

# RESEARCH DATA SERVICES, INC.

777 SOUTH HARBOUR ISLAND BOULEVARD • SUITE 260  
TAMPA, FLORIDA 33602  
TEL (813) 254-2975 • FAX (813) 223-2986

## Naples, Marco Island, Everglades Convention and Visitors Bureau

### April 2011 Visitor Profile



***Prepared for:***

Collier County Board of County Commissioners

and

Naples, Marco Island, Everglades Convention and Visitors Bureau

***Prepared by:***

Walter J. Klages, Ph.D.

President

Research Data Services, Inc.

***Research@KlagesGroup.com***

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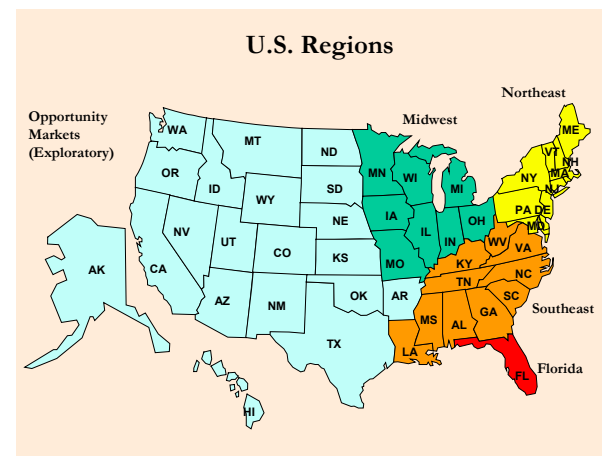
**Executive Summary: April 2011**

- In April, Collier's tourism performance was strong, with 115,100 travelers seeking out the destination (+3.7%). Occupancy was stable (+0.4%) and ADR increased by +5.9%. April tourism contributed fully \$143,814,405 of value added transactions to the County's economy (+7.6%). In terms of key leading indicators, the three-month forward-looking reservation barometer projects ongoing expansion of Collier's tourism activity. Specifically:

<b>% of Properties</b>	<b>2009</b>	<b>2010</b>	<b>2011</b>
<b>Reporting Reservations:</b>			
Up	5.9%	18.8%	37.8%
The Same	11.8	40.6	21.6
Down	79.4	40.6	35.1

- The destination's regional origin markets are as follows:

<b>April Visitation</b>	<b>2010 Visitor #</b>	<b>2011 Visitor #</b>	<b>% Δ</b>
Florida	38,295	37,177	-2.9
Southeast	6,105	6,791	+11.2
Northeast	22,311	25,552	+14.5
Midwest	21,423	21,409	-0.1
Canada	3,219	3,683	+14.4
Europe	14,430	14,848	+2.9
Mkts. of Opp.	5,217	5,640	+8.1
<b>Total</b>	<b>111,000</b>	<b>115,100</b>	<b>+3.7</b>



## *Naples, Marco Island, Everglades: April 2011 Summary*

3. Visitors' brand images focus on the following attributes when describing the Naples, Marco Island, Everglades area (*in rank order*):
  - Warm Weather
  - Unspoiled Environment
  - Safety
  - Relaxation
  - Dining Opportunities
  - White, Sandy Beaches
  - Upscale Lodgings
  - Sunning on the Beach
  - Value for the Money
  - Upscale Shopping
  - Safe Beaches for Children
  - Family Atmosphere
  - Arts and Culture
4. This April, nearly two-thirds of Collier's visitors (**63.4%**) flew to reach the destination (**2010: 62.1%**). While Southwest Florida International (RSW) remains the primary airport of deplanement (**2010: 64.8%; 2011: 68.8%**), note that Miami's International Airport has increased in importance (**2010: 11.7%; 2011: 14.0%**).
5. The Internet is cited by 80.3% of April visitors as a principal source of travel information. URL's most frequently accessed by our travelers include hotel, airline, and destination websites. Seeking to confirm choices through other visitors' trip experiences, 19.0% of visitors access traveler reviews and/or social networking sites. Visitors also relate use of sites such as Hotels.com, Expedia, Orbitz, and Travelocity.
6. The vast majority of Collier patrons (**92.4%**) express satisfaction with their stay in the destination; the majority (**61.8%**) plan to return to the Naples, Marco Island, Everglades area next year. (**2010: 61.1%**).
7. This April's visitors are, on average, 46.9 years of age and command a median household income of \$140,282.

**Naples, Marco Island, Everglades:**  
*April 2011 Visitor Profile*

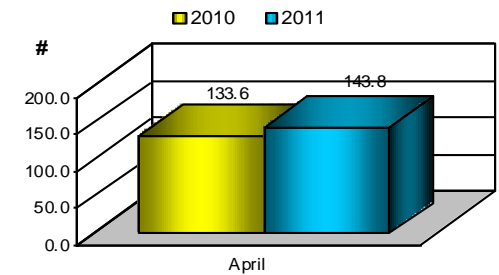


# April 2011 Visitor Profile – Naples, Marco Island, Everglades

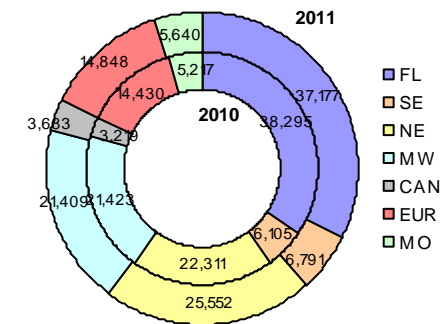
Visitor Volume	Calendar Year	Year to Date			April		% Δ
	2010	2010	2011	'10/'11	2010	2011	'10/'11
Visitors (#)	1,383,500	606,300	626,800	+3.4	111,000	115,100	+3.7
Room Nights	2,052,310	868,260	890,100	+2.5	195,600	198,600	+1.5
Econ. Impact *	\$1,166,078,894	\$577,621,601	\$613,899,122	+6.3	\$133,609,256	\$143,814,405	+7.6

Visitor Origin	YTD # of Visitors			Rel %	April # of Visitors			% Δ
	2010	2011	'10/'11		2010	2011	'10/'11	
Florida	163,352	173,654	+6.3	34.5%	38,295	32.3%	37,177	-2.9
Southeast	39,688	43,789	+10.3	5.5	6,105	5.9	6,791	+11.2
Northeast	165,688	176,574	+6.6	20.1	22,311	22.2	25,552	+14.5
Midwest	125,409	126,330	+0.7	19.3	21,423	18.6	21,409	-0.1
Canada	17,961	15,337	-14.6	2.9	3,219	3.2	3,683	+14.4
Europe	65,028	61,676	-5.2	13.0	14,430	12.9	14,848	+2.9
Markets of Opp.	29,174	29,440	+0.9	4.7	5,217	4.9	5,640	+8.1
<b>Total</b>	<b>606,300</b>	<b>626,800</b>	<b>+3.4</b>	<b>100.0</b>	<b>111,000</b>	<b>100.0</b>	<b>115,100</b>	<b>+3.7</b>

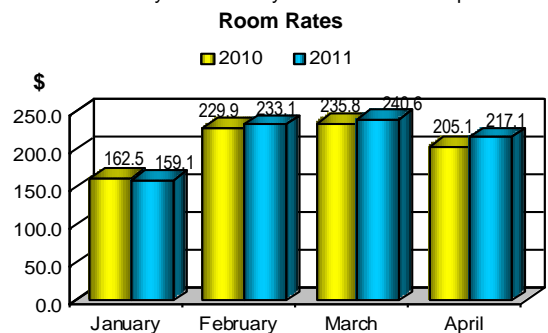
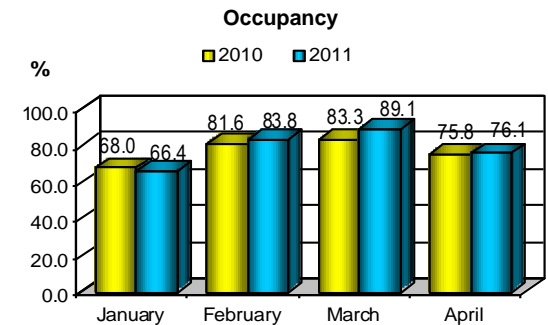
April Economic Impact (in Millions)



April 2011 Visitor Origins



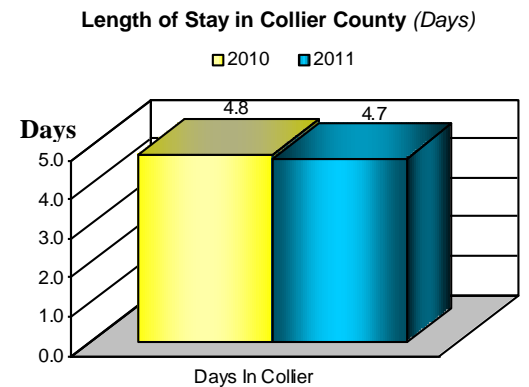
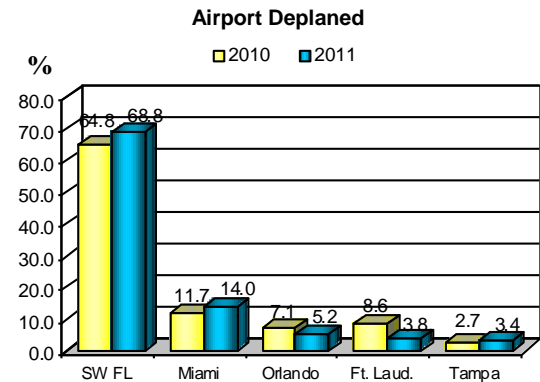
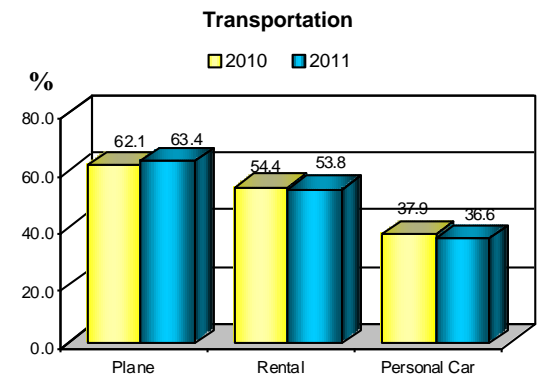
Occupancy	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
Occ. 2009	61.2%	78.3%	80.3%	70.6%	60.9%	55.9%	63.6%	45.7%	41.9%	51.8%	59.3%	60.4%
Occ. 2010	68.0	81.6	83.3	75.8	62.3	57.8	60.7	43.7	41.1	58.8	60.6	58.9
Occ. 2011	66.4	83.8	89.1	76.1								
Δ % ('10/'11)	-2.4%	+2.7%	+7.0%	+0.4%								
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	233.1	240.6	217.1								
Δ % ('10/'11)	-2.1%	+1.4%	+2.0%	+5.9%								
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	195.3	214.4	165.2								
Δ % ('10/'11)	-4.4%	+4.1%	+9.2%	+6.2%								



\* Based on Minnesota Implan Multipliers.

# April 2011 Visitor Profile -- Naples, Marco Island, Everglades

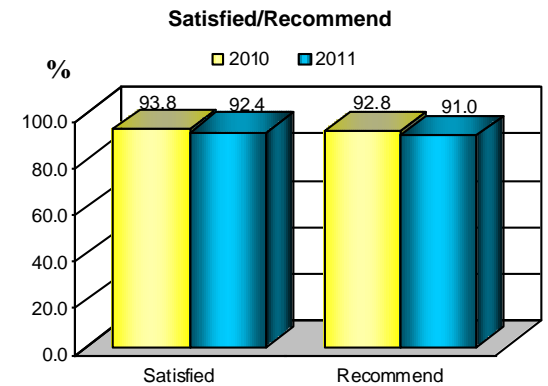
	<u>April 2010</u>	<u>April 2011</u>
<b>Transportation Mode</b> <i>(Multiple Response)</i>		
Plane	62.1%	63.4%
Rental Car	54.4	53.8
Personal Car	37.9	36.6
<b>Airport Deplaned</b> <i>(Base: Flew)</i>		
Southwest Florida International	64.8%	68.8%
Miami International	11.7	14.0
Orlando International/Sanford	7.1	5.2
Fort Lauderdale	8.6	3.8
Tampa International	2.7	3.4
<b>Purpose of Trip</b> <i>(Multiple Response)</i>		
Vacation	71.3%	75.4%
Business Travelers/Conferences/Business Meetings	22.5	20.7
Visit with Friends and Relatives	11.2	12.7
<b>First Visit to Collier County</b> <i>(% Yes)</i>		
	44.5%	40.6%
<b>First Visit to Florida</b> <i>(% Yes)</i>		
	6.8%	4.9%
<b>Length of Stay in Collier County</b> <i>(# of days)</i>		
	4.8 days	4.7 days
<b>Party Size</b> <i>(# of People)</i>		
	2.6 people	2.6 people
<b>Party Composition</b> <i>(Multiple Response)</i>		
Couple	43.2%	44.5%
Family	31.8	34.8
Single	12.9	11.8
Group of Friends	6.8	5.7



## April 2011 Visitor Profile -- Naples, Marco Island, Everglades

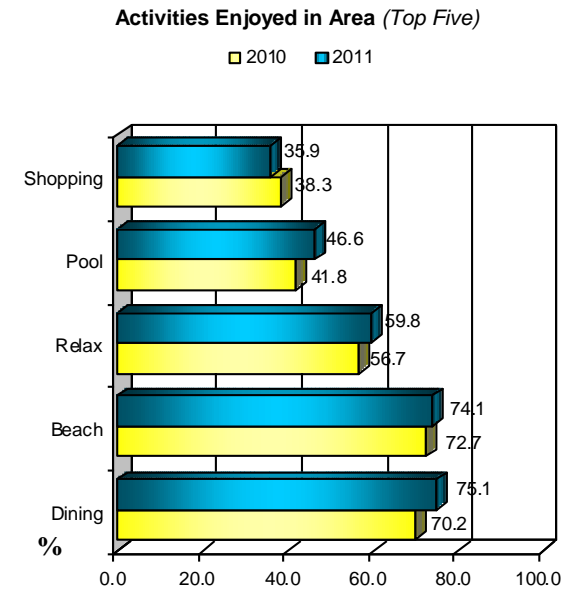
	<u>April 2010</u>	<u>April 2011</u>
<b>Satisfaction with Collier County</b>		
Very Satisfied	89.0%	86.6%
Satisfied	4.8	5.8
<b>Satisfaction Level</b> ( <i>Very Satisfied + Satisfied</i> )	<b>93.8%</b>	<b>92.4%</b>

	<u>April 2010</u>	<u>April 2011</u>
<b>Recommend Collier to Friends/Relatives</b>		
Yes	92.8%	91.0%



### Activities Enjoyed in Area (*Multiple Response*)

Activity	2010 (%)	2011 (%)
Dining Out	70.2%	75.1%
Beach	72.7	74.1
Relaxing	56.7	59.8
Pool	41.8	46.6
Shopping	38.3	35.9
Swimming	39.6	35.6
Reading	20.6	24.3
Sunning	19.7	21.6
Sightseeing	22.4	21.0
Visit with Friends/Relatives	22.6	20.9
Everglades Adventures/Nature	14.6	13.2
Walking	13.6	11.7
Golfing	10.5	8.5



# April 2011 Visitor Profile -- Naples, Marco Island, Everglades

	April 2010	April 2011
<b>Expense Relative to Expectations</b>		
More Expensive	11.2%	7.1%
Less Expensive	1.8	1.9
As Expected	83.0	82.9
Don't Know	4.0	8.1
<b>Plan to Return (% Yes)</b>		
To Local Area	92.1%	89.8%
Next Year (Base: Return to Local Area)	66.3	68.8
<b>Collier Base Budget</b>		
Total	\$2,098.99	\$2,178.82
Per Person/Day	807.30	838.01
Per Person/Trip	168.19	178.30
<b>Avg. Party Budget Breakdown</b>		
Accommodations	\$807.84	\$849.06
Food/Entertainment	772.63	802.56
Retail	353.16	361.50
<b>Average Age Head of Household (Years)</b>		
	46.4	46.9
<b>Median Annual Household Income</b>		
	\$131,111	\$140,282
<b>See/Read/Hear Collier Message (% Yes)</b>		
	42.8%	45.7%
<b>Type of Message Seen (Multiple Response)</b>		
Internet	81.9%	78.3%
Television	12.7	26.1
Newspaper	27.8	24.5
Magazine	22.8	20.5
Travel Guides/Visitor Guides/Brochures	10.9	9.4
<b>Influenced by Collier Message</b>		
(Base: Respondents Reporting See/Read/Hear Message)	39.4%	35.6%

