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Naples, Marco Island, Everglades Convention and Visitors Bureau

July 2011 Visitor Profile



Prepared for:

Collier County Board of County Commissioners

and

Naples, Marco Island, Everglades Convention and Visitors Bureau

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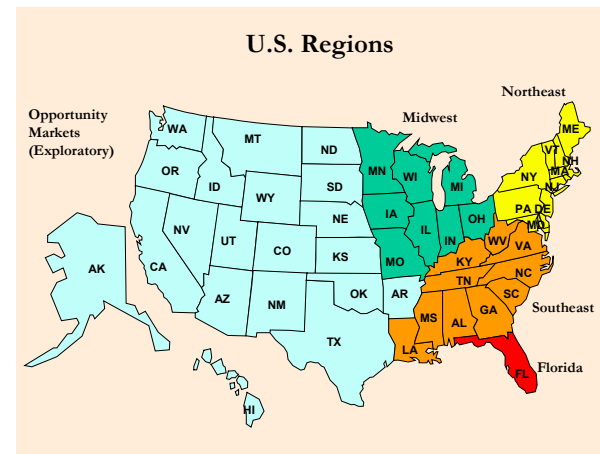
Executive Summary: July 2011

- In a season of pronounced economic volatility, Collier achieved exceptionally strong growth of its tourism industry. This July, Collier visitation reached 109,900 travelers, an increase of +7.7% and occupancy expanded by +4.9%. Signaling greater control over rates, ADR also increased by +4.4%. A record \$80 million of economic impact was added to Collier County's transactions (+12.1%). The industry's forward-looking reservation barometer suggests continued strength over the next three months:

% of Properties	2009	2010	2011
Reporting Reservations:			
Up	5.7%	12.1%	39.5%
The Same	17.1	27.3	28.9
Down	74.3	51.5	21.1

- Collier's July origin distribution is as follows:

July Visitation	2010 Visitor #	2011 Visitor #	% Δ
Florida	59,262	61,984	+4.6
Southeast	6,426	7,253	+12.9
Northeast	9,690	10,880	+12.3
Midwest	5,508	6,264	+13.7
Canada	1,836	1,649	-10.2
Europe	13,056	14,946	+14.5
Mkts. of Opp.	6,222	6,924	+11.3
Total	102,000	109,900	+7.7



Naples, Marco Island, Everglades: July 2011 Summary

3. Visitors relay interesting images and perceptions about the destination:

- Affluent.
- Affordable.
- Beyond relaxing. Can't wait to come back!
- Calming.
- Caribbean-like.
- Charming.
- Clean and safe.
- Cosmopolitan.
- Great ambiance, not too commercialized.
- Great cloud formations.
- Great example of how nature can be enjoyed.
- Great for kids.
- Green.
- Hidden secret gem.
- Ideal for a family vacation.
- Natural, but built up.
- Nice water.
- Nice, small, boutique-y town.
- Not enough restaurants.
- Orderly.
- Paradise in our own backyard.
- Picturesque resorts.
- Pristine.
- Relaxed.
- Retreat.
- Sleepy.
- Tourist friendly.
- Tropical, glorious sunsets.
- Upscale.
- Welcoming.

4. The majority of July visitors (**62.6%**) drive to reach the destination (**2010: 63.9%**), with repeat visitors significantly more likely than first timers to drive (**73.5%**). Southwest Florida International (RSW) remains the primary airport of deplanement (**2010: 51.9%; 2011: 53.0%**). First time visitors are more likely to use Miami and Orlando International.

5. The Internet is cited by 83.6% of July visitors as a principal source of travel information. URL's most frequently accessed include hotel, airline, and destination websites. Better than one of every three visitors (**27.3%**) reports consulting traveler reviews such as TripAdvisor and/or social networking sites to validate their choices. Visitors also use sites such as Expedia, Hotels.com, Travelocity, Priceline, and Hotwire.

6. The vast majority of Collier patrons (**95.6%**) express satisfaction with their stay. Fully 62.7% plan to return to the Naples, Marco Island, Everglades area next year. (**2010: 59.5%**).

7. This July's visitors are younger (**2010: 46.3 years of age; 2011: 45.6 years of age**) and command a median household income of \$125,983.

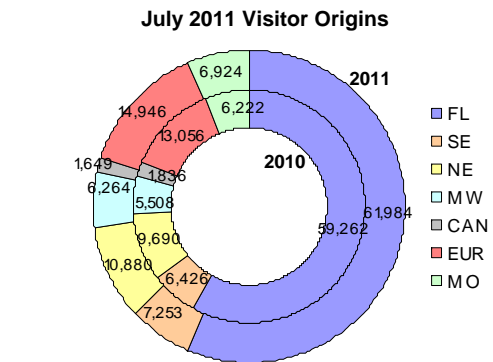
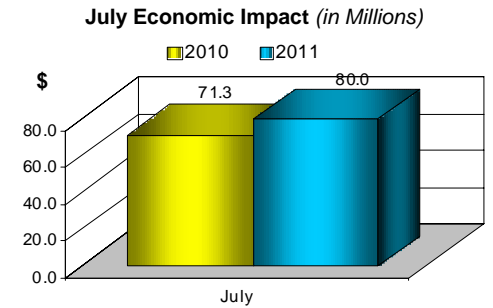
Naples, Marco Island, Everglades:
July 2011 Visitor Profile



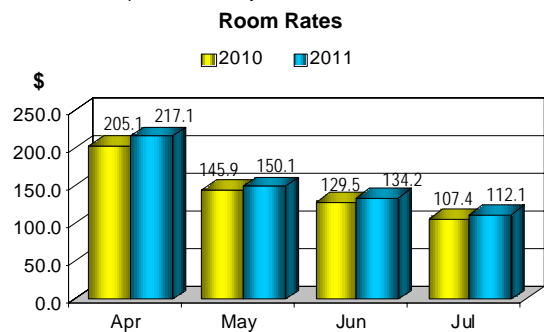
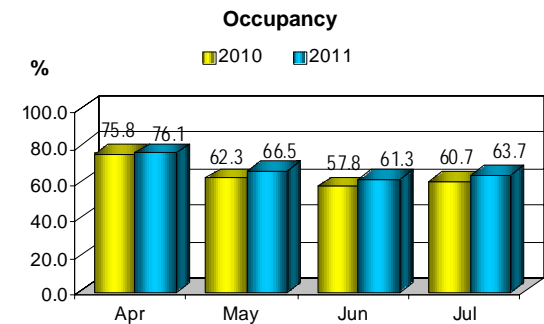
July 2011 Visitor Profile – Naples, Marco Island, Everglades

Visitor Volume	Calendar Year	Year to Date		% Δ	July		% Δ
	2010	2010	2011	'10/'11	2010	2011	'10/'11
Visitors (#)	1,383,500	925,400	972,600	+5.1	102,000	109,900	+7.7
Room Nights	2,052,310	1,356,410	1,407,100	+3.7	165,600	174,800	+5.6
Direct Exp. (\$)	\$782,078,400	\$555,424,900	\$598,685,300	+7.8	\$47,833,900	\$53,631,200	+12.1

Visitor Origin	YTD # of Visitors			% Δ	July # of Visitors			
	2010	2011	'10/'11	Rel %	2010	Rel %	2011	'10/'11
Florida	334,735	354,540	+5.9	58.1%	59,262	56.4%	61,984	+4.6
Southeast	62,911	70,737	+12.4	6.3	6,426	6.6	7,253	+12.9
Northeast	200,793	215,480	+7.3	9.5	9,690	9.9	10,880	+12.3
Midwest	156,069	160,679	+3.0	5.4	5,508	5.7	6,264	+13.7
Canada	23,252	21,215	-8.8	1.8	1,836	1.5	1,649	-10.2
Europe	101,874	102,284	+0.4	12.8	13,056	13.6	14,946	+14.5
Markets of Opp.	45,766	47,665	+4.1	6.1	6,222	6.3	6,924	+11.3
Total	925,400	972,600	+5.1	100.0	102,000	100.0	109,900	+7.7



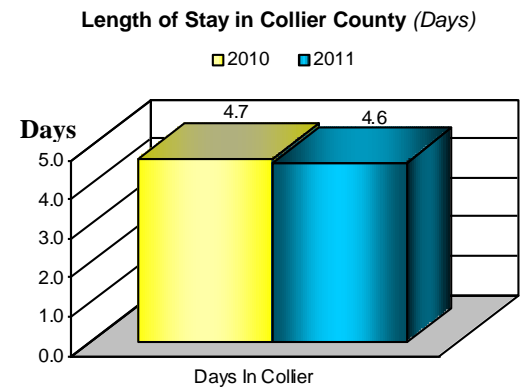
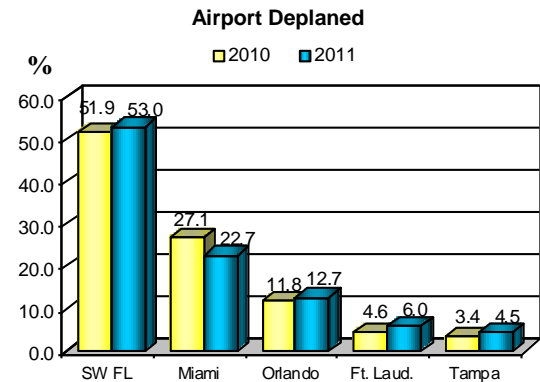
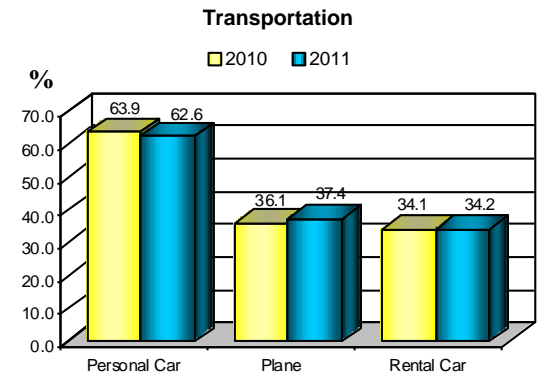
Occupancy	Jan.	Feb.	Mar.	Apr.	July	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
Occ. 2009	61.2%	78.3%	80.3%	70.6%	60.9%	55.9%	63.6%	45.7%	41.9%	51.8%	59.3%	60.4%
Occ. 2010	68.0	81.6	83.3	75.8	62.3	57.8	60.7	43.7	41.1	58.8	60.6	58.9
Occ. 2011	66.4	83.8	89.1	76.1	66.5	61.3	63.7					
Δ % ('10/'11)	-2.4%	+2.7%	+7.0%	+0.4%	+6.7%	+6.1%	+4.9%					
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	217.1	150.1	134.2	112.1					
Δ % ('10/'11)	-2.1%	+1.4%	+2.0%	+5.9%	+2.9%	+3.6%	+4.4%					
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	214.4	165.2	99.8	82.3	71.4					
Δ % ('10/'11)	-4.4%	+4.1%	+9.2%	+6.2%	+9.8%	+9.9%	+9.5%					



* Based on Minnesota Implan Multipliers.

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

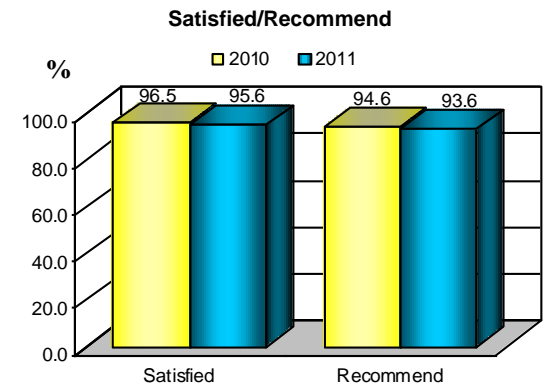
	<u>July 2010</u>	<u>July 2011</u>
Transportation Mode <i>(Multiple Response)</i>		
Personal Car	63.9%	62.6%
Plane	36.1	37.4
Rental Car	34.1	34.2
Airport Deplaned <i>(Base: Flew)</i>		
Southwest Florida International	51.9%	53.0%
Miami International	27.1	22.7
Orlando International/Sanford	11.8	12.7
Fort Lauderdale International	4.6	6.0
Tampa International	3.4	4.5
Purpose of Trip <i>(Multiple Response)</i>		
Vacation	87.9%	77.6%
Business Travelers	9.9	12.9
Visit with Friends and Relatives	12.4	9.6
Conferences/Business Meetings	5.7	6.4
Special Event	5.4	5.1
First Visit to Collier County (% Yes)	36.0%	36.8%
First Visit to Florida (% Yes)	5.9%	5.5%
Length of Stay in Collier County (# of days)	4.7 days	4.6 days
Party Size (# of People)	3.3 people	3.2 people
Party Composition <i>(Multiple Response)</i>		
Family	46.4%	44.7%
Couple	37.6	37.1
Single	9.0	11.4
Group of Friends	4.1	6.3



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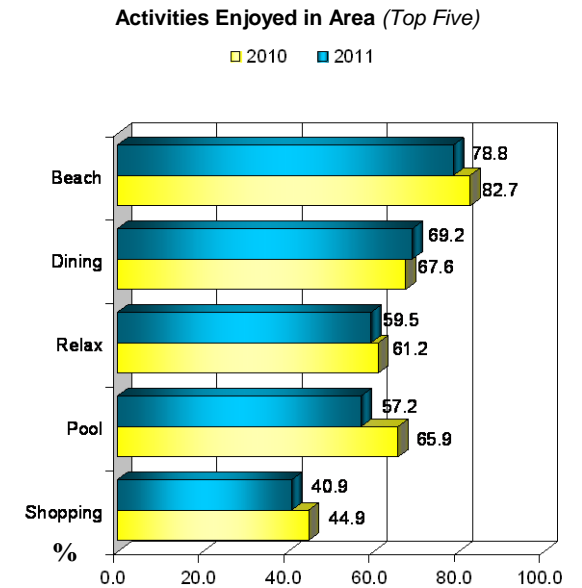
	<u>July 2010</u>	<u>July 2011</u>
Satisfaction with Collier County		
Very Satisfied	85.4%	86.5%
Satisfied	11.1	9.1
Satisfaction Level (<i>Very Satisfied + Satisfied</i>)	96.5%	95.6%

Recommend Collier to Friends/Relatives		
Yes	94.6%	93.6%



Activities Enjoyed in Area (*Multiple Response*)

Beach	82.7%	78.8%
Dining Out	67.6	69.2
Relaxing	61.2	59.5
Pool	65.9	57.2
Shopping	44.9	40.9
Swimming	38.4	35.7
Sightseeing	20.5	25.7
Everglades Adventures/Nature	18.8	22.2
Shelling	14.0	18.4
Reading	15.5	17.0
Sunsets	14.7	15.4
Walking	17.6	13.9
Bars & Nightlife	11.4	11.3
Visit with Friends/Relatives	11.8	10.5
Fishing	9.2	7.7
Boating	10.4	7.1



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

	July 2010	July 2011
Expense Relative to Expectations		
More Expensive	10.7%	6.0%
Less Expensive	6.6	7.9
As Expected	79.5	79.7
Don't Know	3.2	6.4
Plan to Return (% Yes)		
To Local Area	91.2%	91.0%
Next Year <i>(Base: Return to Local Area)</i>	65.2	68.9
Collier Base Budget		
Total	\$1,548	\$1,561
Per Person/Day	469	488
Per Person/Trip	100	106
Avg. Party Budget Breakdown		
Accommodations	\$505	\$528
Food/Entertainment	610	617
Retail	260	268
Average Age Head of Household (Years)		
	46.3	45.6
Median Annual Household Income		
	\$122,643	\$125,983
See/Read/Hear Collier Message (% Yes)		
	36.9%	39.1%
Type of Message Seen (Multiple Response)		
Internet	80.3%	85.4%
Television	35.8	36.2
Magazine	21.1	16.6
Newspaper	13.1	11.0
Travel Guides/Visitor Guides/Brochures	10.1	10.9
Influenced by Collier Message		
<i>(Base: Respondents Reporting See/Read/Hear Message)</i>	33.7%	30.9%

