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Naples, Marco Island, Everglades Convention and Visitors Bureau

August 2008 Visitor Profile



Prepared for:

Collier County Board of County Commissioners

and

Naples, Marco Island, Everglades Convention and Visitors Bureau

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Naples, Marco Island, Everglades: August 2008 Summary

Executive Summary

1. Despite August’s turbulent weather, Collier’s tourism industry contributed some \$56,311,939 in output (*Direct: \$37,767,900; Indirect/Induced: \$18,544,039*) to the County’s economy (+7.1%). Some 85,800 visitors stayed at the destination’s commercial lodging facilities (+2.1%). August 2008 saw a contraction in occupancy (-1.9 *points*) and a moderate increase in the industry’s Average Daily Rate (+2.0%).
2. The European market grew strongly this August, compensating for contractions in core domestic sectors. Specifically:

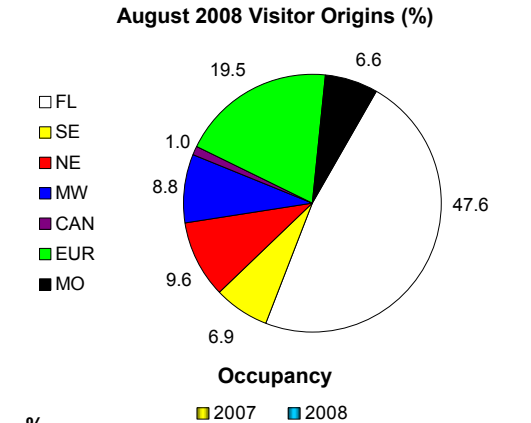
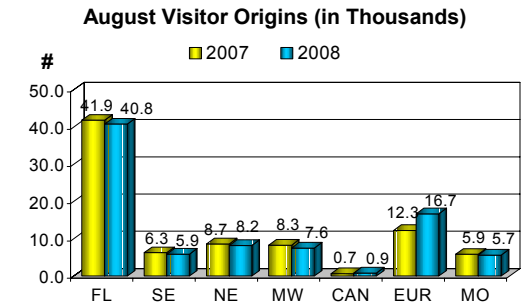
<u>Visitor Segments</u>	August		<u>% Δ</u>
	<u>2007</u> <u>Visitor #</u>	<u>2008</u> <u>Visitor #</u>	
Florida	41,916	40,841	- 2.6
Southeast	6,300	5,920	- 6.0
Northeast	8,652	8,237	- 4.8
Midwest	8,316	7,550	- 9.2
Canada	672	858	+27.7
Europe	12,264	16,731	+36.4
Markets of Opportunity	5,880	5,663	- 3.7
Total	84,000	85,800	+ 2.1

3. Reflecting the sheer size of the Florida market, fully 50.4% of our visitors drove a personal car (*2007: 52.9%*). Similarly, while Southwest Florida International remains the primary airport of deplanement, because of European travel, Miami International contributed fully 19.6% of the “lift” used by destination visitors (*2007: 7.4%*).
4. First time visitation is the “life-blood” that renews a destination’s market. This August, a significantly larger proportion (40.1%) were brand new market for the Naples, Marco Island, Everglades area (+7.6 *points*).
5. A strong visitor majority (96.6%) are satisfied with their stay, with 87.1% indicating they would choose the area again.
6. Better than two of every five visitors (*44.9%*) remember seeing or hearing a promotional message for the destination with half of these saying this information influenced them in choosing to visit the Naples, Marco Island, Everglades area.
7. Some 87.1% of Collier visitors report using the Internet to seek out travel information.

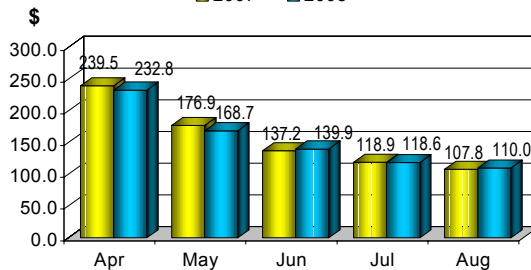
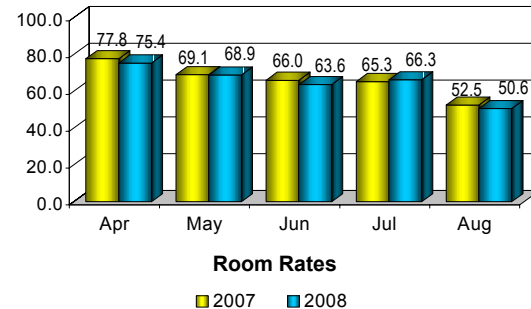
August 2008 Visitor Profile – Naples, Marco Island, Everglades

Visitor Volume	Annual 2007	Year to Date		% Δ	August		% Δ
		2007	2008	'07/'08	2007	2008	'07/'08
Visitors (#)	1,393,820	1,009,280	1,039,960	+3.0	84,000	85,800	+2.1
Room Nights	2,114,710	1,533,815	1,543,920	+0.7	139,965	136,470	-2.5
Direct Exp. (\$)	\$791,161,855	\$599,519,265	\$649,659,870	+8.4	\$35,276,600	\$37,767,900	+7.1

Visitor Origin	YTD # of Visitors (Jan. – Aug.)		% Δ	August 2008 # of Visitors	
	2007	2008	'07/'08	Rel %	2008
Florida	370,725	356,550	-3.8	47.6%	40,841
Southeast	79,210	76,133	-3.9	6.9	5,920
Northeast	198,278	211,589	+6.7	9.6	8,237
Midwest	189,673	198,555	+4.7	8.8	7,550
Canada	24,228	26,762	+10.5	1.0	858
Europe, Markets of Opp.	92,663	113,616	+22.6	19.5	16,731
Total	1,009,280	1,039,960	+3.0	100.0	85,800

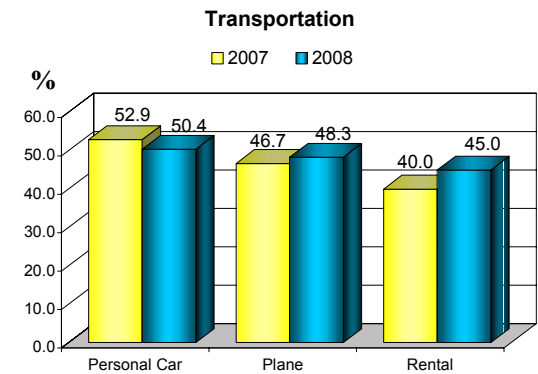


Occupancy	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
Occ. 2006	70.3%	86.5%	87.0%	79.4%	71.6%	68.9%	67.3%	50.4%	49.4%	56.4%	68.9%	64.8%
Occ. 2007	71.7	87.6	86.3	77.8	69.1	66.0	65.3	52.5	45.6	54.4	66.0	61.1
Occ. 2008	67.4	86.0	84.6	75.4	68.9	63.6	66.3	50.6				
Δ % ('07/'08)	-6.0%	-1.8%	-2.0%	-3.1%	-0.3%	-3.6%	+1.5%	-3.6%				
ADR 2006	\$170.0	\$222.4	\$248.5	\$224.3	\$157.0	\$132.9	\$114.9	\$102.5	\$99.6	\$112.1	\$121.6	\$164.2
ADR 2007	174.7	242.9	276.6	239.5	176.9	137.2	118.9	107.8	106.1	120.3	131.1	176.2
ADR 2008	190.2	266.0	290.1	232.8	168.7	139.9	118.6	110.0				
Δ % ('07/'08)	+8.9%	+9.5%	+4.9%	-2.8%	-4.6%	+2.0%	-0.3%	+2.0%				
RevPAR 2006	\$119.5	\$192.4	\$216.2	\$178.1	\$112.4	\$91.6	\$77.3	\$51.7	\$49.2	\$63.2	\$83.8	\$106.4
RevPAR 2007	125.3	212.8	238.7	186.3	122.3	90.6	77.6	56.6	48.4	65.4	86.5	107.7
RevPAR 2008	128.2	228.8	245.4	175.5	116.2	89.0	78.6	55.7				
Δ % ('07/'08)	+2.3%	+7.5%	+2.8%	-5.8%	-5.0%	-1.8%	+1.3%	-1.6%				

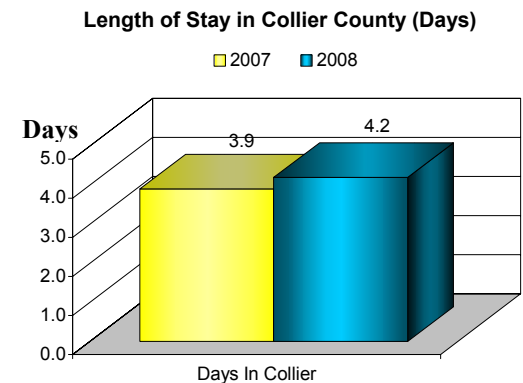
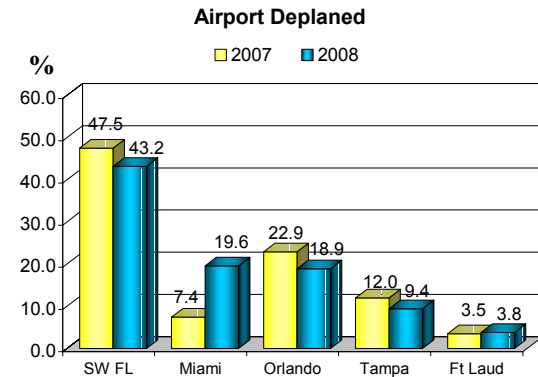


August 2008 Visitor Profile -- Naples, Marco Island, Everglades

	<u>August 2007</u>	<u>August 2008</u>
Transportation Mode (Multiple Response)		
Personal Car	52.9%	50.4%
Plane	46.7	48.3
Rental Car	40.0	45.0
Airport Deplaned (Base: Flew)		
Southwest Florida International	47.5%	43.2%
Miami International	7.4	19.6
Orlando International/Sanford	22.9	18.9
Tampa International	12.0	9.4
Fort Lauderdale International	3.5	3.8

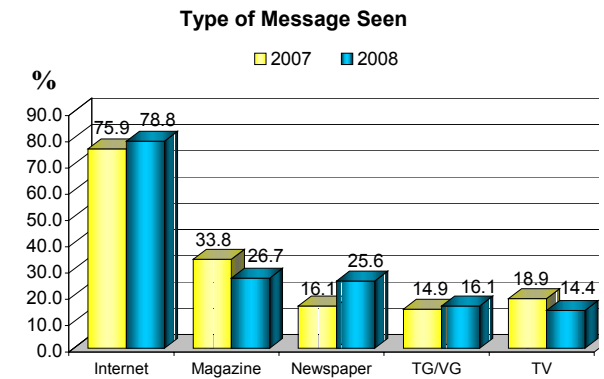
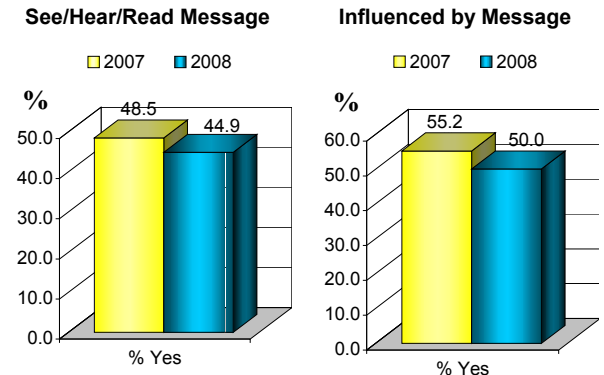
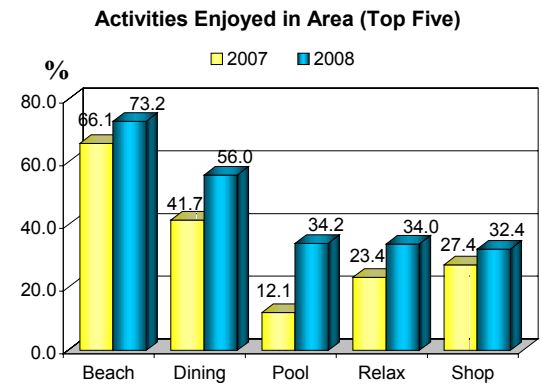


	<u>August 2007</u>	<u>August 2008</u>
Purpose of Trip (Multiple Response)		
Vacation	65.0%	63.2%
Business Travelers/Conferences/Business Meetings	34.0	38.1
Visit with Friends and Relatives	2.2	4.3
First Visit to Collier County (% Yes)	32.5%	40.1%
Assisted by Travel Agent (% Yes)	8.9%	10.6%
Length of Stay in Collier County (# of days)	3.9 days	4.2 days
Party Size (# of People)	2.3 people	2.6 people
Satisfaction with Collier County		
Very Satisfied	89.4%	77.6%
Satisfied	8.9	19.0
Satisfaction Level (Very Satisfied + Satisfied)	98.3%	96.6%
Recommend Collier to Friends/Relatives		
Yes	97.8%	92.9%



August 2008 Visitor Profile -- Naples, Marco Island, Everglades

	August 2007	August 2008
Activities Enjoyed in Area (Multiple Response)		
Beach	66.1%	73.2%
Dining Out	41.7	56.0
Pool	12.1	34.2
Relaxing	23.4	34.0
Shopping	27.4	32.4
Swimming	9.7	15.1
Sightseeing	4.4	14.0
Walking	2.2	13.1
Golfing	13.9	9.5
Reading	5.2	8.5
Everglades Adventures	9.1	8.3
Fishing	6.7	4.9
Expense Relative to Expectations		
More Expensive	16.9%	14.3%
Less Expensive	7.8	7.1
As Expected	72.5	75.0
Don't Know	2.8	3.6
Plan to Return (% Yes)		
To Local Area	91.1%	87.1%
Next Year (Base: Return to Local Area)	72.6	63.6
Median Age Head of Household (Years)	46.3	45.6
Median Annual Household Income	\$183,529	\$158,700
See/Read/Hear Collier Message (% Yes)	48.5%	44.9%
Type of Message Seen (Multiple Response)		
Internet	75.9%	78.8%
Magazine	33.8	26.7
Newspaper	16.1	25.6
Travel Guides/Visitor Guides/Brochures	14.9	16.1
Television	18.9	14.4
Influenced by Collier Message		
(Base: Respondents Reporting See/Read/Hear Message)	55.2%	50.0%



August 2008 Visitor Profile -- Naples, Marco Island, Everglades

Visitors specifically enjoy the following:

- ❖ Dinner Cruise
- ❖ Driving Range
- ❖ Everglades
- ❖ Exercising
- ❖ Family Picnic
- ❖ Jet Ski
- ❖ Kayak
- ❖ Music at Night
- ❖ Paddleball
- ❖ Paddleboats
- ❖ Parks
- ❖ Running on the Beach
- ❖ Seeing Dolphins
- ❖ Skim Boarding
- ❖ Spa
- ❖ Sunning on the Beach
- ❖ Theater
- ❖ Volleyball
- ❖ Zoo

Important traffic generators:

- ❖ Culture.
- ❖ Excellent meeting site with great accommodations.
A bit out of the way, but definitely worth it.
- ❖ Florida is our favorite – and we love Naples now.
- ❖ Golfing
- ❖ Have small plane and it's easy to fly into Naples.
- ❖ Heard about it – I was born in Naples, Italy.
- ❖ Kicked out of the Keys because of the weather.
Naples was recommended as alternative.
- ❖ Lets us see Disney World and relax too.
- ❖ Like beach, city, restaurants. Close to everything.
- ❖ Like it – want to live here!
- ❖ Looked like a nice beach from the travel guide.
- ❖ Love Naples – celebrating our anniversary.
- ❖ Nice to getaway in own backyard.
- ❖ Planned to go to North Carolina, but wanted to stay closer
to home because of storms.
- ❖ Relaxing, sophisticated, and nice beach.
- ❖ Wanted to visit someplace other than Miami.
- ❖ White sand.
- ❖ Zero bugs.