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Naples, Marco Island, Everglades Convention and Visitors Bureau

March 2008 Visitor Profile



Prepared for:

Collier County Board of County Commissioners

and

Naples, Marco Island, Everglades Convention and Visitors Bureau

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Naples, Marco Island, Everglades: March 2008 Summary

Executive Summary

1. March 2008 brought some 191,000 overnight visitors to the destination (+3.7%), creating a total economic impact on the County of \$206,250,328 (+9.9%). Comparing same month last year data documents that the destination's Average Daily Rates (ADR) increased by 4.9%, while occupancy contracted by 1.7 points (-2.0%).
2. Collier's geographic visitor origin markets for March 2008 are as follows:

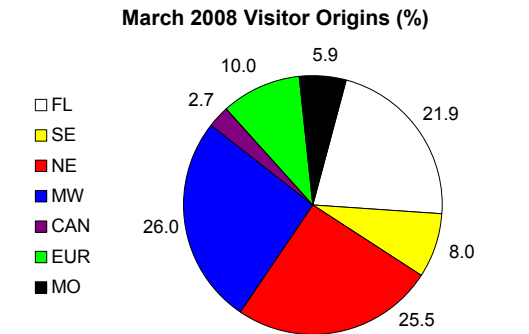
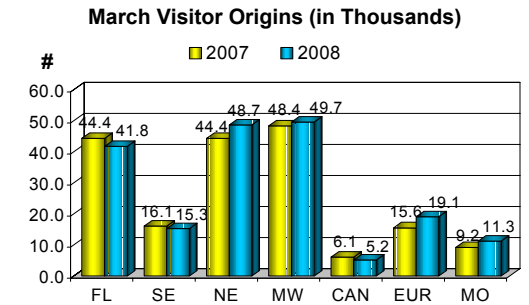
<u>Visitor Segments</u>	<u>March</u>			
	<u>2007 Visitor #</u>	<u>2008 Visitor #</u>	<u>Δ in #</u>	<u>% Δ</u>
Florida	44,390	41,829	-2,561	- 5.8
Southeast	16,101	15,280	- 821	- 5.1
Northeast	44,402	48,705	+4,303	+ 9.7
Midwest	48,392	49,660	+1,268	+ 2.6
Canada	6,121	5,157	- 964	-15.7
Europe	15,573	19,100	+3,527	+22.6
Markets of Opportunity	9,221	11,269	+2,048	+22.2
Total	184,200	191,000	+6,800	+ 3.7

3. This month, a majority (71.6%) of visitors used air transportation to reach the destination (2007: 68.1%). Fully 73.6% of these visitors deplaned at Southwest Florida International.
4. This March, some 41.0% of visitors were in Collier County for the first time - a significant increase over the March 2007 level of 25.2%.
5. While visitors' median age decreased slightly (2007: 48.1 years; 2008: 47.7 years), median reported household income levels rose to \$151,071 this March (2007: \$148,889).
6. March visitors are significantly less likely to rate the destination as "more expensive" than they expected (2007: 26.8%; 2008: 15.7%). The majority of visitors (97.1%) are satisfied with their stay, with 92.0% planning a repeat visit.

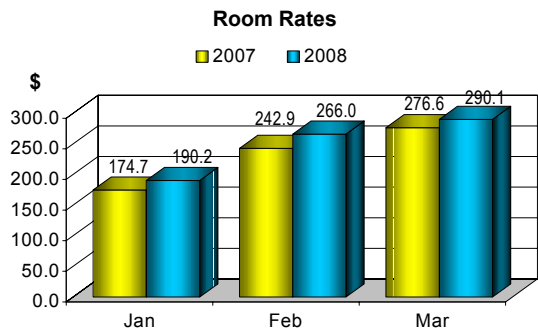
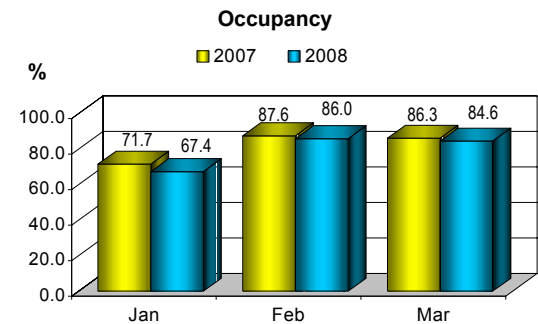
March 2008 Visitor Profile – Naples, Marco Island, Everglades

Visitor Volume	Annual 2007	Year to Date		% Δ	March		% Δ
		2007	2008	'07/'08	2007	2008	'07/'08
Visitors (#)	1,393,820	487,180	503,700	+3.4	184,200	191,000	+3.7
Room Nights	2,114,710	666,890	684,580	+2.7	246,100	249,150	+1.2
Direct Exp. (\$)	\$791,161,855	\$296,431,415	\$329,654,900	+11.2	\$125,861,945	\$138,330,200	+9.9

Visitor Origin	YTD # of Visitors (Jan. - Mar.)		% Δ	March 2008 # of Visitors	
	2007	2008	'07/'08	Rel %	2008
Florida	118,385	110,651	-6.5	21.9%	41,829
Southeast	38,000	37,635	-1.0	8.0	15,280
Northeast	129,590	141,170	+8.9	25.5	48,705
Midwest	120,821	127,269	+5.3	26.0	49,660
Canada	16,077	15,618	-2.9	2.7	5,157
Europe	41,410	45,709	+10.4	10.0	19,100
Markets of Opp.	22,897	25,648	+12.0	5.9	11,269
Total	487,180	503,700	+3.4	100.0	191,000

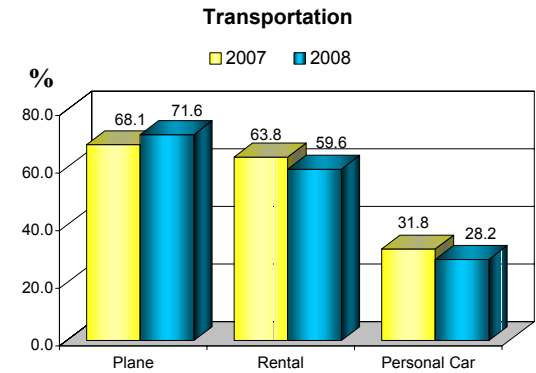


Occupancy	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
Occ. 2006	70.3%	86.5%	87.0%	79.4%	71.6%	68.9%	67.3%	50.4%	49.4%	56.4%	68.9%	64.8%
Occ. 2007	71.7	87.6	86.3	77.8	69.1	66.0	65.3	52.5	45.6	54.4	66.0	61.1
Occ. 2008	67.4	86.0	84.6									
Δ Pts. ('07/'08)	-4.3	-1.6	-1.7									
ADR 2006	\$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	290.1									
Δ % ('07/'08)	+8.9%	+9.5%	+4.9%									
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	228.8	245.4									
Δ % ('07/'08)	+2.3%	+7.5%	+2.8%									

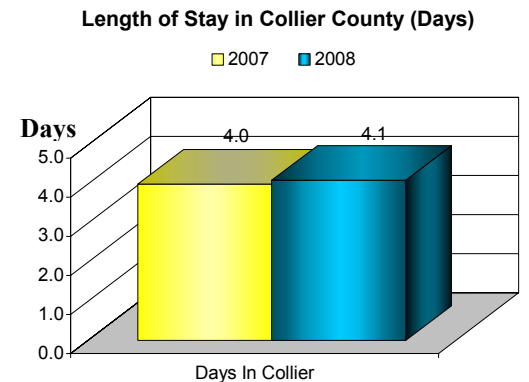
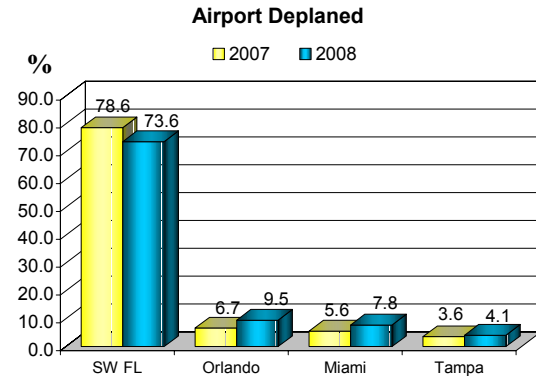


March 2008 Visitor Profile -- Naples, Marco Island, Everglades

	<u>March 2007</u>	<u>March 2008</u>
Transportation Mode (Multiple Response)		
Plane	68.1%	71.6%
Rental Car	63.8	59.6
Personal Car	31.8	28.2
Airport Deplaned (Base: Flew)		
Southwest Florida International	78.6%	73.6%
Orlando International/Sanford	6.7	9.5
Miami International	5.6	7.8
Tampa International	3.6	4.1



	<u>March 2007</u>	<u>March 2008</u>
Purpose of Trip (Multiple Response)		
Vacation	65.5%	67.2%
Business Travelers/Conferences/Business Meetings	21.6	20.5
Visit with Friends and Relatives	15.7	17.2
First Visit to Collier County (% Yes)	25.2%	41.0%
Assisted by Travel Agent (% Yes)	8.7%	10.8%
Length of Stay in Collier County (# of days)	4.0 days	4.1 days
Party Size (# of People)	2.5 people	2.6 people
Satisfaction with Collier County		
Very Satisfied	78.7%	79.2%
Satisfied	16.8	17.9
Satisfaction Level (Very Satisfied + Satisfied)	95.5%	97.1%
Recommend Collier to Friends/Relatives		
Yes	95.3%	94.3%



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

	<u>March 2007</u>	<u>March 2008</u>
Activities Enjoyed in Area (Multiple Response)		
Beach	81.8%	87.7%
Relaxing	77.2	73.3
Dining Out	69.1	66.1
Pool	55.5	50.0
Shopping	46.7	41.3
Swimming	38.8	39.2
Visit Friends/Relatives	31.9	38.0
Sightseeing	35.5	30.5
Walking	26.6	20.9
Reading	26.2	20.3
Golfing	17.0	19.0
Shelling	15.4	18.8
Everglades Adventures	9.6	14.7
Expense Relative to Expectations		
More Expensive	26.8%	15.7%
Less Expensive	N/A	1.1
As Expected	69.1	75.4
Don't Know	4.1	7.8
Plan to Return (% Yes)		
To Local Area	95.2%	92.0%
Next Year (Base: Return to Local Area)	73.2	76.0
Median Age Head of Household (Years)		
	48.1	47.7
Average Annual Household Income		
	\$148,889	\$151,071
See/Read/Hear Collier Message (% Yes)		
	34.2%	40.1%
Type of Message Seen (Multiple Response)		
Internet	75.0%	76.9%
Newspaper Ad	25.0	22.8
Travel Guides/Visitor Guides/Brochures	17.7	16.5
Newspaper Travel Story	10.8	14.7
Television Ad	19.8	13.4
Magazine Ad	9.2	13.2
Magazine Travel Story	7.6	11.0
Influenced by Collier Message		
(Base: Respondents Reporting See/Read/Hear Message)	33.6%	42.8%

