

RESEARCH DATA SERVICES, INC.

3825 HENDERSON BOULEVARD • SUITE 300
TAMPA, FLORIDA 33629
TEL (813) 254-2975 • FAX (813) 254-2986

November 24, 2008
Staff Report Presentations VIII - 1b
1 of 6

Naples, Marco Island, Everglades Convention and Visitors Bureau

October 2008 Visitor Profile



Prepared for:

Collier County Board of County Commissioners

and

Naples, Marco Island, Everglades Convention and Visitors Bureau

Prepared by:

Walter J. Klages, Ph.D.

President

Research Data Services, Inc.

Research@KlagesGroup.com

November 24, 2008

Naples, Marco Island, Everglades: October 2008 Summary

Executive Summary: October 2008

1. October 2008's number of overnight visitors to Collier County increased by 3.8% and Collier's tourism industry contributed fully \$70,675,487 in output (*Direct: \$47,401,400; Indirect/Induced: \$23,274,087*) to the economy (+8.6%). October 2008 also saw a 2.6% increase in occupancy (+1.4 *points*), although the industry recorded a 2.1% contraction of the Average Daily Rate.
2. Significantly, this October, Collier's share of the European market continued to grow at an accelerated pace. The Floridian and Southeastern markets also showed increases. The geographic visitor origin markets are as follows:

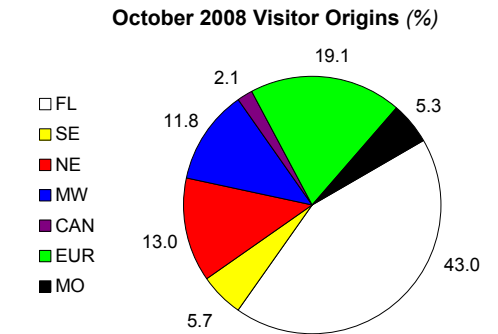
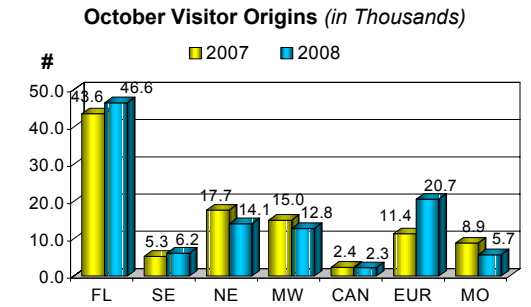
<u>Visitor Segments</u>	October		<u>% Δ</u>
	<u>2007</u> <u>Visitor #</u>	<u>2008</u> <u>Visitor #</u>	
Florida	43,597	46,569	+ 6.8
Southeast	5,319	6,173	+16.1
Northeast	17,731	14,079	-20.6
Midwest	15,019	12,780	-14.9
Canada	2,399	2,274	- 5.2
Europe	11,369	20,685	+81.9
Markets of Opportunity	8,866	5,740	-35.3
Total	104,300	108,300	+ 3.8

3. Better than half (52.9%) of Collier visitors this month traveled by air. Southwest Florida International (RSW) has the majority share of visitor deplanements. However, due to the strength of the European market, the contribution of Miami International expanded significantly this October (2007: 18.6%; 2008: 25.6%).
4. Fully 95.2% are satisfied with their stay in the Naples, Marco Island, Everglades area, and 56.5% of all visitors report plans to return to the destination next year (2007: 55.0%).
5. Some 46.9% of Collier's visitors recall seeing or hearing a promotional message for the destination (2007: 44.3%). Some 41.4% of these were influenced in their choice of the Naples, Marco Island, Everglades area for this trip (2007: 42.6%). Not surprisingly, a strong majority (84.4%) of Collier visitors get travel information on the Internet.
6. October visitors are significantly younger than the same month last year ranks (2007: 50.5 years of age; 2008: 58.4 years of age).

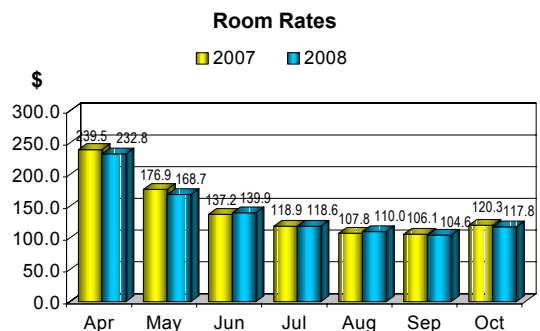
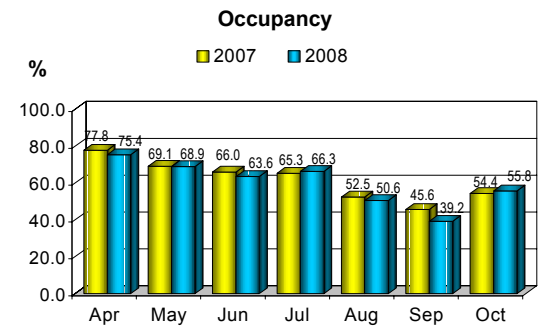
October 2008 Visitor Profile – Naples, Marco Island, Everglades

Visitor Volume	Annual 2007	Year to Date		% Δ	October		% Δ
		2007	2008	'07/'08	2007	2008	'07/'08
Visitors (#)	1,393,820	1,179,850	1,205,960	+2.2	104,300	108,300	+3.8
Room Nights	2,114,710	1,787,310	1,788,065	0.0	135,755	141,845	+4.5
Direct Exp. (\$)	\$791,161,855	\$668,157,915	\$720,489,970	+7.8	\$43,653,400	\$47,401,400	+8.6

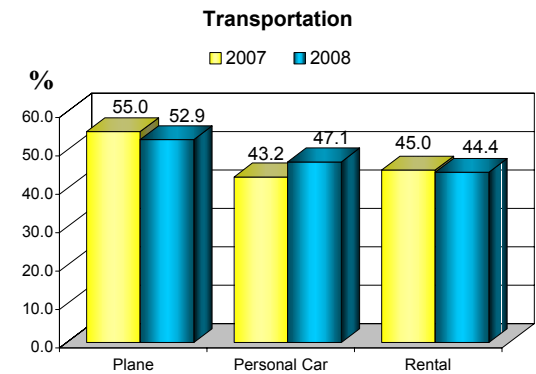
Visitor Origin	YTD # of Visitors (Jan. – Oct.)		% Δ	October 2008 # of Visitors	
	2007	2008	'07/'08	Rel %	2008
Florida	447,258	429,200	-4.0	43.0%	46,569
Southeast	88,174	85,306	-3.3	5.7	6,173
Northeast	225,022	232,823	+3.5	13.0	14,079
Midwest	211,915	216,701	+2.3	11.8	12,780
Canada	27,290	29,555	+8.3	2.1	2,274
Europe	111,984	146,418	+30.7	19.1	20,685
Markets of Opp.	68,207	65,957	-3.3	5.3	5,740
Total	1,179,850	1,205,960	+2.2	100.0	108,300



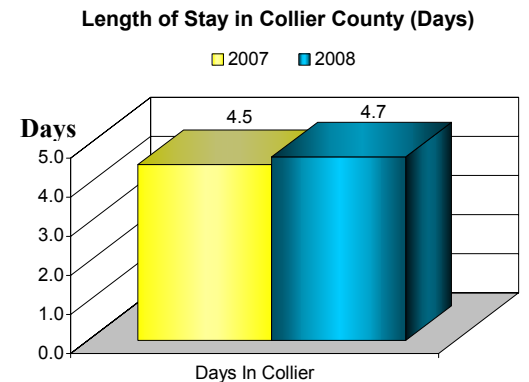
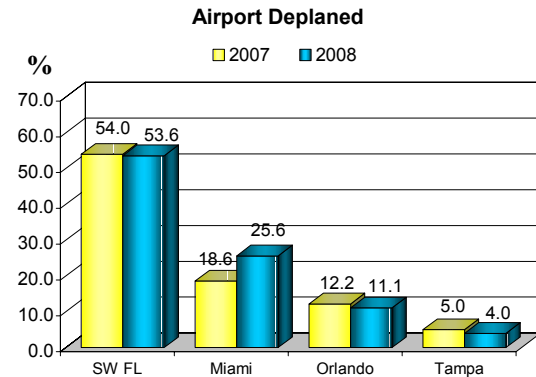
Occupancy	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
Occ. 2006	70.3%	86.5%	87.0%	79.4%	71.6%	68.9%	67.3%	50.4%	49.4%	56.4%	68.9%	64.8%
Occ. 2007	71.7	87.6	86.3	77.8	69.1	66.0	65.3	52.5	45.6	54.4	66.0	61.1
Occ. 2008	67.4	86.0	84.6	75.4	68.9	63.6	66.3	50.6	39.2	55.8		
Δ % ('07/'08)	-6.0%	-1.8%	-2.0%	-3.1%	-0.3%	-3.6%	+1.5%	-3.6%	-14.0%	+2.6%		
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	104.6	117.8		
Δ % ('07/'08)	+8.9%	+9.5%	+4.9%	-2.8%	-4.6%	+2.0%	-0.3%	+2.0%	-1.4%	-2.1		
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	65.7		
Δ % ('07/'08)	+2.3%	+7.5%	+2.8%	-5.8%	-5.0%	-1.8%	+1.3%	-1.6%	-15.3%	+0.5%		



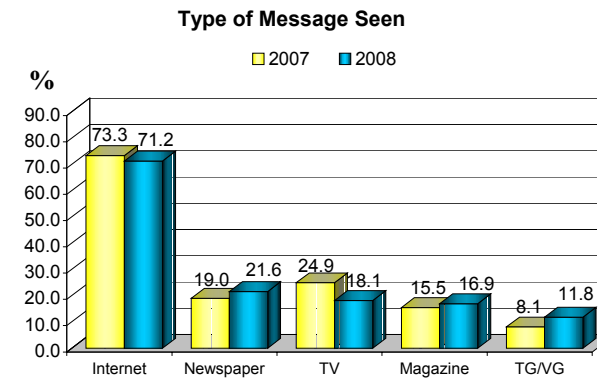
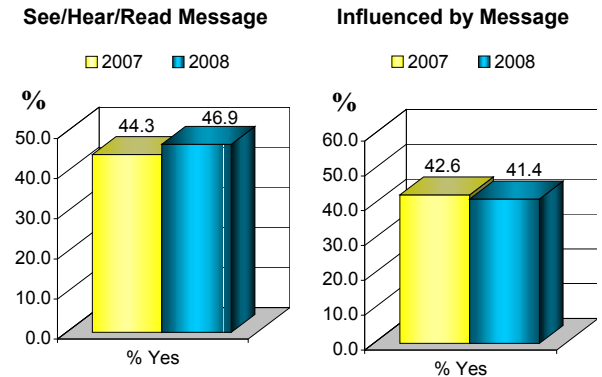
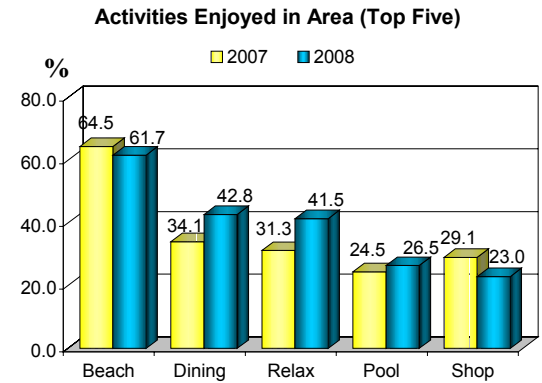
	<u>October 2007</u>	<u>October 2008</u>
Transportation Mode <i>(Multiple Response)</i>		
Plane	55.0%	52.9%
Personal Car	43.2	47.1
Rental Car	45.0	44.4
Airport Deplaned <i>(Base: Flew)</i>		
Southwest Florida International	54.0%	53.6%
Miami International	18.6	25.6
Orlando International/Sanford	12.2	11.1
Tampa International	5.0	4.0



	<u>October 2007</u>	<u>October 2008</u>
Purpose of Trip <i>(Multiple Response)</i>		
Vacation/Weekend Getaway	67.4%	69.4%
Business Travelers/Conferences/Business Meetings	34.0	30.4
Visit with Friends and Relatives	3.8	5.8
First Visit to Collier County (% Yes)	39.0%	37.1%
Assisted by Travel Professional (% Yes)	1.9%	10.6%
Length of Stay in Collier County (# of days)	4.5 days	4.7 days
Party Size (# of People)	2.2 people	2.3 people
Satisfaction with Collier County		
Very Satisfied	84.2%	90.4%
Satisfied	10.1	4.8
Satisfaction Level <i>(Very Satisfied + Satisfied)</i>	94.3%	95.2%
Recommend Collier to Friends/Relatives		
Yes	96.0%	94.6%



	October 2007	October 2008
Activities Enjoyed in Area (Multiple Response)		
Beach	64.5%	61.7%
Dining Out	34.1	42.8
Relaxing	31.3	41.5
Pool	24.5	26.5
Shopping	29.1	23.0
Sightseeing	N/A	14.5
Visiting Friends/Relatives	N/A	11.2
Golfing	14.2	11.0
Swimming	11.9	10.2
Everglades Tour/Adventure	N/A	9.9
Walking	N/A	9.0
Reading	N/A	7.9
Expense Relative to Expectations		
More Expensive	19.8%	9.9%
Less Expensive	10.5	11.4
As Expected	66.2	68.2
Don't Know	3.5	10.5
Plan to Return (% Yes)		
To Local Area	88.9%	90.4%
Next Year (Base: All Visitors)	61.9	62.5
Median Age Head of Household (Years)	50.5	48.5
Median Annual Household Income	\$195,625	\$146,400
See/Read/Hear Collier Message (% Yes)	44.3%	46.9%
Type of Message Seen (Multiple Response)		
Internet	73.3%	71.2%
Newspaper	19.0	21.6
Television	24.9	18.1
Magazine	15.5	16.9
Travel Guides/Visitor Guides/Brochures	8.1	11.8
Influenced by Collier Message		
(Base: Respondents Reporting See/Read/Hear Message)	42.6%	41.4%



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

- ❖ Accommodating.
- ❖ Affluent, posh.
- ❖ Beautiful area.
- ❖ Beautiful foliage, tropical feel.
- ❖ Beautiful, clean, quiet.
- ❖ Best in Florida.
- ❖ Better than other coast.
- ❖ Boca of the West Coast.
- ❖ Classy.
- ❖ Clean, upscale, safe.
- ❖ Close to Fort Lauderdale.
- ❖ Decent, polite people.
- ❖ Easy to get around.
- ❖ Elegant.
- ❖ Friendly, eager to please.
- ❖ Great beaches.
- ❖ Greenery, open space.
- ❖ International.
- ❖ Italian atmosphere is nice.
- ❖ Laid back, not glitzy, and no neon.
- ❖ Like the Gulf better, more “up” market.
- ❖ Lovely.
- ❖ Low key.
- ❖ Neat community.
- ❖ Nice beaches, good shopping, safe, friendly.
- ❖ Nice crosswalks, roadsides kept in good condition.
- ❖ Nice family place.
- ❖ Nice shops.
- ❖ No big condos on the beach.
- ❖ Not as busy and uppity as East Coast.
- ❖ Not crowded.
- ❖ Overall beauty - streets, buildings, nature.
- ❖ Paradise, not as commercial, quaint.
- ❖ Peaceful.
- ❖ People make you feel at home.
- ❖ Picturesque.
- ❖ Pretty.
- ❖ Pristine.
- ❖ Relaxation.
- ❖ Safe and clean.
- ❖ Scenic.
- ❖ Serene, you know you’re on vacation.
- ❖ Slow pace.
- ❖ Sophisticated, nice crowd, expensive.
- ❖ Stunning.
- ❖ Sunny skies.
- ❖ Traffic good.
- ❖ Tranquil.
- ❖ Tropical vibe.
- ❖ Up and coming.
- ❖ Warm water.
- ❖ Welcoming.
- ❖ Well-organized.

Visitors specifically enjoy the following:

- ❖ Everglades.
- ❖ Hotel.
- ❖ Movies.
- ❖ Naples.
- ❖ Nice people.
- ❖ Partying.
- ❖ Spa.
- ❖ Sunset.
- ❖ Traveling around.
- ❖ Watching football.
- ❖ Water park.
- ❖ Wonder Gardens.
- ❖ Zoo.