

# RESEARCH DATA SERVICES, INC.

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

### March 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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**Executive Summary: March 2010**

1. Some 190,800 travelers visited the Naples, Marco Island, Everglades area this March **(+4.0%)**, with occupancy increasing by 3.7%. The total impact of Collier tourism reached \$187,191,621 **(+2.5%)**.
2. In a month when Florida tourism was growing again, Collier's core origin markets grew strongly. The origin distribution is as follows:

<u>Mar. Visitor Segments</u>	<u>2009 Visitor #</u>	<u>2010 Visitor #</u>	<u>% Δ</u>
Florida	48,234	48,082	-0.3
Southeast	15,405	14,882	-3.4
Northeast	48,418	53,424	+10.3
Midwest	40,165	41,976	+4.5
Canada	3,668	4,007	+9.2
Europe	17,423	18,508	+6.2
Markets of Opportunity	10,087	9,921	-1.6
<b>Total</b>	<b>183,400</b>	<b>190,800</b>	<b>+4.0</b>

3. Among the features most influential in drawing visitors to Collier, March travelers cite:

<u>Influential Features</u>	<u>Percent</u>
Unspoiled Environment	80.7%
White, Sandy Beaches	80.4
Warm Weather	80.2
Dining Opportunities	77.9
Relaxation	71.3
Upscale Lodgings	68.6
Upscale Shopping	57.9
Value for the Money	57.2
Very Safe Beaches for Children	49.1

## *Naples, Marco Island, Everglades: March 2010 Summary*

4. This month, 35.3% of Collier visitors came to destination for the first time *(2009: 36.3%)*.
5. A growing majority of March visitors fly to reach the Naples, Marco Island, Everglades area *(2009: 64.8%; 2010: 67.3%)*. Southwest Florida International (RSW) again is the primary airport of deplanement *(2009: 77.7%; 2010: 73.4%)*
6. Reflecting the recovery of the national economy, the month of March saw a 24.1% increase in the group/business travel segment *(2009: 24,759 visitors; 2010: 30,719 visitors)*.
7. Travelers' use of Internet information has reached 94.9%, with 81.5% seeking information for the current trip on the web. Airline, hotel, and destination websites; Travelocity; Expedia; and Orbitz are sources cited most frequently by March visitors. Two of every three visitors (64.0%) report booking travel for their trip on the Internet *(2009: 59.4%)*.
8. When queried, fully 39.1% of March visitors saw a message promoting the Naples, Marco Island, Everglades area *(2009: 36.4%)*, with 35.5% of these saying that the message influenced their choice of Collier for this trip *(2009: 34.8%)*.
9. The majority of visitors are satisfied with their experience in the destination *(2010: 95.4% satisfaction rating)*, and fully six of every ten (60.7%) are planning to return next year *(2009: 54.4%)*.
10. This March's visitors are younger *(2009: 52.7 years of age; 2010: 48.7 years of age)* and command a median household income of \$146,042.

**Naples, Marco Island, Everglades:**  
*March 2010 Visitor Profile*



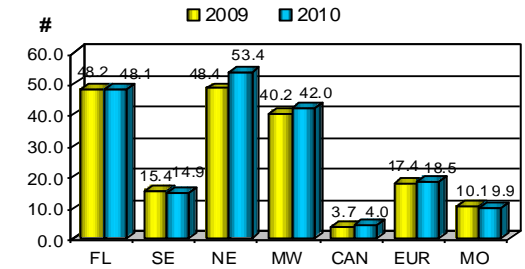
# March 2010 Visitor Profile – Naples, Marco Island, Everglades

Visitor Volume	Annual 2009	Year to Date		% Δ '09/'10	March		% Δ '09/'10
		2009	2010		2009	2010	
Visitors (#)	1,338,800	470,700	495,300	+5.2	183,400	190,800	+4.0
Room Nights	1,985,930	632,430	672,660	+6.4	243,950	253,100	+3.8
Direct Exp. (\$)	\$756,482,900	\$290,612,500	\$297,795,000	+2.5	\$122,483,700	\$125,547,700	+2.5

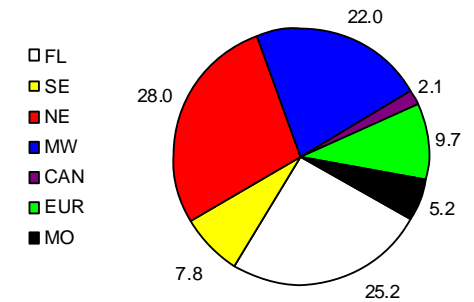
Visitor Origin	YTD # of Visitors			% Δ '09/'10	Rel %	March # of Visitors			% Δ '09/'10
	2009	2010				2009	Rel %	2010	
Florida	125,638	125,057	-0.5	26.3%	48,234	25.2%	48,082	-0.3	
Southeast	32,207	33,583	+4.3	8.4	15,405	7.8	14,882	-3.4	
Northeast	131,535	143,377	+9.0	26.4	48,418	28.0	53,424	+10.3	
Midwest	98,061	103,986	+6.0	21.9	40,165	22.0	41,976	+4.5	
Canada	14,087	14,742	+4.6	2.0	3,668	2.1	4,007	+9.2	
Europe	47,793	50,598	+5.9	9.5	17,423	9.7	18,508	+6.2	
Markets of Opp.	21,379	23,957	+12.1	5.5	10,087	5.2	9,921	-1.6	
<b>Total</b>	<b>470,700</b>	<b>495,300</b>	<b>+5.2</b>	<b>100.0</b>	<b>183,400</b>	<b>100.0</b>	<b>190,800</b>	<b>+4.0</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	83.3									
<b>Δ Pts. ('09/'10)</b>	<b>+6.8</b>	<b>+3.3</b>	<b>+3.0</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	235.8									
<b>Δ % ('09/'10)</b>	<b>-7.6%</b>	<b>-7.9%</b>	<b>-2.2%</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	196.4									
<b>Δ % ('09/'10)</b>	<b>+2.6%</b>	<b>-4.0%</b>	<b>+1.4%</b>									

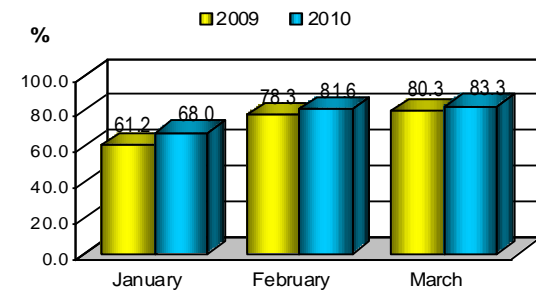
March Visitor Origins (in Thousands)



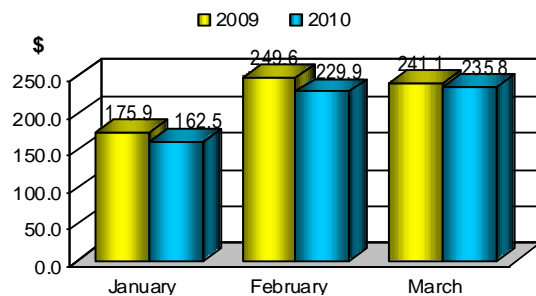
March 2010 Visitor Origins (%)



Occupancy

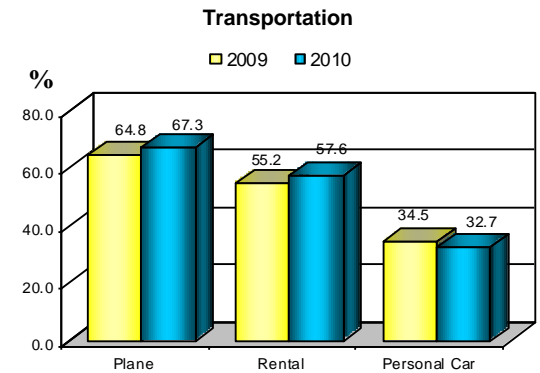


Room Rates

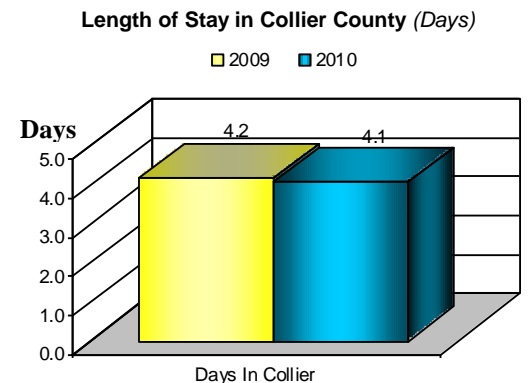
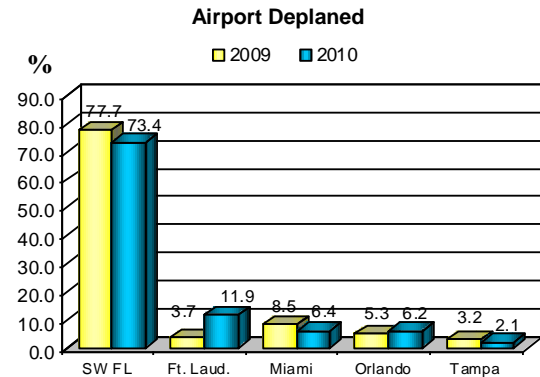


# March 2010 Visitor Profile -- Naples, Marco Island, Everglades

	<u>March 2009</u>	<u>March 2010</u>
<b>Transportation Mode</b> (Multiple Response)		
Plane	64.8%	67.3%
Rental Car	55.2	57.6
Personal Car	34.5	32.7
<b>Airport Deplaned</b> (Base: Flew)		
Southwest Florida International	77.7%	73.4%
Fort Lauderdale	3.7	11.9
Miami International	8.5	6.4
Orlando International/Sanford	5.3	6.2
Tampa International	3.2	2.1



	<u>March 2009</u>	<u>March 2010</u>
<b>Purpose of Trip</b> (Multiple Response)		
Vacation	70.5%	73.8%
Business Travelers/Conferences/Business Meetings	13.5	16.1
Visit with Friends and Relatives	16.7	13.7
<b>First Visit to Collier County</b> (% Yes)	36.3%	35.3%
<b>First Visit to Florida</b> (% Yes)	7.5%	6.6%
<b>Assisted by Travel Professional</b> (% Yes)	9.7%	11.0%
<b>Length of Stay in Collier County</b> (# of days)	4.2 days	4.1 days
<b>Party Size</b> (# of People)	2.5 people	2.4 people
<b>Satisfaction with Collier County</b>		
Very Satisfied	78.5%	82.2%
Satisfied	18.2	13.2
<b>Satisfaction Level</b> (Very Satisfied + Satisfied)	96.7%	95.4%
<b>Recommend Collier to Friends/Relatives</b>		
Yes	92.9%	93.3%



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

	<u>March 2009</u>	<u>March 2010</u>
<b>Activities Enjoyed in Area (Multiple Response)</b>		
Relaxing	77.4%	72.1%
Dining Out	67.7	71.7
Beach	72.7	68.8
Pool	44.7	52.3
Shopping	46.9	44.0
Swimming	36.4	30.7
Visit Friends/Relatives	29.1	28.4
Sightseeing	25.6	25.0
Reading	21.0	22.7
Sunning	15.1	19.6
Walking	15.9	19.0
Everglades Adventures/Nature	15.7	17.8
Sunsets	12.2	17.5
Golfing	13.0	13.6
Shelling	12.8	11.4
<b>Expense Relative to Expectations</b>		
More Expensive	5.5%	6.9%
Less Expensive	2.1	3.5
As Expected	78.8	81.2
Don't Know	13.7	8.5
<b>Plan to Return (% Yes)</b>		
To Local Area	85.6%	89.0%
Next Year (Base: Return to Local Area)	63.6	68.2
<b>Average Age Head of Household (Years)</b>		
	52.7	48.7
<b>Median Annual Household Income</b>		
	\$145,556	\$146,042
<b>See/Read/Hear Collier Message (% Yes)</b>		
	36.4%	39.1%
<b>Type of Message Seen (Multiple Response)</b>		
Internet	71.1%	75.4%
Magazine	17.4	23.3
Newspaper	13.0	14.7
Travel Guides/Visitor Guides/Brochures	13.2	12.0
Television	8.7	11.2
<b>Influenced by Collier Message</b>		
(Base: Respondents Reporting See/Read/Hear Message)	34.8%	35.5%

