

# NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau  
March 2022 Monthly Dashboard





While occupancy rates have dipped moderately compared to March 2021, Collier County's average room rates have remained among the highest in Florida; RevPAR in March was 5.4% higher than in February



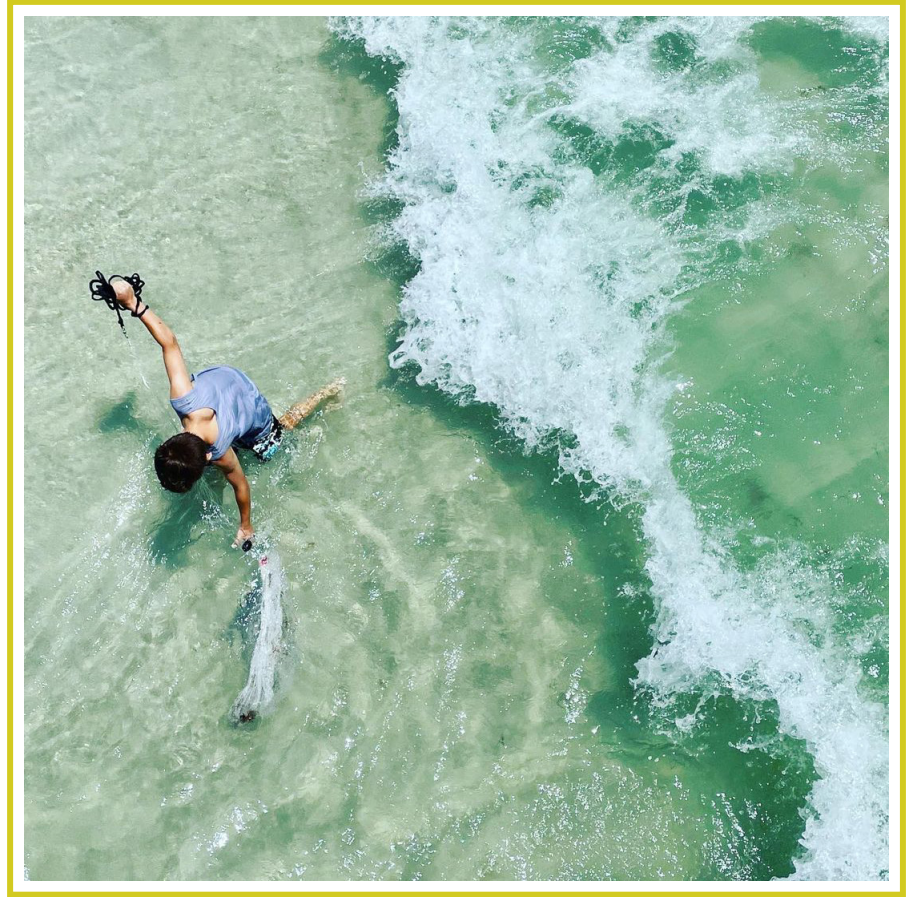
Hotels, resorts, and vacation rentals are beginning to see future bookings decrease since this time last year, though demand remains strong



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



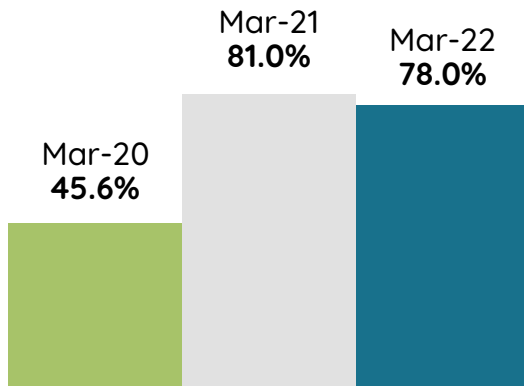
Spending is up 29% over last March due to larger travel parties, longer trip lengths, more inventory available to visitors, and consumers' continued "revenge" vacation spending



# MARCH 2022 LODGING METRICS\*

## OCCUPANCY RATE

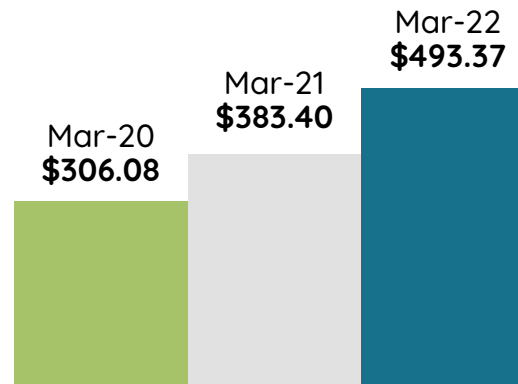
**78.0%**



+ 71.1% from 2020  
- 3.7% from 2021

## AVERAGE DAILY RATE

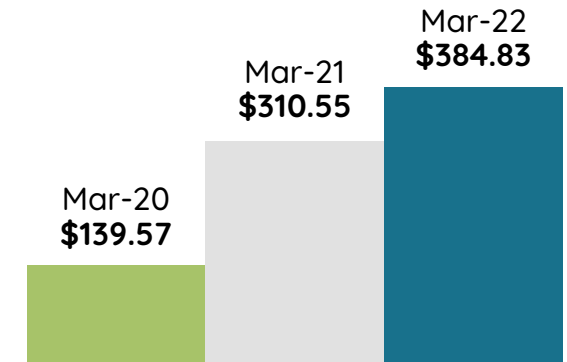
**\$493.37**



+ 61.2% from 2020  
+ 28.7% from 2021

## REVENUE PER AVAILABLE ROOM

**\$384.83**



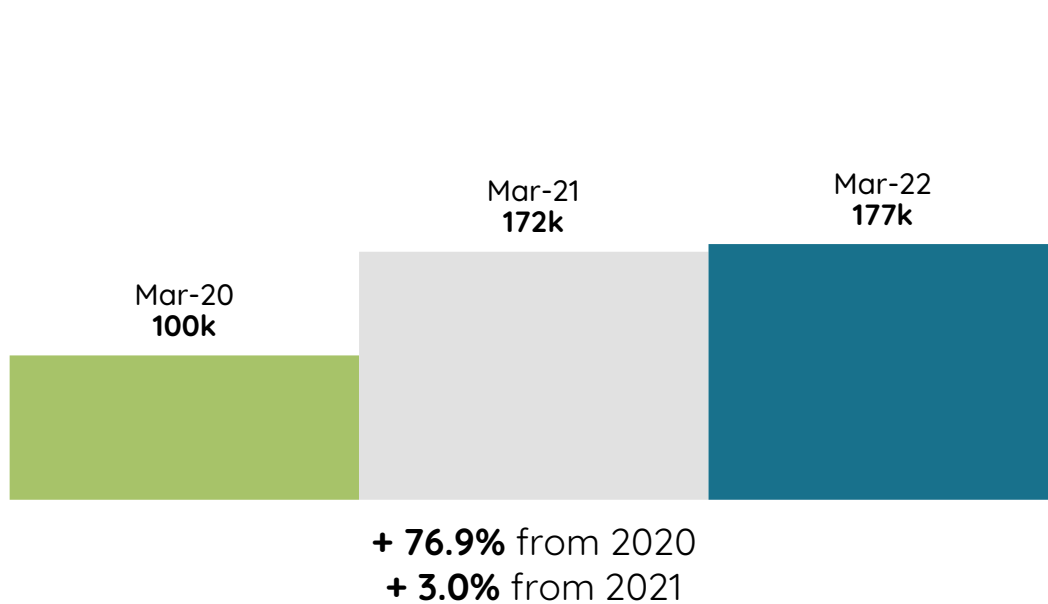
+ 175.7% from 2020  
+ 23.9% from 2021

\* Visitors staying in paid accommodations.

# MARCH 2022 VISITATION & ROOM NIGHTS\*

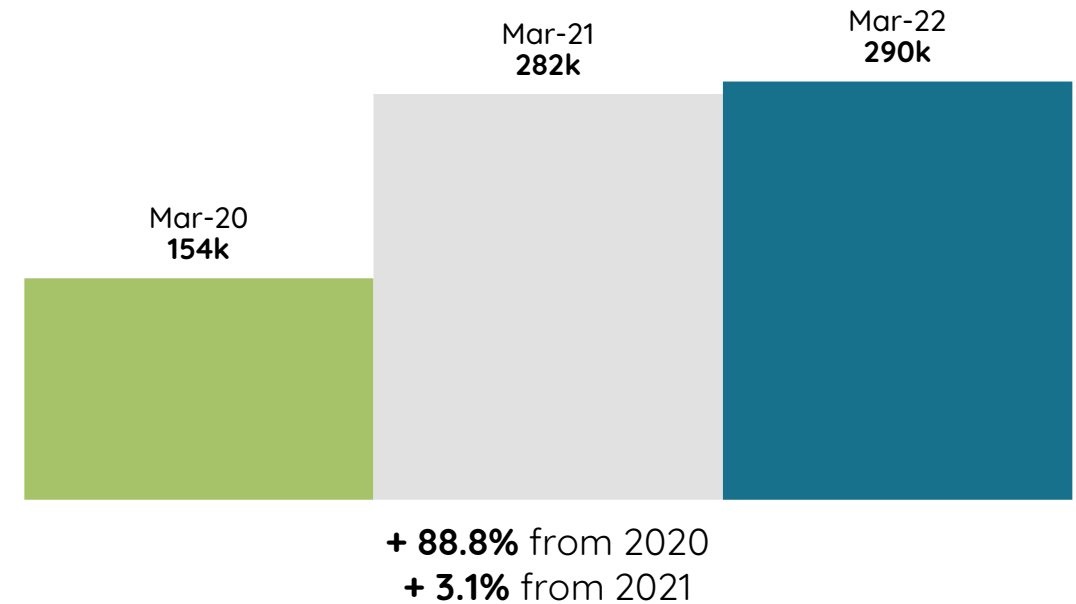
## VISITORS

**177,400**



## ROOM NIGHTS

**290,300**

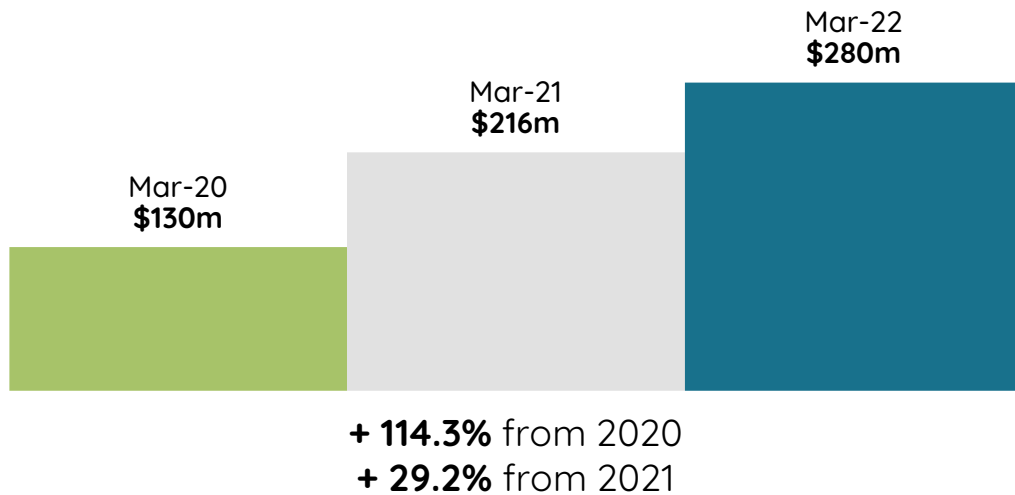


\* Visitors staying in paid accommodations.

# MARCH 2022 SPENDING & ECONOMIC IMPACT\*

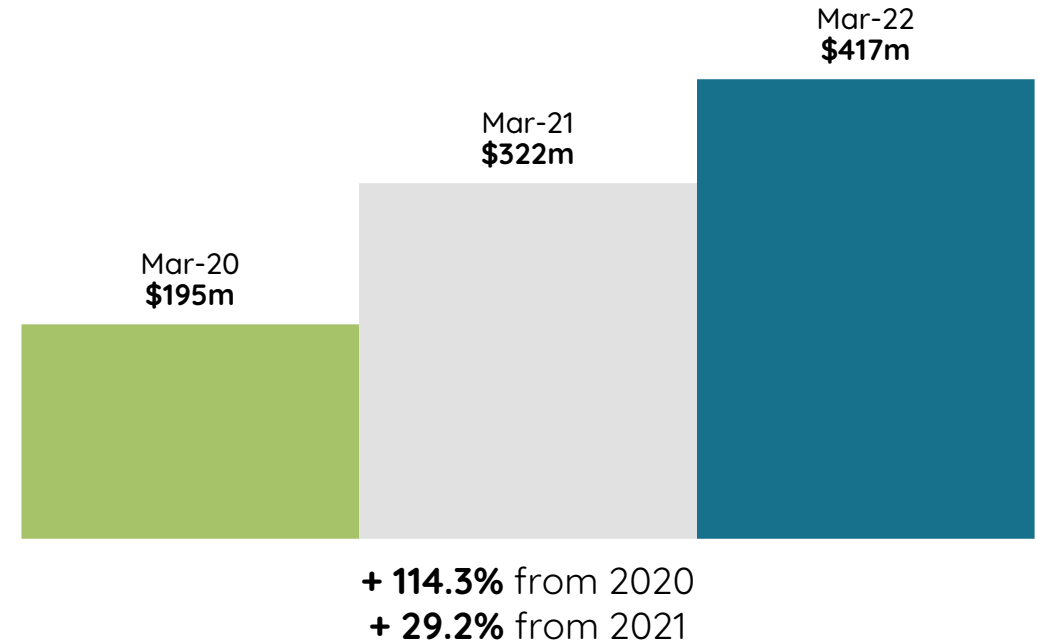
## DIRECT SPENDING

**\$279,529,700**



## ECONOMIC IMPACT

**\$416,778,800**



\* Visitors staying in paid accommodations.

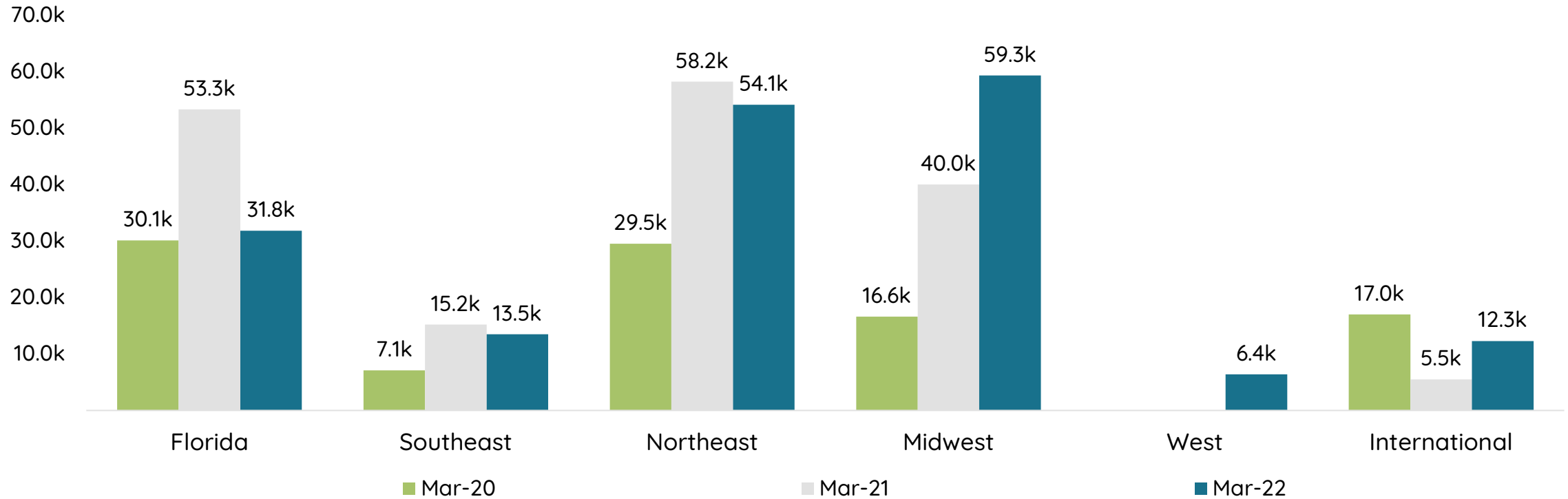
# VISITOR ORIGIN\*

## FLORIDA VISITORS

**31,800**

## OUT-OF-STATE VISITORS

**145,600**



\* Visitors staying in paid accommodations.

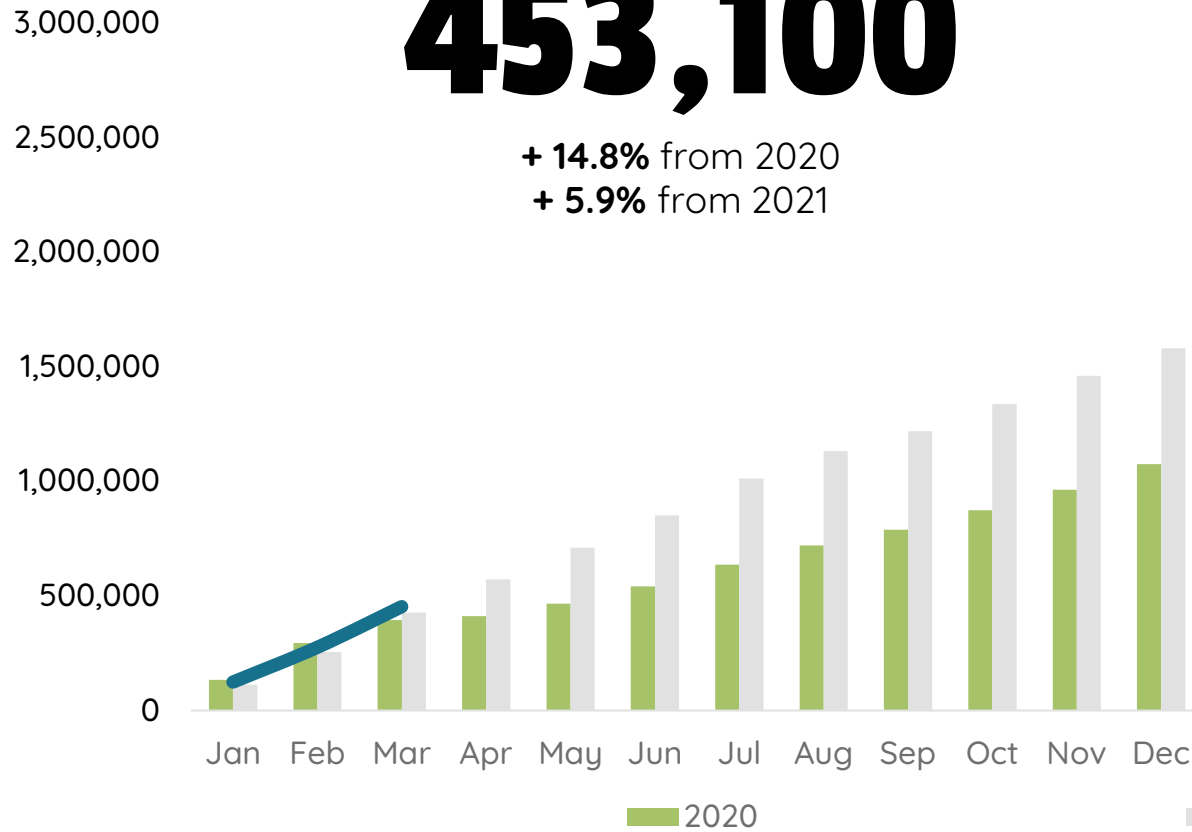


# CUMULATIVE VISITATION & ROOM NIGHTS\*

## CYTD VISITORS

**453,100**

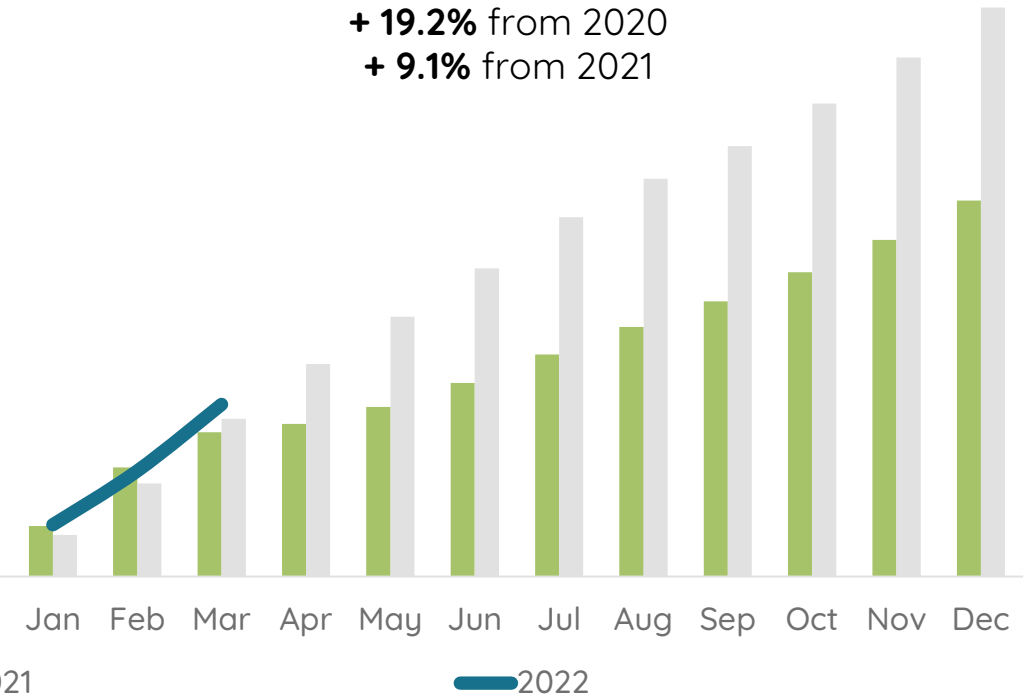
+ 14.8% from 2020  
+ 5.9% from 2021



## CYTD ROOM NIGHTS

**750,600**

+ 19.2% from 2020  
+ 9.1% from 2021



\* Visitors staying in paid accommodations.

# CUMULATIVE SPENDING & ECONOMIC IMPACT\*

## CYTD DIRECT SPENDING

**\$606,474,500**

+ 36.8% from 2020  
+ 24.5% from 2021

\$3,000,000,000

\$2,500,000,000

\$2,000,000,000

\$1,500,000,000

\$1,000,000,000

\$500,000,000

\$0

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

2020

2021

## CYTD ECONOMIC IMPACT

**\$906,253,500**

+ 36.8% from 2020  
+ 24.5% from 2021

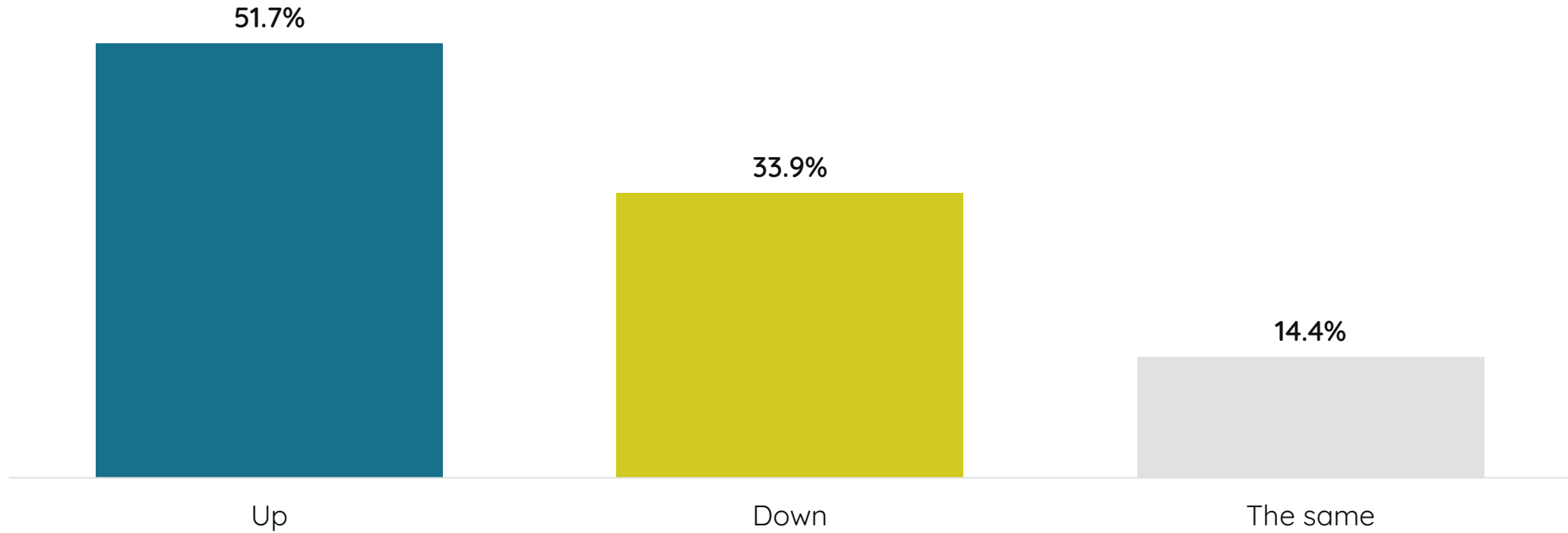
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

2022

\* Visitors staying in paid accommodations.

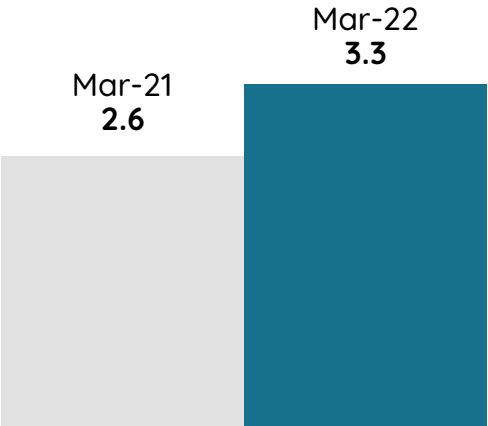


Looking ahead to the next three months, are your property's reservations up, down, or the same compared to this time last year?



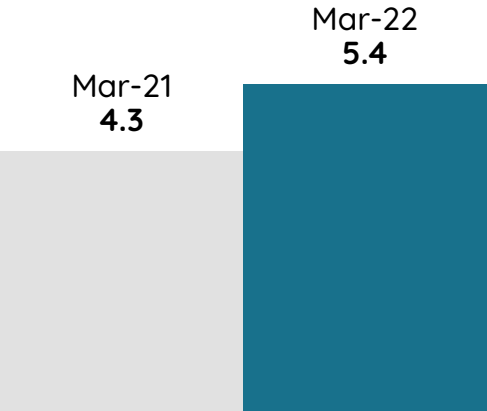
TRAVEL PARTY SIZE

3.3



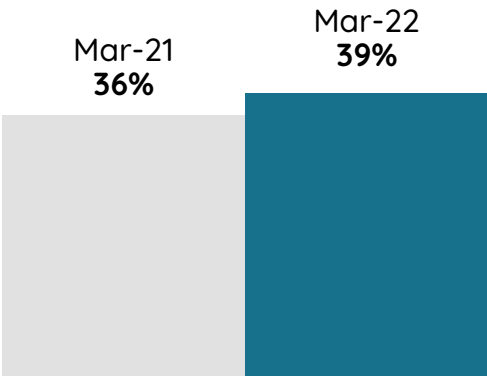
NIGHTS STAYED

5.4



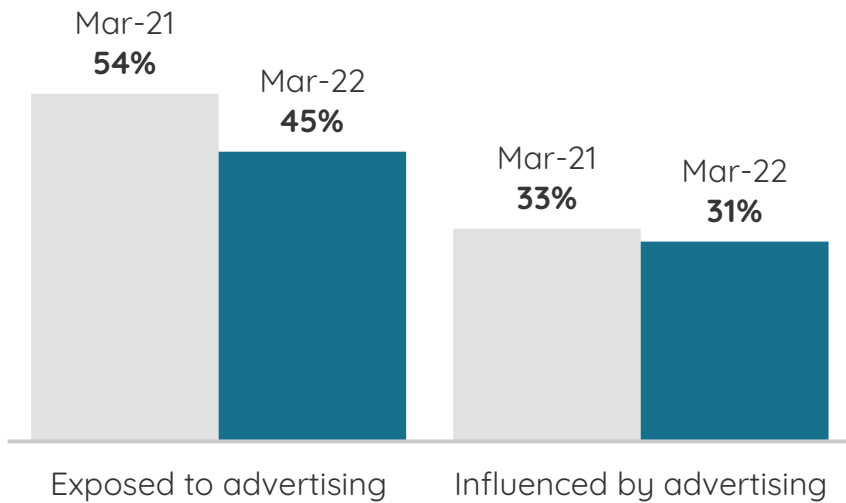
1ST TIME VISITORS

39%

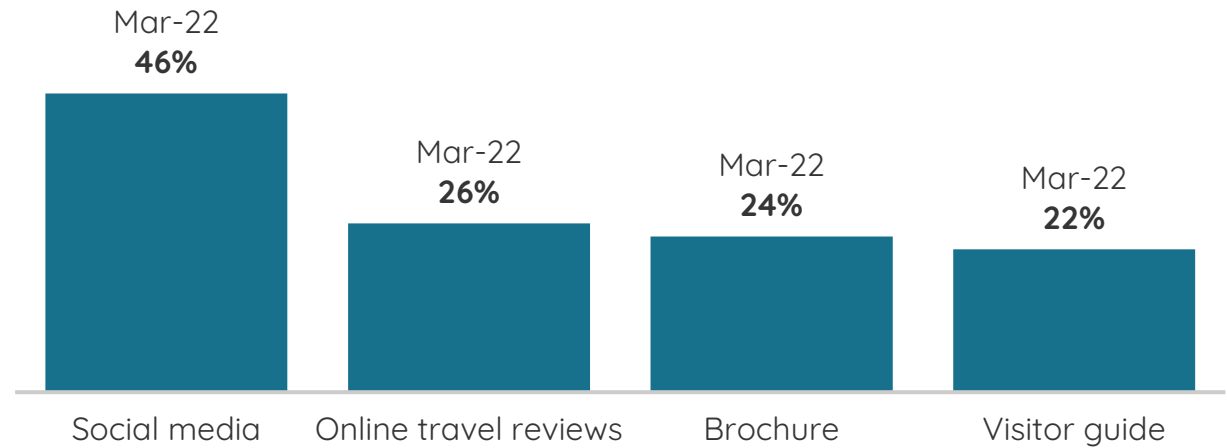


\* Visitors staying in paid accommodations.

## REACH & INFLUENCE



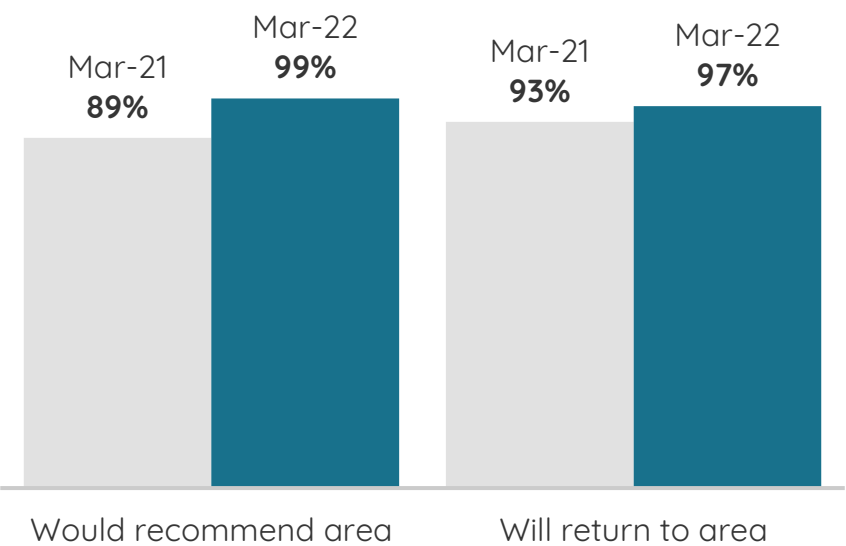
## RECALLED SOURCES\*\*



\* Visitors staying in paid accommodations.

\*\* Base of visitors exposed to advertising. Multiple responses permitted.

## SATISFACTION WITH DESTINATION



## VALUE FOR TRAVEL DOLLAR\*\*



\* Visitors staying in paid accommodations.  
\*\* 10-point scale where 10 is “excellent” and 1 is “poor”.

# MARCH 2022 METRICS

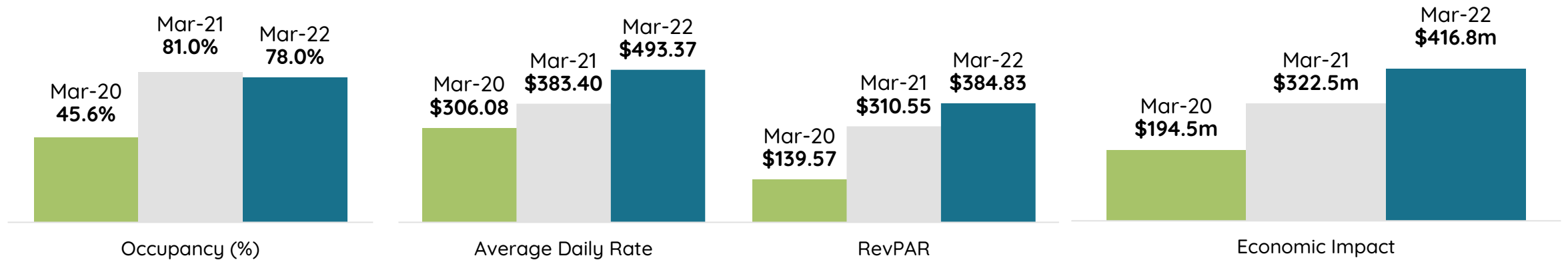


# MARCH 2022 OVERNIGHT VISITATION & LODGING\*

	March 2020	March 2021	March 2022	% Change from 2020	% Change from 2021
Occupancy Rate	45.6%	81.0%	78.0%	+ 71.1%	- 3.7%
Average Daily Rate	\$306.08	\$383.40	\$493.37	+ 61.2%	+ 28.7%
RevPAR	\$139.57	\$310.55	\$384.83	+ 175.7%	+ 23.9%

	March 2020	March 2021	March 2022	% Change from 2020	% Change from 2021
Visitors	100,300	172,200	177,400	+ 76.9%	+ 3.0%
Room Nights	153,800	281,700	290,300	+ 88.8%	+ 3.1%
Direct Spending	\$130,467,200	\$216,283,300	\$279,529,700	+ 114.3%	+ 29.2%
Economic Impact	\$194,526,600	\$322,478,400	\$416,778,800	+ 114.3%	+ 29.2%



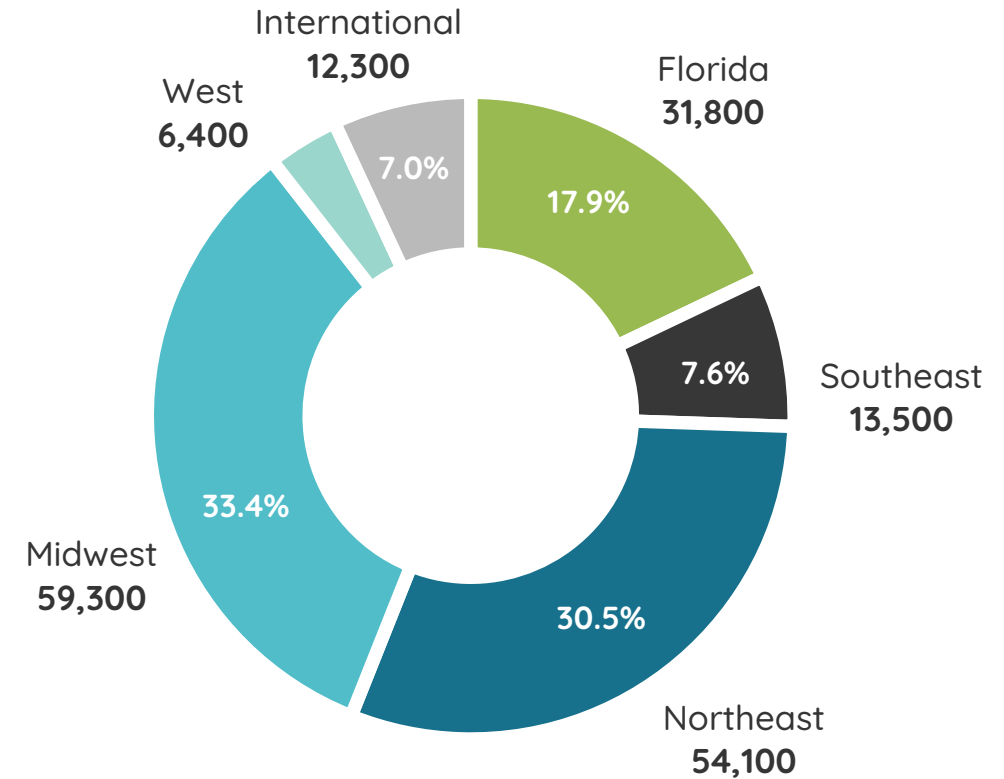
\* Visitors staying in paid accommodations.

# MARCH 2022 OVERNIGHT VISITOR ORIGIN MARKETS\*

Region	March 2021		March 2022		Percent Change (Δ%)	
	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	53,300	31.0%	31,800	17.9%	- 40.3%	- 42.3%
Southeast	15,200	8.8%	13,500	7.6%	- 11.2%	- 13.6%
Northeast	58,200	33.8%	54,100	30.5%	- 7.0%	- 9.8%
Midwest	40,000	23.2%	59,300	33.4%	+ 48.3%	+ 44.0%
West <sup>1</sup>	0	0.0%	6,400	3.6%	-	-
Canada <sup>2</sup>	1,000	0.6%	4,400	2.5%	+ 340.0%	+ 316.7%
Europe <sup>2</sup>	4,500	2.6%	5,000	2.8%	+ 11.1%	+ 7.7%
C/S America <sup>2</sup>	0	0.0%	2,500	1.4%	-	-
Other	0	0.0%	400	0.3%	-	-
<b>Total</b>	<b>172,200</b>	<b>100.0%</b>	<b>177,400</b>	<b>100.0%</b>		

<sup>1</sup> Visitation from western U.S. states not separated from "other" category in March 2021.

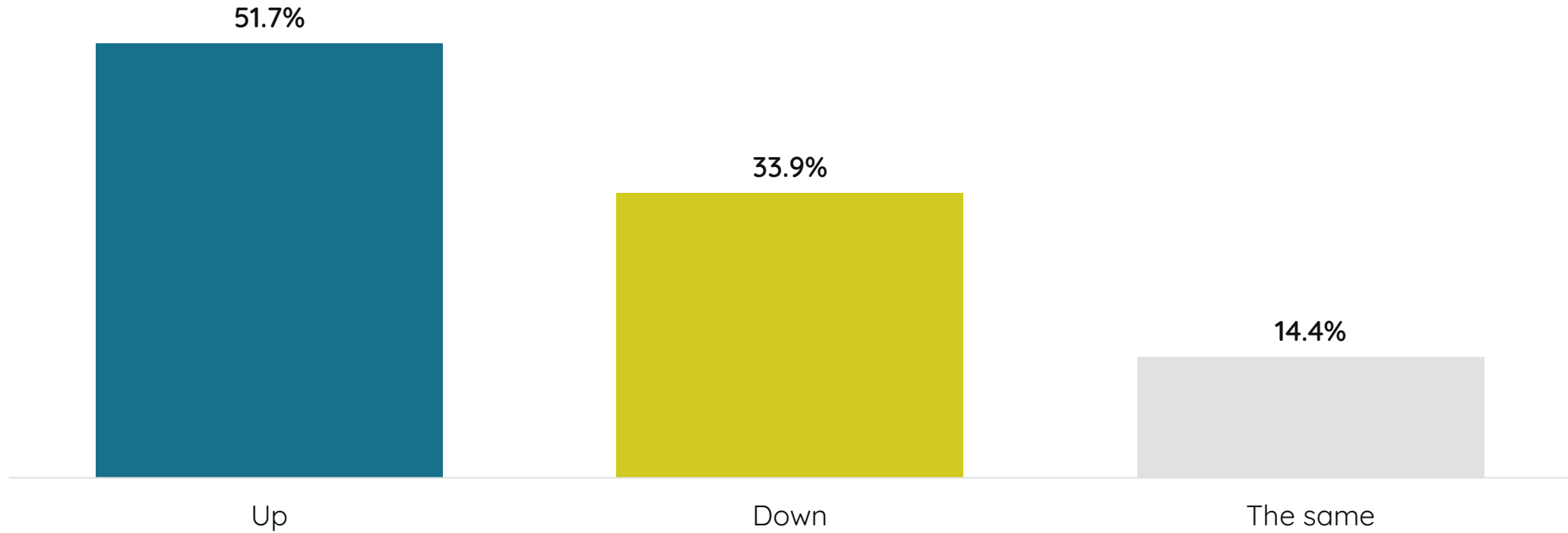
<sup>2</sup> Visitation from international markets was too small to estimate for most of 2020 and 2021.



\* Visitors staying in paid accommodations.



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

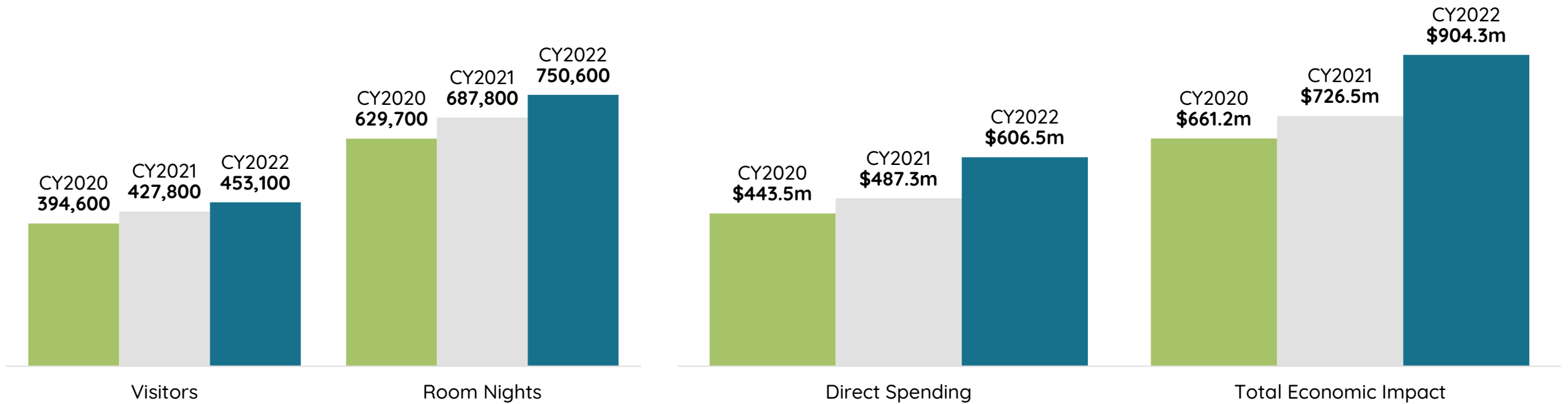


# CALENDAR YEAR- TO-DATE METRICS



# CYTD OVERNIGHT VISITATION & LODGING\*

	CYTD 2020	CYTD 2021	CYTD 2022	% Change from 2020	% Change from 2021
Visitors	394,600	427,800	453,100	+ 14.8%	+ 5.9%
Room Nights	629,700	687,800	750,600	+ 19.2%	+ 9.1%
Direct Spending	\$443,487,800	\$487,271,600	\$606,474,500	+ 36.8%	+ 24.5%
Economic Impact	\$661,240,300	\$726,522,000	\$904,253,500	+ 36.8%	+ 24.5%



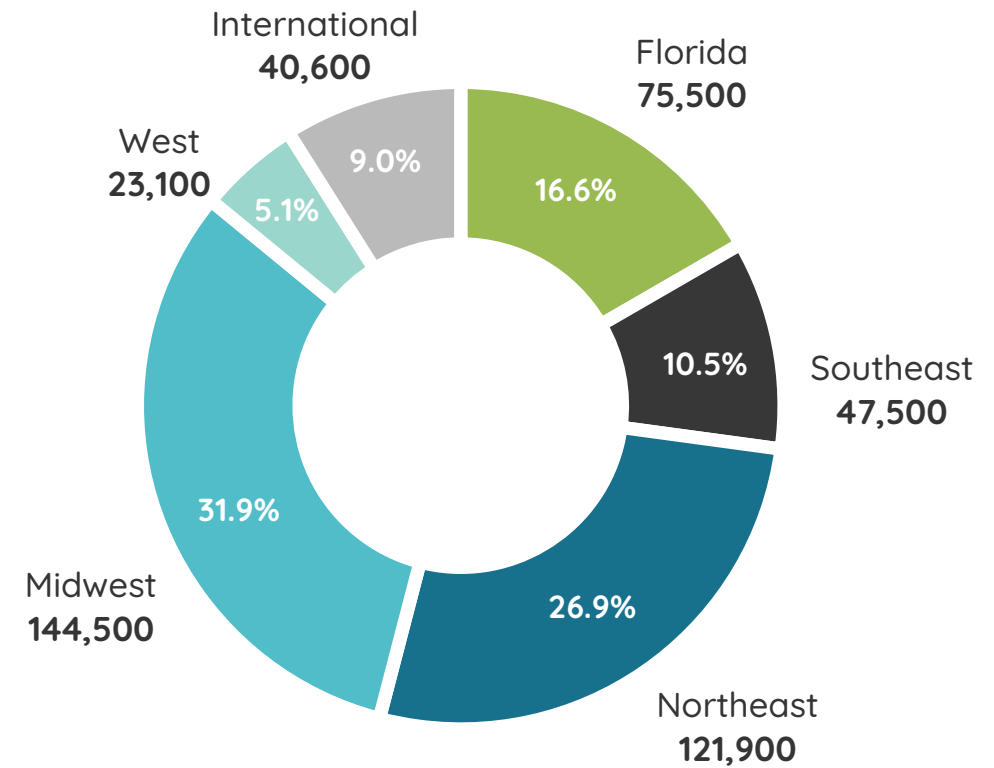
\* Visitors staying in paid accommodations.

# CYTD OVERNIGHT VISITOR ORIGIN MARKETS\*

Region	CY2021		CY2022		Percent Change (Δ%)	
	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	158,000	36.8%	75,500	16.6%	- 52.2%	- 54.9%
Southeast	38,400	9.0%	47,500	10.5%	+ 23.7%	+ 16.7%
Northeast	123,100	28.8%	121,900	26.9%	- 1.0%	- 6.6%
Midwest	92,700	21.7%	144,500	31.9%	+ 55.9%	+ 47.0%
West <sup>1</sup>	0	0.0%	23,100	5.1%	-	-
Canada <sup>2</sup>	2,900	0.7%	10,700	2.4%	+ 269.0%	+ 242.9%
Europe <sup>2</sup>	12,700	3.0%	20,400	4.5%	+ 60.6%	+ 50.0%
C/S America <sup>2</sup>	0	0.0%	5,100	1.1%	-	-
Other	0	0.0%	4,400	1.0%	-	-
<b>Total</b>	<b>427,800</b>	<b>100.0%</b>	<b>453,100</b>	<b>100.0%</b>		

<sup>1</sup> Visitation from western U.S. states not separated from "other" category for most of 2021.

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



\* Visitors staying in paid accommodations.

# MARCH 2022 VISITOR PROFILE

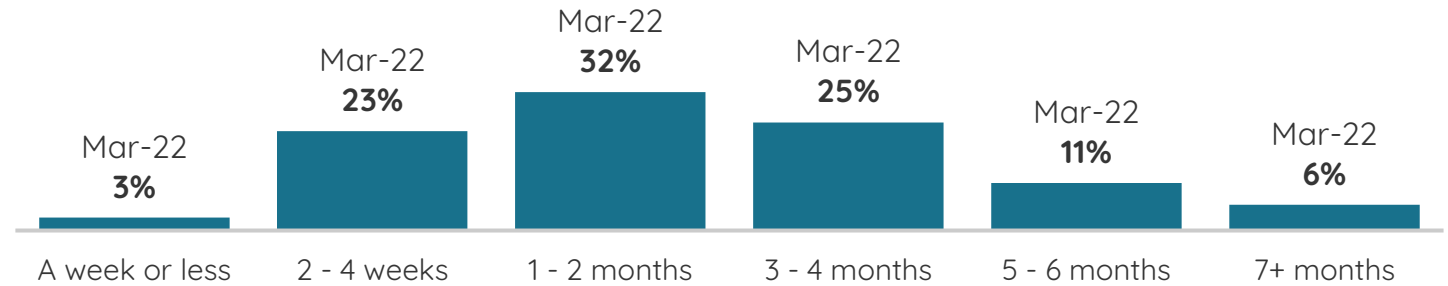
OF OVERNIGHT VISITORS



# TRIP PLANNING DECISIONS\*

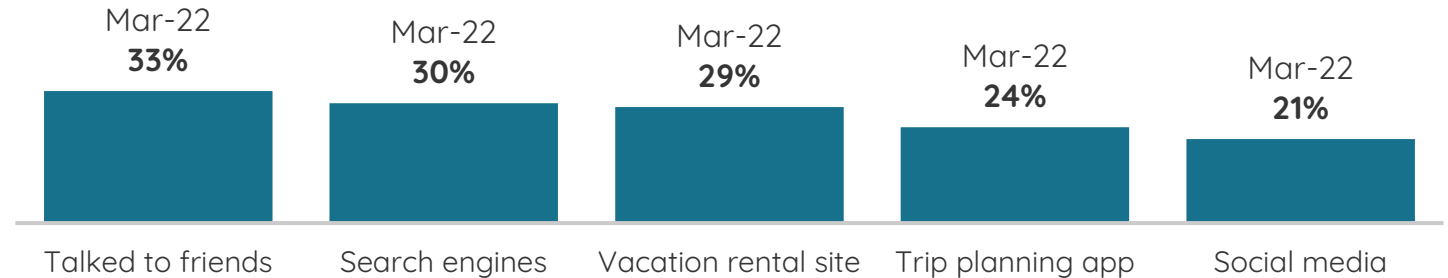
## Trip Planning Cycle

	Mar-21	Mar-22	Trend
A week or less	-	3%	-
2 - 4 weeks	-	23%	-
1 - 2 months	-	32%	-
3 - 4 months	-	25%	-
5 - 6 months	-	11%	-
7+ months	-	6%	-
Median (days)	-	55	-



## Top Trip Planning Resources<sup>1</sup>

	Mar-21	Mar-22	Trend
Talked to friends	-	33%	-
Search engines	-	30%	-
Vacation rental site	-	29%	-
Trip planning app	-	24%	-
Social media	-	21%	-



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

\* Visitors staying in paid accommodations.

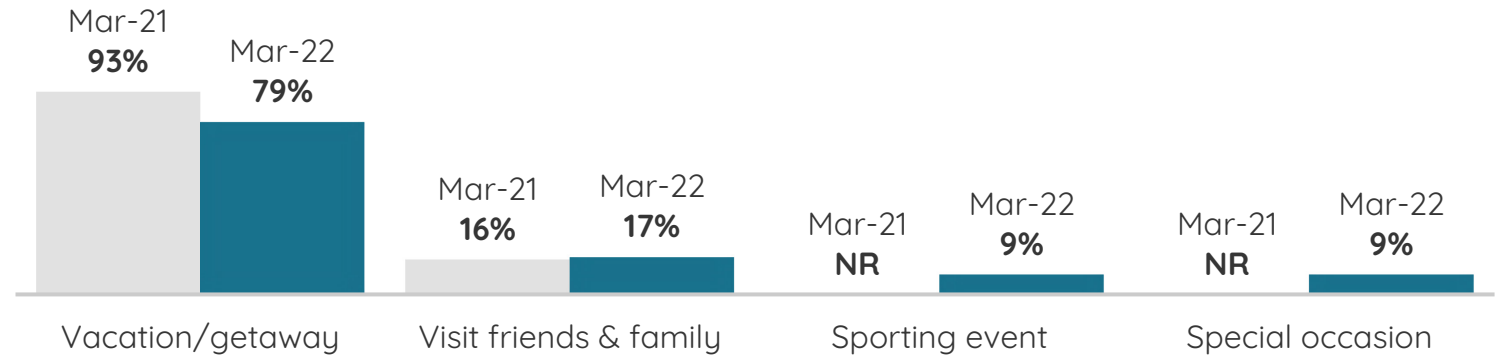


# DECISIONS TO VISIT\*

## Top Reasons for Visiting<sup>1</sup>

	Mar-21	Mar-22	Trend
Vacation/getaway	93%	79%	↓
Visit friends & family	16%	17%	↑
Sporting event	-	9%	-
Special occasion	-	9%	-

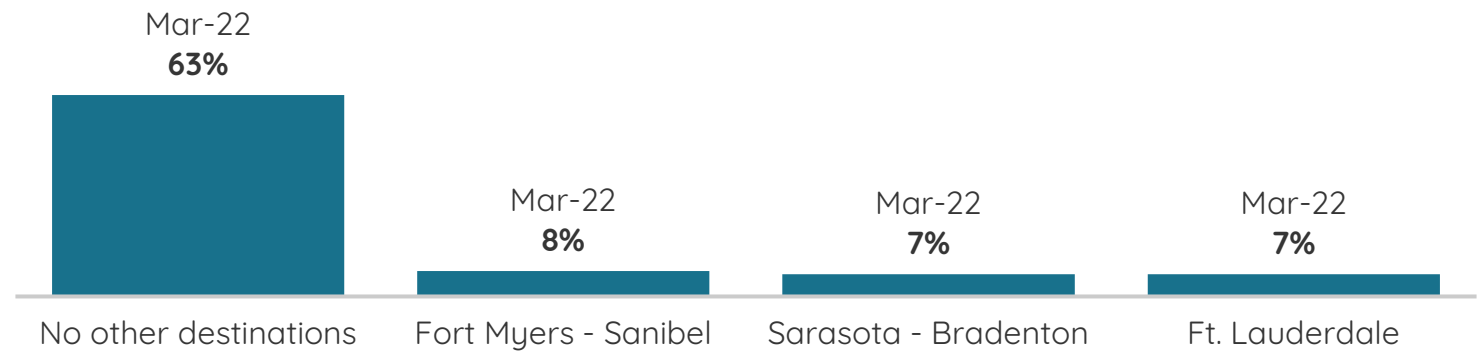
<sup>1</sup> Multiple responses permitted.



## Other Destinations Considered<sup>1</sup>

	Mar-21	Mar-22	Trend
No other destinations	-	63%	-
Fort Myers - Sanibel	-	8%	-
Sarasota - Bradenton	-	7%	-
Ft. Lauderdale	-	7%	-

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



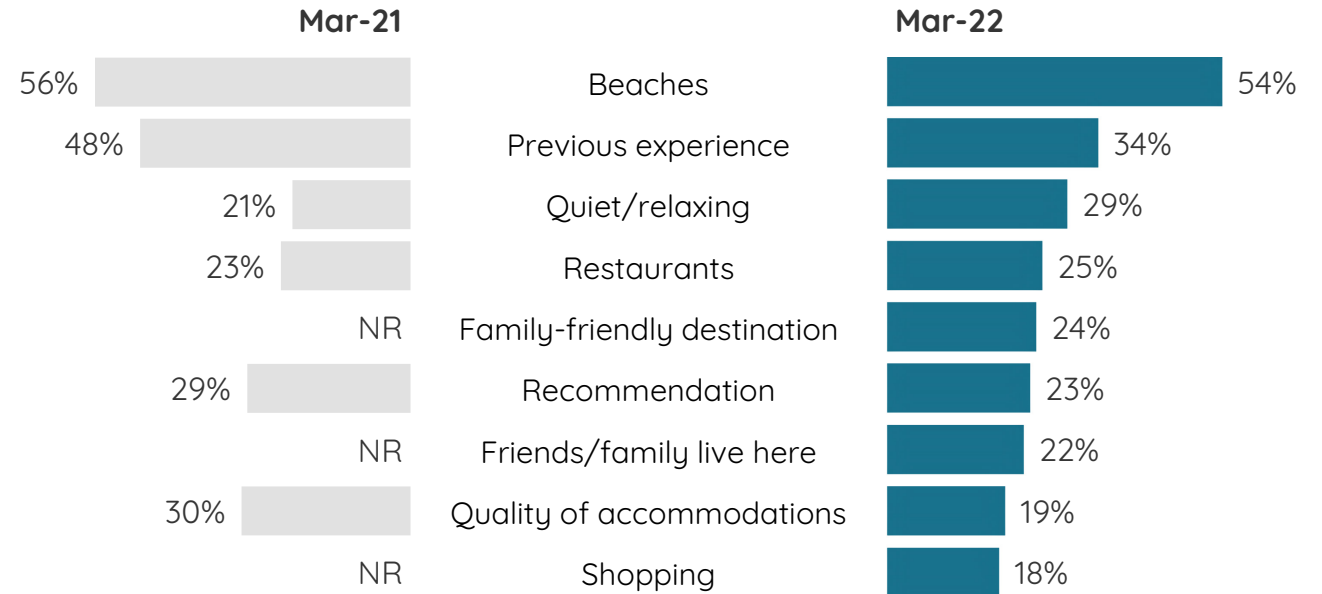
\* Visitors staying in paid accommodations.



# REASONS FOR CHOOSING AREA\*

Reasons for Choosing Area <sup>1</sup>			
	Mar-21	Mar-22	Trend
Beaches	56%	54%	↓
Previous experience	48%	34%	↓
Quiet/relaxing	21%	29%	↑
Restaurants	23%	25%	↑
Family-friendly destination	-	24%	-
Recommendation	29%	23%	↓
Friends/family live here	-	22%	-
Quality of accommodations	30%	19%	↓
Shopping	-	18%	-

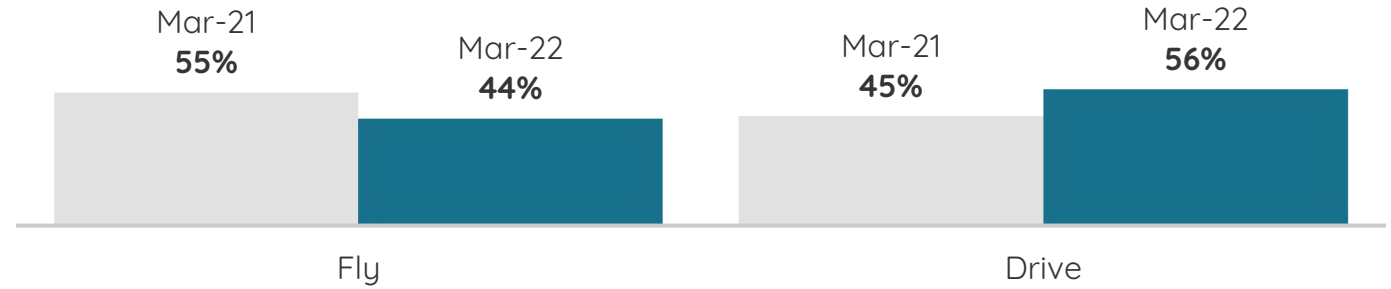
<sup>1</sup> Multiple responses permitted.



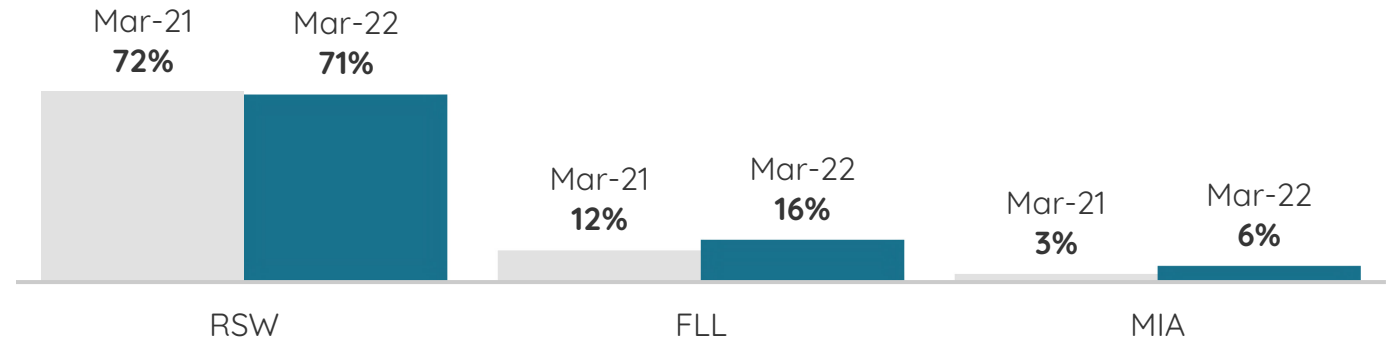
\* Visitors staying in paid accommodations.

# TRANSPORTATION METHODS\*

Mode of Transportation			
	Mar-21	Mar-22	Trend
Fly	55%	44%	↓
Drive	45%	56%	↑



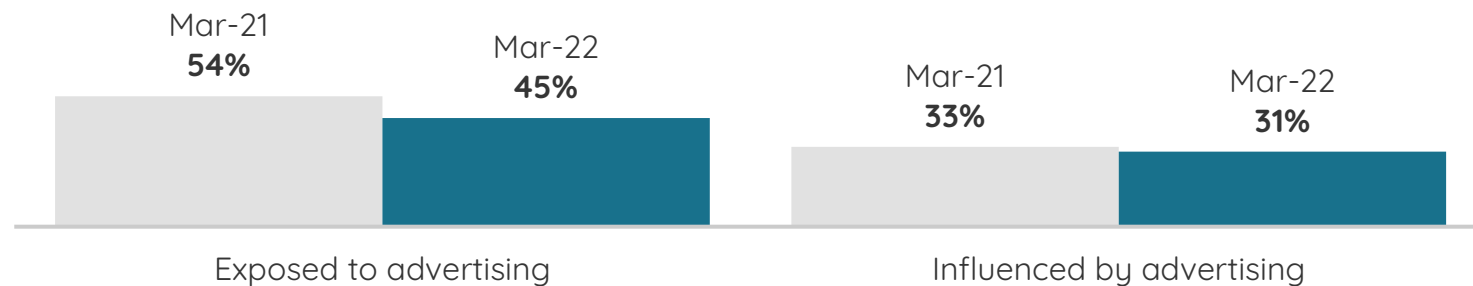
Airport Deplaned (Base: Fly)			
	Mar-21	Mar-22	Trend
SWFL Intl Airport (RSW)	72%	71%	↓
Ft. Lauderdale Intl Airport (FLL)	12%	16%	↑
Miami Intl Airport (MIA)	3%	6%	↑



\* Visitors staying in paid accommodations.

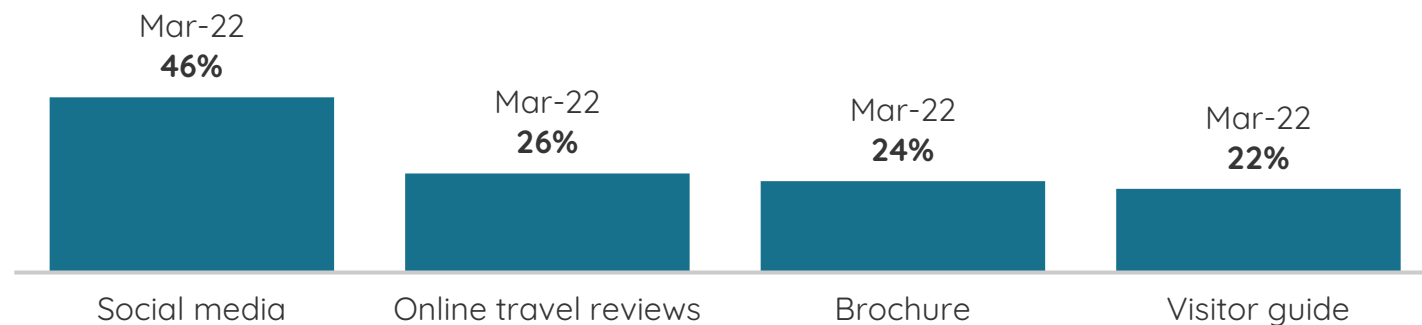
# EXPOSURE TO ADVERTISING\*

Advertising Exposure & Influence			
	Mar-21	Mar-22	Trend
Exposed to advertising	54%	45%	↓
Influenced by advertising	33%	31%	↓



Top Advertising Sources Noticed <sup>1</sup>			
	Mar-21	Mar-22	Trend
Social media	-	46%	-
Online travel reviews	-	26%	-
Brochure	-	24%	-
Visitor guide	-	22%	-

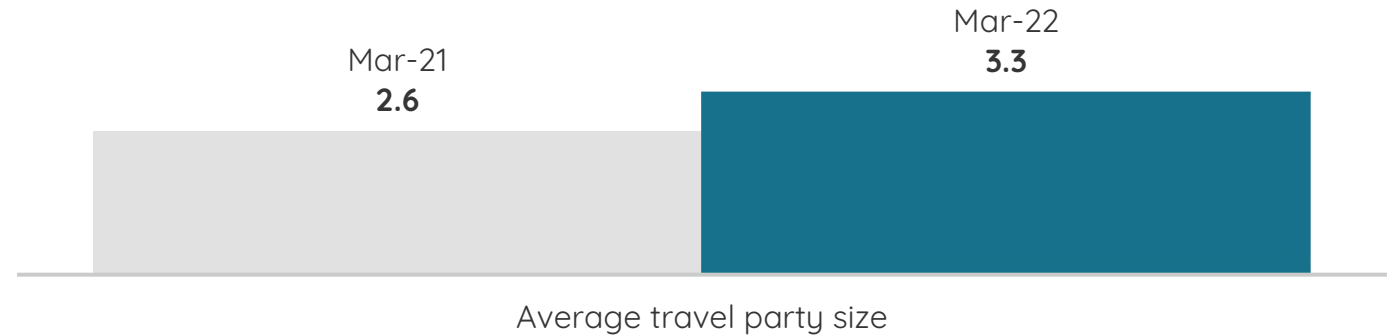
<sup>1</sup>Base of visitors exposed to advertising. Multiple responses permitted.



\* Visitors staying in paid accommodations.

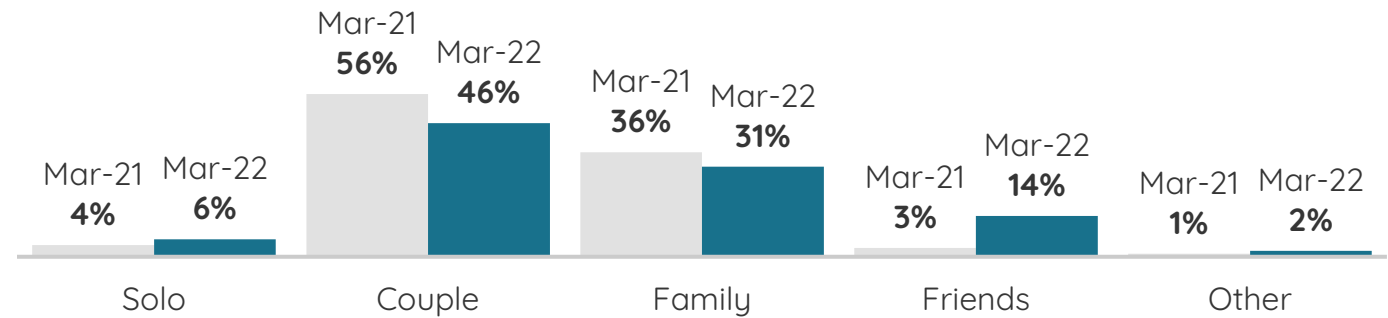
## Average Visitors per Travel Party

	Mar-21	Mar-22	Trend
Average travel party size	2.6	3.3	↑



## Travel Party Composition

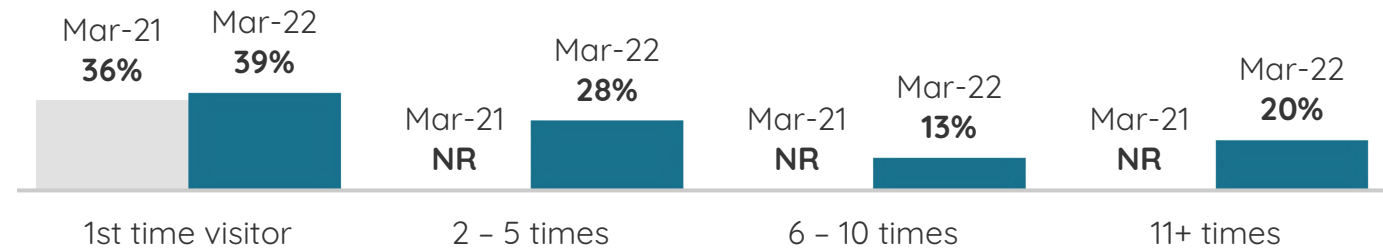
	Mar-21	Mar-22	Trend
Solo	4%	6%	↑
Couple	56%	46%	↓
Family	36%	31%	↓
Friends	3%	14%	↑
Other	1%	2%	↑



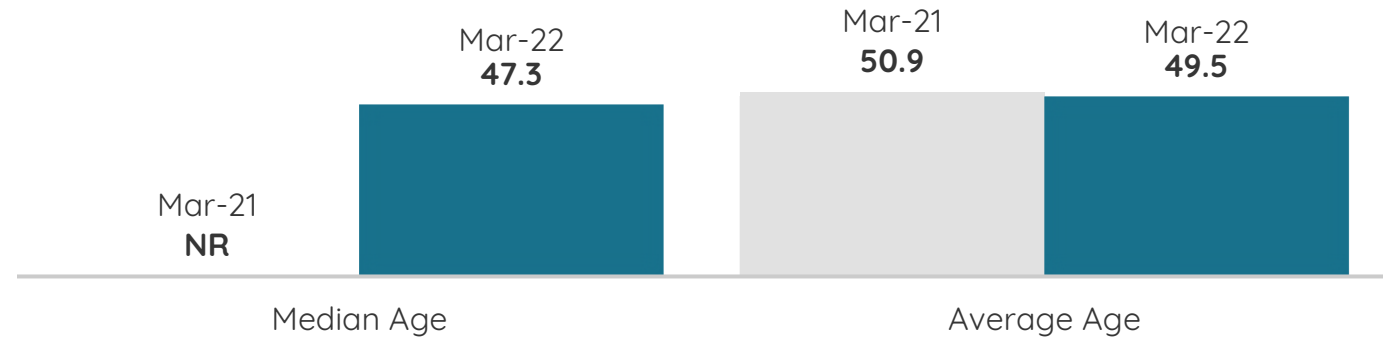
\* Visitors staying in paid accommodations.

# VISITING PARADISE COAST\*

Previous Visits			
	Mar-21	Mar-22	Trend
1 <sup>st</sup> time visitor	36%	39%	↑
2 – 5 times	-	28%	-
6 – 10 times	-	13%	-
11+ times	-	20%	-



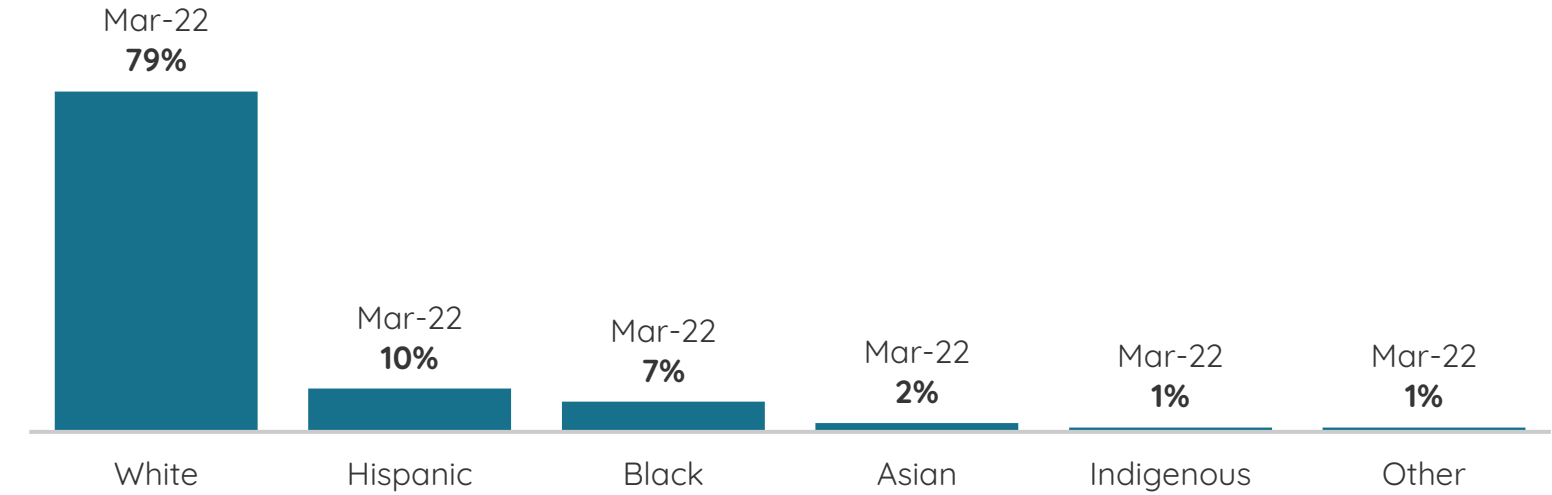
Typical Visitor Ages			
	Mar-21	Mar-22	Trend
Median Age	-	47.3	-
Average Age	50.9	49.5	↓



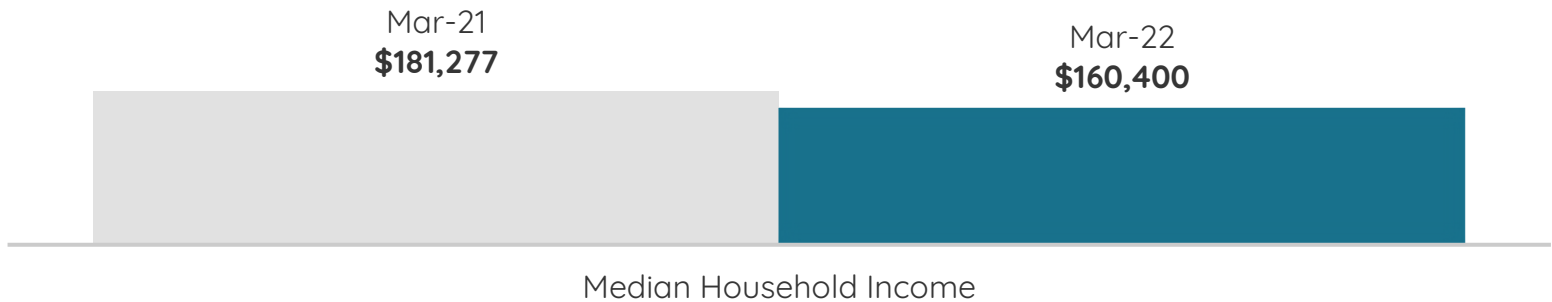
\* Visitors staying in paid accommodations.

# VISITOR DEMOGRAPHICS\*

Race/Ethnicity			
	Mar-21	Mar-22	Trend
White	-	79%	-
Hispanic	-	10%	-
Black	-	7%	-
Asian	-	2%	-
Indigenous	-	1%	-
Other	-	1%	-



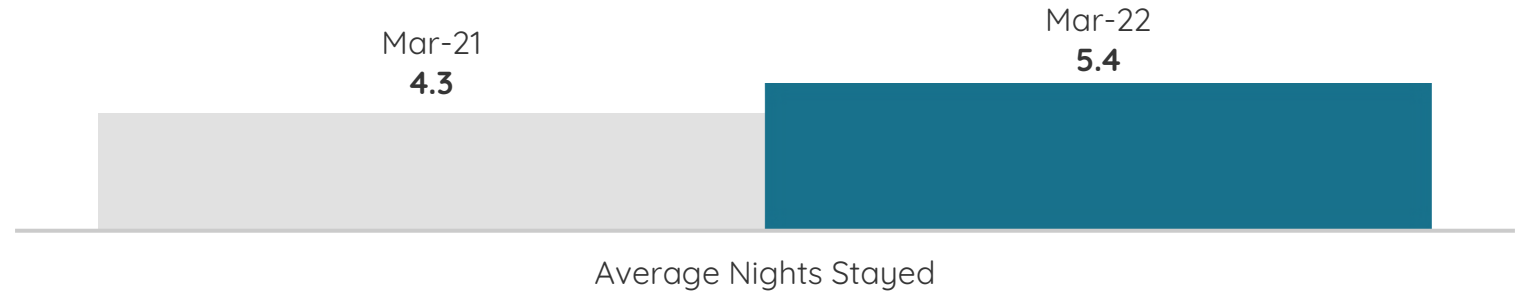
Typical Visitor Household Income			
	Mar-21	Mar-22	Trend
Median HHI	\$181,277	\$160,400	↓



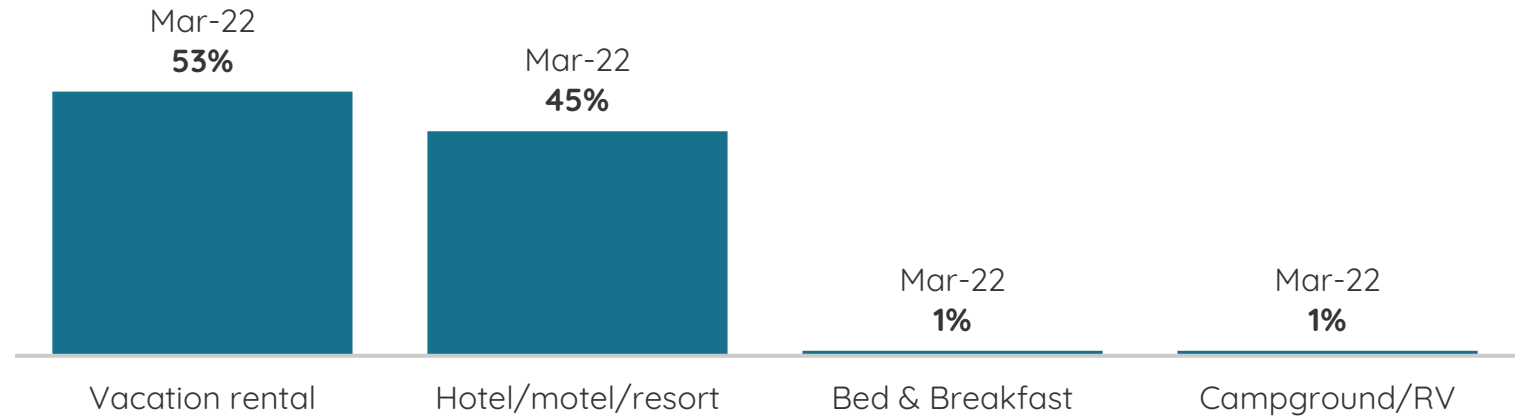
\* Visitors staying in paid accommodations.

# OVERNIGHT VISITS\*

Nights in Destination			
	Mar-21	Mar-22	Trend
Nights Stayed (mean)	4.3	5.4	↑



Accommodations			
	Mar-21	Mar-22	Trend
Vacation rental	-	53%	-
Hotel/motel/resort	-	45%	-
Bed & Breakfast	-	1%	-
Campground/RV	-	1%	-



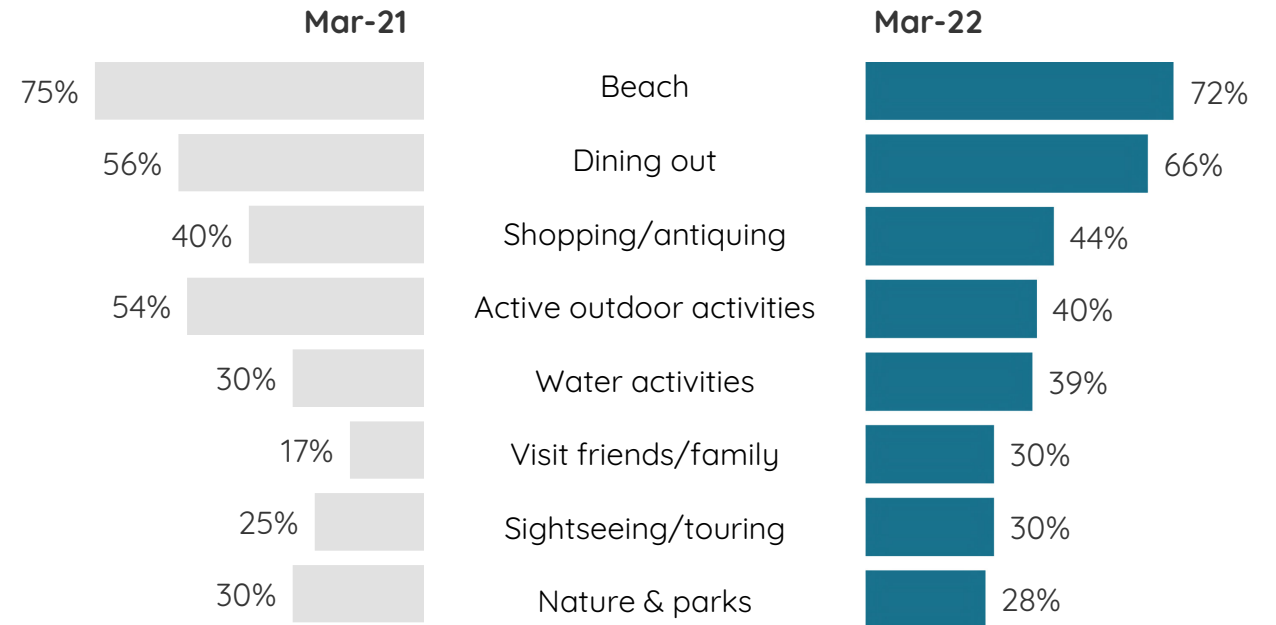
\* Visitors staying in paid accommodations.



# TRIP ACTIVITIES\*

Trip Activities <sup>1</sup>			
	Mar-21	Mar-22	Trend
Beach	75%	72%	↓
Dining out	56%	66%	↑
Shopping/antiquing	40%	44%	↑
Active outdoor activities	54%	40%	↓
Water activities	30%	39%	↑
Visit friends/family	17%	30%	↑
Sightseeing/touring	25%	30%	↑
Nature & parks	30%	28%	↓

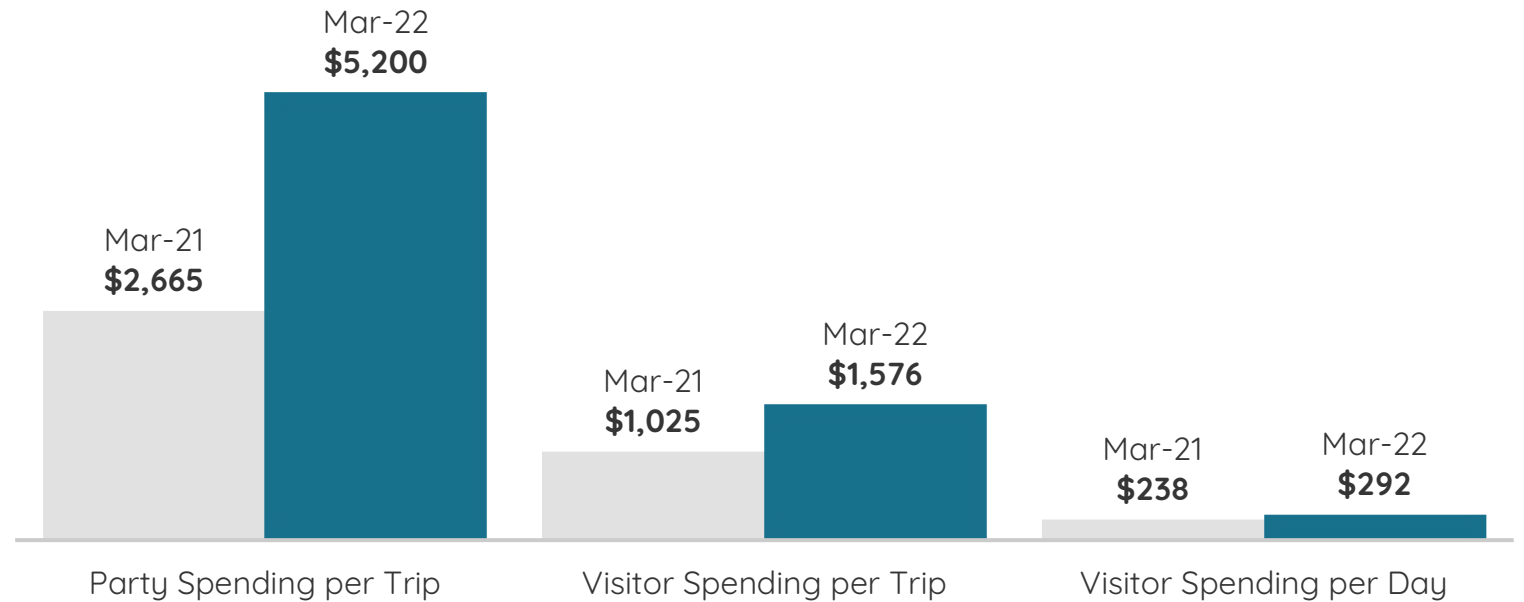
<sup>1</sup> Multiple responses permitted.



\* Visitors staying in paid accommodations.

# VISITOR SPENDING\*

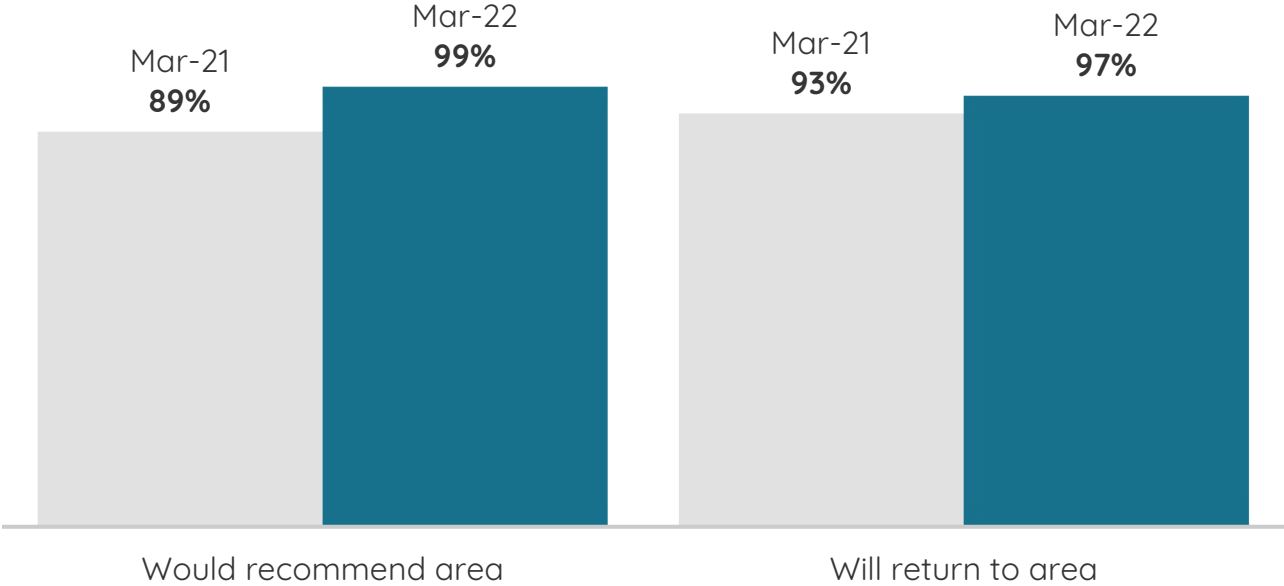
Visitor Spending			
	Mar-21	Mar-22	Trend
Party Spending per Trip	\$2,665	\$5,200	↑
Visitor Spending per Trip	\$1,025	\$1,576	↑
Visitor Spending per Day	\$238	\$292	↑



\* Visitors staying in paid accommodations.

Satisfaction with Destination			
	Mar-21	Mar-22	Trend
Value for travel dollar <sup>1</sup>	-	8.9	-
Would recommend area	89%	99%	↑
Will return to area	93%	97%	↑

<sup>1</sup>10-point scale where 10 is “excellent” and 1 is “poor”.

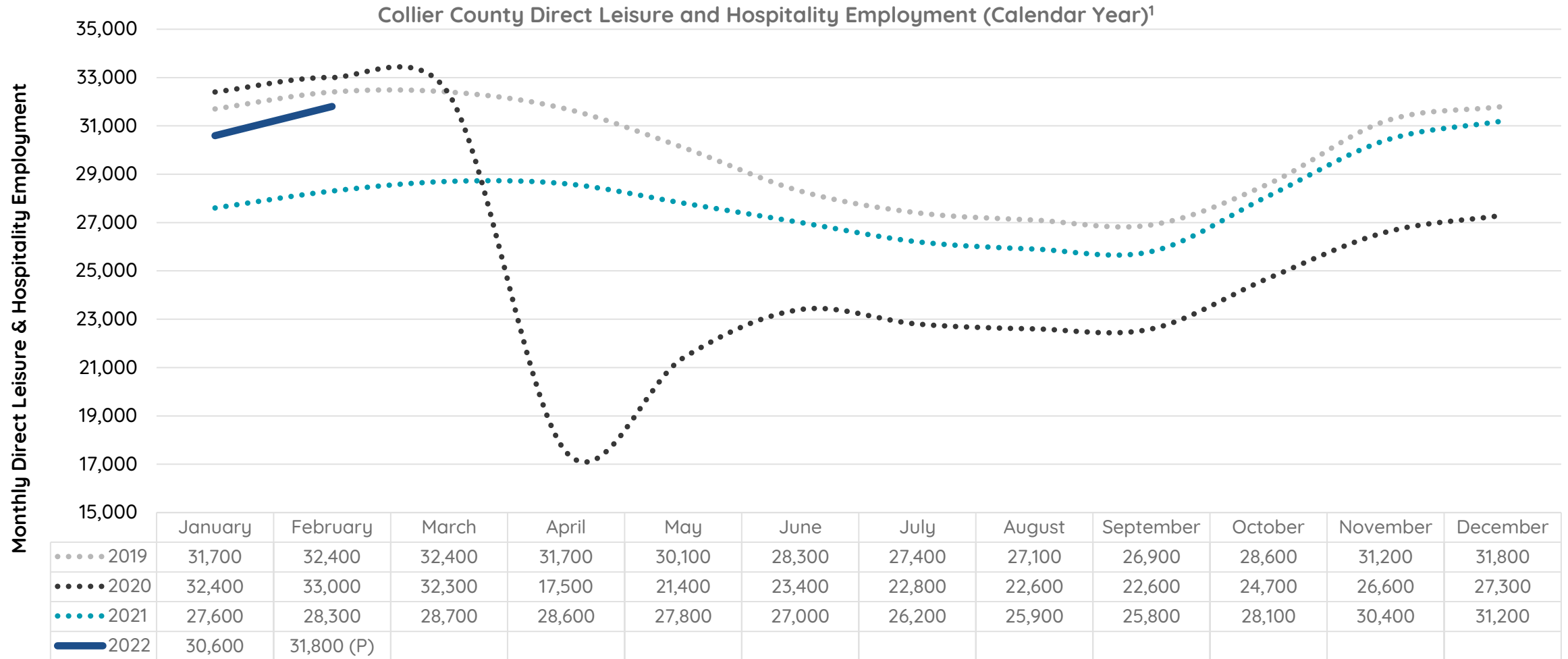


\* Visitors staying in paid accommodations.

# INDUSTRY DATA



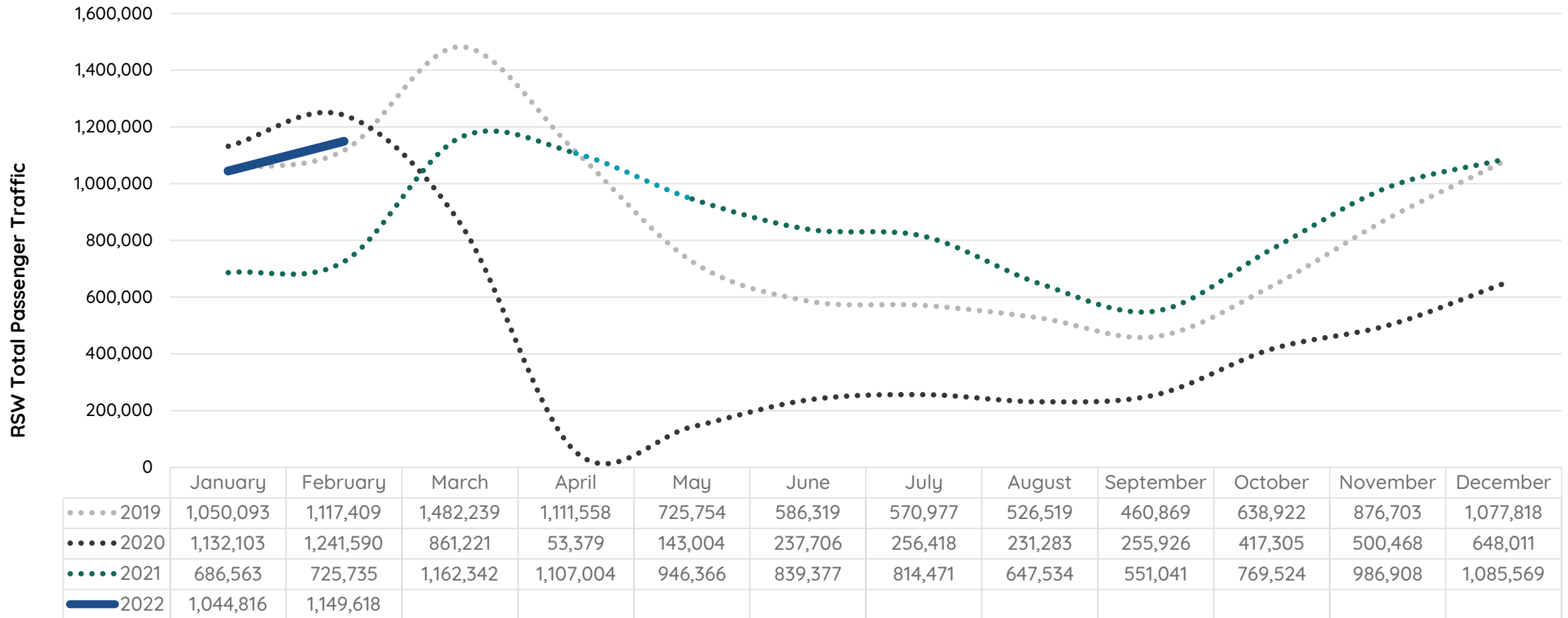
# LEISURE & HOSPITALTY EMPLOYMENT



<sup>1</sup>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



<sup>1</sup>SOURCE: Lee County Port Authority Monthly Statistics.

# LICENSED TRANSIENT RENTAL UNITS

March 2022 Licensed Transient Rental Units <sup>1</sup>				
	Hotel	Motel	Vacation Rental	Total
Naples	4,218	1,357	2,914	8,489
Marco Island	1,378	115	1,546	3,039
Immokalee	0	55	104	159
Golden Gate	0	150	0	150
Everglades City	38	36	14	88
Bonita Springs	0	5	59	64
Goodland	0	5	3	8
Chokoloskee	0	5	1	6
Ochopee	0	0	2	2
Ave Maria	0	0	1	1
<b>Total</b>	<b>5,634</b>	<b>1,728</b>	<b>4,644</b>	<b>12,006</b>

<sup>1</sup>SOURCE: Florida Department of Business & Professional Regulation.



# NAPLES, MARCO ISLAND, EVERGLADES

## Convention & Visitors Bureau March 2022 Monthly Dashboard

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