



NAPLES • MARCO ISLAND EVERGLADESSM

FLORIDA'S PARADISE COAST

April 2025 Monthly Visitor Dashboard

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MONTHLY
HIGHLIGHTS

April 2025 | TOURISM METRICS

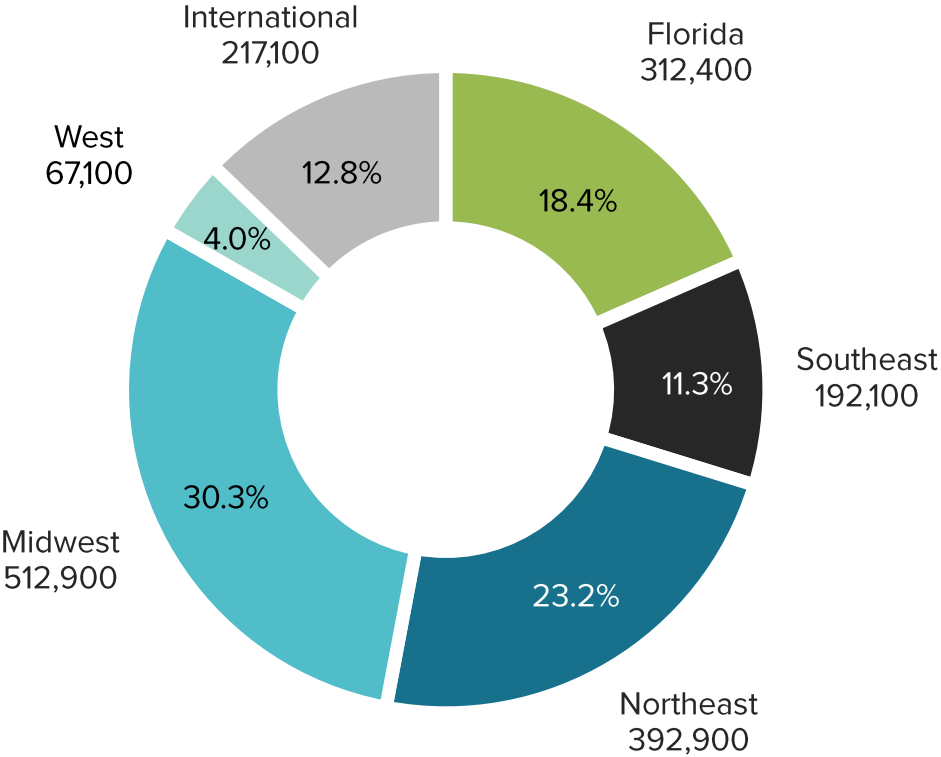
Metric	April 2024	April 2025	Percent Change
Visitors	239,900	227,200	- 5.3%
Visitor Days	1,712,900	1,765,300	+ 3.1%
Direct Spending	\$320,036,700	\$318,786,200	- 0.4%
Economic Impact	\$443,570,900	\$440,562,500	- 0.7%
Room Nights	251,700	259,600	+ 3.1%
Occupancy	64.3%	67.0%	+ 4.2%
Average Daily Rate	\$378.44	\$381.91	+ 0.9%
RevPAR	\$243.34	\$255.88	+ 5.2%

FYTD 2025 | TOURISM METRICS

Metric	FYTD 2024	FYTD 2025	Percent Change
Visitors	1,689,900	1,694,500	+ 0.3%
Visitor Days	11,176,700	12,063,300	+ 7.9%
Direct Spending	\$1,994,606,100	\$2,005,361,900	+ 0.5%
Economic Impact	\$2,765,716,700	\$2,771,920,300	+ 0.2%
Room Nights	1,756,400	1,817,100	+ 3.5%
Occupancy	65.0%	65.5%	+ 0.8%
Average Daily Rate	\$408.09	\$386.29	- 5.3%
RevPAR	\$265.26	\$253.02	- 4.6%

FYTD 2025 | VISITOR ORIGIN

Region	FYTD 2024		FYTD 2025		Percent Change (±Δ%)	
	# Visitors	% Share	# Visitors	% Share	# Visitors	% Share
Florida	344,400	20.4%	312,400	18.4%	- 9.3%	- 9.5%
Southeast	187,200	11.1%	192,100	11.3%	+ 2.6%	+ 2.3%
Northeast	379,900	22.5%	392,900	23.2%	+ 3.4%	+ 3.1%
Midwest	471,900	27.9%	512,900	30.3%	+ 8.7%	+ 8.4%
West	84,200	5.0%	67,100	4.0%	- 20.3%	- 20.5%
Canada	90,400	5.3%	92,000	5.4%	+ 1.8%	+ 1.5%
Europe	93,800	5.5%	87,100	5.1%	- 7.1%	- 7.4%
C/S America	18,500	1.2%	20,100	1.2%	+ 8.6%	+ 8.4%
Other	19,600	1.1%	17,900	1.1%	- 8.7%	- 8.9%
Total	1,689,900	100.0%	1,694,500	100.0%		



Highlights

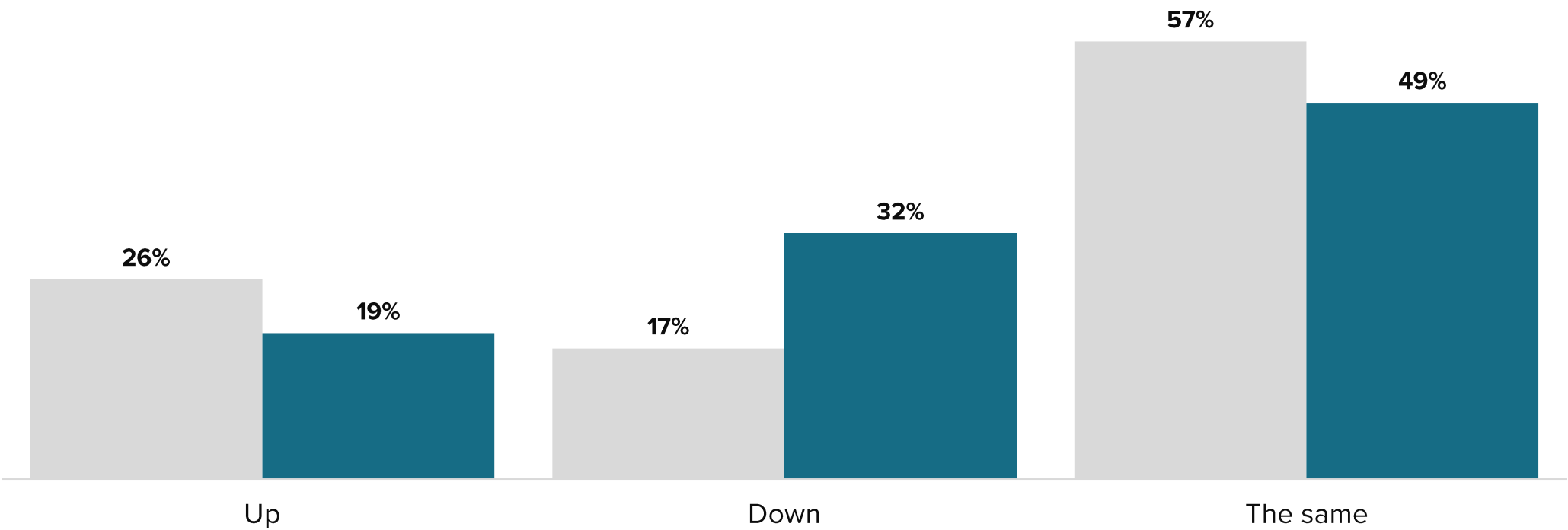
- Visitation declined 5.3% year-over-year; however, both Visitor Days & Room Nights increased by 3.1%, driven by a continued rise in Average Length of Stay. Decline in visitation was driven mostly by a drop in day trippers.
- Direct Visitor Spending fell by 0.4%, with Total Economic Impact down 0.7% year-over-year.
- Hotel Industry Trends in April 2025 in Collier County:
 - Hotel room supply increased 7.7%, while room demand rose 11.3% year-over-year.
 - Average Daily Rate (ADR) & Revenue Per Available Room (RevPAR) ranked second in the competitive set, behind only the Florida Keys.
 - Occupancy reached 72.3%, supported by a 16.4% increase in leisure demand.
- International visitation was down 7.9% compared to April 2024, but only due to a 19.4% decrease in Canadian visitation, with visitation from all other international markets increasing.

Potential Areas of Concern

- Group hotel bookings as a share of total hotel bookings are still the 3rd highest in the competitive set FYTD, but group demand fell 3.3% in April, the second consecutive month of group demand declining year-over-year.
- 42% of visitors reported considering other destinations before booking, an all-time high for April, highlighting intensifying competition. Top alternatives considered included Sarasota-Bradenton, Fort Myers-Sanibel, and international destinations (Europe, the Caribbean, South America, etc.).

3-MONTH FORECAST¹ | MAY - JULY

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



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

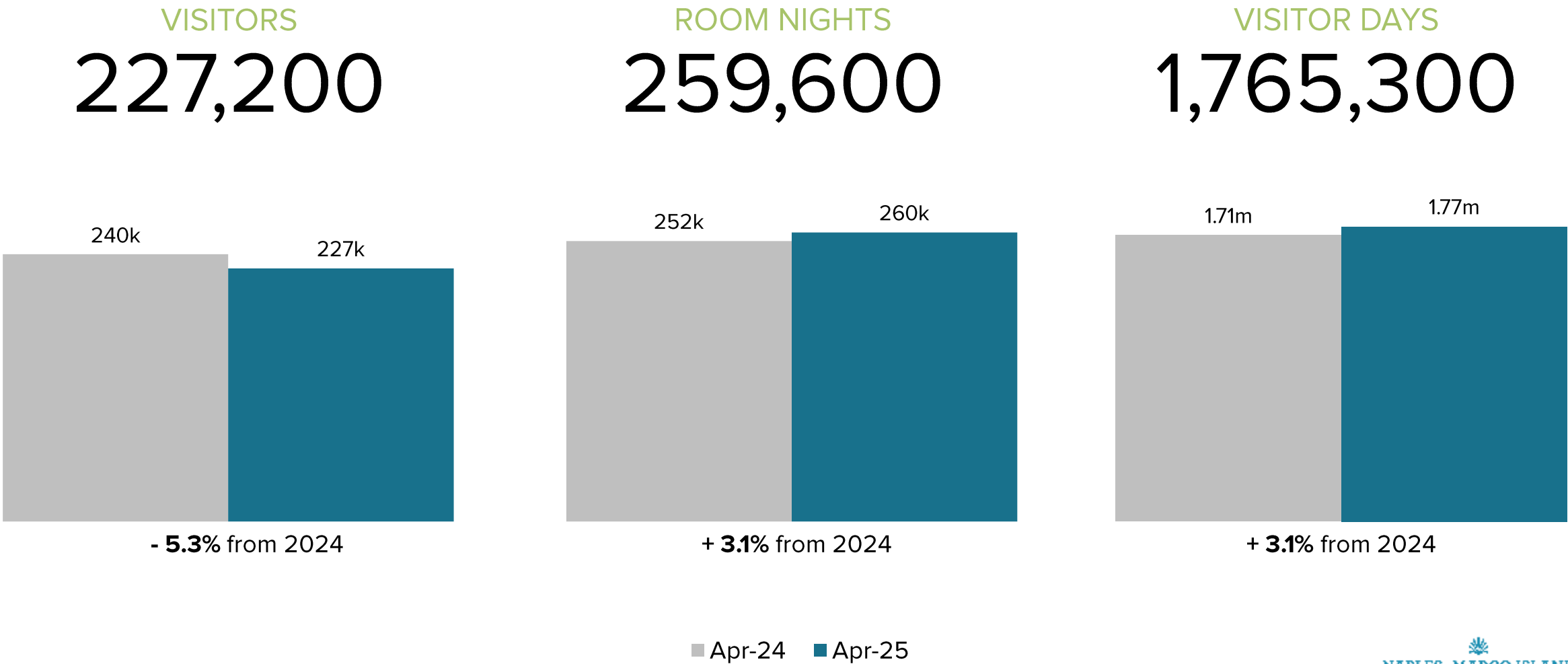
Disclaimer: This forecast is based on three-month forward-looking expectations provided by a sample of accommodation partners. Actual lodging performance has historically differed from these projections.

■ Apr-24 ■ Apr-25



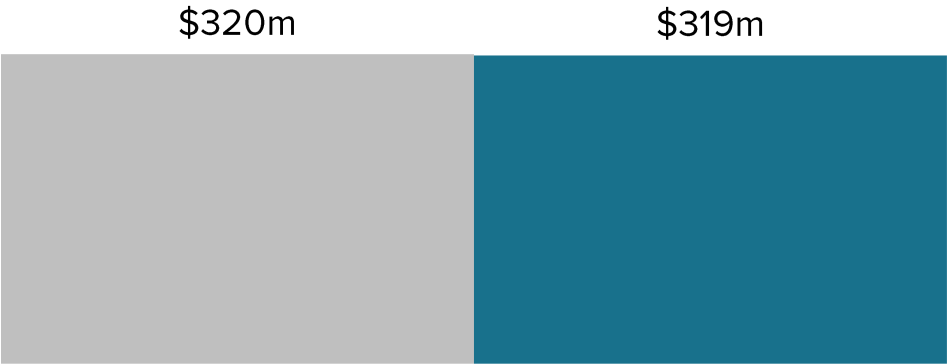
2

EXECUTIVE MONTHLY SUMMARY



DIRECT SPENDING

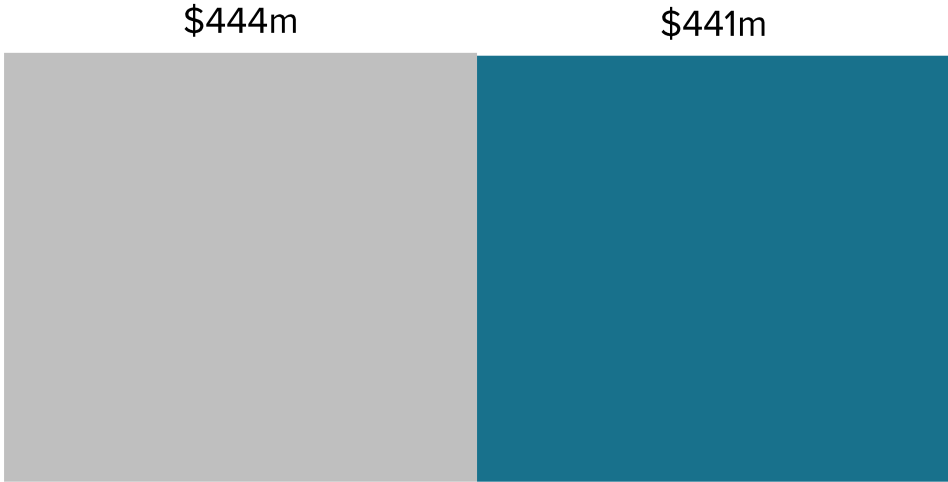
\$318,786,200



- 0.4% from 2024

ECONOMIC IMPACT

\$440,562,500



- 0.7% from 2024

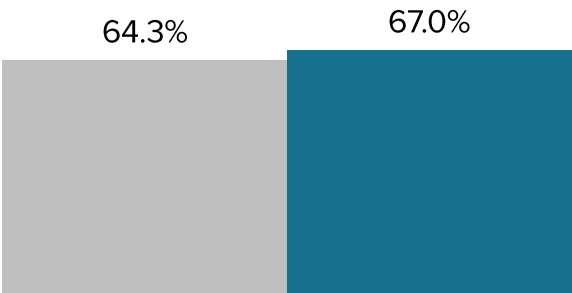
■ Apr-24 ■ Apr-25

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

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

OCCUPANCY RATE

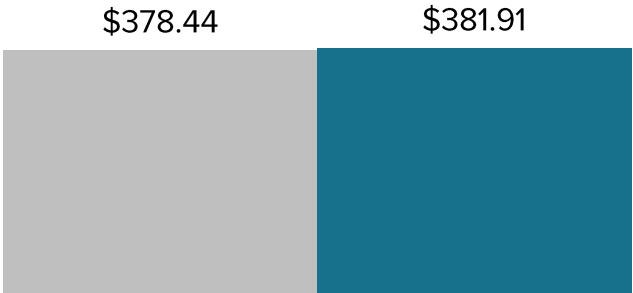
67.0%



+ **4.2%** from 2024

AVERAGE DAILY RATE

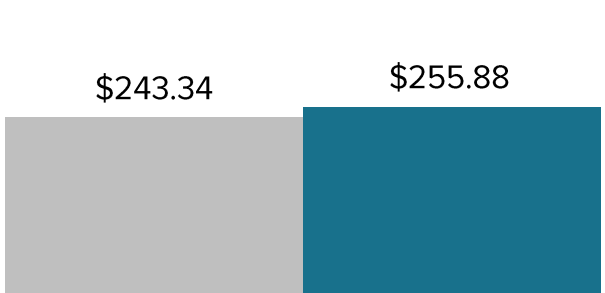
\$381.91



+ **0.9%** from 2024

REVENUE PER AVAILABLE ROOM

\$255.88



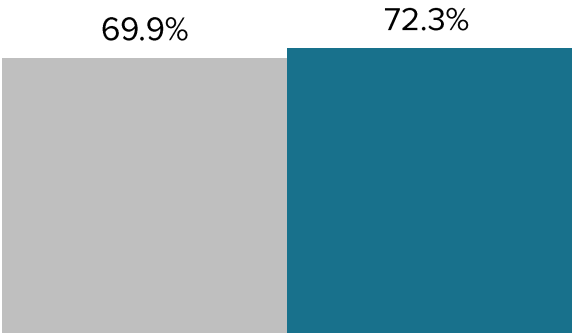
+ **5.2%** from 2024

■ Apr-24 ■ Apr-25

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

OCCUPANCY RATE

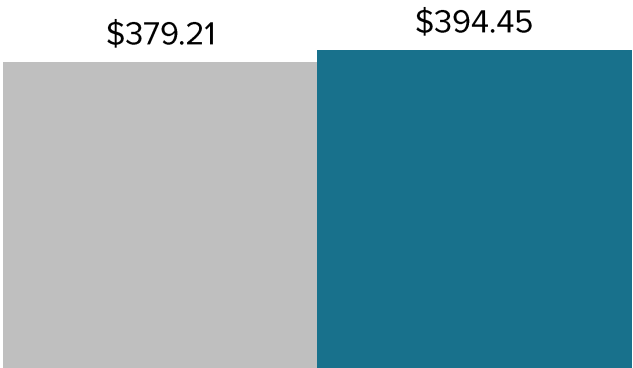
72.3%



+ 3.4% from 2024

AVERAGE DAILY RATE

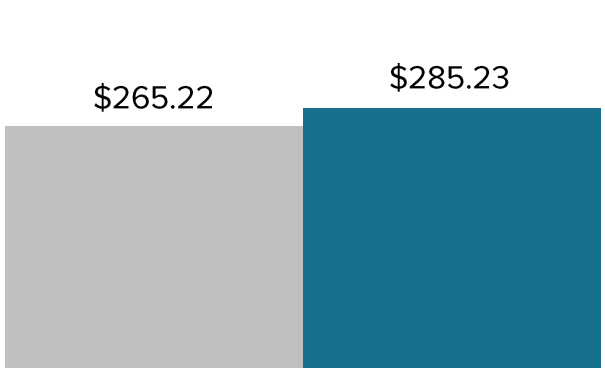
\$394.45



+ 4.0% from 2024

REVENUE PER AVAILABLE ROOM

\$285.23



+ 7.5% from 2024

¹Source: STR data

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

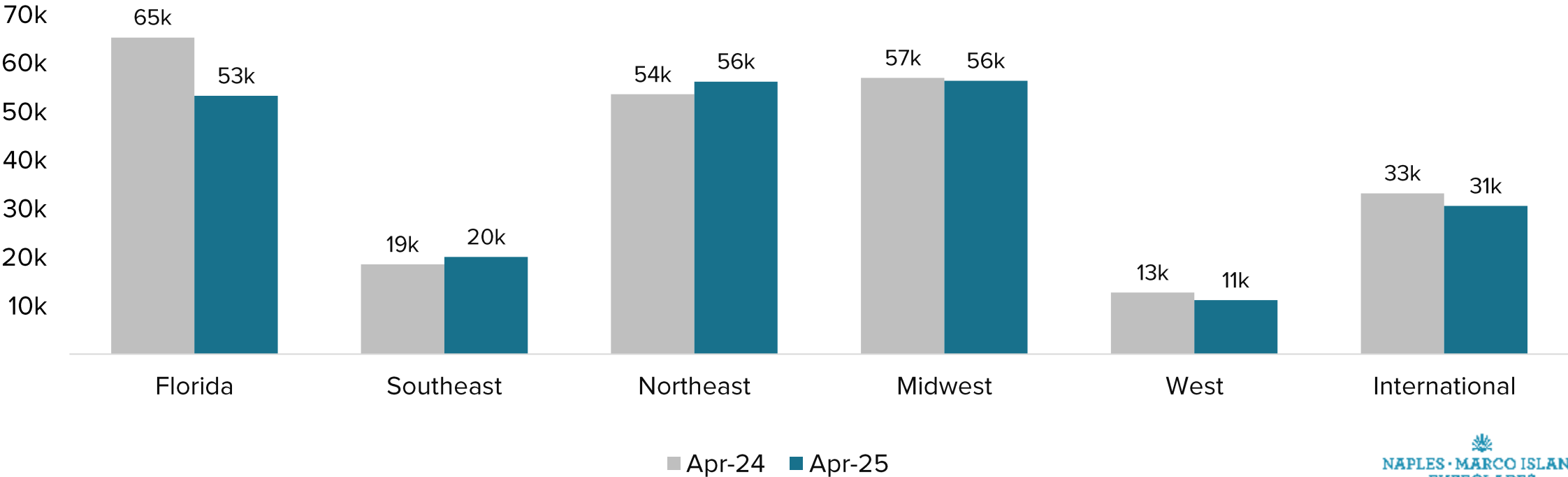
■ Apr-24 ■ Apr-25

FLORIDA VISITORS

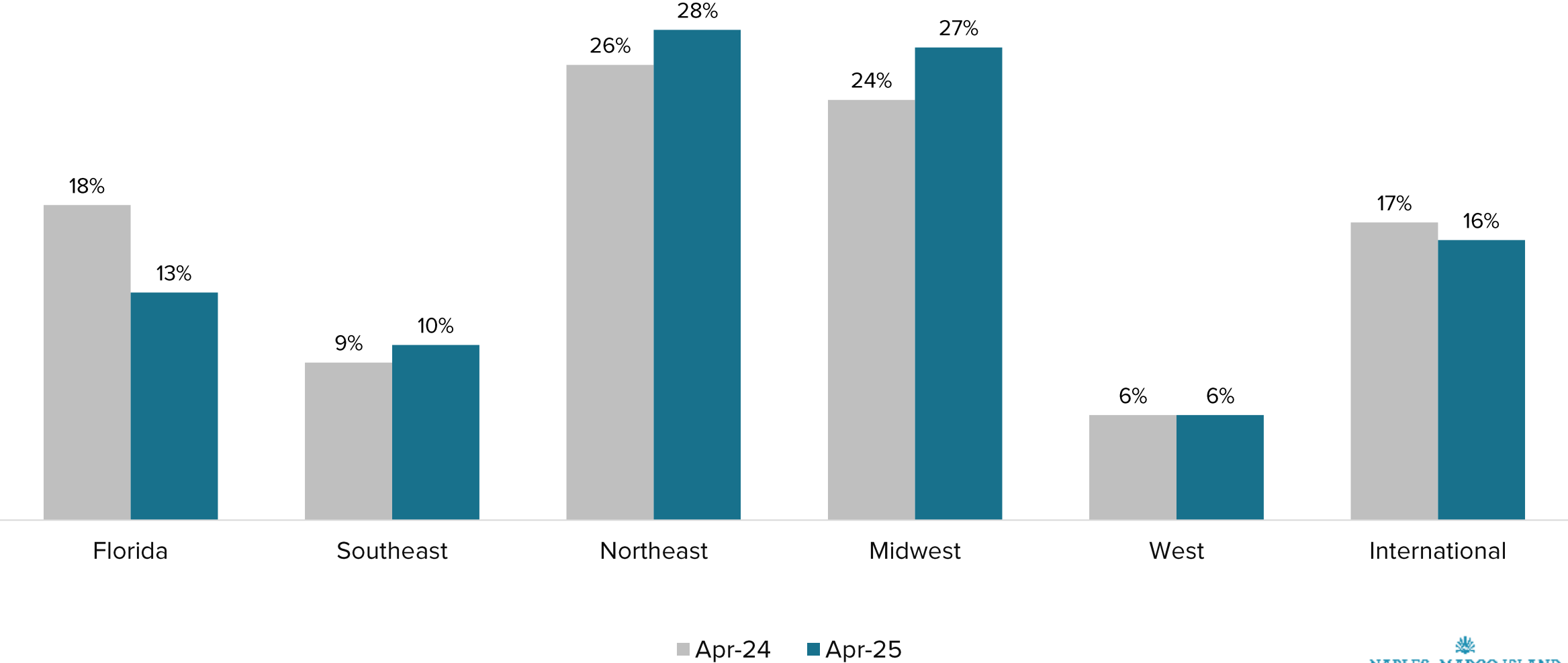
53,200

OUT-OF-STATE VISITORS

174,000



APRIL 2025 | OVERNIGHT VISITOR ORIGINS





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EXECUTIVE FISCAL YEAR-TO-DATE (FYTD) SUMMARY

FYTD VISITORS

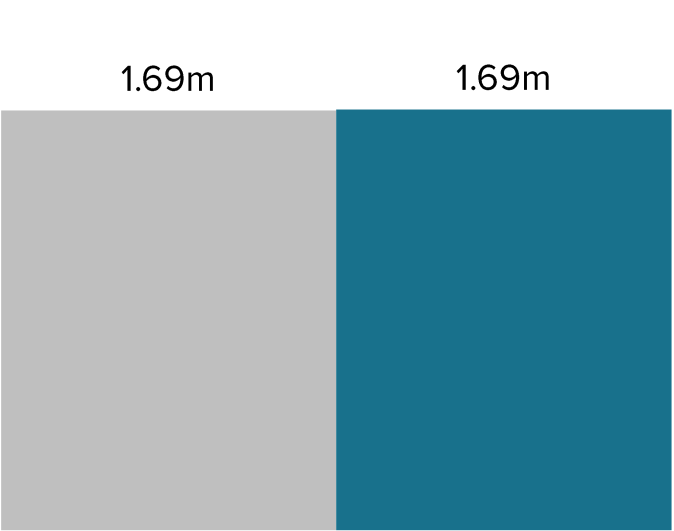
1,694,500

FYTD ROOM NIGHTS

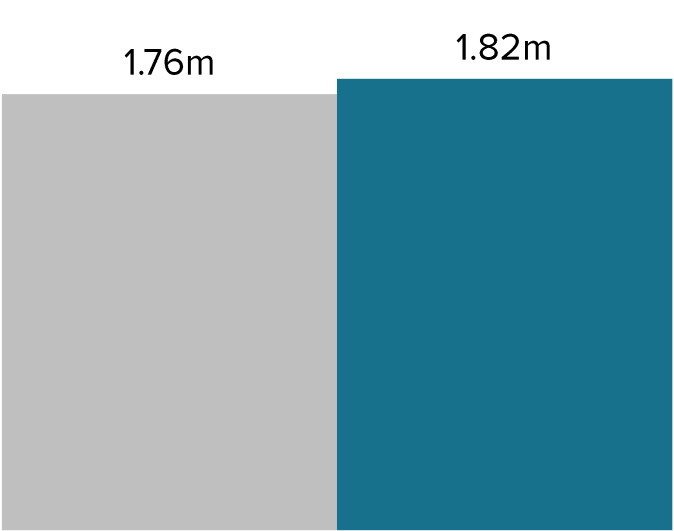
1,817,100

FYTD VISITOR DAYS

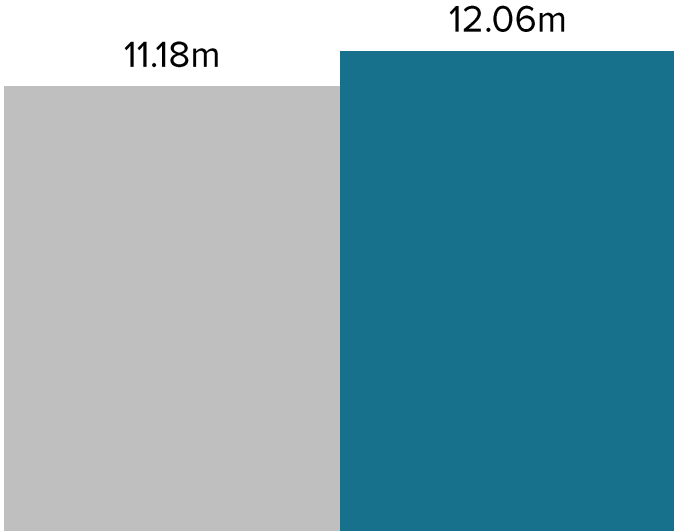
12,063,300



+ 0.3% from FYTD 24



+ 3.5% from FYTD 24



+ 7.9% from FYTD 24

■ FYTD 24 ■ FYTD 25

FYTD DIRECT SPENDING

\$2,005,361,900

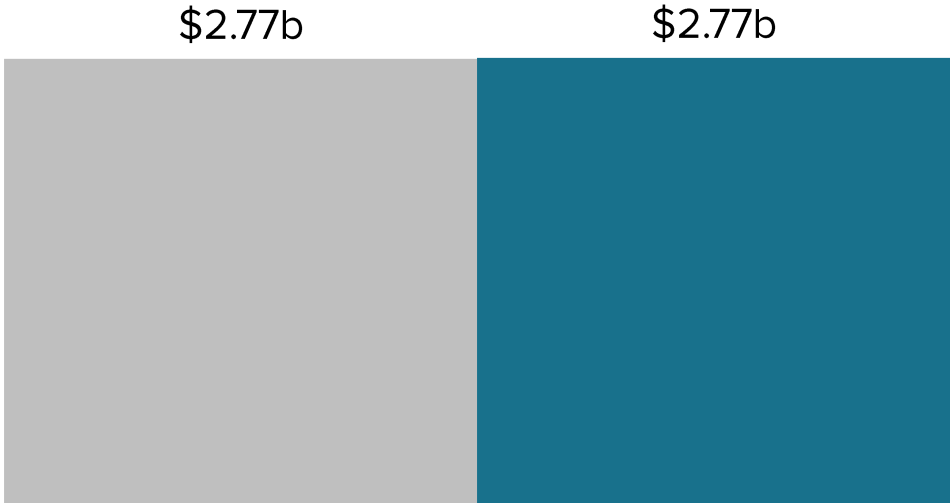
+ 0.5% from FYTD 24



FYTD ECONOMIC IMPACT

\$2,771,920,300

+ 0.2% from FYTD 24¹



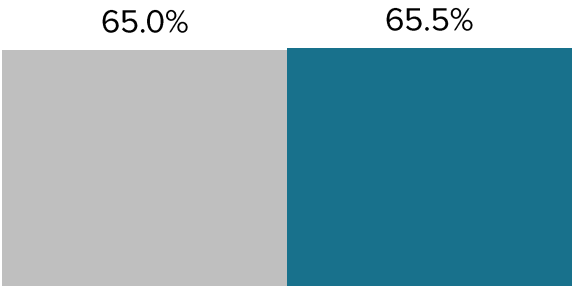
¹The IMPLAN multiplier for Collier County was 1.386 for 2024 and is 1.382 in 2025.

■ FYTD 24 ■ FYTD 25

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

OCCUPANCY RATE

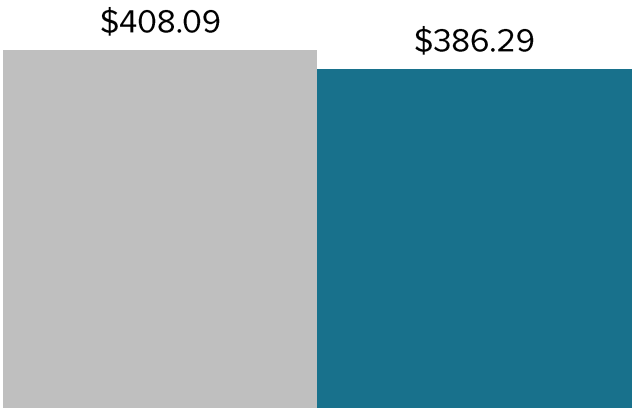
65.5%



+ 0.8% from FYTD 24

AVERAGE DAILY RATE

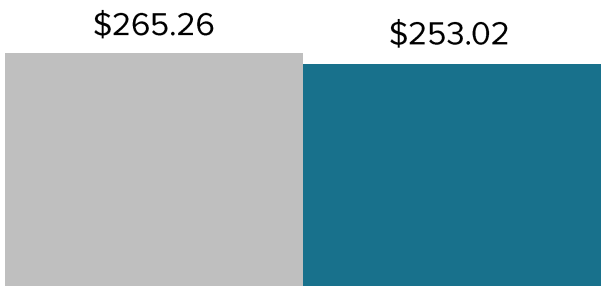
\$386.29



- 5.3% from FYTD 24

REVENUE PER AVAILABLE ROOM

\$253.02

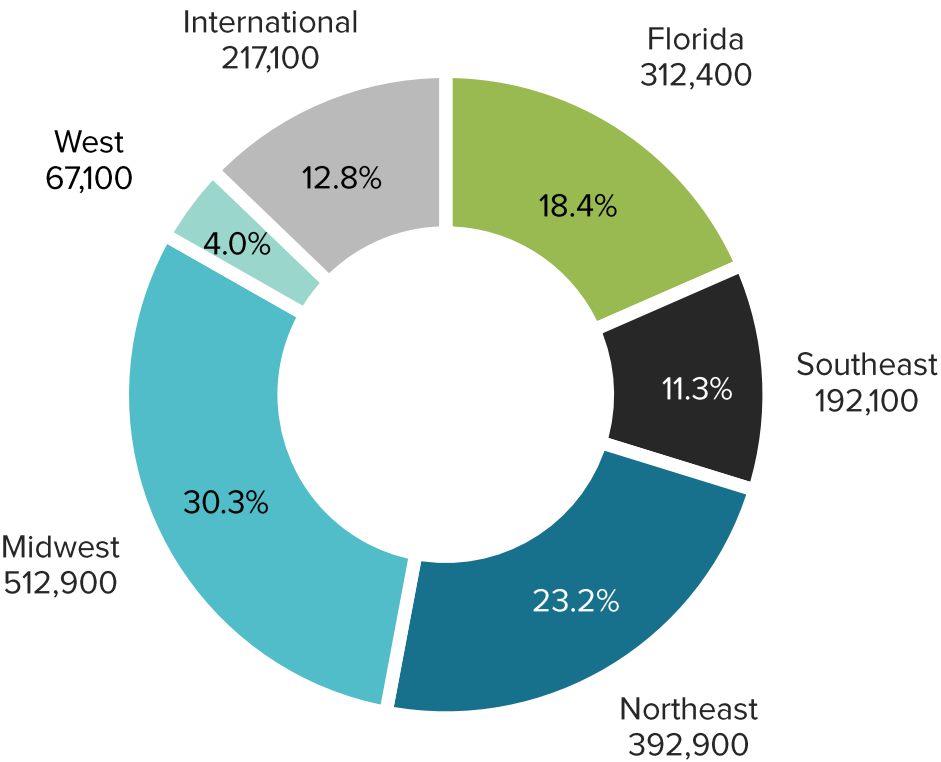


- 4.6% from FYTD 24

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

FYTD 2025 | VISITOR ORIGIN

Region	FYTD 2024		FYTD 2025		Percent Change (±Δ%)	
	# Visitors	% Share	# Visitors	% Share	# Visitors	% Share
Florida	344,400	20.4%	312,400	18.4%	- 9.3%	- 9.5%
Southeast	187,200	11.1%	192,100	11.3%	+ 2.6%	+ 2.3%
Northeast	379,900	22.5%	392,900	23.2%	+ 3.4%	+ 3.1%
Midwest	471,900	27.9%	512,900	30.3%	+ 8.7%	+ 8.4%
West	84,200	5.0%	67,100	4.0%	- 20.3%	- 20.5%
Canada	90,400	5.3%	92,000	5.4%	+ 1.8%	+ 1.5%
Europe	93,800	5.5%	87,100	5.1%	- 7.1%	- 7.4%
C/S America	18,500	1.2%	20,100	1.2%	+ 8.6%	+ 8.4%
Other	19,600	1.1%	17,900	1.1%	- 8.7%	- 8.9%
Total	1,689,900	100.0%	1,694,500	100.0%		





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MONTHLY
DESTINATION
COMPARISONS

DESTINATION COMPARISONS | SUPPLY

	Hotel Supply (Rooms)	Δ% in Supply from April 2024
	Total	Total
Miami	1,957,950	+ 0.5%
Ft. Lauderdale	1,183,830	+ 0.6%
Palm Beach	585,540	+ 1.3%
Ft. Myers	383,520	+ 10.3%
Sarasota	381,420	+ 3.3%
Florida Keys	319,740	+ 2.0%
St. Petersburg	318,180	- 7.1%
Clearwater	274,380	+ 0.5%
Naples	249,420	+ 7.7%

¹ Metrics provided by STR.

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

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

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

DESTINATION COMPARISONS | DEMAND

	Hotel Demand (Rooms)				Δ% in Demand from April 2024			
	Transient ²	Group ³	Contract ⁴	Total	Transient ²	Group ³	Contract ⁴	Total
Miami	1,185,025	301,863	88,069	1,574,958	+ 2.2%	+ 2.5%	+ 14.1%	+ 2.8%
Ft. Lauderdale	708,139	158,926	23,075	890,141	+ 2.0%	- 3.8%	- 10.8%	+ 0.6%
Palm Beach	317,468	108,261	8,654	434,383	+ 1.4%	+ 20.1%	- 11.1%	+ 5.2%
Sarasota	214,669	49,387	7,633	271,689	+ 6.0%	- 21.5%	+ 49.3%	+ 0.4%
Florida Keys	232,517	27,614	730	260,861	+ 6.7%	- 13.9%	+ 8.3%	+ 4.1%
Ft. Myers	186,365	38,856	21,579	246,800	+ 7.2%	+ 2.2%	+ 8.5%	+ 6.5%
St. Petersburg	189,266	43,825	2,354	235,445	- 3.9%	- 25.9%	+ 2.6%	- 8.9%
Clearwater	182,423	34,186	0	216,609	+ 9.0%	- 10.9%	-	+ 5.3%
Naples	141,450	38,378	527	180,355	+ 16.4%	- 3.3%	- 33.5%	+ 11.3%

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DESTINATION COMPARISONS | OCCUPANCY

	Hotel Occupancy (%)				Δ% in Occupancy from April 2024			
	Transient ²	Group ³	Contract ⁴	Total	Transient ²	Group ³	Contract ⁴	Total
Florida Keys	72.7%	8.6%	0.2%	81.6%	+ 4.6%	- 15.6%	+ 6.2%	+ 2.0%
Miami	60.5%	15.4%	4.5%	80.4%	+ 1.6%	+ 2.0%	+ 13.5%	+ 2.3%
Clearwater	66.5%	12.5%	0.0%	78.9%	+ 8.4%	- 11.4%	0.0%	+ 4.7%
Ft. Lauderdale	59.8%	13.4%	1.9%	75.2%	+ 1.4%	- 4.4%	- 11.4%	- 0.1%
Palm Beach	54.2%	18.5%	1.5%	74.2%	+ 0.1%	+ 18.5%	- 12.2%	+ 3.8%
St. Petersburg	59.5%	13.8%	0.7%	74.0%	+ 3.5%	- 20.2%	+ 10.5%	- 1.9%
Naples	56.7%	15.4%	0.2%	72.3%	+ 8.1%	- 10.2%	- 38.2%	+ 3.4%
Sarasota	56.3%	12.9%	2.0%	71.2%	+ 2.6%	- 24.0%	+ 44.6%	- 2.8%
Ft. Myers	48.6%	10.1%	5.6%	64.4%	- 2.8%	- 7.3%	-1.7%	- 3.4%

¹ Metrics provided by STR.

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DESTINATION COMPARISONS | REVENUE

	Hotel Revenue (Millions of Dollars)				Δ% in Revenue from April 2024			
	Transient ²	Group ³	Contract ⁴	Total	Transient ²	Group ³	Contract ⁴	Total
Miami	\$298.66	\$87.80	\$12.03	\$398.49	+ 8.6%	+ 8.5%	+ 19.5%	+ 8.8%
Ft. Lauderdale	\$142.57	\$36.56	\$3.70	\$182.83	+ 6.3%	- 7.7%	- 8.9%	+ 2.8%
Palm Beach	\$102.43	\$33.46	\$1.45	\$137.34	+ 20.3%	+ 16.7%	- 7.2%	+ 19.0%
Florida Keys	\$93.36	\$11.08	\$0.20	\$104.64	+ 6.3%	- 11.7%	- 15.0%	+ 4.0%
Naples	\$56.12	\$14.90	\$0.12	\$71.14	+ 21.1%	- 0.1%	- 35.1%	+ 15.8%
Sarasota	\$55.02	\$10.57	\$1.21	\$66.80	+ 16.8%	- 16.3%	+ 50.4%	+ 10.4%
Clearwater	\$48.59	\$7.28	\$0.00	\$55.87	+ 21.7%	- 9.5%	-	+ 16.5%
St. Petersburg	\$45.29	\$9.02	\$0.33	\$54.64	+ 1.5%	- 26.5%	+ 20.7%	- 4.4%
Ft. Myers	\$36.29	\$7.32	\$3.66	\$47.27	+ 19.2%	+ 2.5%	+ 27.0%	+ 16.8%

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DESTINATION COMPARISONS | DAILY RATE

	Hotel Average Daily Rate (\$)				Δ% in ADR from April 2024			
	Transient ²	Group ³	Contract ⁴	Total	Transient ²	Group ³	Contract ⁴	Total
Florida Keys	\$401.51	\$401.18	\$278.43	\$401.13	- 0.4%	+ 2.6%	- 21.6%	- 0.1%
Naples	\$396.75	\$388.17	\$235.63	\$394.45	+ 4.1%	+ 3.4%	- 2.4%	+ 4.0%
Palm Beach	\$322.65	\$309.05	\$167.05	\$316.16	+ 18.6%	- 2.8%	+ 4.4%	+ 13.2%
Clearwater	\$266.36	\$213.05	\$0.00	\$257.94	+ 11.7%	+ 1.6%	0.0%	+ 10.7%
Miami	\$252.03	\$290.88	\$136.56	\$253.02	+ 6.3%	+ 5.8%	+ 4.7%	+ 5.8%
Sarasota	\$256.31	\$213.94	\$158.57	\$245.86	+ 10.3%	+ 6.6%	+ 0.7%	+ 9.9%
St. Petersburg	\$239.30	\$205.81	\$141.83	\$232.09	+ 5.6%	- 0.8%	+ 17.6%	+ 4.9%
Ft. Lauderdale	\$201.34	\$230.06	\$160.21	\$205.40	+ 4.2%	- 4.1%	+ 2.2%	+ 2.2%
Ft. Myers	\$194.73	\$188.44	\$169.52	\$191.54	+ 11.2%	+ 0.2%	+ 17.1%	+ 9.7%

¹ Metrics provided by STR.

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

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

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DESTINATION COMPARISONS | REVPAR

	Hotel Revenue Per Available Room (\$)				Δ% in RevPAR from April 2024			
	Transient ²	Group ³	Contract ⁴	Total	Transient ²	Group ³	Contract ⁴	Total
Florida Keys	\$291.98	\$34.65	\$0.64	\$327.27	+ 4.2%	- 13.4%	- 16.7%	+ 2.0%
Naples	\$225.00	\$59.73	\$0.50	\$285.23	+ 12.5%	- 7.2%	- 39.7%	+ 7.5%
Palm Beach	\$174.93	\$57.14	\$2.47	\$234.54	+ 18.8%	+ 15.2%	- 8.4%	+ 17.5%
Clearwater	\$177.09	\$26.54	\$0.00	\$203.63	+ 21.1%	- 9.9%	0.0%	+ 15.9%
Miami	\$152.54	\$44.85	\$6.14	\$203.53	+ 8.0%	+ 7.9%	+ 18.8%	+ 8.3%
Sarasota	\$144.25	\$27.70	\$3.17	\$175.13	+ 13.2%	- 18.9%	+ 45.6%	+ 6.9%
St. Petersburg	\$142.34	\$28.35	\$1.05	\$171.74	+ 9.3%	- 20.9%	+ 30.0%	+ 2.9%
Ft. Lauderdale	\$120.43	\$30.88	\$3.12	\$154.44	+ 5.6%	- 8.3%	- 9.4%	+ 2.2%
Ft. Myers	\$94.63	\$19.09	\$9.54	\$123.26	+ 8.1%	- 7.1%	+ 15.2%	+ 5.9%

¹ Metrics provided by STR.

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4b

FISCAL YTD
DESTINATION
COMPARISONS

DESTINATION COMPARISONS | SUPPLY

	Hotel Supply (Rooms)	%Δ in Supply from FYTD 2024
	Total	Total
Miami	13,805,842	- 0.1%
Ft. Lauderdale	8,325,668	+ 0.4%
Palm Beach	4,112,533	+ 0.9%
Sarasota	2,646,884	+ 1.1%
Ft. Myers	2,585,357	+ 7.1%
Florida Keys	2,259,220	+ 1.3%
St. Petersburg	2,204,674	- 8.9%
Clearwater	1,916,981	- 0.8%
Naples	1,774,136	+ 12.5%

¹ Metrics provided by STR.

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DESTINATION COMPARISONS | DEMAND

	Hotel Demand (Rooms)				%Δ in Demand from FYTD 2024			
	Transient ²	Group ³	Contract ⁴	Total	Transient ²	Group ³	Contract ⁴	Total
Miami	8,233,353	1,884,636	649,110	10,767,099	- 0.4%	+ 4.8%	+ 11.8%	+ 1.1%
Ft. Lauderdale	4,983,359	1,076,350	171,701	6,231,410	- 0.2%	+ 0.4%	- 21.4%	- 0.8%
Palm Beach	2,299,513	763,881	66,891	3,130,285	+ 2.9%	+ 26.4%	- 9.8%	+ 7.5%
Sarasota	1,548,230	391,894	60,782	2,000,906	+ 8.9%	+ 6.5%	+ 20.6%	+ 8.7%
Ft. Myers	1,318,208	317,800	139,587	1,775,595	+ 6.3%	+ 4.7%	- 0.5%	+ 5.4%
St. Petersburg	1,261,436	426,334	34,167	1,721,937	+ 2.0%	+ 8.8%	+ 105.6%	+ 4.7%
Florida Keys	1,486,608	200,127	9,669	1,696,404	+ 0.6%	- 10.1%	+ 113.9%	- 0.5%
Clearwater	1,117,847	402,088	186	1,520,121	+ 9.2%	+ 26.6%	- 1.8%	+ 13.3%
Naples	885,548	339,278	844	1,225,668	+ 14.6%	+ 6.2%	- 67.5%	+ 12.0%

¹ Metrics provided by STR.

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

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

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

DESTINATION COMPARISONS | OCCUPANCY

	Hotel Occupancy (%)				%Δ in Occupancy from FYTD 2024			
	Transient ²	Group ³	Contract ⁴	Total	Transient ²	Group ³	Contract ⁴	Total
Clearwater	58.3%	21.0%	0.0%	79.3%	+ 10.0%	+ 27.6%	- 1.0%	+ 14.2%
St. Petersburg	57.2%	19.3%	1.5%	78.1%	+ 12.1%	+ 19.5%	+ 125.8%	+ 15.0%
Miami	59.6%	13.7%	4.7%	78.0%	- 0.4%	+ 4.9%	+ 11.9%	+ 1.2%
Palm Beach	55.9%	18.6%	1.6%	76.1%	+ 2.0%	+ 25.3%	- 10.6%	+ 6.5%
Sarasota	58.5%	14.8%	2.3%	75.6%	+ 7.7%	+ 5.4%	+ 19.3%	+ 7.5%
Florida Keys	65.8%	8.9%	0.4%	75.1%	- 0.6%	- 11.3%	+ 111.2%	- 1.7%
Ft. Lauderdale	59.9%	12.9%	2.1%	74.8%	- 0.6%	0.0%	- 21.7%	- 1.2%
Naples	49.9%	19.1%	0.0%	69.1%	+ 1.9%	- 5.6%	- 71.1%	- 0.4%
Ft. Myers	51.0%	12.3%	5.4%	68.7%	- 0.8%	- 2.3%	- 7.1%	- 1.6%

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DESTINATION COMPARISONS | REVENUE

	Hotel Revenue (Millions of Dollars)				%Δ in Revenue from FYTD 2024			
	Transient ²	Group ³	Contract ⁴	Total	Transient ²	Group ³	Contract ⁴	Total
Miami	\$2,127.59	\$538.53	\$88.98	\$2,755.11	+ 2.4%	+ 10.5%	+ 21.4%	+ 4.4%
Ft. Lauderdale	\$995.44	\$254.39	\$26.67	\$1,276.50	+ 0.5%	+ 1.3%	- 14.7%	+ 0.3%
Palm Beach	\$728.06	\$228.75	\$10.02	\$966.83	+ 11.0%	+ 23.6%	- 2.6%	+ 13.6%
Florida Keys	\$587.90	\$75.39	\$5.05	\$668.34	- 1.7%	- 9.0%	+ 144.8%	- 2.1%
Naples	\$341.14	\$117.58	\$0.21	\$458.93	+ 8.8%	+ 9.7%	- 66.2%	+ 8.9%
Sarasota	\$354.50	\$84.52	\$10.30	\$449.33	+ 11.6%	+ 18.1%	+ 53.0%	+ 13.5%
St. Petersburg	\$261.77	\$79.34	\$4.38	\$345.50	+ 1.5%	+ 10.3%	+ 159.9%	+ 4.2%
Ft. Myers	\$248.84	\$61.13	\$23.52	\$333.49	+ 6.8%	+ 1.0%	+ 6.9%	+ 5.7%
Clearwater	\$247.76	\$82.58	\$0.00	\$330.34	+ 12.1%	+ 34.4%	- 11.7%	+ 16.9%

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DESTINATION COMPARISONS | DAILY RATE

	Hotel Average Daily Rate (\$)				%Δ in ADR from FYTD 2024			
	Transient ²	Group ³	Contract ⁴	Total	Transient ²	Group ³	Contract ⁴	Total
Florida Keys	\$395.46	\$376.72	\$522.13	\$393.97	- 2.3%	+ 1.3%	+ 14.4%	- 1.7%
Naples	\$385.23	\$346.57	\$243.67	\$374.43	- 5.1%	+ 3.3%	+ 4.0%	- 2.7%
Palm Beach	\$316.61	\$299.46	\$149.81	\$308.86	+ 7.9%	- 2.3%	+ 8.1%	+ 5.7%
Miami	\$258.41	\$285.75	\$137.09	\$255.88	+ 2.8%	+ 5.4%	+ 8.5%	+ 3.2%
Sarasota	\$228.97	\$215.68	\$169.48	\$224.56	+ 2.5%	+ 10.8%	+ 26.9%	+ 4.4%
Clearwater	\$221.64	\$205.38	\$6.69	\$217.31	+ 2.6%	+ 6.1%	- 10.1%	+ 3.2%
Ft. Lauderdale	\$199.75	\$236.35	\$155.33	\$204.85	+ 0.6%	+ 1.0%	+ 8.5%	+ 1.1%
St. Petersburg	\$207.52	\$186.10	\$128.29	\$200.65	- 0.5%	+ 1.3%	+ 26.4%	- 0.5%
Ft. Myers	\$188.77	\$192.35	\$168.50	\$187.82	+ 0.5%	- 3.5%	+ 7.5%	+ 0.3%

¹ Metrics provided by STR.

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DESTINATION COMPARISONS | REVPAR

	Hotel Revenue Per Available Room (\$)				%Δ in RevPAR from FYTD 2024			
	Transient ²	Group ³	Contract ⁴	Total	Transient ²	Group ³	Contract ⁴	Total
Florida Keys	\$260.22	\$33.37	\$2.23	\$295.83	- 2.9%	- 10.1%	+ 141.7%	- 3.4%
Naples	\$192.29	\$66.28	\$0.12	\$258.68	- 3.3%	- 2.5%	- 70.0%	- 3.1%
Palm Beach	\$177.03	\$55.62	\$2.44	\$235.09	+ 10.1%	+ 22.5%	- 3.4%	+ 12.6%
Miami	\$154.11	\$39.01	\$6.45	\$199.56	+ 2.4%	+ 10.6%	+ 21.5%	+ 4.5%
Clearwater	\$129.25	\$43.08	\$0.00	\$172.32	+ 12.9%	+ 35.4%	- 11.0%	+ 17.8%
Sarasota	\$133.93	\$31.93	\$3.89	\$169.76	+ 10.4%	+ 16.8%	+ 51.3%	+ 12.2%
St. Petersburg	\$118.74	\$35.99	\$1.99	\$156.71	+ 11.5%	+ 21.1%	+ 185.4%	+ 14.5%
Ft. Lauderdale	\$119.56	\$30.55	\$3.20	\$153.32	0.0%	+ 0.9%	- 15.0%	- 0.2%
Ft. Myers	\$96.25	\$23.64	\$9.10	\$128.99	- 0.3%	- 5.7%	- 0.2%	- 1.3%

¹ Metrics provided by STR.

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

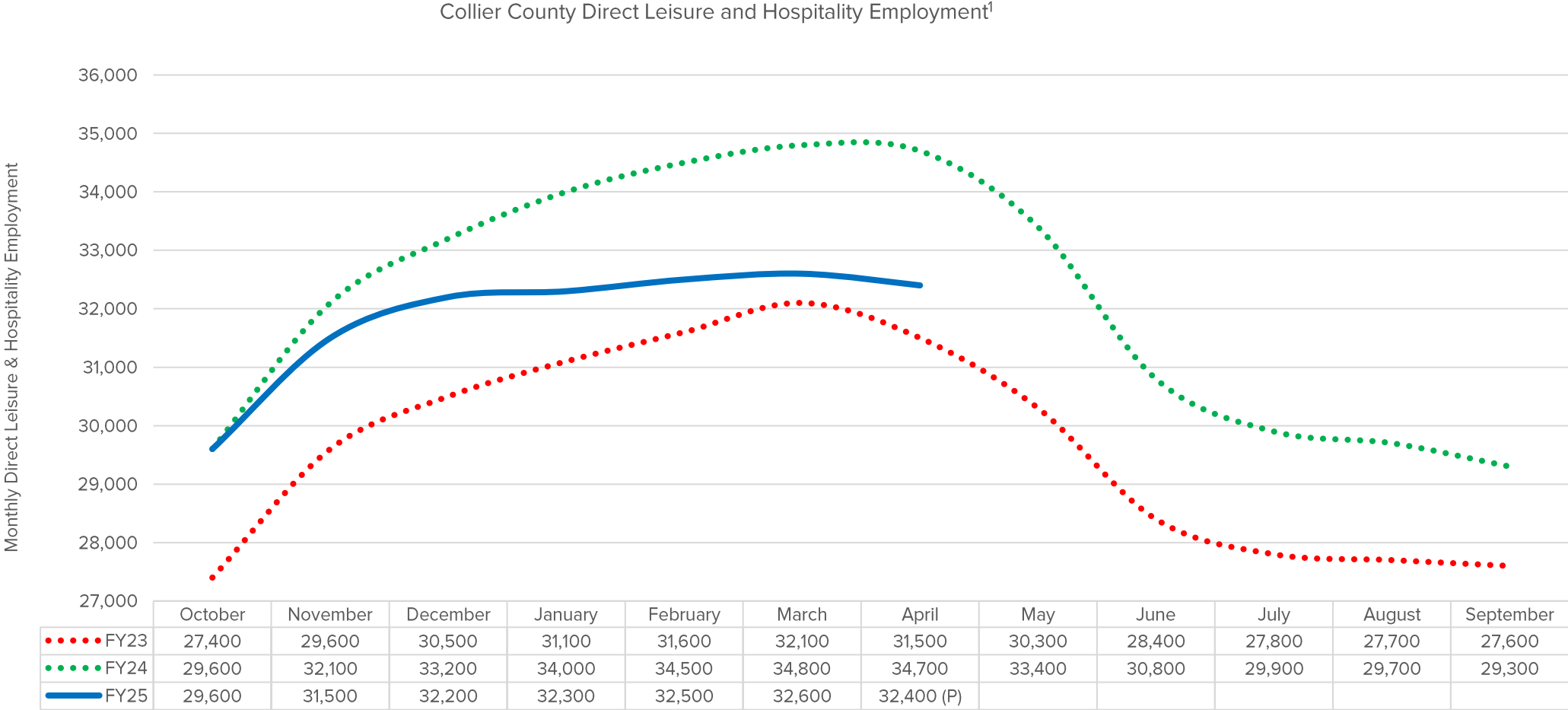
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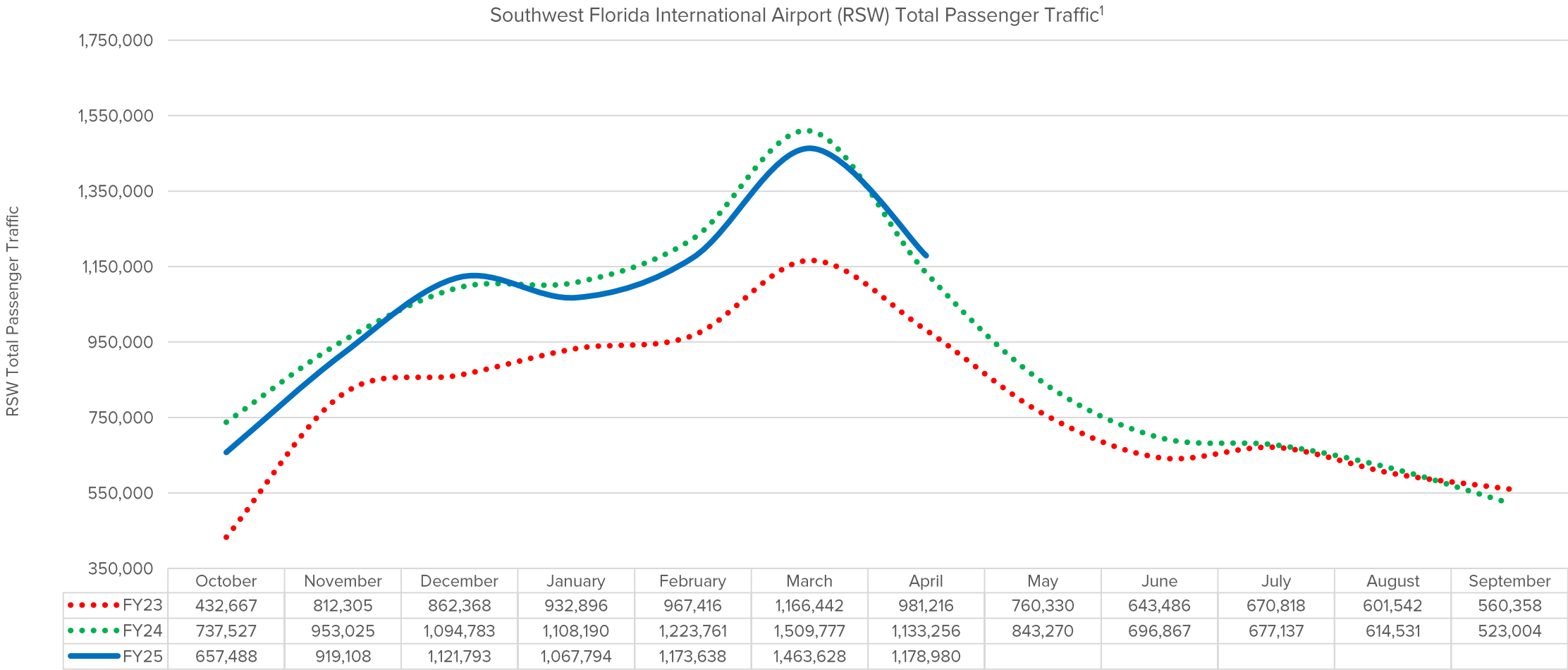


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INDUSTRY
DATA

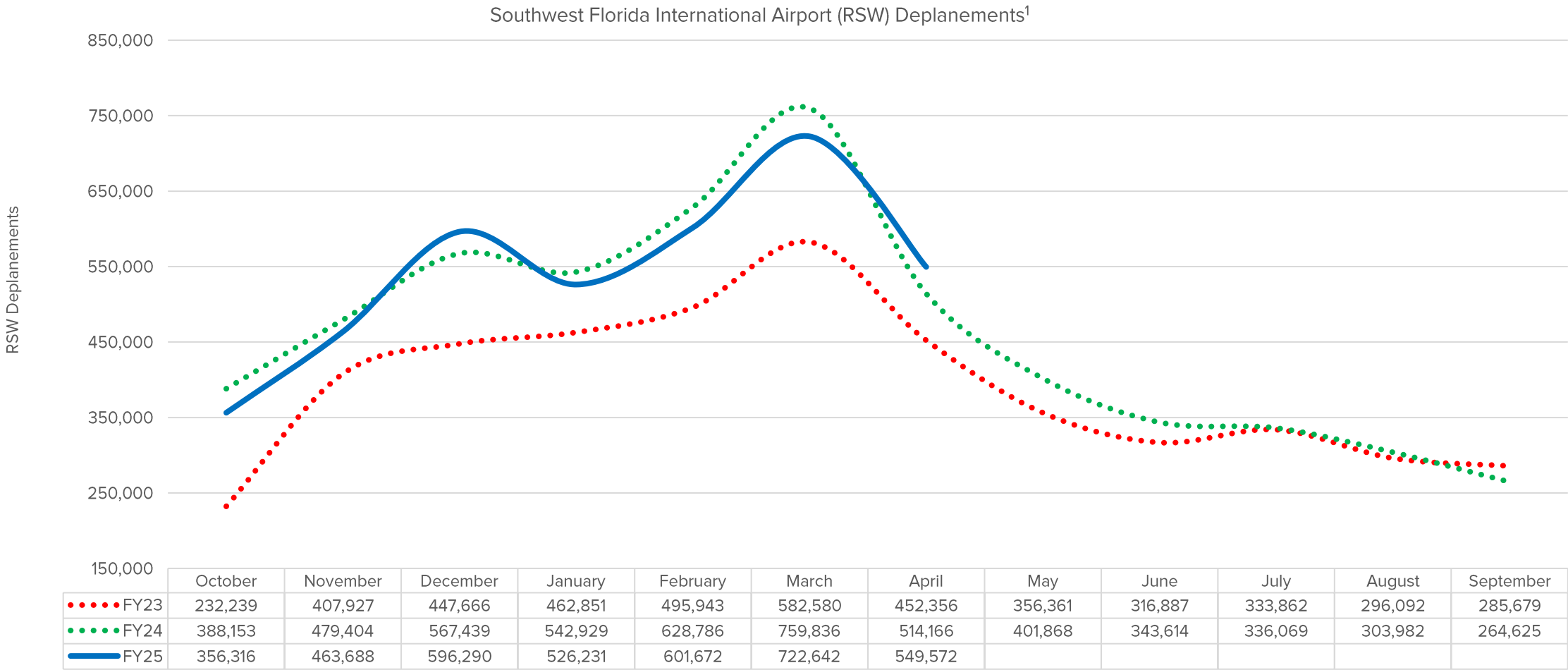


¹SOURCE: Current Employment Statistic Program (CES), Collier County Leisure and Hospitality Sector, not seasonally adjusted.
(P) Preliminary.



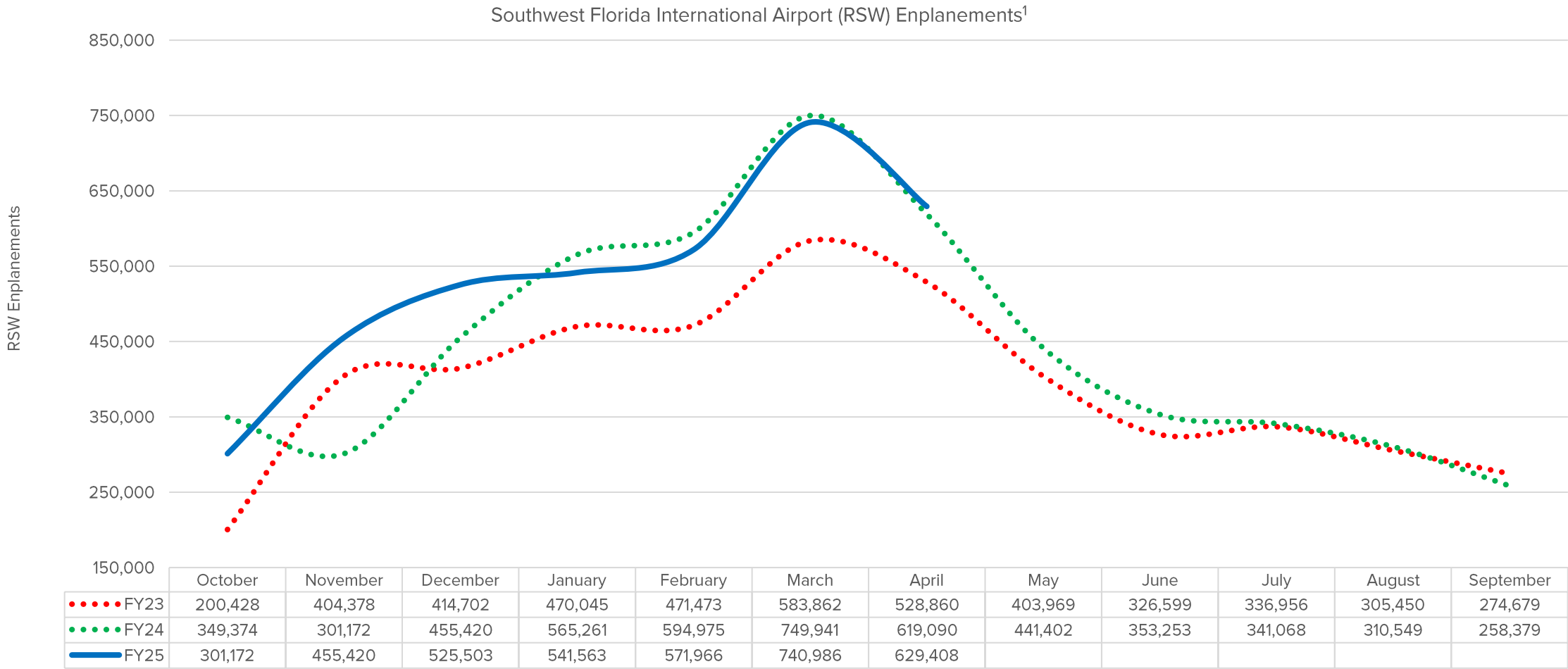
¹SOURCE: Lee County Port Authority Monthly Statistics.

INDUSTRY DATA | RSW INFLOW (DEPLANEMENTS)



¹SOURCE: Lee County Port Authority Monthly Statistics.

INDUSTRY DATA | RSW OUTFLOW (ENPLANEMENTS)



¹SOURCE: Lee County Port Authority Monthly Statistics.

INDUSTRY DATA | LICENSED RENTAL UNITS

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

¹SOURCE: Florida Department of Business & Professional Regulation.

Questions?

Contact Info:

Naples, Marco Island, Everglades CVB

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

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

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

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

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

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



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

THANK YOU