



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

FLORIDA'S PARADISE COAST

January 2026 Monthly Visitor Dashboard

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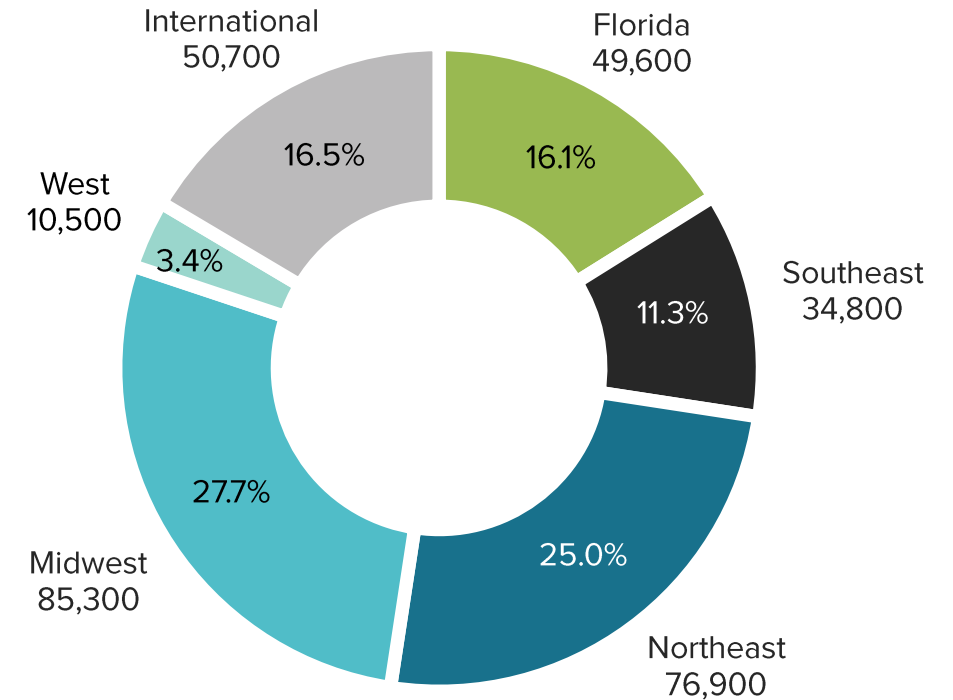
MONTHLY  
HIGHLIGHTS

# January 2026 | TOURISM METRICS

Metric	January 2025	January 2026	Percent Change
Visitors	286,800	307,800	+ 7.3%
Visitor Days	1,915,800	2,173,100	+ 13.4%
Direct Spending	\$324,649,100	\$356,544,900	+ 9.8%
Room Nights	276,100	281,800	+ 2.1%
Occupancy	66.2%	65.0%	- 1.8%
Average Daily Rate	\$485.57	\$499.32	+ 2.8%
RevPAR	\$321.45	\$324.56	+ 1.0%

# JANUARY 2026 | VISITOR ORIGIN REGIONS

Region	January 2025		January 2026		Percent Change (±Δ%)	
	# Visitors	% Share	# Visitors	% Share	# Visitors	% Share
<b>Domestic</b>	232,400	81.0%	257,100	83.5%	+ 10.6%	+ 3.0%
Florida	46,900	16.3%	49,600	16.1%	+ 5.8%	- 1.5%
Southeast	31,700	11.1%	34,800	11.3%	+ 9.8%	+ 2.2%
Northeast	64,300	22.4%	76,900	25.0%	+ 19.6%	+ 11.5%
Midwest	79,600	27.8%	85,300	27.7%	+ 7.2%	- 0.2%
West	9,900	3.4%	10,500	3.4%	+ 6.1%	- 1.5%
<b>International</b>	54,400	19.0%	50,700	16.5%	- 6.8%	- 13.0%
Canada	20,700	7.2%	17,500	5.7%	- 15.5%	- 21.0%
Europe	23,800	8.3%	23,700	7.7%	- 0.4%	- 7.2%
C/S America	5,700	2.0%	5,500	1.8%	- 3.5%	- 9.4%
Other	4,200	1.5%	4,000	1.3%	- 4.8%	- 11.2%
<b>Total</b>	<b>286,800</b>	<b>100.0%</b>	<b>307,800</b>	<b>100.0%</b>	<b>+ 7.3%</b>	

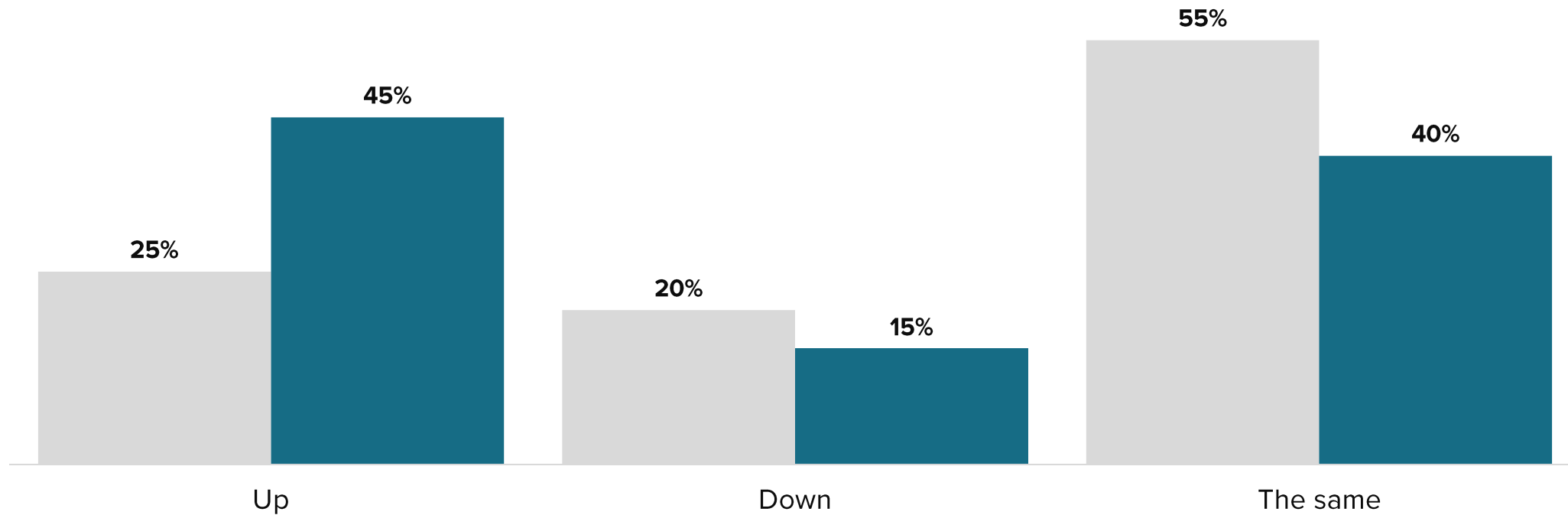


## Highlights

- Visitation increased 7.3% from January 2025.
- Direct Spending increased 9.8% from January 2025.
- Hotel Industry Trends in January 2026 in Collier County:
  - Leisure Demand increased 6.6% year-over-year.
  - Hotel Average Daily Rate (ADR) was \$381.38, a 5.2% increase year-over-year.
  - Hotel Occupancy was 68.9%, a 1.6% decrease year-over-year.
  - Hotel Room Supply was up 1.5% from January 2025.
- International Visitation in January 2026 again saw a noticeable uptick from previous months, although still down 6.8% year-over-year.

# 3-MONTH FORECAST<sup>1</sup> | FEBRUARY - APRIL

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.

■ January-25 ■ January-26

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.



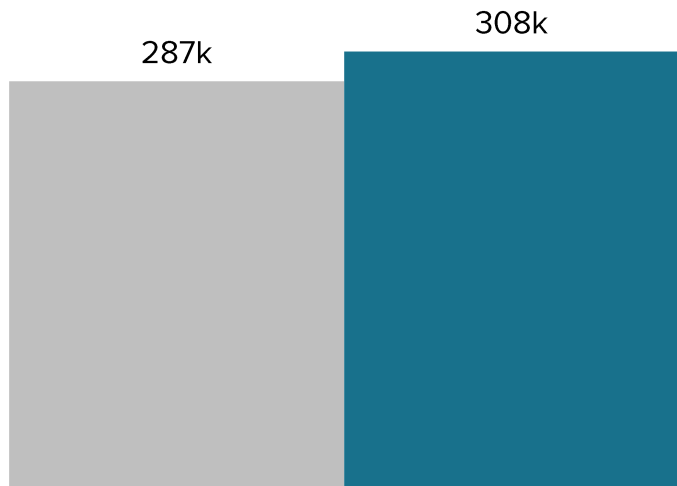
# 2

## EXECUTIVE MONTHLY SUMMARY

# JANUARY 2026 | VISITATION & ROOM NIGHTS

VISITORS

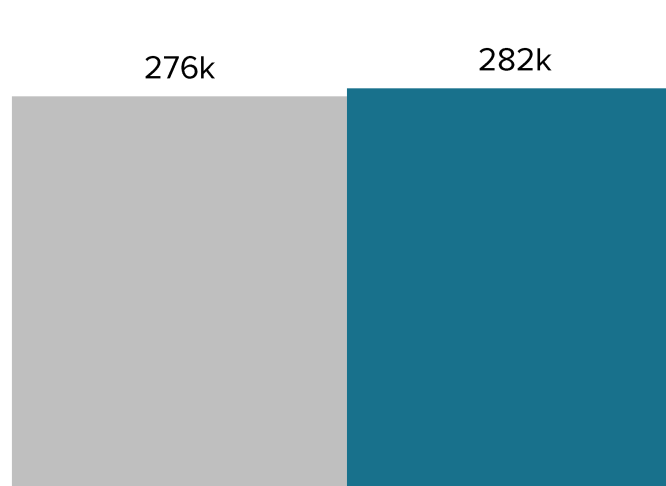
307,800



+ 7.3% from 2025

ROOM NIGHTS

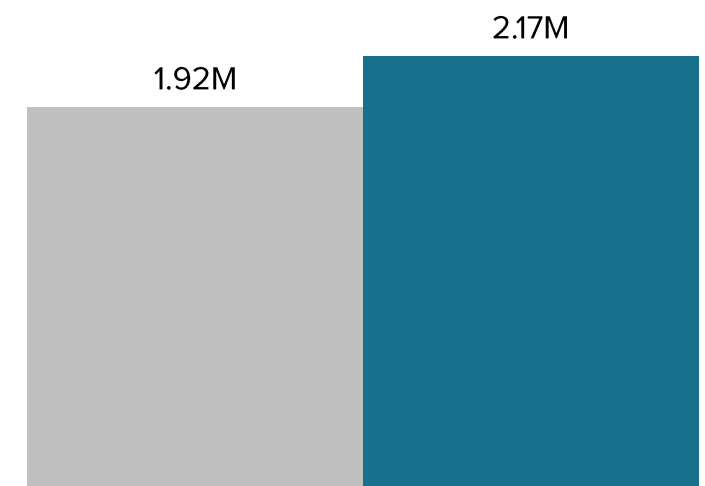
281,800



+ 2.1% from 2025

VISITOR DAYS

2,173,100



+ 13.4% from 2025

■ January-25 ■ January-26

DIRECT SPENDING  
**\$356,544,900**

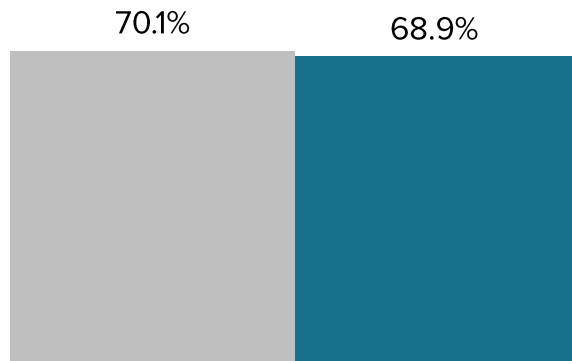


+ **9.8%** from 2025

■ January-25 ■ January-26

## OCCUPANCY RATE

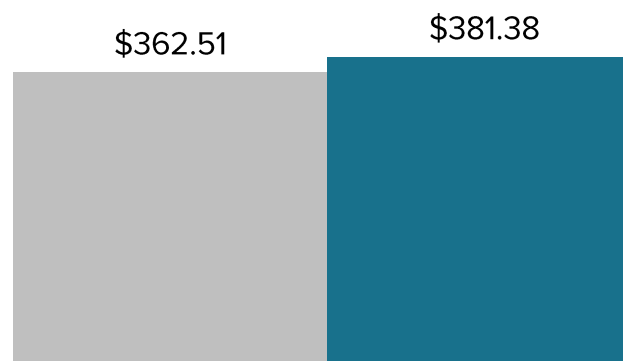
# 68.9%



- **1.6%** from 2025

## AVERAGE DAILY RATE

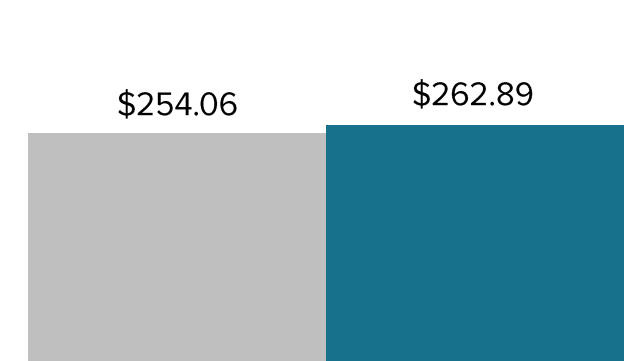
# \$381.38



+ **5.2%** from 2025

## REVENUE PER AVAILABLE ROOM

# \$262.89



+ **3.5%** from 2025

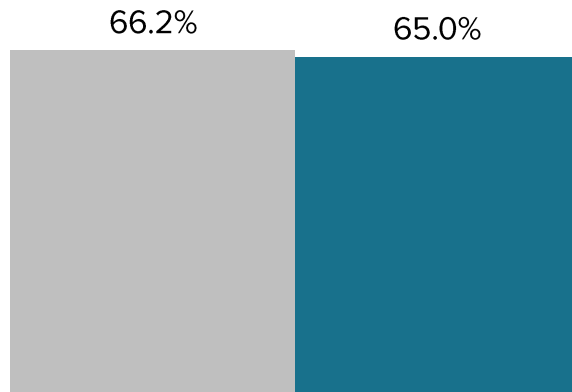
■ January-25 ■ January-26

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

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

## OCCUPANCY RATE

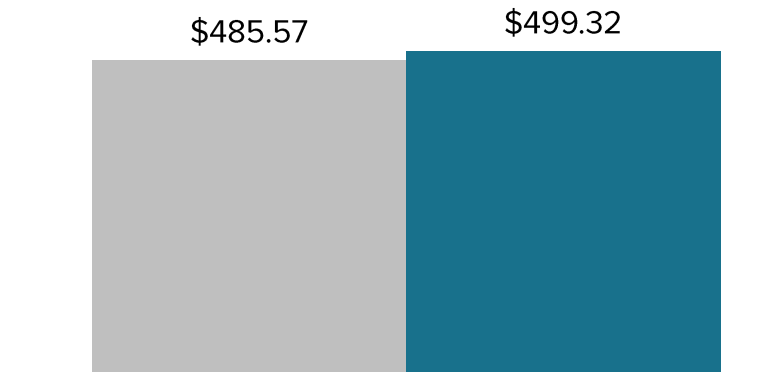
65.0%



- 1.8% from 2025

## AVERAGE DAILY RATE

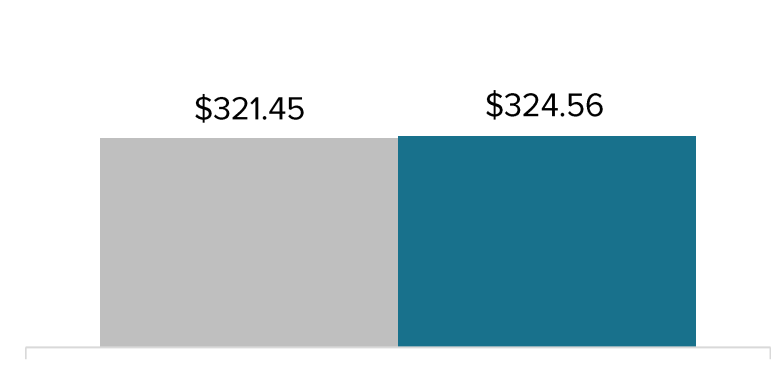
\$499.32



+ 2.8% from 2025

## REVENUE PER AVAILABLE ROOM

\$324.56



+ 1.0% from 2025

■ January-25 ■ January-26

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

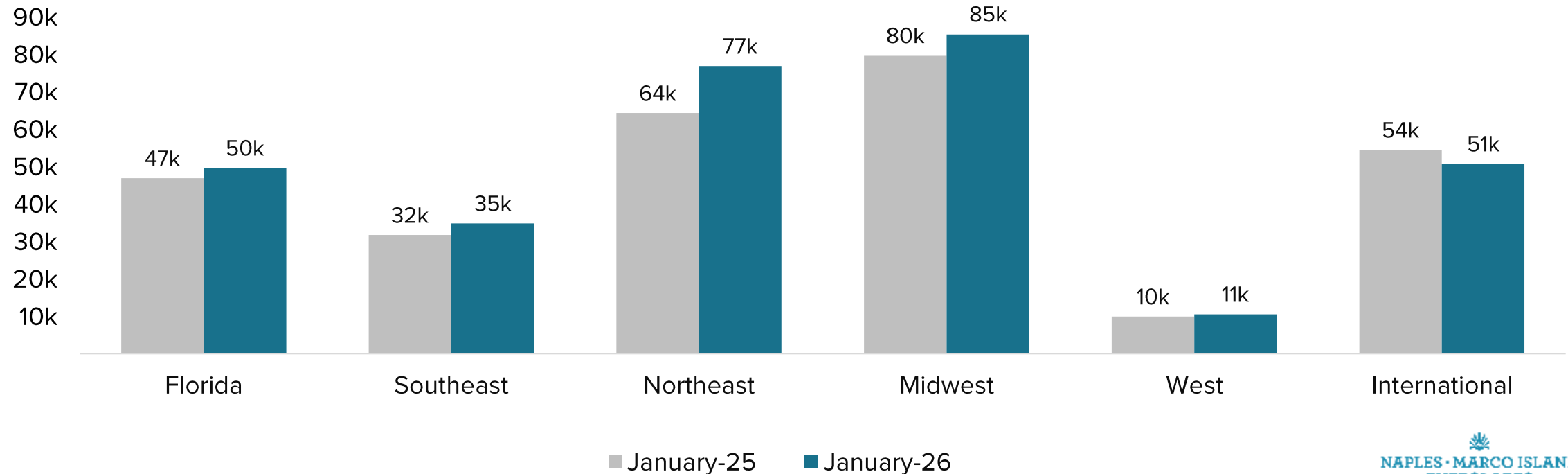
<sup>2</sup> Overall Lodging Metrics are reflective of paid accommodations as a whole, including both hotels and vacation rentals within Collier County.

## FLORIDA VISITORS

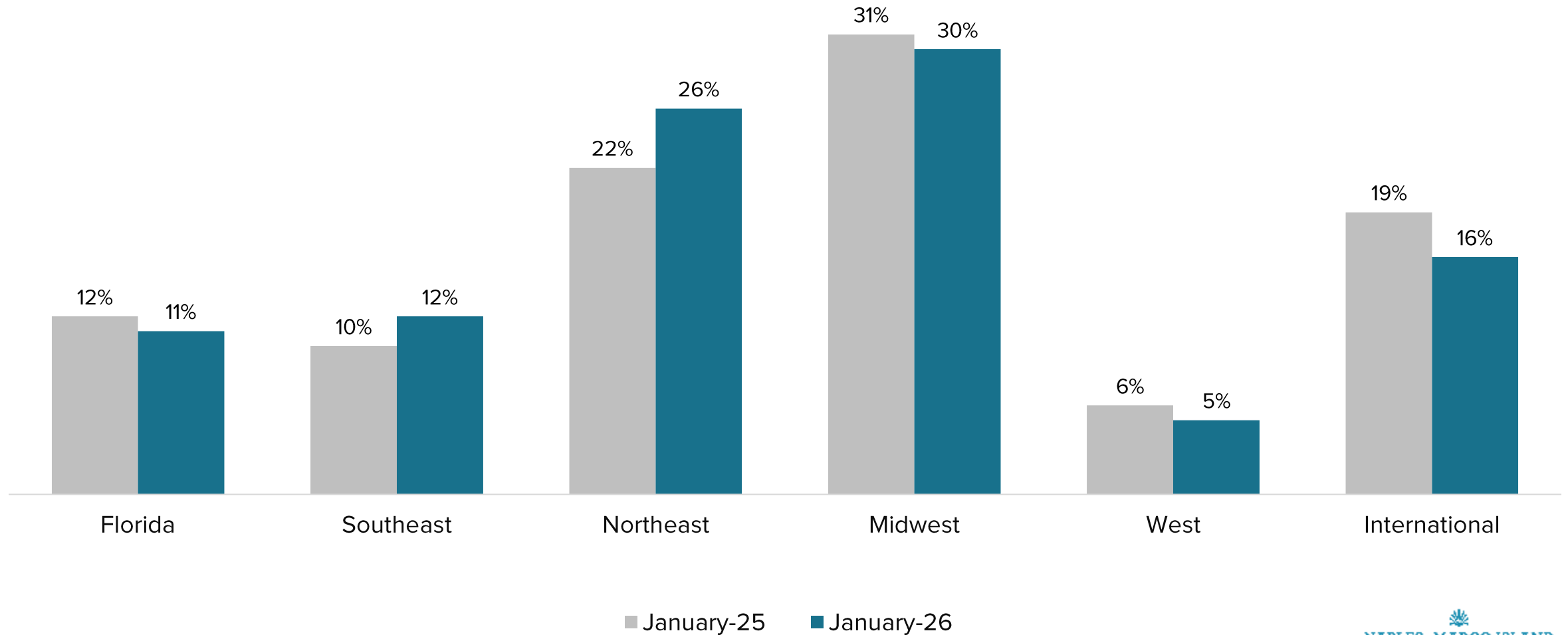
# 49,600

## OUT-OF-STATE VISITORS

# 258,200



# JANUARY 2026 | PAID OVERNIGHT VISITOR ORIGINS



■ January-25 ■ January-26



# 4a

MONTHLY  
DESTINATION  
COMPARISONS

# JANUARY 2026 COMPARISONS | SUPPLY<sup>1</sup>

	Hotel Supply (Rooms)	Δ% in Supply from January 2025
	Total	Total
Miami	2,015,589	- 0.6%
Ft. Lauderdale	1,216,006	+ 1.0%
Palm Beach	595,975	- 0.7%
Ft. Myers	406,999	+ 6.7%
Sarasota	387,655	- 1.1%
Florida Keys	332,382	0.0%
St. Petersburg	330,491	+ 4.8%
Clearwater	286,750	+ 4.1%
Naples	267,871	+ 1.5%

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

# JANUARY 2026 COMPARISONS | DEMAND<sup>1</sup>

	Hotel Demand (Rooms)				Δ% in Demand from January 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	1,210,912	323,927	115,813	1,650,652	+ 1.6%	+ 3.7%	+ 10.4%	+ 2.6%
Ft. Lauderdale	742,253	203,388	27,736	973,378	+ 8.8%	+ 8.8%	+ 5.1%	+ 8.7%
Palm Beach	331,241	131,057	10,867	473,166	+ 0.6%	+ 9.6%	+ 18.7%	+ 3.3%
Ft. Myers	199,890	51,086	21,744	272,720	+ 7.8%	- 7.7%	+ 15.5%	+ 5.0%
Florida Keys	225,191	40,379	1,271	266,841	+ 5.2%	- 3.3%	+ 65.2%	+ 4.0%
Sarasota	195,092	63,032	6,015	264,139	- 5.4%	- 8.8%	- 34.1%	- 7.1%
St. Petersburg	149,775	58,122	2,153	210,050	- 14.6%	- 18.0%	- 63.4%	- 16.7%
Naples	126,390	58,236	21	184,648	+ 6.6%	- 12.1%	- 79.2%	- 0.1%
Clearwater	115,031	63,870	0	178,901	- 17.5%	- 15.9%	-	- 17.0%

<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.

# JANUARY 2026 COMPARISONS | OCCUPANCY<sup>1</sup>

	Hotel Occupancy (%)				Δ% in Occupancy from January 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	60.1%	16.1%	5.7%	81.9%	+ 2.2%	+ 4.4%	+ 11.1%	+ 3.2%
Florida Keys	67.8%	12.1%	0.4%	80.3%	+ 5.2%	- 3.3%	+ 65.2%	+ 4.0%
Ft. Lauderdale	61.0%	16.7%	2.3%	80.0%	+ 7.7%	+ 7.6%	+ 4.1%	+ 7.6%
Palm Beach	55.6%	22.0%	1.8%	79.4%	+ 1.2%	+ 10.3%	+ 19.5%	+ 4.0%
Naples	47.2%	21.7%	0.0%	68.9%	+ 5.0%	- 13.4%	- 79.5%	- 1.6%
Sarasota	50.3%	16.3%	1.6%	68.1%	- 6.4%	- 9.8%	- 34.8%	- 8.1%
Ft. Myers	49.1%	12.6%	5.3%	67.0%	+ 1.0%	- 13.5%	+ 8.2%	- 1.6%
St. Petersburg	45.3%	17.6%	0.7%	63.6%	- 18.5%	- 21.7%	- 65.1%	- 20.5%
Clearwater	40.1%	22.3%	0.0%	62.4%	- 20.8%	- 19.2%	0.0%	- 20.2%

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

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# JANUARY 2026 COMPARISONS | REVENUE<sup>1</sup>

	Hotel Revenue (Millions of Dollars)				Δ% in Revenue from January 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	\$359.97	\$98.91	\$16.24	\$475.12	+ 16.5%	+ 12.1%	+ 8.1%	+ 15.2%
Ft. Lauderdale	\$159.79	\$52.52	\$4.87	\$217.18	+ 18.7%	+ 10.2%	+ 10.9%	+ 16.3%
Palm Beach	\$116.93	\$42.35	\$1.92	\$161.20	+ 13.4%	+ 8.3%	+ 31.7%	+ 12.2%
Florida Keys	\$97.61	\$16.54	\$0.43	\$114.58	+ 18.3%	+ 5.4%	+ 69.4%	+ 16.4%
Naples	\$49.64	\$20.78	\$0.00	\$70.42	+ 16.2%	- 14.4%	- 87.6%	+ 5.0%
Sarasota	\$41.94	\$13.76	\$0.99	\$56.68	- 4.2%	- 10.4%	- 39.1%	- 6.7%
Ft. Myers	\$35.52	\$10.52	\$3.97	\$50.00	+ 4.8%	- 8.6%	+ 11.2%	+ 2.1%
St. Petersburg	\$25.08	\$10.57	\$0.23	\$35.88	- 21.6%	- 20.8%	- 69.8%	- 22.2%
Clearwater	\$20.44	\$13.27	\$0.00	\$33.71	- 18.2%	- 15.3%	-	- 17.1%

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

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# JANUARY 2026 COMPARISONS | DAILY RATE<sup>1</sup>

	Hotel Average Daily Rate (\$)				Δ% in ADR from January 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	\$433.46	\$409.56	\$336.14	\$429.38	+ 12.5%	+ 9.0%	+ 2.5%	+ 11.9%
Naples	\$392.78	\$356.74	\$139.26	\$381.38	+ 9.0%	- 2.7%	- 40.3%	+ 5.2%
Palm Beach	\$353.01	\$323.11	\$176.52	\$340.67	+ 12.7%	- 1.2%	+ 11.0%	+ 8.6%
Miami	\$297.27	\$305.33	\$140.23	\$287.84	+ 14.7%	+ 8.1%	- 2.1%	+ 12.4%
Ft. Lauderdale	\$215.28	\$258.21	\$175.45	\$223.11	+ 9.1%	+ 1.3%	+ 5.4%	+ 7.1%
Sarasota	\$214.97	\$218.26	\$164.16	\$214.60	+ 1.2%	- 1.7%	- 7.6%	+ 0.5%
Clearwater	\$177.70	\$207.75	\$0.00	\$188.42	- 0.8%	+ 0.7%	0.0%	- 0.2%
Ft. Myers	\$177.68	\$205.96	\$182.36	\$183.35	- 2.7%	- 1.0%	- 3.7%	- 2.8%
St. Petersburg	\$167.46	\$181.85	\$108.96	\$170.84	- 8.2%	- 3.5%	- 17.4%	- 6.6%

<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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<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.

# JANUARY 2026 COMPARISONS | REVPAR

	Hotel Revenue Per Available Room (\$)				Δ% in RevPAR from January 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	\$293.67	\$49.75	\$1.29	\$344.71	+ 18.3%	+ 5.4%	+ 69.3%	+ 16.4%
Palm Beach	\$196.20	\$71.05	\$3.22	\$270.47	+ 14.2%	+ 9.0%	+ 32.6%	+ 12.9%
Naples	\$185.33	\$77.56	\$0.01	\$262.89	+ 14.4%	- 15.7%	- 87.8%	+ 3.5%
Miami	\$178.59	\$49.07	\$8.06	\$235.72	+ 17.2%	+ 12.8%	+ 8.8%	+ 16.0%
Ft. Lauderdale	\$131.41	\$43.19	\$4.00	\$178.60	+ 17.5%	+ 9.1%	+ 9.7%	+ 15.1%
Sarasota	\$108.19	\$35.49	\$2.55	\$146.22	- 5.2%	- 11.3%	- 39.8%	- 7.7%
Ft. Myers	\$87.26	\$25.85	\$9.74	\$122.86	- 1.8%	- 14.4%	+ 4.2%	- 4.3%
Clearwater	\$71.28	\$46.27	\$0.00	\$117.56	- 21.4%	- 18.6%	0.0%	- 20.3%
St. Petersburg	\$75.89	\$31.98	\$0.71	\$108.58	- 25.2%	- 24.4%	- 71.2%	- 25.7%

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

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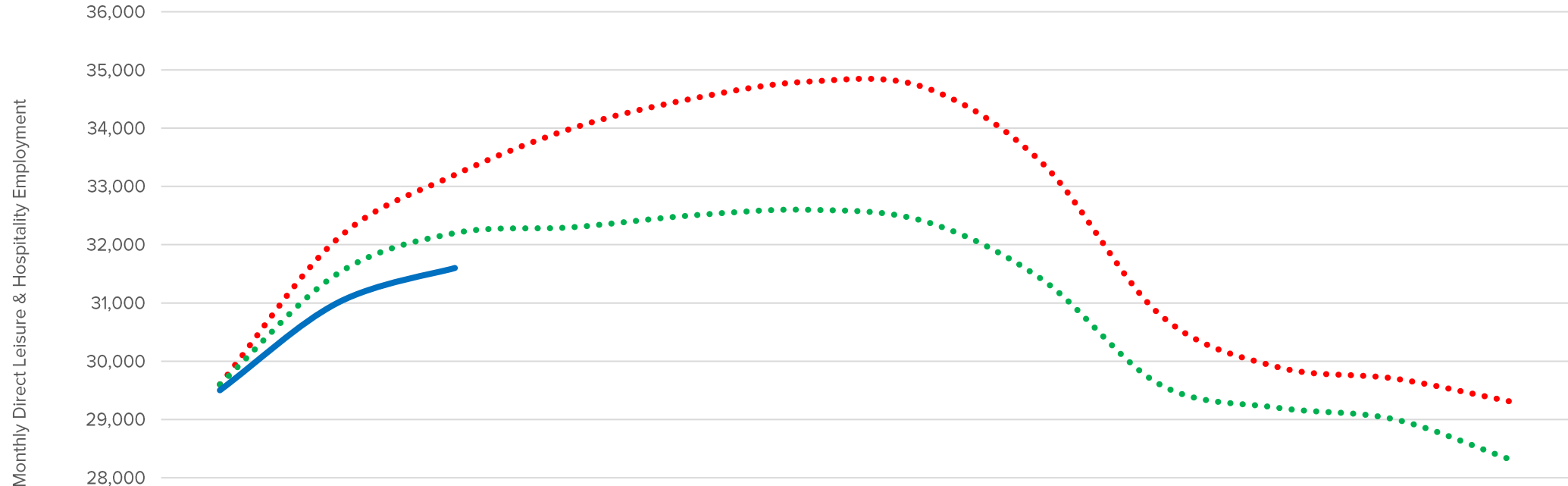


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INDUSTRY  
DATA

# INDUSTRY DATA | CURRENT EMPLOYMENT

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

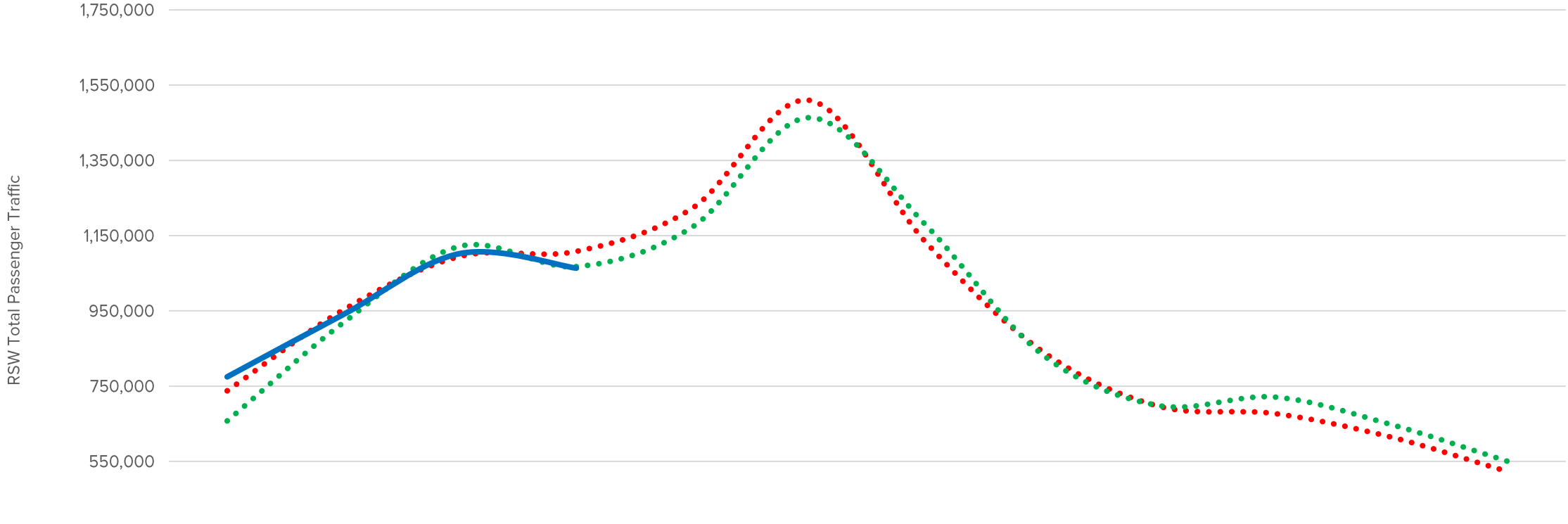


	October	November	December	January	February	March	April	May	June	July	August	September
●●●●● FY24	29,600	32,100	33,200	34,000	34,500	34,800	34,700	33,400	30,800	29,900	29,700	29,300
●●●●● FY25	29,600	31,500	32,200	32,300	32,500	32,600	32,400	31,400	29,600	29,200	29,000	28,300
— FY26	29,500	31,000	31,600 (P)									

<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>

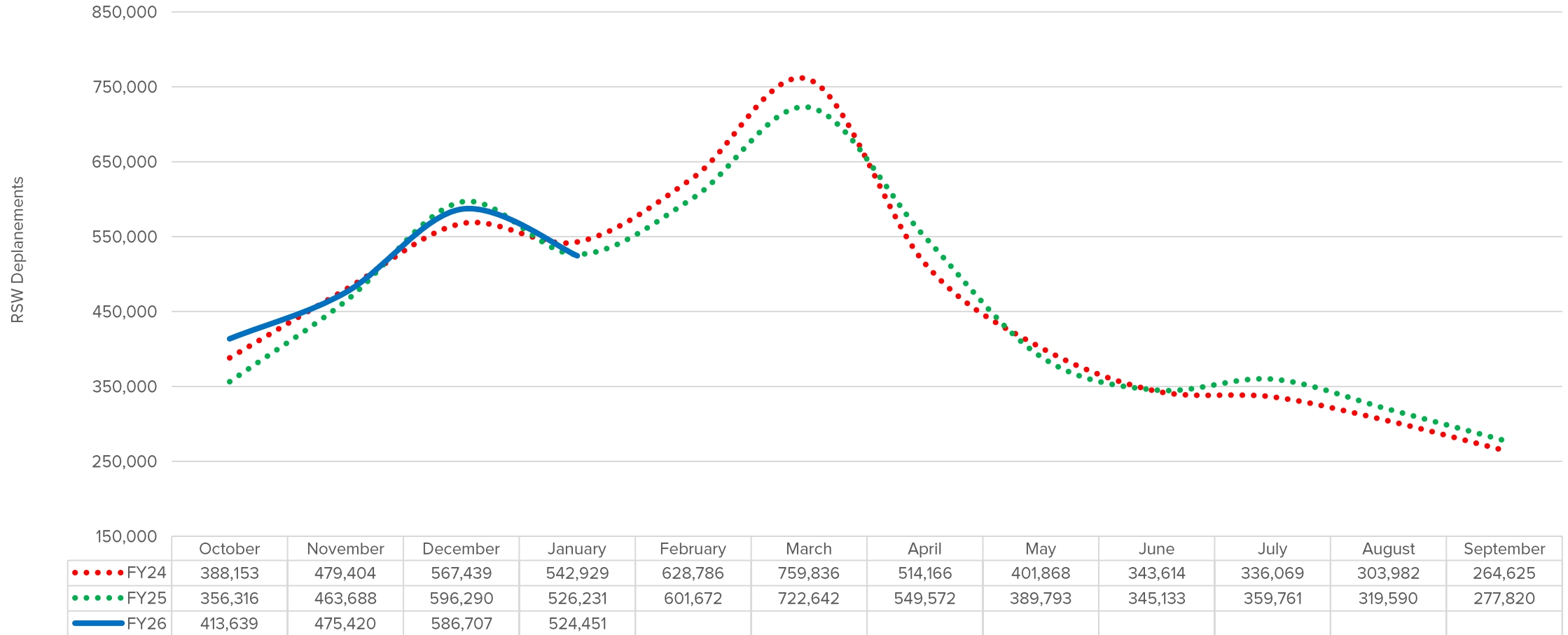


	October	November	December	January	February	March	April	May	June	July	August	September
●●●●● FY24	737,527	953,025	1,094,783	1,108,190	1,223,761	1,509,777	1,133,256	843,270	696,867	677,137	614,531	523,004
●●●●● FY25	657,488	919,108	1,121,793	1,067,794	1,173,638	1,463,628	1,178,980	834,862	698,573	720,973	647,917	550,259
— FY26	774,689	940,689	1,102,456	1,063,645								

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

# INDUSTRY DATA | RSW INFLOW (DEPLANEMENTS)

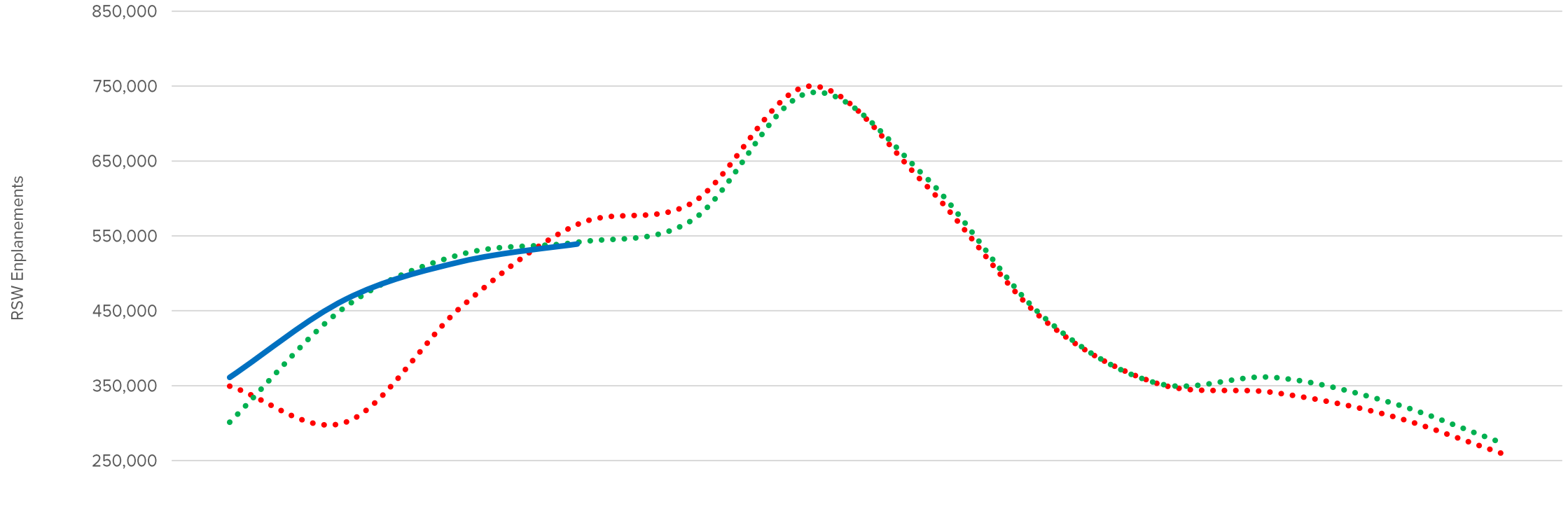
Southwest Florida International Airport (RSW) Deplanements<sup>1</sup>



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

# INDUSTRY DATA | RSW OUTFLOW (ENPLANEMENTS)

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

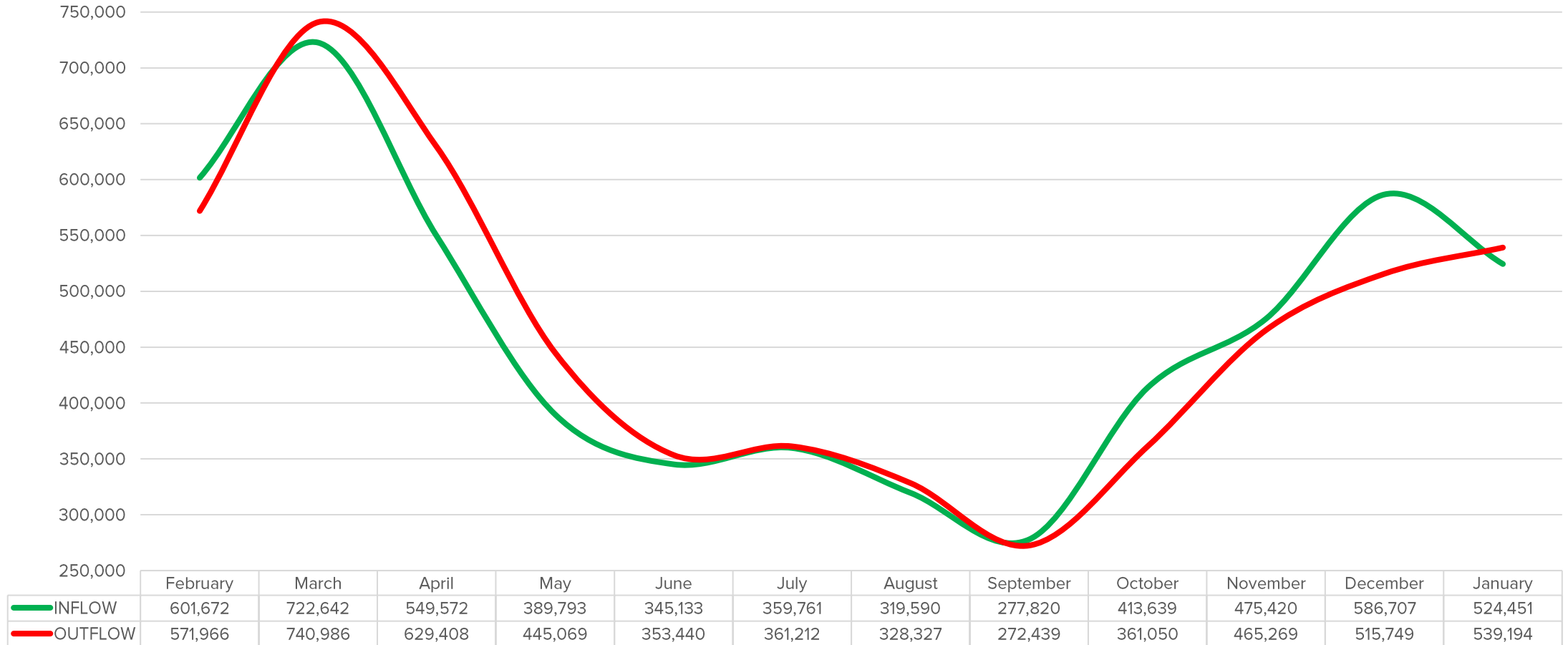


	October	November	December	January	February	March	April	May	June	July	August	September
●●●●● FY24	349,374	301,172	455,420	565,261	594,975	749,941	619,090	441,402	353,253	341,068	310,549	258,379
●●●●● FY25	301,172	455,420	525,503	541,563	571,966	740,986	629,408	445,069	353,440	361,212	328,327	272,439
— FY26	361,050	465,269	515,749	539,194								

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

# INDUSTRY DATA | LAST 12 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 February 1 <sup>st</sup> , 2026 <sup>1</sup>				
	Hotel	Motel	Vacation Rental	Total
Naples	5,473	1,256	3,351	<b>10,080</b>
Marco Island	1,275	121	2,093	<b>3,489</b>
Immokalee	0	70	106	<b>176</b>
Everglades City	38	36	8	<b>82</b>
Goodland	0	0	31	<b>31</b>
Chokoloskee	0	13	1	<b>14</b>
Ave Maria	0	0	3	<b>3</b>
<b>Total</b>	<b>6,786</b>	<b>1,496</b>	<b>5,593</b>	<b>13,875</b>

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



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

FLORIDA'S PARADISE COAST

January 2026 Monthly Visitor Dashboard