

Collier County Tourism Research

July 2020

Presented to:

**The Collier County Tourist
Development Council**

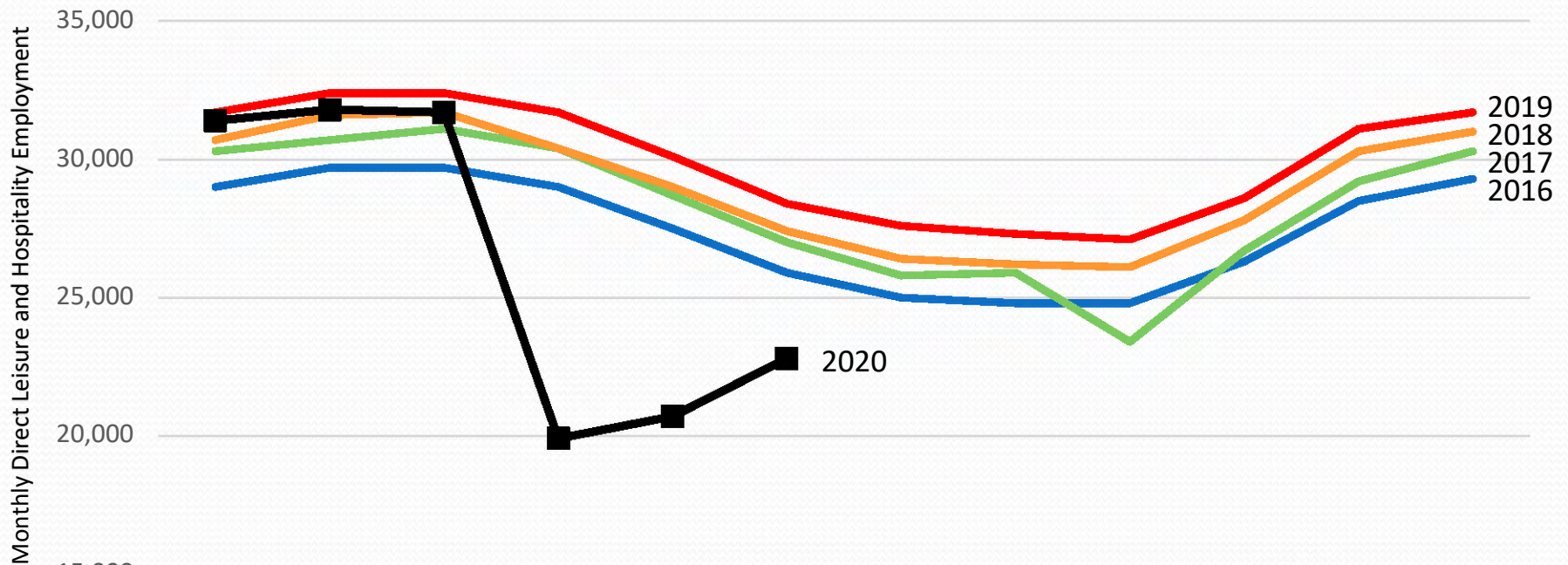
Presented by:

Research Data Services, Inc.

August 2020

Economic Indicators

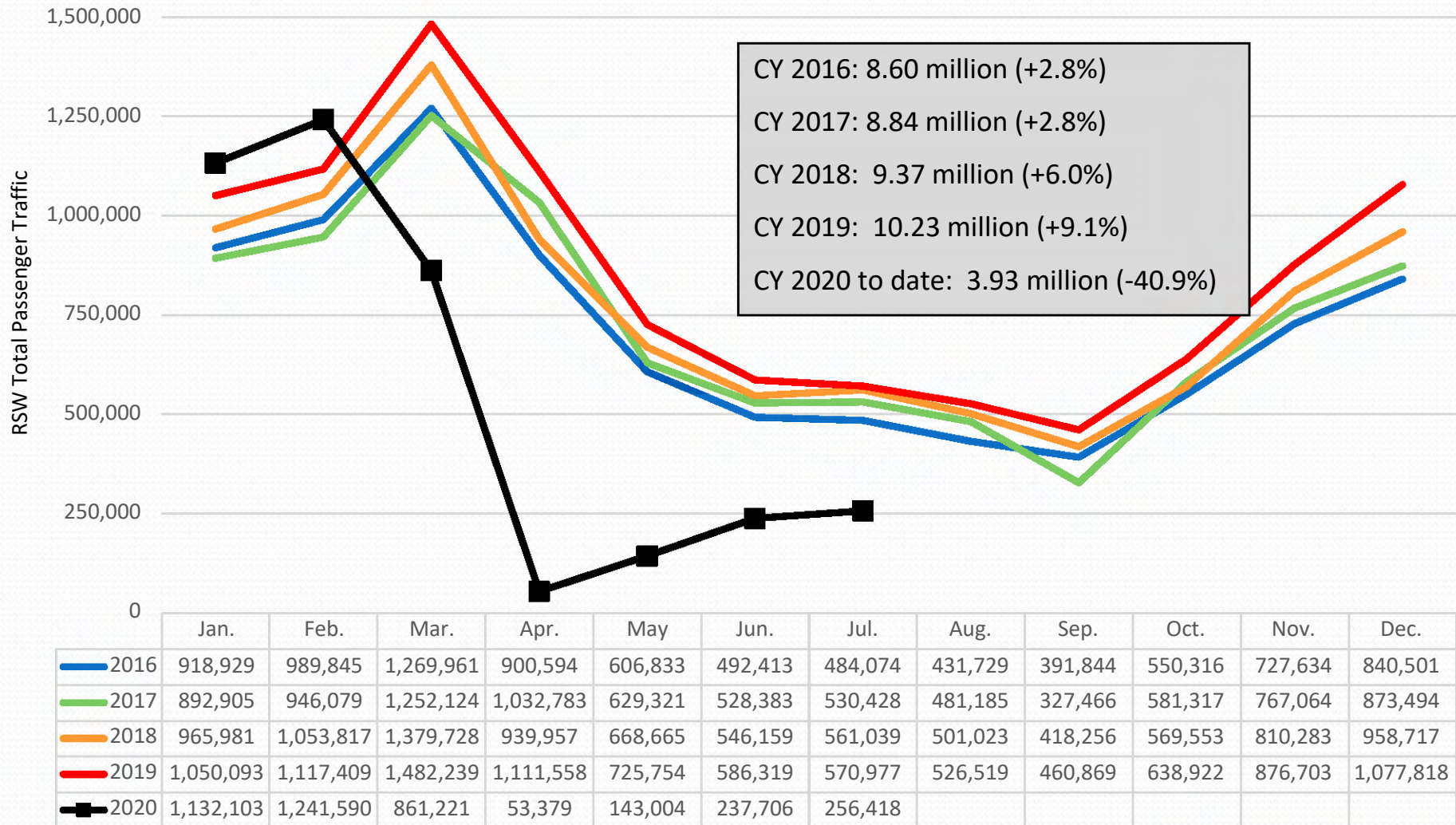
Collier Direct Leisure and Hospitality Employment (Calendar Year)*



	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	31,700	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



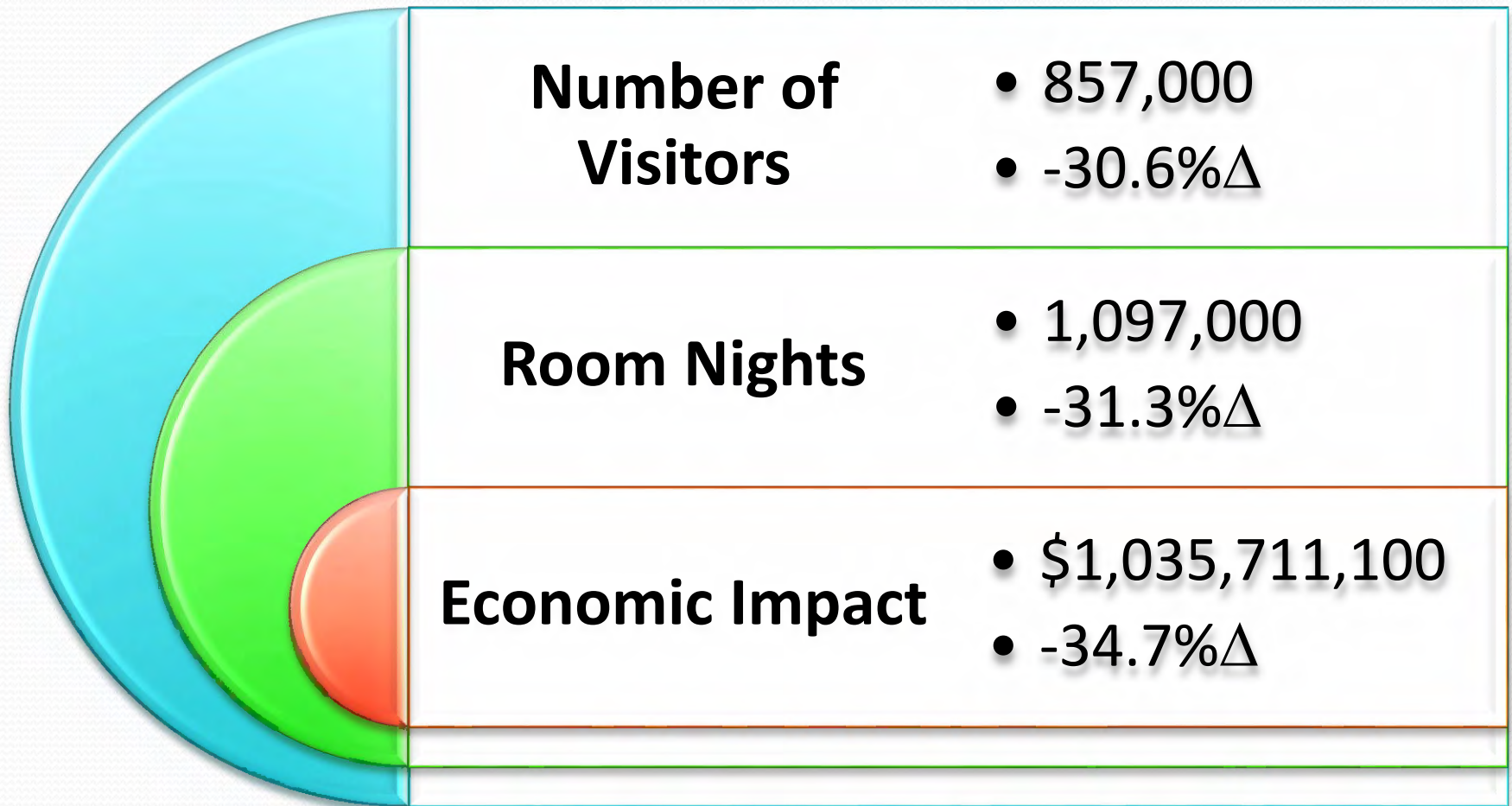
Year to Date 2020

January – July

Collier Visitor Profile

Collier Tourism Metrics

Year to Date 2020 (January – July)



Collier Comp Set

YTD 2020 (January – July)

	Occupancy		ADR		RevPAR	
	2020	% Δ	2020	% Δ	2020	% Δ
Naples MSA	46.2%	-33.3	\$265.28	-1.1	\$122.58	-34.0
Naples Upscale	50.1%	-35.4	\$346.68	+0.6	\$173.76	-35.0
Miami-Hialeah	51.0%	-35.4	\$220.24	+5.4	\$112.33	-31.9
Florida Keys	59.4%	-28.4	\$313.98	+6.7	\$186.50	-23.6
Ft. Myers	51.7%	-30.8	\$175.95	-0.1	\$90.88	-30.9
Sarasota-Bradenton	52.2%	-26.8	\$147.26	-3.0	\$76.94	-29.0
Clearwater	56.1%	-29.2	\$150.74	-11.7	\$84.64	-37.5
St. Petersburg	53.9%	-30.9	\$155.30	-9.2	\$83.70	-37.3
Palm Beach County	47.9%	-36.6	\$209.78	+2.8	\$100.59	-34.9
Ft. Lauderdale	52.1%	-33.9	\$154.30	-2.4	\$80.38	-35.5

Collier Comp Set – Occupancy (%)

YTD 2020 (January – July)

	Trans	% Δ 19-20	Grp	% Δ 19-20	Total
Naples MSA	32.9%	-22.8	13.2%	-50.2	46.2%
Miami-Hialeah	34.6%	-40.3	11.8%	-29.8	51.0%
Florida Keys	52.0%	-27.5	7.1%	-34.8	59.4%
Ft. Myers	39.7%	-31.6	9.1%	-39.2	51.7%
Sarasota-Bradenton	43.0%	-22.5	8.4%	-43.1	52.2%
Clearwater	45.5%	-23.9	10.7%	-45.1	56.1%
St. Petersburg	43.9%	-23.6	9.1%	-53.3	53.9%
Palm Beach County	33.9%	-35.6	13.2%	-38.6	47.9%
Ft. Lauderdale	39.4%	-31.7	9.6%	-42.6	52.1%

SOURCE: SMITH TRAVEL RESEARCH, INC.

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Collier Comp Set – ADR (\$)

YTD 2020 (January – July)

	Trans	% Δ 19-20	Grp	% Δ 19-20	Total
Naples MSA	\$263.08	-7.5	\$271.26	+11.9	\$265.28
Miami-Hialeah	\$221.88	+4.3	\$264.98	+19.3	\$220.24
Florida Keys	\$316.02	+6.6	\$306.14	+7.9	\$313.98
Ft. Myers	\$181.76	-2.0	\$172.85	+15.2	\$175.95
Sarasota-Bradenton	\$151.40	-4.2	\$134.84	-0.1	\$147.26
Clearwater	\$151.45	-15.3	\$147.75	+1.3	\$150.74
St. Petersburg	\$156.57	-12.7	\$153.26	+2.3	\$155.30
Palm Beach County	\$201.03	-3.7	\$239.21	+19.1	\$209.78
Ft. Lauderdale	\$149.92	-3.9	\$185.07	+4.3	\$154.30

SOURCE: SMITH TRAVEL RESEARCH, INC.

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July 2020

Collier Visitor Profile

Visitation/Economic Impacts of Tourism

Collier July 2020

July

Visitors

2020
108,400

%Δ
-25.8

2019
146,000

Room Nights

2020
145,000

%Δ
-28.0

2019
201,400

Economic Impact

2020
\$105,613,500

%Δ
-28.6

2019
\$147,839,200

Occupancy/Room Rates

Collier July 2020

	2019	2020	% Δ
Occupancy	73.4%	47.7%	-35.0
ADR	\$174.20	\$196.81	+13.0
RevPAR	\$127.90	\$93.88	-26.6

Licensed Transient Lodging Units

Collier July 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	2,847	+13.5
Total Licensed Lodging Units	10,024	11,107	+10.8

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

RDS Occupancy/ADR

Collier July 2020

July 2020

	Midweek	Weekend
Occupancy	40.1%	61.2%
ADR	\$180.40	\$213.64

** Please note that 64.9% of properties responding provided usable midweek/weekend breakout data this month.*

Visitor Metrics

Collier July 2020

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

July Visitation	2020 Visitor #	Δ%
Florida	86,503	+16.2
Southeast	5,745	-35.5
Northeast	4,445	-74.2
Midwest	6,287	-43.3
Canada*	0	-100.0
Europe*	0	-100.0
Other	5,420	-40.1
Total	108,400	-25.8

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

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Collier Comp Set

July 2020

	Occupancy		ADR		RevPAR	
	2020	% Δ	2020	% Δ	2020	% Δ
Naples MSA	41.3%	-32.2	\$195.37	+7.6	\$80.65	-27.1
Naples Upscale	46.6%	-34.1	\$261.97	+10.9	\$121.97	-27.0
Miami-Hialeah	30.8%	-59.0	\$107.47	-31.3	\$33.15	-71.8
Florida Keys	57.7%	-30.9	\$270.84	+11.3	\$156.23	-23.1
Ft. Myers	49.6%	-24.4	\$140.78	+4.6	\$69.76	-20.9
Sarasota-Bradenton	52.4%	-19.5	\$122.40	+1.7	\$64.09	-18.1
Clearwater	55.4%	-28.4	\$139.29	-12.6	\$77.10	-37.4
St. Petersburg	51.7%	-32.5	\$146.56	-6.0	\$75.75	-36.6
Palm Beach County	36.5%	-46.7	\$132.35	+0.9	\$48.35	-46.3
Ft. Lauderdale	44.9%	-40.0	\$96.33	-19.0	\$43.27	-51.4

Collier Comp Set – Occupancy (%)

July 2020

	Trans	% Δ 19-20	Grp	% Δ 19-20	Total
Naples MSA	38.4%	-8.0	2.9%	-84.8	41.3%
Miami-Hialeah	22.9%	-62.2	4.2%	-60.5	30.8%
Florida Keys	55.9%	-27.7	1.6%	-72.0	57.7%
Ft. Myers	44.2%	-19.6	3.8%	-58.4	49.6%
Sarasota-Bradenton	45.6%	-13.4	6.3%	-44.3	52.4%
Clearwater	52.0%	-22.9	3.3%	-64.5	55.4%
St. Petersburg	47.9%	-25.3	3.0%	-72.4	51.7%
Palm Beach County	28.7%	-45.5	7.4%	-49.5	36.5%
Ft. Lauderdale	39.2%	-31.3	3.7%	-72.6	44.9%

SOURCE: SMITH TRAVEL RESEARCH, INC.

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Collier Comp Set – ADR (\$)

July 2020

	Trans	% Δ 19-20	Grp	% Δ 19-20	Total
Naples MSA	\$200.80	+2.8	\$123.20	-19.3	\$195.37
Miami-Hialeah	\$118.20	-27.0	\$77.70	-47.0	\$107.47
Florida Keys	\$271.53	+10.8	\$262.81	+16.2	\$270.84
Ft. Myers	\$148.47	+4.8	\$84.90	-18.2	\$140.78
Sarasota-Bradenton	\$129.55	+3.6	\$76.00	-27.3	\$122.40
Clearwater	\$142.80	-12.7	\$84.86	-34.8	\$139.29
St. Petersburg	\$150.13	-7.0	\$100.44	-23.0	\$146.56
Palm Beach County	\$109.84	-18.3	\$224.45	+80.0	\$132.35
Ft. Lauderdale	\$100.90	-16.6	\$64.82	-46.7	\$96.33

SOURCE: SMITH TRAVEL RESEARCH, INC.

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Party Size/LOS

Collier July 2020

- This July, visitor party size averaged **2.8** travelers who stayed for **2.8 nights** in the Naples, Marco Island, Everglades area (***July 2019: 2.9 people; 3.0 nights***).

Thank you!