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

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

***Executive Summary: October 2009***

1. This October, some 102,300 travelers stayed in Collier’s commercial lodgings (-5.5%). Their combined direct expenditures reached some \$46 million, leaving a total economic impact of \$68,485,656.
2. The origin distributions of Collier’s October ‘09 visitors are as follows:

<u>Sept. Visitor Segments</u>	<u>2008 Visitor #</u>	<u>2009 Visitor #</u>	<u>% Δ</u>
Florida	46,569	40,920	-12.1
Southeast	6,173	5,217	-15.5
Northeast	14,079	15,550	+10.4
Midwest	12,780	12,685	-0.7
Canada	2,274	1,944	-14.5
Europe	20,685	20,358	-1.6
Markets of Opportunity	5,740	5,626	-2.0
<b>Total</b>	<b>108,300</b>	<b>102,300</b>	<b>-5.5</b>

3. This month, more visitors flew to reach the Naples, Marco Island, Everglades area (***2008: 52.9%; 2009: 58.9%***). Importantly, Southwest Florida International Airport accounted for the largest portion of Collier air travelers this October (***2008: 53.6%; 2009: 59.3%***).
4. The destination’s positive image is an important visitation regenerator. In October, the ranks of returning guests grew by 3.8 points (***2008: 62.9%; 2009: 66.7%***).
5. The majority of visitors are satisfied with their “Collier experience” (***2009: 95.7% satisfaction rating***), with fully 57.3% planning to return next year (***2008: 56.5%***).
6. This October’s typical visitor is slightly older (***2008: 48.5 years of age; 2009: 51.1 years of age***) and commands a median household income of \$136,964.

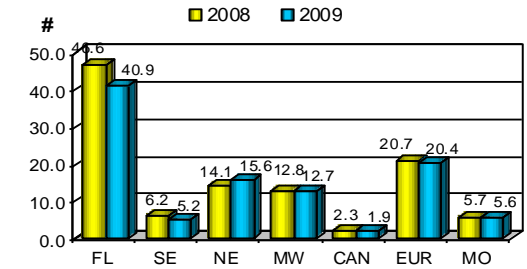
**October 2009 Visitor Profile – Naples, Marco Island, Everglades**

Visitor Volume	Annual 2008	Year to Date		% Δ '08/'09	October		% Δ '08/'09
	2008	2008	2009		2008	2009	
Visitors (#)	1,413,760	1,205,960	1,133,400	-6.0	108,300	102,300	-5.5
Room Nights	2,110,580	1,788,065	1,671,930	-6.5	141,845	134,900	-4.9
Direct Exp. (\$)	\$836,390,570	\$720,489,970	\$641,348,800	-11.0	\$47,401,400	\$45,932,700	-3.1

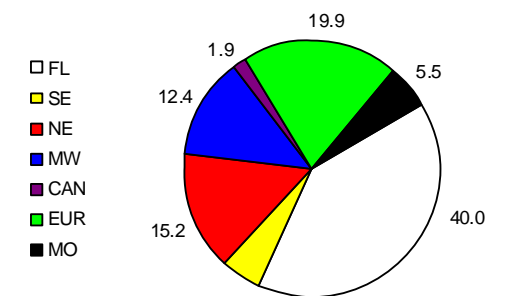
Visitor Origin	YTD # of Visitors (Jan. – Oct.)			October 2009 # of Visitors	
	2008	2009	% Δ '08/'09	Rel %	2009
Florida	429,200	437,250	+1.9	40.0%	40,920
Southeast	85,306	75,238	-11.8	5.1	5,217
Northeast	232,823	217,960	-6.4	15.2	15,550
Midwest	216,701	171,010	-21.1	12.4	12,685
Canada	29,555	24,632	-16.7	1.9	1,944
Europe	146,418	148,437	+1.4	19.9	20,358
Markets of Opp.	65,957	58,873	-10.7	5.5	5,626
<b>Total</b>	<b>1,205,960</b>	<b>1,133,400</b>	<b>-6.0</b>	<b>100.0</b>	<b>102,300</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	55.9	63.6	45.7	41.9	51.8		
<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>	<b>-7.7</b>	<b>-2.7</b>	<b>-4.9</b>	<b>+2.7</b>	<b>-4.0</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	128.7	105.6	98.6	99.4	111.6		
<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>	<b>-8.0%</b>	<b>-11.0%</b>	<b>-10.4%</b>	<b>-5.0%</b>	<b>-5.3%</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	71.9	67.2	45.1	41.6	57.8		
<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>	<b>-19.2%</b>	<b>-14.5%</b>	<b>-19.0%</b>	<b>+1.5%</b>	<b>-12.0%</b>		

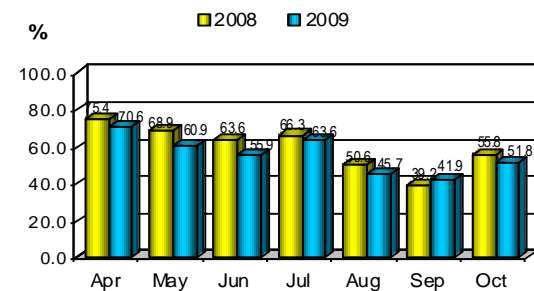
**October Visitor Origins (in Thousands)**



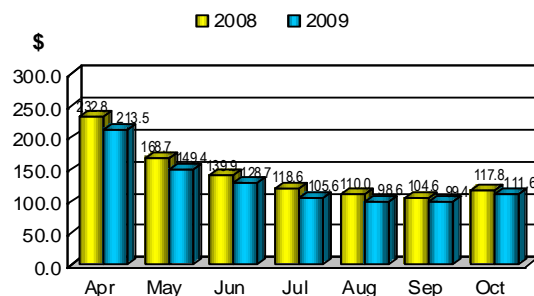
**October 2009 Visitor Origins (%)**



**Occupancy**

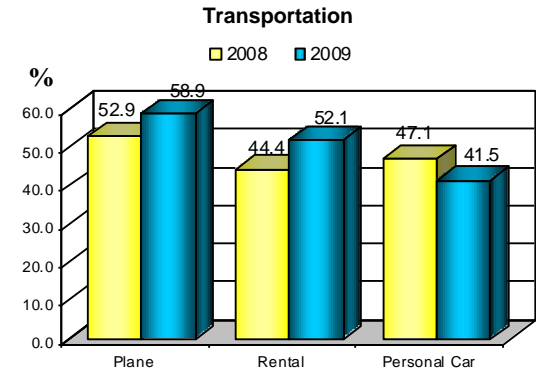


**Room Rates**

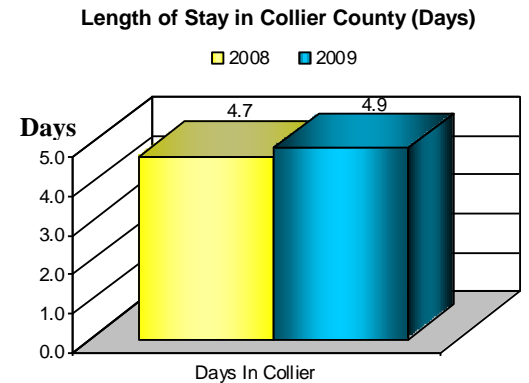
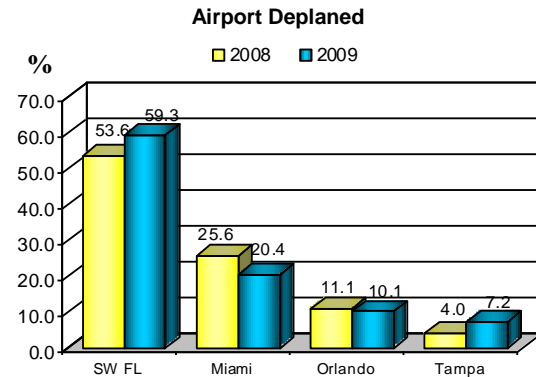


**October 2009 Visitor Profile -- Naples, Marco Island, Everglades**

	<u>October 2008</u>	<u>October 2009</u>
<b>Transportation Mode</b> (Multiple Response)		
Plane	52.9%	58.9%
Rental Car	44.4	52.1
Personal Car	47.1	41.5
<b>Airport Deplaned</b> (Base: Flew)		
Southwest Florida International	53.6%	59.3%
Miami International	25.6	20.4
Orlando International/Sanford	11.1	10.1
Tampa International	4.0	7.2

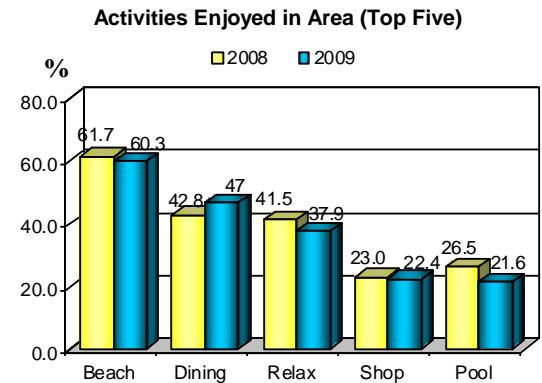


	<u>October 2008</u>	<u>October 2009</u>
<b>Purpose of Trip</b> (Multiple Response)		
Vacation/Weekend Getaway	69.4%	76.0%
Business Travelers/Conferences/Business Meetings	30.4	20.9
Visit with Friends and Relatives	5.8	8.3
<b>First Visit to Collier County</b> (% Yes)	37.1%	33.3%
<b>First Visit to Florida</b> (% Yes)	7.6%	4.2%
<b>Assisted by Travel Professional</b> (% Yes)	10.6%	10.0%
<b>Length of Stay in Collier County</b> (# of days)	4.7 days	4.9 days
<b>Party Size</b> (# of People)	2.3 people	2.4 people
<b>Satisfaction with Collier County</b>		
Very Satisfied	90.4%	88.4%
Satisfied	4.8	7.7
<b>Satisfaction Level</b> (Very Satisfied + Satisfied)	<b>95.2%</b>	<b>96.1%</b>
<b>Recommend Collier to Friends/Relatives</b>		
Yes	94.6%	95.7%

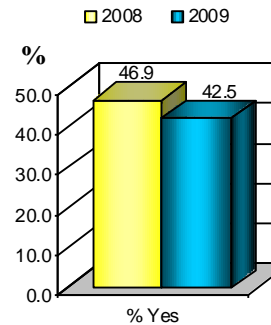


**October 2009 Visitor Profile -- Naples, Marco Island, Everglades**

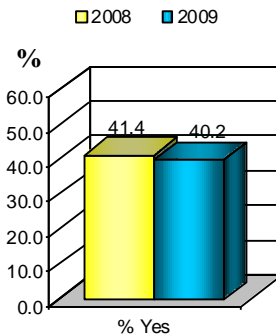
	<u>October 2008</u>	<u>October 2009</u>
<b>Activities Enjoyed in Area (Multiple Response)</b>		
Beach	61.7%	60.3%
Dining Out	42.8	47.0
Relaxing	41.5	37.9
Shopping	23.0	22.4
Pool	26.5	21.6
Sightseeing	14.5	16.4
Sunning	N/A	14.7
Visiting Friends/Relatives	11.2	14.4
Swimming	10.2	13.7
Sunsets	N/A	10.3
Everglades Tour/Adventure	9.9	8.7
Golfing	11.0	8.6
Reading	7.9	8.5
Walking	9.0	7.8
<b>Expense Relative to Expectations</b>		
More Expensive	9.9%	4.3%
Less Expensive	11.4	9.2
As Expected	68.2	76.2
Don't Know	10.5	10.3
<b>Plan to Return (% Yes)</b>		
To Local Area	90.4%	91.5%
Next Year (Base: All Visitors)	62.5	62.6
<b>Average Age Head of Household (Years)</b>	48.5	51.1
<b>Median Annual Household Income</b>	\$146,400	\$136,964
<b>See/Read/Hear Collier Message (% Yes)</b>	46.9%	42.5%
<b>Type of Message Seen (Multiple Response)</b>		
Internet	71.2%	68.9%
Newspaper	21.6	23.9
Television	18.1	23.8
Magazine	16.9	16.7
Travel Guides/Visitor Guides/Brochures	11.8	8.7
<b>Influenced by Collier Message</b> (Base: Respondents Reporting See/Read/Hear Message)		
	41.4%	40.2%



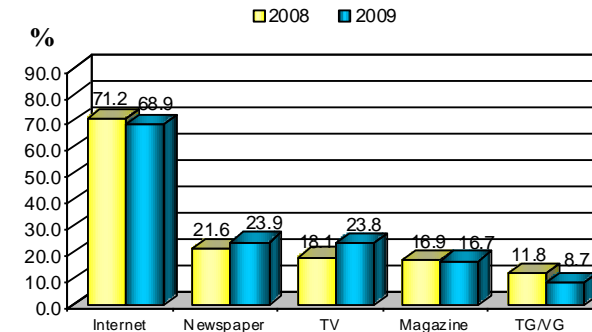
**See/Hear/Read Message**



**Influenced by Message**



**Type of Message Seen**



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

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

- ❖ A balmy, tropical, attitude adjustment.
- ❖ Beautiful and close.
- ❖ Charming.
- ❖ Clean, tidy, bright.
- ❖ Compact city, access for parking and walking.
- ❖ Congenial, friendly people.
- ❖ Easy going.
- ❖ Elegant.
- ❖ Ethnic mix of cuisine.
- ❖ Everything: beach, relaxation, atmosphere.
- ❖ Fabulous.
- ❖ Flat.
- ❖ Girls get away.
- ❖ Great restaurants.
- ❖ Hear friends say it is the most beautiful, relaxing area.
- ❖ Hotel, water, walking the beach, golfing, spa.
- ❖ Idyllic, peaceful, clean, pretty.
- ❖ Laid back old Florida meets modern Florida.
- ❖ Like the setting.
- ❖ Lots to do, well priced, beautiful.
- ❖ Lovely, traditional.
- ❖ Low key, private.
- ❖ Nice landscape.
- ❖ Outstanding weather, variety of eateries.
- ❖ Paradise, beautiful, entertaining.
- ❖ Peaceful.
- ❖ People swimming.
- ❖ Pleasant.
- ❖ Quiet.
- ❖ Refined, secure, high level of quality of life, well-kept, stylish.
- ❖ Relaxing, good shopping.
- ❖ Retro.
- ❖ Rich environment.
- ❖ Sand, quiet.
- ❖ Serene, relaxing.
- ❖ Sophisticated.
- ❖ Sorry, apart from the Everglades we thought it rather boring.
- ❖ Spa package.
- ❖ Stuck up.
- ❖ Teeming with wildlife.
- ❖ Tranquil, peaceful.
- ❖ Travel agent recommended.
- ❖ Up-market, but relaxed.
- ❖ Vacation time.
- ❖ Very clean, safe atmosphere to be in.
- ❖ Warm, convenient.
- ❖ Wedding.
- ❖ Welcoming, wealthy, nice people.