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Naples, Marco Island, Everglades Convention and Visitors Bureau

January 2009 Visitor Profile



Prepared for:

Collier County Board of County Commissioners
and
Naples, Marco Island, Everglades Convention and Visitors Bureau

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February 23, 2009

Naples, Marco Island, Everglades: January 2009 Summary

Executive Summary: January 2009

1. Notwithstanding a 6.2 point contraction in occupancy, Collier's tourism industry contributed some \$101,545,450 in economic impact to the County in January. To counter contracting visitation demand, the industry reduced its Average Daily Rate by 7.5% (2008: \$190.20; 2009: \$175.90).
2. While the destination's core domestic markets reflected the national economy's slowdown, Collier's European and Canadian market segments expanded. Close by Florida markets also contributed stabilizing market share. Overall, some 138,200 travelers chose the destination. The visitor origin distribution is as follows:

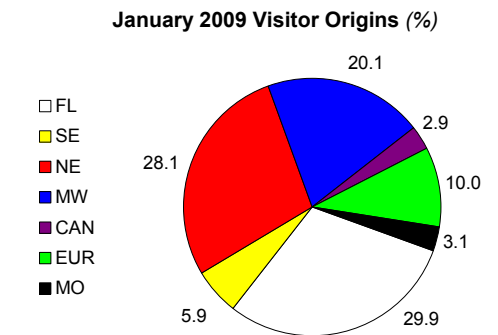
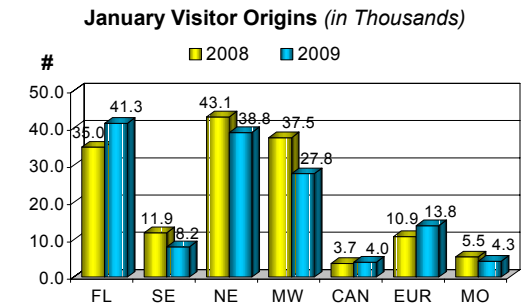
<u>Visitor Segments</u>	January		<u>% Δ</u>
	<u>2008</u> <u>Visitor #</u>	<u>2009</u> <u>Visitor #</u>	
Florida	34,957	41,322	+18.2
Southeast	11,947	8,154	-31.7
Northeast	43,070	38,834	- 9.8
Midwest	37,465	27,778	-25.9
Canada	3,688	4,008	+ 8.7
Europe	10,915	13,820	+26.6
Markets of Opportunity	5,458	4,284	-21.5
Total	147,500	138,200	- 6.3

3. Driven by the strengthening European market, fully 67.3% of visitors traveled to the destination by air. Southwest Florida International (RSW) remains the primary airport of deplanement in January, with the Orlando and Miami airports' share of the market expanding.
4. Most of Collier's January visitors (85.2%) are **very satisfied** with their stay at the destination, and 55.6% of all visitors plan to return to the destination next year (2008: 56.9%).
5. A larger proportion of this January's visitors recall seeing or hearing a tourism message promoting the destination (2008: 50.5%; 2009: 56.1%). Some 56.3% of these share that their choice of the Naples, Marco Island, Everglades area for this trip was influenced by that information (2008: 50.0%).
6. A majority of visitors research and seek information about the destination's assets and opportunities on the Internet.
7. This January's visitors are significantly younger (2008: 53.4 years of age; 2009: 49.4 years of age).

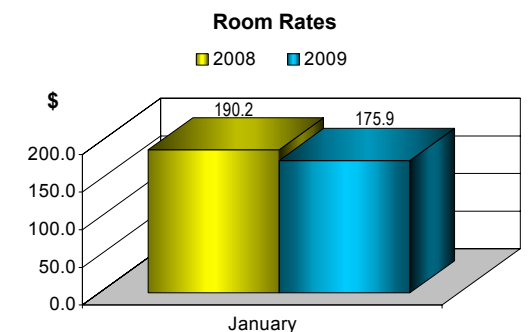
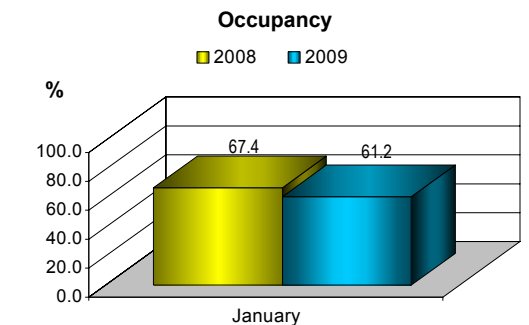
January 2009 Visitor Profile – Naples, Marco Island, Everglades

Visitor Volume	Annual 2008	Annual		% Δ	January		% Δ
	2008	2007	2008	'07/'08	2008	2009	'08/'09
Visitors (#)	1,413,760	1,393,820	1,413,760	+1.4	147,500	138,200	-6.3
Room Nights	2,110,580	2,114,710	2,110,580	-0.2	198,500	180,200	-9.2
Direct Exp. (\$)	\$836,390,570	\$791,161,855	\$836,390,570	+5.7	\$77,922,300	68,105,600	-12.6

Visitor Origin	Annual # of Visitors (Jan. – Dec.)			January 2009 # of Visitors	
	2007	2008	% Δ '07/'08	Rel %	2009
Florida	538,071	516,639	-4.0	29.9%	41,322
Southeast	102,176	100,027	-2.1	5.9	8,154
Northeast	249,452	249,706	+0.1	28.1	38,834
Midwest	246,908	248,073	+0.5	20.1	27,778
Canada	33,612	35,896	+6.8	2.9	4,008
Europe	141,400	187,790	+32.8	10.0	13,820
Markets of Opp.	82,201	75,629	-8.0	3.1	4,284
Total	1,393,820	1,413,760	+1.4	100.0	138,200

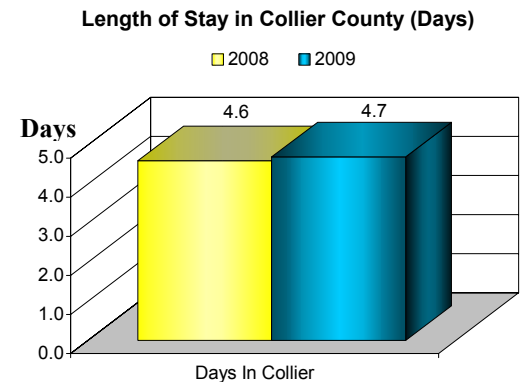
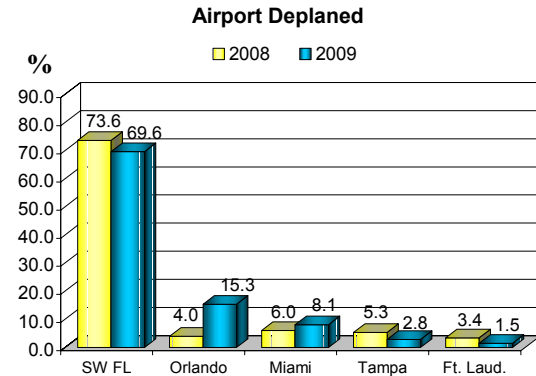
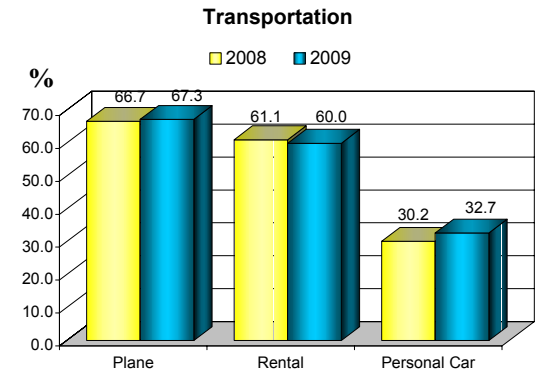


Occupancy	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
Occ. 2007	71.7%	87.6%	86.3%	77.8%	69.1%	66.0%	65.3%	52.5%	45.6%	54.4%	66.0%	61.1%
Occ. 2008	67.4	86.0	84.6	75.4	68.9	63.6	66.3	50.6	39.2	55.8	62.1	62.3
Occ. 2009	61.2											
Δ Pts. ('08/'09)	-6.2											
ADR 2007	\$174.7	\$242.9	\$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	125.7	160.6
ADR 2009	175.9											
Δ % ('08/'09)	-7.5%											
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	78.1	100.1
RevPAR 2009	107.7											
Δ % ('08/'09)	-16.0%											



January 2009 Visitor Profile -- Naples, Marco Island, Everglades

	<u>January 2008</u>	<u>January 2009</u>
Transportation Mode (Multiple Response)		
Plane	66.7%	67.3%
Rental Car	61.1	60.0
Personal Car	30.2	32.7
Airport Deplaned (Base: Flew)		
Southwest Florida International	73.6%	69.6%
Orlando International/Sanford	4.0	15.3
Miami International	6.0	8.1
Tampa International	5.3	2.8
Ft. Lauderdale International	3.4	1.5
Purpose of Trip (Multiple Response)		
Vacation	68.0%	72.6%
Business Travelers/Conferences/Business Meetings	32.0	21.9
Visit with Friends and Relatives	12.0	13.7
Special Events	2.9	6.2
First Visit to Collier County (% Yes)	32.2%	30.8%
First Time in Florida (% Yes)	4.7%	7.9%
Assisted by Travel Agent (% Yes)	7.2%	5.2%
Length of Stay in Collier County (# of days)	4.6 days	4.7 days
Party Size (# of People)	2.2 people	2.3 people
Satisfaction with Collier County		
Very Satisfied	80.6%	85.2%
Satisfied	15.1	10.3
Satisfaction Level (Very Satisfied + Satisfied)	95.7%	95.5%
Recommend Collier to Friends/Relatives		
Yes	91.1%	93.5%



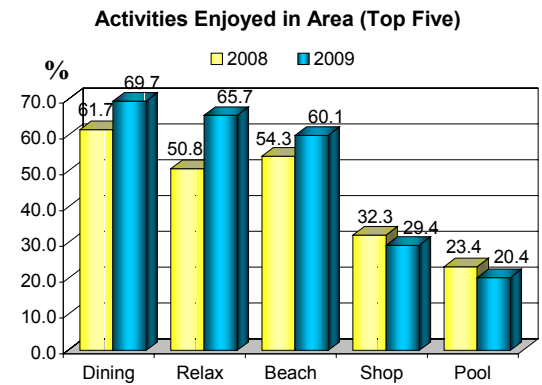
January 2009 Visitor Profile -- Naples, Marco Island, Everglades

January 2008

January 2009

Activities Enjoyed in Area (Multiple Response)

Dining Out	61.7%	69.7%
Relaxing	50.8	65.7
Beach	54.3	60.1
Shopping	32.3	29.4
Pool	23.4	20.4
Visit Friends/Relatives	16.8	17.0
Sightseeing	15.9	16.7
Reading	17.4	15.5
Walking	19.5	14.4
Everglades Adventures	15.4	12.3
Golfing	17.9	11.1
Swimming	16.4	10.4
Boating	12.9	8.7
Bars/Nightlife	10.6	8.1

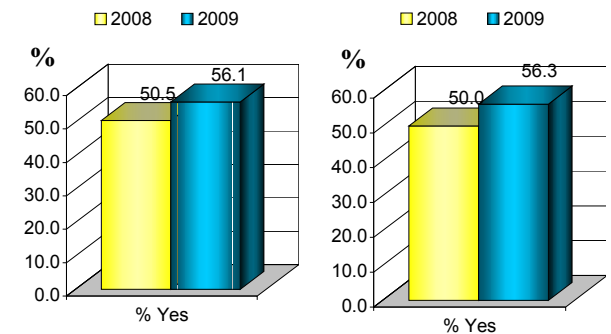


Expense Relative to Expectations

More Expensive	13.9%	6.0%
Less Expensive	1.0	1.5
As Expected	78.0	87.8
Don't Know	7.1	4.7

See/Hear/Read Message

Influenced by Message



Plan to Return (% Yes)

To Local Area	91.7%	90.8%
Next Year (Base: Return to Local Area)	62.0	61.2

Median Age Head of Household (Years)

2008	53.4
2009	49.4

Average Annual Household Income

2008	\$156,338
2009	\$143,011

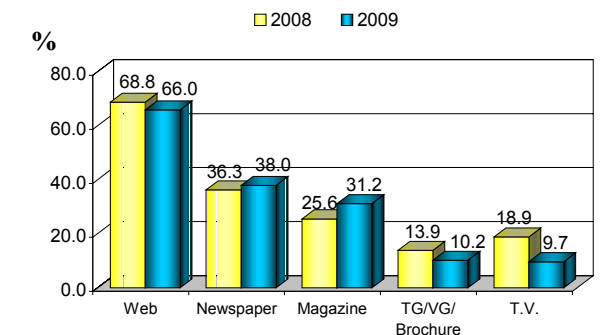
See/Read/Hear Collier Message (% Yes)

2008	50.5%
2009	56.1%

Type of Message Seen (Multiple Response)

Internet	68.8%	66.0%
Newspaper	36.3	38.0
Magazine	25.6	31.2
Travel Guides/Visitor Guides/Brochures	13.9	10.2
Television	18.9	9.7

Type of Message Seen (Top Five)



Influenced by Collier Message

(Base: Respondents Reporting See/Read/Hear Message)	50.0%	56.3%
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January 2009 Visitor Profile -- Naples, Marco Island, Everglades

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

- ❖ Accommodating.
- ❖ Attractive.
- ❖ Beautiful flowers.
- ❖ Brand new.
- ❖ Calm, scenic, natural setting.
- ❖ Chance to see different part of Florida.
- ❖ Charming, quaint.
- ❖ Child friendly.
- ❖ Clean beaches.
- ❖ Club atmosphere.
- ❖ Comfortable place, nice people.
- ❖ Direct flight, warm water, low key.
- ❖ Elegant.
- ❖ European style, lovely gardens, plants, nice people.
- ❖ Extraordinary service.
- ❖ Fabulous, heavenly, sheer perfection.
- ❖ Family friendly.
- ❖ Favorite place.
- ❖ First class.
- ❖ Friendlier, less busy than East Coast.
- ❖ Friendly and happy people.
- ❖ Fulfilling, salubrious.
- ❖ Fun, relaxing.
- ❖ Geriatric.
- ❖ Getting crowded/busy.
- ❖ Great airfares.
- ❖ Great beach, good restaurants.
- ❖ Great climate.
- ❖ Great place for a meeting.
- ❖ Great weather.
- ❖ High cost.
- ❖ Homey atmosphere, laid back.
- ❖ Kicked back.
- ❖ Leisurely.
- ❖ Less diverse than some East Coast destinations in a positive way.
- ❖ Location, good golf, beach, and shopping all right here.
- ❖ Lovely old Southern city.
- ❖ Luxurious.
- ❖ New, growing.
- ❖ Nice, mellow, easy, quiet.
- ❖ Not as big as Miami, but still things to do.
- ❖ Not mobbed.
- ❖ Not too big, clean streets, great beaches.
- ❖ Ocean nice.
- ❖ Options for activities.
- ❖ Paradise.
- ❖ Peaceful.
- ❖ Perfection.
- ❖ Positive feel.
- ❖ Pristine.
- ❖ Quiet.
- ❖ Relaxed.
- ❖ Reliable weather.
- ❖ Scenic.
- ❖ Slow, older community, relaxed.
- ❖ Strip malls.
- ❖ Terrific all around.
- ❖ The best beach.
- ❖ Unknown in Europe.
- ❖ Upscale, trendy, architecturally elite.
- ❖ Vacation friendly, serene, low key, quiet elegance, not pretentious, high levels of courtesy and kindness.
- ❖ Wealth.
- ❖ Well manicured.
- ❖ Well organized.

Visitors specifically enjoy the following:

- ❖ 3rd Street.
- ❖ 5th Avenue.
- ❖ Casino.
- ❖ Corkscrew Swamp.
- ❖ Dolphins
- ❖ Everglades.
- ❖ High tea.
- ❖ Kayaking.
- ❖ Parasailing.
- ❖ Philharmonic.
- ❖ Pier.
- ❖ Ping pong.
- ❖ Running.
- ❖ Spa treatments.
- ❖ Sunning.
- ❖ Trolley.
- ❖ Visit friends.
- ❖ Working out.
- ❖ Zoo.