



NAPLES • MARCO ISLAND EVERGLADESSM

FLORIDA'S PARADISE COAST

July 2024 Monthly Visitor Dashboard

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1

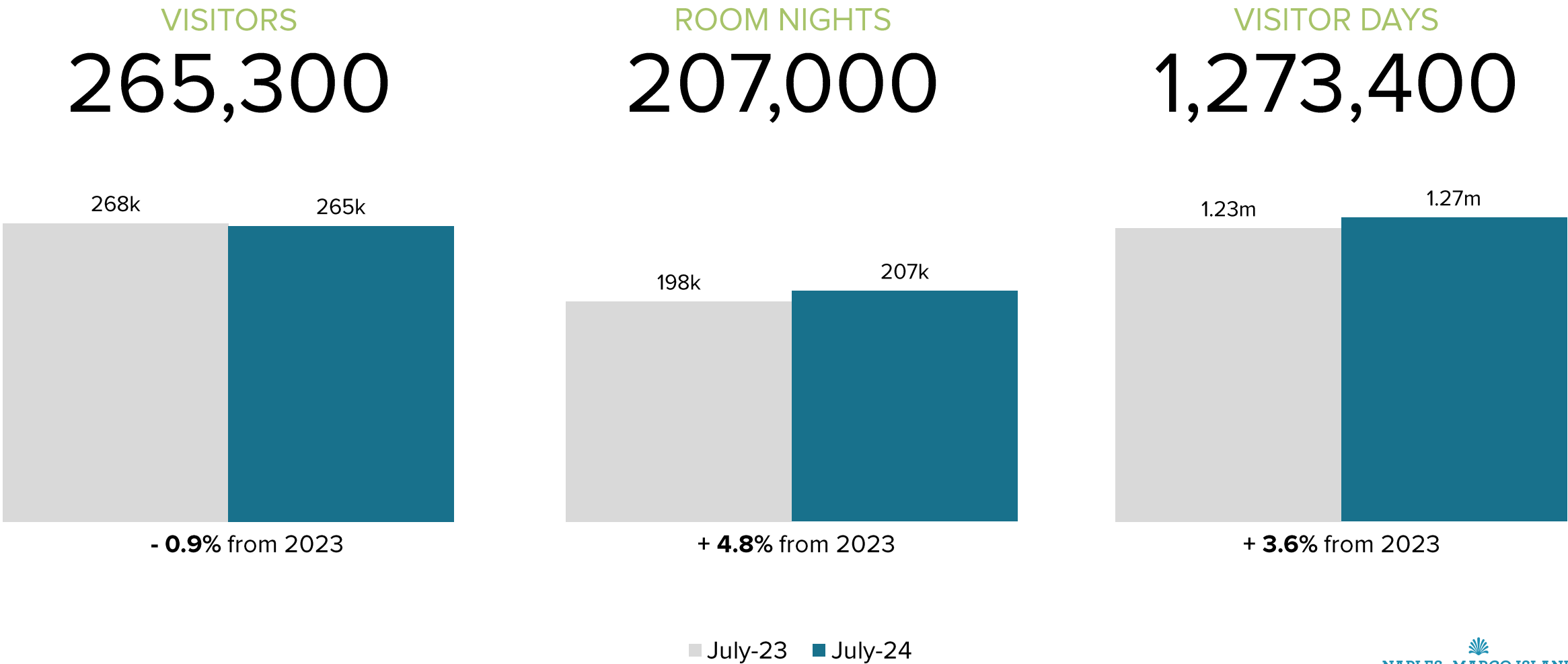
MONTHLY
SNAPSHOT

- In July 2024, overall occupancy rate decreased 3.2% compared to July 2023, largely due to the increase in the number of room nights available being larger than the increase in room night demand.
- Average Daily Rate (ADR) increased 3.6% year-over-year, which resulted in a revenue per available room (RevPAR) of \$138.52, up only very slightly from \$138.16 last year.
- Direct spending by visitors and total economic impact of tourism in July increased by 4.7% and 4.6%, respectively. The total economic impact of tourism is currently up 11.5% so far fiscal-year-to-date, with two months remaining in the 2024 fiscal year.
- In terms of visitor attributes, July 2024 saw year-over-year increases in the number of visitors who came for special occasions (weddings, reunions, etc.), visitors who dined out during their visits, visitors travelling as a couple, and in the median household income of visitors.
- In July 2024, compared to July 2023, there were fewer travelers who traveled as a family, fewer first-time visitors, and fewer visitors whose main reason for visiting the area was for a vacation or getaway.

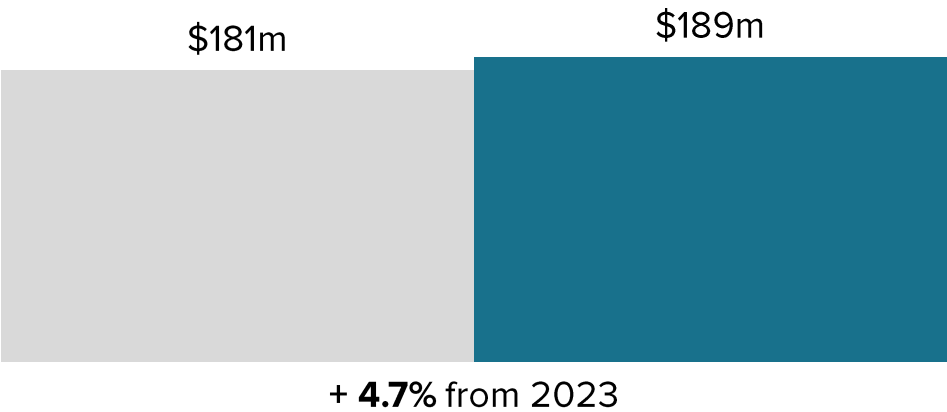


2a

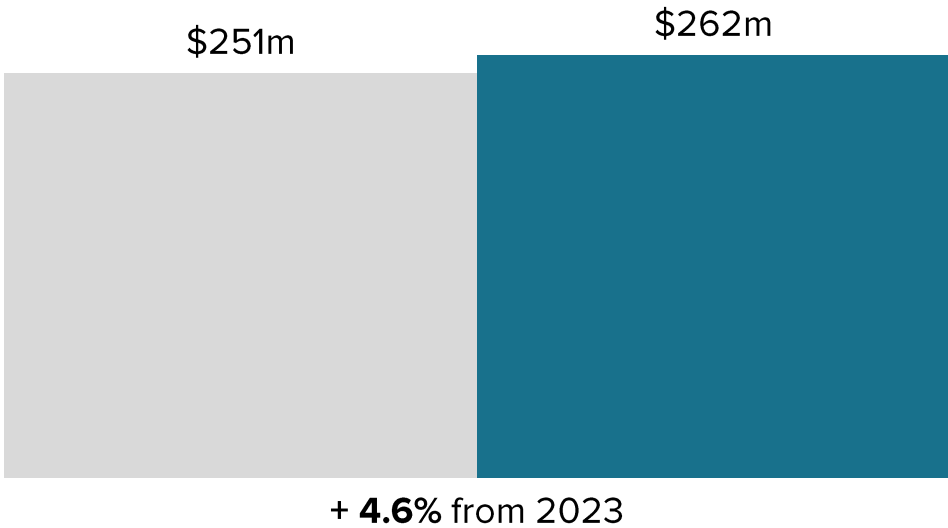
EXECUTIVE
MONTHLY
SUMMARY



DIRECT SPENDING
\$189,193,000



ECONOMIC IMPACT
\$262,221,500

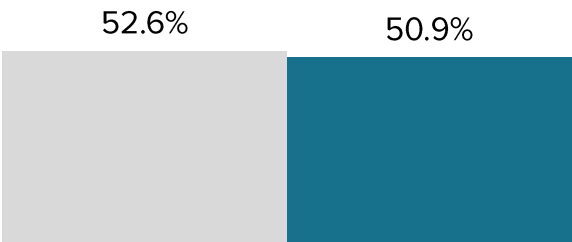


¹The IMPLAN multiplier for Collier County was 1.388 for 2023 and is 1.386 in 2024.

■ July-23 ■ July-24

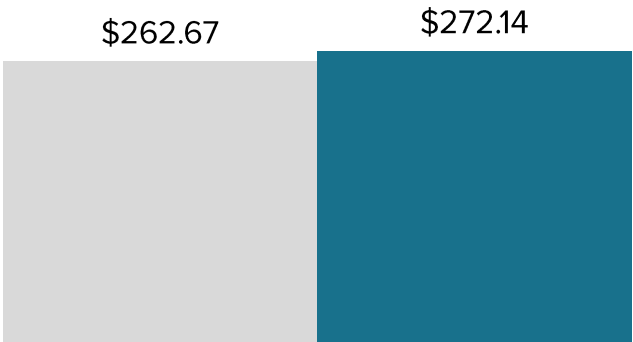
JULY 2024 | OVERALL LODGING METRICS^{1,2}

OCCUPANCY RATE
50.9%



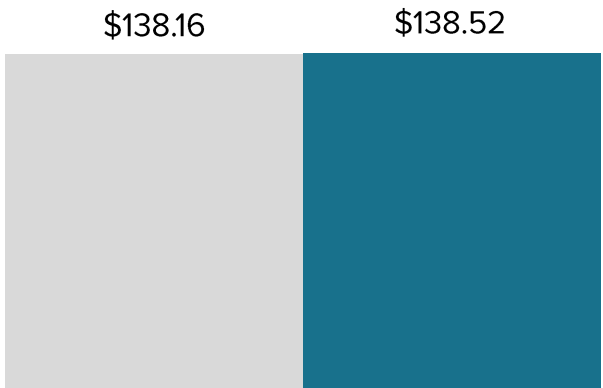
- **3.2%** from 2023

AVERAGE DAILY RATE
\$272.14



+ **3.6%** from 2023

REVENUE PER AVAILABLE ROOM
\$138.52



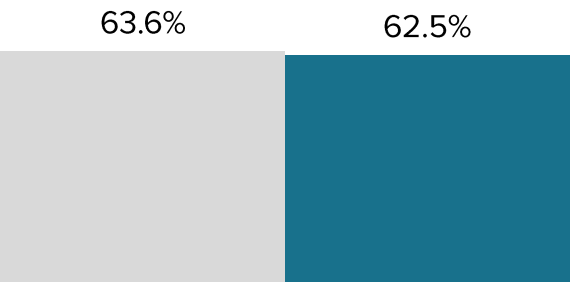
+ **0.3%** from 2023

■ July-23 ■ July-24

¹ Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.
² Overall Lodging Metrics are reflective of paid accommodations as a whole, including both hotels and vacation rentals within Collier County.

OCCUPANCY RATE³

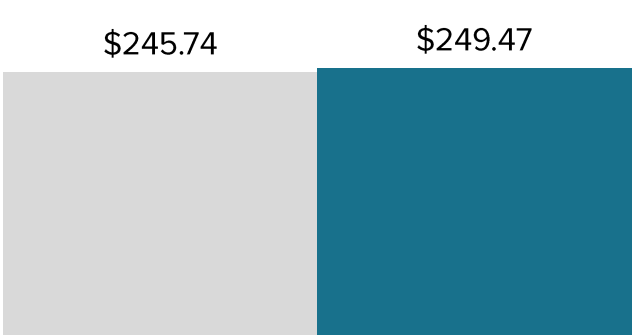
62.5%



- 1.7% from 2023

AVERAGE DAILY RATE

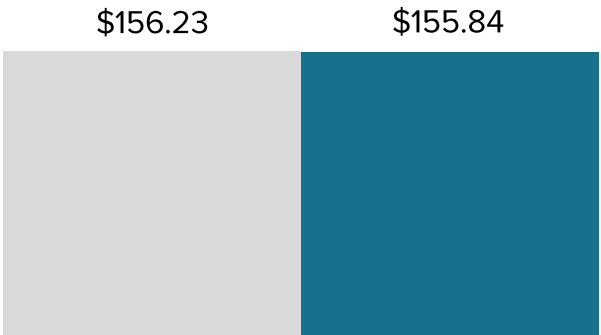
\$249.47



+ 1.5% from 2023

REVENUE PER AVAILABLE ROOM

\$155.84



- 0.3% from 2023

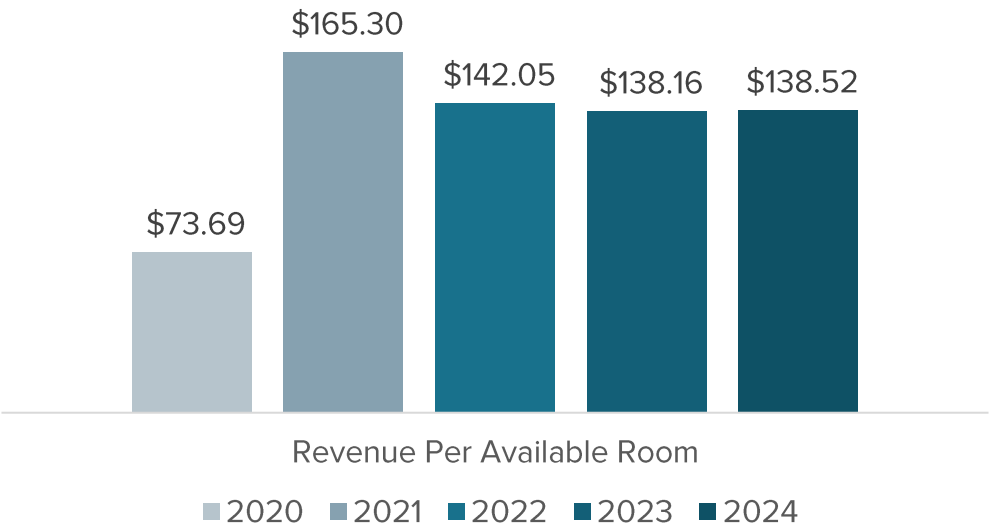
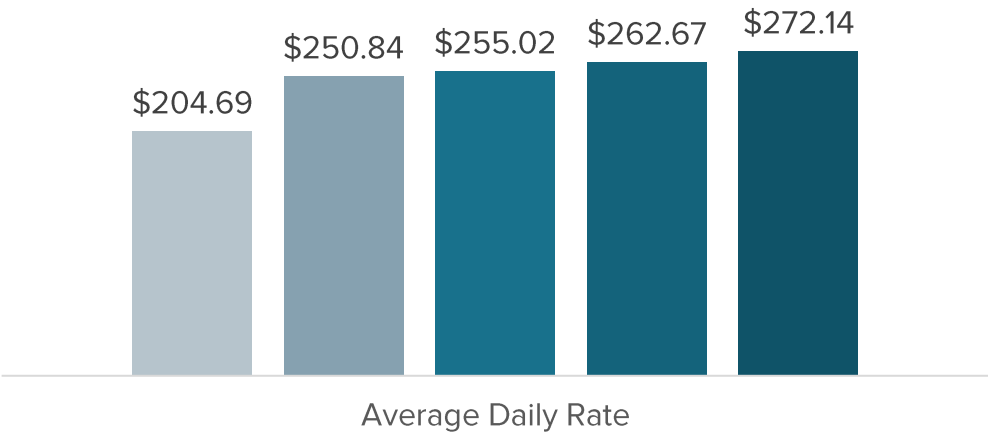
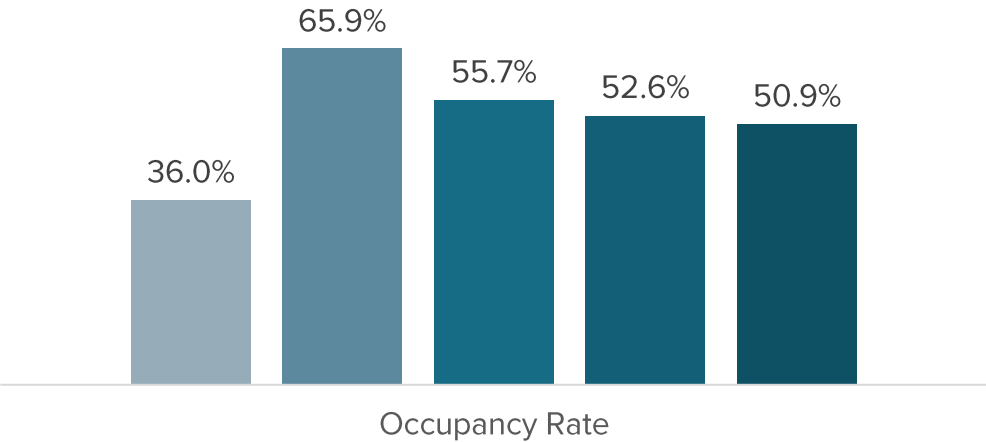
¹Source: STR data

² Lodging metrics on this slide are only reflective of the hotels within Collier County.

³ Although Occupancy Rate is down year-over-year, this is largely due to the increased number of available units in 2024. Hotel room supply increased 6.6% while demand increased 4.8%, compared to July 2023.

■ July-23 ■ July-24

JULY | OVERALL LODGING METRICS TREND¹



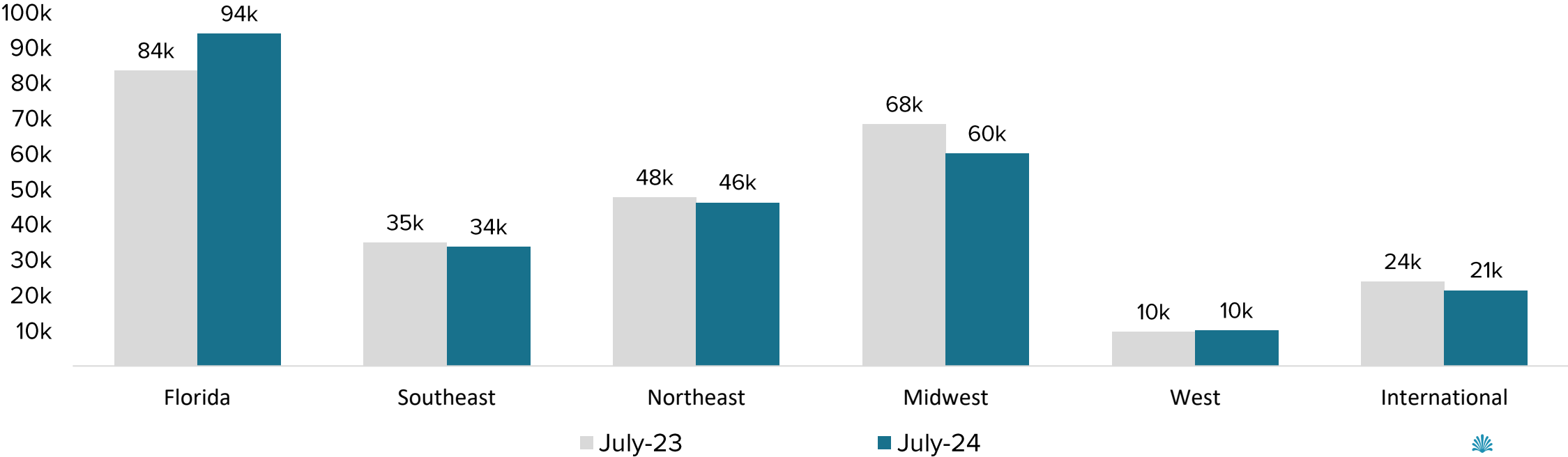
¹Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

FLORIDA VISITORS

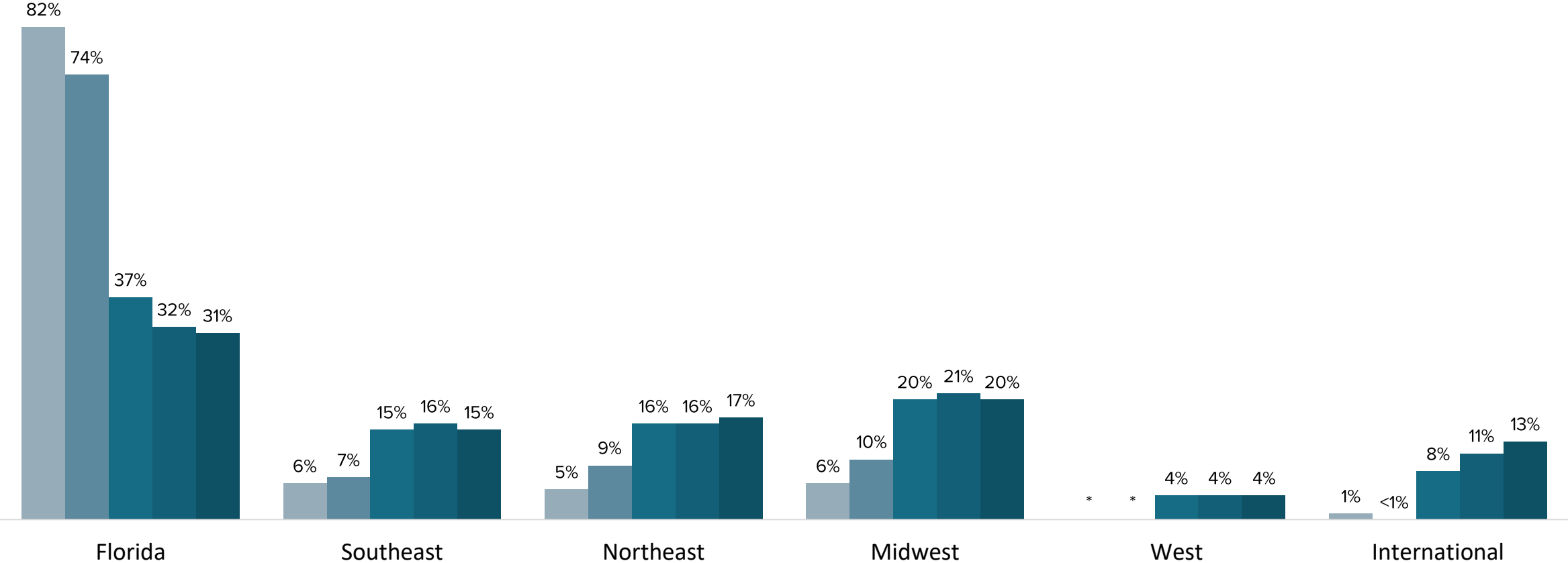
93,900

OUT-OF-STATE VISITORS

171,400



JULY | OVERNIGHT VISITOR ORIGIN TREND



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

■ July-20 ■ July-21 ■ July-22 ■ July-23 ■ July-24

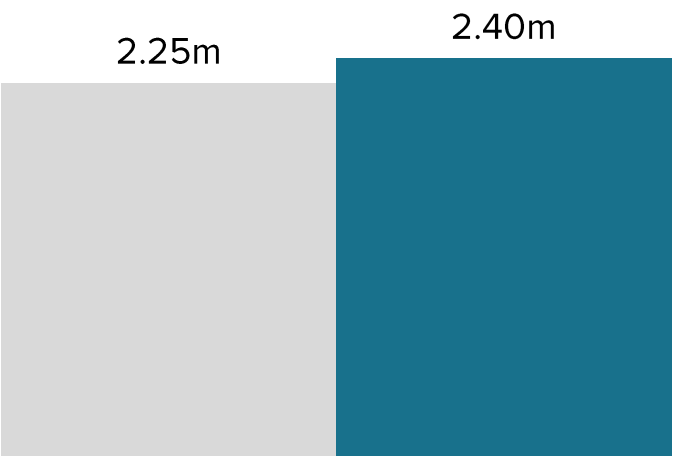


2b

EXECUTIVE
FISCAL
YEAR-TO-DATE
(FYTD)
SUMMARY

FYTD VISITORS

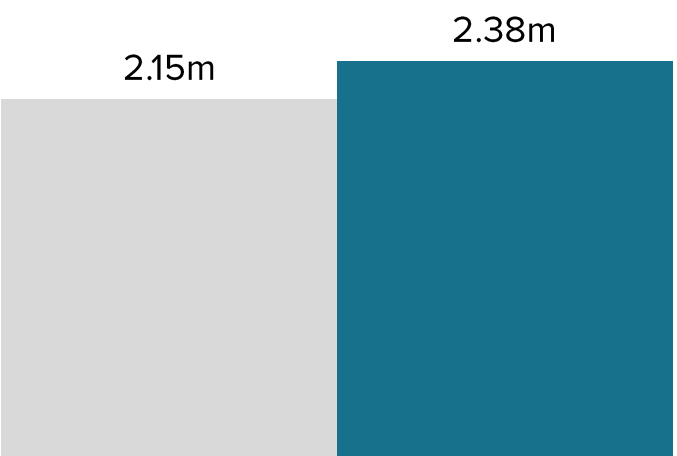
2,397,600



+ 6.6% from FY23

FYTD ROOM NIGHTS

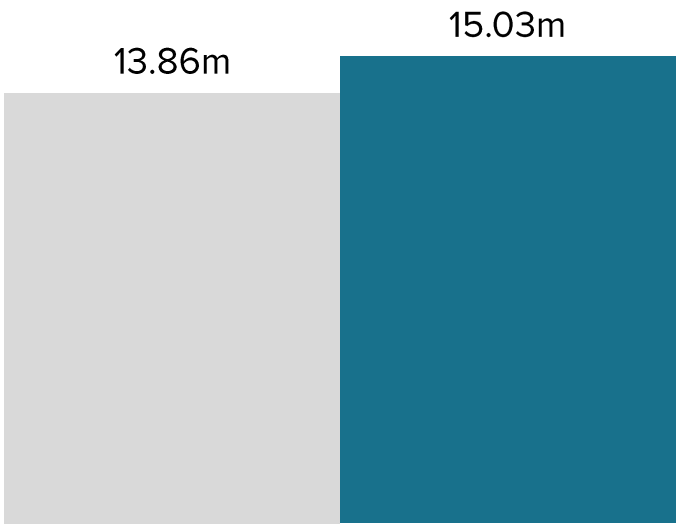
2,379,800



+ 10.7% from FY23

FYTD VISITOR DAYS

15,034,100



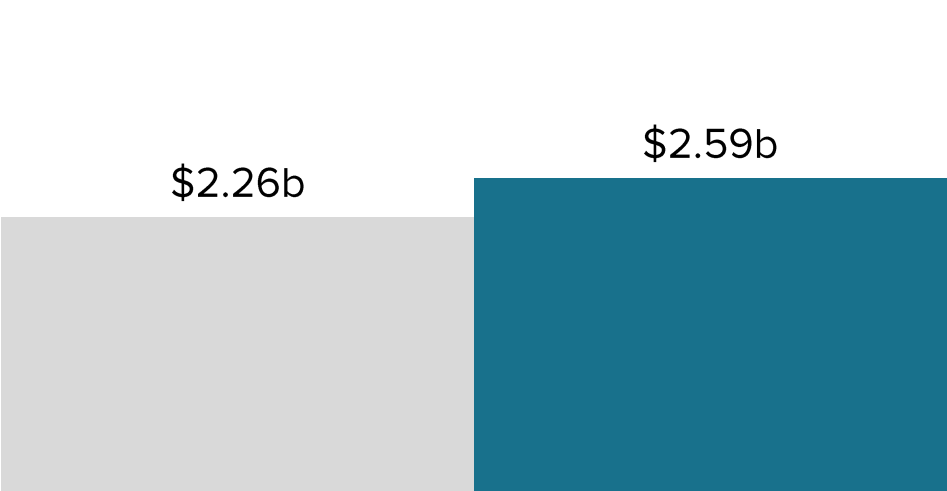
+ 8.4% from FY23

■ FY23 ■ FY24

FYTD DIRECT SPENDING

\$2,587,081,000

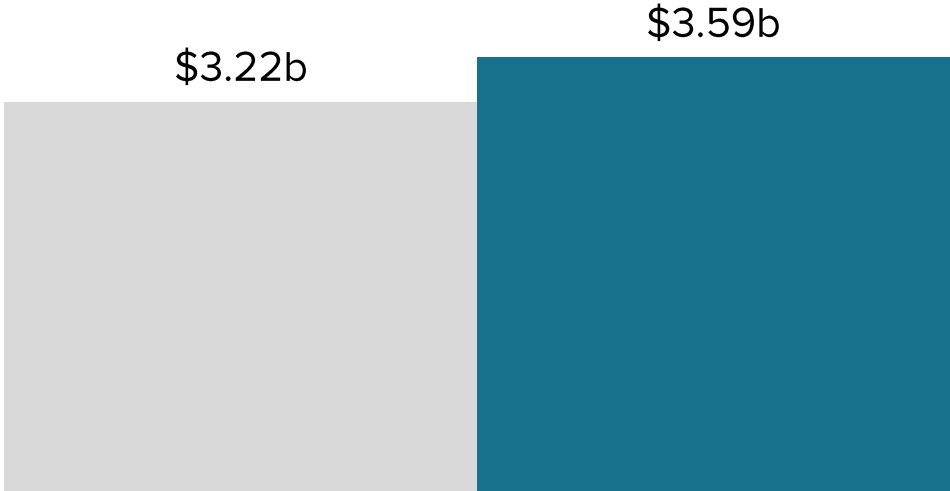
+ 14.3% from FY23



FYTD ECONOMIC IMPACT

\$3,586,886,900

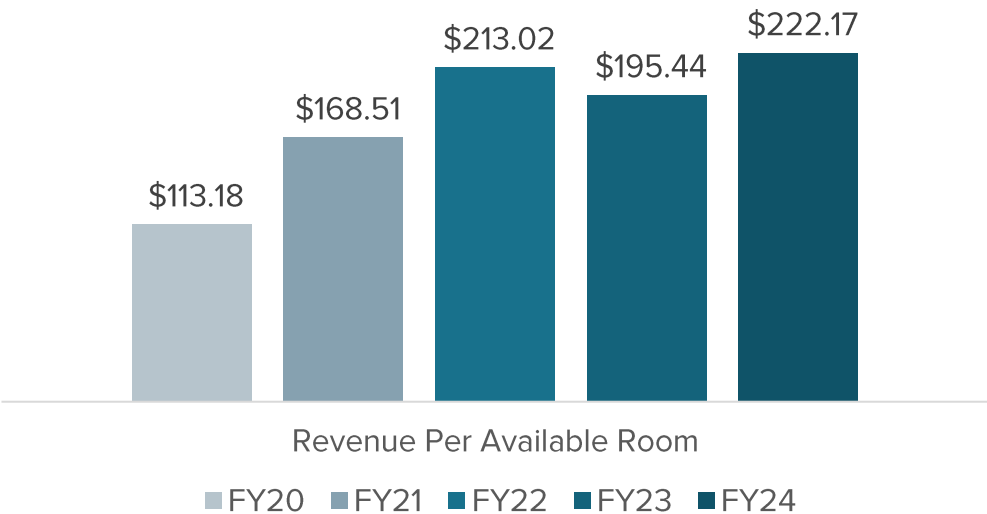
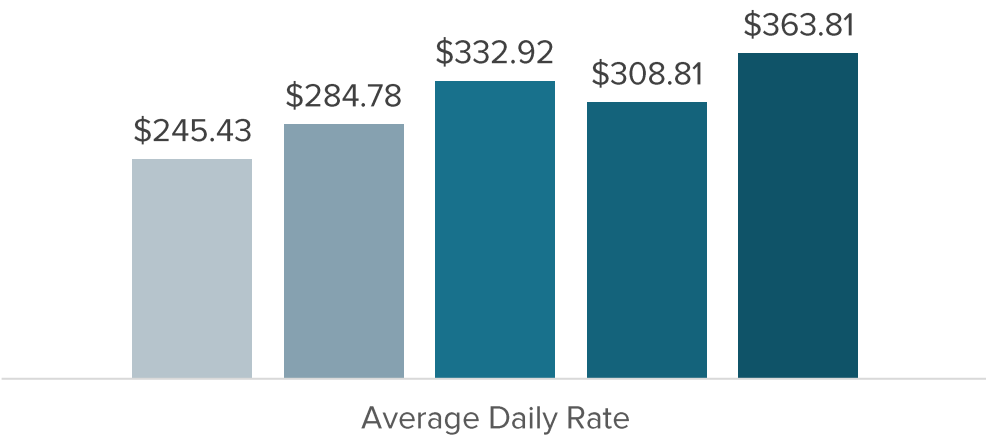
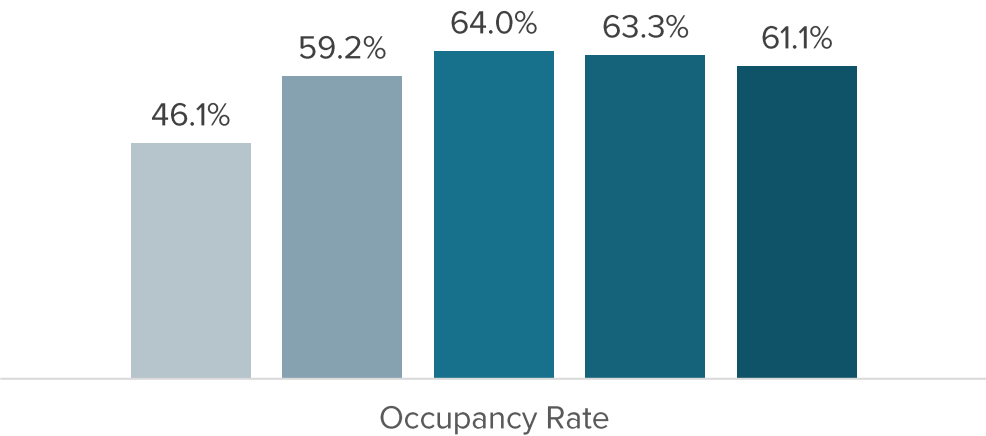
+ 11.5% from FY23¹



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

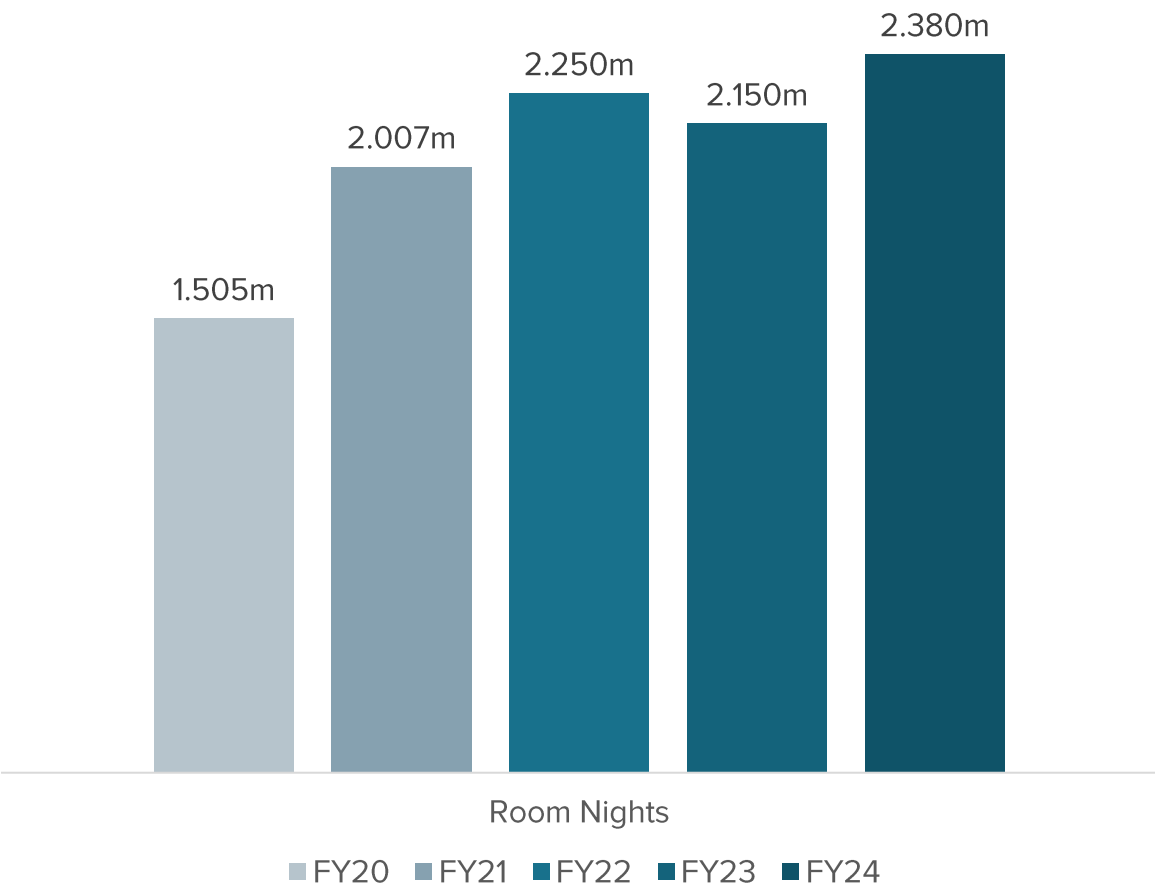
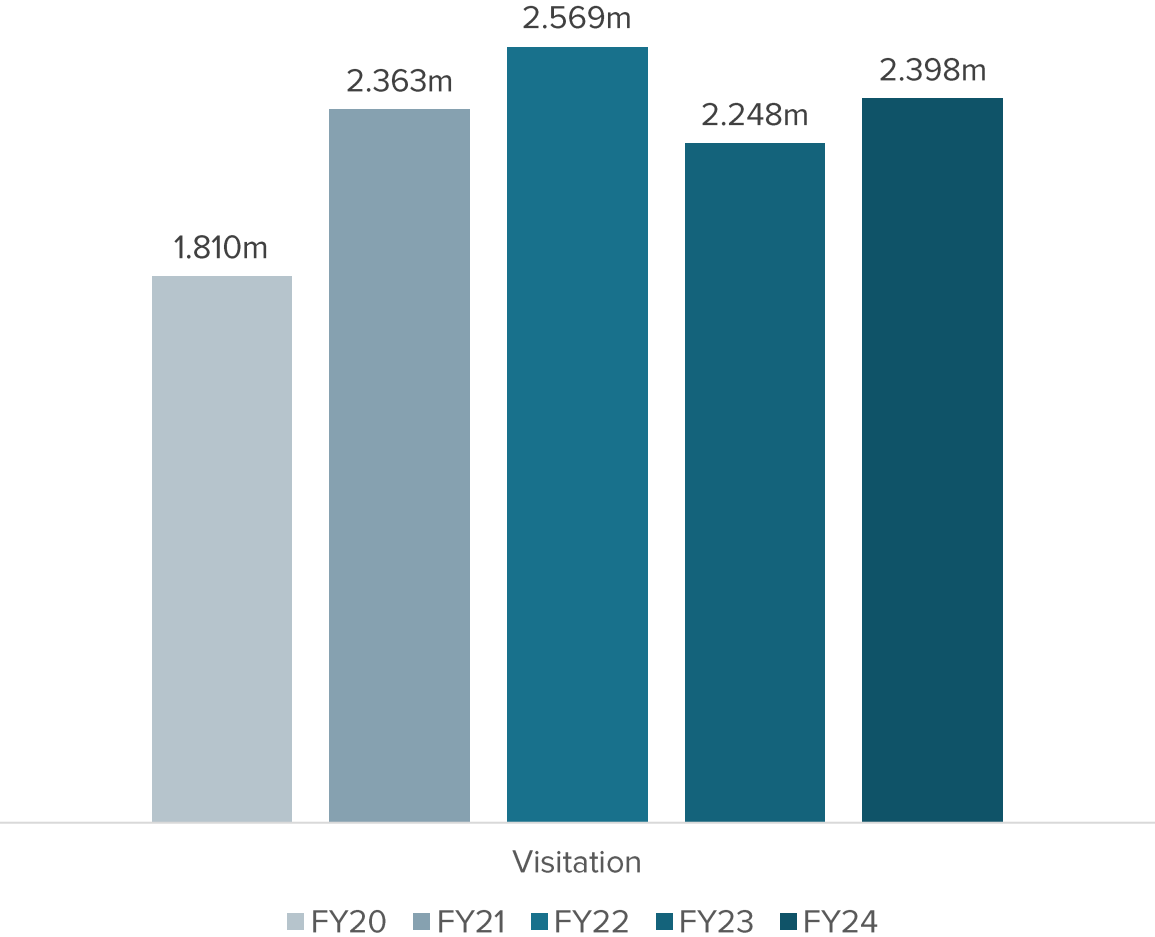
■ FY23 ■ FY24

FYTD | 2020-2024 OVERALL LODGING METRICS¹



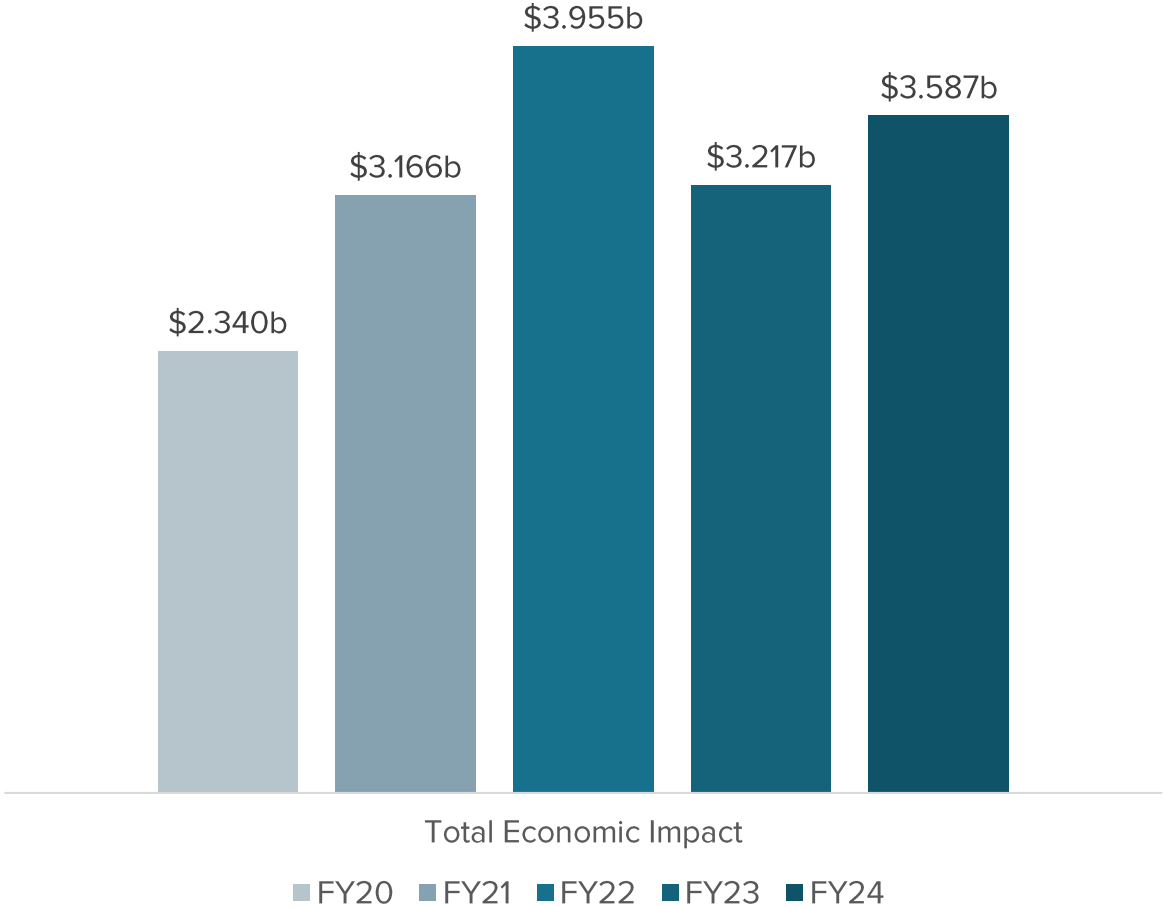
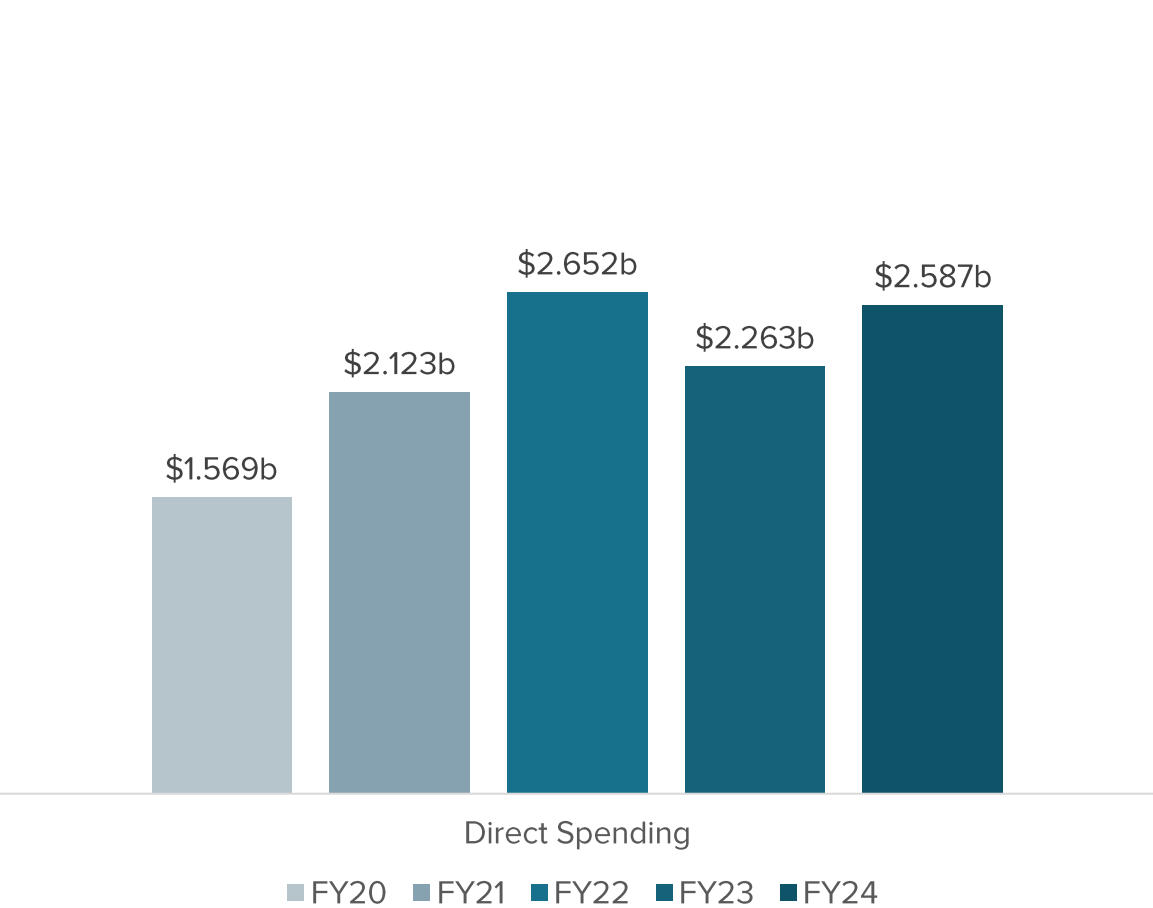
¹Sources: STR data, DSG Occupancy Study data, and AllTheRooms data.

FYTD | 2020-2024 VISITATION & ROOM NIGHTS¹



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

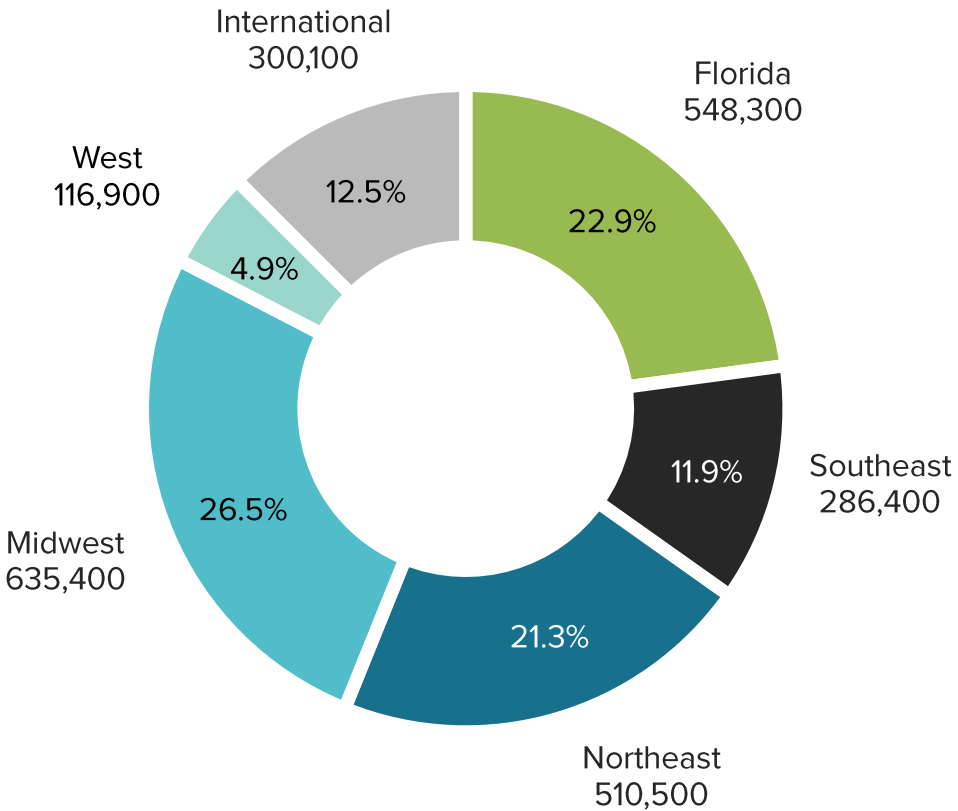
FYTD | 2020-2024 SPENDING & ECONOMIC IMPACT¹



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

FYTD | VISITOR ORIGIN

Region	FYTD 2023		FYTD 2024		Percent Change (±Δ%)	
	# Visitors	% Share	# Visitors	% Share	# Visitors	% Share
Florida	607,100	27.0%	548,300	22.9%	-9.7%	-15.3%
Southeast	229,300	10.2%	286,400	11.9%	24.9%	17.1%
Northeast	446,400	19.9%	510,500	21.3%	14.4%	7.2%
Midwest	617,000	27.4%	635,400	26.5%	3.0%	-3.4%
West	112,500	5.0%	116,900	4.9%	3.9%	-2.6%
Canada	98,100	4.4%	109,200	4.5%	11.3%	4.4%
Europe	80,900	3.6%	130,800	5.5%	61.7%	51.6%
C/S America	31,700	1.4%	34,600	1.4%	9.1%	2.4%
Other	25,400	1.1%	25,500	1.1%	0.4%	-5.9%
Total	2,248,400	100.0%	2,397,600	100.0%		

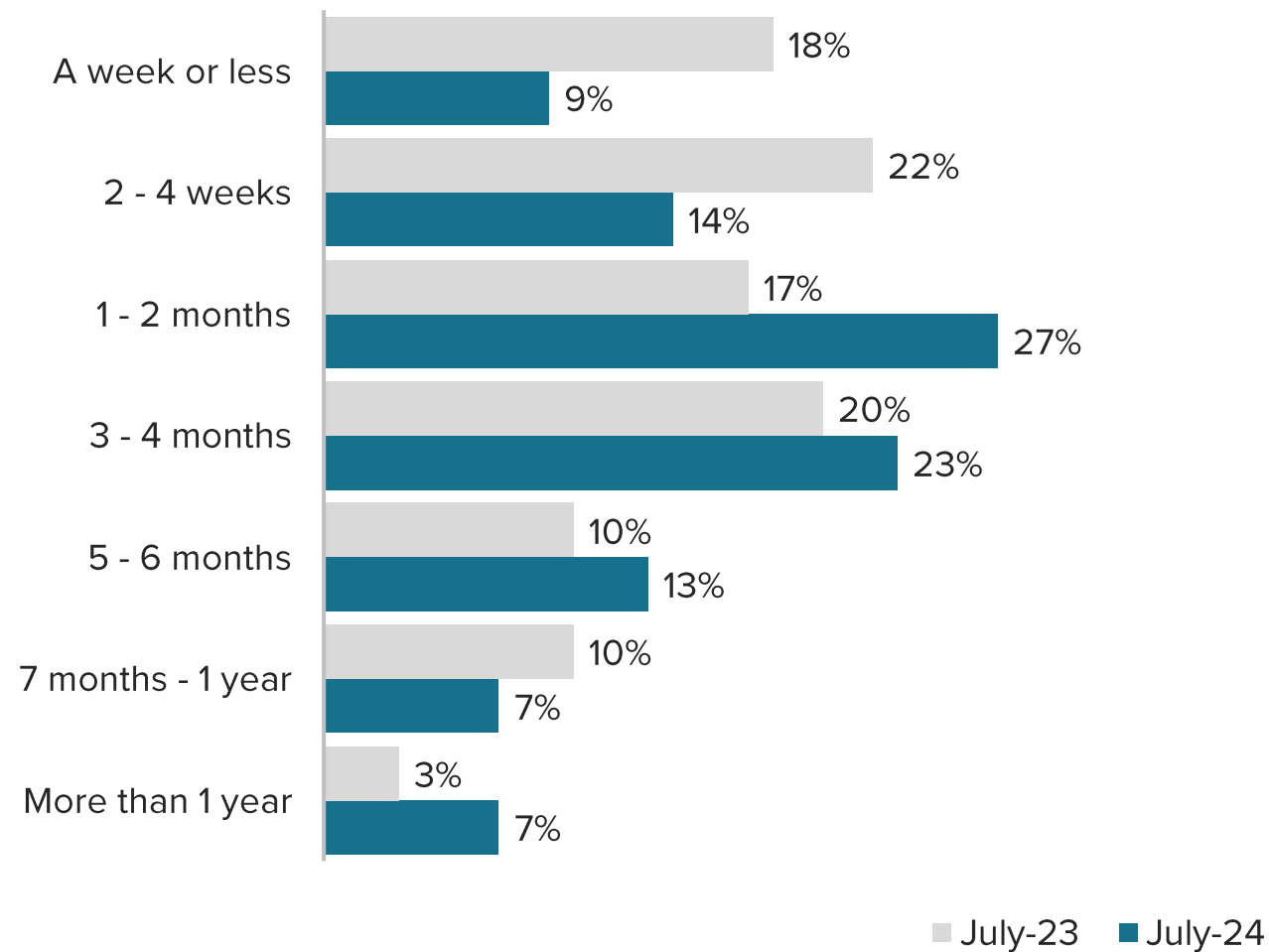




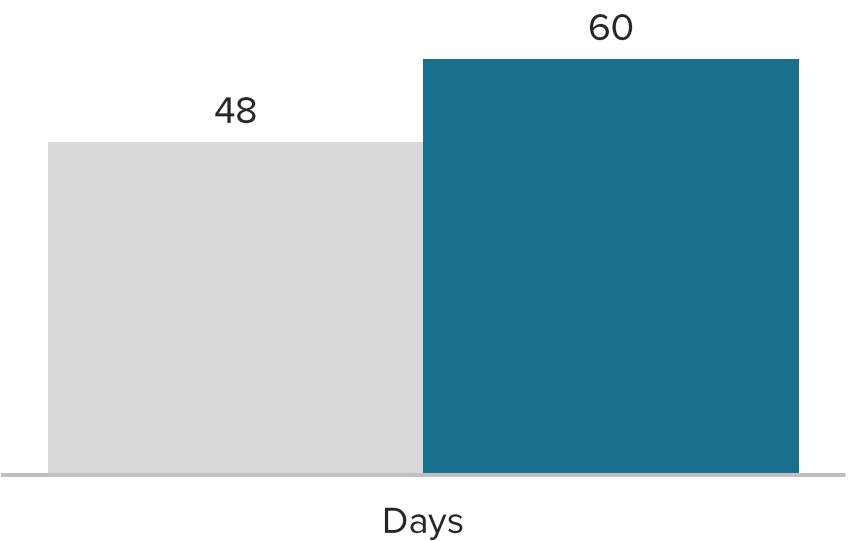
3a

DETAILED FINDINGS:
PRE-VISIT

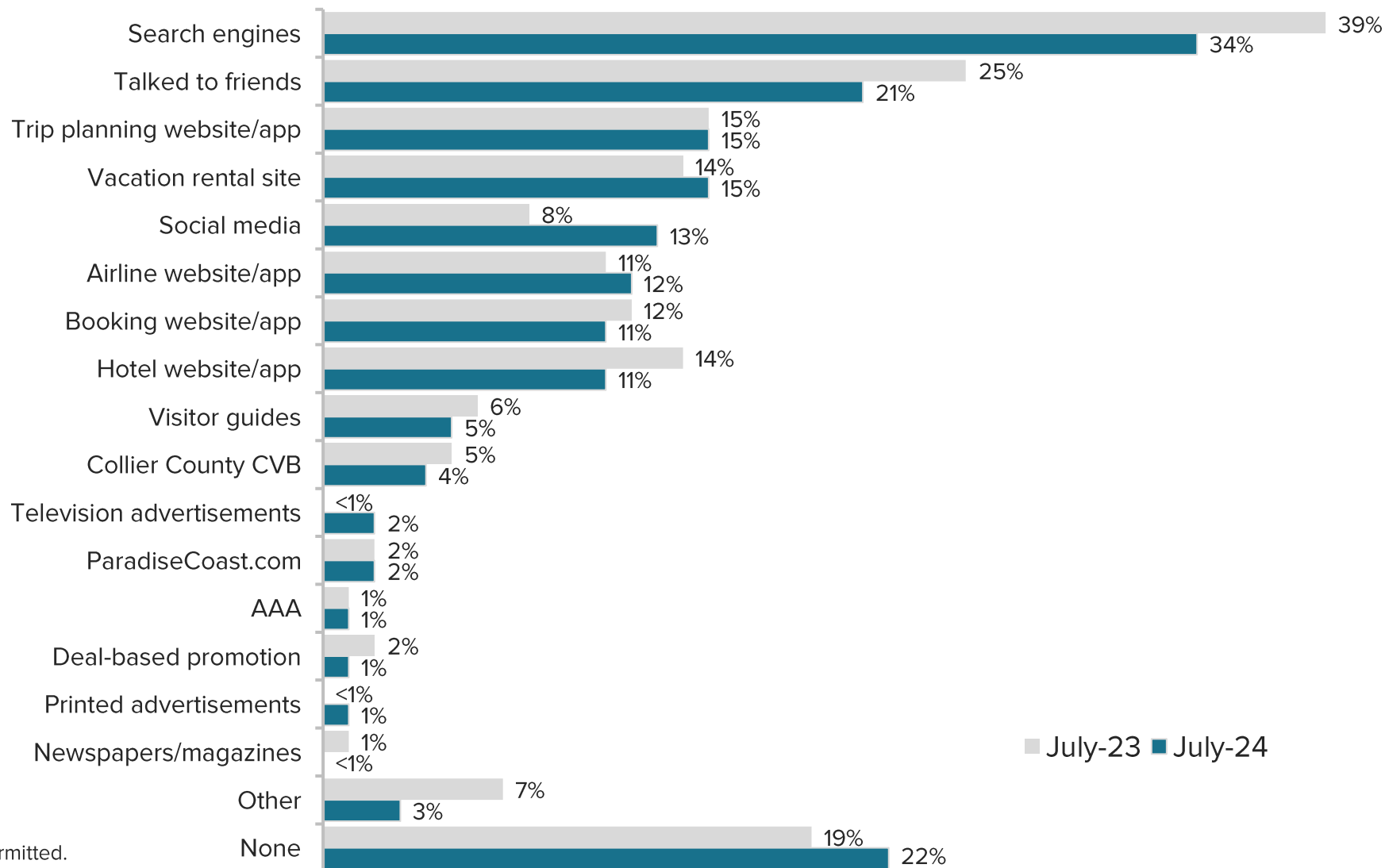
DETAILED FINDINGS | TRIP PLANNING CYCLE



Median Trip Planning Time



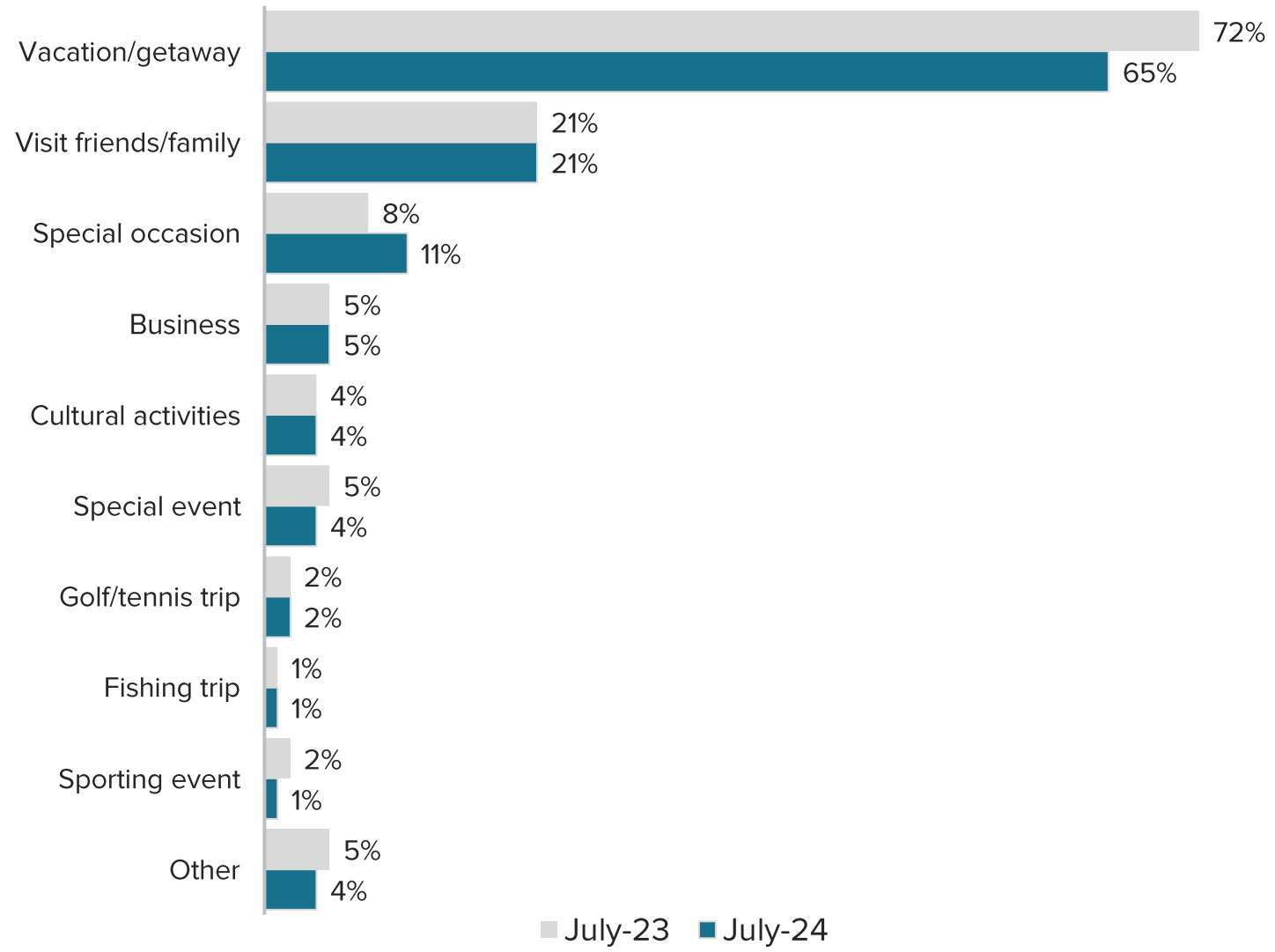
DETAILED FINDINGS | TRIP PLANNING SOURCES¹



■ July-23 ■ July-24

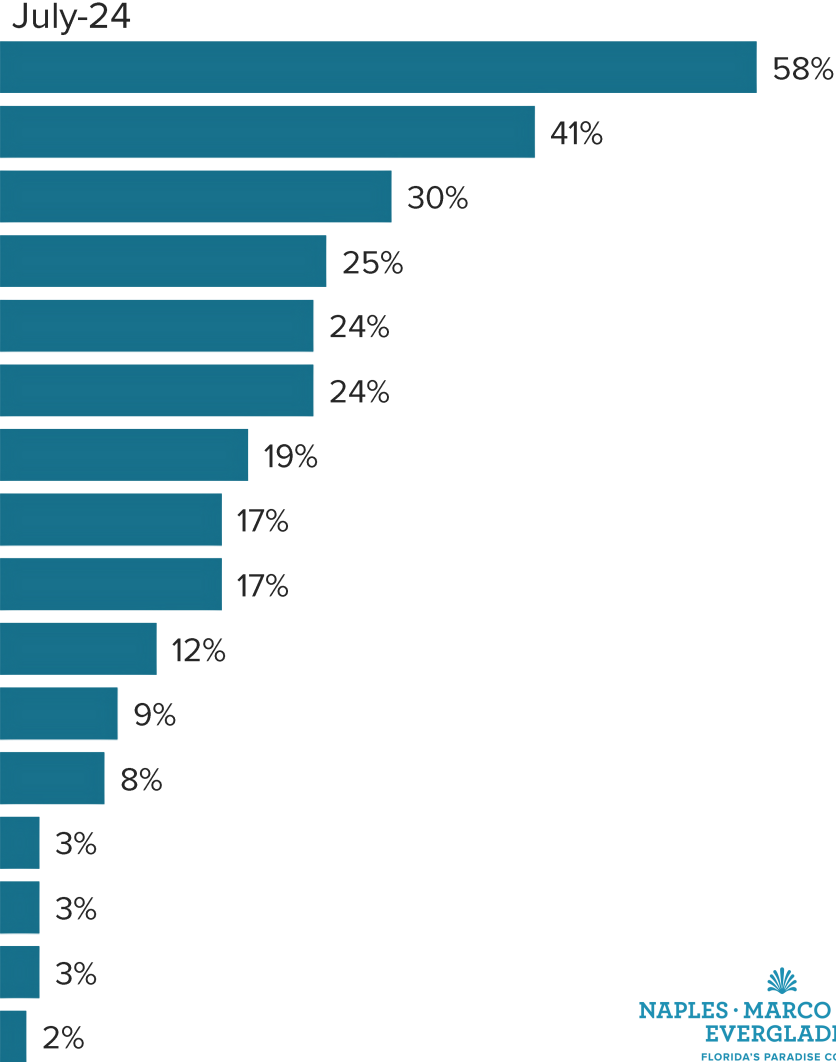
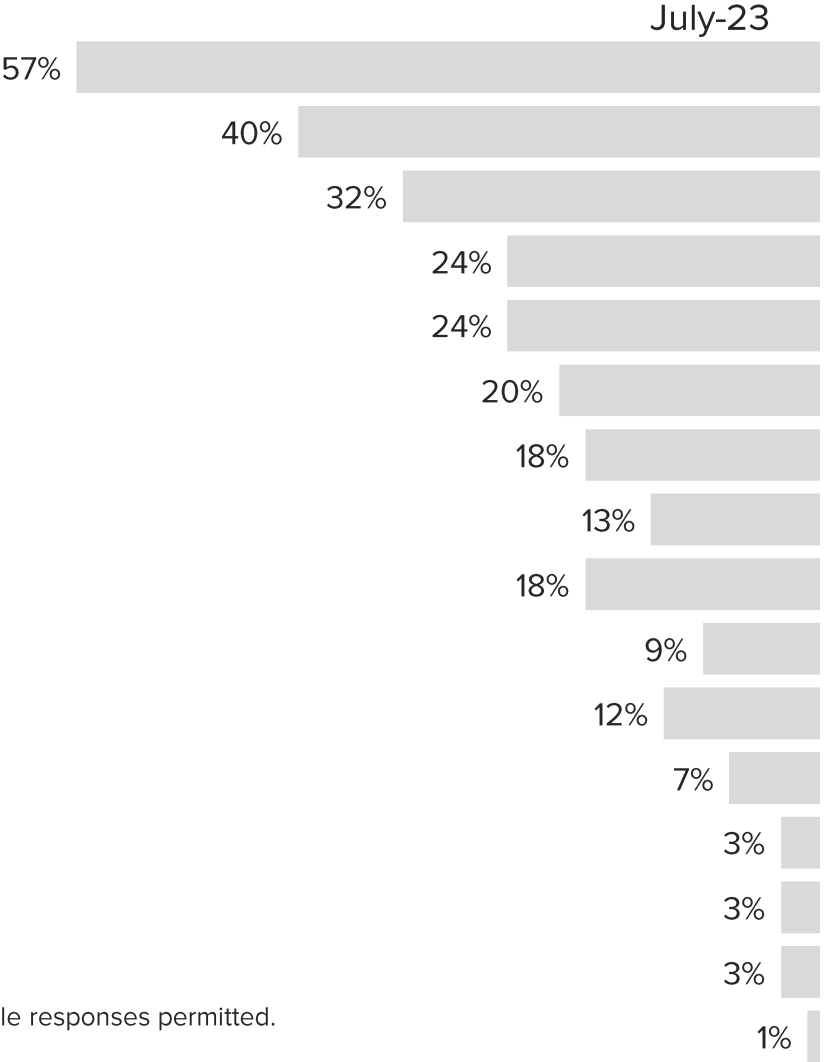
¹Multiple responses permitted.

DETAILED FINDINGS | REASONS FOR VISITING¹



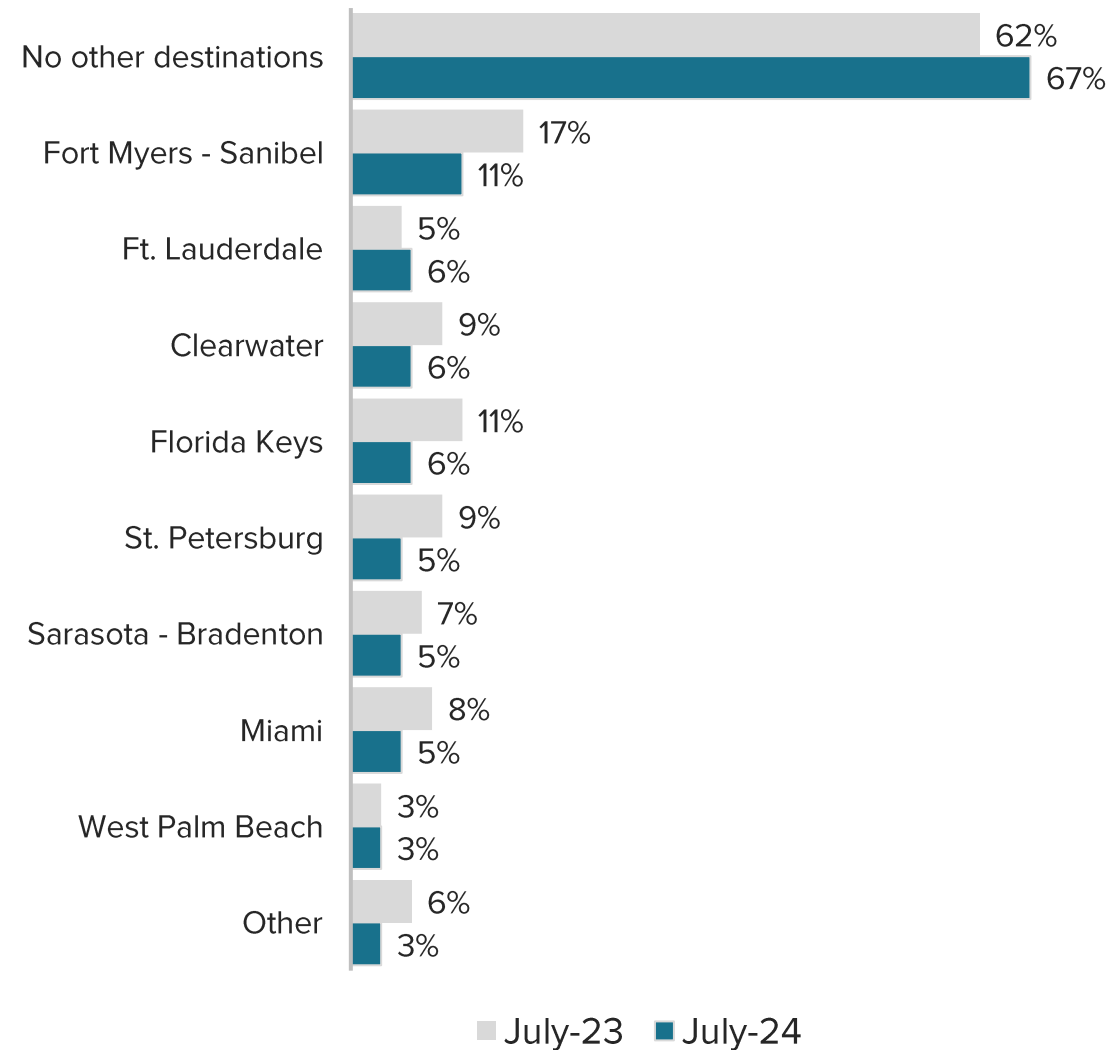
¹Multiple responses permitted.

DETAILED FINDINGS | REASONS FOR CHOOSING¹



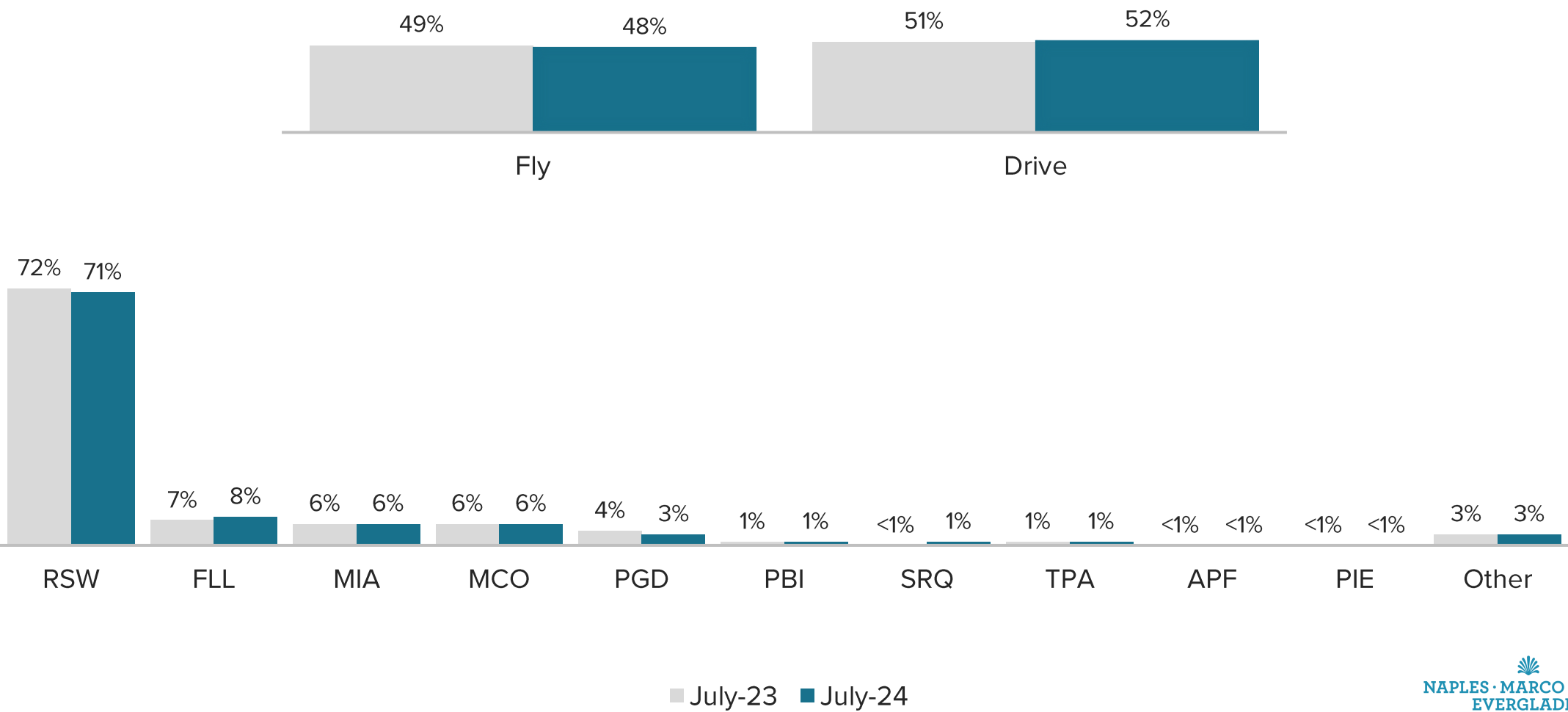
¹Multiple responses permitted.

DETAILED FINDINGS | DESTINATIONS CONSIDERED¹



¹Multiple responses permitted.

DETAILED FINDINGS | TRANSPORTATION

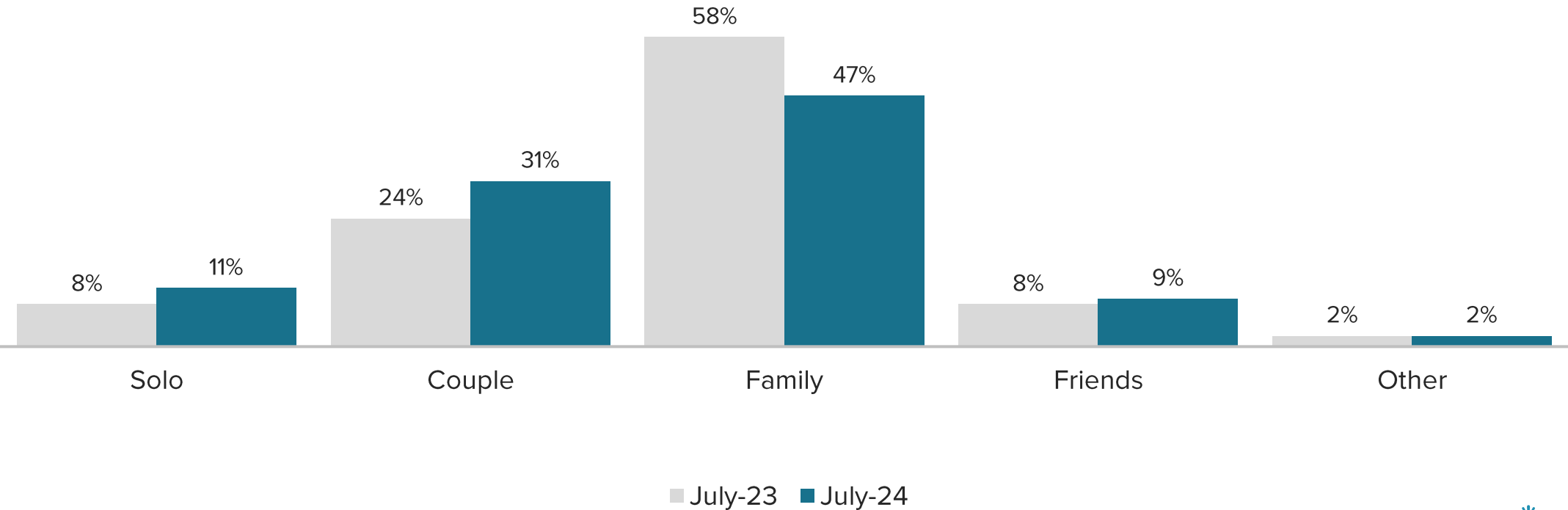


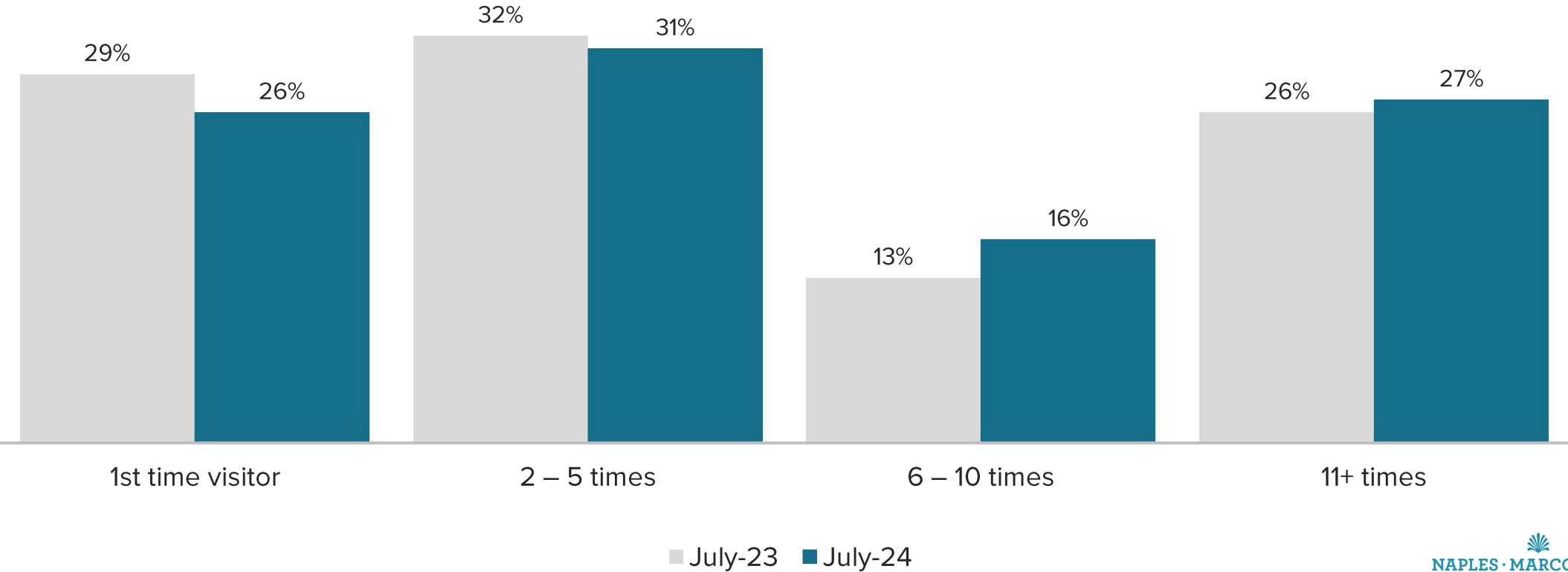


3b

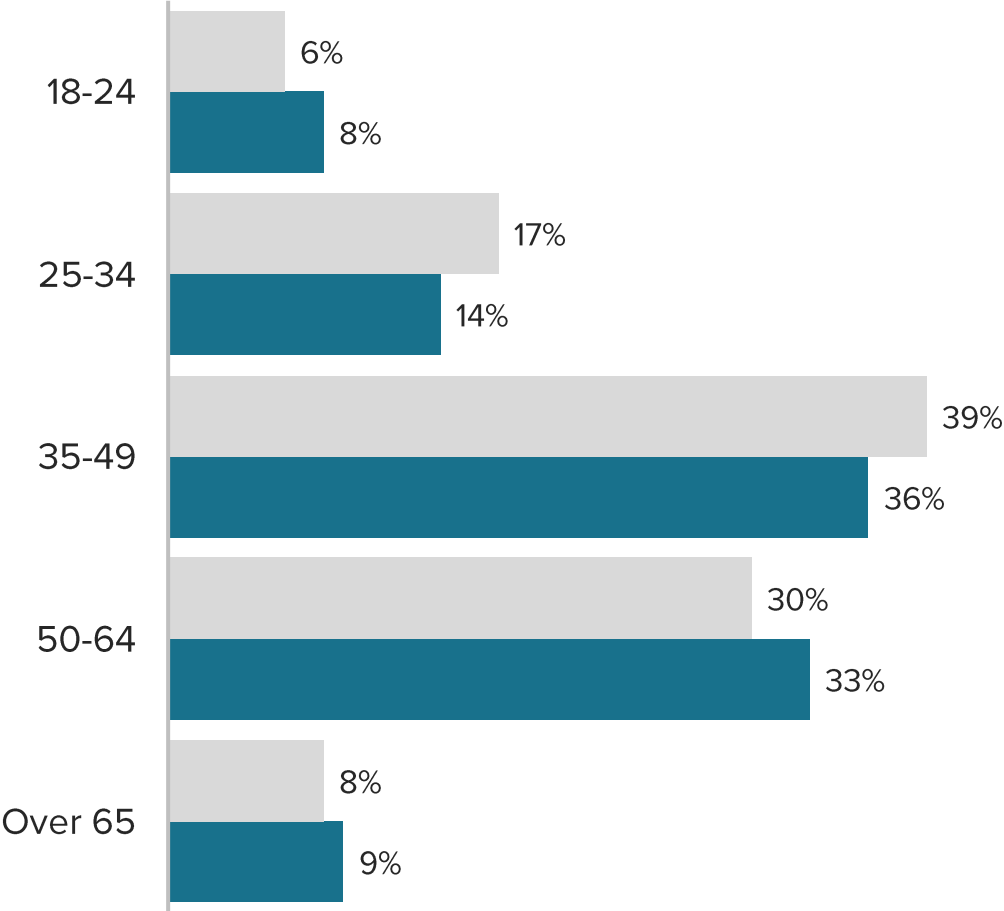
DETAILED FINDINGS:
TRAVEL PARTY
PROFILE

DETAILED FINDINGS | TRAVEL PARTY TYPE



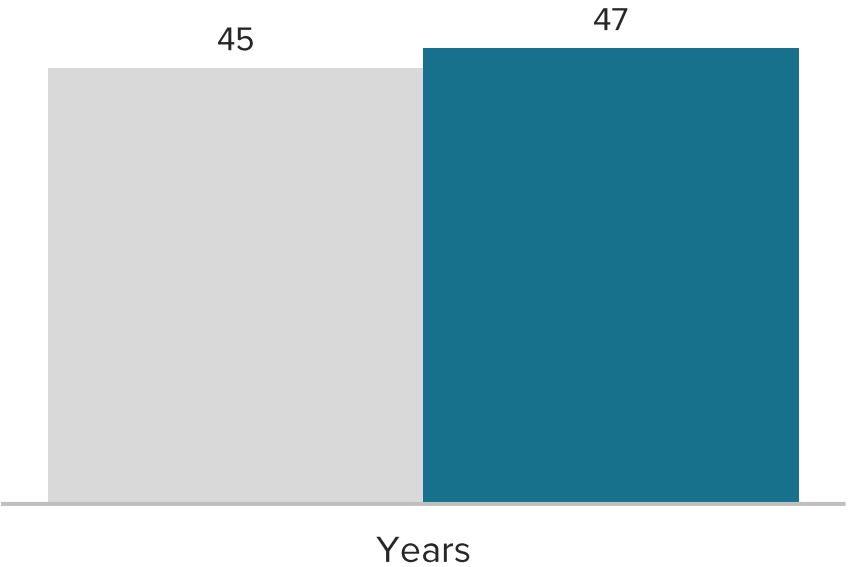


DETAILED FINDINGS | VISITOR AGES

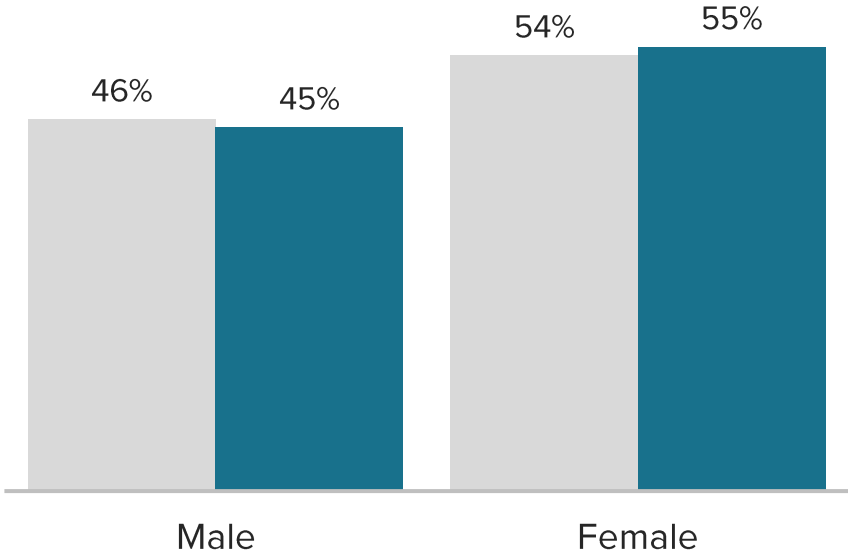
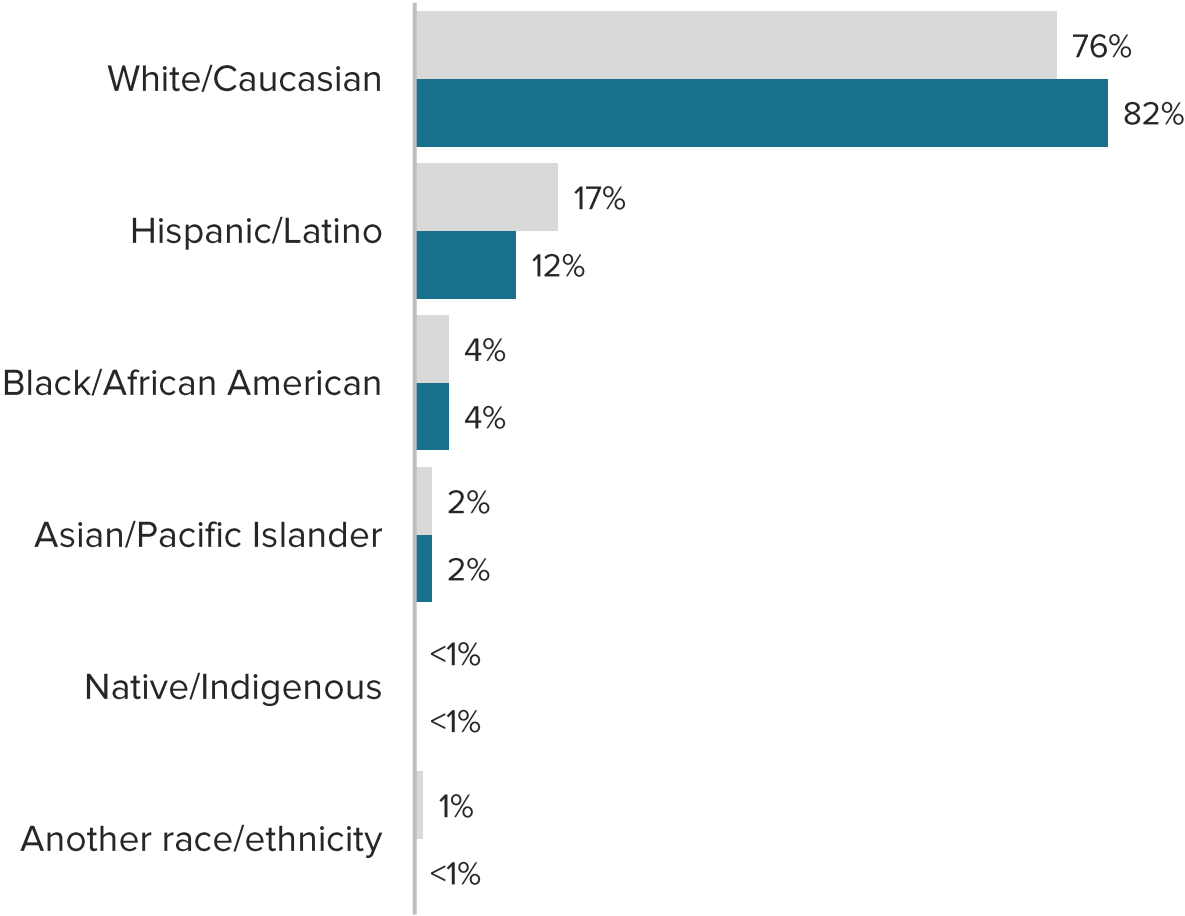


■ July-23 ■ July-24

Median Age

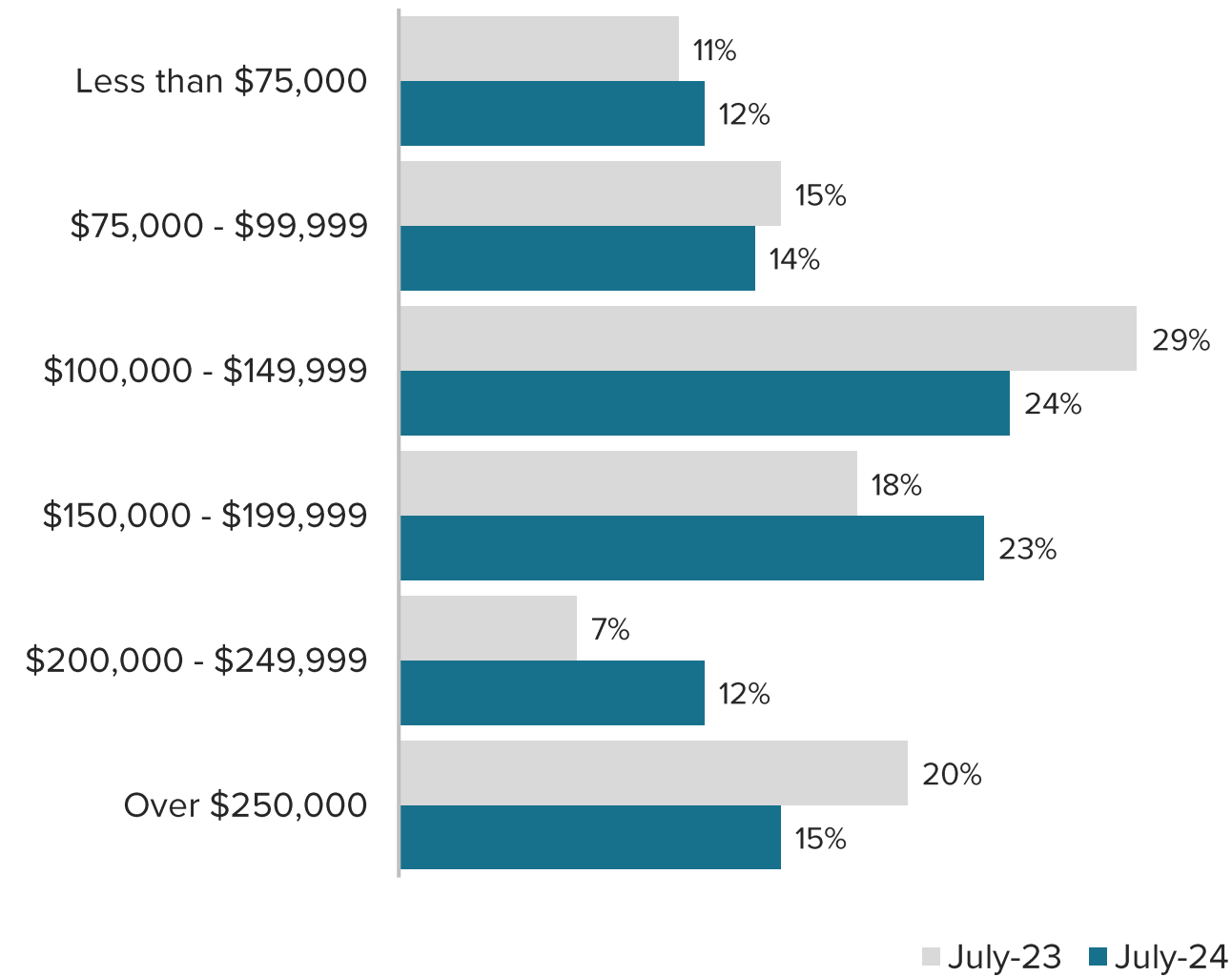


DETAILED FINDINGS | VISITOR RACE & GENDER¹

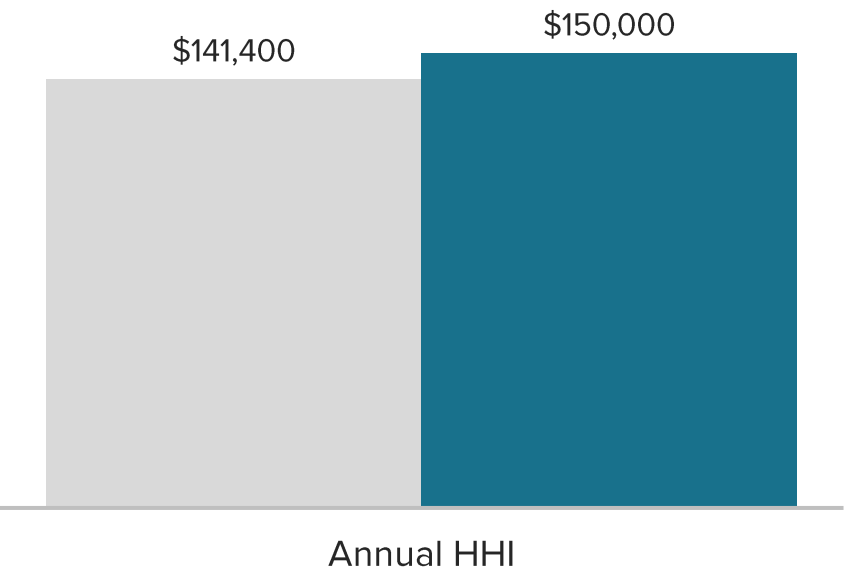


¹Of person interviewed. Females are generally more likely to agree to participate in survey research.

■ July-23 ■ July-24



Median Household Income



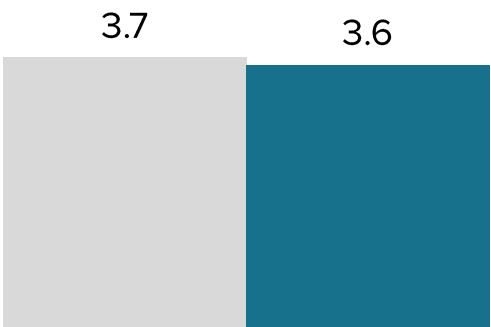


3c

DETAILED FINDINGS:
TRIP
EXPERIENCE

TRAVEL PARTY SIZE

3.6

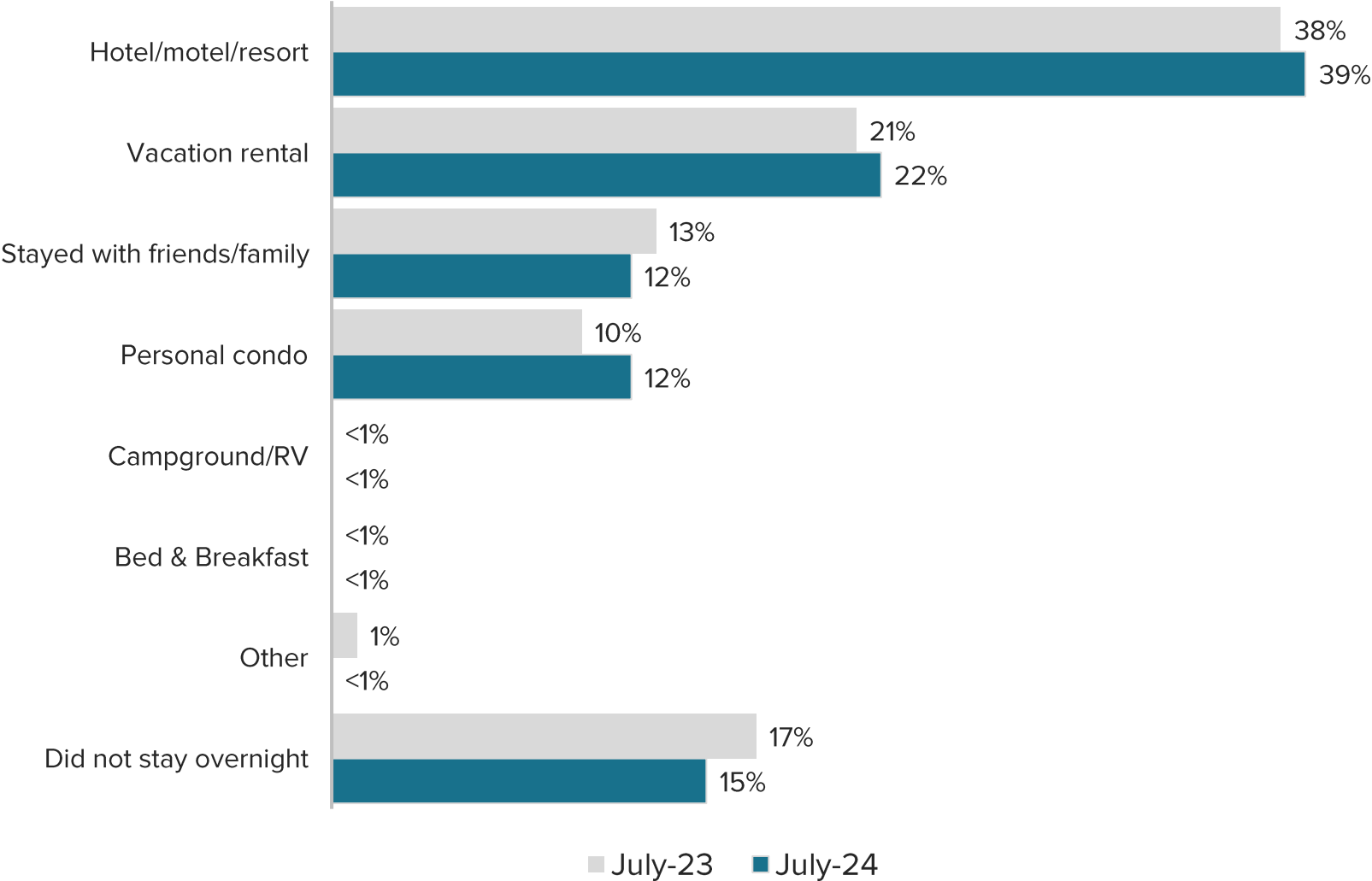


NIGHTS STAYED

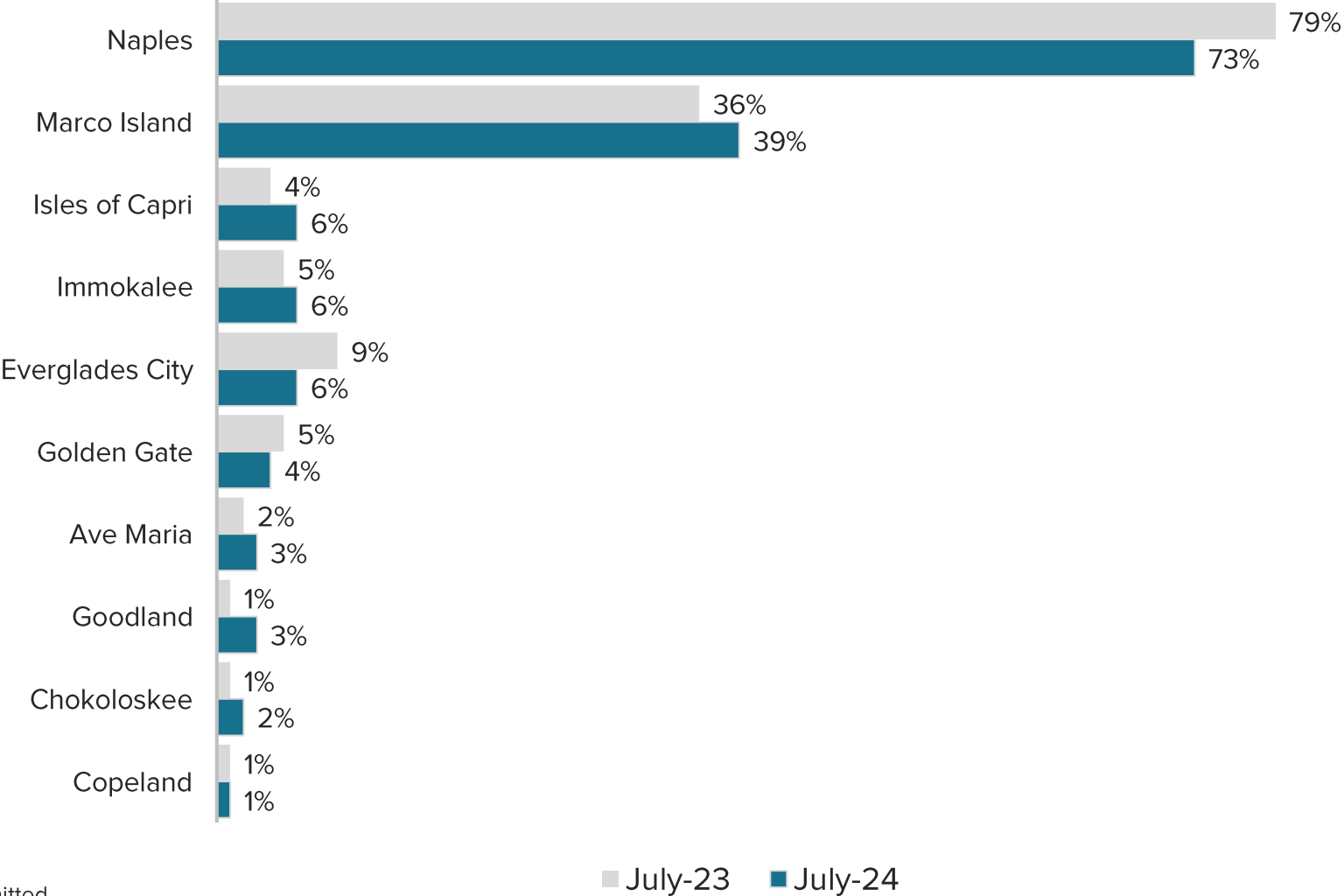
4.8



■ July-23 ■ July-24

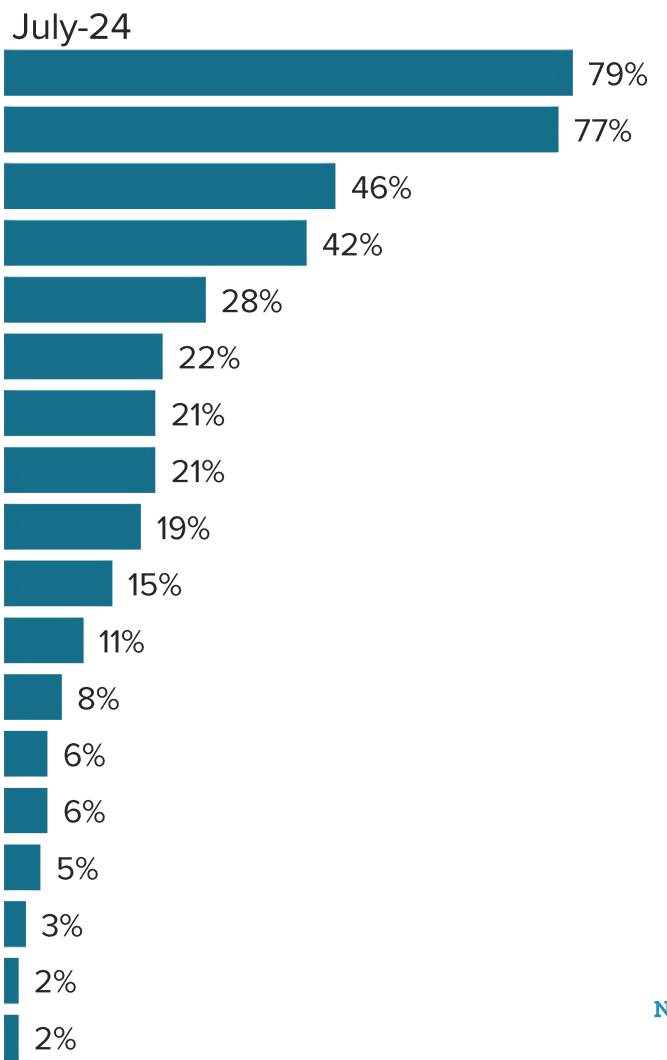
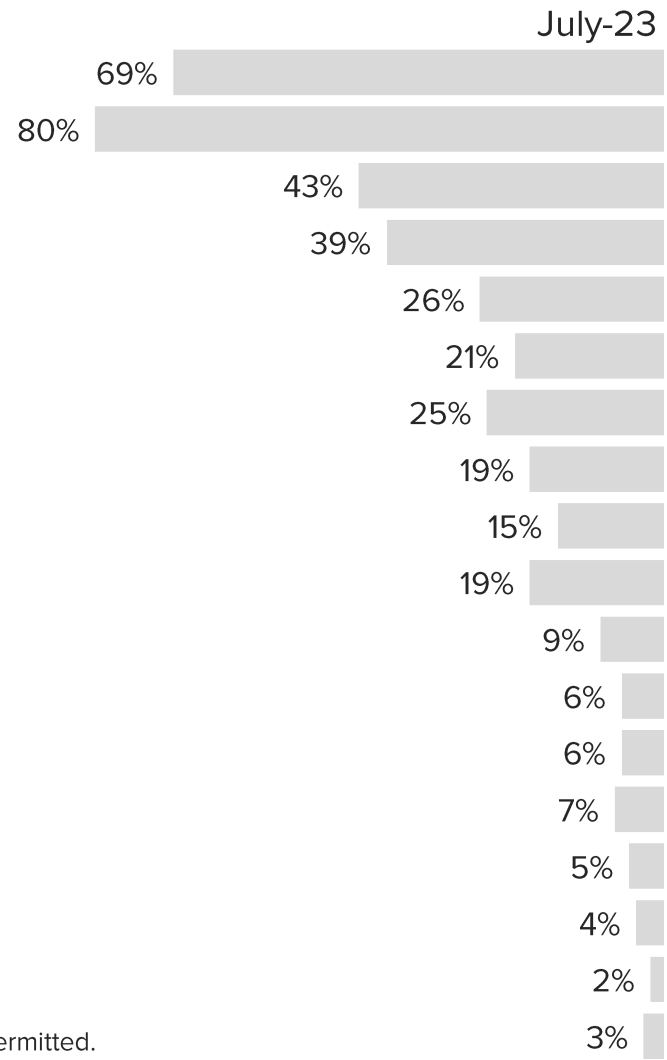


DETAILED FINDINGS | AREAS VISITED¹



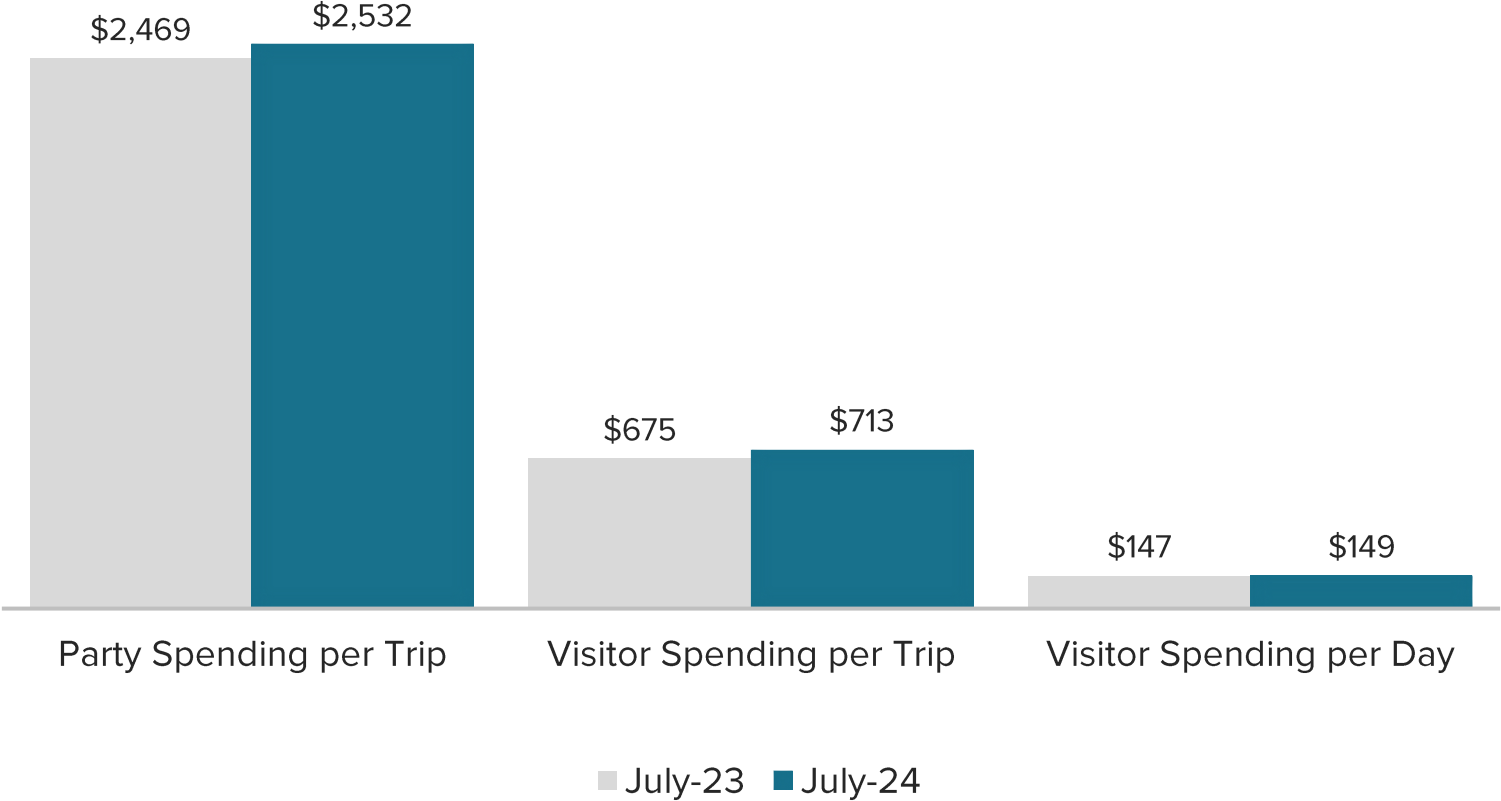
¹Multiple responses permitted.

DETAILED FINDINGS | TRIP ACTIVITIES¹



¹Multiple responses permitted.

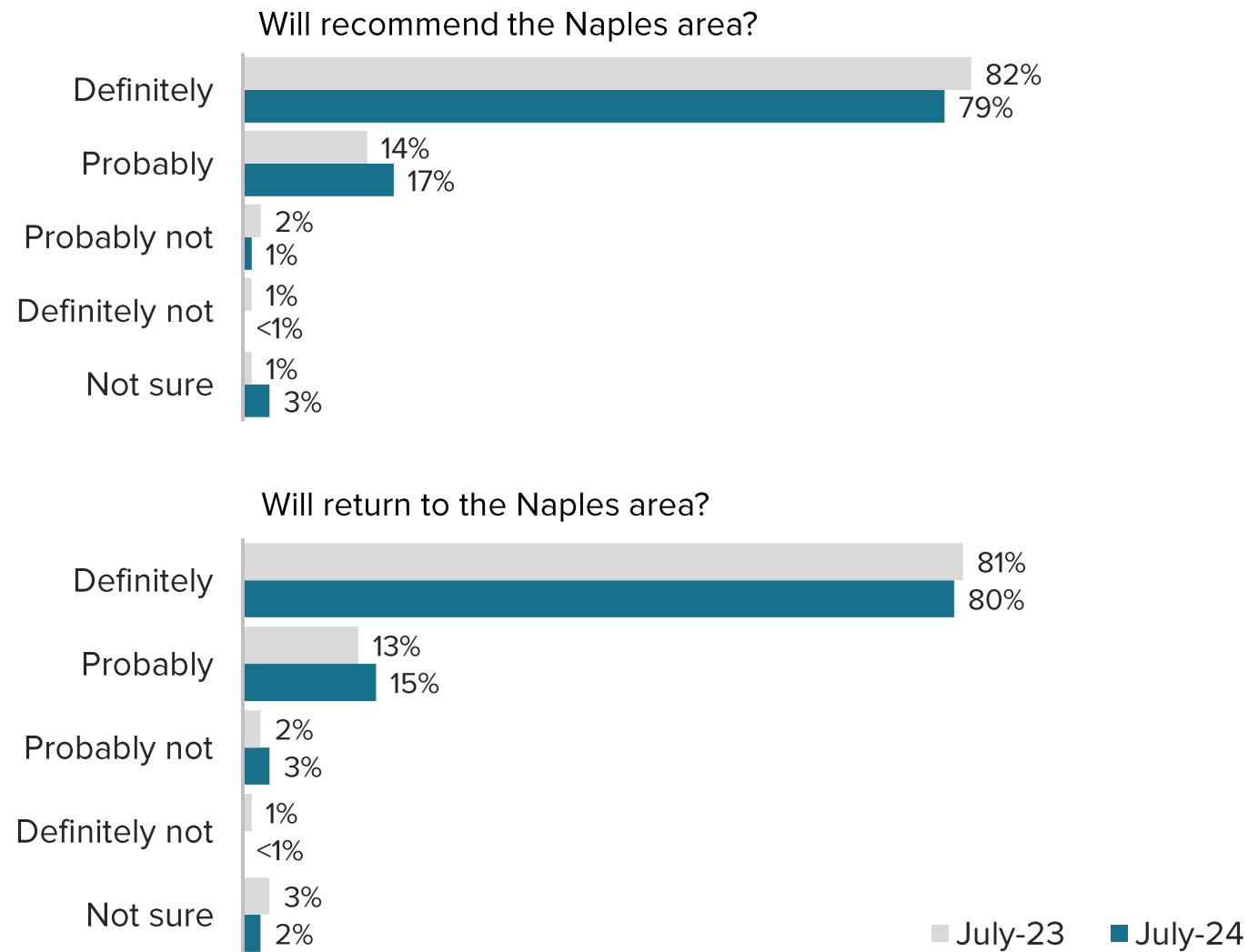
DETAILED FINDINGS | VISITOR SPENDING



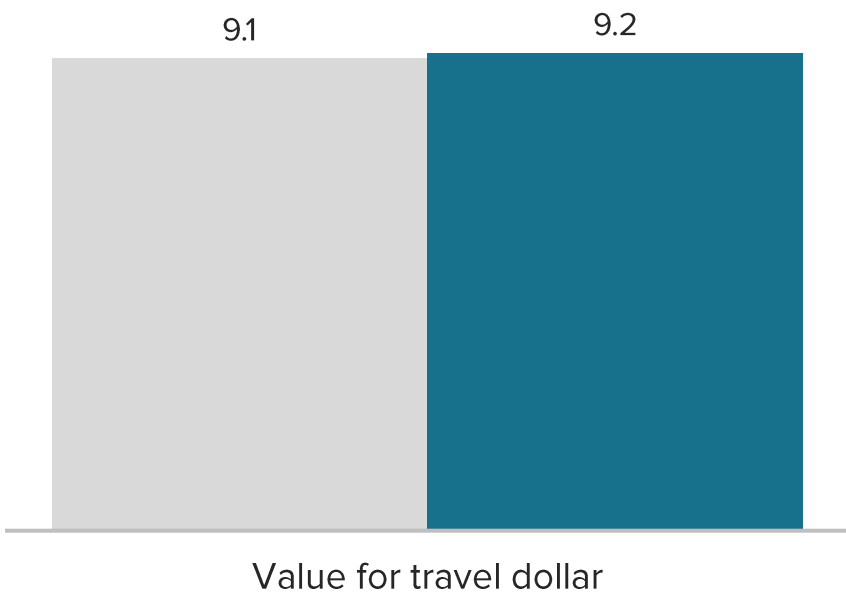


3d

DETAILED FINDINGS:
POST-TRIP
EVALUATION



VALUE FOR TRAVEL DOLLAR^{1,2}



¹10-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.



4a

MONTHLY
DESTINATION
COMPARISONS
(NOT UPDATED
W/ JULY DATA YET)



4b

CALENDAR YTD
DESTINATION
COMPARISONS
(NOT UPDATED
W/ JULY DATA YET)



4c

FISCAL YTD
DESTINATION
COMPARISONS
(NOT UPDATED
W/ JULY DATA YET)

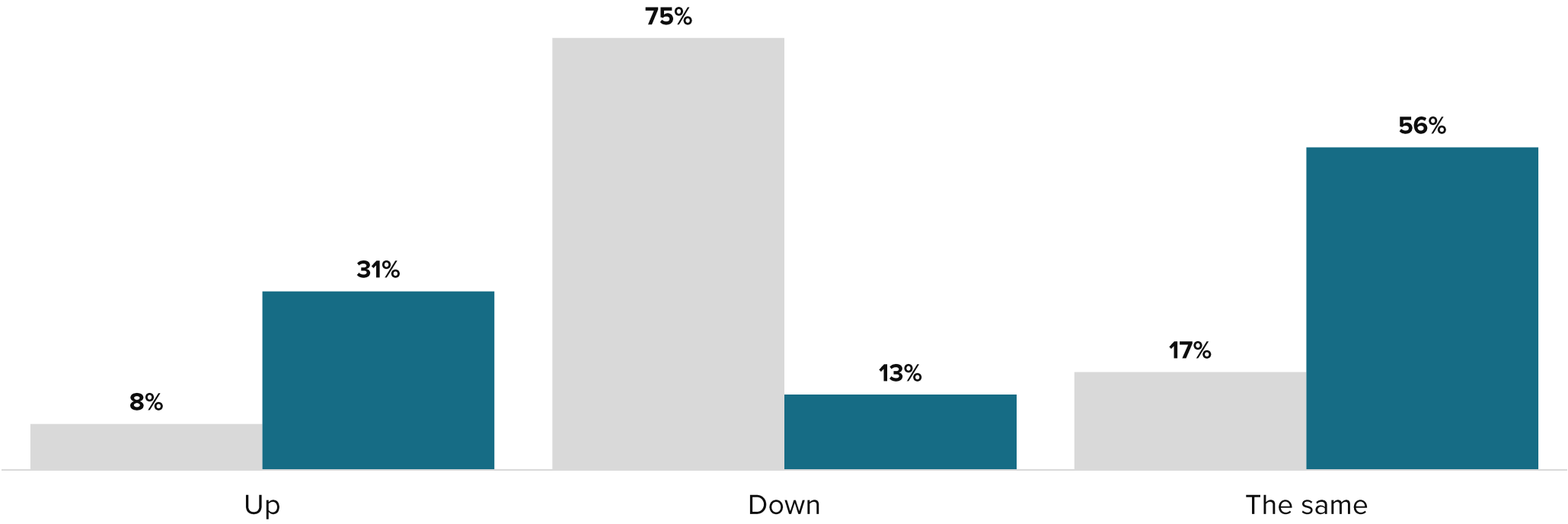


5

OCCUPANCY
BAROMETER

OCCUPANCY BAROMETER¹ | AUG - OCT

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



¹Source: Data provided by Collier County hotel and vacation rental partners who respond to DSG's Monthly Occupancy Survey

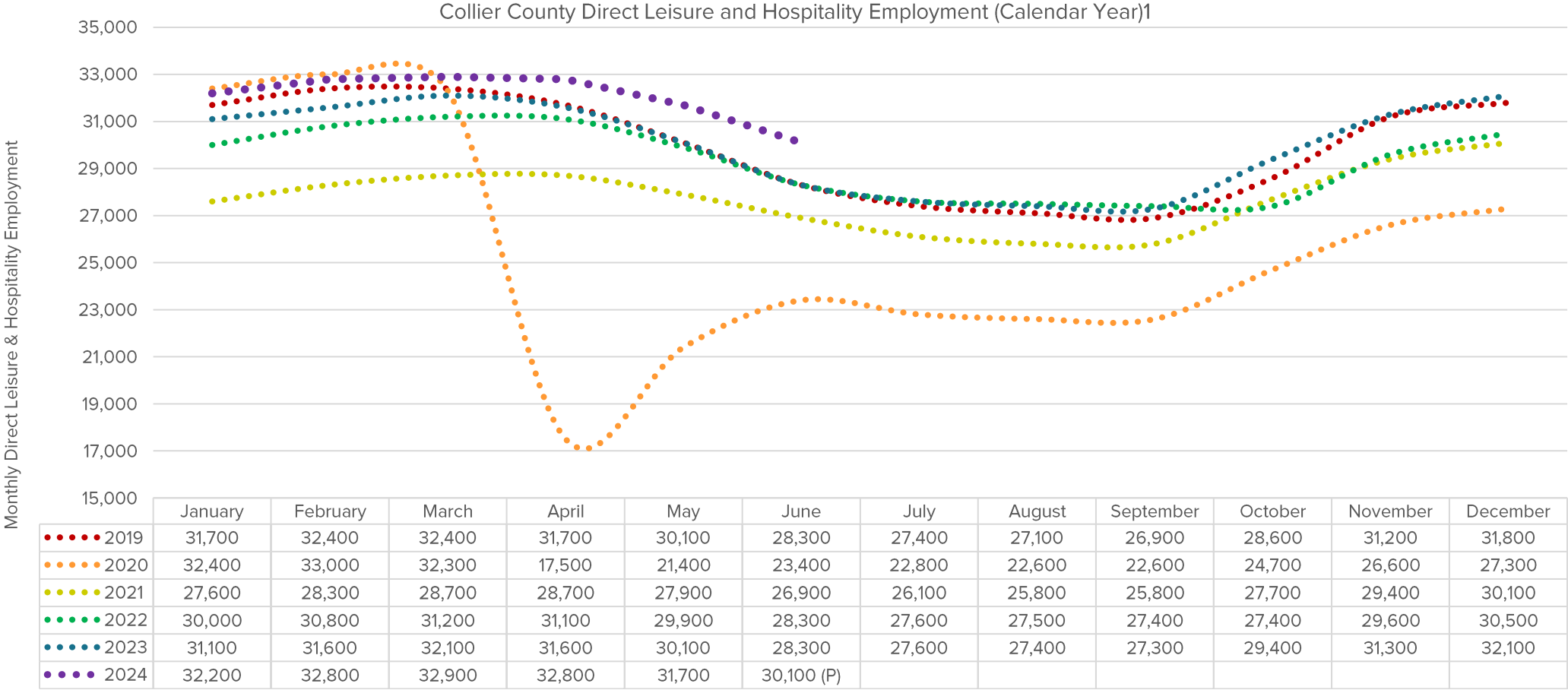
■ July-23 ■ July-24



6

INDUSTRY
DATA

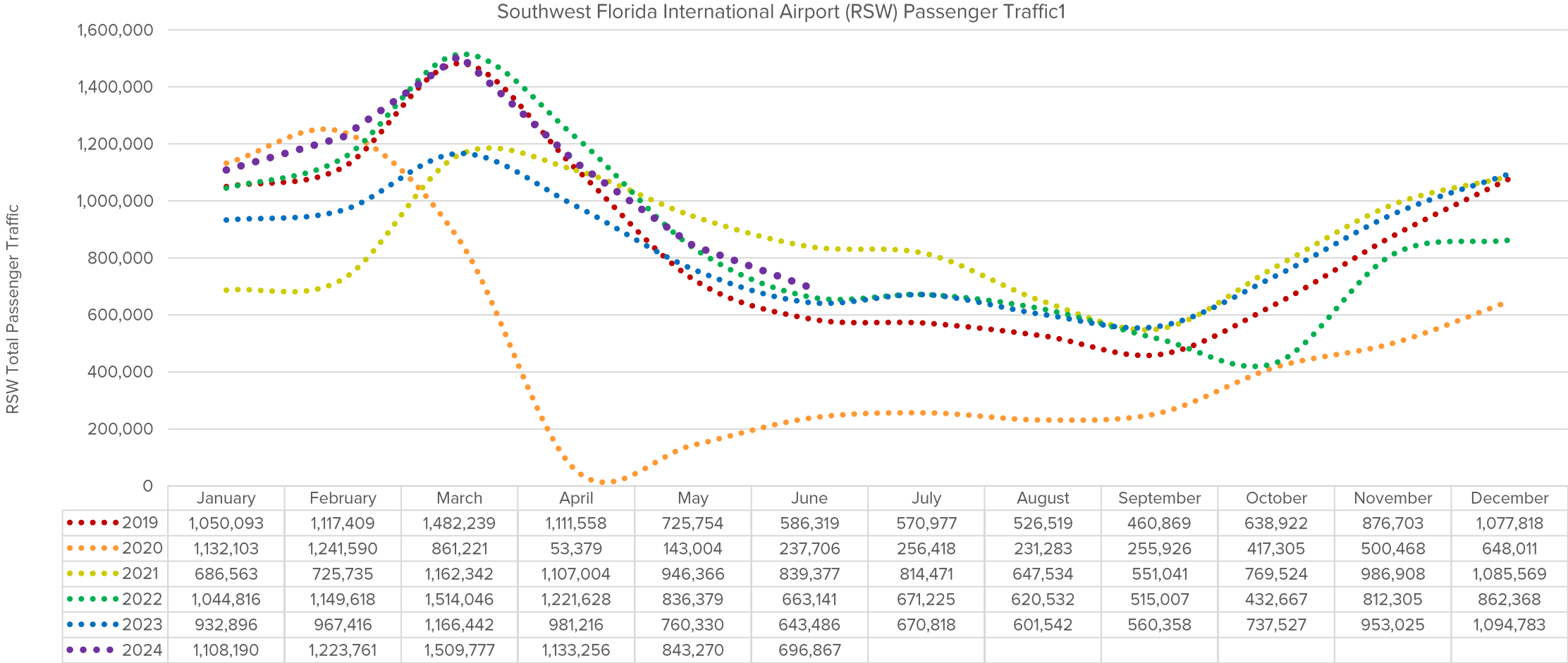
INDUSTRY DATA | CURRENT EMPLOYMENT



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

(P) Preliminary.

INDUSTRY DATA | RSW PASSENGER TRAFFIC



¹SOURCE: Lee County Port Authority Monthly Statistics.

INDUSTRY DATA | LICENSED RENTAL UNITS

July 2024 Licensed Transient Rental Units				
	Hotel	Motel	Vacation Rental	Total
Naples	4,731	1,270	3,108	9,109
Marco Island	1,275	121	2,081	3,477
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	6,044	1,665	5,330	13,039²

¹SOURCE: Florida Department of Business & Professional Regulation.

Questions?

Contact Info:

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James Brendle, Project Director
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A full-page background image showing a man and a woman paddleboarding on the ocean at sunset. The sky is filled with large, dramatic clouds illuminated by the low sun, creating a warm orange and yellow glow. The couple is silhouetted against the bright horizon. The woman is on the left, and the man is on the right, both holding paddles. A light blue rectangular box with a thin border is centered in the upper half of the image, containing the text 'THANK YOU' in a dark blue, sans-serif font.

THANK YOU