



2025-2026 Tourism Update

Collier County Board of County Commissioners
October 28, 2025

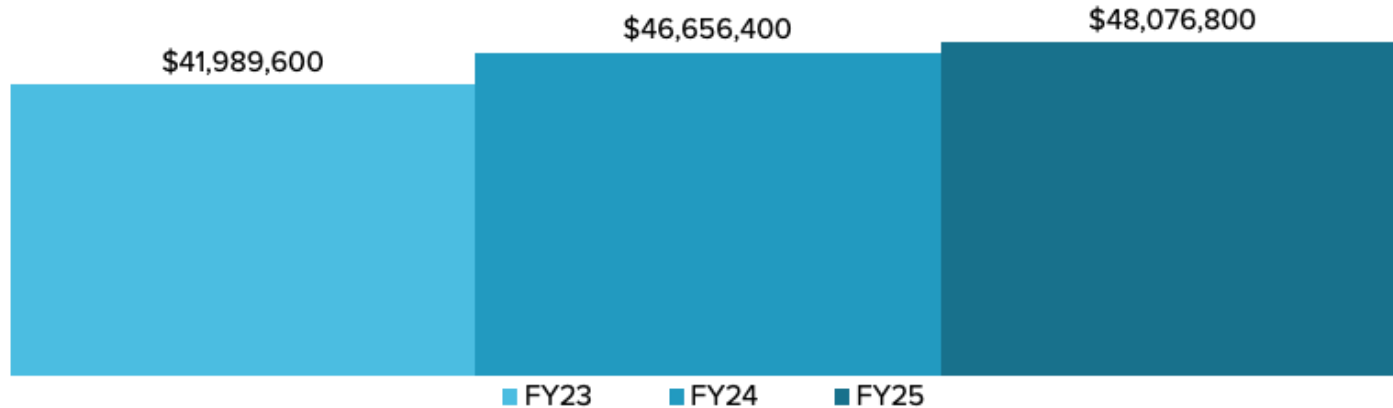


October - August | TDT Collections Supported^{1,2}

TDT COLLECTIONS

\$48,076,800

(+14.5% from FY23 & +3.0% from FY24)



¹ Reflective of TDT Collections that were driven by tourism activity in October 2024 through August 2025, even though the collection/remittance of the taxes themselves to Collier County took place in November 2024 through September 2025.

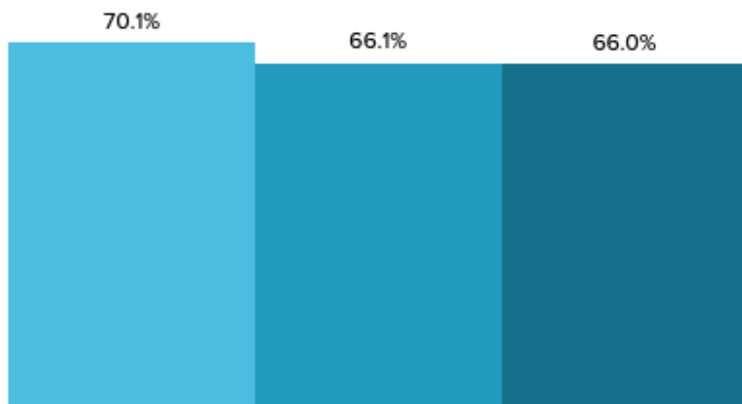
² Tourism in September usually supports roughly \$2m in TDT Collections and has been the lowest TDT producing month in each of the past three fiscal years. (\$2.105m in FY23 & \$1.980m in FY24)

October - August | Hotel Occupancy & Hotel ADR¹

HOTEL OCCUPANCY RATE

66.0%

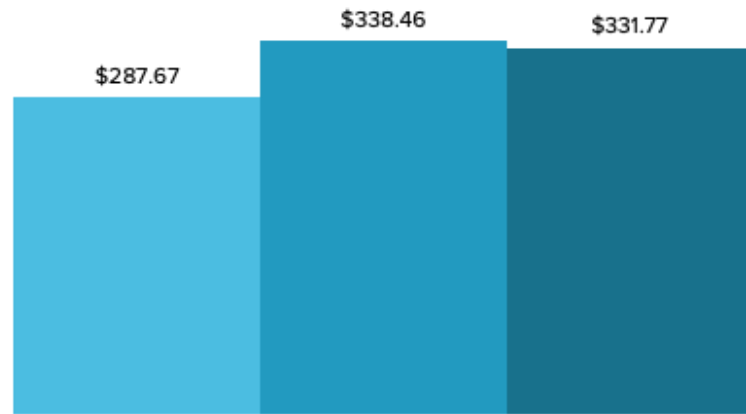
(-5.8% from FY23 & -0.1% from FY24)



HOTEL AVERAGE DAILY RATE (ADR)

\$331.77

(+15.3% from FY23 & -2.2% from FY24)



■ FY23 ■ FY24 ■ FY25

October - August | Competitive Set Hotel Metrics (FY25)¹

Market	Occupancy	ADR	RevPAR
Florida Keys	74.3%	\$356.81	\$265.18
Naples	66.0%	\$331.77	\$218.86
Palm Beach	71.5%	\$272.69	\$194.87
Miami	75.2%	\$230.54	\$173.27
Clearwater	75.9%	\$211.43	\$160.51
Sarasota	71.5%	\$210.34	\$150.35
St. Petersburg	73.6%	\$191.49	\$140.94
Ft. Lauderdale	72.2%	\$184.50	\$133.29
Ft. Myers	63.5%	\$174.93	\$111.03

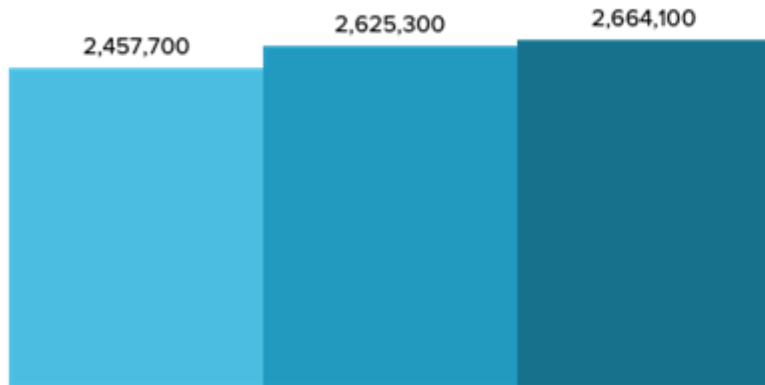
¹Metrics provided by STR

October - August | Total Visitation & Direct Spending

TOTAL VISITATION

2,664,100

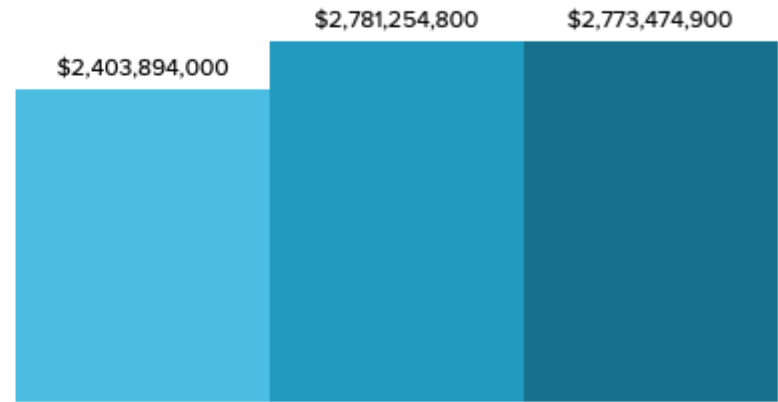
(+8.4% from FY23 & +1.5% from FY24)



DIRECT SPENDING

\$2,773,474,900

(+15.4% from FY23 & -0.3% from FY24)



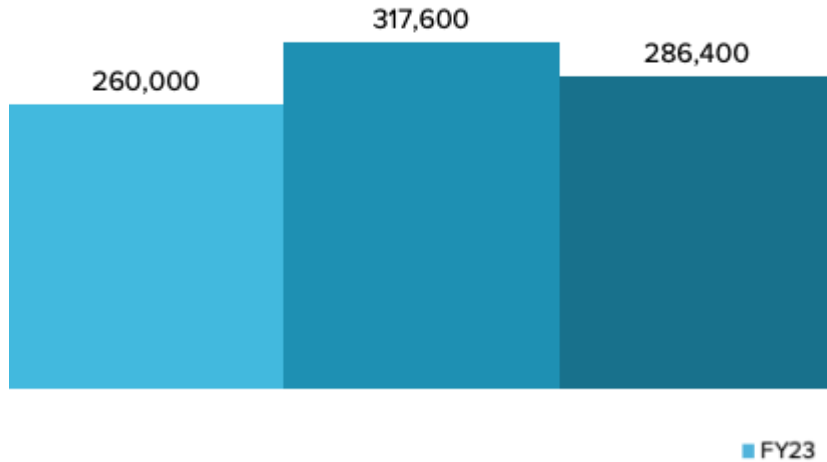
■ FY23 ■ FY24 ■ FY25

October - August | Int'l Visitation & Canadian Visitation¹

INTERNATIONAL VISITATION

286,400

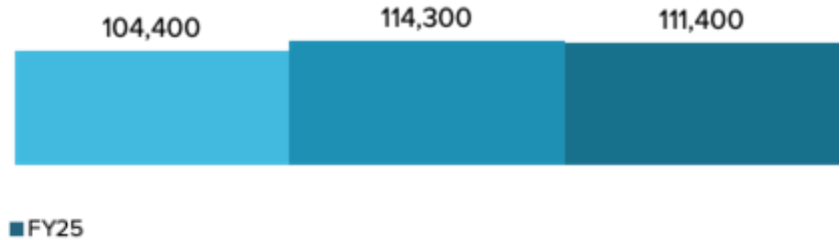
(+10.2% from FY23 & -9.8% from FY24)



CANADIAN VISITATION

111,400

(+6.7% from FY23 & -2.5% from FY24)



FY25 | Research Findings Summary

Creative Testing Focus Groups (Conducted in March 2025)

- The value proposition was consistent with people's prior experiences and perceptions of the destination.
- Respondents perceived the destination as an escape from daily routines, characterized by a quiet and welcoming atmosphere that emanated warmth, vibrancy, and affluence.

Advertising Effectiveness Pre-Test (Conducted in April 2025)

- Viewers found the destination more appealing and were more certain about visiting the area within the following year after viewing the promotional video. Key video highlights included white sandy beaches, crystal-clear water, dining, and a relaxing atmosphere.

Advertising Effectiveness Post-Test (Conducted in August 2025)

- Increased advertising efforts drove visitation/bookings and intent to visit/book.
- 1 in 4 respondents who recalled being exposed to advertising said that they booked a trip to the area because of the appeal of the area in the advertisements.
- Respondents who recalled being exposed to advertising were also 3.5 times more likely to say they are “very likely” to visit the area within the next 12 months.

FY25 | Accomplishments

- Investment of \$5M Supplemental Funding
- Strengthened Consumer & Sales (Groups/Meetings, Travel Trade) Campaigns:
 - **Expanded to New Markets:** Milwaukee, Cincinnati, Columbus, Nashville, Charlotte, Denver, Dallas-Fort Worth
 - **Amplified Existing Markets:** Boston, Philadelphia, Washington DC, Detroit, Cleveland, Minneapolis, Indianapolis
 - **Sales:** Established New & Strengthened Existing Industry Partnerships and Advertising Campaign Efforts
- Brand & Campaign Research
- Evolved Campaign Creative Direction + New Campaign Content Capture
- International Public Relations
- Launched New Website & Hotel Booking Engine
- 2025 Visit Florida Flagler Henry Award Winner: **“Only Paradise Will Do Print Campaign”**



FY25 | Marketing Performance Highlights

+9.64%

**Expanded Markets
Hotel Revenue^[2]**

+15.21%

**Transient
Demand^[1]**

+6.81%

**Enhanced Markets
Hotel Revenue^[2]**

\$39.33

**ROAS^[3]
Return on Ad Spend**

Source: [1] STR Demand data for October 2024 - August 2025 compared to same period year over year; [2] Key Data revenue based on Hotel Feeder Market data for March 2025 to July 2025 compared to same period in 2024. [3] Return on ad spend (ROAS) is calculated using initial Adara Impact reports from media partners with observed revenue attribution and Expedia attribution data. Additional data is expected, which may affect the final results. ROAS represents the revenue generated for every dollar spent on advertising.

FY26 | Situation & Opportunities

- **Investment of \$5M Supplemental Funding Continued**
- **Uniquely positioned to accelerate growth, expand appeal, and strengthen global competitiveness**
- **Destination & Market Dynamics:**
 - **Global Shifts:** Rising demand from high-value travelers seeking premium U.S. destinations
 - **New Lodging:** Luxury additions (e.g., Four Seasons) expand capacity and elevate appeal
 - **Rising Competition:** Other upscale destinations intensifying promotion—driving need for sharper brand differentiation
- **Traveler Trends Shaping Strategy:**
 - Luxury and wellness-focused experiences
 - Immersive, personalized travel
 - Authentic cultural and ecological encounters



FY26 | Marketing Snapshot

FY26 Strategy: Capitalize on these trends to protect brand equity, deepen engagement, and drive sustainable, year-round growth.

- **Leisure Marketing**

- Strengthen advertising campaigns year round
- Expanded Fall/Winter & Spring/Summer markets
- Unique luxury media partnerships

- **Sales Initiatives**

- Enhance **key partnerships** (Amadeus, Signature, HelmsBriscoe, Maritz, etc.)
- Continue **successful sales advertising programs**
- Host **luxury familiarization tours** for advisors & planners

- **Brand & Digital Evolution**

- Launch **new, research-driven brand campaign**
- Expand and refine **digital efforts**
- **Leverage AI** for trip planning, search engine optimization & social marketing
- Deliver **personalized, multi-channel content**

- **Attribution & Optimization**

- Strengthen **data-driven attribution** tracking
- New data partnership: **Tourism Economics-an Oxford Economics Company**
- Optimize campaigns to maximize **return on investment**



FY25 | Paradise Coast Sports Complex Update

Paradise Coast Sports Complex: Economic Driver

Generating Significant Economic Impact and Local Business Activity

- Produced an estimated \$56.9 million in economic impact during FY 24-25 from 33 qualified events.
- About one-third of event participants travel from outside the local area, typically staying two to four days and spending around \$150 per person per day on lodging, dining, and activities that support local businesses.
- Weekend tournaments and showcases drive the majority of traffic. Friday through Sunday account for more than 60 percent of weekly visits.
- Peak hours between 4:00 pm and 7:00 pm align with local dining and retail activity and create measurable benefits for area businesses.
- Visitors represent an affluent and educated audience. The median income is \$77,700, the median age is 46, and 35 percent hold a bachelor's degree or higher. The largest segment (65 and older) includes traveling retirees who tend to stay longer and spend more.



FY25 | Paradise Coast Sports Complex Update

Performance Highlights and Expanding Market Reach

Visitation Growth and Regional Expansion Drive Sustained Success

- Drew more than 719,000 visits in FY 24-25, representing a 12 percent increase year over year and 83 percent growth over three years.
- Welcomed nearly 195,000 unique visitors who averaged 3.7 visits per person, demonstrating strong repeat engagement.
- Guests spent an average of over two hours on-site (130 minutes average; 115 minutes median).
- According to Placer.ai visitation analytics, the Paradise Coast Sports Complex ranks #22 statewide among 164 Florida sports venues in overall visitation.
- Continued to draw from across Southwest Florida, with the strongest origins in Naples Manor, Verona Walk, Pelican Marsh, and Estero—reinforcing its role as a regional hub for sports and recreation.



Thank you.


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FLORIDA'S PARADISE COAST

