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June 22, 2009  
Staff Report Presentations VI - 2b  
1 of 6

## Naples, Marco Island, Everglades Convention and Visitors Bureau

### May 2009 Visitor Profile



***Prepared for:***

Collier County Board of County Commissioners

and

Naples, Marco Island, Everglades Convention and Visitors Bureau

***Prepared by:***

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June 22, 2009

*Naples, Marco Island, Everglades: May 2009 Summary*

***Executive Summary: May 2009***

1. This May, the transition from the Winter to the Spring/Summer season was more difficult than in prior years. National economic conditions constrained both leisure and group travel across many of our core markets. In tandem with a 9.7% drop in visitation, the direct expenditures associated with tourist activity contracted by 17.7%. With occupancy dropping by 8.0 points, Collier's Average Daily Rate reflected an 11.4% rollback in response to the prevailing softness in demand.
2. The visitor origin distribution detailed below further documents these changes:

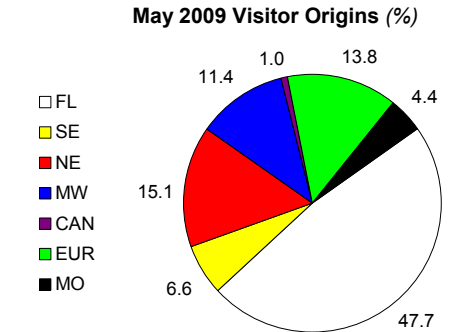
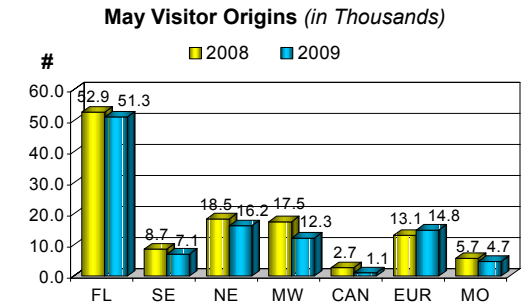
<u>Visitor Segments</u>	<b>May</b>		<u>% Δ</u>
	<b>2008</b>	<b>2009</b>	
	<u>Visitor #</u>	<u>Visitor #</u>	
Florida	52,880	51,277	-3.0
Southeast	8,694	7,095	-18.4
Northeast	18,461	16,233	-12.1
Midwest	17,508	12,255	-30.0
Canada	2,739	1,075	-60.8
Europe	13,101	14,835	+13.2
Markets of Opportunity	5,717	4,730	-17.3
<b>Total</b>	<b>119,100</b>	<b>107,500</b>	<b>-9.7</b>

3. Visitors who fly (47.9%), in the majority, use Southwest Florida International as their airport of choice. Notably, Miami International, Fort Lauderdale International, and Tampa International all contributed larger percentages of Collier's air travelers this May.
4. Importantly, the business/meetings segment experienced continuing deficits, recording a 23.6% drop when compared to the same month, prior year.
5. Collier visitors are slightly more satisfied when compared to last May's patrons (2008: 93.9%; 2009: 95.2%). This May, the good will and positive experiences of repeat visitors were important traffic generators for Collier tourism. The ranks of returning visitors grew by 6.8 points (2008: 45.9%; 2009: 52.7%)
6. Again reflecting the economic climate, a significantly smaller proportion of our patrons rate their experience in the destination as more expensive than expected (2008: 13.6%; 2009: 7.1%)
7. The typical visitor is slightly younger (2008: 47.7 years of age; 2009: 47.1 years of age) and commands a higher income (2008: \$127,826; 2009: \$128,505).

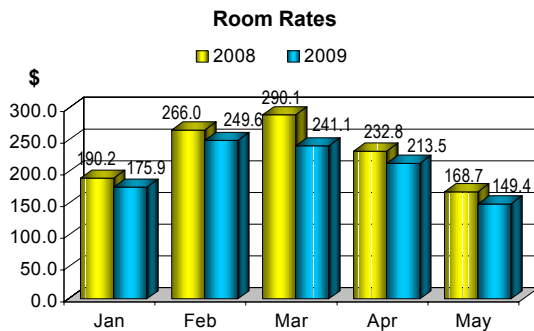
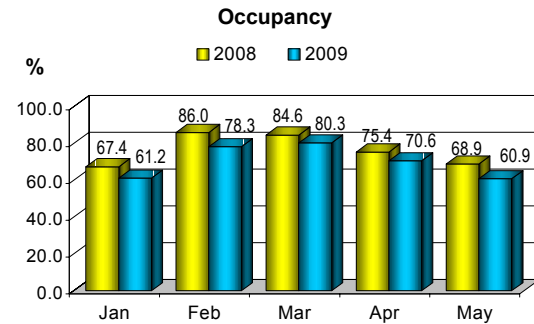
**May 2009 Visitor Profile – Naples, Marco Island, Everglades**

Visitor Volume	Annual 2008	Year to Date		% Δ '08/'09	May		% Δ '08/'09
		2008	2009		2008	2009	
Visitors (#)	1,413,760	735,260	683,700	-7.0	119,100	107,500	-9.7
Room Nights	2,110,580	1,062,650	980,630	-7.7	185,800	166,100	-10.6
Direct Exp. (\$)	\$836,390,570	\$500,492,470	\$437,220,000	-12.6	\$75,984,900	\$62,528,800	-17.7

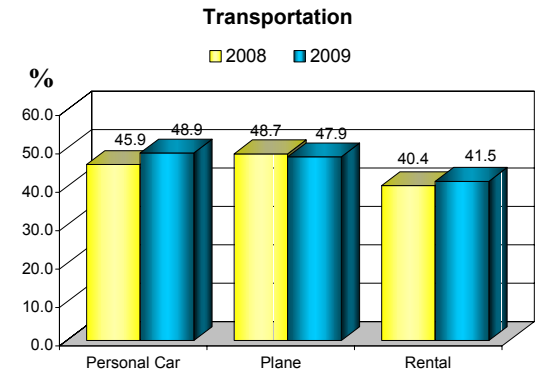
Visitor Origin	YTD # of Visitors (Jan. - May)		% Δ '08/'09	May 2009 # of Visitors	
	2008	2009		Rel %	2009
Florida	200,080	214,579	+7.2	47.7%	51,277
Southeast	54,201	45,948	-15.2	6.6	7,095
Northeast	181,336	168,446	-7.1	15.1	16,233
Midwest	168,506	129,728	-23.0	11.4	12,255
Canada	22,406	18,116	-19.1	1.0	1,075
Europe	71,518	75,499	+5.6	13.8	14,835
Markets of Opp.	37,213	31,384	-15.7	4.4	4,730
<b>Total</b>	<b>735,260</b>	<b>683,700</b>	<b>-7.0</b>	<b>100.0</b>	<b>107,500</b>



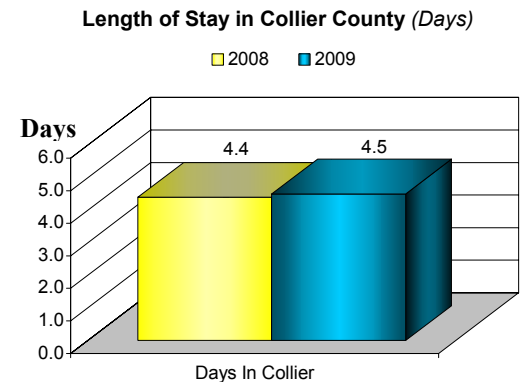
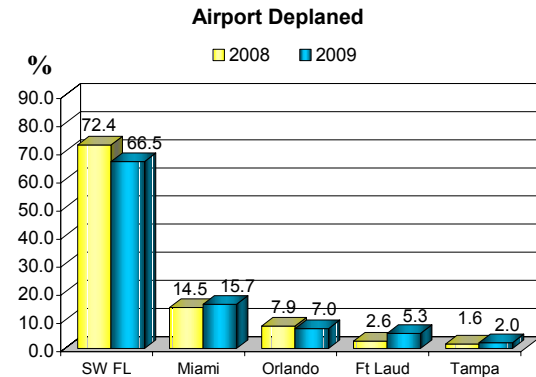
Occupancy	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
Occ. 2007	71.7%	87.6%	86.3%	77.8%	69.1%	66.0%	65.3%	52.5%	45.6%	54.4%	66.0%	61.1%
Occ. 2008	67.4	86.0	84.6	75.4	68.9	63.6	66.3	50.6	39.2	55.8	62.1	62.3
Occ. 2009	61.2	78.3	80.3	70.6	60.9							
<b>Δ Pts. ('08/'09)</b>	<b>-6.2</b>	<b>-7.7</b>	<b>-4.3</b>	<b>-4.8</b>	<b>-8.0</b>							
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	249.6	241.1	213.5	149.4							
<b>Δ % ('08/'09)</b>	<b>-7.5%</b>	<b>-6.2%</b>	<b>-16.9</b>	<b>-8.3%</b>	<b>-11.4%</b>							
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	195.4	193.6	150.7	91.0							
<b>Δ % ('08/'09)</b>	<b>-16.0%</b>	<b>-14.6%</b>	<b>-21.1</b>	<b>-14.1%</b>	<b>-21.7%</b>							



	<u>May 2008</u>	<u>May 2009</u>
<b>Transportation Mode</b> (Multiple Response)		
Personal Car	45.9%	48.9%
Plane	48.7	47.9
Rental Car	40.4	41.5
<b>Airport Deplaned</b> (Base: Flew)		
Southwest Florida International	72.4%	66.5%
Miami International	14.5	15.7
Orlando International/Sanford	7.9	7.0
Fort Lauderdale International	2.6	5.3
Tampa International	1.6	2.0

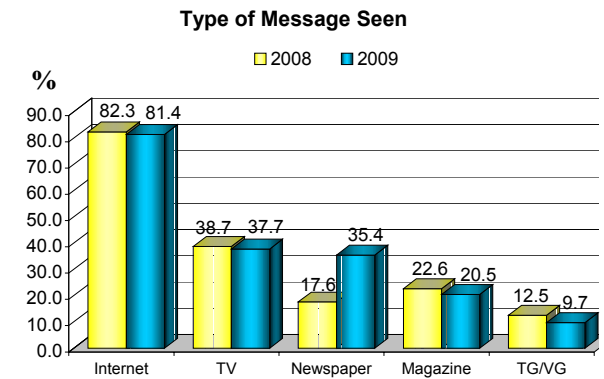
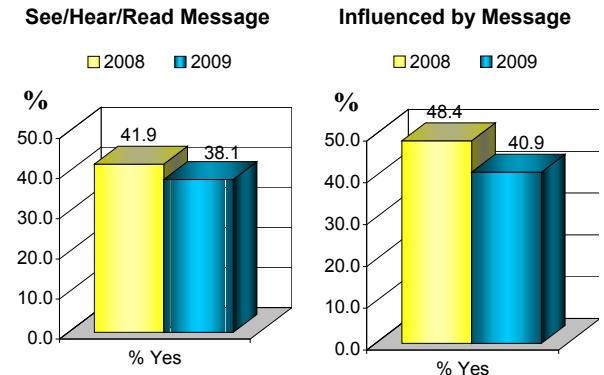
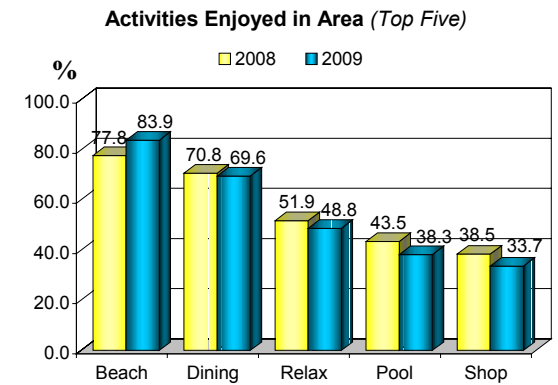


	<u>May 2008</u>	<u>May 2009</u>
<b>Purpose of Trip</b> (Multiple Response)		
Vacation	79.5%	80.9%
Business Travelers/Conferences/Business Meetings	20.2	17.1
Visit with Friends and Relatives	3.8	6.5
<b>First Visit to Collier County</b> (% Yes)	54.1%	47.3%
<b>First Visit to Florida</b> (% Yes)	2.6%	4.3%
<b>Assisted by Travel Professional</b> (% Yes)	9.6%	10.8%
<b>Length of Stay in Collier County</b> (# of days)	4.4 days	4.5 days
<b>Party Size</b> (# of People)	2.3 people	2.3 people
<b>Satisfaction with Collier County</b>		
Very Satisfied	82.7%	86.0%
Satisfied	11.2	9.2
<b>Recommend Collier to Friends/Relatives</b>		
Yes	96.8%	95.7%



**May 2009 Visitor Profile -- Naples, Marco Island, Everglades**

	<u>May 2008</u>	<u>May 2009</u>
<b>Activities Enjoyed in Area (Multiple Response)</b>		
Beach	77.8%	83.9%
Dining Out	70.8	69.6
Relaxing	51.9	48.8
Pool	43.5	38.3
Shopping	38.5	33.7
Sightseeing	26.5	22.9
Everglades Adventures	16.7	18.1
Reading	16.0	17.0
Walking	20.5	16.9
Shelling	19.2	16.0
Boating	15.4	15.1
Swimming	14.8	14.1
Bars & Nightlife	17.2	13.8
Sunning	N/A	10.7
Golfing	10.3	8.7
<b>Expense Relative to Expectations</b>		
More Expensive	13.6%	7.1%
Less Expensive	10.9	7.8
As Expected	73.4	81.1
Don't Know	2.1	4.0
<b>Plan to Return (% Yes)</b>		
To Local Area	95.5%	92.2%
Next Year (Base: Return to Local Area)	63.3	68.5
<b>Average Age Head of Household (Years)</b>		
	47.7	47.1
<b>Median Annual Household Income</b>		
	\$127,826	\$128,505
<b>See/Read/Hear Collier Message (% Yes)</b>		
	41.9%	38.1%
<b>Type of Message Seen (Multiple Response)</b>		
Internet	82.3%	81.4%
Television	38.7	37.7
Newspaper	17.6	35.4
Magazine	22.6	20.5
Travel Guides/Visitor Guides/Brochures	12.5	9.7
<b>Influenced by Collier Message</b>		
(Base: Respondents Reporting See/Read/Hear Message)	48.4%	40.9%



## May 2009 Visitor Profile -- Naples, Marco Island, Everglades

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

- ❖ Always sunshine.
- ❖ Attentive staff.
- ❖ Beautiful, peaceful, serene.
- ❖ Better than East Coast.
- ❖ Break from Miami.
- ❖ Breathtaking.
- ❖ Calm, relaxed.
- ❖ Charming, quaint, friendly.
- ❖ Comforting.
- ❖ Conservative.
- ❖ Courteous people.
- ❖ Crime is controlled.
- ❖ Diverse.
- ❖ Exciting.
- ❖ Extremely safe and clean.
- ❖ Family friendly.
- ❖ Fun.
- ❖ Getting too big.
- ❖ Good for the soul.
- ❖ Happy place.
- ❖ Hot and flat.
- ❖ Idyllic.
- ❖ Inviting.
- ❖ Laid back, peaceful.
- ❖ Love the city.
- ❖ Magnificent.
- ❖ Marvelous.
- ❖ Natural and picturesque.
- ❖ Nice getaway.
- ❖ Nice landscaping.
- ❖ Nice water.
- ❖ Not as well manicured.
- ❖ Not touristy.
- ❖ Paradise.
- ❖ Perfect.
- ❖ Pleasant, welcoming.
- ❖ Plenty to do.
- ❖ Pricey.
- ❖ Pristine.
- ❖ Quiet, not overcrowded.
- ❖ Regenerating.
- ❖ Relaxing, low-key.
- ❖ Resort-y.
- ❖ Rich.
- ❖ Ritzy.
- ❖ Soft sand.
- ❖ Something for everyone.
- ❖ Spacious.
- ❖ Tranquil.
- ❖ Tropical, sunny.
- ❖ Upscale, but charming.
- ❖ Wonderful.