NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau
July 2022 Monthly Dashboard

NAPLES · MARCO ISLAND
EVERGLADES
FLORIDA'S PARADISE COAST

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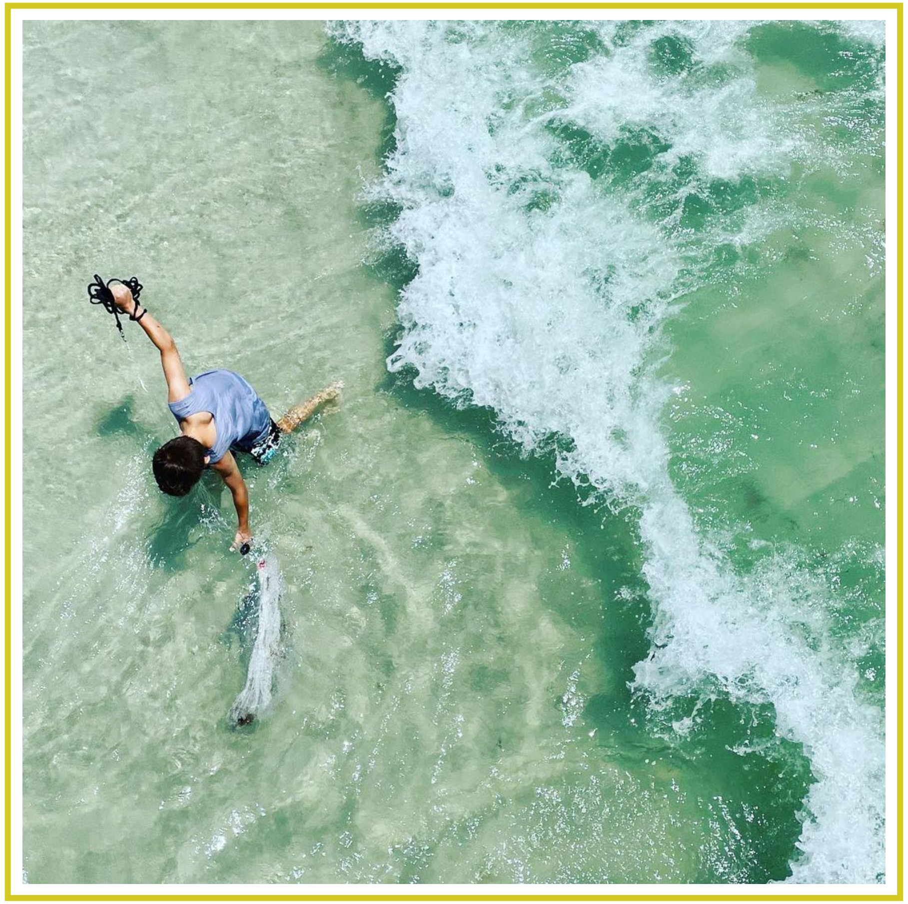
MONTHLY SNAPSHOT

- Compared to July 2021, Collier County saw larger travel parties, longer trip lengths, and gains in visitor spending categories resulting in about the same number of visitors but an increase in visitor spending

- Looking ahead to the next 3 months, reservations are still down for nearly 3 out of 4 accommodations providers in Collier County. Contributing factors continue to be unsustainable increases in demand during 2021, a potential recession, gas prices and inflation which, although dropping, are still much higher than normal, as well as the increased cost of airfare.

- For a second month in a row, the perceived value of a Collier County vacation reached the highest levels since the question was introduced in October 2021.



JULY 2022 LODGING METRICS*

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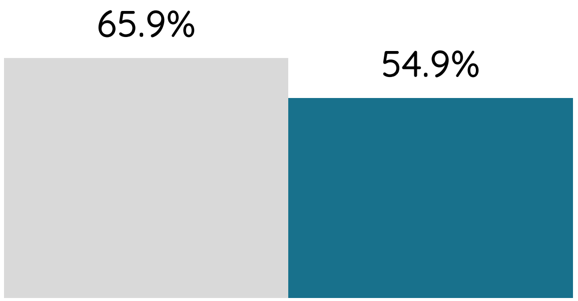
EVERGLADES
FLORIDA'S PARADISE COAST

OCCUPANCY RATE

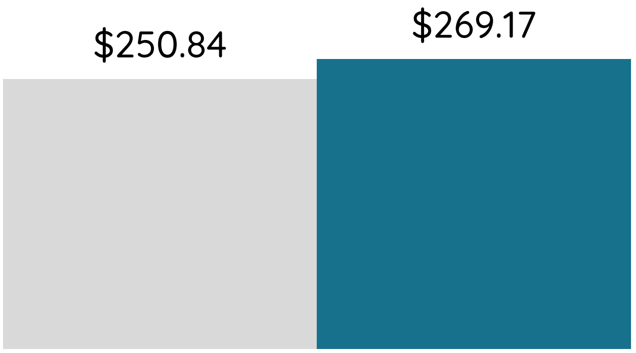
54.9%



- 16.7% from 2021

AVERAGE DAILY RATE

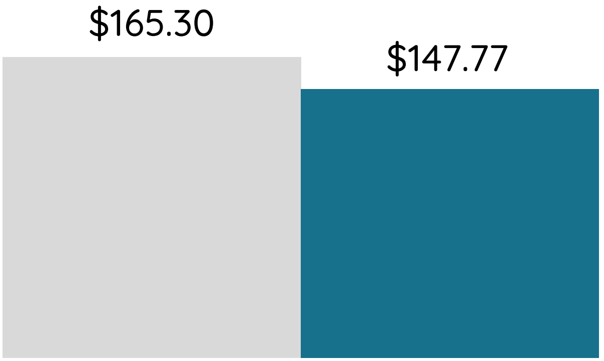
$269.17



+ 7.3% from 2021

REVENUE PER AVAILABLE ROOM

$147.77



- 10.6% from 2021

July-21 July-22

* Visitors staying in paid accommodations.

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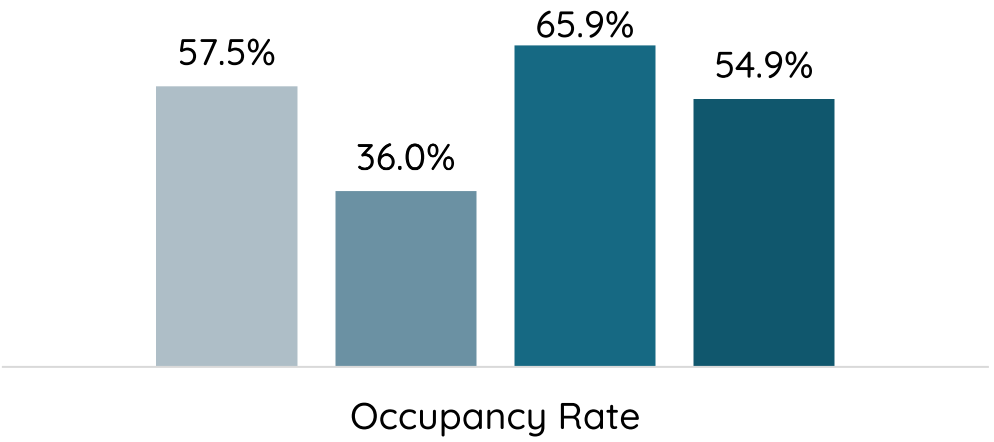
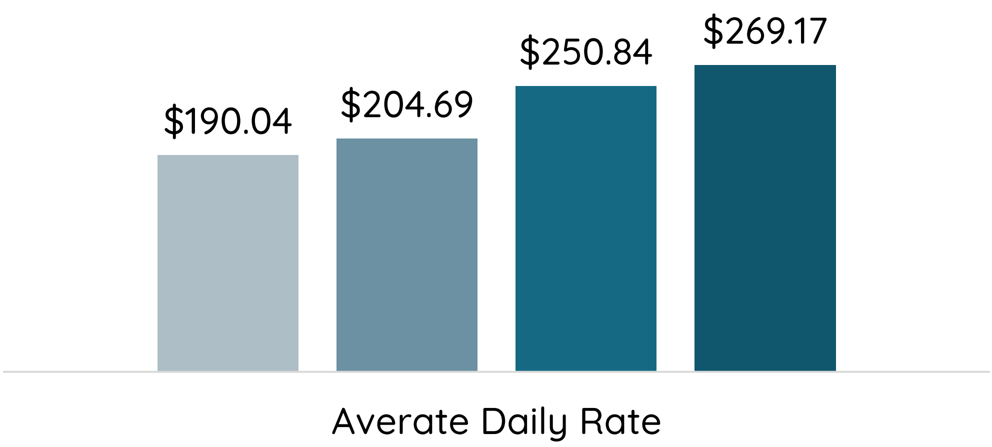
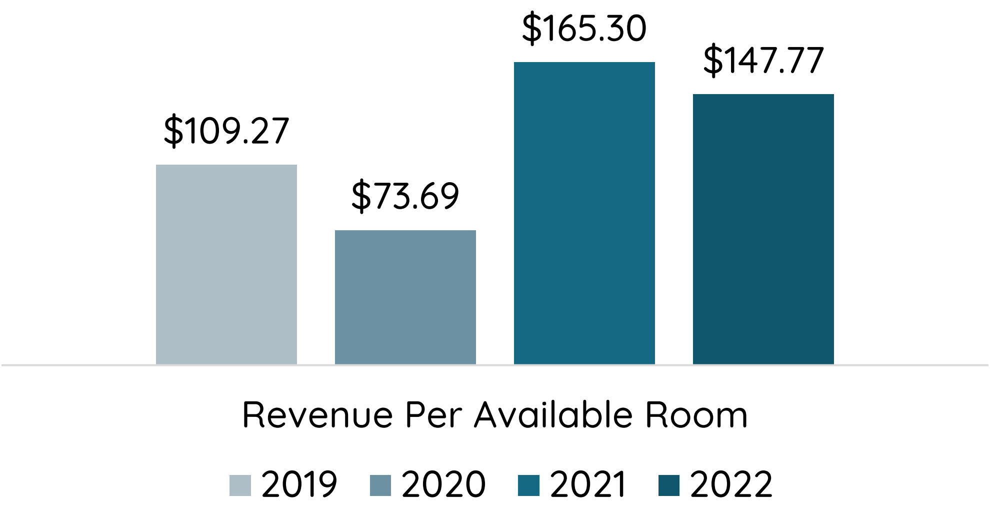
JULY 2019–2022 LODGING METRICS*

NAPLES · MARCO ISLAND
EVERGLADES
FLORIDA'S PARADISE COAST







* Visitors staying in paid accommodations.

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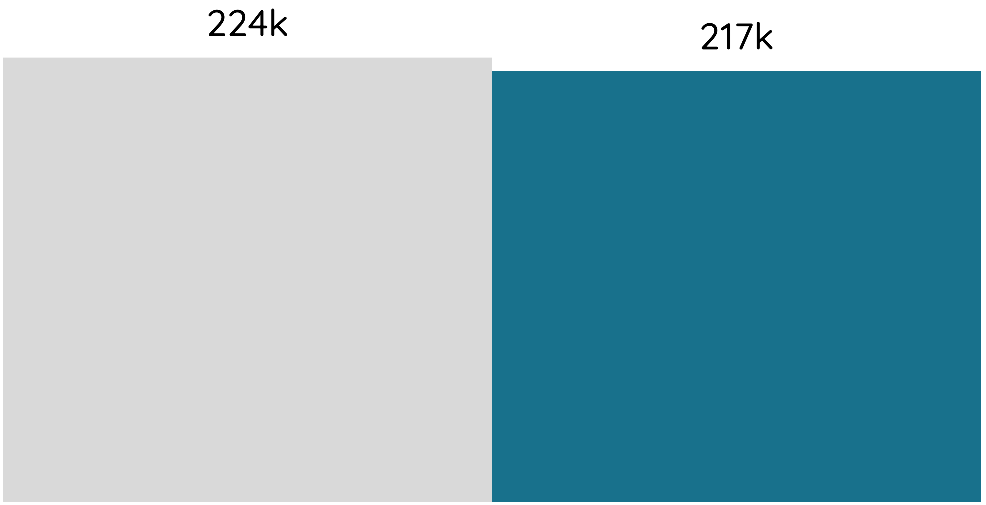
JULY 2022 VISITATION & ROOM NIGHTS*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

VISITORS
161,600

+ 0.7% from 2021

ROOM NIGHTS**
217,000



- 3.0% from 2021

July-21 July-22

*Visitors staying in paid accommodations.
**More rental units available in 2022

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JULY 2022 SPENDING & ECONOMIC IMPACT*

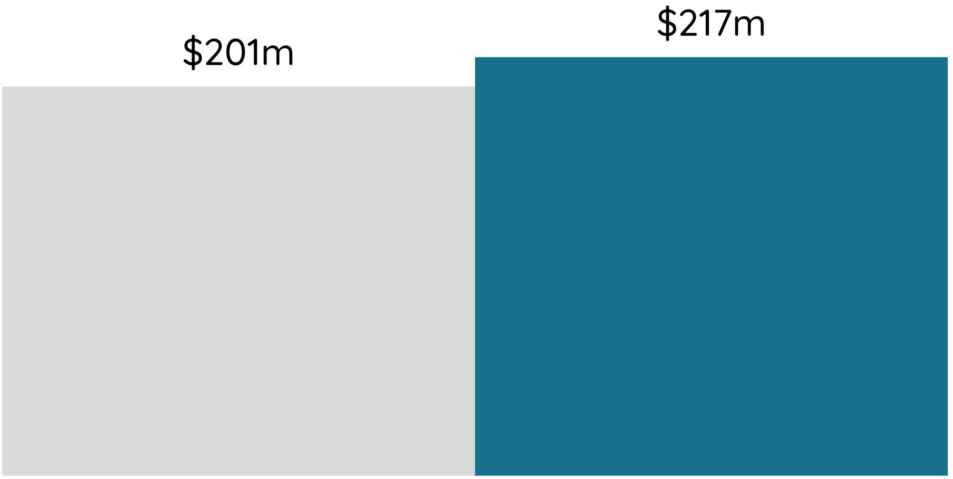
DIRECT SPENDING

$145,205,000

+ 7.5% from 2021

ECONOMIC IMPACT

$216,500,700



+ 7.5% from 2021

July-21 July-22

* Visitors staying in paid accommodations.

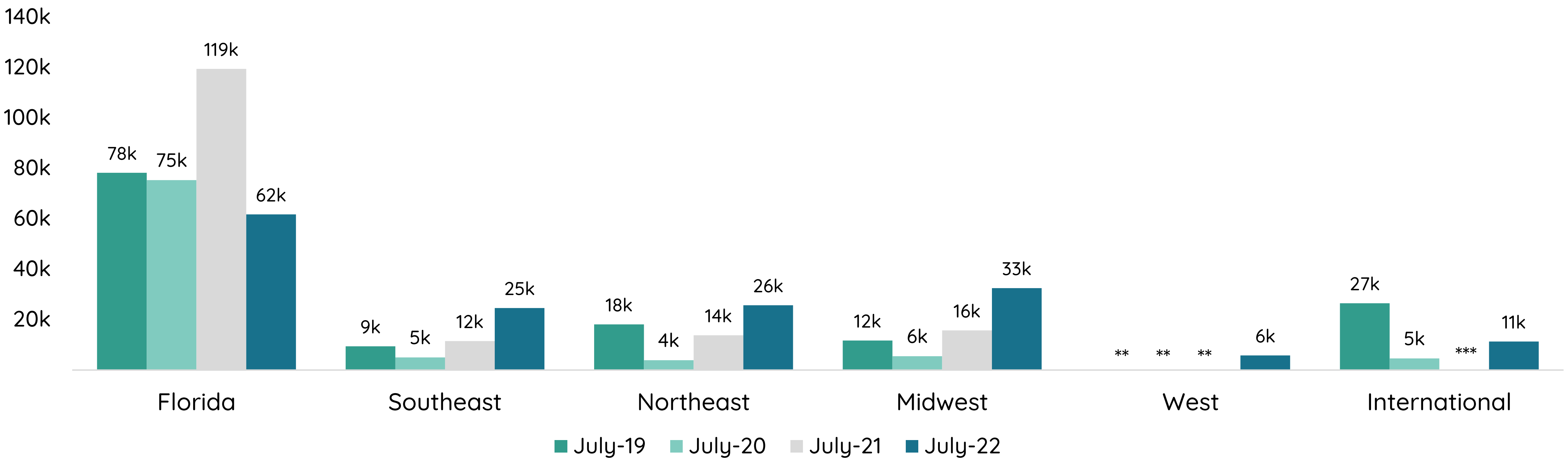
VISITOR ORIGIN*

FLORIDA VISITORS

61,700

OUT-OF-STATE VISITORS

99,900



* Visitors staying in paid accommodations.
** Visitation from western U.S. states not separated from "other" category in July 2021.
*** Visitation from international markets was too small to estimate for most of 2020 and 2021.

CUMULATIVE VISITATION & ROOM NIGHTS*

NAPLES · MARCO ISLAND
EVERGLADES
FLORIDA'S PARADISE COAST

CYTD VISITORS

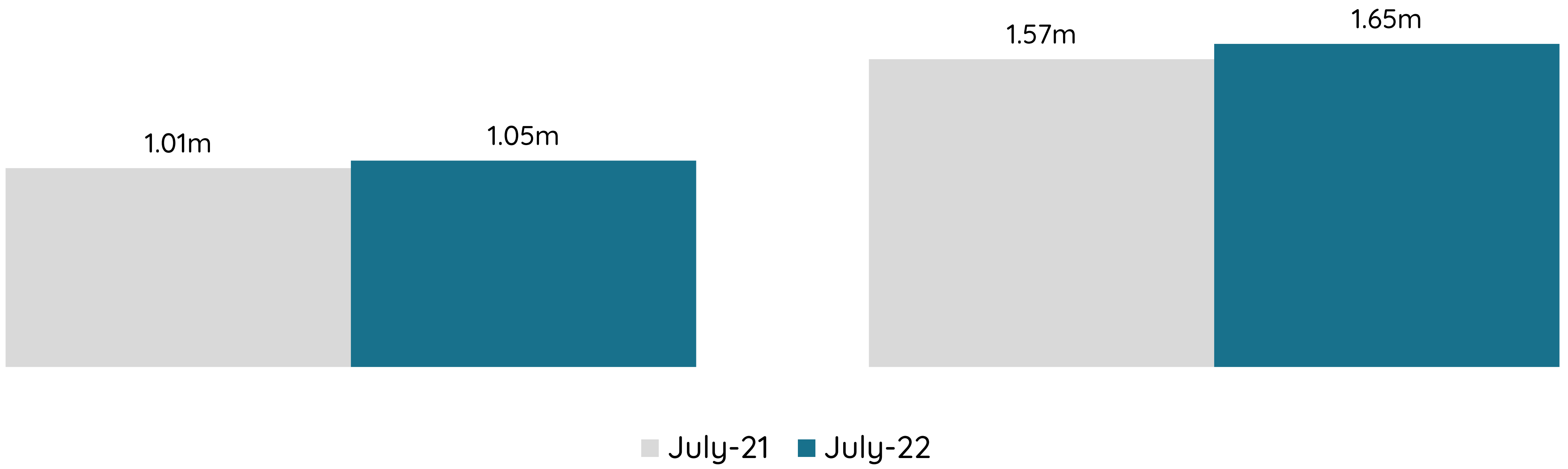
1,051,400

+ 3.8% from 2021

CYTD ROOM NIGHTS

1,645,500

+ 4.9% from 2021



* Visitors staying in paid accommodations.

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CUMULATIVE SPENDING & ECONOMIC IMPACT*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

CYTD DIRECT SPENDING

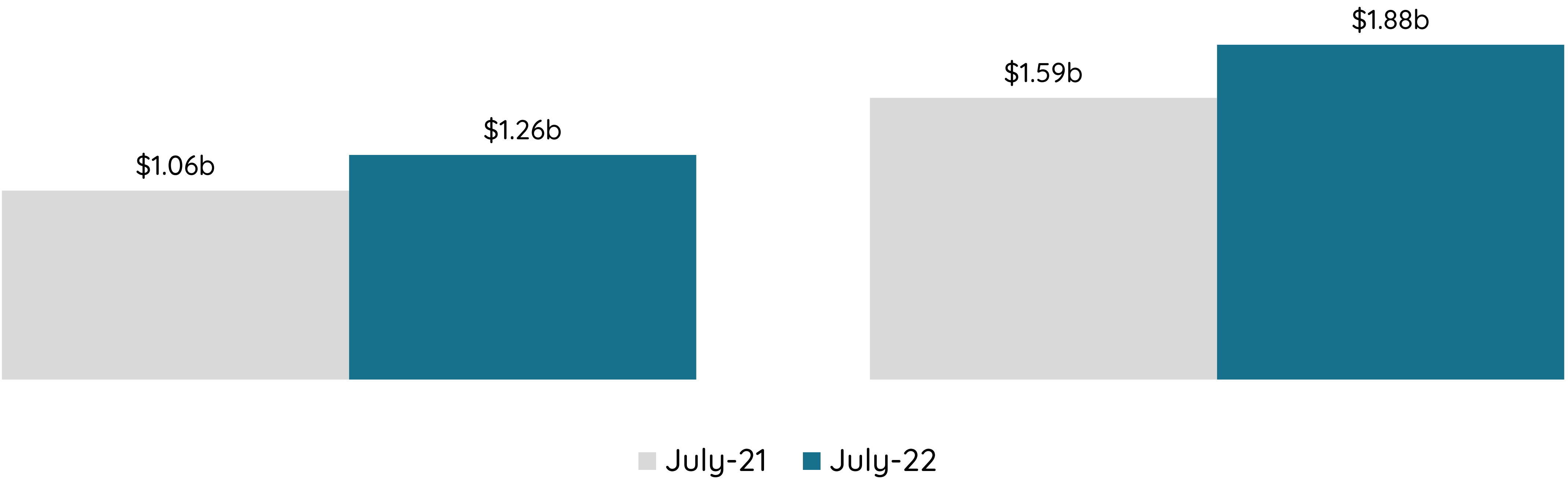
$1,258,684,700

+ 18.2% from 2021

CYTD ECONOMIC IMPACT

$1,876,699,000

+ 18.2% from 2021



* Visitors staying in paid accommodations.

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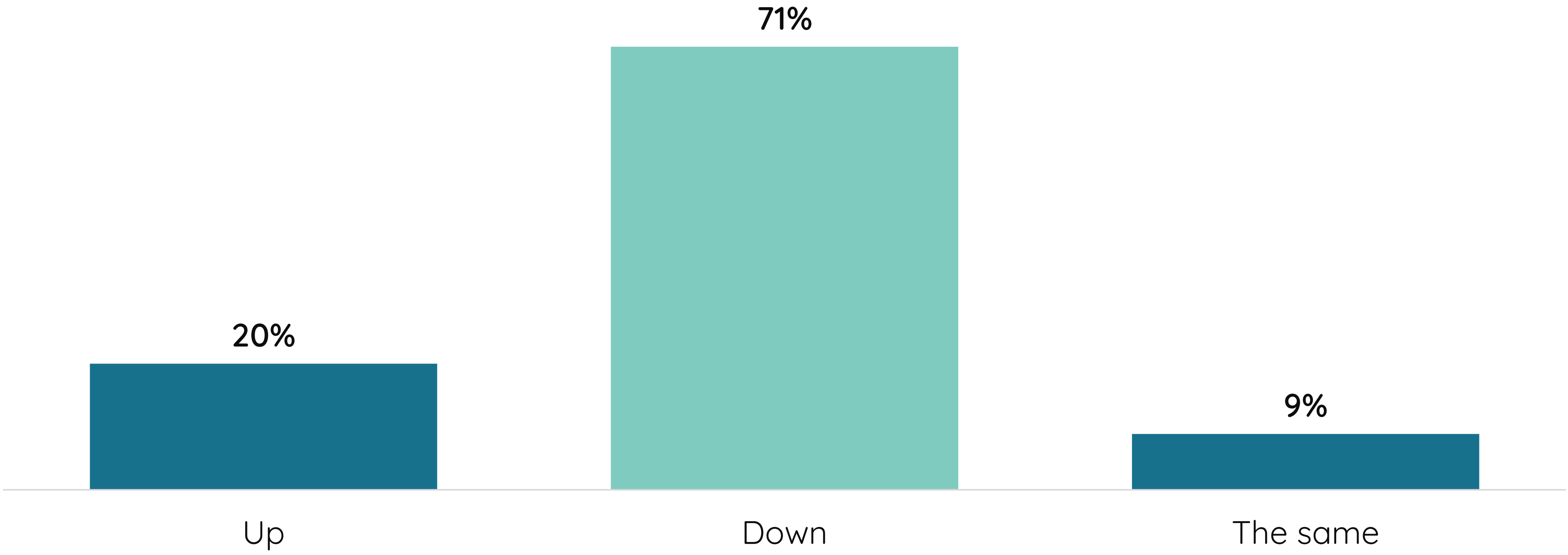
OCCUPANCY BAROMETER

NAPLES · MARCO ISLAND EVERGLADES
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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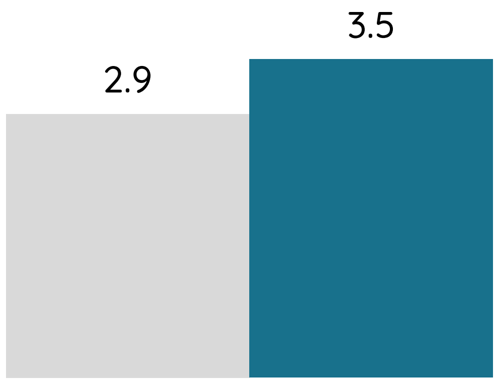
TRIP CHARACTERISTICS*

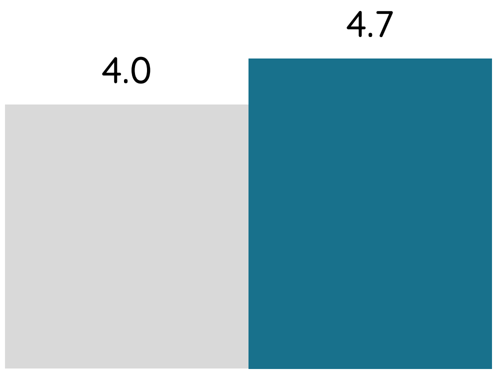
TRAVEL PARTY SIZE

3.5



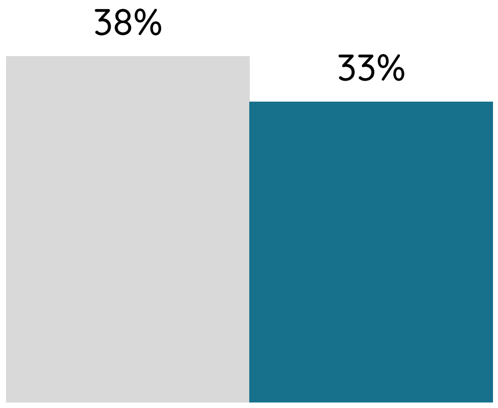
NIGHTS STAYED

4.7



1ST TIME VISITORS

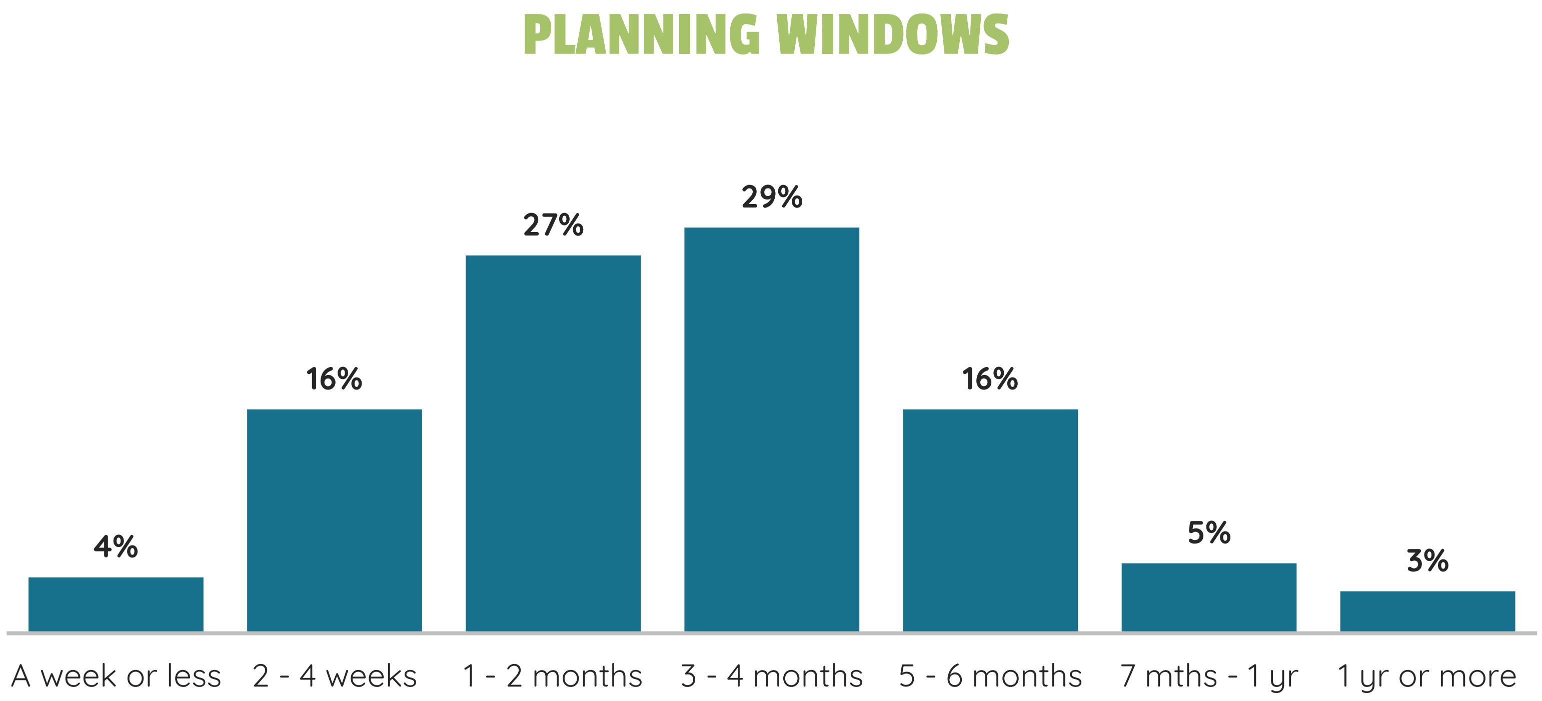
33%

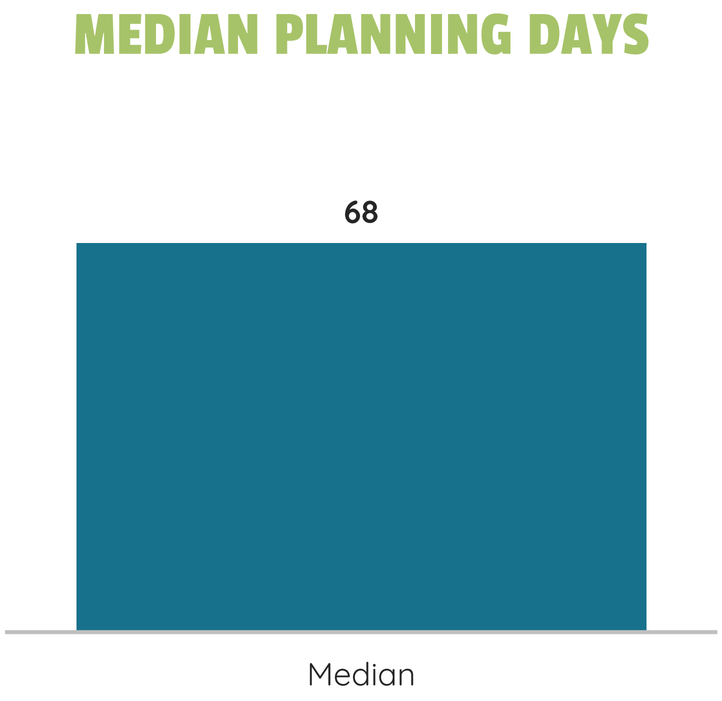


July-21 July-22

* Visitors staying in paid accommodations.

TRIP PLANNING CYCLE*

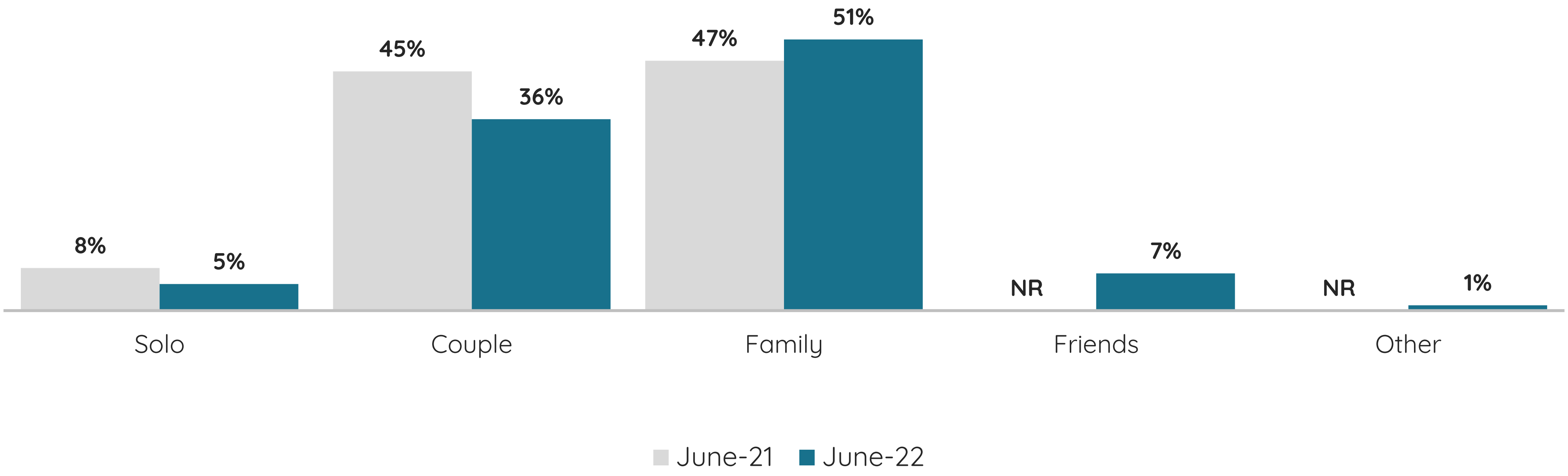




* Visitors staying in paid accommodations.

TRAVEL PARTIES*

TRAVEL PARTY COMPOSITION



* Visitors staying in paid accommodations.

DECISIONS TO VISIT*

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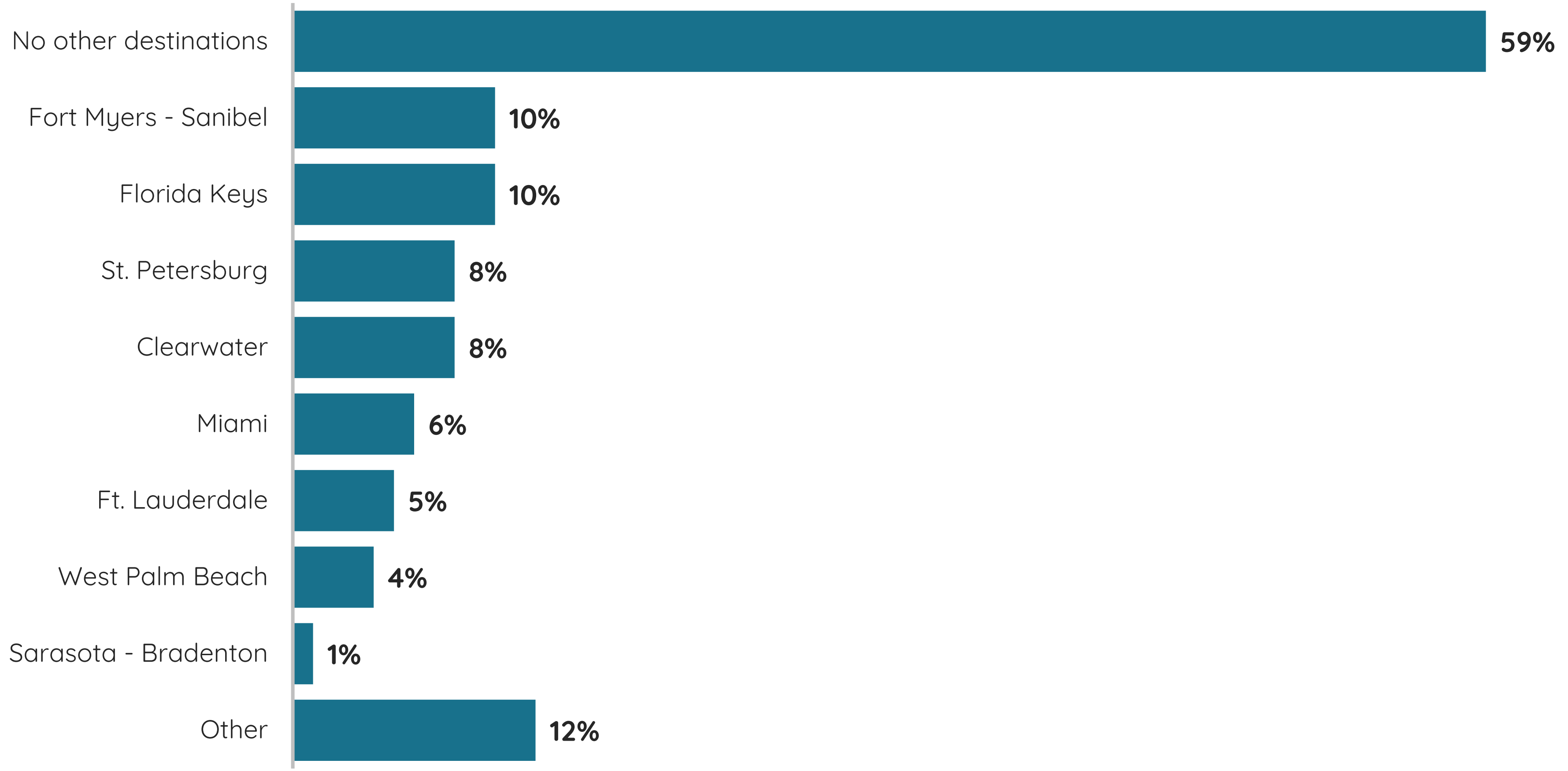
FLORIDA'S PARADISE COAST

OTHER DESTINATIONS CONSIDERED[1]



[1] Multiple responses permitted.
* Visitors staying in paid accommodations.

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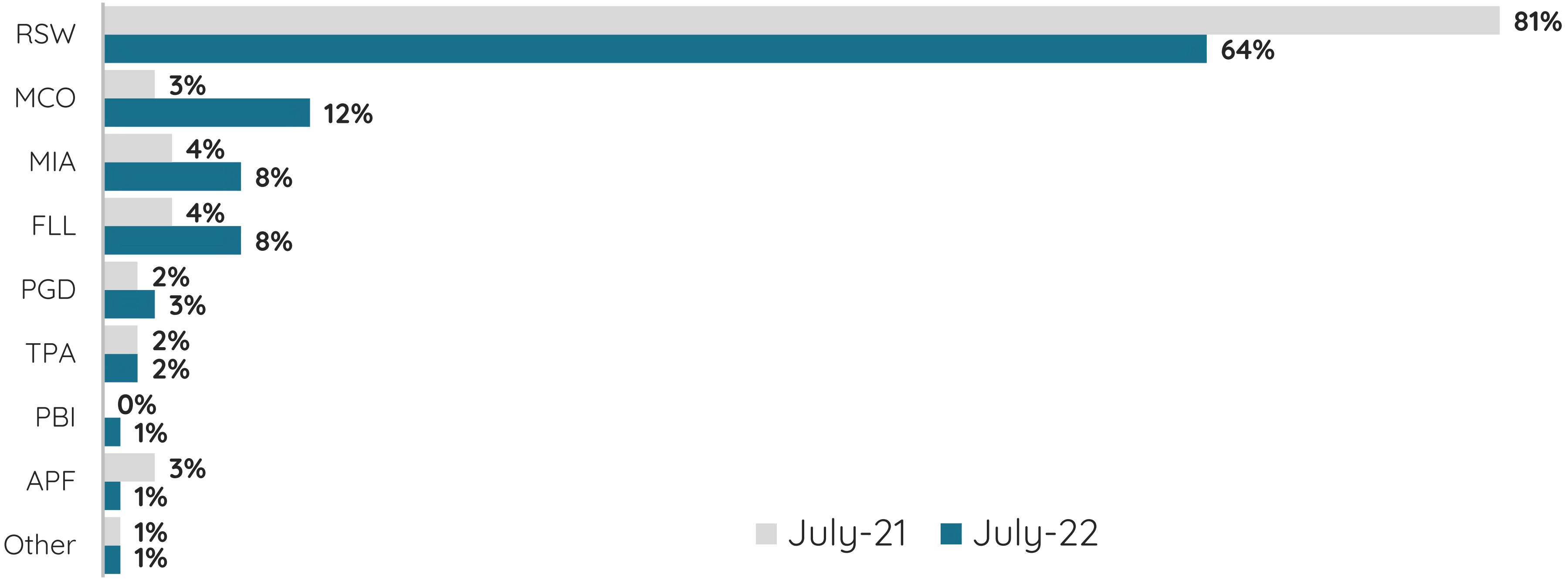
TRANSPORTATION METHODS*



* Visitors staying in paid accommodations.

TYPE OF ACCOMMODATIONS*

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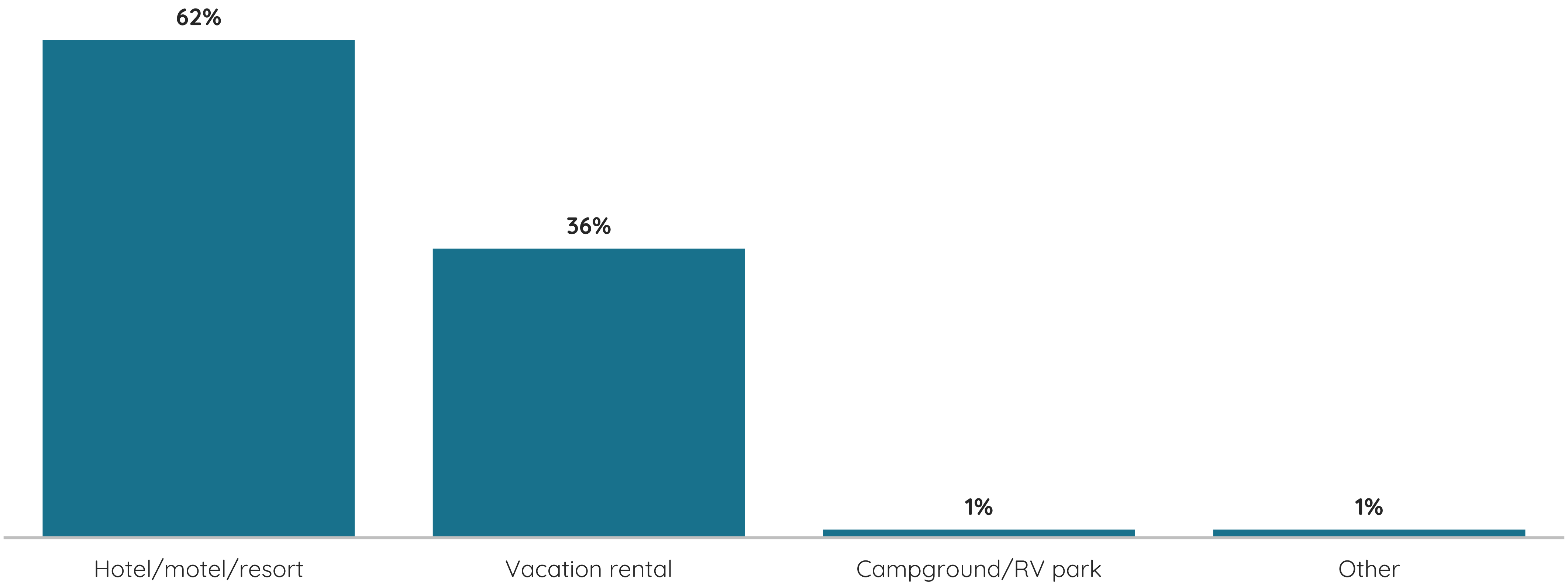
FLORIDA'S PARADISE COAST



* Visitors staying in paid accommodations.

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TRIP EVALUATIONS*

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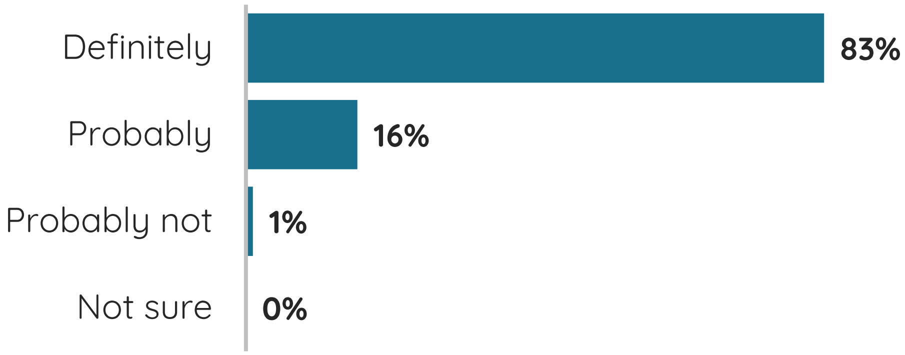
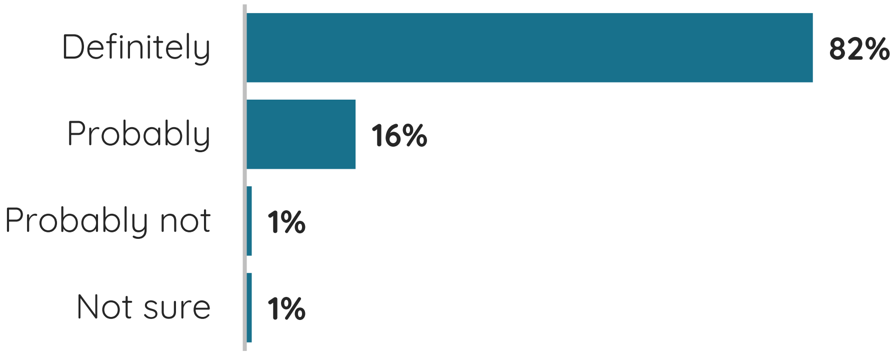
FLORIDA'S PARADISE COAST

WOULD RECOMMEND THE AREA?



WILL RETURN TO THE AREA?



VALUE FOR TRAVEL DOLLAR**

* Visitors staying in paid accommodations.
** 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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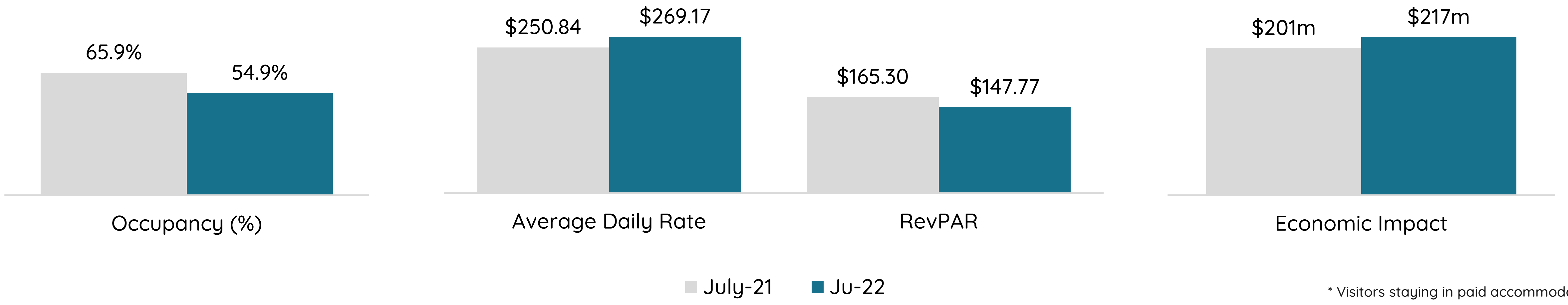
JULY 2022 METRICS

JULY 2022 OVERNIGHT VISITATION & LODGING*

NAPLES • MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

	July 2021	July 2022	% Change from 2021
Occupancy Rate	65.9%	54.9%	– 16.7%
Average Daily Rate	$250.84	$269.17	+ 7.3%
RevPAR	$165.30	$147.77	– 10.6%

	July 2021	July 2022	% Change from 2021
Visitors	160,400	161,600	+ 0.7%
Room Nights	223,700	217,000	– 3.0%
Direct Spending	$135,056,600	$145,205,000	+ 7.5%
Economic Impact	$201,369,400	$216,500,700	+ 7.5%



* Visitors staying in paid accommodations.

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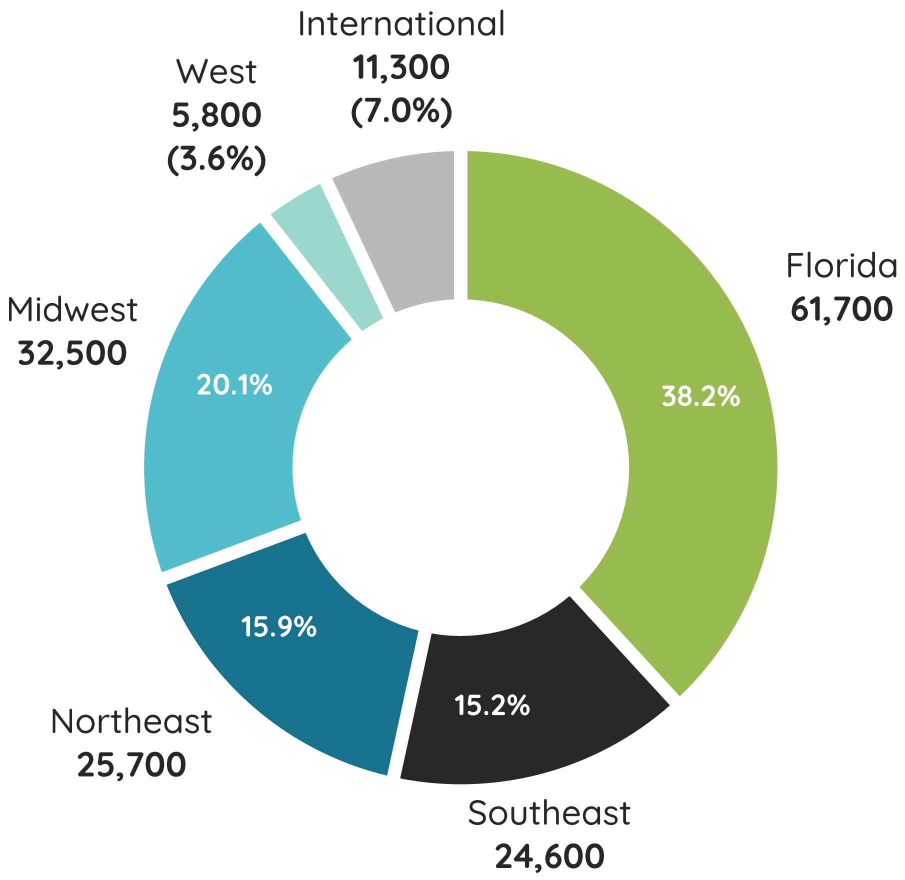
JULY 2022 OVERNIGHT VISITOR ORIGIN MARKETS*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

	July 2021		July 2022		Percent Change (Δ%)	
Region	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	119,400	74.4%	61,700	38.2%	- 48.3%	- 48.7%
Southeast	11,500	7.2%	24,600	15.2%	+ 113.9%	+ 111.1%
Northeast	13,800	8.6%	25,700	15.9%	+ 86.2%	+ 84.9%
Midwest	15,700	9.8%	32,500	20.1%	+ 107.0%	+ 105.1%
West[1]	-	-	5,800	3.6%	–	–
Canada[2]	-	-	3,200	2.0%	–	–
Europe[2]	-	-	4,800	3.0%	–	–
C/S America[2]	-	-	2,400	1.5%	–	–
Other	-	-	900	0.5%	–	–
Total	160,400	100.0%	161,600	100.0%		

[1] Visitation from western U.S. states not separated from "other" category in July 2021.
[2] Visitation from international markets was too small to estimate for most of 2020 and 2021.



* Visitors staying in paid accommodations.

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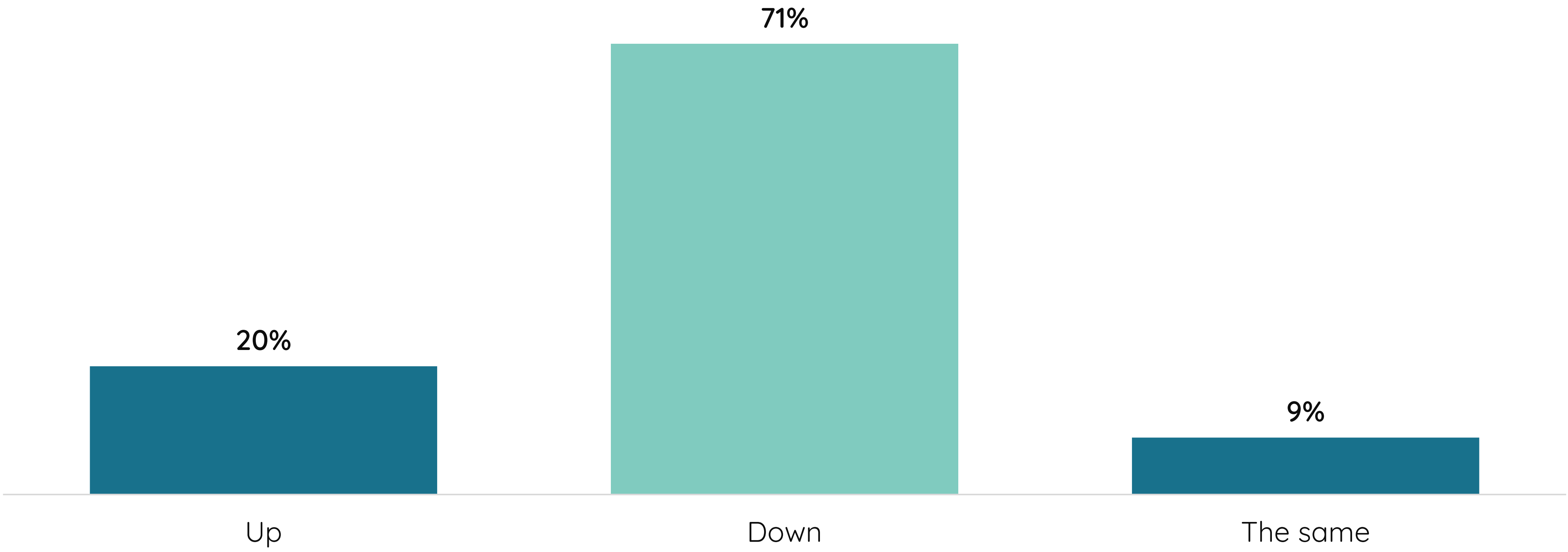
OCCUPANCY BAROMETER

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

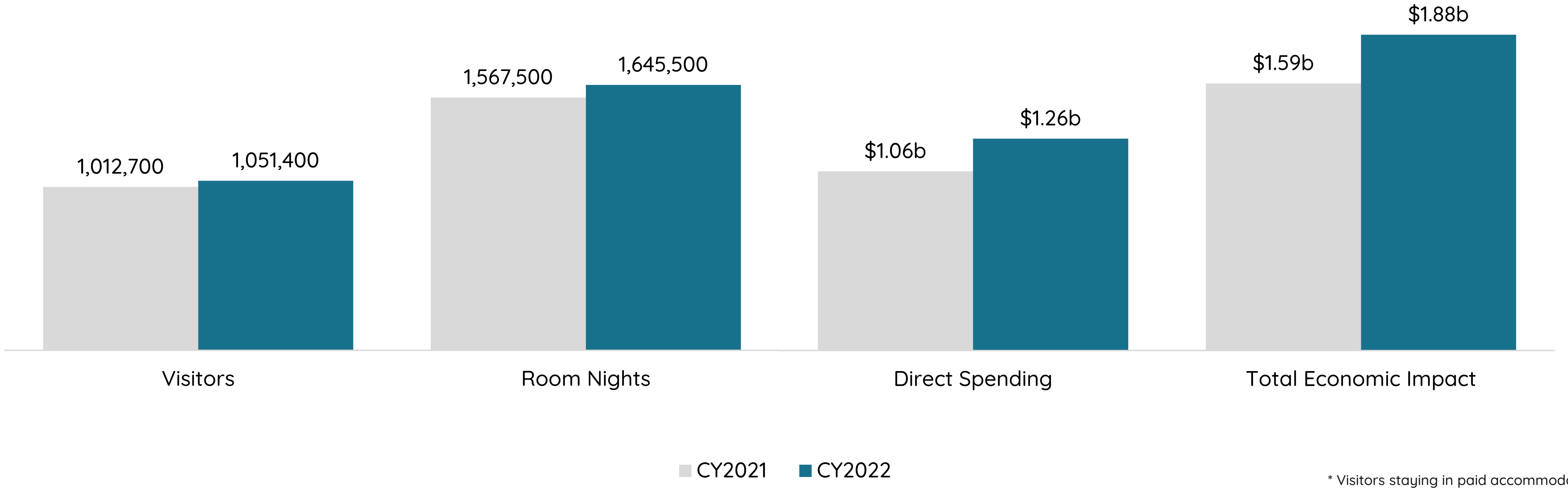


CALENDAR YEAR-TO-DATE METRICS

CYTD OVERNIGHT VISITATION & LODGING*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

	CYTD 2021	CYTD 2022	% Change from 2021
Visitors	1,012,700	1,051,400	+3.8%
Room Nights	1,567,500	1,645,500	+5.0%
Direct Spending	$1,064,706,800	$1,258,684,700	+18.2%
Economic Impact	$1,587,477,900	$1,876,699,000	+18.2%



* Visitors staying in paid accommodations.

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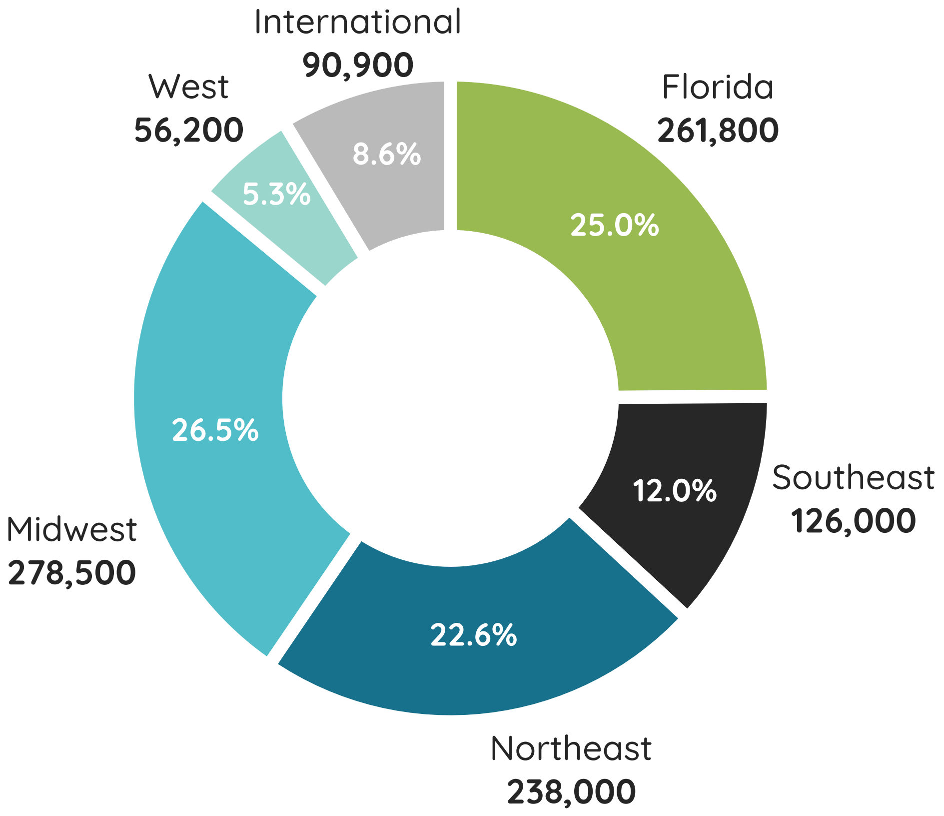
CYTD OVERNIGHT VISITOR ORIGIN MARKETS*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

	CY2021		CY2022		Percent Change (Δ%)	
Region	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	539,500	53.2%	261,800	25.0%	- 51.5%	- 53.0%
Southeast	83,000	8.2%	126,000	12.0%	+ 51.8%	+ 46.3%
Northeast	202,200	20.0%	238,000	22.6%	+ 17.7%	+ 13.0%
Midwest	172,000	17.0%	278,500	26.5%	+ 61.9%	+ 55.9%
West[1]	-	-	56,200	5.3%	-	-
Canada[2]	2,900	0.3%	24,900	2.4%	+ 758.6%	+ 700.0%
Europe[2]	13,100	1.3%	43,600	4.1%	+ 232.8%	+ 215.4%
C/S America[2]	-	-	11,700	1.1%	-	-
Other	-	-	10,700	1.0%	-	-
Total	1,012,700	100.0%	1,051,400	100.0%		

[1] Visitation from western U.S. states not separated from "other" category for most of 2021.
[2] Visitation from international markets was too small to estimate for most of 2020 and 2021.



* Visitors staying in paid accommodations.

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JULY 2022 VISITOR PROFILE

OF OVERNIGHT VISITORS

TRIP PLANNING CYCLE*

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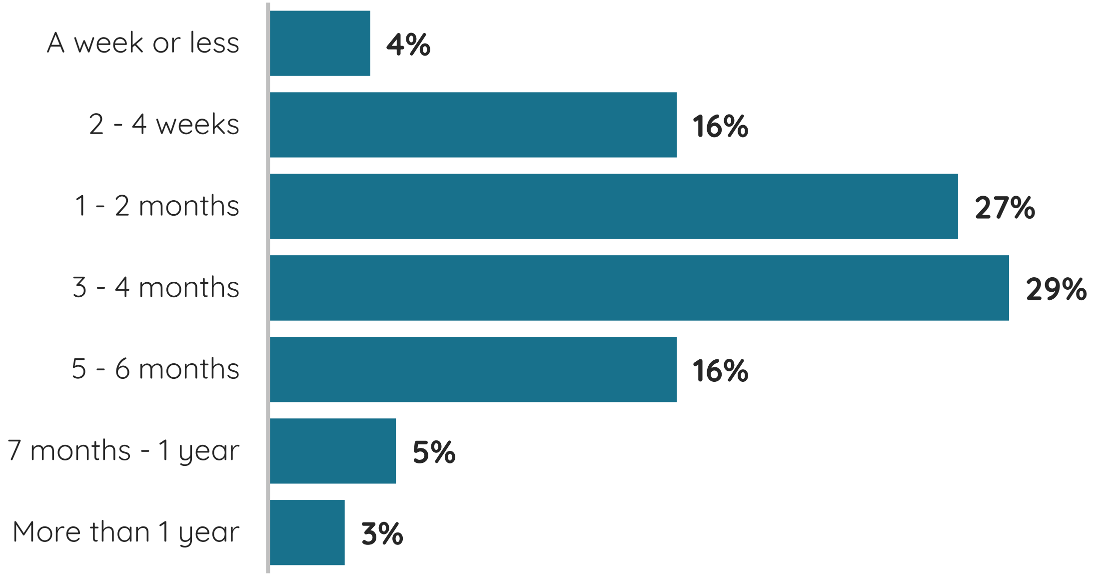
FLORIDA'S PARADISE COAST

Trip Planning Cycle			
	July-21	July-22	Trend
A week or less	-	4%	-
2 - 4 weeks	-	16%	-
1 - 2 months	-	27%	-
3 - 4 months	-	29%	-
5 - 6 months	-	16%	-
7 months – 1 year	-	5%	-
More than 1 year	-	3%	-
Median (days)	**-**	**68**	**-**

[1] Multiple responses permitted.



* Visitors staying in paid accommodations.

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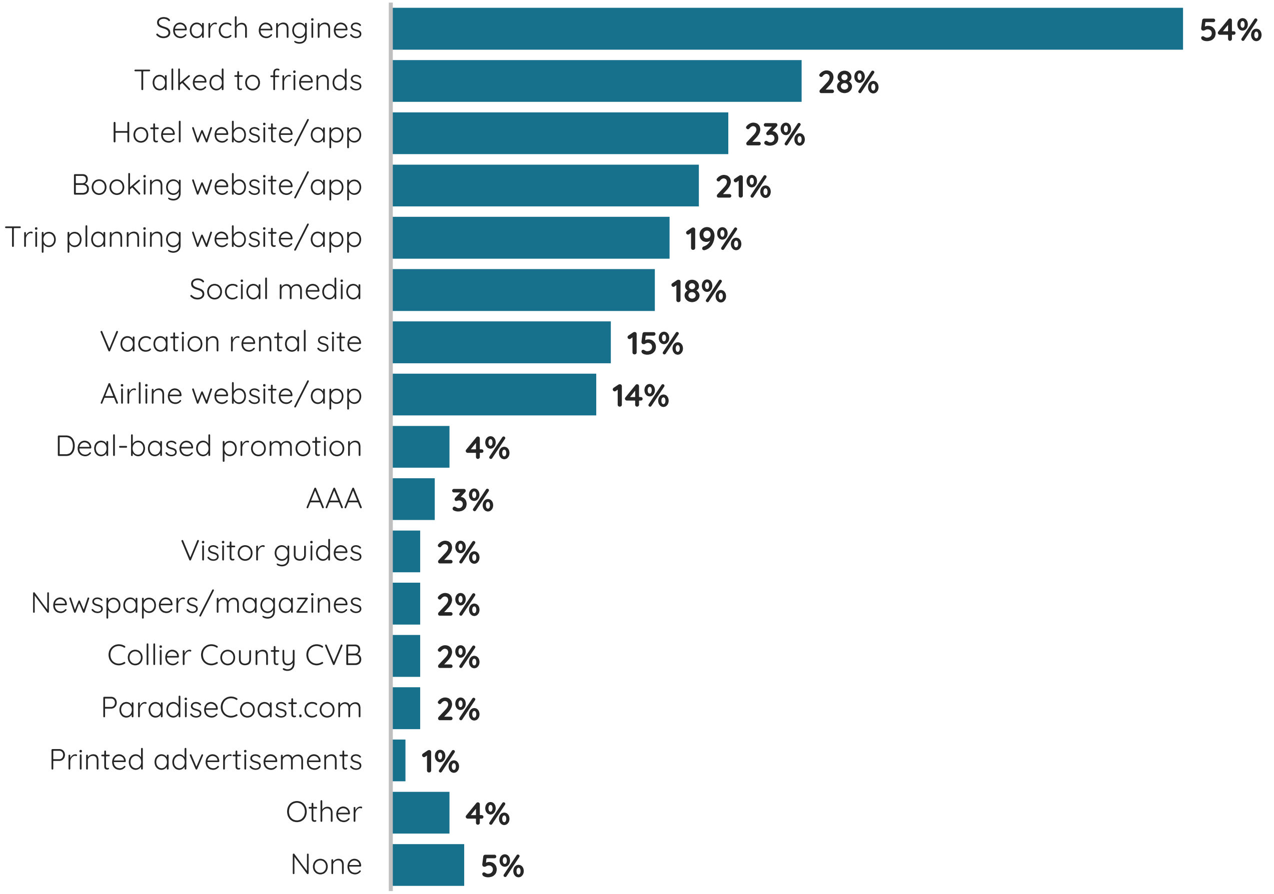
TRIP PLANNING RESOURCES*

Top Trip Planning Resources[1]			
	July-21	July-22	Trend
Search engines	-	54%	-
Talked to friends	-	28%	-
Hotel website/app	-	23%	-
Booking website/app	-	21%	-
Trip planning website/app	-	19%	-
Social media	-	18%	-
Vacation rental site	-	15%	-
Airline website/app	-	14%	-
Deal-based promotion	-	4%	-
AAA	-	3%	-
Visitor guides	-	2%	-
Newspapers/magazines	-	2%	-
Collier County CVB	-	2%	-
ParadiseCoast.com	-	2%	-
Printed advertisements	-	1%	-
Other	-	4%	-
None	-	5%	-

[1] Multiple responses permitted.

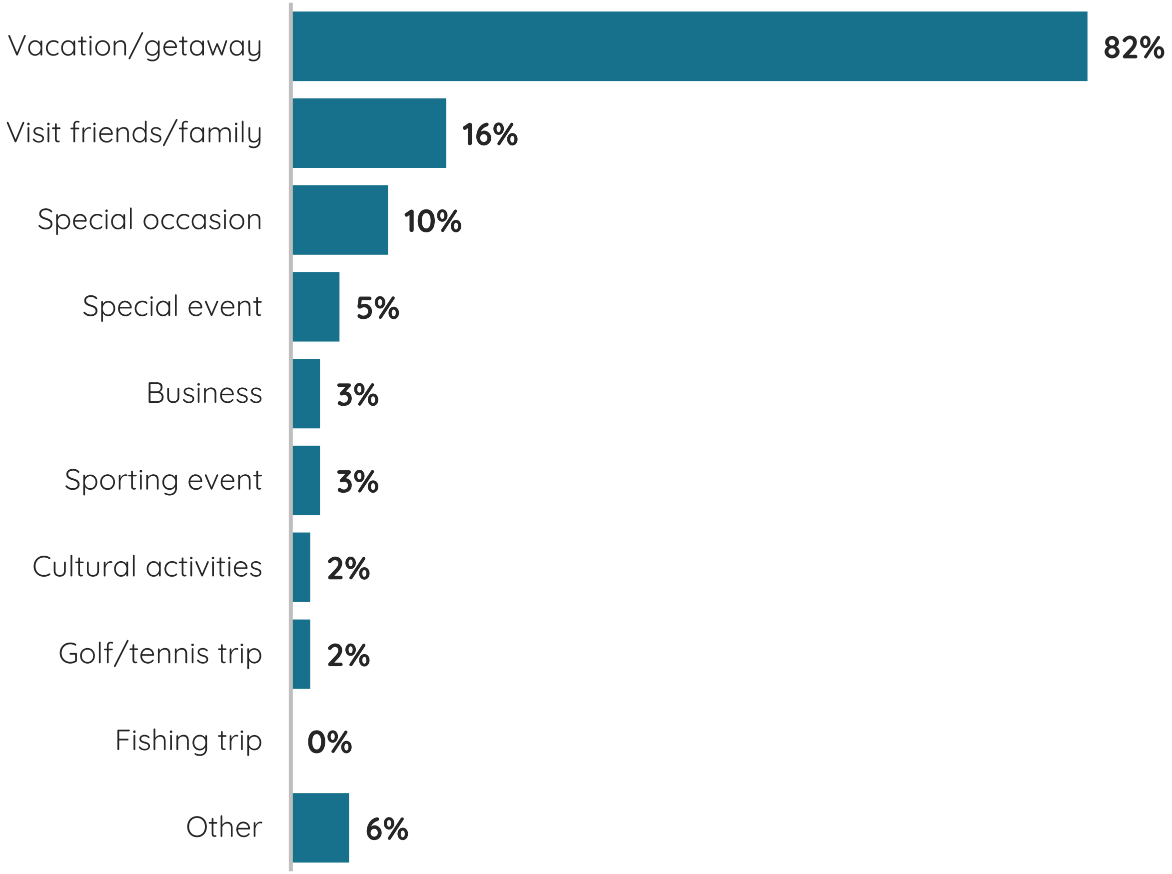


* Visitors staying in paid accommodations.

REASONS FOR VISITING*

Top Reasons for Visiting[1]	July-21	July-22	Trend
Vacation/getaway	86%	82%	↓
Visit friends/family	14%	16%	↑
Special occasion	-	10%	-
Special event	6%	5%	↓
Business	0%	3%	↑
Sporting event	-	3%	-
Cultural activities	-	2%	-
Golf/tennis trip	-	2%	-
Fishing trip	-	0%	-
Other	19%	6%	↓

[1] Multiple responses permitted.



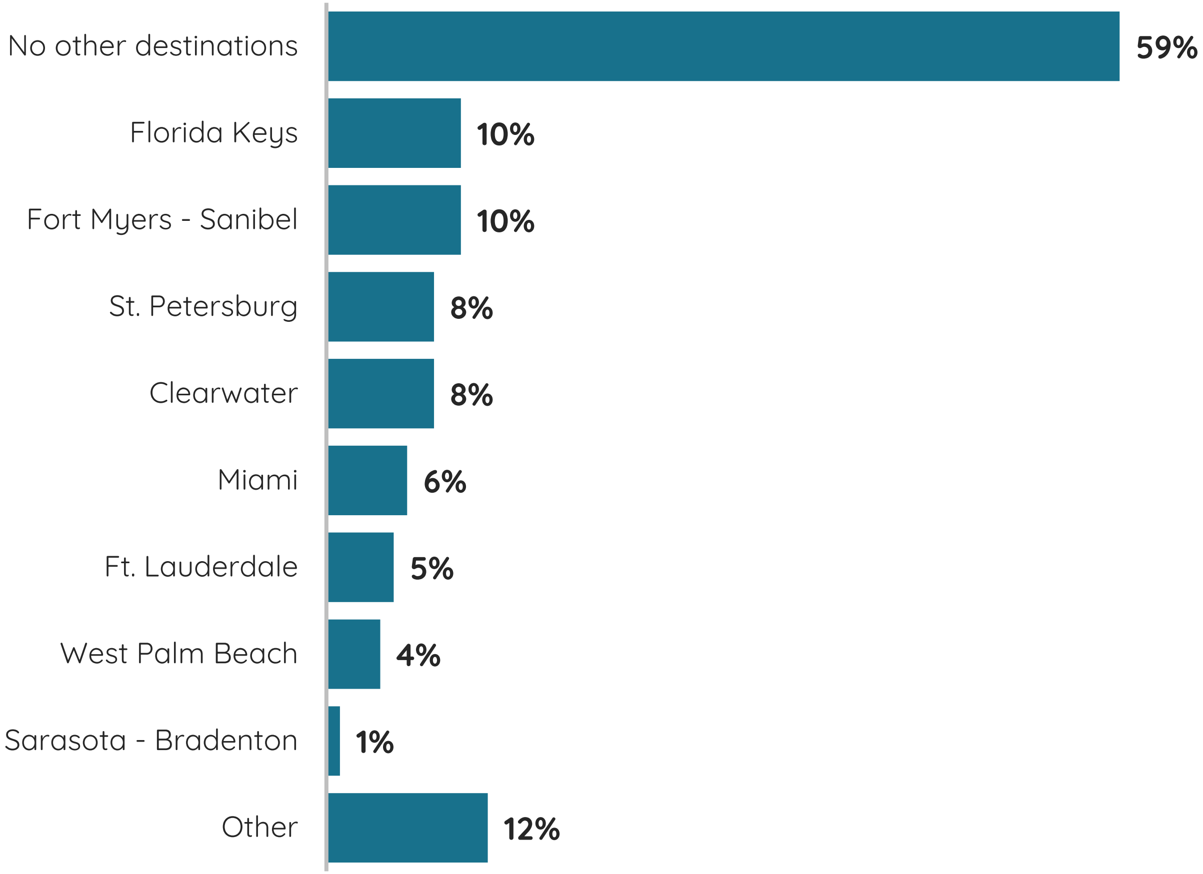
* Visitors staying in paid accommodations.

OTHER DESTINATIONS CONSIDERED*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

Other Destinations Considered[1]			
	July-21	July-22	Trend
No other destinations	-	59%	-
Florida Keys	-	10%	-
Fort Myers – Sanibel	-	10%	-
St. Petersburg	-	8%	-
Clearwater	-	8%	-
Miami	-	6%	-
Ft. Lauderdale	-	5%	-
West Palm Beach	-	4%	-
Sarasota – Bradenton	-	1%	-
Other	-	12%	-

[1] Multiple responses permitted.



* Visitors staying in paid accommodations.

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REASONS FOR CHOOSING AREA*

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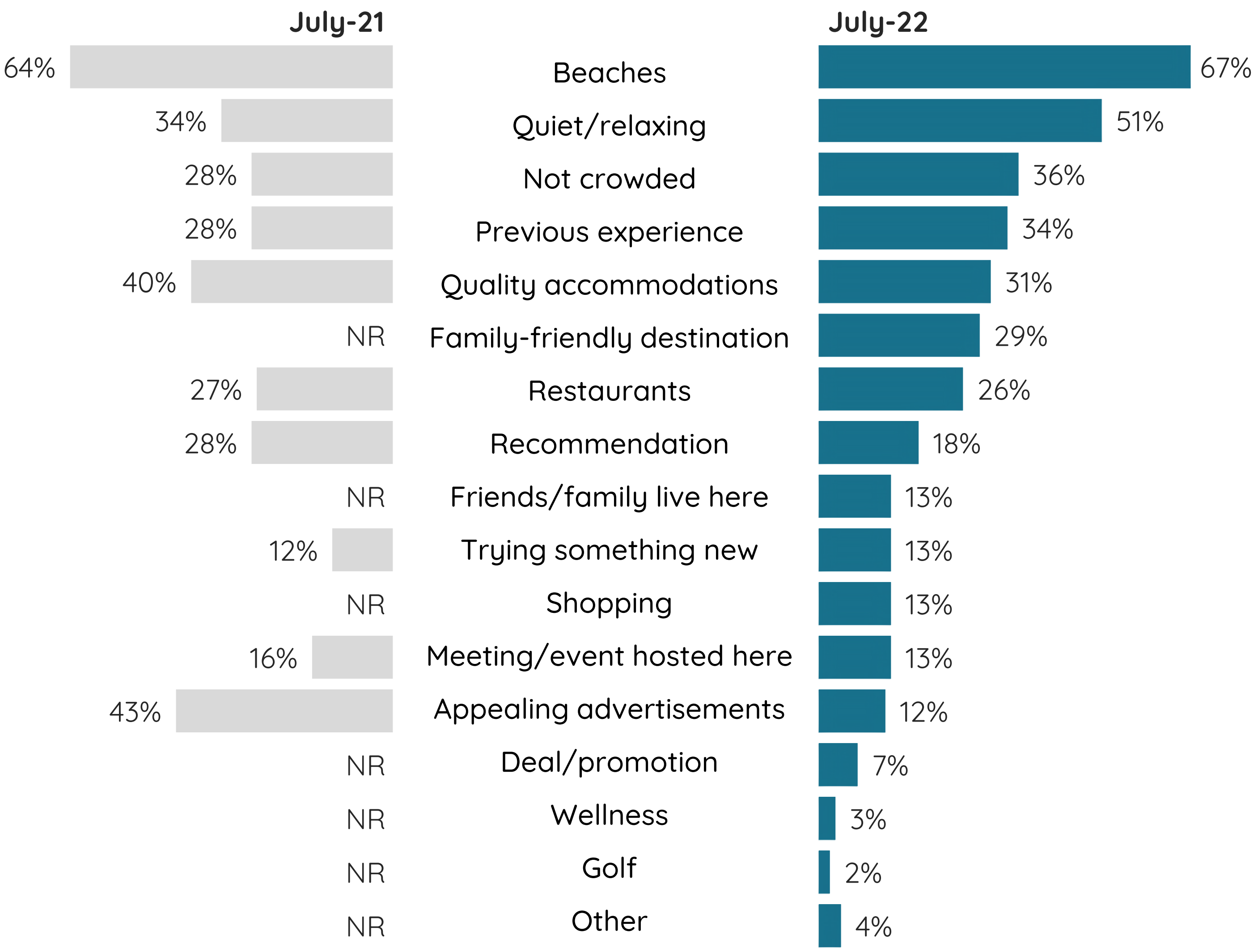
EVERGLADES
FLORIDA'S PARADISE COAST

Reasons for Choosing Area[1]	July-21	July-22	Trend
Beaches	64%	67%	↑
Quiet/relaxing	34%	51%	↑
Not crowded	28%	36%	↑
Previous experience	28%	34%	↑
Quality accommodations	40%	31%	↓
Family-friendly destination	-	29%	-
Restaurants	27%	26%	↓
Recommendation	28%	18%	↓
Friends/family live here	-	13%	-
Trying something new	12%	13%	↑
Shopping	-	13%	-
Meeting/event hosted here	16%	13%	↓
Appealing advertisements	43%	12%	↓
Deal/promotion	-	7%	-
Wellness	-	3%	-
Golf	-	2%	-
Other	-	4%	-

[1] Multiple responses permitted.

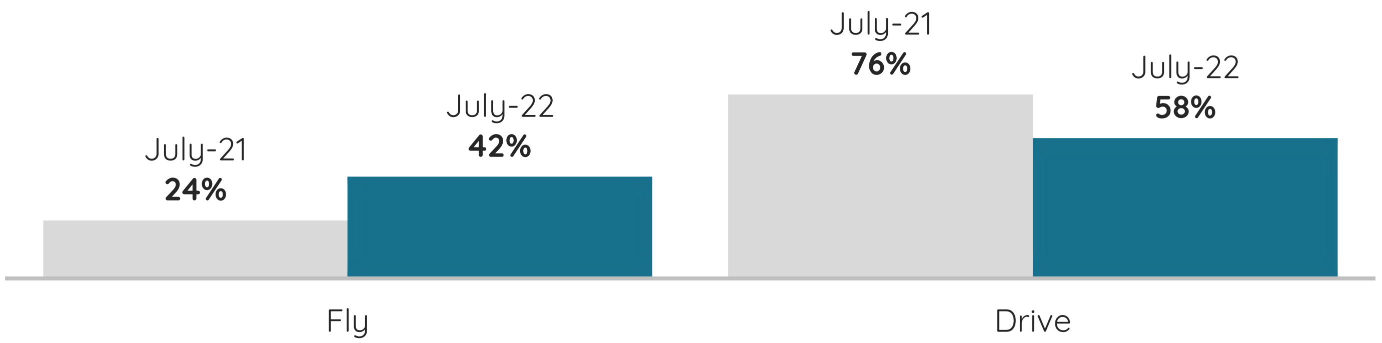


* Visitors staying in paid accommodations.

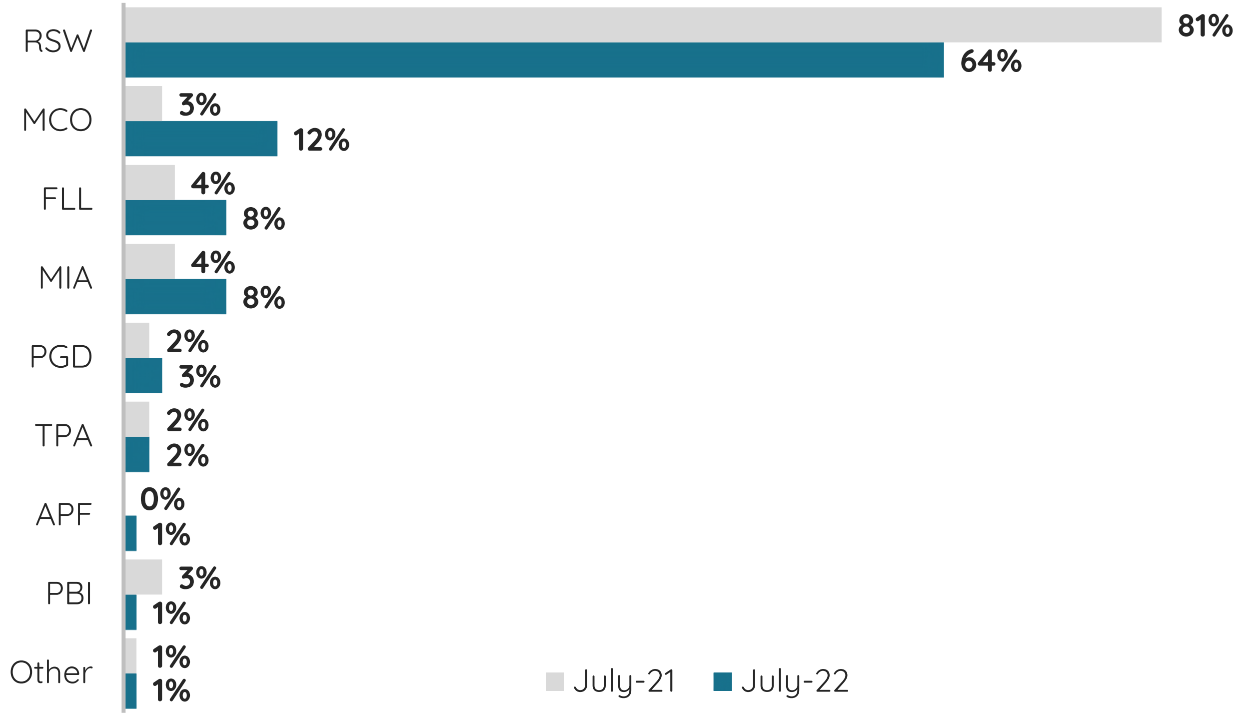
TRANSPORTATION METHODS*

NAPLES · MARCO ISLAND
EVERGLADES
FLORIDA'S PARADISE COAST

Mode of Transportation			
	July-21	July-22	Trend
Fly	24%	42%	↑
Drive	76%	58%	↓



Airport Deplaned (Base: Fly)			
	July-21	July-22	Trend
SWFL Intl Airport (RSW)	81%	64%	↓
Orlando Intl Airport (MCO)	3%	12%	↑
Ft. Lauderdale Intl Airport (FLL)	4%	8%	↑
Miami Intl Airport (MIA)	4%	8%	↑
Punta Gorda Airport (PGD)	2%	3%	↑
Tampa Intl Airport (TPA)	2%	2%	↔
Naples Airport (APF)	3%	1%	↓
Palm Beach Intl Airport (PBI)	0%	1%	↑
Other	1%	1%	↔



* Visitors staying in paid accommodations.

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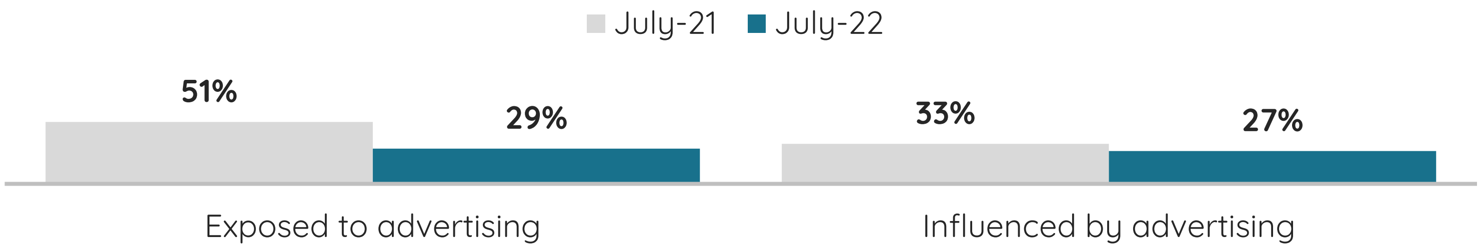
RESEARCH

EXPOSURE TO ADVERTISING*

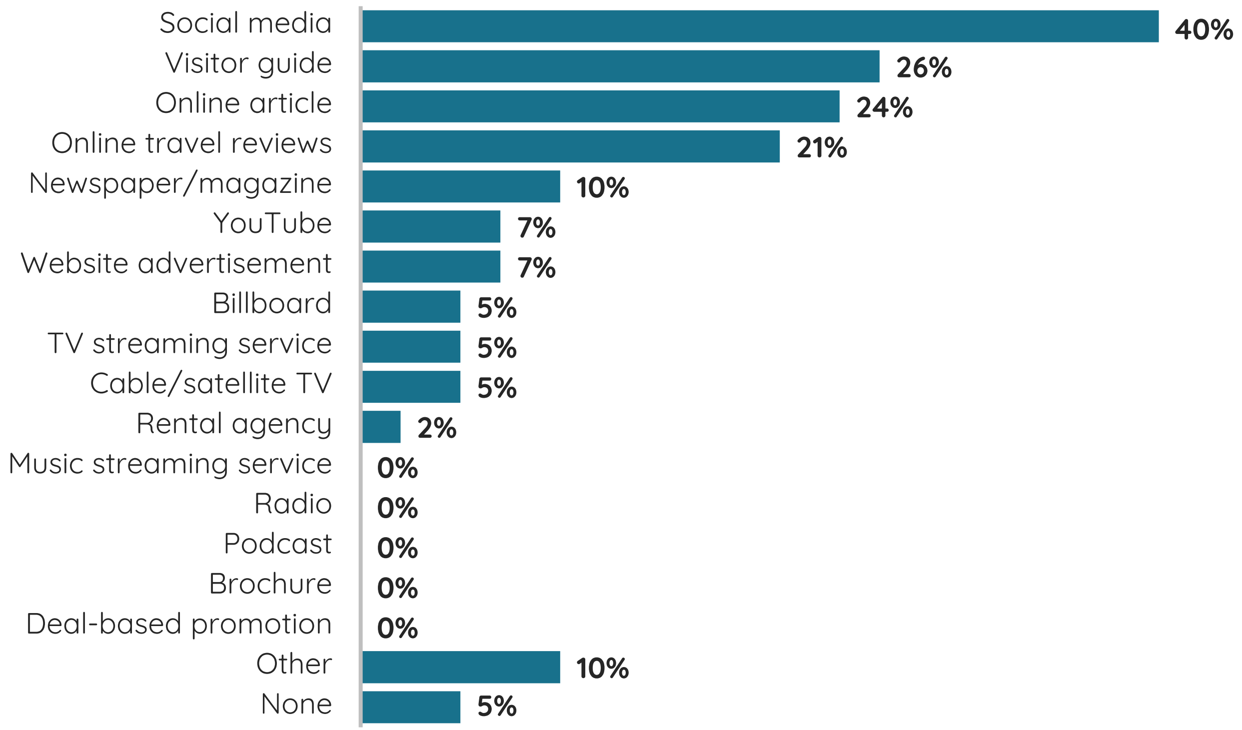
NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

Advertising Exposure & Influence			
	July-21	July-22	Trend
Exposed to advertising	51%	29%	↓
Influenced by advertising	33%	27%	↓



Top Advertising Sources Noticed[1]			
	July-21	July-22	Trend
Social media	-	40%	-
Visitor guide	-	26%	-
Online article	-	24%	-
Online travel reviews	-	21%	-
Newspaper/magazine	-	10%	-
YouTube	-	7%	-
Website advertisement	-	7%	-
Billboard	-	5%	-
TV streaming service	-	5%	-
Cable/satellite TV	-	5%	-
Rental agency	-	2%	-
Music streaming service	-	0%	-
Radio	-	0%	-
Podcast	-	0%	-
Brochure	-	0%	-
Deal-based promotion	-	0%	-
Other	-	10%	-
None	-	5%	-

Base: 29% who saw/read/heard ads



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

* Visitors staying in paid accommodations.

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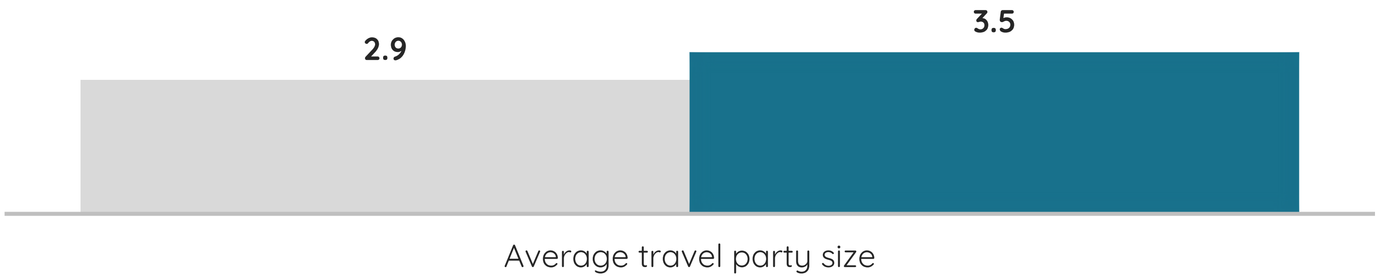
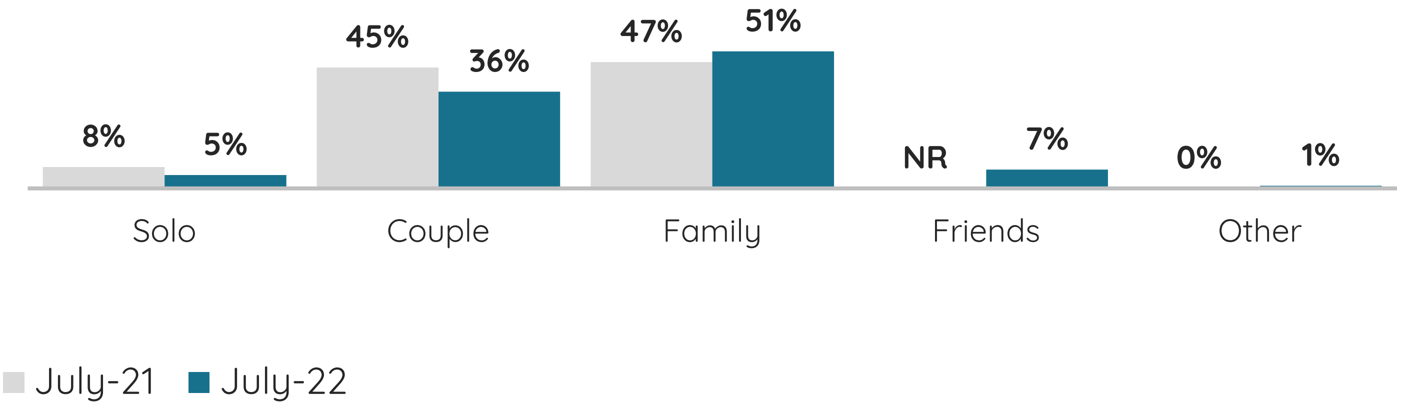
TRAVEL PARTIES*

Average Visitors per Travel Party			
	July-21	July-22	Trend
Average travel party size	2.9	3.5	↑



Travel Party Composition			
	July-21	July-22	Trend
Solo	8%	5%	↓
Couple	45%	36%	↓
Family	47%	51%	↑
Friends	-	7%	-
Other	0%	1%	↑

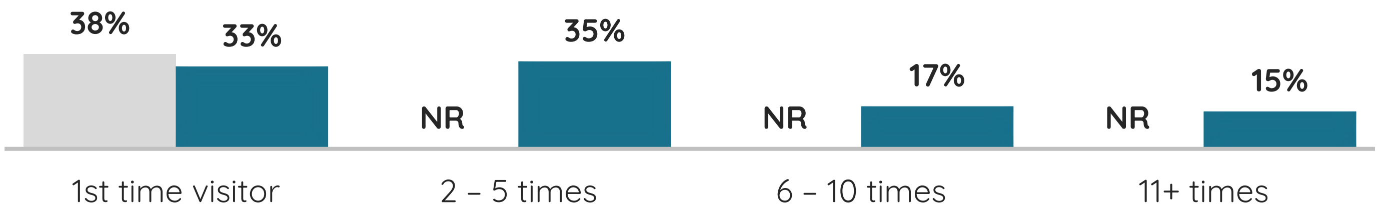


* Visitors staying in paid accommodations.

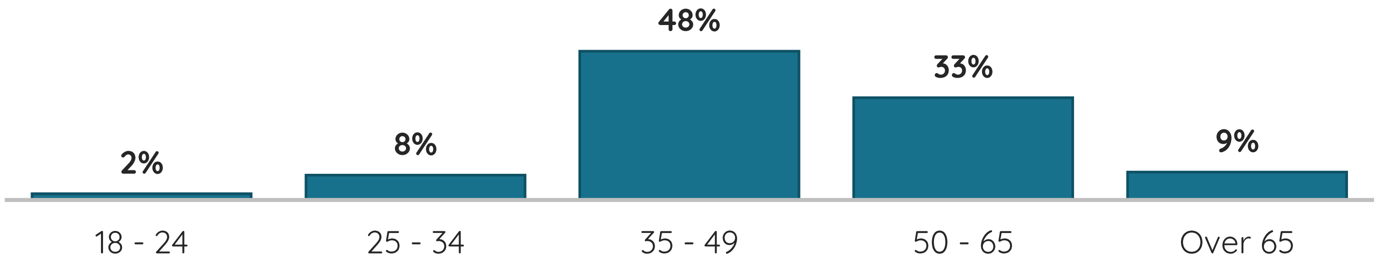
VISITING PARADISE COAST*

NAPLES • MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

Previous Visits	July-21	July-22	Trend
1st time visitor	38%	33%	↓
2 – 5 times	-	35%	-
6 – 10 times	-	17%	-
11+ times	-	15%	-



Typical Visitor Ages	July-21	July-22	Trend
Median Age	-	47	-
Average Age	42.2	49.3	↑



* Visitors staying in paid accommodations.

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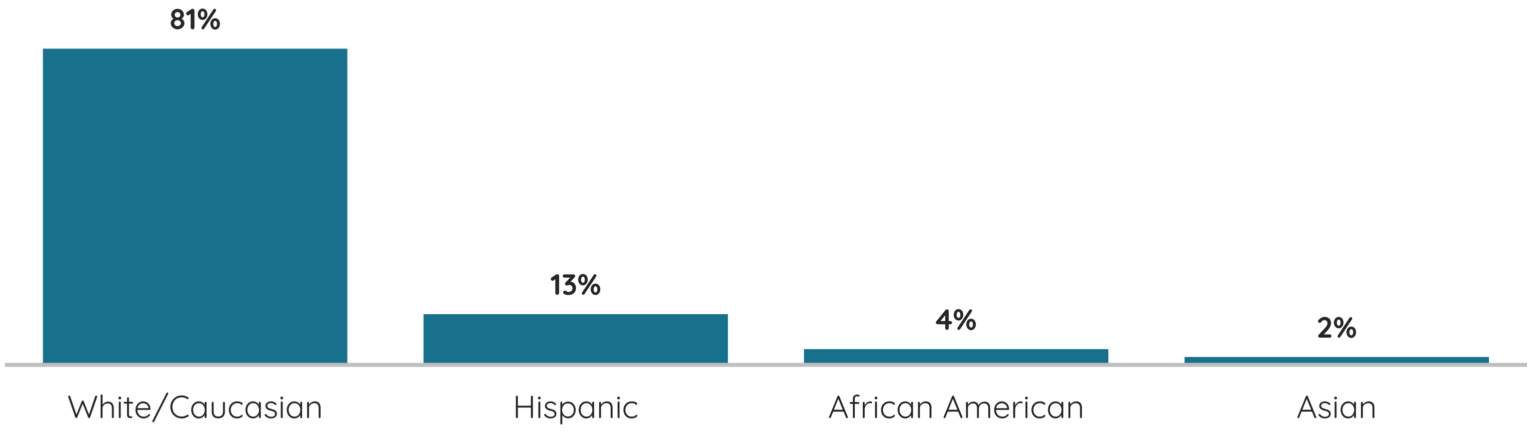
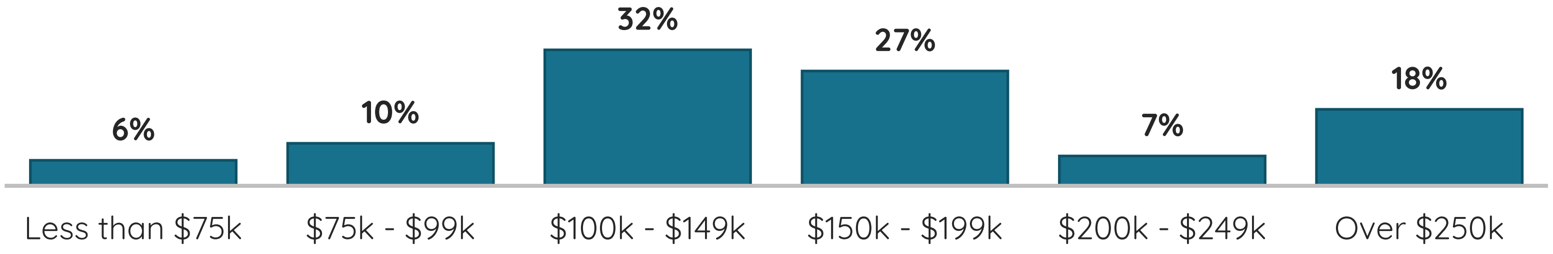
VISITOR DEMOGRAPHICS*

Race/Ethnicity			
	July-21	July-22	Trend
White/Caucasian	-	81%	-
Hispanic	-	13%	-
African American	-	4%	-
Asian	-	2%	-
Native/Indigenous	-	0%	-
Another race/ethnicity	-	0%	-



Typical Visitor Household Income			
	July-21	July-22	Trend
Median HHI	$133,200	$153,700	↑

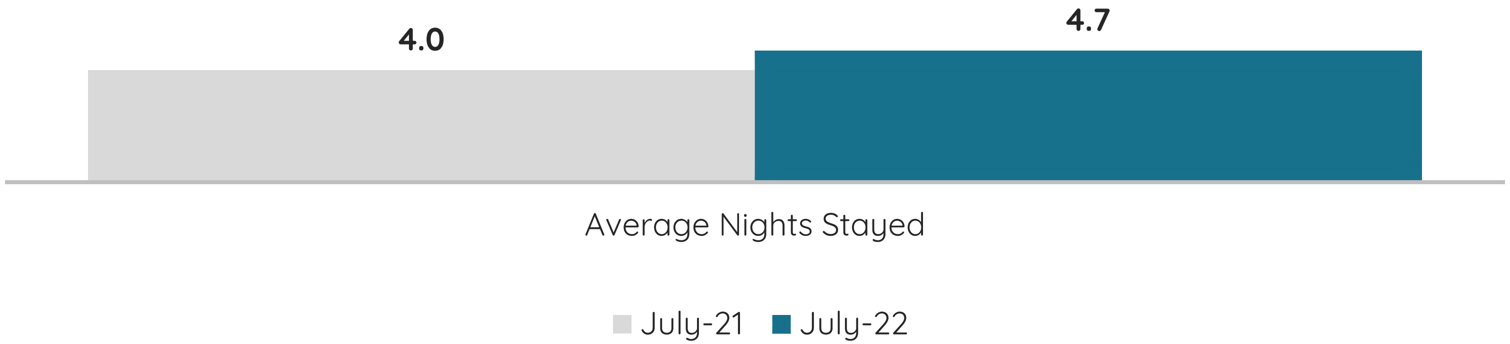


* Visitors staying in paid accommodations.

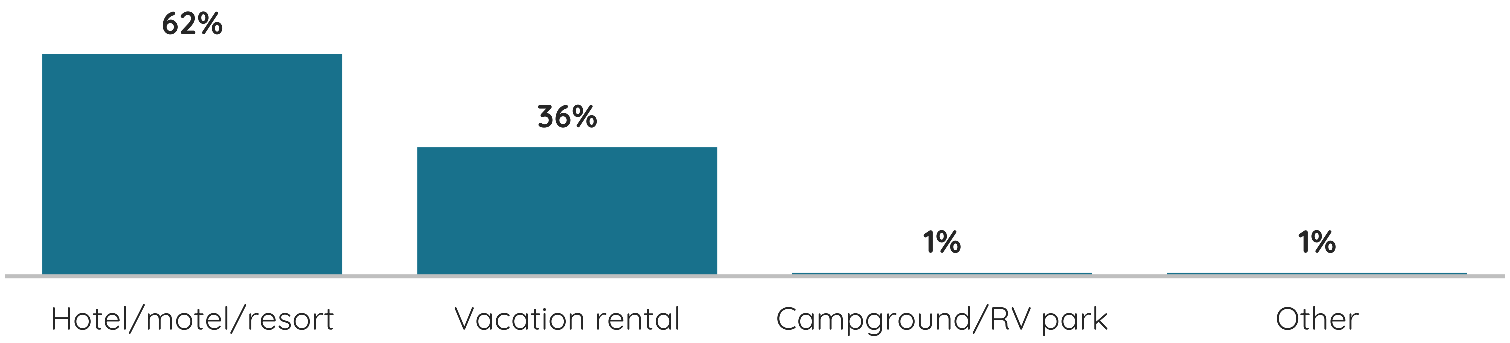
OVERNIGHT VISITS*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

Nights in Destination			
	July-21	July-22	Trend
Nights Stayed (mean)	4.0	4.7	↑



Accommodations			
	July-21	July-22	Trend
Hotel/motel/resort	-	62%	-
Vacation rental	-	36%	-
Campground/RV park	-	1%	-
Other	-	1%	-



* Visitors staying in paid accommodations.

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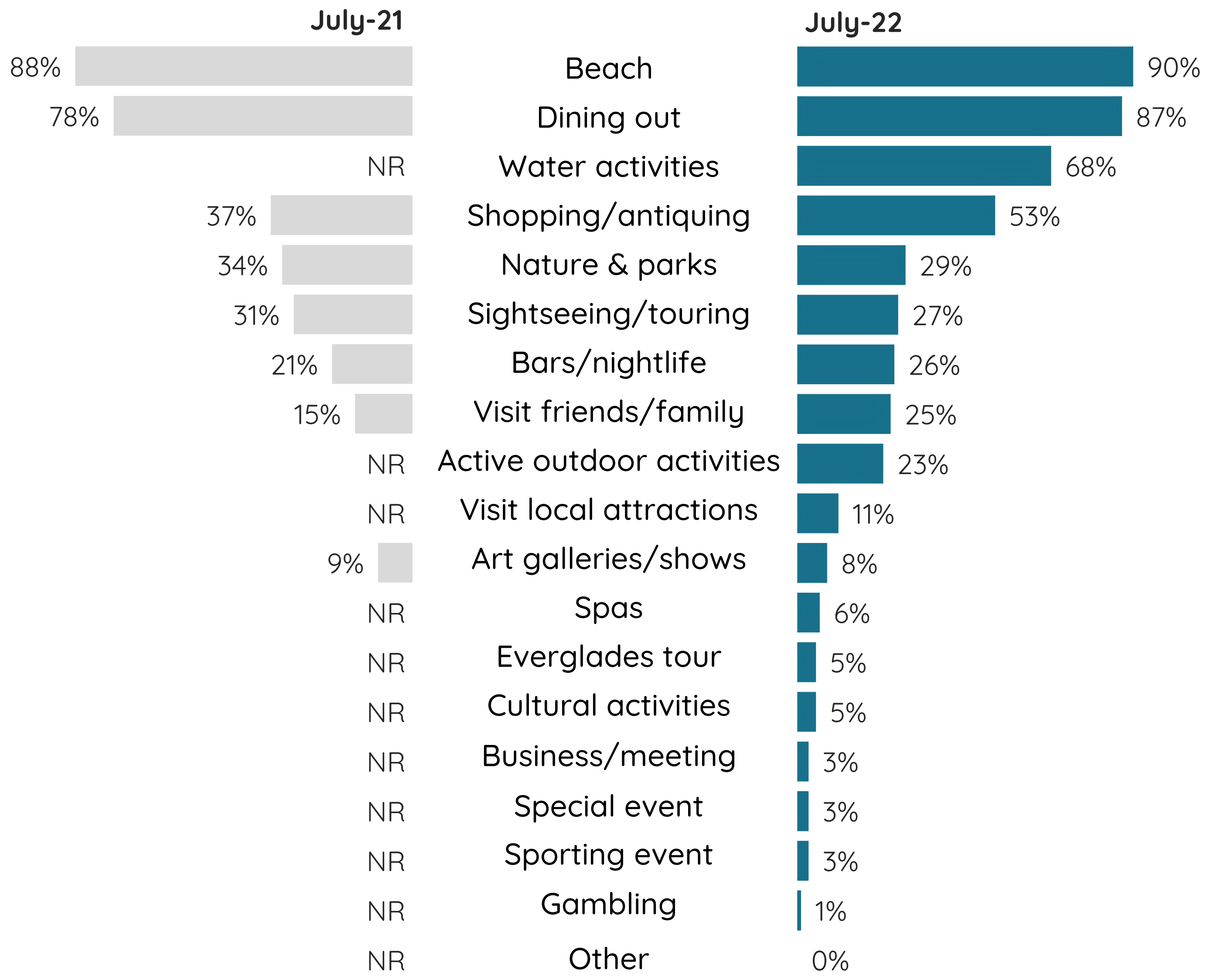
TRIP ACTIVITIES*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

Trip Activities[1]			
	July-21	July-22	Trend
Beach	88%	90%	↑
Dining out	78%	87%	↑
Water activities	-	68%	-
Shopping/antiquing	37%	53%	↑
Nature & parks	34%	29%	↓
Sightseeing/touring	31%	27%	↓
Bars/nightlife	21%	26%	↑
Visit friends/family	15%	25%	↑
Active outdoor activities	-	23%	-
Visit local attractions	-	11%	-
Art galleries/shows	9%	8%	↓
Spas	-	6%	-
Everglades tour	-	5%	-
Cultural activities	-	5%	-
Business/meeting	-	3%	-
Special event	-	3%	-
Sporting event	-	3%	-
Gambling	-	1%	-
Other	-	0%	-

[1] Multiple responses permitted.



* Visitors staying in paid accommodations.

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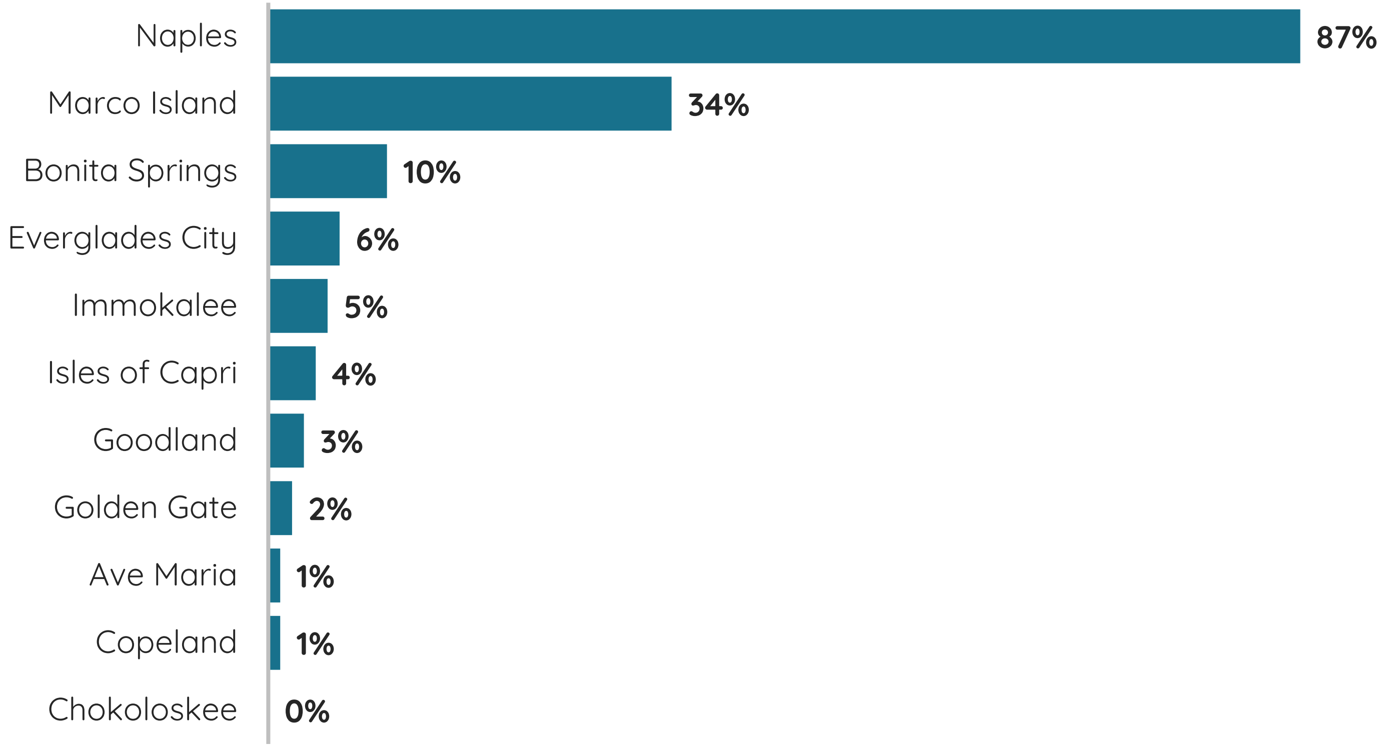
AREAS VISITED*

NAPLES · MARCO ISLAND
EVERGLADES
FLORIDA'S PARADISE COAST

Areas Visited in Destination[1]			
	July-21	July-22	Trend
Naples	-	87%	-
Marco Island	-	34%	-
Bonita Springs	-	10%	-
Everglades City	-	6%	-
Immokalee	-	5%	-
Isles of Capri	-	4%	-
Goodland	-	3%	-
Golden Gate	-	2%	-
Copeland	-	1%	-
Ave Maria	-	1%	-
Chokoloskee	-	0%	-

[1] Multiple responses permitted.



* Visitors staying in paid accommodations.

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VISITOR SPENDING*

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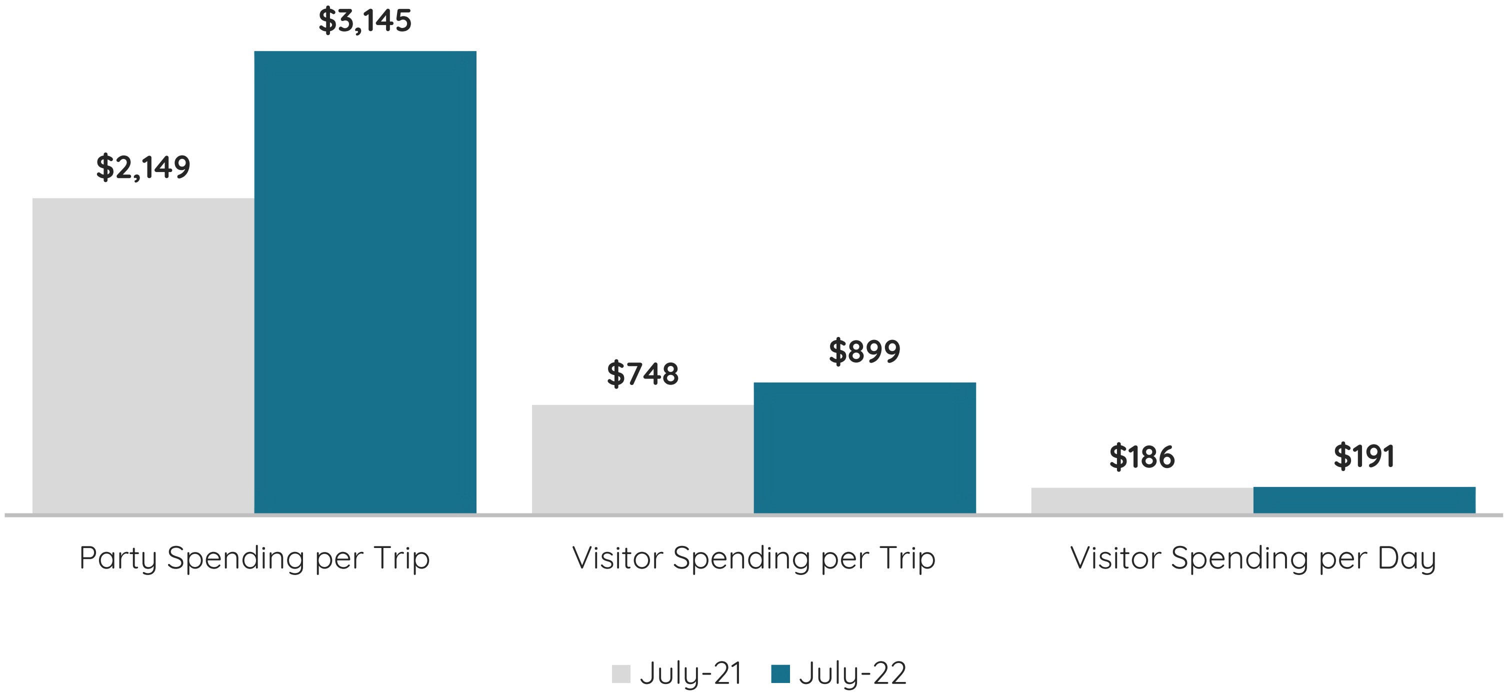
FLORIDA'S PARADISE COAST

Visitor Spending			
	July-21	July-22	Trend
Party Spending per Trip	$2,149	$3,145	↑
Visitor Spending per Trip	$748	$899	↑
Visitor Spending per Day	$186	$191	↑



* Visitors staying in paid accommodations.

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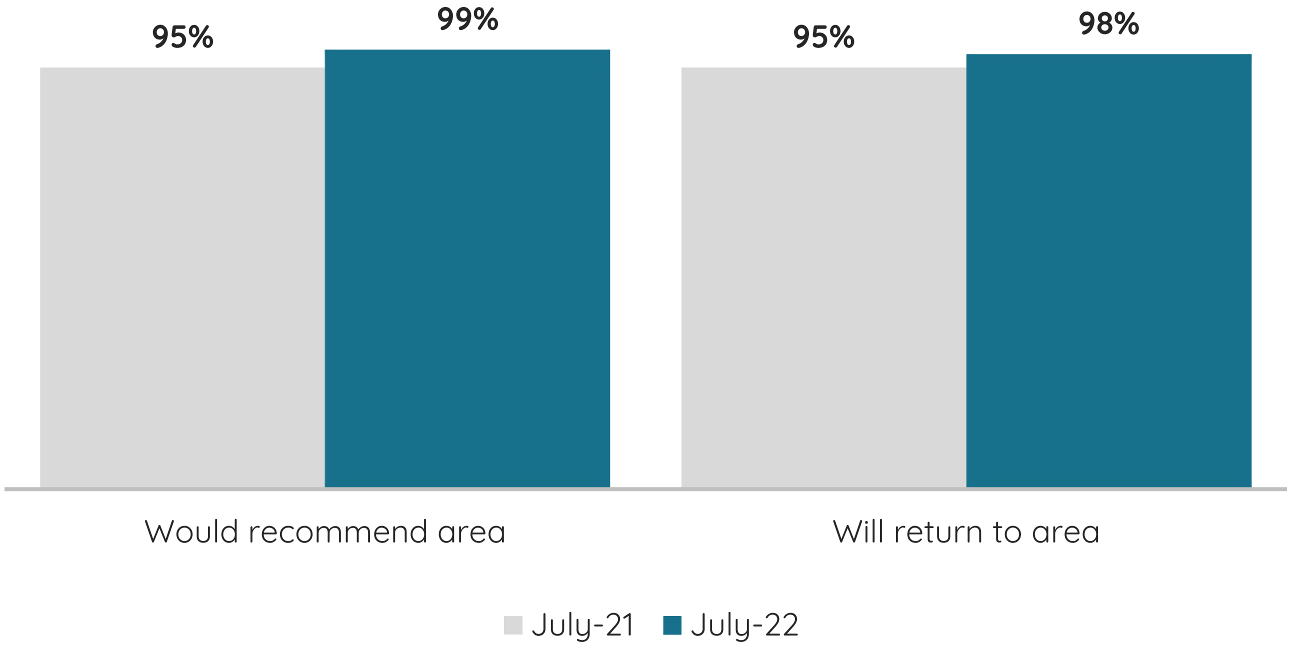
TRIP EVALUATIONS*

Satisfaction with Destination			
	July-21	July-22	Trend
Value for travel dollar[1]	-	9.3	-
Would recommend area	95%	99%	↑
Will return to area	95%	98%	↑

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

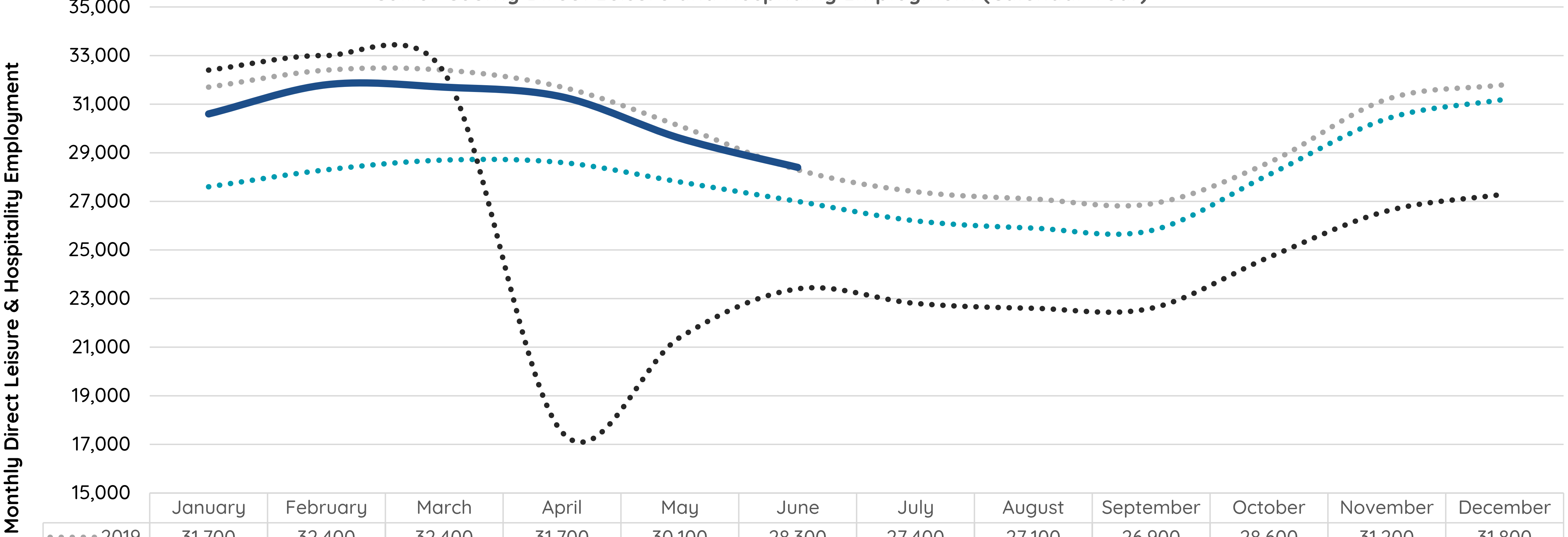


* Visitors staying in paid accommodations.

INDUSTRY DATA

LEISURE & HOSPITALTY EMPLOYMENT

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



	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	28,400 (P)						

[1] SOURCE: Current Employment Statistic Program (CES), Collier County Leisure and Hospitality Sector, not seasonally adjusted.
(P) Preliminary.

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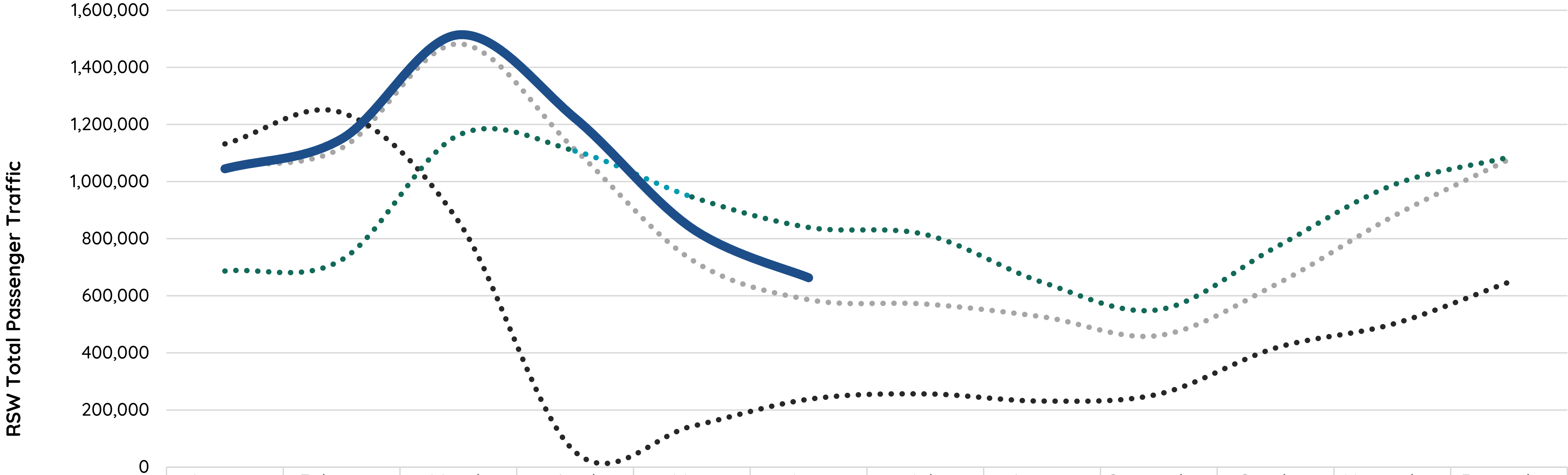
RSW PASSENGER TRAFFIC

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

Southwest Florida International Airport (RSW) Passenger Traffic



	January	February	March	April	May	June	July	August	September	October	November	December
2019	1,050,093	1,117,409	1,482,239	1,111,558	725,754	586,319	570,977	526,519	460,869	638,922	876,703	1,077,818
2020	1,132,103	1,241,590	861,221	53,379	143,004	237,706	256,418	231,283	255,926	417,305	500,468	648,011
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						

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

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LICENSED TRANSIENT RENTAL UNITS

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

July 2022 Licensed Transient Rental Units[1]				
	Hotel	Motel	Vacation Rental	Total
Naples	4,452	1,553	3,162	9,167
Marco Island	1,275	115	1,702	3,092
Immokalee	0	55	104	159
Golden Gate	0	150	0	150
Everglades City	38	36	14	88
Bonita Springs	0	5	61	66
Chokoloskee	0	13	2	15
Goodland	0	5	4	9
Ochopee	0	0	2	2
Ave Maria	0	0	1	1
Total	**5,765**	**1,932**	**5,052**	**12,749**

[1] SOURCE: Florida Department of Business & Professional Regulation.

NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau

July 2022 Monthly Dashboard

Paul Beirnes, Executive Director
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