

RESEARCH DATA SERVICES, INC.

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Naples, Marco Island, Everglades Convention and Visitors Bureau

November 2007 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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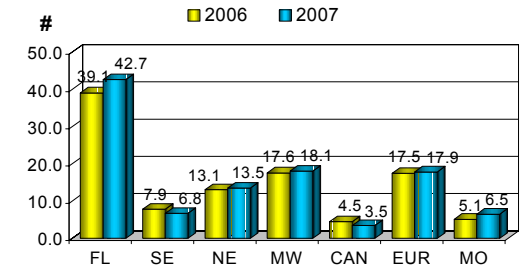
December 14, 2007

November 2007 Visitor Profile – Naples, Marco Island, Everglades

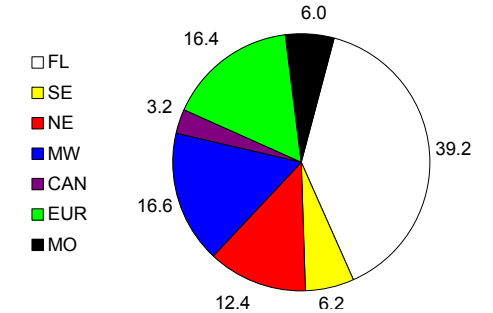
Visitor Volume	Annual 2006	YEAR TO DATE		% Δ	November		% Δ
		2006	2007	'06/'07	2006	2007	'06/'07
Visitors (#)	1,401,711	1,295,011	1,288,720	-0.5	104,800	108,870	+3.9
Room Nights	2,146,012	1,979,282	1,955,610	-1.2	165,360	168,300	+1.8
Direct Exp. (\$)	\$744,349,457	\$678,479,958	\$721,100,755	+6.3	\$48,074,341	\$52,942,840	+10.1

Visitor Origin	YTD # of Visitors (Jan. - Nov.)		% Δ	November 2007 # of Visitors	
	2006	2007	'06/'07	Rel %	2007
Florida	507,884	489,935	-3.5	39.2%	42,677
Southeast	102,797	94,924	-7.7	6.2	6,750
Northeast	229,009	238,522	+4.2	12.4	13,500
Midwest	227,656	229,987	+1.0	16.6	18,072
Canada	31,108	30,774	-1.1	3.2	3,484
Europe	129,924	129,839	-0.1	16.4	17,855
Markets of Opp.	66,633	74,739	+12.2	6.0	6,532
Total	1,295,011	1,288,720	-0.5	100.0	108,870

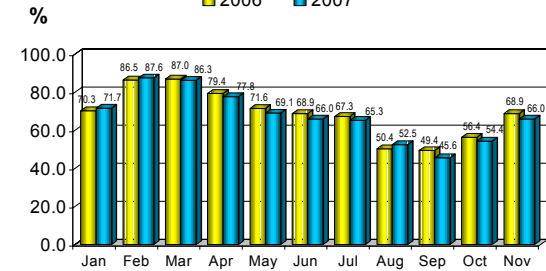
November Visitor Origins (in Thousands)



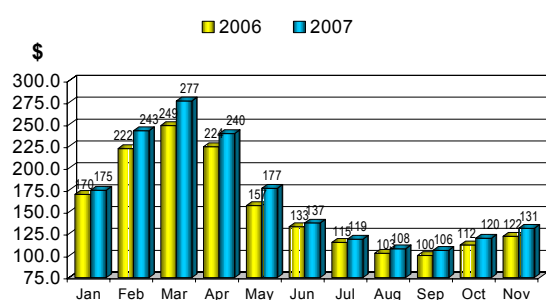
November 2007 Visitor Origins (%)



Occupancy	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.
Occ. 2005	73.1%	91.1%	92.6%	80.7%	73.8%	65.8%	64.0%	48.8%	45.0%	48.6%	67.6%
Occ. 2006	70.3	86.5	87.0	79.4	71.6	68.9	67.3	50.4	49.4	56.4	68.9
Occ. 2007	71.7	87.6	86.3	77.8	69.1	66.0	65.3	52.5	45.6	54.4	66.0
Δ Pts. ('06/'07)	+1.4	+1.1	-0.7	-1.6	-2.5	-2.9	-2.0	+2.1	-3.8	-2.0	-2.9
ADR 2005	\$164.5	\$213.9	\$240.4	\$191.9	\$152.3	\$121.5	\$107.9	\$96.0	\$94.8	\$108.8	\$117.5
ADR 2006	170.0	222.4	248.5	224.3	157.0	132.9	114.9	102.5	99.6	112.1	121.6
ADR 2007	174.7	242.9	276.6	239.5	176.9	137.2	118.9	107.8	106.1	120.3	131.1
Δ % ('06/'07)	+2.8%	+9.2%	+11.3%	+6.8%	+12.7%	+3.2%	+3.5%	+5.2%	+6.5%	+7.3%	+7.8%
RevPAR 2005	\$120.2	\$194.9	\$222.6	\$154.9	\$112.4	\$79.9	\$69.1	\$46.8	\$42.7	\$52.9	\$79.4
RevPAR 2006	119.5	192.4	216.2	178.1	112.4	91.6	77.3	51.7	49.2	63.2	83.8
RevPAR 2007	125.3	212.8	238.7	186.3	122.3	90.6	77.6	56.6	48.4	65.4	86.5
Δ % ('06/'07)	+4.9%	+10.6%	+10.4%	+4.6%	+8.8%	-1.1%	+0.4%	+9.5%	-1.6%	+3.5%	+3.2%

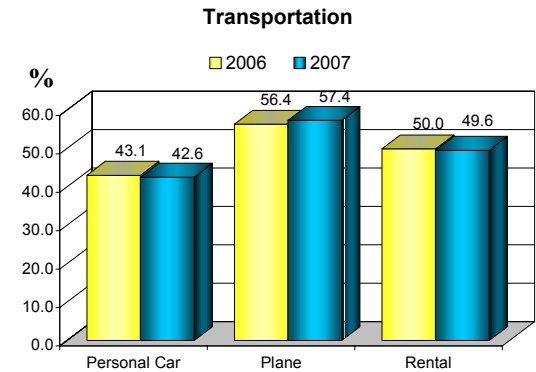


Room Rates

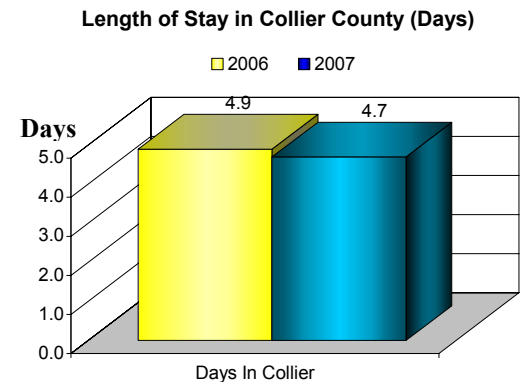
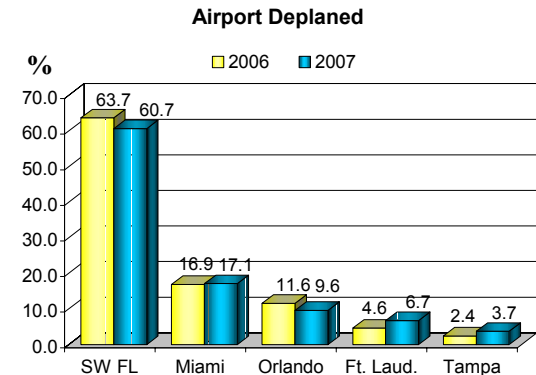


November 2007 Visitor Profile -- Naples, Marco Island, Everglades

	<u>November 2006</u>	<u>November 2007</u>
Transportation Mode (Multiple Response)		
Personal Car	43.1%	42.6%
Plane	56.4	57.4
Rental Car	50.0	49.6
Airport Deplaned (Base: Flew)		
Southwest Florida International	63.7%	60.7%
Miami International	16.9	17.1
Orlando International/Sanford	11.6	9.6
Ft. Lauderdale	4.6	6.7
Tampa International	2.4	3.7

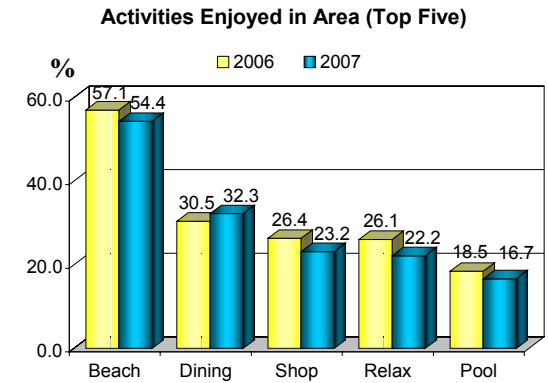


	<u>November 2006</u>	<u>November 2007</u>
Purpose of Trip (Multiple Response)		
Vacation	62.7%	61.8%
Business Travelers/Conferences/Business Meetings	41.3	42.4
Special Events	8.9	13.4
Visit with Friends and Relatives	7.3	6.7
First Visit to Collier County (% Yes)	42.6%	49.8%
Assisted by Travel Agent (% Yes)	8.8%	6.8%
Length of Stay in Collier County (# of days)	4.9 days	4.7 days
Party Size (# of People)	2.3 people	2.0 people
Satisfaction with Collier County		
Very Satisfied	70.0%	72.5%
Satisfied	25.6	19.3
Satisfaction Level (Very Satisfied + Satisfied)	95.6%	91.8%

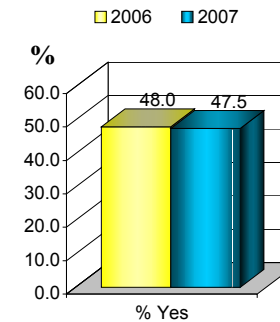


November 2007 Visitor Profile -- Naples, Marco Island, Everglades

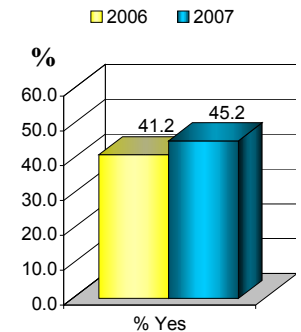
	<u>November 2006</u>	<u>November 2007</u>
Activities Enjoyed in Area (Multiple Response)		
Beach	57.1%	54.4%
Dining Out	30.5	32.3
Shopping	26.4	23.2
Relaxing	26.1	22.2
Pool	18.5	16.7
Walking	15.3	15.1
Golfing	10.9	13.8
Swimming	13.3	11.4
Everglades Adventures	10.2	7.8
Expense Relative to Expectations		
More Expensive	24.5%	21.1%
Less Expensive	0.6	12.2
As Expected	65.0	55.0
Don't Know	9.9	11.9
Recommend Collier to Friends/Relatives		
Yes	93.1%	94.8%
Plan to Return (% Yes)		
To Local Area	85.0%	88.0%
Next Year (Base: Return to Local Area)	56.5	56.8
Median Age Head of Household (Years)	48.2	47.2
Average Annual Household Income	\$182,051	\$189,286
See/Read/Hear Collier Message (% Yes)	48.0%	47.5%
Type of Message Seen (Multiple Response)		
Internet	74.3%	76.7%
Television Ad	14.0	13.9
Newspaper Ad	10.3	11.4
Television Program	14.0	9.7
Magazine Ad	11.7	8.9
Magazine Travel Story	8.8	8.6
Travel Guides/Visitor Guides/Brochures	7.6	5.4
Influenced by Collier Message		
(Base: Respondents Reporting See/Read/Hear Message)	41.2%	45.2%



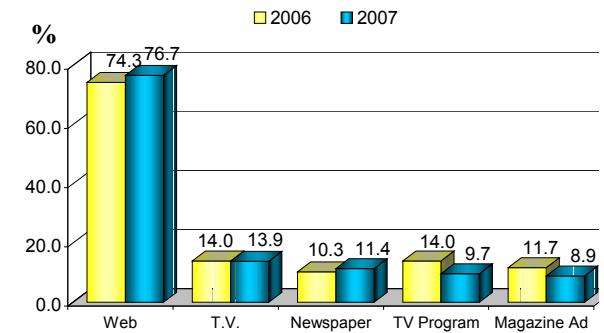
See/Hear/Read Message



Influenced by Message



Type of Message Seen (Top Five)



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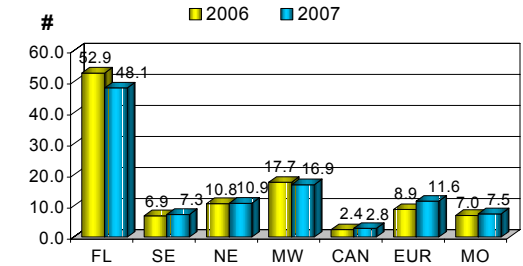
January 28, 2008

December 2007 Visitor Profile – Naples, Marco Island, Everglades

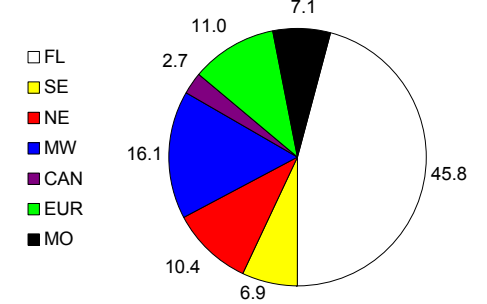
Visitor Volume	Annual 2006	YEAR TO DATE		% Δ	December		% Δ
		2006	2007	'06/'07	2006	2007	'06/'07
Visitors (#)	1,401,711	1,401,711	1,393,820	-0.6	106,700	105,100	-1.5
Room Nights	2,146,012	2,146,012	2,114,710	-1.5	166,730	159,100	-4.6
Direct Exp. (\$)	\$744,349,457	\$744,349,458	\$791,161,855	+6.3	\$65,869,500	\$70,061,100	+6.4

Visitor Origin	YTD # of Visitors (Jan. – Dec.)		% Δ	December 2007 # of Visitors	
	2006	2007	'06/'07	Rel %	2007
Florida	560,796	538,071	-4.1	45.8%	48,136
Southeast	109,742	102,176	-6.9	6.9	7,252
Northeast	239,809	249,452	+4.0	10.4	10,930
Midwest	245,370	246,908	+0.6	16.1	16,921
Canada	33,476	33,612	+0.4	2.7	2,838
Europe	138,859	141,400	+1.8	11.0	11,561
Markets of Opp.	73,659	82,201	+11.6	7.1	7,462
Total	1,401,711	1,393,820	-0.6	100.0	105,100

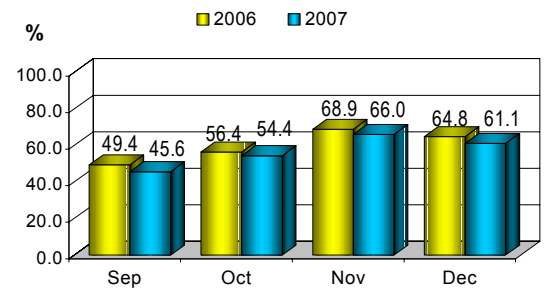
December Visitor Origins (in Thousands)



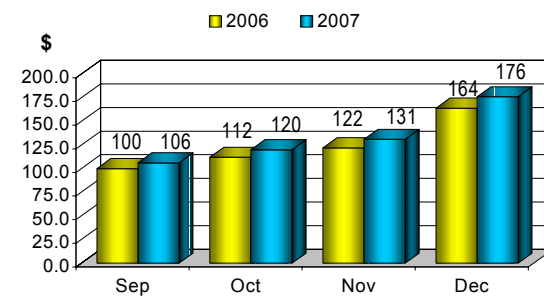
December 2007 Visitor Origins (%)



Occupancy



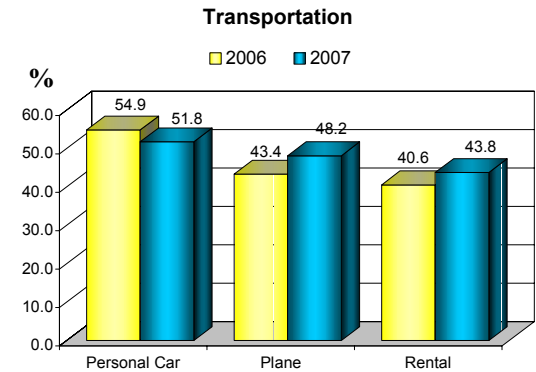
Room Rates



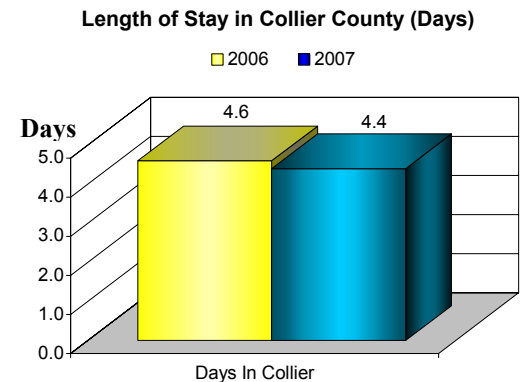
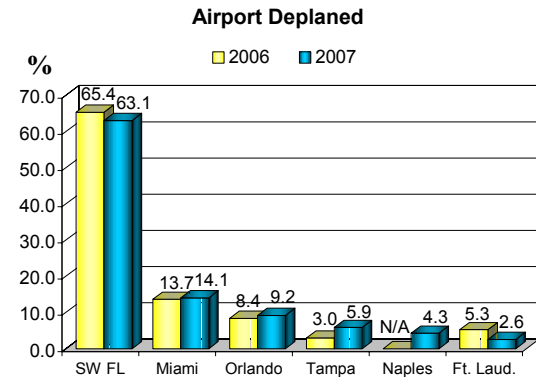
Occupancy	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
Occ. 2005	73.1%	91.1%	92.6%	80.7%	73.8%	65.8%	64.0%	48.8%	45.0%	48.6%	67.6%	65.3%
Occ. 2006	70.3	86.5	87.0	79.4	71.6	68.9	67.3	50.4	49.4	56.4	68.9	64.8
Occ. 2007	71.7	87.6	86.3	77.8	69.1	66.0	65.3	52.5	45.6	54.4	66.0	61.1
Δ Pts. ('06/'07)	+1.4	+1.1	-0.7	-1.6	-2.5	-2.9	-2.0	+2.1	-3.8	-2.0	-2.9	-3.7
ADR 2005	\$164.5	\$213.9	\$240.4	\$191.9	\$152.3	\$121.5	\$107.9	\$96.0	\$94.8	\$108.8	\$117.5	\$151.8
ADR 2006	170.0	222.4	248.5	224.3	157.0	132.9	114.9	102.5	99.6	112.1	121.6	164.2
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
Δ % ('06/'07)	+2.8%	+9.2%	+11.3%	+6.8%	+12.7%	+3.2%	+3.5%	+5.2%	+6.5%	+7.3%	+7.8%	+7.3%
RevPAR 2005	\$120.2	\$194.9	\$222.6	\$154.9	\$112.4	\$79.9	\$69.1	\$46.8	\$42.7	\$52.9	\$79.4	\$99.1
RevPAR 2006	119.5	192.4	216.2	178.1	112.4	91.6	77.3	51.7	49.2	63.2	83.8	106.4
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
Δ % ('06/'07)	+4.9%	+10.6%	+10.4%	+4.6%	+8.8%	-1.1%	+0.4%	+9.5%	-1.6%	+3.5%	+3.2%	+1.2%

December 2007 Visitor Profile -- Naples, Marco Island, Everglades

	<u>December 2006</u>	<u>December 2007</u>
Transportation Mode (Multiple Response)		
Personal Car	54.9%	51.8%
Plane	43.4	48.2
Rental Car	40.6	43.8
Airport Deplaned (Base: Flew)		
Southwest Florida International	65.4%	63.1%
Miami International	13.7	14.1
Orlando International/Sanford	8.4	9.2
Tampa International	3.0	5.9
Naples/Marco Island	N/A	4.3
Ft. Lauderdale	5.3	2.6



	<u>December 2006</u>	<u>December 2007</u>
Purpose of Trip (Multiple Response)		
Vacation	71.0%	72.3%
Business Travelers/Conferences/Business Meetings	29.0	29.4
Visit with Friends and Relatives	7.4	9.0
Special Events	3.2	4.8
First Visit to Collier County (% Yes)	41.9%	37.6%
Assisted by Travel Agent (% Yes)	7.7%	5.9%
Length of Stay in Collier County (# of days)	4.6 days	4.4 days
Party Size (# of People)	2.2 people	2.3 people
Satisfaction with Collier County		
Very Satisfied	69.4%	76.5%
Satisfied	24.6	13.8
Satisfaction Level (Very Satisfied + Satisfied)	94.0%	90.3%
Recommend Collier to Friends/Relatives		
Yes	94.4%	92.4%



December 2007 Visitor Profile -- Naples, Marco Island, Everglades

	<u>December 2006</u>	<u>December 2007</u>
Activities Enjoyed in Area (Multiple Response)		
Dining Out	55.5%	61.2%
Relaxing	55.5	49.1
Beach	48.2	44.5
Shopping	28.3	22.6
Pool	20.2	17.4
Walking	17.6	17.3
Swimming	18.3	17.2
Boating	11.0	14.2
Visit Friends/Relatives	10.2	13.1
Golfing	13.5	11.9
Bars/Nightlife	7.7	10.9
Reading	9.8	8.1
Everglades Adventures	7.9	7.2
Expense Relative to Expectations		
More Expensive	26.6%	19.4%
Less Expensive	4.0	2.7
As Expected	60.9	67.6
Don't Know	8.5	10.3
Plan to Return (% Yes)		
To Local Area	92.6%	93.8%
Next Year (Base: Return to Local Area)	57.4	61.9
Median Age Head of Household (Years)		
	49.4	50.9
Average Annual Household Income		
	\$151,304	\$153,557
See/Read/Hear Collier Message (% Yes)		
	46.7%	44.1%
Type of Message Seen (Multiple Response)		
Internet	74.9%	70.2%
Newspaper Ad	19.8	35.7
Television Ad	15.2	32.8
Magazine Travel Story	19.1	13.0
Magazine Ad	8.2	12.4
Newspaper Travel Story	4.9	5.8
Travel Guides/Visitor Guides/Brochures	3.9	2.6
Influenced by Collier Message		
(Base: Respondents Reporting See/Read/Hear Message)	34.6%	33.7%

