

NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau
May 2023 Monthly Dashboard





This report and all future reports will be focused on ALL visitors, which includes day trippers as well as visitors staying in unpaid accommodations. Previous reports were based solely on data from visitors who stayed in paid accommodations.



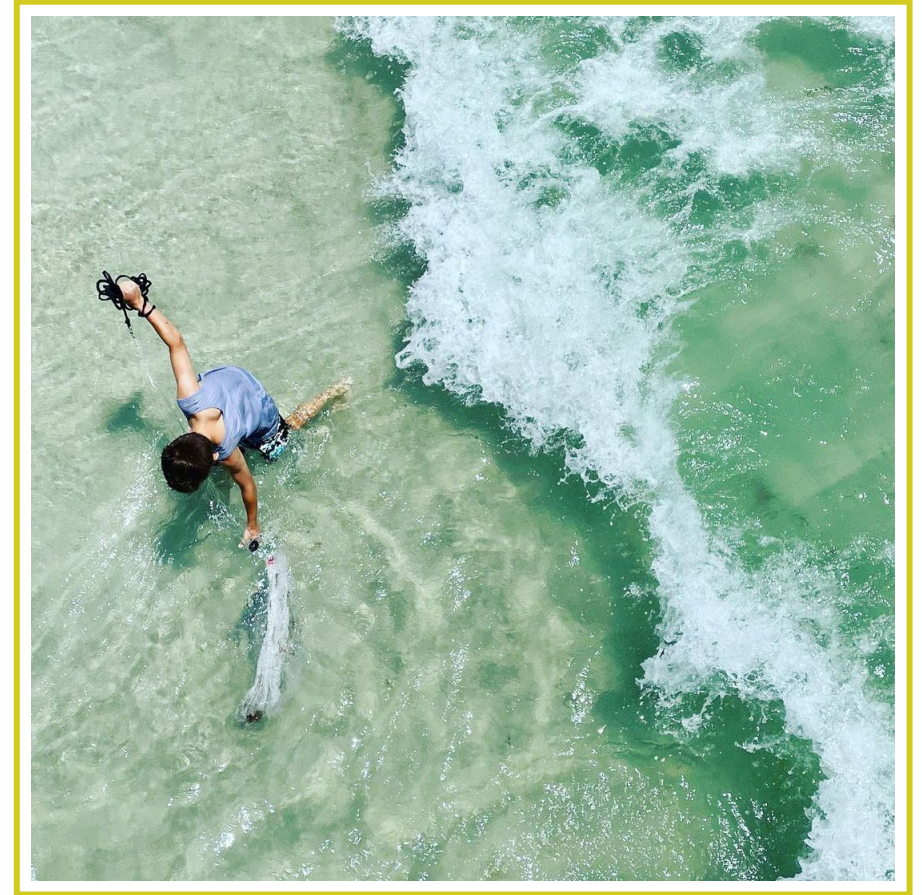
In May of 2023, Occupancy was down 6.0% from 2022 and down 2.3% from 2019's pre-pandemic levels. However, while ADR was down 9.5% from May's all-time high in 2022, it still reflected a 27.4% increase from May 2019 and just a 1.9% drop from May 2021.



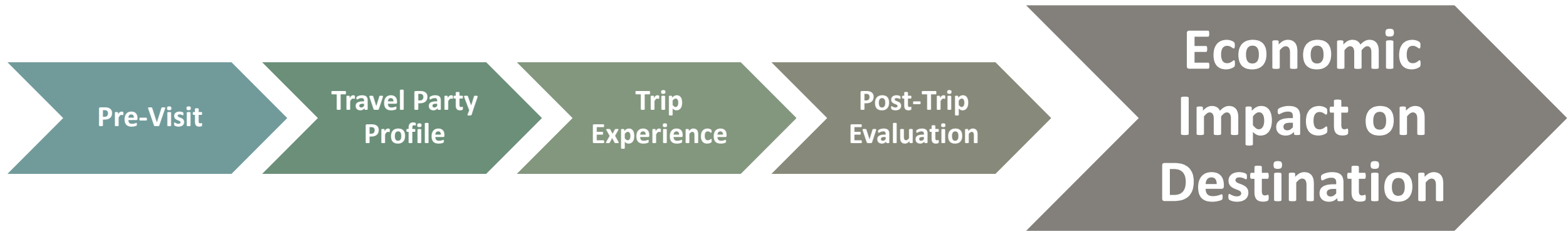
The drops in visitation, room nights, and visitor days were still driven mainly by the decreased occupancy level, fewer available units, a longer length of stay, and fewer day trippers. As such, direct spending and economic impact were both still down YOY, 10% and 16% respectively. However, the magnitude of the YOY decreases were less severe than those seen in April of 2023.



International visitation is continuing to recover steadily, despite RSW's cumulative passenger traffic being down roughly 18% YOY so far in 2023. International visitation has accounted for 146,300 (11.6% of total) visitors to the Naples area so far in 2023, up from just 120,500 (8.5% of total) during the same period in 2022.



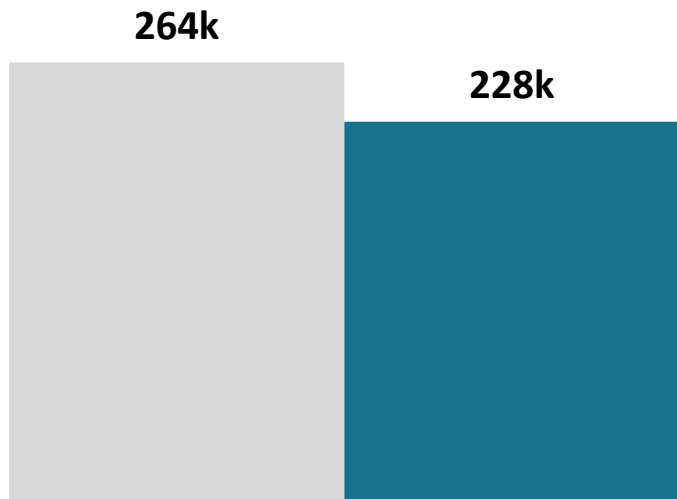
VISITOR JOURNEY: ECONOMIC IMPACT



MAY 2023 VISITATION & ROOM NIGHTS

VISITORS

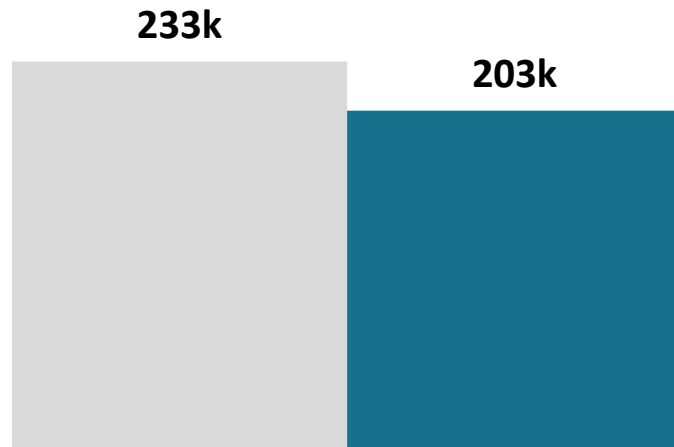
228,000



- 13.6% from 2022

ROOM NIGHTS

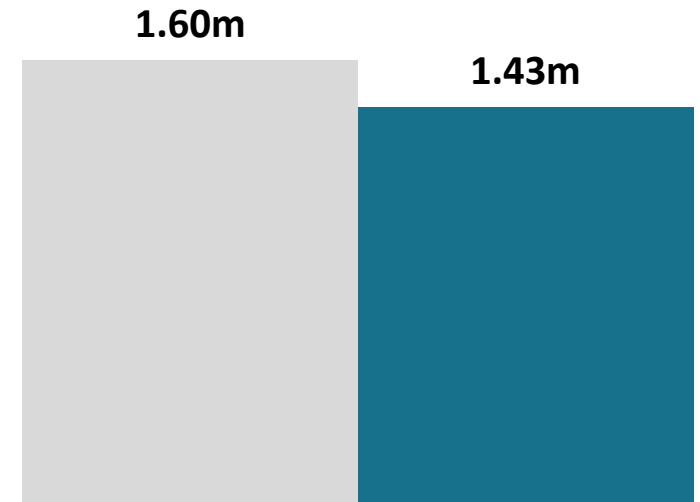
203,000



- 12.7% from 2022

VISITOR DAYS

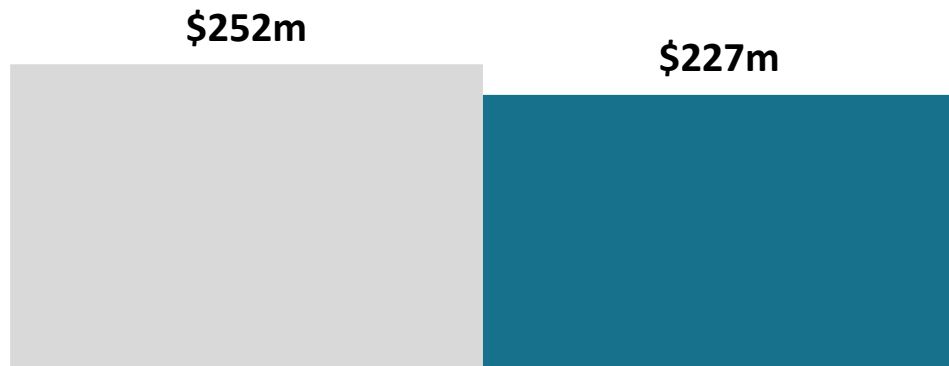
1,429,600



- 10.8% from 2022

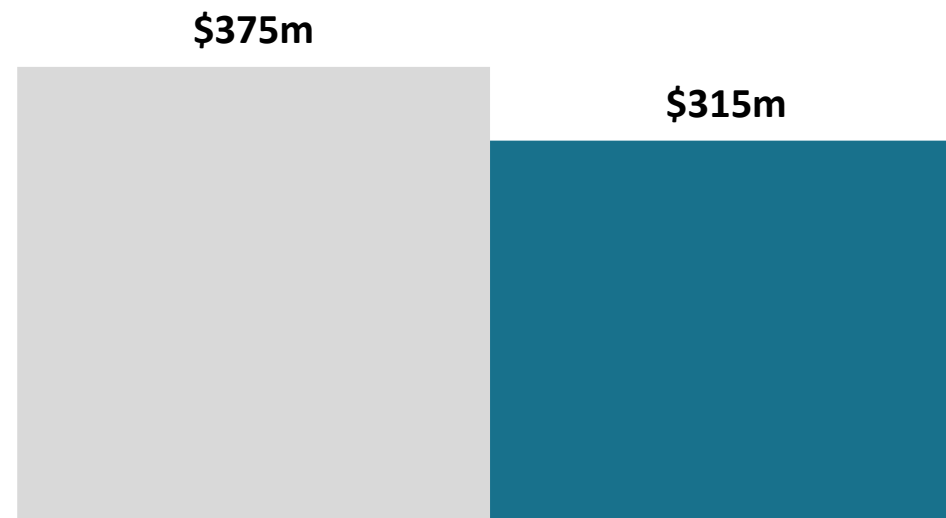
■ May-22 ■ May-23

DIRECT SPENDING
\$226,593,100



- 10.0% from 2022

ECONOMIC IMPACT
\$314,511,200



- 16.2% from 2022¹

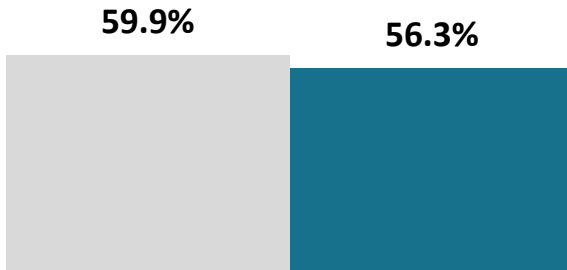
■ May-22 ■ May-23

¹ The IMPLAN multiplier for Collier County was 1.491 for 2022 and is 1.388 in 2023.

MAY 2023 OVERALL LODGING METRICS¹

OCCUPANCY RATE

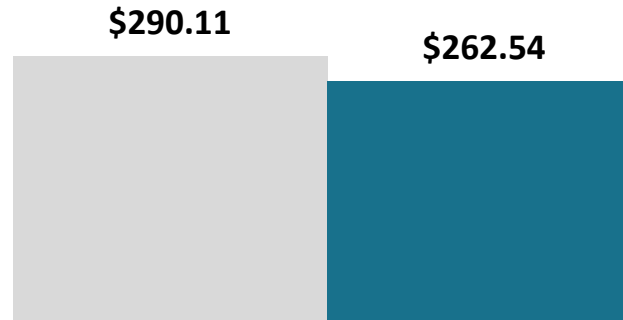
56.3%



- 6.0% from 2022

AVERAGE DAILY RATE

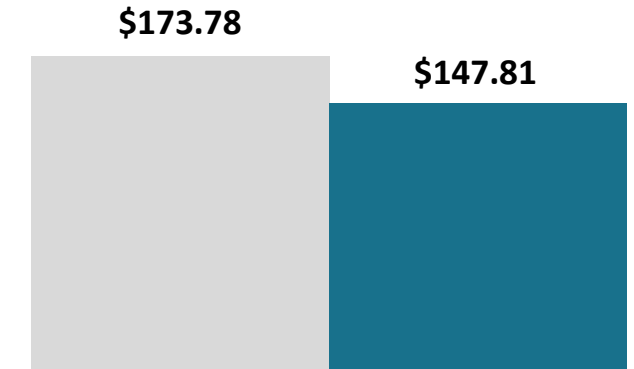
\$262.54



- 9.5% from 2022

REVENUE PER AVAILABLE ROOM

\$147.81



- 14.9% from 2022

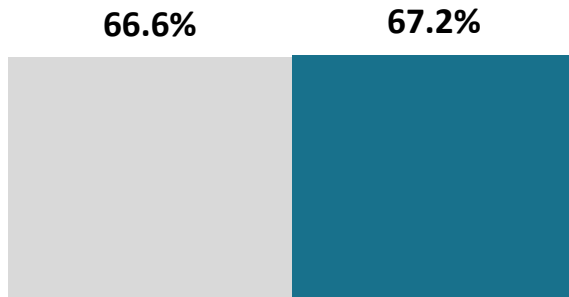
■ May-22 ■ May-23

¹ Sources: STR, AllTheRooms, and
DSG Occupancy Study data

MAY 2023 HOTEL LODGING METRICS¹

OCCUPANCY RATE

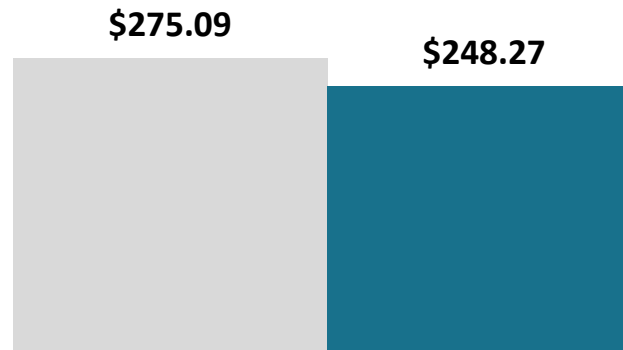
67.2%



+ 1.0% from 2022

AVERAGE DAILY RATE

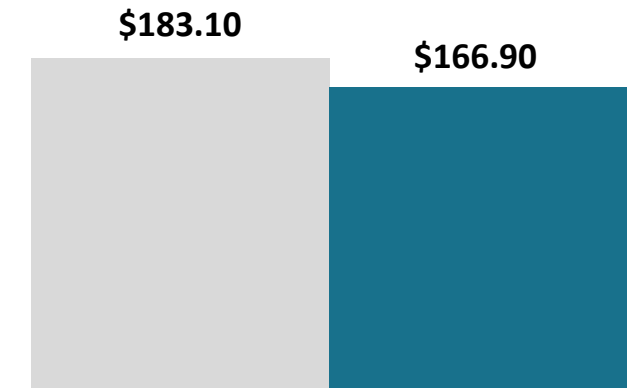
\$248.27



- 9.8% from 2022

REVENUE PER AVAILABLE ROOM

\$166.90

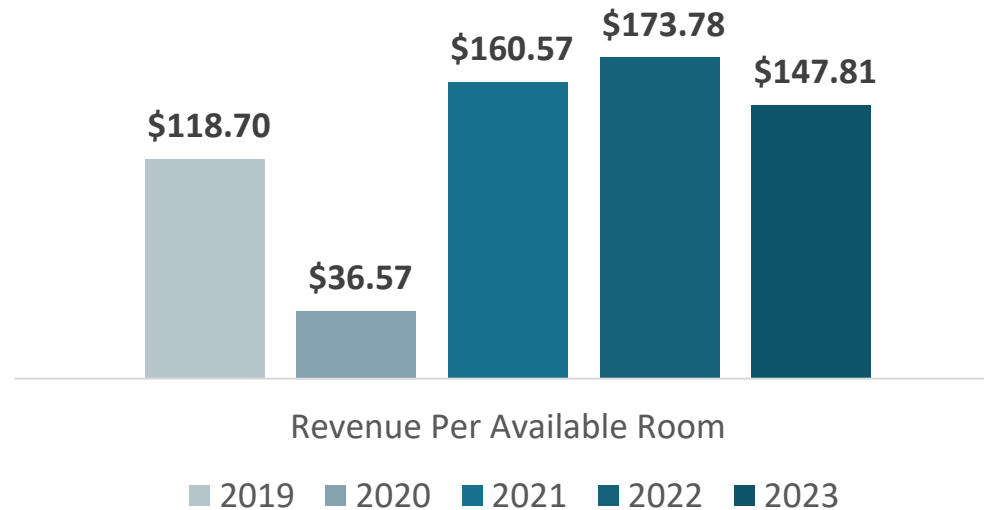
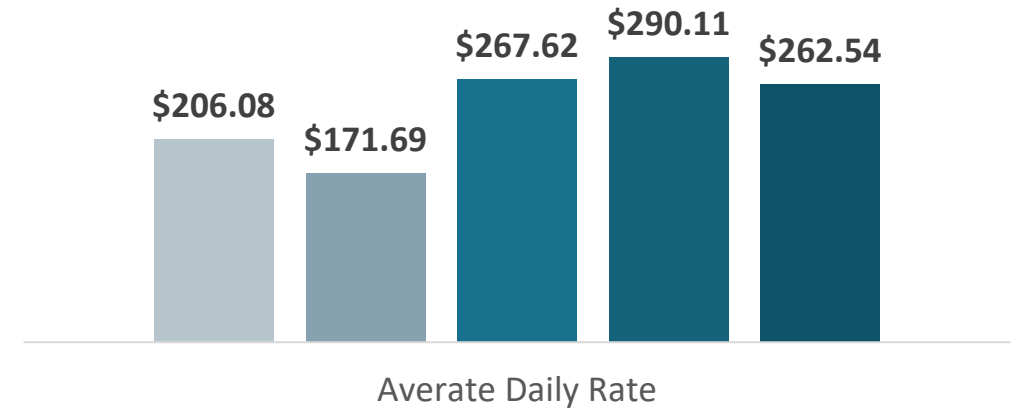
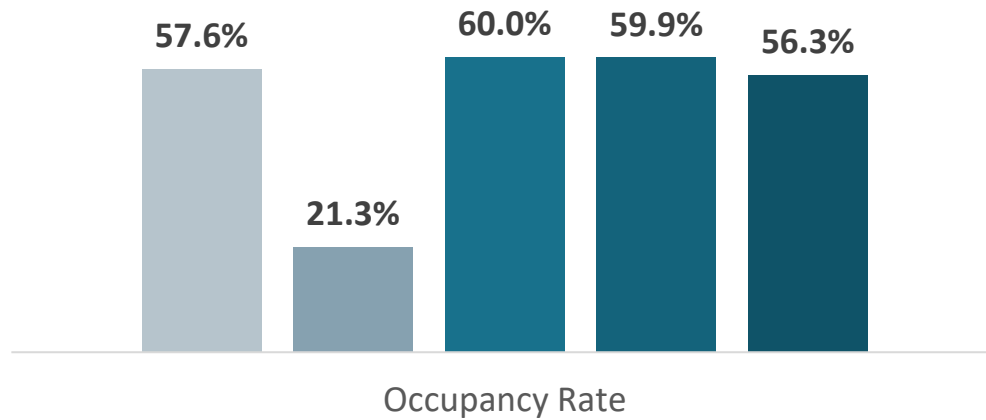


- 8.8% from 2022

■ May-22 ■ May-23

¹Source: STR Reports

MAY 2019-2023 OVERALL LODGING METRICS¹



¹ Sources: STR, AllTheRooms, and DSG Occupancy Study data

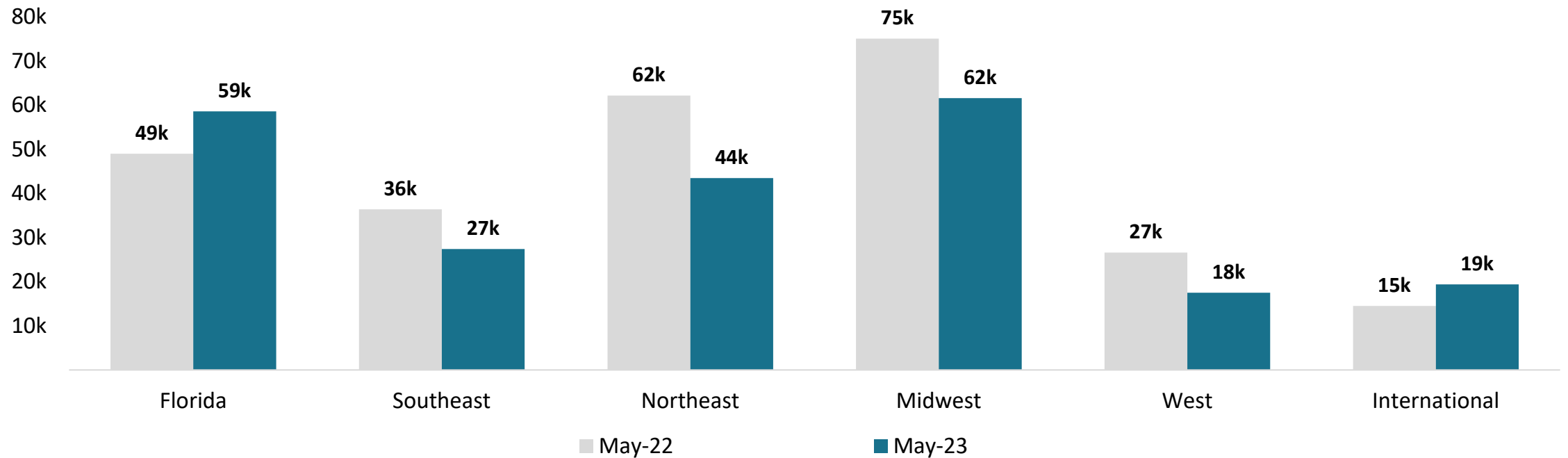
VISITOR ORIGIN

FLORIDA VISITORS

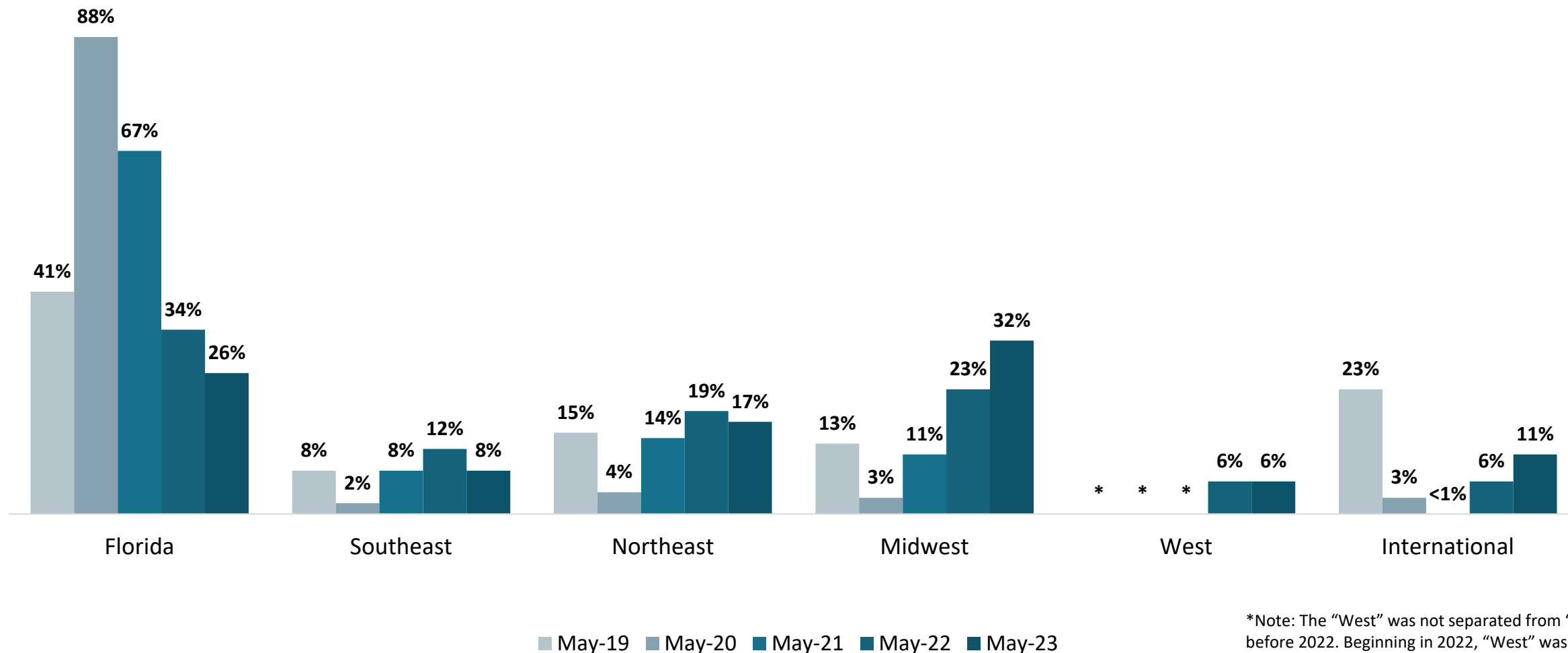
58,600

OUT-OF-STATE VISITORS

169,400



MAY 2019-2023 OVERNIGHT VISITOR ORIGIN

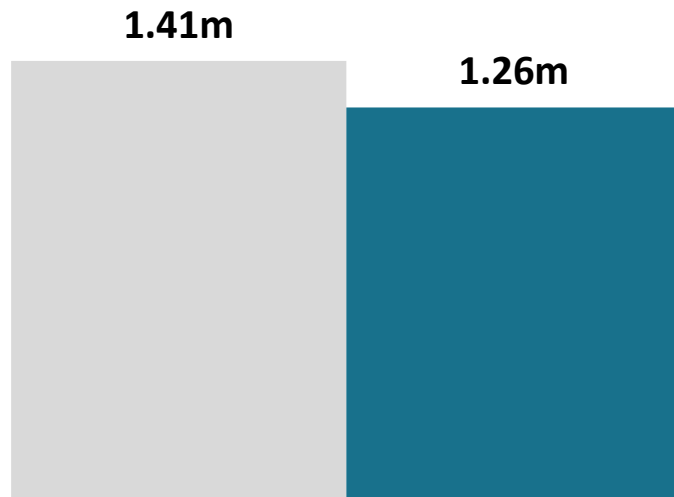


*Note: The "West" was not separated from "Other" before 2022. Beginning in 2022, "West" was added and "Other" was changed to "Other International".

YEAR-TO-DATE VISITATION METRICS

CYTD VISITORS

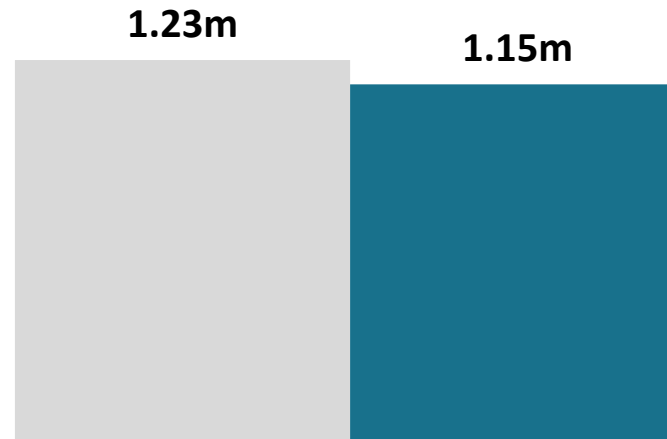
1,261,800



- 10.6% from 2022

CYTD ROOM NIGHTS

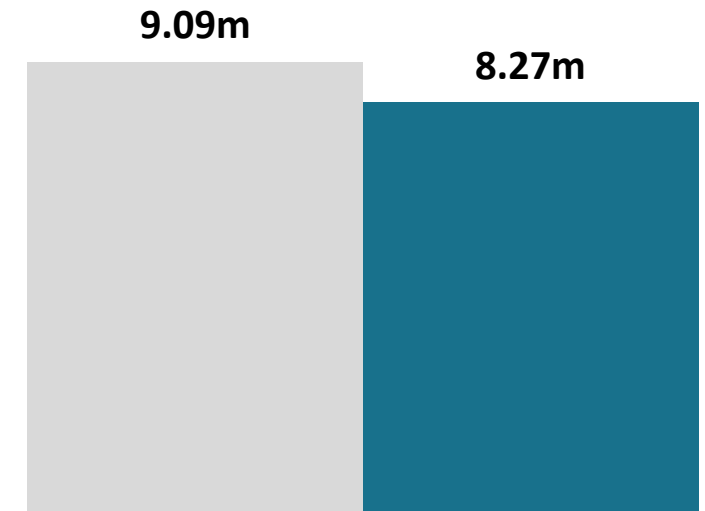
1,149,400



- 6.4% from 2022

CYTD VISITOR DAYS

8,271,000



- 9.0% from 2022

■ May-22 ■ May-23

YEAR-TO-DATE SPENDING & ECONOMIC IMPACT

CYTD DIRECT SPENDING

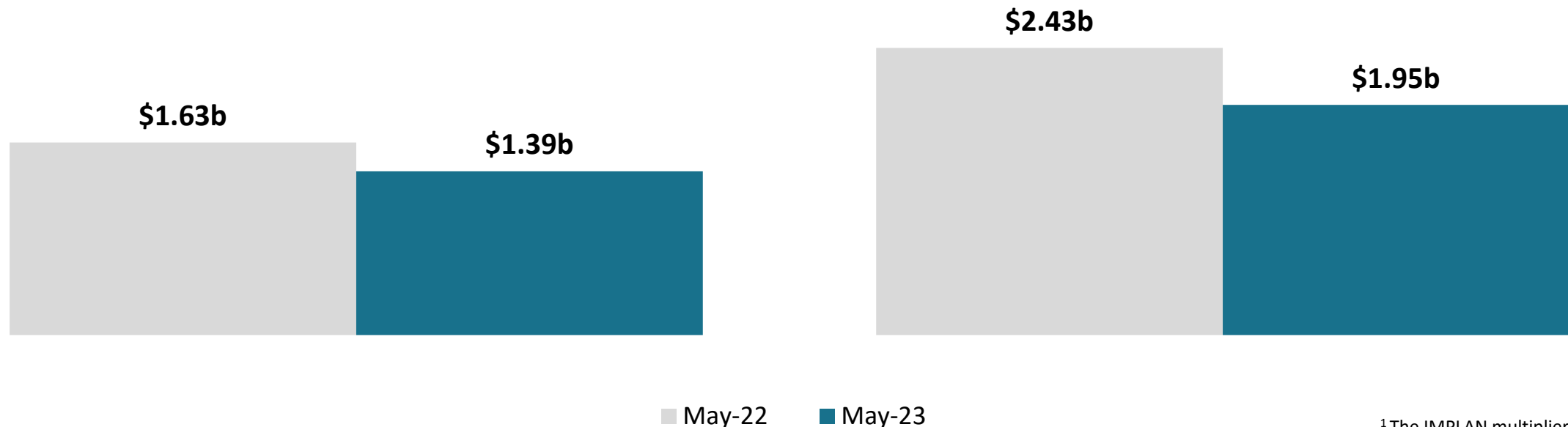
\$1,387,386,600

- 15.0% from 2022

CYTD ECONOMIC IMPACT

\$1,949,755,800

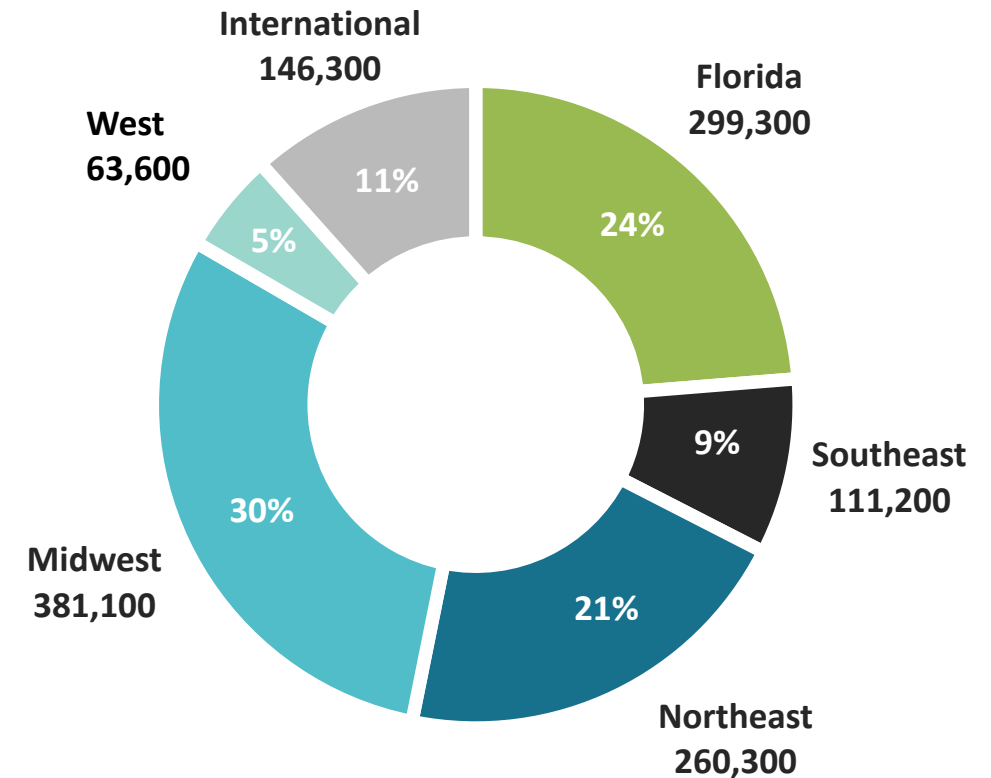
- 19.8% from 2022¹



¹ The IMPLAN multiplier for Collier County was 1.491 for 2022 and is 1.388 in 2023.

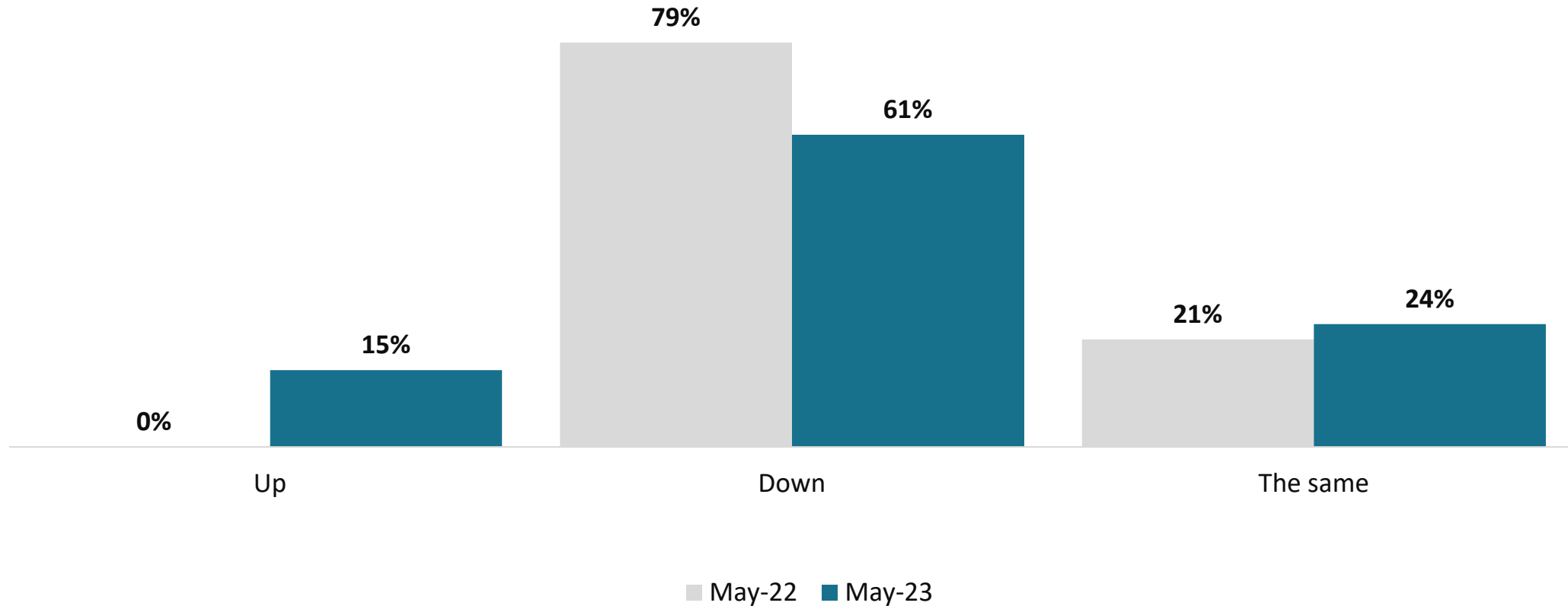
CYTD 2023 VISITOR ORIGIN MARKETS

Region	CYTD 2022		CYTD 2023		Percent Change (Δ%)	
	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	240,700	17.1%	299,300	23.7%	24.3%	39.1%
Southeast	150,000	10.6%	111,200	8.8%	-25.9%	-17.1%
Northeast	361,600	25.6%	260,300	20.6%	-28.0%	-19.5%
Midwest	452,700	32.1%	381,100	30.2%	-15.8%	-5.8%
West	86,200	6.1%	63,600	5.0%	-26.2%	-17.5%
Canada	35,900	2.5%	63,500	5.0%	76.9%	97.9%
Europe	54,100	3.8%	44,600	3.5%	-17.6%	-7.8%
C/S America	11,500	0.8%	21,900	1.7%	90.4%	113.1%
Other	19,000	1.3%	16,300	1.3%	-14.2%	-4.0%
Total	1,411,700	100.0%	1,261,800	100.0%		



OCCUPANCY BAROMETER

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





Pre-Visit

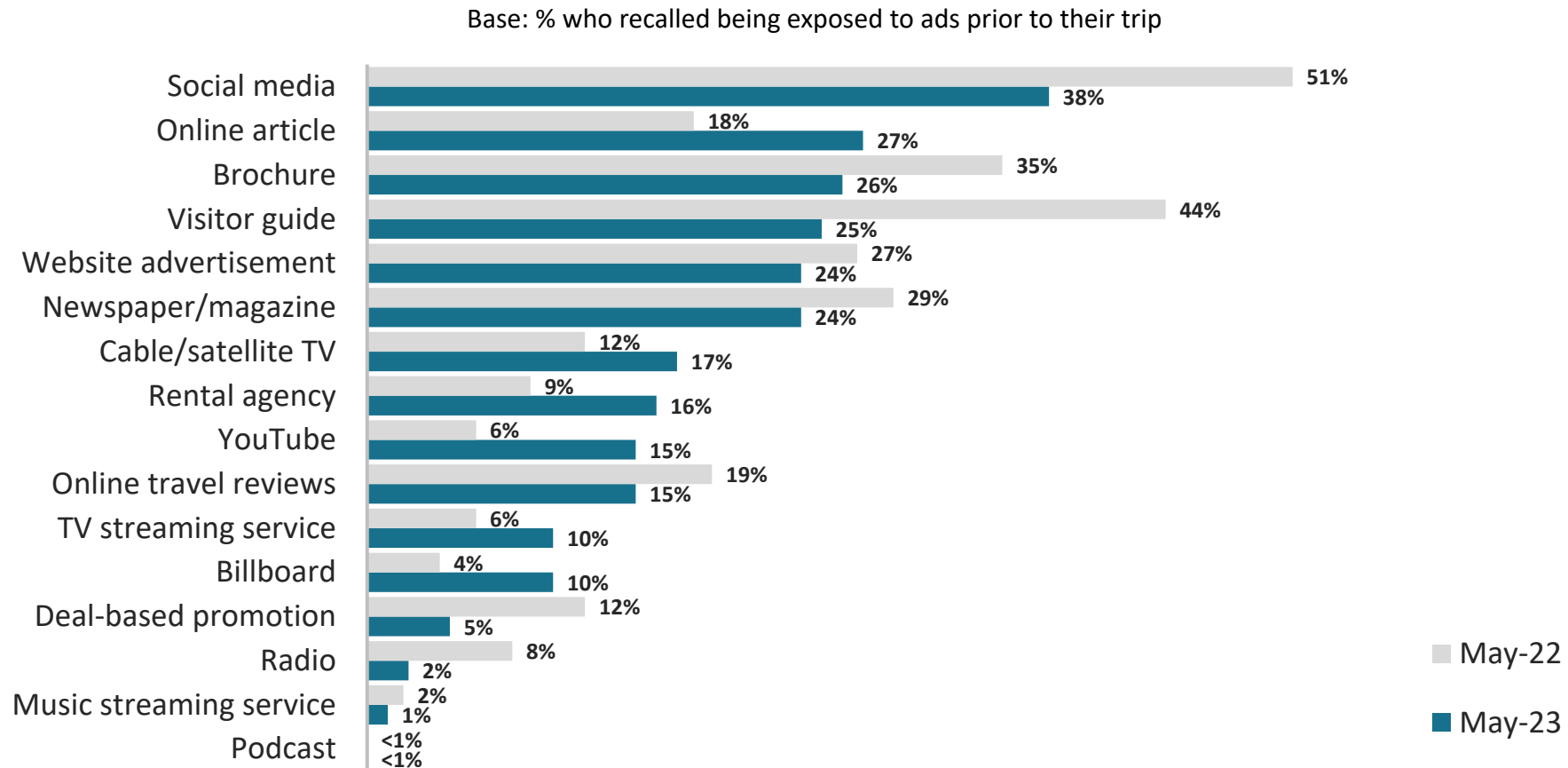
**Travel Party
Profile**

**Trip
Experience**

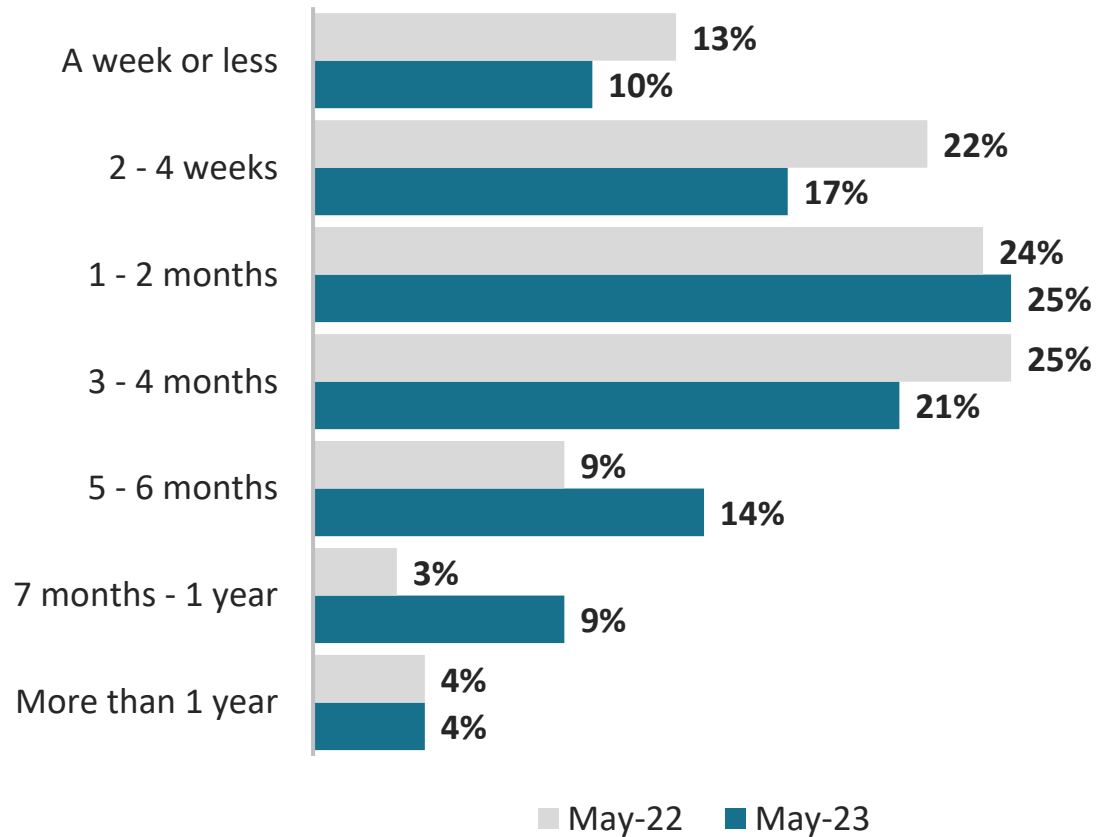
**Post-Trip
Evaluation**

**Economic
Impact on
Destination**

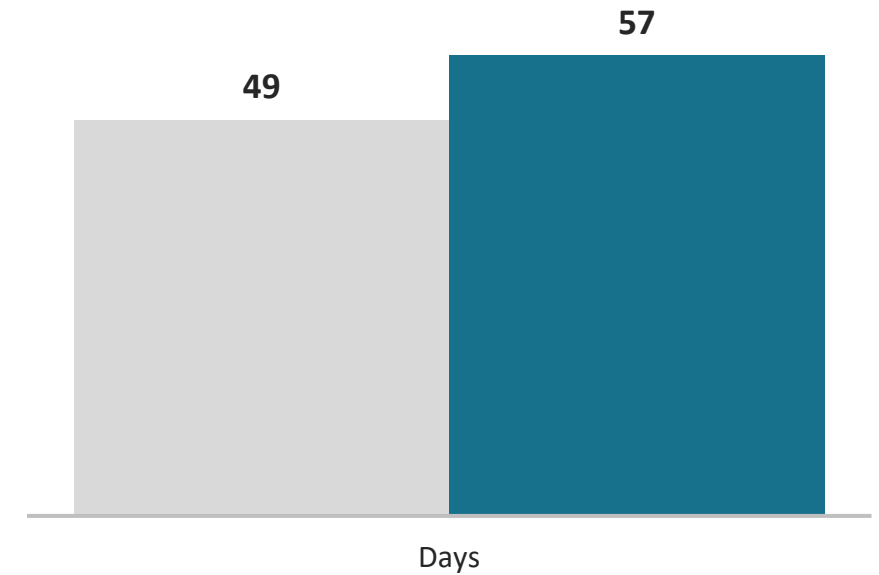
EXPOSURE TO ADVERTISING



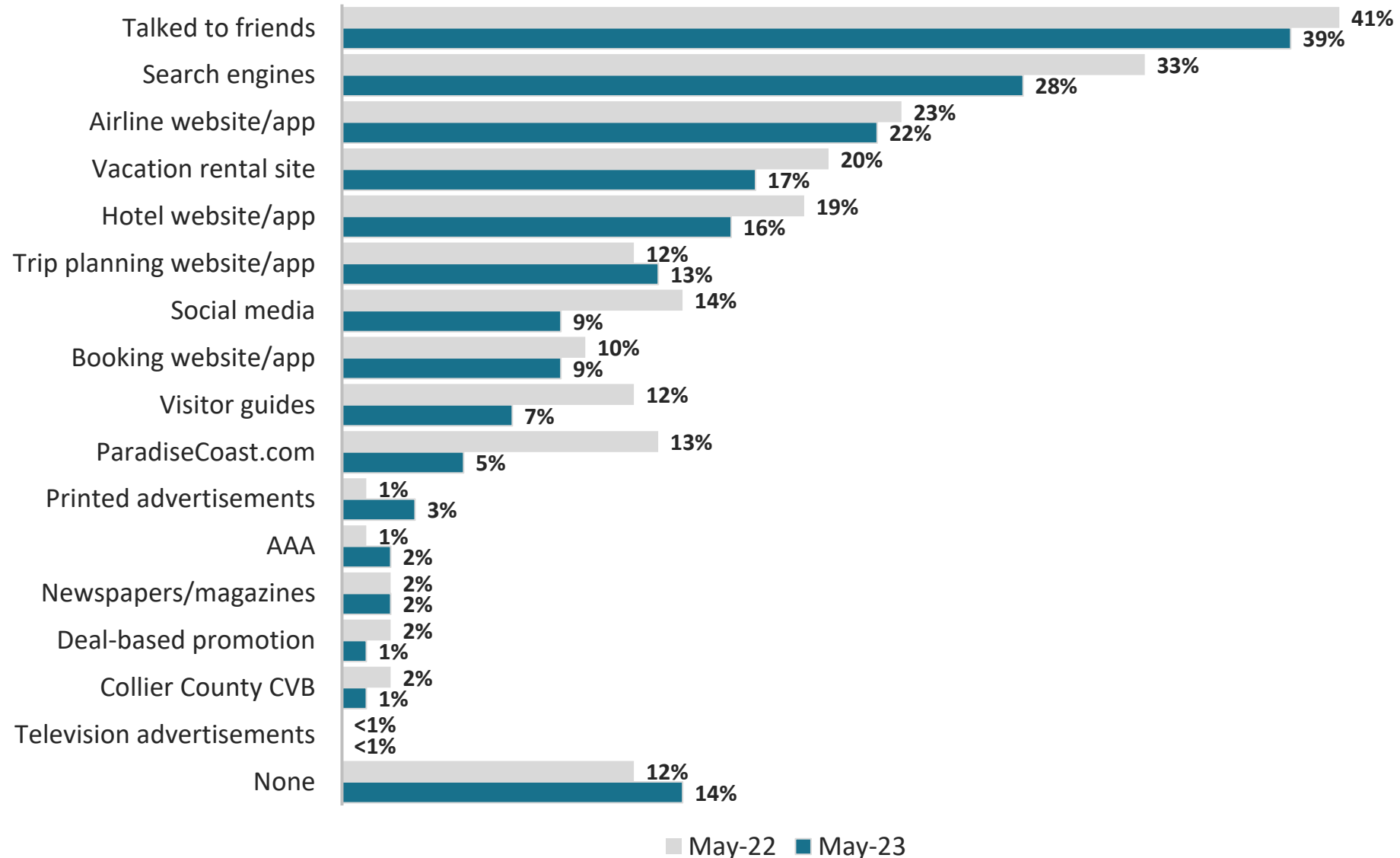
TRIP PLANNING CYCLE



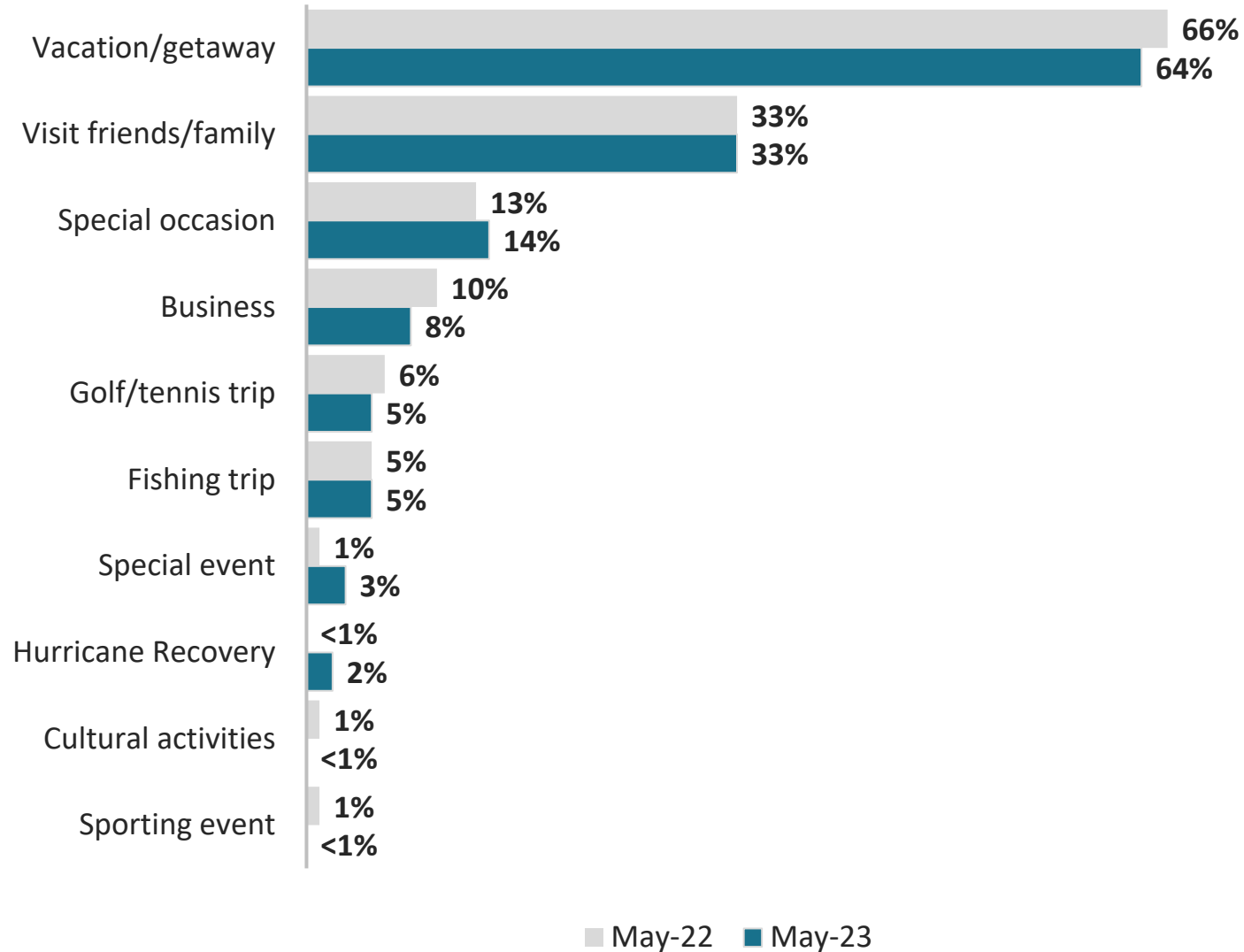
Median Trip Planning Time



TRIP PLANNING SOURCES

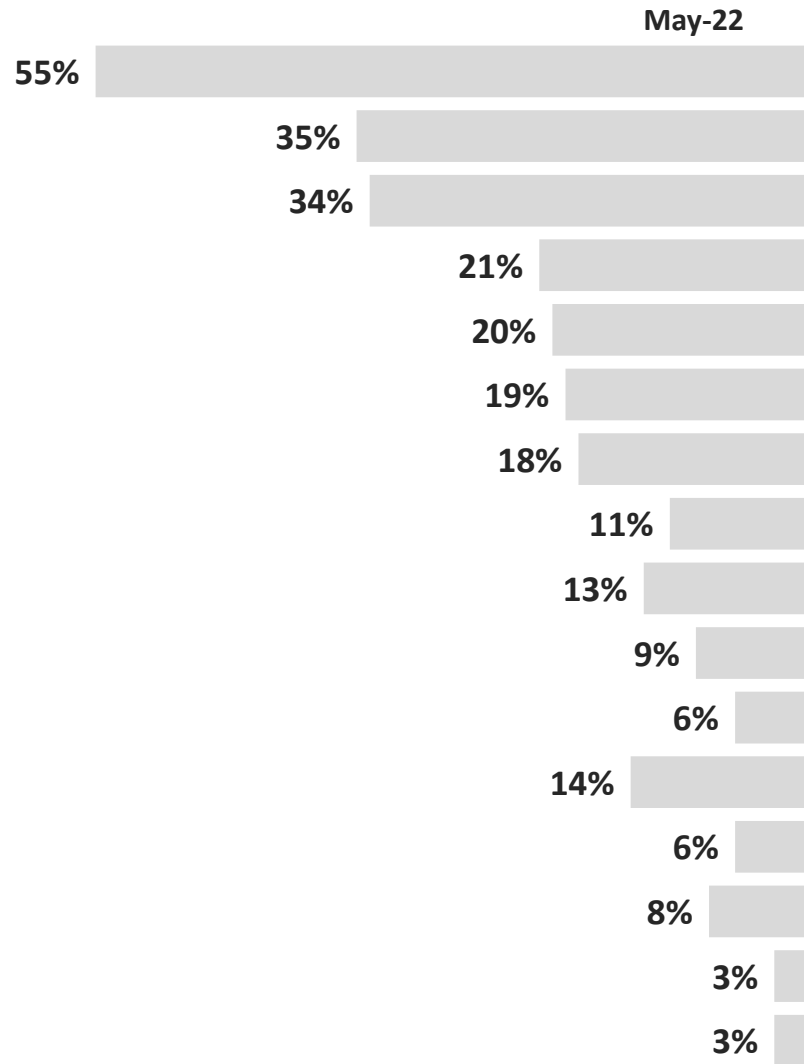


REASONS FOR VISITING¹

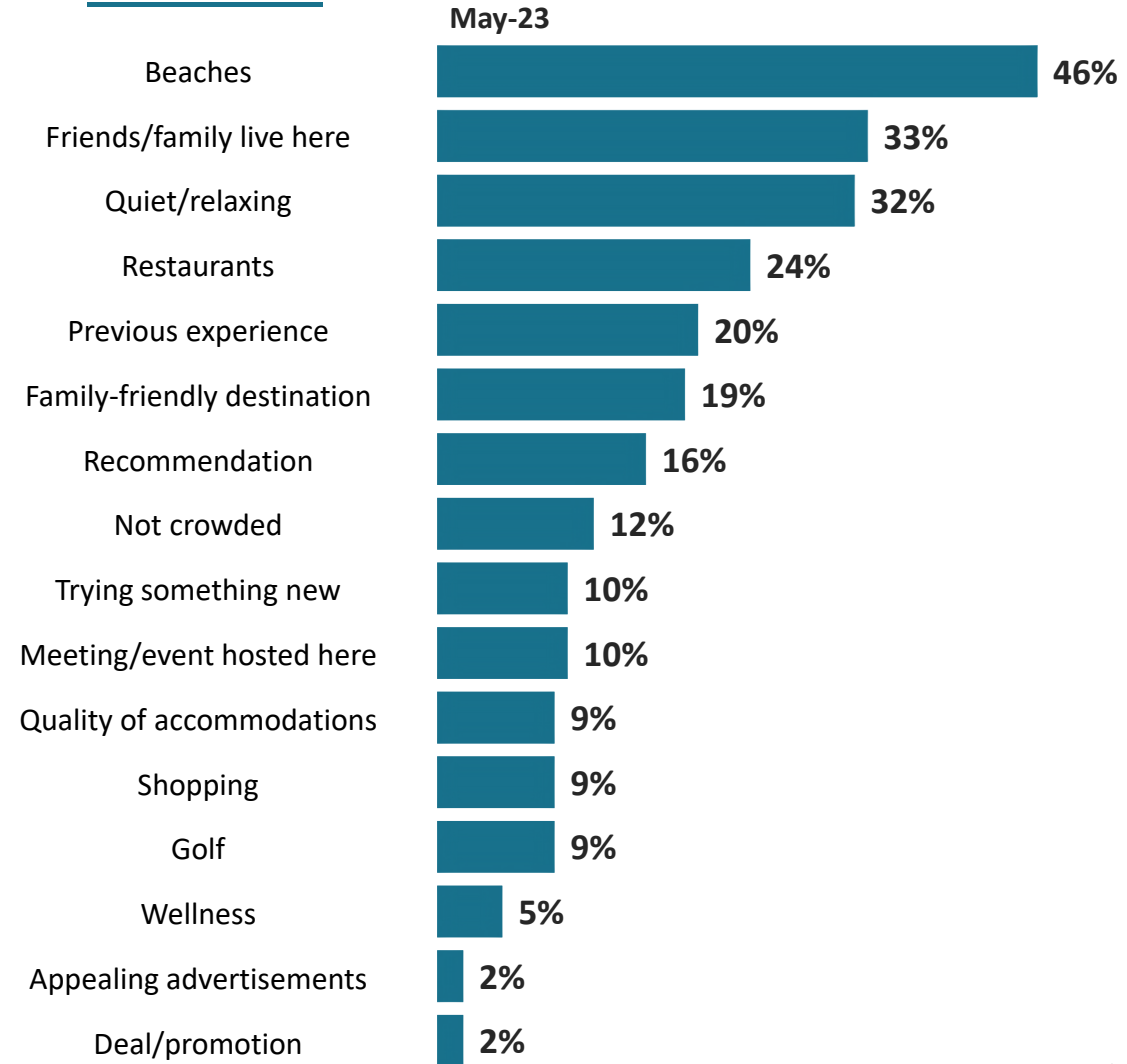


¹ Multiple responses permitted.

REASONS FOR CHOOSING AREA

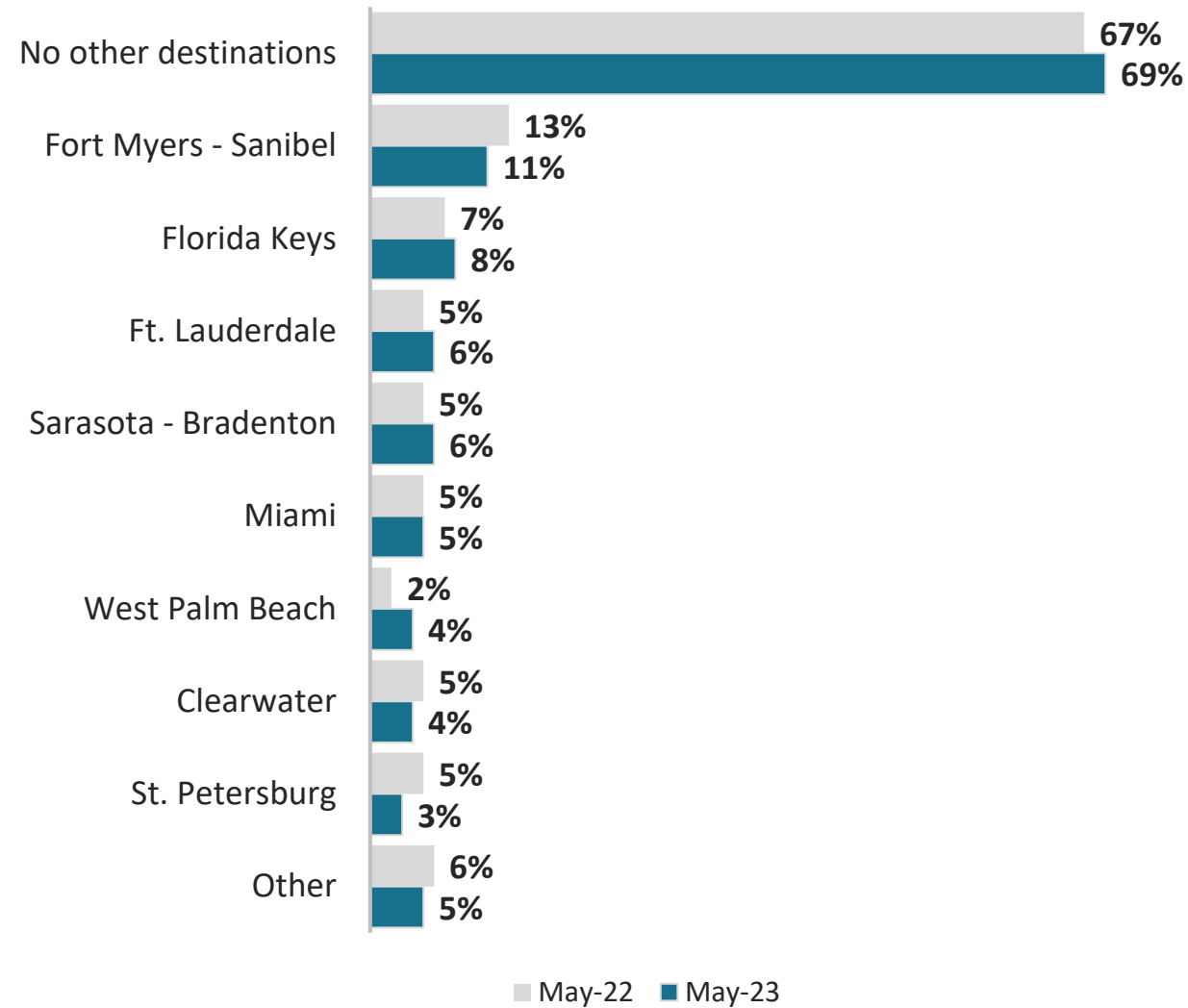


Reasons¹



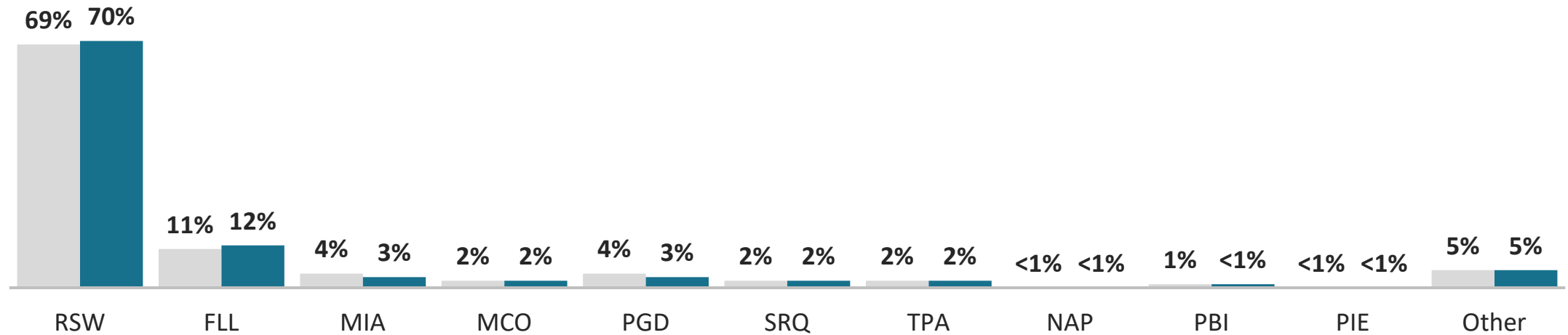
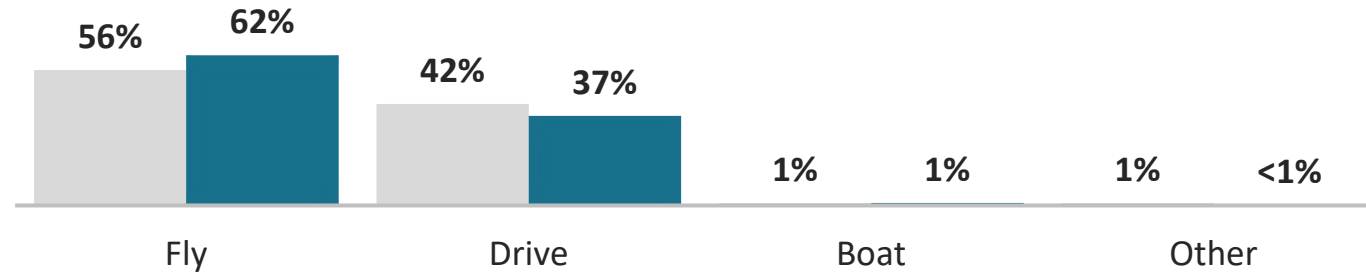
¹Multiple responses permitted.

OTHER DESTINATIONS CONSIDERED¹



¹ Multiple responses permitted.

TRANSPORTATION METHODS

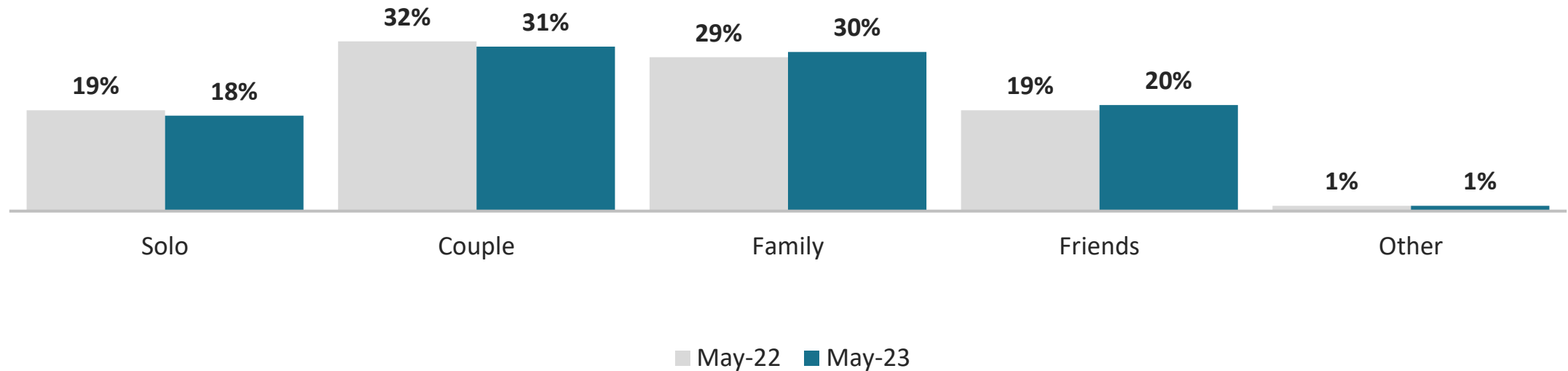


■ May-22 ■ May-23

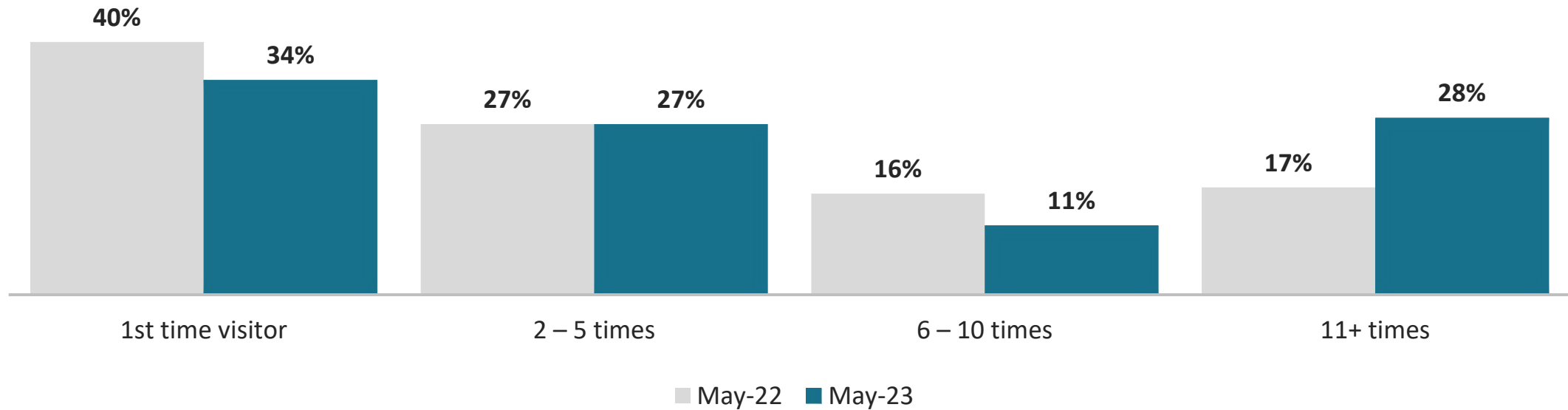
VISITOR JOURNEY: TRAVEL PARTY PROFILE



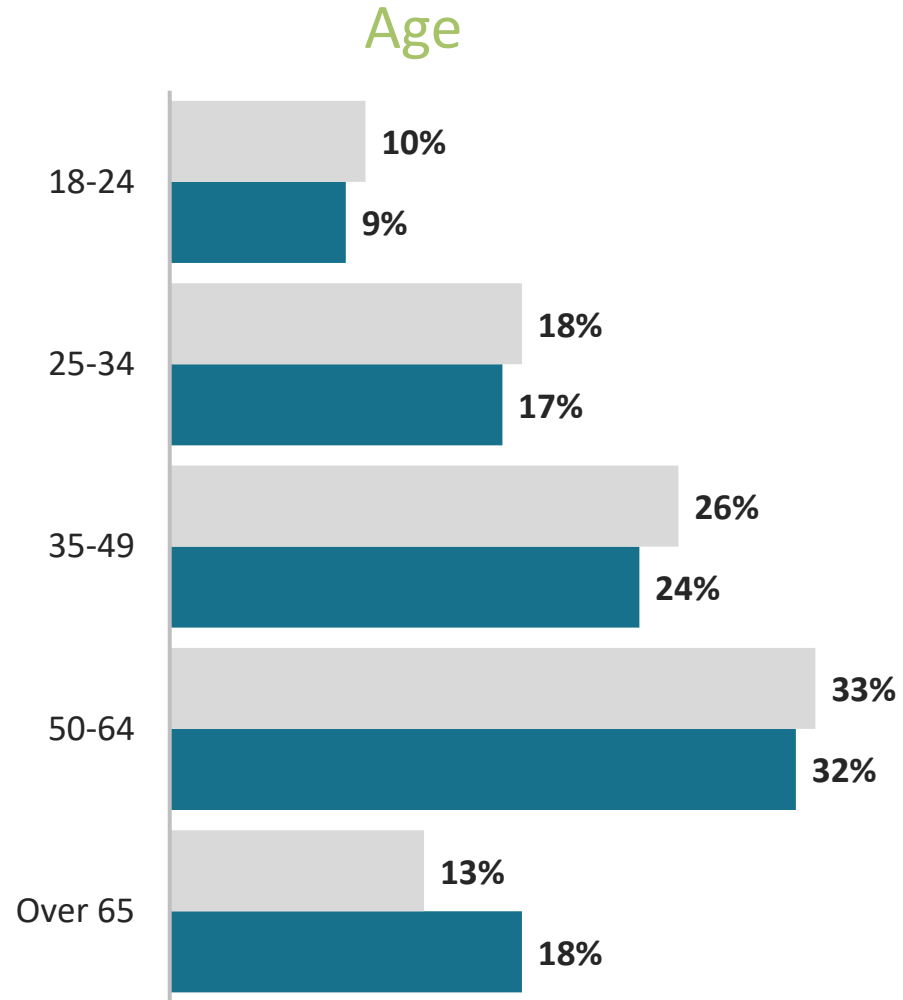
TRAVEL PARTY COMPOSITION



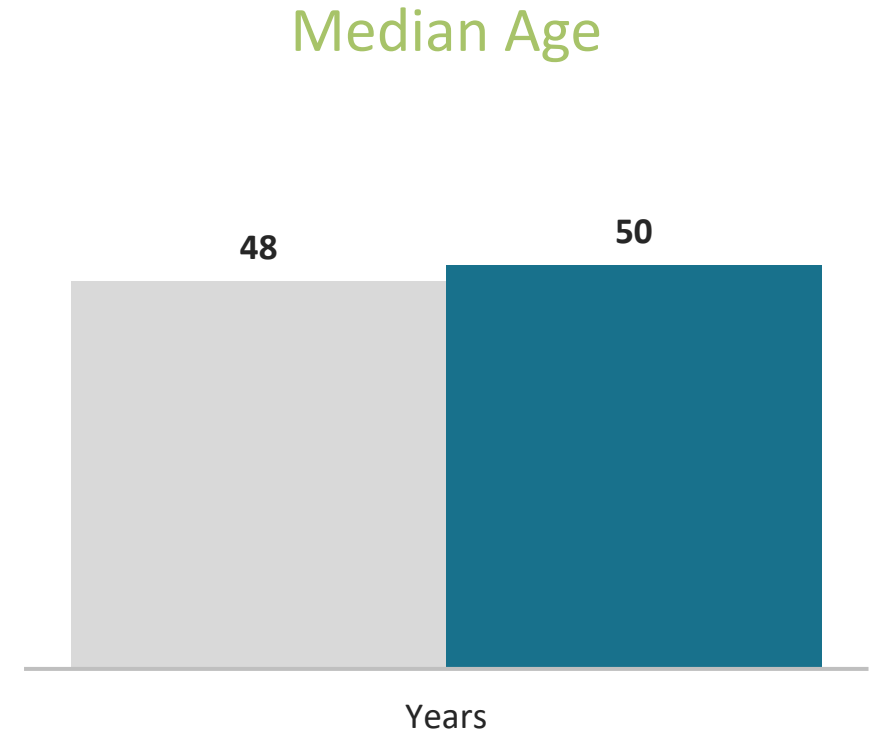
PREVIOUS VISITS



VISITOR AGES

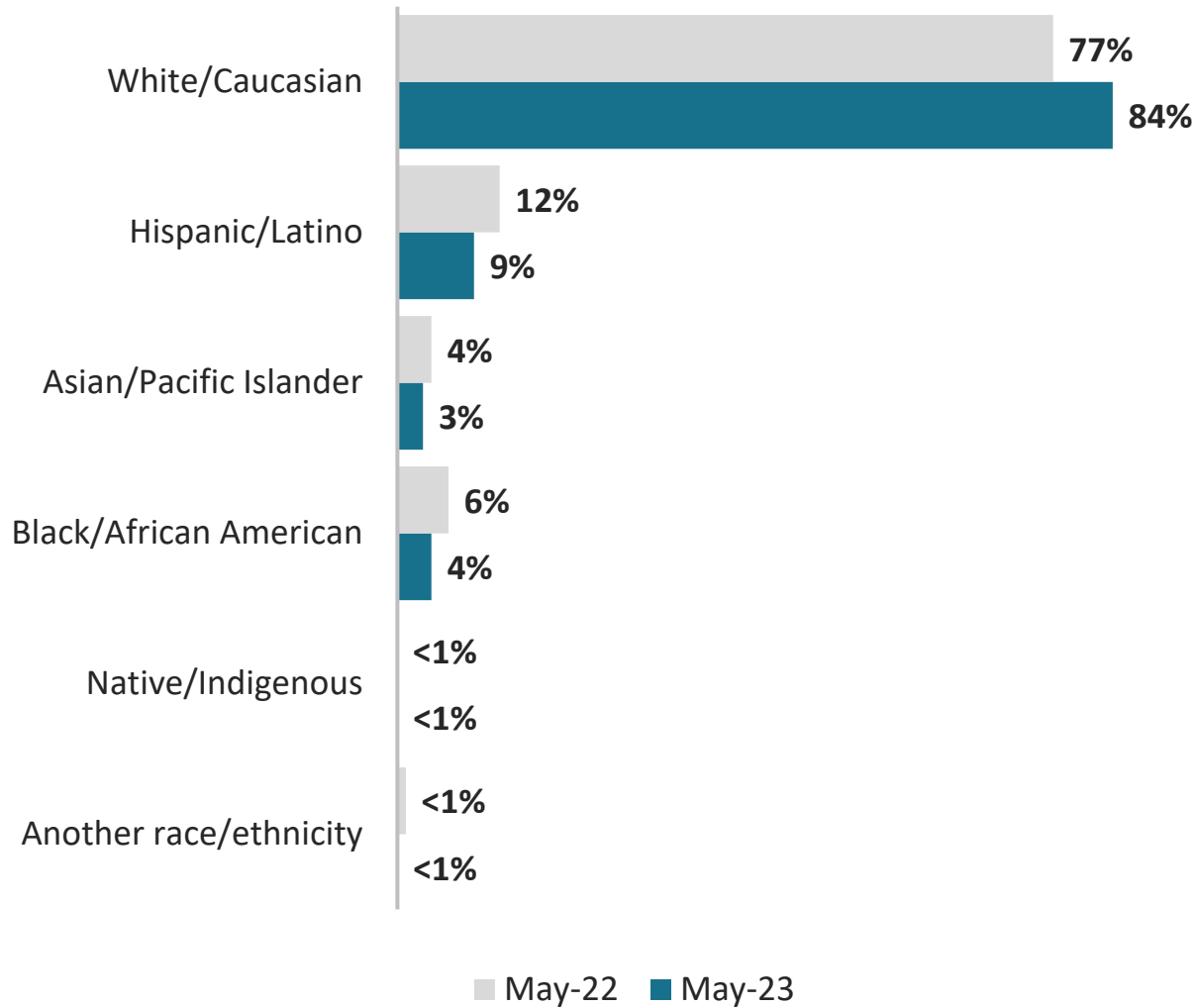


■ May-22 ■ May-23

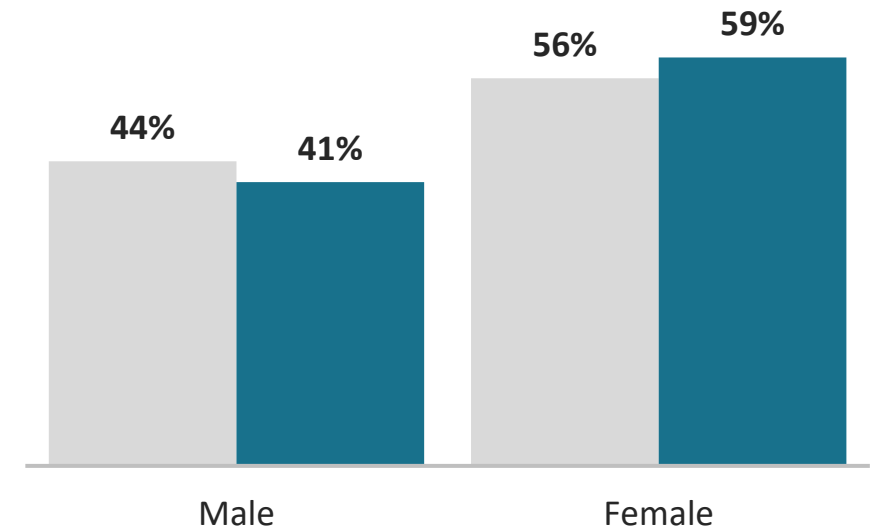


VISITOR RACE & GENDER

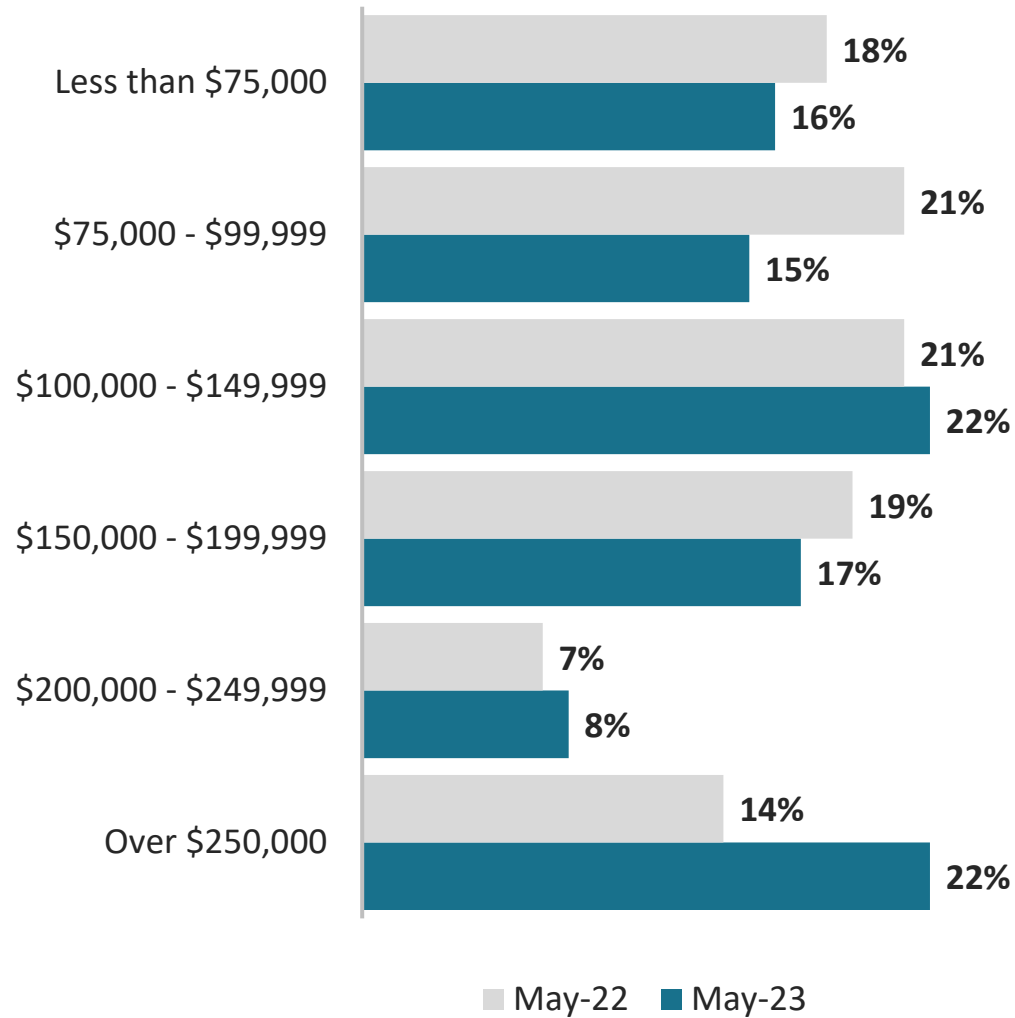
Race



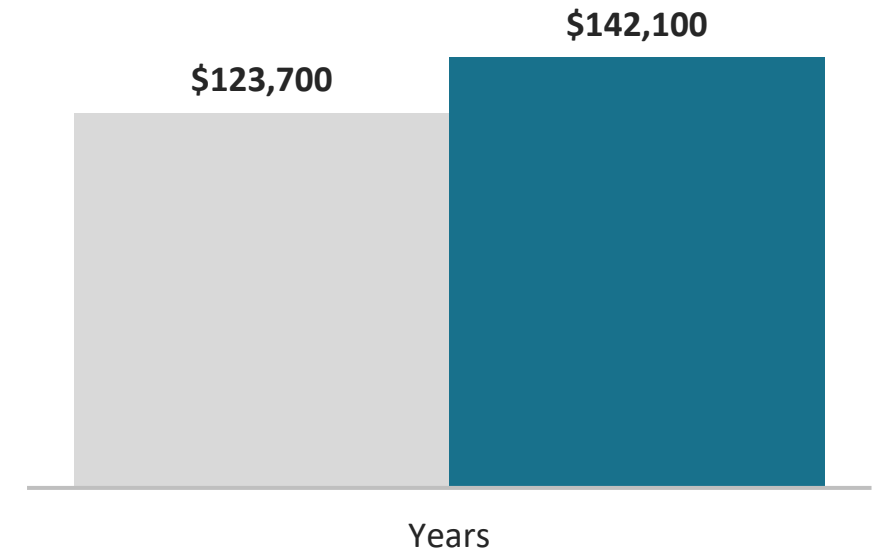
Gender



Income



Median Household Income



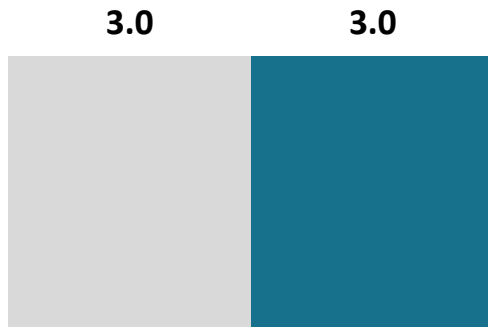
VISITOR JOURNEY: TRIP EXPERIENCE



TRIP CHARACTERISTICS

TRAVEL PARTY SIZE

3.0



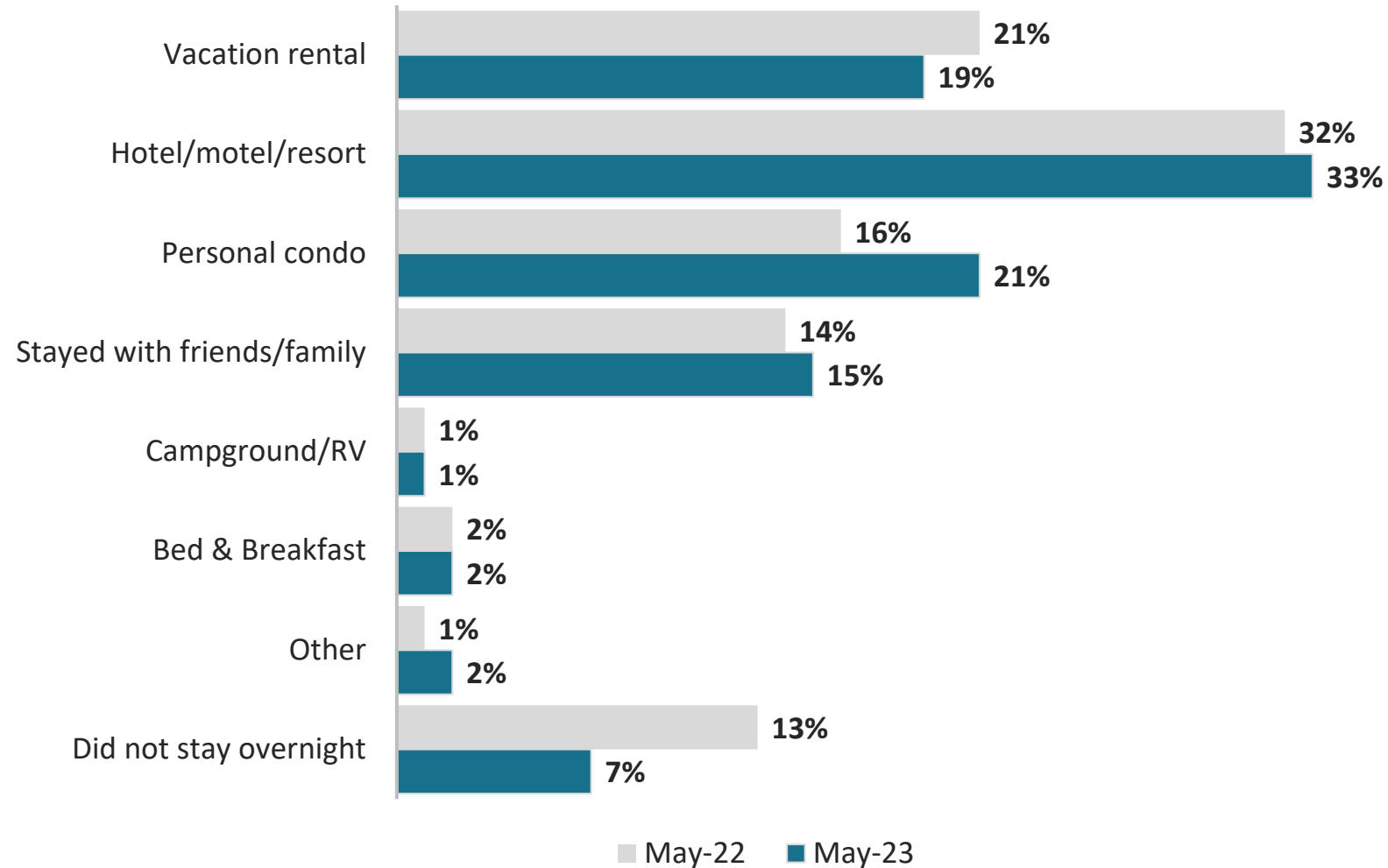
NIGHTS STAYED

6.3

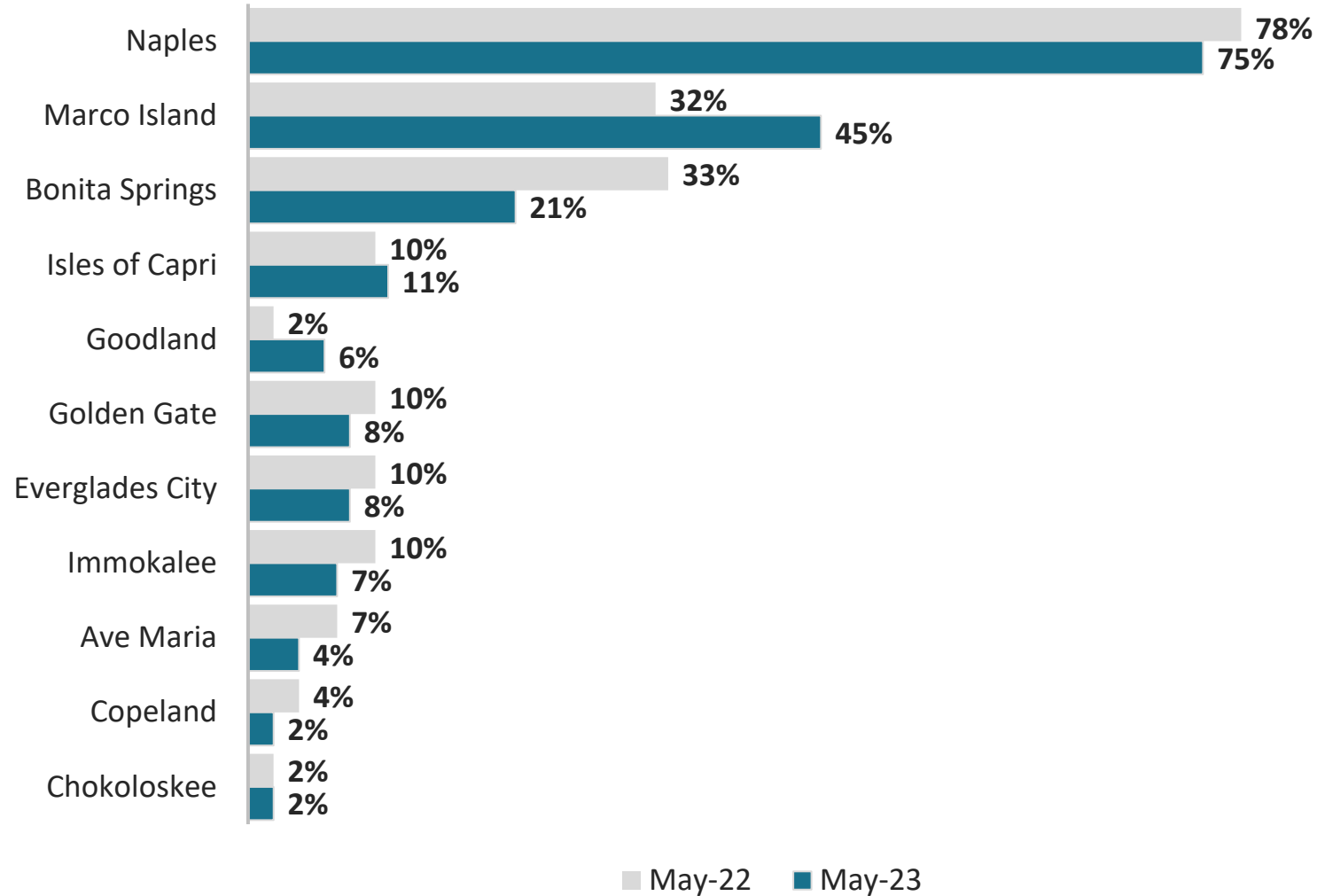


■ May-22 ■ May-23

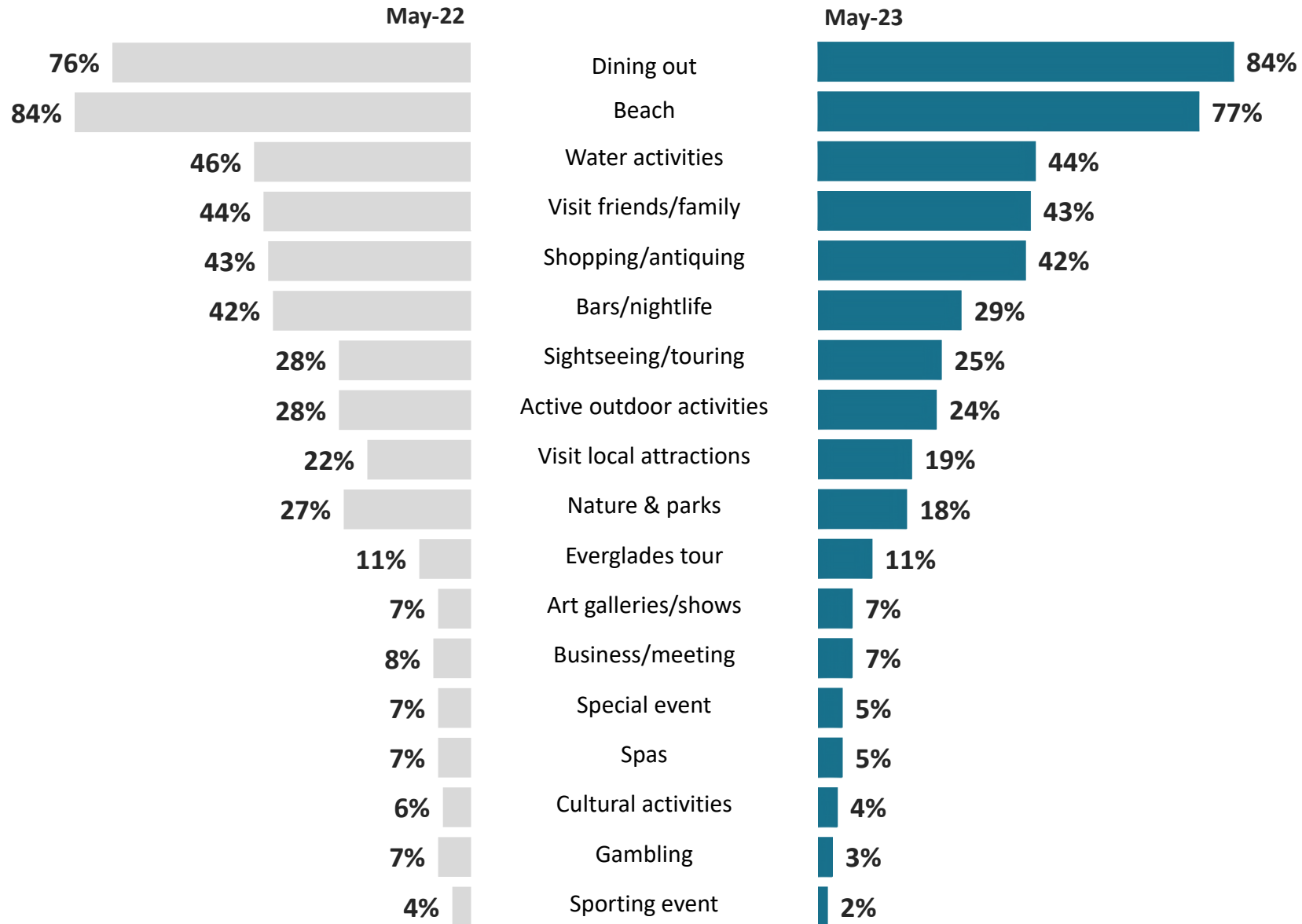
TYPE OF ACCOMMODATIONS



AREAS VISITED

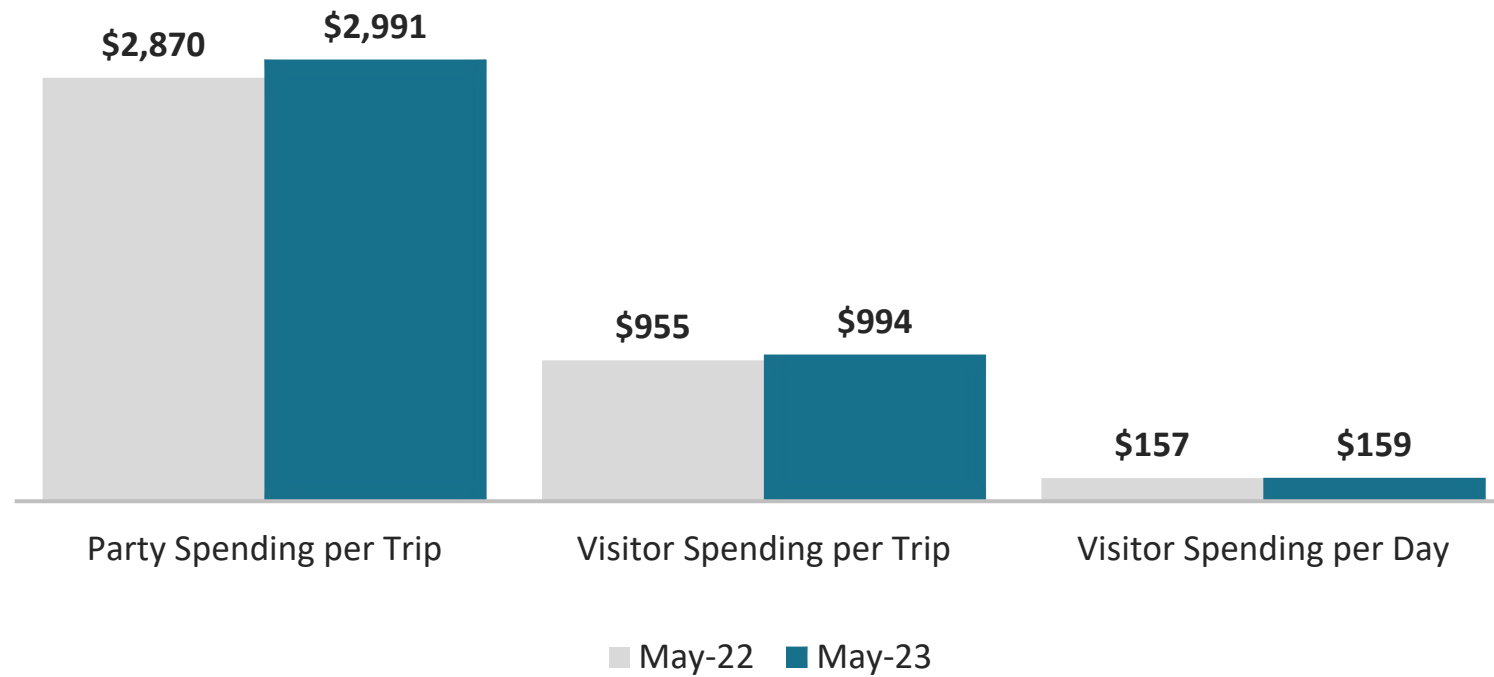


TRIP ACTIVITIES



¹ Multiple responses permitted.

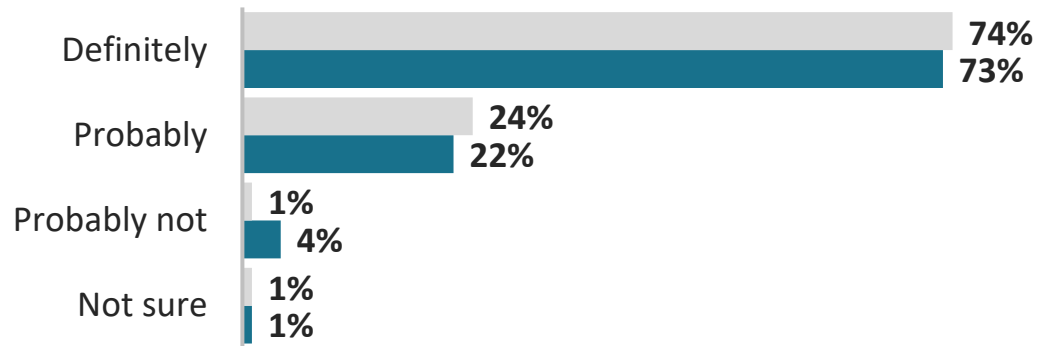
VISITOR SPENDING



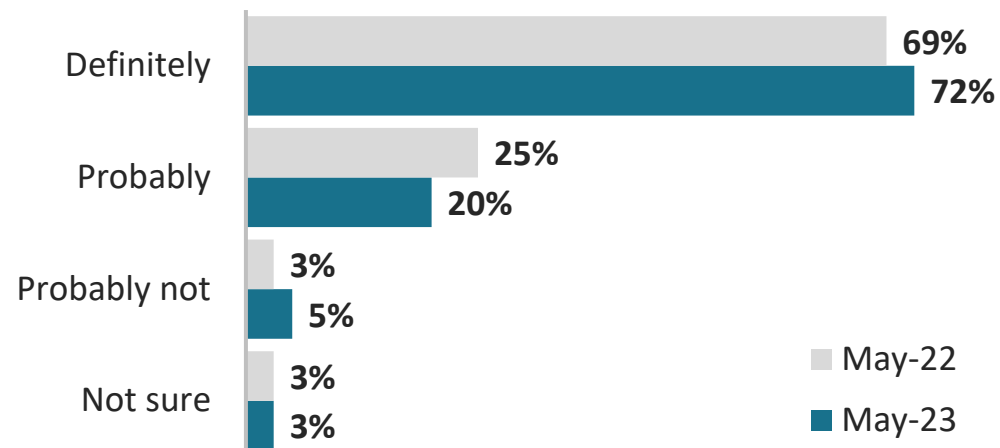
VISITOR JOURNEY: POST-TRIP EVALUATION



Will recommend the Naples area?



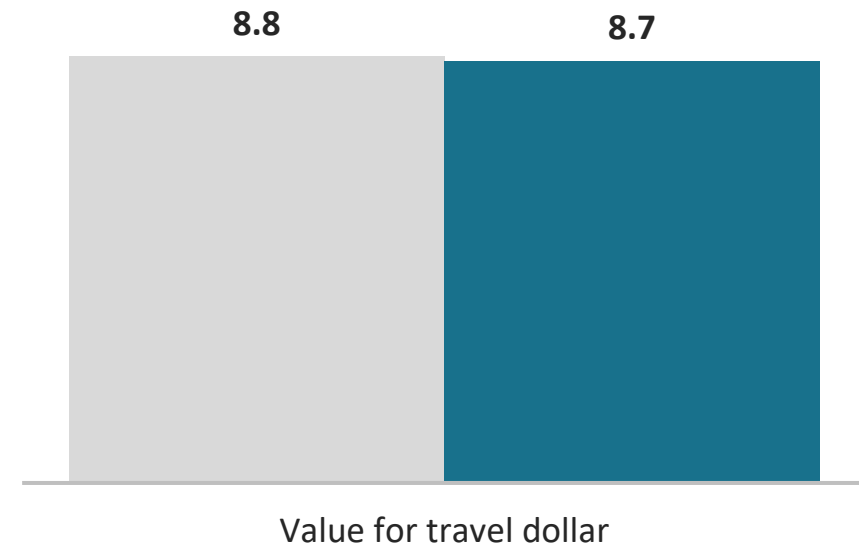
Will return to the Naples area?



■ May-22

■ May-23

VALUE FOR TRAVEL DOLLAR*



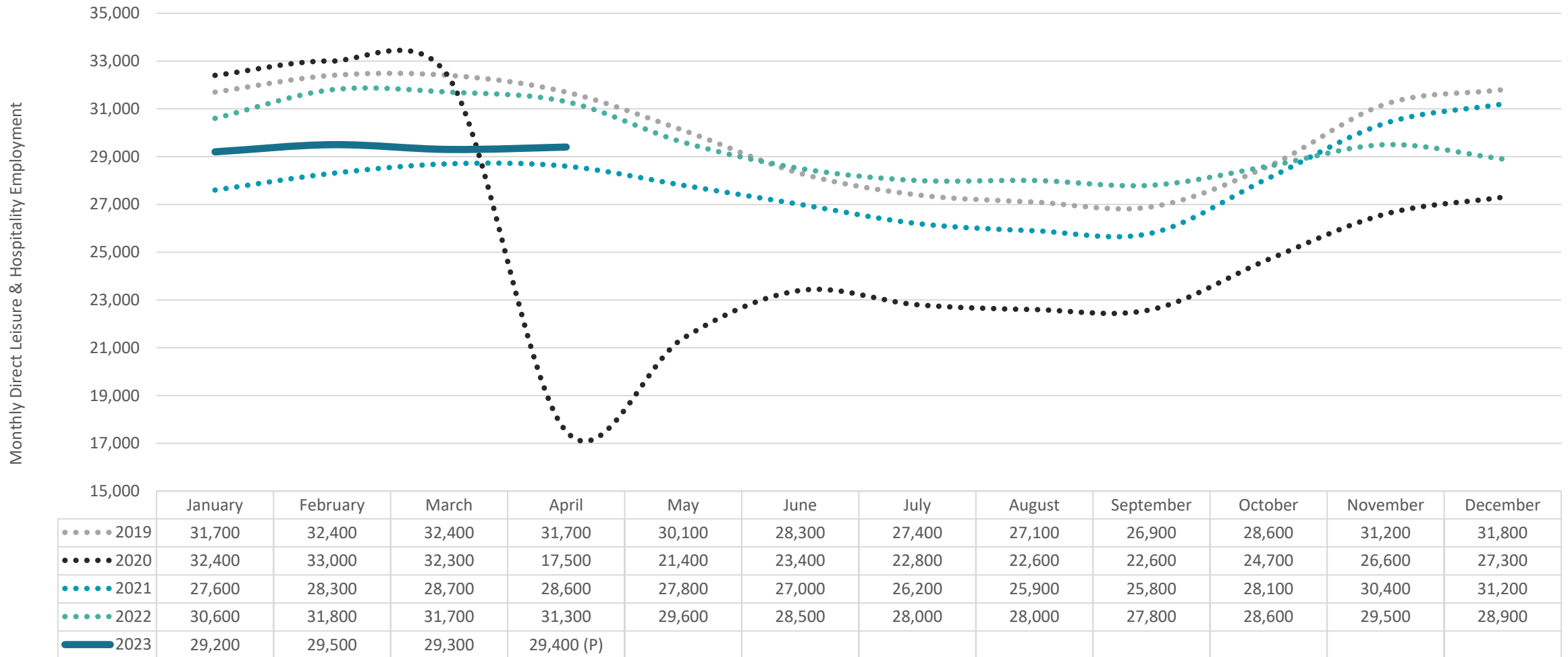
* 10-point scale where 10 is "excellent" and 1 is "poor".

INDUSTRY DATA



LEISURE & HOSPITALTY EMPLOYMENT

Collier County Direct Leisure and Hospitality Employment (Calendar Year)¹

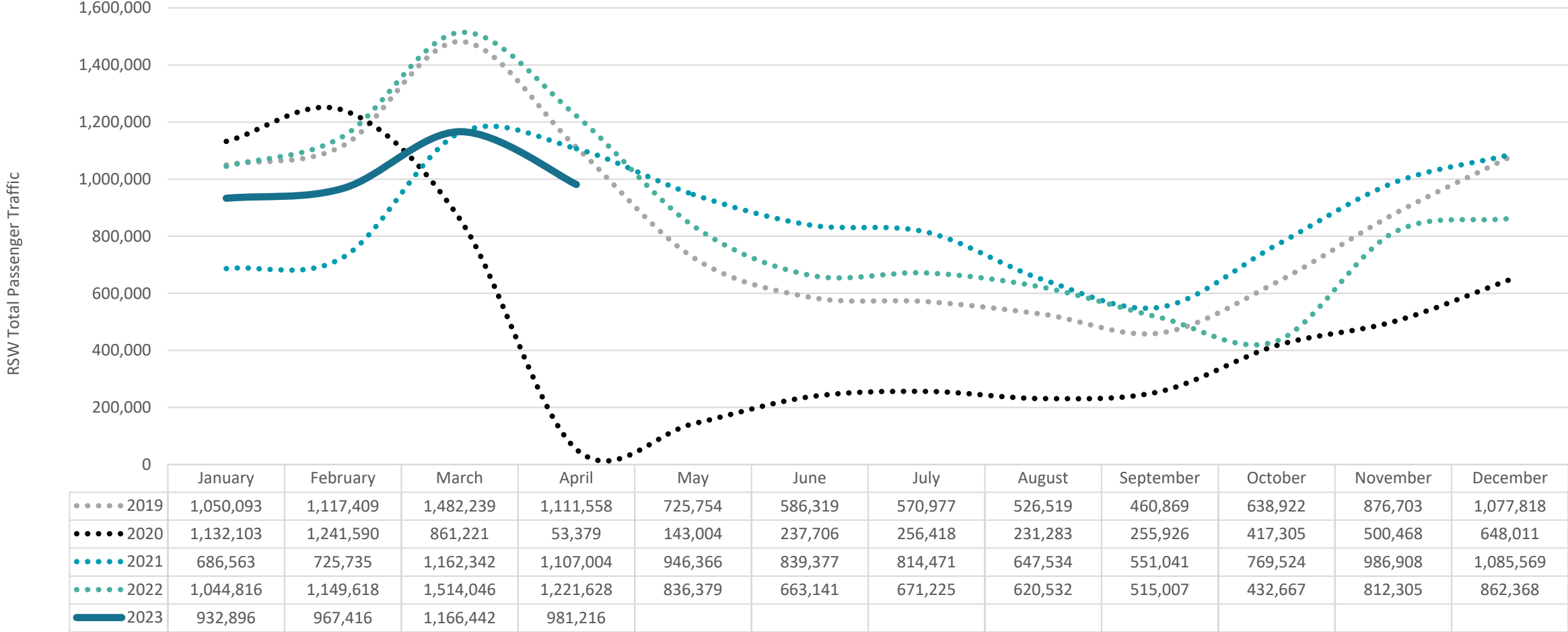


¹ SOURCE: Current Employment Statistic Program (CES), Collier County Leisure and Hospitality Sector, not seasonally adjusted.

(P) Preliminary.

RSW PASSENGER TRAFFIC

Southwest Florida International Airport (RSW) Passenger Traffic¹



¹ SOURCE: Lee County Port Authority Monthly Statistics.

LICENSED TRANSIENT RENTAL UNITS

May 2023 Licensed Transient Rental Units ¹				
	Hotel	Motel	Vacation Rental	Total
Naples	4,452	1,368	2,597	8,417
Marco Island	1,275	115	1,867	3,257
Golden Gate	0	150	104	254
Everglades City	38	36	16	90
Immokalee	0	70	3	73
Bonita Springs	0	5	32	37
Chokoloskee	0	13	2	15
Goodland	0	5	8	13
Ave Maria	0	0	4	4
Ochopee	0	0	1	1
Total	5,765	1,762	4,634	12,161²

¹SOURCE: [Florida Department of Business & Professional Regulation](#).

²Some units are still unavailable due to the impact of Hurricane Ian.

NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau
May 2023 Monthly Dashboard

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