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Naples, Marco Island, Everglades Convention and Visitors Bureau

February 2008 Visitor Profile



Prepared for:

Collier County Board of County Commissioners
and
Naples, Marco Island, Everglades Convention and Visitors Bureau

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March 17, 2008

Naples, Marco Island, Everglades: February 2008 Summary

Executive Summary

1. February 2008's number of overnight visitors to Collier County increased by 3.3%. The destination's Average Daily Rates (ADR) grew by 9.5%, while visitor expenditures increased by 11.4% (2007: \$101,831,000; 2008: \$113,402,400). The previously noted trend of inventory growth continues to expand the rental pool, with traditional lodging occupancies experiencing a 1.6 point (-1.8%) contraction this February.
2. Collier's geographic visitor origin markets for February 2008 are as follows:

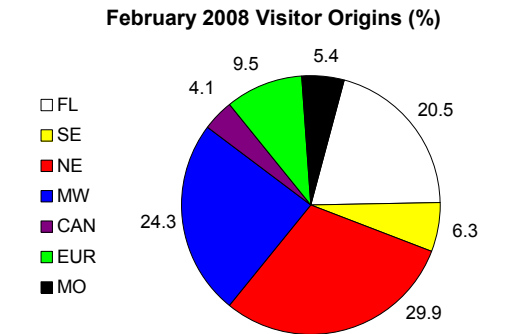
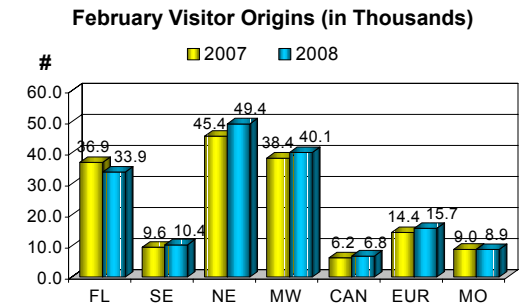
<u>Visitor Segments</u>	<u>February</u>		<u>% Δ</u>
	<u>2007</u> <u>Visitor #</u>	<u>2008</u> <u>Visitor #</u>	
Florida	36,937	33,865	- 8.3
Southeast	9,594	10,408	+ 8.5
Northeast	45,412	49,395	+ 8.8
Midwest	38,376	40,144	+ 4.6
Canada	6,236	6,773	+ 8.6
Europe	14,391	15,694	+ 9.1
Markets of Opportunity	8,954	8,921	- 0.4
Total	159,900	165,200	+ 3.3

3. This month, fully 72.4% of visitors arrived by air (2007: 69.7%). The majority of these visitors deplaned at Southwest Florida International (70.7%).
4. Attracting first time visitors renourishes a destination's share of the market. This February, 30.6% of Collier visitors tried the destination for the first time (2007: 25.4%).
5. While visitors' median age is stable (2008: 53.2 years), median reported household income levels have risen significantly (2007: \$180,694; 2008: \$190,000).
6. The majority of visitors (96.6%) are satisfied with their stay, with 93.8% planning a repeat visit.

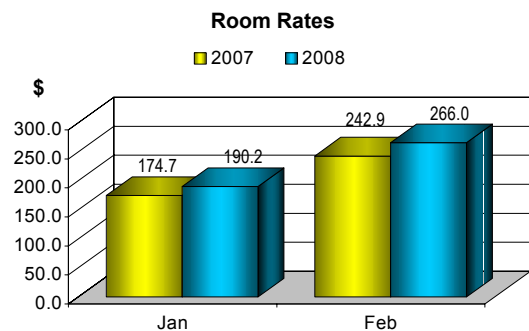
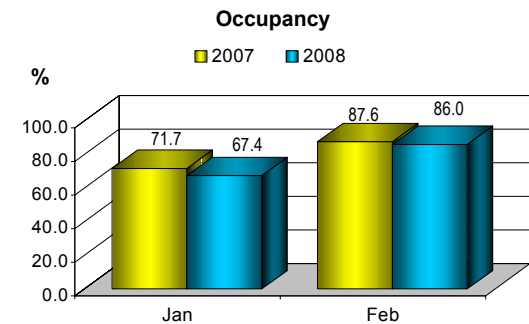
February 2008 Visitor Profile – Naples, Marco Island, Everglades

Visitor Volume	Annual 2007	Year to Date		% Δ	February		% Δ
		2007	2008	'07/'08	2007	2008	'07/'08
Visitors (#)	1,393,820	302,980	312,700	+3.2	159,900	165,200	+3.3
Room Nights	2,114,710	420,790	435,430	+3.5	220,750	236,930	+7.3
Direct Exp. (\$)	\$791,161,855	\$170,569,470	\$191,324,700	+12.2	\$101,831,000	\$113,402,400	+11.4

Visitor Origin	YTD # of Visitors (Jan. & Feb.)		% Δ	February 2008 # of Visitors	
	2007	2008	'07/'08	Rel %	2008
Florida	73,995	68,822	-7.0	20.5%	33,865
Southeast	21,899	22,355	+2.1	6.3	10,408
Northeast	85,188	92,465	+8.5	29.9	49,395
Midwest	72,429	77,609	+7.2	24.3	40,144
Canada	9,956	10,461	+5.1	4.1	6,773
Europe	25,837	26,609	+3.0	9.5	15,694
Markets of Opp.	13,676	14,379	+5.1	5.4	8,921
Total	302,980	312,700	+3.2	100.0	165,200



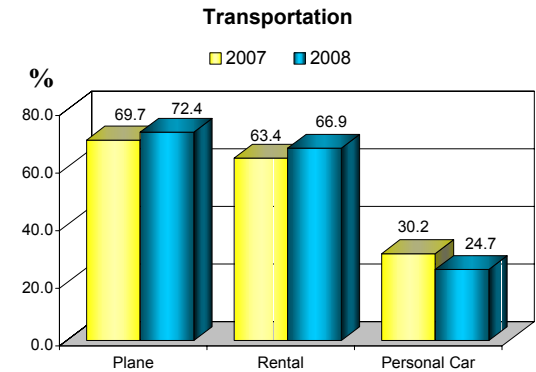
Occupancy	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
Occ. 2006	70.3%	86.5%	87.0%	79.4%	71.6%	68.9%	67.3%	50.4%	49.4%	56.4%	68.9%	64.8%
Occ. 2007	71.7	87.6	86.3	77.8	69.1	66.0	65.3	52.5	45.6	54.4	66.0	61.1
Occ. 2008	67.4	86.0										
Δ Pts. ('07/'08)	-4.3	-1.6										
ADR 2006	\$170.0	\$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	266.0										
Δ % ('07/'08)	+8.9%	+9.5%										
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	228.8										
Δ % ('07/'08)	+2.3%	+7.5%										



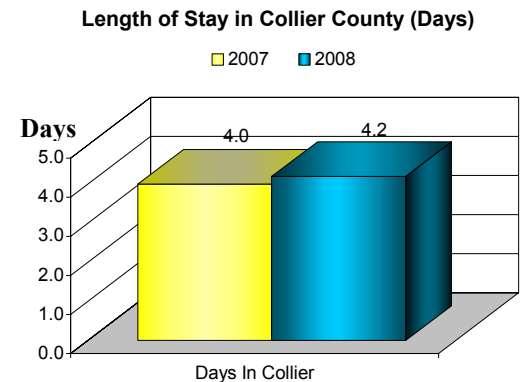
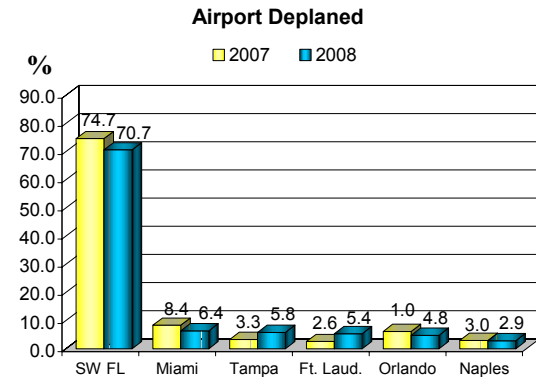
* Note February 2008 was a leap year yielding one additional day over same month last year.

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

	<u>February 2007</u>	<u>February 2008</u>
Transportation Mode <i>(Multiple Response)</i>		
Plane	69.7%	72.4%
Rental Car	63.4	66.9
Personal Car	30.2	24.7
Airport Deplaned <i>(Base: Flew)</i>		
Southwest Florida International	74.7%	70.7%
Miami International	8.4	6.4
Tampa International	3.3	5.8
Ft. Lauderdale	2.6	5.4
Orlando International/Sanford	6.2	4.8
Naples/Marco Island	3.0	2.9

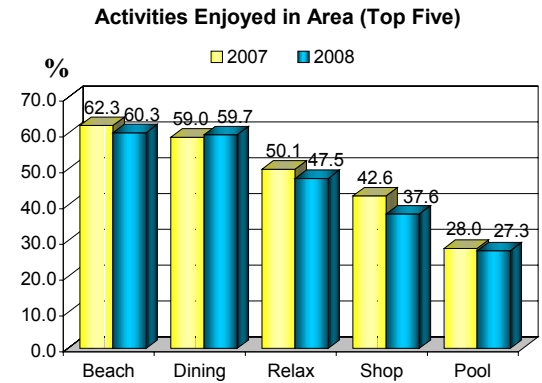


	<u>February 2007</u>	<u>February 2008</u>
Purpose of Trip <i>(Multiple Response)</i>		
Vacation	65.1%	72.7%
Business Travelers/Conferences/Business Meetings	26.2	24.9
Visit with Friends and Relatives	18.5	14.0
First Visit to Collier County (% Yes)	25.4%	30.6%
Assisted by Travel Agent (% Yes)	7.4%	9.7%
Length of Stay in Collier County (# of days)	4.0 days	4.2 days
Party Size (# of People)	2.4 people	2.3 people
Satisfaction with Collier County		
Very Satisfied	77.8%	86.0%
Satisfied	16.1	10.6
Satisfaction Level <i>(Very Satisfied + Satisfied)</i>	93.9%	96.6%
Recommend Collier to Friends/Relatives		
Yes	93.2%	93.9%

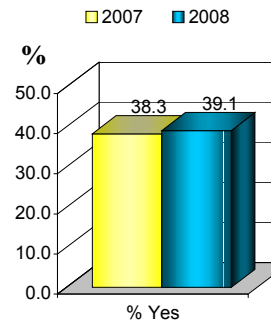


February 2008 Visitor Profile -- Naples, Marco Island, Everglades

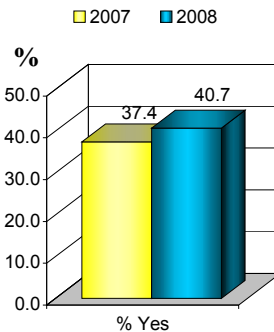
	<u>February 2007</u>	<u>February 2008</u>
Activities Enjoyed in Area (Multiple Response)		
Beach	62.3%	60.3%
Dining Out	59.0	59.7
Relaxing	50.1	47.5
Shopping	42.6	37.6
Pool	28.0	27.3
Golfing	16.0	19.4
Walking	15.6	18.3
Swimming	18.8	18.2
Visit Friends/Relatives	19.4	15.9
Everglades Adventures	11.5	14.5
Boating	10.7	14.2
Sightseeing	16.5	10.5
Reading	14.8	10.5
Bars/Nightlife	7.7	7.8
Expense Relative to Expectations		
More Expensive	20.4%	13.8%
Less Expensive	N/A	1.4
As Expected	76.4	79.7
Don't Know	3.2	5.1
Plan to Return (% Yes)		
To Local Area	95.2%	93.8%
Next Year (Base: Return to Local Area)	70.0	68.3
Median Age Head of Household (Years)	52.4	53.2
Average Annual Household Income	\$180,694	\$190,000
See/Read/Hear Collier Message (% Yes)	38.3%	39.1%
Type of Message Seen (Multiple Response)		
Internet	69.0%	70.9%
Newspaper Ad	28.5	28.0
Travel Guides/Visitor Guides/Brochures	28.5	27.5
Television Ad	14.6	15.6
Magazine Ad	7.0	14.9
Newspaper Travel Story	9.3	13.6
Magazine Travel Story	7.4	11.8
Influenced by Collier Message		
(Base: Respondents Reporting See/Read/Hear Message)	37.4%	40.7%



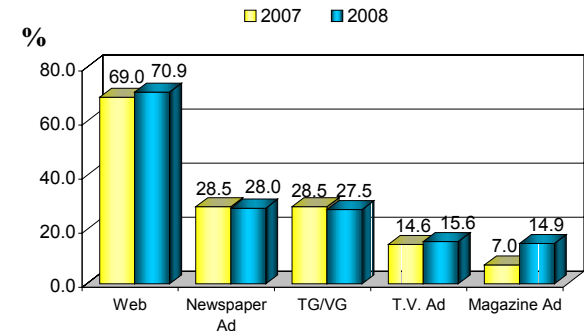
See/Hear/Read Message



Influenced by Message



Type of Message Seen (Top Five)



INTERNATIONAL VISITATION

COLLIER COUNTY 2007

ORIGIN	# VISITORS	SHARE OF EUROPEAN	SHARE OF TOTAL VISITORS	TOTAL EXPEND.	PER PERSON EXPEND.
CENTRAL EUROPE	49,561	35.1%	3.6%	\$37,269,900	
UK	70,323	49.7%	5.0%	\$49,015,100	
OTHER EUROPEAN	21,516	15.2%	1.5%	13,920,800	
TOTAL EUROPEAN	141,400	100.0%	10.1%	\$100,205,800	\$708.67
TOTAL U.S. and CANADIAN	1,252,420		89.9%	\$690,956,055	\$551.70
TOTAL ALL VISITORS	1,393,820		100.0%	\$791,161,855	

INTERNATIONAL COMPARISONS

LEE COUNTY 2006

TOTAL EUROPEAN	197,970	9.5%	\$703.30
TOTAL ALL VISITORS	2,074,400		

PINELLAS COUNTY 2007

TOTAL EUROPEAN	873,656	16.5%	\$694.68
TOTAL ALL VISITORS	5,300,220		

CHARLOTTE COUNTY 2007

TOTAL EUROPEAN	20,818	7.2%	N/A
TOTAL ALL VISTORS	287,360		