

# RESEARCH DATA SERVICES, INC.

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

### August 2011 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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## *Naples, Marco Island, Everglades: August 2011 Summary*

### 3. Consumers' Collier brand images include perceptions such as:

- A relaxing, upscale place to vacation.
- Beautiful sunsets.
- Calm water.
- Casual.
- Classy, but friendly.
- Different from other Florida areas.
- Enjoyable restaurants. Eat outside.
- Exceptionally clean and relaxing.
- Exclusive.
- Florida without the hustle/bustle.
- Great for boating.
- Idyllic paradise.
- International -- like being out of the country.
- Lots of shopping/restaurants.
- Lots to do if you want or nothing to do if you choose.
- Natural beauty.
- Not claustrophobic.
- Perfect for families.
- Refreshing.
- Safe place to walk around.
- Scenic.
- Serene.
- Sophisticated, elegant.
- The Everglades.
- Vibrant, something for everyone.

4. Fully 53.4% of August visitors drive to reach the destination **(2010: 51.1%)**. For flyers, Southwest Florida International (RSW) remains the principal airport of deplanement **(2010: 42.4%; 2011: 46.8%)**, with first time visitors more likely to use Miami and Orlando International airports.

5. The Internet is volunteered by 83.5% of August visitors as a travel information source. Dominant URL's include hotel, airline, and destination websites. Some 27.7% of visitors report use of traveler reviews like TripAdvisor and/or social networking sites. Visitors also mention sites such as Expedia, Hotels.com, Orbitz, Travelocity, and VRBO.

6. The vast majority of Collier patrons **(95.0%)** are satisfied with their stay. Fully 87.1% are likely to make a return trip to the Naples, Marco Island, Everglades area.

7. Compared to same month last year, visitors are younger **(2010: 46.1 years of age; 2011: 45.9 years of age)** and control a median household income of \$130,122.

**Naples, Marco Island, Everglades:**  
*August 2011 Visitor Profile*



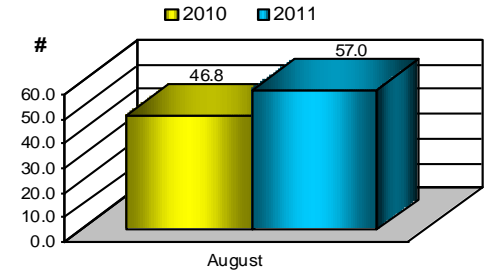
# August 2011 Visitor Profile – Naples, Marco Island, Everglades

| Visitor Volume   | Annual 2010   | Year to Date  |               | % Δ '10/'11 | August       |              | % Δ '10/'11 |
|------------------|---------------|---------------|---------------|-------------|--------------|--------------|-------------|
|                  |               | 2010          | 2011          |             | 2010         | 2011         |             |
| Visitors (#)     | 1,383,500     | 1,002,200     | 1,061,600     | +5.9        | 76,800       | 89,000       | +15.9       |
| Room Nights      | 2,052,310     | 1,475,610     | 1,544,300     | +4.7        | 119,200      | 137,200      | +15.1       |
| Direct Exp. (\$) | \$782,078,400 | \$586,783,900 | \$636,932,200 | +8.5        | \$31,359,000 | \$38,246,900 | +22.0       |

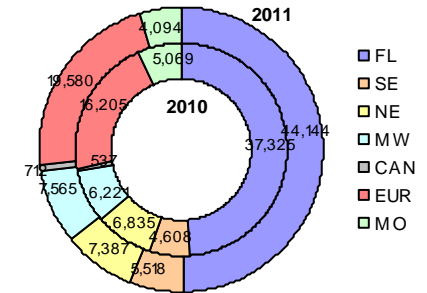
| Visitor Origin  | YTD # of Visitors |                  |             | Rel %        | August # of Visitors |              |               | % Δ '10/'11  |
|-----------------|-------------------|------------------|-------------|--------------|----------------------|--------------|---------------|--------------|
|                 | 2010              | 2011             | % Δ '10/'11 |              | 2010                 | Rel %        | 2011          |              |
| Florida         | 372,060           | 398,684          | +7.2        | 48.6%        | 37,325               | 49.6%        | 44,144        | +18.3        |
| Southeast       | 67,519            | 76,255           | +12.9       | 6.0          | 4,608                | 6.2          | 5,518         | +19.7        |
| Northeast       | 207,628           | 222,867          | +7.3        | 8.9          | 6,835                | 8.3          | 7,387         | +8.1         |
| Midwest         | 162,290           | 168,244          | +3.7        | 8.1          | 6,221                | 8.5          | 7,565         | +21.6        |
| Canada          | 23,789            | 21,927           | -7.8        | 0.7          | 537                  | 0.8          | 712           | +32.6        |
| Europe          | 118,079           | 121,864          | +3.2        | 21.1         | 16,205               | 22.0         | 19,580        | +20.8        |
| Markets of Opp. | 50,835            | 51,759           | +1.8        | 6.6          | 5,069                | 4.6          | 4,094         | -19.2        |
| <b>Total</b>    | <b>1,002,200</b>  | <b>1,061,600</b> | <b>+5.9</b> | <b>100.0</b> | <b>76,800</b>        | <b>100.0</b> | <b>89,000</b> | <b>+15.9</b> |

| 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         | 76.1         | 66.5         | 61.3         | 63.7         | 50.0          |        |         |         |         |
| <b>Δ Pts. ('10/'11)</b> | <b>-1.6</b>  | <b>+2.2</b>  | <b>+5.8</b>  | <b>+0.3</b>  | <b>+4.2</b>  | <b>+3.5</b>  | <b>+3.0</b>  | <b>+6.3</b>   |        |         |         |         |
| 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        | 102.4         |        |         |         |         |
| <b>Δ % ('10/'11)</b>    | <b>-2.1%</b> | <b>+1.4%</b> | <b>+2.0%</b> | <b>+5.9%</b> | <b>+2.9%</b> | <b>+3.6%</b> | <b>+4.4%</b> | <b>+8.0%</b>  |        |         |         |         |
| 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         | 51.2          |        |         |         |         |
| <b>Δ % ('10/'11)</b>    | <b>-4.4%</b> | <b>+4.1%</b> | <b>+9.2%</b> | <b>+6.2%</b> | <b>+9.8%</b> | <b>+9.9%</b> | <b>+9.5%</b> | <b>+23.7%</b> |        |         |         |         |

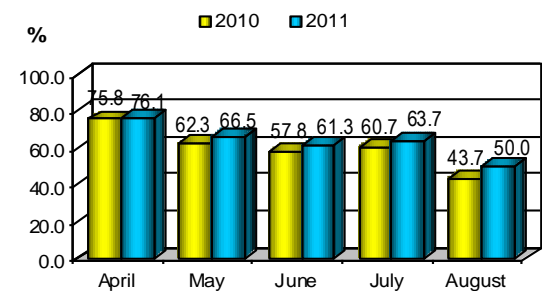
August Economic Impact (in Millions)



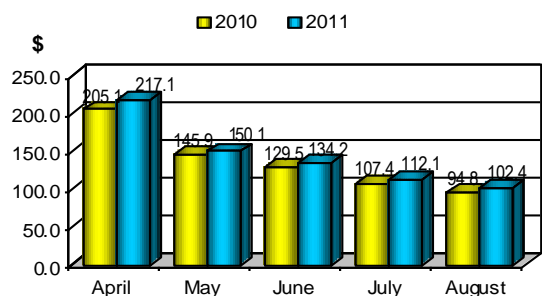
August Visitor Origins



Occupancy

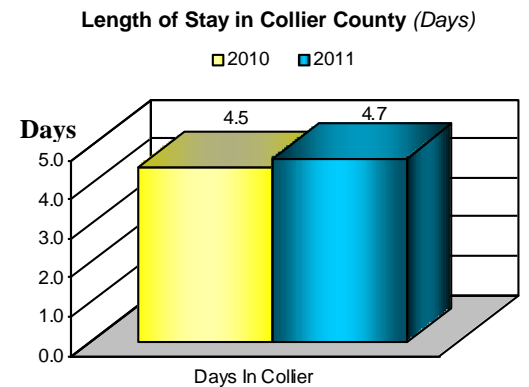
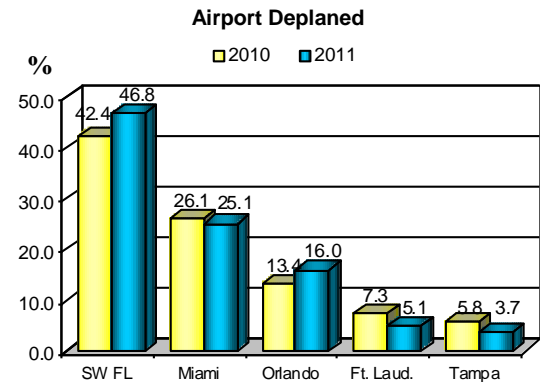
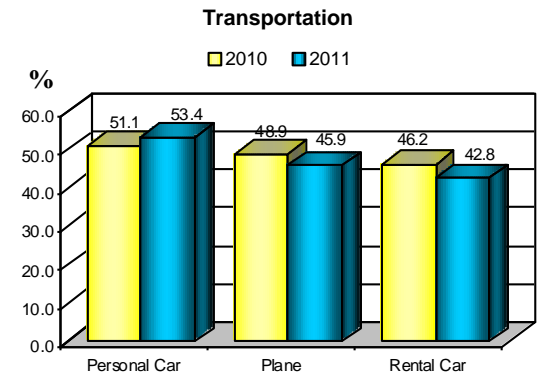


Room Rates



# August 2011 Visitor Profile -- Naples, Marco Island, Everglades

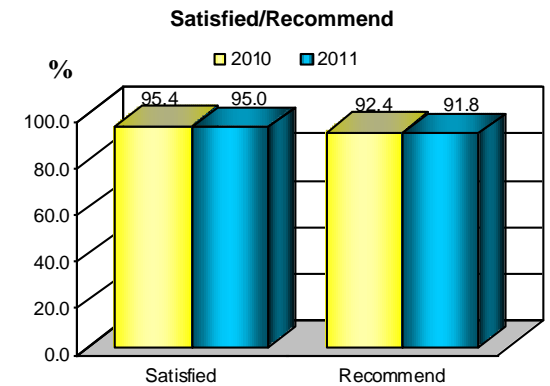
|   | <u>August 2010</u> | <u>August 2011</u> |
|---|--------------------|--------------------|
| <b>Transportation Mode</b><br>(Multiple Response)   |                    |                    |
| Personal Car  | 51.1%              | 53.4%              |
| Plane   | 48.9               | 45.9               |
| Rental Car  | 46.2               | 42.8               |
| <b>Airport Deplaned</b> (Base: Flew)                |                    |                    |
| Southwest Florida International                     | 42.4%              | 46.8%              |
| Miami International                                 | 26.1               | 25.1               |
| Orlando International/Sanford                       | 13.4               | 16.0               |
| Fort Lauderdale International                       | 7.3                | 5.1                |
| Tampa International                                 | 5.8                | 3.7                |
| <b>Purpose of Trip</b> (Multiple Response)          |                    |                    |
| Vacation  | 74.5%              | 72.5%              |
| Conferences/Business Meetings                       | 10.5               | 14.9               |
| Business Travelers                                  | 12.2               | 12.7               |
| Visit with Friends and Relatives                    | 8.4                | 8.1                |
| <b>First Visit to Collier County</b> (% Yes)        | 39.0%              | 41.7%              |
| <b>First Visit to Florida</b> (% Yes)               | 8.5%               | 9.7%               |
| <b>Length of Stay in Collier County</b> (# of days) | 4.5 days           | 4.7 days           |
| <b>Party Size</b> (# of People)                     | 2.7 people         | 2.8 people         |
| <b>Party Composition</b> (Multiple Response)        |                    |                    |
| Family  | 46.6%              | 46.2%              |
| Couple  | 38.4               | 41.0               |
| Group of Friends                                    | 4.2                | 7.8                |
| Single  | 7.5                | 7.7                |



## August 2011 Visitor Profile -- Naples, Marco Island, Everglades

|   | <u>August 2010</u> | <u>August 2011</u> |
|---|--------------------|--------------------|
| <b>Satisfaction with Collier County</b>                         |                    |                    |
| Very Satisfied  | 78.6%              | 79.7%              |
| Satisfied   | 16.8               | 15.3               |
| <b>Satisfaction Level</b> ( <i>Very Satisfied + Satisfied</i> ) | <b>95.4%</b>       | <b>95.0%</b>       |

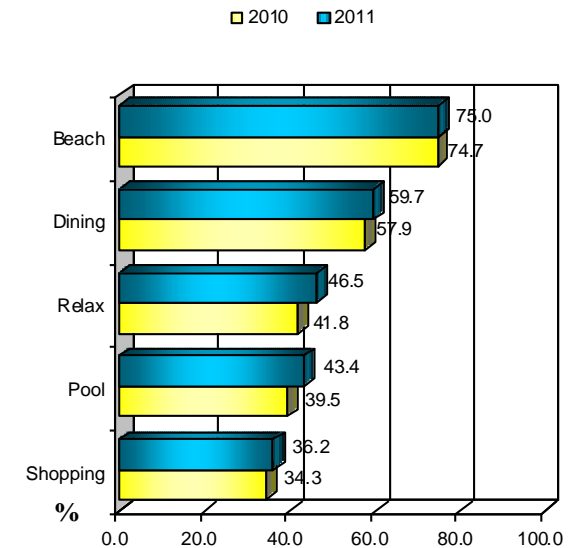
|   |       |       |
|---|-------|-------|
| <b>Recommend Collier to Friends/Relatives</b> |       |       |
| Yes   | 92.4% | 91.8% |



### Activities Enjoyed in Area (*Multiple Response*)

|  |       |       |
|--|-------|-------|
| Beach                                    | 74.7% | 75.0% |
| Dining Out                               | 57.9  | 59.7  |
| Relaxing                                 | 41.8  | 46.5  |
| Pool                                     | 39.5  | 43.4  |
| Shopping                                 | 34.3  | 36.2  |
| Sightseeing                              | 15.7  | 20.2  |
| Sunsets                                  | 15.0  | 19.6  |
| Swimming                                 | 16.4  | 18.8  |
| Enjoying Nature/Bird Watching/Everglades | 14.5  | 17.1  |

### Activities Enjoyed in Area (*Top Five*)

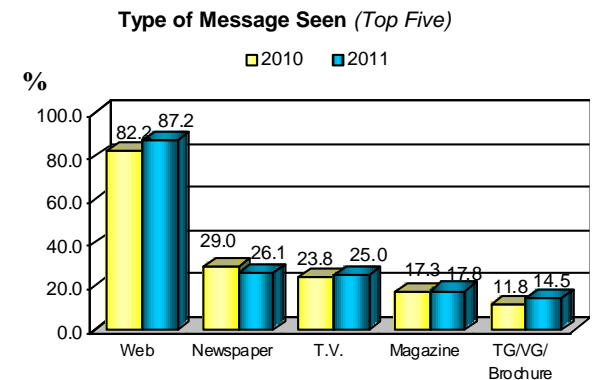
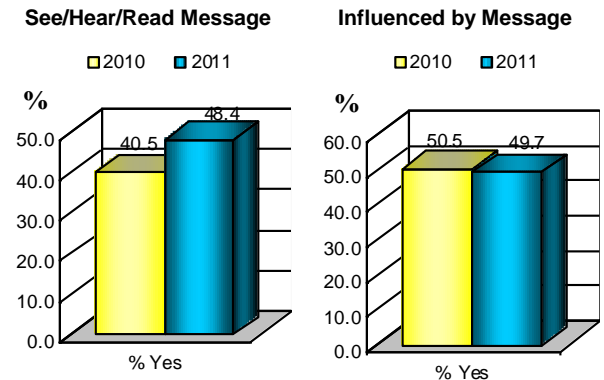
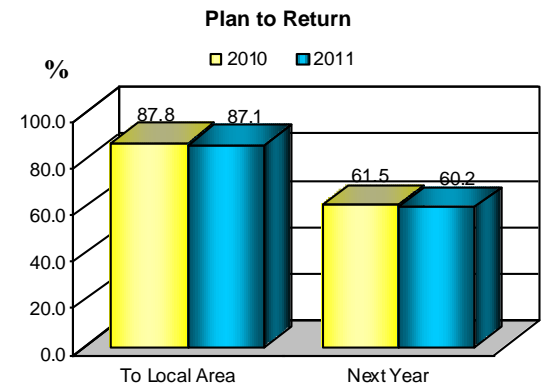


### Why Chose the Area (2011) (*Multiple Response*)

|                                 |       |
|---------------------------------|-------|
| Beach Area                      | 65.2% |
| Quiet/Peaceful/Laid Back        | 50.4  |
| Not Crowded                     | 35.0  |
| Quality of Hotel/Accommodations | 28.6  |
| Outdoor Recreation/Nature       | 22.6  |
| Convenient Location             | 22.5  |
| Business/Meeting/Conference     | 18.8  |
| Appealing Brochures/Websites    | 17.6  |

# August 2011 Visitor Profile -- Naples, Marco Island, Everglades

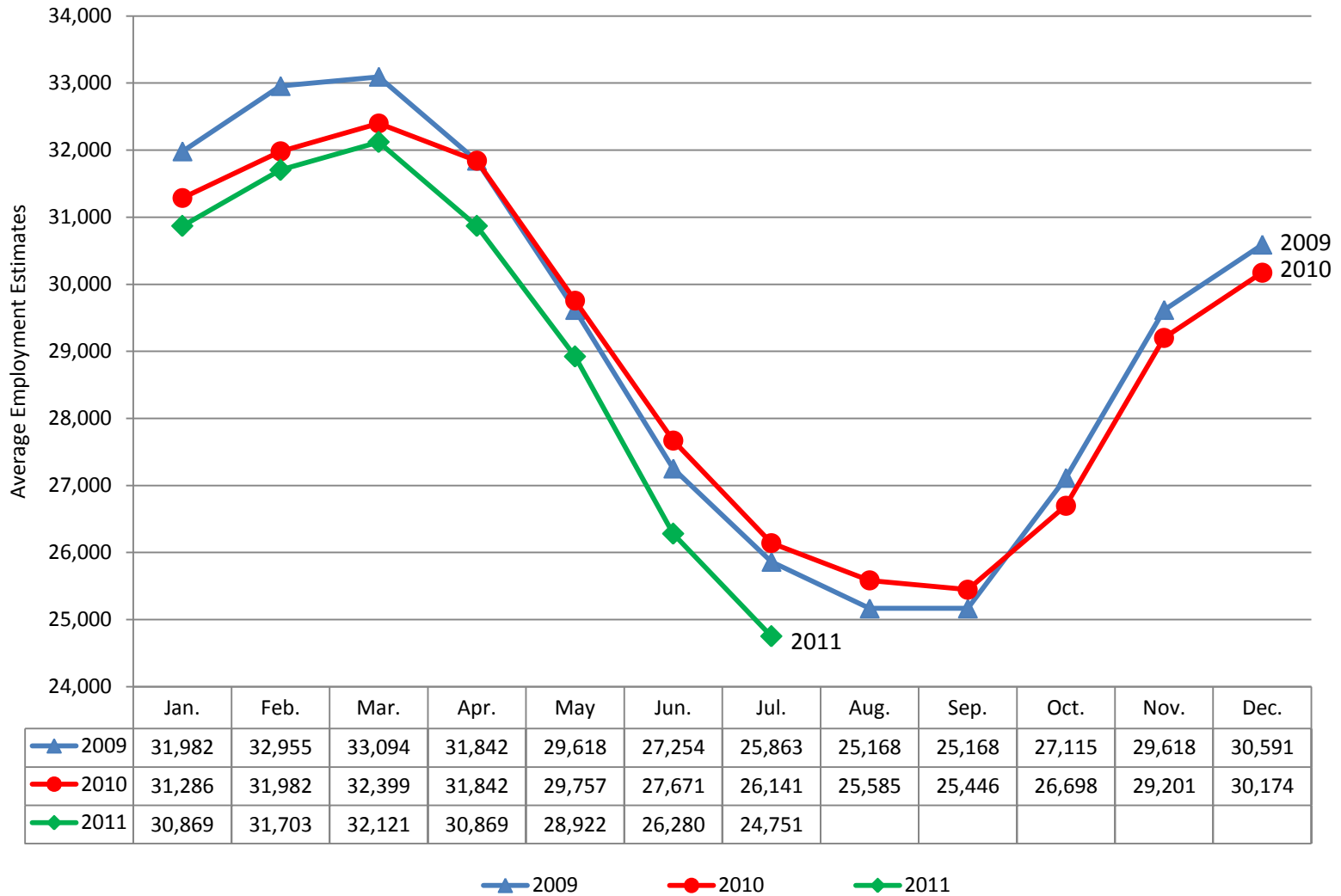
|   | August 2010 | August 2011 |
|---|-------------|-------------|
| <b>Expense Relative to Expectations</b>             |             |             |
| More Expensive                                      | 10.2%       | 9.8%        |
| Less Expensive                                      | 6.8         | 3.6         |
| As Expected   | 75.8        | 75.6        |
| Don't Know  | 7.2         | 11.0        |
| <b>Plan to Return (% Yes)</b>                       |             |             |
| To Local Area                                       | 87.8%       | 87.1%       |
| Next Year (Base: Return to Local Area)              | 61.5        | 60.2        |
| <b>Collier Base Budget</b>                          |             |             |
| Total   | \$1,102.46  | \$1,203.28  |
| Per Person/Day                                      | 408.32      | 429.74      |
| Per Person/Trip                                     | 90.74       | 91.44       |
| <b>Avg. Party Budget Breakdown</b>                  |             |             |
| Accommodations                                      | \$455.70    | \$509.94    |
| Food/Entertainment                                  | 539.32      | 564.40      |
| Retail  | 97.99       | 126.45      |
| <b>Average Age Head of Household (Years)</b>        |             |             |
|   | 46.1        | 45.9        |
| <b>Median Annual Household Income</b>               |             |             |
|   | \$136,154   | \$130,122   |
| <b>See/Read/Hear Collier Message (% Yes)</b>        |             |             |
|   | 40.5%       | 48.4%       |
| <b>Type of Message Seen (Multiple Response)</b>     |             |             |
| Internet  | 82.2%       | 87.2%       |
| Newspaper   | 29.0        | 26.1        |
| Television  | 23.8        | 25.0        |
| Magazine  | 17.3        | 17.8        |
| Travel Guides/Visitor Guides/Brochures              | 11.8        | 14.5        |
| <b>Influenced by Collier Message</b>                |             |             |
| (Base: Respondents Reporting See/Read/Hear Message) | 50.5%       | 49.7%       |



## Employment Data: 2009 – 2011



Collier Estimated Average Direct and Indirect Tourism Sector Related Employment \*



\* Estimates based on data from the Florida Agency for Workforce Innovation, Labor Market Statistics Center, Current Employment Statistics Program (in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics).