

NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau
April - June 2023 Quarterly Report



STUDY OBJECTIVES: VISITOR JOURNEY

This report is organized along the visitor's journey, from planning stages to the impact of tourism.
Because of its importance, the impact of tourism is covered first.

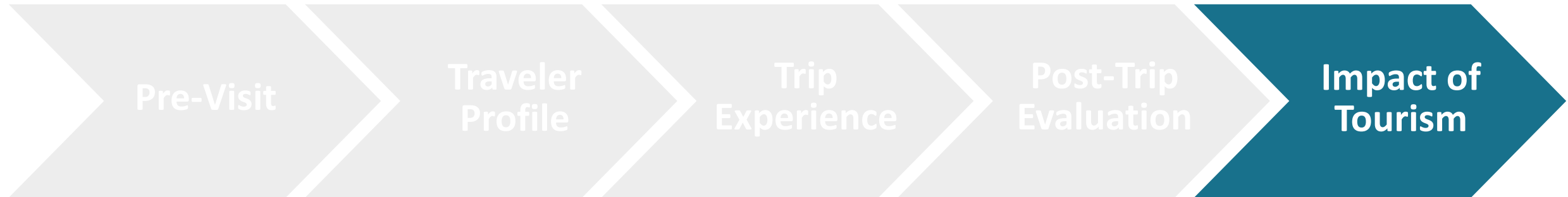




TOURISM PROGRESS REPORT

TOURISM PERFORMANCE METRICS

VISITOR JOURNEY: IMPACT OF TOURISM



SNAPSHOT: IMPACT OF TOURISM



During April-June of 2023, occupancy rates were down slightly compared to the same period in 2022. However, Average Daily Rate was down 11.3%, resulting in RevPAR and Economic Impact being down 17.1% and 24.7% respectively.



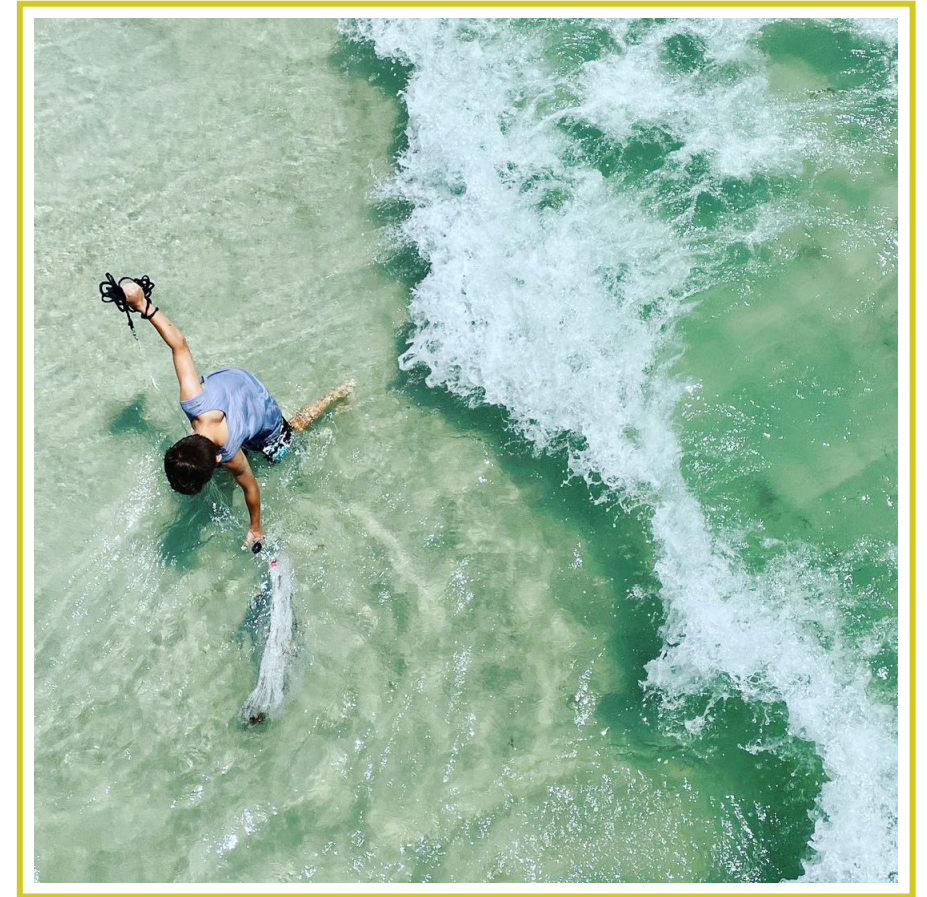
More visitors recalled and were influenced by advertising in April - June 2023 compared to the same period during the previous year.



Value for travel dollar ratings dropped from 9.1 to 8.6, however, the ratings continue to rebound, as 8.6 is the highest quarterly rating seen since July-September of 2022.



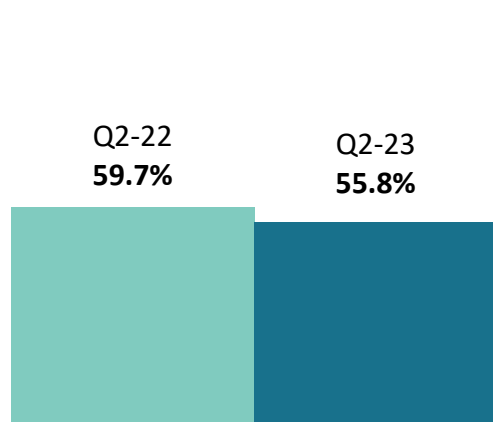
More loyal visitors, visitors who have come to area more than 10 times, visited the Paradise Coast in April-June 2023.



LODGING METRICS¹

OCCUPANCY RATE

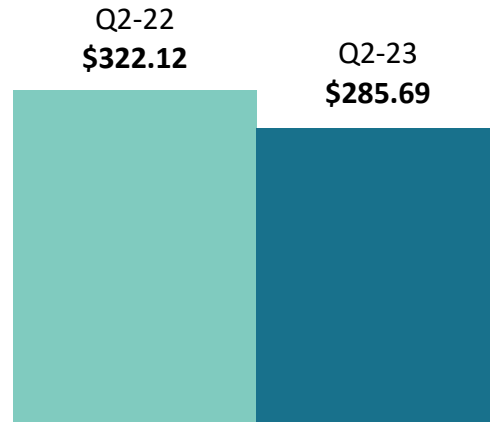
55.8%



- 6.5% from 2022

AVERAGE DAILY RATE

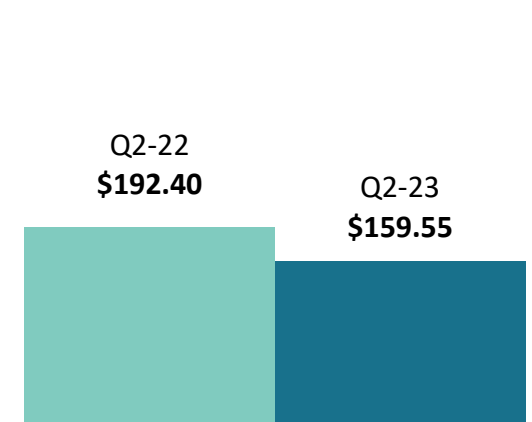
\$285.69



- 11.3% from 2022

REVENUE PER AVAILABLE ROOM

\$159.55

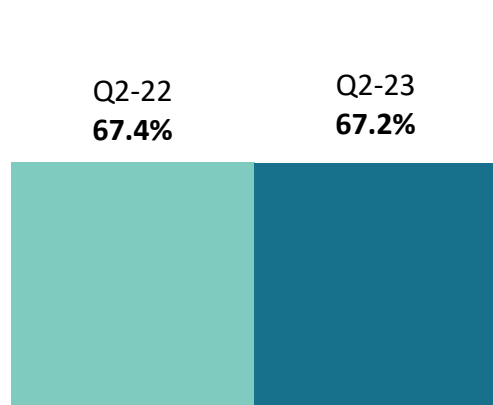


- 17.1% from 2022

¹ Sources: STR,
AllTheRooms, and
DSG Occupancy Study

OCCUPANCY RATE

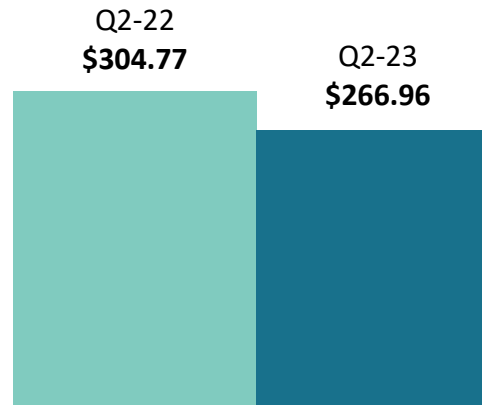
67.2%



- 0.2% from 2022

AVERAGE DAILY RATE

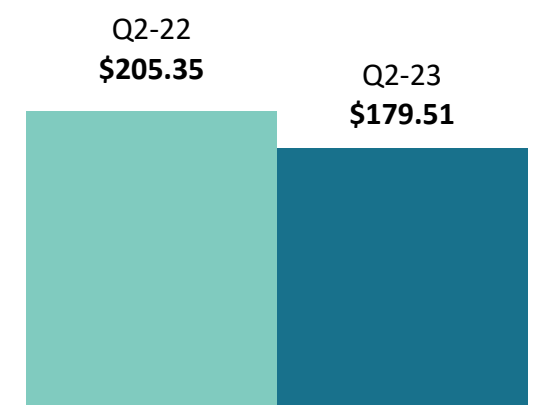
\$266.96



- 12.4% from 2022

REVENUE PER AVAILABLE ROOM

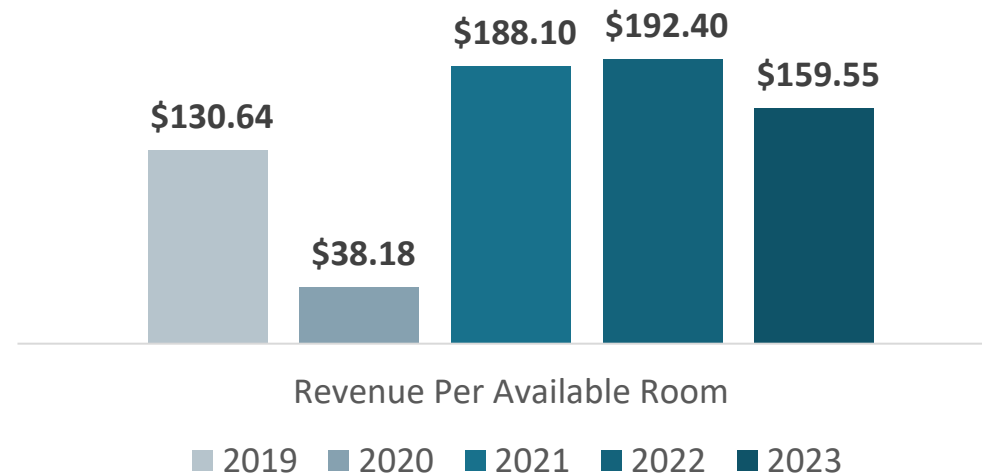
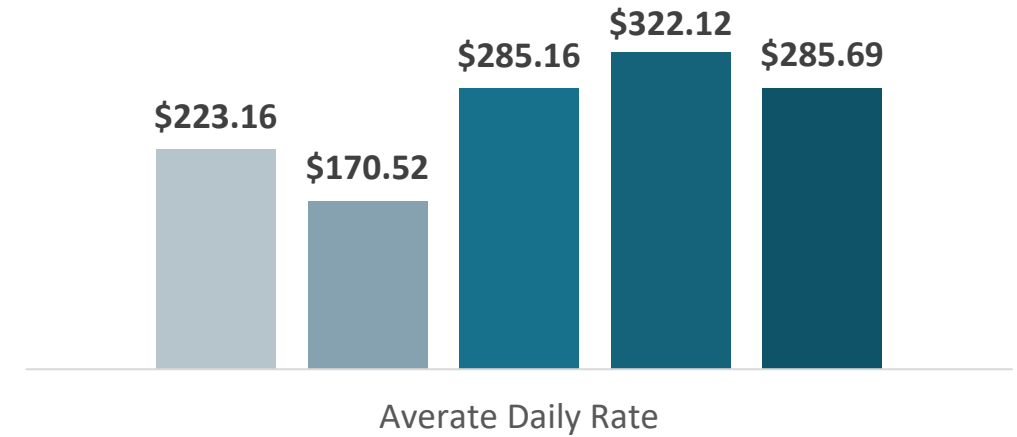
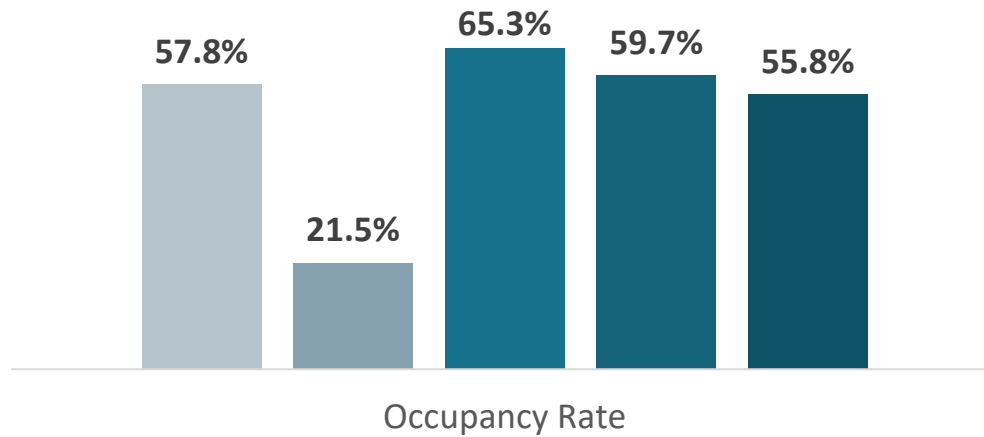
\$179.51



- 12.6% from 2022

¹Source: STR Reports

Q2 2019-2023 OVERALL LODGING METRICS¹



¹ Sources: STR, AllTheRooms, and DSG Occupancy Study

Q2-2023 VISITATION & ROOM NIGHTS

VISITORS

666,600

Q2-22
847,500

Q2-23
666,600

- 21.3% from 2022

ROOM NIGHTS

589,200

Q2-22
677,900

Q2-23
589,200

- 13.1% from 2022

VISITOR DAYS

4,508,500

Q2-22
5,294,400

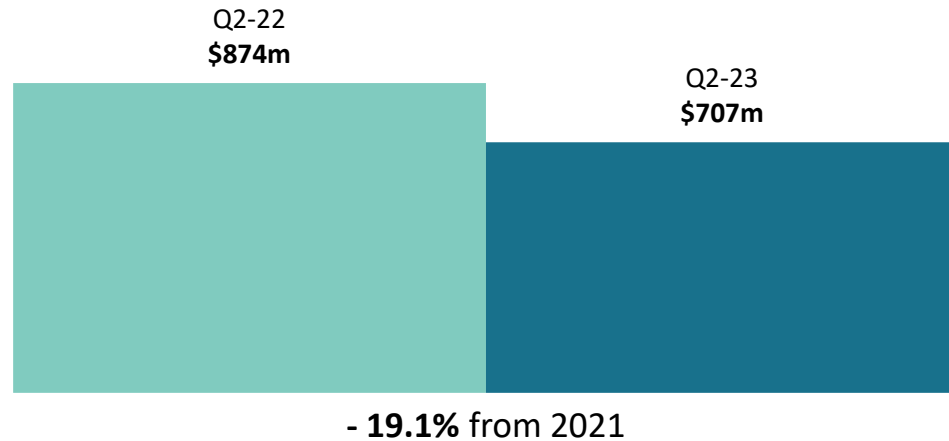
Q2-23
4,508,500

- 14.8% from 2022

Q2-2023 SPENDING & ECONOMIC IMPACT

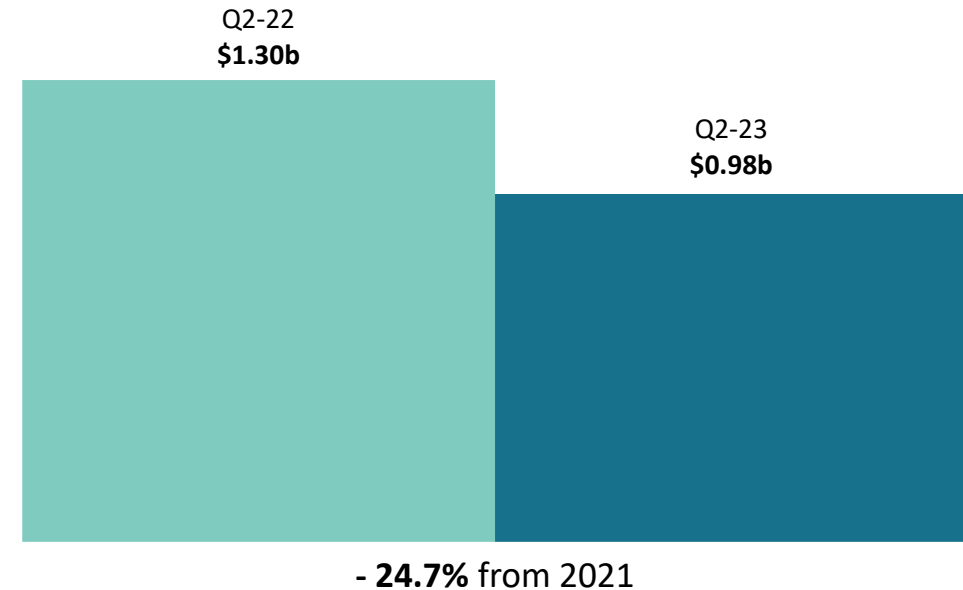
DIRECT SPENDING

\$706,742,500



ECONOMIC IMPACT

\$980,958,500



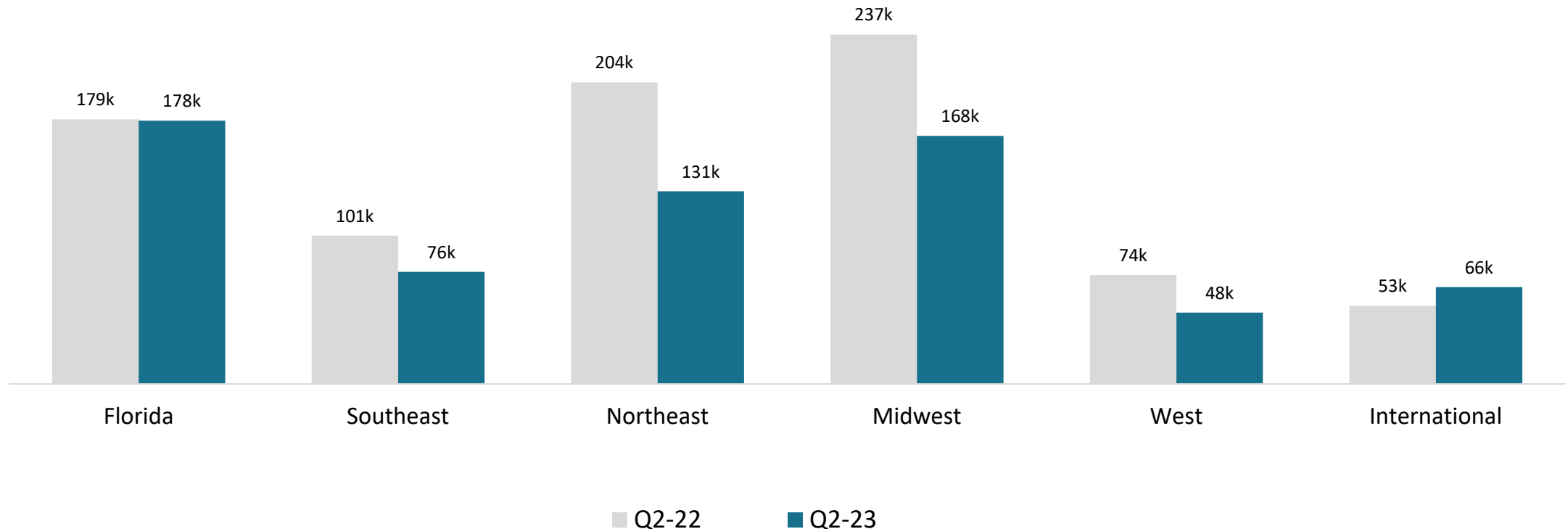
VISITOR ORIGIN

FLORIDA VISITORS

178,300

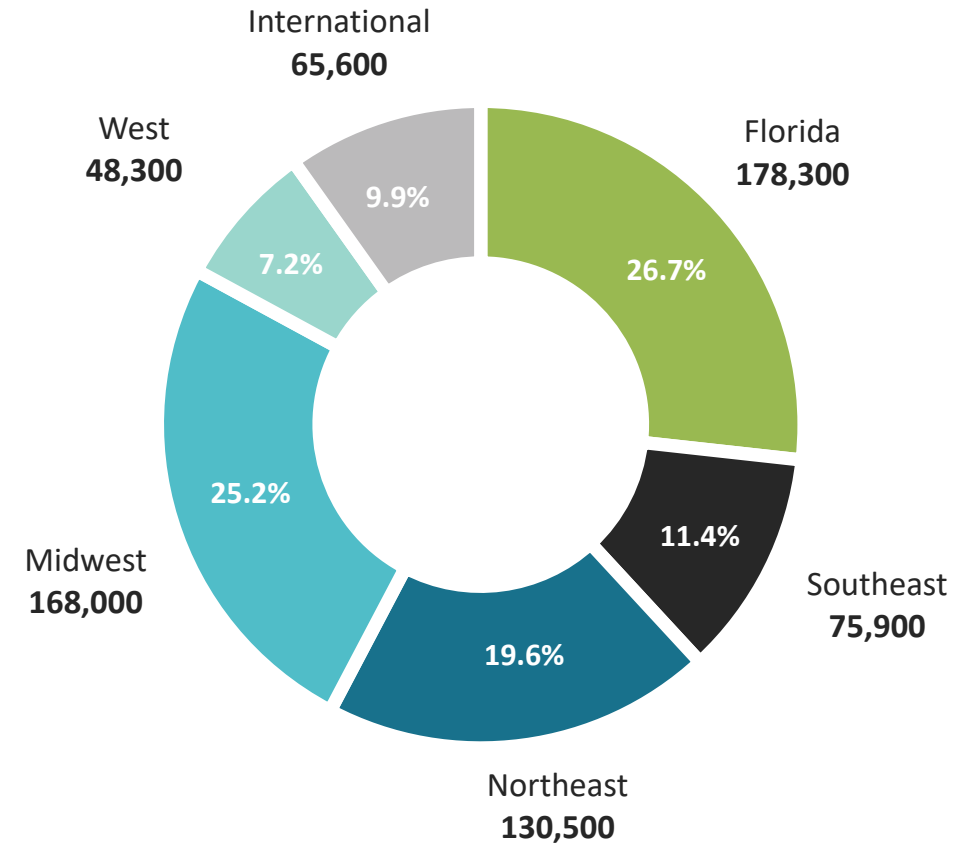
OUT-OF-STATE VISITORS

488,300

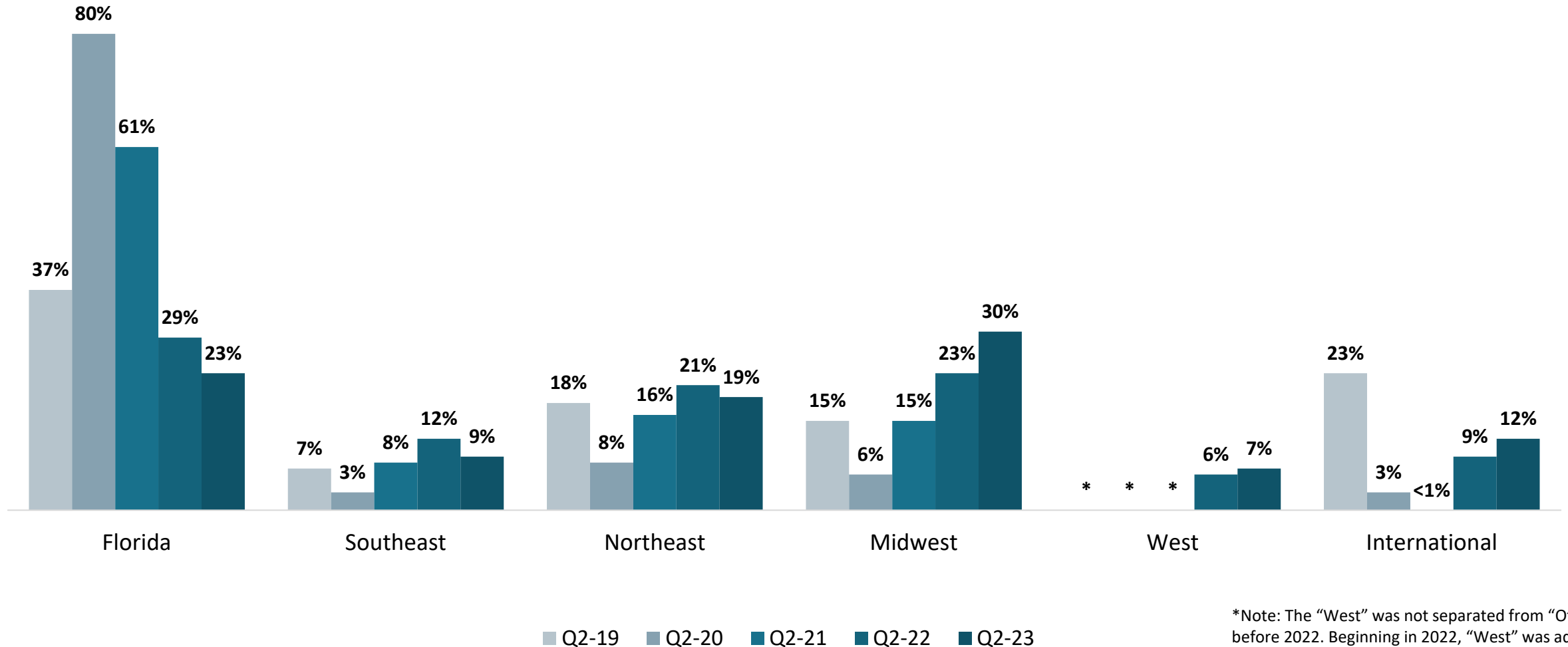


VISITOR ORIGIN REGIONS

Region	Q2 2022		Q2 2023		Percent Change (Δ%)	
	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	179,300	21.2%	178,300	26.7%	- 0.6%	+ 25.9%
Southeast	100,500	11.9%	75,900	11.4%	- 24.5%	- 4.2%
Northeast	204,300	24.1%	130,500	19.6%	- 36.1%	- 18.7%
Midwest	236,700	27.9%	168,000	25.2%	- 29.0%	- 9.7%
West	73,700	8.7%	48,300	7.2%	- 34.5%	- 17.2%
Canada	21,300	2.5%	36,800	5.5%	+ 72.8%	+ 120.0%
Europe	23,200	2.7%	13,700	2.1%	- 40.9%	- 22.2%
UK	(2,500)	(0.3%)	(1,500)	(0.2%)	- 40.0%	- 33.3%
Germany	(3,100)	(0.4%)	(1,800)	(0.5%)	- 41.9%	+ 25.0%
Other Europe	(17,600)	(2.0%)	(10,400)	(1.4%)	- 40.9%	- 30.0%
C/S America	2,700	0.3%	7,900	1.2%	+ 192.6%	+ 300.0%
Other	5,800	0.7%	7,200	1.1%	+ 24.1%	+ 57.1%
Total	847,500	100.0%	666,600	100.0%		



Q2 2019-2023 OVERNIGHT VISITOR ORIGIN



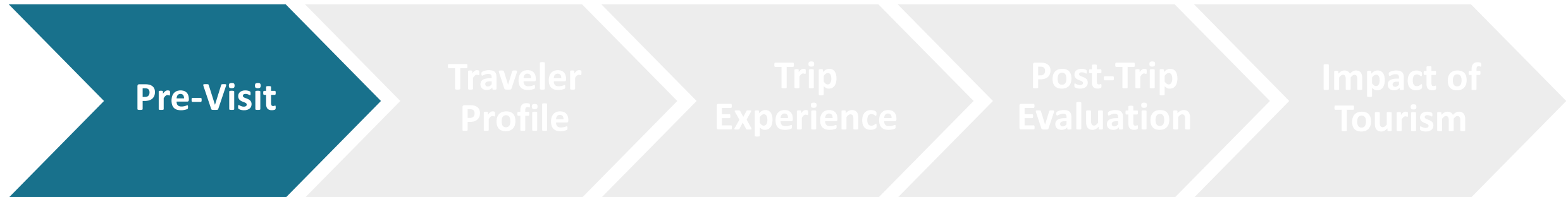
*Note: The "West" was not separated from "Other" before 2022. Beginning in 2022, "West" was added and "Other" was changed to "Other International".



TOPLINE FINDINGS



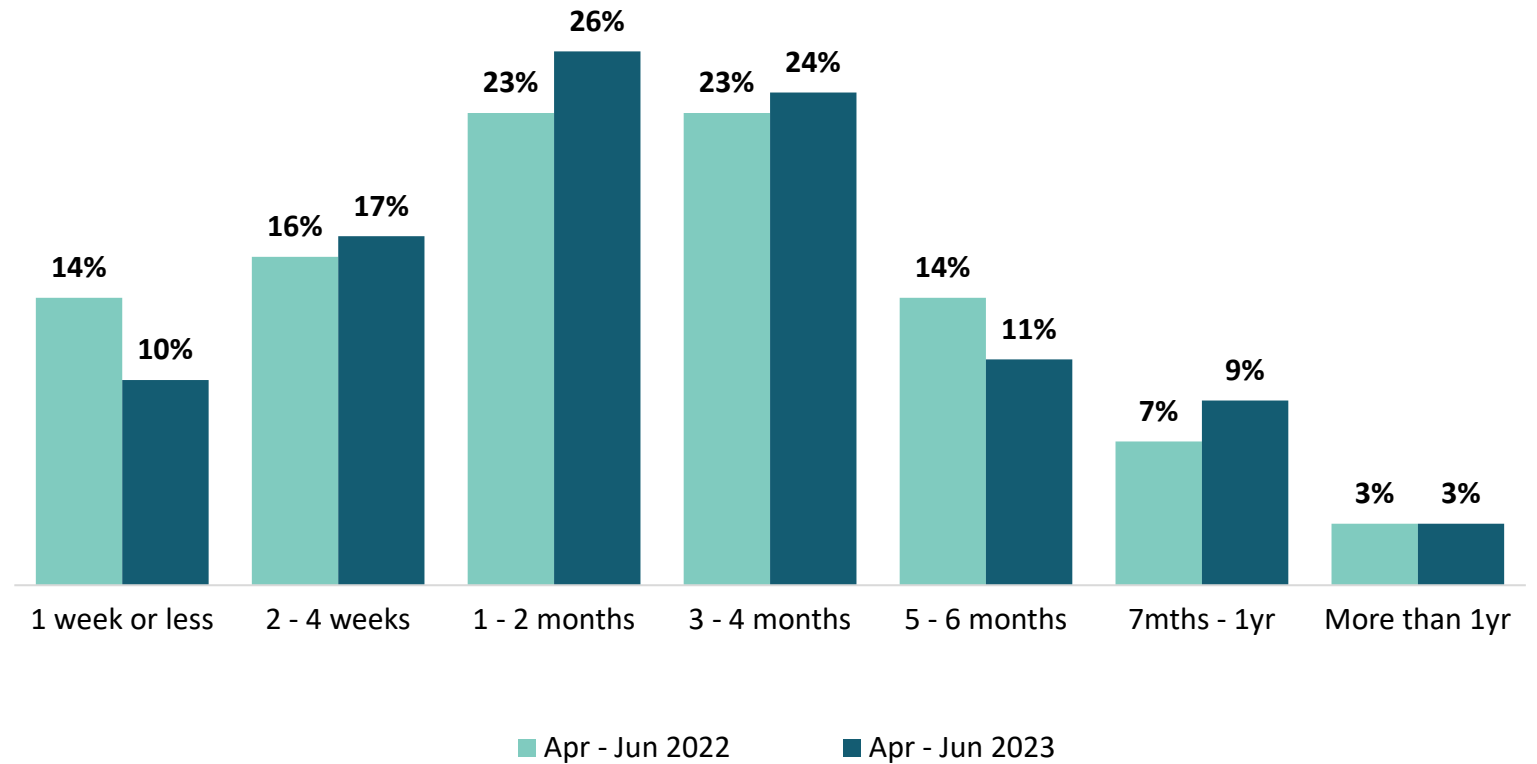
VISITOR JOURNEY: PRE-VISIT



TRIP PLANNING CYCLE



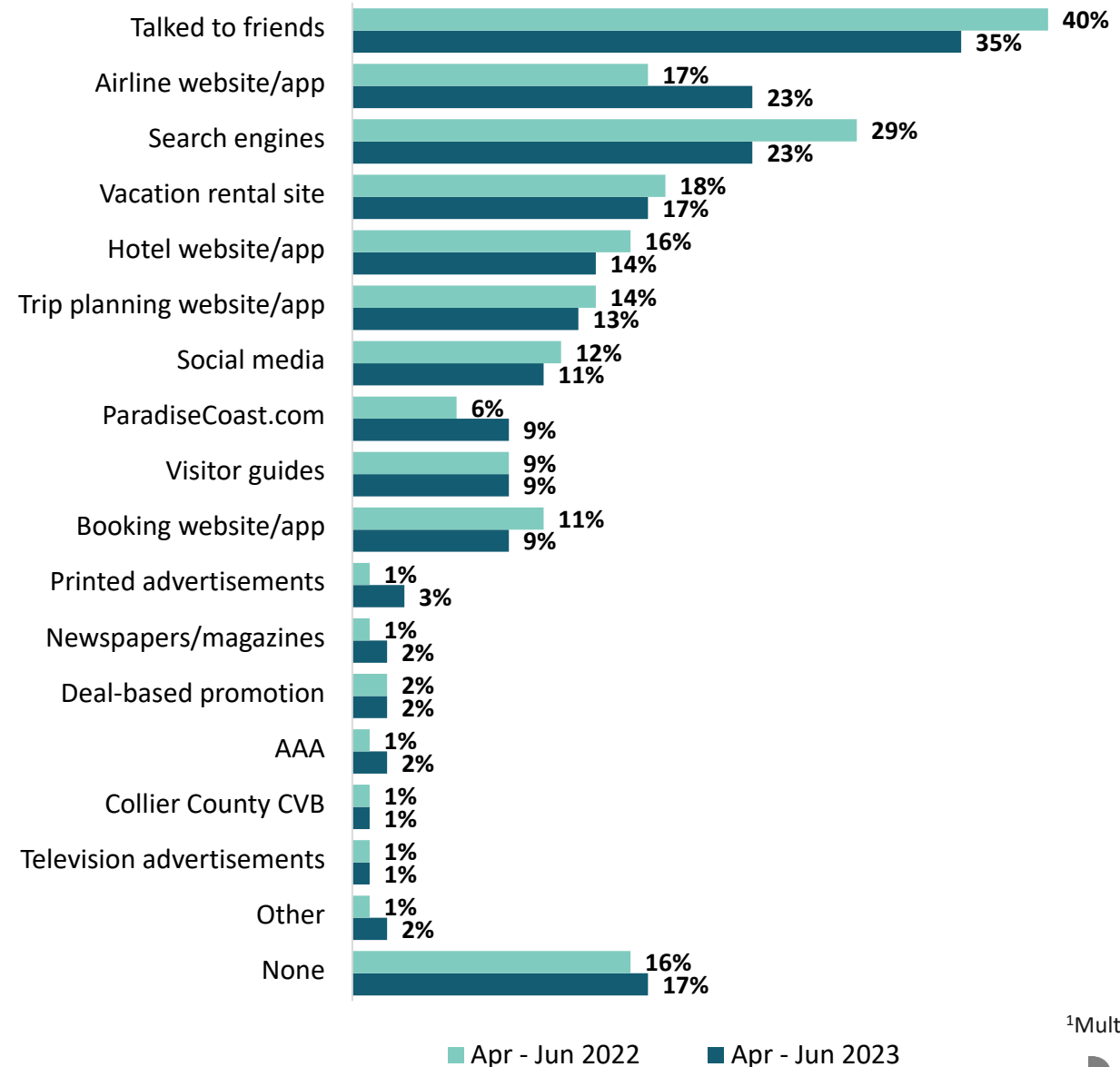
Typical visitors to the Naples, Marco Island, Everglades area planned their trip 57 days in advance



TOP TRIP PLANNING RESOURCES¹



Visitors to the Naples, Marco Island, Everglades area relied heavily on talking to friends/family, airline sites/apps, and online search engines to plan their trips prior to arriving in the area

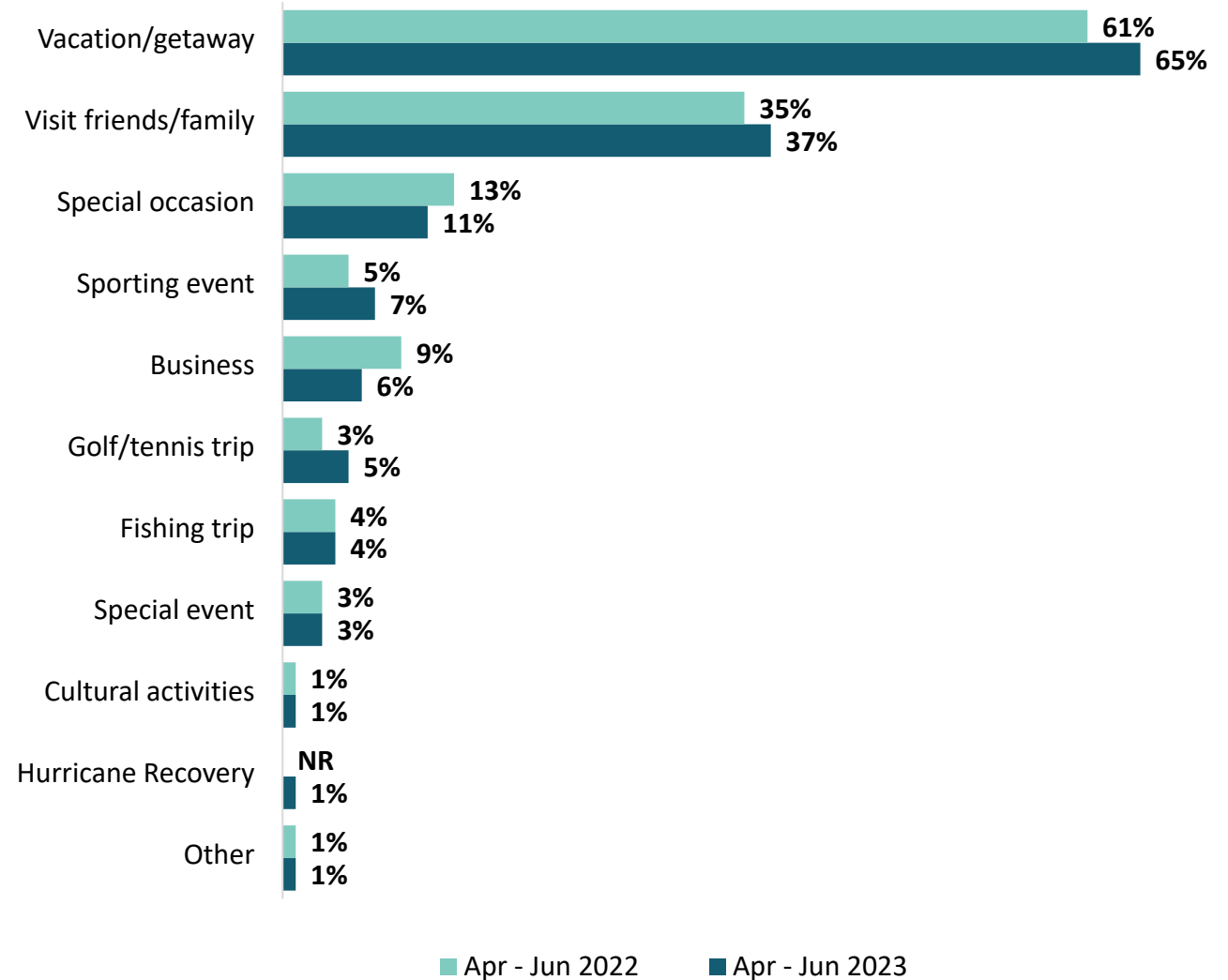


¹Multiple responses permitted.

TOP REASONS FOR VISITING¹



Visitors overwhelmingly traveled to the Naples, Marco Island, Everglades area for a vacation or getaway

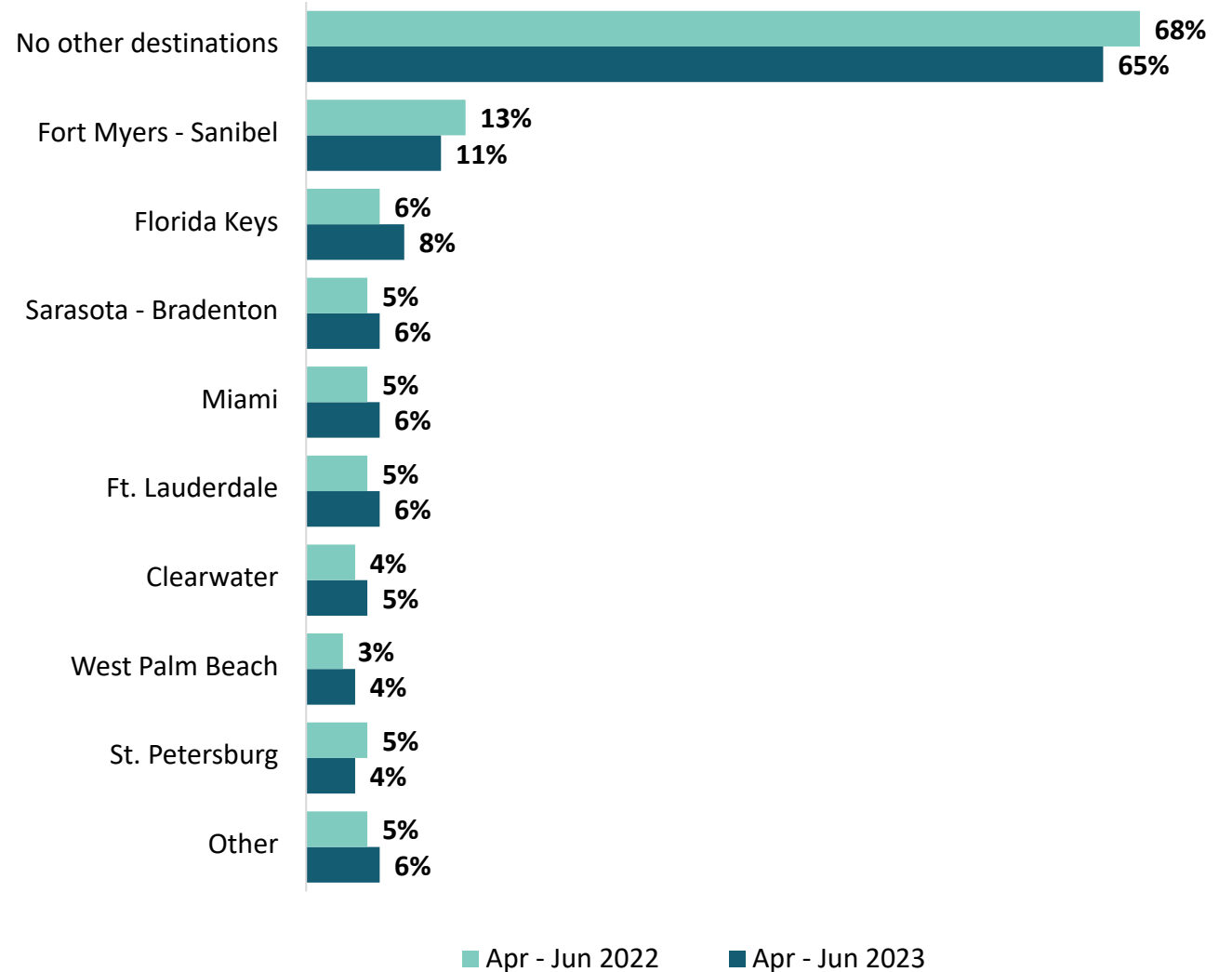


¹Multiple responses permitted.

TOP OTHER DESTINATIONS CONSIDERED¹



Nearly 2 in 3 visitors did not consider any alternatives to the Naples, Marco Island, Everglades area when selecting a trip destination

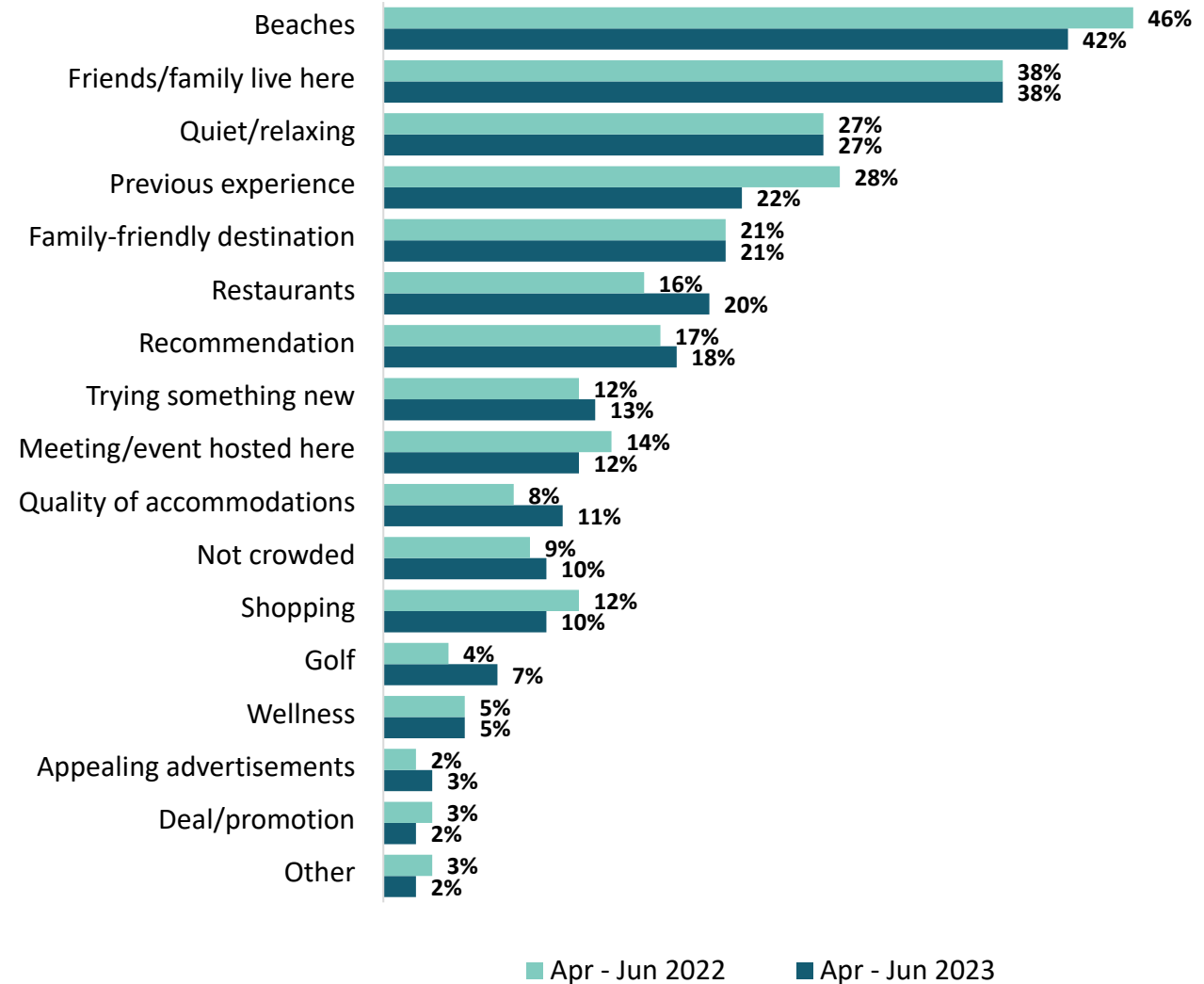


¹Multiple responses permitted.

TOP REASONS FOR CHOOSING DESTINATION¹



Over 2 in 5 visitors chose the Naples, Marco Island, Everglades area over other destinations because of its beaches



¹Multiple responses permitted.



3 in 5 visitors flew to the Naples, Marco Island, Everglades area



Most visitors who flew used Southwest Florida International Airport (RSW)



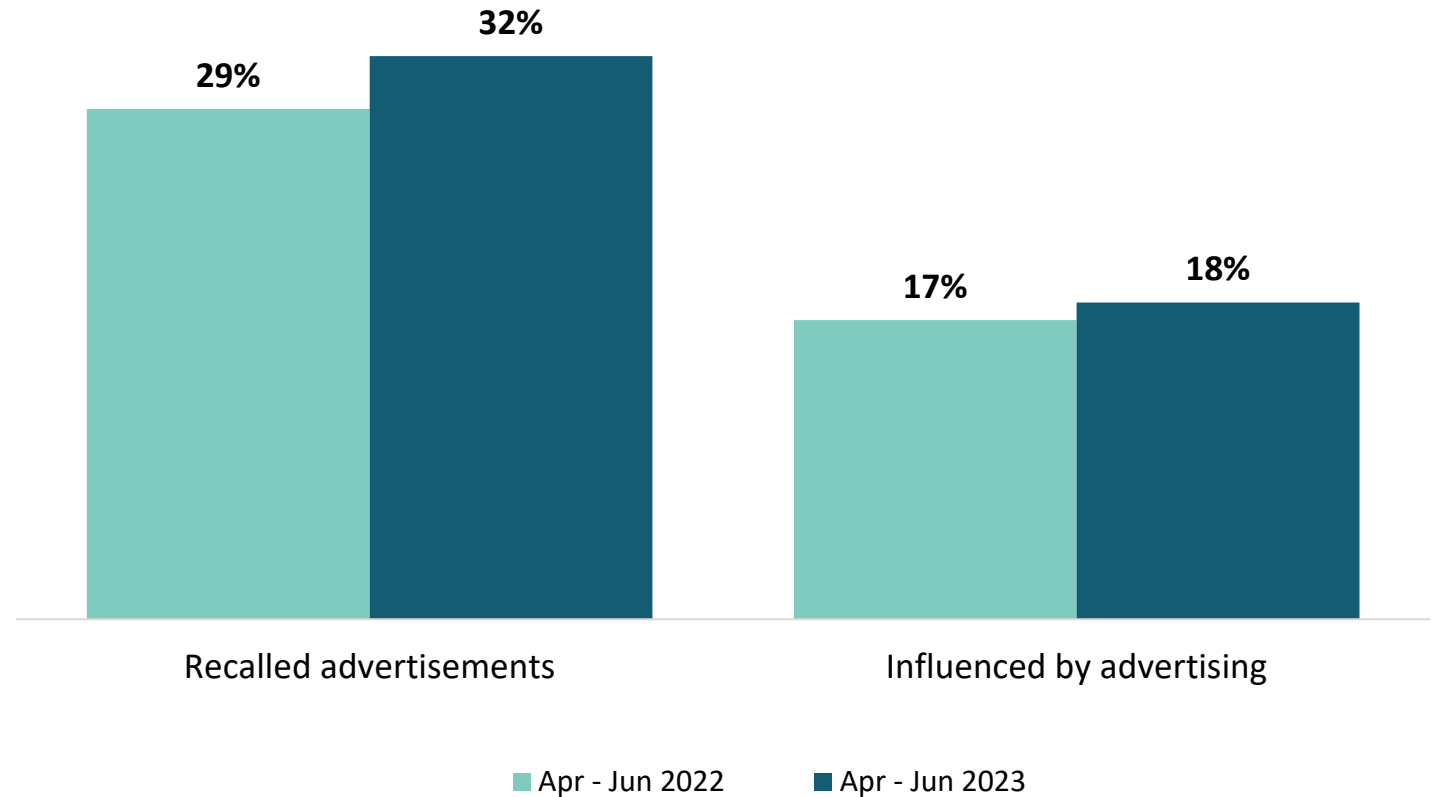
ADVERTISING RECALL & INFLUENCE



Nearly 1 in 3 visitors recalled reading, seeing, or hearing advertising for the Naples area prior to their trip



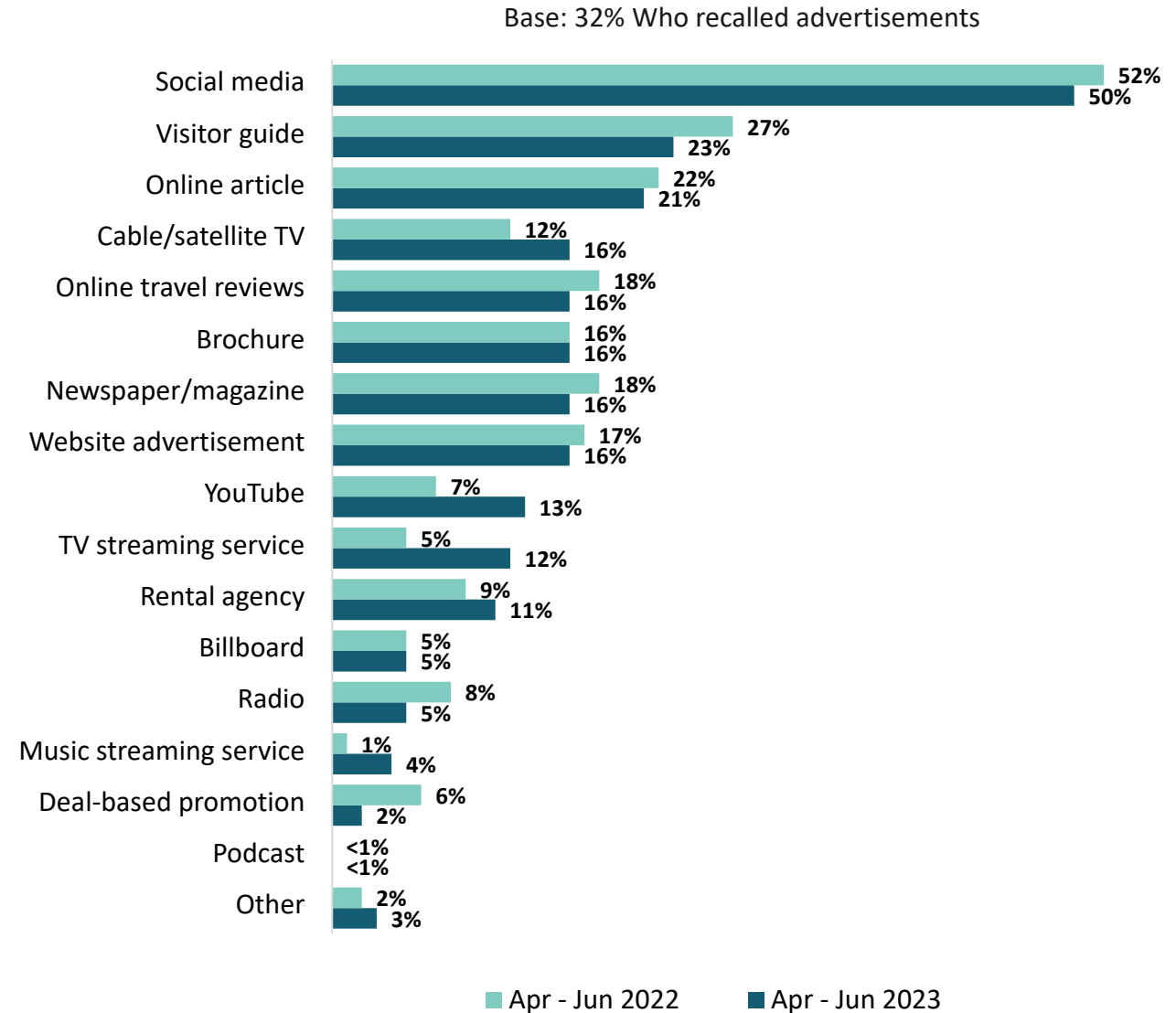
Nearly 1 in 5 visitors reported that advertising directly influenced their decision to visit the Naples area



TOP SOURCES OF ADVERTISING RECALL¹

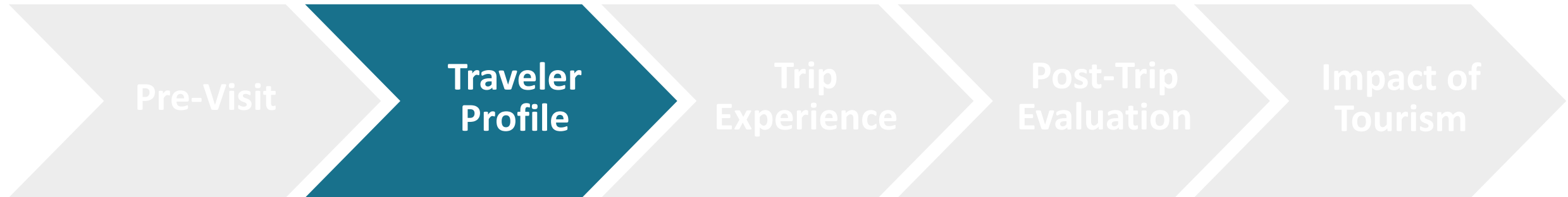


Half of visitors who recalled advertisements for the Naples area recalled social media advertising



¹Multiple responses permitted.

VISITOR JOURNEY: TRAVELER PROFILE



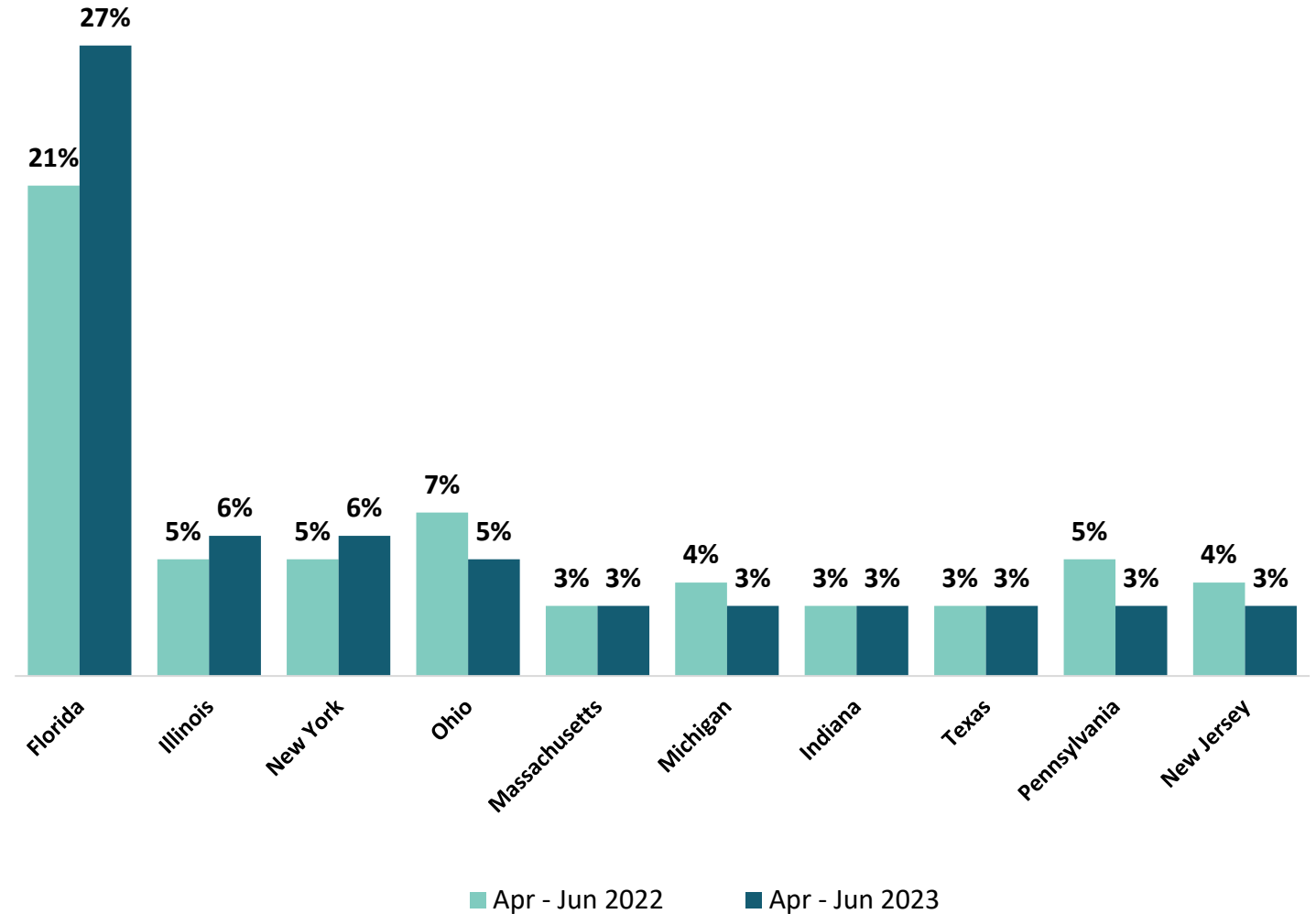
TOP ORIGIN STATES



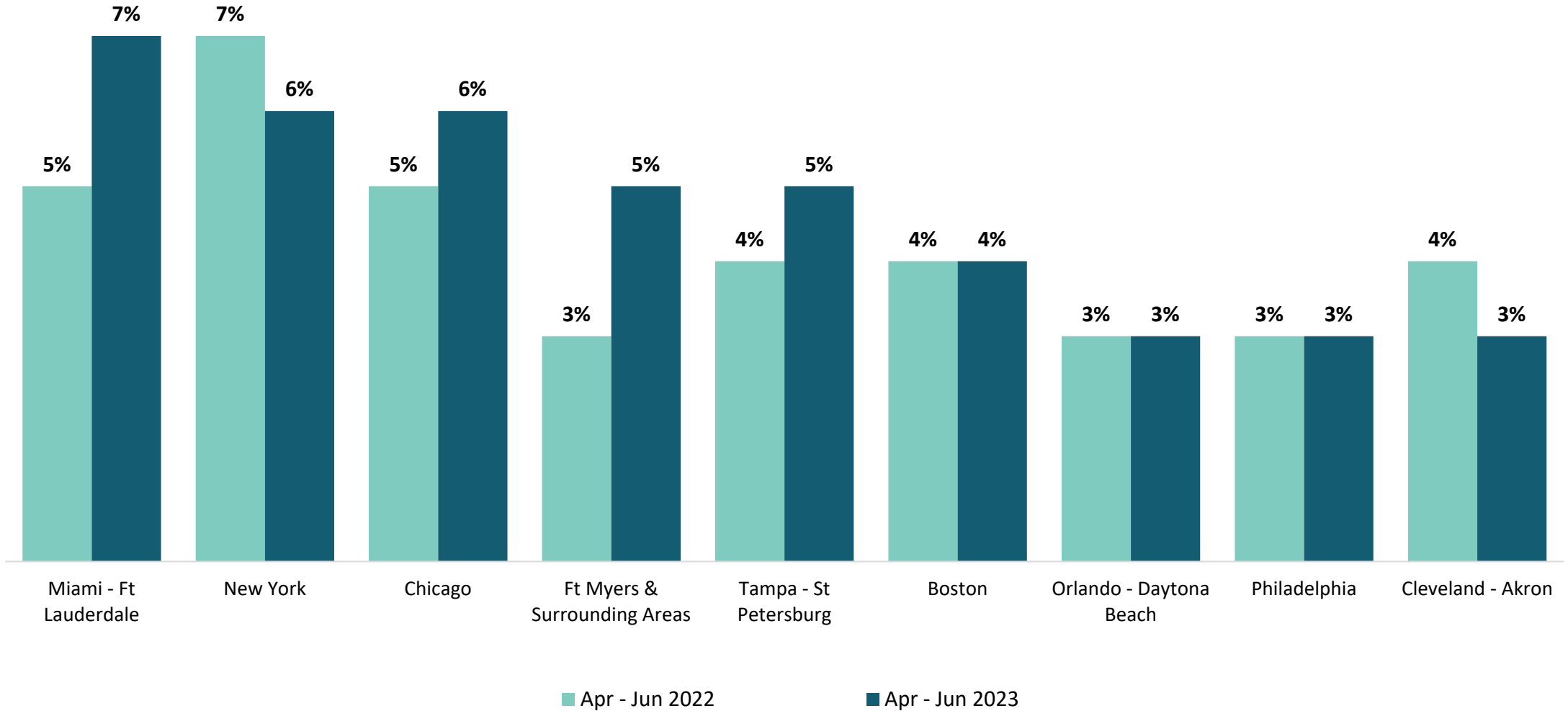
Over 1 in 4 visitors who traveled to the Naples, Marco Island, Everglades area were from another part of Florida.



10 U.S. States accounted for over 3 in 5 visitors who traveled to the Naples, Marco Island, Everglades area.



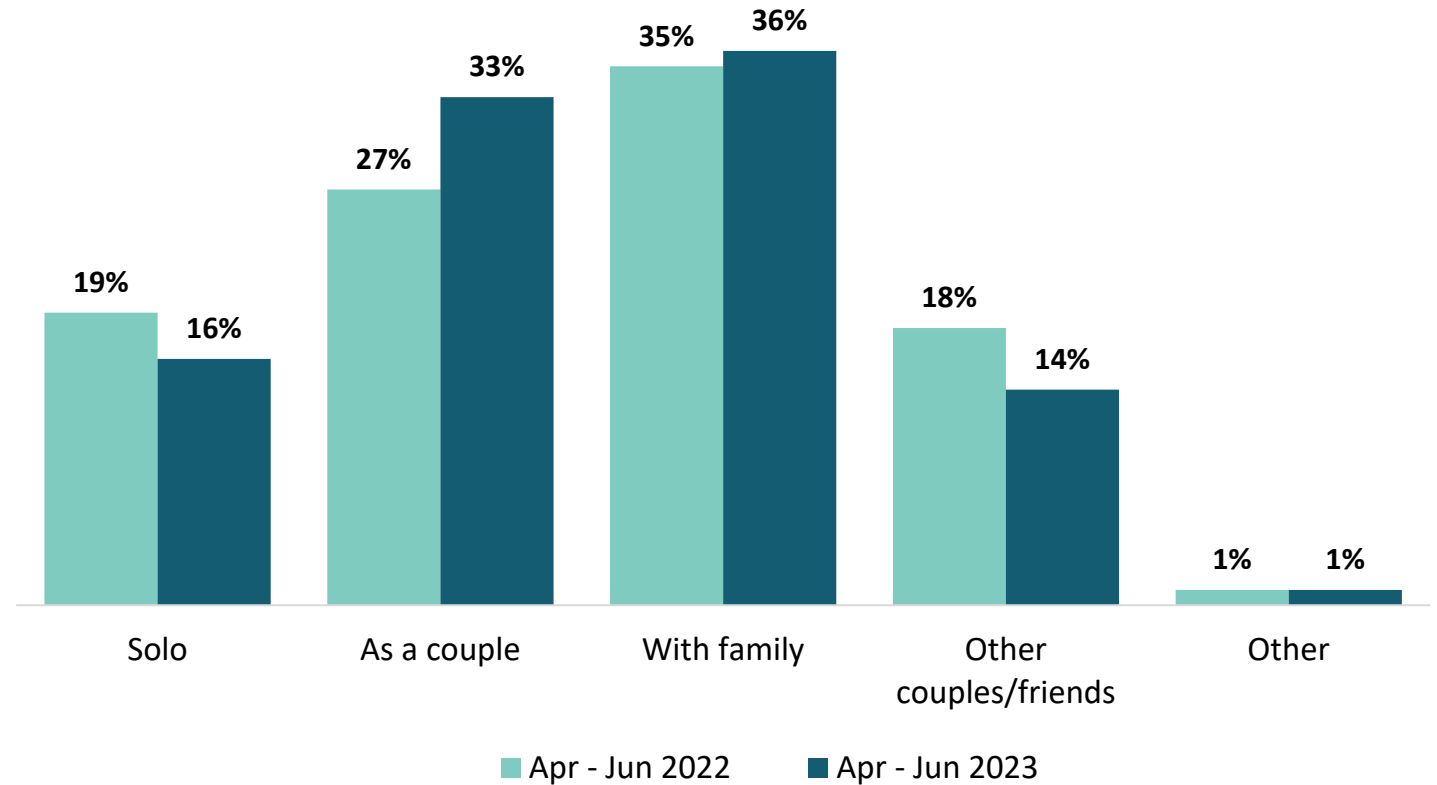
TOP ORIGIN MARKETS



TRAVEL PARTY COMPOSITION



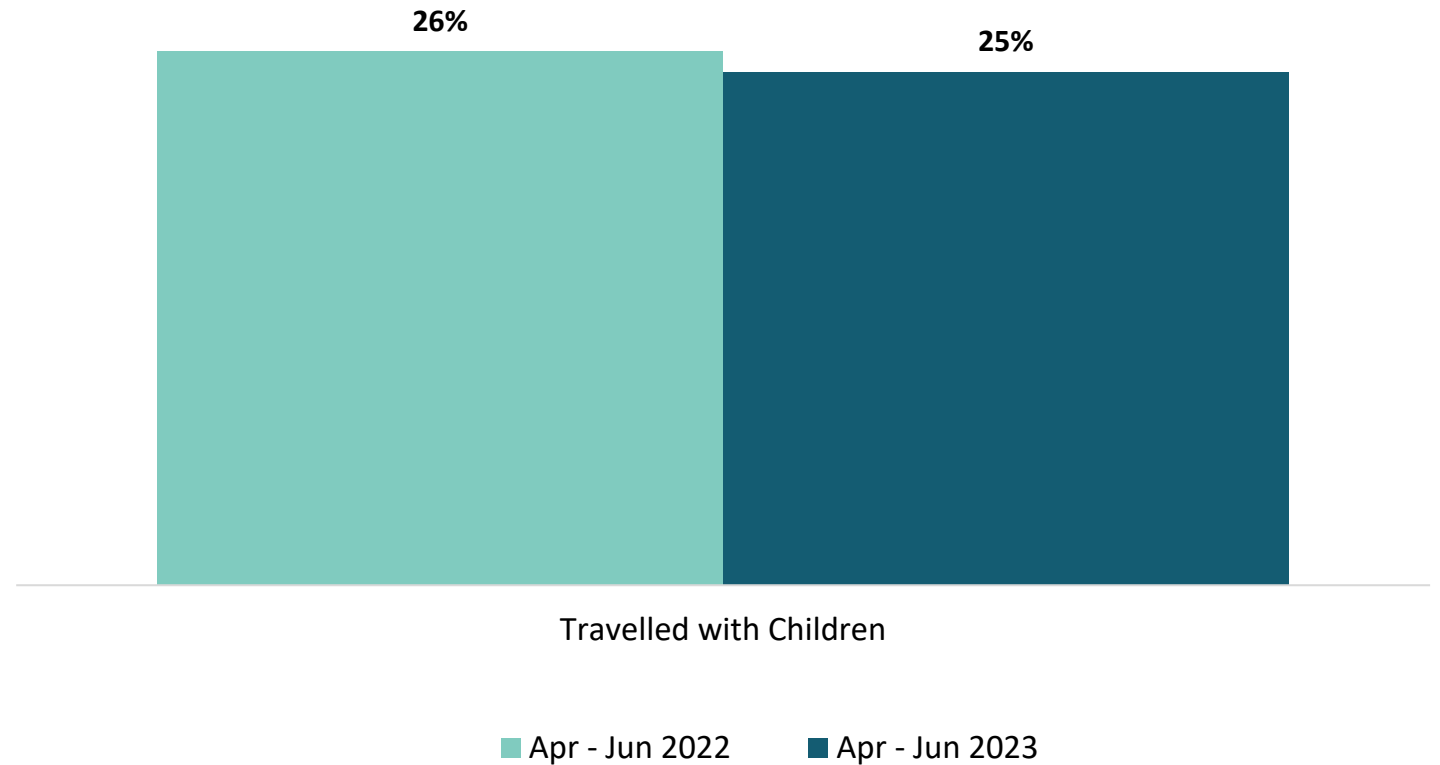
Typical visitors traveled to the Naples, Marco Island, Everglades area in parties of 3.2 people and over 1 in 3 visitors traveled with family



CHILDREN IN TRAVEL PARTY



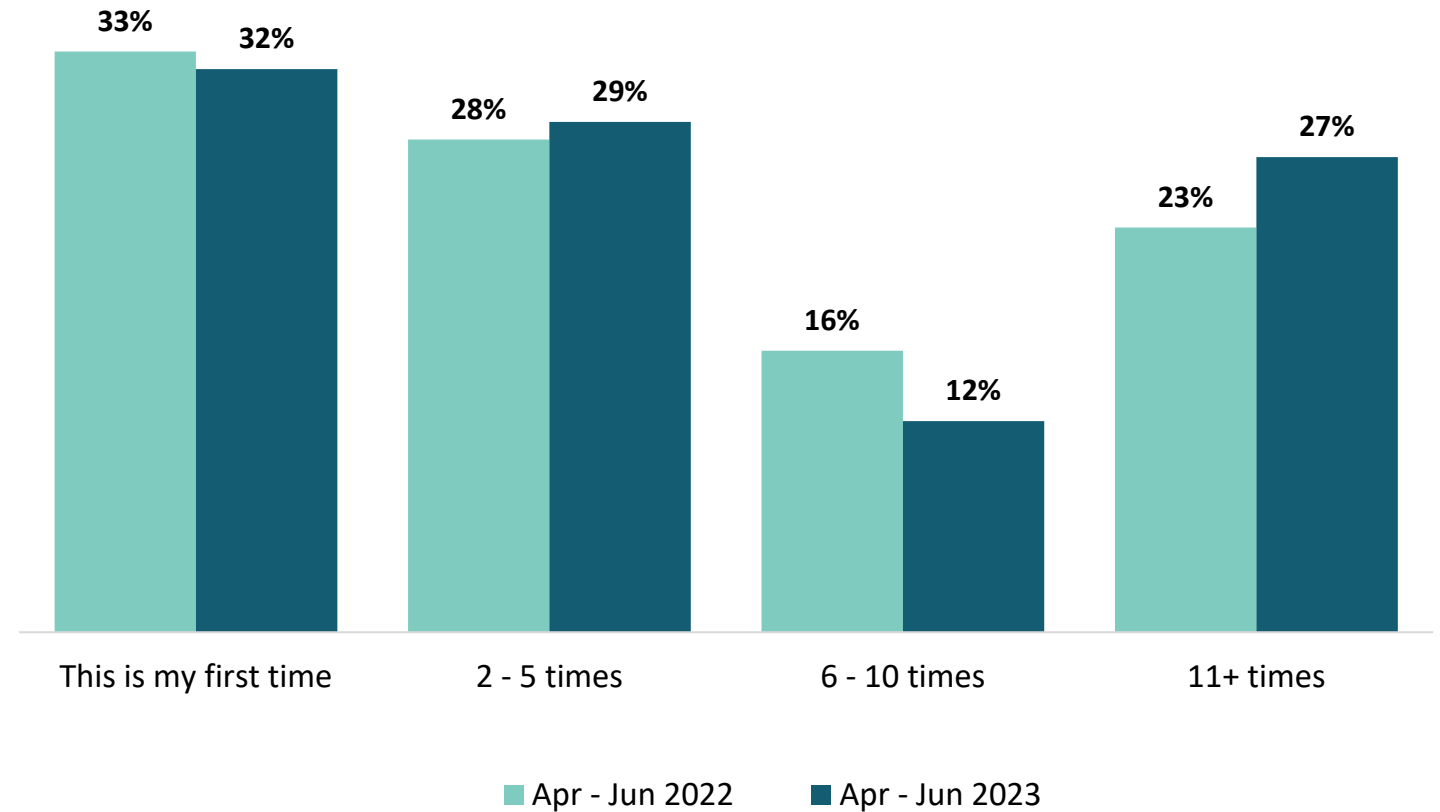
1 in 4 visitors to the Naples, Marco Island, Everglades area brought children with them on their trip



PREVIOUS VISITS

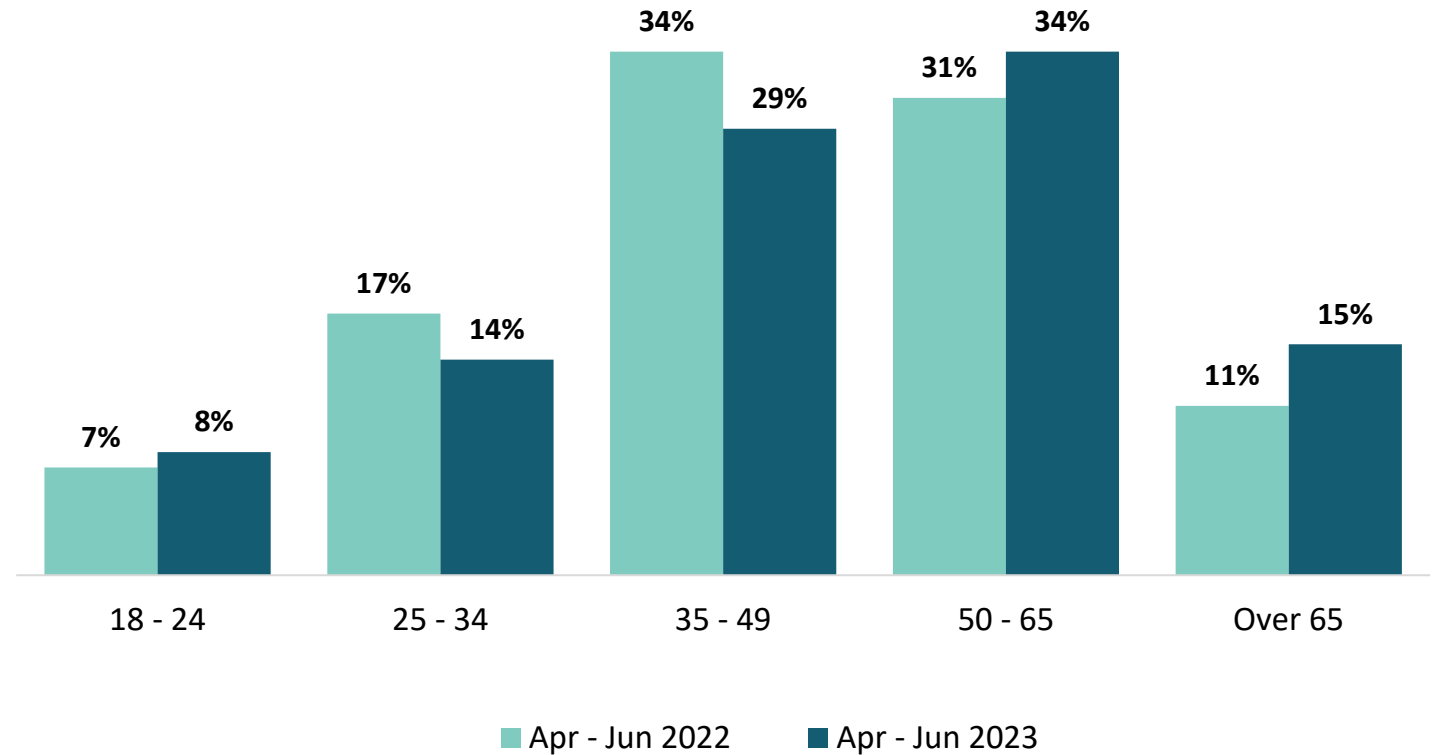


Over 1 in 4 visitors had visited the Naples, Marco Island, Everglades area more than 10 times in the past



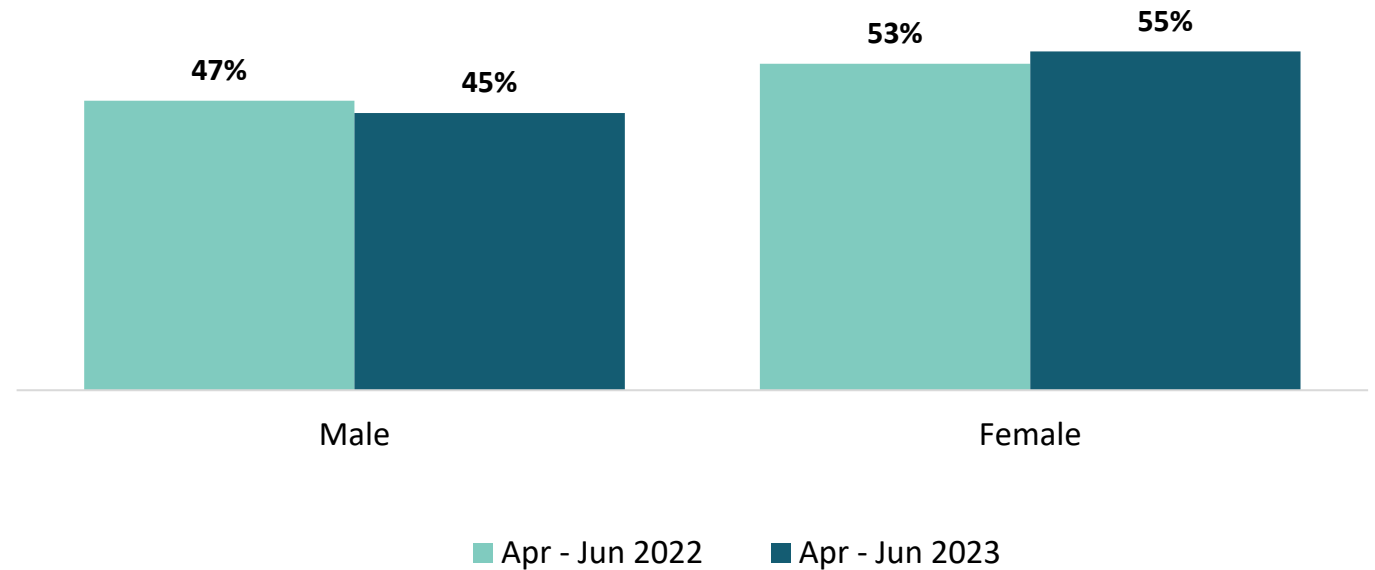


The median visitor to the Naples, Marco Island, Everglades area was 49 years old



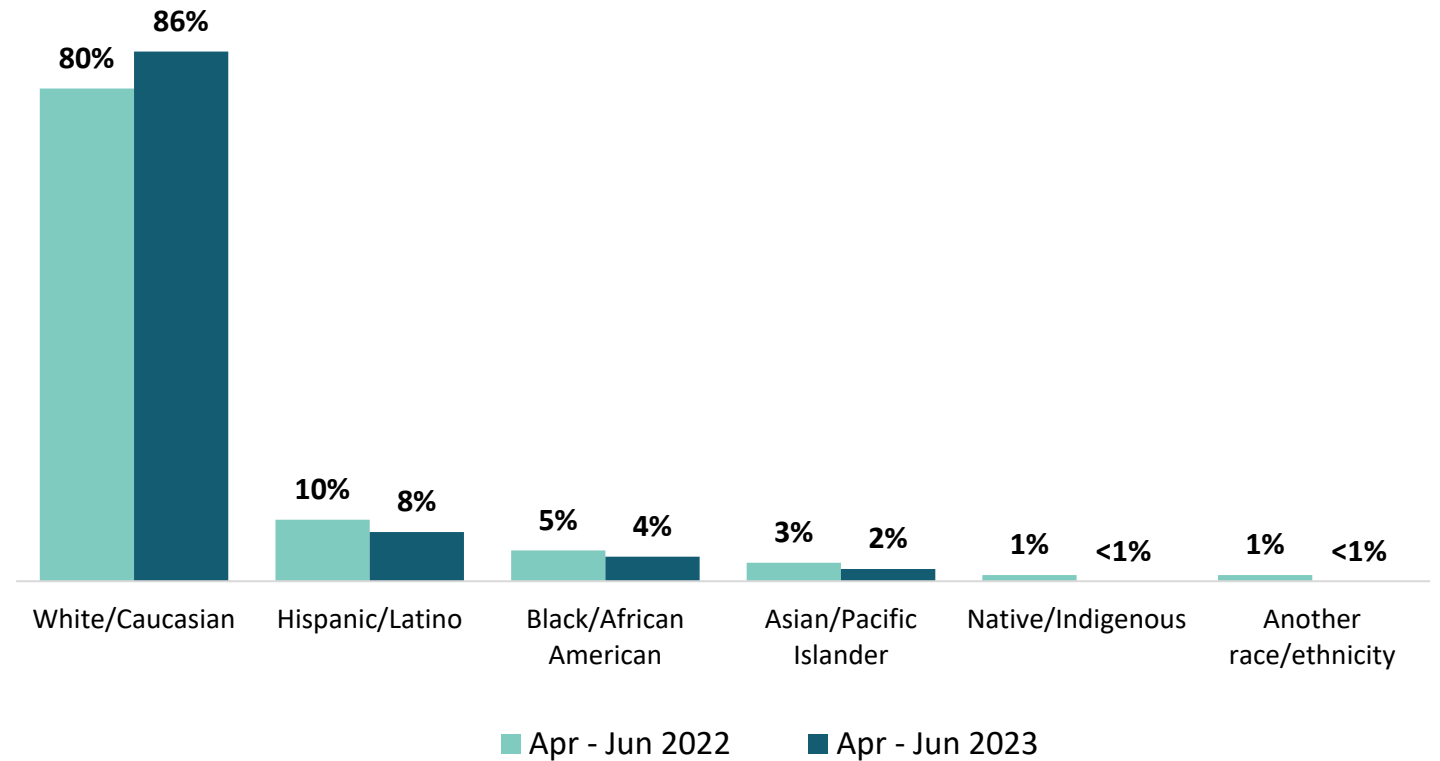


Visitors to the Naples, Marco Island, Everglades area were slightly more likely to be female than they were to be male





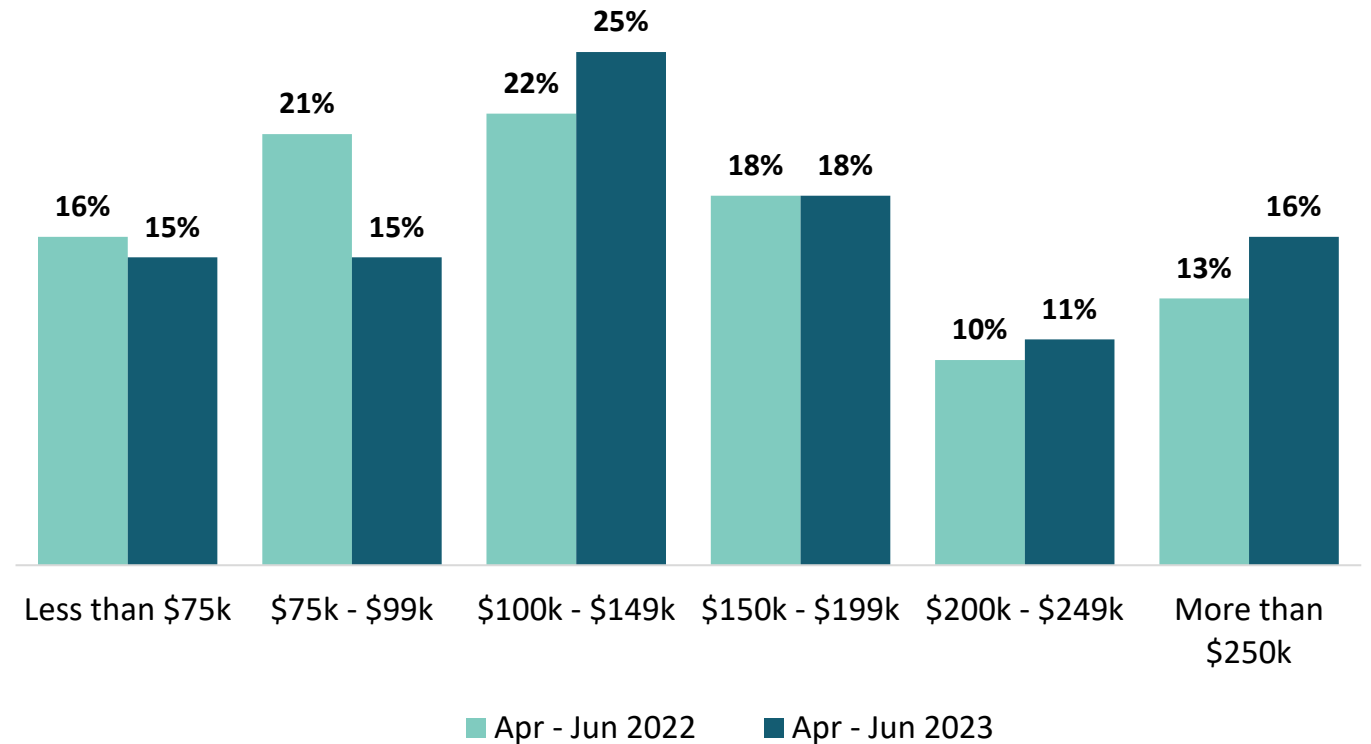
Over 4 in 5 visitors to the Naples, Marco Island, Everglades area were White/Caucasian



HOUSEHOLD INCOME



Typical visitors to the Naples, Marco Island, Everglades area earned \$140,000 in household income per year



VISITOR JOURNEY: TRIP EXPERIENCE



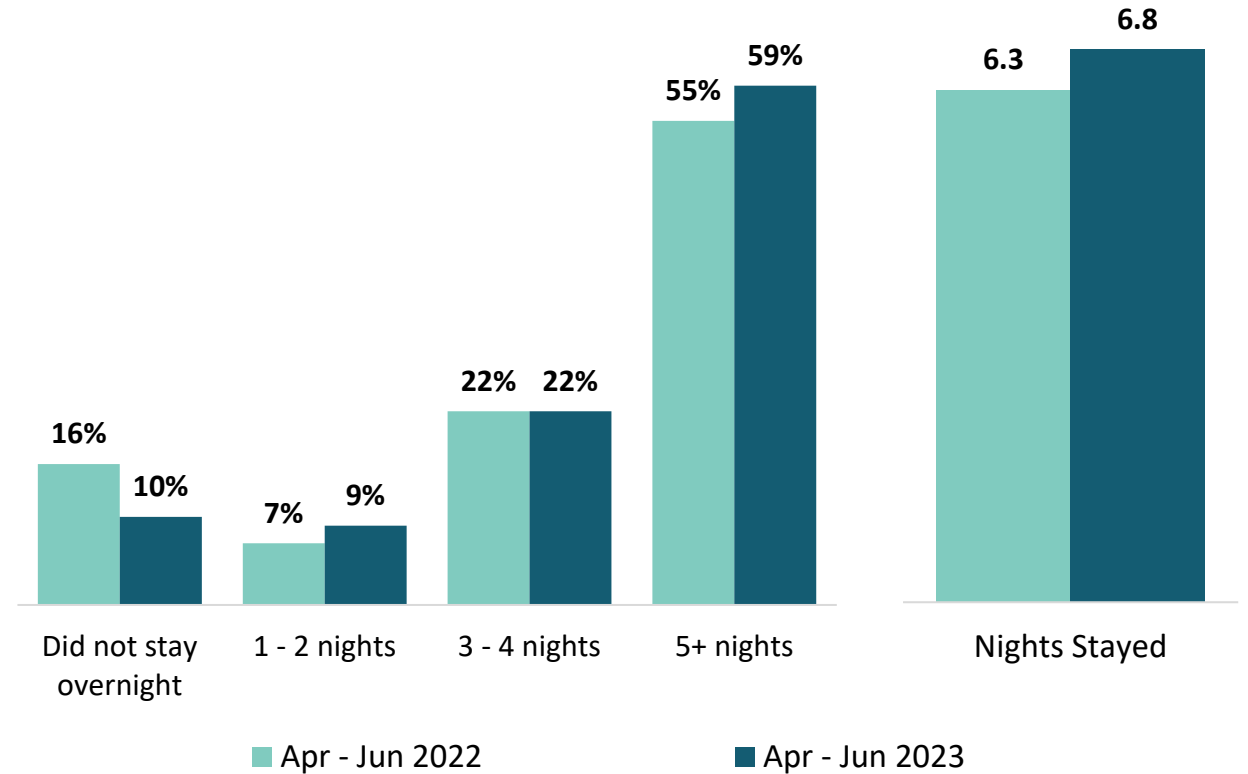
NIGHTS STAYED



Nearly 3 in 5 visitors to the Naples, Marco Island, Everglades area stayed at least five nights



Typical overnight visitors spent 6.8 nights in the Naples, Marco Island, Everglades area



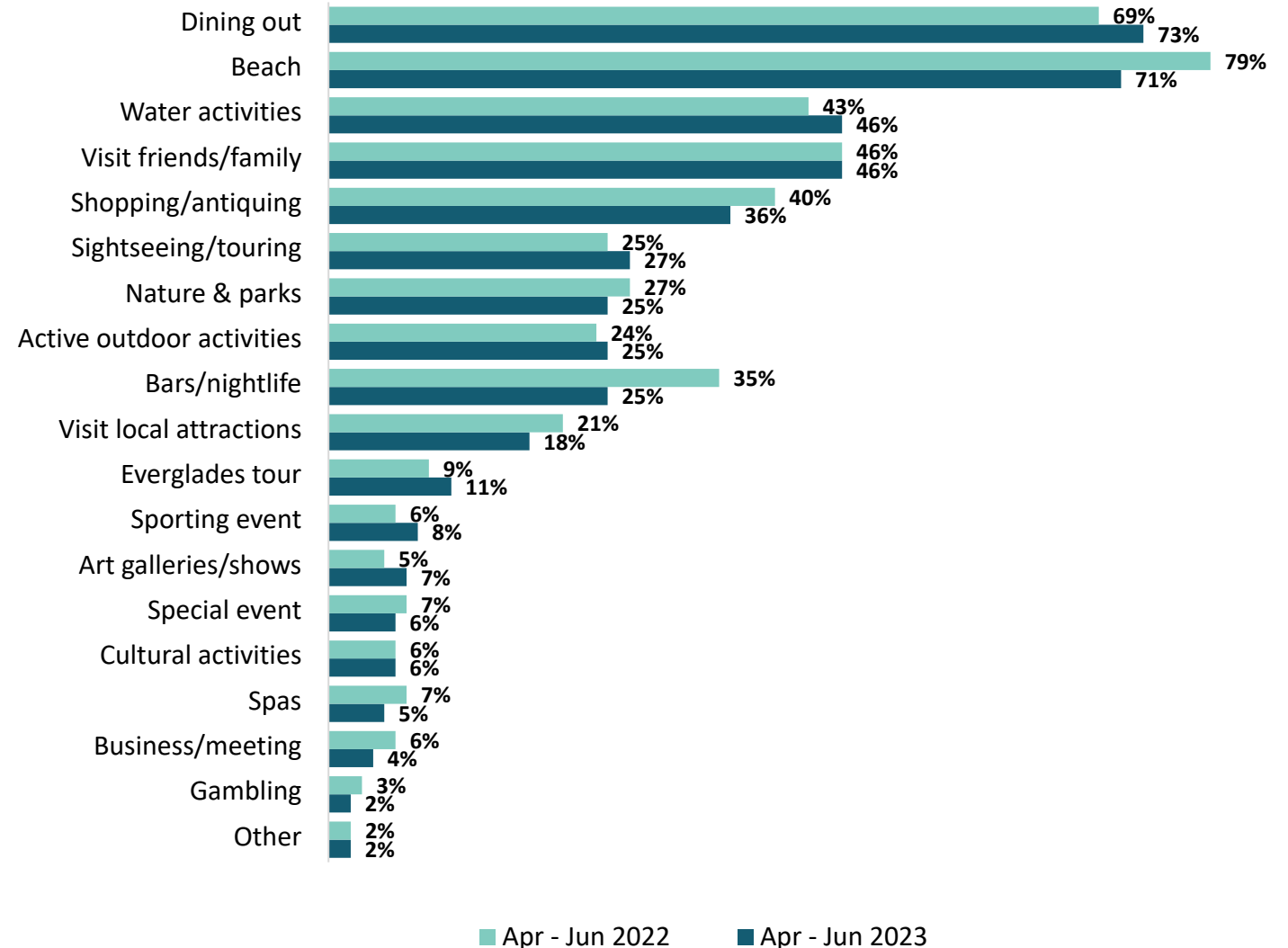
VISITOR ACTIVITIES¹



Nearly 3 in 4 visitors to the Naples, Marco Island, Everglades area went out to eat during their trip



Over 7 in 10 visitors went to the beaches in the Naples, Marco Island, Everglades area during their trip

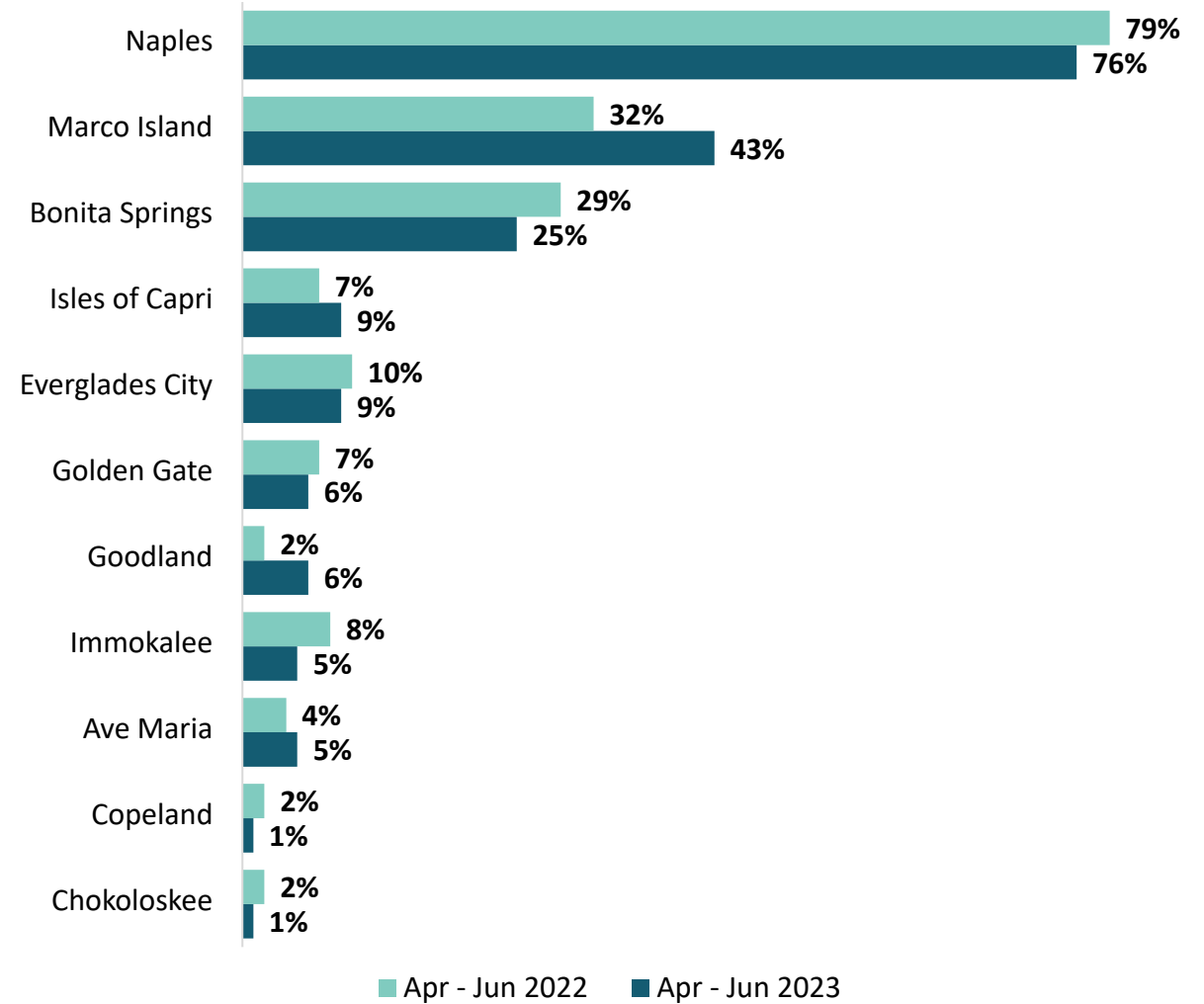


¹Multiple responses permitted.

AREAS VISITED¹



Over 3 in 4 Collier County visitors spent time in the Naples area, while over 2 in 5 spent time in the Marco Island area

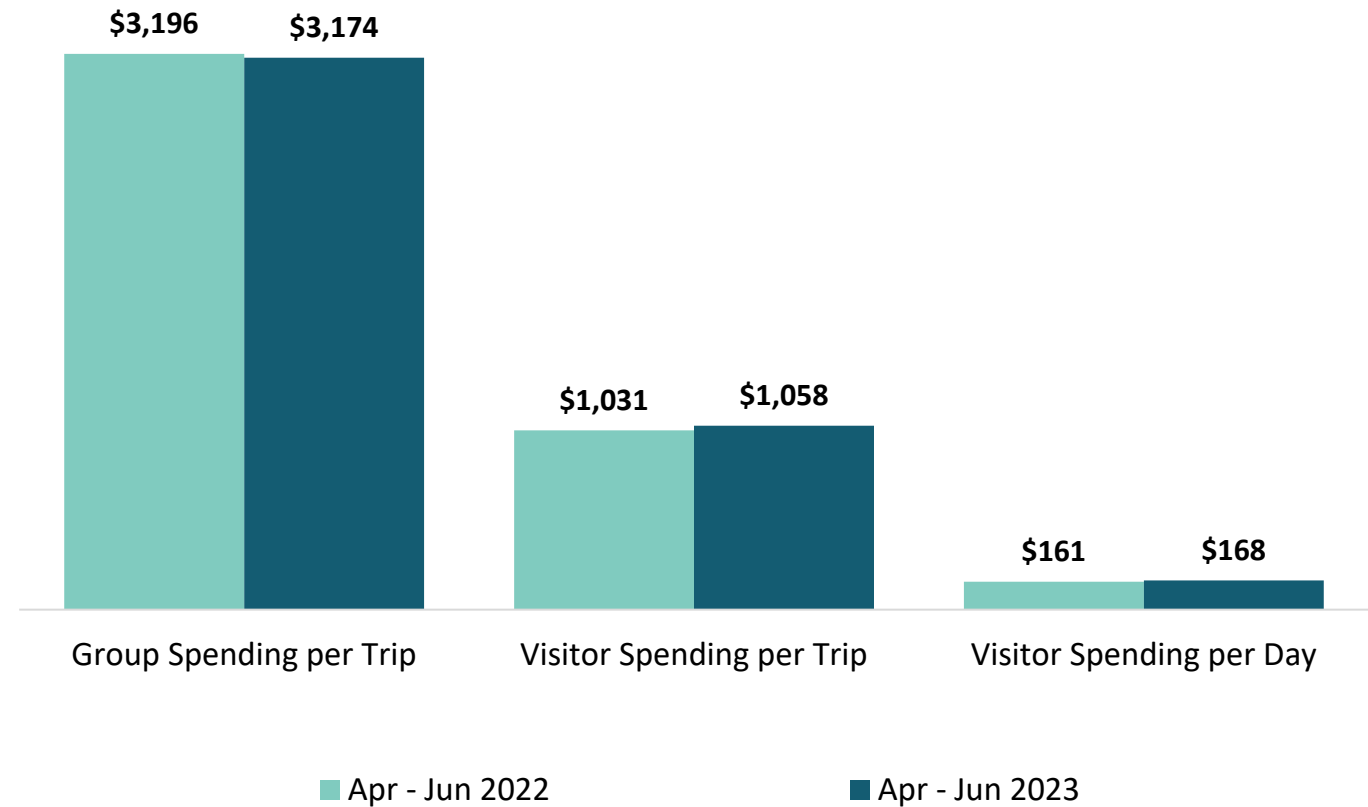


¹Multiple responses permitted.

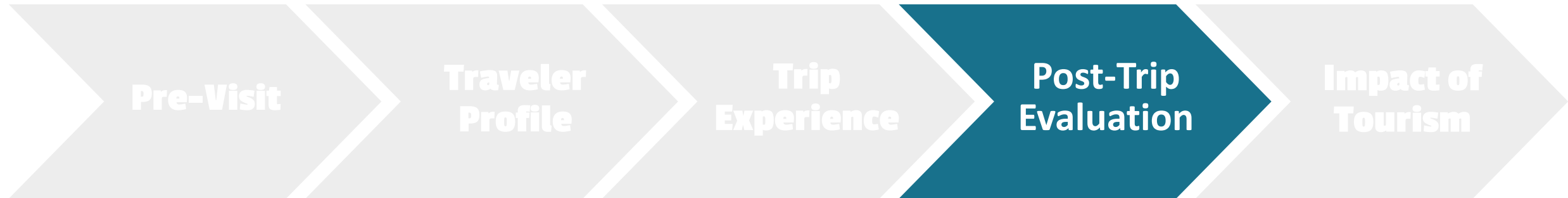
VISITOR SPENDING



Typical travel parties spent \$3,174 per trip with a mean trip length of 6.8 nights



VISITOR JOURNEY: POST-TRIP EVALUATION



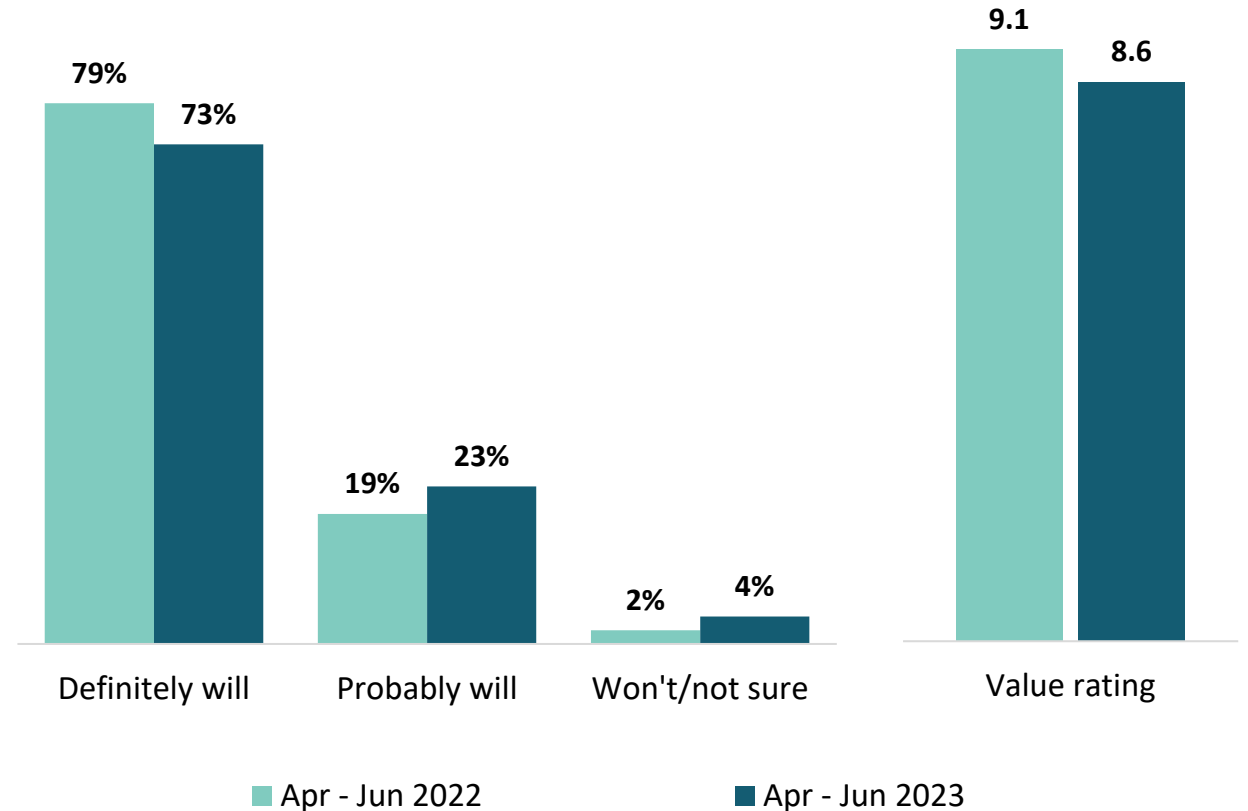
RECOMMENDING AREA



On a 10-point scale¹, visitors rate the value of their travel dollar in the Naples, Marco Island, Everglades area at **8.6**, lower than in Q2 2022



Nearly all visitors said they are likely to recommend the Naples, Marco Island, Everglades area as a place to visit or vacation (Nearly 3 in 4 will definitely recommend)

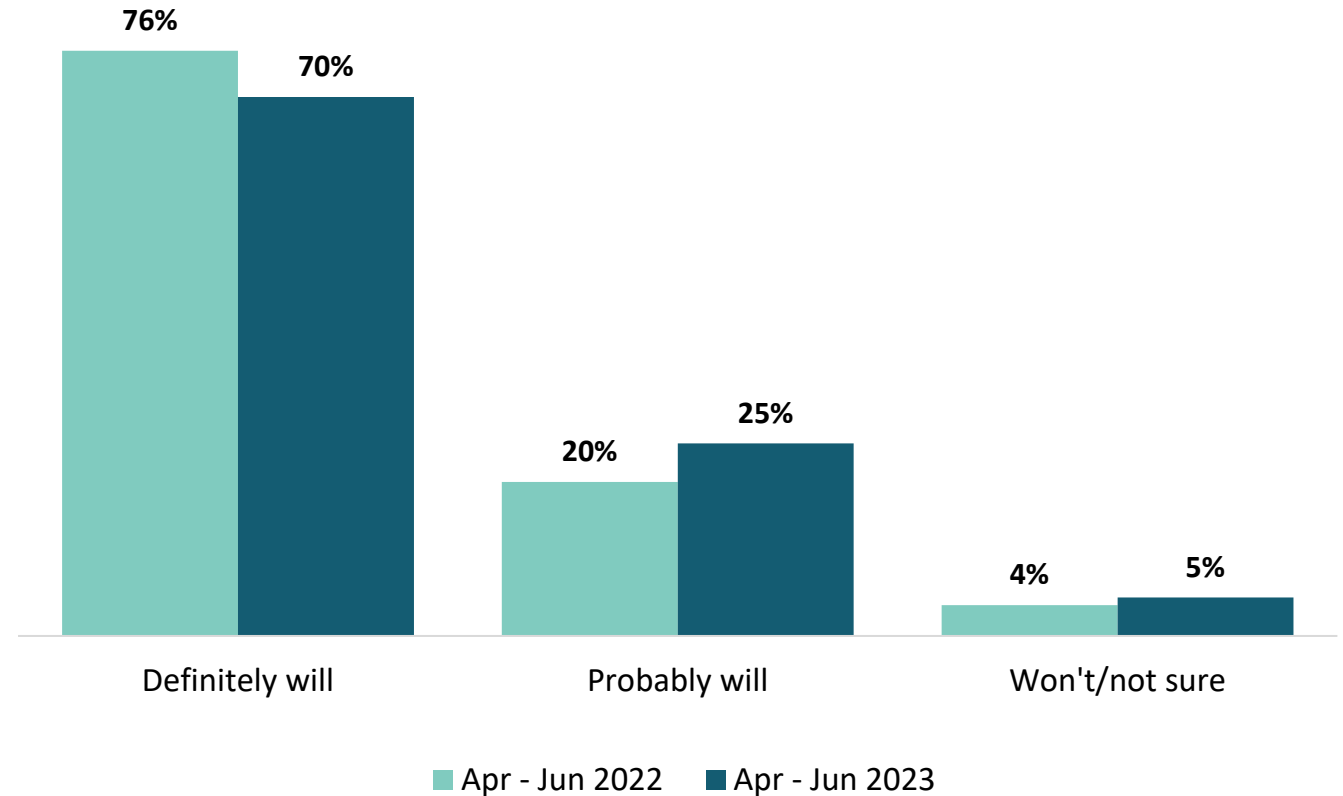


¹ 1 = Poor ; 10 = Excellent

RETURNING TO AREA



Over 9 in 10 visitors said they are likely to return to the Naples, Marco Island, Everglades area for a future visit or vacation (7 in 10 said they will definitely return)



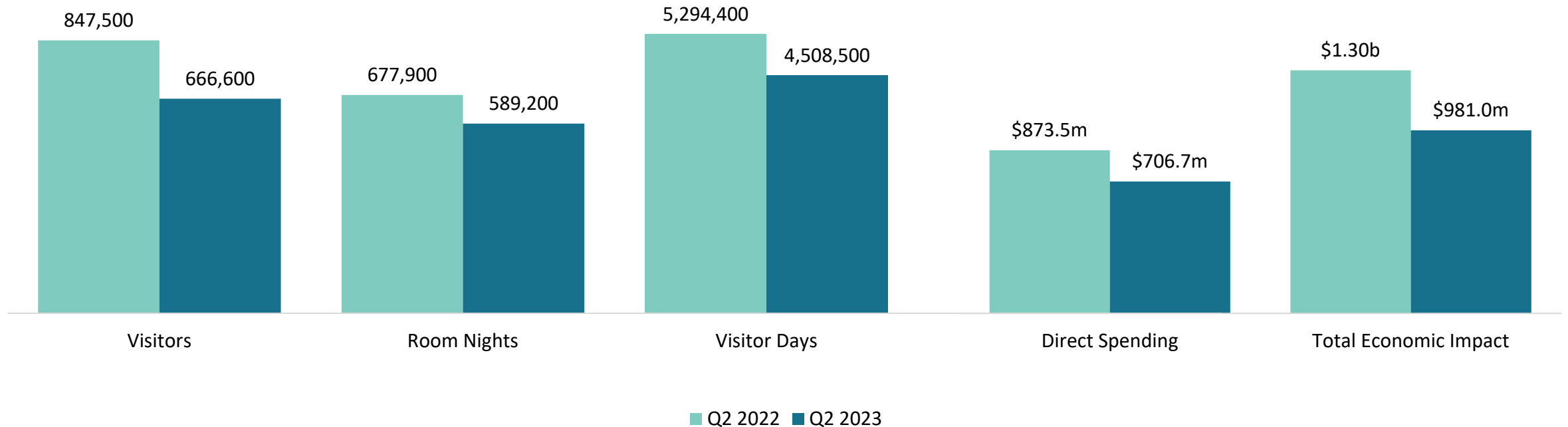
¹ 1 = Poor ; 10 = Excellent



DETAILED FINDINGS

VISITATION & LODGING

	Apr - Jun 2022	Apr - Jun 2023	% Change from 2022
Visitors	847,500	666,600	- 21.3%
Room Nights	677,900	589,200	- 13.1%
Visitor Days	5,294,400	4,508,500	- 14.8%
Direct Spending	\$873,532,300	\$706,742,500	- 19.1%
Economic Impact	\$1,302,436,700	\$980,958,500	- 24.7%
Occupancy Rate	59.7%	55.8%	- 6.5%
Average Daily Rate	\$322.12	\$285.69	- 11.3%
Revenue Per Available Room	\$192.40	\$159.55	- 17.1%



Region of Origin	Apr - Jun 2022	Apr - Jun 2023
Florida	21.2%	26.7%
Southeast	11.9%	11.4%
Northeast	24.1%	19.6%
Midwest	27.9%	25.2%
West	8.7%	7.2%
Canada	2.5%	5.5%
Europe	2.7%	2.1%
UK (England, Scotland, Wales, N. Ireland)	(0.3%)	(0.2%)
Germany	(0.4%)	(0.5%)
Other Europe	(2.0%)	(1.4%)
Central & South America	0.3%	1.2%
Other International	0.7%	1.1%

DETAILED FINDINGS

State of Origin	Apr - Jun 2022	Apr - Jun 2023
Florida	21%	27%
Illinois	5%	6%
New York	5%	6%
Ohio	7%	5%
Massachusetts	3%	3%
Michigan	4%	3%
Indiana	3%	3%
Texas	3%	3%
Pennsylvania	5%	3%
New Jersey	4%	3%
Minnesota	3%	2%
Georgia	2%	2%
Colorado	3%	2%
Connecticut	2%	2%
California	2%	2%
Wisconsin	3%	2%

DETAILED FINDINGS

Market of Origin	Apr - Jun 2022	Apr - Jun 2023
Miami - Ft Lauderdale	4%	8%
New York	8%	7%
Chicago	5%	6%
Ft Myers & Surrounding Areas	3%	5%
Tampa - St Petersburg	4%	4%
Boston	4%	4%
Orlando - Daytona Beach - Melbourne	3%	3%
Philadelphia	2%	2%
Cleveland - Akron	3%	2%
Cincinnati	1%	2%
Indianapolis	1%	2%
Hartford - New Haven	3%	2%
Denver	2%	2%
Minneapolis - St Paul	3%	2%
Detroit	2%	2%
Washington, DC - Hagerstown	3%	2%
Atlanta	1%	2%

Trip Planning Cycle	Apr - Jun 2022	Apr - Jun 2023
A week or less	14%	10%
2 - 4 weeks	16%	17%
1 - 2 months	23%	26%
3 - 4 months	23%	24%
5 - 6 months	14%	11%
7 months - 1 year	7%	9%
More than 1 year	3%	3%

DETAILED FINDINGS

Trip Planning Sources	Apr - Jun 2022	Apr - Jun 2023
Talked to friends	40%	35%
Airline website/app	17%	23%
Search engines	29%	23%
Vacation rental site	18%	17%
Hotel website/app	16%	14%
Trip planning website/app	14%	13%
Social media	12%	11%
ParadiseCoast.com	6%	9%
Visitor guides	9%	9%
Booking website/app	11%	9%
Printed advertisements	1%	3%
Newspapers/magazines	1%	2%
Deal-based promotion	2%	2%
AAA	1%	2%
Collier County CVB	1%	1%
Television advertisements	1%	1%
Other	1%	2%
None	16%	17%

Reasons for Visiting	Apr - Jun 2022	Apr - Jun 2023
Vacation/getaway	61%	65%
Visit friends/family	35%	37%
Special occasion	13%	11%
Sporting event	5%	7%
Business	9%	6%
Golf/tennis trip	3%	5%
Fishing trip	4%	4%
Special event	3%	3%
Cultural activities	1%	1%
Hurricane Recovery	-	1%
Other	1%	1%

Destinations Considered	Apr - Jun 2022	Apr - Jun 2023
No other destinations	68%	65%
Fort Myers – Sanibel	13%	11%
Florida Keys	6%	8%
Sarasota – Bradenton	5%	6%
Miami	5%	6%
Ft. Lauderdale	5%	6%
Clearwater	4%	5%
West Palm Beach	3%	4%
St. Petersburg	5%	4%
Other	5%	6%

Reasons for Choosing Area	Apr - Jun 2022	Apr - Jun 2023
Beaches	46%	42%
Friends/family live here	38%	38%
Quiet/relaxing	27%	27%
Previous experience	28%	22%
Family-friendly destination	21%	21%
Restaurants	16%	20%
Recommendation	17%	18%
Trying something new	12%	13%
Meeting/event hosted here	14%	12%
Quality of accommodations	8%	11%
Not crowded	9%	10%
Shopping	12%	10%
Golf	4%	7%
Wellness	5%	5%
Appealing advertisements	2%	3%
Deal/promotion	3%	2%
Other	3%	2%

Types of Transportation	Apr - Jun 2022	Apr - Jun 2023
Fly	54%	61%
Drive	46%	38%

Airports of Deplanement	Apr - Jun 2022	Apr - Jun 2023
SWFL Intl Airport	71%	74%
Ft. Lauderdale Intl Airport	6%	8%
Miami Intl Airport	7%	6%
Tampa Intl Airport	3%	3%
Punta Gorda Airport	4%	3%
Sarasota/Bradenton Intl Airport	2%	2%
Orlando Intl Airport	3%	1%
Palm Beach Intl Airport	<1%	1%
Naples Airport	1%	<1%
St. Pete - Clearwater Intl Airport	1%	<1%
Other	3%	3%

DETAILED FINDINGS

Pre-Visit Advertising	Apr - Jun 2022	Apr - Jun 2023
Recalled advertising	29%	32%
Influenced by advertising	17%	18%

Advertising Sources ¹	Apr - Jun 2022	Apr - Jun 2023
Social media	52%	50%
Visitor guide	27%	23%
Online article	22%	21%
Cable/satellite TV	12%	16%
Online travel reviews	18%	16%
Brochure	16%	16%
Newspaper/magazine	18%	16%
Website advertisement	17%	16%
YouTube	7%	13%
TV streaming service	5%	12%
Rental agency	9%	11%
Billboard	5%	5%
Radio	8%	5%
Music streaming service	1%	4%
Deal-based promotion	6%	2%
Podcast	<1%	<1%
Other	<1%	<1%

¹Percentages are based on the % of visitors who recalled advertising.

Travel Party Composition	Apr - Jun 2022	Apr - Jun 2023
Solo	19%	16%
As a couple	27%	33%
With family	35%	36%
Other couples/friends	18%	14%
Other	1%	1%

Travel Party Attributes	Apr - Jun 2022	Apr - Jun 2023
Average Travel Party Size	3.0	3.2
Traveled with Children	26%	25%

Previous Visits	Apr - Jun 2022	Apr - Jun 2023
This is my first time	33%	32%
2 - 5 times	28%	29%
6 - 10 times	16%	12%
11+ times	23%	27%

DETAILED FINDINGS

Age	Apr - Jun 2022	Apr - Jun 2023
18 – 24	7%	8%
25 – 34	17%	14%
35 – 49	34%	29%
50 – 65	31%	34%
Over 65	11%	15%
Median Age	46	49

Gender	Apr - Jun 2022	Apr - Jun 2023
Male	47%	45%
Female	53%	55%

DETAILED FINDINGS

Race	Apr - Jun 2022	Apr - Jun 2023
White/Caucasian	80%	86%
Hispanic/Latino	10%	8%
Black/African American	5%	4%
Asian/Pacific Islander	3%	2%
Native/Indigenous	1%	<1%
Another race/ethnicity	1%	<1%

Household Income	Apr - Jun 2022	Apr - Jun 2023
Less than \$75,000	16%	15%
\$75,000 - \$99,999	21%	15%
\$100,000 - \$149,999	22%	25%
\$150,000 - \$199,999	18%	18%
\$200,000 - \$249,999	10%	11%
Over \$250,000	13%	16%
Median Household Income	\$129,500	\$140,000

Nights Stayed	Apr - Jun 2022	Apr - Jun 2023
Did not stay overnight	16%	10%
1 - 2 nights	7%	9%
3 - 4 nights	22%	22%
5+ nights	55%	59%
Average Length of Stay	6.3	6.8

DETAILED FINDINGS

Trip Activities	Apr - Jun 2022	Apr - Jun 2023
Dining out	69%	73%
Beach	79%	71%
Water activities	43%	46%
Visit friends/family	46%	46%
Shopping/antiquing	40%	36%
Sightseeing/touring	25%	27%
Nature & parks	27%	25%
Active outdoor activities	24%	25%
Bars/nightlife	35%	25%
Visit local attractions	21%	18%
Everglades tour	9%	11%
Sporting event	6%	8%
Art galleries/shows	5%	7%
Special event	7%	6%
Cultural activities	6%	6%
Spas	7%	5%
Business/meeting	6%	4%
Gambling	3%	2%
Other	2%	2%

Areas Visited	Apr - Jun 2022	Apr - Jun 2023
Naples	79%	76%
Marco Island	32%	43%
Bonita Springs	29%	25%
Isles of Capri	7%	9%
Everglades City	10%	9%
Golden Gate	7%	6%
Goodland	2%	6%
Immokalee	8%	5%
Ave Maria	4%	5%
Chokoloskee	2%	1%
Copeland	2%	1%

Trip Spending	Apr - Jun 2022	Apr - Jun 2023
Total Travel Party Spending	\$3,196	\$3,174
Visitor Spending per Trip	\$1,031	\$1,058
Visitor Spending per Day	\$161	\$168

Recommending area	Apr - Jun 2022	Apr - Jun 2023
Definitely will recommend	79%	73%
Probably will recommend	19%	22%
Probably will not recommend	1%	3%
Definitely will not recommend	0%	0%
Not sure	1%	1%

Returning to area	Apr - Jun 2022	Apr - Jun 2023
Definitely will return	76%	69%
Probably will return	20%	25%
Probably will not return	2%	3%
Definitely will not return	0%	0%
Not sure	2%	2%

Value rating	Apr - Jun 2022	Apr - Jun 2023
Value of travel dollar	9.1	8.6

NAPLES, MARCO ISLAND, EVERGLADES CVB

April - June 2023 Quarterly Report

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