

RESEARCH DATA SERVICES, INC.

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

Naples, Marco Island, Everglades Convention and Visitors Bureau

July 2009 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

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Executive Summary: July 2009

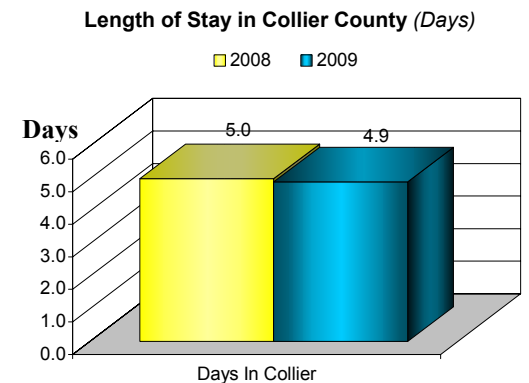
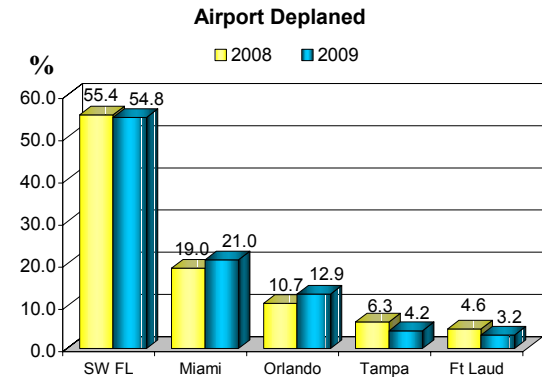
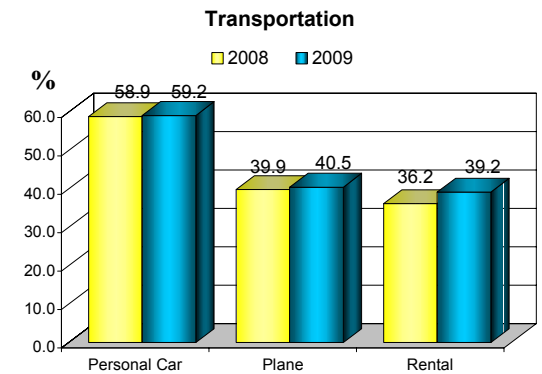
1. This July saw some 104,500 travelers staying in Collier County's commercial lodgings. Their combined economic impact created almost \$49 million in direct visitor expenditures. Although same month, last year comparisons continue to reflect a contracting national economy (**Visitors -3.4%; Expenditures: -5.4%**), July showed the least contraction in occupancy of any month this year (**2008: 66.3%; 2009: 63.6% -- -4.1%**).
2. Importantly, the European market showed growth (**+5.0%**) and the Florida market helped to stabilize visitation to the destination (**-0.6%**). The origin distribution of Collier's July visitors is as follows:

<u>July Visitor Segments</u>	2008	2009	<u>% Δ</u>
	<u>Visitor #</u>	<u>Visitor #</u>	
Florida	59,726	59,356	-0.6
Southeast	6,492	6,061	-6.6
Northeast	10,171	9,510	-6.5
Midwest	8,440	5,957	-29.4
Canada	1,948	1,672	-14.2
Europe	13,633	14,316	+5.0
Markets of Opportunity	7,790	7,628	-2.1
Total	108,200	104,500	-3.4

3. Although Southwest Florida International remains the primary airport of deplanement (**54.8%**), due to the strength of the European market, Miami International and Orlando International/Sanford both contributed a larger share of Naples, Marco Island, Everglades air travelers this year.
4. July again saw significant contractions in Collier's business/meetings market share -- a 27.8% drop in a same month, last year comparison.
5. Collier's July visitors are highly satisfied with their stay (**2009: 93.5% satisfaction rating**). The destination's positive image among repeat visitors is an important visitation generator. The ranks of returning guests grew by 4.9 points (**2008: 56.9%; 2009: 61.8%**). Additionally, 61.2% of visitors report plans to return to Collier next year (**2008: 59.4%**).
6. Better than three of every four Collier visitors (**78.1%**) use the Internet to get travel information for their trip (**2008: 77.9%**).
7. This July's typical visitor is younger (**2008: 48.4 years of age; 2009: 46.8 years of age**) and commands a household income of \$124,792.

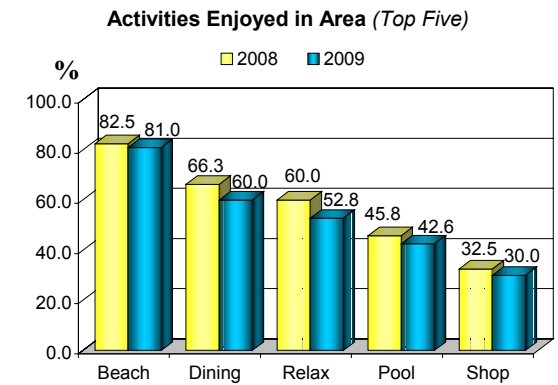
July 2009 Visitor Profile -- Naples, Marco Island, Everglades

	<u>July 2008</u>	<u>July 2009</u>
Transportation Mode (Multiple Response)		
Personal Car	58.9%	59.2%
Plane	39.9	40.5
Rental Car	36.2	39.2
Airport Deplaned (Base: Flew)		
Southwest Florida International	55.4%	54.8%
Miami International	19.0	21.0
Orlando International/Sanford	10.7	12.9
Tampa International	6.3	4.2
Fort Lauderdale International	4.6	3.2
Purpose of Trip (Multiple Response)		
Vacation	75.9%	85.4%
Business Travelers/Conferences/Business Meetings	17.8	13.3
Visit with Friends and Relatives	13.0	10.5
Special Event	8.3	7.1
First Visit to Collier County (% Yes)	43.1%	38.2%
First Visit to Florida (% Yes)	6.3%	7.2%
Assisted by Travel Professional (% Yes)	7.5%	8.0%
Length of Stay in Collier County (# of days)	5.0 days	4.9 days
Party Size (# of People)	3.5 people	3.4 people
Satisfaction with Collier County		
Very Satisfied	80.3%	83.5%
Satisfied	14.1	10.0
Satisfaction Level (Very Satisfied + Satisfied)	94.4%	93.5%
Recommend Collier to Friends/Relatives		
Yes	95.0%	90.8%

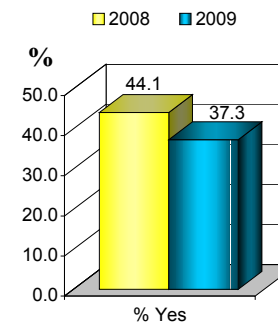


July 2009 Visitor Profile -- Naples, Marco Island, Everglades

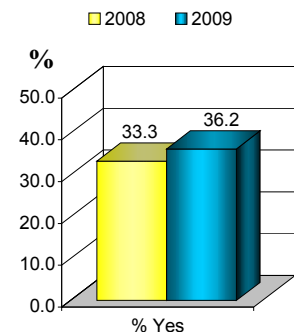
	July 2008	July 2009
Activities Enjoyed in Area (Multiple Response)		
Beach	82.5%	81.0%
Dining Out	66.3	60.0
Relaxing	60.0	52.8
Pool	45.8	42.6
Shopping	32.5	30.0
Reading	23.6	20.2
Swimming	23.1	20.0
Sightseeing	21.9	19.0
Everglades Adventures	11.3	15.0
Walking	18.0	13.4
Bars & Nightlife	8.3	13.3
Shelling	16.0	12.9
Golfing	10.0	8.9
Fishing	11.3	8.6
Visit Friends/Relatives	10.7	8.5
Sunsets	N/A	8.5
Boating	9.4	7.2
Expense Relative to Expectations		
More Expensive	12.4%	7.5%
Less Expensive	9.8	3.3
As Expected	75.3	86.3
Don't Know	2.5	2.9
Plan to Return (% Yes)		
To Local Area	90.0%	88.2%
Next Year (Base: Return to Local Area)	66.0	69.4
Median Age Head of Household (Years)		
	48.4	46.8
Average Annual Household Income		
	\$150,211	\$124,792
See/Read/Hear Collier Message (% Yes)		
	44.1%	37.3%
Type of Message Seen (Multiple Response)		
Internet	74.6%	75.7%
Television	18.3	32.0
Magazine	21.1	20.6
Newspaper	25.0	15.8
Travel Guides/Visitor Guides/Brochures	12.7	8.8
Influenced by Collier Message		
(Base: Respondents Reporting See/Read/Hear Message)	33.3%	36.2%



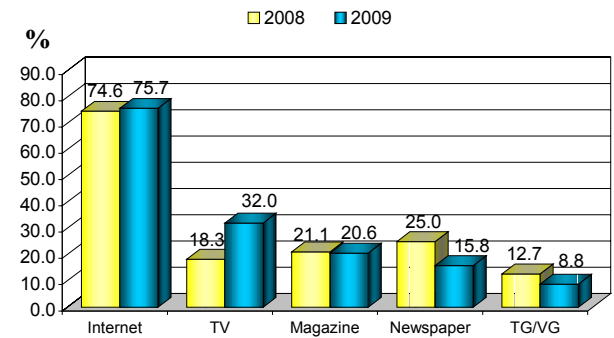
See/Hear/Read Message



Influenced by Message



Type of Message Seen



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

- ❖ Beautiful.
- ❖ Busy in season.
- ❖ Calming.
- ❖ Charming, love this hotel.
- ❖ Classy.
- ❖ Clean, inviting.
- ❖ Comfortable.
- ❖ Easy.
- ❖ Eco-tourism destination.
- ❖ Enchanting.
- ❖ Entertaining.
- ❖ Expensive.
- ❖ Fantastic, better than Hawaii.
- ❖ Good shops, walkable.
- ❖ Great nature, animals.
- ❖ Homey.
- ❖ Hospitable.
- ❖ Hot, but nice.
- ❖ Humid.
- ❖ Laid back.
- ❖ Leisurely.
- ❖ Lots of retirees/old people.
- ❖ Lovely, upscale, well-manicured.
- ❖ Mature population.
- ❖ Nice people.
- ❖ Not touristy, relaxing.
- ❖ Off the beaten path, secluded.
- ❖ Overwhelming.
- ❖ Paradise.
- ❖ Peaceful.
- ❖ Pleasant, friendly.
- ❖ Prettiest white sand.
- ❖ Pristine.
- ❖ Quiet, calm, understated.
- ❖ Quieter.
- ❖ Rain.
- ❖ Refreshing.
- ❖ Relaxed.
- ❖ Scenic.
- ❖ Slower pace, no traffic.
- ❖ Small, easy to find things.
- ❖ Sophisticated.
- ❖ Stress-free.
- ❖ Sunny.
- ❖ Tidy.
- ❖ Tranquil.
- ❖ Tropical
- ❖ Wealthy.
- ❖ Well kept/maintained.
- ❖ Wonderful, picturesque.