

# RESEARCH DATA SERVICES, INC.

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

### February 2010 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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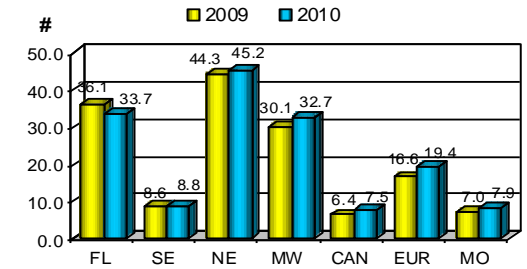
## February 2010 Visitor Profile – Naples, Marco Island, Everglades

| Visitor Volume   | Annual 2009   | Year to Date  |               | % Δ '09/'10 | February      |               | % Δ '09/'10 |
|------------------|---------------|---------------|---------------|-------------|---------------|---------------|-------------|
|                  |               | 2009          | 2010          |             | 2009          | 2010          |             |
| Visitors (#)     | 1,338,800     | 287,300       | 304,500       | +6.0        | 149,100       | 155,200       | +4.1        |
| Room Nights      | 1,985,930     | 388,480       | 419,560       | +8.0        | 208,280       | 219,300       | +5.3        |
| Direct Exp. (\$) | \$756,482,900 | \$168,128,800 | \$172,247,300 | +2.4        | \$100,023,200 | \$100,882,700 | +0.9        |

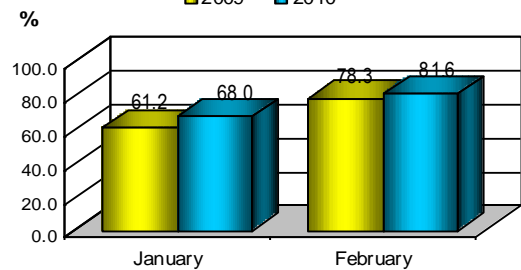
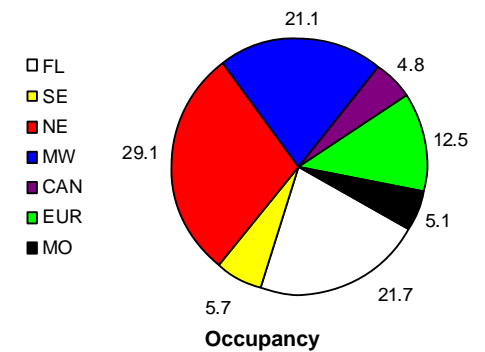
| Visitor Origin  | YTD # of Visitors |                |             | Rel %        | February # of Visitors |                |             | % Δ '09/'10 |
|-----------------|-------------------|----------------|-------------|--------------|------------------------|----------------|-------------|-------------|
|                 | 2009              | 2010           | '09/'10     |              | 2009                   | 2010           | '09/'10     |             |
| Florida         | 77,404            | 76,975         | -0.6        | 24.2%        | 36,082                 | 33,678         | -6.7        |             |
| Southeast       | 16,802            | 18,701         | +11.3       | 5.8          | 8,648                  | 8,847          | +2.3        |             |
| Northeast       | 83,117            | 89,953         | +8.2        | 29.7         | 44,283                 | 45,163         | +2.0        |             |
| Midwest         | 57,896            | 62,010         | +7.1        | 20.2         | 30,118                 | 32,747         | +8.7        |             |
| Canada          | 10,419            | 10,735         | +3.0        | 4.3          | 6,411                  | 7,450          | +16.2       |             |
| Europe          | 30,370            | 32,090         | +5.7        | 11.1         | 16,550                 | 19,400         | +17.2       |             |
| Markets of Opp. | 11,292            | 14,036         | +24.3       | 4.7          | 7,008                  | 7,915          | +12.9       |             |
| <b>Total</b>    | <b>287,300</b>    | <b>304,500</b> | <b>+6.0</b> | <b>100.0</b> | <b>149,100</b>         | <b>155,200</b> | <b>+4.1</b> |             |

| Occupancy               | Jan.         | Feb.         | Mar.    | Apr.    | May     | Jun.    | Jul.    | Aug.    | Sep.    | Oct.    | Nov.    | Dec.    |
|-------------------------|--------------|--------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| Occ. 2008               | 67.4%        | 86.0%        | 84.6%   | 75.4%   | 68.9%   | 63.6%   | 66.3%   | 50.6%   | 39.2%   | 55.8%   | 62.1%   | 62.3%   |
| 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         |         |         |         |         |         |         |         |         |         |         |
| <b>Δ Pts. ('09/'10)</b> | <b>+6.8</b>  | <b>+3.3</b>  |         |         |         |         |         |         |         |         |         |         |
| ADR 2008                | \$190.2      | \$266.0      | \$290.1 | \$232.8 | \$168.7 | \$139.9 | \$118.6 | \$110.0 | \$104.6 | \$117.8 | \$125.7 | \$160.6 |
| 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        |         |         |         |         |         |         |         |         |         |         |
| <b>Δ % ('09/'10)</b>    | <b>-7.6%</b> | <b>-7.9%</b> |         |         |         |         |         |         |         |         |         |         |
| RevPAR 2008             | \$128.2      | \$228.8      | \$245.4 | \$175.5 | \$116.2 | \$89.0  | \$78.6  | \$55.7  | \$41.0  | \$65.7  | \$78.1  | \$100.1 |
| 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        |         |         |         |         |         |         |         |         |         |         |
| <b>Δ % ('09/'10)</b>    | <b>+2.6%</b> | <b>-4.0%</b> |         |         |         |         |         |         |         |         |         |         |

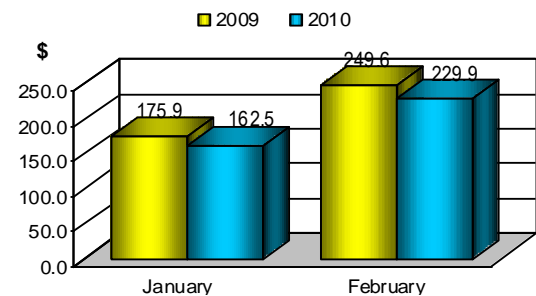
February Visitor Origins (in Thousands)



February 2010 Visitor Origins (%)

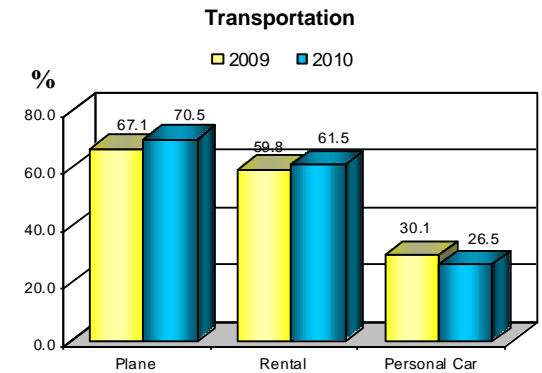


Room Rates

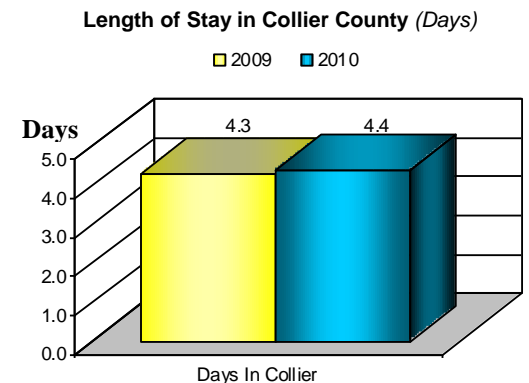
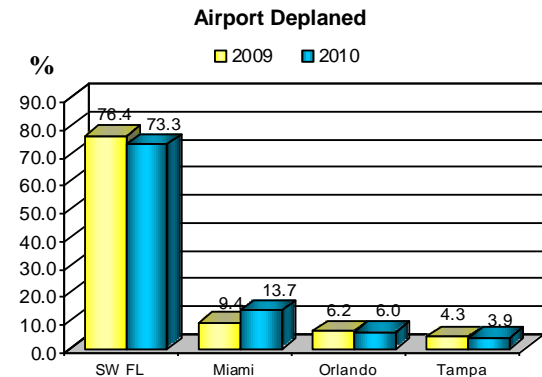


## February 2010 Visitor Profile -- Naples, Marco Island, Everglades

|  | <u>February 2009</u> | <u>February 2010</u> |
|--|----------------------|----------------------|
| <b>Transportation Mode</b><br><i>(Multiple Response)</i> |                      |                      |
| Plane  | 67.1%                | 70.5%                |
| Rental Car   | 59.8                 | 61.5                 |
| Personal Car   | 30.1                 | 26.5                 |
| <b>Airport Deplaned</b> <i>(Base: Flew)</i>              |                      |                      |
| Southwest Florida International                          | 76.4%                | 73.3%                |
| Miami International                                      | 9.4                  | 13.7                 |
| Orlando International/Sanford                            | 6.2                  | 6.0                  |
| Tampa International                                      | 4.3                  | 3.9                  |

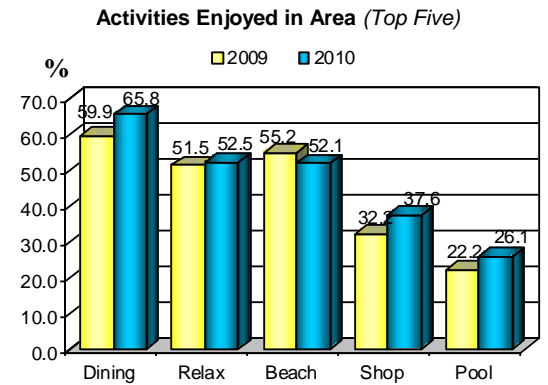


|   | <u>February 2009</u> | <u>February 2010</u> |
|---|----------------------|----------------------|
| <b>Purpose of Trip</b> <i>(Multiple Response)</i>             |                      |                      |
| Vacation/Getaway  | 76.5%                | 77.6%                |
| Business Travelers/Conferences/Business Meetings              | 23.4                 | 24.0                 |
| Visit with Friends and Relatives                              | 12.8                 | 12.0                 |
| <b>First Visit to Collier County</b> (% Yes)                  | 31.1%                | 35.8%                |
| <b>First Visit to Florida</b> (% Yes)                         | 6.6%                 | 7.2%                 |
| <b>Assisted by Travel Professional</b> (% Yes)                | 13.2%                | 12.7%                |
| <b>Length of Stay in Collier County</b> (# of days)           | 4.3 days             | 4.4 days             |
| <b>Party Size</b> (# of People)                               | 2.3 people           | 2.2 people           |
| <b>Satisfaction with Collier County</b>                       |                      |                      |
| Very Satisfied  | 84.1%                | 85.5%                |
| Satisfied   | 7.9                  | 7.8                  |
| <b>Satisfaction Level</b> <i>(Very Satisfied + Satisfied)</i> | <b>92.0%</b>         | <b>93.3%</b>         |
| <b>Recommend Collier to Friends/Relatives</b>                 |                      |                      |
| Yes   | 90.7%                | 89.2%                |

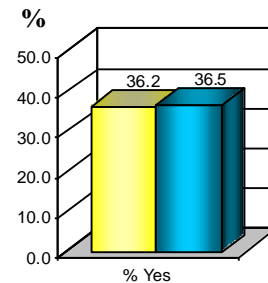


# February 2010 Visitor Profile -- Naples, Marco Island, Everglades

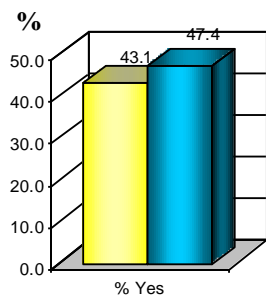
|   | February 2009 | February 2010 |
|---|---------------|---------------|
| <b>Activities Enjoyed in Area (Multiple Response)</b> |               |               |
| Dining Out  | 59.9%         | 65.8%         |
| Relaxing  | 51.5          | 52.5          |
| Beach   | 55.2          | 52.1          |
| Shopping  | 32.2          | 37.6          |
| Pool  | 22.2          | 26.1          |
| Walking   | 14.2          | 19.5          |
| Sunning   | 16.0          | 17.3          |
| Visit Friends/Relatives                               | 16.7          | 16.3          |
| Sightseeing   | 12.5          | 16.2          |
| Golfing   | 16.0          | 13.8          |
| Reading   | 7.8           | 13.1          |
| Everglades Adventures                                 | 12.1          | 12.8          |
| Bars/Nightlife  | 9.8           | 11.5          |
| Swimming  | 13.8          | 11.4          |
| Boating   | 8.8           | 9.0           |
| <b>Expense Relative to Expectations</b>               |               |               |
| More Expensive  | 14.3%         | 10.8%         |
| Less Expensive  | 1.0           | 3.0           |
| As Expected   | 79.9          | 80.7          |
| Don't Know  | 4.8           | 5.4           |
| <b>Plan to Return (% Yes)</b>                         |               |               |
| To Local Area   | 92.4%         | 90.6%         |
| Next Year (Base: Return to Local Area)                | 52.8          | 57.5          |
| <b>Average Age Head of Household (Years)</b>          | 52.1          | 51.8          |
| <b>Median Annual Household Income</b>                 | \$179,070     | \$174,377     |
| <b>See/Read/Hear Collier Message (% Yes)</b>          | 36.2%         | 36.5%         |
| <b>Type of Message Seen (Multiple Response)</b>       |               |               |
| Internet  | 74.2%         | 76.0%         |
| Newspaper   | 38.0          | 30.4          |
| Travel Guides/Visitor Guides/Brochures                | 21.7          | 26.3          |
| Television  | 14.2          | 18.6          |
| Magazine  | 12.5          | 10.5          |
| <b>Influenced by Collier Message</b>                  |               |               |
| (Base: Respondents Reporting See/Read/Hear Message)   | 43.1%         | 47.4%         |



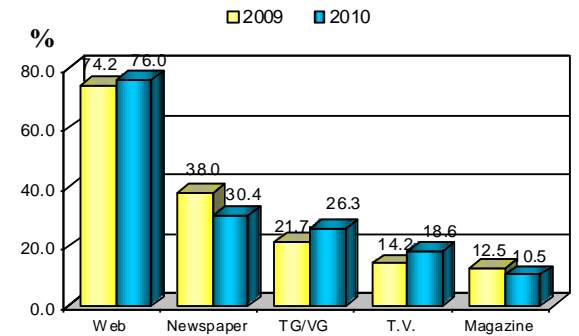
**See/Hear/Read Message**



**Influenced by Message**



**Type of Message Seen**



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

- ❖ Activities, things to do.
- ❖ Appears brand new.
- ❖ Beautiful area.
- ❖ Calming.
- ❖ Love it. Can't get enough.
- ❖ Casino.
- ❖ Cheap, direct flights.
- ❖ Clean and new.
- ❖ Close, but feels far away.
- ❖ Comfortable and convenient.
- ❖ Easy getting around.
- ❖ Every Canadian's dream.
- ❖ Friendly.
- ❖ Good location to explore from.
- ❖ Green, lots of flowers.
- ❖ High quality.
- ❖ Kid-friendly.
- ❖ Laid back.
- ❖ Lovely.
- ❖ Low key.
- ❖ More to do here.
- ❖ Naples is the most attractive city in Florida.
- ❖ Nice beach.
- ❖ Nice greenery and buildings.
- ❖ Nice roads.
- ❖ Nicest resort area in the U.S.
- ❖ Not overly commercial.
- ❖ Older demographic.
- ❖ Paradise.
- ❖ Parks and recreation and the zoo are awesome.
- ❖ Peaceful.
- ❖ Pristine.
- ❖ Quiet.
- ❖ Relaxed atmosphere.
- ❖ Safe.
- ❖ Sunny.
- ❖ Upscale.
- ❖ Village feel.
- ❖ Warm.
- ❖ Water taxi.
- ❖ Welcoming.
- ❖ Well-groomed.