

# NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau  
April 2022 Monthly Dashboard





While occupancy rates have dipped moderately compared to April 2021, Collier County's average room rates have remained among the highest in Florida, bolstering spending and economic impact



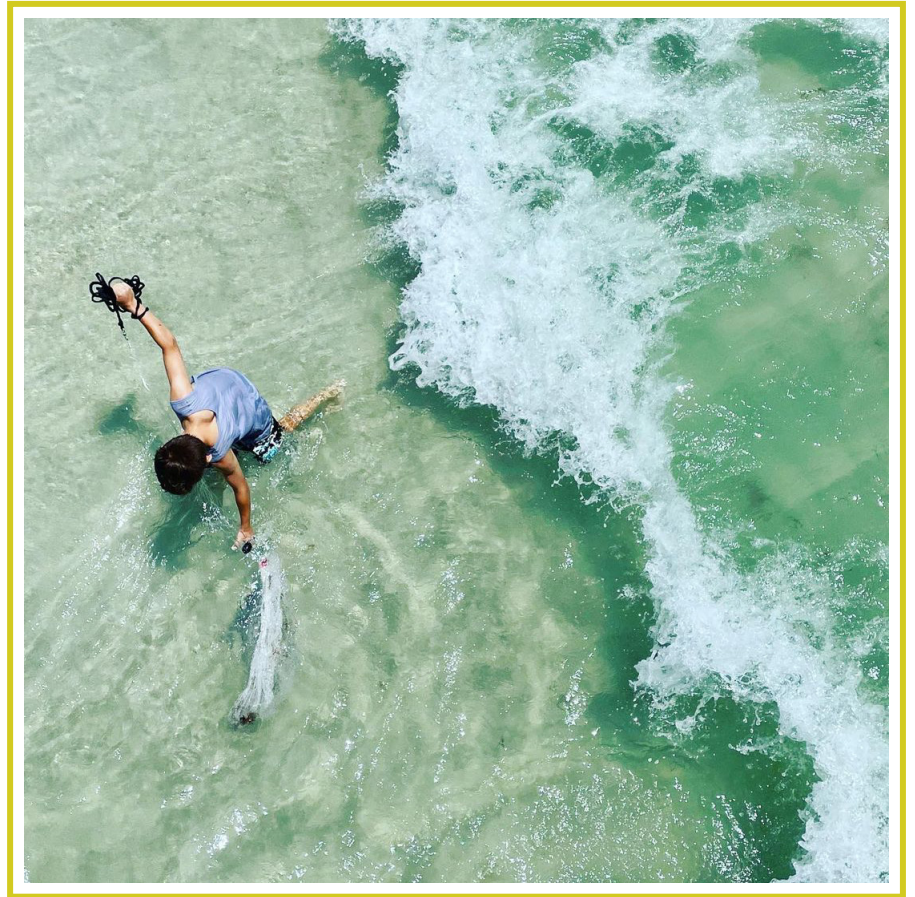
Spending is up 25% over last April due to larger travel parties, longer trip lengths, more inventory available to visitors, and consumers' continued "revenge" vacation spending



Visitors to Collier County are beginning to plan their trips to the area further in advance; typical visitors started planning their visits 81 days ahead of time



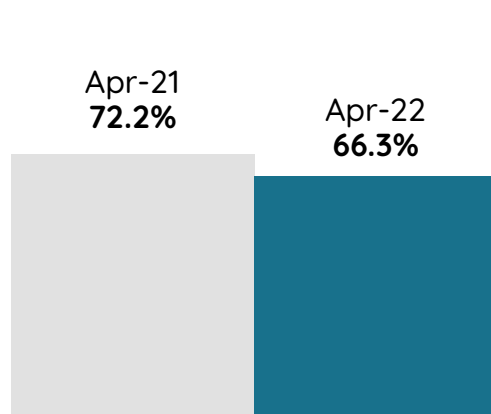
Most visitors perceive the Naples, Marco Island, Everglades area as providing a high-value for their travel dollars; high cost was the primary reason for visitors providing lower ratings



# APRIL 2022 LODGING METRICS\*

## OCCUPANCY RATE

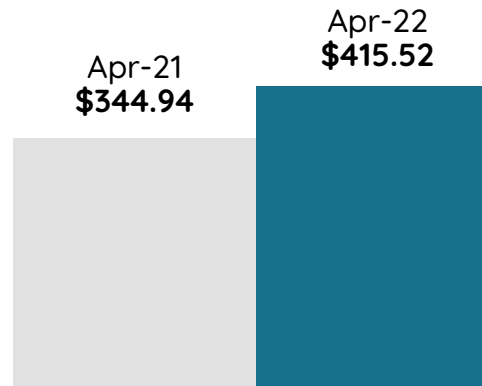
**66.3%**



- 8.2% from 2021

## AVERAGE DAILY RATE

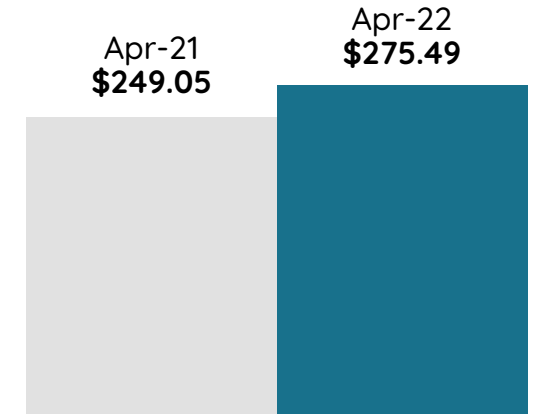
**\$415.52**



+ 20.5% from 2021

## REVENUE PER AVAILABLE ROOM

**\$275.49**



+ 10.6% from 2021

\* Visitors staying in paid accommodations.

# APRIL 2022 VISITATION & ROOM NIGHTS\*

## VISITORS

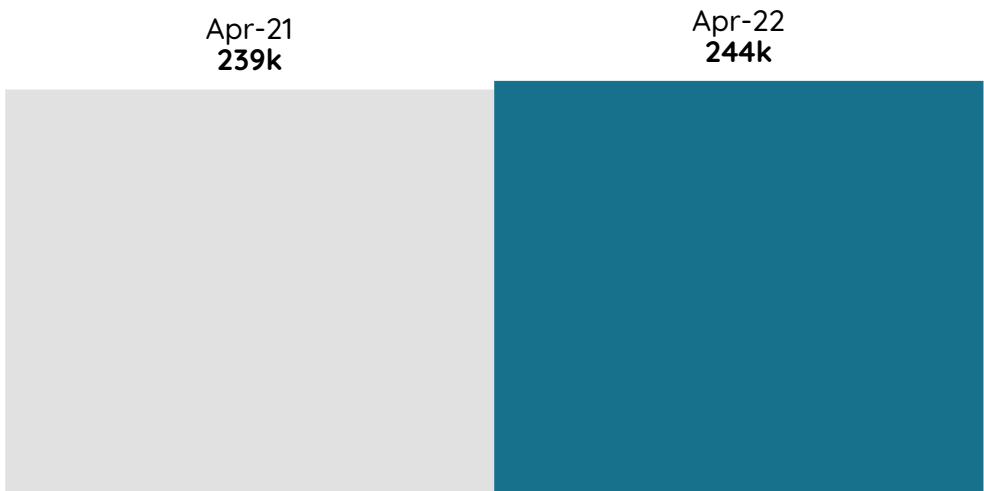
146,600



+ 1.2% from 2021

## ROOM NIGHTS

244,400



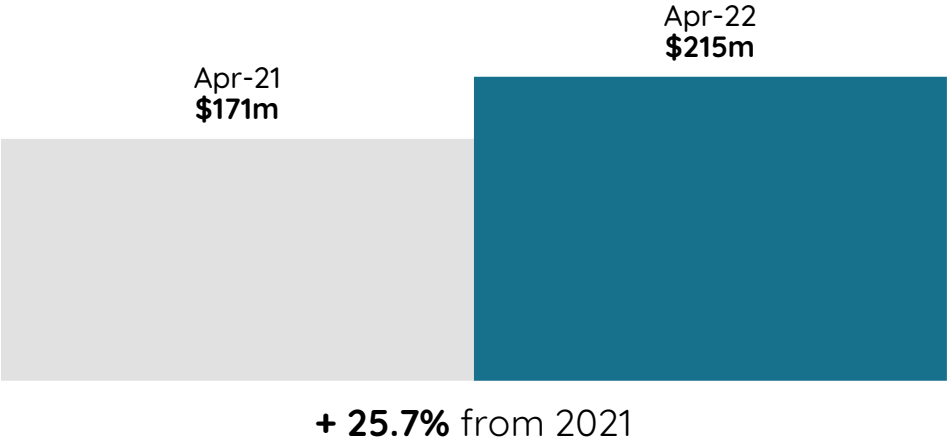
+ 2.1% from 2021

\* Visitors staying in paid accommodations.

# APRIL 2022 SPENDING & ECONOMIC IMPACT\*

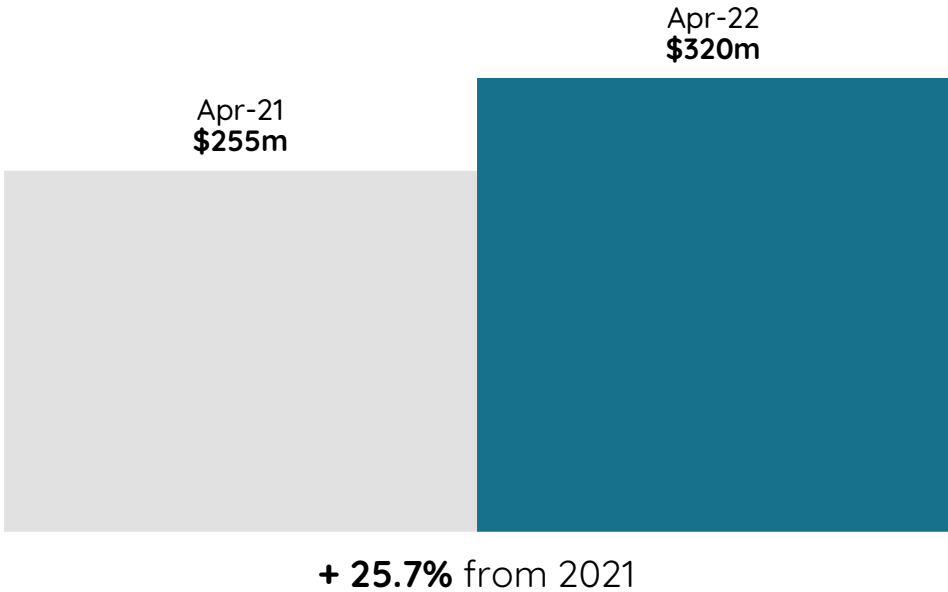
## DIRECT SPENDING

**\$214,644,300**



## ECONOMIC IMPACT

**\$320,034,700**



\* Visitors staying in paid accommodations.

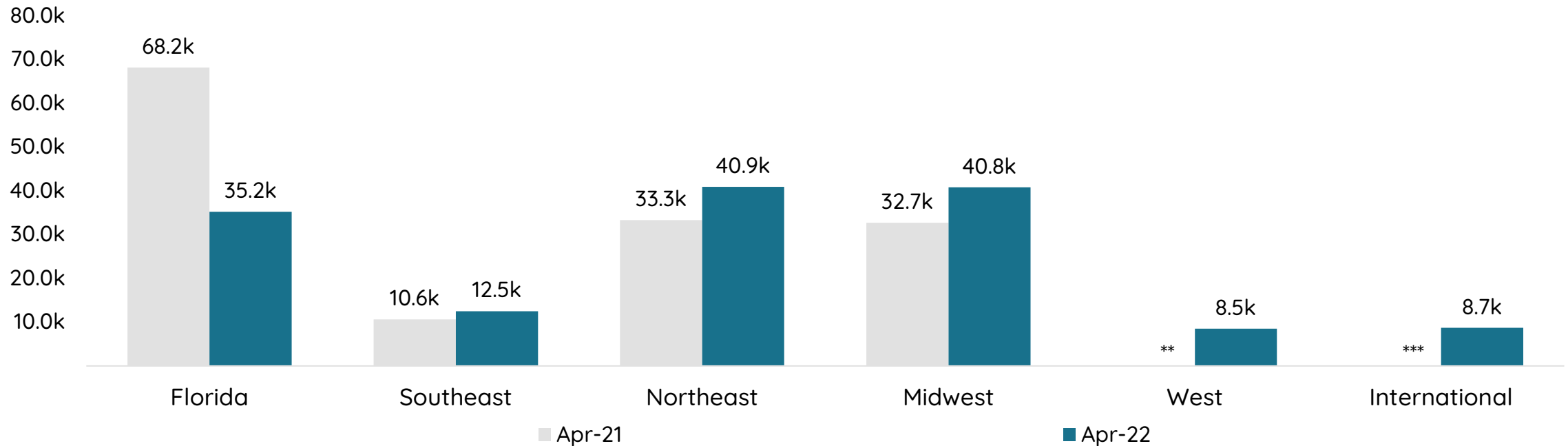
# VISITOR ORIGIN\*

## FLORIDA VISITORS

**35,200**

## OUT-OF-STATE VISITORS

**111,400**



\* Visitors staying in paid accommodations.

\*\* Visitation from western U.S. states not separated from "other" category in April 2021.

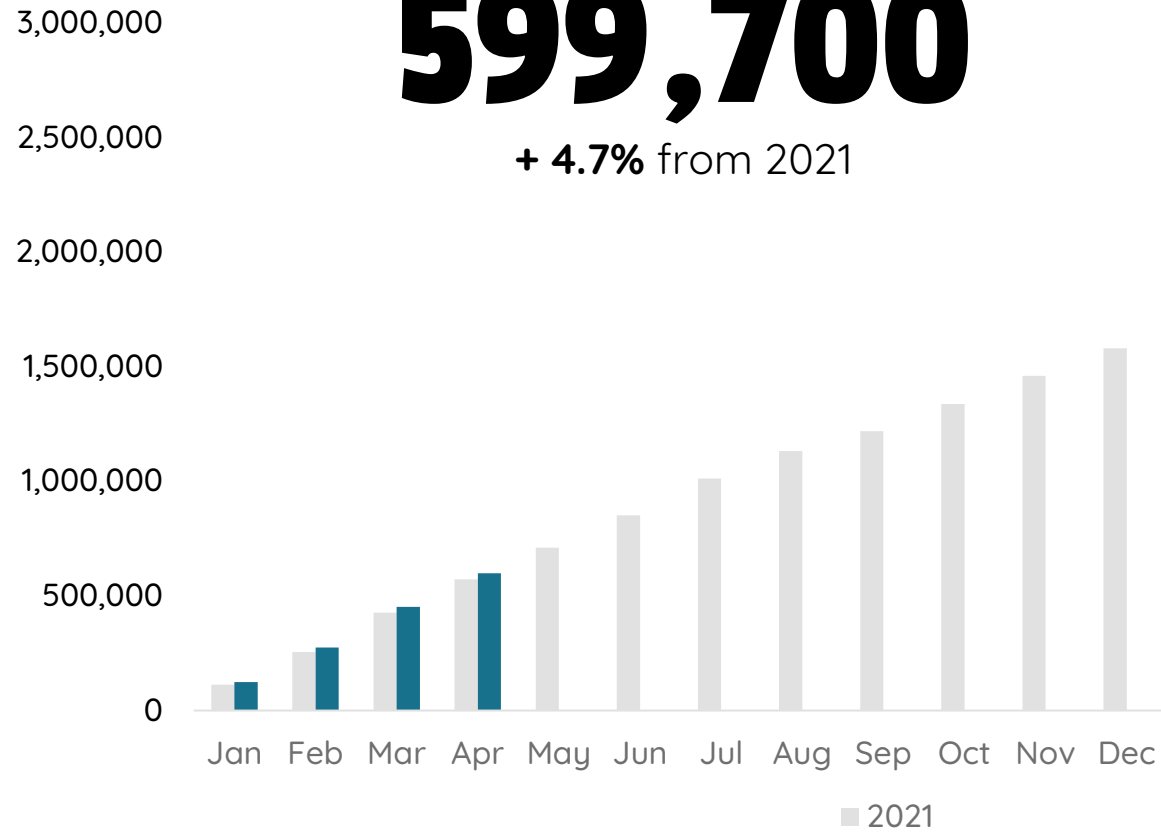
\*\*\* Visitation from international markets was too small to estimate for most of 2020 and 2021.

# CUMULATIVE VISITATION & ROOM NIGHTS\*

## CYTD VISITORS

**599,700**

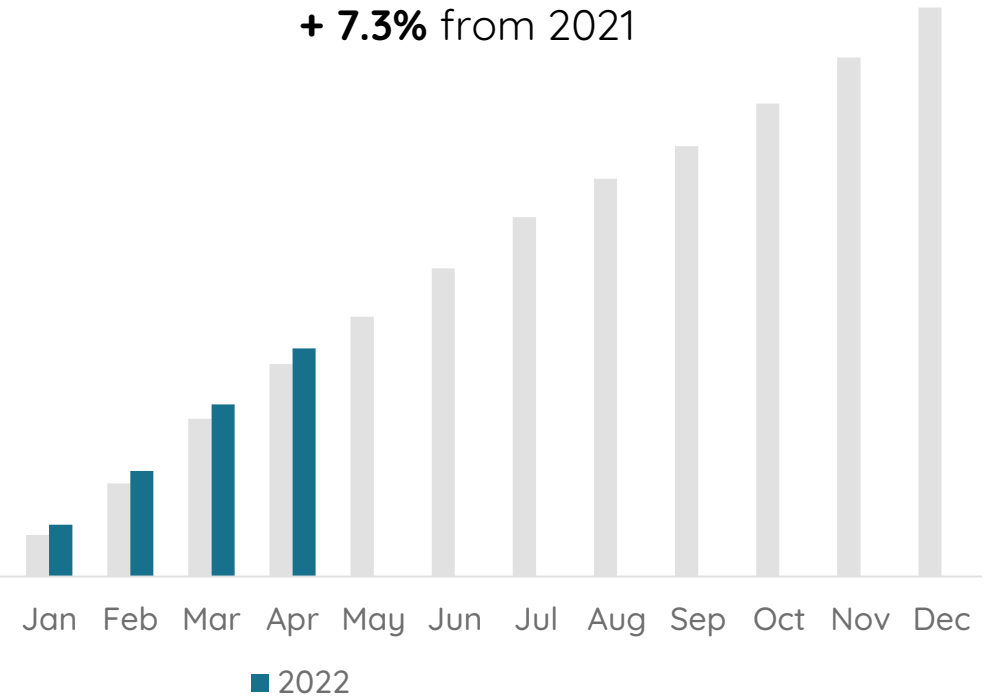
+ 4.7% from 2021



## CYTD ROOM NIGHTS

**995,000**

+ 7.3% from 2021



\* Visitors staying in paid accommodations.

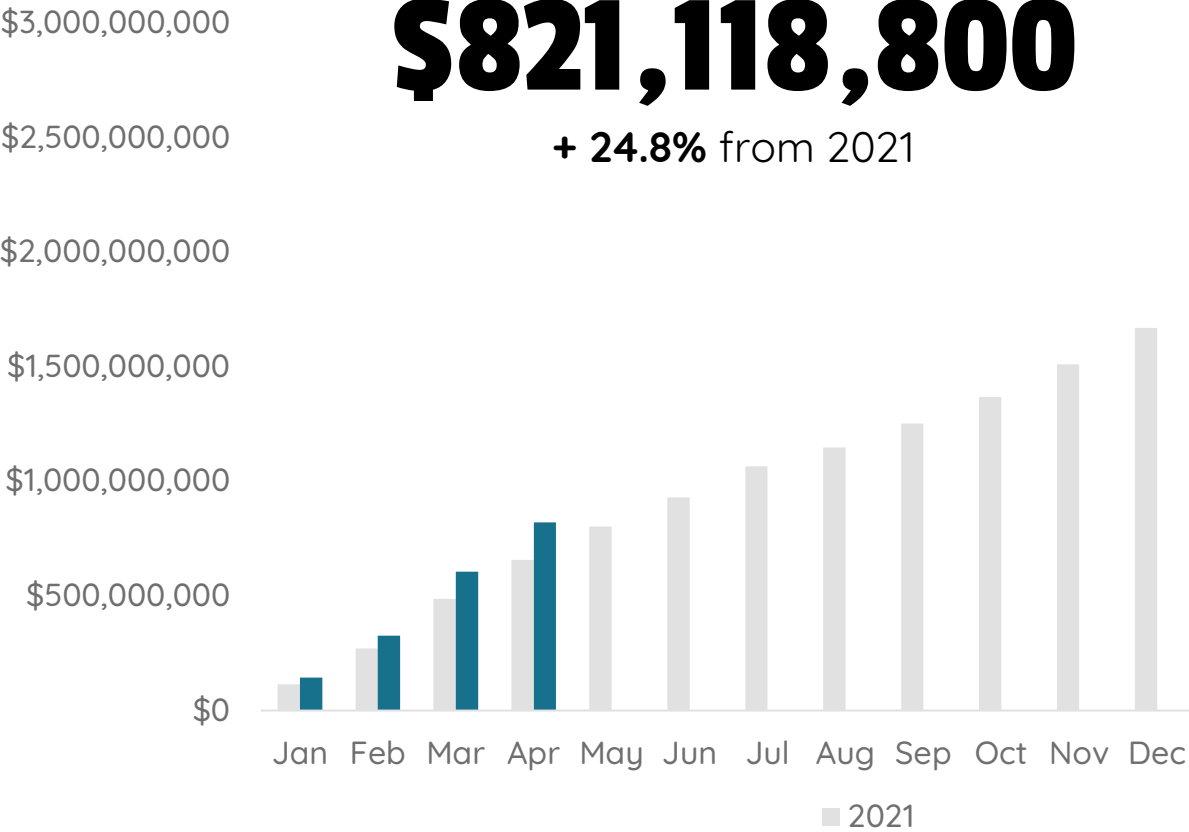


# CUMULATIVE SPENDING & ECONOMIC IMPACT\*

## CYTD DIRECT SPENDING

**\$821,118,800**

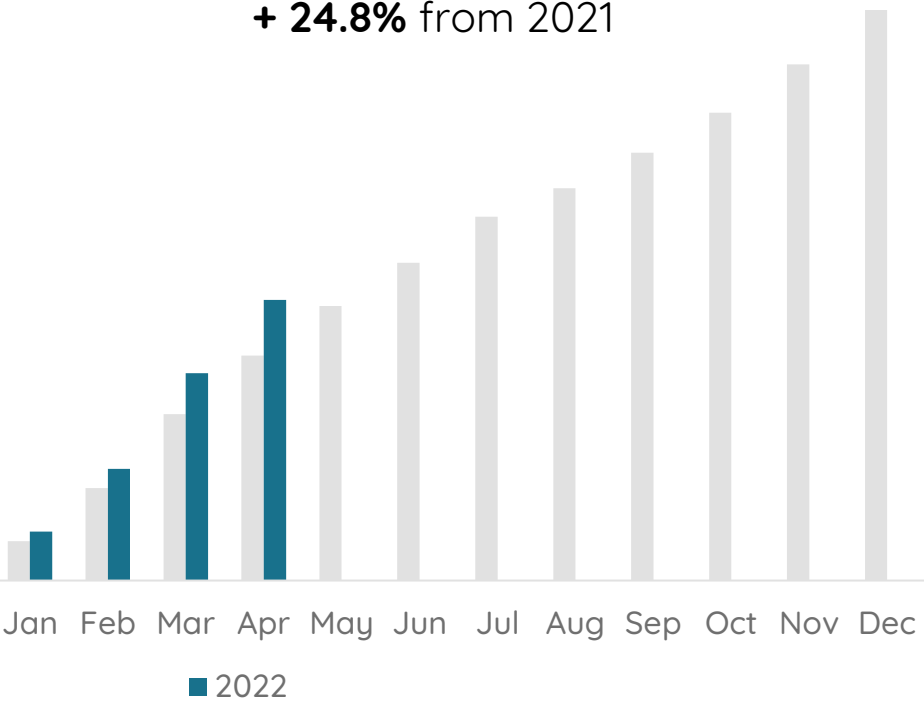
+ 24.8% from 2021



## CYTD ECONOMIC IMPACT

**\$1,224,288,200**

+ 24.8% from 2021

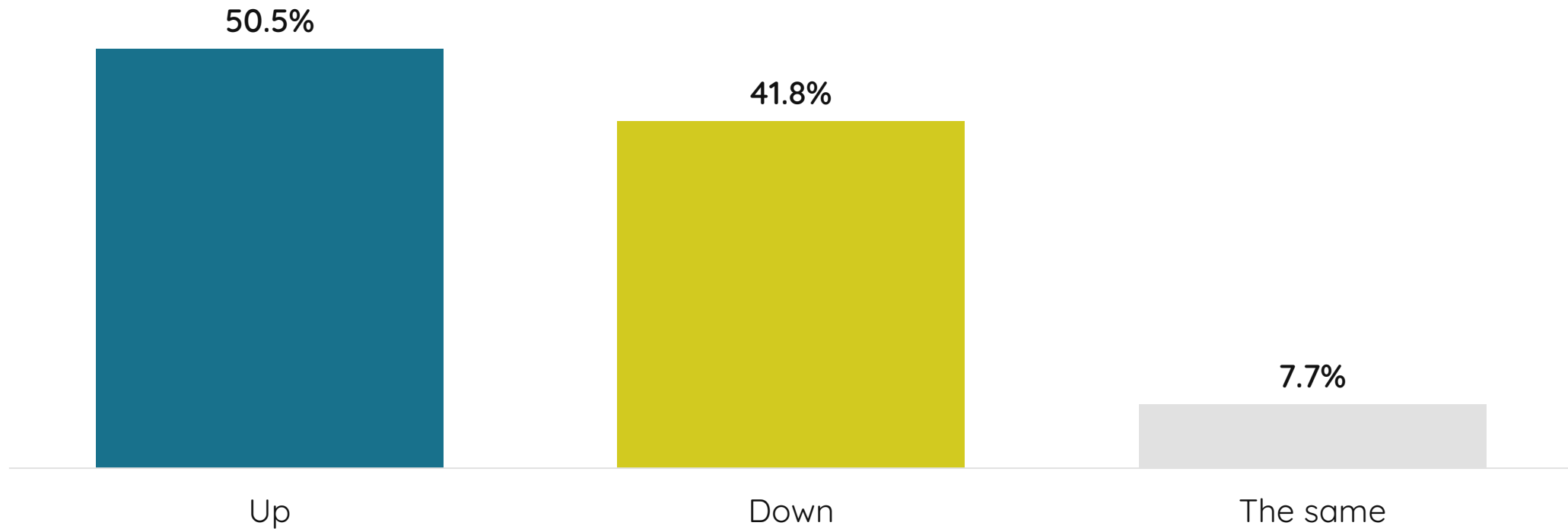


\* Visitors staying in paid accommodations.



# OCCUPANCY BAROMETER

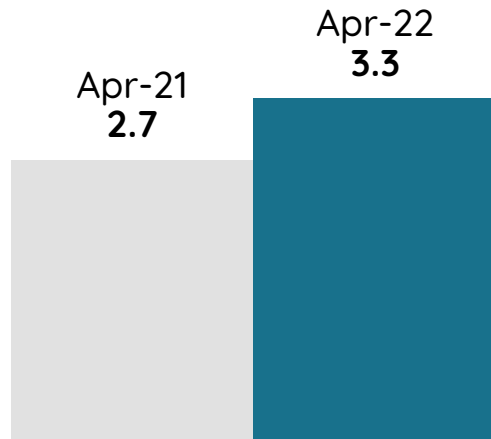
Looking ahead to the next three months, are your property's reservations up, down, or the same compared to this time last year?



# TRIP CHARACTERISTICS\*

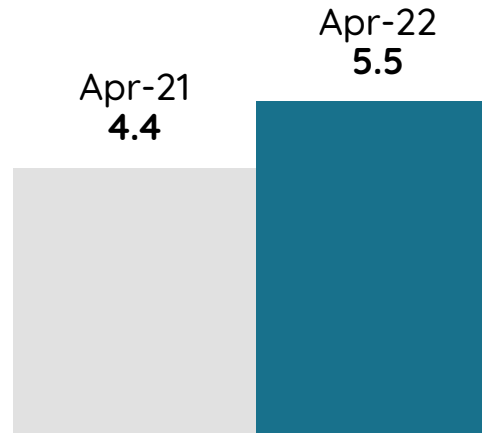
## TRAVEL PARTY SIZE

**3.3**



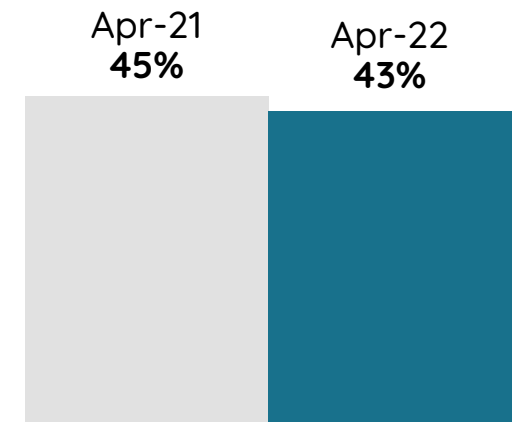
## NIGHTS STAYED

**5.5**



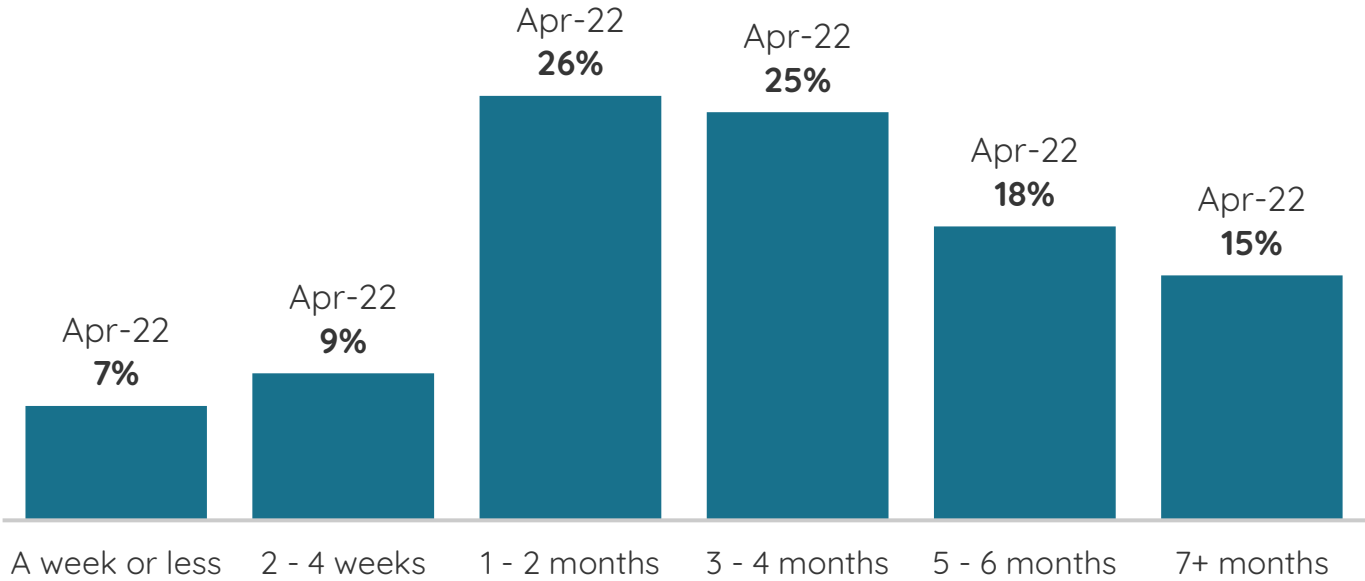
## 1ST TIME VISITORS

**43%**

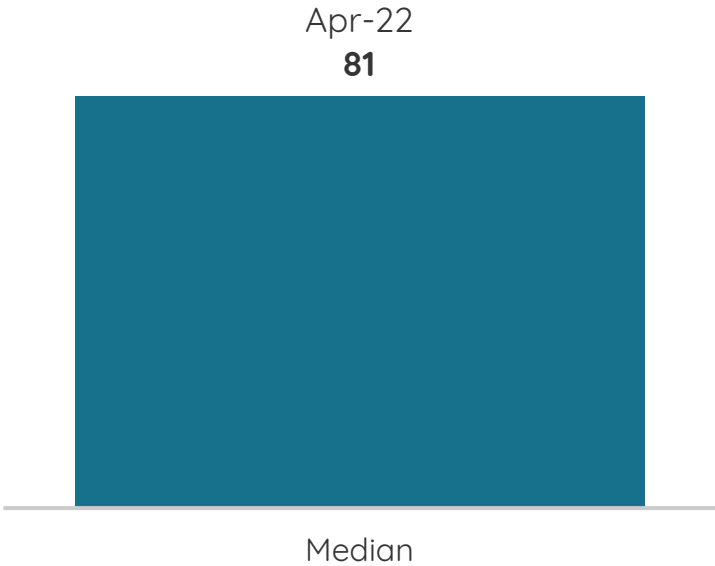


\* Visitors staying in paid accommodations.

## PLANNING WINDOWS

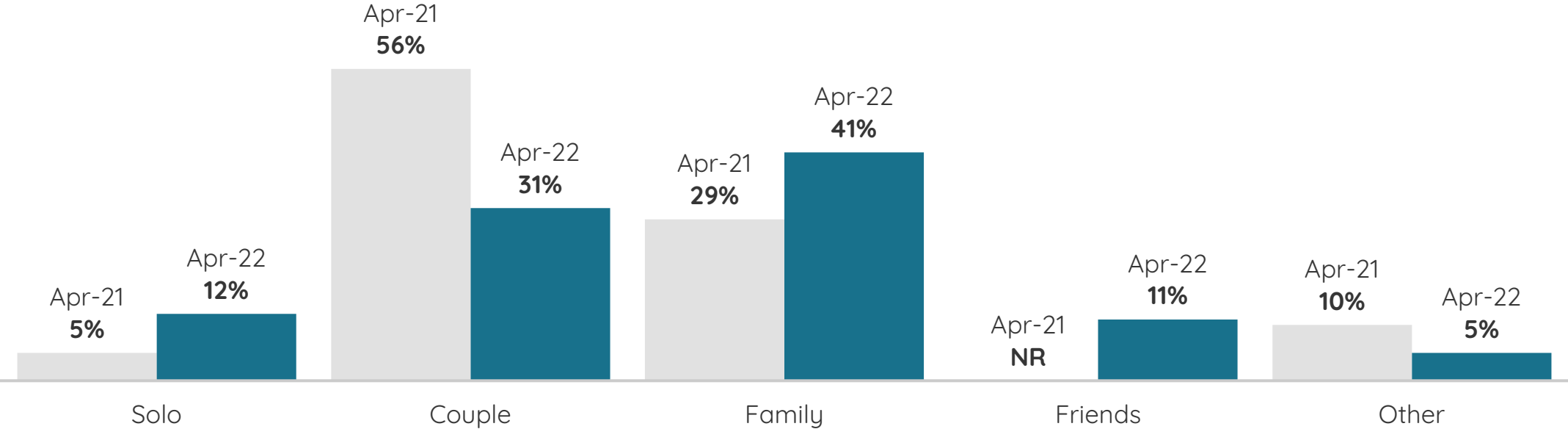


## MEDIAN PLANNING DAYS



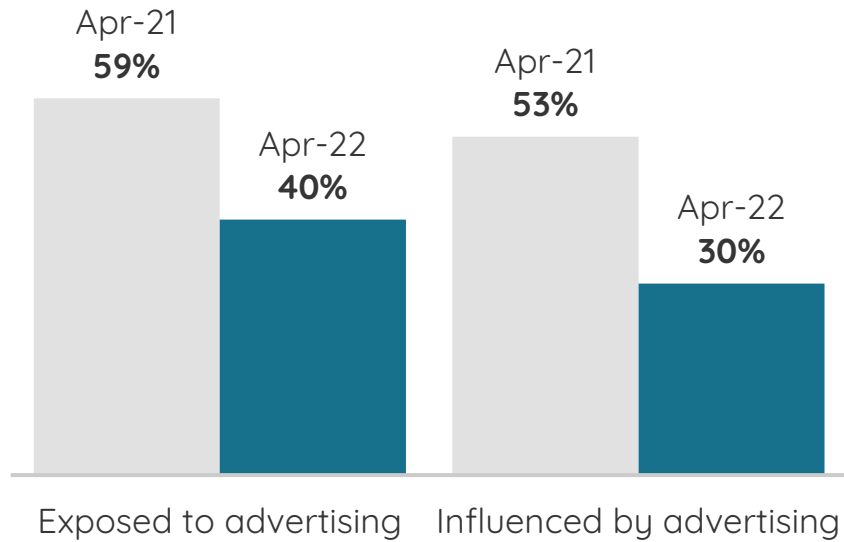
\* Visitors staying in paid accommodations.

## TRAVEL PARTY COMPOSITION

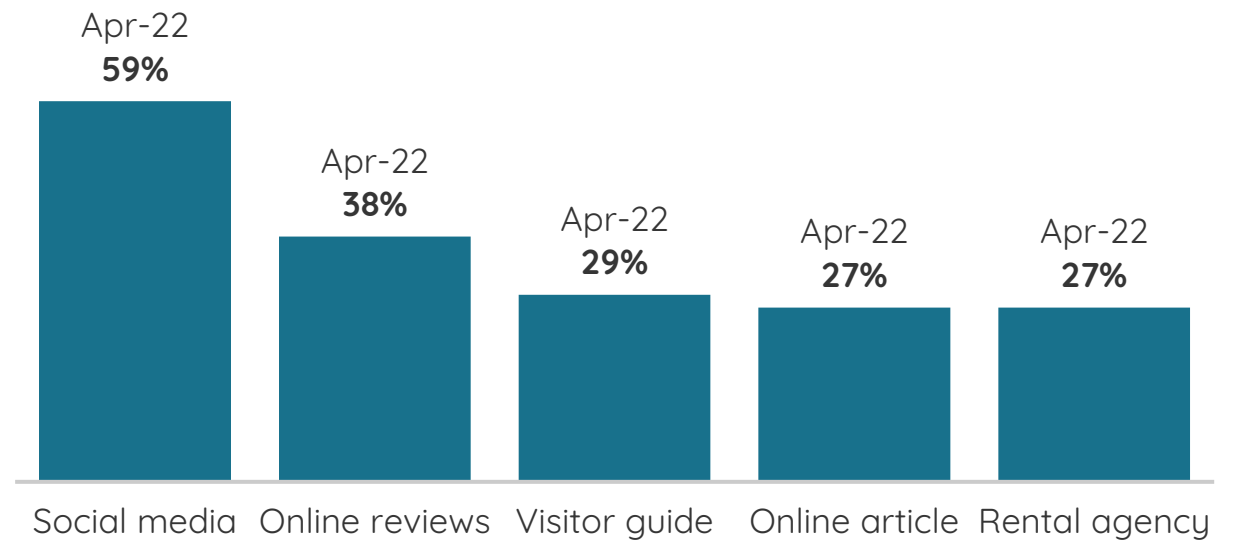


\* Visitors staying in paid accommodations.

## REACH & INFLUENCE



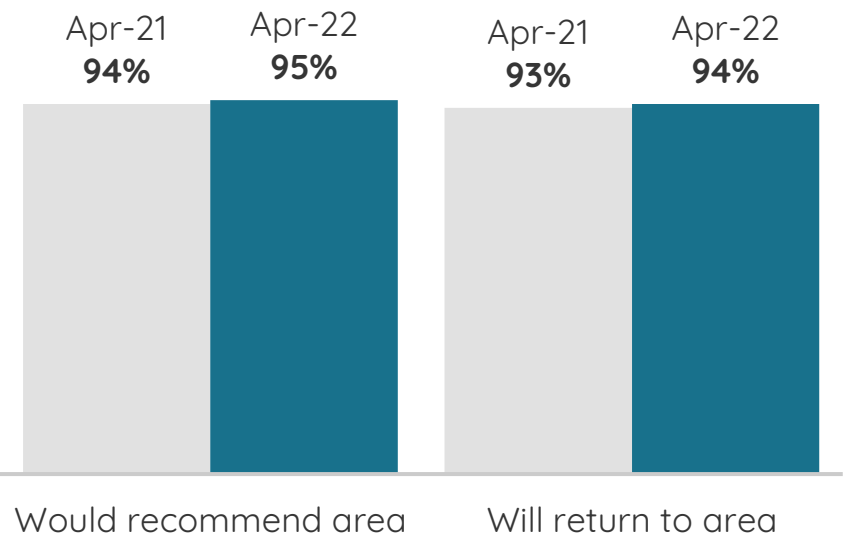
## RECALLED SOURCES\*\*



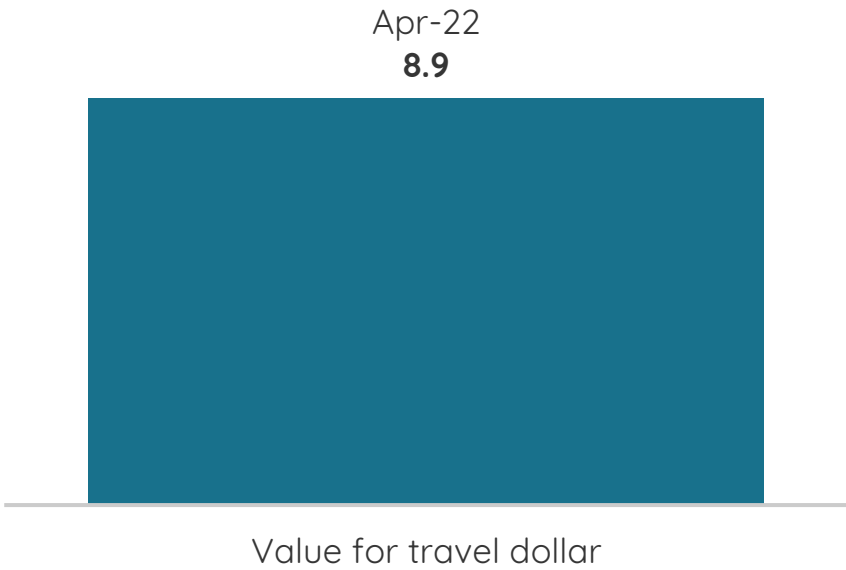
\* Visitors staying in paid accommodations.

\*\* Base of visitors exposed to advertising. Multiple responses permitted.

## SATISFACTION WITH DESTINATION



## VALUE FOR TRAVEL DOLLAR\*\*



\* Visitors staying in paid accommodations.  
\*\* 10-point scale where 10 is “excellent” and 1 is “poor”. High cost was the primary reason for visitors providing lower ratings.

# APRIL 2022 METRICS



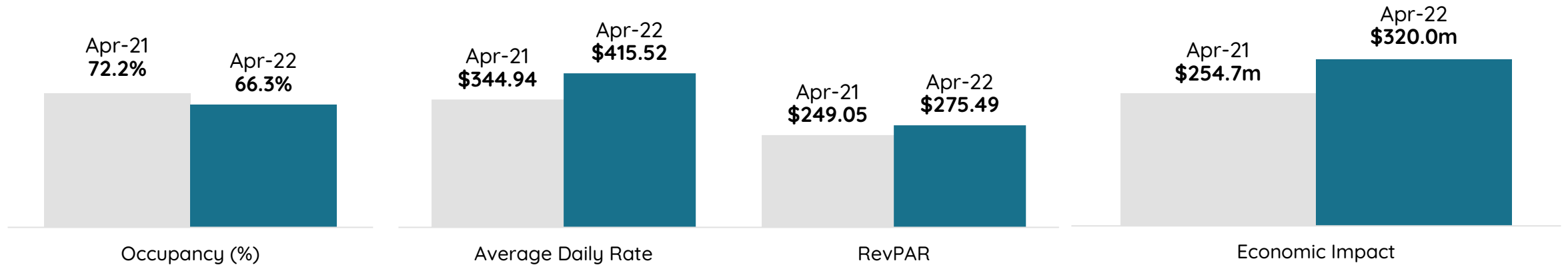


# APRIL 2022 OVERNIGHT VISITATION & LODGING\*

	April 2021	April 2022	% Change from 2021
Occupancy Rate	72.2%	66.3%	- 8.2%
Average Daily Rate	\$344.94	\$415.52	+ 20.5%
RevPAR	\$249.05	\$275.49	+ 10.6%

	April 2021	April 2022	% Change from 2021
Visitors	144,800	146,600	+ 1.2%
Room Nights	239,300	244,400	+ 2.1%
Direct Spending	\$170,819,700	\$214,644,300	+ 25.7%
Economic Impact	\$254,692,200	\$320,034,700	+ 25.7%



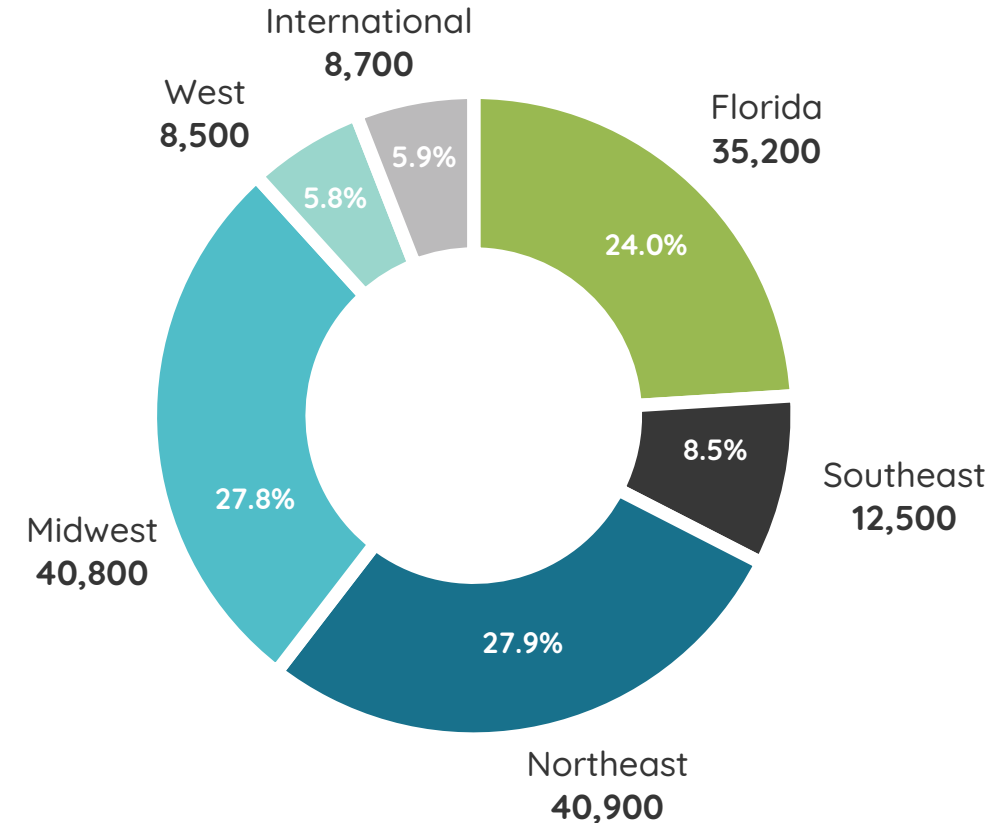
\* Visitors staying in paid accommodations.

# APRIL 2022 OVERNIGHT VISITOR ORIGIN MARKETS\*

Region	April 2021		April 2022		Percent Change (Δ%)	
	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	68,200	47.2%	35,200	24.0%	- 48.4%	- 49.2%
Southeast	10,600	7.3%	12,500	8.5%	+ 17.9%	+ 16.4%
Northeast	33,300	23.0%	40,900	27.9%	+ 22.8%	+ 21.3%
Midwest	32,700	22.6%	40,800	27.8%	+ 24.8%	+ 23.0%
West <sup>1</sup>	0	0.0%	8,500	5.8%	-	-
Canada <sup>2</sup>	0	0.0%	2,100	1.4%	-	-
Europe <sup>2</sup>	0	0.0%	4,500	3.1%	-	-
C/S America <sup>2</sup>	0	0.0%	100	0.1%	-	-
Other	0	0.0%	2,000	1.4%	-	-
<b>Total</b>	<b>144,800</b>	<b>100.0%</b>	<b>146,600</b>	<b>100.0%</b>		

<sup>1</sup> Visitation from western U.S. states not separated from "other" category in April 2021.

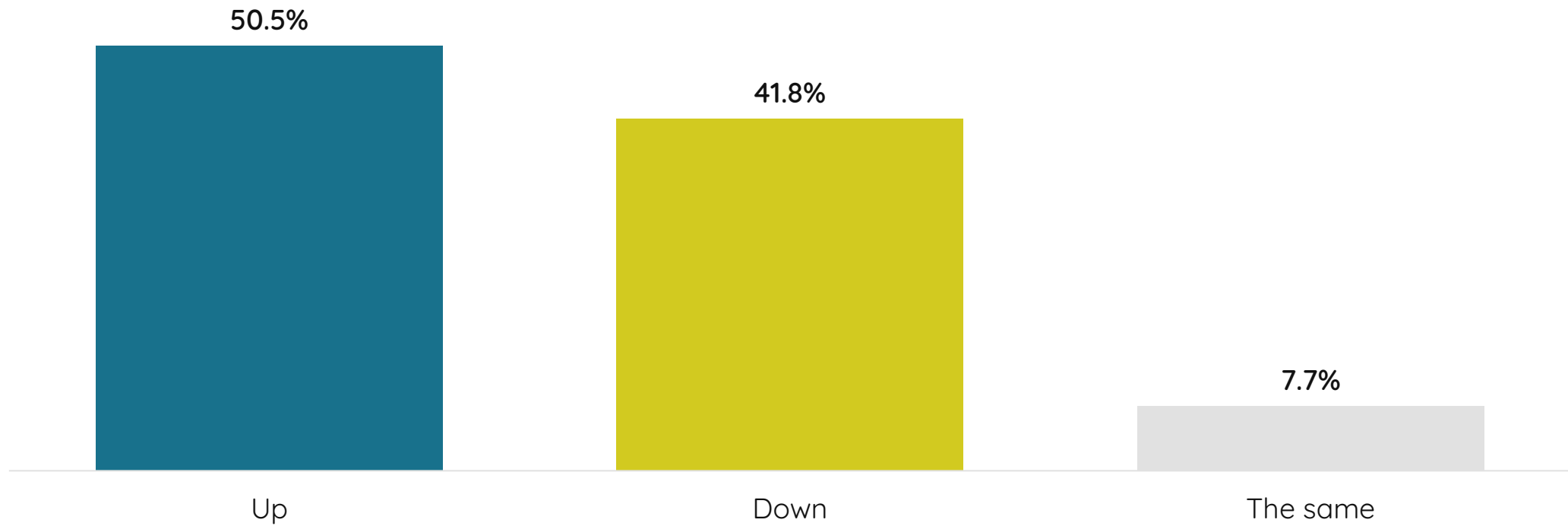
<sup>2</sup> Visitation from international markets was too small to estimate for most of 2020 and 2021.



\* Visitors staying in paid accommodations.

# 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?

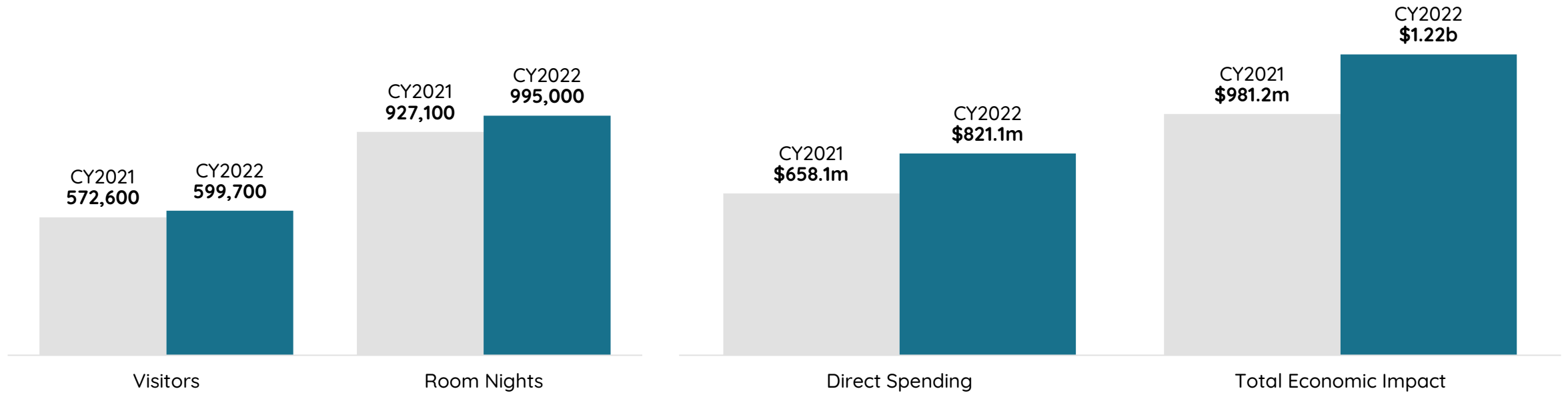


# CALENDAR YEAR- TO-DATE METRICS



# CYTD OVERNIGHT VISITATION & LODGING\*

	CYTD 2021	CYTD 2022	% Change from 2021
Visitors	572,600	599,700	+ 4.7%
Room Nights	927,100	995,000	+ 7.3%
Direct Spending	\$658,091,300	\$821,118,800	+ 24.8%
Economic Impact	\$981,214,200	\$1,224,288,200	+ 24.8%



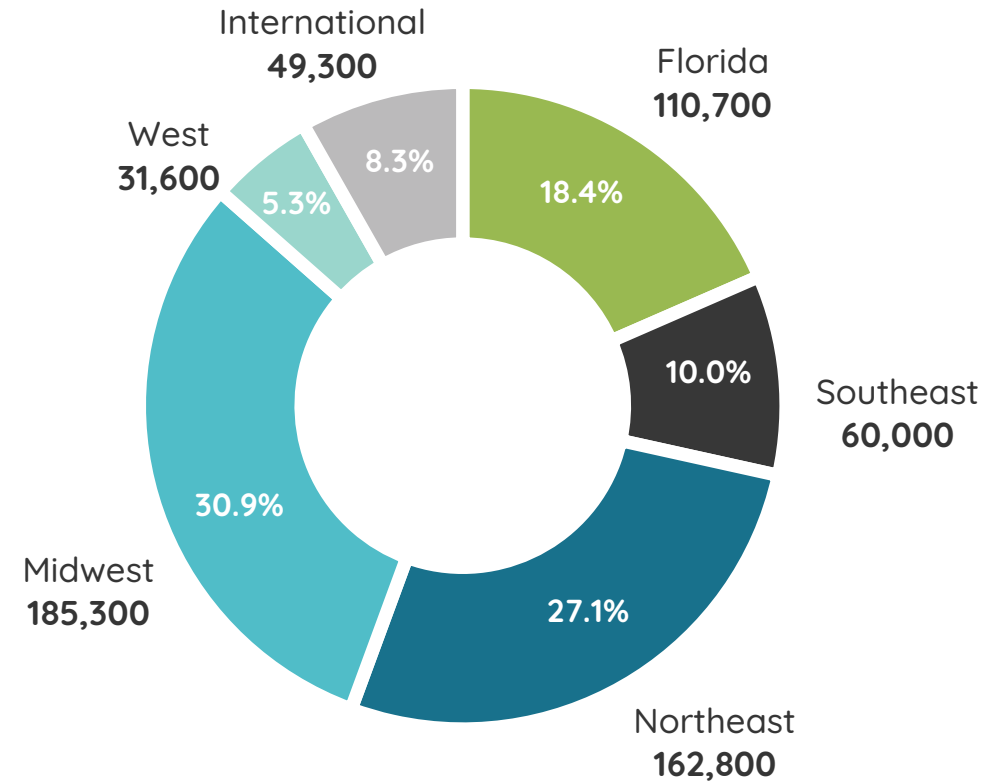
\* Visitors staying in paid accommodations.

# CYTD OVERNIGHT VISITOR ORIGIN MARKETS\*

Region	CY2021		CY2022		Percent Change (Δ%)	
	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	226,200	39.5%	110,700	18.4%	- 51.1%	- 53.4%
Southeast	49,000	8.6%	60,000	10.0%	+ 22.4%	+ 16.3%
Northeast	156,400	27.3%	162,800	27.1%	+ 4.1%	- 0.7%
Midwest	125,400	21.9%	185,300	30.9%	+ 47.8%	+ 41.1%
West <sup>1</sup>	0	0.0%	31,600	5.3%	-	-
Canada <sup>2</sup>	2,900	0.5%	12,800	2.1%	+ 341.4%	+ 320.0%
Europe <sup>2</sup>	12,700	2.2%	24,900	4.2%	+ 96.1%	+ 90.9%
C/S America <sup>2</sup>	0	0.0%	5,200	0.9%	-	-
Other	0	0.0%	6,400	1.1%	-	-
<b>Total</b>	<b>572,600</b>	<b>100.0%</b>	<b>599,700</b>	<b>100.0%</b>		

<sup>1</sup> Visitation from western U.S. states not separated from "other" category for most of 2021.

<sup>2</sup> Visitation from international markets was too small to estimate for most of 2020 and 2021.



\* Visitors staying in paid accommodations.



# APRIL 2022 VISITOR PROFILE

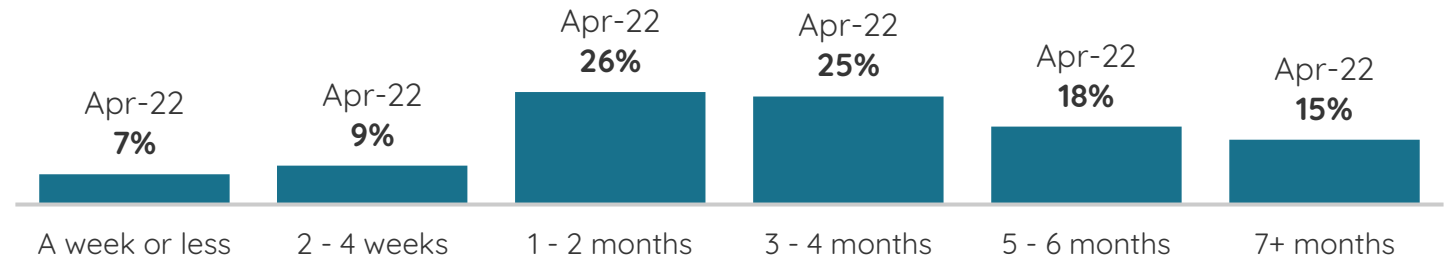
OF OVERNIGHT VISITORS





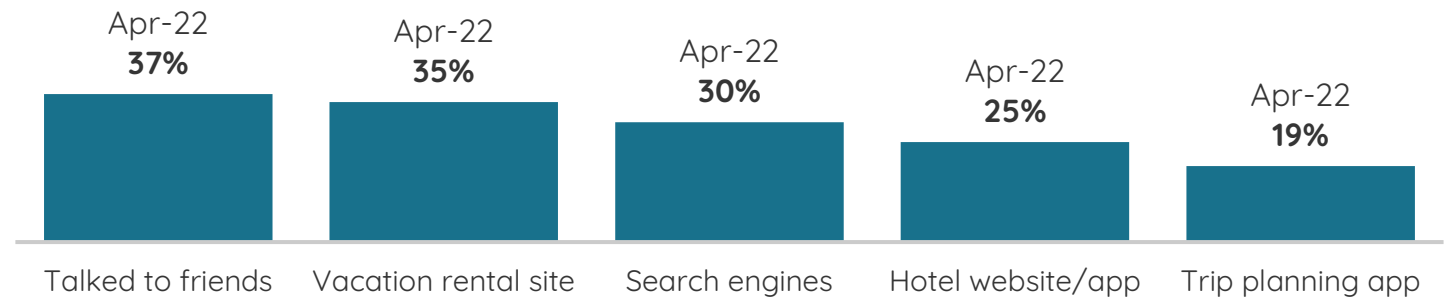
# TRIP PLANNING DECISIONS\*

Trip Planning Cycle			
	Apr-21	Apr-22	Trend
A week or less	-	7%	-
2 - 4 weeks	-	9%	-
1 - 2 months	-	26%	-
3 - 4 months	-	25%	-
5 - 6 months	-	18%	-
7+ months	-	15%	-
Median (days)	-	81	-



Top Trip Planning Resources <sup>1</sup>			
	Apr-21	Apr-22	Trend
Talked to friends	-	37%	-
Vacation rental site	-	35%	-
Search engines	-	30%	-
Hotel website/app	-	25%	-
Trip planning app	-	19%	-

<sup>1</sup> Multiple responses permitted.



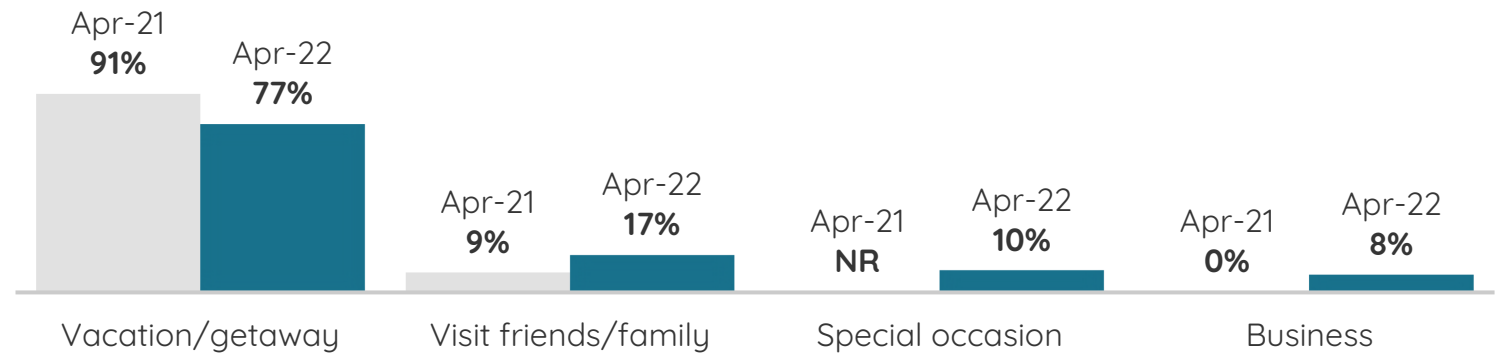
\* Visitors staying in paid accommodations.

# DECISIONS TO VISIT\*

## Top Reasons for Visiting<sup>1</sup>

	Apr-21	Apr-22	Trend
Vacation/getaway	91%	77%	↓
Visit friends/family	9%	17%	↑
Special occasion	-	10%	-
Business	0%	8%	↑

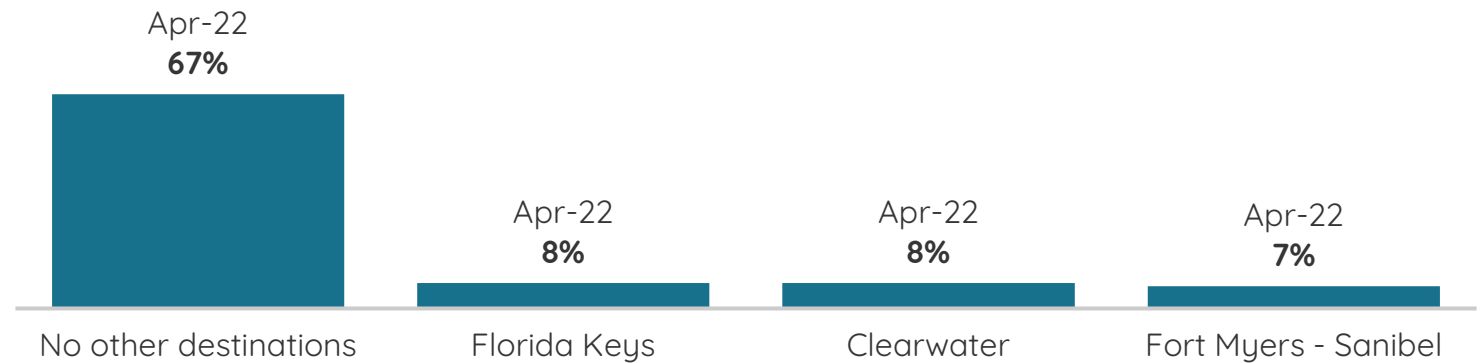
<sup>1</sup> Multiple responses permitted.



## Other Destinations Considered<sup>1</sup>

	Apr-21	Apr-22	Trend
No other destinations	-	67%	-
Florida Keys	-	8%	-
Clearwater	-	8%	-
Fort Myers - Sanibel	-	7%	-

<sup>1</sup> Multiple responses permitted.

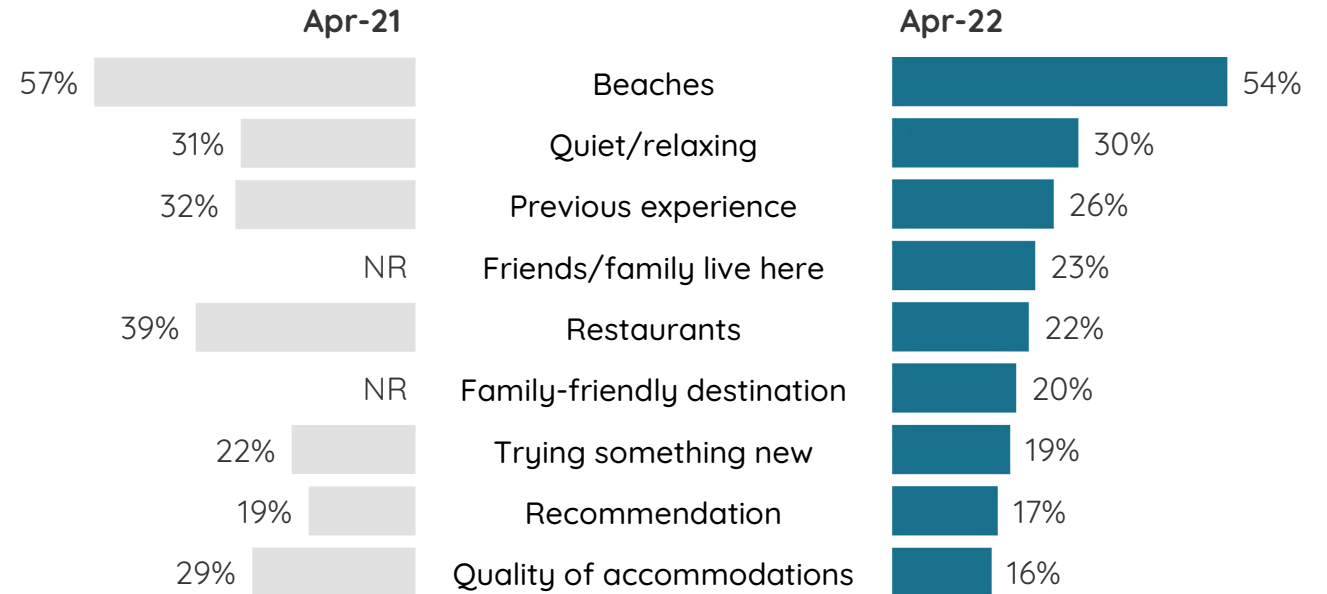


\* Visitors staying in paid accommodations.

# REASONS FOR CHOOSING AREA\*

Reasons for Choosing Area <sup>1</sup>			
	Apr-21	Apr-22	Trend
Beaches	57%	54%	↓
Quiet/relaxing	31%	30%	↓
Previous experience	32%	26%	↓
Friends/family live here	-	23%	-
Restaurants	39%	22%	↓
Family-friendly destination	-	20%	-
Trying something new	22%	19%	↓
Recommendation	19%	17%	↓
Quality of accommodations	29%	16%	↓

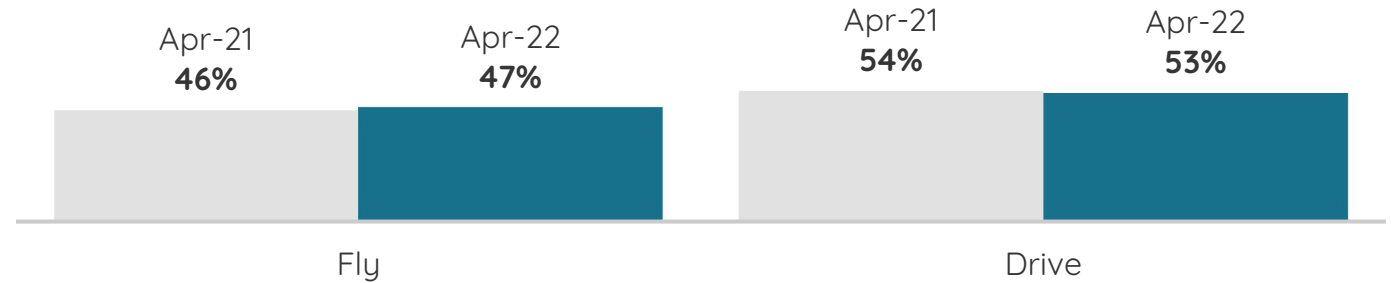
<sup>1</sup> Multiple responses permitted.



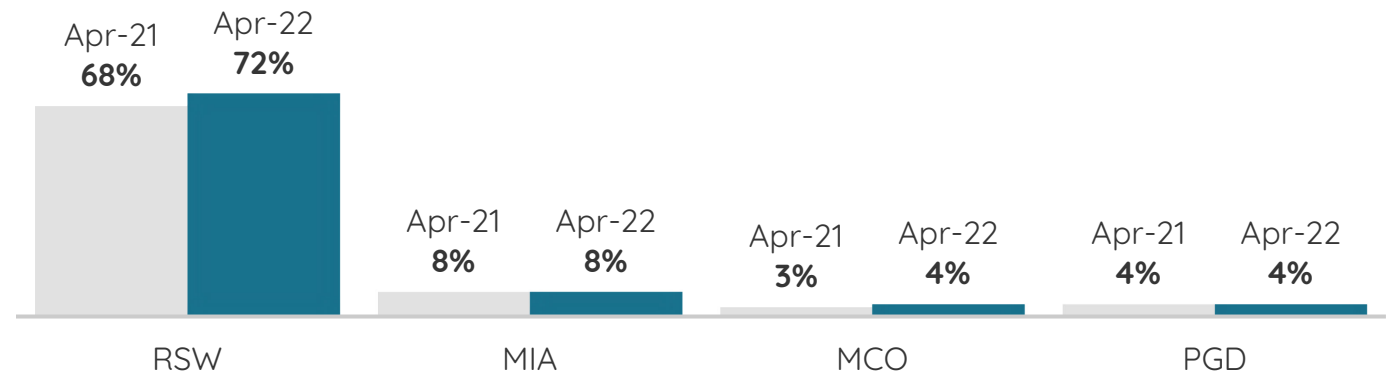
\* Visitors staying in paid accommodations.

# TRANSPORTATION METHODS\*

Mode of Transportation			
	Apr-21	Apr-22	Trend
Fly	46%	47%	↑
Drive	54%	53%	↓



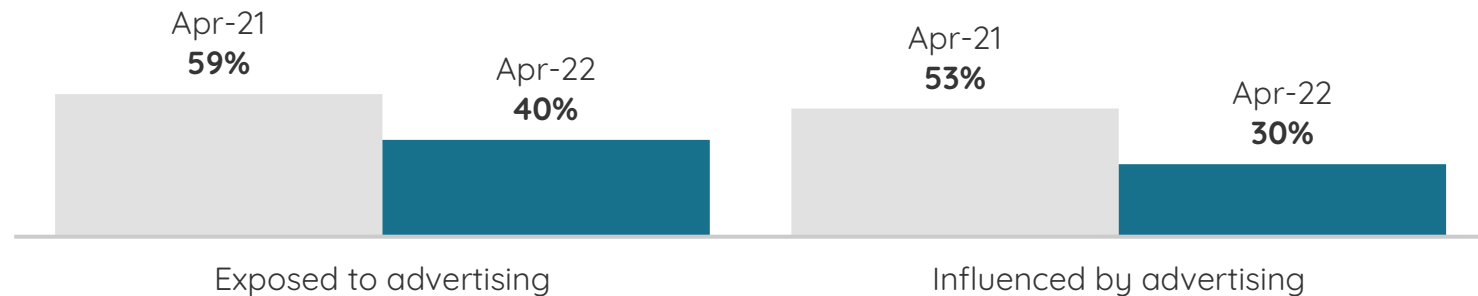
Airport Deplaned (Base: Fly)			
	Apr-21	Apr-22	Trend
SWFL Intl Airport (RSW)	68%	72%	↑
Miami Intl Airport (MIA)	8%	8%	↔
Orlando Intl Airport (MCO)	3%	4%	↑
Punta Gorda Airport (PGD)	4%	4%	↔



\* Visitors staying in paid accommodations.

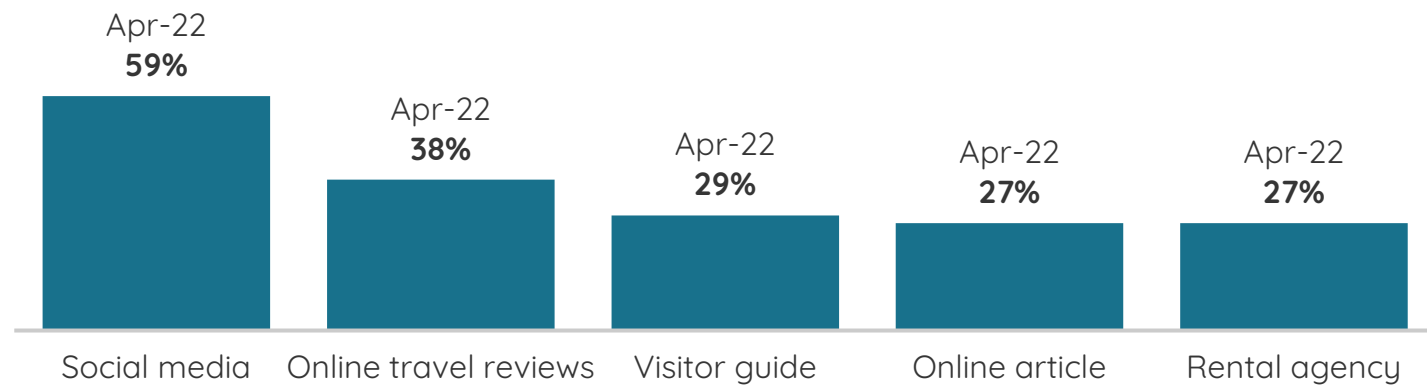
# EXPOSURE TO ADVERTISING\*

Advertising Exposure & Influence			
	Apr-21	Apr-22	Trend
Exposed to advertising	59%	40%	↓
Influenced by advertising	53%	30%	↓



Top Advertising Sources Noticed <sup>1</sup>			
	Apr-21	Apr-22	Trend
Social media	-	59%	-
Online travel reviews	-	38%	-
Visitor guide	-	29%	-
Online article	-	27%	-
Rental agency	-	27%	-

<sup>1</sup>Base of visitors exposed to advertising. Multiple responses permitted.



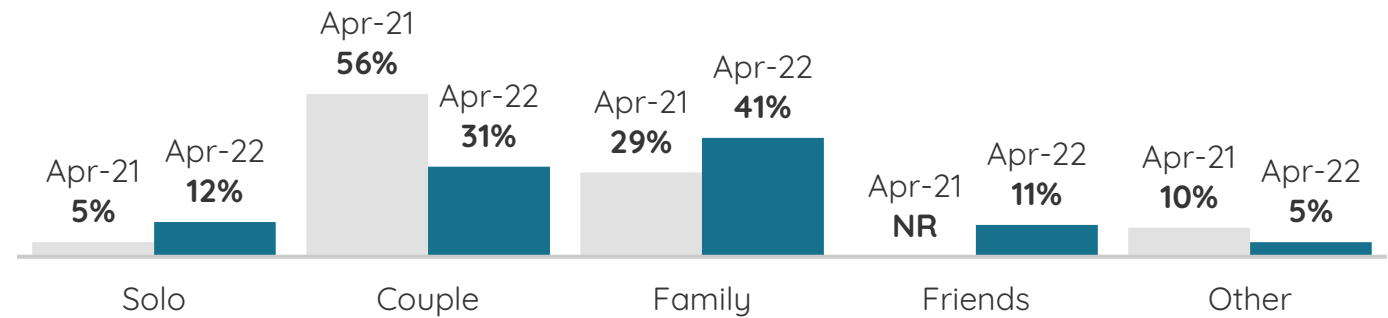
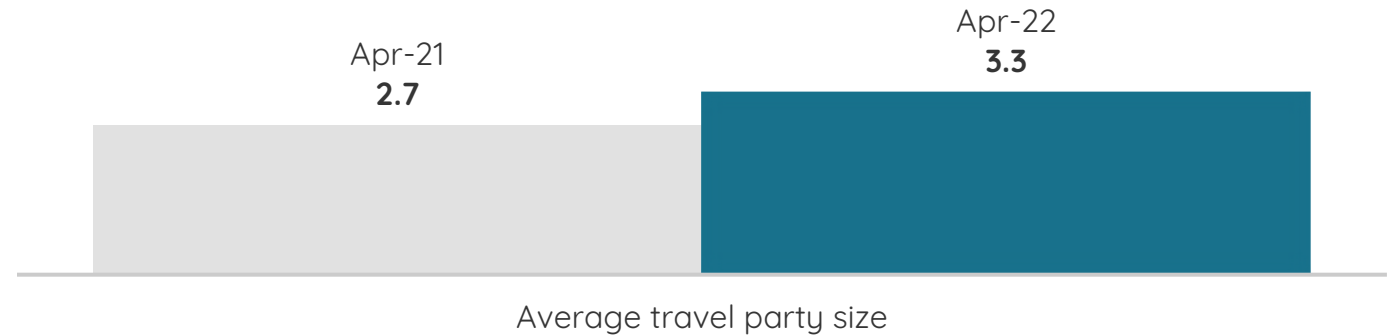
\* Visitors staying in paid accommodations.

## Average Visitors per Travel Party

	Apr-21	Apr-22	Trend
Average travel party size	2.7	3.3	↑

## Travel Party Composition

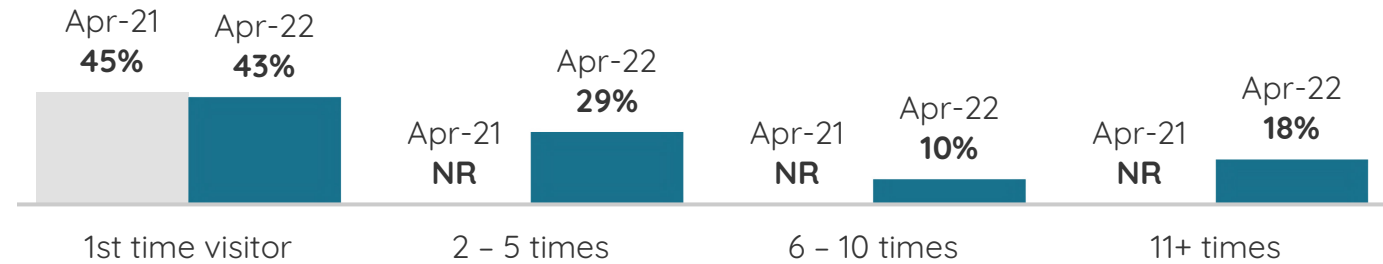
	Apr-21	Apr-22	Trend
Solo	5%	12%	↑
Couple	56%	31%	↓
Family	29%	41%	↑
Friends	-	11%	-
Other	10%	5%	↓



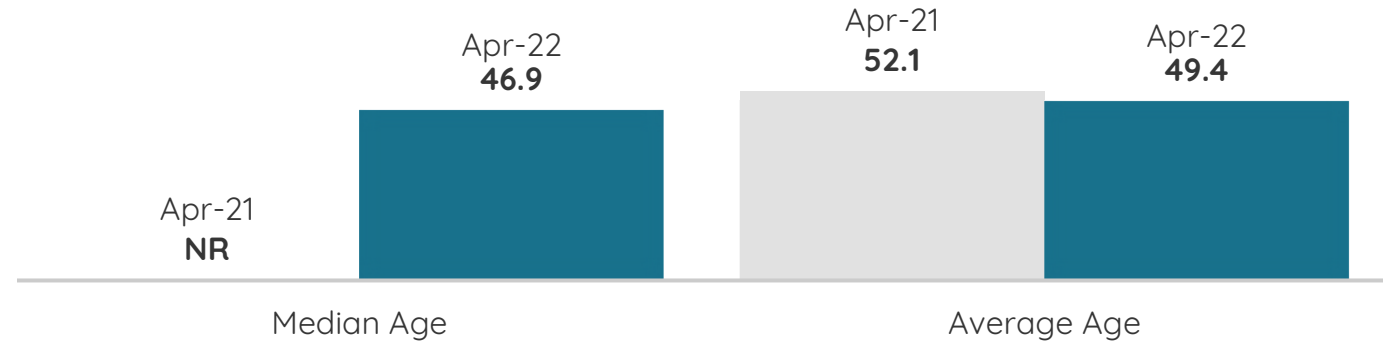
\* Visitors staying in paid accommodations.

# VISITING PARADISE COAST\*

Previous Visits			
	Apr-21	Apr-22	Trend
1 <sup>st</sup> time visitor	45%	43%	↓
2 – 5 times	-	29%	-
6 – 10 times	-	10%	-
11+ times	-	18%	-



Typical Visitor Ages			
	Apr-21	Apr-22	Trend
Median Age	-	46.9	-
Average Age	52.1	49.4	↓

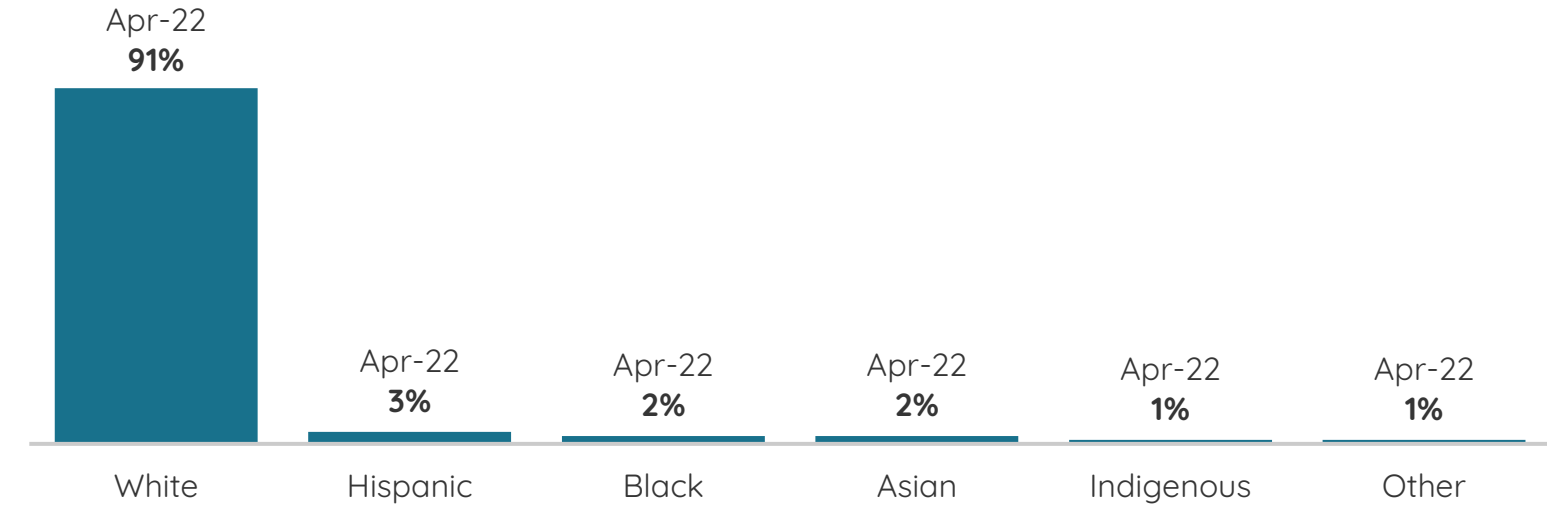


\* Visitors staying in paid accommodations.



# VISITOR DEMOGRAPHICS\*

Race/Ethnicity			
	Apr-21	Apr-22	Trend
White	-	91%	-
Hispanic	-	3%	-
Black	-	2%	-
Asian	-	2%	-
Indigenous	-	1%	-
Other	-	1%	-



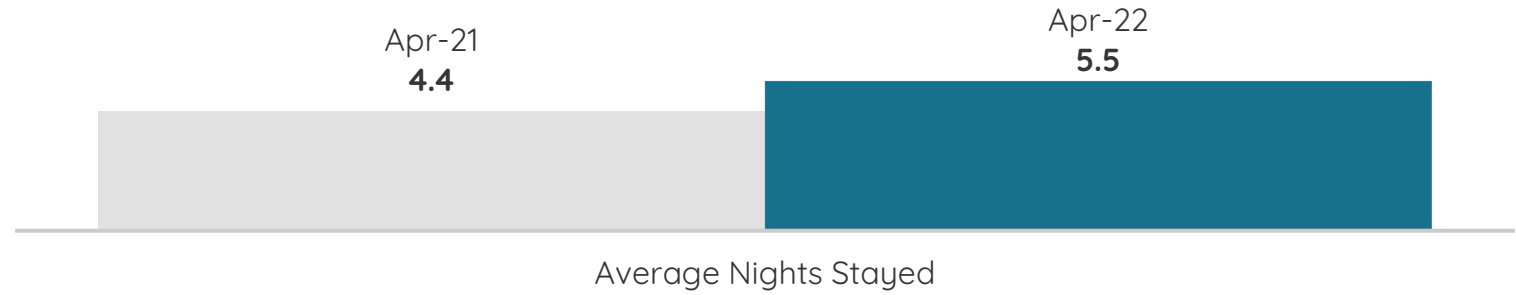
Typical Visitor Household Income			
	Apr-21	Apr-22	Trend
Median HHI	\$170,881	\$166,700	↓



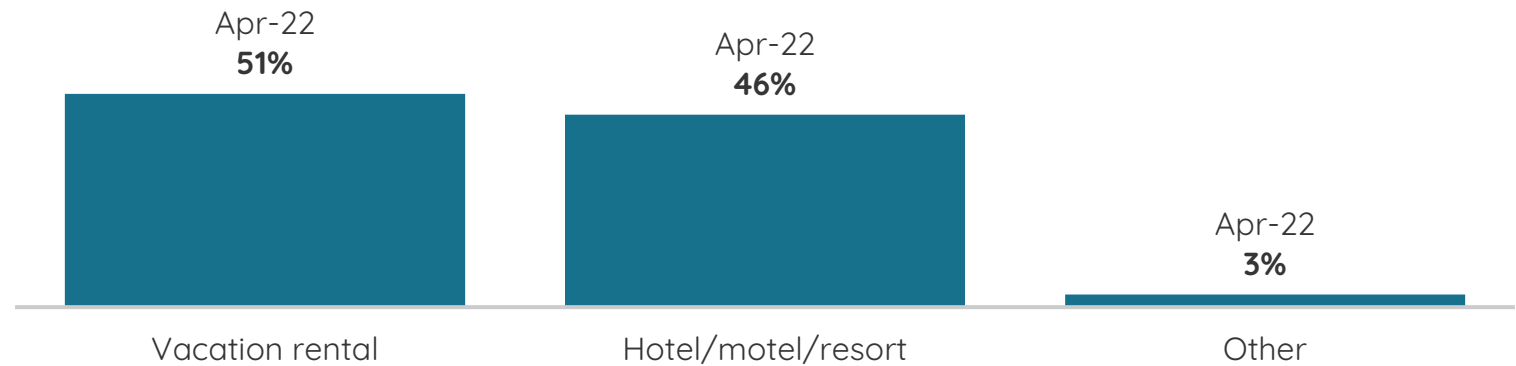
\* Visitors staying in paid accommodations.

# OVERNIGHT VISITS\*

Nights in Destination			
	Apr-21	Apr-22	Trend
Nights Stayed (mean)	4.4	5.5	↑



Accommodations			
	Apr-21	Apr-22	Trend
Vacation rental	-	51%	-
Hotel/motel/resort	-	46%	-
Other	-	3%	-

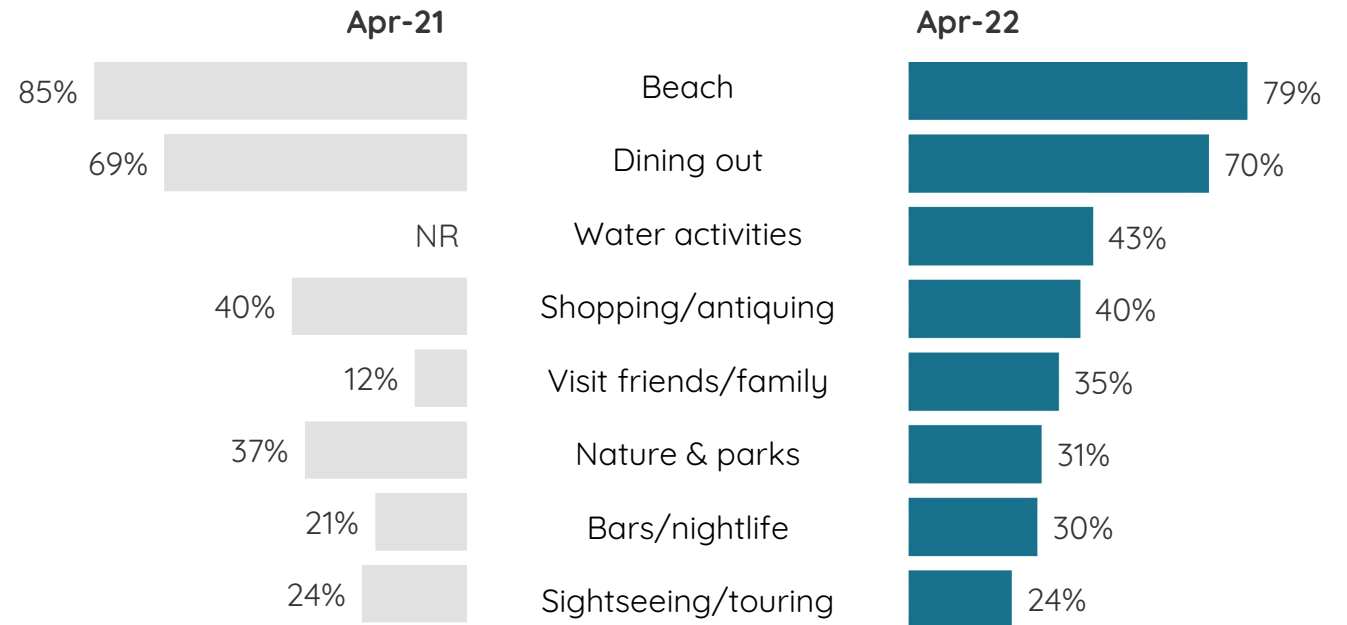


\* Visitors staying in paid accommodations.

# TRIP ACTIVITIES\*

Trip Activities <sup>1</sup>			
	Apr-21	Apr-22	Trend
Beach	85%	79%	↓
Dining out	69%	70%	↑
Water activities	-	43%	-
Shopping/antiquing	40%	40%	↔
Visit friends/family	12%	35%	↑
Nature & parks	37%	31%	↓
Bars/nightlife	21%	30%	↑
Sightseeing/touring	24%	24%	↔

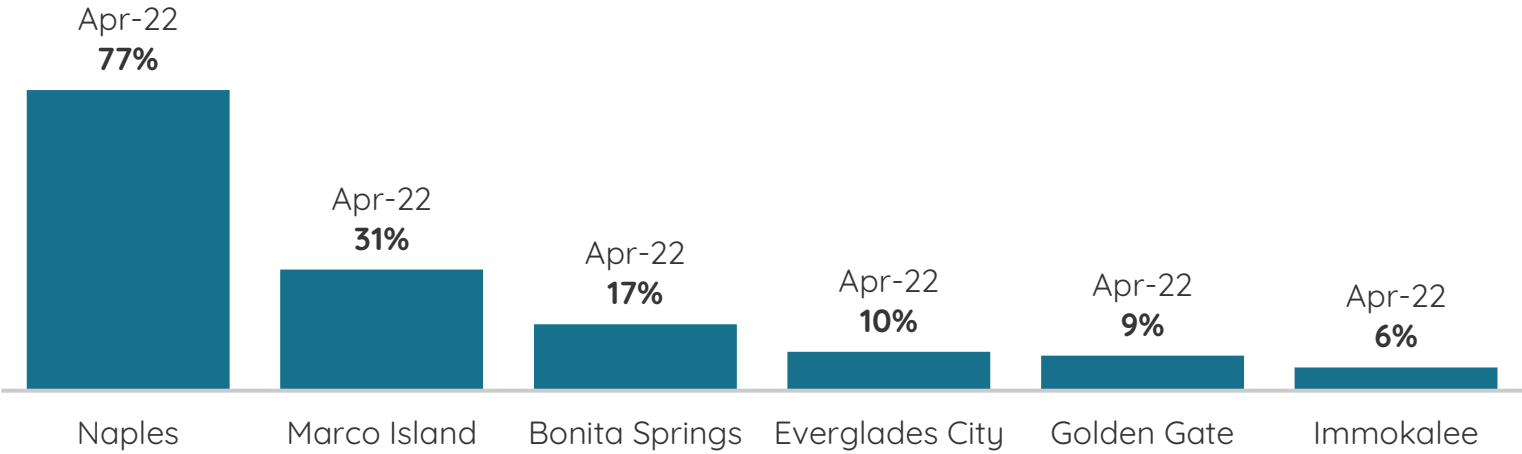
<sup>1</sup> Multiple responses permitted.



\* Visitors staying in paid accommodations.

# AREAS VISITED\*

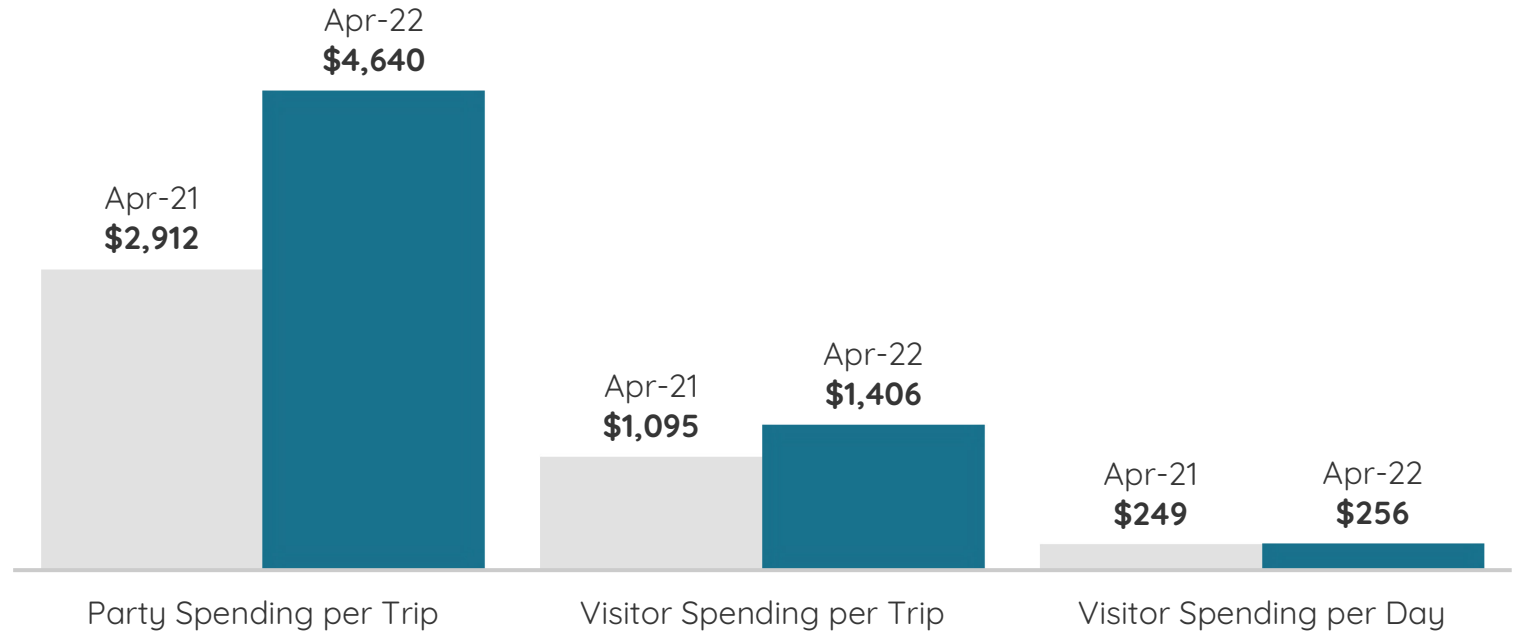
Areas Visited in Destination			
	Apr-21	Apr-22	Trend
Naples	-	77%	-
Marco Island	-	31%	-
Bonita Springs	-	17%	-
Everglades City	-	10%	-
Golden Gate	-	9%	-
Immokalee	-	6%	-



\* Visitors staying in paid accommodations.

# VISITOR SPENDING\*

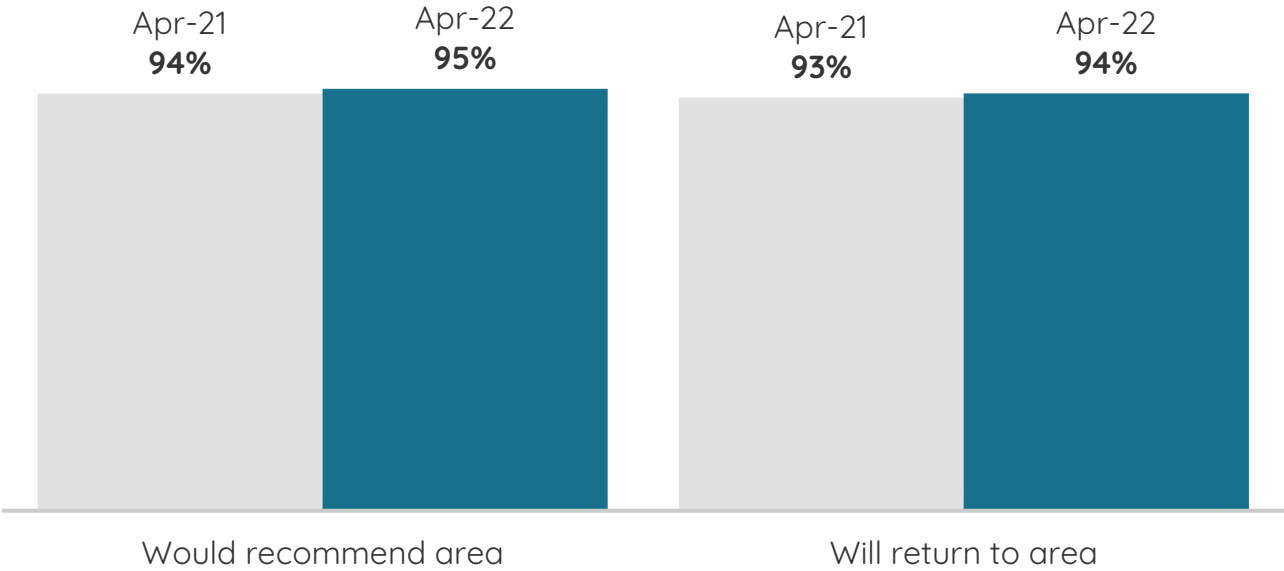
Visitor Spending			
	Apr-21	Apr-22	Trend
Party Spending per Trip	\$2,912	\$4,640	↑
Visitor Spending per Trip	\$1,095	\$1,406	↑
Visitor Spending per Day	\$249	\$256	↑



\* Visitors staying in paid accommodations.

Satisfaction with Destination			
	Apr-21	Apr-22	Trend
Value for travel dollar <sup>1</sup>	-	8.9	-
Would recommend area	94%	95%	↑
Will return to area	93%	94%	↑

<sup>1</sup>10-point scale where 10 is “excellent” and 1 is “poor”.



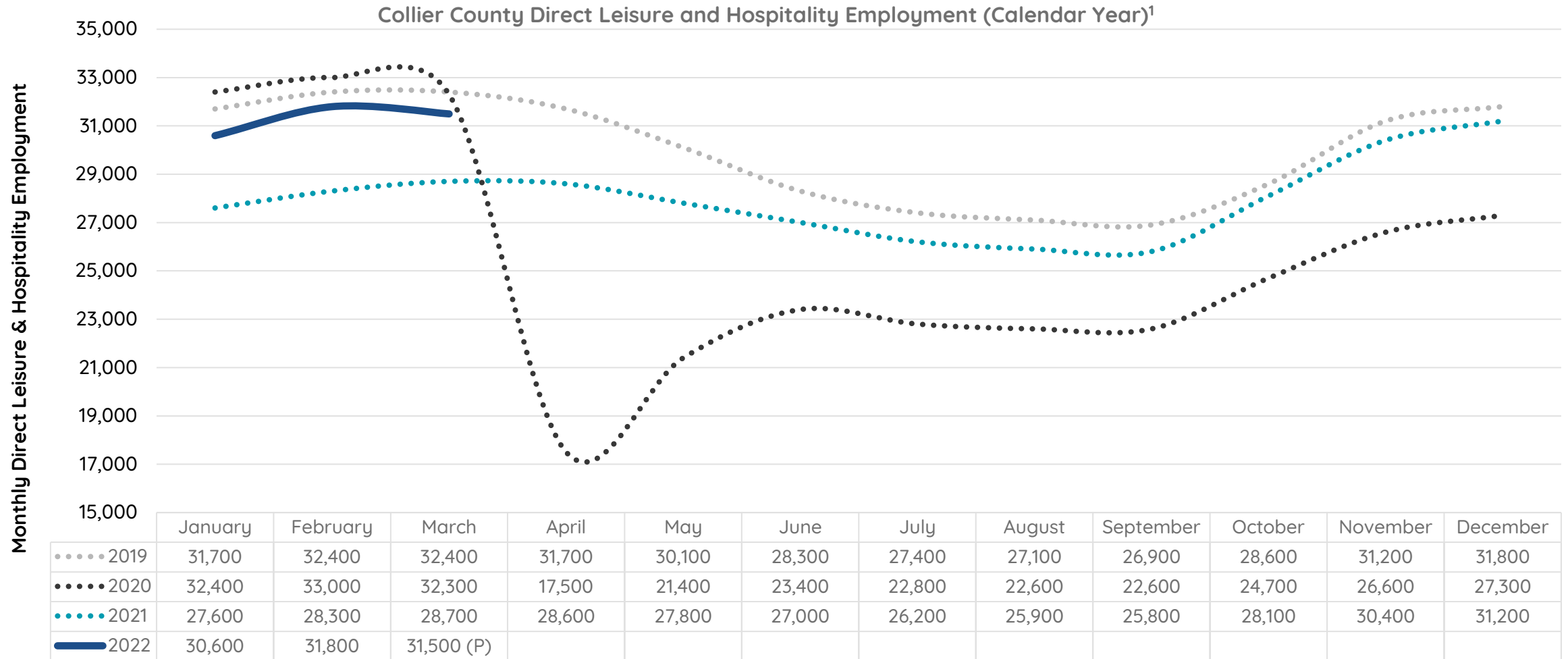
\* Visitors staying in paid accommodations.

# INDUSTRY DATA



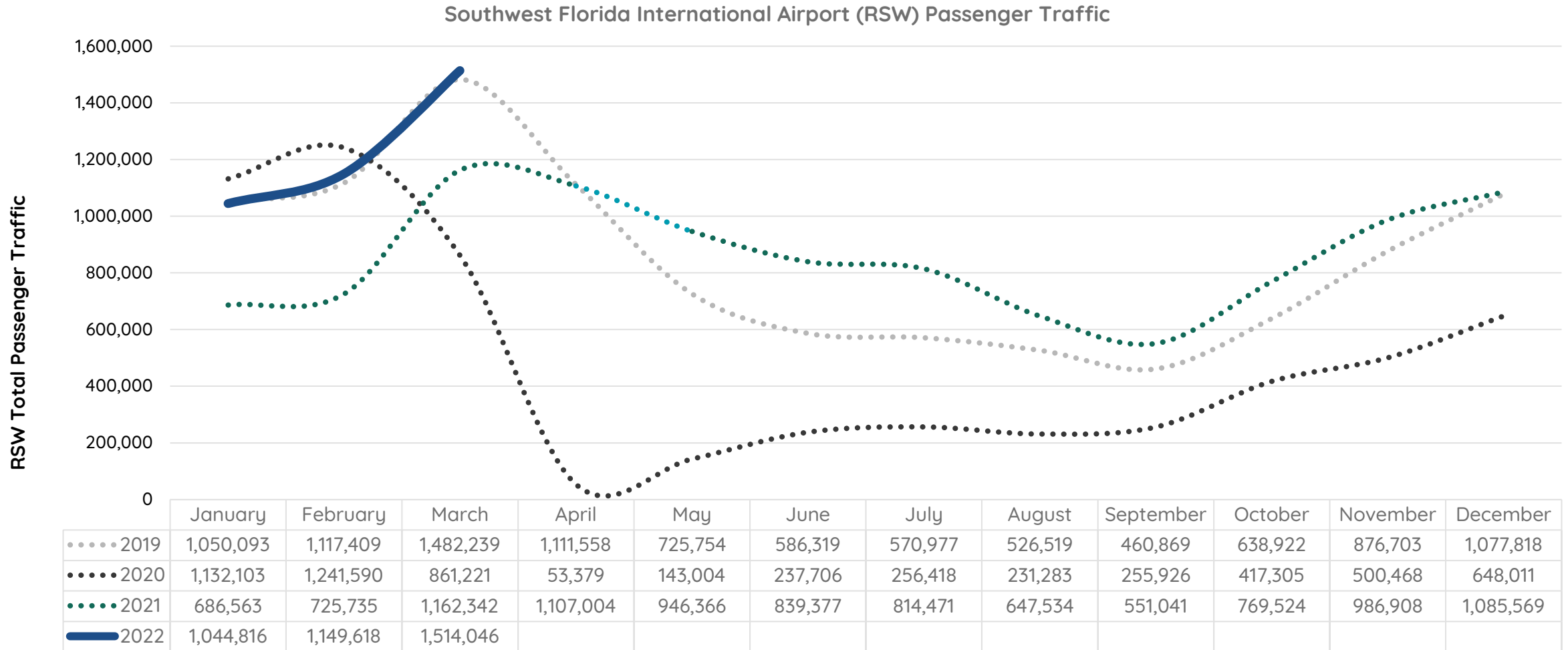


# LEISURE & HOSPITALTY EMPLOYMENT



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

# RSW PASSENGER TRAFFIC



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

# LICENSED TRANSIENT RENTAL UNITS

April 2022 Licensed Transient Rental Units <sup>1</sup>				
	Hotel	Motel	Vacation Rental	Total
Naples	4,309	1,379	3,021	8,709
Marco Island	1,378	115	1,596	3,089
Immokalee	0	55	104	159
Golden Gate	0	150	0	150
Everglades City	38	36	14	88
Bonita Springs	0	5	59	64
Goodland	0	5	4	9
Chokoloskee	0	13	2	15
Ochopee	0	0	2	2
Ave Maria	0	0	1	1
<b>Total</b>	<b>5,725</b>	<b>1,758</b>	<b>4,803</b>	<b>12,286</b>

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

# NAPLES, MARCO ISLAND, EVERGLADES

## Convention & Visitors Bureau April 2022 Monthly Dashboard

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