

# NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau  
November 2022 Monthly Dashboard





Occupancy, RevPAR, Room Nights, Spending, and Economic Impact all saw YOY increases in November.



The median number of days that visitors spent planning their trips increased to 81 in November, 37 days longer than 2021.



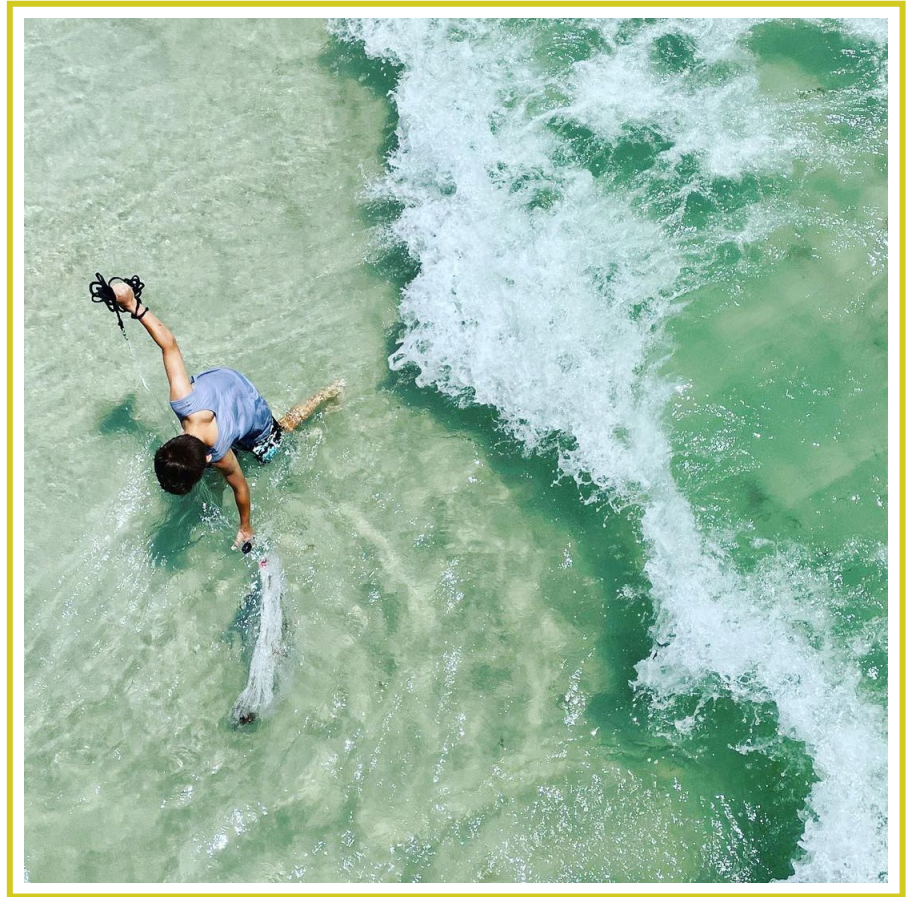
Visitors believe it will be early or late 2023 before the destination will recover enough to make a trip to the area feel normal.



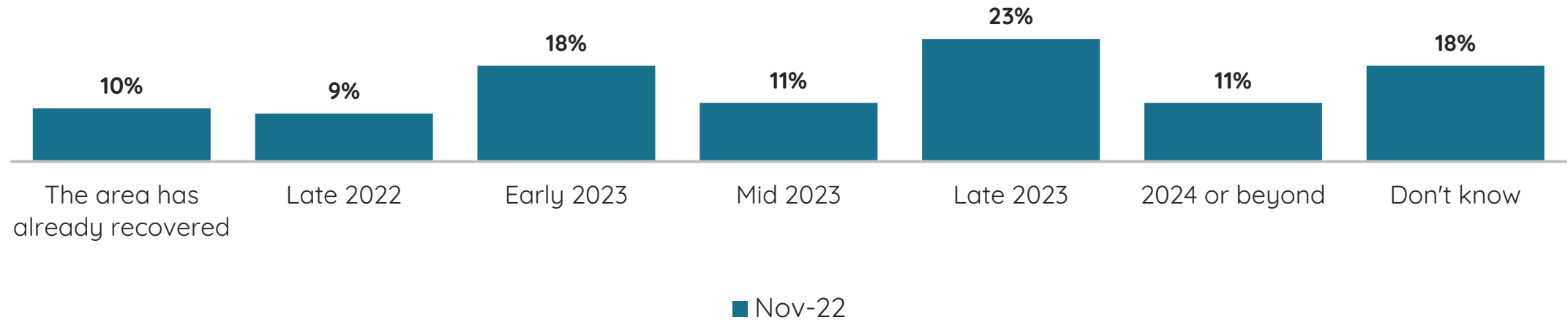
Compared to 2021, more visitors were coming from outside of Florida.



Occupancy was up significantly, but a longer length of stay and fewer people per travel party resulted in a fewer number of visitors in November 2022. This is due to the influx of visitors coming to the area for hurricane recovery.



## HURRICANE RECOVERY

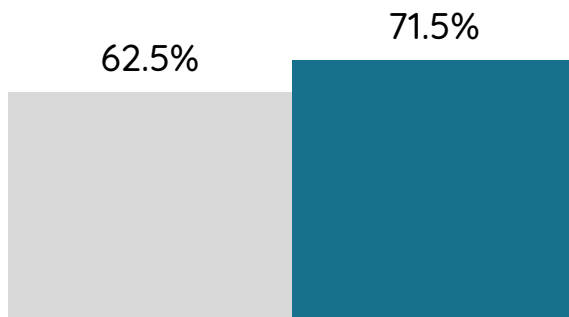


\* Visitors staying in paid accommodations.  
“When do you think Florida’s Paradise Coast will recover enough to make a trip to the area feel back to normal?”

# NOVEMBER 2022 LODGING METRICS\*

## OCCUPANCY RATE

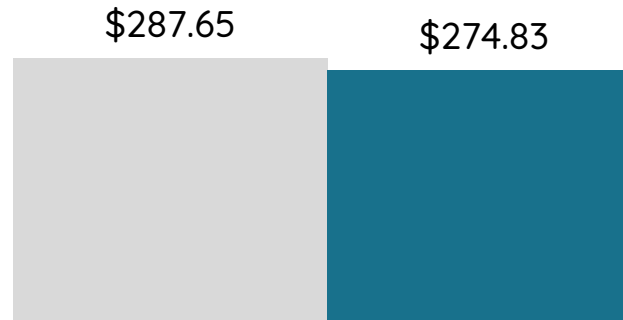
**71.5%**



+ 14.4% from 2021

## AVERAGE DAILY RATE

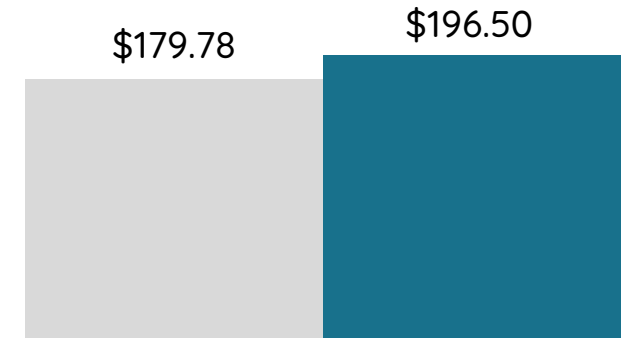
**\$274.83**



- 4.5% from 2021

## REVENUE PER AVAILABLE ROOM

**\$196.50**

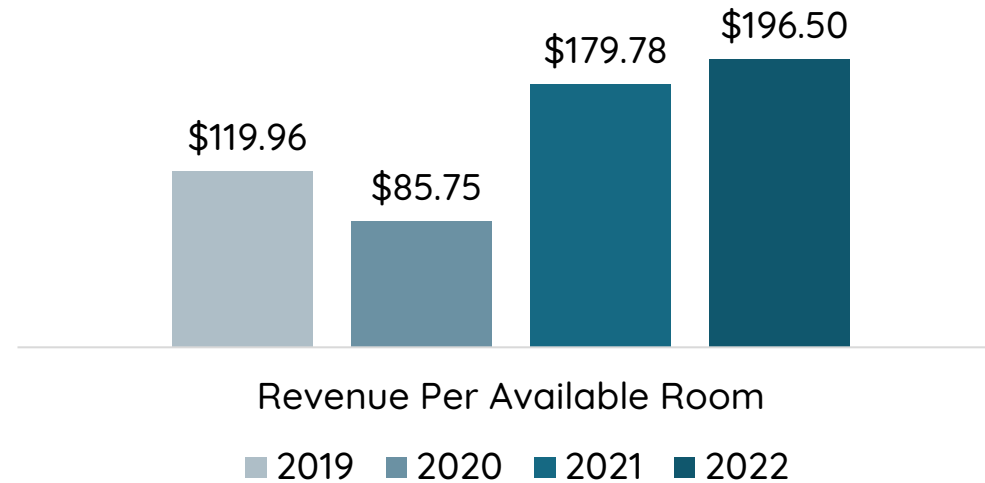
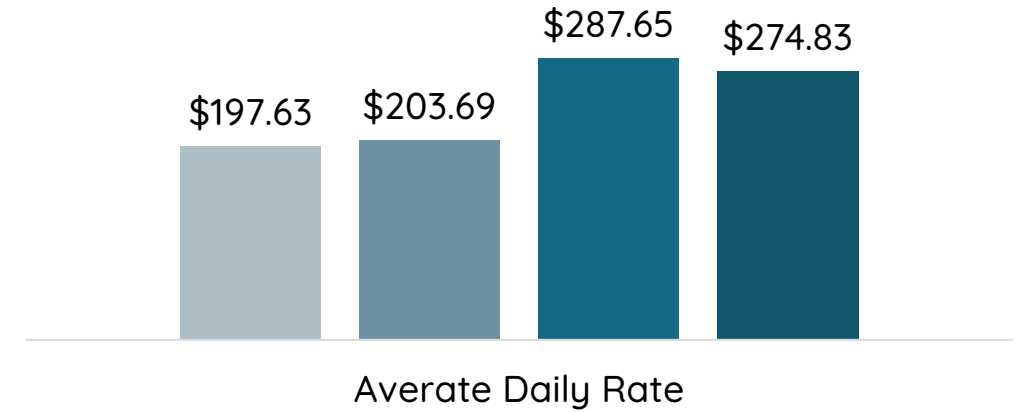
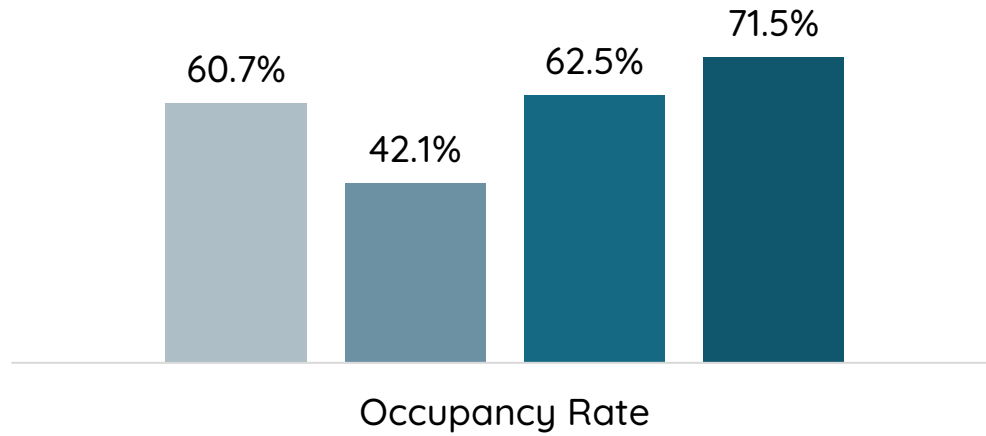


+ 9.3% from 2021

■ Nov-21 ■ Nov-22

\* Visitors staying in paid accommodations.

# NOVEMBER 2019-YEAR LODGING METRICS\*



\* Visitors staying in paid accommodations.

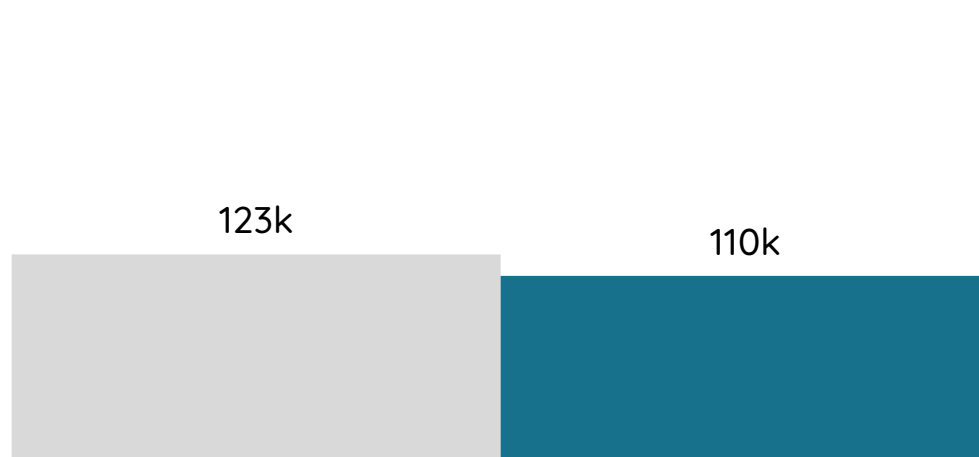
# NOVEMBER 2022 VISITATION & ROOM NIGHTS\*

## VISITORS

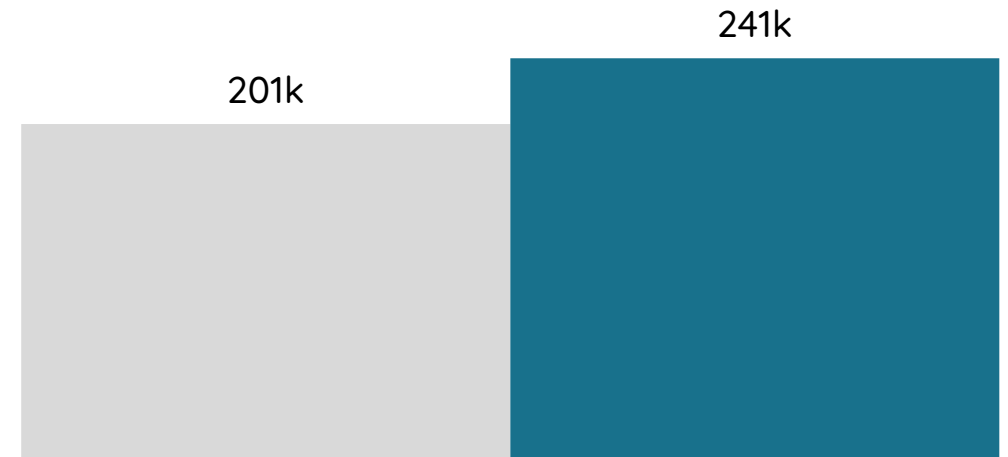
**109,500**

## ROOM NIGHTS

**241,000**



- 10.6% from 2021



+ 19.8% from 2021

■ Nov-21   ■ Nov-22

\* Visitors staying in paid accommodations.

# NOVEMBER 2022 SPENDING & ECONOMIC IMPACT\*

## DIRECT SPENDING

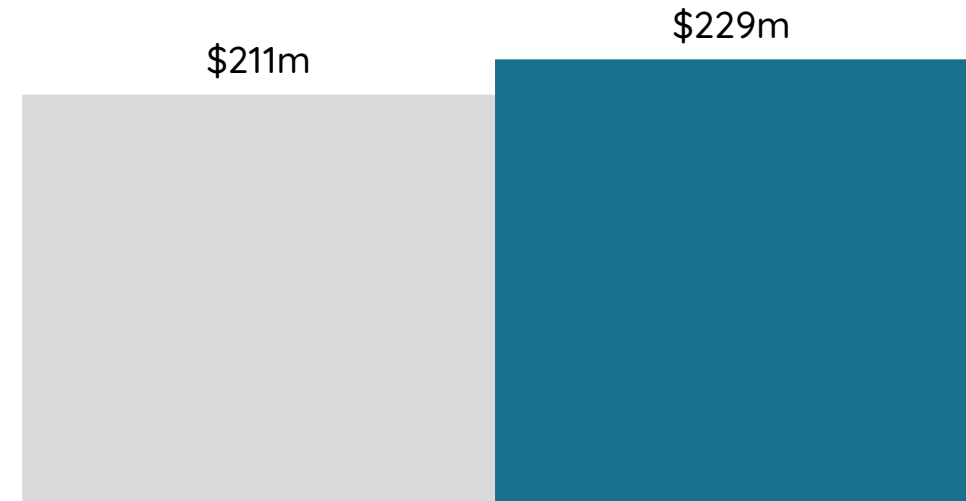
**\$153,491,800**



+ 8.7% from 2021

## ECONOMIC IMPACT

**\$228,856,300**



+ 8.7% from 2021

■ Nov-21 ■ Nov-22

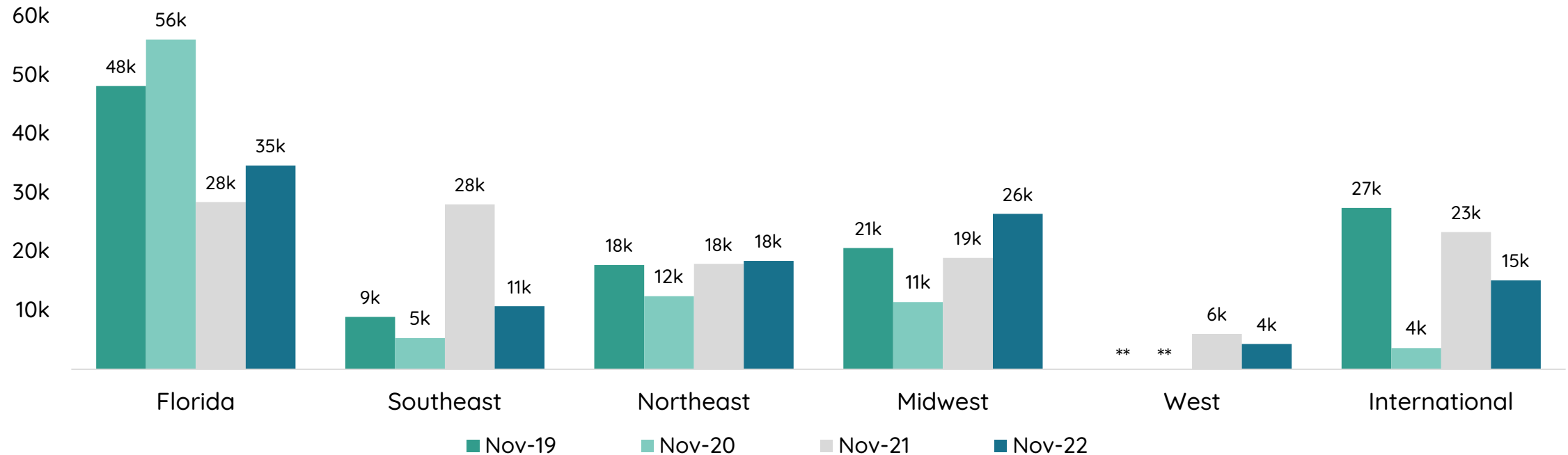
\* Visitors staying in paid accommodations.

## FLORIDA VISITORS

**34,600**

## OUT-OF-STATE VISITORS

**74,900**



\* Visitors staying in paid accommodations.  
\*\* Visitation from western U.S. states not separated from "other" category in November 2019 and 2020.



# CUMULATIVE VISITATION & ROOM NIGHTS\*

## CYTD VISITORS

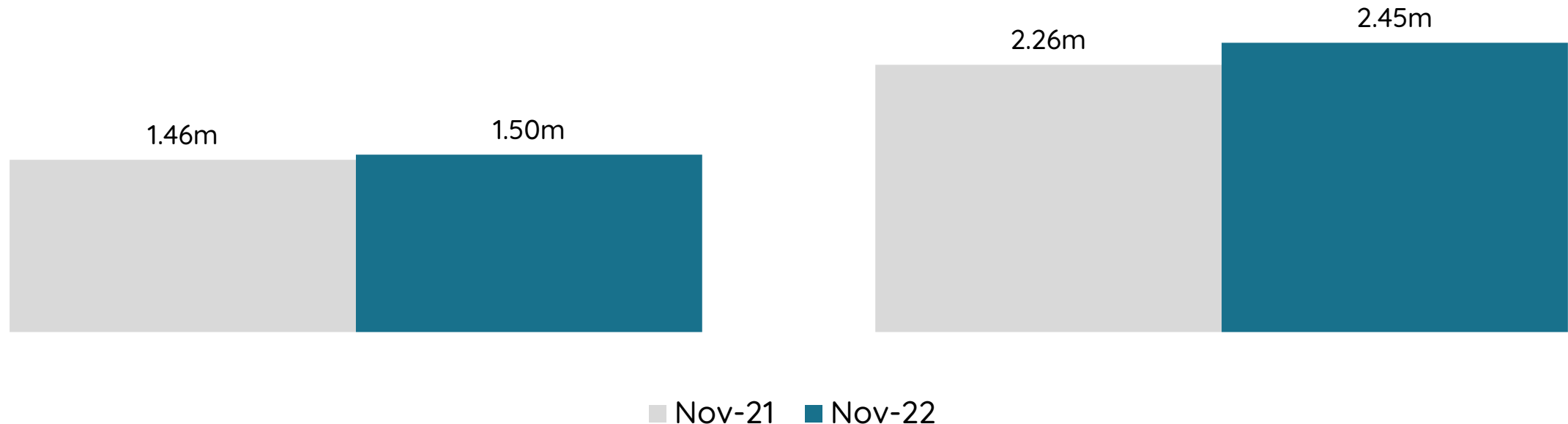
**1,503,400**

+ 3.0% from 2021

## CYTD ROOM NIGHTS

**2,451,800**

+ 8.3% from 2021



\* Visitors staying in paid accommodations.

# CUMULATIVE SPENDING & ECONOMIC IMPACT\*

## CYTD DIRECT SPENDING

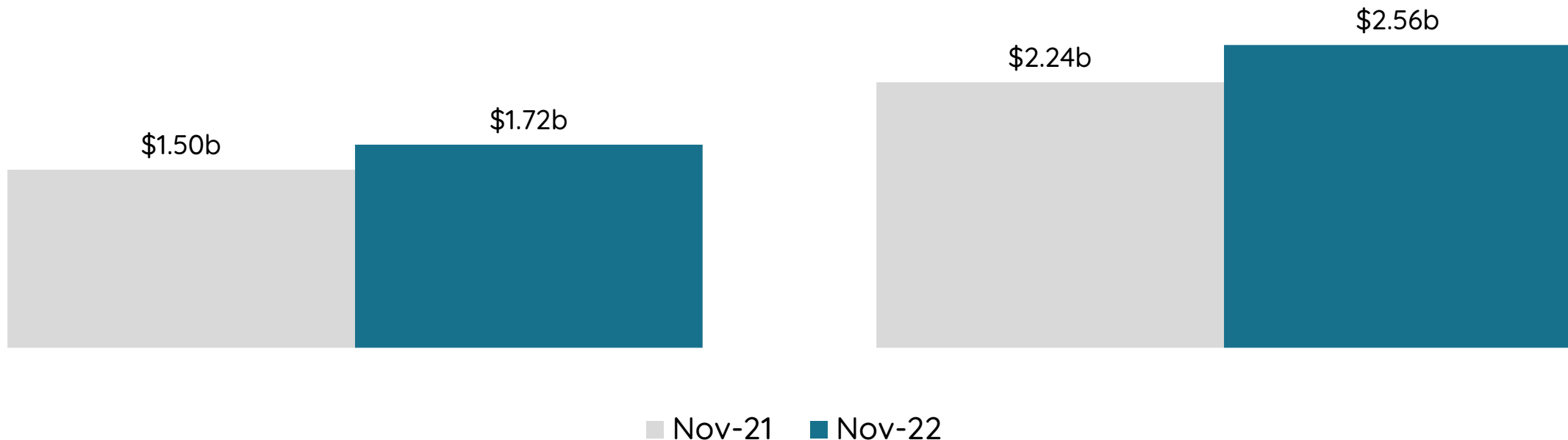
**\$1,715,490,600**

+ 14.0% from 2021

## CYTD ECONOMIC IMPACT

**\$2,557,796,600**

+ 14.0% from 2021

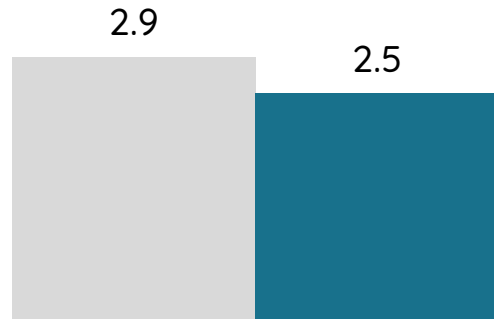


\* Visitors staying in paid accommodations.

# TRIP CHARACTERISTICS\*

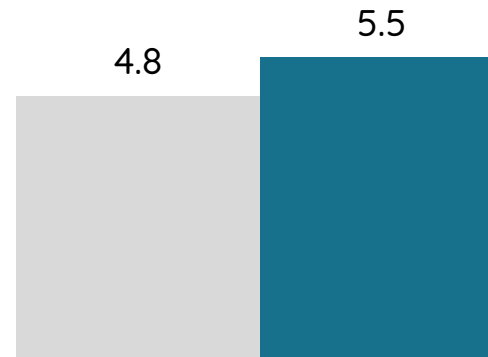
## TRAVEL PARTY SIZE

2.5



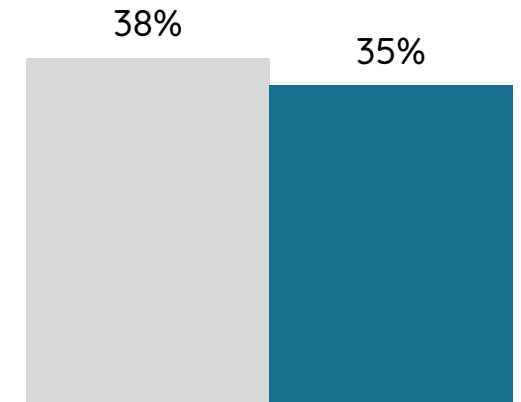
## NIGHTS STAYED

5.5



## 1ST TIME VISITORS

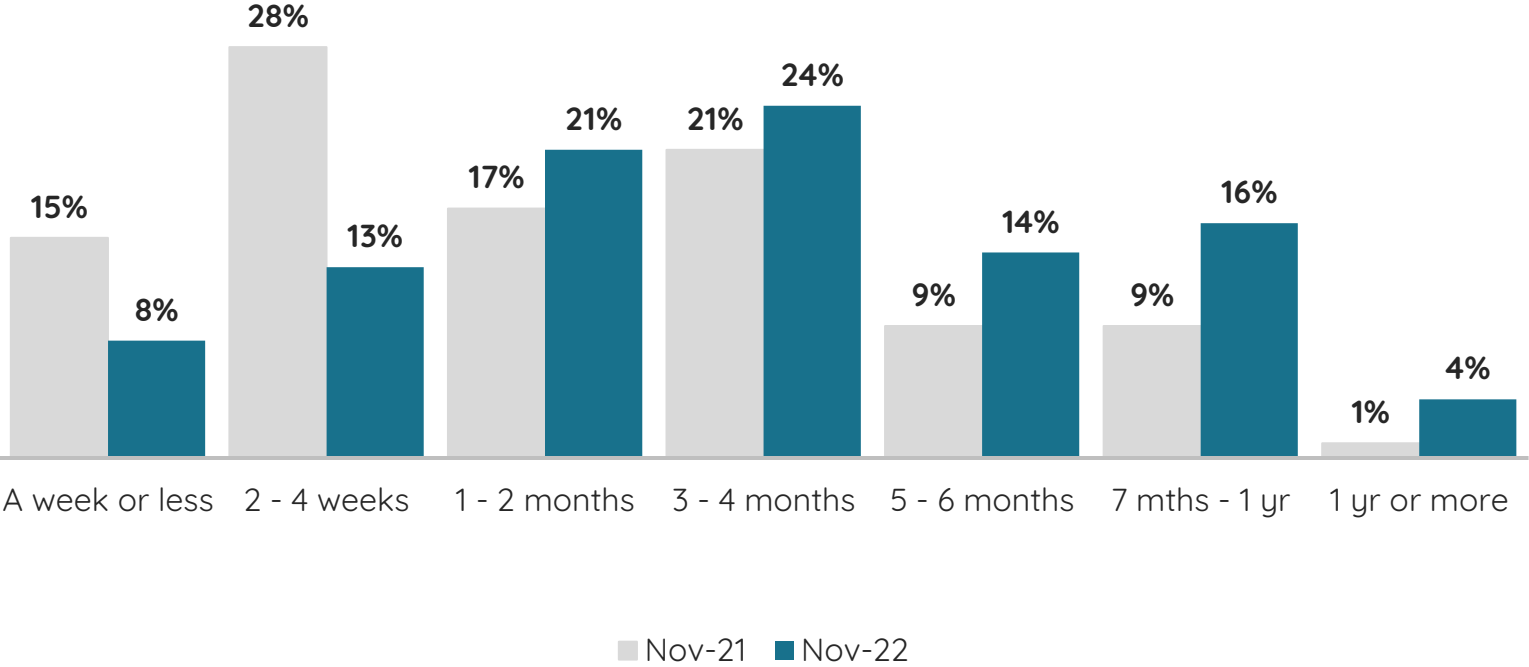
35%



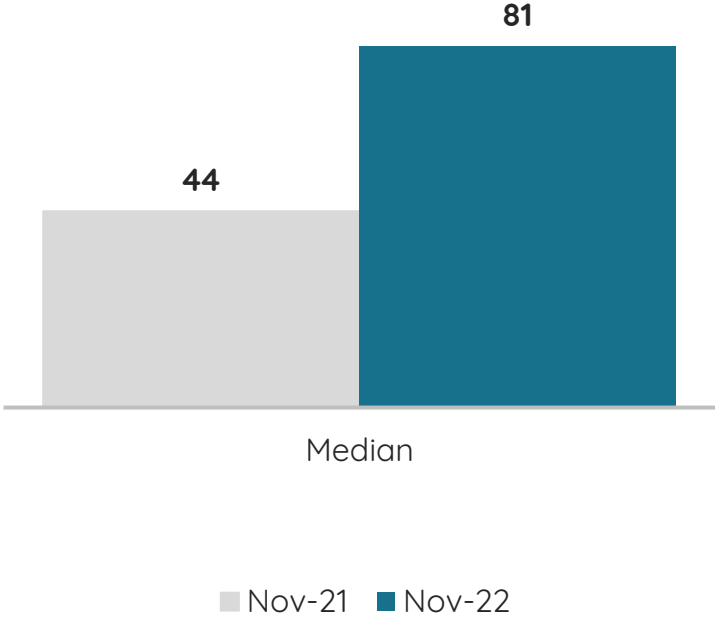
■ Nov-21 ■ Nov-22

\* Visitors staying in paid accommodations.

## PLANNING WINDOWS

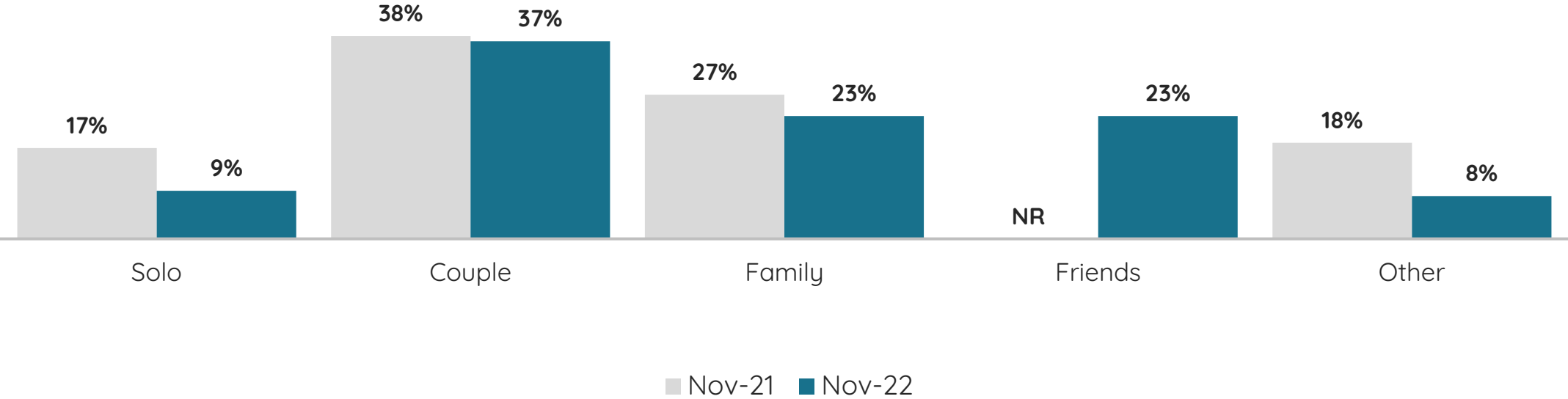


## MEDIAN PLANNING DAYS



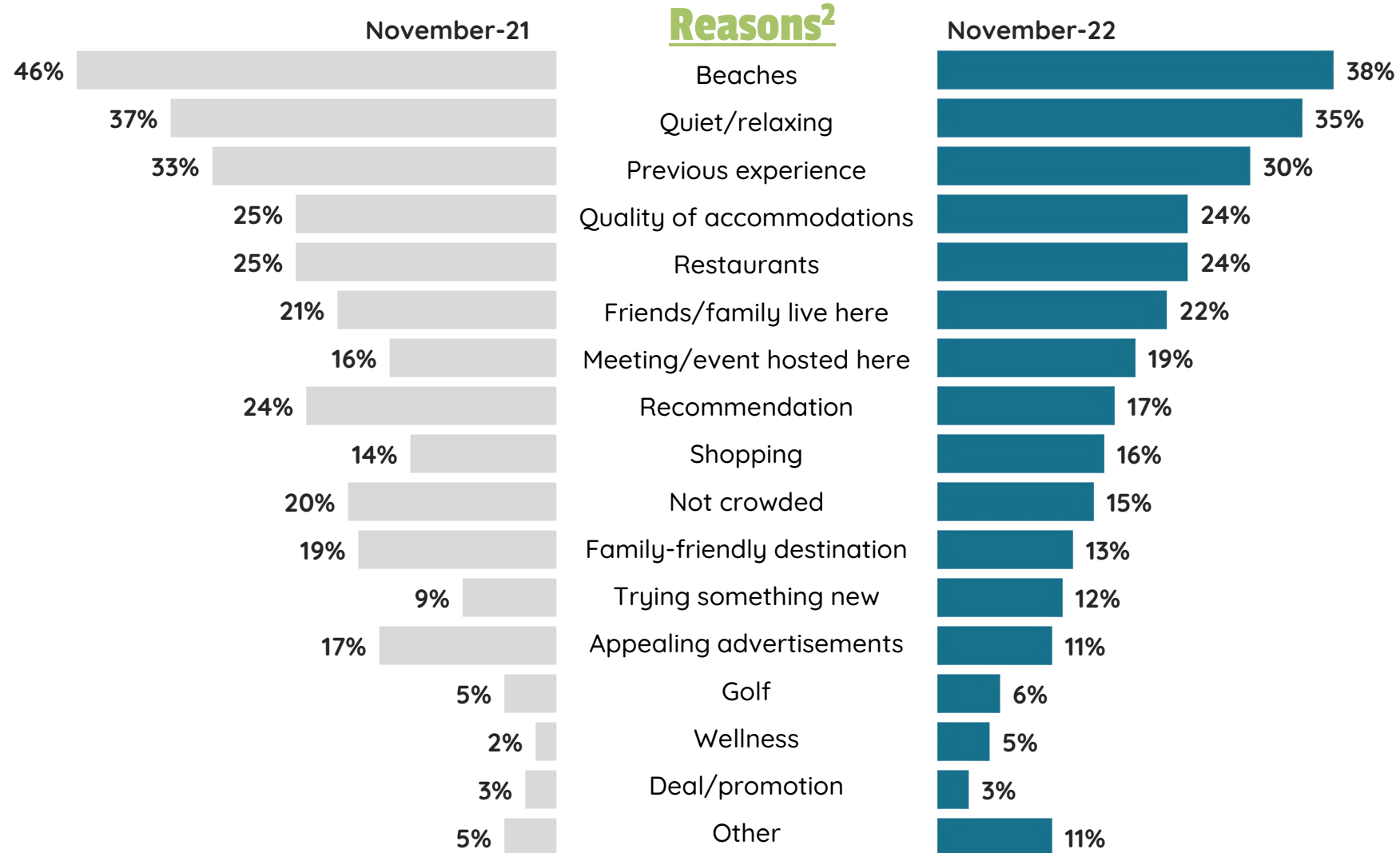
\* Visitors staying in paid accommodations.

## TRAVEL PARTY COMPOSITION



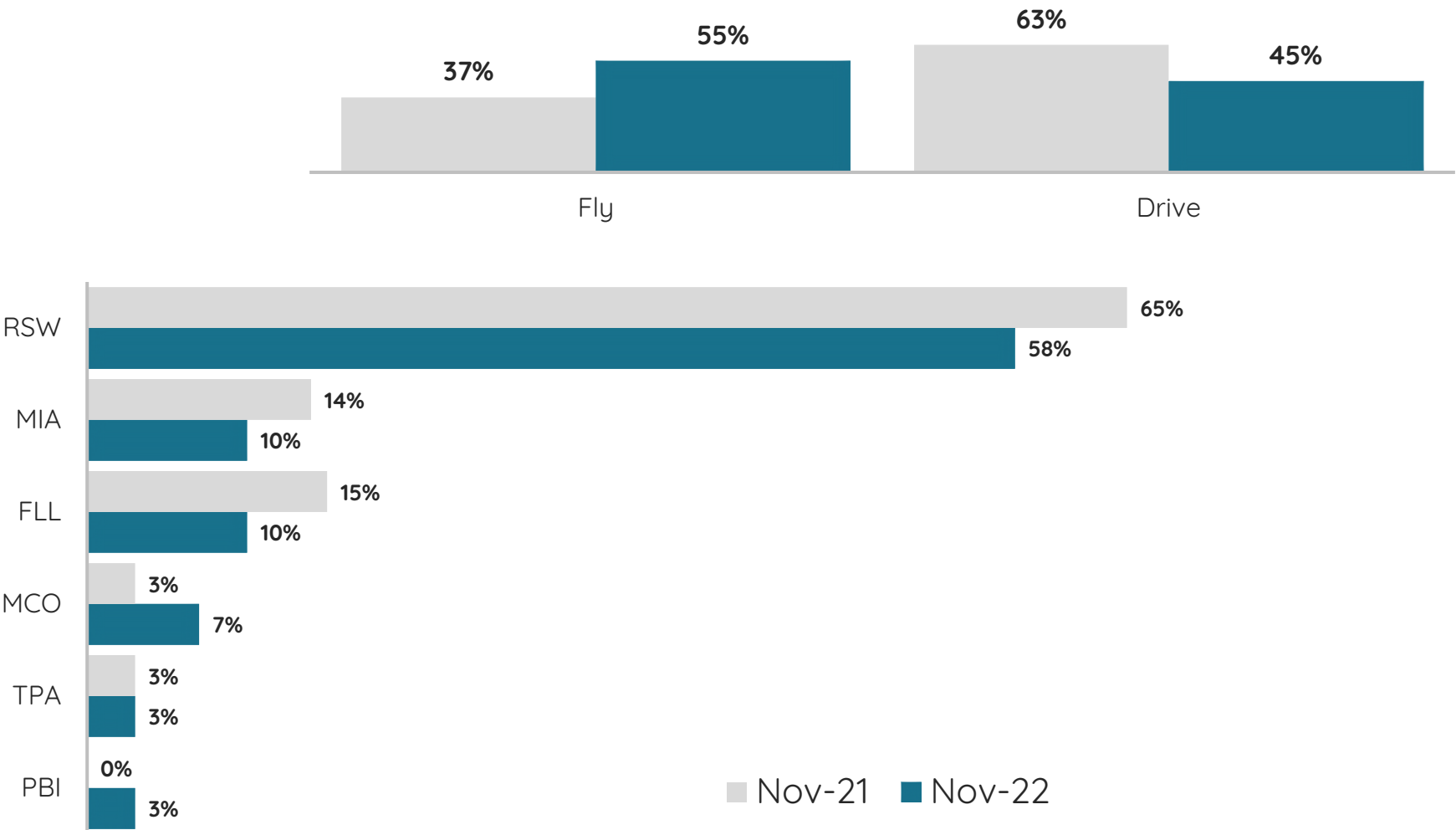
\* Visitors staying in paid accommodations.

# REASONS FOR CHOOSING AREA<sup>1</sup>



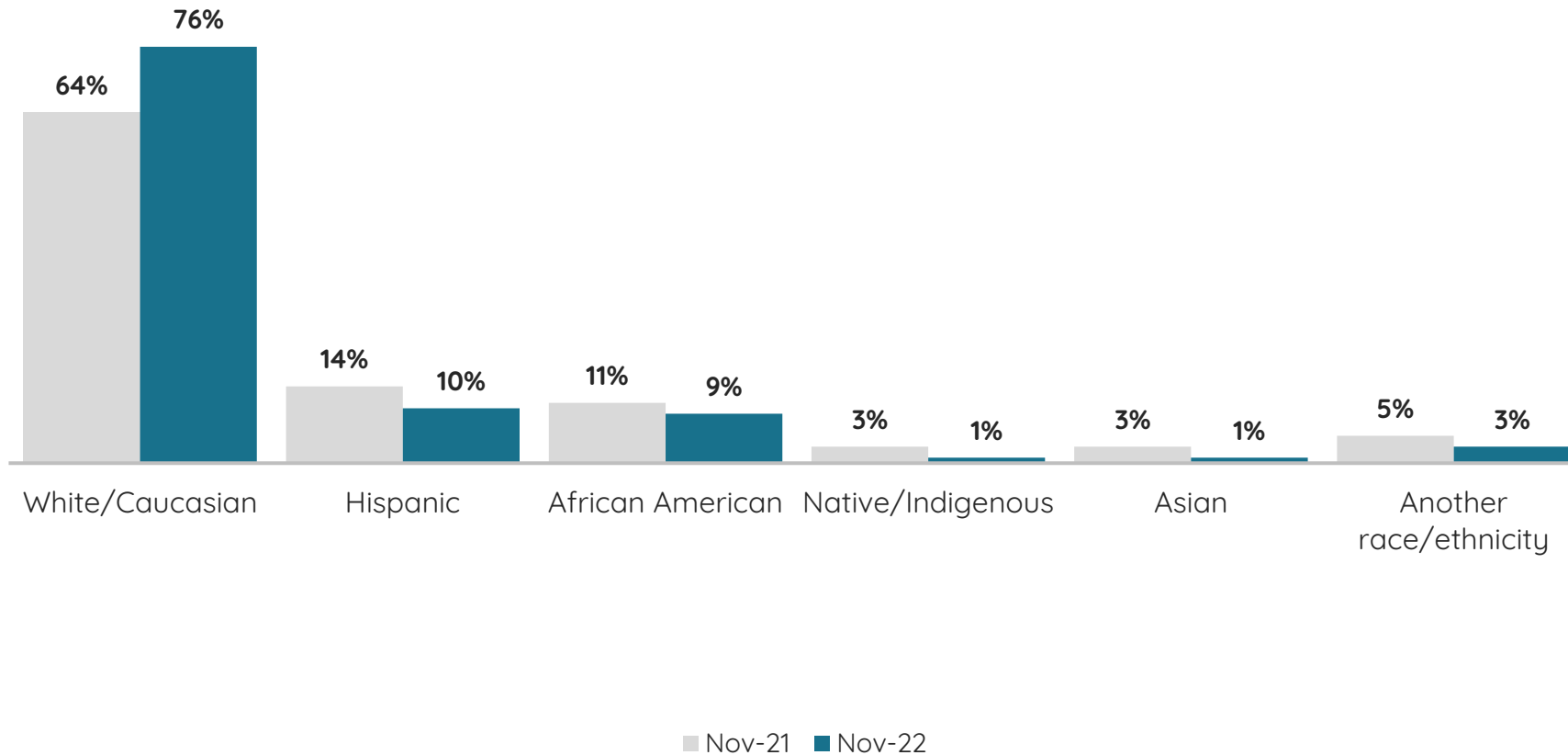
<sup>1</sup> Visitors staying in paid accommodations.  
<sup>2</sup> Multiple responses permitted.

# TRANSPORTATION METHODS\*



\* Visitors staying in paid accommodations.

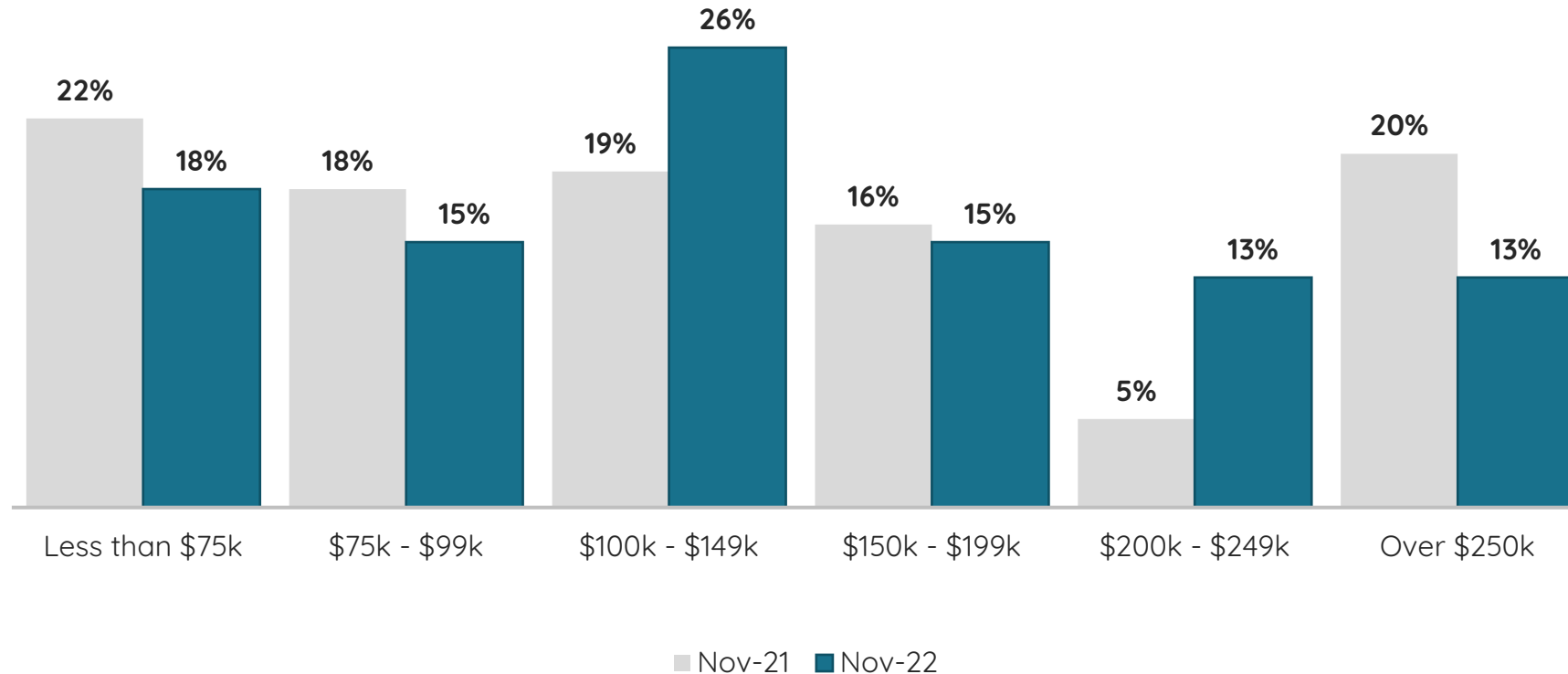
## Race/Ethnicity



\* Visitors staying in paid accommodations.

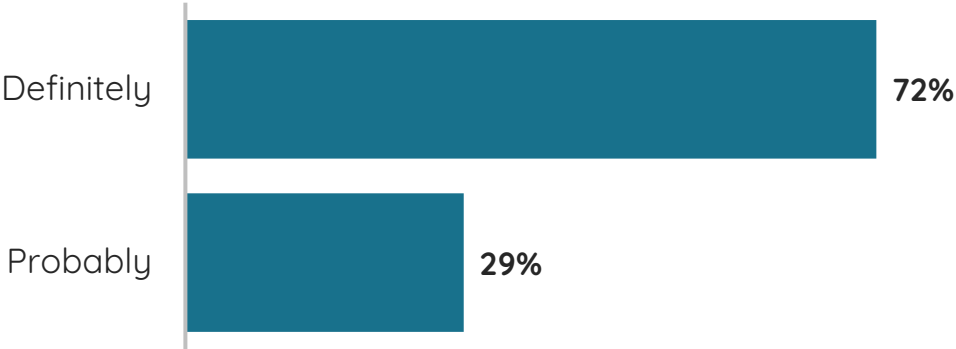


## Annual Household Income

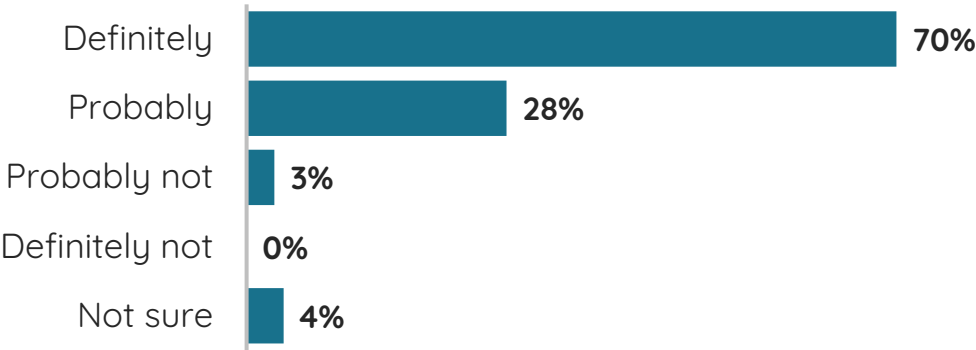


\* Visitors staying in paid accommodations.

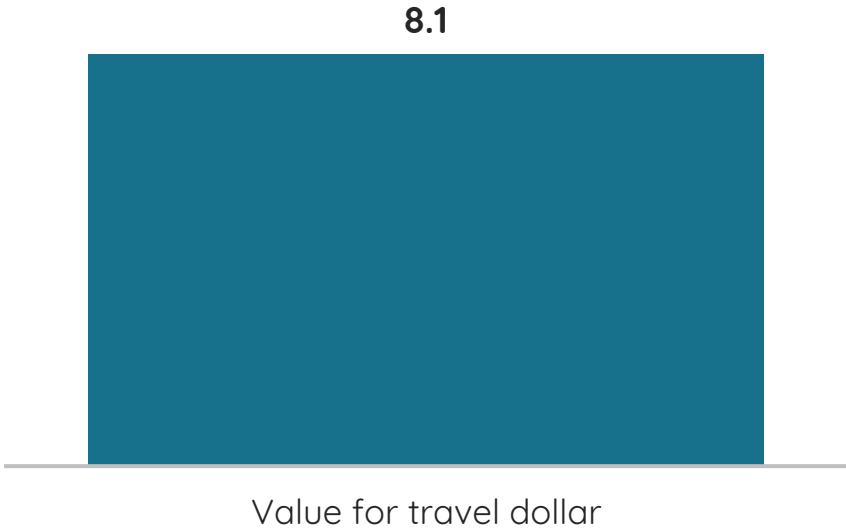
## WOULD RECOMMEND THE AREA?



## 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.

# NOVEMBER 2022 METRICS

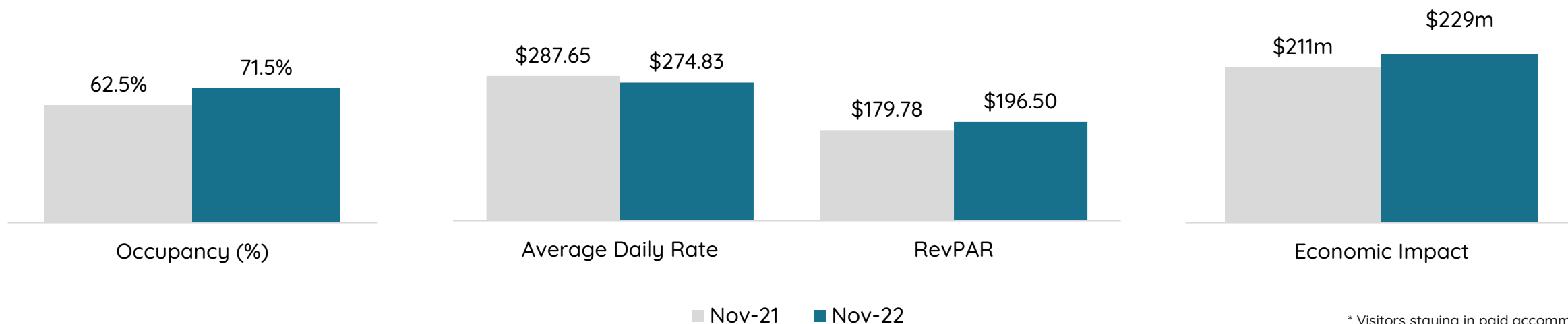


# NOVEMBER 2022 OVERNIGHT VISITATION & LODGING\*

	NOVEMBER 2021	NOVEMBER 2022	% Change from 2021
Occupancy Rate	62.5%	71.5%	+ 14.4%
Average Daily Rate	\$287.65	\$274.83	- 4.5%
RevPAR	\$179.78	\$196.50	+ 9.3%

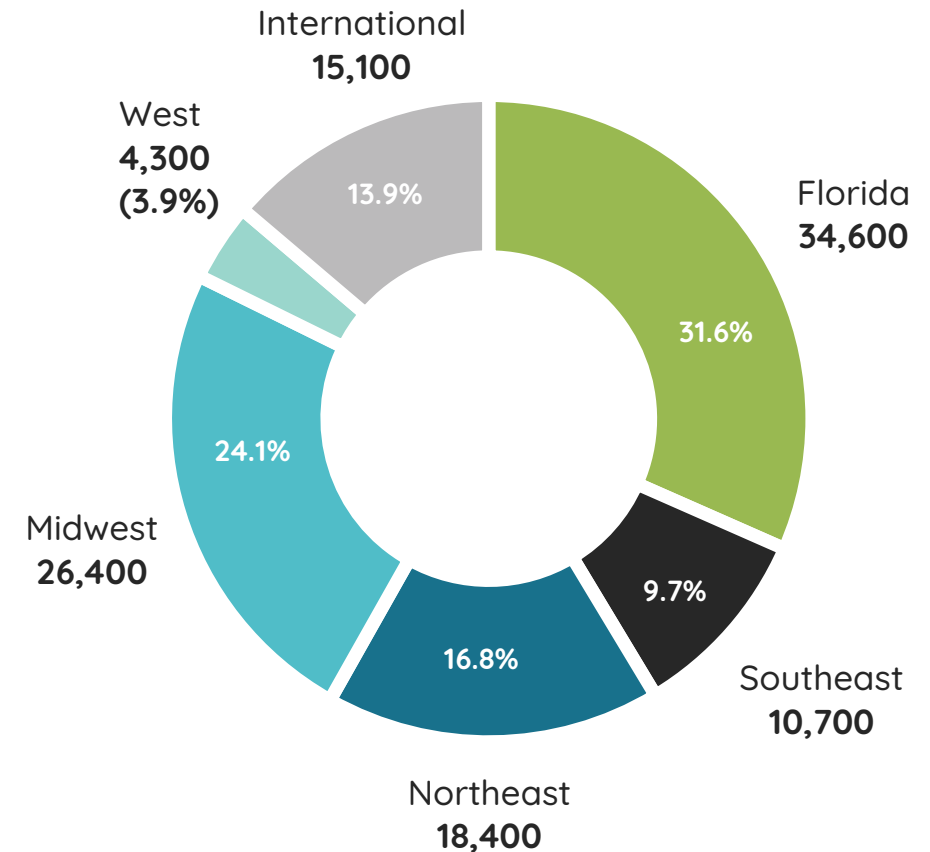
	NOVEMBER 2021	NOVEMBER 2022	% Change from 2021
Visitors	122,500	109,500	- 10.6%
Room Nights	201,200	241,000	+ 19.8%
Direct Spending	\$141,202,500	\$153,491,800	+ 8.7%
Economic Impact	\$210,532,900	\$228,856,300	+ 8.7%



\* Visitors staying in paid accommodations.

# NOVEMBER 2022 OVERNIGHT VISITOR ORIGIN MARKETS\*

Region	November 2021		November 2022		Percent Change (Δ%)	
	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	28,400	23.2%	34,600	31.6%	+ 21.8%	+ 36.2%
Southeast	28,000	22.9%	10,700	9.7%	- 61.8%	- 57.4%
Northeast	17,900	14.6%	18,400	16.8%	+ 2.8%	+ 14.9%
Midwest	18,900	15.5%	26,400	24.1%	+ 39.7%	+ 55.9%
West	6,000	4.9%	4,300	3.9%	- 28.3%	- 19.4%
Canada	10,100	8.3%	5,300	4.8%	- 47.5%	- 41.8%
Europe	6,200	5.1%	6,900	6.3%	+ 11.3%	+ 24.1%
C/S America	2,800	2.3%	1,400	1.3%	- 50.0%	- 42.2%
Other	4,200	3.4%	1,500	1.9%	- 64.3%	- 44.1%
<b>Total</b>	<b>122,500</b>	<b>100.0%</b>	<b>109,500</b>	<b>100.0%</b>		



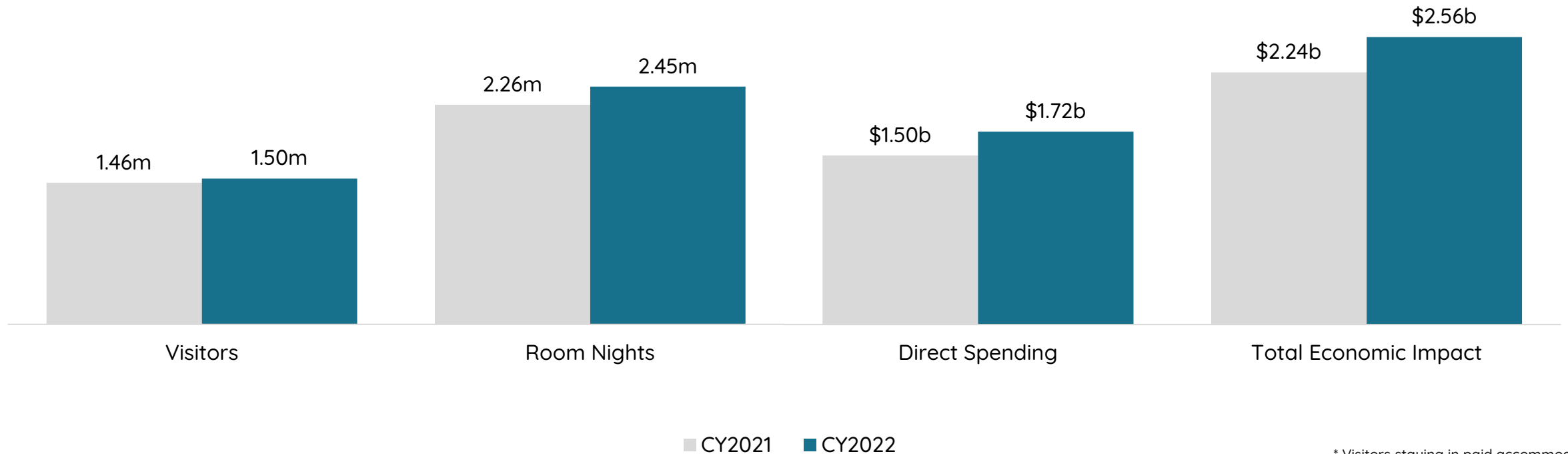
\* Visitors staying in paid accommodations.

# CALENDAR YEAR- TO-DATE METRICS



# CYTD OVERNIGHT VISITATION & LODGING\*

	CYTD 2021	CYTD 2022	% Change from 2021
Visitors	1,460,000	1,503,400	+ 3.0%
Room Nights	2,264,500	2,451,800	+ 8.3%
Direct Spending	\$1,504,565,300	\$1,715,490,600	+ 14.0%
Economic Impact	\$2,243,306,900	\$2,557,796,600	+ 14.0%

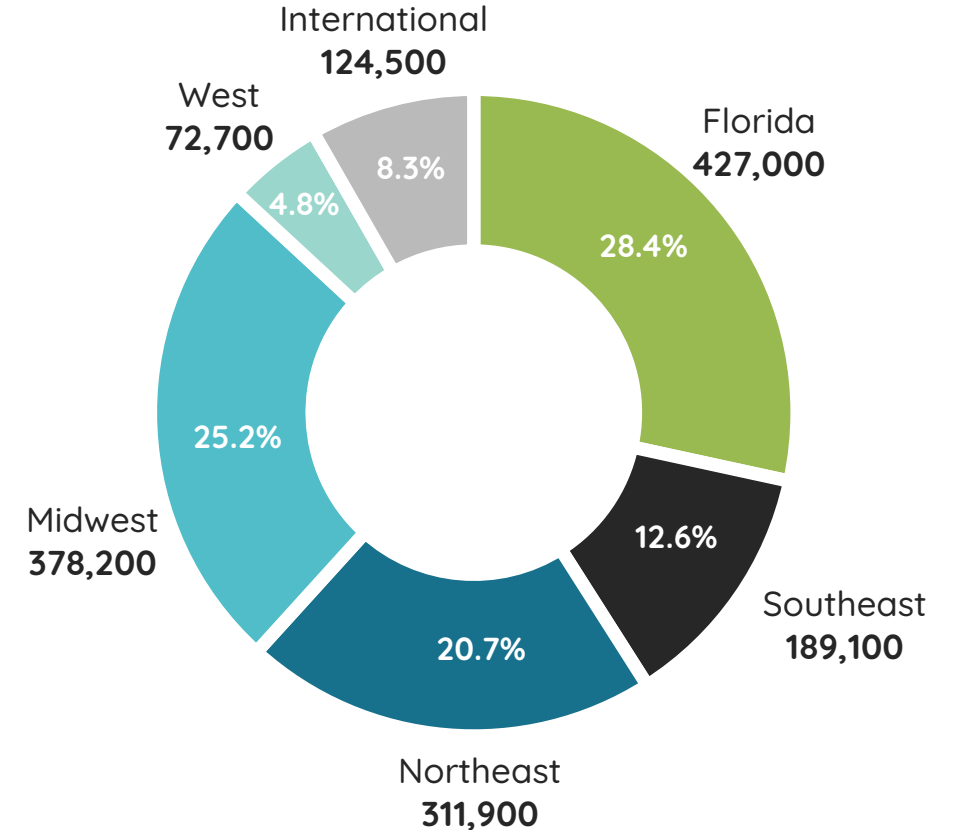


\* Visitors staying in paid accommodations.



# CYTD OVERNIGHT VISITOR ORIGIN MARKETS\*

Region	CY2021		CY2022		Percent Change (Δ%)	
	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	652,000	44.6%	427,000	28.4%	- 34.5%	- 36.3%
Southeast	163,900	11.2%	189,100	12.6%	+ 15.4%	+ 12.5%
Northeast	271,500	18.6%	311,900	20.7%	+ 14.9%	+ 11.3%
Midwest	278,900	19.1%	378,200	25.2%	+ 35.6%	+ 31.9%
West	39,500	2.7%	72,700	4.8%	+ 84.1%	+ 77.8%
Canada	16,800	1.2%	38,100	2.5%	+ 126.8%	+ 108.3%
Europe	20,100	1.4%	54,000	3.6%	+ 168.7%	+ 157.1%
C/S America	13,100	0.9%	15,000	1.0%	+ 14.5%	+ 11.1%
Other	4,200	0.3%	17,400	1.2%	+ 314.3%	+ 300.0%
Total	1,460,000	100.0%	1,503,400	100.0%		



\* Visitors staying in paid accommodations.

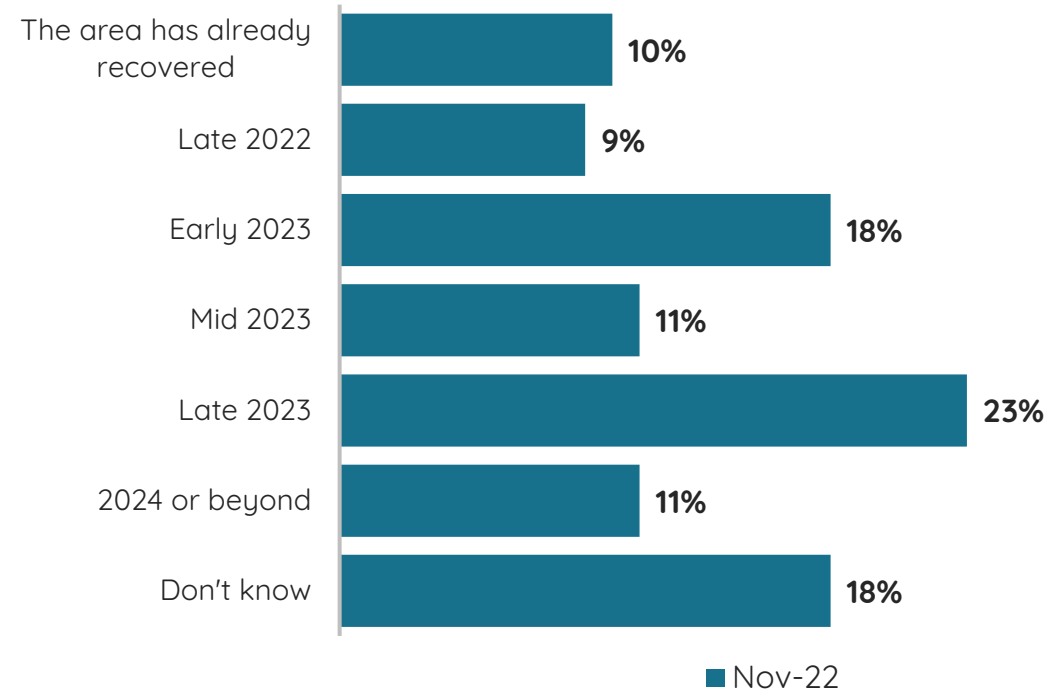


# NOVEMBER 2022 VISITOR PROFILE

OF OVERNIGHT VISITORS



Hurricane Recovery			
	Nov-21	Nov-22	Trend
The area has already recovered	-	10%	-
Late 2022	-	9%	-
Early 2023	-	18%	-
Mid 2023	-	11%	-
Late 2023	-	23%	-
2024 or beyond	-	11%	-
Don't know	-	18%	-

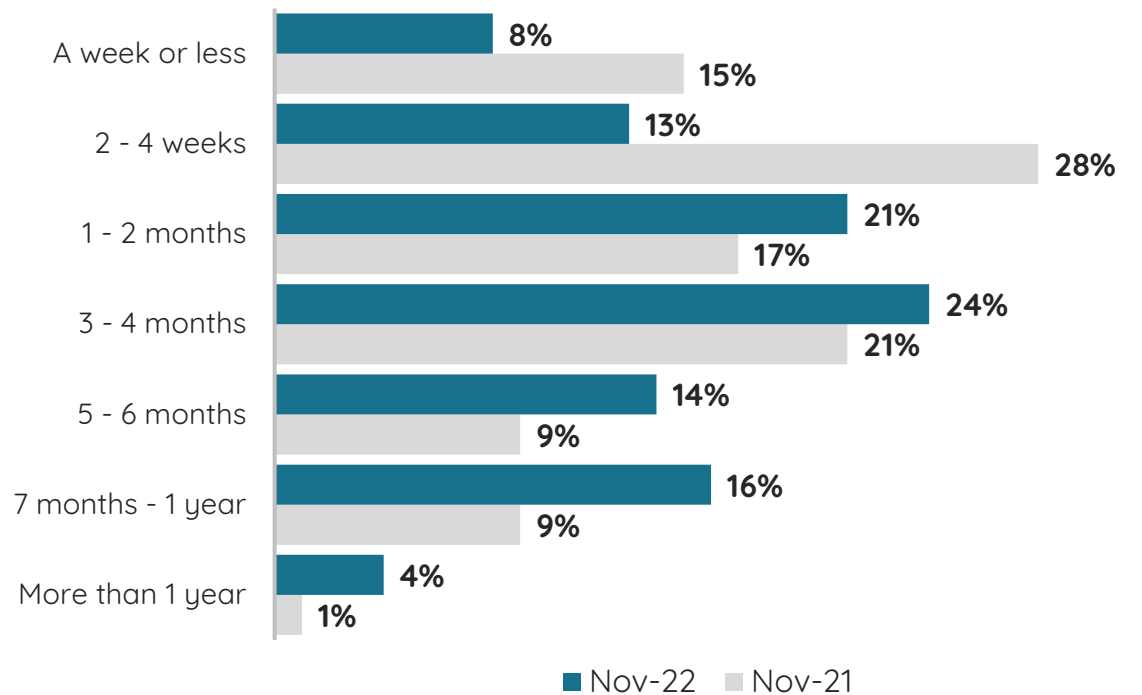


\* Visitors staying in paid accommodations.  
“When do you think Florida’s Paradise Coast will recover enough to make a trip to the area feel back to normal?”

# TRIP PLANNING CYCLE\*

Trip Planning Cycle			
	Nov-21	Nov-22	Trend
A week or less	15%	8%	↓
2 - 4 weeks	28%	13%	↓
1 - 2 months	17%	21%	↑
3 - 4 months	21%	24%	↑
5 - 6 months	9%	14%	↑
7 months - 1 year	9%	16%	↑
More than 1 year	1%	4%	↑
Median (days)	44	81	↑

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

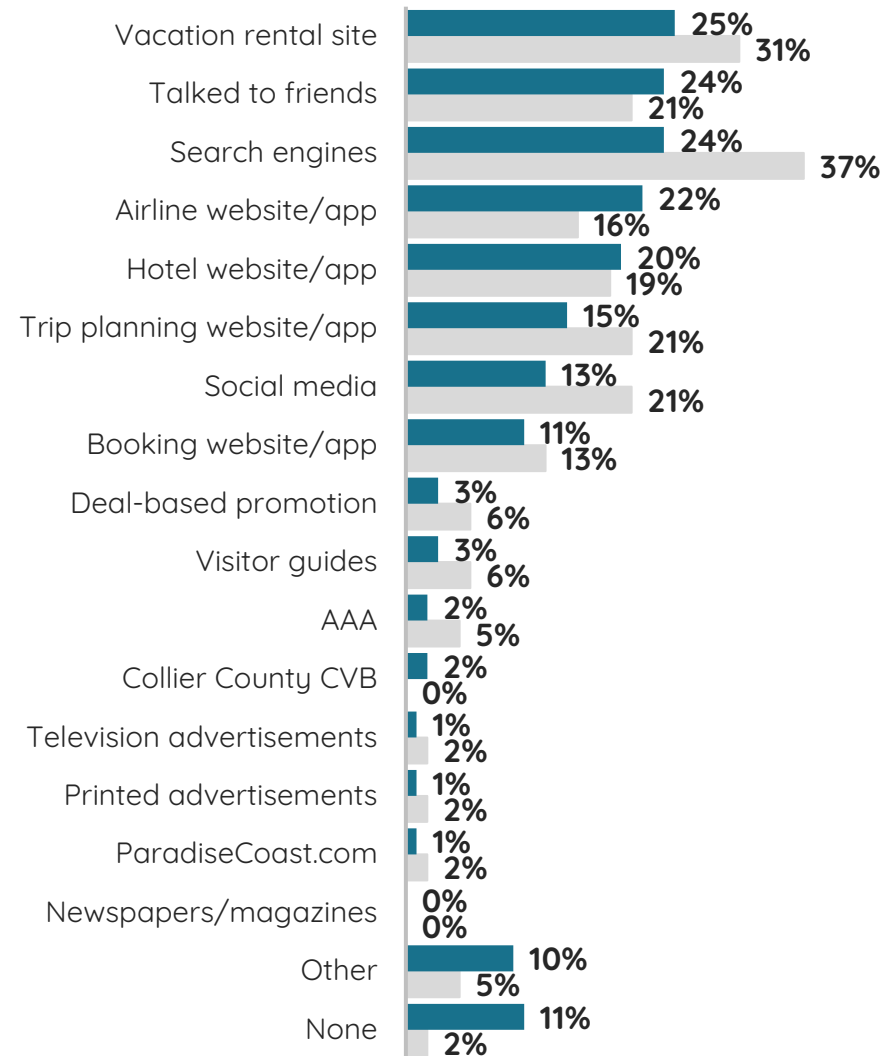


\* Visitors staying in paid accommodations.

# TRIP PLANNING RESOURCES\*

Top Trip Planning Resources <sup>1</sup>			
	Nov-21	Nov-22	Trend
Vacation rental site	31%	25%	↓
Search engines	37%	24%	↓
Talked to friends	21%	24%	↑
Airline website/app	16%	22%	↑
Hotel website/app	19%	20%	↑
Trip planning website/app	21%	15%	↓
Social media	21%	13%	↓
Booking website/app	13%	11%	↓
Visitor guides	6%	3%	↓
Deal-based promotion	6%	3%	↓
Collier County CVB	0%	2%	-
AAA	5%	2%	↓
ParadiseCoast.com	2%	1%	↓
Printed advertisements	2%	1%	↓
Television advertisements	2%	1%	↓
Newspapers/magazines	0%	0%	-
Other	5%	10%	↑
None	2%	11%	↑

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



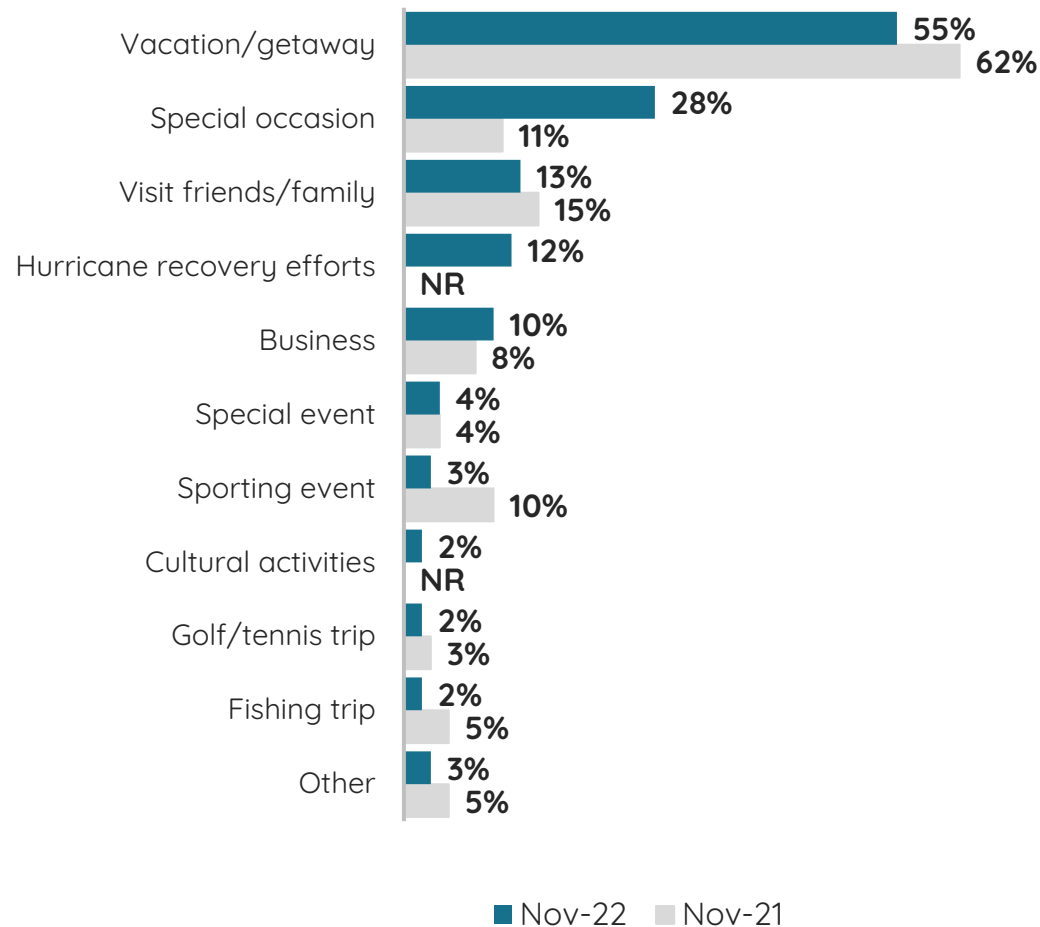
■ Nov-22 ■ Nov-21

\* Visitors staying in paid accommodations.

# REASONS FOR VISITING\*

Top Reasons for Visiting <sup>1</sup>			
	Nov-21	Nov-22	Trend
Vacation/getaway	62%	55%	↓
Special occasion	11%	28%	↑
Visit friends/family	15%	13%	↓
Hurricane recovery efforts	-	12%	-
Business	8%	10%	↑
Special event	4%	4%	-
Sporting event	10%	3%	↓
Fishing trip	5%	2%	↓
Golf/tennis trip	3%	2%	↓
Cultural activities	-	2%	-
Other	5%	3%	↓

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

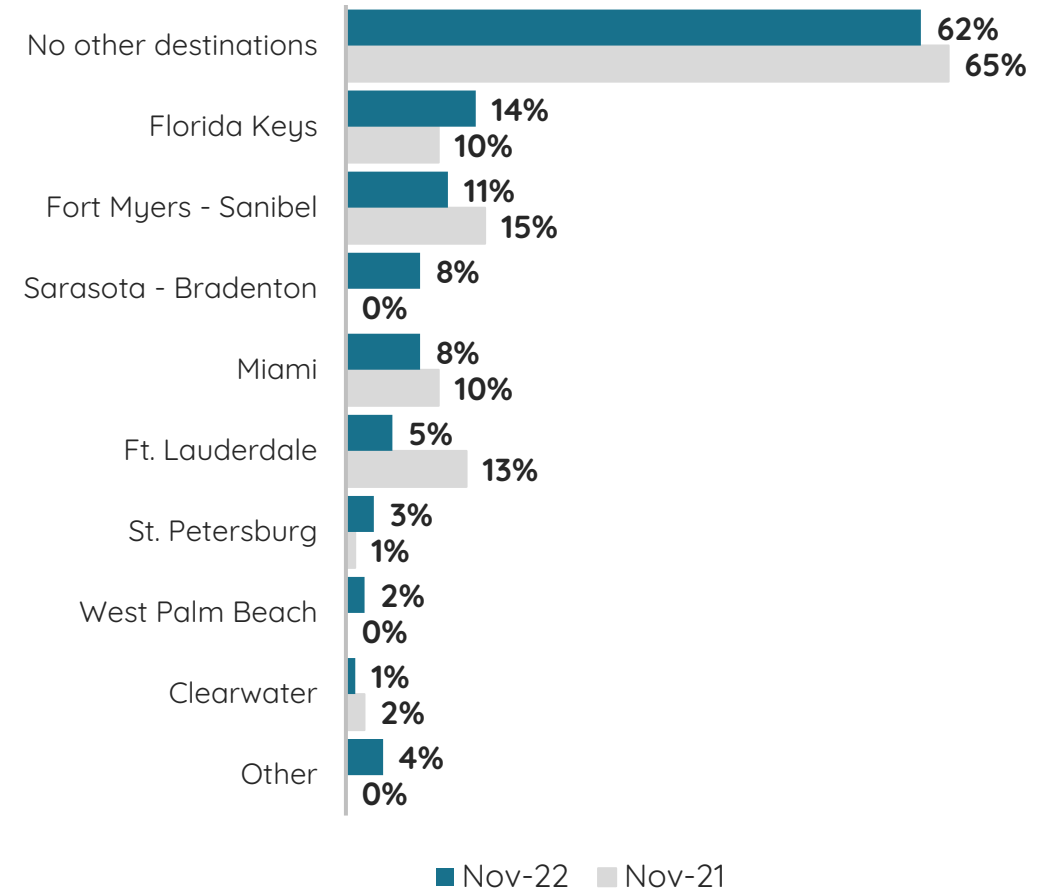


\* Visitors staying in paid accommodations.

# OTHER DESTINATIONS CONSIDERED\*

Other Destinations Considered <sup>1</sup>			
	Nov-21	Nov-22	Trend
No other destinations	65%	62%	↓
Florida Keys	10%	14%	↑
Fort Myers - Sanibel	15%	11%	↓
Miami	10%	8%	↓
Sarasota - Bradenton	0%	8%	↑
Ft. Lauderdale	13%	5%	↓
St. Petersburg	1%	3%	↑
West Palm Beach	0%	2%	↑
Clearwater	2%	1%	↓
Other	0%	4%	↑

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

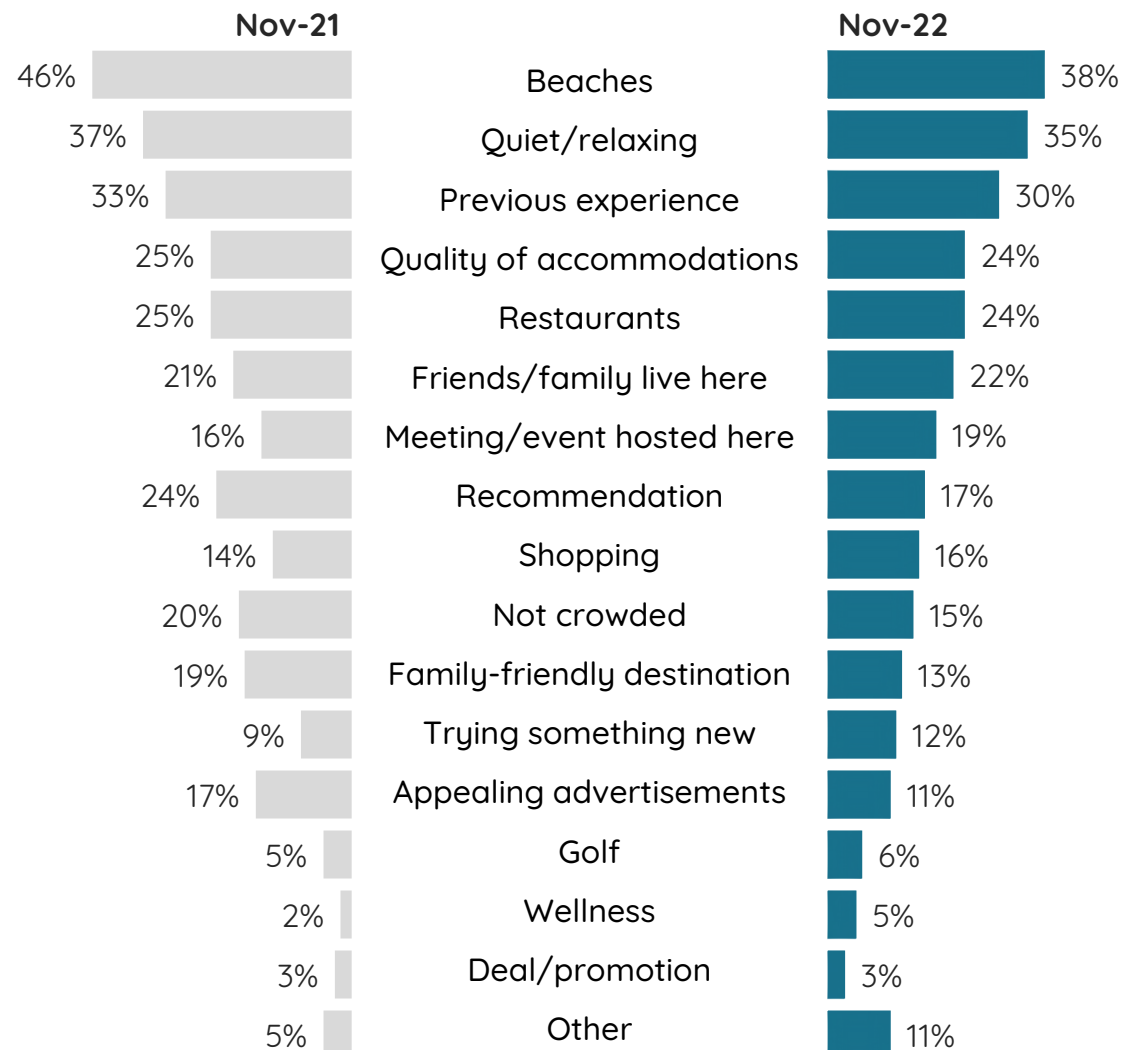


\* Visitors staying in paid accommodations.

# REASONS FOR CHOOSING AREA\*

Reasons for Choosing Area <sup>1</sup>			
	Nov-21	Nov-22	Trend
Beaches	46%	38%	↓
Quiet/relaxing	37%	35%	↓
Previous experience	33%	30%	↓
Quality of accommodations	25%	24%	↓
Restaurants	25%	24%	↓
Friends/family live here	21%	22%	↑
Meeting/event hosted here	16%	19%	↑
Recommendation	24%	17%	↓
Shopping	14%	16%	↑
Not crowded	20%	15%	↓
Family-friendly destination	19%	13%	↓
Trying something new	9%	12%	↑
Appealing advertisements	17%	11%	↓
Golf	5%	6%	↑
Wellness	2%	5%	↑
Deal/promotion	3%	3%	-
Other	5%	11%	↑

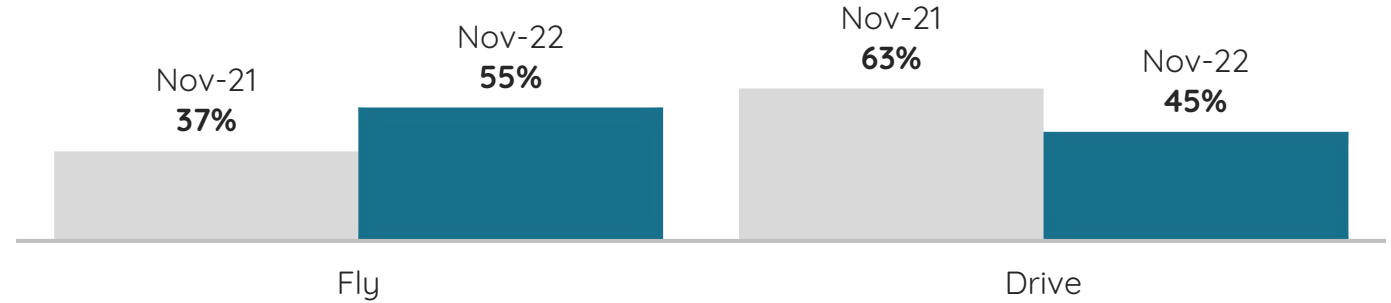
<sup>1</sup> Multiple responses permitted.



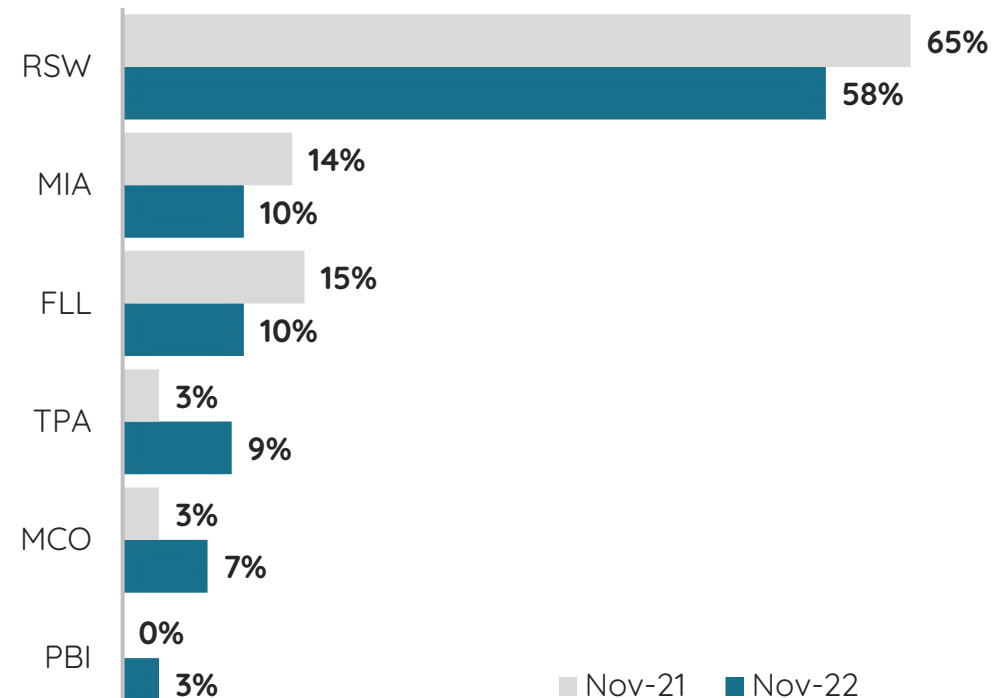
\* Visitors staying in paid accommodations.

# TRANSPORTATION METHODS\*

Mode of Transportation			
	Nov-21	Nov-22	Trend
Fly	37%	55%	↑
Drive	63%	45%	↓



Airport Deplaned (Base: Fly)			
	Nov-21	Nov-22	Trend
SWFL Intl Airport (RSW)	65%	58%	↓
Miami Intl Airport (MIA)	14%	10%	↓
Ft. Lauderdale Intl Airport (FLL)	15%	10%	↓
Tampa Intl Airport (TPA)	3%	9%	↑
Orlando Intl Airport (MCO)	3%	7%	↑
Palm Beach Intl (PBI)	0%	3%	↑
Naples Airport (APF)	0%	0%	-
Punta Gorda Airport (PGD)	0%	0%	-
Other	0%	0%	-



\* Visitors staying in paid accommodations.

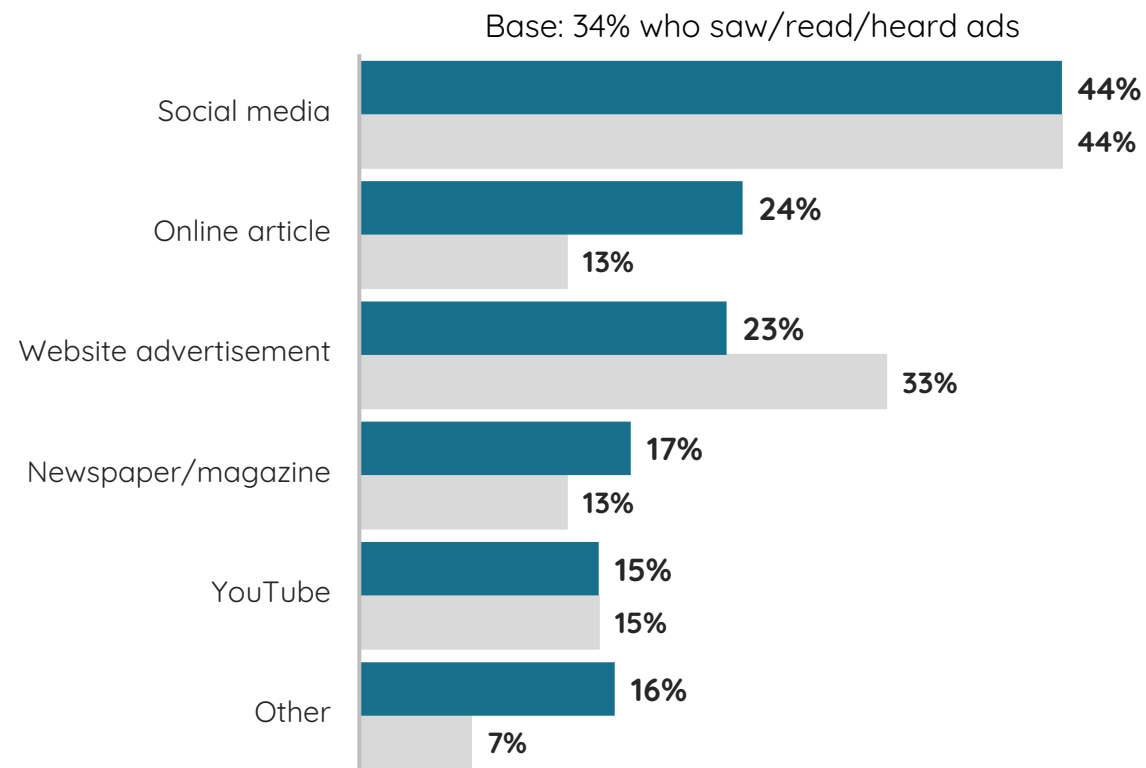
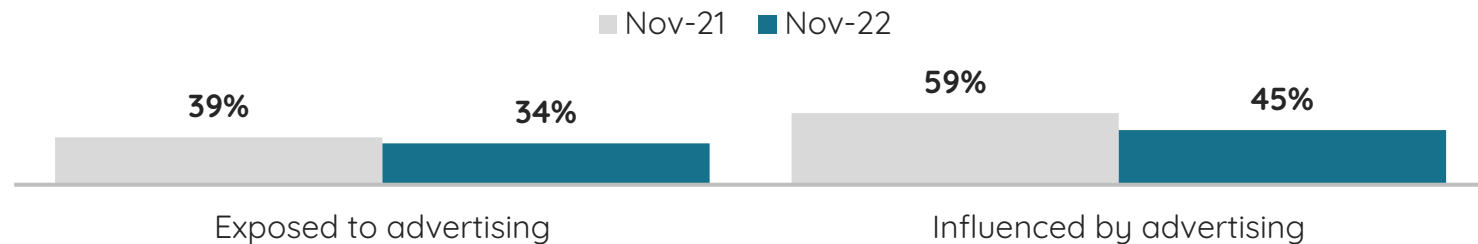


# EXPOSURE TO ADVERTISING\*

Advertising Exposure & Influence			
	Nov-21	Nov-22	Trend
Exposed to advertising	39%	34%	↓
Influenced by advertising	59%	45%	↓

Top Advertising Sources Noticed <sup>1</sup>			
	Nov-21	Nov-22	Trend
Social media	44%	44%	-
Online article	13%	24%	↑
Website advertisement	33%	23%	↓
Newspaper/magazine	13%	17%	↑
YouTube	15%	15%	-
Other	7%	16%	↑

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



\* Visitors staying in paid accommodations.

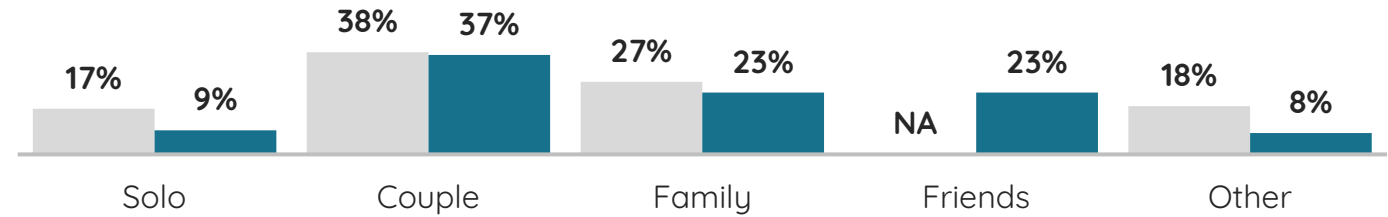
## Average Visitors per Travel Party

	Nov-21	Nov-22	Trend
Average travel party size	2.9	2.5	-



## Travel Party Composition

	Nov-21	Nov-22	Trend
Solo	17%	9%	↓
Couple	38%	37%	↓
Family	27%	23%	↓
Friends	-	23%	-
Other	18%	8%	↓



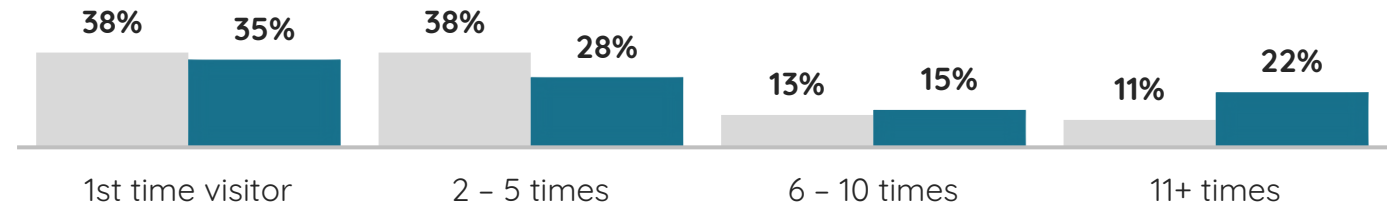
■ Nov-21 ■ Nov-22

\* Visitors staying in paid accommodations.

# VISITING PARADISE COAST\*

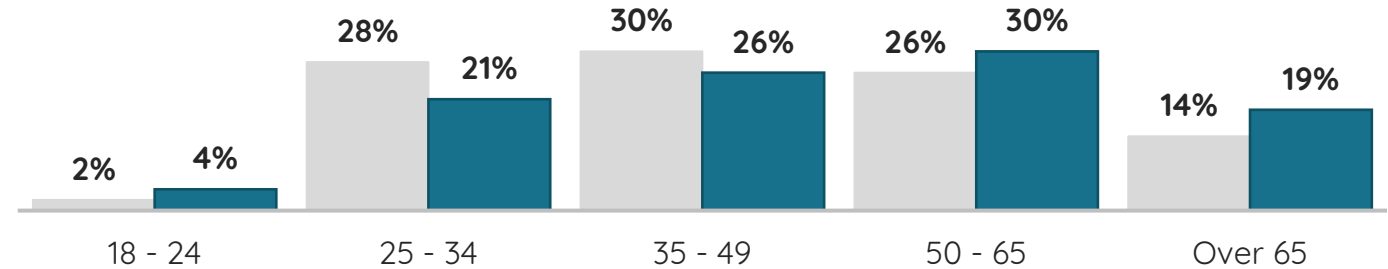
## Previous Visits

	Nov-21	Nov-22	Trend
1 <sup>st</sup> time visitor	38%	35%	↓
2 – 5 times	38%	28%	↓
6 – 10 times	13%	15%	↑
11+ times	11%	22%	↑



## Typical Visitor Ages

	Nov-21	Nov-22	Trend
Median Age	44.3	48.5	↑
Average Age	47.8	50.9	↑

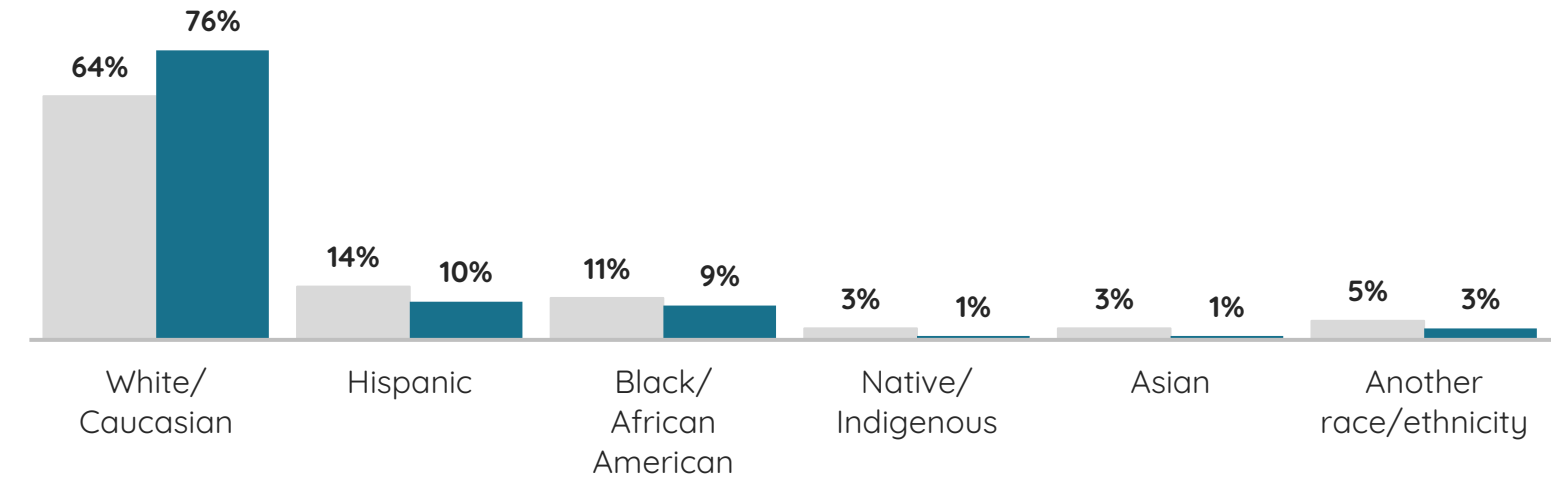


■ Nov-21 ■ Nov-22

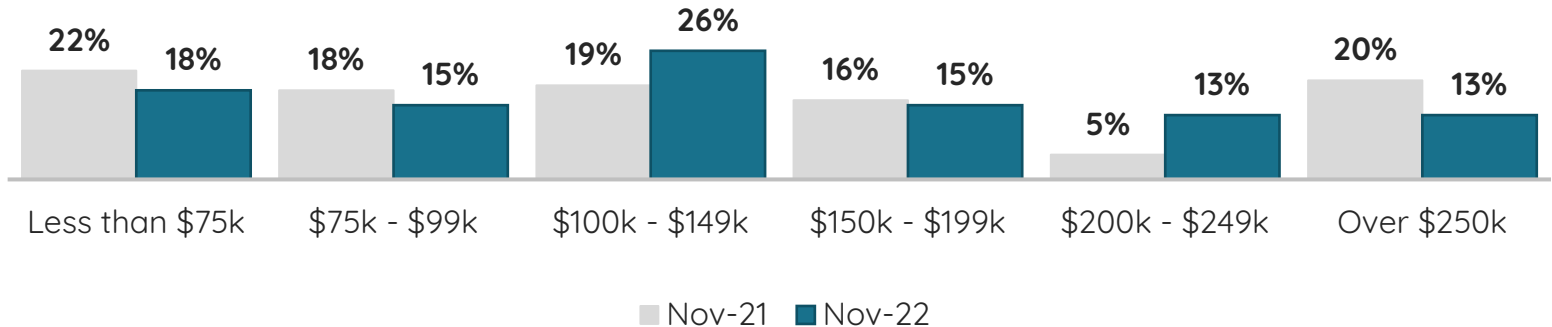
\* Visitors staying in paid accommodations.

# VISITOR DEMOGRAPHICS\*

Race/Ethnicity			
	Nov-21	Nov-22	Trend
White/Caucasian	64%	76%	↑
Hispanic	14%	10%	↓
African American	11%	9%	↓
Native/Indigenous	3%	1%	↓
Asian	3%	1%	↓
Another race/ethnicity	5%	3%	↓



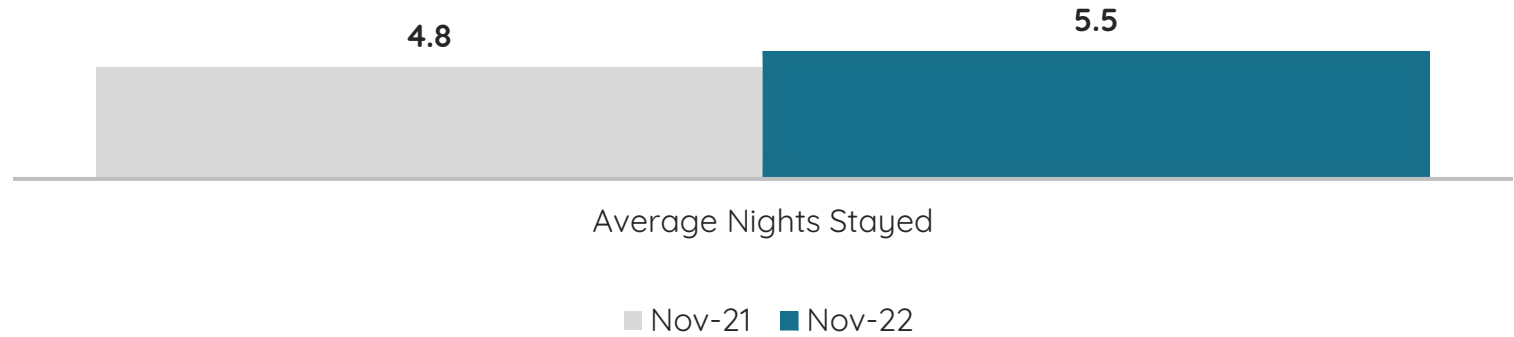
Typical Visitor Household Income			
	Nov-21	Nov-22	Trend
Median HHI	\$126,300	\$132,700	↑



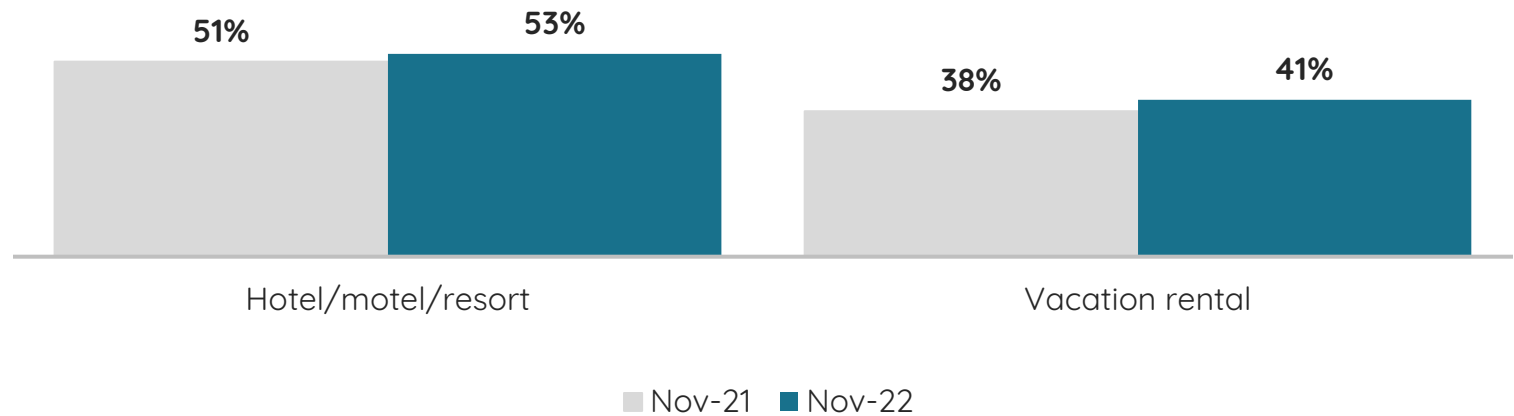
\* Visitors staying in paid accommodations.

# OVERNIGHT VISITS\*

Nights in Destination			
	Nov-21	Nov-22	Trend
Nights Stayed (mean)	4.8	5.5	↑



Accommodations			
	Nov-21	Nov-22	Trend
Hotel/motel/resort	51%	53%	↑
Vacation rental	38%	41%	↑

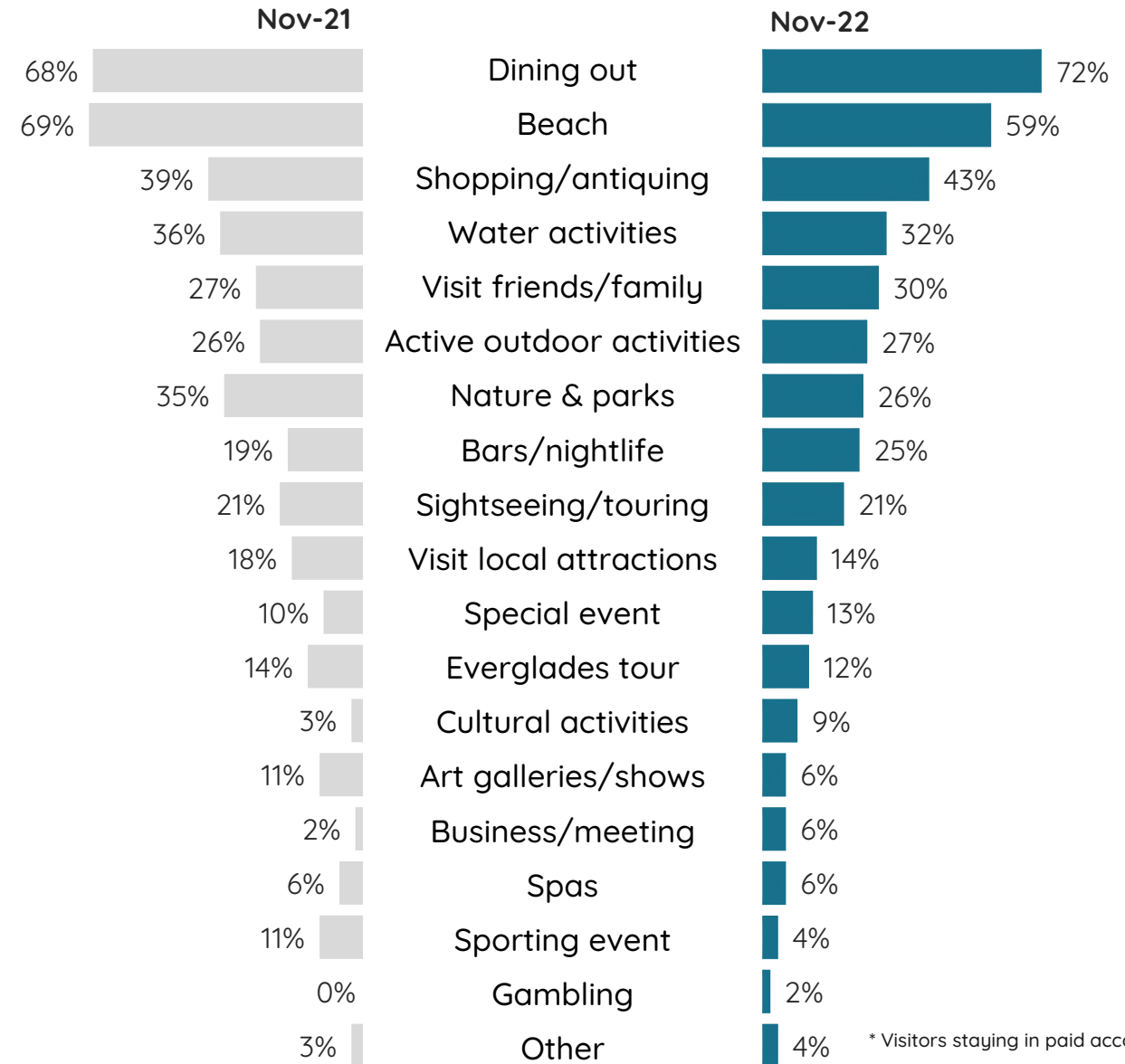


\* Visitors staying in paid accommodations.

# TRIP ACTIVITIES\*

Trip Activities <sup>1</sup>			
	Nov-21	Nov-22	Trend
Dining out	68%	72%	↑
Beach	69%	59%	↓
Shopping/antiquing	39%	43%	↑
Water activities	36%	32%	↓
Visit friends/family	27%	30%	↑
Active outdoor activities	26%	27%	↑
Nature & parks	35%	26%	↓
Bars/nightlife	19%	25%	↑
Sightseeing/touring	21%	21%	-
Visit local attractions	18%	14%	↓
Special event	10%	13%	↑
Everglades tour	14%	12%	↓
Cultural activities	3%	9%	↑
Art galleries/shows	11%	6%	↓
Business/meeting	2%	6%	↑
Spas	6%	6%	-
Sporting event	11%	4%	↓
Gambling	0%	2%	↑
Other	3%	4%	↑

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

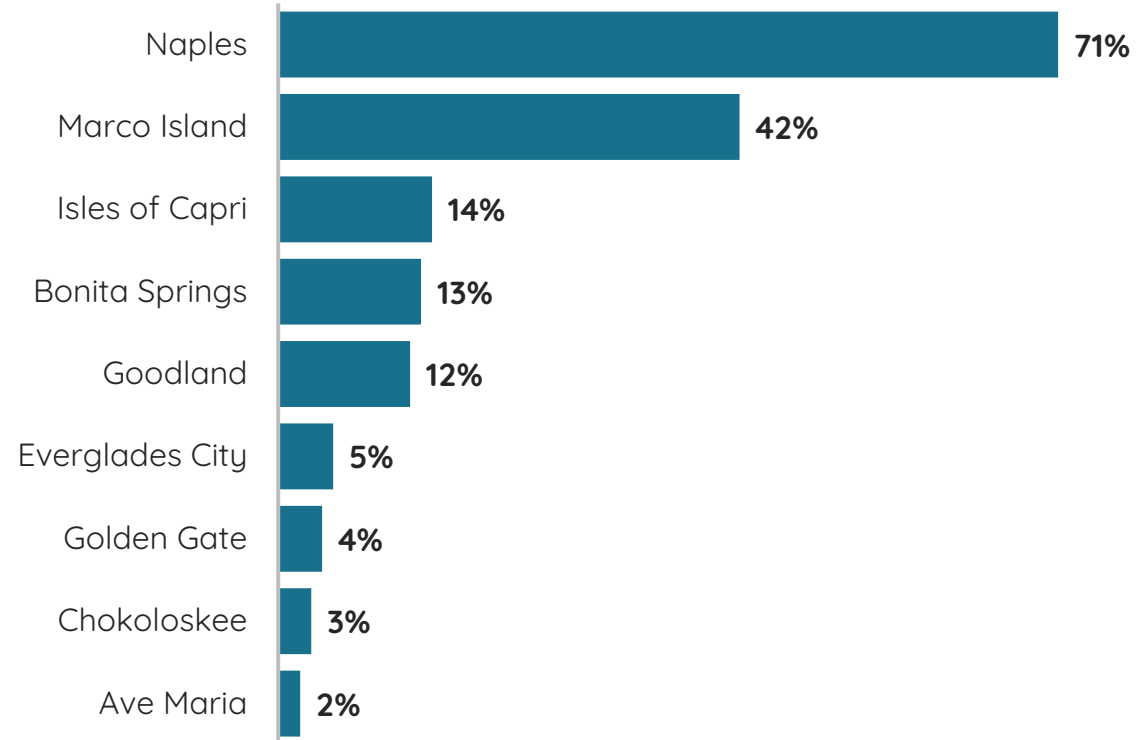


\* Visitors staying in paid accommodations.

# AREAS VISITED\*

Areas Visited in Destination <sup>1</sup>			
	Nov-21	Nov-22	Trend
Naples	-	71%	-
Marco Island	-	42%	-
Isles of Capri	-	14%	-
Bonita Springs	-	13%	-
Goodland	-	12%	-
Everglades City	-	5%	-
Golden Gate	-	4%	-
Chokoloskee	-	3%	-
Ave Maria	-	2%	-

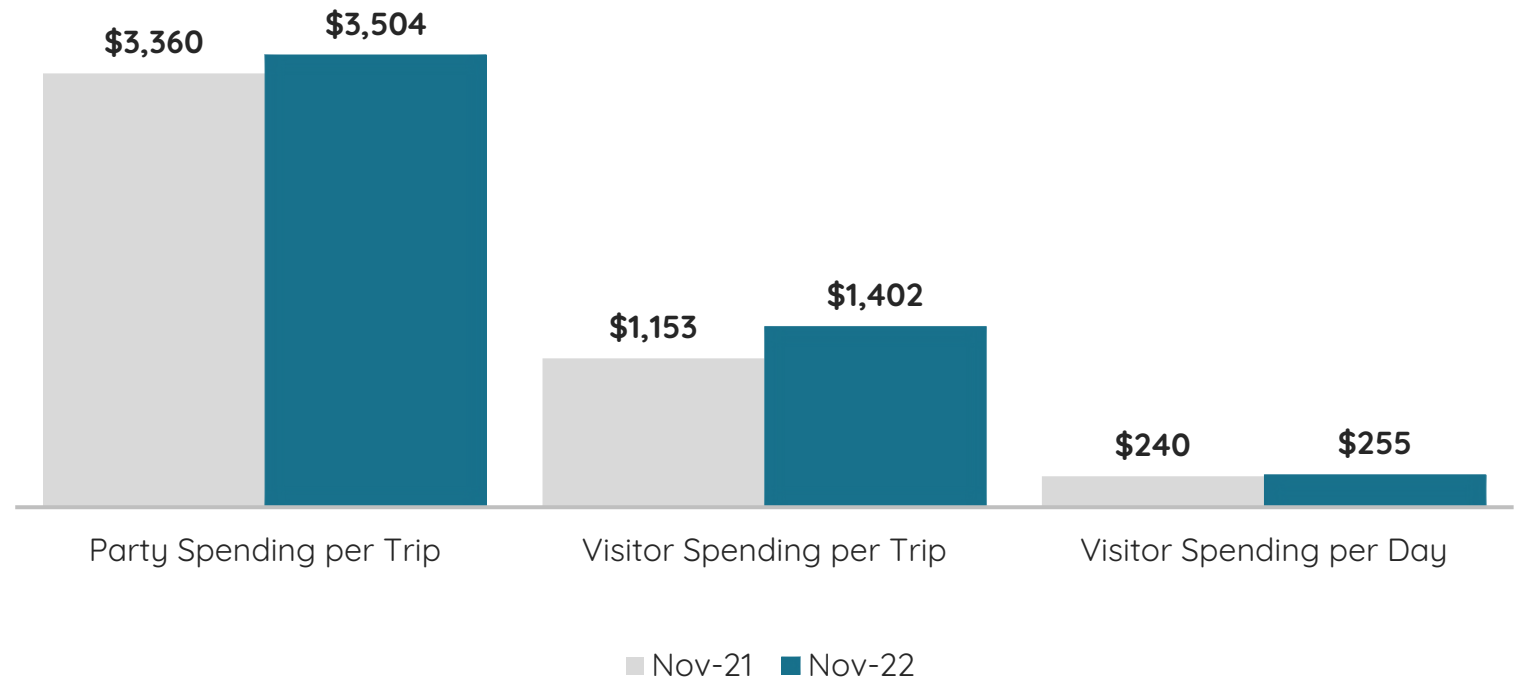
<sup>1</sup>Multiple responses permitted.



\* Visitors staying in paid accommodations.

# VISITOR SPENDING\*

Visitor Spending			
	Nov-21	Nov-22	Trend
Party Spending per Trip	\$3,360	\$3,504	↑
Visitor Spending per Trip	\$1,153	\$1,402	↑
Visitor Spending per Day	\$240	\$255	↑

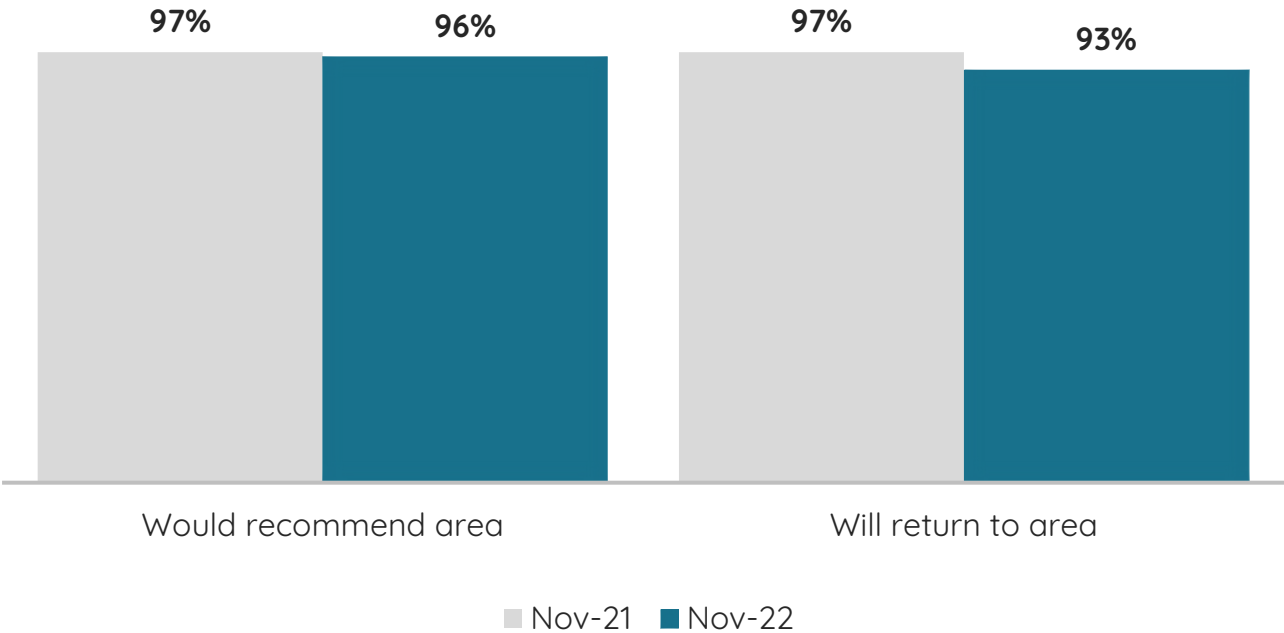


\* Visitors staying in paid accommodations.



Satisfaction with Destination			
	Nov-21	Nov-22	Trend
Value for travel dollar <sup>1</sup>	8.8	8.1	↓
Would recommend area	97%	96%	↓
Will return to area	97%	93%	↓

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

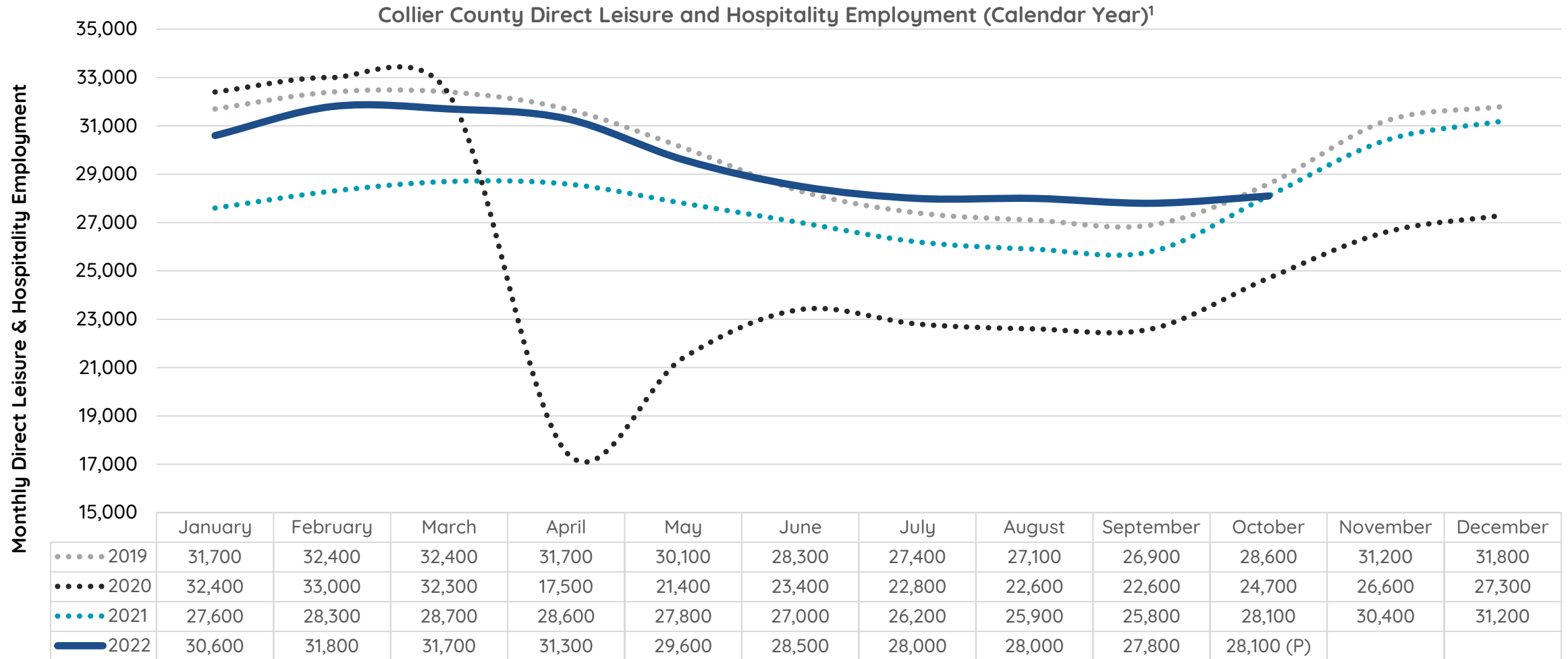


\* Visitors staying in paid accommodations.

# INDUSTRY DATA



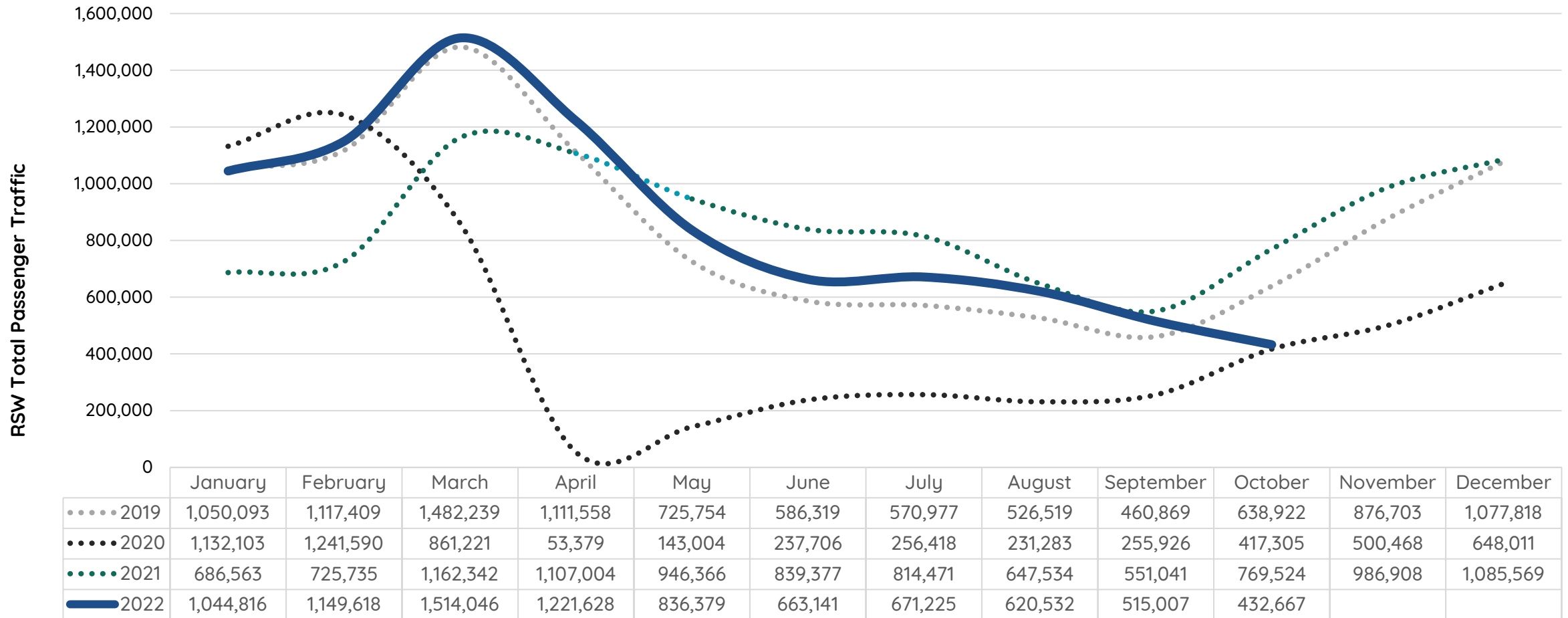
# LEISURE & HOSPITALTY EMPLOYMENT



<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

NOVEMBER 2022 Licensed Transient Rental Units <sup>1</sup>				
	Hotel	Motel	Vacation Rental	Total
Naples	4,452	1,557	3,353	9,362
Marco Island	1,275	115	1,830	3,220
Immokalee	0	55	104	159
Golden Gate	0	150	0	150
Everglades City	38	36	14	88
Bonita Springs	0	5	64	69
Chokoloskee	0	13	2	15
Goodland	0	5	4	9
Ochopee	0	0	2	2
Ave Maria	0	0	1	1
<b>Total</b>	<b>5,765</b>	<b>1,936</b>	<b>5,374</b>	<b>13,075<sup>2</sup></b>

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

<sup>2</sup>Some units are likely still unavailable due to the impact of Hurricane Ian.

# NAPLES, MARCO ISLAND, EVERGLADES

## Convention & Visitors Bureau NOVEMBER 2022 Monthly Dashboard

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