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Naples, Marco Island, Everglades Convention and Visitors Bureau

June 2010 Visitor Profile



Prepared for:

Collier County Board of County Commissioners

and

Naples, Marco Island, Everglades Convention and Visitors Bureau

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Executive Summary: June 2010

1. This June, the Deepwater Horizon oil spill affected every segment of Florida’s tourism industry. Importantly, for the Naples, Marco Island Everglades area, it was a time when the destination was able to maintain stability. Consumer loyalty and the goodwill earned through the years, reinforced by proactive messaging, added 2.7% to the ranks of the destination’s commercial lodging visitors. Occupancy increased by 3.4% and the industry was able to maintain its Average Daily Rates (ADR’s) **(+0.6%)**. The total economic impact of tourism on Collier County reached \$80,904,642 **(+4.6%)**.
2. Collier’s June Midwestern and Floridian markets grew strongly. The origin distribution is as follows:

<u>June Visitor Segments</u>	<u>2009 Visitor #</u>	<u>2010 Visitor #</u>	<u>% Δ</u>
Florida	53,660	56,494	+5.3
Southeast	9,337	8,643	-7.4
Northeast	10,465	10,224	-2.3
Midwest	11,491	12,753	+11.0
Canada	1,539	2,003	+30.1
Europe	10,773	9,381	-12.9
Markets of Opportunity	5,335	5,902	+10.6
Total	102,600	105,400	+2.7

3. Among the features most influential in drawing visitors to Collier in June are:

<u>Influential Features</u>	<u>Percent</u>
White, Sandy Beaches	83.8%
Unspoiled Environment	83.3
Dining Opportunities	68.2
Relaxation	67.1
Sunning on the Beach	63.8
Upscale Lodgings	61.2
Upscale Shopping	54.0
Value for the Money	52.6

Naples, Marco Island, Everglades: June 2010 Summary

4. This June, 45.6% are first time visitors to the destination **(2009: 42.5%)**.
5. The majority of visitors drive to reach the Naples, Marco Island, Everglades area **(2009: 56.5%; 2010: 59.9%)**. Two thirds of visitors who fly use Southwest Florida International Airport (RSW) **(2009: 68.3%; 2010: 66.8%)**.
6. The month of June saw a 4.1 point increase in the group/business travel segment **(2009: 19.4%; 2010: 23.5%)**.
7. Better than three fourths of June visitors find the cost of their Collier trip to be what they expected **(2009: 76.7%; 2010: 78.3%)**.
8. Travelers' use of Internet travel information has reached the 97% level. Fully 78.2% sought information for their current trip on the web. Airline, hotel, and destination websites; Expedia; TripAdvisor; Travelocity; and Orbitz are sources cited most frequently by June visitors. Notably, some 12% are **now** volunteering the use of social networking sites such as Facebook and Twitter and/or traveler reviews/blogs for travel information. Social networking as a source of travel information for consumers has been rapidly gaining market share over the past 12 months.
9. More June visitors volunteer seeing a message promoting the destination **(2009: 32.5%; 2010: 37.1%)**. Importantly, 33.4% say the message played a role in their choosing Collier for this trip **(2009: 30.6%)**.
10. The majority of visitors are satisfied with their experience in Collier **(2010: 96.7% satisfaction rating)**. Over half (53.4%) say they plan to return next year.
11. This June's visitors command a higher median household income **(2009: \$123,611; 2010: \$125,956)**. Their average age is 45.7 **(2009: 46.5 years of age)**.

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



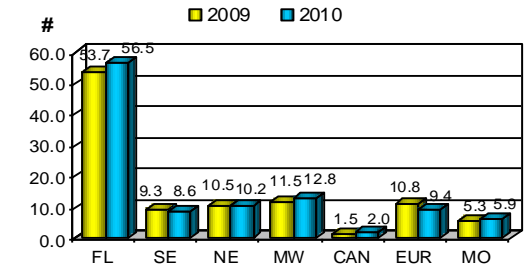
June 2010 Visitor Profile – Naples, Marco Island, Everglades

Visitor Volume	Annual 2009	Year to Date		% Δ '09/'10	June		% Δ '09/'10
		2009	2010		2009	2010	
Visitors (#)	1,338,800	786,300	823,400	+4.7	102,600	105,400	+2.7
Room Nights	1,985,930	1,128,230	1,190,810	+5.5	147,600	152,600	+3.4
Direct Exp. (\$)	\$756,482,900	\$489,091,200	\$507,591,000	+3.8	\$51,871,200	\$54,262,000	+4.6

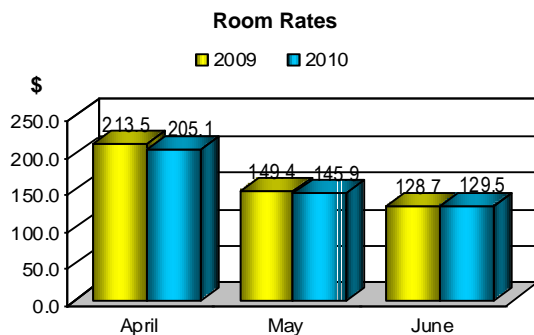
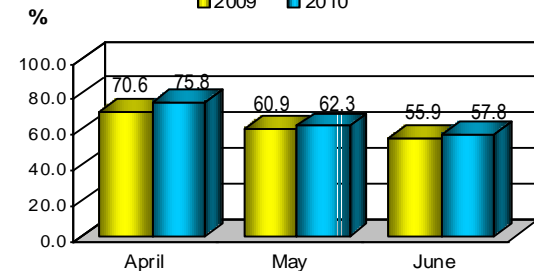
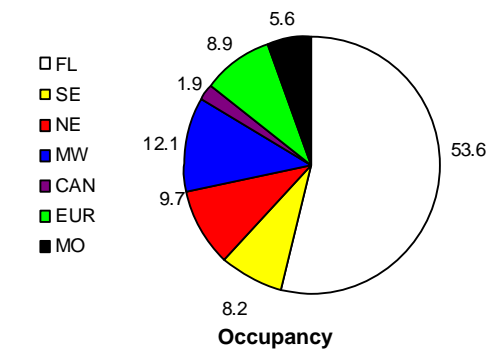
Visitor Origin	YTD # of Visitors			Rel %	June # of Visitors			% Δ '09/'10
	2009	2010	% Δ '09/'10		2009	2010	% Δ '09/'10	
Florida	268,239	275,473	+2.7	52.3%	53,660	56,494	+5.3	
Southeast	55,285	56,485	+2.2	9.1	9,337	8,643	-7.4	
Northeast	178,911	191,103	+6.8	10.2	10,465	10,224	-2.3	
Midwest	141,219	150,561	+6.6	11.2	11,491	12,753	+11.0	
Canada	19,655	21,416	+9.0	1.5	1,539	2,003	+30.1	
Europe	86,272	88,818	+3.0	10.5	10,773	9,381	-12.9	
Markets of Opp.	36,719	39,544	+7.7	5.2	5,335	5,902	+10.6	
Total	786,300	823,400	+4.7	100.0	102,600	105,400	+2.7	

Occupancy	Jan.	Feb.	Mar.	Apr.	June	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	75.8	62.3	57.8						
Δ Pts. ('09/'10)	+6.8	+3.3	+3.0	+5.2	+1.4	+1.9						
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	205.1	145.9	129.5						
Δ % ('09/'10)	-7.6%	-7.9%	-2.2%	-3.9%	-2.3%	+0.6%						
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	155.5	90.9	74.9						
Δ % ('09/'10)	+2.6%	-4.0%	+1.4%	+3.2%	-0.1%	+4.2						

June Visitor Origins (in Thousands)

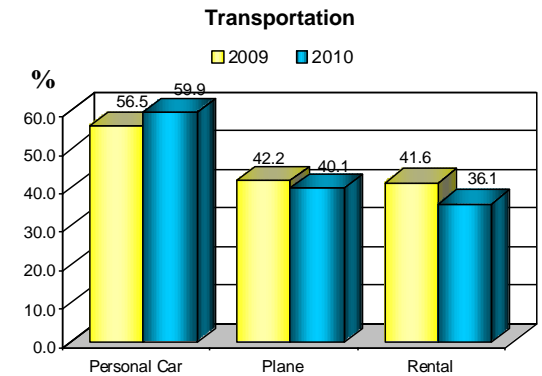


June 2010 Visitor Origins (%)

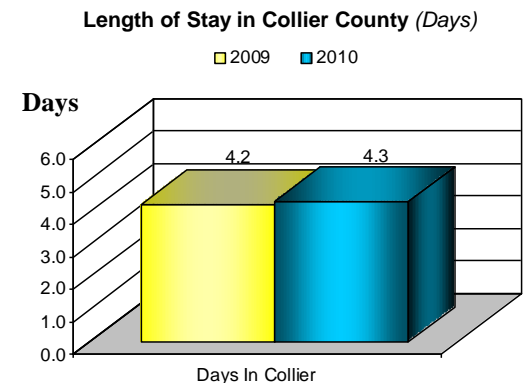
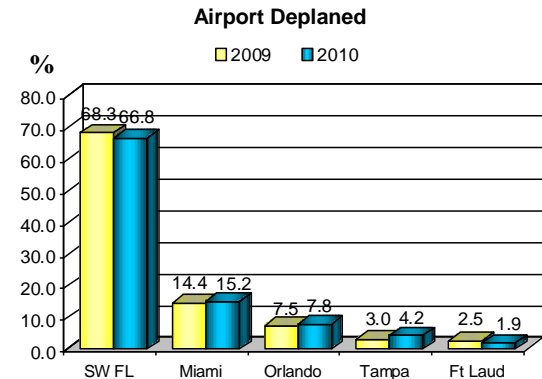


June 2010 Visitor Profile -- Naples, Marco Island, Everglades

	<u>June 2009</u>	<u>June 2010</u>
Transportation Mode (Multiple Response)		
Personal Car	56.5%	59.9%
Plane	42.2	40.1
Rental Car	41.6	36.1
Airport Deplaned (Base: Flew)		
Southwest Florida International	68.3%	66.8%
Miami International	14.4	15.2
Orlando International/Sanford	7.5	7.8
Tampa International	3.0	4.2
Fort Lauderdale International	2.5	1.9

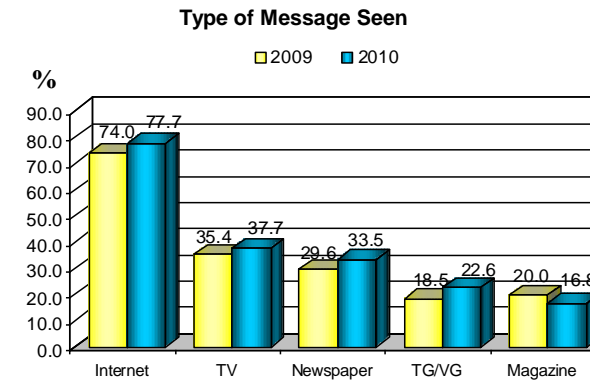
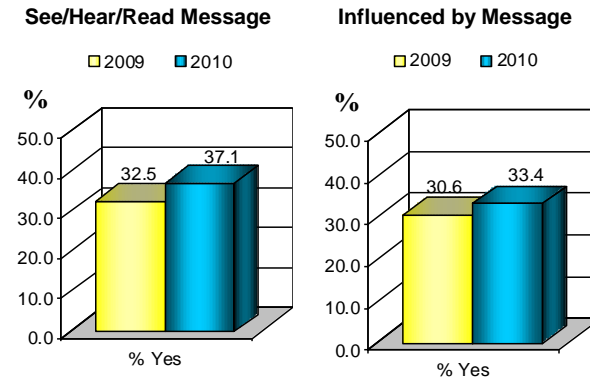
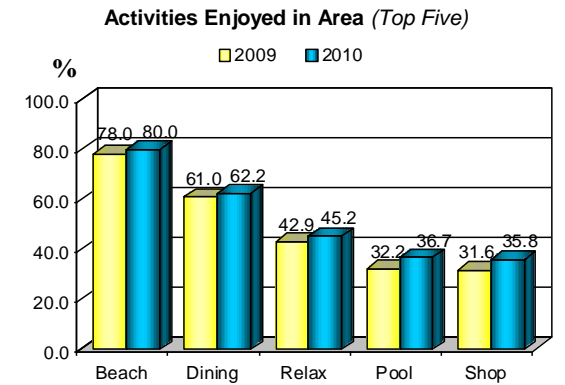


	<u>June 2009</u>	<u>June 2010</u>
Purpose of Trip (Multiple Response)		
Vacation	82.3%	80.7%
Business Travelers/Conferences/Business Meetings	19.4	23.5
Visit with Friends and Relatives	5.9	9.1
Special Event	5.8	8.2
First Visit to Collier County (% Yes)	42.5%	45.6%
First Visit to Florida (% Yes)	4.5%	5.4%
Assisted by Travel Professional (% Yes)	6.9%	6.3%
Length of Stay in Collier County (# of days)	4.2 days	4.3 days
Party Size (# of People)	2.6 people	2.6 people
Satisfaction with Collier County		
Very Satisfied	83.0%	82.7%
Satisfied	11.3	14.0
Satisfaction Level (Very Satisfied + Satisfied)	94.3%	96.7%
Recommend Collier to Friends/Relatives		
Yes	92.8%	92.1%



June 2010 Visitor Profile -- Naples, Marco Island, Everglades

	June 2009	June 2010
Activities Enjoyed in Area (Multiple Response)		
Beach	78.0%	80.0%
Dining Out	61.0	62.2
Relaxing	42.9	45.2
Pool	32.2	36.7
Shopping	31.6	35.8
Sightseeing	14.9	19.0
Everglades Adventures/Nature	9.5	17.7
Sunsets	N/A	16.6
Swimming	8.0	15.4
Reading	13.2	15.1
Visit Friends/Relatives	9.7	11.8
Sunning	6.9	10.7
Bars & Nightlife	10.5	10.2
Golfing	8.1	8.7
Boating	5.4	8.5
Expense Relative to Expectations		
More Expensive	8.5%	8.7%
Less Expensive	8.9	7.9
As Expected	76.7	78.3
Don't Know	5.9	5.1
Plan to Return (% Yes)		
To Local Area	85.1%	88.4%
Next Year (Base: Return to Local Area)	64.1	60.4
Average Age Head of Household (Years)		
	46.5	45.7
Median Annual Household Income		
	\$123,611	\$125,956
See/Read/Hear Collier Message (% Yes)		
	32.5%	37.1%
Type of Message Seen (Multiple Response)		
Internet	74.0%	77.7%
Television	35.4	37.7
Newspaper	29.6	33.5
Travel Guides/Visitor Guides/Brochures	18.5	22.6
Magazine	20.0	16.8
Radio	N/A	15.5
Influenced by Collier Message		
(Base: Respondents Reporting See/Read/Hear Message)	30.6%	33.4%



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

- ❖ Awesome.
- ❖ Calming.
- ❖ Changing.
- ❖ Charming.
- ❖ Clean.
- ❖ Comfortable.
- ❖ Dolphin tour.
- ❖ Easy to get around.
- ❖ Everglades.
- ❖ Family friendly.
- ❖ Fantastic shelling.
- ❖ Friendly people.
- ❖ Fun.
- ❖ Great clients in a nice area.
- ❖ Great people and beaches.
- ❖ High end.
- ❖ Hospital.
- ❖ Hot.
- ❖ Kayaking.
- ❖ Leisurely.
- ❖ Less congested.
- ❖ Lovely.
- ❖ Magnificent.
- ❖ Older generation.
- ❖ Our vacation package included a great fishing trip.
- ❖ Paradise.
- ❖ Part of a whole tour of Florida.
- ❖ Peaceful.
- ❖ Plenty to do.
- ❖ Pretty.
- ❖ Pricey.
- ❖ Quiet.
- ❖ Relaxing.
- ❖ Safe.
- ❖ Seminole Casino.
- ❖ Serene.
- ❖ Shopping.
- ❖ Snorkeling.
- ❖ The gulf is very peaceful.
- ❖ Tidy.
- ❖ Tourist friendly.
- ❖ Tranquil.
- ❖ Tropical feel.
- ❖ Up market.
- ❖ Very friendly and welcoming service industry.
- ❖ We have enjoyed the beauty of Naples.
- ❖ Wonderful baseball parks to play with kids.
- ❖ Zoo.