

# 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*

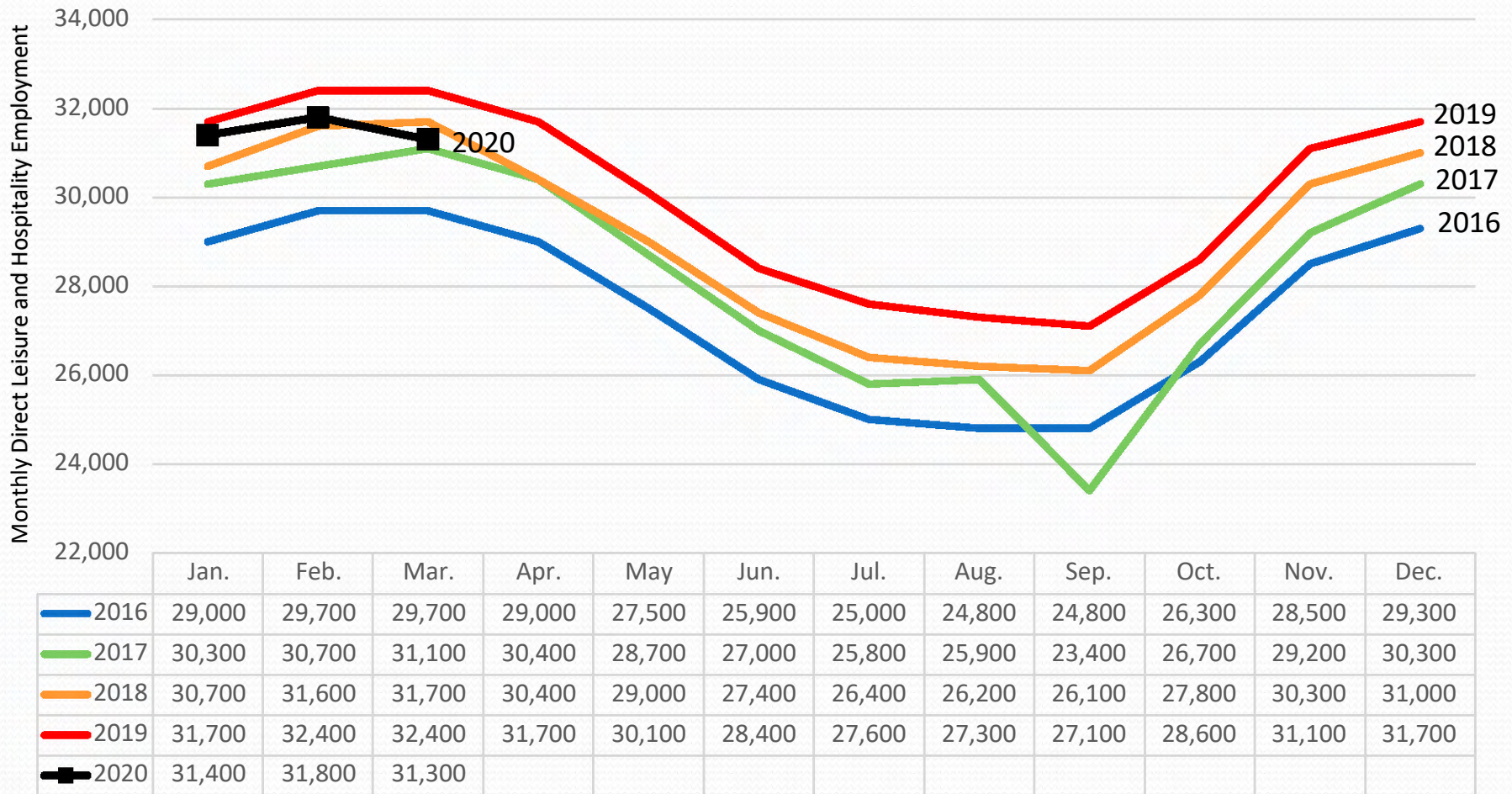
- Better than half (61.8%) of Collier properties report receiving some level of forward reservations, including some pickup for May.
- Properties with new May reservations characterize them as very short term (0 – 7 days out) and primarily Floridians.



# Economic Indicators



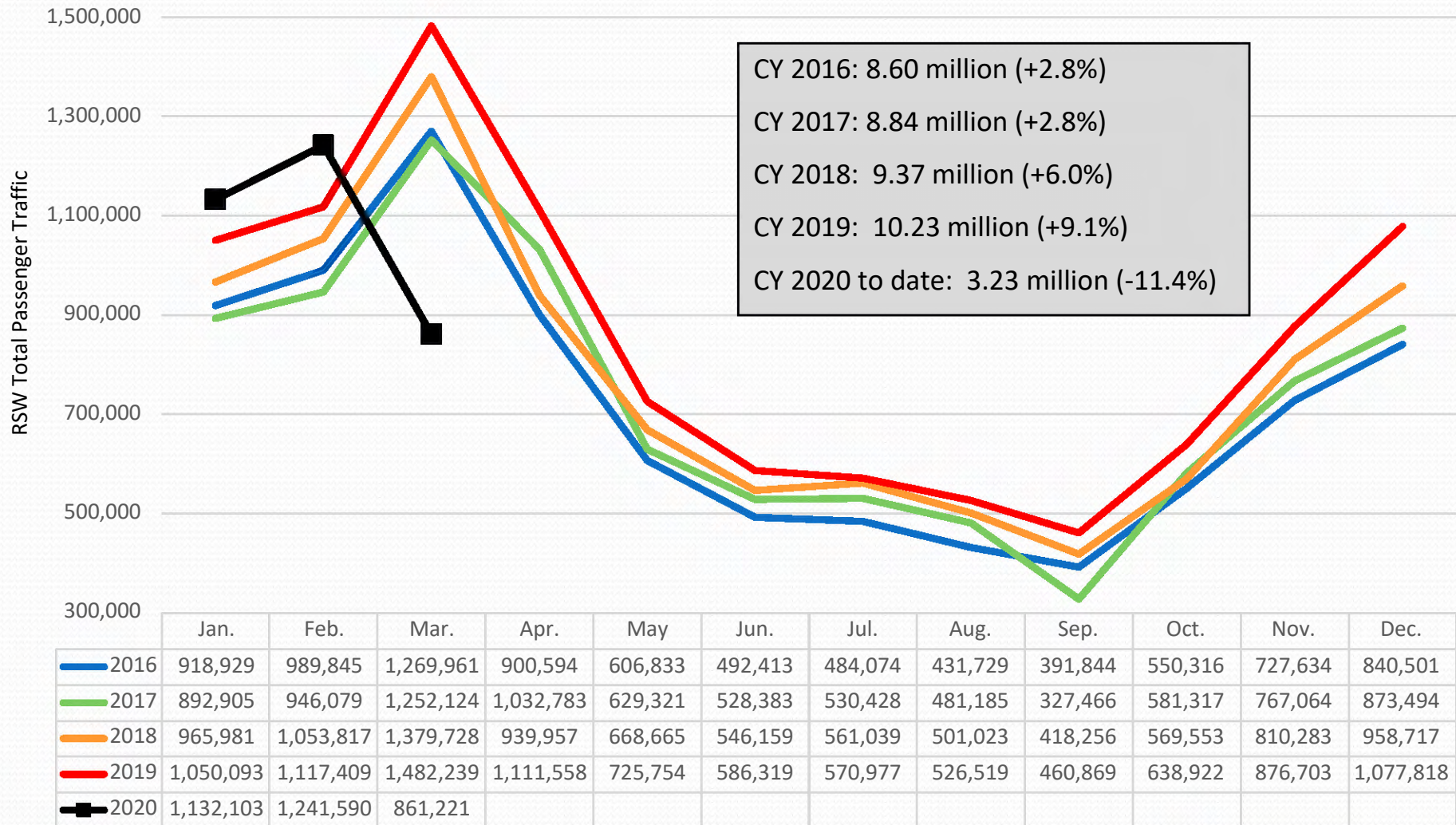
# Collier Direct Leisure and Hospitality Employment (Calendar Year)\*



\* 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

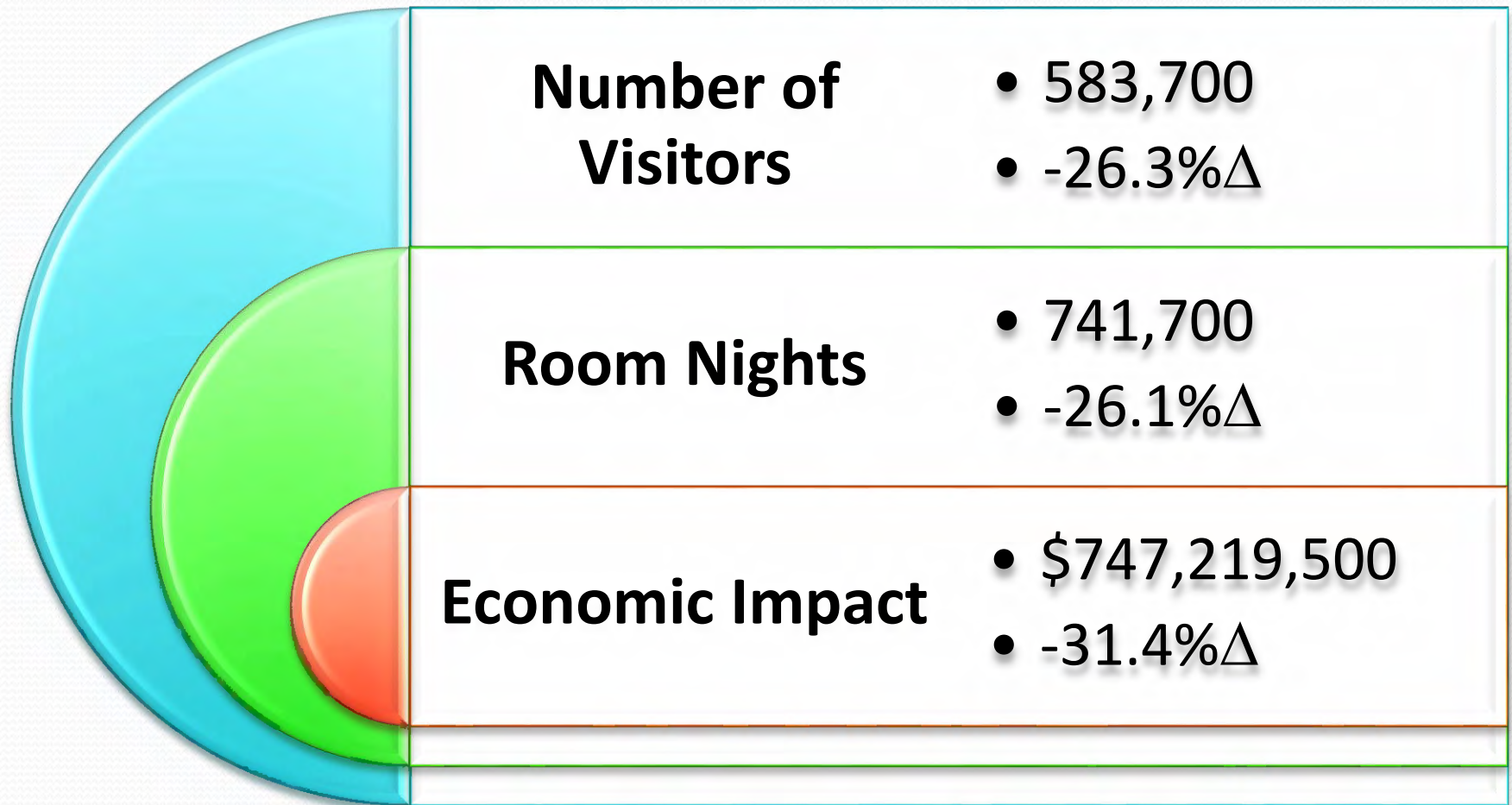
January – April

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

SOURCE: SMITH TRAVEL RESEARCH, INC.

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# 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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**Research Data**  
market research+



# 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.

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# 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!*