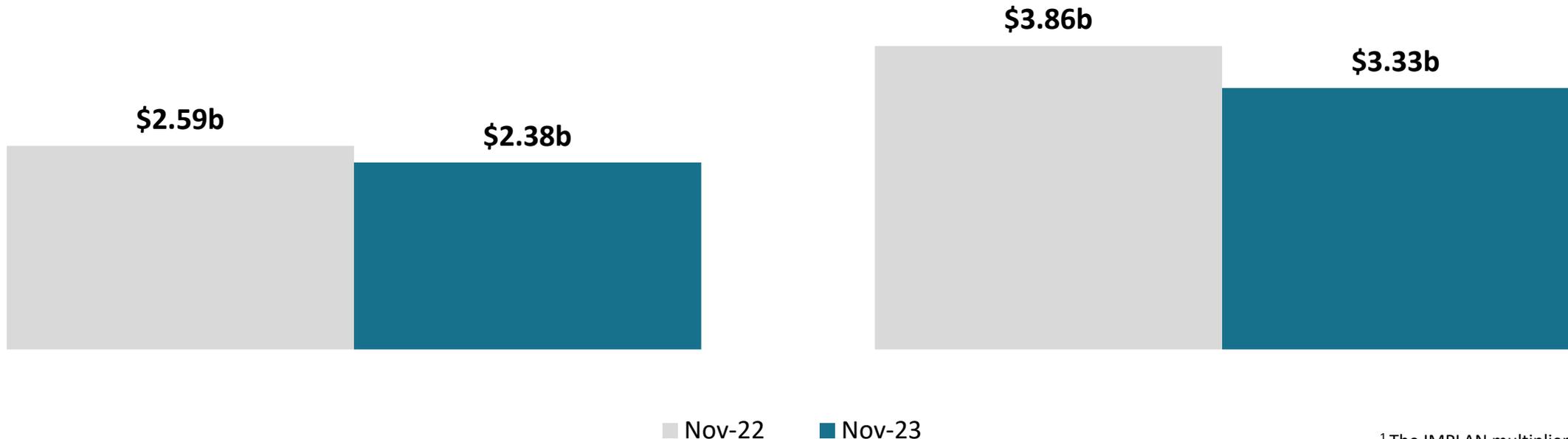
\$2,378,514,000

- 8.1% from 2022

CYTD ECONOMIC IMPACT

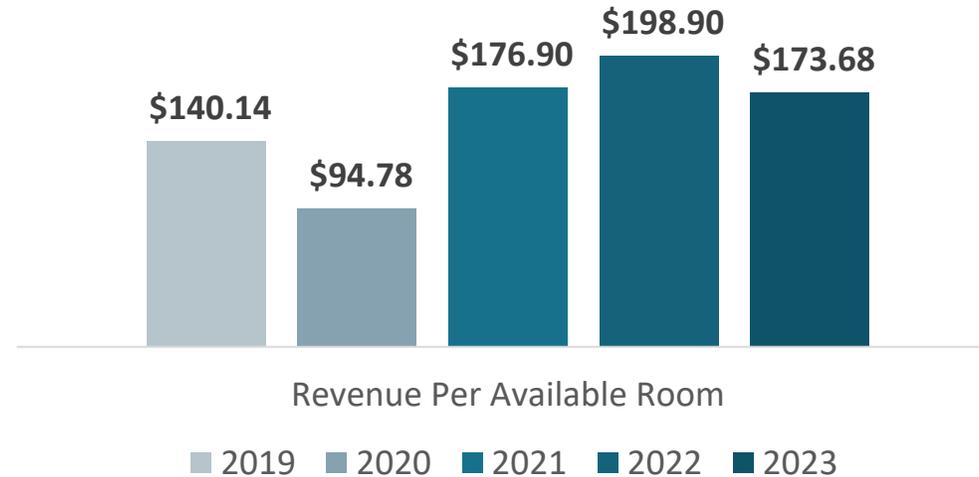
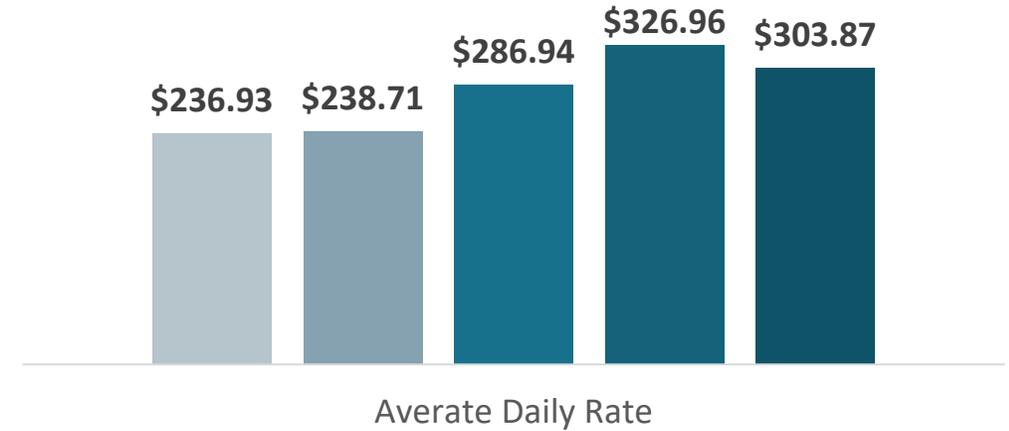
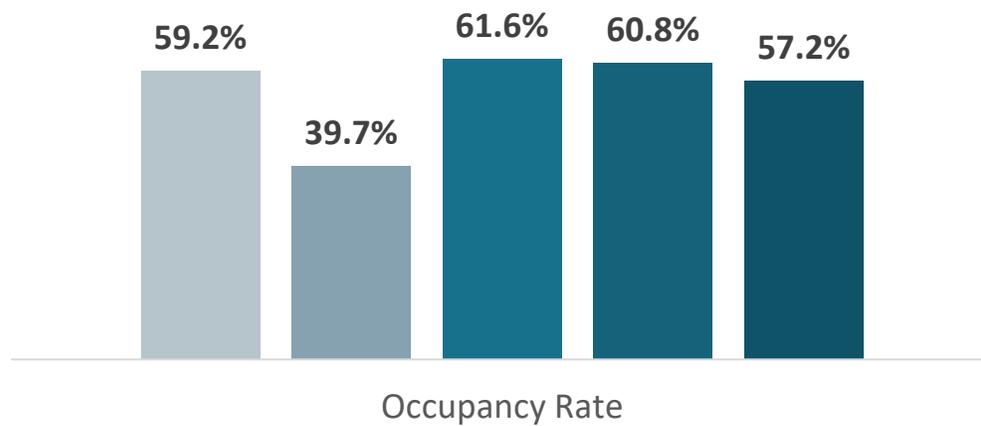
\$3,325,440,600

- 13.9% from 2022¹



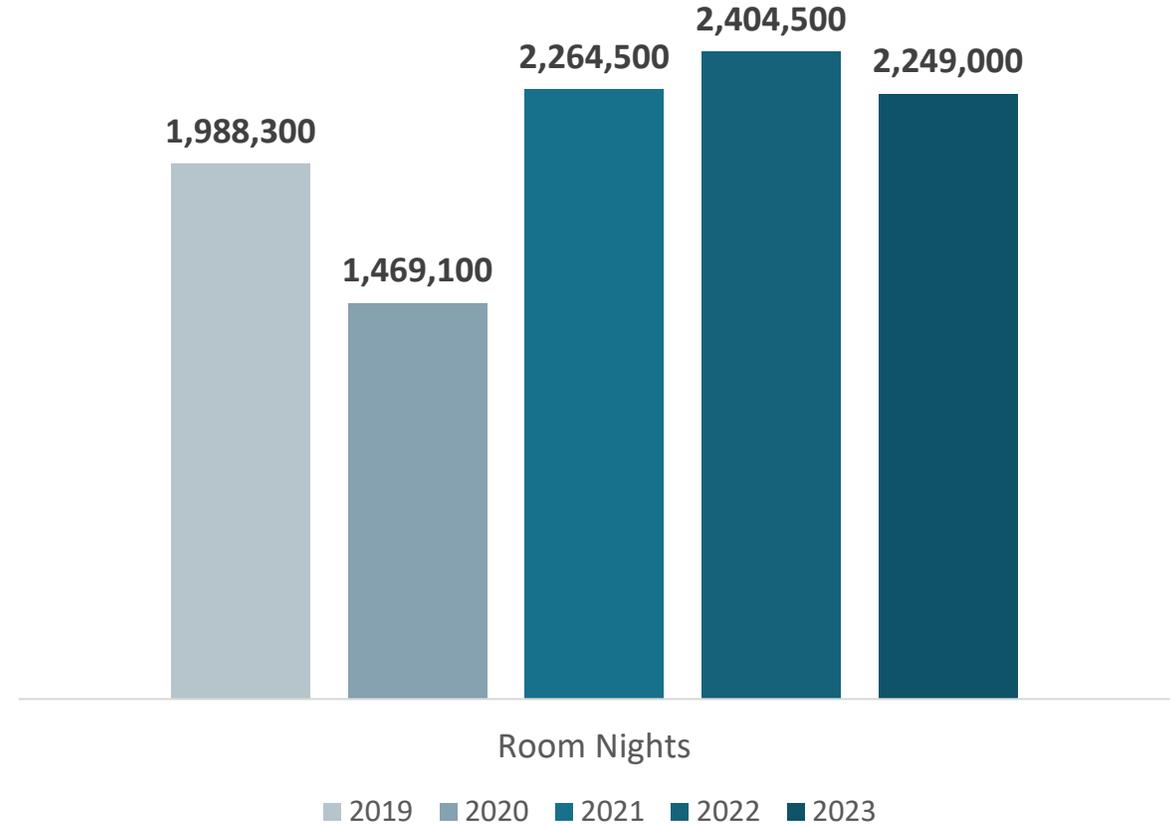
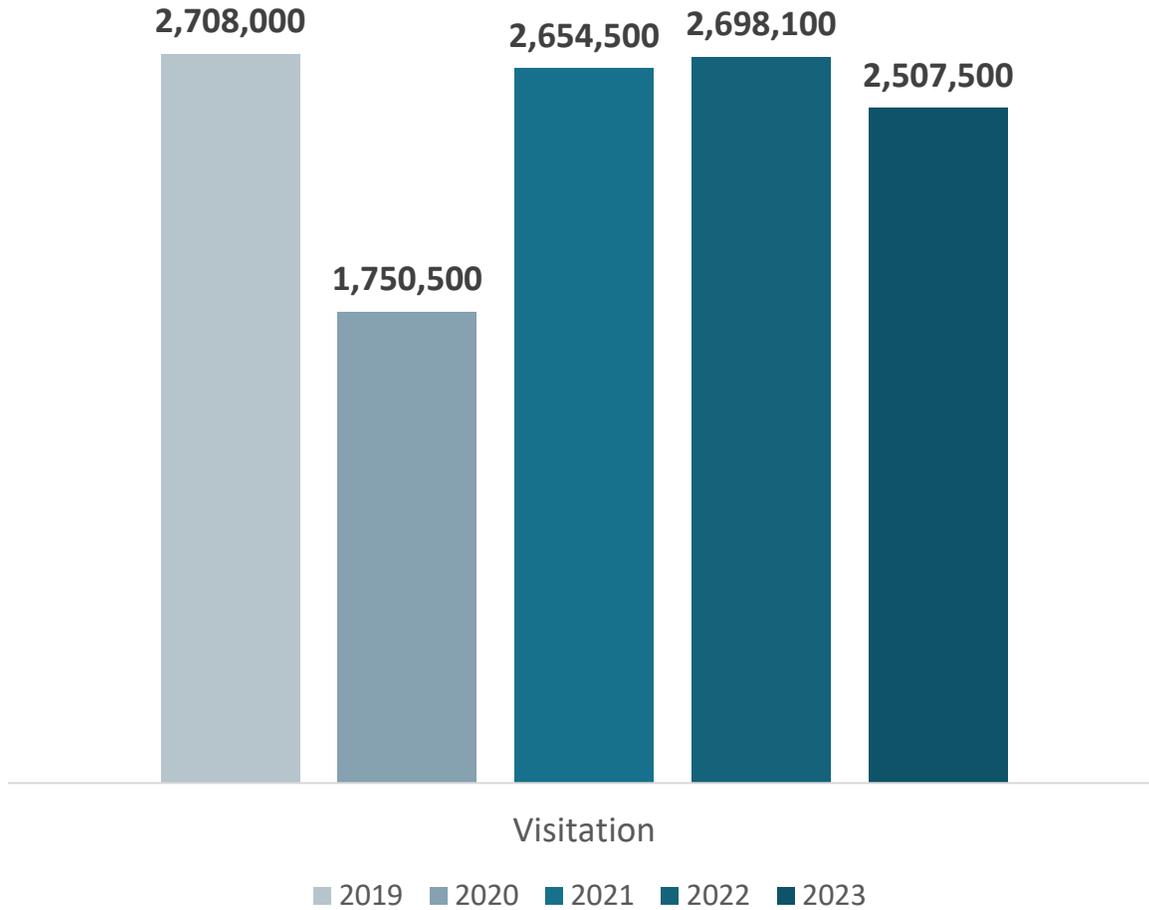
¹The IMPLAN multiplier for Collier County was 1.491 for 2022 and is 1.388 in 2023.

CYTD 2019-2023 OVERALL LODGING METRICS¹



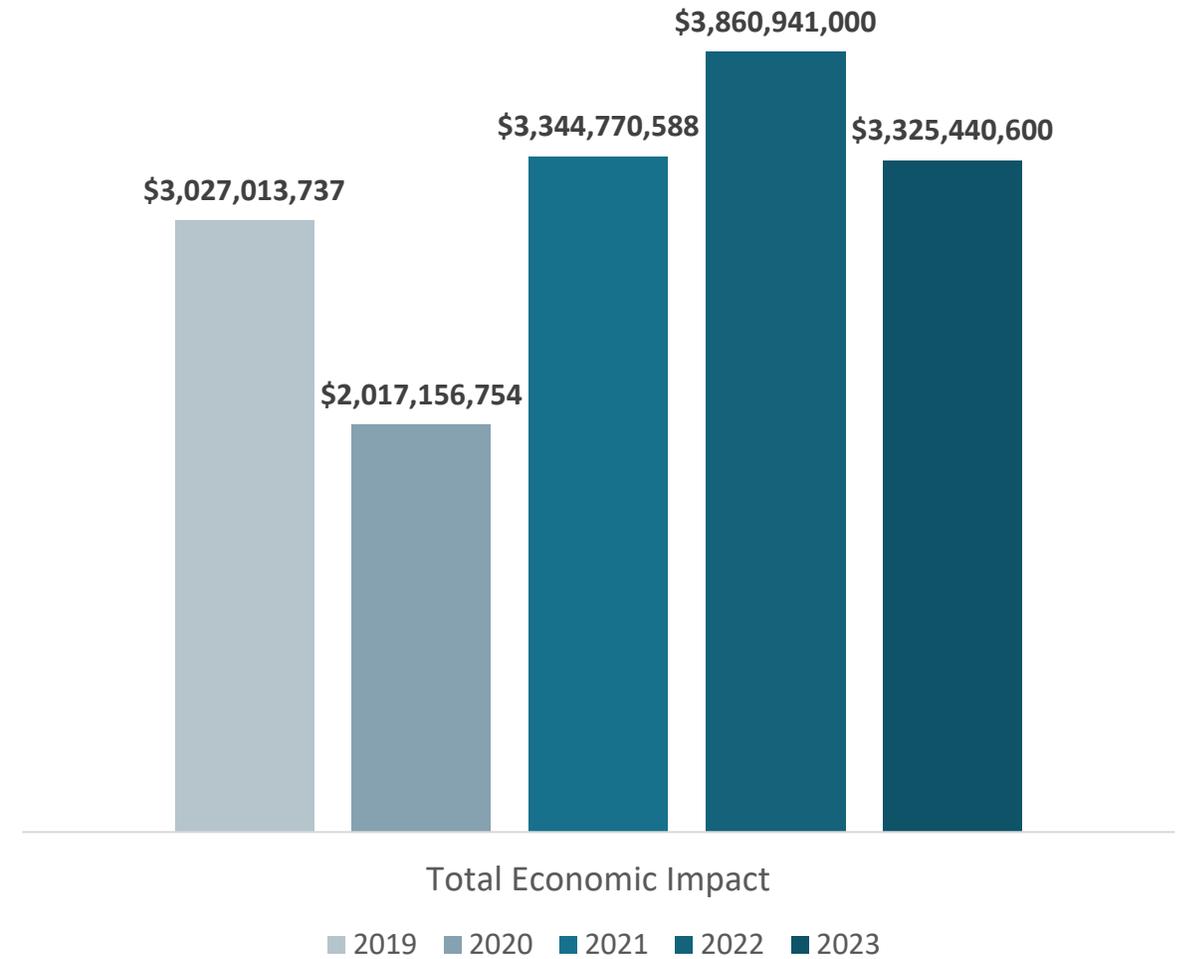
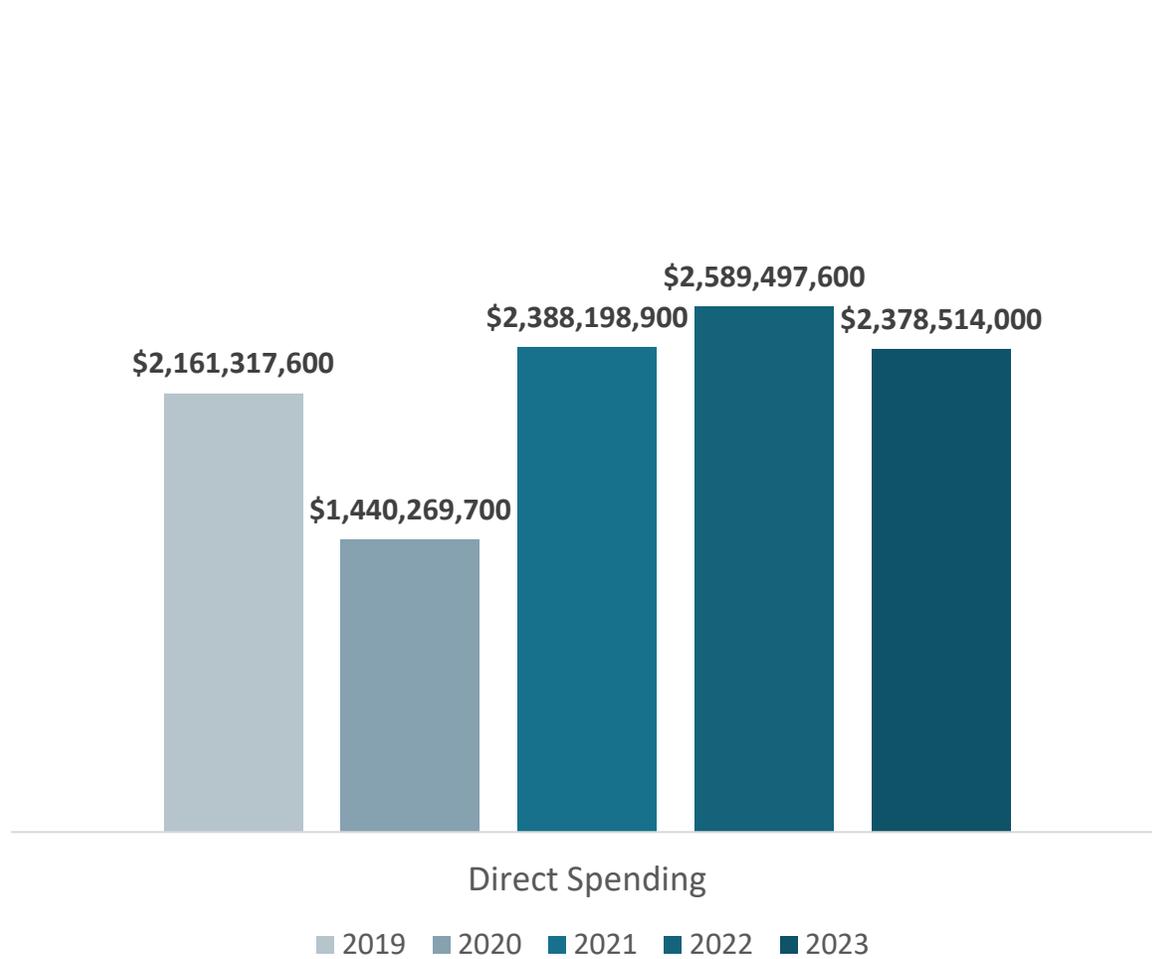
¹ Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

CYTD 2019-2023 VISITATION & ROOM NIGHTS¹



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

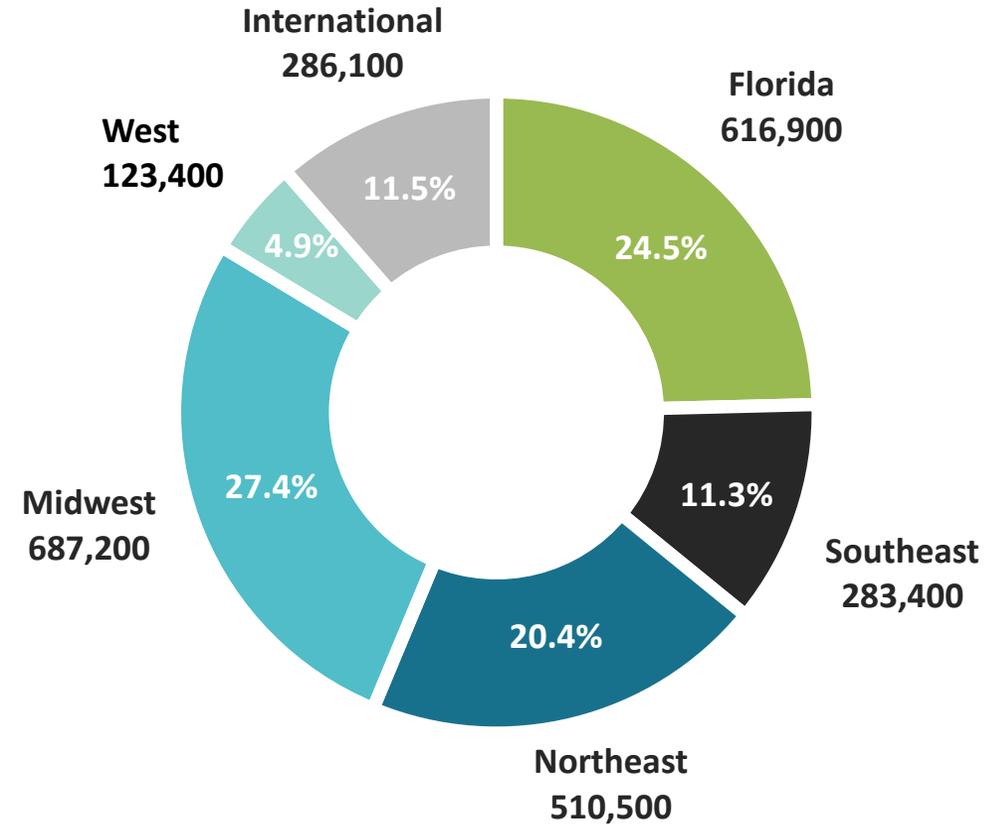
CYTD 2019-2023 SPENDING & ECONOMIC IMPACT¹

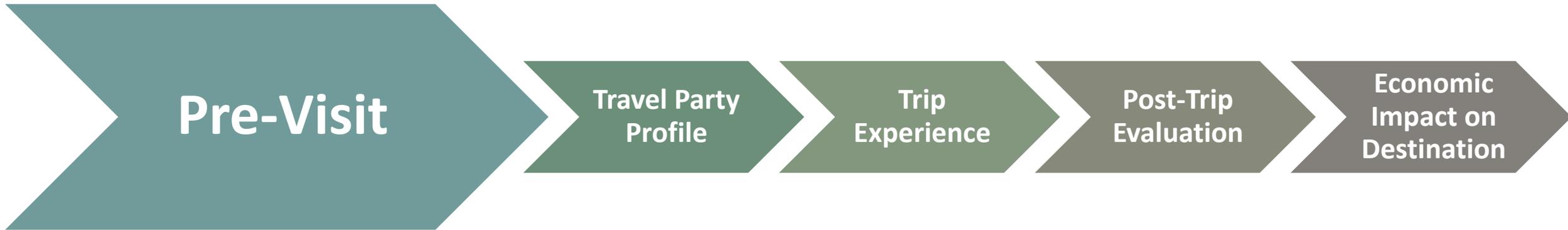


¹ Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

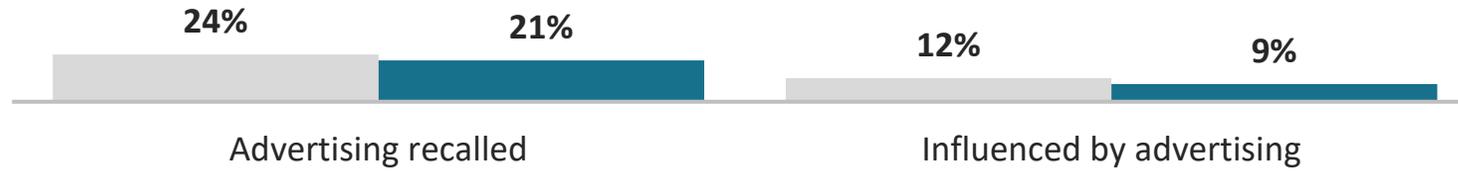
CYTD 2023 VISITOR ORIGIN MARKETS¹

Region	CYTD 2022		CYTD 2023		Percent Change (Δ%)	
	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	681,600	25.3%	616,900	24.5%	-9.5%	-2.6%
Southeast	317,500	11.8%	283,400	11.3%	-10.7%	-4.0%
Northeast	602,100	22.3%	510,500	20.4%	-15.2%	-8.8%
Midwest	742,400	27.5%	687,200	27.4%	-7.4%	-0.4%
West	142,000	5.3%	123,400	4.9%	-13.1%	-6.5%
Canada	71,500	2.6%	117,400	4.7%	64.2%	76.7%
Europe	85,900	3.2%	107,200	4.3%	24.8%	34.3%
C/S America	21,300	0.8%	32,500	1.3%	52.6%	64.2%
Other	33,800	1.2%	29,000	1.2%	-14.2%	-7.7%
Total	2,698,100	100.0%	2,507,500	100.0%		

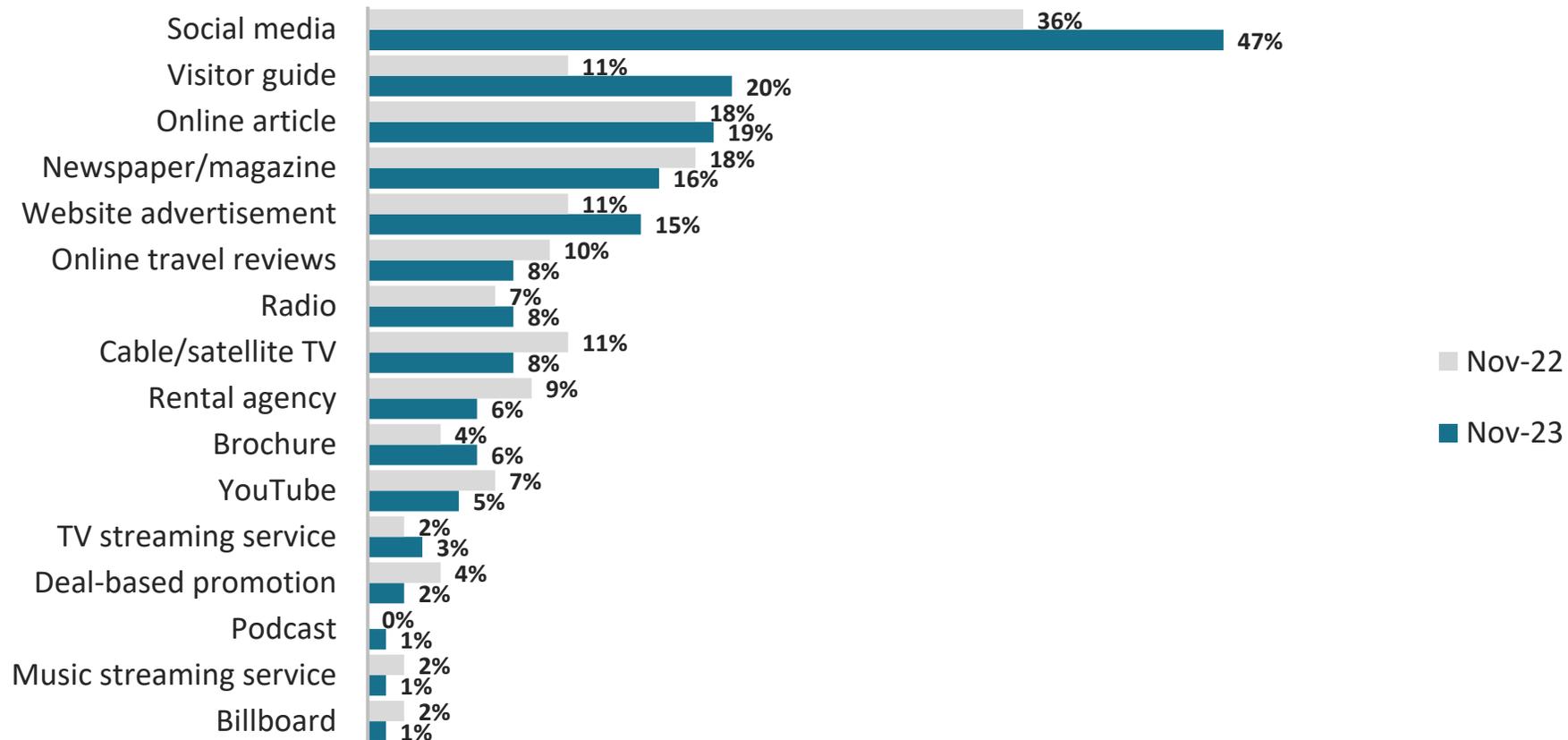




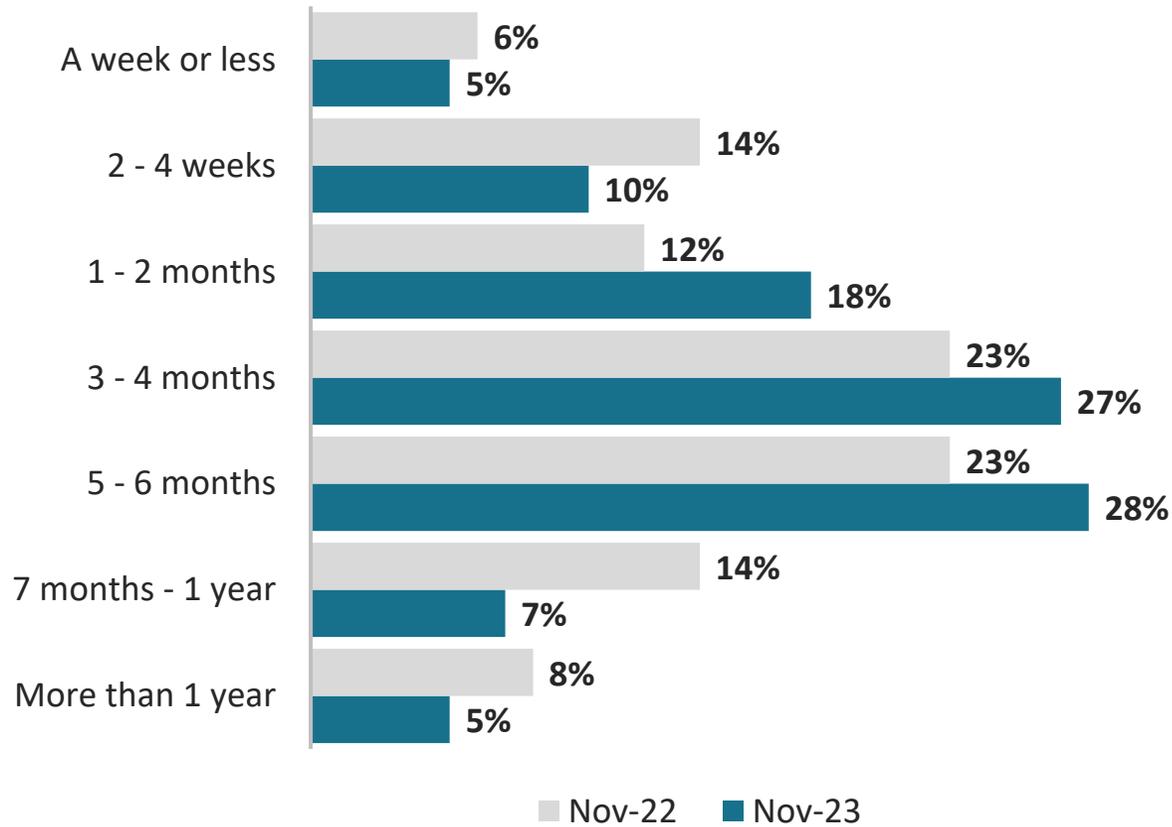
ADVERTISING RECALL¹



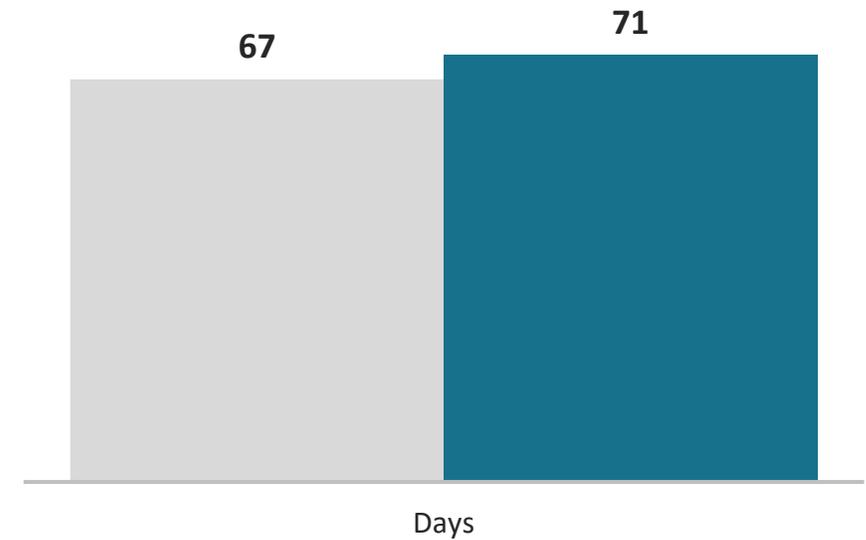
Base: % who recalled ads prior to their trip



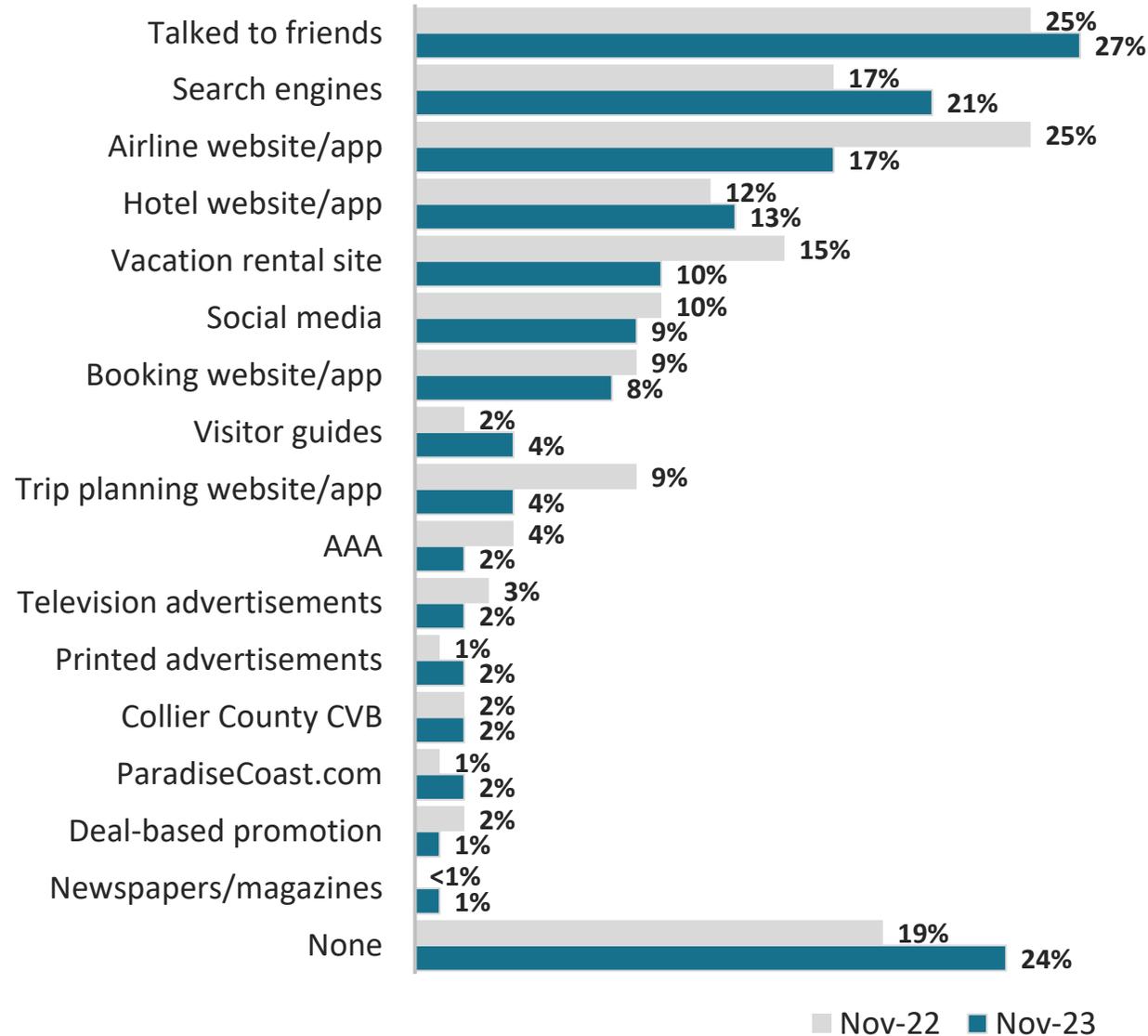
TRIP PLANNING CYCLE¹



Median Trip Planning Time

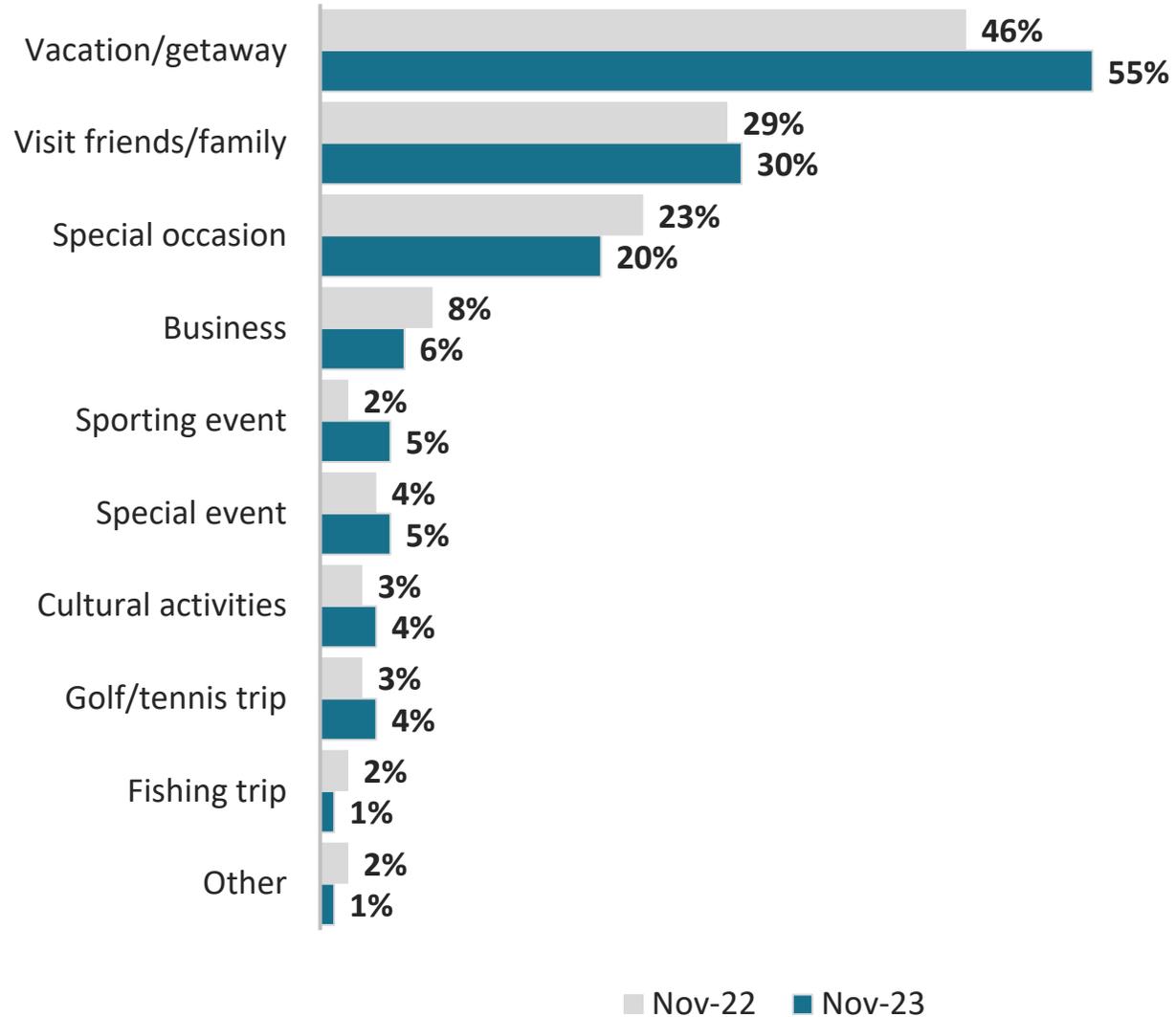


TRIP PLANNING SOURCES¹



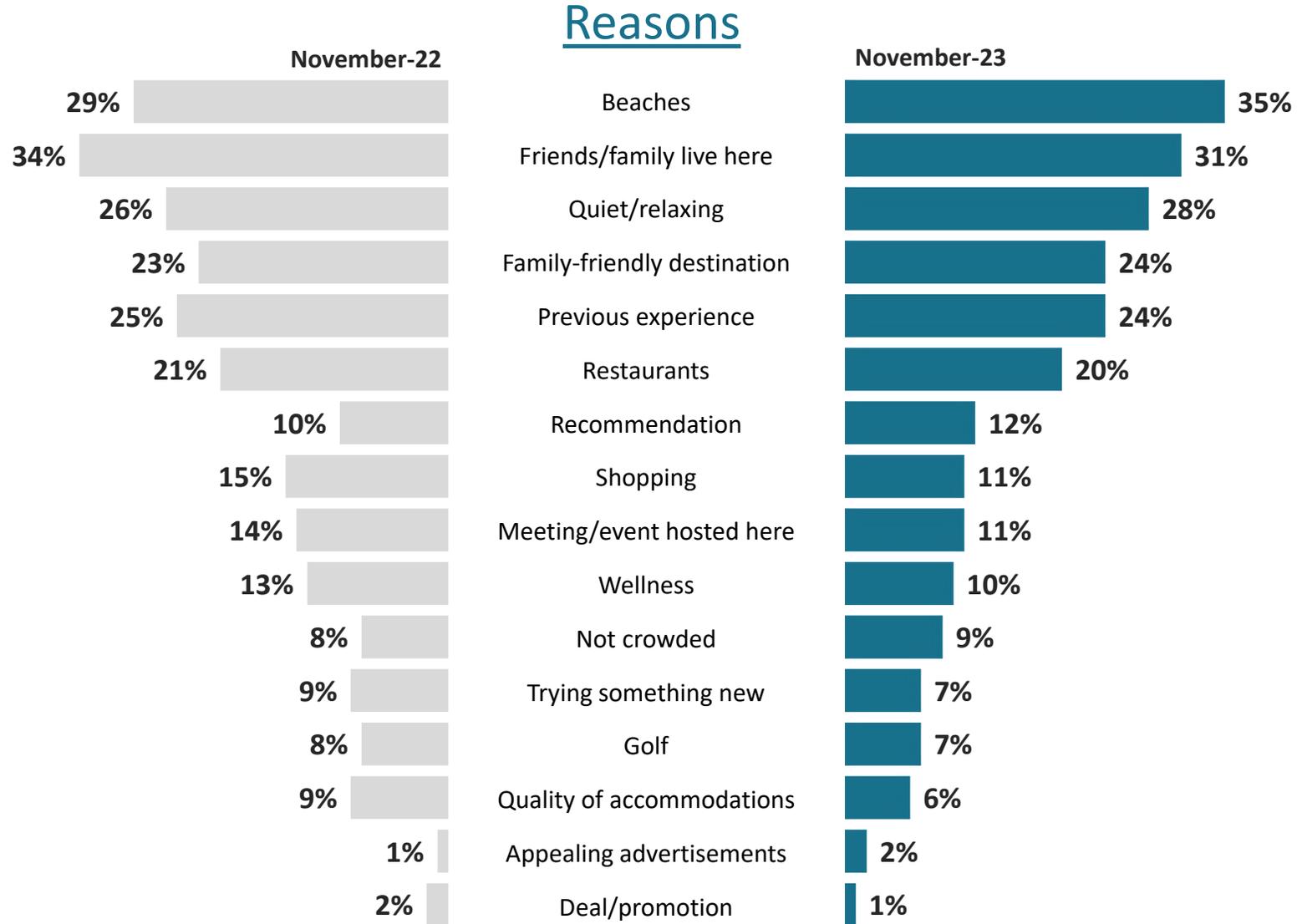
¹ Multiple responses permitted.

REASONS FOR VISITING¹



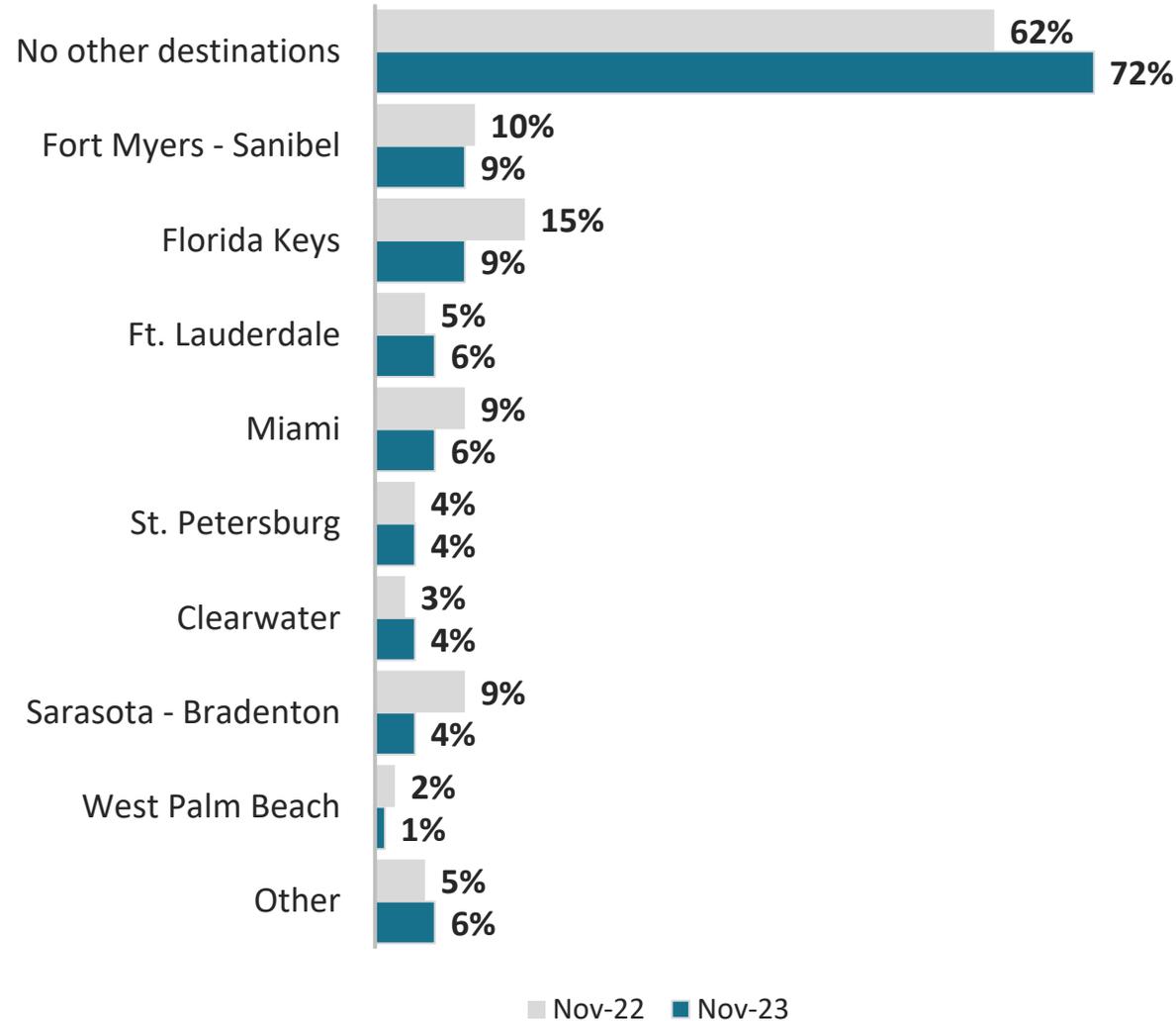
¹ Multiple responses permitted.

REASONS FOR CHOOSING AREA¹



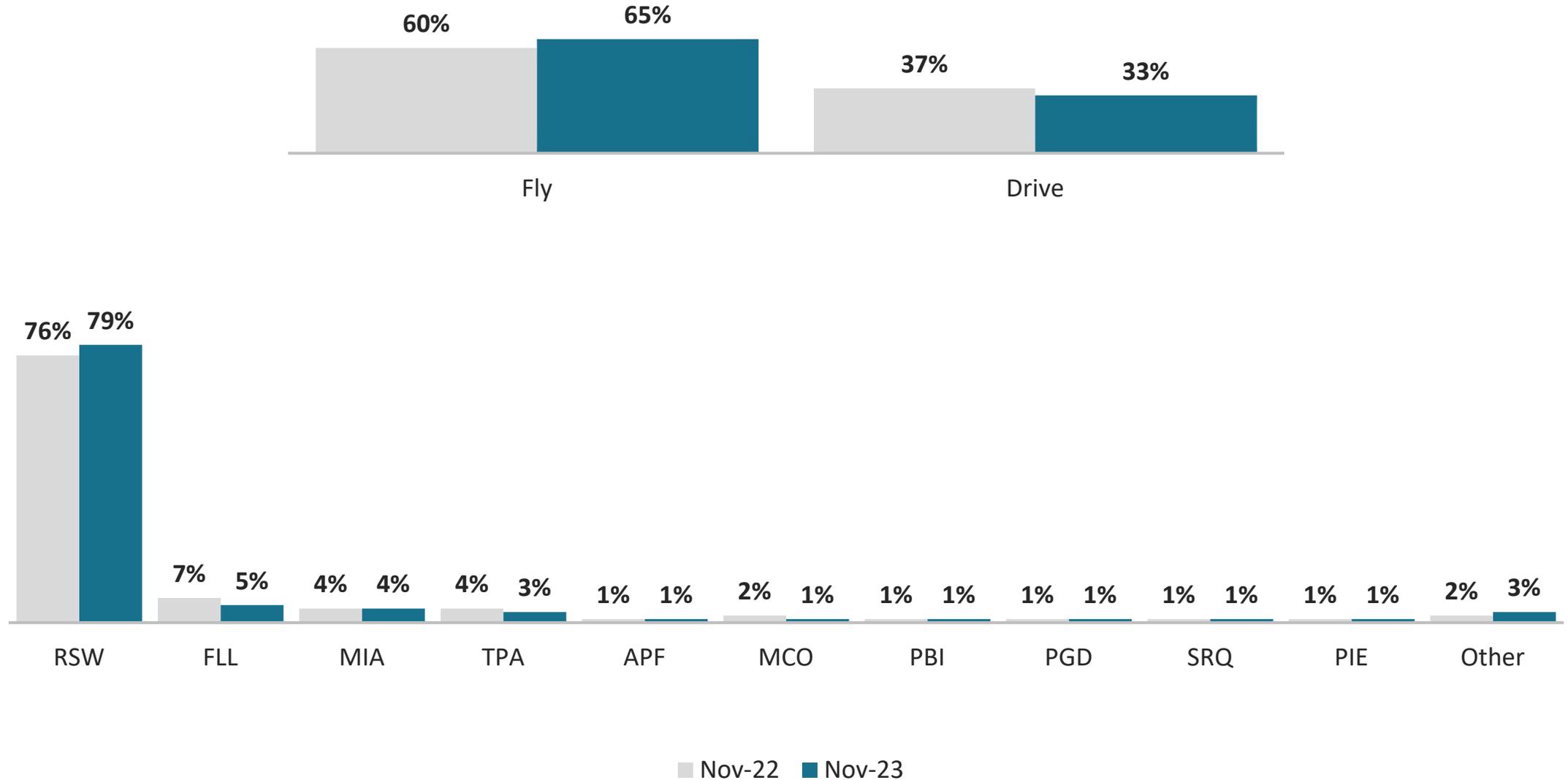
¹ Multiple responses permitted.

OTHER DESTINATIONS CONSIDERED¹



¹ Multiple responses permitted.

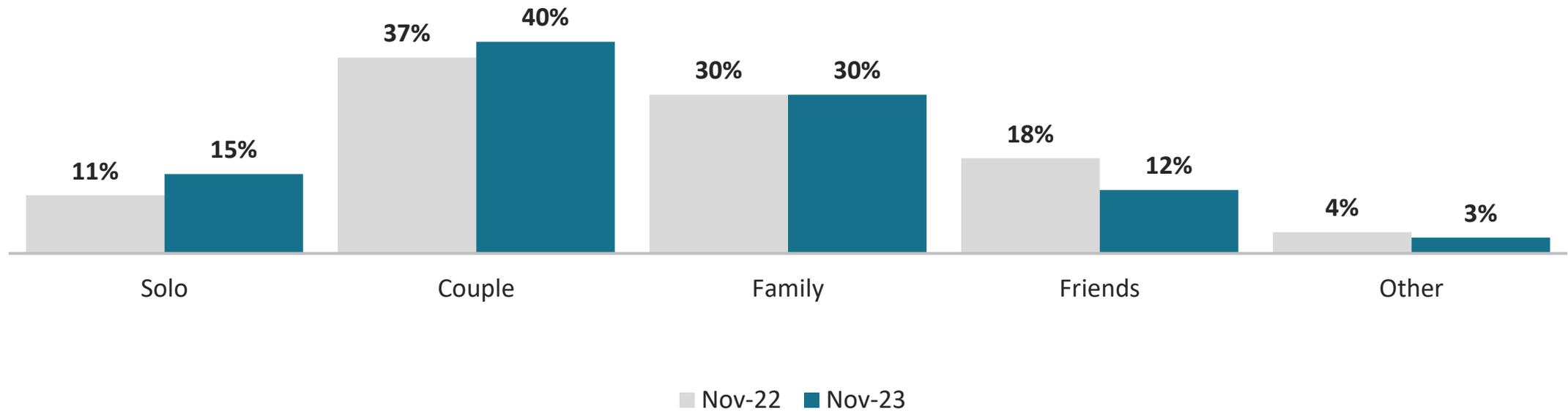
TRANSPORTATION METHODS



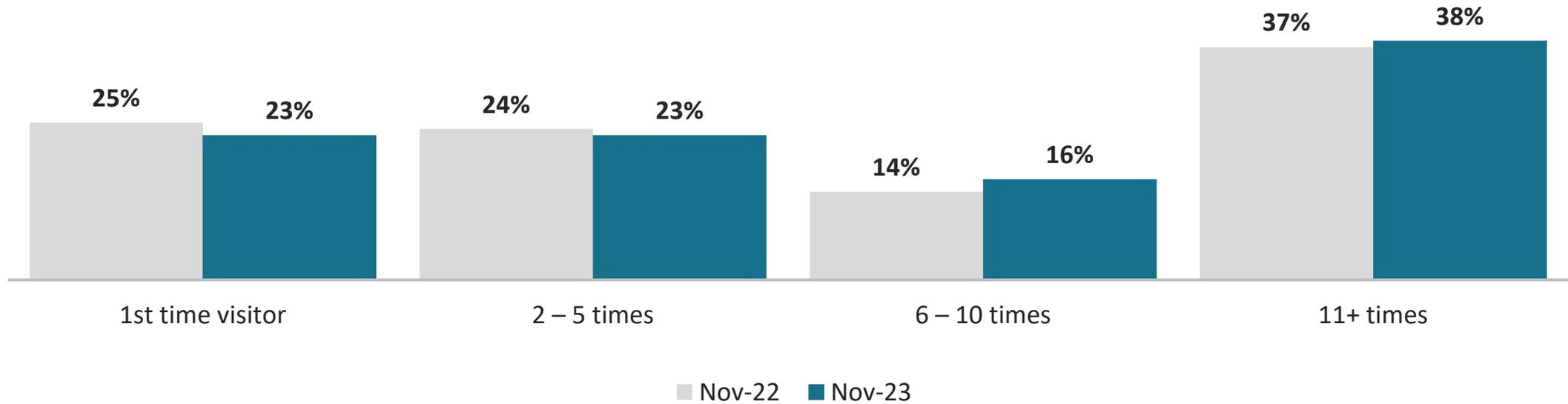
VISITOR JOURNEY: TRAVEL PARTY PROFILE



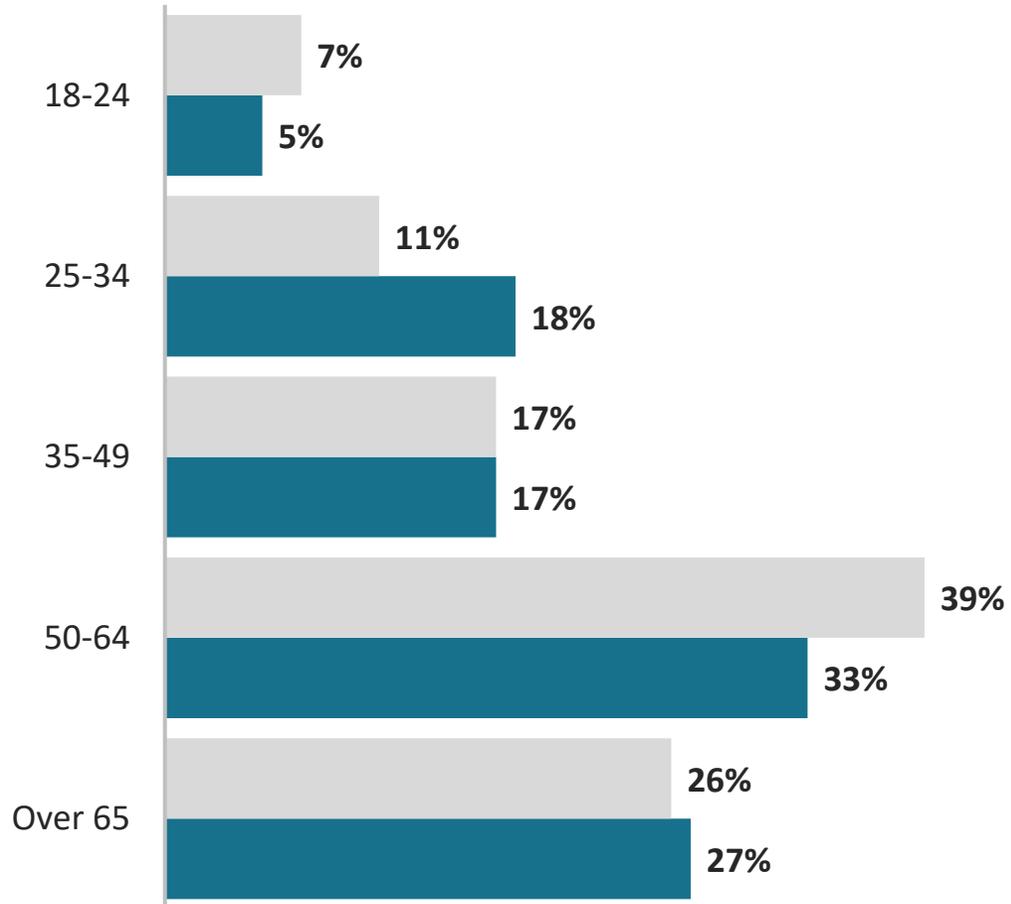
TRAVEL PARTY COMPOSITION



PREVIOUS VISITS

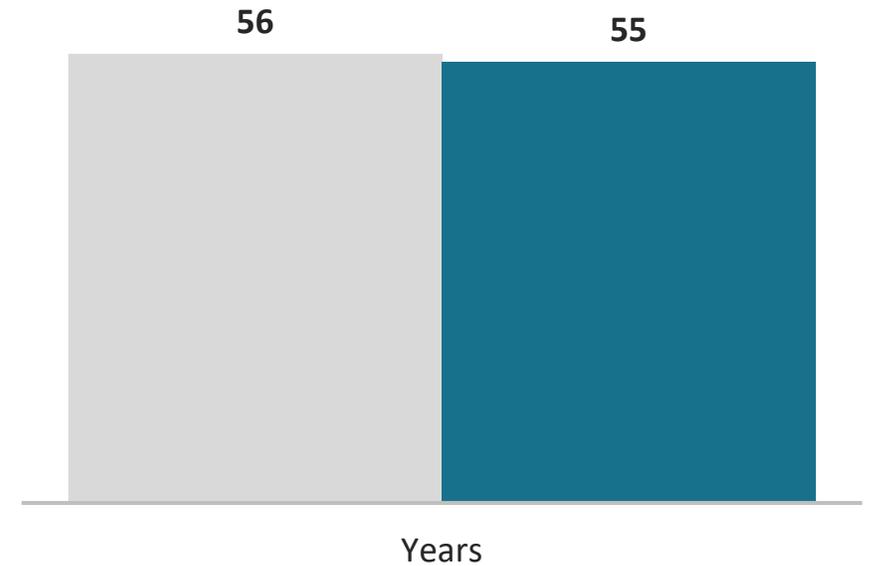


Age



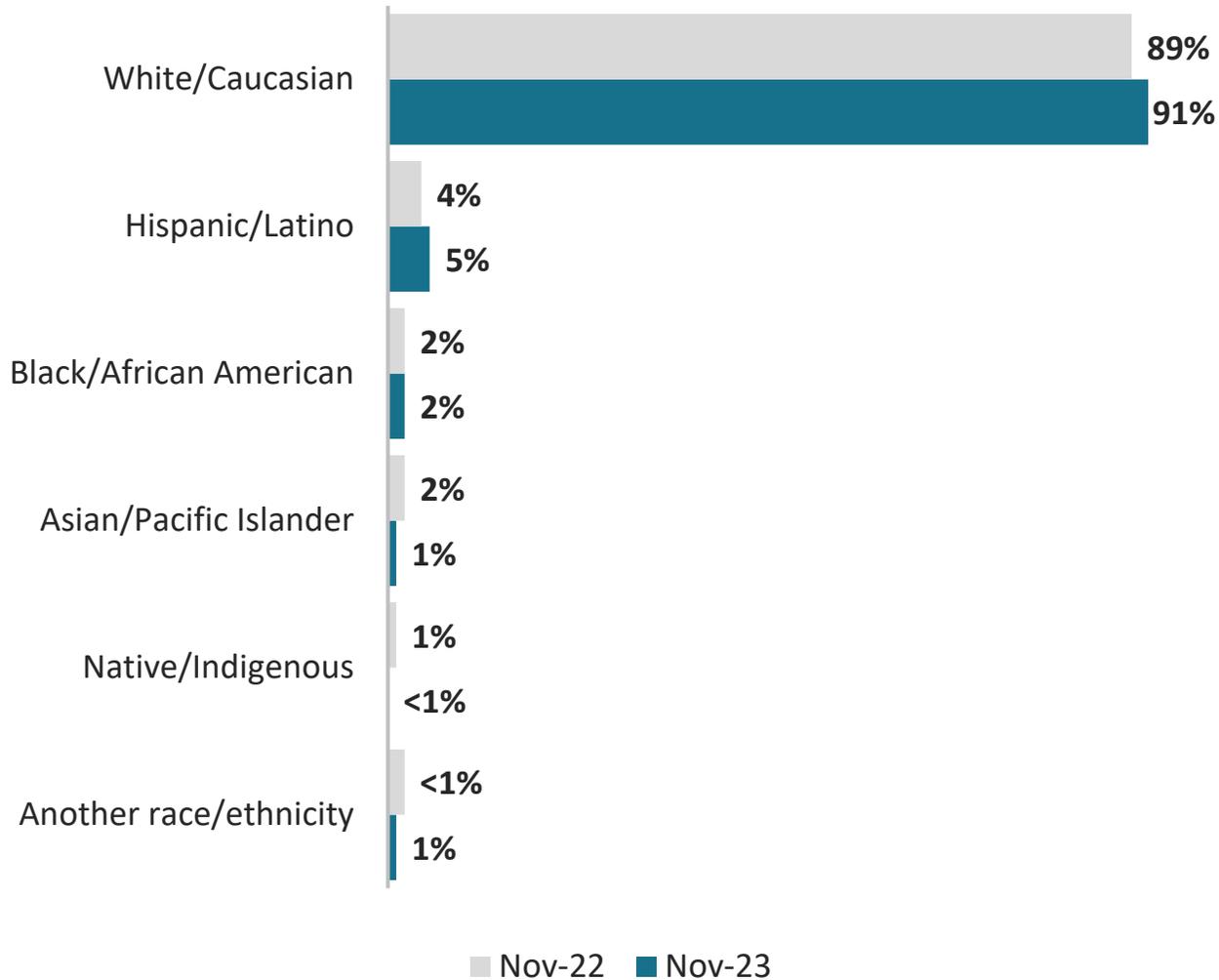
■ Nov-22 ■ Nov-23

Median Age

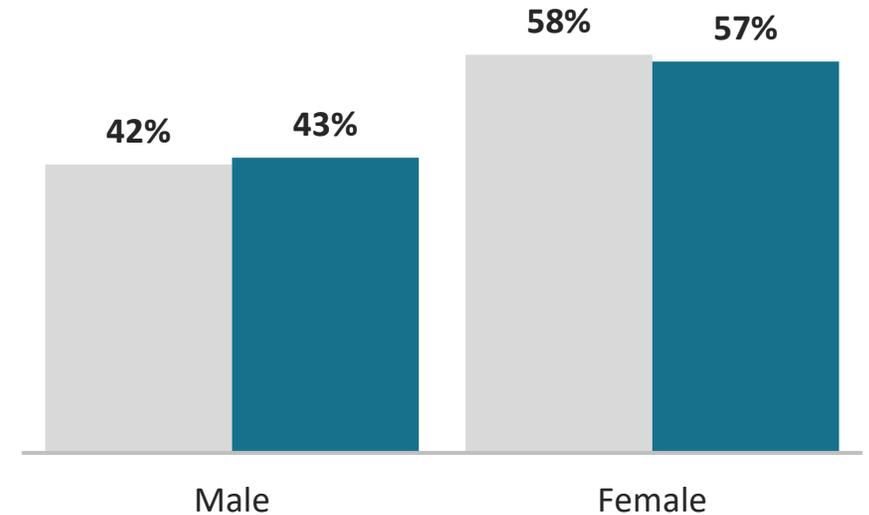


VISITOR RACE & GENDER¹

Race

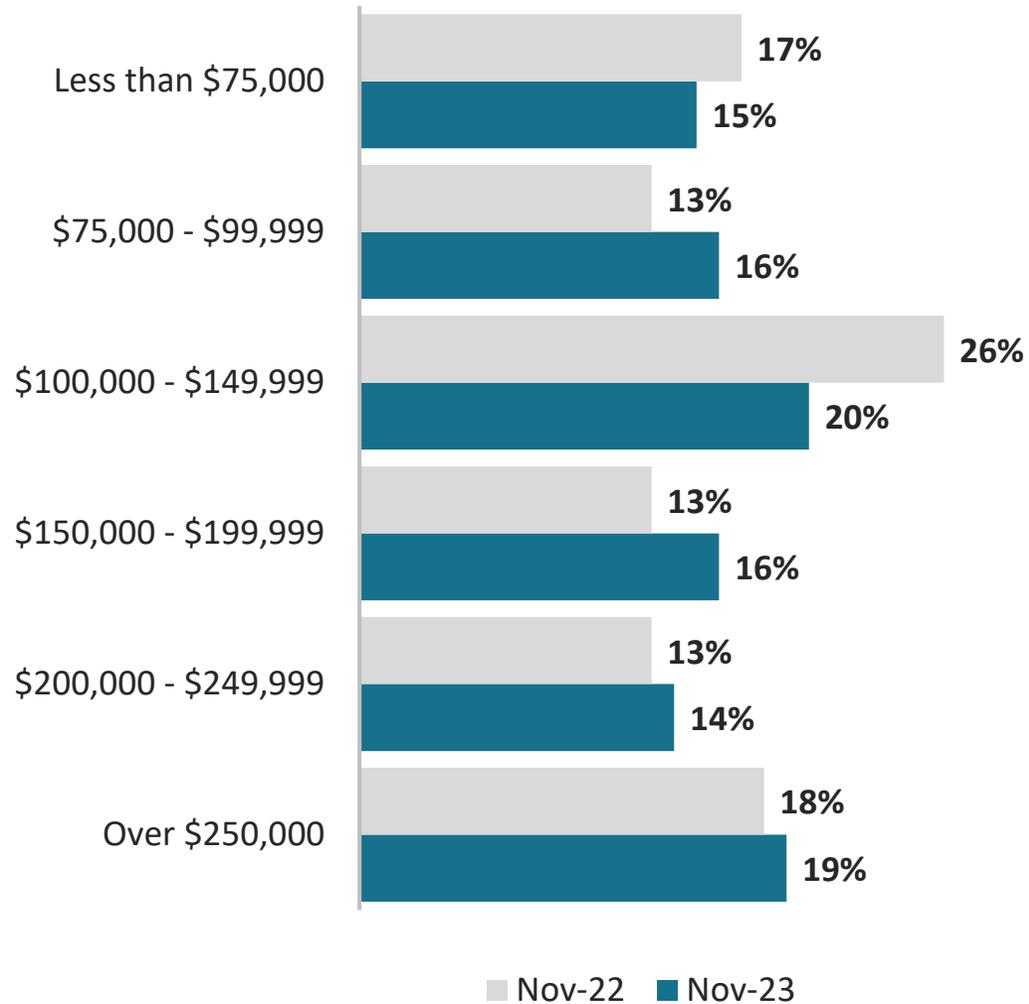


Gender

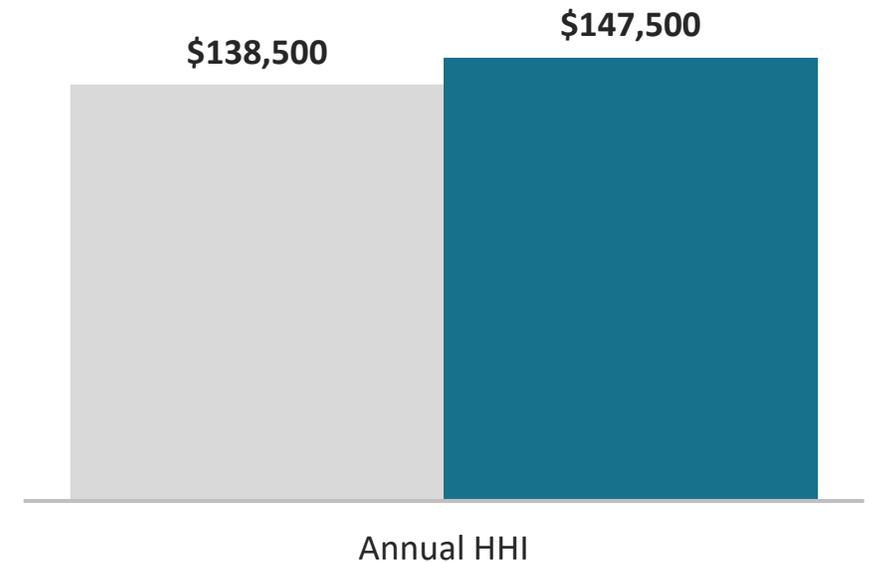


¹Of person interviewed. Females are generally more likely to agree to participate in survey research.

Income



Median Household Income



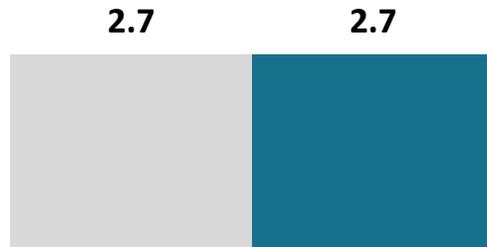
VISITOR JOURNEY: TRIP EXPERIENCE



TRIP CHARACTERISTICS

TRAVEL PARTY SIZE

2.7



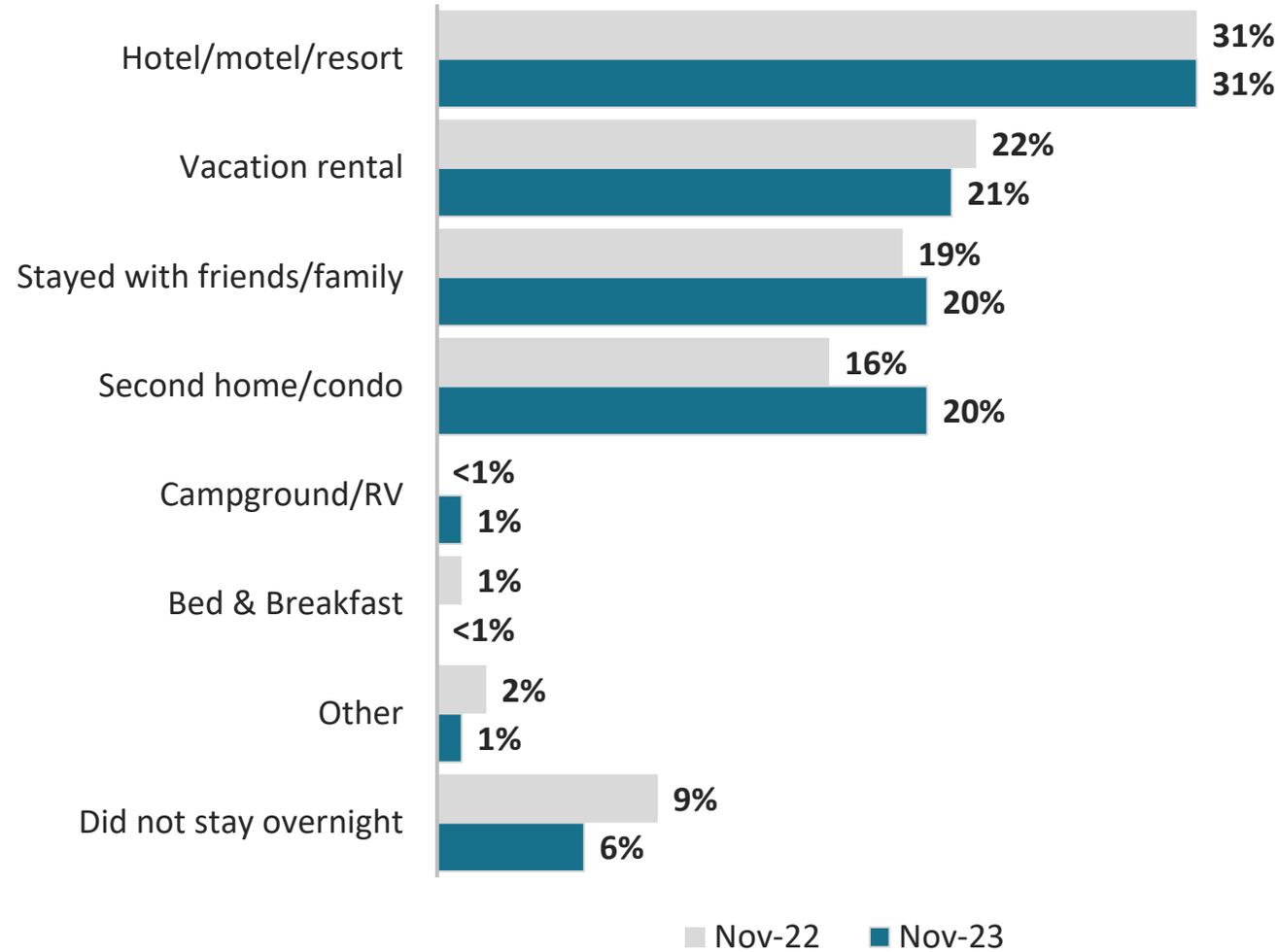
NIGHTS STAYED

7.0

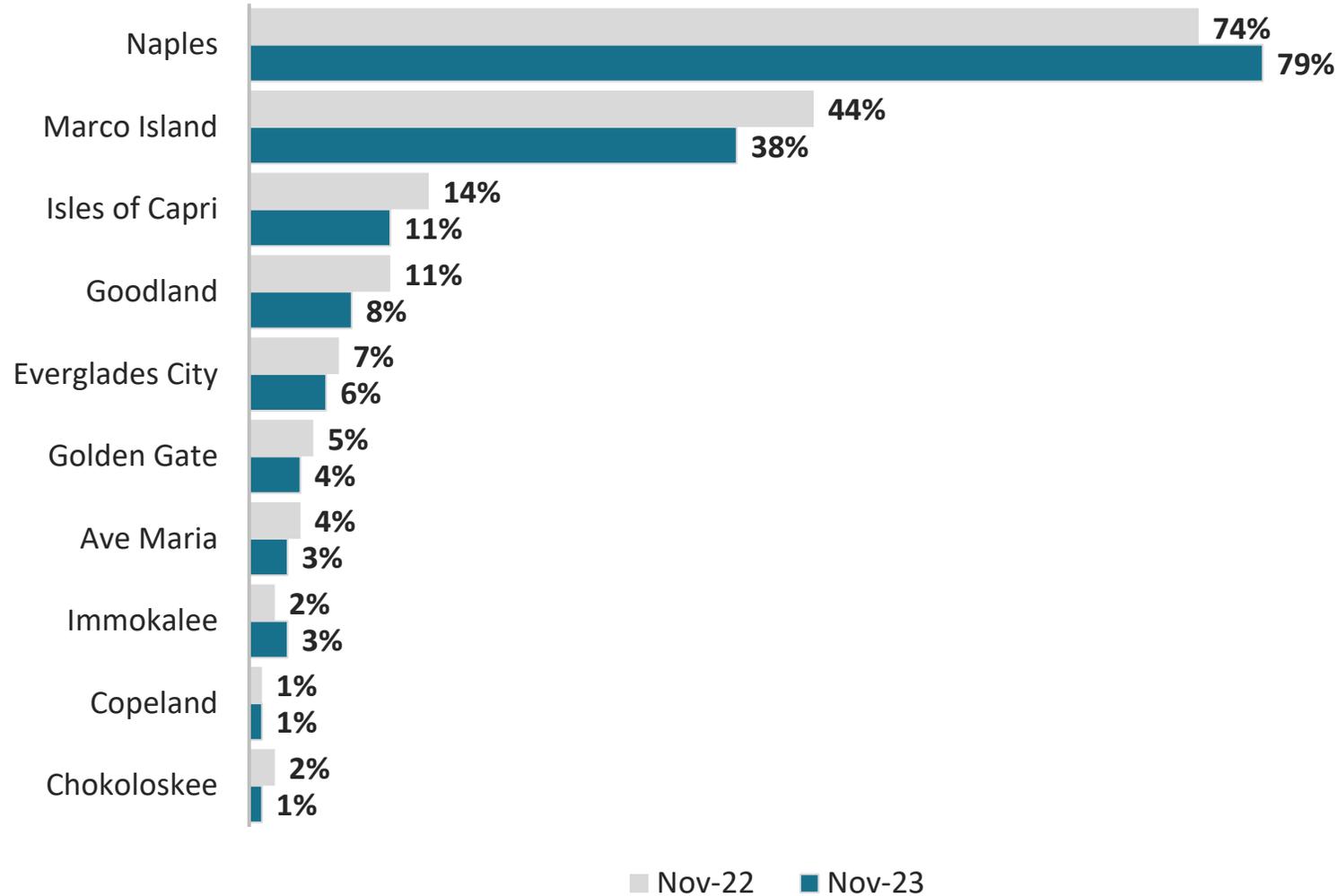


■ Nov-22 ■ Nov-23

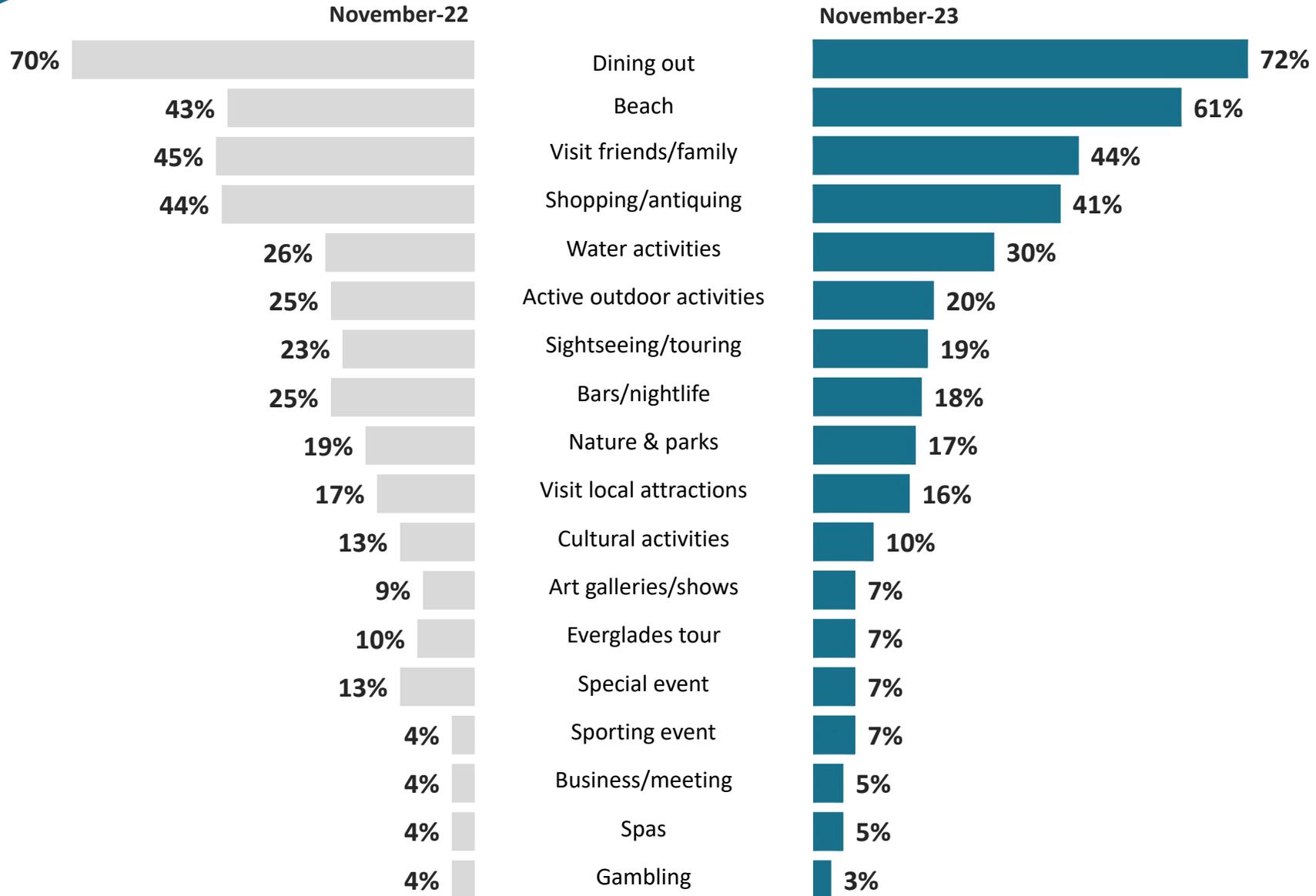
TYPE OF ACCOMMODATIONS



AREAS VISITED

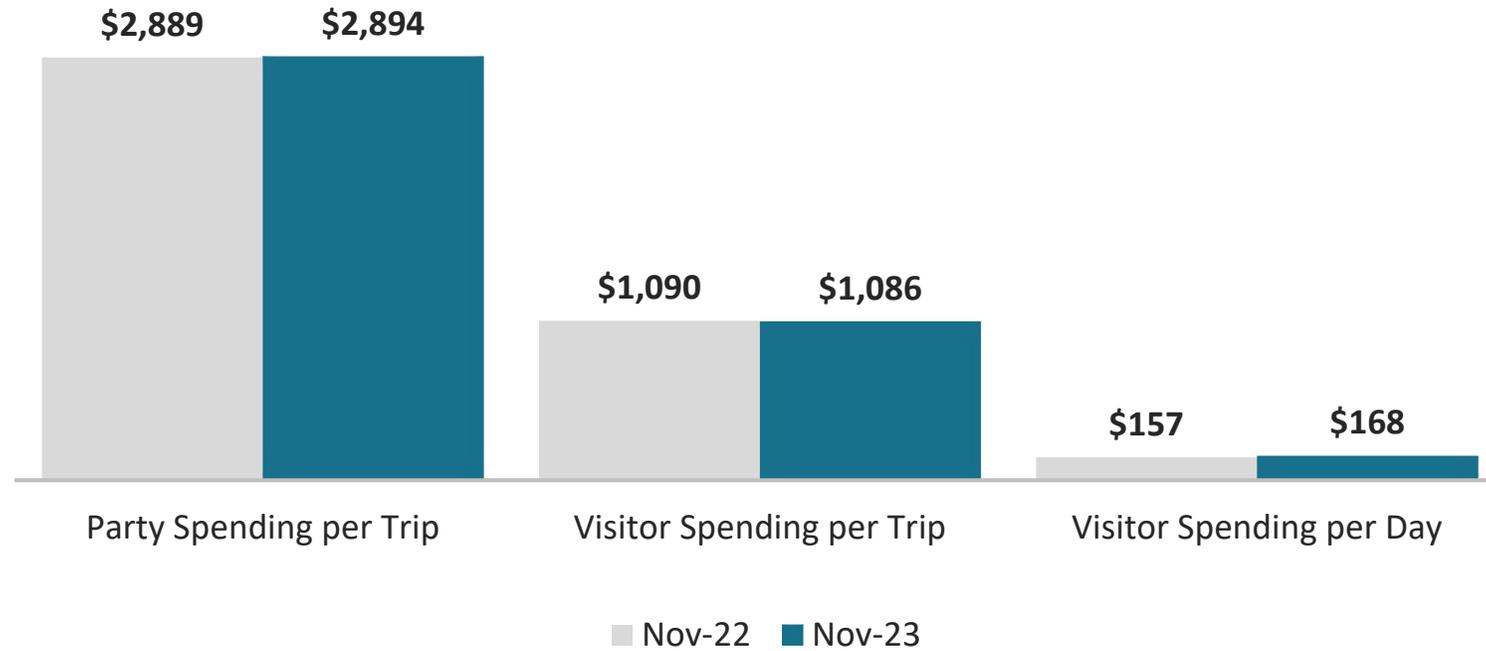


TRIP ACTIVITIES



¹ Multiple responses permitted.

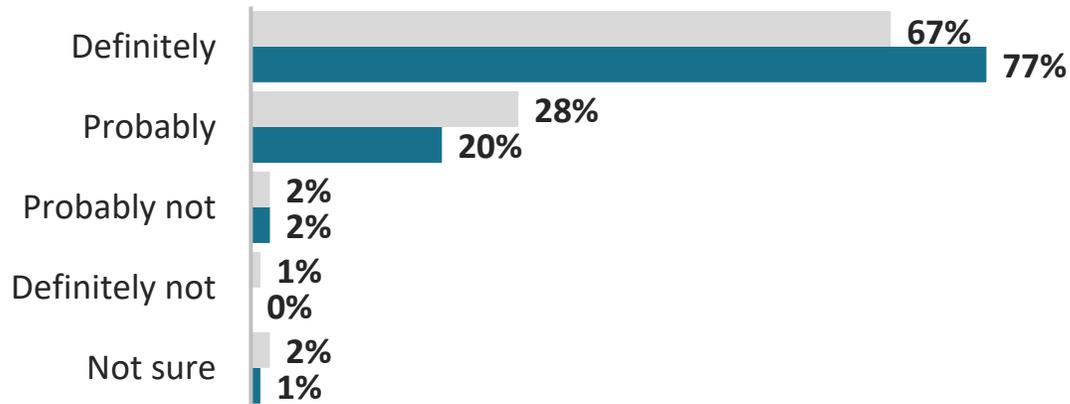
VISITOR SPENDING



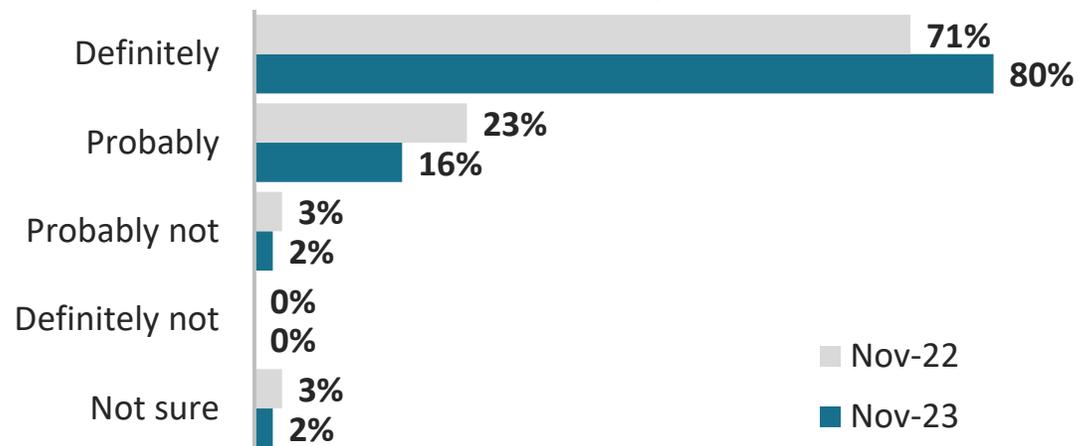
VISITOR JOURNEY: POST-TRIP EVALUATION



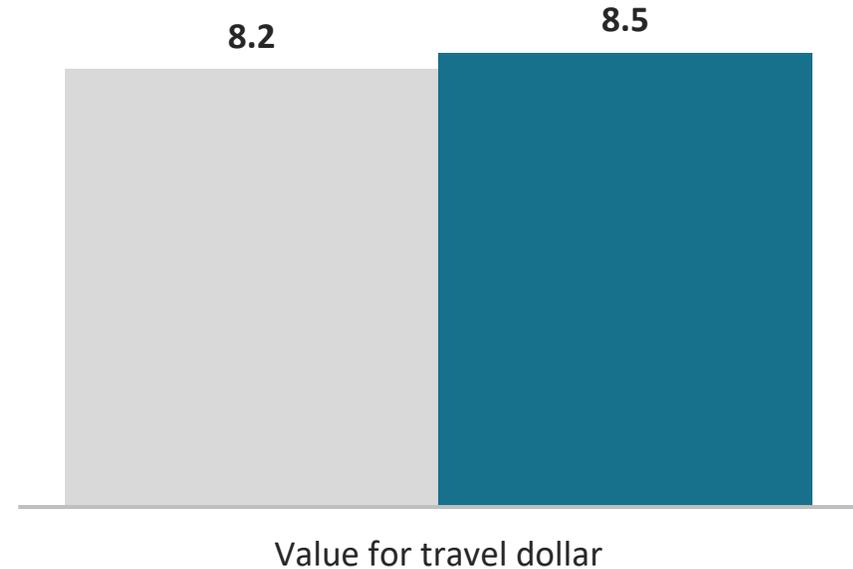
Will recommend the Naples area?



Will return to the Naples area?



VALUE FOR TRAVEL DOLLAR^{1,2}



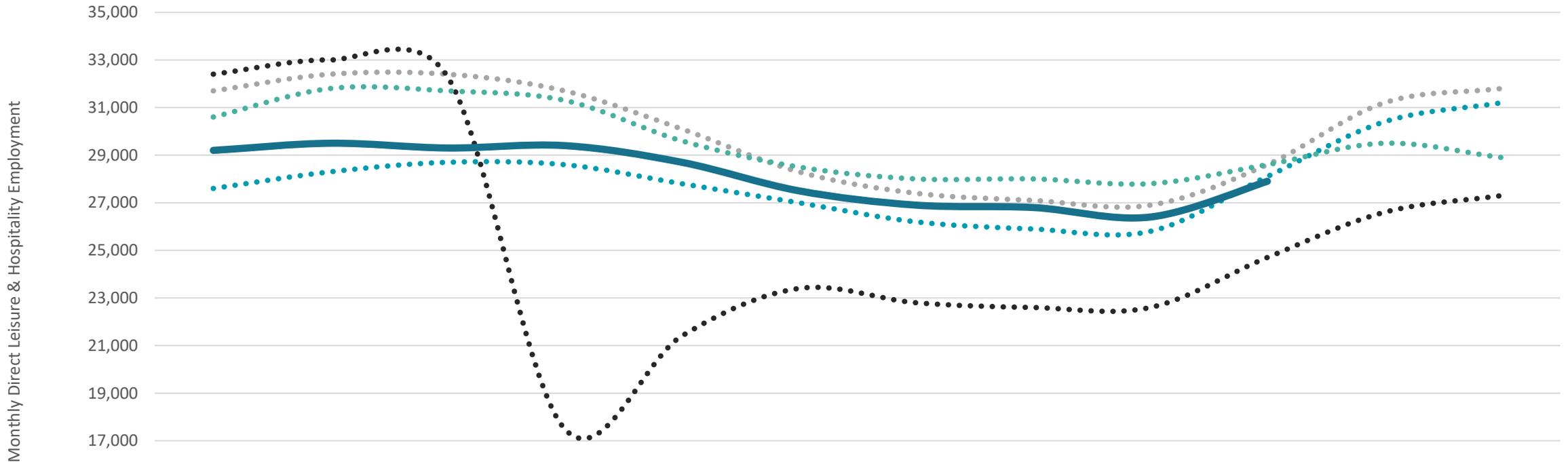
¹ 10-point scale where 10 is "excellent" and 1 is "poor".
² All visitors who gave a rating of 6 or below cited high prices as their primary reason for giving lower ratings.

INDUSTRY DATA



LEISURE & HOSPITALITY EMPLOYMENT

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



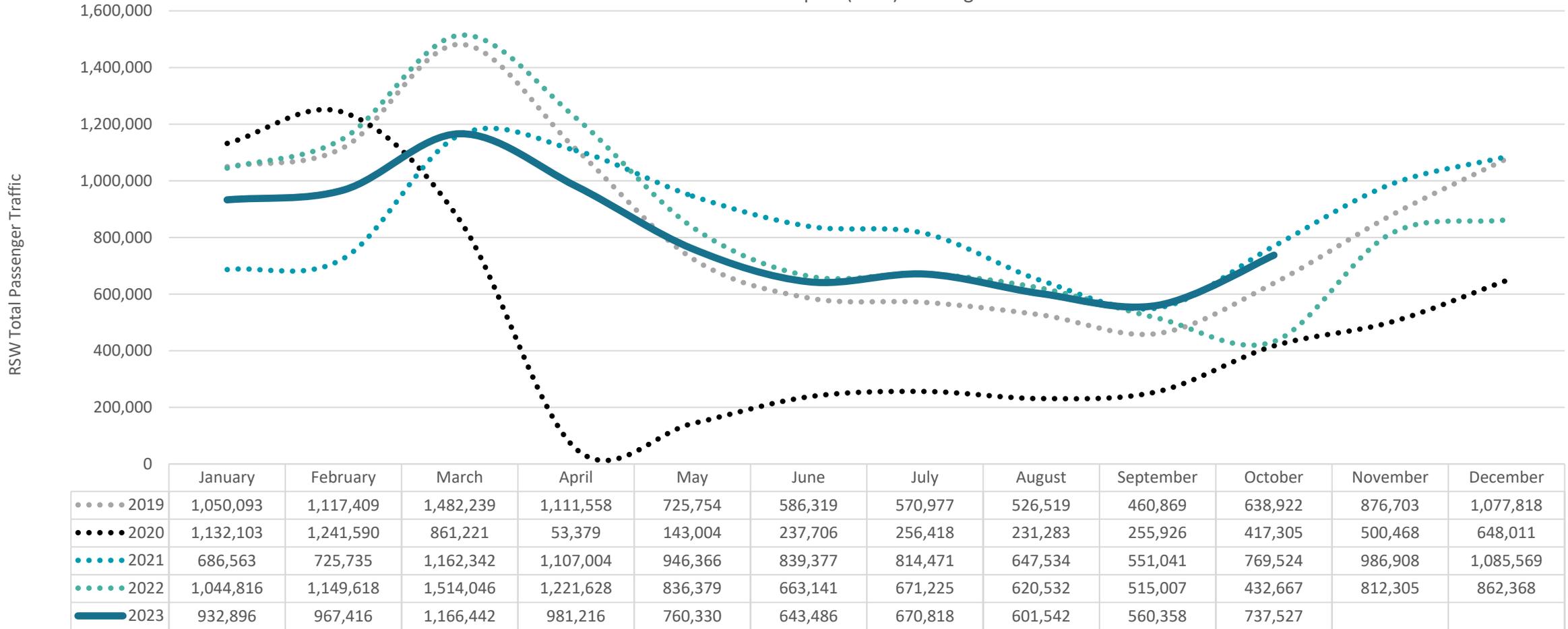
Monthly Direct Leisure & Hospitality Employment

	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	27,900 (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



¹SOURCE: Lee County Port Authority Monthly Statistics.

LICENSED TRANSIENT RENTAL UNITS

November 2023 Licensed Transient Rental Units ¹				
	Hotel	Motel	Vacation Rental	Total
Naples	4,602	1,368	2,988	8,958
Marco Island	1,275	121	2,038	3,434
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	5	5
Ochopee	0	0	1	1
Total	5,915	1,763	5,166	12,844²

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
November 2023 Monthly Dashboard

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