

NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau
March 2023 Monthly Dashboard





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



Visitation, lodging metrics, and spending in March 2023 saw decreases when compared to the record-breaking March 2022. Worries about red tide and finances also contributed to the decrease.



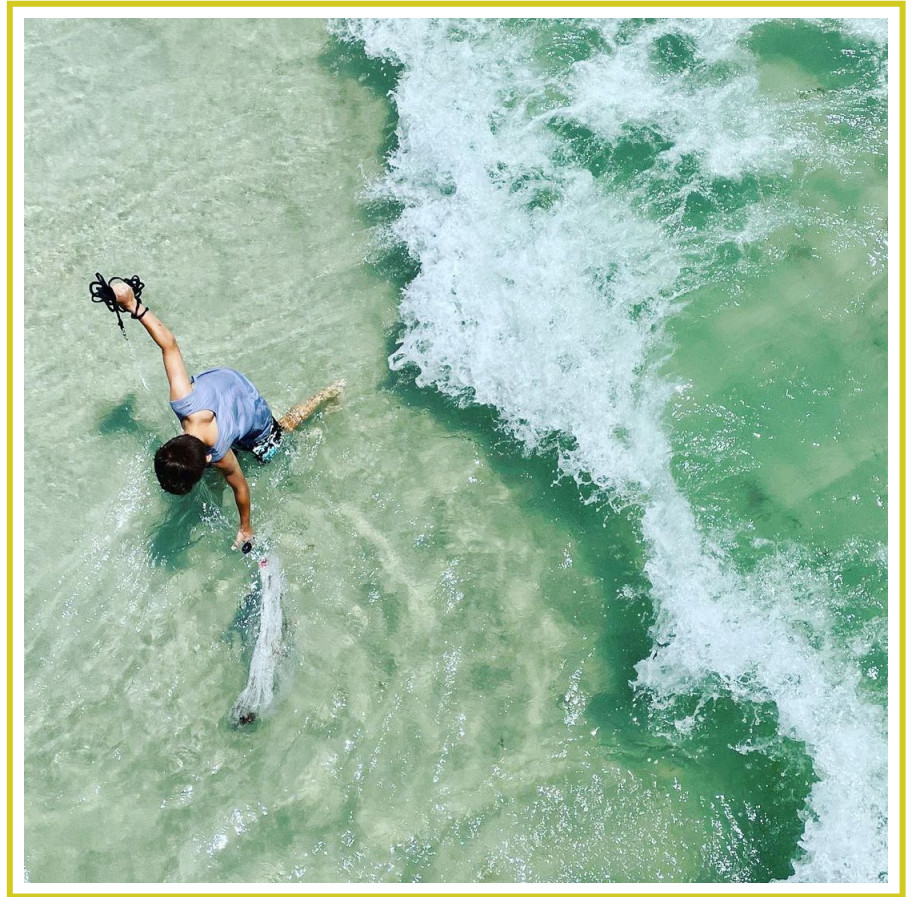
Significantly more visitors considered the Fort Myers/Sanibel Island before selecting Florida's Paradise Coast as their destination. This is likely due to hurricane recovery.



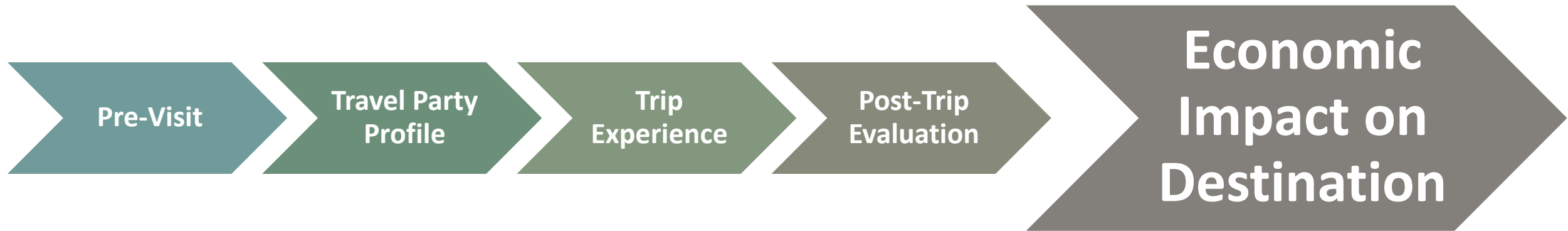
There were fewer first-time visitors in March 2023 compared to March 2022, likely due to concerns about red tide.



The average rating for the value for the travel dollar reached the highest level (8.7 on a 10-point scale) since the storm in late September 2022.



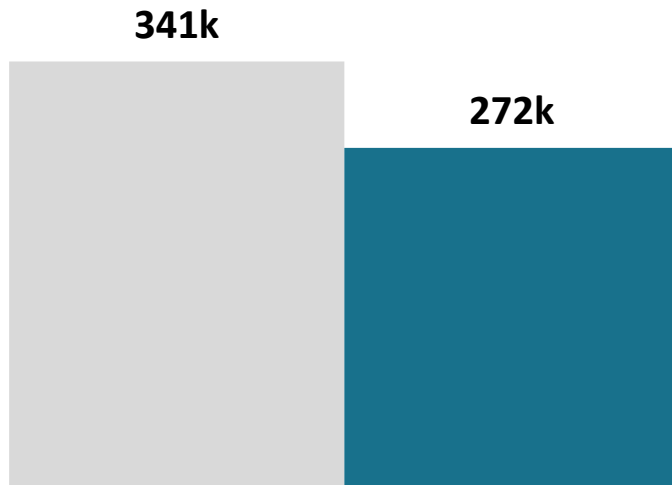
VISITOR JOURNEY: ECONOMIC IMPACT



MARCH 2023 VISITATION & ROOM NIGHTS

VISITORS

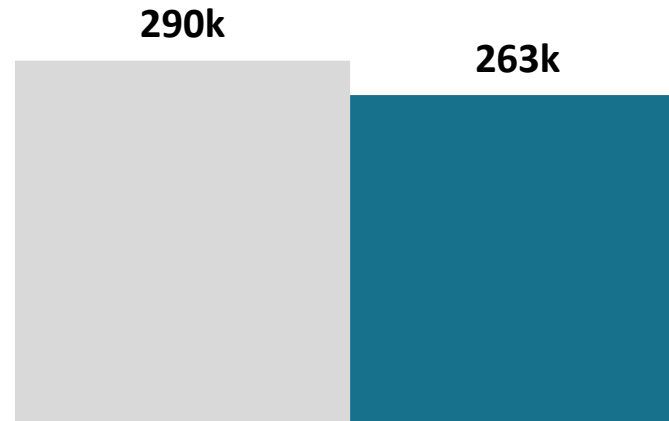
271,700



- 20.4% from 2022

ROOM NIGHTS

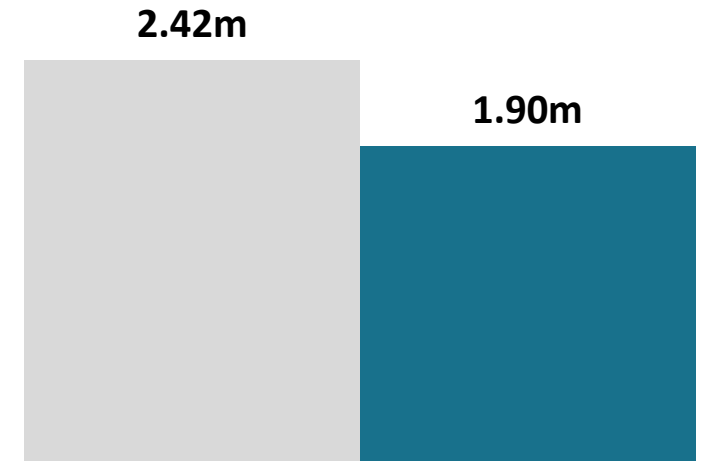
262,700



- 9.5% from 2022

VISITOR DAYS

1,901,900



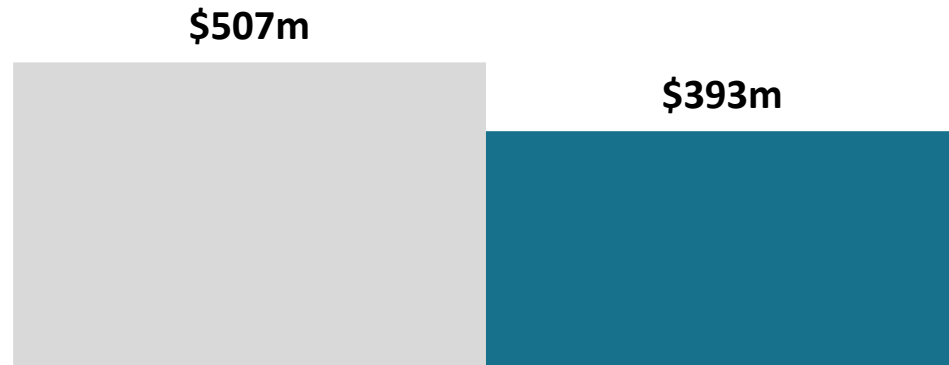
- 21.5% from 2022

■ Mar-22 ■ Mar-23

MARCH 2023 SPENDING & ECONOMIC IMPACT

DIRECT SPENDING

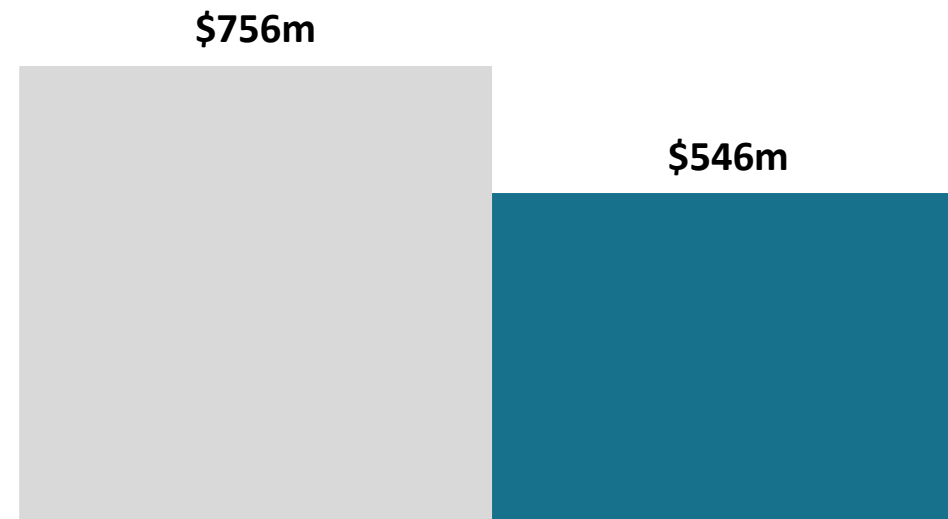
\$393,130,100



- 22.5% from 2022

ECONOMIC IMPACT

\$545,664,600



- 27.8% from 2022¹

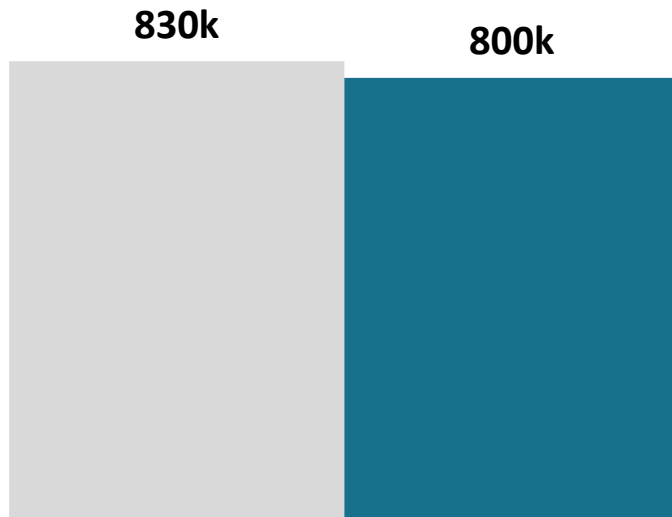
■ Mar-22 ■ Mar-23

¹ The IMPLAN multiplier for Collier County was 1.491 for 2022 and is 1.388 in 2023.

CUMULATIVE VISITATION METRICS

CYTD VISITORS

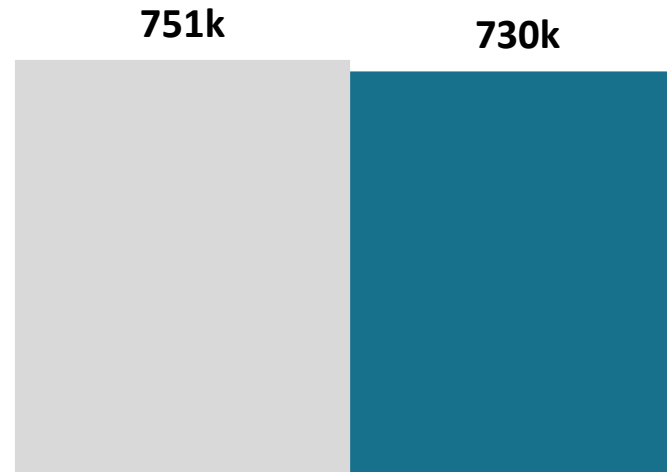
799,700



- 3.6% from 2022

CYTD ROOM NIGHTS

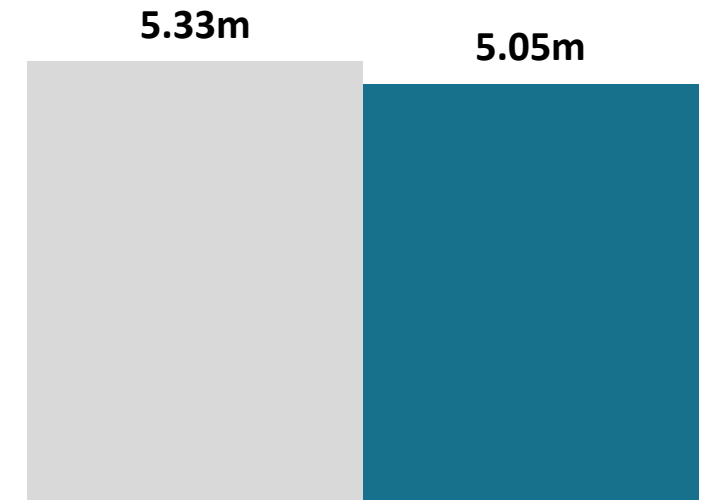
729,900



- 2.8% from 2022

CYTD VISITOR DAYS

5,052,900



- 5.2% from 2022

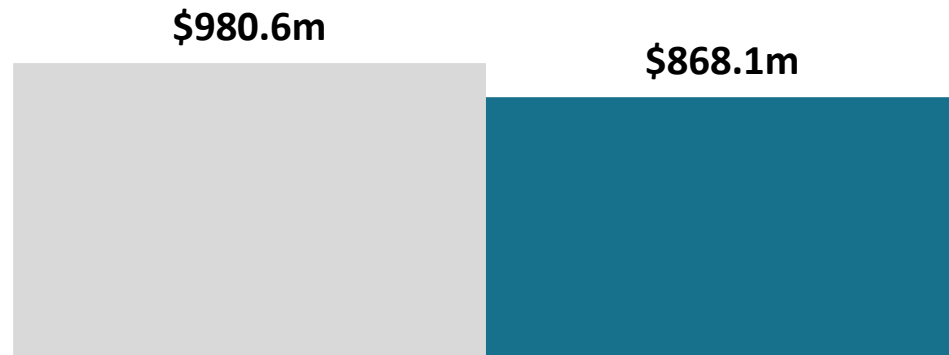
■ Mar-22 ■ Mar-23

CUMULATIVE SPENDING & ECONOMIC IMPACT

CYTD DIRECT SPENDING

\$868,099,100

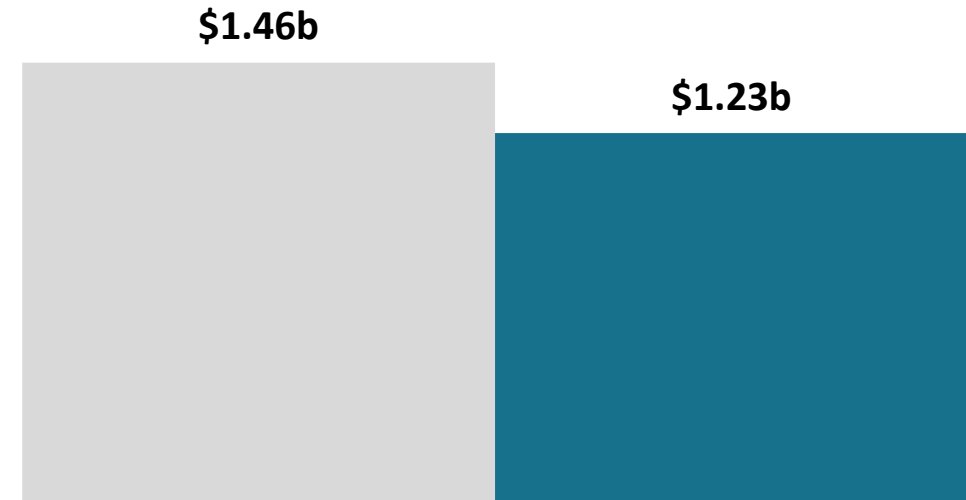
- 11.5% from 2022



CYTD ECONOMIC IMPACT

\$1,228,984,800

- 15.9% from 2022¹



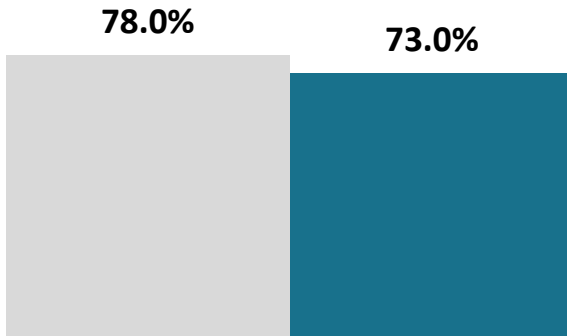
■ Mar-22 ■ Mar-23

¹ The IMPLAN multiplier for Collier County was 1.491 for 2022 and is 1.388 in 2023.

MARCH 2023 OVERALL LODGING METRICS¹

OCCUPANCY RATE

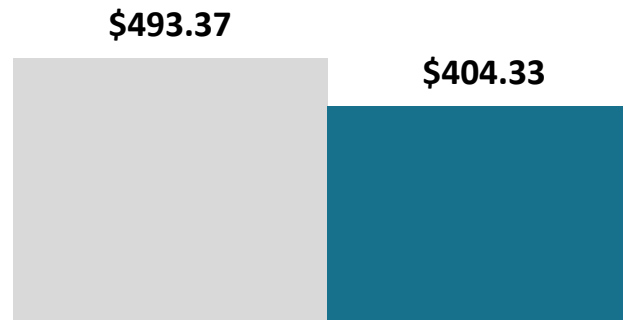
73.0%



- 6.4% from 2022

AVERAGE DAILY RATE

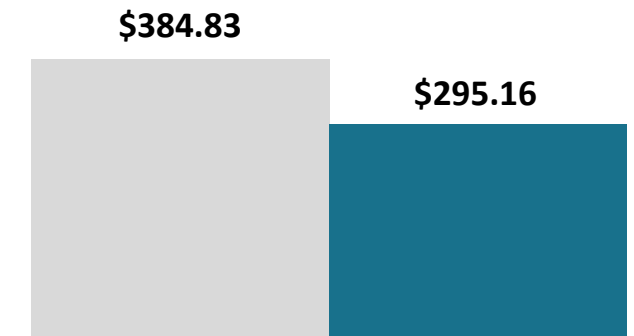
\$404.33



- 18.0% from 2022

REVENUE PER AVAILABLE ROOM

\$295.16



- 23.3% from 2022

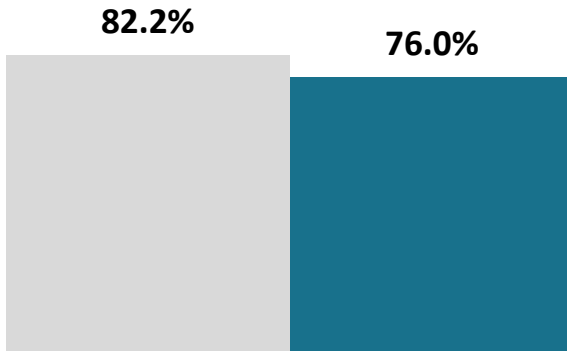
■ Mar-22 ■ Mar-23

¹ Sources: STR, AllTheRooms, and
DSG Occupancy Study data

MARCH 2023 HOTEL LODGING METRICS¹

OCCUPANCY RATE

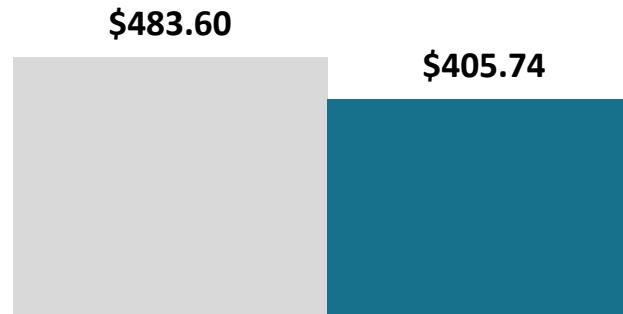
76.0%



- 7.5% from 2022

AVERAGE DAILY RATE

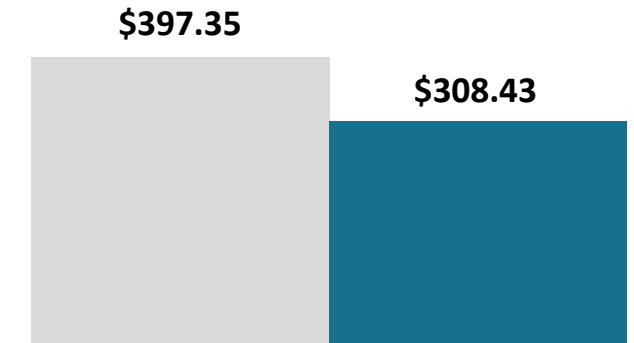
\$405.74



- 16.1% from 2022

REVENUE PER AVAILABLE ROOM

\$308.43

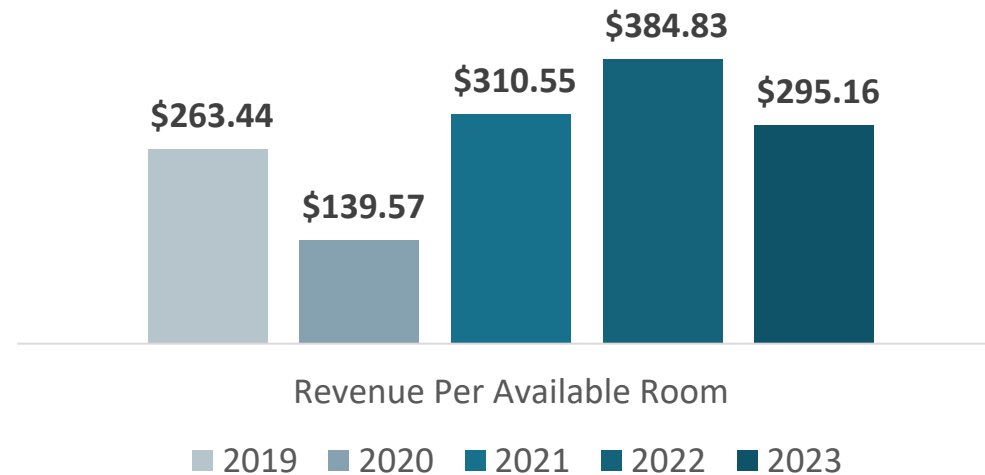
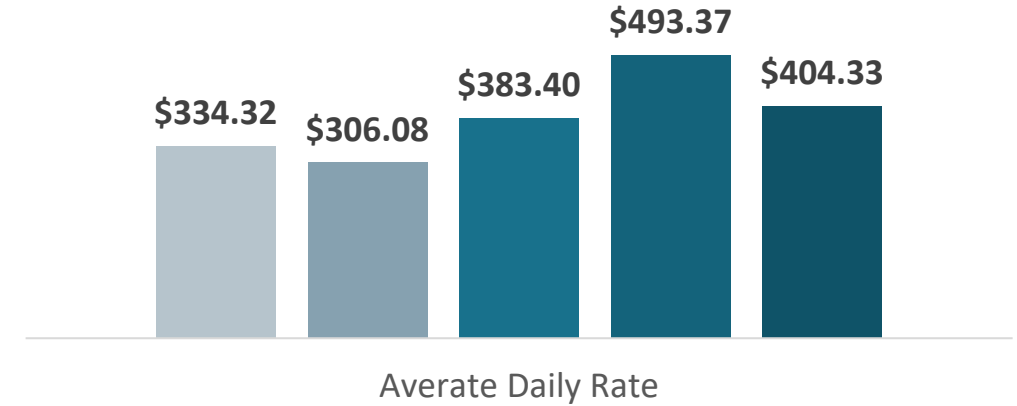
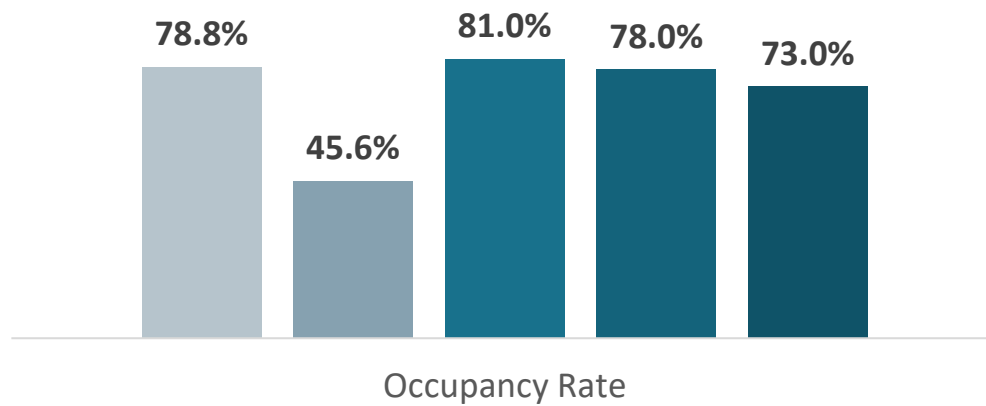


- 22.4% from 2022

■ Mar-22 ■ Mar-23

¹Source: STR Reports

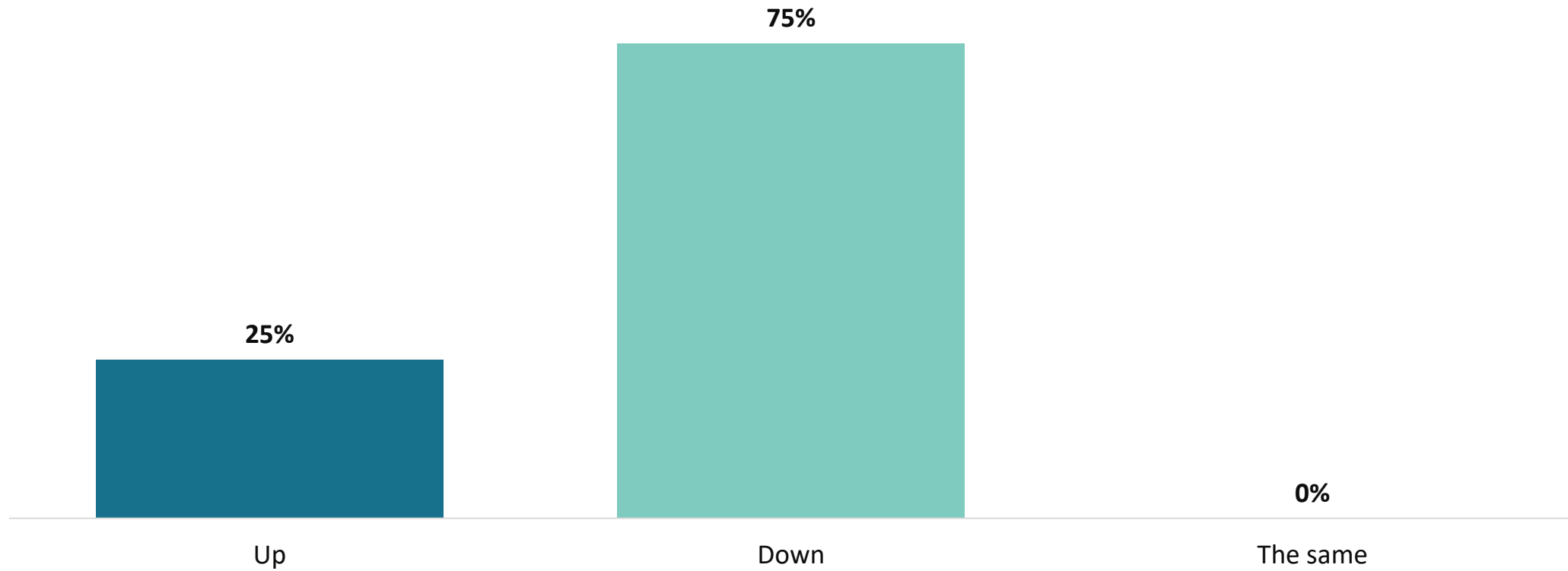
MARCH 2019-2023 OVERALL LODGING METRICS¹



¹ Sources: STR, AllTheRooms, and DSG Occupancy Study data

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?



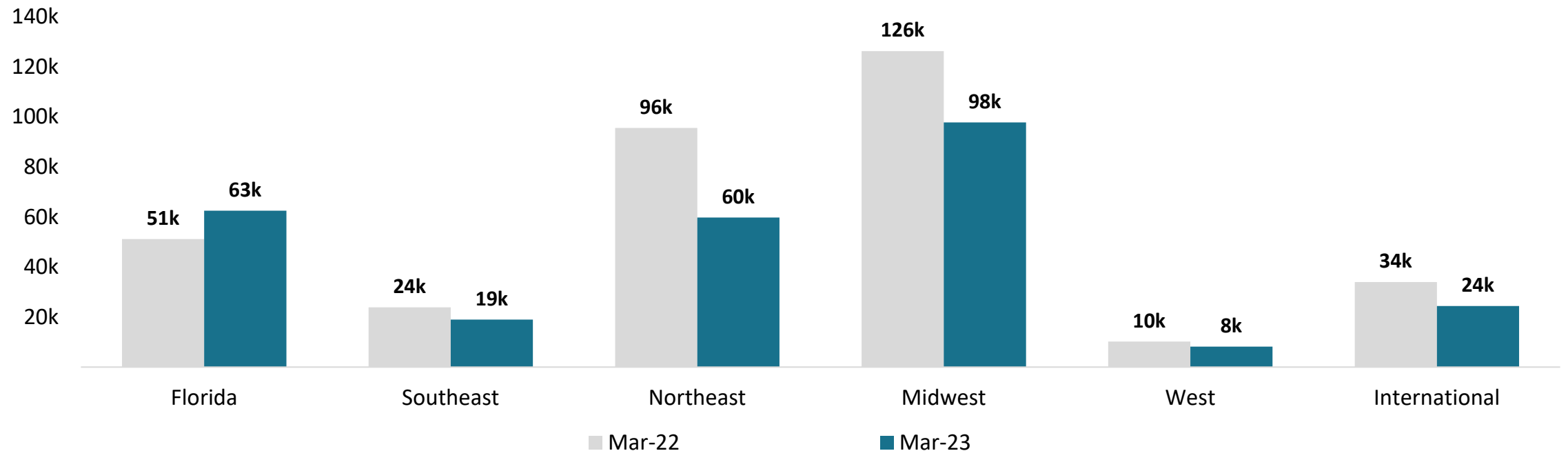
VISITOR ORIGIN

FLORIDA VISITORS

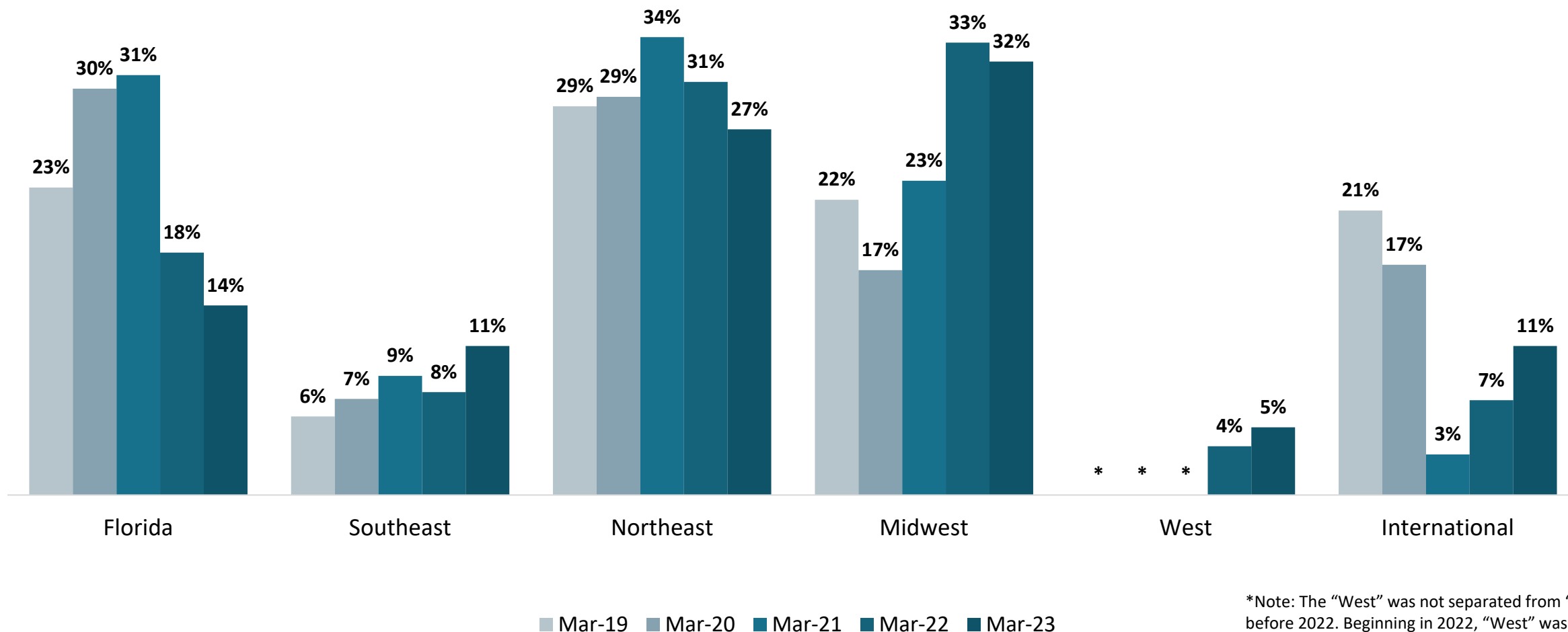
62,500

OUT-OF-STATE VISITORS

209,200

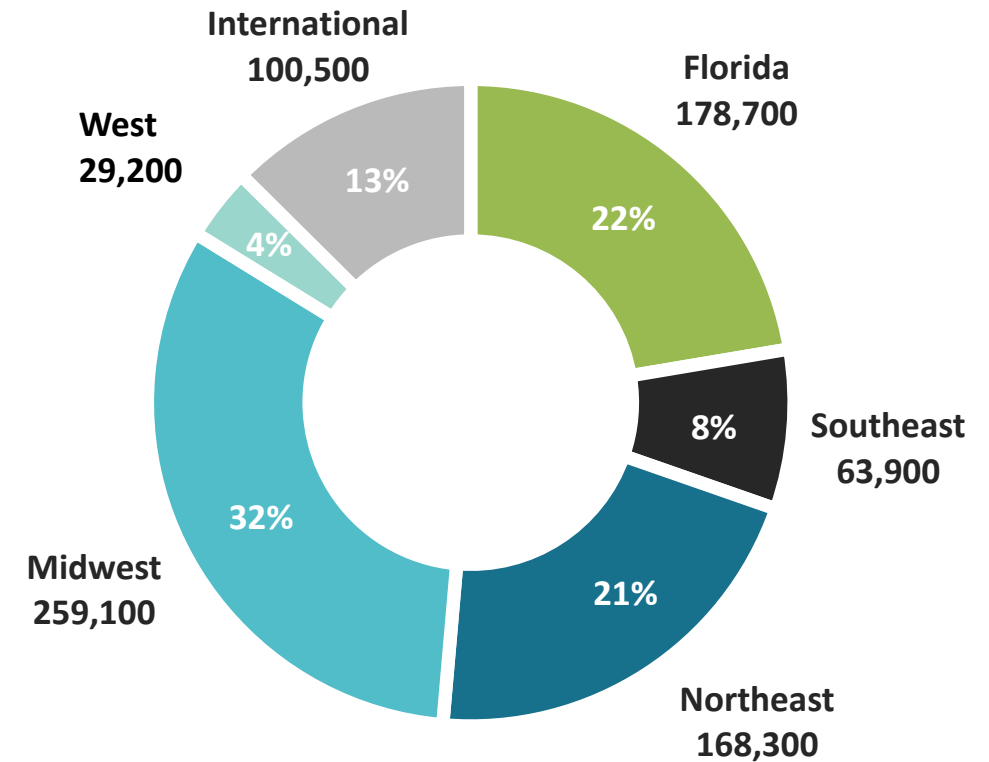


MARCH 2019-2023 OVERNIGHT VISITOR ORIGIN



CYTD 2023 VISITOR ORIGIN MARKETS

Region	CYTD 2022		CYTD 2023		Percent Change (Δ%)	
	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	131,000	15.8%	178,700	22.3%	+ 36.4%	+ 41.5%
Southeast	84,000	10.1%	63,900	8.0%	- 23.9%	- 21.1%
Northeast	212,300	25.6%	168,300	21.0%	- 20.7%	- 17.7%
Midwest	278,700	33.6%	259,100	32.4%	- 7.0%	- 3.5%
West	36,700	4.4%	29,200	3.7%	- 20.4%	- 17.4%
Canada	23,400	2.8%	36,900	4.6%	+ 57.7%	+ 63.6%
Europe	36,700	4.4%	36,800	4.6%	+ 0.3%	+ 4.0%
C/S America	10,900	1.3%	16,100	2.0%	+ 47.7%	+53.3%
Other	16,100	1.9%	10,700	1.3%	- 33.5%	- 31.0%
Total	829,900	100%	799,700	100%		





Pre-Visit

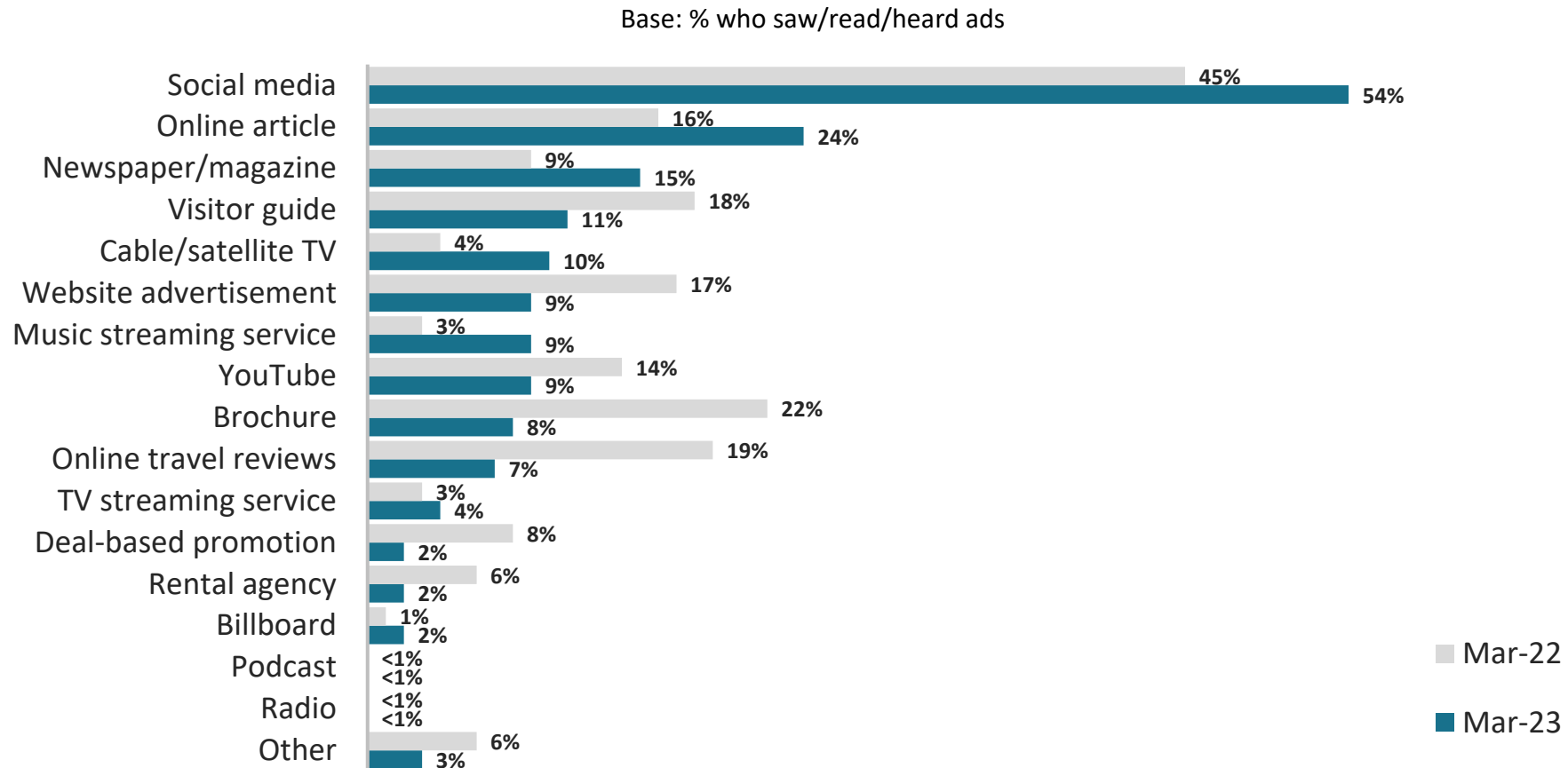
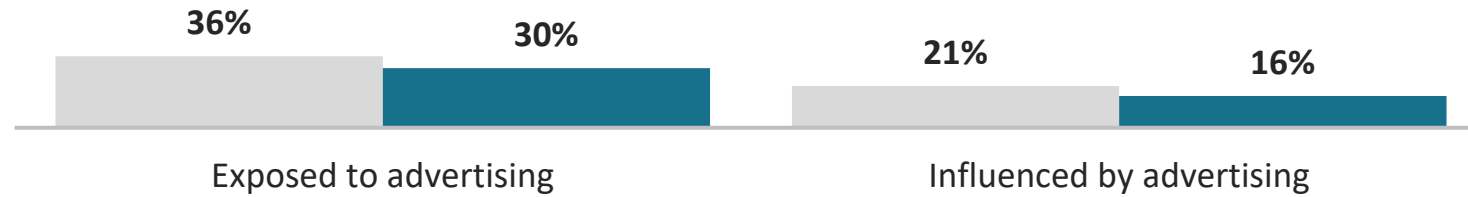
**Travel Party
Profile**

**Trip
Experience**

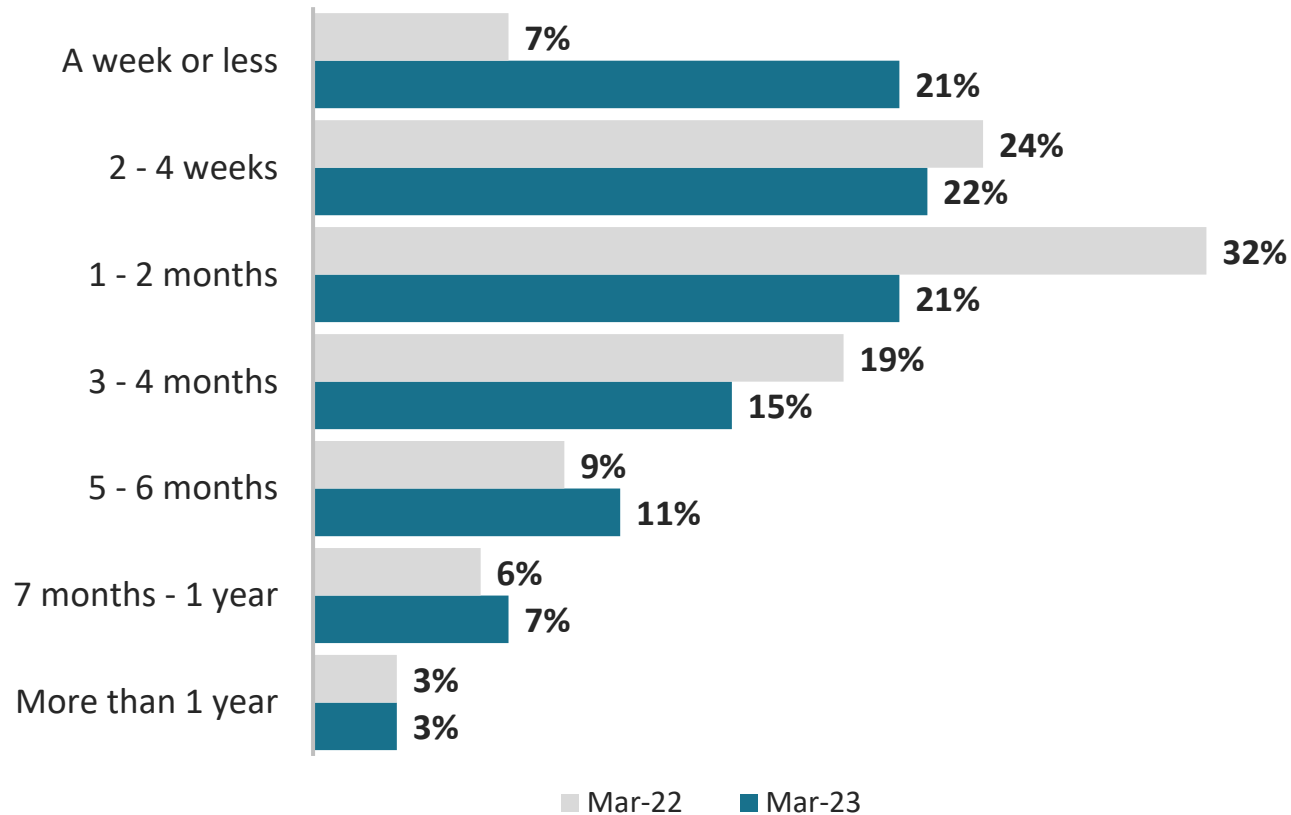
**Post-Trip
Evaluation**

**Economic
Impact on
Destination**

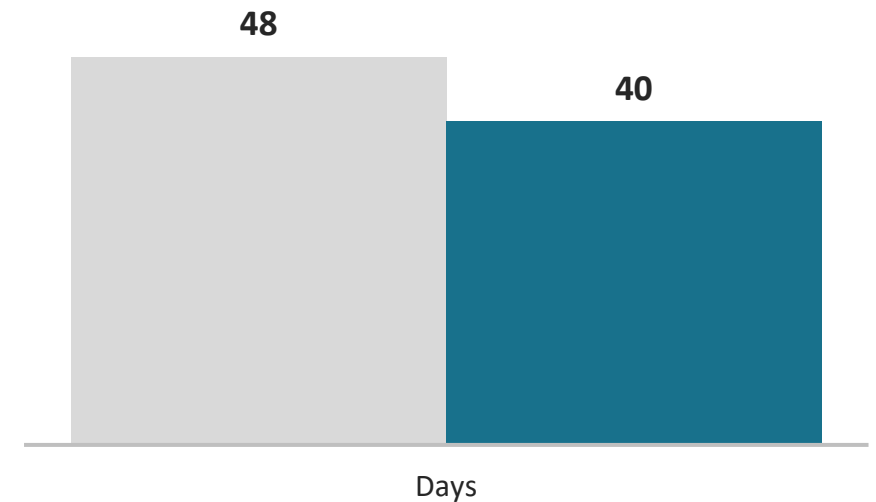
EXPOSURE TO ADVERTISING



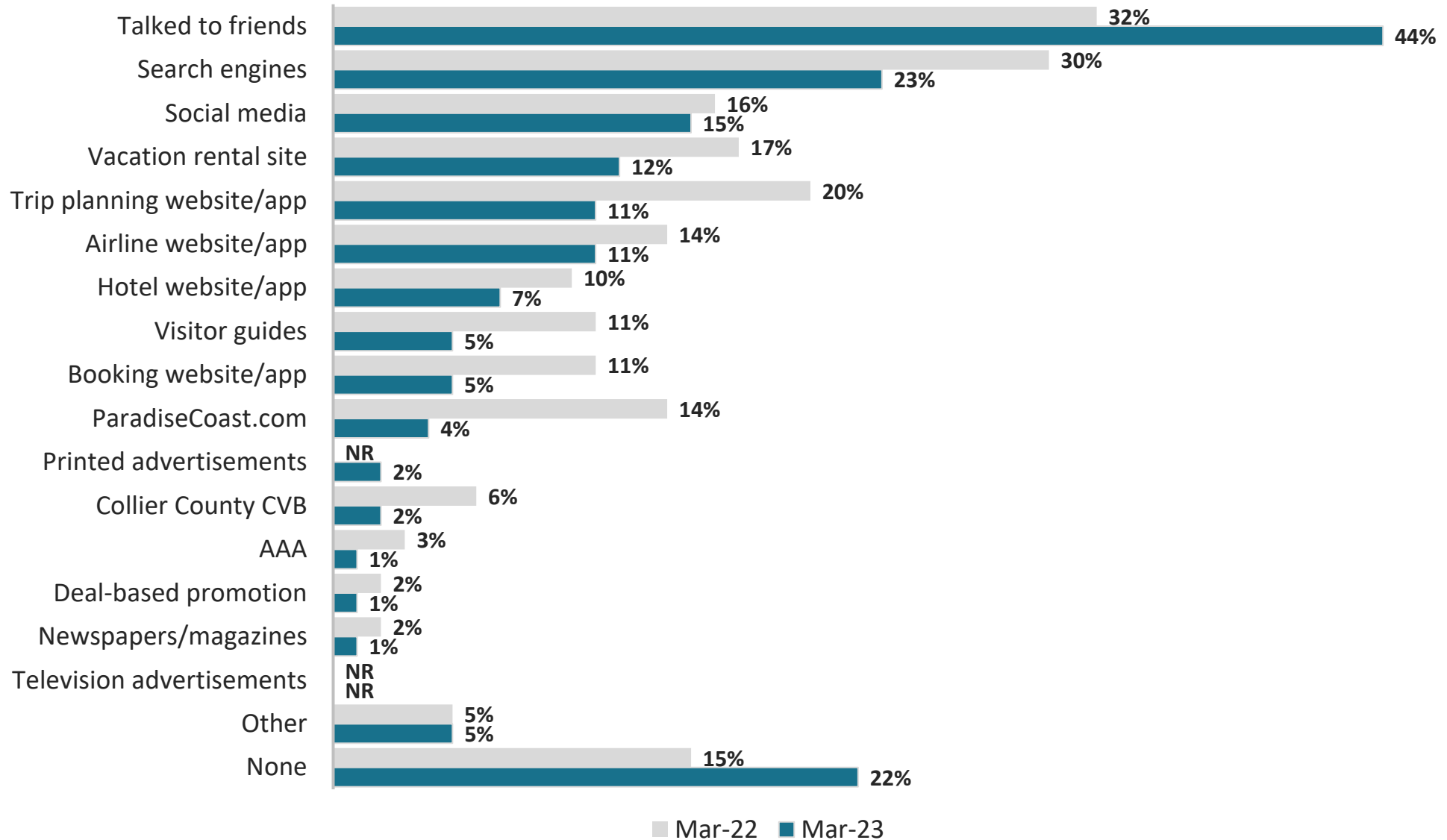
TRIP PLANNING CYCLE



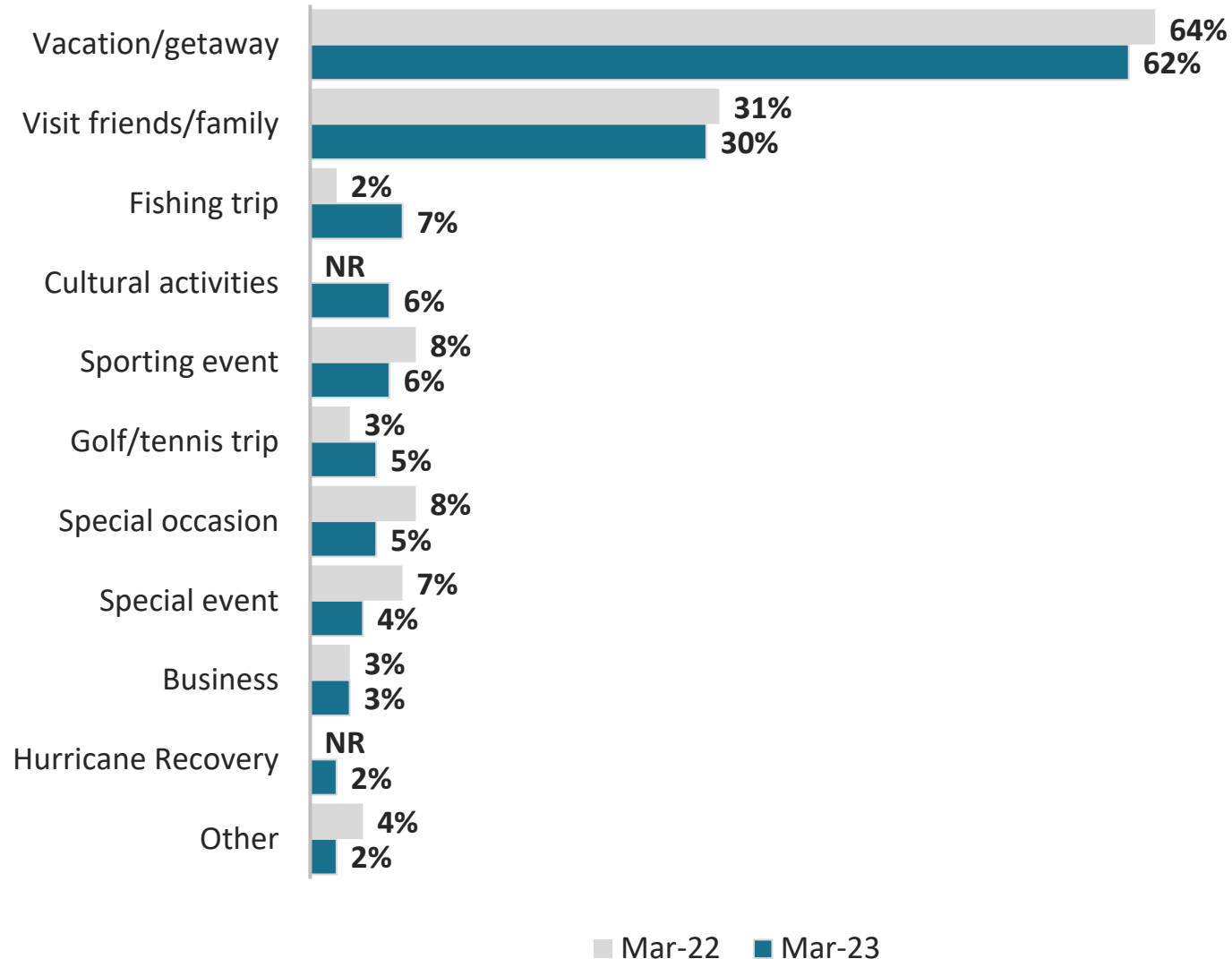
Median Trip Planning Time



TRIP PLANNING SOURCES

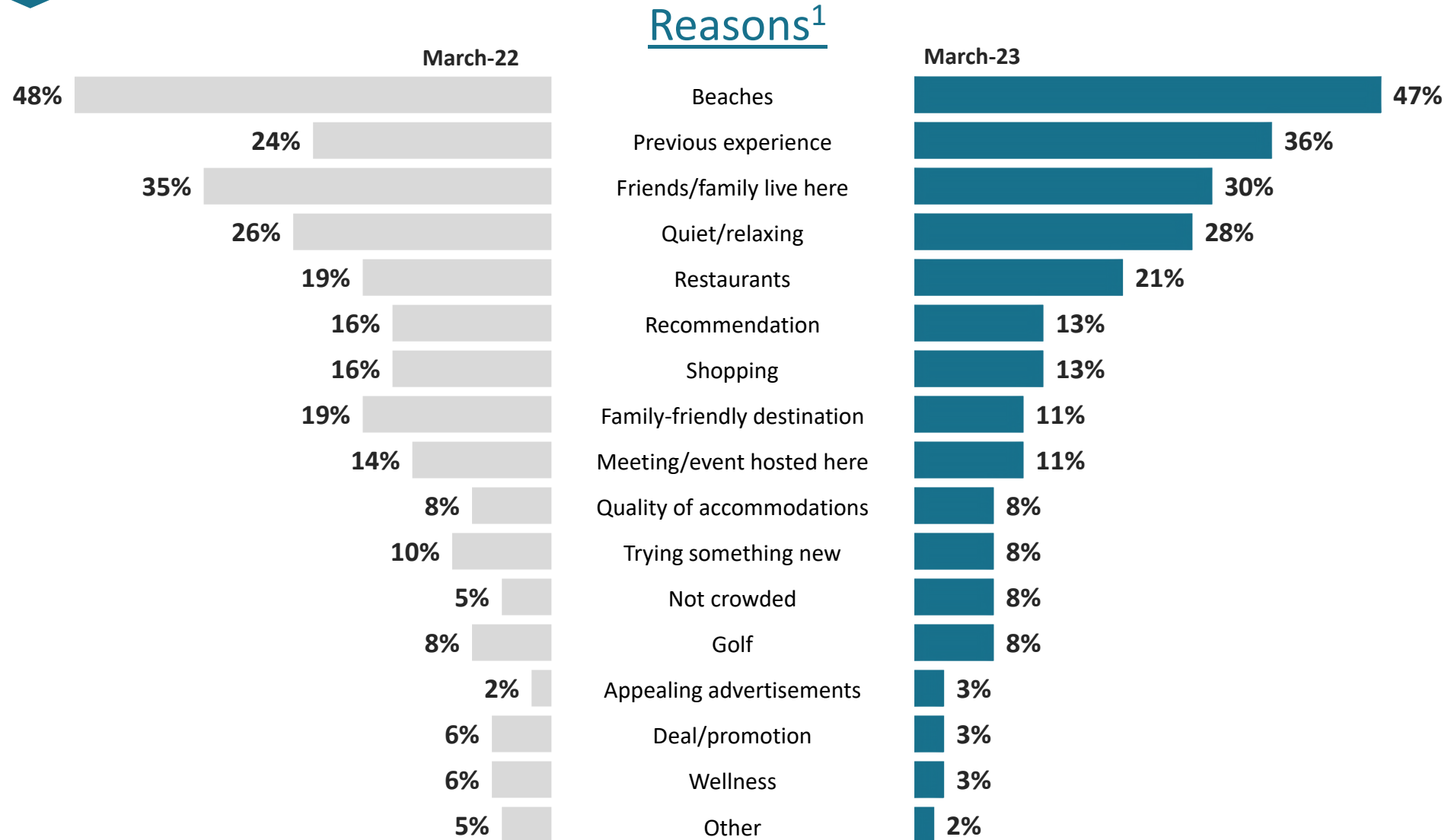


REASONS FOR VISITING¹



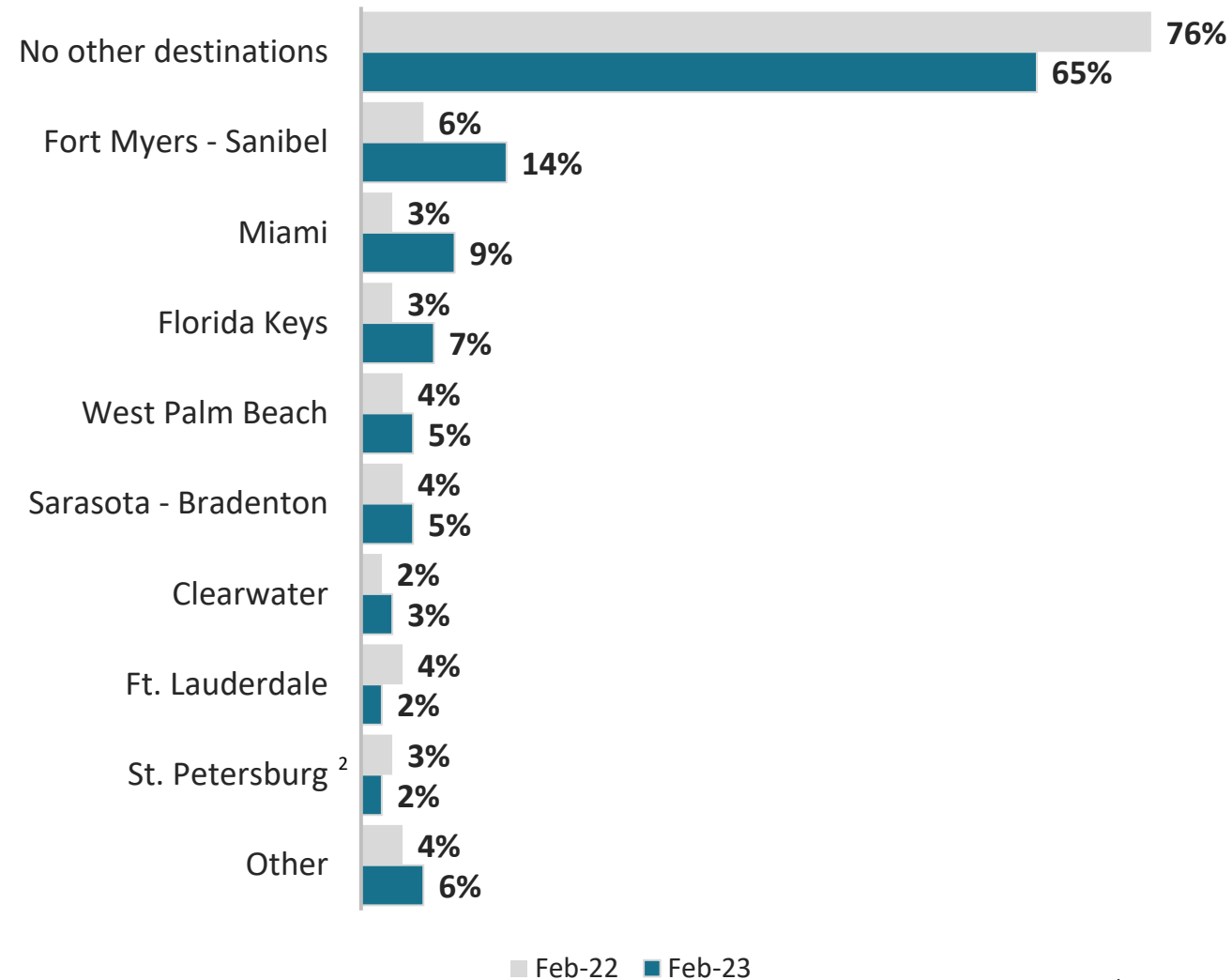
¹ Multiple responses permitted.

REASONS FOR CHOOSING AREA



¹Multiple responses permitted.

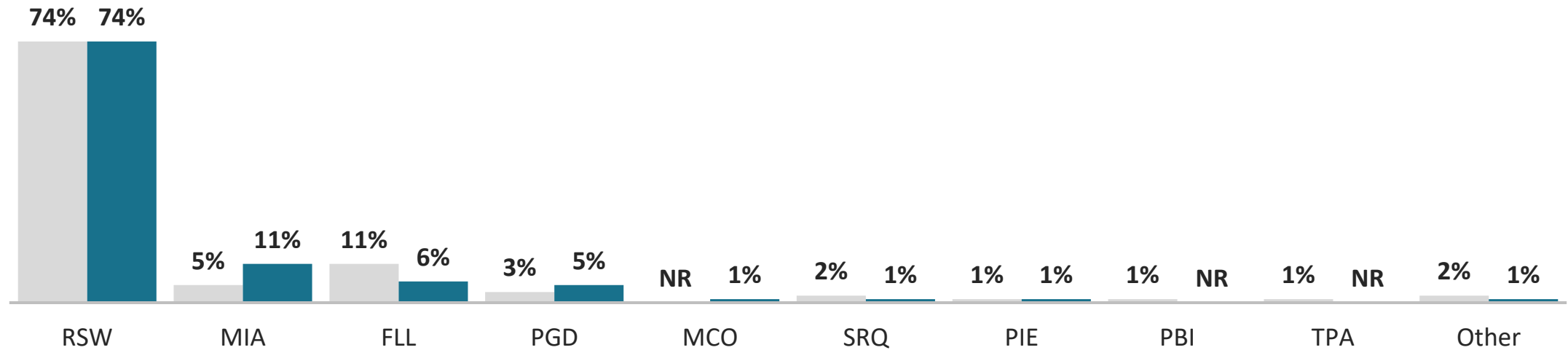
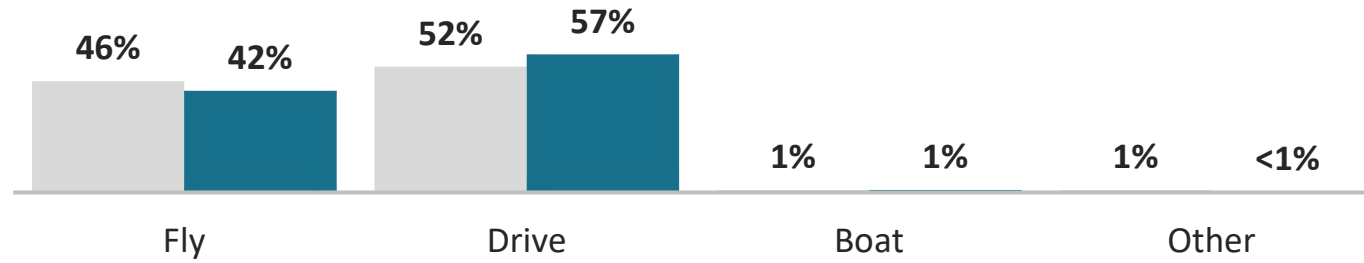
OTHER DESTINATIONS CONSIDERED¹



¹ Multiple responses permitted.

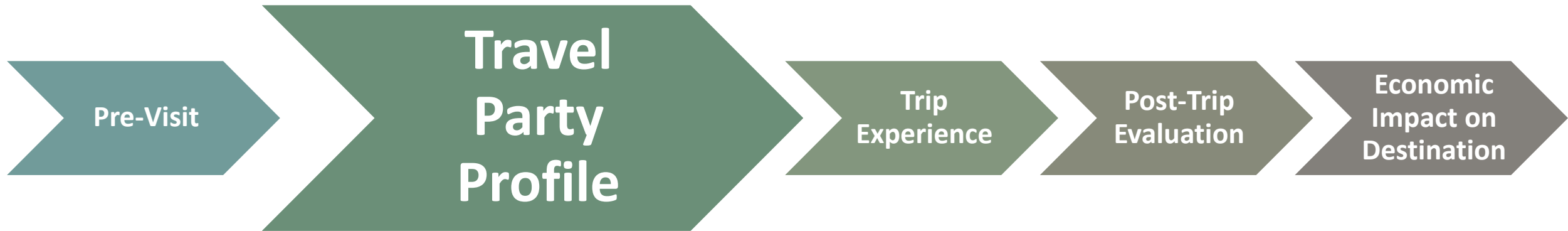
² Other responses included Cuba, Davenport, Deerfield Beach, Galveston, Gulf Shores, Orlando, and St. Augustine.

TRANSPORTATION METHODS

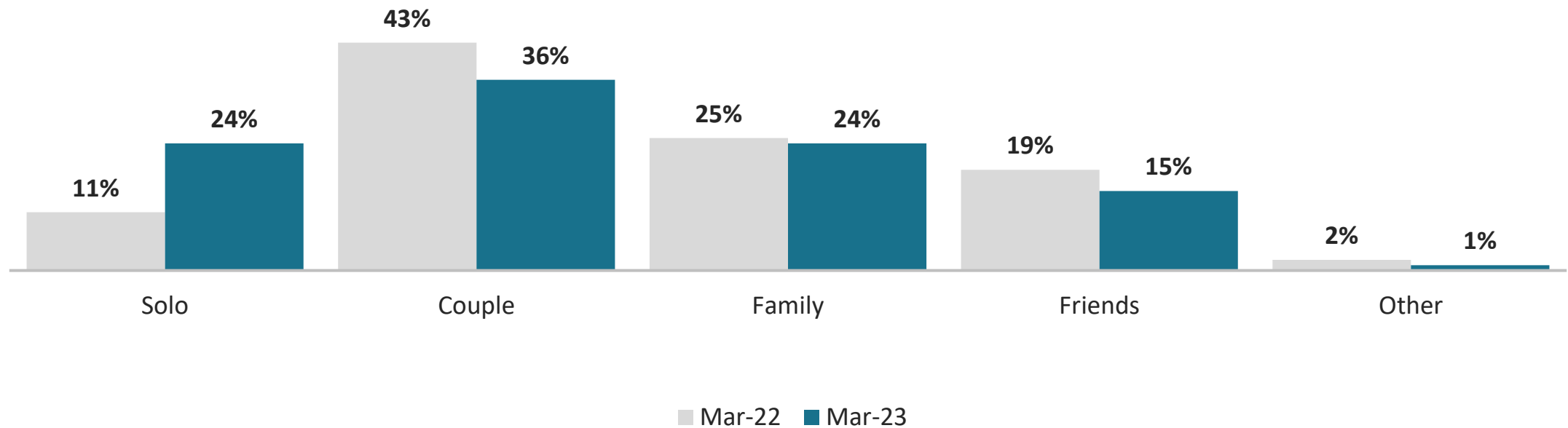


■ Mar-22 ■ Mar-23

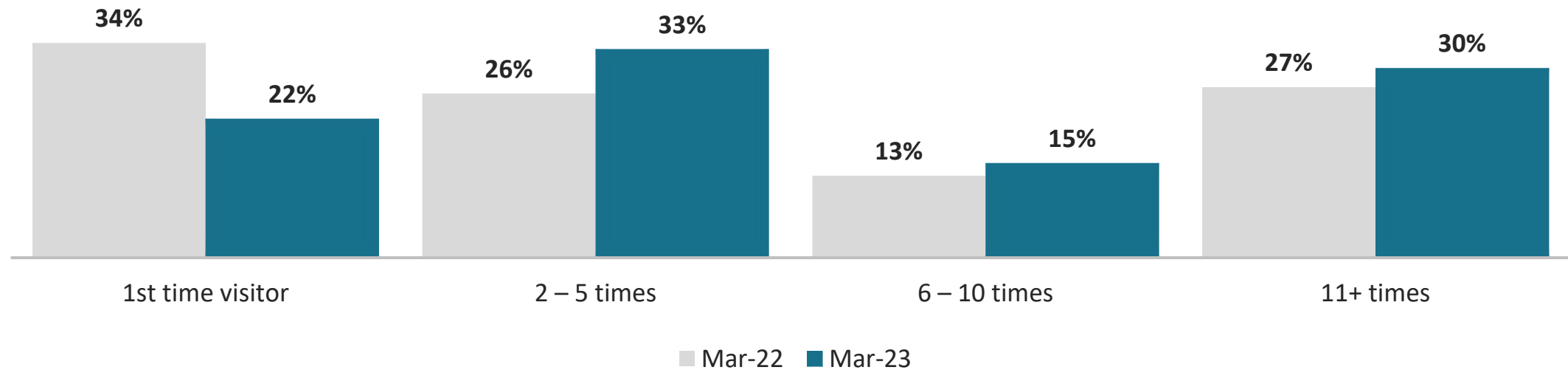
VISITOR JOURNEY: TRAVEL PARTY PROFILE



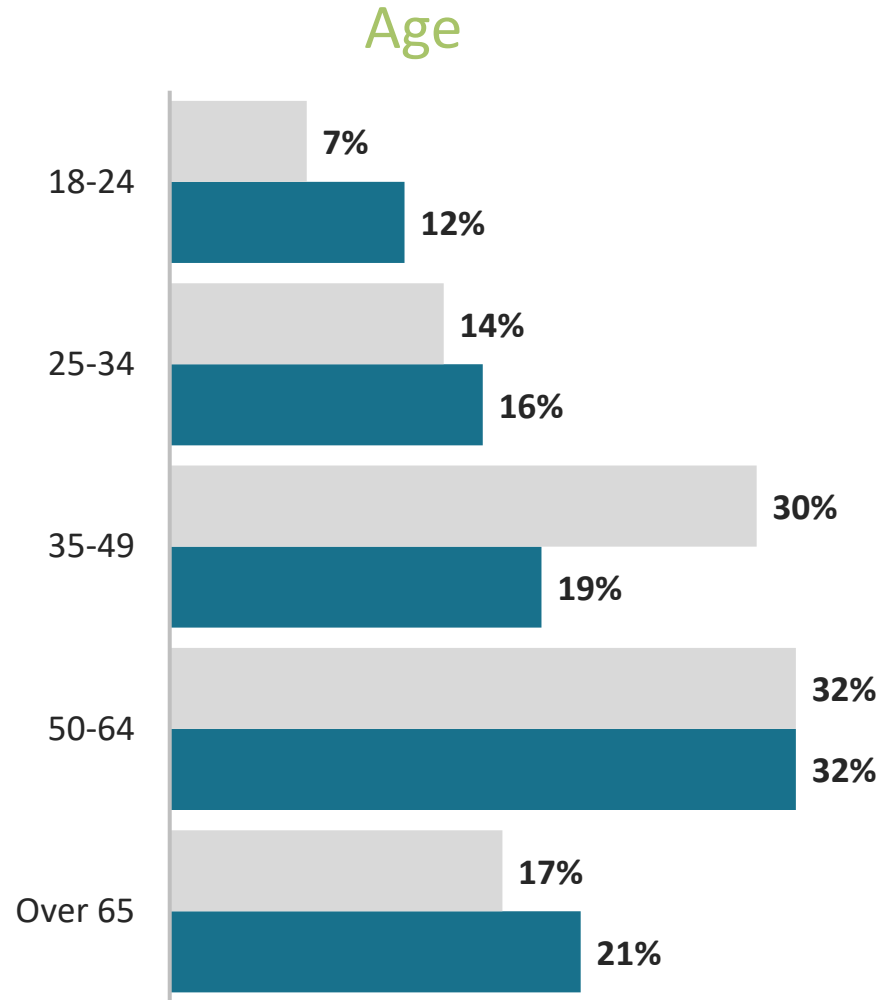
TRAVEL PARTY COMPOSITION



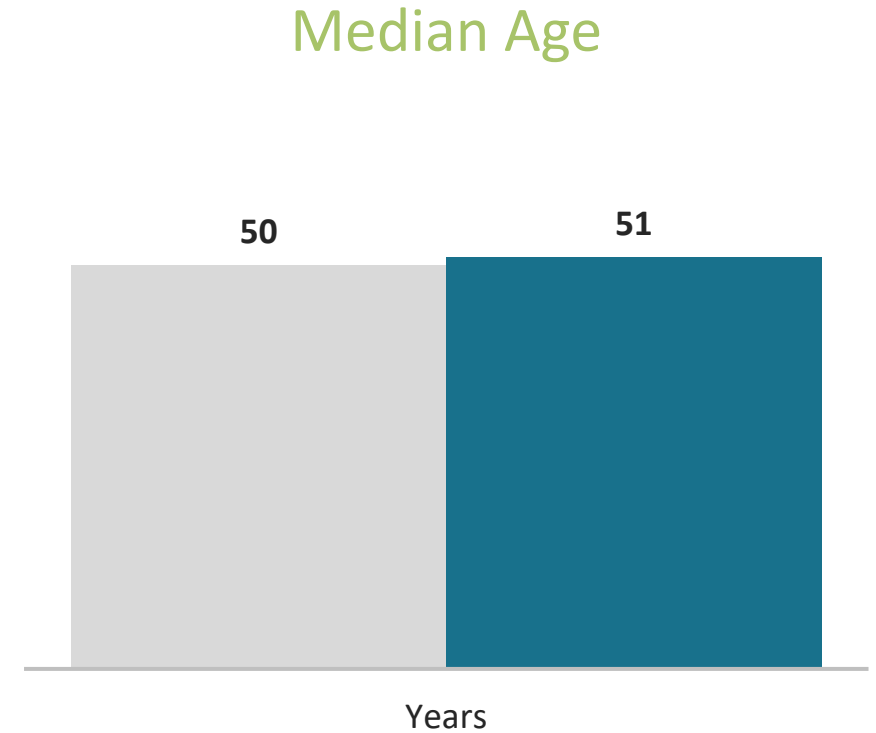
PREVIOUS VISITS



VISITOR AGES

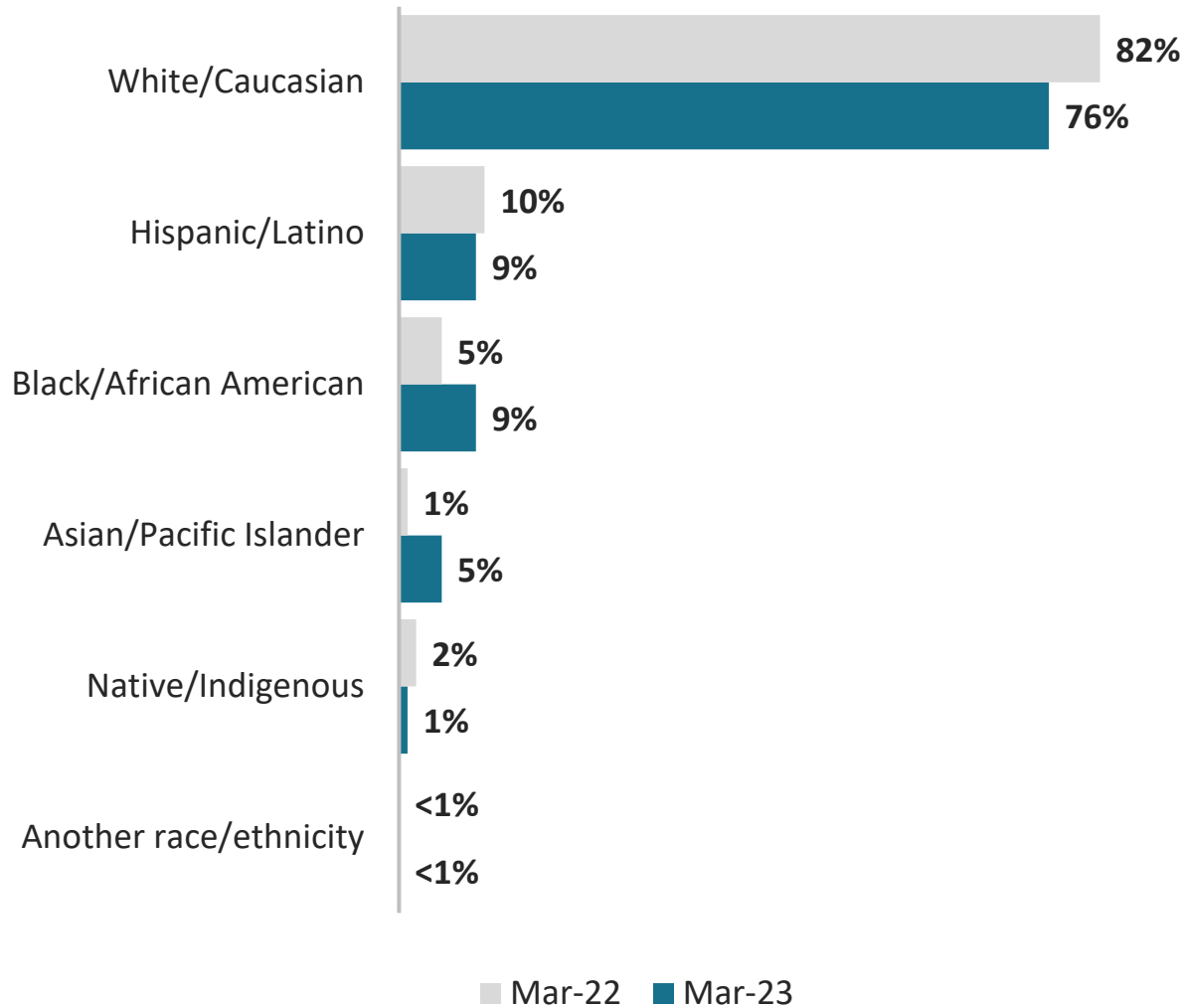


■ Feb-22 ■ Feb-23

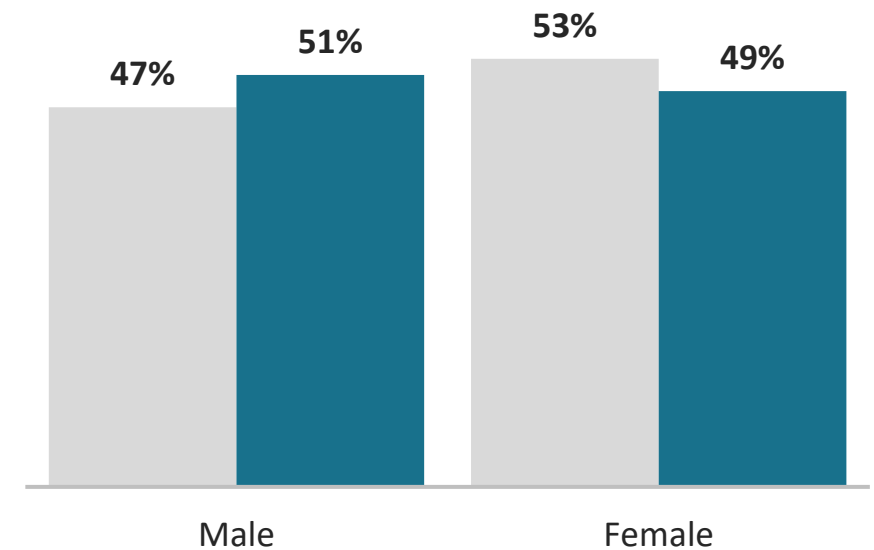


VISITOR RACE & GENDER

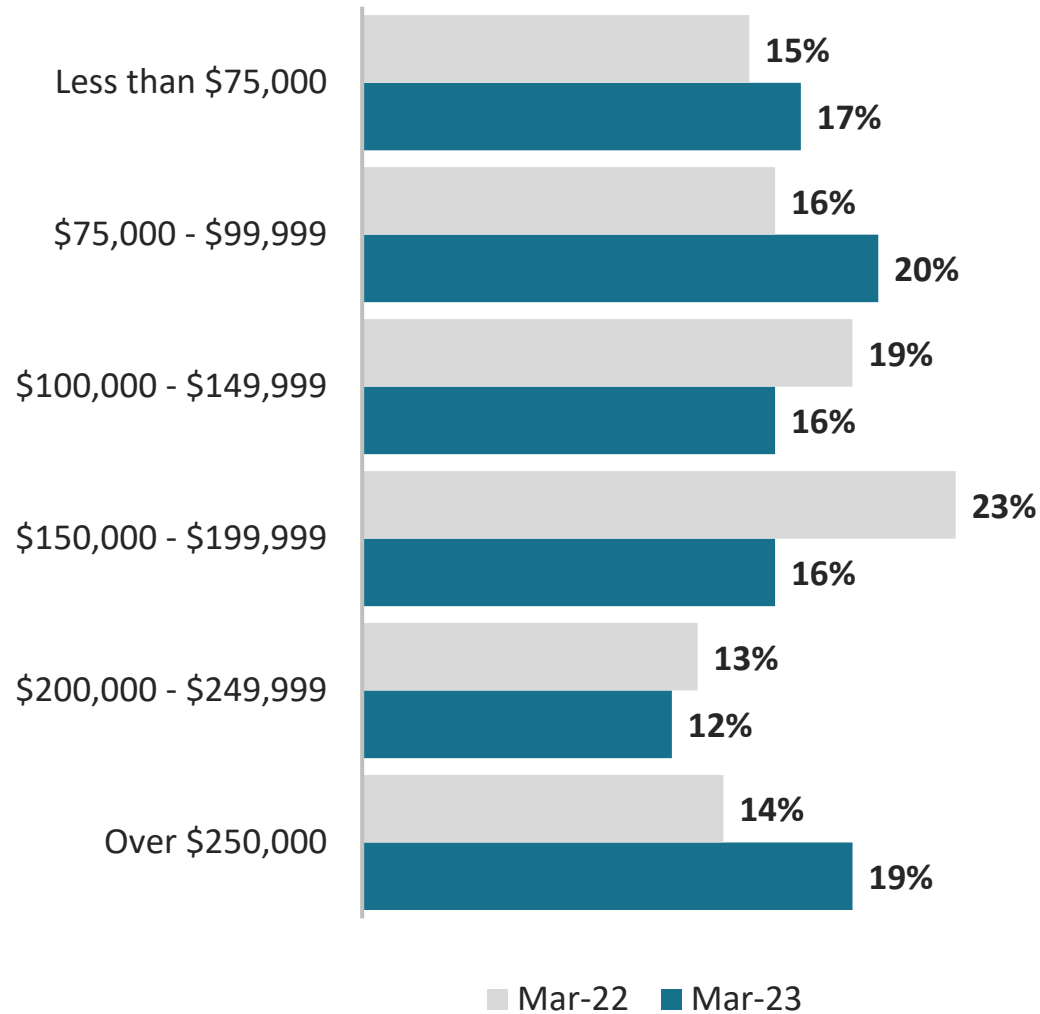
Race



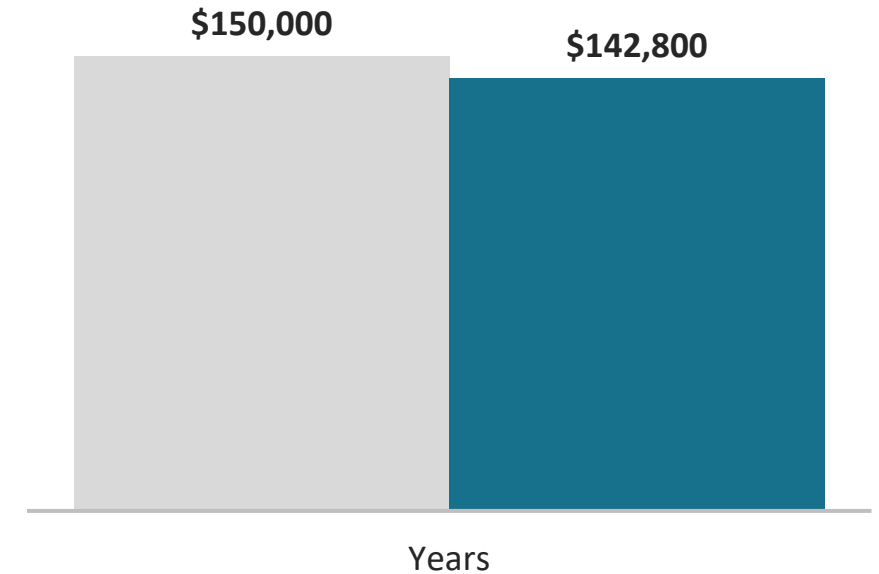
Gender



Income



Median Household Income



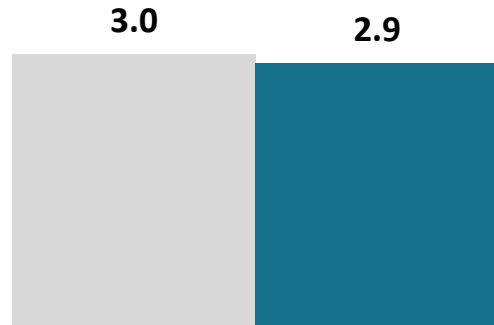
VISITOR JOURNEY: TRIP EXPERIENCE



TRIP CHARACTERISTICS

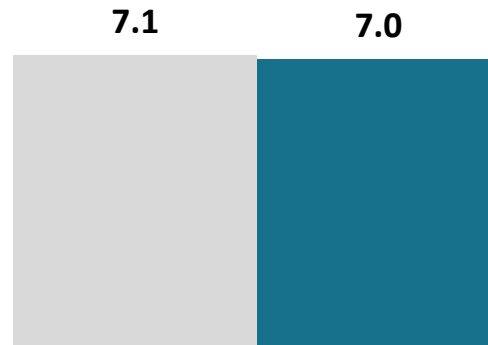
TRAVEL PARTY SIZE

2.9



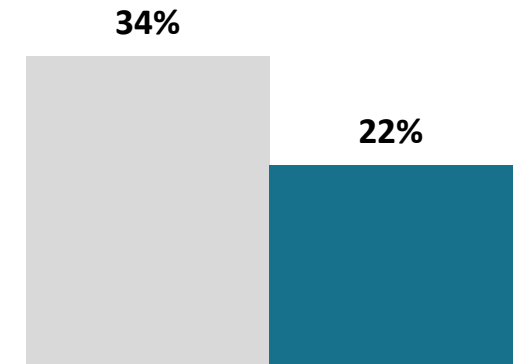
NIGHTS STAYED

7.0



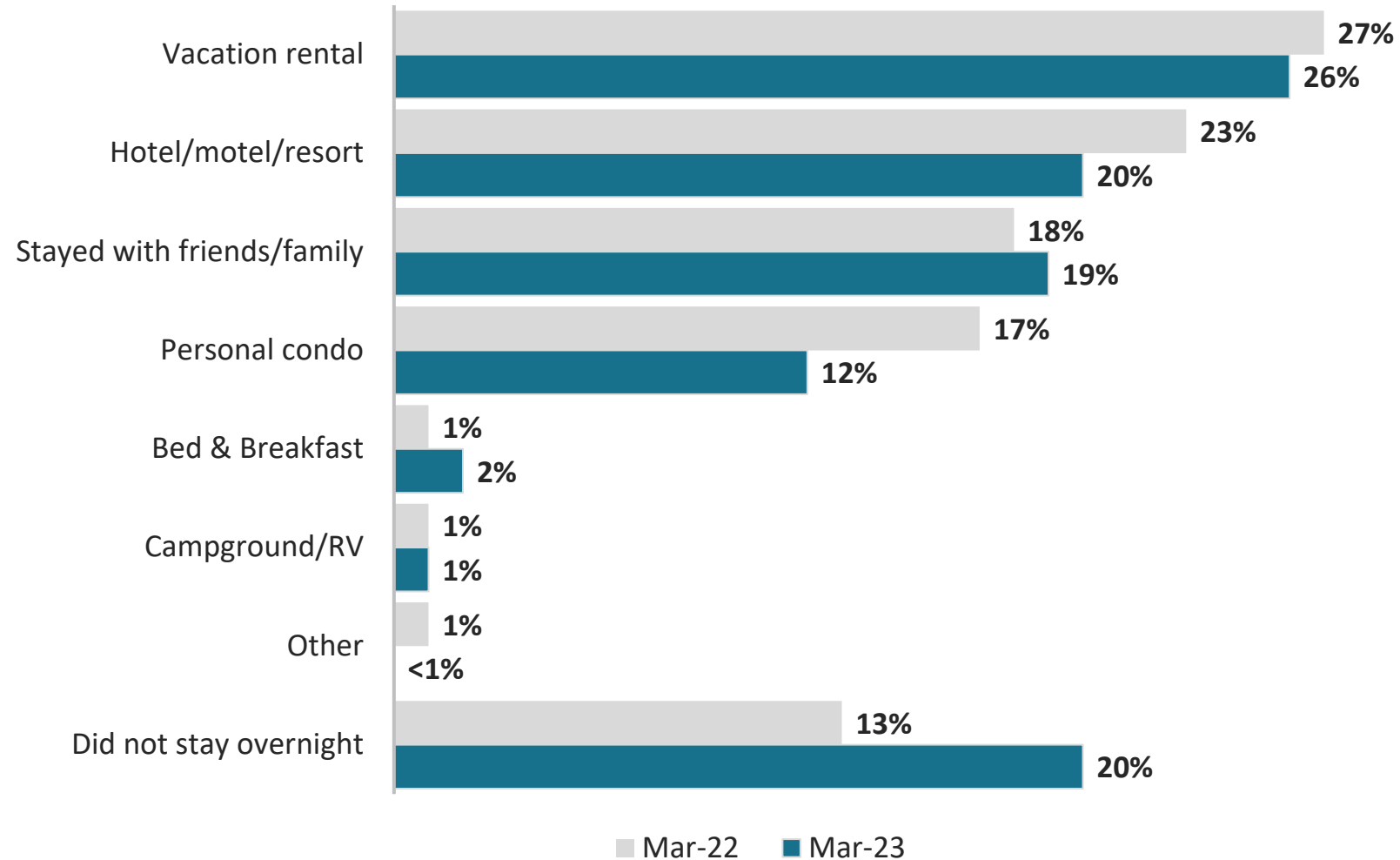
1ST TIME VISITORS

27%

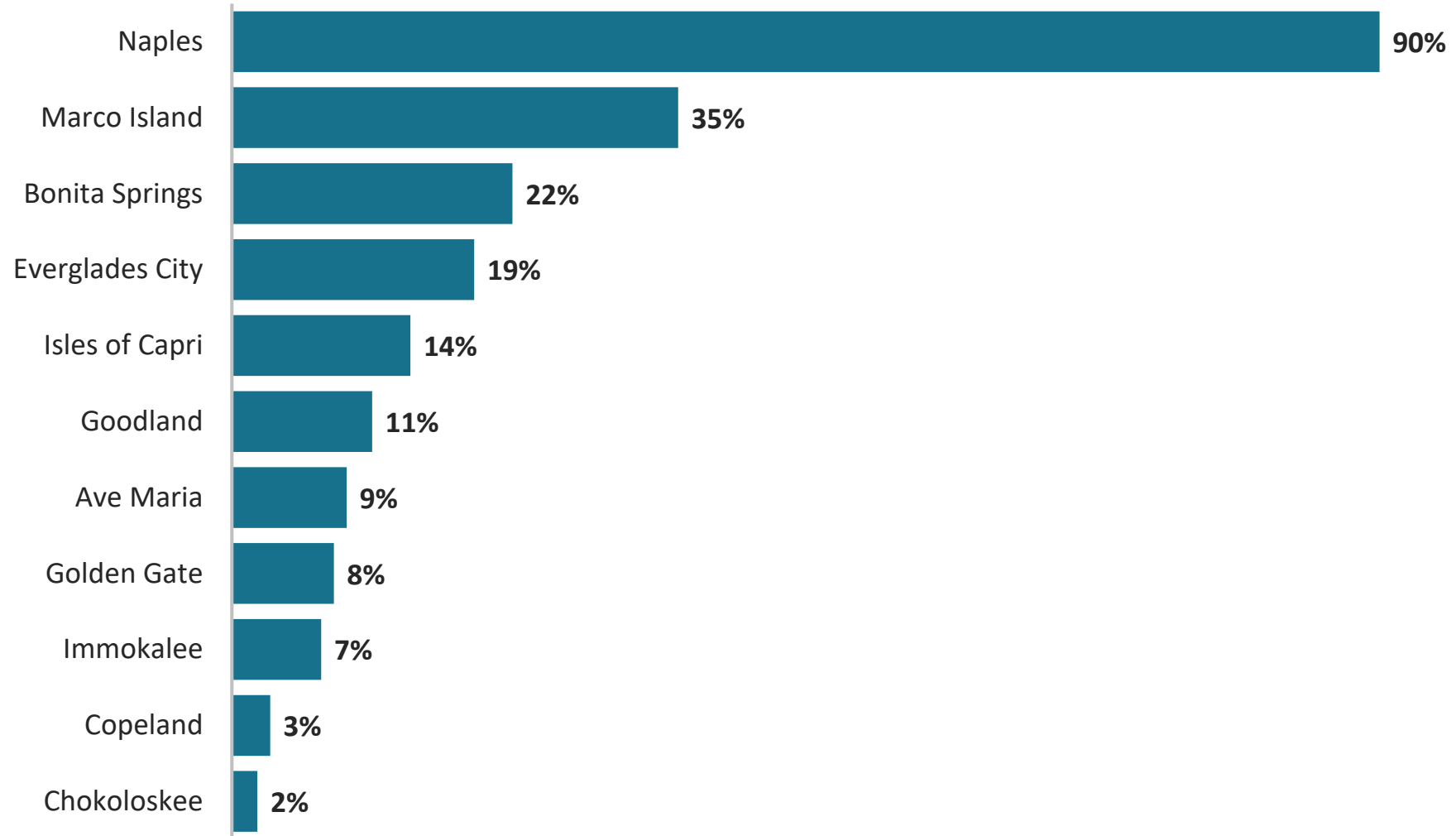


■ Mar-22 ■ Mar-23

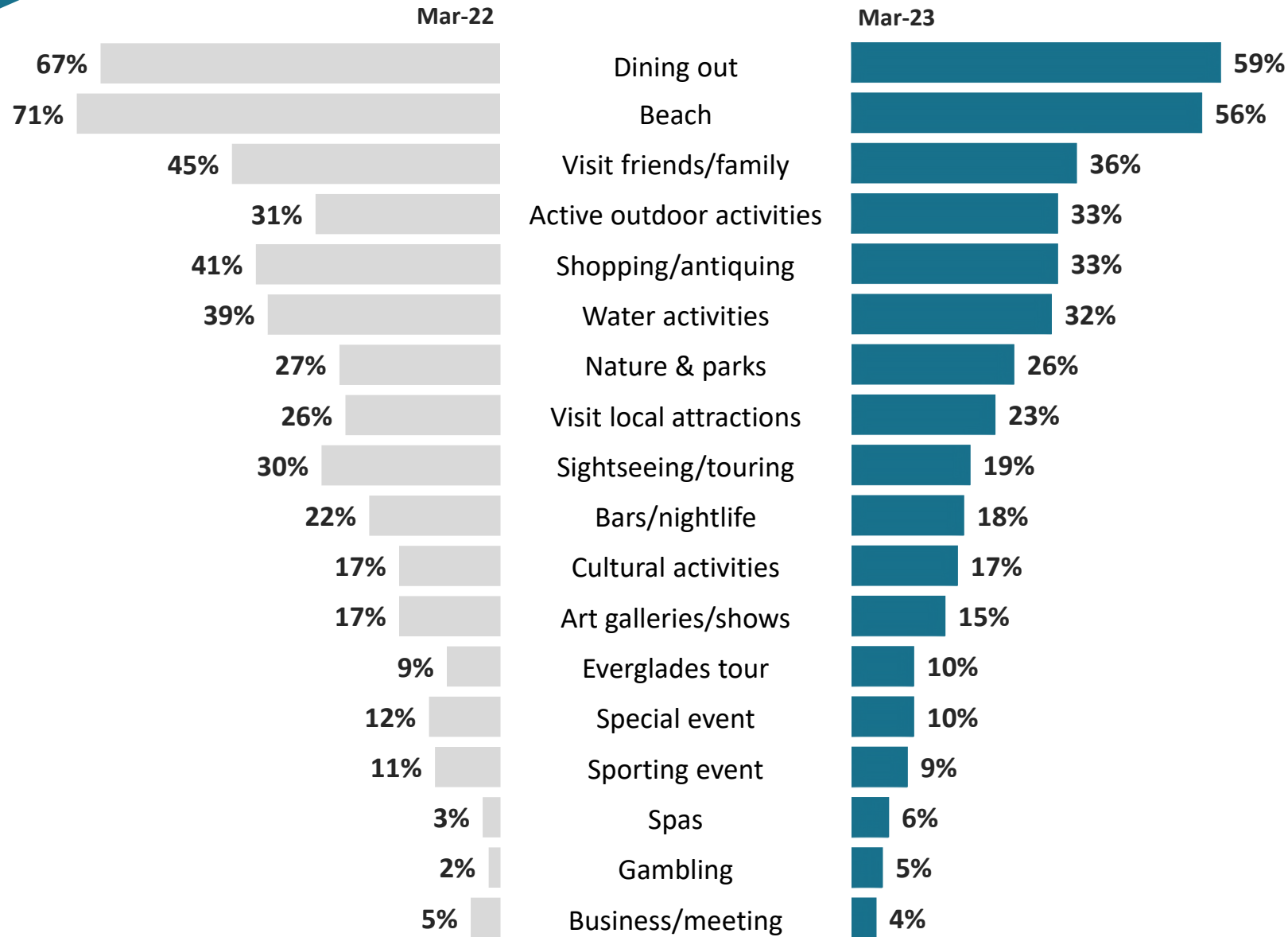
TYPE OF ACCOMMODATIONS



AREAS VISITED



TRIP ACTIVITIES

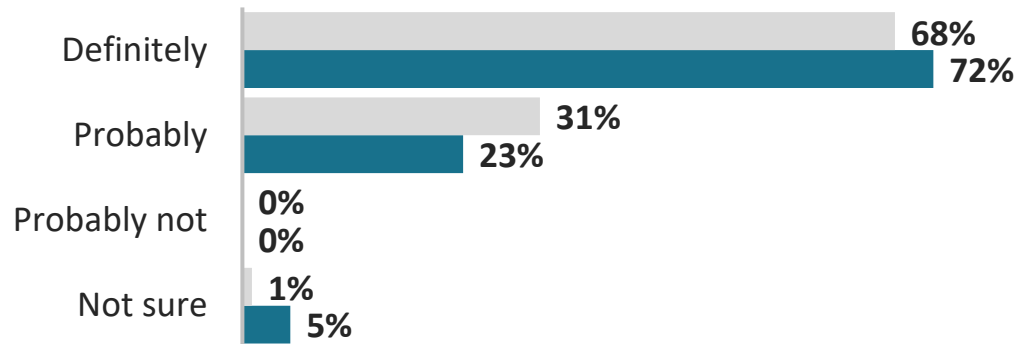


¹ Multiple responses permitted.

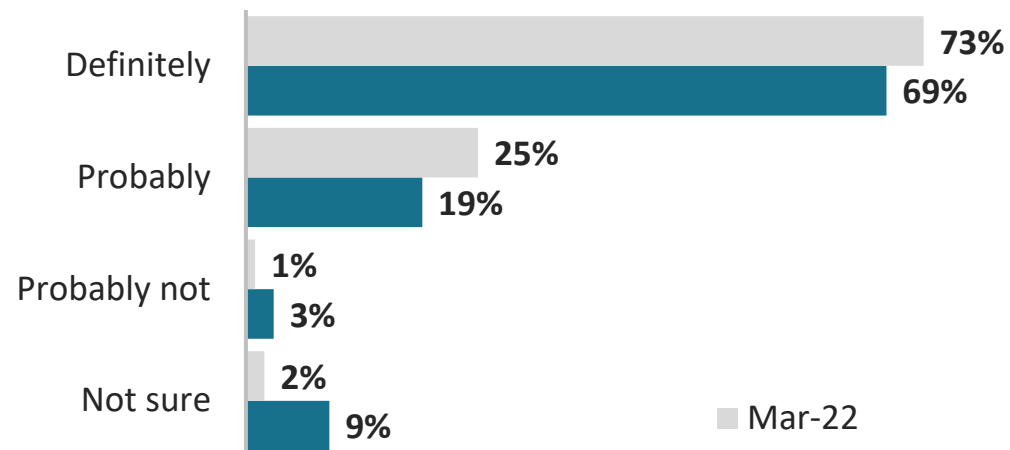
VISITOR JOURNEY: POST-TRIP EVALUATION



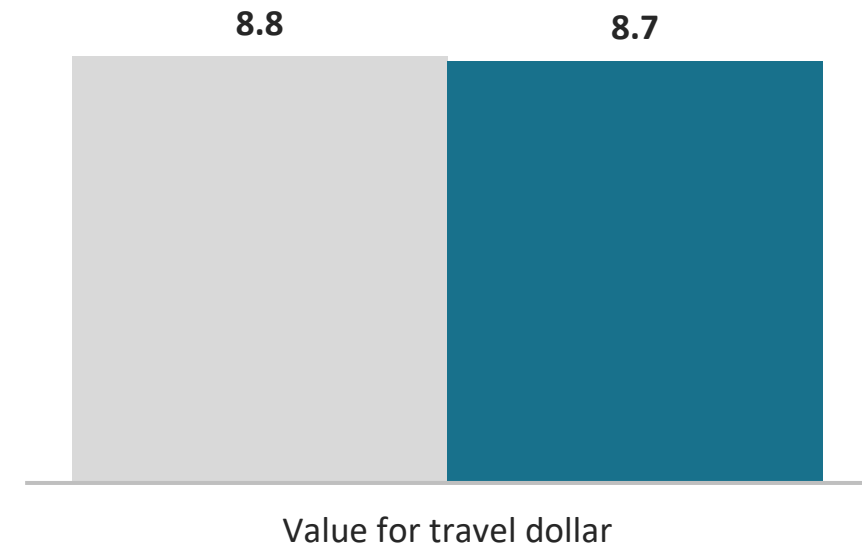
Will recommend the Naples area?



Will return to the Naples area?

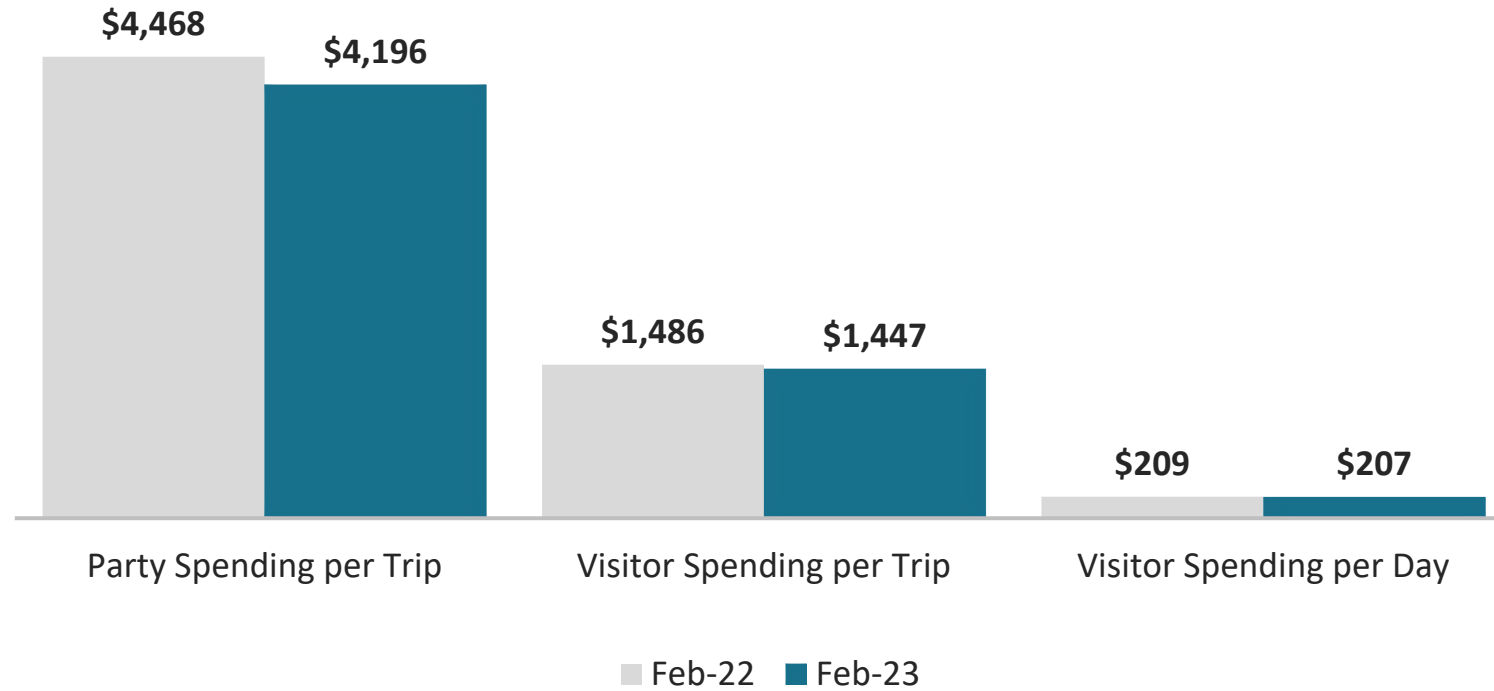


VALUE FOR TRAVEL DOLLAR*



* 10-point scale where 10 is "excellent" and 1 is "poor". High cost was the primary reason for visitors providing lower ratings.

VISITOR SPENDING

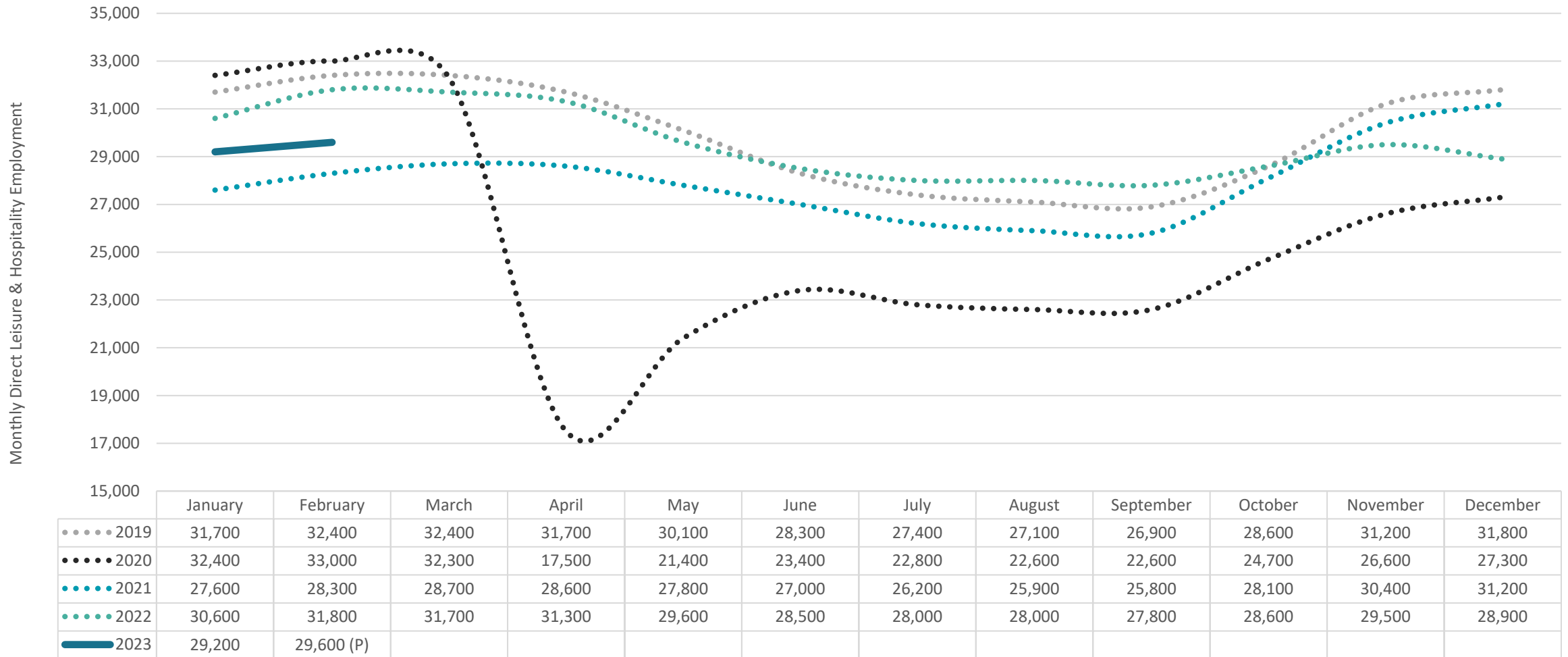


INDUSTRY DATA



LEISURE & HOSPITALTY EMPLOYMENT

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

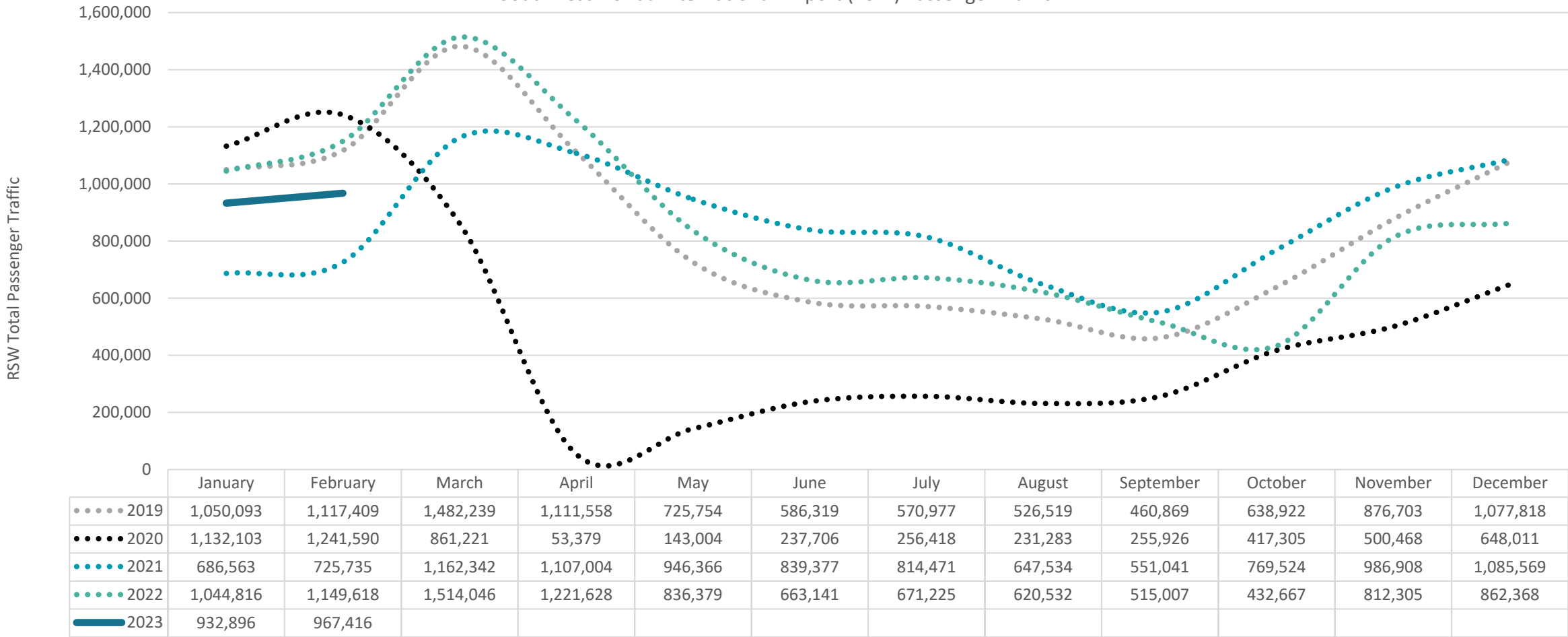


¹ SOURCE: Current Employment Statistic Program (CES), Collier County Leisure and Hospitality Sector, not seasonally adjusted.

(P) Preliminary.

RSW PASSENGER TRAFFIC

Southwest Florida International Airport (RSW) Passenger Traffic¹



¹ SOURCE: Lee County Port Authority Monthly Statistics.

LICENSED TRANSIENT RENTAL UNITS

March 2023 Licensed Transient Rental Units ¹				
	Hotel	Motel	Vacation Rental	Total
Naples	4,452	1,402	2,373	8,227
Marco Island	1,275	115	1,717	3,107
Immokalee	0	70	104	174
Golden Gate	0	150	0	150
Everglades City	38	36	15	89
Bonita Springs	0	0	56	56
Chokoloskee	0	13	1	14
Goodland	0	5	5	10
Ochopee	0	0	2	2
Ave Maria	0	0	1	1
Total	5,765	1,791	4,274	11,830²

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

²Some units are likely still unavailable due to the impact of Hurricane Ian.

NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau
March 2023 Monthly Dashboard

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