

RESEARCH DATA SERVICES, INC.

405 NORTH REO STREET • SUITE 100
TAMPA, FLORIDA 33609
TEL (813) 254-2975 • FAX (813) 254-2986

Naples, Marco Island, Everglades Convention and Visitors Bureau

January 2008 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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Naples, Marco Island, Everglades: 2007 Year-End Summary

Executive Summary

1. This January's number of overnight visitors to Collier County increased by 3.1%. The destination's Average Daily Rates (ADR) accelerated by 8.9%, with visitor expenditures growing by 13.4%. The economic circumstances in the real estate sector of the economy have created an increase in the inventory of rentable units. Although temporary in nature, this pulsing on the supply side has transferred demand from traditional lodgings yielding a 4.3 point (6.0%) contraction in occupancy.
2. The geographic visitor origin markets for January 2008 are as follows:

<u>Visitor Segments</u>	<u>January</u>		<u>% Δ</u>
	<u>2007</u> <u>Visitor #</u>	<u>2008</u> <u>Visitor #</u>	
Florida	37,058	34,957	- 5.7
Southeast	12,305	11,947	- 2.9
Northeast	39,776	43,070	+ 8.3
Midwest	34,053	37,465	+10.0
Canada	3,720	3,688	- 0.9
Europe	11,446	10,915	- 4.6
Markets of Opportunity	4,722	5,458	+15.6
Total	143,080	147,500	+ 3.1

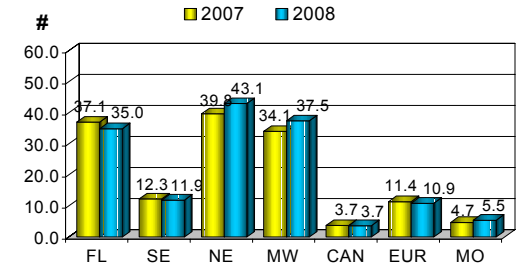
3. This January, fully 66.7% of visitors arrived by air (2006: 63.6%), with the majority of air passengers deplaning at Southwest Florida International (73.6%).
4. Compared to January 2007, this month's visitors commanded a higher level of household income (2006: \$152,976; 2007: \$156,338), with a median age of 53.4 years (2006: 53.1 years).
5. Fully 95.7% of Collier visitors are satisfied with their stay in the destination and the majority (91.7%) are planning a repeat visit (2006: 88.3%).

January 2008 Visitor Profile – Naples, Marco Island, Everglades

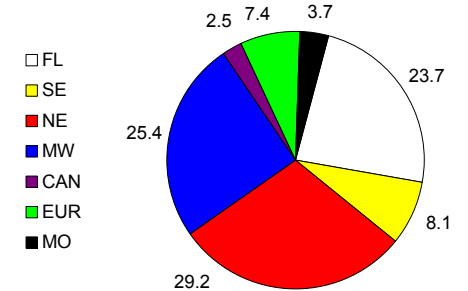
Visitor Volume	Annual 2006	Annual 2007		% Δ '06/'07	January 2008		% Δ '07/'08
	2006	2006	2007		2007	2008	
Visitors (#)	1,401,711	1,401,711	1,393,820	-0.6	143,080	147,500	+3.1
Room Nights	2,146,012	2,146,012	2,114,710	-1.5	200,040	198,500	-0.8
Direct Exp. (\$)	\$744,349,457	\$744,349,458	\$791,161,855	+6.3	\$68,738,470	\$77,922,300	+13.4

Visitor Origin	Annual # of Visitors (Jan. – Dec.)		% Δ '06/'07	January 2008 # of Visitors	
	2006	2007		Rel %	2008
Florida	560,796	538,071	-4.1	23.7%	34,957
Southeast	109,742	102,176	-6.9	8.1	11,947
Northeast	239,809	249,452	+4.0	29.2	43,070
Midwest	245,370	246,908	+0.6	25.4	37,465
Canada	33,476	33,612	+0.4	2.5	3,688
Europe	138,859	141,400	+1.8	7.4	10,915
Markets of Opp.	73,659	82,201	+11.6	3.7	5,458
Total	1,401,711	1,393,820	-0.6	100.0	147,500

January Visitor Origins (in Thousands)

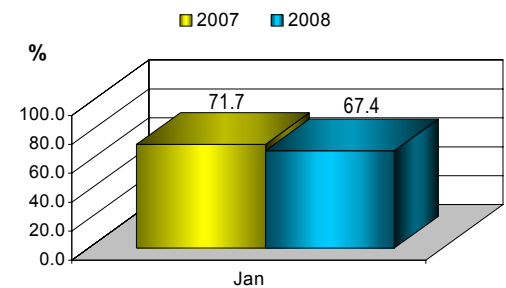


January 2008 Visitor Origins (%)

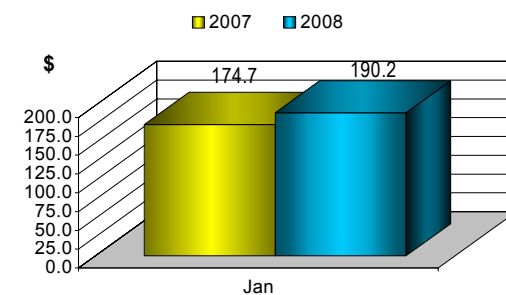


Occupancy	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
Occ. 2006	70.3%	86.5%	87.0%	79.4%	71.6%	68.9%	67.3%	50.4%	49.4%	56.4%	68.9%	64.8%
Occ. 2007	71.7	87.6	86.3	77.8	69.1	66.0	65.3	52.5	45.6	54.4	66.0	61.1
Occ. 2008	67.4											
Δ Pts. ('07/'08)	-4.3											
ADR 2006	\$170.0	\$222.4	\$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
ADR 2008	190.2											
Δ % ('07/'08)	+8.9%											
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
RevPAR 2008	128.2											
Δ % ('07/'08)	+2.3%											

Occupancy

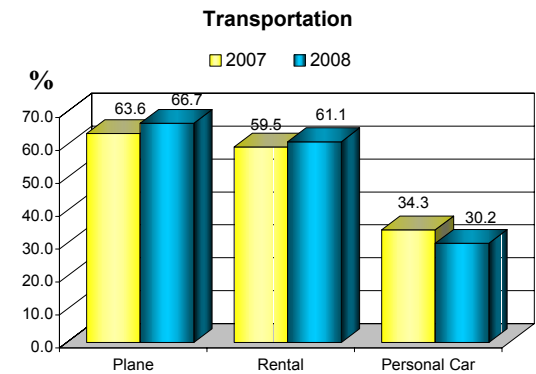


Room Rates

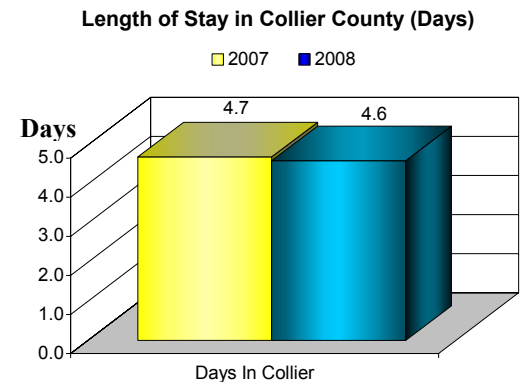
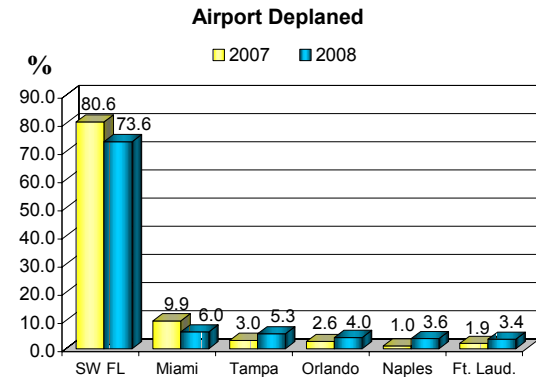


January 2008 Visitor Profile -- Naples, Marco Island, Everglades

	<u>January 2007</u>	<u>January 2008</u>
Transportation Mode (Multiple Response)		
Plane	63.6%	66.7%
Rental Car	59.5	61.1
Personal Car	34.3	30.2
Airport Deplaned (Base: Flew)		
Southwest Florida International	80.6%	73.6%
Miami International	9.9	6.0
Tampa International	3.0	5.3
Orlando International/Sanford	2.6	4.0
Naples/Marco Island	1.0	3.6
Ft. Lauderdale	1.9	3.4



	<u>January 2007</u>	<u>January 2008</u>
Purpose of Trip (Multiple Response)		
Vacation	66.2%	68.0%
Business Travelers/Conferences/Business Meetings	33.6	32.0
Visit with Friends and Relatives	11.4	12.0
Special Events	1.4	2.9
First Visit to Collier County (% Yes)	31.3%	32.2%
Assisted by Travel Agent (% Yes)	6.5%	7.2%
Length of Stay in Collier County (# of days)	4.7 days	4.6 days
Party Size (# of People)	2.1 people	2.2 people
Satisfaction with Collier County		
Very Satisfied	79.1%	80.6%
Satisfied	14.2	15.1
Satisfaction Level (Very Satisfied + Satisfied)	93.3%	95.7%
Recommend Collier to Friends/Relatives		
Yes	92.6%	91.1%



January 2008 Visitor Profile -- Naples, Marco Island, Everglades

	<u>January 2007</u>	<u>January 2008</u>
Activities Enjoyed in Area (Multiple Response)		
Dining Out	64.5%	61.7%
Beach	59.4	54.3
Relaxing	57.1	50.8
Shopping	38.6	32.3
Pool	28.7	23.4
Walking	23.8	19.5
Golfing	22.1	17.9
Reading	19.6	17.4
Visit Friends/Relatives	16.5	16.8
Swimming	23.1	16.4
Sightseeing	12.8	15.9
Everglades Adventures	13.7	15.4
Boating	10.5	12.9
Bars/Nightlife	8.2	10.6
Expense Relative to Expectations		
More Expensive	14.5%	13.9%
Less Expensive	6.4	1.0
As Expected	76.3	78.0
Don't Know	2.9	7.1
Plan to Return (% Yes)		
To Local Area	88.3%	91.7%
Next Year (Base: Return to Local Area)	59.4	62.0
Median Age Head of Household (Years)	53.1	53.4
Average Annual Household Income	\$152,976	\$156,338
See/Read/Hear Collier Message (% Yes)	52.4%	50.5%
Type of Message Seen (Multiple Response)		
Internet	68.6%	68.8%
Newspaper Ad	26.8	25.5
Magazine Travel Story	14.9	15.5
Television Ad	15.7	15.0
Magazine Ad	9.1	14.1
Newspaper Travel Story	13.4	14.0
Travel Guides/Visitor Guides/Brochures	12.1	13.9
Influenced by Collier Message		
(Base: Respondents Reporting See/Read/Hear Message)	51.0%	50.0%

