

# 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

### December 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***

January 25, 2010





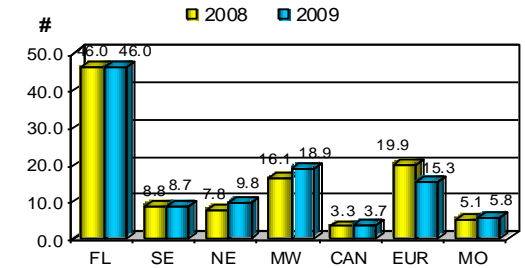


# December 2009 Visitor Profile – Naples, Marco Island, Everglades

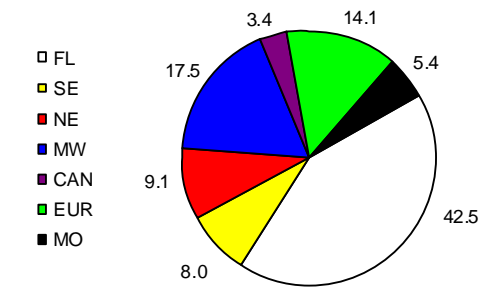
Visitor Volume	Annual 2008	Year to Date (Jan.-Dec.)		% Δ '08/'09	December		% Δ '08/'09
		2008	2009		2008	2009	
Visitors (#)	1,413,760	1,413,760	1,338,800	-5.3	107,000	108,200	+1.1
Room Nights	2,110,580	2,110,580	1,985,930	-5.9	164,160	161,000	-1.9
Direct Exp. (\$)	\$836,390,570	\$836,390,570	\$756,482,900	-9.6	\$66,740,100	\$68,884,500	+3.2

Visitor Origin	YTD # of Visitors (Jan.-Dec.)			Rel %	December # of Visitors			% Δ '08/'09
	2008	2009	'08/'09		2008	2009	'08/'09	
Florida	516,639	524,545	+1.5	43.0%	46,010	42.5%	45,985	-0.1
Southeast	100,027	88,851	-11.2	8.2	8,774	8.0	8,656	-1.3
Northeast	249,706	237,040	-5.1	7.3	7,811	9.1	9,846	+26.1
Midwest	248,073	205,594	-17.1	15.0	16,050	17.5	18,935	+18.0
Canada	35,896	31,810	-11.4	3.1	3,317	3.4	3,679	+10.9
Europe	187,790	182,064	-3.0	18.6	19,902	14.1	15,256	-23.3
Markets of Opp.	75,629	68,896	-8.9	4.8	5,136	5.4	5,843	+13.8
<b>Total</b>	<b>1,413,760</b>	<b>1,338,800</b>	<b>-5.3</b>	<b>100.0</b>	<b>107,000</b>	<b>100.0</b>	<b>108,200</b>	<b>+1.1</b>

December Visitor Origins (in Thousands)

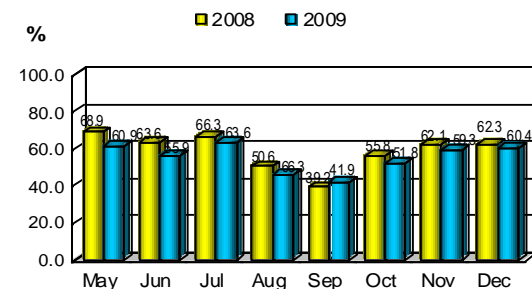


December 2009 Visitor Origins (%)

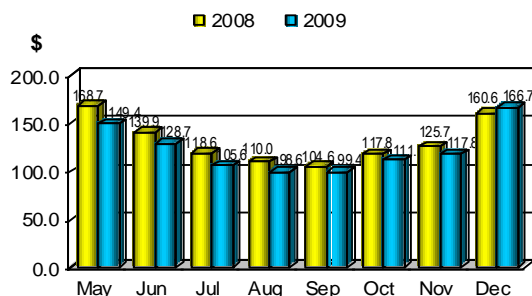


Occupancy	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
Occ. 2007	71.7%	87.6%	86.3%	77.8%	69.1%	66.0%	65.3%	52.5%	45.6%	54.4%	66.0%	61.1%
Occ. 2008	67.4	86.0	84.6	75.4	68.9	63.6	66.3	50.6	39.2	55.8	62.1	62.3
Occ. 2009	61.2	78.3	80.3	70.6	60.9	55.9	63.6	45.7	41.9	51.8	59.3	60.4
<b>Δ Pts. ('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>	<b>-2.8</b>	<b>-1.9</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	117.8	166.7
<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>	<b>-6.3%</b>	<b>+3.8%</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	69.9	100.7
<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>	<b>-10.5%</b>	<b>+0.6%</b>

Occupancy

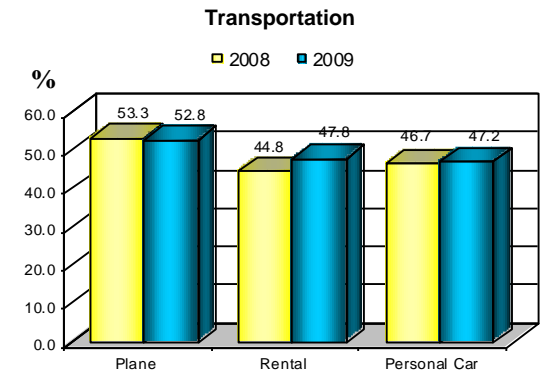


Room Rates

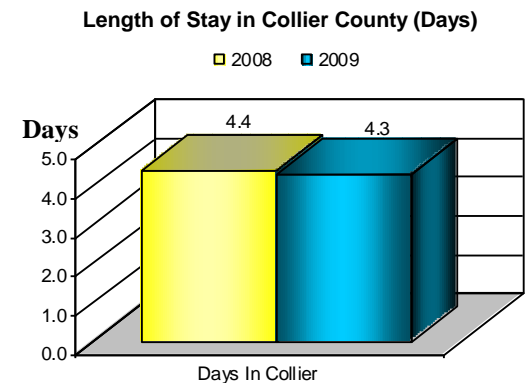
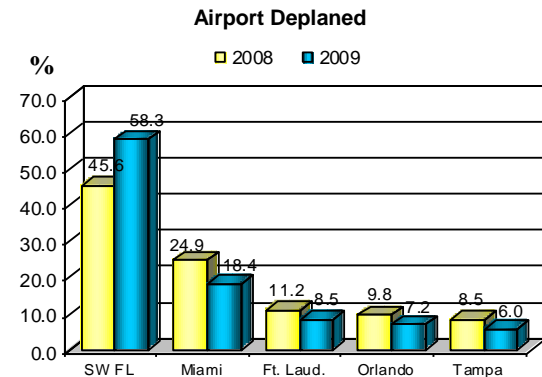


## December 2009 Visitor Profile -- Naples, Marco Island, Everglades

	<u>December 2008</u>	<u>December 2009</u>
<b>Transportation Mode</b> (Multiple Response)		
Plane	53.3%	52.8%
Rental Car	44.8	47.8
Personal Car	46.7	47.2
<b>Airport Deplaned</b> (Base: Flew)		
Southwest Florida International	45.6%	58.3%
Miami International	24.9	18.4
Fort Lauderdale International	11.2	8.5
Orlando International/Sanford	9.8	7.2
Tampa International	8.5	6.0

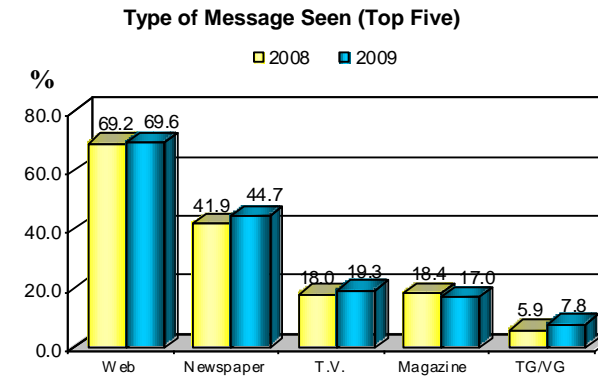
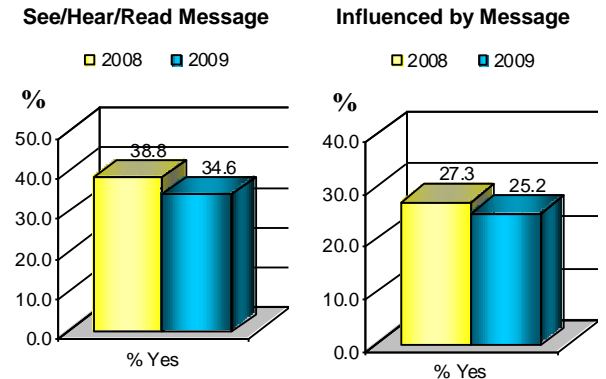
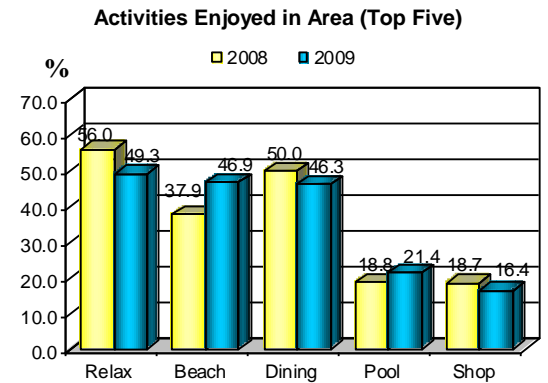


	<u>December 2008</u>	<u>December 2009</u>
<b>Purpose of Trip</b> (Multiple Response)		
Vacation	70.9%	73.7%
Business Travelers/Conferences/Business Meetings	30.7	19.6
Visit with Friends and Relatives	12.7	9.1
Special Events	9.3	5.7
<b>First Visit to Collier County</b> (% Yes)	36.6%	32.8%
<b>First Visit to Florida</b> (% Yes)	10.2%	6.7%
<b>Assisted by Travel Professional</b> (% Yes)	15.6%	10.1%
<b>Length of Stay in Collier County</b> (# of days)	4.4 days	4.3 days
<b>Party Size</b> (# of People)	2.2 people	2.3 people
<b>Satisfaction with Collier County</b>		
Very Satisfied	76.9%	73.9%
Satisfied	16.6	19.4
<b>Satisfaction Level</b> (Very Satisfied + Satisfied)	<b>93.5%</b>	<b>93.3%</b>
<b>Recommend Collier to Friends/Relatives</b>		
Yes	87.3%	91.3%



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

	<u>December 2008</u>	<u>December 2009</u>
<b>Activities Enjoyed in Area (Multiple Response)</b>		
Relaxing	56.0%	49.3%
Beach	37.9	46.9
Dining Out	50.0	46.3
Pool	18.8	21.4
Shopping	18.7	16.4
Visit Friends/Relatives	14.5	13.5
Walking	14.5	13.3
Reading	7.7	10.0
Bars/Nightlife	11.2	10.3
Swimming	13.7	10.2
Boating	9.6	8.6
Golfing	9.5	8.0
Everglades Adventures	7.0	6.6
<b>Expense Relative to Expectations</b>		
More Expensive	16.4%	8.0%
Less Expensive	1.4	3.5
As Expected	78.9	83.2
Don't Know	3.3	5.3
<b>Plan to Return (% Yes)</b>		
To Local Area	89.0%	88.5%
Next Year (Base: Return to Local Area)	51.0	57.8
<b>Average Age Head of Household (Years)</b>		
	46.5	49.2
<b>Median Annual Household Income</b>		
	\$139,519	\$147,670
<b>See/Read/Hear Collier Message (% Yes)</b>		
	38.8%	34.6%
<b>Type of Message Seen (Multiple Response)</b>		
Internet	69.2%	69.6%
Newspaper	41.9	44.7
Television	18.0	19.3
Magazine	18.4	17.0
Travel Guides/Visitor Guides/Brochures	5.9	7.8
<b>Influenced by Collier Message</b>		
(Base: Respondents Reporting See/Read/Hear Message)	27.3%	25.2%



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

- ❖ Attractive.
- ❖ Beautiful beach.
- ❖ Calm.
- ❖ Calming.
- ❖ Chilly.
- ❖ Clean, tidy.
- ❖ Comfortable.
- ❖ Culturally unique.
- ❖ Delicious.
- ❖ Easy to get around.
- ❖ Family friendly.
- ❖ Friendly.
- ❖ Fun.
- ❖ Glorious weather.
- ❖ Gorgeous.
- ❖ Green.
- ❖ High quality.
- ❖ Hot, sunny.
- ❖ Lots to do.
- ❖ Lovely.
- ❖ Nice.
- ❖ Organized.
- ❖ Posh.
- ❖ Prosperous.
- ❖ Relaxed.
- ❖ Relaxing environment.
- ❖ Safe.
- ❖ Serene.
- ❖ Shopping.
- ❖ Soothing.
- ❖ Tasteful.
- ❖ Very special.
- ❖ Warm.
- ❖ Wonderful temperature in the Gulf.