



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

FLORIDA'S PARADISE COAST

August 2025 Monthly Visitor Dashboard

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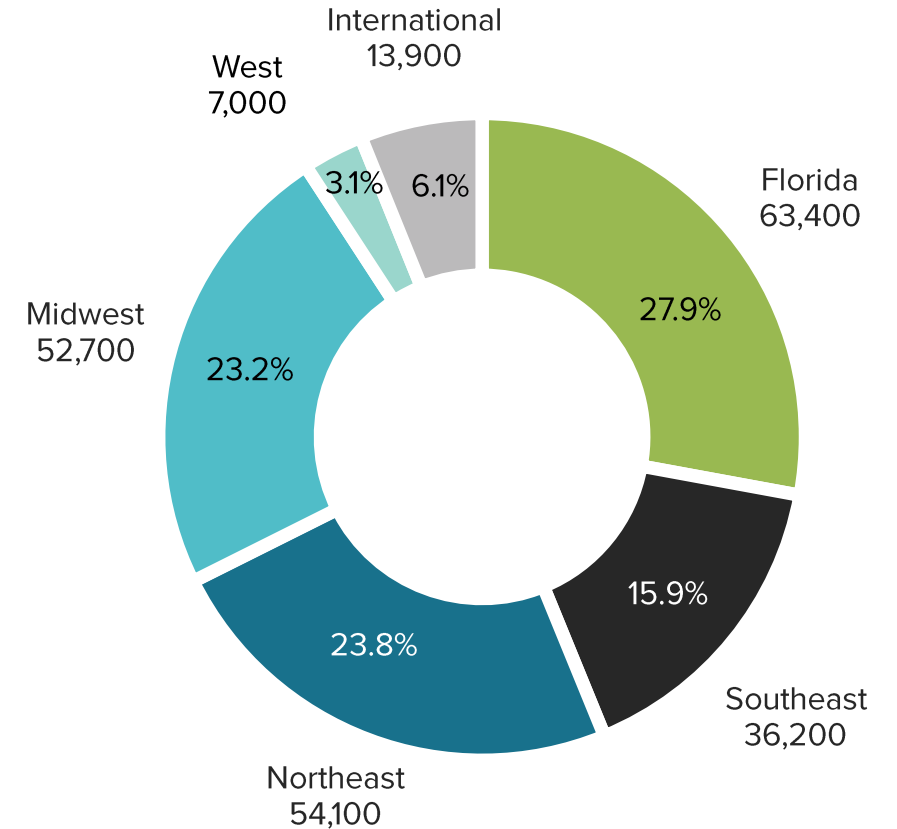
MONTHLY  
HIGHLIGHTS

# August 2025 | TOURISM METRICS

Metric	August 2024	August 2025	Percent Change
Visitors	205,200	227,300	+ 10.8%
Visitor Days	1,087,600	1,257,000	+ 15.6%
Direct Spending	\$142,899,100	\$156,784,600	+ 9.7%
Economic Impact	\$198,058,200	\$216,676,300	+ 9.4%
Room Nights	176,200	187,100	+ 6.2%
Occupancy	45.4%	45.8%	+ 0.9%
Average Daily Rate	\$232.20	\$233.81	+ 0.7%
RevPAR	\$105.42	\$107.08	+ 1.6%

# AUGUST 2025 | VISITOR ORIGIN REGIONS

	August 2024		August 2025		Percent Change (±Δ%)	
Region	# Visitors	% Share	# Visitors	% Share	# Visitors	% Share
Domestic	190,700	92.9%	213,400	93.9%	+ 11.9%	+ 1.0%
Florida	56,100	27.3%	63,400	27.9%	+ 13.0%	+ 2.1%
Southeast	28,900	14.1%	36,200	15.9%	+ 25.3%	+ 12.9%
Northeast	44,100	21.5%	54,100	23.8%	+ 22.7%	+ 10.7%
Midwest	54,400	26.5%	52,700	23.2%	- 3.1%	- 12.5%
West	7,200	3.5%	7,000	3.1%	- 2.8%	- 11.7%
International	14,500	7.1%	13,900	6.1%	- 4.1%	- 13.7%
Canada	3,900	1.9%	4,300	1.9%	+ 10.3%	-
Europe	8,000	3.9%	7,300	3.2%	- 8.8%	- 17.9%
C/S America	1,000	0.5%	1,800	0.8%	+ 80.0%	+ 64.2%
Other	1,600	0.8%	500	0.2%	- 68.8%	- 74.4%
Total	205,200	100.0%	227,300	100.0%	+ 10.8%	

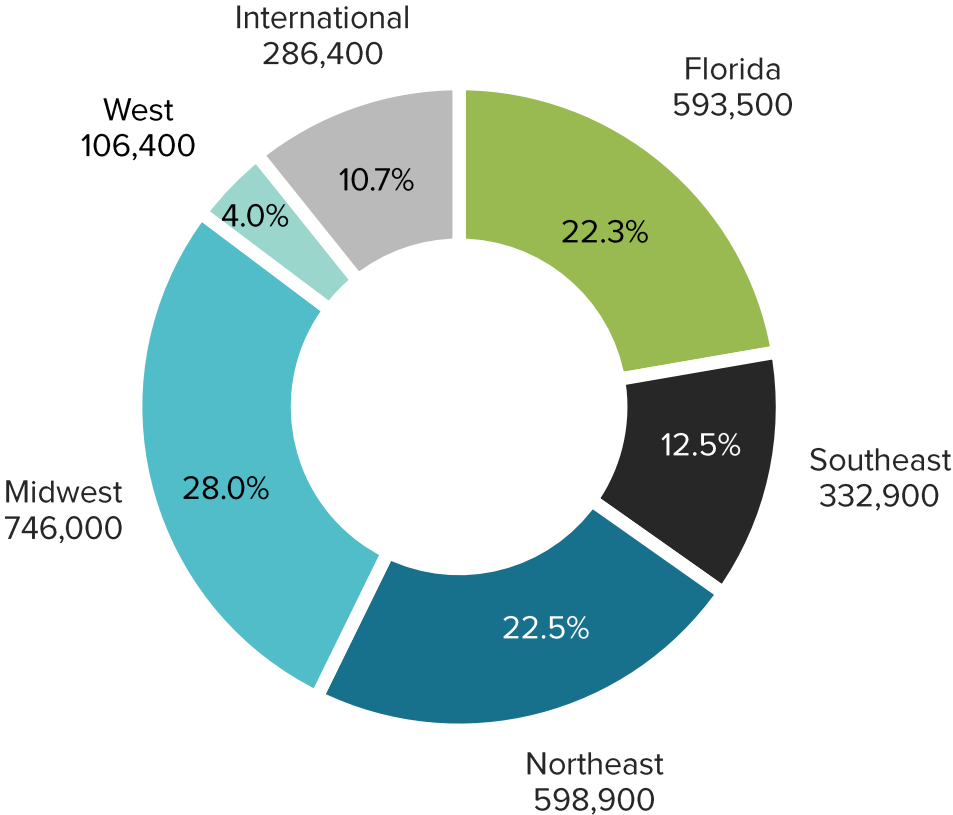


# FYTD 2025 | TOURISM METRICS

Metric	FYTD 2024	FYTD 2025	Percent Change
Visitors	2,625,300	2,664,100	+ 1.5%
Visitor Days	16,268,000	17,518,000	+ 7.7%
Direct Spending	\$2,781,254,800	\$2,773,474,900	- 0.3%
Economic Impact	\$3,856,011,900	\$3,833,452,400	- 0.6%
Room Nights	2,578,800	2,665,100	+ 3.3%
Occupancy	60.1%	60.8%	+ 1.2%
Average Daily Rate	\$365.61	\$349.74	- 4.3%
RevPAR	\$219.61	\$212.51	- 3.2%

# FYTD 2025 | VISITOR ORIGIN REGIONS

Region	FYTD 2024		FYTD 2025		Percent Change (±Δ%)	
	# Visitors	% Share	# Visitors	% Share	# Visitors	% Share
Domestic	2,307,700	87.9%	2,377,700	89.3%	+ 3.0%	+ 1.5%
Florida	609,100	23.2%	593,500	22.3%	- 2.6%	- 4.0%
Southeast	317,600	12.1%	332,900	12.5%	+ 4.8%	+ 3.3%
Northeast	559,500	21.3%	598,900	22.5%	+ 7.0%	+ 5.5%
Midwest	696,400	26.5%	746,000	28.0%	+ 7.1%	+ 5.6%
West	125,100	4.8%	106,400	4.0%	- 14.9%	- 16.2%
International	317,600	12.1%	286,400	10.7%	- 9.8%	- 11.1%
Canada	114,300	4.4%	111,400	4.2%	- 2.5%	- 4.0%
Europe	140,200	5.3%	120,900	4.5%	- 13.8%	- 15.0%
C/S America	35,800	1.4%	31,700	1.2%	- 11.5%	- 12.7%
Other	27,300	1.0%	22,400	0.8%	- 17.9%	- 19.1%
Total	2,625,300	100.0%	2,664,100	100.0%	+ 1.5%	



## Highlights

- Disparity between Visitation, Visitor Days, and Room Nights is due to an increase in the average length of stay.
- Hotel Industry Trends in August 2025 in Collier County:
  - Hotel Room Demand increased 9.1% year-over-year.
  - Hotel Average Daily Rate (ADR) & Hotel Revenue Per Available Room (RevPAR) again ranked second in the competitive set, behind only the Florida Keys.
  - Hotel Occupancy was 55.4%, down 1.1% year-over-year, while Hotel Room Supply was up 10.3%.
  - Hotel Leisure Demand increased 13.0% compared to August 2024.
- In August 2025, the median visitor was slightly older and had a significantly higher annual household income than the median visitor in August 2024.

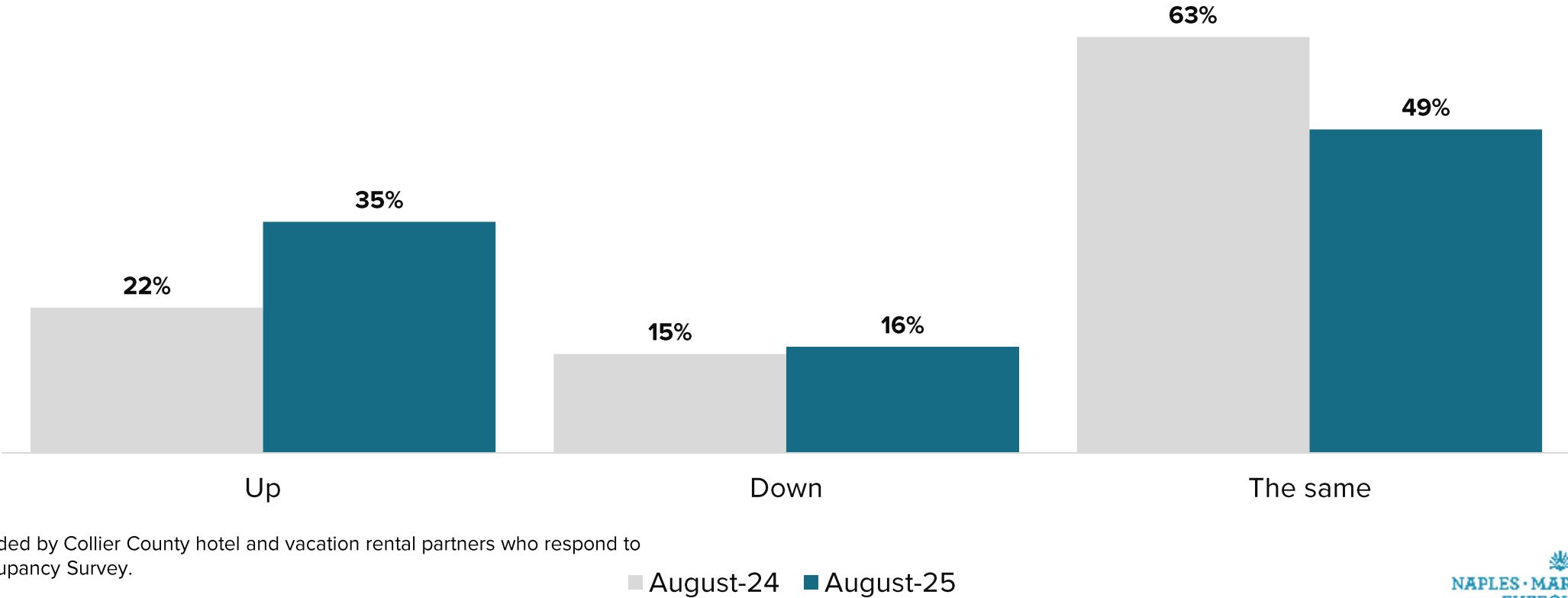
## Potential Areas of Concern

- Hotel Group Demand was down 5.0% in August 2025, the fifth consecutive month of Group Demand declining year-over-year.



# 3-MONTH FORECAST<sup>1</sup> | SEPTEMBER - NOVEMBER

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



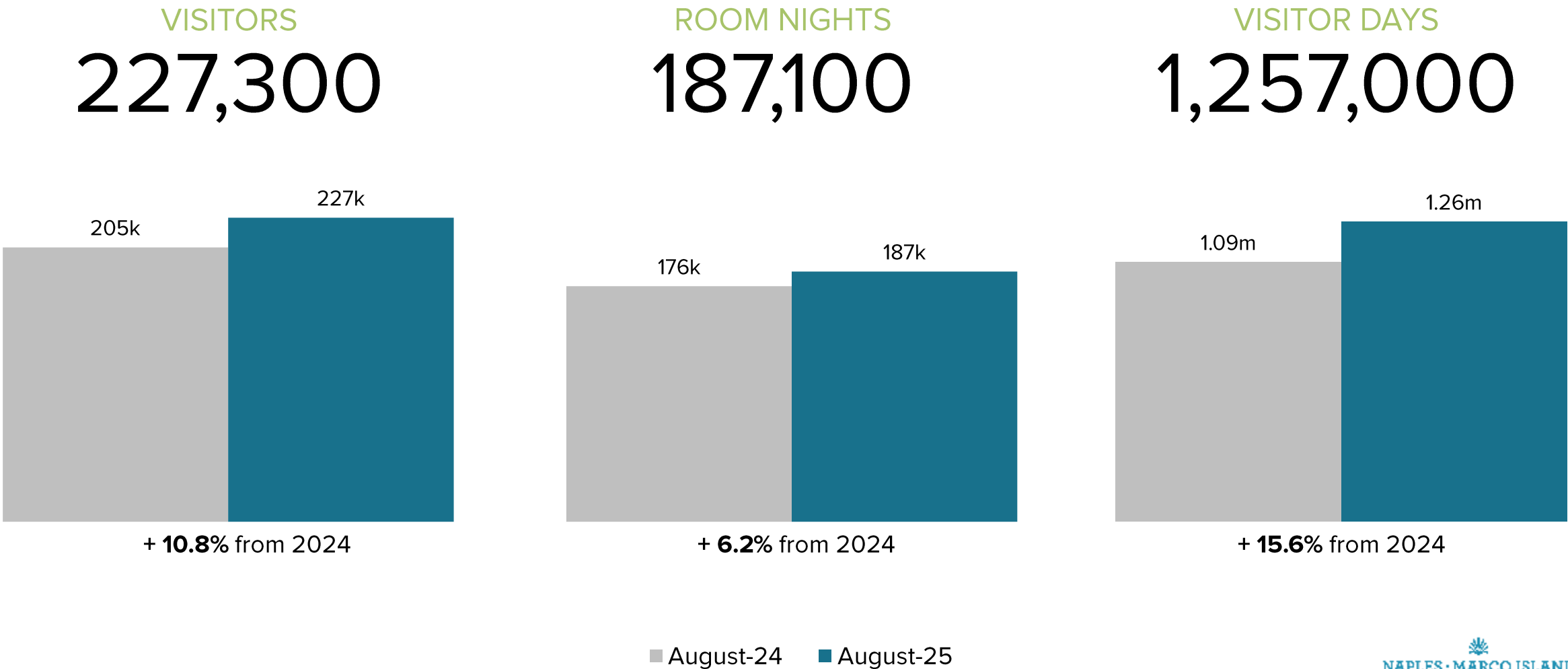
<sup>1</sup>Source: Data provided by Collier County hotel and vacation rental partners who respond to DSG's Monthly Occupancy Survey.

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.



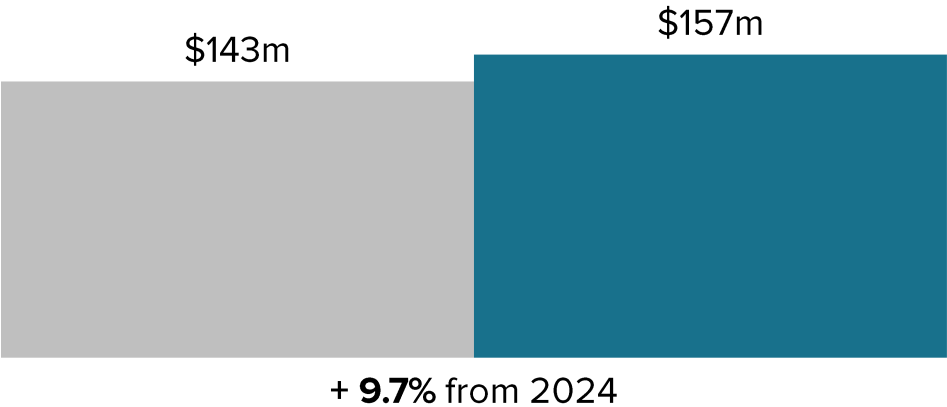
# 2

## EXECUTIVE MONTHLY SUMMARY



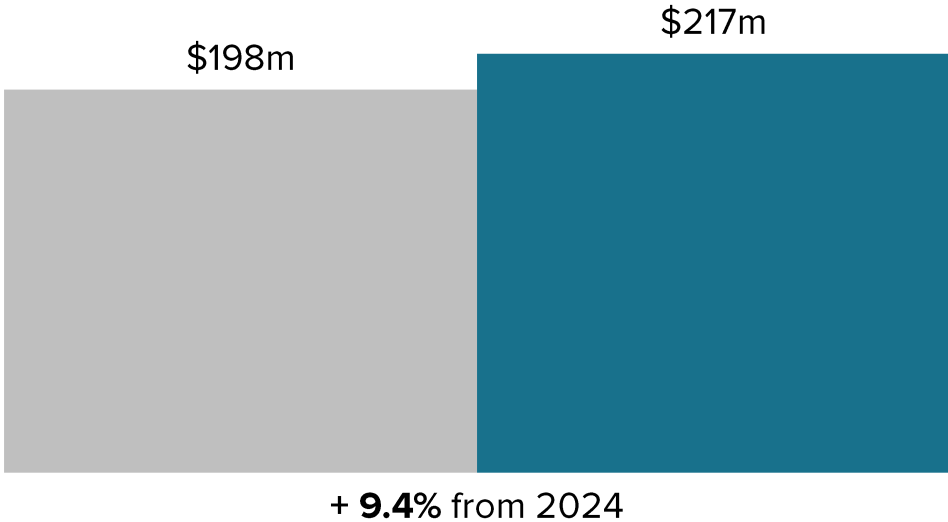
DIRECT SPENDING

\$156,784,600



ECONOMIC IMPACT

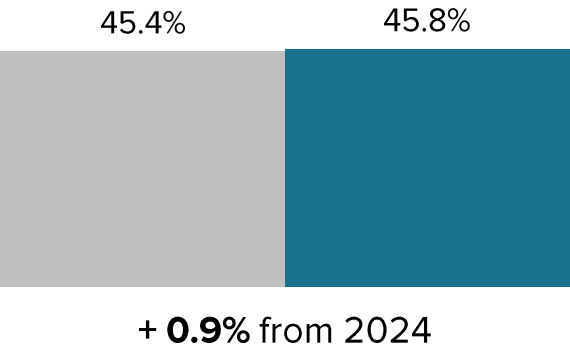
\$216,676,300



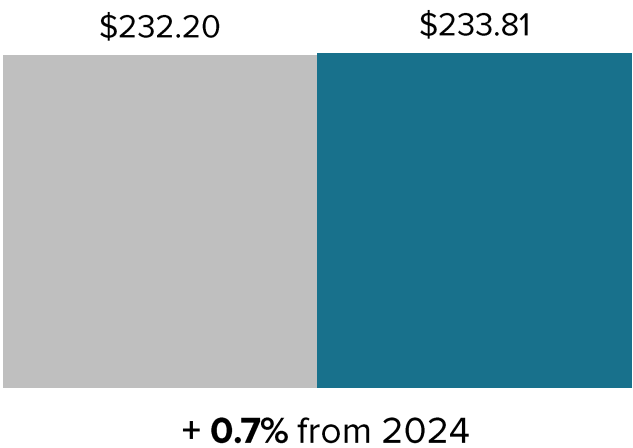
■ August-24 ■ August-25

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

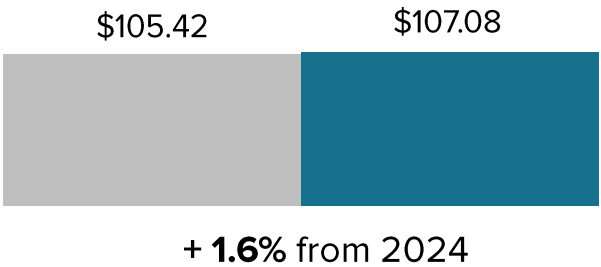
OCCUPANCY RATE  
**45.8%**



AVERAGE DAILY RATE  
**\$233.81**



REVENUE PER AVAILABLE ROOM  
**\$107.08**



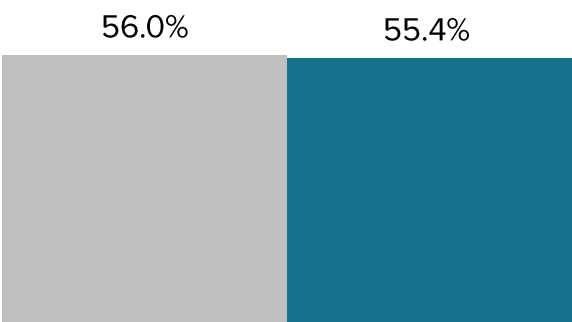
■ August-24 ■ August-25

<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.



OCCUPANCY RATE

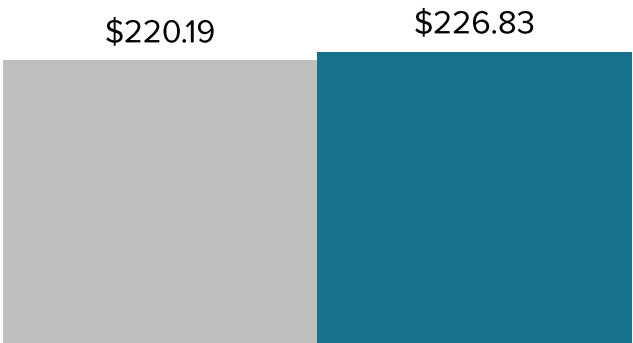
55.4%



- 1.1% from 2024

AVERAGE DAILY RATE

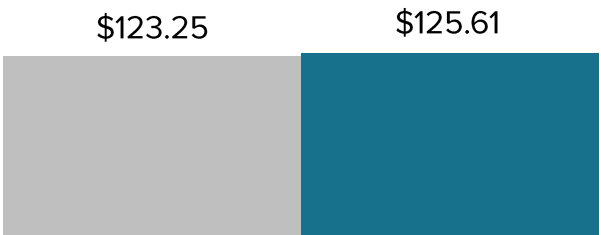
\$226.83



+ 3.0% from 2024

REVENUE PER AVAILABLE ROOM

\$125.61



+ 1.9% from 2024

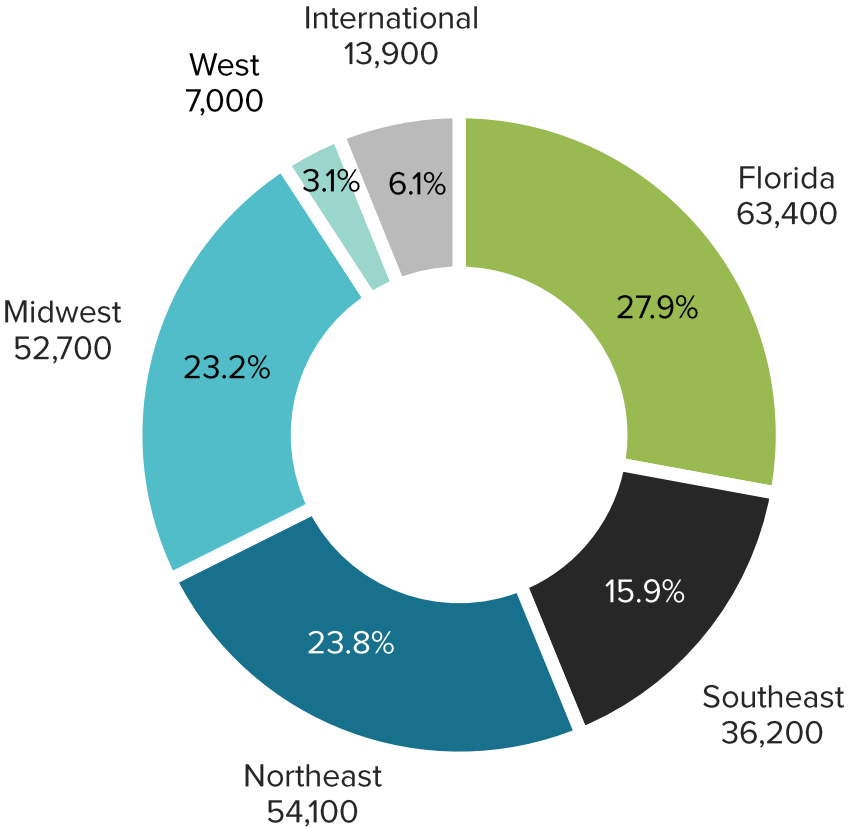
<sup>1</sup>Source: STR data

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

■ August-24 ■ August-25

# AUGUST 2025 | VISITOR ORIGIN REGIONS

	August 2024		August 2025		Percent Change (±Δ%)	
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Domestic	190,700	92.9%	213,400	93.9%	+ 11.9%	+ 1.0%
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International	14,500	7.1%	13,900	6.1%	- 4.1%	- 13.7%
Canada	3,900	1.9%	4,300	1.9%	+ 10.3%	-
Europe	8,000	3.9%	7,300	3.2%	- 8.8%	- 17.9%
C/S America	1,000	0.5%	1,800	0.8%	+ 80.0%	+ 64.2%
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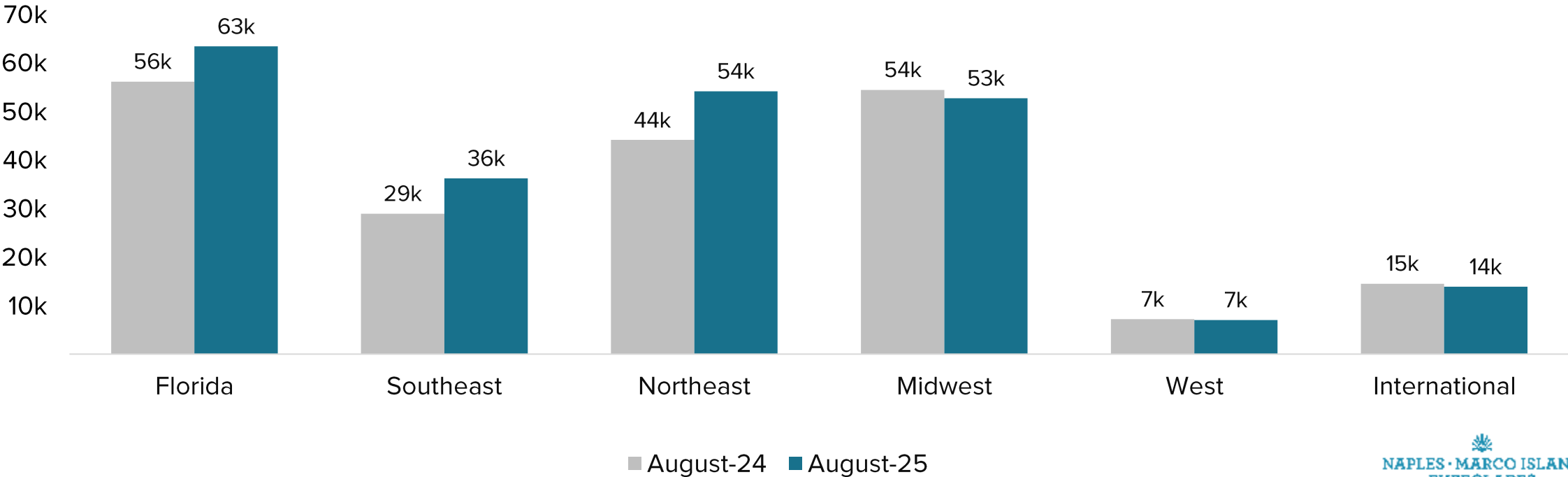


FLORIDA VISITORS

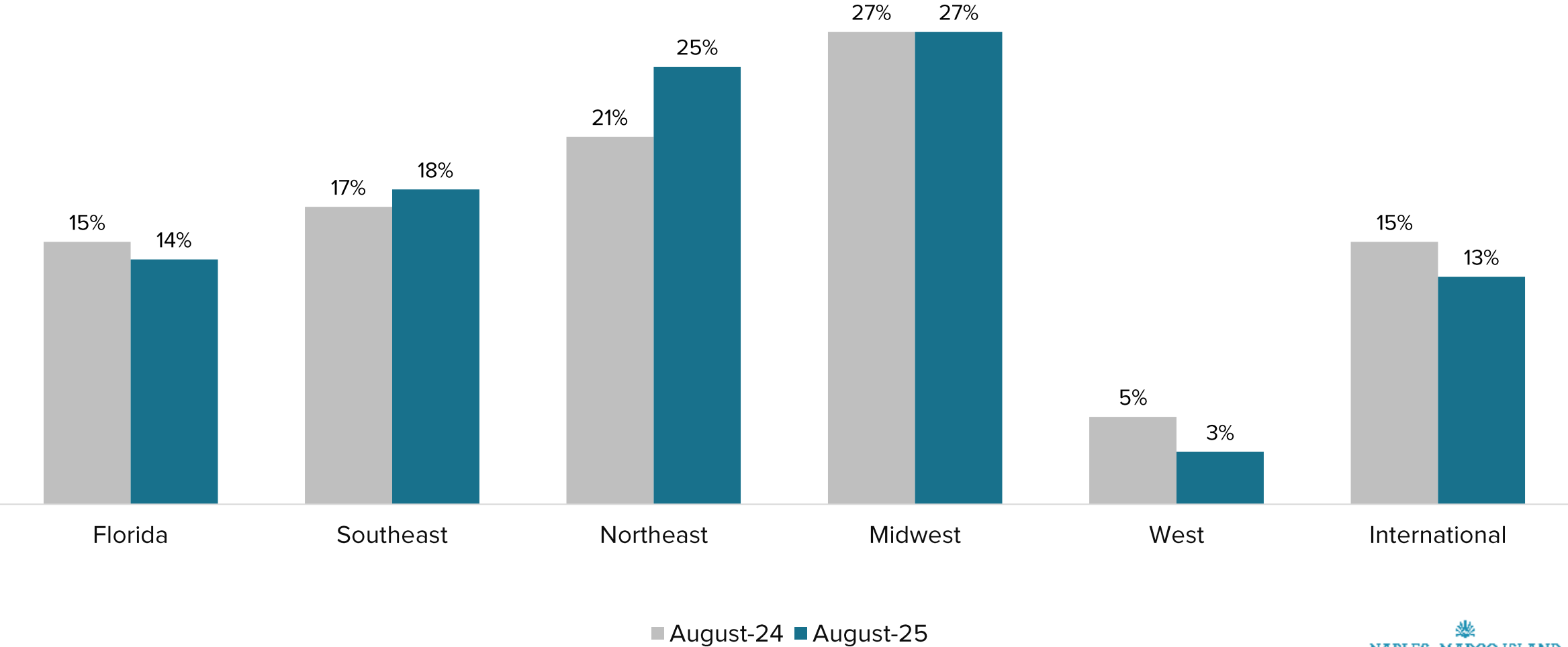
63,400

OUT-OF-STATE VISITORS

163,900



# AUGUST 2025 | OVERNIGHT VISITOR ORIGINS

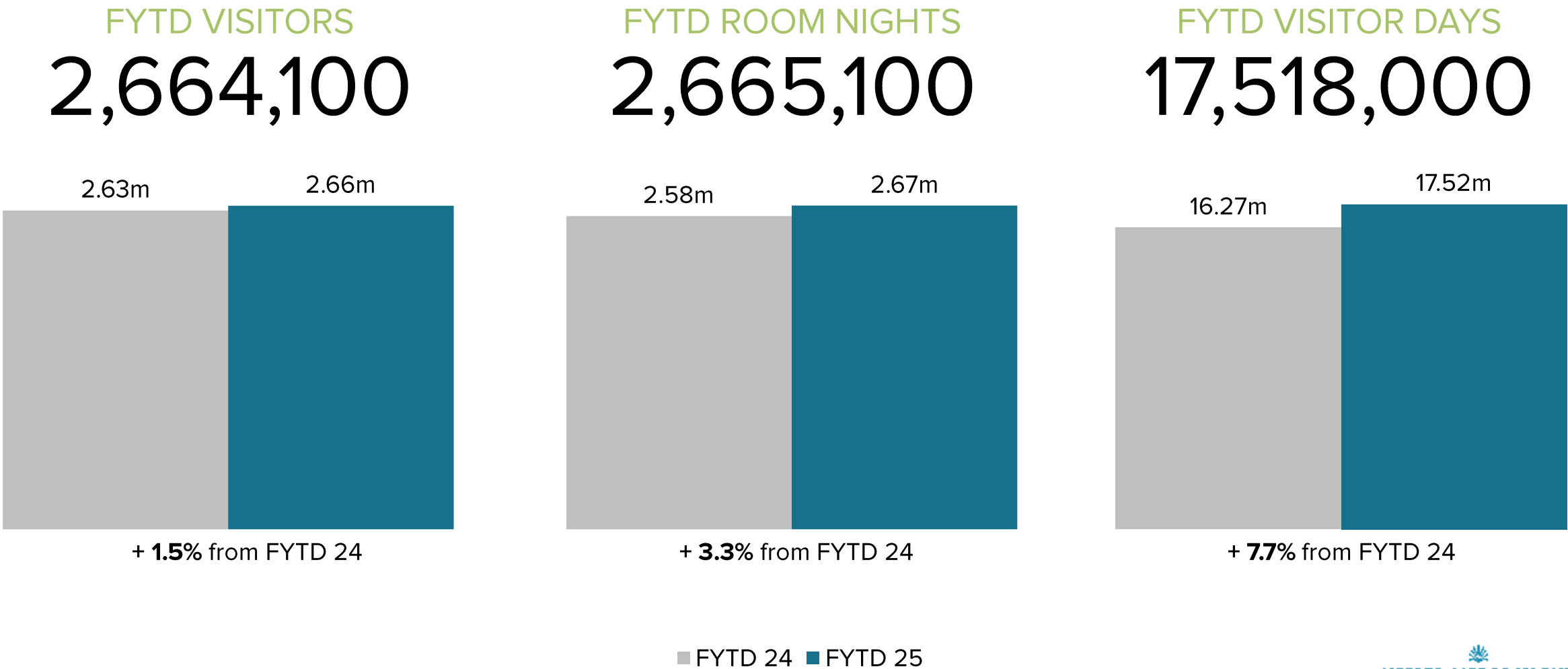




# 3

## EXECUTIVE FISCAL YEAR-TO-DATE (FYTD) SUMMARY

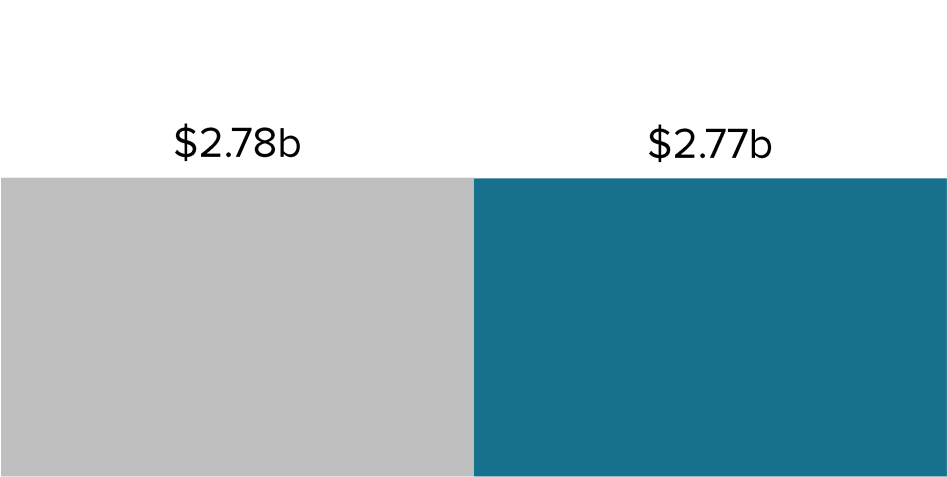




FYTD DIRECT SPENDING

\$2,773,474,900

- 0.3% from FYTD 24



FYTD ECONOMIC IMPACT

\$3,833,452,400

- 0.6% from FYTD 24<sup>1</sup>



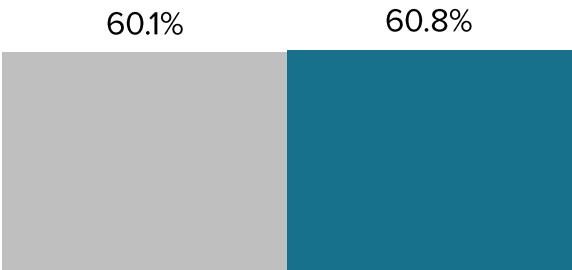
<sup>1</sup>The IMPLAN multiplier for Collier County was 1.386 for 2024 and is 1.382 in 2025.

■ FYTD 24 ■ FYTD 25

# FYTD 2025 | OVERALL LODGING METRICS<sup>1,2</sup>

## OCCUPANCY RATE

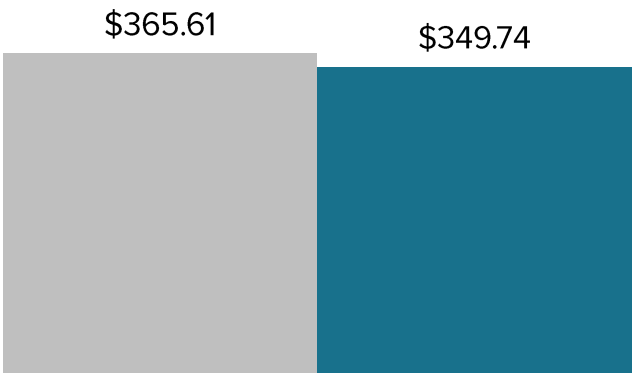
60.8%



+ 1.2% from FYTD 24

## AVERAGE DAILY RATE

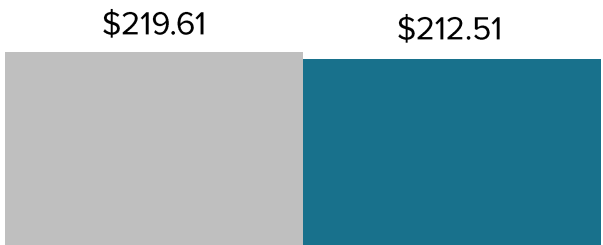
\$349.74



- 4.3% from FYTD 24

## REVENUE PER AVAILABLE ROOM

\$212.51



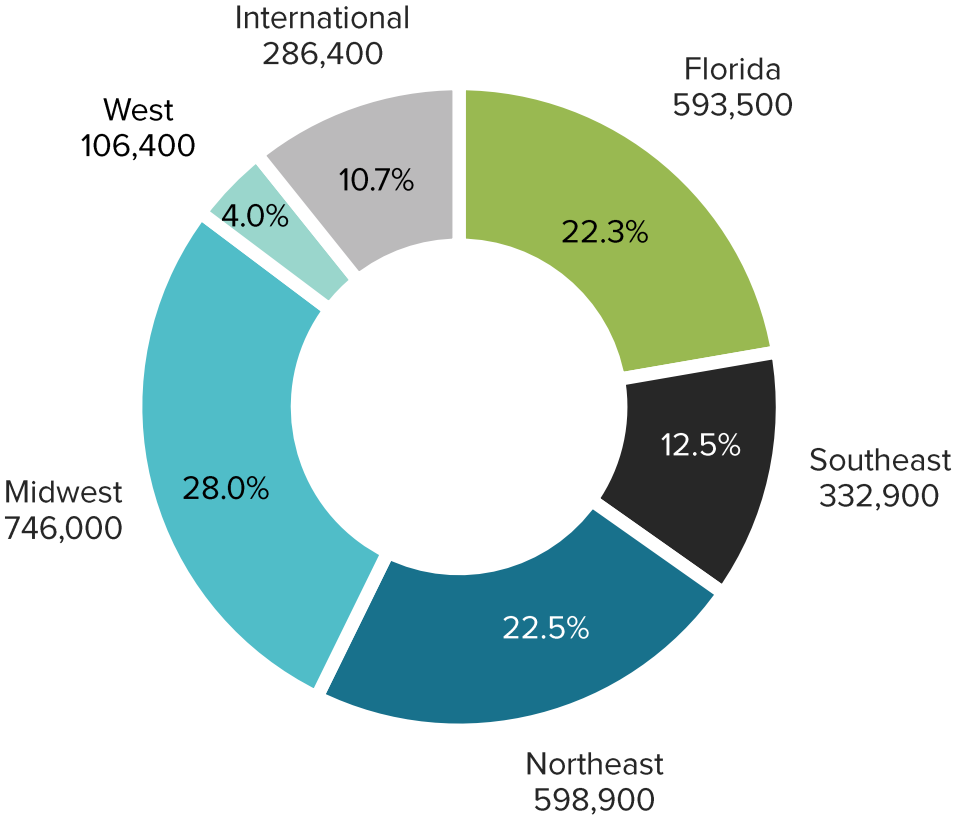
- 3.2% from FYTD 24

<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.

# FYTD 2025 | VISITOR ORIGIN REGIONS

Region	FYTD 2024		FYTD 2025		Percent Change (±Δ%)	
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Florida	609,100	23.2%	593,500	22.3%	- 2.6%	- 4.0%
Southeast	317,600	12.1%	332,900	12.5%	+ 4.8%	+ 3.3%
Northeast	559,500	21.3%	598,900	22.5%	+ 7.0%	+ 5.5%
Midwest	696,400	26.5%	746,000	28.0%	+ 7.1%	+ 5.6%
West	125,100	4.8%	106,400	4.0%	- 14.9%	- 16.2%
International	317,600	12.1%	286,400	10.7%	- 9.8%	- 11.1%
Canada	114,300	4.4%	111,400	4.2%	- 2.5%	- 4.0%
Europe	140,200	5.3%	120,900	4.5%	- 13.8%	- 15.0%
C/S America	35,800	1.4%	31,700	1.2%	- 11.5%	- 12.7%
Other	27,300	1.0%	22,400	0.8%	- 17.9%	- 19.1%
Total	2,625,300	100.0%	2,664,100	100.0%	+ 1.5%	







# 4a

MONTHLY  
DESTINATION  
COMPARISONS



# AUGUST 2025 COMPARISONS | SUPPLY

	Hotel Supply (Rooms)	Δ% in Supply from August 2024
	Total	Total
Miami	1,999,748	- 1.1%
Ft. Lauderdale	1,203,048	- 0.6%
Palm Beach	599,447	+ 1.4%
Ft. Myers	404,271	+ 11.1%
Sarasota	390,290	- 1.1%
Florida Keys	332,661	+ 2.2%
St. Petersburg	324,911	- 10.0%
Clearwater	285,293	+ 1.4%
Naples	263,996	+ 10.3%

<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.

# AUGUST 2025 COMPARISONS | DEMAND

	Hotel Demand (Rooms)				Δ% in Demand from August 2024			
	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	1,171,491	118,492	87,870	1,377,853	- 0.8%	+ 8.0%	+ 10.7%	+ 0.6%
Ft. Lauderdale	671,666	93,170	21,162	785,998	- 1.7%	+ 25.1%	+ 5.2%	+ 1.1%
Palm Beach	304,524	47,348	8,337	360,208	+ 3.6%	- 14.1%	+ 20.6%	+ 1.2%
Sarasota	205,264	16,861	11,404	233,529	+ 1.2%	- 29.9%	+ 165.0%	+ 1.0%
Florida Keys	205,154	12,846	716	218,716	+ 5.4%	- 12.9%	- 65.8%	+ 3.4%
Ft. Myers	177,049	11,555	12,041	200,645	+ 11.4%	- 34.5%	+ 44.0%	+ 8.5%
St. Petersburg	168,216	26,683	1,581	196,480	- 5.8%	- 21.1%	+ 17.1%	- 8.1%
Clearwater	161,531	21,278	0	182,809	+ 0.7%	+ 3.8%	-	+ 1.1%
Naples	119,962	26,229	0	146,191	+ 13.0%	- 5.1%	- 100.0%	+ 9.1%

<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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# AUGUST 2025 COMPARISONS | OCCUPANCY

	Hotel Occupancy (%)				Δ% in Occupancy from August 2024			
	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	58.6%	5.9%	4.4%	68.9%	+ 0.4%	+ 9.2%	+ 12.0%	+ 1.7%
Florida Keys	61.7%	3.9%	0.2%	65.7%	+ 3.1%	- 14.8%	- 66.6%	+ 1.1%
Ft. Lauderdale	55.8%	7.7%	1.8%	65.3%	- 1.0%	+ 25.9%	+ 5.8%	+ 1.7%
Clearwater	56.6%	7.5%	0.0%	64.1%	- 0.6%	+ 2.4%	0.0%	- 0.3%
St. Petersburg	51.8%	8.2%	0.5%	60.5%	+ 4.6%	- 12.4%	+ 30.1%	+ 2.1%
Palm Beach	50.8%	7.9%	1.4%	60.1%	+ 2.2%	- 15.3%	+ 19.0%	- 0.2%
Sarasota	52.6%	4.3%	2.9%	59.8%	+ 2.4%	- 29.2%	+ 168.0%	+ 2.2%
Naples	45.4%	9.9%	0.0%	55.4%	+ 2.4%	- 14.0%	- 100.0%	- 1.1%
Ft. Myers	43.8%	2.9%	3.0%	49.6%	+ 0.3%	- 41.1%	+ 29.7%	- 2.4%

<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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# AUGUST 2025 COMPARISONS | REVENUE

	Hotel Revenue (Millions of Dollars)				Δ% in Revenue from August 2024			
	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	\$194.11	\$19.34	\$10.56	\$224.00	+ 2.2%	+ 9.9%	+ 11.4%	+ 3.2%
Ft. Lauderdale	\$89.89	\$13.80	\$2.24	\$105.94	- 0.5%	+ 27.7%	- 2.6%	+ 2.4%
Palm Beach	\$53.27	\$9.13	\$0.87	\$63.26	+ 7.0%	- 4.9%	+ 23.2%	+ 5.3%
Florida Keys	\$51.13	\$3.36	\$0.13	\$54.63	+ 2.8%	- 8.2%	- 70.3%	+ 1.5%
Sarasota	\$33.69	\$2.34	\$1.33	\$37.36	+ 13.6%	- 23.2%	+ 190.7%	+ 12.6%
Naples	\$27.27	\$5.89	\$0.00	\$33.16	+ 15.3%	+ 1.2%	- 100.0%	+ 12.4%
Clearwater	\$29.66	\$3.41	\$0.00	\$33.07	+ 7.4%	+ 15.9%	-	+ 8.2%
St. Petersburg	\$27.07	\$3.86	\$0.19	\$31.13	- 5.3%	- 17.5%	+ 54.8%	- 6.8%
Ft. Myers	\$23.65	\$1.45	\$1.35	\$26.44	+ 19.9%	- 34.4%	+ 53.7%	+ 15.9%

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

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# AUGUST 2025 COMPARISONS | DAILY RATE

	Hotel Average Daily Rate (\$)				Δ% in ADR from August 2024			
	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	\$249.23	\$261.92	\$186.77	\$249.77	- 2.4%	+ 5.4%	- 13.2%	- 1.8%
Naples	\$227.34	\$224.51	\$0.00	\$226.83	+ 2.0%	+ 6.7%	- 100.0%	+ 3.0%
Clearwater	\$183.62	\$160.19	\$0.00	\$180.89	+ 6.6%	+ 11.7%	0.0%	+ 7.1%
Palm Beach	\$174.94	\$192.73	\$103.80	\$175.63	+ 3.3%	+ 10.8%	+ 2.2%	+ 4.1%
Miami	\$165.69	\$163.21	\$120.15	\$162.57	+ 3.0%	+ 1.8%	+ 0.6%	+ 2.6%
Sarasota	\$164.13	\$138.87	\$116.36	\$159.97	+ 12.2%	+ 9.7%	+ 9.7%	+ 11.5%
St. Petersburg	\$160.92	\$144.80	\$122.57	\$158.42	+ 0.5%	+ 4.6%	+ 32.1%	+ 1.4%
Ft. Lauderdale	\$133.84	\$148.14	\$105.86	\$134.78	+ 1.2%	+ 2.1%	- 7.4%	+ 1.3%
Ft. Myers	\$133.55	\$125.47	\$111.70	\$131.77	+ 7.6%	+ 0.2%	+ 6.7%	+ 6.9%

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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.



# AUGUST 2025 COMPARISONS | REVPAR

	Hotel Revenue Per Available Room (\$)				Δ% in RevPAR from August 2024			
	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	\$153.70	\$10.11	\$0.40	\$164.22	+ 0.6%	- 10.2%	- 71.0%	- 0.7%
Naples	\$103.30	\$22.31	\$0.00	\$125.61	+ 4.5%	- 8.2%	- 100.0%	+ 1.9%
Clearwater	\$103.96	\$11.95	\$0.00	\$115.91	+ 5.9%	+ 14.3%	0.0%	+ 6.7%
Miami	\$97.07	\$9.67	\$5.28	\$112.02	+ 3.4%	+ 11.2%	+ 12.7%	+ 4.4%
Palm Beach	\$88.87	\$15.22	\$1.44	\$105.54	+ 5.6%	- 6.1%	+ 21.6%	+ 3.9%
St. Petersburg	\$83.31	\$11.89	\$0.60	\$95.80	+ 5.2%	- 8.4%	+ 71.9%	+ 3.5%
Sarasota	\$86.32	\$6.00	\$3.40	\$95.72	+ 14.9%	- 22.3%	+ 194.0%	+ 13.9%
Ft. Lauderdale	\$74.72	\$11.47	\$1.86	\$88.06	+ 0.1%	+ 28.5%	- 2.0%	+ 3.0%
Ft. Myers	\$58.49	\$3.59	\$3.33	\$65.40	+ 7.9%	- 41.0%	+ 38.4%	+ 4.3%

<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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# 4b

FISCAL YTD  
DESTINATION  
COMPARISONS



# FYTD 2025 COMPARISONS | SUPPLY

	Hotel Supply (Rooms)	%Δ in Supply from FYTD 2024
	Total	Total
Miami	21,802,318	- 0.2%
Ft. Lauderdale	13,022,526	- 0.6%
Palm Beach	6,469,264	+ 0.7%
Sarasota	4,201,444	+ 1.2%
Ft. Myers	4,194,406	+ 8.3%
Florida Keys	3,586,081	+ 1.6%
St. Petersburg	3,480,057	- 8.9%
Clearwater	3,042,792	- 0.1%
Naples	2,833,438	+ 12.1%

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

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# FYTD 2025 COMPARISONS | DEMAND

	Hotel Demand (Rooms)				%Δ in Demand from FYTD 2024			
	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	12,830,057	2,554,740	1,001,193	16,385,990	- 0.7%	+ 2.9%	+ 11.7%	+ 0.5%
Ft. Lauderdale	7,585,501	1,565,197	257,172	9,407,870	- 1.7%	+ 2.0%	- 16.3%	- 1.6%
Palm Beach	3,478,140	1,045,763	99,034	4,622,937	+ 2.7%	+ 17.4%	- 4.5%	+ 5.5%
Sarasota	2,413,252	501,609	88,426	3,003,287	+ 6.2%	+ 2.8%	+ 30.3%	+ 6.2%
Florida Keys	2,371,960	280,089	13,094	2,665,143	+ 2.2%	- 7.3%	+ 57.7%	+ 1.3%
Ft. Myers	2,038,662	428,406	195,248	2,662,316	+ 6.6%	+ 1.5%	+ 6.8%	+ 5.8%
St. Petersburg	1,959,511	559,721	42,150	2,561,382	- 2.7%	+ 2.6%	+ 75.7%	- 0.9%
Clearwater	1,799,845	510,037	185	2,310,067	+ 5.3%	+ 18.8%	- 1.9%	+ 8.0%
Naples	1,382,952	484,869	1,319	1,869,139	+ 16.3%	+ 1.6%	- 56.9%	+ 12.0%

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

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# FYTD 2025 COMPARISONS | OCCUPANCY

	Hotel Occupancy (%)				%Δ in Occupancy from FYTD 2024			
	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
Clearwater	59.2%	16.8%	0.0%	75.9%	+ 5.4%	+ 18.9%	- 1.8%	+ 8.1%
Miami	58.8%	11.7%	4.6%	75.2%	- 0.5%	+ 3.1%	+ 11.8%	+ 0.7%
Florida Keys	66.1%	7.8%	0.4%	74.3%	+ 0.6%	- 8.8%	+ 55.2%	- 0.3%
St. Petersburg	56.3%	16.1%	1.2%	73.6%	+ 6.8%	+ 12.7%	+ 92.9%	+ 8.8%
Ft. Lauderdale	58.2%	12.0%	2.0%	72.2%	- 1.1%	+ 2.6%	- 15.7%	- 1.0%
Sarasota	57.4%	11.9%	2.1%	71.5%	+ 5.0%	+ 1.6%	+ 28.8%	+ 5.0%
Palm Beach	53.8%	16.2%	1.5%	71.5%	+ 2.0%	+ 16.5%	- 5.2%	+ 4.8%
Naples	48.8%	17.1%	0.0%	66.0%	+ 3.8%	- 9.4%	- 61.6%	- 0.1%
Ft. Myers	48.6%	10.2%	4.7%	63.5%	- 1.6%	- 6.3%	- 1.4%	- 2.4%

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# FYTD 2025 COMPARISONS | REVENUE

	Hotel Revenue (Millions of Dollars)				%Δ in Revenue from FYTD 2024			
	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	\$2,961.30	\$683.96	\$132.35	\$3,777.60	+ 1.5%	+ 7.8%	+ 18.9%	+ 3.1%
Ft. Lauderdale	\$1,361.67	\$338.35	\$35.72	\$1,735.73	- 2.2%	+ 1.1%	- 14.0%	- 1.8%
Palm Beach	\$953.92	\$293.09	\$13.64	\$1,260.65	+ 9.6%	+ 19.5%	+ 2.6%	+ 11.7%
Florida Keys	\$844.46	\$100.85	\$5.64	\$950.95	- 0.8%	- 6.3%	+ 94.0%	- 1.2%
Sarasota	\$513.48	\$104.87	\$13.36	\$631.71	+ 11.7%	+ 15.2%	+ 55.3%	+ 12.9%
Naples	\$465.18	\$154.60	\$0.35	\$620.12	+ 10.8%	+ 5.9%	- 48.6%	+ 9.5%
St. Petersburg	\$384.46	\$100.69	\$5.34	\$490.49	- 3.7%	+ 5.2%	+ 109.8%	- 1.4%
Clearwater	\$386.13	\$102.28	\$0.00	\$488.41	+ 8.5%	+ 27.6%	- 11.7%	+ 12.0%
Ft. Myers	\$356.83	\$78.74	\$30.13	\$465.71	+ 9.1%	+ 1.2%	+ 13.2%	+ 7.9%

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

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# FYTD 2025 COMPARISONS | DAILY RATE

	Hotel Average Daily Rate (\$)				%Δ in ADR from FYTD 2024			
	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	\$356.02	\$360.06	\$430.47	\$356.81	- 3.0%	+ 1.1%	+ 23.0%	- 2.4%
Naples	\$336.36	\$318.84	\$262.11	\$331.77	- 4.7%	+ 4.2%	+ 19.3%	- 2.2%
Palm Beach	\$274.26	\$280.26	\$137.74	\$272.69	+ 6.8%	+ 1.8%	+ 7.4%	+ 5.9%
Miami	\$230.81	\$267.72	\$132.19	\$230.54	+ 2.2%	+ 4.7%	+ 6.5%	+ 2.6%
Clearwater	\$214.53	\$200.53	\$6.70	\$211.43	+ 3.0%	+ 7.4%	- 10.0%	+ 3.7%
Sarasota	\$212.77	\$209.06	\$151.13	\$210.34	+ 5.2%	+ 12.1%	+ 19.2%	+ 6.3%
St. Petersburg	\$196.20	\$179.89	\$126.59	\$191.49	- 1.0%	+ 2.5%	+ 19.4%	- 0.5%
Ft. Lauderdale	\$179.51	\$216.17	\$138.88	\$184.50	- 0.5%	- 0.9%	+ 2.7%	- 0.3%
Ft. Myers	\$175.03	\$183.81	\$154.34	\$174.93	+ 2.3%	- 0.3%	+ 6.0%	+ 2.0%

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

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# FYTD 2025 COMPARISONS | REVPAR

	Hotel Revenue Per Available Room (\$)				%Δ in RevPAR from FYTD 2024			
	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	\$235.48	\$28.12	\$1.57	\$265.18	- 2.4%	- 7.8%	+ 90.9%	- 2.8%
Naples	\$164.17	\$54.56	\$0.12	\$218.86	- 1.2%	- 5.6%	- 54.2%	- 2.4%
Palm Beach	\$147.45	\$45.30	\$2.11	\$194.87	+ 8.9%	+ 18.7%	+ 1.8%	+ 10.9%
Miami	\$135.82	\$31.37	\$6.07	\$173.27	+ 1.7%	+ 7.9%	+ 19.1%	+ 3.3%
Clearwater	\$126.90	\$33.61	\$0.00	\$160.51	+ 8.6%	+ 27.7%	- 11.6%	+ 12.1%
Sarasota	\$122.21	\$24.96	\$3.18	\$150.35	+ 10.4%	+ 13.9%	+ 53.5%	+ 11.6%
St. Petersburg	\$110.48	\$28.93	\$1.53	\$140.94	+ 5.8%	+ 15.5%	+ 130.3%	+ 8.3%
Ft. Lauderdale	\$104.56	\$25.98	\$2.74	\$133.29	- 1.6%	+ 1.8%	- 13.5%	- 1.2%
Ft. Myers	\$85.07	\$18.77	\$7.18	\$111.03	+ 0.7%	- 6.6%	+ 4.5%	- 0.4%

<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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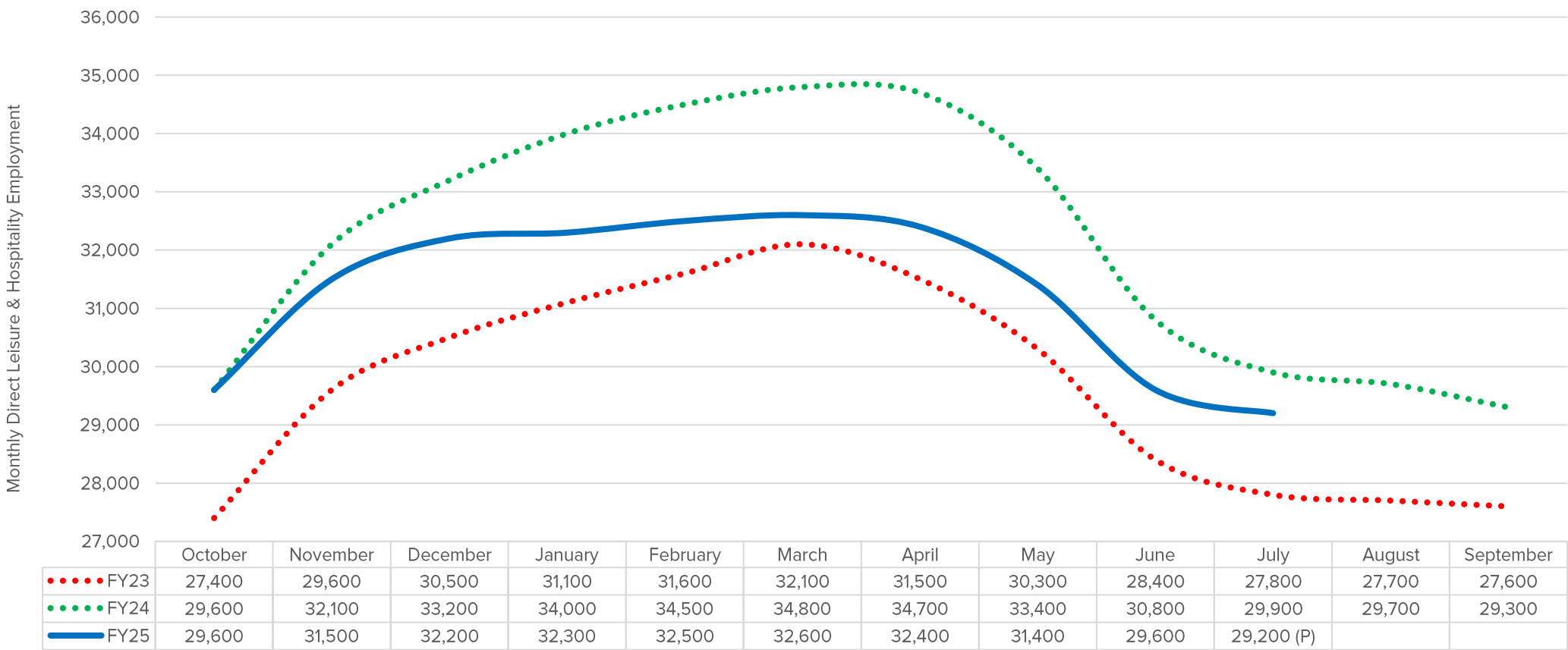
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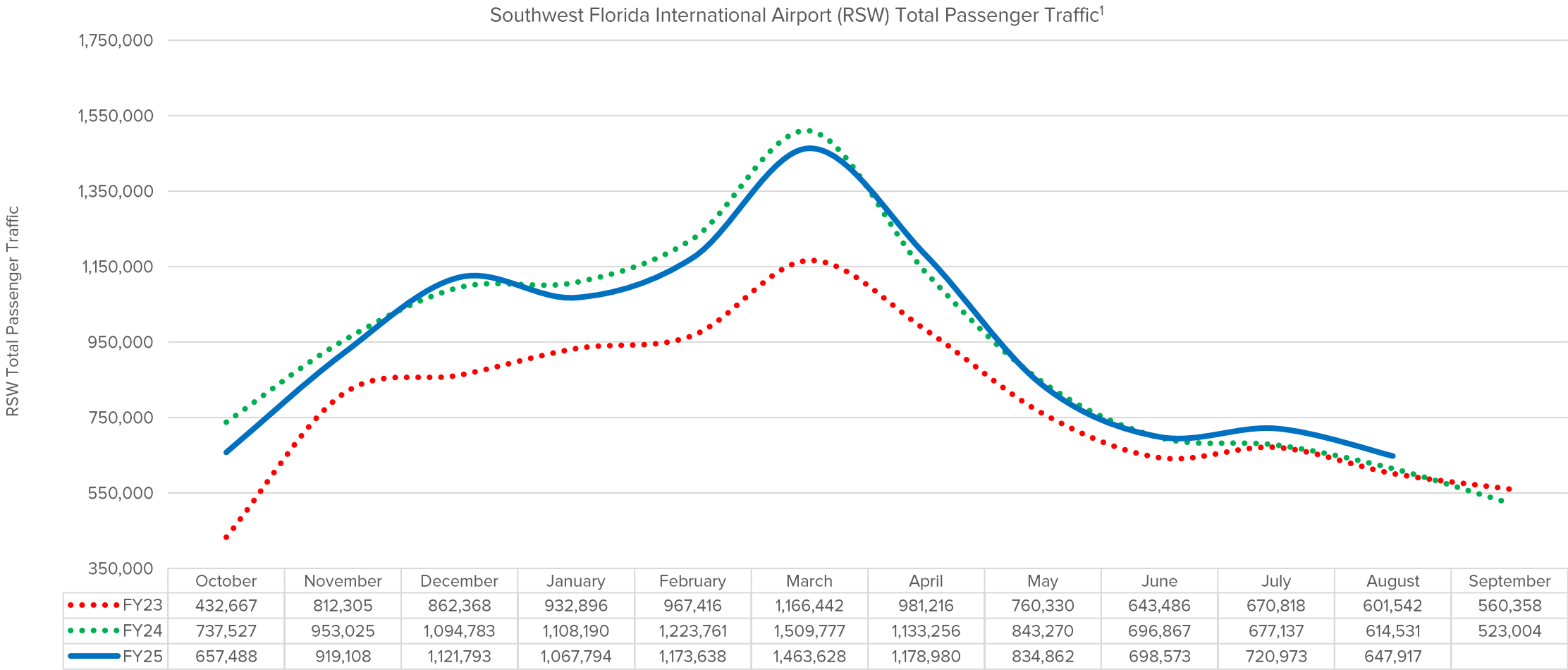
5

INDUSTRY  
DATA

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



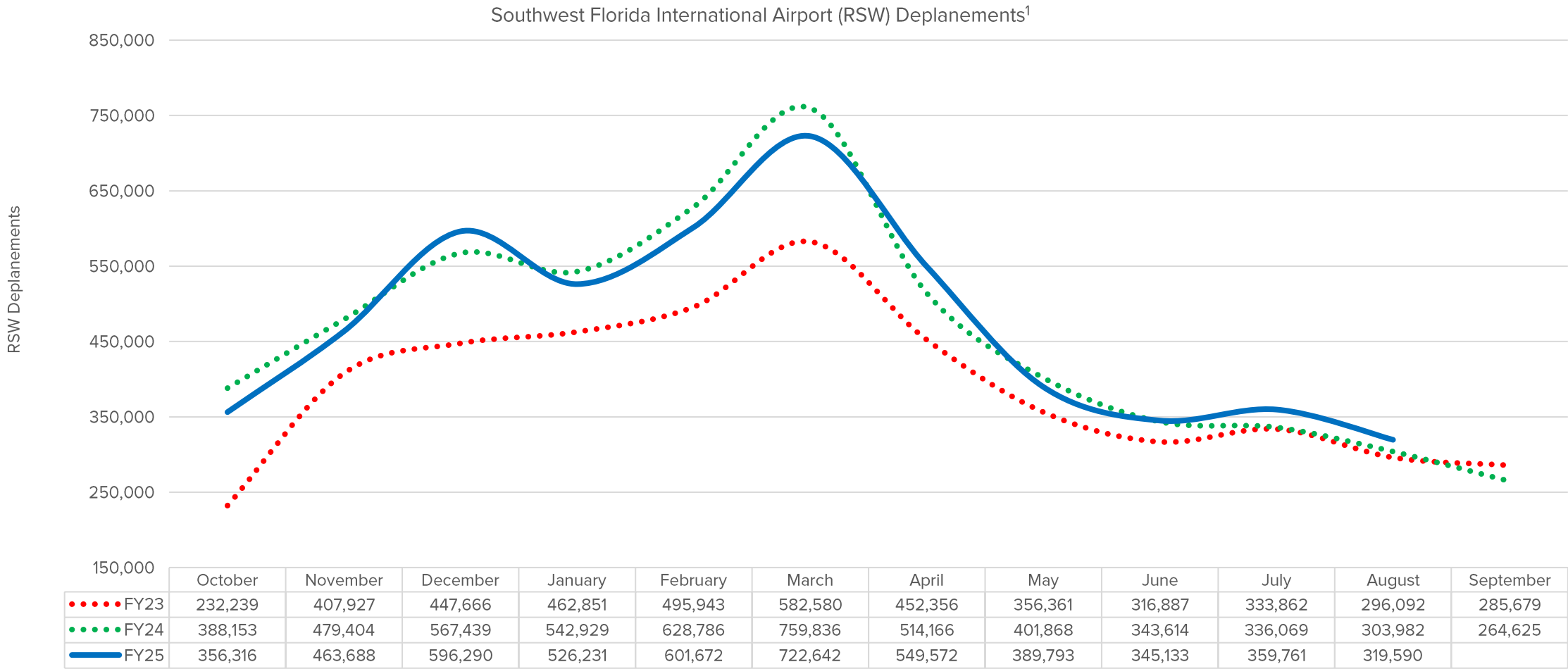
<sup>1</sup>SOURCE: Current Employment Statistic Program (CES), Collier County Leisure and Hospitality Sector, not seasonally adjusted.  
(P) Preliminary.



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

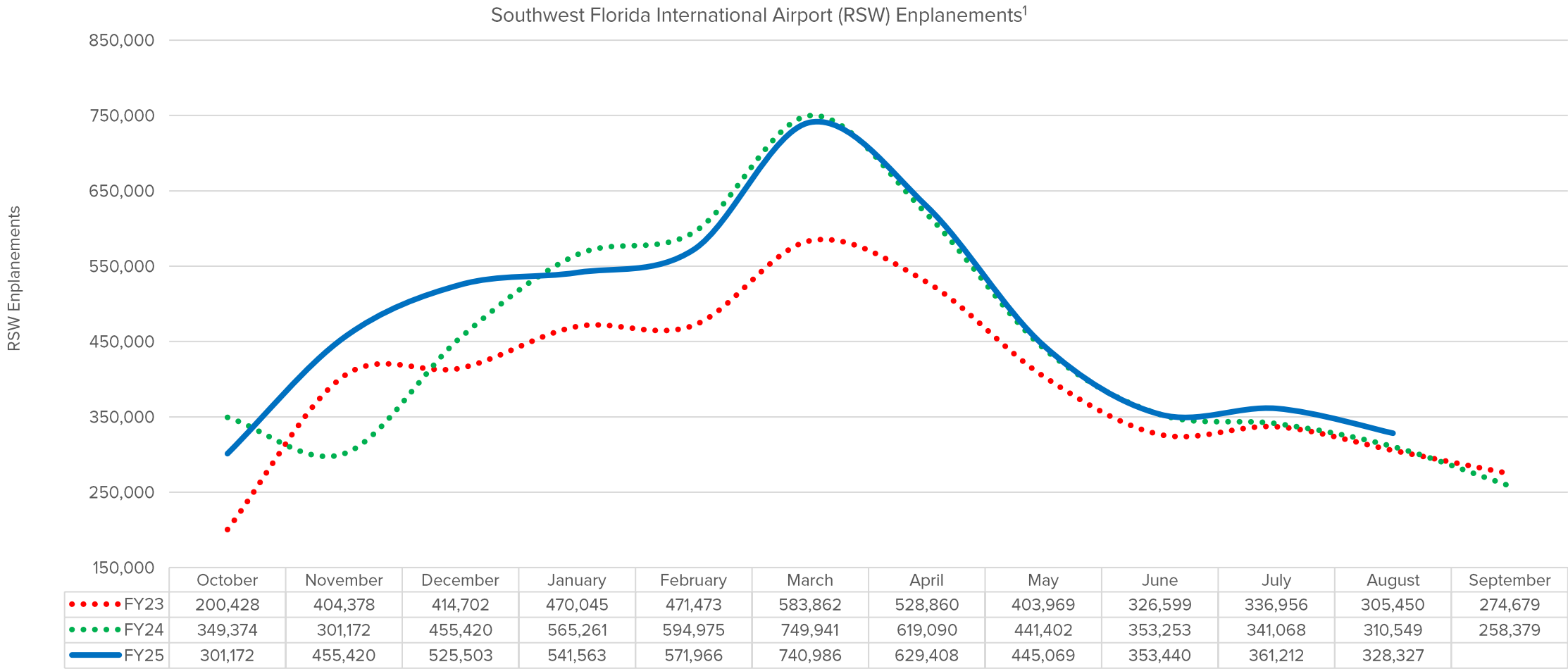


# INDUSTRY DATA | RSW INFLOW (DEPLANEMENTS)



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

# INDUSTRY DATA | RSW OUTFLOW (ENPLANEMENTS)



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

Licensed Transient Rental Units as of September 1 <sup>st</sup> , 2025 <sup>1</sup>				
	Hotel	Motel	Vacation Rental	Total
Naples	5,473	1,256	3,351	10,080
Marco Island	1,275	121	2,093	3,489
Immokalee	0	70	106	176
Everglades City	38	36	8	82
Goodland	0	0	31	31
Chokoloskee	0	13	1	14
Ave Maria	0	0	3	3
<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

August 2025 Monthly Visitor Dashboard