

# International Representation



- **Time Line**
  - 2006-2008 Part Time Representation in UK & Germany
  - 2009 BCC Approved Funding for Full Time International Representation
  - 2012 Intent to Bid Process (ITB 12-5893) for International Representation
- **Countries Included Our Top Feeder Markets**
  - UK/Ireland
  - Germany & Central Europe
- **Cost**
  - UK/Ireland \$120,000 Fee; \$80,000 Reimbursable Expenses
  - Germany \$102,000 Fee; \$98,000 Reimbursable Expenses

# International Marketing Analytics

- **International Visitation has grown each year with International Representation**
  - 2006            138,859            10%
  - 2007            141,400            11%
  - 2008            187,790            12%
  - 2009            182,064            12%
  - 2010            185,672            12%
  - 2011            203,694            13.6%
- **Marketing Cost vs. Direct Intl. Visitor Spending in 2011**
  - \$16,538,800 Intl. Visitor Spending
  - ROI of \$45 for each marketing dollar invested
- **# Collier Properties Included in Tour Operator Programs has grown each year since 2006**
  - Average of three properties per operator in 2002
  - Average of 8 properties per operator in 2011

# International Analytics Cont.

- **Hotel Room Night Production in 2011:**
  - UK 38,129
  - Germany 28,809
  - Total Intl. Room Nights: 66,938
- **Results from Tour Operators in 2012 to date**
  - Collier properties # 1 or # 2 in advanced reservations
  - Naples leads all Tour Operator room night production:
    - Virgin Holidays, Bon Voyage in UK
    - DERTOUR in Germany
  - UK Average length of stay grew from 4 to 7 Nights in 2011 due to co-op activities with tour operators
  - 21 Collier hotels benefit from International visitors

**Collier County European Visitation Data: Calendar Year 2006 - 2011**

2006															
Collier County	First Quarter			Second Quarter			Third Quarter			Fourth Quarter			Calendar Year		
	% Share	# of Vis.	% Δ '05-'06	% Share	# of Vis.	% Δ '05-'06	% Share	# of Vis.	% Δ '05-'06	% Share	# of Vis.	% Δ '05-'06	% Share	# of Vis.	% Δ '05-'06
	Central Europe	30.6	12,229	-15.3%	37.6	12,124	-19.1%	39.8	11,124	+8.5%	33.8	13,080	+16.3%	35.0	48,557
U.K.	55.0	21,980	-34.2%	51.2	16,510	-16.7%	45.9	12,830	-9.8%	52.1	20,162	-4.1%	51.5	71,482	-19.2%
Other	14.4	5,755	-7.5%	11.2	3,612	+78.4%	14.3	3,997	-8.9%	14.1	5,456	+25.2%	13.6	18,820	+10.8%
<b>Total European Markets</b>	<b>100.0</b>	<b>39,964</b>	<b>-26.1%</b>	<b>100.0</b>	<b>32,246</b>	<b>-12.4%</b>	<b>100.0</b>	<b>27,951</b>	<b>-3.2%</b>	<b>100.0</b>	<b>38,698</b>	<b>+5.7%</b>	<b>100.0</b>	<b>138,859</b>	<b>-11.2%</b>

2007															
Collier County	First Quarter			Second Quarter			Third Quarter			Fourth Quarter			Calendar Year		
	% Share	# of Vis.	% Δ '06-'07	% Share	# of Vis.	% Δ '06-'07	% Share	# of Vis.	% Δ '06-'07	% Share	# of Vis.	% Δ '06-'07	% Share	# of Vis.	% Δ '06-'07
	Central Europe	32.6	13,500	+10.4%	38.6	11,882	-2.0%	37.0	10,516	-5.5%	33.5	13,663	+4.5%	35.1	49,561
U.K.	51.2	21,202	-3.5%	48.7	14,991	-9.2%	46.9	13,330	+3.9%	51.0	20,800	+3.2%	49.7	70,323	-1.6%
Other	16.2	6,708	+16.6%	12.7	3,910	+8.3%	16.1	4,576	+14.5%	15.5	6,322	+15.9%	15.2	21,516	+14.3%
<b>Total European Markets</b>	<b>100.0</b>	<b>41,410</b>	<b>+3.6%</b>	<b>100.0</b>	<b>30,783</b>	<b>-4.5%</b>	<b>100.0</b>	<b>28,422</b>	<b>+1.7%</b>	<b>100.0</b>	<b>40,785</b>	<b>+5.4%</b>	<b>100.0</b>	<b>141,400</b>	<b>+1.8%</b>

2008															
Collier County	First Quarter			Second Quarter			Third Quarter			Fourth Quarter			Calendar Year		
	% Share	# of Vis.	% Δ '07-'08	% Share	# of Vis.	% Δ '07-'08	% Share	# of Vis.	% Δ '07-'08	% Share	# of Vis.	% Δ '07-'08	% Share	# of Vis.	% Δ '07-'08
	Central Europe	32.1	14,673	+8.7%	36.8	13,816	+16.3%	40.1	17,035	+62.0%	35.7	22,154	+62.1%	36.0	67,678
U.K.	50.9	23,266	+9.7%	46.7	17,532	+17.0%	43.6	18,522	+38.9%	50.8	31,525	+51.6%	48.4	90,845	+29.2%
Other	17.0	7,770	+15.8%	16.5	6,195	+58.4%	16.3	6,924	+51.3%	13.5	8,378	+32.5%	15.6	29,267	+36.0%
<b>Total European Markets</b>	<b>100.0</b>	<b>45,709</b>	<b>+10.4%</b>	<b>100.0</b>	<b>37,543</b>	<b>+22.0%</b>	<b>100.0</b>	<b>42,481</b>	<b>+49.5%</b>	<b>100.0</b>	<b>62,057</b>	<b>+52.2%</b>	<b>100.0</b>	<b>187,790</b>	<b>+32.8%</b>

**Collier County European Visitation Data: Calendar Year 2006 - 2011**

<b>2009</b>															
<b>Collier County</b>	<b>First Quarter</b>			<b>Second Quarter</b>			<b>Third Quarter</b>			<b>Fourth Quarter</b>			<b>Calendar Year</b>		
	% Share	# of Vis.	% Δ '08-'09	% Share	# of Vis.	% Δ '08-'09	% Share	# of Vis.	% Δ '08-'09	% Share	# of Vis.	% Δ '08-'09	% Share	# of Vis.	% Δ '08-'09
Central Europe	37.6	17,970	+22.5%	38.5	14,814	+7.2%	38.9	16,263	-4.5%	38.4	20,730	-6.4%	38.3	69,777	+3.1%
U.K.	47.3	22,606	-2.8%	47.2	18,162	+3.6%	45.0	18,813	+1.6%	48.4	26,129	-17.1%	47.1	85,710	-5.7%
Other	15.1	7,217	-7.1%	14.3	5,503	-11.2%	16.1	6,731	-2.8%	13.2	7,126	-14.9%	14.6	26,577	-9.2%
<b>Total European Markets</b>	<b>100.0</b>	<b>47,793</b>	<b>+4.6%</b>	<b>100.0</b>	<b>38,479</b>	<b>+2.5%</b>	<b>100.0</b>	<b>41,807</b>	<b>-1.6%</b>	<b>100.0</b>	<b>53,985</b>	<b>-13.0%</b>	<b>100.0</b>	<b>182,064</b>	<b>-3.0%</b>

<b>2010</b>															
<b>Collier County</b>	<b>First Quarter</b>			<b>Second Quarter</b>			<b>Third Quarter</b>			<b>Fourth Quarter</b>			<b>Calendar Year</b>		
	% Share	# of Vis.	% Δ '09-'10	% Share	# of Vis.	% Δ '09-'10	% Share	# of Vis.	% Δ '09-'10	% Share	# of Vis.	% Δ '09-'10	% Share	# of Vis.	% Δ '09-'10
Central Europe	35.7	18,064	+0.5%	40.4	15,441	+4.2%	39.2	16,088	-1.1%	40.1	22,381	+8.0%	38.8	71,974	+3.1%
U.K.	47.9	24,236	+7.2%	43.9	16,779	-7.6%	43.3	17,771	-5.5%	45.9	25,618	-2.0%	45.4	84,404	-1.5%
Other	16.4	8,298	+15.0%	15.7	6,000	+9.0%	17.5	7,182	+6.7%	14.0	7,814	+9.7%	15.8	29,294	+10.2%
<b>Total European Markets</b>	<b>100.0</b>	<b>50,598</b>	<b>+5.9%</b>	<b>100.0</b>	<b>38,220</b>	<b>-0.7%</b>	<b>100.0</b>	<b>41,041</b>	<b>-1.8%</b>	<b>100.0</b>	<b>55,813</b>	<b>+3.4%</b>	<b>100.0</b>	<b>185,672</b>	<b>+2.0%</b>

<b>2011</b>															
<b>Collier County</b>	<b>First Quarter</b>			<b>Second Quarter</b>			<b>Third Quarter</b>			<b>Fourth Quarter</b>			<b>Calendar Year</b>		
	% Share	# of Vis.	% Δ '10-'11	% Share	# of Vis.	% Δ '10-'11	% Share	# of Vis.	% Δ '10-'11	% Share	# of Vis.	% Δ '10-'11	% Share	# of Vis.	% Δ '10-'11
Central Europe	38.3	17,935	-0.7%	42.2	17,095	+10.7%	38.5	19,090	+18.7%	42.2	28,177	+25.9%	40.4	82,297	+14.3%
U.K.	46.8	21,916	-9.6%	41.6	16,852	+0.4%	43.1	21,371	+20.3%	43.5	29,046	+13.4%	43.8	89,185	+5.7%
Other	14.9	6,977	-15.9%	16.2	6,563	+9.4%	18.4	9,124	+27.0%	14.3	9,548	+22.2%	15.8	32,212	+10.0%
<b>Total European Markets</b>	<b>100.0</b>	<b>46,828</b>	<b>-7.5%</b>	<b>100.0</b>	<b>40,510</b>	<b>+6.0%</b>	<b>100.0</b>	<b>49,585</b>	<b>+20.8%</b>	<b>100.0</b>	<b>66,771</b>	<b>+19.6%</b>	<b>100.0</b>	<b>203,694</b>	<b>+9.7%</b>