



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

FLORIDA'S PARADISE COAST

FEBRUARY 2026 MONTHLY VISITOR DASHBOARD



## TABLE OF CONTENTS

1. Monthly Highlights: pgs. 3-7
2. Monthly Executive Summary: pgs. 8-14
3. Monthly Destination Comparisons: pgs. 15-21
4. Industry Data: pgs. 22-28



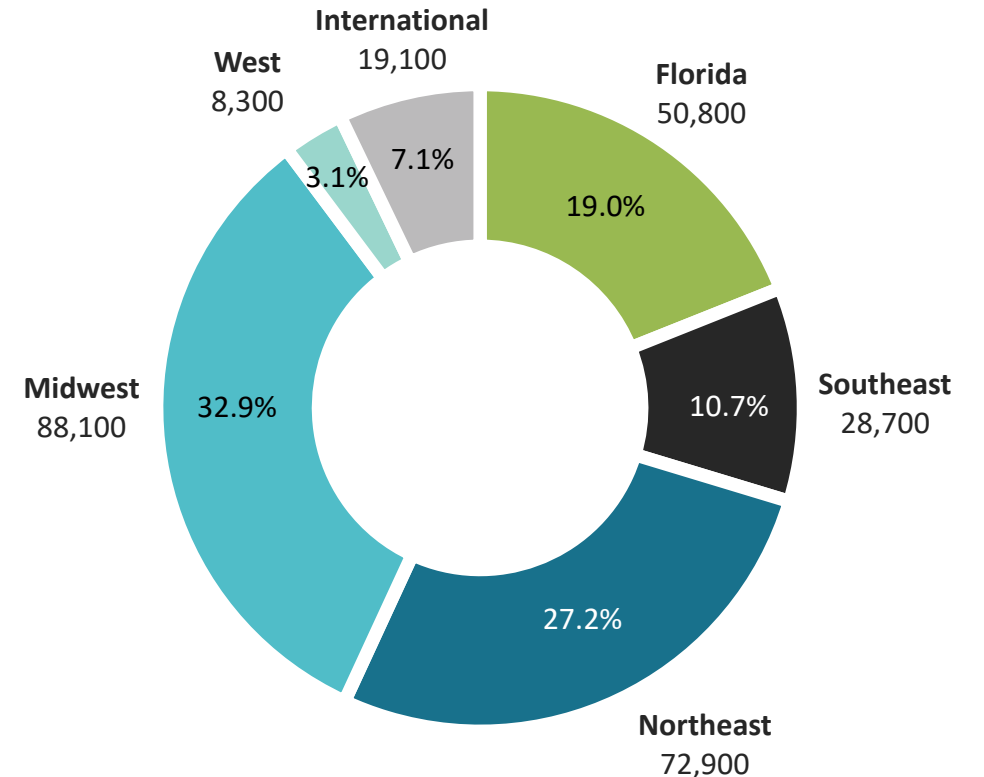
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MONTHLY  
HIGHLIGHTS

Tourism Metrics	February 2025	February 2026	Percent Change
Visitors	261,200	267,900	+ 2.6%
Visitor Days	1,854,500	1,982,500	+ 6.9%
Direct Spending	\$308,455,400	\$332,668,300	+ 7.8%
Room Nights	278,900	297,200	+ 6.6%
Occupancy	76.6%	78.6%	+ 2.6%
Average Daily Rate	\$450.49	\$474.76	+ 5.4%
RevPAR	\$345.08	\$373.16	+ 8.1%

# FEBRUARY 2026 | VISITOR ORIGIN REGIONS

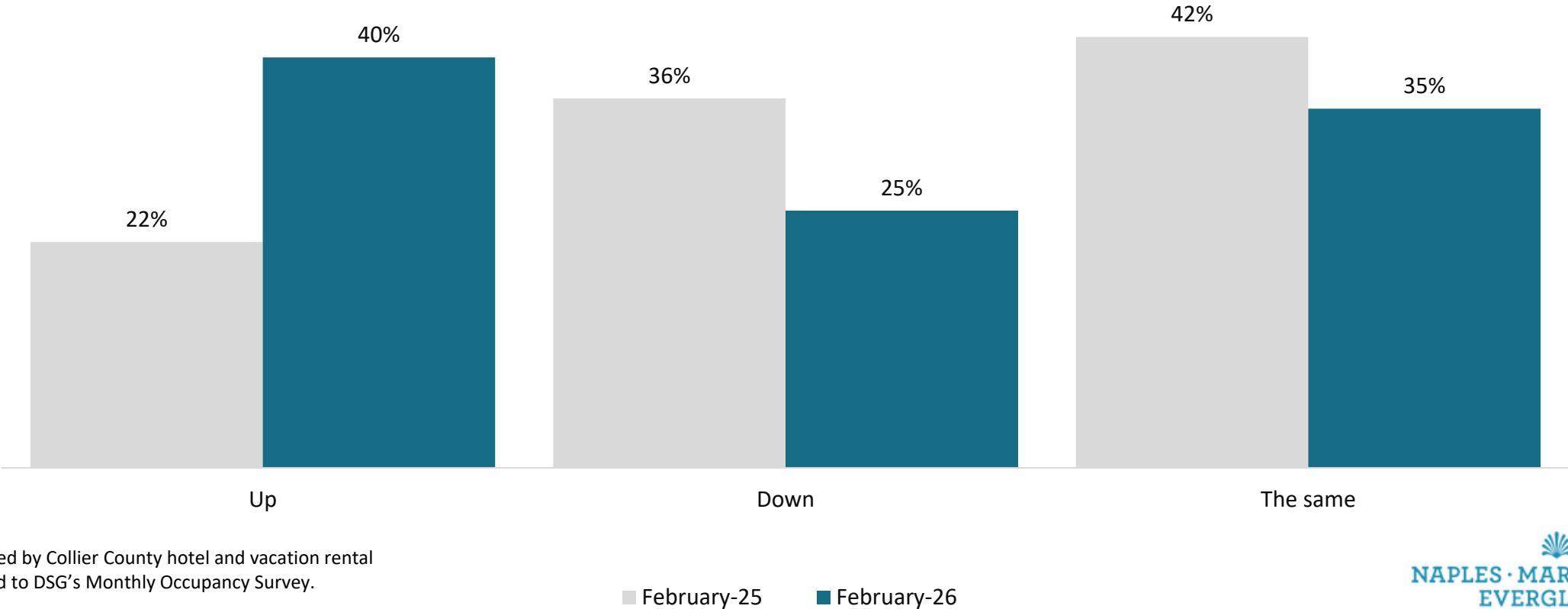
Region	February 2025		February 2026		Percent Change ( $\pm\Delta\%$ )	
	# Visitors	% Share	# Visitors	% Share	# Visitors	% Share
<b>Domestic</b>	240,100	91.9%	248,800	92.9%	+ 3.6%	+ 1.1%
Florida	42,600	16.3%	50,800	19.0%	+ 19.2%	+ 16.5%
Southeast	29,200	11.2%	28,700	10.7%	- 1.7%	- 4.3%
Northeast	71,600	27.4%	72,900	27.2%	+ 1.8%	- 0.8%
Midwest	89,100	34.1%	88,100	32.9%	- 1.1%	- 3.6%
West	7,600	2.9%	8,300	3.1%	+ 9.2%	+ 6.5%
<b>International</b>	21,100	8.1%	19,100	7.1%	- 9.5%	- 12.1%
Canada	10,700	4.1%	8,800	3.3%	- 17.8%	- 19.4%
Europe	8,100	3.1%	7,800	2.9%	- 3.7%	- 6.5%
C/S America	1,300	0.5%	1,400	0.5%	+ 7.7%	+ 0.5%
Other	1,000	0.4%	1,100	0.4%	+ 10.0%	+ 4.5%
<b>Total</b>	<b>261,200</b>	<b>100.0%</b>	<b>267,900</b>	<b>100.0%</b>	<b>+ 2.6%</b>	



## Highlights

- Visitation was 268K, an increase of 2.6% from February 2025.
- Direct Spending by Visitors was \$333M, an increase of 7.8% from February 2025.
- Collier County Hotel Industry Trends in February 2026:
  - Leisure Demand increased 1.9% year-over-year.
  - Group Demand increased 11.9% year-over-year.
  - Hotel Average Daily Rate (ADR) was \$487.60, a 5.0% increase year-over-year.
  - Hotel Occupancy was 80.5%, a 3.4% increase year-over-year.
  - Hotel Room Supply increased 1.5% year-over-year.
- Domestic Visitation in February 2026 increased 3.6% year-over-year.
  - In-State Visitation increased the most, up 19.2% year-over-year.
- International Visitation in February 2026 was down 9.5% year-over-year.
  - Canadian Visitation decreased the most, down 17.8% year-over-year.

“Looking ahead to the next three months, are your property’s reservations generally 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.

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.

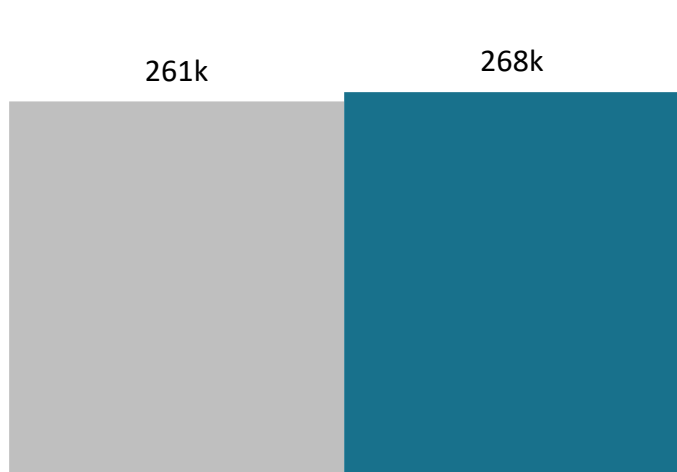


# 2

## EXECUTIVE MONTHLY SUMMARY

## VISITORS

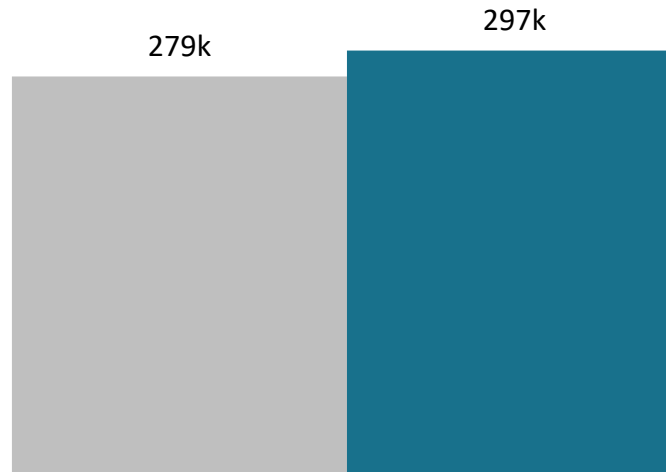
# 267,900



+ 2.6% from 2025

## ROOM NIGHTS

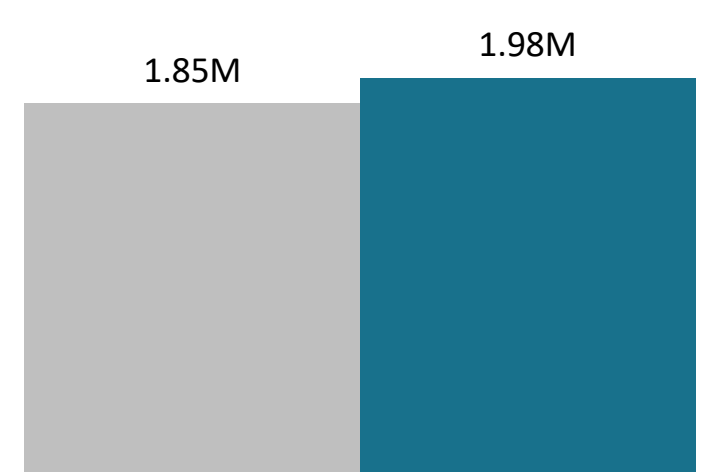
# 297,200



+ 6.6% from 2025

## VISITOR DAYS

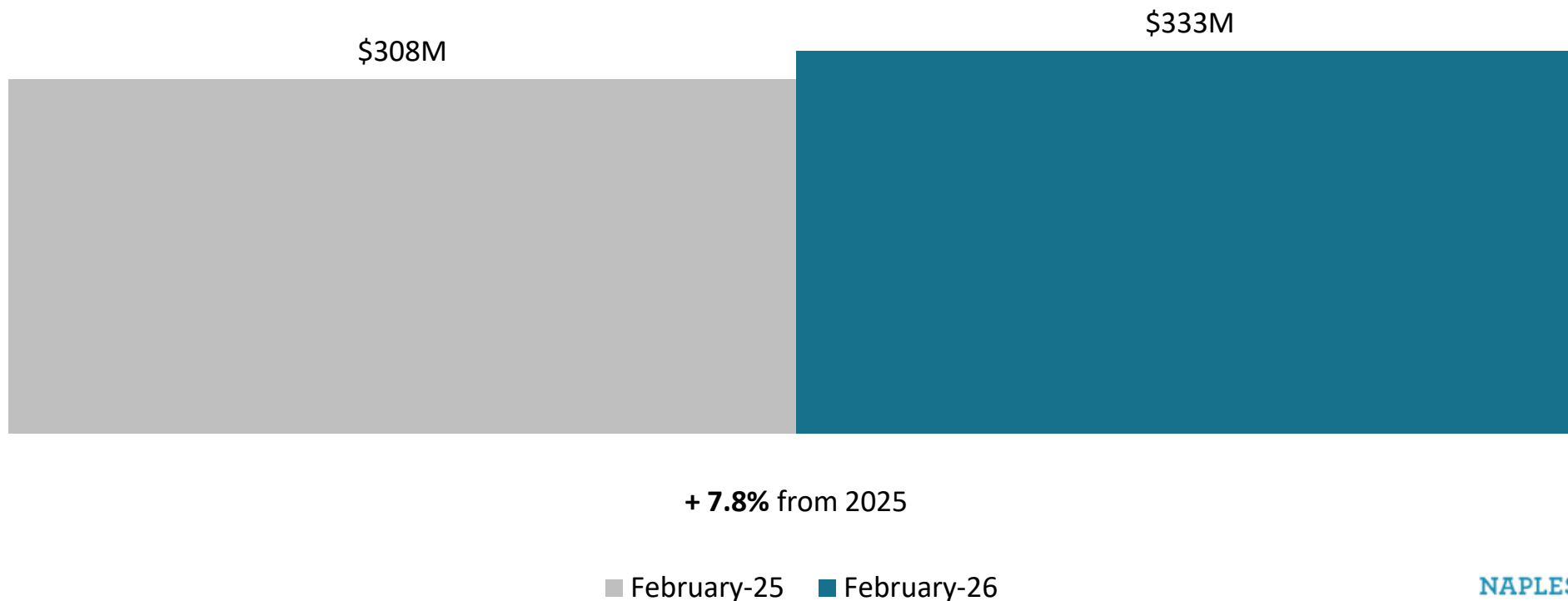
# 1,982,500



+ 6.9% from 2025

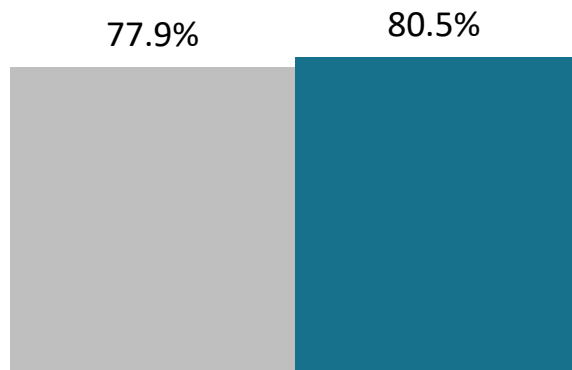
■ February-25 ■ February-26

DIRECT SPENDING  
**\$332,668,300**



## OCCUPANCY RATE

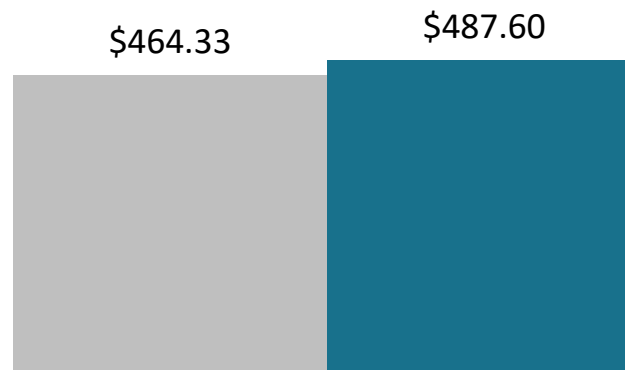
# 80.5%



+ 3.4% from 2025

## AVERAGE DAILY RATE

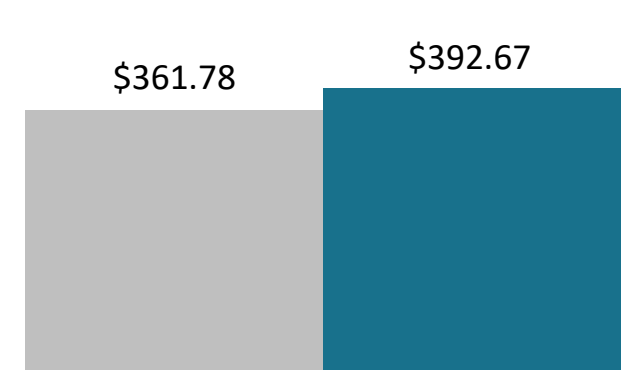
# \$487.60



+ 5.0% from 2025

## REVENUE PER AVAILABLE ROOM

# \$392.67



+ 8.5% from 2025

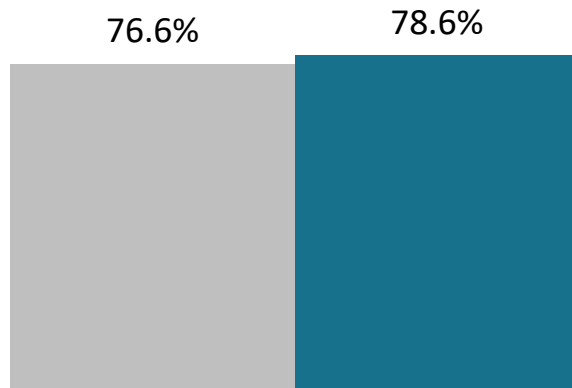
<sup>1</sup> Source: STR data

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

■ February-25 ■ February-26

## OCCUPANCY RATE

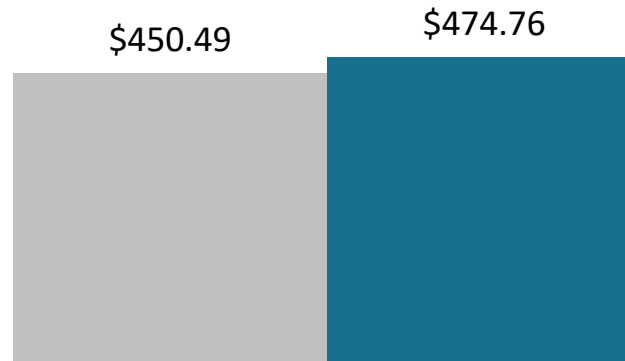
# 78.6%



+ 2.6% from 2025

## AVERAGE DAILY RATE

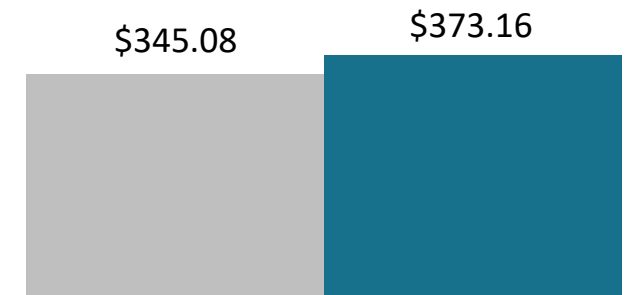
# \$474.76



+ 5.4% from 2025

## REVENUE PER AVAILABLE ROOM

# \$373.16



+ 8.1% from 2025

■ February-25 ■ February-26

<sup>1</sup> Sources: STR data & DSG Occupancy Study data.

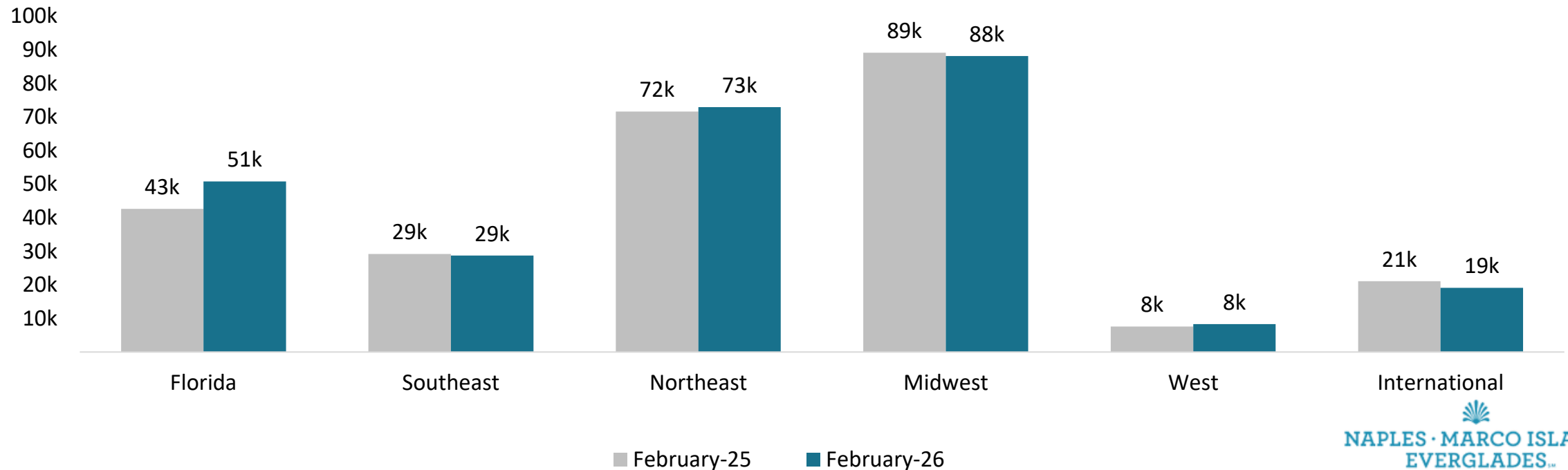
<sup>2</sup> Overall Lodging Metrics are reflective of paid accommodations as a whole, including both hotels and vacation rentals within Collier County.

FLORIDA VISITORS

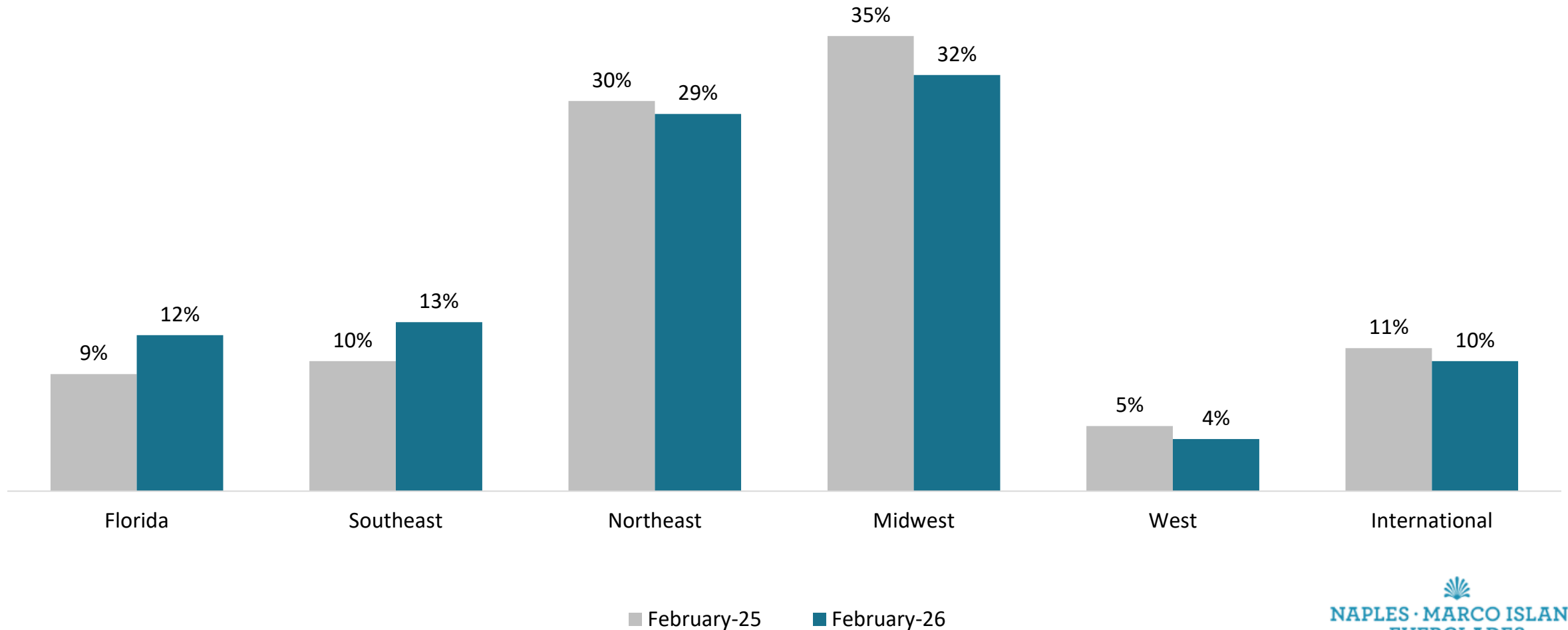
50,800

OUT-OF-STATE VISITORS

217,100



# FEBRUARY 2026 | PAID OVERNIGHT VISITOR ORIGINS





3

MONTHLY  
DESTINATION  
COMPARISONS

# FEBRUARY 2026 COMPARISONS | HOTEL SUPPLY<sup>1</sup>

	Hotel Supply (Rooms)	Δ% in Supply from February 2025
	Total	Total
Miami	1,818,292	- 0.7%
Ft. Lauderdale	1,098,440	+ 1.0%
Palm Beach	537,600	- 0.8%
Ft. Myers	365,736	+ 3.3%
Sarasota	351,176	+ 0.1%
Florida Keys	300,160	+ 0.0%
St. Petersburg	297,192	+ 3.8%
Clearwater	264,460	+ 2.6%
Naples	241,948	+ 1.5%

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

# FEBRUARY 2026 COMPARISONS | HOTEL DEMAND<sup>1</sup>

	Hotel Demand (Rooms)				Δ% in Demand from February 2025			
	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
Miami	1,122,581	320,127	101,457	1,544,166	- 1.6%	- 3.7%	+ 7.6%	- 1.5%
Ft. Lauderdale	715,673	199,076	26,531	941,279	+ 2.6%	+ 12.3%	+ 5.3%	+ 4.5%
Palm Beach	332,348	125,899	11,891	470,138	+ 1.0%	+ 2.6%	+ 15.5%	+ 1.8%
Ft. Myers	217,779	56,200	21,918	295,897	+ 8.0%	+ 3.8%	+ 0.9%	+ 6.6%
Sarasota	208,814	61,944	13,707	284,465	- 5.7%	+ 7.6%	+ 58.4%	- 1.1%
Florida Keys	220,113	43,164	1,093	264,370	- 3.1%	+ 48.0%	+ 45.3%	+ 2.9%
St. Petersburg	162,792	71,081	2,132	236,006	- 2.3%	- 5.6%	- 50.4%	- 4.1%
Clearwater	140,189	70,299	0	210,488	- 8.8%	- 2.1%	-	- 6.7%
Naples	130,433	64,411	0	194,844	+ 1.9%	+ 11.9%	- 100.0%	+ 4.9%

<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.

# FEBRUARY 2026 COMPARISONS | HOTEL OCCUPANCY<sup>1</sup>

	Hotel Occupancy (%)				Δ% in Occupancy from February 2025			
	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
Florida Keys	73.3%	14.4%	0.4%	88.1%	- 3.1%	+ 48.0%	+ 45.3%	+ 2.9%
Palm Beach	61.8%	23.4%	2.2%	87.5%	+ 1.8%	+ 3.5%	+ 16.4%	+ 2.6%
Ft. Lauderdale	65.2%	18.1%	2.4%	85.7%	+ 1.5%	+ 11.1%	+ 4.2%	+ 3.5%
Miami	61.7%	17.6%	5.6%	84.9%	- 0.9%	- 3.0%	+ 8.3%	- 0.8%
Sarasota	59.5%	17.6%	3.9%	81.0%	- 5.8%	+ 7.5%	+ 58.3%	- 1.2%
Ft. Myers	59.5%	15.4%	6.0%	80.9%	+ 4.5%	+ 0.5%	- 2.3%	+ 3.2%
Naples	53.9%	26.6%	0.0%	80.5%	+ 0.4%	+ 10.3%	- 100.0%	+ 3.4%
Clearwater	53.0%	26.6%	0.0%	79.6%	- 11.2%	- 4.6%	0.0%	- 9.1%
St. Petersburg	54.8%	23.9%	0.7%	79.4%	- 5.8%	- 9.0%	- 52.2%	- 7.6%

<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.

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# FEBRUARY 2026 COMPARISONS | HOTEL REVENUE<sup>1</sup>

	Hotel Revenue (Millions of Dollars)				Δ% in Revenue from February 2025			
	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
Miami	\$378.02	\$104.72	\$15.22	\$497.96	+ 7.1%	- 4.7%	+ 8.2%	+ 4.4%
Ft. Lauderdale	\$178.37	\$54.87	\$4.96	\$238.19	+ 9.0%	+ 12.2%	+ 13.9%	+ 9.8%
Palm Beach	\$154.93	\$45.68	\$2.12	\$202.73	+ 15.4%	+ 8.5%	+ 22.2%	+ 13.8%
Florida Keys	\$111.33	\$18.55	\$0.35	\$130.24	+ 6.2%	+ 40.2%	+ 63.7%	+ 10.1%
Naples	\$65.42	\$29.59	\$0.00	\$95.01	+ 7.9%	+ 15.8%	- 100.0%	+ 10.2%
Sarasota	\$62.45	\$16.00	\$2.00	\$80.45	+ 4.1%	+ 11.5%	+ 20.4%	+ 5.9%
Ft. Myers	\$52.14	\$13.13	\$4.21	\$69.49	+ 10.2%	- 0.1%	- 5.1%	+ 7.0%
St. Petersburg	\$38.82	\$14.86	\$0.24	\$53.93	- 1.9%	- 4.2%	- 63.3%	- 3.3%
Clearwater	\$34.71	\$16.22	\$0.00	\$50.94	- 9.6%	- 1.1%	-	- 7.0%

<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.

# FEBRUARY 2026 COMPARISONS | HOTEL AVERAGE DAILY RATE<sup>1</sup>

	Hotel Average Daily Rate (\$)				Δ% in ADR from February 2025			
	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
Florida Keys	\$505.80	\$429.86	\$318.96	\$492.63	+ 9.5%	- 5.3%	+ 12.7%	+ 7.0%
Naples	\$501.54	\$459.38	\$0.00	\$487.60	+ 5.9%	+ 3.5%	- 100.0%	+ 5.0%
Palm Beach	\$466.16	\$362.84	\$178.63	\$431.22	+ 14.2%	+ 5.7%	+ 5.8%	+ 11.9%
Miami	\$336.74	\$327.13	\$149.97	\$322.48	+ 8.8%	- 1.1%	+ 0.5%	+ 6.0%
Sarasota	\$299.06	\$258.37	\$145.71	\$282.81	+ 10.4%	+ 3.6%	- 24.0%	+ 7.0%
Ft. Lauderdale	\$249.23	\$275.62	\$186.81	\$253.05	+ 6.3%	- 0.1%	+ 8.2%	+ 5.0%
Clearwater	\$247.62	\$230.78	\$0.00	\$241.99	- 0.8%	+ 1.0%	0.0%	- 0.4%
Ft. Myers	\$239.44	\$233.69	\$192.30	\$234.85	+ 2.0%	- 3.8%	- 5.9%	+ 0.4%
St. Petersburg	\$238.49	\$209.02	\$114.06	\$228.49	+ 0.3%	+ 1.5%	- 26.0%	+ 0.9%

<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.

# FEBRUARY 2026 COMPARISONS | HOTEL REVPAR<sup>1</sup>

	Hotel Revenue Per Available Room (\$)				Δ% in RevPAR from February 2025			
	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
Florida Keys	\$370.91	\$61.82	\$1.16	\$433.89	+ 6.2%	+ 40.1%	+ 63.7%	+ 10.1%
Naples	\$270.38	\$122.30	\$0.00	\$392.67	+ 6.3%	+ 14.1%	- 100.0%	+ 8.5%
Palm Beach	\$288.18	\$84.97	\$3.95	\$377.11	+ 16.3%	+ 9.4%	+ 23.2%	+ 14.7%
Miami	\$207.90	\$57.59	\$8.37	\$273.86	+ 7.8%	- 4.1%	+ 8.9%	+ 5.1%
Sarasota	\$177.83	\$45.57	\$5.69	\$229.09	+ 4.0%	+ 11.4%	+ 20.3%	+ 5.8%
Ft. Lauderdale	\$162.38	\$49.95	\$4.51	\$216.85	+ 7.9%	+ 11.0%	+ 12.7%	+ 8.7%
Clearwater	\$131.26	\$61.34	\$0.00	\$192.60	- 11.9%	- 3.6%	0.0%	- 9.4%
Ft. Myers	\$142.57	\$35.91	\$11.52	\$190.01	+ 6.7%	- 3.3%	- 8.1%	+ 3.6%
St. Petersburg	\$130.64	\$49.99	\$0.82	\$181.45	- 5.5%	- 7.7%	- 64.6%	- 6.8%

<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.

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INDUSTRY DATA

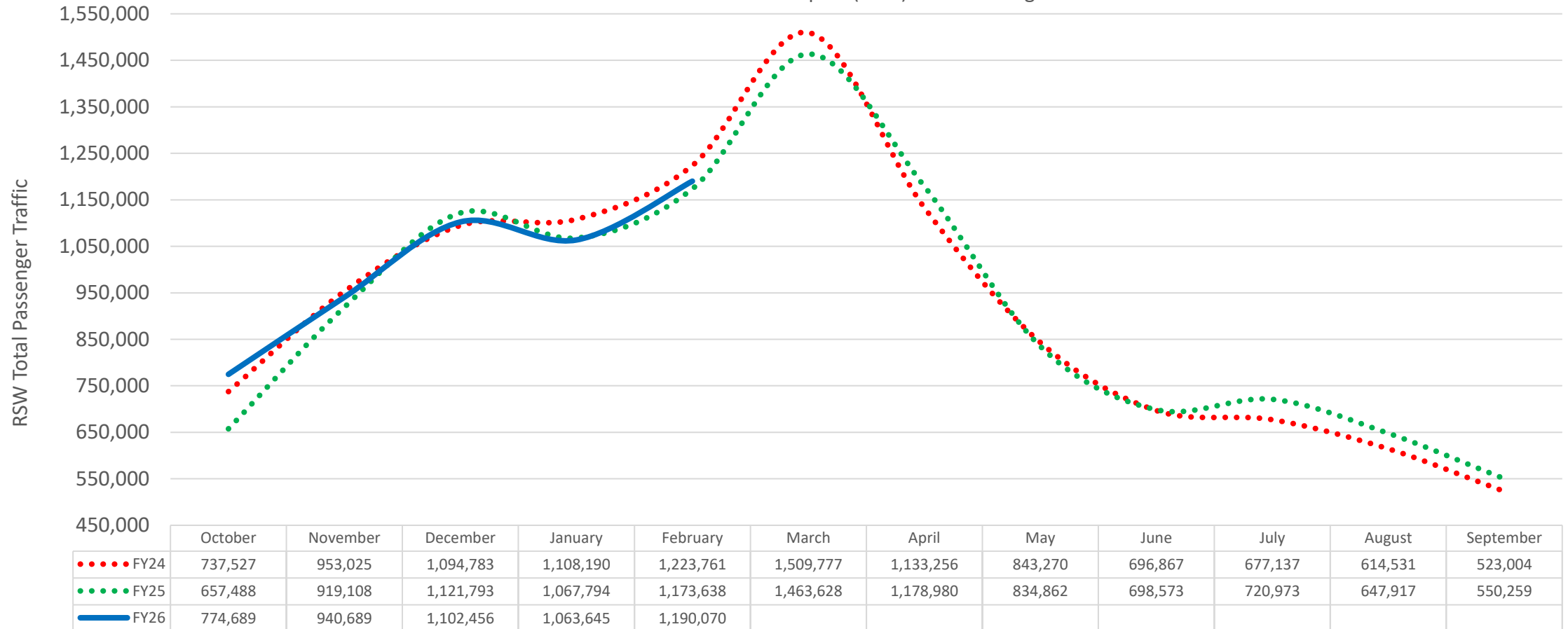
Collier County Direct Leisure and Hospitality Employment<sup>1</sup>



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

# INDUSTRY DATA | RSW TOTAL PASSENGER TRAFFIC

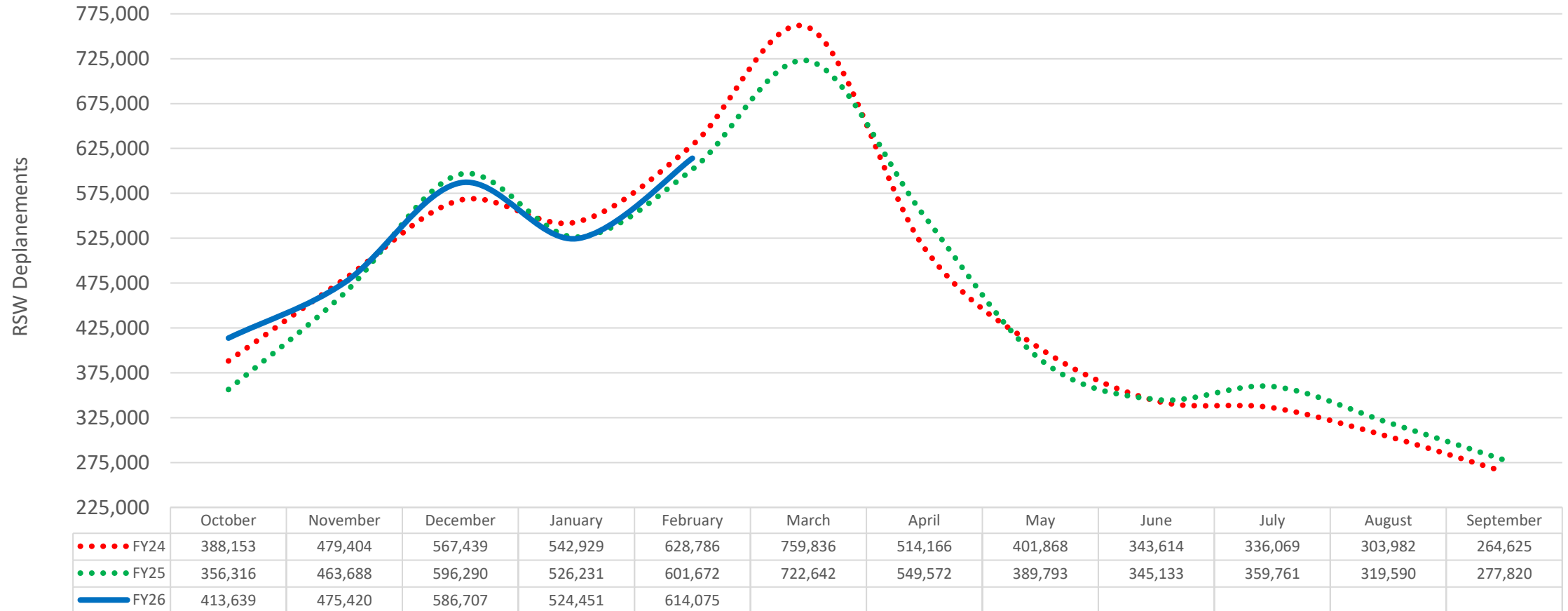
Southwest Florida International Airport (RSW) Total Passenger Traffic<sup>1</sup>



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

# INDUSTRY DATA | RSW INFLOW (DEPLANEMENTS)

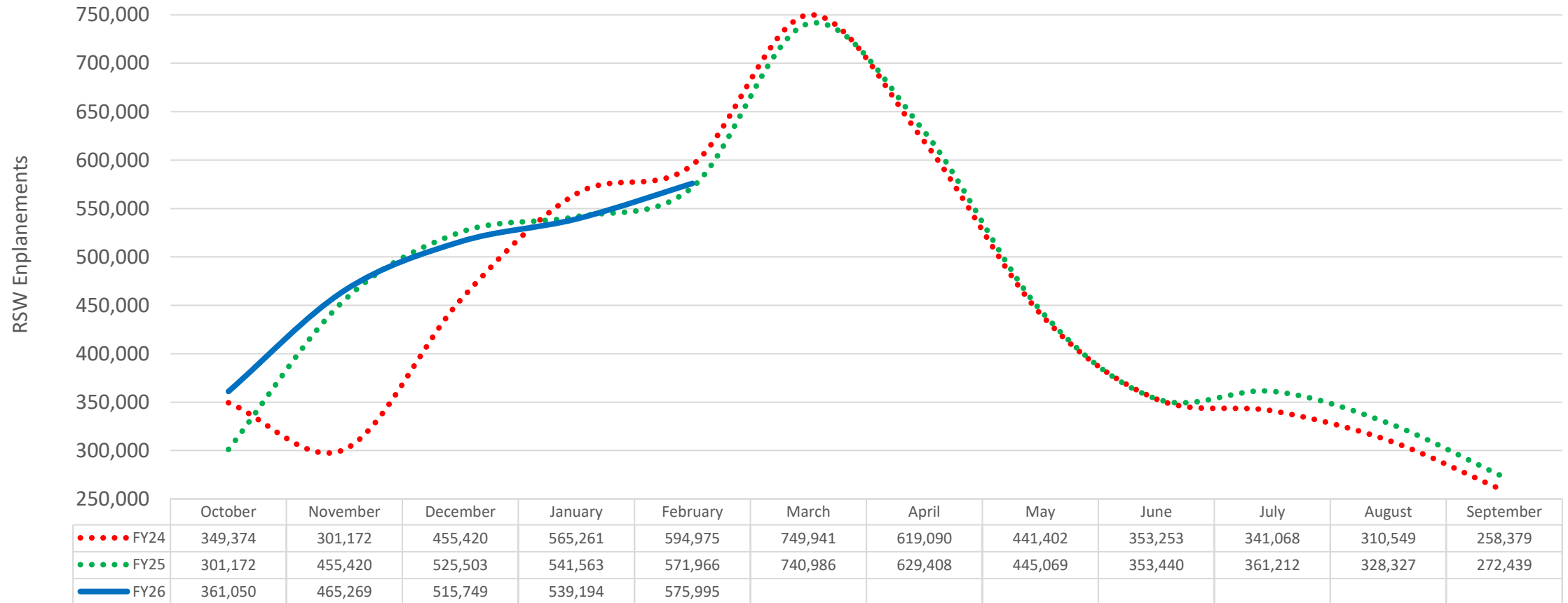
Southwest Florida International Airport (RSW) Deplanements<sup>1</sup>



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

# INDUSTRY DATA | RSW OUTFLOW (ENPLANEMENTS)

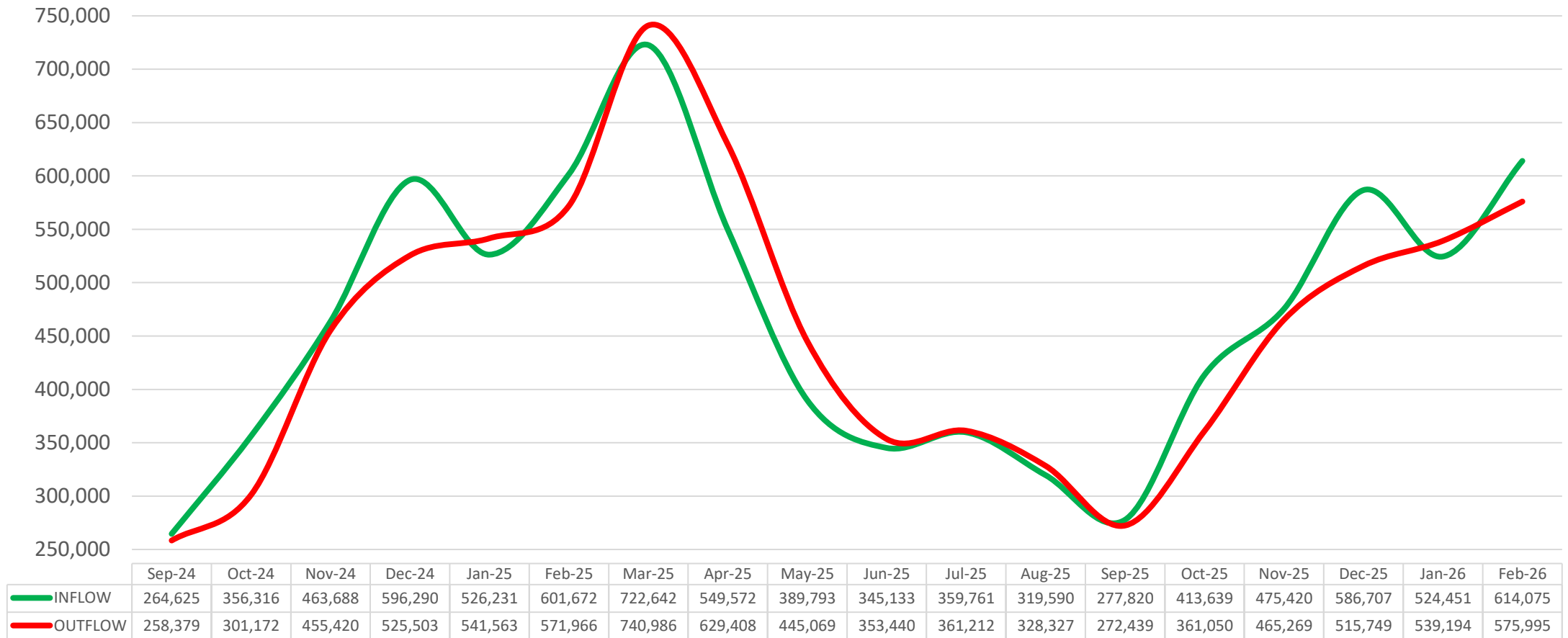
Southwest Florida International Airport (RSW) Enplanements<sup>1</sup>



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

# INDUSTRY DATA | LAST 18 MONTHS RSW INFLOW VS. OUTFLOW

Southwest Florida International Airport (RSW) Inflow (Deplanements) vs. Outflow (Enplanements)<sup>1</sup>



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

Licensed Transient Rental Units as of March 1 <sup>st</sup> , 2026 <sup>1</sup>				
	Hotel	Motel	Vacation Rental	Total
Naples	5,817	1,245	3,562	<b>10,624</b>
Marco Island	1,275	121	2,012	<b>3,408</b>
Immokalee	0	70	106	<b>176</b>
Everglades City	38	36	2	<b>76</b>
Goodland	0	0	59	<b>59</b>
Chokoloskee	0	13	1	<b>14</b>
Ave Maria	0	0	4	<b>4</b>
<b>Total</b>	<b>7,130</b>	<b>1,485</b>	<b>5,746</b>	<b>14,361</b>

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

A tropical beach scene at sunset. The sky is filled with dramatic, dark clouds on the left and soft, colorful clouds on the right. The ocean is calm, reflecting the light from the sky. In the foreground, a wide, sandy beach stretches from the water's edge towards the right. On the right side of the beach, there is a large, multi-story house with a balcony, surrounded by several tall palm trees. The overall atmosphere is serene and picturesque.

**THANK YOU**