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Naples, Marco Island, Everglades Convention and Visitors Bureau

October 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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Naples, Marco Island, Everglades: October 2011 Summary

4. A majority (**58.7%**) of October visitors flew to reach the destination (**2010: 57.0%**). Although Southwest Florida International is still the primary airport of choice, its dominance has diminished this year (**2010: 61.5%; 2011: 53.5%**). Reflecting the growth in European visitation, Miami's share of the market has increased significantly (**2010: 23.4%; 2011: 26.0%**).
5. Almost two of every five October visitors (**39.2%**) are in the Naples, Marco Island, Everglades area for the first time (**2010: 37.5%**).
6. Consumers overwhelmingly cite the Internet as the primary information source for their stay (**2011: 87.3%**). In addition to hotel (**54.7%**), destination (**27.2%**), and airline (**21.3%**) sites, fully one of every three (**34.3%**) travelers consult TripAdvisor. The social networking sites of Facebook, Twitter, and YouTube are also growing in importance.
7. This month, Collier visitors particularly enjoy:
 - World class beaches, sunning, swimming, and shelling.
 - Dining opportunities.
 - Peace and relaxation.
 - Hotel pool/spa facilities.
 - Shopping.
 - Sightseeing.
 - Sunsets.
 - Nature/Everglades.
8. The overwhelming majority (**97.0%**) of our patrons are satisfied with their current stay in the destination, with fully 90.6% planning a return trip.
9. Over the past year, Collier's visitor base has become noticeably younger. This October, the typical visitor's average age is 48.0 years. Last year's patron was, on average, 49.6 years of age. Reflecting the upscale nature of the destination's market draw, visitors' median household income has grown to \$142,466 (**2010: \$137,368**).

Naples, Marco Island, Everglades:
October 2011 Visitor Profile

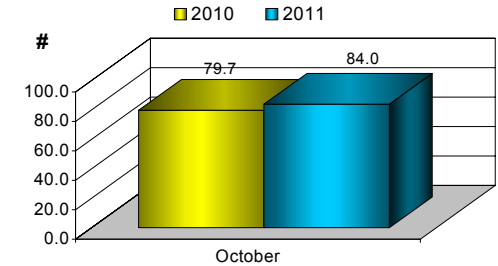


October 2011 Visitor Profile – Naples, Marco Island, Everglades

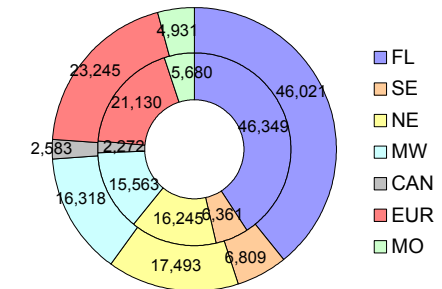
Visitor Volume	Annual 2010	Year to Date		% Δ	October		% Δ
	2010	2010	2011	'10/'11	2010	2011	'10/'11
Visitors (#)	1,383,500	1,175,900	1,249,700	+6.3	113,600	117,400	+3.3
Room Nights	2,052,310	1,739,010	1,834,900	+5.5	154,900	161,300	+4.1
Direct Exp. (\$)	\$782,078,400	\$665,561,600	\$724,884,400	+8.9	\$53,463,600	\$56,334,400	+5.4

Visitor Origin	YTD # of Visitors		% Δ	October # of Visitors				% Δ
	2010	2011	'10/'11	Rel %	2010	Rel %	2011	'10/'11
Florida	446,295	477,934	+7.1	40.8%	46,349	39.2%	46,021	-0.7
Southeast	78,087	87,871	+12.5	5.6	6,361	5.8	6,809	+7.0
Northeast	230,544	247,501	+7.4	14.3	16,245	14.9	17,493	+7.7
Midwest	183,082	190,218	+3.9	13.7	15,563	13.9	16,318	+4.9
Canada	26,842	25,712	-4.2	2.0	2,272	2.2	2,583	+13.7
Europe	150,989	160,168	+6.1	18.6	21,130	19.8	23,245	+10.0
Markets of Opp.	60,061	60,296	+0.4	5.0	5,680	4.2	4,931	-13.2
Total	1,175,900	1,249,700	+6.3	100.0	113,600	100.0	117,400	+3.3

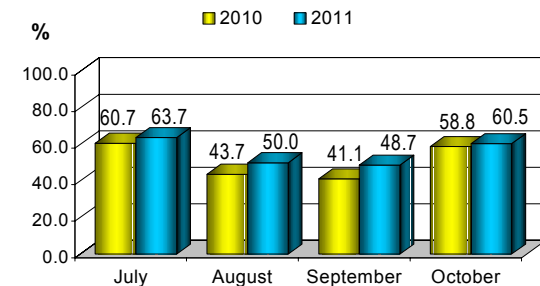
October Economic Impact (in Millions)



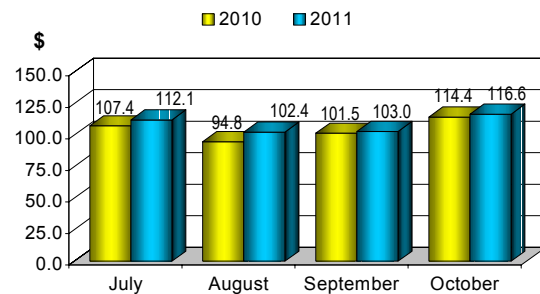
October Visitor Origins



Occupancy



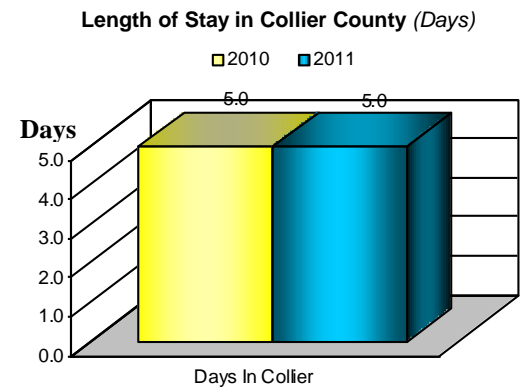
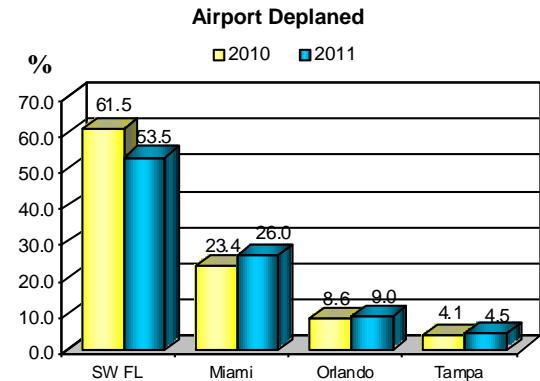
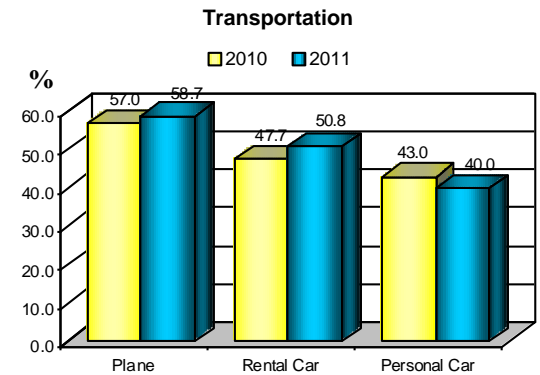
Room Rates



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	61.3	63.7	50.0	48.7	60.5		
Δ Pts. ('10/'11)	-1.6	+2.2	+5.8	+0.3	+4.2	+3.5	+3.0	+6.3	+7.6	+1.7		
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	134.2	112.1	102.4	103.0	116.6		
Δ % ('10/'11)	-2.1%	+1.4%	+2.0%	+5.9%	+2.9%	+3.6%	+4.4%	+8.0%	+1.5%	+1.9%		
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	99.8	82.3	71.4	51.2	50.2	70.5		
Δ % ('10/'11)	-4.4%	+4.1%	+9.2%	+6.2%	+9.8%	+9.9%	+9.5%	+23.7%	+20.4%	+4.8%		

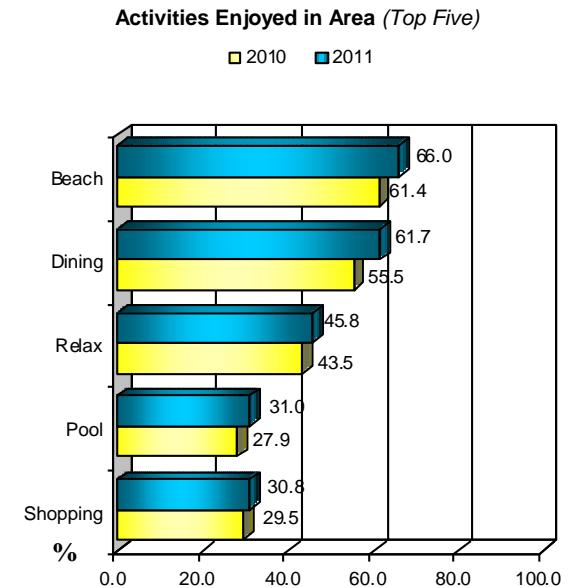
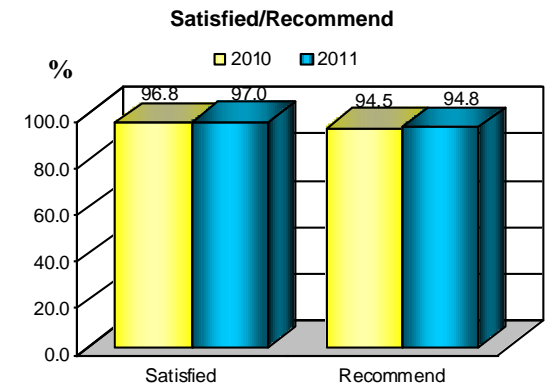
October 2011 Visitor Profile -- Naples, Marco Island, Everglades

	<u>October 2010</u>	<u>October 2011</u>
Transportation Mode <i>(Multiple Response)</i>		
Plane	57.0%	58.7%
Rental Car	47.7	50.8
Personal Car	43.0	40.0
Airport Deplaned <i>(Base: Flew)</i>		
Southwest Florida International	61.5%	53.5%
Miami International	23.4	26.0
Orlando International/Sanford	8.6	9.0
Tampa International	4.1	4.5
Purpose of Trip <i>(Multiple Response)</i>		
Vacation	68.1%	68.8%
Business Travelers	16.3	19.2
Conferences/Business Meetings	10.6	9.4
Visit with Friends and Relatives	7.1	8.4
First Visit to Collier County (% Yes)	37.5%	39.2%
First Visit to Florida (% Yes)	6.4%	6.3%
Length of Stay in Collier County (# of days)	5.0 days	5.0 days
Party Size (# of People)	2.3 people	2.3 people
Party Composition <i>(Multiple Response)</i>		
Couple	56.3%	57.2%
Family	31.5	28.8
Group of Friends	7.7	6.2
Single	6.7	5.7



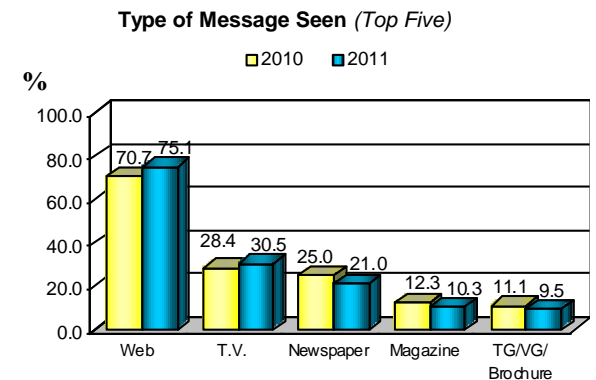
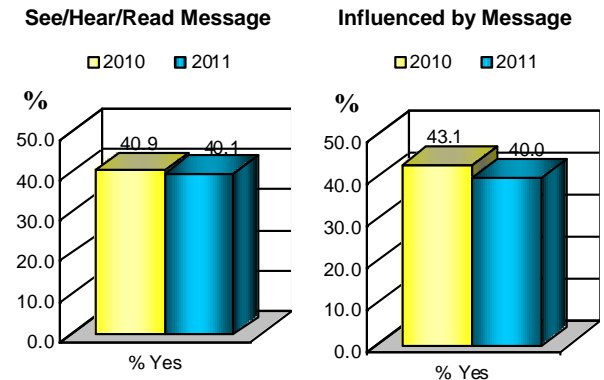
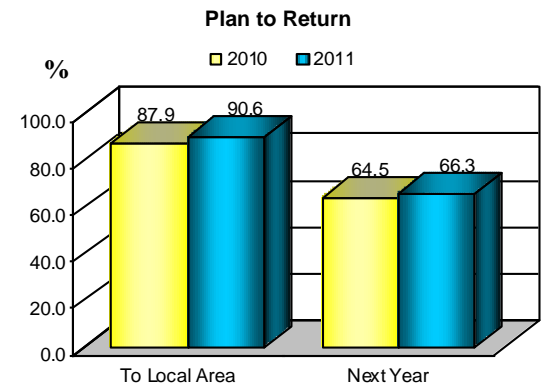
October 2011 Visitor Profile -- Naples, Marco Island, Everglades

	<u>October 2010</u>	<u>October 2011</u>
Satisfaction with Collier County		
Very Satisfied	86.5%	88.0%
Satisfied	10.3	9.0
Satisfaction Level (<i>Very Satisfied + Satisfied</i>)	96.8%	97.0%
Recommend Collier to Friends/Relatives		
Yes	94.5%	94.8%
Activities Enjoyed in Area (<i>Multiple Response</i>)		
Beach	61.4%	66.0%
Dining Out	55.5	61.7
Relaxing	43.5	45.8
Pool	27.9	31.0
Shopping	29.5	30.8
Sunning	18.3	24.8
Sightseeing	18.8	21.8
Swimming	16.6	19.8
Sunsets	14.1	19.7
Enjoying Nature/Bird Watching/Everglades	14.3	19.6
Reading	11.0	16.4
Visiting with Friends/Relatives	11.6	12.8
Walking	9.7	11.1
Shelling	8.4	9.9
Golfing	10.5	8.7
Why Chose the Area (2011) (<i>Multiple Response</i>)		
Beach Area		58.9%
Relaxing		46.3
Quiet/Peaceful/Laid Back		44.9
Weather		43.6
Previous Experience		38.8
Not Crowded		31.8
Quality of Hotel/Accommodations		31.1
Business/Meeting/Conference		25.4
Appealing Brochures/Websites		24.8
Recommendation		23.6
Outdoor Recreation/Nature		23.1
Restaurants		22.3
Never Been/Wanted to Try Something New		21.4
Proximate Location		20.0



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

	<u>October 2010</u>	<u>October 2011</u>
Expense Relative to Expectations		
More Expensive	7.8%	9.5%
Less Expensive	3.4	1.6
As Expected	80.0	78.4
Don't Know	8.8	10.5
Plan to Return (% Yes)		
To Local Area	87.9%	90.6%
Next Year (Base: Return to Local Area)	64.5	66.3
Collier Base Budget		
Total	\$1,082.45	\$1,103.66
Per Person/Day	470.63	479.85
Per Person/Trip	94.13	95.97
Avg. Party Budget Breakdown		
Accommodations	\$462.23	\$475.68
Food/Entertainment	486.95	496.89
Retail	118.76	123.51
Average Age Head of Household (Years)		
	49.6	48.0
Median Annual Household Income		
	\$137,368	\$142,466
See/Read/Hear Collier Message (% Yes)		
	40.9%	40.1%
Type of Message Seen (Multiple Response)		
Internet	70.7%	75.1%
Television	28.4	30.5
Newspaper	25.0	21.0
Magazine	12.3	10.3
Travel Guides/Visitor Guides/Brochures	11.1	9.5
Influenced by Collier Message		
(Base: Respondents Reporting See/Read/Hear Message)	43.1%	40.0%

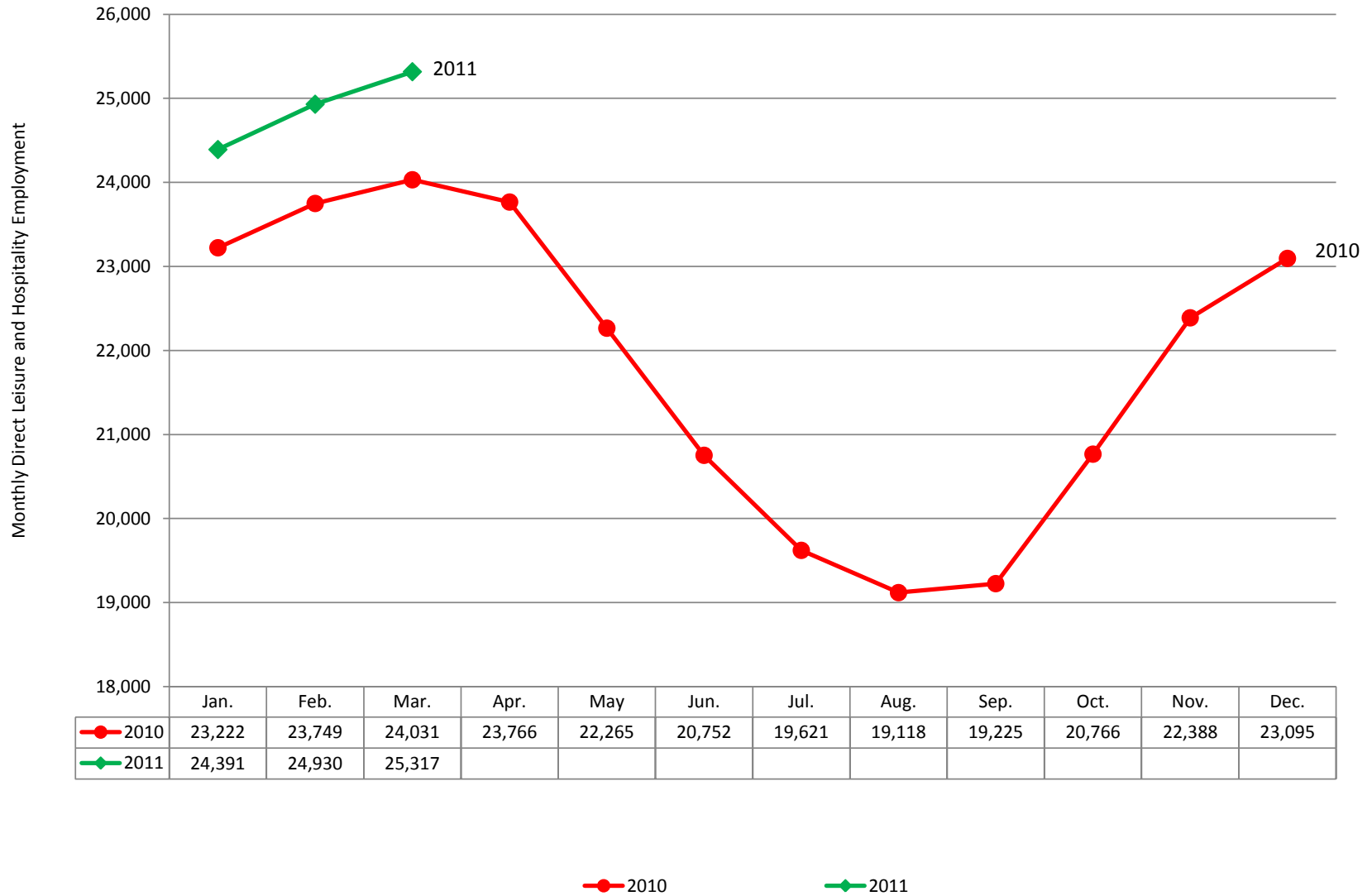


Employment Data: 2009 – 2011



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

Collier Direct Leisure and Hospitality Employment *



* Source: Florida Department of Economic Opportunity, Labor Market Information, Quarterly Census of Employment and Wages Program (QCEW), Collier County Leisure and Hospitality Sector. 2011 First Quarter Data Released October 2011.