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Naples, Marco Island, Everglades Convention and Visitors Bureau

November 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: November 2011

- This November, a record 118,200 visitors stayed in Collier County's overnight accommodations (+16.1%), with visitor spending generating \$91.3 million of economic impact for the County (+21.4%). The positive impact of November tourist activity is replayed by the industry's performance. Specifically:

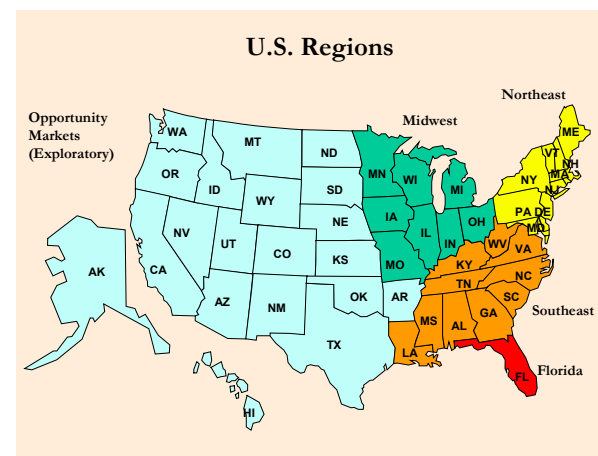
<u>Statistics</u>	<u>2010</u>	<u>2011</u>	<u>% Δ</u>
Occupancy	60.6%	68.3%	+12.7%
ADR	\$121.7	\$126.5	+3.9%
RevPAR	\$73.8	\$86.4	+17.1%

- Importantly, managements' three month forward-looking reservation perspective shows positive trending:

<u>% of Properties Reporting Reservations:</u>	<u>2009</u>	<u>2010</u>	<u>2011</u>
Up	11.8%	15.0%	53.1%
The Same	26.5	35.0	25.0
Down	52.9	45.0	15.6

- All of Collier's key origin segments showed significant growth this November:

<u>Nov. Visitation</u>	<u>2010 Visitor #</u>	<u>2011 Visitor #</u>	<u>% Δ</u>
Florida	41,535	46,216	+11.3
Southeast	6,922	8,392	+21.2
Northeast	9,467	12,766	+34.8
Midwest	16,186	19,267	+19.0
Canada	3,563	4,019	+12.8
Europe	19,342	23,640	+22.2
Mkts. of Opp.	4,785	3,900	-18.5
Total	101,800	118,200	+16.1



Naples, Marco Island, Everglades: November 2011 Summary

4. A majority (**58.2%**) of November visitors flew to reach the destination (**2010: 56.3%**). Southwest Florida International remains the primary airport of choice (**2010: 55.3%; 2011: 53.6%**). However, reflecting the growth in European visitation, Miami's share of the fly market has increased (**2010: 27.3%; 2011: 29.2%**).
5. Better than two of every five November visitors (**42.8%**) are for the first time in the destination, a significant increase over last November (**2010: 36.3%**).
6. Fully 84.4% of visitors cite the Internet as their primary information source. In addition to hotel (**51.9%**), destination (**26.8%**), and airline (**20.6%**) sites, more than one of every three (**33.4%**) travelers rely on TripAdvisor information. The social networking sites of Facebook, Twitter, and YouTube are also growing in importance.
7. This month, Collier visitors particularly enjoy the destination's:
 - World class beaches.
 - Dining opportunities.
 - Peace and relaxation.
 - Shopping.
 - Sunning.
 - Sunsets.
 - Sightseeing.
 - Hotel pool/spa facilities.
 - Nature/Everglades.
 - Walking.
 - Swimming.
8. The overwhelming majority (**95.5%**) of our patrons are satisfied with their stay in the destination. Fully 87.7% plan a return trip.
9. This November visitors' average age is younger (**2010: 47.9 years; 2011: 47.4 years**). Visitors' median household income is \$162,991.

Naples, Marco Island, Everglades:
November 2011 Visitor Profile



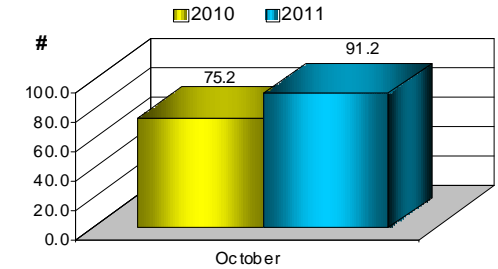
November 2011 Visitor Profile – Naples, Marco Island, Everglades

Visitor Volume	Annual 2010	Year to Date		% Δ '10/'11	November		% Δ '10/'11
		2010	2011		2010	2011	
Visitors (#)	1,383,500	1,277,700	1,367,900	+7.1	101,800	118,200	+16.1
Room Nights	2,052,310	1,895,310	2,012,100	+6.2	156,300	177,200	+13.4
Direct Exp. (\$)	\$782,078,400	\$715,986,200	\$786,084,800	+9.8	\$50,424,600	\$61,200,400	+21.4

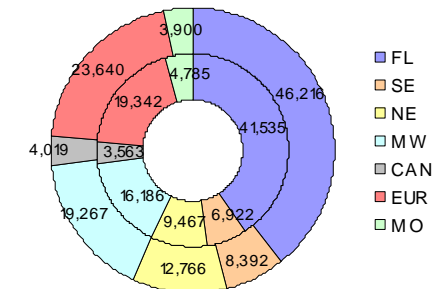
Visitor Origin	YTD # of Visitors			% Δ '10/'11	November # of Visitors			
	2010	2011	Rel %		2010	Rel %	2011	% Δ '10/'11
Florida	487,830	524,150	+7.4	40.8%	41,535	39.1%	46,216	+11.3
Southeast	85,009	96,263	+13.2	6.8	6,922	7.1	8,392	+21.2
Northeast	240,011	260,267	+8.4	9.3	9,467	10.8	12,766	+34.8
Midwest	199,268	209,485	+5.1	15.9	16,186	16.3	19,267	+19.0
Canada	30,405	29,731	-2.2	3.5	3,563	3.4	4,019	+12.8
Europe	170,331	183,808	+7.9	19.0	19,342	20.0	23,640	+22.2
Markets of Opp.	64,846	64,196	-1.0	4.7	4,785	3.3	3,900	-18.5
Total	1,277,700	1,367,900	+7.1	100.0	101,800	100.0	118,200	+16.1

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	68.3	
Δ Pts. ('10/'11)	-1.6	+2.2	+5.8	+0.3	+4.2	+3.5	+3.0	+6.3	+7.6	+1.7	+7.7	
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	126.5	
Δ % ('10/'11)	-2.1%	+1.4%	+2.0%	+5.9%	+2.9%	+3.6%	+4.4%	+8.0%	+1.5%	+1.9%	+3.9%	
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	86.4	
Δ % ('10/'11)	-4.4%	+4.1%	+9.2%	+6.2%	+9.8%	+9.9%	+9.5%	+23.7%	+20.4%	+4.8%	+17.1%	

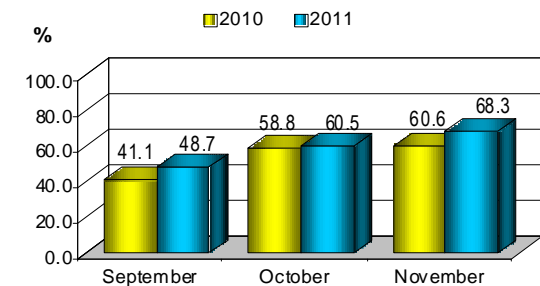
November Economic Impact (in Millions)



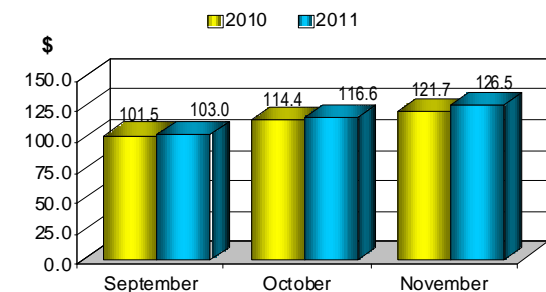
November Visitor Origins



Occupancy

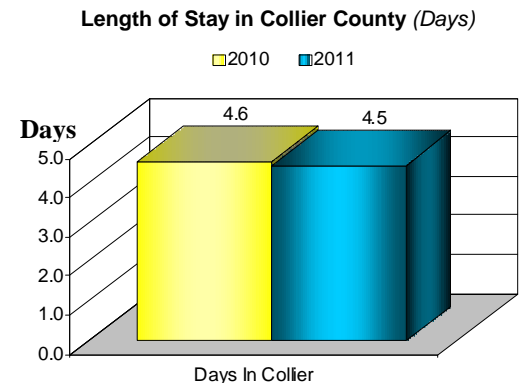
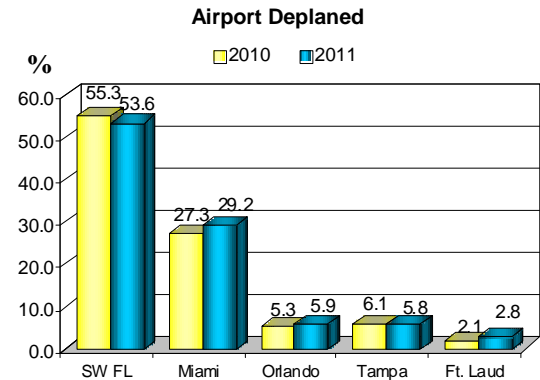
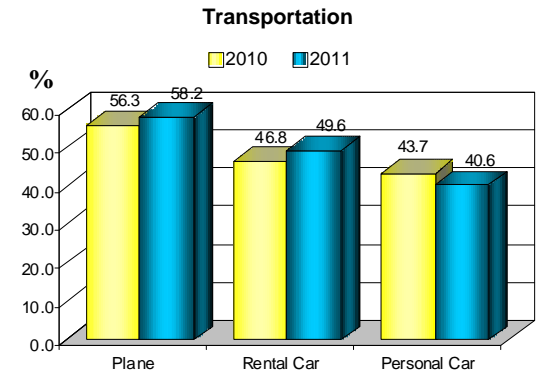


Room Rates



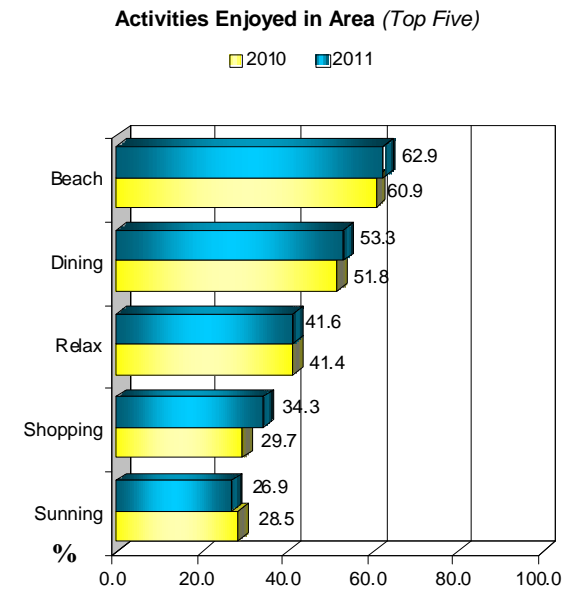
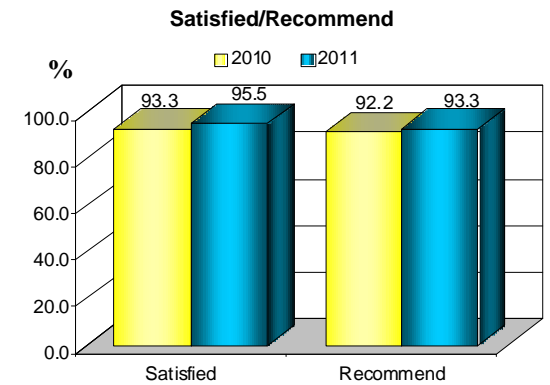
November 2011 Visitor Profile -- Naples, Marco Island, Everglades

	<u>November 2010</u>	<u>November 2011</u>
Transportation Mode <i>(Multiple Response)</i>		
Plane	56.3%	58.2%
Rental Car	46.8	49.6
Personal Car	43.7	40.6
Airport Deplaned <i>(Base: Flew)</i>		
Southwest Florida International	55.3%	53.6%
Miami International	27.3	29.2
Orlando International/Sanford	5.3	5.9
Tampa International	6.1	5.8
Ft. Lauderdale International	2.1	2.8
Purpose of Trip <i>(Multiple Response)</i>		
Vacation/Weekend Getaway	63.1%	61.3%
Conferences/Business Meetings	17.2	22.8
Business Travelers	18.8	15.9
Visit with Friends and Relatives	10.6	13.4
Special Events	10.5	8.8
First Visit to Collier County (% Yes)	36.3%	42.8%
First Visit to Florida (% Yes)	8.7%	5.2%
Length of Stay in Collier County (# of days)	4.6 days	4.5 days
Party Size (# of People)	2.3 people	2.3 people
Party Composition <i>(Multiple Response)</i>		
Couple	54.4%	57.1%
Family	26.9	28.7
Business Associates	7.7	8.3
Group of Couples	4.1	5.6
Single	7.1	5.5
Group of Friends	6.2	5.0



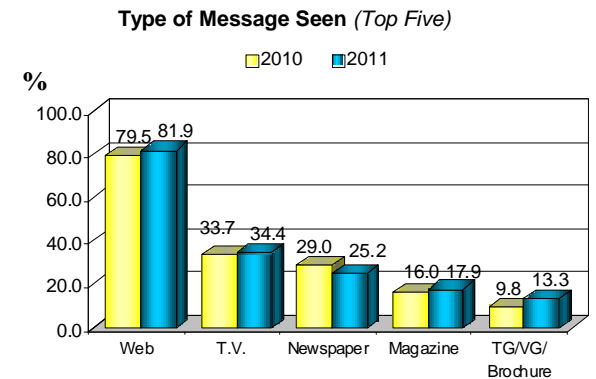
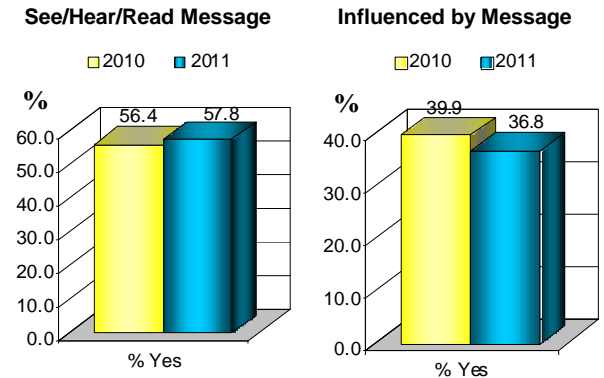
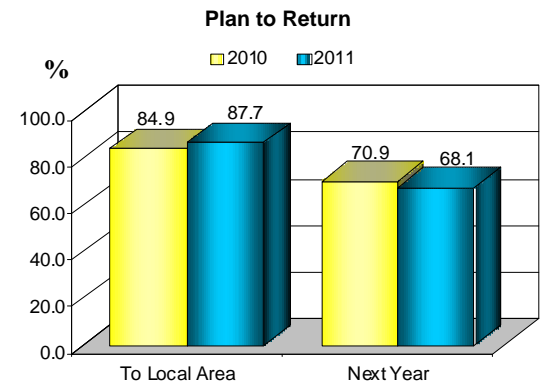
November 2011 Visitor Profile -- Naples, Marco Island, Everglades

	<u>November 2010</u>	<u>November 2011</u>
Satisfaction with Collier County		
Very Satisfied	80.8%	79.5%
Satisfied	<u>12.5</u>	<u>16.0</u>
Satisfaction Level (<i>Very Satisfied + Satisfied</i>)	93.3%	95.5%
Recommend Collier to Friends/Relatives		
Yes	92.2%	93.3%
Activities Enjoyed in Area (<i>Multiple Response</i>)		
Beach	60.9%	62.9%
Dining Out	51.8	53.3
Relaxing	41.4	41.6
Shopping	29.7	34.3
Sunning	28.5	26.9
Sunsets	25.0	26.4
Sightseeing	22.3	22.9
Pool	21.2	19.2
Enjoying Nature/Bird Watching/Everglades	13.6	18.1
Walking	13.7	17.1
Swimming	12.8	17.0
Visiting with Friends/Relatives	11.3	15.3
Bars/Nightlife	14.0	14.8
Reading	10.8	12.9
Why Chose the Area (2011) (<i>Multiple Response</i>)		
Weather		54.0%
Beach Area		50.3
Relaxing		44.1
Quiet/Peaceful/Laid Back		39.4
Quality of Hotel/Accommodations		36.9
Not Crowded		35.3
Business/Meeting/Conference		34.0
Previous Experience		30.1
Outdoor Recreation/Nature		27.3
Never Been/Wanted to Try Something New		25.4
Recommendation		25.3
Appealing Brochures/Websites		20.1
Shopping		18.8
Restaurants		18.5



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

	<u>November 2010</u>	<u>November 2011</u>
Expense Relative to Expectations		
More Expensive	6.1%	10.7%
Less Expensive	3.5	2.4
As Expected	81.5	78.8
Don't Know	8.8	8.1
Plan to Return (% Yes)		
To Local Area	84.9%	87.7%
Next Year (Base: Return to Local Area)	70.9	68.1
Collier Base Budget		
Total	\$1,139.25	\$1,190.87
Per Person/Day	495.33	517.77
Per Person/Trip	107.68	115.06
Avg. Party Budget Breakdown		
Accommodations	\$510.89	\$538.57
Food/Entertainment	486.31	505.33
Retail	129.34	134.74
Average Age Head of Household (Years)		
	47.9	47.4
Median Annual Household Income		
	\$168,566	\$162,991
See/Read/Hear Collier Message (% Yes)		
	56.4%	57.8%
Type of Message Seen (Multiple Response)		
Internet	79.5%	81.9%
Television	33.7	34.4
Newspaper	29.0	25.2
Magazine	16.0	17.9
Travel Guides/Visitor Guides/Brochures	9.8	13.3
Influenced by Collier Message		
(Base: Respondents Reporting See/Read/Hear Message)	39.9%	36.8%

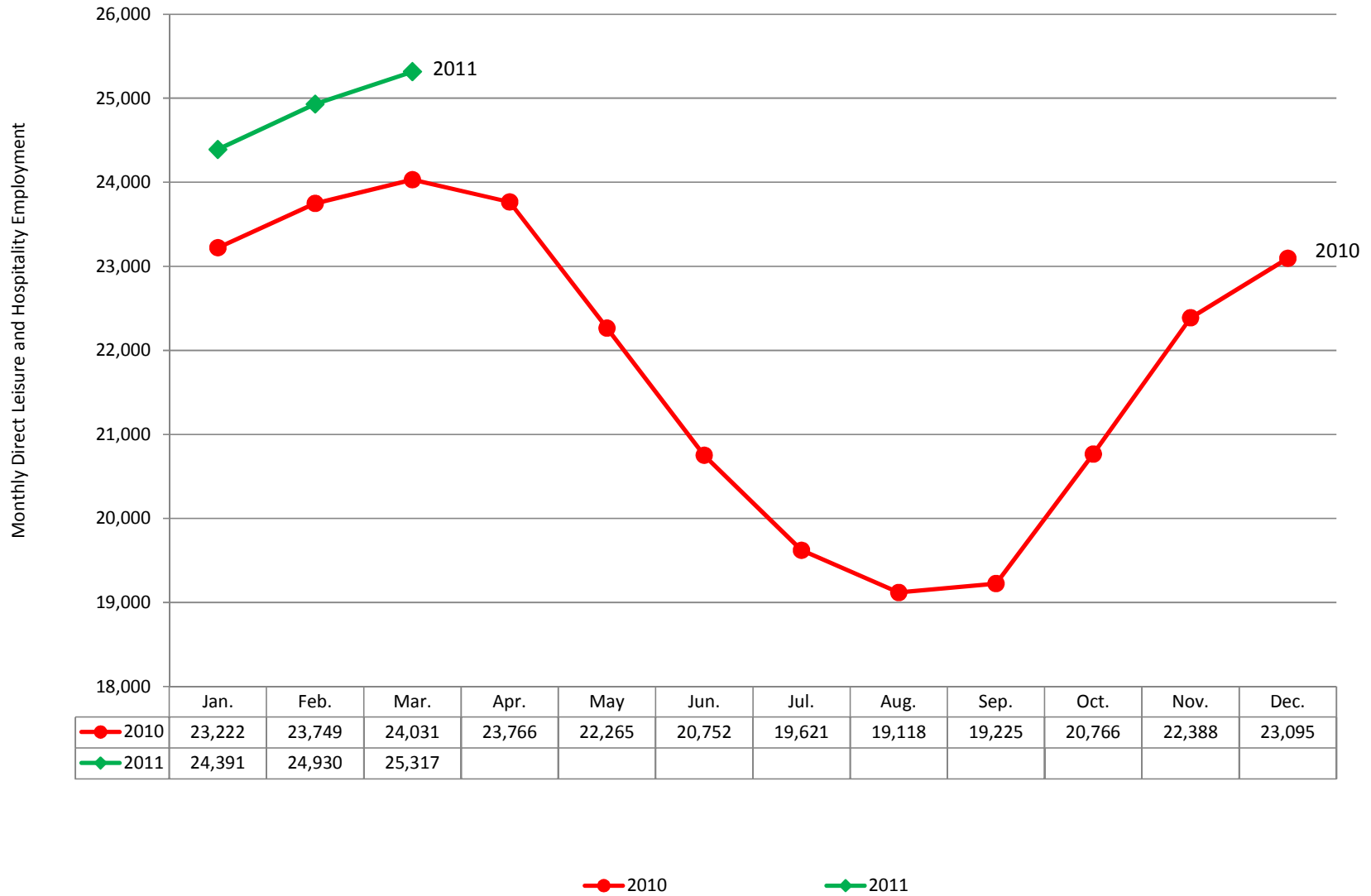


Employment Data: 2009 – 2011



November 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.