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Naples, Marco Island, Everglades Convention and Visitors Bureau

February 2011 Visitor Profile



Prepared for:

Collier County Board of County Commissioners

and

Naples, Marco Island, Everglades Convention and Visitors Bureau

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Naples, Marco Island, Everglades:
February 2011 Visitor Profile



February 2011 Visitor Profile – Naples, Marco Island, Everglades

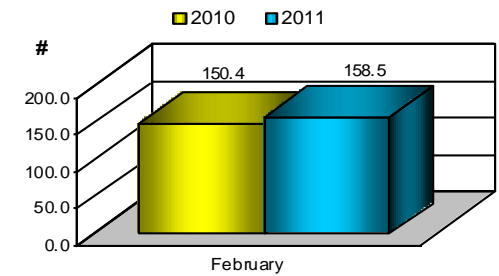
Visitor Volume	Calendar Year	Year to Date		% Δ '10/'11	February		% Δ '10/'11
	2010	2010	2011		2010	2011	
Visitors (#)	1,383,500	304,500	308,700	+1.4	155,200	161,900	+4.3
Room Nights	2,052,310	419,560	420,800	+0.3	219,300	225,300	+2.7
Econ. Impact *	\$1,166,078,894	\$256,820,724	\$262,260,340	+2.1	\$150,416,106	\$158,546,827	+5.4

Visitor Origin	YTD # of Visitors			% Δ '10/'11	Rel %	February # of Visitors			% Δ '10/'11
	2010	2011				2010	Rel %	2011	
Florida	76,975	83,291		+8.2	21.7%	33,678	23.7%	38,370	+13.9
Southeast	18,701	20,961		+12.1	5.7	8,847	6.6	10,685	+20.8
Northeast	89,953	92,761		+3.1	29.1	45,163	31.0	50,189	+11.1
Midwest	62,010	60,464		-2.5	21.1	32,747	20.3	32,866	+0.4
Canada	10,735	8,000		-25.5	4.8	7,450	3.4	5,505	-26.1
Europe	32,090	30,182		-5.9	12.5	19,400	10.3	16,676	-14.0
Markets of Opp.	14,036	13,041		-7.1	5.1	7,915	4.7	7,609	-3.9
Total	304,500	308,700		+1.4	100.0	155,200	100.0	161,900	+4.3

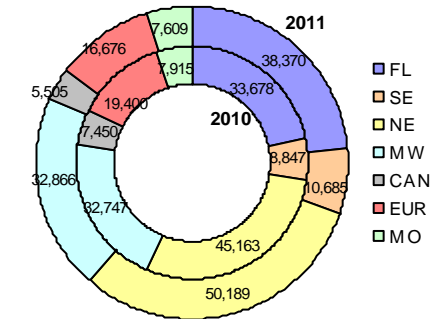
Occupancy	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
Occ. 2009	61.2%	78.3%	80.3%	70.6%	60.9%	55.9%	63.6%	45.7%	41.9%	51.8%	59.3%	60.4%
Occ. 2010	68.0	81.6	83.3	75.8	62.3	57.8	60.7	43.7	41.1	58.8	60.6	58.9
Occ. 2011	66.4	83.8										
Δ % ('10/'11)	-2.4%	+2.7%										
ADR 2009	\$175.9	\$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										
Δ % ('10/'11)	-2.1%	+1.4%										
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										
Δ % ('10/'11)	-4.4%	+4.1%										

* Based on Minnesota Implan Multipliers.

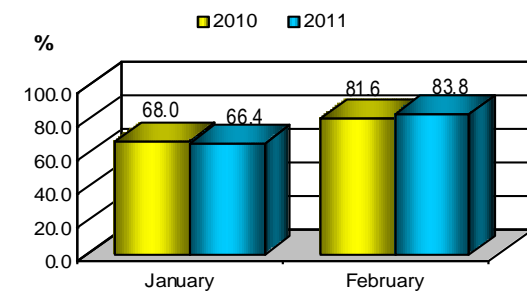
February Economic Impact (in Millions)



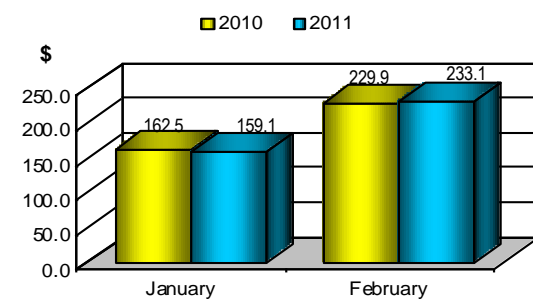
February 2011 Visitor Origins



Occupancy

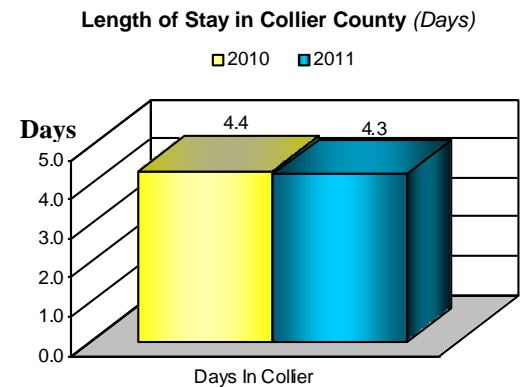
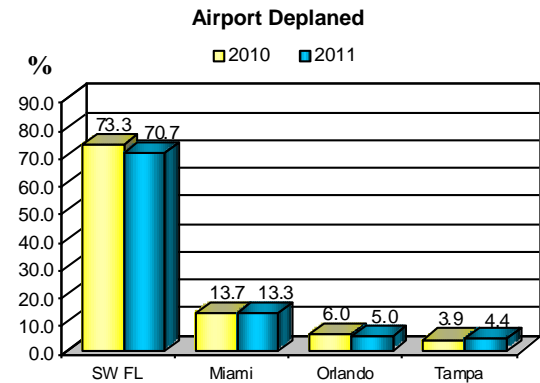
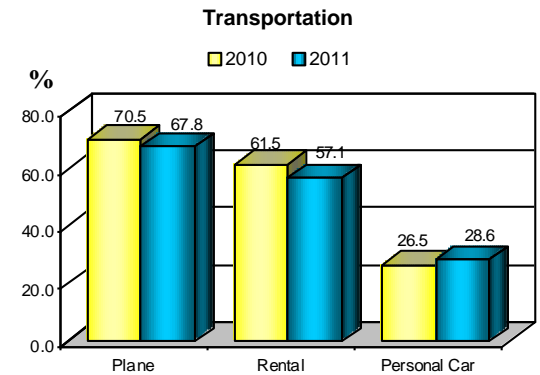


Room Rates



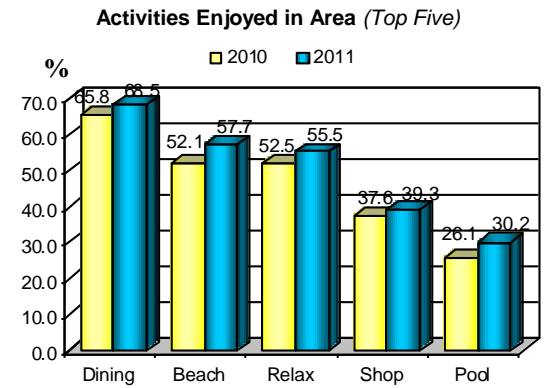
February 2011 Visitor Profile -- Naples, Marco Island, Everglades

	<u>February 2010</u>	<u>February 2011</u>
Transportation Mode <i>(Multiple Response)</i>		
Plane	70.5%	67.8%
Rental Car	61.5	57.1
Personal Car	26.5	28.6
Airport Deplaned <i>(Base: Flew)</i>		
Southwest Florida International	73.3%	70.7%
Miami International	13.7	13.3
Orlando International/Sanford	6.0	5.0
Tampa International	3.9	4.4
Purpose of Trip <i>(Multiple Response)</i>		
Vacation/Getaway	77.6%	78.7%
Business Travelers/Conferences/Business Meetings	24.0	25.6
Visit with Friends and Relatives	12.0	14.3
First Visit to Collier County (% Yes)	35.8%	34.6%
First Visit to Florida (% Yes)	7.2%	5.4%
Length of Stay in Collier County (# of days)	4.4 days	4.3 days
Party Size (# of People)	2.2 people	2.3 people
Satisfaction with Collier County		
Very Satisfied	85.5%	83.2%
Satisfied	<u>7.8</u>	<u>12.8</u>
Satisfaction Level <i>(Very Satisfied + Satisfied)</i>	93.3%	96.0%
Recommend Collier to Friends/Relatives		
Yes	89.2%	90.3%
Expense Relative to Expectations		
More Expensive	10.8%	16.2%
Less Expensive	3.0	0.8
As Expected	80.7	79.0
Don't Know	5.4	4.0
Plan to Return (% Yes)		
To Local Area	90.6%	91.1%
Next Year <i>(Base: Return to Local Area)</i>	57.5	63.3

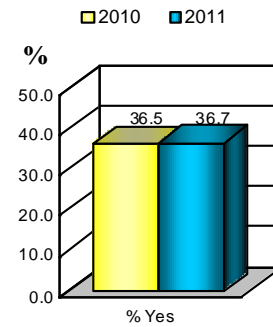


February 2011 Visitor Profile -- Naples, Marco Island, Everglades

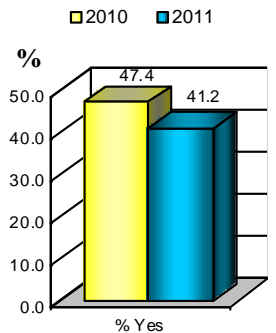
	February 2010	February 2011
Activities Enjoyed in Area (Multiple Response)		
Dining Out	65.8%	68.5%
Beach	52.1	57.7
Relaxing	52.5	55.5
Shopping	37.6	39.3
Pool	26.1	30.2
Walking	19.5	23.9
Sunning	17.3	20.7
Visit with Friends/Relatives	16.3	19.9
Sightseeing	16.2	17.8
Sunsets	N/A	17.1
Reading	13.1	14.6
Everglades Adventures/Nature	12.8	13.8
Golfing	13.8	13.1
Bars/Nightlife	11.5	11.4
Swimming	11.4	10.6
Art Galleries	N/A	9.8
Average Age Head of Household (Years)		
	51.8	52.3
Median Annual Household Income		
	\$174,377	\$165,507
See/Read/Hear Collier Message (% Yes)		
	36.5%	36.7%
Type of Message Seen (Multiple Response)		
Internet	76.0%	80.0%
Television	18.6	26.5
Travel Guides/Visitor Guides/Brochures	26.3	25.0
Newspaper	30.4	24.2
Magazine	10.5	7.9
Influenced by Collier Message		
(Base: Respondents Reporting See/Read/Hear Message)	47.4%	41.2%
Collier Base Budget		
Total	\$1,430.04	\$1,510.64
Per Person/Day	650.02	656.80
Per Person/Trip	147.73	152.74
Avg. Party Budget Breakdown		
Accommodations	\$758.39	\$762.60
Food/Entertainment	526.10	564.40
Retail	140.48	177.86



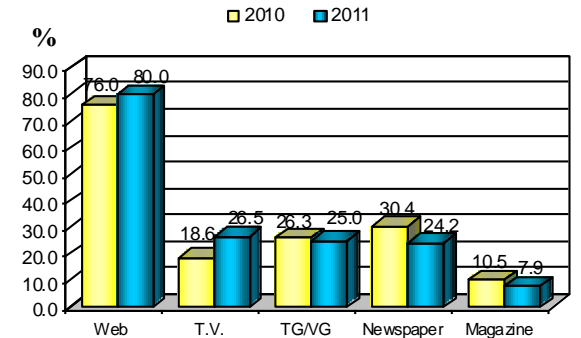
See/Hear/Read Message



Influenced by Message



Type of Message Seen



Visitors describe the Naples, Marco Island, Everglades area as follows:

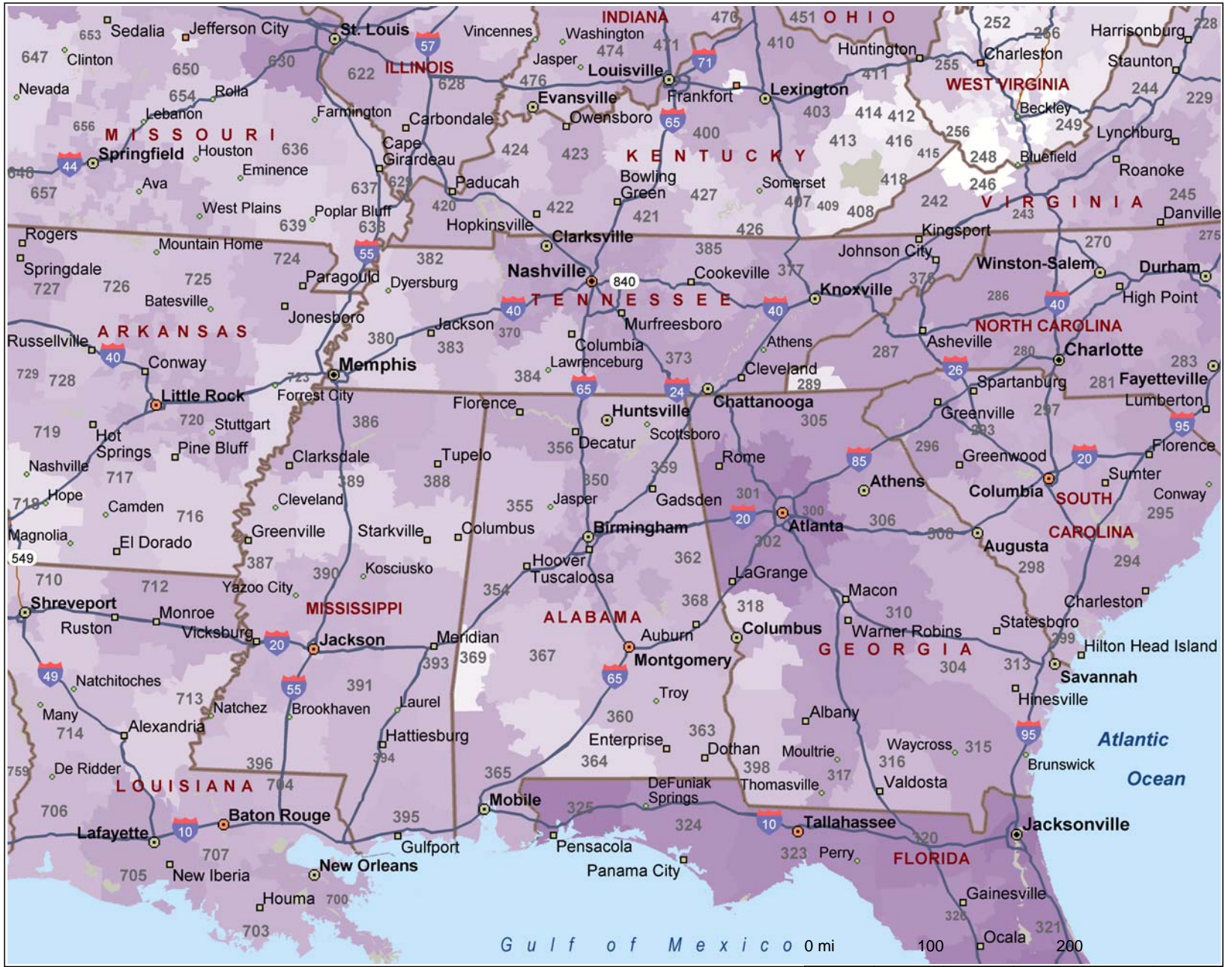
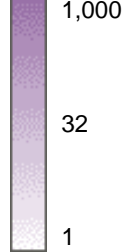
- ❖ A bit snobby with old money.
- ❖ A cut above the rest of Florida.
- ❖ Affluent.
- ❖ Awesome, would be great to retire to.
- ❖ Bad traffic.
- ❖ Beautiful beaches, lots of senior citizens.
- ❖ Beautiful, relaxing, fun, good shopping.
- ❖ Best area in Florida for families.
- ❖ Busy traffic.
- ❖ Calm, convenient.
- ❖ Charming.
- ❖ Civilized, truly paradise.
- ❖ Clean, beautifully organized.
- ❖ Clean, easy to get around.
- ❖ Clean, slow-paced, relaxing.
- ❖ Couldn't be better.
- ❖ Delightful.
- ❖ Densely populated, few public areas, lots of activity and amenities.
- ❖ Didn't like Florida until we came to Naples.
- ❖ Distinctive.
- ❖ Enchanting, gorgeous, good mix of new and old.
- ❖ Extraordinarily clean, easy access, friendly, courteous service.
- ❖ Eye-pleasing.
- ❖ Fantastic.
- ❖ Friendly, laid back.
- ❖ Fun, got it all.
- ❖ Glorious.
- ❖ Gorgeous weather.
- ❖ Great dining, nice visitors and friendly locals.
- ❖ Great place to chill.
- ❖ Great weather, convenient.
- ❖ Heaven.
- ❖ Home away from home.
- ❖ Just cosmopolitan enough.
- ❖ Just perfect.
- ❖ Like it here.
- ❖ Liked it better years ago.
- ❖ Looks lovely.
- ❖ Love it; favorite place.
- ❖ Lovely area, great beach.
- ❖ Lovely.
- ❖ Luxurious, relaxing.
- ❖ More congested.
- ❖ Neat.
- ❖ Nice flowers.
- ❖ Nice mix of recreation, don't feel stuck in resort.
- ❖ Nice place to visit, casual.
- ❖ Nice scenery.
- ❖ Nicely manicured, beautiful.
- ❖ No riff-raff.
- ❖ No snow.
- ❖ Not as elderly as remembered, lovely in every way.
- ❖ Older population.
- ❖ One of the best looking places in the country.
- ❖ One of the nicest parts of Florida.
- ❖ Paradise found.
- ❖ Peaceful.
- ❖ Perfect escape.
- ❖ Pleasant, warm.
- ❖ Pretty, nice beach.
- ❖ Relaxed.
- ❖ Relaxing haven.
- ❖ Resort-y.
- ❖ Sheer perfection.
- ❖ Slice of heaven.
- ❖ Something for everyone.
- ❖ Sophisticated.
- ❖ Splendid, classy.
- ❖ Too built up, too many people, cars, noise.
- ❖ Tropical.
- ❖ Upscale community.
- ❖ Very enjoyable.
- ❖ Very nice.
- ❖ Very relaxing.
- ❖ Walkable.
- ❖ Wealthy.
- ❖ Weather is a 10.
- ❖ Welcoming, relaxing.
- ❖ Well maintained.
- ❖ Wonderful.
- ❖ Would love to come here every year.

Naples, Marco Island, Everglades: *2010 Origin Cluster Mapping*



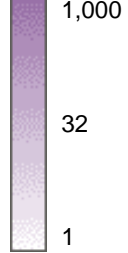
Collier 2010 Tourism - Southeast Clusters

Collier 2010 Tourism by
3 Digit ZIP Code



Collier 2010 Tourism - Northeast Clusters

Collier 2010 Tourism by
3 Digit ZIP Code



Collier 2010 Tourism - Midwest Clusters

Collier 2010 Tourism by 3 Digit ZIP Code

