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Naples, Marco Island, Everglades Convention and Visitors Bureau

April 2008 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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May 29, 2008

Naples, Marco Island, Everglades: April 2008 Summary

Executive Summary

1. Although this April's lodging ADR rolled back by 2.8% and occupancy contracted by 3.1%, the ranks of visitors grew slightly. April 2008 saw 112,460 travelers in the Naples, Marco Island, Everglades area. Tourism's total economic impact on Collier County equated to \$141,425,331 (+4.0%).
2. April 2008 saw a notable increase of visitors from the Northeastern, Midwestern, and European markets. Specifically:

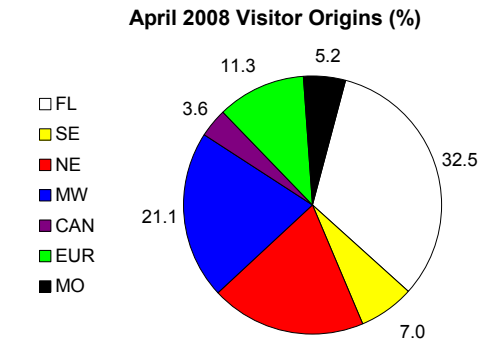
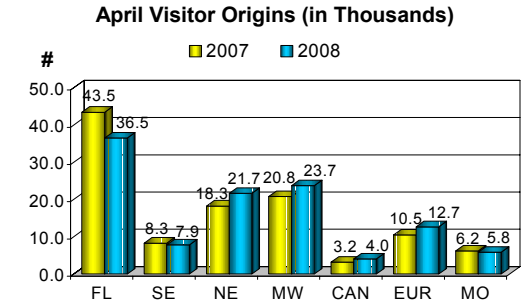
<u>Visitor Segments</u>	<u>April</u>			
	<u>2007 Visitor #</u>	<u>2008 Visitor #</u>	<u>Δ in #</u>	<u>% Δ</u>
Florida	43,473	36,549	-6,924	-15.9
Southeast	8,317	7,872	- 445	- 5.4
Northeast	18,299	21,705	+3,406	+18.6
Midwest	20,849	23,729	+2,880	+13.8
Canada	3,216	4,049	+ 833	+25.9
Europe	10,536	12,708	+2,172	+20.6
Markets of Opportunity	6,210	5,848	- 362	- 5.8
Total	110,900	112,460	+1,560	+ 1.4

3. Southwest Florida International is the primary travel catalyst for the destination's tourism industry. Thus April's contraction in the Airport's passenger traffic (-9.8%) also impacted the Naples, Marco Island, Everglades area. Last year, 71.7% of Collier tourists who flew deplaned via RSW -- only 66.2% arrived through the airport this month. Notably, Orlando and South Florida airports brought more travelers to Collier in April 2008.
4. This April, some 5.9% of visitors were in Florida and Collier for the first time (2007: 4.7%). Additionally, 39.6% had visited other Florida destinations, but chose the Naples, Marco Island, Everglades area for the first time this month.
5. April visitors are significantly more satisfied with their stay (2007: 90.4%; 2008: 96.3%). Nine out of ten (90.2%) are planning a future visit.
6. On balance, our visitors are wealthier this April (2007: \$115,671; 2008: \$120,545).

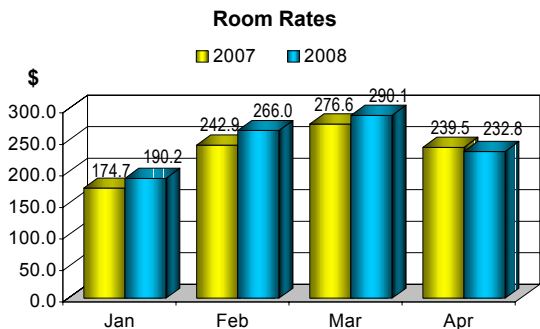
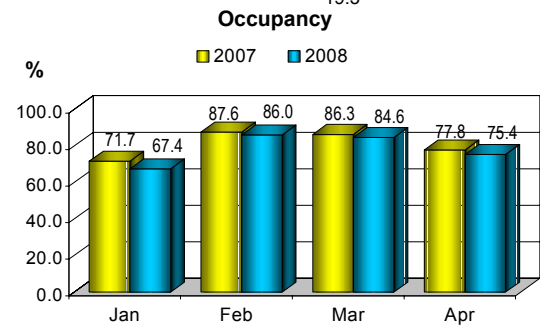
April 2008 Visitor Profile – Naples, Marco Island, Everglades

Visitor Volume	Annual 2007	Year to Date		% Δ '07/'08	April		% Δ '07/'08
		2007	2008		2007	2008	
Visitors (#)	1,393,820	598,080	616,160	+3.0	110,900	112,460	+1.4
Room Nights	2,114,710	865,280	876,850	+1.3	198,390	192,270	-3.1
Direct Exp. (\$)	\$791,161,855	\$387,602,065	\$424,507,570	+9.5	\$91,170,650	\$94,852,670	+4.0

Visitor Origin	YTD # of Visitors (Jan. - Apr.)		% Δ '07/'08	April 2008 # of Visitors	
	2007	2008		Rel %	2008
Florida	161,858	147,200	-9.1	32.5%	36,549
Southeast	46,317	45,507	-1.7	7.0	7,872
Northeast	147,889	162,875	+10.1	19.3	21,705
Midwest	141,670	150,998	+6.6	21.1	23,729
Canada	19,293	19,667	+1.9	3.6	4,049
Europe	51,946	58,417	+12.5	11.3	12,708
Markets of Opp.	29,107	31,496	+8.2	5.2	5,848
Total	598,080	616,160	+3.0	100.0	112,460

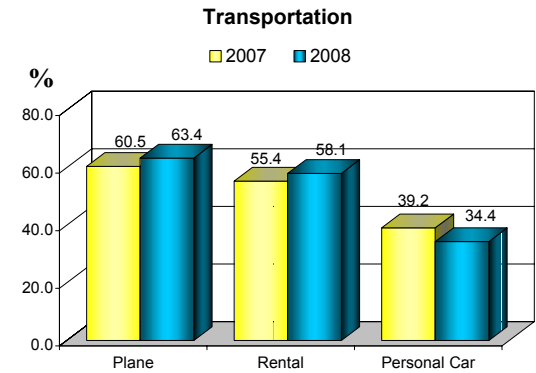


Occupancy	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
Occ. 2006	70.3%	86.5%	87.0%	79.4%	71.6%	68.9%	67.3%	50.4%	49.4%	56.4%	68.9%	64.8%
Occ. 2007	71.7	87.6	86.3	77.8	69.1	66.0	65.3	52.5	45.6	54.4	66.0	61.1
Occ. 2008	67.4	86.0	84.6	75.4								
Δ Pts. ('07/'08)	-4.3	-1.6	-1.7	-2.4								
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	232.8								
Δ % ('07/'08)	+8.9%	+9.5%	+4.9%	-2.8%								
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	175.5								
Δ % ('07/'08)	+2.3%	+7.5%	+2.8%	-5.8%								

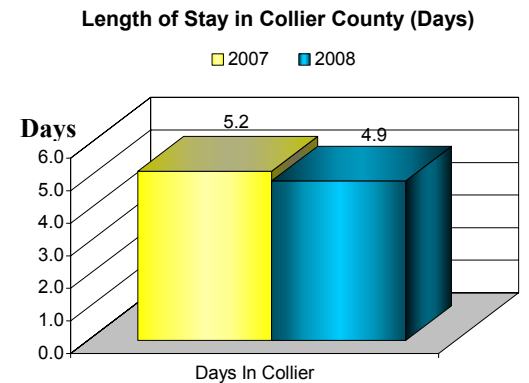
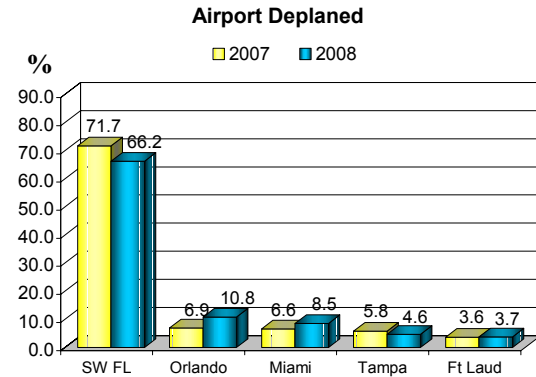


April 2008 Visitor Profile -- Naples, Marco Island, Everglades

	<u>April 2007</u>	<u>April 2008</u>
Transportation Mode <i>(Multiple Response)</i>		
Plane	60.5%	63.4%
Rental Car	55.4	58.1
Personal Car	39.2	34.4
Airport Deplaned <i>(Base: Flew)</i>		
Southwest Florida International	71.7%	66.2%
Orlando International/Sanford	6.9	10.8
Miami International	6.6	8.5
Tampa International	5.8	4.6
Fort Lauderdale International	3.6	3.7

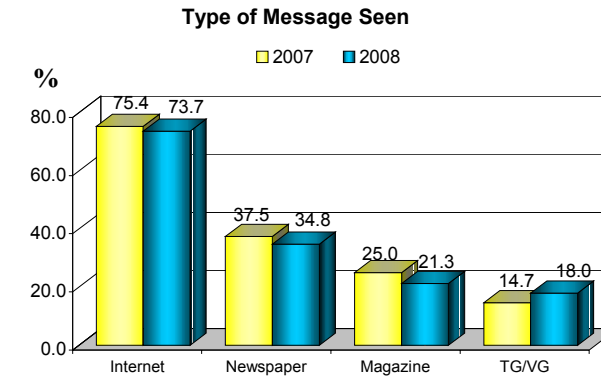
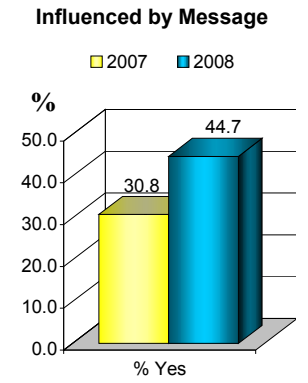
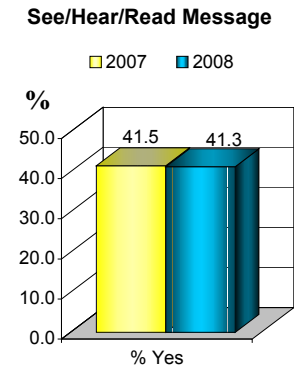
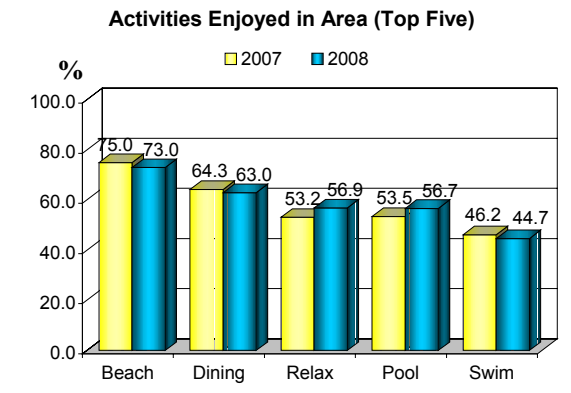


	<u>April 2007</u>	<u>April 2008</u>
Purpose of Trip <i>(Multiple Response)</i>		
Vacation	65.8%	69.4%
Business Travelers/Conferences/Business Meetings	22.8	23.7
Visit with Friends and Relatives	12.4	7.4
First Visit to Collier County (% Yes)	45.6%	45.5%
Assisted by Travel Agent (% Yes)	8.8%	9.8%
Length of Stay in Collier County (# of days)	5.2 days	4.9 days
Party Size (# of People)	2.6 people	2.7 people
Satisfaction with Collier County		
Very Satisfied	77.0%	85.0%
Satisfied	13.4	11.3
Satisfaction Level <i>(Very Satisfied + Satisfied)</i>	90.4%	96.3%
Recommend Collier to Friends/Relatives		
Yes	89.8%	92.9%



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

	<u>April 2007</u>	<u>April 2008</u>
Activities Enjoyed in Area (Multiple Response)		
Beach	75.0%	73.0%
Dining Out	64.3	63.0
Relaxing	53.2	56.9
Pool	53.5	56.7
Swimming	46.2	44.7
Shopping	44.4	42.1
Sightseeing	26.1	28.7
Walking	19.8	20.1
Visit Friends/Relatives	21.4	19.8
Reading	20.6	19.8
Shelling	14.3	15.2
Golfing	14.2	11.8
Everglades Adventures	10.3	9.0
Expense Relative to Expectations		
More Expensive	16.4%	9.2%
Less Expensive	5.5	4.3
As Expected	64.1	77.7
Don't Know	14.1	8.7
Plan to Return (% Yes)		
To Local Area	89.3%	90.2%
Next Year (Base: Return to Local Area)	70.3	68.8
Median Age Head of Household (Years)	46.8	46.7
Average Annual Household Income	\$115,671	\$120,545
See/Read/Hear Collier Message (% Yes)	41.5%	41.3%
Type of Message Seen (Multiple Response)		
Internet	75.4%	73.7%
Newspaper	37.5	34.8
Magazine	25.0	21.3
Travel Guides/Visitor Guides/Brochures	14.7	18.0
Influenced by Collier Message (Base: Respondents Reporting See/Read/Hear Message)		
	30.8%	44.7%



RESEARCH DATA SERVICES, INC.

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6 of 10

TRANSMITTAL SHEET

TO: Mr. Jack Wert, Executive Director
FROM: Walter J. Klages, Ph.D.

COMPANY: Greater Naples, Marco Island & Everglades CVB
DATE: June 13, 2008

PHONE NUMBER: (239) 403-2384
RE: May 2008 Collier Tourism Data

URGENT FOR REVIEW PLEASE COMMENT PLEASE REPLY PLEASE RECYCLE

NOTES/COMMENTS:

Jack:

The following update represents the **Preliminary** May 2008 tourism statistics for Collier County:

May 2008

	<u>2007</u>	<u>2008</u>	<u>Change</u>
Occupancy	69.1%	68.9% (p)	-0.2 pts.
Average Daily Rate (ADR)	\$176.9	\$168.7 (p)	-4.6%
Number of Visitors	116,700	119,100 (p)	+2.1%
Expenditures	\$72,823,000	\$75,984,900 (p)	+4.3%
Rev Par	\$122.3	\$116.2 (p)	-5.0%
Room Nights	184,200	185,800 (p)	+0.9%

Please call if you have any questions or need any additional data.

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NAPLES, MARCO ISLAND, EVERGLADES:
2007-2008 CONVERSION RESEARCH



Prepared for:

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

Prepared by:

Walter J. Klages, Ph.D., Chief Executive Officer
Research Data Services, Inc.

June 2008

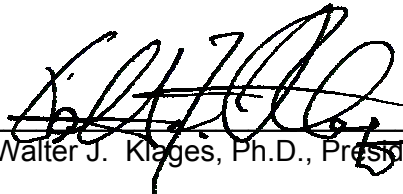


Naples, Marco Island, Everglades CVB: 2007-2008 Inquiry Conversion Research

CERTIFICATION

RESEARCH DATA SERVICES, INC. hereby certifies that, except as otherwise noted in this report:

1. We have no present or contemplated future interest in the project that is the subject of this study.
2. We have no personal interest or bias with respect to the subject matter of this report or the parties involved.
3. This report is based on estimates, assumptions, and other information developed from our research of the market, our knowledge of the industry, and our discussions with you and your representatives, during which we were provided with certain information. The sources of information and the bases of estimates and assumptions are stated herein. To the best of our knowledge and belief, the statements of fact contained in this report, upon which analyses, opinions, and conclusions expressed herein are based, are true and correct.
4. This report sets forth all of the limiting conditions (imposed by the terms of our assignment or by the undersigned) affecting the analyses, opinions, and conclusions contained in this report.
5. The underlying assumptions are based on present circumstances and information currently available.
6. Because circumstances may change and unanticipated events may occur subsequent to the date of this report, the reader must evaluate the assumptions and rationale of this report in light of the circumstances then prevailing. The terms of this engagement are such that we have no obligation to revise this report or the included projections to reflect events or conditions which occur subsequent to the completion of our fieldwork.



Walter J. Klages, Ph.D., President

June 12, 2007

Date

FINDINGS AND CONCLUSIONS

The 2007-2008 Collier County Inquiry Conversion research was conducted as a stratified random sample extracted from the Convention and Visitor's Bureau (CVB) inquiry response and email list records. The study results detailed below represent 764 completed surveys with parties who inquired about the area. The 95% level of confidence was applied to this study as the professionally accepted precision parameter. In terms of the proportion of respondents who had, at the time of the survey, visited Collier County, the standard error associated with the study's findings does not exceed $\pm 3.4\%$.

The study was designed to describe the characteristics and preferences of consumers who contact the destination seeking information about the Naples, Marco Island, Everglades area. The Naples, Marco Island, Everglades CVB presently fulfills information requests generated by Internet contacts/emails, reader response cards, toll-free 800 number calls, and a variety of other media, to induce potential visitation to the destination.

The principal findings and conclusions of the 2007-2008 research are as follows:

1. At the time of the survey, some 38.0% of those who inquired had already visited Collier County, while an additional 27.5% were still planning to visit the destination.
2. People who inquire about Collier County are primarily attracted by the beaches, the opportunity for relaxation, the good weather, and the tropical atmosphere. The proportion of respondents mentioning nature and culture as destination attractors has increased significantly since the 2006 conversion (Nature: 2006: 10.4%; 2007: 40.6% / Culture: 2006: 6.3%; 2007: 13.1%).
3. Fully 87.2% of the inquirers who had visited at the time of the survey remember receiving specific information about the area (2006: 84.0%). Over one third (36.2%) of these visitors used the information to select a Collier lodging for their trip.

Naples, Marco Island, Everglades CVB: 2007-2008 Inquiry Conversion Research 10 of 10

4. Fully 95.2% of Collier visitors report using the Internet to get travel information. Of these, 90.1% say they book travel through the Internet, most prominently for airline reservations, lodging/resort reservations, and rental car reservations.
5. Only 7.6% of the visitors report being assisted by a travel agent with arrangements for their Collier trip.
6. Taking a vacation (87.2%) and/or visiting with friends and relatives (20.8%) are the primary reasons cited by respondents for visiting the Naples, Marco Island, Everglades area.
7. The average travel party includes 2.8 people and typically stays in the destination for 6.1 nights.
8. Air transportation (lift) is the primary travel mode for area visitors. Seven out of ten visitors (69.7%) traveled by plane, with two-thirds of these (63.4%) deplaning at Southwest Florida International Airport.
9. A strong majority of the respondents (87.9%) say they will return to the area. Reflecting increased uncertainty, fully 43.5% of these plan to visit again next year (2006: 60.9%).
10. Correlating inquiries and visitation indicates that **every dollar of promotional and advertising expenditure supports \$20.87 of direct visitor expenditures (2006: \$18.71)**. The total economic impact of inquirers who have visited the Naples, Marco Island, Everglades area is \$62,222,574. Their expenditures yielded an estimated \$2,253,534 in state sales and use tax collections and \$653,813 of resort tax collections (at 4%).

The above estimates are conservative since the analysis does not address the future impact of those visitors who are still planning to travel to the destination.