

Collier County Tourism Research

2002 Annual Summary

Presented to:

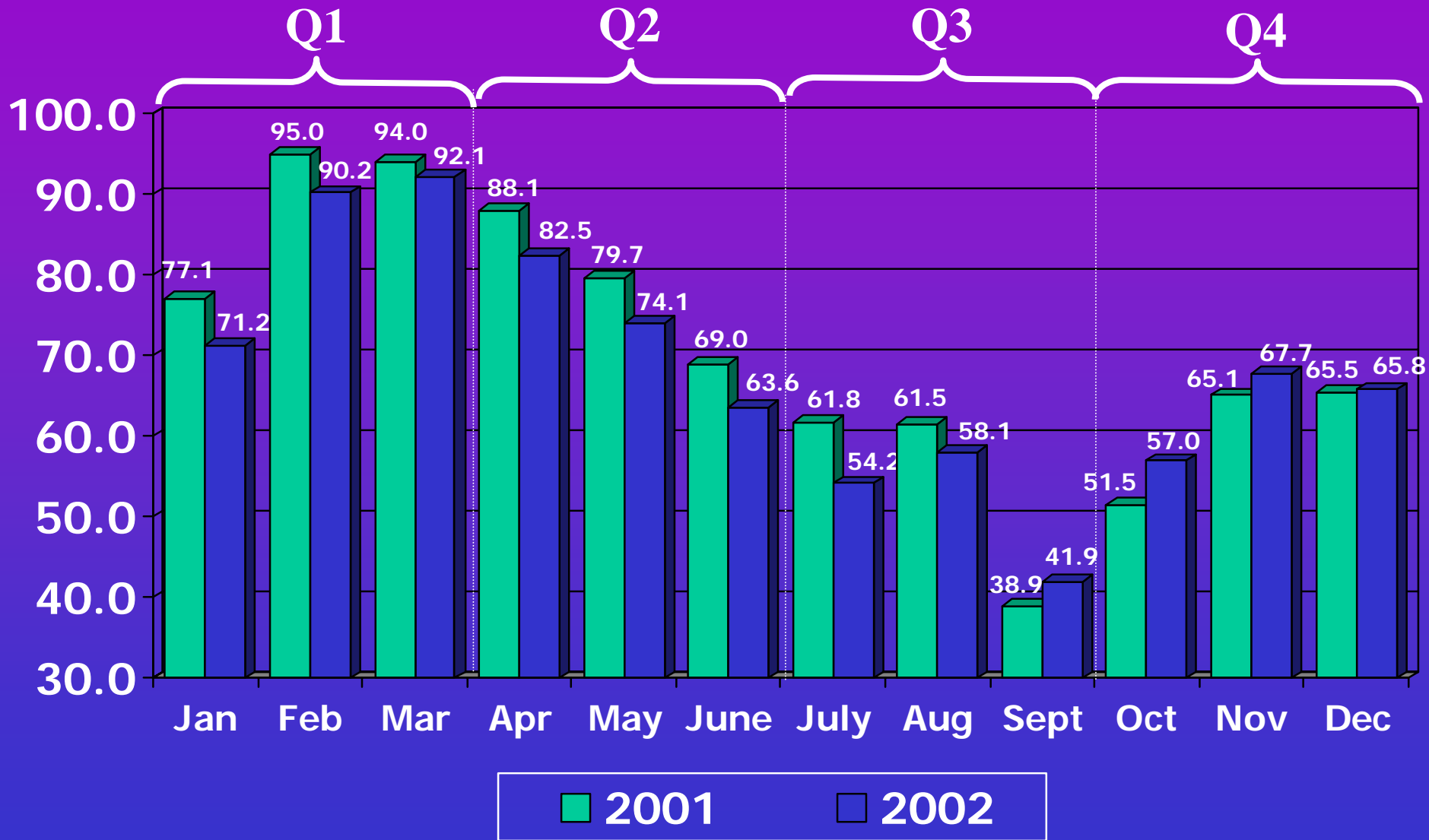
**The Collier County Board of County
Commissioners**

By:

Research Data Services, Inc.

February 2003

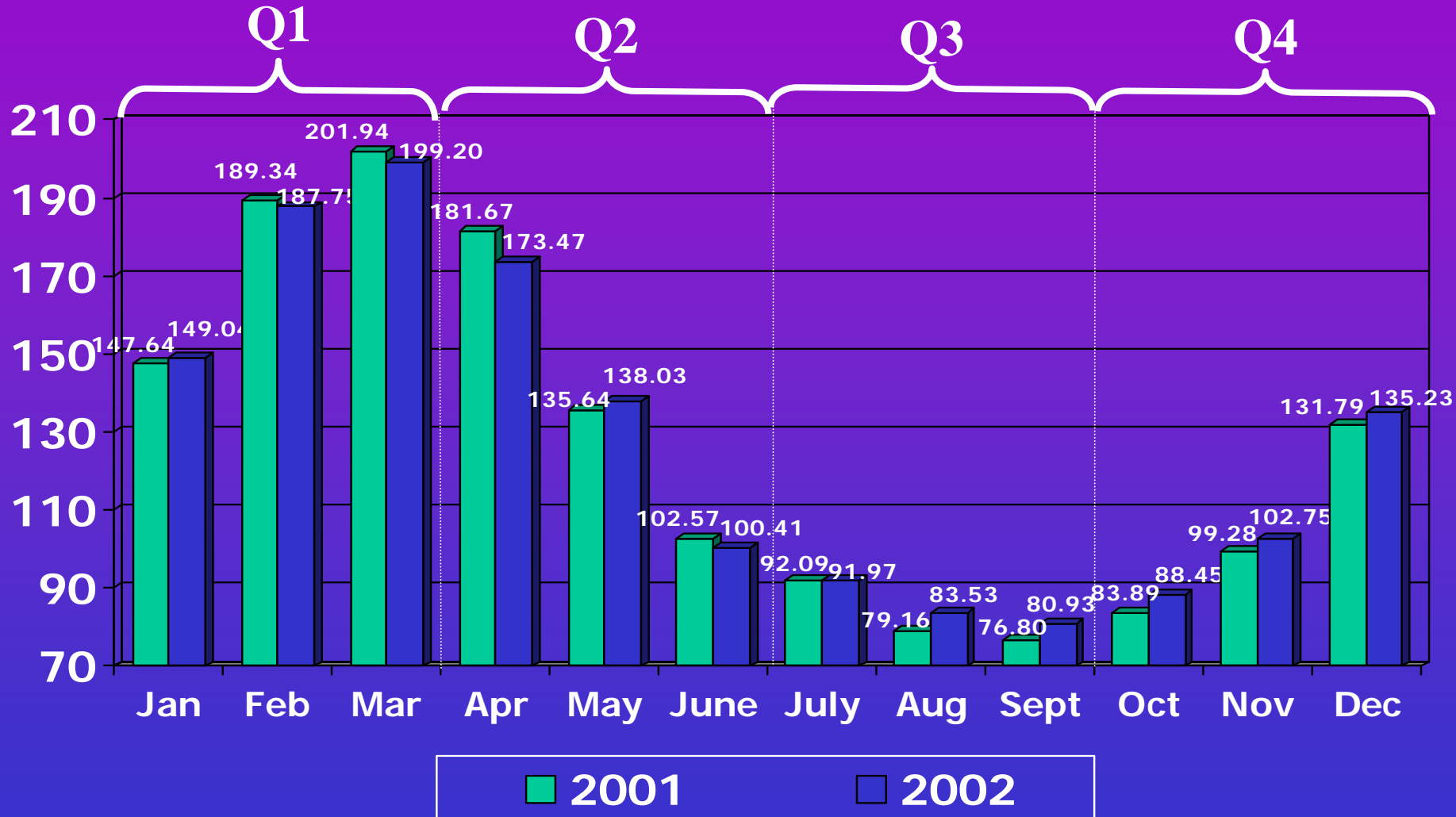
Collier County Occupancy 2002



Survey Base: Estimated 8,646 rooms

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Collier County Average Daily Room Rate 2002



Collier County

Monthly Occupancy/ADR 2002

	Occupancy		ADR	
	2002	Pt. Δ	2002	% Δ
January	71.2%	-5.9 pts.	\$149.04	+0.9%
February	90.2	-4.8	187.75	-0.8
March	92.1	-1.9	199.20	-1.4
April	82.5	-5.6	173.47	-4.5
May	74.1	-5.6	138.03	+1.8
June	63.6	-5.4	100.41	-2.1
July	54.2	-7.6	91.97	-0.1
August	58.1	-3.4	83.53	+5.5
September	41.9	+3.0	80.93	+5.4
October	57.0	+5.5	88.45	+5.4
November	67.7	+2.6	102.75	+3.5
December	65.8	+0.3	135.23	+2.6

Collier County

Quarterly Occupancy/ADR 2002

	Occupancy (Avg.)		ADR (Avg.)	
	2002	Pt. Δ	2002	% Δ
Quarter 1	84.5%	-4.2 pts.	\$178.66	-0.5%
Quarter 2	73.4	-5.5	137.30	-1.9
Quarter 3	51.4	-2.7	85.48	+3.4
Quarter 4	63.5	+2.8	108.81	+3.6

Collier County Number of Visitors

2002 Estimates

	<u>2001</u>	<u>2002</u>	<u>Δ%</u>
Quarter 1	512,827	496,281	-3.2
Quarter 2	315,131	299,354	-5.0
Quarter 3	217,672	214,584	-1.4
Quarter 4	275,489	299,069	+8.6
YTD	1,321,119	1,309,288	-0.9
Total	1,321,119	1,309,288	-0.9

Collier County Expenditures

2002 Estimates

	<u>2001</u>	<u>2002</u>	<u>Δ %</u>
Quarter 1	\$238,557,202	\$231,166,852	-3.1
Quarter 2	166,858,733	158,681,741	-4.9
Quarter 3	67,706,451	68,238,908	+0.8
Quarter 4	108,478,472	118,604,575	+9.3
YTD	\$581,600,858	\$576,692,076	-0.8
Total	\$581,600,858	\$576,692,076	-0.8

Impacts of Collier County Tourism

2002 Estimates (Direct & Induced)

	<u>2001</u>	<u>2002</u>
Quarter 1	\$355,688,789	\$344,669,777
Quarter 2	248,786,371	236,594,476
Quarter 3	100,950,318	101,744,212
Quarter 4	161,741,401	176,839,421
YTD	\$867,166,879	\$859,847,886
Total	\$867,166,879	\$859,847,886

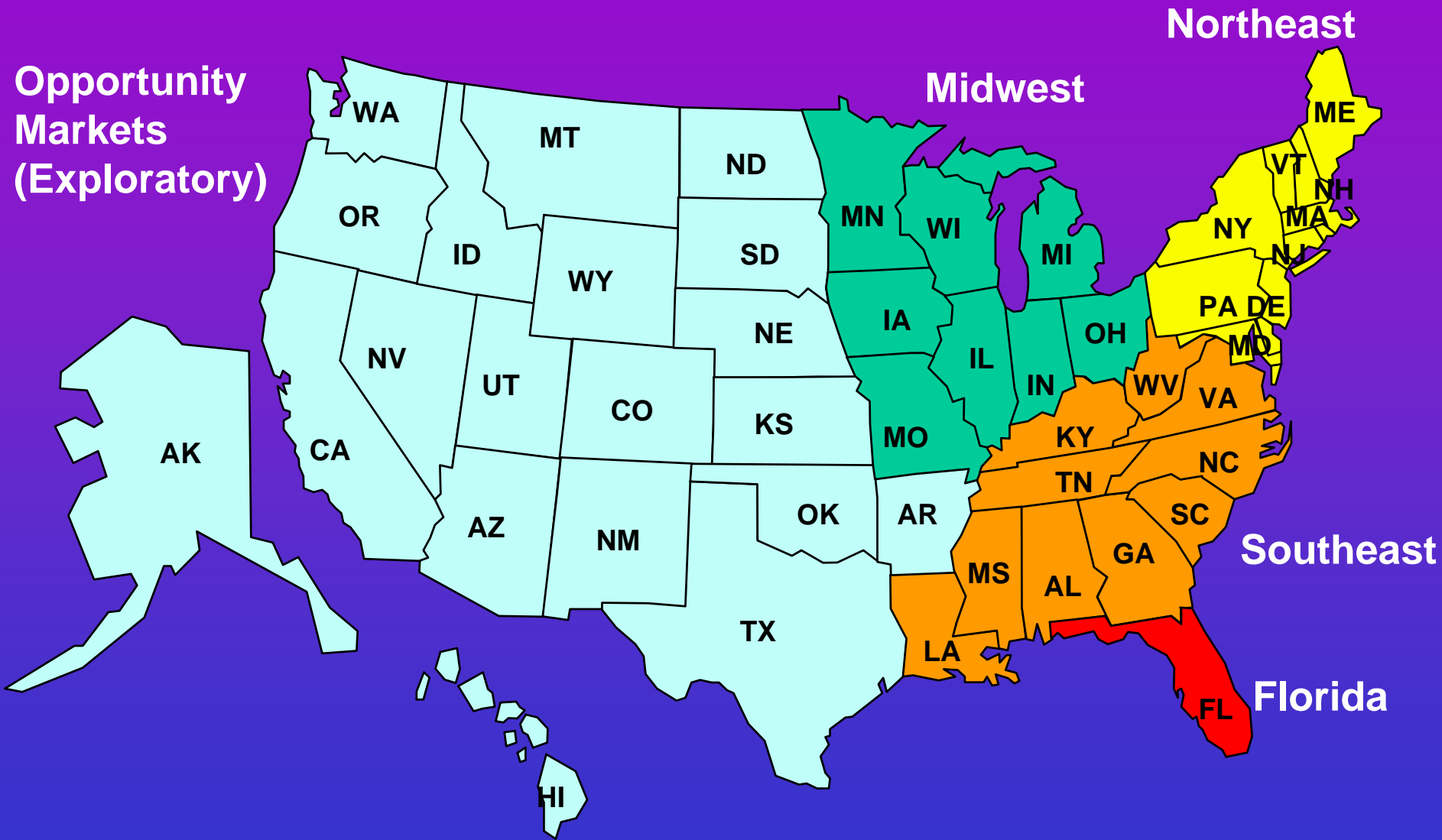
Purpose of Trip

2002 Visitors

	First Quarter		Second Quarter		Third Quarter		Fourth Quarter	
	2001	2002	2001	2002	2001	2002	2001	2002
Leisure	80.3%	80.7%	77.0%	77.2%	74.3%	75.1%	77.6%	73.1%
Business	13.4	14.2	18.0	17.3	21.7	21.7	16.3	19.6
Meetings	6.3	5.1	5.0	5.5	4.0	3.2	6.1	7.3

Regions

Opportunity
Markets
(Exploratory)



Visitor Origins

2002 Visitors

	First Quarter		Second Quarter		Third Quarter		Fourth Quarter	
	2001	2002	2001	2002	2001	2002	2001	2002
Florida	21.3%	24.5%	41.8%	43.5%	50.4%	52.8%	41.3%	37.7%
Southeast	8.2	7.7	8.5	8.9	9.4	8.9	6.6	9.7
Northeast	28.7	28.0	13.1	12.0	8.8	8.4	14.1	16.4
Midwest	25.3	27.0	14.6	16.9	10.4	11.5	16.1	17.0
Canada	4.8	3.7	3.0	1.8	2.7	1.7	2.2	1.9
Europe	4.0	3.5	12.7	9.0	9.3	7.9	8.1	11.1
US Opp. Mkts.	7.7	5.6	6.3	7.9	9.0	8.8	11.6	6.2

Estimated Impacts of Tourism on Collier County's Economy

Employment Effect:

	<u>2001</u>
Direct	17,493 jobs (e)
Direct + Indirect	23,696 jobs (e)
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Multiplier	1.3546

Estimated Impacts of Tourism on Collier County's Economy

Wage Effect:

	<u>2001</u>
Direct	\$394,930,107 (e)
Direct + Indirect	\$586,036,785 (e)
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Multiplier	1.4839

