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

### May 2011 Visitor Profile



***Prepared for:***

Collier County Board of County Commissioners

and

Naples, Marco Island, Everglades Convention and Visitors Bureau

***Prepared by:***

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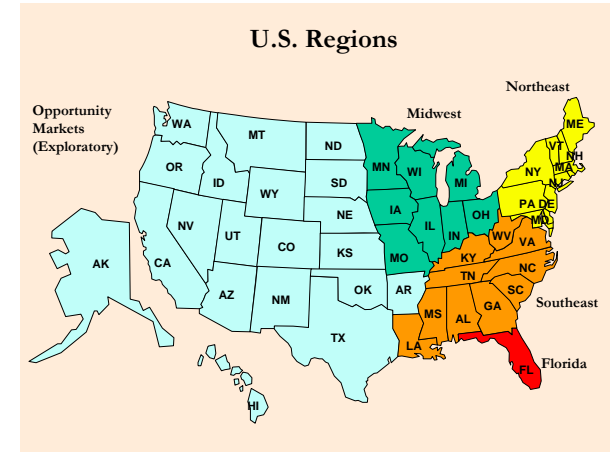
*Executive Summary: May 2011*

- Collier's tourism industry performed well during the month of May, with 120,100 travelers seeking out the destination (+7.5%). Occupancy grew by +6.7%, while ADR increased by +2.9%. Tourist activity contributed fully \$108,863,278 of value added transactions to the County's economy (+10.8%). The three-month forward-looking reservation barometer, a key leading indicator, projects Collier's tourism as expanding. Specifically:

<b>% of Properties</b>		<b>2009</b>	<b>2010</b>	<b>2011</b>
<b>Reporting Reservations:</b>				
Up		3.2%	18.4%	33.3%
The Same		22.6	26.3	16.7
Down		64.5	44.7	36.1

- This May, **ALL** of Collier's core feeder markets showed growth. The destination's regional origin markets are as follows:

<b>May Visitation</b>	<b>2010 Visitor #</b>	<b>2011 Visitor #</b>	<b>% Δ</b>
Florida	55,627	57,528	+3.4
Southeast	8,154	9,968	+22.2
Northeast	15,191	16,214	+6.7
Midwest	12,399	14,652	+18.2
Canada	1,452	1,681	+15.8
Europe	14,409	14,893	+3.4
Mkts. of Opp.	4,468	5,164	+15.6
<b>Total</b>	<b>111,700</b>	<b>120,100</b>	<b>+7.5</b>



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

3. Visitors' brand images focus on the following attributes when describing the Naples, Marco Island, Everglades area (*in rank order*):
- Unspoiled Environment
  - Warm Weather
  - Safety
  - White, Sandy Beaches
  - Upscale Lodgings
  - Dining Opportunities
  - Relaxation
  - Value for the Money
  - Sunning on the Beach
  - Upscale Shopping
  - Family Atmosphere
  - Safe Beaches for Children
  - Good Golfing
  - Arts and Culture
4. This May, half of Collier's visitors (**50.1%**) flew to reach the destination (**2010: 45.4%**). Southwest Florida International (RSW) remains the primary airport of deplanement (**2010: 64.0%; 2011: 62.3%**), but Miami International Airport has increased importance (**2010: 17.4%; 2011: 23.7%**).
5. The Internet is cited by 86.6% of May visitors as a principal source of travel information. URL's most frequently accessed by our travelers include hotel, airline, and destination websites. Visitors also relate use of sites such as TripAdvisor, Expedia, Orbitz, Virgin, Hotels.com, and Travelocity.
6. The vast majority of Collier patrons (**95.3%**) express satisfaction with their stay in the destination. Fully 63.3% plan to return to the Naples, Marco Island, Everglades area next year. (**2010: 61.2%**).
7. This May's visitors are, on average, younger (**2010: 47.8 years of age; 2011: 47.0 years of age**) and command a median household income of \$131,136.

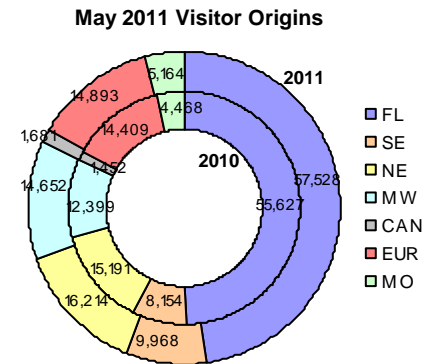
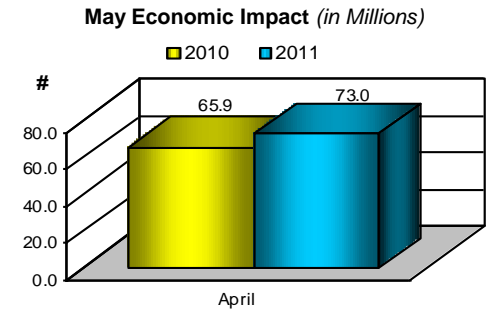
**Naples, Marco Island, Everglades:**  
*May 2011 Visitor Profile*



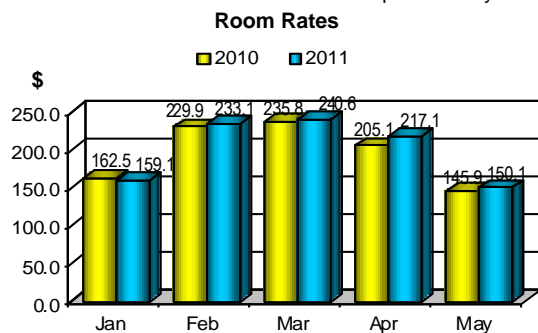
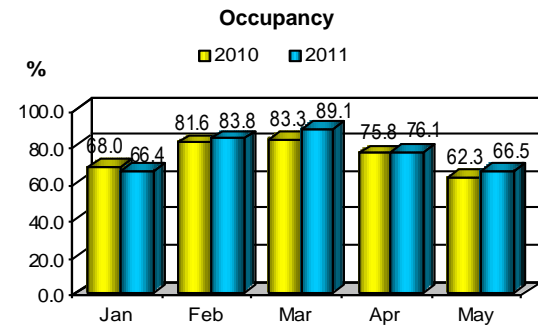
## May 2011 Visitor Profile – Naples, Marco Island, Everglades

Visitor Volume	Calendar Year	Year to Date		% Δ	May		% Δ
	2010	2010	2011	'10/'11	2010	2011	'10/'11
Visitors (#)	1,383,500	718,000	746,900	+4.0	111,700	120,100	+7.5
Room Nights	2,052,310	1,038,210	1,069,500	+3.0	169,950	179,400	+5.6
Direct Exp. (\$)	\$782,078,400	\$453,329,000	\$484,750,100	+6.9	\$65,923,500	\$73,013,600	+10.8

Visitor Origin	YTD # of Visitors			% Δ	May # of Visitors				% Δ
	2010	2011	'10/'11	Rel %	2010	Rel %	2011	'10/'11	
Florida	218,979	231,182	+5.6	49.8%	55,627	47.9%	57,528	+3.4	
Southeast	47,842	53,757	+12.4	7.3	8,154	8.3	9,968	+22.2	
Northeast	180,879	192,788	+6.6	13.6	15,191	13.5	16,214	+6.7	
Midwest	137,808	140,982	+2.3	11.1	12,399	12.2	14,652	+18.2	
Canada	19,413	17,018	-12.3	1.3	1,452	1.4	1,681	+15.8	
Europe	79,437	76,569	-3.6	12.9	14,409	12.4	14,893	+3.4	
Markets of Opp.	33,642	34,604	+2.9	4.0	4,468	4.3	5,164	+15.6	
<b>Total</b>	<b>718,000</b>	<b>746,900</b>	<b>+4.0</b>	<b>100.0</b>	<b>111,700</b>	<b>100.0</b>	<b>120,100</b>	<b>+7.5</b>	



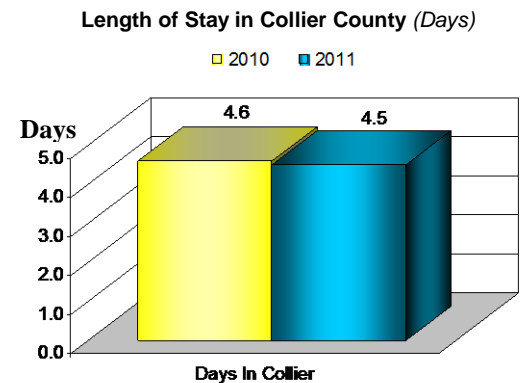
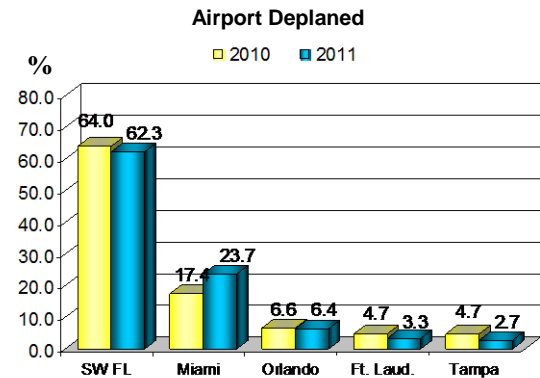
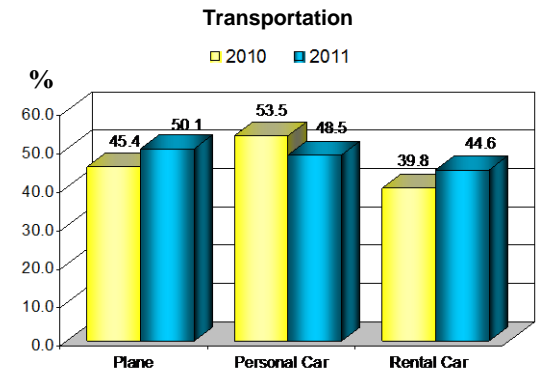
Occupancy	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
Occ. 2009	61.2%	78.3%	80.3%	70.6%	60.9%	55.9%	63.6%	45.7%	41.9%	51.8%	59.3%	60.4%
Occ. 2010	68.0	81.6	83.3	75.8	62.3	57.8	60.7	43.7	41.1	58.8	60.6	58.9
Occ. 2011	66.4	83.8	89.1	76.1	66.5							
<b>Δ % ('10/'11)</b>	<b>-2.4%</b>	<b>+2.7%</b>	<b>+7.0%</b>	<b>+0.4%</b>	<b>+6.7%</b>							
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	150.1							
<b>Δ % ('10/'11)</b>	<b>-2.1%</b>	<b>+1.4%</b>	<b>+2.0%</b>	<b>+5.9%</b>	<b>+2.9%</b>							
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	99.8							
<b>Δ % ('10/'11)</b>	<b>-4.4%</b>	<b>+4.1%</b>	<b>+9.2%</b>	<b>+6.2%</b>	<b>+9.8%</b>							



\* Based on Minnesota Implan Multipliers.

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

	<u>May 2010</u>	<u>May 2011</u>
<b>Transportation Mode</b> <i>(Multiple Response)</i>		
Plane	45.4%	50.1%
Personal Car	53.5	48.5
Rental Car	39.8	44.6
<b>Airport Deplaned</b> <i>(Base: Flew)</i>		
Southwest Florida International	64.0%	62.3%
Miami International	17.4	23.7
Orlando International/Sanford	6.6	6.4
Fort Lauderdale International	4.7	3.3
Tampa International	4.7	2.7
<b>Purpose of Trip</b> <i>(Multiple Response)</i>		
Vacation	81.1%	82.7%
Business Travelers/Conferences/Business Meetings	19.4	18.3
Visit with Friends and Relatives	5.4	5.3
<b>First Visit to Collier County</b> (% Yes)	49.2%	47.9%
<b>First Visit to Florida</b> (% Yes)	6.9%	4.5%
<b>Length of Stay in Collier County</b> (# of days)	4.6 days	4.5 days
<b>Party Size</b> (# of People)	2.2 people	2.3 people
<b>Party Composition</b> <i>(Multiple Response)</i>		
Couple	48.0%	46.9%
Family	32.6	33.2
Single	9.5	12.2
Group of Friends	4.7	5.0



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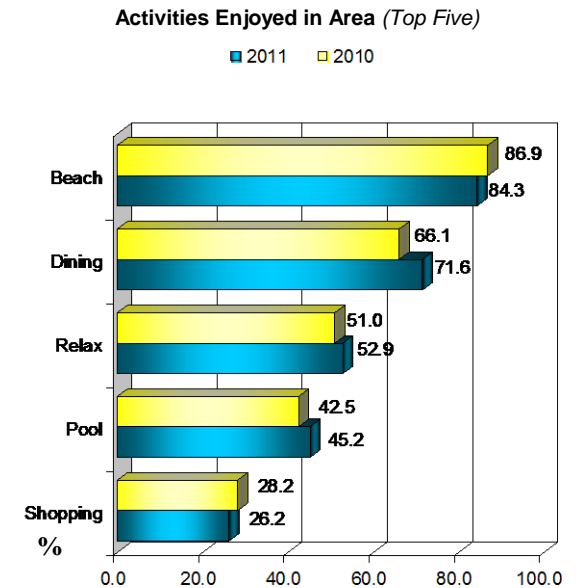
	<u>May 2010</u>	<u>May 2011</u>
<b>Satisfaction with Collier County</b>		
Very Satisfied	85.4%	87.2%
Satisfied	12.0	8.1
<b>Satisfaction Level</b> ( <i>Very Satisfied + Satisfied</i> )	<b>97.4%</b>	<b>95.3%</b>

<b>Recommend Collier to Friends/Relatives</b>		
Yes	96.3%	94.6%



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

Beach	86.9%	84.3%
Dining Out	66.1	71.6
Relaxing	51.0	52.9
Pool	42.5	45.2
Shopping	28.2	26.2
Sightseeing	17.4	22.1
Reading	24.5	20.2
Swimming	16.4	19.3
Everglades Adventures/Nature	18.8	17.5
Walking	15.9	15.6
Sunning	12.0	14.3
Sunsets	10.9	12.9
Bars & Nightlife	12.4	11.1
Visit with Friends/Relatives	9.4	10.4
Golfing	11.6	8.5



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

	<u>May 2010</u>	<u>May 2011</u>
<b>Expense Relative to Expectations</b>		
More Expensive	3.8%	1.9%
Less Expensive	5.1	4.8
As Expected	89.2	90.0
Don't Know	1.9	3.3
<b>Plan to Return (% Yes)</b>		
To Local Area	95.5%	93.0%
Next Year <i>(Base: Return to Local Area)</i>	64.1	68.1
<b>Collier Base Budget</b>		
Total	\$1,298.40	\$1,398.27
Per Person/Day	590.18	607.94
Per Person/Trip	128.30	135.10
<b>Avg. Party Budget Breakdown</b>		
Accommodations	\$515.06	\$535.09
Food/Entertainment	594.90	611.42
Retail	177.36	173.18
<b>Average Age Head of Household (Years)</b>		
	47.8	47.0
<b>Median Annual Household Income</b>		
	\$134,242	\$131,136
<b>See/Read/Hear Collier Message (% Yes)</b>		
	42.0%	42.7%
<b>Type of Message Seen (Multiple Response)</b>		
Internet	84.3%	84.9%
Television	44.5	45.4
Newspaper	31.3	34.0
Magazine	19.1	13.2
Travel Guides/Visitor Guides/Brochures	8.9	6.2
<b>Influenced by Collier Message</b>		
<i>(Base: Respondents Reporting See/Read/Hear Message)</i>	47.2%	47.0%

