NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau
September 2022 Monthly Dashboard

NAPLES · MARCO ISLAND
EVERGLADES
FLORIDA'S PARADISE COAST

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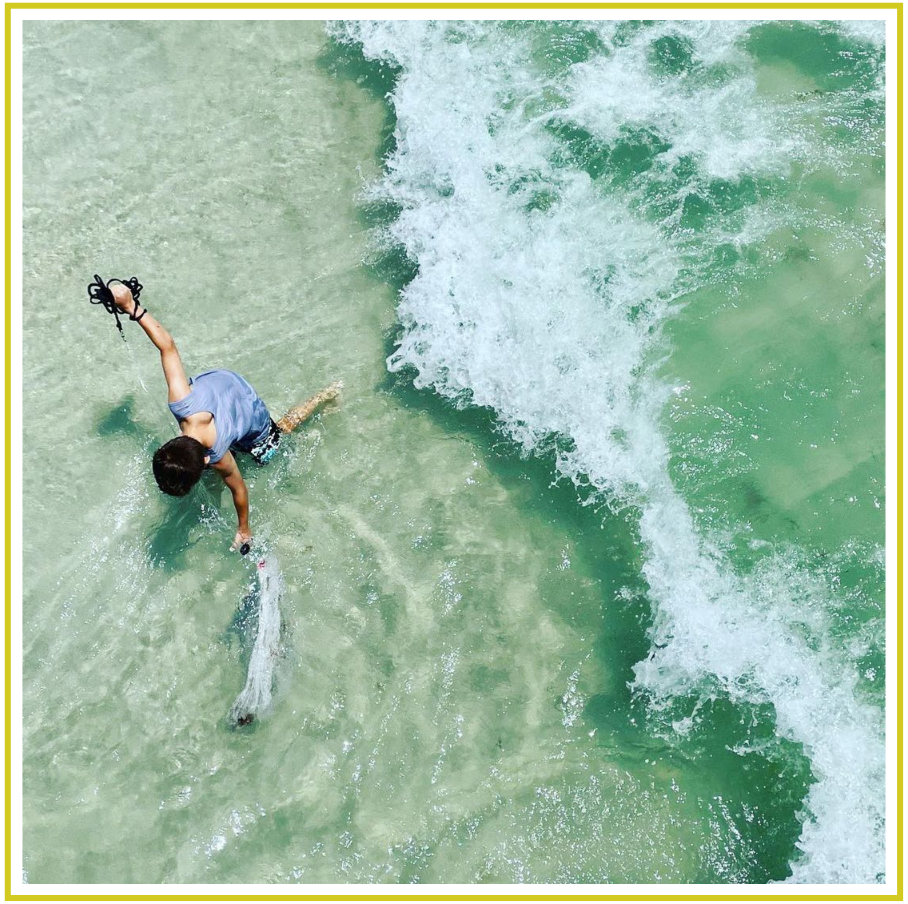
RESEARCH

MONTHLY SNAPSHOT

- Occupancy, ADR, RevPAR, Spending, Economic Impact, etc. all saw YOY decreases in September. These decreases were largely due to Hurricane Ian, which made landfall in Southwest Florida during the final week of the month.

- Visitors in September 2022 rated their value for travel dollar within Collier County at 9.4 out of 10, the highest rating seen since this metric was implemented in October of 2021.

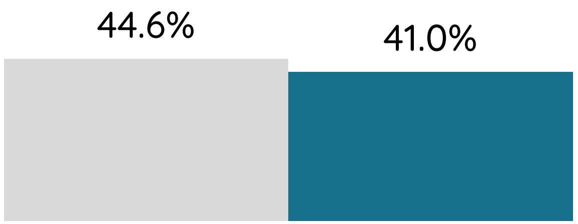
- The median number of days that visitors spent planning their trips dropped to 47 in September, 10 days shorter than last month.



SEPTEMBER 2022 LODGING METRICS*

OCCUPANCY RATE

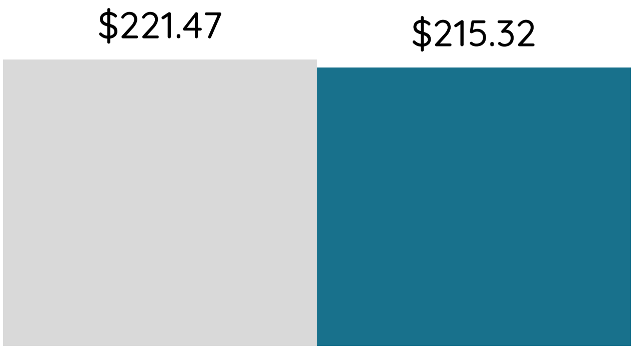
41.0%



- 8.1% from 2021

AVERAGE DAILY RATE

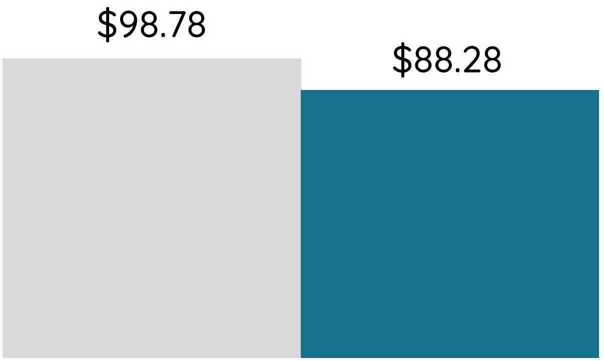
$215.32



- 2.8% from 2021

REVENUE PER AVAILABLE ROOM

$88.28



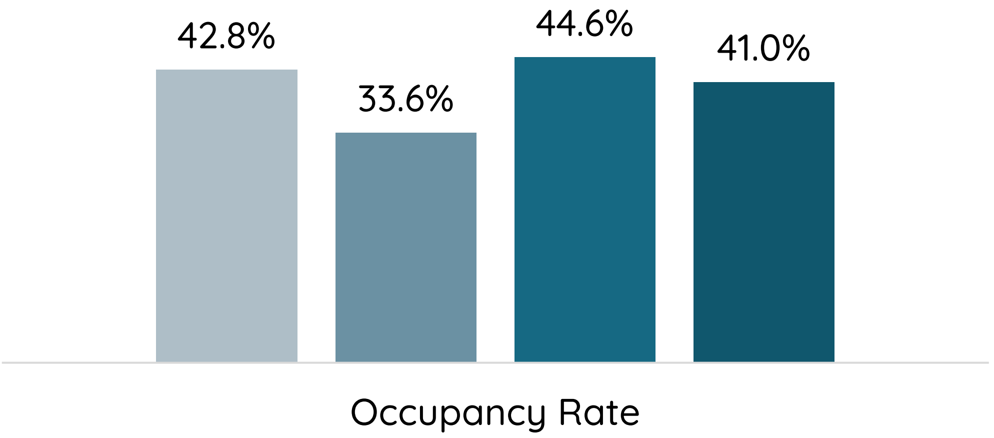
- 10.6% from 2021

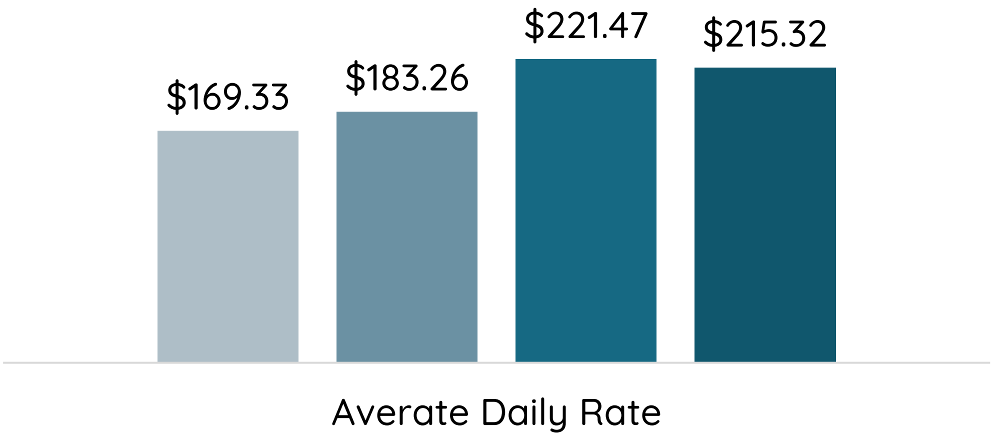
Sep-21 Sep-22

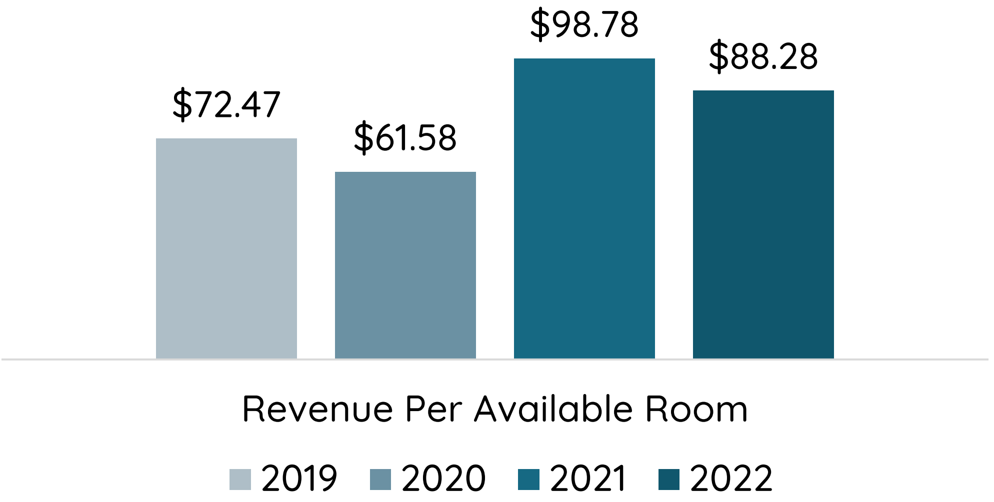
* Visitors staying in paid accommodations.

SEPTEMBER 2019–2022 LODGING METRICS*

NAPLES · MARCO ISLAND
EVERGLADES
FLORIDA'S PARADISE COAST







* Visitors staying in paid accommodations.

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RESEARCH

SEPTEMBER 2022 VISITATION & ROOM NIGHTS*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

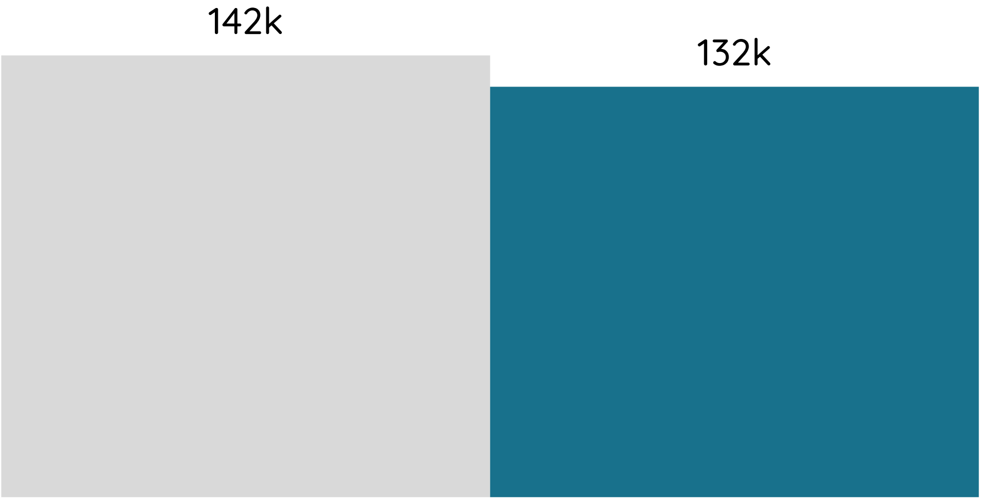
VISITORS

86,200

- **0.2%** from 2021

ROOM NIGHTS

132,200



- **7.1%** from 2021

Sep-21 Sep-22

* Visitors staying in paid accommodations.

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SEPTEMBER 2022 SPENDING & ECONOMIC IMPACT*

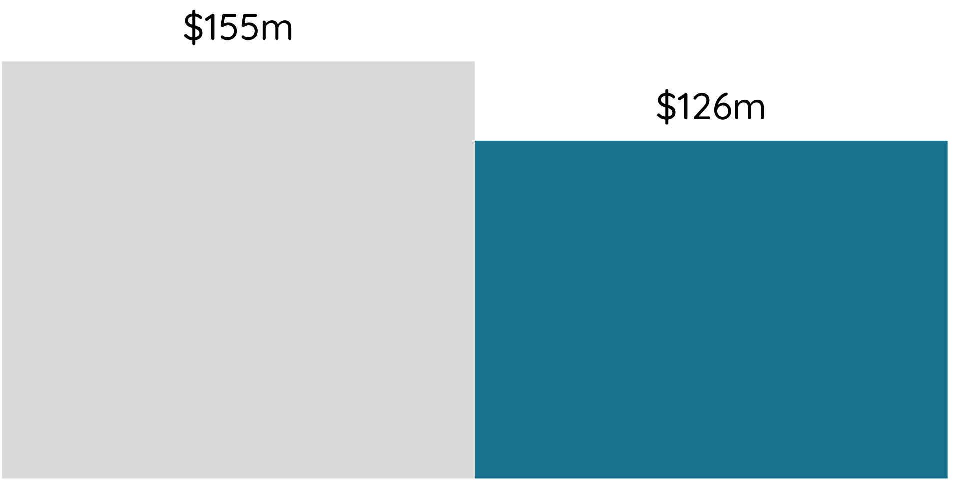
DIRECT SPENDING

$84,382,200

- 19.0% from 2021

ECONOMIC IMPACT

$125,813,900



- 19.0% from 2021

Sep-21 Sep-22

* Visitors staying in paid accommodations.

VISITOR ORIGIN*

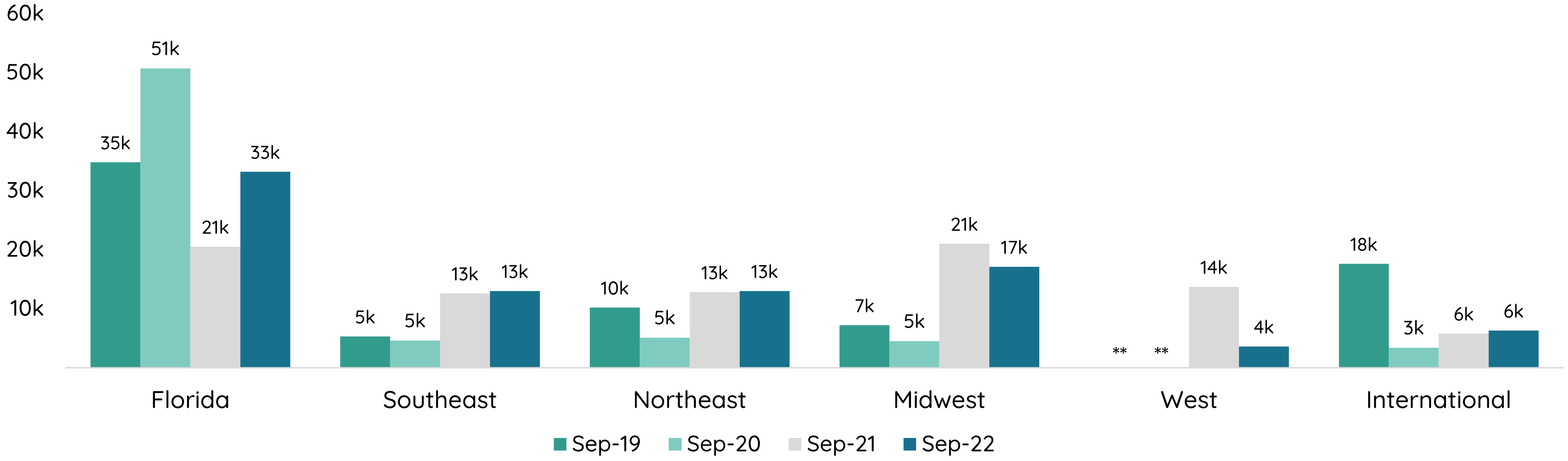
NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

FLORIDA VISITORS

33,200

OUT-OF-STATE VISITORS

53,000



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

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CUMULATIVE VISITATION & ROOM NIGHTS*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

CYTD VISITORS

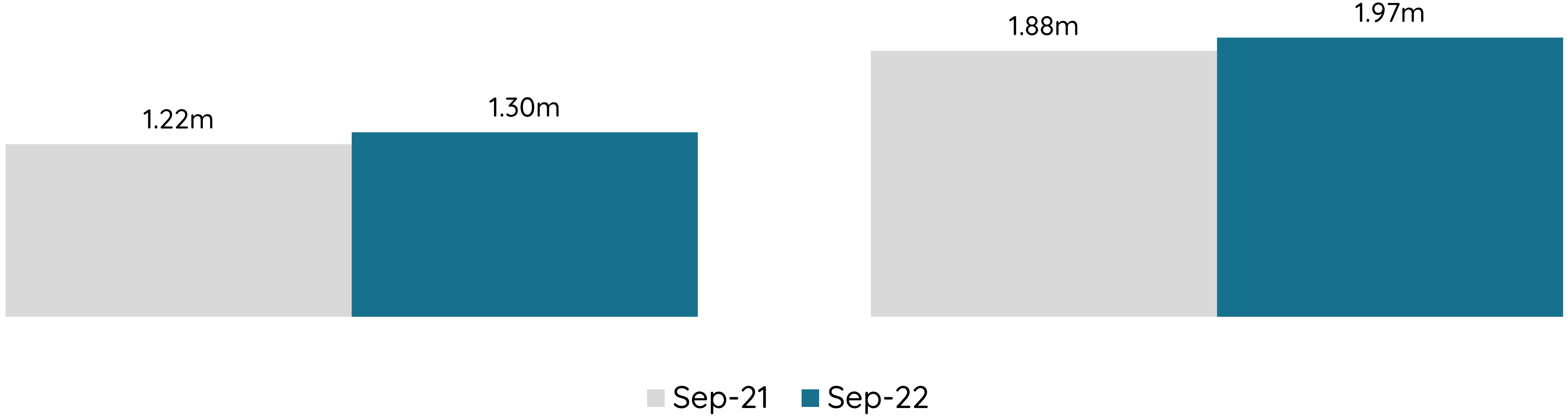
1,302,500

+ 6.9% from 2021

CYTD ROOM NIGHTS

1,970,900

+ 5.0% 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

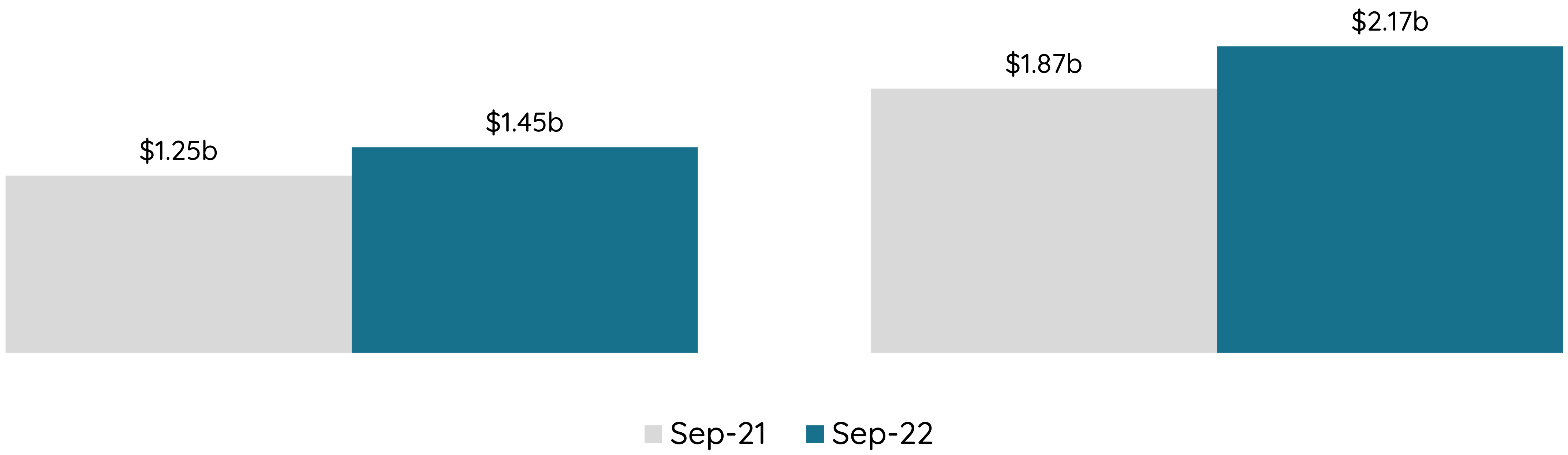
$1,452,307,500

+ 16.0% from 2021

CYTD ECONOMIC IMPACT

$2,165,390,600

+ 16.0% from 2021



* Visitors staying in paid accommodations.

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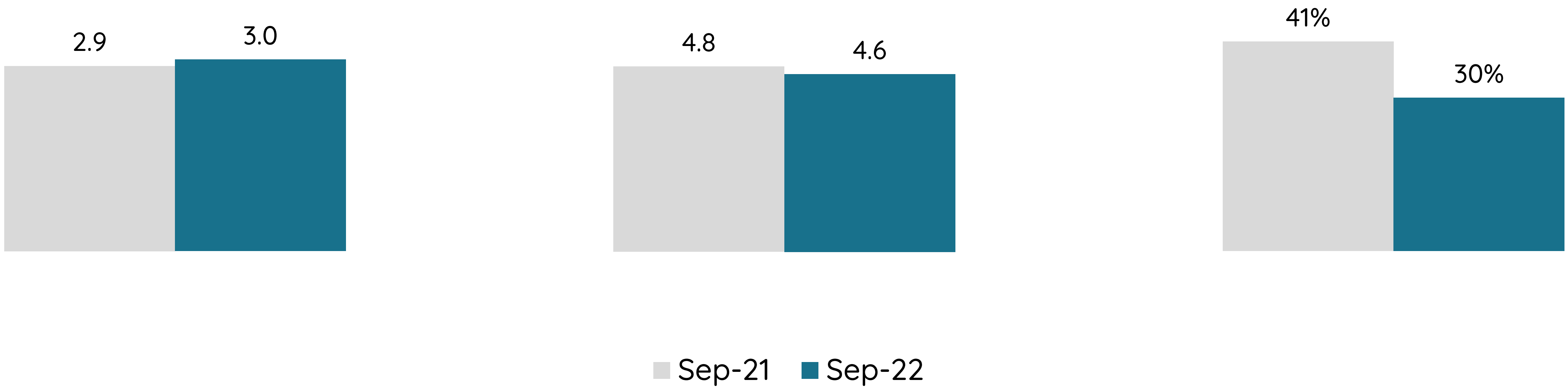
TRIP CHARACTERISTICS*

TRAVEL PARTY SIZE
3.0

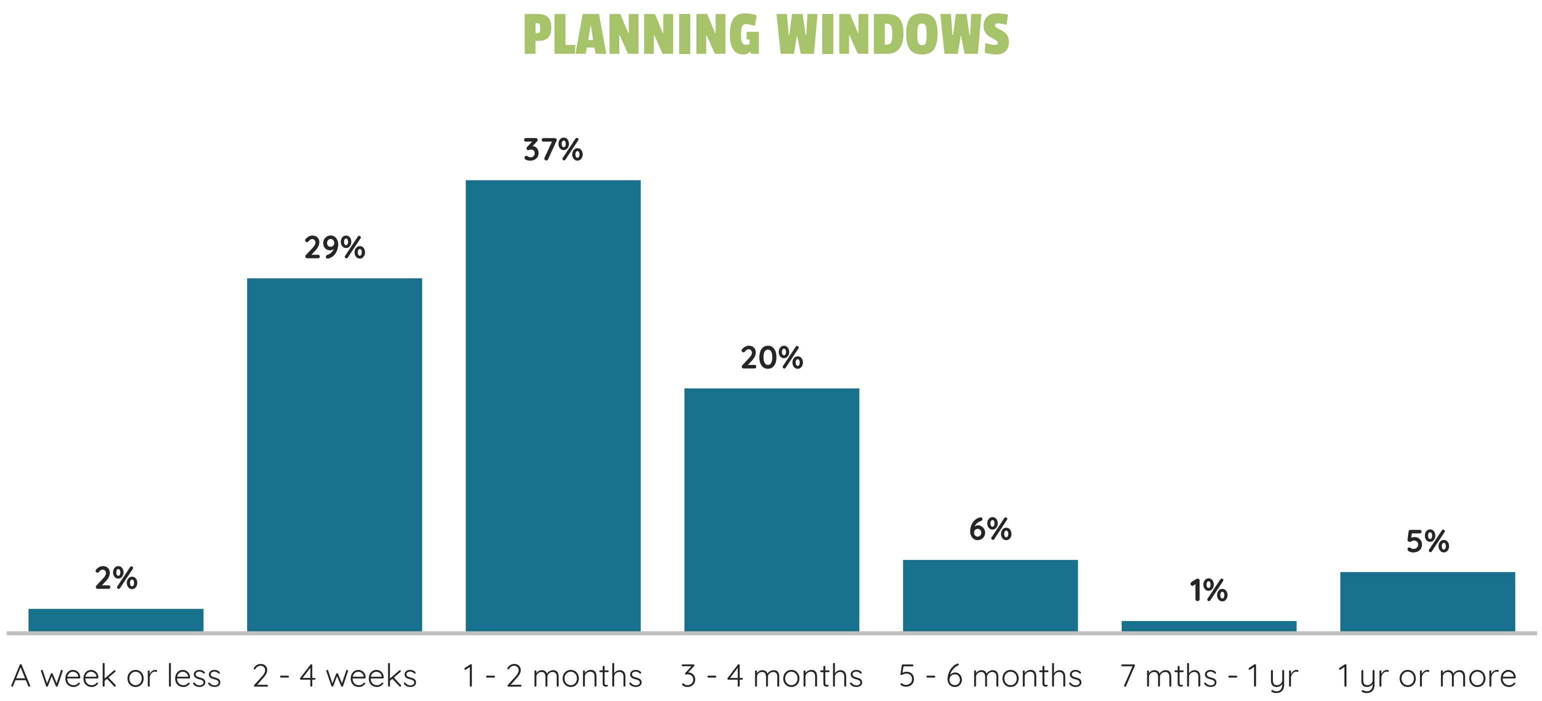
NIGHTS STAYED
4.6

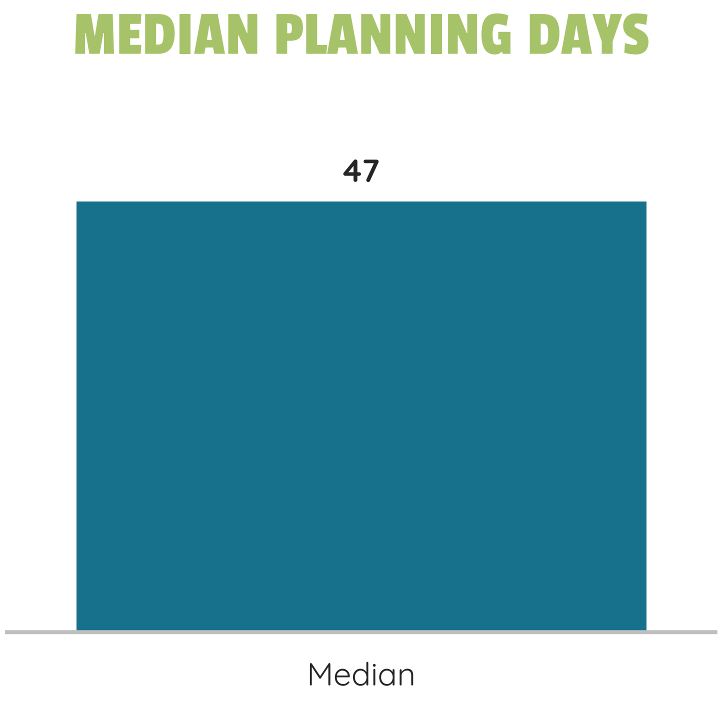
1ST TIME VISITORS
30%



* Visitors staying in paid accommodations.

TRIP PLANNING CYCLE*



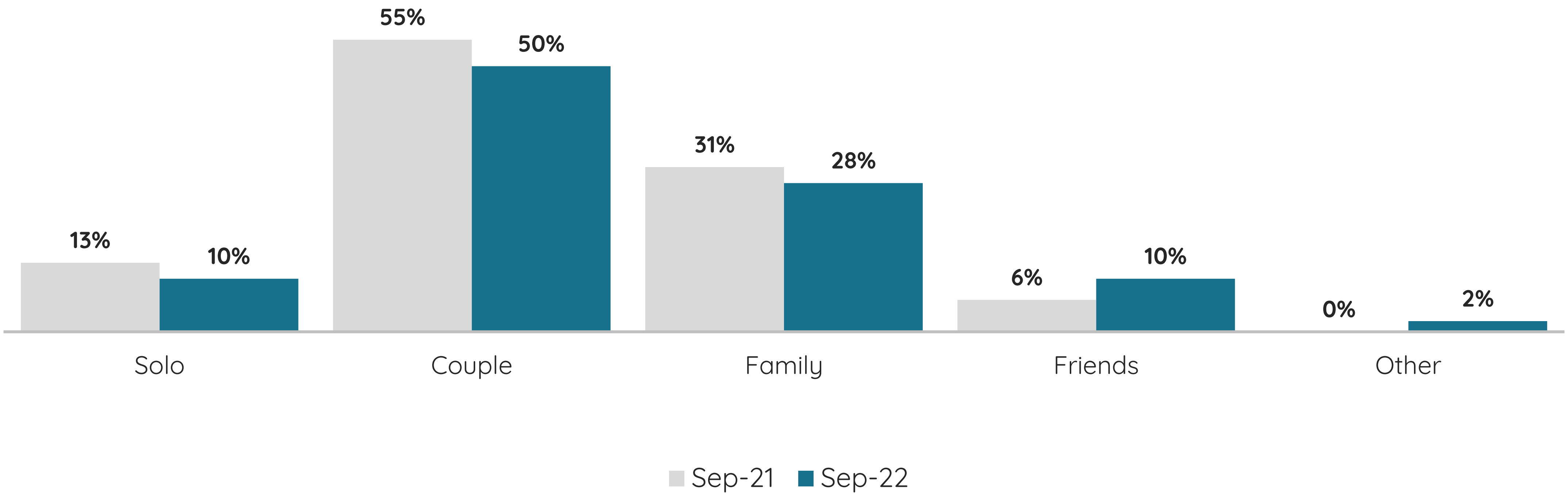


* Visitors staying in paid accommodations.

TRAVEL PARTIES*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

TRAVEL PARTY COMPOSITION



* Visitors staying in paid accommodations.

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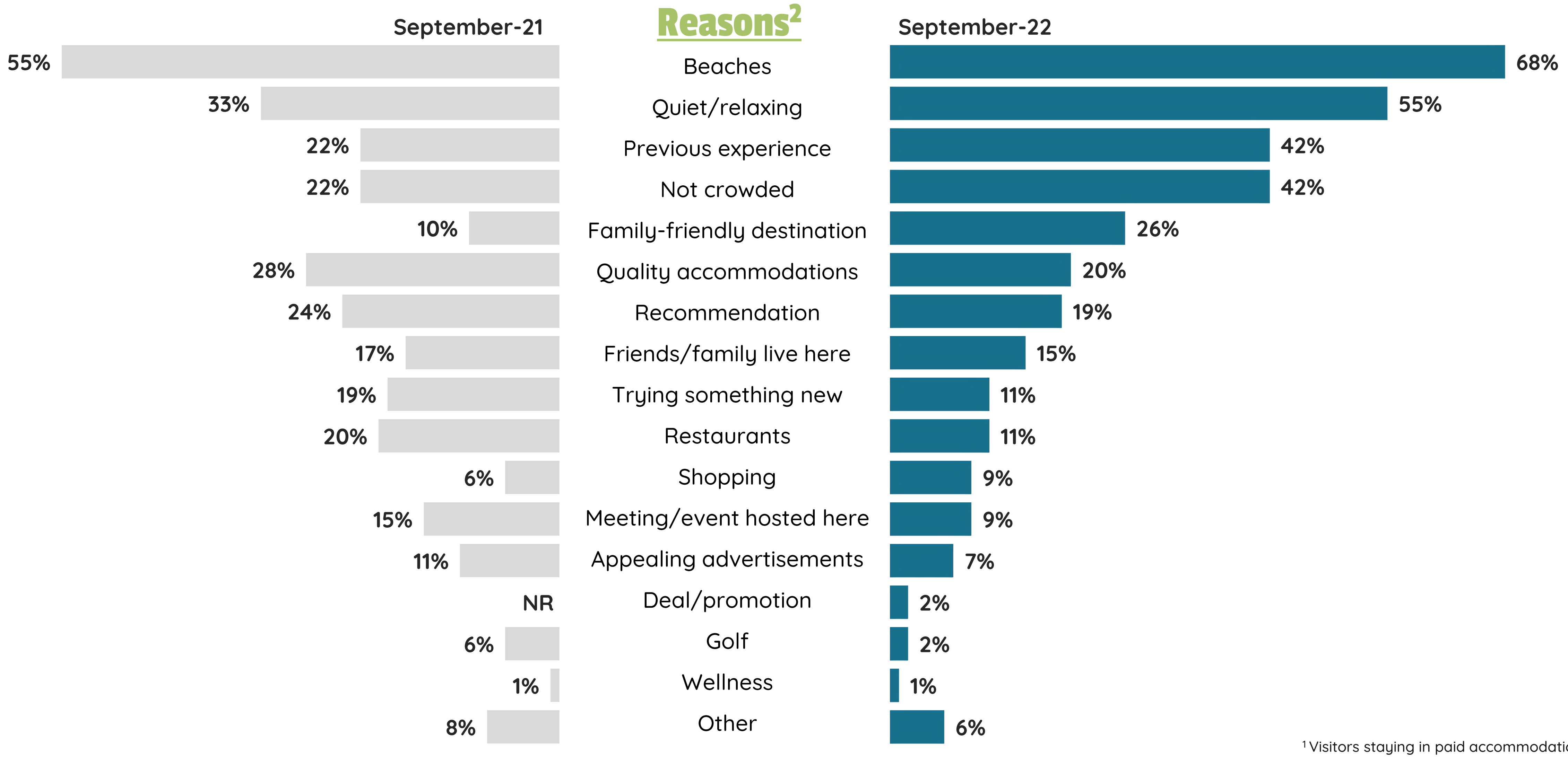
REASONS FOR CHOOSING AREA[1]

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST



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

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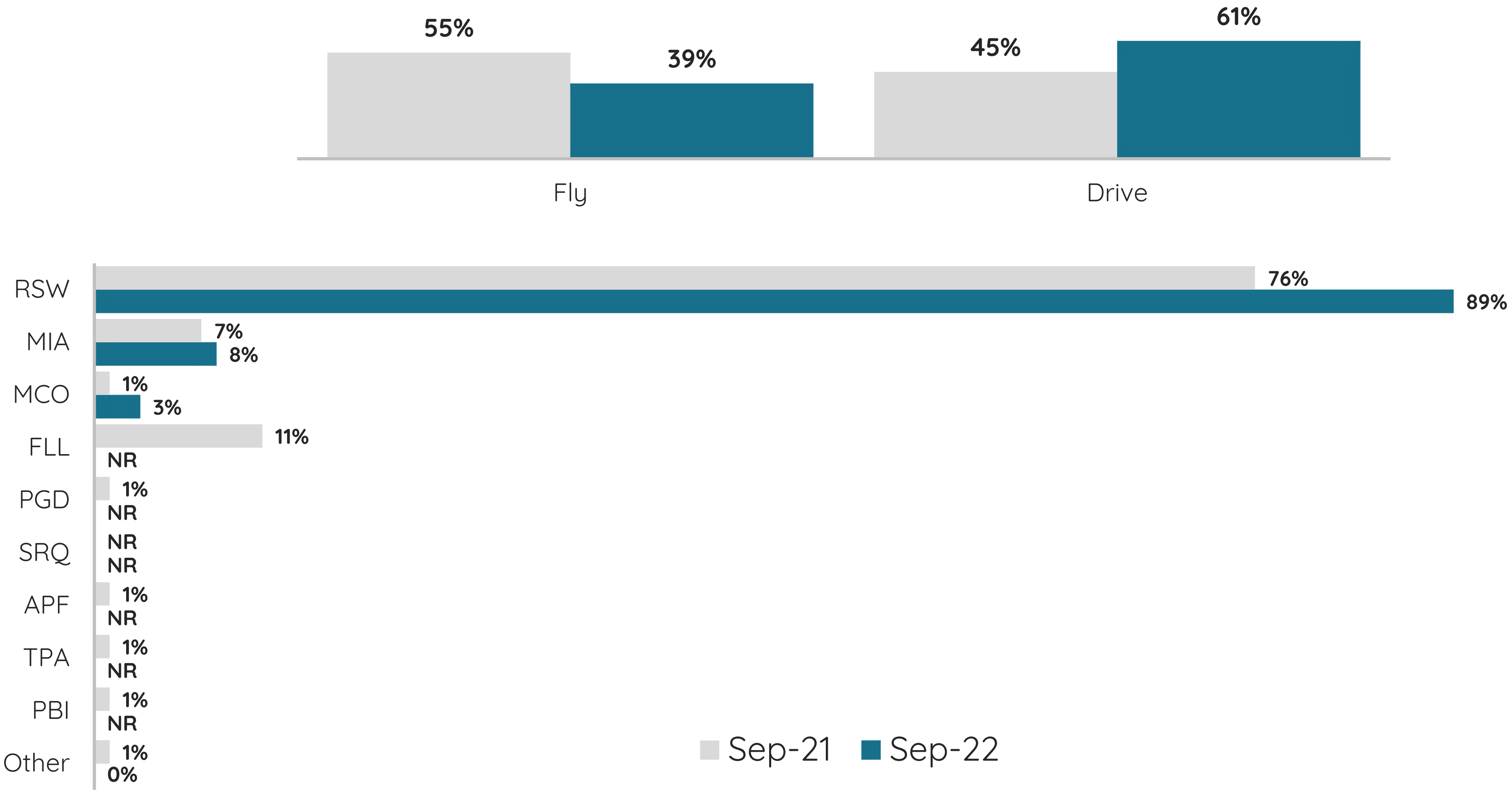
TRANSPORTATION METHODS*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST



* Visitors staying in paid accommodations.

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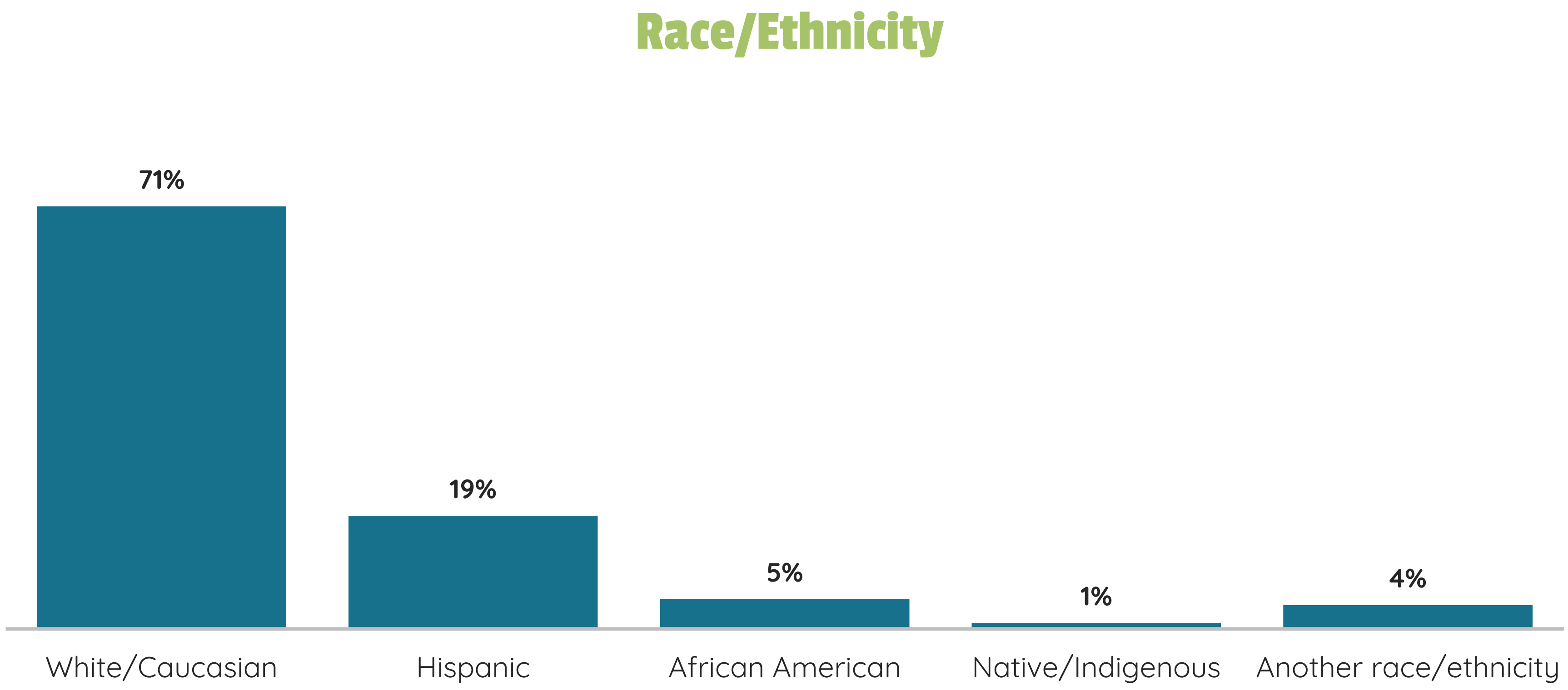
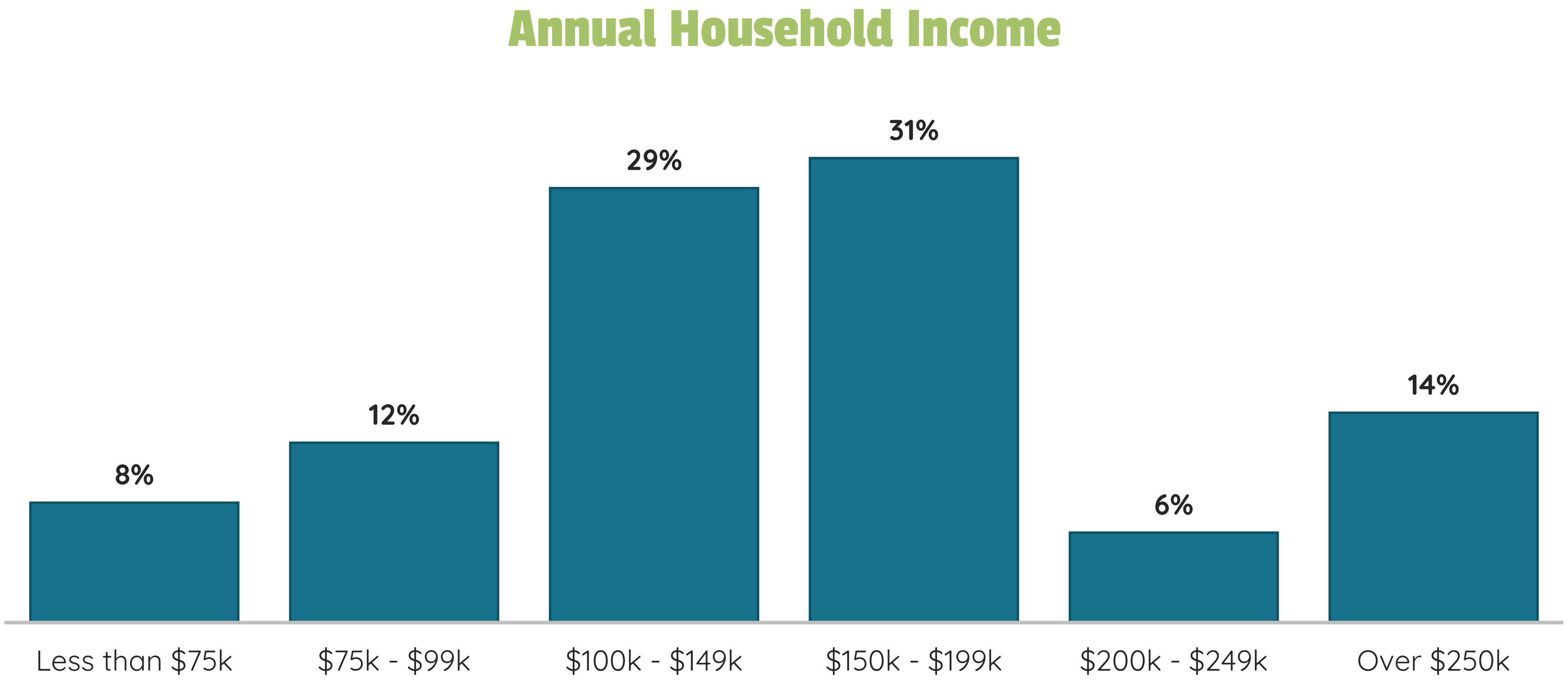
VISITOR DEMOGRAPHICS*

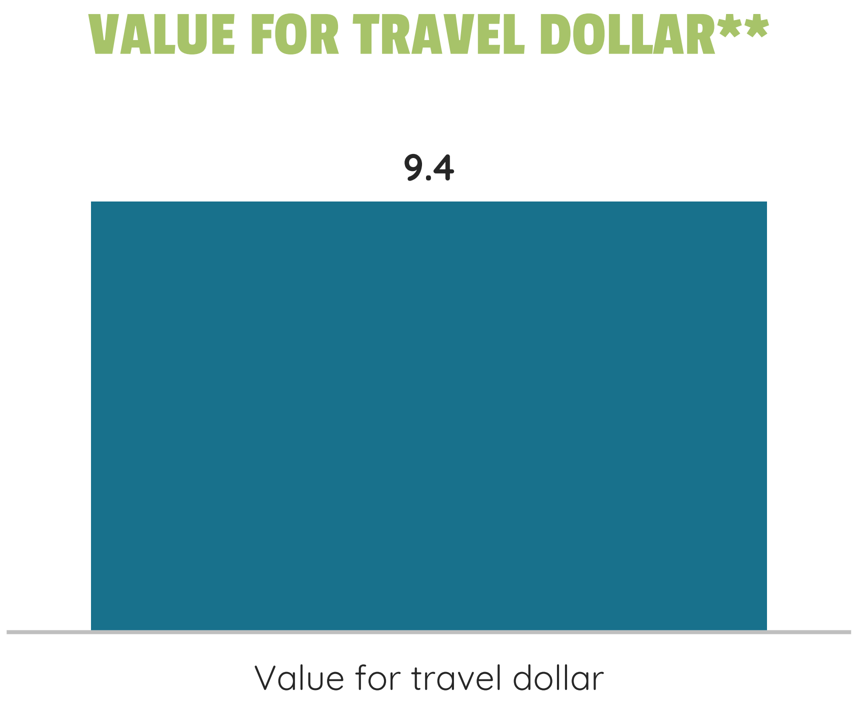


* Visitors staying in paid accommodations.



* Visitors staying in paid accommodations.

TRIP EVALUATIONS*



* 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.

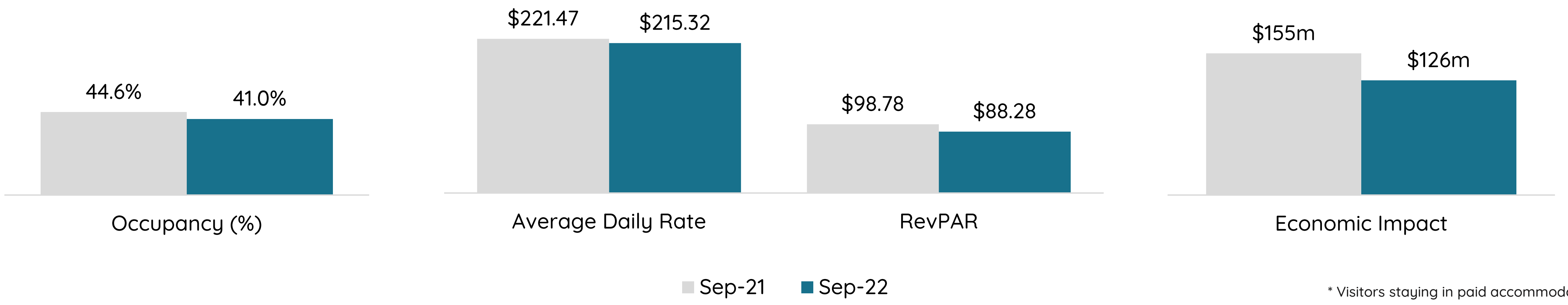
SEPTEMBER 2022 METRICS

SEPTEMBER 2022 OVERNIGHT VISITATION & LODGING*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

	September 2021	September 2022	% Change from 2021
Occupancy Rate	44.6%	41.0%	- 8.1%
Average Daily Rate	$221.47	$215.32	- 2.8%
RevPAR	$98.78	$88.28	- 10.6%

	September 2021	September 2022	% Change from 2021
Visitors	86,400	86,200	- 0.2%
Room Nights	142,300	132,200	- 7.1%
Direct Spending	$104,200,500	$84,382,200	- 19.0%
Economic Impact	$155,362,900	$125,813,900	- 19.0%



* Visitors staying in paid accommodations.

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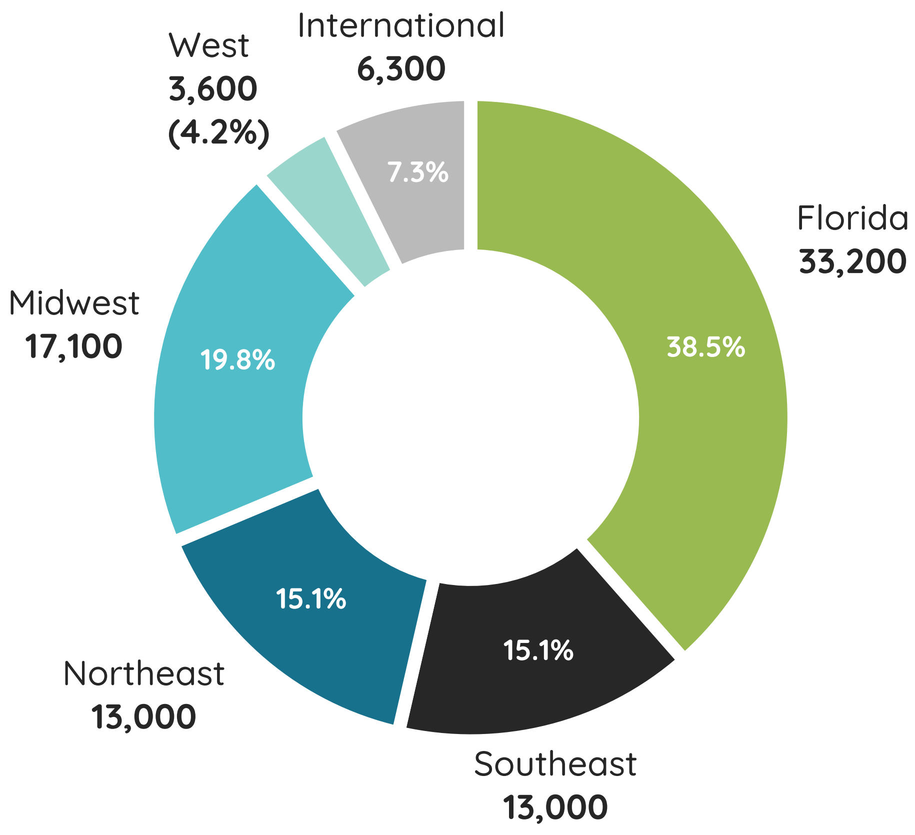
SEPTEMBER 2022 OVERNIGHT VISITOR ORIGIN MARKETS*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

	September 2021		September 2022		Percent Change (Δ%)	
Region	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	20,500	23.6%	33,200	38.5%	+ 62.0%	+ 63.1%
Southeast	12,600	14.6%	13,000	15.1%	+ 3.2%	+ 3.4%
Northeast	12,800	14.8%	13,000	15.1%	+ 1.6%	+ 2.0%
Midwest	21,000	24.3%	17,100	19.8%	- 18.6%	- 18.5%
West	13,700	15.9%	3,600	4.2%	- 73.7%	- 73.6%
Canada	1,900	2.2%	3,500	4.1%	+ 84.2%	+ 86.4%
Europe[1]	0	0.0%	1,700	2.0%	-	-
C/S America	3,900	4.5%	100	0.1%	- 97.4%	- 97.8%
Other[1]	0	0.0%	1,000	1.1%	-	-
Total	86,400	100.0%	86,200	100.0%		

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



* Visitors staying in paid accommodations.

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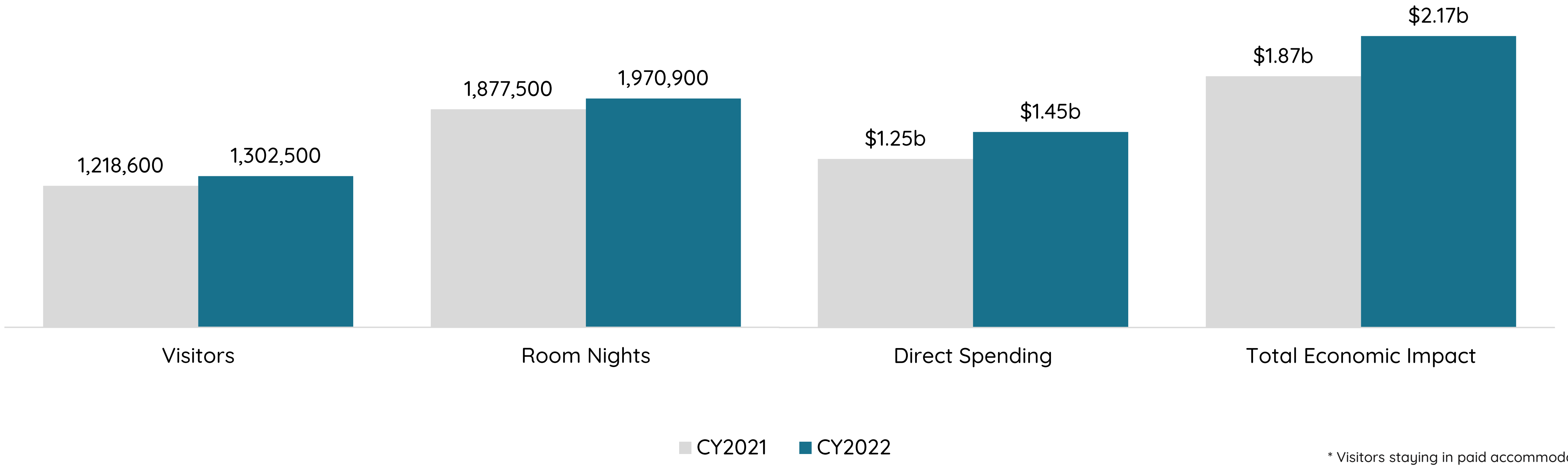
CALENDAR YEAR-TO-DATE METRICS

CYTD OVERNIGHT VISITATION & LODGING*

NAPLES • MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

	CYTD 2021	CYTD 2022	% Change from 2021
Visitors	1,218,600	1,302,500	+ 6.9%
Room Nights	1,877,500	1,970,900	+ 5.0%
Direct Spending	$1,251,885,500	$1,452,307,500	+ 16.0%
Economic Impact	$1,866,561,300	$2,165,390,600	+ 16.0%



* Visitors staying in paid accommodations.

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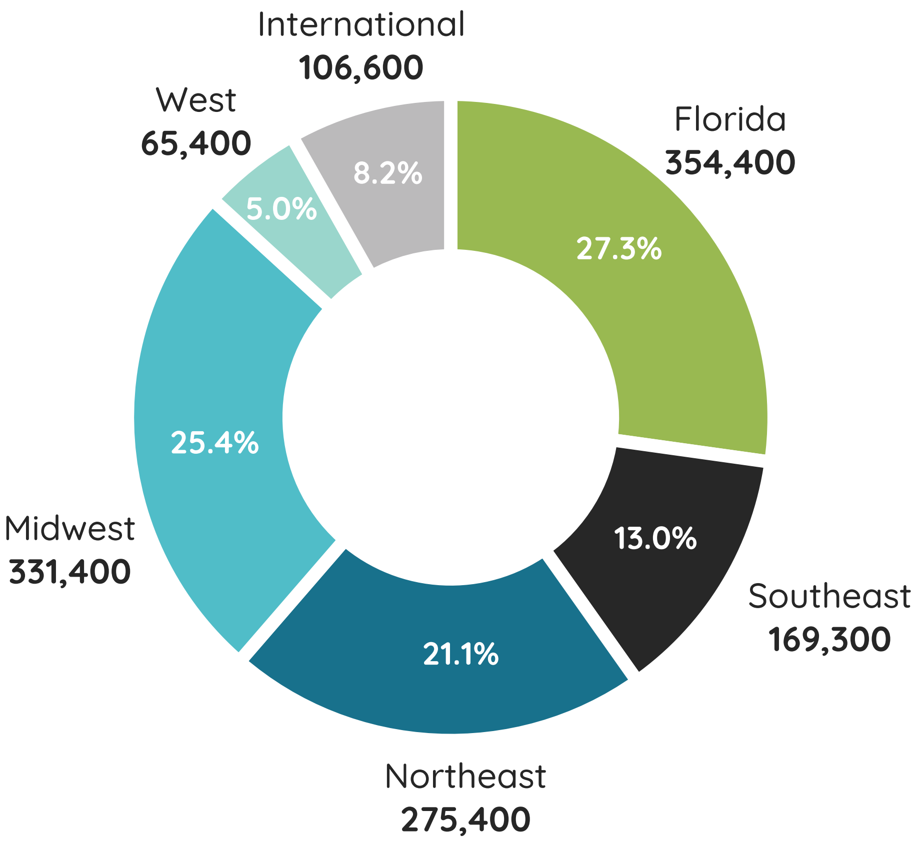
CYTD OVERNIGHT VISITOR ORIGIN MARKETS*

	CY2021		CY2022		Percent Change (Δ%)	
Region	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	592,100	48.5%	354,400	27.3%	- 40.1%	- 43.7%
Southeast	120,200	9.9%	169,300	13.0%	+ 40.8%	+ 31.3%
Northeast	230,900	18.9%	275,400	21.1%	+ 19.3%	+ 11.6%
Midwest	225,400	18.5%	331,400	25.4%	+ 47.0%	+ 37.3%
West[1]	25,500	2.1%	65,400	5.0%	+ 156.5%	+ 138.1%
Canada[2]	5,900	0.5%	31,700	2.4%	+ 437.3%	+ 380.0%
Europe[2]	13,100	1.1%	46,600	3.6%	+ 255.7%	+ 227.3%
C/S America[2]	5,500	0.5%	13,100	1.0%	+ 138.2%	+ 100.0%
Other	0	0.0%	15,200	1.2%	-	-
Total	1,218,600	100.0%	1,302,500	100.0%		

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



* Visitors staying in paid accommodations.

SEPTEMBER 2022 VISITOR PROFILE

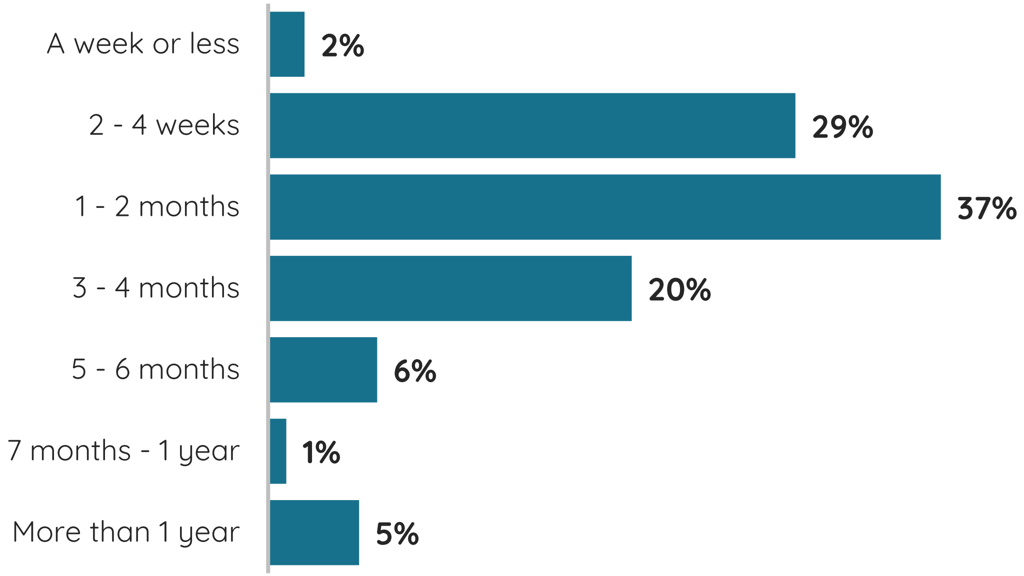
OF OVERNIGHT VISITORS

TRIP PLANNING CYCLE*

NAPLES · MARCO ISLAND
EVERGLADES
FLORIDA'S PARADISE COAST

Trip Planning Cycle			
	Sep-21	Sep-22	Trend
A week or less	-	2%	-
2 - 4 weeks	-	29%	-
1 - 2 months	-	37%	-
3 - 4 months	-	20%	-
5 - 6 months	-	6%	-
7 months – 1 year	-	1%	-
More than 1 year	-	5%	-
Median (days)	**-**	**47**	**-**

[1] Multiple responses permitted.



* Visitors staying in paid accommodations.

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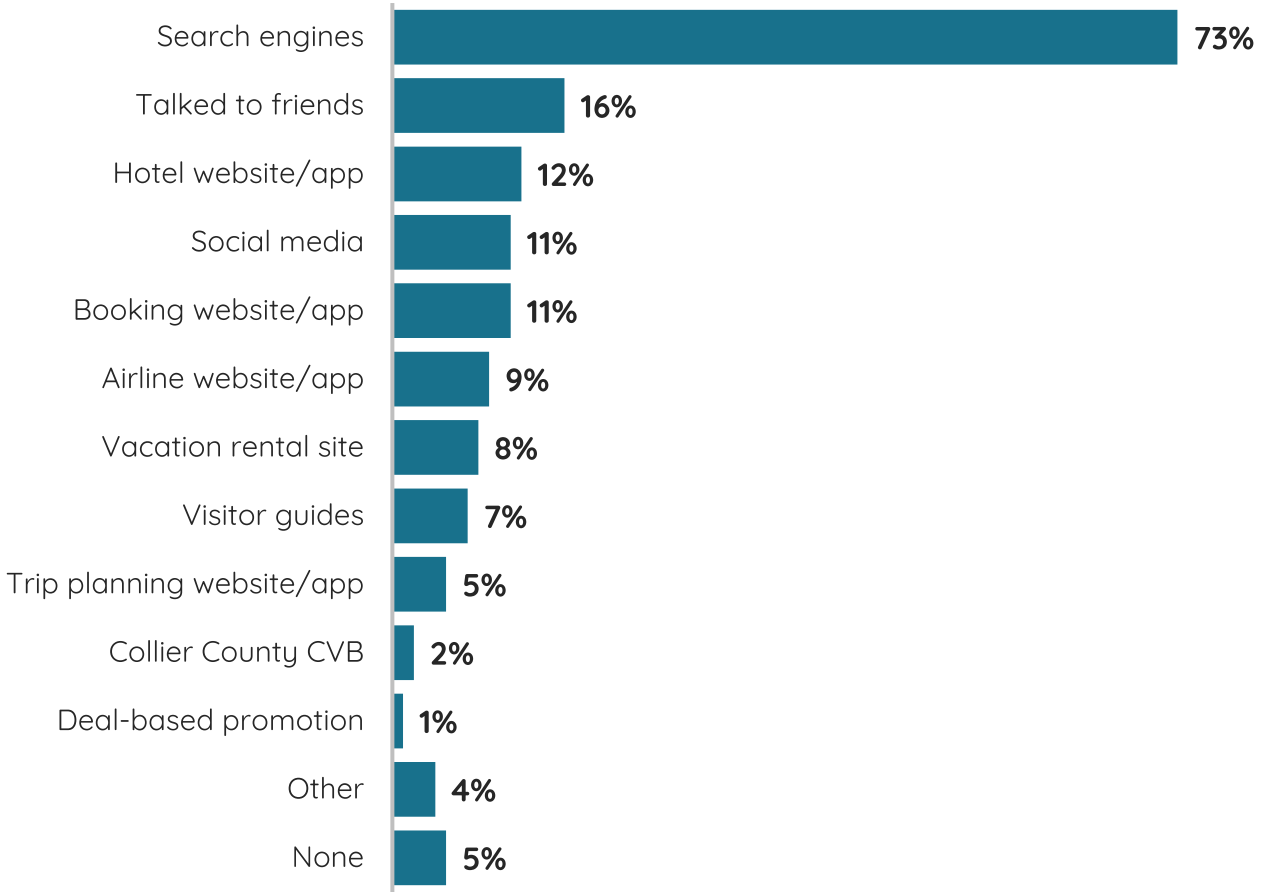
RESEARCH

TRIP PLANNING RESOURCES*

NAPLES • MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

Top Trip Planning Resources[1]	Sep-21	Sep-22	Trend
Search engines	-	73%	-
Talked to friends	-	16%	-
Hotel website/app	-	12%	-
Booking website/app	-	11%	-
Social media	-	11%	-
Airline website/app	-	9%	-
Vacation rental site	-	8%	-
Visitor guides	-	7%	-
Trip planning site/app	-	5%	-
Collier County CVB	-	2%	-
Deal-based promotion	-	1%	-
Other	-	4%	-
None	-	5%	-

[1] Multiple responses permitted.



* Visitors staying in paid accommodations.

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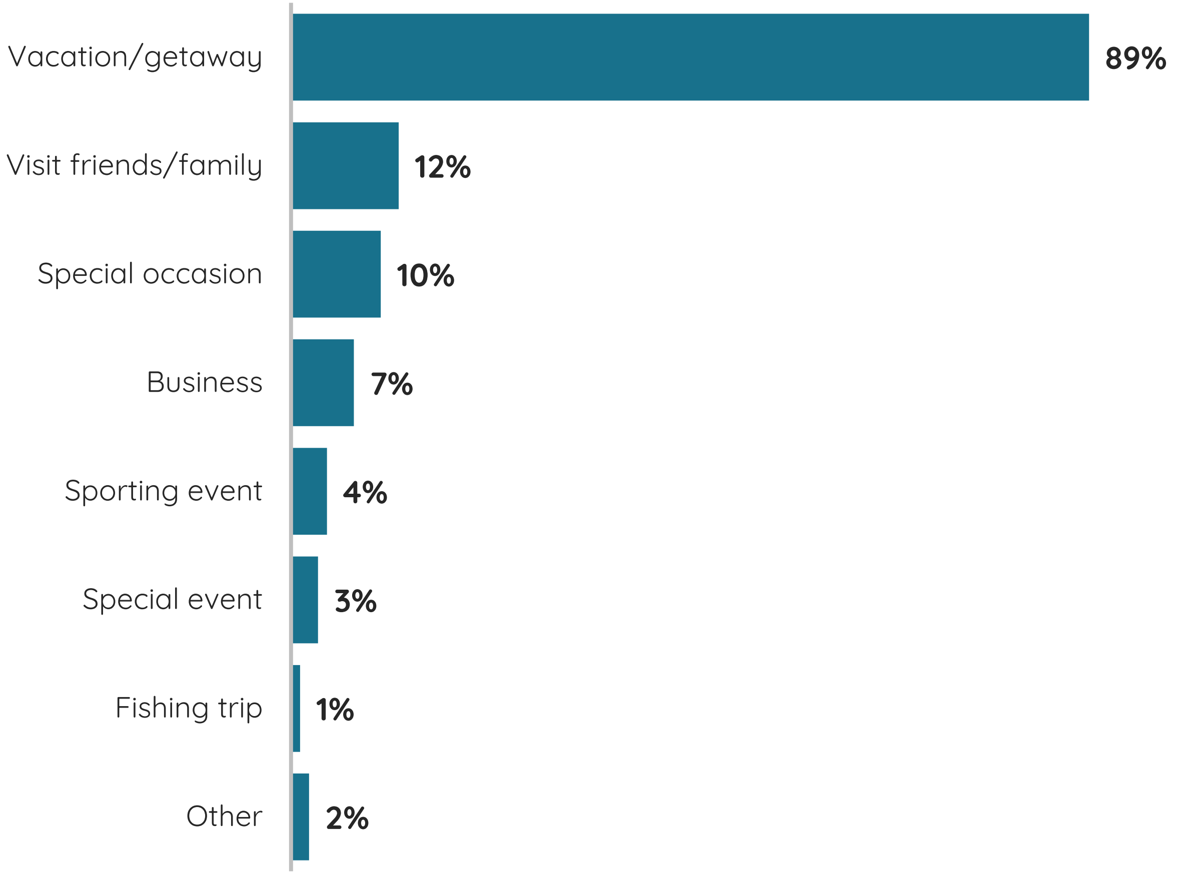
REASONS FOR VISITING*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

Top Reasons for Visiting[1]	Sep-21	Sep-22	Trend
Vacation/getaway	86%	89%	↑
Visit friends/family	18%	12%	↓
Special occasion	22%	10%	↓
Business	11%	7%	↓
Sporting event	-	4%	-
Special event	11%	3%	↓
Fishing trip	-	1%	-
Other	7%	2%	↓

[1] Multiple responses permitted.



* Visitors staying in paid accommodations.

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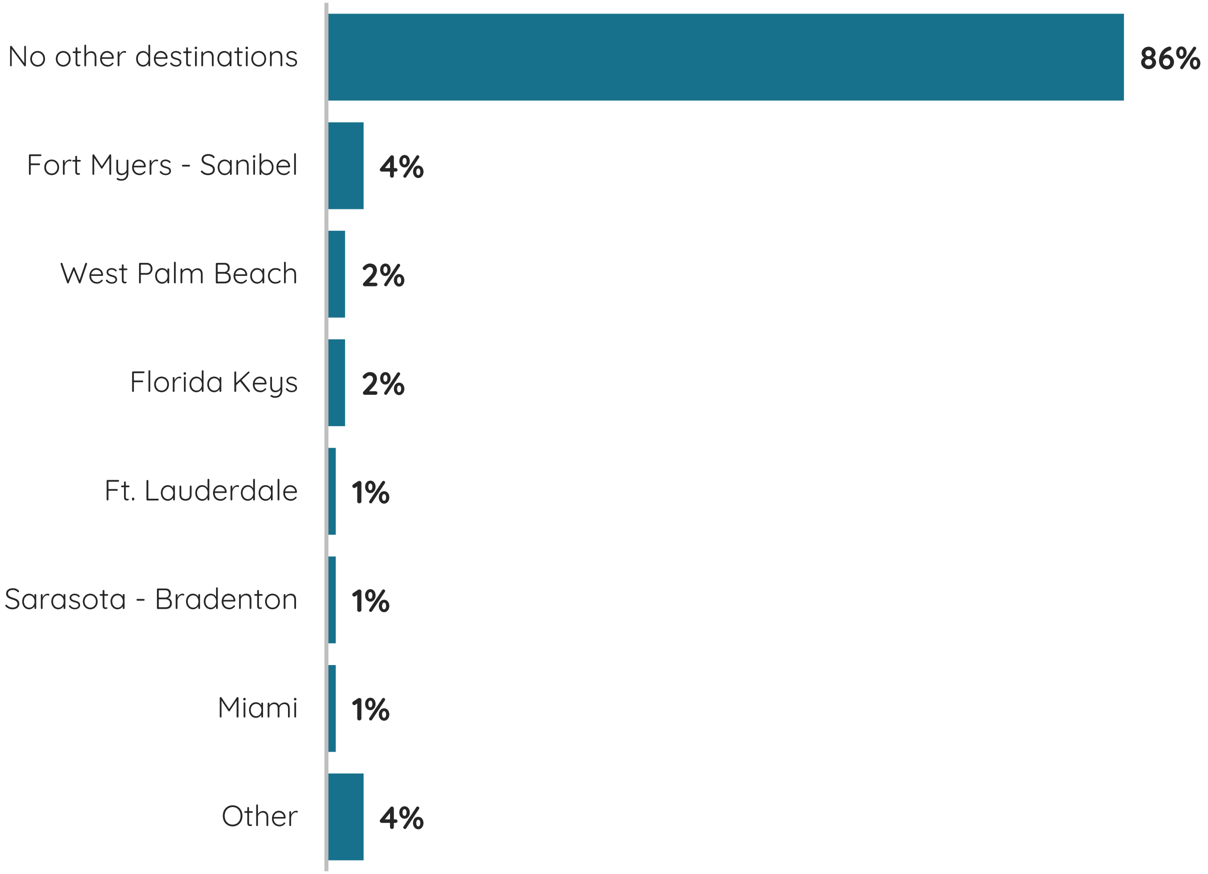
OTHER DESTINATIONS CONSIDERED*

Other Destinations Considered[1]			
	Sep-21	Sep-22	Trend
No other destinations	-	86%	-
Fort Myers – Sanibel	-	4%	-
West Palm Beach	-	2%	-
Florida Keys	-	2%	-
Ft. Lauderdale	-	1%	-
Sarasota - Bradenton	-	1%	-
Miami	-	1%	-
Other	-	4%	-

[1] Multiple responses permitted.



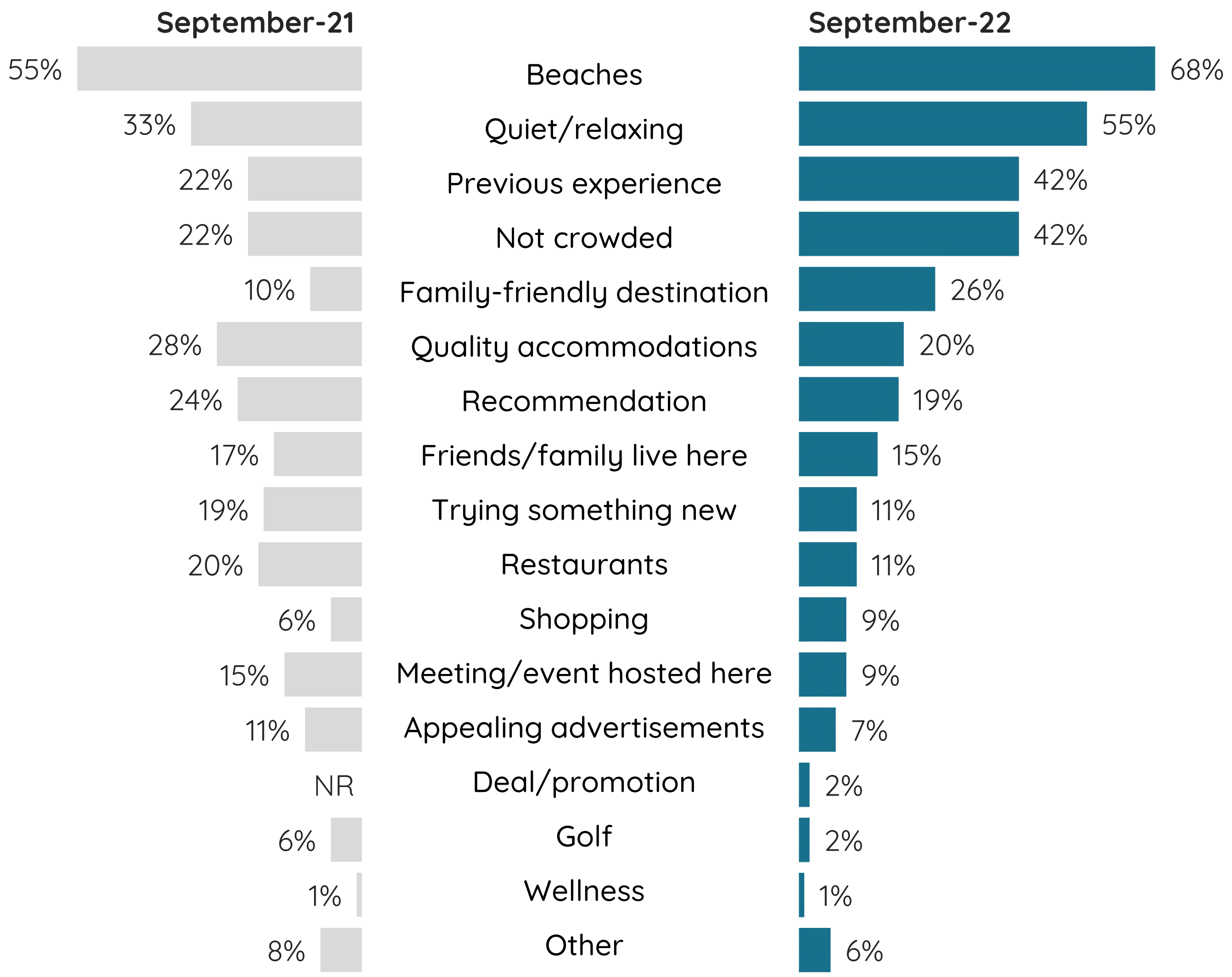
* Visitors staying in paid accommodations.

REASONS FOR CHOOSING AREA*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

Reasons for Choosing Area[1]	Sep-21	Sep-22	Trend
Beaches	55%	68%	↑
Quiet/relaxing	33%	55%	↑
Previous experience	22%	42%	↑
Not crowded	22%	42%	↑
Family-friendly destination	10%	26%	↑
Quality of accommodations	28%	20%	↓
Recommendation	24%	19%	↓
Friends/family live here	17%	15%	↓
Trying something new	19%	11%	↓
Restaurants	20%	11%	↓
Shopping	6%	9%	↑
Meeting/event hosted here	15%	9%	↓
Appealing advertisements	11%	7%	↓
Deal/promotion	-	2%	↓
Golf	6%	2%	↓
Wellness	1%	1%	-
Other	8%	6%	↓

[1] Multiple responses permitted.



* Visitors staying in paid accommodations.

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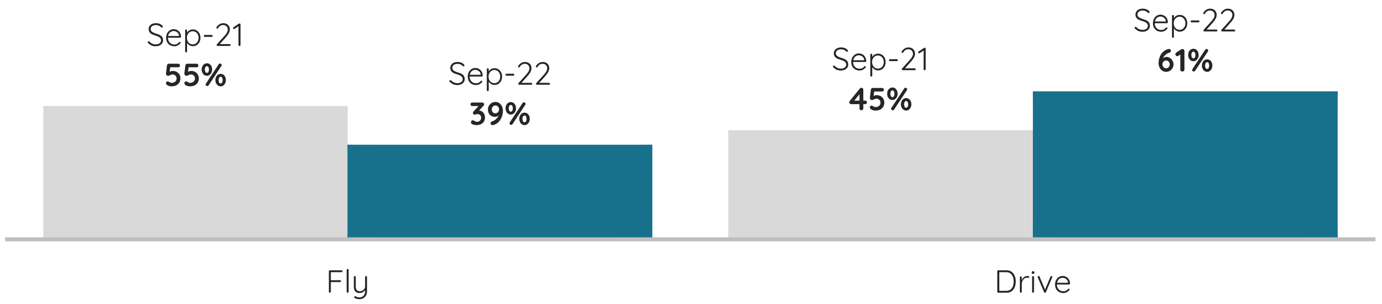
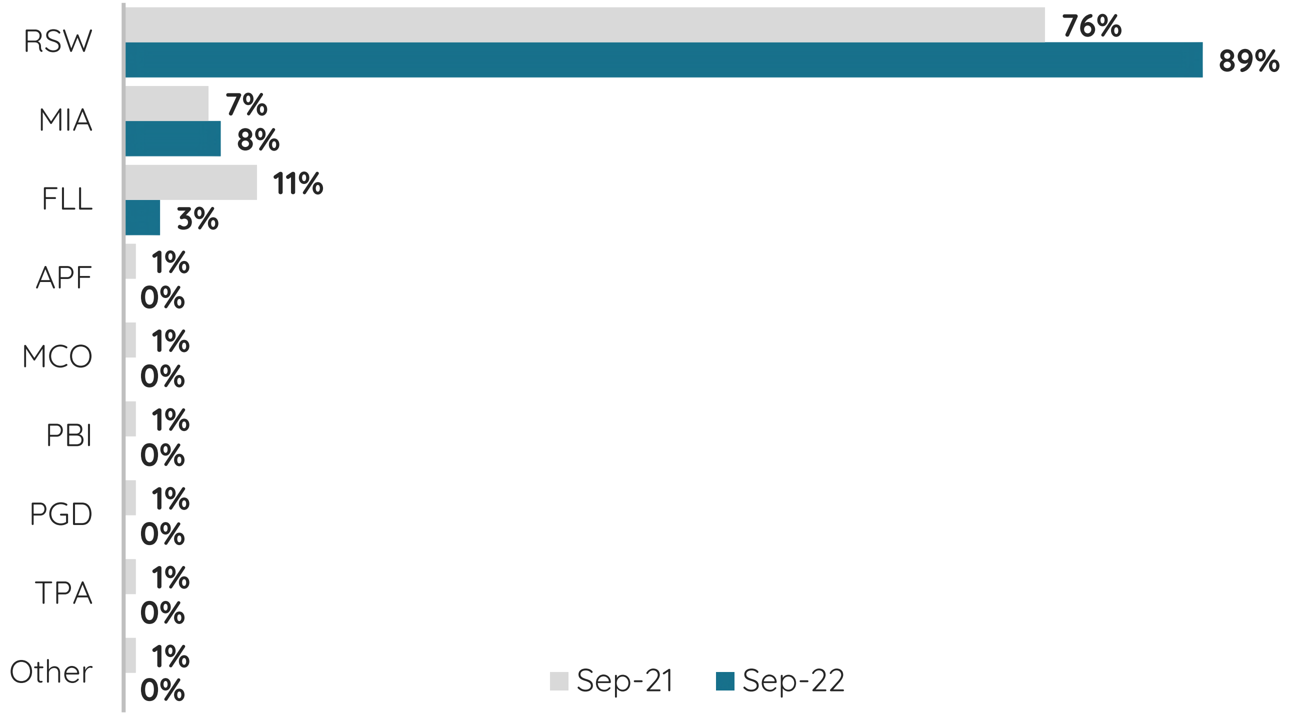
TRANSPORTATION METHODS*

NAPLES · MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

Mode of Transportation			
	Sep-21	Sep-22	Trend
Fly	55%	39%	↓
Drive	45%	61%	↑



Airport Deplaned (Base: Fly)			
	Sep-21	Sep-22	Trend
SWFL Intl Airport (RSW)	76%	89%	↑
Miami Intl Airport (MIA)	7%	8%	↑
Ft. Lauderdale Intl Airport (FLL)	11%	3%	↓
Naples Airport (APF)	1%	0%	↓
Orlando Intl Airport (MCO)	1%	0%	↓
Palm Beach Intl (PBI)	1%	0%	↓
Punta Gorda Airport (PGD)	1%	0%	↓
Tampa Intl Airport (TPA)	1%	0%	↓
Other	1%	0%	↓



* Visitors staying in paid accommodations.

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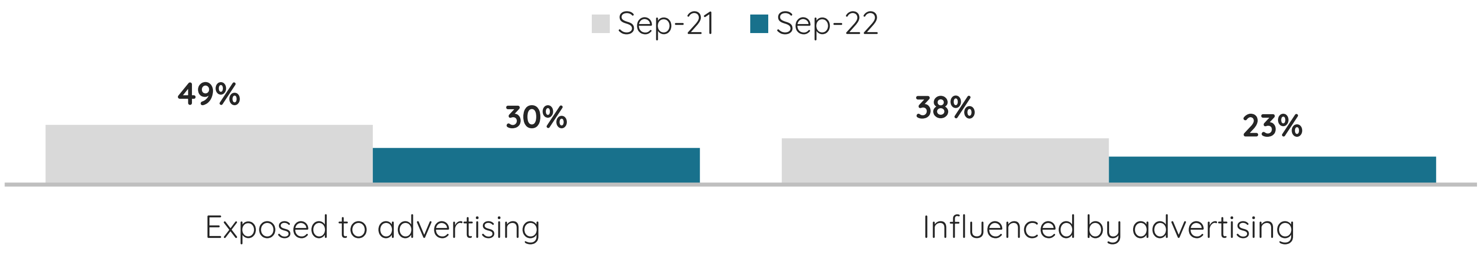
EXPOSURE TO ADVERTISING*

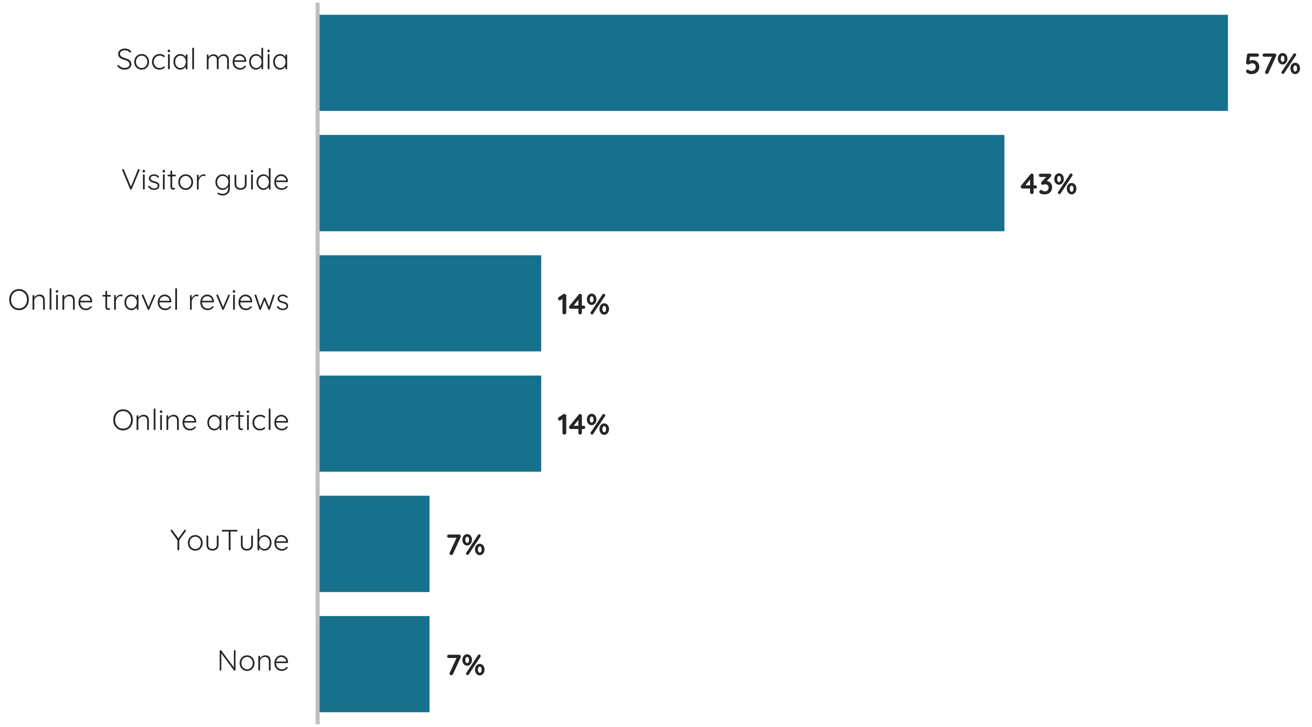
Advertising Exposure & Influence			
	Sep-21	Sep-22	Trend
Exposed to advertising	49%	30%	↓
Influenced by advertising	38%	23%	↓



Top Advertising Sources Noticed[1]			
	Sep-21	Sep-22	Trend
Social media	-	57%	-
Visitor guide	-	43%	-
Online article	-	14%	-
Online travel reviews	-	14%	-
YouTube	-	7%	-
None	-	7%	-

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

Base: 30% who saw/read/heard ads

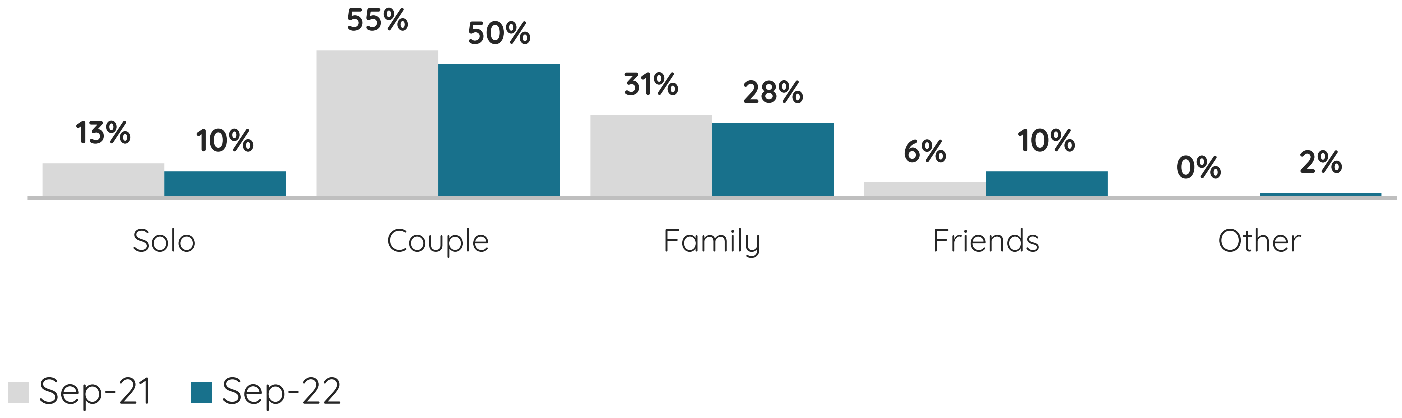


* Visitors staying in paid accommodations.

TRAVEL PARTIES*

Average Visitors per Travel Party			
	Sep-21	Sep-22	Trend
Average travel party size	2.9	3.0	↑

Travel Party Composition			
	Sep-21	Sep-22	Trend
Solo	13%	10%	↓
Couple	55%	50%	↓
Family	31%	28%	↓
Friends	6%	10%	↑
Other	0%	2%	↑

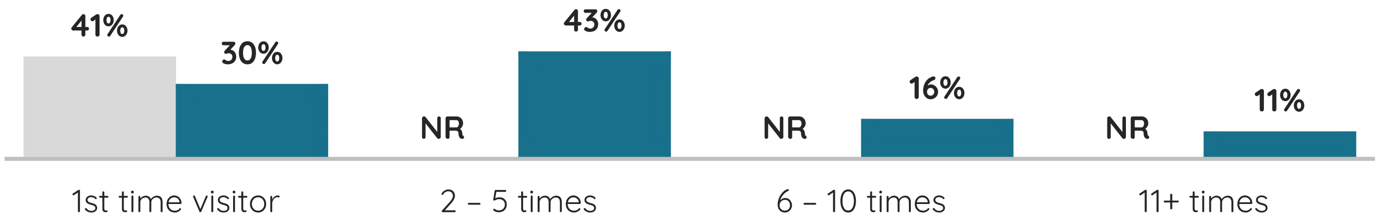


* Visitors staying in paid accommodations.

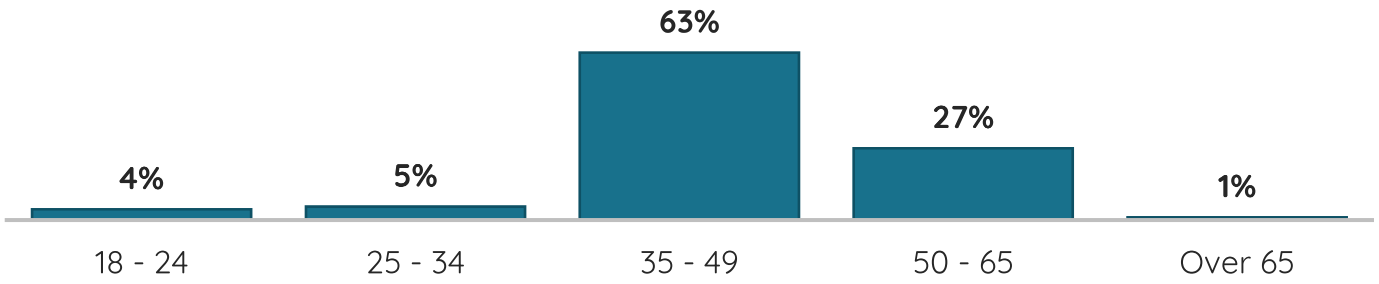
VISITING PARADISE COAST*

NAPLES · MARCO ISLAND
EVERGLADES
FLORIDA'S PARADISE COAST

Previous Visits	Sep-21	Sep-22	Trend
1st time visitor	41%	30%	↓
2 – 5 times	-	43%	-
6 – 10 times	-	16%	-
11+ times	-	11%	-



Typical Visitor Ages	Sep-21	Sep-22	Trend
Median Age	-	44	-
Average Age	46.0	45.1	↑



* Visitors staying in paid accommodations.

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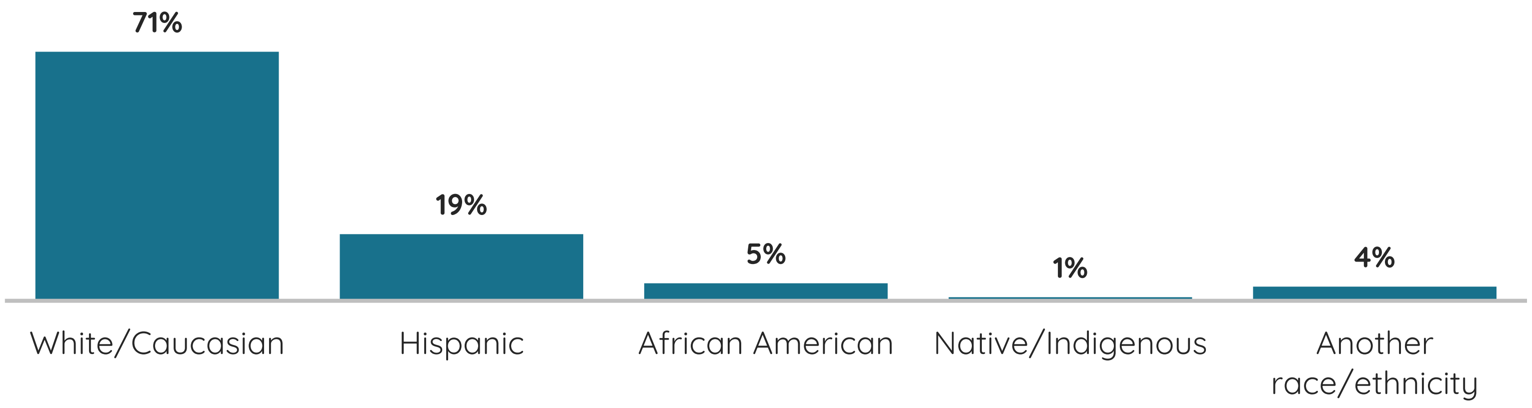
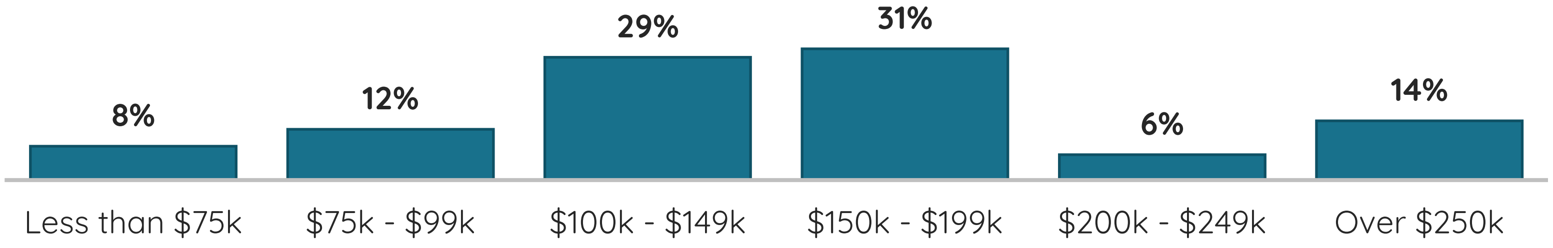
VISITOR DEMOGRAPHICS*

Race/Ethnicity			
	Sep-21	Sep-22	Trend
White/Caucasian	-	71%	-
Hispanic	-	19%	-
African American	-	5%	-
Native/Indigenous	-	1%	-
Another race/ethnicity	-	4%	-



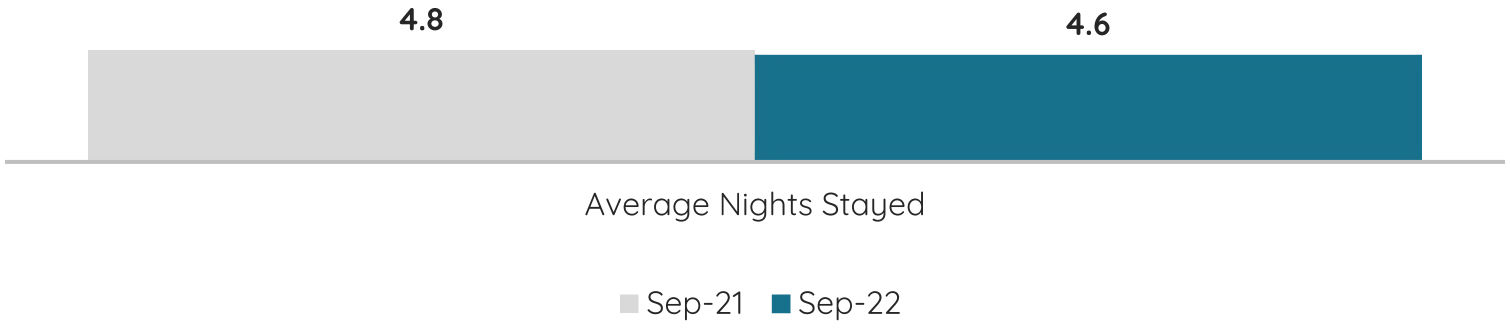
Typical Visitor Household Income			
	Sep-21	Sep-22	Trend
Median HHI	$136,100	$151,600	↑



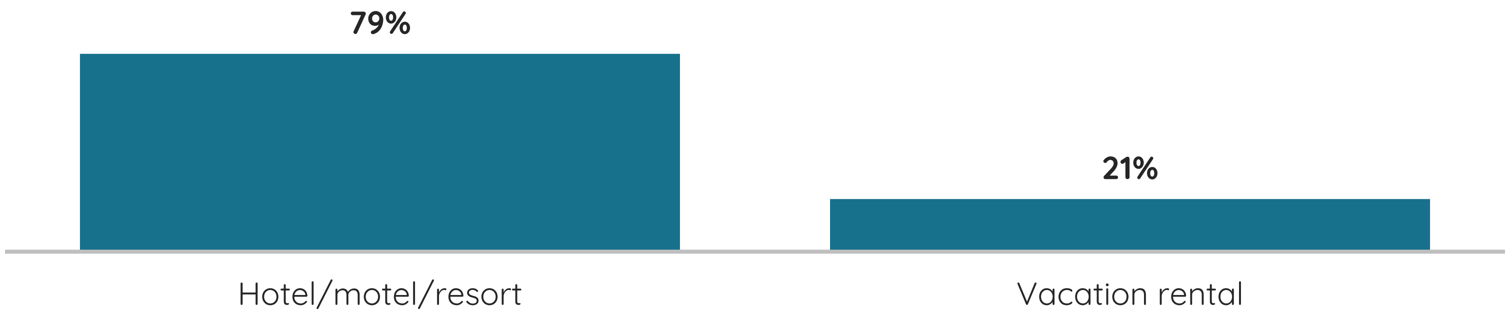
* Visitors staying in paid accommodations.

OVERNIGHT VISITS*

Nights in Destination			
	Sep-21	Sep-22	Trend
Nights Stayed (mean)	4.8	4.6	↓



Accommodations			
	Sep-21	Sep-22	Trend
Hotel/motel/resort	-	79%	-
Vacation rental	-	21%	-



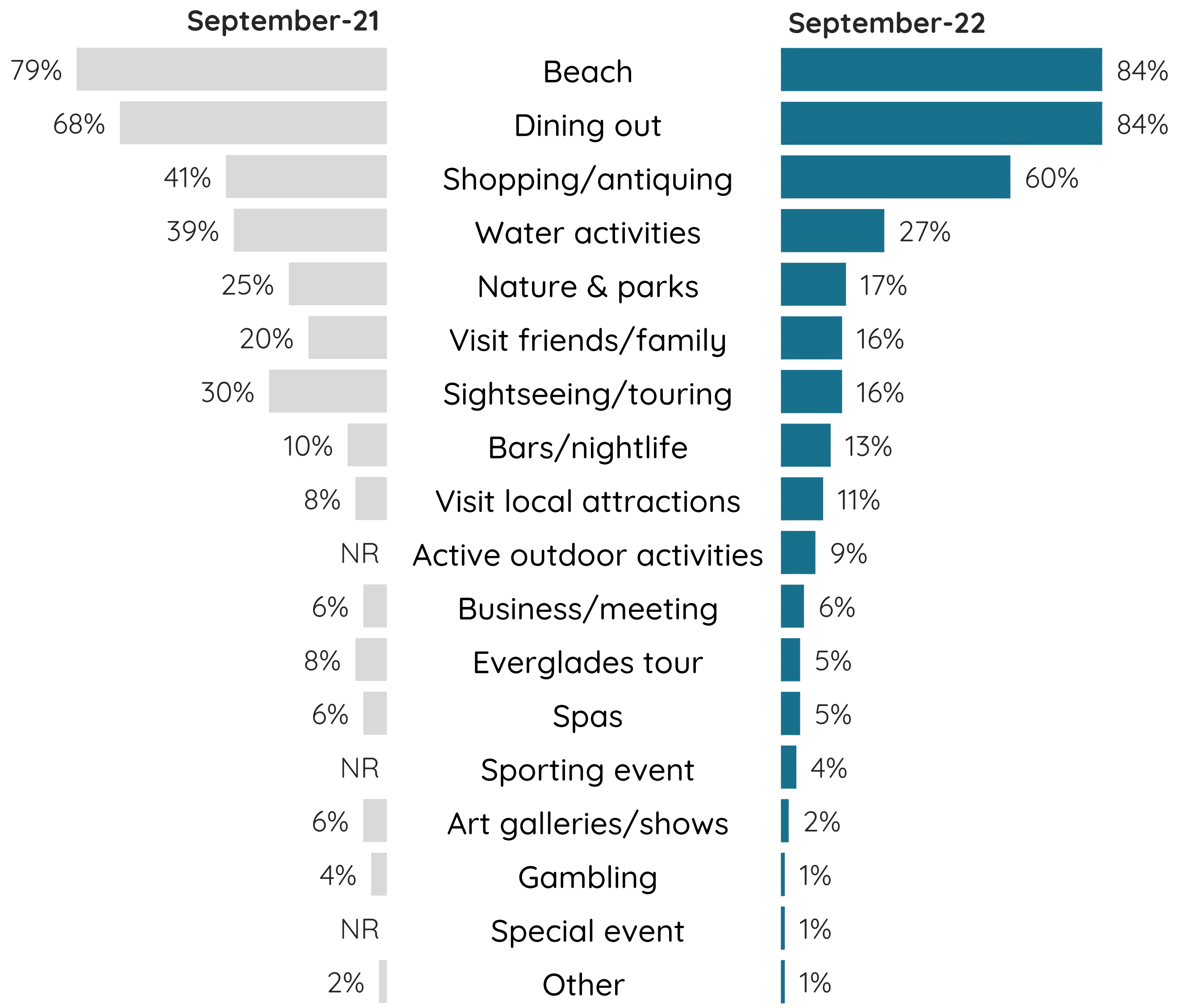
* Visitors staying in paid accommodations.

TRIP ACTIVITIES*

NAPLES • MARCO ISLAND EVERGLADES
FLORIDA'S PARADISE COAST

Trip Activities[1]			
	Sep-21	Sep-22	Trend
Beach	79%	84%	↑
Dining out	68%	84%	↑
Shopping/antiquing	41%	60%	↑
Water activities	39%	27%	↓
Nature & parks	25%	17%	↓
Visit friends/family	20%	16%	↓
Sightseeing/touring	30%	16%	↓
Bars/nightlife	10%	13%	↑
Visit local attractions	8%	11%	↑
Active outdoor activities	-	9%	-
Business/meeting	6%	6%	-
Everglades tour	8%	5%	↓
Spas	6%	5%	↓
Sporting event	-	4%	-
Art galleries/shows	6%	2%	↓
Gambling	4%	1%	↓
Special event	-	1%	-
Other	2%	1%	↓

[1] Multiple responses permitted.



* Visitors staying in paid accommodations.

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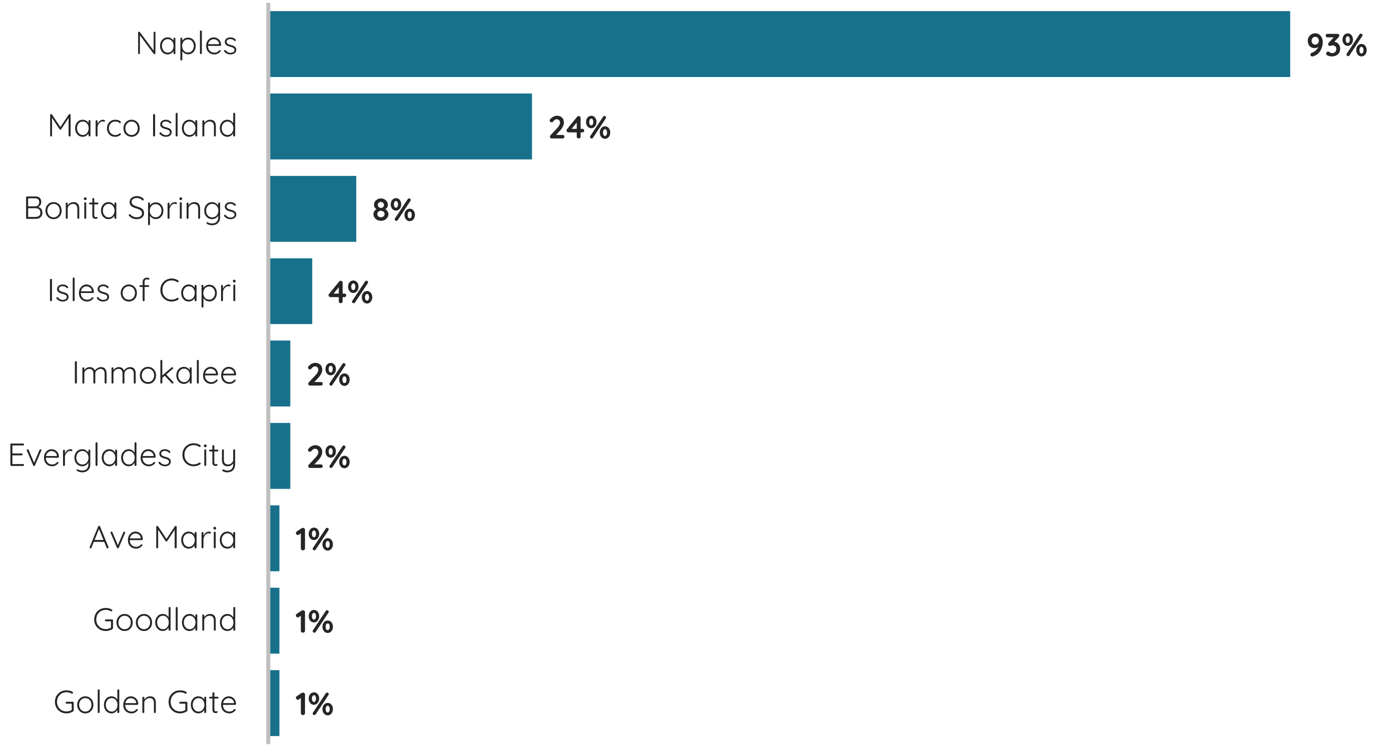
AREAS VISITED*

Areas Visited in Destination[1]			
	Sep-21	Sep-22	Trend
Naples	-	93%	-
Marco Island	-	24%	-
Bonita Springs	-	8%	-
Isles of Capri	-	4%	-
Everglades City	-	2%	-
Immokalee	-	2%	-
Ave Maria	-	1%	-
Goodland	-	1%	-
Golden Gate	-	1%	-

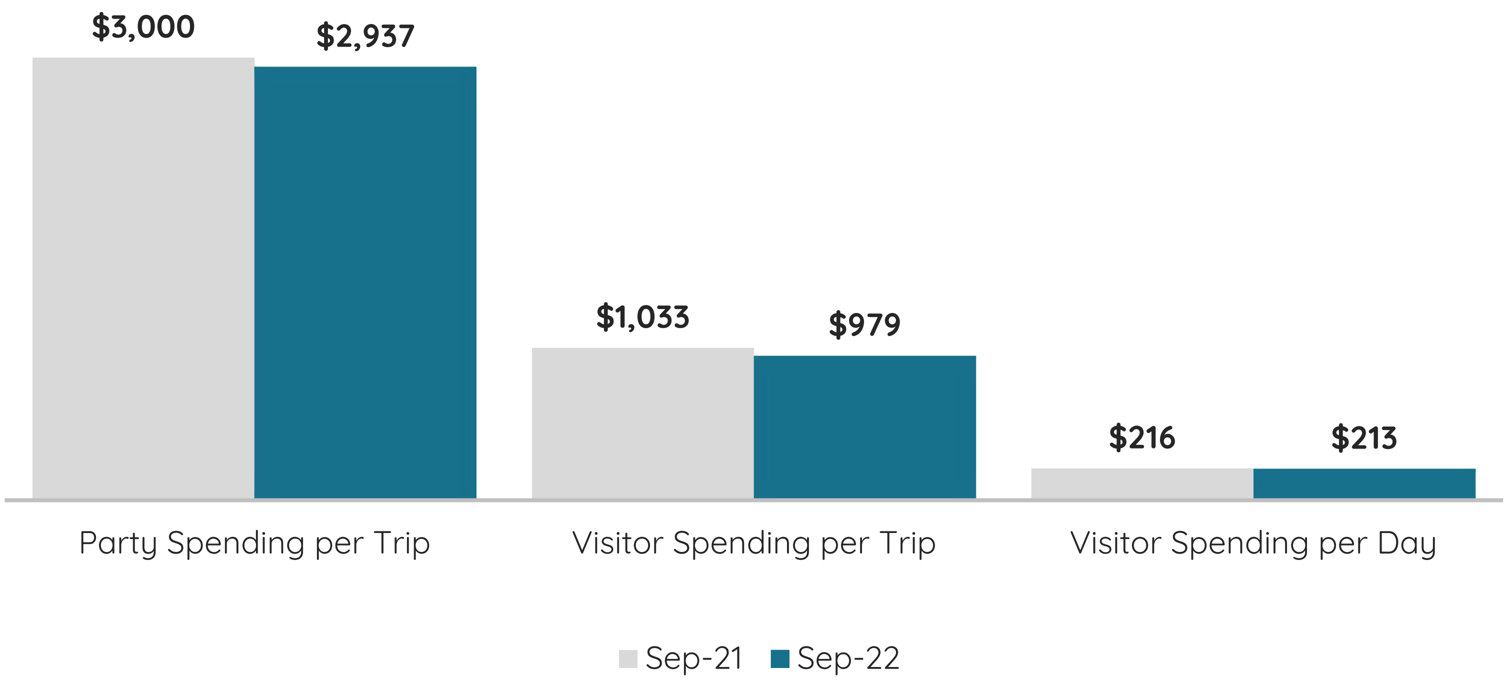
[1] Multiple responses permitted.



* Visitors staying in paid accommodations.

VISITOR SPENDING*

Visitor Spending			
	Sep-21	Sep-22	Trend
Party Spending per Trip	$3,000	$2,937	↓
Visitor Spending per Trip	$1,033	$979	↓
Visitor Spending per Day	$216	$213	↓

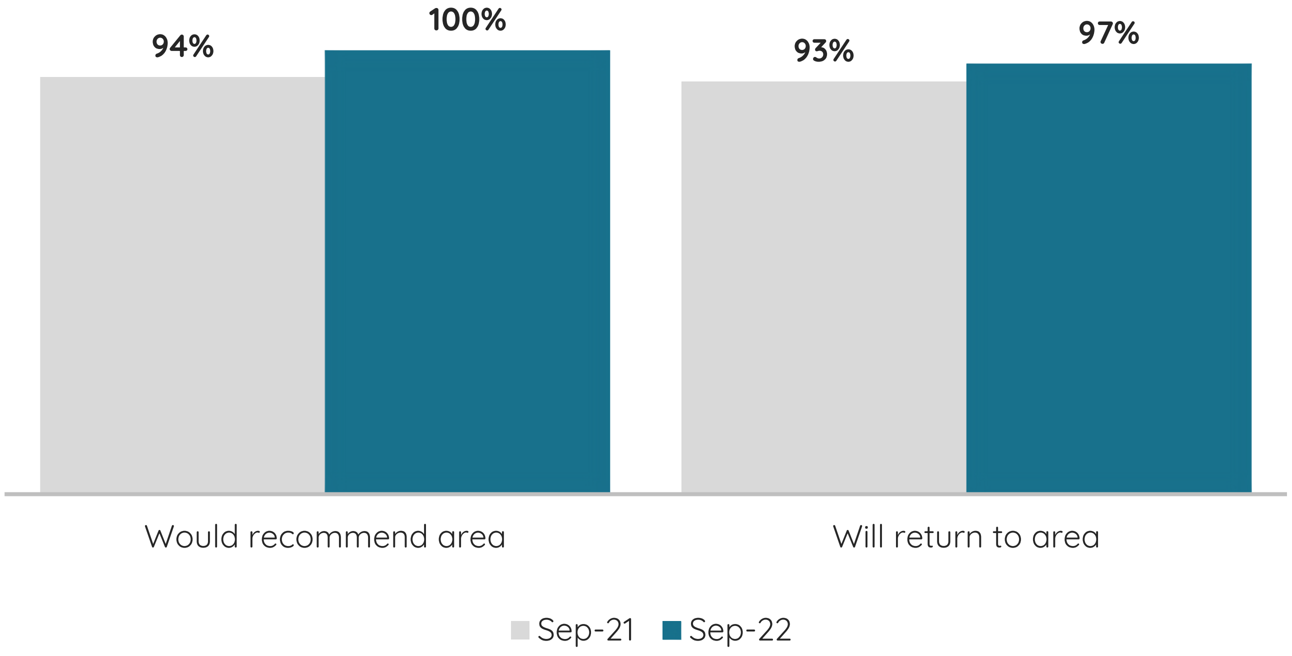


* Visitors staying in paid accommodations.

TRIP EVALUATIONS*

Satisfaction with Destination			
	Sep-21	Sep-22	Trend
Value for travel dollar[1]	-	9.4	-
Would recommend area	94%	100%	↑
Will return to area	93%	97%	↑

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

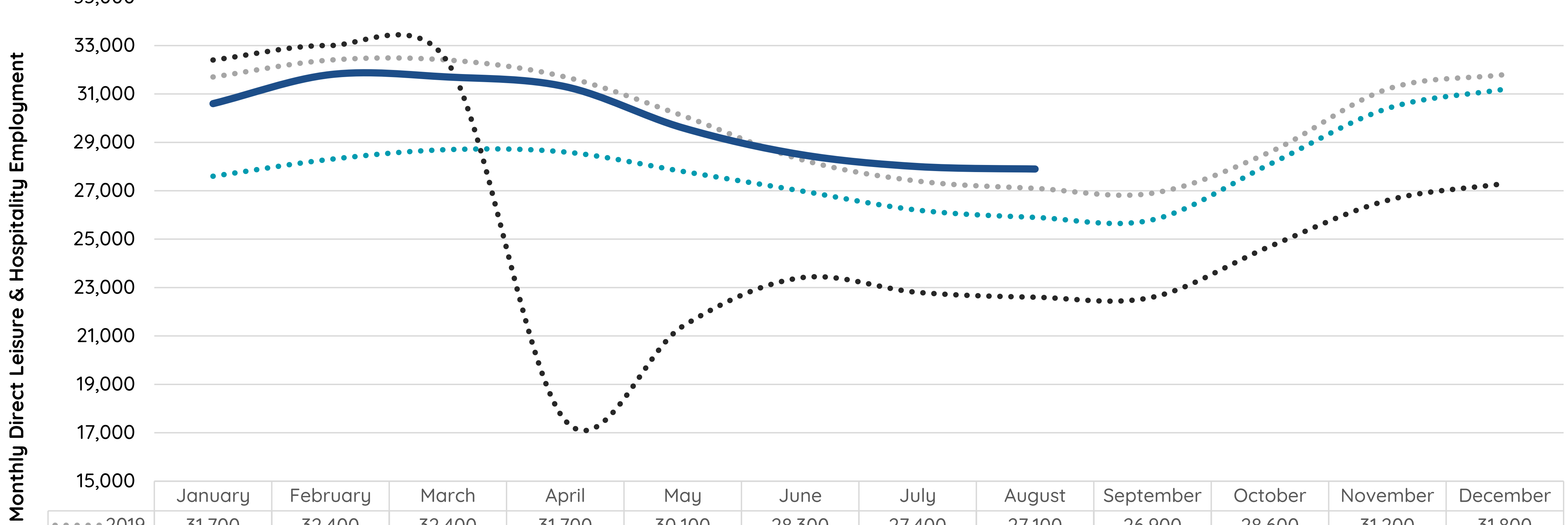


* Visitors staying in paid accommodations.

INDUSTRY DATA

LEISURE & HOSPITALTY EMPLOYMENT

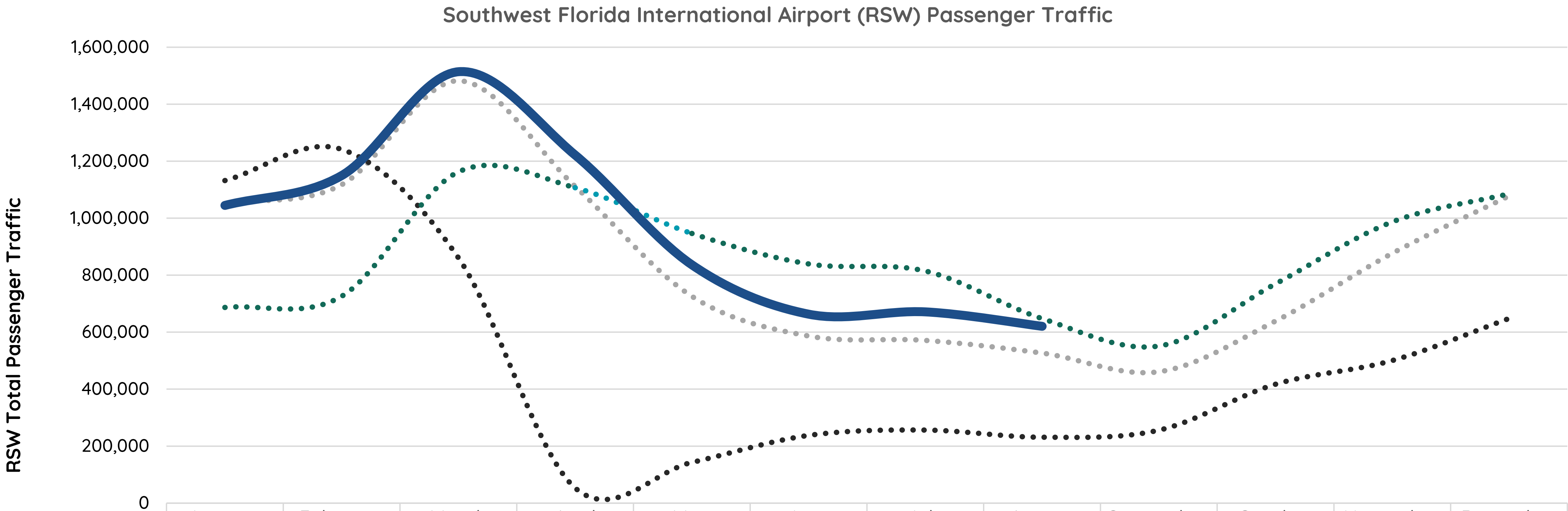
Collier County Direct Leisure and Hospitality Employment (Calendar Year)[1]



	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	28,500	28,000	27,900 (P)				

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

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	671,225	620,532				

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

LICENSED TRANSIENT RENTAL UNITS

September 2022 Licensed Transient Rental Units[1]				
	Hotel	Motel	Vacation Rental	Total
Naples	4,452	1,557	3,182	9,191
Marco Island	1,275	115	1,822	3,212
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
Total	**5,765**	**1,936**	**5,195**	**12,897**[2]

[1] SOURCE: Florida Department of Business & Professional Regulation.
[2] Not all units were available for the entirety of September due to Hurricane Ian.

NAPLES, MARCO ISLAND, EVERGLADES

Convention & Visitors Bureau

September 2022 Monthly Dashboard

Paul Beirnes, Executive Director
paul.beirnes@colliercountyfl.gov

Downs & St. Germain Research
(850) 906-3111 | contact@dsg-research.com