

# NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau  
July - Sept 2023 Quarterly Report



# STUDY OBJECTIVES: VISITOR JOURNEY

This report is organized along the visitor's journey, from planning stages to the impact of tourism.  
Because of its importance, the impact of tourism is covered first.

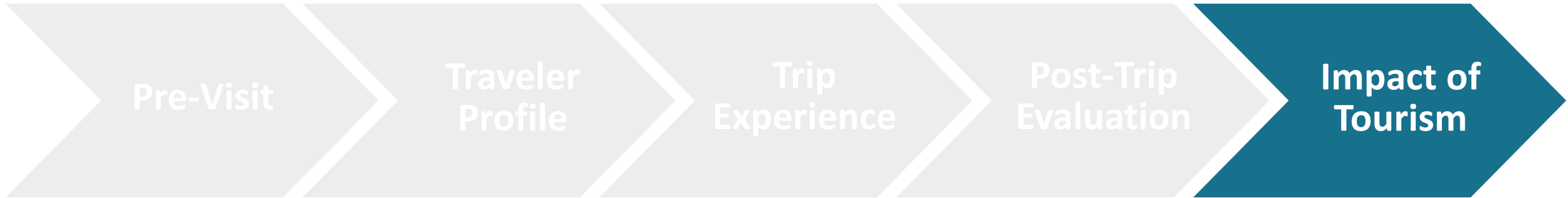




# TOURISM PROGRESS REPORT

TOURISM PERFORMANCE METRICS

# VISITOR JOURNEY: IMPACT OF TOURISM



# SNAPSHOT: IMPACT OF TOURISM



During July-Sept of 2023, occupancy rates were down 5.8% compared to the same period in 2022. However, Average Daily Rate was up 4.1%, resulting in RevPAR being down just 1.9%, while Direct Spend and Economic Impact were down 0.1% and 7.0% respectively.



Although Visitation, Room nights, and Visitor Days are all down compared to July-Sept in 2022, ADR, RevPAR, and Direct Spend are all still significantly outperforming 2019 levels.



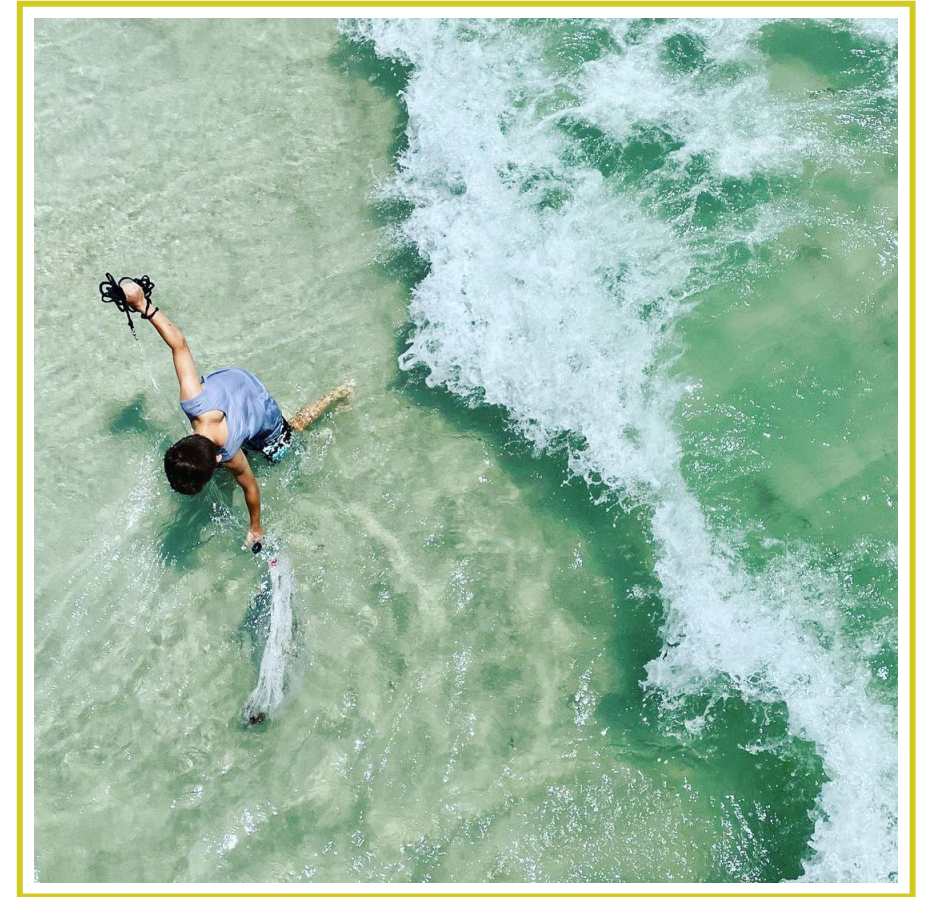
The visitors who came to the Paradise Coast in July-Sept had larger travel party sizes and stayed longer than those who visited in July-Sept of 2022. These visitors were also more likely to travel with family.



Advertising recall rates increased from 16% to 23%, with the share of visitors who indicated that they were directly influenced to visit Naples because they saw or heard an ad for the area rose from 9% to 12% as well.



International visitation continues to rebound in July-Sept of 2023. One in ten visitors arrived from outside the U.S., a significant increase from the 6.3% of visitors seen in July-Sept of 2022, and a slight increase from the 9.9% of visitors seen last quarter.



## OCCUPANCY RATE

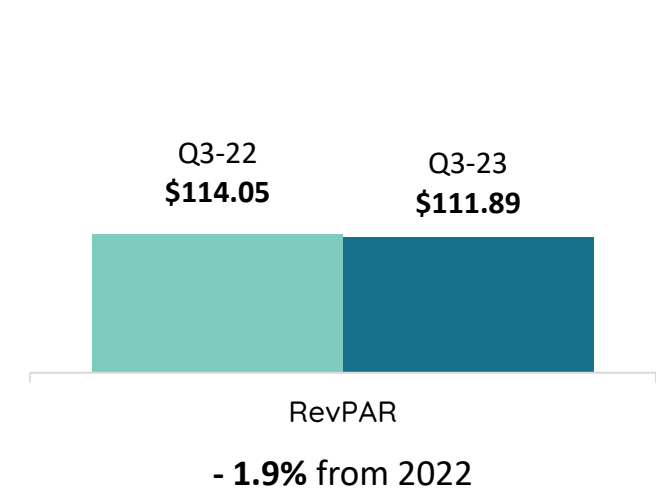
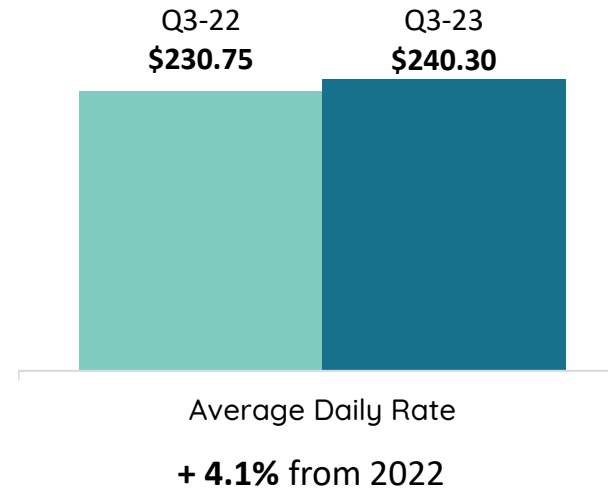
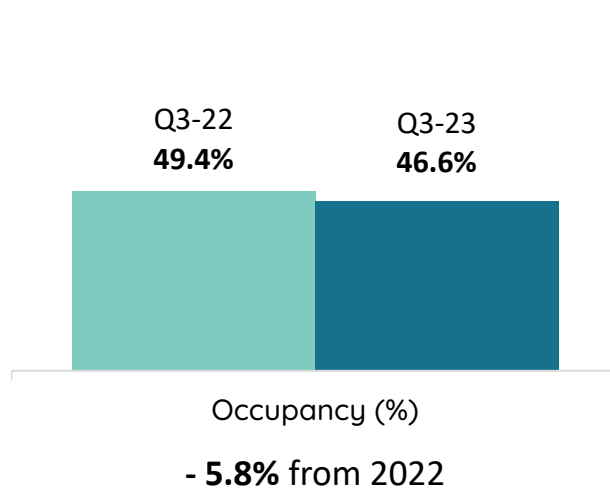
# 46.6%

## AVERAGE DAILY RATE

# \$240.30

## REVENUE PER AVAILABLE ROOM

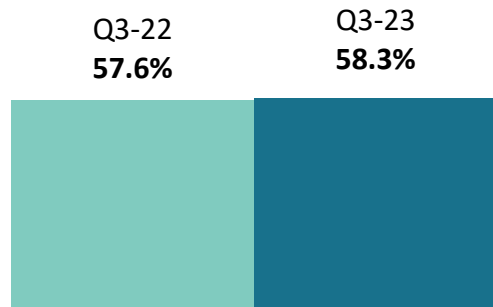
# \$111.89



<sup>1</sup>Sources: STR, AllTheRooms, and DSG Occupancy Study

## OCCUPANCY RATE

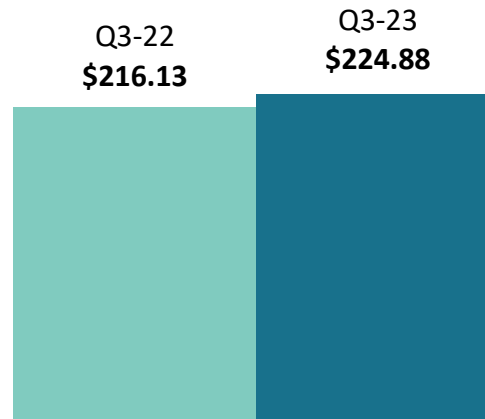
58.3%



+ 1.2% from 2022

## AVERAGE DAILY RATE

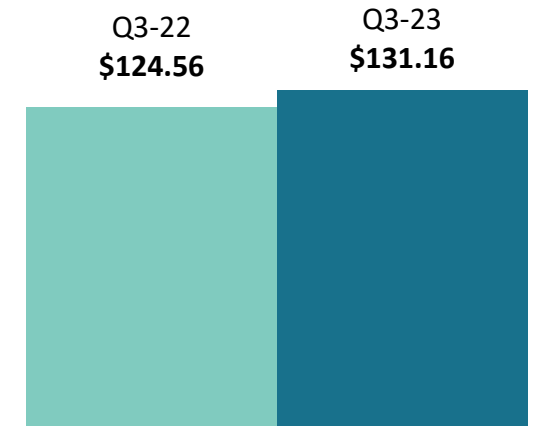
\$224.88



+ 4.0% from 2022

## REVENUE PER AVAILABLE ROOM

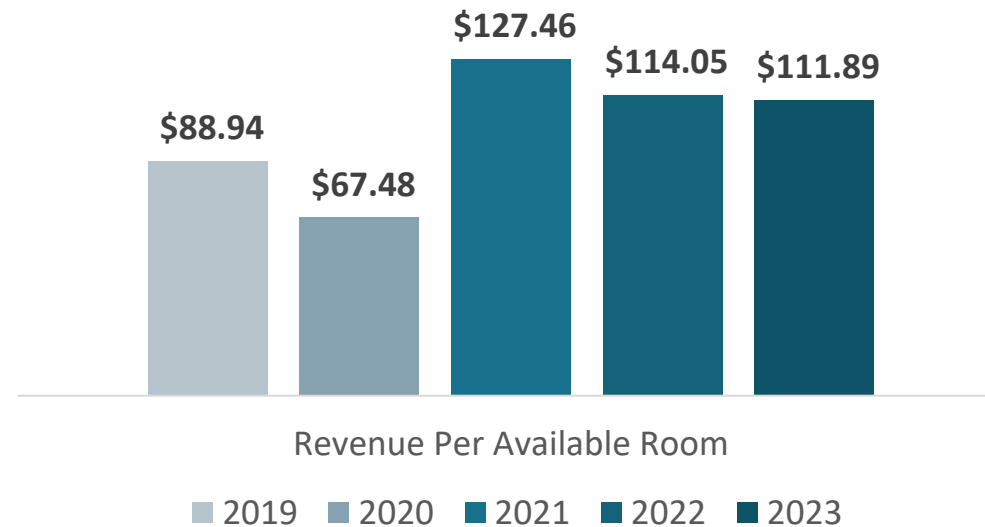
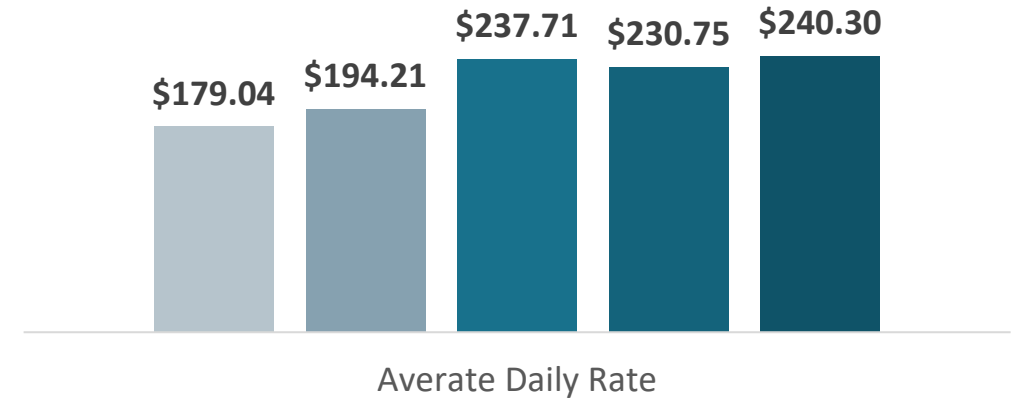
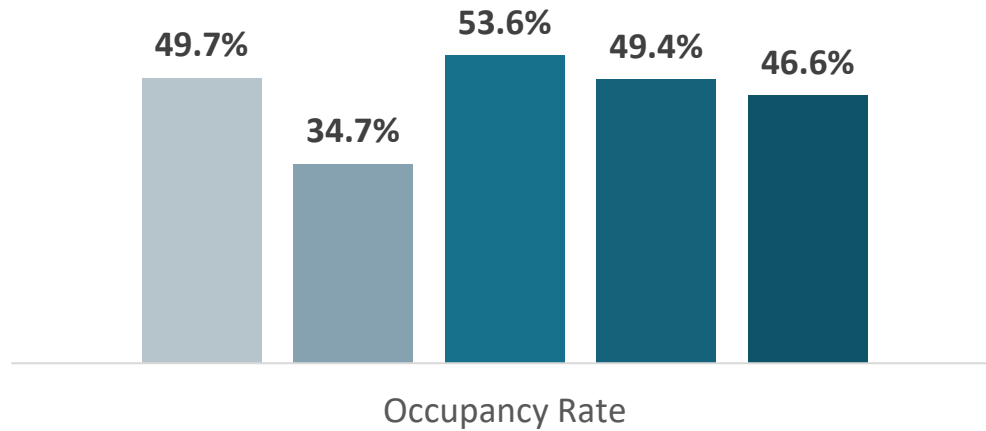
\$131.16



+ 5.3% from 2022

<sup>1</sup>Source: STR Reports

# Q3 2019-2023 OVERALL LODGING METRICS<sup>1</sup>



■ 2019 ■ 2020 ■ 2021 ■ 2022 ■ 2023

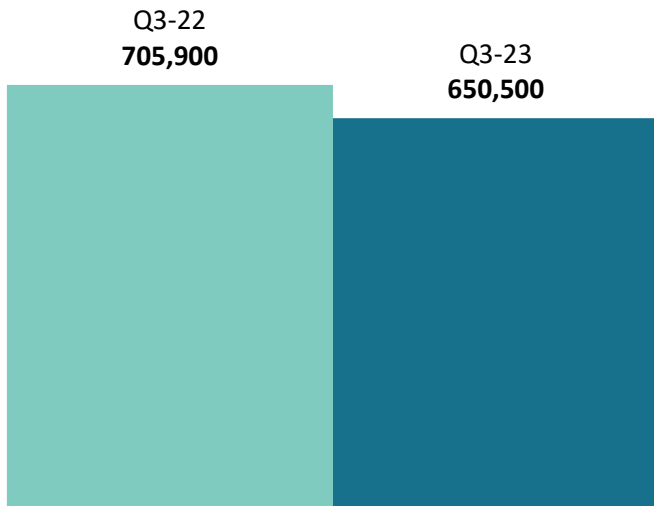
<sup>1</sup> Sources: STR, AllTheRooms, and DSG Occupancy Study



# Q3-2023 VISITATION & ROOM NIGHTS

## VISITORS

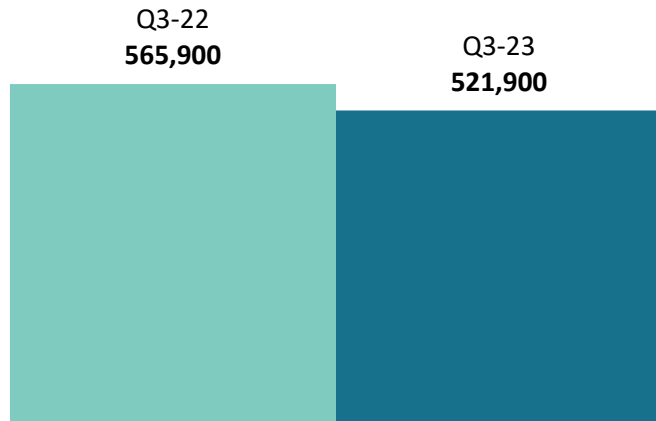
650,500



- 7.8% from 2022

## ROOM NIGHTS

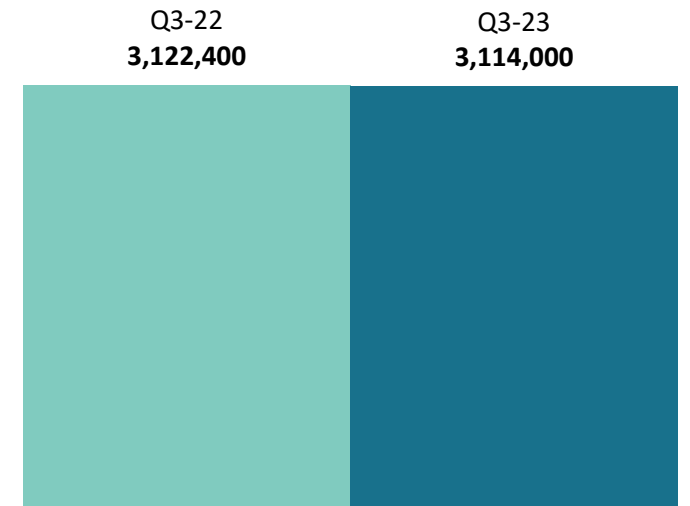
521,900



- 7.8% from 2022

## VISITOR DAYS

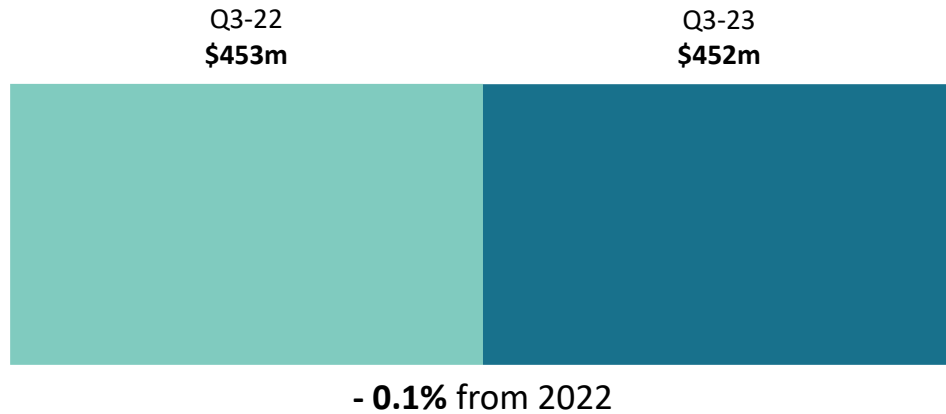
3,114,000



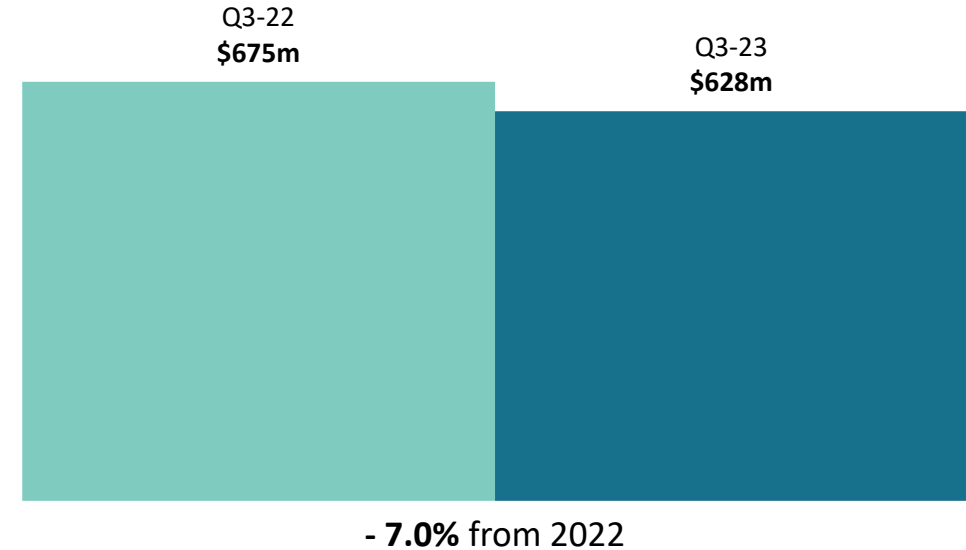
- 0.3% from 2022

# Q3-2023 SPENDING & ECONOMIC IMPACT

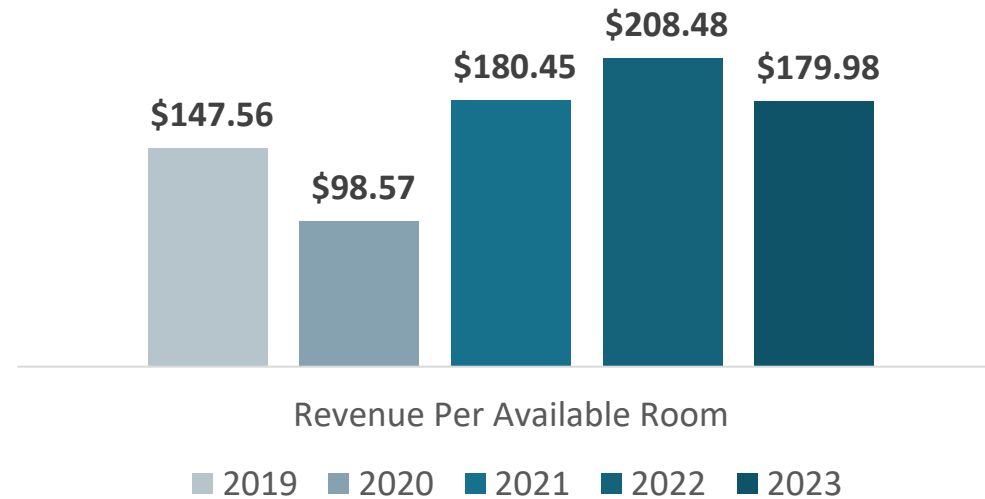
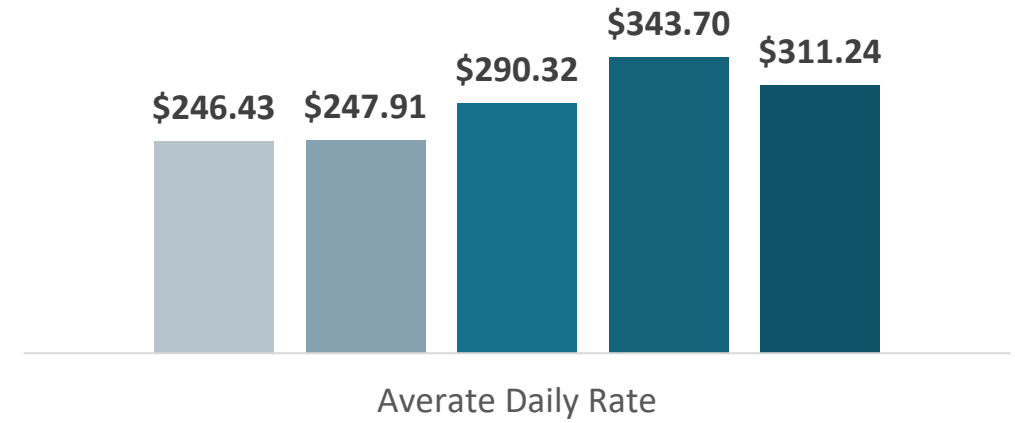
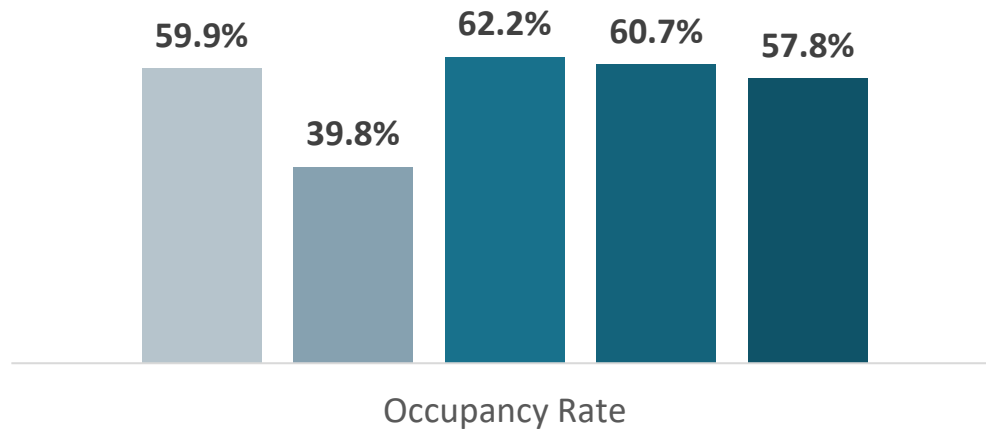
DIRECT SPENDING  
**\$452,464,900**



ECONOMIC IMPACT  
**\$628,021,300**

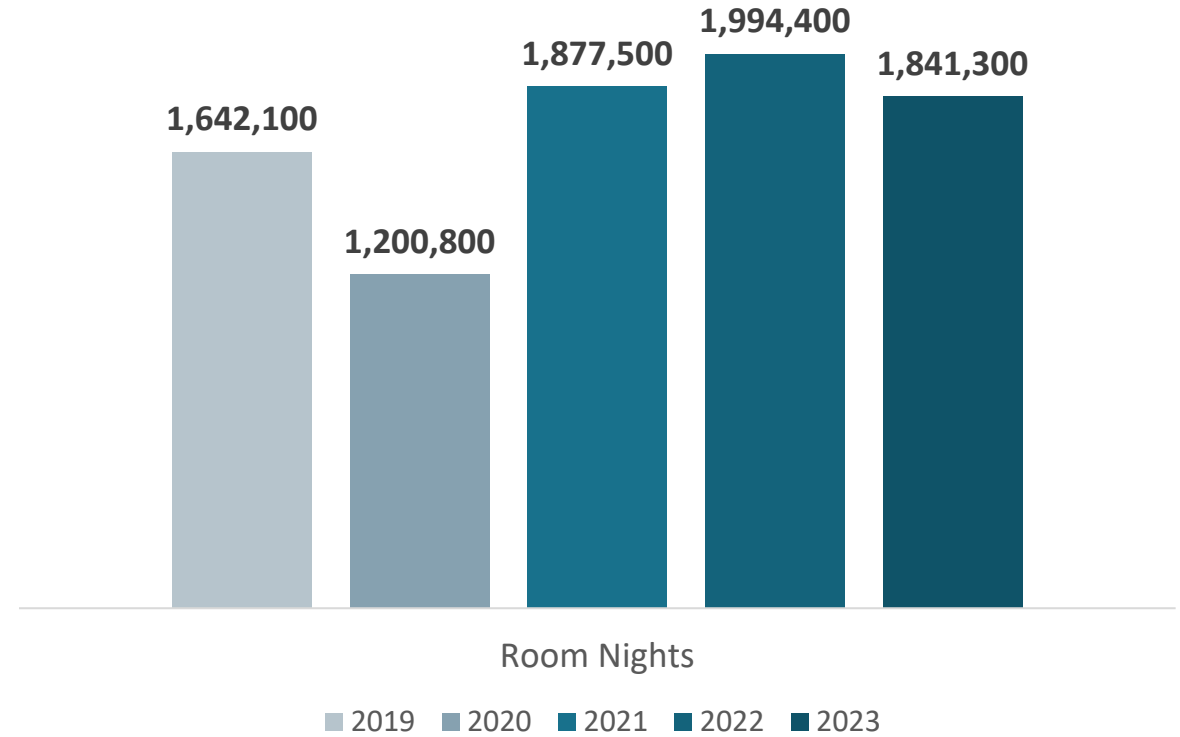
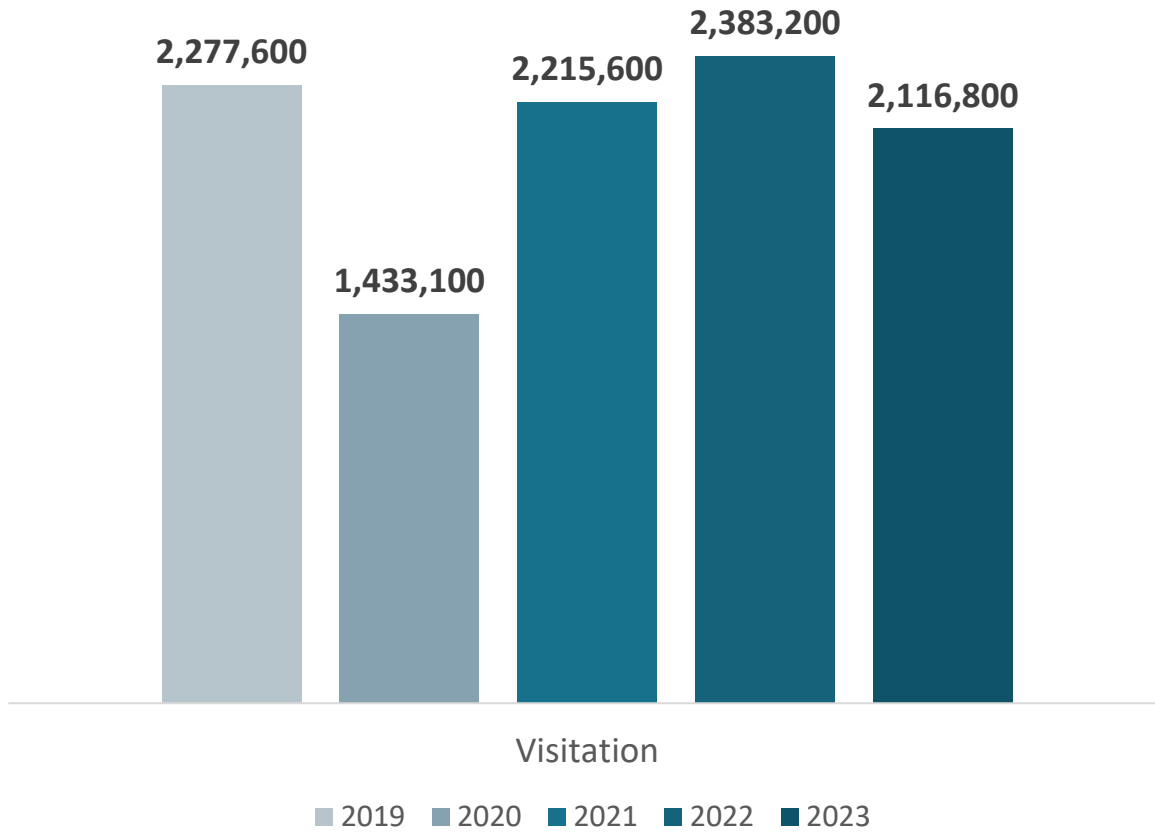


# CYTD 2019-2023 OVERALL LODGING METRICS<sup>1</sup>



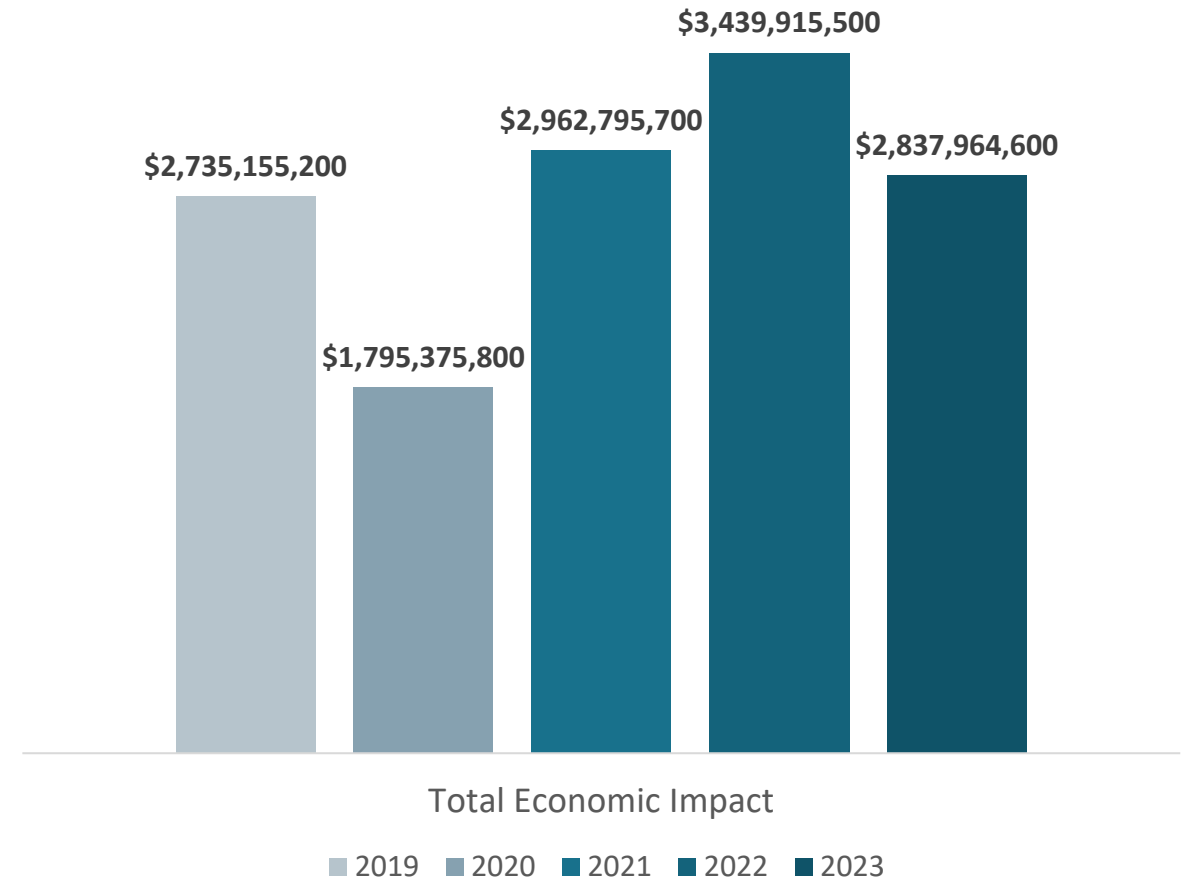
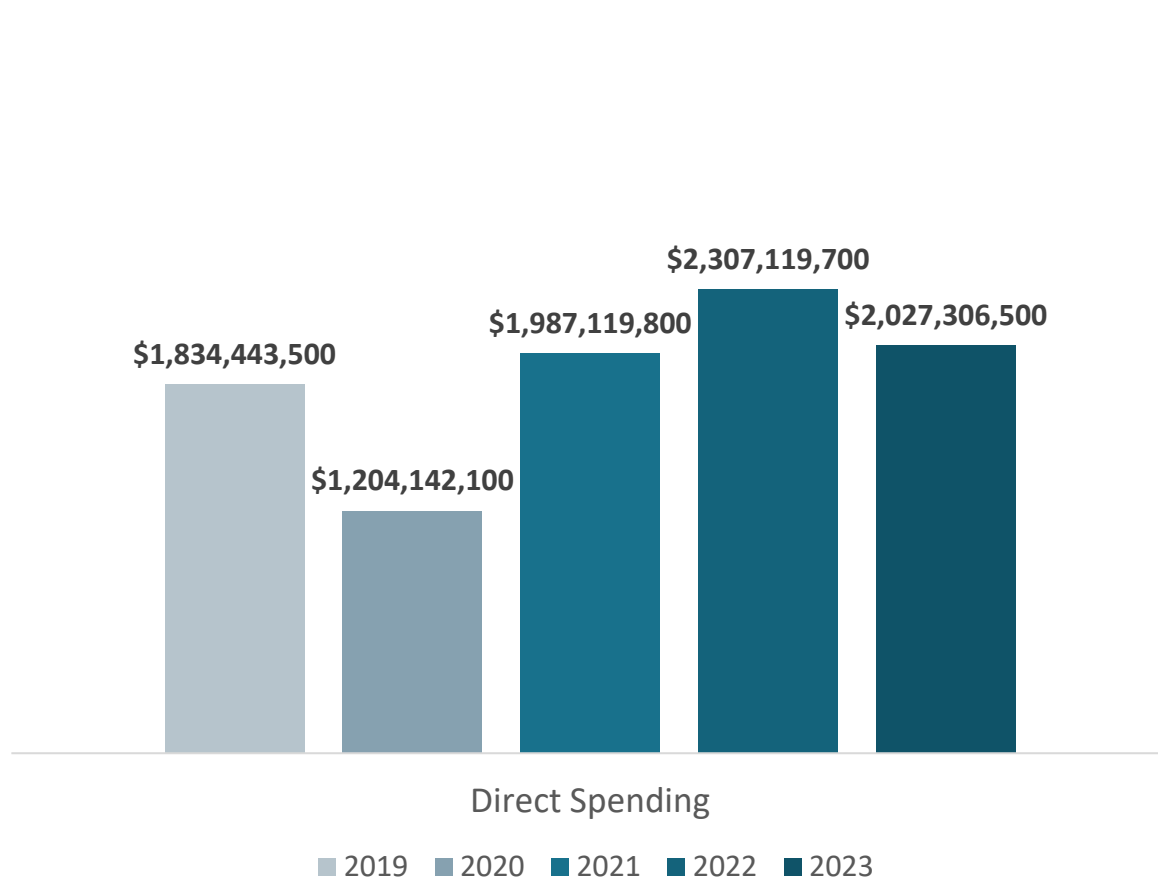
<sup>1</sup> Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

# CYTD 2019-2023 VISITATION & ROOM NIGHTS<sup>1</sup>



<sup>1</sup> Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

# CYTD 2019-2023 SPENDING & ECONOMIC IMPACT<sup>1</sup>

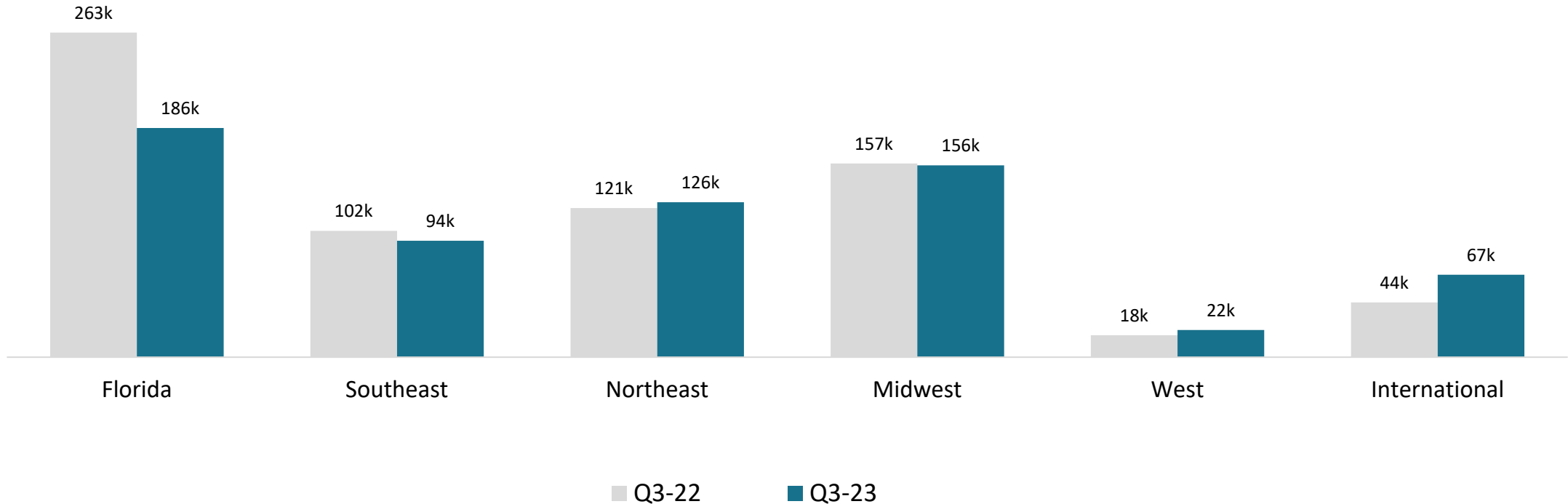


<sup>1</sup> Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

# VISITOR ORIGIN

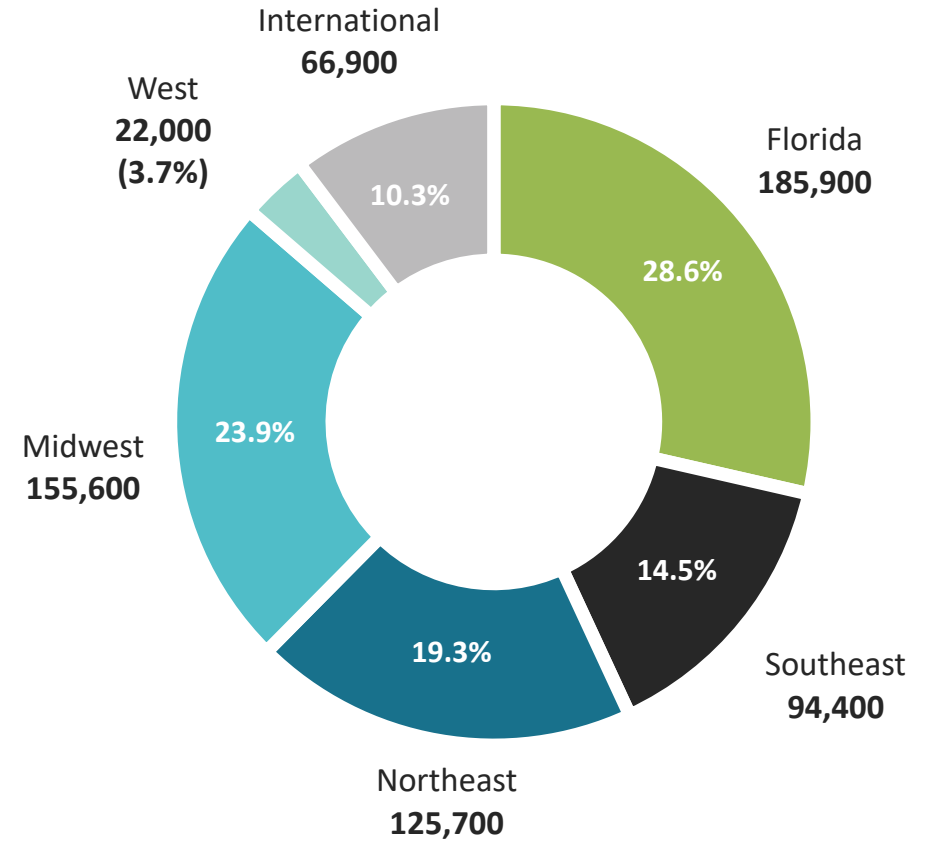
FLORIDA VISITORS  
**185,900**

OUT-OF-STATE VISITORS  
**464,600**

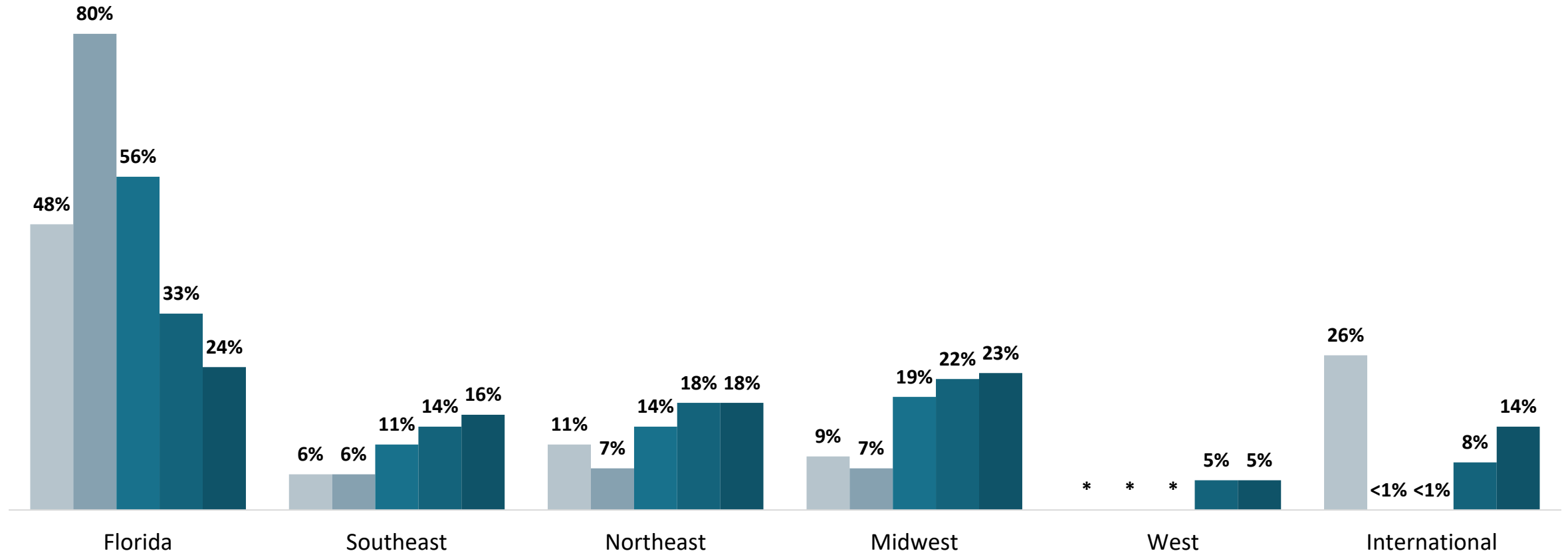


# VISITOR ORIGIN REGIONS

Region	Q3 2022		Q3 2023		Percent Change (Δ%)	
	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	263,300	37.3%	185,900	28.6%	-29.4%	-23.3%
Southeast	102,400	14.5%	94,400	14.5%	-7.8%	0.0%
Northeast	120,900	17.1%	125,700	19.3%	4.0%	12.9%
Midwest	157,100	22.3%	155,600	23.9%	-1.0%	7.2%
West	17,800	2.5%	22,000	3.4%	23.6%	36.0%
Canada	16,000	2.3%	23,800	3.7%	48.8%	60.9%
Europe	14,000	2.0%	31,600	4.9%	125.7%	145.0%
UK	[6,000]	[0.9%]	[8,700]	[1.3%]	45%	44%
Germany	[3,000]	[0.4%]	[7,100]	[1.1%]	137%	175%
Other Europe	[5,000]	[0.7%]	[15,800]	[2.5%]	216%	257%
C/S America	5,600	0.8%	6,100	0.9%	8.9%	12.5%
Other	8,800	1.2%	5,400	0.8%	-38.6%	-33.3%
<b>Total</b>	<b>705,900</b>	<b>100.0%</b>	<b>650,500</b>	<b>100.0%</b>		



# Q3 2019-2023 OVERNIGHT VISITOR ORIGIN



■ Q3-19  
 ■ Q3-20  
 ■ Q3-21  
 ■ Q3-22  
 ■ Q3-23

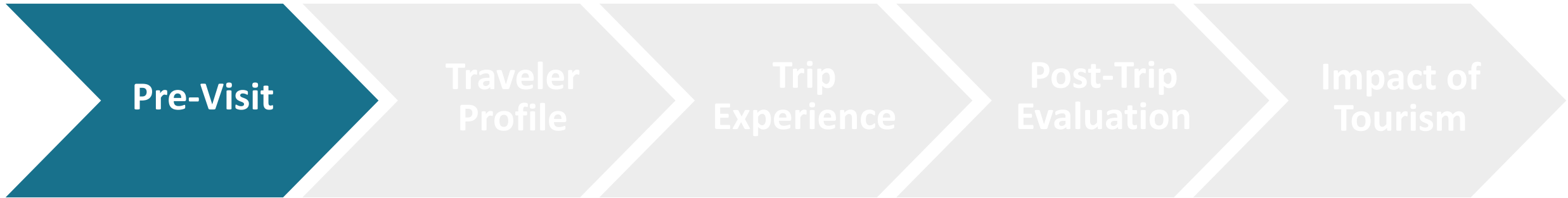
\*Note: The "West" was not separated from "Other" before 2022. Beginning in 2022, "West" was added and "Other" was changed to "Other International".





# TOPLINE FINDINGS

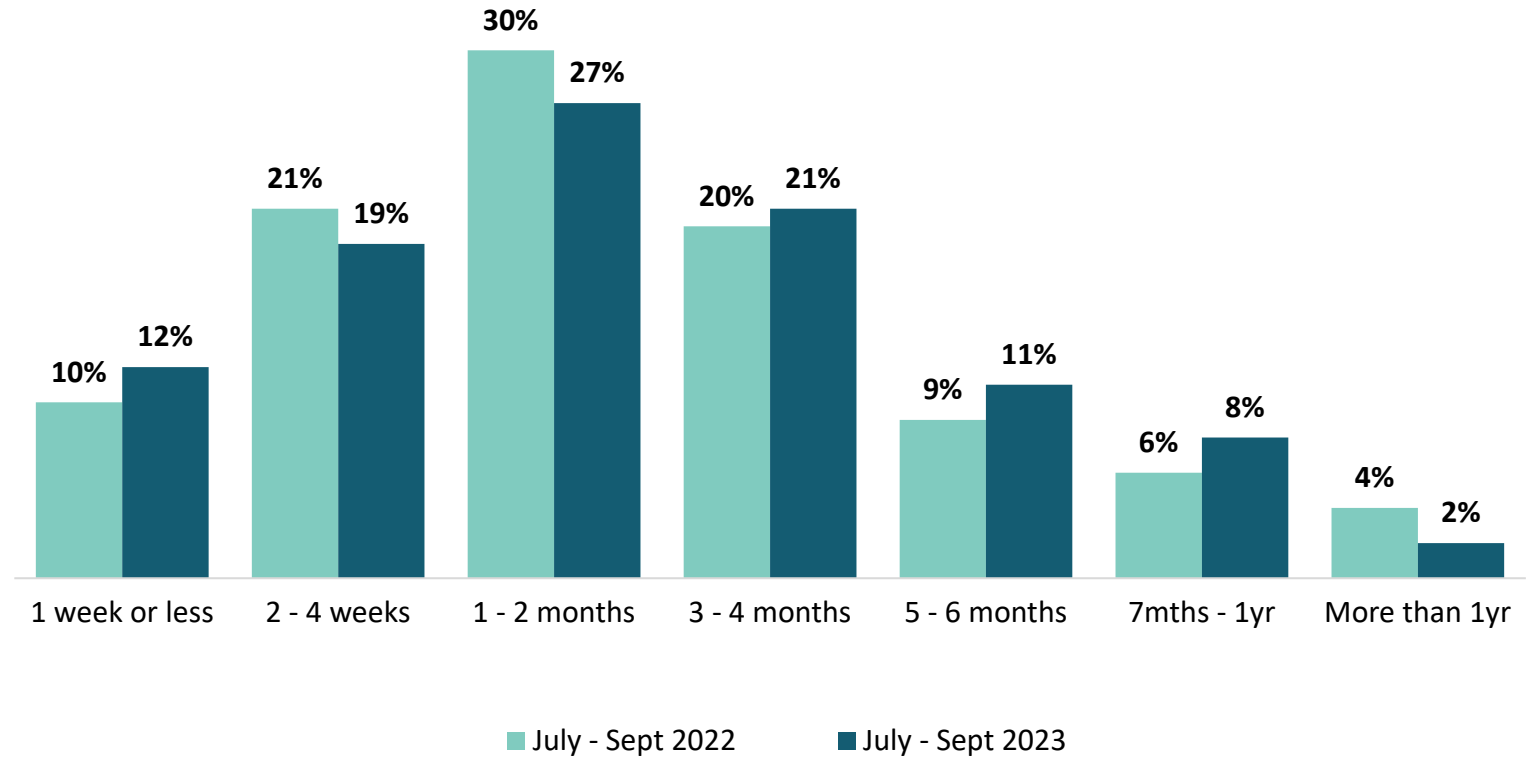
# VISITOR JOURNEY: PRE-VISIT



# TRIP PLANNING CYCLE



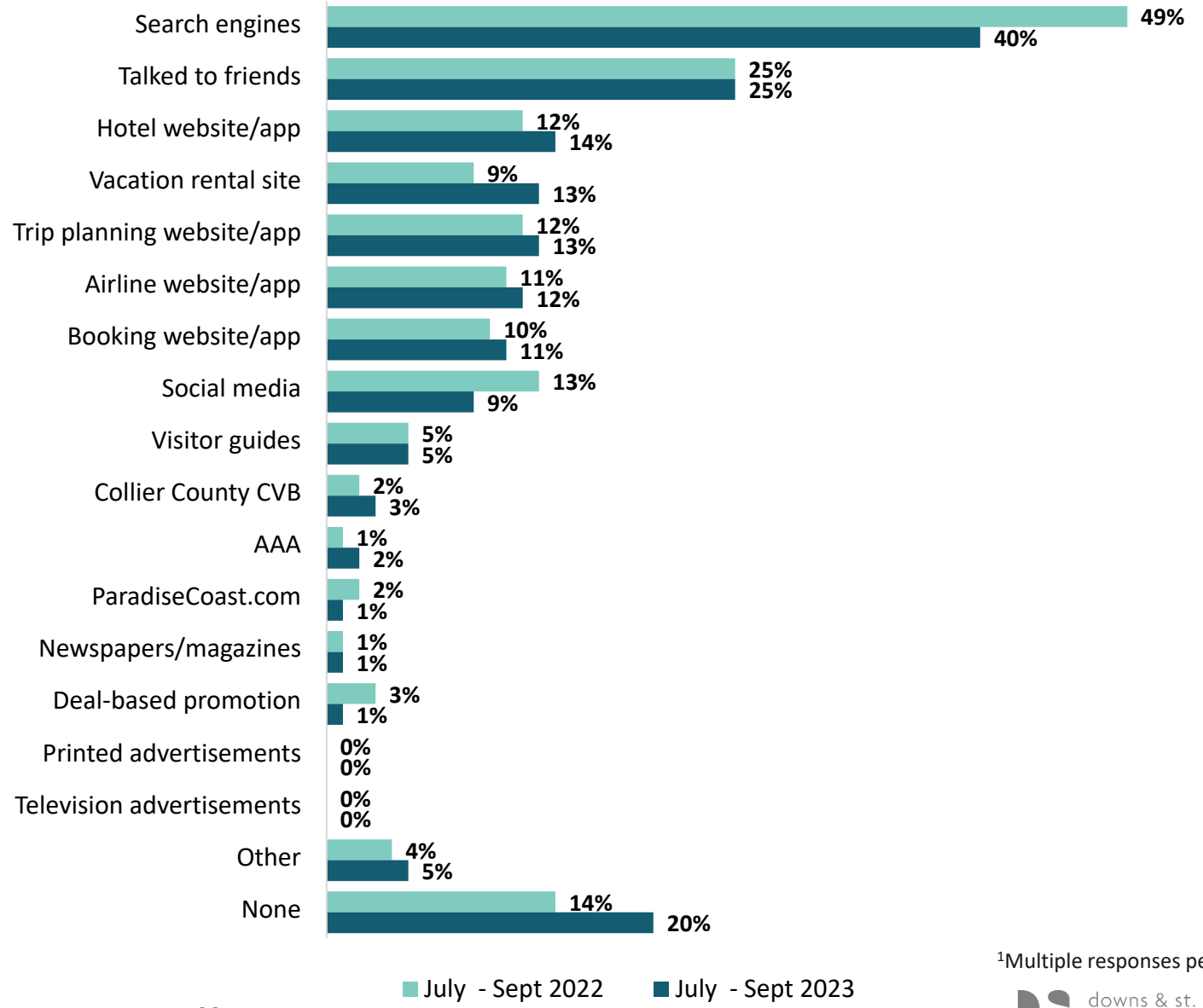
Typical visitors to the Naples, Marco Island, Everglades area planned their trip 51 days in advance



# TOP TRIP PLANNING RESOURCES<sup>1</sup>



Visitors to the Naples, Marco Island, Everglades area relied heavily on talking to friends/family, airline sites/apps, and online search engines to plan their trips prior to arriving in the area

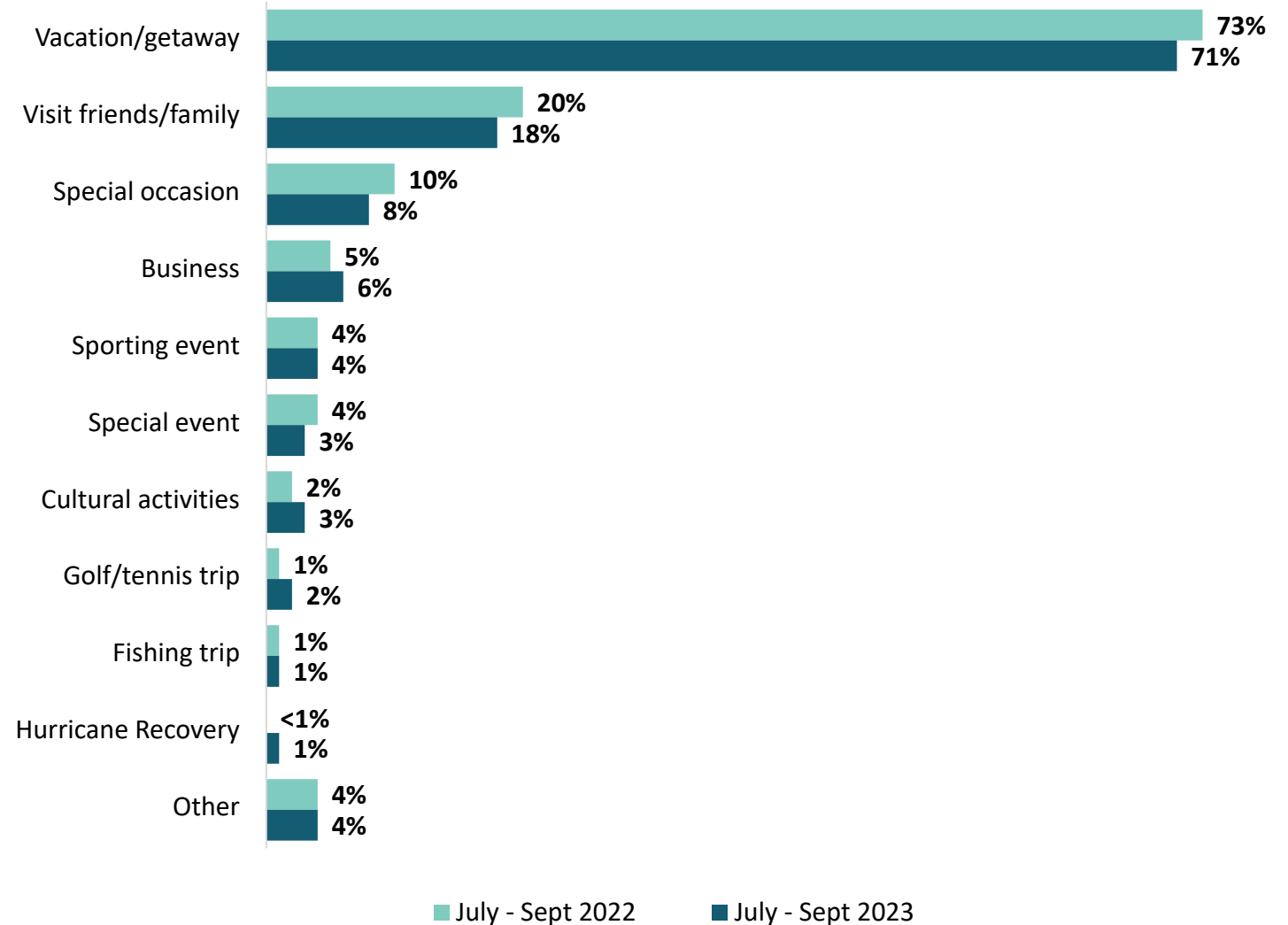


<sup>1</sup>Multiple responses permitted.

# TOP REASONS FOR VISITING<sup>1</sup>



Visitors overwhelmingly traveled to the Naples, Marco Island, Everglades area for a vacation or getaway

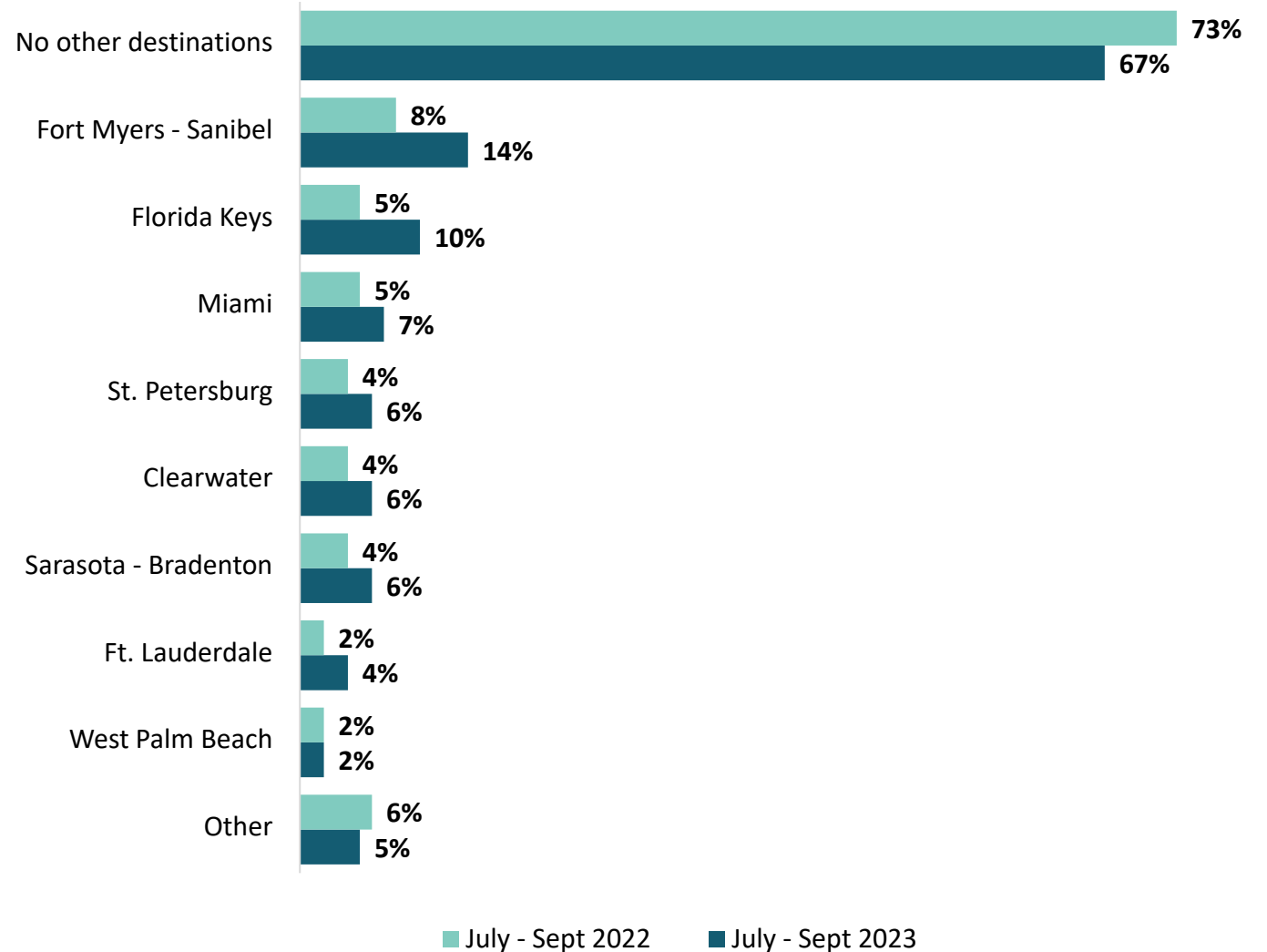


<sup>1</sup>Multiple responses permitted.

# TOP OTHER DESTINATIONS CONSIDERED<sup>1</sup>



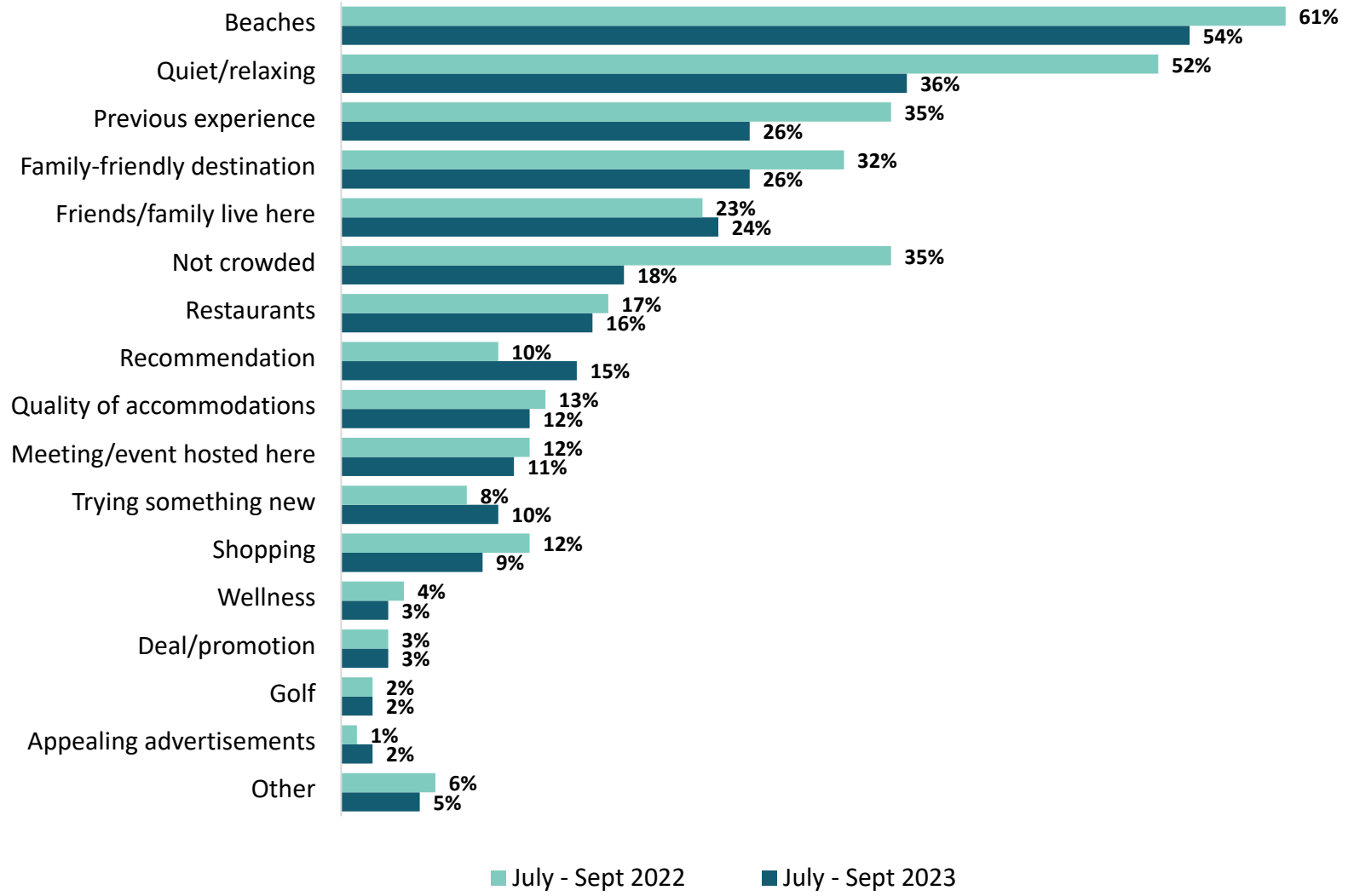
2 in 3 visitors did not consider any alternatives to the Naples, Marco Island, Everglades area when selecting a trip destination



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

# TOP REASONS FOR CHOOSING DESTINATION<sup>1</sup>

Over half the visitors chose the Naples, Marco Island, Everglades area because of its beaches



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



Over half the visitors flew to the Naples, Marco Island, Everglades area



Most visitors who flew used Southwest Florida International Airport (RSW)





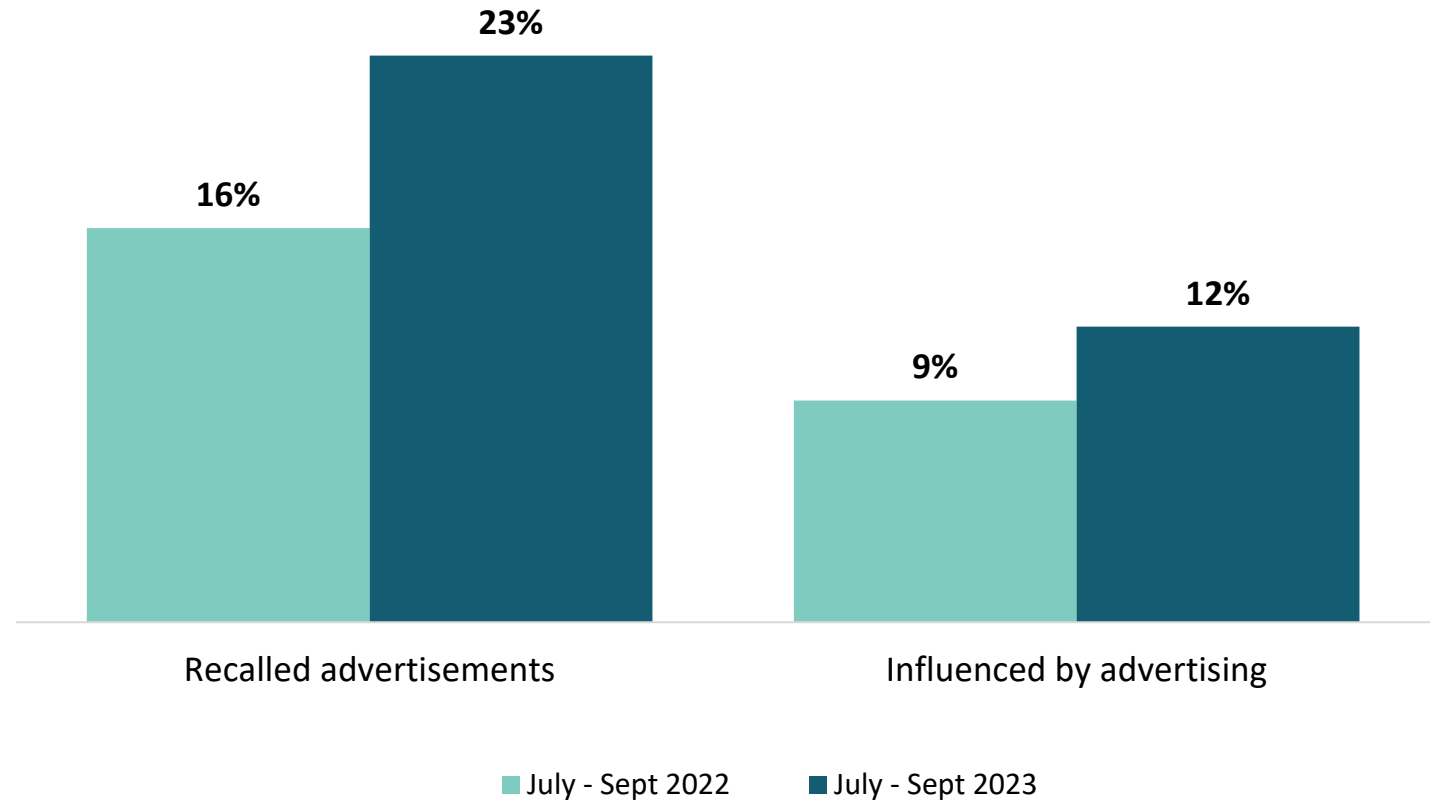
# ADVERTISING RECALL & INFLUENCE



Nearly 1 in 4 visitors recalled reading, seeing, or hearing advertising for the Naples area prior to their trip



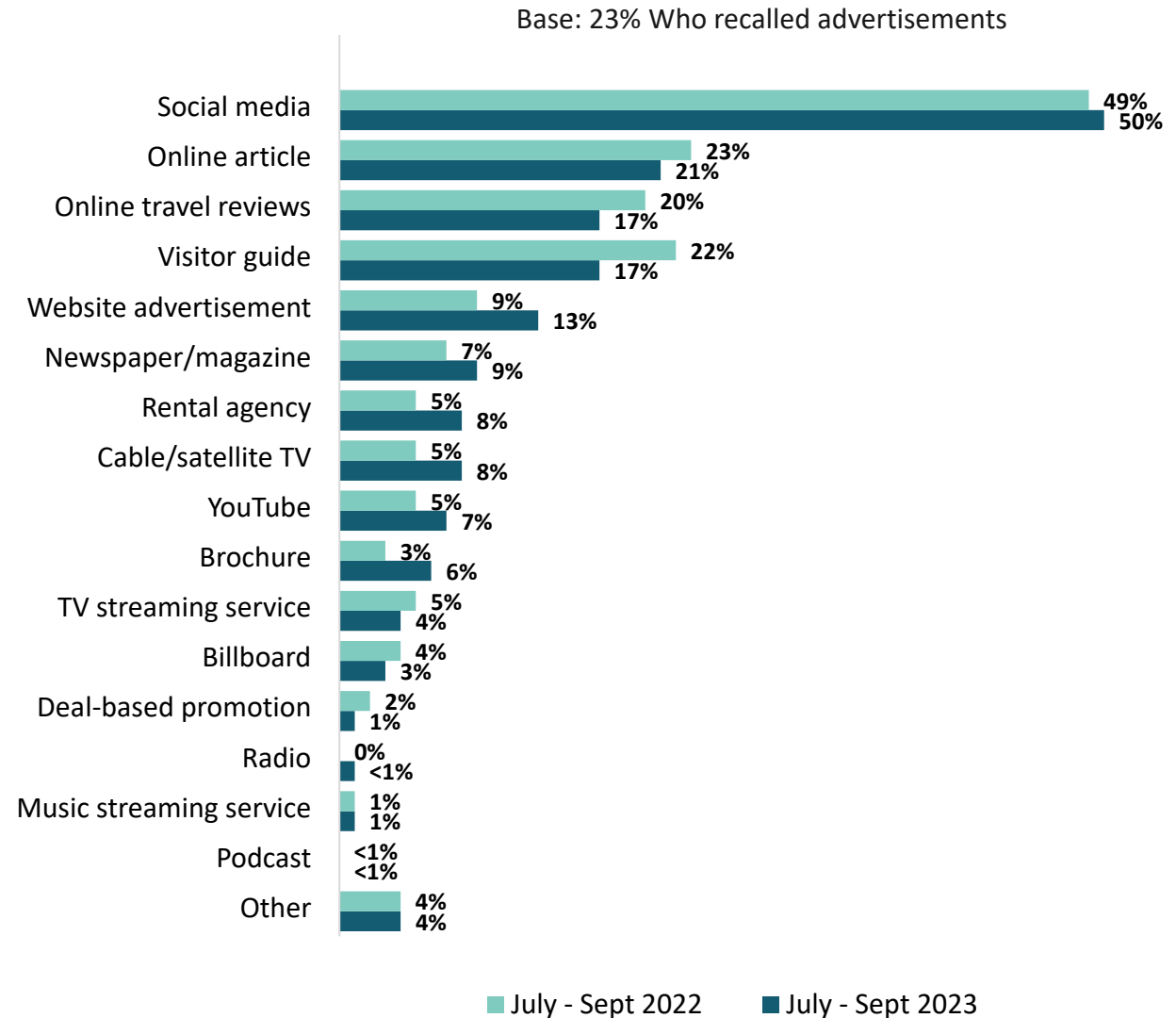
Nearly 1 in 6 visitors reported that advertising directly influenced their decision to visit the Naples area



# SOURCES OF ADVERTISING RECALL<sup>1</sup>

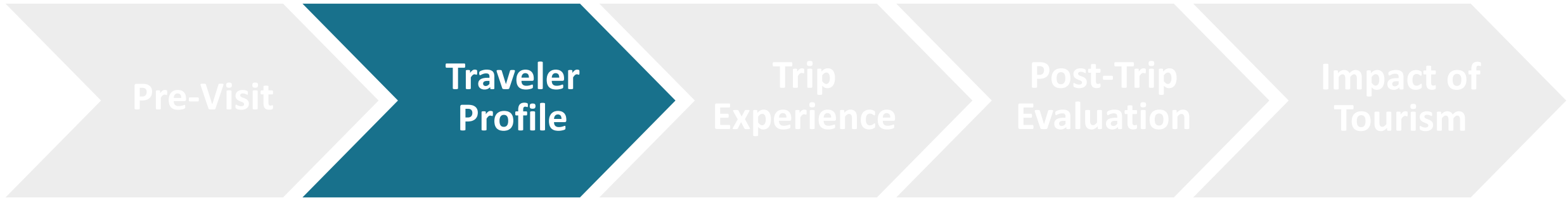


Half of visitors who recalled advertisements for the Naples area recalled social media advertising



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

# VISITOR JOURNEY: TRAVELER PROFILE



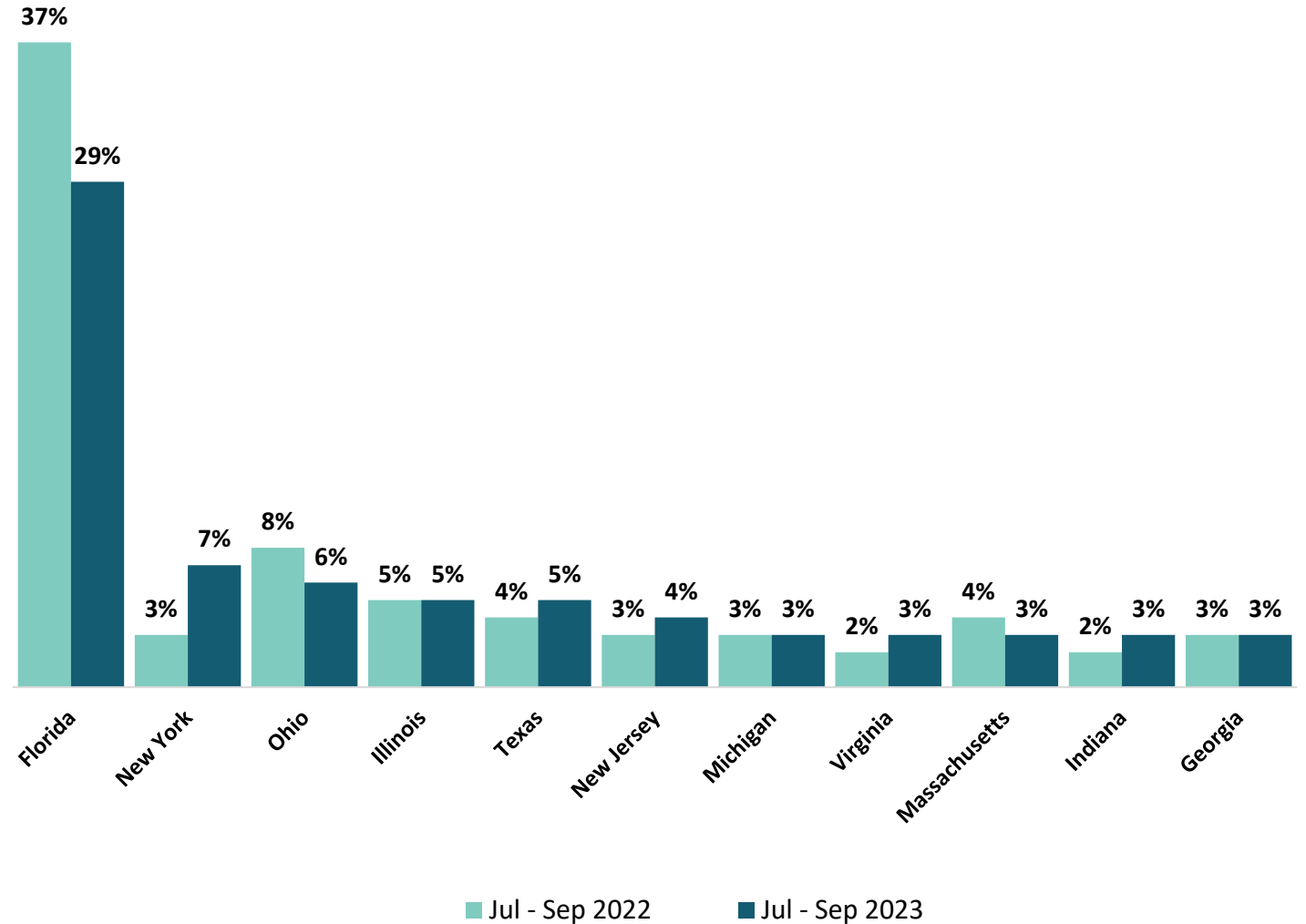
# TOP ORIGIN STATES



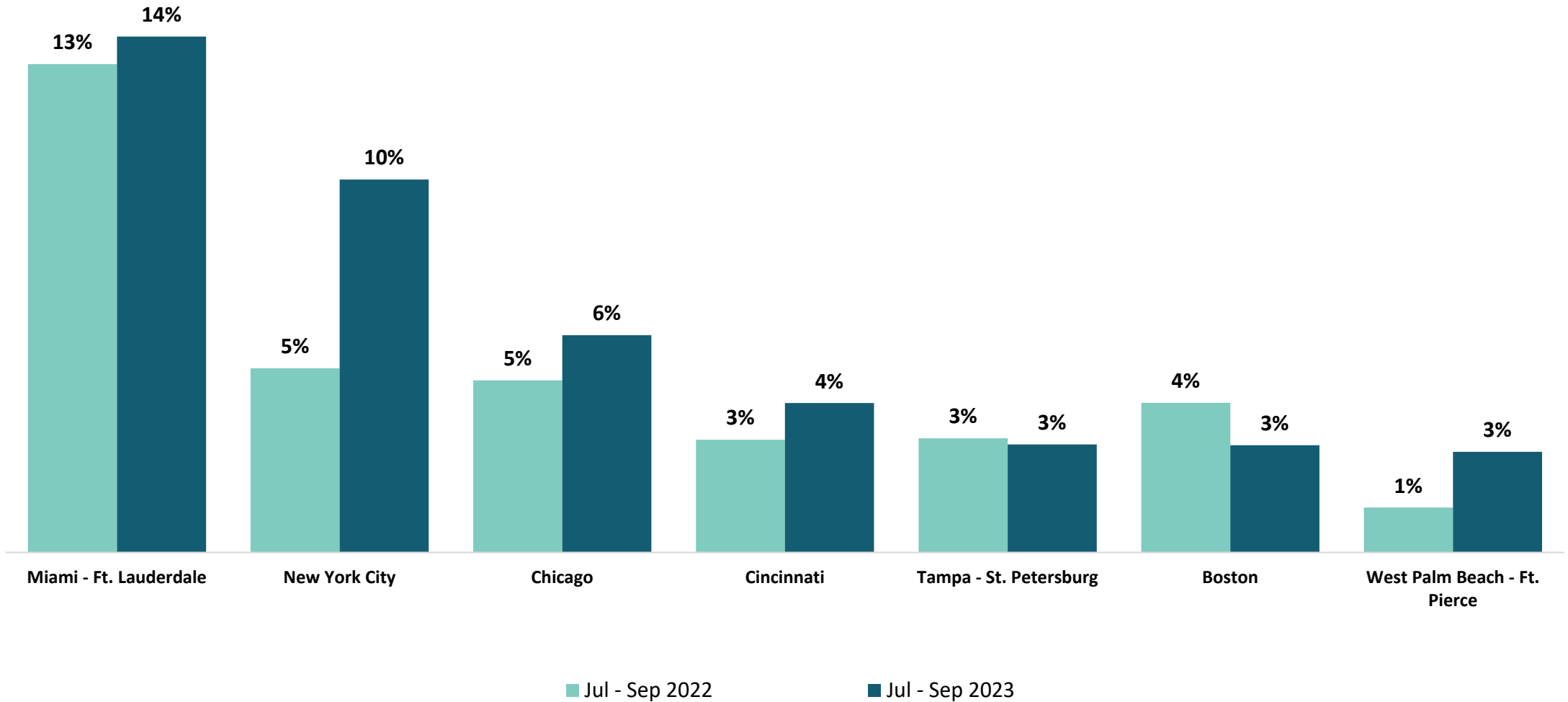
Over 1 in 4 visitors who traveled to the Naples, Marco Island, Everglades area were from another part of Florida.



11 U.S. States accounted for over 2 in 3 visitors who traveled to the Naples, Marco Island, Everglades area.



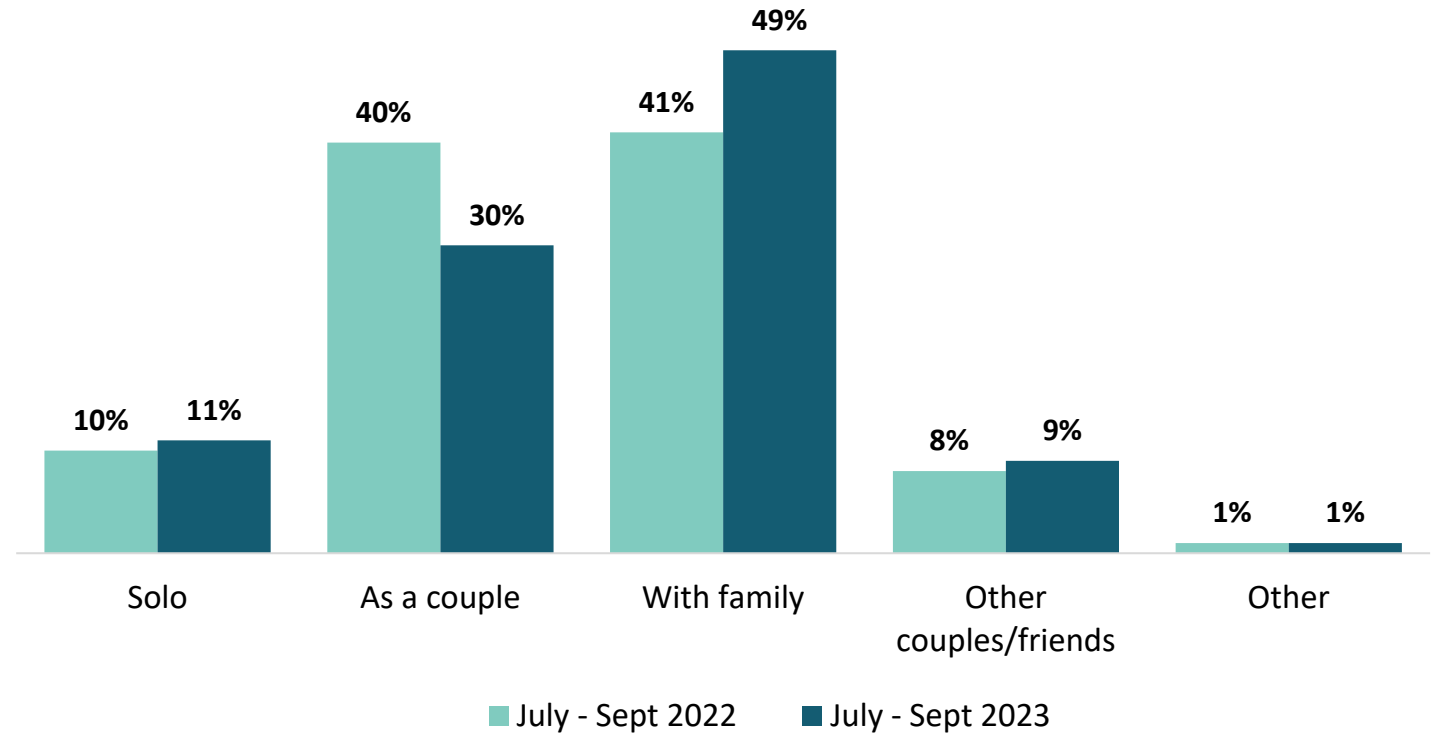
# TOP ORIGIN MARKETS



# TRAVEL PARTY COMPOSITION



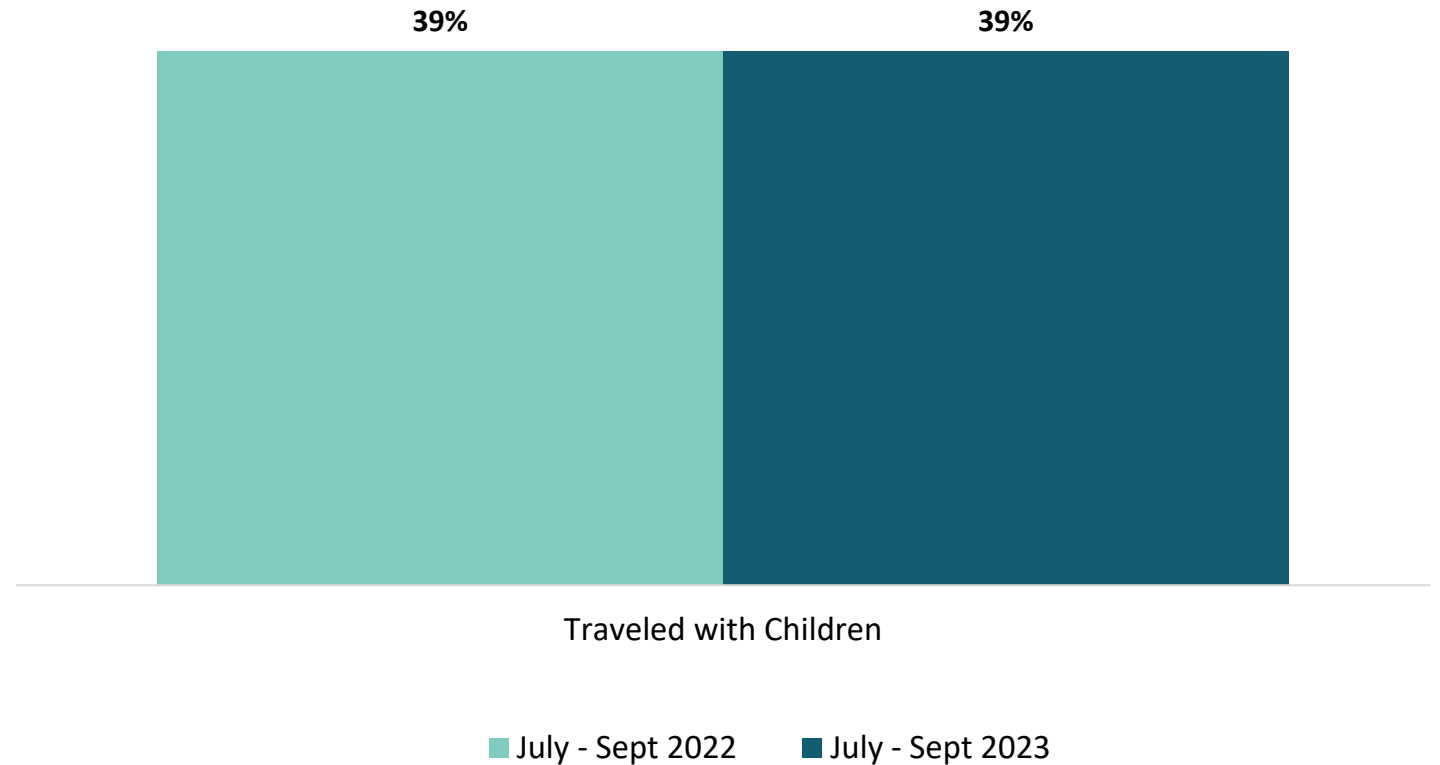
Typical visitors traveled to the Naples, Marco Island, Everglades area in parties of 3.3 people and nearly 1 in 2 visitors traveled with family



# CHILDREN IN TRAVEL PARTY



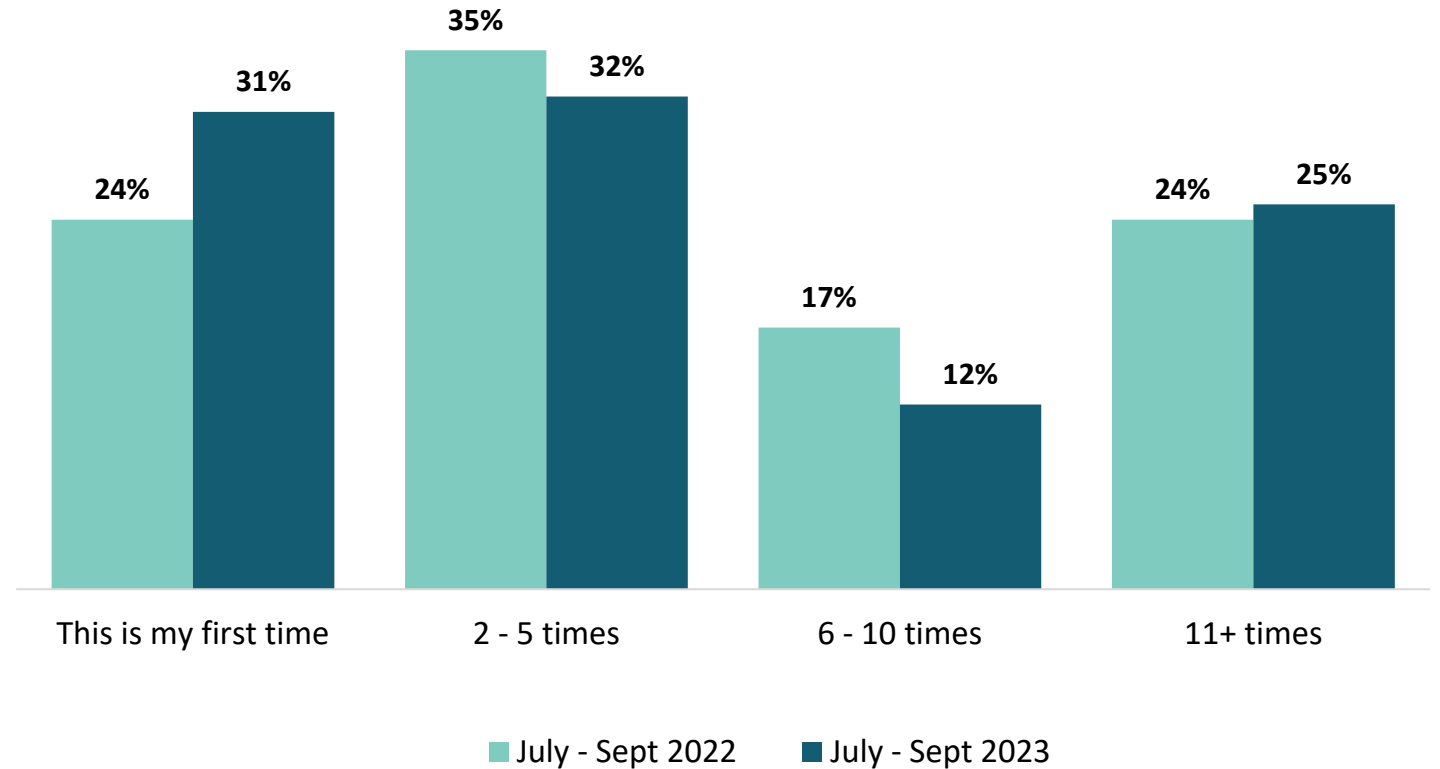
Nearly 2 in 5 visitors to the Naples, Marco Island, Everglades area brought children with them on their trip



# PREVIOUS VISITS



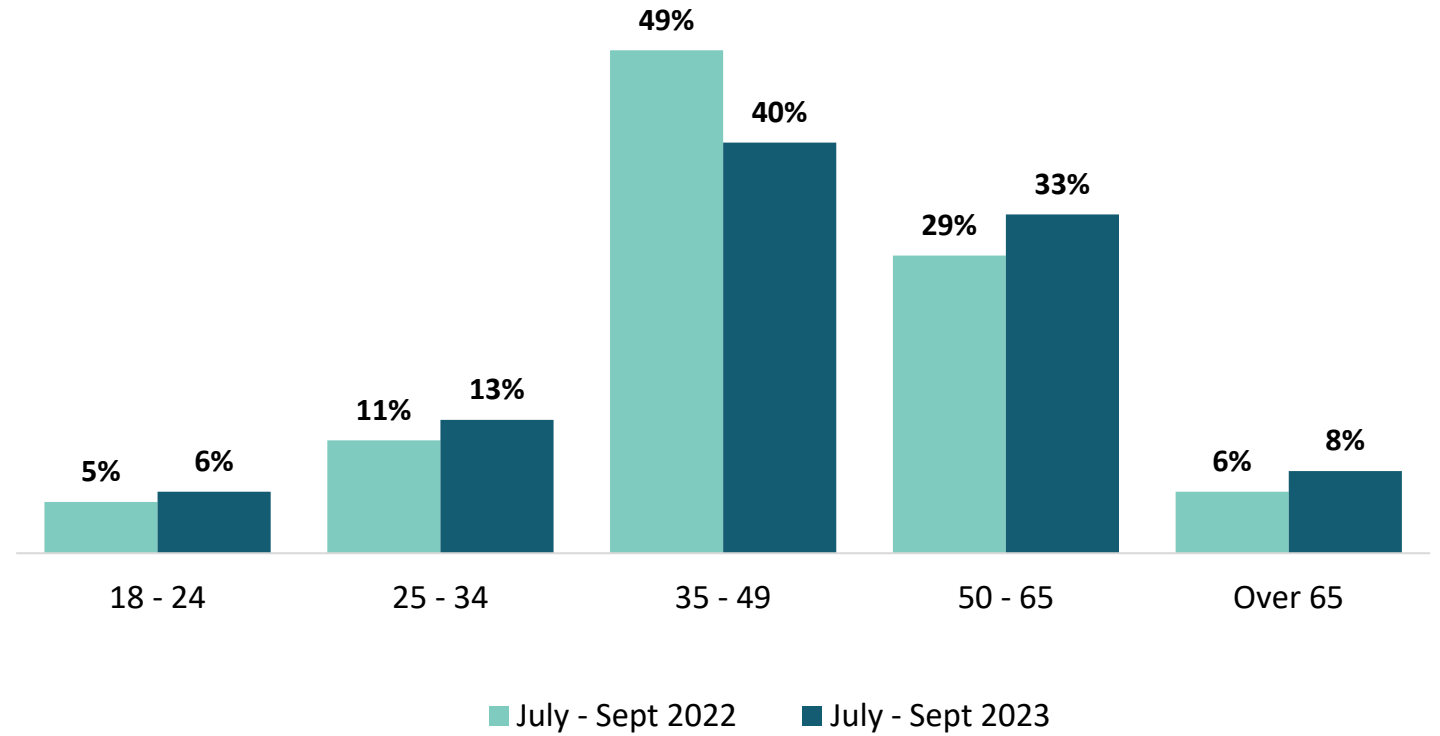
1 in 4 visitors had visited the Naples, Marco Island, Everglades area more than 10 times in the past





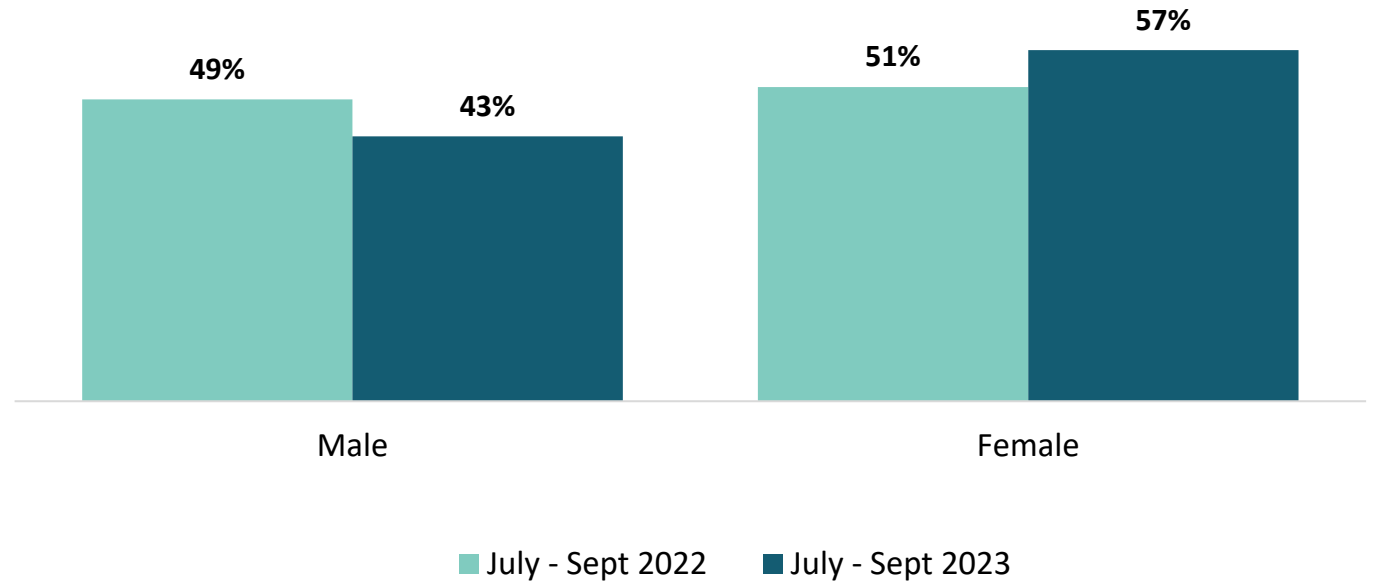


The median visitor to the Naples, Marco Island, Everglades area was 47 years old





Visitors to the Naples, Marco Island, Everglades area were slightly more likely to be female than they were to be male

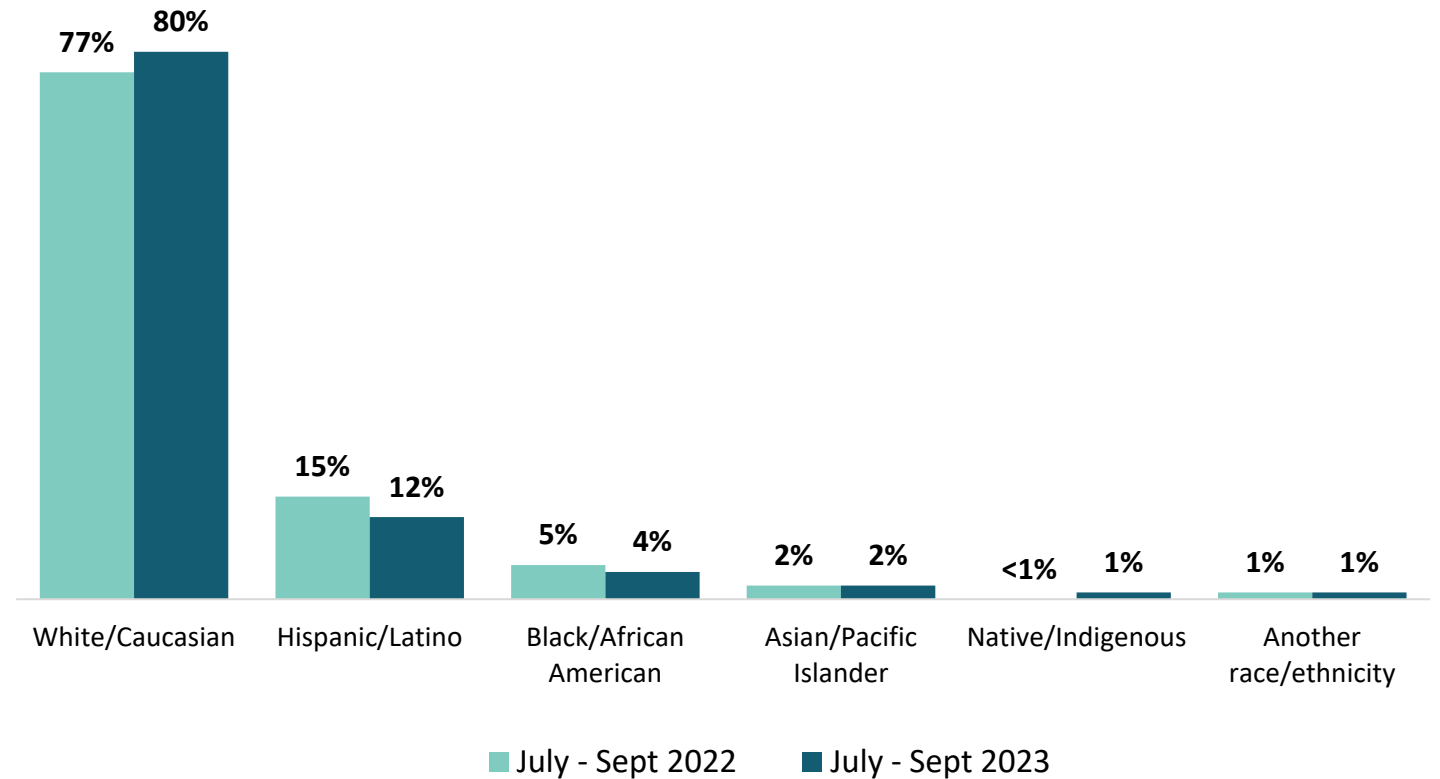


<sup>1</sup> Of travel party member who responded to survey. Females are generally more likely to respond to surveys.

# RACE/ETHNICITY



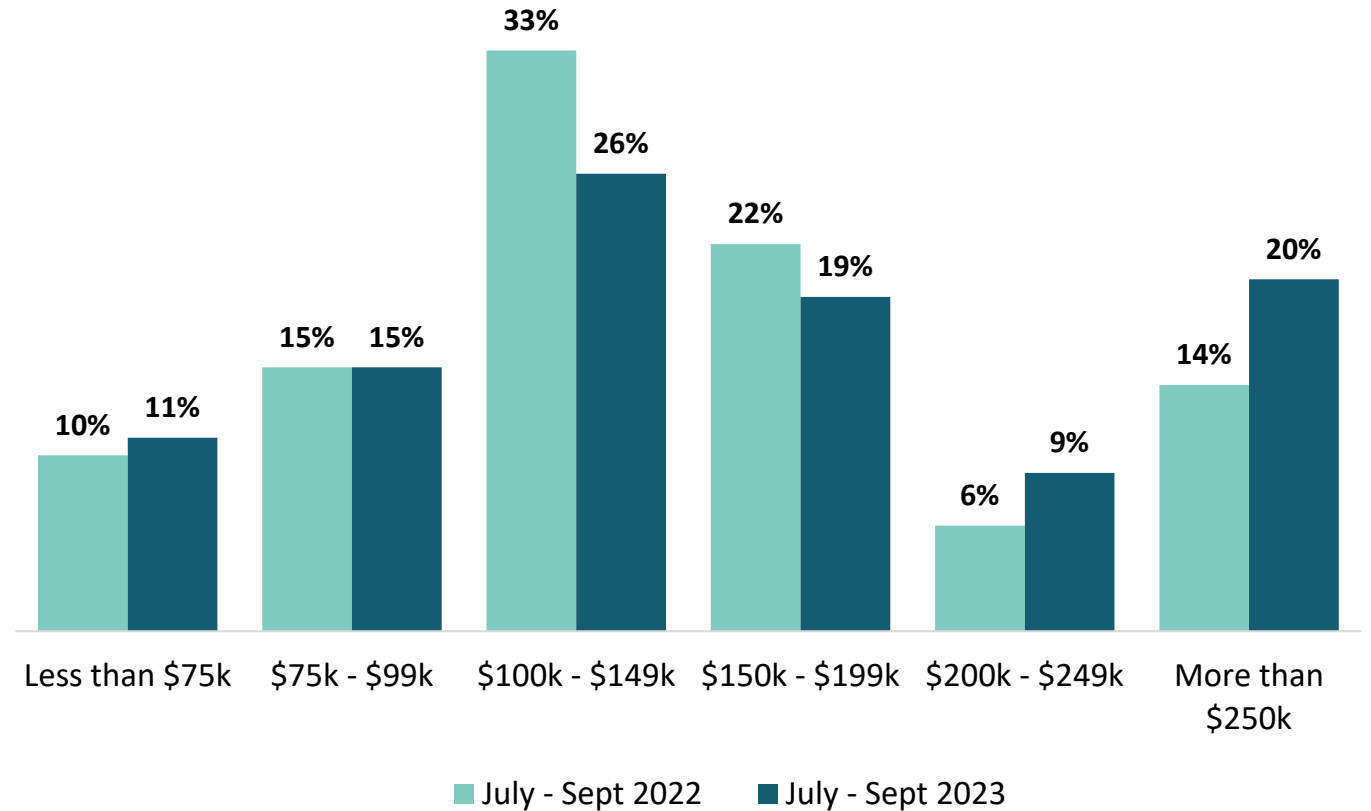
4 in 5 visitors to the Naples, Marco Island, Everglades area were White/Caucasian



# HOUSEHOLD INCOME



Typical visitors to the Naples, Marco Island, Everglades area earned \$146,000 in household income per year



# VISITOR JOURNEY: TRIP EXPERIENCE



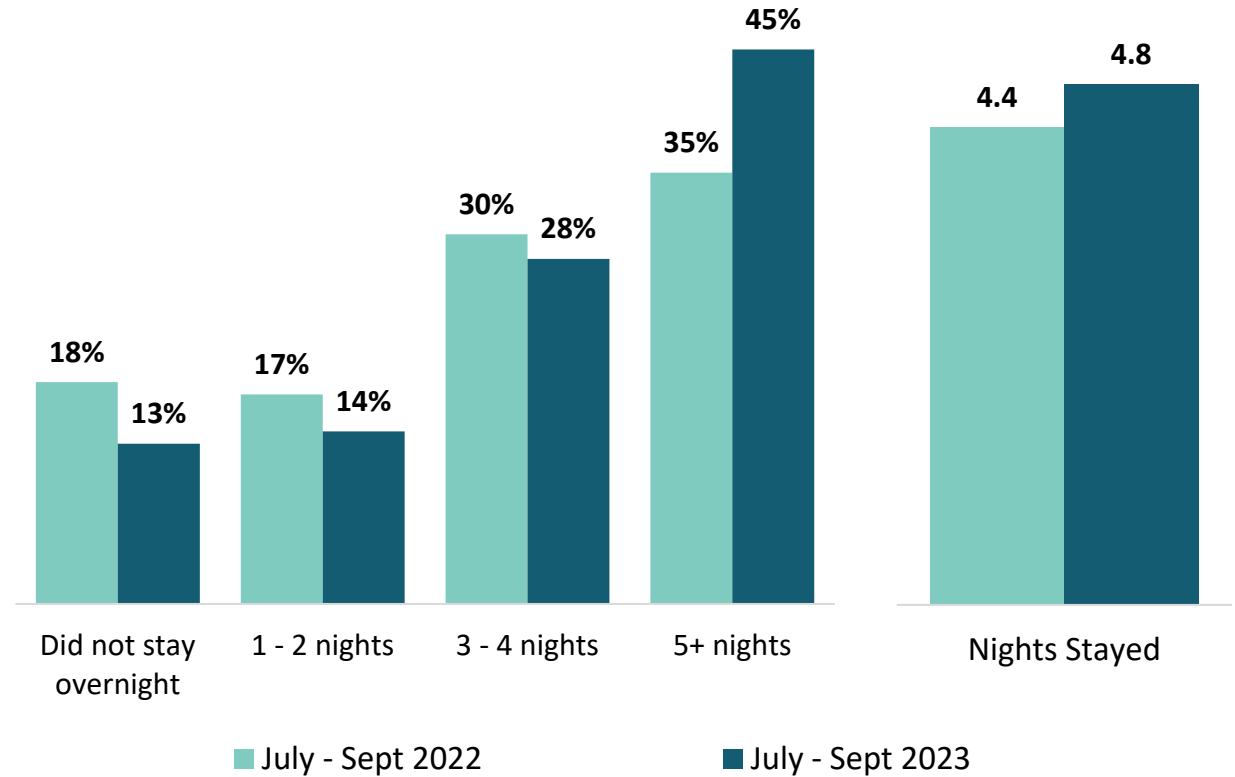
# AVERAGE NIGHTS STAYED



Over 2 in 5 visitors to the Naples, Marco Island, Everglades area stayed at least five nights



Typical overnight visitors spent 4.8 nights in the Naples, Marco Island, Everglades area



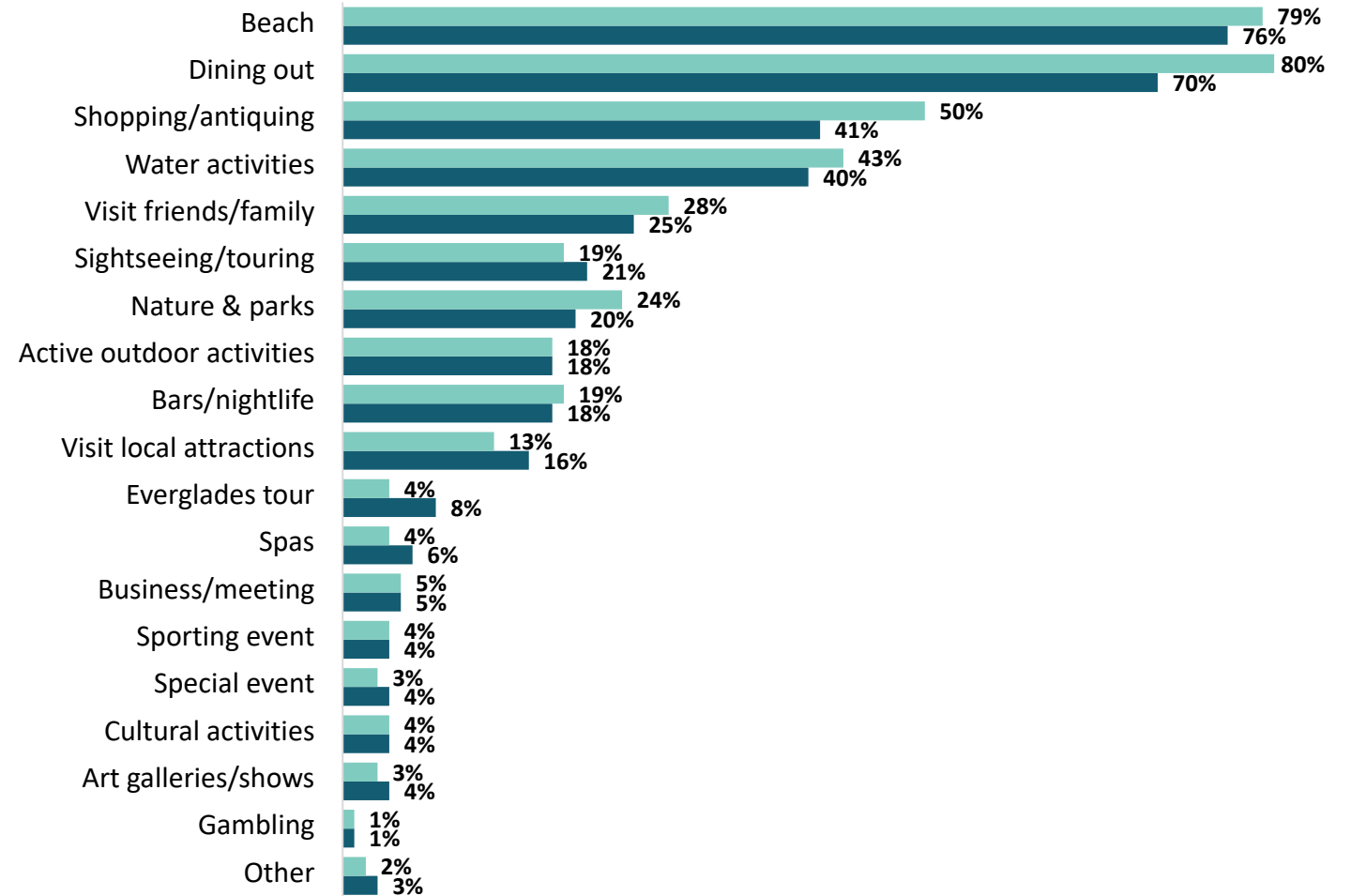
# VISITOR ACTIVITIES<sup>1</sup>



Over 3 in 4 visitors to the Naples, Marco Island, Everglades area went to the beach during their trip



7 in 10 visitors went out to dinner in the Naples, Marco Island, Everglades area during their trip



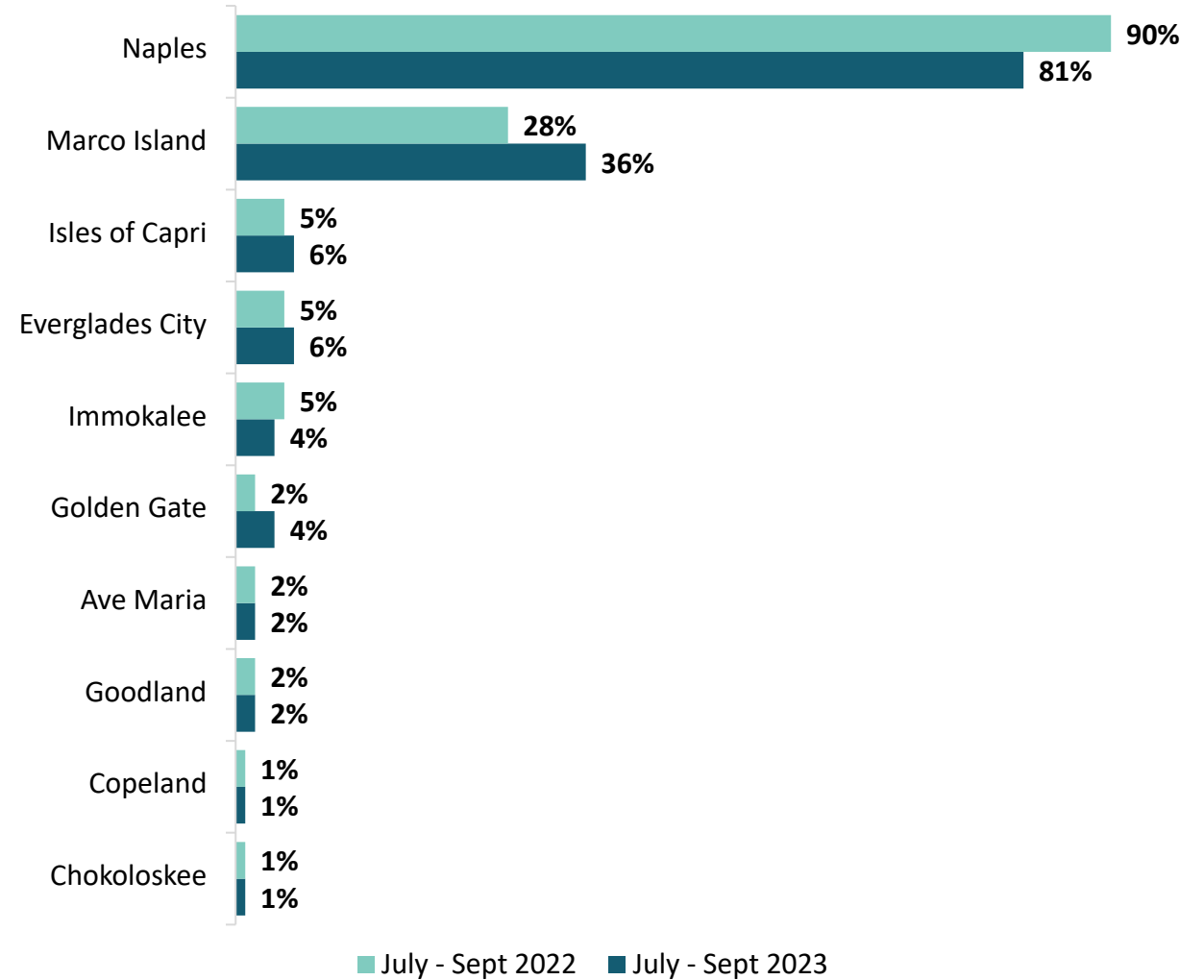
■ July - Sept 2022    ■ July - Sept 2023

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

# AREAS VISITED<sup>1</sup>



Over 4 in 5 Collier County visitors spent time in the Naples area, while over 1 in 3 spent time in the Marco Island area



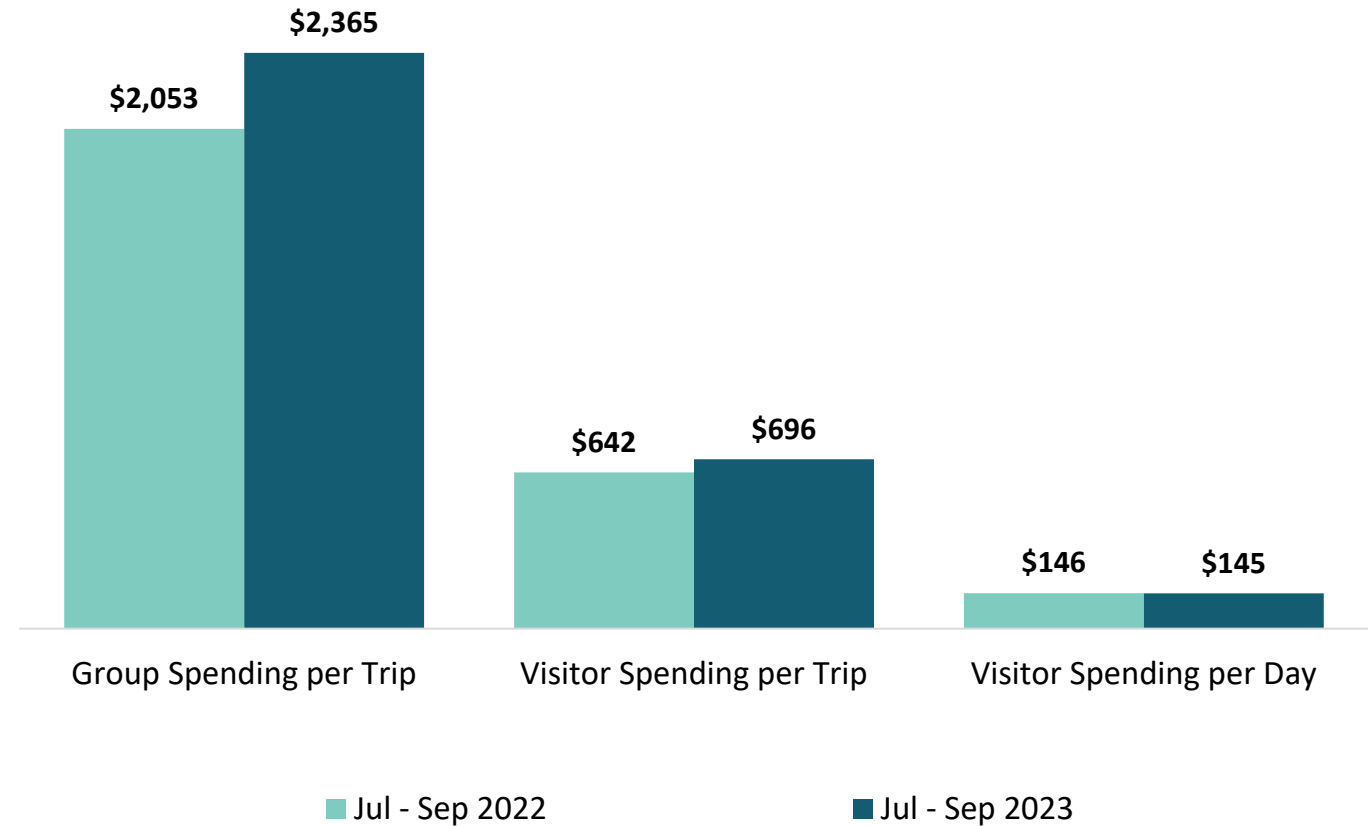
<sup>1</sup>Multiple responses permitted.



# VISITOR SPENDING



Typical travel parties spent \$2,365 per trip with a mean trip length of 4.8 nights and a mean travel party size of 3.4 people



# VISITOR JOURNEY: POST-TRIP EVALUATION



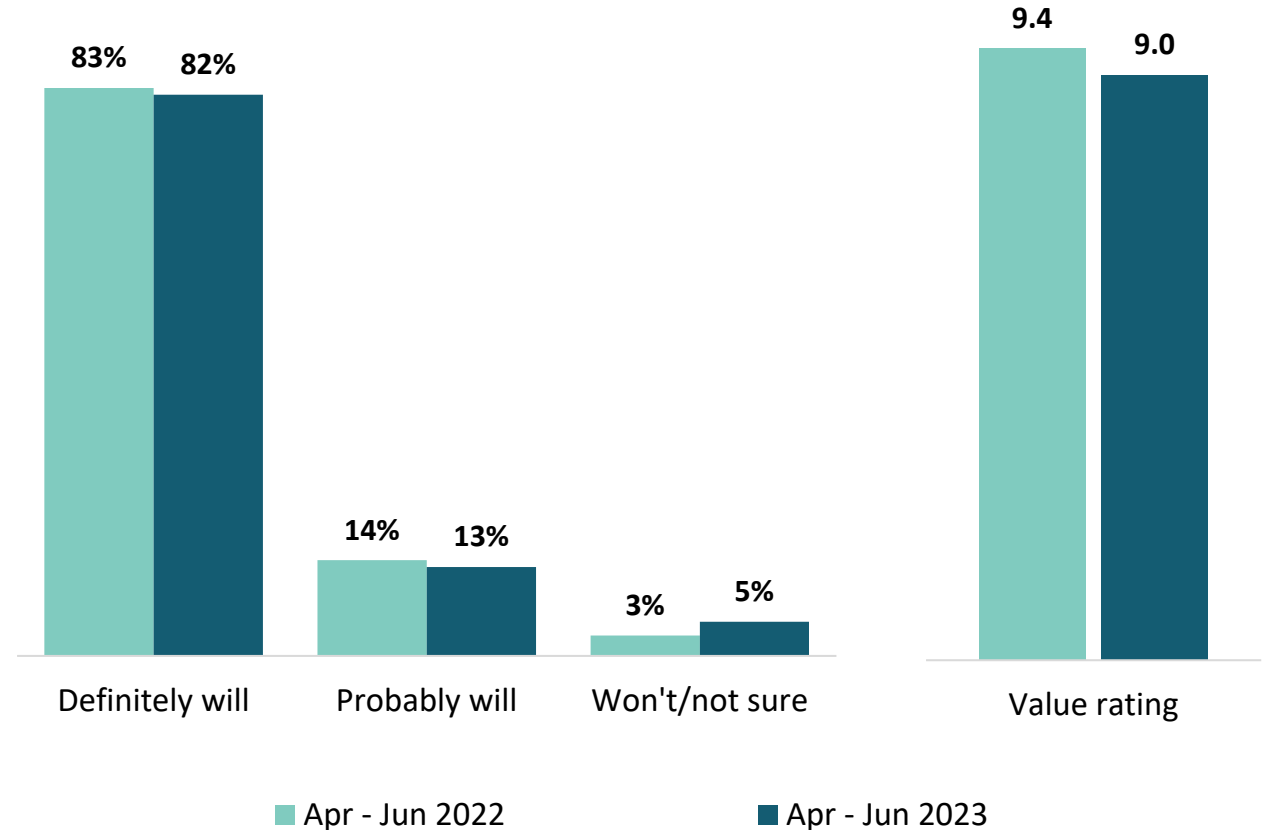
# RECOMMENDING AREA



On a 10-point scale<sup>1</sup>, visitors rate the value of their travel dollar in the Naples, Marco Island, Everglades area at **9.0**, lower than in Q3 2023



Nearly all visitors said they are likely to recommend the Naples, Marco Island, Everglades area as a place to visit or vacation (Over 4 in 5 will definitely recommend)

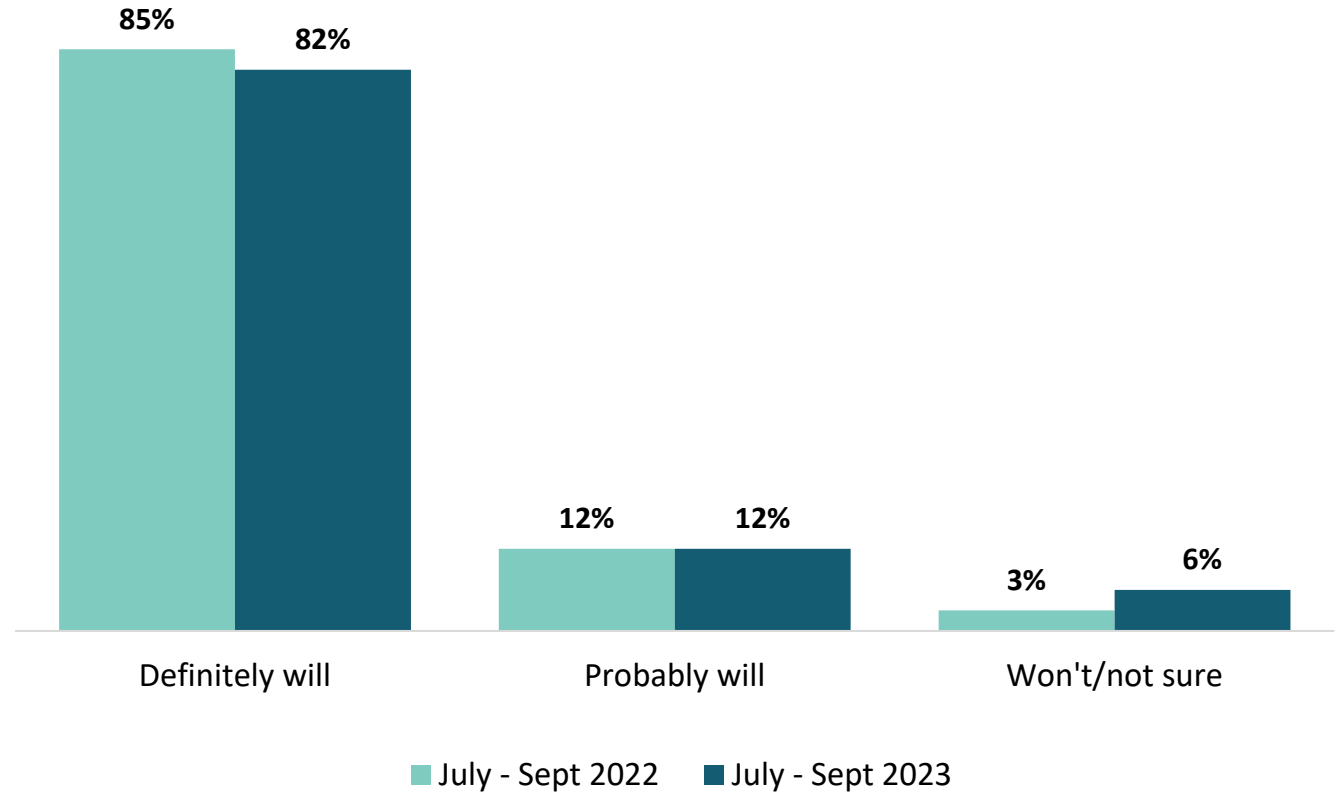


<sup>1</sup> 1 = Poor ; 10 = Excellent

# RETURNING TO AREA



Over 9 in 10 visitors said they are likely to return to the Naples, Marco Island, Everglades area for a future visit or vacation (8 in 10 said they will definitely return)



<sup>1</sup> 1 = Poor ; 10 = Excellent



# DETAILED FINDINGS

# VISITATION & LODGING

	Jul - Sep 2022	Jul - Sep 2023	% Change from 2022
Visitors	705,900	650,500	- 7.8%
Room Nights	565,900	521,900	- 7.8%
Visitor Days	3,122,400	3,114,000	- 0.3%
Direct Spending	\$452,938,400	\$452,464,900	- 0.1%
Economic Impact	\$675,331,200	\$628,021,300	- 7.0%
Occupancy Rate	49.4%	46.6%	- 5.8%
Average Daily Rate	\$230.75	\$240.30	+ 4.1%
Revenue Per Available Room	\$114.05	\$111.89	- 1.9%



■ Q3 2022 ■ Q3 2023

Region of Origin	Jul - Sep 2022	Jul - Sep 2023
Florida	37.3%	28.6%
Southeast	14.5%	14.5%
Northeast	17.1%	19.3%
Midwest	22.3%	23.9%
West	2.5%	3.4%
Canada	2.3%	3.7%
Europe	2.0%	4.9%
UK (England, Scotland, Wales, N. Ireland)	[0.9%]	[1.3%]
Germany	[0.4%]	[1.1%]
Other Europe	[0.7%]	[2.5%]
Central & South America	0.8%	0.9%
Other International	1.2%	0.8%

State of Origin	Jul - Sep 2022	Jul - Sep 2023
Florida	37%	29%
New York	3%	7%
Ohio	8%	6%
Illinois	5%	5%
Texas	4%	5%
New Jersey	3%	4%
Michigan	3%	3%
Virginia	2%	3%
Massachusetts	4%	3%
Indiana	2%	3%
Georgia	3%	3%
Pennsylvania	2%	2%
Kentucky	1%	2%
Tennessee	1%	2%
Missouri	1%	2%



Market of Origin	Jul - Sep 2022	Jul - Sep 2023
Miami – Ft. Lauderdale	13%	14%
New York	5%	10%
Chicago	5%	6%
Cincinnati	3%	4%
Tampa – St. Petersburg	3%	3%
Boston	4%	3%
West Palm Beach – Ft. Pierce	1%	3%
Detroit	2%	2%
Dallas - Ft Worth	2%	2%
Orlando - Daytona Beach – Melbourne	4%	2%
Washington, DC – Hagerstown	2%	2%
Ft. Smith – Fayetteville - Springdale	3%	2%
Cleveland - Akron	4%	2%
Atlanta	2%	2%
Minneapolis - St Paul	1%	2%

Trip Planning Cycle	Jul - Sep 2022	Jul - Sep 2023
A week or less	10%	12%
2 - 4 weeks	21%	19%
1 - 2 months	30%	27%
3 - 4 months	20%	21%
5 - 6 months	9%	11%
7 months - 1 year	6%	8%
More than 1 year	4%	2%

Trip Planning Sources	Jul - Sep 2022	Jul - Sep 2023
Search engines	49%	40%
Talked to friends	25%	25%
Hotel website/app	12%	14%
Vacation rental site	9%	13%
Trip planning website/app	12%	13%
Airline website/app	11%	12%
Booking website/app	10%	11%
Social media	13%	9%
Visitor guides	5%	5%
Collier County CVB	2%	3%
AAA	1%	2%
ParadiseCoast.com	2%	1%
Newspapers/magazines	1%	1%
Deal-based promotion	3%	1%
Printed advertisements	0%	0%
Television advertisements	0%	0%
Other	4%	5%
None	14%	20%

Reasons for Visiting	Jul - Sep 2022	Jul - Sep 2023
Vacation/getaway	73%	71%
Visit friends/family	20%	18%
Special occasion	10%	8%
Business	5%	6%
Sporting event	4%	4%
Special event	4%	3%
Cultural activities	2%	3%
Golf/tennis trip	1%	2%
Fishing trip	1%	1%
Hurricane Recovery	<1%	1%
Other	4%	4%

Destinations Considered	Jul - Sep 2022	Jul - Sep 2023
No other destinations	73%	67%
Fort Myers – Sanibel	8%	14%
Florida Keys	5%	10%
Miami	5%	7%
Sarasota – Bradenton	4%	6%
Clearwater	4%	6%
St. Petersburg	4%	6%
Ft. Lauderdale	2%	4%
West Palm Beach	2%	2%
Other	6%	5%

Reasons for Choosing Area	July - Sept 2022	July - Sept 2023
Beaches	61%	54%
Quiet/relaxing	52%	36%
Family-friendly destination	32%	26%
Previous experience	35%	26%
Friends/family live here	23%	24%
Not crowded	35%	18%
Restaurants	17%	16%
Recommendation	10%	15%
Quality of accommodations	13%	12%
Meeting/event hosted here	12%	11%
Trying something new	8%	10%
Shopping	12%	9%
Deal/promotion	3%	3%
Wellness	4%	3%
Appealing advertisements	1%	2%
Golf	2%	2%
Other	6%	5%

Types of Transportation	Jul - Sep 2022	Jul - Sep 2023
Fly	43%	54%
Drive	56%	46%

Airports of Deplanement	Jul - Sep 2022	Jul - Sep 2023
SWFL Intl Airport	76%	76%
Miami Intl Airport	8%	7%
Ft. Lauderdale Intl Airport	6%	5%
Orlando Intl Airport	5%	5%
Punta Gorda Airport	2%	3%
Palm Beach Intl Airport	0%	1%
Tampa Intl Airport	1%	1%
Naples Airport	0%	0%
Sarasota/Bradenton Intl Airport	1%	0%
St. Pete - Clearwater Intl Airport	0%	0%
Other	1%	2%

Pre-Visit Advertising	Jul - Sep 2022	Jul - Sep 2023
Recalled advertising	16%	23%
Influenced by advertising	9%	12%

Advertising Sources <sup>1</sup>	Jul - Sep 2022	Jul - Sep 2023
Social media	49%	50%
Online article	23%	21%
Visitor guide	22%	17%
Online travel reviews	20%	17%
Website advertisement	9%	13%
Newspaper/magazine	7%	9%
Cable/satellite TV	5%	8%
Rental agency	5%	8%
YouTube	5%	7%
Brochure	3%	6%
TV streaming service	5%	4%
Billboard	4%	3%
Music streaming service	1%	1%
Radio	0%	1%
Deal-based promotion	2%	1%
Podcast	<1%	<1%
Other	4%	4%

<sup>1</sup>Percentages are based on the % of visitors who recalled advertising.



Travel Party Composition	Jul - Sep 2022	Jul - Sep 2023
Solo	10%	11%
As a couple	40%	30%
With family	41%	49%
Other couples/friends	8%	9%
Other	1%	1%

Travel Party Attributes	Jul - Sep 2022	Jul - Sep 2023
Average Travel Party Size	3.2	3.6
Traveled with Children	39%	39%

Previous Visits	Jul - Sep 2022	Jul - Sep 2023
This is my first time	24%	31%
2 - 5 times	35%	32%
6 - 10 times	17%	12%
11+ times	24%	25%

Age	Jul - Sep 2022	Jul - Sep 2023
18 – 24	5%	6%
25 – 34	11%	13%
35 – 49	49%	40%
50 – 65	29%	33%
Over 65	6%	8%
Median Age	45	47

Gender	Jul - Sep 2022	Jul - Sep 2023
Male	49%	43%
Female	51%	57%

<sup>1</sup> Of travel party member who responded to survey. Females are generally more likely to respond to surveys.

Race	Jul - Sep 2022	Jul - Sep 2023
White/Caucasian	77%	80%
Hispanic/Latino	15%	12%
Black/African American	5%	4%
Asian/Pacific Islander	2%	2%
Native/Indigenous	0%	1%
Another race/ethnicity	1%	1%

Household Income	Jul - Sep 2022	Jul - Sep 2023
Less than \$75,000	10%	11%
\$75,000 - \$99,999	15%	15%
\$100,000 - \$149,999	33%	26%
\$150,000 - \$199,999	22%	19%
\$200,000 - \$249,999	6%	9%
Over \$250,000	14%	20%
<b>Median Household Income</b>	<b>\$137,900</b>	<b>\$146,200</b>

Nights Stayed	Jul - Sep 2022	Jul - Sep 2023
Did not stay overnight	18%	13%
1 - 2 nights	17%	14%
3 - 4 nights	30%	28%
5+ nights	35%	45%
Average Length of Stay	4.4	4.8

Trip Activities	Jul - Sep 2022	Jul - Sep 2023
Beach	79%	76%
Dining out	80%	70%
Shopping/antiquing	50%	41%
Water activities	43%	40%
Visit friends/family	28%	25%
Sightseeing/touring	19%	21%
Nature & parks	24%	20%
Bars/nightlife	19%	18%
Active outdoor activities	18%	18%
Visit local attractions	13%	16%
Everglades tour	4%	8%
Spas	4%	6%
Business/meeting	5%	5%
Art galleries/shows	3%	4%
Cultural activities	4%	4%
Special event	3%	4%
Sporting event	4%	4%
Gambling	1%	1%
Other	3%	2%

Areas Visited	Jul - Sep 2022	Jul - Sep 2023
Naples	90%	81%
Marco Island	28%	36%
Everglades City	5%	6%
Isles of Capri	5%	6%
Golden Gate	2%	4%
Immokalee	5%	4%
Goodland	2%	2%
Ave Maria	2%	2%
Chokoloskee	1%	1%
Copeland	1%	1%

Trip Spending	Jul - Sep 2022	Jul - Sep 2023
Total Travel Party Spending	\$2,053	\$2,365
Visitor Spending per Trip	\$642	\$696
Visitor Spending per Day	\$146	\$145

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Recommending area	Jul - Sep 2022	Jul - Sep 2023
Definitely will recommend	83%	82%
Probably will recommend	14%	13%
Probably will not recommend	1%	3%
Definitely will not recommend	0%	1%
Not sure	2%	1%

Returning to area	Jul - Sep 2022	Jul - Sep 2023
Definitely will return	85%	82%
Probably will return	12%	12%
Probably will not return	1%	3%
Definitely will not return	0%	1%
Not sure	2%	2%

Value rating	Jul - Sep 2022	Jul - Sep 2023
Value of travel dollar	9.4	9.0



# NAPLES, MARCO ISLAND, EVERGLADES CVB

July - Sept 2023 Quarterly Report

*John Melleky, Arts & Culture Manager*  
*john.melleky@colliercountyfl.gov*

*Sandra Rios, Public Relations & Communications Manager*  
*sandra.rios@colliercountyfl.gov*

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

