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Naples, Marco Island, Everglades Convention and Visitors Bureau

September 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: September 2008 Summary

Executive Summary

1. Collier's tourism industry contributed some \$34,932,192 in output (*Direct: \$23,428,700; Indirect/Induced: \$11,503,492*) to the economy. Although September 2008 saw a contraction in both occupancy (*-6.4 points*) and the industry's Average Daily Rate (*-1.4%*), some 57,700 visitors chose the destination's commercial lodging facilities for their stay.
2. Continuing the summer season's trend, the European market grew significantly this September. The geographic visitor origin markets are as follows:

<u>Visitor Segments</u>	September		<u>% Δ</u>
	<u>2007</u> <u>Visitor #</u>	<u>2008</u> <u>Visitor #</u>	
Florida	32,936	26,081	-20.8
Southeast	3,645	3,000	-17.7
Northeast	9,013	7,155	-20.6
Midwest	7,223	5,366	-25.7
Canada	663	519	-21.7
Europe	7,952	12,117	+52.4
Markets of Opportunity	4,838	3,462	-28.4
Total	66,270	57,700	-12.9

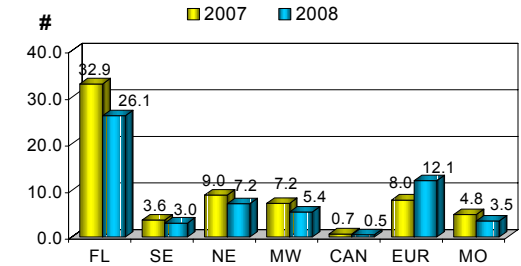
3. Fully 52.4% of Collier September 2008 visitors are air travelers (*2007: 48.6%*). Southwest Florida International remains the primary airport of deplanement. However, reflecting the impact of the European market, Miami International and Orlando International/Sanford both contributed an increasing share of visitor deplanements.
4. Some 40.4% are first time visitors to the destination. This represents a full 10.0 point increase over same month last year levels.
5. Visitors relate that the product and services delivered by the industry effectively meet their expectations. Fully 95.6% are satisfied with their stay, with 53.8% planning to return to the destination next year.
6. Half of Collier's visitors (*50.0%*) recall seeing or hearing a destination promotional message (*2007: 46.1%*). Some 55.4% of these were influenced in their choice of the Naples, Marco Island, Everglades area for this trip (*2007: 54.0%*).

September 2008 Visitor Profile – Naples, Marco Island, Everglades

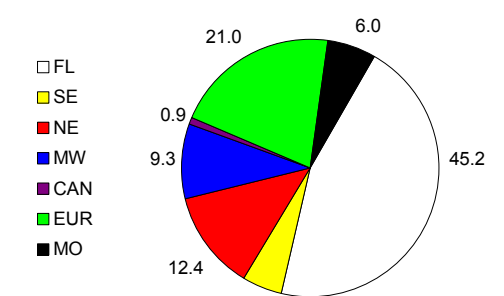
Visitor Volume	Annual 2007	Year to Date		% Δ	September		% Δ
	2007	2007	2008	'07/'08	2007	2008	'07/'08
Visitors (#)	1,393,820	1,075,550	1,097,660	+2.1	66,270	57,700	-12.9
Room Nights	2,114,710	1,651,555	1,646,220	-0.3	117,740	102,300	-13.1
Direct Exp. (\$)	\$791,161,855	\$624,504,515	\$673,088,570	+7.8	\$24,985,250	\$23,428,700	-6.2

Visitor Origin	YTD # of Visitors (Jan. – Sep.)		% Δ	September 2008 # of Visitors	
	2007	2008	'07/'08	Rel %	2008
Florida	403,661	382,631	-5.2	45.2%	26,081
Southeast	82,855	79,133	-4.5	5.2	3,000
Northeast	207,291	218,744	+5.5	12.4	7,155
Midwest	196,896	203,921	+3.6	9.3	5,366
Canada	24,891	27,281	+9.6	0.9	519
Europe	100,615	125,733	+25.0	21.0	12,117
Markets of Opp.	59,341	60,217	+1.5	6.0	3,462
Total	1,075,550	1,097,660	+2.1	100.0	57,700

September Visitor Origins (in Thousands)

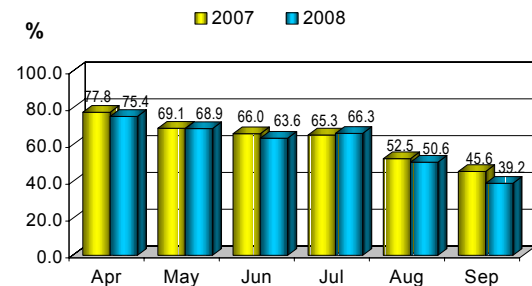


September 2008 Visitor Origins (%)

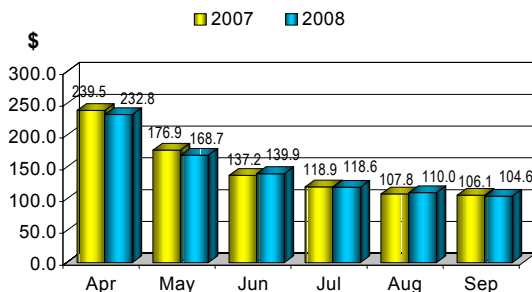


Occupancy	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
Occ. 2006	70.3%	86.5%	87.0%	79.4%	71.6%	68.9%	67.3%	50.4%	49.4%	56.4%	68.9%	64.8%
Occ. 2007	71.7	87.6	86.3	77.8	69.1	66.0	65.3	52.5	45.6	54.4	66.0	61.1
Occ. 2008	67.4	86.0	84.6	75.4	68.9	63.6	66.3	50.6	39.2			
Δ % ('07/'08)	-6.0%	-1.8%	-2.0%	-3.1%	-0.3%	-3.6%	+1.5%	-3.6%	-14.0%			
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	104.6			
Δ % ('07/'08)	+8.9%	+9.5%	+4.9%	-2.8%	-4.6%	+2.0%	-0.3%	+2.0%	-1.4%			
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	41.0			
Δ % ('07/'08)	+2.3%	+7.5%	+2.8%	-5.8%	-5.0%	-1.8%	+1.3%	-1.6%	-15.3%			

Occupancy

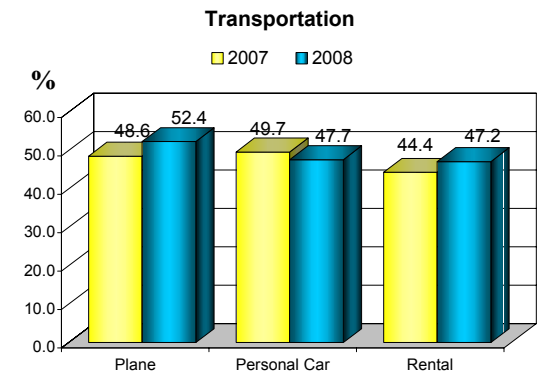


Room Rates

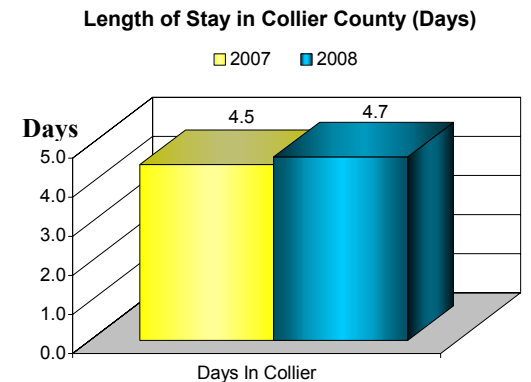
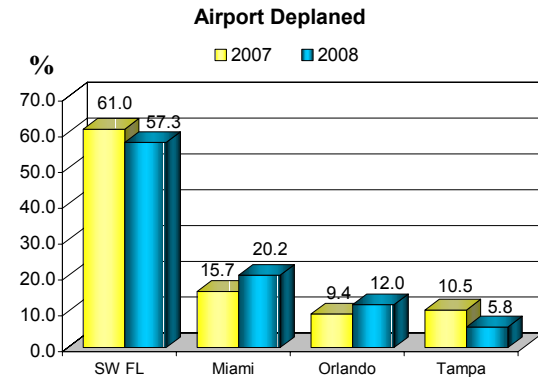


September 2008 Visitor Profile -- Naples, Marco Island, Everglades

	<u>September 2007</u>	<u>September 2008</u>
Transportation Mode (Multiple Response)		
Plane	48.6%	52.4%
Personal Car	49.7	47.7
Rental Car	44.4	47.2
Airport Deplaned (Base: Flew)		
Southwest Florida International	61.0%	57.3%
Miami International	15.7	20.2
Orlando International/Sanford	9.4	12.0
Tampa International	10.5	5.8

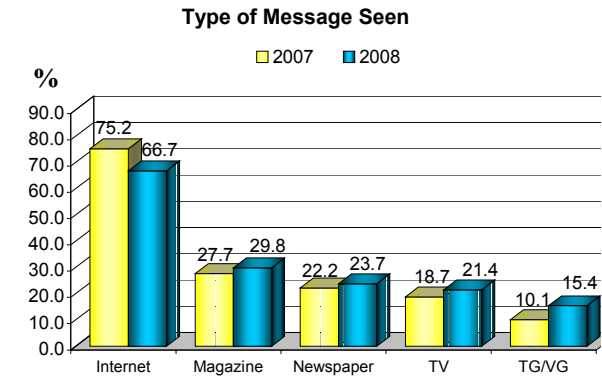
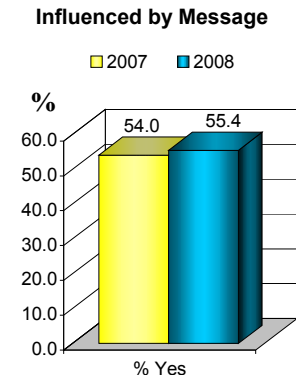
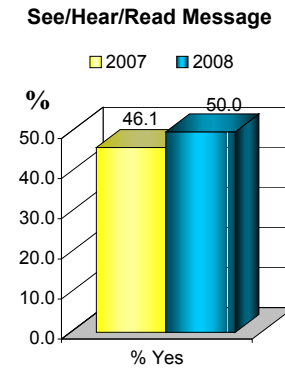
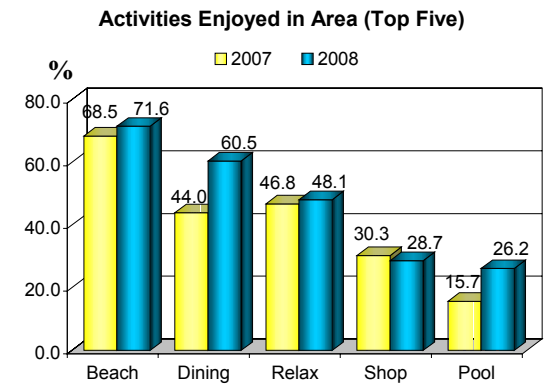


	<u>September 2007</u>	<u>September 2008</u>
Purpose of Trip (Multiple Response)		
Vacation/Weekend Getaway	72.6%	75.9%
Business Travelers/Conferences/Business Meetings	32.3	30.8
Wedding/Honeymoon	N/A	9.1
Visit with Friends and Relatives	8.0	7.3
Special Event	N/A	7.2
First Visit to Collier County (% Yes)	30.4%	40.4%
Assisted by Travel Professional (% Yes)	3.1%	11.5%
Length of Stay in Collier County (# of days)	4.5 days	4.7 days
Party Size (# of People)	2.2 people	2.4 people
Satisfaction with Collier County		
Very Satisfied	94.2%	86.5%
Satisfied	4.9	9.1
Satisfaction Level (Very Satisfied + Satisfied)	99.1%	95.6%
Recommend Collier to Friends/Relatives		
Yes	98.9%	94.2%



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

	<u>September 2007</u>	<u>September 2008</u>
Activities Enjoyed in Area (Multiple Response)		
Beach	68.5%	71.6%
Dining Out	44.0	60.5
Relaxing	46.8	48.1
Shopping	30.3	28.7
Pool	15.7	26.2
Swimming	14.5	21.9
Walking	12.1	18.2
Sightseeing	7.0	16.6
Visiting Friends/Relatives	N/A	15.8
Everglades Tour/Adventure	N/A	13.3
Golfing	15.2	11.9
Expense Relative to Expectations		
More Expensive	16.7%	14.4%
Less Expensive	4.7	2.9
As Expected	77.7	77.0
Don't Know	0.9	5.7
Plan to Return (% Yes)		
To Local Area	95.0%	86.5%
Next Year (Base: All Visitors)	73.2	53.8
Median Age Head of Household (Years)	47.2	48.8
Median Annual Household Income	\$151,130	\$138,747
See/Read/Hear Collier Message (% Yes)	46.1%	50.0%
Type of Message Seen (Multiple Response)		
Internet	75.2%	66.7%
Magazine	27.7	29.8
Newspaper	22.2	23.7
Television	18.7	21.4
Travel Guides/Visitor Guides/Brochures	10.1	15.4
Influenced by Collier Message (Base: Respondents Reporting See/Read/Hear Message)		
	54.0%	55.4%



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

Visitors describe the Naples, Marco Island, Everglades area as follows:

- ❖ A little slice of Heaven.
- ❖ Affluent, posh.
- ❖ Awesome: clean and peaceful.
- ❖ Beach resort, but also cosmopolitan area at same time.
- ❖ Beautiful places, water and nature.
- ❖ Casual, unpretentious, elegant.
- ❖ Central to the things we wanted to see and do.
- ❖ Clean and green and quiet.
- ❖ Convenient.
- ❖ Easy to get around.
- ❖ Fancy houses.
- ❖ Friendly, eager to please.
- ❖ Good clean water.
- ❖ Great golfing.
- ❖ I keep hearing good things about it.
- ❖ I would like to retire here.
- ❖ Laid back.
- ❖ Landscape & streetscape, unified but not codified.
- ❖ Lots of choices.
- ❖ Lovely.
- ❖ Meeting up with friends.
- ❖ Moneyed.
- ❖ Not crowded.
- ❖ Not young.
- ❖ Over crowded.
- ❖ Paradise.
- ❖ Peaceful, clean, unbelievable service.
- ❖ Pristine.
- ❖ Quaint.
- ❖ Quiet, more for retirement than for younger people.
- ❖ Quiet, pleasant.
- ❖ Relaxing, scenic, accessible.
- ❖ Safe and clean.
- ❖ Serene.
- ❖ Something different.
- ❖ The best!
- ❖ Tropical feeling.
- ❖ Upscale.
- ❖ Weather.

Visitors specifically enjoy the following:

- ❖ Architecture
- ❖ Cooking class
- ❖ Cultural Events
- ❖ Downtown
- ❖ Driving range
- ❖ Exploring parks
- ❖ Fakahatchee Park
- ❖ Gardens
- ❖ Hanging with friends.
- ❖ Jacuzzi
- ❖ Jogging
- ❖ Manatee Research Center
- ❖ Movies
- ❖ Religious holiday
- ❖ Running
- ❖ Skim boarding
- ❖ Snorkeling
- ❖ Touring around
- ❖ Water Park
- ❖ Water sports
- ❖ Weather
- ❖ Wine tasting
- ❖ Yoga
- ❖ Zoo