

NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau
August 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. Prior to 2023, reports were based solely on data from visitors who stayed in paid accommodations.



Occupancy was down 7.8% from August 2022, while visitation was down 25.3%. Meanwhile, average length of stay was up 13.0% which helped moderate the effect on room nights, which were down 13.1%.



Visitor Spend per Day in August increased 13% from 2022, while the Total Economic Impact of Tourism was down 11.8% from August 2022.



International visitation in August 2023 nearly doubled compared to August 2022. The largest upticks were again from European & Canadian visitors. Top European origins were Germany and the United Kingdom.



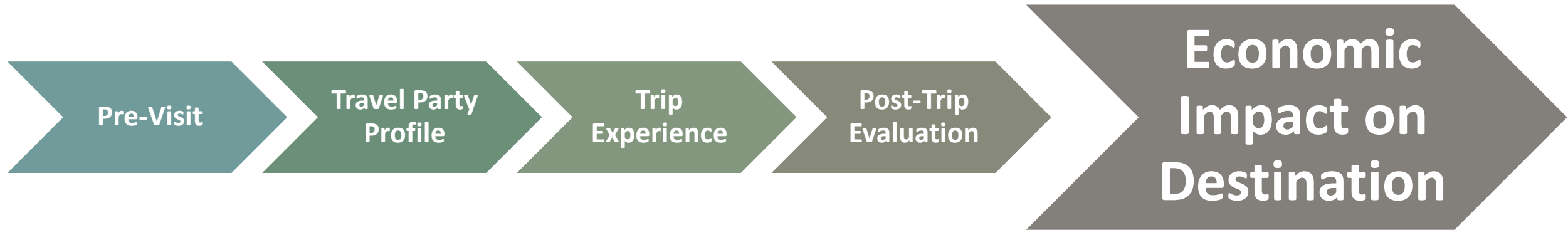
33% of August visitors considered other destinations before deciding to visit Collier County, up 5% points from August 2022. There was again a significant increase in the proportion of visitors who considered the Ft. Myers area.



August visitors rated the value they got for their travel dollar at 8.9, down from 9.1 in July. All visitors who gave a score below 7 cited cost/expense as the main reason for giving their rating.



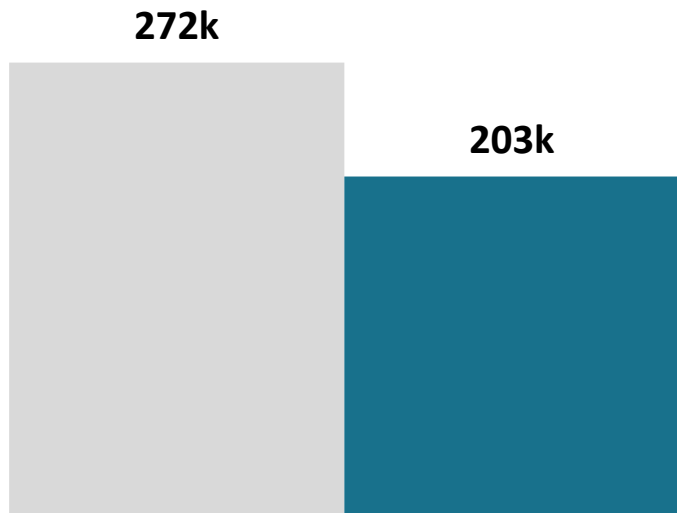
VISITOR JOURNEY: ECONOMIC IMPACT



AUGUST 2023 VISITATION & ROOM NIGHTS

VISITORS

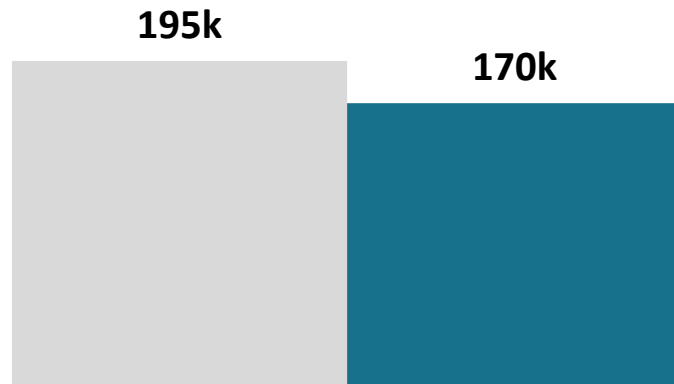
203,400



- 25.3% from 2022

ROOM NIGHTS

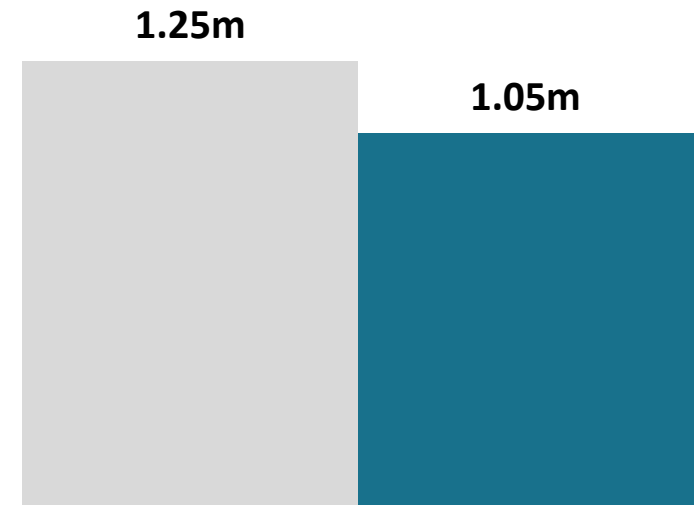
169,700



- 13.1% from 2022

VISITOR DAYS

1,047,500



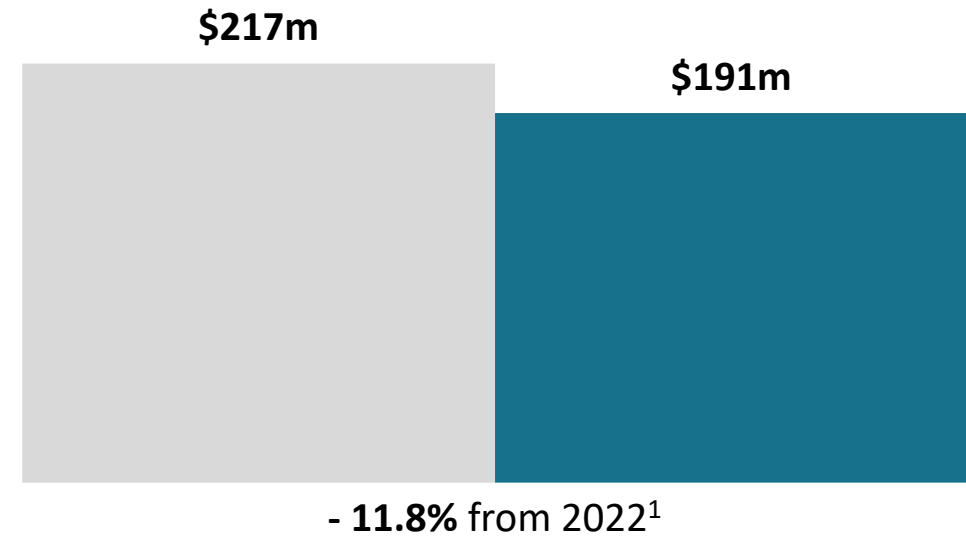
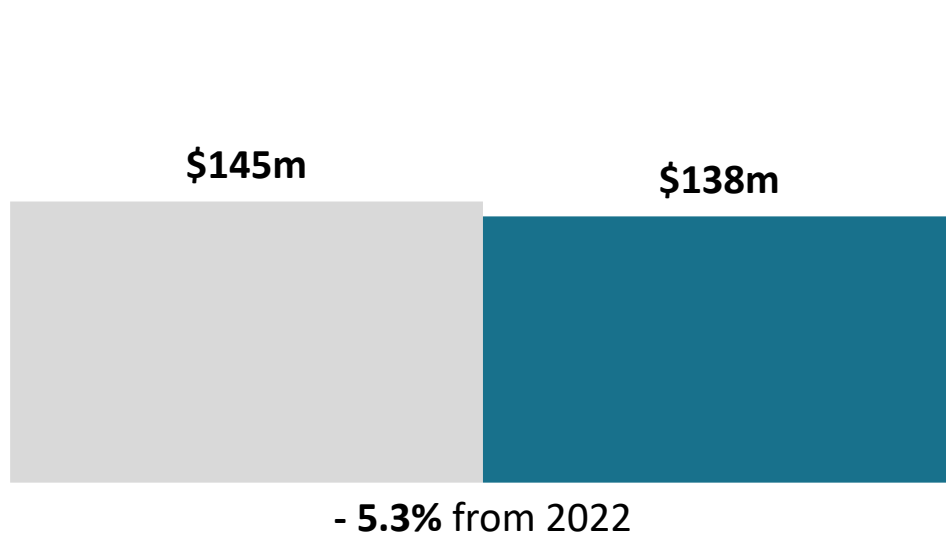
- 16.3% from 2022

■ Aug-22 ■ Aug-23

AUGUST 2023 SPENDING & ECONOMIC IMPACT

DIRECT SPENDING
\$137,728,600

ECONOMIC IMPACT
\$191,167,300



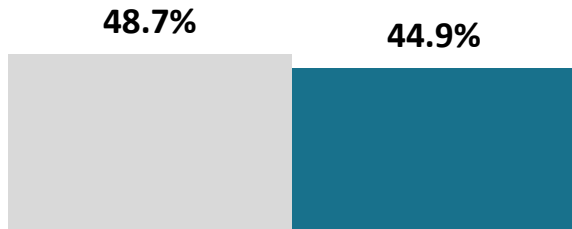
■ Aug-22 ■ Aug-23

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

AUGUST 2023 OVERALL LODGING METRICS^{1,2}

OCCUPANCY RATE

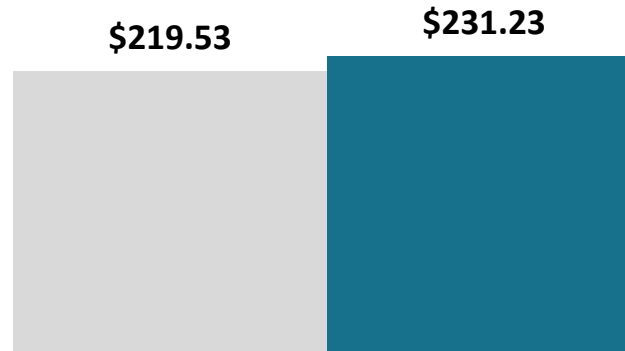
44.9%



- 7.8% from 2022

AVERAGE DAILY RATE

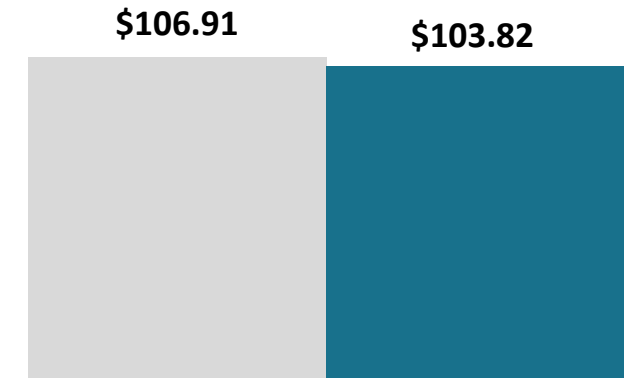
\$231.23



+ 5.3% from 2022

REVENUE PER AVAILABLE ROOM

\$103.82



- 2.9% from 2022

■ Aug-22 ■ Aug-23

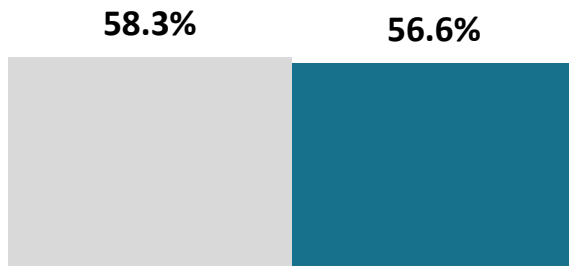
¹ Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

² Occupancy, ADR, and RevPAR figures for August 2022 have been adjusted to reflect updated calculation methods.

AUGUST 2023 HOTEL LODGING METRICS¹

OCCUPANCY RATE

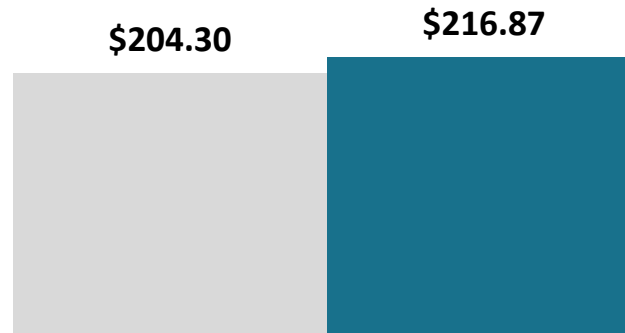
56.6%



- 2.9% from 2022

AVERAGE DAILY RATE

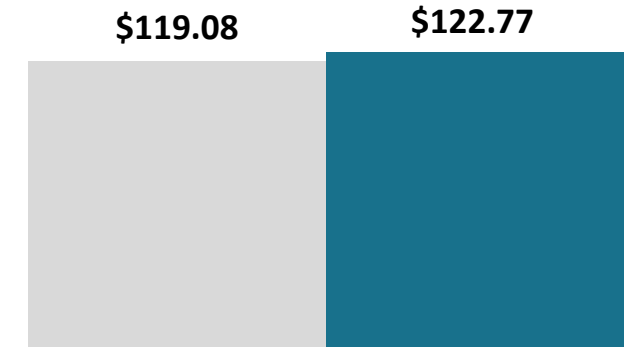
\$216.87



+ 6.2% from 2022

REVENUE PER AVAILABLE ROOM

\$122.77

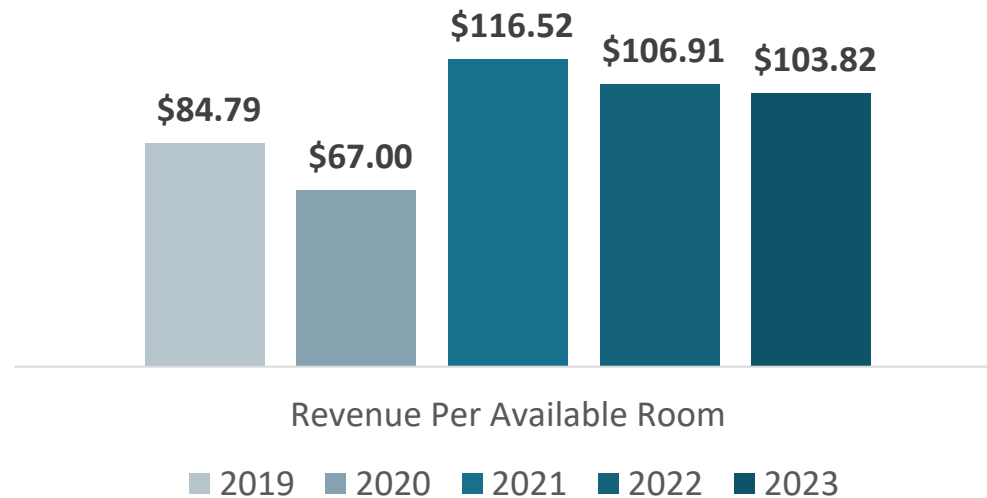
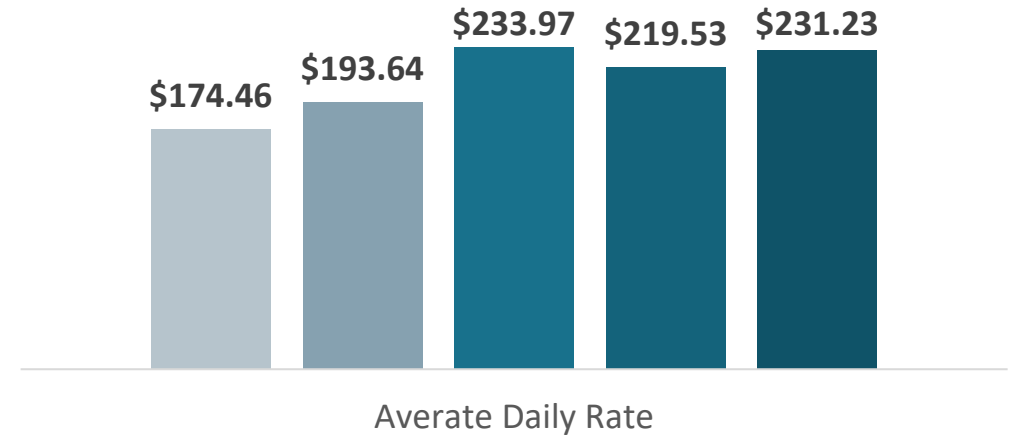
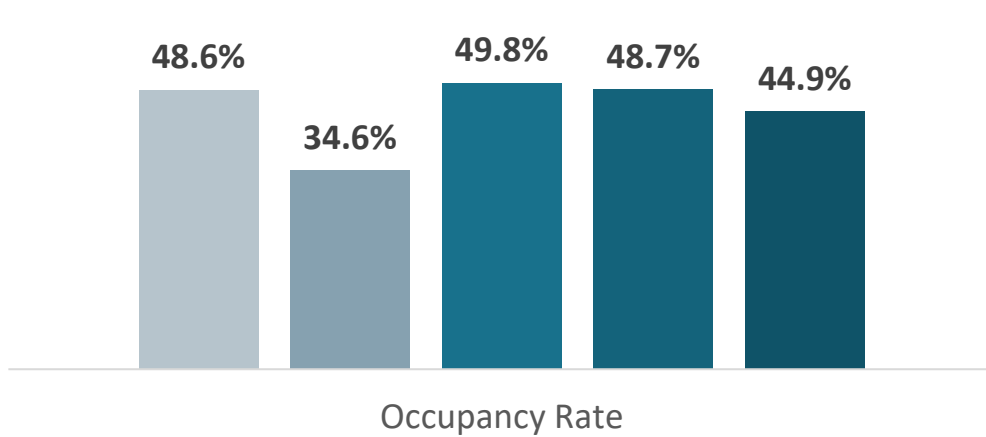


+ 3.1% from 2022

■ Aug-22 ■ Aug-23

¹Source: STR Reports

AUGUST 2019-2023 OVERALL LODGING METRICS^{1,2}



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

² Occupancy, ADR, and RevPAR figures for August 2022 have been adjusted to reflect updated calculation methods.

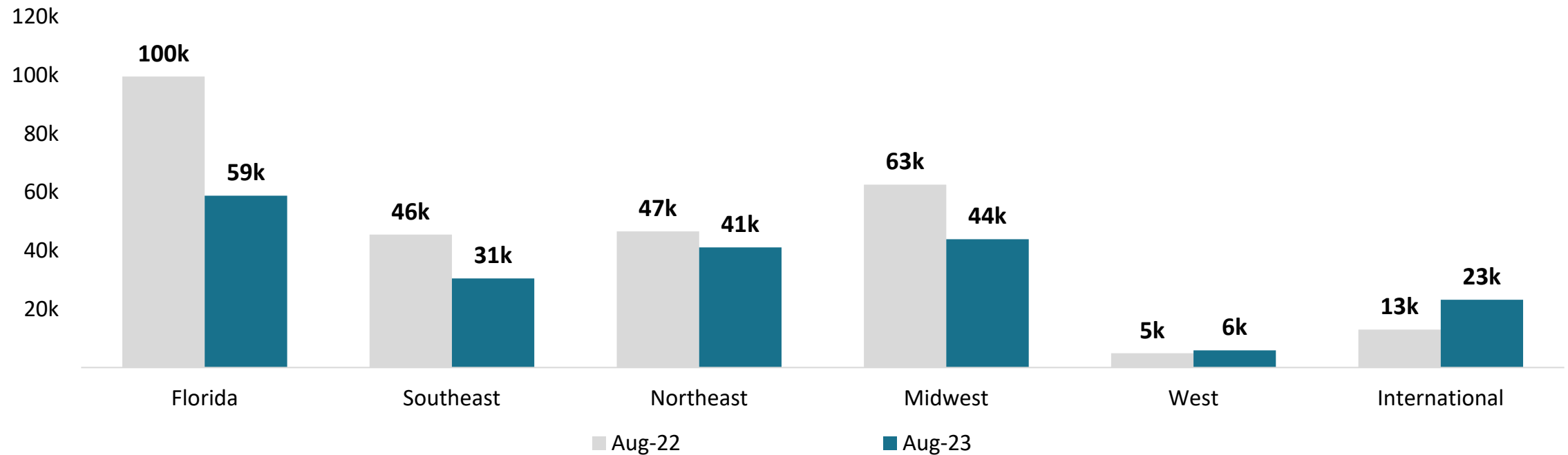
VISITOR ORIGIN

FLORIDA VISITORS

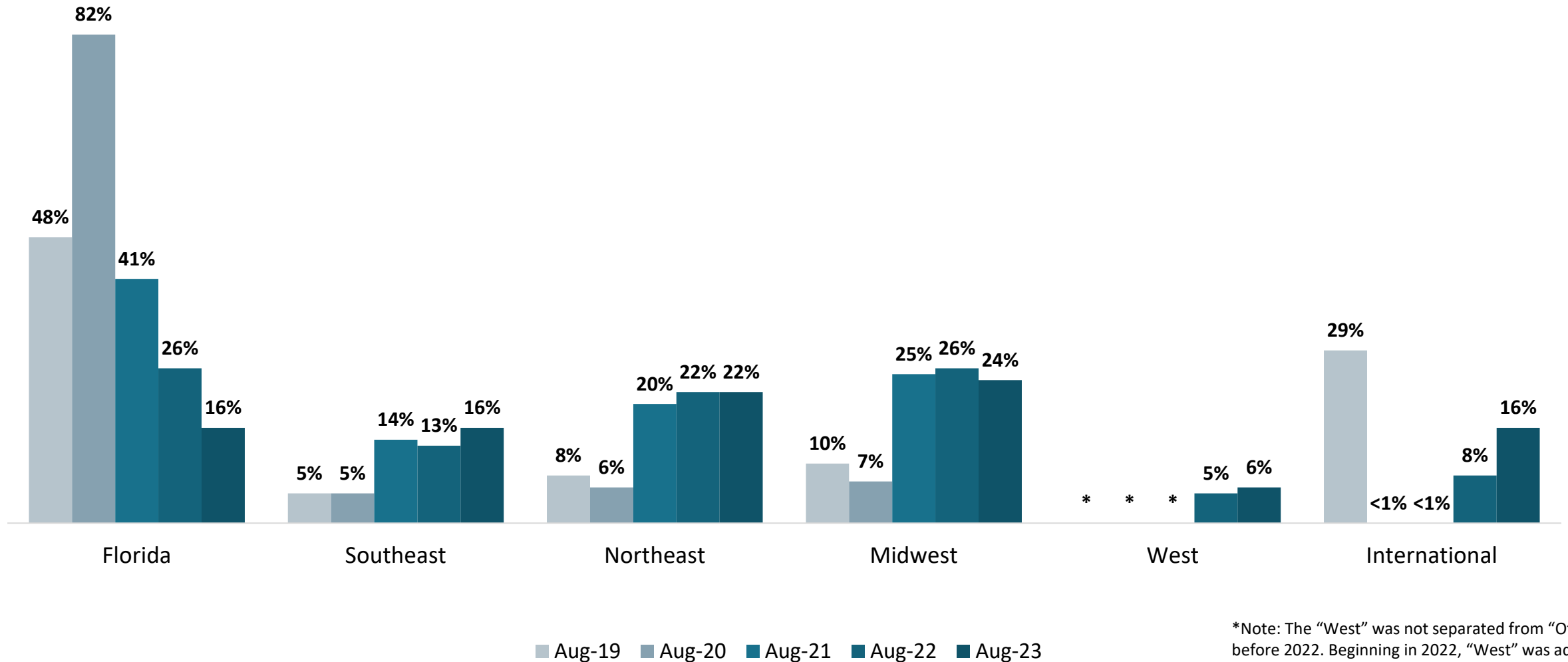
58,800

OUT-OF-STATE VISITORS

144,600



AUGUST 2019-2023 OVERNIGHT VISITOR ORIGIN

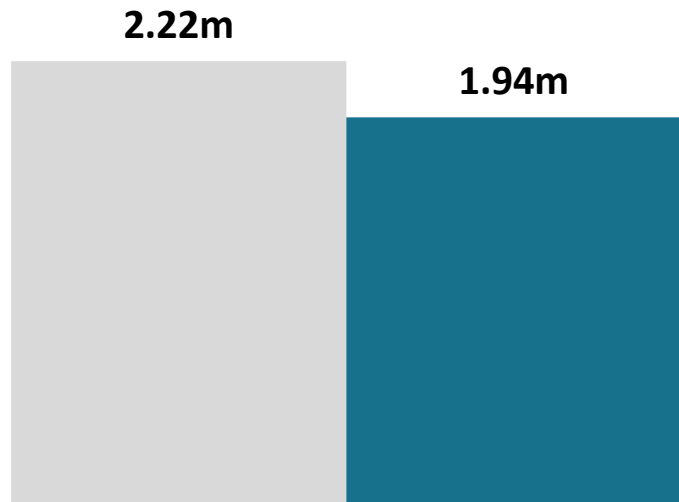


*Note: The "West" was not separated from "Other" before 2022. Beginning in 2022, "West" was added and "Other" was changed to "Other International".

YEAR-TO-DATE VISITATION METRICS

CYTD VISITORS

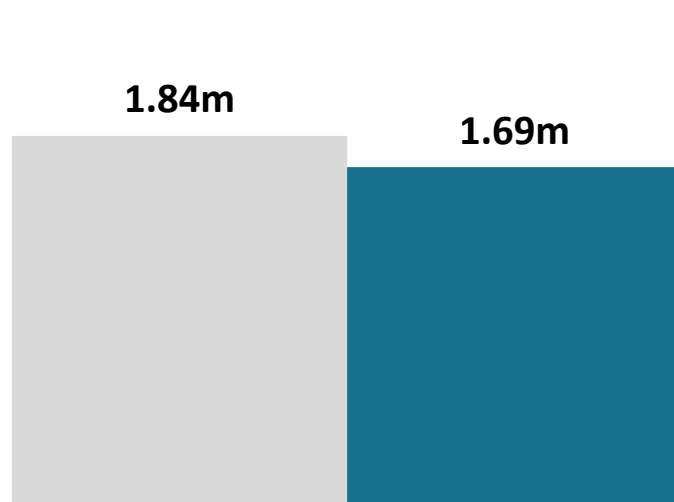
1,937,400



- 12.7% from 2022

CYTD ROOM NIGHTS

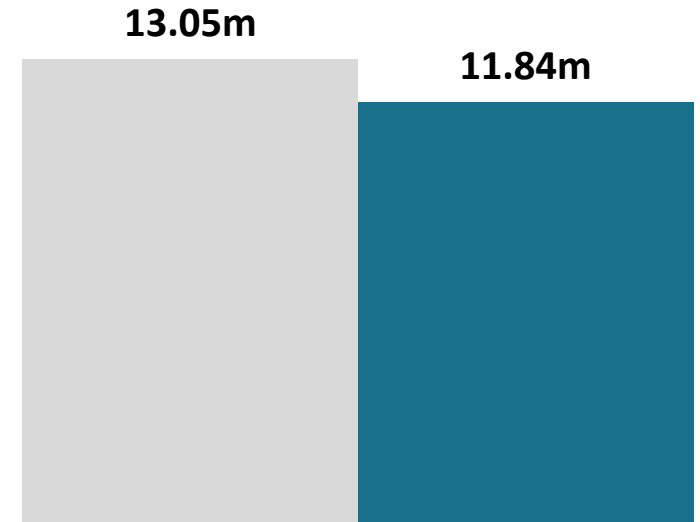
1,686,700



- 8.5% from 2022

CYTD VISITOR DAYS

11,837,600



- 9.3% from 2022

■ Aug-22 ■ Aug-23

CYTD SPENDING & ECONOMIC IMPACT

CYTD DIRECT SPENDING

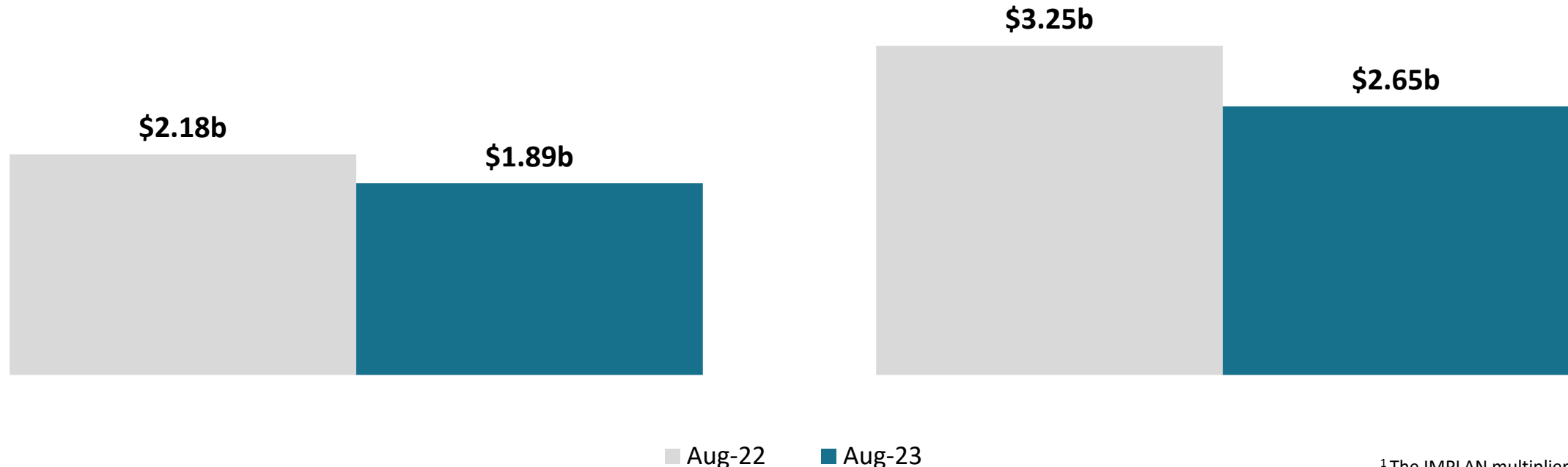
\$1,893,256,800

- 13.1% from 2022

CYTD ECONOMIC IMPACT

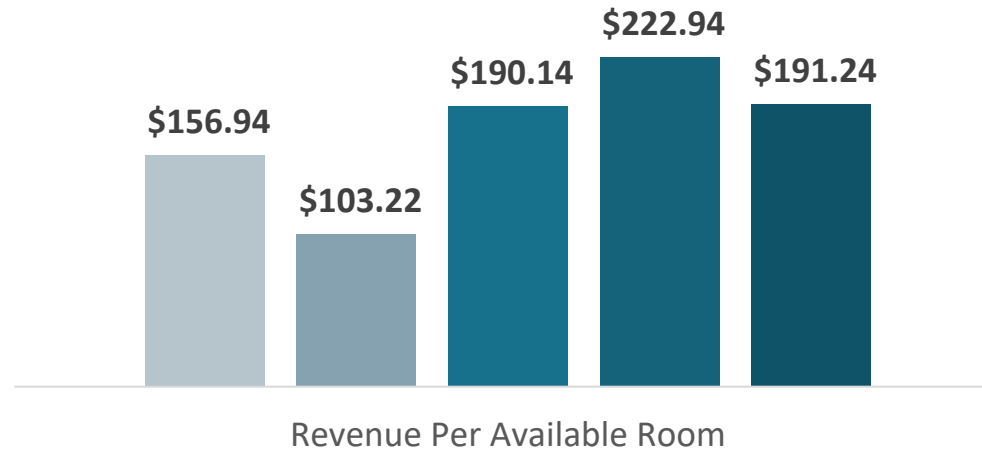
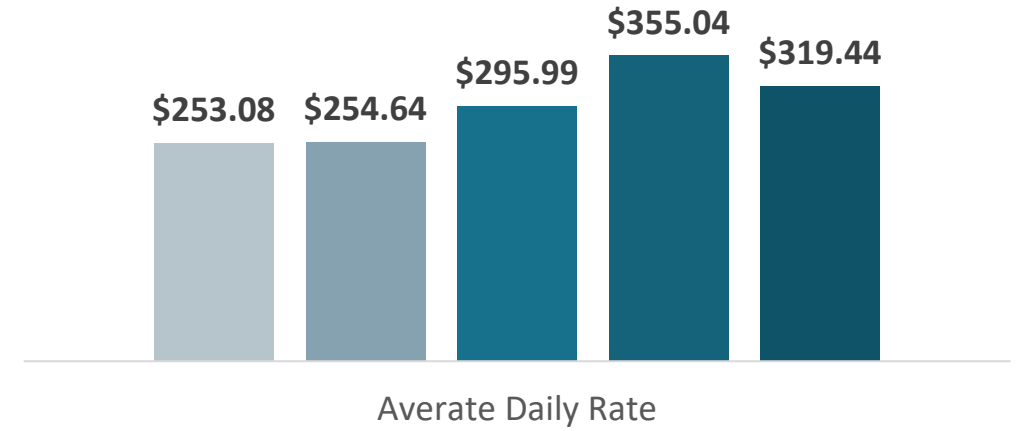
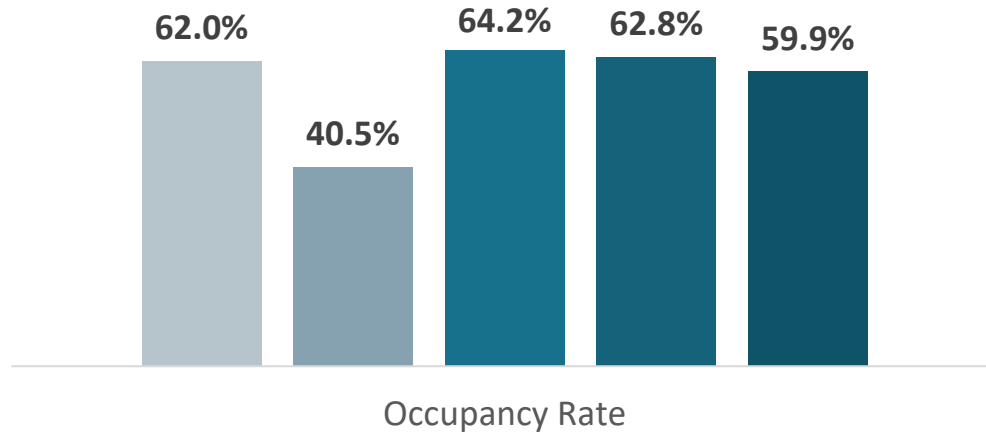
\$2,651,903,600

- 18.4% from 2022¹



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

CYTD 2019-2023 OVERALL LODGING METRICS^{1,2}

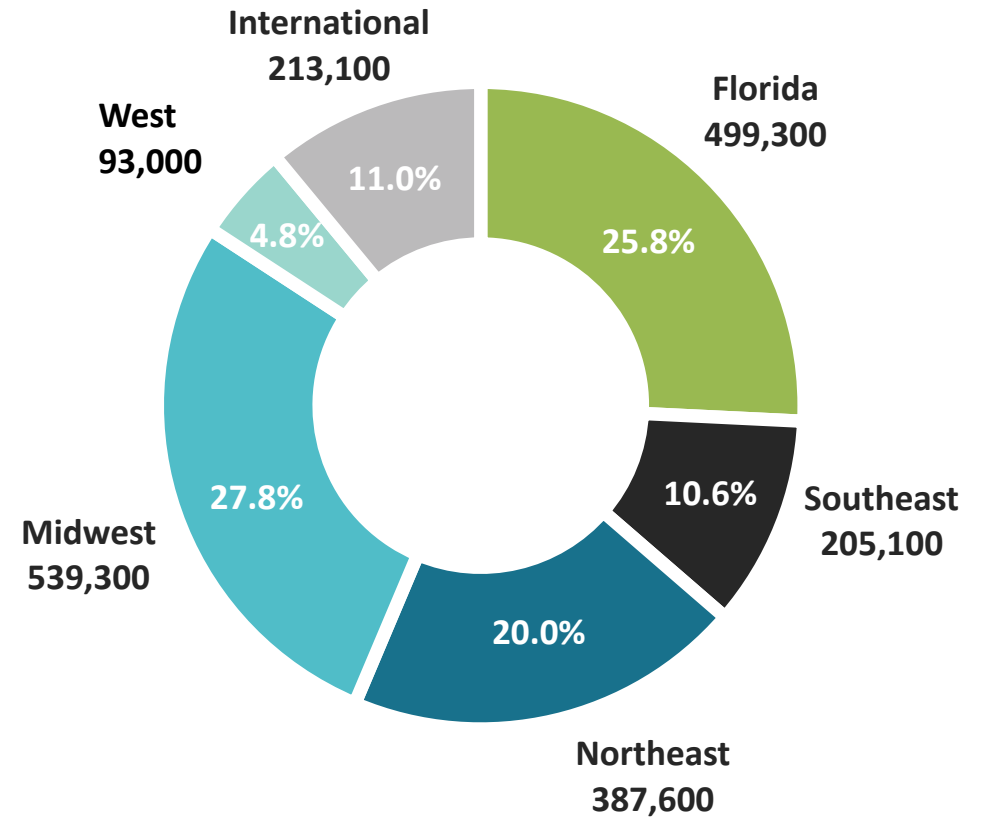


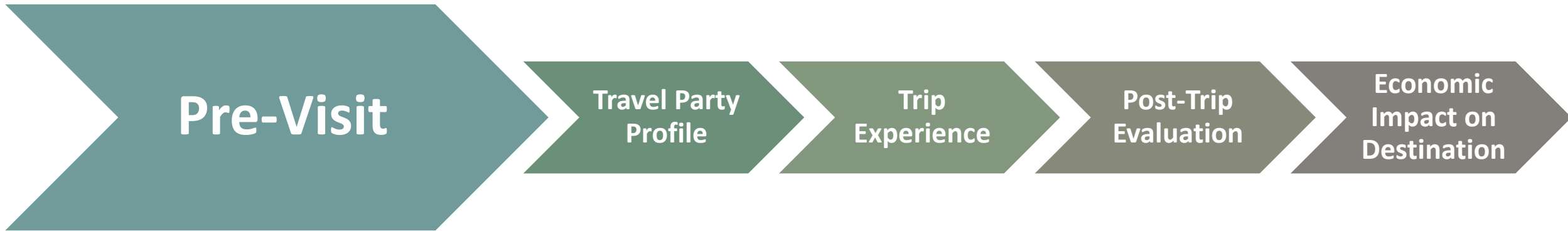
■ 2019 ■ 2020 ■ 2021 ■ 2022 ■ 2023

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

CYTD 2023 VISITOR ORIGIN MARKETS

Region	CYTD 2022		CYTD 2023		Percent Change (Δ%)	
	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	505,800	22.8%	499,400	25.8%	-1.3%	13.0%
Southeast	267,300	12.1%	205,100	10.6%	-23.3%	-12.2%
Northeast	510,800	23.0%	387,600	20.0%	-24.1%	-13.2%
Midwest	636,500	28.7%	539,300	27.8%	-15.3%	-3.1%
West	126,500	5.7%	93,000	4.8%	-26.5%	-15.9%
Canada	50,600	2.3%	86,000	4.4%	70.0%	94.5%
Europe	71,000	3.2%	75,800	3.9%	6.9%	22.3%
C/S America	19,000	0.9%	29,400	1.5%	54.7%	77.0%
Other	29,200	1.3%	21,900	1.1%	-25.0%	-14.2%
Total	2,216,700	100.0%	1,937,400	100.0%		

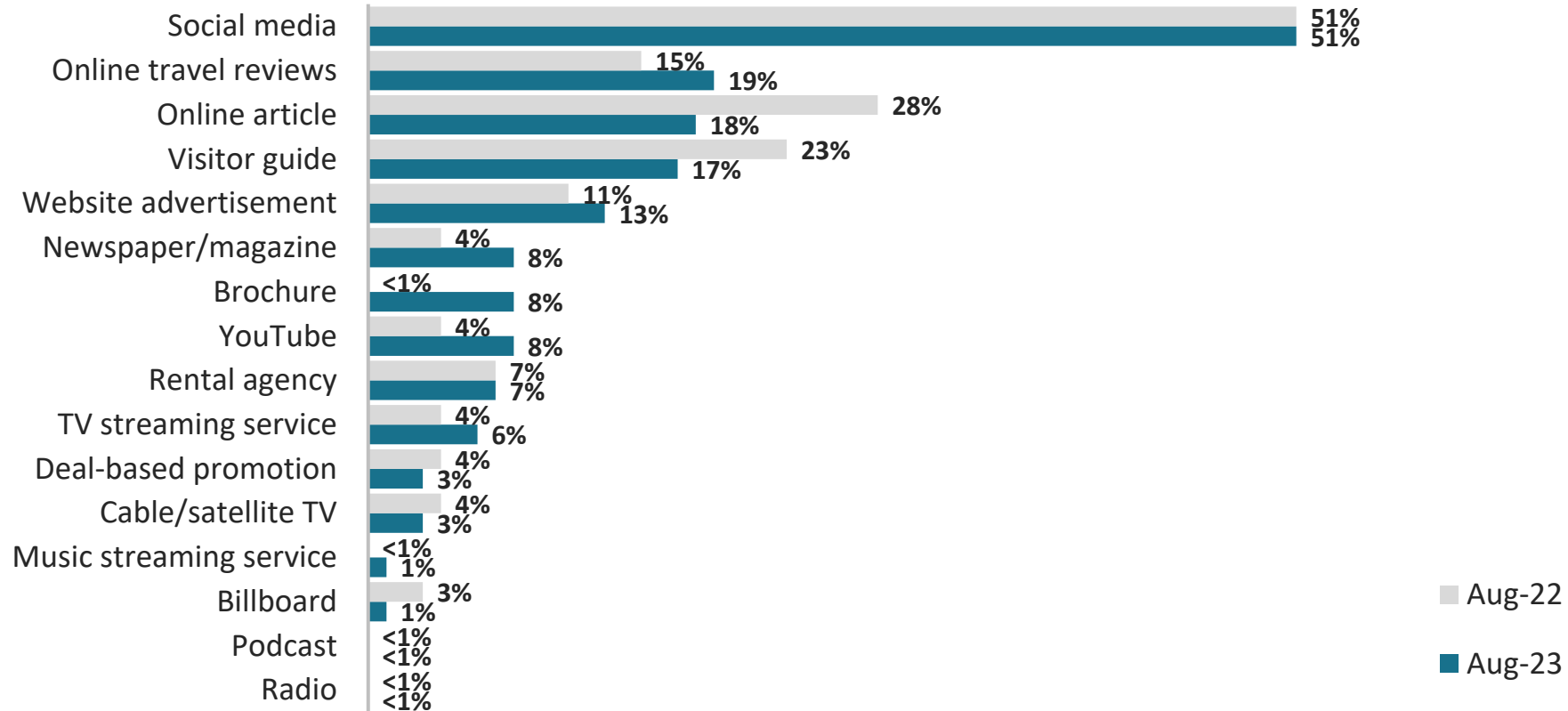




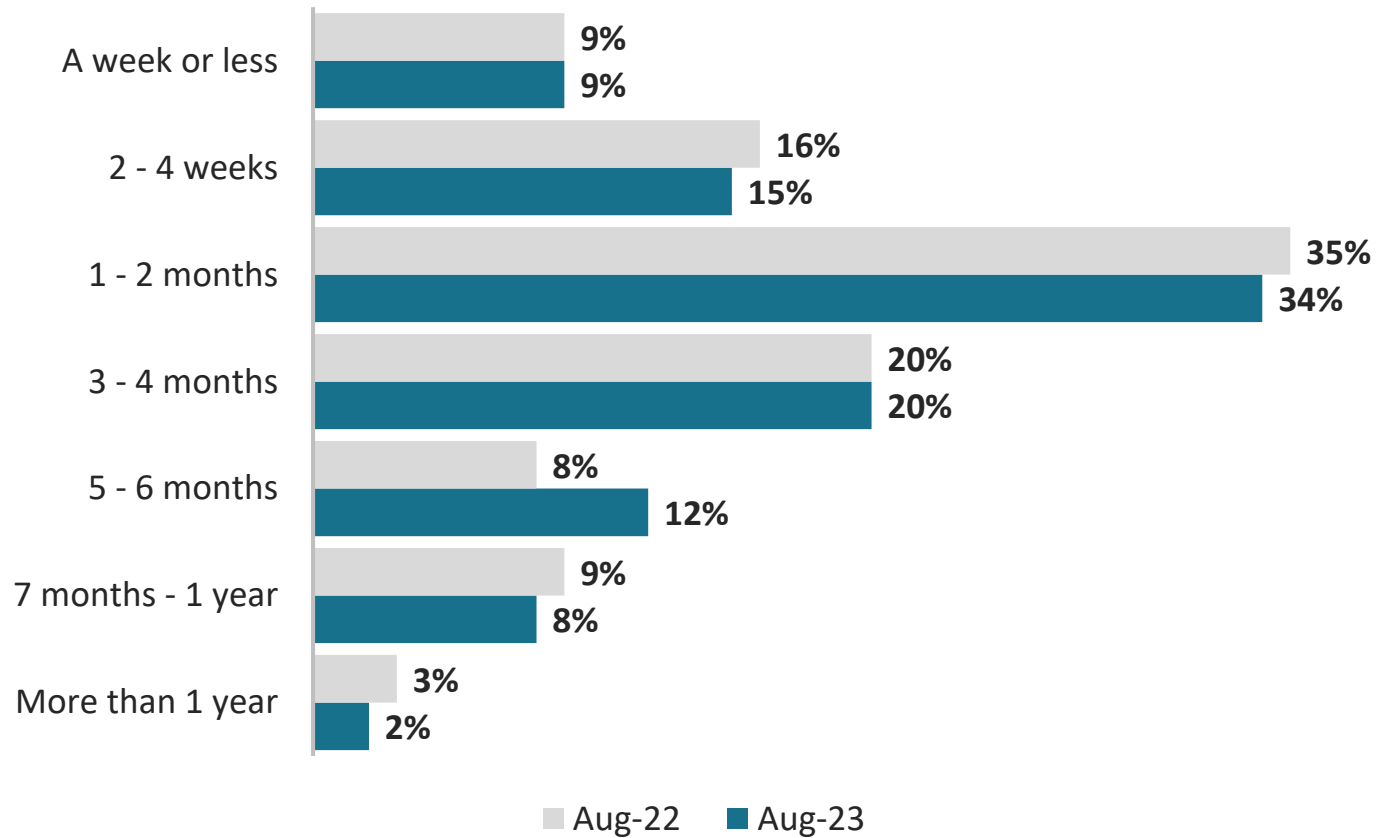
EXPOSURE TO ADVERTISING



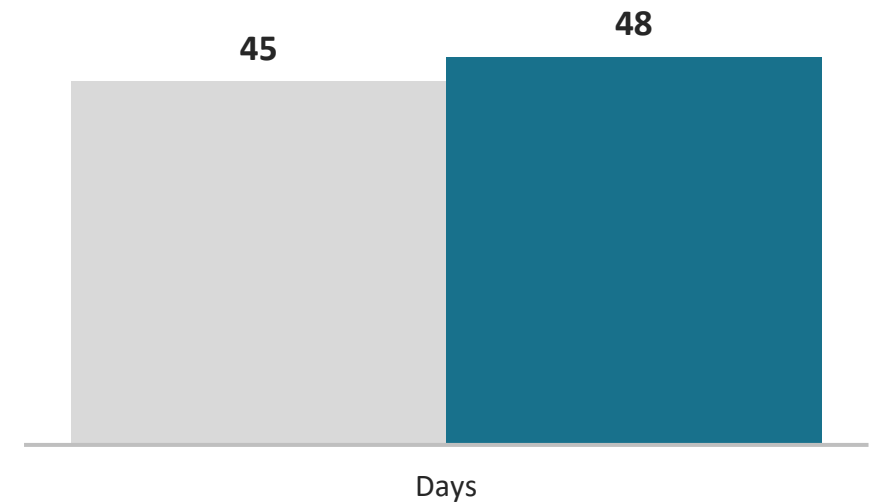
Base: % who recalled being exposed to ads prior to their trip



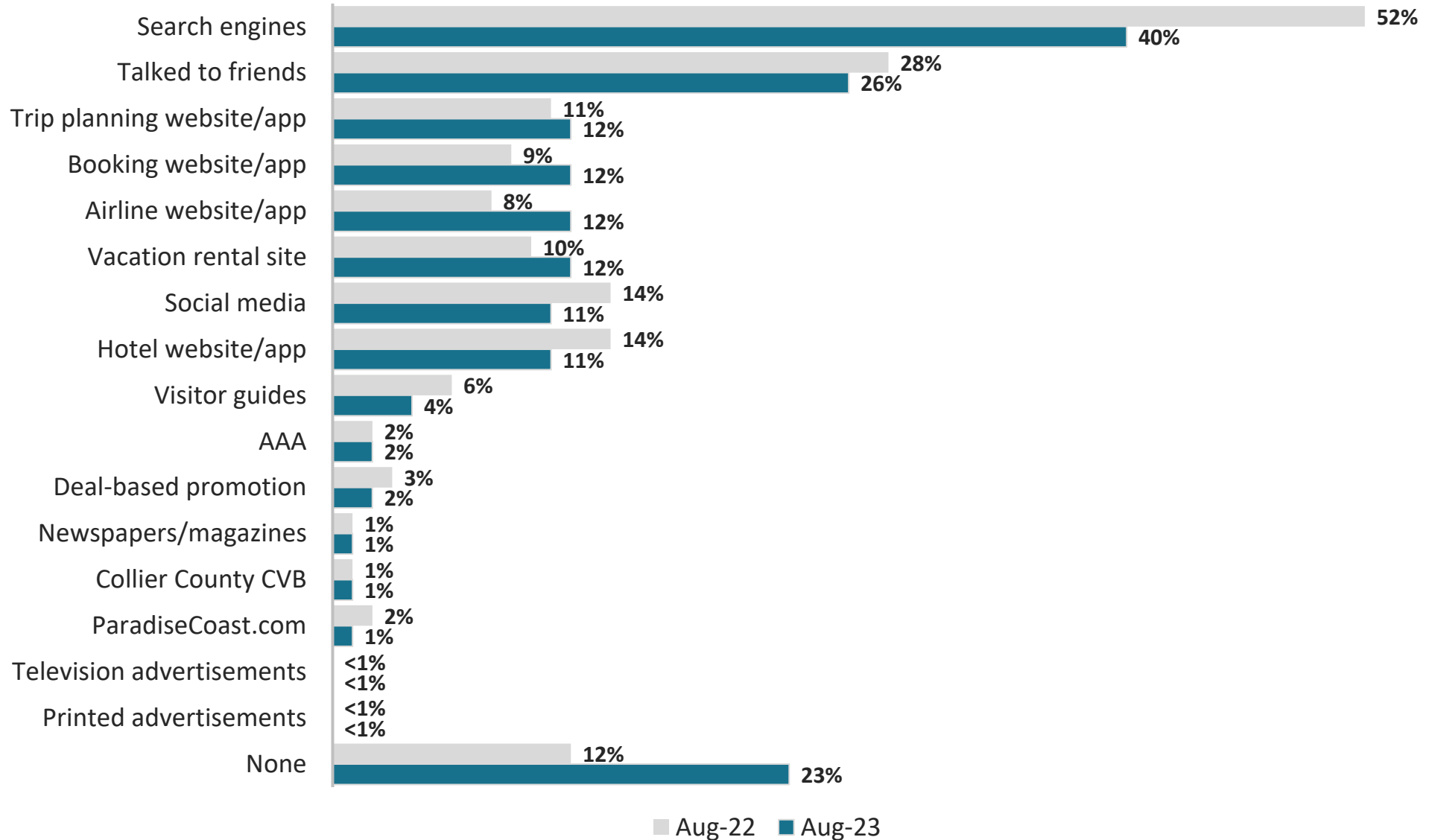
TRIP PLANNING CYCLE



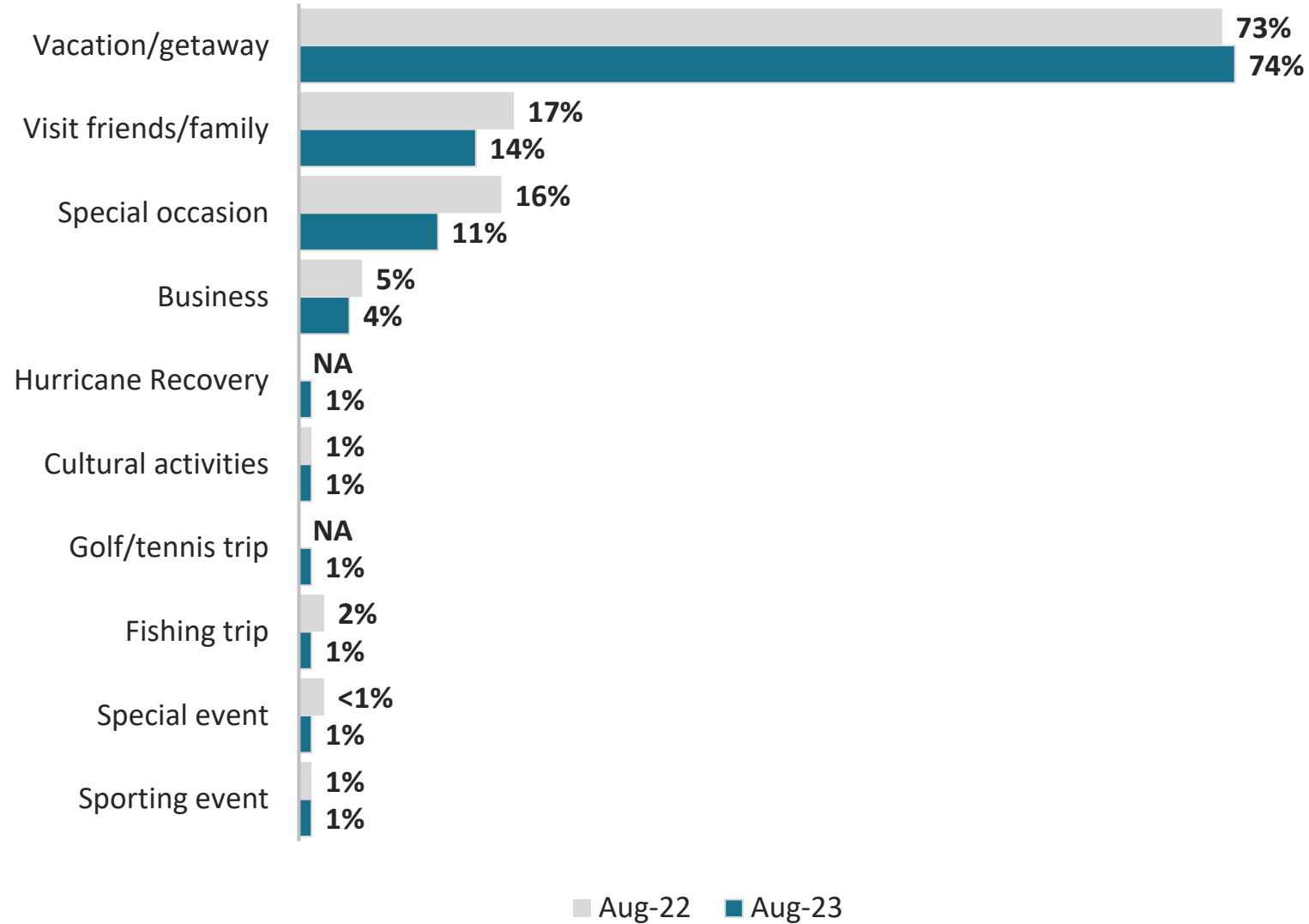
Median Trip Planning Time



TRIP PLANNING SOURCES

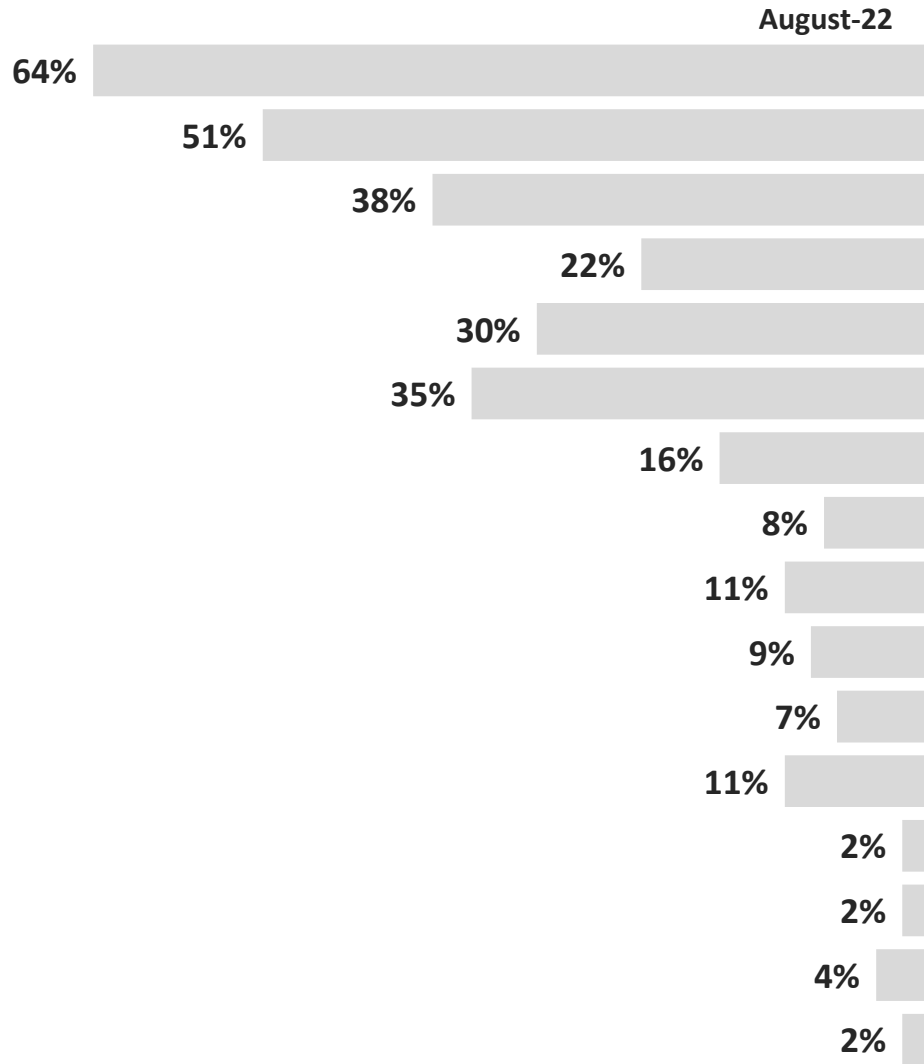


REASONS FOR VISITING¹

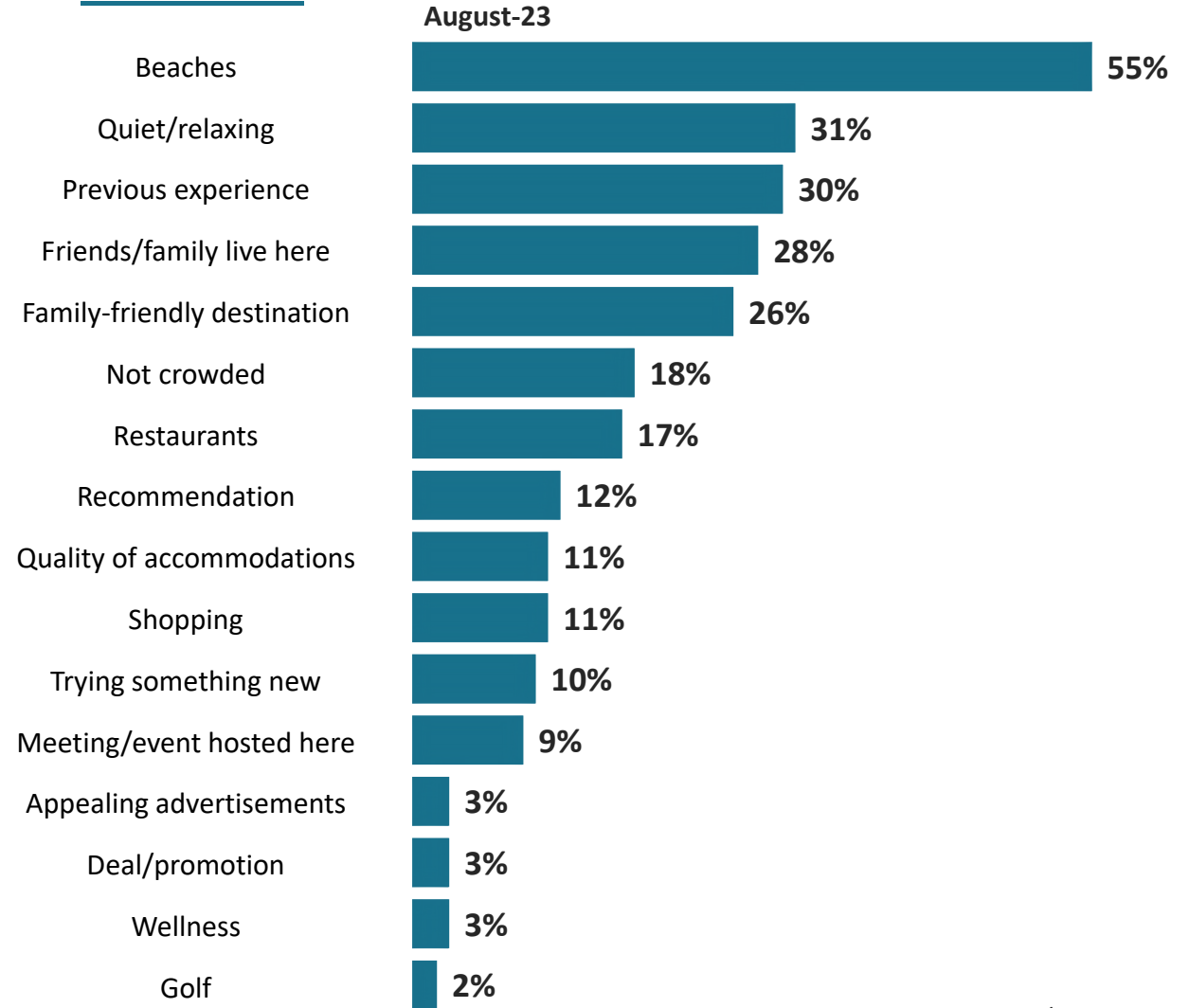


¹ Multiple responses permitted.

REASONS FOR CHOOSING AREA

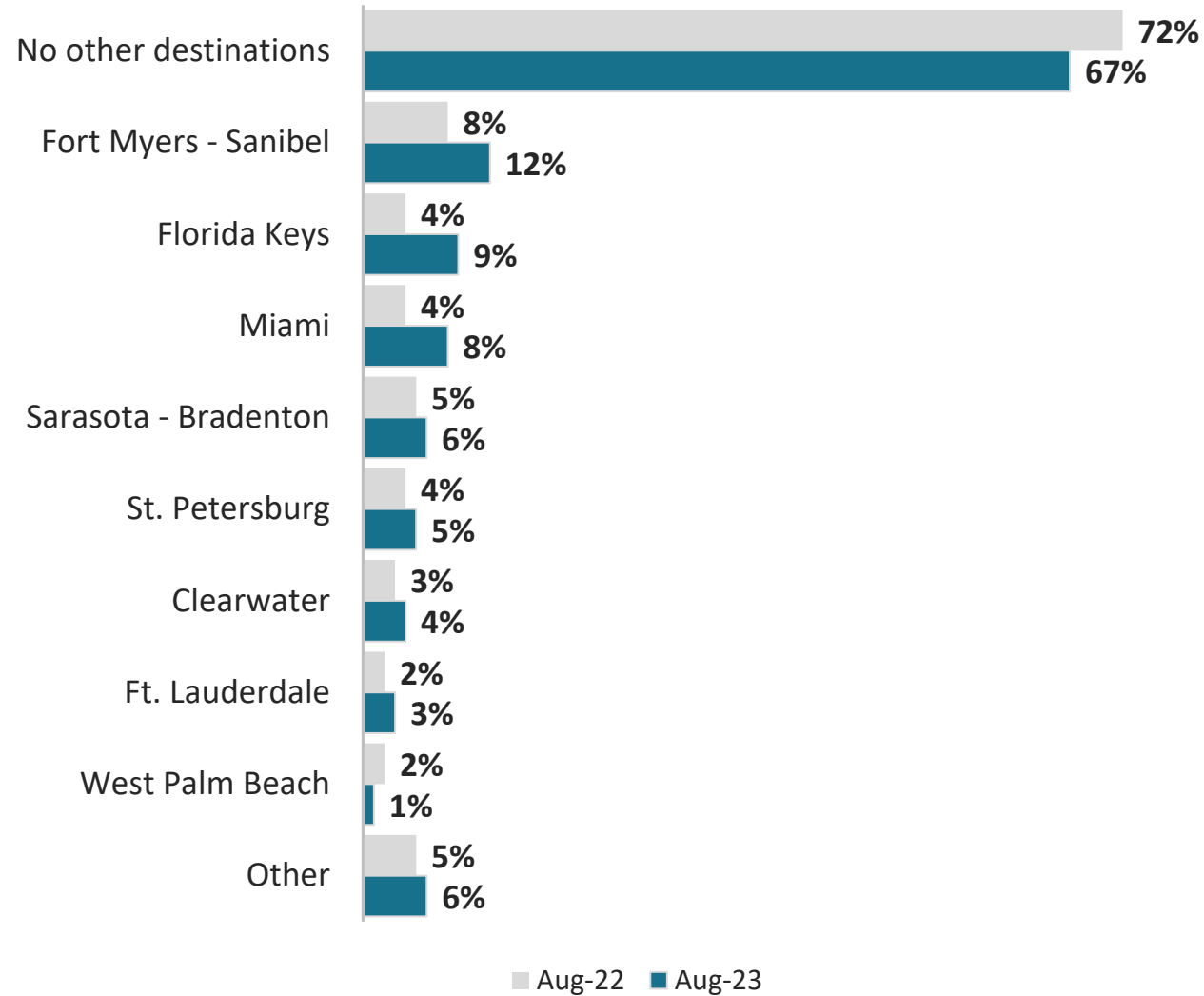


Reasons¹



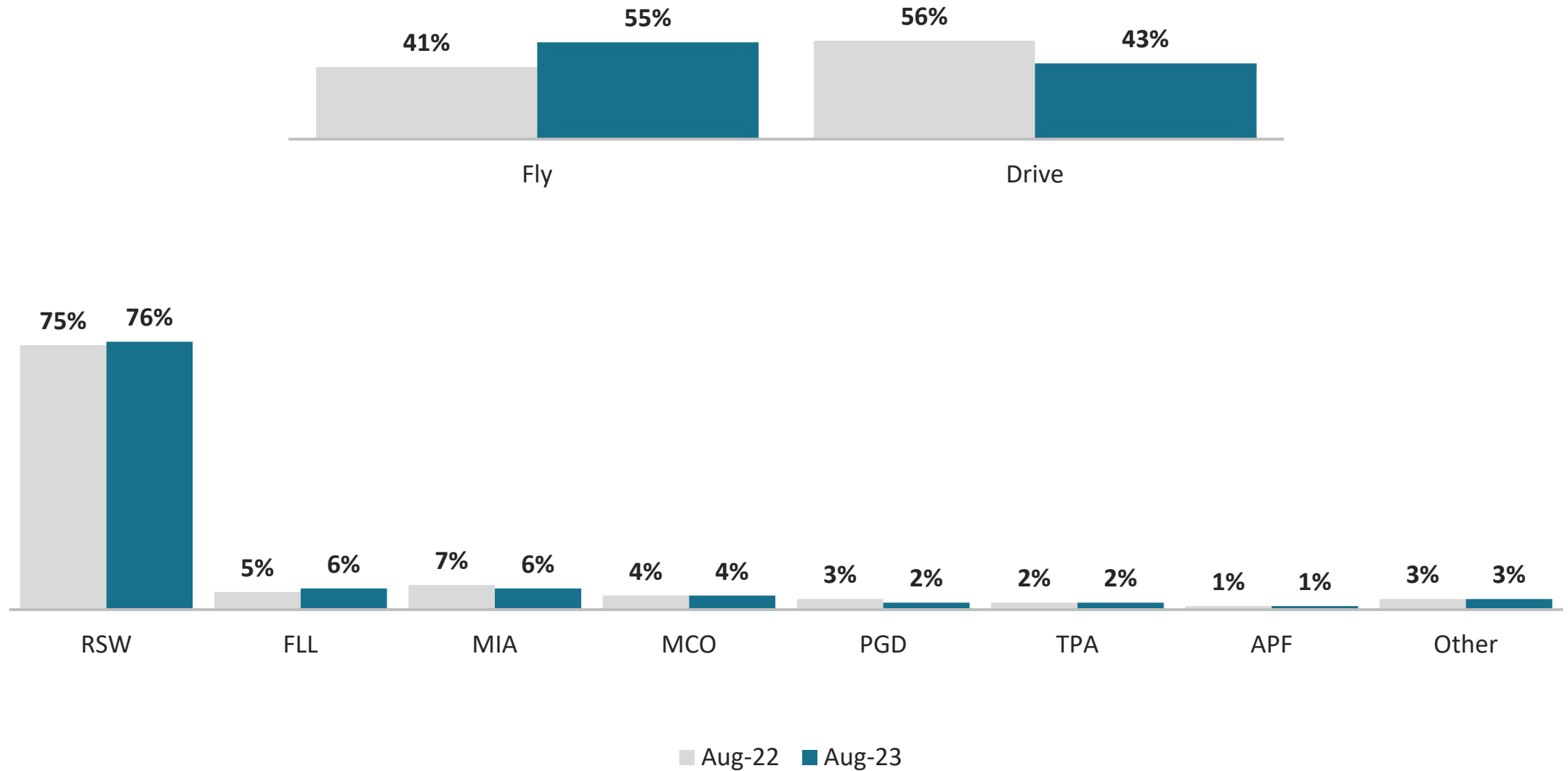
¹Multiple responses permitted.

OTHER DESTINATIONS CONSIDERED¹

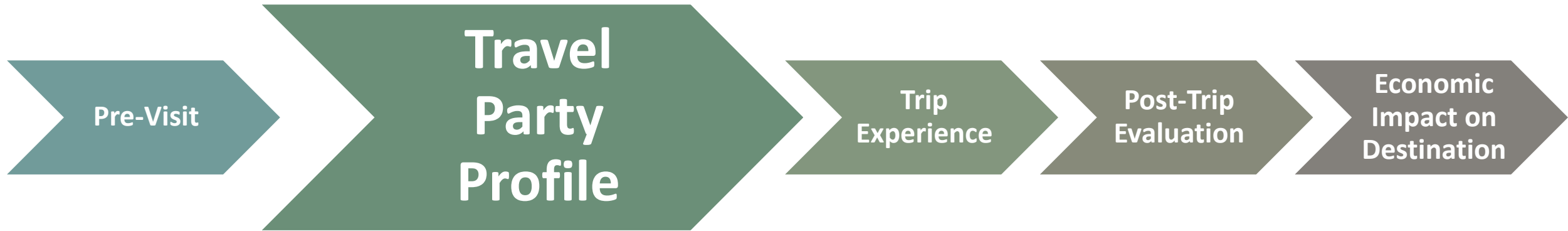


¹ Multiple responses permitted.

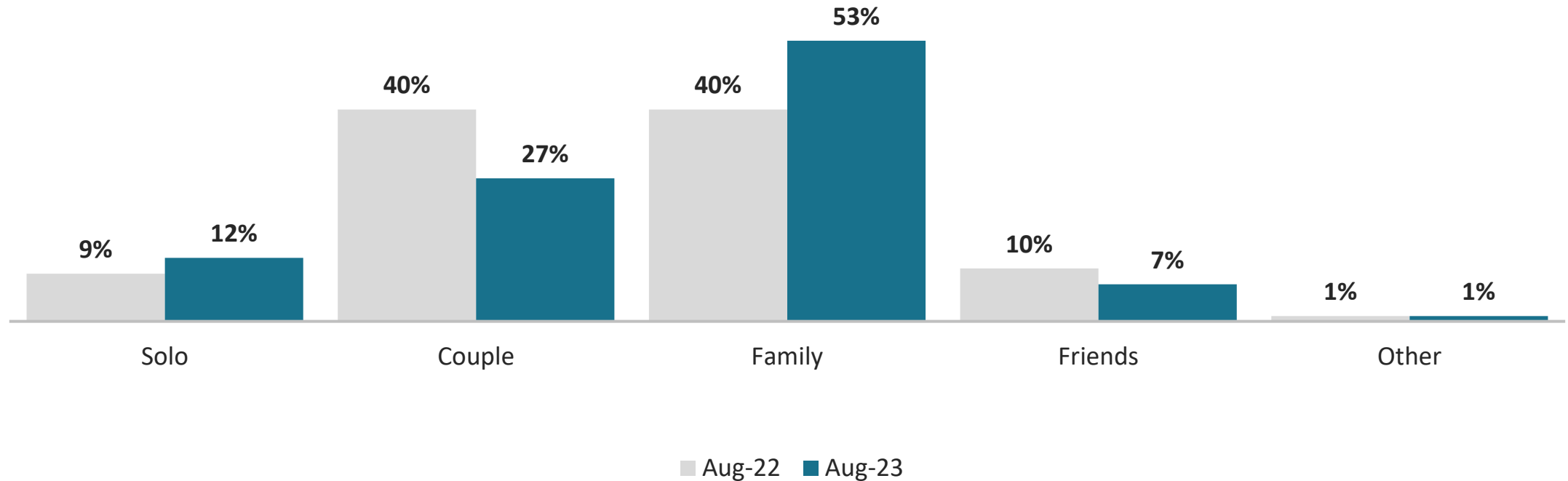
TRANSPORTATION METHODS



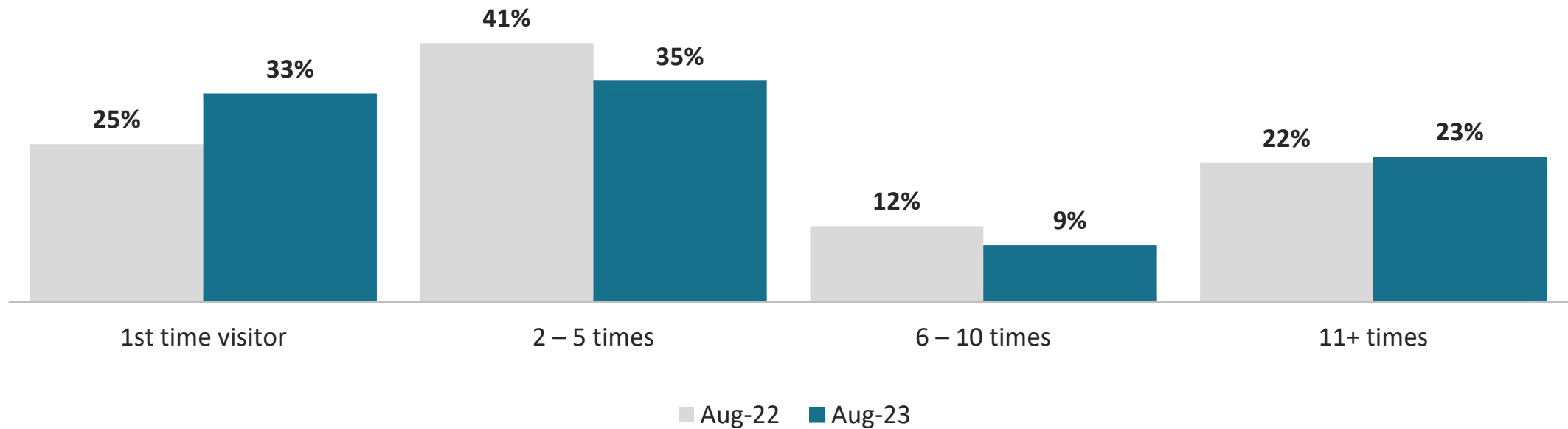
VISITOR JOURNEY: TRAVEL PARTY PROFILE



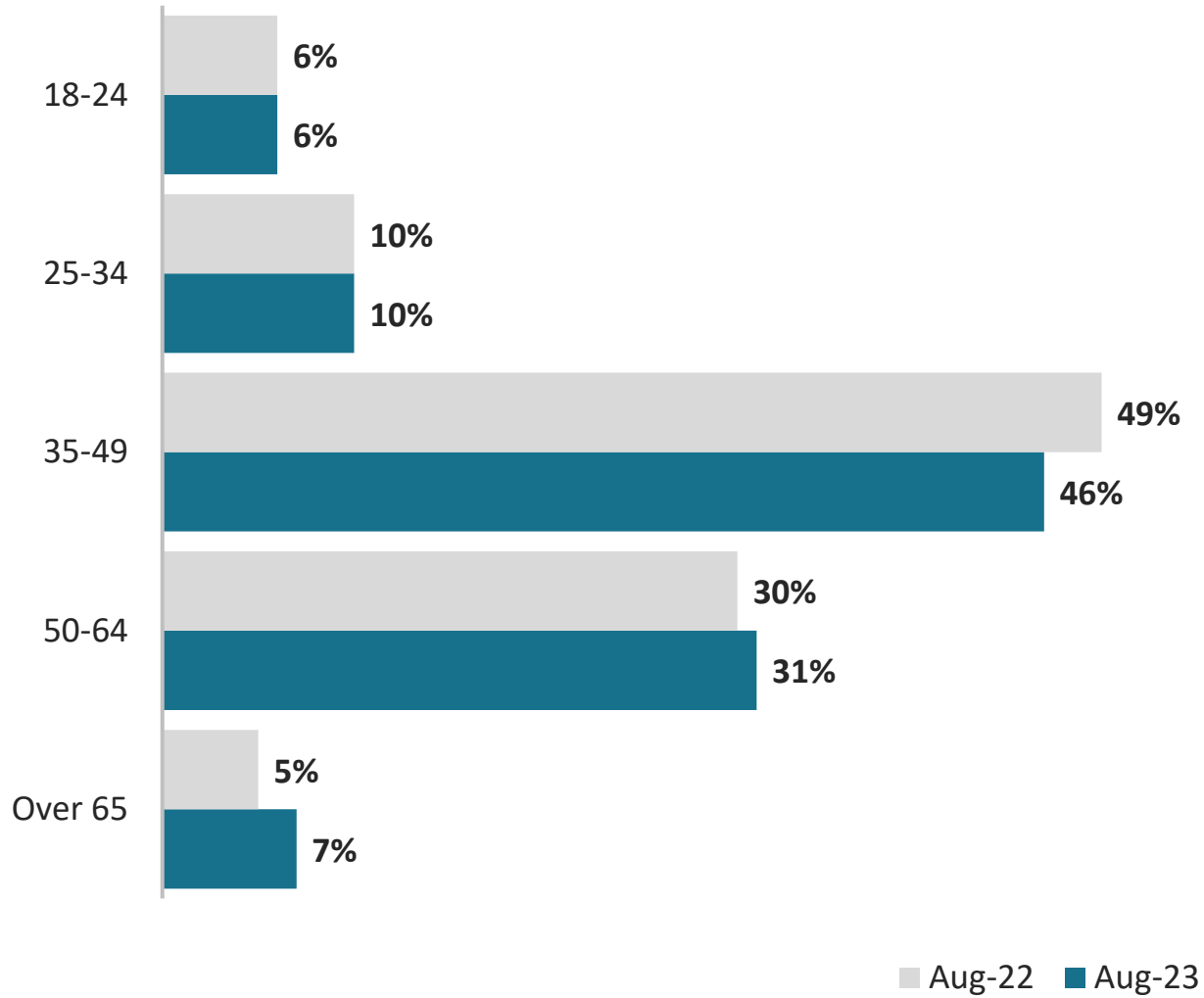
TRAVEL PARTY COMPOSITION



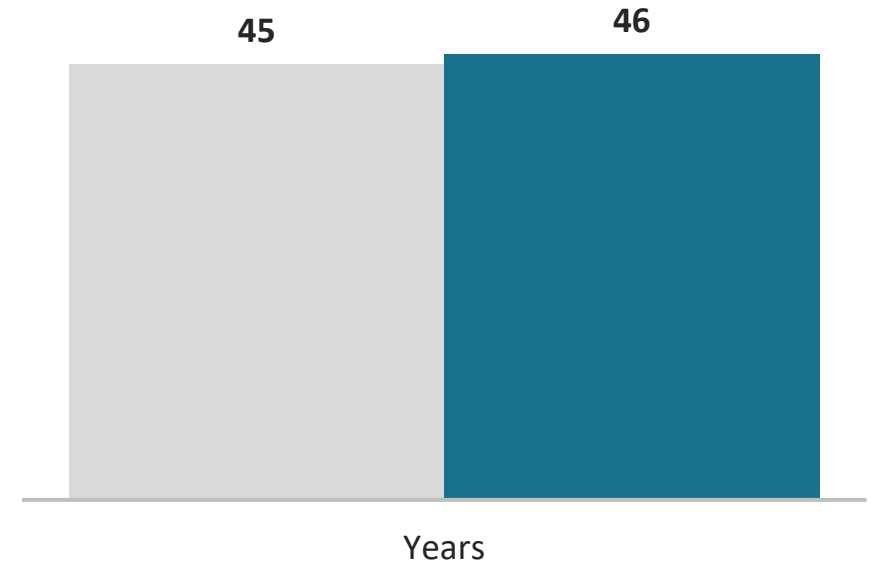
PREVIOUS VISITS



Age

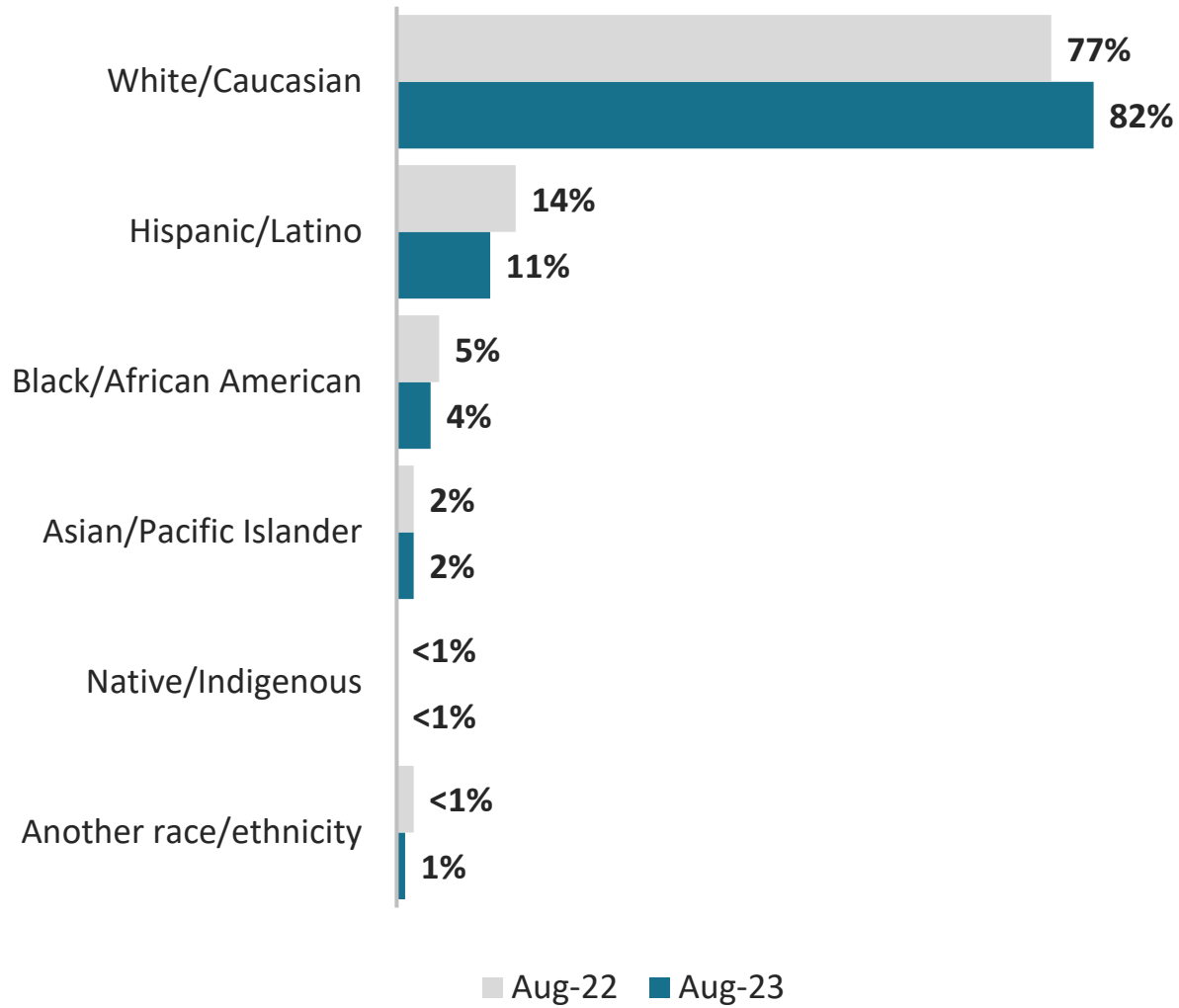


Median Age

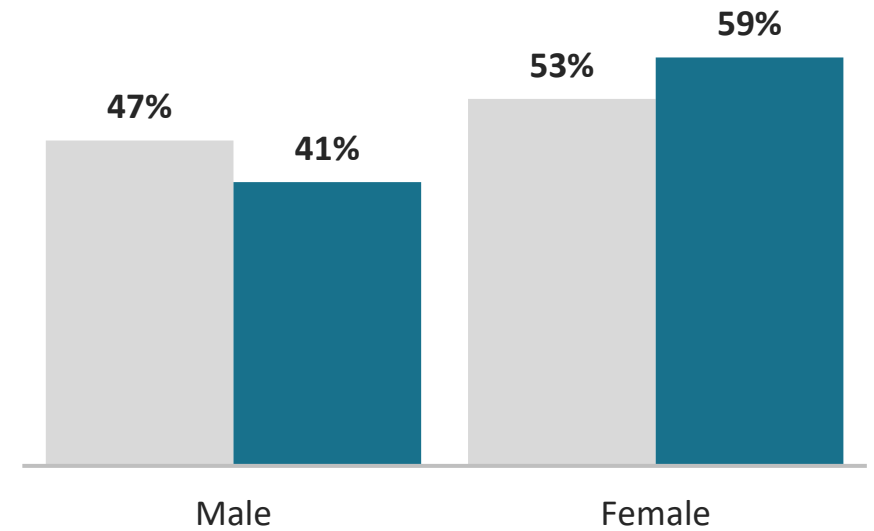


VISITOR RACE & GENDER

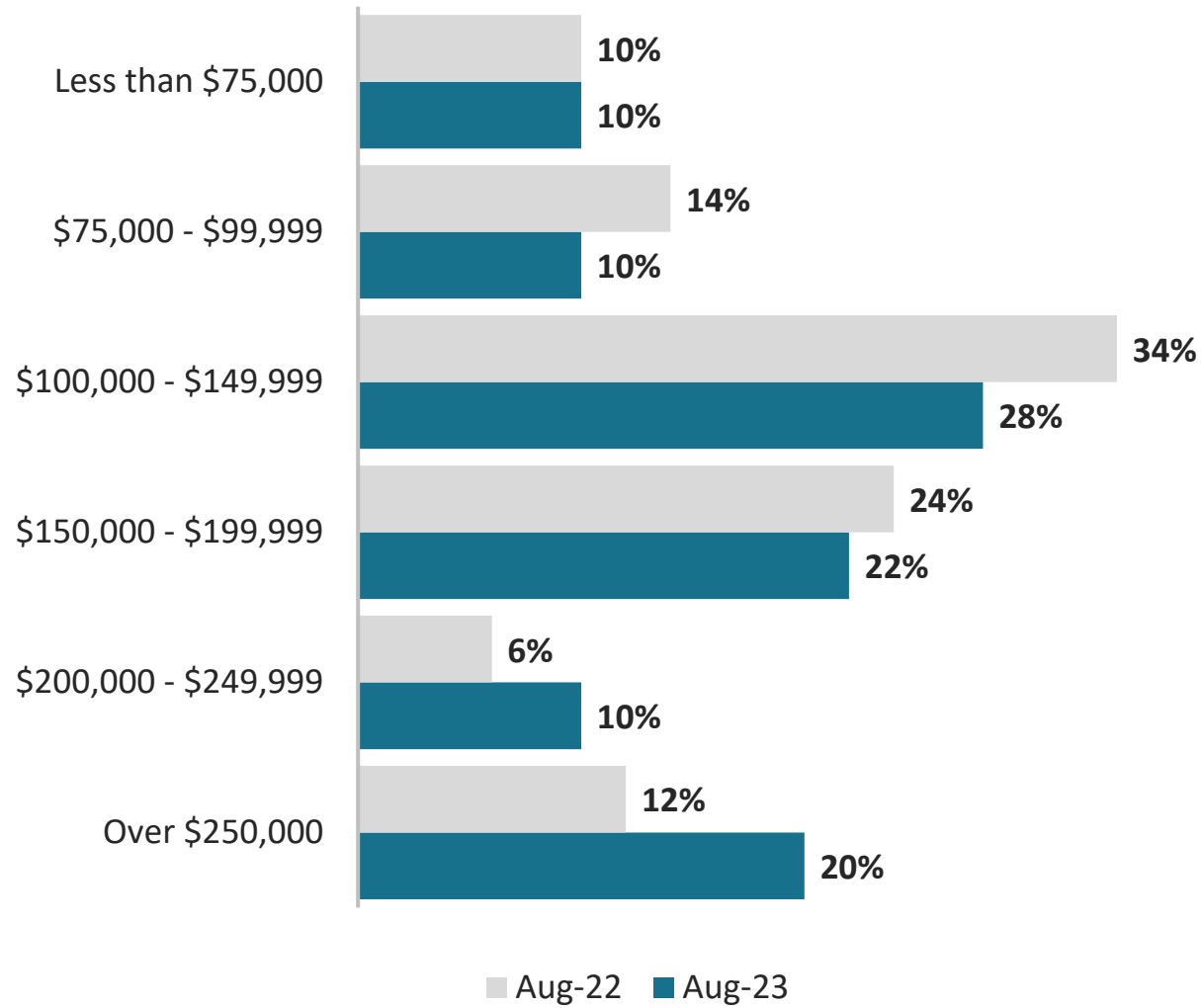
Race



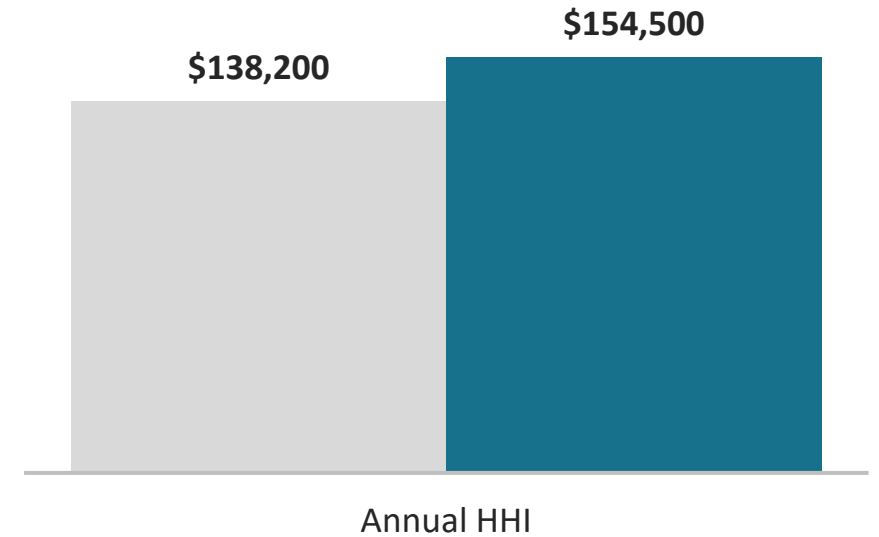
Gender



Income



Median Household Income



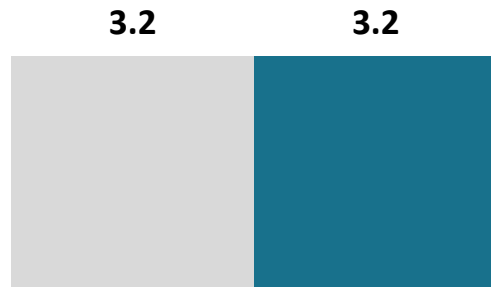
VISITOR JOURNEY: TRIP EXPERIENCE



TRIP CHARACTERISTICS

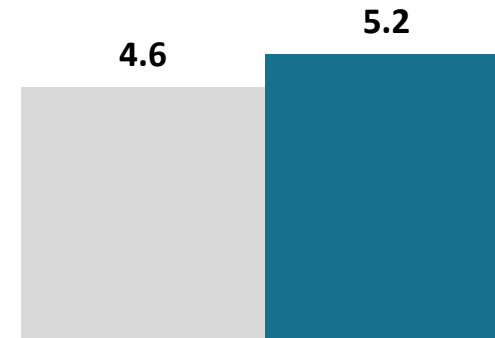
TRAVEL PARTY SIZE

3.2



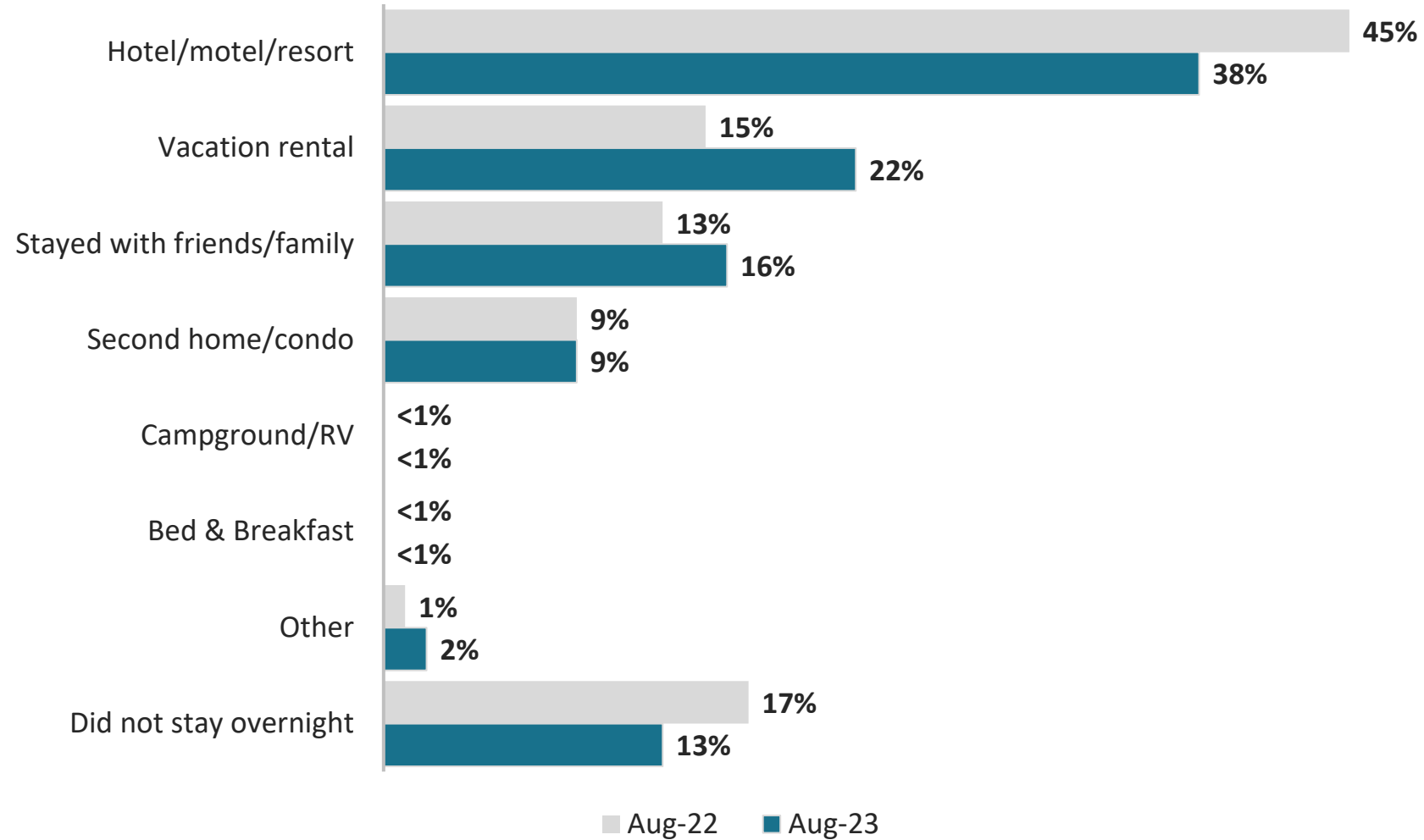
NIGHTS STAYED

5.2

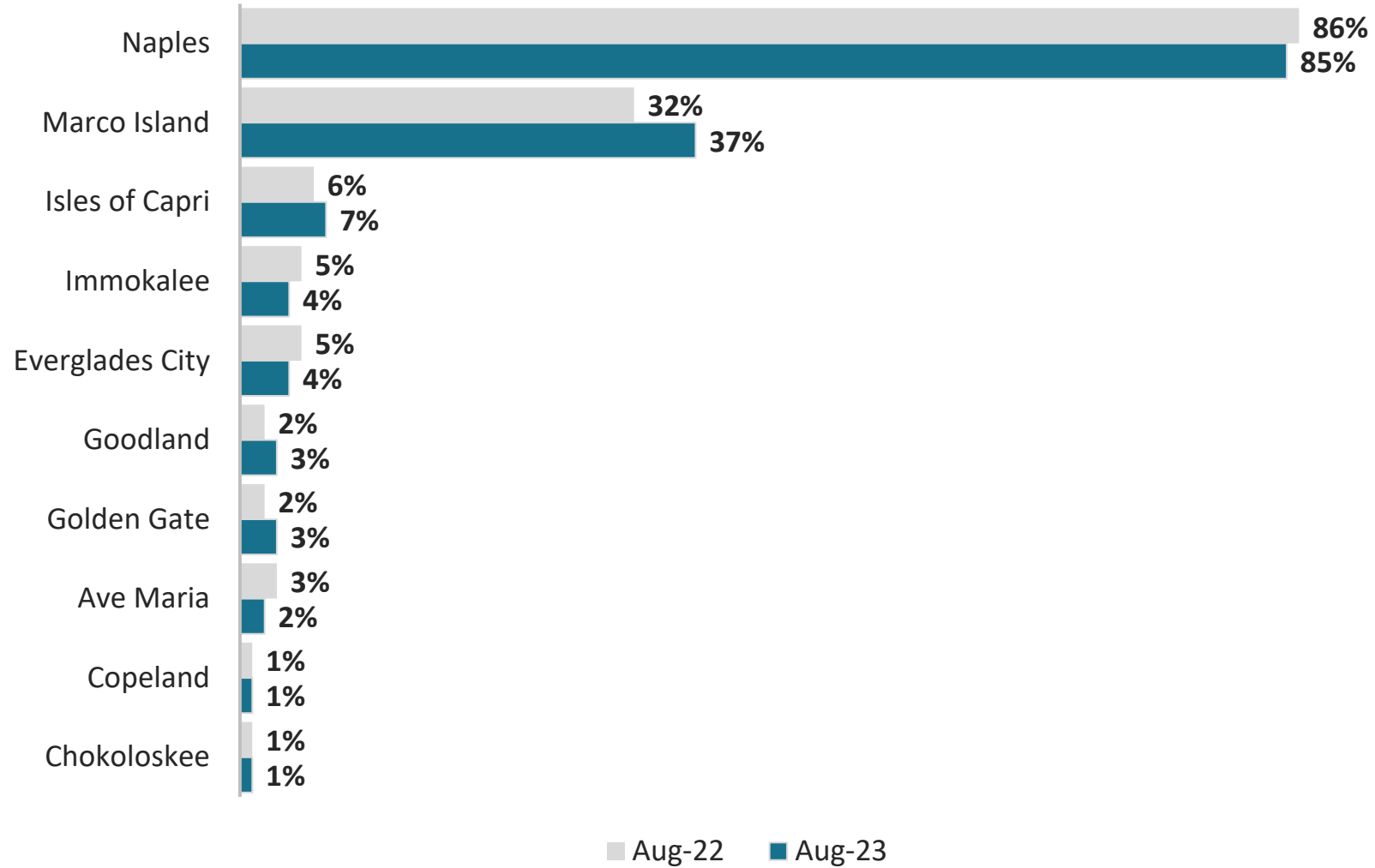


■ Aug-22 ■ Aug-23

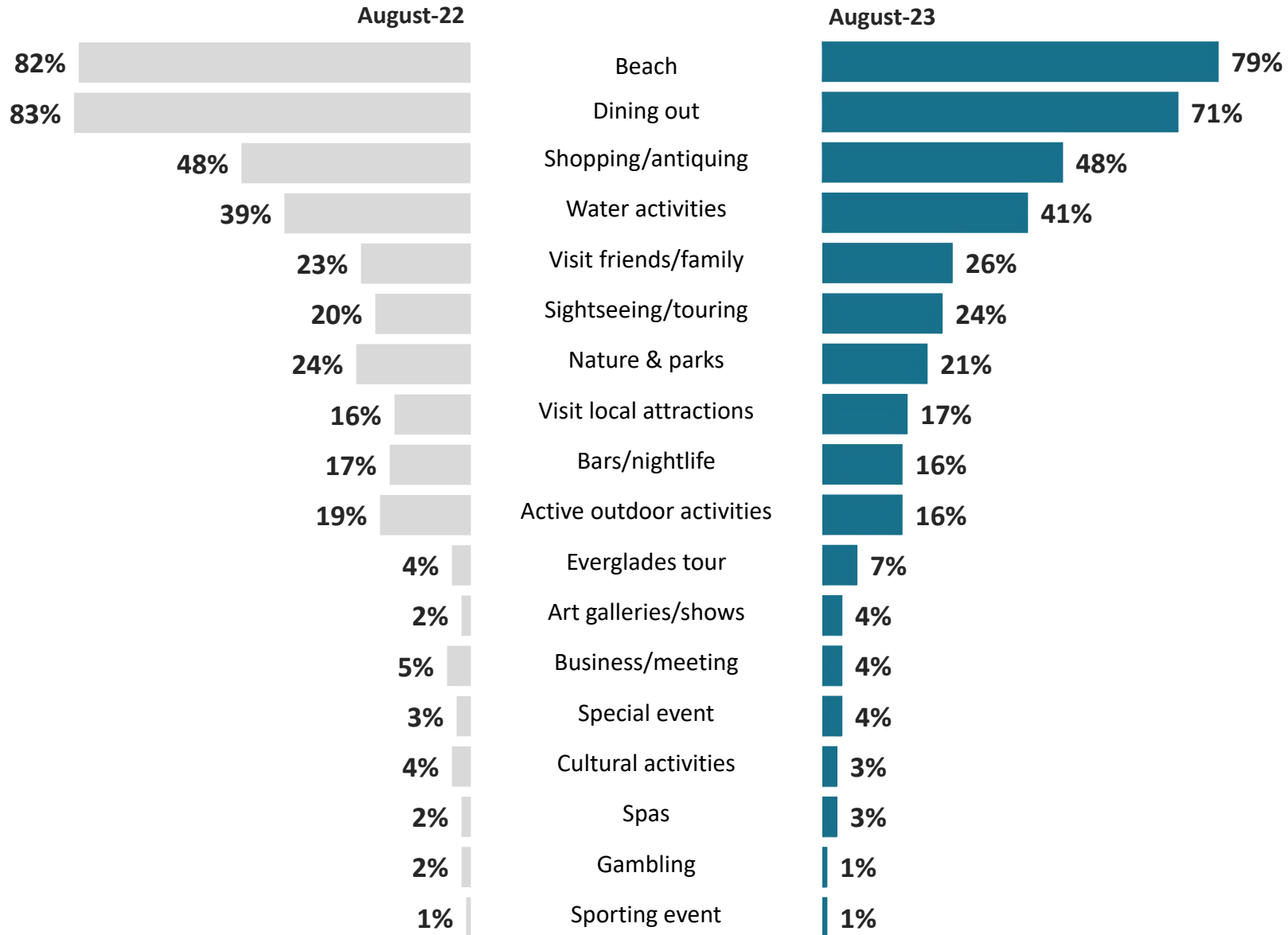
TYPE OF ACCOMMODATIONS



AREAS VISITED

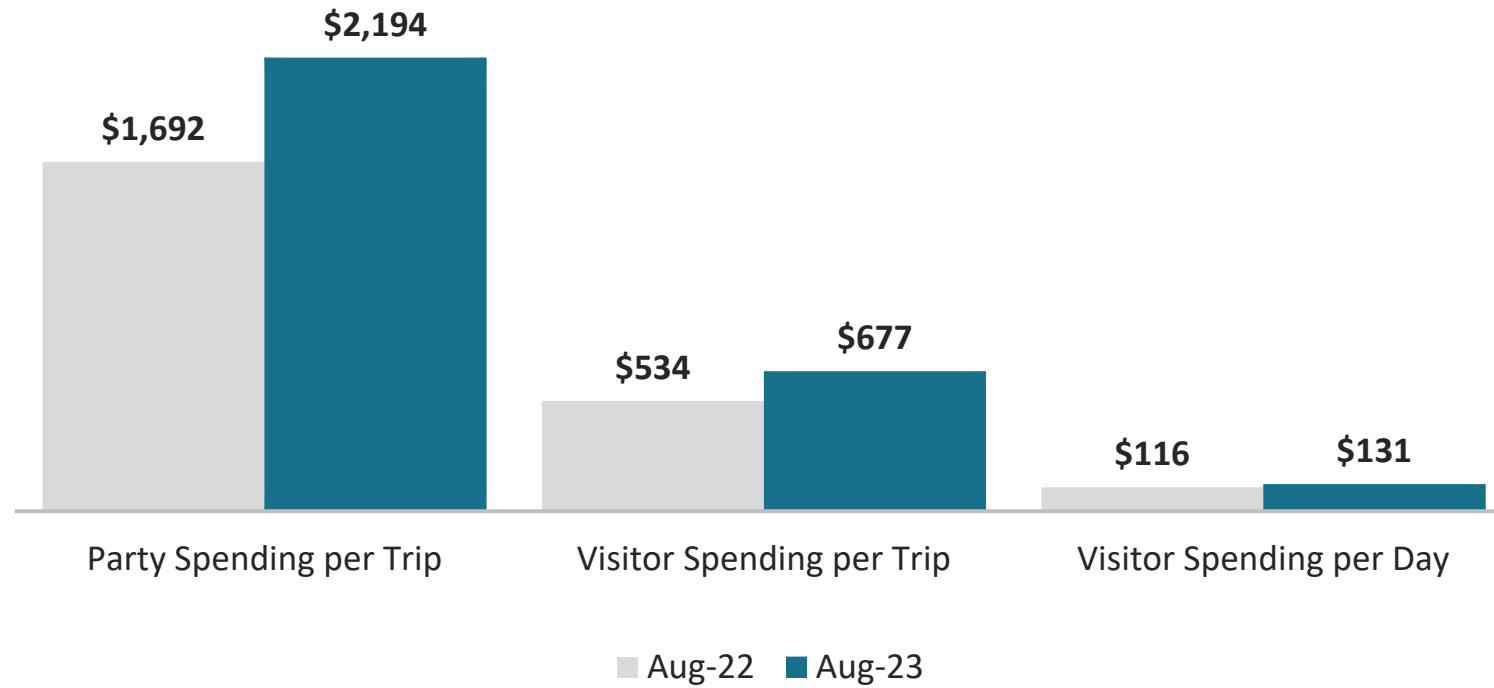


TRIP ACTIVITIES



¹ Multiple responses permitted.

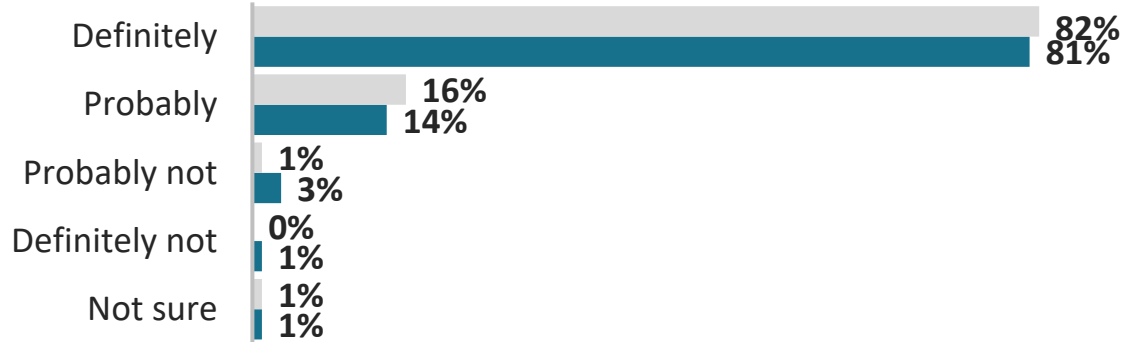
VISITOR SPENDING



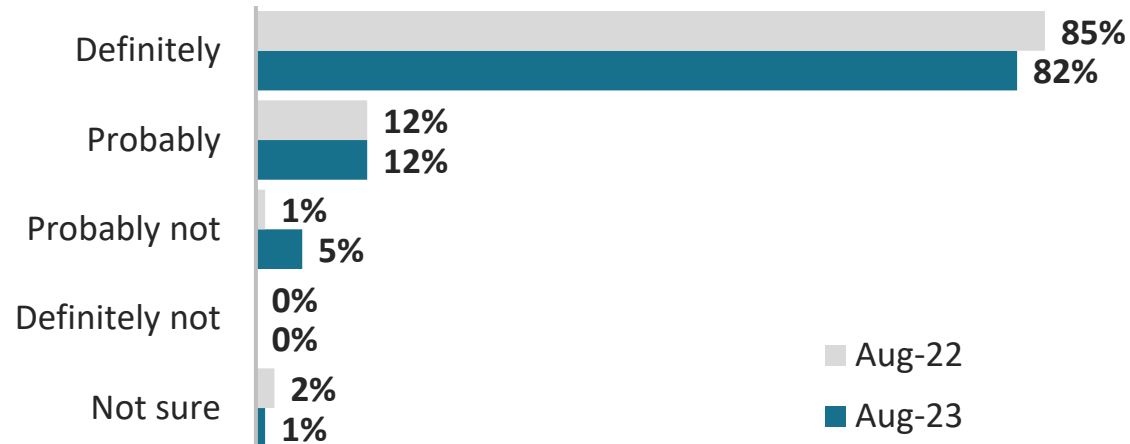
VISITOR JOURNEY: POST-TRIP EVALUATION



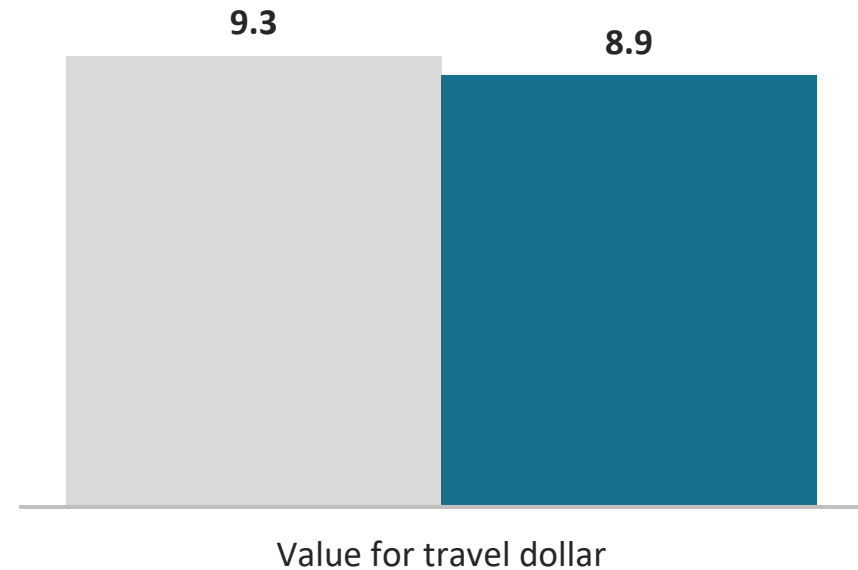
Will recommend the Naples area?



Will return to the Naples area?



VALUE FOR TRAVEL DOLLAR^{1,2}



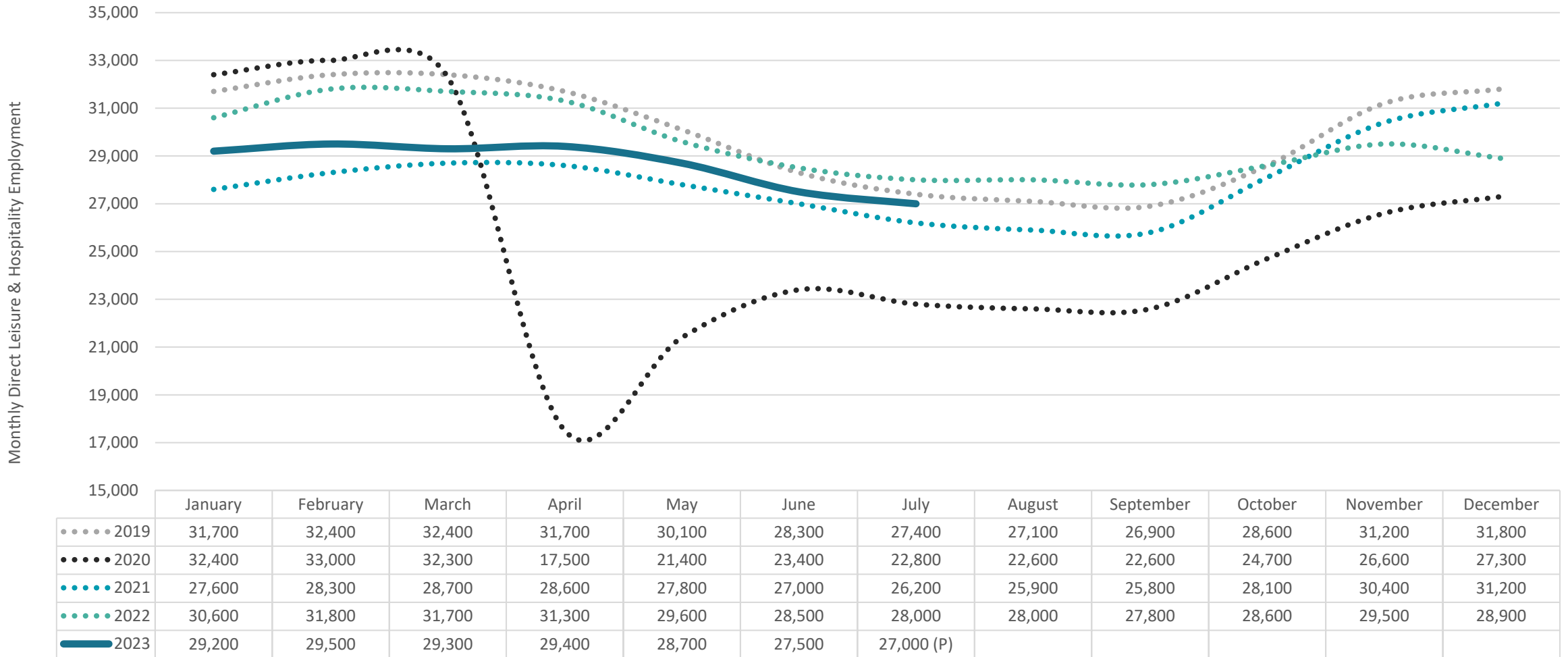
¹ 10-point scale where 10 is "excellent" and 1 is "poor".
² All visitors who gave a rating of 6 or below cited high prices as their primary reason for giving lower ratings.

INDUSTRY DATA



LEISURE & HOSPITALTY EMPLOYMENT

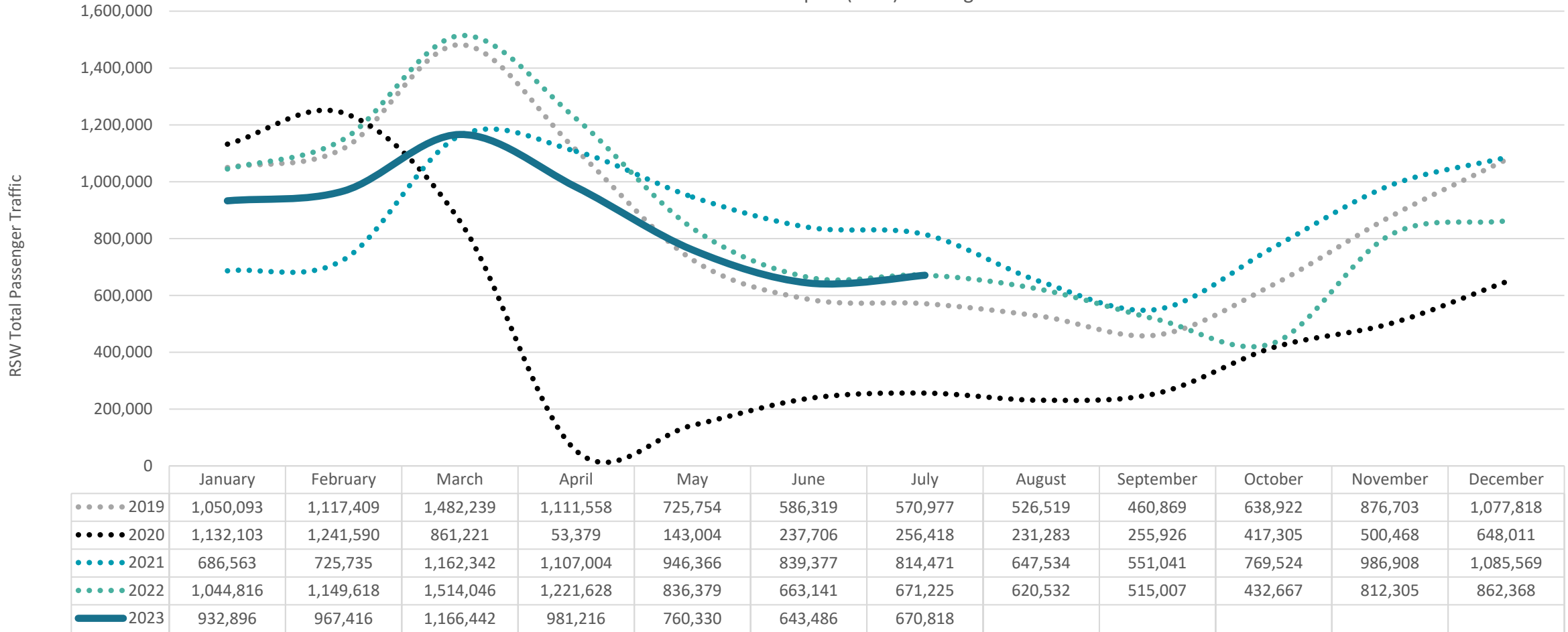
Collier County Direct Leisure and Hospitality Employment (Calendar Year)¹



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



¹SOURCE: Lee County Port Authority Monthly Statistics.

LICENSED TRANSIENT RENTAL UNITS

August 2023 Licensed Transient Rental Units ¹				
	Hotel	Motel	Vacation Rental	Total
Naples	4,452	1,368	2,888	8,708
Marco Island	1,275	121	1,774	3,170
Immokalee	0	70	104	174
Golden Gate	0	150	0	150
Everglades City	38	36	20	94
Chokoloskee	0	13	1	14
Goodland	0	5	5	10
Ave Maria	0	0	2	2
Ochopee	0	0	1	1
Total	5,765	1,763	4,795	12,323²

¹SOURCE: Florida Department of Business & Professional Regulation.

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

NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau
August 2023 Monthly Dashboard

Paul Beirnes, Executive Director
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