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Naples, Marco Island, Everglades Convention and Visitors Bureau

January 2011 Visitor Profile



Prepared for:

Collier County Board of County Commissioners

and

Naples, Marco Island, Everglades Convention and Visitors Bureau

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Executive Summary: January 2011

1. The month of January's activity level was affected by weather and related flight disruptions. Some 146,800 visitors traveled to the Naples, Marco Island, Everglades area this January **(-1.7%)**, bringing \$103,713,513 of economic impact to the County **(-2.5%)**.
2. Collier's nearby drive markets and increased European census moderated decreases in visitation from the Northeast, Midwest, and Canada. Visitors' origin distribution is as follows:

<u>Visitor Estimates</u>	<u>Jan. '10 Visitors</u>	<u>Jan. '11 Visitors</u>	<u>Δ Vis.</u>
Florida	43,297	44,921	+1,624
Southeast	9,854	10,276	+ 422
Northeast	44,790	42,572	- 2,218
Midwest	29,263	27,598	- 1,665
Canada	3,285	2,495	- 790
Europe	12,690	13,506	+ 816
Markets of Opportunity	6,121	5,432	- 689
Total	149,300	146,800	- 2,500

3. When visitors describe the Naples, Marco Island, Everglades area their images focus on features such as:
 - Warm Weather
 - Dining Opportunities
 - Safety
 - Unspoiled Environment
 - White, Sandy Beaches
 - Relaxation
 - Upscale Lodgings
 - Sunning on the Beach
 - Upscale Shopping
 - Value for the Money
 - Family Atmosphere

Naples, Marco Island, Everglades: January 2011 Summary

4. Although a larger proportion of January visitors drove to reach Collier (**2010: 34.4%; 2011: 37.6%**), the majority (60.7%) flew to the area (**2010: 65.7%**). Nearly three of every four of these deplaned at Southwest Florida International Airport (RSW) (**2010: 72.7%; 2011: 71.2%**). Miami International was cited by 9.0% as their airport of deplanement (**2010: 6.4%**).
5. The destination's January census is dominated by repeat visitors (**2010: 69.8%; 2011: 73.6%**).
6. The destination's **group/business** travel segment grew in January (**2010: 25.9%; 2011: 28.0%**).
7. The Internet is cited by 90.1% of visitors as a source of their travel information. Hotel and airline websites; Expedia; www.paradisecoast.com; TripAdvisor; Travelocity; and traveler reviews/blogs are cited most frequently by visitors.
8. Two thirds of January visitors (**67.4%**) say they prefer printed visitor guides for destination information. Some 45.5% like using online virtual visitor guides.
9. Over half of all visitors noticed information about the Naples, Marco Island, Everglades area (**2011: 52.1%**). For a majority of these (**56.9%**), such materials clearly influence visitors' Collier trip planning.
10. The majority of January visitors (**96.3%**) state that they are satisfied with their stay in Collier and three fifths of all visitors (**60.2%**) plan to return next year (**2010: 53.6%**).
11. January's visitor group averages 50.6 years of age, with a household income of \$148,972.

Naples, Marco Island, Everglades:
January 2011 Visitor Profile



January 2011 Visitor Profile – Naples, Marco Island, Everglades

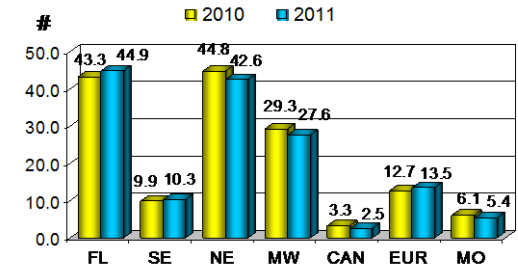
Visitor Volume	Calendar Year		% Δ '09/'10	January		% Δ '10/'11
	2010	2009		2010	2011	
Visitors (#)	1,383,500	1,338,800	+3.3	149,300	146,800	-1.7
Room Nights	2,052,310	1,985,930	+3.3	200,260	195,500	-2.4
Econ. Impact *	\$1,166,078,894	\$1,127,916,004	+3.4	\$106,404,619	\$103,713,513	-2.5

Visitor Origin	C.Y. # of Visitors			% Δ '09/'10	Rel %	January # of Visitors			% Δ '10/'11
	2009	2010	2010			2010	2011	2011	
Florida	524,545	529,939	+1.0	29.0%	43,297	30.6%	44,921	+3.8	
Southeast	88,851	94,848	+6.7	6.6	9,854	7.0	10,276	+4.3	
Northeast	237,040	251,966	+6.3	30.0	44,790	29.0	42,572	-5.0	
Midwest	205,594	217,360	+5.7	19.6	29,263	18.8	27,598	-5.7	
Canada	31,810	33,473	+5.2	2.2	3,285	1.7	2,495	-24.0	
Europe	182,064	185,672	+2.0	8.5	12,690	9.2	13,506	+6.4	
Markets of Opp.	68,896	70,242	+2.0	4.1	6,121	3.7	5,432	-11.3	
Total	1,338,800	1,383,500	+3.3	100.0	149,300	100.0	146,800	-1.7	

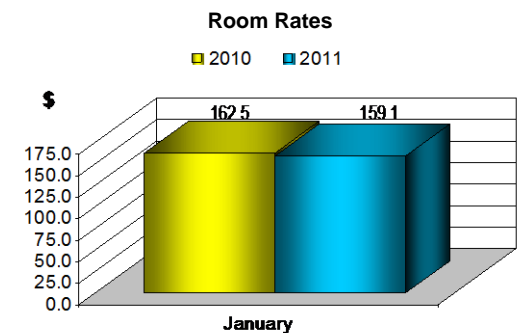
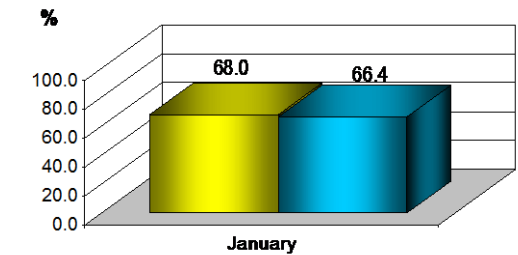
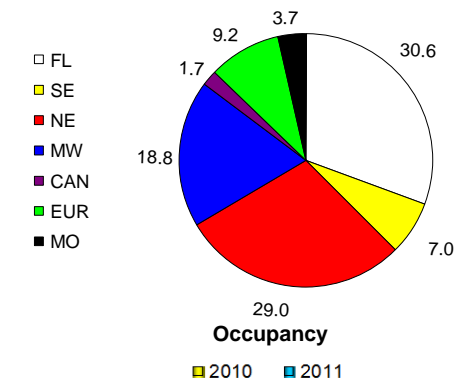
Occupancy	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
Occ. 2009	61.2%	78.3%	80.3%	70.6%	60.9%	55.9%	63.6%	45.7%	41.9%	51.8%	59.3%	60.4%
Occ. 2010	68.0	81.6	83.3	75.8	62.3	57.8	60.7	43.7	41.1	58.8	60.6	58.9
Occ. 2011	66.4											
Δ % ('10/'11)	-2.4%											
ADR 2009	\$175.9	\$249.6	\$241.1	\$213.5	\$149.4	\$128.7	\$105.6	\$98.6	\$99.4	\$111.6	\$117.8	\$166.7
ADR 2010	162.5	229.9	235.8	205.1	145.9	129.5	107.4	94.8	101.5	114.4	121.7	161.4
ADR 2011	159.1											
Δ % ('10/'11)	-2.1%											
RevPAR 2009	\$107.7	\$195.4	\$193.6	\$150.7	\$91.0	\$71.9	\$67.2	\$45.1	\$41.6	\$57.8	\$69.9	\$100.7
RevPAR 2010	110.5	187.6	196.4	155.5	90.9	74.9	65.2	41.4	41.7	67.3	73.8	95.1
RevPAR 2011	105.6											
Δ % ('10/'11)	-4.4%											

* Based on Minnesota Implan Multipliers.

January Visitor Origins (in Thousands)

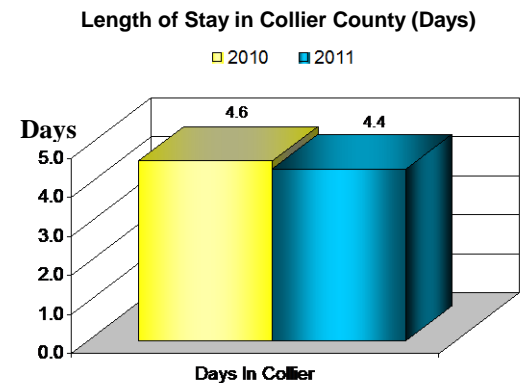
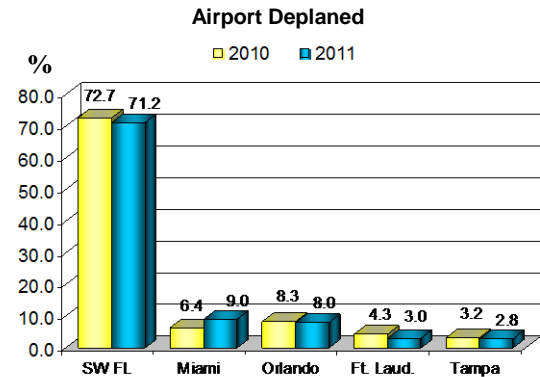
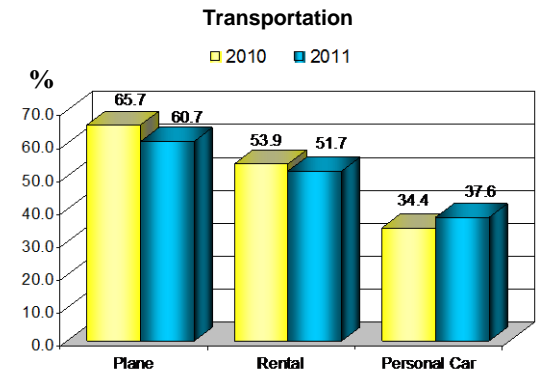


January 2011 Visitor Origins (%)



January 2011 Visitor Profile -- Naples, Marco Island, Everglades

	January 2010	January 2011
Transportation Mode (Multiple Response)		
Plane	65.7%	60.7%
Rental Car	53.9	51.7
Personal Car	34.4	37.6
Airport Deplaned (Base: Flew)		
Southwest Florida International	72.7%	71.2%
Miami International	6.4	9.0
Orlando International/Sanford	8.3	8.0
Ft. Lauderdale International	4.3	3.0
Tampa International	3.2	2.8
Purpose of Trip (Multiple Response)		
Vacation/Weekend Getaway	75.3%	72.4%
Business Travelers/Conferences/Business Meetings	25.9	28.0
Visit with Friends and Relatives	12.0	13.4
Special Events	7.1	6.8
First Visit to Collier County (% Yes)	30.2%	26.4%
First Visit to Florida (% Yes)	5.5	5.3
Length of Stay in Collier County (# of days)	4.6 days	4.4 days
Party Size (# of People)	2.2 people	2.2 people
Satisfaction with Collier County		
Very Satisfied	87.5%	87.0%
Satisfied	10.0	9.3
Satisfaction Level (Very Satisfied + Satisfied)	97.5%	96.3%
Recommend Collier to Friends/Relatives		
Yes	96.3%	93.5%
Expense Relative to Expectations		
More Expensive	4.3%	11.2%
Less Expensive	0.6	0.4
As Expected	89.8	84.1
Don't Know	5.3	4.3
Plan to Return (% Yes)		
To Local Area	92.3%	93.0%
Next Year (Base: Return to Local Area)	58.1	64.7



January 2011 Visitor Profile -- Naples, Marco Island, Everglades

	<u>January 2010</u>	<u>January 2011</u>
Activities Enjoyed in Area (Multiple Response)		
Dining Out	64.6%	68.0%
Beach	58.1	60.6
Relaxing	61.5	58.4
Pool	28.1	34.3
Shopping	26.0	31.3
Sightseeing	15.0	20.7
Visiting with Friends/Relatives	16.3	17.6
Walking	16.0	15.4
Everglades Adventures/Nature	12.8	15.2
Reading	14.4	14.8
Bars/Nightlife	10.9	12.6
Museums	N/A	11.9
Art Galleries/Shows/Fairs	N/A	10.7
Swimming	12.4	10.6
Golfing	9.6	10.1
Average Age Head of Household (Years)		
	50.4	50.6
Median Annual Household Income		
	\$150,154	\$148,972
See/Read/Hear Collier Message (% Yes)		
	54.6%	52.1%
Type of Message Seen (Multiple Response)		
Internet	67.7%	69.6%
Newspaper	27.6	30.7
Magazine	24.1	24.3
Travel Guides/Visitor Guides/Brochures	11.4	12.6
Television	12.5	11.4
Influenced by Collier Message		
<i>(Base: Respondents Reporting See/Read/Hear Message)</i>	54.3%	56.9%
Collier Base Budget		
Total	\$1,051.59	\$1,042.44
Per Person/Day	477.99	473.84
Per Person/Trip	103.91	107.69
Avg. Party Budget Breakdown		
Accommodations	\$530.21	\$515.61
Food/Entertainment	338.00	332.12
Retail	162.18	167.19

