

# NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau  
February 2022 Monthly Dashboard





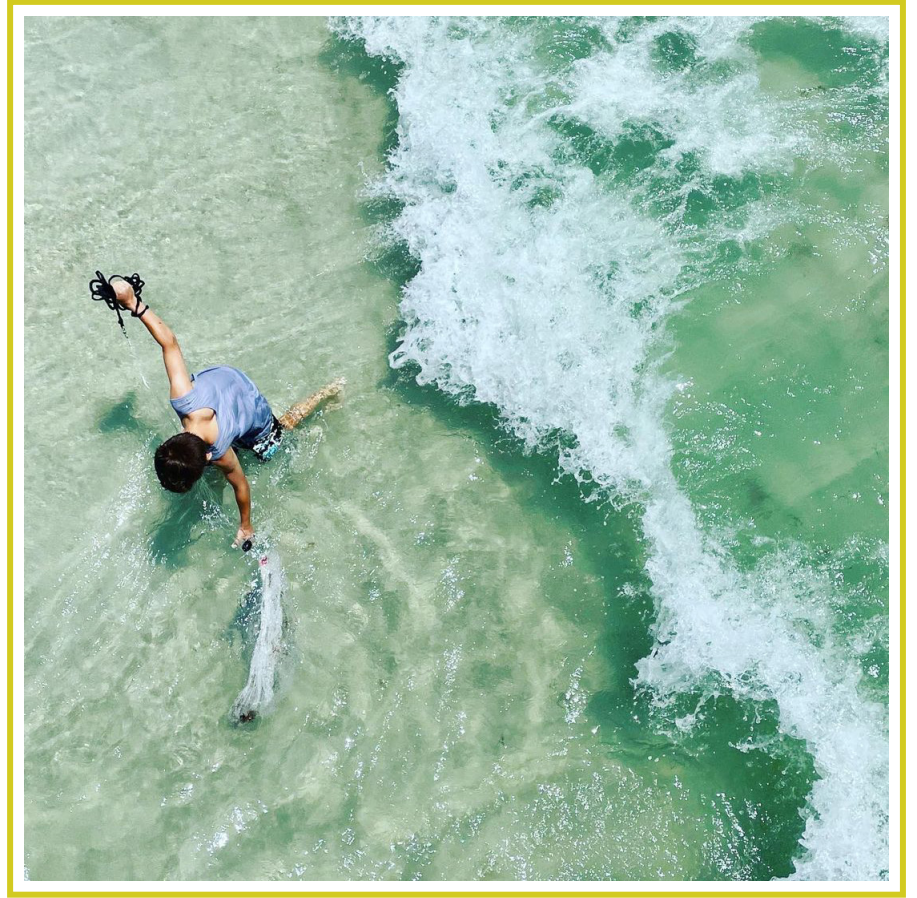
While occupancy rates have dipped moderately below pre-pandemic levels, Collier County's average room rates have remained among the highest in Florida



Social media was the primary advertising source on which February 2022 visitors to Collier County recalled seeing advertising prior to their trip



Ratings of the value per travel dollar were lower than previous months presumably due to expectations not being met because of the high average daily rate





# FEBRUARY 2022 METRICS

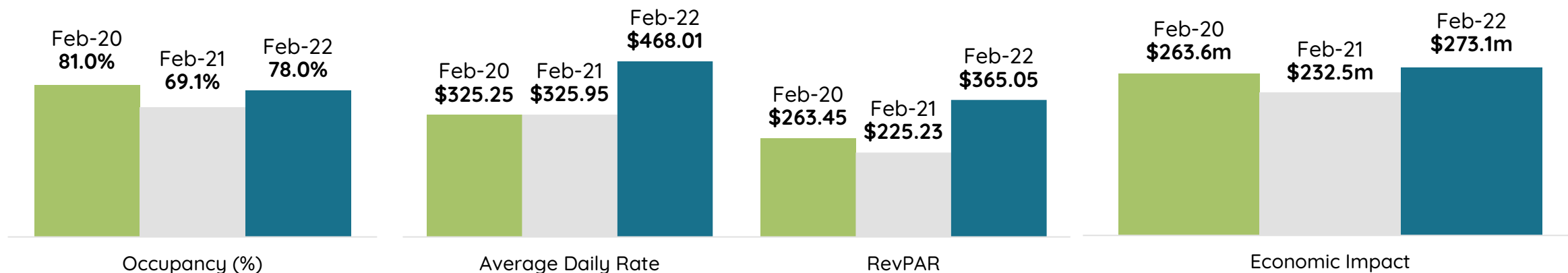


# FEBRUARY 2022 OVERNIGHT VISITATION & LODGING\*

	February 2020	February 2021	February 2022	% Change from 2020	% Change from 2021
Occupancy Rate	81.0%	69.1%	78.0%	- 3.7%	+ 12.9%
Average Daily Rate	\$325.25	\$325.95	\$468.01	+ 43.9%	+ 43.6%
RevPAR	\$263.45	\$225.23	\$365.05	+ 38.6%	+ 62.1%

	February 2020	February 2021	February 2022	% Change from 2020	% Change from 2021
Visitors	160,000	141,600	151,400	- 5.4%	+ 6.9%
Room Nights	255,000	224,700	234,400	- 8.1%	+ 4.3%
Direct Spending	\$176,776,000	\$155,955,400	\$183,156,900	+ 3.6%	+ 17.4%
Economic Impact	\$263,573,000	\$232,529,500	\$273,086,900	+ 3.6%	+ 17.4%



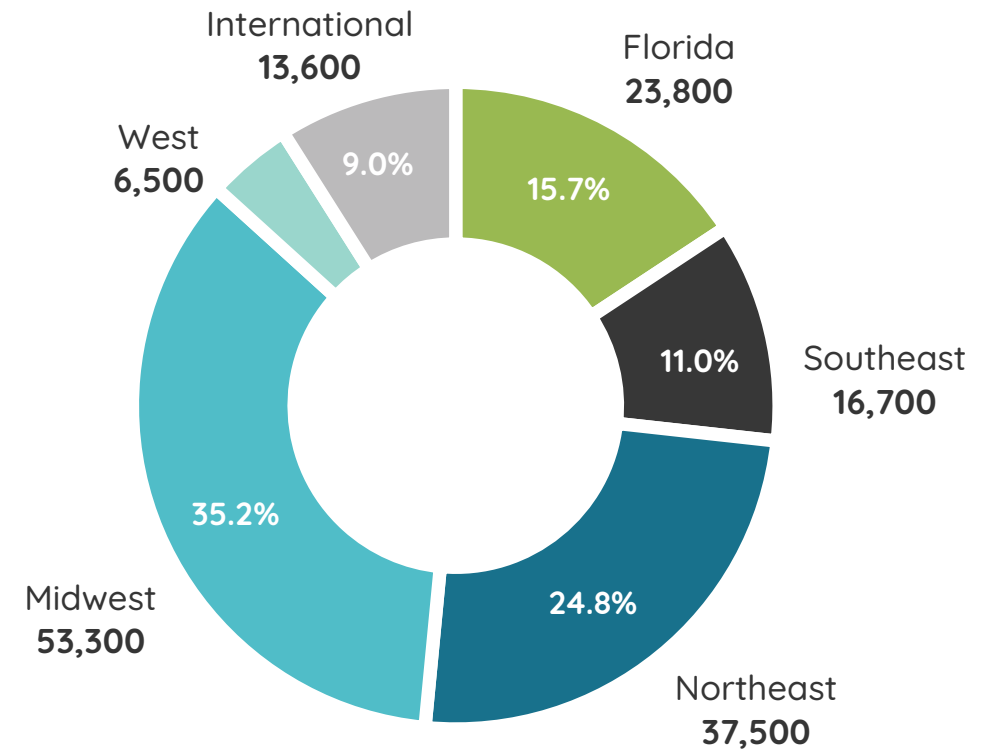
\* Visitors staying in paid accommodations.

# FEBRUARY 2022 OVERNIGHT VISITOR ORIGIN MARKETS\*

Region	February 2021		February 2022		Percent Change (Δ%)	
	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	54,400	38.4%	23,800	15.7%	- 56.3%	- 59.1%
Southeast	13,700	9.7%	16,700	11.0%	+ 21.9%	+ 13.4%
Northeast	35,700	25.2%	37,500	24.8%	+ 5.0%	- 1.6%
Midwest	31,700	22.4%	53,300	35.2%	+ 68.1%	+ 57.1%
West <sup>1</sup>	0	0.0%	6,500	4.3%	-	-
Canada <sup>2</sup>	1,400	1.0%	2,400	1.6%	+ 71.4%	+ 60.0%
Europe <sup>2</sup>	4,700	3.3%	7,700	5.1%	+ 63.8%	+ 54.5%
C/S America <sup>2</sup>	0	0.0%	1,400	0.9%	-	-
Other	0	0.0%	2,100	1.4%	-	-
<b>Total</b>	<b>141,600</b>	<b>100.0%</b>	<b>151,400</b>	<b>100.0%</b>		

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

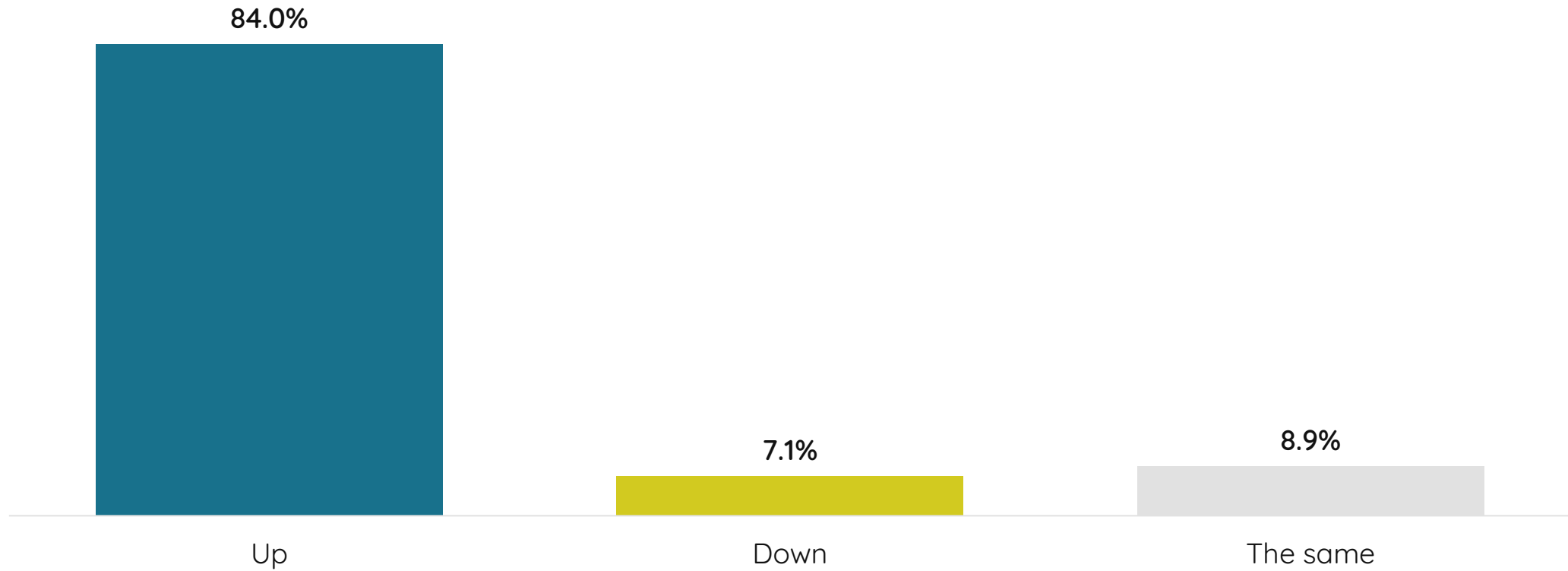
<sup>2</sup> Visitation from international markets was too small to estimate for most of 2020 and 2021.



\* Visitors staying in paid accommodations.

# OCCUPANCY BAROMETER

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

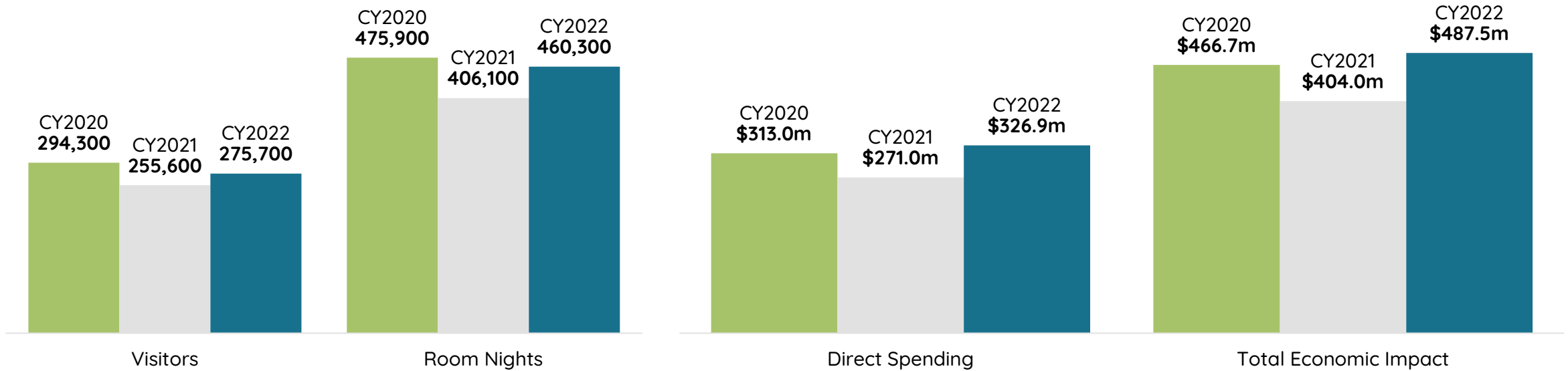


# CALENDAR YEAR- TO-DATE METRICS



# CYTD OVERNIGHT VISITATION & LODGING\*

	CYTD 2020	CYTD 2021	CYTD 2022	% Change from 2020	% Change from 2021
Visitors	294,300	255,600	275,700	- 6.3%	+ 7.9%
Room Nights	475,900	406,100	460,300	- 3.3%	+ 13.3%
Direct Spending	\$313,020,600	\$270,988,300	\$326,944,800	+ 4.4%	+ 20.6%
Economic Impact	\$466,713,700	\$404,043,600	\$487,474,700	+ 4.4%	+ 20.6%



\* Visitors staying in paid accommodations.

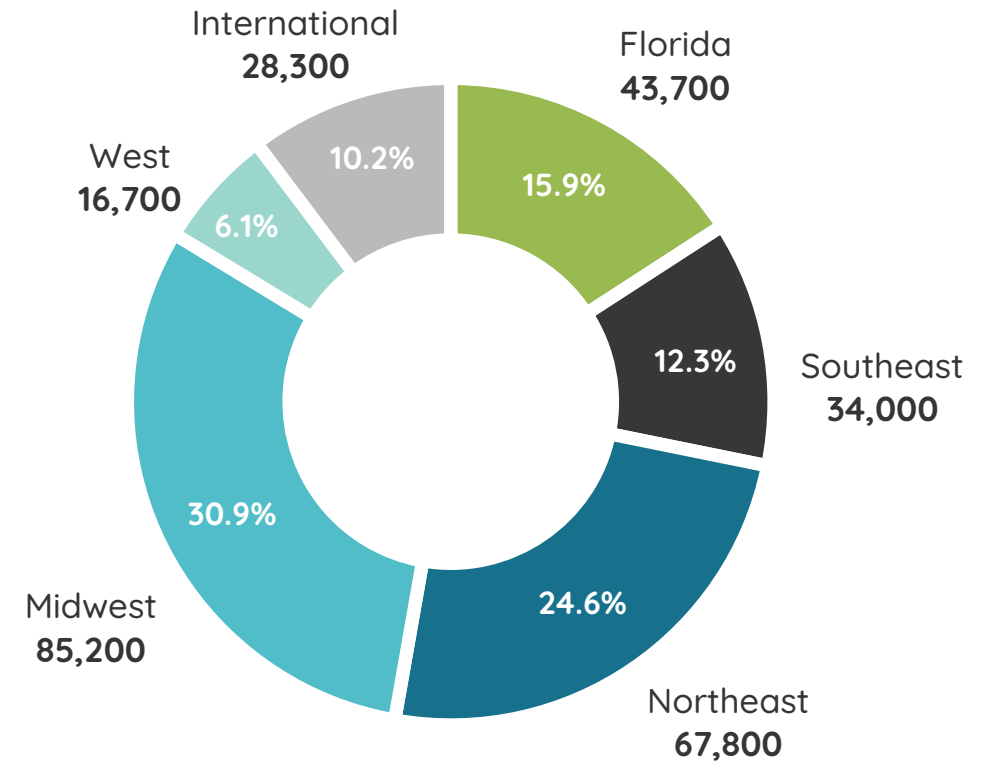


# CYTD OVERNIGHT VISITOR ORIGIN MARKETS\*

Region	CY2021		CY2022		Percent Change (Δ%)	
	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	104,700	41.0%	43,700	15.9%	- 58.3%	- 61.2%
Southeast	23,200	9.1%	34,000	12.3%	+ 46.6%	+ 35.2%
Northeast	64,900	25.4%	67,800	24.6%	+ 4.5%	- 3.1%
Midwest	52,700	20.6%	85,200	30.9%	+ 61.7%	+ 50.0%
West <sup>1</sup>	0	0.0%	16,700	6.1%	-	-
Canada <sup>2</sup>	1,900	0.7%	6,300	2.3%	+ 231.6%	+ 228.6%
Europe <sup>2</sup>	8,200	3.2%	15,400	5.6%	+ 87.8%	+ 75.0%
C/S America <sup>2</sup>	0	0.0%	2,600	0.9%	-	-
Other	0	0.0%	4,000	1.4%	-	-
<b>Total</b>	<b>255,600</b>	<b>100.0%</b>	<b>275,700</b>	<b>100.0%</b>		

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

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



\* Visitors staying in paid accommodations.

# FEBRUARY 2022 VISITOR PROFILE

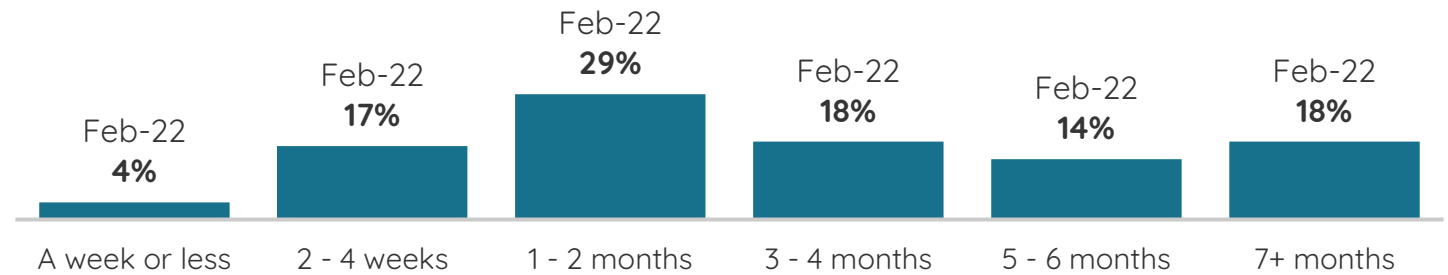
OF OVERNIGHT VISITORS



# TRIP PLANNING DECISIONS\*

## Trip Planning Cycle

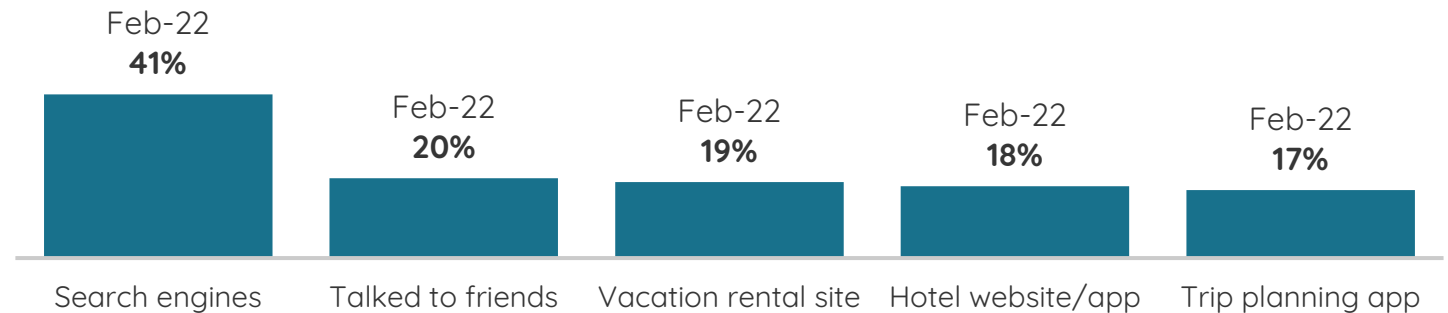
	Feb-21	Feb-22	Trend
A week or less	-	4%	-
2 - 4 weeks	-	17%	-
1 - 2 months	-	29%	-
3 - 4 months	-	18%	-
5 - 6 months	-	14%	-
7+ months	-	18%	-
Median (days)	-	62	-



## Top Trip Planning Resources<sup>1</sup>

	Feb-21	Feb-22	Trend
Search engines	-	41%	-
Talked to friends	-	20%	-
Vacation rental site	-	19%	-
Hotel website/app	-	18%	-
Trip planning app	-	17%	-

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



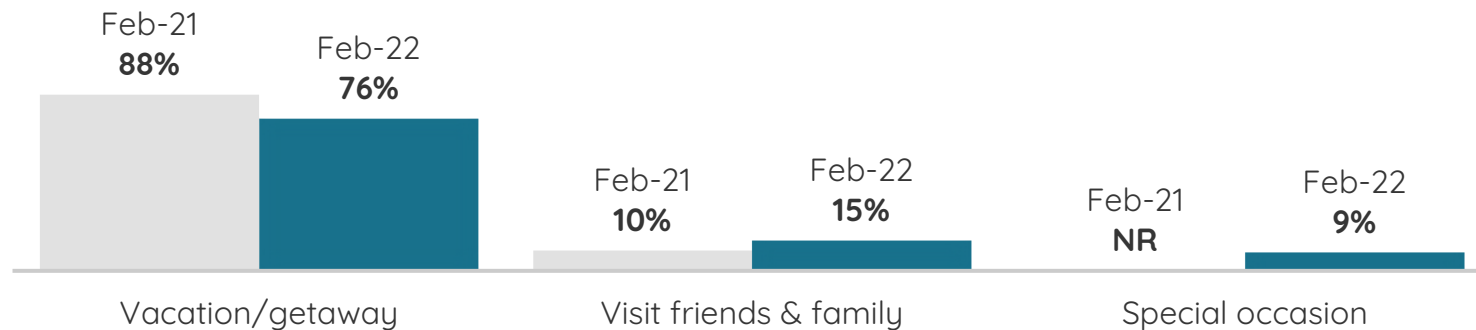
\* Visitors staying in paid accommodations.

# DECISIONS TO VISIT\*

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

	Feb-21	Feb-22	Trend
Vacation/getaway	88%	76%	↓
Visit friends & family	10%	15%	↑
Special occasion	-	9%	-

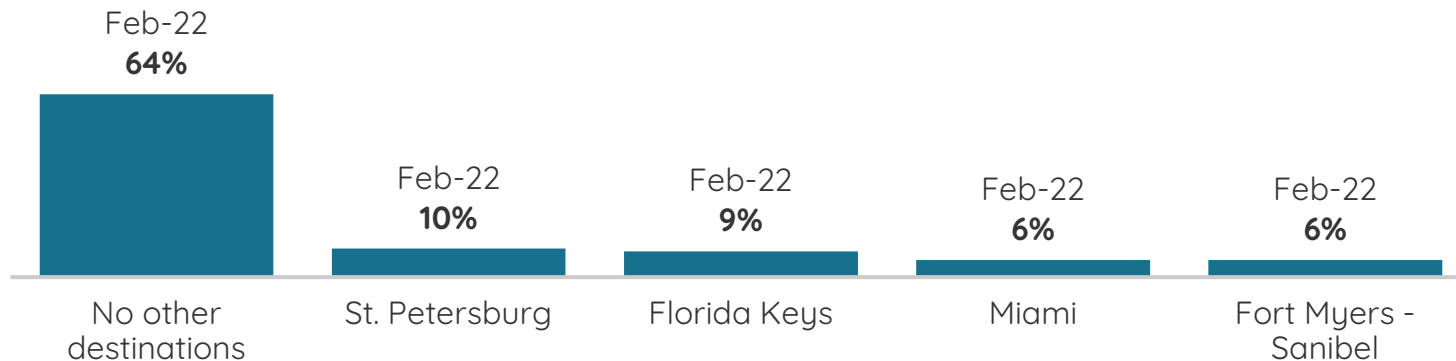
<sup>1</sup> Multiple responses permitted.



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

	Feb-21	Feb-22	Trend
No other destinations	-	64%	-
St. Petersburg	-	10%	-
Florida Keys	-	9%	-
Miami	-	6%	-
Fort Myers - Sanibel	-	6%	-

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



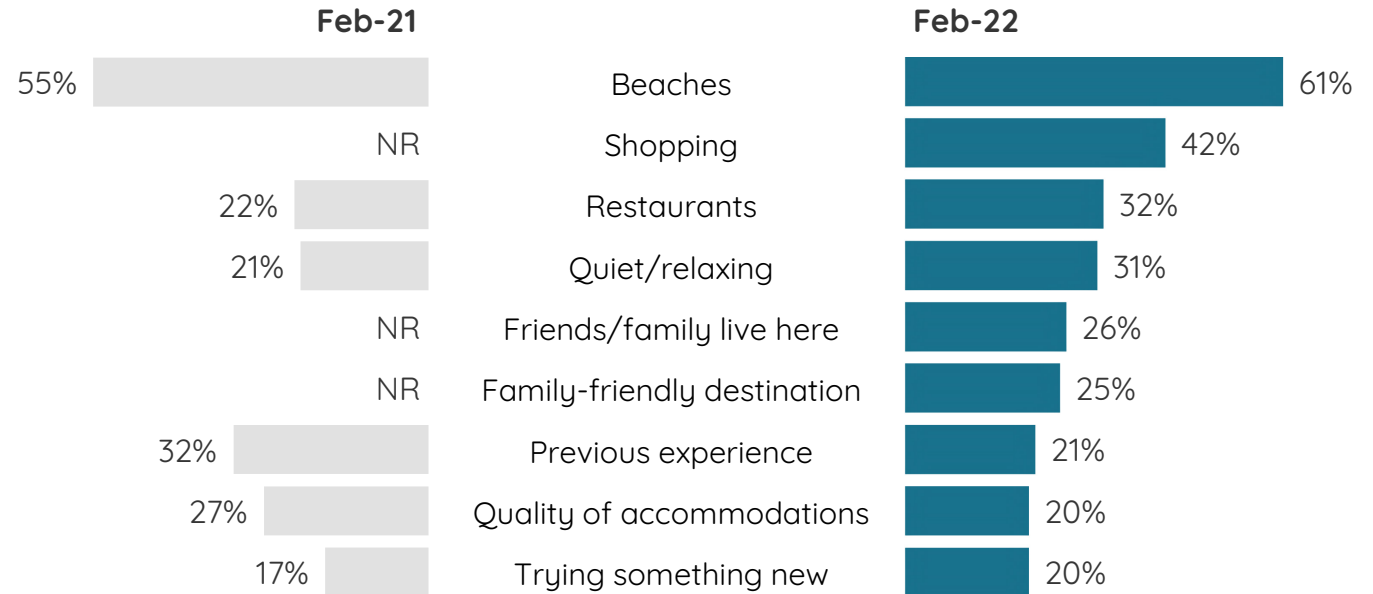
\* Visitors staying in paid accommodations.



# REASONS FOR CHOOSING AREA\*

Reasons for Choosing Area <sup>1</sup>			
	Feb-21	Feb-22	Trend
Beaches	55%	61%	↑
Shopping	-	42%	-
Restaurants	22%	32%	↑
Quiet/relaxing	21%	31%	↑
Friends/family live here	-	26%	-
Family-friendly destination	-	25%	-
Previous experience	32%	21%	↓
Quality of accommodations	27%	20%	↓
Trying something new	17%	20%	↑

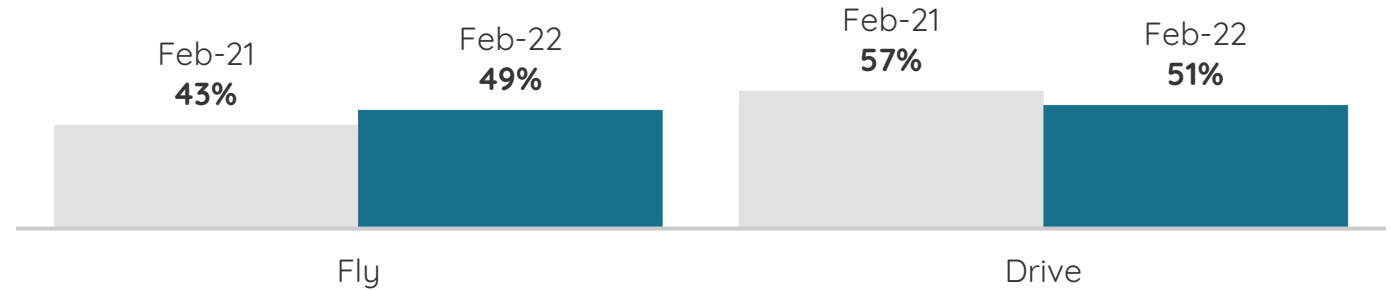
<sup>1</sup> Multiple responses permitted.



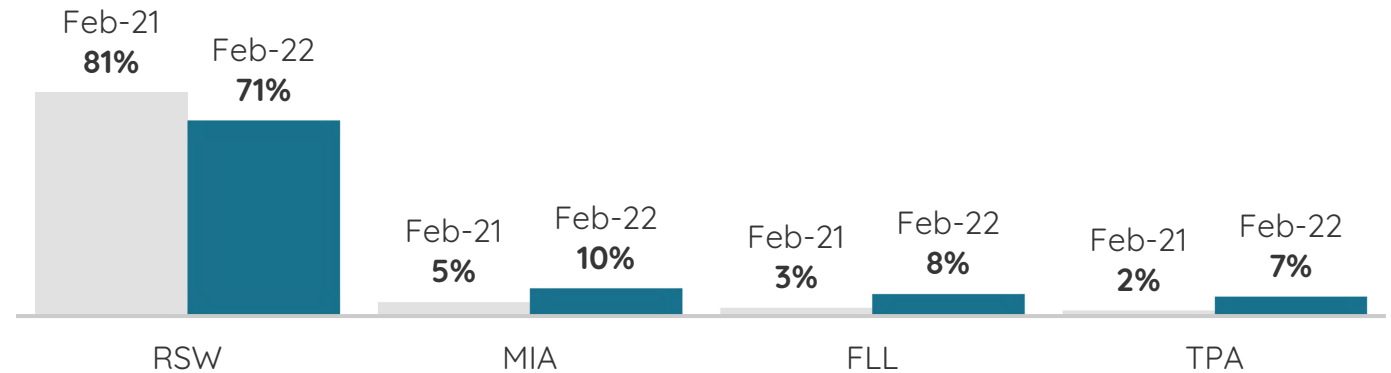
\* Visitors staying in paid accommodations.

# TRANSPORTATION METHODS\*

Mode of Transportation			
	Feb-21	Feb-22	Trend
Fly	43%	49%	↑
Drive	57%	51%	↓



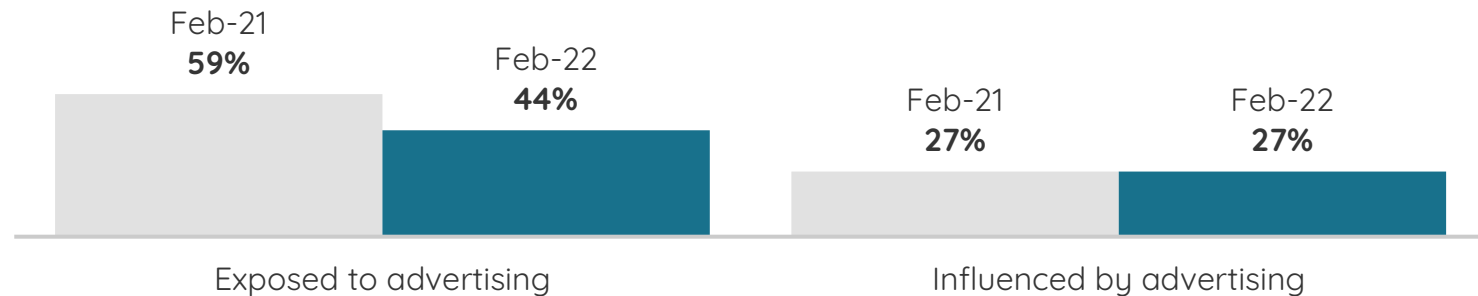
Airport Deplaned (Base: Fly)			
	Feb-21	Feb-22	Trend
SWFL Intl Airport (RSW)	81%	71%	↓
Miami Intl Airport (MIA)	5%	10%	↑
Ft. Lauderdale Intl Airport (FLL)	3%	8%	↑
Tampa Intl Airport (TPA)	2%	7%	↑



\* Visitors staying in paid accommodations.

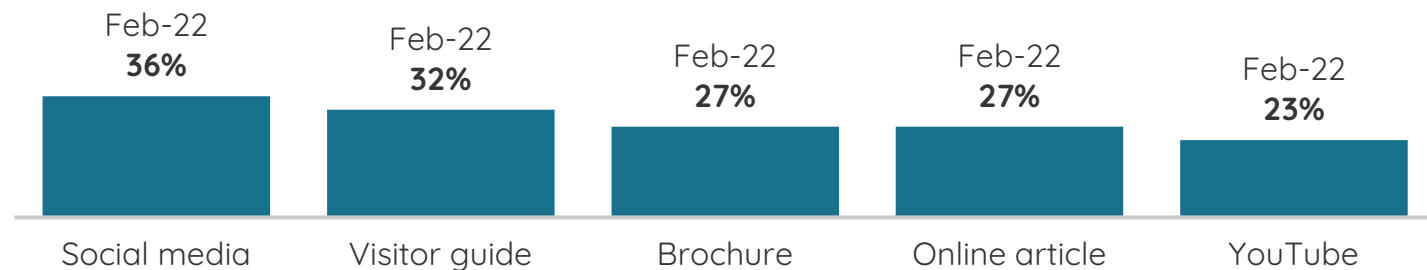
# EXPOSURE TO ADVERTISING\*

Advertising Exposure & Influence			
	Feb-21	Feb-22	Trend
Exposed to advertising	59%	44%	↓
Influenced by advertising	27%	27%	-



Top Advertising Sources Noticed <sup>1</sup>			
	Feb-21	Feb-22	Trend
Social media	-	36%	-
Visitor guide	-	32%	-
Brochure	-	27%	-
Online article	-	27%	-
YouTube	-	23%	-

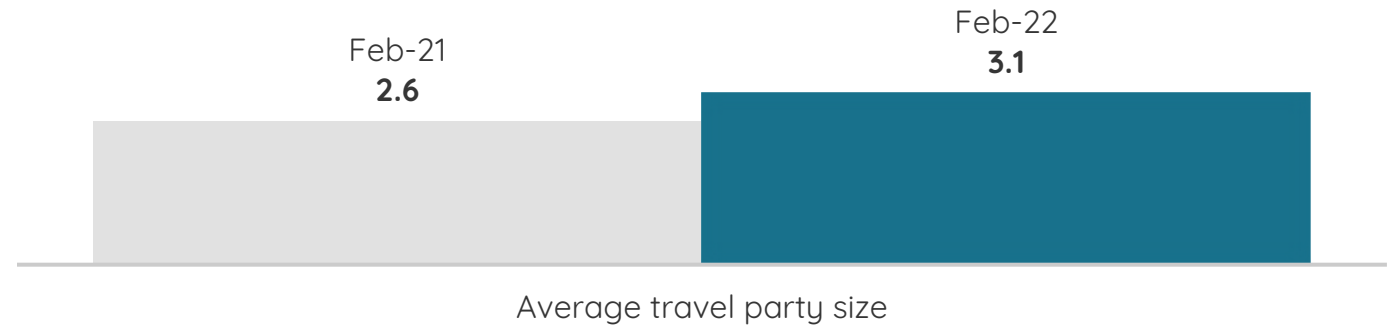
<sup>1</sup>Base of visitors exposed to advertising. Multiple responses permitted.



\* Visitors staying in paid accommodations.

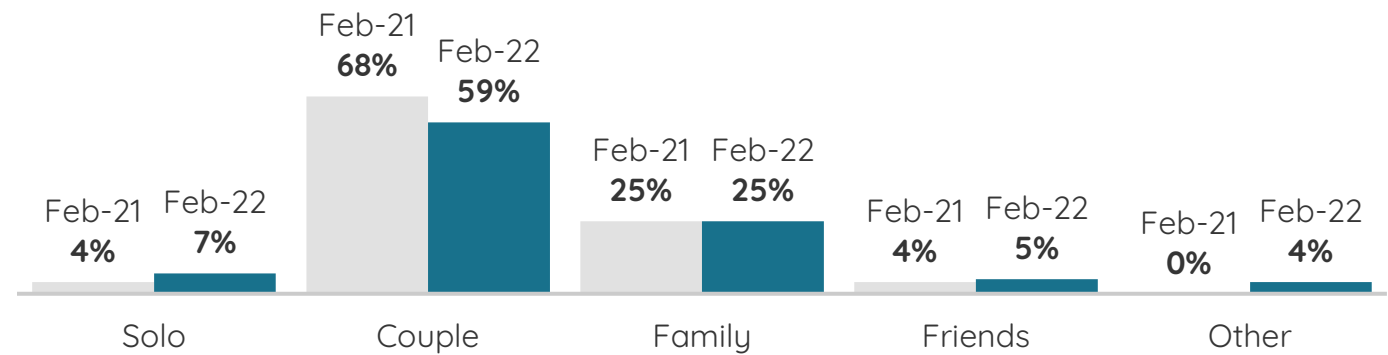
## Average Visitors per Travel Party

	Feb-21	Feb-22	Trend
Average travel party size	2.6	3.1	↑



## Travel Party Composition

	Feb-21	Feb-22	Trend
Solo	4%	7%	↑
Couple	68%	59%	↓
Family	25%	25%	-
Friends	4%	5%	↑
Other	0%	4%	↑

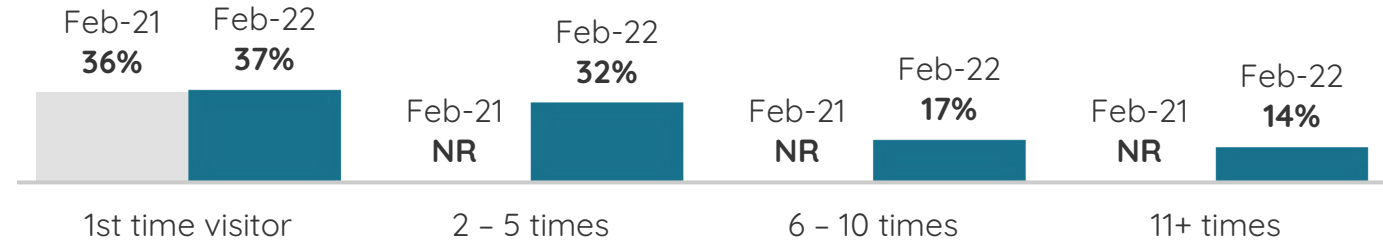


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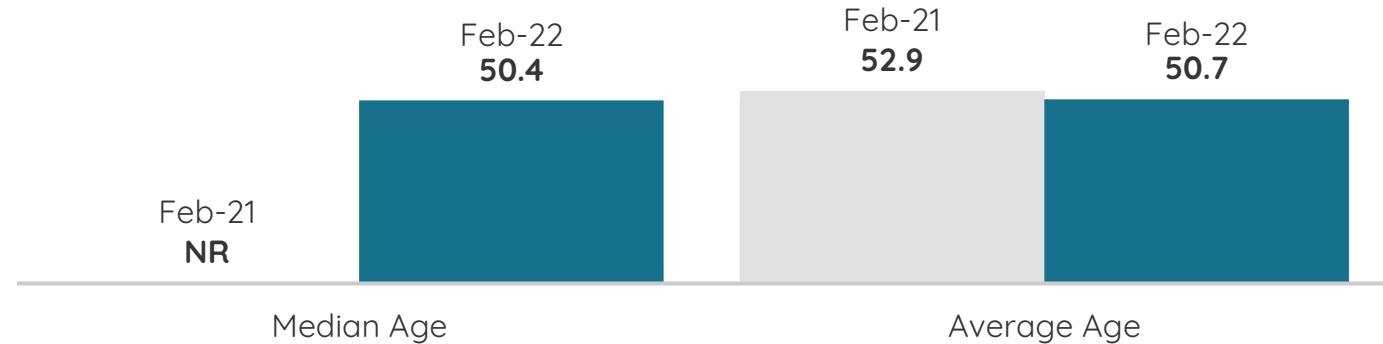


# VISITING PARADISE COAST\*

Previous Visits			
	Feb-21	Feb-22	Trend
1 <sup>st</sup> time visitor	36%	37%	↑
2 – 5 times	-	32%	-
6 – 10 times	-	17%	-
11+ times	-	14%	-



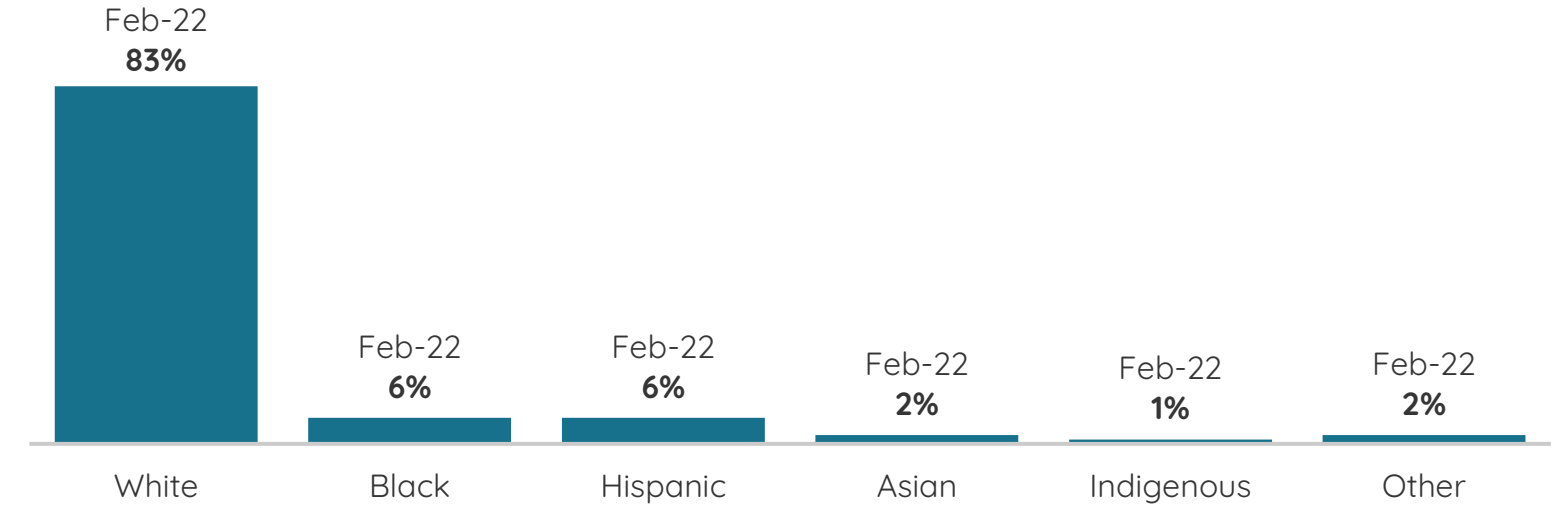
Typical Visitor Ages			
	Feb-21	Feb-22	Trend
Median Age	-	50.4	-
Average Age	52.9	50.7	↓



\* Visitors staying in paid accommodations.

# VISITOR DEMOGRAPHICS\*

Race/Ethnicity			
	Feb-21	Feb-22	Trend
White	-	83%	-
Black	-	6%	-
Hispanic	-	6%	-
Asian	-	2%	-
Indigenous	-	1%	-
Other	-	2%	-



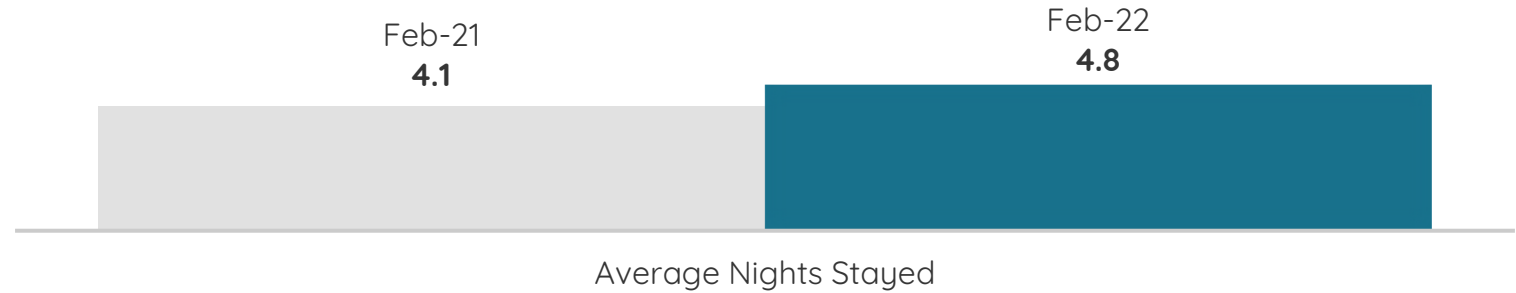
Typical Visitor Household Income			
	Feb-21	Feb-22	Trend
Median HHI	\$167,675	\$156,700	↓



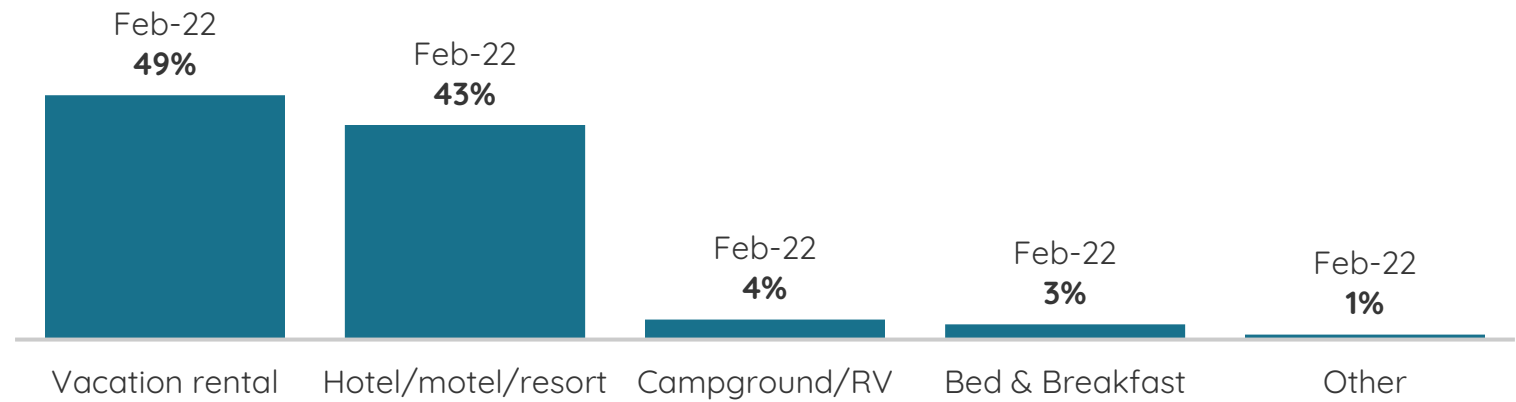
\* Visitors staying in paid accommodations.

# OVERNIGHT VISITS\*

Nights in Destination			
	Feb-21	Feb-22	Trend
Nights Stayed (mean)	4.1	4.8	↑



Accommodations			
	Feb-21	Feb-22	Trend
Vacation rental	-	49%	-
Hotel/motel/resort	-	43%	-
Campground/RV	-	4%	-
Bed & Breakfast	-	3%	-
Other	-	1%	-

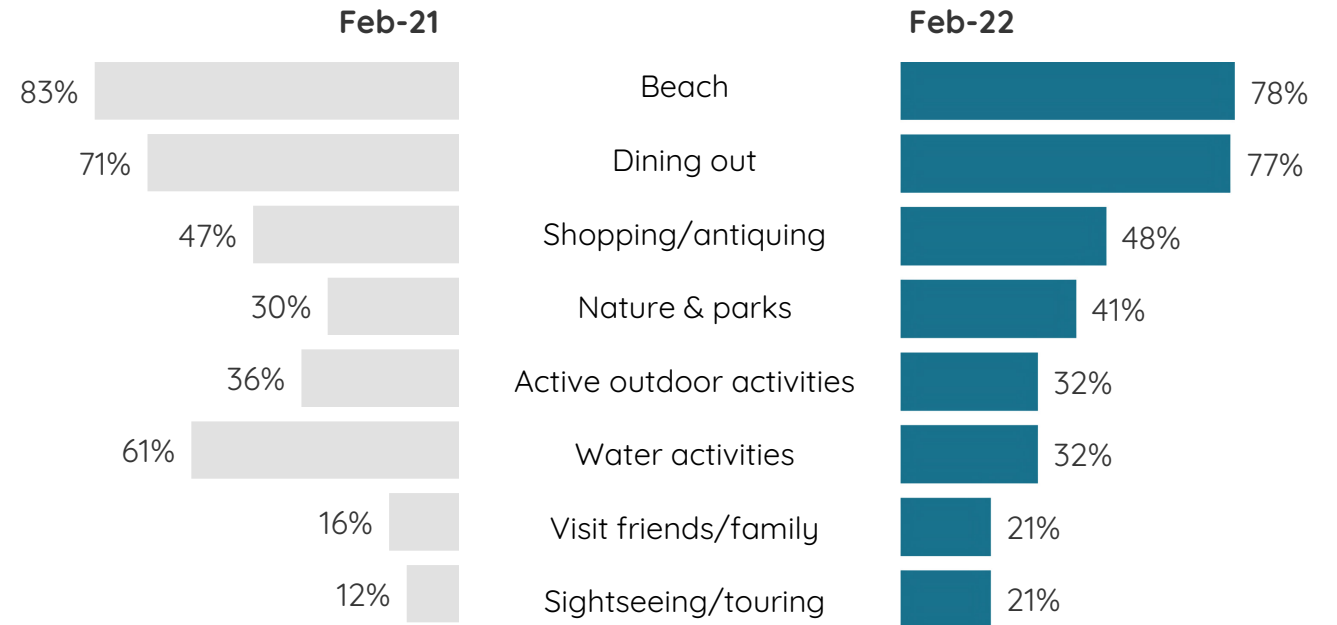


\* Visitors staying in paid accommodations.

# TRIP ACTIVITIES\*

Trip Activities <sup>1</sup>			
	Feb-21	Feb-22	Trend
Beach	83%	78%	↓
Dining out	71%	77%	↑
Shopping/antiquing	47%	48%	↑
Nature & parks	30%	41%	↑
Active outdoor activities	36%	32%	↓
Water activities	61%	32%	↓
Visit friends/family	16%	21%	↑
Sightseeing/touring	12%	21%	↑

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

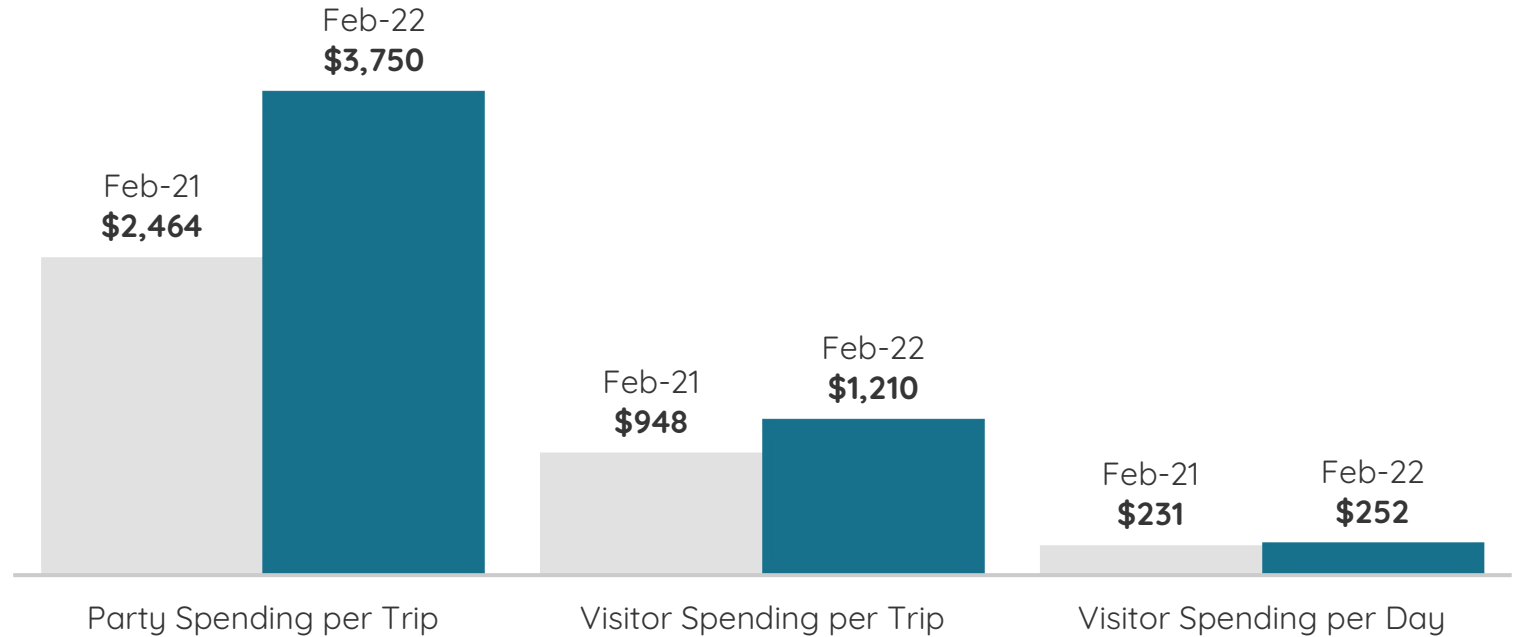


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# VISITOR SPENDING\*

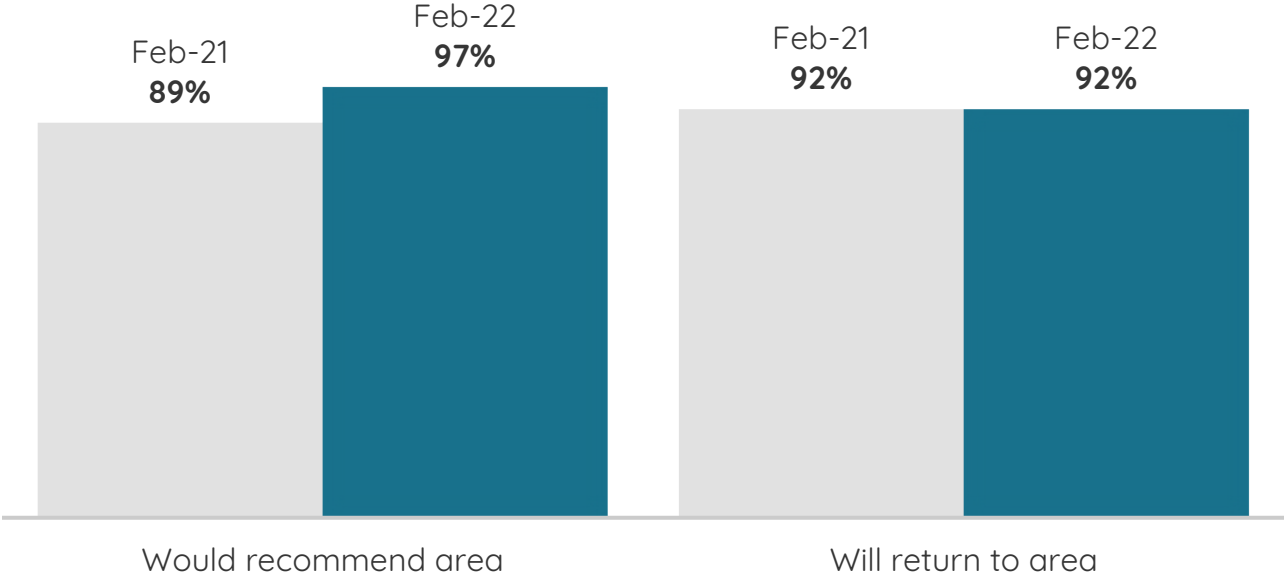
Visitor Spending			
	Feb-21	Feb-22	Trend
Party Spending per Trip	\$2,464	\$3,750	↑
Visitor Spending per Trip	\$948	\$1,210	↑
Visitor Spending per Day	\$231	\$252	↑



\* Visitors staying in paid accommodations.

Satisfaction with Destination			
	Feb-21	Feb-22	Trend
Value for travel dollar <sup>1</sup>	-	8.5	-
Would recommend area	89%	97%	↑
Will return to area	92%	92%	-

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



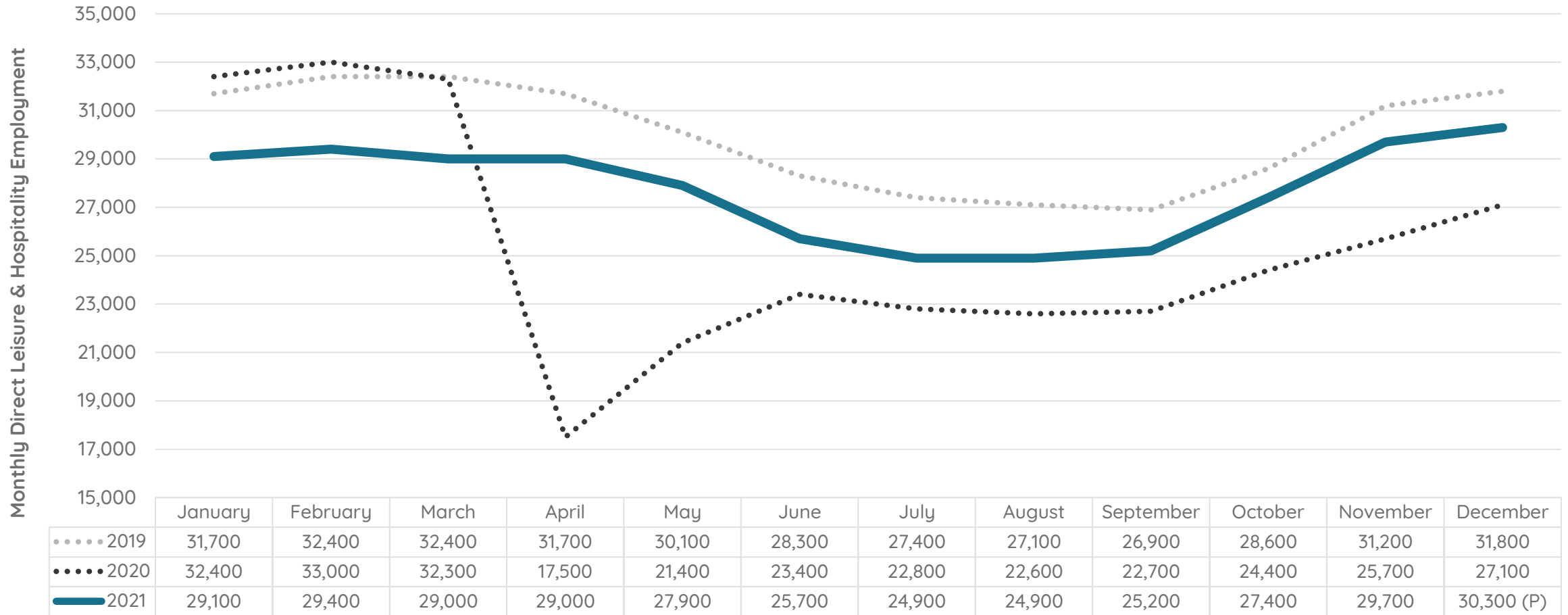
\* Visitors staying in paid accommodations.

# INDUSTRY DATA



# LEISURE & HOSPITALTY EMPLOYMENT

Collier County Direct Leisure and Hospitality Employment (Calendar Year)<sup>1</sup>

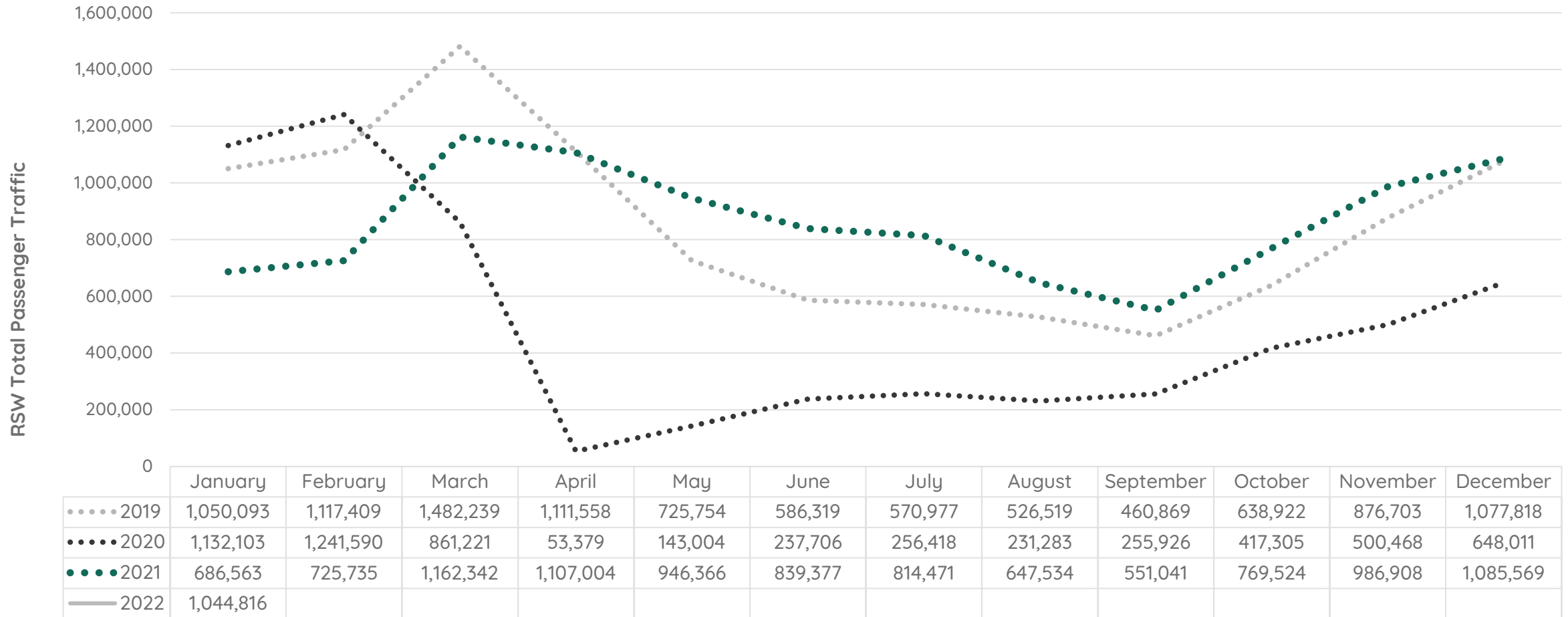


<sup>1</sup>SOURCE: Current Employment Statistic Program (CES), Collier County Leisure and Hospitality Sector, not seasonally adjusted. Figures for July 2021 are preliminary and subject to change.  
(P) Preliminary.



# RSW PASSENGER TRAFFIC

Southwest Florida International Airport (RSW) Passenger Traffic



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

# LICENSED TRANSIENT RENTAL UNITS

February 2022 Licensed Transient Rental Units <sup>1</sup>				
	Hotel	Motel	Vacation Rental	Total
Naples	4,530	1,566	1,348	7,444
Marco Island	1,378	115	1,357	2,850
Immokalee	0	70	105	175
Golden Gate	0	150	0	150
Everglades City	38	36	14	88
Chokoloskee	0	13	0	13
Bonita Springs	0	5	2	7
Goodland	0	5	0	5
Isles of Capri	0	0	1	1
<b>Total</b>	<b>5,946</b>	<b>1,960</b>	<b>2,827</b>	<b>10,733</b>

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

# NAPLES, MARCO ISLAND, EVERGLADES

## Convention & Visitors Bureau February 2022 Monthly Dashboard

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