

RESEARCH DATA SERVICES, INC.

777 SOUTH HARBOUR ISLAND BOULEVARD • SUITE 260
TAMPA, FLORIDA 33602
TEL (813) 254-2975 • FAX (813) 254-2986

Naples, Marco Island, Everglades Convention and Visitors Bureau

March 2011 Visitor Profile



Prepared for:

Collier County Board of County Commissioners

and

Naples, Marco Island, Everglades Convention and Visitors Bureau

Prepared by:

Walter J. Klages, Ph.D.

President

Research Data Services, Inc.

Research@KlagesGroup.com

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Naples, Marco Island, Everglades: March 2011 Summary

4. Although air travel remains a major component of Collier's market reach (2010: 67.3%; 2011: 66.0%), this March, the drive market accounted for better than one-third of all visitation (2010: 32.7%; 2011: 34.0%).
5. In tandem with strengthening economic activity, Collier's important group/business segment also expanded significantly this March (+17.0%).
6. The Internet is cited by 83.0% of March visitors as their principal source of travel information. Visitors cite using hotel, airline, and destination websites, as well as Expedia, Travelocity, TripAdvisor, Hotels.com, Orbitz, and Priceline. Social networks are also gaining informational importance in travelers' vacation planning.
7. The vast majority of Collier patrons (95.7%) express a high level of satisfaction with their stay in the destination; a significant majority (61.8%) plan to return to the Naples, Marco Island, Everglades area next year. (2010: 60.7%).
8. This March's visitors are, on average, 51.2 years of age and command a median household income of \$146,604.
9. RDS's three-month forward management barometer for Collier County reflects continuing positive trending for the county's tourism economy:

% of Properties	2009	2010	2011
<u>Reporting Reservations:</u>			
Up	9.1%	33.3%	35.7%
The Same	30.3	23.3	17.9
Down	57.6	36.7	25.0

Naples, Marco Island, Everglades:
March 2011 Visitor Profile

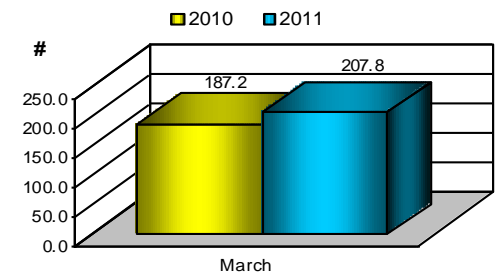


March 2011 Visitor Profile – Naples, Marco Island, Everglades

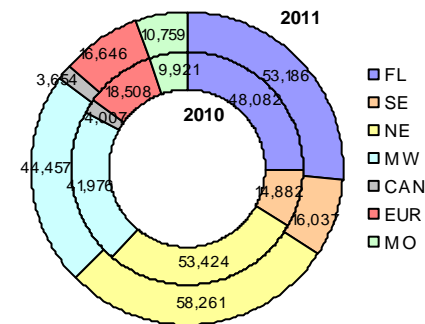
Visitor Volume	Calendar Year	Year to Date		% Δ	March		% Δ
	2010	2010	2011	'10/'11	2010	2011	'10/'11
Visitors (#)	1,383,500	495,300	511,700	+3.3	190,800	203,000	+6.4
Room Nights	2,052,310	672,660	691,500	+2.8	253,100	270,700	+7.0
Econ. Impact *	\$1,166,078,894	\$444,012,345	\$470,084,717	+5.9	\$187,191,621	\$207,824,377	+11.0

Visitor Origin	YTD # of Visitors			% Δ	March # of Visitors				% Δ
	2010	2011	'10/'11	Rel %	2010	Rel %	2011	'10/'11	
Florida	125,057	136,477	+9.1	25.2%	48,082	26.2%	53,186	+10.6	
Southeast	33,583	36,998	+10.2	7.8	14,882	7.9	16,037	+7.8	
Northeast	143,377	151,022	+5.3	28.0	53,424	28.7	58,261	+9.1	
Midwest	103,986	104,921	+0.9	22.0	41,976	21.9	44,457	+5.9	
Canada	14,742	11,654	-20.9	2.1	4,007	1.8	3,654	-8.8	
Europe	50,598	46,828	-7.5	9.7	18,508	8.2	16,646	-10.1	
Markets of Opp.	23,957	23,800	-0.7	5.2	9,921	5.3	10,759	+8.4	
Total	495,300	511,700	+3.3	100.0	190,800	100.0	203,000	+6.4	

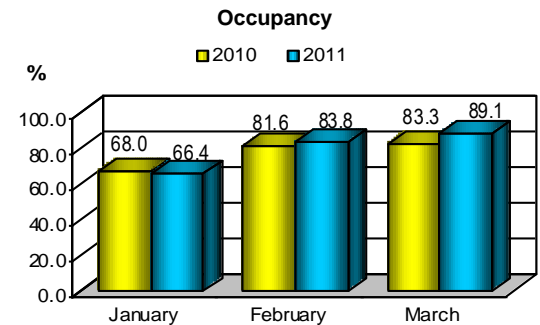
March Economic Impact (in Millions)



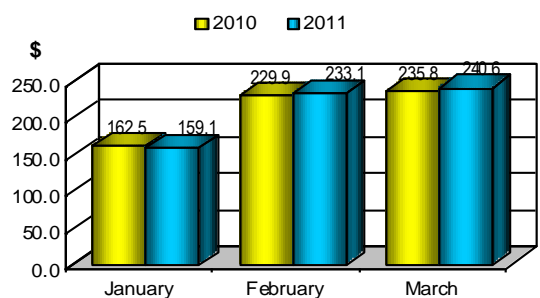
March 2011 Visitor Origins



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									
Δ % ('10/'11)	-2.4%	+2.7%	+7.0%									
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									
Δ % ('10/'11)	-2.1%	+1.4%	+2.0%									
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									
Δ % ('10/'11)	-4.4%	+4.1%	+9.2%									



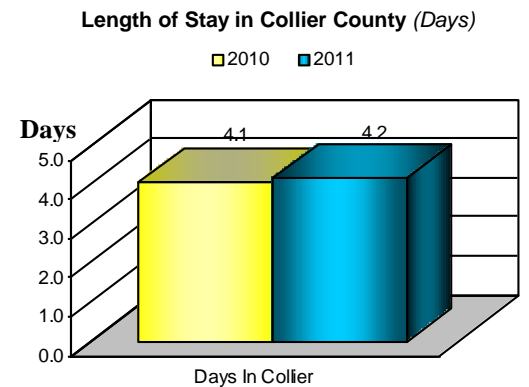
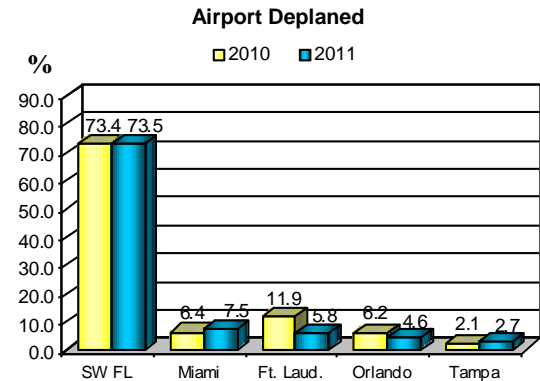
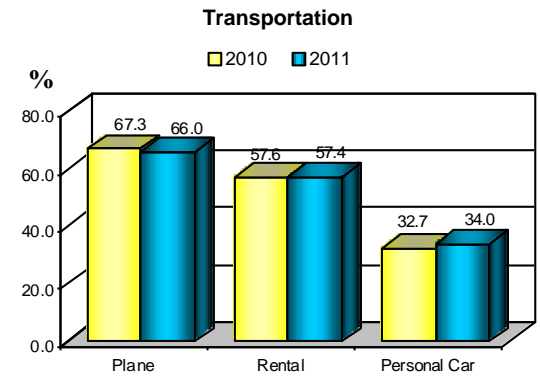
Room Rates



* Based on Minnesota Implan Multipliers.

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

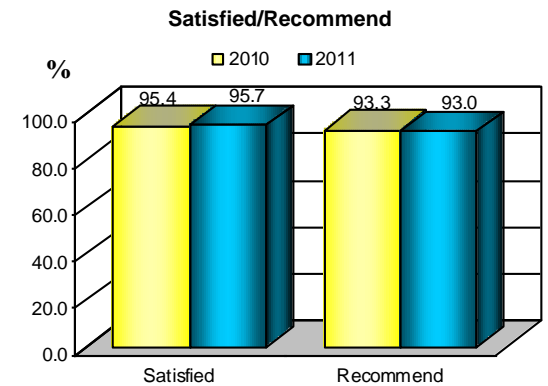
	<u>March 2010</u>	<u>March 2011</u>
Transportation Mode <i>(Multiple Response)</i>		
Plane	67.3%	66.0%
Rental Car	57.6	57.4
Personal Car	32.7	34.0
Airport Deplaned <i>(Base: Flew)</i>		
Southwest Florida International	73.4%	73.5%
Miami International	6.4	7.5
Fort Lauderdale	11.9	5.8
Orlando International/Sanford	6.2	4.6
Tampa International	2.1	2.7
Purpose of Trip <i>(Multiple Response)</i>		
Vacation	73.8%	76.0%
Business Travelers/Conferences/Business Meetings	16.1	17.7
Visit with Friends and Relatives	13.7	9.4
First Visit to Collier County <i>(% Yes)</i>		
	35.3%	31.3%
First Visit to Florida <i>(% Yes)</i>		
	6.6%	5.7%
Length of Stay in Collier County <i>(# of days)</i>		
	4.1 days	4.2 days
Party Size <i>(# of People)</i>		
	2.4 people	2.5 people
Party Composition <i>(Multiple Response)</i>		
Couple	48.2%	48.8%
Family	36.5	32.1
Single	7.4	8.9
Group of Friends	5.5	4.9



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

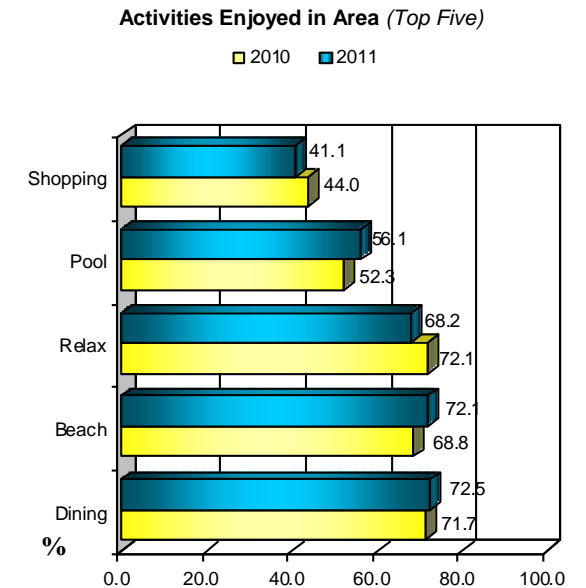
	<u>March 2010</u>	<u>March 2011</u>
Satisfaction with Collier County		
Very Satisfied	82.2%	87.1%
Satisfied	13.2	8.6
Satisfaction Level (<i>Very Satisfied + Satisfied</i>)	95.4%	95.7%

	<u>March 2010</u>	<u>March 2011</u>
Recommend Collier to Friends/Relatives		
Yes	93.3%	93.0%



Activities Enjoyed in Area (*Multiple Response*)

Activity	2010 (%)	2011 (%)
Dining Out	71.7%	72.5%
Beach	68.8	72.1
Relaxing	72.1	68.2
Pool	52.3	56.1
Shopping	44.0	41.1
Swimming	30.7	26.4
Visit Friends/Relatives	28.4	24.2
Sightseeing	25.0	23.9
Reading	22.7	21.6
Sunning	19.6	20.8
Walking	19.0	16.2
Everglades Adventures/Nature	17.8	14.8
Sunsets	17.5	14.0
Bars/Nightlife	N/A	12.2
Golfing	13.6	10.3



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

	<u>March 2010</u>	<u>March 2011</u>
Expense Relative to Expectations		
More Expensive	6.9%	11.1%
Less Expensive	3.5	N/A
As Expected	81.2	83.4
Don't Know	8.5	5.5
Plan to Return (% Yes)		
To Local Area	89.0%	86.3%
Next Year (Base: Return to Local Area)	68.2	71.6
Collier Base Budget		
Total	\$1,579.22	\$1,716.56
Per Person/Day	658.01	686.63
Per Person/Trip	160.49	163.48
Avg. Party Budget Breakdown		
Accommodations	\$733.45	\$780.35
Food/Entertainment	586.56	621.45
Retail	235.15	246.66
Average Age Head of Household (Years)		
	48.7	51.2
Median Annual Household Income		
	\$146,042	\$146,604
See/Read/Hear Collier Message (% Yes)		
	39.1%	42.2%
Type of Message Seen (Multiple Response)		
Internet	75.4%	79.1%
Magazine	23.3	22.9
Television	11.2	22.1
Newspaper	14.7	11.3
Travel Guides/Visitor Guides/Brochures	12.0	9.6
Influenced by Collier Message		
(Base: Respondents Reporting See/Read/Hear Message)	35.5%	34.2%

