

NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau
January 2023 Monthly Dashboard



MONTHLY SNAPSHOT



This report and all future reports will be based on data from ALL visitors, which includes daytrippers as well as visitors staying in unpaid accommodations. Previous reports were based solely on data from visitors who stayed in paid accommodations.



Overall visitation increases outpaced the increase in occupancy due to a higher percentage of visitors staying in second homes or visiting for the day.



Occupancy was up slightly but a dip in ADR resulted in RevPAR being down 8.7%.



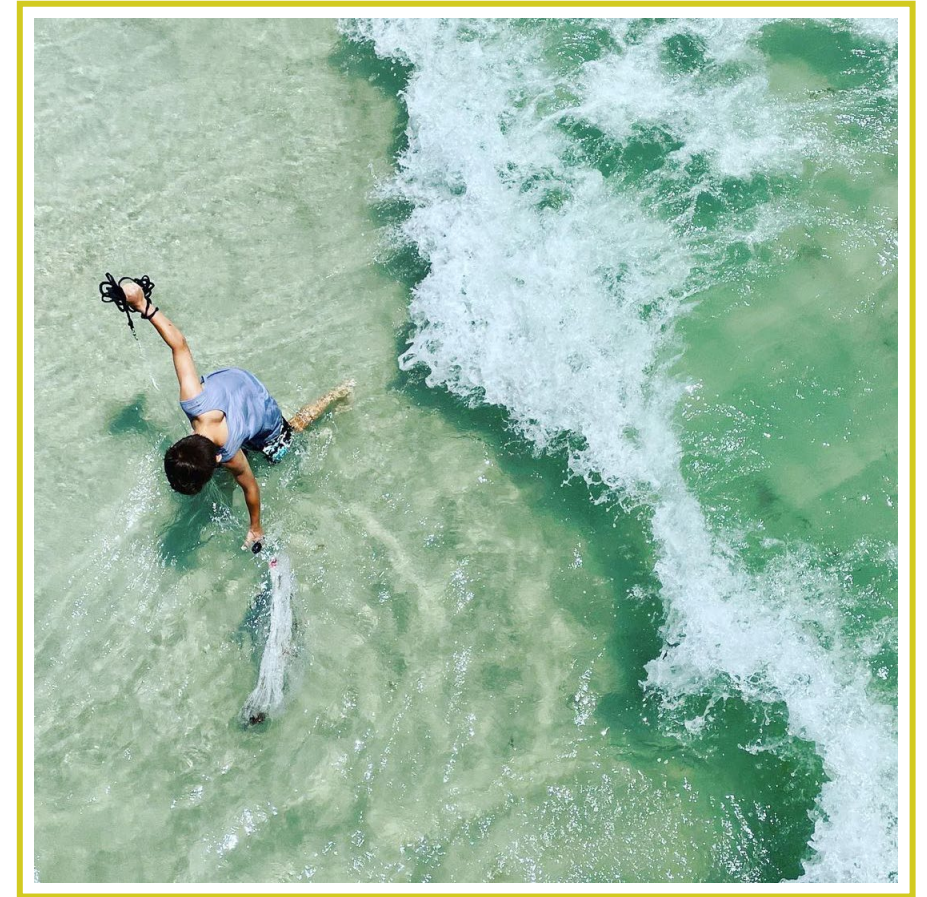
More visitors were either in-state or international visitors in January 2023.



Fewer resources were used to plan trips to the area in January 2023. This is presumably due to the significant COVID outbreak of cases in late December 2021 and peaking in early January 2022 in Florida.



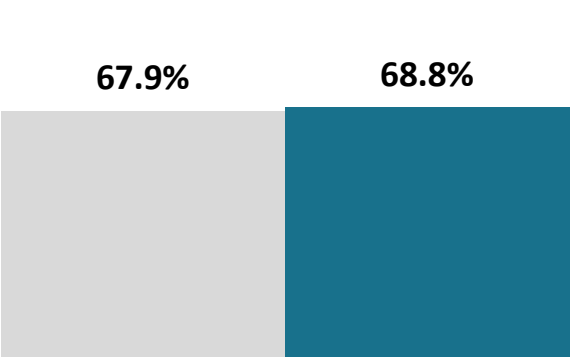
Compared to January 2022, less visitors chose to come to the Naples area because of the beaches while more visitors chose to come to the Naples area to visit friends and family.



JANUARY 2023 LODGING METRICS¹

OCCUPANCY RATE

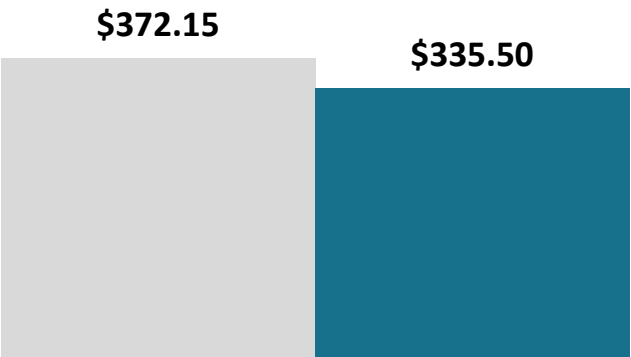
68.8%



+ 1.3% from 2022

AVERAGE DAILY RATE

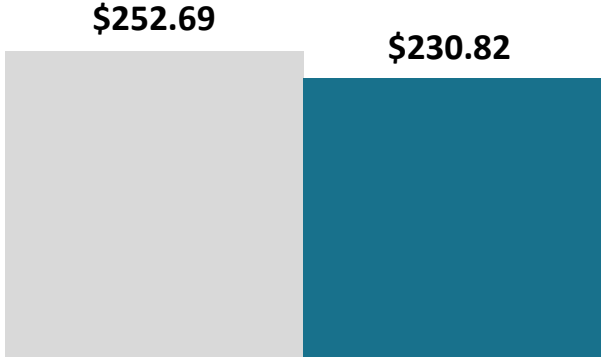
\$335.50



- 9.8% from 2022

REVENUE PER AVAILABLE ROOM

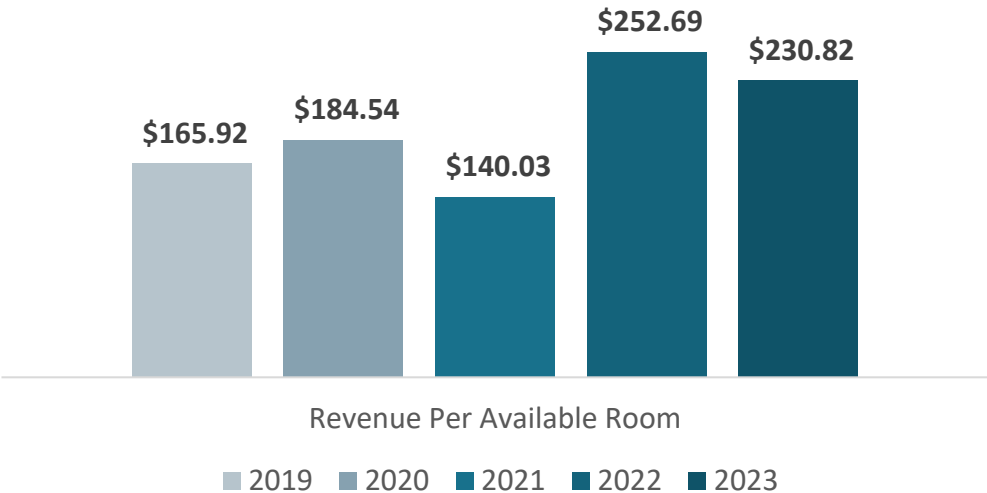
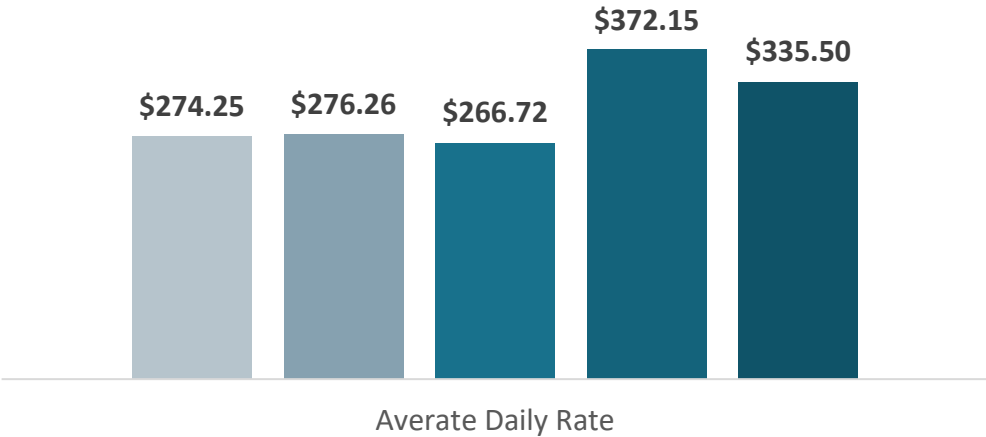
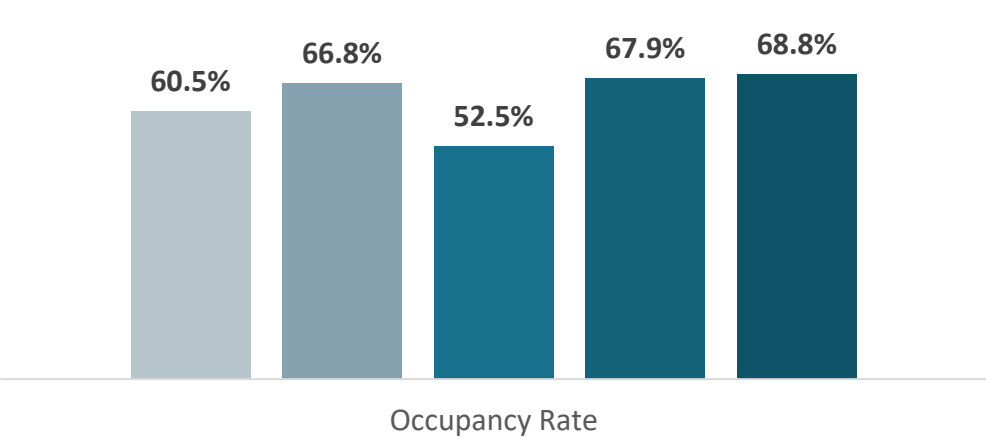
\$230.82



- 8.7% from 2022

■ Jan-22 ■ Jan-23

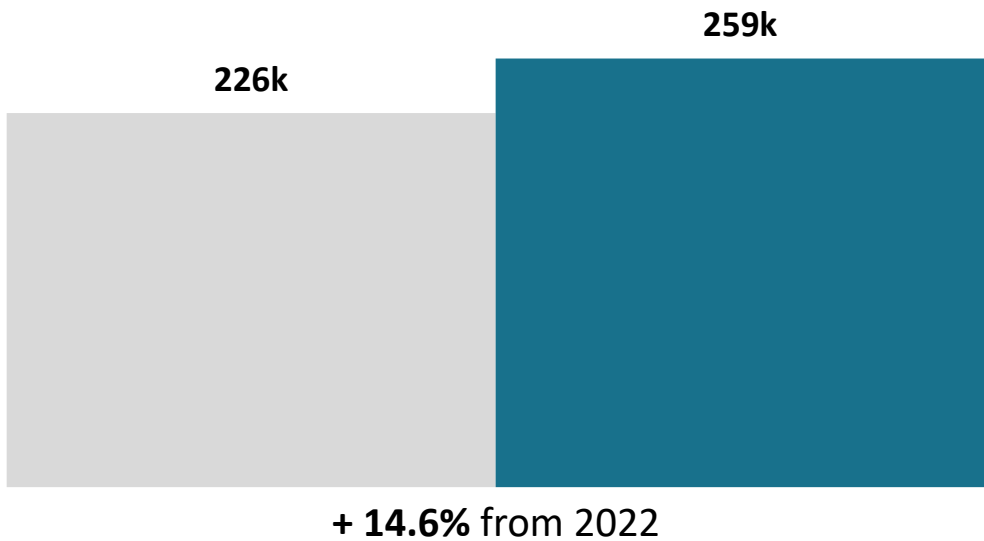
JANUARY 2019-2023 LODGING METRICS



JANUARY 2023 VISITATION & ROOM NIGHTS

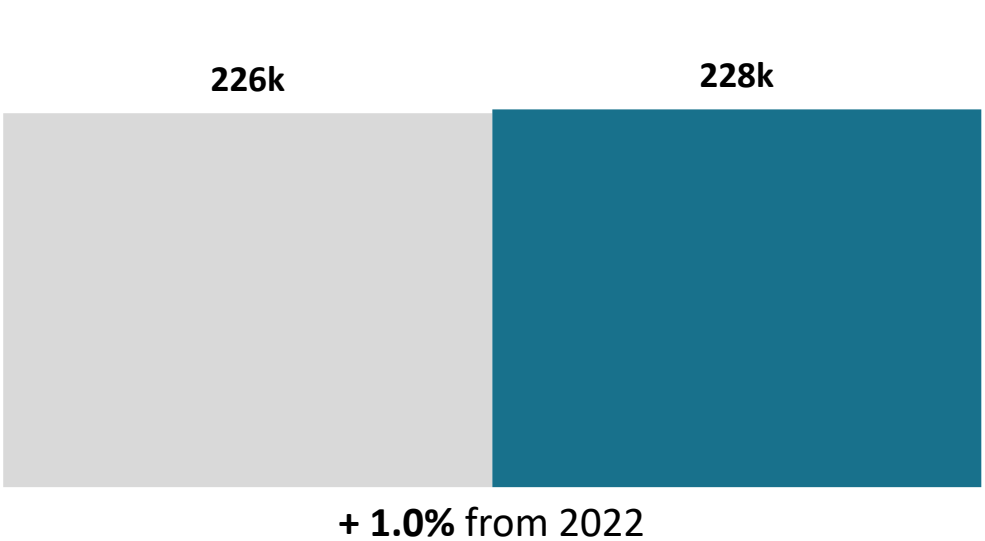
VISITORS

258,900



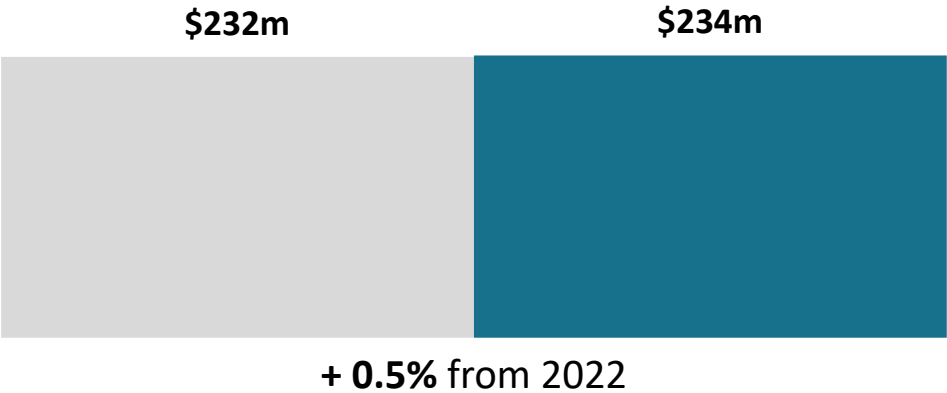
ROOM NIGHTS

228,200

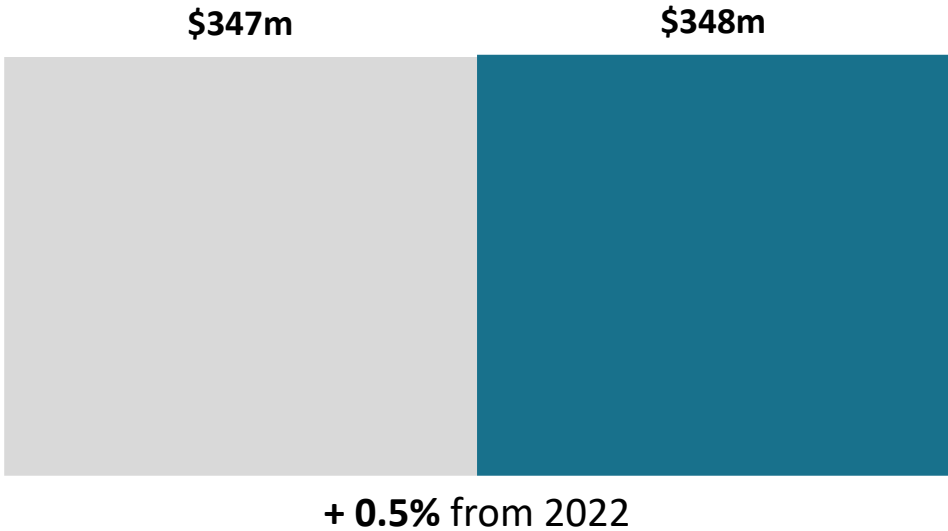


■ Jan-22 ■ Jan-23

DIRECT SPENDING
\$233,623,600



ECONOMIC IMPACT
\$348,332,800



■ Jan-22 ■ Jan-23

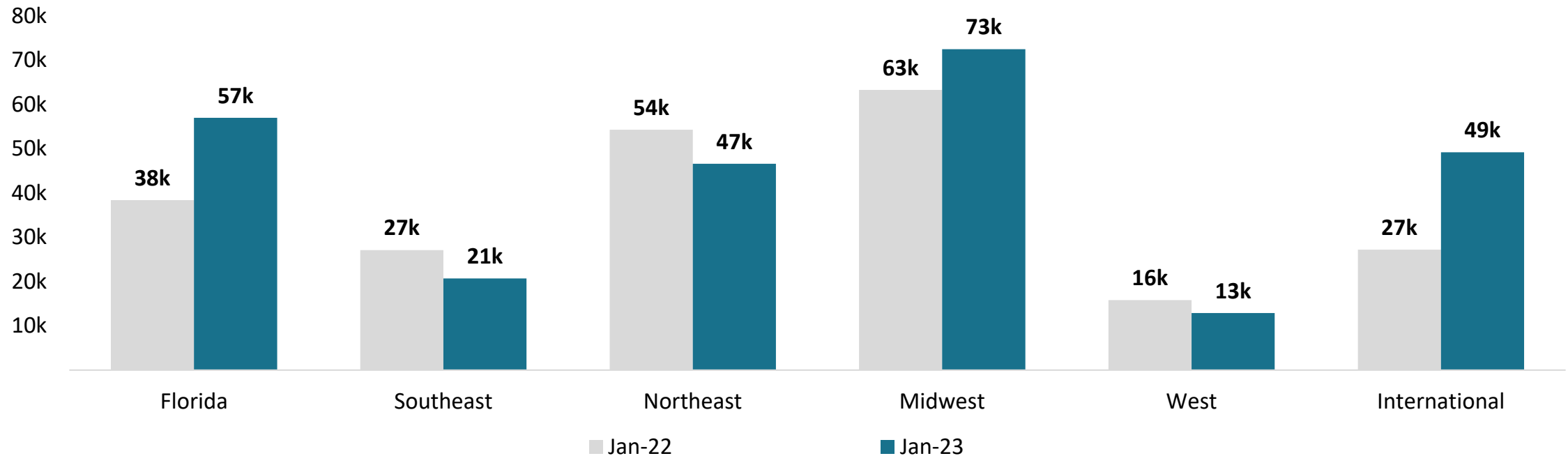
VISITOR ORIGIN

FLORIDA VISITORS

57,000

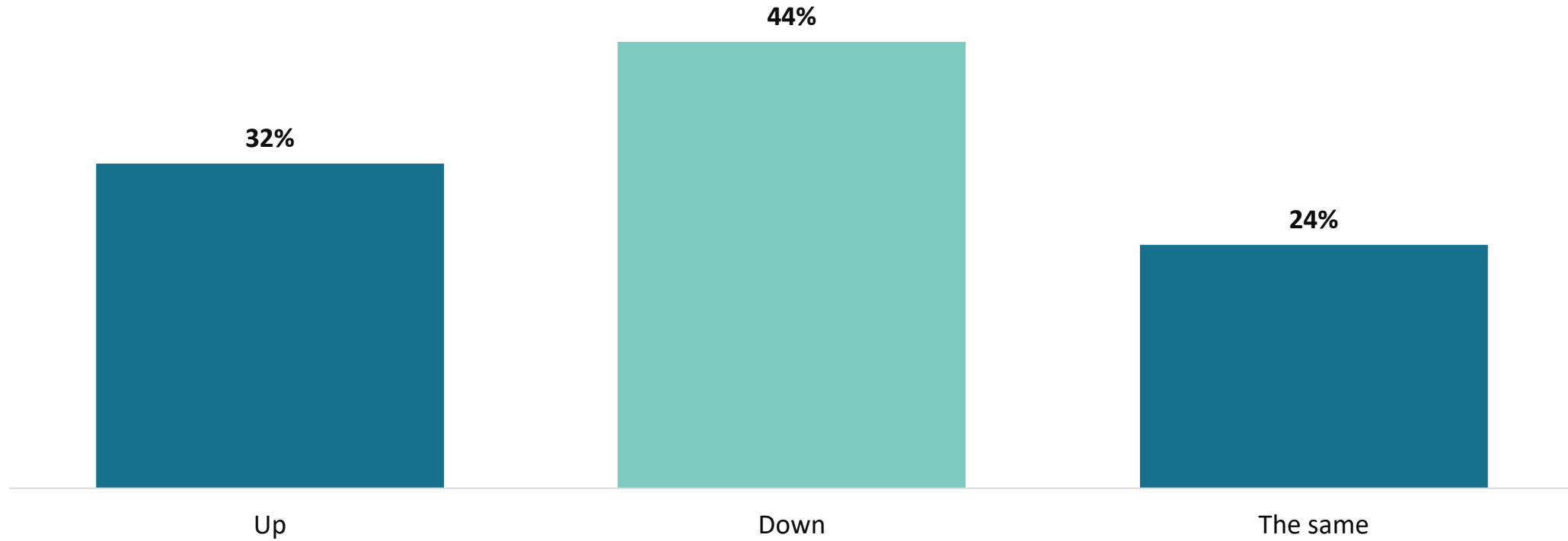
OUT-OF-STATE VISITORS

201,900



OCCUPANCY BAROMETER

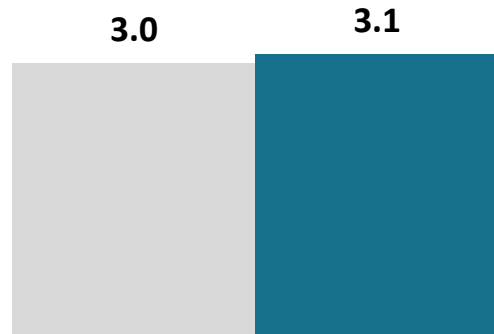
Looking ahead to the next three months, are your property's reservations up, down, or the same compared to this time last year?



TRIP CHARACTERISTICS

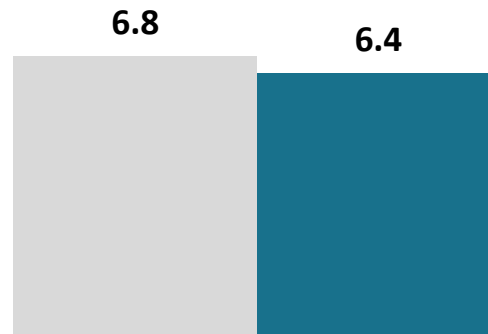
TRAVEL PARTY SIZE

3.1



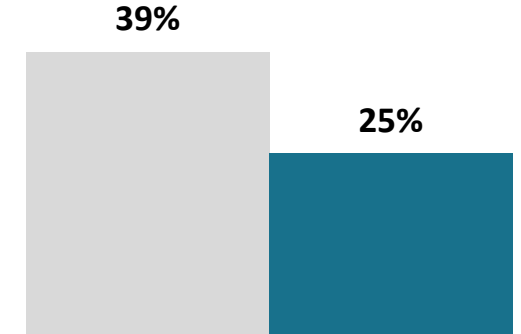
NIGHTS STAYED

6.4



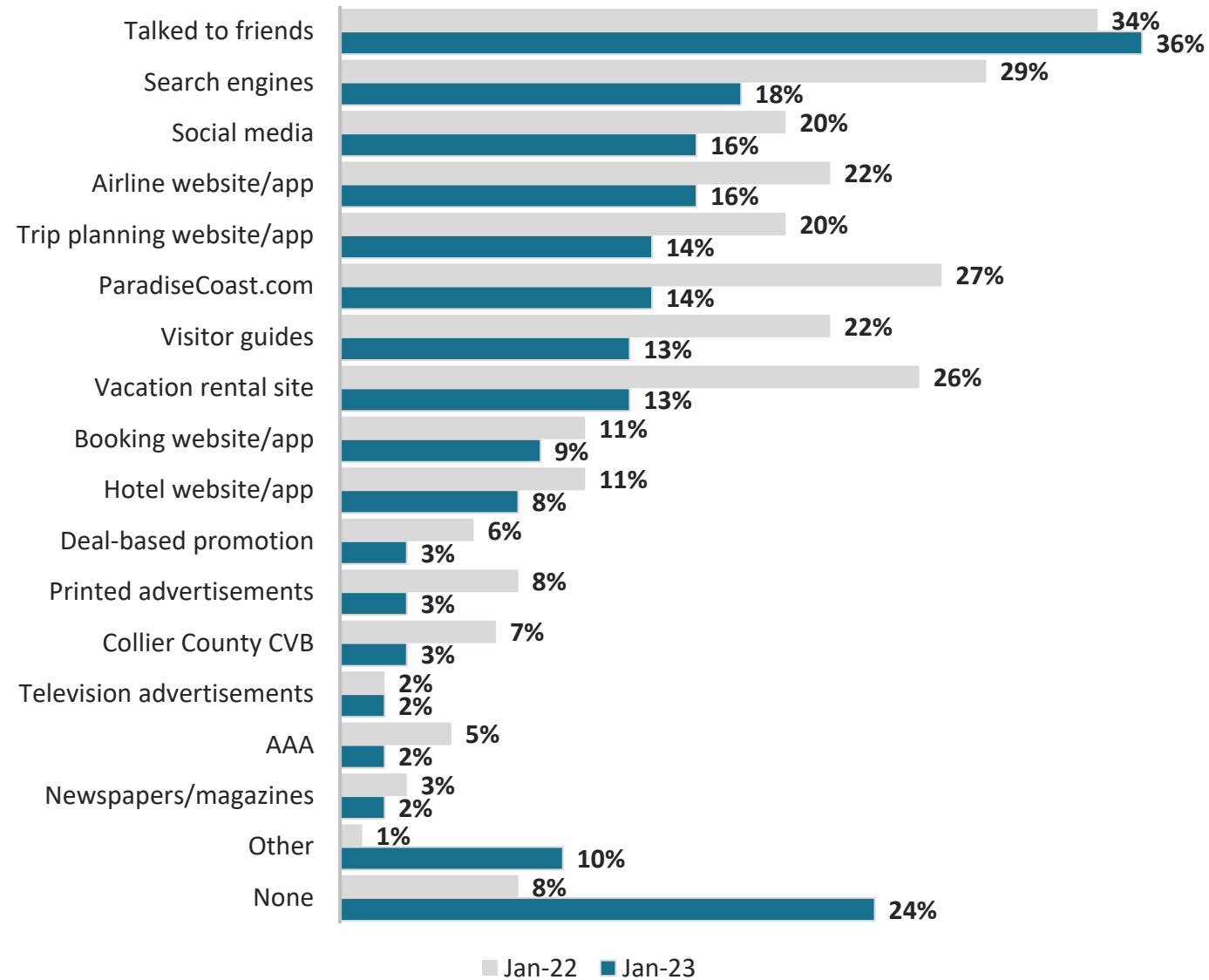
1ST TIME VISITORS

25%

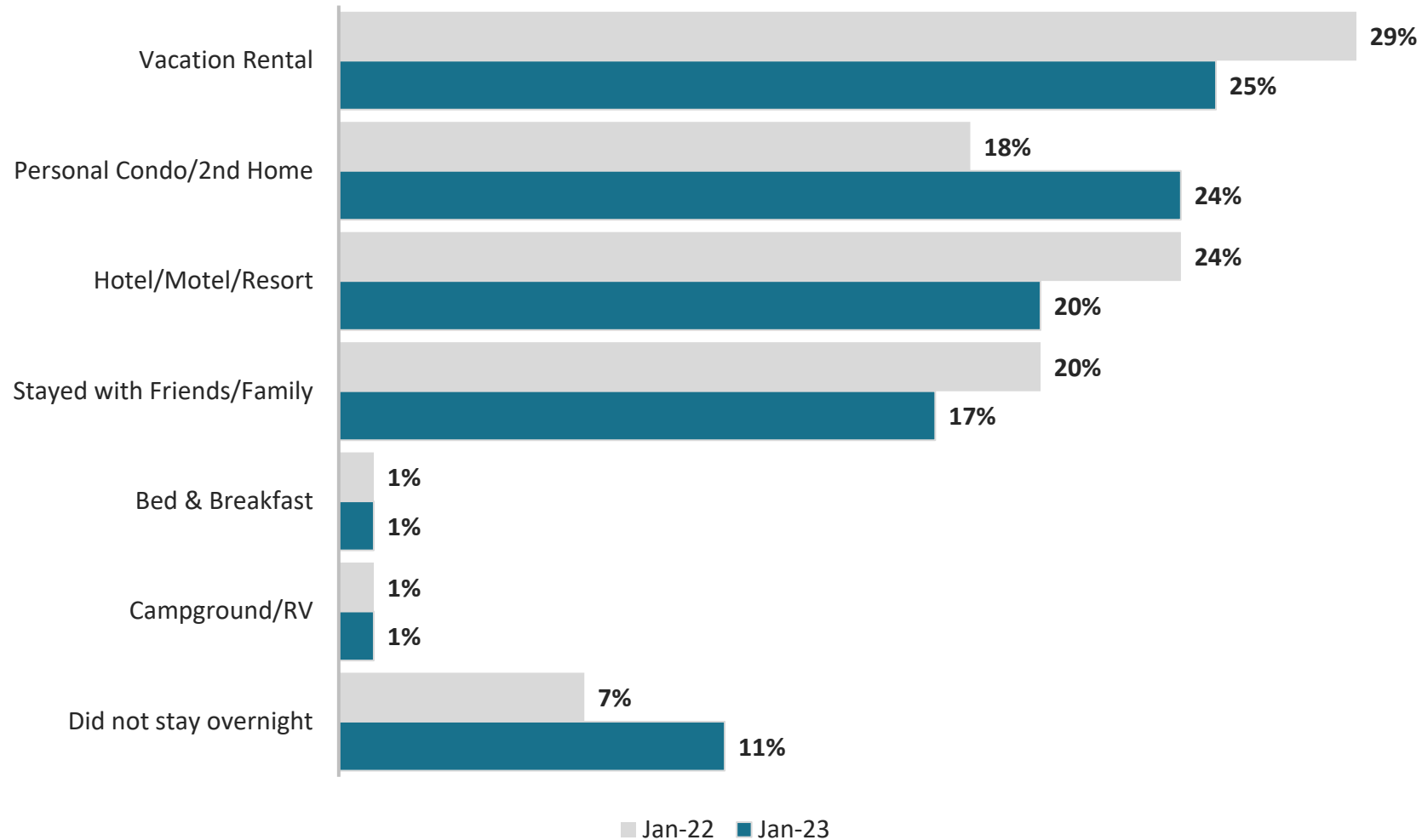


■ Jan-22 ■ Jan-23

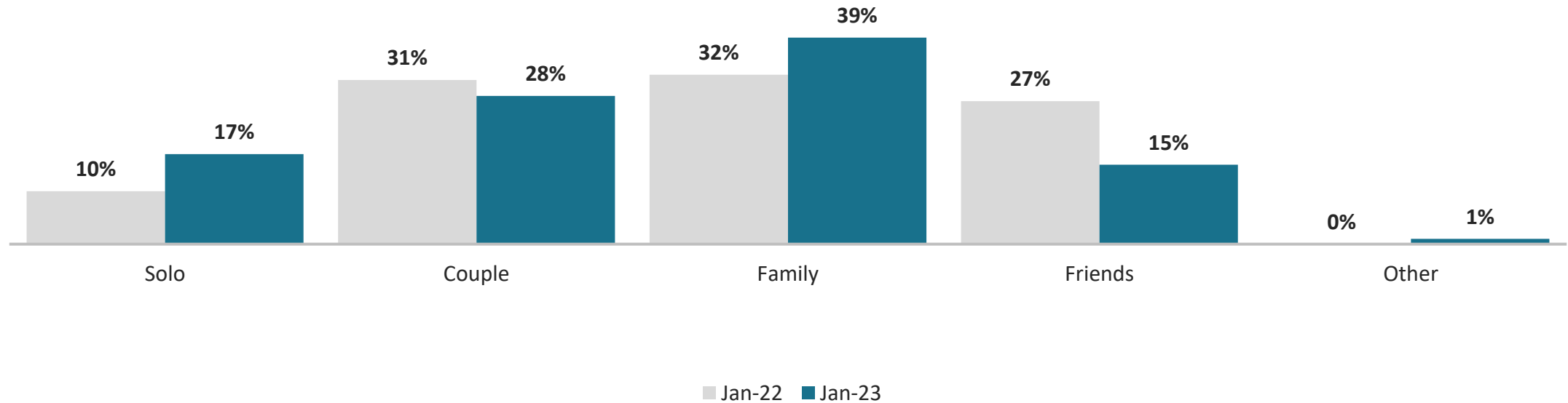
TRIP PLANNING SOURCES



TYPE OF ACCOMMODATIONS

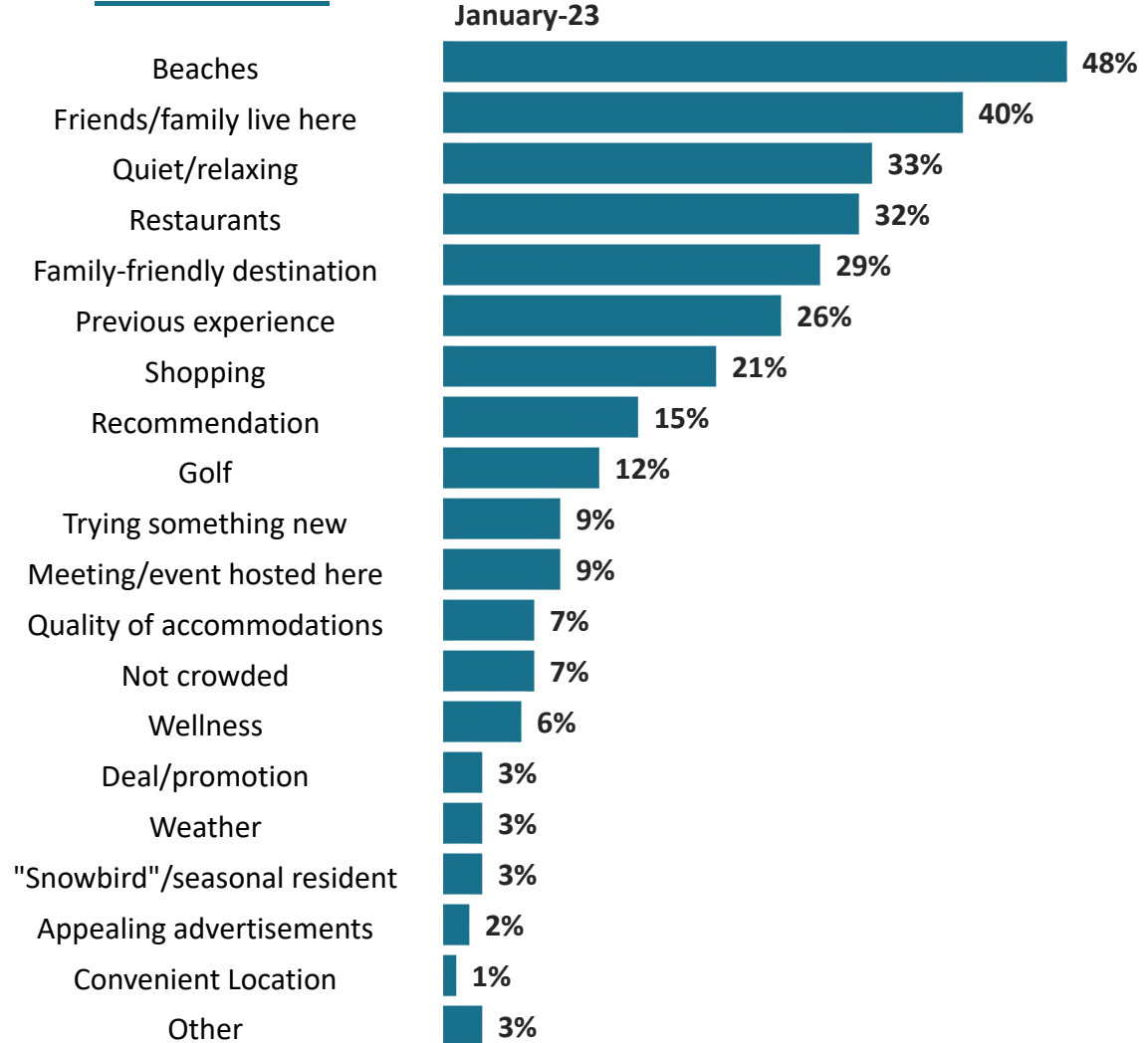
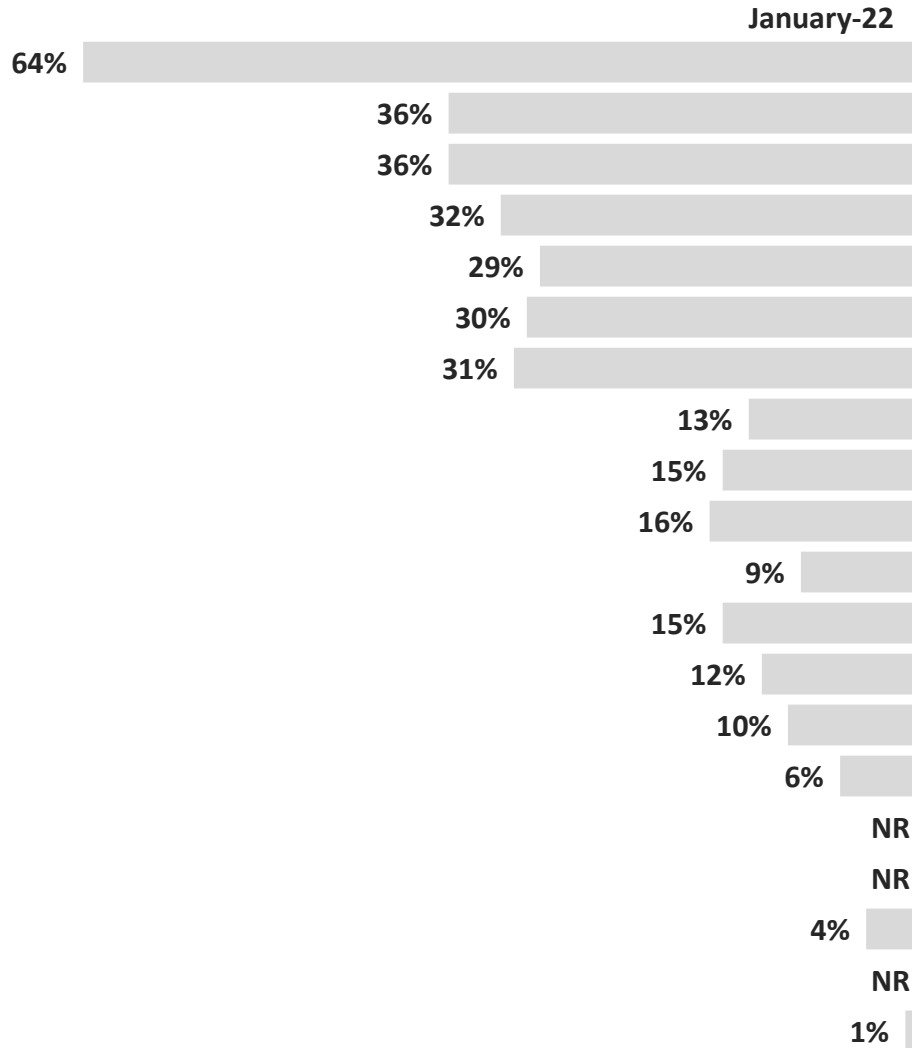


TRAVEL PARTY COMPOSITION



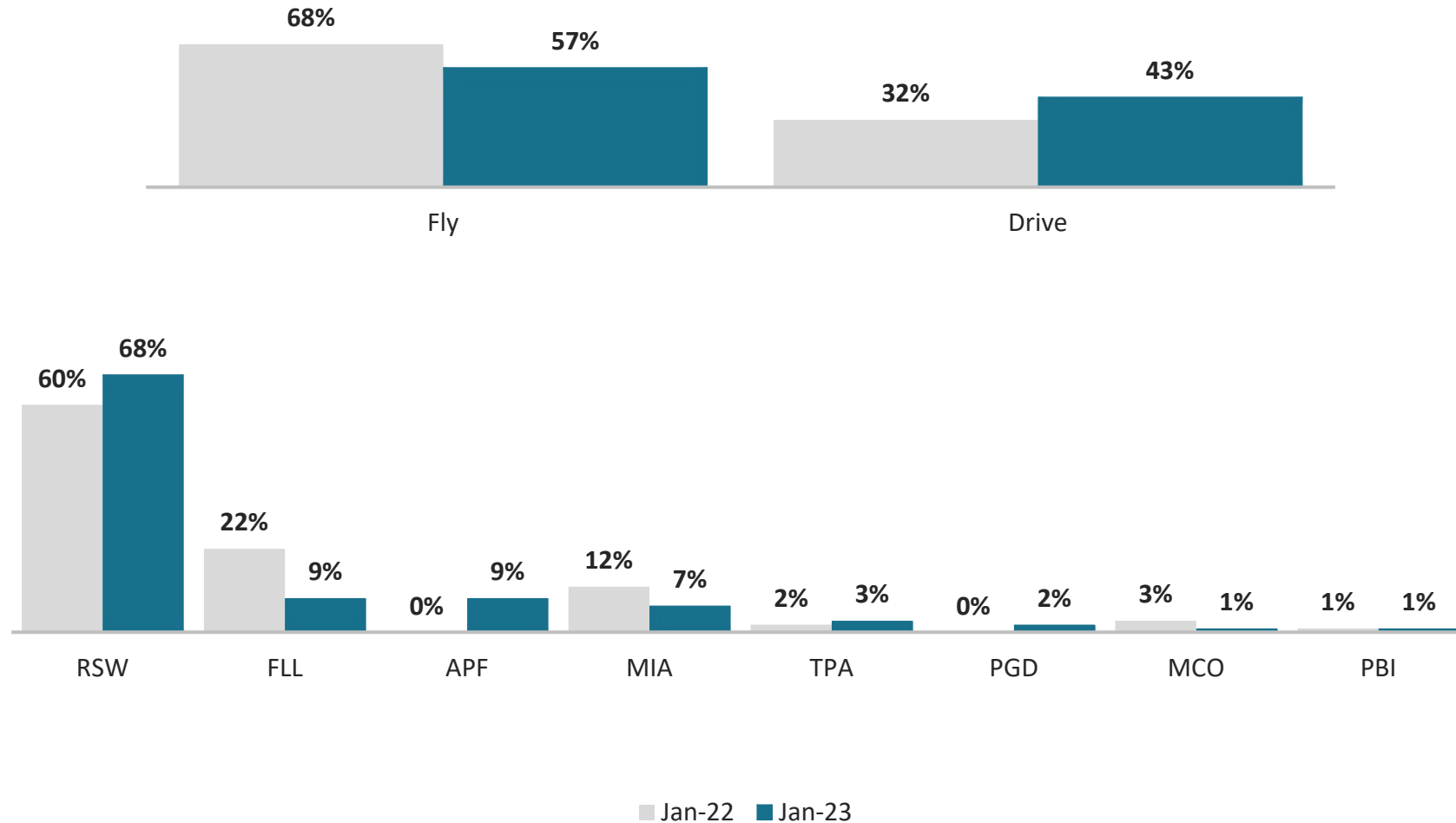
REASONS FOR CHOOSING AREA

Reasons¹

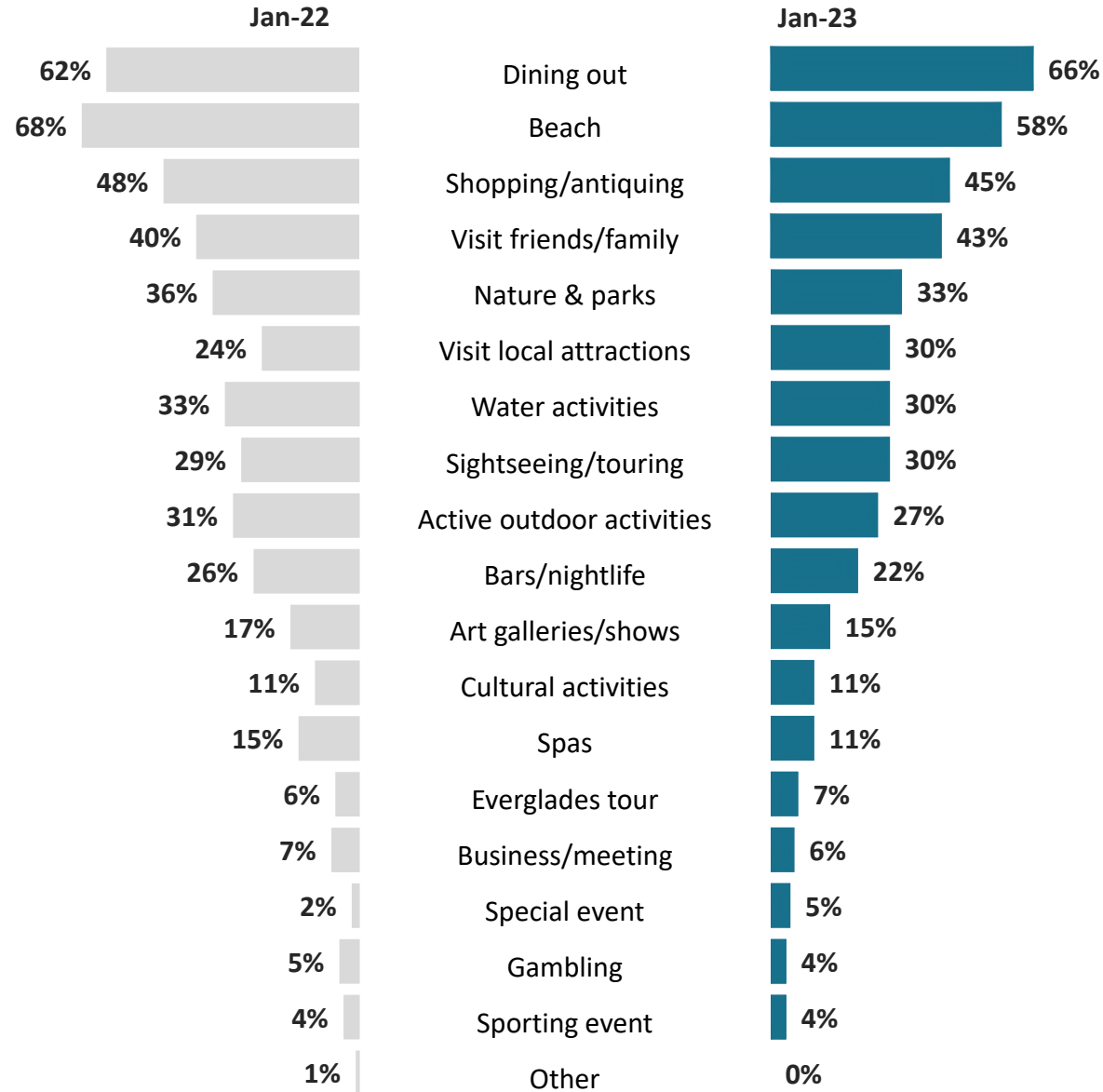


¹Multiple responses permitted.

TRANSPORTATION METHODS

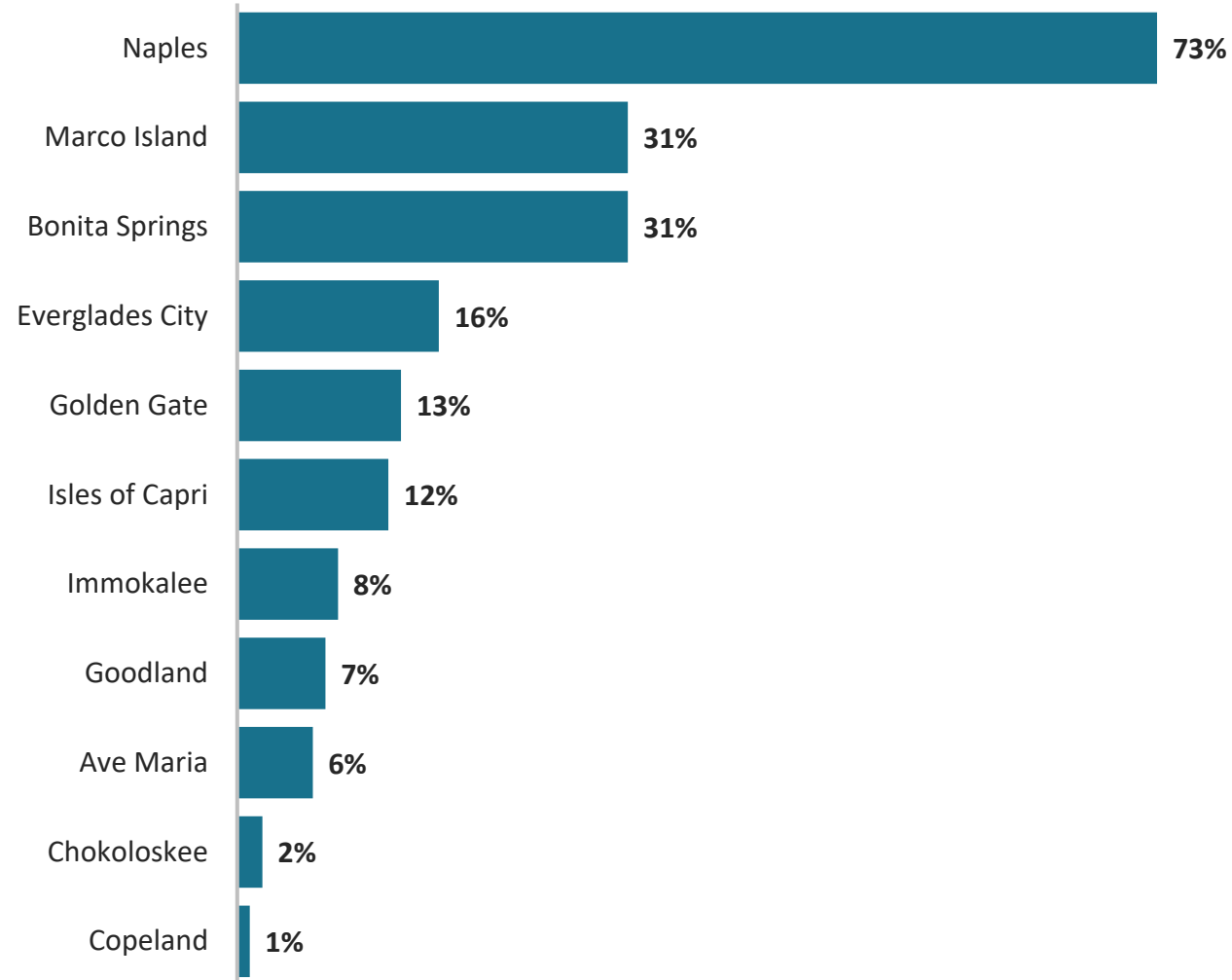


TRIP ACTIVITIES

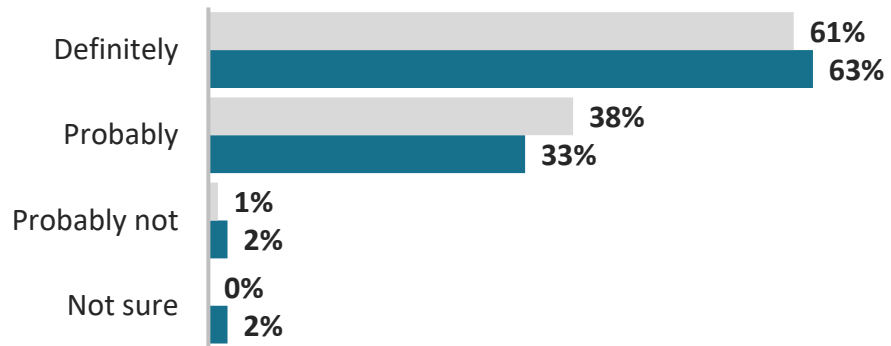


¹ Multiple responses permitted.

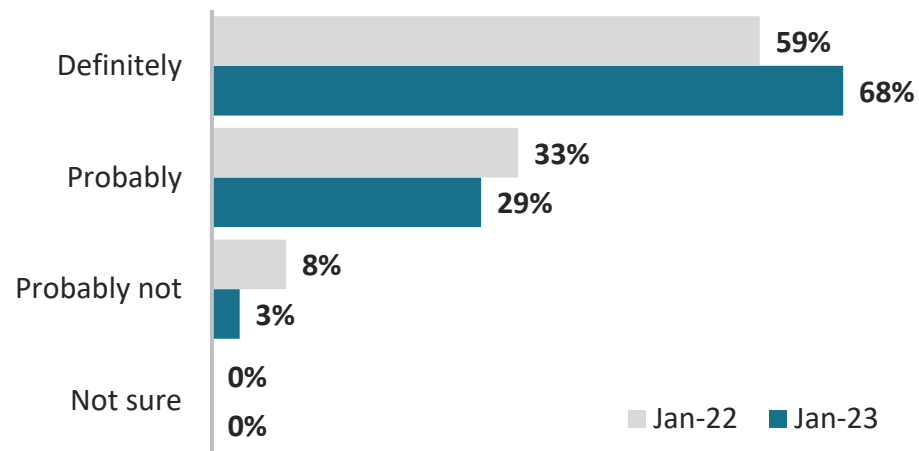
AREAS VISITED



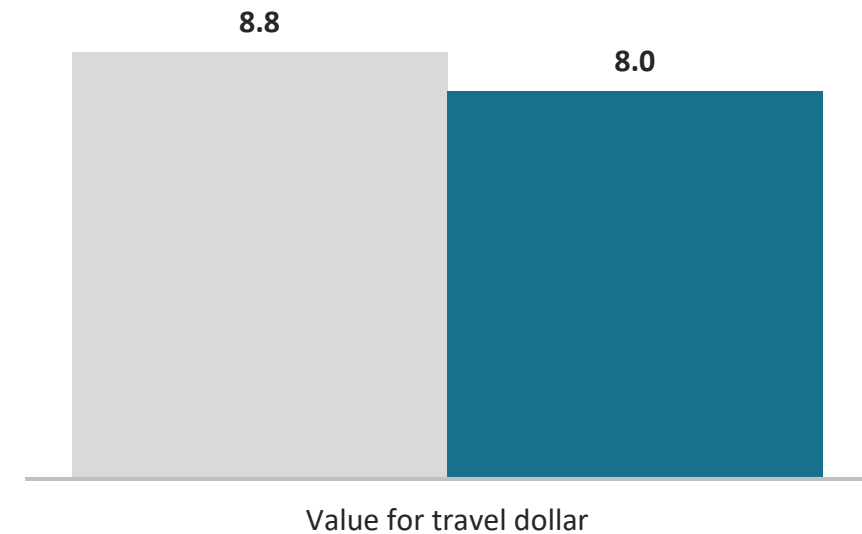
Will recommend the Naples area?



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.

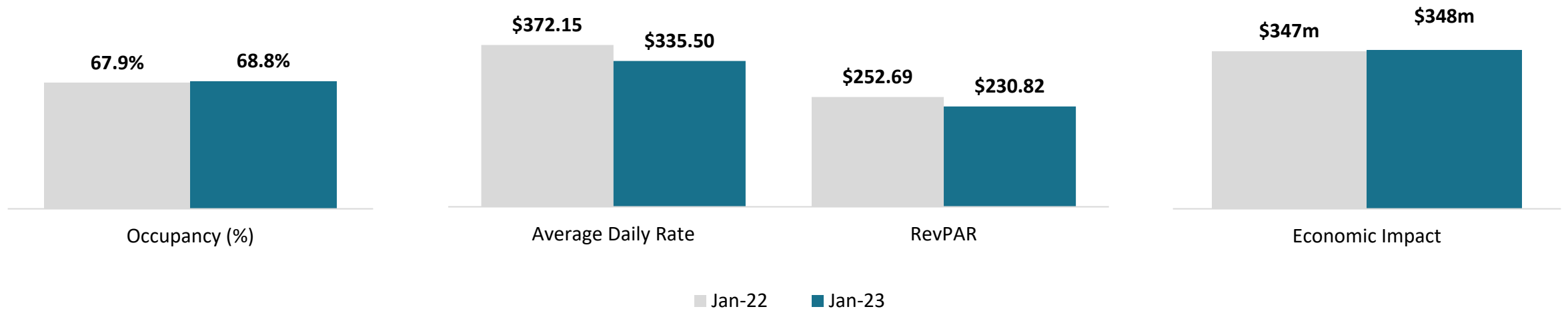
JANUARY 2023 METRICS



JANUARY 2023 OVERNIGHT VISITATION & LODGING

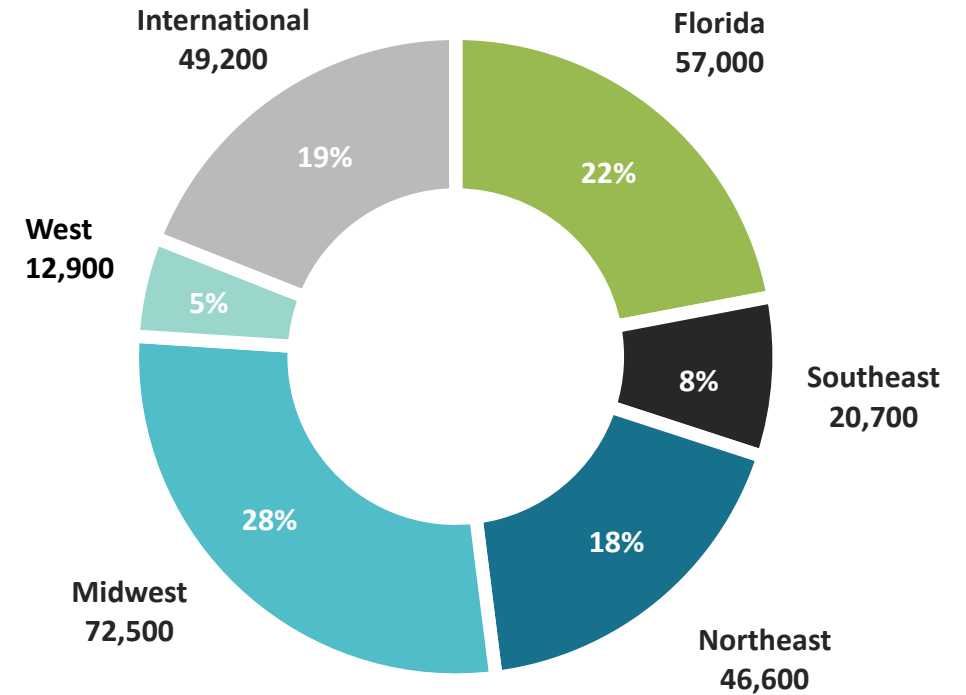
	January 2022	January 2023	% Change from 2022
Occupancy Rate	67.9%	68.8%	+ 1.3%
Average Daily Rate	\$372.15	\$335.50	- 9.8%
RevPAR	\$252.69	\$230.82	- 8.7%

	January 2022	January 2023	% Change from 2022
Visitors	226,000	258,900	+ 14.6%
Room Nights	225,900	228,200	+ 1.0%
Visitor Days	1,541,900	1,644,022	+ 6.6%
Direct Spending	\$232,426,300	\$233,623,600	+ 0.5%
Economic Impact	\$346,547,700	\$348,332,800	+ 0.5%



JANUARY 2023 VISITOR ORIGIN MARKETS

Region	January 2022		January 2023		Percent Change (Δ%)	
	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	38,400	17%	57,000	22%	+ 48%	+ 29%
Southeast	27,100	12%	20,700	8%	- 24%	- 33%
Northeast	54,200	24%	46,600	18%	- 14%	- 25%
Midwest	63,300	28%	72,500	28%	+ 15%	-
West	15,800	7%	12,900	5%	- 18%	- 29%
Canada	6,800	3%	18,100	7%	+ 166%	+ 133%
Europe	15,800	7%	23,300	9%	+ 47%	+ 29%
C/S America	2,300	1%	5,200	2%	+ 126%	+ 100%
Other	2,300	1%	2,600	1%	+ 13%	-
Total	226,000	100%	258,900	100%		



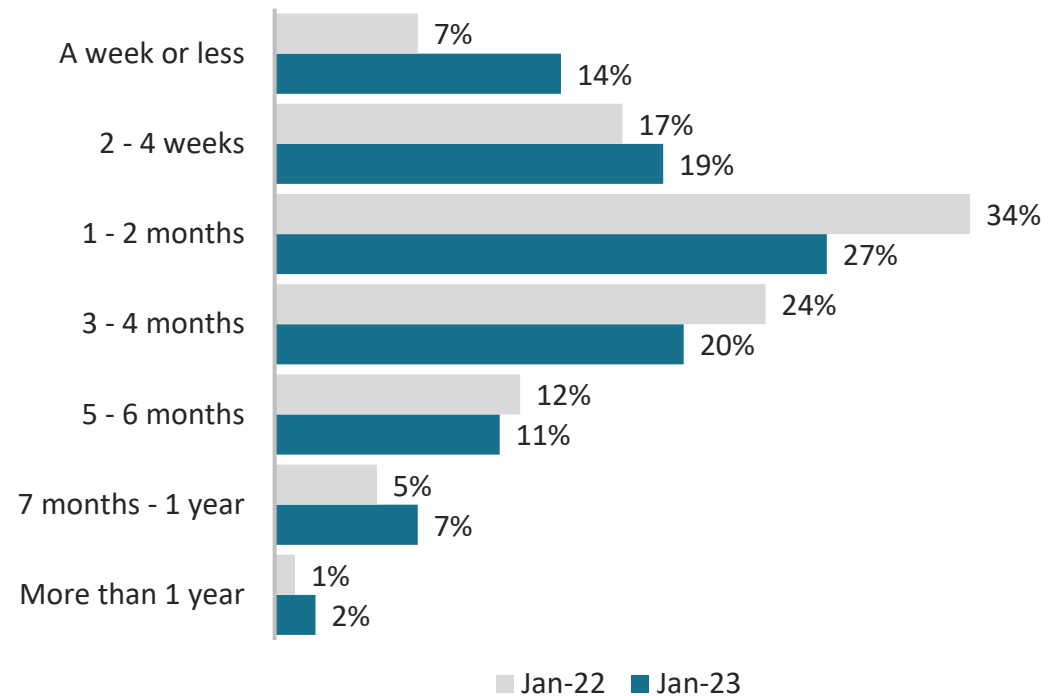
JANUARY 2023 VISITOR PROFILE



TRIP PLANNING CYCLE

Trip Planning Cycle		
	Jan-22	Jan-23
A week or less	7%	14%
2 - 4 weeks	17%	19%
1 - 2 months	34%	27%
3 - 4 months	24%	20%
5 - 6 months	12%	11%
7 months – 1 year	5%	7%
More than 1 year	1%	2%
Median (days)	53	49

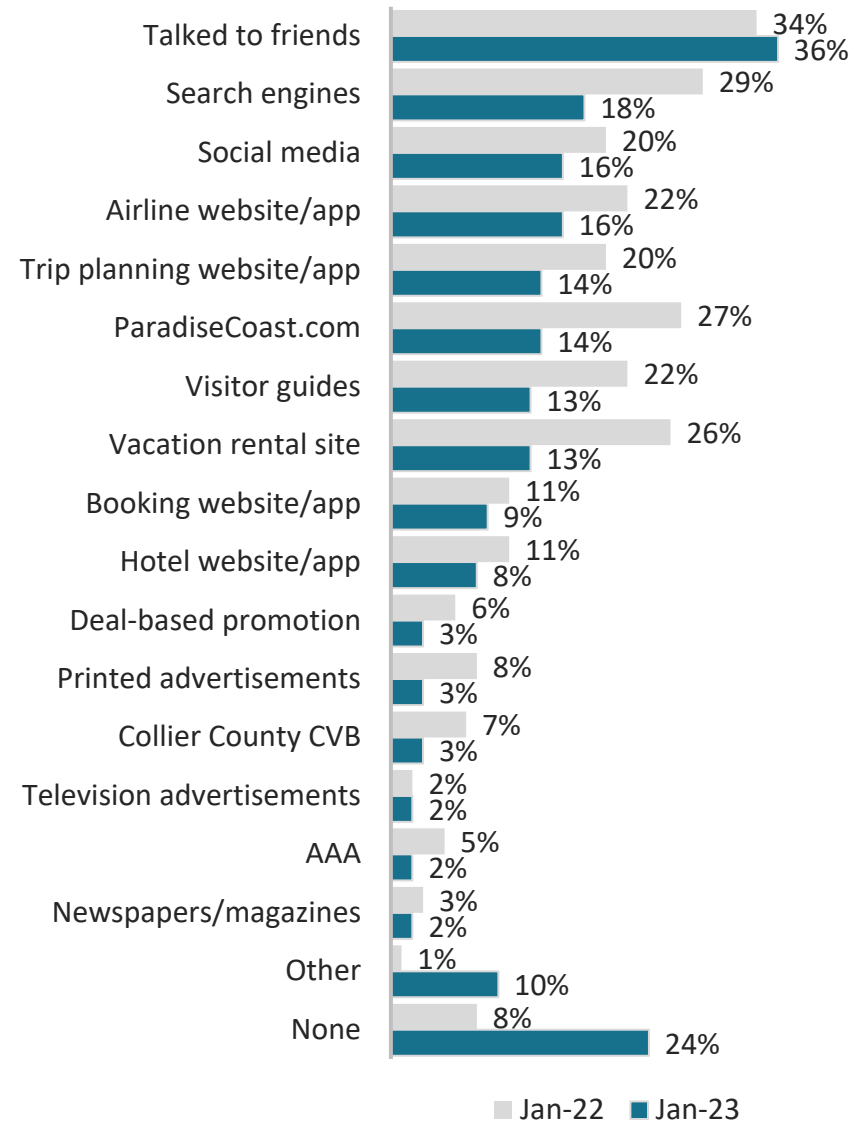
¹ Multiple responses permitted.



TRIP PLANNING RESOURCES

Top Trip Planning Resources ¹		
	Jan-22	Jan-23
Talked to friends	34%	36%
Search engines	29%	18%
Airline website/app	22%	16%
Social media	20%	16%
ParadiseCoast.com	27%	14%
Trip planning website/app	20%	14%
Vacation rental site	26%	13%
Visitor guides	22%	13%
Booking website/app	11%	9%
Hotel website/app	11%	8%
Collier County CVB	7%	3%
Printed advertisements	8%	3%
Deal-based promotion	6%	3%
Newspapers/magazines	3%	2%
AAA	5%	2%
Television advertisements	2%	2%
Other	1%	10%
None	8%	24%

¹ Multiple responses permitted.

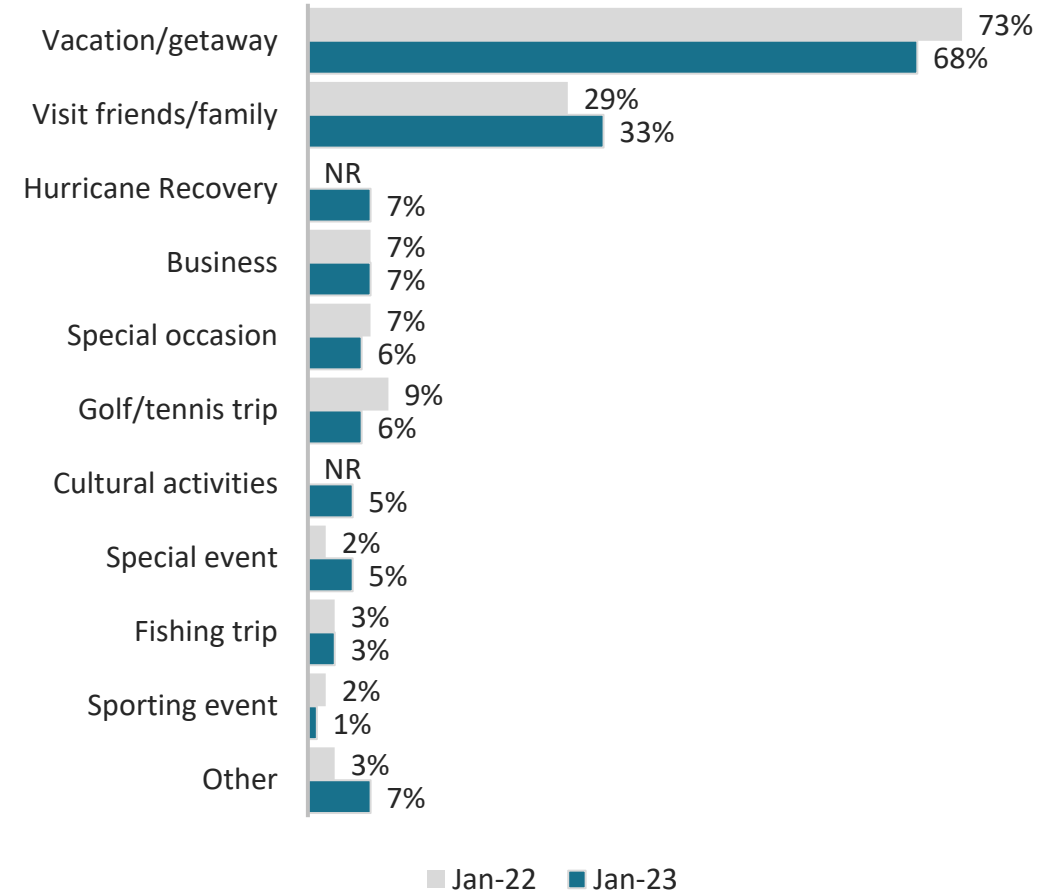


REASONS FOR VISITING

Top Reasons for Visiting¹

	Jan-22	Jan-23
Vacation/getaway	73%	68%
Visit friends/family	29%	33%
Business	7%	7%
Hurricane Recovery	-	7%
Golf/tennis trip	9%	6%
Special occasion	7%	6%
Special event	2%	5%
Cultural activities	-	5%
Fishing trip	3%	3%
Sporting event	2%	1%
Other	3%	7%

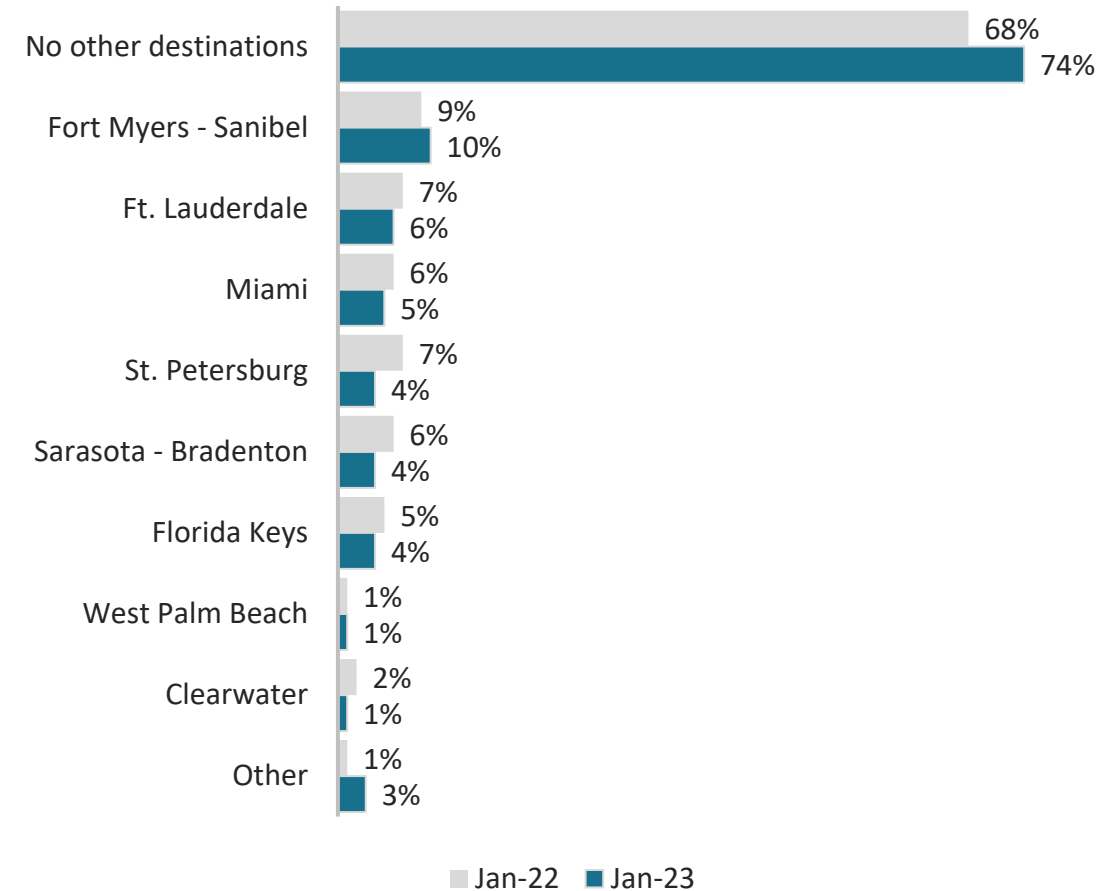
¹ Multiple responses permitted.



OTHER DESTINATIONS CONSIDERED

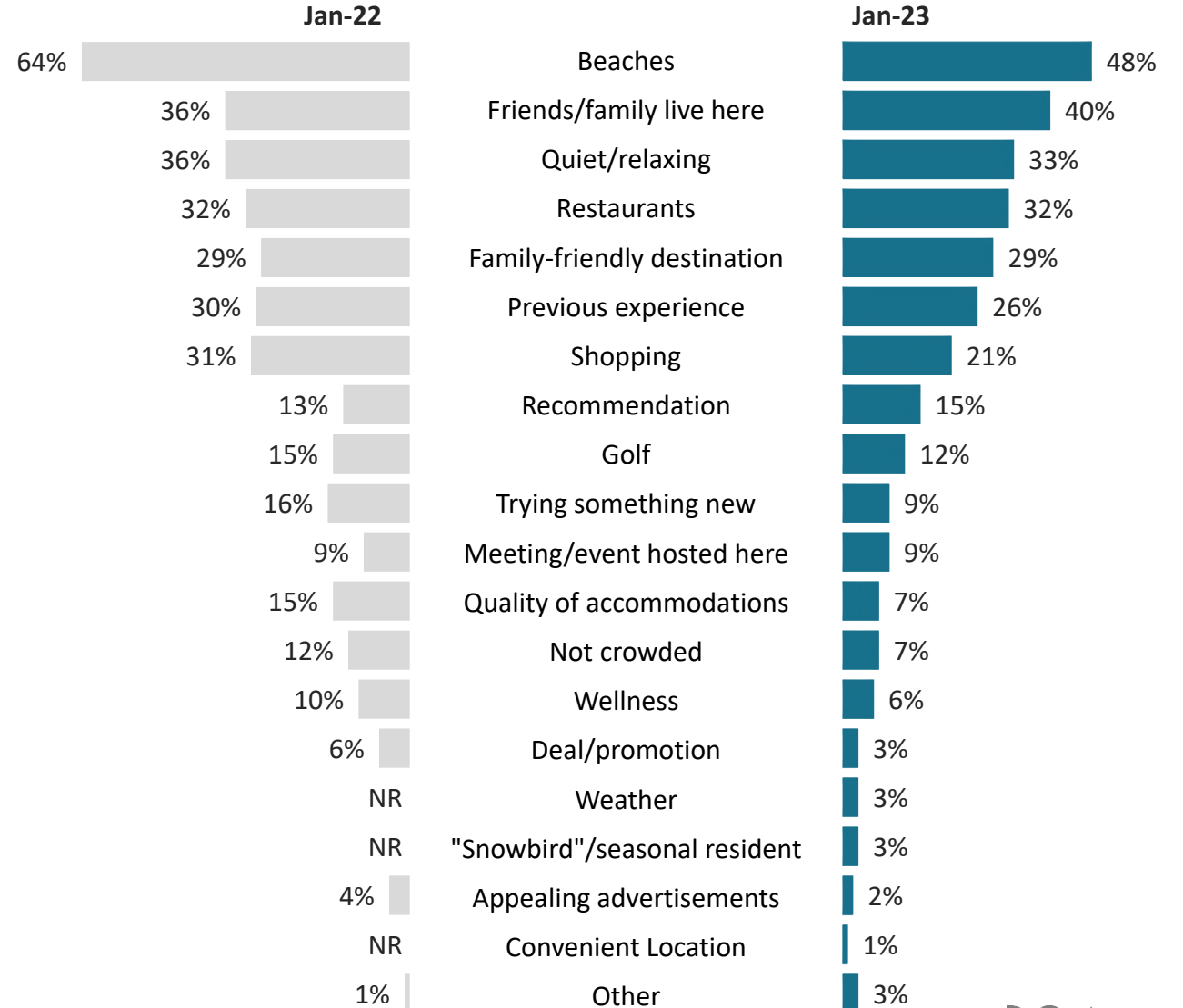
Other Destinations Considered ¹		
	Jan-22	Jan-23
No other destinations	68%	74%
Fort Myers - Sanibel	9%	10%
Ft. Lauderdale	7%	6%
Miami	6%	5%
Florida Keys	5%	4%
Sarasota - Bradenton	6%	4%
St. Petersburg	7%	4%
Clearwater	2%	1%
West Palm Beach	1%	1%
Other	1%	3%

¹ Multiple responses permitted.



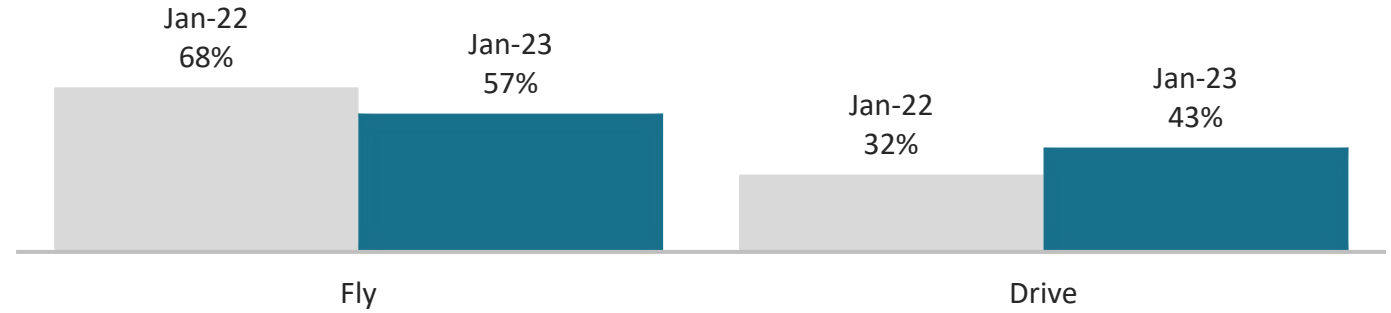
REASONS FOR CHOOSING AREA

Reasons for Choosing Area ¹		
	Jan-22	Jan-23
Beaches	64%	48%
Friends/family live here	36%	40%
Quiet/relaxing	36%	33%
Restaurants	32%	32%
Family-friendly destination	29%	29%
Previous experience	30%	26%
Shopping	31%	21%
Recommendation	13%	15%
Golf	15%	12%
Trying something new	16%	9%
Meeting/event hosted here	9%	9%
Quality of accommodations	15%	7%
Not crowded	12%	7%
Wellness	10%	6%
Deal/promotion	6%	3%
Weather	-	3%
"Snowbird"/seasonal resident	-	3%
Appealing advertisements	4%	2%
Convenient Location	-	1%
Other	1%	3%

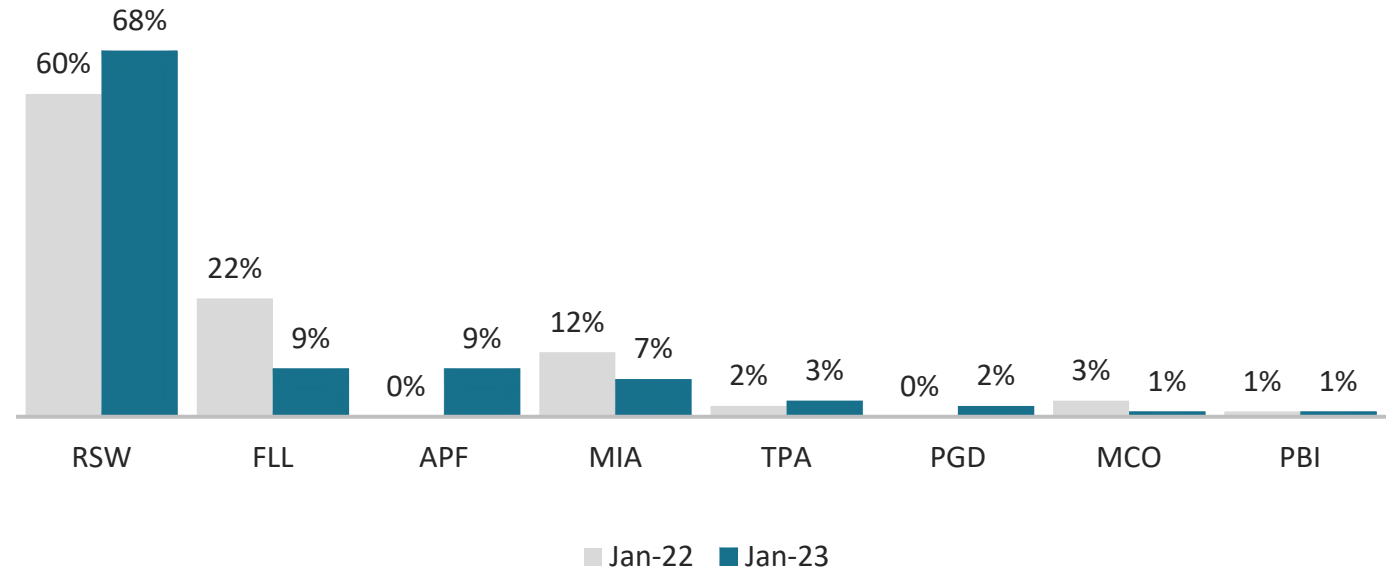


TRANSPORTATION METHODS

Mode of Transportation		
	Jan-22	Jan-23
Fly	68%	57%
Drive	32%	43%
Other	0%	0%



Airport Deplaned (Base: Fly)		
	Jan-22	Jan-23
SWFL Intl Airport (RSW)	60%	68%
Ft. Lauderdale Intl Airport (FLL)	22%	9%
Naples Airport (APF)	0%	9%
Miami Intl Airport (MIA)	12%	7%
Tampa Intl Airport (TPA)	2%	3%
Punta Gorda Airport (PGD)	0%	2%
Orlando Intl Airport (MCO)	3%	1%
Palm Beach Intl (PBI)	1%	1%



EXPOSURE TO ADVERTISING

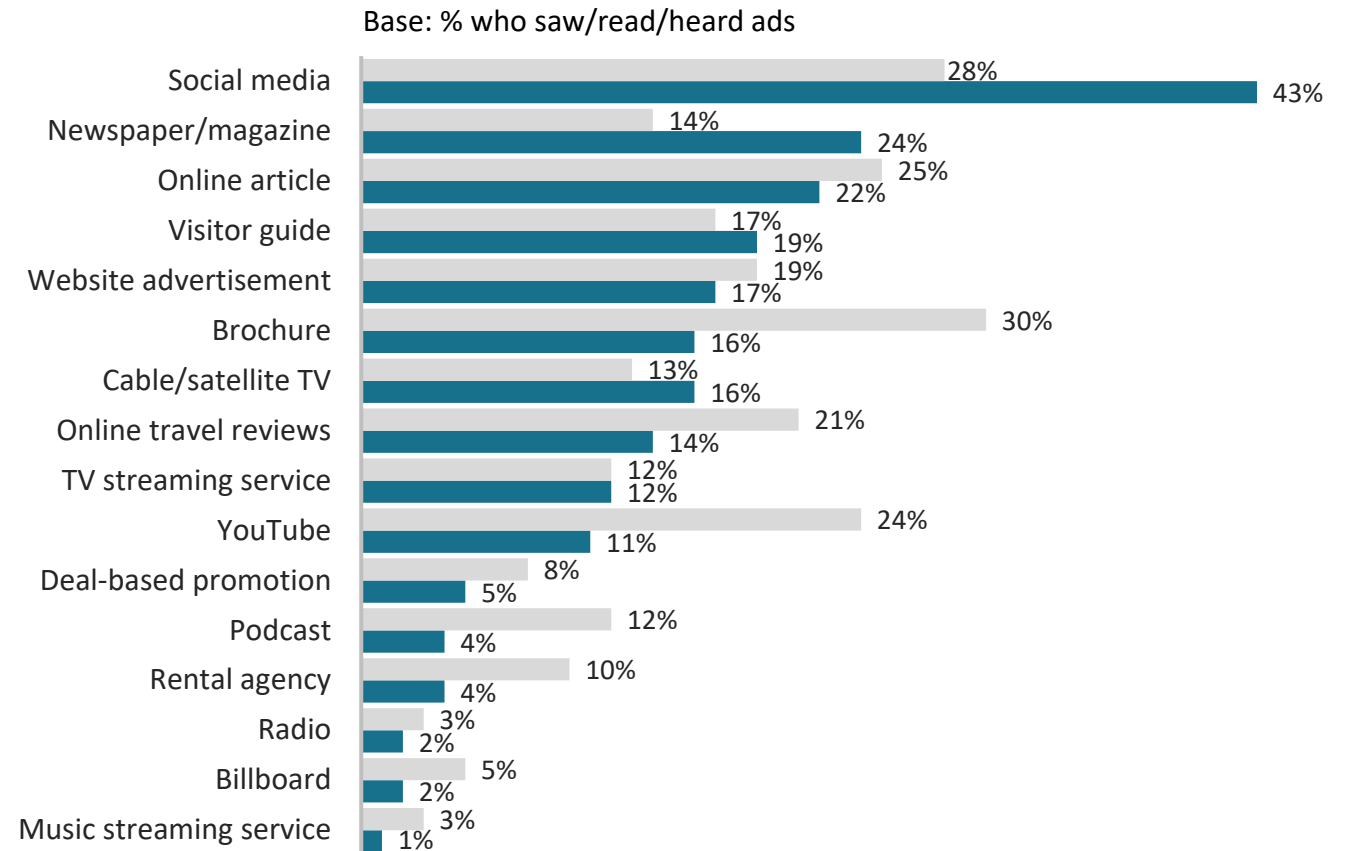
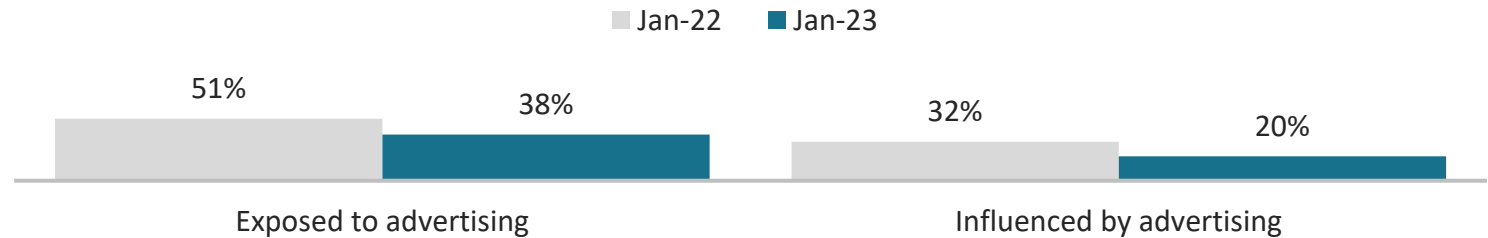
Advertising Exposure & Influence

	Jan-22	Jan-23
Exposed to advertising	51%	38%
Influenced by advertising	32%	20%

Top Advertising Sources Noticed¹

	Jan-22	Jan-23
Social media	28%	43%
Newspaper/magazine	14%	24%
Online article	25%	22%
Visitor guide	17%	19%
Website advertisement	19%	17%
Cable/satellite TV	13%	16%
Brochure	30%	16%
Online travel reviews	21%	14%
TV streaming service	12%	12%
YouTube	24%	11%
Deal-based promotion	8%	5%
Rental agency	10%	4%
Podcast	12%	4%
Billboard	5%	2%
Radio	3%	2%
Music streaming service	3%	1%
Other	0%	1%

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

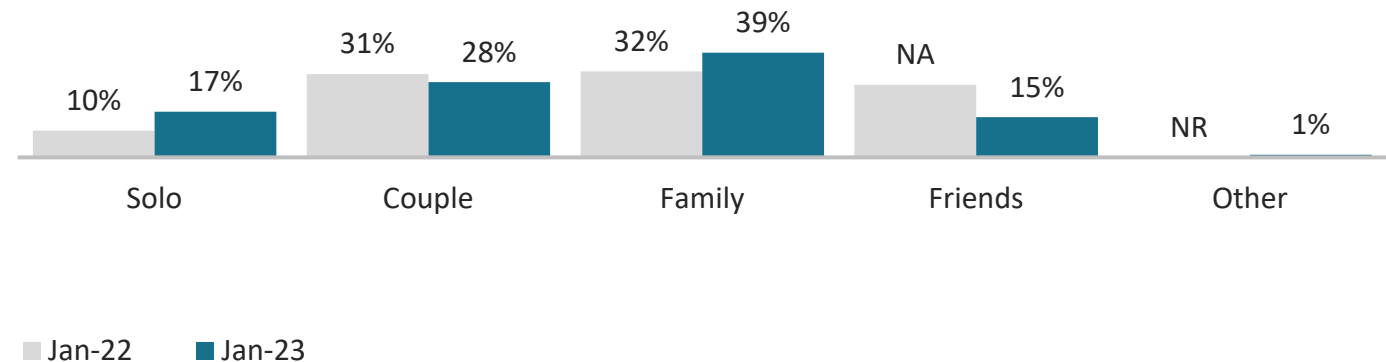


Average Visitors per Travel Party

	Jan-22	Jan-23
Average travel party size	3.0	3.1

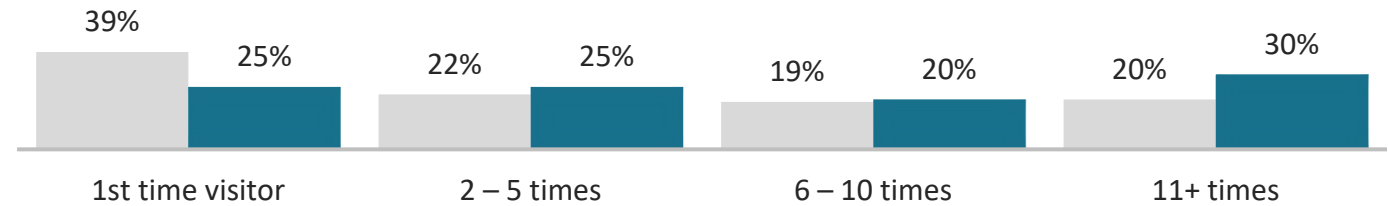
Travel Party Composition

	Jan-22	Jan-23
Solo	10%	17%
Couple	31%	28%
Family	32%	39%
Friends	27%	15%
Other	0%	1%

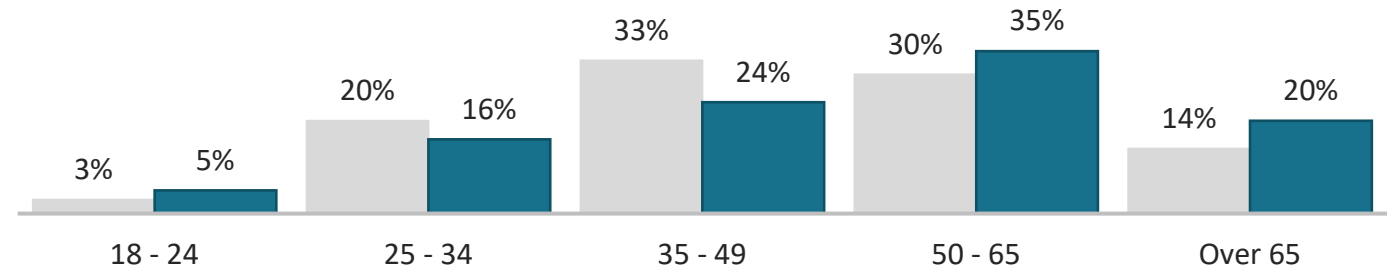


VISITING PARADISE COAST

Previous Visits		
	Jan-22	Jan-23
1 st time visitor	39%	25%
2 – 5 times	22%	25%
6 – 10 times	19%	20%
11+ times	20%	30%



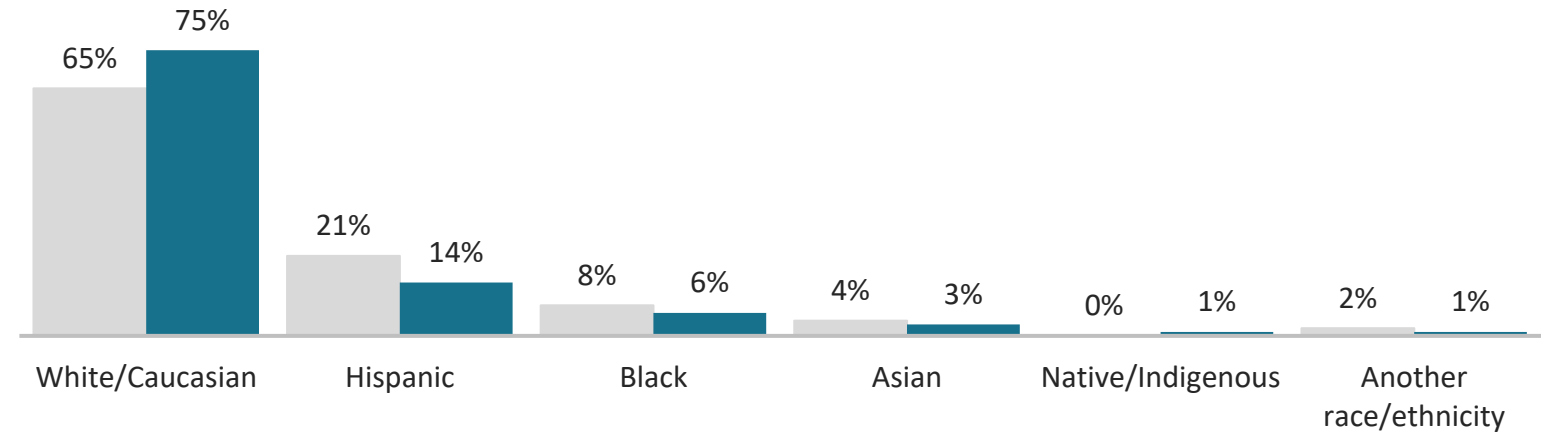
Typical Visitor Ages		
	Jan-22	Jan-23
Median Age	47	52



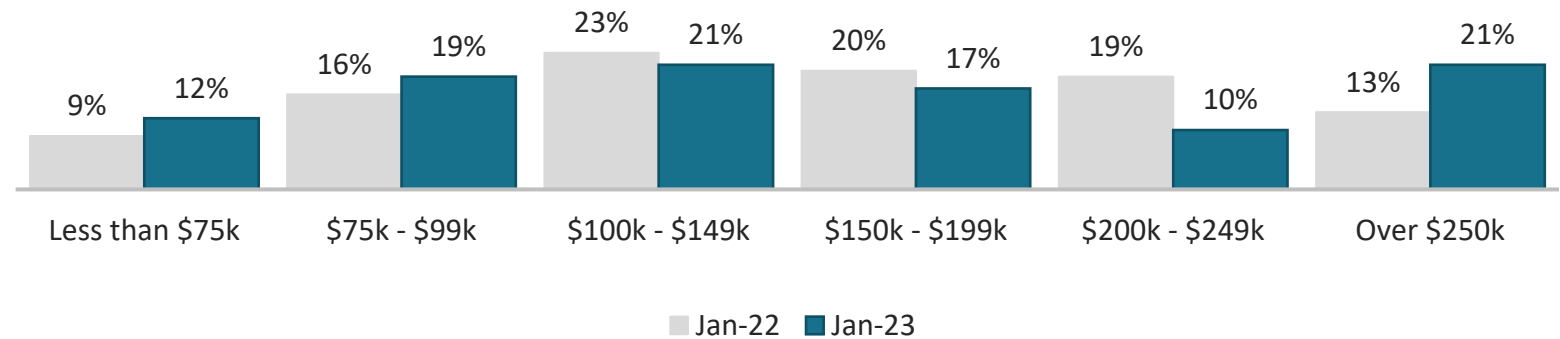
■ Jan-22 ■ Jan-23

VISITOR DEMOGRAPHICS

Race/Ethnicity		
	Jan-22	Jan-23
White/Caucasian	65%	75%
Hispanic	21%	14%
Black/African-American	8%	6%
Asian	4%	3%
Native/Indigenous	0%	1%
Another race/ethnicity	2%	1%



Typical Visitor Household Income		
	Jan-22	Jan-23
Median HHI	\$155,000	\$145,900



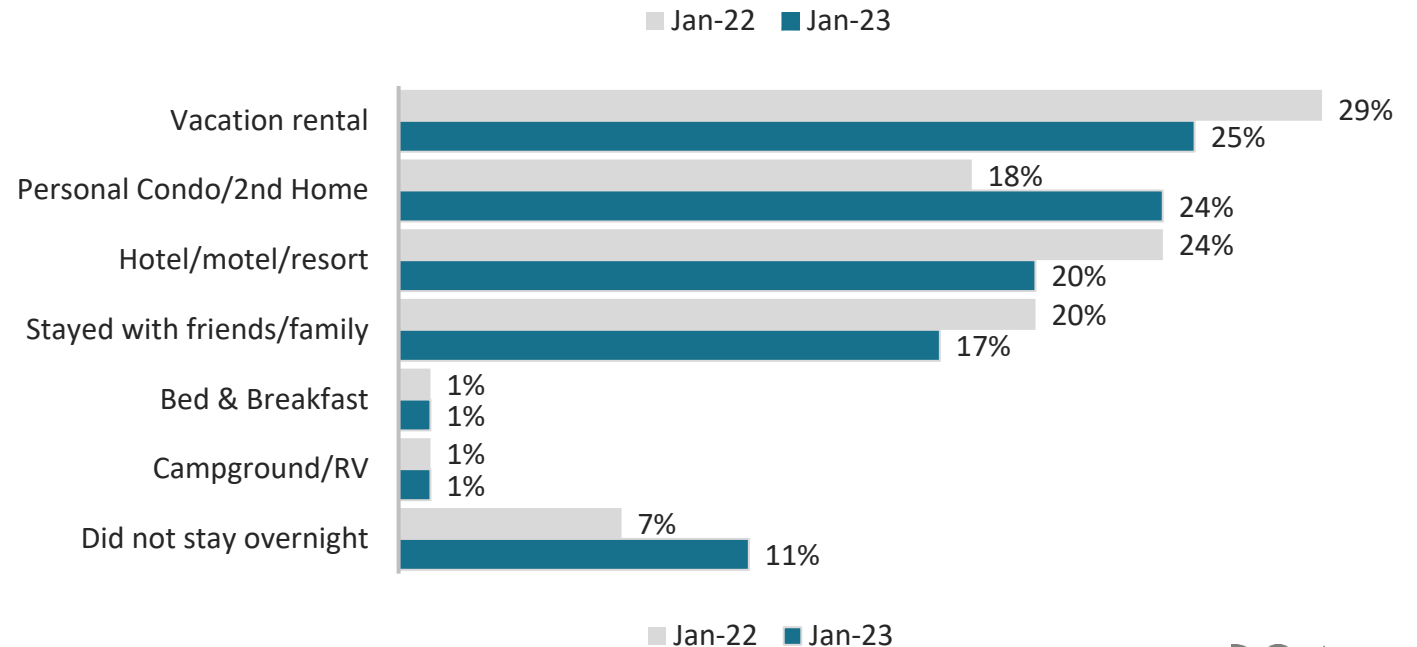
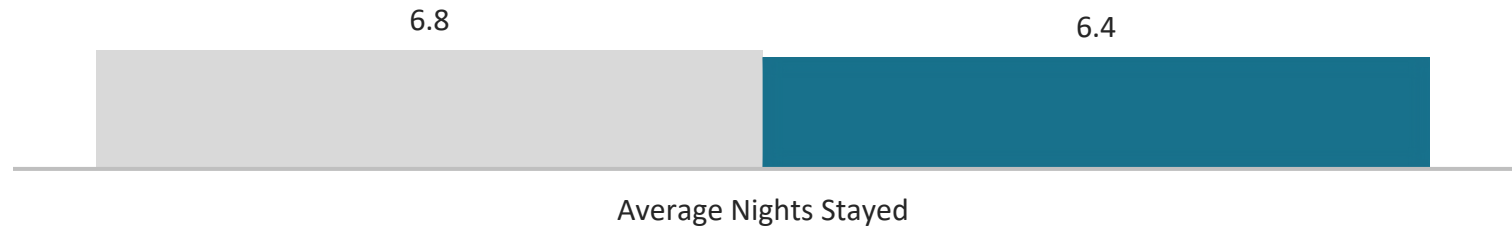
OVERNIGHT VISITS

Nights in Destination

	Jan-22	Jan-23
Nights Stayed (mean)	6.8	6.4

Accommodations

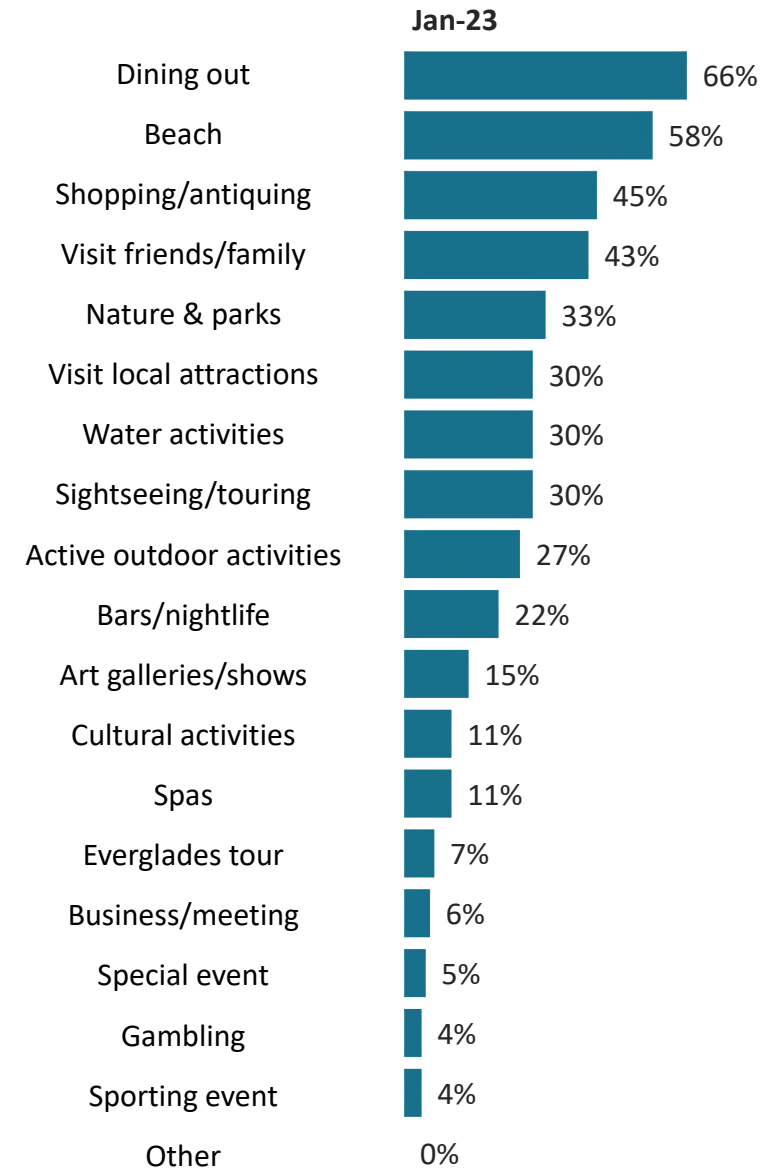
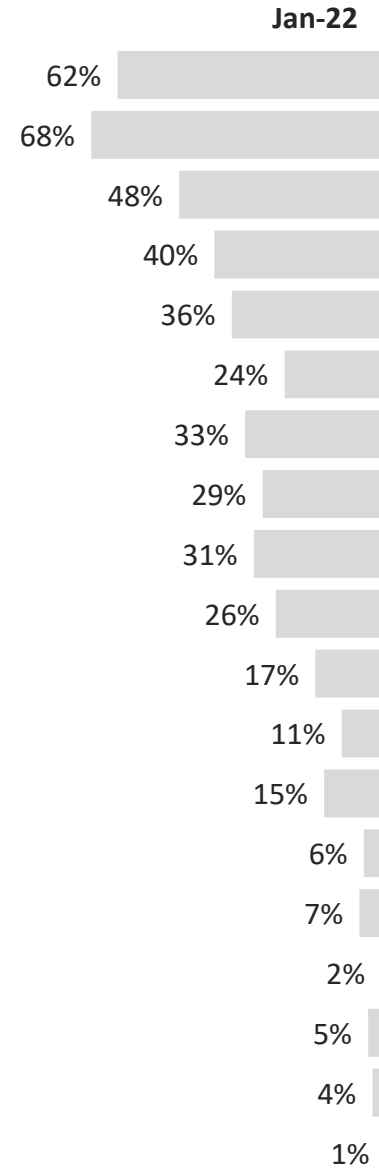
	Jan-22	Jan-23
Vacation rental	29%	25%
Personal condo/2 nd home	18%	24%
Hotel/motel/resort	24%	20%
Stayed with friends/family	20%	17%
Bed & Breakfast	1%	1%
Campground/RV	1%	1%
Did not stay overnight	7%	11%



TRIP ACTIVITIES

Trip Activities ¹		
	Jan-22	Jan-23
Dining out	62%	66%
Beach	68%	58%
Shopping/antiquing	48%	45%
Visit friends/family	40%	43%
Nature & parks	36%	33%
Visit local attractions	24%	30%
Water activities	33%	30%
Sightseeing/touring	29%	30%
Active outdoor activities	31%	27%
Bars/nightlife	26%	22%
Art galleries/shows	17%	15%
Cultural activities	11%	11%
Spas	15%	11%
Everglades tour	6%	7%
Business/meeting	7%	6%
Special event	2%	5%
Gambling	5%	4%
Sporting event	4%	4%
Other	1%	0%

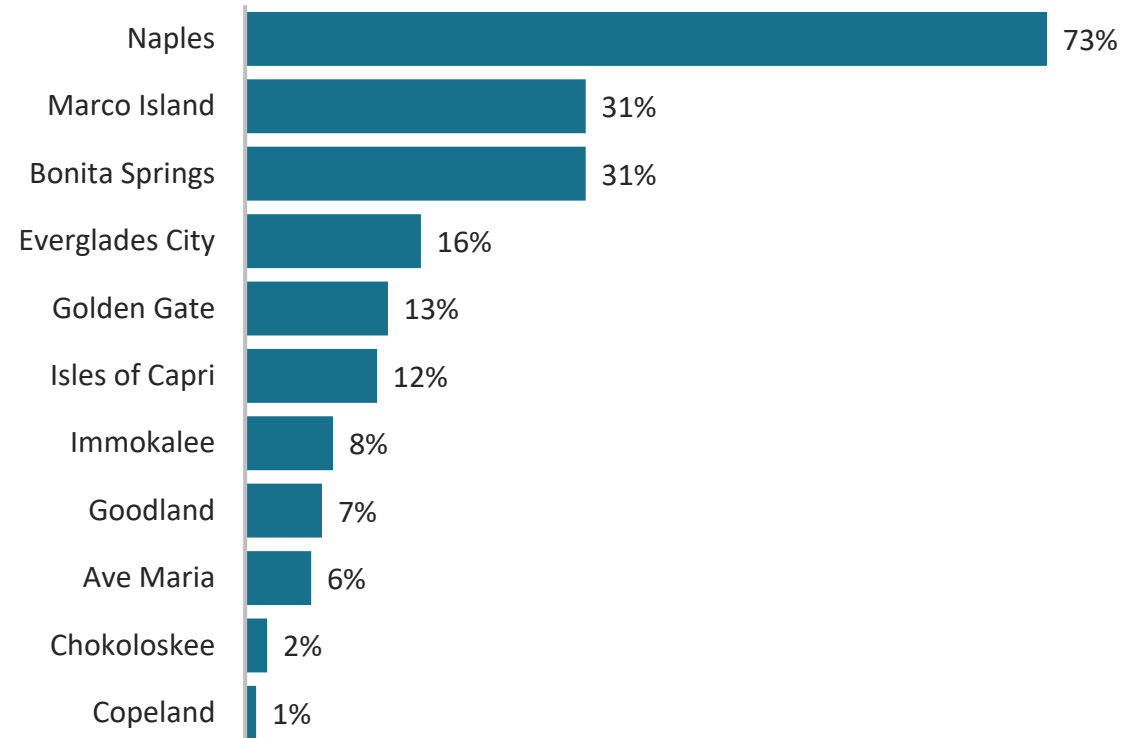
¹ Multiple responses permitted.



AREAS VISITED

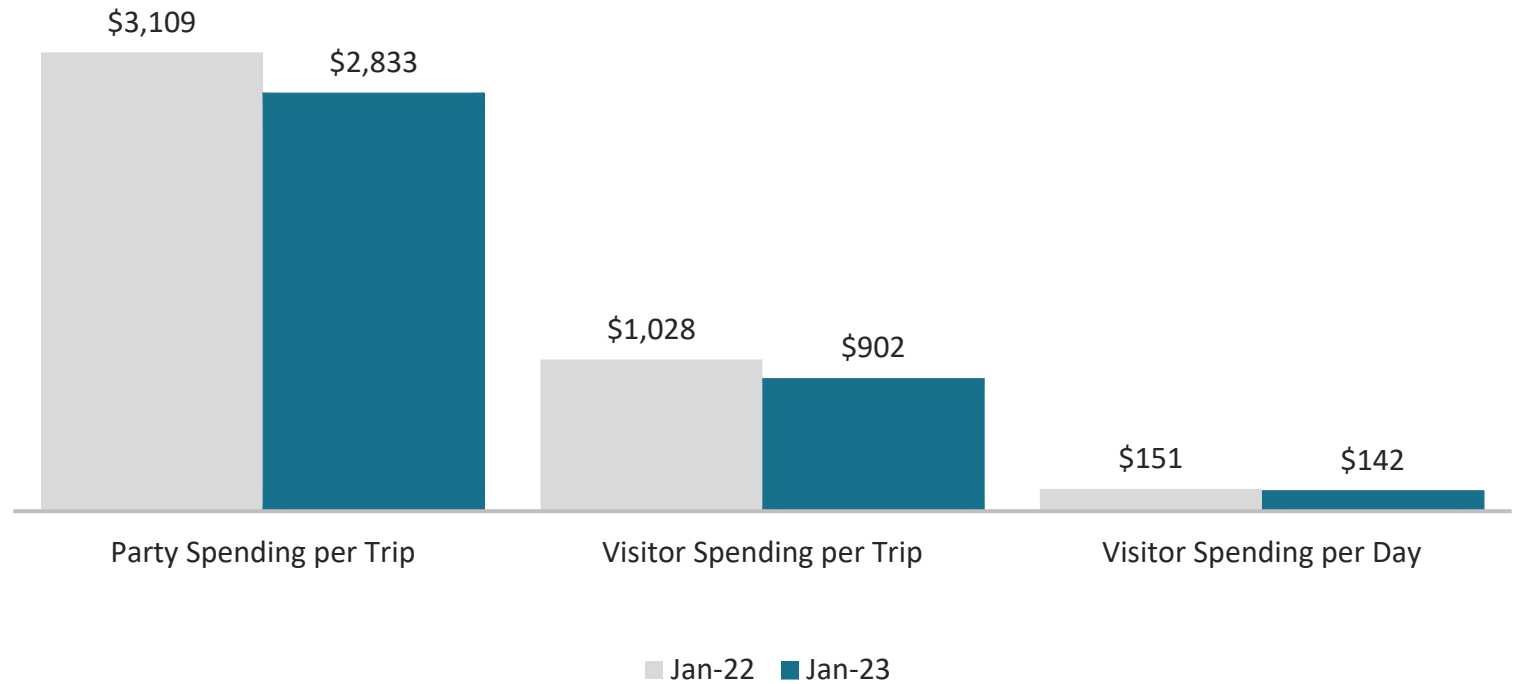
Areas Visited in Destination ¹		
	Jan-22	Jan-23
Naples	-	73%
Bonita Springs	-	31%
Marco Island	-	31%
Everglades City	-	16%
Golden Gate	-	13%
Isles of Capri	-	12%
Immokalee	-	8%
Goodland	-	7%
Ave Maria	-	6%
Chokoloskee	-	2%
Copeland	-	1%
Not sure	-	10%

¹ Multiple responses permitted.



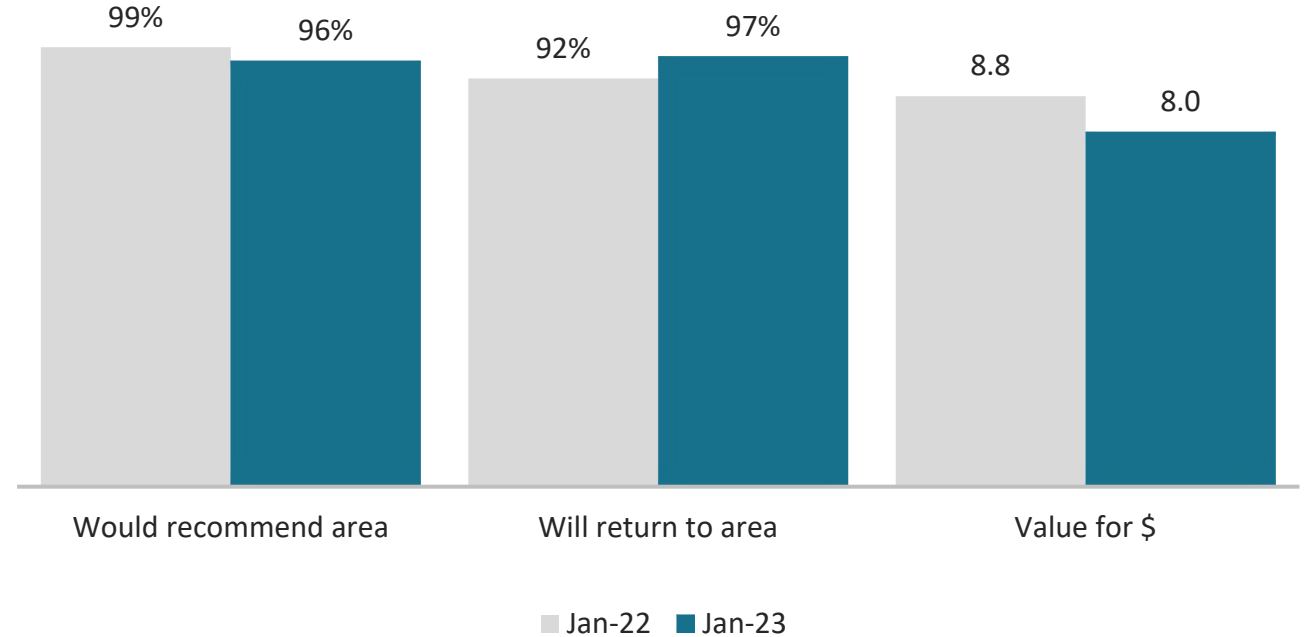
VISITOR SPENDING

Visitor Spending		
	Jan-22	Jan-23
Party Spending per Trip	\$3,109	\$2,833
Visitor Spending per Trip	\$1,028	\$902
Visitor Spending per Day	\$151	\$142



Satisfaction with Destination		
	Jan-22	Jan-23
Value for travel dollar ¹	8.8	8.0
Would recommend area	99%	96%
Will return to area	92%	97%

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



DESTINATION COMPARISONS



OCCUPANCY COMPARISONS

	Occupancy Rate (%)				Δ% from January 2019				Δ% from January 2022			
	Trans	Group	Cont	Total	Trans	Group	Cont	Total	Trans	Group	Cont	Total
Naples	50.8%	23.3%	0.3%	74.4%	46.0%	-32.1%	131.5%	7.4%	2.7%	18.9%	299.3%	7.6%
Miami	56.2%	14.9%	4.5%	75.5%	4.2%	-24.9%	1.2%	-3.4%	4.2%	48.2%	-7.7%	9.8%
Florida Keys	66.7%	13.8%	0.2%	80.7%	7.7%	9.6%	-52.0%	7.7%	-0.5%	6.5%	-53.8%	0.3%
Fort Myers	55.2%	20.6%	3.7%	79.6%	-1.0%	8.8%	57.4%	3.2%	-7.0%	50.8%	-22.9%	2.2%
Sarasota	57.2%	16.9%	0.9%	75.0%	22.0%	-20.1%	34.0%	9.2%	0.7%	28.8%	-41.9%	4.9%
Clearwater	48.8%	23.5%	0.0%	72.3%	14.1%	-6.9%	0.0%	6.3%	-2.3%	58.5%	0.0%	11.6%
St. Petersburg	46.8%	21.1%	0.8%	68.7%	10.7%	-15.4%	6.7%	1.1%	-2.6%	81.1%	-39.2%	12.6%
Palm Beach	52.9%	18.9%	1.6%	73.4%	3.6%	-18.1%	2.6%	-3.1%	3.4%	52.0%	-13.7%	12.1%
Ft. Lauderdale	56.2%	15.8%	3.2%	75.2%	3.5%	-16.6%	-11.9%	-2.2%	1.5%	80.6%	8.7%	12.2%

¹Metrics provided by STR.

ROOM RATE COMPARISONS

	Average Daily Rate (\$)				Δ% from January 2019				Δ% from January 2022			
	Trans	Group	Cont	Total	Trans	Group	Cont	Total	Trans	Group	Cont	Total
Naples	\$316.44	\$300.13	\$191.95	\$310.87	8.3%	18.4%	18.7%	14.0%	-10.1%	22.3%	20.5%	-3.3%
Miami	\$260.22	\$267.43	\$114.34	\$253.01	18.2%	19.5%	10.2%	17.9%	-2.2%	9.5%	2.3%	0.4%
Florida Keys	\$378.69	\$375.35	\$349.77	\$378.03	39.3%	39.0%	96.6%	39.5%	-13.0%	7.0%	18.1%	-10.1%
Fort Myers	\$211.36	\$213.97	\$138.98	\$208.66	39.6%	38.6%	52.0%	38.8%	8.9%	21.7%	14.6%	12.0%
Sarasota	\$207.99	\$183.99	\$131.69	\$201.66	60.5%	39.2%	101.6%	55.4%	12.4%	21.7%	84.0%	14.4%
Clearwater	\$175.25	\$174.56	\$0.00	\$175.02	31.3%	28.3%	0.0%	30.2%	7.2%	22.5%	0.0%	10.3%
St. Petersburg	\$180.56	\$157.68	\$82.98	\$172.44	35.7%	16.6%	7.2%	29.4%	10.0%	14.5%	-6.0%	9.5%
Palm Beach	\$311.18	\$293.10	\$123.36	\$302.46	36.2%	31.3%	20.7%	34.9%	5.6%	16.3%	12.5%	7.5%
Ft. Lauderdale	\$211.07	\$243.71	\$147.51	\$215.26	24.3%	16.9%	8.7%	21.1%	10.5%	21.3%	25.5%	13.9%

¹Metrics provided by STR.

ROOM REVENUE COMPARISONS

	Revenue per Available Room (\$)				Δ% from January 2019				Δ% from January 2022			
	Trans	Group	Cont	Total	Trans	Group	Cont	Total	Trans	Group	Cont	Total
Naples	\$160.79	\$70.07	\$0.52	\$231.39	58.2%	-19.6%	174.6%	22.5%	-7.7%	45.5%	381.3%	4.0%
Miami	\$146.12	\$39.84	\$5.11	\$191.07	23.2%	-10.3%	11.6%	14.0%	1.9%	62.2%	-5.6%	10.2%
Florida Keys	\$252.47	\$51.96	\$0.83	\$305.25	50.1%	52.4%	-5.7%	50.2%	-13.4%	13.9%	-45.4%	-9.8%
Fort Myers	\$116.71	\$44.18	\$5.17	\$166.06	38.2%	50.8%	139.3%	43.3%	1.3%	83.5%	-11.7%	14.4%
Sarasota	\$119.01	\$31.01	\$1.20	\$151.23	95.7%	11.2%	170.1%	69.7%	13.3%	56.7%	6.9%	20.0%
Clearwater	\$85.58	\$40.97	\$0.00	\$126.55	49.8%	19.4%	0.0%	38.4%	4.7%	94.2%	0.0%	23.0%
St. Petersburg	\$84.53	\$33.24	\$0.64	\$118.41	50.2%	-1.4%	14.4%	30.8%	7.2%	107.4%	-42.9%	23.3%
Palm Beach	\$164.74	\$55.28	\$1.96	\$221.98	41.1%	7.5%	23.8%	30.7%	9.1%	76.8%	-2.9%	20.5%
Ft. Lauderdale	\$118.62	\$38.56	\$4.68	\$161.86	28.8%	-2.5%	-4.2%	18.5%	12.2%	119.0%	36.5%	27.7%

¹Metrics provided by STR.

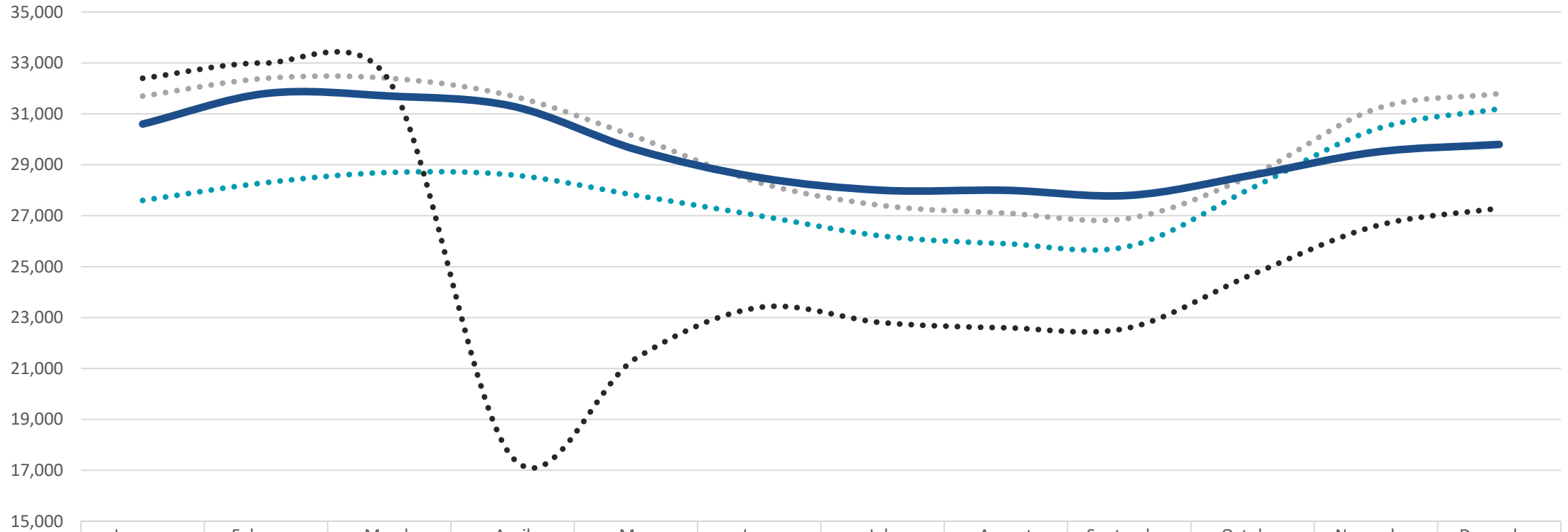
INDUSTRY DATA



LEISURE & HOSPITALTY EMPLOYMENT

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

Monthly Direct Leisure & Hospitality Employment



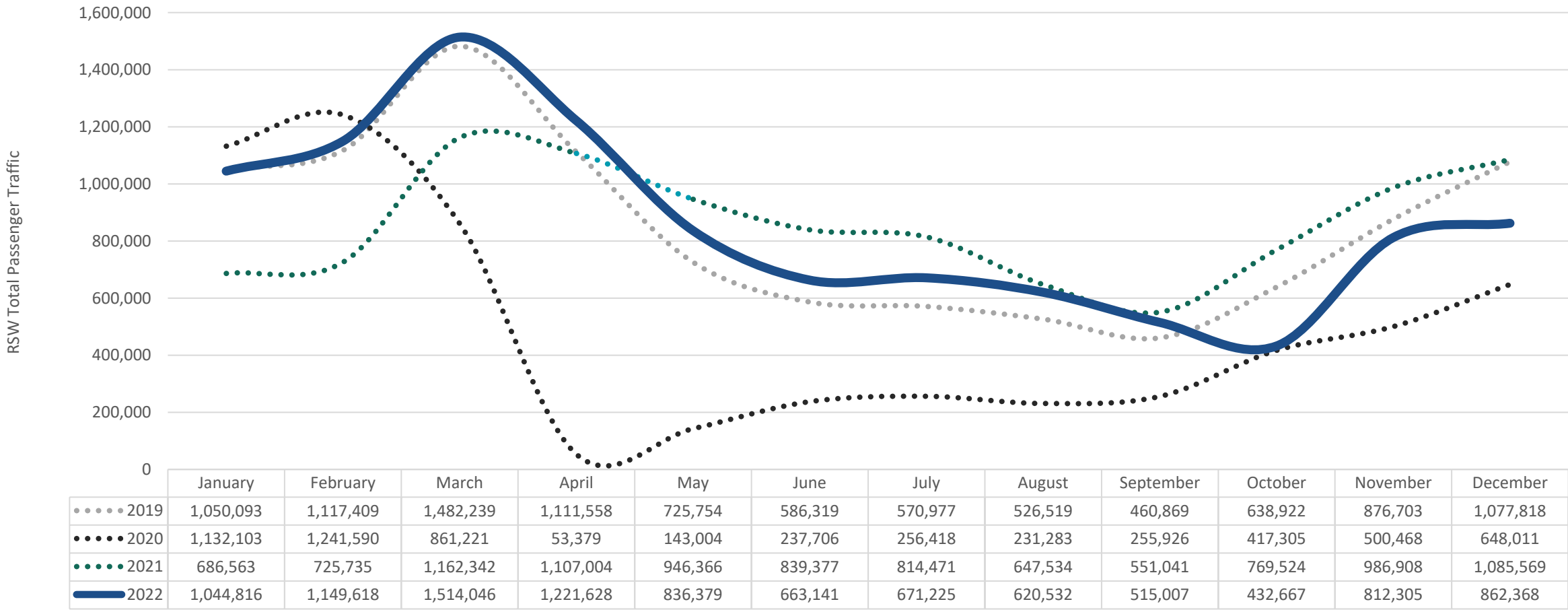
	January	February	March	April	May	June	July	August	September	October	November	December
••••• 2019	31,700	32,400	32,400	31,700	30,100	28,300	27,400	27,100	26,900	28,600	31,200	31,800
••••• 2020	32,400	33,000	32,300	17,500	21,400	23,400	22,800	22,600	22,600	24,700	26,600	27,300
••••• 2021	27,600	28,300	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	29,500	29,800 (P)

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 Traffic



¹ SOURCE: Lee County Port Authority Monthly Statistics.

LICENSED TRANSIENT RENTAL UNITS

January 2023 Licensed Transient Rental Units ¹				
	Hotel	Motel	Vacation Rental	Total
Naples	4,452	1,557	3,372	9,381
Marco Island	1,275	115	1,845	3,235
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	5,408	13,124²

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
January 2023 Monthly Dashboard

Paul Beirnes, Executive Director
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