

Collier County Tourism Research

June 2020

Presented to:

**The Collier County Tourist
Development Council**

Presented by:

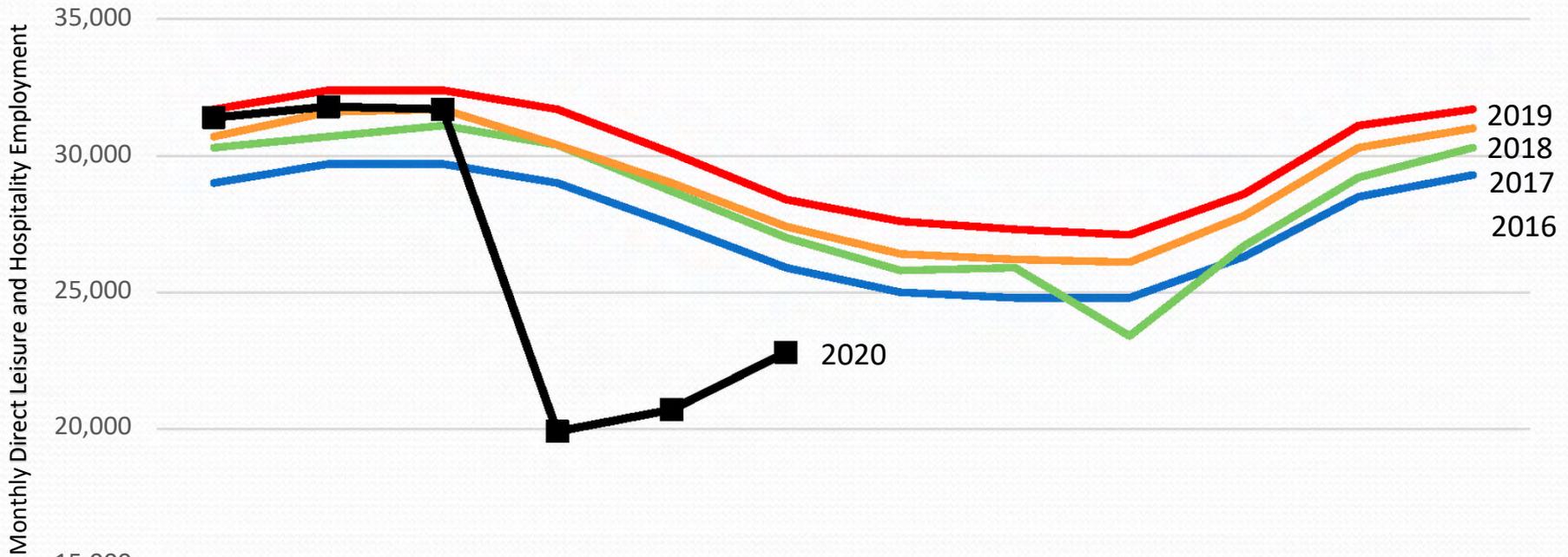
Research Data Services, Inc.

July 2020

Economic Indicators

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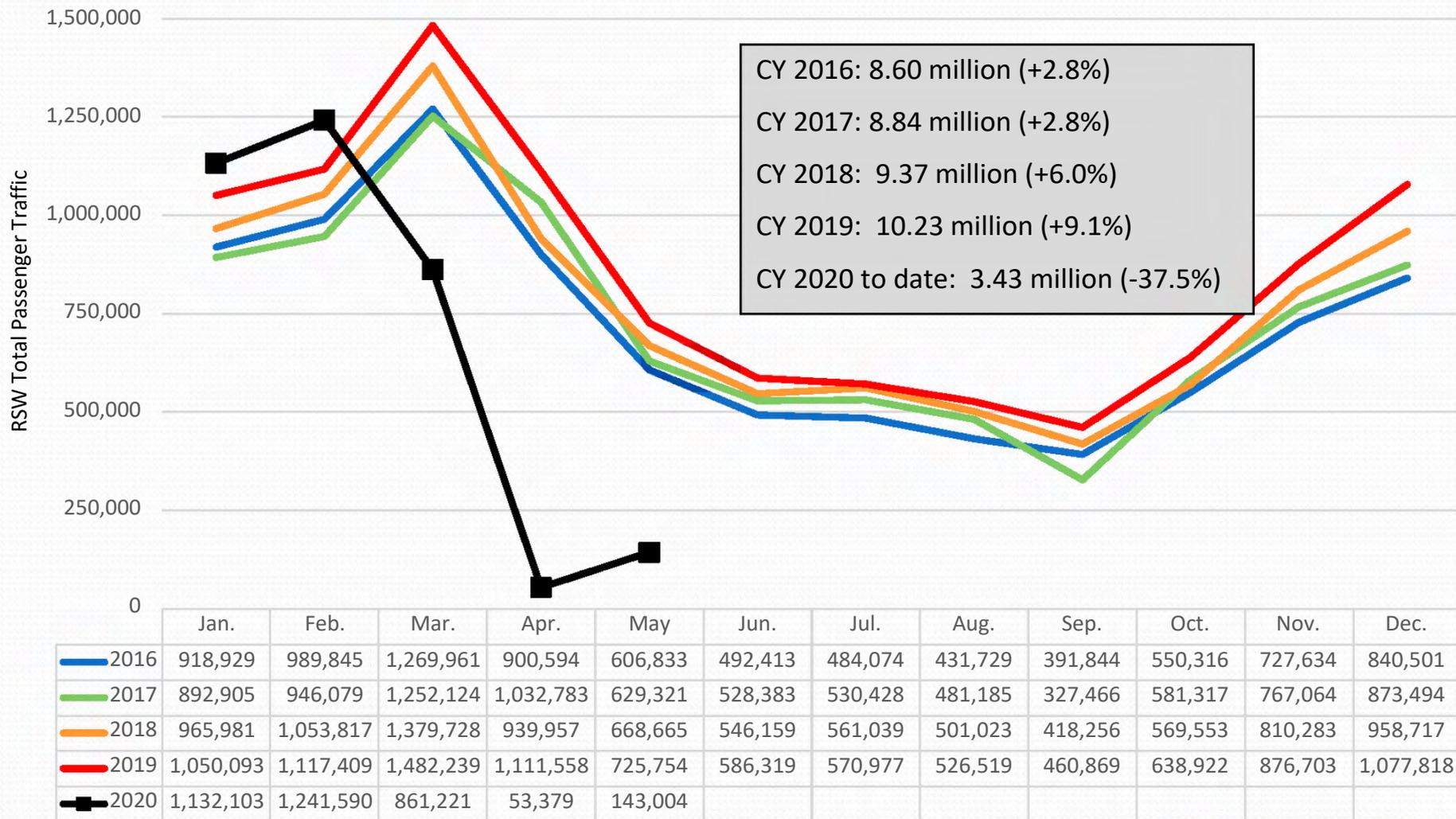
Collier Direct Leisure and Hospitality Employment (Calendar Year)*



	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
2016	29,000	29,700	29,700	29,000	27,500	25,900	25,000	24,800	24,800	26,300	28,500	29,300
2017	30,300	30,700	31,100	30,400	28,700	27,000	25,800	25,900	23,400	26,700	29,200	30,300
2018	30,700	31,600	31,700	30,400	29,000	27,400	26,400	26,200	26,100	27,800	30,300	31,000
2019	31,700	32,400	32,400	31,700	30,100	28,400	27,600	27,300	27,100	28,600	31,100	31,700
2020	31,400	31,800	31,700	19,900	20,700	22,800						

* SOURCE: Florida Department of Economic Opportunity, Labor Market Information, Current Employment Statistic Program (CES), Collier County Leisure and Hospitality Sector. (April 2018 through December 2019 employment projections revised as of March 16, 2020 reporting.)

Southwest Florida International Airport (RSW) Passenger Traffic



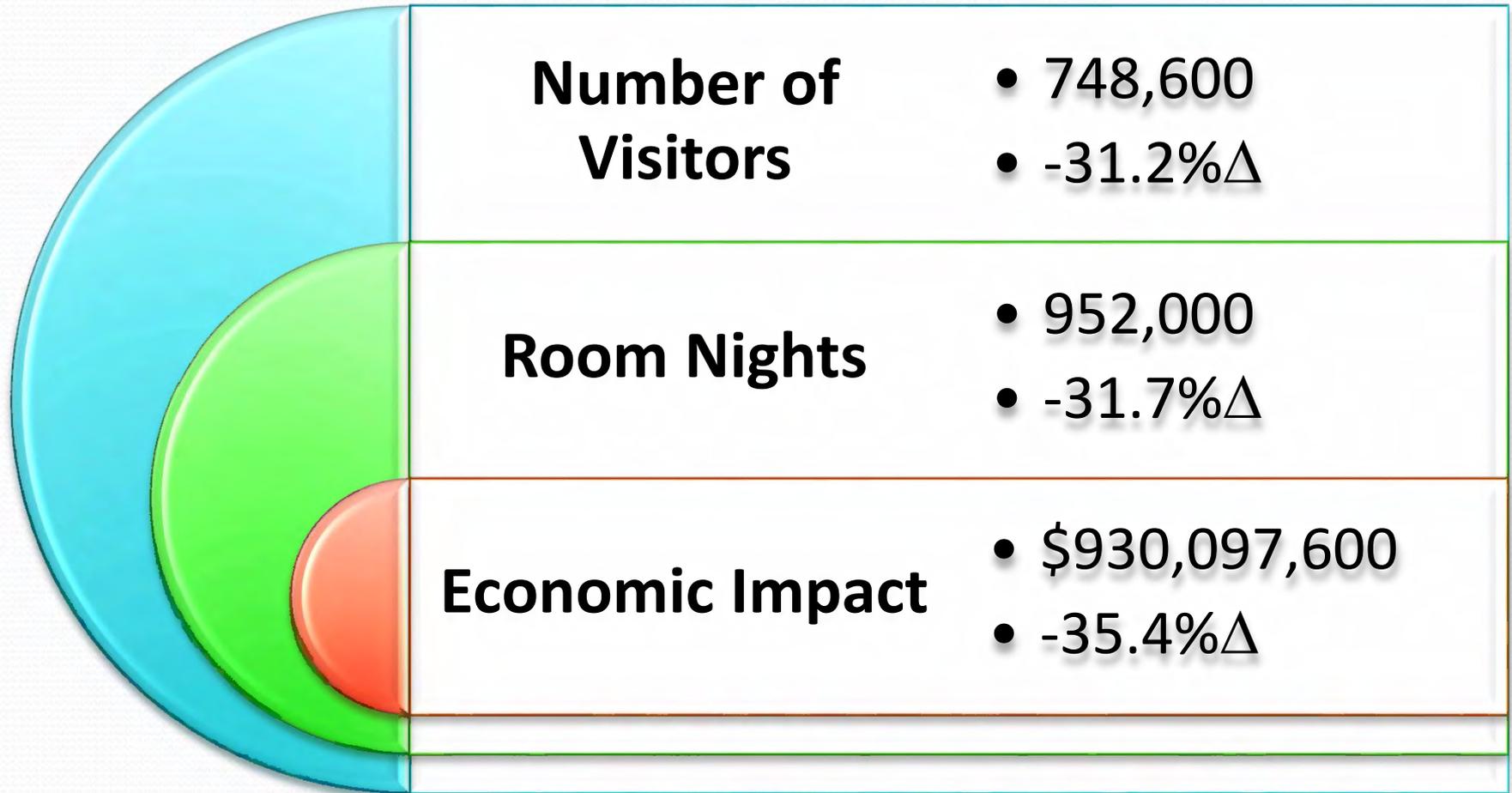
Year to Date 2020

January – June

Collier Visitor Profile

Collier Tourism Metrics

Year to Date 2020 (January – June)



Collier Comp Set

YTD 2020 (January – June)

	Occupancy		ADR		RevPAR	
	2020	% Δ	2020	% Δ	2020	% Δ
Naples MSA	47.0%	-33.5	\$276.11	-1.7	\$129.87	-34.7
Naples Upscale	50.8%	-35.6	\$360.47	-0.2	\$182.94	-35.7
Miami-Hialeah	54.5%	-31.5	\$231.44	+6.4	\$126.19	-27.1
Florida Keys	59.5%	-28.2	\$322.68	+6.5	\$192.09	-23.6
Ft. Myers	52.1%	-31.6	\$181.86	-0.1	\$94.77	-31.7
Sarasota-Bradenton	52.2%	-27.9	\$151.60	-3.2	\$79.20	-30.2
Clearwater	56.3%	-29.3	\$152.67	-11.6	\$85.97	-37.5
St. Petersburg	54.3%	-30.6	\$156.82	-9.7	\$85.15	-37.3
Palm Beach County	50.0%	-35.0	\$219.79	+2.1	\$109.83	-33.6
Ft. Lauderdale	53.0%	-33.2	\$162.61	-1.1	\$86.26	-34.0
Florida	51.8%	-32.4	\$150.87	-4.3	\$78.13	-35.4

Collier Comp Set – Occupancy (%)

YTD 2020 (January – June)

	Trans	% Δ 19-20	Grp	% Δ 19-20	Total
Naples MSA	31.9%	-25.4	15.0%	-46.0	47.0%
Miami-Hialeah	36.6%	-36.3	13.1%	-26.5	54.5%
Florida Keys	51.0%	-28.0	8.1%	-30.3	59.5%
Ft. Myers	39.0%	-33.4	10.0%	-37.1	52.1%
Sarasota-Bradenton	42.5%	-24.0	8.8%	-42.9	52.2%
Clearwater	44.3%	-24.0	11.9%	-43.6	56.3%
St. Petersburg	43.1%	-23.3	10.2%	-51.2	54.3%
Palm Beach County	34.8%	-33.8	14.2%	-37.2	50.0%
Ft. Lauderdale	39.3%	-32.1	10.6%	-38.9	53.0%

Collier Comp Set – ADR (\$)

YTD 2020 (January – June)

	Trans	% Δ 19-20	Grp	% Δ 19-20	Total
Naples MSA	\$276.35	-7.7	\$276.17	+9.1	\$276.11
Miami-Hialeah	\$233.25	+5.2	\$275.57	+19.9	\$231.44
Florida Keys	\$326.15	+6.5	\$307.95	+6.7	\$322.68
Ft. Myers	\$188.44	-2.1	\$178.74	+15.6	\$181.86
Sarasota-Bradenton	\$155.46	-4.8	\$142.17	+2.4	\$151.60
Clearwater	\$153.17	-15.8	\$150.83	+2.6	\$152.67
St. Petersburg	\$157.87	-13.7	\$156.10	+3.0	\$156.82
Palm Beach County	\$214.32	-3.2	\$240.56	+14.9	\$219.79
Ft. Lauderdale	\$158.23	-2.3	\$192.14	+3.9	\$162.61

SOURCE: SMITH TRAVEL RESEARCH, INC.

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June 2020

Collier Visitor Profile

Visitation/Economic Impacts of Tourism

Collier June 2020

June

Visitors

2020

115,600

%Δ

-22.5

2019

149,200

Room Nights

2020

130,700

%Δ

-30.4

2019

187,900

Economic Impact

2020

\$120,384,500

%Δ

-25.3

2019

\$161,210,300

Occupancy/Room Rates

Collier June 2020

	2019	2020	% Δ
Occupancy	65.1%	41.0%	-37.0
ADR	\$199.00	\$219.96	+10.5
RevPAR	\$129.50	\$91.18	-29.6

Licensed Transient Lodging Units

Collier June 2020

Licensed Transient Lodging Units	2019	2020	Δ%
Hotel	5,497	6,247	+13.6
Motel	2,019	2,013	-0.3
Apartment/Vacation Rental	2,508	2,814	+12.2
Total Licensed Lodging Units	10,024	11,074	+10.5

* Source: Florida Department of Business and Professional Regulation (DBPR)

RDS Occupancy/ADR

Collier June 2020

June 2020

	Midweek	Weekend
Occupancy	32.8%	52.4%
ADR	\$204.56	\$241.29

** Please note that 62.5% of properties responding provided usable midweek/weekend breakout data this month.*

Visitor Metrics

Collier June 2020

- Collier's June visitation originates from the following primary market segments:

June Visitation	2020 Visitor #	Δ%
Florida	93,636	+28.1
Southeast	4,740	-57.6
Northeast	7,745	-52.8
Midwest	5,318	-70.0
Canada*	0	-100.0
Europe*	0	-100.0
Other	4,161	-59.0
Total	115,600	-22.5

* June 2020's Canadian and European visitation was too small to measure.

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Collier Comp Set

June 2020

	Occupancy		ADR		RevPAR	
	2020	% Δ	2020	% Δ	2020	% Δ
Naples MSA	37.3%	-34.3	\$180.46	+2.7	\$67.33	-32.5
Naples Upscale	41.2%	-37.9	\$242.47	+7.3	\$99.93	-33.3
Miami-Hialeah	31.4%	-56.9	\$115.42	-23.9	\$36.24	-67.2
Florida Keys	53.9%	-34.3	\$254.60	+7.6	\$137.14	-29.3
Ft. Myers	42.7%	-34.9	\$134.97	+2.5	\$57.69	-33.3
Sarasota-Bradenton	50.4%	-23.7	\$116.79	-2.6	\$58.83	-25.7
Clearwater	56.7%	-27.2	\$140.98	-7.7	\$79.98	-32.8
St. Petersburg	52.6%	-30.6	\$139.53	-7.9	\$73.43	-36.1
Palm Beach County	38.0%	-42.8	\$138.85	+6.8	\$52.77	-38.9
Ft. Lauderdale	40.2%	-44.8	\$93.82	-21.1	\$37.68	-56.5
Florida	41.6%	-43.4	\$116.68	-11.9	\$48.56	-50.2

Collier Comp Set – Occupancy (%)

June 2020

	Trans	% Δ 19-20	Grp	% Δ 19-20	Total
Naples MSA	35.9%	-1.7	1.4%	-93.0	37.3%
Miami-Hialeah	25.9%	-53.3	2.1%	-84.7	31.4%
Florida Keys	52.2%	-24.8	1.5%	-88.0	53.9%
Ft. Myers	40.6%	-19.7	1.5%	-89.2	42.7%
Sarasota-Bradenton	47.7%	-7.5	2.1%	-84.0	50.4%
Clearwater	56.0%	-7.9	0.8%	-95.4	56.7%
St. Petersburg	51.0%	-13.8	1.1%	-93.0	52.6%
Palm Beach County	31.6%	-34.4	6.0%	-64.8	38.0%
Ft. Lauderdale	36.9%	-31.0	2.0%	-87.1	40.2%

SOURCE: SMITH TRAVEL RESEARCH, INC.

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Collier Comp Set – ADR (\$)

June 2020

	Trans	% Δ 19-20	Grp	% Δ 19-20	Total
Naples MSA	\$181.43	-0.9	\$155.81	-4.6	\$180.46
Miami-Hialeah	\$124.06	-19.0	\$74.68	-53.7	\$115.42
Florida Keys	\$255.74	+7.3	\$231.41	+1.1	\$254.60
Ft. Myers	\$137.64	-1.9	\$98.23	-8.3	\$134.97
Sarasota-Bradenton	\$119.19	-3.4	\$78.59	-29.7	\$116.79
Clearwater	\$141.07	-11.5	\$133.93	+3.6	\$140.98
St. Petersburg	\$140.37	-11.8	\$112.64	-10.1	\$139.43
Palm Beach County	\$114.52	-10.6	\$273.89	+94.5	\$138.85
Ft. Lauderdale	\$96.31	-18.5	\$66.20	-49.1	\$93.82

SOURCE: SMITH TRAVEL RESEARCH, INC.

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Party Size/LOS

Collier June 2020

- This June, visitor party size averaged **2.6** travelers who stayed for **2.7 nights** in the Naples, Marco Island, Everglades area (***June 2019: 2.7 people; 3.0 nights***).

Thank you!

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