NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau
August 2022 Monthly Dashboard

NAPLES · MARCO ISLAND
EVERGLADES
FLORIDA'S PARADISE COAST

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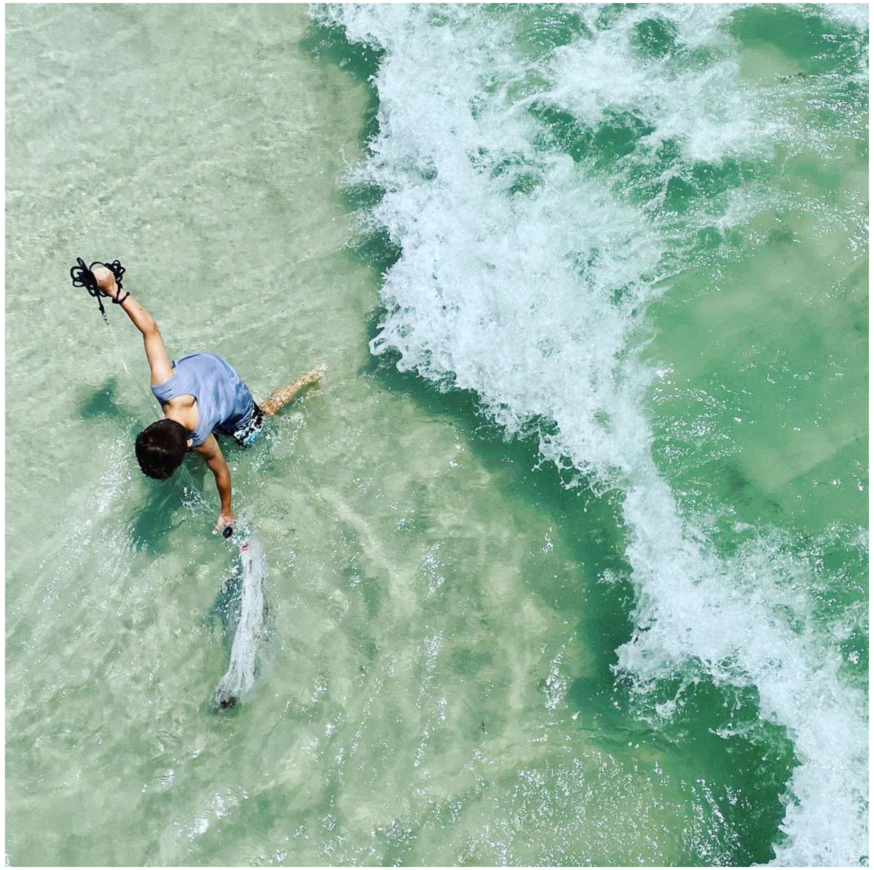
RESEARCH

MONTHLY SNAPSHOT

- Occupancy was down slightly compared to 2021, but the number of visitors increased due to more available units and a shorter average length of stay.

- In August 2022, 3 in 5 property managers said their reservations for the next three months are up from where they were this time last year, indicating increased levels of consumer optimism. However, this increase in reservations may be because in August 2021, the Delta variant of COVID-19 was surging in Florida which had a negative influence on vacation planning.

- More visitors driving to Naples, more visitors staying in hotels, more in-state visitors, and shorter trips all indicate that many people used August to squeeze in their last summer vacation of the year before school is back in full swing.



AUGUST 2022 LODGING METRICS*

NAPLES · MARCO ISLAND
EVERGLADES
FLORIDA'S PARADISE COAST

OCCUPANCY RATE

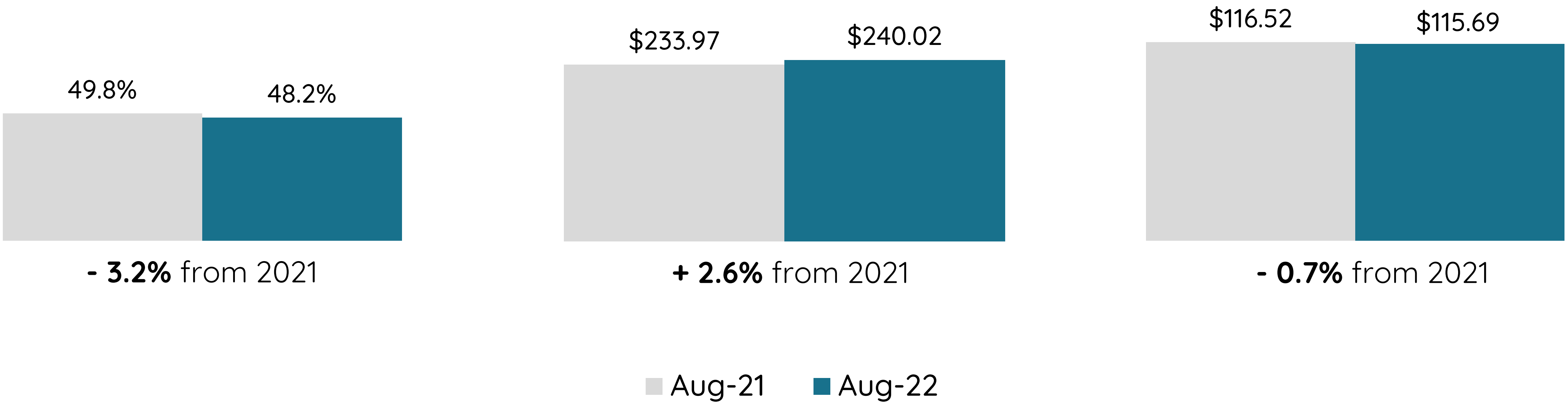
48.2%

AVERAGE DAILY RATE

$240.02

REVENUE PER AVAILABLE ROOM

$115.69



* Visitors staying in paid accommodations.

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AUGUST 2019–2022 LODGING METRICS*

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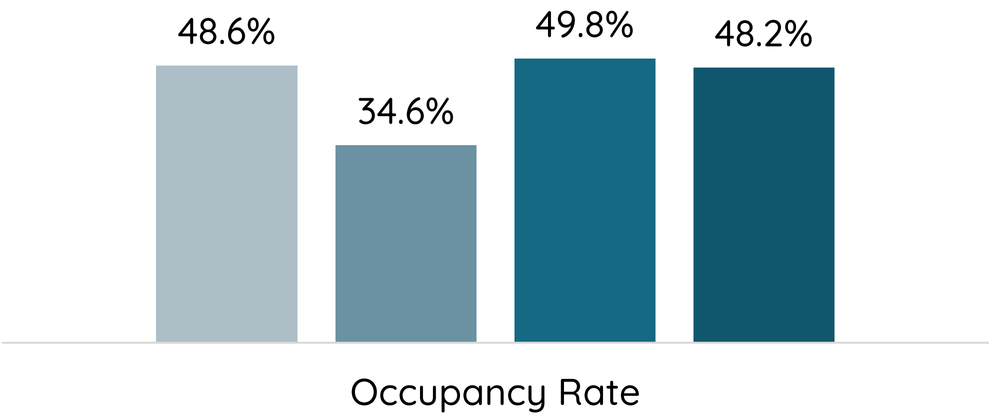
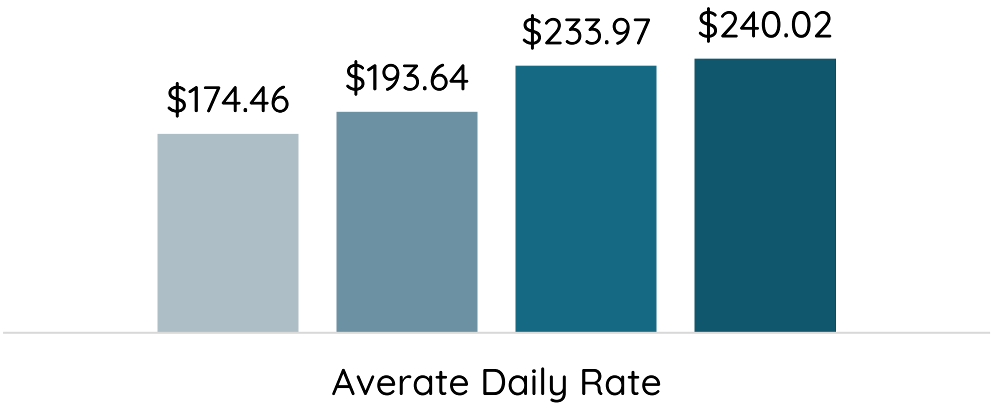
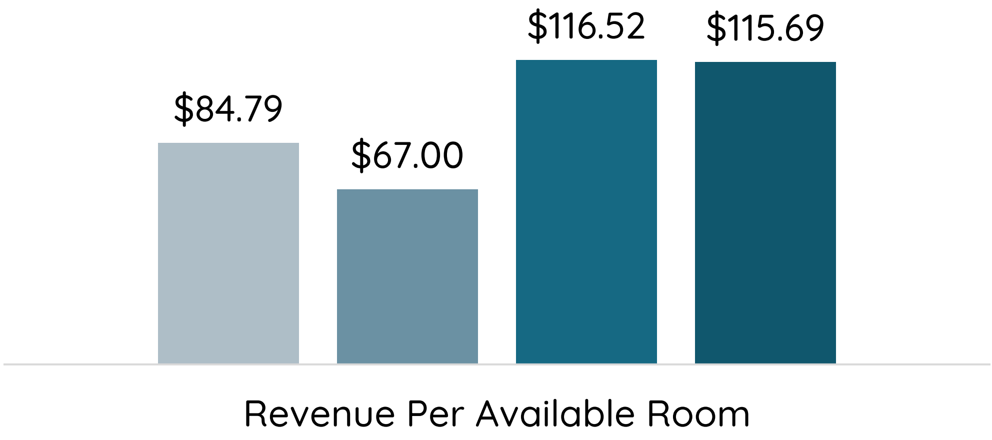
EVERGLADES
FLORIDA'S PARADISE COAST







2019 2020 2021 2022

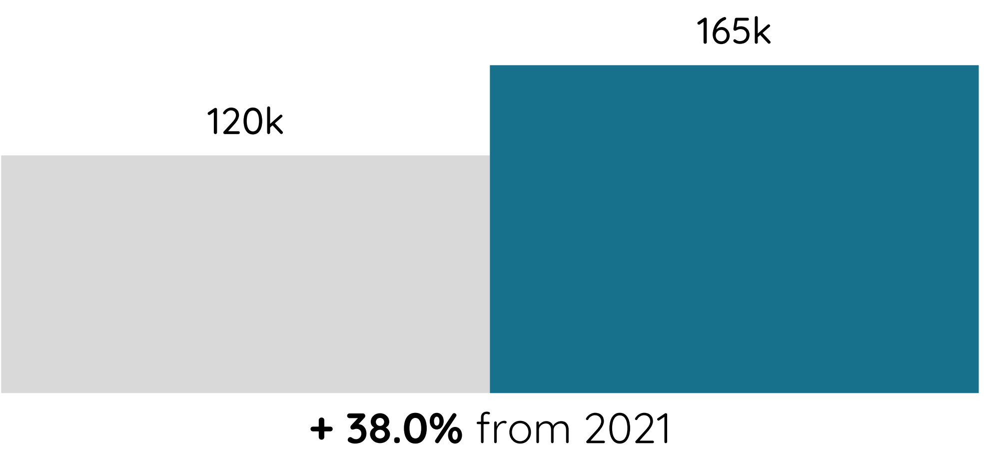
* Visitors staying in paid accommodations.

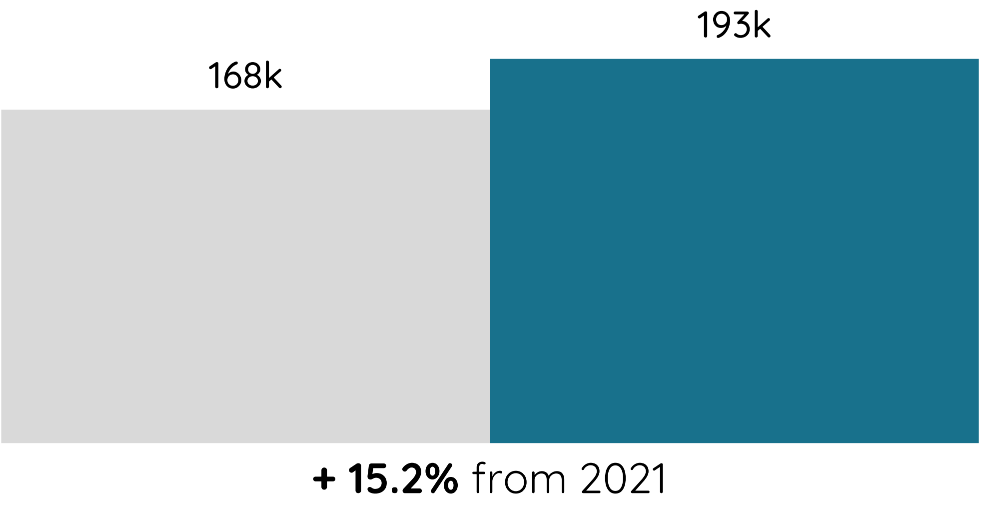
AUGUST 2022 VISITATION & ROOM NIGHTS*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

VISITORS
164,900

ROOM NIGHTS**
193,200





Aug-21 Aug-22

*Visitors staying in paid accommodations.
**More rental units available in 2022

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AUGUST 2022 SPENDING & ECONOMIC IMPACT*

NAPLES · MARCO ISLAND
EVERGLADES
FLORIDA'S PARADISE COAST

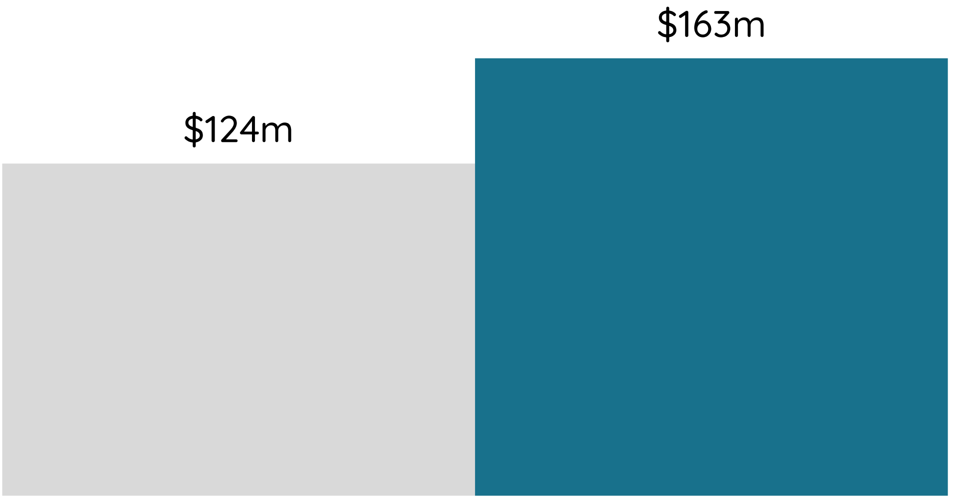
DIRECT SPENDING

$109,240,600

+ 31.6% from 2021

ECONOMIC IMPACT

$162,877,700



+ 31.6% from 2021

Aug-21 Aug-22

* Visitors staying in paid accommodations.

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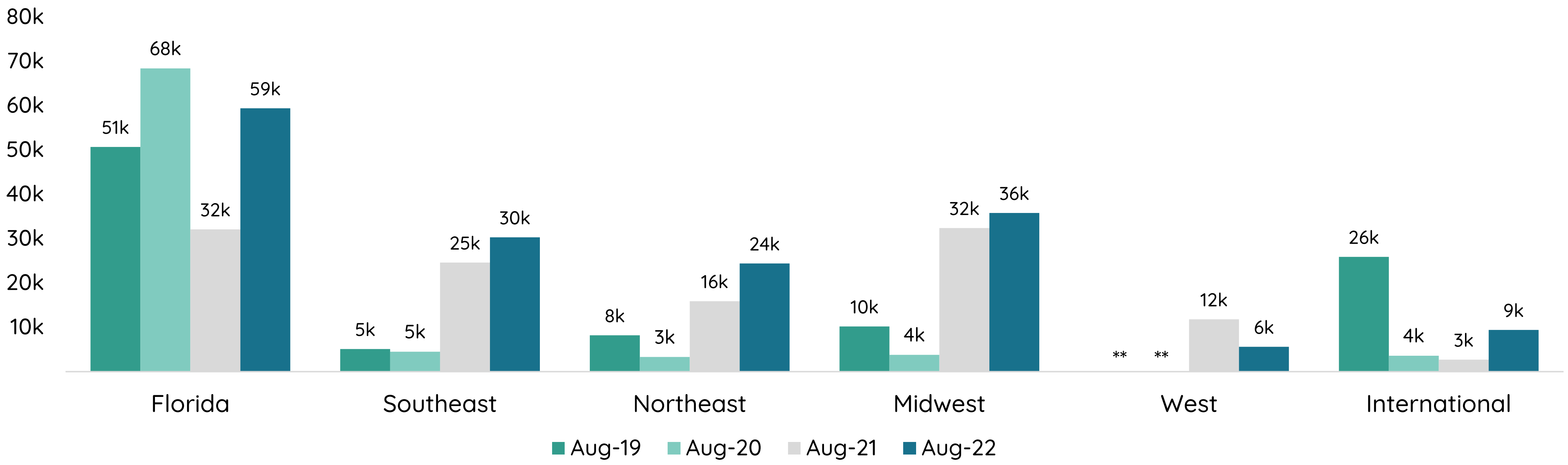
VISITOR ORIGIN*

FLORIDA VISITORS

59,400

OUT-OF-STATE VISITORS

105,500



* Visitors staying in paid accommodations.
** Visitation from western U.S. states not separated from "other" category in August 2019 and 2020.

CUMULATIVE VISITATION & ROOM NIGHTS*

NAPLES • MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

CYTD VISITORS

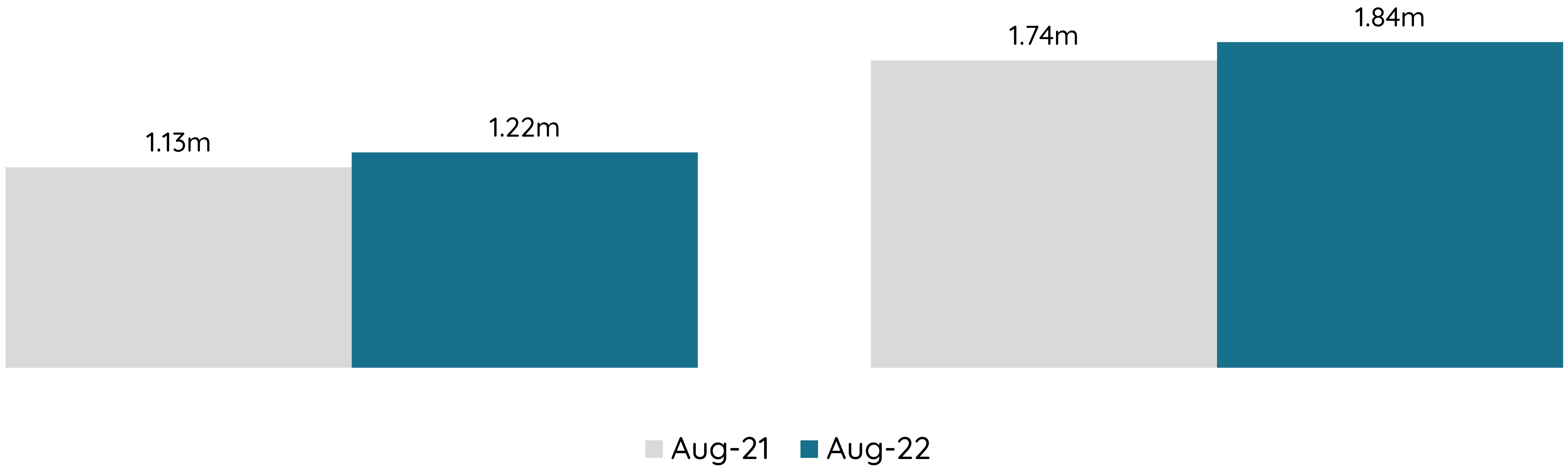
1,216,300

+ 7.4% from 2021

CYTD ROOM NIGHTS

1,838,700

+ 6.0% from 2021



* Visitors staying in paid accommodations.

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CUMULATIVE SPENDING & ECONOMIC IMPACT*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

CYTD DIRECT SPENDING

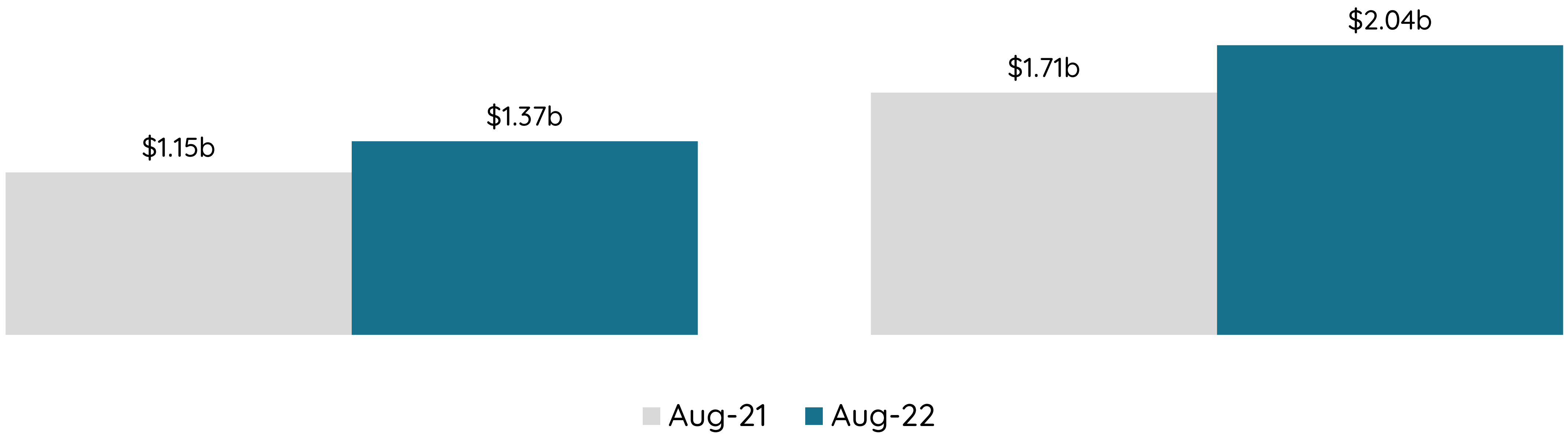
$1,367,925,300

+ 19.2% from 2021

CYTD ECONOMIC IMPACT

$2,039,576,700

+ 19.2% from 2021



* Visitors staying in paid accommodations.

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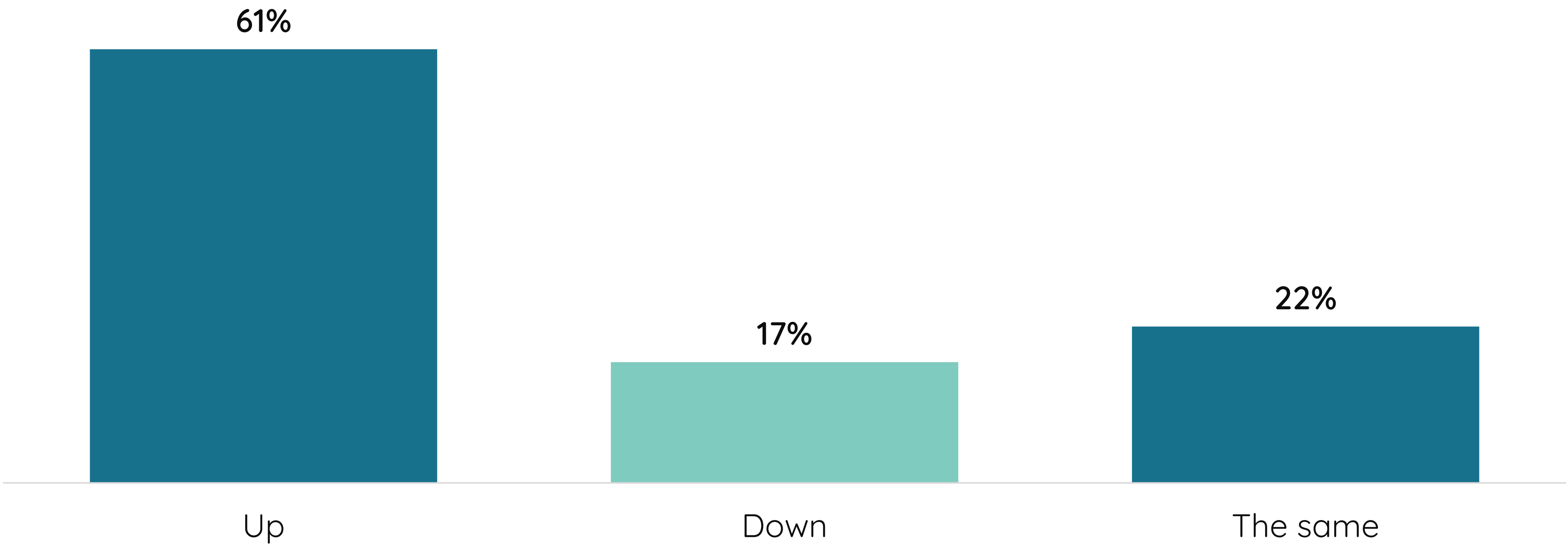
OCCUPANCY BAROMETER

NAPLES · MARCO ISLAND
EVERGLADES
FLORIDA'S PARADISE COAST

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



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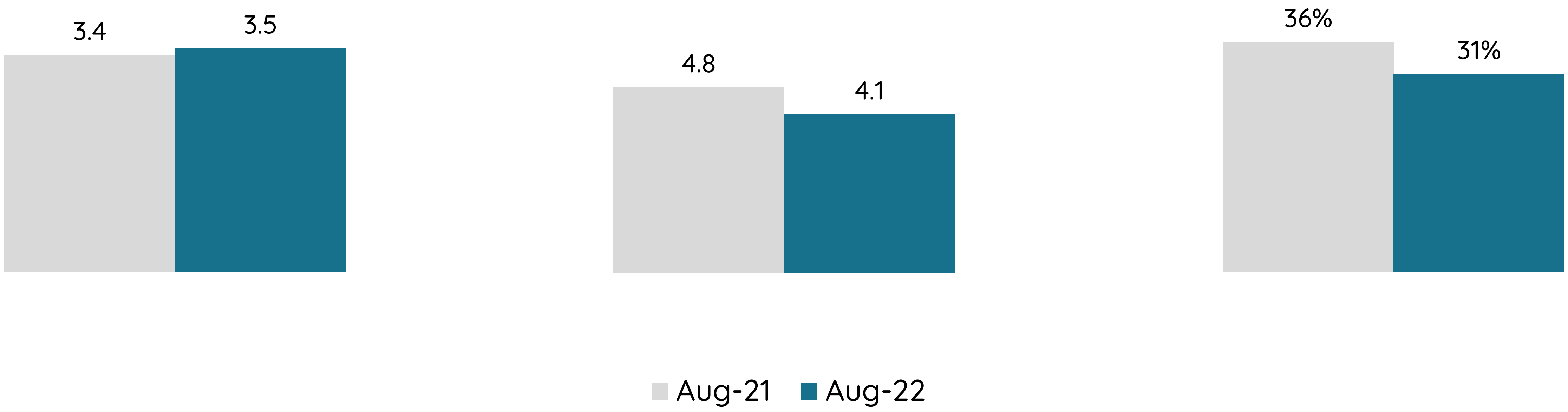
TRIP CHARACTERISTICS*

TRAVEL PARTY SIZE
3.5

NIGHTS STAYED
4.1

1ST TIME VISITORS
31%



* Visitors staying in paid accommodations.

TRIP PLANNING CYCLE*

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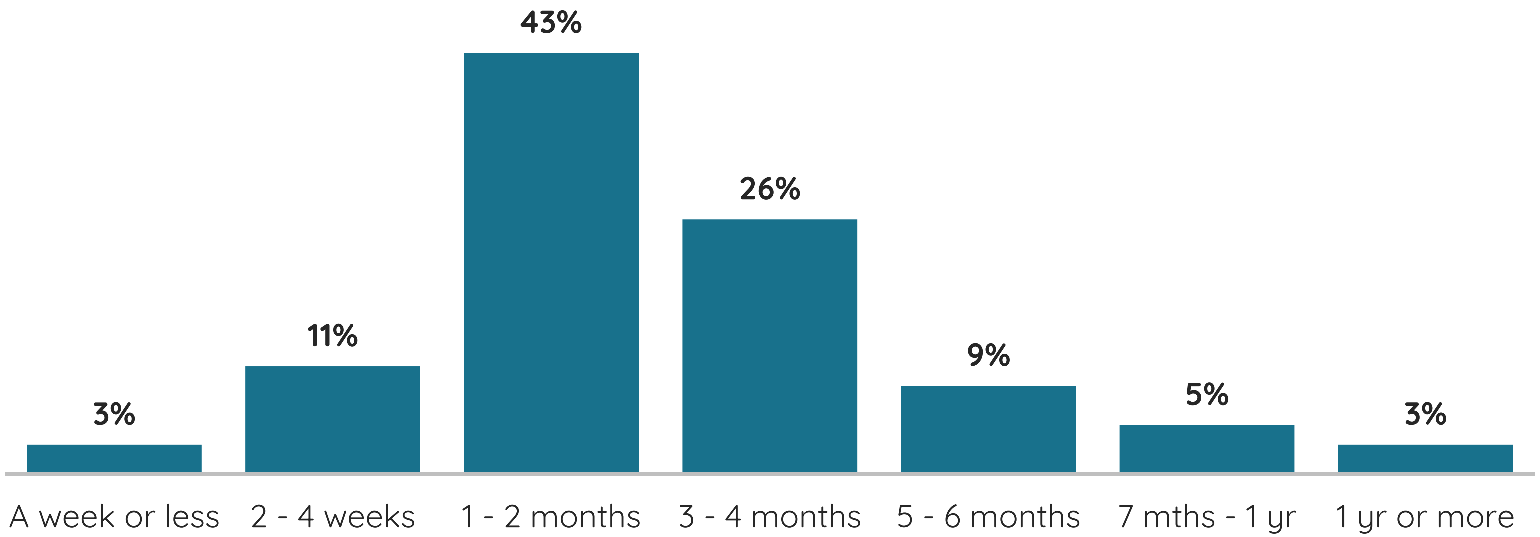
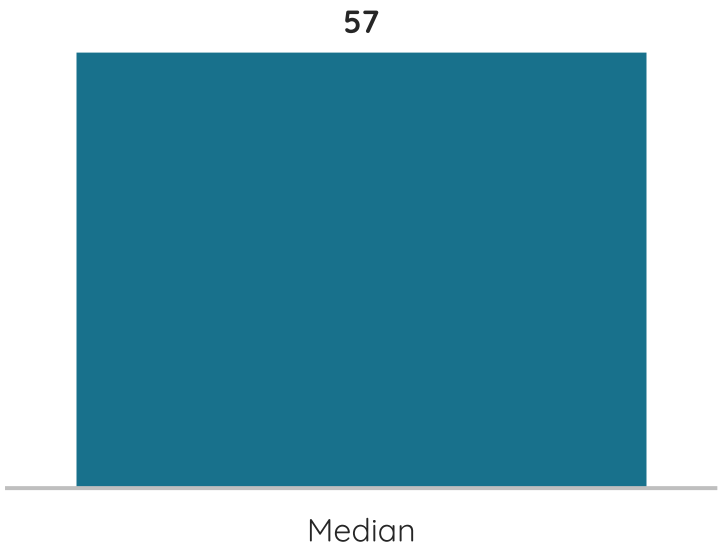
FLORIDA'S PARADISE COAST

PLANNING WINDOWS



MEDIAN PLANNING DAYS



* Visitors staying in paid accommodations.

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TRAVEL PARTIES*

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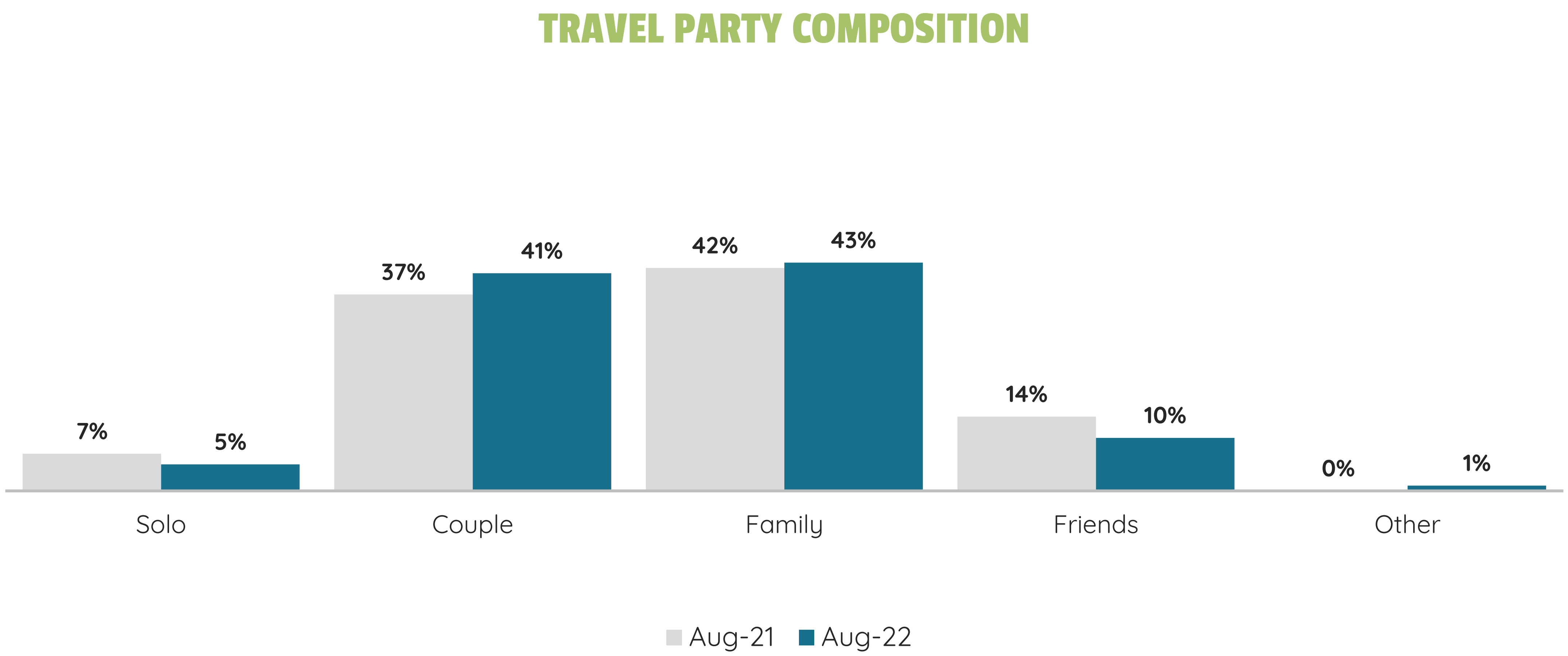
FLORIDA'S PARADISE COAST



* Visitors staying in paid accommodations.

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DESTINATIONS CONSIDERED*

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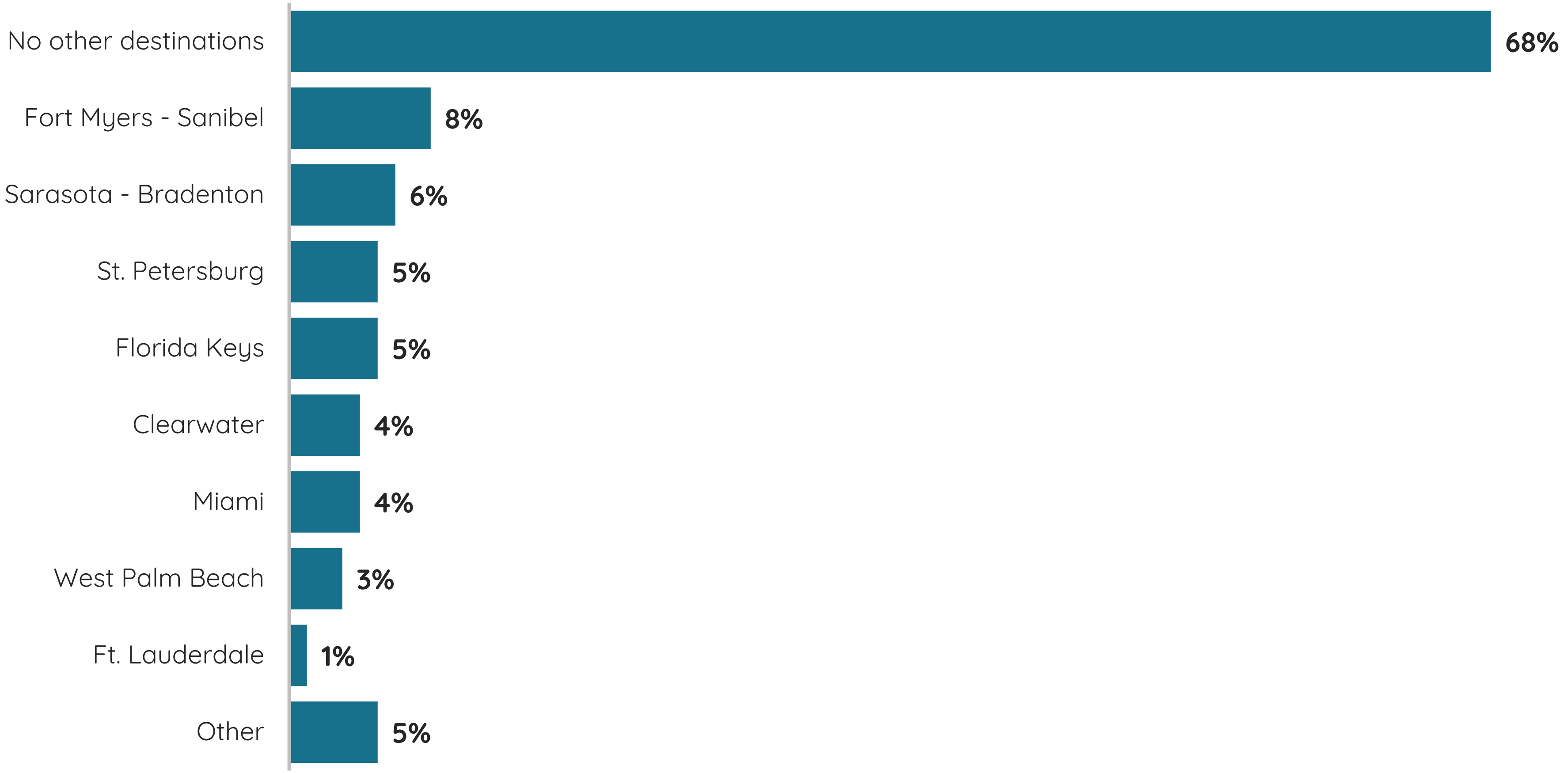
EVERGLADES
FLORIDA'S PARADISE COAST

OTHER DESTINATIONS CONSIDERED[1]



[1] Multiple responses permitted.
* Visitors staying in paid accommodations.

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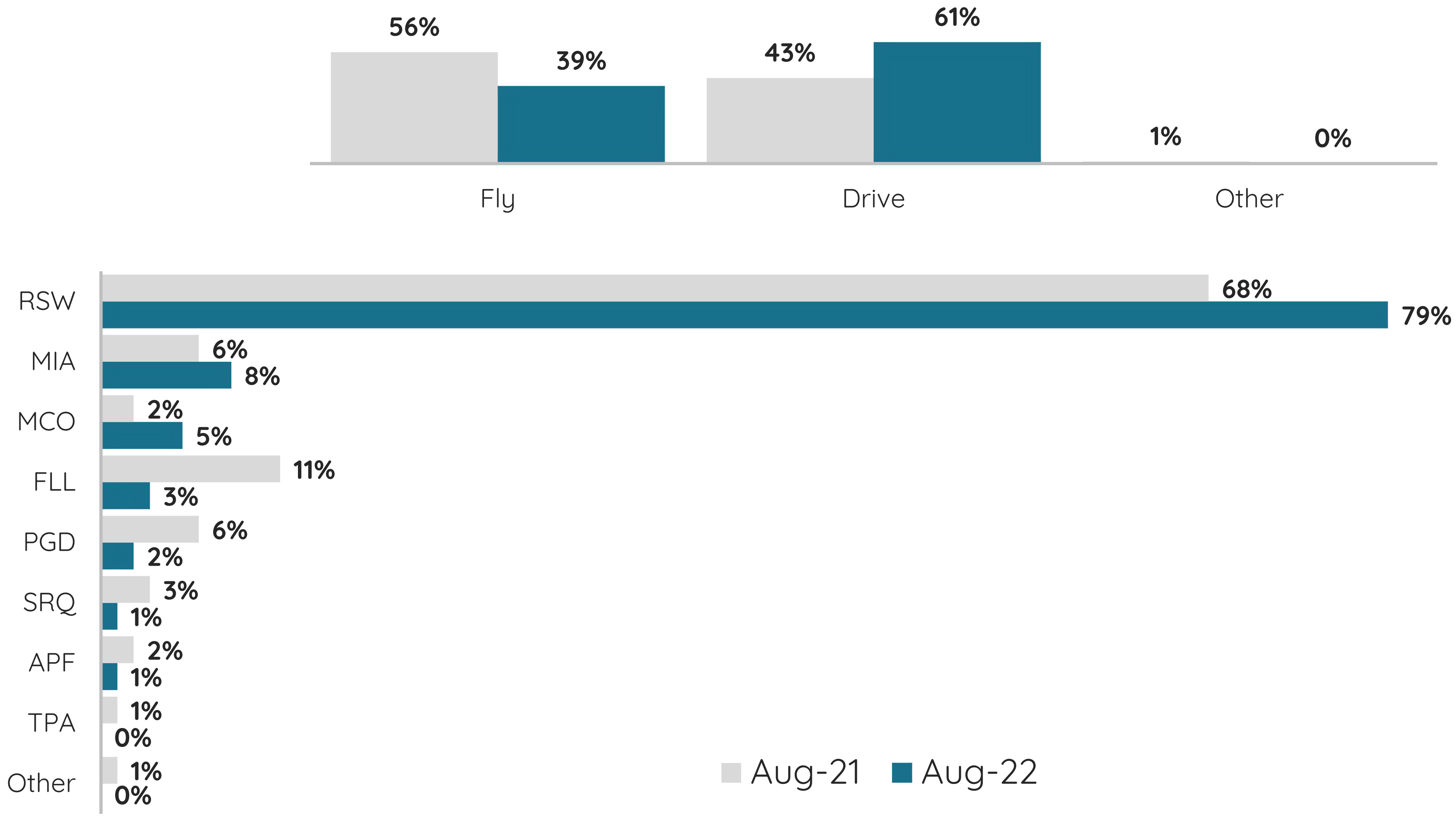
TRANSPORTATION METHODS*



* Visitors staying in paid accommodations.

TYPE OF ACCOMMODATIONS*

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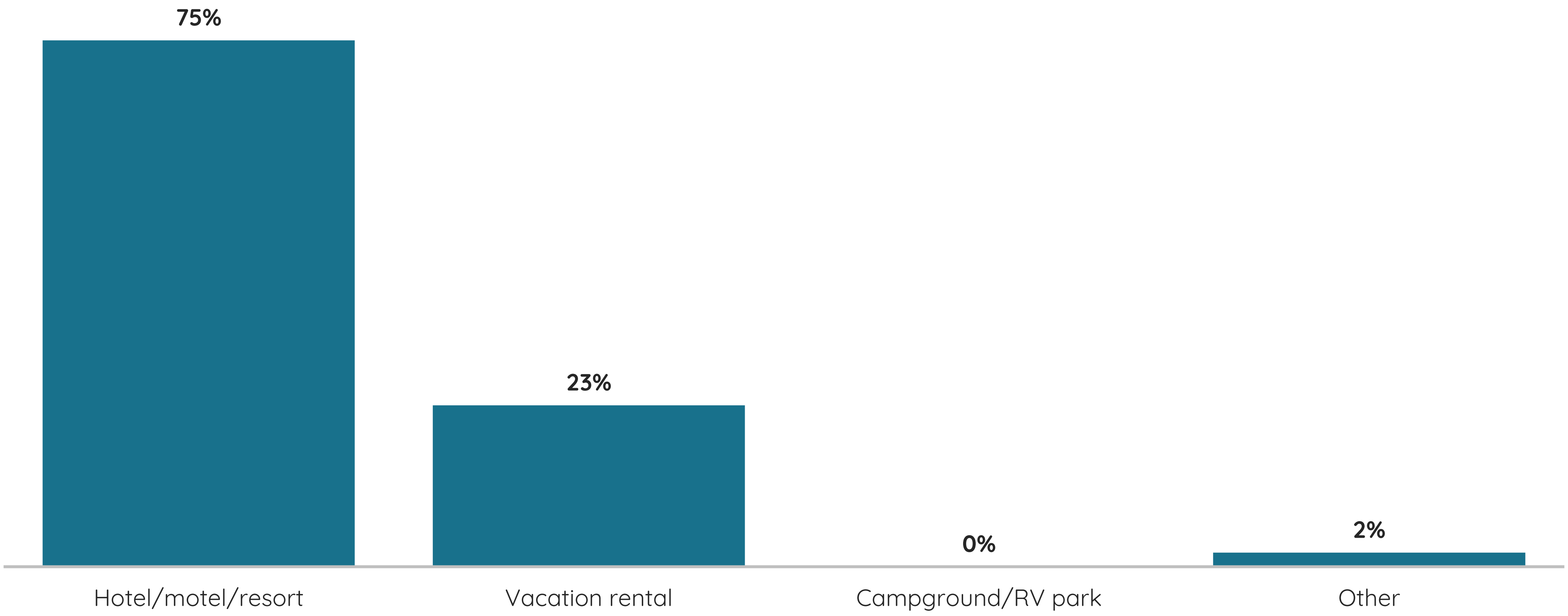
FLORIDA'S PARADISE COAST



* Visitors staying in paid accommodations.

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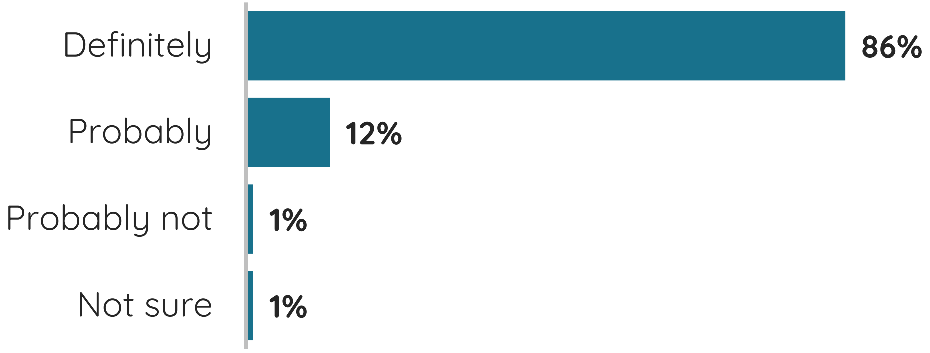
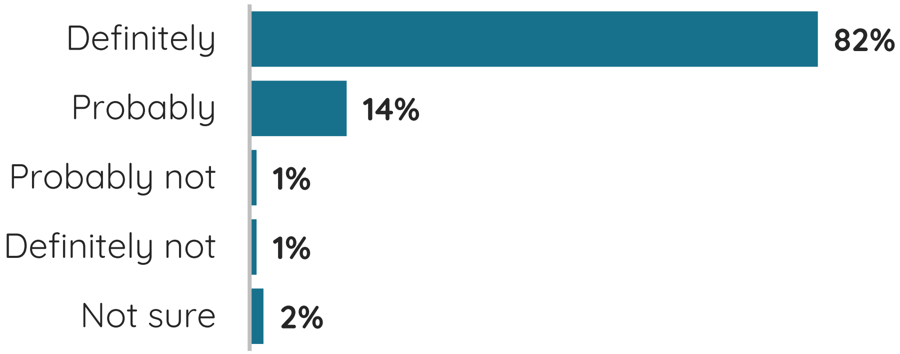
TRIP EVALUATIONS*

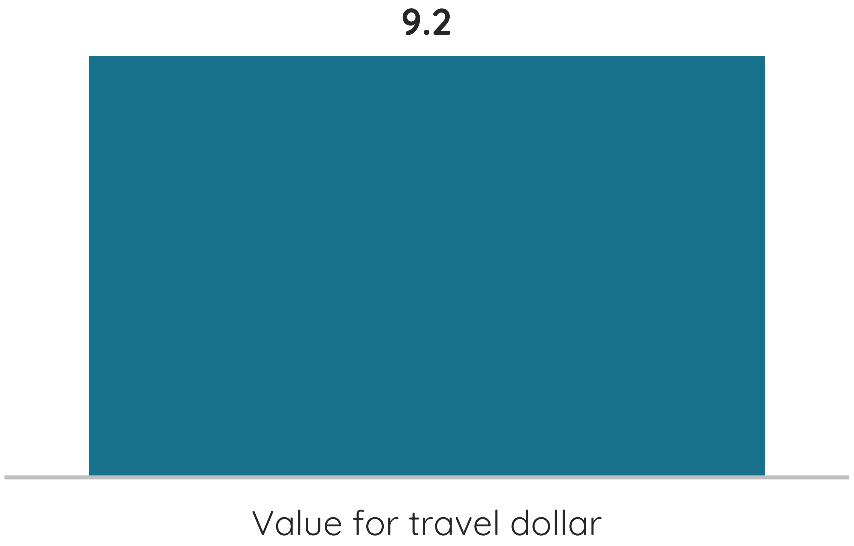
WOULD RECOMMEND THE AREA?



WILL RETURN TO THE AREA?



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.

AUGUST 2022 METRICS

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

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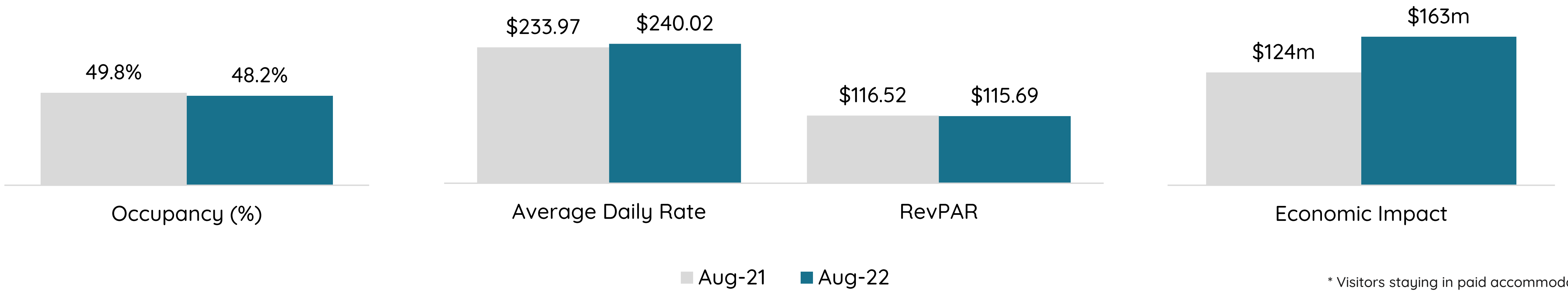
AUGUST 2022 OVERNIGHT VISITATION & LODGING*

NAPLES • MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

	August 2021	August 2022	% Change from 2021
Occupancy Rate	49.8%	48.2%	– 3.2%
Average Daily Rate	$233.97	$240.02	+ 2.6%
RevPAR	$116.52	$115.69	– 0.7%

	August 2021	August 2022	% Change from 2021
Visitors	119,500	164,900	+ 38.0%
Room Nights	167,700	193,200	+ 15.2%
Direct Spending	$82,978,200	$109,240,600	+ 31.6%
Economic Impact	$123,720,500	$162,877,700	+ 31.6%



* Visitors staying in paid accommodations.

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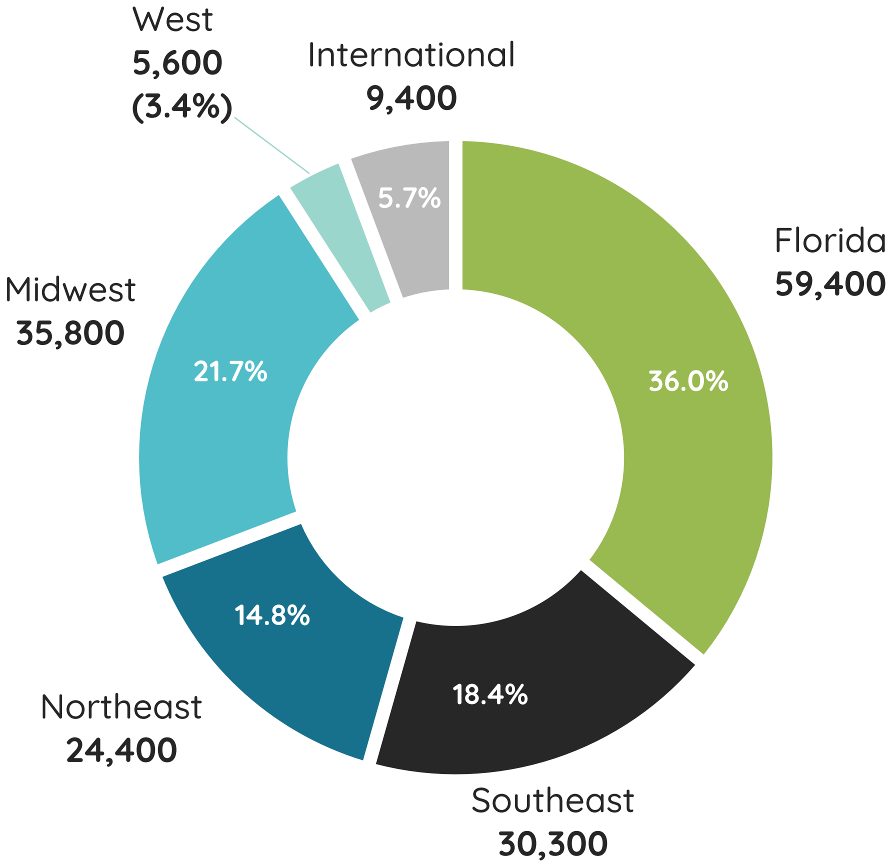
AUGUST 2022 OVERNIGHT VISITOR ORIGIN MARKETS*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

	August 2021		August 2022		Percent Change (Δ%)	
Region	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	32,100	26.9%	59,400	36.0%	+ 85.0%	+ 33.8%
Southeast	24,600	20.6%	30,300	18.4%	+ 23.2%	- 10.7%
Northeast	15,900	13.3%	24,400	14.8%	+ 53.5%	+ 11.3%
Midwest	32,400	27.1%	35,800	21.7%	+ 10.5%	- 19.9%
West	11,800	9.9%	5,600	3.4%	- 52.5%	- 65.7%
Canada	1,100	0.9%	3,300	2.0%	+ 200.0%	+ 122.2%
Europe[1]	-	-	1,300	0.8%	-	-
C/S America	1,600	1.3%	1,300	0.8%	- 18.8%	- 38.5%
Other[1]	-	-	3,500	2.1%	-	-
Total	119,500	100.0%	164,900	100.0%		

[1] Visitation from most international markets was too small to estimate for most of 2020 and 2021.



* Visitors staying in paid accommodations.

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OCCUPANCY BAROMETER

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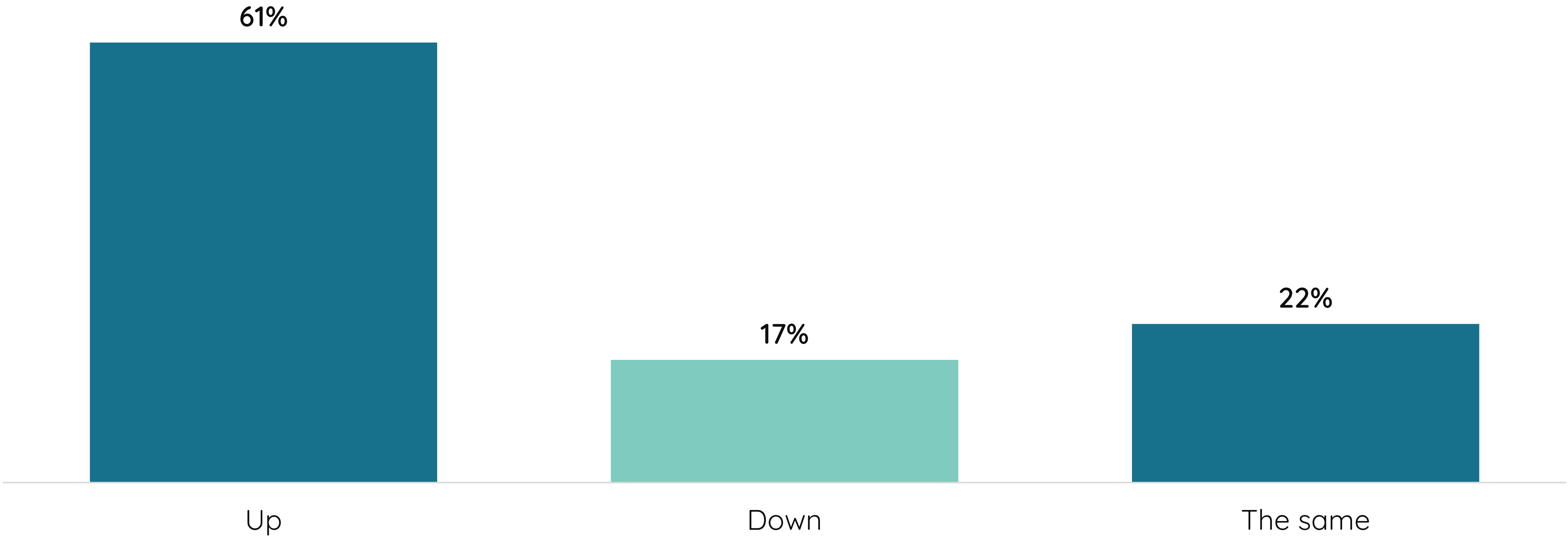
EVERGLADES
FLORIDA'S PARADISE COAST

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



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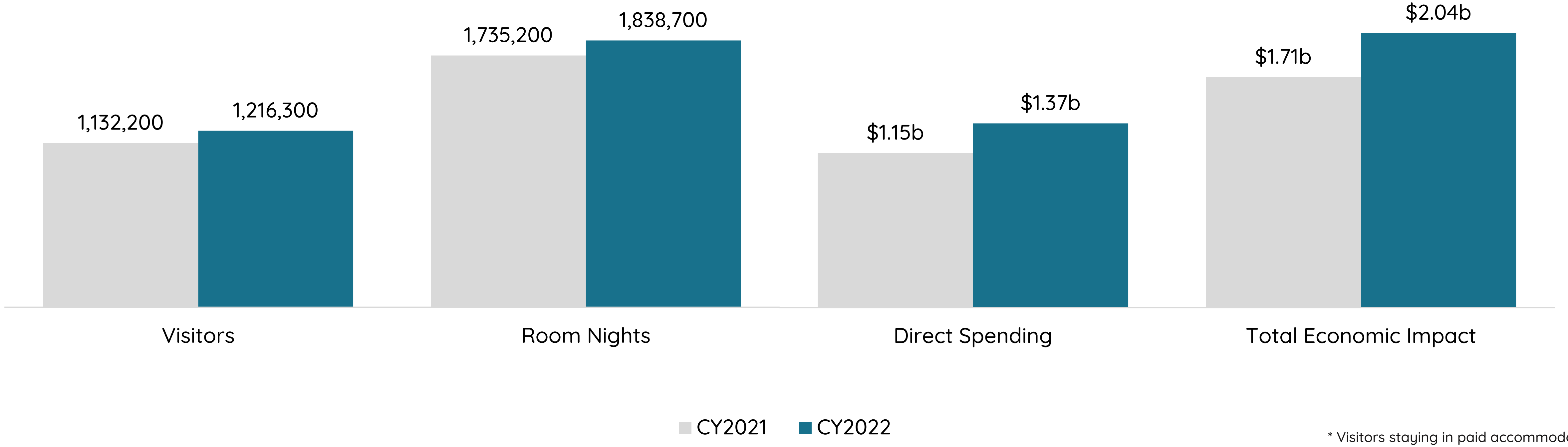
RESEARCH

CALENDAR YEAR-TO-DATE METRICS

CYTD OVERNIGHT VISITATION & LODGING*

	CYTD 2021	CYTD 2022	% Change from 2021
Visitors	1,132,200	1,216,300	+7.4%
Room Nights	1,735,200	1,838,700	+6.0%
Direct Spending	$1,147,685,000	$1,367,925,300	+19.2%
Economic Impact	$1,711,198,400	$2,039,576,700	+19.2%

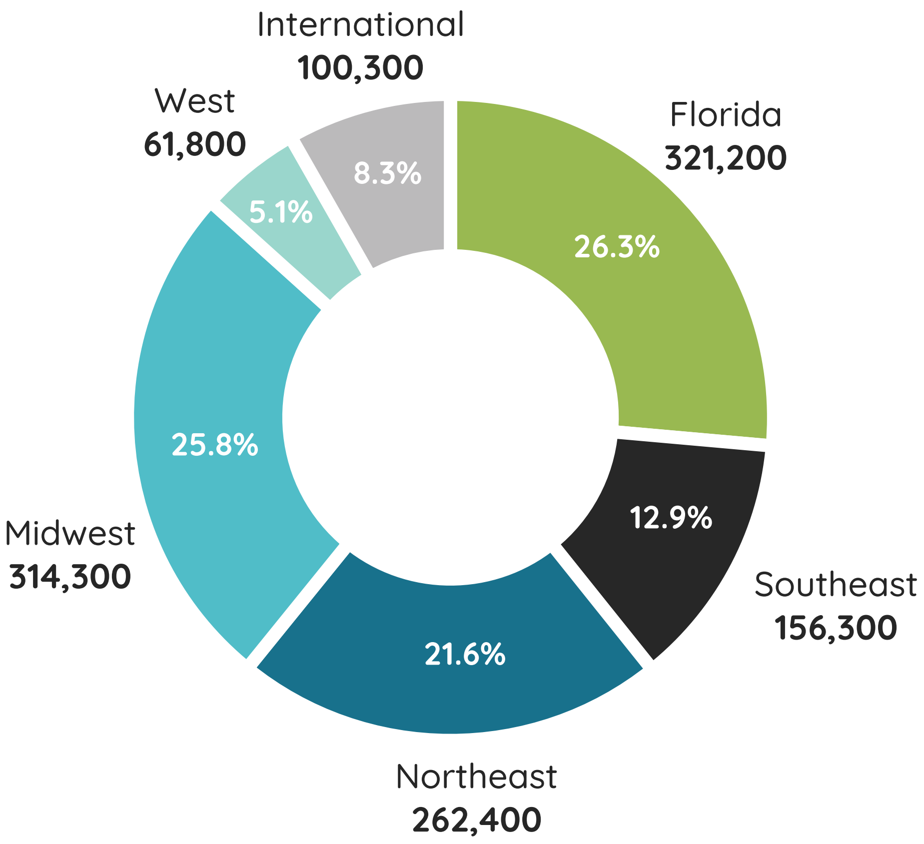


* Visitors staying in paid accommodations.

CYTD OVERNIGHT VISITOR ORIGIN MARKETS*

	CY2021		CY2022		Percent Change (Δ%)	
Region	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	571,600	50.4%	321,200	26.3%	- 43.8%	- 47.8%
Southeast	107,600	9.5%	156,300	12.9%	+ 45.3%	+ 35.8%
Northeast	218,100	19.3%	262,400	21.6%	+ 20.3%	+ 11.9%
Midwest	204,400	18.1%	314,300	25.8%	+ 53.8%	+ 42.5%
West[1]	11,800	1.0%	61,800	5.1%	+ 423.7%	+ 410.0%
Canada[2]	4,000	0.4%	28,200	2.3%	+ 605.0%	+ 475.0%
Europe[2]	13,100	1.2%	44,900	3.7%	+ 242.7%	+ 208.3%
C/S America[2]	1,600	0.1%	13,000	1.1%	+ 712.5%	+ 1000.0%
Other	0	0.0%	14,200	1.2%	-	-
Total	1,132,200	100.0%	1,216,300	100.0%		

[1] Visitation from western U.S. states not separated from "other" category for most of 2021.
[2] Visitation from most international markets was too small to estimate for most of 2020 and 2021.



* Visitors staying in paid accommodations.

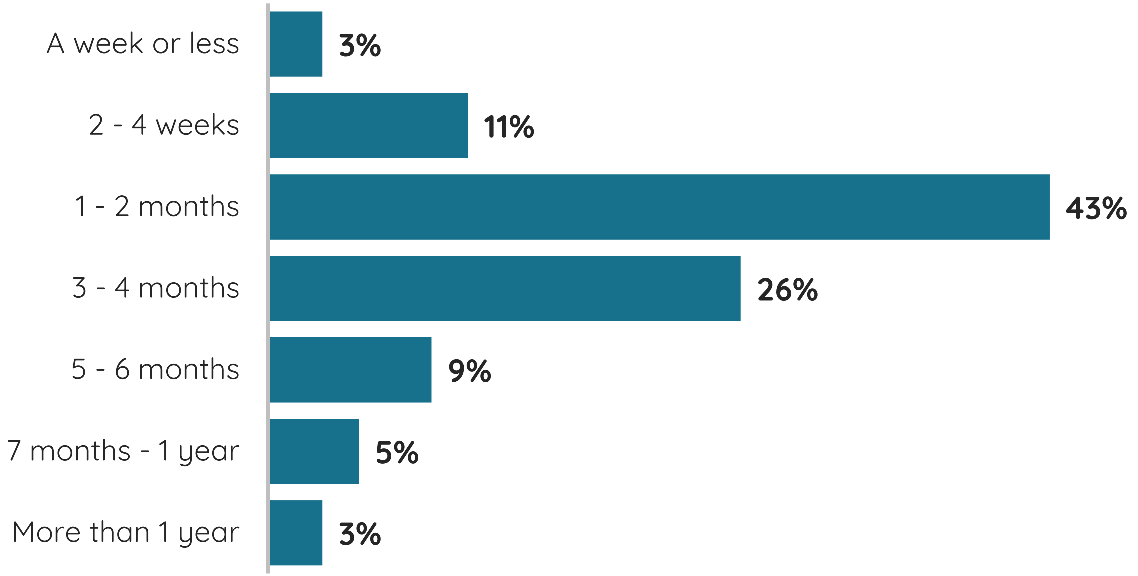
AUGUST 2022 VISITOR PROFILE

OF OVERNIGHT VISITORS

TRIP PLANNING CYCLE*

Trip Planning Cycle			
	Aug-21	Aug-22	Trend
A week or less	-	3%	-
2 - 4 weeks	-	11%	-
1 - 2 months	-	43%	-
3 - 4 months	-	26%	-
5 - 6 months	-	9%	-
7 months – 1 year	-	5%	-
More than 1 year	-	3%	-
Median (days)	**-**	**57**	**-**

[1] Multiple responses permitted.



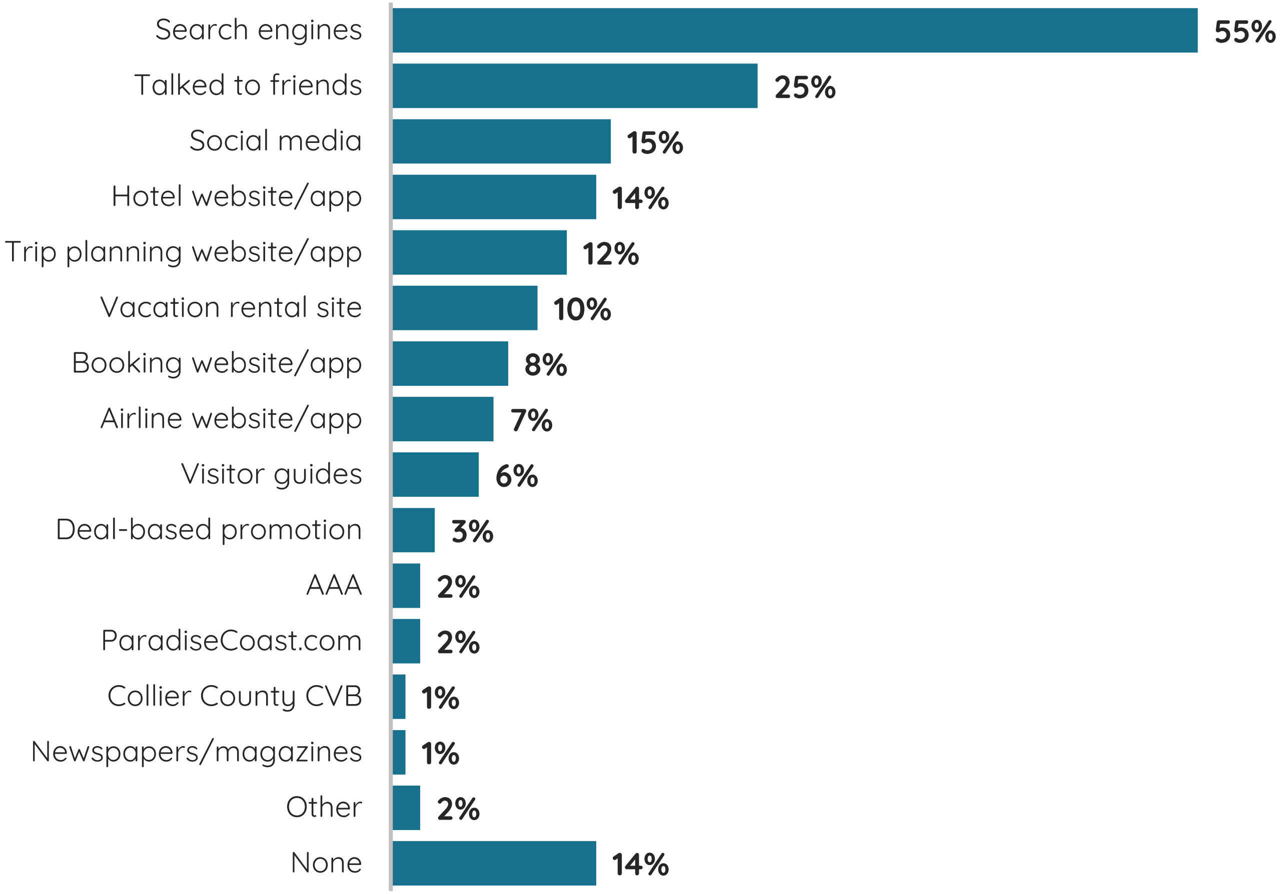
* Visitors staying in paid accommodations.

TRIP PLANNING RESOURCES*

NAPLES • MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

Top Trip Planning Resources[1]			
	Aug-21	Aug-22	Trend
Search engines	-	55%	-
Talked to friends	-	25%	-
Social media	-	15%	-
Hotel website/app	-	14%	-
Trip planning site/app	-	12%	-
Vacation rental site	-	10%	-
Booking website/app	-	8%	-
Airline website/app	-	7%	-
Visitor guides	-	6%	-
Deal-based promotion	-	3%	-
ParadiseCoast.com	-	2%	-
AAA	-	2%	-
Newspapers/magazines	-	1%	-
Collier County CVB	-	1%	-
Other	-	2%	-
None	-	14%	-

[1] Multiple responses permitted.



* Visitors staying in paid accommodations.

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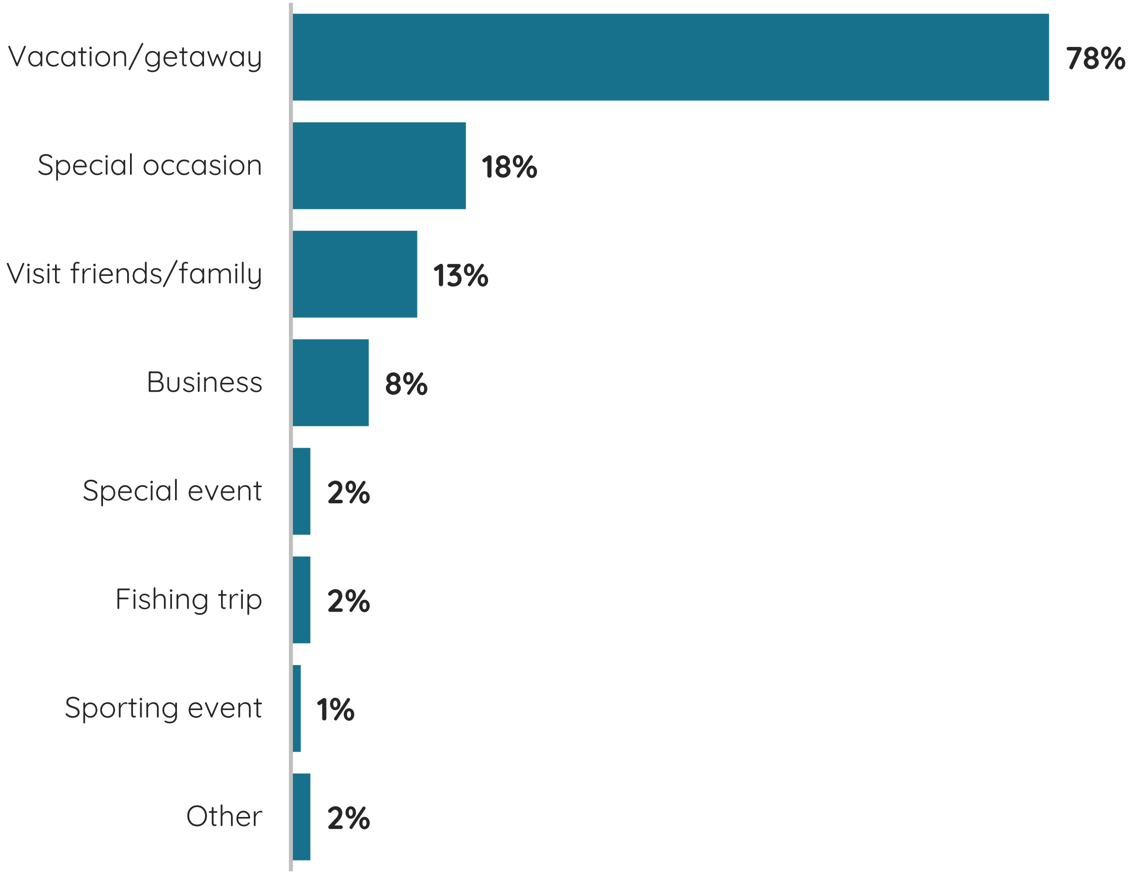
REASONS FOR VISITING*

Top Reasons for Visiting[1]			
	Aug-21	Aug-22	Trend
Vacation/getaway	81%	78%	↓
Special occasion	-	18%	-
Visit friends/family	24%	13%	↓
Business	16%	8%	↓
Fishing trip	-	2%	-
Special event	7%	2%	↓
Sporting event	-	1%	-
Other	-	2%	-

[1] Multiple responses permitted.



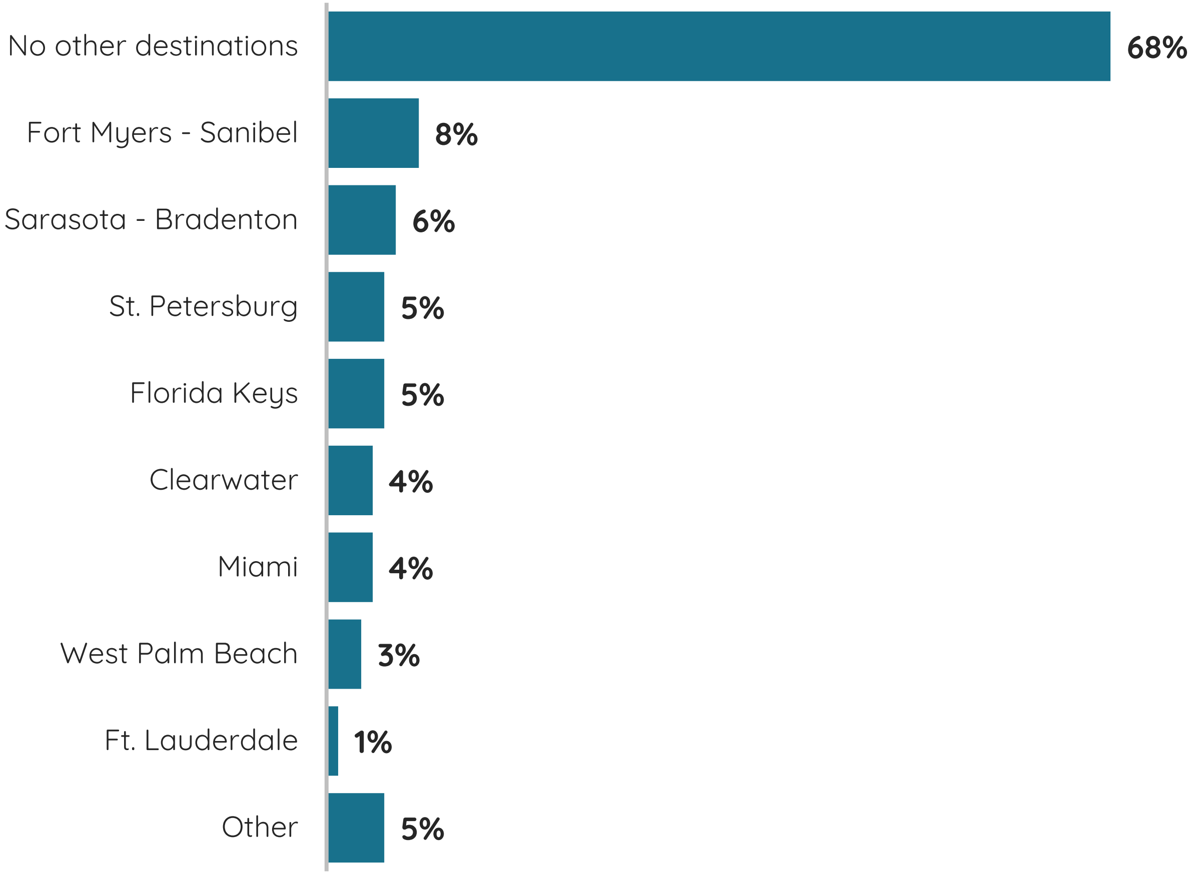
* Visitors staying in paid accommodations.

OTHER DESTINATIONS CONSIDERED*

NAPLES • MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

Other Destinations Considered[1]			
	Aug-21	Aug-22	Trend
No other destinations	-	68%	-
Fort Myers – Sanibel	-	8%	-
Sarasota – Bradenton	-	6%	-
Florida Keys	-	5%	-
St. Petersburg	-	5%	-
Miami	-	4%	-
Clearwater	-	4%	-
West Palm Beach	-	3%	-
Ft. Lauderdale	-	1%	-
Other	-	5%	-

[1] Multiple responses permitted.



* Visitors staying in paid accommodations.

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REASONS FOR CHOOSING AREA*

Reasons for Choosing Area[1]	Aug-21	Aug-22	Trend
Beaches	62%	71%	↑
Quiet/relaxing	39%	52%	↑
Previous experience	29%	37%	↑
Not crowded	29%	35%	↑
Family-friendly destination	15%	30%	↑
Quality of accommodations	24%	23%	↓
Restaurants	21%	18%	↓
Recommendation	21%	14%	↓
Friends/family live here	15%	12%	↓
Shopping	9%	11%	↑
Trying something new	10%	10%	-
Appealing advertisements	14%	9%	↓
Meeting/event hosted here	11%	6%	↓
Golf	9%	5%	↓
Deal/promotion	0%	2%	↑
Wellness	1%	2%	↑
Other	2%	5%	↑

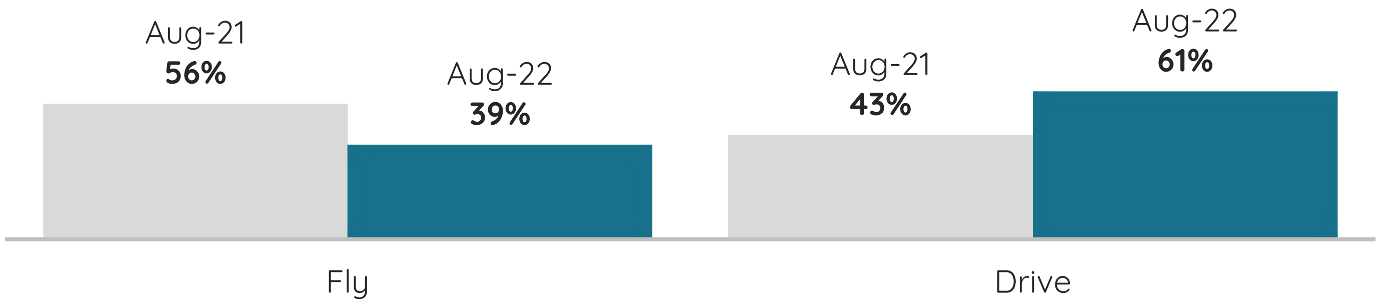
[1] Multiple responses permitted.

* Visitors staying in paid accommodations.

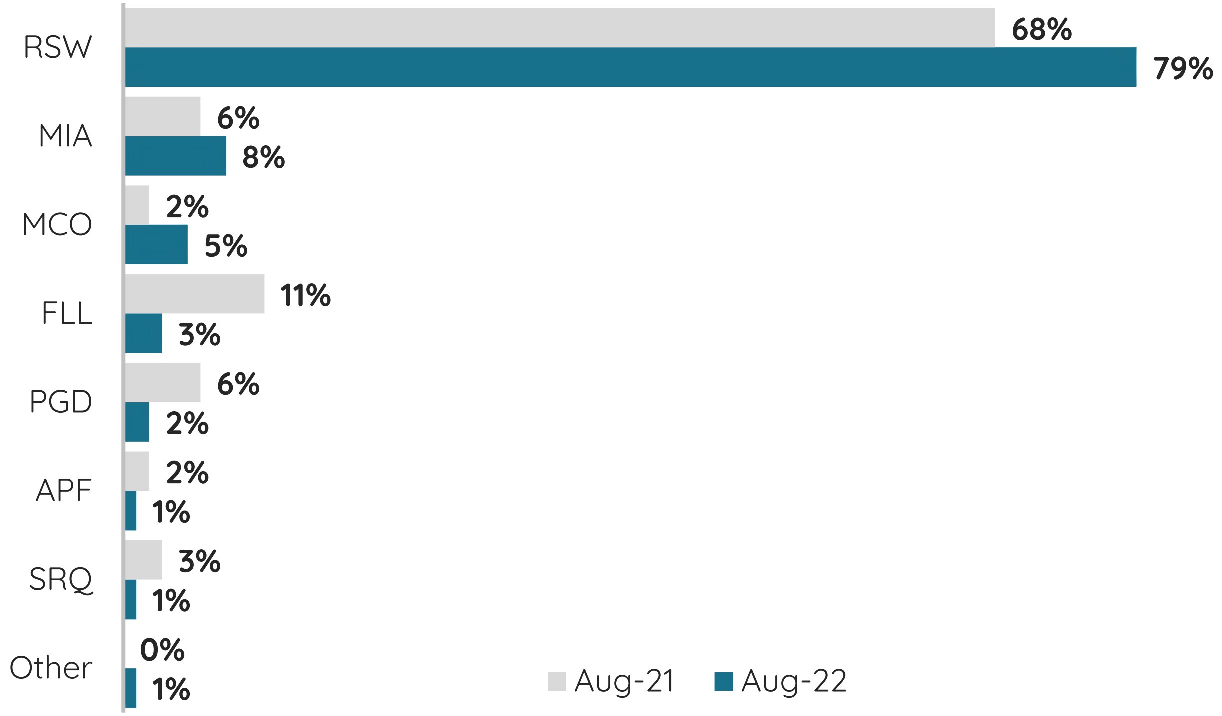
TRANSPORTATION METHODS*

NAPLES • MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

Mode of Transportation	Aug-21	Aug-22	Trend
Fly	56%	39%	↑
Drive	43%	61%	↓



Airport Deplaned (Base: Fly)	Aug-21	Aug-22	Trend
SWFL Intl Airport (RSW)	68%	79%	↓
Miami Intl Airport (MIA)	6%	8%	↑
Orlando Intl Airport (MCO)	2%	5%	↑
Ft. Lauderdale Intl Airport (FLL)	11%	3%	↓
Punta Gorda Airport (PGD)	6%	2%	↓
Naples Airport (APF)	2%	1%	↓
Sarasota/Bradenton (SRQ)	3%	1%	↓
Other	0%	1%	↑



* Visitors staying in paid accommodations.

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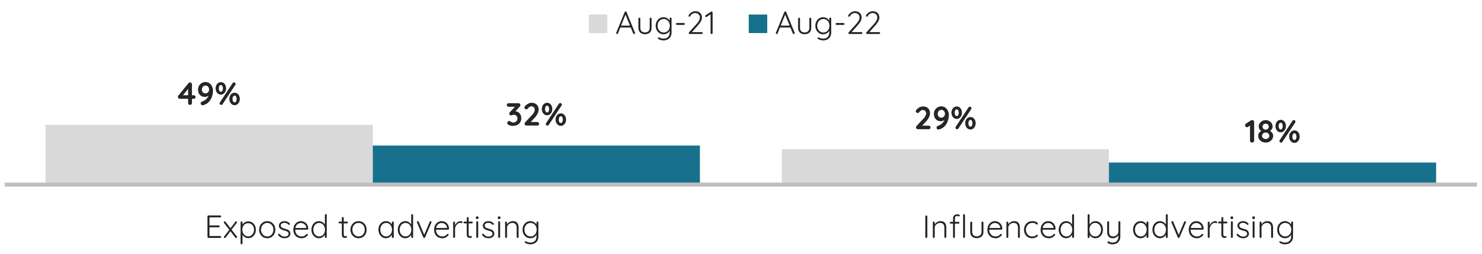
EXPOSURE TO ADVERTISING*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

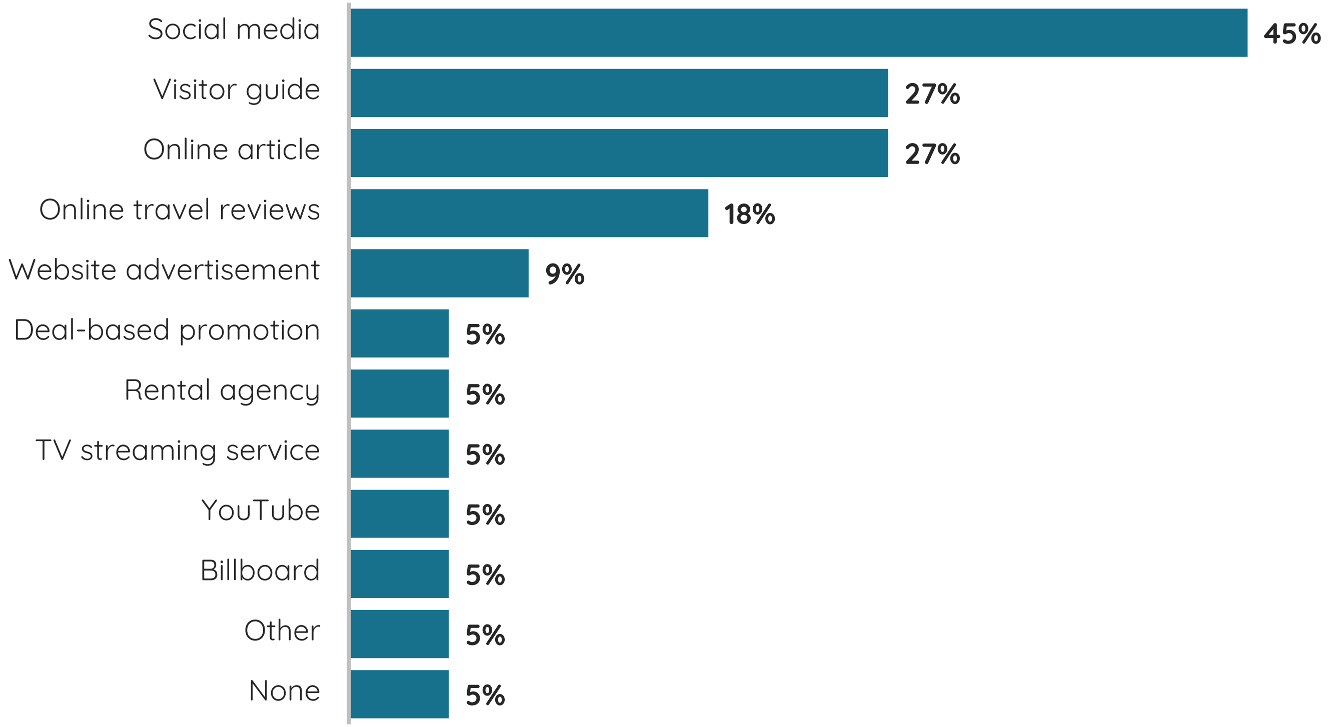
Advertising Exposure & Influence	Aug-21	Aug-22	Trend
Exposed to advertising	49%	32%	↓
Influenced by advertising	29%	18%	↓

Top Advertising Sources Noticed[1]	Aug-21	Aug-22	Trend
Social media	-	45%	-
Online article	-	27%	-
Visitor guide	-	27%	-
Online travel reviews	-	18%	-
Website advertisement	-	9%	-
Billboard	-	5%	-
YouTube	-	5%	-
TV streaming service	-	5%	-
Rental agency	-	5%	-
Deal-based promotion	-	5%	-
Music streaming service	-	0%	-
Cable/satellite TV	-	0%	-
Radio	-	0%	-
Podcast	-	0%	-
Brochure	-	0%	-
Newspaper/magazine	-	0%	-
Other	-	5%	-
None	-	5%	-

[1] Base of visitors exposed to advertising. Multiple responses permitted.



Base: 32% who saw/read/heard ads



* Visitors staying in paid accommodations.

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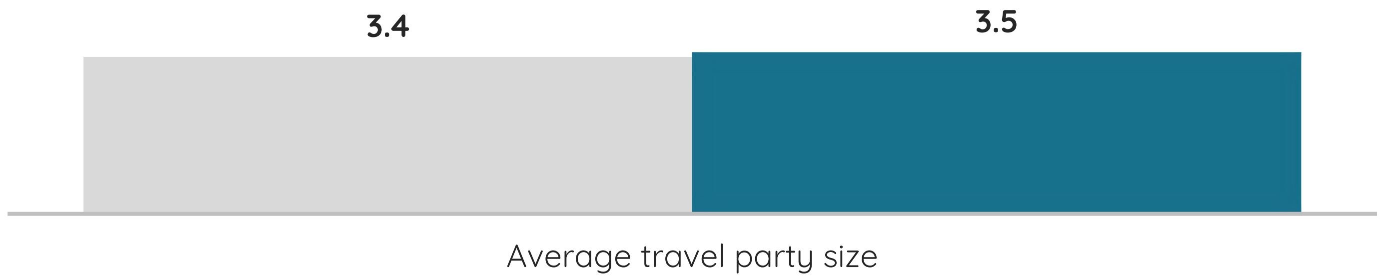
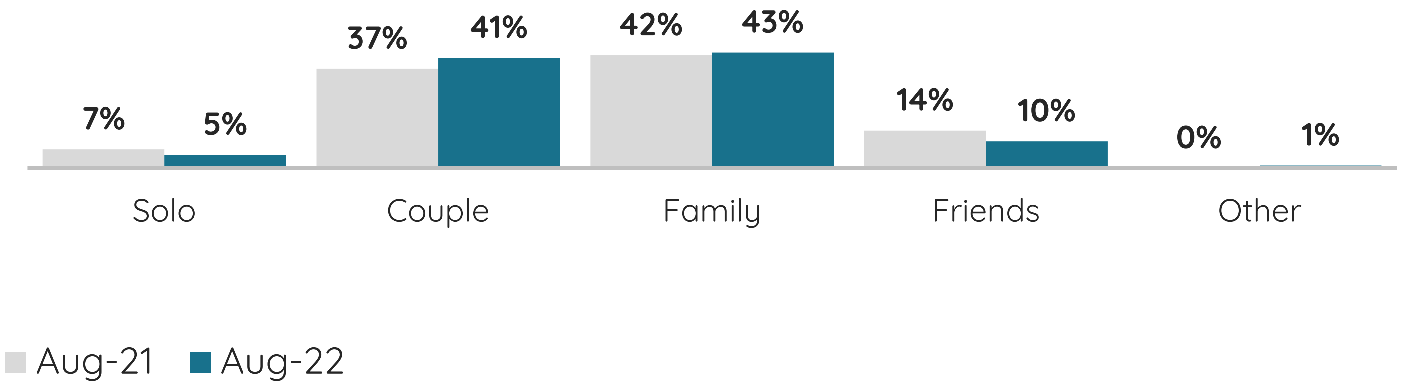
TRAVEL PARTIES*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

Average Visitors per Travel Party			
	Aug-21	Aug-22	Trend
Average travel party size	3.4	3.5	↑



Travel Party Composition			
	Aug-21	Aug-22	Trend
Solo	7%	5%	↓
Couple	37%	41%	↓
Family	42%	43%	↑
Friends	14%	10%	-
Other	0%	1%	↑



* Visitors staying in paid accommodations.

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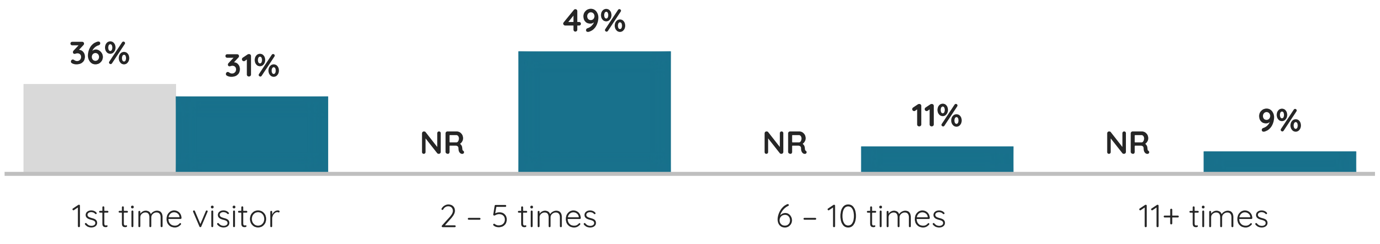
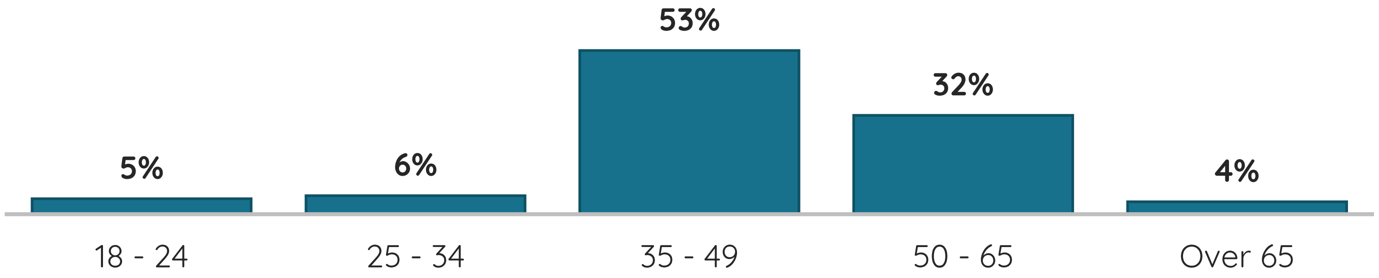
VISITING PARADISE COAST*

NAPLES • MARCO ISLAND
EVERGLADES
FLORIDA'S PARADISE COAST

Previous Visits			
	Aug-21	Aug-22	Trend
1st time visitor	36%	31%	↓
2 – 5 times	-	49%	-
6 – 10 times	-	11%	-
11+ times	-	9%	-



Typical Visitor Ages			
	Aug-21	Aug-22	Trend
Median Age	-	45	-
Average Age	43.9	46.8	↑



* Visitors staying in paid accommodations.

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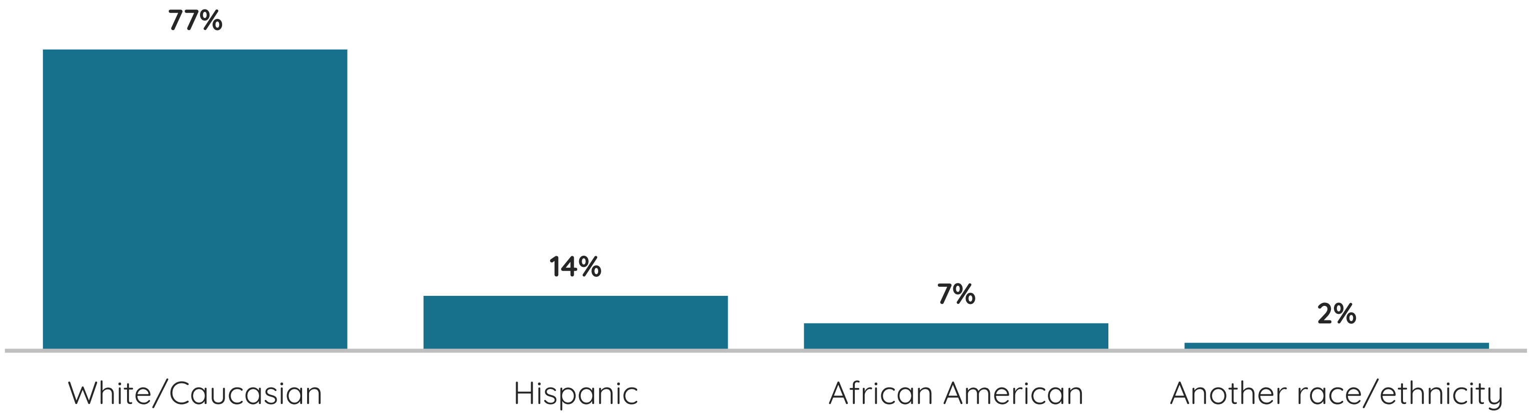
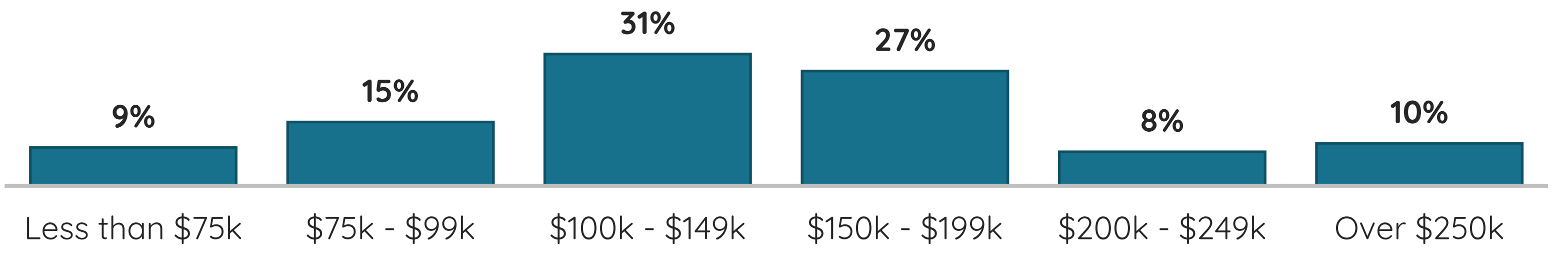
VISITOR DEMOGRAPHICS*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

Race/Ethnicity			
	Aug-21	Aug-22	Trend
White/Caucasian	-	77%	-
Hispanic	-	14%	-
African American	-	7%	-
Asian	-	0%	-
Native/Indigenous	-	0%	-
Another race/ethnicity	-	2%	-



Typical Visitor Household Income			
	Aug-21	Aug-22	Trend
Median HHI	$145,200	$141,900	↓



* Visitors staying in paid accommodations.

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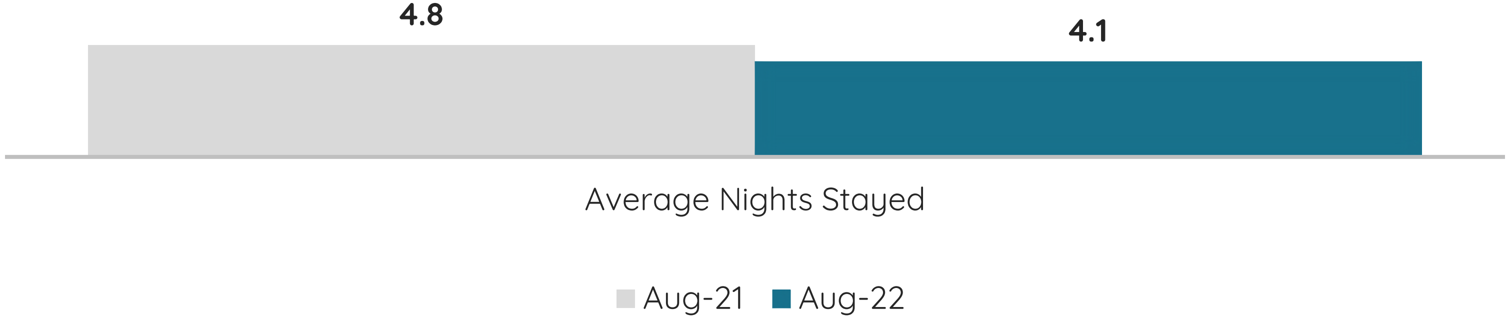
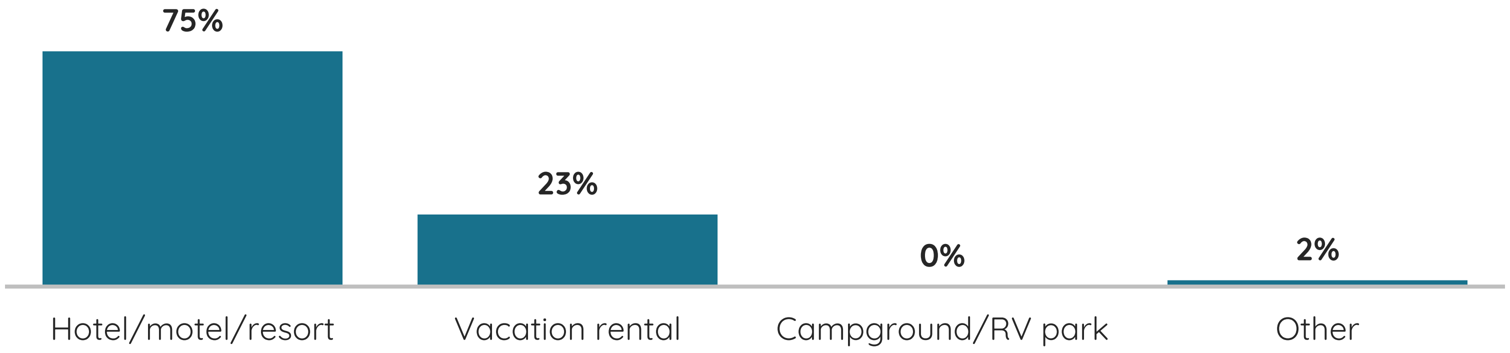
OVERNIGHT VISITS*

NAPLES • MARCO ISLAND
EVERGLADES
FLORIDA'S PARADISE COAST

Nights in Destination			
	Aug-21	Aug-22	Trend
Nights Stayed (mean)	4.8	4.1	↓



Accommodations			
	Aug-21	Aug-22	Trend
Hotel/motel/resort	-	75%	-
Vacation rental	-	23%	-
Campground/RV park	-	0%	-
Other	-	2%	-



* Visitors staying in paid accommodations.

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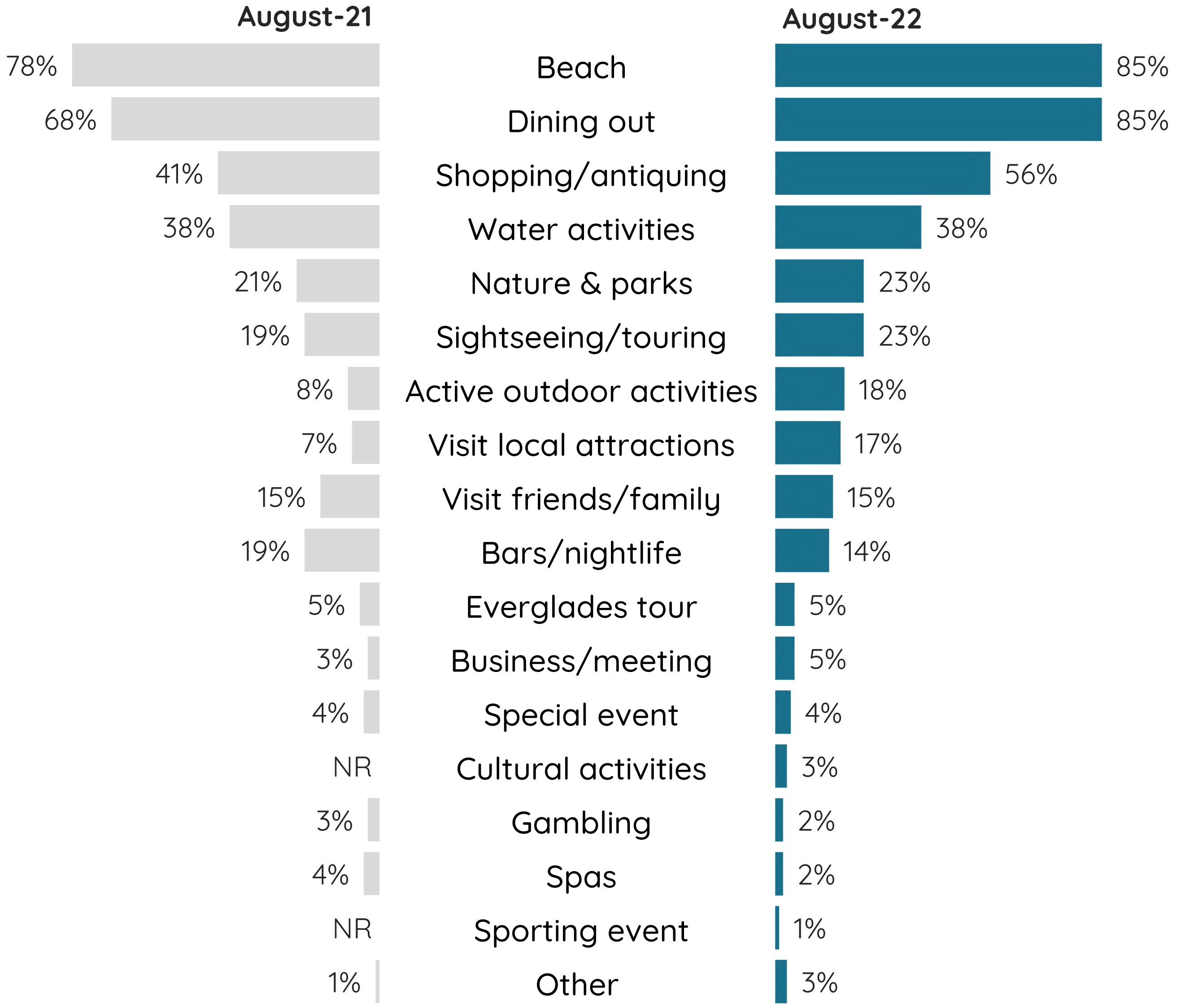
TRIP ACTIVITIES*

Trip Activities[1]			
	Aug-21	Aug-22	Trend
Beach	78%	85%	↑
Dining out	68%	85%	↑
Shopping/antiquing	41%	56%	↑
Water activities	38%	38%	-
Nature & parks	21%	23%	↑
Sightseeing/touring	19%	23%	↑
Active outdoor activities	8%	18%	↑
Visit local attractions	7%	17%	↑
Visit friends/family	15%	15%	-
Bars/nightlife	19%	14%	↓
Everglades tour	5%	5%	-
Business/meeting	3%	5%	↑
Special event	4%	4%	-
Cultural activities	-	3%	-
Gambling	3%	2%	↓
Spas	4%	2%	↓
Sporting event	-	1%	-
Other	1%	3%	↑

[1] Multiple responses permitted.

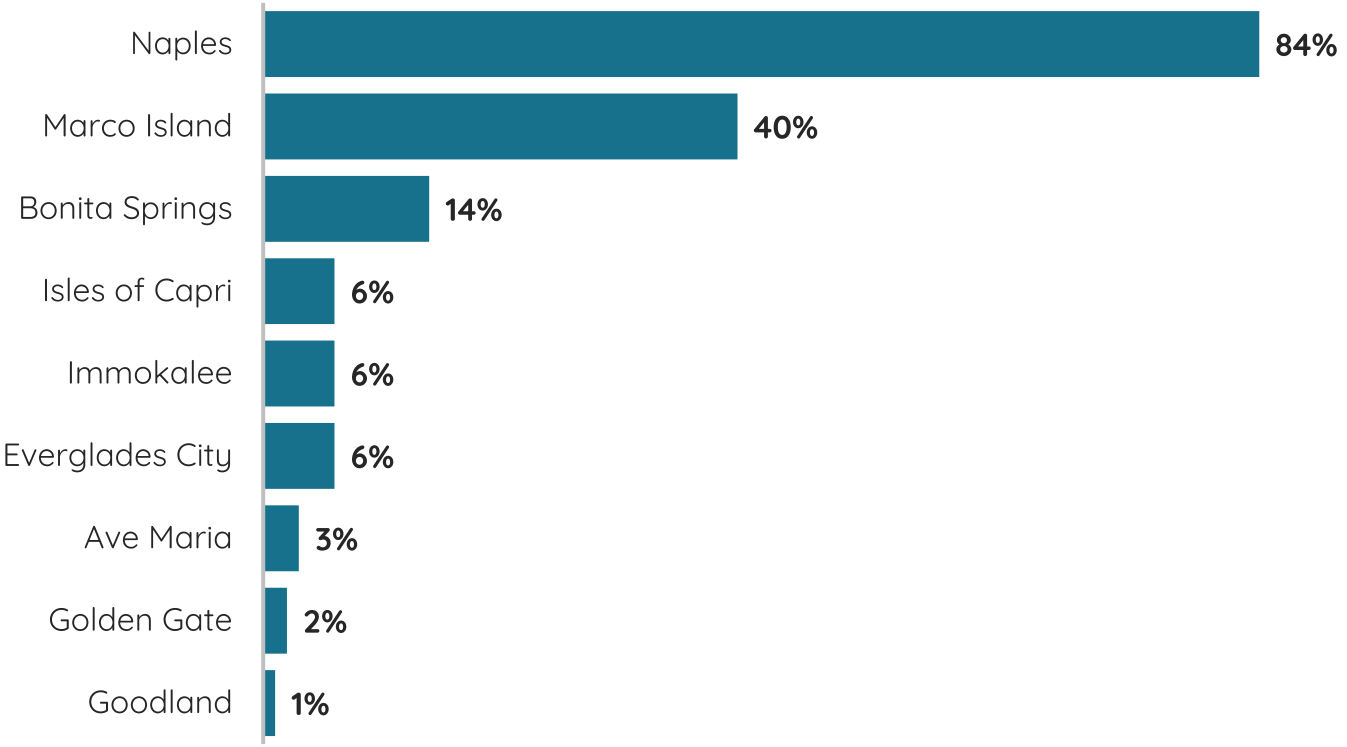


* Visitors staying in paid accommodations.

AREAS VISITED*

Areas Visited in Destination[1]			
	Aug-21	Aug-22	Trend
Naples	-	84%	-
Marco Island	-	40%	-
Bonita Springs	-	14%	-
Everglades City	-	6%	-
Immokalee	-	6%	-
Isles of Capri	-	6%	-
Ave Maria	-	3%	-
Golden Gate	-	2%	-
Goodland	-	1%	-

[1] Multiple responses permitted.

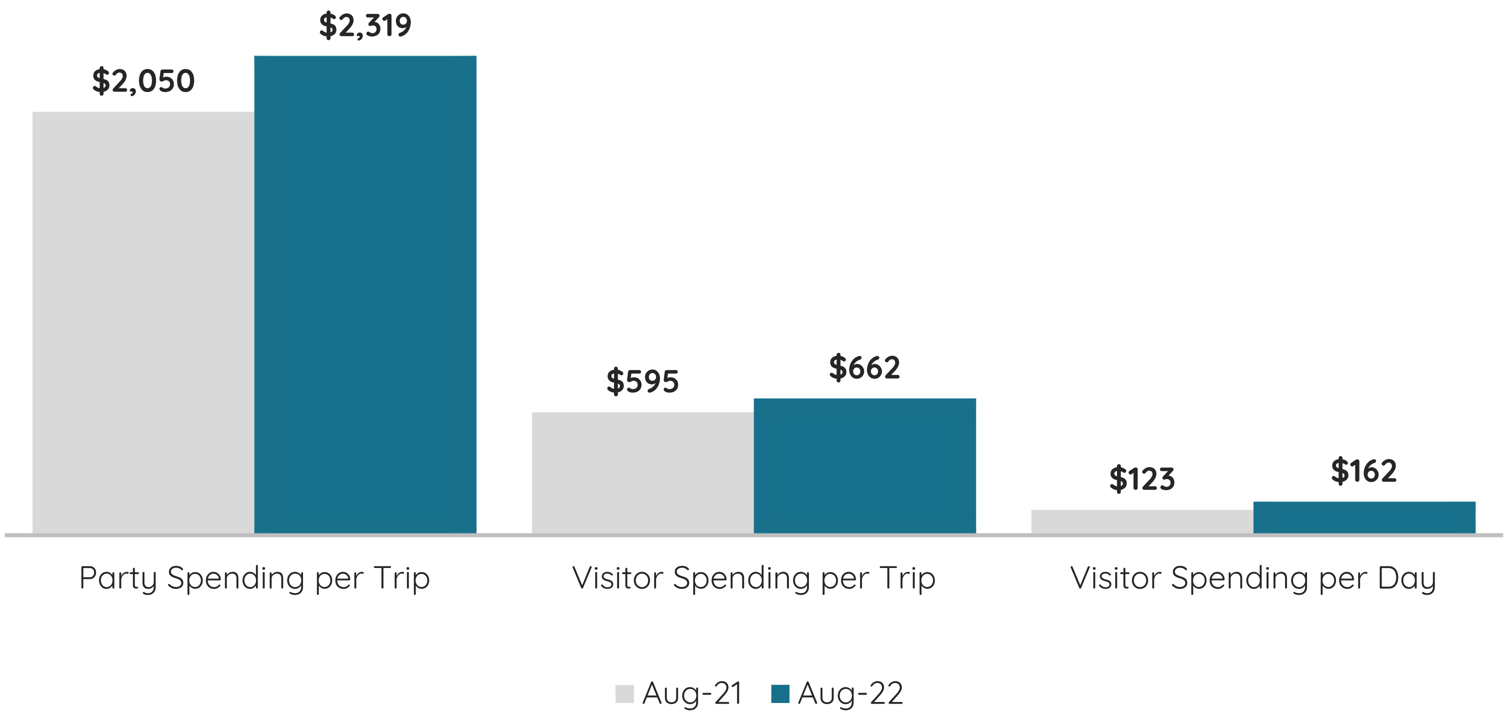


* Visitors staying in paid accommodations.

VISITOR SPENDING*

NAPLES • MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

Visitor Spending			
	Aug-21	Aug-22	Trend
Party Spending per Trip	$2,050	$2,319	↑
Visitor Spending per Trip	$595	$662	↑
Visitor Spending per Day	$123	$162	↑



* Visitors staying in paid accommodations.

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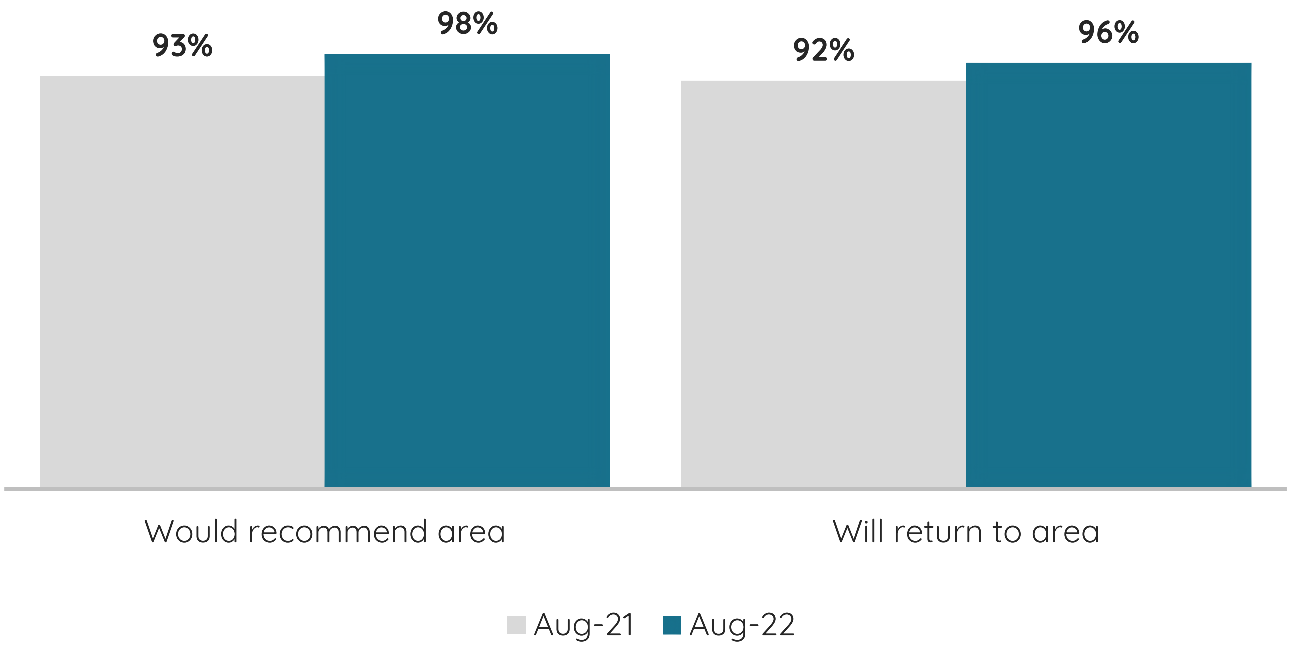
TRIP EVALUATIONS*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

Satisfaction with Destination			
	Aug-21	Aug-22	Trend
Value for travel dollar[1]	-	9.2	-
Would recommend area	93%	98%	↑
Will return to area	92%	96%	↑

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



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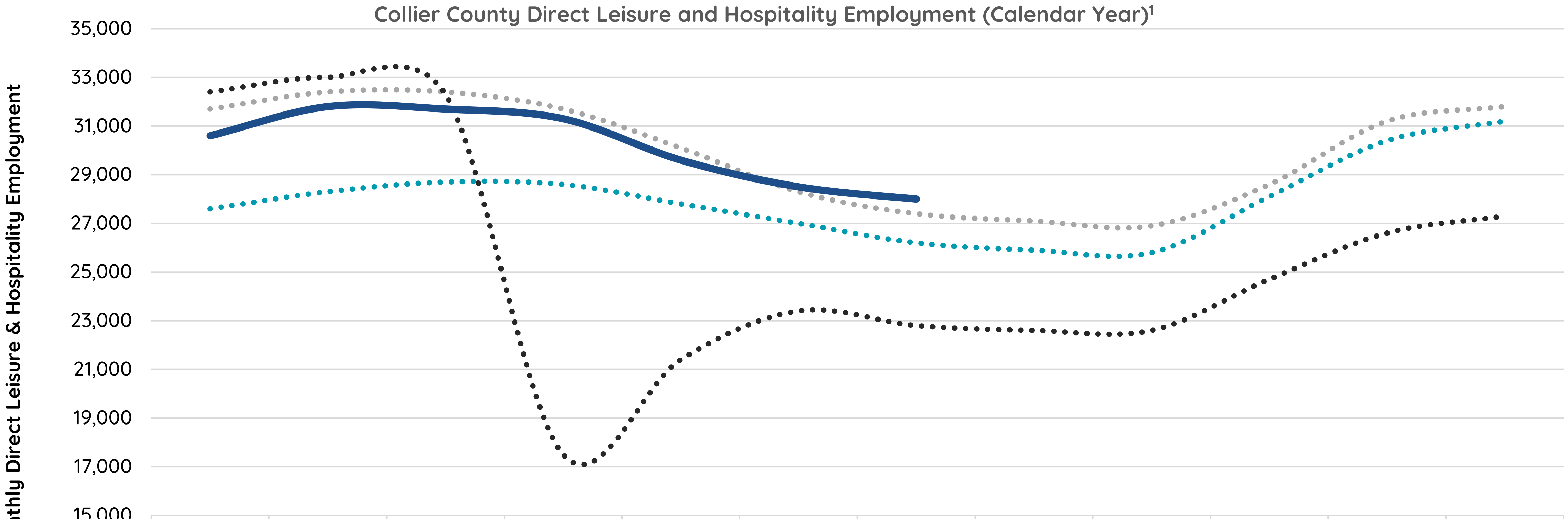
INDUSTRY DATA

LEISURE & HOSPITALTY EMPLOYMENT

NAPLES · MARCO ISLAND
EVERGLADES
FLORIDA'S PARADISE COAST



	January	February	March	April	May	June	July	August	September	October	November	December
2019	31,700	32,400	32,400	31,700	30,100	28,300	27,400	27,100	26,900	28,600	31,200	31,800
2020	32,400	33,000	32,300	17,500	21,400	23,400	22,800	22,600	22,600	24,700	26,600	27,300
2021	27,600	28,300	28,700	28,600	27,800	27,000	26,200	25,900	25,800	28,100	30,400	31,200
2022	30,600	31,800	31,700	31,300	29,600	28,500	28,000 (P)					

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

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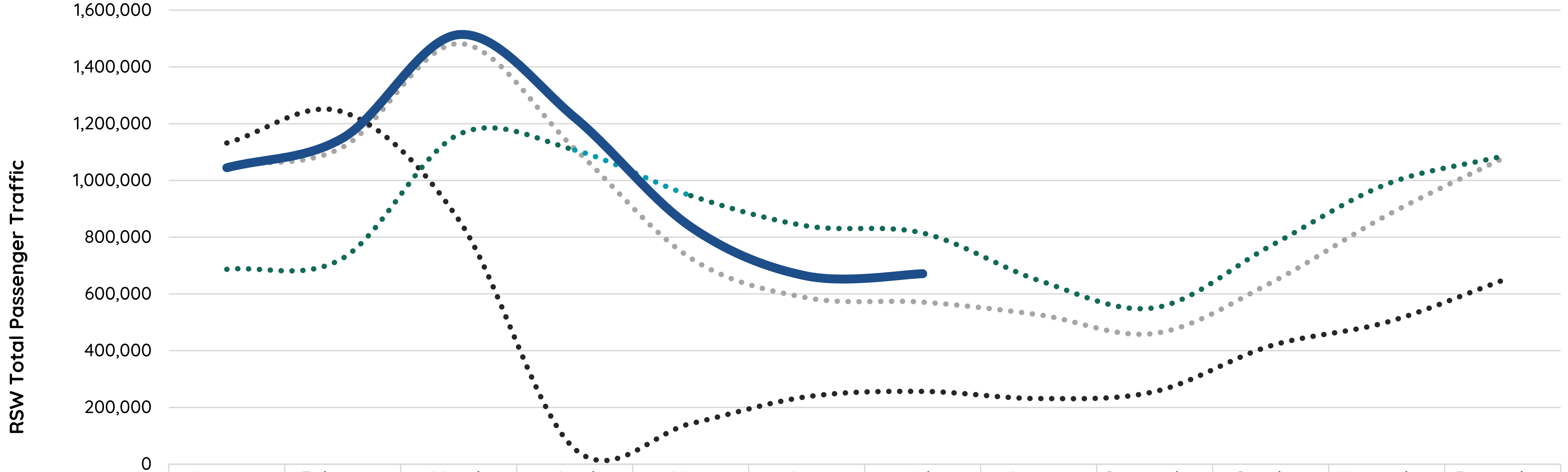
RSW PASSENGER TRAFFIC

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

Southwest Florida International Airport (RSW) Passenger Traffic



	January	February	March	April	May	June	July	August	September	October	November	December
2019	1,050,093	1,117,409	1,482,239	1,111,558	725,754	586,319	570,977	526,519	460,869	638,922	876,703	1,077,818
2020	1,132,103	1,241,590	861,221	53,379	143,004	237,706	256,418	231,283	255,926	417,305	500,468	648,011
2021	686,563	725,735	1,162,342	1,107,004	946,366	839,377	814,471	647,534	551,041	769,524	986,908	1,085,569
2022	1,044,816	1,149,618	1,514,046	1,221,628	836,379	663,141	671,225					

[1] SOURCE: Lee County Port Authority Monthly Statistics.

LICENSED TRANSIENT RENTAL UNITS

NAPLES • MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

August 2022 Licensed Transient Rental Units[1]				
	Hotel	Motel	Vacation Rental	Total
Naples	4,452	1,553	3,222	9,167
Marco Island	1,275	115	1,821	3,092
Immokalee	0	55	104	159
Golden Gate	0	150	0	150
Everglades City	38	36	14	88
Bonita Springs	0	5	62	66
Chokoloskee	0	13	2	15
Goodland	0	5	4	9
Ochopee	0	0	2	2
Ave Maria	0	0	1	1
Total	**5,765**	**1,932**	**5,232**	**12,929**

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

NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau

August 2022 Monthly Dashboard

Paul Beirnes, Executive Director
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