

NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau
May 2022 Monthly Dashboard





Occupancy rates dipped only slightly compared to May 2021, while Collier County's average room rates have remained among the highest in Florida, bolstering spending and economic impact



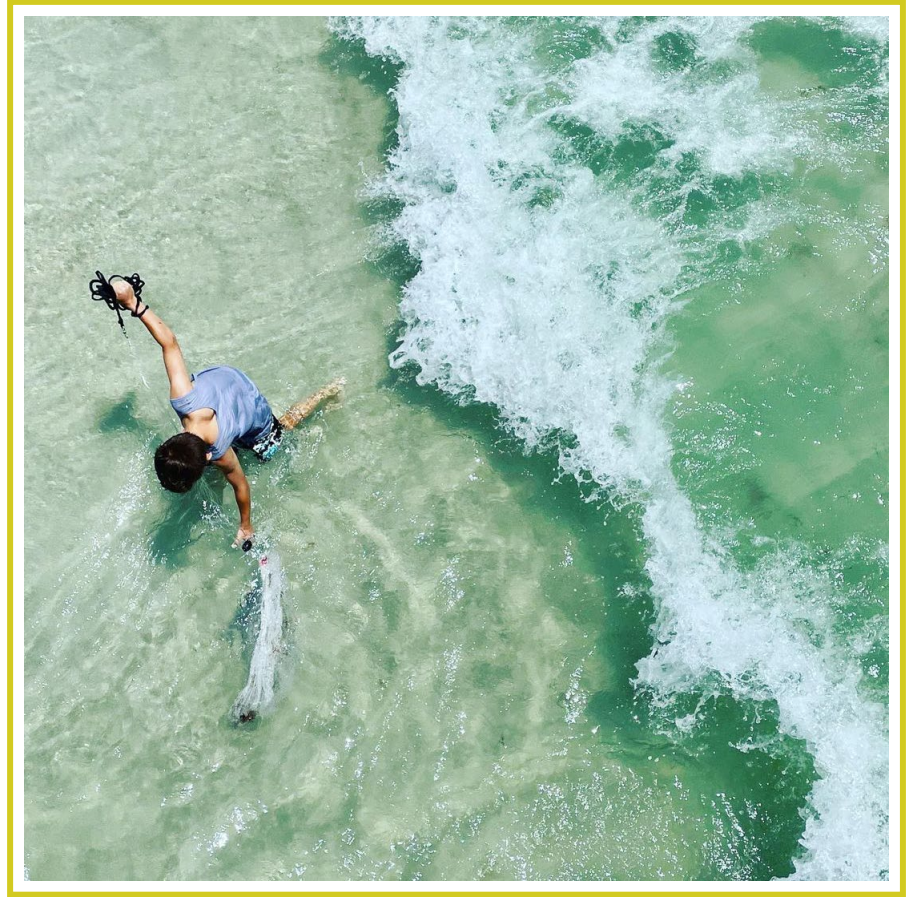
Spending is up nearly 12% over last May due to larger travel parties, longer trip lengths, and more inventory available to visitors



Looking ahead to the next 3 months, reservations are down for nearly 4 out of 5 accommodations providers. The ongoing surge in gas prices, air fare prices, and inflation are likely contributing factors



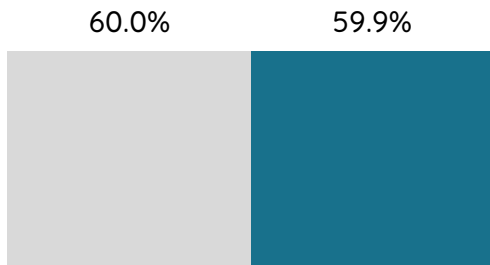
Most visitors perceive the Naples, Marco Island, Everglades area as providing a high-value for their travel dollars. That said, high cost was the primary reason for visitors providing lower ratings



MAY 2022 LODGING METRICS*

OCCUPANCY RATE

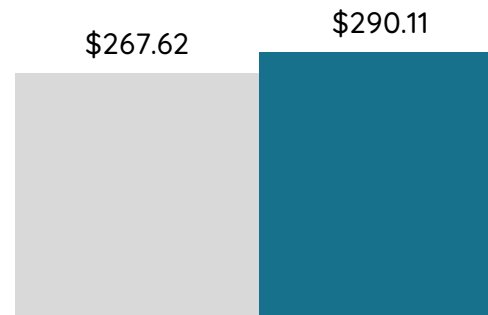
59.9%



- 0.2% from 2021

AVERAGE DAILY RATE

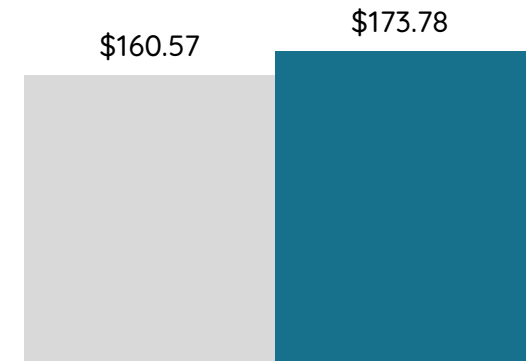
\$290.11



+ 8.4% from 2021

REVENUE PER AVAILABLE ROOM

\$173.78



+ 8.2% from 2021

■ May-21 ■ May-22

* Visitors staying in paid accommodations.

MAY 2022 VISITATION & ROOM NIGHTS*

VISITORS

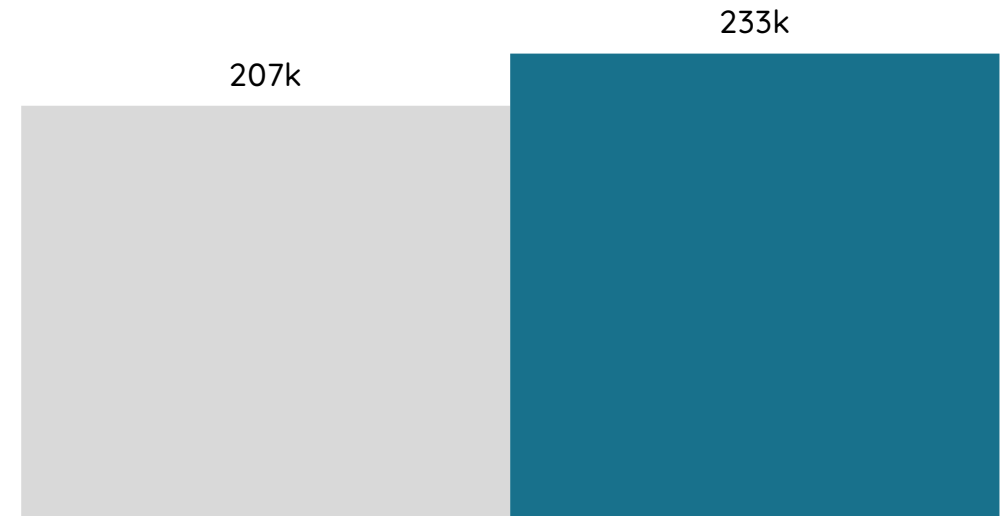
150,100



+ 8.3% from 2021

ROOM NIGHTS

232,900



+ 12.7% from 2021

■ May-21 ■ May-22

* Visitors staying in paid accommodations.

MAY 2022 SPENDING & ECONOMIC IMPACT*

DIRECT SPENDING

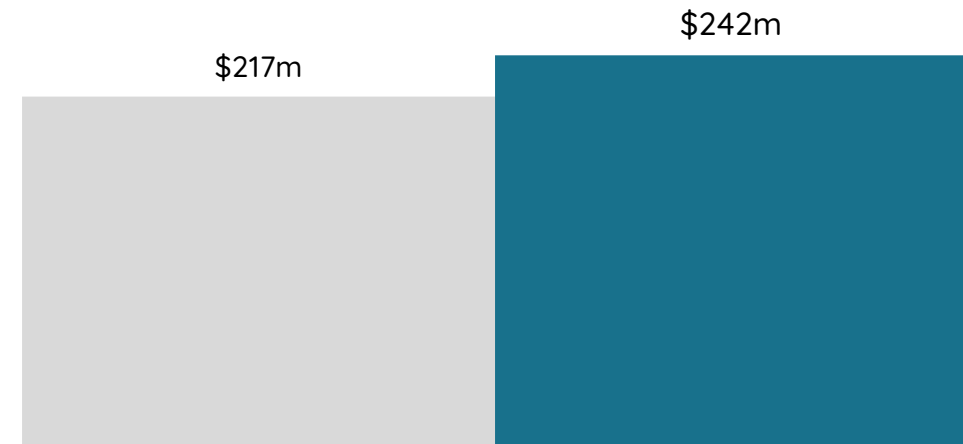
\$162,569,100



+ 11.8% from 2021

ECONOMIC IMPACT

\$242,390,500



+ 11.8% from 2021

■ May-21 ■ May-22

* Visitors staying in paid accommodations.

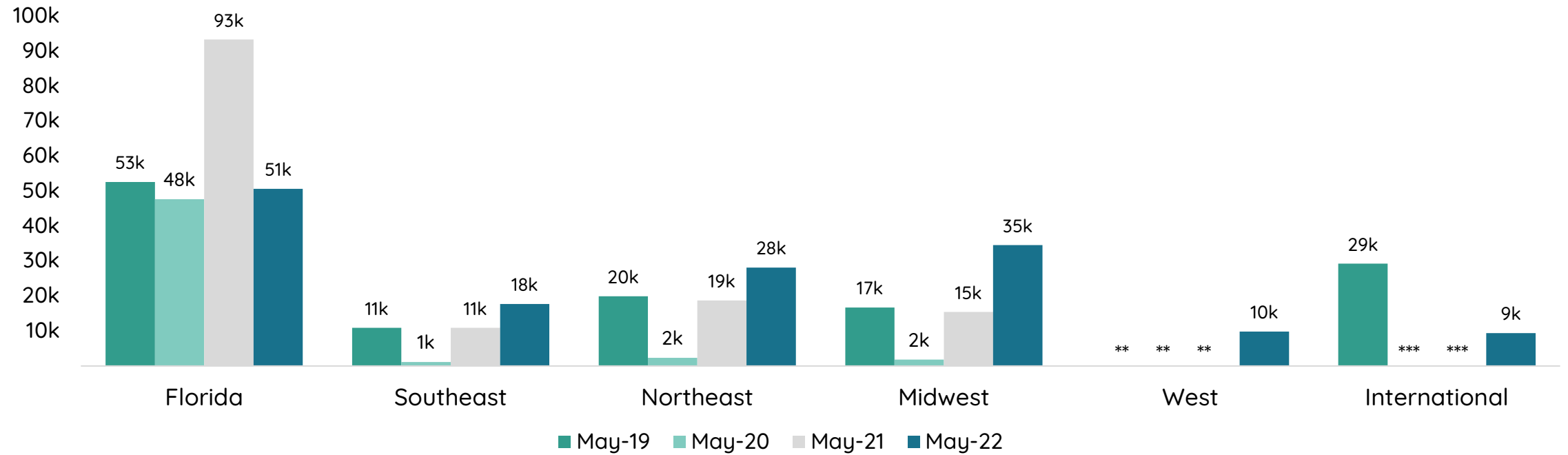
VISITOR ORIGIN*

FLORIDA VISITORS

50,600

OUT-OF-STATE VISITORS

99,500



* Visitors staying in paid accommodations.

** Visitation from western U.S. states not separated from "other" category in May 2021.

*** Visitation from international markets was too small to estimate for most of 2020 and 2021.

CUMULATIVE VISITATION & ROOM NIGHTS*

CYTD VISITORS

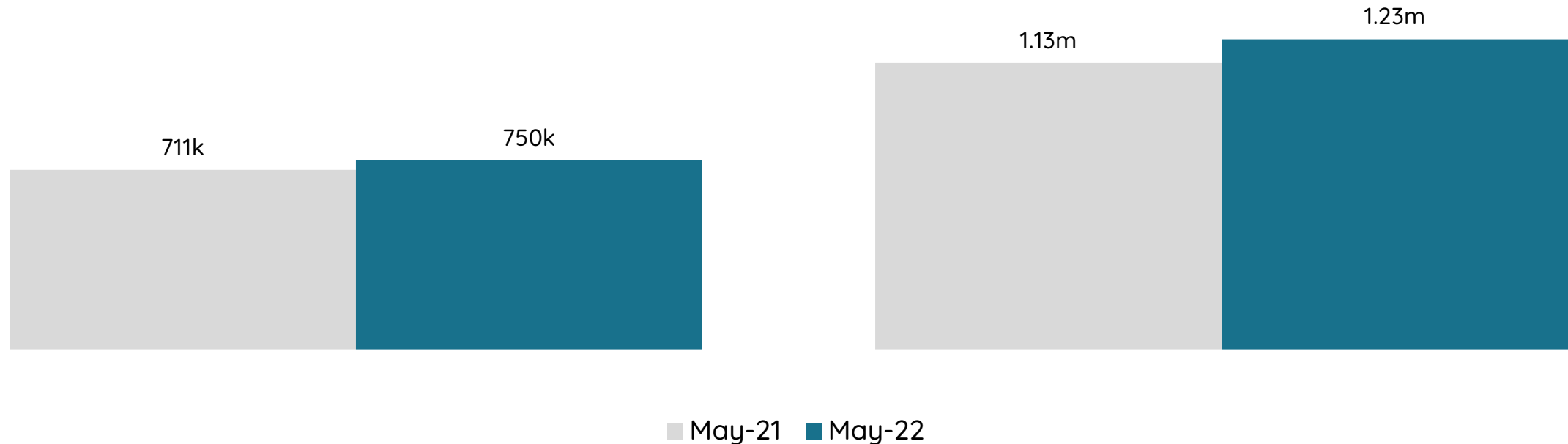
749,800

+ 5.4% from 2021

CYTD ROOM NIGHTS

1,227,900

+ 8.3% from 2021



* Visitors staying in paid accommodations.

CUMULATIVE SPENDING & ECONOMIC IMPACT*

CYTD DIRECT SPENDING

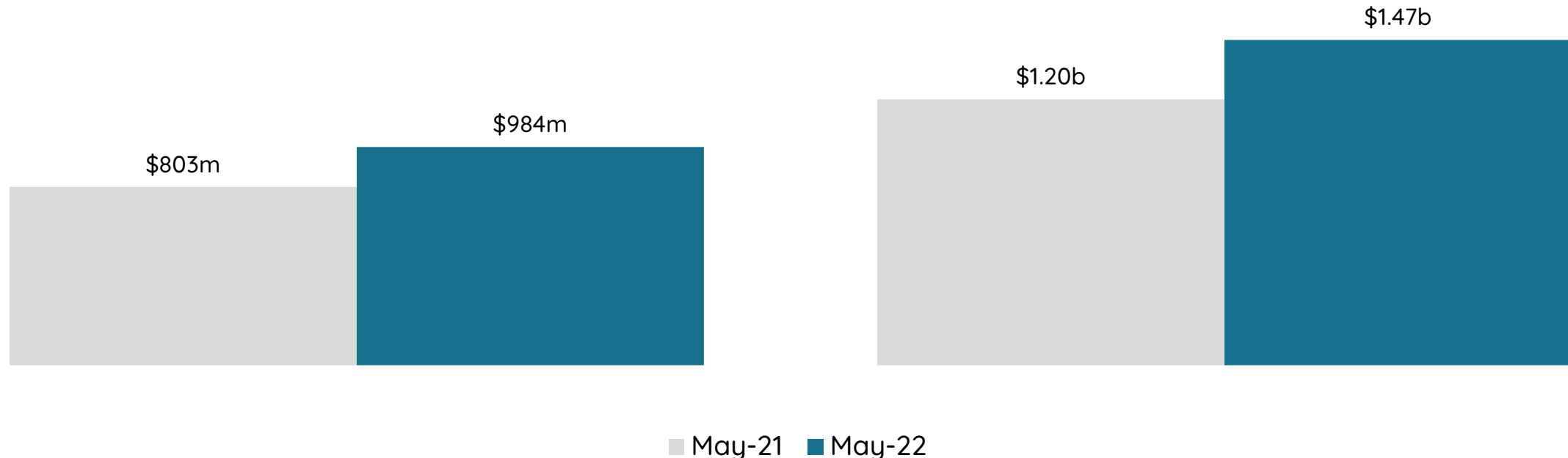
\$983,687,900

+ 22.4% from 2021

CYTD ECONOMIC IMPACT

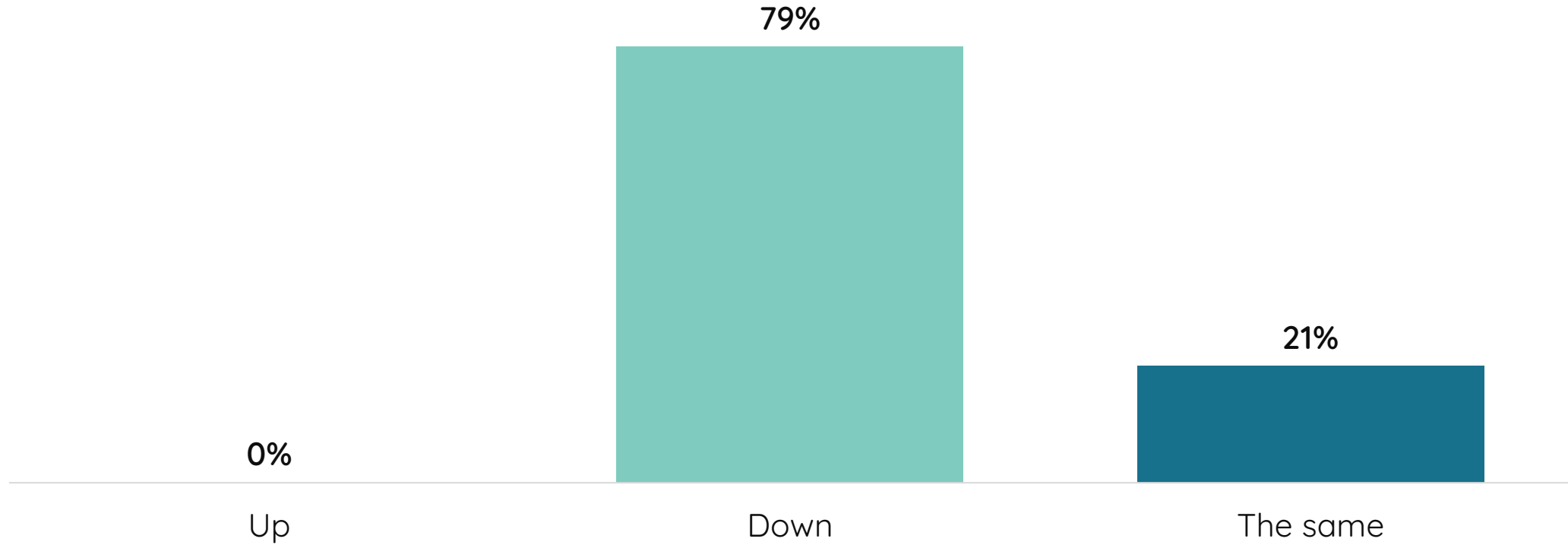
\$1,466,678,700

+ 22.4% from 2021



* Visitors staying in paid accommodations.

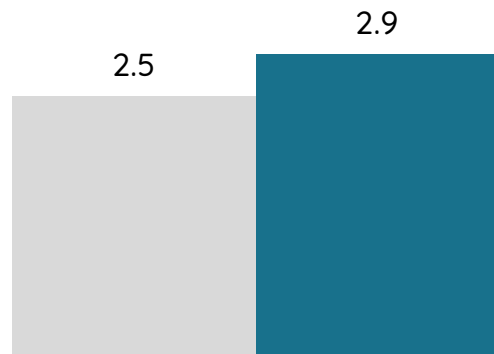
Looking ahead to the next three months, are your property's reservations up, down, or the same compared to this time last year?



TRIP CHARACTERISTICS*

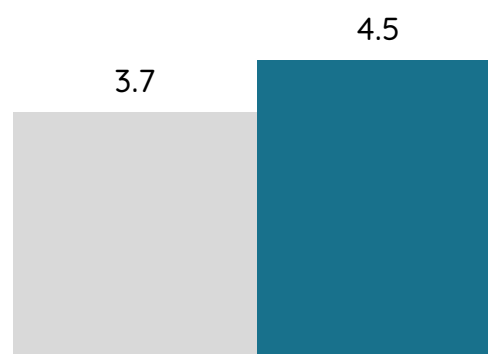
TRAVEL PARTY SIZE

2.9



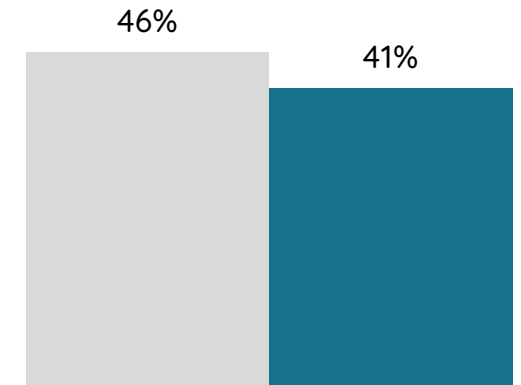
NIGHTS STAYED

4.5



1ST TIME VISITORS

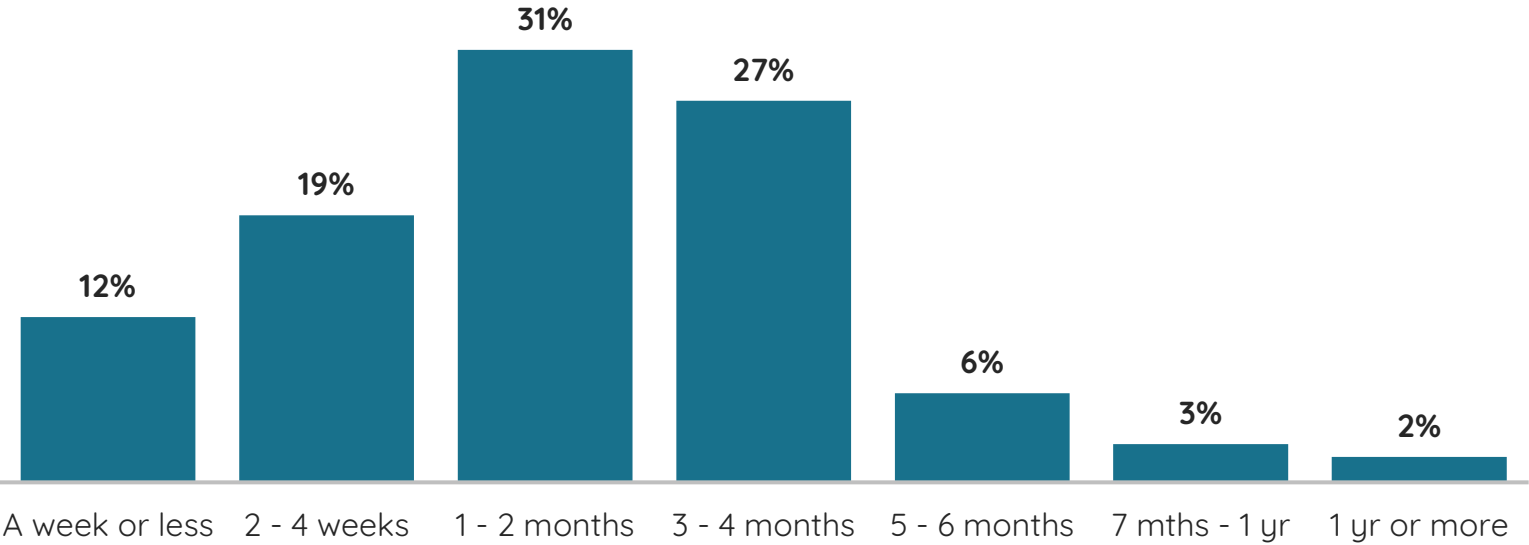
41%



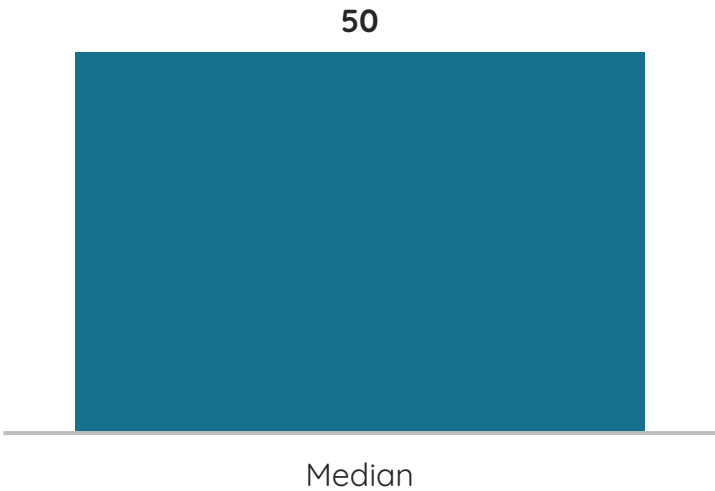
■ May-21 ■ May-22

* Visitors staying in paid accommodations.

PLANNING WINDOWS

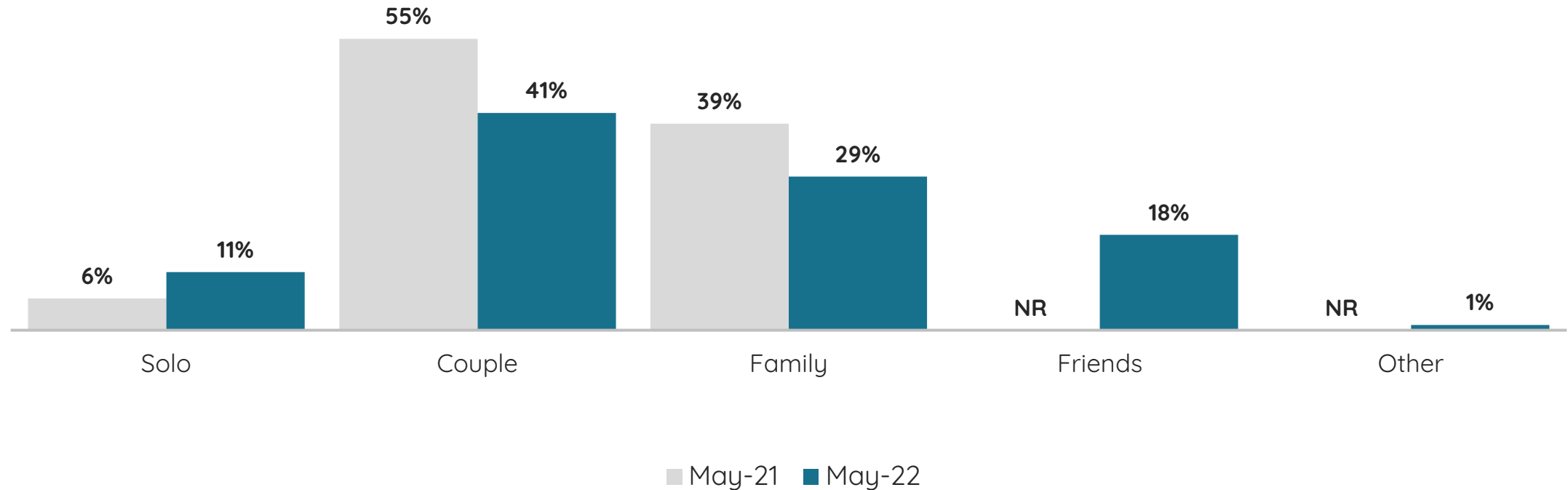


MEDIAN PLANNING DAYS



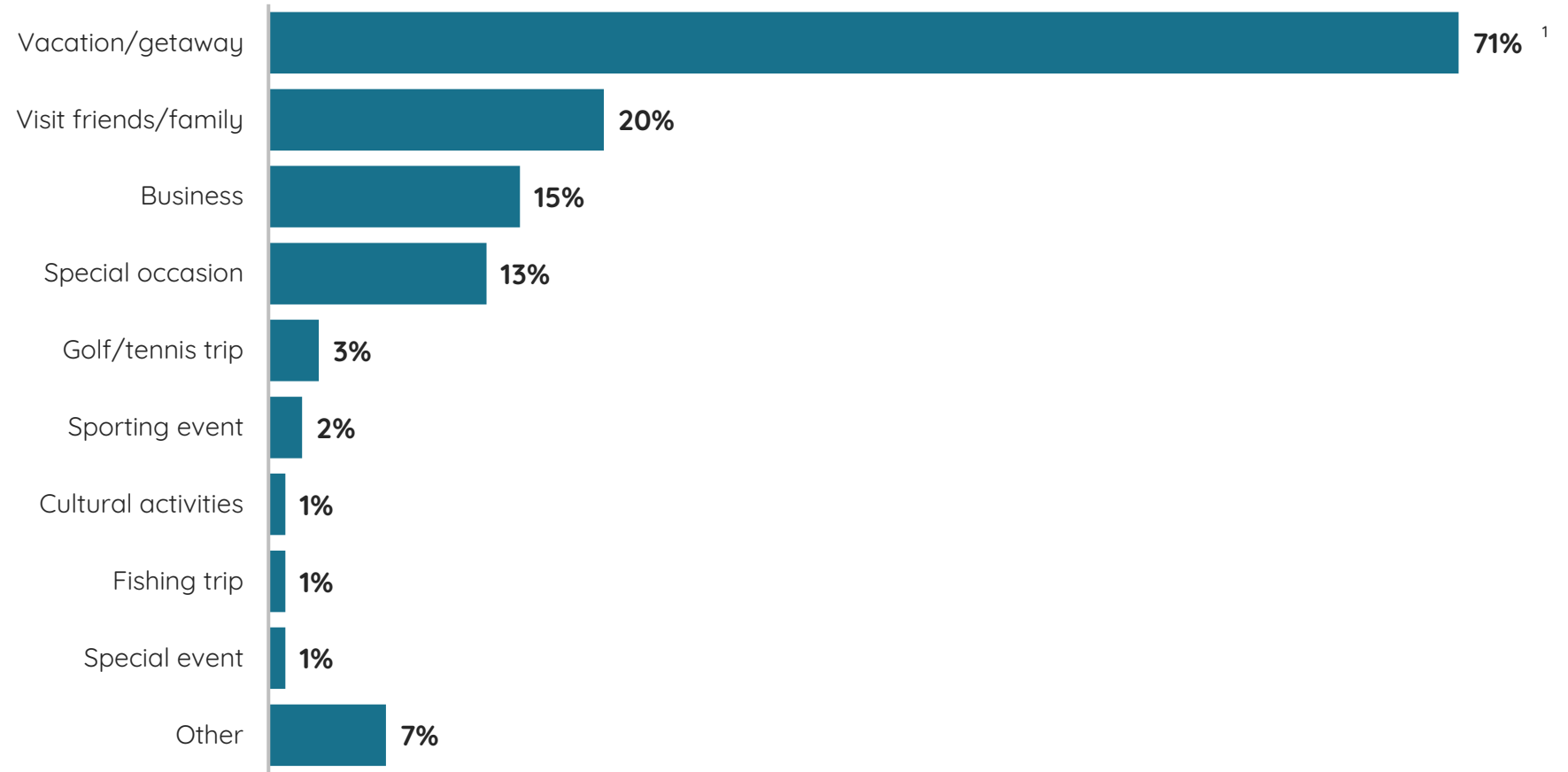
* Visitors staying in paid accommodations.

TRAVEL PARTY COMPOSITION



* Visitors staying in paid accommodations.

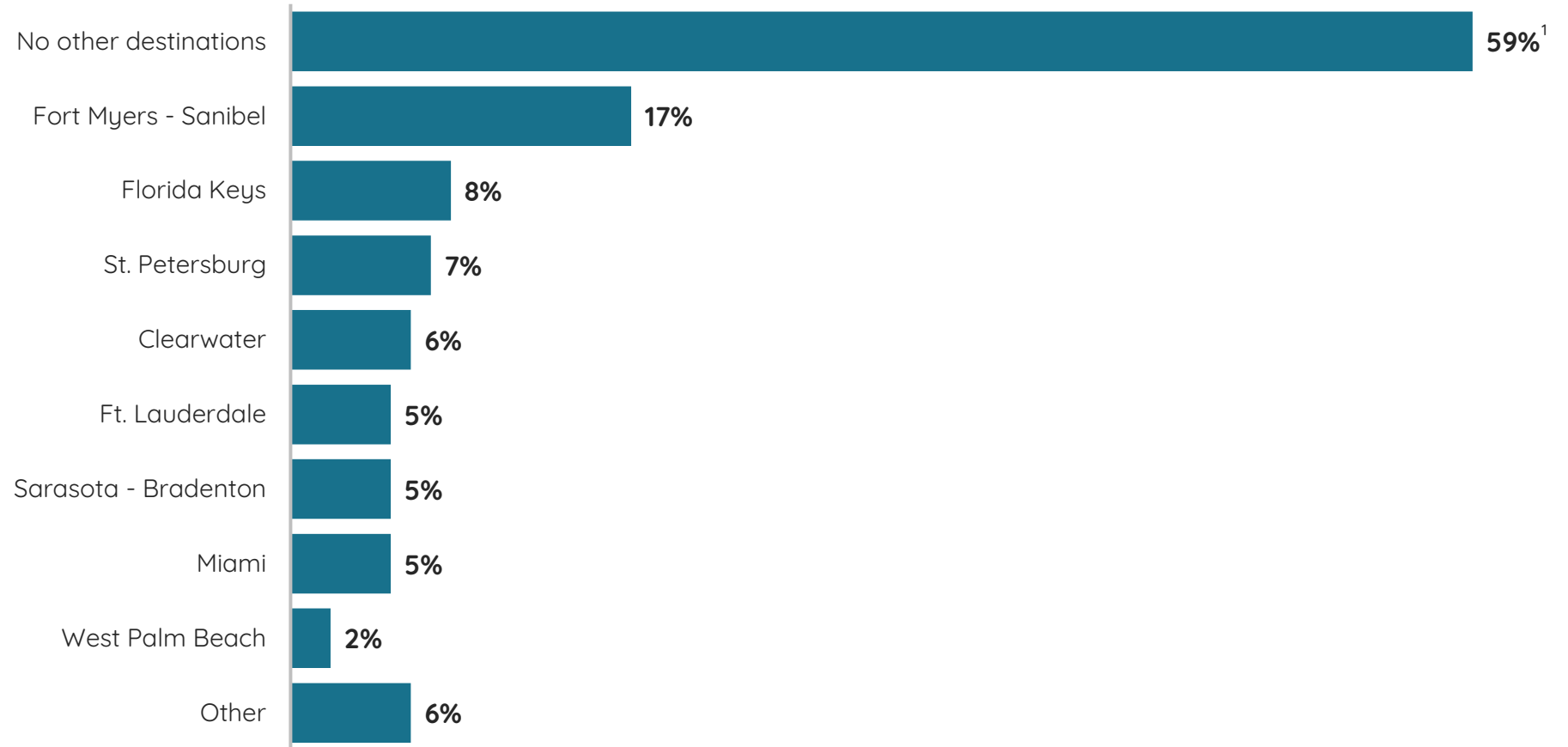
REASONS FOR VISITING



¹ Multiple responses permitted.

* Visitors staying in paid accommodations.

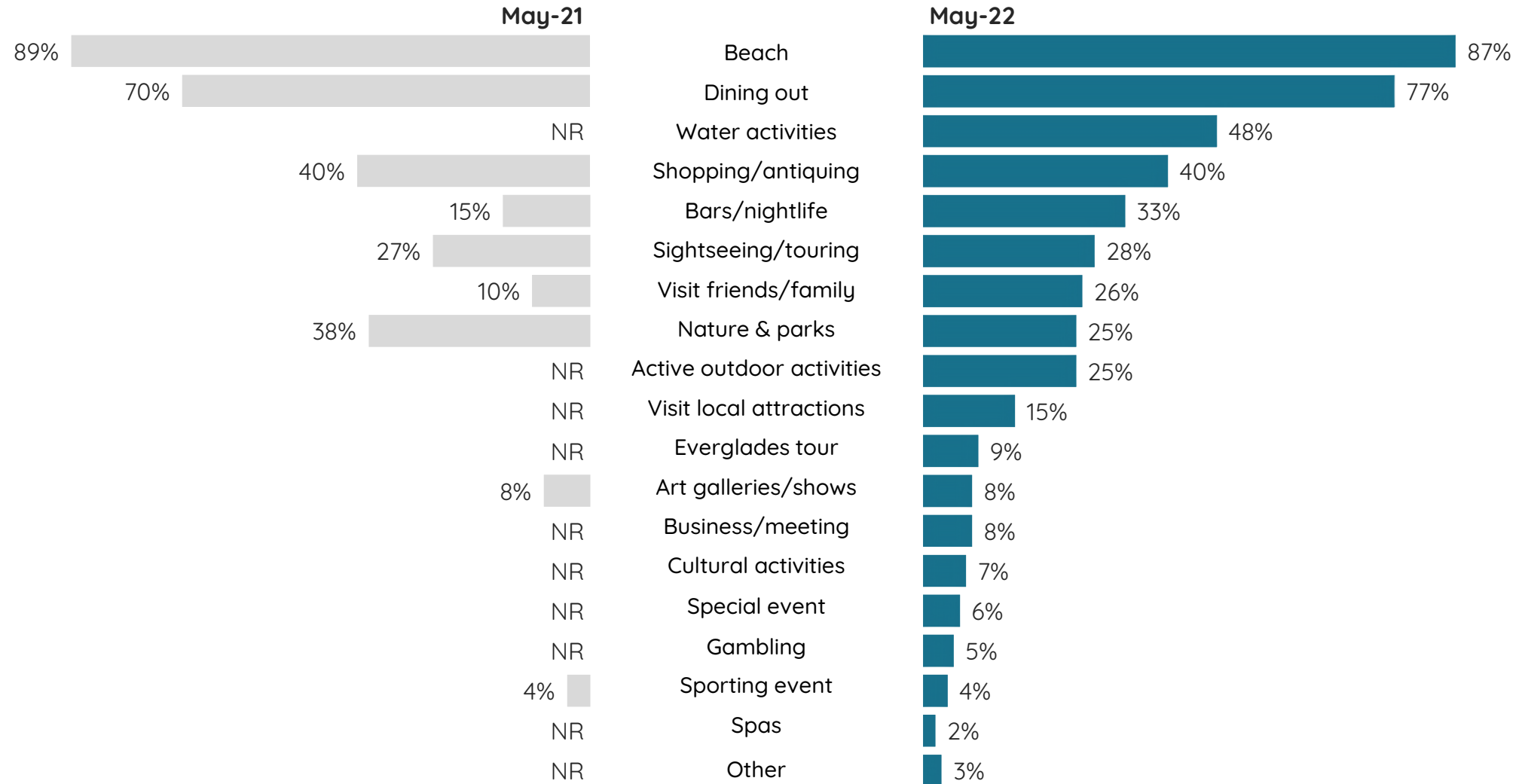
OTHER DESTINATIONS CONSIDERED



¹ Multiple responses permitted.

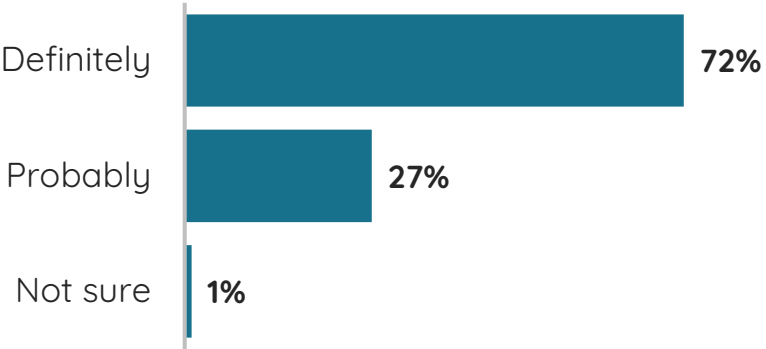
* Visitors staying in paid accommodations.

TRIP ACTIVITIES*

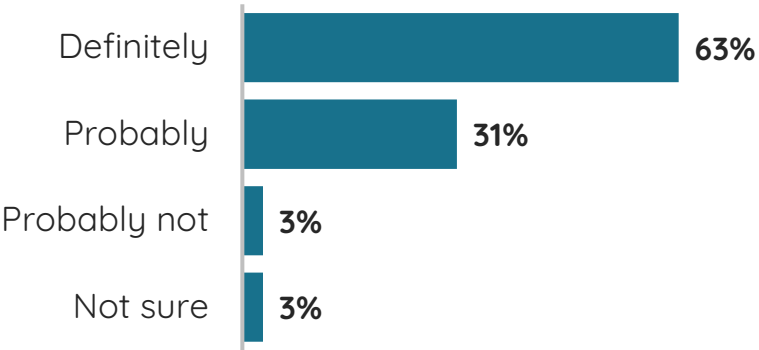


¹ Multiple responses permitted.
* Visitors staying in paid accommodations.

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.

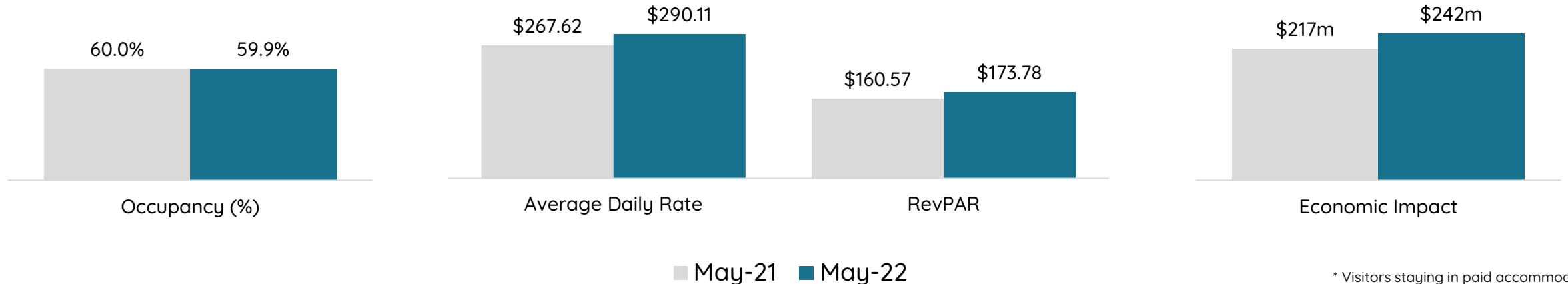
MAY 2022 METRICS



MAY 2022 OVERNIGHT VISITATION & LODGING*

	May 2021	May 2022	% Change from 2021
Occupancy Rate	60.0%	59.9%	- 0.2%
Average Daily Rate	\$267.62	\$290.11	+ 8.4%
RevPAR	\$160.57	\$173.78	+ 8.2%

	May 2021	May 2022	% Change from 2021
Visitors	138,600	150,100	+ 8.3%
Room Nights	206,600	232,900	+ 12.7%
Direct Spending	\$145,371,100	\$162,569,100	+ 11.8%
Economic Impact	\$216,748,300	\$242,390,500	+ 11.8%



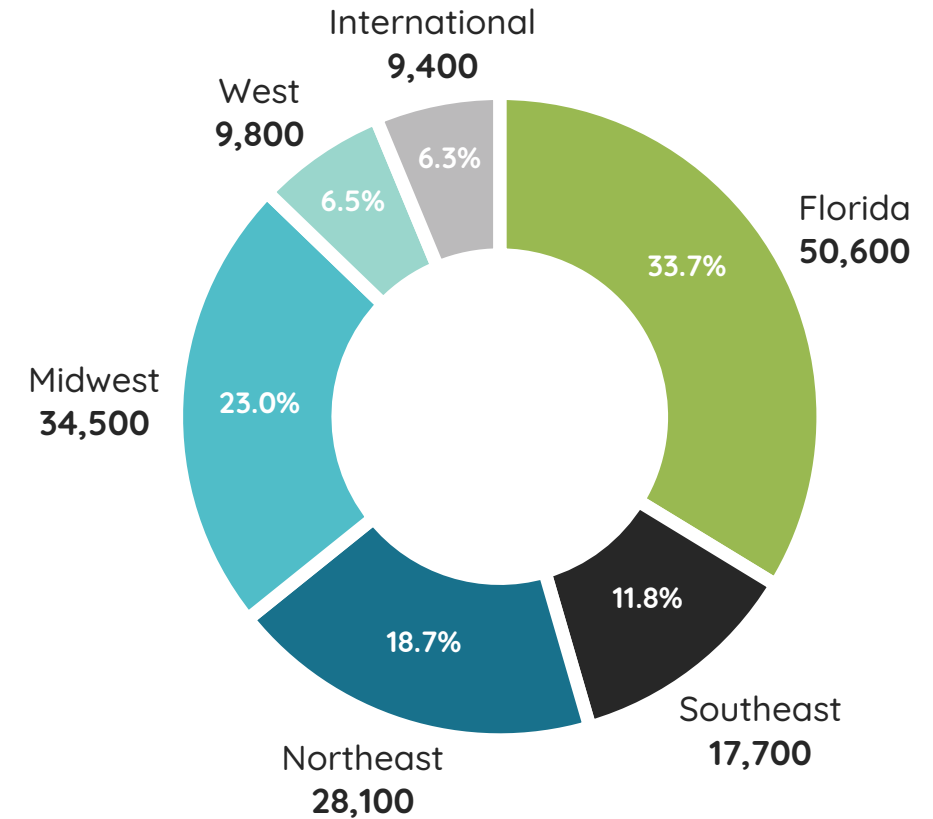
* Visitors staying in paid accommodations.

MAY 2022 OVERNIGHT VISITOR ORIGIN MARKETS*

Region	May 2021		May 2022		Percent Change (Δ%)	
	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	93,200	67.2%	50,600	33.7%	- 45.7%	- 49.9%
Southeast	10,900	7.9%	17,700	11.8%	+ 62.4%	+ 49.4%
Northeast	18,700	13.5%	28,100	18.7%	+ 50.3%	+ 38.5%
Midwest	15,400	11.1%	34,500	23.0%	+ 124.0%	+ 107.2%
West ¹	-	-	9,800	6.5%	-	-
Canada ²	-	-	2,700	1.8%	-	-
Europe ²	400	0.3%	5,100	3.4%	+ 1175.0%	+ 1033.3%
C/S America ²	-	-	200	0.1%	-	-
Other	-	-	1,400	1.0%	-	-
Total	138,600	100.0%	150,100	100.0%		

¹ Visitation from western U.S. states not separated from "other" category in May 2021.

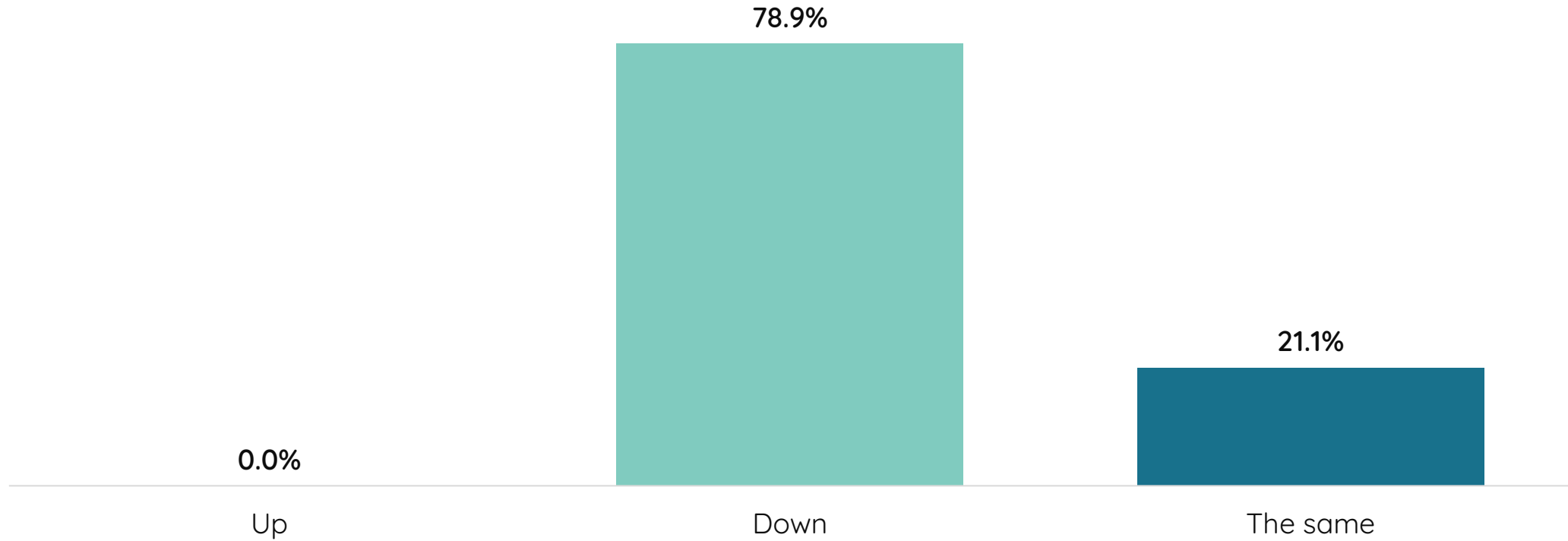
² Visitation from international markets was too small to estimate for most of 2020 and 2021.



* Visitors staying in paid accommodations.

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?

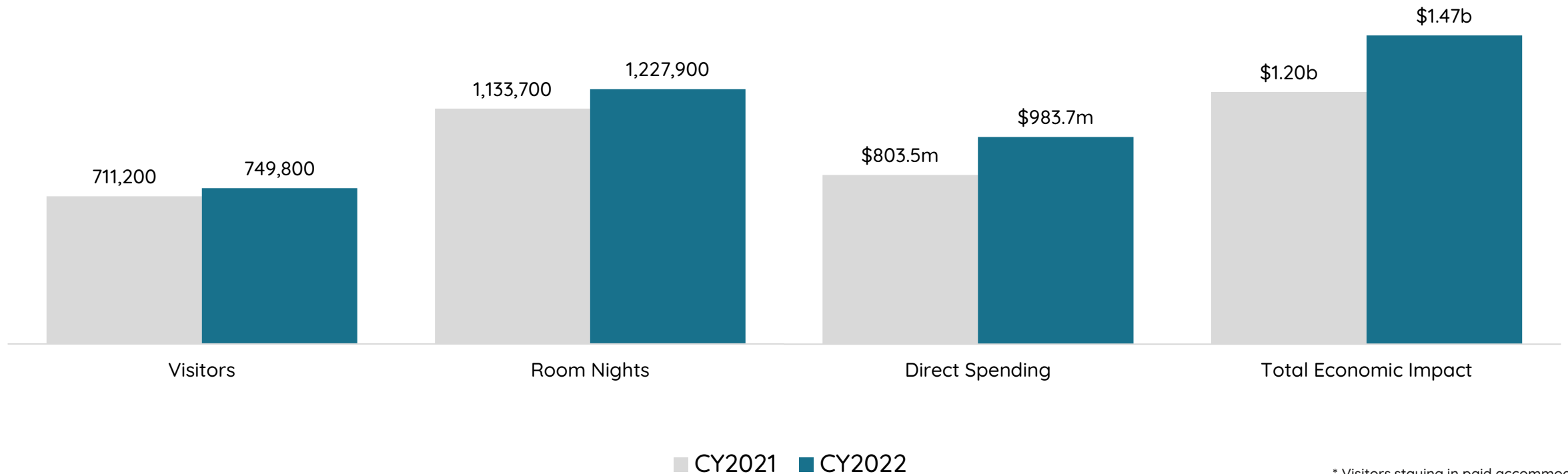


CALENDAR YEAR- TO-DATE METRICS



CYTD OVERNIGHT VISITATION & LODGING*

	CYTD 2021	CYTD 2022	% Change from 2021
Visitors	711,200	749,800	+ 5.4%
Room Nights	1,133,700	1,227,900	+ 8.3%
Direct Spending	\$803,462,400	\$983,687,900	+ 22.4%
Economic Impact	\$1,197,962,500	\$1,466,678,700	+ 22.4%



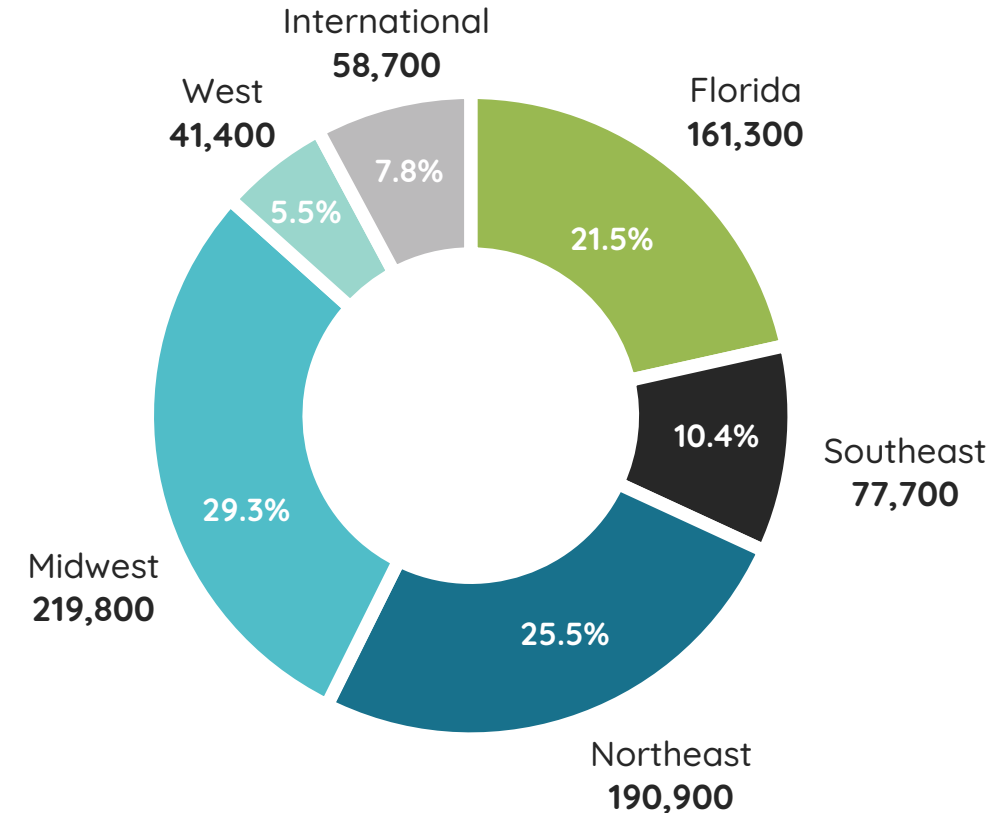
* Visitors staying in paid accommodations.

CYTD OVERNIGHT VISITOR ORIGIN MARKETS*

Region	CY2021		CY2022		Percent Change (Δ%)	
	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	319,400	45.0%	161,300	21.5%	- 49.5%	- 52.2%
Southeast	59,900	8.4%	77,700	10.4%	+ 29.7%	+ 23.8%
Northeast	175,100	24.6%	190,900	25.5%	+ 9.0%	+ 3.7%
Midwest	140,800	19.8%	219,800	29.3%	+ 56.1%	+ 48.0%
West ¹	-	-	41,400	5.5%	-	-
Canada ²	2,900	0.4%	15,500	2.1%	+ 434.5%	+ 425.0%
Europe ²	13,100	1.8%	30,000	4.0%	+ 129.0%	+ 122.2%
C/S America ²	-	-	5,400	0.7%	-	-
Other	-	-	7,800	1.0%	-	-
Total	711,200	100.0%	749,800	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.

MAY 2022 VISITOR PROFILE

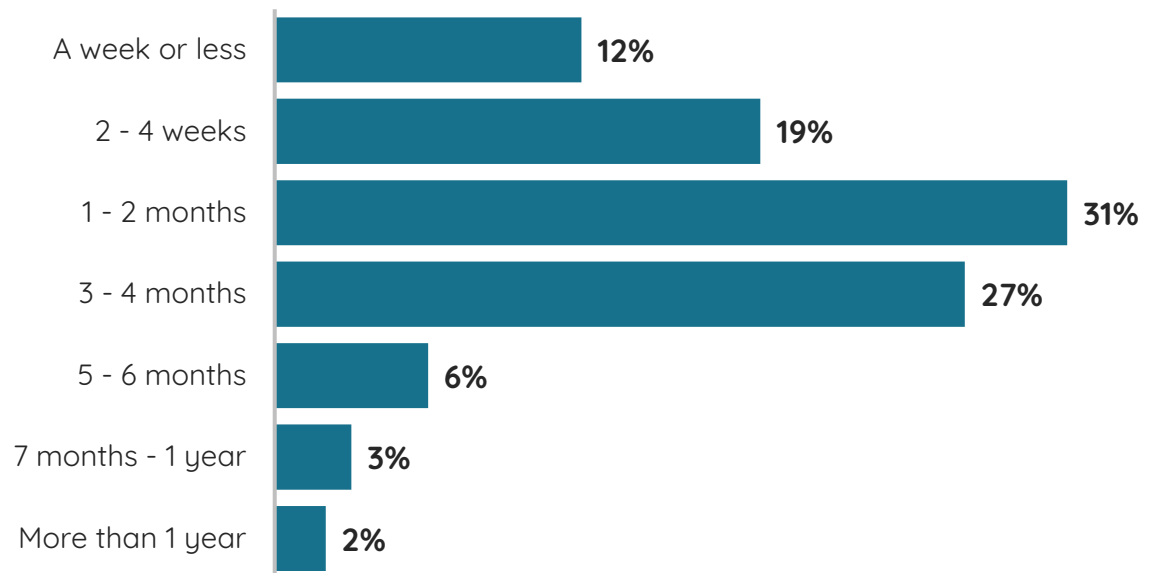
OF OVERNIGHT VISITORS



TRIP PLANNING DECISIONS*

Trip Planning Cycle			
	May-21	May-22	Trend
A week or less	-	12%	-
2 - 4 weeks	-	19%	-
1 - 2 months	-	31%	-
3 - 4 months	-	27%	-
5 - 6 months	-	6%	-
7 months - 1 year	-	3%	-
More than 1 year	-	2%	-
Median (days)	-	50	-

¹Multiple responses permitted.



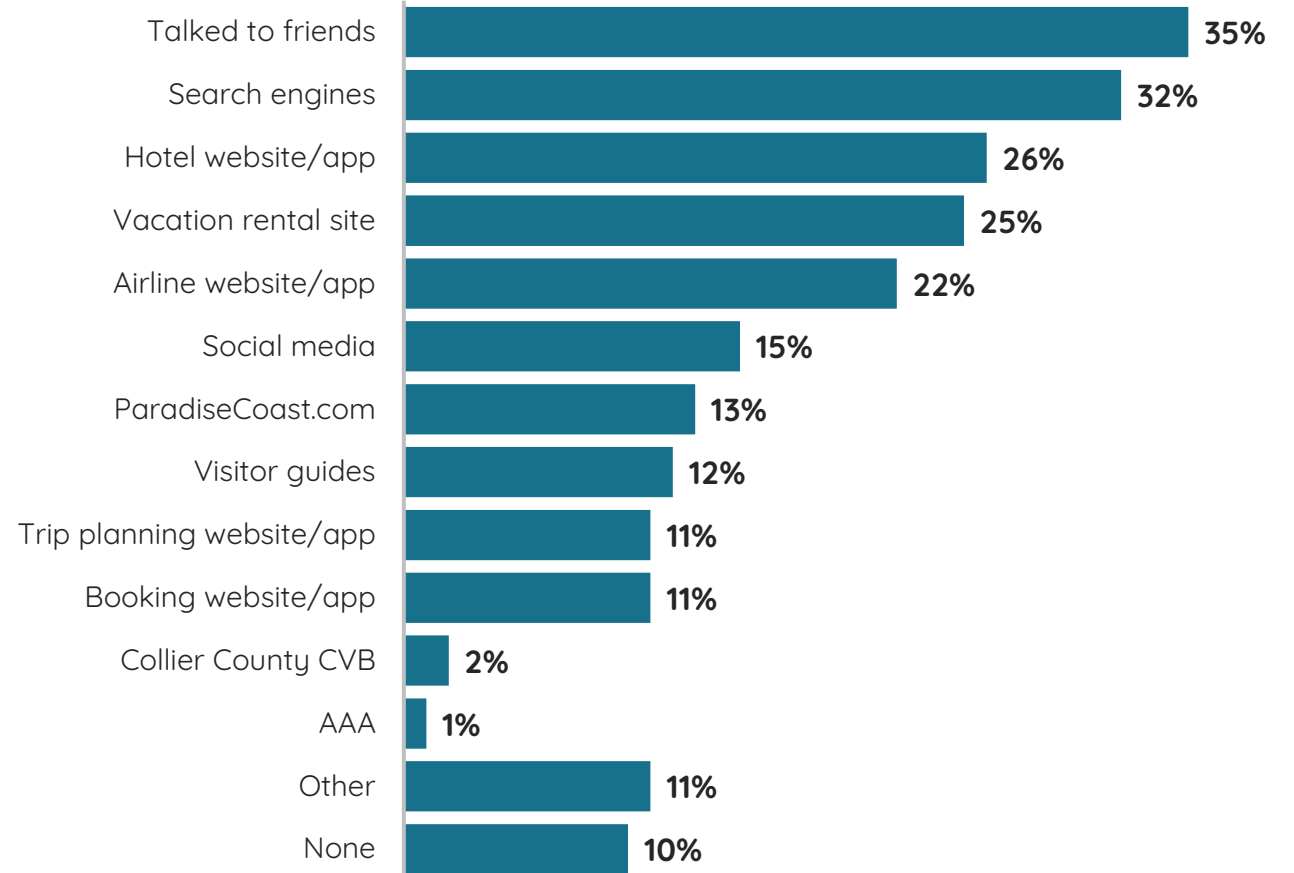
* Visitors staying in paid accommodations.

TRIP PLANNING DECISIONS*

Top Trip Planning Resources¹

	May-21	May-22	Trend
Talked to friends	-	35%	-
Search engines	-	32%	-
Hotel website/app	-	26%	-
Vacation rental site	-	25%	-
Airline website/app	-	22%	-
Social media	-	15%	-
ParadiseCoast.com	-	13%	-
Visitor guides	-	12%	-
Booking website/app	-	11%	-
Trip planning website/app	-	11%	-
Collier County CVB	-	2%	-
AAA	-	1%	-
Other	-	11%	-
None	-	10%	-

¹ Multiple responses permitted.

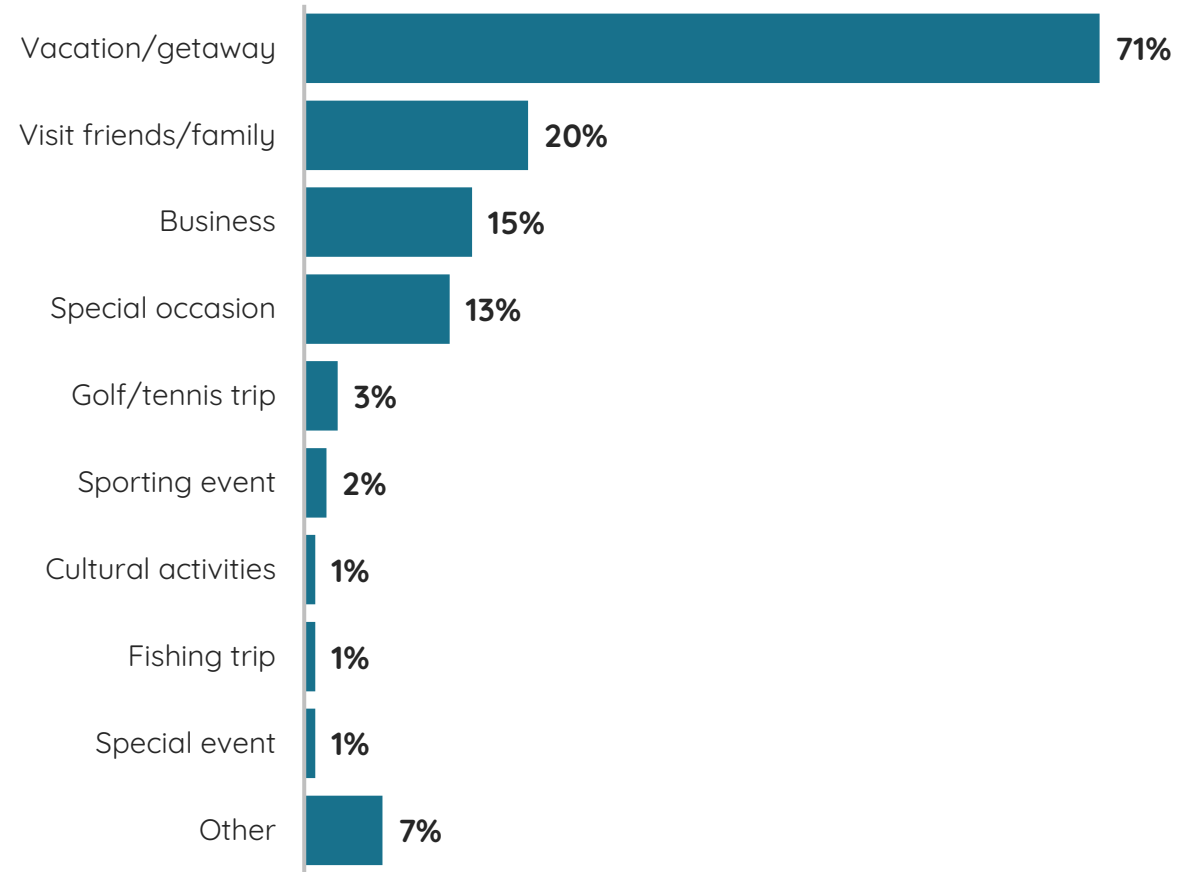


* Visitors staying in paid accommodations.

REASONS FOR VISITING*

Top Reasons for Visiting ¹			
	May-21	May-22	Trend
Vacation/getaway	88%	71%	↓
Visit friends/family	7%	20%	↑
Business	-	15%	-
Special occasion	-	13%	-
Golf/tennis trip	-	3%	-
Sporting event	5%	2%	↓
Special event	-	1%	-
Fishing trip	-	1%	-
Cultural activities	-	1%	-
Other	11%	7%	↓

¹ Multiple responses permitted.

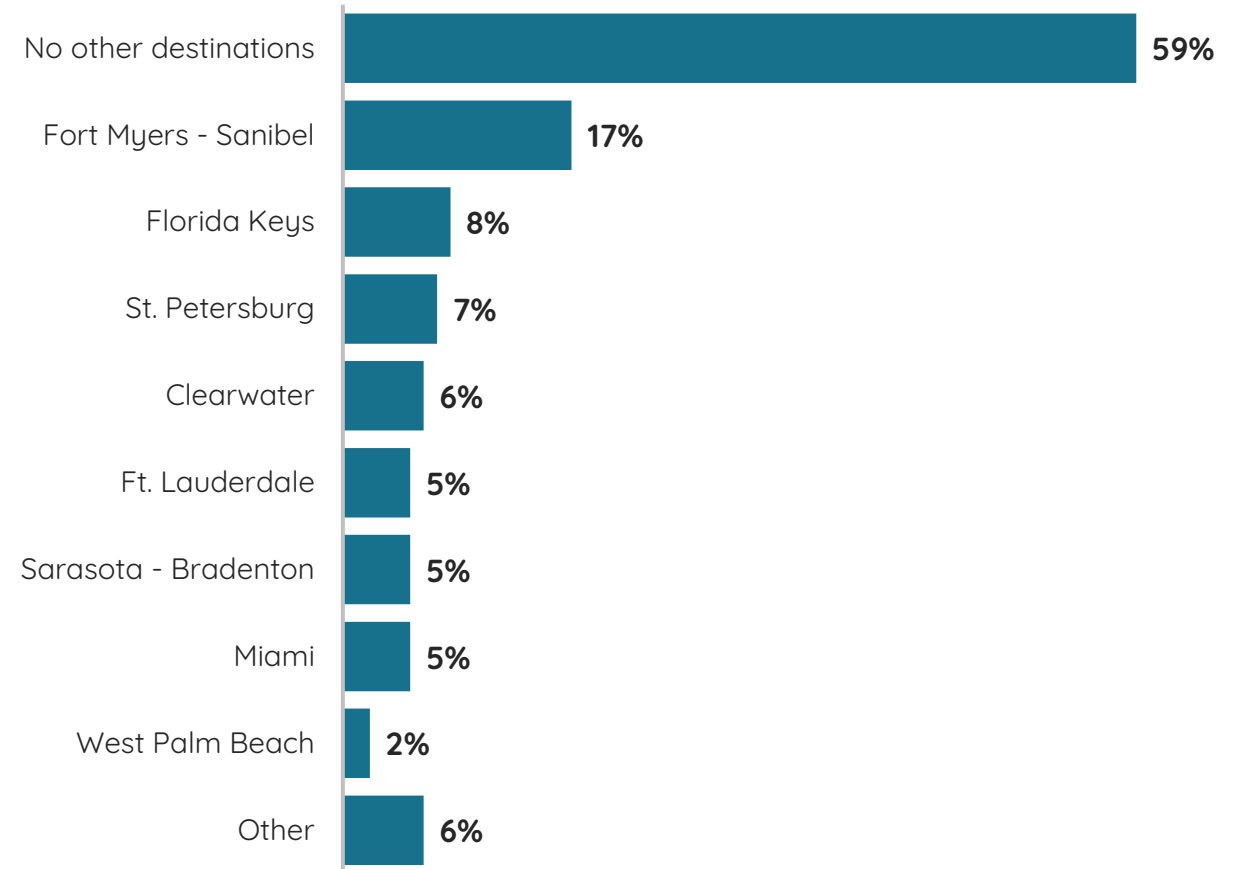


* Visitors staying in paid accommodations.

DECISIONS TO VISIT*

Other Destinations Considered ¹			
	May-21	May-22	Trend
No other destinations	-	59%	-
Fort Myers - Sanibel	-	17%	-
Florida Keys	-	8%	-
St. Petersburg	-	7%	-
Clearwater	-	6%	-
Miami	-	5%	-
Sarasota - Bradenton	-	5%	-
Ft. Lauderdale	-	5%	-
West Palm Beach	-	2%	-
Other	-	6%	-

¹ Multiple responses permitted.

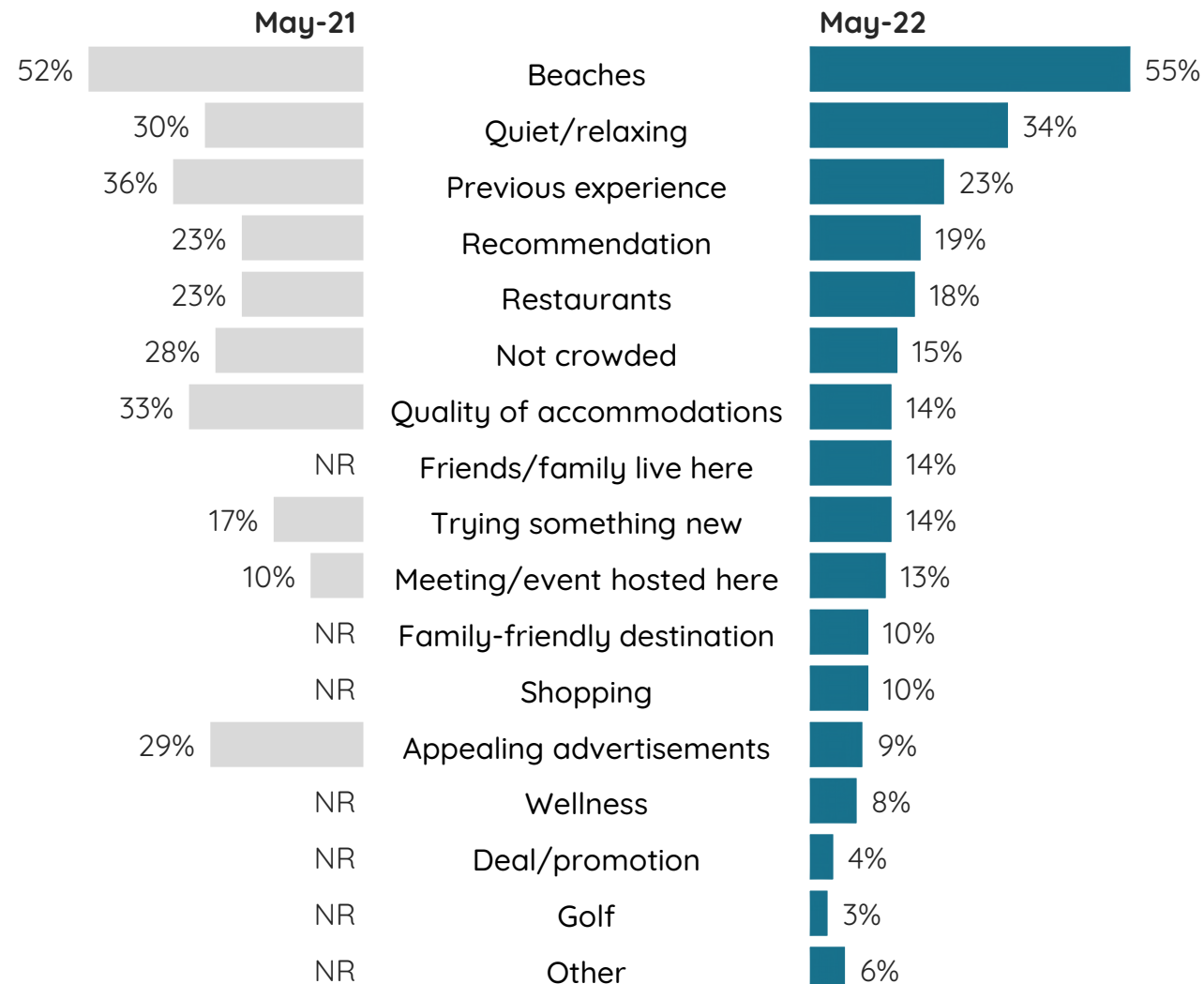


* Visitors staying in paid accommodations.

REASONS FOR CHOOSING AREA*

Reasons for Choosing Area ¹			
	May-21	May-22	Trend
Beaches	52%	55%	↑
Quiet/relaxing	30%	34%	↑
Previous experience	36%	23%	↓
Recommendation	23%	19%	↓
Restaurants	23%	18%	↓
Not crowded	28%	15%	↓
Quality of accommodations	33%	14%	↓
Friends/family live here	-	14%	-
Trying something new	17%	14%	↓
Meeting/event hosted here	10%	13%	↑
Family-friendly destination	-	10%	-
Shopping	-	10%	-
Appealing advertisements	29%	9%	↓
Wellness	-	8%	-
Deal/promotion	-	4%	-
Golf	-	3%	-
Other	-	6%	-

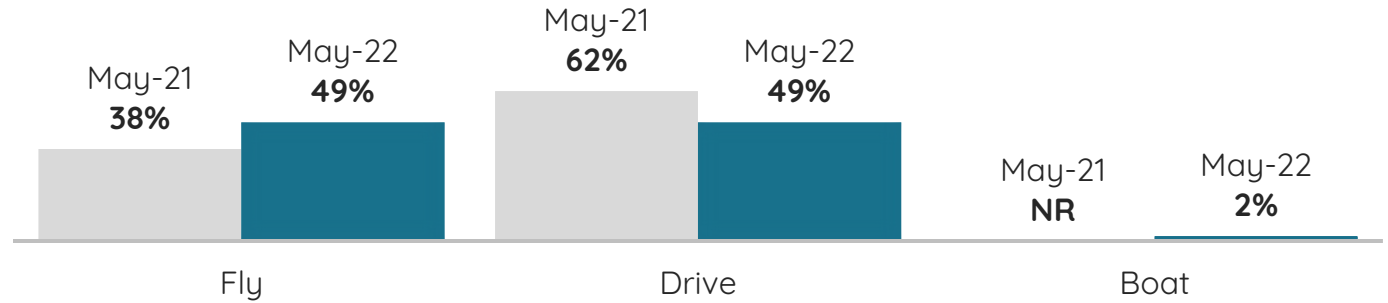
¹ Multiple responses permitted.



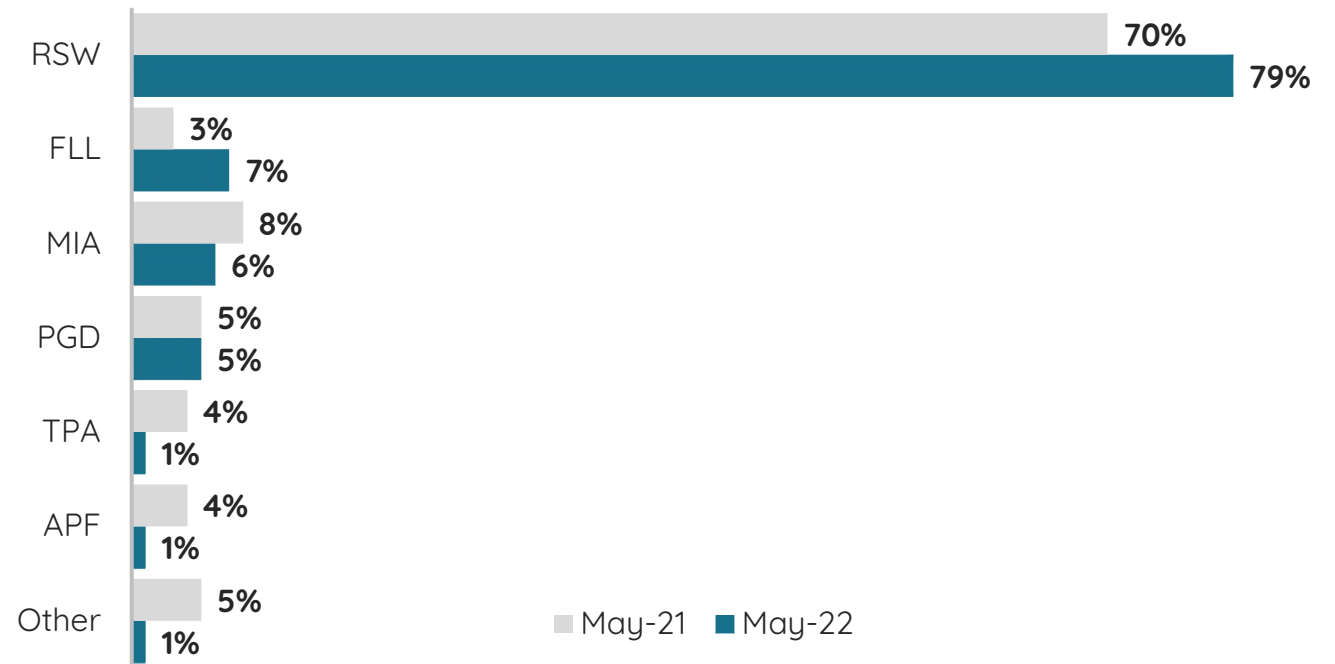
* Visitors staying in paid accommodations.

TRANSPORTATION METHODS*

Mode of Transportation			
	May-21	May-22	Trend
Fly	38%	49%	↑
Drive	62%	49%	↓
Boat	-	2%	-



Airport Deplaned (Base: Fly)			
	May-21	May-22	Trend
SWFL Intl Airport (RSW)	70%	79%	↑
Ft. Lauderdale Intl Airport (FLL)	3%	7%	↑
Miami Intl Airport (MIA)	8%	6%	↓
Punta Gorda Airport (PGD)	5%	5%	↔
Tampa Intl Airport (TPA)	4%	1%	↓
Naples Intl Airport (APF)	4%	1%	↓
Other	5%	1%	↓



* Visitors staying in paid accommodations.

EXPOSURE TO ADVERTISING*

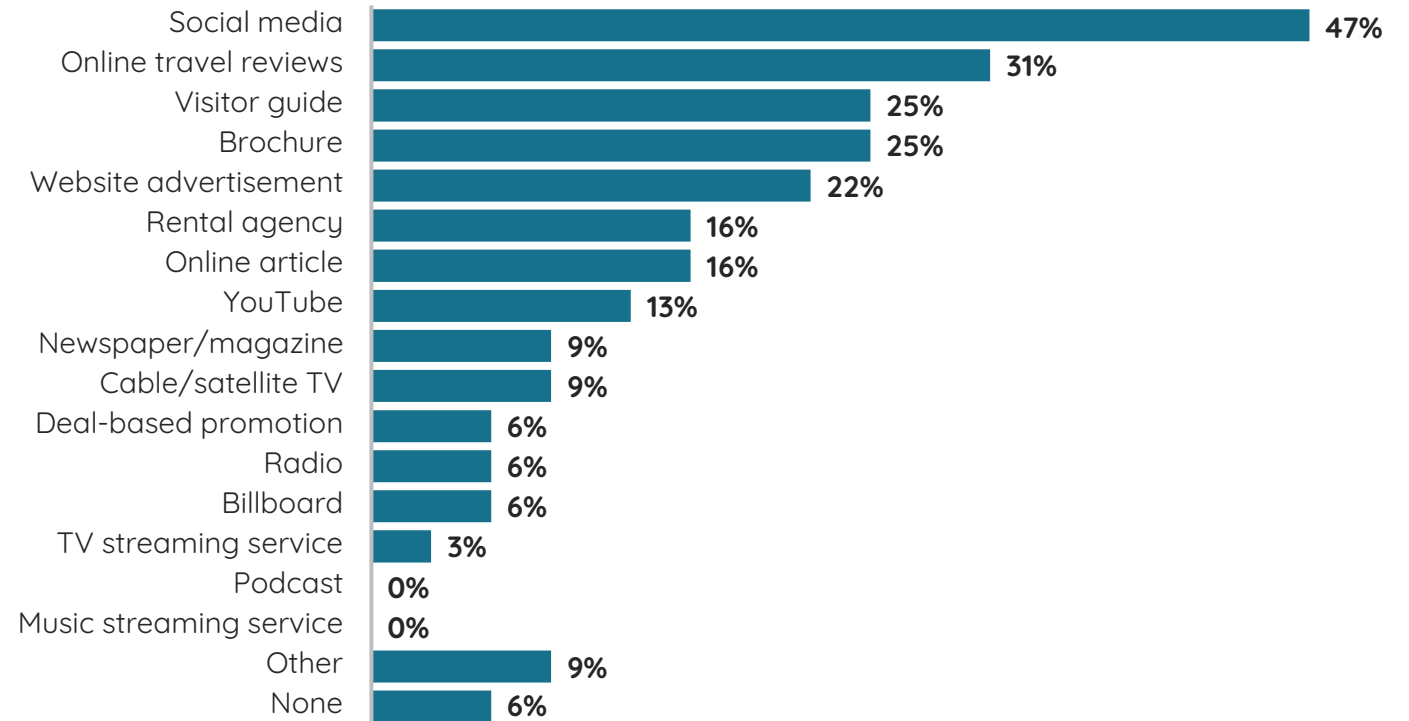
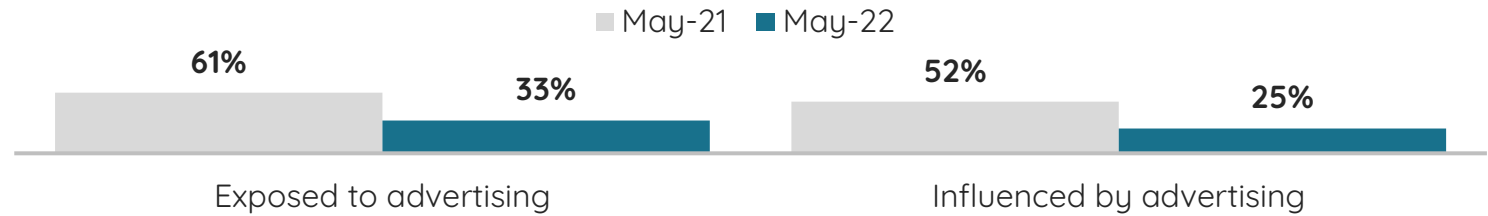
Advertising Exposure & Influence

	May-21	May-22	Trend
Exposed to advertising	61%	33%	↓
Influenced by advertising	52%	25%	↓

Top Advertising Sources Noticed¹

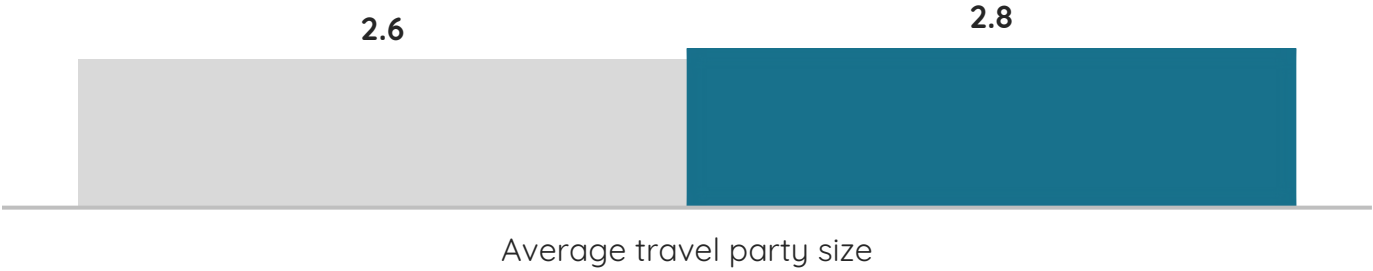
	May-21	May-22	Trend
Social media	-	47%	-
Online travel reviews	-	31%	-
Brochure	-	25%	-
Visitor guide	-	25%	-
Website advertisement	-	22%	-
Online article	-	16%	-
Rental agency	-	16%	-
YouTube	-	13%	-
Cable/satellite TV	-	9%	-
Newspaper/magazine	-	9%	-
Billboard	-	6%	-
Radio	-	6%	-
Deal-based promotion	-	6%	-
TV streaming service	-	3%	-
Music streaming service	-	0%	-
Podcast	-	0%	-
Other	-	9%	-
None	-	6%	-

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

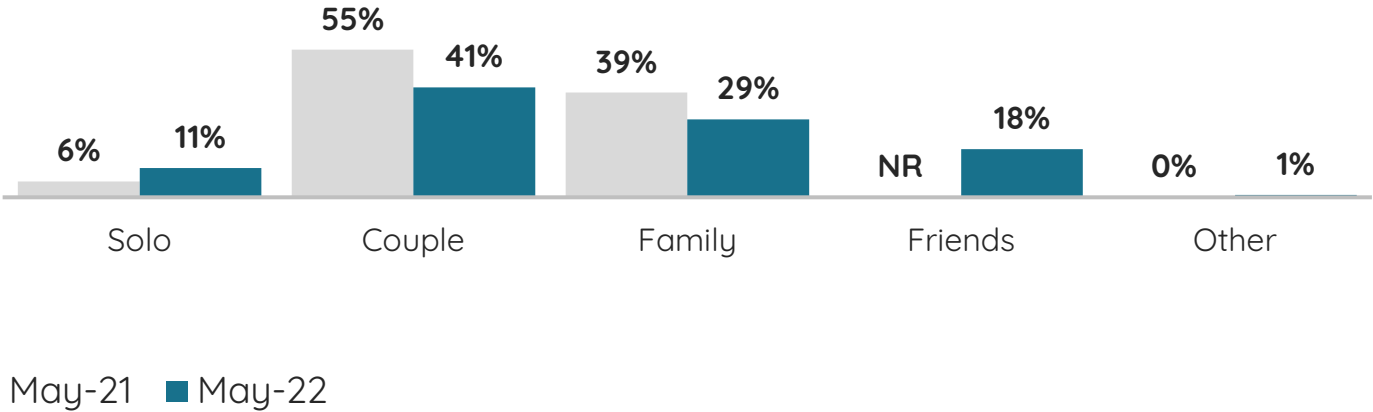


* Visitors staying in paid accommodations.

Average Visitors per Travel Party			
	May-21	May-22	Trend
Average travel party size	2.6	2.8	↑



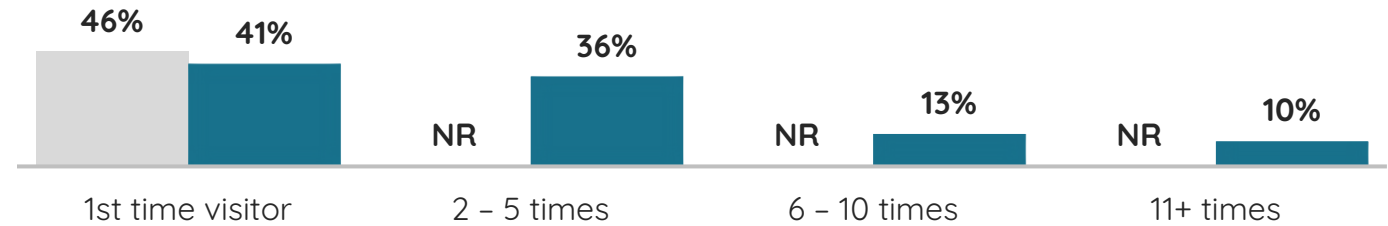
Travel Party Composition			
	May-21	May-22	Trend
Solo	6%	11%	↑
Couple	55%	41%	↓
Family	39%	29%	↓
Friends	-	18%	-
Other	0%	1%	↑



* Visitors staying in paid accommodations.

VISITING PARADISE COAST*

Previous Visits			
	May-21	May-22	Trend
1 st time visitor	46%	41%	↓
2 – 5 times	-	36%	-
6 – 10 times	-	13%	-
11+ times	-	10%	-



Typical Visitor Ages			
	May-21	May-22	Trend
Median Age	-	44	-
Average Age	46.6	45.8	↓

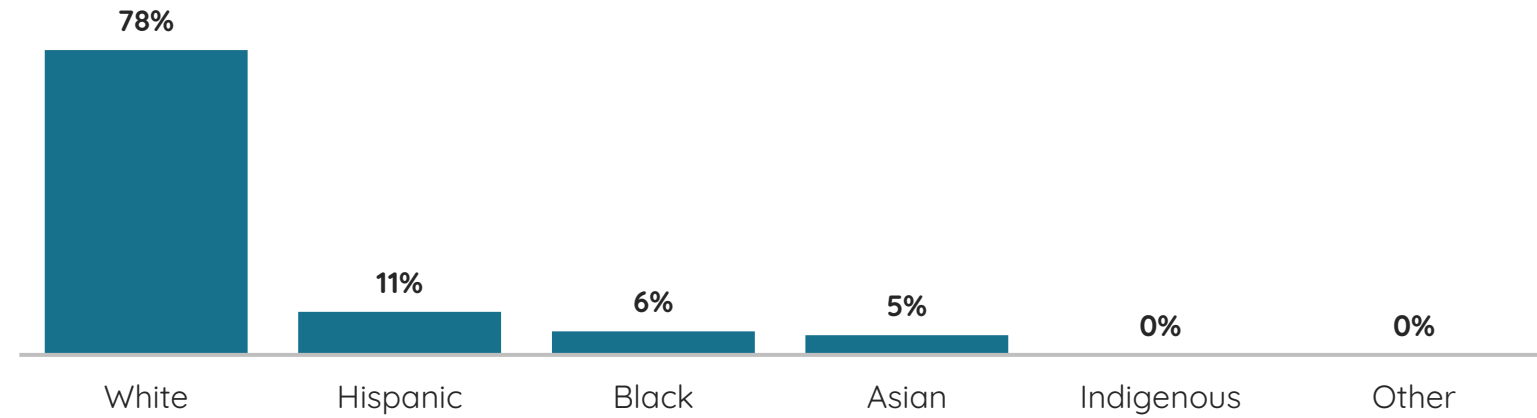


■ May-21 ■ May-22

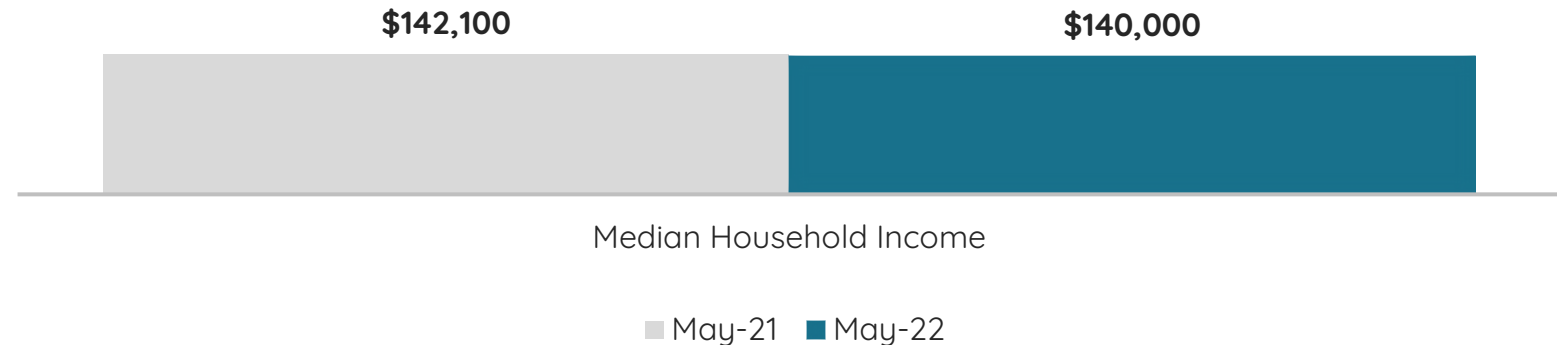
* Visitors staying in paid accommodations.

VISITOR DEMOGRAPHICS*

Race/Ethnicity			
	May-21	May-22	Trend
White	-	78%	-
Hispanic	-	11%	-
Black	-	6%	-
Asian	-	5%	-
Indigenous	-	0%	-
Other	-	0%	-



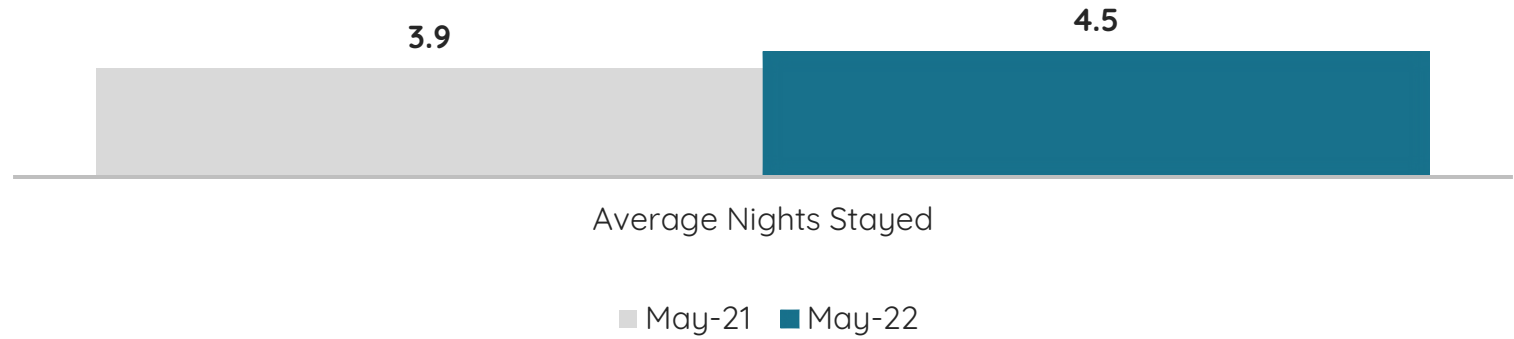
Typical Visitor Household Income			
	May-21	May-22	Trend
Median HHI	\$142,100	\$140,000	↓



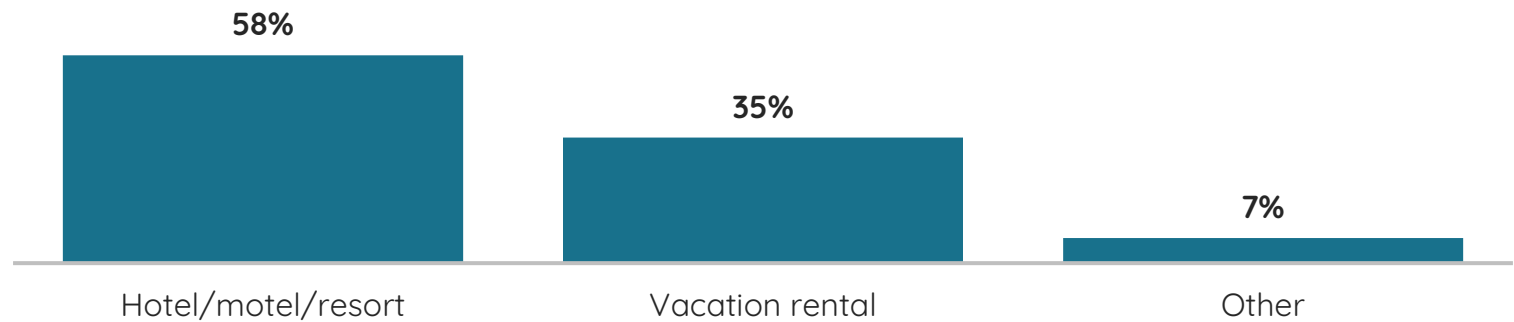
* Visitors staying in paid accommodations.

OVERNIGHT VISITS*

Nights in Destination			
	May-21	May-22	Trend
Nights Stayed (mean)	3.9	4.5	↑



Accommodations			
	May-21	May-22	Trend
Hotel/motel/resort	-	58%	-
Vacation rental	-	35%	-
Other	-	7%	-

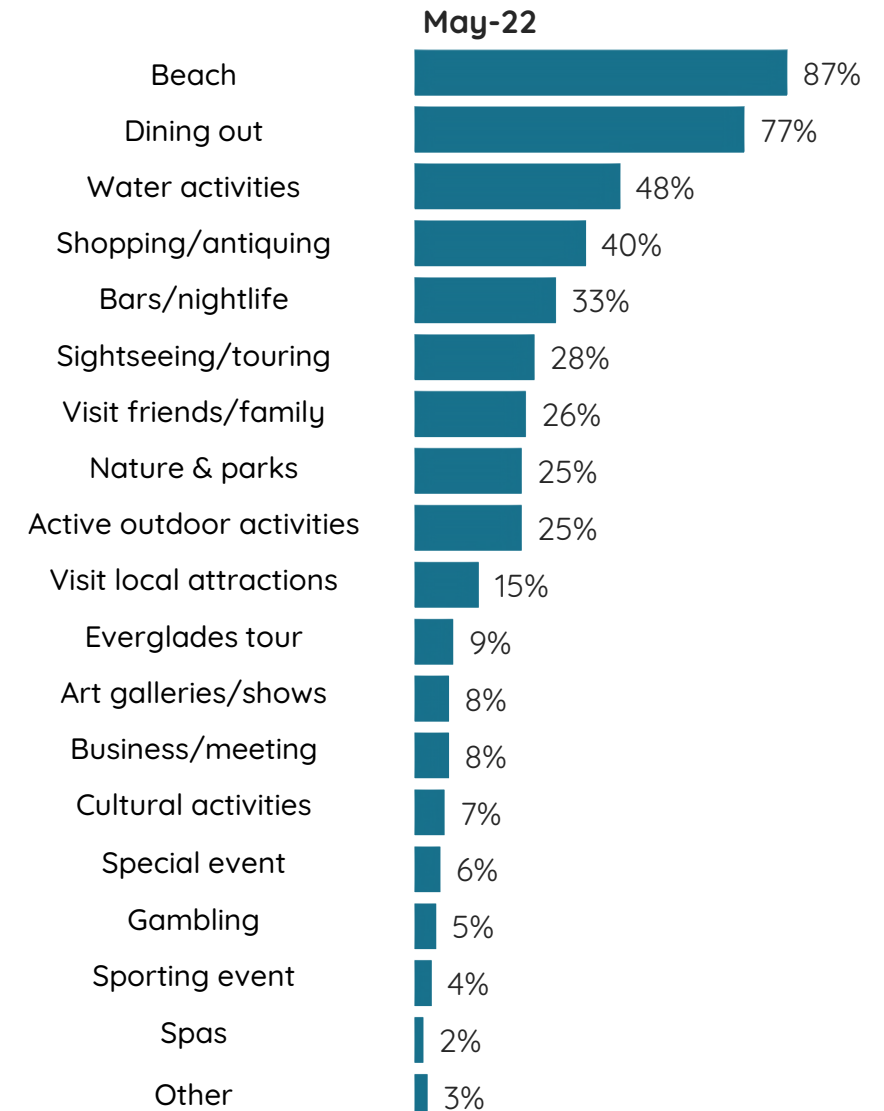
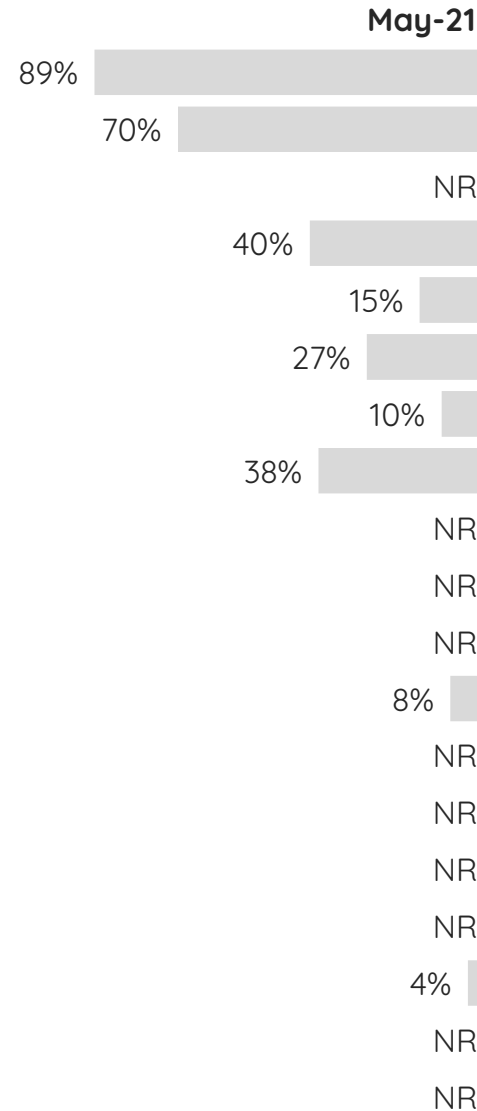


* Visitors staying in paid accommodations.

TRIP ACTIVITIES*

Trip Activities ¹			
	May-21	May-22	Trend
Beach	89%	87%	↓
Dining out	70%	77%	↑
Water activities	-	48%	-
Shopping/antiquing	40%	40%	↔
Bars/nightlife	15%	33%	↑
Sightseeing/touring	27%	28%	↑
Visit friends/family	10%	26%	↑
Nature & parks	38%	25%	↓
Active outdoor activities	-	25%	-
Visit local attractions	-	15%	-
Everglades tour	-	9%	-
Art galleries/shows	8%	8%	↑
Business/meeting	-	8%	-
Cultural activities	-	7%	-
Special event	-	6%	-
Gambling	-	5%	-
Sporting event	4%	4%	↔
Spas	-	2%	-
Other	-	3%	-

¹Multiple responses permitted.

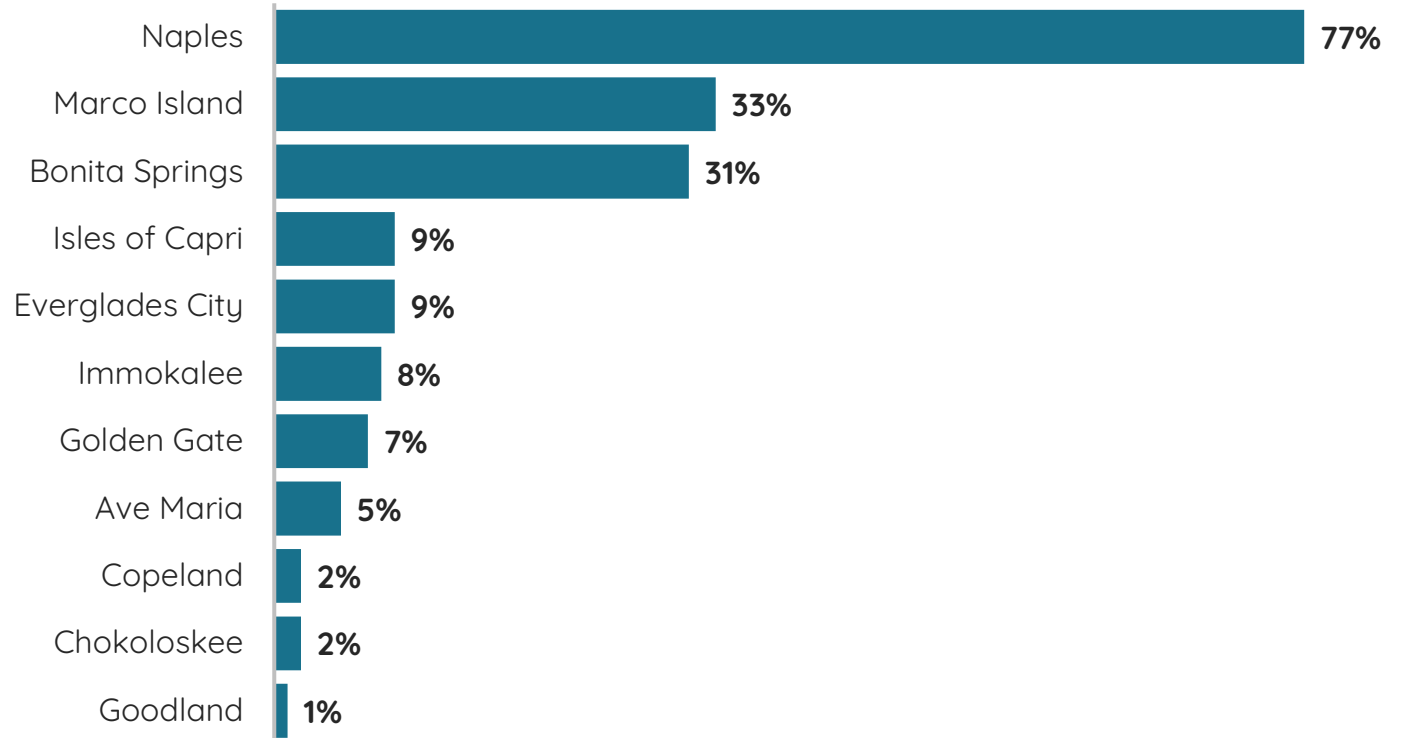


* Visitors staying in paid accommodations.

AREAS VISITED*

Areas Visited in Destination ¹			
	May-21	May-22	Trend
Naples	-	77%	-
Marco Island	-	33%	-
Bonita Springs	-	31%	-
Isles of Capri	-	9%	-
Everglades City	-	9%	-
Immokalee	-	8%	-
Golden Gate	-	7%	-
Ave Maria	-	5%	-
Copeland	-	2%	-
Chokoloskee	-	2%	-
Goodland	-	1%	-

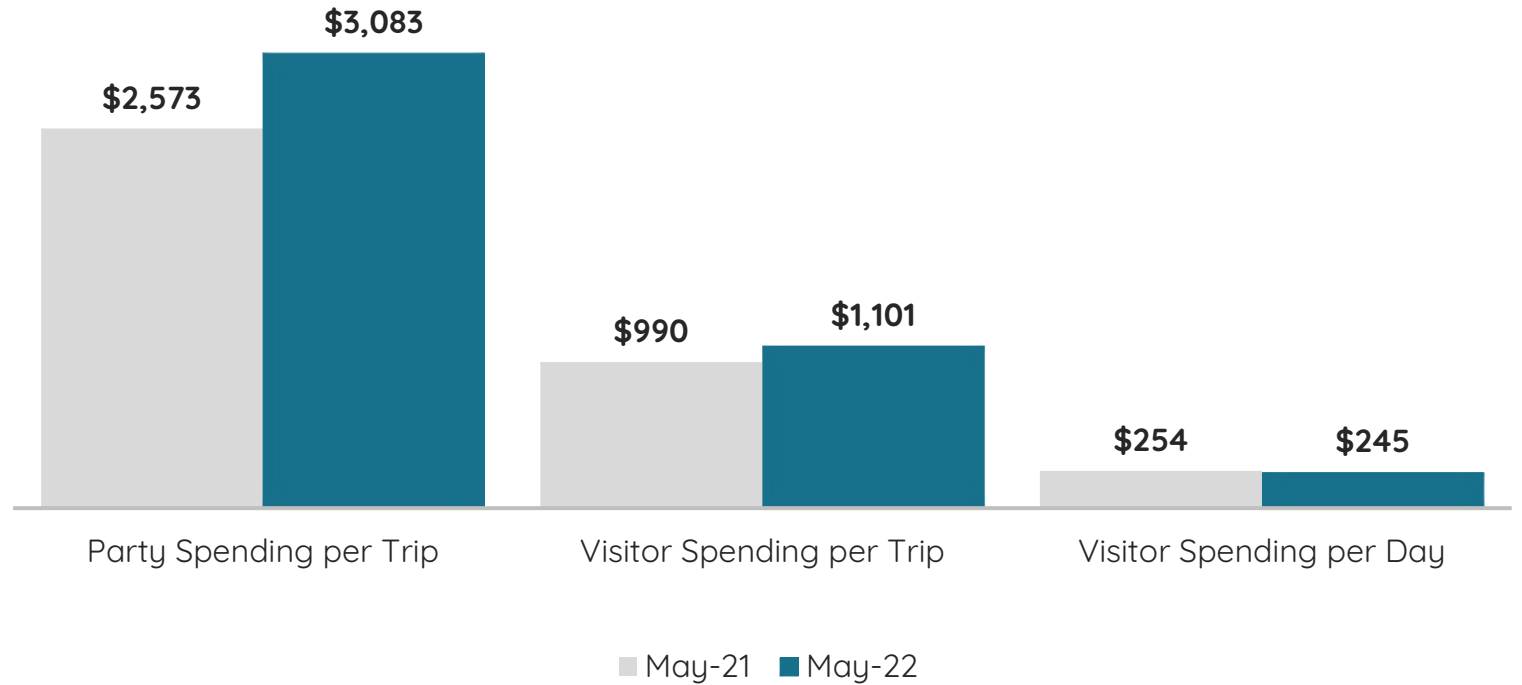
¹ Multiple responses permitted.



* Visitors staying in paid accommodations.

VISITOR SPENDING*

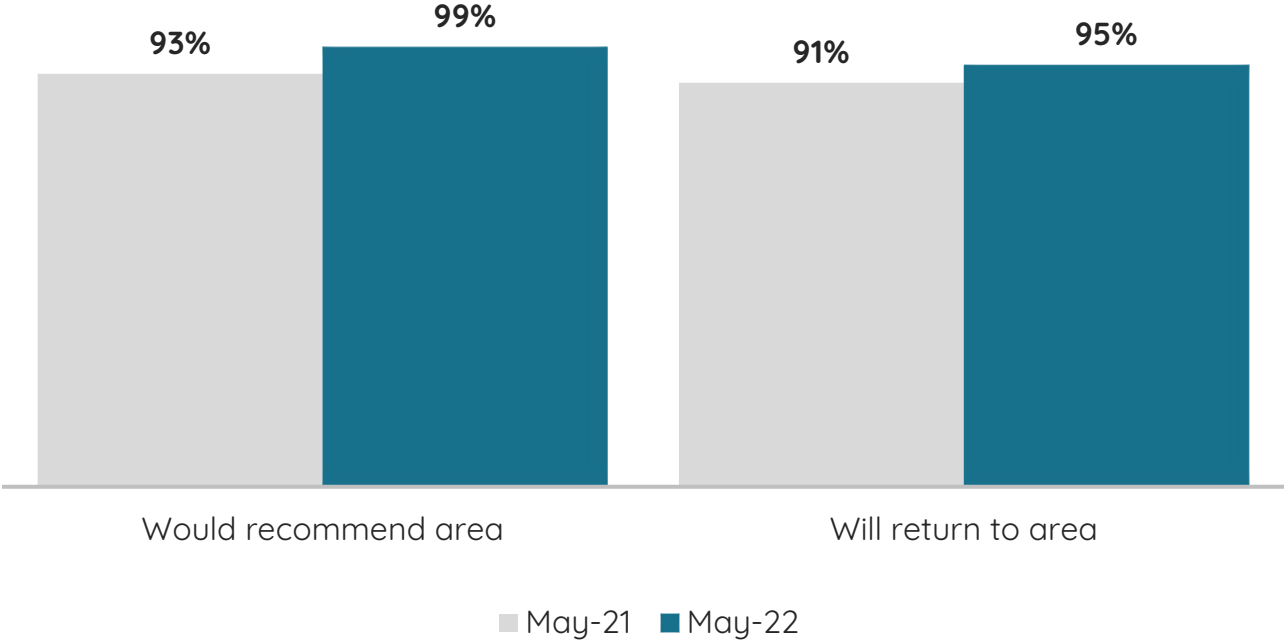
Visitor Spending			
	May-21	May-22	Trend
Party Spending per Trip	\$2,573	\$3,083	↑
Visitor Spending per Trip	\$990	\$1,101	↑
Visitor Spending per Day	\$254	\$245	↓



* Visitors staying in paid accommodations.

Satisfaction with Destination			
	May-21	May-22	Trend
Value for travel dollar ¹	-	8.6	-
Would recommend area	93%	99%	↑
Will return to area	91%	95%	↑

¹10-point scale where 10 is “excellent” and 1 is “poor”.

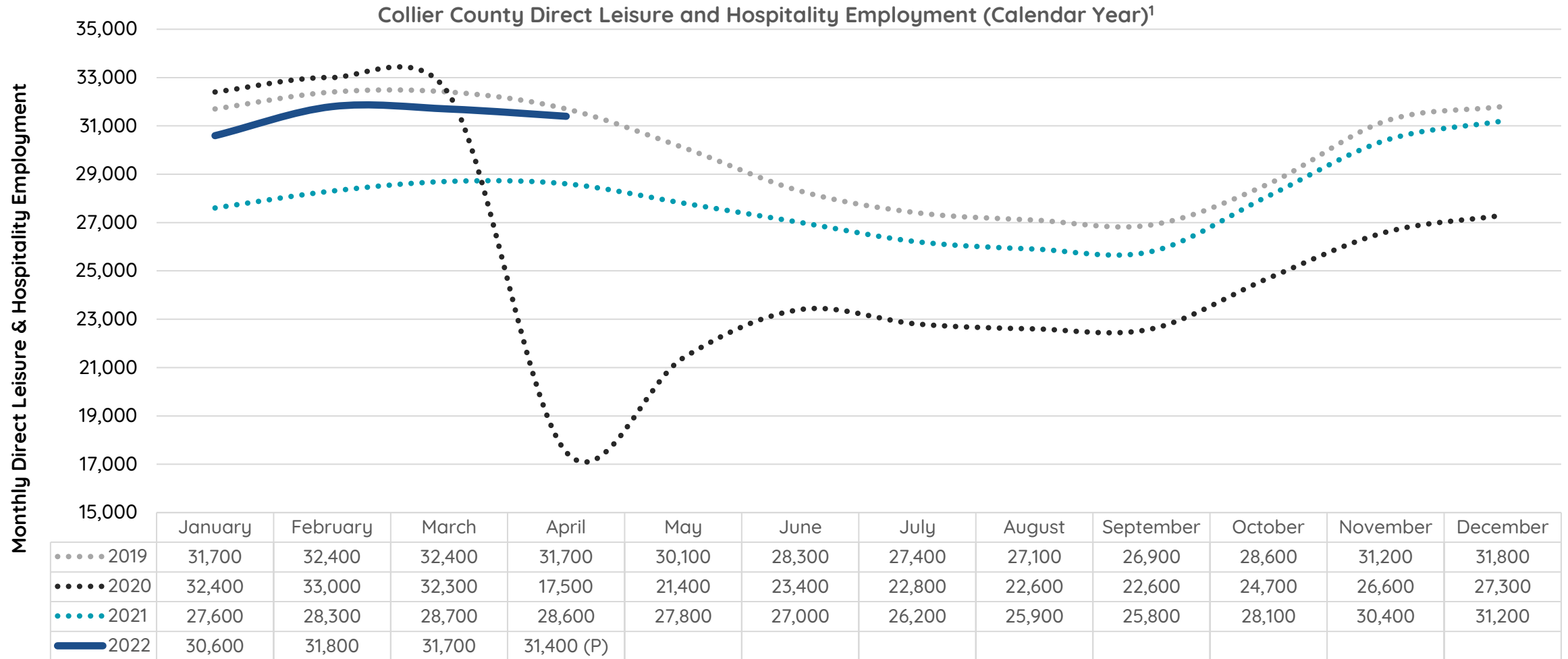


* Visitors staying in paid accommodations.

INDUSTRY DATA

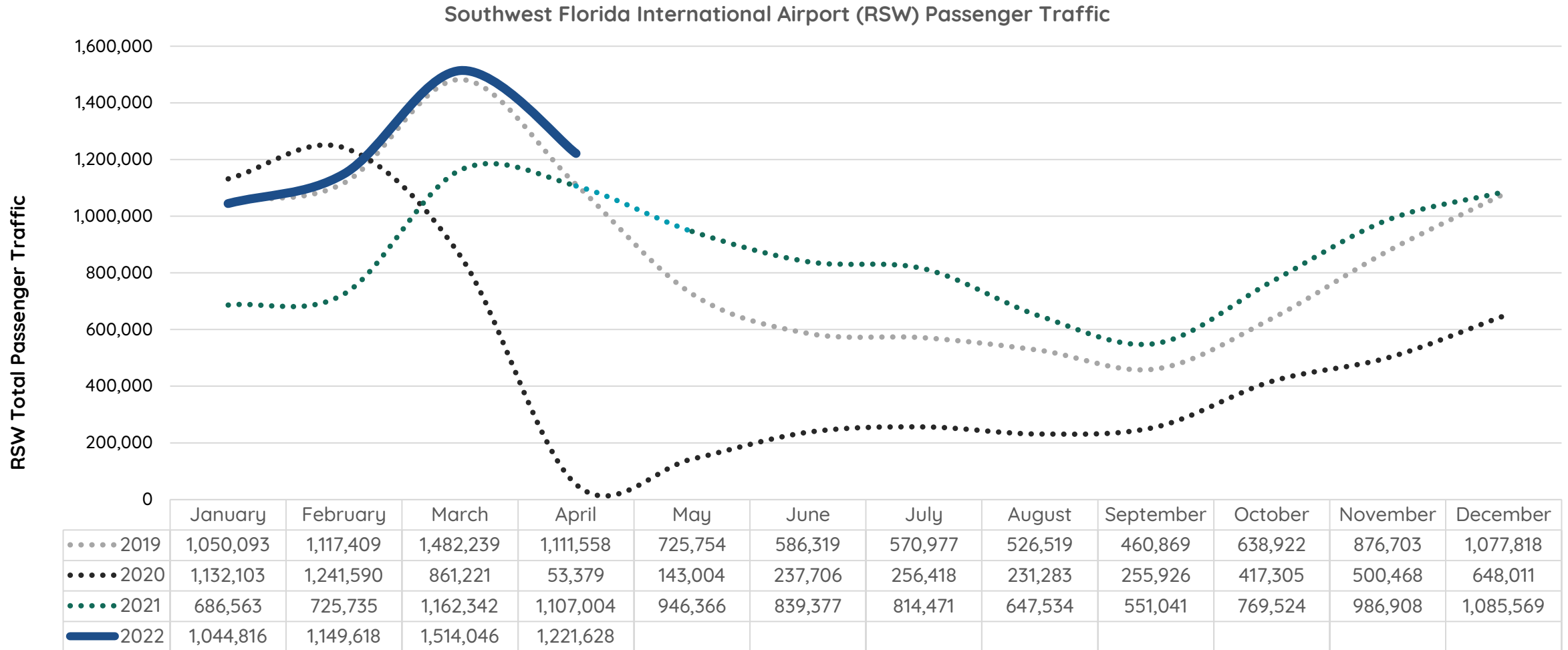


LEISURE & HOSPITALTY EMPLOYMENT



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

RSW PASSENGER TRAFFIC



¹SOURCE: Lee County Port Authority Monthly Statistics.

LICENSED TRANSIENT RENTAL UNITS

May 2022 Licensed Transient Rental Units ¹				
	Hotel	Motel	Vacation Rental	Total
Naples	4,391	1,545	3,067	9,003
Marco Island	1,275	115	1,659	3,049
Immokalee	0	55	104	159
Golden Gate	0	150	0	150
Everglades City	38	36	14	88
Bonita Springs	0	5	60	65
Chokoloskee	0	13	2	15
Goodland	0	5	4	9
Ochopee	0	0	2	2
Ave Maria	0	0	1	1
Total	5,704	1,924	4,913	12,541

¹SOURCE: Florida Department of Business & Professional Regulation.

NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau May 2022 Monthly Dashboard

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