

# NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau  
September 2023 Monthly Dashboard





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.



Occupancy was up 2.7% from September 2022, while visitation was up 9.6%. Average length of stay and travel party size were up 10.1% and 8.1% respectively as well, causing visitor days to be up 20.6%.



Direct Spending by visitors in September increased 5.1% from 2022, while the Total Economic Impact of Tourism was down 2.1% from September 2022.



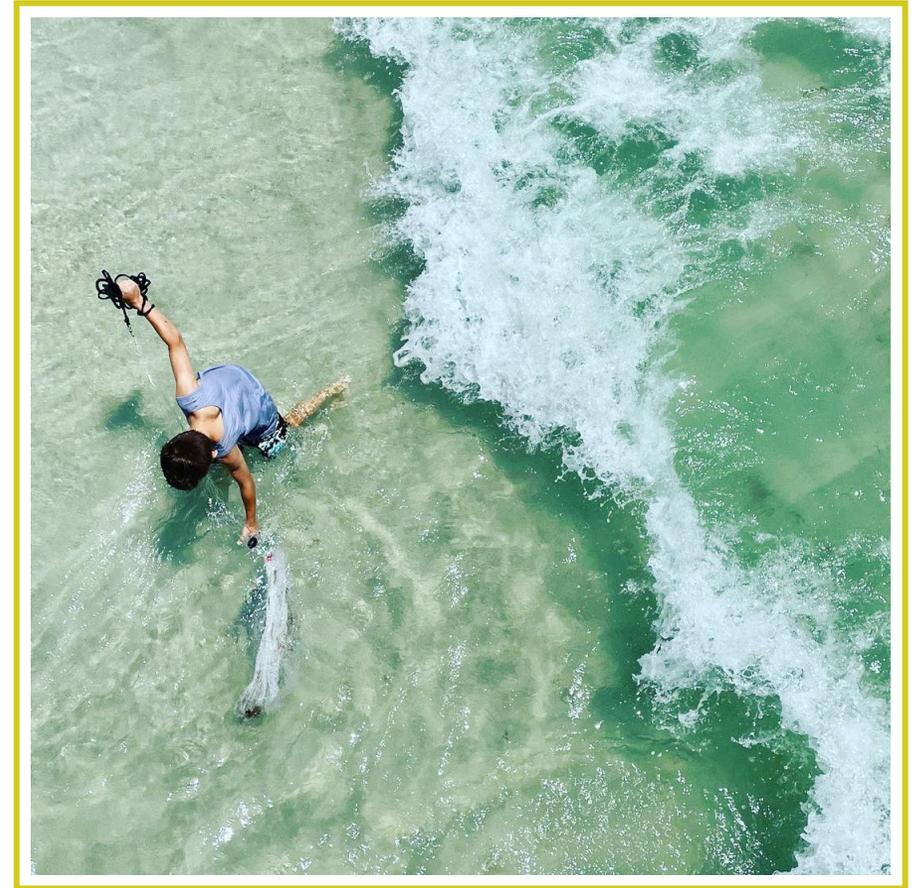
Restaurant spending by visitors was up 32.1% from September 2022. The increase was likely due to the expanded 2023 edition of the Sizzle Dining event which ran from September 7<sup>th</sup> to September 27<sup>th</sup>.

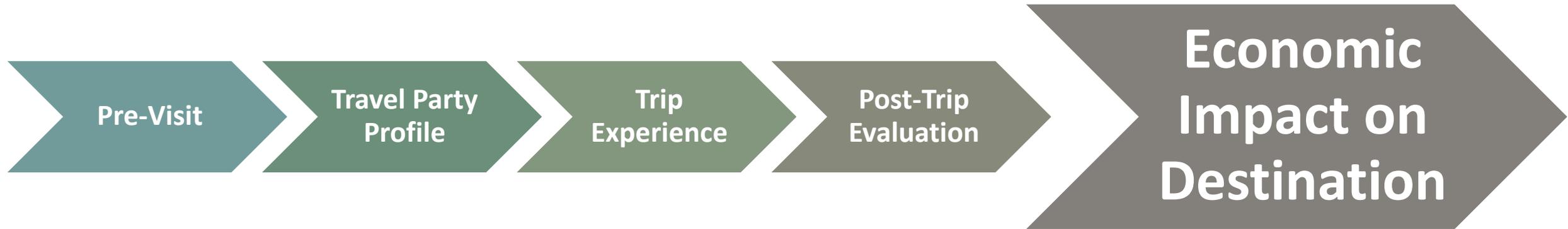


Advertising recall among visitors in September rose from 15% in 2022 to 25% in 2023. Although the share of visitors who reported being directly influenced to visit by advertising only rose very slightly, the share of first-time visitors rose significantly, from 26% to 33%.



The share of visitors who said they considered visiting other destinations prior to their trip remained elevated (up 11%), with the Fort Myers area and the Florida Keys still being the other destinations most often considered.

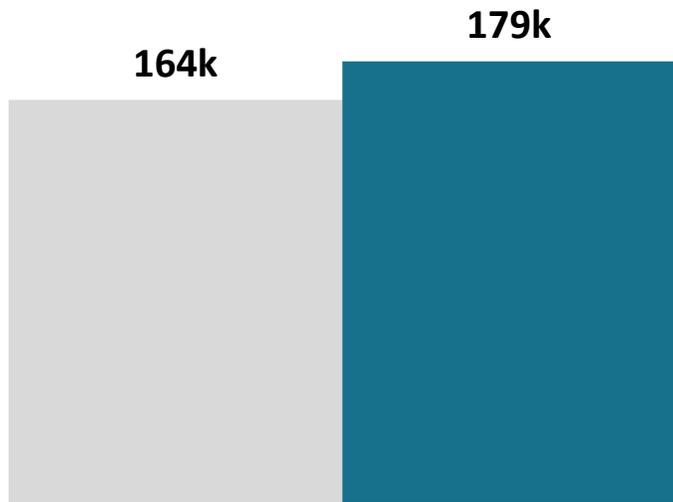




# SEPTEMBER 2023 VISITATION & ROOM NIGHTS

## VISITORS

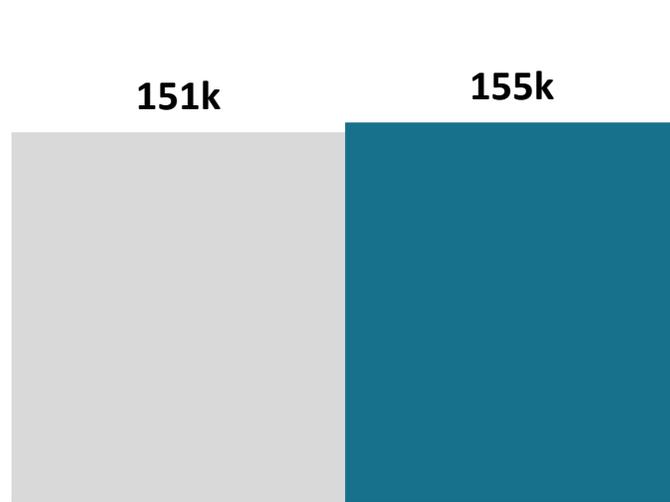
179,400



+ 9.6% from 2022

## ROOM NIGHTS

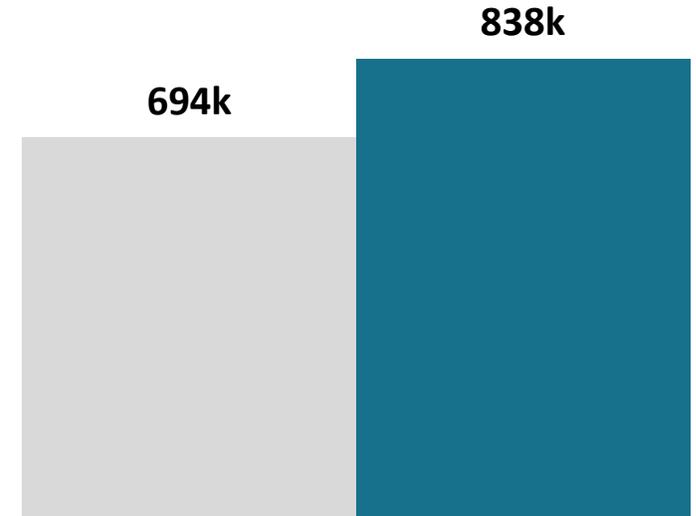
154,600



+ 2.7% from 2022

## VISITOR DAYS

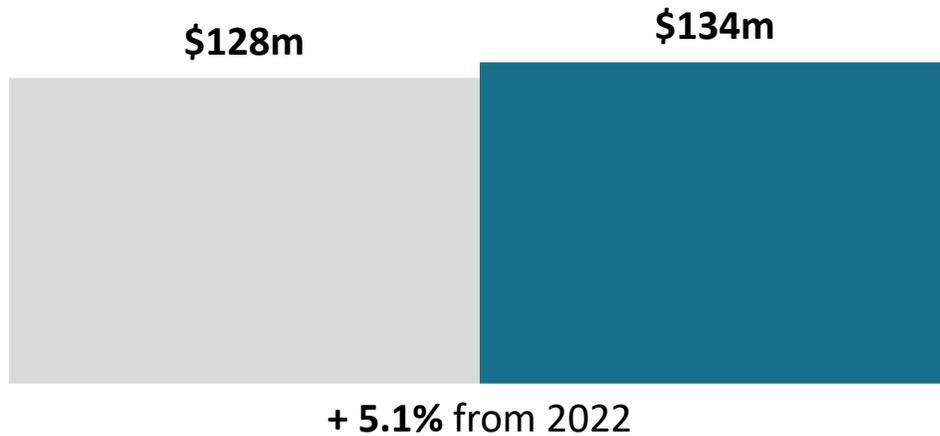
837,800



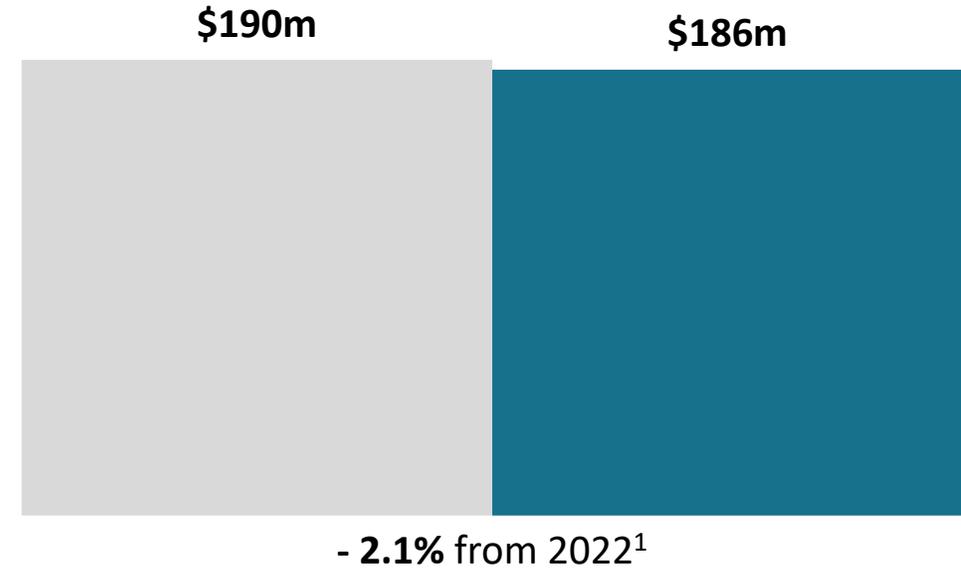
+ 20.6% from 2022

■ Sep-22 ■ Sep-23

DIRECT SPENDING  
**\$134,049,700**



ECONOMIC IMPACT  
**\$186,061,000**



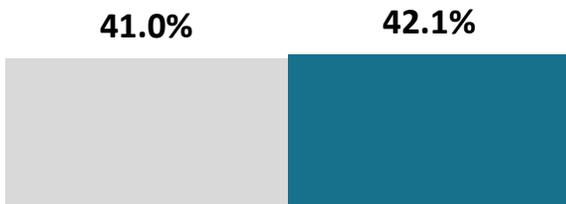
■ Sep-22   ■ Sep-23

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

# SEPTEMBER 2023 OVERALL LODGING METRICS<sup>1,2</sup>

## OCCUPANCY RATE

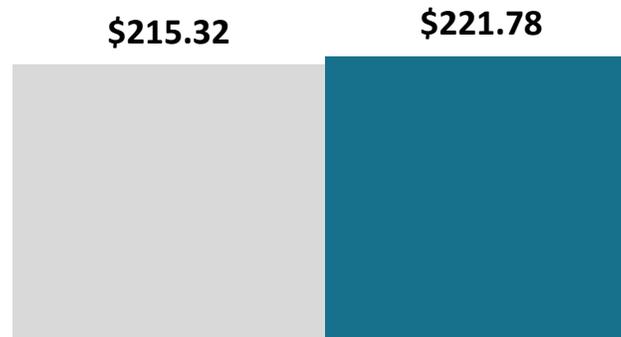
42.1%



+ 2.7% from 2022

## AVERAGE DAILY RATE

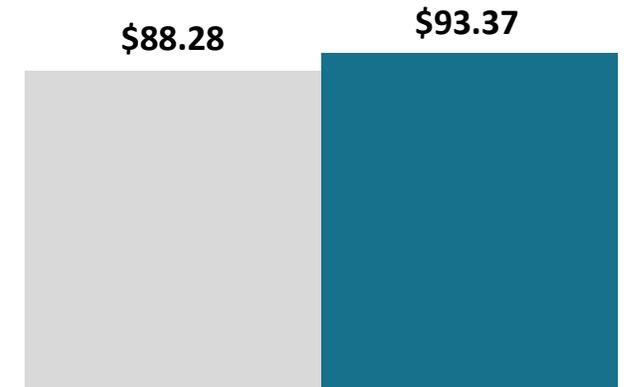
\$221.78



+ 3.0% from 2022

## REVENUE PER AVAILABLE ROOM

\$93.37



+ 5.8% from 2022

■ Sep-22   ■ Sep-23

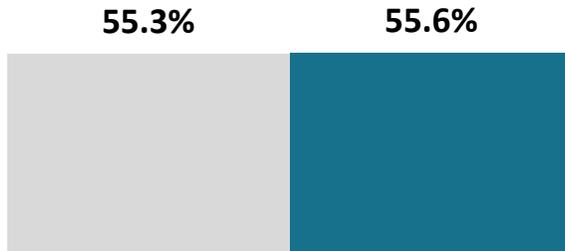
<sup>1</sup> Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

<sup>2</sup> Occupancy, ADR, and RevPAR figures for September 2022 have been adjusted to reflect updated calculation methods.

# SEPTEMBER 2023 HOTEL LODGING METRICS<sup>1</sup>

## OCCUPANCY RATE

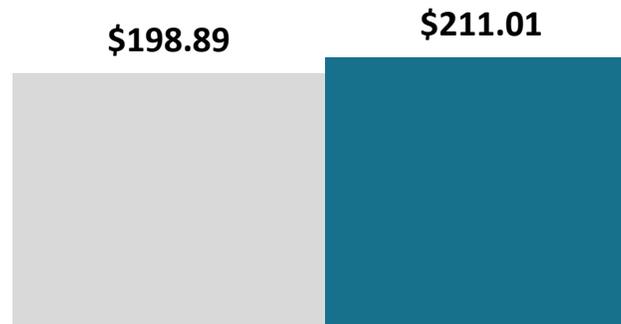
55.6%



+ 0.6% from 2022

## AVERAGE DAILY RATE

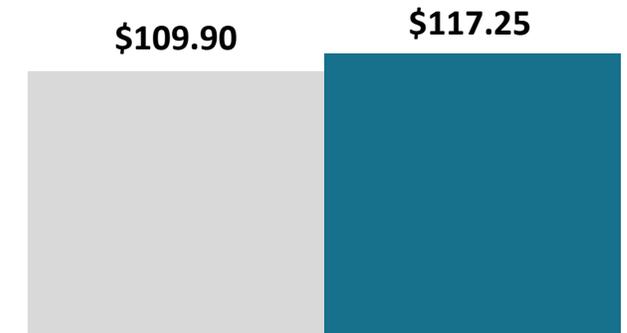
\$211.01



+ 6.1% from 2022

## REVENUE PER AVAILABLE ROOM

\$117.25

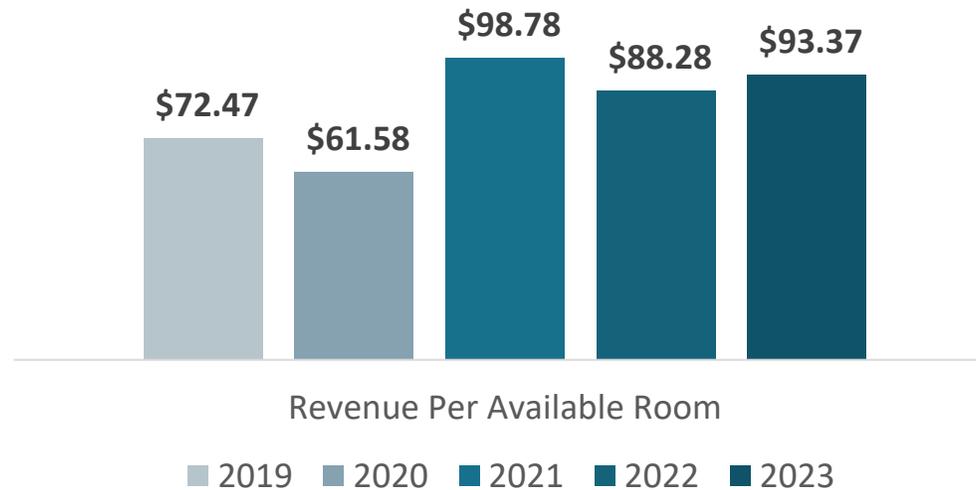
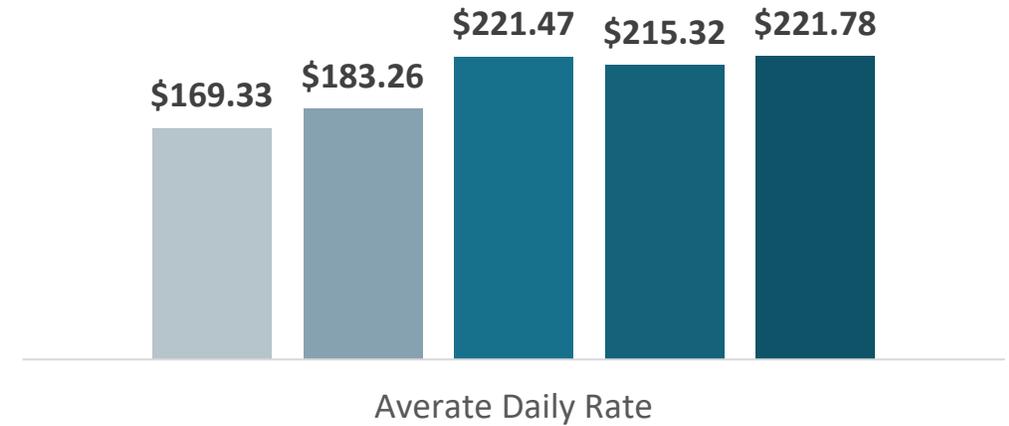
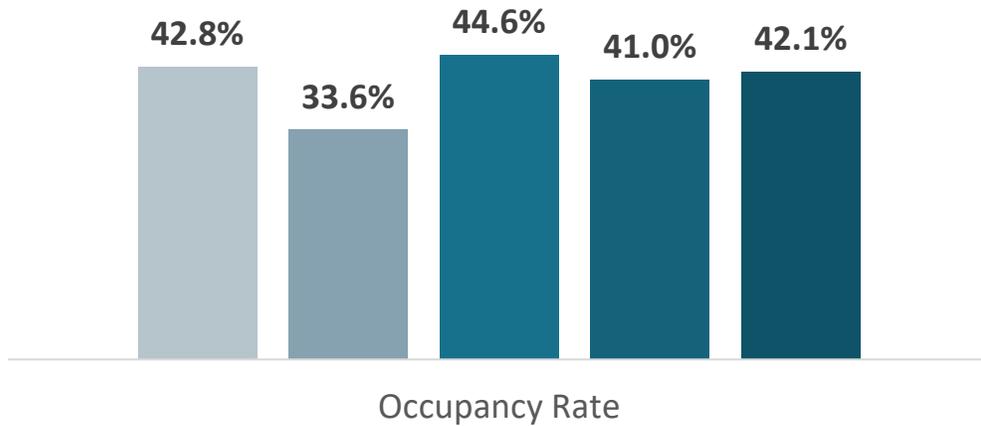


+ 6.7% from 2022

■ Sep-22   ■ Sep-23

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

# SEPTEMBER 2019-2023 OVERALL LODGING METRICS<sup>1,2</sup>



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

<sup>2</sup> Occupancy, ADR, and RevPAR figures for September 2022 have been adjusted to reflect updated calculation methods.

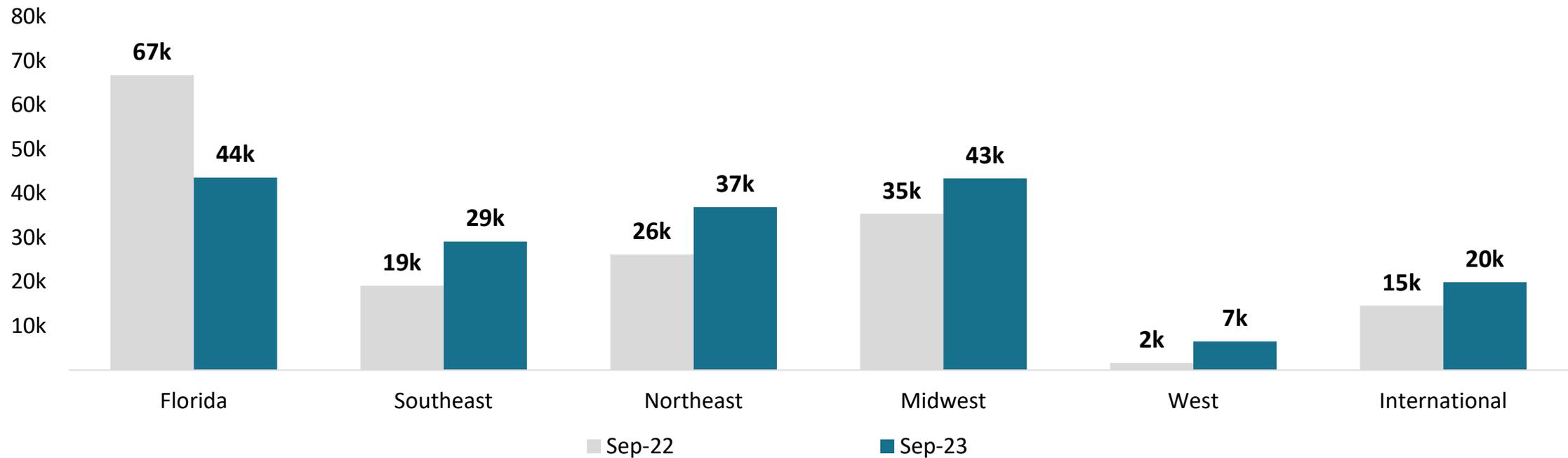
# VISITOR ORIGIN

FLORIDA VISITORS

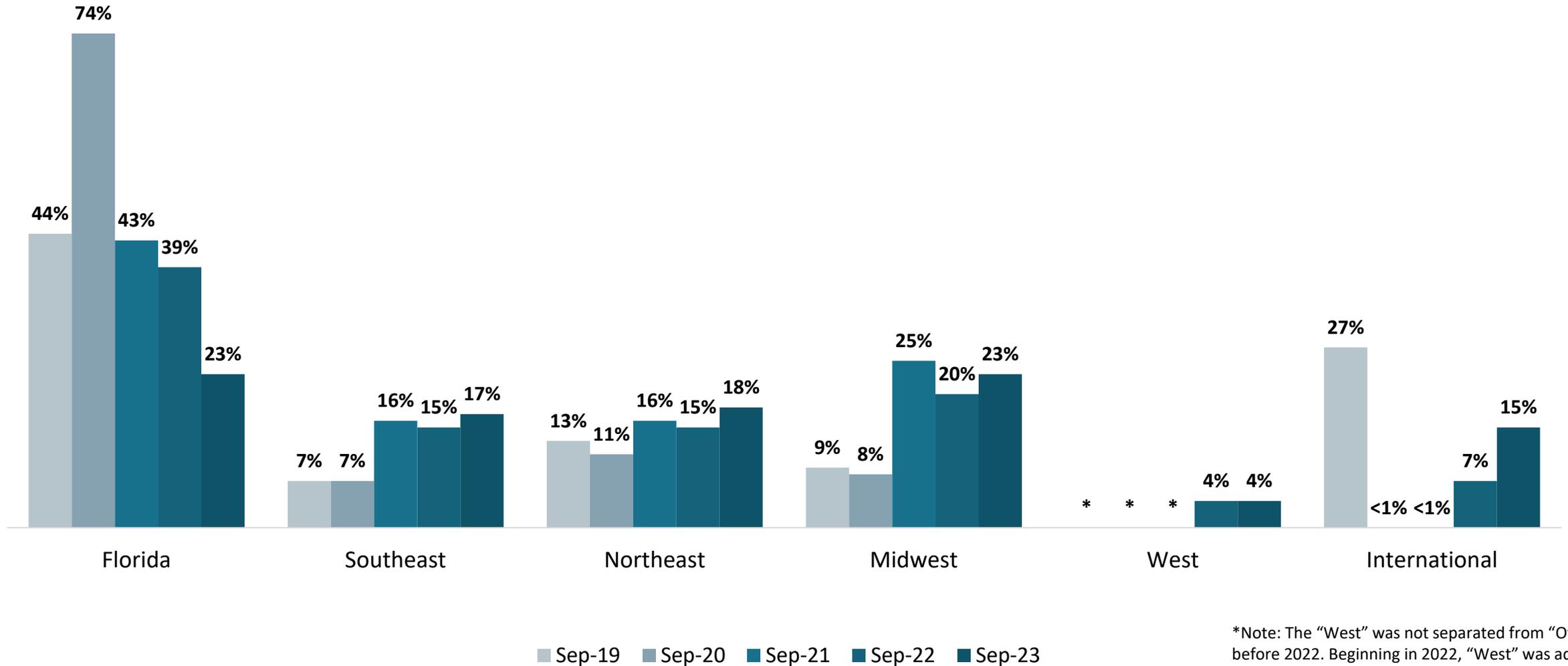
43,600

OUT-OF-STATE VISITORS

135,800

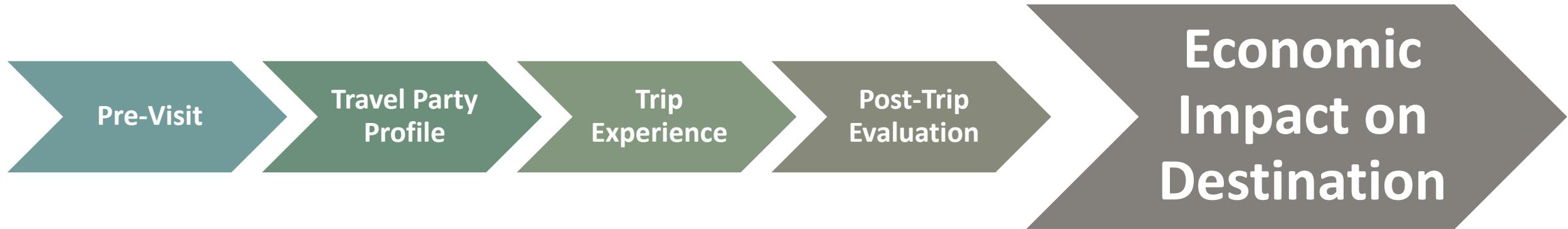


# SEPTEMBER 2019-2023 OVERNIGHT VISITOR ORIGIN



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

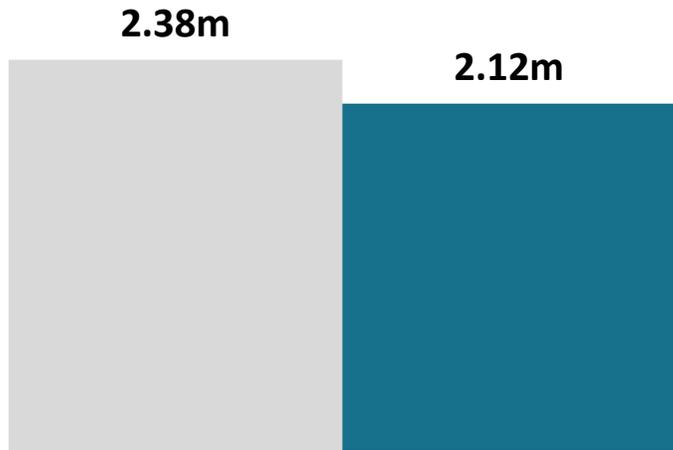
# TOURISM CALENDAR YEAR-TO-DATE (CYTD)



# CYTD VISITATION METRICS

## CYTD VISITORS

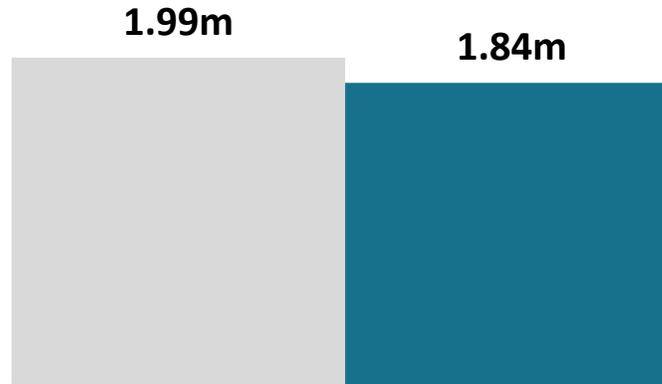
2,116,800



- 11.2% from 2022

## CYTD ROOM NIGHTS

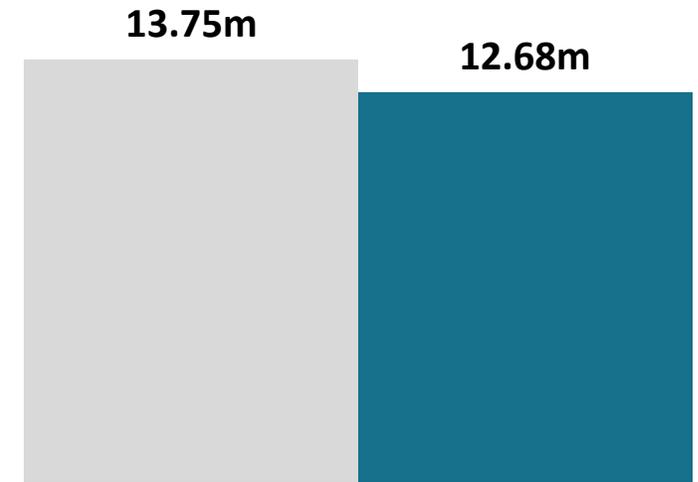
1,841,300



- 7.7% from 2022

## CYTD VISITOR DAYS

12,675,400



- 7.8% from 2022

■ Sep-22 ■ Sep-23

# CYTD SPENDING & ECONOMIC IMPACT

## CYTD DIRECT SPENDING

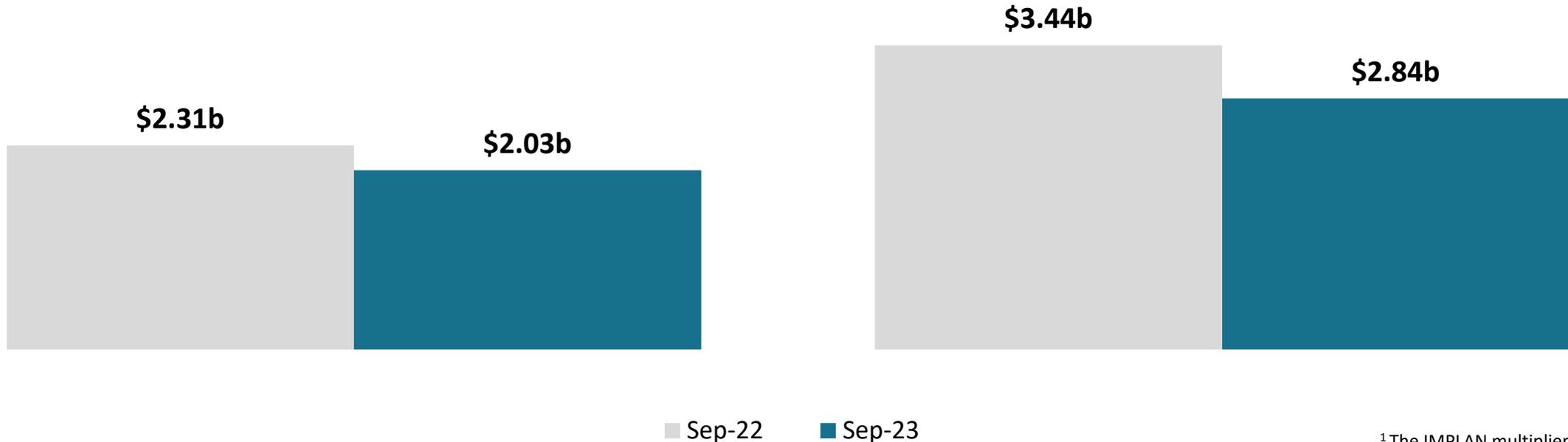
**\$2,027,306,500**

- 12.1% from 2022

## CYTD ECONOMIC IMPACT

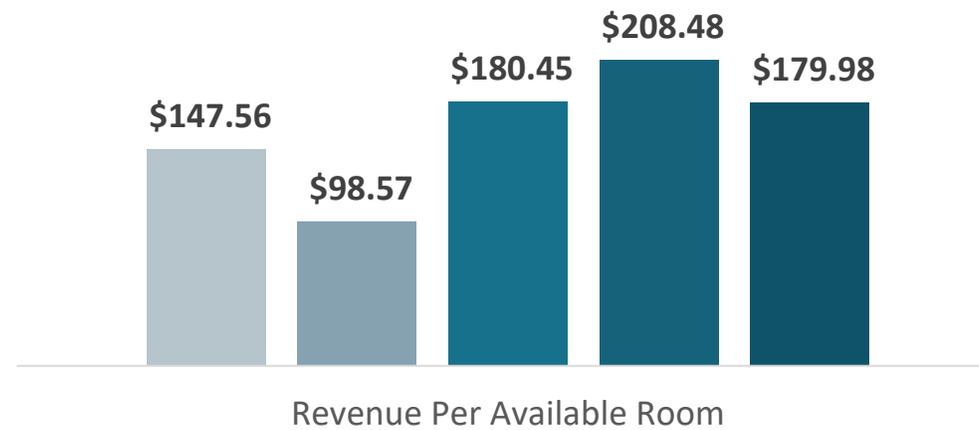
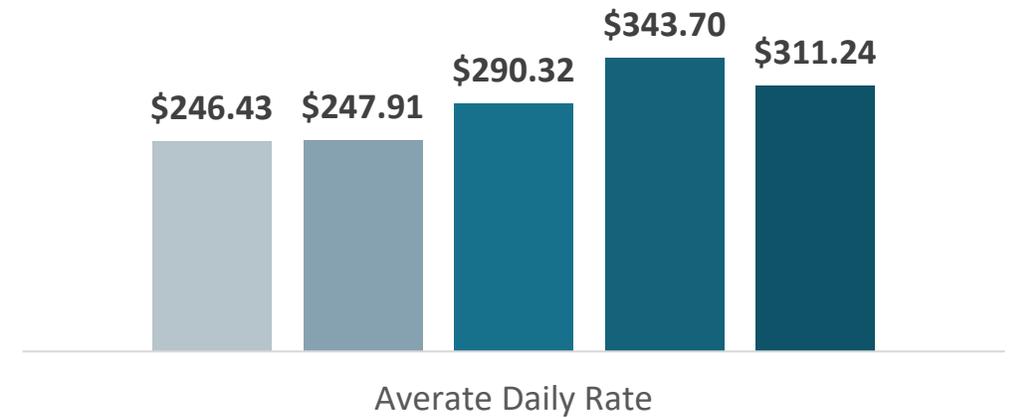
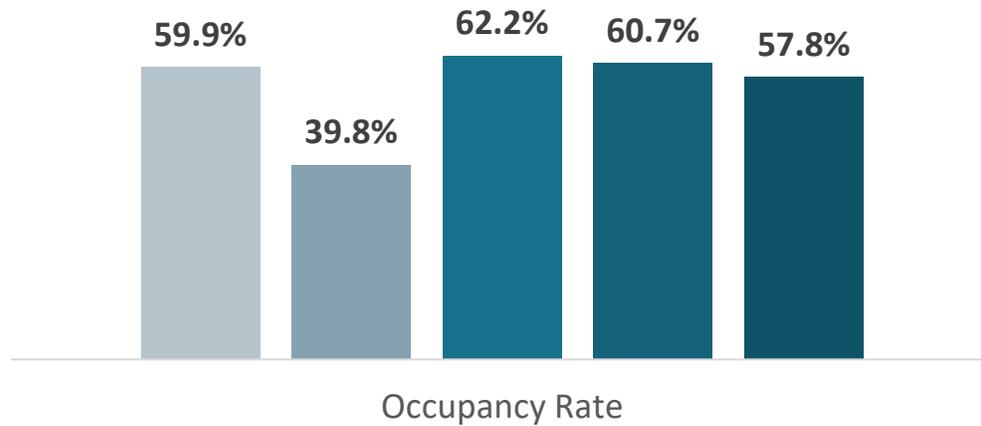
**\$2,837,964,600**

- 17.5% from 2022<sup>1</sup>



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

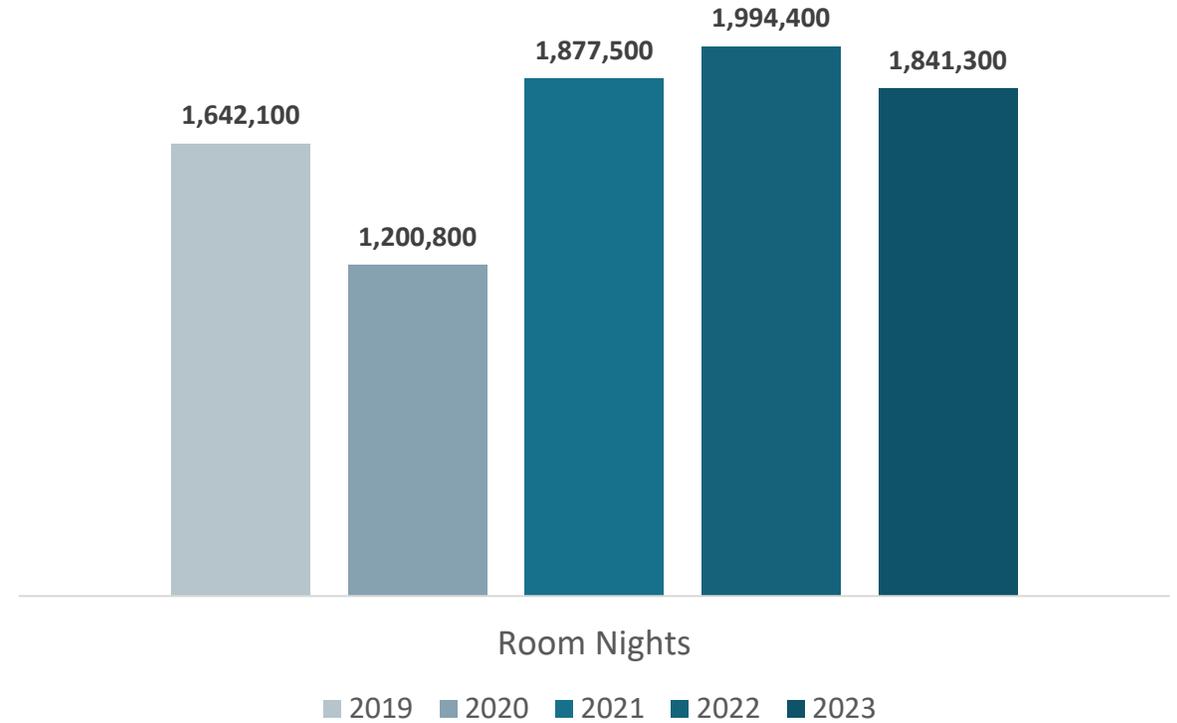
# CYTD 2019-2023 OVERALL LODGING METRICS<sup>1</sup>



■ 2019 ■ 2020 ■ 2021 ■ 2022 ■ 2023

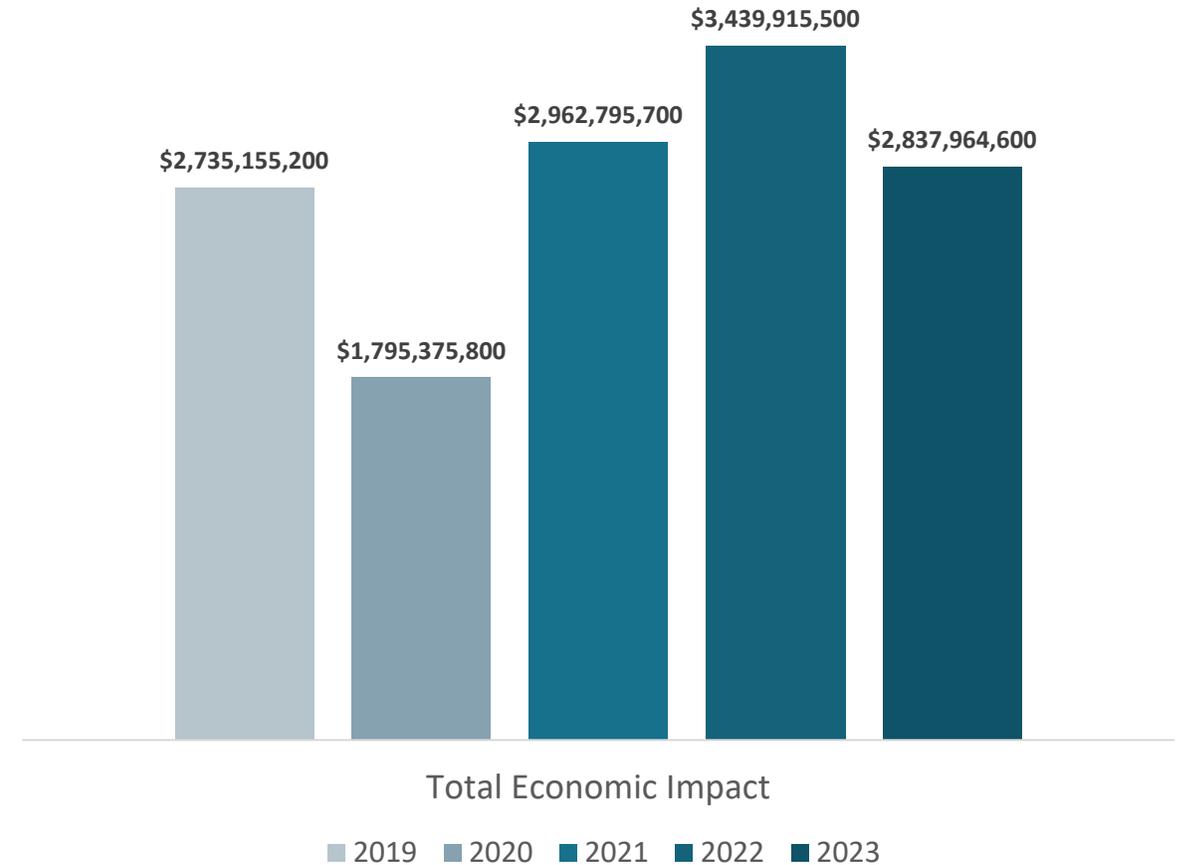
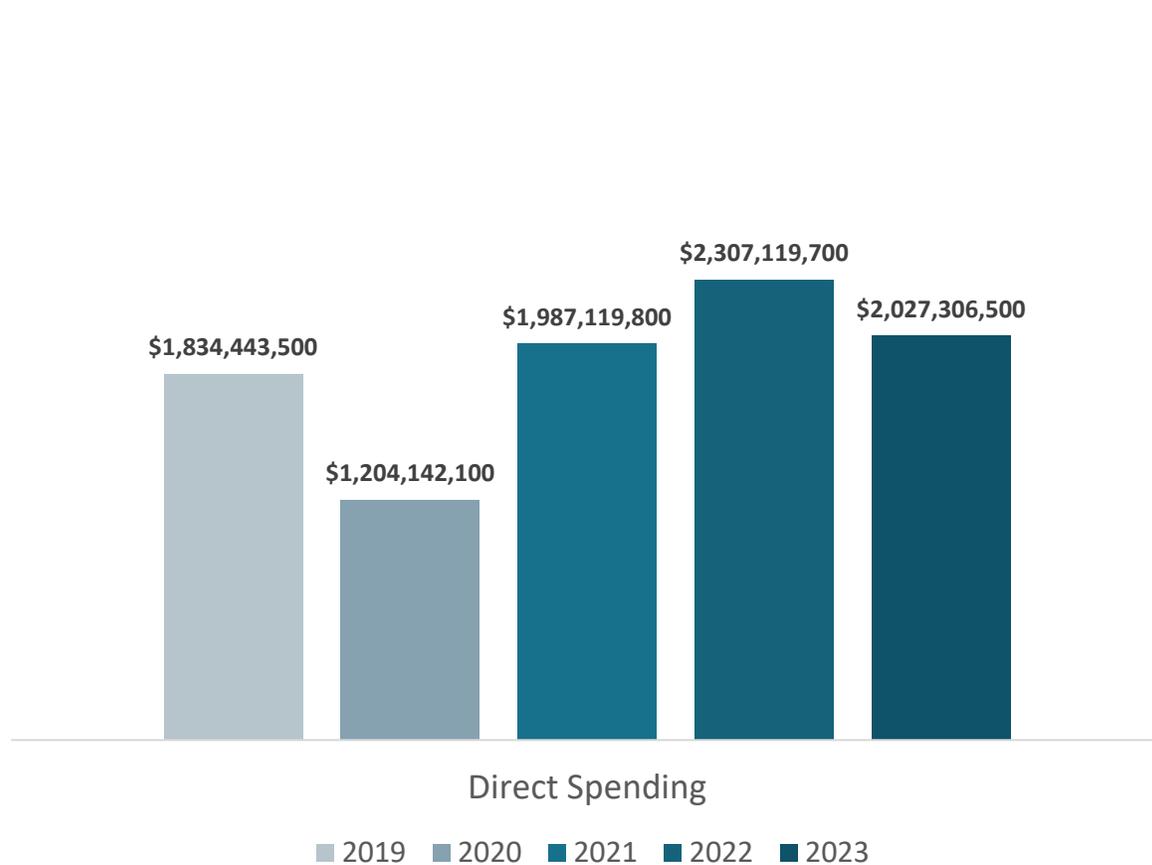
<sup>1</sup> Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

# CYTD 2019-2023 VISITATION & ROOM NIGHTS<sup>1</sup>



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

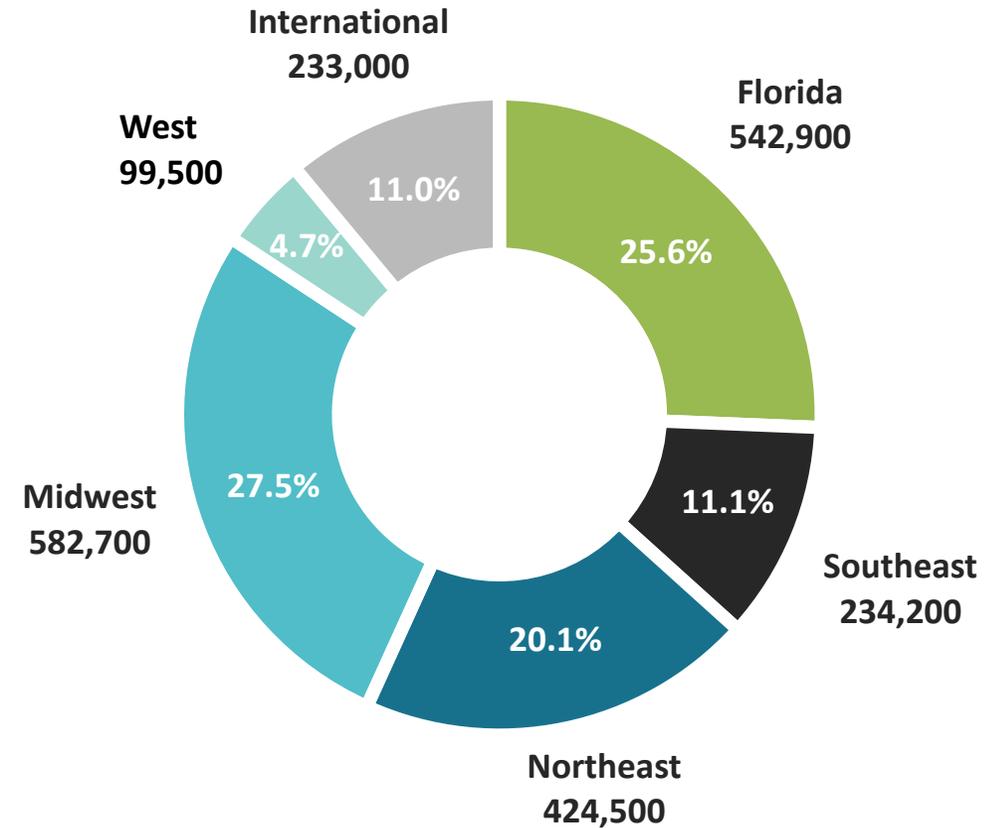
# CYTD 2019-2023 SPENDING & ECONOMIC IMPACT<sup>1</sup>

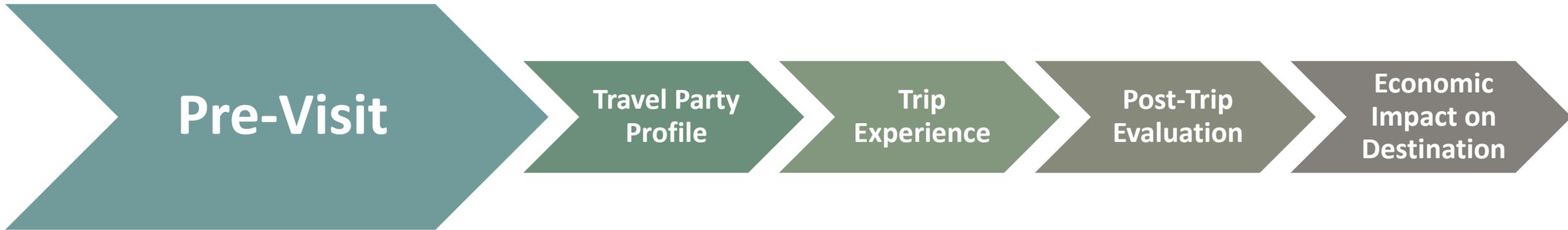


<sup>1</sup> Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

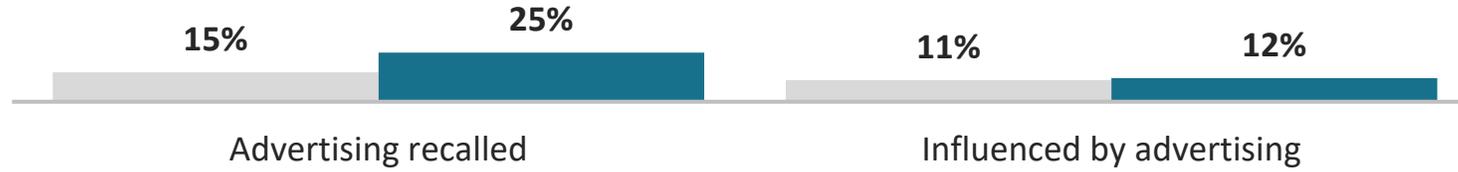
# CYTD 2023 VISITOR ORIGIN MARKETS

Region	CYTD 2022		CYTD 2023		Percent Change (Δ%)	
	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	573,600	24.1%	542,900	25.6%	-5.4%	6.6%
Southeast	286,900	12.0%	234,200	11.1%	-18.4%	-8.1%
Northeast	537,500	22.6%	424,500	20.1%	-21.0%	-11.1%
Midwest	672,500	28.2%	582,700	27.5%	-13.4%	-2.4%
West	128,200	5.4%	99,500	4.7%	-22.4%	-12.6%
Canada	60,700	2.5%	97,500	4.6%	60.6%	80.8%
Europe	73,900	3.1%	82,100	3.9%	11.1%	25.1%
C/S America	19,200	0.8%	30,100	1.4%	56.8%	76.5%
Other	30,700	1.3%	23,300	1.1%	-24.1%	-14.6%
<b>Total</b>	<b>2,383,200</b>	<b>100.0%</b>	<b>2,116,800</b>	<b>100.0%</b>		

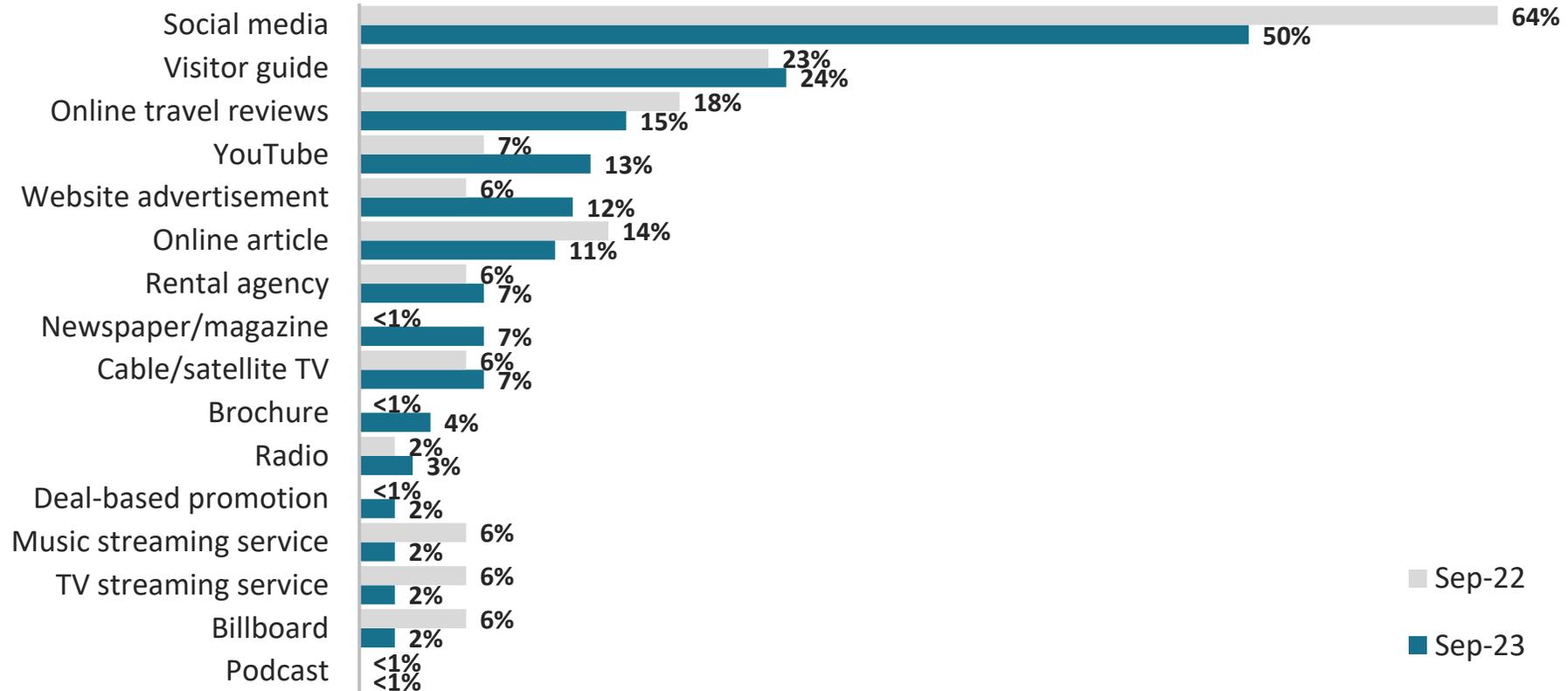




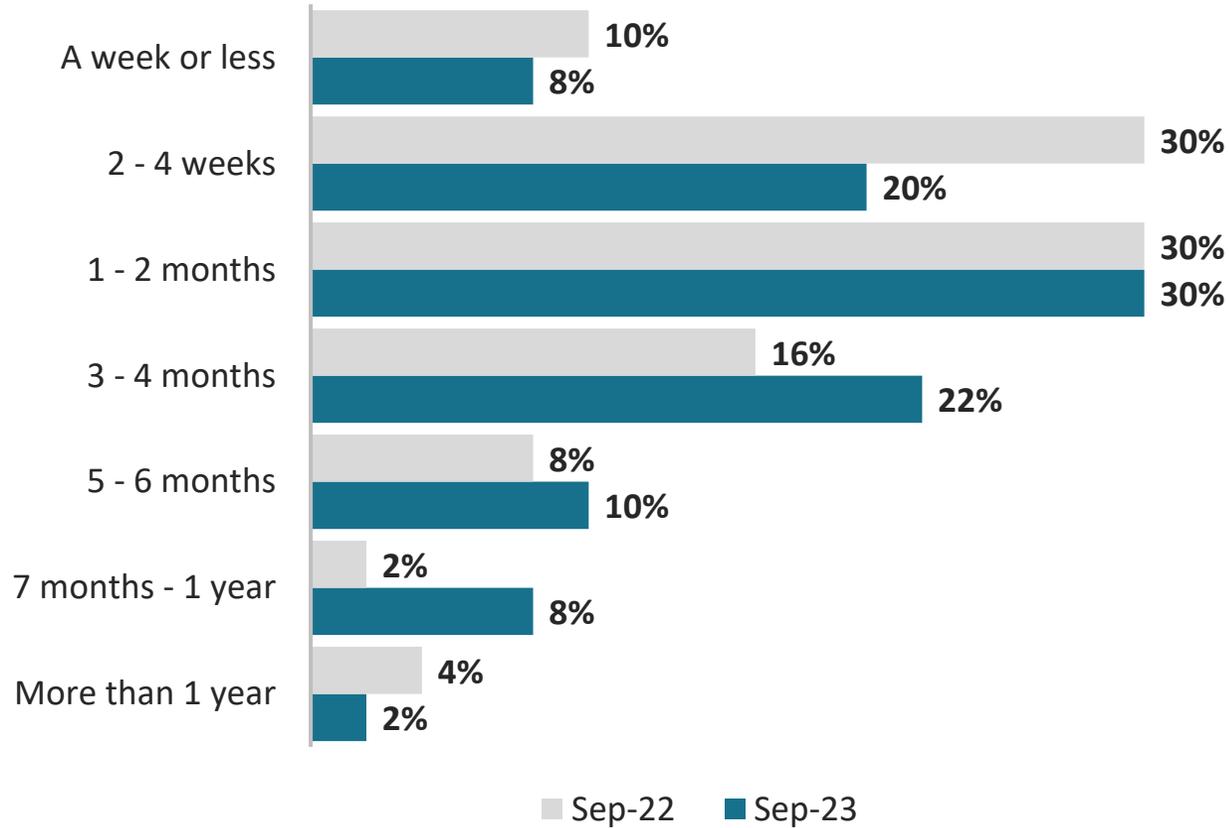
# ADVERTISING RECALL



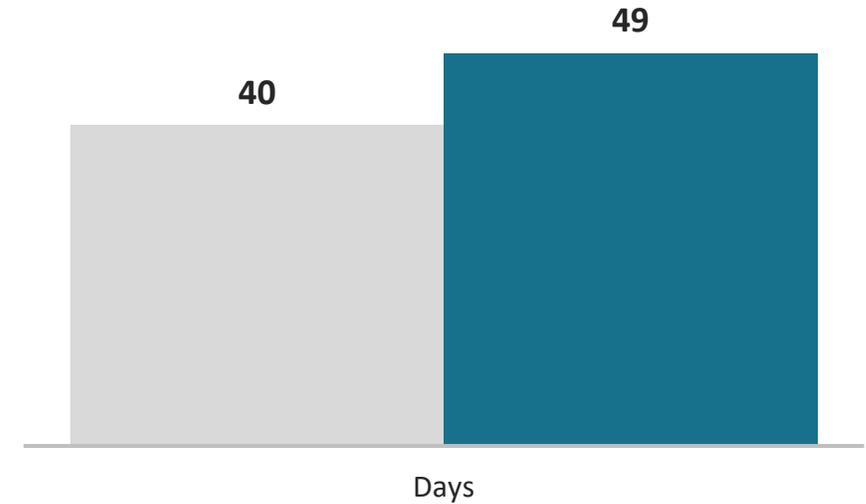
Base: % who recalled ads prior to their trip



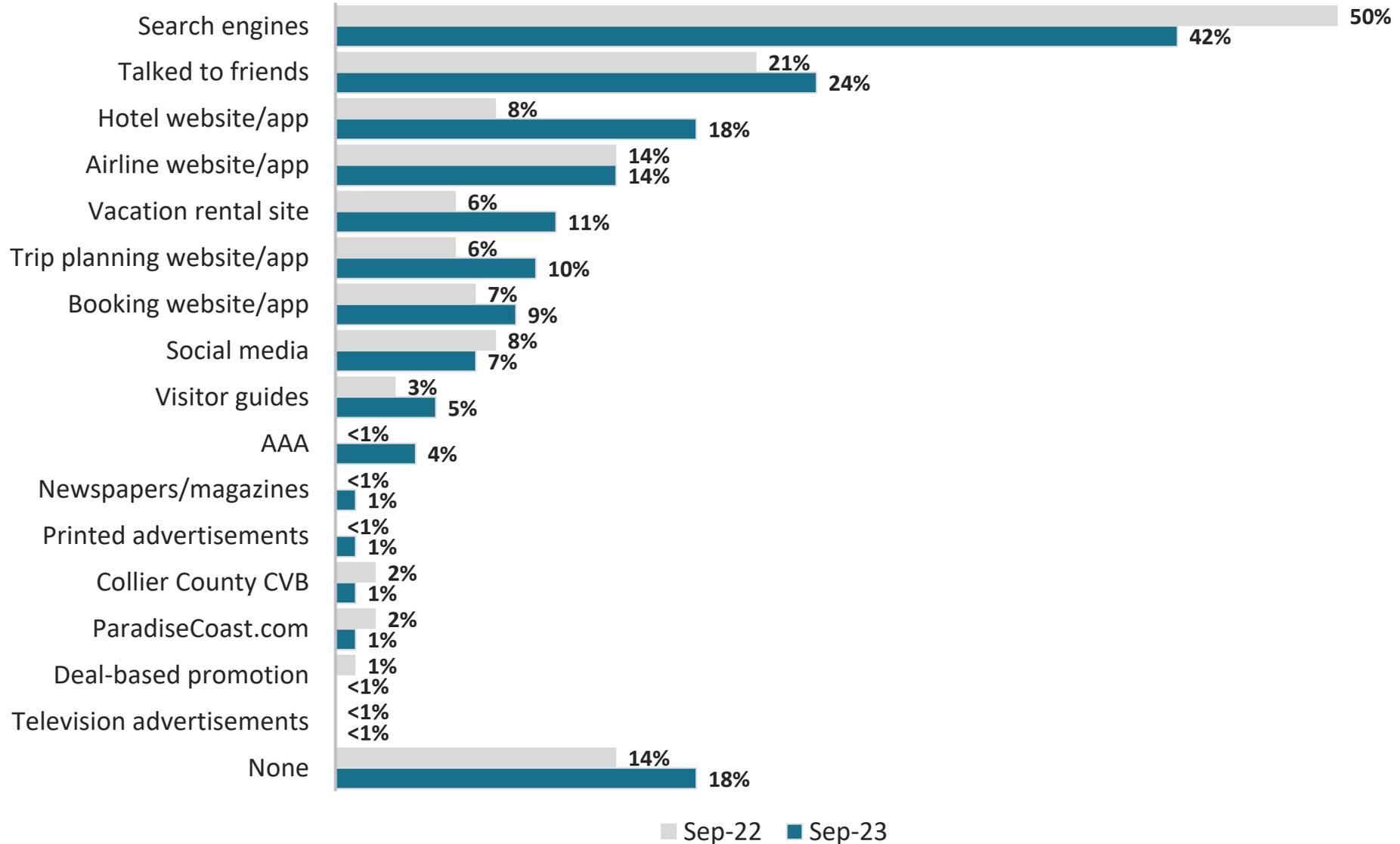
# TRIP PLANNING CYCLE



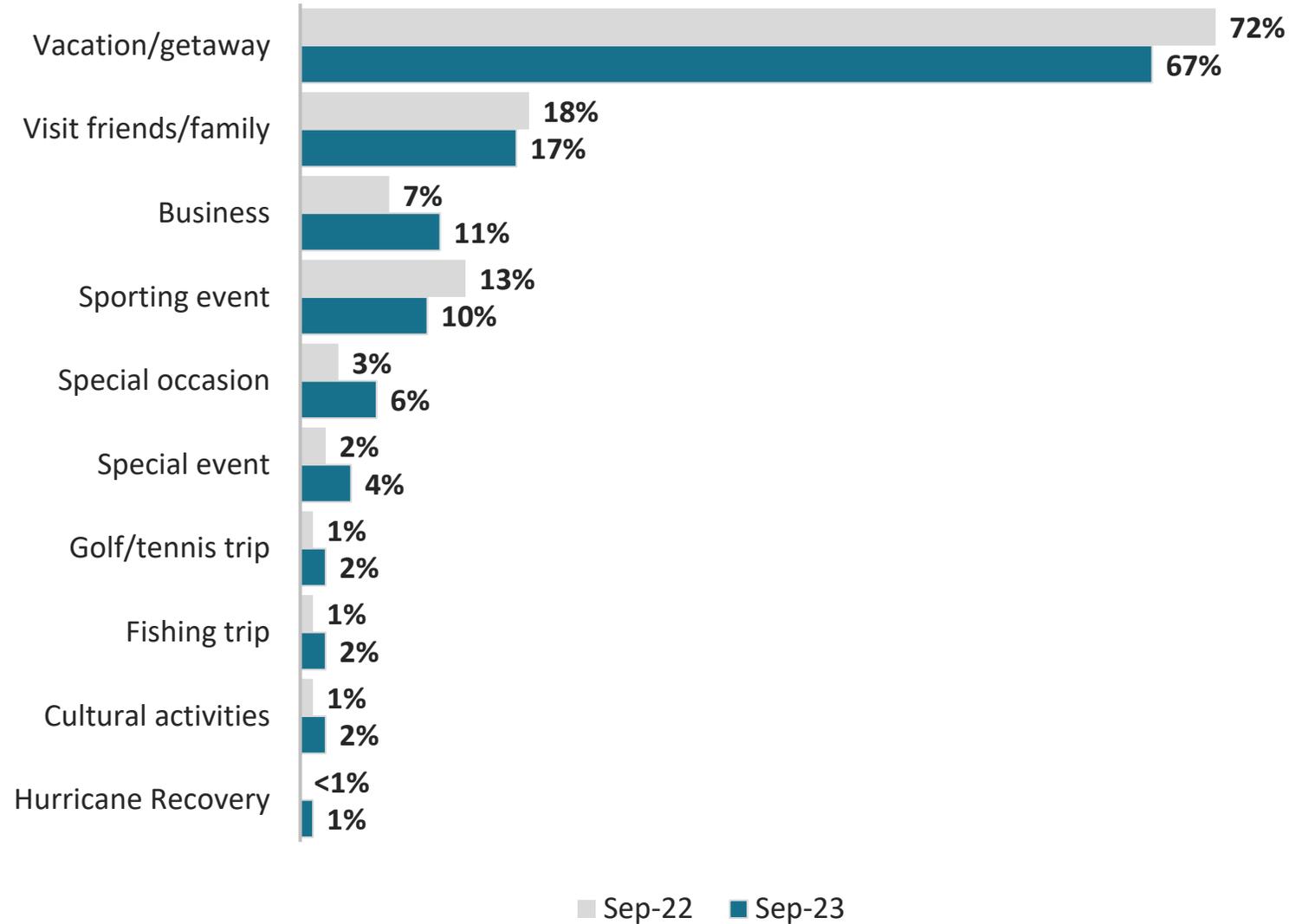
## Median Trip Planning Time



# TRIP PLANNING SOURCES

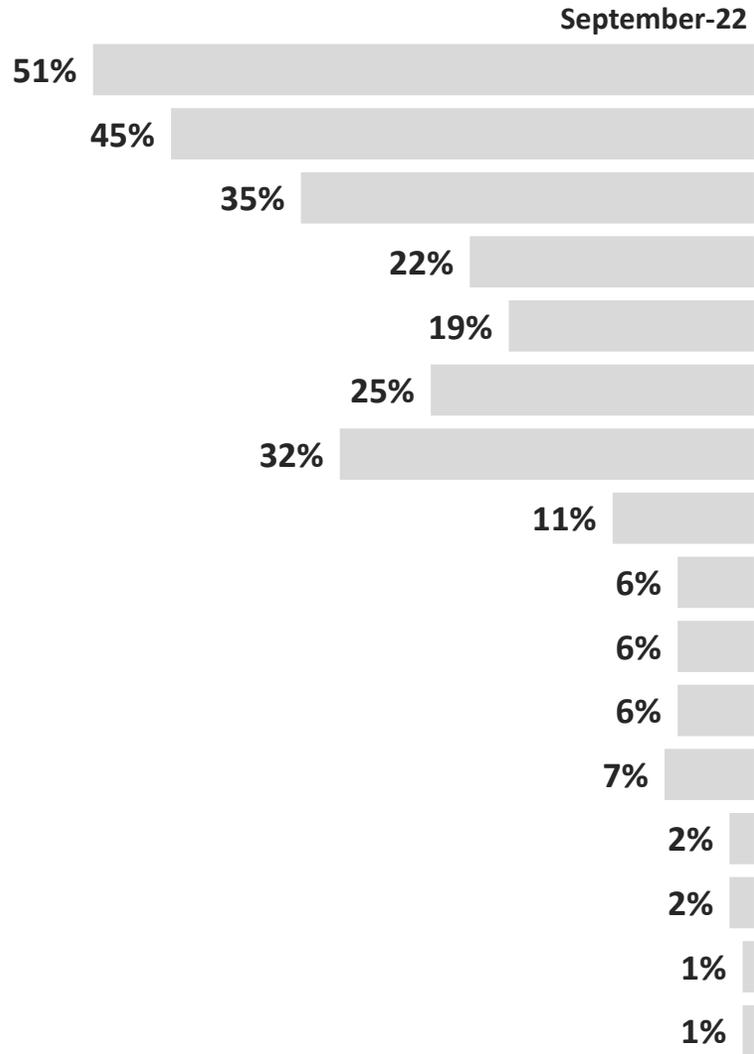


# REASONS FOR VISITING<sup>1</sup>

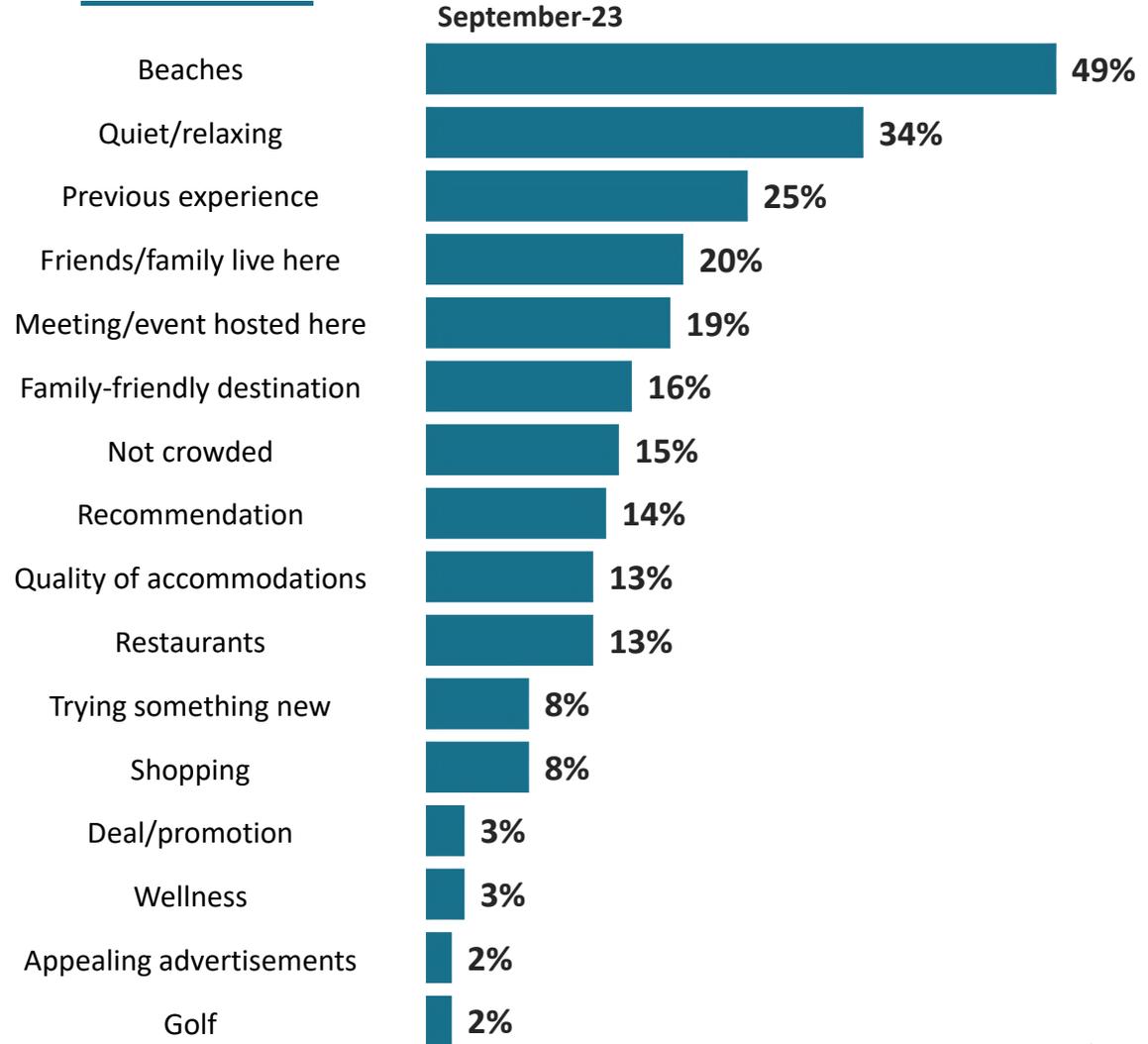


<sup>1</sup> Multiple responses permitted.

# REASONS FOR CHOOSING AREA

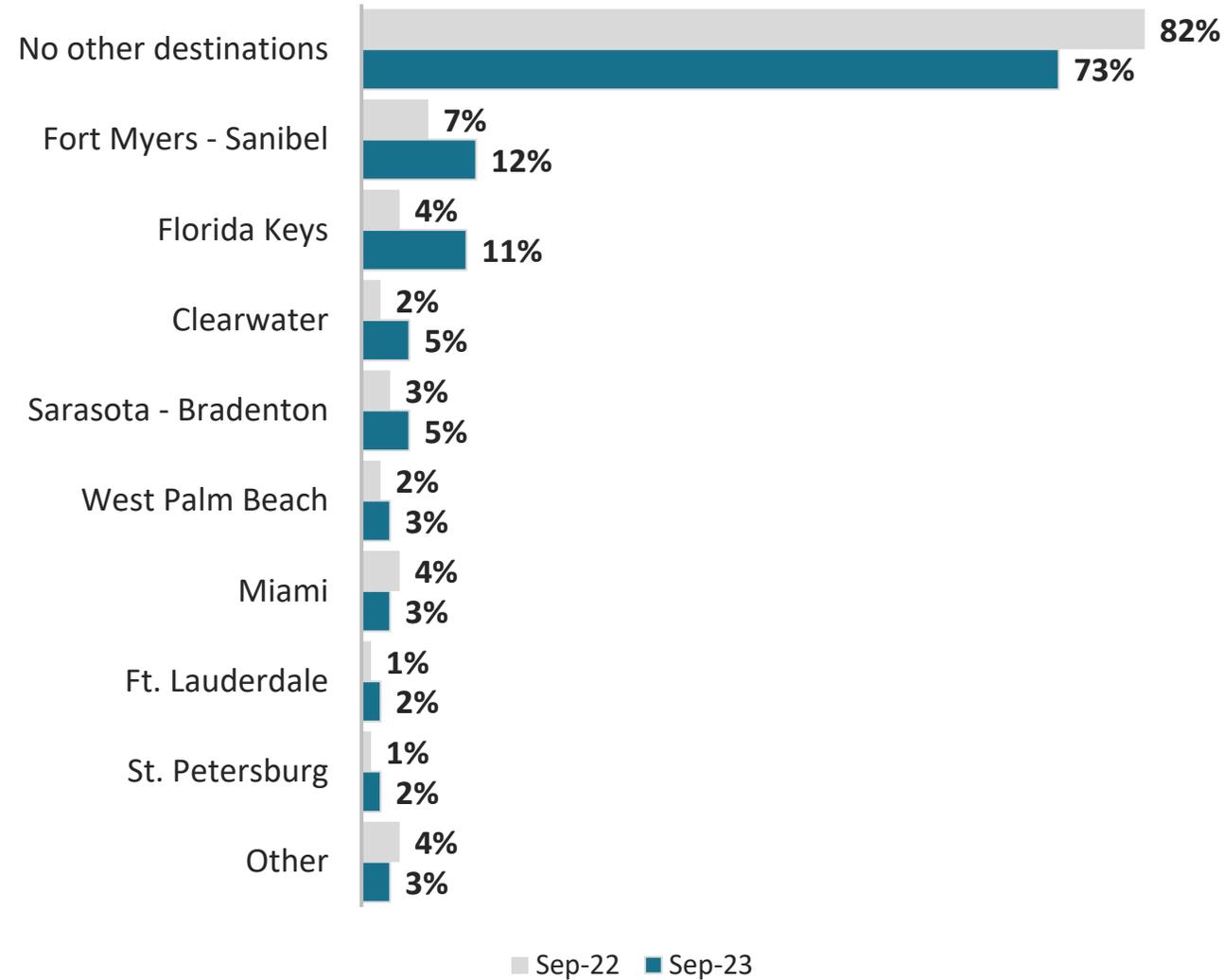


## Reasons<sup>1</sup>



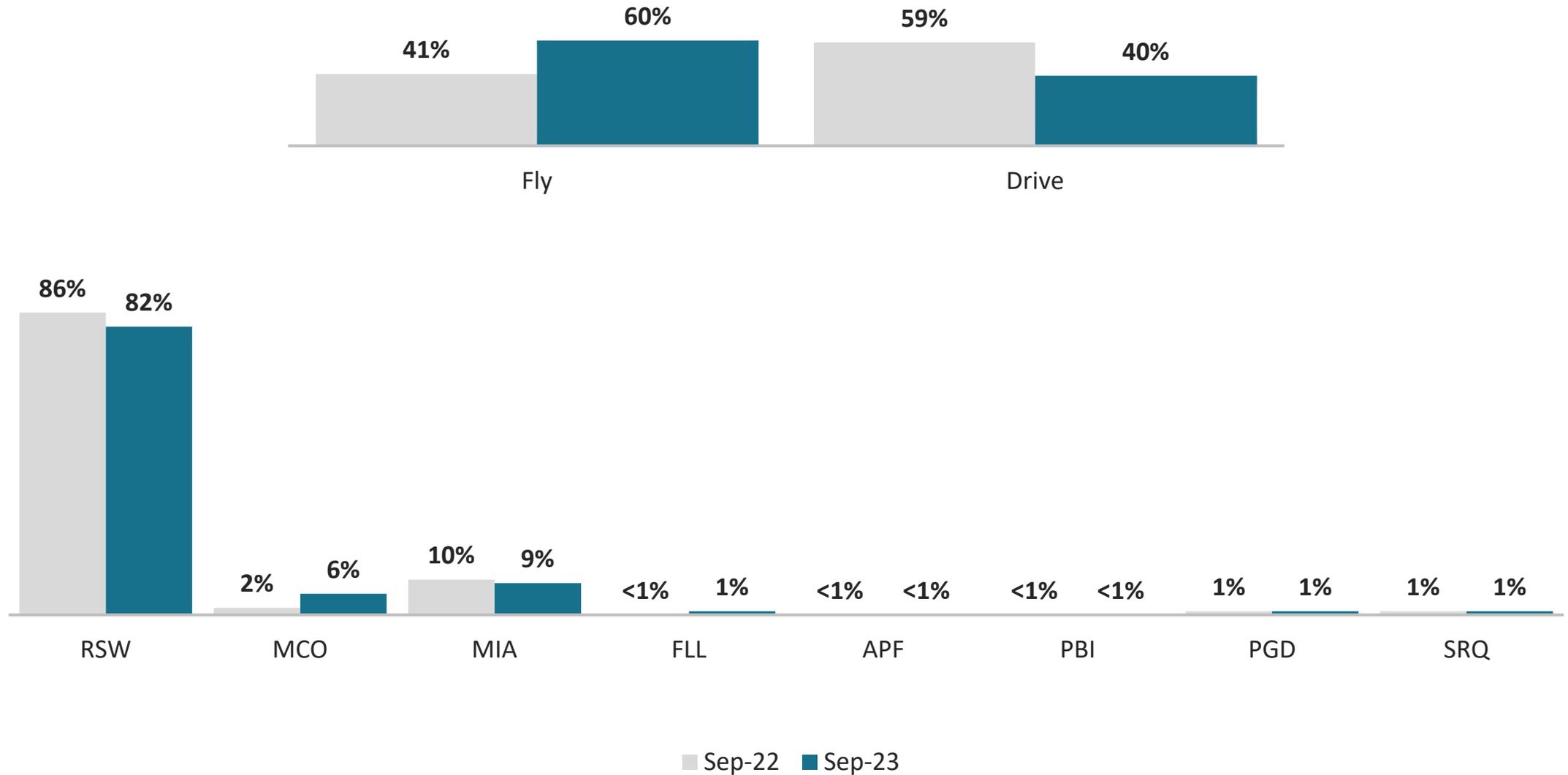
<sup>1</sup>Multiple responses permitted.

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

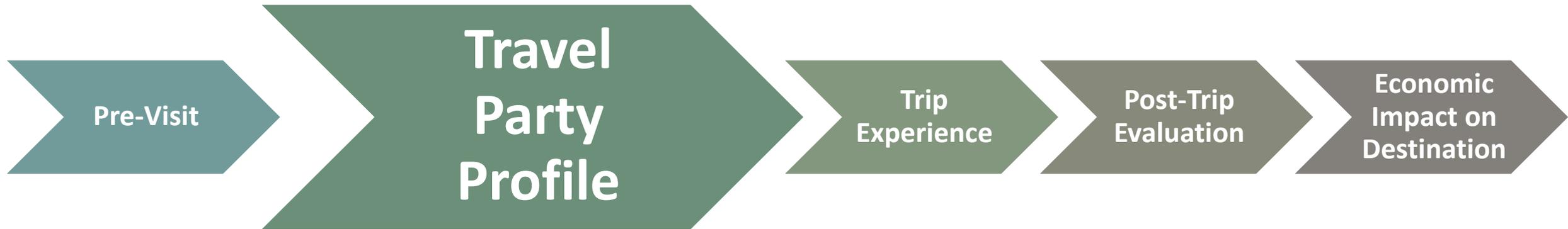


<sup>1</sup> Multiple responses permitted.

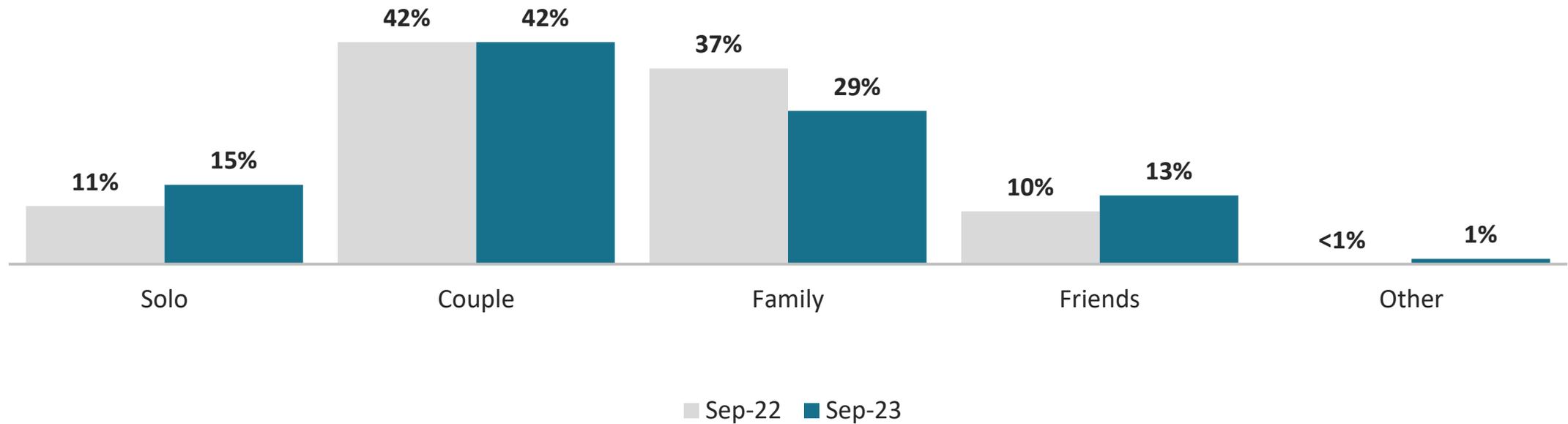
# TRANSPORTATION METHODS



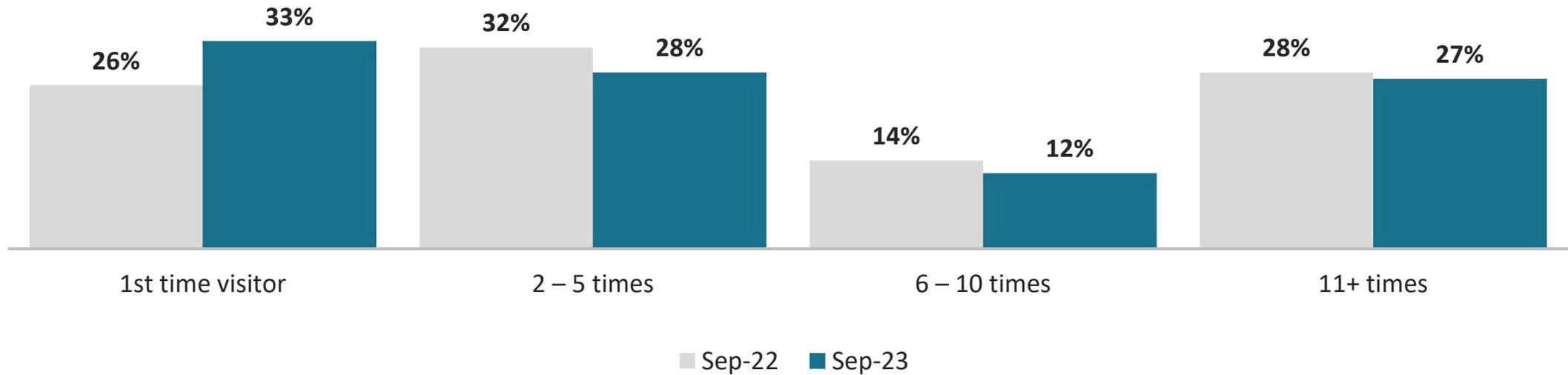
# VISITOR JOURNEY: TRAVEL PARTY PROFILE



## TRAVEL PARTY COMPOSITION

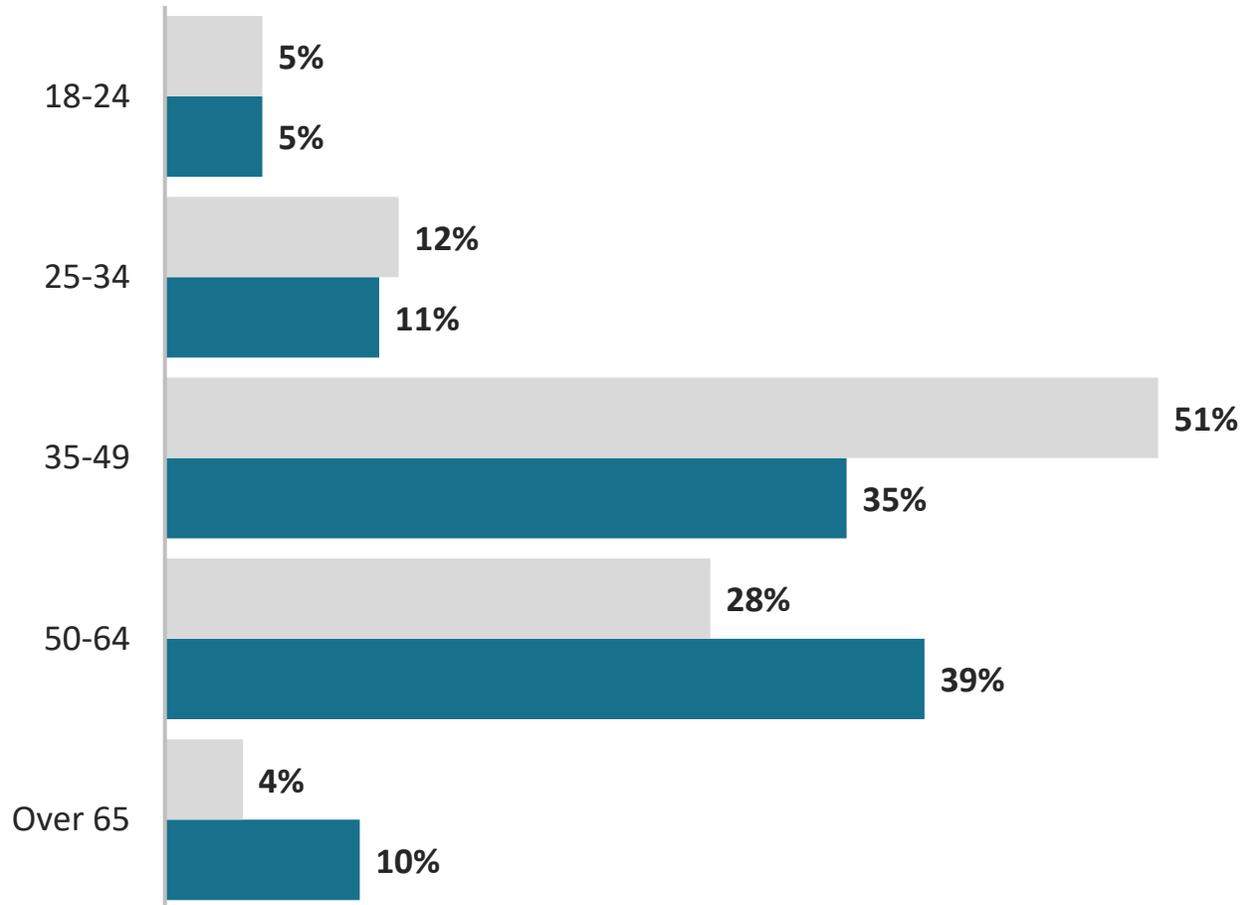


# PREVIOUS VISITS



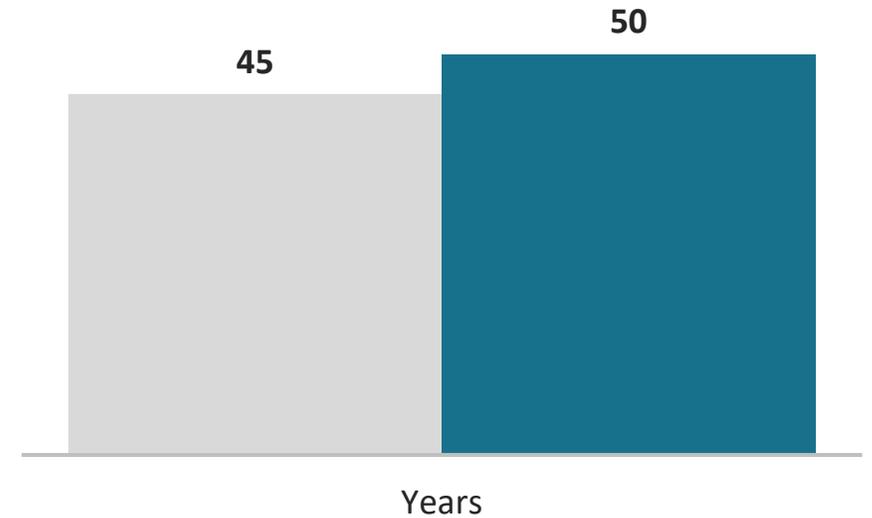
# VISITOR AGES

## Age



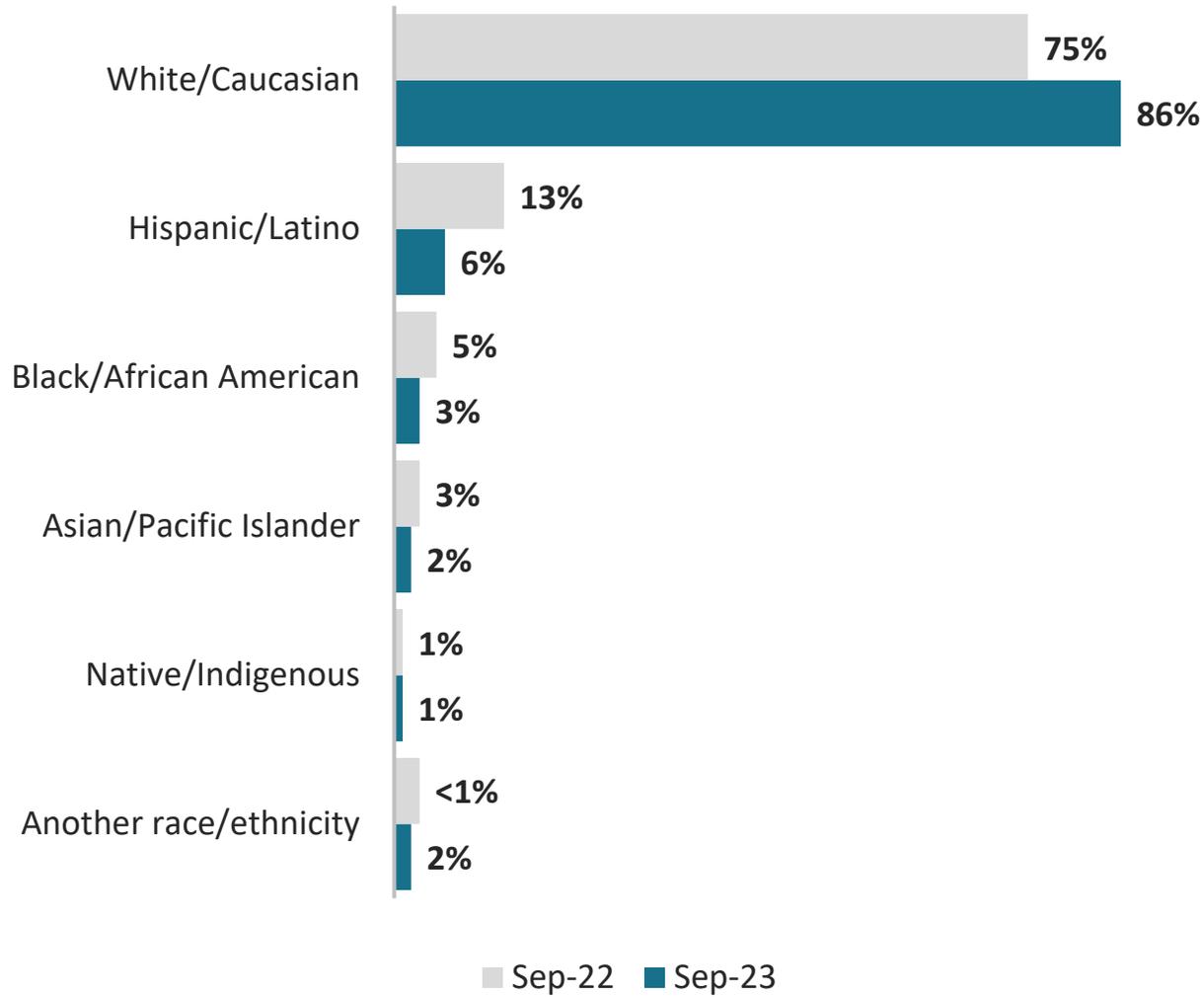
■ Sep-22 ■ Sep-23

## Median Age

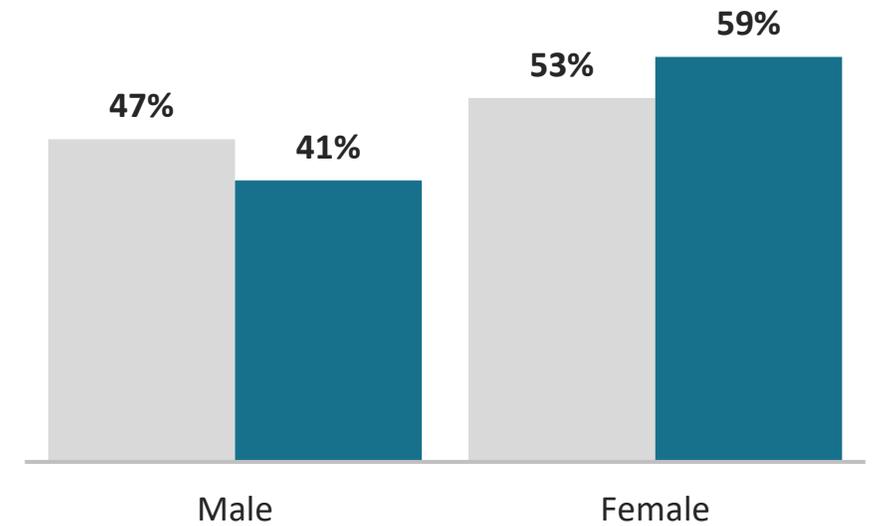


# VISITOR RACE & GENDER

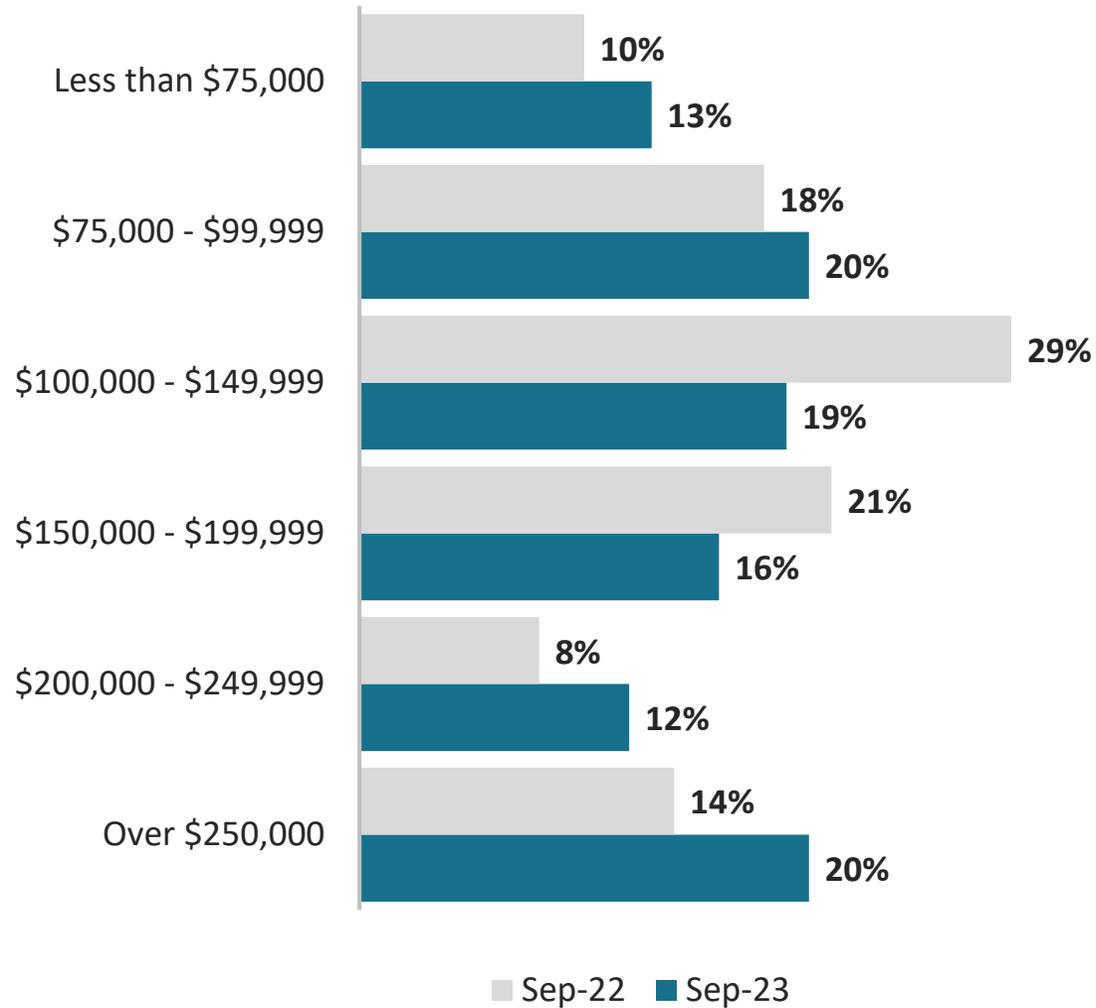
## Race



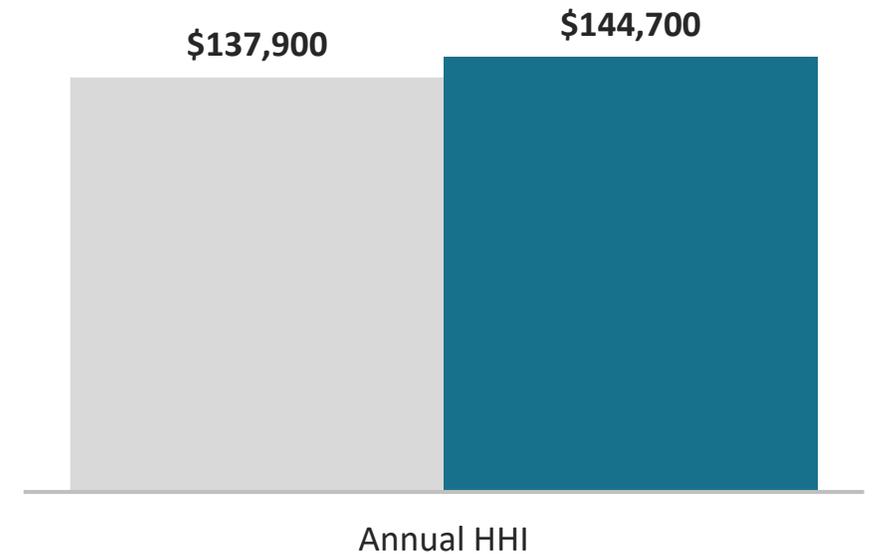
## Gender



## Income



## Median Household Income

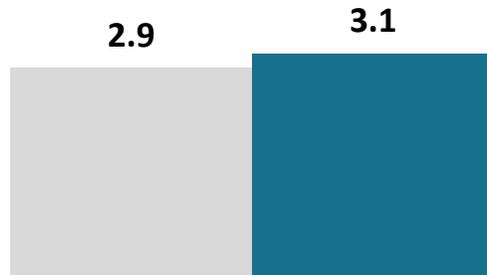


# VISITOR JOURNEY: TRIP EXPERIENCE



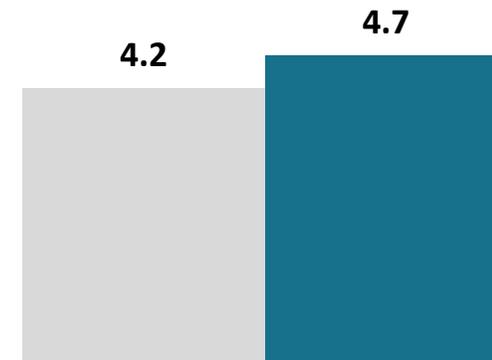
## TRAVEL PARTY SIZE

3.1



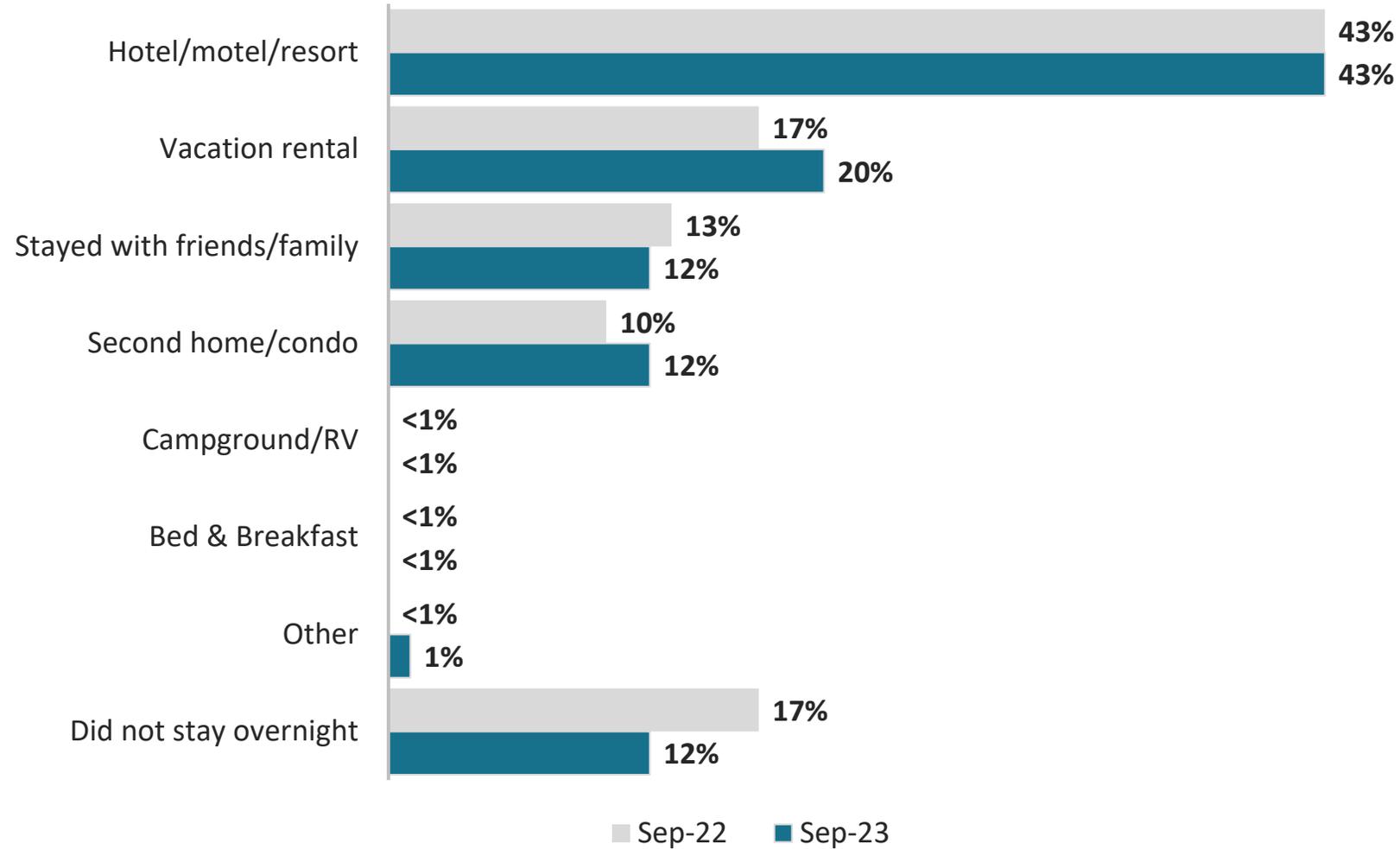
## NIGHTS STAYED

4.7

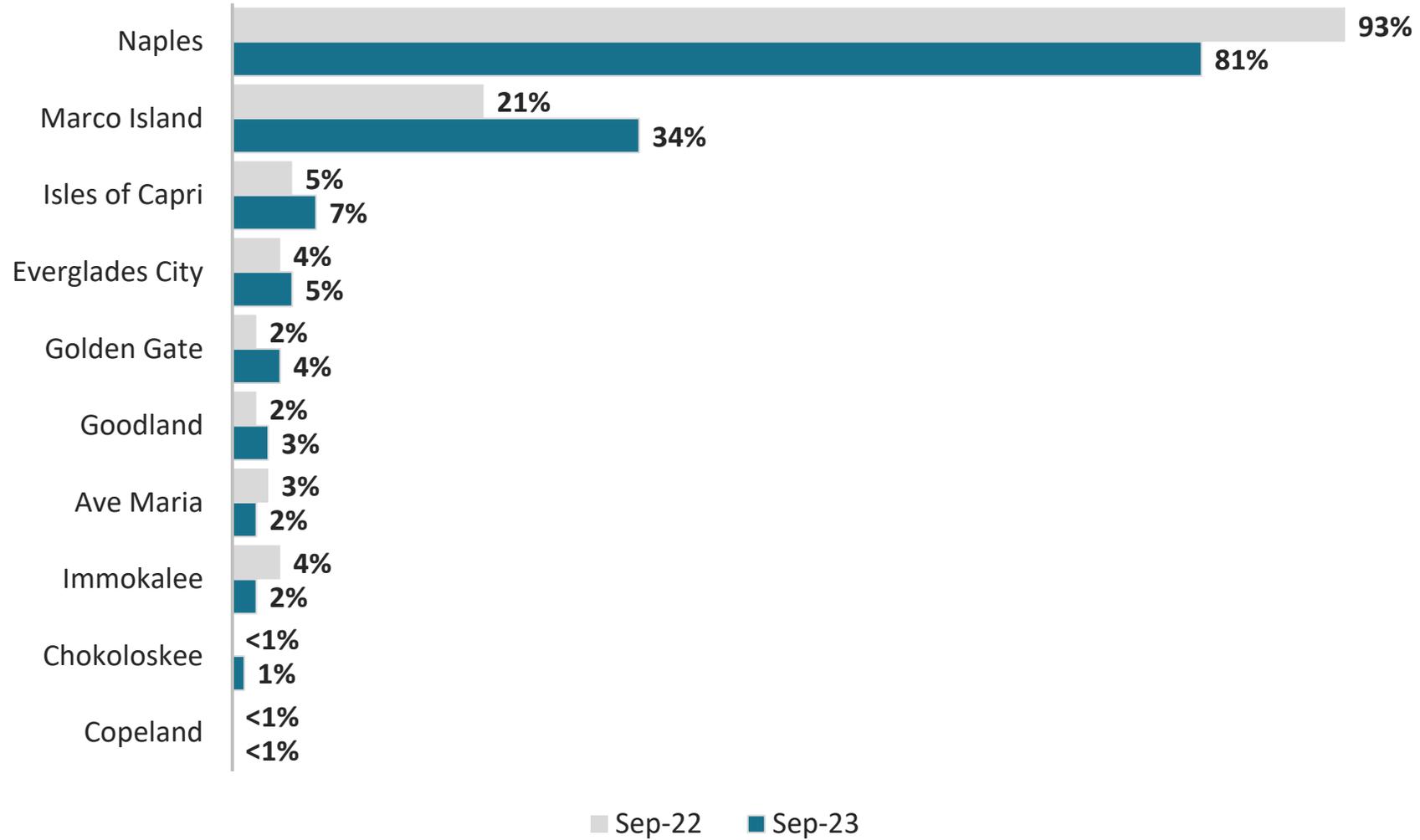


■ Sep-22   ■ Sep-23

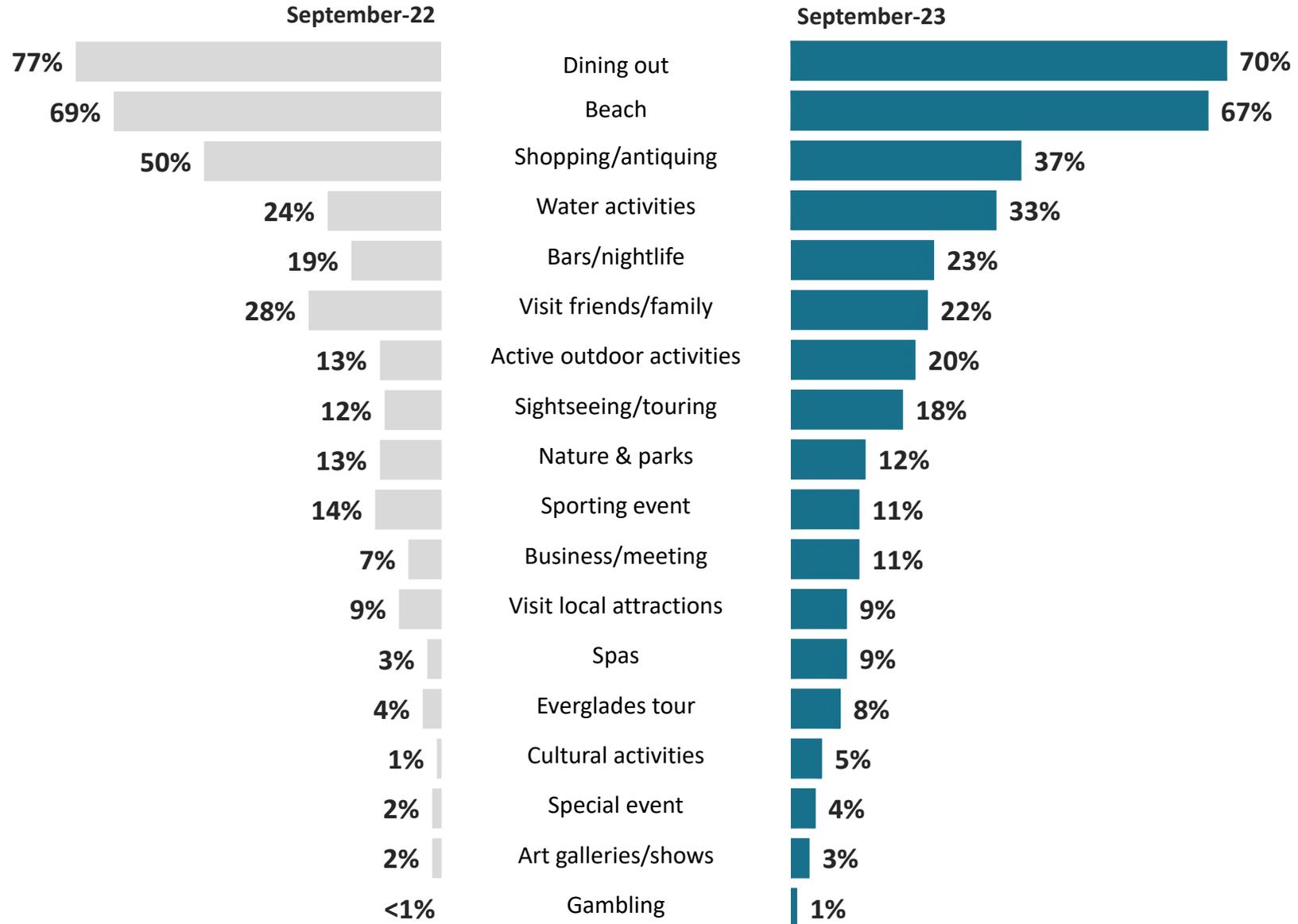
# TYPE OF ACCOMMODATIONS



# AREAS VISITED

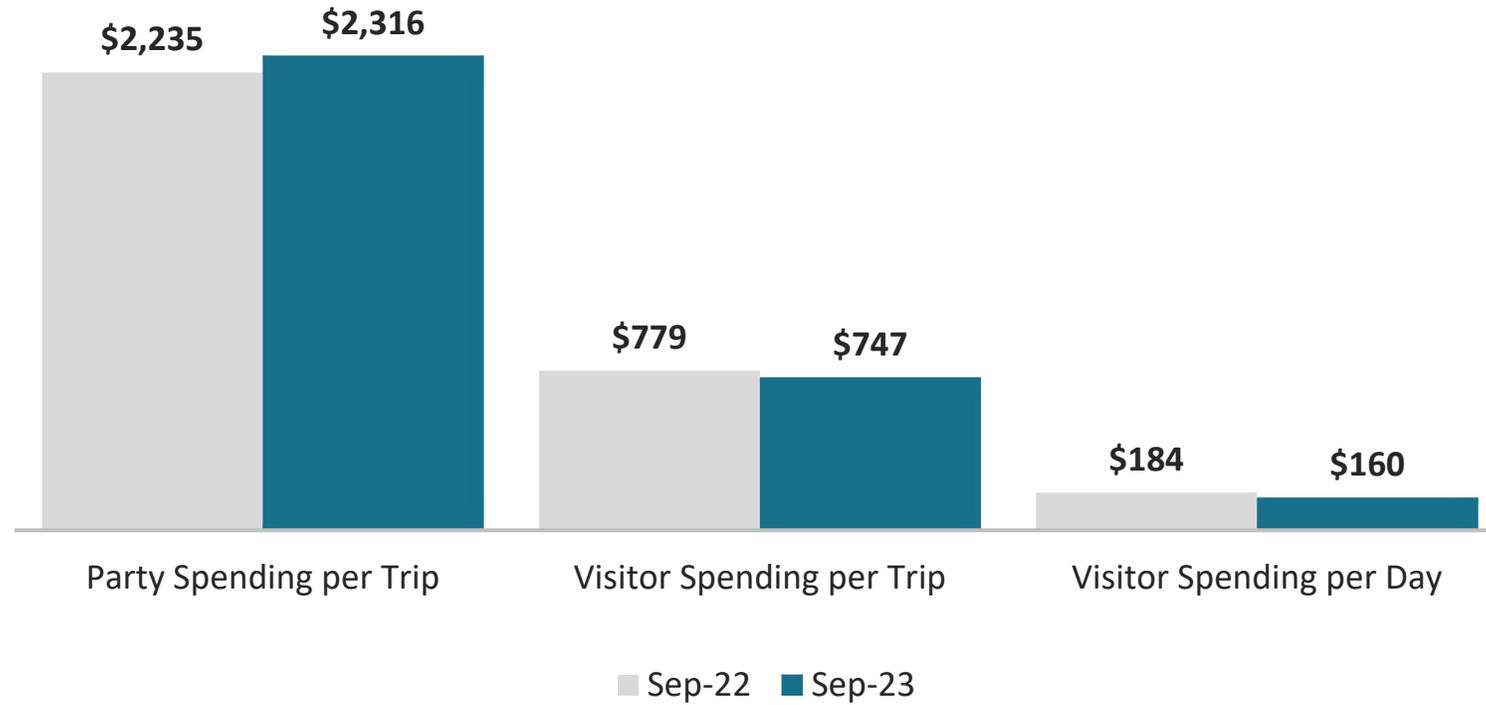


# TRIP ACTIVITIES



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

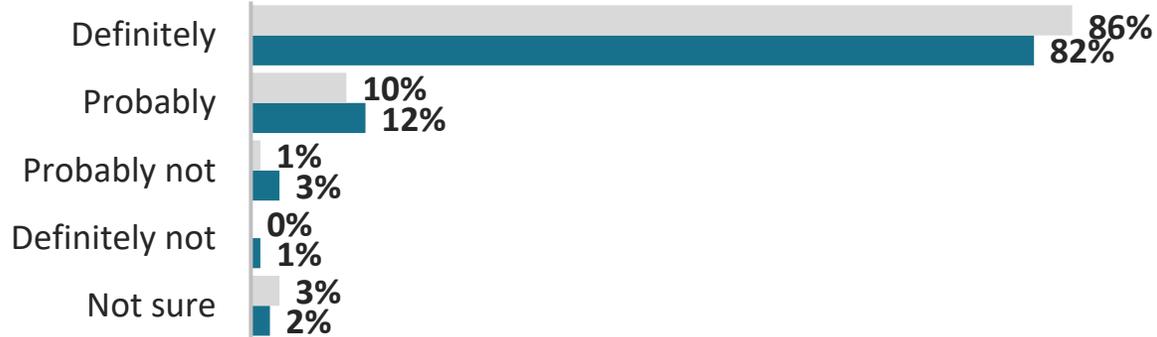
# VISITOR SPENDING



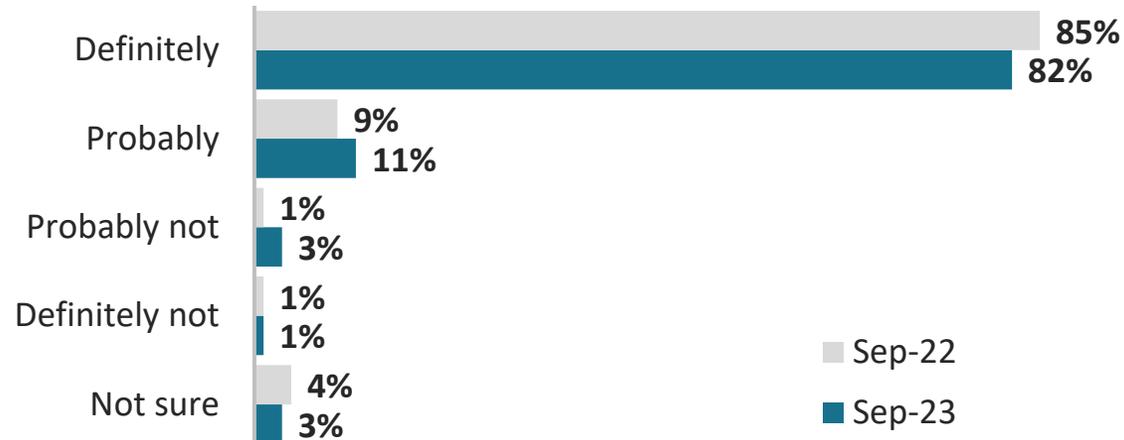
# VISITOR JOURNEY: POST-TRIP EVALUATION



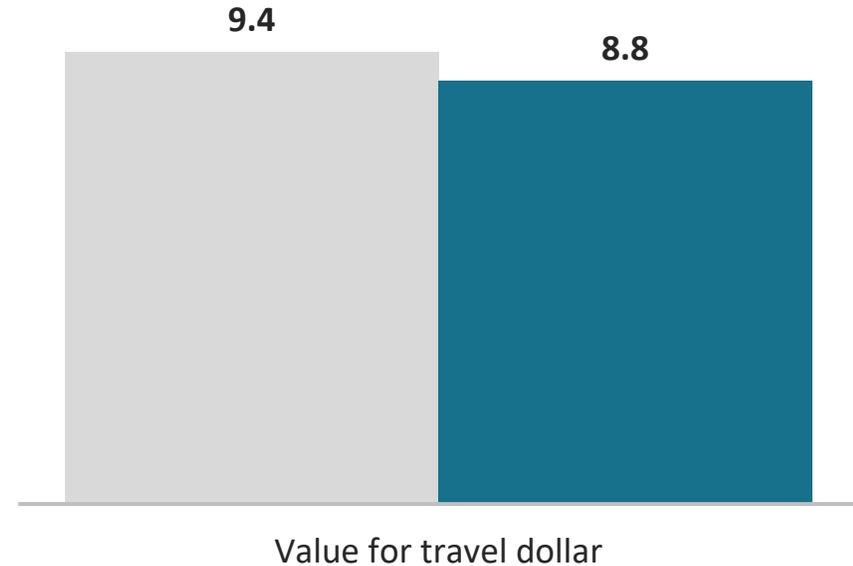
## Will recommend the Naples area?



## Will return to the Naples area?



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



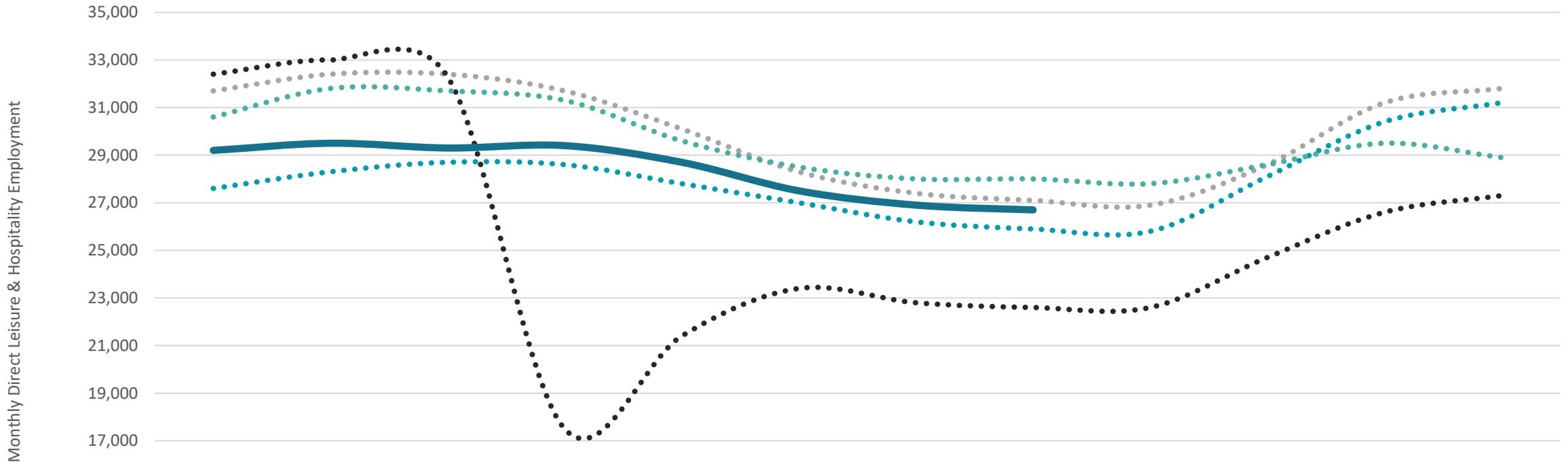
<sup>1</sup> 10-point scale where 10 is "excellent" and 1 is "poor".  
<sup>2</sup> All visitors who gave a rating of 6 or below cited high prices as their primary reason for giving lower ratings.

# INDUSTRY DATA



# LEISURE & HOSPITALTY EMPLOYMENT

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

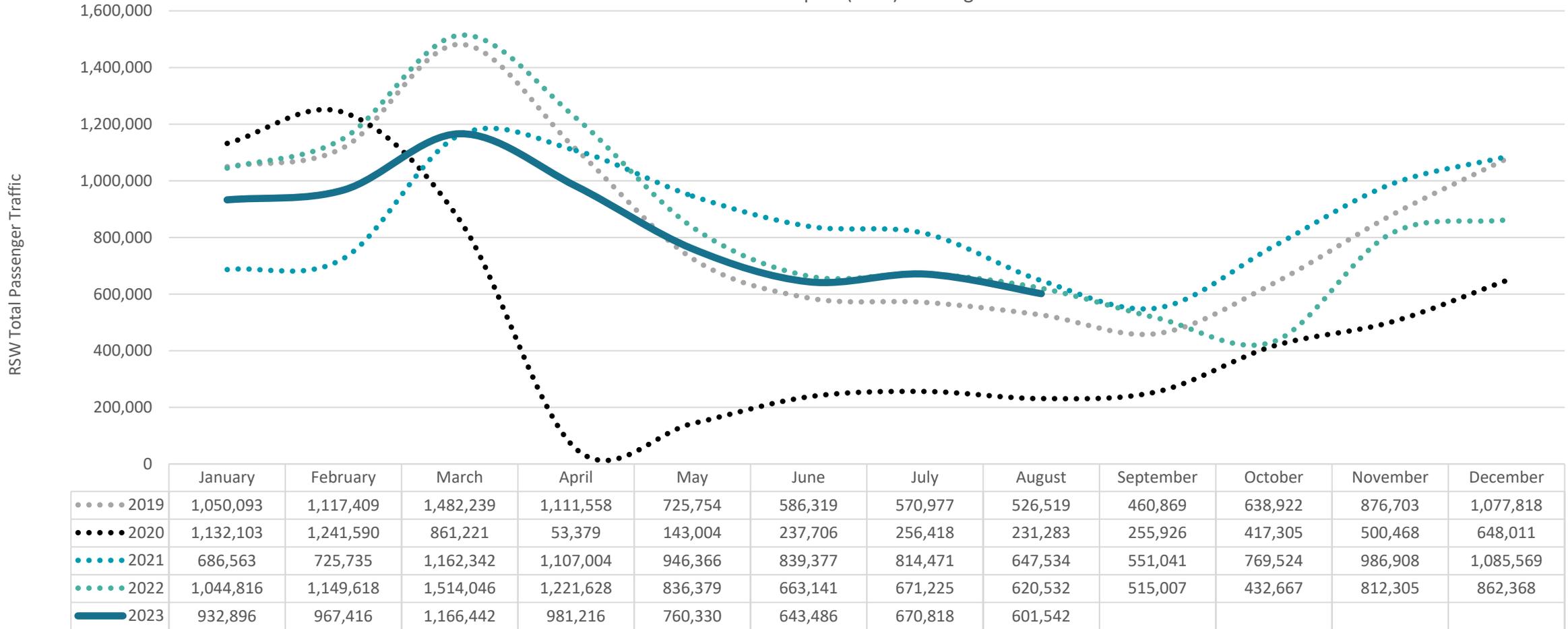


	January	February	March	April	May	June	July	August	September	October	November	December
••••• 2019	31,700	32,400	32,400	31,700	30,100	28,300	27,400	27,100	26,900	28,600	31,200	31,800
••••• 2020	32,400	33,000	32,300	17,500	21,400	23,400	22,800	22,600	22,600	24,700	26,600	27,300
••••• 2021	27,600	28,300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

<sup>1</sup> 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 Traffic<sup>1</sup>



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

# LICENSED TRANSIENT RENTAL UNITS

September 2023 Licensed Transient Rental Units <sup>1</sup>				
	Hotel	Motel	Vacation Rental	Total
Naples	4,452	1,368	2,888	8,708
Marco Island	1,275	121	1,774	3,170
Immokalee	0	70	104	174
Golden Gate	0	150	0	150
Everglades City	38	36	20	94
Chokoloskee	0	13	1	14
Goodland	0	5	5	10
Ave Maria	0	0	2	2
Ochopee	0	0	1	1
<b>Total</b>	<b>5,765</b>	<b>1,763</b>	<b>4,795</b>	<b>12,323<sup>2</sup></b>

<sup>1</sup>SOURCE: Florida Department of Business & Professional Regulation.

<sup>2</sup>Some units are still unavailable due to the impact of Hurricane Ian.

# NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau  
September 2023 Monthly Dashboard

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