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

### September 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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October 24, 2011

*Executive Summary: September 2011*

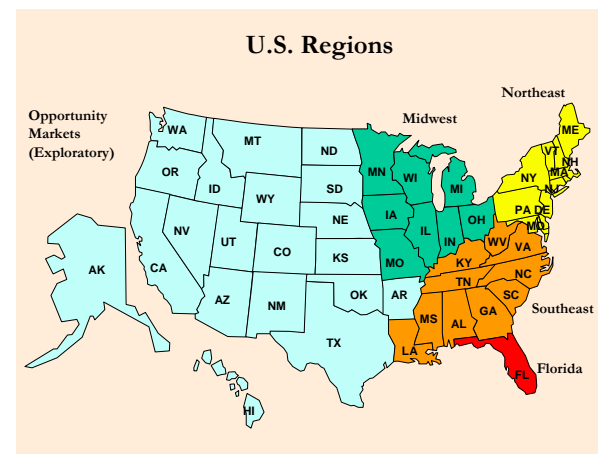
- Collier's forward-looking tourism reservation barometer projects continued visitation growth over the next three months:

<b>% of Properties</b>			
<b><u>Reporting Reservations:</u></b>	<b><u>2009</u></b>	<b><u>2010</u></b>	<b><u>2011</u></b>
Up	13.8%	23.3%	48.6%
The Same	24.1	16.7	20.0
Down	55.2	50.0	22.9

- In September, visitor spending equaled \$47.1 million of economic impact on the County (+24.9%). Concomitantly, ADR rose by 1.5%, while occupancy surged by +18.5%. This month, some 70,700 visitors traveled to the destination (+17.6).

- Key origin segments are as follows:

<b><u>September Visitation</u></b>	<b><u>2010 Visitor #</u></b>	<b><u>2011 Visitor #</u></b>	<b><u>% Δ</u></b>
Florida	27,886	33,229	+19.2
Southeast	4,207	4,807	+14.3
Northeast	6,671	7,141	+7.0
Midwest	5,229	5,656	+8.2
Canada	781	1,202	+53.9
Europe	11,780	15,059	+27.8
Mkts. of Opp.	3,546	3,606	+1.7
<b>Total</b>	<b>60,100</b>	<b>70,700</b>	<b>+17.6</b>



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

4. The images and perceptions held by visitors about the Naples, Marco Island, Everglades area are intriguing:
  - A wonderful peaceful little piece of "heaven".
  - Beachy.
  - Beautiful region.
  - Breathtaking phenomenal sunsets.
  - Charming.
  - Easy to get to and everything is at your fingertips.
  - Eclectic.
  - Feels like home.
  - Friendly, safe, fairly expensive.
  - Great get away area!
  - Idyllic, affluent, welcoming.
  - Interesting area, beautiful coastline and beaches, good facilities.
  - Island-like.
  - Love it – our favorite spot in Florida.
  - Marco Island is such a popular site we are going back in 2012.
  - Nice clean beaches.
  - Not that much to do for kids.
  - Not too commercial.
  - Peaceful, family-oriented.
  - Quiet, laidback.
  - Relaxing, comfortable.
  - Small but offers everything.
  - Spectacular, pure serenity.
  - The most beautiful relaxing vacation I have ever taken.
  - Touristy.
  - Upscale lifestyle.
  - We found Marco Island to be everything we'd hoped it would be.
  - Wonderful, nothing beats Naples.
5. The typical visitor is 47.5 years of age and commands a median household income of \$144,080.
6. A majority (**50.9%**) of September visitors drive to reach the destination (**2010: 48.6%**). For visitors who flew, Southwest Florida International remains the primary airport of choice (**55.7%**), followed by Miami International (**24.2%**), and Orlando International/Sanford (**11.6%**).
7. The Internet is cited by 86.3% as a principal source of information for their stay. Websites most frequently mentioned are hotel, airline, and destination sites. Fully 28.3% consult traveler reviews such as TripAdvisor as well as the social networking of Facebook and Twitter. Expedia, Hotels.com, Travelocity, and Orbitz are also mentioned.
8. Some 91.8% of our patrons are satisfied with their current stay in the destination and fully 83.0% plan to return to the Naples, Marco Island, Everglades area.

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

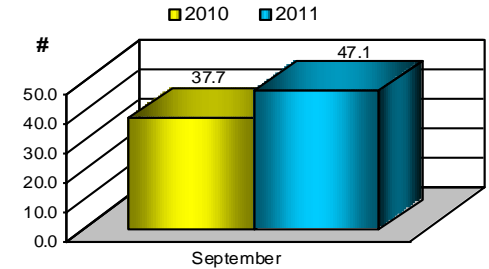


# September 2011 Visitor Profile – Naples, Marco Island, Everglades

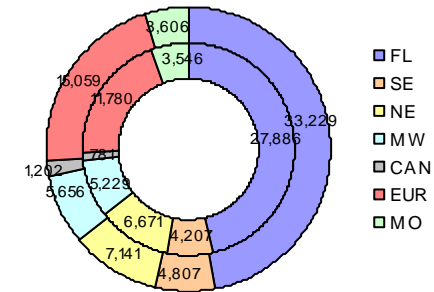
Visitor Volume	Annual 2010	Year to Date		% Δ '10/'11	September		% Δ '10/'11
		2010	2011		2010	2011	
Visitors (#)	1,383,500	1,062,300	1,132,300	+6.6	60,100	70,700	+17.6
Room Nights	2,052,310	1,584,110	1,673,600	+5.6	108,500	129,300	+19.2
Direct Exp. (\$)	\$782,078,400	\$612,098,000	\$668,550,000	+9.2	\$25,314,100	\$31,617,800	+24.9

Visitor Origin	YTD # of Visitors			% Δ '10/'11	September # of Visitors			
	2010	2011	Rel %		2010	Rel %	2011	% Δ '10/'11
Florida	399,946	431,913	+8.0	46.4%	27,886	47.0%	33,229	+19.2
Southeast	71,726	81,062	+13.0	7.0	4,207	6.8	4,807	+14.3
Northeast	214,299	230,008	+7.3	11.1	6,671	10.1	7,141	+7.0
Midwest	167,519	173,900	+3.8	8.7	5,229	8.0	5,656	+8.2
Canada	24,570	23,129	-5.9	1.3	781	1.7	1,202	+53.9
Europe	129,859	136,923	+5.4	19.6	11,780	21.3	15,059	+27.8
Markets of Opp.	54,381	55,365	+1.8	5.9	3,546	5.1	3,606	+1.7
<b>Total</b>	<b>1,062,300</b>	<b>1,132,300</b>	<b>+6.6</b>	<b>100.0</b>	<b>60,100</b>	<b>100.0</b>	<b>70,700</b>	<b>+17.6</b>

September Economic Impact (in Millions)

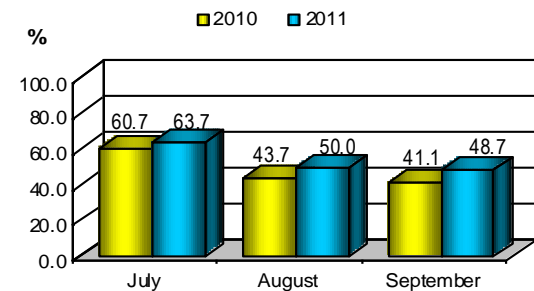


September Visitor Origins

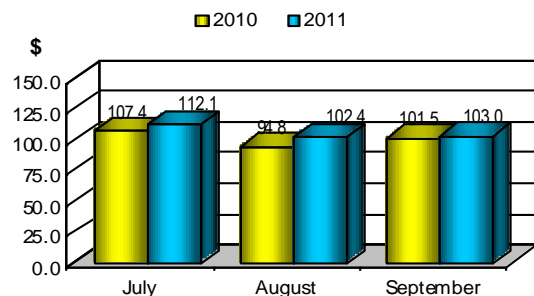


Occupancy	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
Occ. 2010	61.2%	78.3%	80.3%	70.6%	60.9%	55.9%	63.6%	45.7%	41.9%	51.8%	59.3%	60.4%
Occ. 2011	68.0	81.6	83.3	75.8	62.3	57.8	60.7	43.7	41.1	58.8	60.6	58.9
Occ. 2011	66.4	83.8	89.1	76.1	66.5	61.3	63.7	50.0	48.7			
<b>Δ Pts. ('10/'11)</b>	<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>	<b>+7.6</b>			
ADR 2010	\$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 2011	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	103.0			
<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>	<b>+1.5%</b>			
RevPAR 2010	\$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 2011	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	50.2			
<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>	<b>+20.4%</b>			

Occupancy

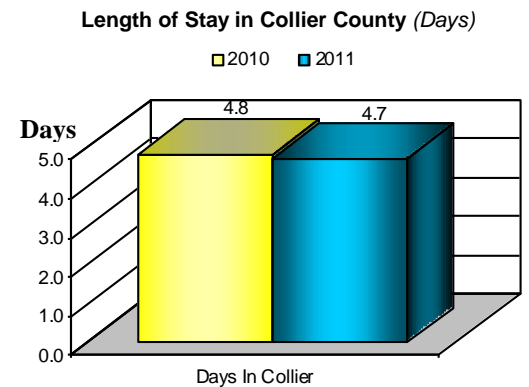
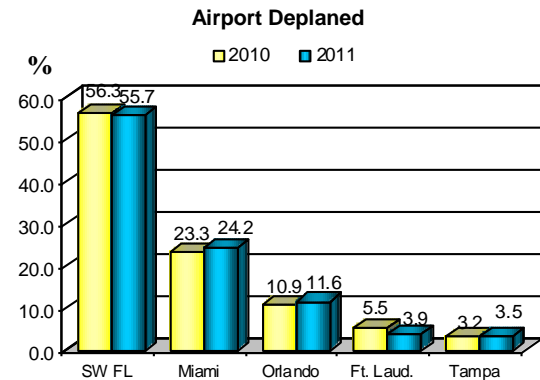
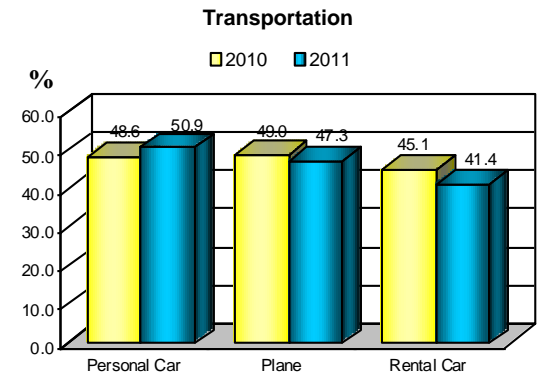


Room Rates



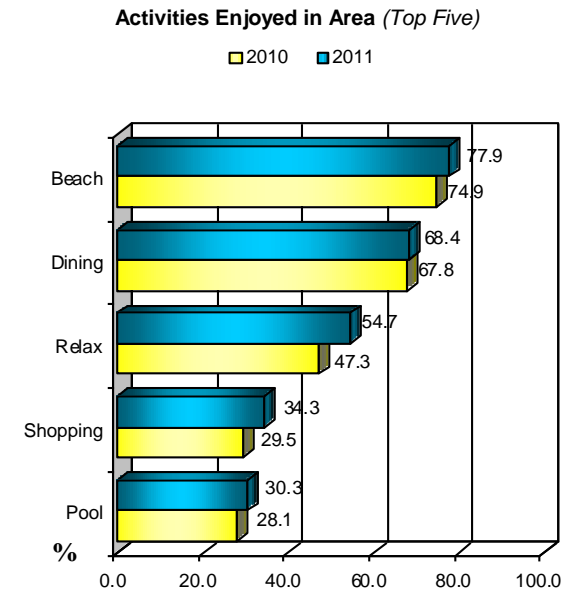
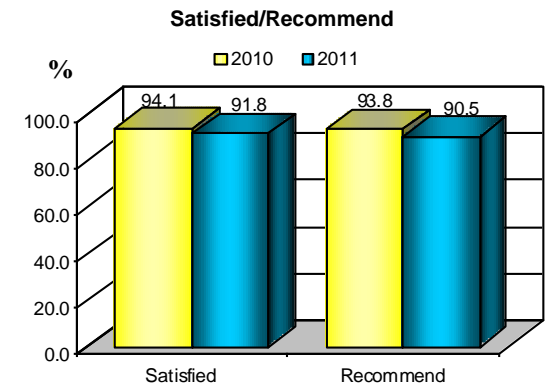
# September 2011 Visitor Profile -- Naples, Marco Island, Everglades

	<u>September 2010</u>	<u>September 2011</u>
<b>Transportation Mode</b> <i>(Multiple Response)</i>		
Personal Car	48.6%	50.9%
Plane	49.0	47.3
Rental Car	45.1	41.4
<b>Airport Deplaned</b> <i>(Base: Flew)</i>		
Southwest Florida International	56.3%	55.7%
Miami International	23.3	24.2
Orlando International/Sanford	10.9	11.6
Fort Lauderdale International	5.5	3.9
Tampa International	3.2	3.5
<b>Purpose of Trip</b> <i>(Multiple Response)</i>		
Vacation	77.9%	74.3%
Conferences/Business Meetings	13.5	19.8
Special Event	7.0	11.4
Business Travelers	10.2	8.3
Wedding/Honeymoon	6.2	6.5
Visit with Friends and Relatives	5.9	6.5
<b>First Visit to Collier County</b> (% Yes)	33.6%	38.2%
<b>First Visit to Florida</b> (% Yes)	6.7%	6.9%
<b>Length of Stay in Collier County</b> (# of days)	4.8 days	4.7 days
<b>Party Size</b> (# of People)	2.4 people	2.3 people
<b>Party Composition</b> <i>(Multiple Response)</i>		
Couple	59.0%	56.5%
Family	30.8	31.1
Single	7.6	6.4
Group of Friends	6.2	5.7



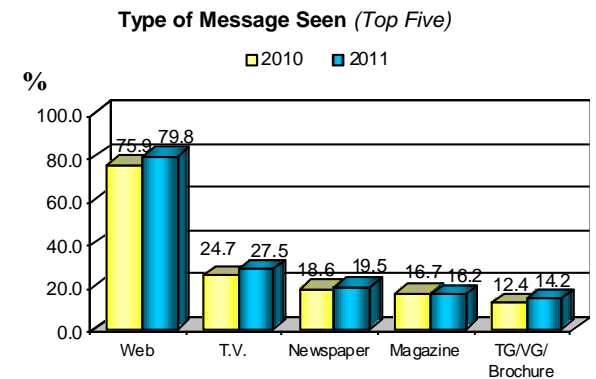
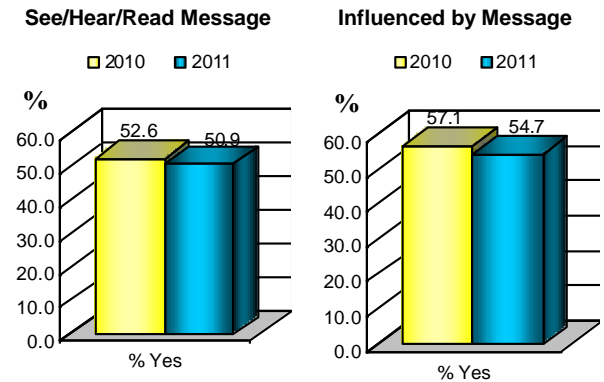
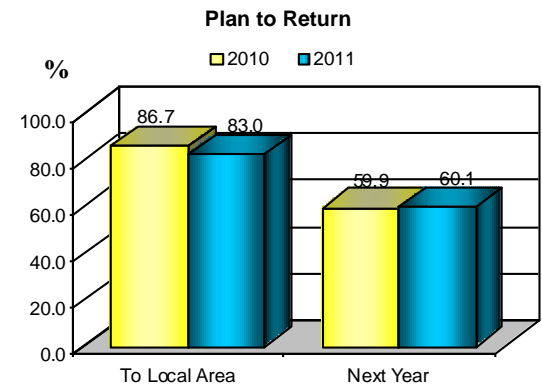
## September 2011 Visitor Profile -- Naples, Marco Island, Everglades

	<u>September 2010</u>	<u>September 2011</u>
<b>Satisfaction with Collier County</b>		
Very Satisfied	85.7%	85.7%
Satisfied	8.4	6.1
<b>Satisfaction Level</b> ( <i>Very Satisfied + Satisfied</i> )	<b>94.1%</b>	<b>91.8%</b>
<b>Recommend Collier to Friends/Relatives</b>		
Yes	93.8%	90.5%
<b>Activities Enjoyed in Area</b> ( <i>Multiple Response</i> )		
Beach	74.9%	77.9%
Dining Out	67.8	68.4
Relaxing	47.3	54.7
Shopping	29.5	34.3
Pool	28.1	30.3
Sunning	17.5	25.6
Sunsets	19.0	22.0
Sightseeing	17.6	20.0
Reading	19.0	18.3
Swimming	17.5	17.7
Bars/Nightlife	16.2	17.5
Walking	14.1	16.7
Enjoying Nature/Bird Watching/Everglades	14.8	15.5
<b>Why Chose the Area (2011)</b> ( <i>Multiple Response</i> )		
Beach Area		62.2%
Quiet/Peaceful/Laid Back		49.4
Relaxing		47.2
Weather		45.9
Previous Experience		38.7
Not Crowded		37.4
Quality of Hotel/Accommodations		30.8
Outdoor Recreation/Nature		28.2
Never Been/Wanted to Try Something New		26.9
Proximate Location		24.3
Restaurants		23.3
Business/Meeting/Conference		22.2
Appealing Brochures/Websites		21.6
Recommendation		20.4



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

	<u>September 2010</u>	<u>September 2011</u>
<b>Expense Relative to Expectations</b>		
More Expensive	10.7%	7.2%
Less Expensive	4.8	2.5
As Expected	78.9	82.7
Don't Know	5.6	7.6
<b>Plan to Return (% Yes)</b>		
To Local Area	86.7%	83.0%
Next Year (Base: Return to Local Area)	59.9	60.1
<b>Collier Base Budget</b>		
Total	\$1,010.88	\$1,028.58
Per Person/Day	421.20	447.21
Per Person/Trip	87.75	95.15
<b>Avg. Party Budget Breakdown</b>		
Accommodations	\$396.22	\$410.78
Food/Entertainment	407.73	421.03
Retail	147.77	162.61
<b>Average Age Head of Household (Years)</b>		
	48.1	47.5
<b>Median Annual Household Income</b>		
	\$141,038	\$144,080
<b>See/Read/Hear Collier Message (% Yes)</b>		
	52.6%	50.9%
<b>Type of Message Seen (Multiple Response)</b>		
Internet	75.9%	79.8%
Television	24.7	27.5
Newspaper	18.6	19.5
Magazine	16.7	16.2
Travel Guides/Visitor Guides/Brochures	12.4	14.2
<b>Influenced by Collier Message</b>		
(Base: Respondents Reporting See/Read/Hear Message)	57.1%	54.7%

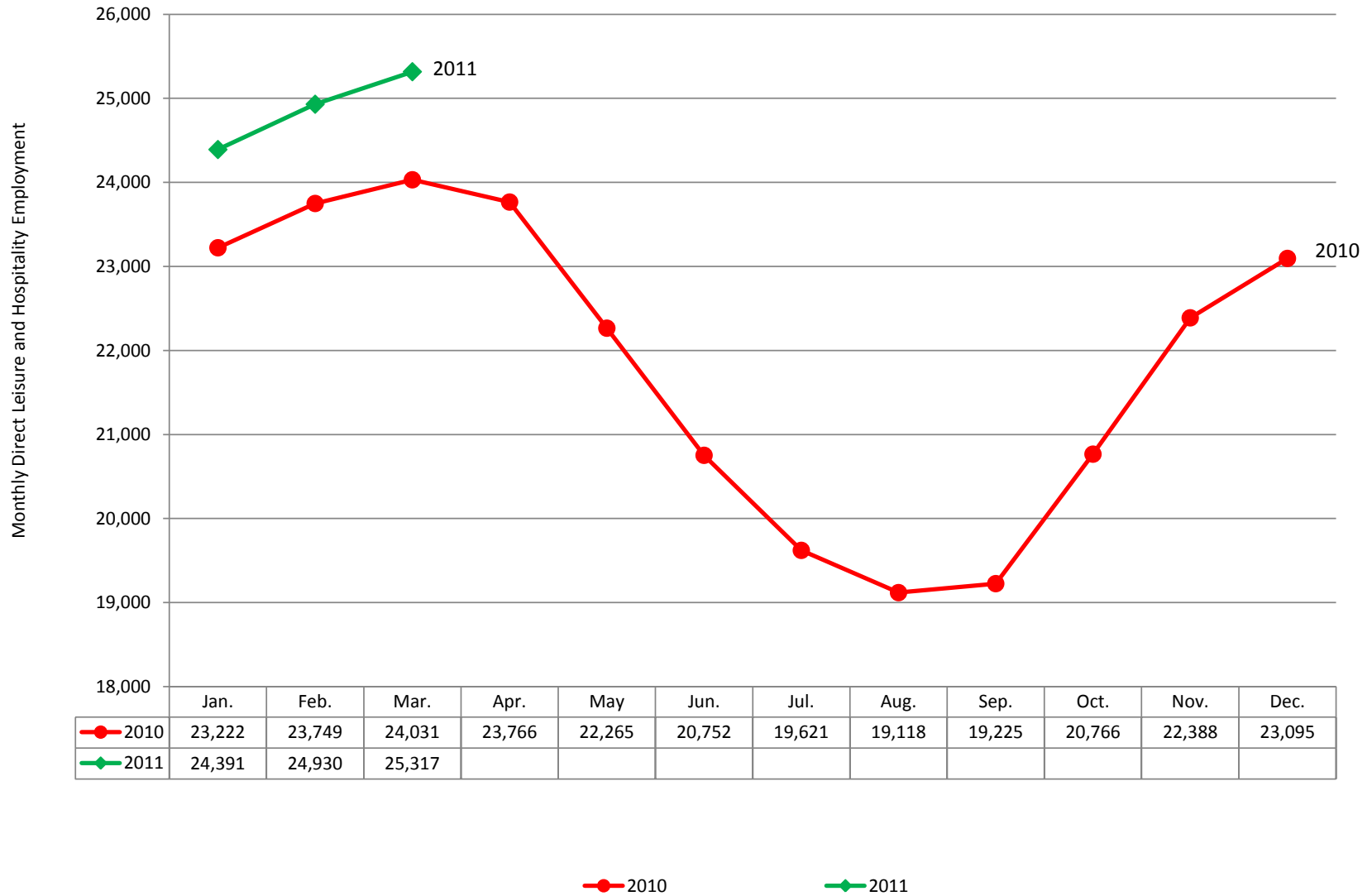


## Employment Data: 2009 – 2011



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

Collier Direct Leisure and Hospitality Employment \*



\* Source: Florida Department of Economic Opportunity, Labor Market Information, Quarterly Census of Employment and Wages Program (QCEW), Collier County Leisure and Hospitality Sector. 2011 First Quarter Data Released October 2011.