

# RESEARCH DATA SERVICES, INC.

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

### January 2010 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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**Executive Summary: January 2010**

1. This January, brought a significant surge in both occupancy **(+6.8 points)** and visitation **(+8.0%)**. As a result, the total impact of Collier tourism reached \$106,404,619, scoring a 4.8% increase over January 2009.
2. In the same vein, the destination’s core domestic feeder markets also showed growth. The origin distribution of Collier’s January 2010 visitors is as follows:

<u>Jan. Visitor Segments</u>	<u>2009 Visitor #</u>	<u>2010 Visitor #</u>	<u>% Δ</u>
Florida	41,322	43,297	+4.8
Southeast	8,154	9,854	+20.8
Northeast	38,834	44,790	+15.3
Midwest	27,778	29,263	+5.3
Canada	4,008	3,285	-18.0
Europe	13,820	12,690	-8.2
Markets of Opportunity	4,284	6,121	+42.9
<b>Total</b>	<b>138,200</b>	<b>149,300</b>	<b>+8.0</b>

3. Among the features most influential in drawing visitors to Collier, travelers cite:

<u>Influential Features</u>	<u>Percent</u>
Warm Weather	88.7%
Unspoiled Environment	88.4
Safety	81.7
Dining Opportunities	80.8
Relaxation	79.5
Upscale Lodgings	76.4
Value for the Money	68.4
Arts and Culture	48.1
Everglades Adventure	22.7

## *Naples, Marco Island, Everglades: January 2010 Summary*

4. When queried, visitors identify the destination as an accommodating, classy, and tranquil place, with tropical accents.
5. The majority of this January's visitors used air travel to reach the Naples, Marco Island, Everglades area (**2009: 67.3%; 2010: 65.7%**), while 34.4% used ground transportation. Southwest Florida International (RSW) was the primary airport of deplanement for air travelers (**2009: 69.6%; 2010: 72.7%**)
6. Importantly, the month of January saw an increase in the group/business travel segment (**2009: 21.9%; 2010: 25.9%**).
7. The ranks of travelers who rate the destination as "more expensive" than expected has decreased (**2009: 6.0%; 2010: 4.3%**).
8. Travelers' reliance on Internet information has reached 98.1%, with 77.6% using the web for the extant trip. Hotel, destination, and airline websites; Expedia; Orbitz; Trip Advisor; Priceline; and Travelocity are most prominently mentioned Internet information sources. Two of every three visitors (63.4%) report booking travel for their trip on the Internet.
9. When queried, fully 54.6% of January visitors relate that they saw a message promoting the Naples, Marco Island, Everglades area, with better than half of these saying that the message content influenced their choice of the destination for this trip.
10. The majority of visitors are satisfied with their experience (**2010: 97.5% satisfaction rating**), with 53.6% planning to return next year.
11. This January's typical visitor is slightly older (**2009: 49.4 years of age; 2010: 50.4 years of age**) and commands a substantially higher median household income (**2009: \$143,011; 2010: \$150,154**).

**Naples, Marco Island, Everglades:**  
*January 2010 Visitor Profile*



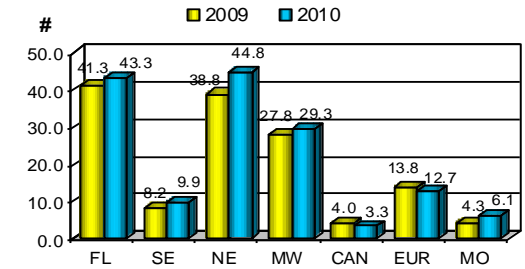
# January 2010 Visitor Profile – Naples, Marco Island, Everglades

Visitor Volume	Annual 2009	Annual		% Δ '08/'09	January		% Δ '09/'10
	2009	2008	2009		2009	2010	
Visitors (#)	1,338,800	1,413,760	1,338,800	-5.3	138,200	149,300	+8.0
Room Nights	1,985,930	2,110,580	1,985,930	-5.9	180,200	200,260	+11.1
Direct Exp. (\$)	\$756,482,900	\$836,390,570	\$756,482,900	-9.6	\$68,105,600	\$71,364,600	+4.8

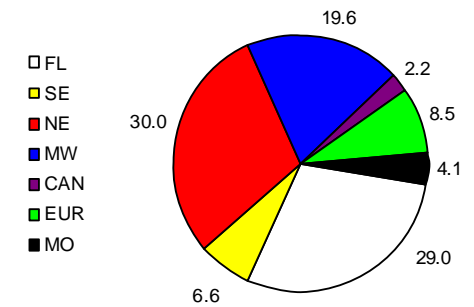
Visitor Origin	Annual # of Visitors			% Δ '08/'09	January # of Visitors			
	2008	2009	Rel %		2009	Rel %	2010	% Δ '09/'10
Florida	516,639	524,545	+1.5	29.9%	41,322	29.0%	43,297	+4.8
Southeast	100,027	88,851	-11.2	5.9	8,154	6.6	9,854	+20.8
Northeast	249,706	237,040	-5.1	28.1	38,834	30.0	44,790	+15.3
Midwest	248,073	205,594	-17.1	20.1	27,778	19.6	29,263	+5.3
Canada	35,896	31,810	-11.4	2.9	4,008	2.2	3,285	-18.0
Europe	187,790	182,064	-3.0	10.0	13,820	8.5	12,690	-8.2
Markets of Opp.	75,629	68,896	-8.9	3.1	4,284	4.1	6,121	+42.9
<b>Total</b>	<b>1,413,760</b>	<b>1,338,800</b>	<b>-5.3</b>	<b>100.0</b>	<b>138,200</b>	<b>100.0</b>	<b>149,300</b>	<b>+8.0</b>

Occupancy	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
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
Occ. 2010	68.0											
<b>Δ Pts. ('09/'10)</b>	<b>+6.8</b>											
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
ADR 2010	162.5											
<b>Δ % ('09/'10)</b>	<b>-7.6%</b>											
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
RevPAR 2010	110.5											
<b>Δ % ('09/'10)</b>	<b>+2.6%</b>											

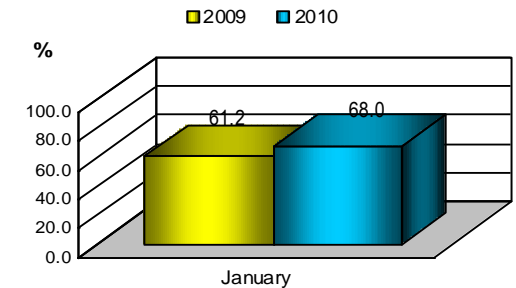
January Visitor Origins (in Thousands)



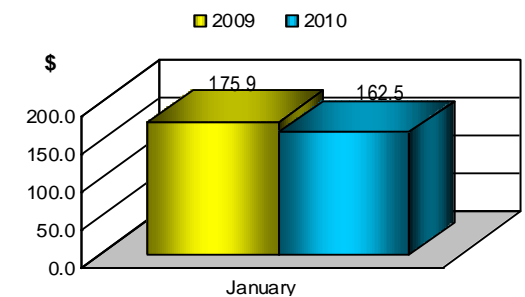
January 2010 Visitor Origins (%)



Occupancy

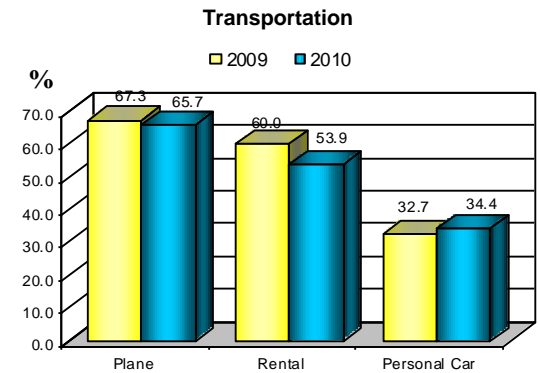


Room Rates

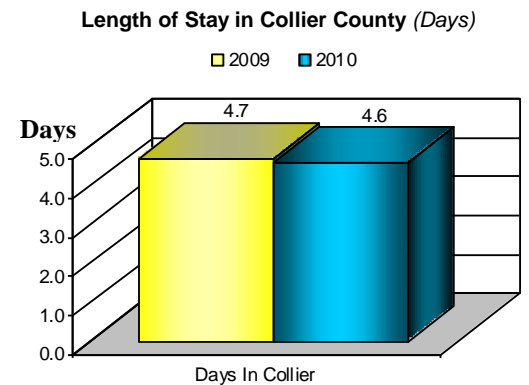
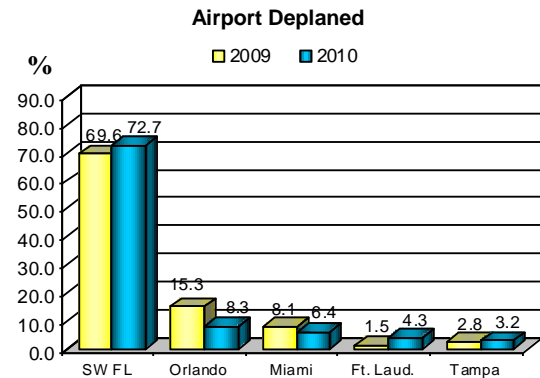


# January 2010 Visitor Profile -- Naples, Marco Island, Everglades

	<u>January 2009</u>	<u>January 2010</u>
<b>Transportation Mode</b> (Multiple Response)		
Plane	67.3%	65.7%
Rental Car	60.0	53.9
Personal Car	32.7	34.4
<b>Airport Deplaned</b> (Base: Flew)		
Southwest Florida International	69.6%	72.7%
Orlando International/Sanford	15.3	8.3
Miami International	8.1	6.4
Ft. Lauderdale International	1.5	4.3
Tampa International	2.8	3.2

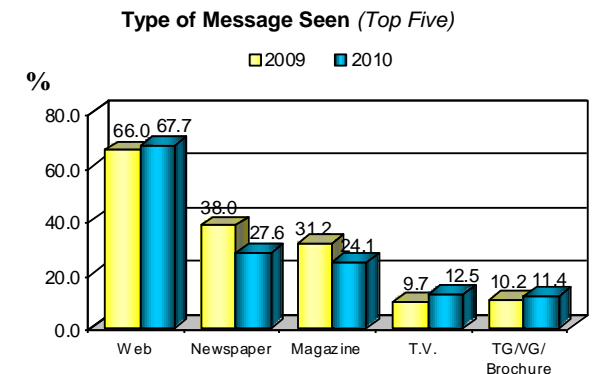
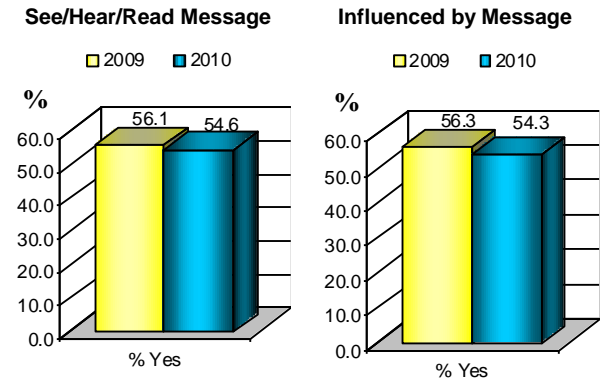
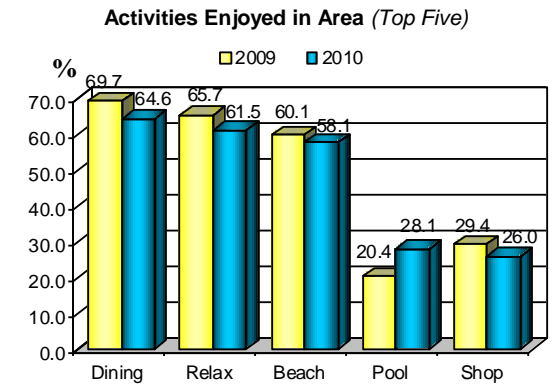


	<u>January 2009</u>	<u>January 2010</u>
<b>Purpose of Trip</b> (Multiple Response)		
Vacation	72.6%	75.3%
Business Travelers/Conferences/Business Meetings	21.9	25.9
Visit with Friends and Relatives	13.7	12.0
Special Events	6.2	7.1
<b>First Visit to Collier County</b> (% Yes)	30.8%	30.2%
<b>First Time in Florida</b> (% Yes)	7.9%	5.5%
<b>Assisted by Travel Professional</b> (% Yes)	5.2%	7.4%
<b>Length of Stay in Collier County</b> (# of days)	4.7 days	4.6 days
<b>Party Size</b> (# of People)	2.3 people	2.2 people
<b>Satisfaction with Collier County</b>		
Very Satisfied	85.2%	87.5%
Satisfied	10.3	10.0
<b>Satisfaction Level</b> (Very Satisfied + Satisfied)	<b>95.5%</b>	<b>97.5%</b>
<b>Recommend Collier to Friends/Relatives</b>		
Yes	93.5%	96.3%



# January 2010 Visitor Profile -- Naples, Marco Island, Everglades

	<u>January 2009</u>	<u>January 2010</u>
<b>Activities Enjoyed in Area (Multiple Response)</b>		
Dining Out	69.7%	64.6%
Relaxing	65.7	61.5
Beach	60.1	58.1
Pool	20.4	28.1
Shopping	29.4	26.0
Visit Friends/Relatives	17.0	16.3
Walking	14.4	16.0
Sightseeing	16.7	15.0
Reading	15.5	14.4
Everglades Adventures	12.3	12.8
Swimming	10.4	12.4
Bars/Nightlife	8.1	10.9
Golfing	11.1	9.6
<b>Expense Relative to Expectations</b>		
More Expensive	6.0%	4.3%
Less Expensive	1.5	0.6
As Expected	87.8	89.8
Don't Know	4.7	5.3
<b>Plan to Return (% Yes)</b>		
To Local Area	90.8%	92.3%
Next Year (Base: Return to Local Area)	61.2	58.1
<b>Average Age Head of Household (Years)</b>		
	49.4	50.4
<b>Median Annual Household Income</b>		
	\$143,011	\$150,154
<b>See/Read/Hear Collier Message (% Yes)</b>		
	56.1%	54.6%
<b>Type of Message Seen (Multiple Response)</b>		
Internet	66.0%	67.7%
Newspaper	38.0	27.6
Magazine	31.2	24.1
Television	9.7	12.5
Travel Guides/Visitor Guides/Brochures	10.2	11.4
<b>Influenced by Collier Message</b>		
(Base: Respondents Reporting See/Read/Hear Message)	56.3%	54.3%



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

- ❖ Accommodating.
- ❖ Attractive.
- ❖ Beautiful and fun.
- ❖ Beautiful, well-kept homes.
- ❖ Busy.
- ❖ Chic.
- ❖ Classy.
- ❖ Clean.
- ❖ Comfortable.
- ❖ Comforting.
- ❖ Convenient.
- ❖ Easy.
- ❖ Expensive.
- ❖ Family friendly.
- ❖ Fattening.
- ❖ Flora and fauna.
- ❖ Friendly.
- ❖ Good beach.
- ❖ Good fishing.
- ❖ Great place.
- ❖ Great walking.
- ❖ I loved seeing wild alligators.
- ❖ Laid back.
- ❖ Leisurely.
- ❖ Lively.
- ❖ Lots of traffic.
- ❖ Lovely places!
- ❖ Low key.
- ❖ More crowded than we thought.
- ❖ Nice landscaping.
- ❖ Nice resort.
- ❖ Offers a lot.
- ❖ Older population.
- ❖ One of the nicer Florida areas.
- ❖ Pleasant.
- ❖ Pretty.
- ❖ Quaint.
- ❖ Relaxing, safe.
- ❖ Ritzy.
- ❖ Secure.
- ❖ Serene.
- ❖ Sunny and calm.
- ❖ The people are friendly and hospitable.
- ❖ Total relaxation.
- ❖ Tranquil.
- ❖ Tropical.
- ❖ Upscale.
- ❖ Walkable.
- ❖ We just enjoy coming to the area.