

NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau
January 2022 Monthly Dashboard





Collier County's occupancy rates and average room rates have remained among the highest in Florida, resulting in record-setting RevPAR levels and increases in room nights and total economic impact compared to January 2020



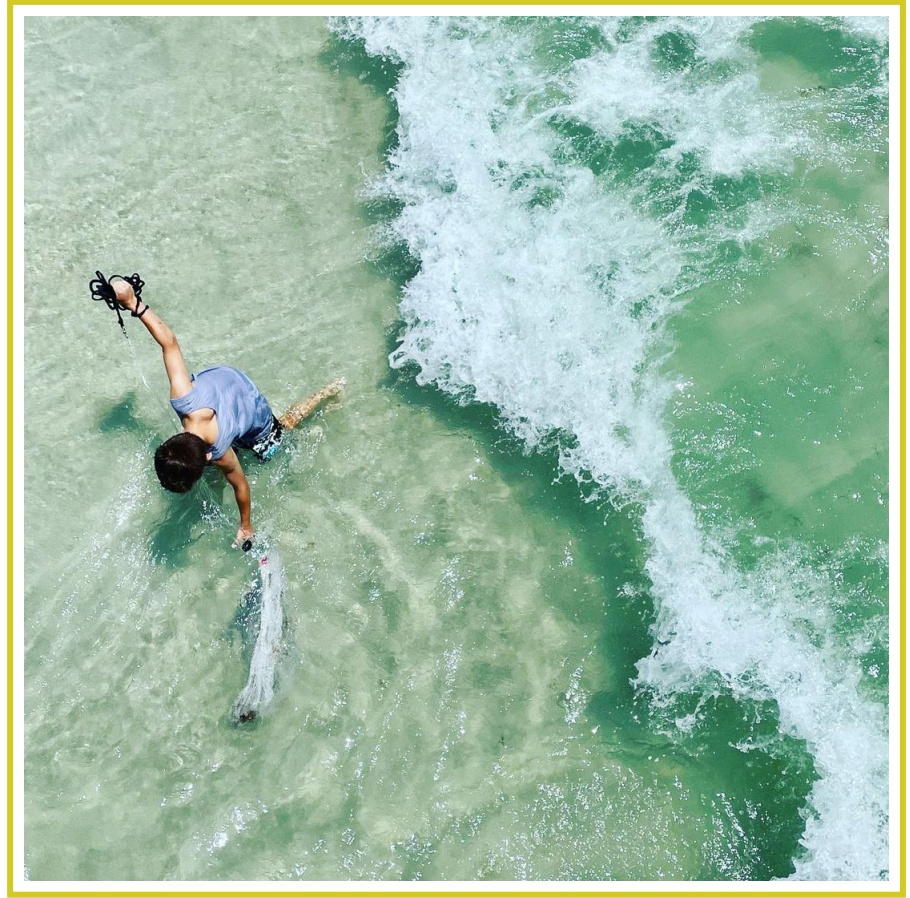
No lodging properties in Collier County reported having fewer bookings in January 2022 than they did in January 2021



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



As restrictions on international travel have been removed, more visitors have traveled to Collier County through Ft. Lauderdale International Airport and Miami International Airport



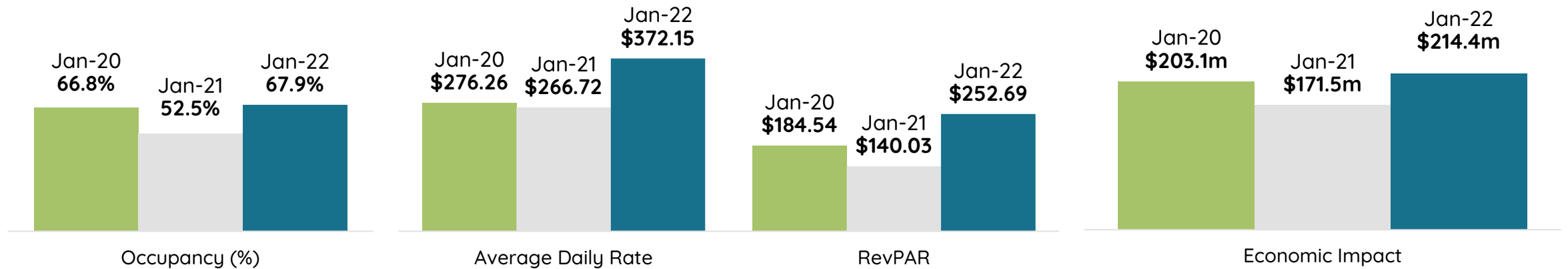
JANUARY 2022 METRICS



JANUARY 2022 OVERNIGHT VISITATION & LODGING*

	January 2020	January 2021	January 2022	% Change from 2020	% Change from 2021
Occupancy Rate	66.8%	52.5%	67.9%	+ 1.6%	+ 29.3%
Average Daily Rate	\$276.26	\$266.72	\$372.15	+ 34.7%	+ 39.5%
RevPAR	\$184.54	\$140.03	\$252.69	+ 36.9%	+ 80.5%

	January 2020	January 2021	January 2022	% Change from 2020	% Change from 2021
Visitors	134,300	114,000	124,300	- 7.4%	+ 9.0%
Room Nights	220,900	181,400	225,900	+ 2.3%	+ 24.5%
Direct Spending	\$136,244,600	\$115,032,900	\$143,787,900	+ 5.5%	+ 25.0%
Economic Impact	\$203,140,700	\$171,514,100	\$214,387,800	+ 5.5%	+ 25.0%



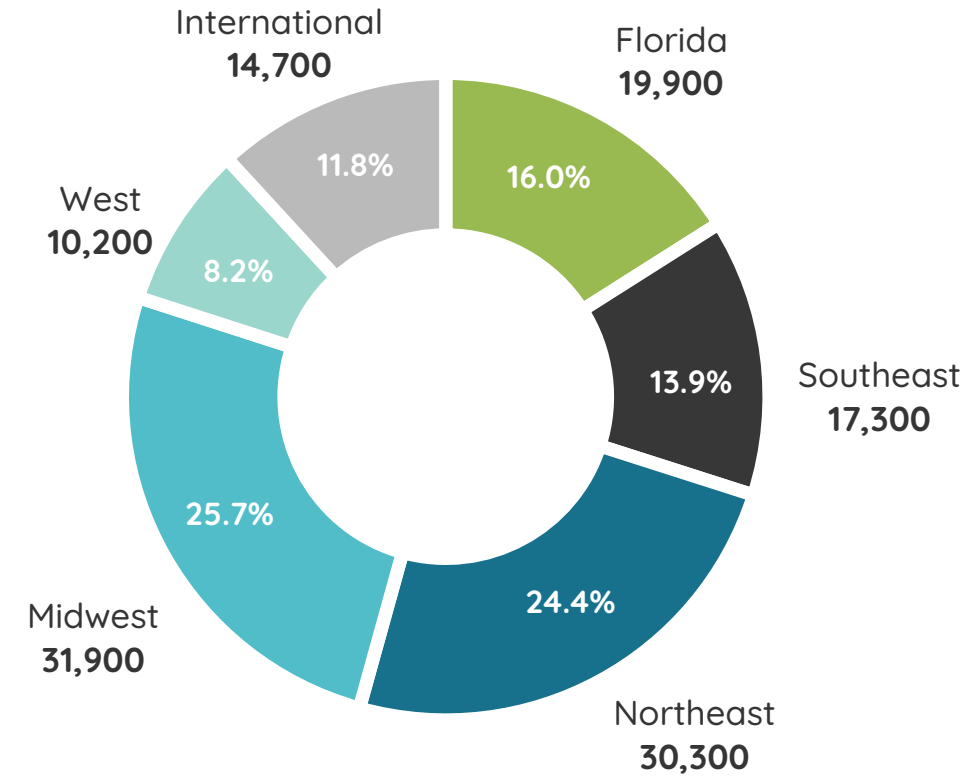
* Visitors staying in paid accommodations.

JANUARY 2022 OVERNIGHT VISITOR ORIGIN MARKETS*

Region	January 2021		January 2022		Percent Change (Δ%)	
	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	50,300	44.2%	19,900	16.0%	- 60.4%	- 63.8%
Southeast	9,500	8.3%	17,300	13.9%	+ 82.1%	+ 67.5%
Northeast	29,200	25.6%	30,300	24.4%	+ 3.8%	- 4.7%
Midwest	21,000	18.4%	31,900	25.7%	+ 51.9%	+ 39.7%
West ¹	0	0.0%	10,200	8.2%	-	-
Canada ²	500	0.4%	3,900	3.1%	+ 680.0%	+ 675.0%
Europe ²	3,500	3.1%	7,700	6.2%	+ 120.0%	+ 100.0%
C/S America ²	0	0.0%	1,200	1.0%	-	-
Other	0	0.0%	1,900	1.5%	-	-
Total	114,000	100.0%	124,300	100.0%		

¹ Visitation from western U.S. states not separated from "other" category in January 2021.

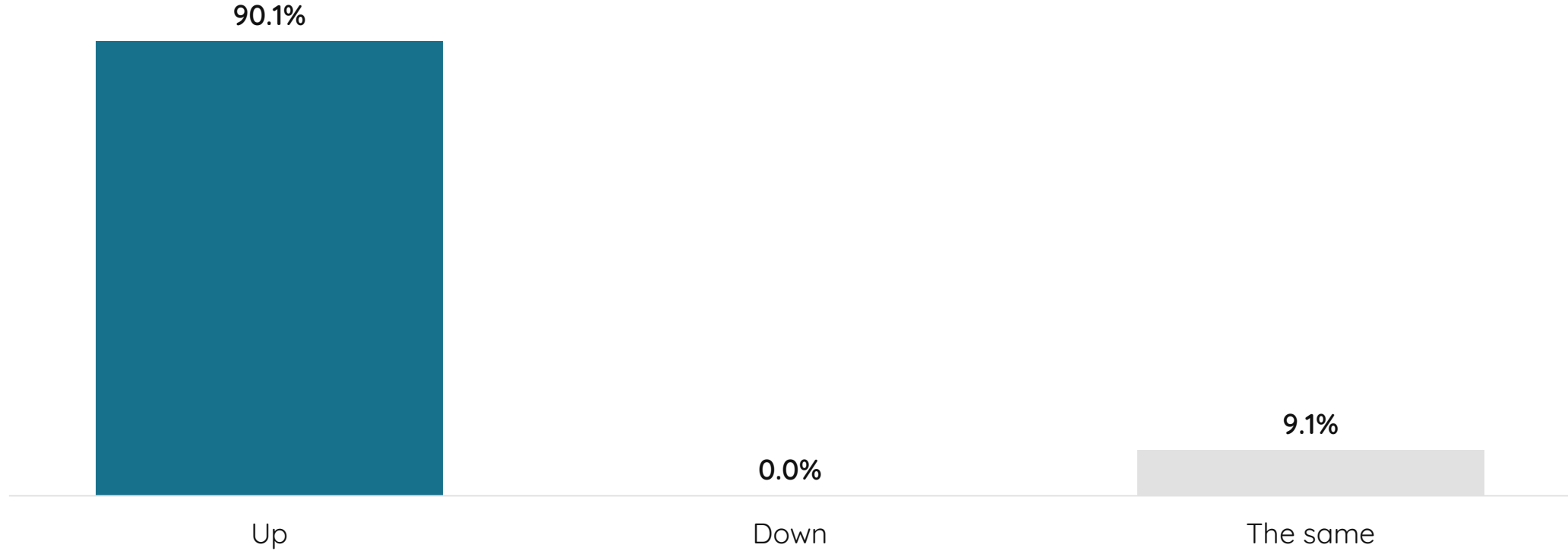
² Visitation from international markets was too small to estimate for most of 2020 and 2021.



* 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?



DESTINATION COMPARISONS



OCCUPANCY COMPARISONS

	Occupancy Rate (%)				Δ% from January 2020				Δ% from January 2021			
	Trans	Group	Cont	Total	Trans	Group	Cont	Total	Trans	Group	Cont	Total
Naples	49.6%	20.0%	0.1%	69.7%	15.3%	202.7%	152.3%	40.3%	43.3%	-41.6%	-39.6%	1.1%
Miami	53.3%	10.1%	4.9%	68.2%	11.2%	317.5%	48.6%	27.3%	-1.4%	-49.5%	10.1%	-12.9%
Florida Keys	67.1%	13.1%	0.5%	80.7%	9.8%	283.3%	12.0%	24.2%	5.9%	1.0%	1.8%	5.1%
Fort Myers	59.1%	13.4%	4.3%	76.8%	23.2%	283.1%	40.0%	40.9%	7.4%	-28.3%	85.0%	1.0%
Sarasota	55.7%	12.9%	1.5%	70.1%	21.0%	140.2%	79.5%	34.2%	22.4%	-37.1%	130.4%	5.2%
Clearwater	49.5%	14.7%	0.0%	64.1%	11.1%	233.3%	-100.0%	30.1%	15.8%	-41.8%	-100.0%	-5.5%
St. Petersburg	47.1%	11.4%	1.2%	59.8%	4.7%	78.4%	0.9%	13.6%	12.8%	-53.6%	74.3%	-10.9%
Palm Beach	51.3%	12.5%	1.8%	65.6%	14.1%	103.7%	60.3%	25.6%	-1.6%	-46.7%	17.0%	-15.0%
Ft. Lauderdale	55.3%	8.8%	2.9%	67.0%	8.9%	172.3%	2.2%	17.8%	0.1%	-54.7%	-20.5%	-14.4%

¹Metrics provided by STR.

ROOM RATE COMPARISONS

	Average Daily Rate (\$)				Δ% from January 2020				Δ% from January 2021			
	Trans	Group	Cont	Total	Trans	Group	Cont	Total	Trans	Group	Cont	Total
Naples	\$364.13	\$256.95	\$168.70	\$333.20	36.8%	20.9%	-13.3%	28.6%	20.0%	-2.5%	0.4%	17.6%
Miami	\$293.07	\$272.68	\$120.02	\$277.70	47.8%	48.5%	12.5%	44.6%	23.4%	12.9%	7.3%	20.0%
Florida Keys	\$460.51	\$372.32	\$314.35	\$445.30	55.0%	13.1%	80.9%	49.5%	61.0%	31.1%	67.9%	56.2%
Fort Myers	\$206.51	\$187.49	\$132.68	\$199.04	37.4%	36.7%	23.2%	35.4%	29.1%	15.0%	37.4%	25.4%
Sarasota	\$191.36	\$156.23	\$74.00	\$182.35	49.3%	33.9%	23.9%	44.9%	42.1%	13.8%	9.0%	35.2%
Clearwater	\$167.05	\$145.52	\$0.00	\$162.13	45.6%	25.0%	-100.0%	41.6%	22.5%	4.7%	-100.0%	18.1%
St. Petersburg	\$169.37	\$142.06	\$91.11	\$162.53	43.7%	45.7%	-25.0%	40.7%	25.0%	3.1%	15.5%	19.8%
Palm Beach	\$297.32	\$253.58	\$110.60	\$283.72	66.7%	-12.6%	20.3%	49.6%	30.3%	13.8%	8.4%	26.7%
Ft. Lauderdale	\$182.59	\$192.18	\$112.38	\$180.78	50.4%	76.9%	13.1%	51.2%	11.7%	-4.2%	-14.0%	5.7%

¹Metrics provided by STR.

ROOM REVENUE COMPARISONS

	Revenue per Available Room (\$)				Δ% from January 2020				Δ% from January 2021			
	Trans	Group	Cont	Total	Trans	Group	Cont	Total	Trans	Group	Cont	Total
Naples	\$180.75	\$51.36	\$0.12	\$232.23	57.8%	265.9%	118.8%	80.5%	71.9%	-43.0%	-39.4%	18.8%
Miami	\$156.24	\$27.43	\$5.85	\$189.52	64.3%	520.2%	67.2%	84.0%	21.7%	-42.9%	18.2%	4.5%
Florida Keys	\$309.13	\$48.65	\$1.61	\$359.40	70.2%	333.4%	102.6%	85.6%	70.5%	32.4%	71.0%	64.1%
Fort Myers	\$122.03	\$25.19	\$5.72	\$152.94	69.4%	423.9%	72.6%	90.8%	38.6%	-17.5%	154.3%	26.6%
Sarasota	\$106.56	\$20.12	\$1.13	\$127.80	80.6%	221.6%	122.5%	94.4%	73.9%	-28.4%	151.1%	42.3%
Clearwater	\$82.68	\$21.33	\$0.00	\$104.01	61.7%	316.5%	-100.0%	84.3%	41.9%	-39.0%	-100.0%	11.5%
St. Petersburg	\$79.82	\$16.22	\$1.13	\$97.18	50.4%	160.0%	-24.3%	59.8%	41.0%	-52.2%	101.4%	6.7%
Palm Beach	\$152.43	\$31.73	\$2.05	\$186.20	90.1%	78.1%	92.9%	88.0%	28.2%	-39.4%	26.8%	7.8%
Ft. Lauderdale	\$100.99	\$16.84	\$3.28	\$121.11	63.7%	381.6%	15.6%	78.1%	11.8%	-56.6%	-31.6%	-9.6%

¹Metrics provided by STR.

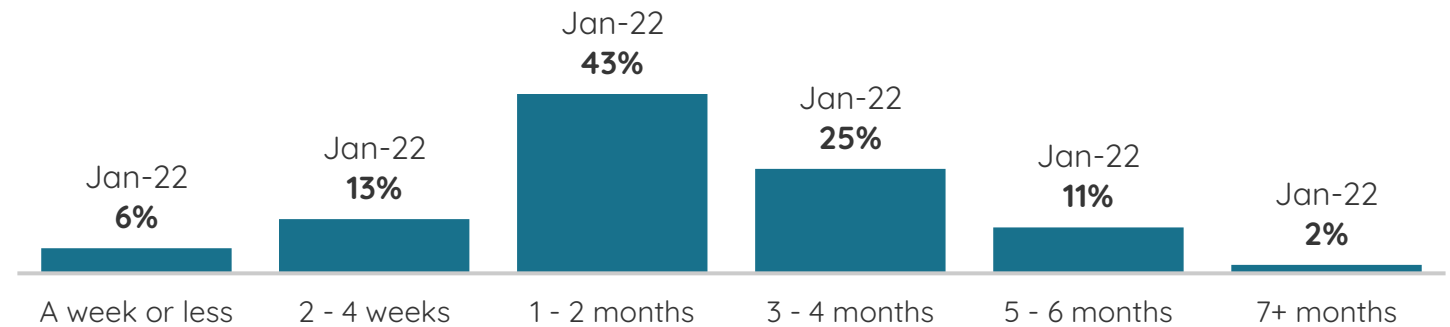
JANUARY 2022 VISITOR PROFILE

OF OVERNIGHT VISITORS



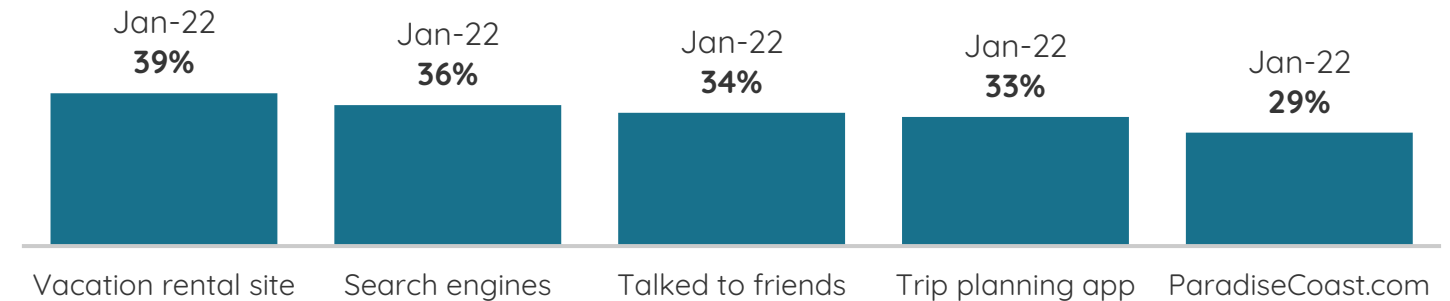
TRIP PLANNING DECISIONS*

Trip Planning Cycle			
	Jan-21	Jan-22	Trend
A week or less	-	6%	-
2 - 4 weeks	-	13%	-
1 - 2 months	-	43%	-
3 - 4 months	-	25%	-
5 - 6 months	-	11%	-
7+ months	-	2%	-
Median (days)	-	54	-



Top Trip Planning Resources ¹			
	Jan-21	Jan-22	Trend
Vacation rental site	-	39%	-
Search engines	-	36%	-
Talked to friends	-	34%	-
Trip planning app	-	33%	-
ParadiseCoast.com	-	29%	-

¹ Multiple responses permitted.



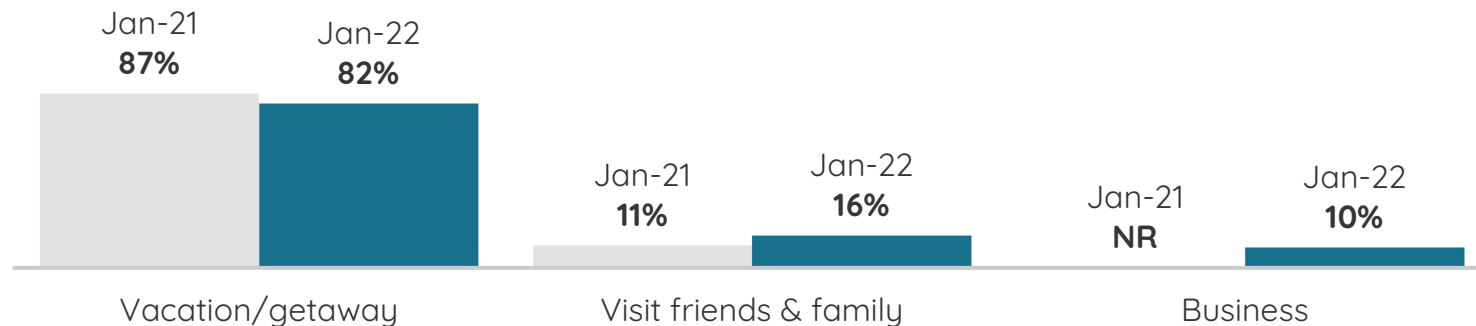
* Visitors staying in paid accommodations.

DECISIONS TO VISIT*

Top Reasons for Visiting¹

	Jan-21	Jan-22	Trend
Vacation/getaway	87%	82%	↓
Visit friends & family	11%	16%	↑
Business	-	10%	-

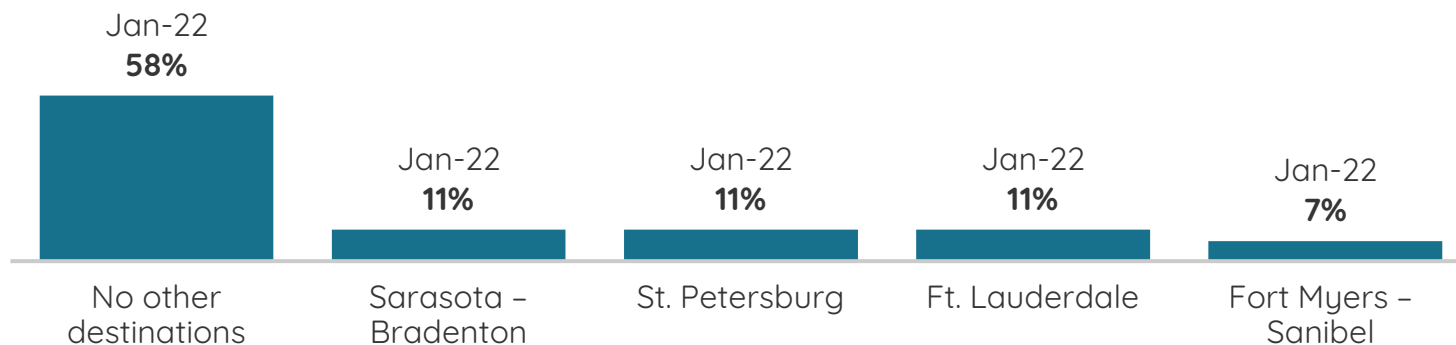
¹ Multiple responses permitted.



Other Destinations Considered¹

	Jan-21	Jan-22	Trend
No other destinations	-	58%	-
Sarasota – Bradenton	-	11%	-
St. Petersburg	-	11%	-
Ft. Lauderdale	-	11%	-
Fort Myers – Sanibel	-	7%	-

¹ Multiple responses permitted.

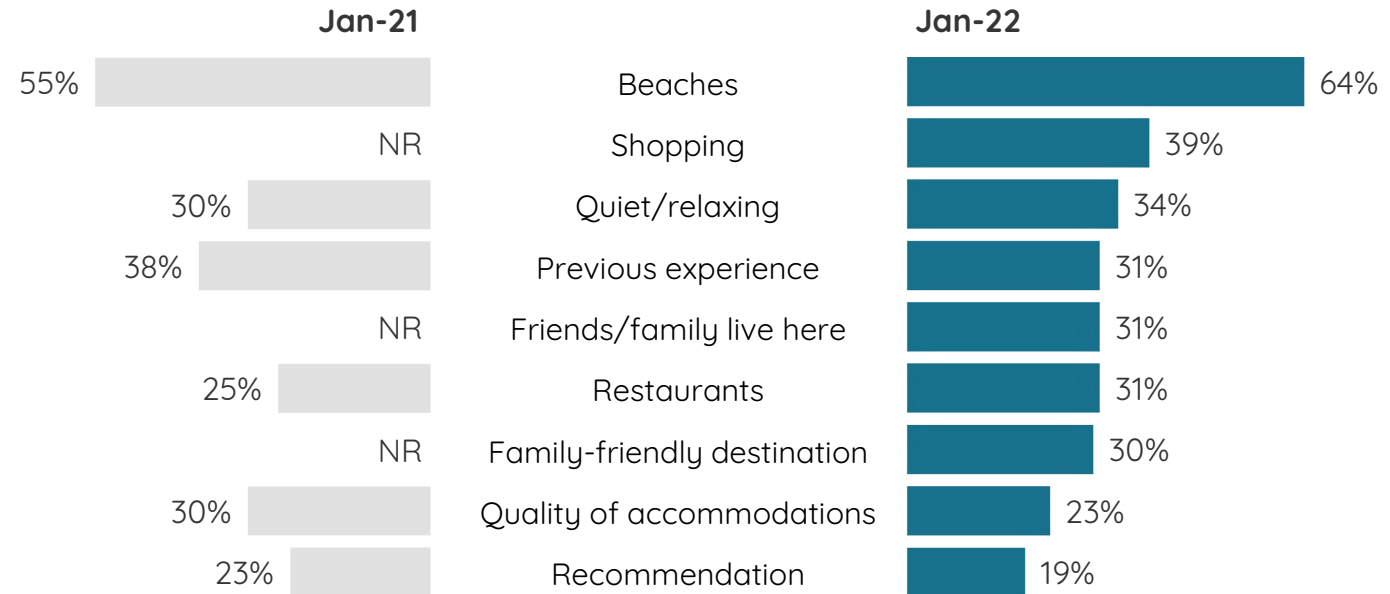


* Visitors staying in paid accommodations.

REASONS FOR CHOOSING AREA*

Reasons for Choosing Area ¹			
	Jan-21	Jan-22	Trend
Beaches	55%	64%	↑
Shopping	-	39%	-
Quiet/relaxing	30%	34%	↑
Previous experience	38%	31%	↓
Friends/family live here	-	31%	-
Restaurants	25%	31%	↓
Family-friendly destination	-	30%	-
Quality of accommodations	30%	23%	↓
Recommendation	23%	19%	↓

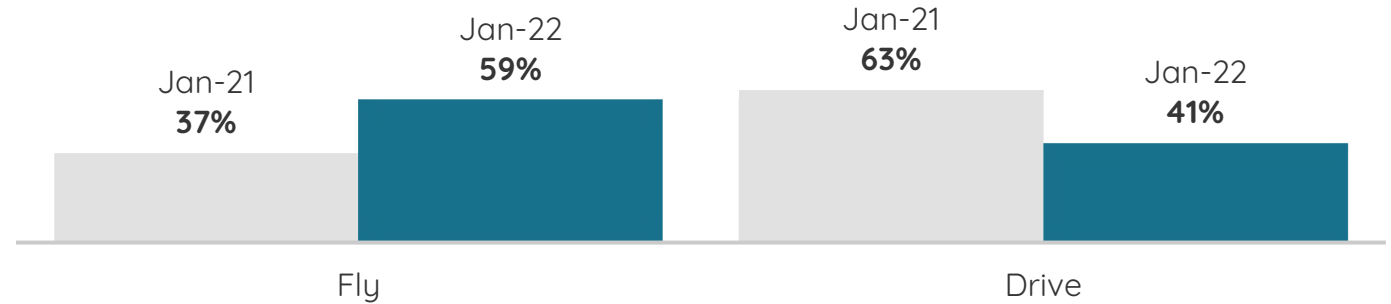
¹ Multiple responses permitted.



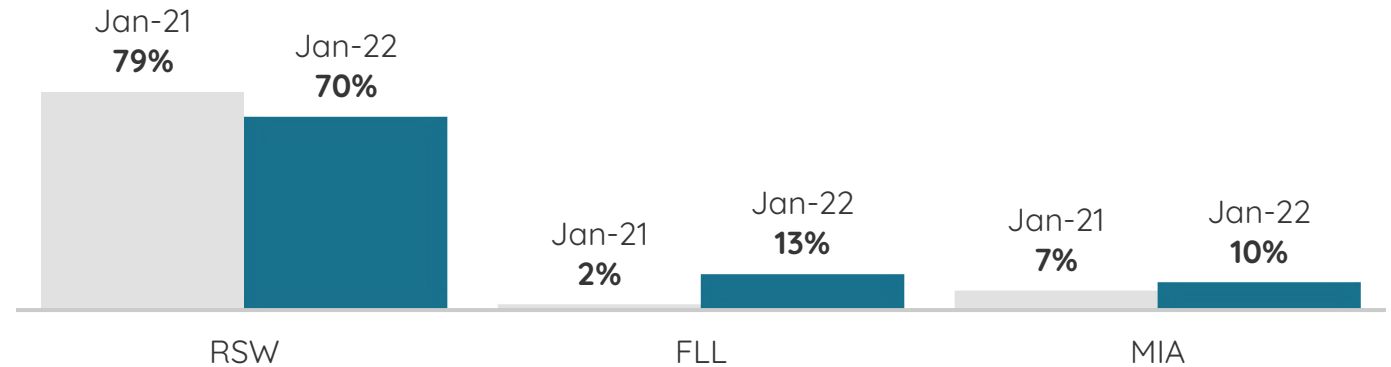
* Visitors staying in paid accommodations.

TRANSPORTATION METHODS*

Mode of Transportation			
	Jan-21	Jan-22	Trend
Fly	37%	59%	↑
Drive	63%	41%	↓



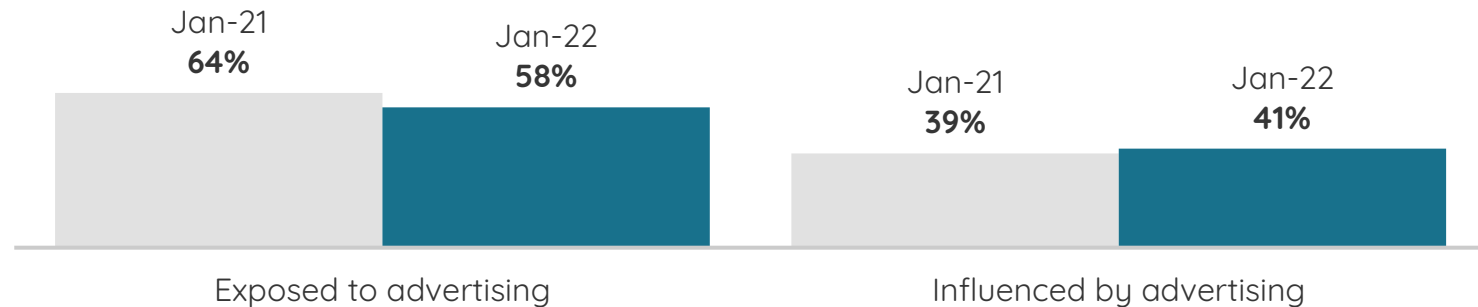
Airport Deplaned (Base: Plane)			
	Jan-21	Jan-22	Trend
SWFL Intl Airport (RSW)	79%	70%	↓
Ft. Lauderdale Intl Airport (FLL)	2%	13%	↑
Miami Intl Airport (MIA)	7%	10%	↑



* Visitors staying in paid accommodations.

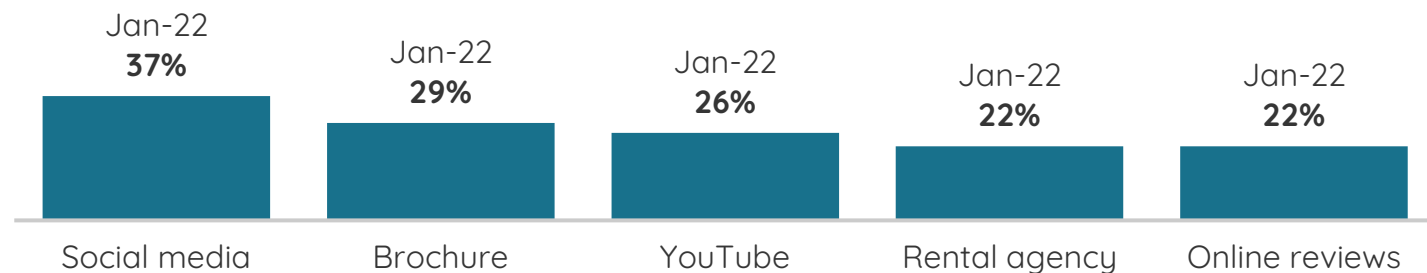
EXPOSURE TO ADVERTISING*

Advertising Exposure & Influence			
	Jan-21	Jan-22	Trend
Exposed to advertising	64%	58%	↓
Influenced by advertising	39%	41%	↑



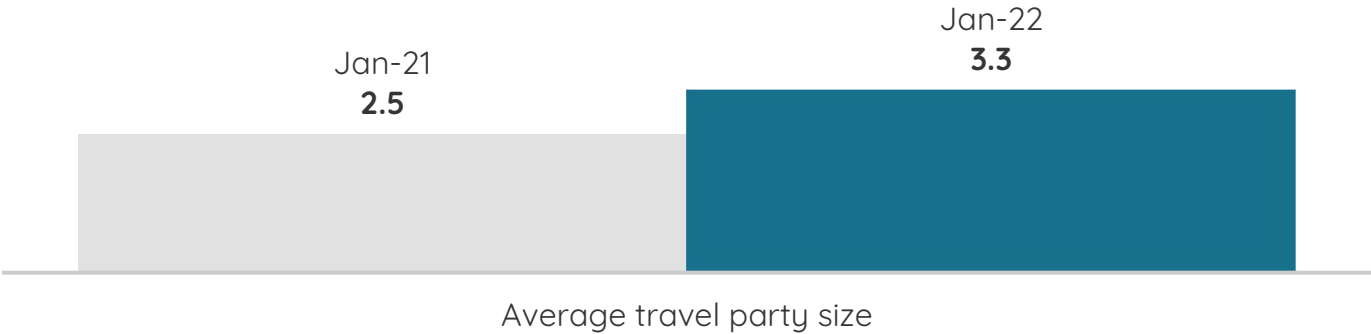
Top Advertising Sources Noticed ¹			
	Jan-21	Jan-22	Trend
Social media	-	37%	-
Brochure	-	29%	-
YouTube	-	26%	-
Rental agency	-	22%	-
Online reviews	-	22%	-

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

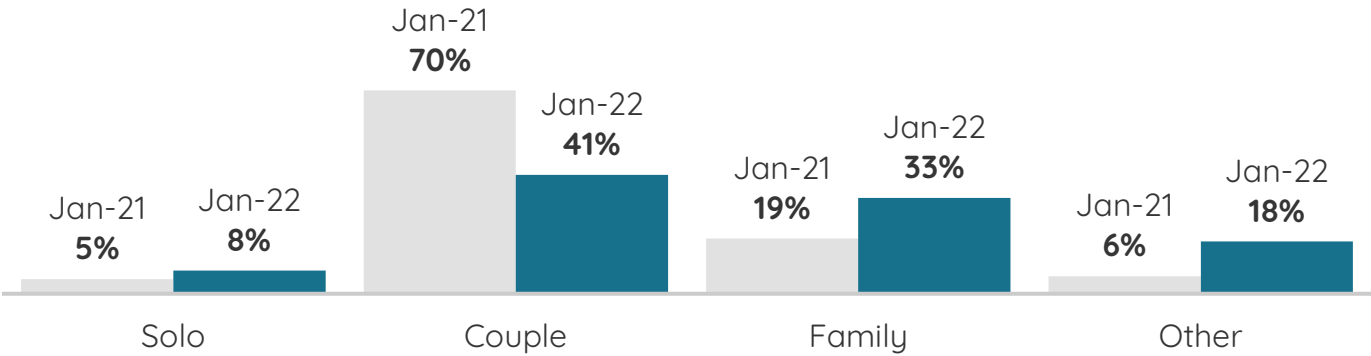


* Visitors staying in paid accommodations.

Average Visitors per Travel Party			
	Jan-21	Jan-22	Trend
Average travel party size	2.5	3.3	↑



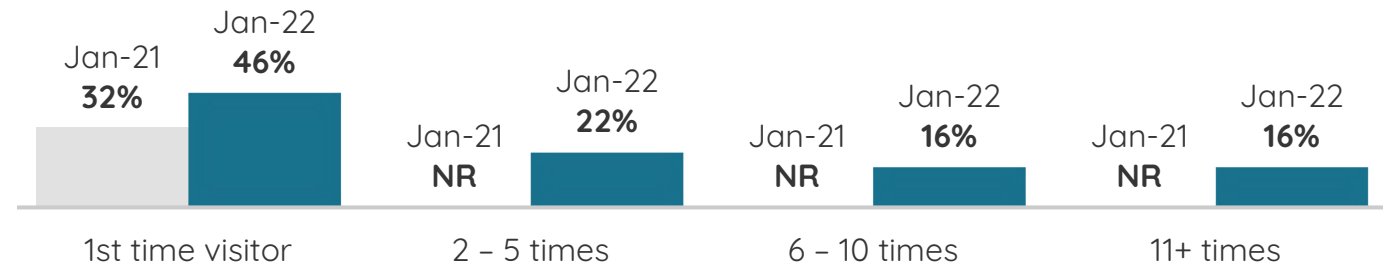
Travel Party Composition			
	Jan-21	Jan-22	Trend
Solo	5%	8%	↑
Couple	70%	41%	↓
Family	19%	33%	↑
Other	6%	18%	↑



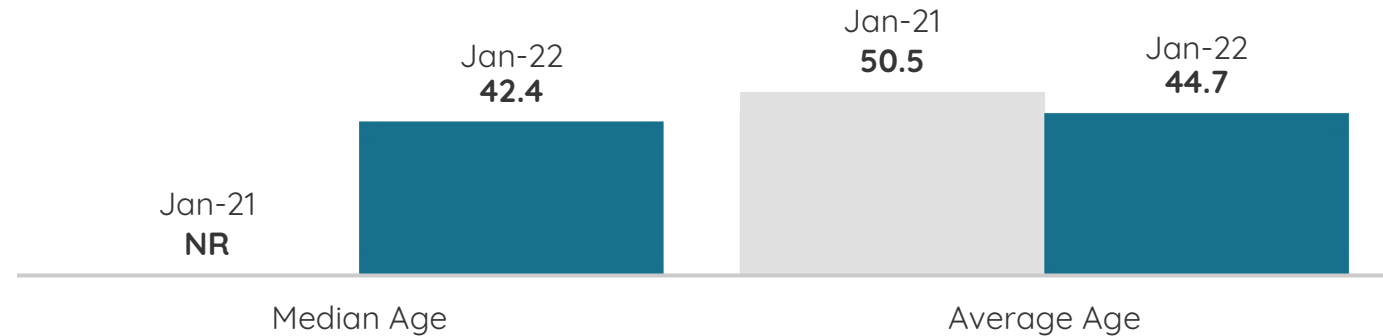
* Visitors staying in paid accommodations.

VISITING PARADISE COAST*

Previous Visits			
	Jan-21	Jan-22	Trend
1 st time visitor	32%	46%	↑
2 – 5 times	-	22%	-
6 – 10 times	-	16%	-
11+ times	-	16%	-



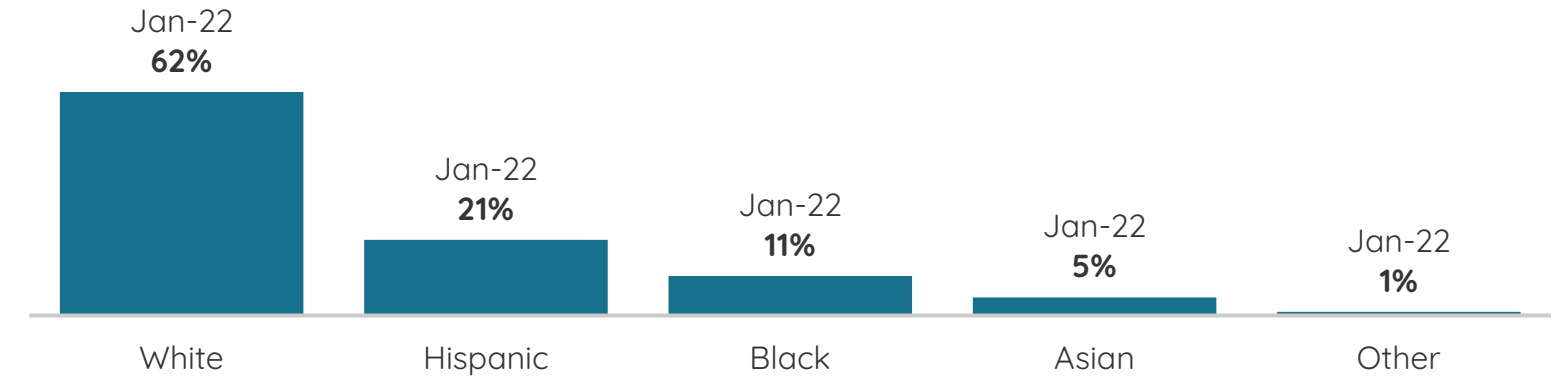
Typical Visitor Ages			
	Jan-21	Jan-22	Trend
Median Age	-	42.4	-
Average Age	50.5	44.7	↓



* Visitors staying in paid accommodations.

VISITOR DEMOGRAPHICS*

Race/Ethnicity			
	Jan-21	Jan-22	Trend
White	-	62%	-
Hispanic	-	21%	-
Black	-	11%	-
Asian	-	5%	-
Other	-	1%	-



Typical Visitor Household Income			
	Jan-21	Jan-22	Trend
Median HHI	\$158,134	\$142,300	↓

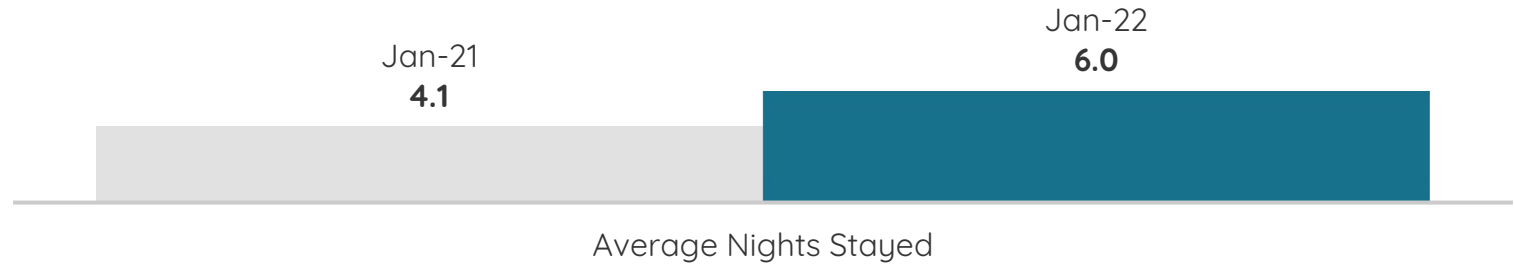


* Visitors staying in paid accommodations.

OVERNIGHT VISITS*

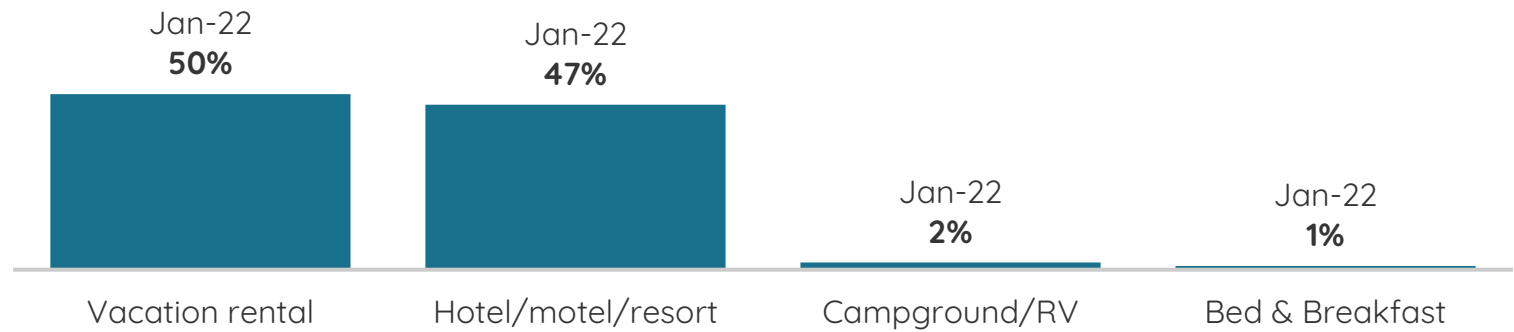
Nights in Destination

	Jan-21	Jan-22	Trend
Nights Stayed (mean)	4.1	6.0	↑



Accommodations

	Jan-21	Jan-22	Trend
Vacation rental	-	50%	-
Hotel/motel/resort	-	47%	-
Campground/RV	-	2%	-
Bed & Breakfast	-	1%	-

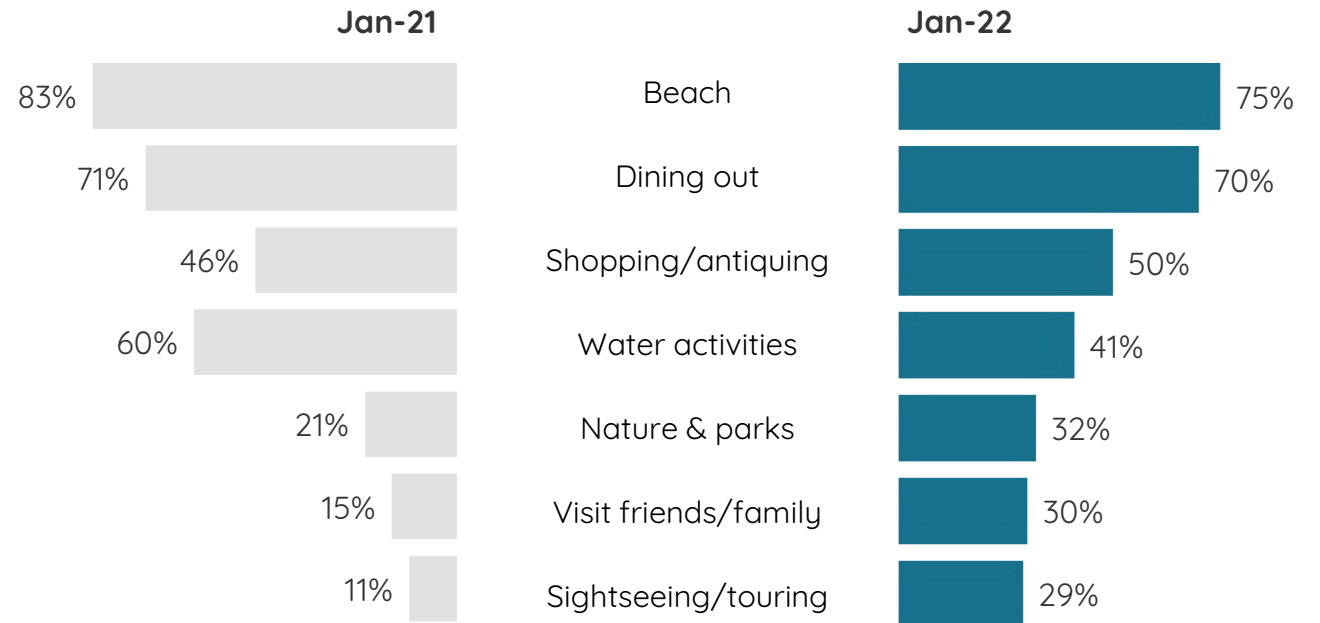


* Visitors staying in paid accommodations.

TRIP ACTIVITIES*

Trip Activities ¹			
	Jan-21	Jan-22	Trend
Beach	83%	75%	↓
Dining out	71%	70%	↓
Shopping/antiquing	46%	50%	↑
Water activities	60%	41%	↓
Nature & parks	21%	32%	↑
Visit friends/family	15%	30%	↑
Sightseeing/touring	11%	29%	↑

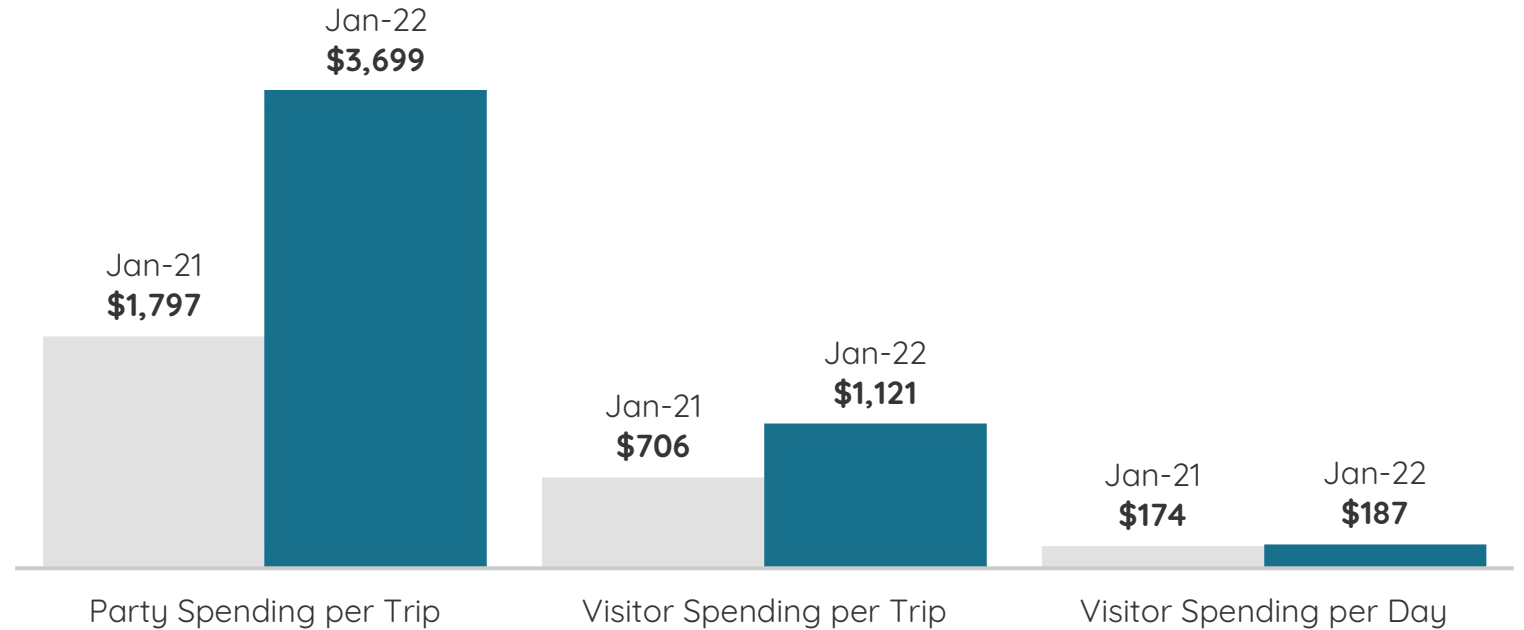
¹ Multiple responses permitted.



* Visitors staying in paid accommodations.

VISITOR SPENDING*

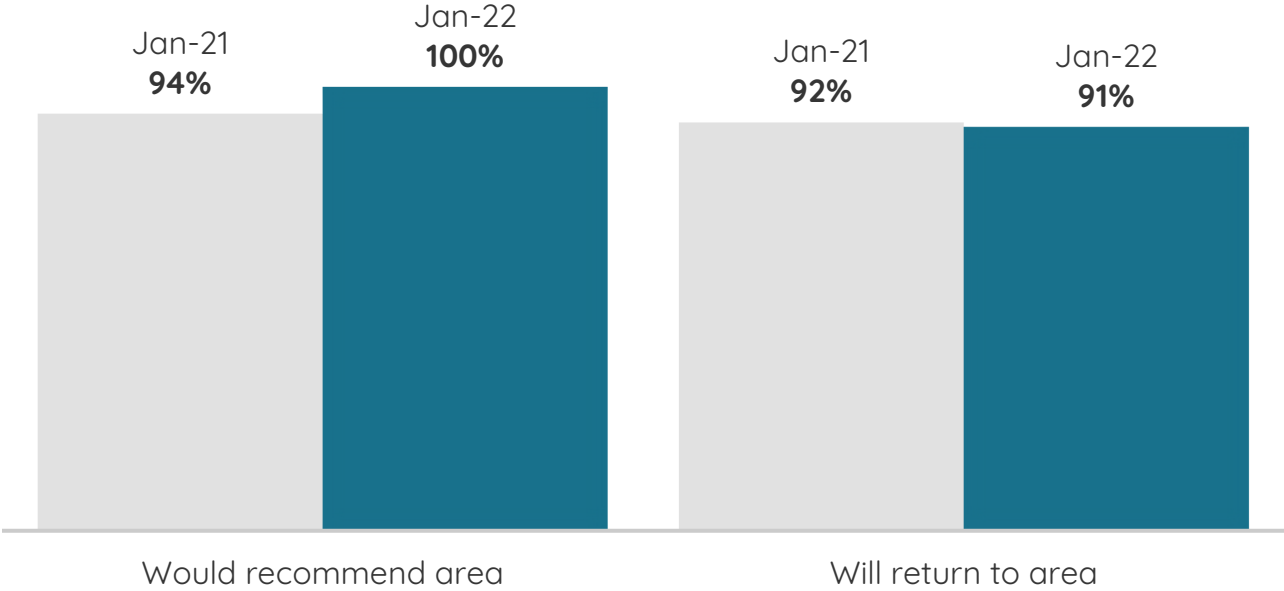
Visitor Spending			
	Jan-21	Jan-22	Trend
Party Spending per Trip	\$1,797	\$3,699	↑
Visitor Spending per Trip	\$706	\$1,121	↑
Visitor Spending per Day	\$174	\$187	↑



* Visitors staying in paid accommodations.

Satisfaction with Destination			
	Jan-21	Jan-22	Trend
Value for travel dollar ¹	-	8.8	-
Would recommend area	94%	100%	↑
Will return to area	92%	91%	↓

¹10-point scale where 10 is “excellent” and 1 is “poor”.



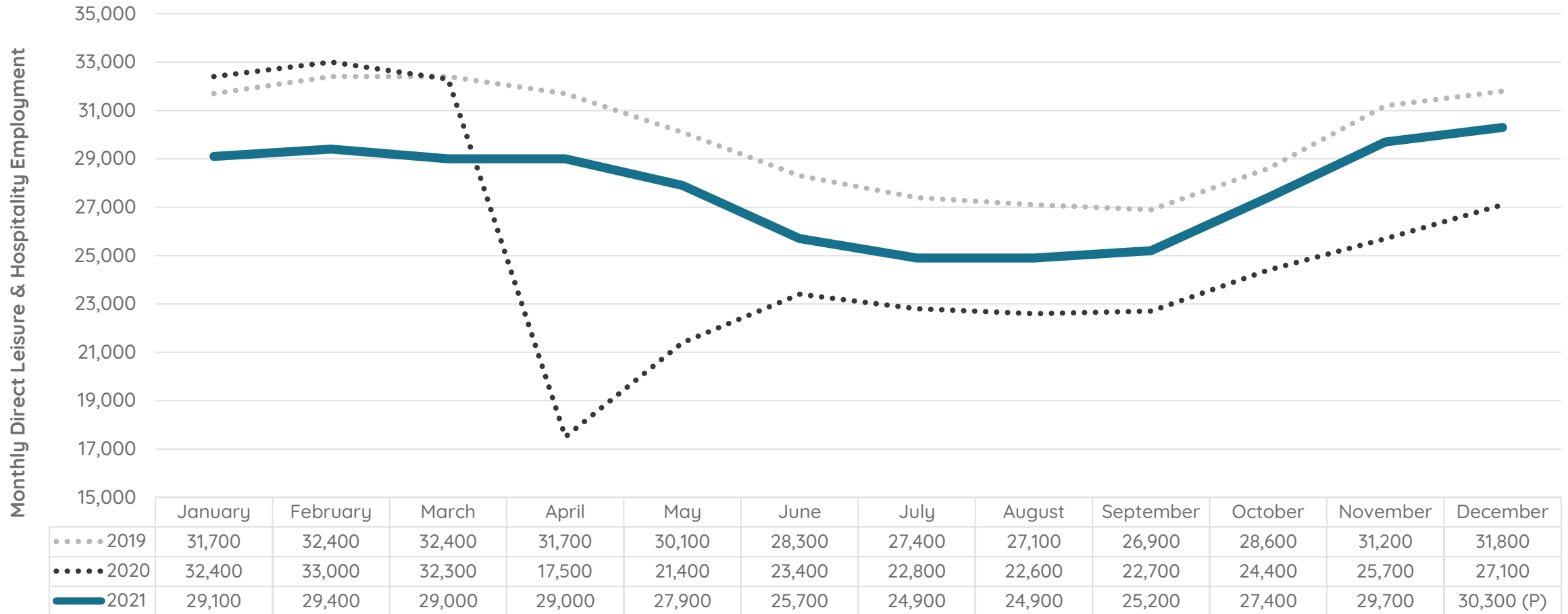
* Visitors staying in paid accommodations.

INDUSTRY DATA



LEISURE & HOSPITALTY EMPLOYMENT

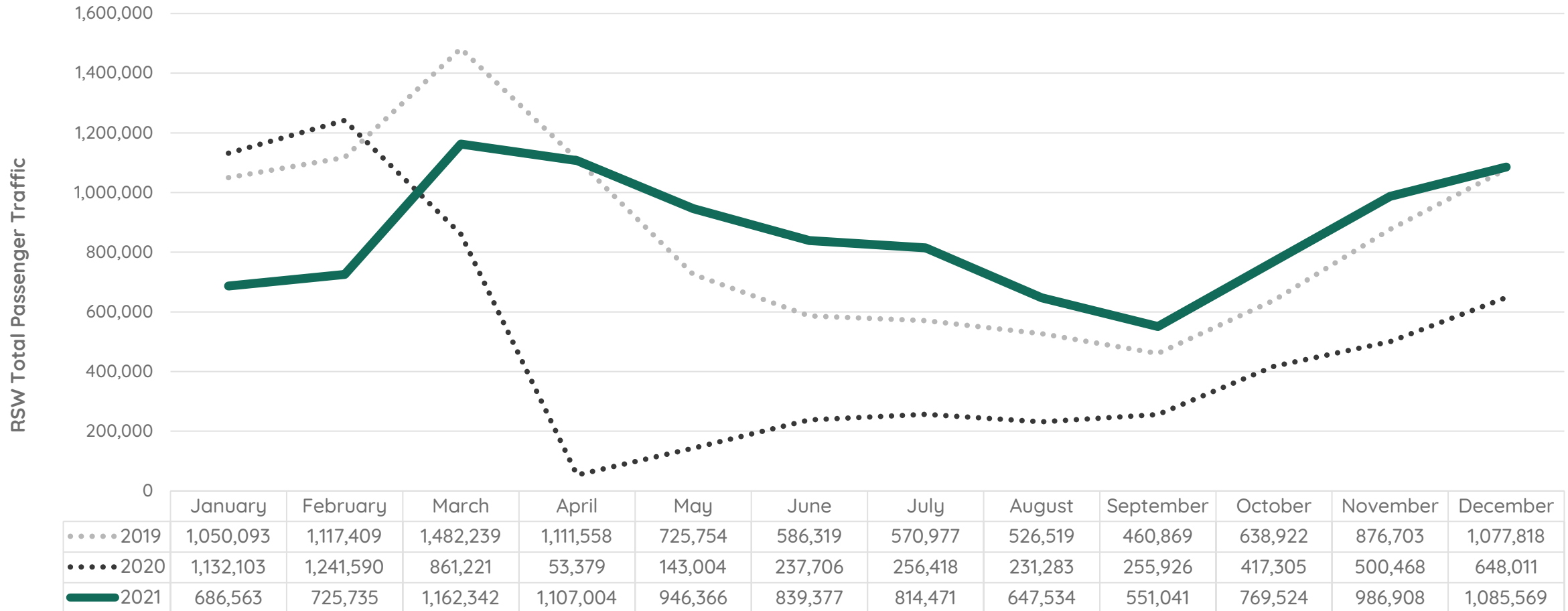
Collier County Direct Leisure and Hospitality Employment (Calendar Year)¹



¹SOURCE: 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



¹SOURCE: Lee County Port Authority Monthly Statistics.

LICENSED TRANSIENT RENTAL UNITS

January 2022 Licensed Transient Rental Units¹

	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
Total	5,946	1,960	2,827	10,733

¹SOURCE: Florida Department of Business & Professional Regulation.

NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau January 2022 Monthly Dashboard

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