NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau
February 2023 Monthly Dashboard

NAPLES · MARCO ISLAND
EVERGLADES
FLORIDA'S PARADISE COAST

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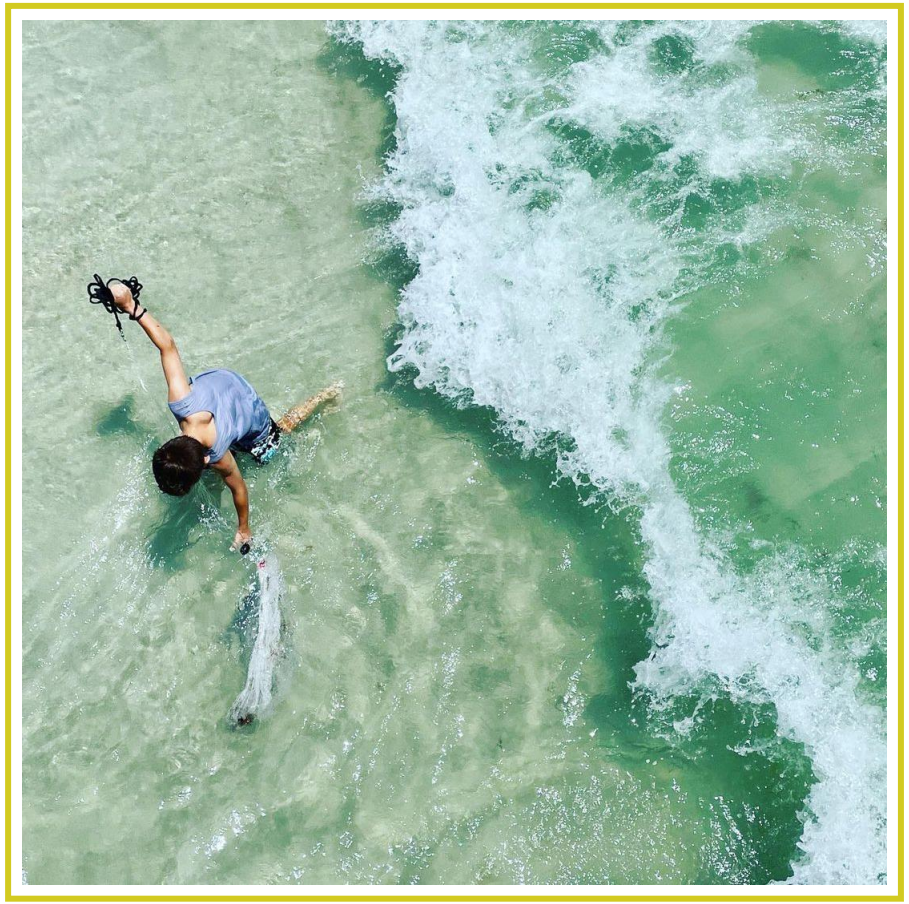
RESEARCH

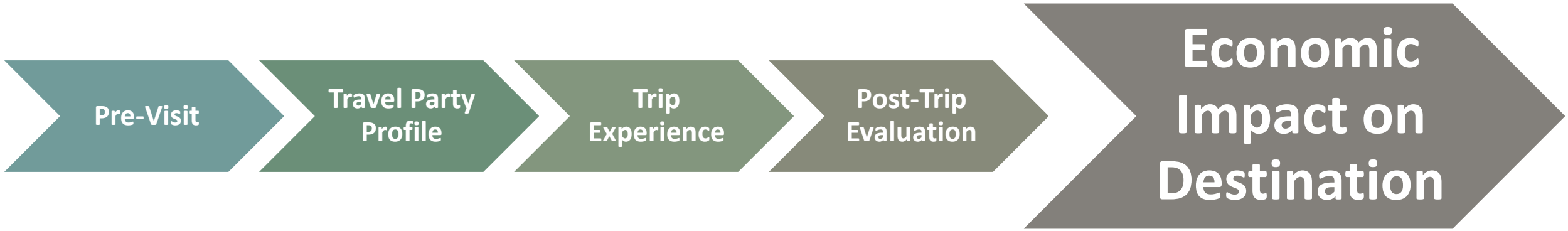
MONTHLY SNAPSHOT

- 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.
- Both hotel as well as overall lodging metrics saw decreases in February 2023 when compared to the record-breaking February 2022.
- Visitation remained relatively stable compared to last year, however, increased levels of visitation from within Florida continue to be observed likely due to hurricane recovery.
- A higher percentage of February 2023 visitors noticed and were influenced by advertising/promotions compared to February 2022.
- Compared to February 2022, less visitors chose to come to the Naples area because of the beaches while more visitors chose to come to the Naples area to visit friends and family or for sports.
- Satisfaction metrics post-hurricane continue to lag behind metrics from the previous year.



VISITOR JOURNEY: ECONOMIC IMPACT

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST



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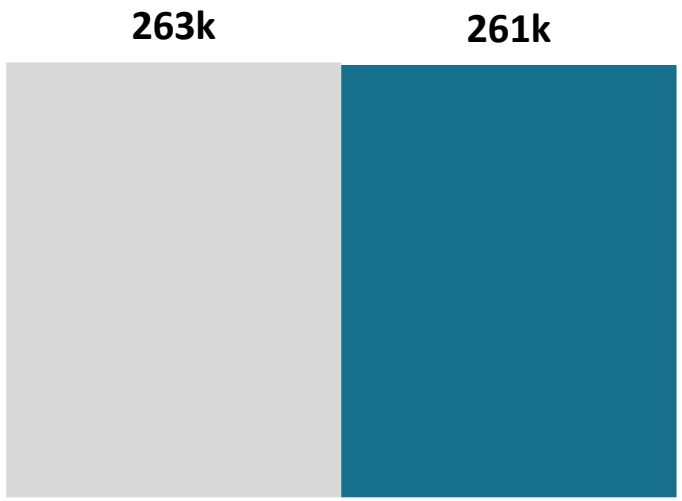
FEBRUARY 2023 VISITATION & ROOM NIGHTS

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

VISITORS

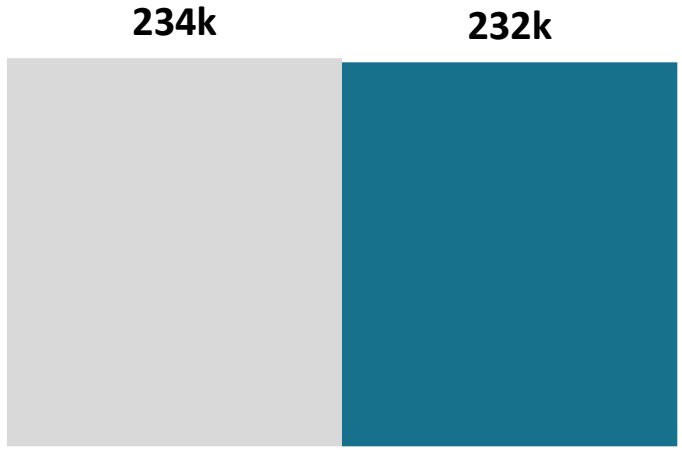
262,600



- 0.6% from 2022

ROOM NIGHTS

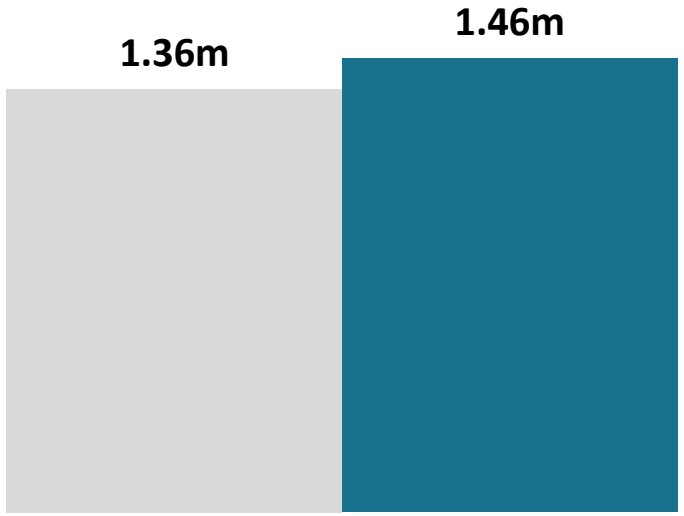
228,200



- 1.1% from 2022

VISITOR DAYS

1,461,600



+ 7.2% from 2022

Feb-22 Feb-23

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FEBRUARY 2023 SPENDING & ECONOMIC IMPACT

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FLORIDA'S PARADISE COAST

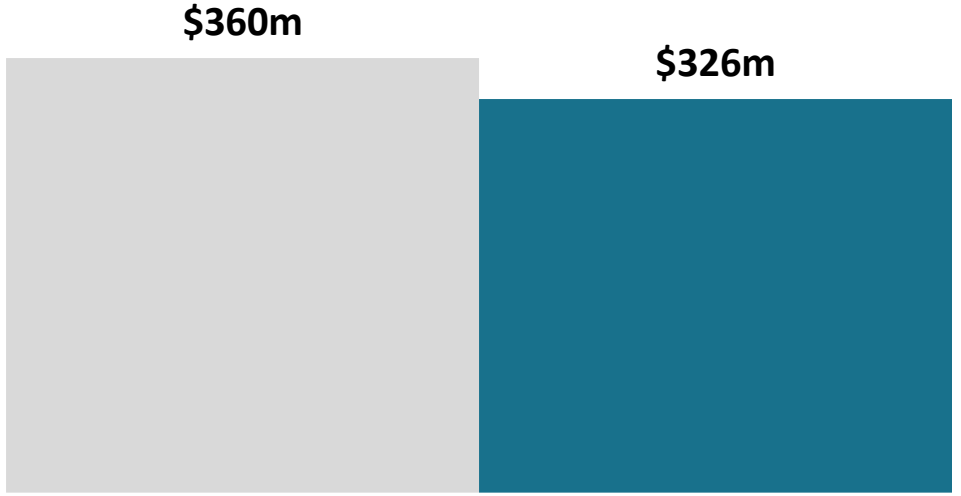
DIRECT SPENDING

$234,685,500

- 2.7% from 2022

ECONOMIC IMPACT

$325,743,500



- 9.4% from 2022[1]

Feb-22 Feb-23

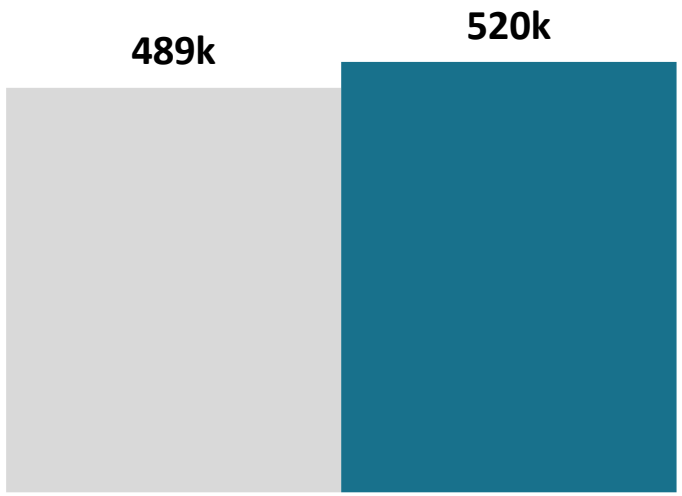
[1] The IMPLAN multiplier for Collier County is 1.491 for 2022 and 1.388 in 2023.

CUMULATIVE VISITATION METRICS

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

CYTD VISITORS

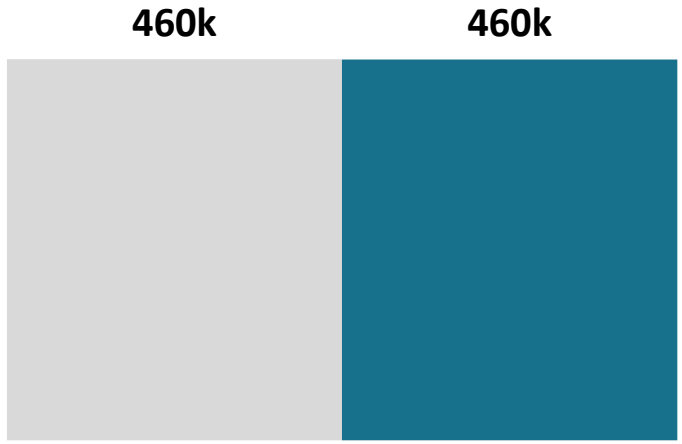
519,900



+ 6.4% from 2022

CYTD ROOM NIGHTS

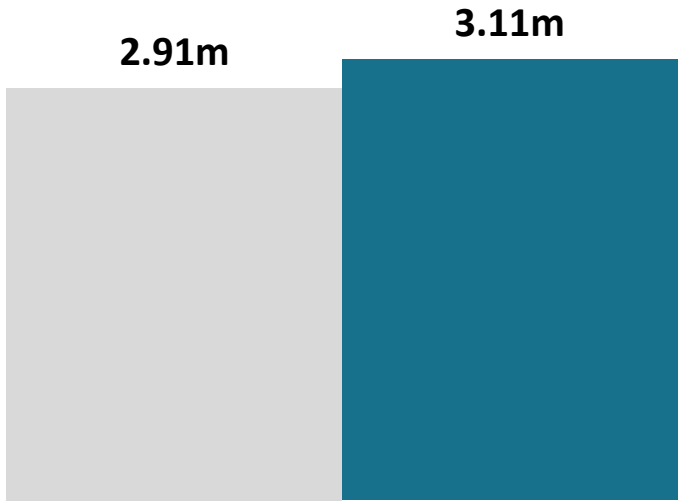
460,000



- 0.1% from 2022

CYTD VISITOR DAYS

3,105,600



+ 6.9% from 2022

Feb-22 Feb-23

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CUMULATIVE SPENDING & ECONOMIC IMPACT

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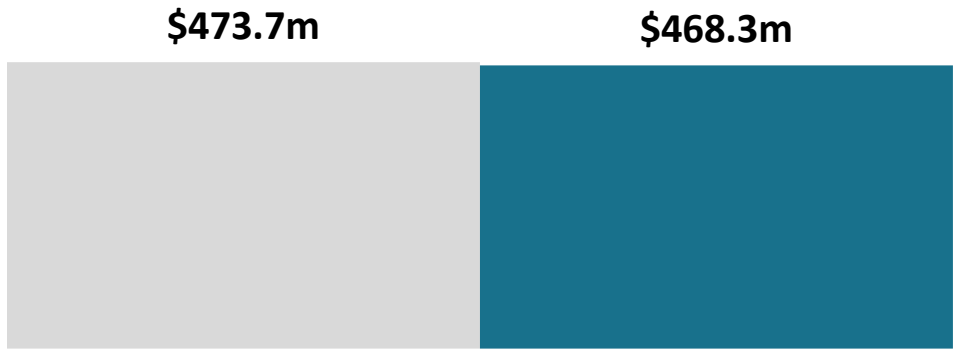
FLORIDA'S PARADISE COAST

CYTD DIRECT SPENDING

$468,309,100

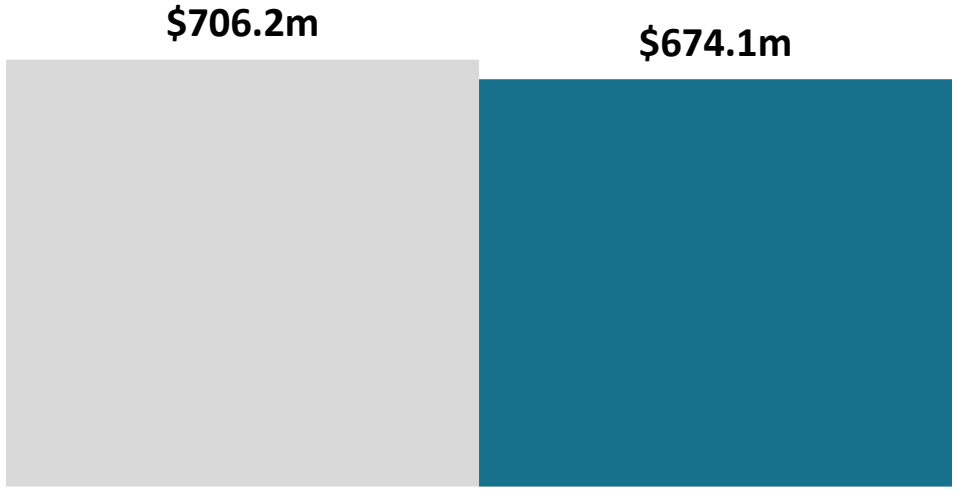
- 1.1% from 2022



CYTD ECONOMIC IMPACT

$674,076,300

- 4.6% from 2022[1]



Feb-22 Feb-23

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

FEBRUARY 2023 OVERALL LODGING METRICS[1]

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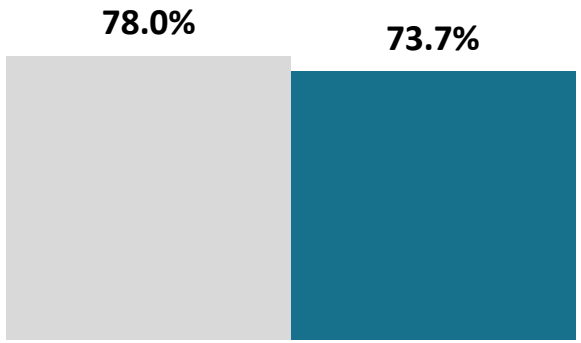
FLORIDA'S PARADISE COAST

OCCUPANCY RATE

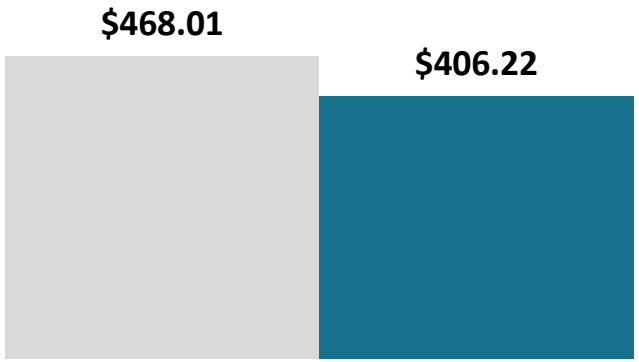
73.7%



- 5.5% from 2022

AVERAGE DAILY RATE

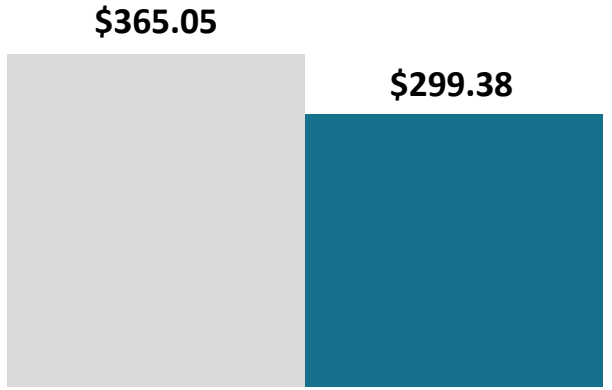
$406.22



- 13.2% from 2022

REVENUE PER AVAILABLE ROOM

$299.38



- 18.0% from 2022

Feb-22 Feb-23

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

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FEBRUARY 2023 HOTEL LODGING METRICS[1]

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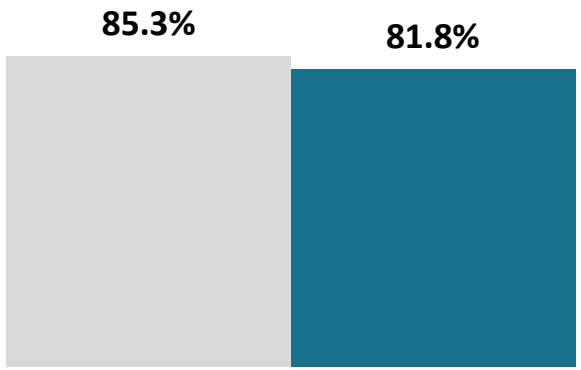
FLORIDA'S PARADISE COAST

OCCUPANCY RATE

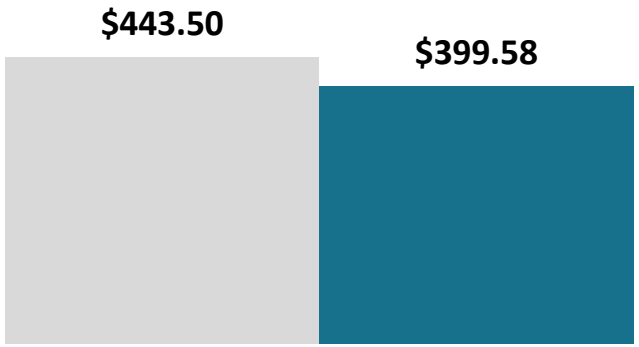
81.8%



- 4.1% from 2022

AVERAGE DAILY RATE

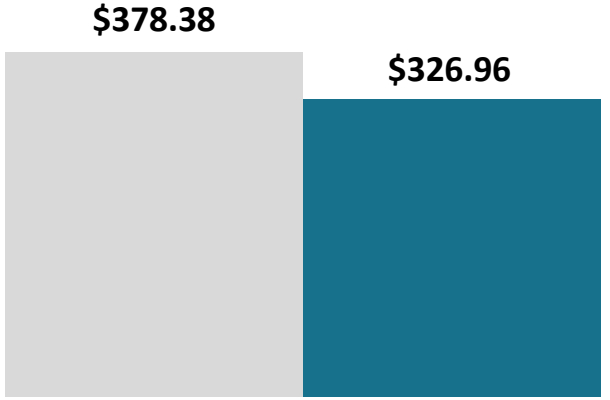
$399.58



- 9.9% from 2022

REVENUE PER AVAILABLE ROOM

$326.96



- 13.6% from 2022

Feb-22 Feb-23

[1] Source: STR Reports

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FEBRUARY 2019-2023 LODGING METRICS[1]

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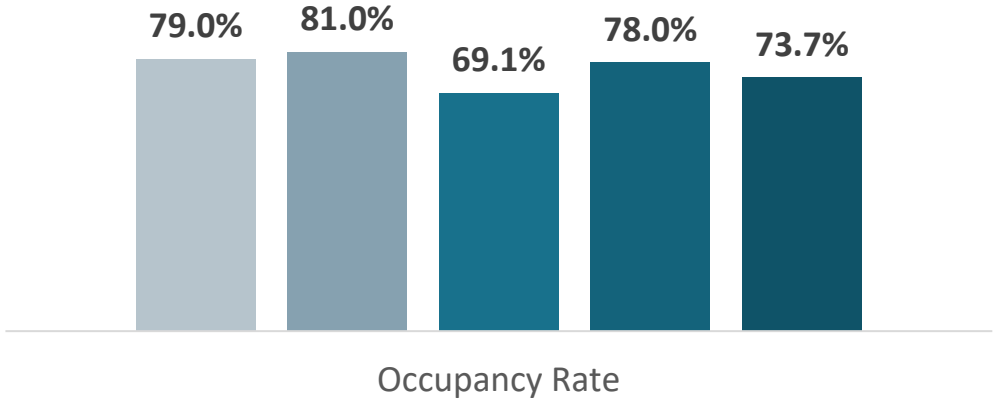
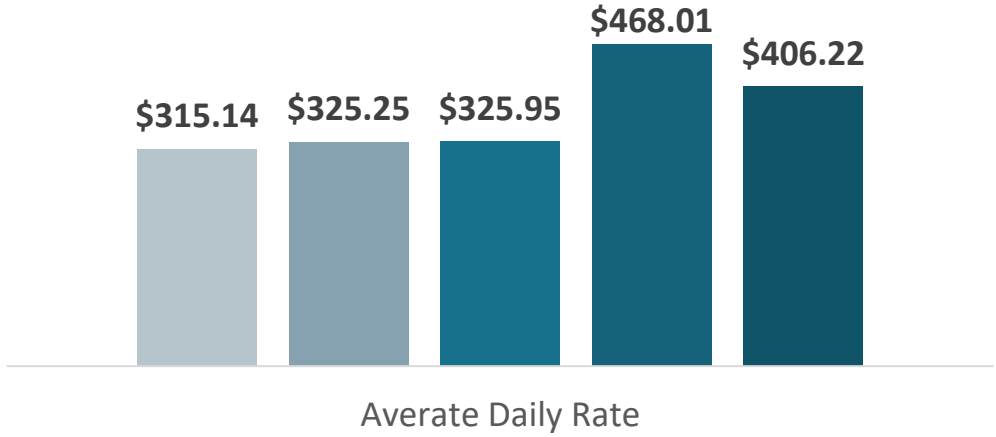
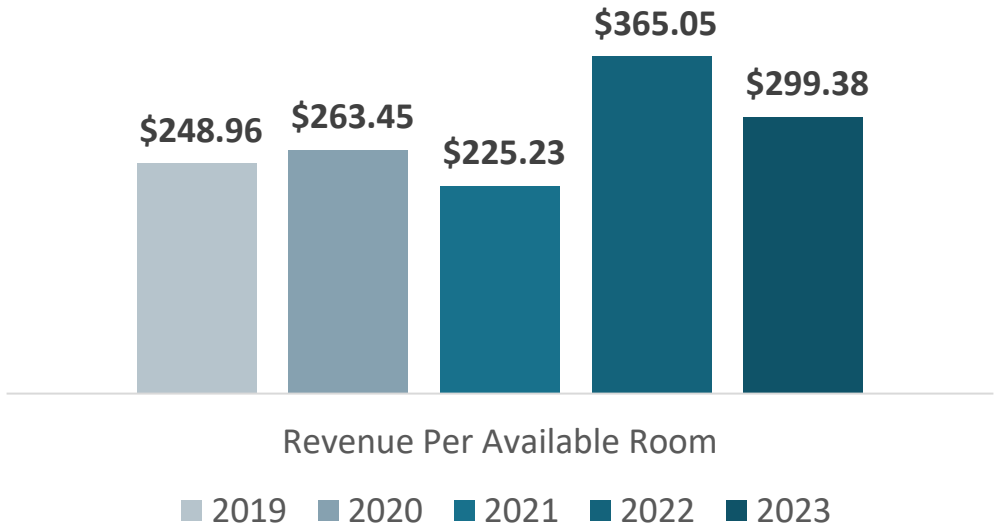
FLORIDA'S PARADISE COAST







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

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OCCUPANCY BAROMETER

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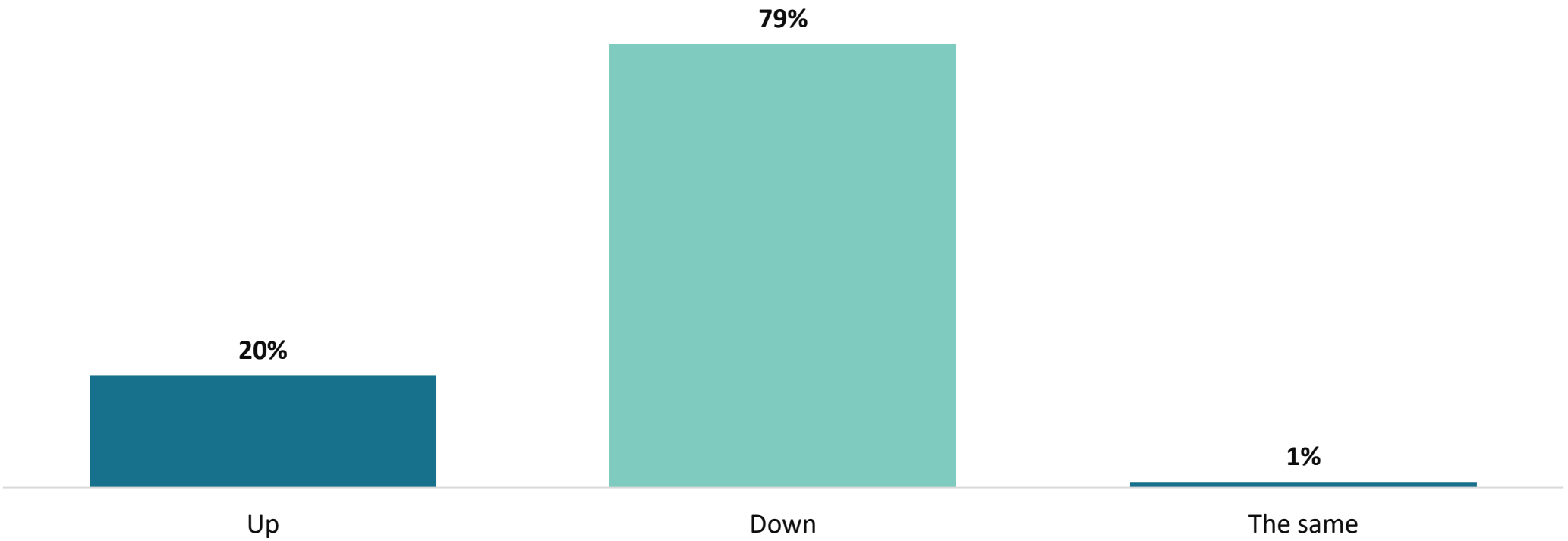
FLORIDA'S PARADISE COAST

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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VISITOR ORIGIN

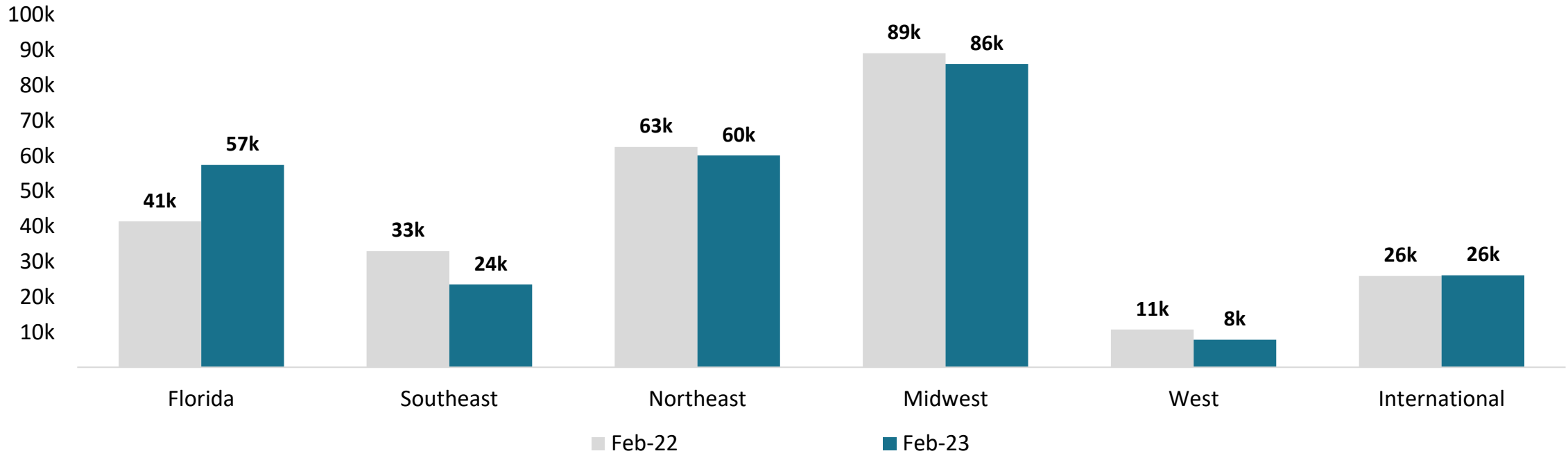
NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

FLORIDA VISITORS

57,400

OUT-OF-STATE VISITORS

203,600



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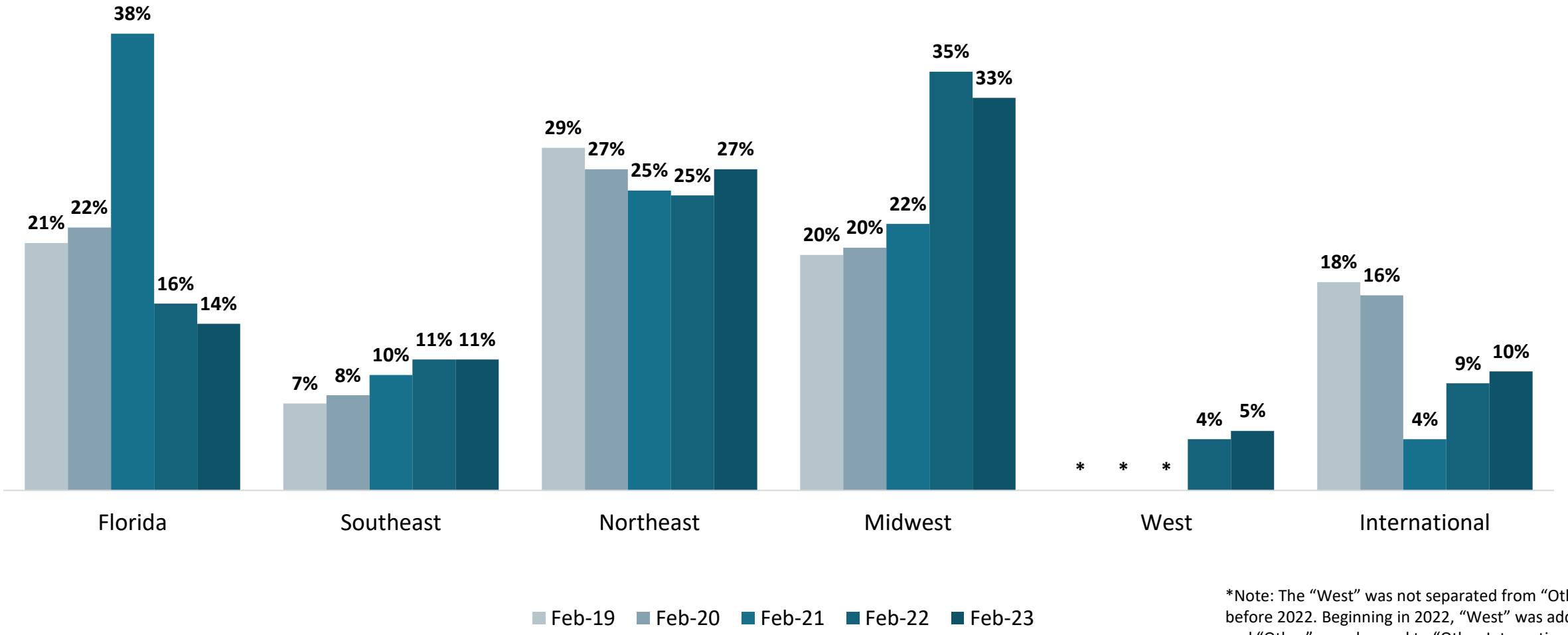
FEBRUARY 2019-2023 OVERNIGHT VISITOR ORIGIN



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

CYTD 2023 VISITOR ORIGIN MARKETS

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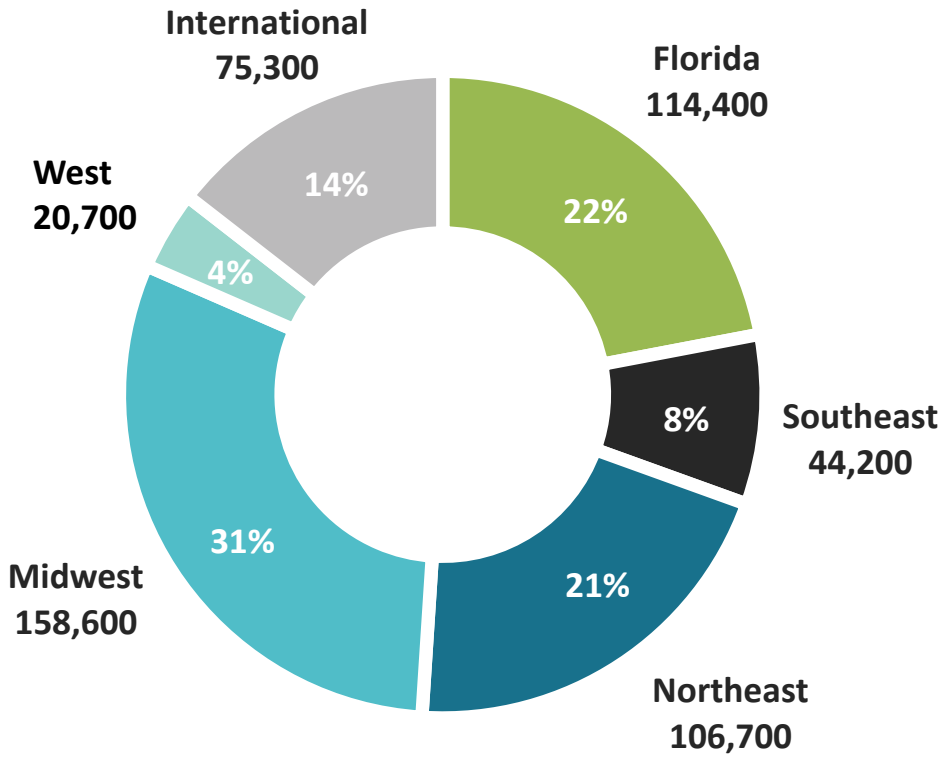
FLORIDA'S PARADISE COAST

	CYTD 2022		CYTD 2023		Percent Change (Δ%)	
Region	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	79,800	16.3%	114,400	22.0%	+ 43.4%	+ 34.7%
Southeast	60,100	12.3%	44,200	8.5%	- 26.5%	- 30.9%
Northeast	116,700	23.9%	106,700	20.5%	- 8.6%	- 14.1%
Midwest	152,400	31.2%	158,600	30.5%	+ 4.1%	- 2.2%
West	26,500	5.4%	20,700	4.0%	- 21.9%	- 26.6%
Canada	13,200	2.7%	31,200	6.0%	+ 136.4%	+ 122.1%
Europe	29,900	6.1%	31,100	6.0%	+ 4.0%	- 2.2%
C/S America	4,100	0.8%	7,800	1.5%	+ 90.2%	+ 78.8%
Other	5,900	1.2%	5,200	1.0%	- 11.9%	- 17.2%
Total	488,600	100%	519,900	100%		



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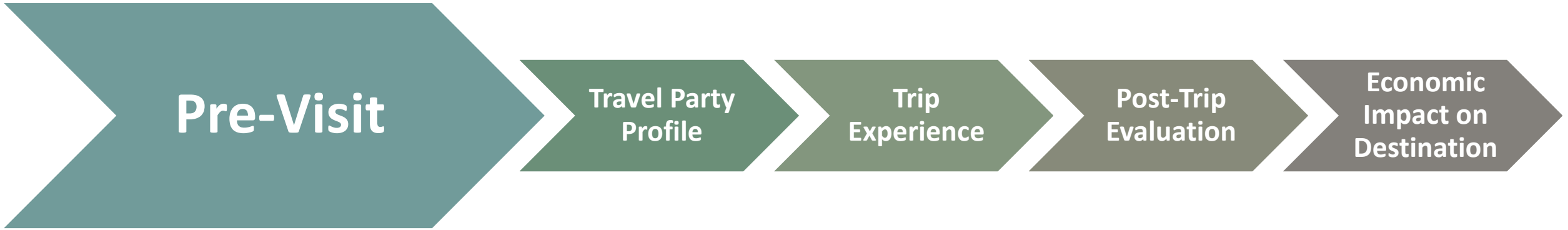
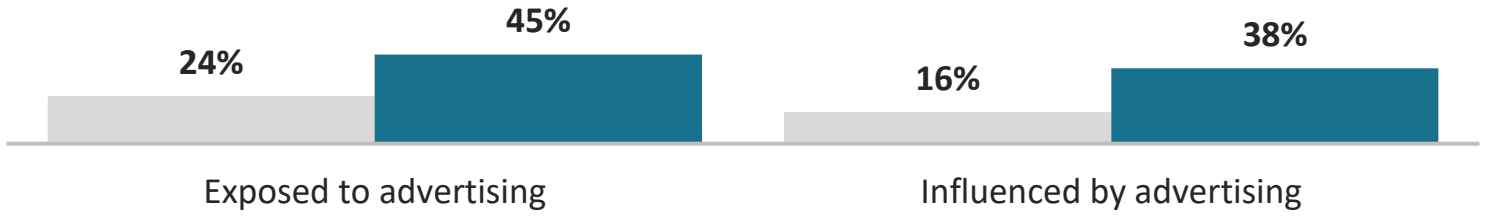
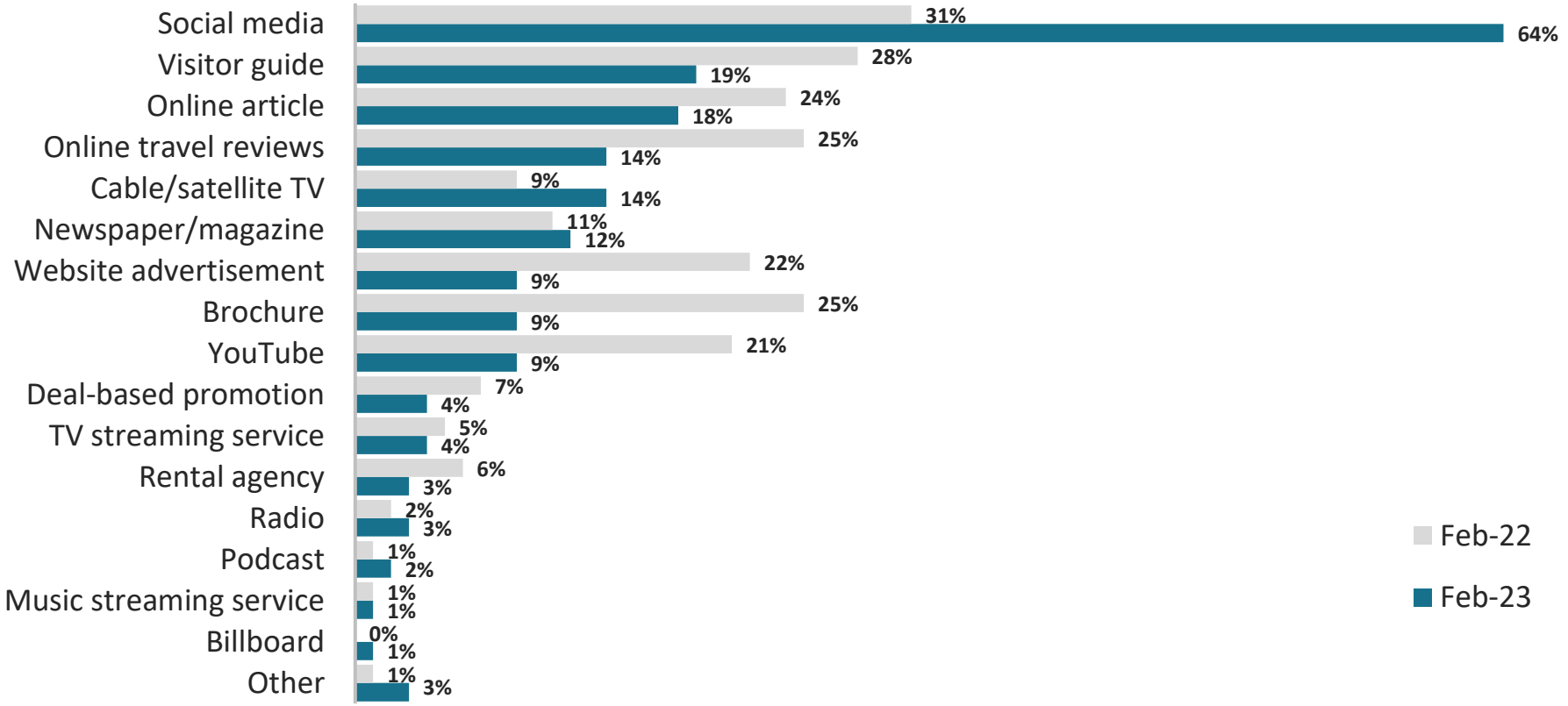
VISITOR JOURNEY: PRE-VISIT



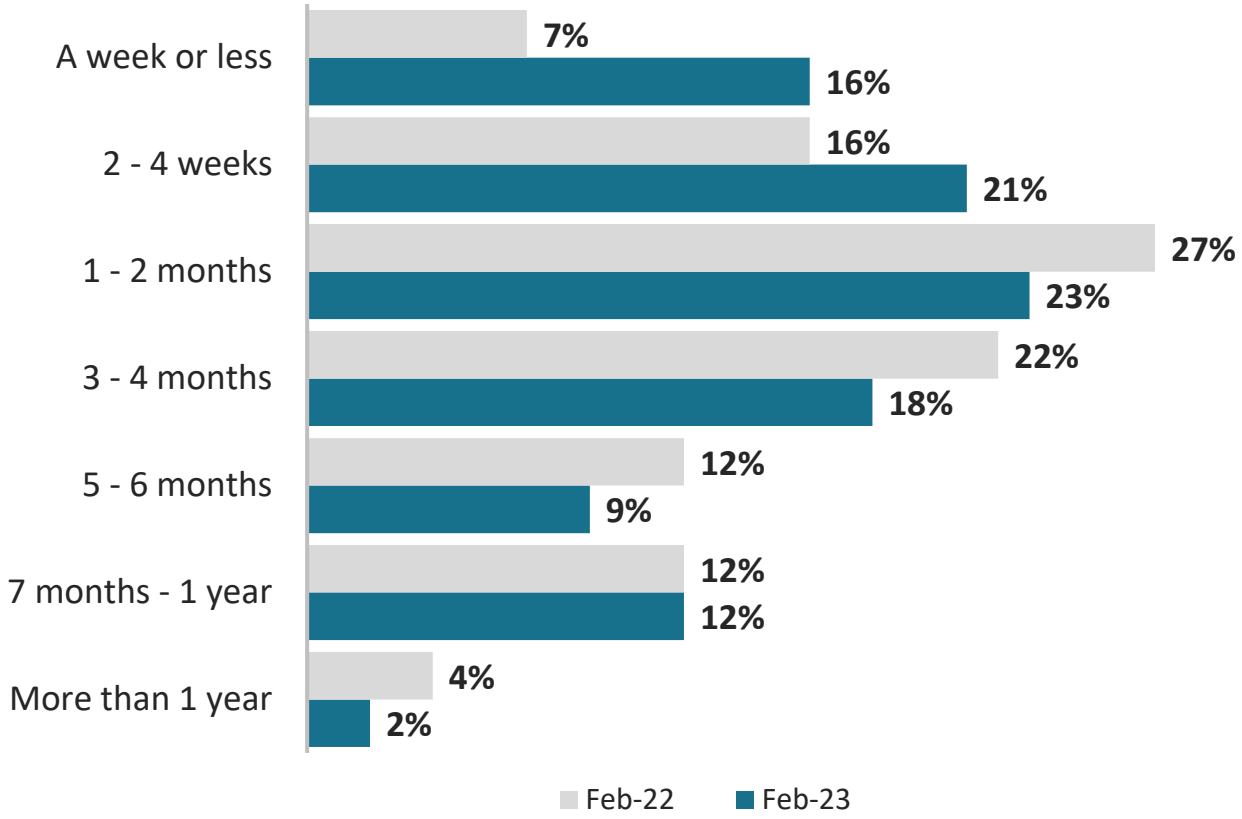
EXPOSURE TO ADVERTISING



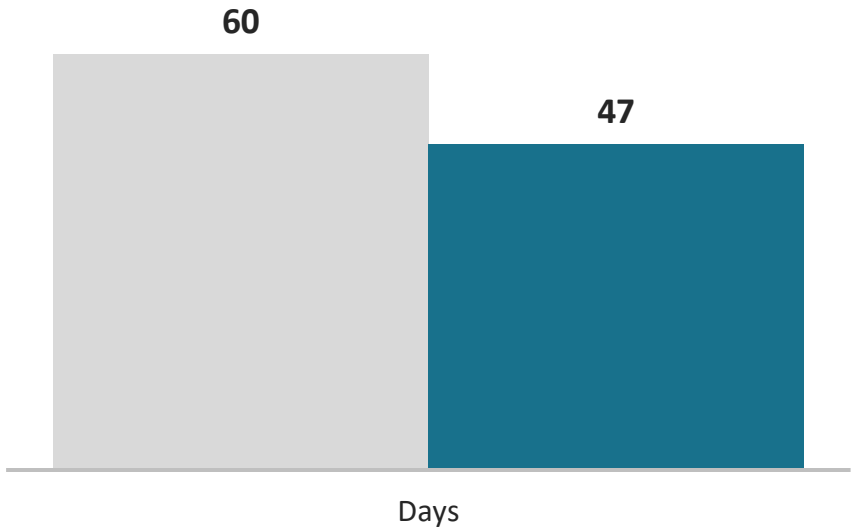
Base: % who saw/read/heard ads



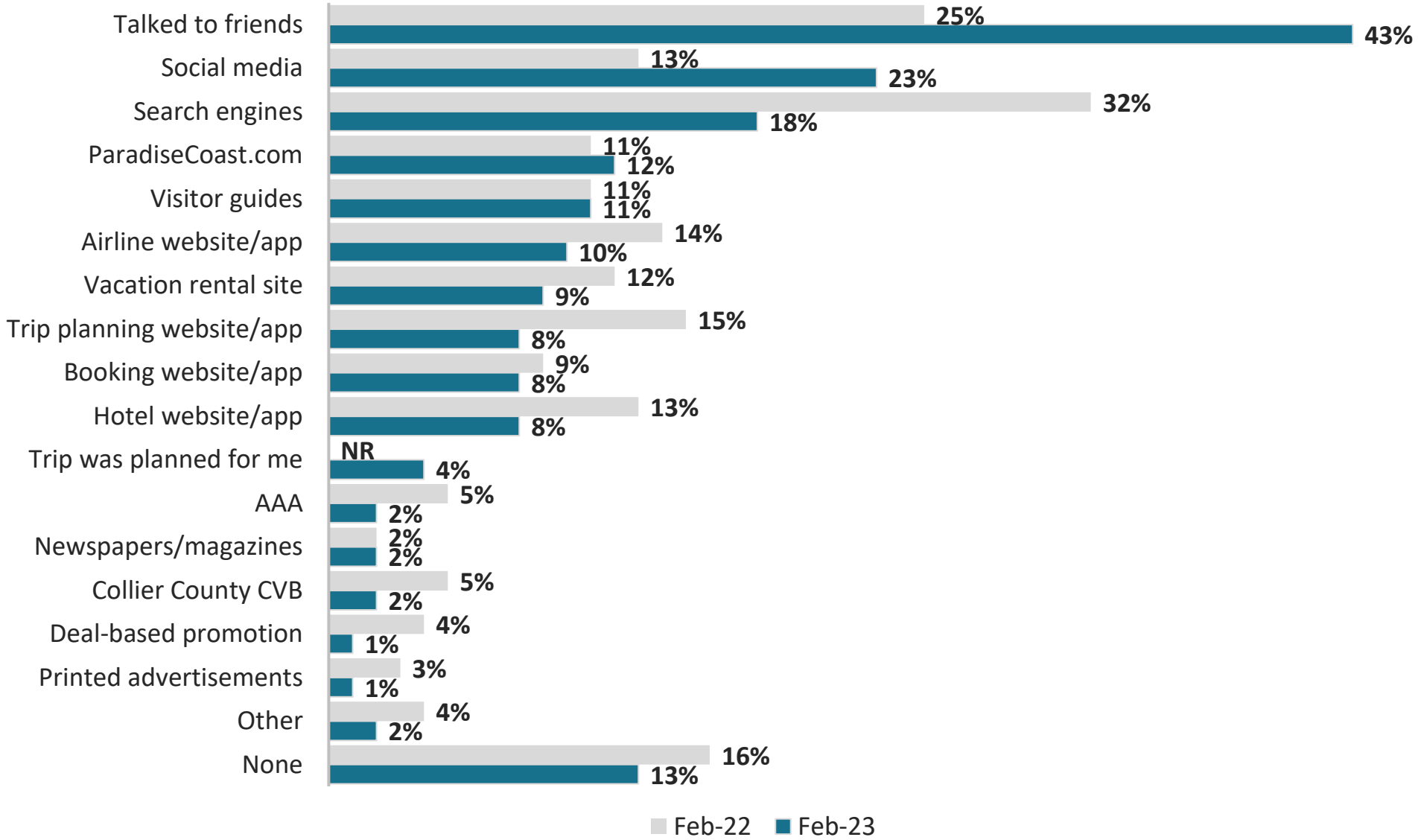
TRIP PLANNING CYCLE



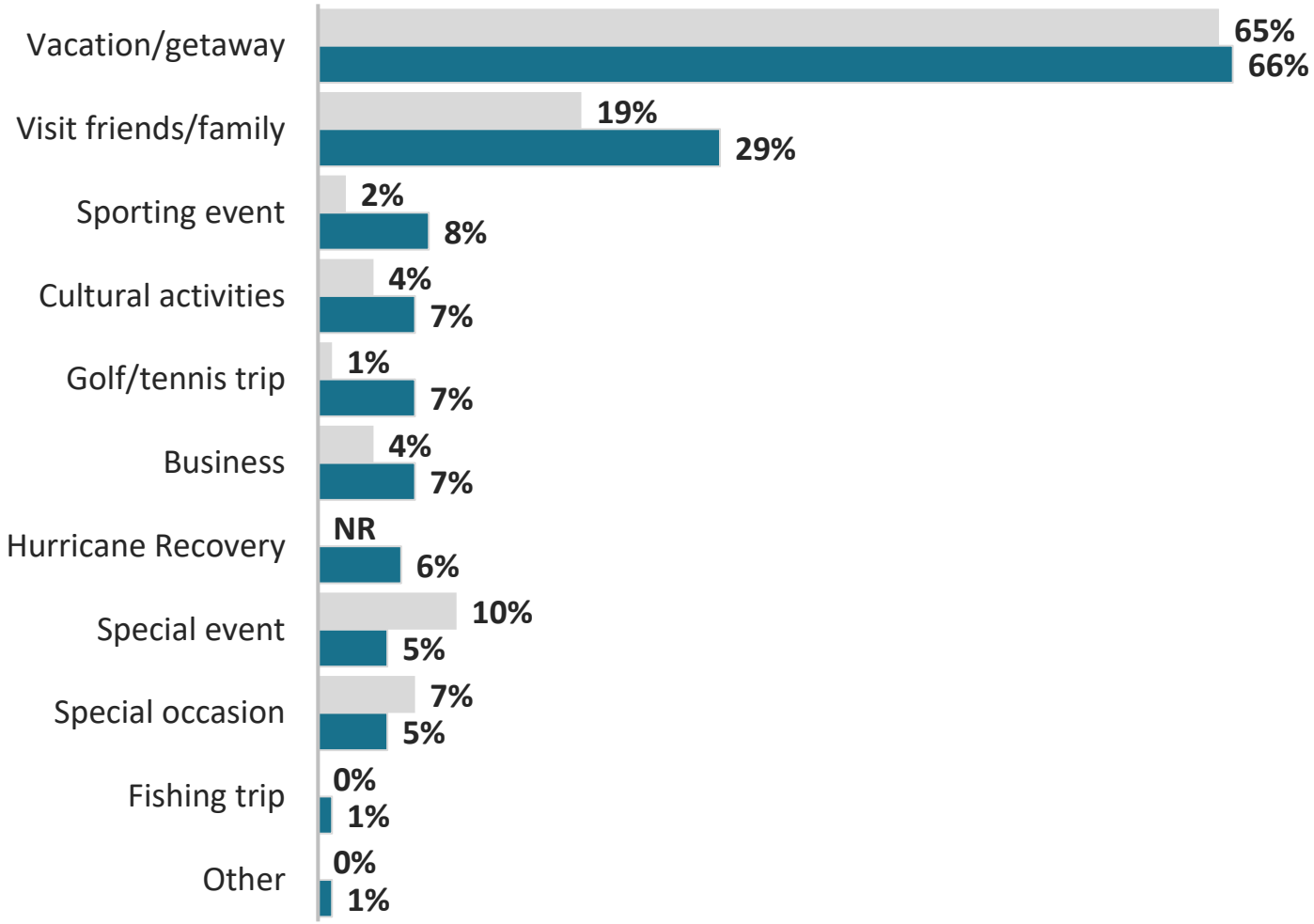
Median Trip Planning Time



TRIP PLANNING SOURCES



REASONS FOR VISITING[1]

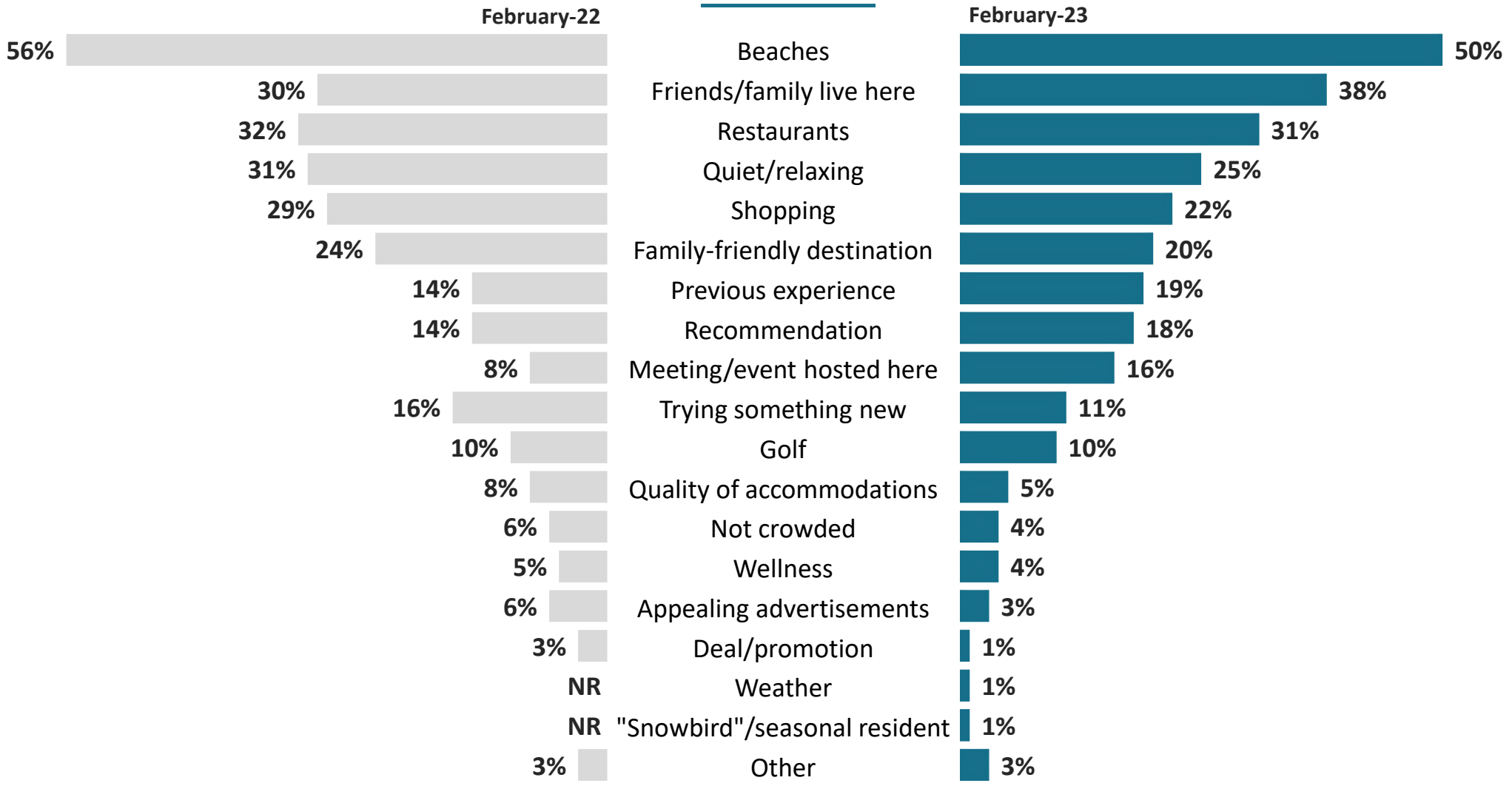


[1] Multiple responses permitted.

REASONS FOR CHOOSING AREA

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

Reasons[1]



[1]Multiple responses permitted.

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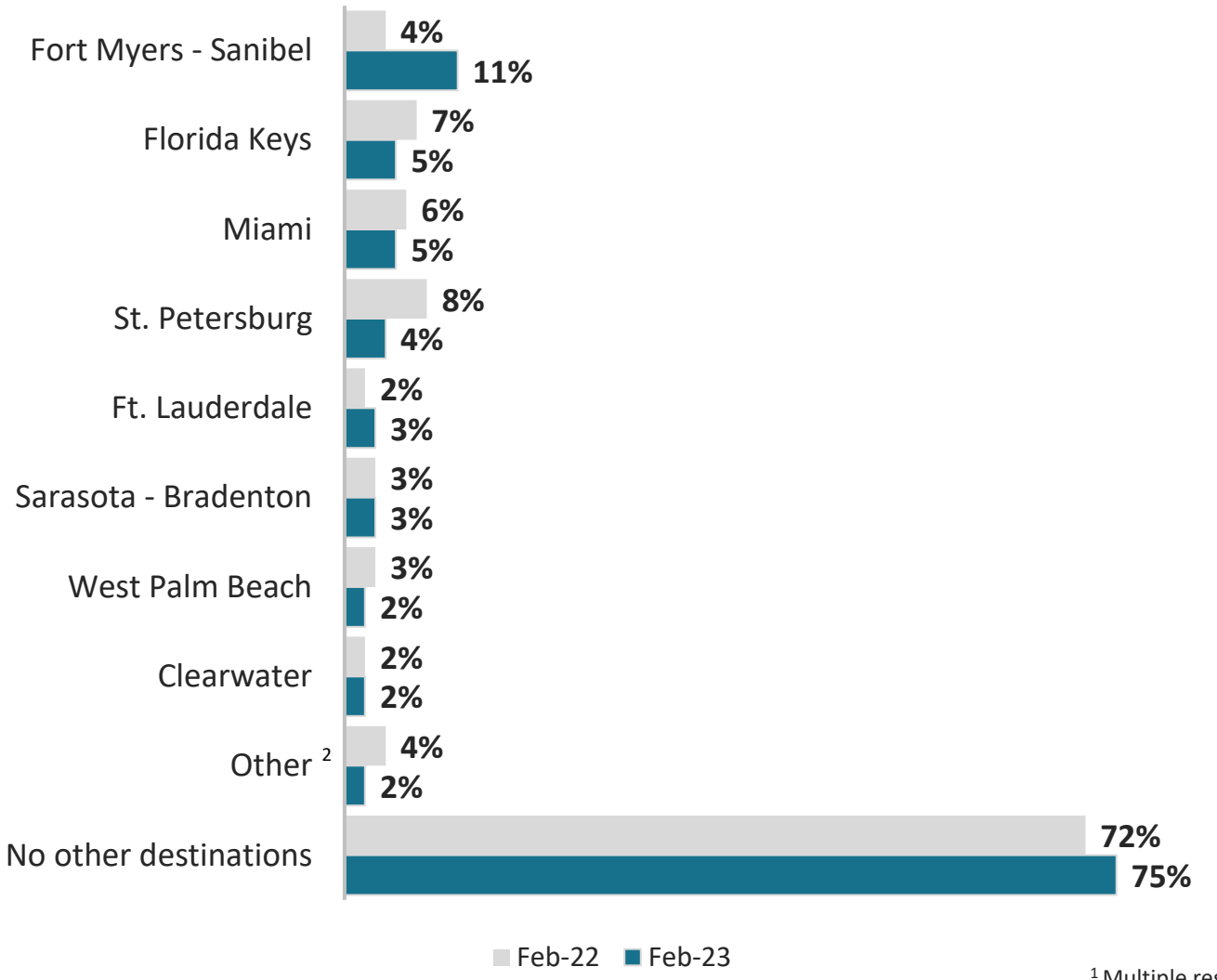
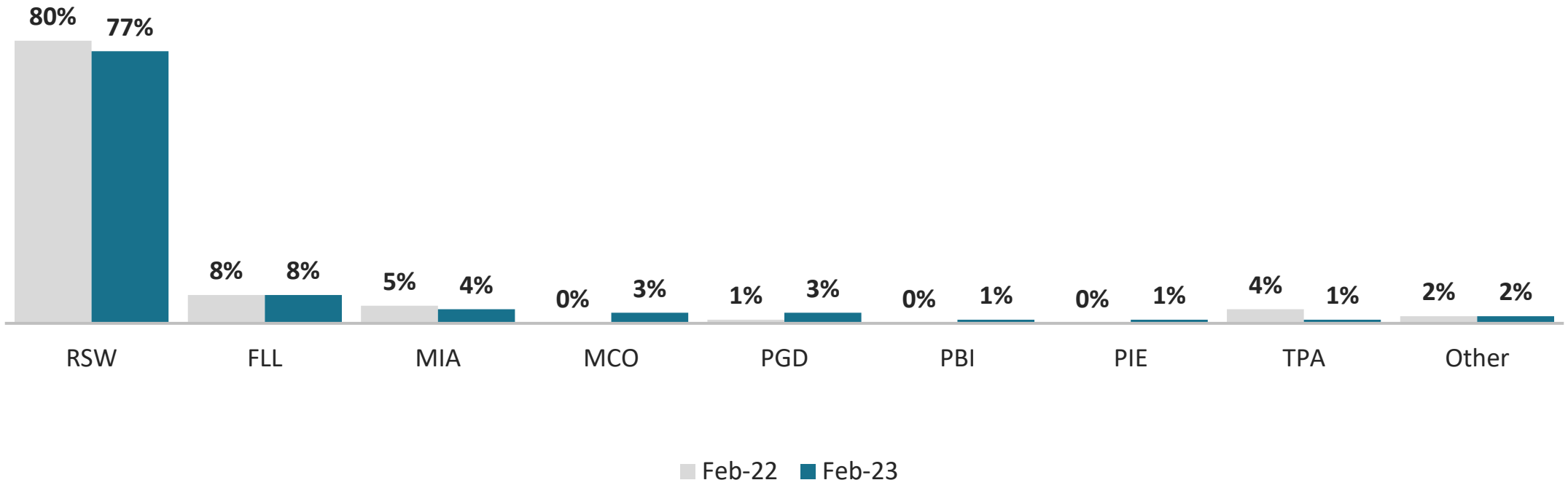
OTHER DESTINATIONS CONSIDERED[1]



[1] Multiple responses permitted.
[2] Other responses included Virginia Beach, Port Charlotte/Venice, Tampa, Orlando, Mexico, and the Caribbean.

TRANSPORTATION METHODS



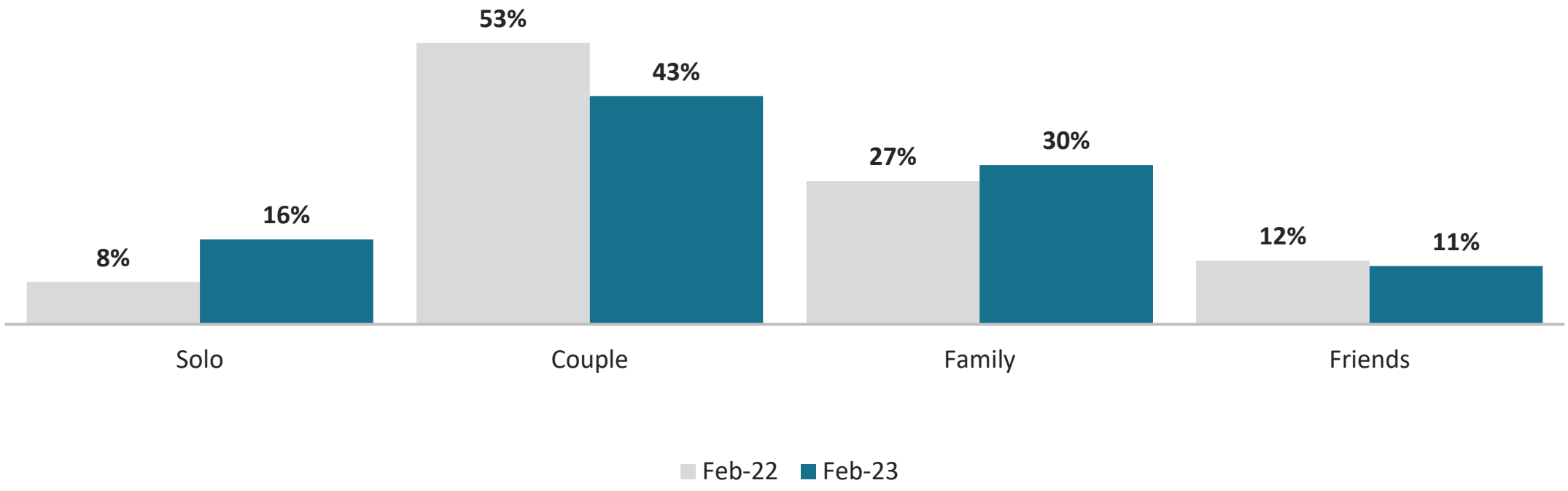
VISITOR JOURNEY: TRAVEL PARTY PROFILE

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

TRAVEL PARTIES

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

TRAVEL PARTY COMPOSITION



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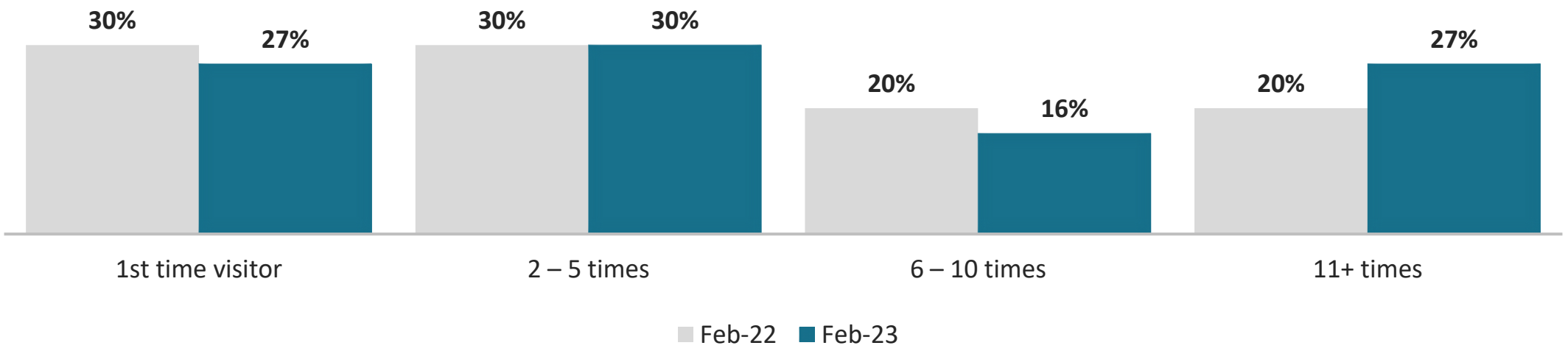
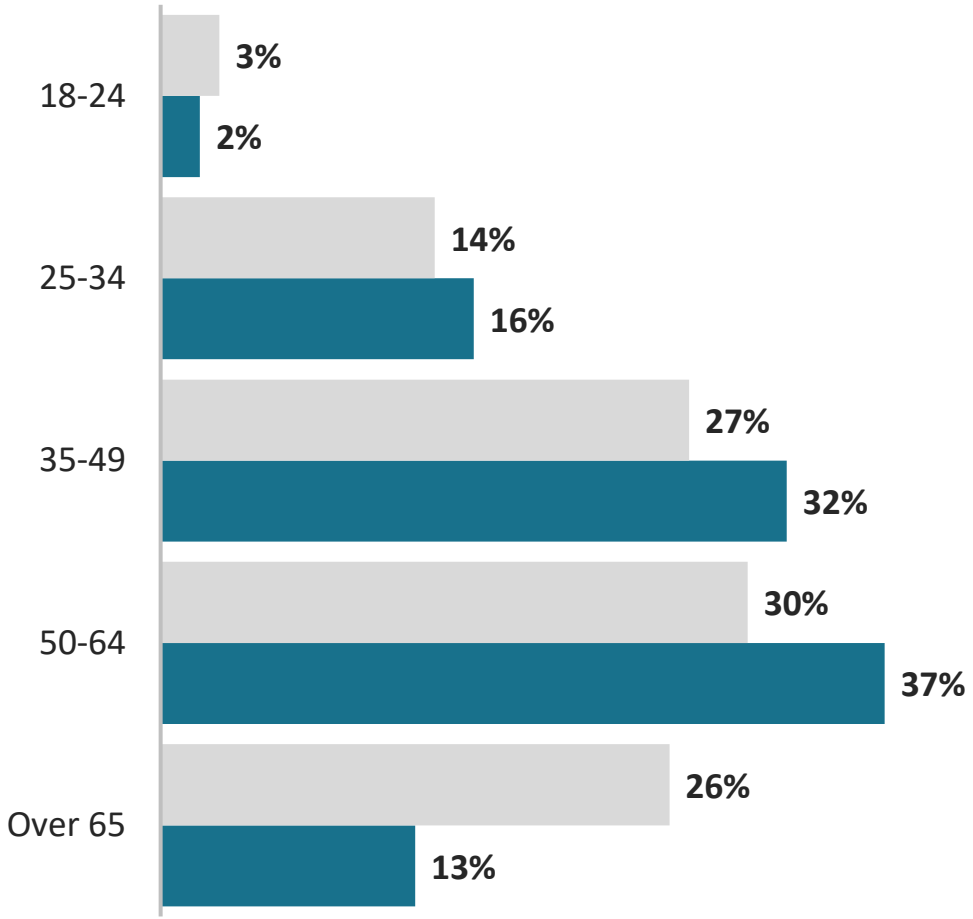
PREVIOUS VISITS



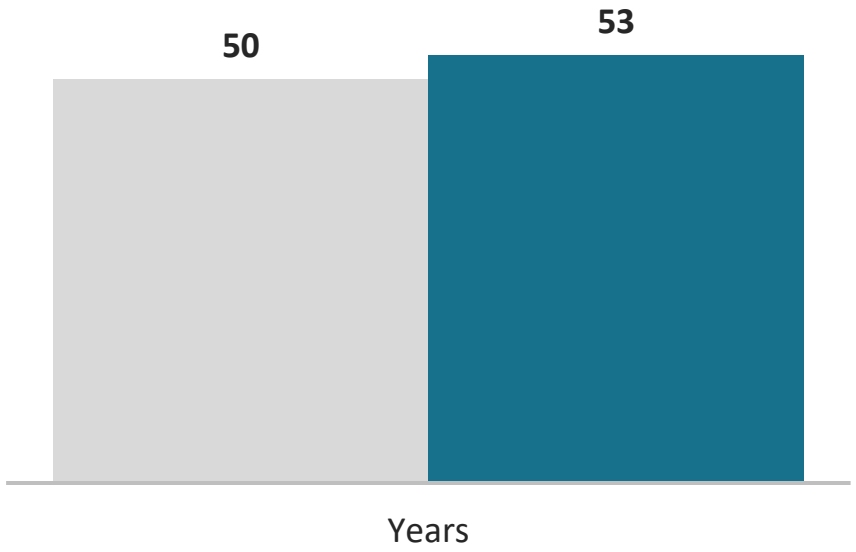
VISITOR AGES

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

Age



Median Age

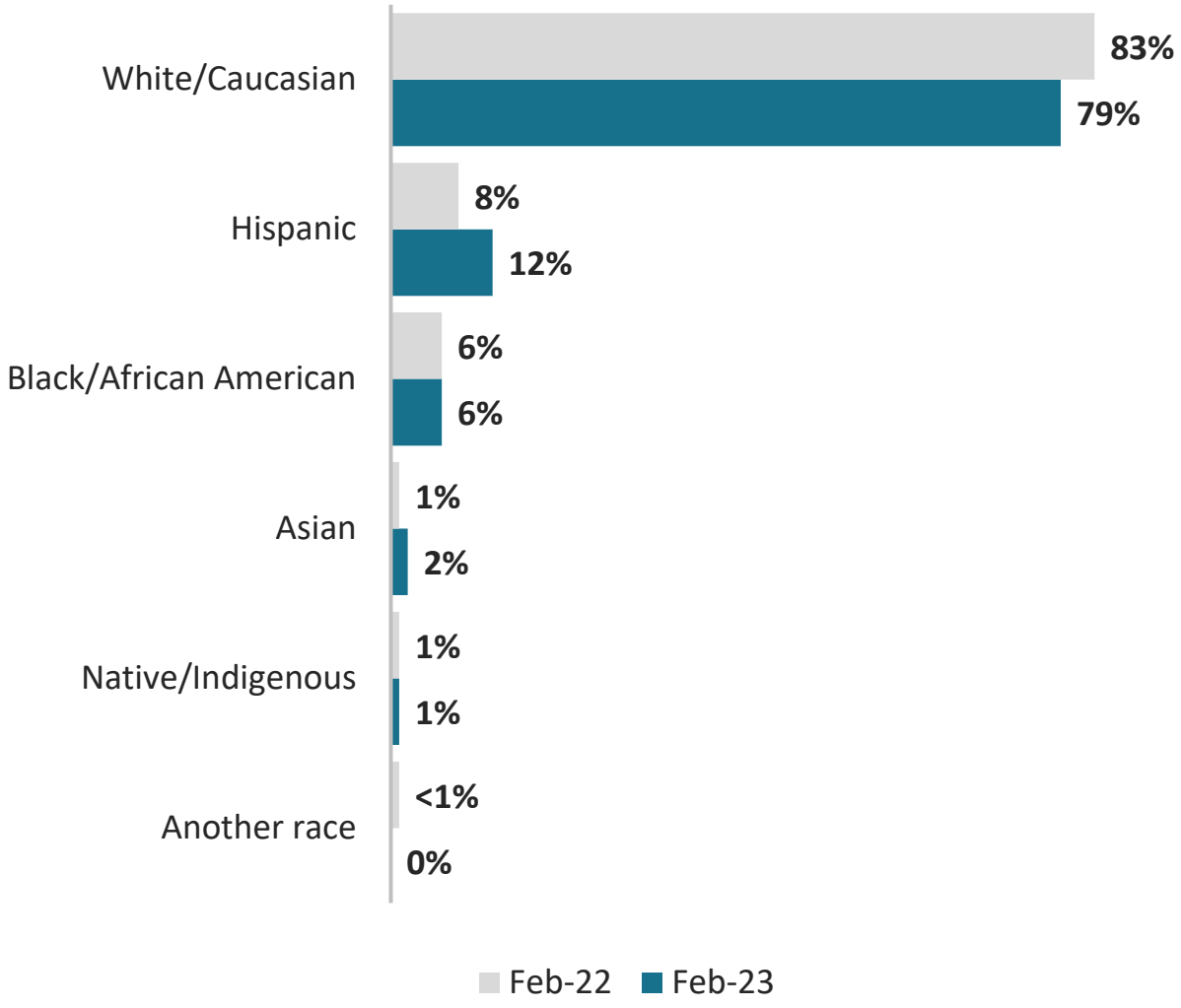


downs & st. germain RESEARCH

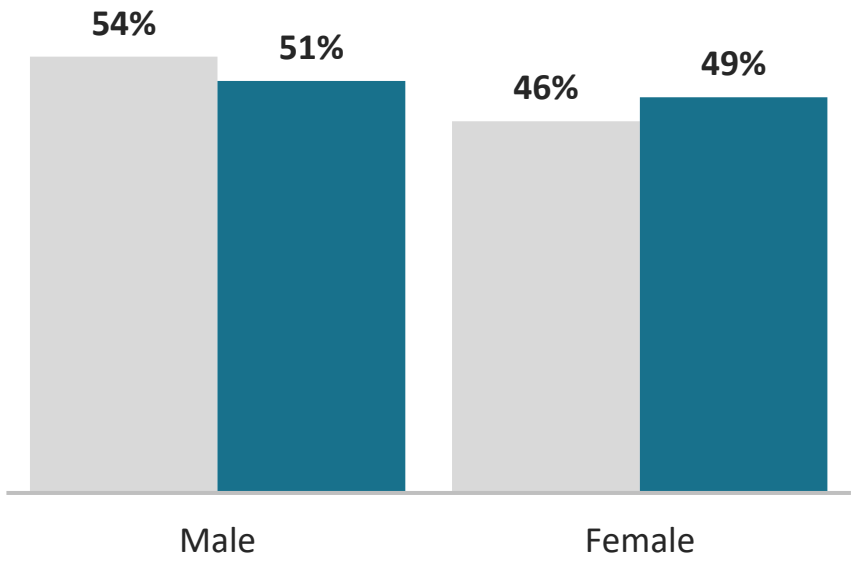
VISITOR RACE & GENDER

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

Race



Gender

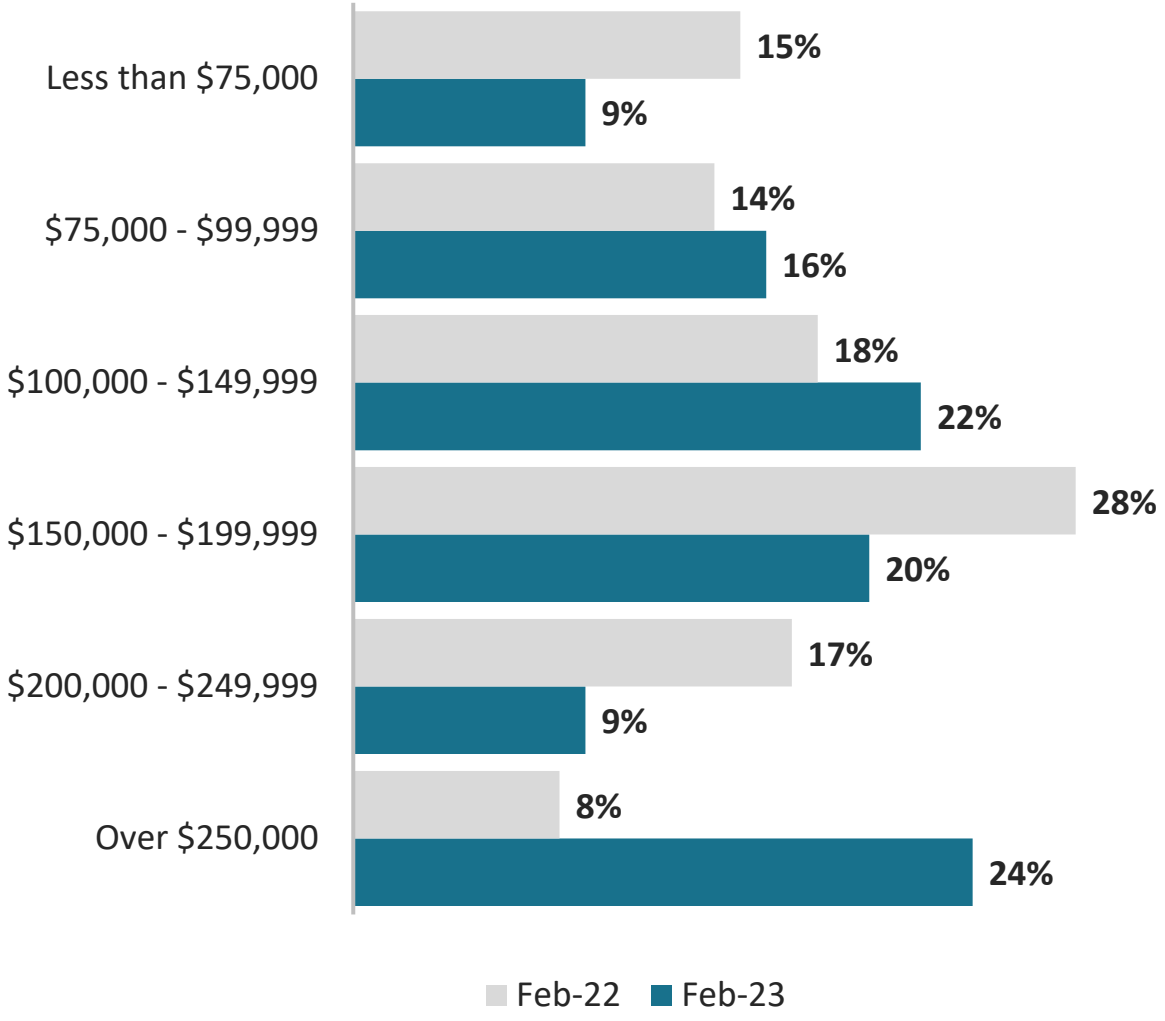


downs & st. germain RESEARCH

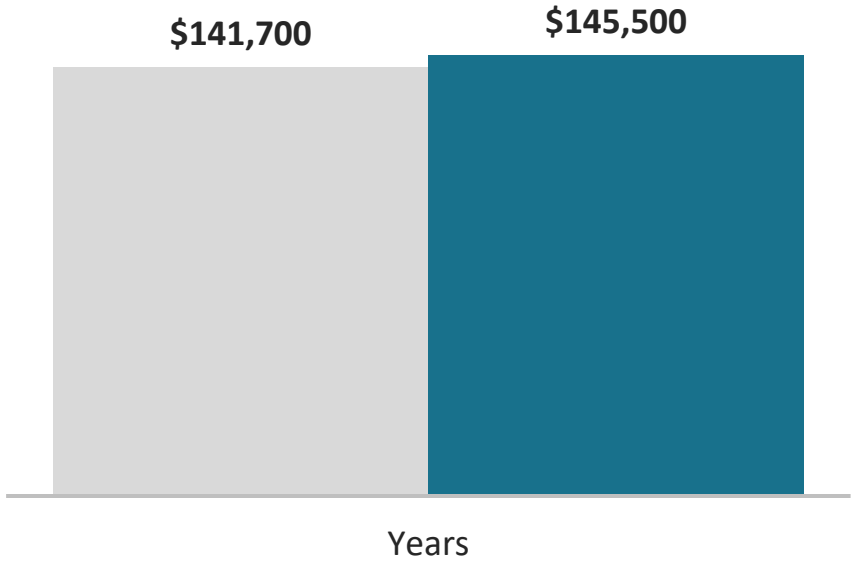
VISITOR INCOME

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

Income



Median Household Income



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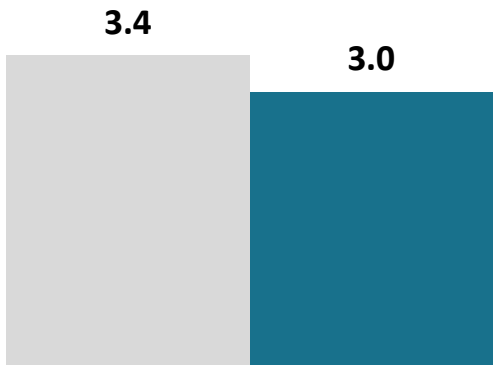
VISITOR JOURNEY: TRIP EXPERIENCE

TRIP CHARACTERISTICS

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

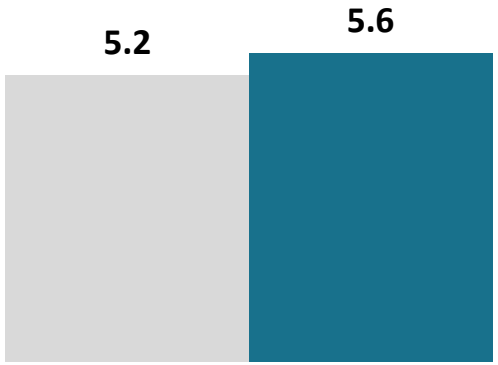
TRAVEL PARTY SIZE

3.0



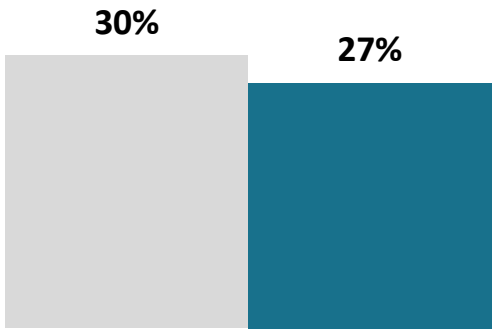
NIGHTS STAYED

5.6



1ST TIME VISITORS

27%



Feb-22 Feb-23

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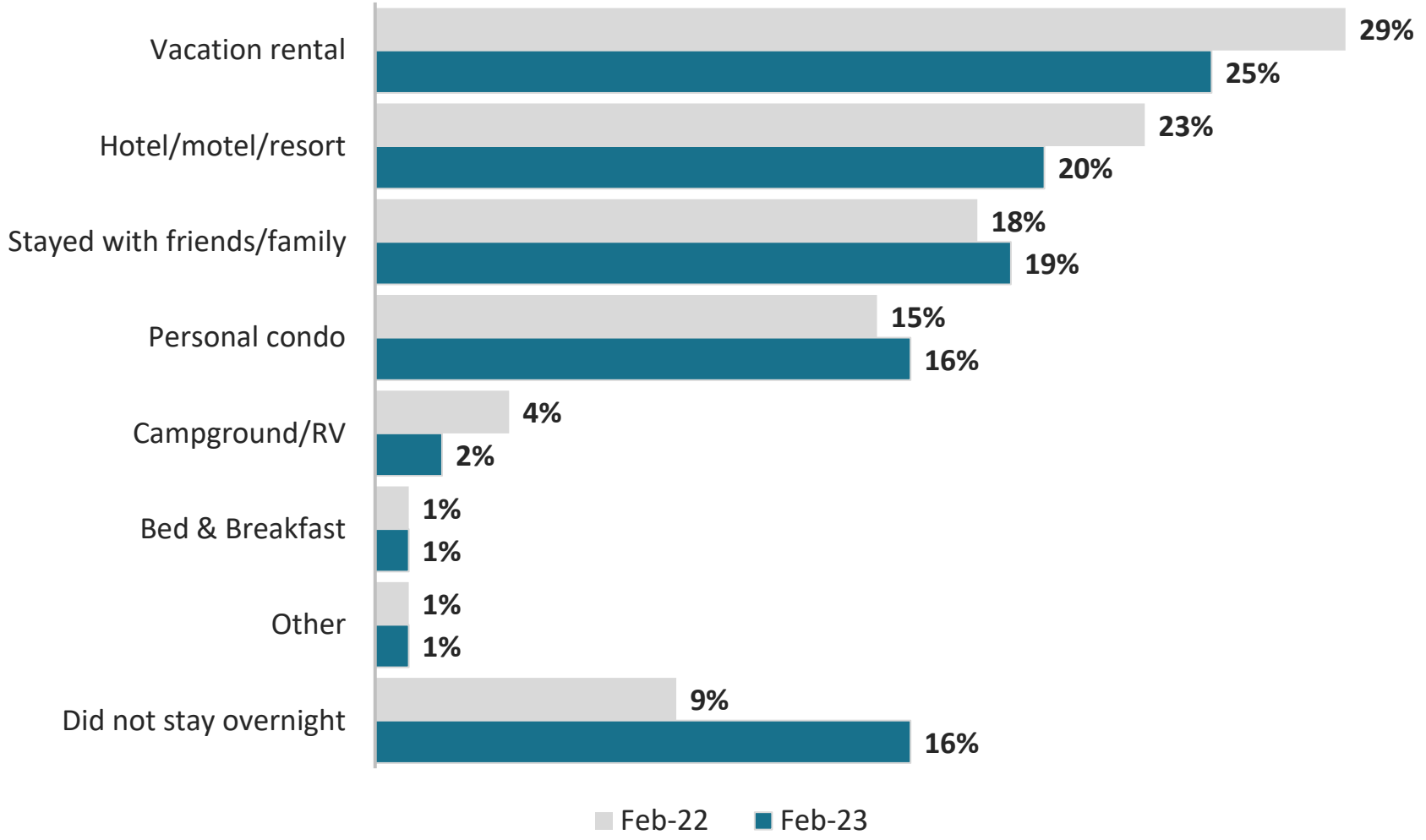
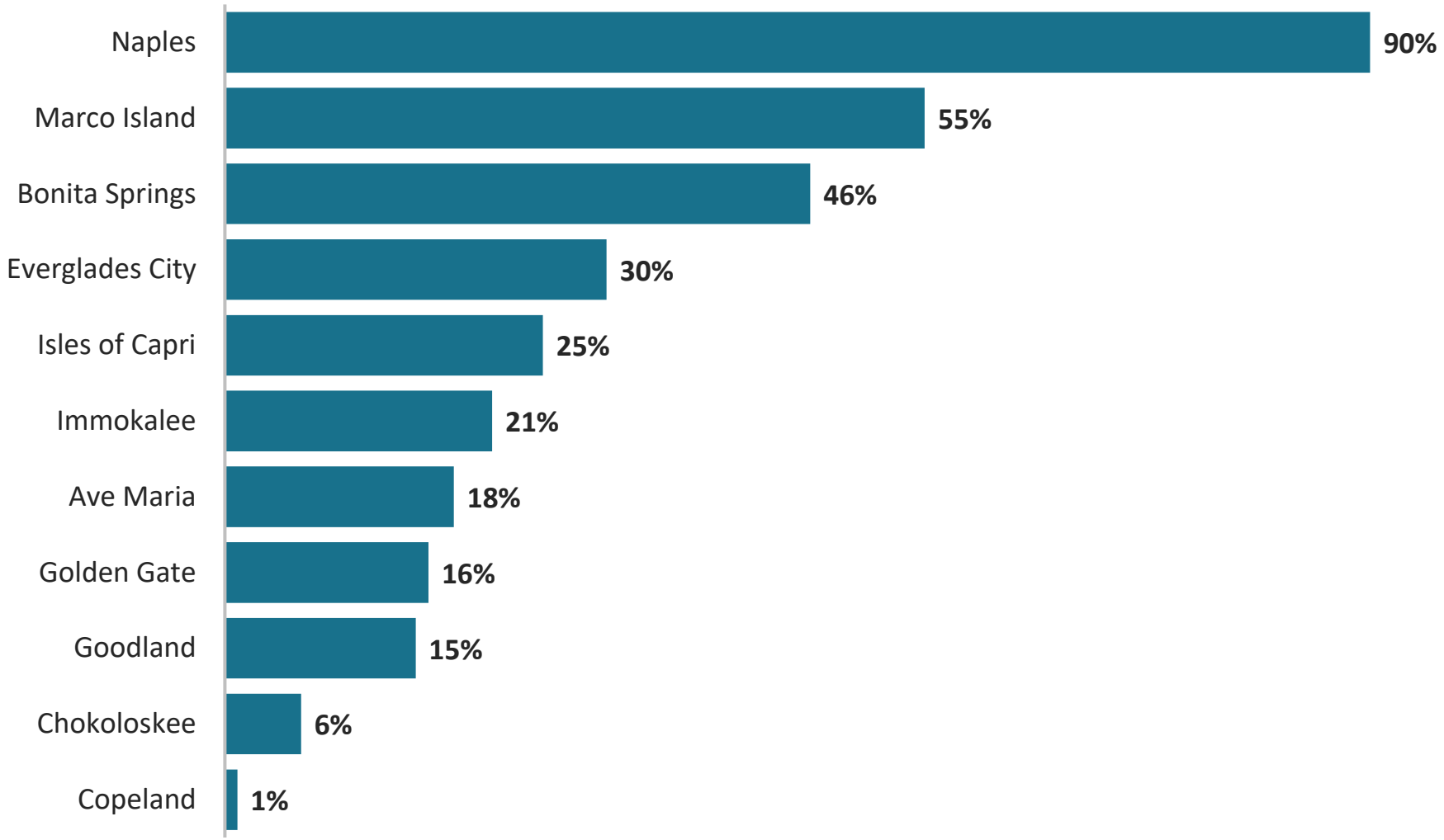
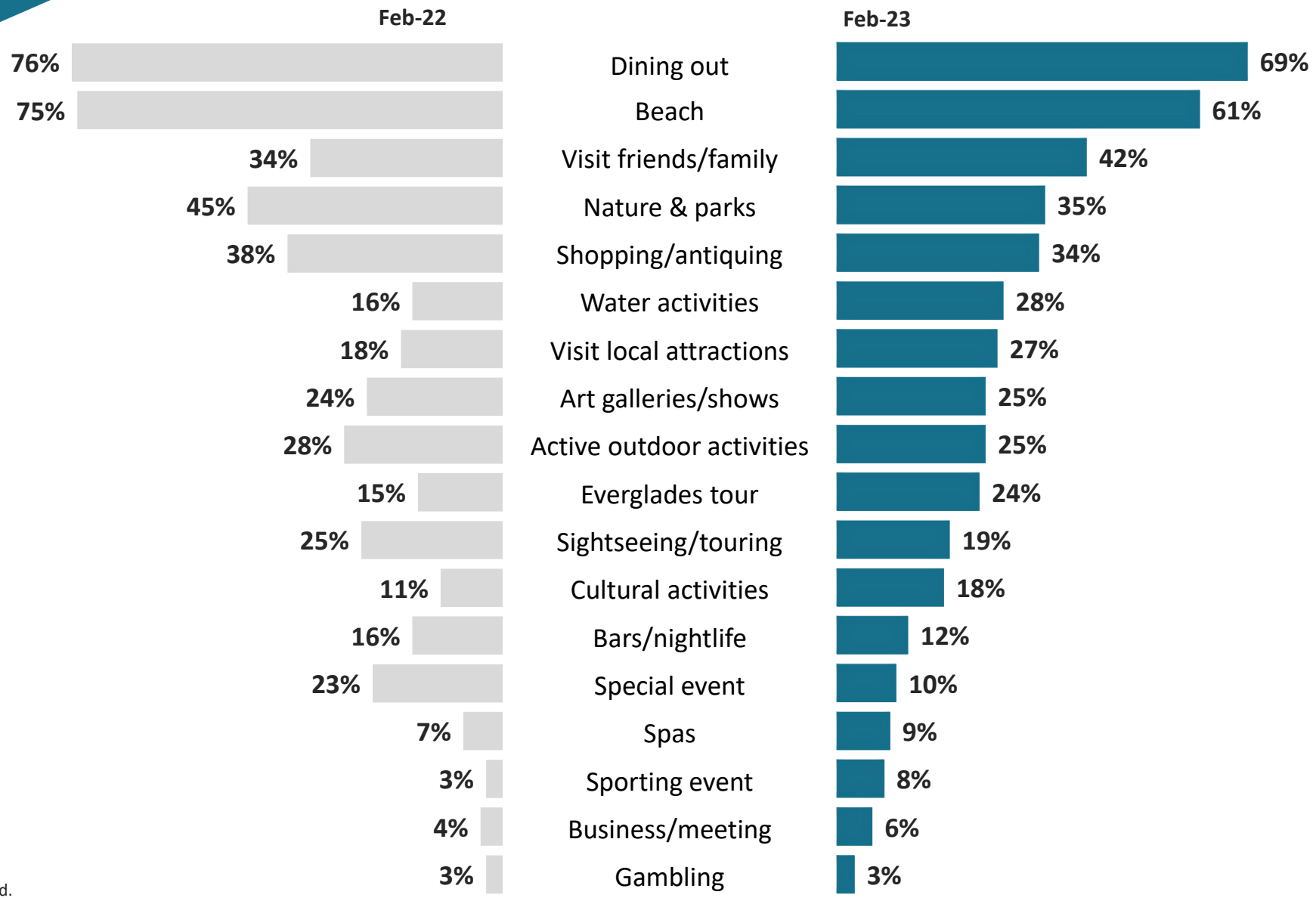
TYPE OF ACCOMODATIONS



AREAS VISITED



TRIP ACTIVITIES



[1] Multiple responses permitted.

VISITOR JOURNEY: POST-TRIP EVALUATION

TRIP EVALUATIONS

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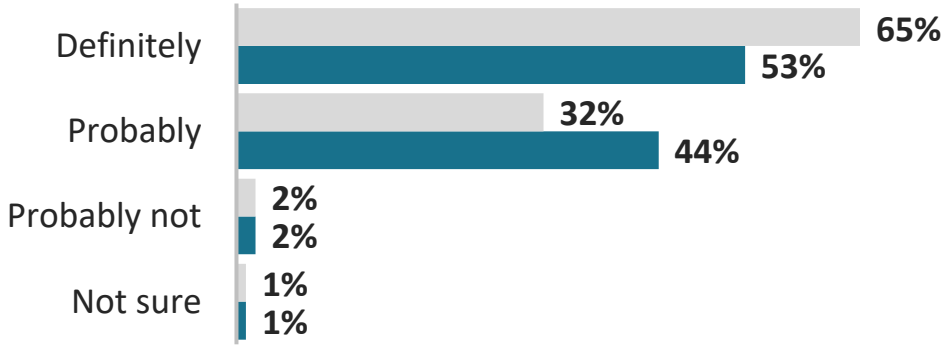
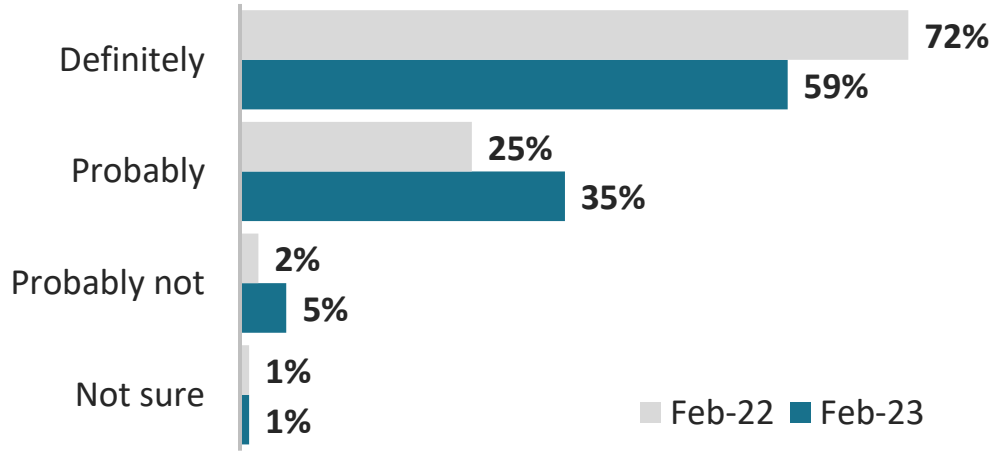
FLORIDA'S PARADISE COAST

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". High cost was the primary reason for visitors providing lower ratings.

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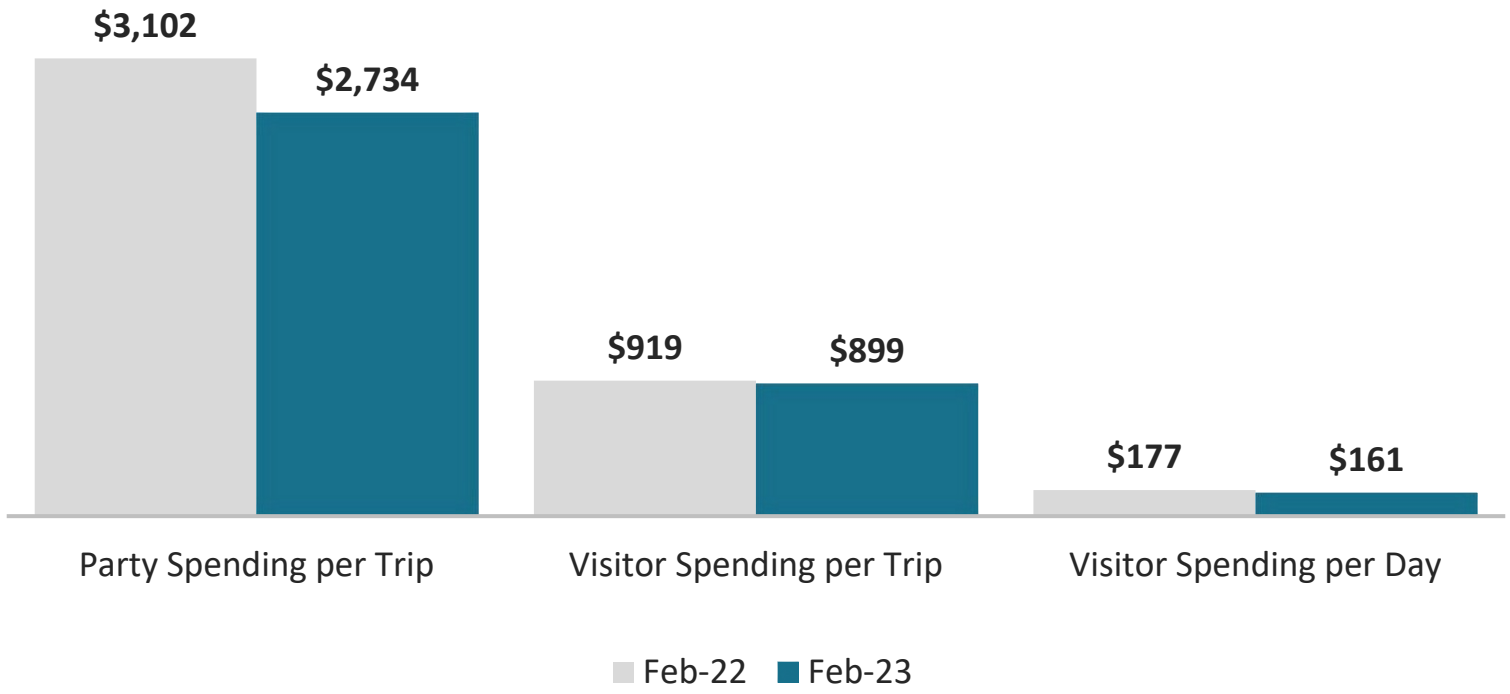
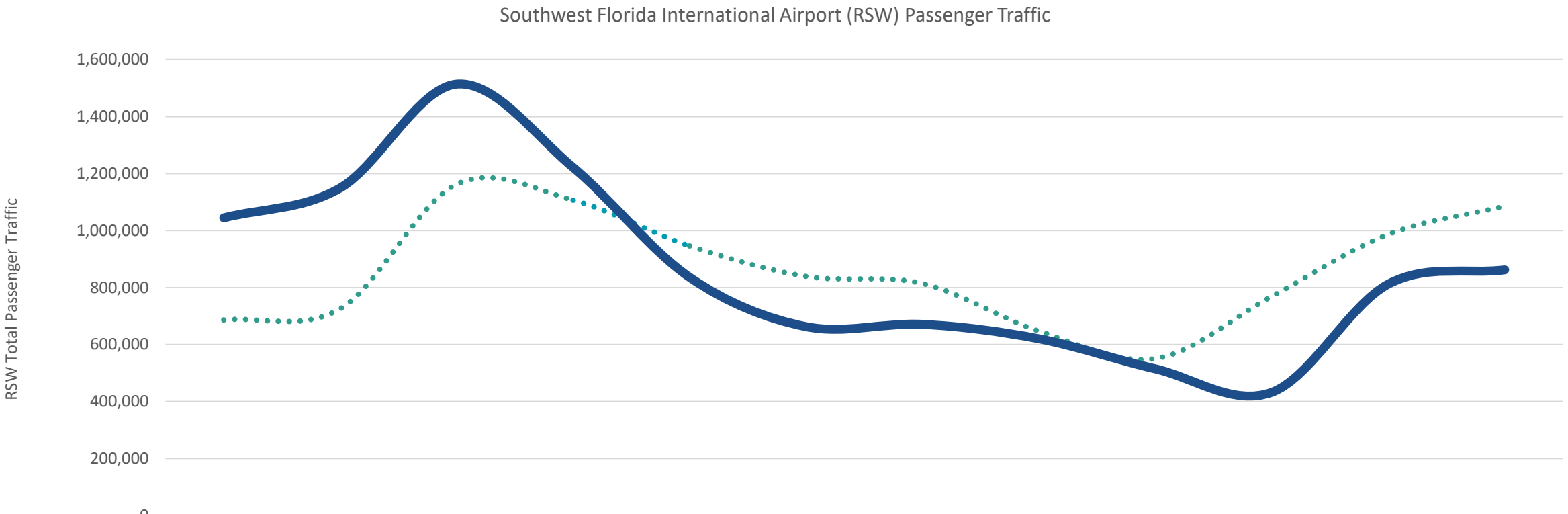
VISITOR SPENDING



INDUSTRY DATA

RSW PASSENGER TRAFFIC



	January	February	March	April	May	June	July	August	September	October	November	December
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	862,368
2023	932,896											

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

LICENSED TRANSIENT RENTAL UNITS

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

February 2023 Licensed Transient Rental Units[1]				
	Hotel	Motel	Vacation Rental	Total
Naples	4,452	1,387	2,295	8,134
Marco Island	1,275	83	1,600	2,958
Immokalee	0	70	104	174
Golden Gate	0	150	0	150
Everglades City	38	36	14	88
Bonita Springs	0	0	56	56
Chokoloskee	0	13	1	14
Goodland	0	0	5	5
Ochopee	0	0	2	2
Ave Maria	0	0	1	1
Total	**5,765**	**1,739**	**4,078**	**11,582[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

February 2023 Monthly Dashboard

Paul Beirnes, Executive Director
paul.beirnes@colliercountyfl.gov

Downs & St. Germain Research
(850) 906-3111 | contact@dsg-research.com