

# Collier County Tourism Research

## April 2020

Presented to:

**The Collier County Tourist  
Development Council**

Presented by:

**Research Data Services, Inc.**

*May 2020*

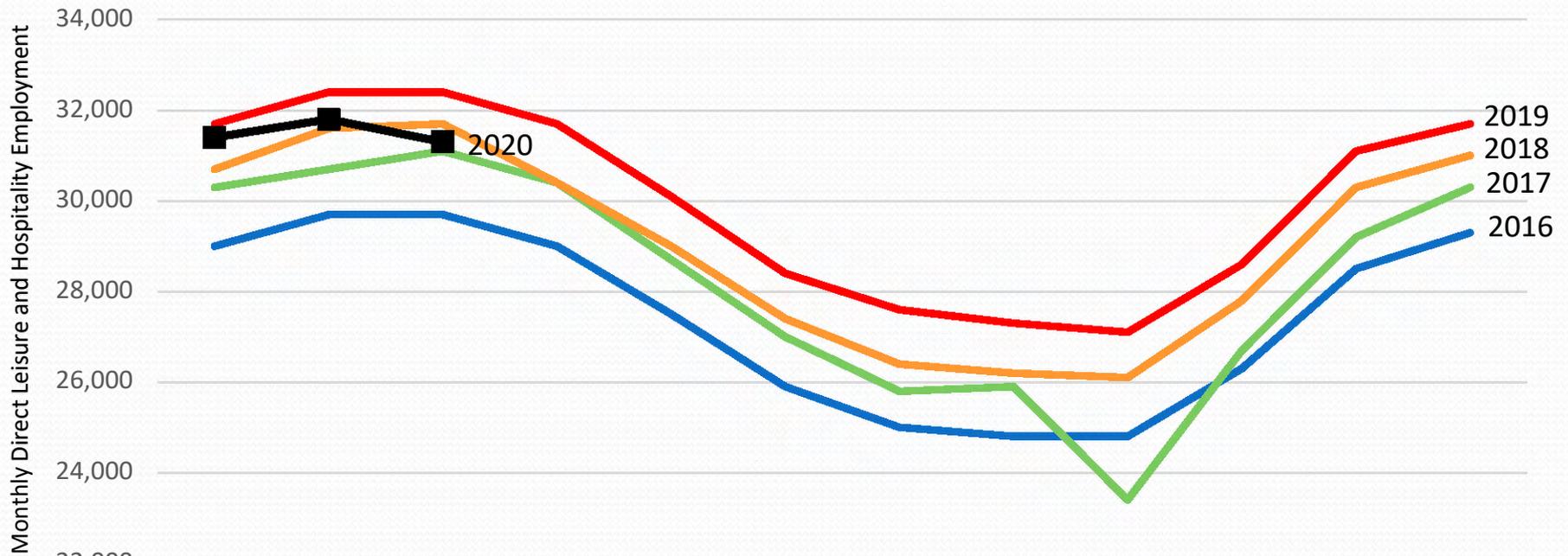
# Forward Reservations

*Collier April 2020 Occupancy Reporting*

- Better than half (61.8%) of Collier properties report receiving some level of forward reservations, including some pickup for May.
- Properties with new May reservations characterize them as very short term (0 – 7 days out) and primarily Floridians.

# Economic Indicators

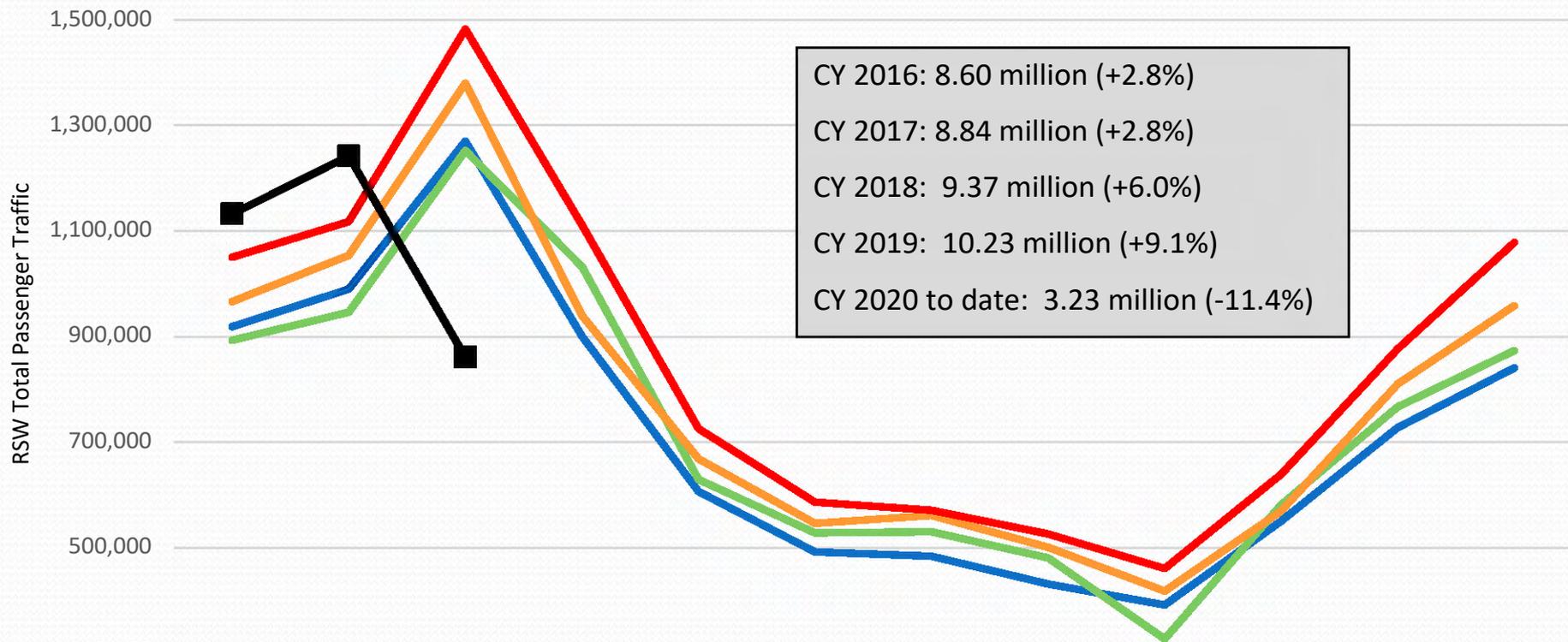
# Collier Direct Leisure and Hospitality Employment (Calendar Year)\*



	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	31,300									

\* 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



	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
2016	918,929	989,845	1,269,961	900,594	606,833	492,413	484,074	431,729	391,844	550,316	727,634	840,501
2017	892,905	946,079	1,252,124	1,032,783	629,321	528,383	530,428	481,185	327,466	581,317	767,064	873,494
2018	965,981	1,053,817	1,379,728	939,957	668,665	546,159	561,039	501,023	418,256	569,553	810,283	958,717
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									

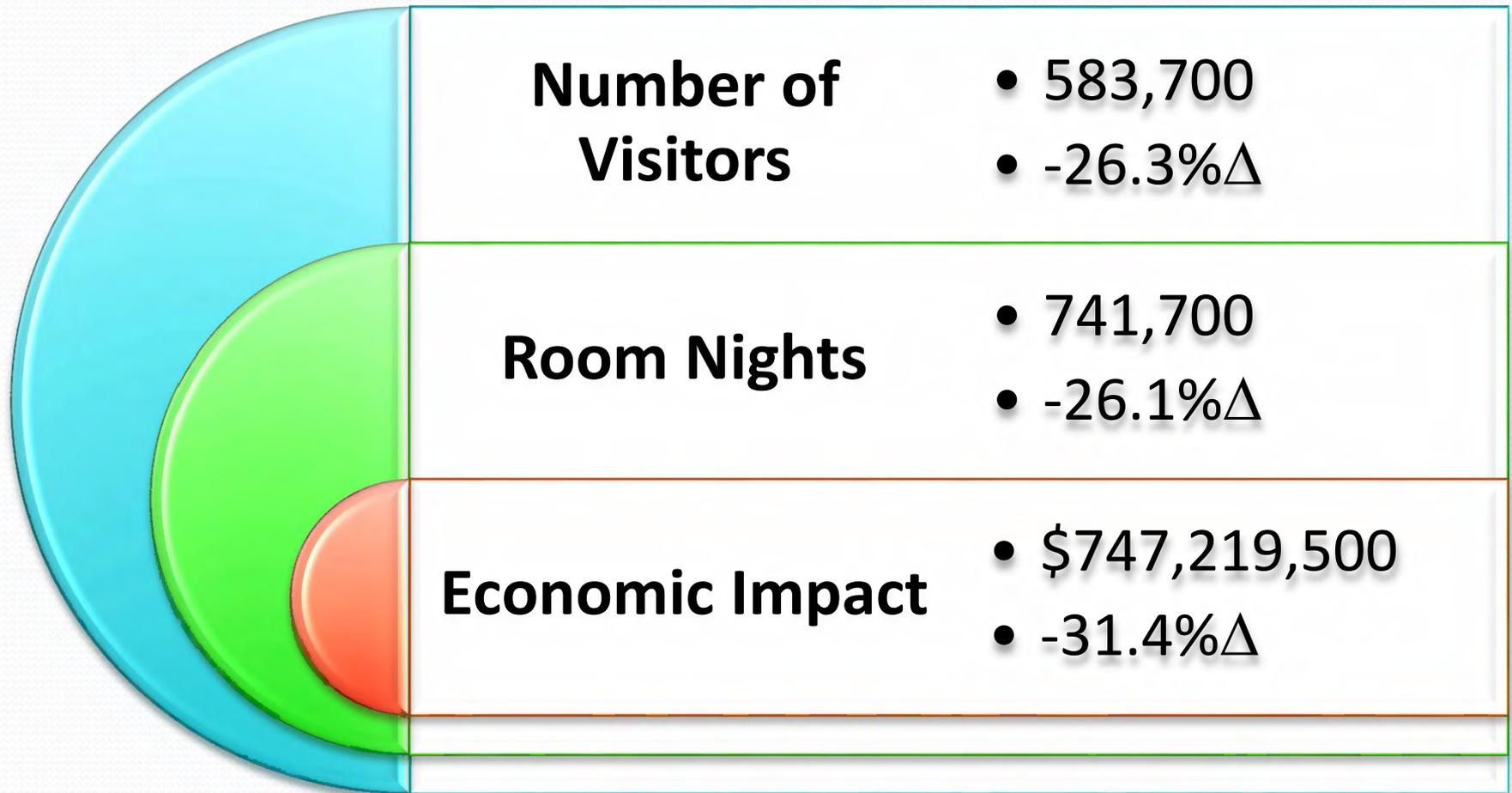
# Year to Date 2020

January – April

Collier Visitor Profile

# Collier Tourism Metrics

Year to Date 2020 (January – April)



# Collier Comp Set

YTD 2020 (January – April)

	Occupancy		ADR		RevPAR	
	2020	% Δ	2020	% Δ	2020	% Δ
<b>Naples MSA</b>	54.9%	-27.7	\$307.61	-3.3	\$168.98	-30.0
<b>Naples Upscale</b>	58.8%	-29.3	\$399.20	-2.6	\$234.85	-31.1
<b>Miami-Hialeah</b>	63.5%	-22.7	\$254.17	+5.2	\$161.40	-18.8
<b>Florida Keys</b>	67.3%	-20.5	\$340.19	+3.0	\$228.89	-18.0
<b>Ft. Myers</b>	60.5%	-25.5	\$199.23	-1.3	\$120.61	-26.4
<b>Sarasota-Bradenton</b>	57.0%	-25.1	\$166.26	-2.9	\$94.79	-27.2
<b>Clearwater</b>	59.3%	-26.7	\$161.65	-11.4	\$95.84	-35.0
<b>St. Petersburg</b>	58.2%	-27.1	\$166.48	-7.5	\$96.85	-32.6
<b>Palm Beach County</b>	59.9%	-26.4	\$243.59	-0.9	\$145.82	-27.1
<b>Ft. Lauderdale</b>	61.3%	-25.5	\$184.44	+1.5	\$113.12	-24.5

# Collier Comp Set – Occupancy (%)

YTD 2020 (January – April)

	Trans	% Δ 19-20	Grp	% Δ 19-20	Total
Naples MSA	32.1%	-29.8	22.7%	-24.7	54.9%
Miami-Hialeah	42.0%	-28.2	16.8%	-13.2	63.5%
Florida Keys	56.4%	-22.1	10.5%	-10.7	67.3%
Ft. Myers	41.7%	-33.4	14.5%	-12.3	60.5%
Sarasota-Bradenton	43.4%	-26.0	12.5%	-24.0	57.0%
Clearwater	41.6%	-28.8	17.7%	-21.4	59.3%
St. Petersburg	43.3%	-24.2	13.5%	-36.8	58.2%
Palm Beach County	39.9%	-27.5	18.8%	-23.4	59.9%
Ft. Lauderdale	43.1%	-27.7	14.1%	-22.2	61.3%

# Collier Comp Set – ADR (\$)

YTD 2020 (January – April)

	Trans	% Δ 19-20	Grp	% Δ 19-20	Total
Naples MSA	\$331.05	-4.1	\$275.36	-0.7	\$307.61
Miami-Hialeah	\$257.12	+3.3	\$288.90	+15.8	\$254.17
Florida Keys	\$345.36	+3.3	\$318.79	+2.7	\$340.19
Ft. Myers	\$214.06	+0.2	\$181.82	+6.7	\$199.23
Sarasota-Bradenton	\$174.64	-2.9	\$146.17	-0.1	\$166.26
Clearwater	\$166.18	-14.2	\$151.02	-1.5	\$161.65
St. Petersburg	\$167.21	-10.0	\$168.71	+0.3	\$166.48
Palm Beach County	\$250.90	-2.8	\$236.05	+3.3	\$243.59
Ft. Lauderdale	\$182.65	+2.0	\$206.00	+0.9	\$184.44

SOURCE: SMITH TRAVEL RESEARCH, INC.

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# April 2020

## Collier Visitor Profile

# Visitation/Economic Impacts of Tourism

Collier April 2020

## April

### Visitors

2020

**11,500**

%Δ

**-92.2**

2019

**147,100**

### Room Nights

2020

**27,100**

%Δ

**-87.8**

2019

**221,700**

### Economic Impact

2020

**\$13,782,700**

%Δ

**-94.1**

2019

**\$234,567,100**

\* Based on market inventory including the nearly 40% of properties that were temporarily closed or reported no occupancy for April due to COVID-19 travel restrictions.

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# Occupancy/Room Rates

Collier April 2020

	2019	2020*	% Δ
<b>Occupancy</b>	81.2%	8.2%	-89.9
<b>ADR</b>	\$321.00	\$173.98	-45.8
<b>RevPAR</b>	\$260.70	\$14.27	-94.5

\* Based on market inventory including the nearly 40% of properties that were temporarily closed or reported no occupancy for April due to COVID-19 travel restrictions.

# Visitor Metrics

Collier April 2020

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

April Visitation	2020 Visitor #	Δ%
Florida	5,980	-85.1
Southeast	437	-95.4
Northeast	2,611	-92.5
Midwest	2,116	-92.3
Canada*	0	-100.0
Europe*	0	-100.0
Other	356	-95.3
<b>Total</b>	<b>11,500</b>	<b>-92.2</b>

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

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# Collier Comp Set

April 2020

	Occupancy		ADR		RevPAR	
	2020	% Δ	2020	% Δ	2020	% Δ
Naples MSA	11.1%	-84.1	\$114.06	-60.8	\$12.72	-93.8
Naples Upscale	6.8%	-91.7	\$163.09	-57.7	\$11.03	-96.5
Miami-Hialeah	23.9%	-70.5	\$90.83	-58.7	\$21.69	-87.8
Florida Keys	7.0%	-91.6	\$143.16	-54.6	\$9.99	-96.2
Ft. Myers	18.1%	-75.9	\$77.35	-57.3	\$14.04	-89.7
Sarasota-Bradenton	17.4%	-75.4	\$85.64	-45.8	\$14.86	-86.7
Clearwater	21.4%	-73.5	\$66.53	-64.5	\$14.21	-90.6
St. Petersburg	19.5%	-75.2	\$79.23	-57.1	\$15.48	-89.4
Palm Beach County	20.1%	-73.8	\$135.24	-37.1	\$27.14	-83.6
Ft. Lauderdale	23.1%	-70.8	\$86.64	-47.8	\$20.06	-84.8

# Collier Comp Set – Occupancy (%)

April 2020

	Trans	% Δ 19-20	Grp	% Δ 19-20	Total
Naples MSA	11.1%	-76.2	0.1%	-99.8	11.1%
Miami-Hialeah	9.2%	-84.3	6.7%	-63.4	23.9%
Florida Keys	3.4%	-95.3	3.3%	-66.6	7.0%
Ft. Myers	15.1%	-73.6	0.5%	-97.1	18.1%
Sarasota-Bradenton	15.6%	-71.6	0.7%	-95.1	17.4%
Clearwater	21.4%	-67.2	0.0%	-100.0	21.4%
St. Petersburg	16.4%	-72.4	1.5%	-92.1	19.5%
Palm Beach County	10.9%	-78.2	8.5%	-66.0	20.1%
Ft. Lauderdale	12.3%	-78.8	7.4%	-56.7	23.1%

SOURCE: SMITH TRAVEL RESEARCH, INC.

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# Collier Comp Set – ADR (\$)

April 2020

	Trans	% Δ 19-20	Grp	% Δ 19-20	Total
Naples MSA	\$114.40	-63.4	\$40.90	-83.4	\$114.06
Miami-Hialeah	\$100.60	-54.9	\$82.23	-65.1	\$90.83
Florida Keys	\$132.99	-58.1	\$155.01	-49.8	\$143.16
Ft. Myers	\$74.20	-62.0	\$77.82	-45.4	\$77.35
Sarasota-Bradenton	\$88.68	-47.0	\$69.52	-46.7	\$85.64
Clearwater	\$66.53	-66.0	\$0.00	-100.0	\$66.53
St. Petersburg	\$74.89	-60.9	\$83.51	-49.4	\$79.23
Palm Beach County	\$75.78	-66.1	\$215.37	+4.7	\$135.24
Ft. Lauderdale	\$80.23	-51.5	\$80.64	-54.9	\$86.64

SOURCE: SMITH TRAVEL RESEARCH, INC.

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# Party Size/LOS

*Collier April 2020*

- This April, visitor party size averaged **2.0** travelers who stayed for **4.2 nights** in the Naples, Marco Island, Everglades area (***April 2019: 2.8 people; 3.5 nights***).

*Thank you!*

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