NAPLES · MARCO ISLAND EVERGLADES℠

FLORIDA'S PARADISE COAST

March 2024 Monthly Visitor Dashboard

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MONTHLY SNAPSHOT

MARCH 2024 | MONTHLY SNAPSHOT

- In March 2024, overall occupancy rate increased 0.8% compared to March 2023.
- However, the average daily rate (ADR) saw a massive year-over-year jump, increasing by 30.4%, which pushed revenue per available room (RevPAR) to $388.
- Average length of stay and average travel party size both increased slightly, going from 7.0 to 7.3 and from 2.9 to 3.0, respectively.
- Direct spending by visitors and total economic impact of tourism increased by 10.9% and 10.8%, respectively, with nearly all of the increased being accounted for by the elevated average daily rate.
- Spending in other categories such as restaurants, shopping, entertainment, and transportation saw little or no year-over-year growth, and some categories displayed slight year-over-year declines in spending.
- The Midwest & the Northeast continued to be the main regions of origin for visitors to Collier County, accounting for nearly 3 in 5 visitors. International origins such as Germany, the United Kingdom, and others accounted for 11% of all visitors in March 2024.

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2a

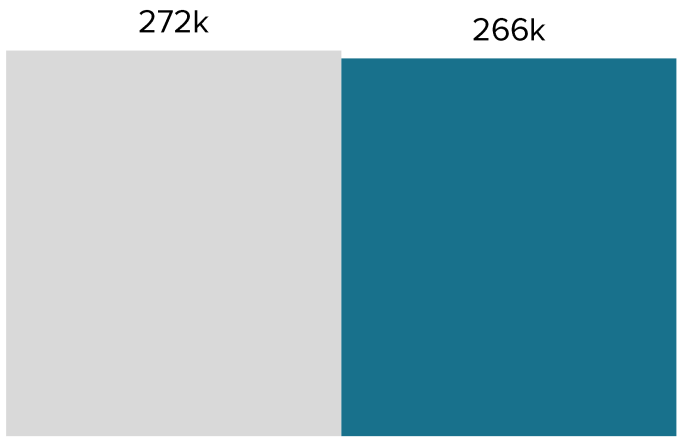
EXECUTIVE MONTHLY SUMMARY

MARCH 2024 | VISITATION & ROOM NIGHTS

downs & st. germain RESEARCH

VISITORS

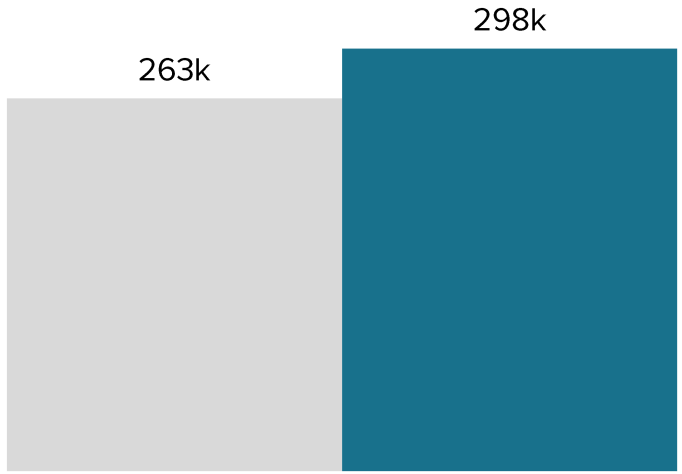
266,200



- 2.0% from 2023

ROOM NIGHTS

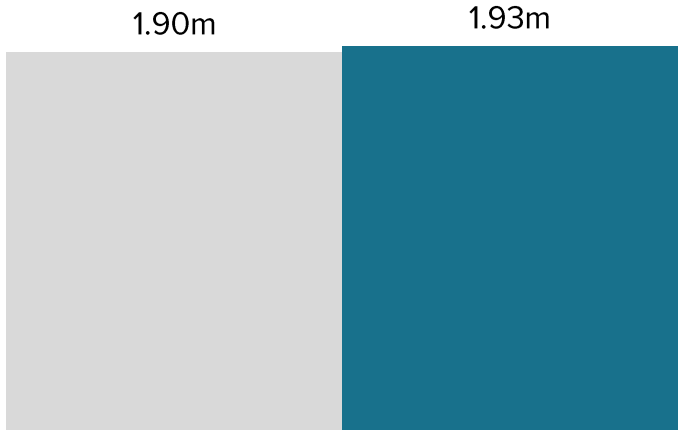
297,800



+ 13.4% from 2023

VISITOR DAYS

1,932,600



+ 1.6% from 2023

Mar-23 Mar-24

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MARCH 2024 | SPENDING & ECONOMIC IMPACT[1]

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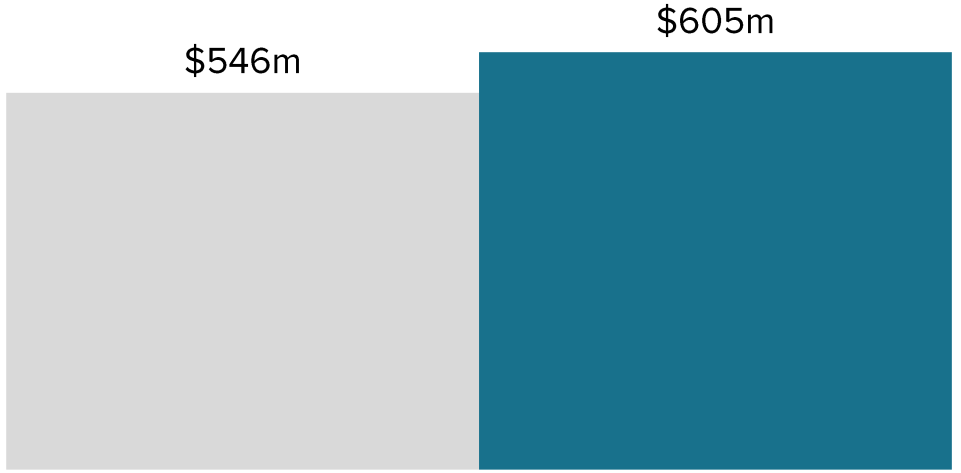
DIRECT SPENDING

$436,172,100

+ **10.9%** from 2023

ECONOMIC IMPACT

$604,534,500



+ **10.8%** from 2023

Mar-23 Mar-24

[1] The IMPLAN multiplier for Collier County was 1.388 for 2023 and is 1.386 in 2024.

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MARCH 2024 | OVERALL LODGING METRICS[1]

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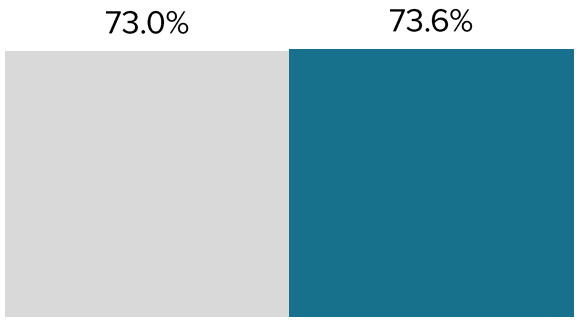
OCCUPANCY RATE

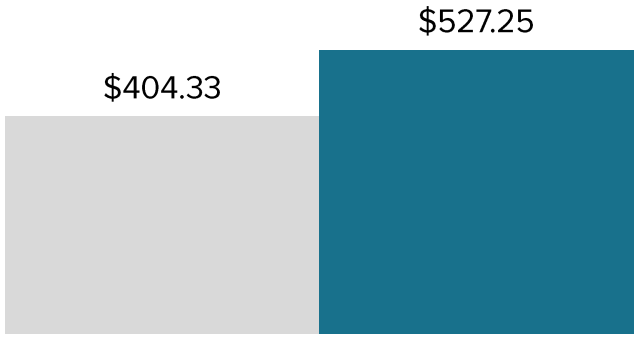
73.6%



+ **0.8%** from 2023

AVERAGE DAILY RATE

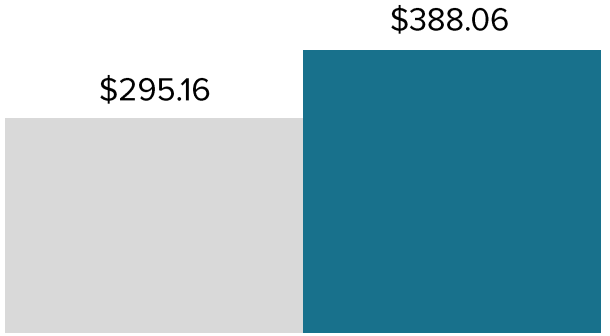
$527.25



+ **30.4%** from 2023

REVENUE PER AVAILABLE ROOM

$388.06



+ **31.5%** from 2023

Mar-23 Mar-24

[1] Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

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MARCH 2024 | HOTEL LODGING METRICS[1]

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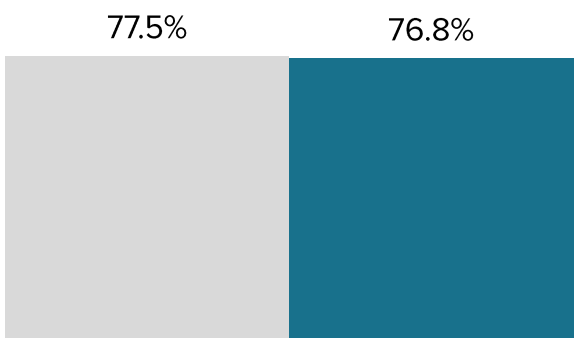
OCCUPANCY RATE

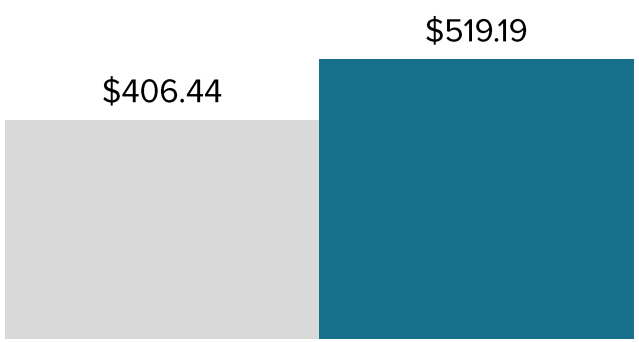
76.8%



- 0.8% from 2023

AVERAGE DAILY RATE

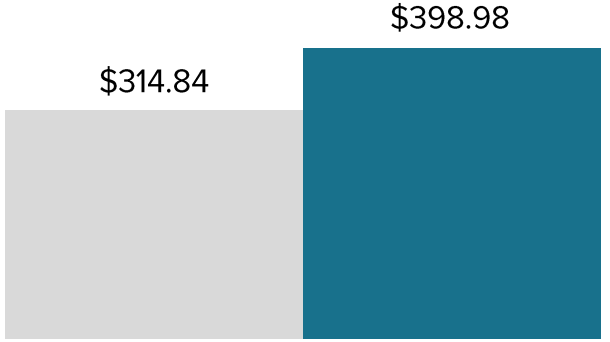
$519.19



+ 27.7% from 2023

REVENUE PER AVAILABLE ROOM

$398.98



+ 26.7% from 2023

Mar-23 Mar-24

[1] Source: STR Reports

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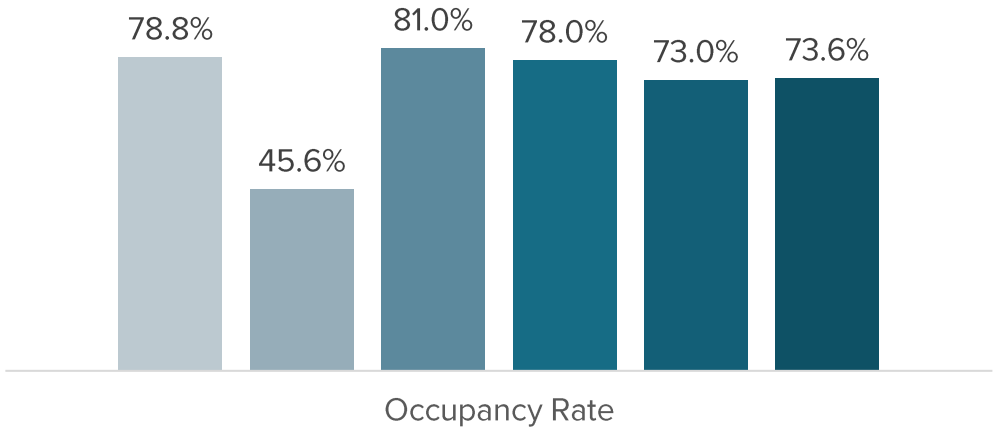
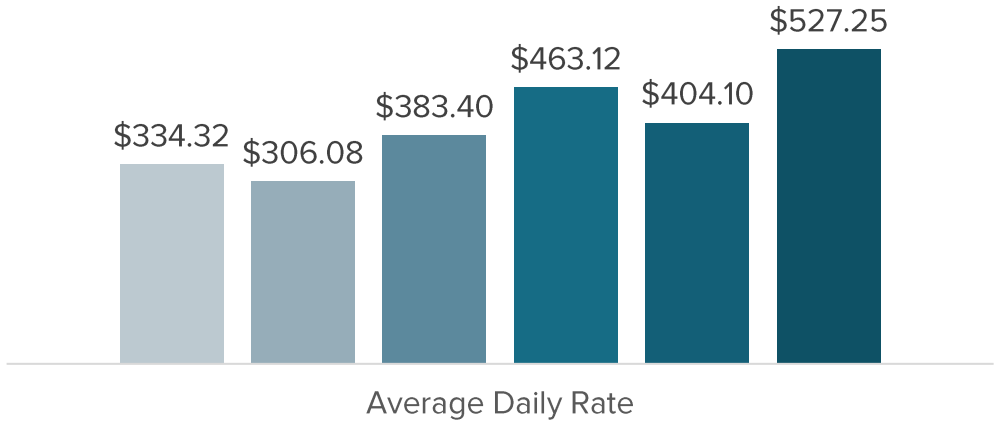
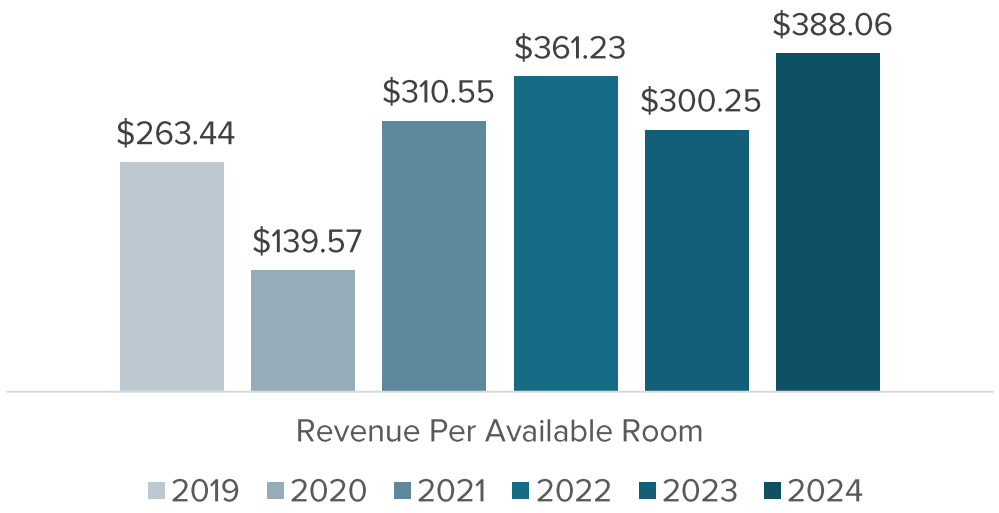
MARCH | OVERALL LODGING METRICS TREND[1]







[1] Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

MARCH 2024 | VISITOR ORIGIN

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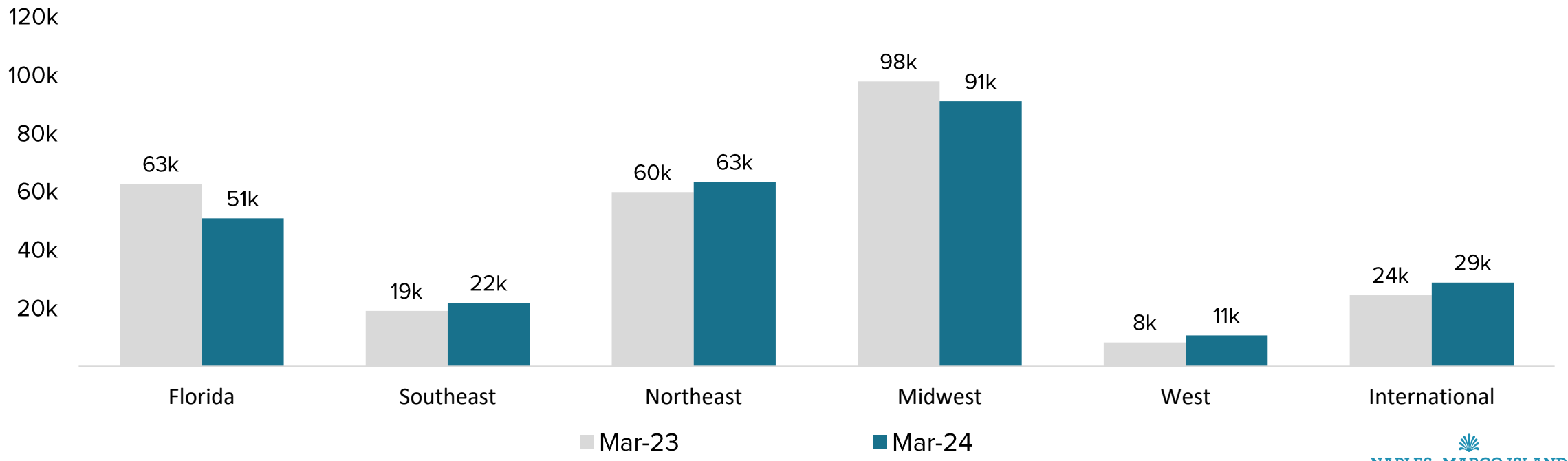
FLORIDA VISITORS

50,800

OUT-OF-STATE VISITORS

215,400



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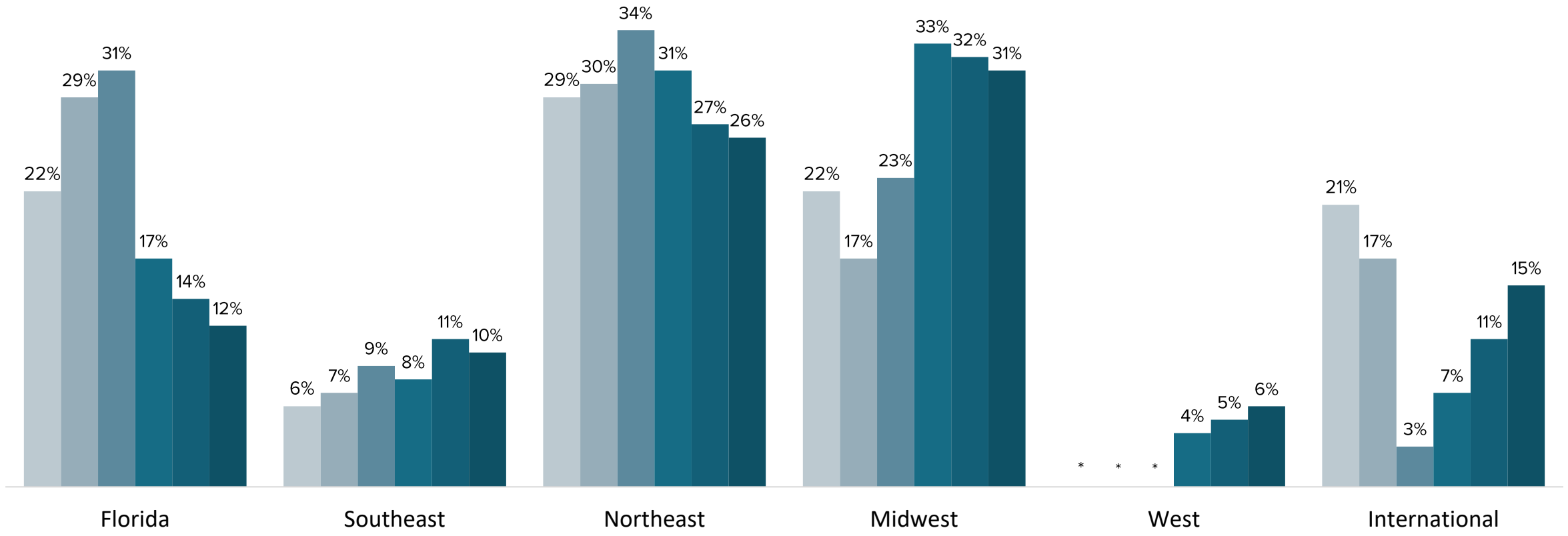
MARCH | OVERNIGHT VISITOR ORIGIN TREND



*Note: The "West" was not separated from "Other" before March 2022. Beginning in March 2022, "West" was added and "Other" was changed to "Other International".

2b

EXECUTIVE FISCAL YEAR-TO-DATE (FYTD) SUMMARY

FYTD | VISITATION METRICS

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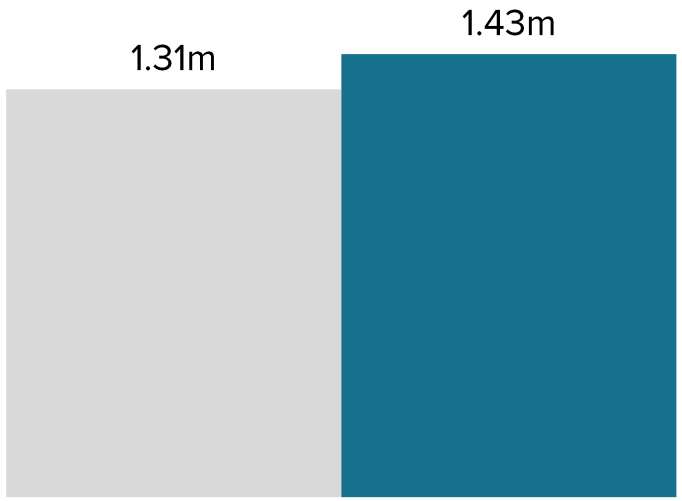
FYTD VISITORS

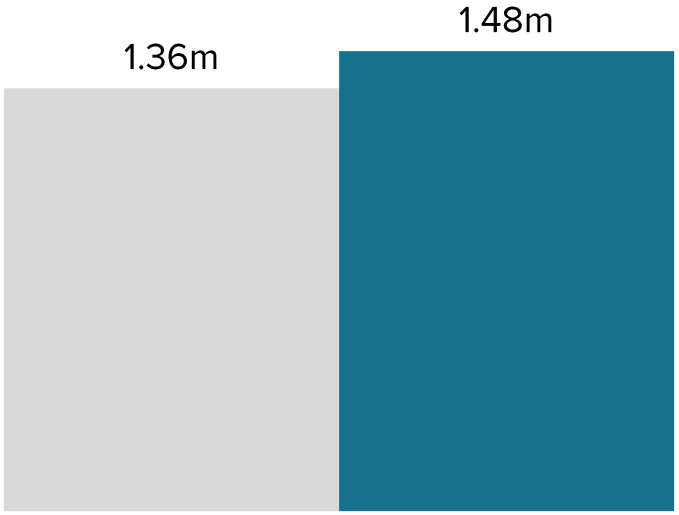
1,427,500



+ **8.6%** from FY23

FYTD ROOM NIGHTS

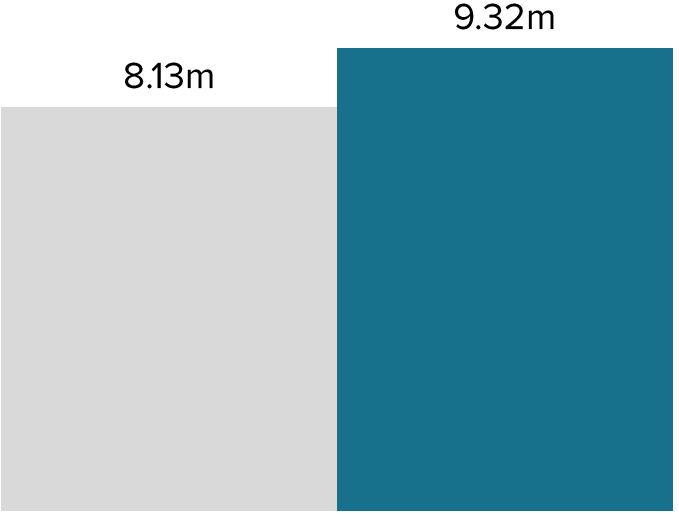
1,481,900



+ **8.8%** from FY23

FYTD VISITOR DAYS

9,317,500



+ **14.7%** from FY23

FY23 FY24

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FYTD | SPENDING & ECONOMIC IMPACT

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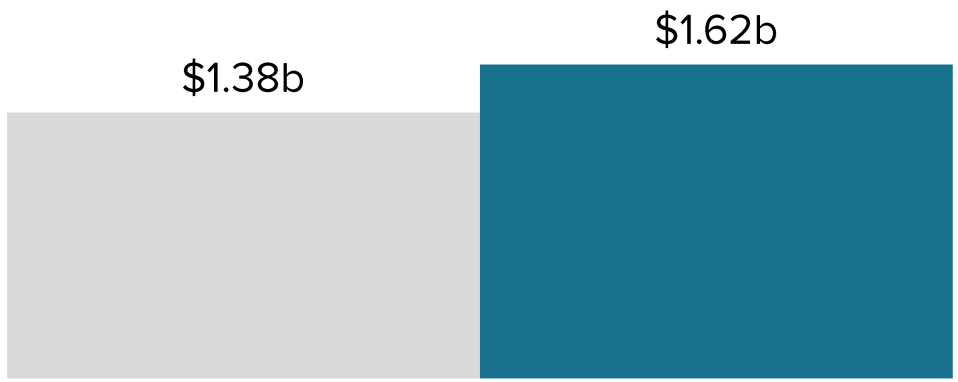
FYTD DIRECT SPENDING

$1,623,294,700

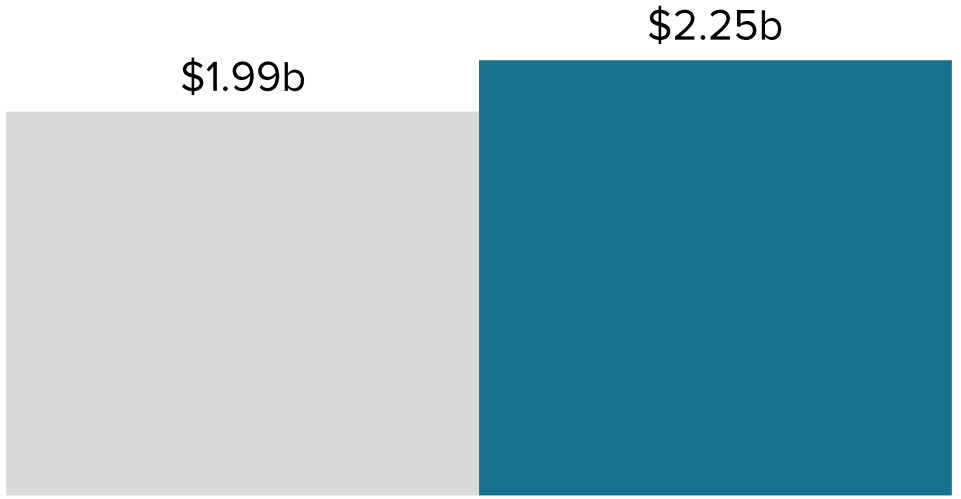
+ 18.0% from FY23



FYTD ECONOMIC IMPACT

$2,251,079,000

+ 13.4% from FY23[1]



FY23 FY24

[1] The IMPLAN multiplier for Collier County was 1.388 for 2022 and is 1.386 in 2023.

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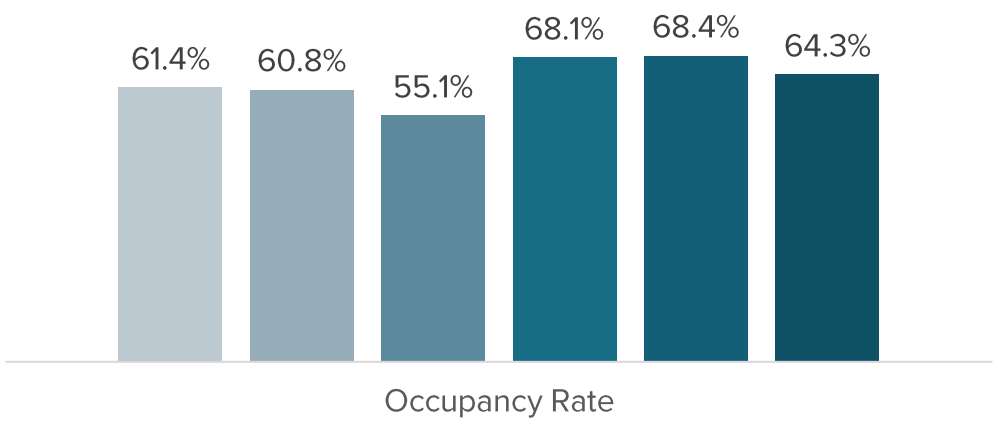
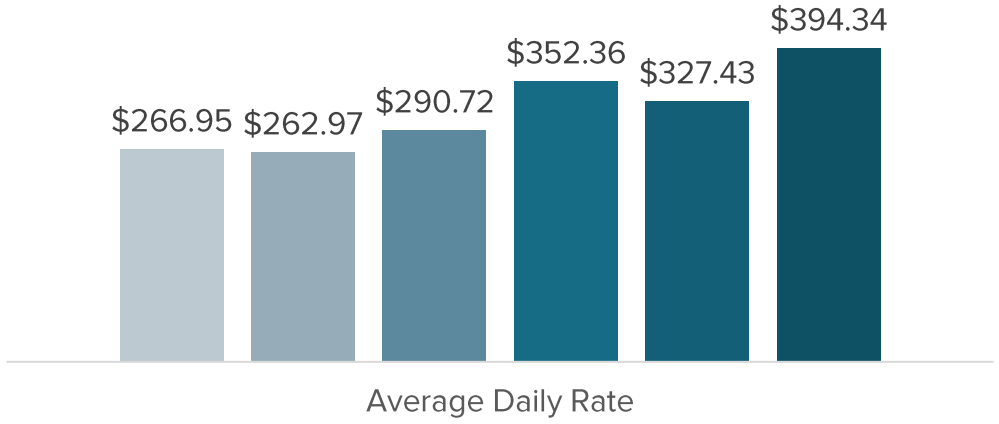
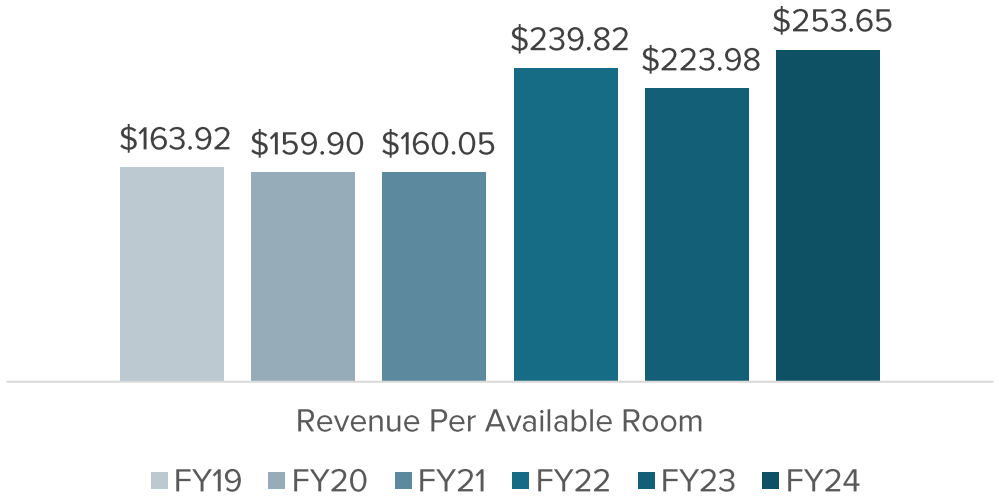
FYTD | 2019-2024 OVERALL LODGING METRICS[1]

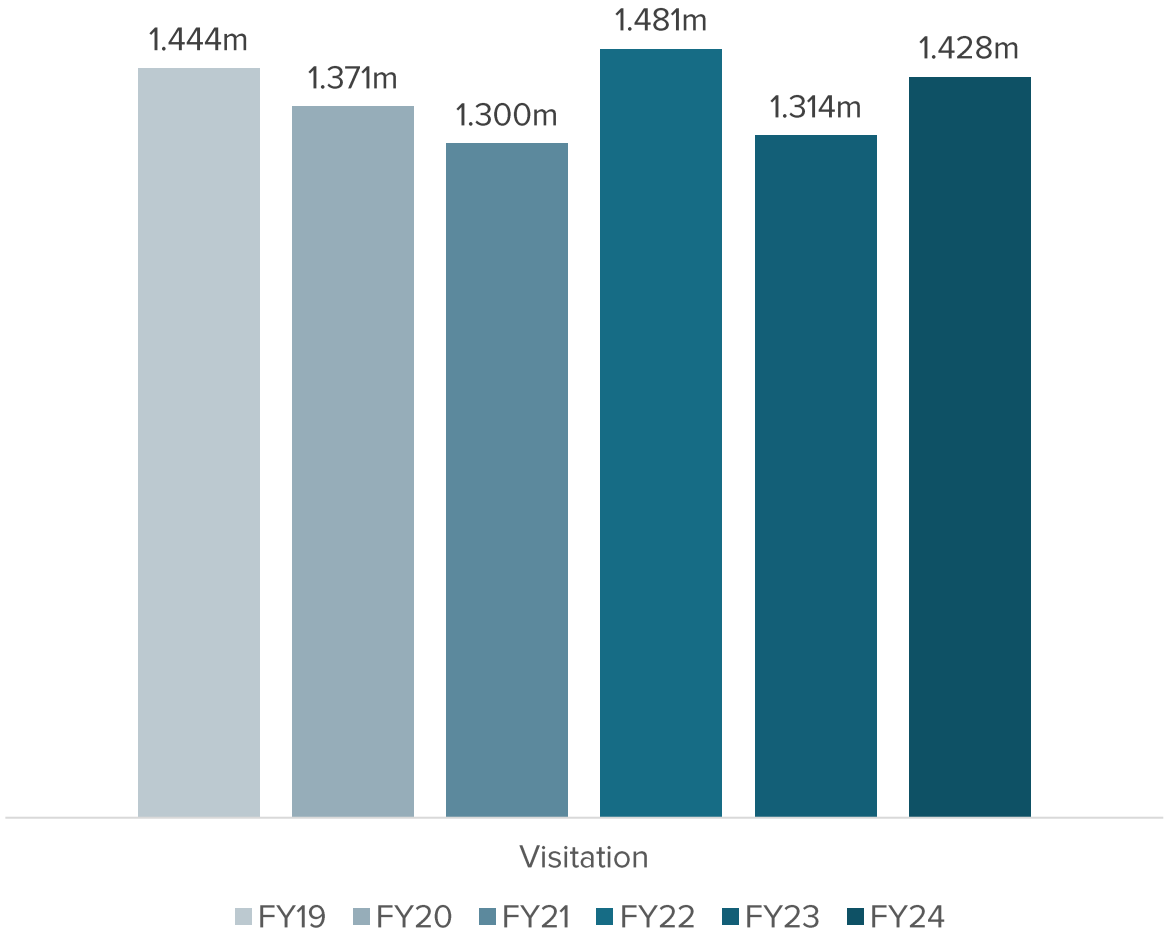


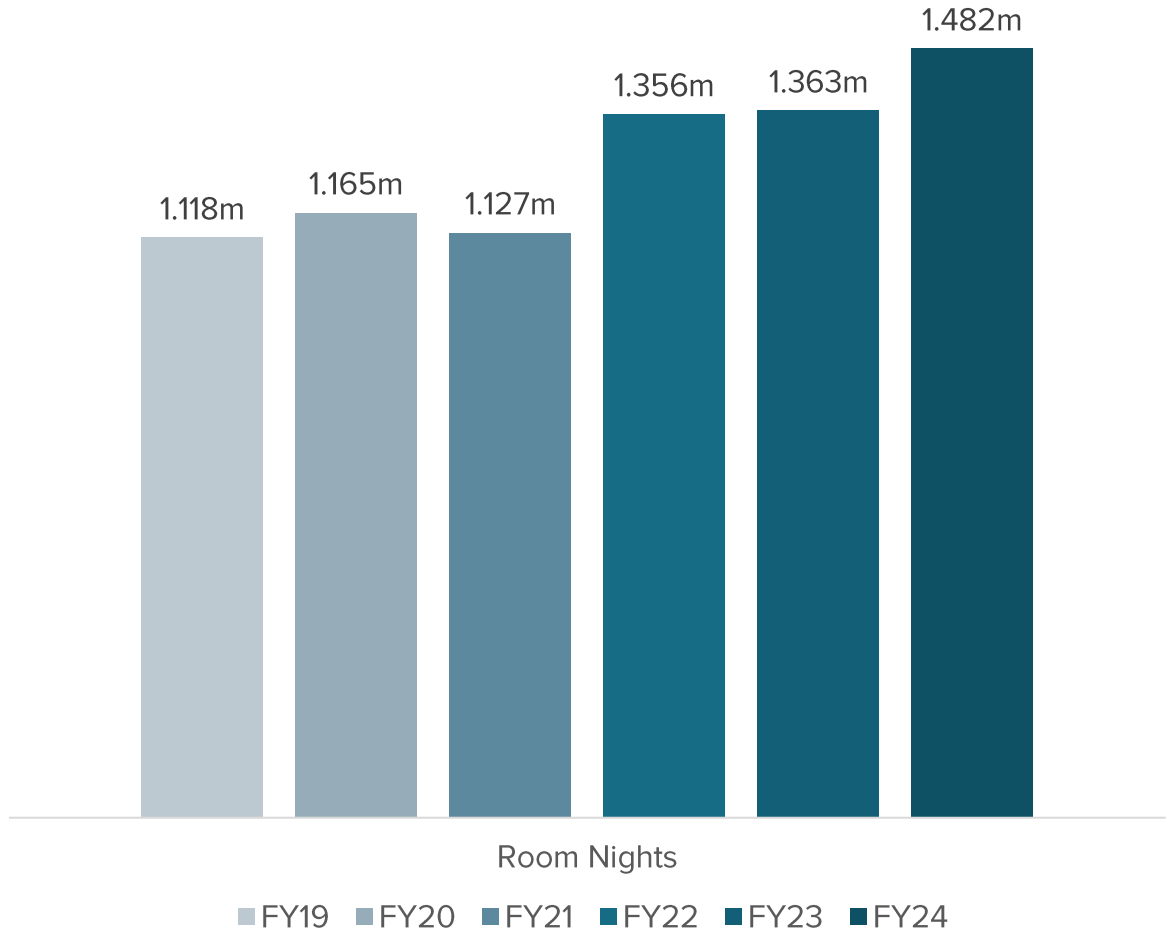




[1] Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

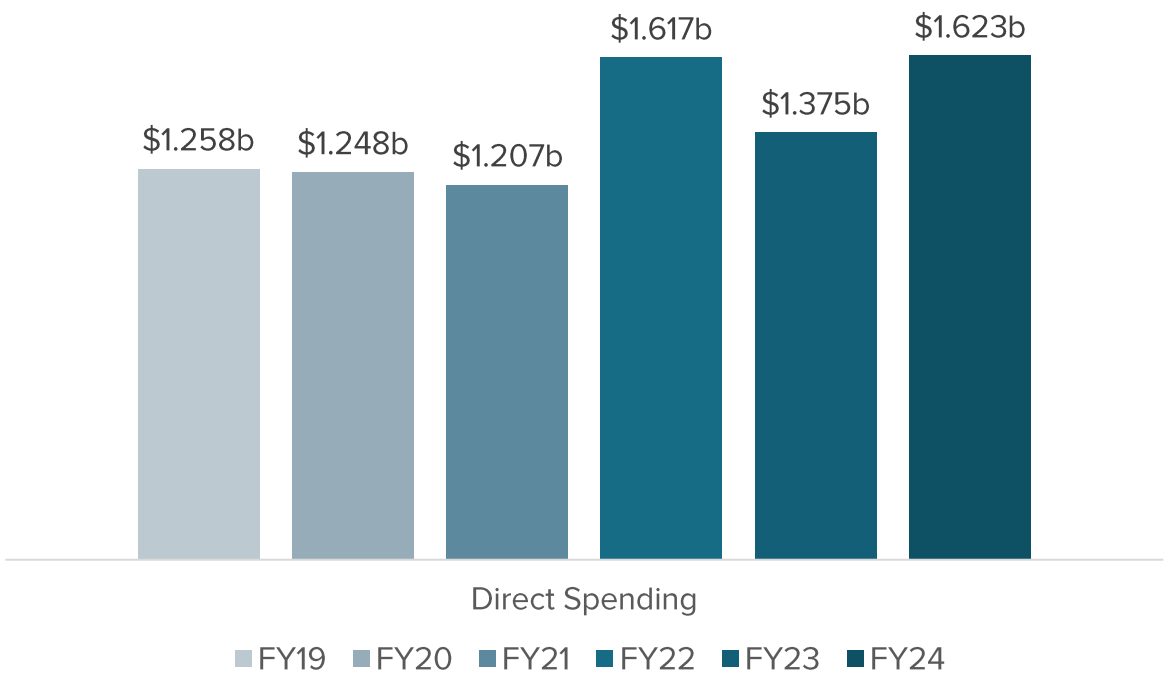
FYTD | 2019-2024 VISITATION & ROOM NIGHTS[1]

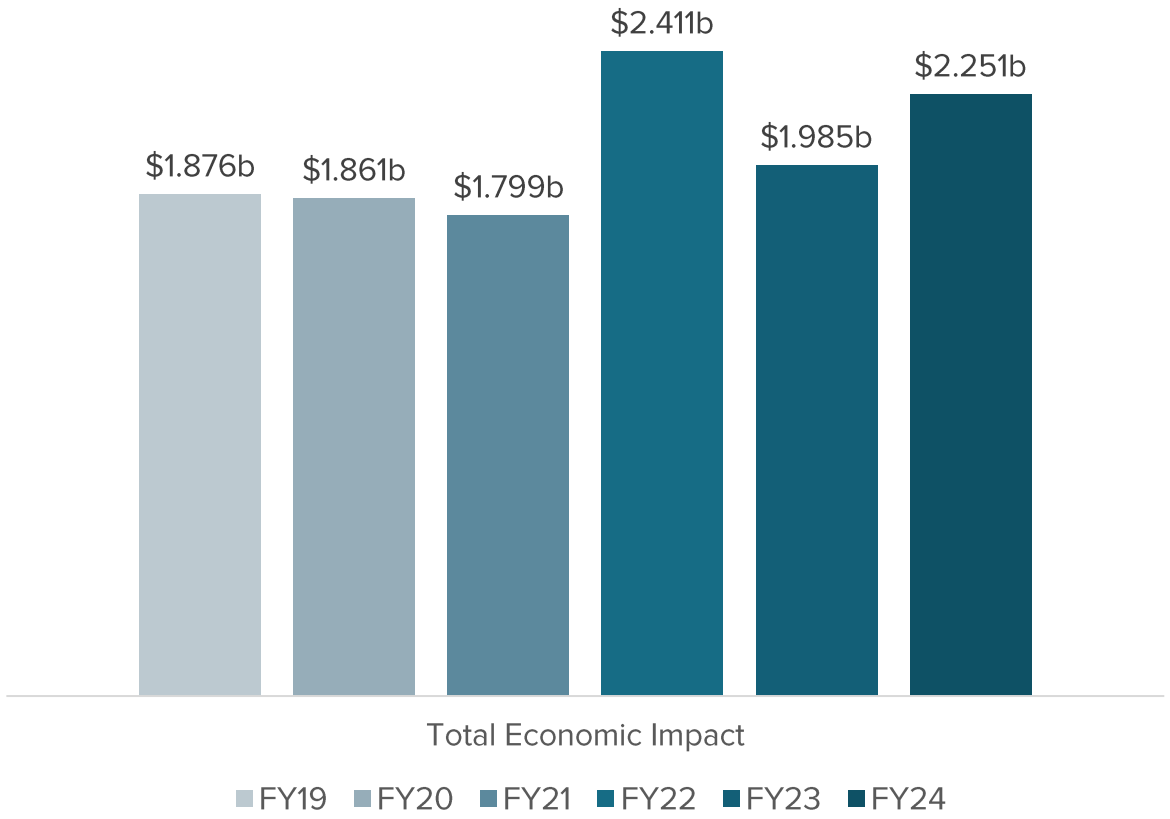




[1] Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

FYTD | 2019-2024 SPENDING & ECONOMIC IMPACT[1]





[1] Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

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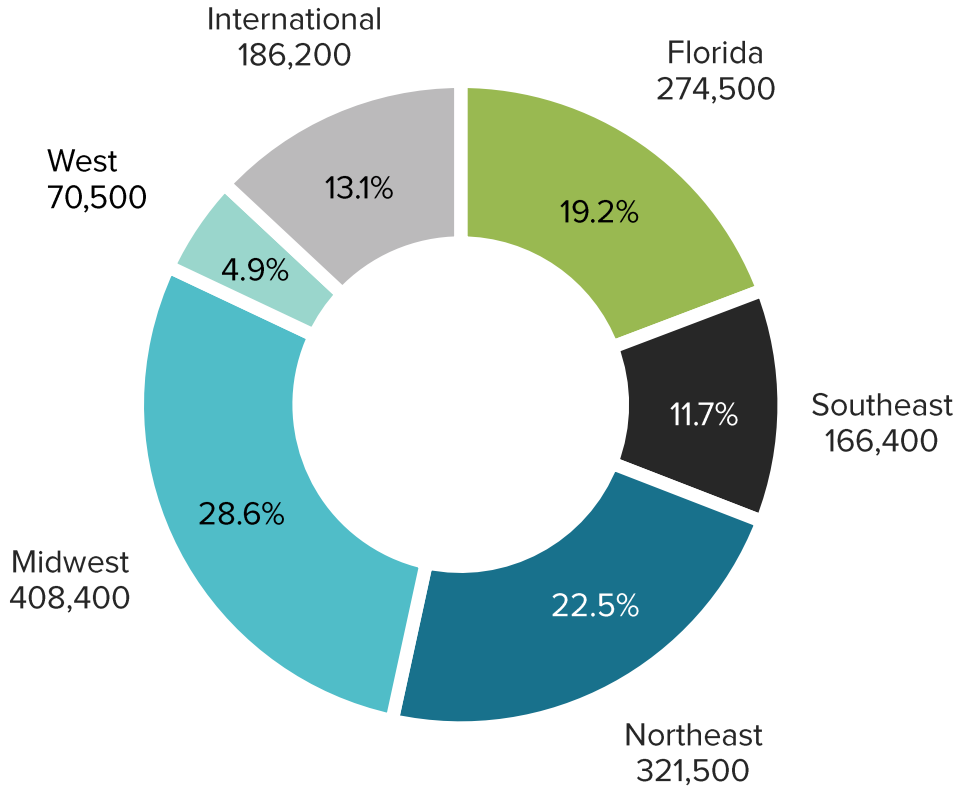
FYTD | VISITOR ORIGIN

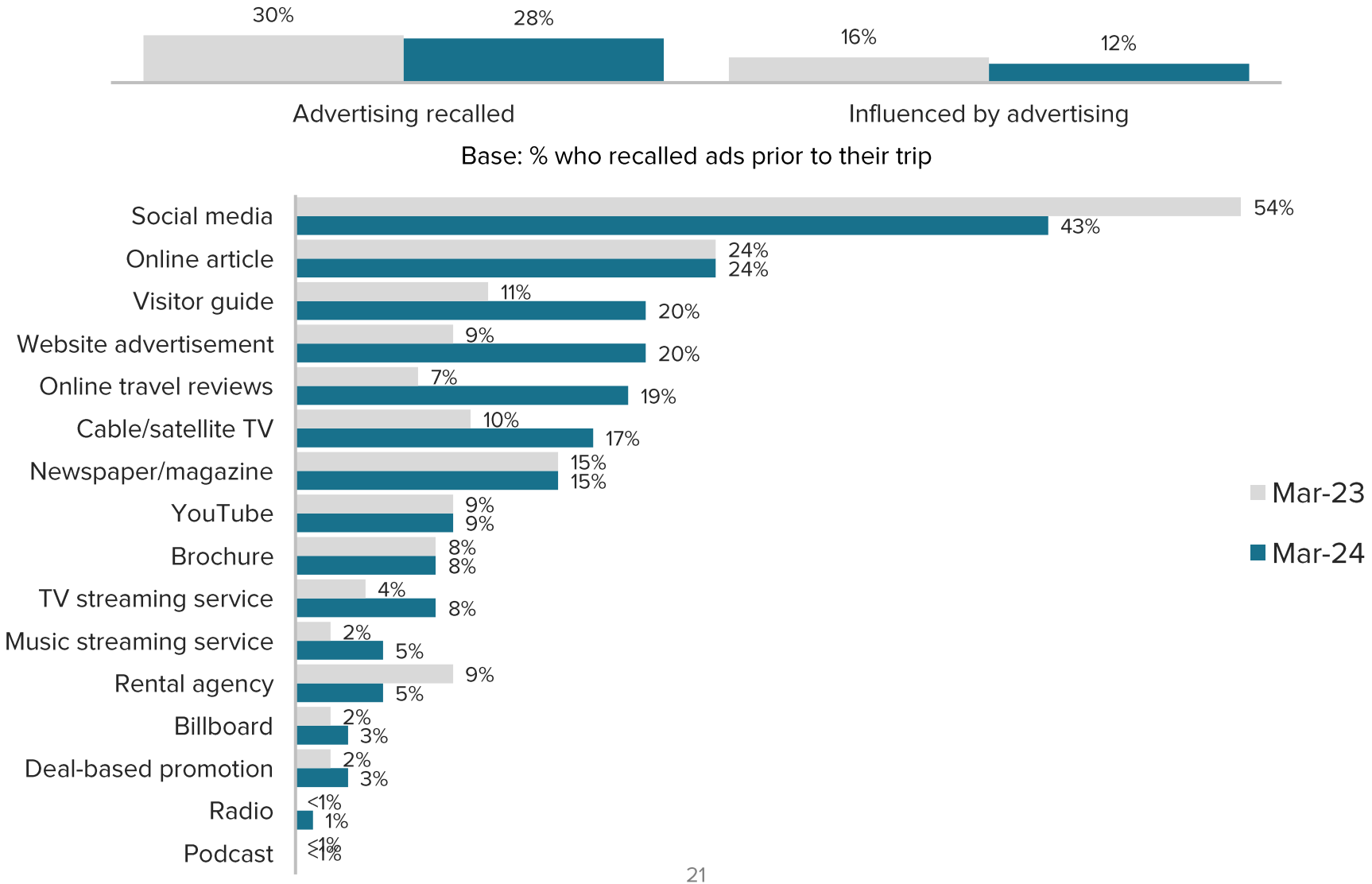
	FYTD 2023		FYTD 2024		Percent Change (Δ%)	
Region	# Visitors	Mkt Share	# Visitors	Mkt Share	# Visitors	Mkt Share
Florida	345,300	26.3%	274,500	19.2%	- 20.5%	- 26.8%
Southeast	118,600	9.0%	166,400	11.7%	+ 40.3%	+ 29.2%
Northeast	268,200	20.4%	321,500	22.5%	+ 19.9%	+ 10.4%
Midwest	380,700	29.0%	408,400	28.6%	+ 7.3%	- 1.2%
West	54,600	4.1%	70,500	4.9%	+ 29.1%	+ 18.9%
Canada	55,100	4.2%	68,600	4.8%	+ 24.5%	+ 14.6%
Europe	56,000	4.3%	84,000	5.9%	+ 50.0%	+ 38.1%
C/S America	19,800	1.5%	16,400	1.2%	- 17.2%	- 23.8%
Other	15,800	1.2%	17,200	1.2%	+ 8.9%	+ 0.2%
Total	1,314,100	100.0%	1,427,500	100.0%		



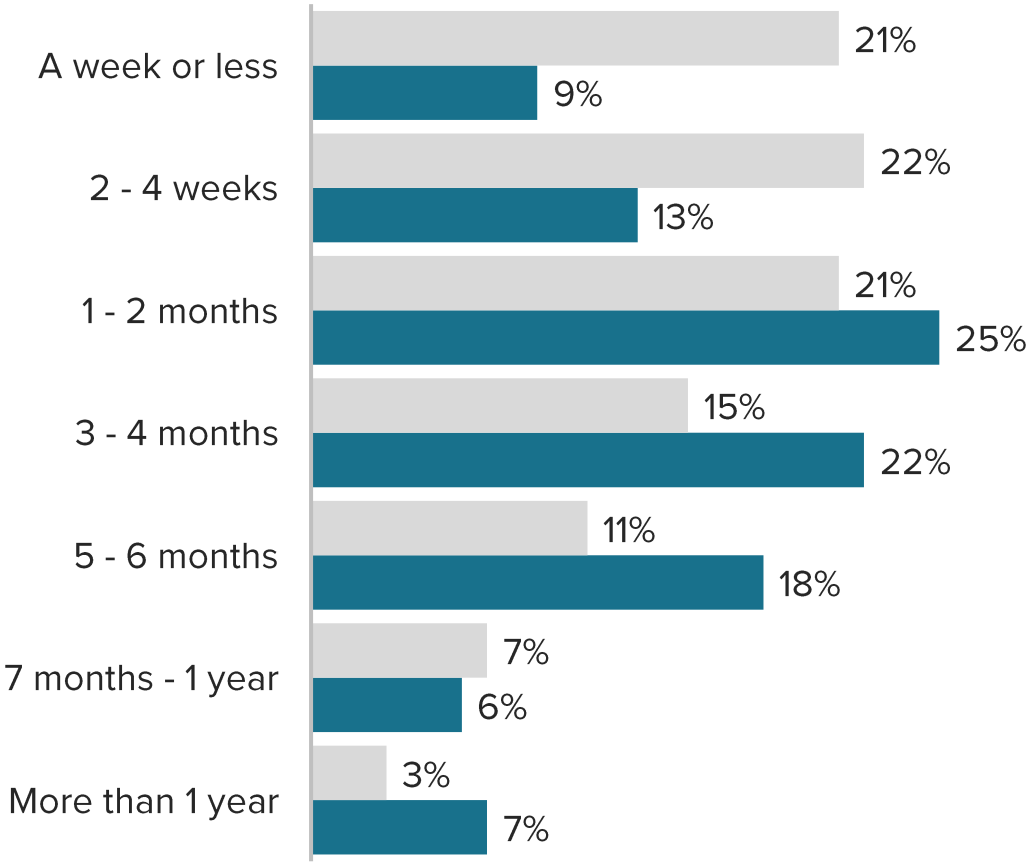
3a

DETAILED FINDINGS: PRE-VISIT

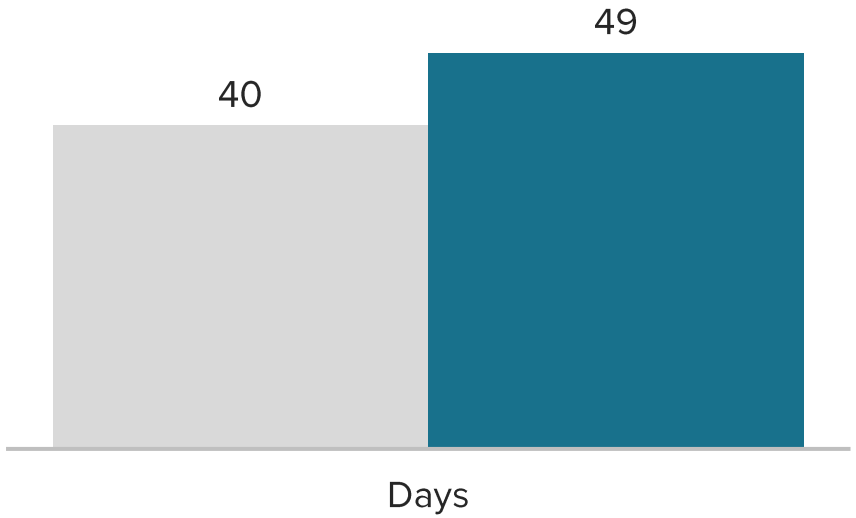
DETAILED FINDINGS | ADVERTISING RECALL[1]



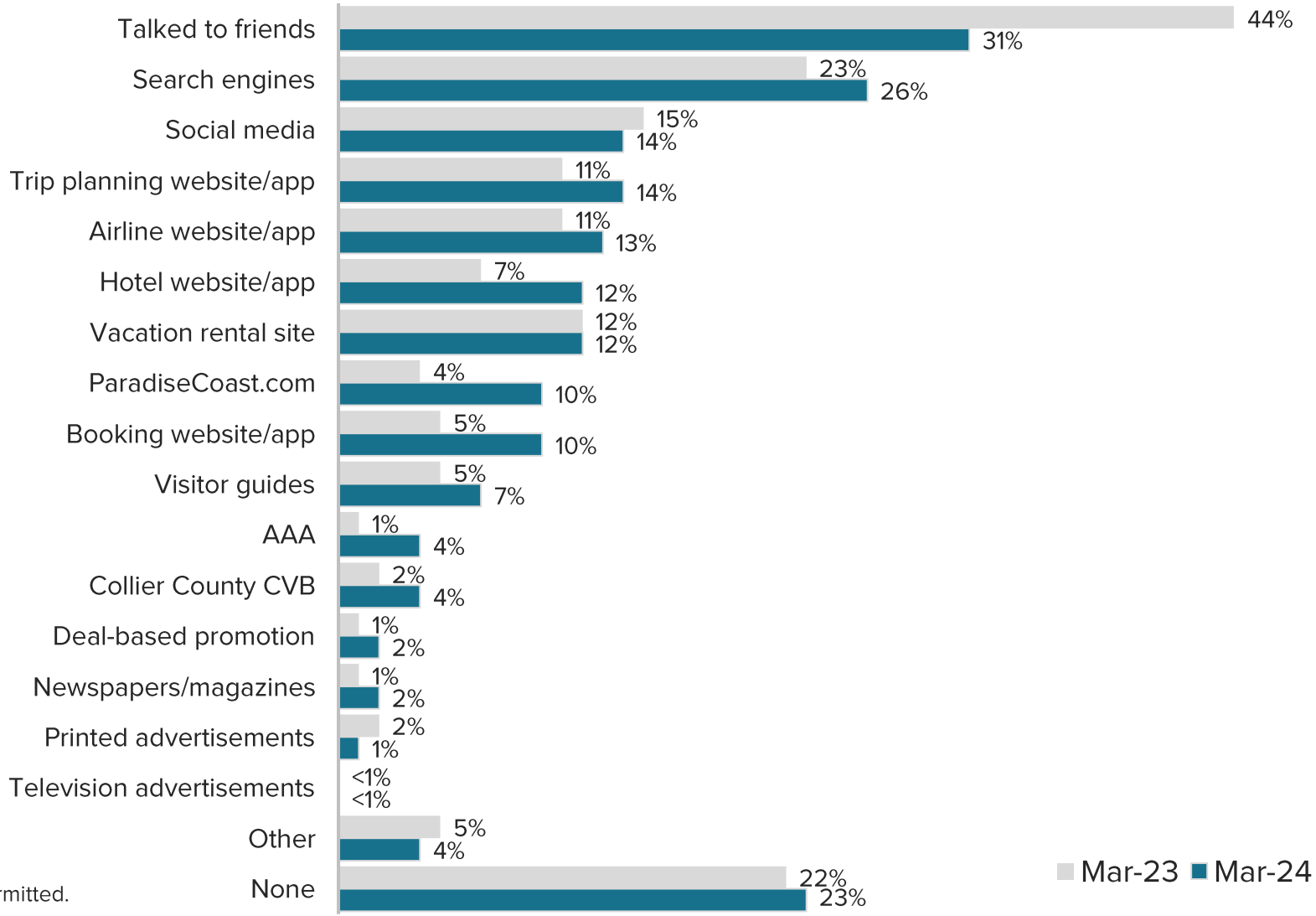
DETAILED FINDINGS | TRIP PLANNING CYCLE[1]



Median Trip Planning Time

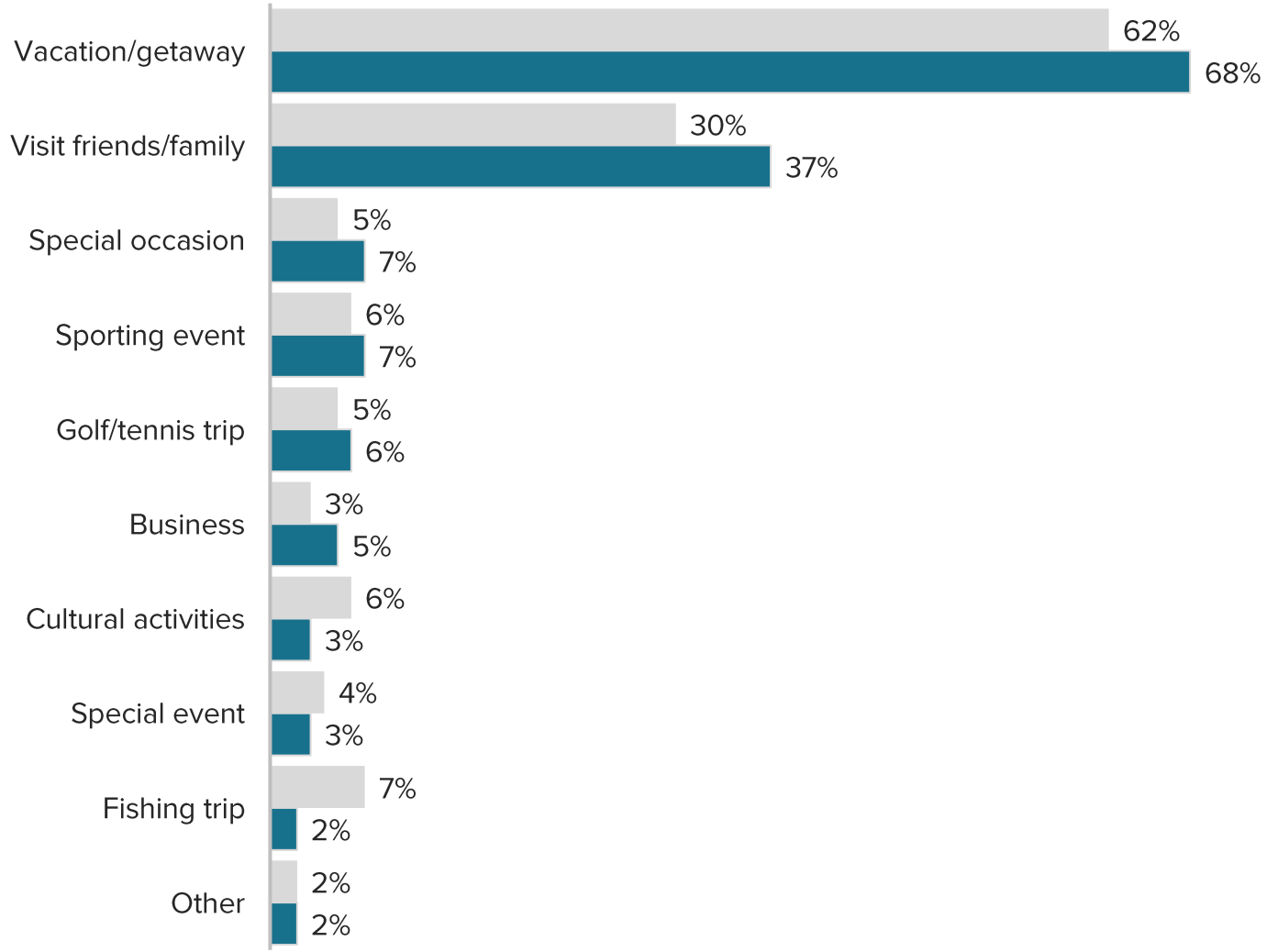


DETAILED FINDINGS | TRIP PLANNING SOURCES[1]



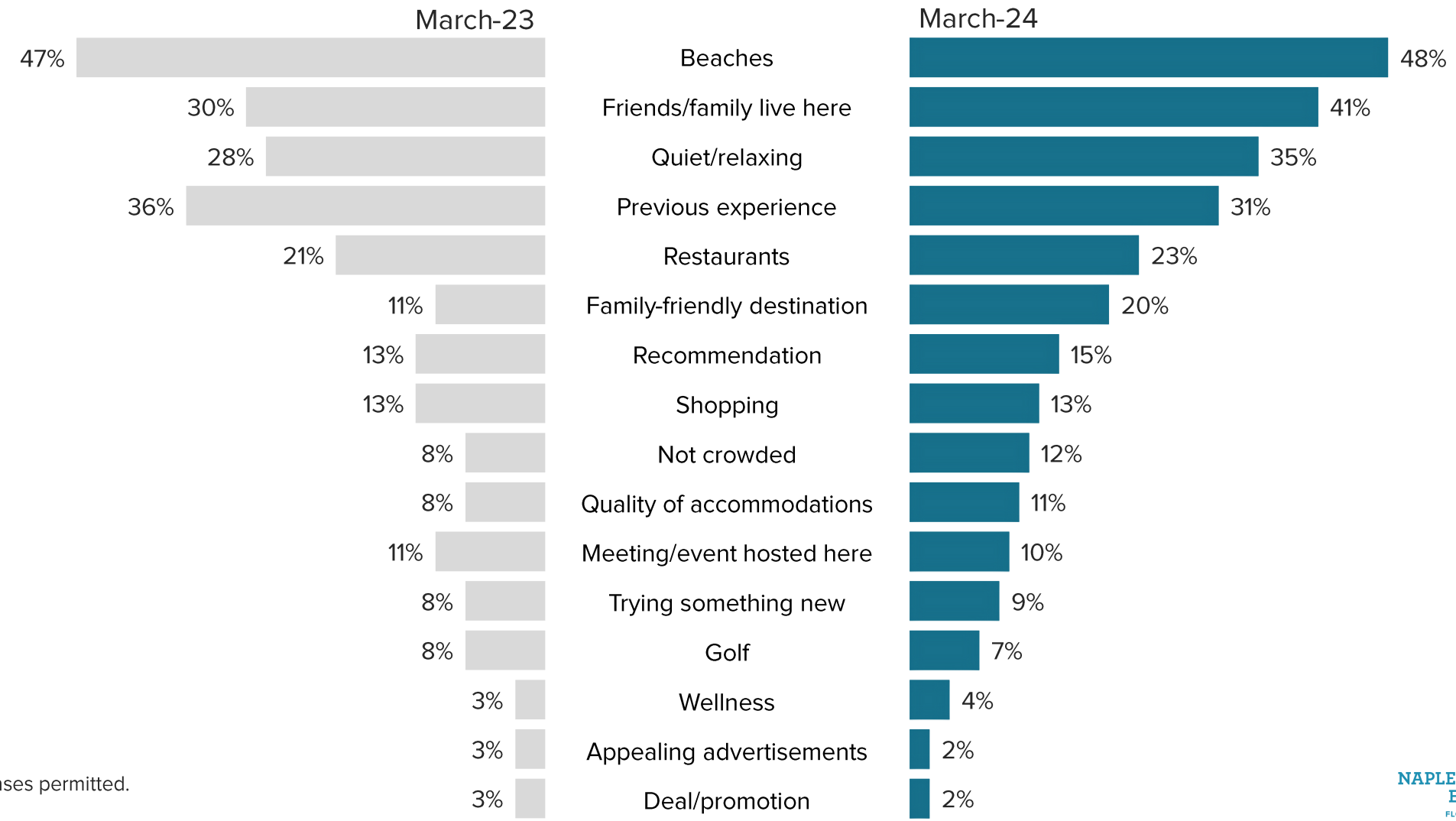
[1] Multiple responses permitted.

DETAILED FINDINGS | REASONS FOR VISITING[1]



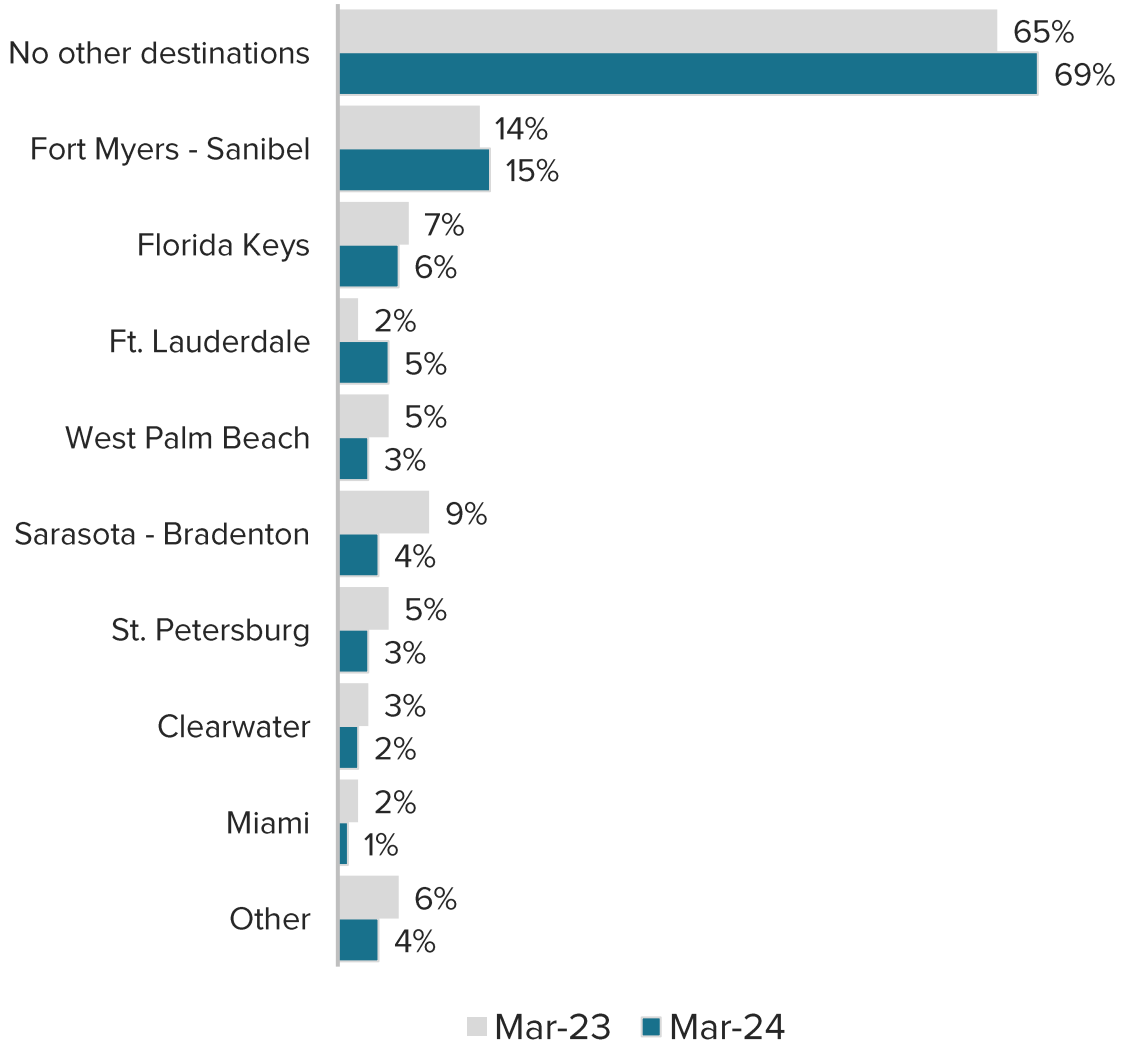
[1] Multiple responses permitted.

DETAILED FINDINGS | REASONS FOR CHOOSING[1]



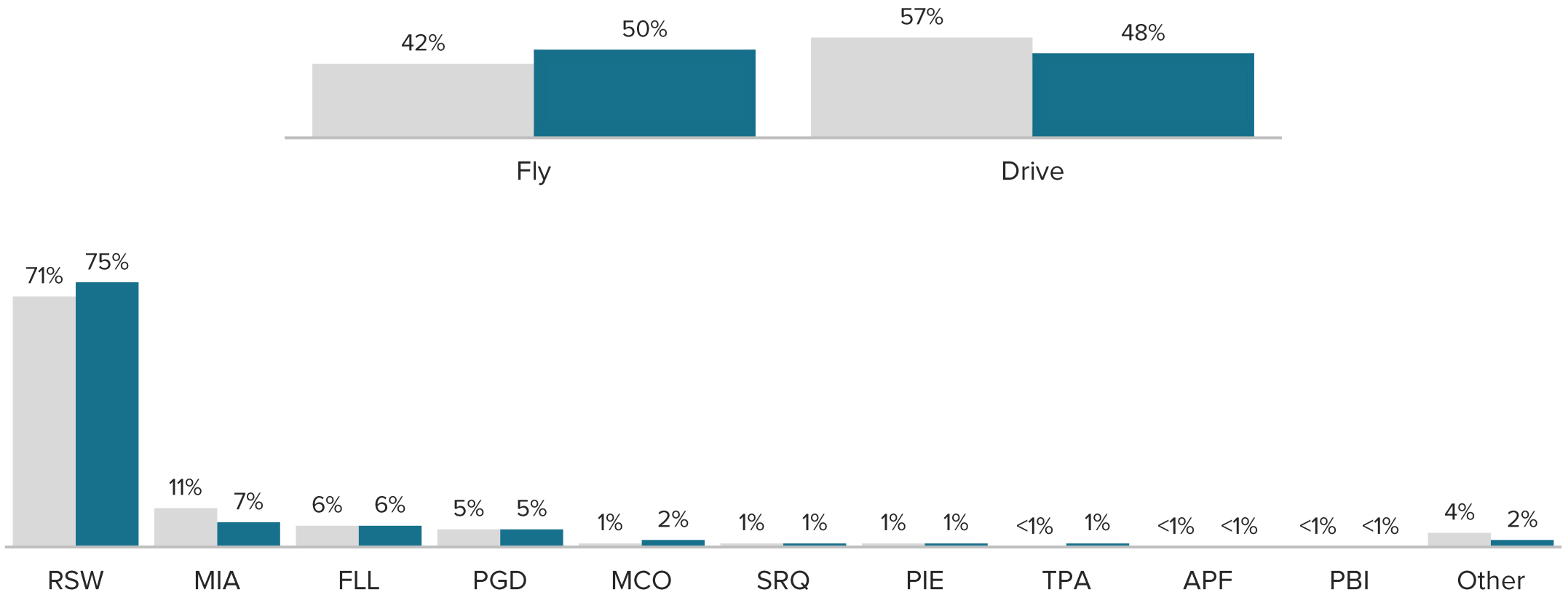
[1] Multiple responses permitted.

DETAILED FINDINGS | DESTINATIONS CONSIDERED[1]



[1] Multiple responses permitted.

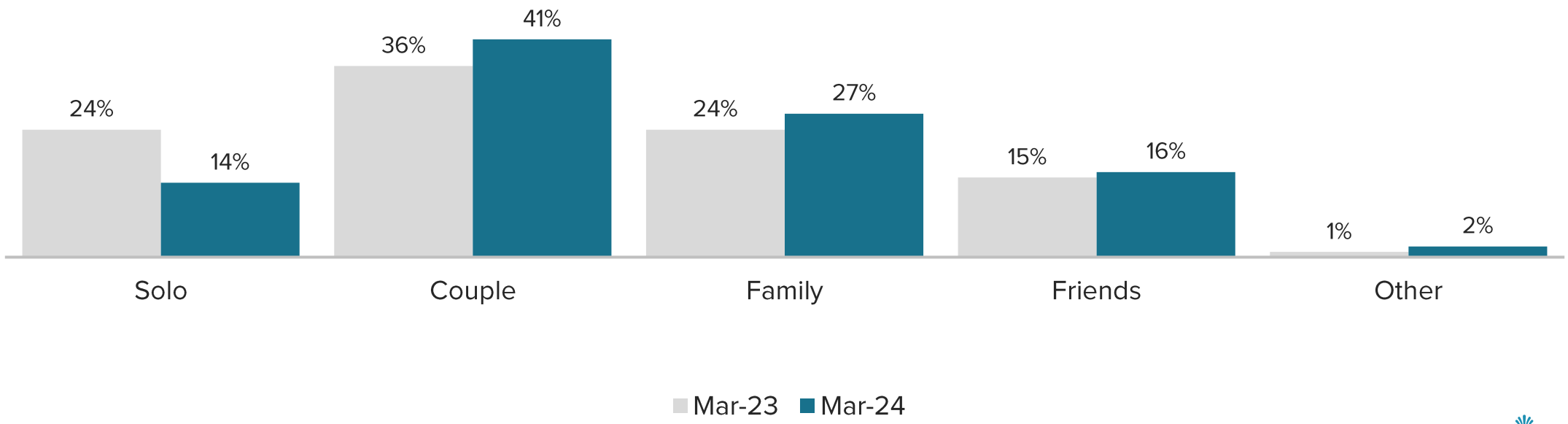
DETAILED FINDINGS | TRANSPORTATION



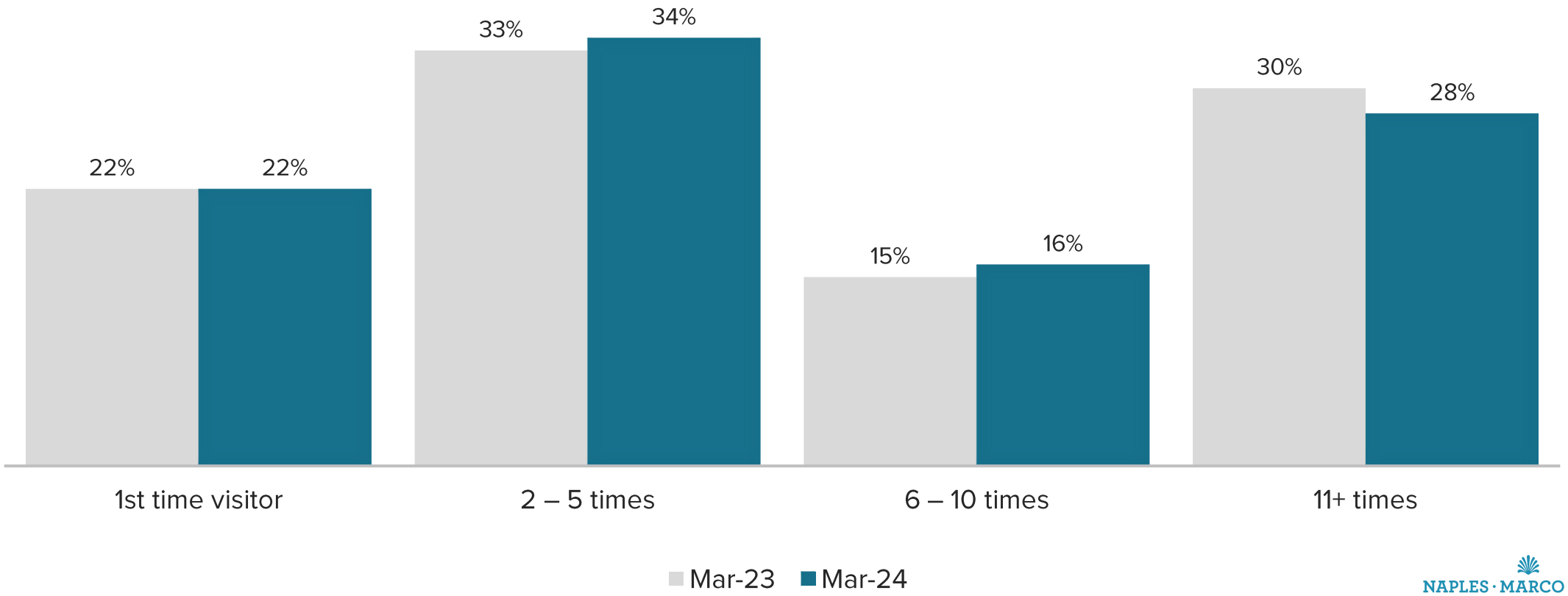
3b

DETAILED FINDINGS: TRAVEL PARTY PROFILE

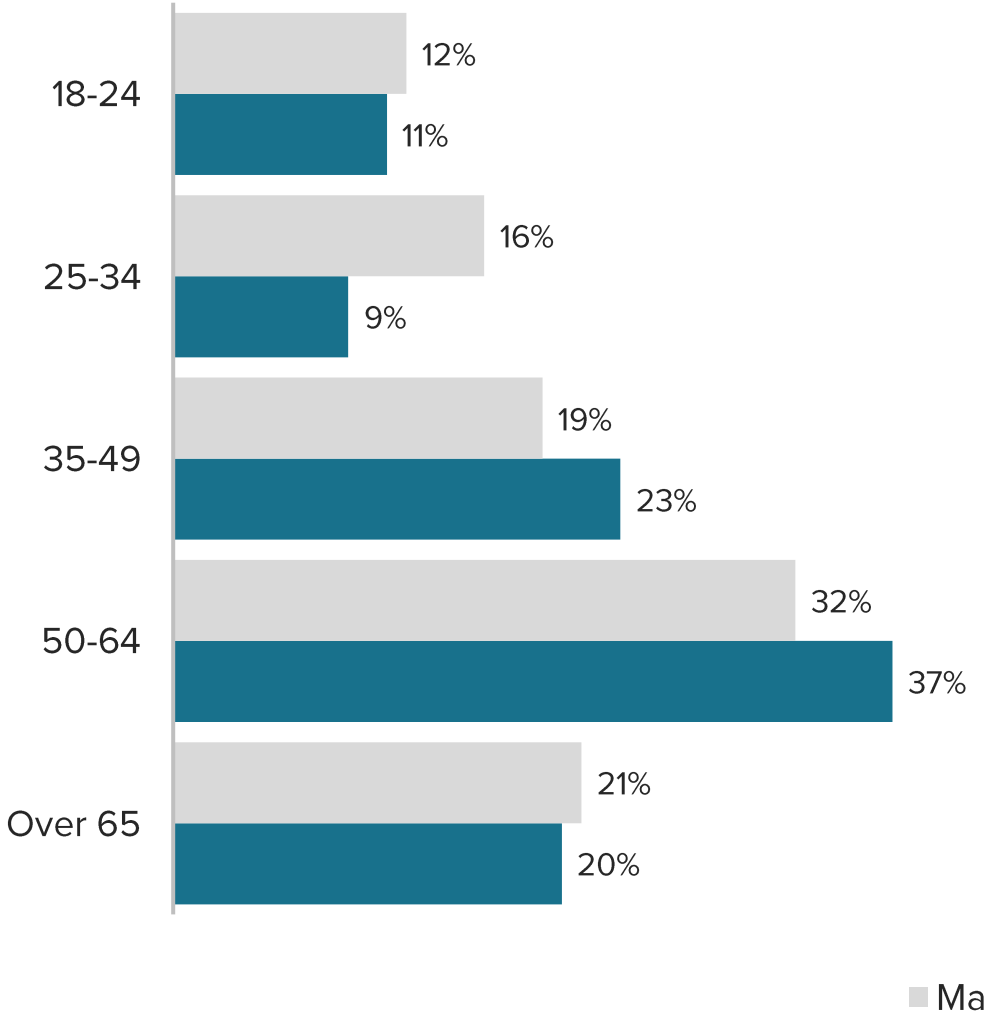
DETAILED FINDINGS | TRAVEL PARTY TYPE



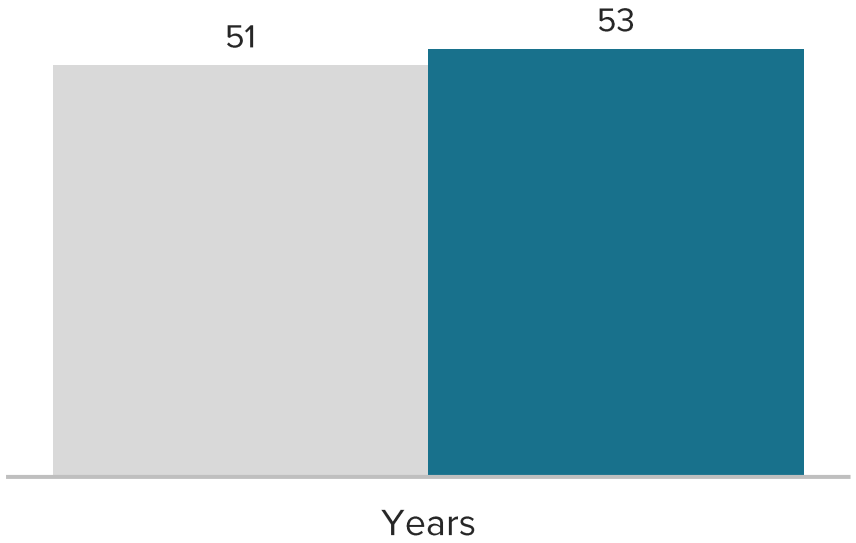
DETAILED FINDINGS | PREVIOUS VISITS



DETAILED FINDINGS | VISITOR AGES



Median Age



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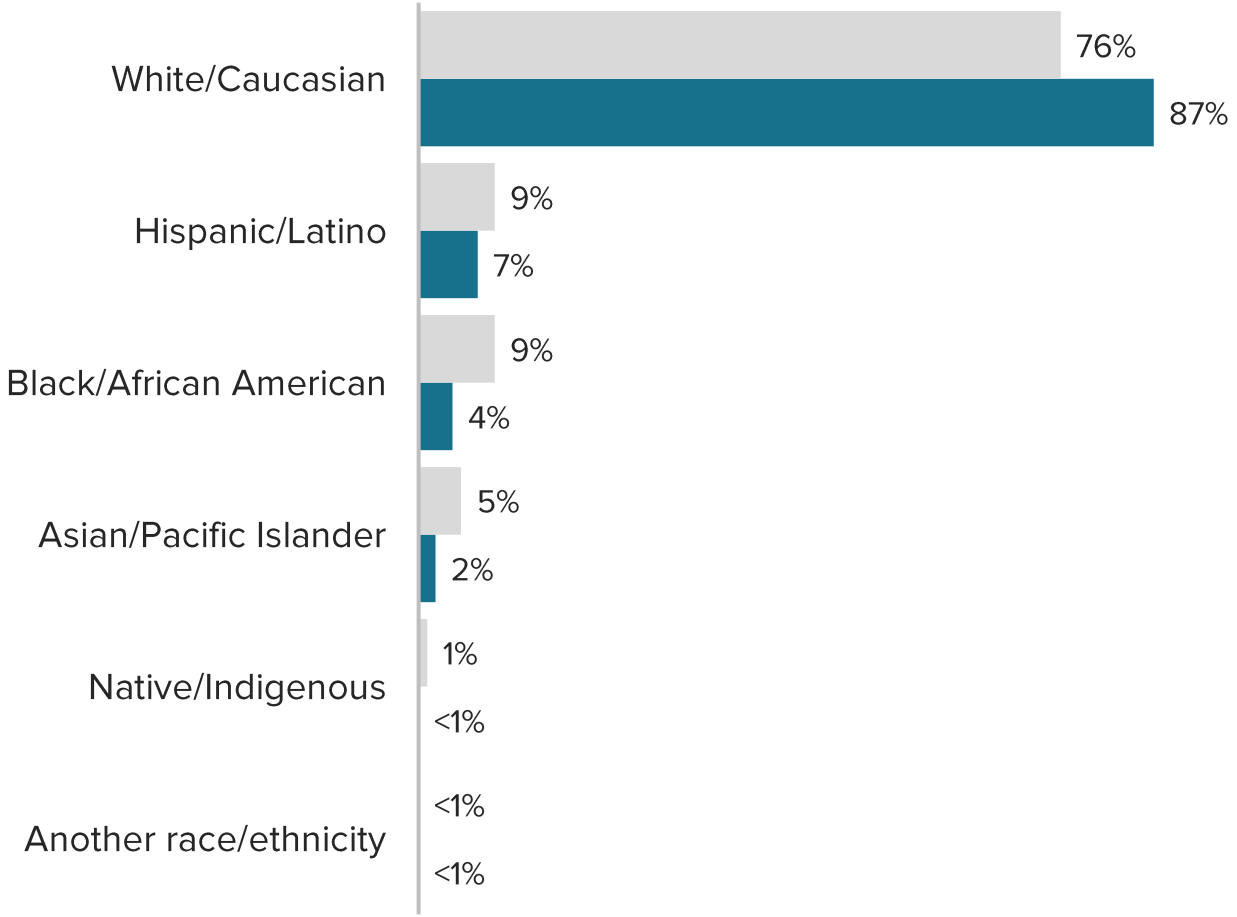
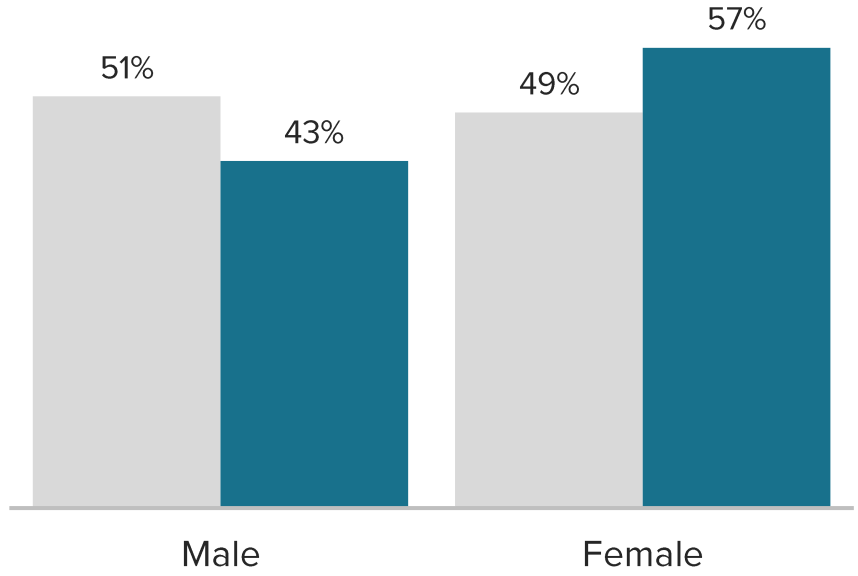
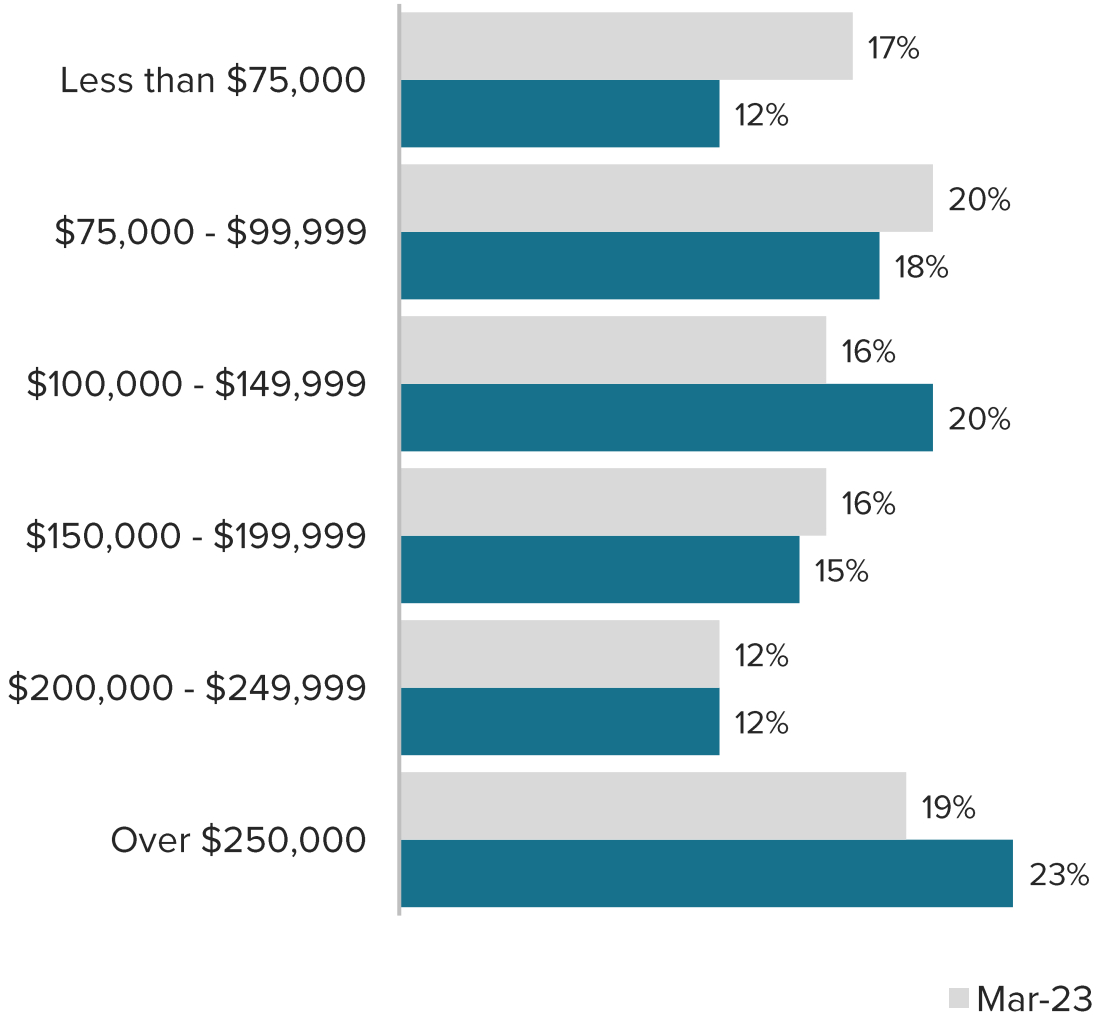
DETAILED FINDINGS | VISITOR RACE & GENDER[1]



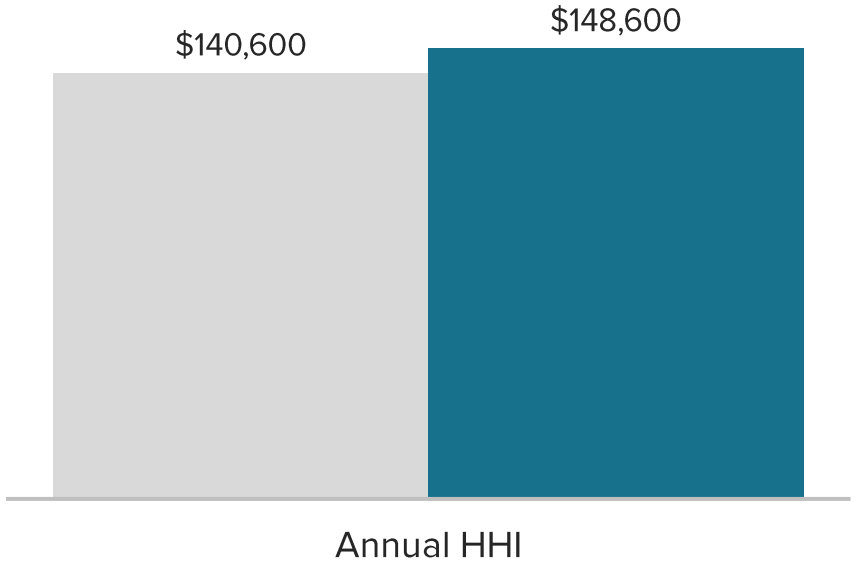


[1] Of person interviewed. Females are generally more likely to agree to participate in survey research.

DETAILED FINDINGS | VISITOR INCOME



Median Household Income



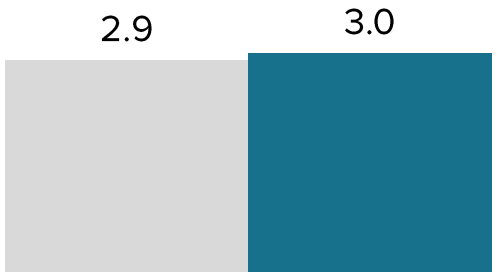
3c

DETAILED FINDINGS: TRIP EXPERIENCE

DETAILED FINDINGS | TRIP CHARACTERISTICS

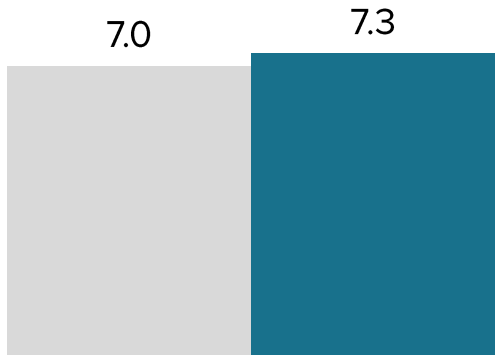
TRAVEL PARTY SIZE

3.0



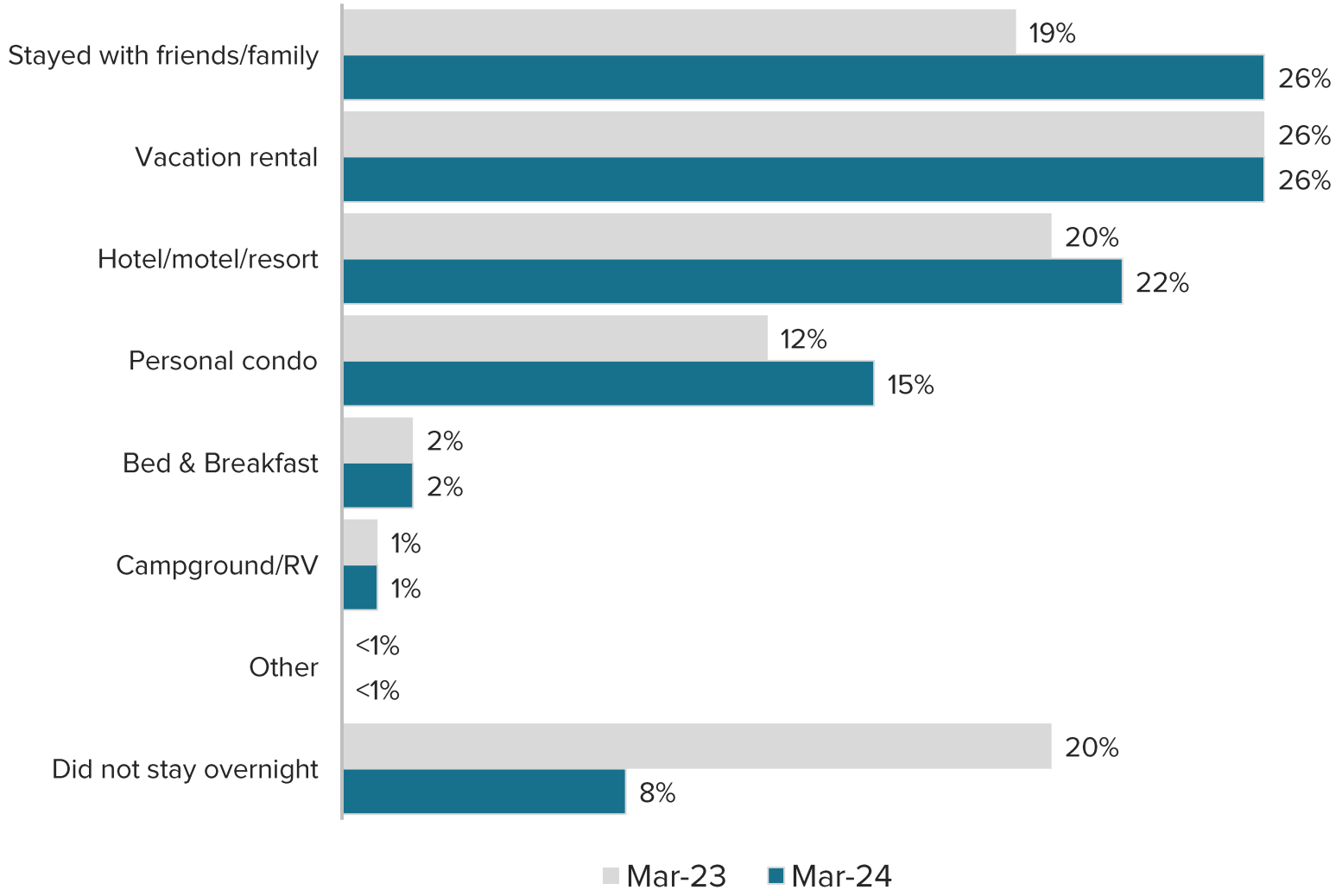
NIGHTS STAYED

7.3

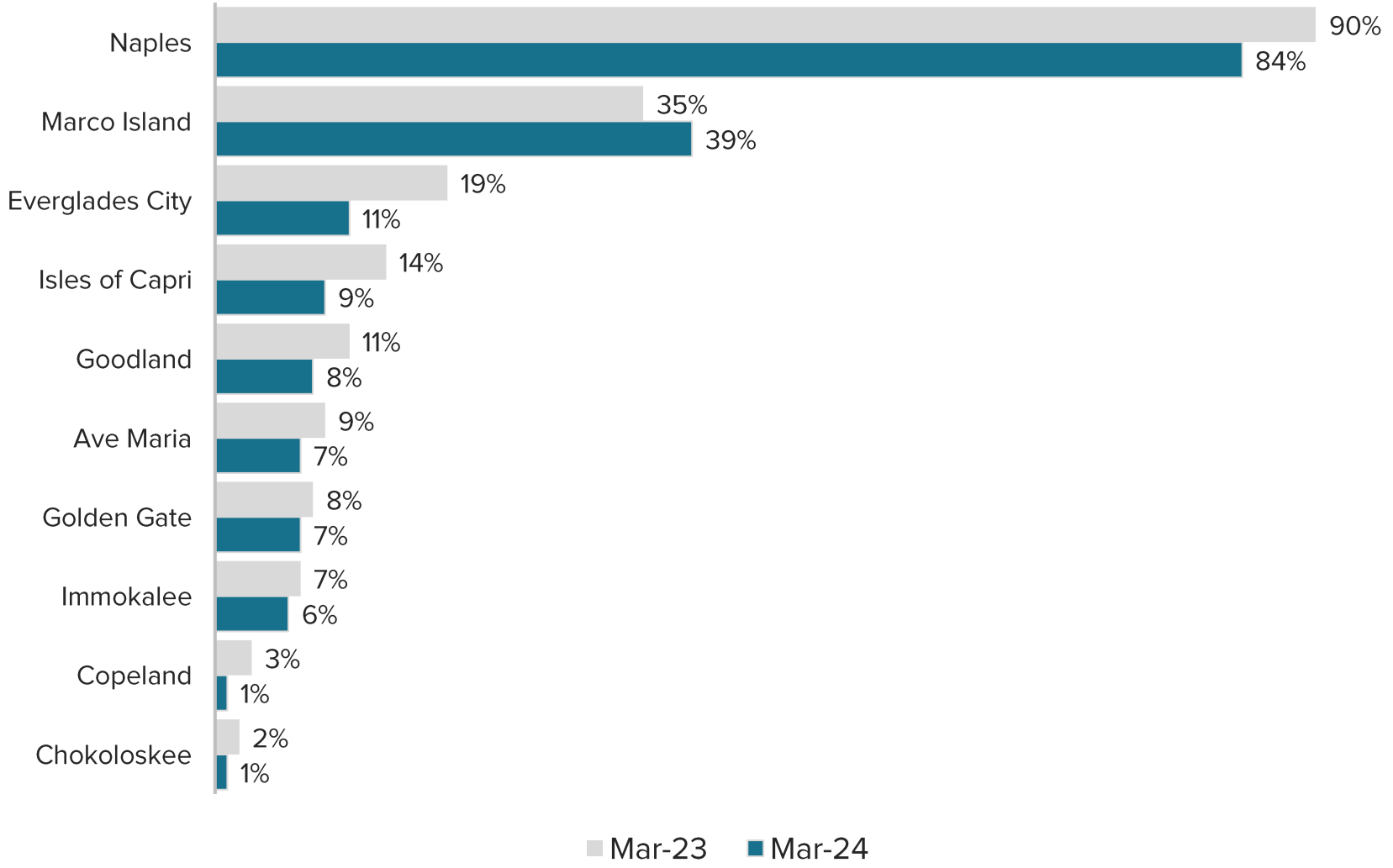


Mar-23 Mar-24

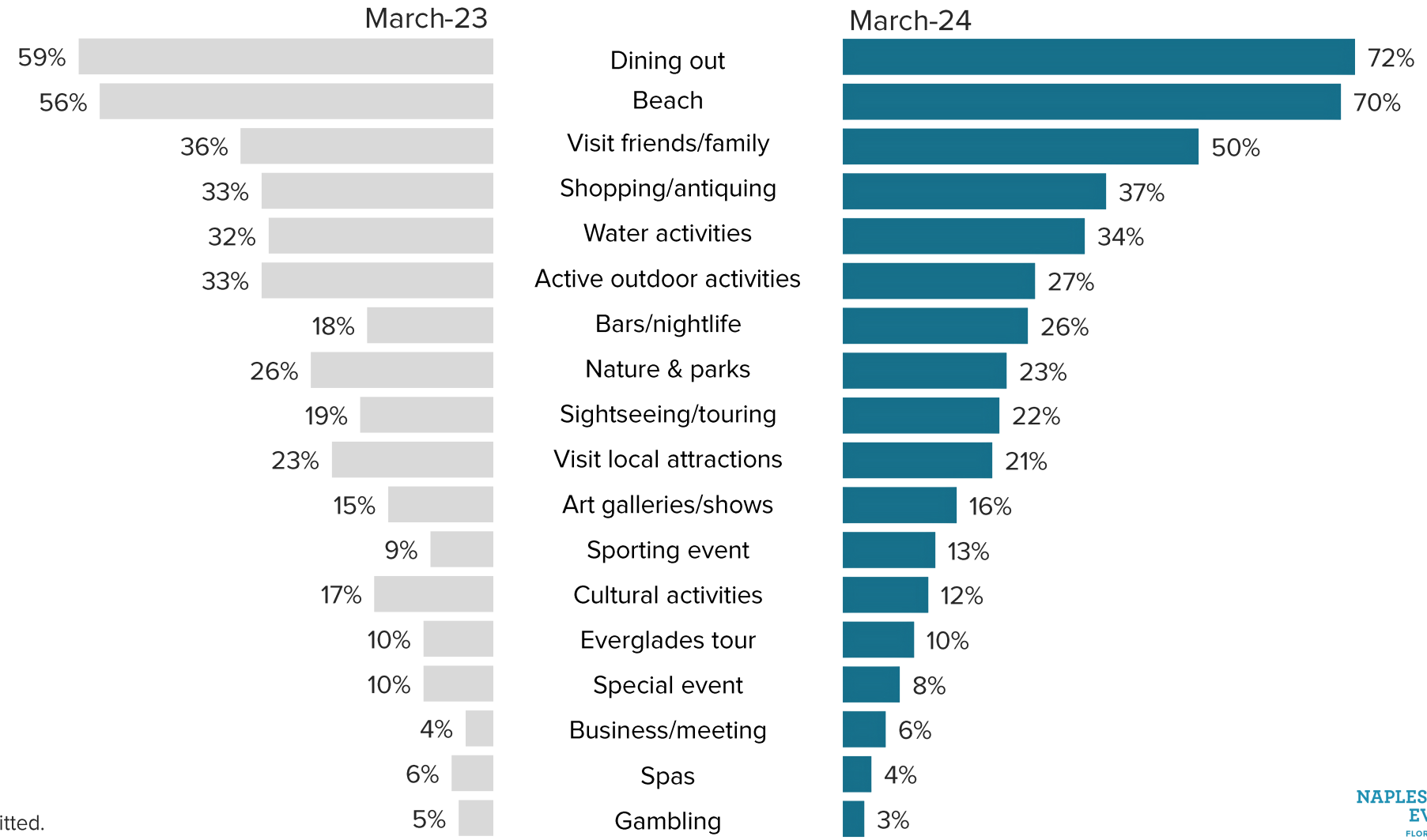
DETAILED FINDINGS | TYPE OF ACCOMODATIONS



DETAILED FINDINGS | AREAS VISITED

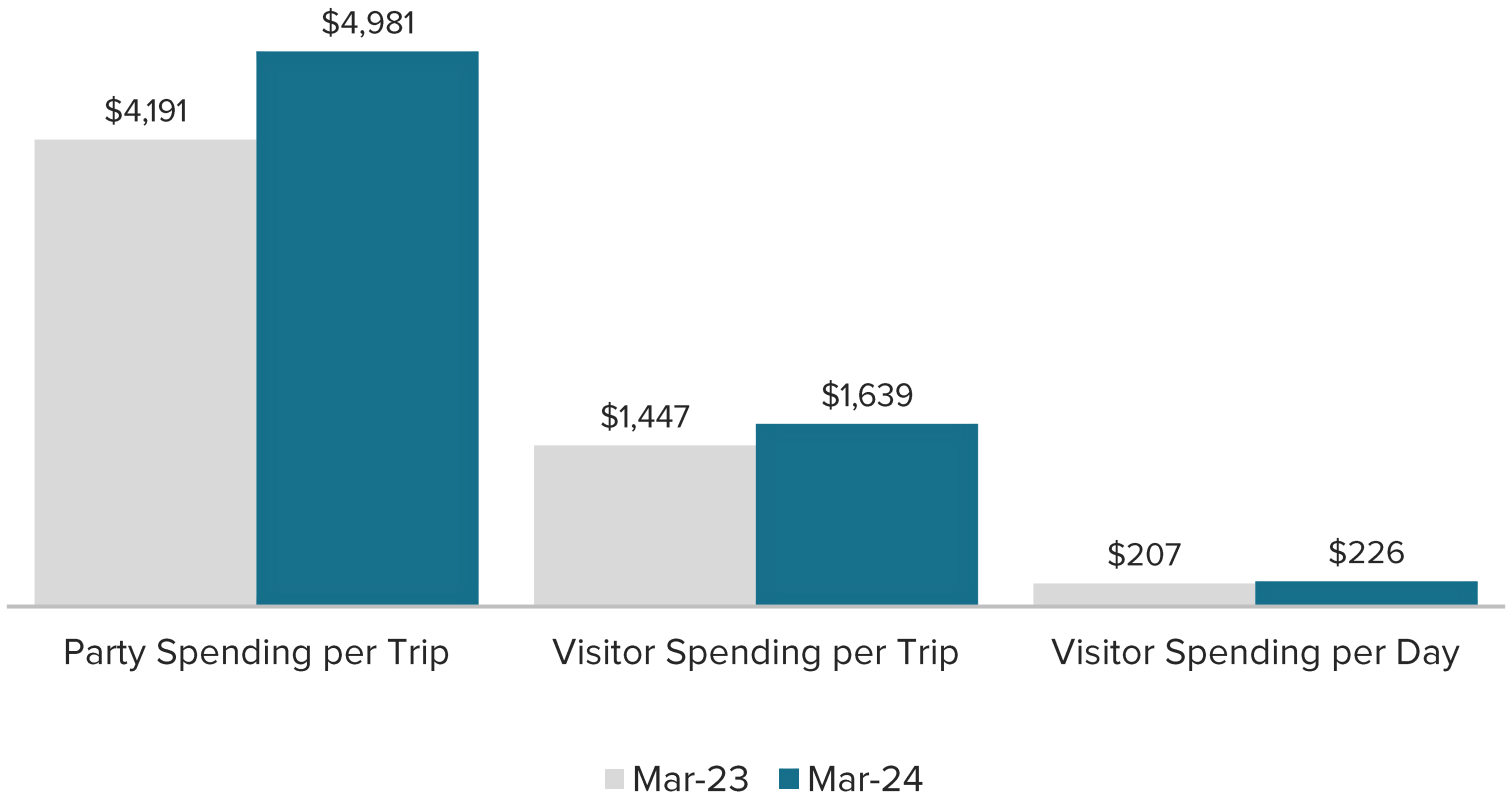


DETAILED FINDINGS | TRIP ACTIVITIES



[1] Multiple responses permitted.

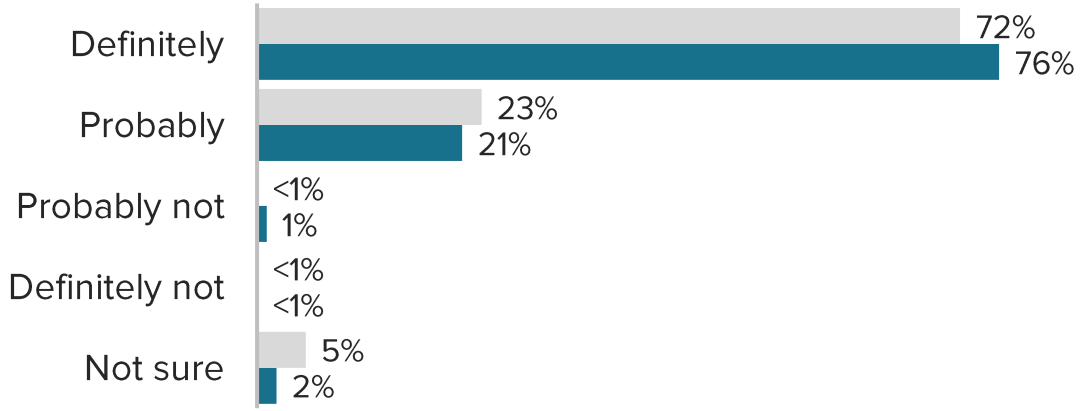
DETAILED FINDINGS | VISITOR SPENDING



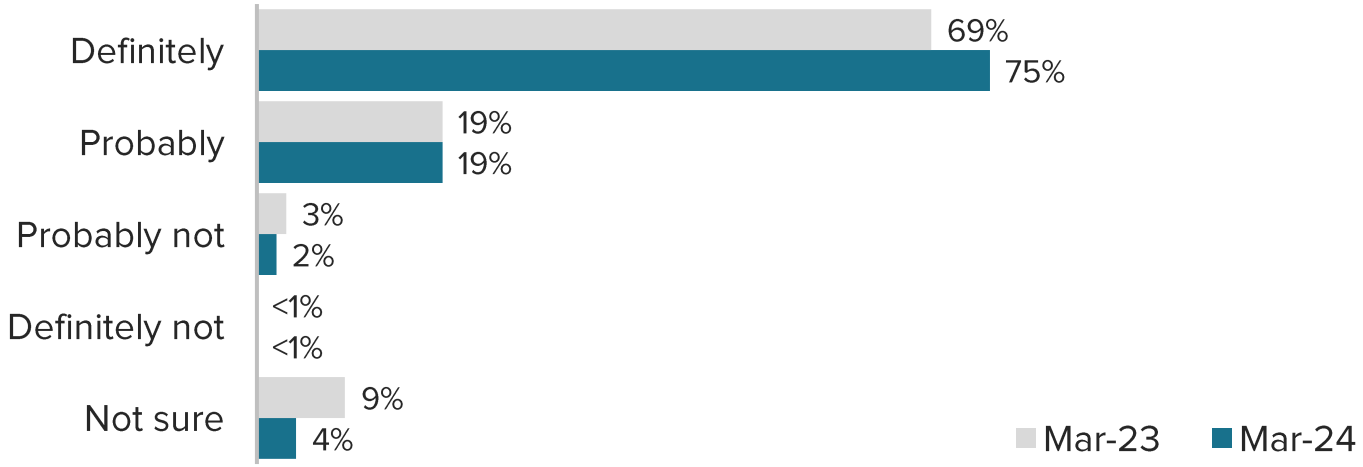
3d

DETAILED FINDINGS: POST-TRIP EVALUATION

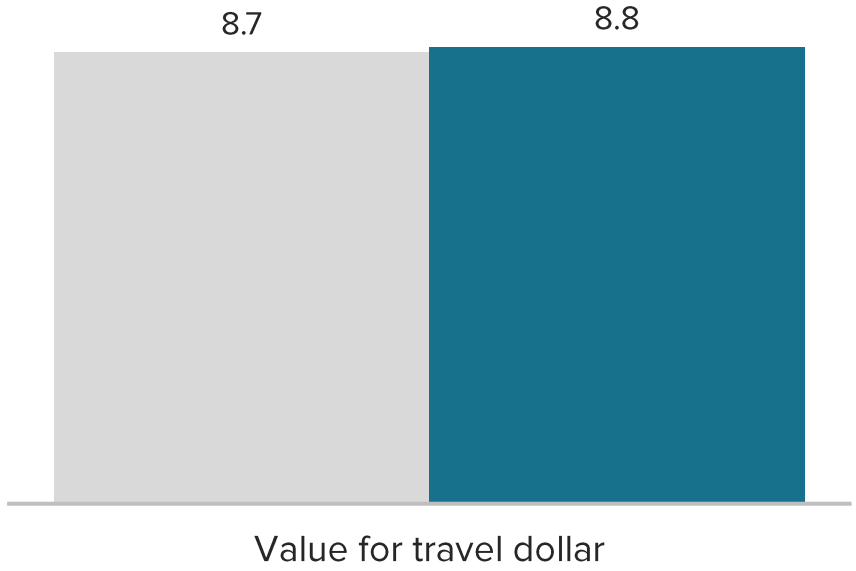
Will recommend the Naples area?



Will return to the Naples area?



VALUE FOR TRAVEL DOLLAR[1,2]



[1] 10-point scale where 10 is “excellent” and 1 is “poor”.
[2] All visitors who gave a rating of 6 or below cited high prices as their primary reason for giving lower ratings.

4

DESTINATION COMPARISONS

DESTINATION COMPARISONS | OCCUPANCY

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	Occupancy Rate (%)				Demand (Room Nights)				Δ% in Occupancy Rate from Mar 2023			
	Transient[2]	Group[3]	Contract[4]	Total	Transient[2]	Group[3]	Contract[4]	Total	Transient[2]	Group[3]	Contract[4]	Total
Naples	60.2%	16.7%	0.0%	76.9%	144,457	39,929	0	184,386	-1.4%	+3.3%	-100.0%	-0.7%
Miami	66.6%	12.6%	4.3%	83.5%	1,351,256	255,083	87,485	1,693,824	+7.2%	-17.2%	+0.2%	+2.3%
Florida Keys	78.9%	7.7%	0.2%	86.8%	255,271	24,872	701	280,844	+7.4%	-35.0%	-32.7%	+1.4%
Fort Myers	59.2%	12.0%	7.1%	78.3%	210,230	42,588	25,193	278,011	+1.4%	-28.5%	+39.6%	-2.5%
Sarasota	66.8%	14.4%	1.4%	82.6%	254,677	55,085	5,418	315,179	-3.2%	+9.1%	+40.2%	-0.7%
Clearwater	72.8%	11.6%	0.0%	84.5%	204,937	32,740	0	237,677	+5.3%	-29.5%	0.0%	-1.4%
St. Petersburg	67.5%	15.0%	0.7%	83.3%	239,506	53,263	2,504	295,272	+6.8%	-22.0%	+16.8%	+0.2%
Palm Beach	62.8%	15.5%	2.6%	80.9%	372,622	91,759	15,702	480,082	+0.2%	-11.9%	+13.6%	-2.0%
Ft. Lauderdale	69.2%	10.5%	2.7%	82.4%	833,076	126,692	32,439	992,207	+3.5%	-15.6%	-15.3%	-0.1%

[1]Metrics provided by STR.
[2] Transient bookings include rooms sold to individuals or groups occupying less than 10 rooms per night.
[3] Group bookings include bookings of 10 rooms or more per night, sold pursuant to a signed agreement.
[4] Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.

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DESTINATION COMPARISONS | ROOM RATES

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	Average Daily Rate ($)				Δ% in ADR from Mar 2023			
	Transient[2]	Group[3]	Contract[4]	Total	Transient[2]	Group[3]	Contract[4]	Total
Naples	$542.27	$435.27	$0.00	$519.10	+29.8%	+18.7%	-100.0%	+27.7%
Miami	$291.51	$294.74	$139.29	$284.14	-0.5%	-3.2%	+14.6%	-0.6%
Florida Keys	$500.30	$418.11	$381.12	$492.72	+1.7%	-2.1%	+1.2%	+2.1%
Fort Myers	$251.76	$240.78	$202.02	$245.57	-0.8%	-2.5%	+35.4%	-0.1%
Sarasota	$299.25	$204.39	$194.89	$280.88	+3.3%	-4.9%	+33.0%	+1.8%
Clearwater	$306.65	$236.15	$0.00	$296.94	+9.2%	-0.5%	0.0%	+9.0%
St. Petersburg	$280.37	$220.45	$143.76	$268.40	-0.1%	-1.5%	+11.3%	+0.8%
Palm Beach	$386.32	$347.44	$166.42	$371.70	+1.1%	+5.1%	+11.4%	+1.9%
Ft. Lauderdale	$234.90	$268.07	$160.26	$236.69	-3.9%	+4.3%	+8.8%	-2.4%

[1] Metrics provided by STR.
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DESTINATION COMPARISONS | ROOM REVENUE

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	Revenue per Available Room ($)				Revenue (Millions of Dollars)				Δ% in RevPAR from Mar 2023			
	Transient[2]	Group[3]	Contract[4]	Total	Transient[2]	Group[3]	Contract[4]	Total	Transient[2]	Group[3]	Contract[4]	Total
Naples	$326.69	$72.48	$0.00	$399.17	$78.335	$17.380	$0.000	$95.715	+28.0%	+22.6%	-100.0%	+26.8%
Miami	$194.18	$37.06	$6.01	$237.25	$393.909	$75.184	$12.186	$481.278	+6.7%	-19.9%	+14.8%	+1.6%
Florida Keys	$394.72	$32.14	$0.83	$427.69	$127.711	$10.399	$0.267	$138.377	+9.3%	-36.4%	-31.9%	+3.6%
Fort Myers	$149.10	$28.89	$14.34	$192.33	$52.928	$10.254	$5.090	$68.272	+0.6%	-30.3%	+89.0%	-2.5%
Sarasota	$199.83	$29.52	$2.77	$232.12	$76.213	$11.259	$1.056	$88.527	0.0%	+3.8%	+86.5%	+1.0%
Clearwater	$223.36	$27.48	$0.00	$250.84	$62.844	$7.732	$0.000	$70.576	+14.9%	-29.8%	0.0%	+7.4%
St. Petersburg	$189.33	$33.11	$1.01	$223.45	$67.151	$11.742	$0.360	$79.252	+6.7%	-23.2%	+30.1%	+1.0%
Palm Beach	$242.66	$53.74	$4.41	$300.81	$143.952	$31.881	$2.613	$178.445	+1.3%	-7.4%	+26.6%	-0.1%
Ft. Lauderdale	$162.59	$28.22	$4.32	$195.13	$195.687	$33.963	$5.199	$234.849	-0.5%	-12.0%	-7.8%	-2.5%

[1]Metrics provided by STR.
[2] Transient bookings include rooms sold to individuals or groups occupying less than 10 rooms per night.
[3] Group bookings include bookings of 10 rooms or more per night, sold pursuant to a signed agreement.
[4] Contract bookings include a consistent block of rooms committed at stipulated contract rates for an extended period longer than 30 days, with payment guaranteed regardless of use, such as for airline crews and long-term guests.

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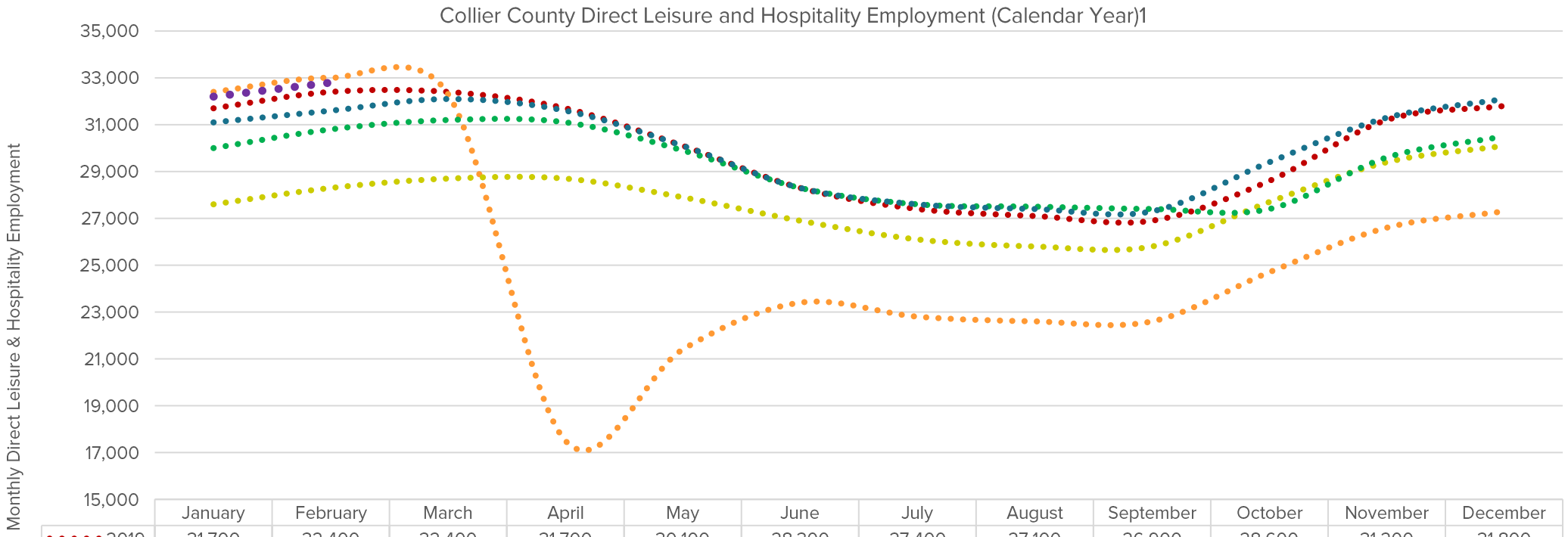
5

INDUSTRY DATA

INDUSTRY DATA | CURRENT EMPLOYMENT



	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	28,700	27,900	26,900	26,100	25,800	25,800	27,700	29,400	30,100
2022	30,000	30,800	31,200	31,100	29,900	28,300	27,600	27,500	27,400	27,400	29,600	30,500
2023	31,100	31,600	32,100	31,600	30,100	28,300	27,600	27,400	27,300	29,400	31,300	32,100
2024	32,200	32,800 (P)										

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

INDUSTRY DATA | RSW PASSENGER TRAFFIC

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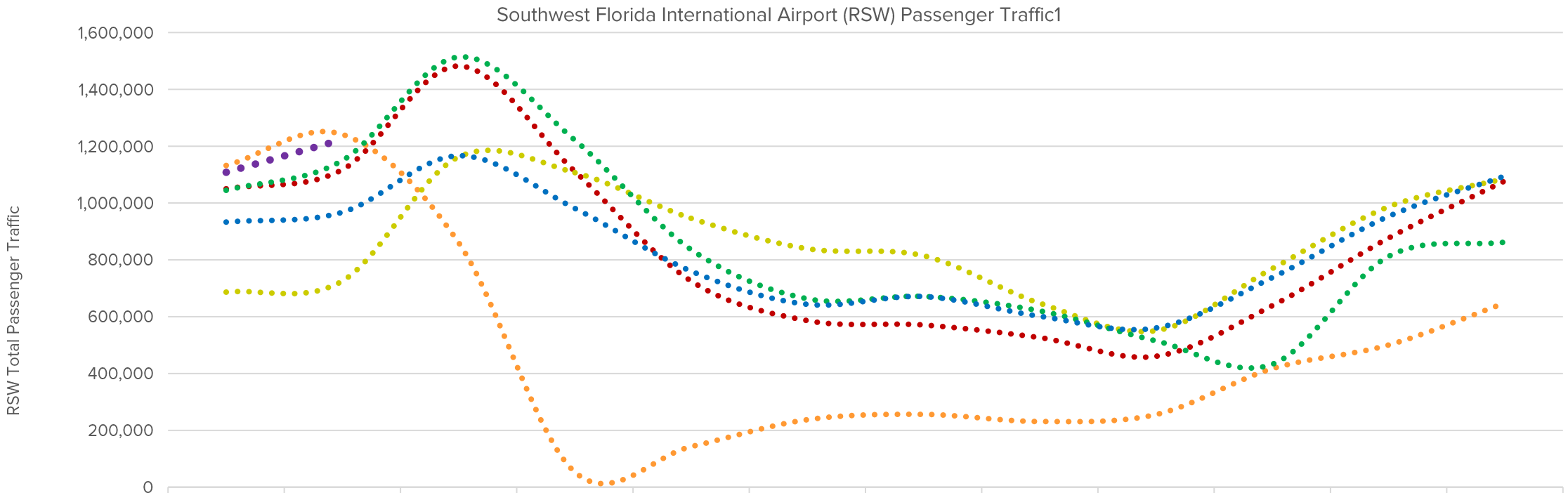

	January	February	March	April	May	June	July	August	September	October	November	December
2019	1,050,093	1,117,409	1,482,239	1,111,558	725,754	586,319	570,977	526,519	460,869	638,922	876,703	1,077,818
2020	1,132,103	1,241,590	861,221	53,379	143,004	237,706	256,418	231,283	255,926	417,305	500,468	648,011
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	515,007	432,667	812,305	862,368
2023	932,896	967,416	1,166,442	981,216	760,330	643,486	670,818	601,542	560,358	737,527	953,025	1,094,783
2024	1,108,190	1,223,761										

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

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INDUSTRY DATA | LICENSED RENTAL UNITS

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March 2024 Licensed Transient Rental Units				
	Hotel	**Motel**	**Vacation Rental**	**Total**
Naples	4,600	1,270	3,107	8,977
Marco Island	1,275	121	2,070	3,466
Immokalee	0	70	104	174
Golden Gate	0	150	0	150
Everglades City	38	36	21	95
Chokoloskee	0	13	2	15
Goodland	0	5	8	13
Ave Maria	0	0	5	5
Ochopee	0	0	1	1
Total	**5,913**	**1,665**	**5,318**	**12,896**[2]

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

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Questions?

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THANK YOU