

NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau
April 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.



Occupancy, ADR, and RevPAR in April were down compared to the historic levels of 2022. However, when compared to 2019 levels, although occupancy was still down, ADR and RevPAR were up roughly 20%.



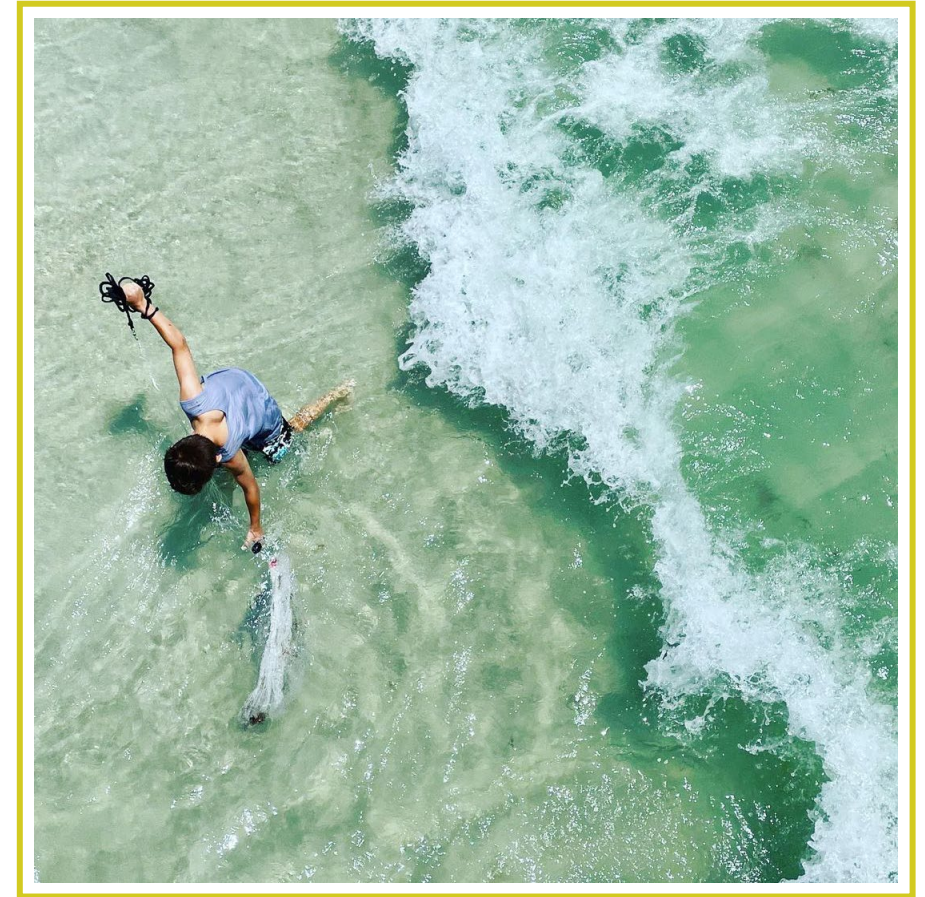
The drops in visitation, room nights, and visitor days were driven mainly by the decreased occupancy level, fewer available units, a longer length of stay, and fewer day trippers.



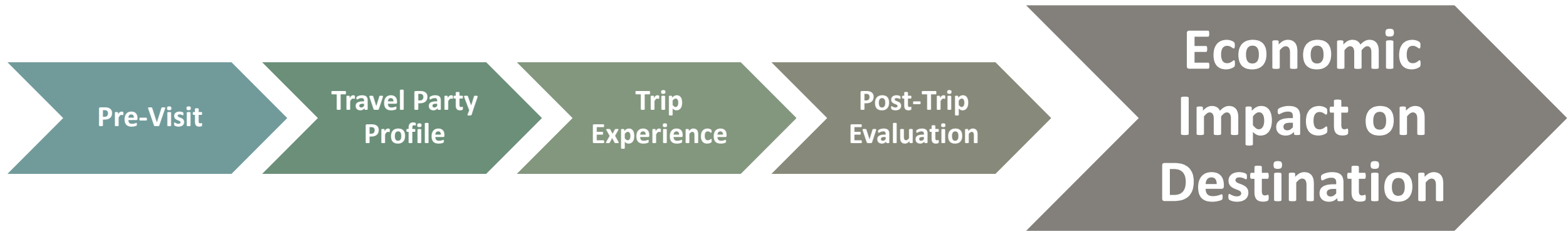
International visitation is continuing to recover steadily. So far in 2023, international visitation has accounted for 127,000 (12.3% of total) visitors to the Naples area. This is up from 106,000 (9.3% of total) during the same period in 2022.



Advertising exposure increased by 15% compared to April 2022, while the share of total visitors who were influenced to visit because of advertising also saw a slight increase (+5%).



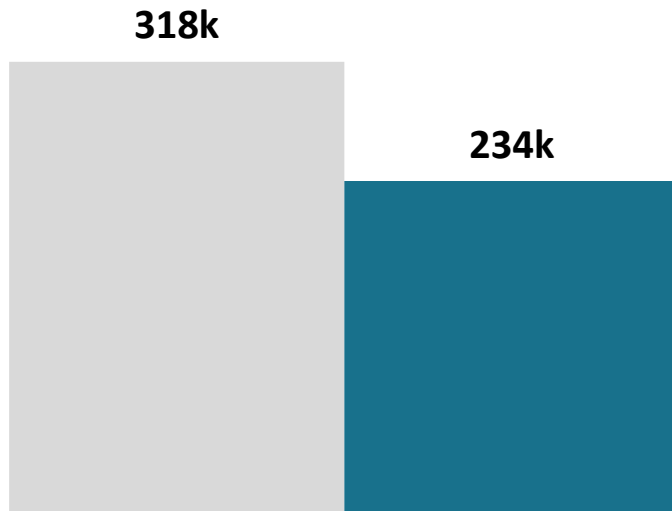
VISITOR JOURNEY: ECONOMIC IMPACT



APRIL 2023 VISITATION & ROOM NIGHTS

VISITORS

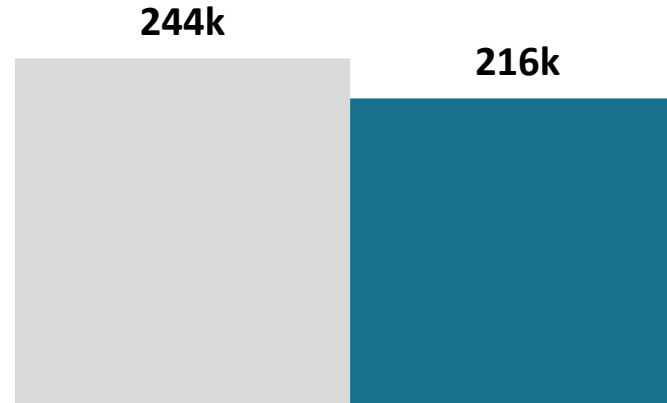
234,100



- 26.4% from 2022

ROOM NIGHTS

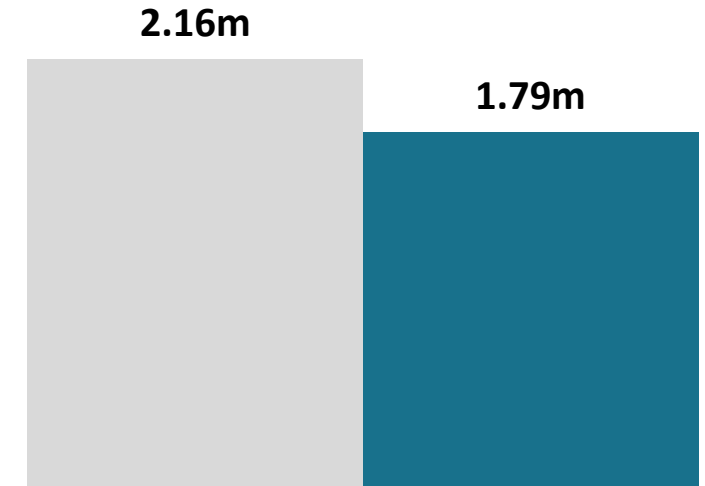
216,200



- 11.5% from 2022

VISITOR DAYS

1,788,500

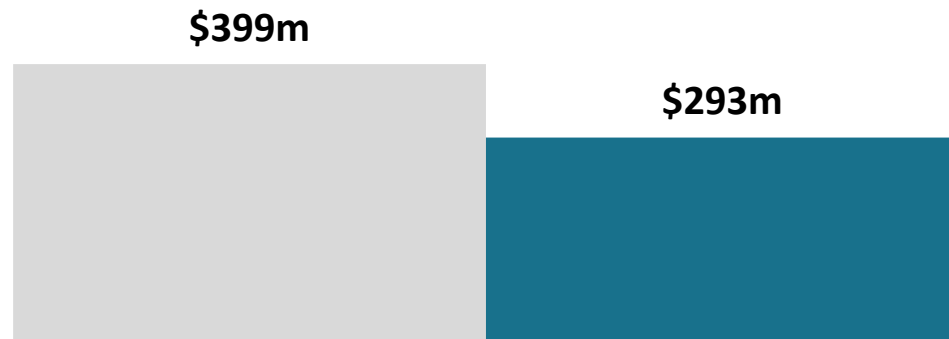


- 21.5% from 2022

■ Apr-22 ■ Apr-23

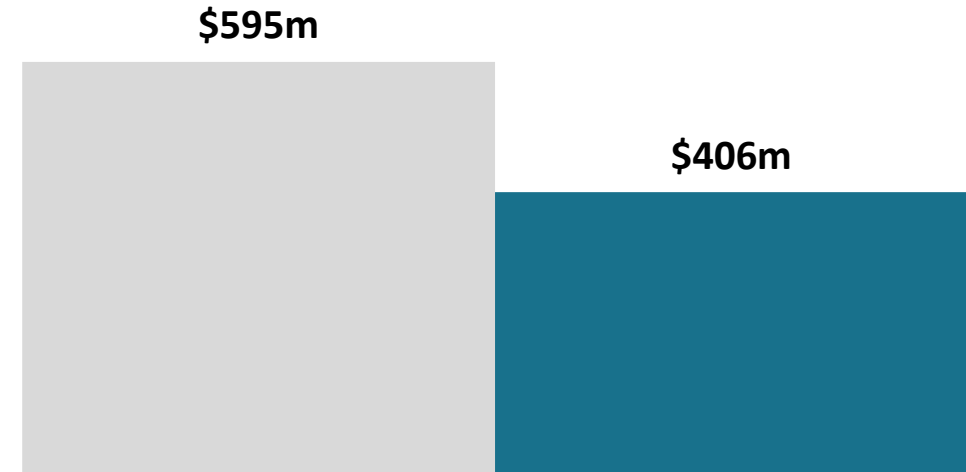
APRIL 2023 SPENDING & ECONOMIC IMPACT

DIRECT SPENDING
\$292,694,400



- 26.6% from 2022

ECONOMIC IMPACT
\$406,259,800



- 31.7% from 2022¹

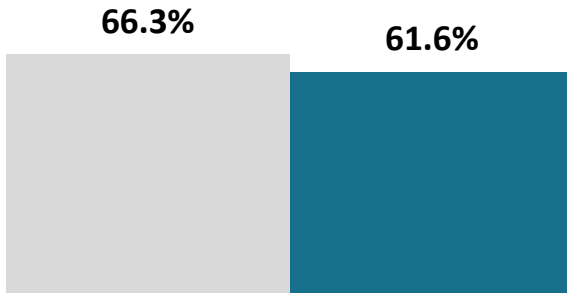
■ Apr-22 ■ Apr-23

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

APRIL 2023 OVERALL LODGING METRICS¹

OCCUPANCY RATE

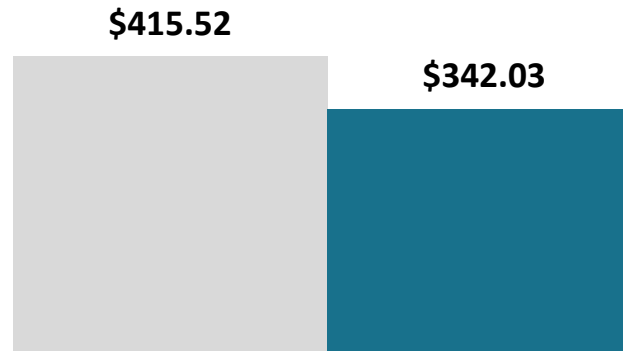
61.6%



- 7.1% from 2022

AVERAGE DAILY RATE

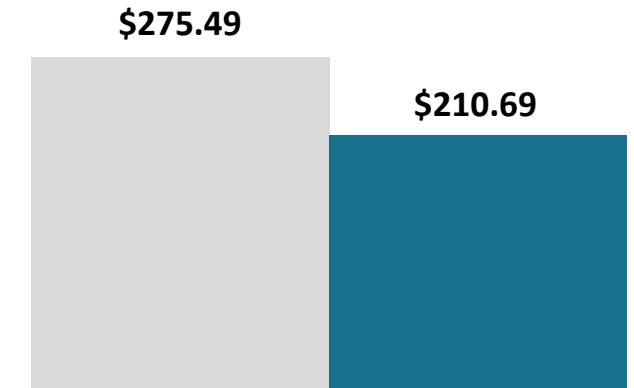
\$342.03



- 17.7% from 2022

REVENUE PER AVAILABLE ROOM

\$210.69



- 23.5% from 2022

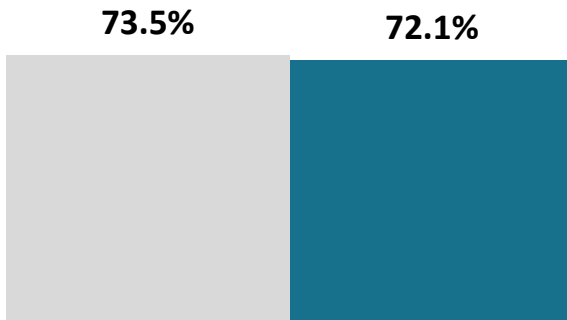
■ Apr-22 ■ Apr-23

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

APRIL 2023 HOTEL LODGING METRICS¹

OCCUPANCY RATE

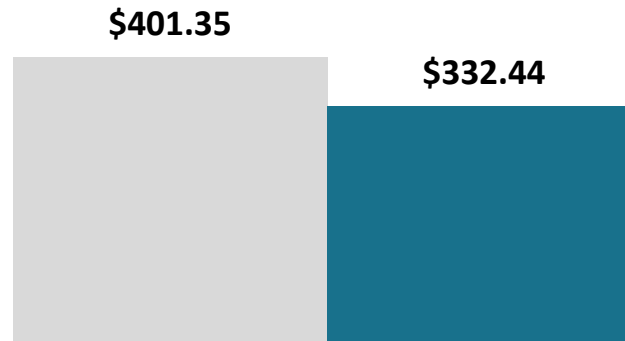
72.1%



- 1.9% from 2022

AVERAGE DAILY RATE

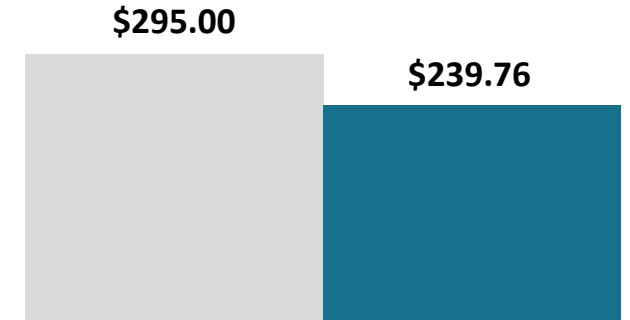
\$332.44



- 17.2% from 2022

REVENUE PER AVAILABLE ROOM

\$239.76

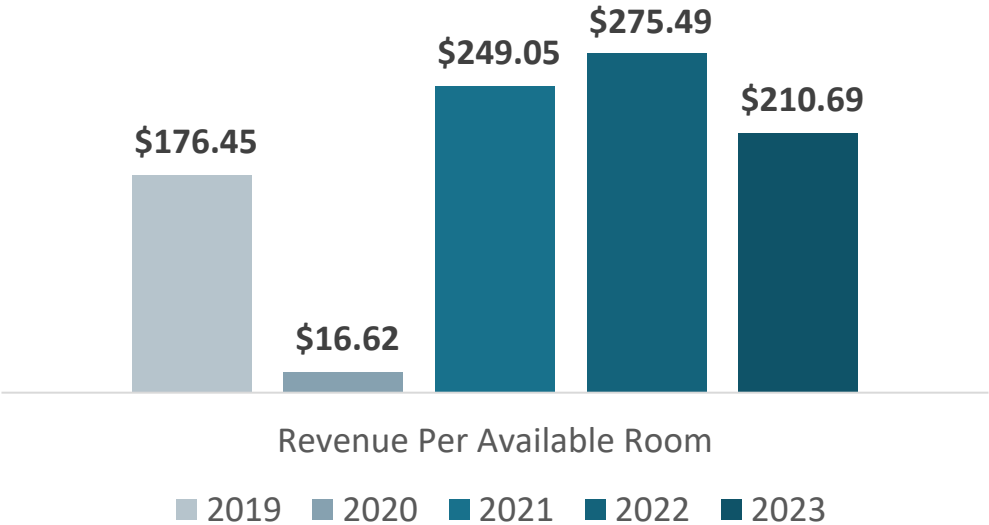
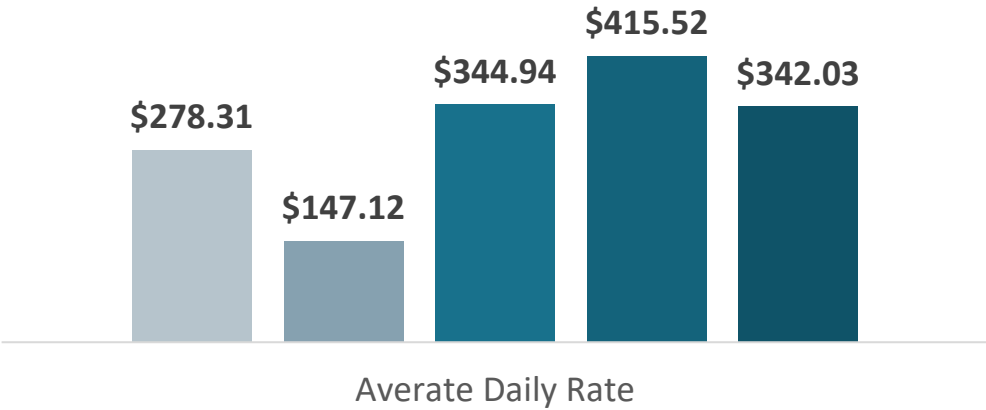
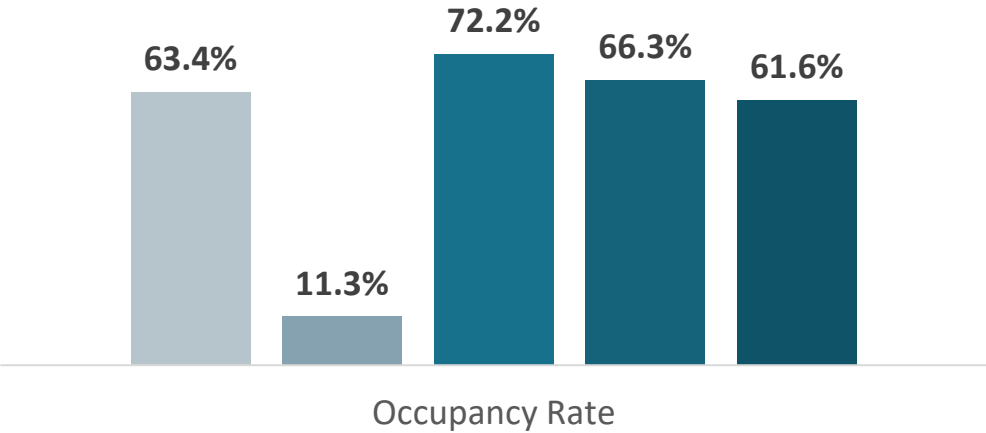


- 18.7% from 2022

■ Apr-22 ■ Apr-23

¹Source: STR Reports

APRIL 2019-2023 OVERALL LODGING METRICS¹



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

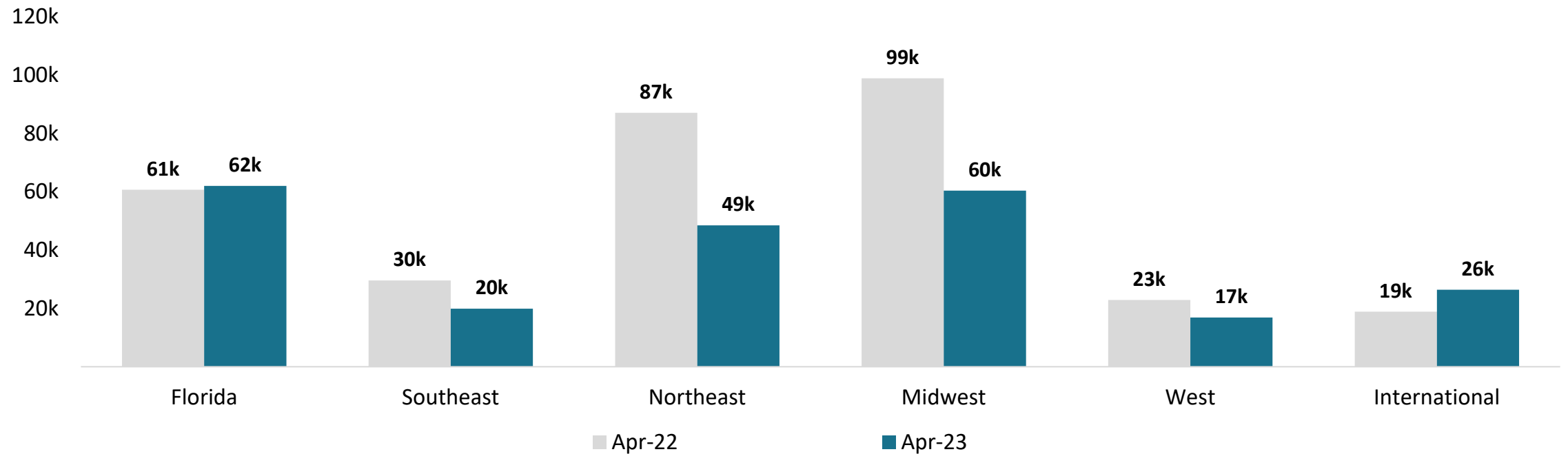
VISITOR ORIGIN

FLORIDA VISITORS

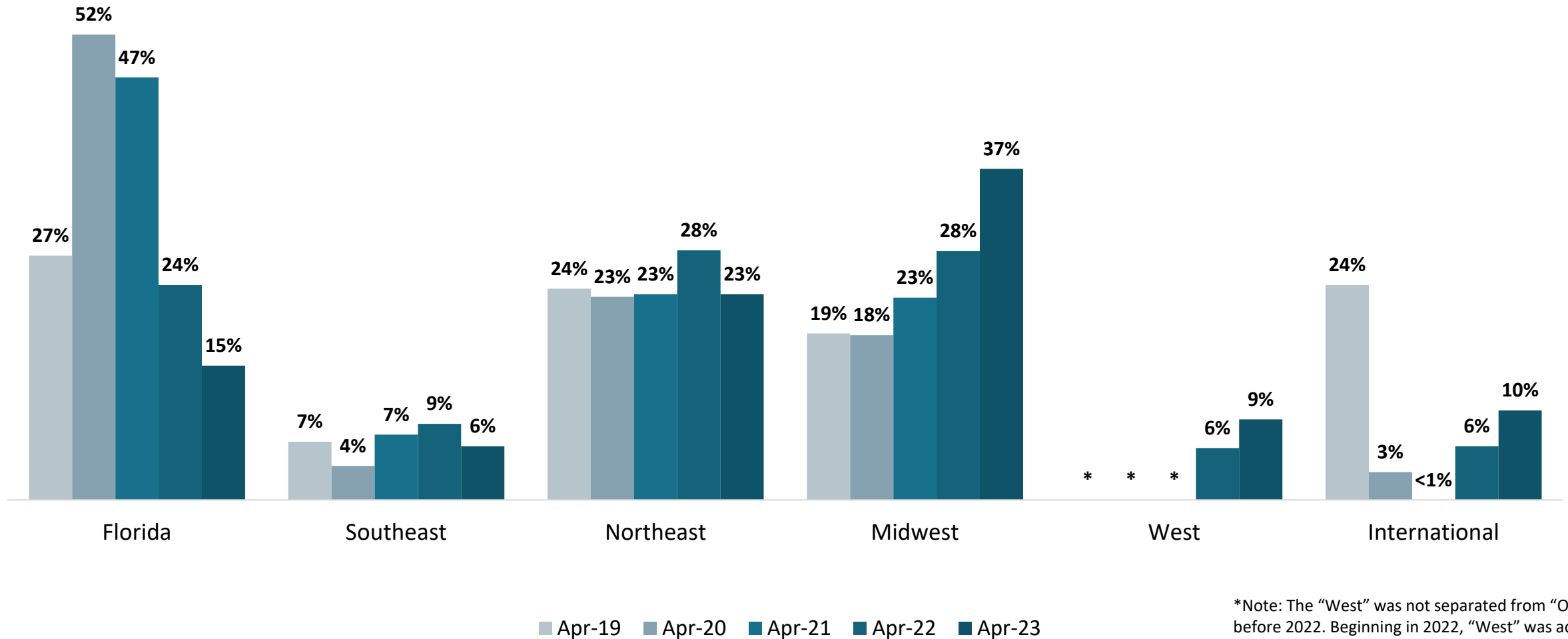
62,000

OUT-OF-STATE VISITORS

172,100



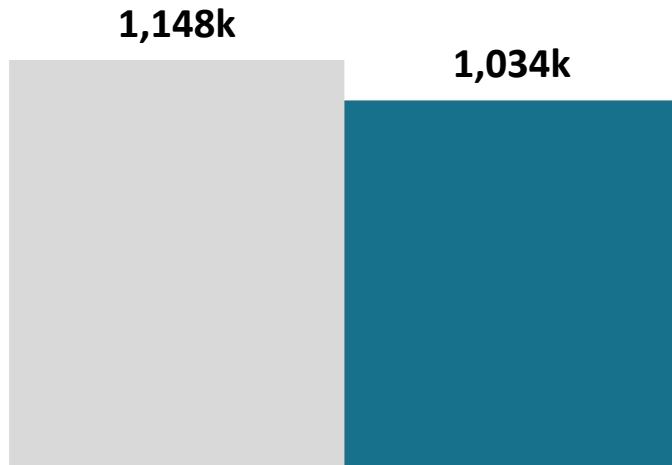
APRIL 2019-2023 OVERNIGHT VISITOR ORIGIN



YEAR-TO-DATE VISITATION METRICS

CYTD VISITORS

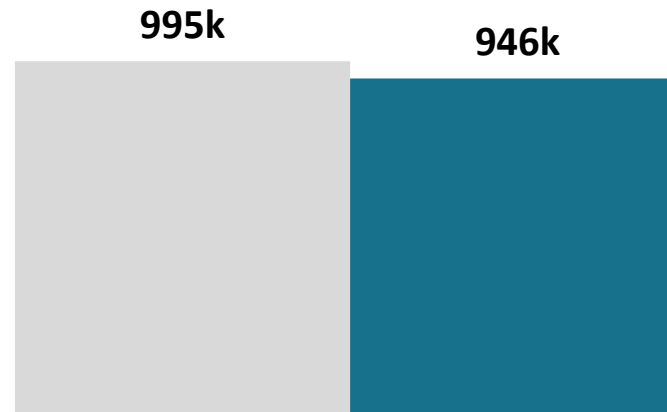
1,033,800



- 9.9% from 2022

CYTD ROOM NIGHTS

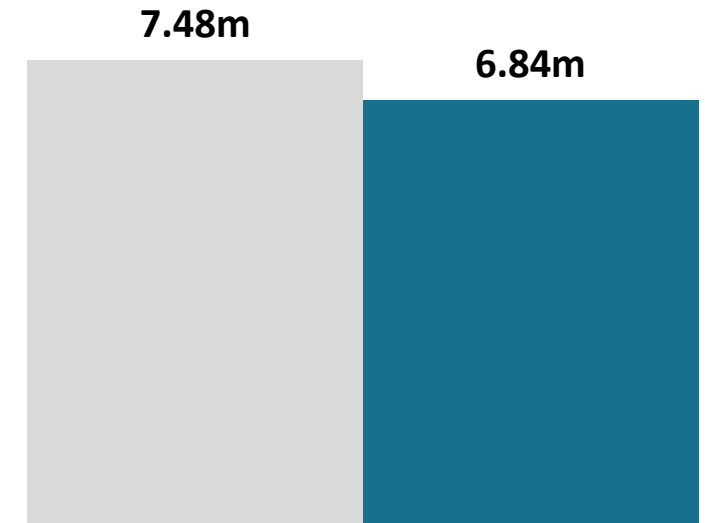
946,100



- 4.9% from 2022

CYTD VISITOR DAYS

6,841,400



- 8.6% from 2022

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YEAR-TO-DATE SPENDING & ECONOMIC IMPACT

CYTD DIRECT SPENDING

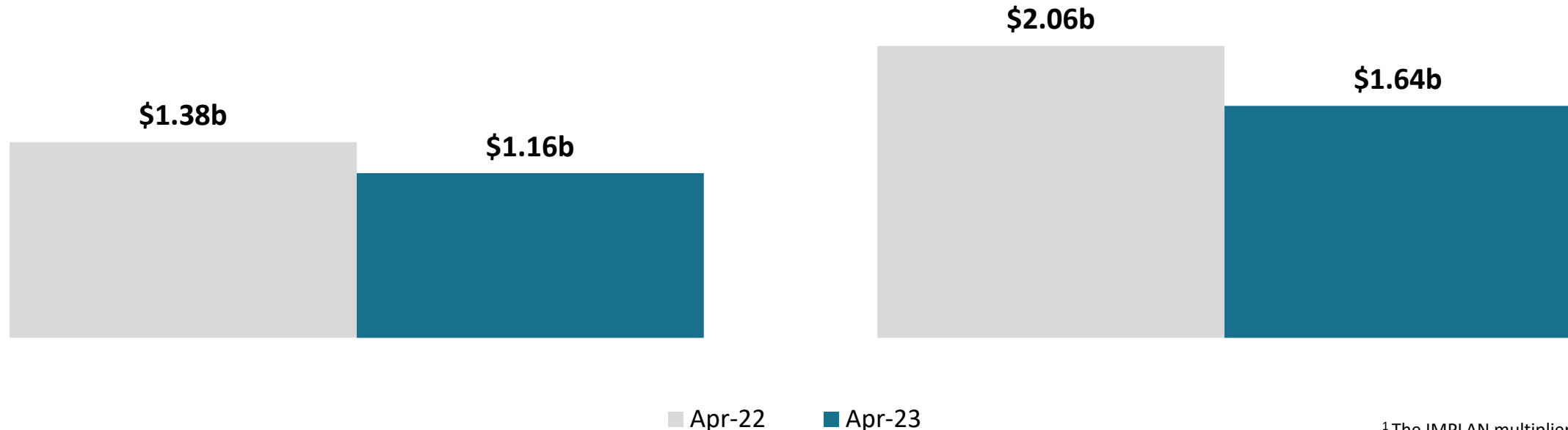
\$1,160,793,500

- 15.9% from 2022

CYTD ECONOMIC IMPACT

\$1,635,244,600

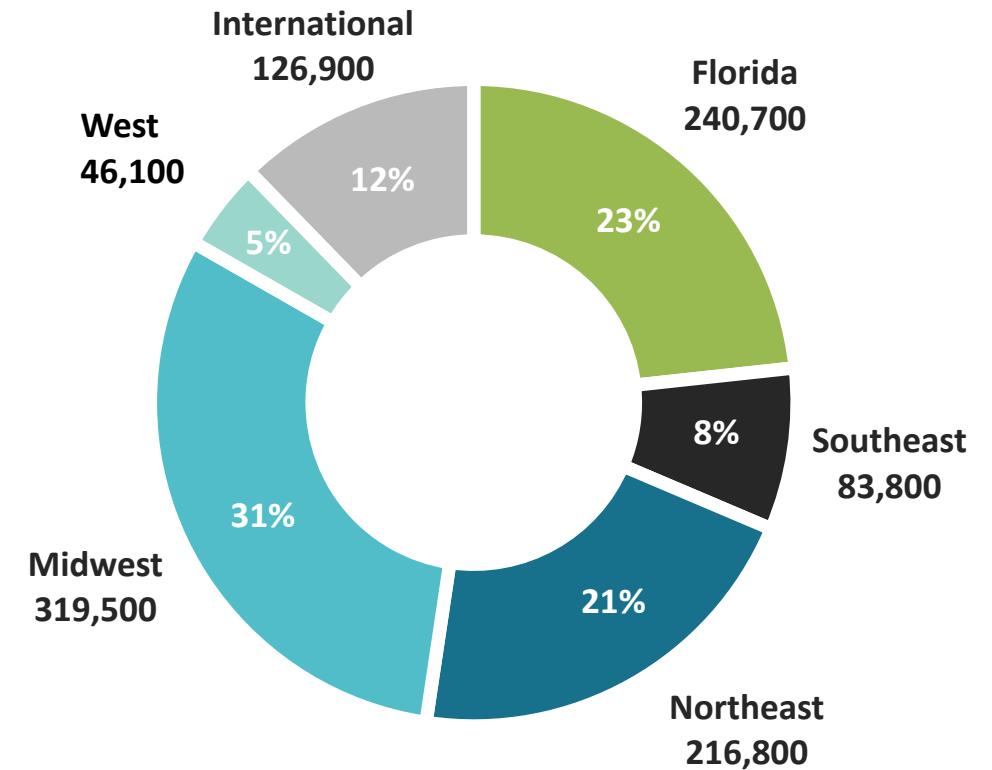
- 20.5% from 2022¹



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

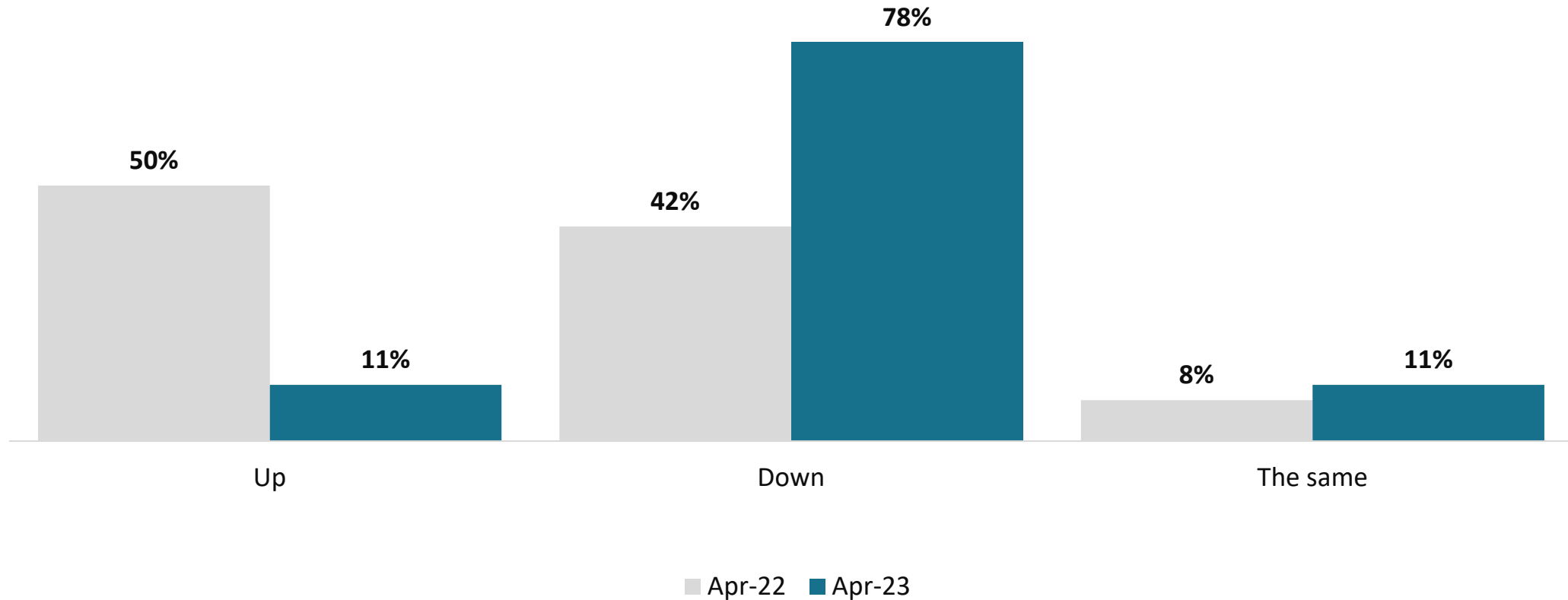
CYTD 2023 VISITOR ORIGIN MARKETS

Region	CYTD 2022		CYTD 2023		Percent Change (Δ%)	
	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	191,700	16.7%	240,700	23.3%	25.6%	39.4%
Southeast	113,600	9.9%	83,800	8.1%	- 26.2%	- 18.1%
Northeast	299,400	26.1%	216,800	21.0%	- 27.6%	- 19.6%
Midwest	377,600	32.9%	319,500	30.9%	- 15.4%	- 6.0%
West	59,600	5.2%	46,100	4.5%	- 22.7%	- 14.1%
Canada	31,700	2.8%	53,700	5.2%	69.4%	88.1%
Europe	45,900	4.0%	41,000	4.0%	- 10.7%	- 0.8%
C/S America	11,000	1.0%	18,900	1.8%	71.8%	90.8%
Other	17,400	1.5%	13,300	1.3%	- 23.6%	- 15.1%
Total	1,147,900	100.0%	1,033,800	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**

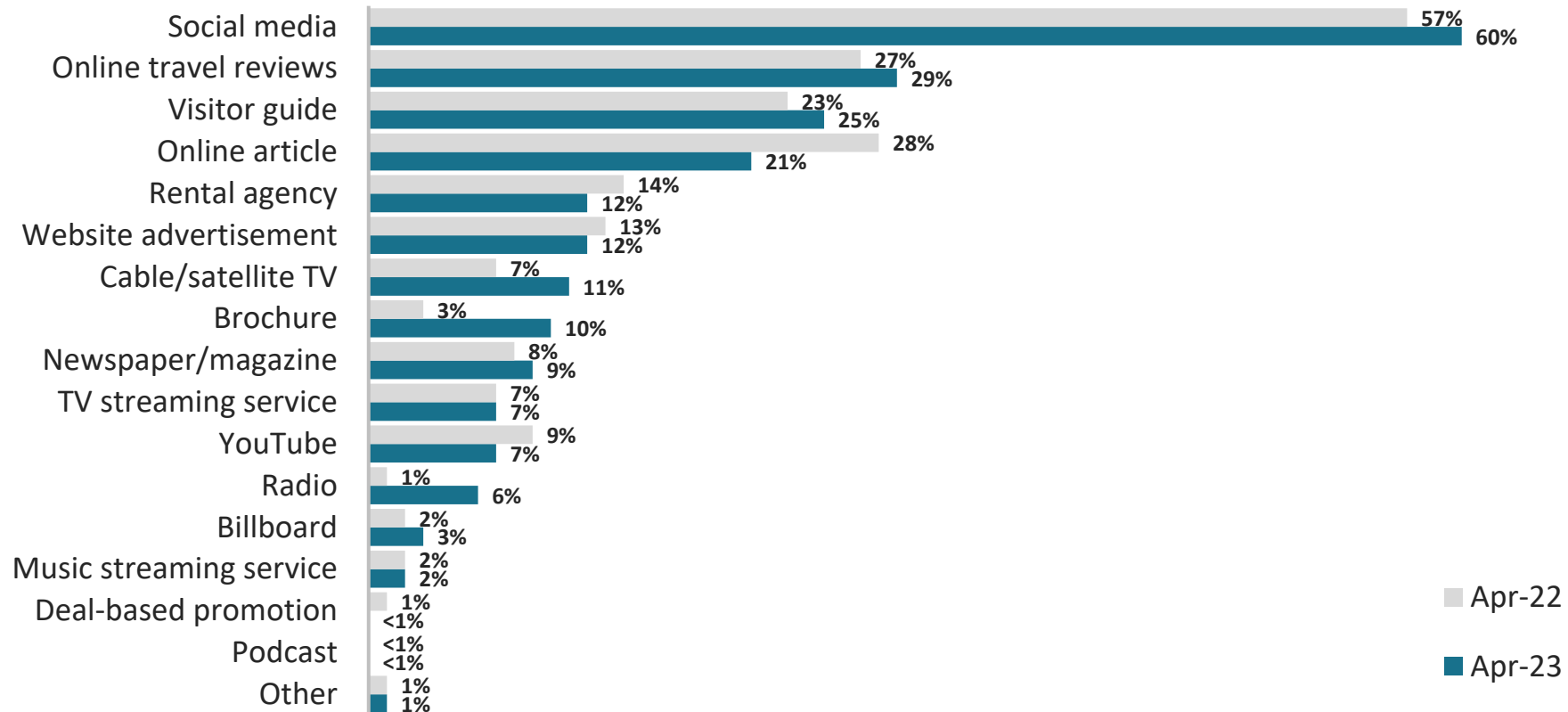
**Post-Trip
Evaluation**

**Economic
Impact on
Destination**

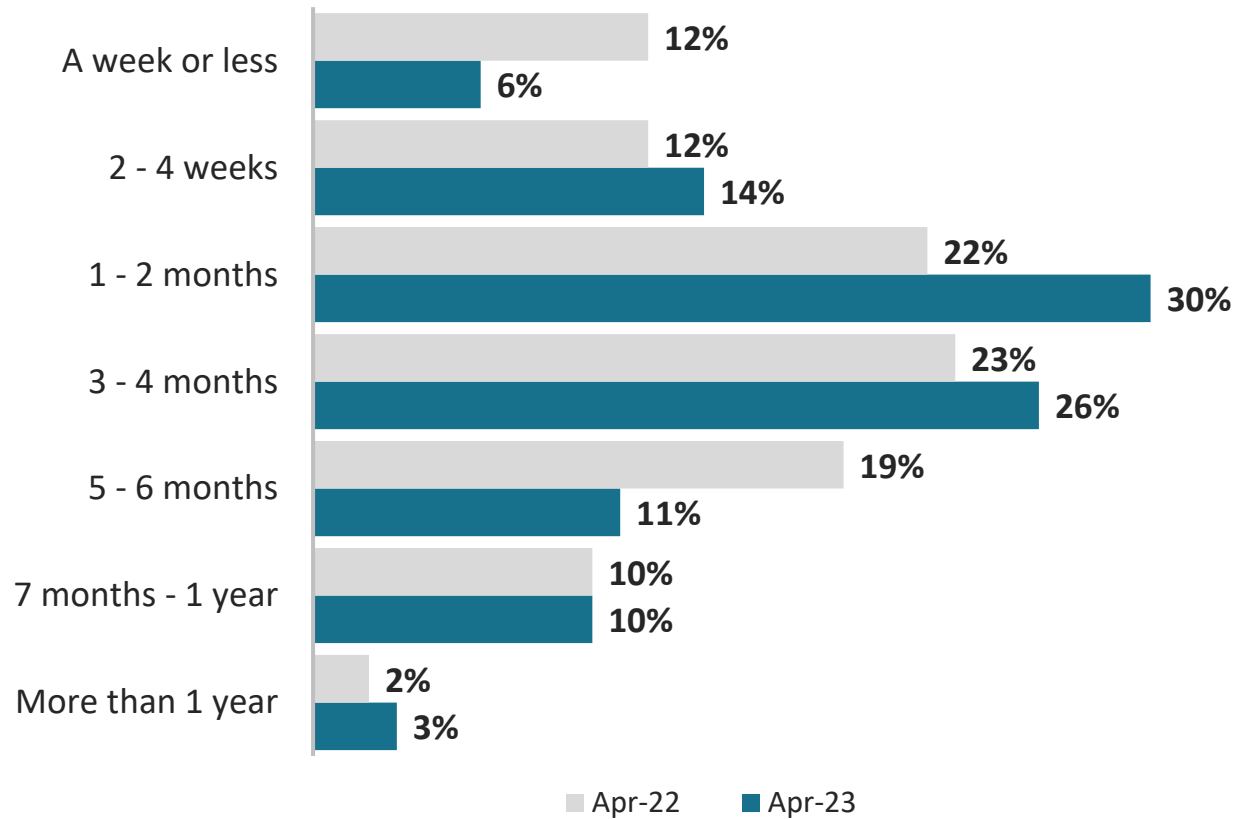
EXPOSURE TO ADVERTISING



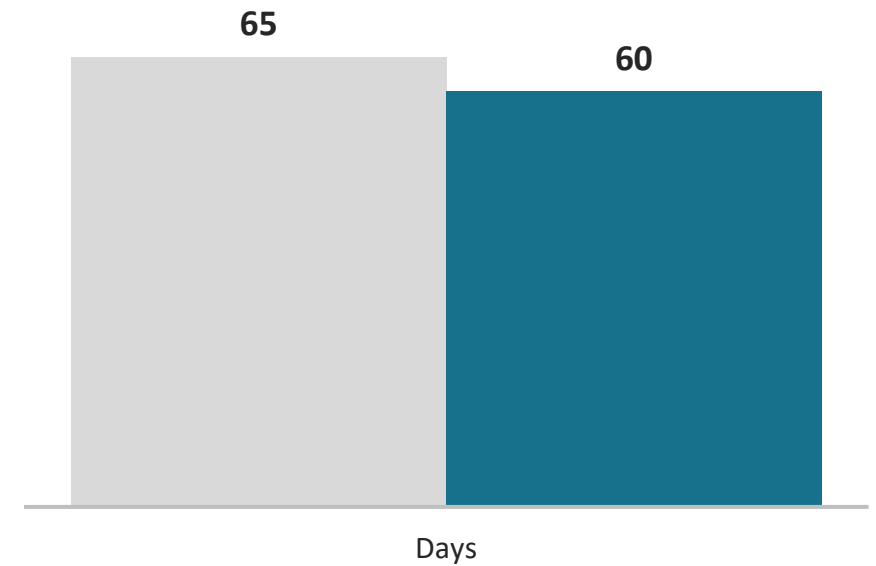
Base: 31% who saw/read/heard ads



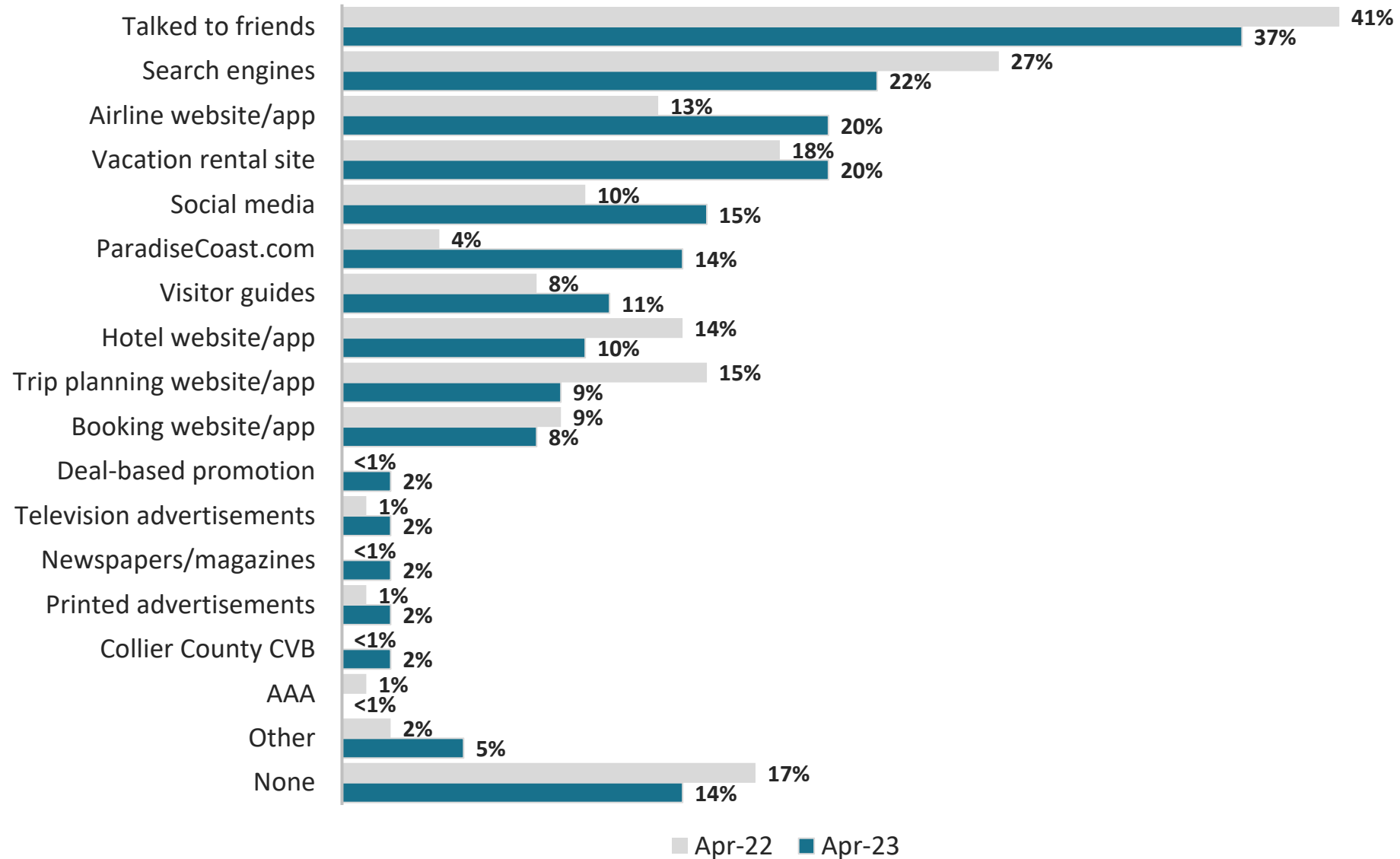
TRIP PLANNING CYCLE



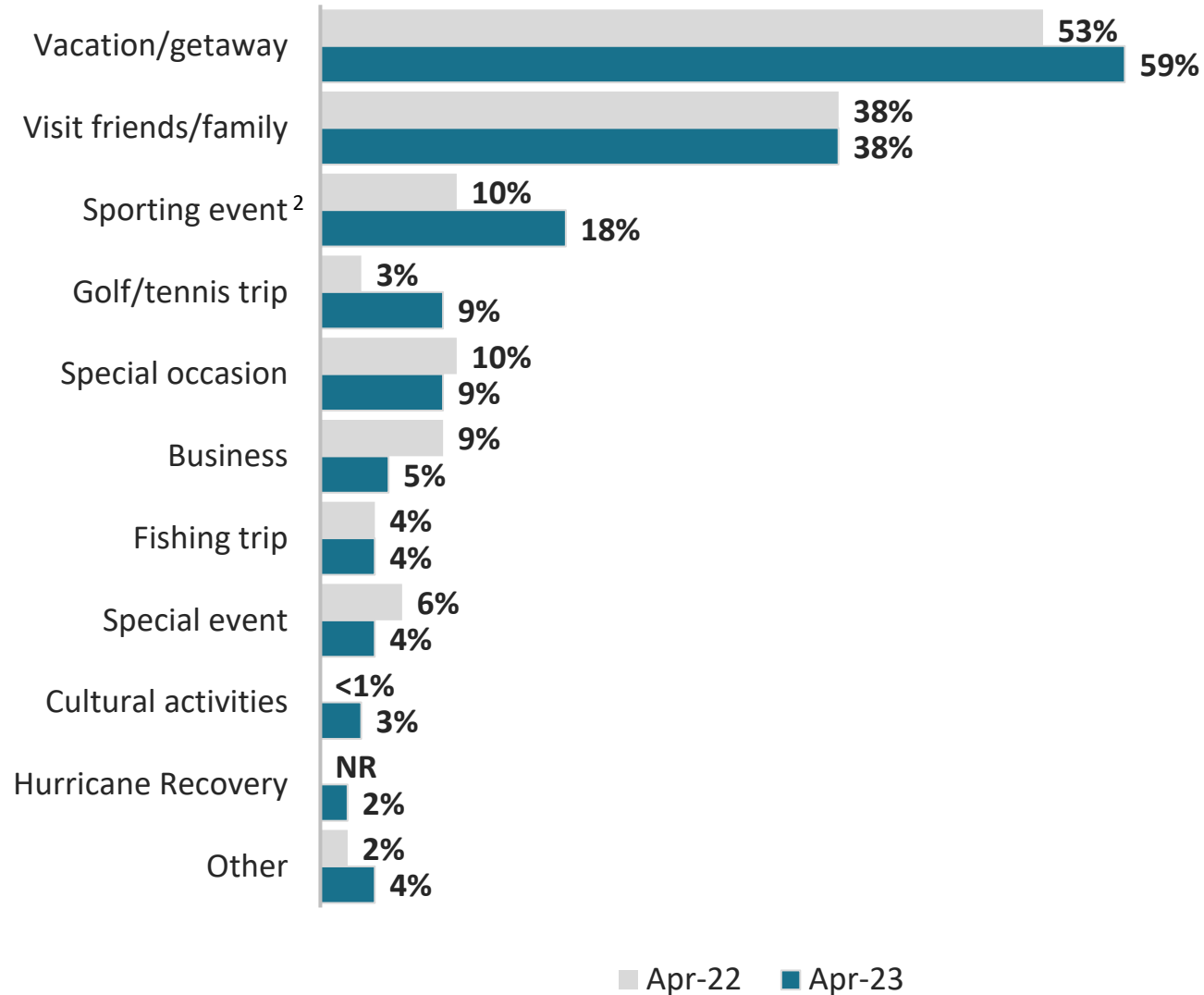
Median Trip Planning Time



TRIP PLANNING SOURCES



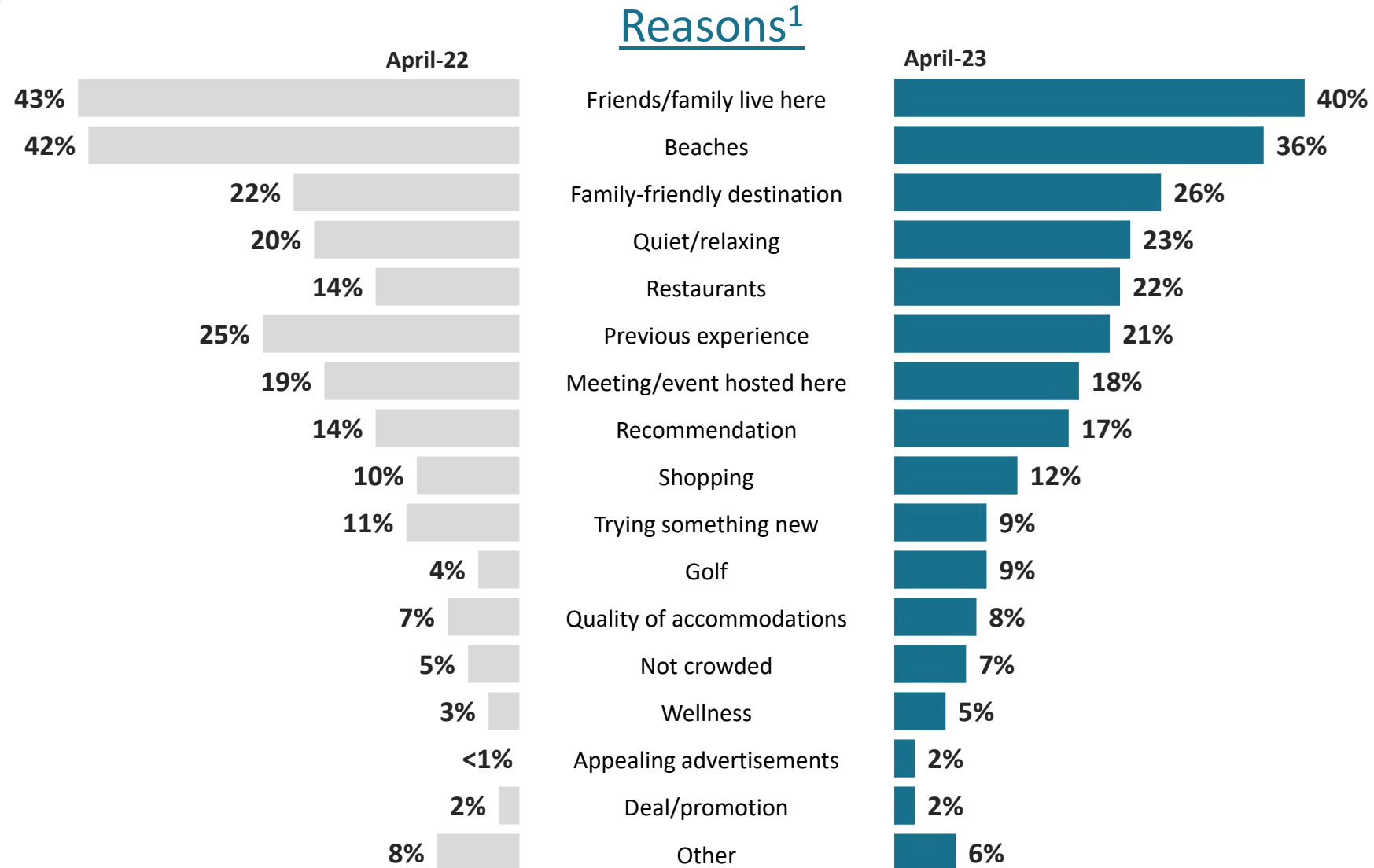
REASONS FOR VISITING¹



¹ Multiple responses permitted.

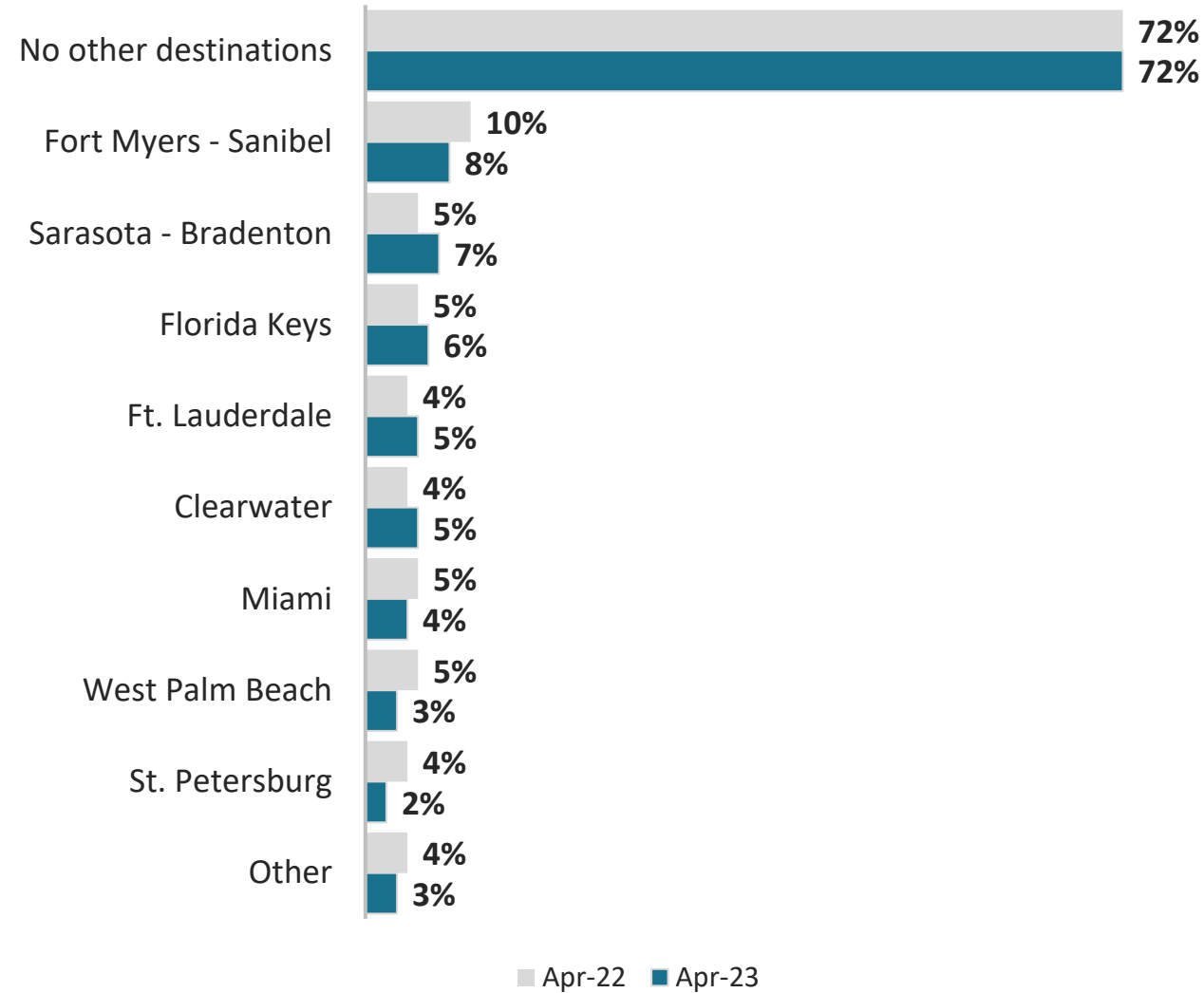
² The Minto US Open Pickleball Championships took place in April of 2022 and 2023, causing the elevated levels of "sporting event" as the main reason for visiting.

REASONS FOR CHOOSING AREA



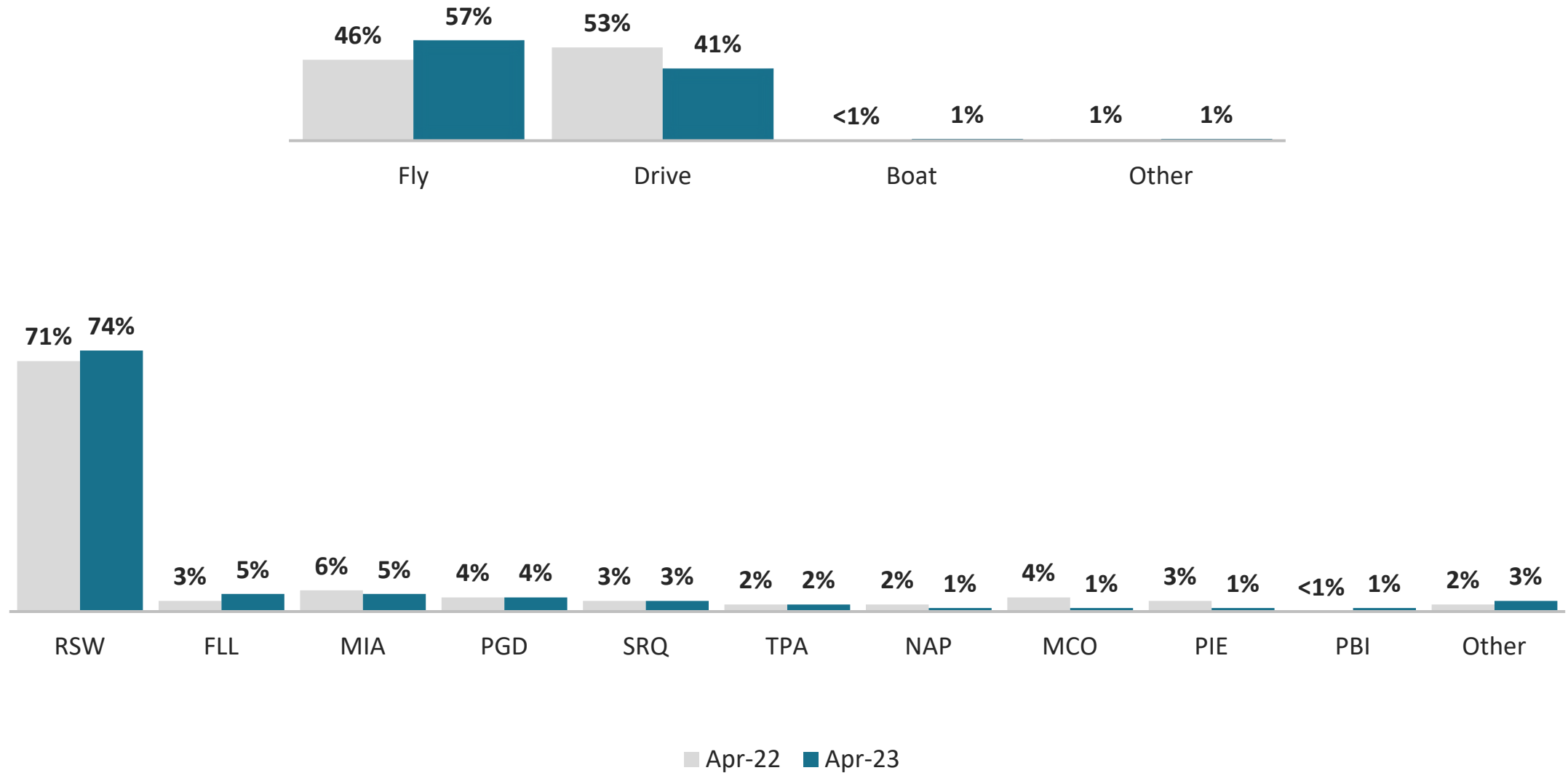
¹Multiple responses permitted.

OTHER DESTINATIONS CONSIDERED¹



¹ Multiple responses permitted.

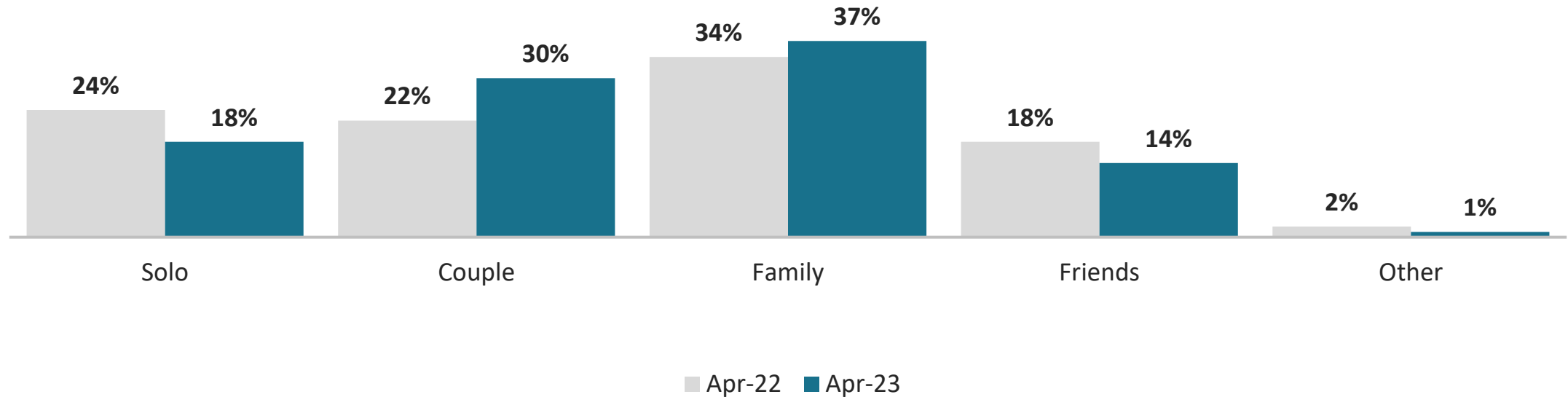
TRANSPORTATION METHODS



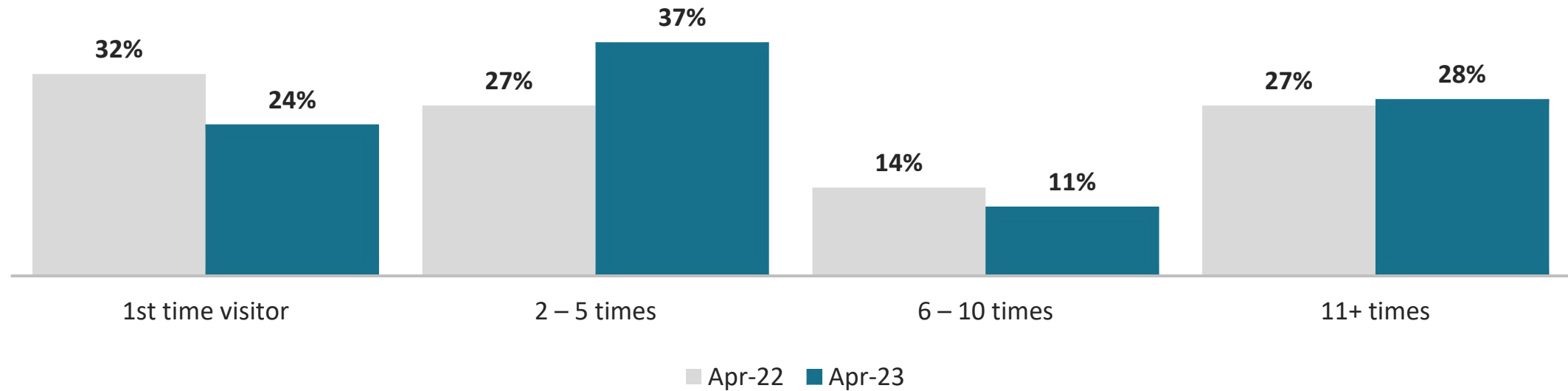
VISITOR JOURNEY: TRAVEL PARTY PROFILE



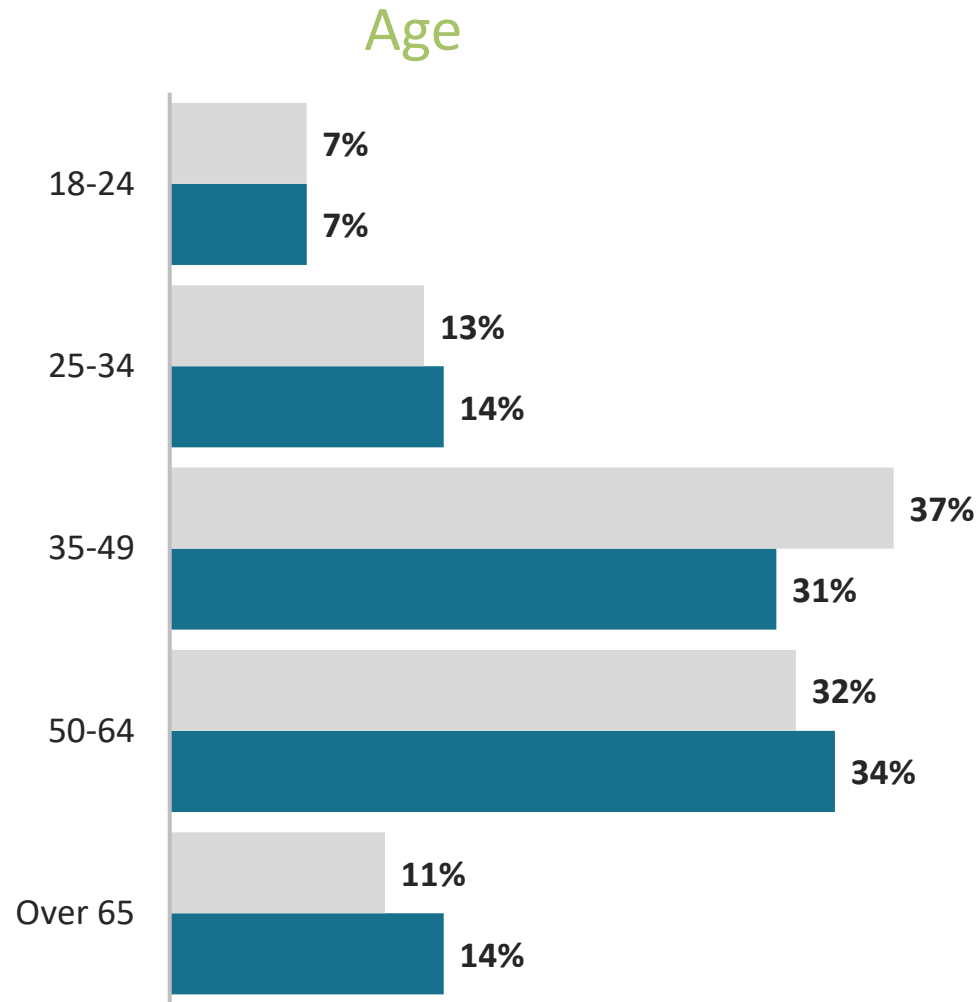
TRAVEL PARTY COMPOSITION



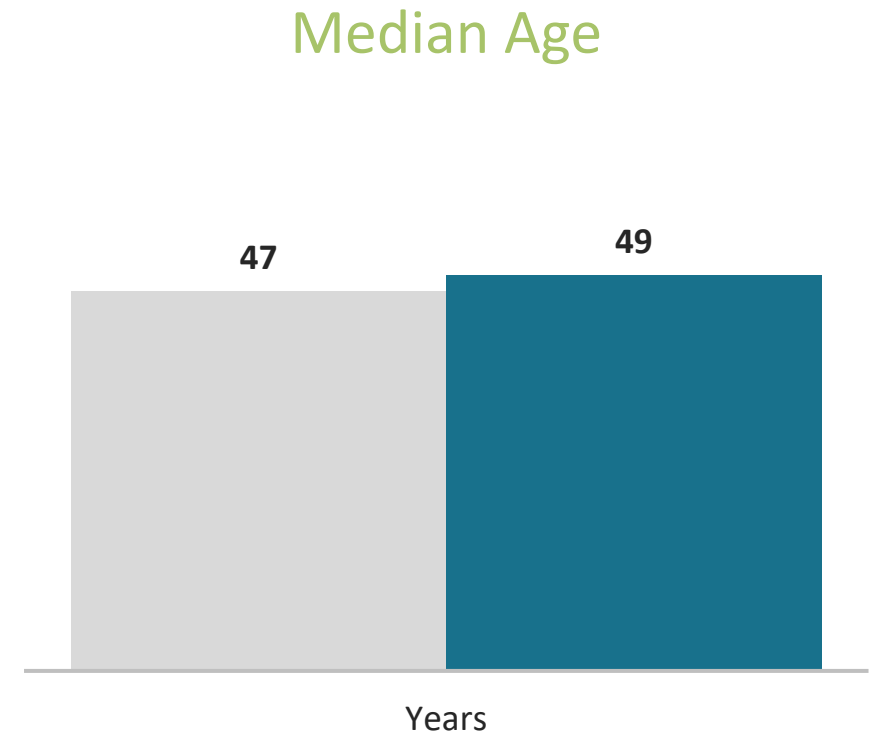
PREVIOUS VISITS



VISITOR AGES

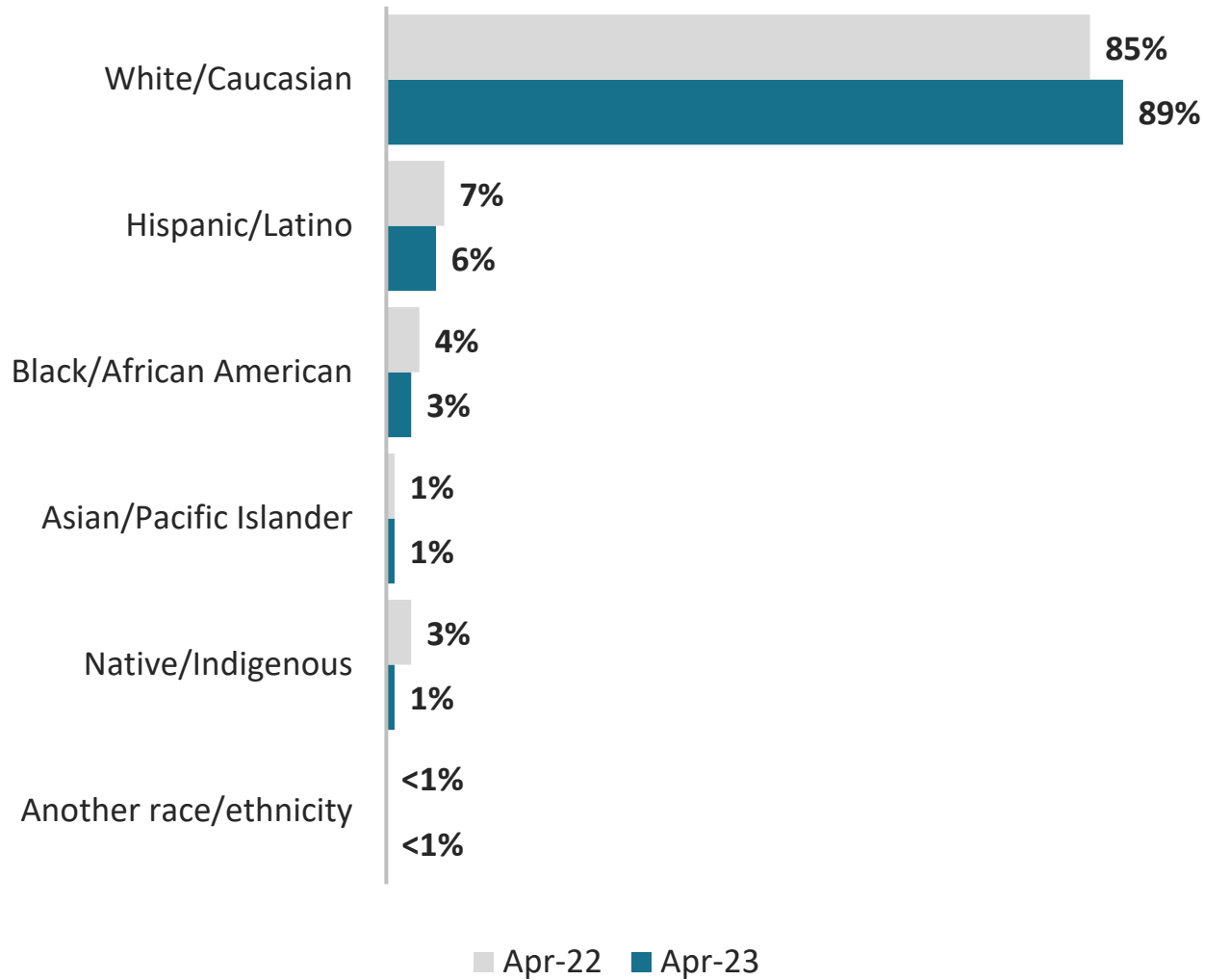


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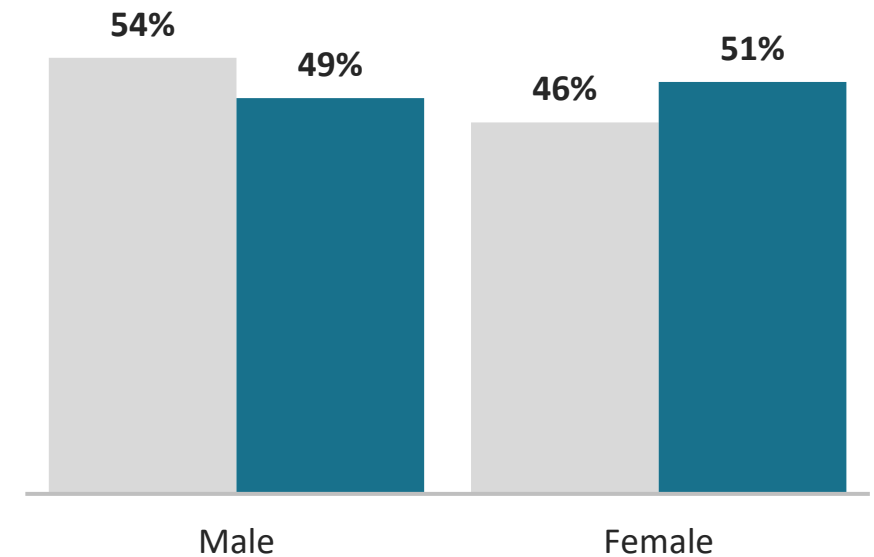


VISITOR RACE & GENDER

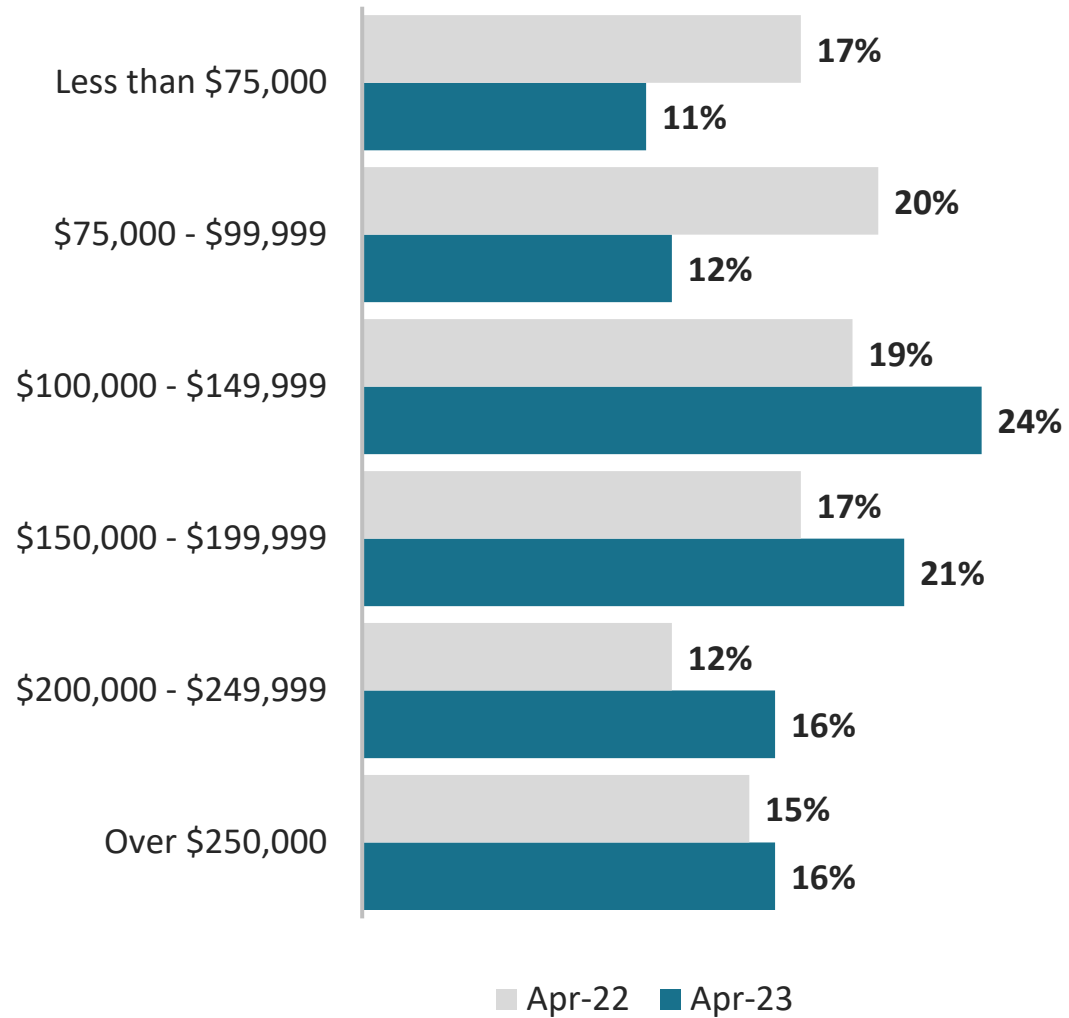
Race



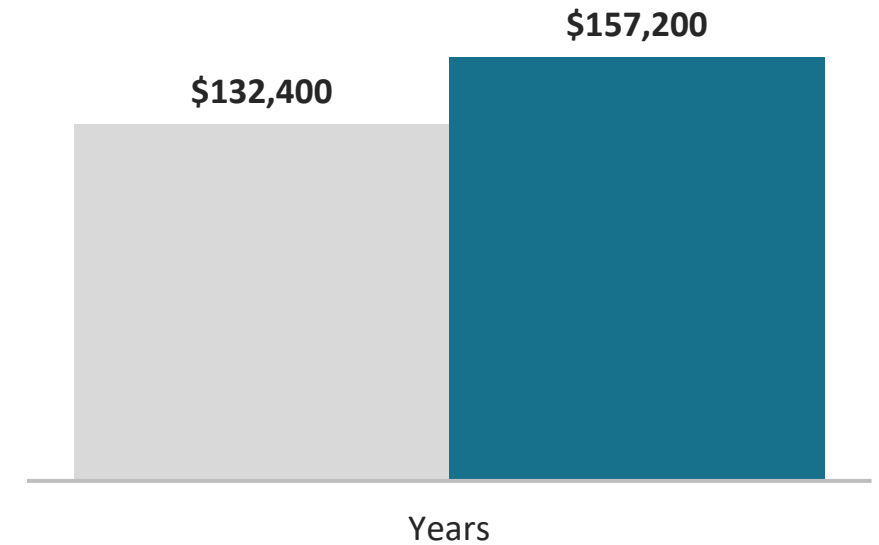
Gender



Income



Median Household Income



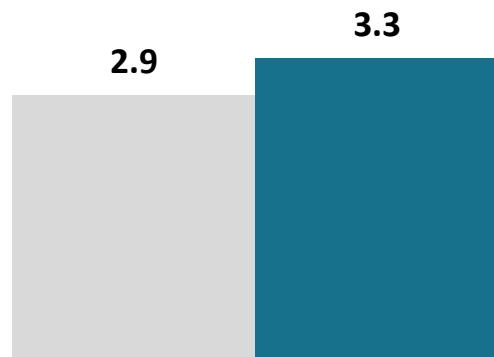
VISITOR JOURNEY: TRIP EXPERIENCE



TRIP CHARACTERISTICS

TRAVEL PARTY SIZE

3.3



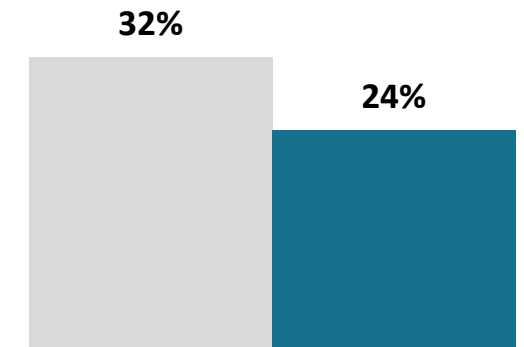
NIGHTS STAYED

7.6



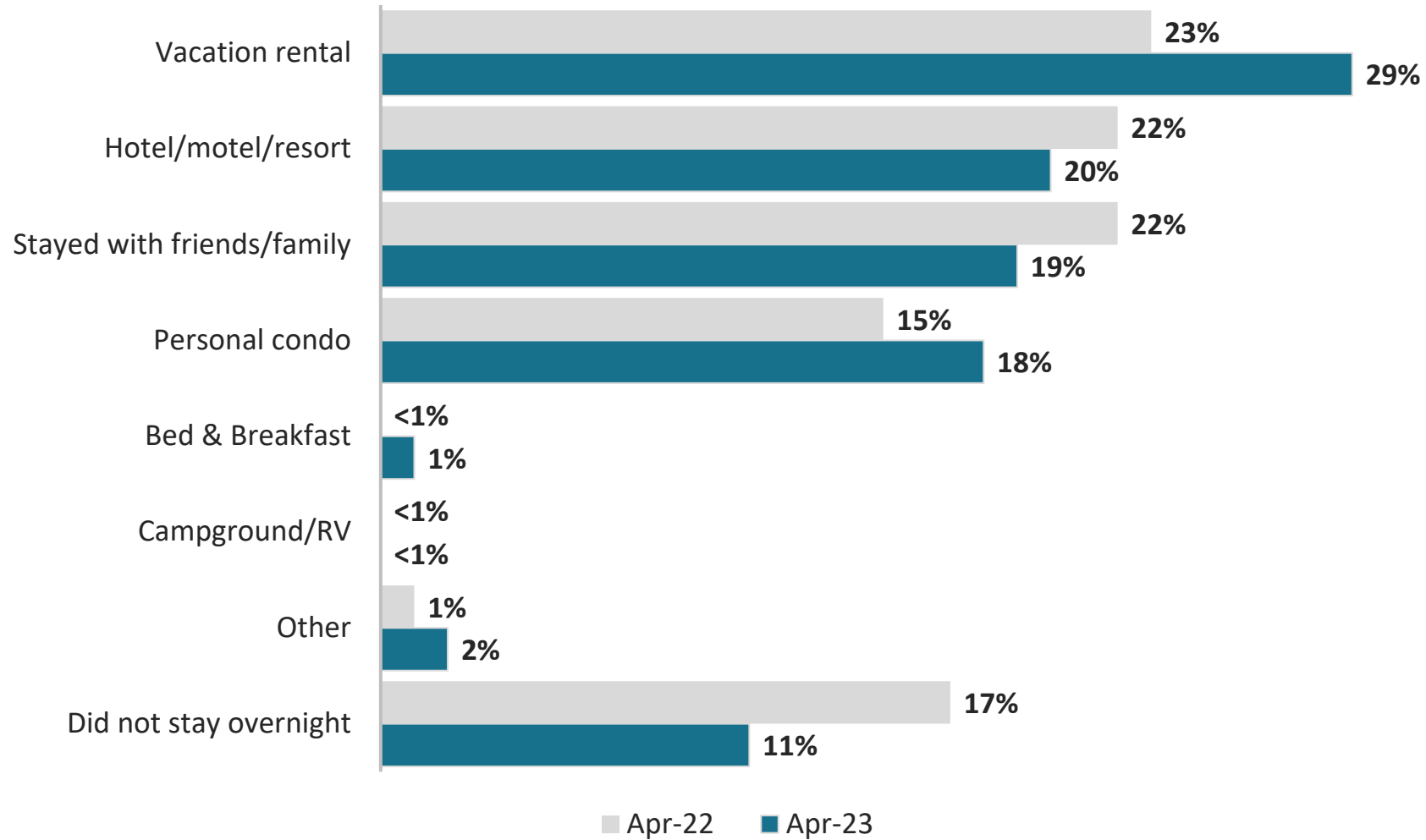
1ST TIME VISITORS

24%

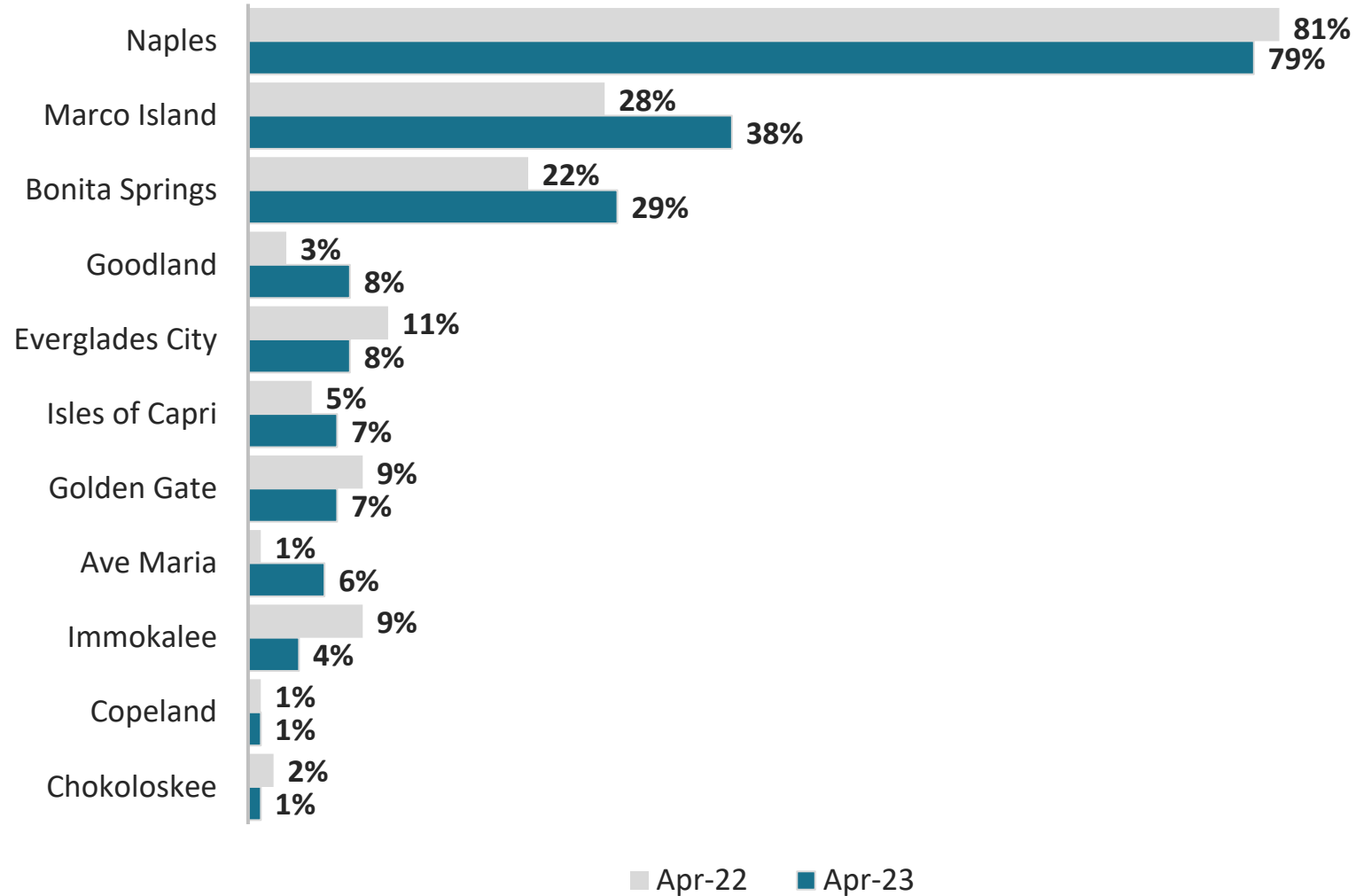


■ Apr-22 ■ Apr-23

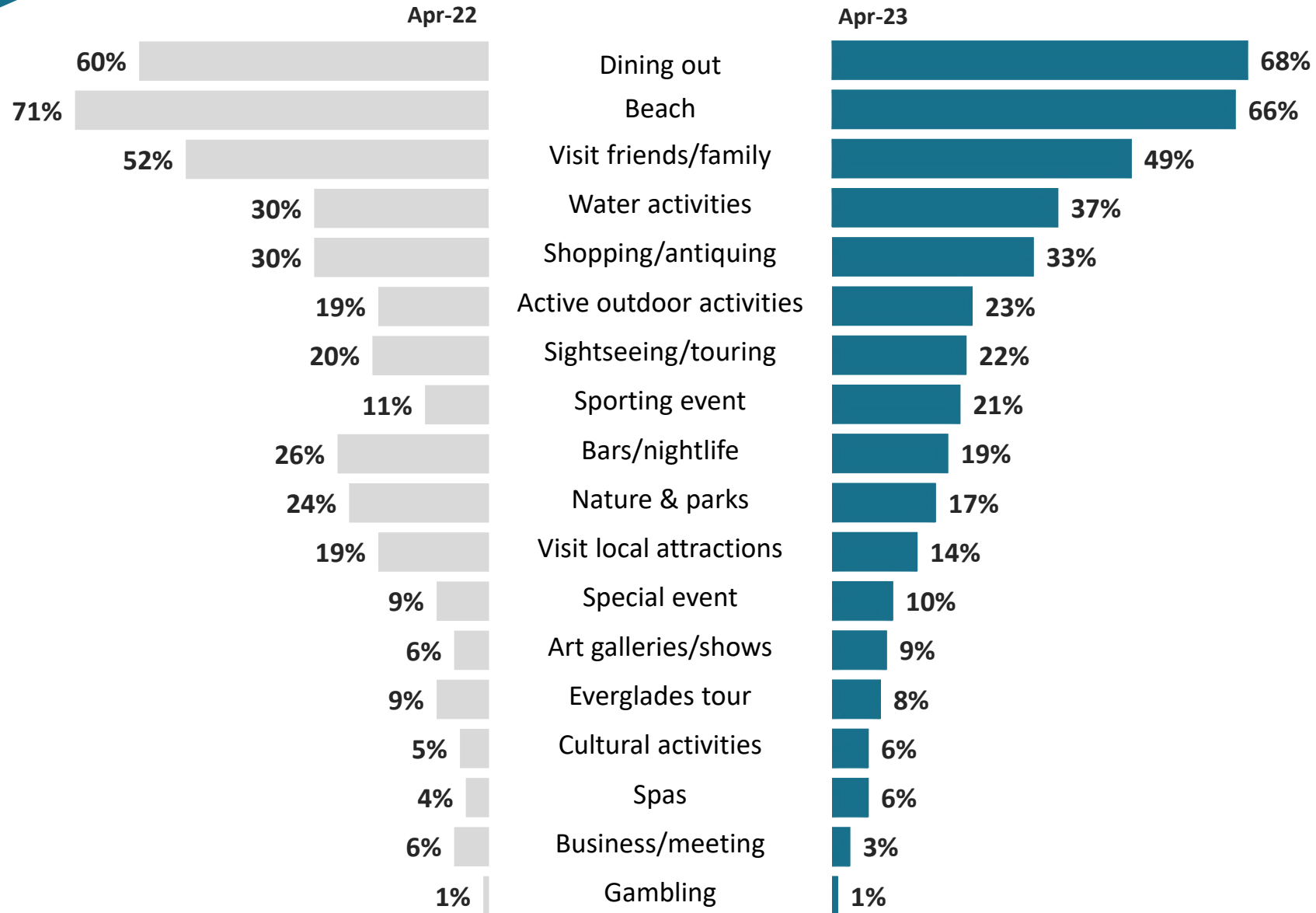
TYPE OF ACCOMMODATIONS



AREAS VISITED

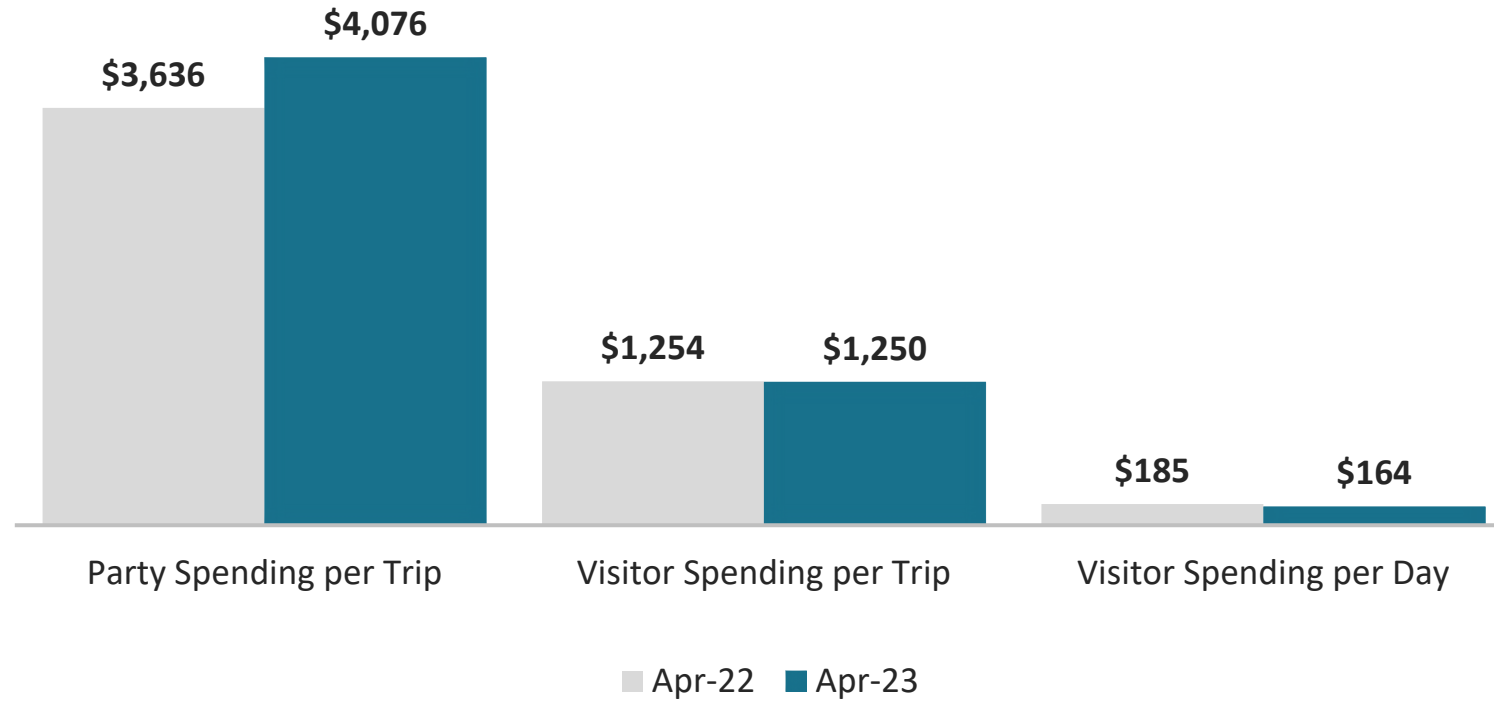


TRIP ACTIVITIES



¹ Multiple responses permitted.

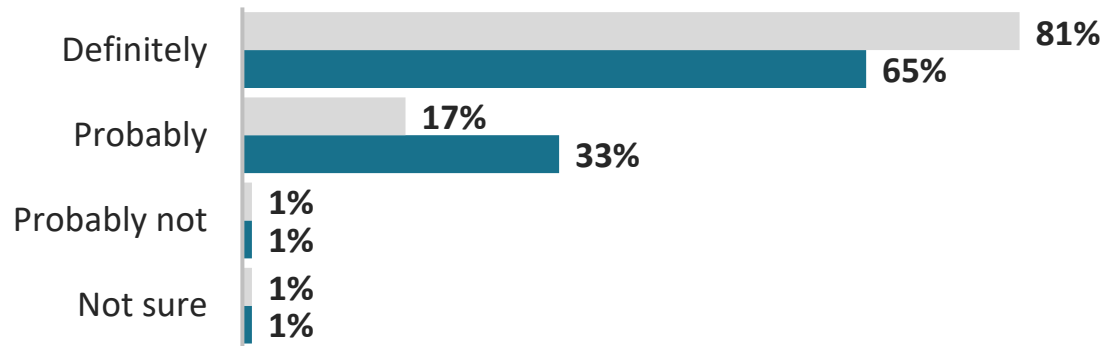
VISITOR SPENDING



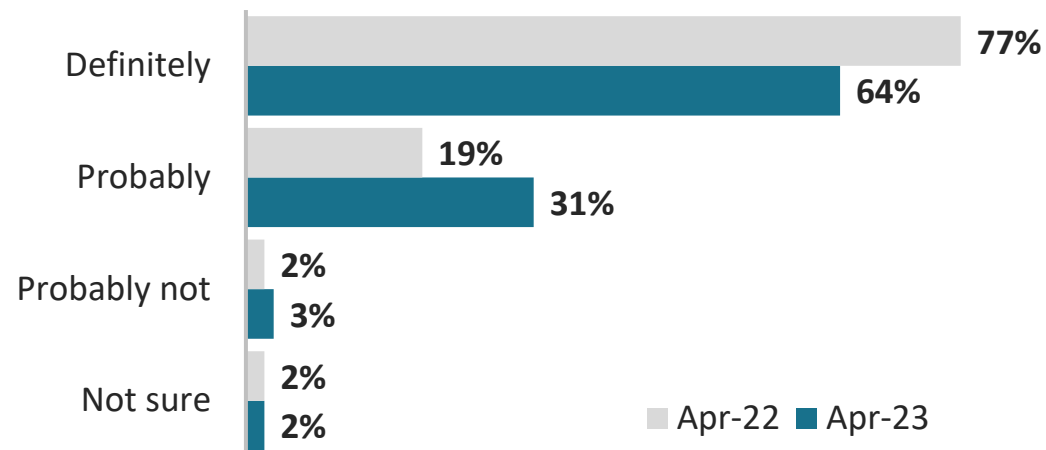
VISITOR JOURNEY: POST-TRIP EVALUATION



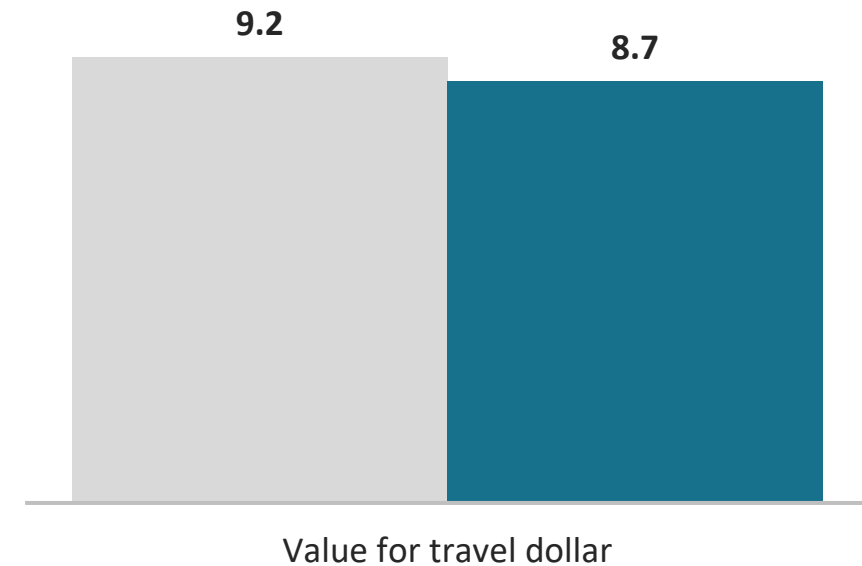
Will recommend the Naples area?



Will return to the Naples area?



VALUE FOR TRAVEL DOLLAR*



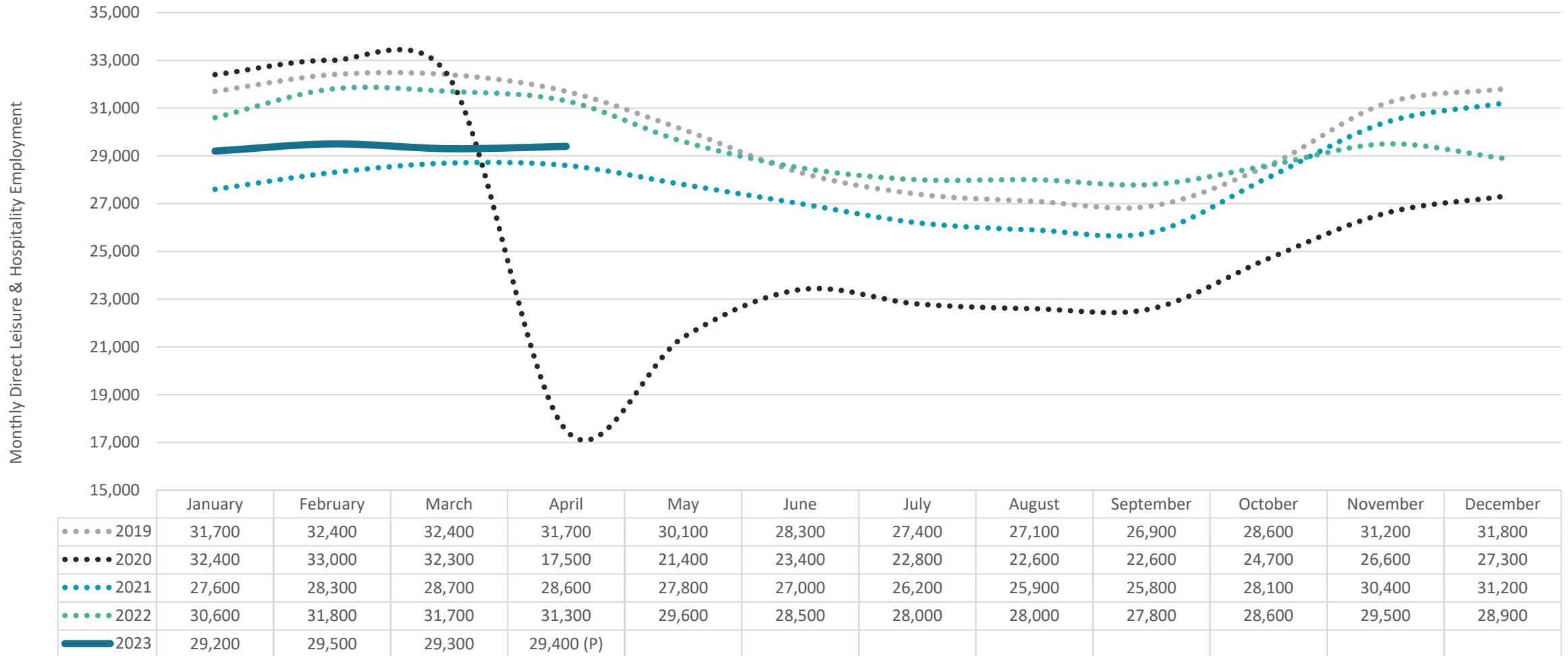
* 10-point scale where 10 is "excellent" and 1 is "poor".

INDUSTRY DATA



LEISURE & HOSPITALTY EMPLOYMENT

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

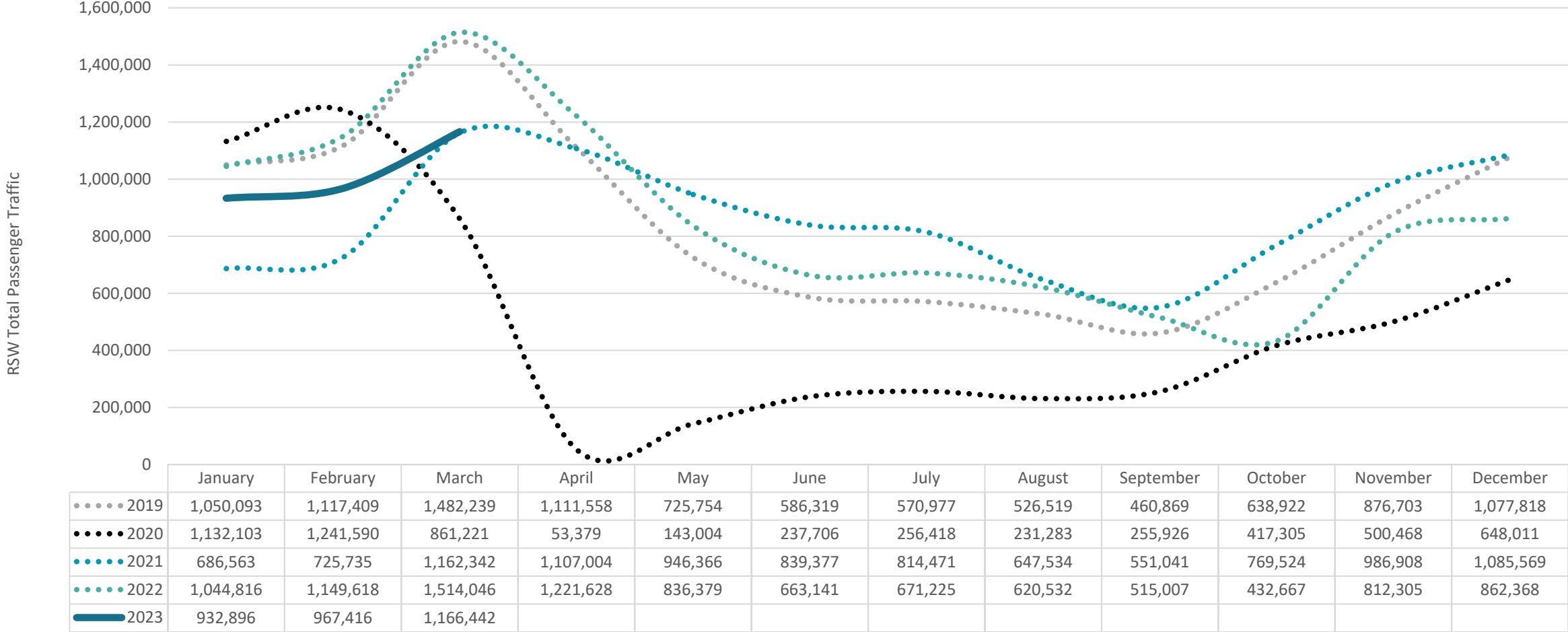


¹ SOURCE: Current Employment Statistic Program (CES), Collier County Leisure and Hospitality Sector, not seasonally adjusted.

(P) Preliminary.

RSW PASSENGER TRAFFIC

Southwest Florida International Airport (RSW) Passenger Traffic¹



¹ SOURCE: Lee County Port Authority Monthly Statistics.

LICENSED TRANSIENT RENTAL UNITS

April 2023 Licensed Transient Rental Units ¹				
	Hotel	Motel	Vacation Rental	Total
Naples	4,452	1,265	2,656	8,373
Marco Island	1,275	115	1,838	3,228
Golden Gate	0	150	0	150
Everglades City	38	36	15	89
Immokalee	0	70	3	73
Bonita Springs	0	5	30	35
Chokoloskee	0	13	2	15
Goodland	0	5	8	13
Ave Maria	0	0	4	4
Ochopee	0	0	1	1
Total	5,765	1,659	4,557	11,981²

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

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

DESTINATION COMPARISONS



OCCUPANCY COMPARISONS

	Occupancy Rate (%)				Δ% from April 2019				Δ% from April 2022			
	Trans	Group	Cont	Total	Trans	Group	Cont	Total	Trans	Group	Cont	Total
Naples	54.5%	17.6%	0.0%	72.1%	+ 14.0%	- 23.0%	- 92.8%	+ 1.9%	+ 0.5%	- 8.5%	- 81.0%	- 1.9%
Miami	58.8%	12.7%	3.9%	75.3%	+ 0.6%	- 30.9%	+ 2.5%	- 6.4%	- 4.2%	- 18.4%	- 12.7%	- 7.4%
Florida Keys	71.7%	10.4%	0.3%	82.5%	+ 0.8%	+ 7.9%	- 25.0%	+ 1.5%	- 2.9%	- 3.2%	- 41.0%	- 3.2%
Fort Myers	57.2%	12.1%	5.0%	74.2%	- 0.3%	- 21.8%	+ 78.4%	- 1.8%	- 2.1%	- 0.1%	- 16.9%	- 2.9%
Sarasota	59.1%	13.7%	1.1%	73.9%	+ 8.9%	- 18.1%	+ 24.7%	+ 2.8%	- 5.7%	+ 27.0%	+ 23.0%	- 0.6%
Clearwater	66.8%	11.9%	0.0%	78.7%	+ 3.3%	- 16.8%	- 100.0%	- 0.5%	- 3.1%	- 3.7%	0.0%	- 3.2%
St. Petersburg	59.7%	15.0%	0.7%	75.4%	+ 0.3%	- 11.4%	+ 55.8%	- 1.9%	+ 0.5%	+ 2.5%	- 41.2%	+ 0.2%
Palm Beach	53.7%	17.7%	2.0%	73.4%	+ 5.9%	- 23.2%	- 7.2%	- 3.3%	+ 0.8%	- 13.1%	+ 25.2%	- 2.5%
Ft. Lauderdale	60.4%	13.1%	3.1%	76.5%	+ 4.1%	- 21.2%	- 23.7%	- 2.7%	- 1.8%	- 11.6%	+ 5.7%	- 3.4%

¹Metrics provided by STR.

ROOM RATE COMPARISONS

	Average Daily Rate (\$)				Δ% from April 2019				Δ% from April 2022			
	Trans	Group	Cont	Total	Trans	Group	Cont	Total	Trans	Group	Cont	Total
Naples	\$344.00	\$296.70	\$271.21	\$332.44	+ 15.3%	+ 20.9%	+ 84.2%	+ 18.3%	- 0.2%	+ 9.3%	+ 2.8%	- 17.2%
Miami	\$249.08	\$273.32	\$112.25	\$246.12	+ 21.6%	+ 27.5%	+ 14.2%	+ 21.9%	- 16.2%	+ 0.7%	+ 4.7%	- 12.7%
Florida Keys	\$424.14	\$417.68	\$371.52	\$423.12	+ 42.7%	+ 44.0%	+ 99.9%	+ 43.0%	- 14.1%	+ 9.0%	+ 18.8%	- 11.6%
Fort Myers	\$169.84	\$190.78	\$122.55	\$170.11	- 3.7%	+ 39.6%	+ 58.5%	+ 3.4%	- 30.5%	+ 13.9%	+ 21.4%	- 23.0%
Sarasota	\$233.38	\$183.19	\$103.86	\$222.22	+ 47.1%	+ 45.5%	+ 65.0%	+ 48.2%	- 0.6%	+ 5.3%	+ 46.4%	- 0.9%
Clearwater	\$256.09	\$198.99	\$0.00	\$247.43	+ 37.2%	+ 32.1%	- 100.0%	+ 37.4%	- 4.9%	+ 14.1%	0.0%	- 2.9%
St. Petersburg	\$254.26	\$192.86	\$119.31	\$240.79	+ 36.5%	+ 29.4%	- 6.5%	+ 35.5%	- 3.1%	+ 11.5%	+ 1.4%	- 0.8%
Palm Beach	\$297.13	\$284.29	\$119.53	\$289.15	+ 35.6%	+ 34.6%	+ 10.1%	+ 35.4%	- 6.2%	+ 13.7%	- 6.4%	- 1.8%
Ft. Lauderdale	\$215.58	\$226.12	\$142.78	\$214.47	+ 27.0%	+ 23.2%	+ 9.6%	+ 25.6%	- 6.3%	+ 8.5%	+ 21.8%	- 3.3%

¹Metrics provided by STR.

ROOM REVENUE COMPARISONS

	Revenue per Available Room (\$)				Δ% from April 2019				Δ% from April 2022			
	Trans	Group	Cont	Total	Trans	Group	Cont	Total	Trans	Group	Cont	Total
Naples	\$187.50	\$52.25	\$0.02	\$239.76	+ 31.4%	- 6.9%	- 86.8%	+ 20.5%	- 22.7%	+ 0.0%	- 80.5%	- 18.7%
Miami	\$146.36	\$34.61	\$4.35	\$185.31	+ 22.4%	- 11.9%	+ 17.0%	+ 14.0%	- 19.7%	- 17.8%	- 8.6%	- 19.2%
Florida Keys	\$304.27	\$43.44	\$1.18	\$348.89	+ 43.9%	+ 55.5%	+ 49.8%	+ 45.2%	- 16.5%	+ 5.5%	- 29.9%	- 14.4%
Fort Myers	\$97.08	\$23.15	\$6.07	\$126.29	- 4.0%	+ 9.2%	+ 182.6%	+ 1.5%	- 31.9%	+ 13.8%	+ 0.9%	- 25.2%
Sarasota	\$138.03	\$25.10	\$1.10	\$164.23	+ 60.2%	+ 19.2%	+ 105.8%	+ 52.4%	- 6.3%	+ 33.7%	+ 80.1%	- 1.5%
Clearwater	\$171.03	\$23.76	\$0.00	\$194.78	+ 41.7%	+ 9.9%	- 100.0%	+ 36.8%	- 7.8%	+ 9.9%	+ 0.0%	- 6.0%
St. Petersburg	\$151.77	\$28.84	\$0.85	\$181.46	+ 37.0%	+ 14.6%	+ 45.7%	+ 32.9%	- 2.6%	+ 14.2%	- 40.4%	- 0.5%
Palm Beach	\$159.49	\$50.32	\$2.41	\$212.23	+ 43.6%	+ 3.3%	+ 2.2%	+ 30.9%	- 5.4%	- 1.2%	+ 17.2%	- 4.2%
Ft. Lauderdale	\$130.15	\$29.61	\$4.38	\$164.13	+ 32.2%	- 3.0%	- 16.4%	+ 22.3%	- 8.0%	- 4.1%	+ 28.8%	- 6.6%

¹Metrics provided by STR.

NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau
April 2023 Monthly Dashboard

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