NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau
December 2022 Monthly Dashboard

NAPLES · MARCO ISLAND
EVERGLADES
FLORIDA'S PARADISE COAST

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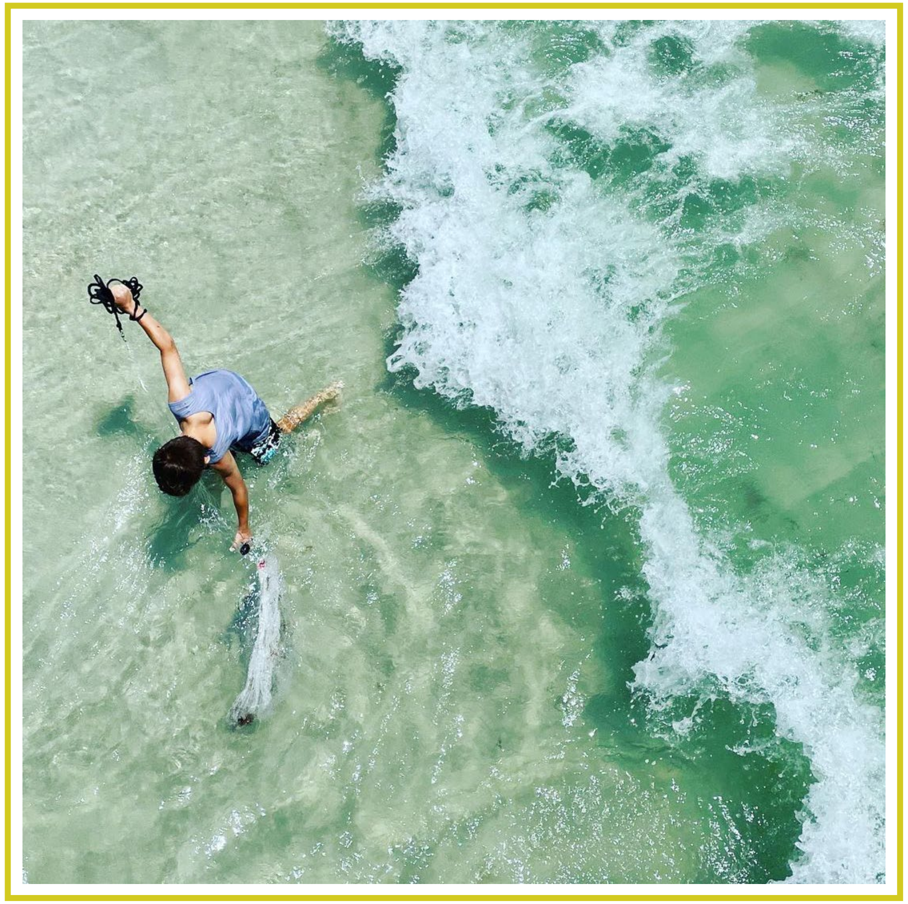
RESEARCH

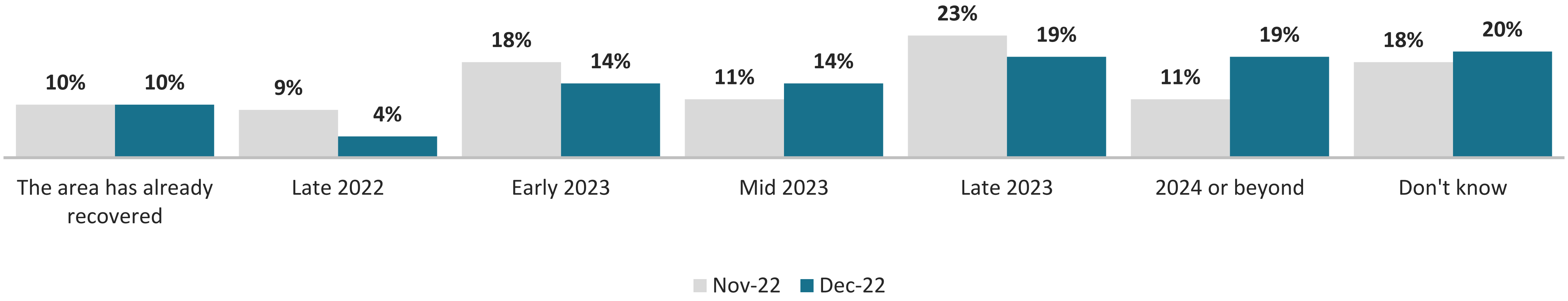
MONTHLY SNAPSHOT

- A large number of flight cancellations due to inclement weather during the holidays caused decreases in Occupancy, ADR, and RevPAR.
- The median number of days that visitors spent planning their trips increased to 65 in December, 15 days longer than 2021.
- Most visitors believe that the area will have recovered enough by the end of 2023 that a trip to the area will feel "back to normal".
- Compared to 2021, more visitors in December were coming from within Florida, from other parts of the Southeast, or from the Midwest.
- Occupancy was down, but visitation and room nights were up slightly. This is due to more units being available in 2022 compared to 2021, mainly driven by DBPR reporting more licensed vacation rentals.



HURRICANE RECOVERY*

HURRICANE RECOVERY



* Visitors staying in paid accommodations.
"When do you think Florida's Paradise Coast will recover enough to make a trip to the area feel back to normal?"

DECEMBER 2022 LODGING METRICS*

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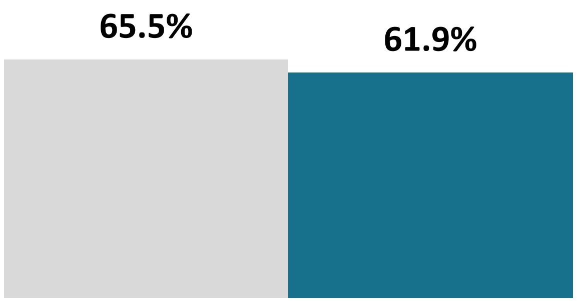
EVERGLADES
FLORIDA'S PARADISE COAST

OCCUPANCY RATE

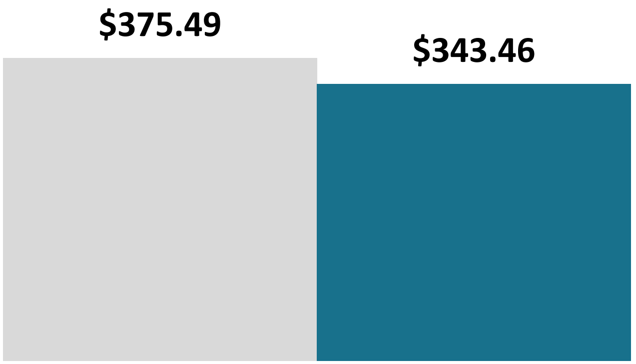
61.9%



- 5.5% from 2021

AVERAGE DAILY RATE

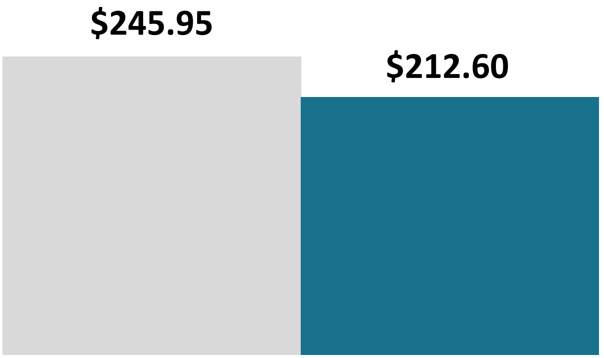
$343.46



- 8.5% from 2021

REVENUE PER AVAILABLE ROOM

$212.60



- 13.6% from 2021

Dec-21 Dec-22

* Visitors staying in paid accommodations.

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DECEMBER 2019-2022 LODGING METRICS*

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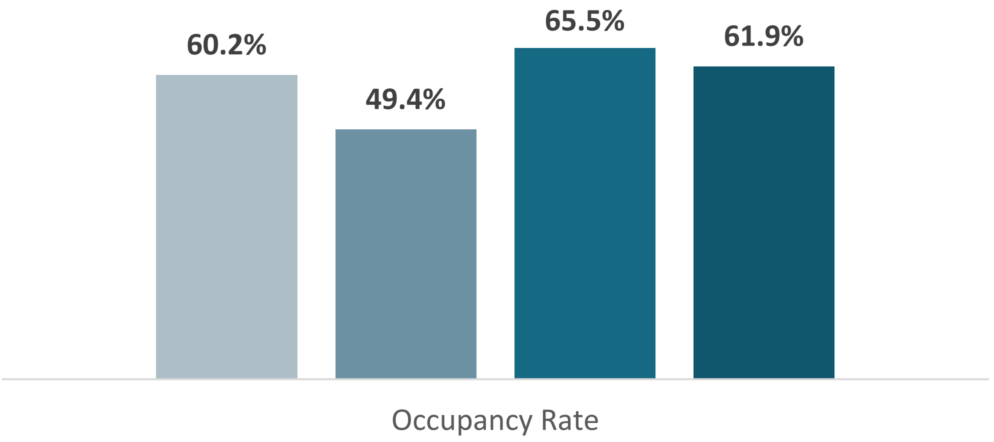

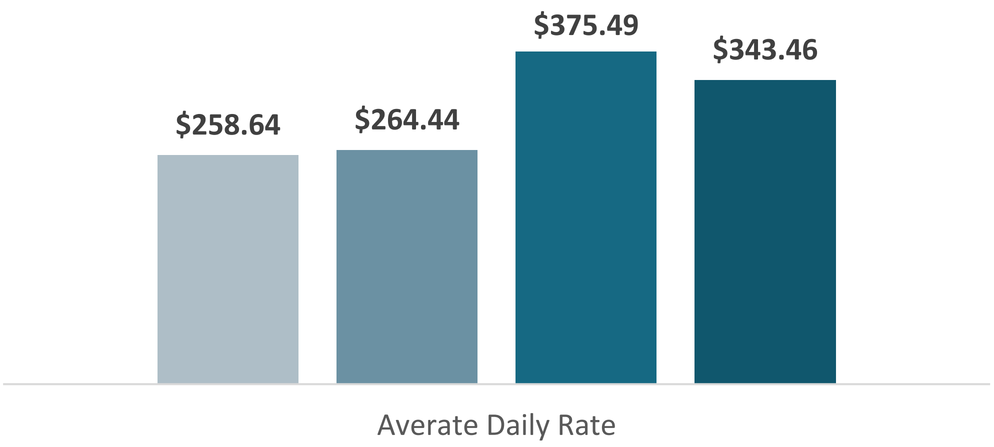

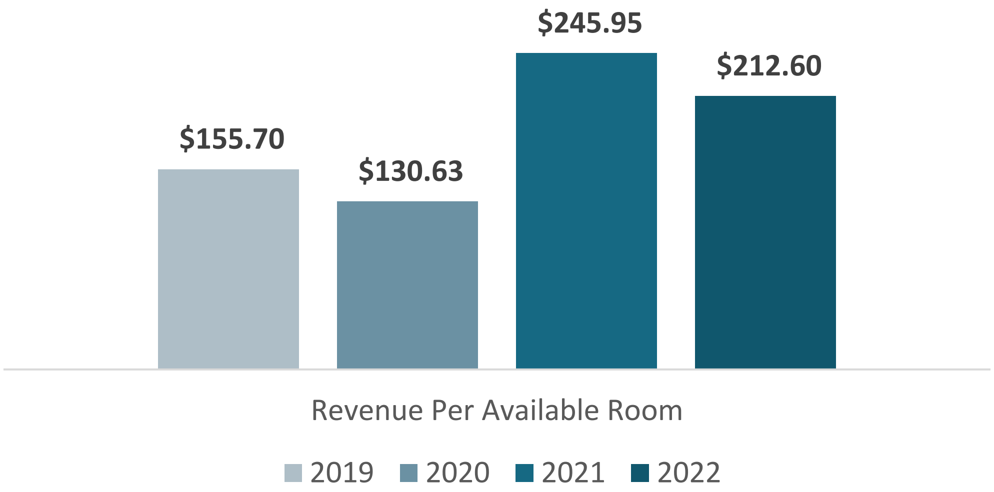

* Visitors staying in paid accommodations.

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DECEMBER 2022 VISITATION & ROOM NIGHTS*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

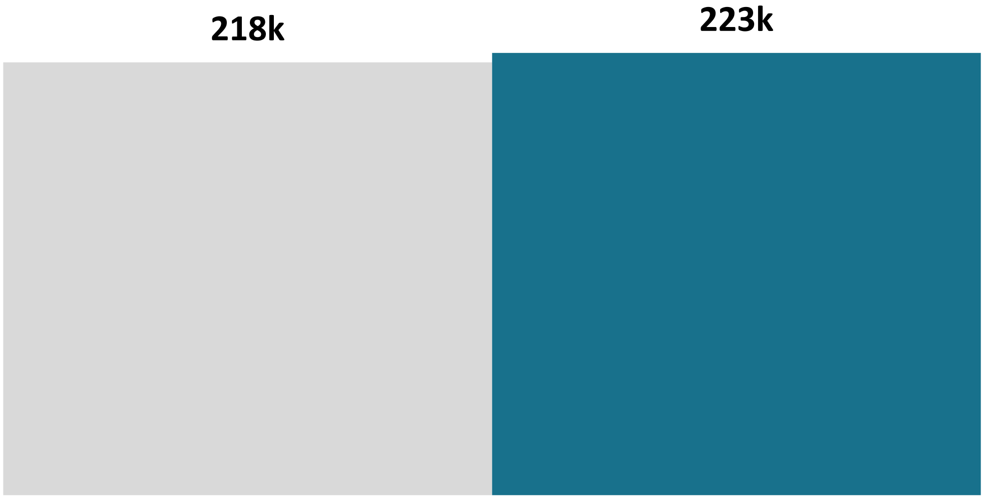
VISITORS

123,700

+ 3.0% from 2021

ROOM NIGHTS

222,600



+ 2.2% from 2021

Dec-21 Dec-22

* Visitors staying in paid accommodations.

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DECEMBER 2022 SPENDING & ECONOMIC IMPACT*

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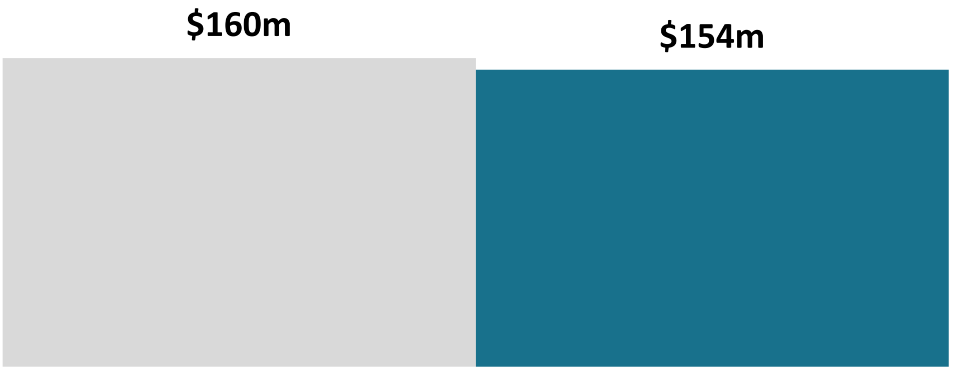
FLORIDA'S PARADISE COAST

DIRECT SPENDING

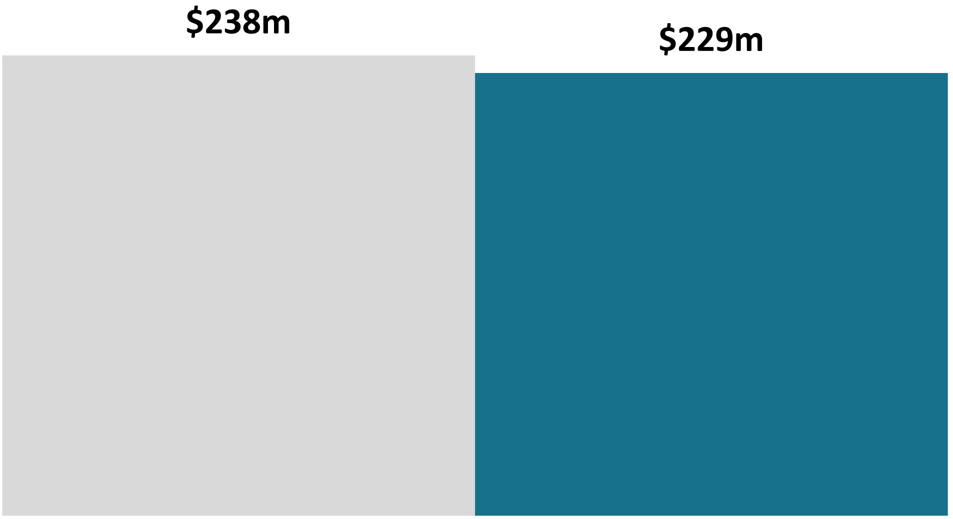
$153,590,900



- 3.8% from 2021

ECONOMIC IMPACT

$229,004,000



- 3.8% from 2021

Dec-21 Dec-22

* Visitors staying in paid accommodations.

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VISITOR ORIGIN*

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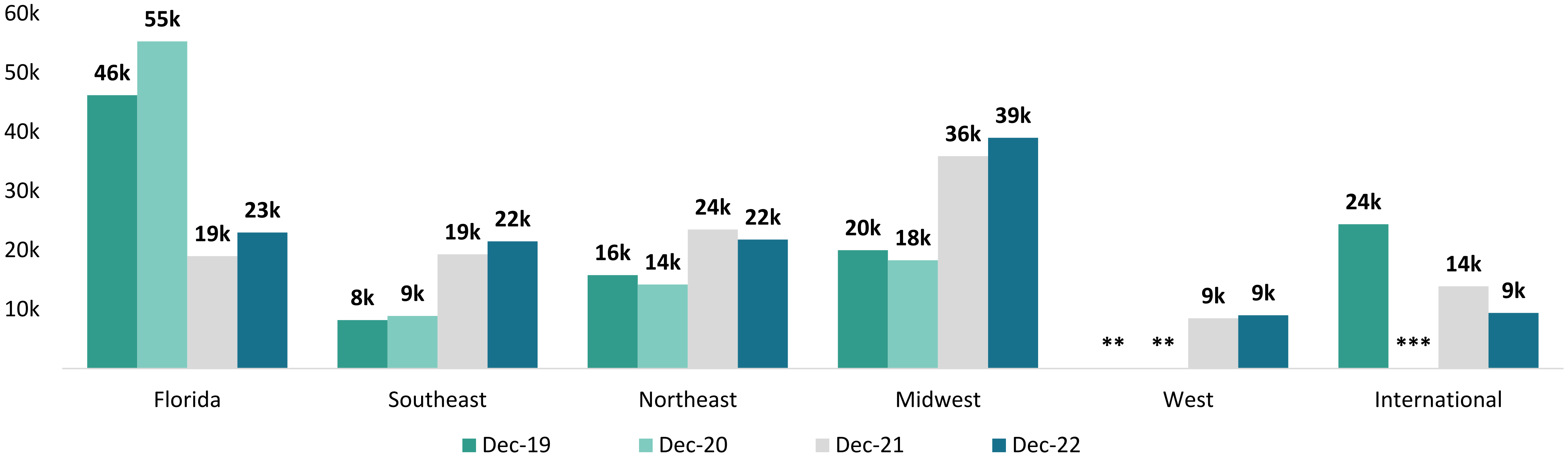
FLORIDA'S PARADISE COAST

FLORIDA VISITORS

23,000

OUT-OF-STATE VISITORS

100,700



* Visitors staying in paid accommodations.
** Visitation from western U.S. states not separated from “other” category in December 2019 and 2020.
*** International visitation was too low to estimate in December 2020.

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CUMULATIVE VISITATION & ROOM NIGHTS*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

CYTD VISITORS

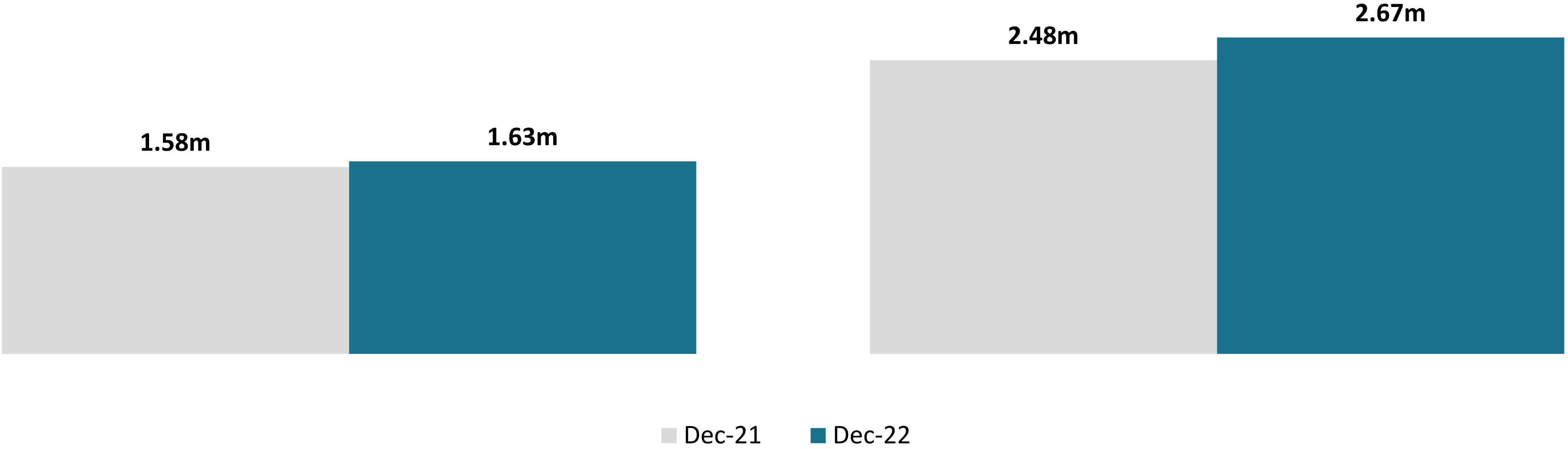
1,627,100

+ 3.0% from 2021

CYTD ROOM NIGHTS

2,674,400

+ 7.7% from 2021



* Visitors staying in paid accommodations.

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CUMULATIVE SPENDING & ECONOMIC IMPACT*

CYTD DIRECT SPENDING

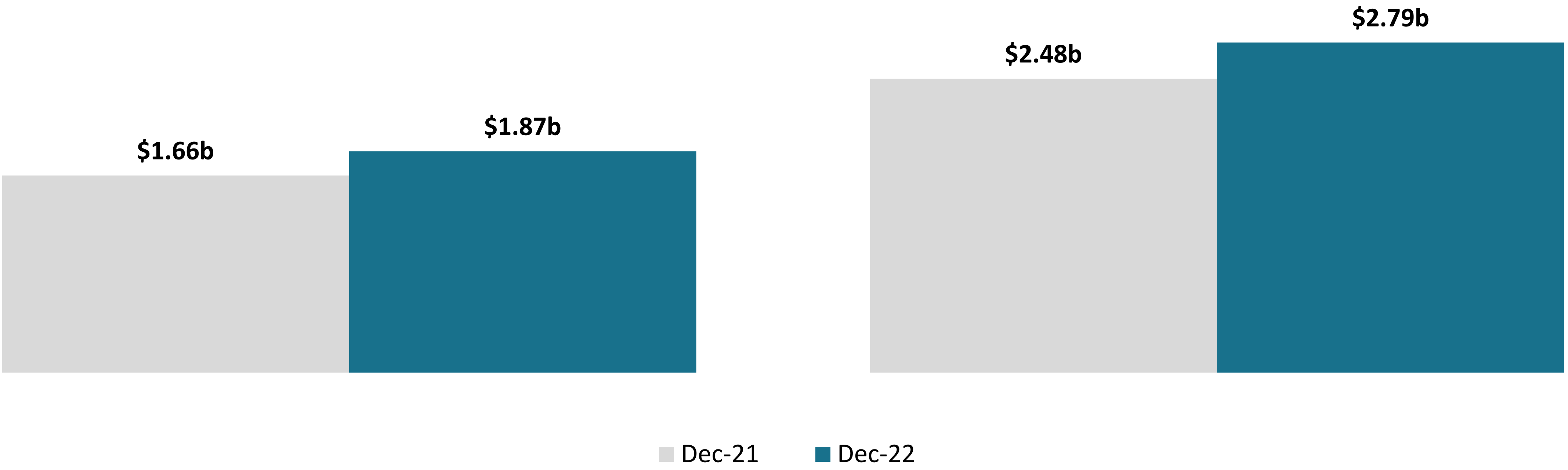
$1,869,081,500

+ 12.3% from 2021

CYTD ECONOMIC IMPACT

$2,786,800,600

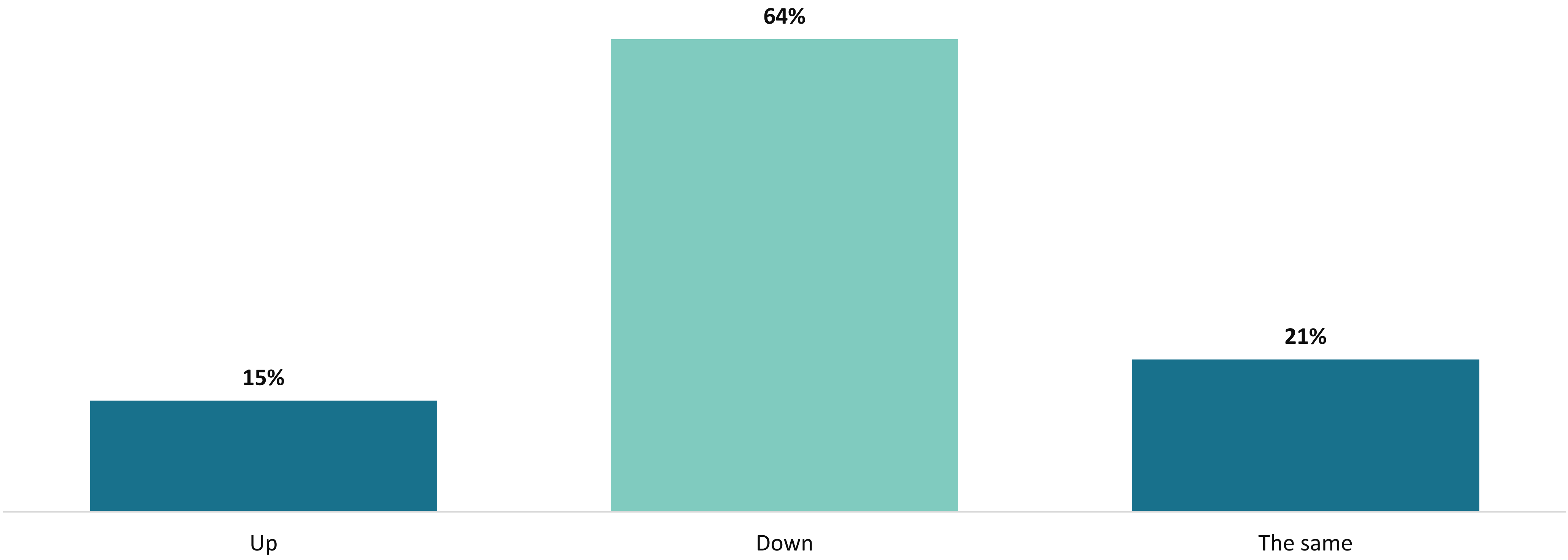
+ 12.3% from 2021



* 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?

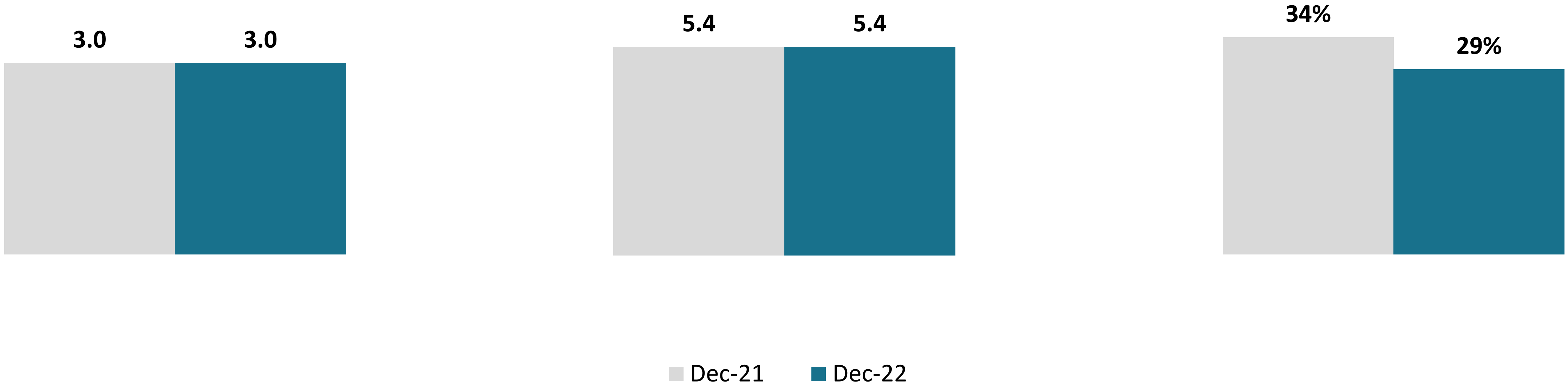


TRIP CHARACTERISTICS*

TRAVEL PARTY SIZE
3.0

NIGHTS STAYED
5.4

1ST TIME VISITORS
29%



* Visitors staying in paid accommodations.

TRIP PLANNING CYCLE*

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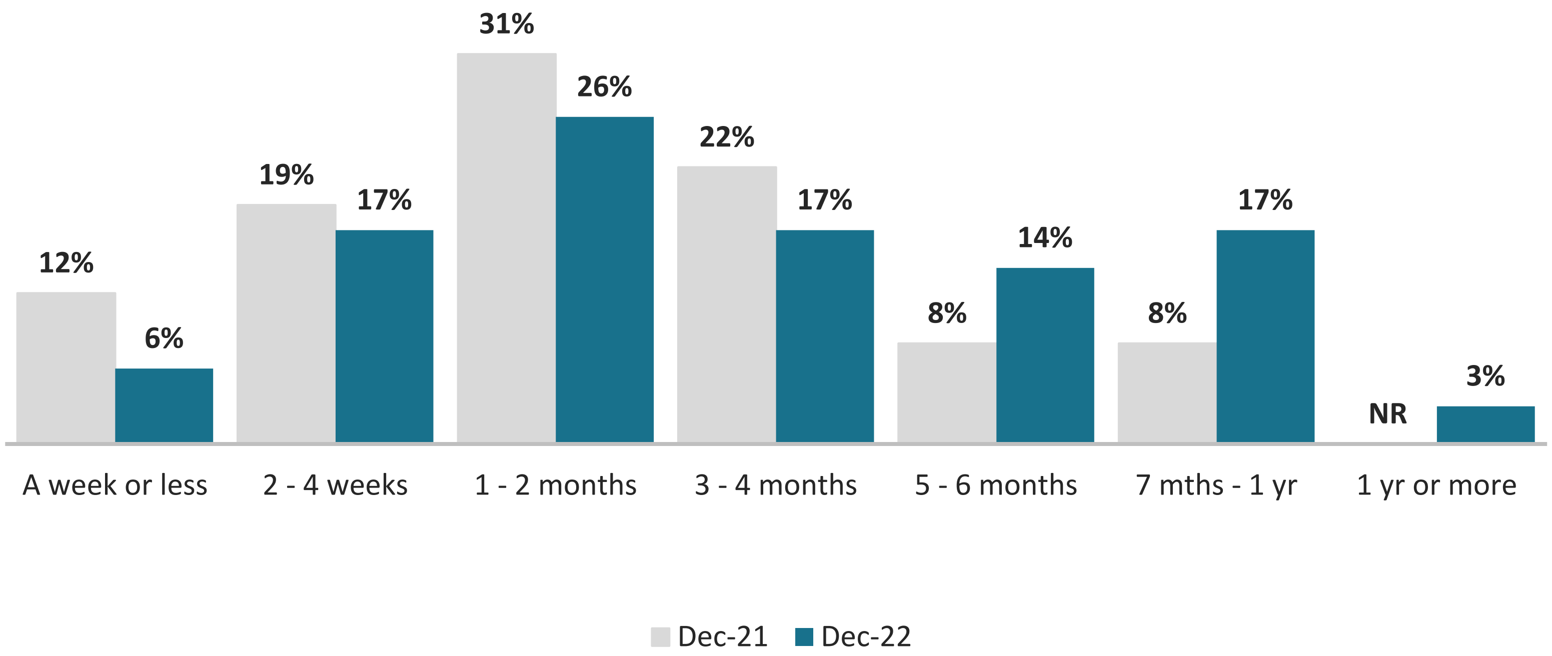
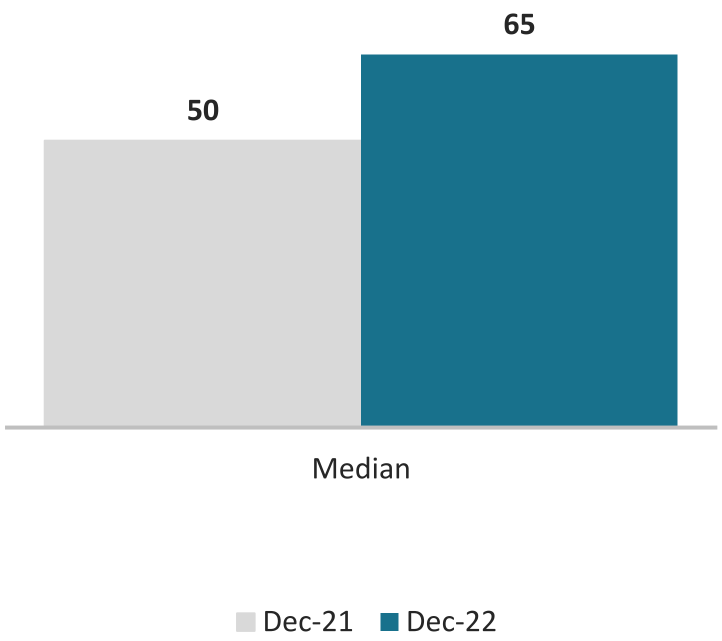
FLORIDA'S PARADISE COAST

PLANNING WINDOWS



MEDIAN PLANNING DAYS



* Visitors staying in paid accommodations.

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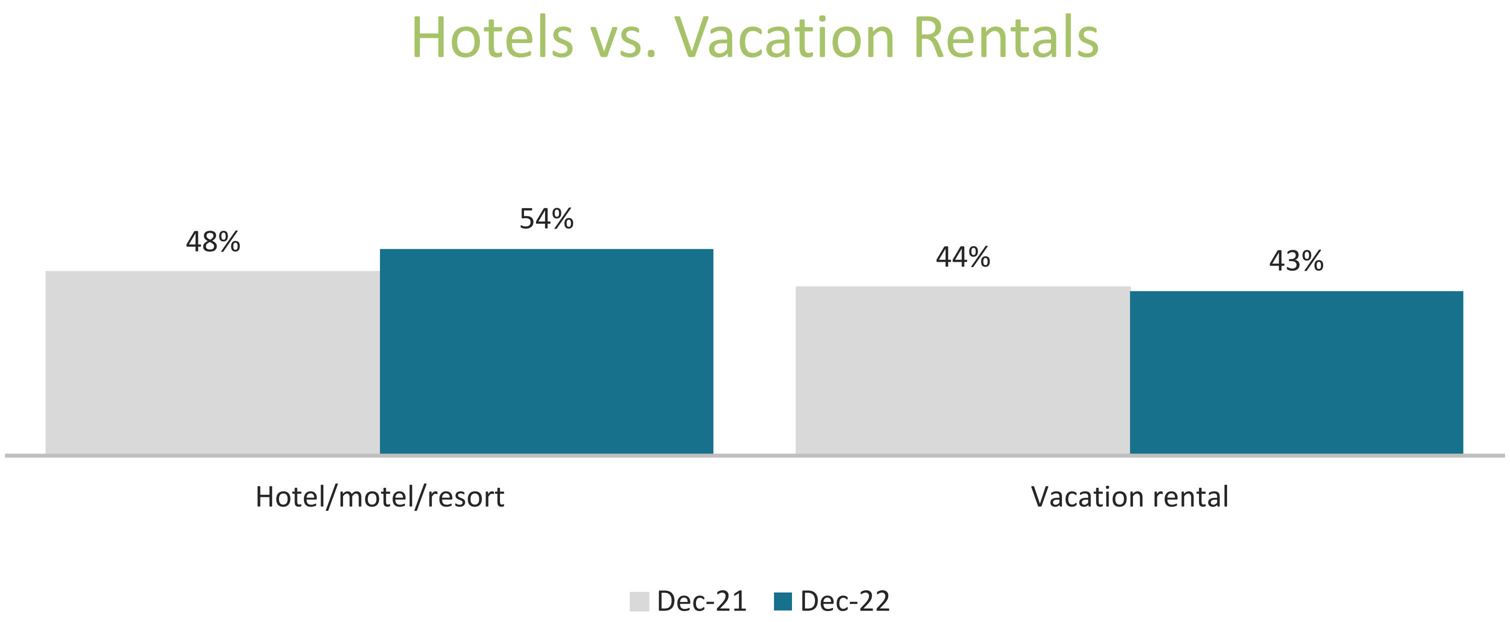
TOP ACCOMODATIONS*



* Visitors staying in paid accommodations.

TRAVEL PARTIES*

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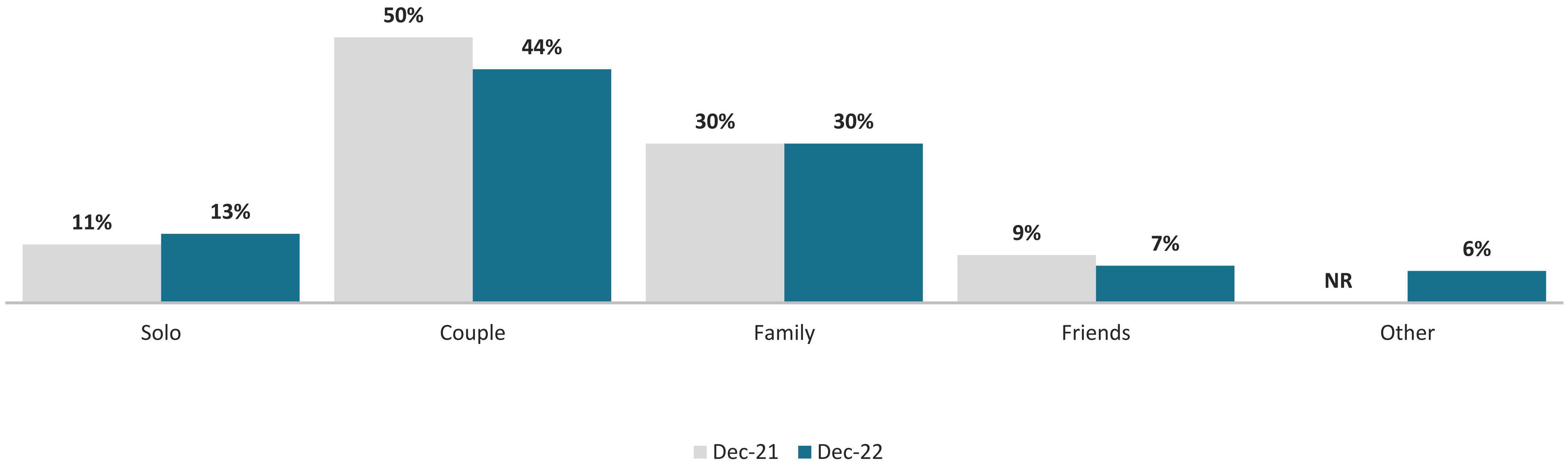
FLORIDA'S PARADISE COAST

TRAVEL PARTY COMPOSITION



* Visitors staying in paid accommodations.

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REASONS FOR CHOOSING AREA[1]

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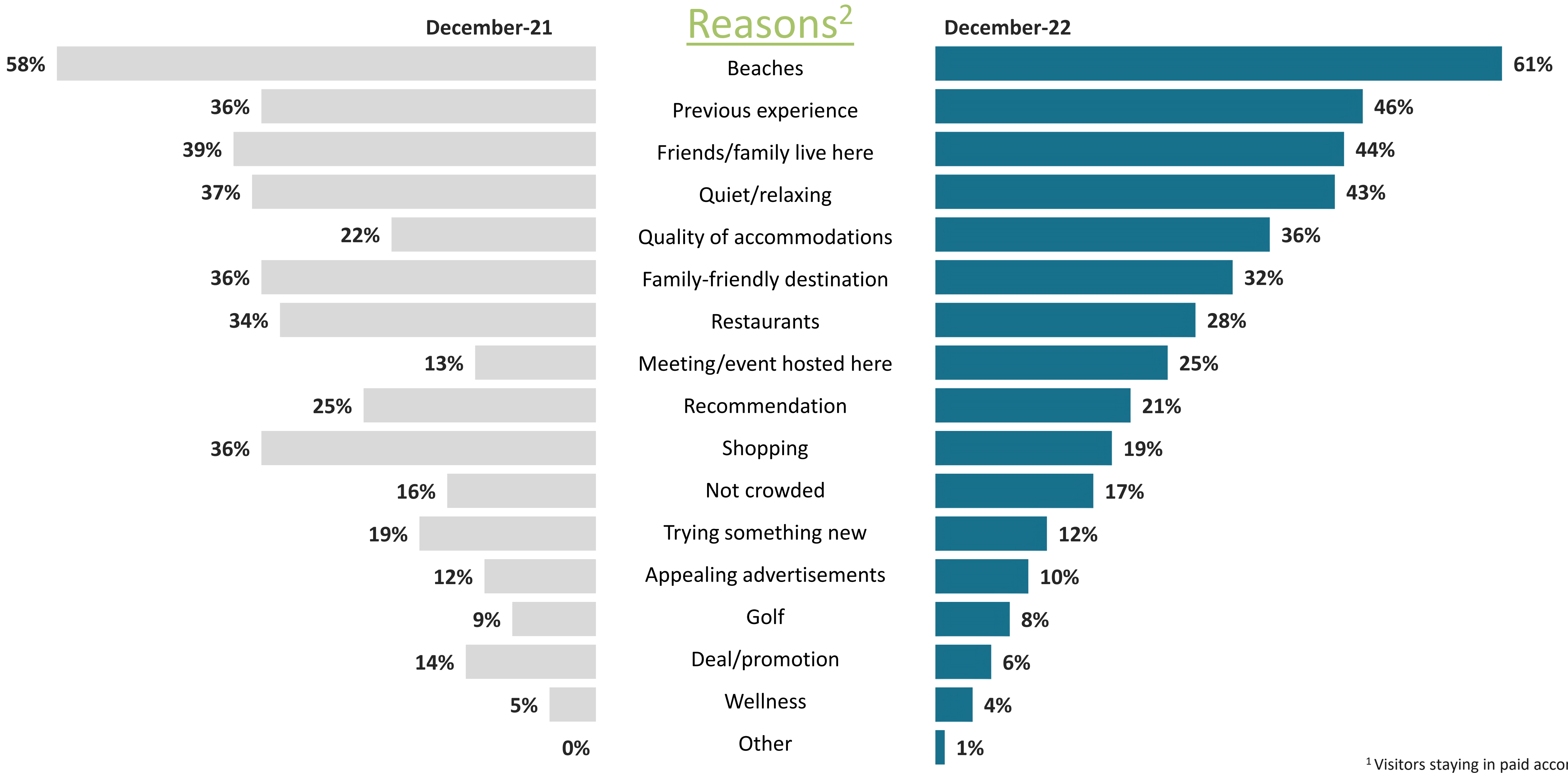
FLORIDA'S PARADISE COAST



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

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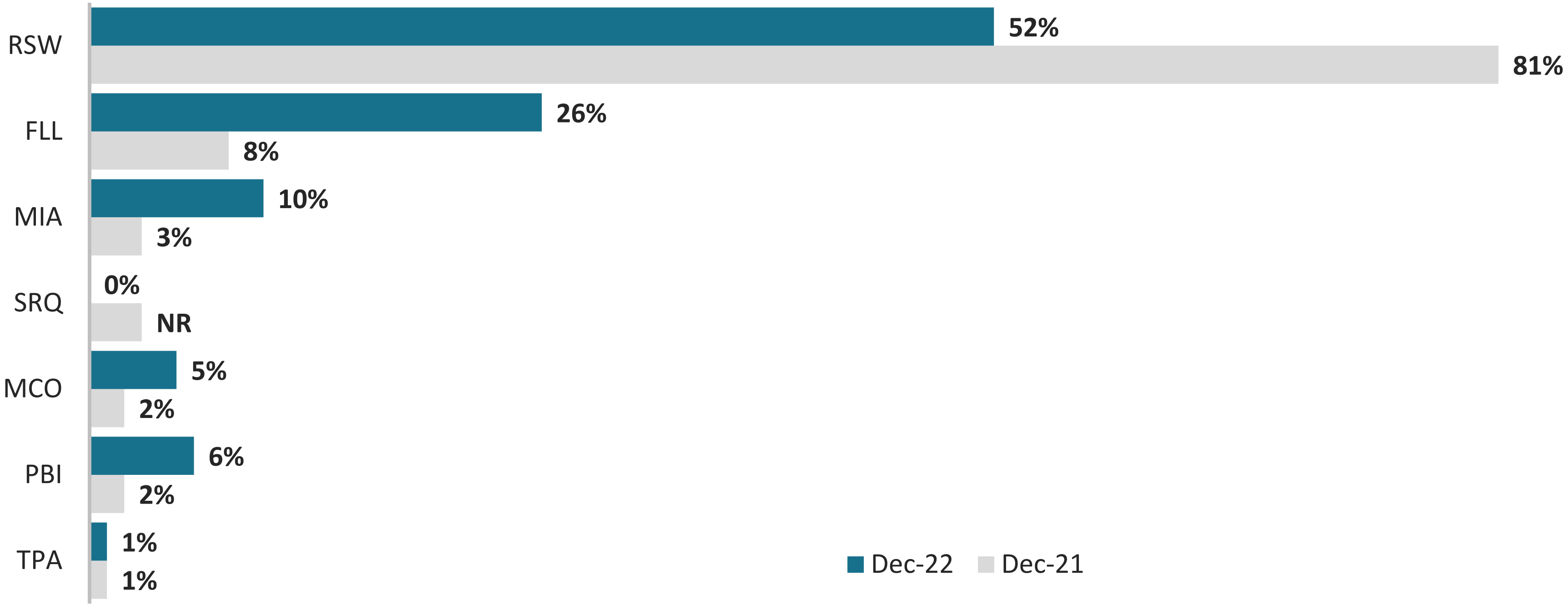
TRANSPORTATION METHODS*



* Visitors staying in paid accommodations.

VISITOR DEMOGRAPHICS*

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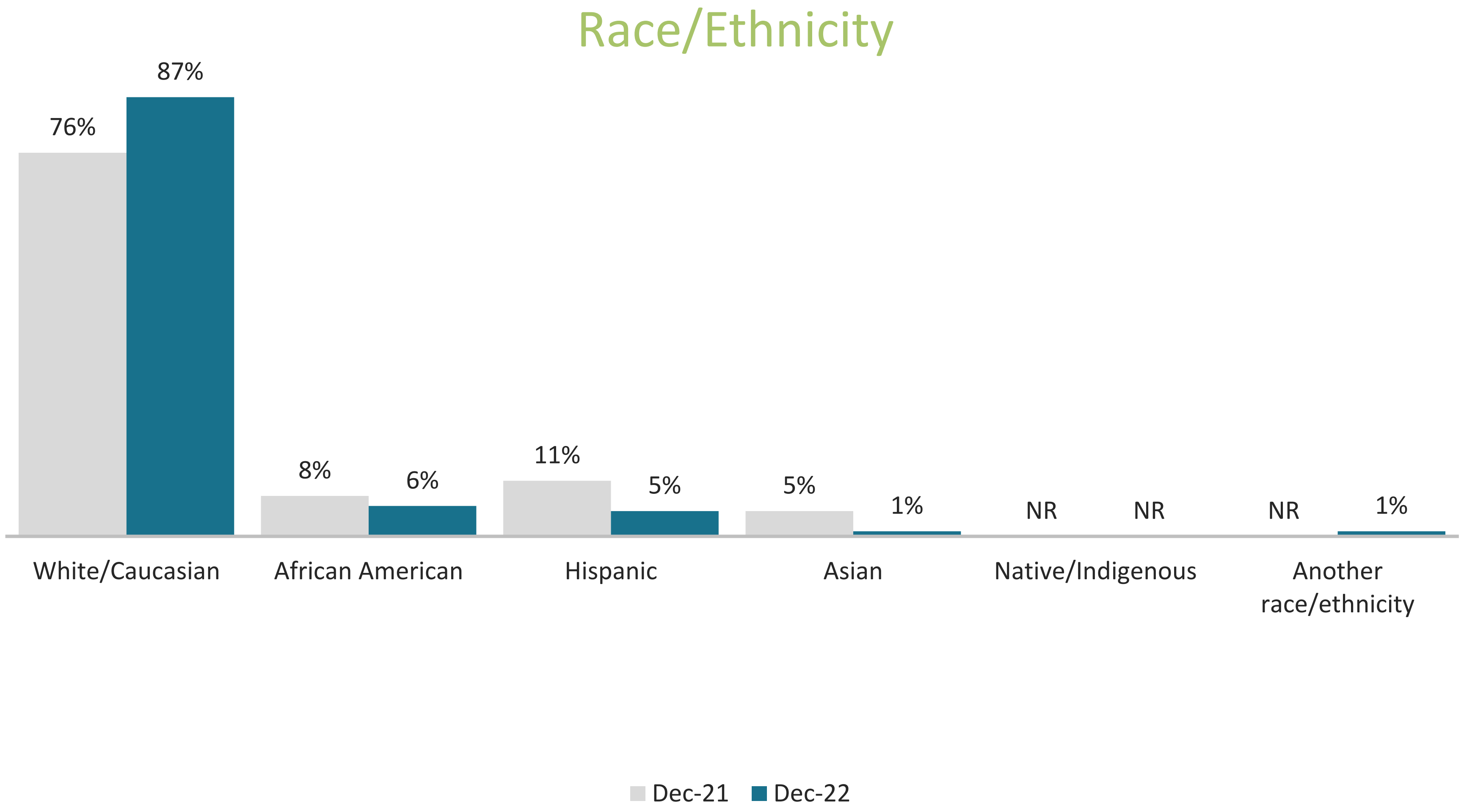
FLORIDA'S PARADISE COAST



* Visitors staying in paid accommodations.

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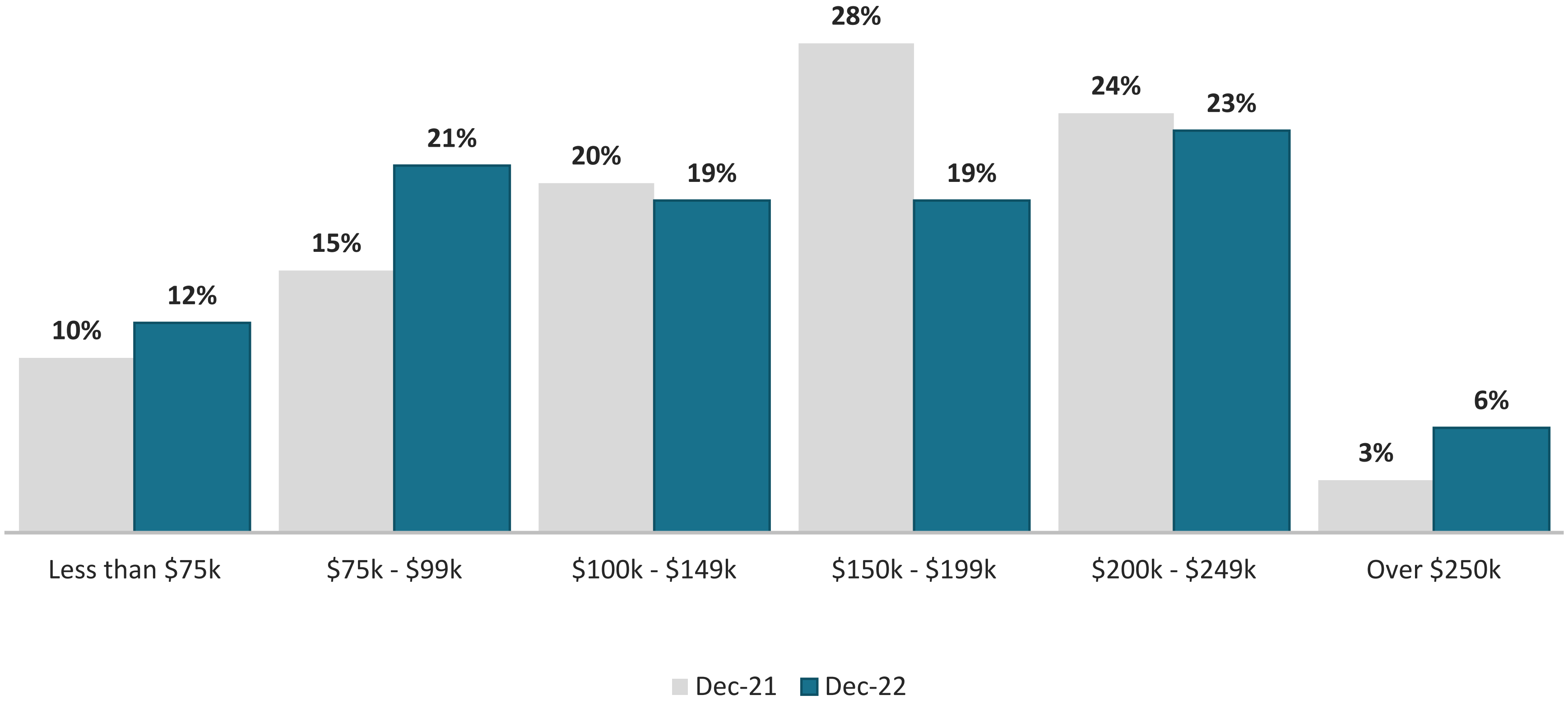
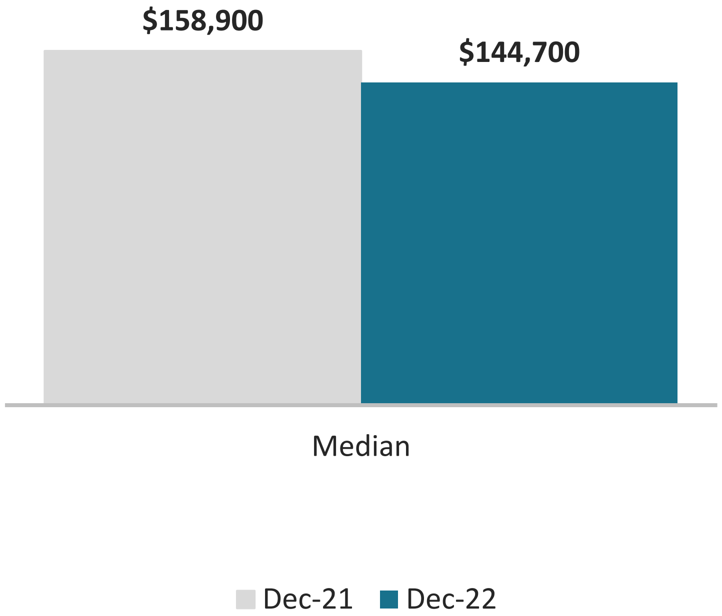
VISITOR DEMOGRAPHICS*

NAPLES · MARCO ISLAND
EVERGLADES
FLORIDA'S PARADISE COAST

Annual Household Income





* Visitors staying in paid accommodations.

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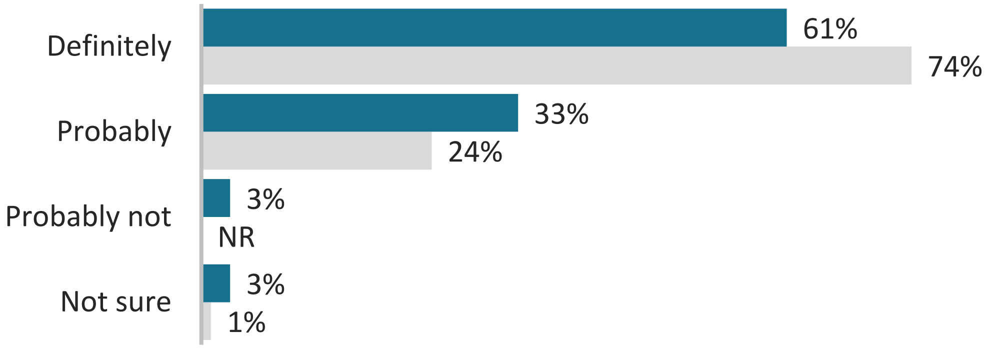
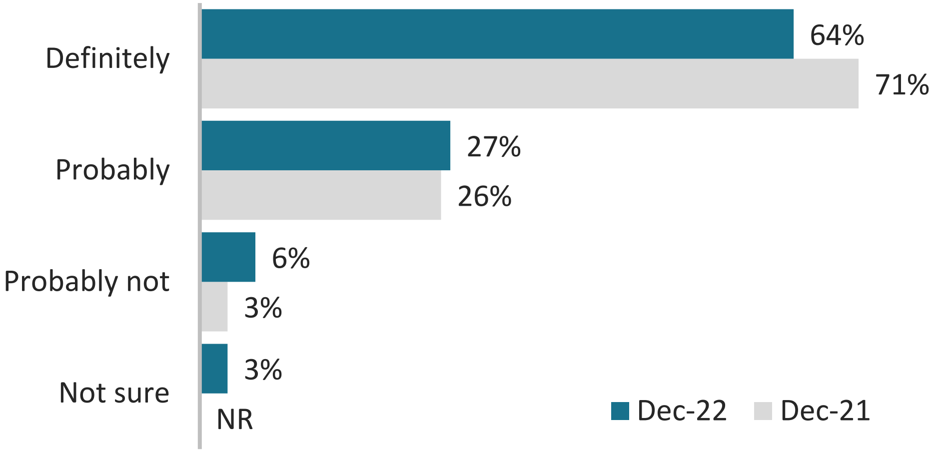
TRIP EVALUATIONS*

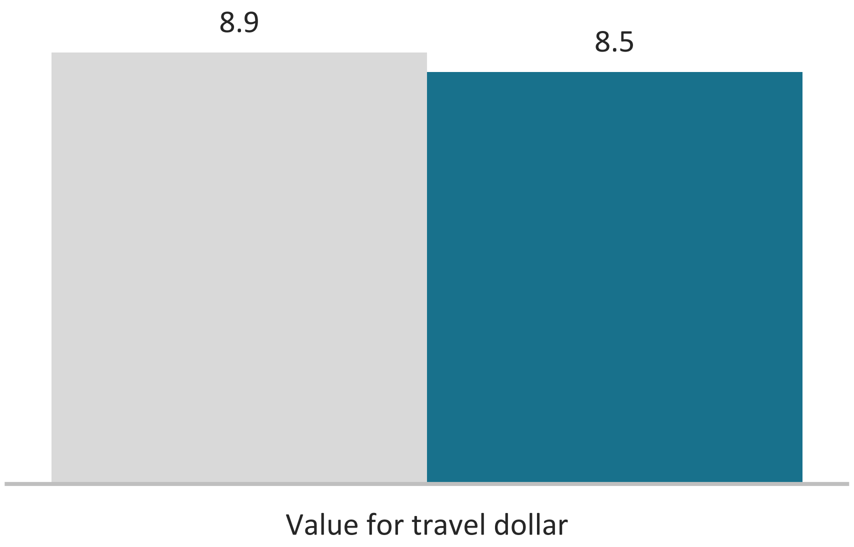
Will recommend the Naples area?



Will return to the Naples 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.

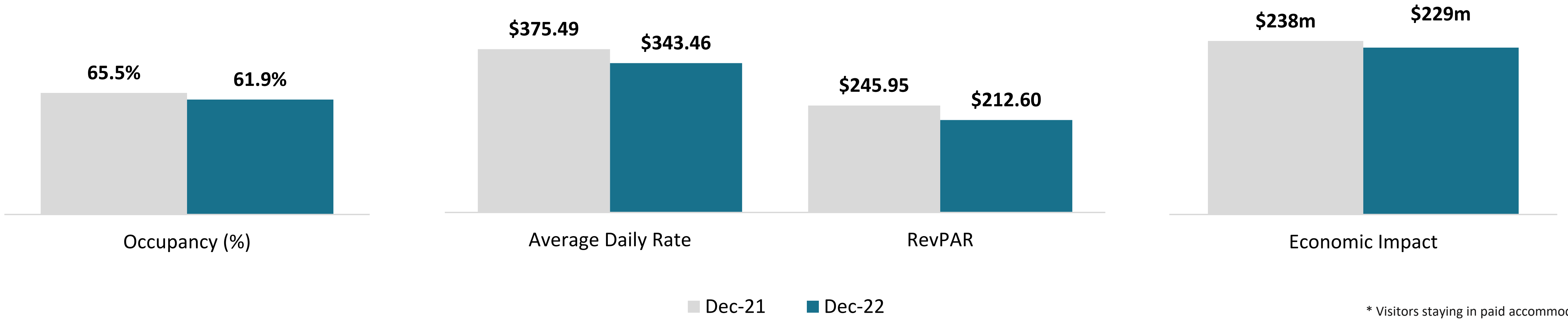
DECEMBER 2022 METRICS

DECEMBER 2022 OVERNIGHT VISITATION & LODGING*

NAPLES · MARCO ISLAND
EVERGLADES
FLORIDA'S PARADISE COAST

	December 2021	December 2022	% Change from 2021
Occupancy Rate	65.5%	61.9%	- 5.5%
Average Daily Rate	$375.49	$343.46	- 8.5%
RevPAR	$245.95	$212.60	- 13.6%

	December 2021	December 2022	% Change from 2021
Visitors	120,100	123,700	+ 3.0%
Room Nights	217,900	222,600	+ 2.2%
Direct Spending	$159,686,700	$153,590,900	- 3.8%
Economic Impact	$238,092,900	$229,004,000	- 3.8%



* Visitors staying in paid accommodations.

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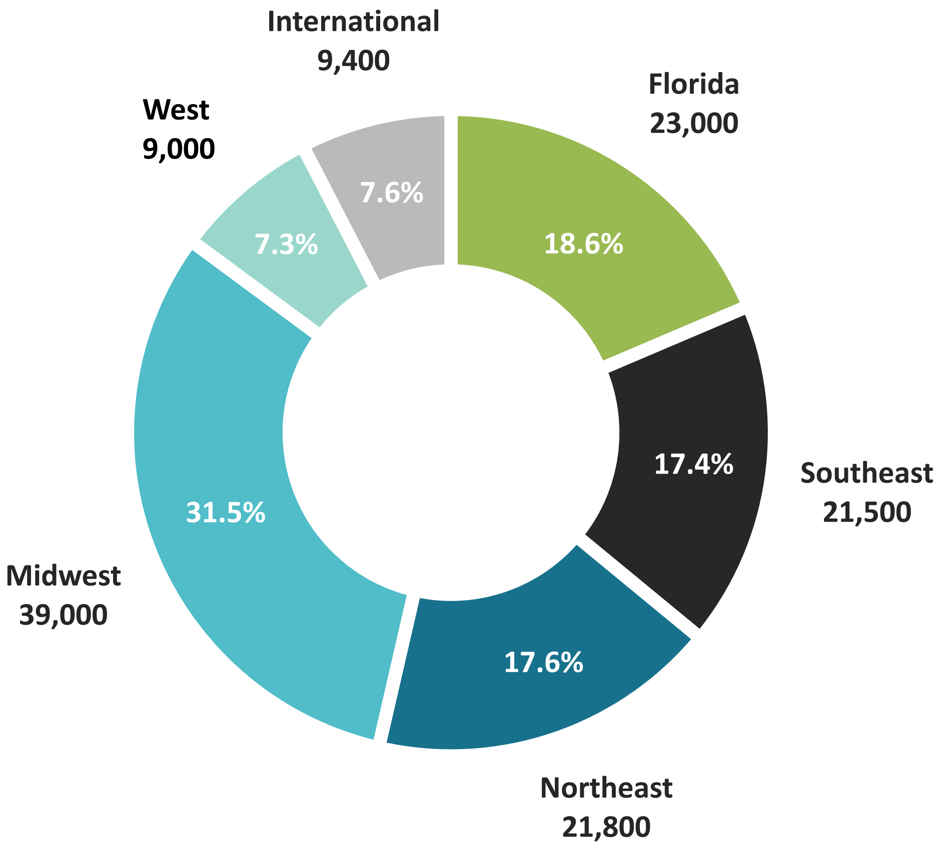
DECEMBER 2022 OVERNIGHT VISITOR ORIGIN MARKETS*

Region	December 2021 # Visitors	December 2021 Mkt Share	December 2022 # Visitors	December 2022 Mkt Share	Percent Change (Δ%) # Visitors	Percent Change (Δ%) Mkt Share
Florida	19,000	15.8%	23,000	18.6%	+ 21.1%	+ 17.7%
Southeast	19,300	16.1%	21,500	17.4%	+ 11.4%	+ 8.1%
Northeast	23,500	19.6%	21,800	17.6%	- 7.2%	- 10.2%
Midwest	35,900	29.9%	39,000	31.5%	+ 8.6%	+ 5.4%
West	8,500	7.1%	9,000	7.3%	+ 5.9%	+ 2.8%
Canada	9,100	7.5%	4,700	3.8%	- 48.4%	- 49.3%
Europe	1,400	1.2%	2,700	2.2%	+ 92.9%	+ 83.3%
C/S America	1,400	1.2%	700	0.6%	- 50.0%	- 50.0%
Other	2,000	1.6%	1,300	1.0%	- 35.0%	- 37.5%
Total	120,100	100.0%	123,700	100.0%		



* Visitors staying in paid accommodations.

CALENDAR YEAR-TO-DATE METRICS

CYTD OVERNIGHT VISITATION & LODGING*

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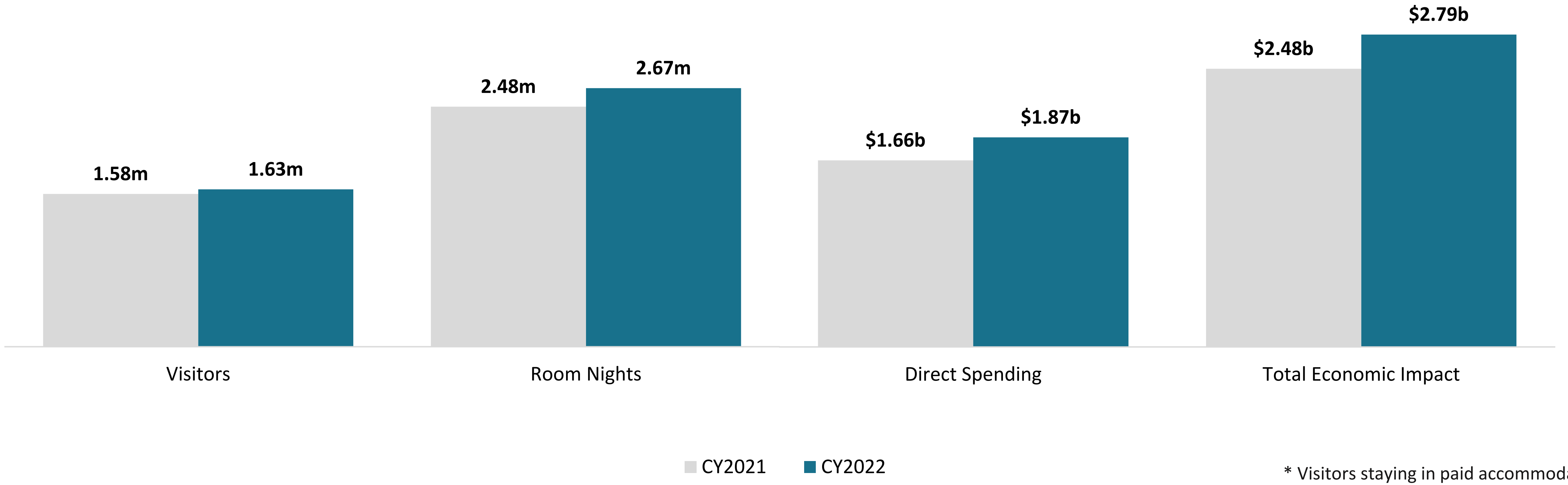
FLORIDA'S PARADISE COAST

	CYTD 2021	CYTD 2022	% Change from 2021
Visitors	1,580,100	1,627,100	+ 3.0%
Room Nights	2,482,400	2,674,400	+ 7.7%
Direct Spending	$1,664,252,000	$1,869,081,500	+ 12.3%
Economic Impact	$2,481,399,800	$2,786,800,600	+ 12.3%



* Visitors staying in paid accommodations.

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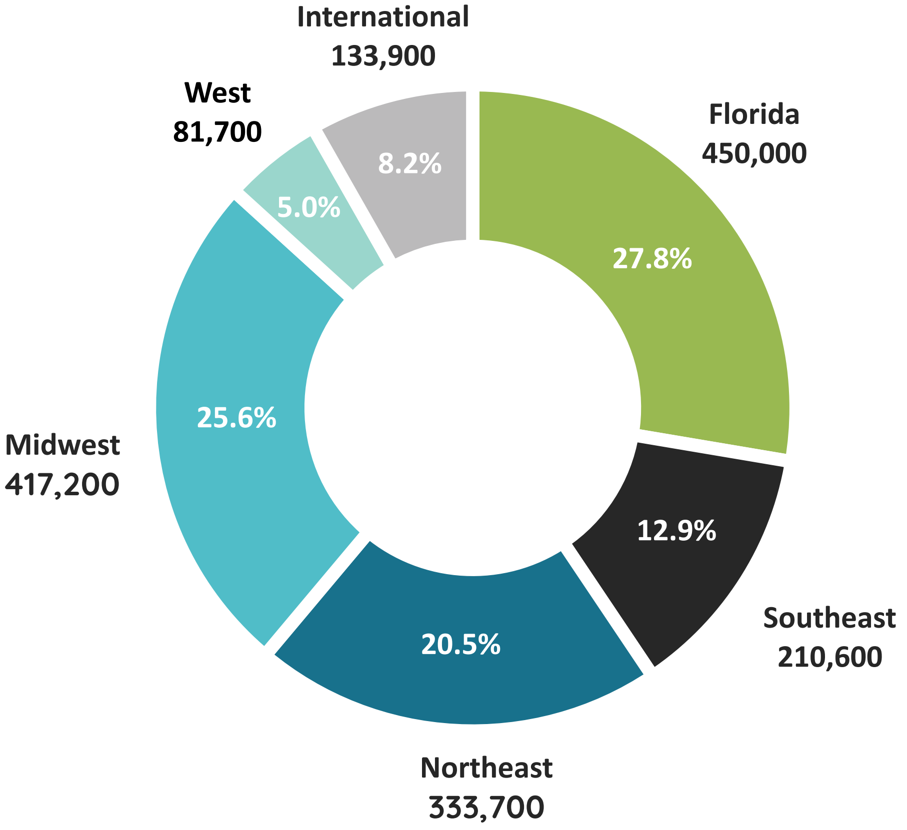
CYTD OVERNIGHT VISITOR ORIGIN MARKETS*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

	CY2021		CY2022		Percent Change (Δ%)	
Region	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	671,000	42.5%	450,000	27.8%	- 32.9%	- 34.6%
Southeast	183,200	11.6%	210,600	12.9%	+ 15.0%	+ 11.2%
Northeast	295,000	18.7%	333,700	20.5%	+ 13.1%	+ 9.6%
Midwest	314,800	19.9%	417,200	25.6%	+ 32.5%	+ 28.6%
West	48,000	3.0%	81,700	5.0%	+ 70.2%	+ 66.7%
Canada	25,900	1.6%	42,800	2.6%	+ 65.3%	+ 62.5%
Europe	21,500	1.4%	56,700	3.5%	+ 163.7%	+ 150.0%
C/S America	14,500	0.9%	15,700	1.0%	+ 8.3%	+ 11.1%
Other	6,200	0.4%	18,700	1.1%	+ 201.6%	+ 175.0%
Total	1,580,100	100.0%	1,627,100	100.0%		



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DECEMBER 2022 VISITOR PROFILE

OF OVERNIGHT VISITORS

HURRICANE RECOVERY*

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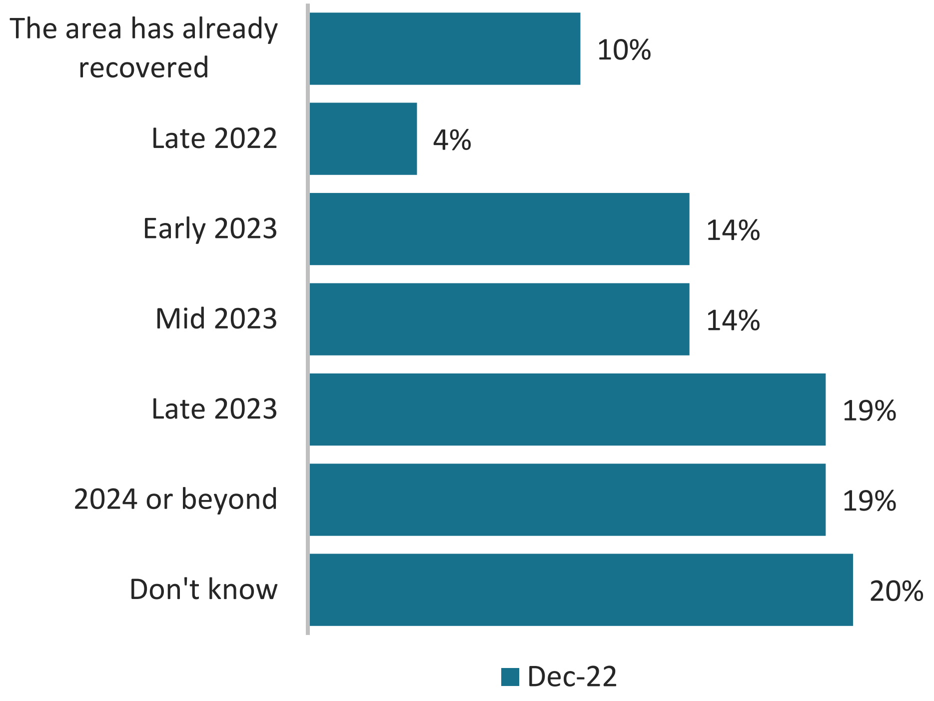
FLORIDA'S PARADISE COAST

Hurricane Recovery		
	Dec-21	Dec-22
The area has already recovered	-	10%
Late 2022	-	4%
Early 2023	-	14%
Mid 2023	-	14%
Late 2023	-	19%
2024 or beyond	-	19%
Don’t know	-	20%



* Visitors staying in paid accommodations.
“When do you think Florida’s Paradise Coast will recover enough to make a trip to the area feel back to normal?”

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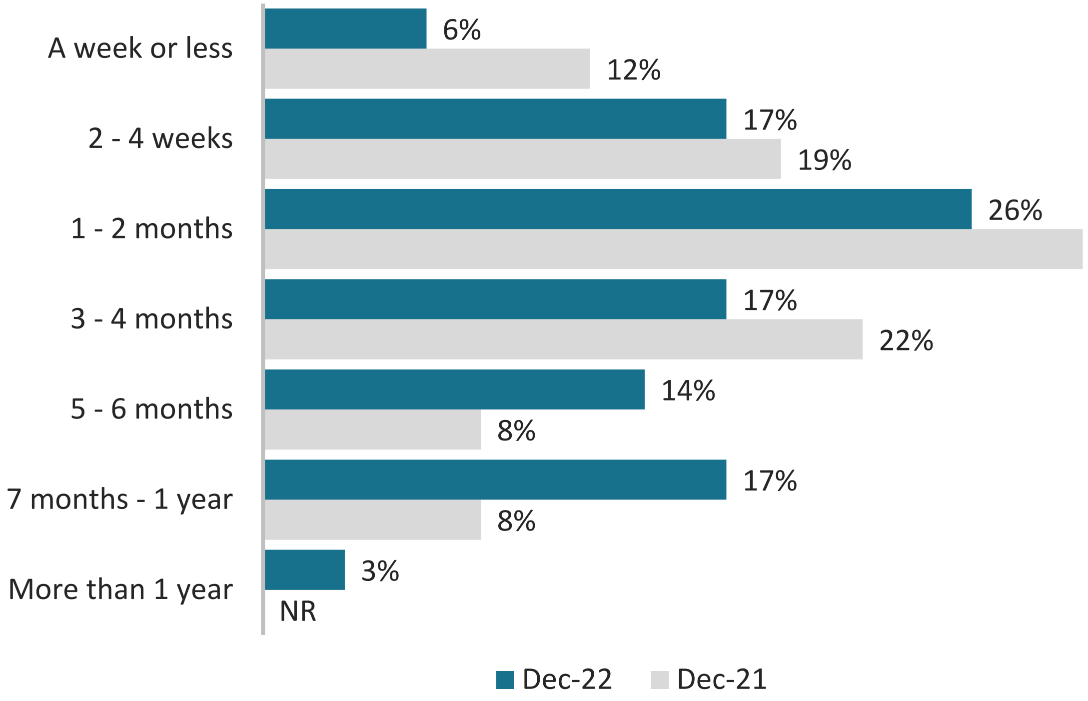
TRIP PLANNING CYCLE*

Trip Planning Cycle		
	Dec-21	Dec-22
A week or less	12%	6%
2 - 4 weeks	19%	17%
1 - 2 months	31%	26%
3 - 4 months	22%	17%
5 - 6 months	8%	14%
7 months – 1 year	8%	17%
More than 1 year	NR	3%
Median (days)	**50**	**65**

[1] Multiple responses permitted.

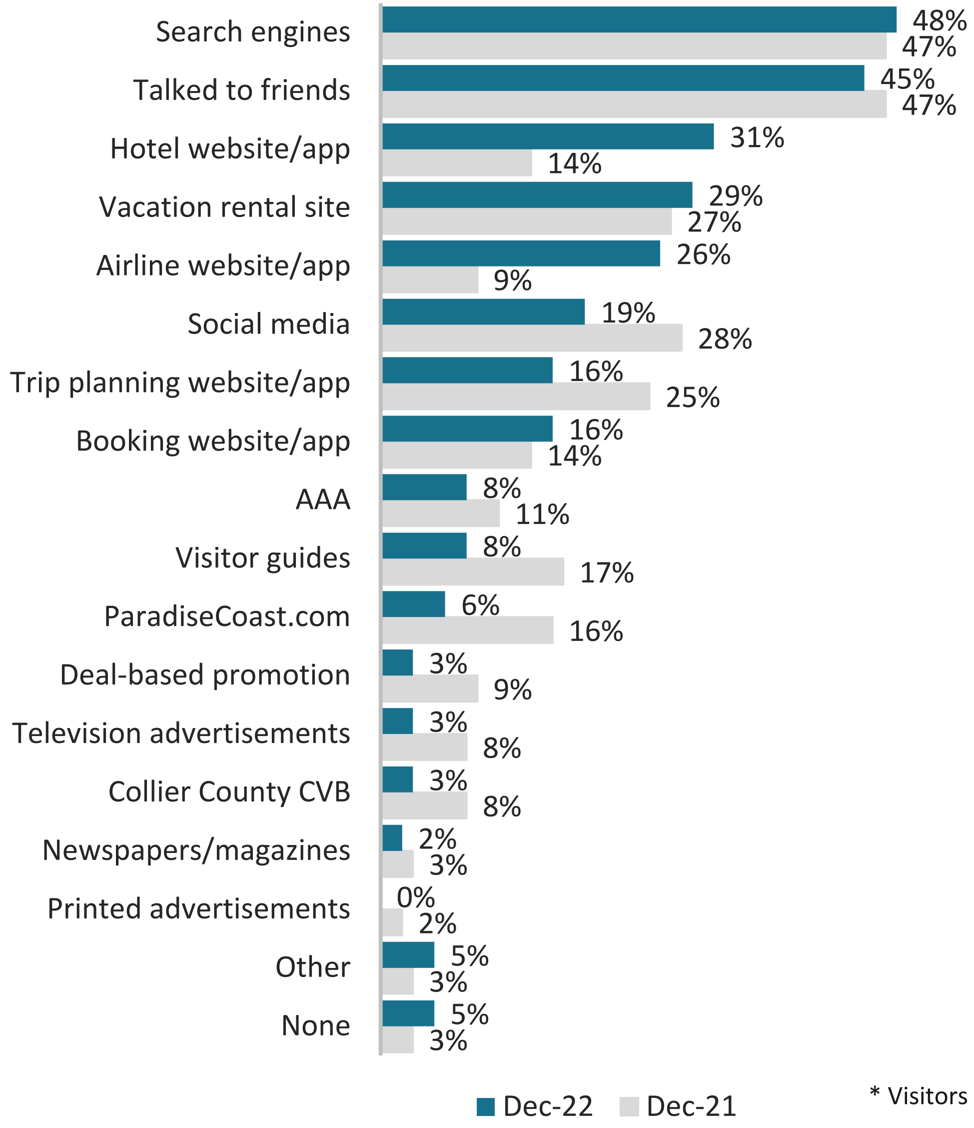


* Visitors staying in paid accommodations.

TRIP PLANNING RESOURCES*

Top Trip Planning Resources[1]		
	Dec-21	Dec-22
Search engines	47%	48%
Talked to friends	47%	45%
Hotel website/app	14%	31%
Vacation rental site	27%	29%
Airline website/app	9%	26%
Social media	28%	19%
Booking website/app	14%	16%
Trip planning website/app	25%	16%
Visitor guides	17%	8%
AAA	11%	8%
ParadiseCoast.com	16%	6%
Collier County CVB	8%	3%
Television advertisements	8%	3%
Deal-based promotion	9%	3%
Newspapers/magazines	3%	2%
Printed advertisements	2%	0%
Other	3%	5%
None	3%	5%

[1] Multiple responses permitted.



* Visitors staying in paid accommodations.

REASONS FOR VISITING*

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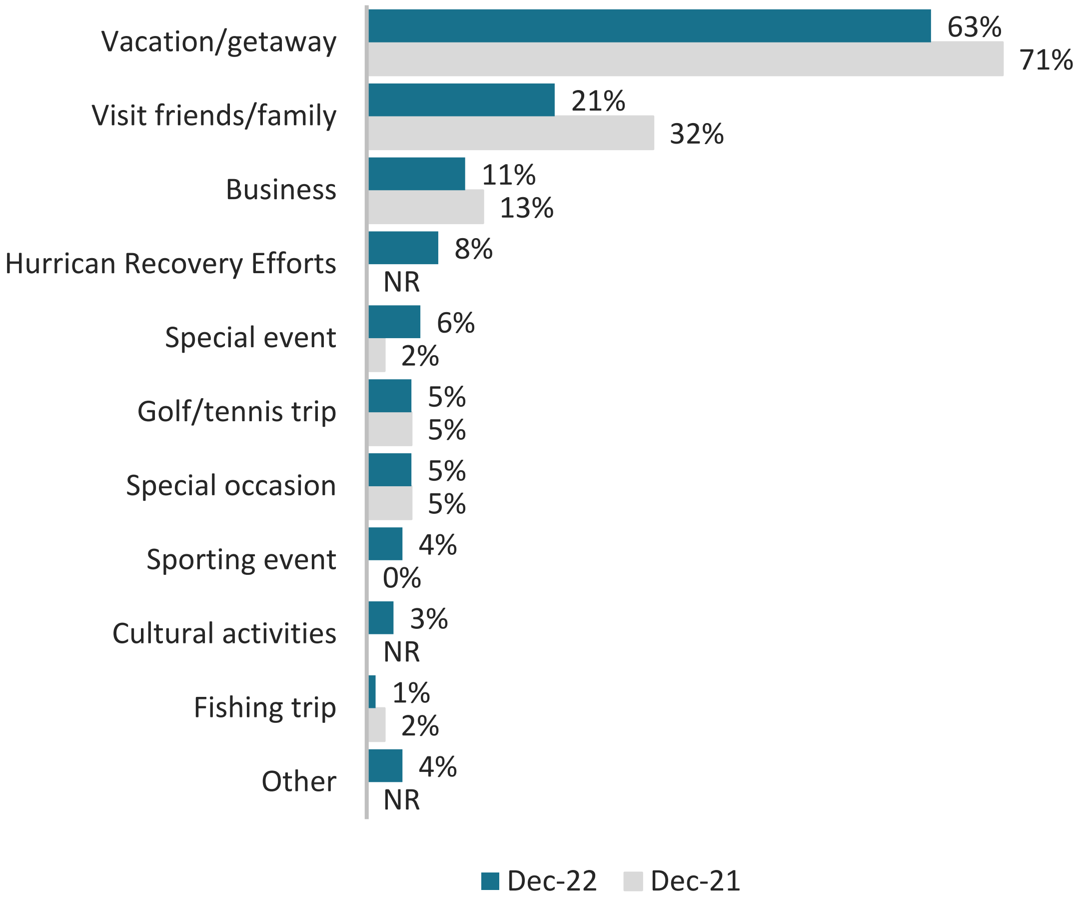
FLORIDA'S PARADISE COAST

Top Reasons for Visiting[1]		
	Dec-21	Dec-22
Vacation/getaway	71%	63%
Visit friends/family	32%	21%
Business	13%	11%
Hurricane Recovery Efforts	-	8%
Special event	2%	6%
Special occasion	5%	5%
Golf/tennis trip	5%	5%
Sporting event	0%	4%
Cultural activities	-	3%
Fishing trip	2%	1%
Other	-	4%

[1] Multiple responses permitted.



* Visitors staying in paid accommodations.

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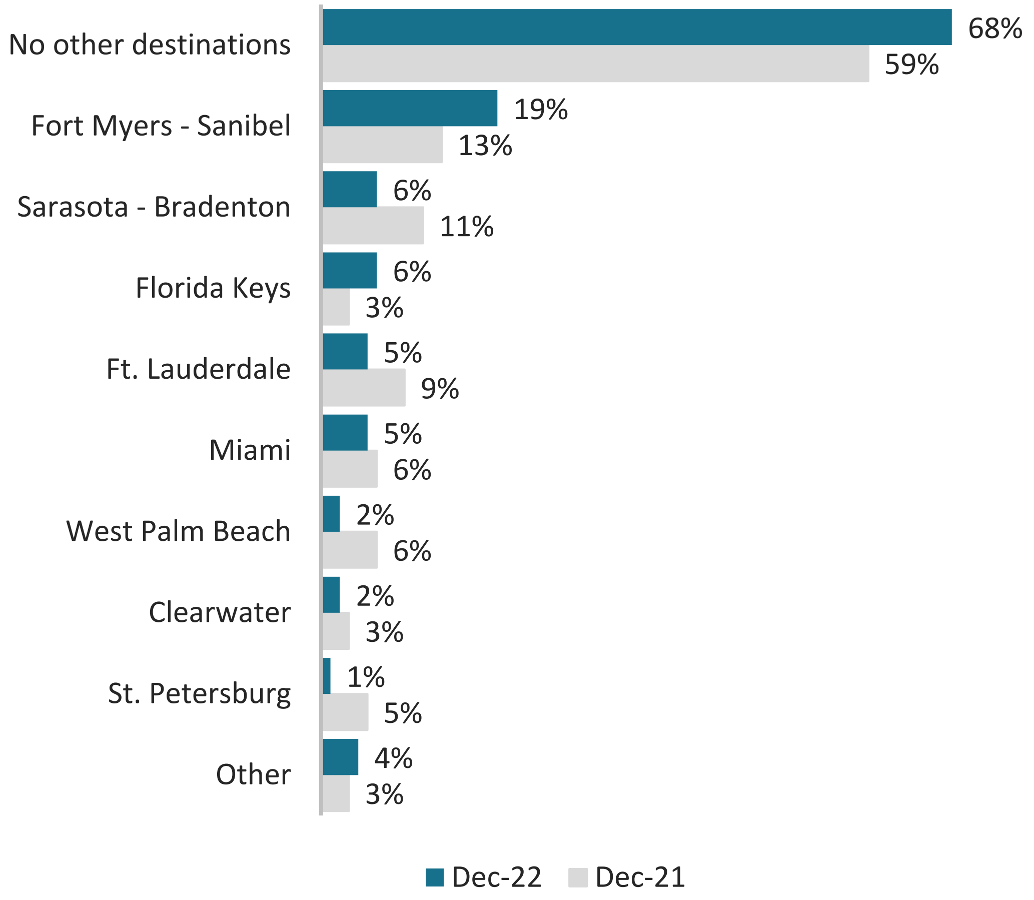
OTHER DESTINATIONS CONSIDERED*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

Other Destinations Considered[1]		
	Dec-21	Dec-22
No other destinations	59%	68%
Fort Myers – Sanibel	13%	19%
Florida Keys	3%	6%
Sarasota – Bradenton	11%	6%
Miami	6%	5%
Ft. Lauderdale	9%	5%
Clearwater	3%	2%
West Palm Beach	6%	2%
St. Petersburg	5%	1%
Other	3%	4%

[1] Multiple responses permitted.



* Visitors staying in paid accommodations.

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REASONS FOR CHOOSING AREA*

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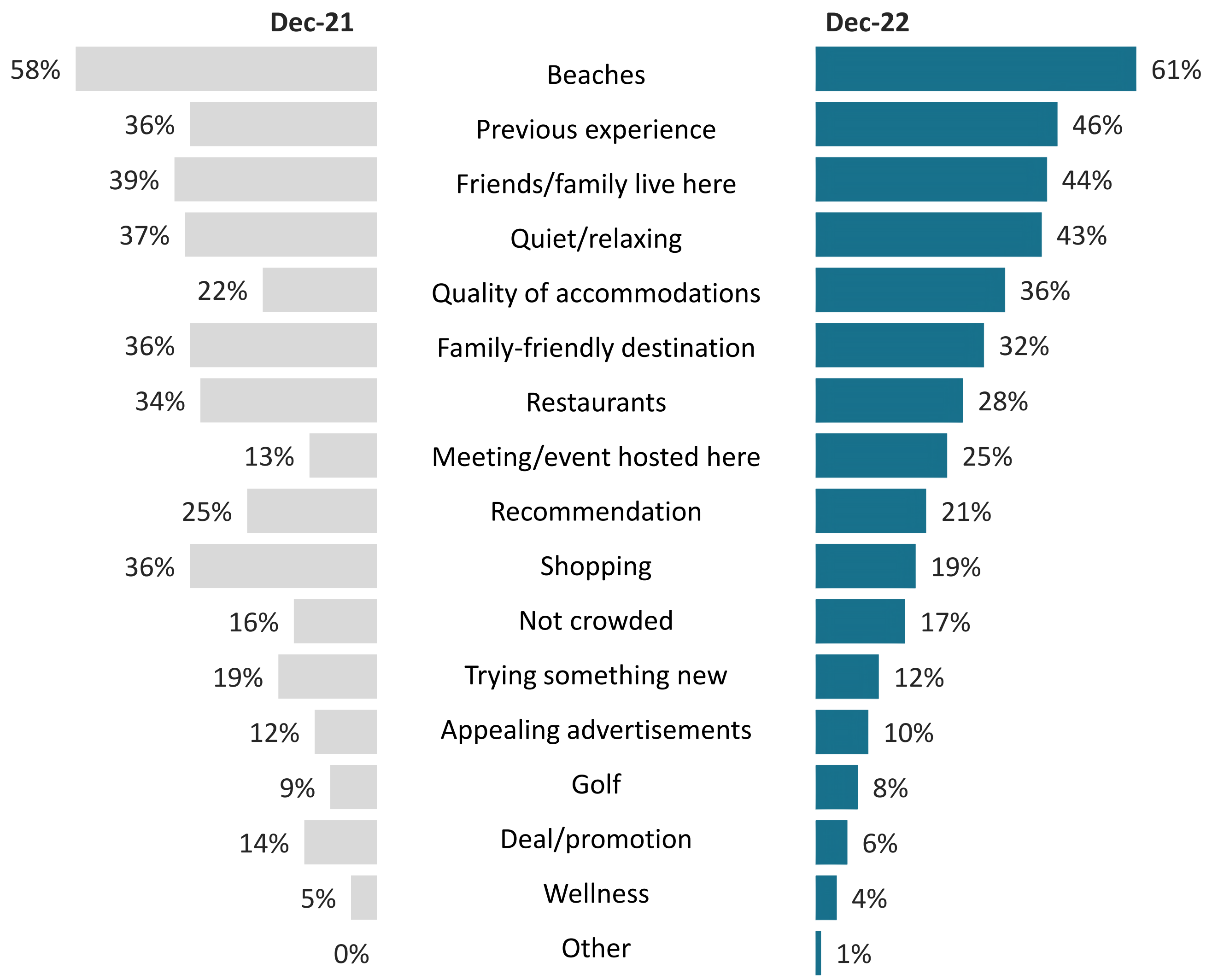
FLORIDA'S PARADISE COAST

Reasons for Choosing Area[1]		
	Dec-21	Dec-22
Beaches	58%	61%
Previous experience	36%	46%
Friends/family live here	39%	44%
Quiet/relaxing	37%	43%
Quality of accommodations	22%	36%
Family-friendly destination	36%	32%
Restaurants	34%	28%
Meeting/event hosted here	13%	25%
Recommendation	25%	21%
Shopping	36%	19%
Not crowded	16%	17%
Trying something new	19%	12%
Appealing advertisements	12%	10%
Golf	9%	8%
Deal/promotion	14%	6%
Wellness	5%	4%
Other	0%	1%

[1] Multiple responses permitted.



* Visitors staying in paid accommodations.

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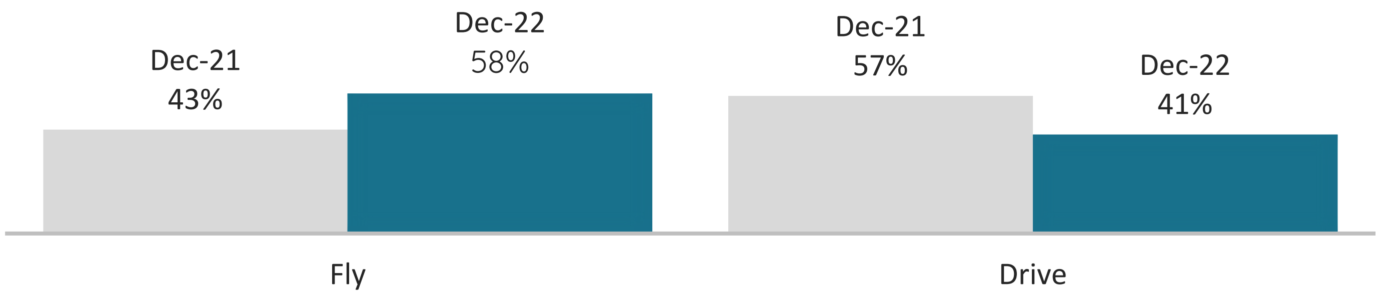
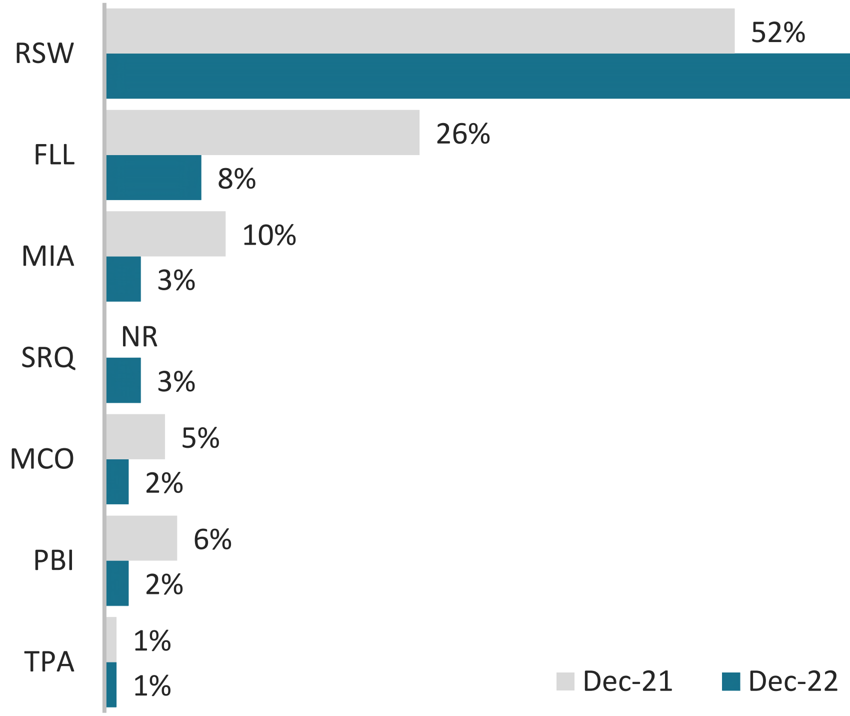
TRANSPORTATION METHODS*

Mode of Transportation		
	Dec-21	Dec-22
Fly	43%	58%
Drive	57%	41%
Other	0%	1%

Airport Deplaned (Base: Fly)		
	Dec-21	Dec-22
SWFL Intl Airport (RSW)	52%	81%
Ft. Lauderdale Intl Airport (FLL)	26%	8%
Miami Intl Airport (MIA)	10%	3%
Sarasota/Bradenton Intl (SRQ)	NR	3%
Orlando Intl Airport (MCO)	5%	2%
Palm Beach Intl (PBI)	6%	2%
Tampa Intl Airport (TPA)	1%	1%





* Visitors staying in paid accommodations.

EXPOSURE TO ADVERTISING*

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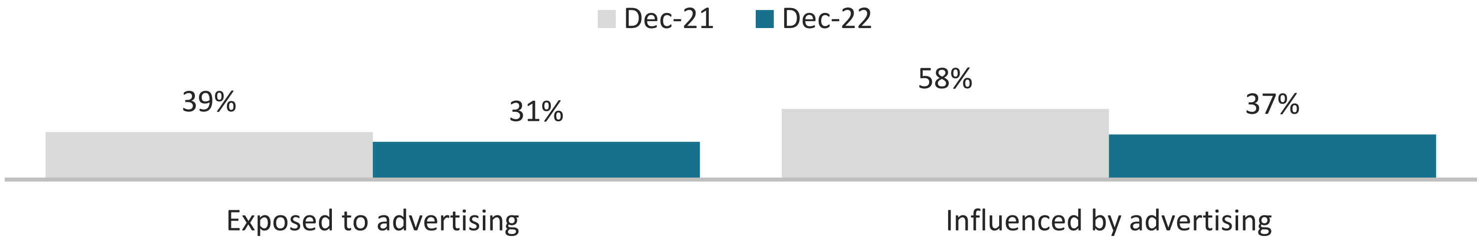
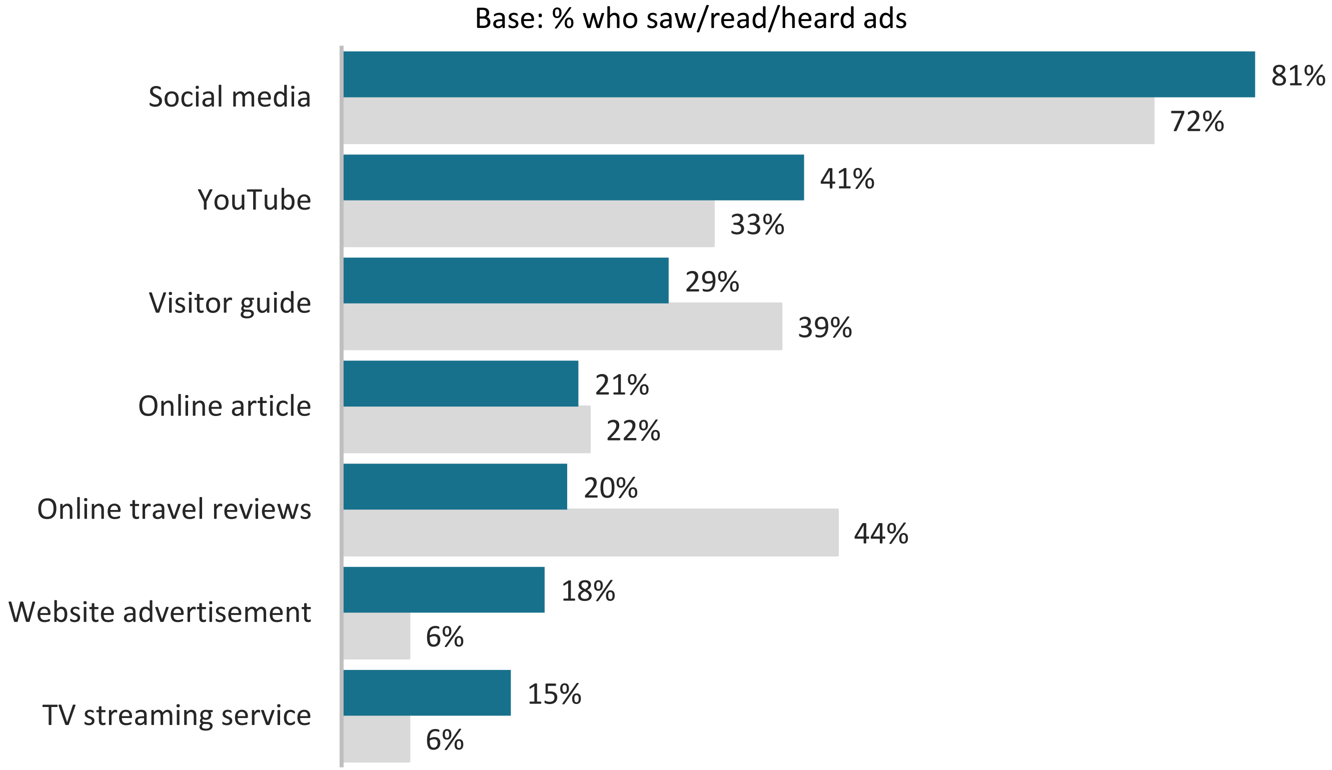
FLORIDA'S PARADISE COAST

Advertising Exposure & Influence	Dec-21	Dec-22
Exposed to advertising	39%	31%
Influenced by advertising	58%	37%



Top Advertising Sources Noticed[1]	Dec-21	Dec-22
Social media	72%	81%
YouTube	33%	41%
Visitor guide	39%	29%
Online article	22%	21%
Online travel reviews	44%	20%
Website advertisement	6%	18%
TV streaming service	6%	15%

[1] Base: % exposed to advertising. Multiple responses permitted.



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TRAVEL PARTIES*

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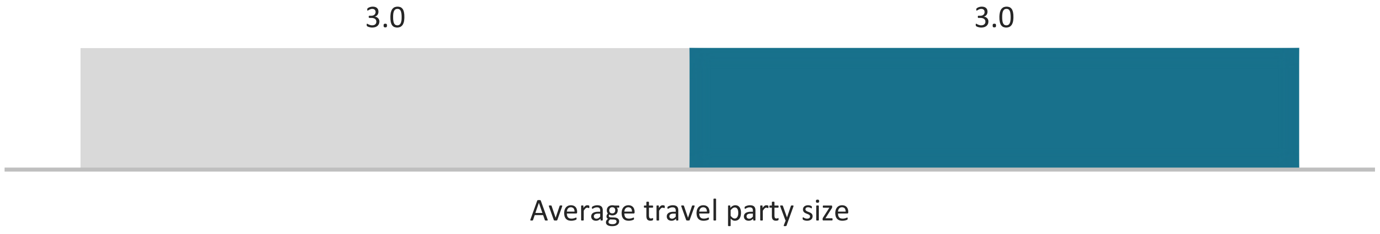
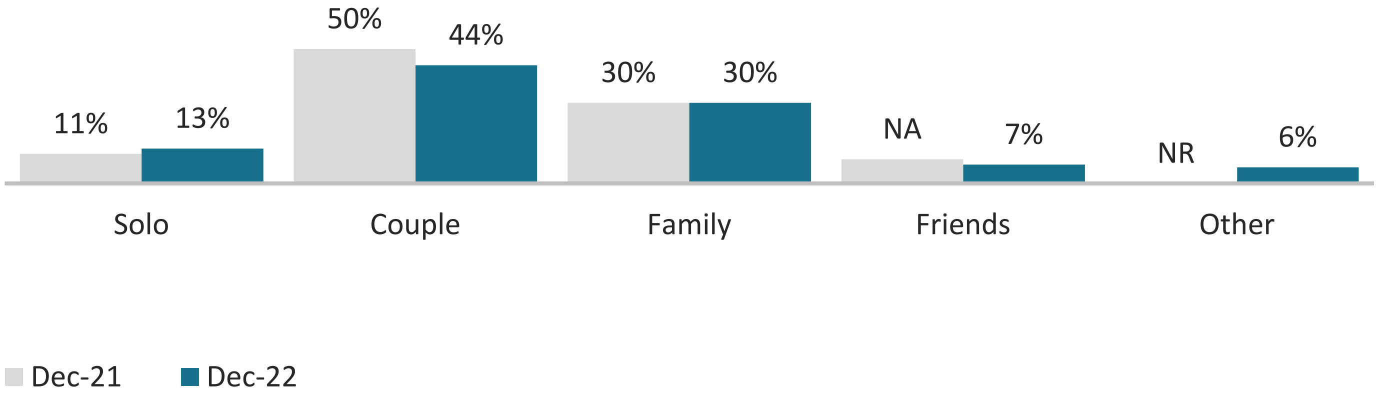
FLORIDA'S PARADISE COAST

Average Visitors per Travel Party		
	Dec-21	Dec-22
Average travel party size	3.0	3.0



Travel Party Composition		
	Dec-21	Dec-22
Solo	11%	13%
Couple	50%	44%
Family	30%	30%
Friends	9%	7%
Other	-	6%



* Visitors staying in paid accommodations.

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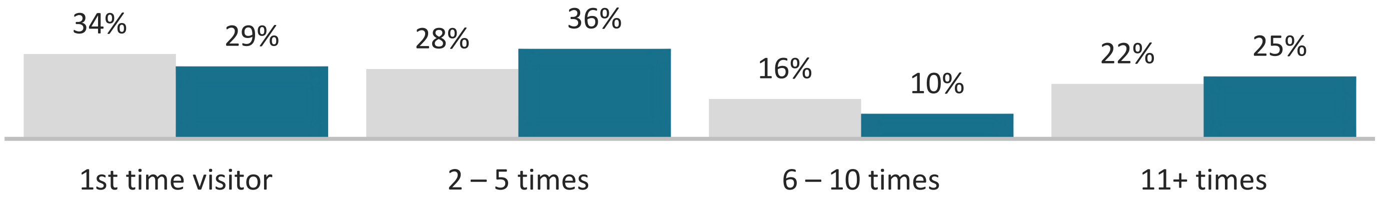
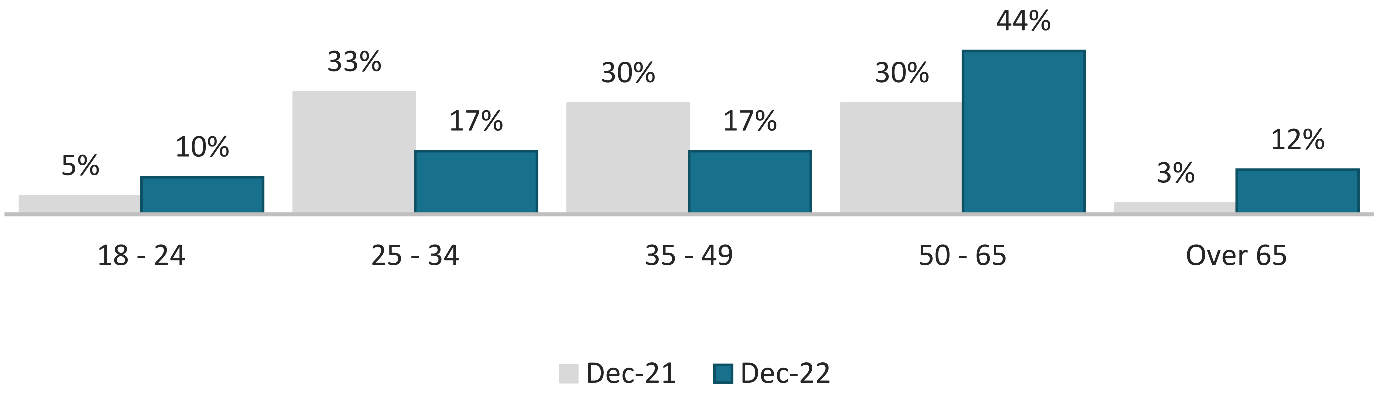
VISITING PARADISE COAST*

NAPLES • MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

Previous Visits		
	Dec-21	Dec-22
1st time visitor	34%	29%
2 – 5 times	28%	36%
6 – 10 times	16%	10%
11+ times	22%	25%



Typical Visitor Ages		
	Dec-21	Dec-22
Median Age	40.9	52.0
Average Age	42.5	49.5



* Visitors staying in paid accommodations.

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VISITOR DEMOGRAPHICS*

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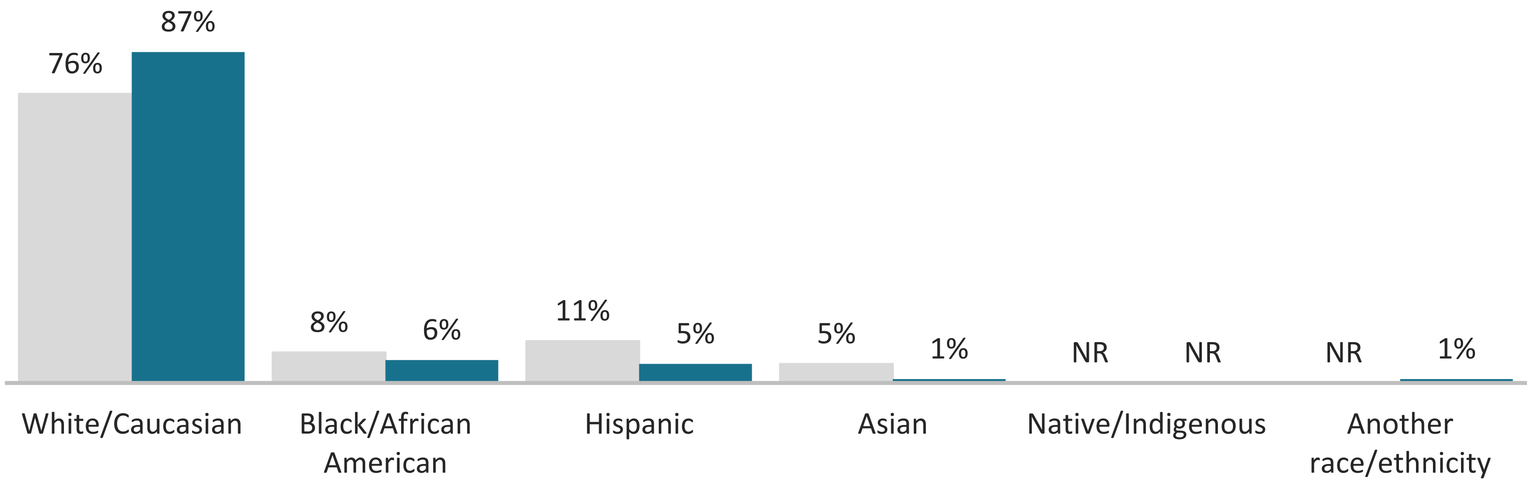
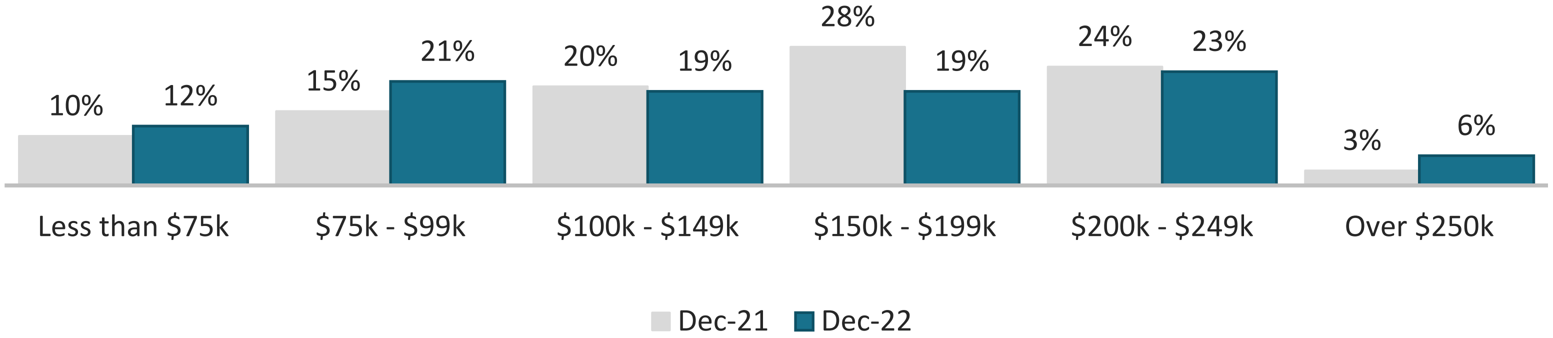
FLORIDA'S PARADISE COAST

Race/Ethnicity		
	Dec-21	Dec-22
White/Caucasian	76%	87%
Black/African American	8%	6%
Hispanic	11%	5%
Asian	5%	1%
Native/Indigenous	NR	NR
Other	NR	1%



Typical Visitor Household Income		
	Dec-21	Dec-22
Median HHI	$158,900	$144,700



* Visitors staying in paid accommodations.

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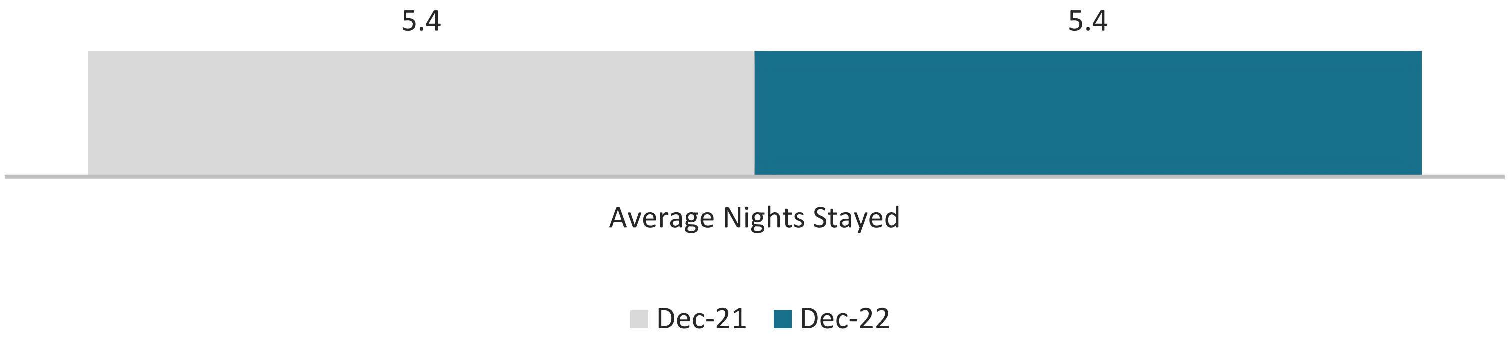
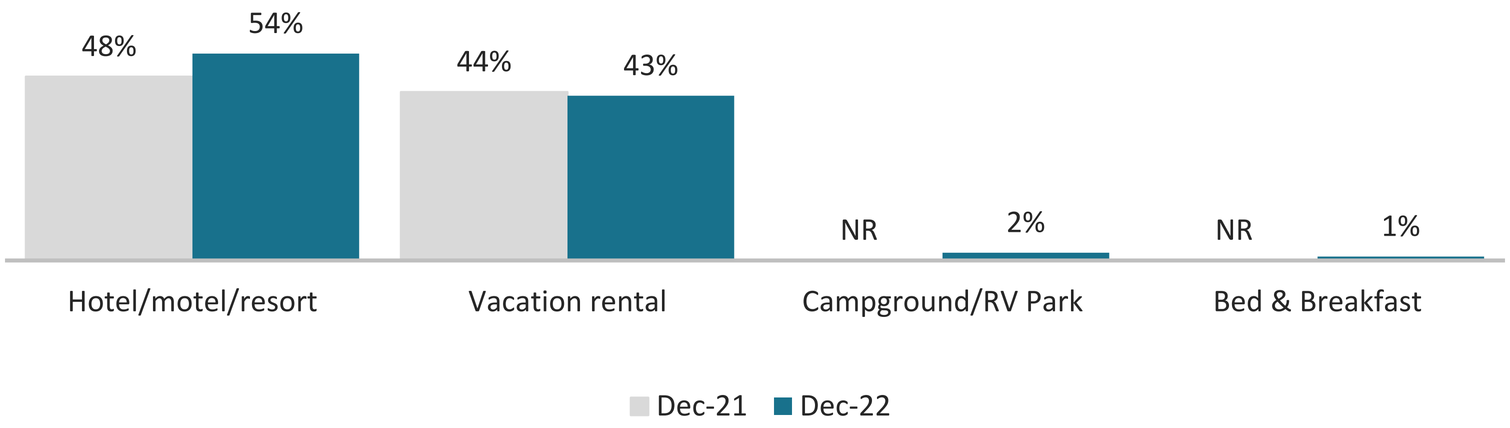
OVERNIGHT VISITS*

Nights in Destination		
	Dec-21	Dec-22
Nights Stayed (mean)	5.4	5.4



Accommodations		
	Dec-21	Dec-22
Hotel/motel/resort	48%	54%
Vacation rental	44%	43%
Campground/RV Park	NR	2%
Bed & Breakfast	NR	1%



* Visitors staying in paid accommodations.

TRIP ACTIVITIES*

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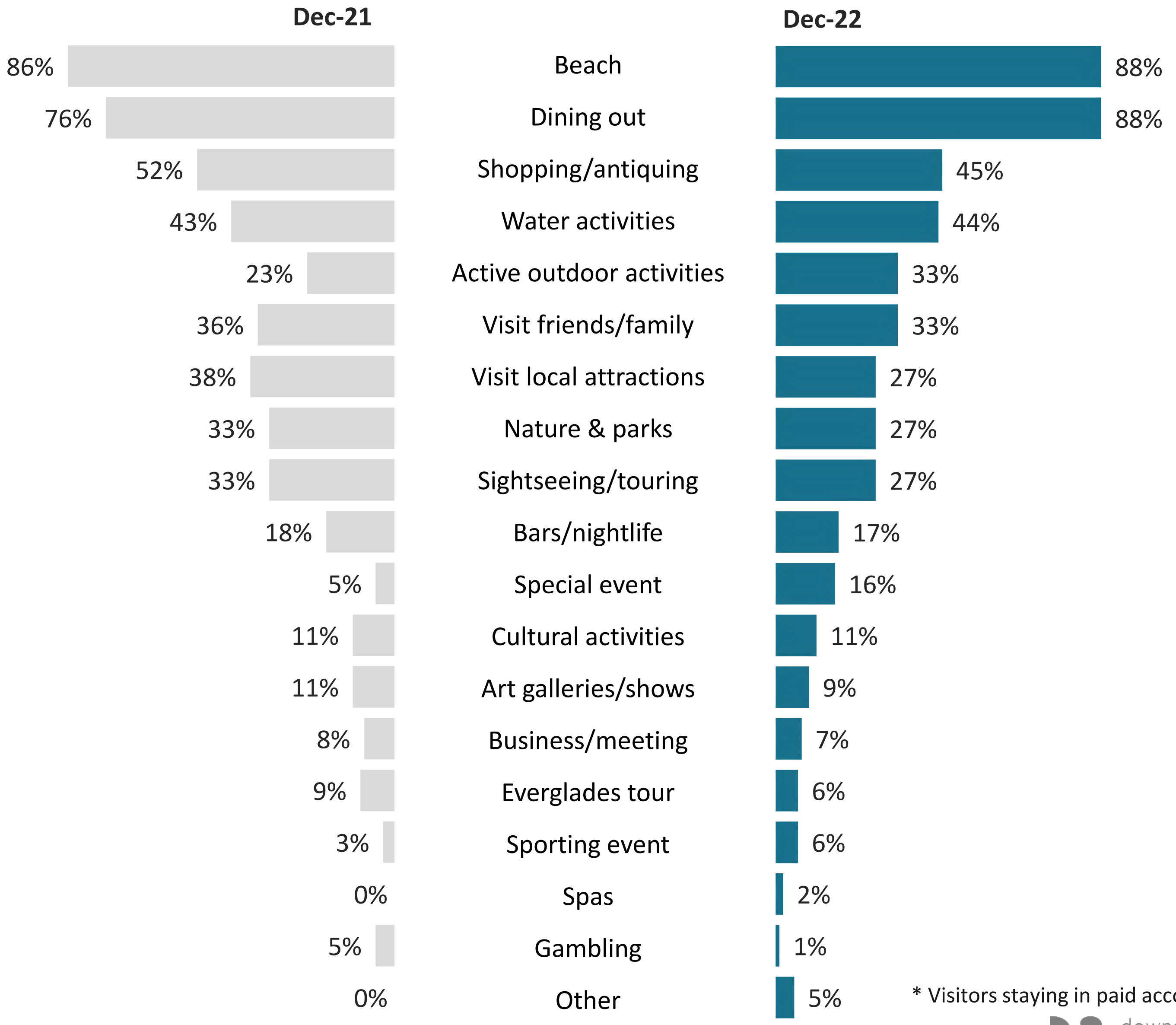
FLORIDA'S PARADISE COAST

Trip Activities[1]		
	Dec-21	Dec-22
Beach	86%	88%
Dining out	76%	88%
Shopping/antiquing	52%	45%
Water activities	43%	44%
Active outdoor activities	23%	33%
Visit friends/family	36%	33%
Visit local attractions	38%	27%
Nature & parks	33%	27%
Sightseeing/touring	33%	27%
Bars/nightlife	18%	17%
Special event	5%	16%
Cultural activities	11%	11%
Art galleries/shows	11%	9%
Business/meeting	8%	7%
Everglades tour	9%	6%
Sporting event	3%	6%
Spas	0%	2%
Gambling	5%	1%
Other	0%	5%

[1] Multiple responses permitted.



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AREAS VISITED*

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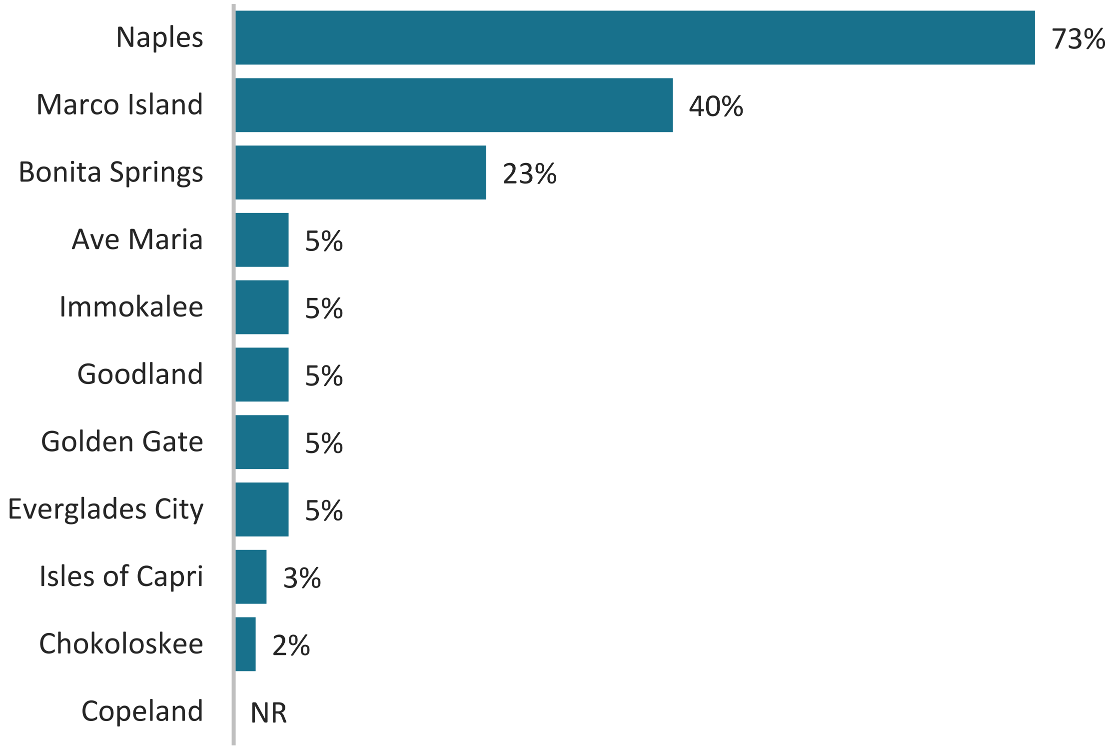
Areas Visited in Destination[1]	Dec-21	Dec-22
Naples	-	73%
Marco Island	-	40%
Bonita Springs	-	23%
Everglades City	-	5%
Golden Gate	-	5%
Goodland	-	5%
Immokalee	-	5%
Ave Maria	-	5%
Isles of Capri	-	3%
Chokoloskee	-	2%
Copeland	-	0%
Not sure	-	5%

[1] Multiple responses permitted.



* Visitors staying in paid accommodations.

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VISITOR SPENDING*

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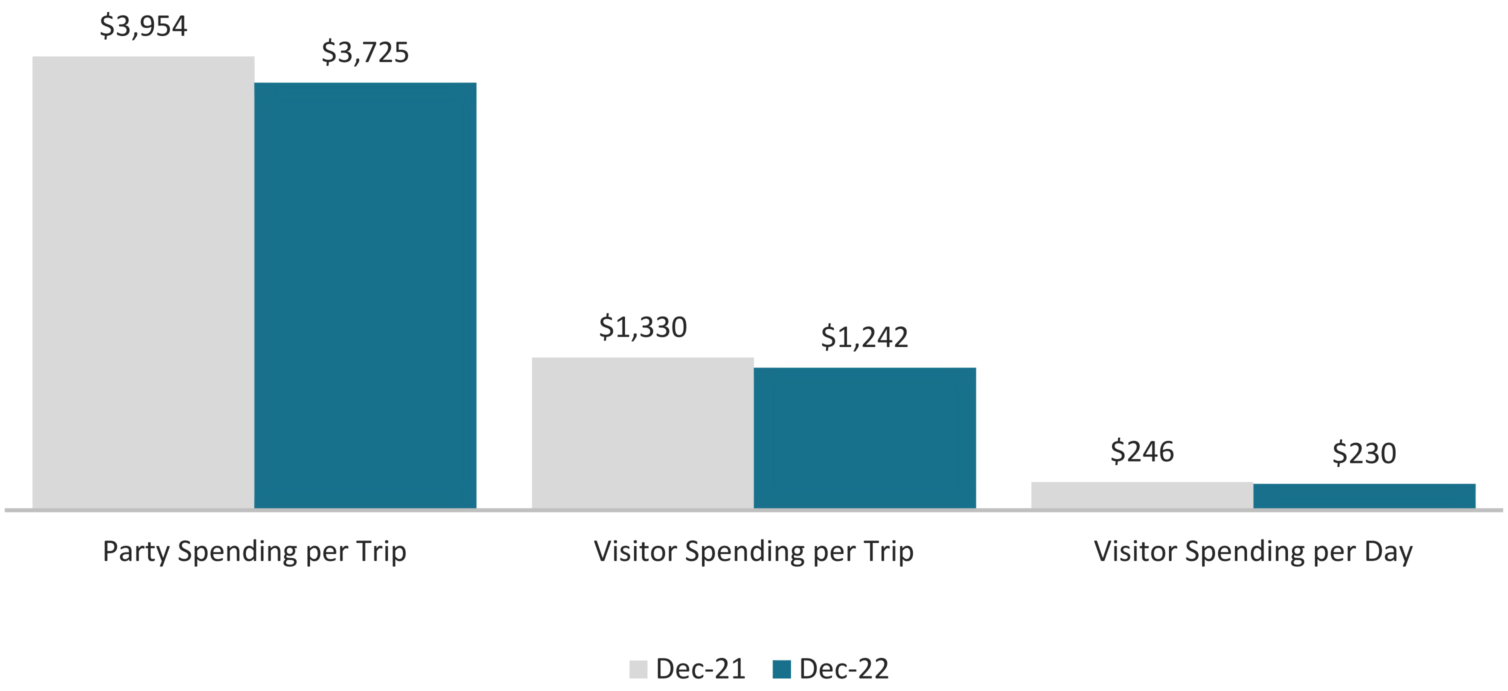
EVERGLADES
FLORIDA'S PARADISE COAST

Visitor Spending		
	Dec-21	Dec-22
Party Spending per Trip	$3,954	$3,725
Visitor Spending per Trip	$1,330	$1,242
Visitor Spending per Day	$246	$230



* Visitors staying in paid accommodations.

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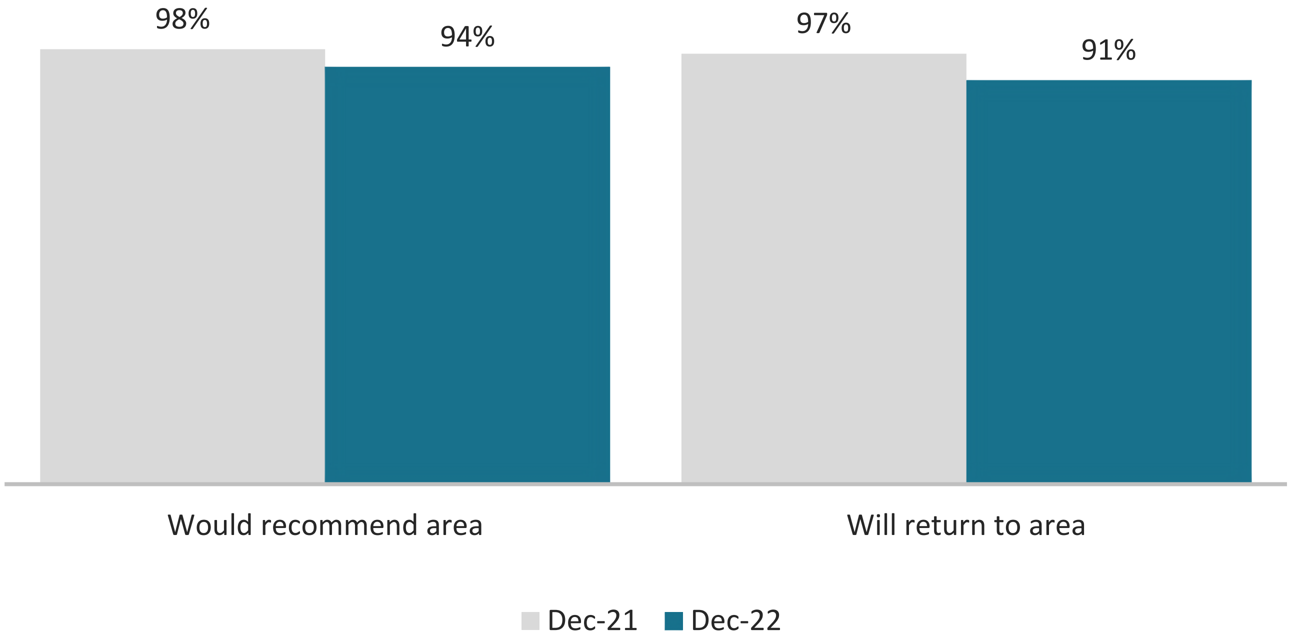
TRIP EVALUATIONS*

Satisfaction with Destination		
	Dec-21	Dec-22
Value for travel dollar[1]	8.9	8.5
Would recommend area	98%	94%
Will return to area	97%	91%

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



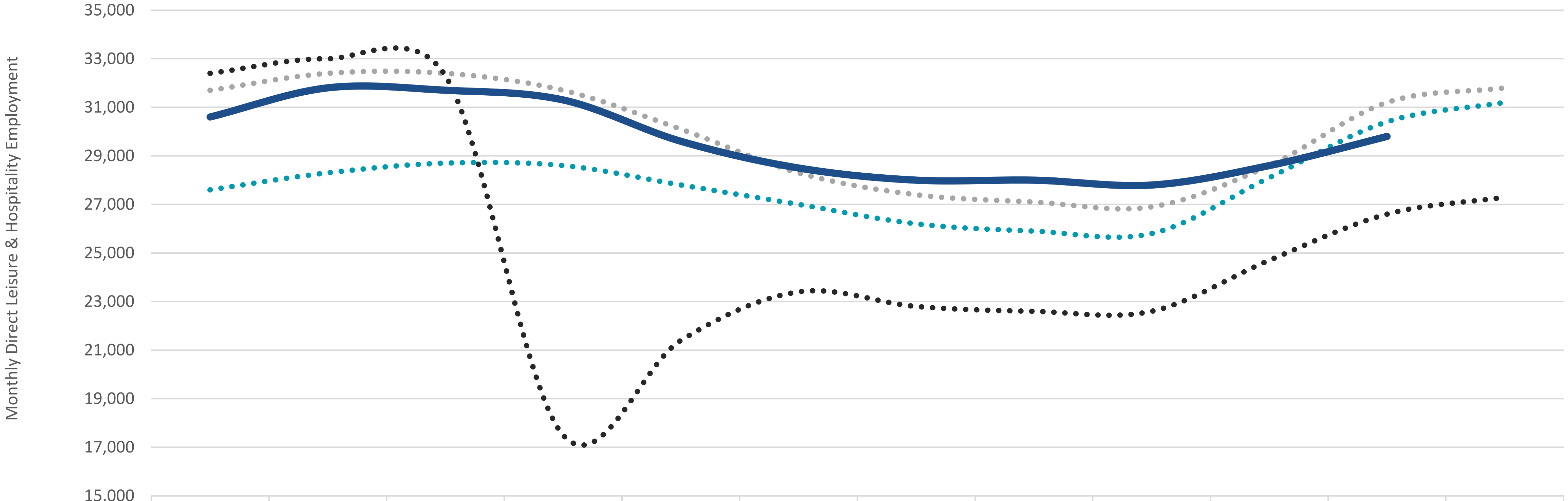
* Visitors staying in paid accommodations.

INDUSTRY DATA

LEISURE & HOSPITALTY EMPLOYMENT

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

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



	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	28,000	27,800	28,600	29,800 (P)	

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

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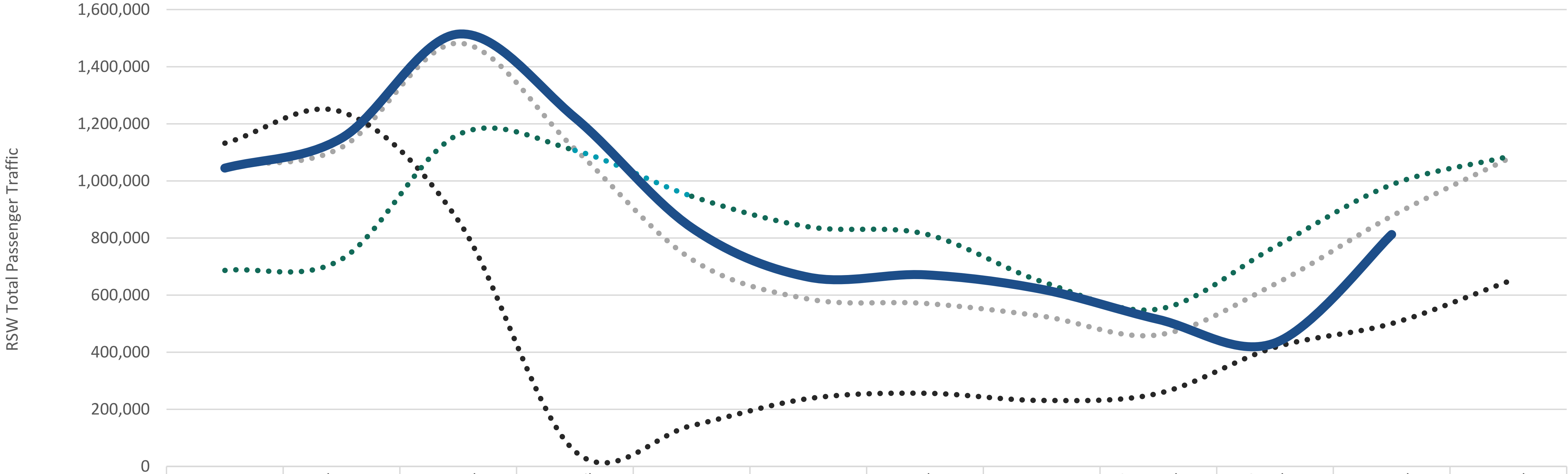
RSW PASSENGER TRAFFIC

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	620,532	515,007	432,667	812,305	

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

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LICENSED TRANSIENT RENTAL UNITS

December 2022 Licensed Transient Rental Units[1]				
	Hotel	**Motel**	**Vacation Rental**	**Total**
Naples	4,452	1,557	3,368	9,377
Marco Island	1,275	115	1,841	3,231
Immokalee	0	70	104	174
Golden Gate	0	150	0	150
Everglades City	38	36	14	88
Bonita Springs	0	5	63	68
Chokoloskee	0	13	2	15
Goodland	0	5	5	10
Ochopee	0	0	2	2
Ave Maria	0	0	1	1
Total	**5,765**	**1,951**	**5,400**	**13,116**[2]

[1] SOURCE: Florida Department of Business & Professional Regulation.
[2] Some units are likely still unavailable due to the impact of Hurricane Ian.

NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau

December 2022 Monthly Dashboard

Paul Beirnes, Executive Director
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