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2002 Annual Visitor Profile -- Lee County



Prepared for:

Lee County Board of County Commissioners
and
Lee Island Coast Visitor and Convention Bureau

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Lee County -- 2002 Annual Visitor Profile
Executive Summary

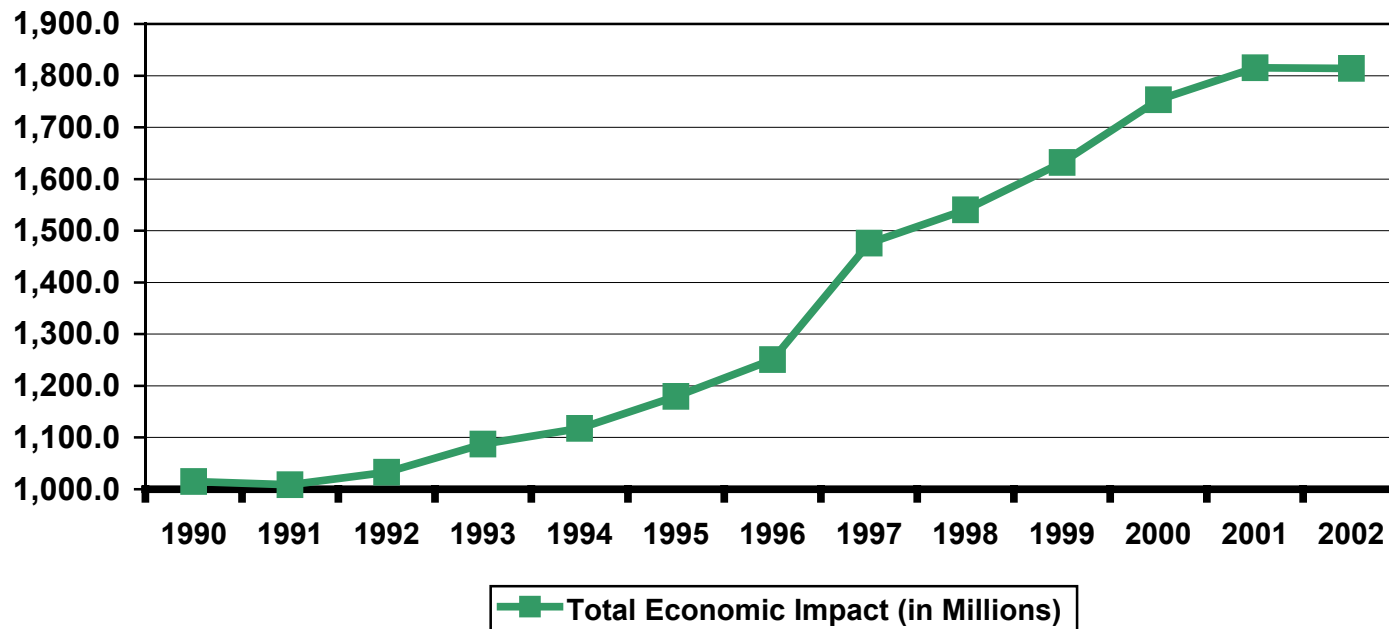


The Visitor Profile of Lee County: 2002 Year-End Summary

Executive Summary

1. In the history of the Lee County Tourist Development Council, the last two years have unquestionably been most challenging. The combination of recession, terrorism, and the threat of war deeply affected all of our origin markets. Yet, despite the turmoil and uncertainty that unsettled the nation's travel markets, Lee was able to sustain both its market presence and the essential "value added" of its tourism industry. In 2002, the total economic impact of Lee visitation left better than \$1.8 billion dollars in expenditures circulating throughout the County's economy.

Lee County H/M/C/C Visitors Total Economic Impact

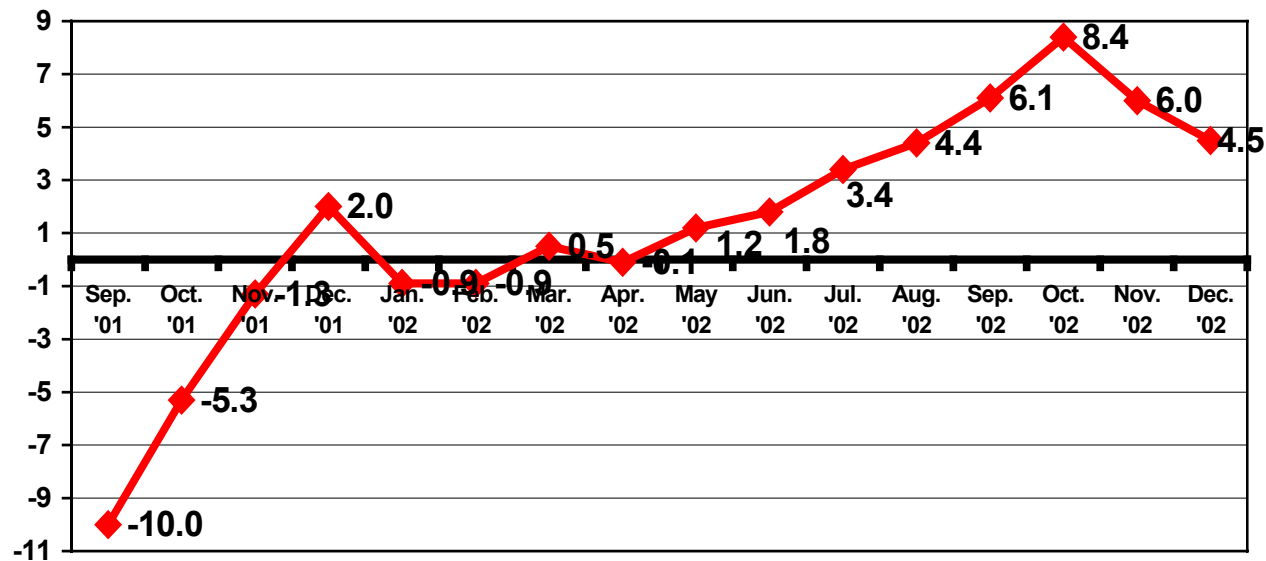


The Visitor Profile of Lee County: 2002 Year-End Summary

2. The principle objective of Lee's tourism development program is the growth and expansion of economic activity during the Shoulder Season. Looking back over the past 17 years (for which consistent tracking data are available) documents the spectacular success of this endeavor. In terms of dollar expenditures, Lee's Spring/Summer business grew by 160.8% (May – August), while the Fall Shoulder Season has increased by 131.3% (September – December). In contrast, over the same period, Winter Season expenditures (the traditional highpoint in the industry's cycle) expanded by 108.5%.

3. Throughout 2002, the destination's marketing presence and goodwill residual in its domestic markets helped to compensate for substantial rollbacks in foreign visitation.

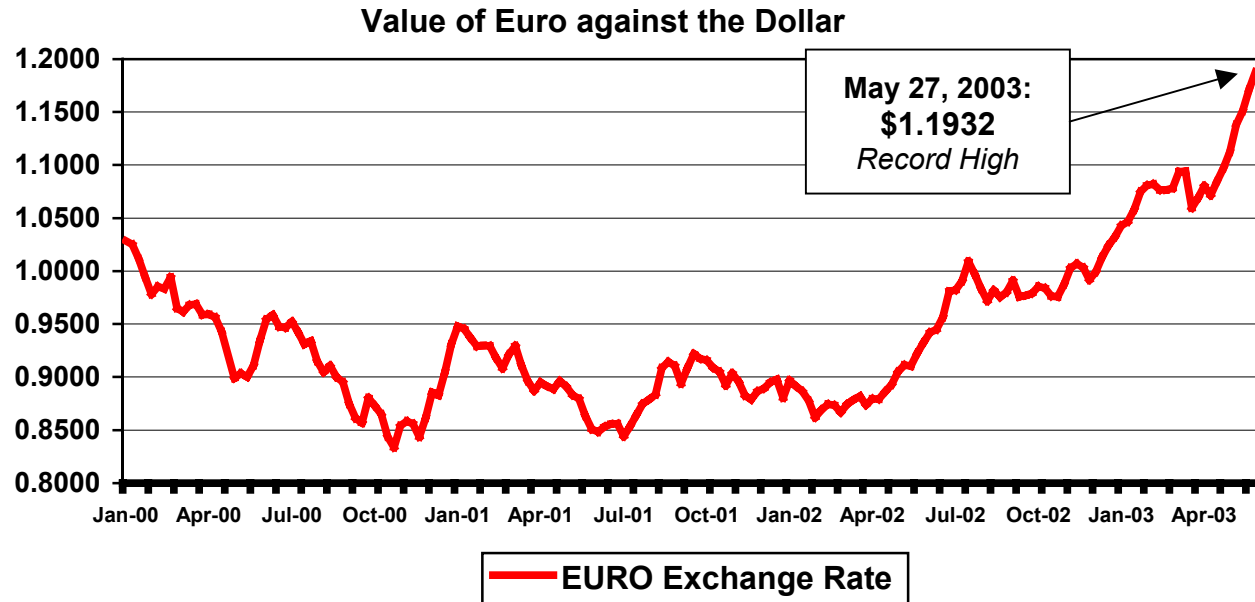
Domestic Visitors to Lee: Percent Change Over Previous Year



The Visitor Profile of Lee County: 2002 Year-End Summary

Full domestic market recovery (to pre 9/11 levels) is not likely to occur prior to the end of the first quarter of 2004. Note however, that normalization of the world's political scene will release significant pent-up demand, promoting the regeneration of 2003 visitation levels quickly.

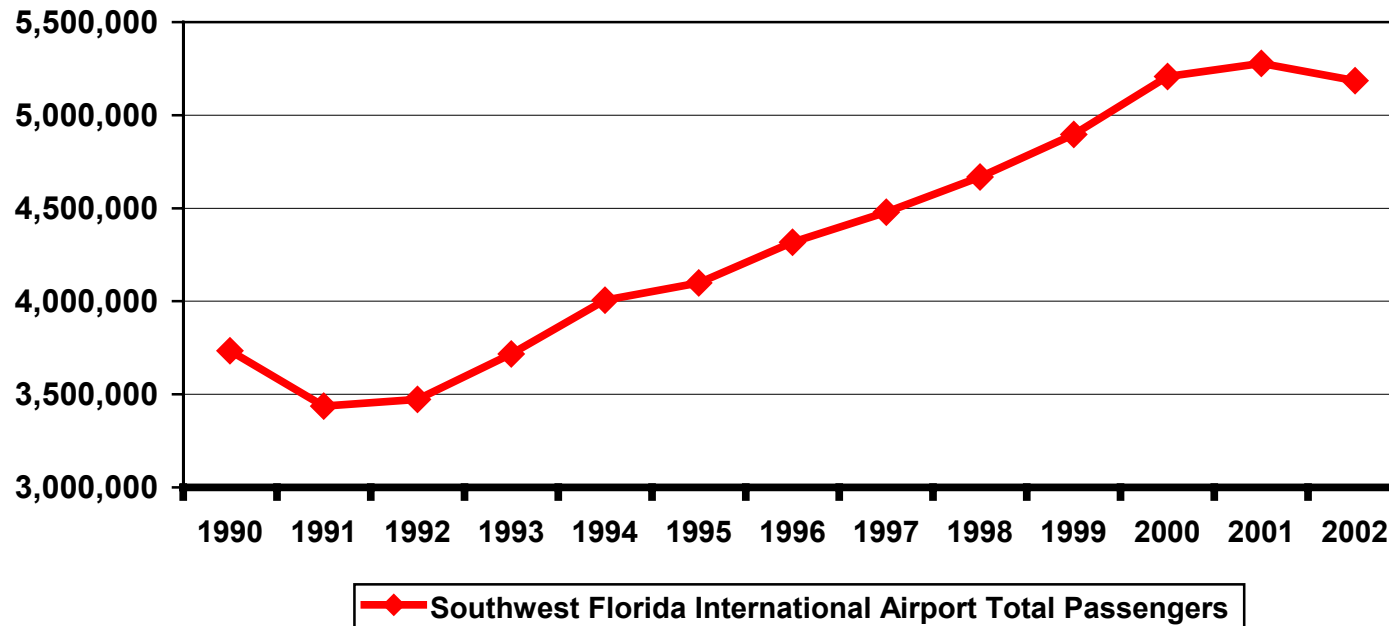
- Lee's European origin markets are a highly profitable visitor segment for the industry. These segments began contracting in the Spring of 2000, driven initially by exchange disparities (strong U.S. dollar) and later by the effects of worldwide terrorism and the threat of military conflict. European consumers concerns about long haul travel to the U.S. are moderating. Although full recovery of our pre 9/11 European visitation levels should not be expected prior to the Summer Season 2005, the strengthening Euro and the perception of Southwest Florida beach destinations as "very safe" could hasten the cycle.



The Visitor Profile of Lee County: 2002 Year-End Summary

5. Depending on the strength of the Canadian Dollar, this origin market will likely strengthen in tandem with U.S. domestic market trends.
6. In the wake of the current uncertainties, our "fly markets" have become more volatile. However, once consumer confidence and the political environment stabilize, we anticipate renewed demand and a relatively prompt (three to four month) return to pre-war air traffic levels.

Southwest Florida International Airport Passenger Traffic



The Visitor Profile of Lee County: 2002 Year-End Summary

7. In 2002, Lee County visitors' State Sales and Use Tax Collections are as follows:

	2002 Total Sales and Use Tax Collections	2002 Sales and Use Taxes Collected From Visitors (e)
Restaurants	\$39,155,862	\$20,370,201
Taverns and Bars	6,698,294	5,288,303
Hotel/Motel	27,004,887	23,534,760
Admissions	8,462,109	6,646,142
Motor Fuel and Gas Taxes	47,688,406 (i)	6,437,936 (i)
Gift Shops and Cards	4,532,162	1,455,277
Other Retail Sales	414,741,421	99,531,114
Total Tax	\$548,283,141	\$163,263,733

(i) *Interpolated based on gallonage from Fiscal 2000-01 Department of Revenue data.*

Highlighting the importance of tourism as an industry is the fact that visitors to the area save each Lee County resident an estimated \$344.00 in taxes each year.

8. In tandem with political and economic changes, the modes and channels of marketing tourism products have also radically changed. In 2002, the Internet continued its in-roads into travel marketing. Today, almost 90% of Lee's patrons have access to the Internet, and growing majorities [2001: 63.6%; 2002: 68.3%] routinely obtain on-line travel information. Note that just a year ago, only 32.8% of Lee visitors bought travel products on-line -- today, fully 43.7% make such purchases.

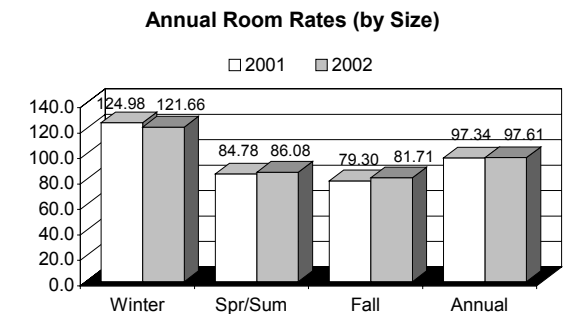
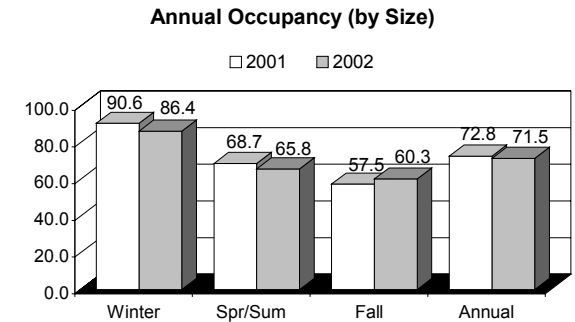
Lee County -- 2002 Annual Visitor Profile



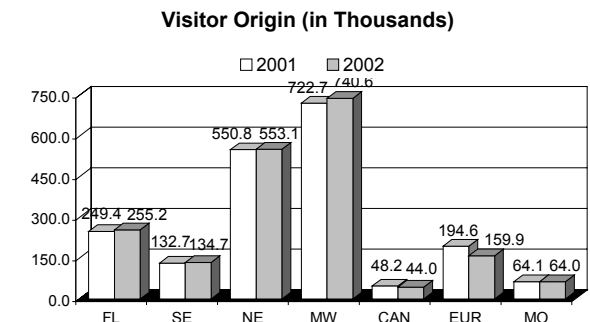
2002 Annual Visitor Profile -- Lee County

	Annual		% Δ 01/02
	2001	2002	
Number of Visitors	1,962,571	1,951,446	-0.6
Expenditures	\$1,080,609,347	\$1,079,802,838	-0.1
Room Nights	5,512,090	5,456,639	-1.0

Occupancy: Industry (Weighted)	Winter	Spr/Sum	Fall	Annual
Occupancy Rate 2002	86.4%	65.8%	60.3%	71.5%
Occupancy Rate 2001	90.6	68.7	57.5	72.8
Δ Points	-4.2	-2.9	+2.8	-1.3
Average Room Rate 2002	\$121.66	\$86.08	\$81.71	\$97.61
Average Room Rate 2001	124.98	84.78	79.30	97.34
Δ Percent	-2.7%	+1.5%	+3.0%	+0.3%



Visitor Origin	Percent Relative	Annual		01/02 Percent Change
		2001 Visitor Number	2002 Visitor Number	
Florida	12.7%	249,439	255,182	+2.3
Southeast	6.8	132,723	134,703	+1.5
Northeast	28.1	550,808	553,125	+0.4
Midwest	36.8	722,652	740,553	+2.5
Canada	2.4	48,221	44,015	-8.7
Europe	9.9	194,584	159,889	-17.8
Markets of Opportunity	3.3	64,144	63,979	-0.3
Total	100.0%	1,962,571	1,951,446	-0.6



LEE COUNTY 2002 ANNUAL AVERAGES

	1/02	2/02	3/02	4/02	Winter '02	5/02	6/02	7/02	8/02	S/S 2002
Number of Visitors	191,632	262,492	296,567	294,120	1,044,811	131,809	134,757	154,892	97,879	519,337
Room Nights	624,896	557,796	639,473	613,034	2,435,199	421,789	357,333	396,524	343,552	1,519,198
Expenditures	113,155,843	165,980,647	159,091,714	142,284,407	580,512,611	88,353,491	67,626,924	63,103,001	59,977,907	279,061,323
Occupancy Rate	77.0	93.3	94.7	80.5	86.4	70.8	63.1	67.4	61.8	65.8
Room Rate	109.87	140.90	133.50	102.38	121.66	84.38	87.59	83.94	88.40	86.08
Occupancy										
<20 Units	80.8	95.9	96.8	82.4	89.0	76.0	70.0	71.0	63.8	70.2
21-50 Units	75.7	93.0	94.9	76.4	85.0	68.4	65.5	72.1	59.9	66.5
51-100 Units	78.6	91.8	94.4	83.9	87.2	73.6	63.8	70.1	61.8	67.3
101+ Units	75.9	93.3	94.1	79.1	85.6	68.3	59.9	64.9	62.0	63.8
Average Room Rate										
<20 Units	100.50	113.12	104.90	85.95	101.12	78.16	69.16	70.88	76.79	73.75
21-50 Units	98.47	127.34	117.35	98.17	110.33	77.49	82.17	78.32	76.04	78.51
51-100 Units	136.50	165.47	168.57	130.78	150.33	101.12	103.23	104.45	100.55	102.34
101+ Units	116.60	162.02	143.17	131.97	138.44	101.66	99.43	102.56	104.56	102.05
Visitor Origin										
Florida	11,498	12,862	18,684	35,294	78,338	31,107	31,129	37,639	27,504	127,379
Southeast	13,989	13,125	17,497	16,765	61,376	7,513	14,015	16,264	7,928	45,720
Northeast	55,765	93,185	91,343	88,236	328,529	38,093	28,434	35,470	18,597	120,594
Midwest	84,510	119,171	128,710	116,177	448,568	40,465	43,661	44,919	27,308	156,353
Canada	5,941	7,612	9,194	7,059	29,806	1,977	809	1,084	783	4,653
Europe	12,839	10,237	22,539	21,177	66,792	9,754	11,993	14,405	12,431	48,583
Markets of Opportunity	7,090	6,300	8,600	9,412	31,402	2,900	4,716	5,111	3,328	16,055
TOTAL	191,632	262,492	296,567	294,120	1,044,811	131,809	134,757	154,892	97,879	519,337
Transportation Mode										
Plane	65.2	73.0	74.5	70.5	70.8	60.8	61.1	53.3	54.2	57.4
Rental Car	57.9	67.7	68.0	62.7	64.1	55.6	56.0	48.5	50.5	52.7
Personal Car	34.6	25.4	24.5	28.9	28.4	36.2	38.4	46.5	44.2	41.3
Airport Deplaned										
SW Florida Int'l	75.4	77.3	79.9	74.5	76.8	76.1	76.4	63.7	59.4	68.9
Orlando Int'l	6.4	7.7	3.6	6.5	6.1	8.8	9.1	11.1	19.6	12.2
Miami Int'l	7.6	3.8	5.4	7.6	6.1	6.9	6.3	8.9	9.8	8.0
Tampa Int'l	6.1	10.5	7.4	9.2	8.3	7.1	5.5	15.6	9.0	9.3
Car Rental Location										
Fort Myers	75.0	73.1	77.0	72.9	74.5	72.5	76.6	61.1	56.6	66.7
Orlando	7.1	7.8	3.7	6.5	6.3	7.6	10.7	11.9	21.2	12.9
Miami	6.4	2.2	6.3	7.6	5.6	7.3	6.0	9.5	9.9	8.2
Tampa	6.6	10.3	8.1	10.6	8.9	7.5	4.6	16.7	9.5	9.6

LEE COUNTY 2002 ANNUAL AVERAGES

	9/02	10/02	11/02	12/02	Fall 2002	Annual 2002
Number of Visitors	82,594	77,813	100,875	126,016	387,298	1,951,446
Room Nights	254,148	284,732	454,350	509,012	1,502,242	5,456,639
Expenditures	42,383,302	46,175,484	56,188,384	75,481,734	220,228,904	1,079,802,838
Occupancy Rate	50.8	59.9	70.2	60.2	60.3	71.5
Room Rate	79.31	79.07	69.09	99.38	81.71	97.61
Occupancy						
<20 Units	48.4	60.1	73.2	62.1	61.0	73.4
21-50 Units	50.9	57.6	70.4	62.0	60.2	70.6
51-100 Units	50.0	61.8	72.3	57.9	60.5	71.7
101+ Units	51.2	60.0	68.5	59.8	59.9	69.8
Average Room Rate						
<20 Units	64.43	69.13	66.85	83.18	70.90	81.92
21-50 Units	73.47	71.10	69.25	98.52	78.09	88.97
51-100 Units	90.08	89.33	93.25	115.53	97.05	116.57
101+ Units	91.22	84.56	90.58	101.79	92.04	110.84
Visitor Origin						
Florida	20,566	12,761	12,105	4,033	49,465	255,182
Southeast	5,782	5,136	6,860	9,829	27,607	134,703
Northeast	19,905	17,819	29,859	36,419	104,002	553,125
Midwest	21,805	23,655	33,087	57,085	135,632	740,553
Canada	743	1,401	3,127	4,285	9,556	44,015
Europe	9,994	12,839	11,096	10,585	44,514	159,889
Markets of Opportunity	3,799	4,202	4,741	3,780	16,522	63,979
TOTAL	82,594	77,813	100,875	126,016	387,298	1,951,446
Transportation Mode						
Plane	58.9	71.6	69.0	70.4	67.5	65.2
Rental Car	57.2	69.4	67.4	67.3	65.3	60.7
Personal Car	39.7	27.9	28.4	28.3	31.1	33.6
Airport Deplaned						
SW Florida Int'l	65.3	67.1	72.8	75.8	70.3	72.0
Orlando Int'l	12.5	7.5	5.2	4.0	7.3	8.5
Miami Int'l	11.7	14.8	8.2	7.5	10.6	8.2
Tampa Int'l	9.1	7.4	11.3	11.1	9.7	9.1
Car Rental Location						
Fort Myers	62.6	66.2	71.0	74.8	68.7	70.0
Orlando	12.9	8.4	5.6	4.2	7.8	9.0
Miami	12.1	14.7	8.1	7.9	10.7	8.2
Tampa	10.5	8.2	12.3	11.6	10.7	9.7

LEE COUNTY 2002 ANNUAL AVERAGES

	1/02	2/02	3/02	4/02	Winter '02	5/02	6/02	7/02	8/02	S/S 2002
Purpose of Trip										
Vacation	98.0	98.7	99.0	97.5	98.3	98.9	97.7	97.9	97.8	98.1
Conf/Conv/BusMtg	14.0	12.6	16.8	19.4	15.7	21.7	22.5	21.4	20.0	21.4
Visit Friends & Relatives	11.3	15.0	13.6	12.9	13.2	n/a	10.1	11.7	12.9	11.6
First Visit										
Lee County	32.4	31.9	36.4	35.8	34.1	37.3	34.9	32.7	35.0	35.0
Florida	2.9	3.0	3.9	4.4	3.6	4.8	4.7	1.3	5.1	4.0
First Time Visitors										
Florida	30.2	30.0	n/a	24.2	28.1	24.2	29.1	35.6	25.9	28.7
Southeast	44.4	36.1	43.9	38.5	40.7	36.4	43.9	34.4	45.8	40.1
Northeast	35.5	26.8	37.0	38.9	34.6	47.2	39.0	27.9	34.4	37.1
Midwest	22.7	25.2	24.7	30.0	25.7	40.3	26.3	32.2	30.1	32.2
Europe	58.4	50.0	56.3	44.4	52.3	36.8	56.1	28.6	42.1	40.9
Markets of Opportunity	62.5	41.7	47.8	n/a	50.7	n/a	47.6	50.0	41.7	46.4
Avg Repeat Visits	3.4	3.2	3.4	3.2	3.3	4.0	3.2	3.4	3.3	3.5
Information Sources										
Internet	n/a	n/a	n/a	n/a	n/a	46.1	64.1	46.3	50.8	51.8
Previous Visit	66.9	67.5	62.0	64.8	65.3	62.5	62.6	64.3	63.3	63.2
Recommendations	37.8	35.9	34.3	42.7	37.7	39.6	38.7	41.0	41.1	40.1
Business Contacts	4.5	n/a	0.7	1.7	2.3	2.9	3.0	1.9	0.8	2.2
Print Media	11.7	11.7	13.9	16.1	13.4	14.6	12.0	14.3	14.6	13.9
Travel Agent	4.0	2.8	5.5	3.6	4.0	n/a	n/a	n/a	n/a	n/a
Travel Agent Assisted	22.4	22.0	23.4	24.0	23.0	18.8	12.7	13.7	17.0	15.6
Travel Agent Assisted with:										
Airline Reservations	80.3	84.6	85.3	85.3	83.9	82.8	74.0	85.7	88.2	82.7
Hotel/Motel Reservations	44.0	51.5	49.7	53.0	49.6	43.7	45.2	54.7	53.2	49.2
Vacation Packages	6.9	5.3	5.6	9.4	6.8	4.8	13.6	15.8	5.9	10.0
Reservations										
Before	88.0	85.7	87.4	87.4	87.1	92.2	83.0	88.4	88.9	88.1
None	9.0	10.9	9.6	10.2	9.9	7.5	14.5	9.2	9.7	10.2
Length of Stay (OOS)										
Away from Home	12.0	12.0	10.6	9.9	11.1	9.1	10.0	10.8	10.6	10.1
In Florida	11.3	11.0	9.9	9.3	10.4	8.4	9.1	9.8	10.2	9.4
In Lee County	8.2	8.2	7.4	6.7	7.6	5.8	5.9	6.4	5.9	6.0

LEE COUNTY 2002 ANNUAL AVERAGES

	9/02	10/02	11/02	12/02	Fall 2002	Annual 2002
Purpose of Trip						
Vacation	98.6	97.1	98.2	98.5	98.1	98.2
Conf/Conv/BusMtg	19.5	21.4	17.0	17.7	18.9	18.7
Visit Friends & Relatives	13.9	16.0	17.6	16.6	16.0	13.8
First Visit						
Lee County	38.4	35.6	32.8	29.6	34.1	34.4
Florida	4.5	5.2	3.8	3.2	4.2	3.9
First Time Visitors						
Florida	32.0	29.6	34.2	36.4	33.1	30.1
Southeast	41.0	40.7	32.3	36.0	37.5	39.5
Northeast	34.3	34.2	30.6	25.8	31.2	34.3
Midwest	39.2	24.1	18.4	25.5	26.8	28.2
Europe	46.7	40.7	41.2	22.2	37.7	43.6
Markets of Opportunity	63.6	n/a	n/a	40.0	n/a	49.4
Avg Repeat Visits	3.3	3.9	3.7	3.9	3.7	3.5
Information Sources						
Internet	52.8	48.8	47.9	64.4	53.5	52.7
Previous Visit	59.7	63.3	62.6	68.6	63.6	64.0
Recommendations	47.5	39.5	39.8	35.1	40.5	39.4
Business Contacts	3.3	1.2	2.5	n/a	2.3	2.3
Print Media	15.9	17.9	20.2	17.8	18.0	15.1
Travel Agent	3.1	n/a	2.3	n/a	n/a	n/a
Travel Agent Assisted	15.1	13.2	15.0	16.9	15.1	17.9
Travel Agent Assisted with:						
Airline Reservations	73.0	78.9	82.6	83.3	79.5	82.0
Hotel/Motel Reservations	59.5	48.8	55.3	38.9	50.6	49.8
Vacation Packages	19.4	4.0	4.4	5.6	8.4	8.4
Reservations						
Before	85.0	87.4	89.1	87.9	87.4	87.5
None	14.5	11.7	7.0	10.0	10.8	10.3
Length of Stay (OOS)						
Away from Home	10.3	10.7	10.2	11.1	10.6	10.6
In Florida	9.5	9.7	9.7	10.1	9.8	9.8
In Lee County	5.8	6.0	6.6	7.6	6.5	6.7

LEE COUNTY 2002 ANNUAL AVERAGES

	1/02	2/02	3/02	4/02	Winter '02	5/02	6/02	7/02	8/02	S/S 2002
Length of Stay (FL)										
Away from Home	3.5	3.5	3.6	3.8	3.6	3.8	3.6	4.6	4.5	4.1
In Lee County	3.3	3.1	3.4	3.6	3.4	3.6	3.5	4.6	4.4	4.0
% Staying 4 days or less										
Out-of-State	21.5	24.1	20.3	20.1	21.5	27.2	23.0	26.6	30.3	26.8
Floridian	80.0	82.1	73.7	84.8	80.2	89.0	69.5	61.4	65.5	71.4
Party Size										
Out-of-State	2.5	2.3	2.8	2.7	2.6	2.5	2.8	3.1	3.1	2.9
Floridian	2.1	2.0	2.1	2.9	2.3	2.7	3.0	3.1	3.3	3.0
Party Composition										
Couple	73.3	73.3	59.0	58.2	66.0	73.7	57.6	54.0	50.3	58.9
Family	24.8	23.4	39.6	40.0	32.0	23.7	40.6	43.7	48.5	39.1
Single	1.7	2.8	1.3	1.8	1.9	1.9	1.7	1.7	1.3	1.7
Where Stayed Night Before Lee										
At Home	67.8	67.4	72.9	76.8	71.2	73.0	69.3	65.1	64.3	67.9
In FL, Not in Lee	28.7	31.6	23.8	22.5	26.7	24.0	26.3	33.0	32.9	29.1
On the Road, Not in FL	3.5	1.0	3.3	0.7	2.1	3.0	4.4	1.9	2.8	3.0
Where Stayed in Florida										
Orlando/Disney	22.2	22.1	20.8	21.9	21.8	22.2	39.0	31.1	35.3	31.9
Tampa Bay	12.4	13.2	12.5	10.9	12.3	11.0	8.7	13.5	8.8	10.5
Ft. Laud./Palm Bch.	6.3	4.7	8.3	7.7	6.8	6.7	5.6	5.4	7.4	6.3
Florida Keys	9.7	8.1	9.7	11.4	9.7	8.9	10.2	12.1	8.5	9.9
Sarasota	13.1	8.0	7.8	9.2	9.5	13.5	4.4	9.5	13.3	10.2
Miami	4.0	2.9	5.1	7.8	5.0	4.4	6.5	6.7	4.4	5.5
Naples/Marco Island	5.6	4.2	9.1	9.4	7.1	6.3	2.2	6.8	6.7	5.5
Attractions Visited										
Disney	5.0	4.3	4.3	5.7	4.8	5.4	n/a	9.2	7.6	7.4
Edison/Ford Home	7.0	8.0	9.5	7.1	7.9	13.2	10.8	11.7	7.3	10.8
EPCOT	6.2	6.6	3.6	4.9	5.3	6.9	7.2	9.1	n/a	7.7
Sea World	6.4	5.0	4.4	5.7	5.4	6.1	7.8	8.3	7.4	7.4
Universal Studios	5.4	6.3	4.7	4.2	5.2	n/a	7.5	8.4	9.3	8.4
Kennedy Space Center	5.8	7.7	5.6	6.0	6.3	n/a	n/a	n/a	6.7	n/a
Ding Darling	1.8	5.4	4.6	2.5	3.6	2.5	1.4	n/a	n/a	2.0
Satisfaction with Lee	99.3	99.7	98.0	99.3	99.1	99.6	99.7	99.7	99.0	99.5

LEE COUNTY 2002 ANNUAL AVERAGES

	9/02	10/02	11/02	12/02	Fall 2002	Annual 2002
Length of Stay (FL)						
Away from Home	3.6	3.7	3.6	4.0	3.7	3.8
In Lee County	3.5	3.5	3.6	3.8	3.6	3.7
% Staying 4 days or less						
Out-of-State	37.2	26.7	30.1	17.8	28.0	25.4
Floridian	73.4	85.7	89.1	65.0	78.3	76.6
Party Size						
Out-of-State	2.5	2.5	2.5	2.8	2.6	2.7
Floridian	2.8	2.4	2.5	2.4	2.5	2.6
Party Composition						
Couple	75.7	76.6	73.8	64.8	72.7	65.9
Family	22.7	20.7	24.6	33.8	25.5	32.2
Single	1.7	1.9	1.3	1.4	1.6	1.7
Where Stayed Night Before Lee						
At Home	63.2	70.2	73.1	73.9	70.1	69.8
In FL, Not in Lee	34.2	25.0	22.9	23.5	26.4	27.4
On the Road, Not in FL	2.6	4.8	4.0	2.6	3.5	2.9
Where Stayed in Florida						
Orlando/Disney	35.2	30.5	30.0	20.8	29.1	27.6
Tampa Bay	13.5	11.6	16.7	11.1	13.2	12.0
Ft. Laud./Palm Bch.	4.0	8.1	6.7	11.8	7.7	6.9
Florida Keys	9.2	8.9	8.3	9.7	9.0	9.6
Sarasota	7.5	8.2	11.7	n/a	9.1	9.7
Miami	5.7	10.7	5.0	5.6	6.8	5.7
Naples/Marco Island	6.9	n/a	n/a	6.9	n/a	6.4
Attractions Visited						
Disney	7.7	n/a	2.5	1.9	4.0	5.4
Edison/Ford Home	12.0	8.3	6.7	10.5	9.4	9.3
EPCOT	8.7	6.4	2.8	3.8	5.4	6.0
Sea World	9.3	6.2	3.2	4.7	5.9	6.2
Universal Studios	7.0	6.9	4.1	5.7	5.9	6.3
Kennedy Space Center	7.2	5.7	4.4	5.1	5.6	6.0
Ding Darling	n/a	2.6	2.4	2.4	2.5	2.8
Satisfaction with Lee	99.0	99.9	99.2	99.1	99.3	99.3

LEE COUNTY 2002 ANNUAL AVERAGES

	1/02	2/02	3/02	4/02	Winter '02	5/02	6/02	7/02	8/02	S/S 2002
Lee Features Liked Most										
Beaches	80.9	77.0	82.5	79.2	79.9	80.2	80.6	89.0	82.2	83.0
Climate	74.9	80.3	86.8	80.0	80.5	59.4	40.1	37.9	32.0	42.4
Rest/Relaxation/Quiet	63.0	68.3	59.4	56.8	61.9	62.3	57.9	66.6	69.8	64.2
Clean Environment	24.1	26.9	16.5	20.6	22.0	19.3	20.1	13.3	28.7	20.4
Friendly Residents	11.9	13.4	11.9	10.9	12.0	n/a	n/a	15.8	14.8	15.3
Safety	n/a	n/a	0.7	1.4	1.1	n/a	1.7	3.4	6.0	3.7
Tropical Atmosphere	n/a	n/a	46.2	39.8	43.0	n/a	n/a	47.7	38.7	43.2
Lee Features Liked Least										
No Specific Complaints	72.3	68.9	60.6	66.9	67.2	82.5	75.6	76.1	78.6	78.2
Congestion	14.0	24.6	28.1	20.1	21.7	3.2	4.3	2.2	0.2	2.5
Weather	3.2	0.6	n/a	n/a	1.9	n/a	3.3	6.8	2.5	4.2
Insects	n/a	n/a	1.3	1.1	1.2	4.5	5.0	9.8	5.4	6.2
Expense	n/a	n/a	4.1	2.5	3.3	2.3	n/a	3.2	1.8	2.4
Expense vs. Expectations										
More Expensive	2.7	3.5	6.0	2.5	3.7	2.9	0.3	2.7	3.7	2.4
Less Expensive	1.4	0.2	0.7	1.8	1.0	2.0	0.9	1.3	1.4	1.4
As Expected	95.4	92.3	92.0	93.7	93.4	91.2	94.6	89.9	88.3	91.0
Recommend Lee										
	92.5	98.3	92.9	93.3	94.3	92.4	93.3	91.0	94.0	92.7
Plan to Return (%yes)										
To Local Area	86.1	89.4	91.5	87.7	88.7	90.5	91.6	86.2	86.5	88.7
Next year	64.8	64.4	66.0	64.7	65.0	61.6	58.7	57.2	52.7	57.6
Median Age of Head of HH										
	50.7	52.2	49.4	49.2	50.4	48.0	46.0	46.5	47.2	46.9
Median Annual HH Income										
	80,650	79,472	80,727	80,053	80,226	79,430	76,331	76,322	76,552	77,159
Average Number of:										
Getaway	2.7	2.9	3.1	2.8	2.9	2.7	2.8	2.8	2.6	2.7
Vacations	1.8	2.0	2.0	1.8	1.9	1.6	1.7	1.4	1.6	1.6
Out-of-State Visitor										
Party Budget										
Total	1,638.95	1,938.63	1,776.64	1,443.85	1,699.52	1,109.72	1,135.82	1,262.95	1,288.89	1,199.35
Per person/trip	655.58	842.88	634.51	534.76	666.93	443.89	405.65	407.40	415.77	418.18
Per person/day	79.95	102.79	85.75	79.81	87.08	76.53	68.75	63.66	70.47	69.85

LEE COUNTY 2002 ANNUAL AVERAGES

	9/02	10/02	11/02	12/02	Fall 2002	Annual 2002
Lee Features Liked Most						
Beaches	77.6	81.6	87.7	77.0	81.0	81.3
Climate	31.7	51.3	69.3	67.9	55.1	59.3
Rest/Relaxation/Quiet	78.7	47.6	75.4	76.6	69.6	65.2
Clean Environment	23.7	8.7	28.1	26.9	21.9	21.4
Friendly Residents	22.7	14.5	11.9	17.3	16.6	14.5
Safety	3.0	5.2	2.0	n/a	3.4	2.9
Tropical Atmosphere	34.0	41.7	34.3	51.1	40.3	41.7
Lee Features Liked Least						
No Specific Complaints	79.6	81.4	80.9	70.9	78.2	74.5
Congestion	1.5	n/a	5.7	13.5	6.9	10.7
Weather	3.5	1.1	1.0	6.5	3.0	3.2
Insects	5.6	8.4	7.0	4.6	6.4	5.3
Expense	n/a	1.4	n/a	n/a	1.4	2.6
Expense vs. Expectations						
More Expensive	0.7	1.2	1.0	0.9	1.0	2.3
Less Expensive	2.4	2.1	1.6	1.6	1.9	1.5
As Expected	93.3	93.9	93.9	91.5	93.2	92.5
Recommend Lee						
	99.2	94.0	93.2	94.6	95.3	94.1
Plan to Return (%yes)						
To Local Area	86.8	89.5	92.7	84.5	88.4	88.6
Next year	60.4	57.8	63.8	63.6	61.4	61.3
Median Age of Head of HH						
	48.0	49.2	51.0	50.5	49.7	49.0
Median Annual HH Income						
	76,352	75,805	78,068	84,660	78,721	78,702
Average Number of:						
Getaway	2.6	2.8	2.8	2.7	2.7	2.8
Vacations	1.6	1.7	1.8	1.8	1.7	1.7
Out-of-State Visitor						
Party Budget						
Total	1,065.58	1,173.23	1,276.73	1,355.46	1,217.75	1,372.20
Per person/trip	426.23	469.29	510.69	484.09	472.58	519.23
Per person/day	73.49	78.22	77.38	63.70	73.20	76.71

LEE COUNTY 2002 ANNUAL AVERAGES

	1/02	2/02	3/02	4/02	Winter '02	5/02	6/02	7/02	8/02	S/S 2002
Out-of-State Visitor										
Party Budget Breakout										
Accommodations	948.78	1,065.20	1,074.55	854.75	985.82	769.02	604.58	669.91	714.71	689.56
Food/Entertainment	559.31	593.89	622.08	605.12	595.10	406.57	408.66	444.31	477.32	434.22
Rental Car	240.62	253.52	269.02	285.64	262.20	238.65	208.47	230.23	227.73	226.27
Retail Purchase	152.60	184.79	160.18	156.06	163.41	136.92	128.79	142.27	153.36	140.34
See/Read/Hear Message	30.4	32.2	32.9	33.0	32.1	42.7	39.1	45.7	41.9	42.4
Type of Message Seen										
Internet	n/a	n/a	n/a	n/a	n/a	67.2	76.9	65.9	76.3	71.6
Travel/Visitor Guides	42.7	45.6	44.1	45.5	44.5	40.6	43.9	45.3	47.1	44.2
Newspaper	18.2	17.8	27.2	19.4	20.7	27.1	29.2	23.7	17.9	24.5
Magazine	11.7	17.6	20.6	12.9	15.7	15.6	16.4	17.7	20.1	17.5
Television	6.9	4.4	8.7	7.5	6.9	13.7	11.3	11.7	6.9	10.9
Influence by Lee Message	76.5	75.0	73.9	75.3	75.2	73.4	75.4	77.8	80.4	76.8
Occupation										
Professional/Tech	40.8	36.5	42.7	43.0	40.8	43.5	47.2	50.7	46.2	46.9
Executive/Managerial	16.0	15.7	12.5	15.8	15.0	20.9	18.8	13.7	18.5	18.0
Retired	20.9	25.8	17.5	15.1	19.8	13.0	13.9	8.8	11.4	11.8
Craft/Factory	3.7	3.6	5.1	5.6	4.5	7.7	7.0	5.3	5.7	6.4
Sales/Buyer	12.1	9.6	9.9	11.4	10.8	9.7	9.3	12.7	10.7	10.6
Use a Computer	91.0	92.1	89.3	88.7	90.3	91.2	93.0	94.0	94.6	93.2
Have Internet Access	94.7	96.5	95.8	94.4	95.4	96.4	96.8	96.6	96.1	96.5
Obtain Travel Info.	78.4	79.8	74.4	78.5	77.8	72.0	71.4	74.0	75.9	73.3
Book Travel Res. Online	43.1	46.2	49.6	42.5	45.4	42.8	46.8	46.8	49.3	46.4
Book Lodging	n/a	n/a	47.2	55.6	51.4	60.9	58.2	42.9	52.6	53.7

LEE COUNTY 2002 ANNUAL AVERAGES

	9/02	10/02	11/02	12/02	Fall 2002	Annual 2002
Out-of-State Visitor						
Party Budget Breakout						
Accommodations	644.47	573.72	727.27	698.80	661.07	778.81
Food/Entertainment	408.71	422.91	449.03	472.01	438.17	489.16
Rental Car	160.78	202.09	194.70	253.48	202.76	230.41
Retail Purchase	182.61	143.65	145.78	164.89	159.23	154.33
See/Read/Hear Message	42.8	36.4	36.8	36.9	38.2	37.6
Type of Message Seen						
Internet	77.4	71.6	62.9	75.3	71.8	71.7
Travel/Visitor Guides	44.9	46.3	40.4	51.6	45.8	44.8
Newspaper	23.5	23.4	16.8	26.9	22.7	22.6
Magazine	12.2	18.5	17.0	24.8	18.1	17.1
Television	5.8	7.3	10.0	5.1	7.1	8.3
Influence by Lee Message	80.1	76.6	76.2	79.5	78.1	76.7
Occupation						
Professional/Tech	34.0	42.8	38.1	45.1	40.0	42.6
Executive/Managerial	22.7	14.5	18.7	18.2	18.5	17.2
Retired	15.7	17.8	19.3	14.6	16.9	16.2
Craft/Factory	9.8	4.3	8.9	5.0	7.0	6.0
Sales/Buyer	10.0	12.0	10.2	10.7	10.7	10.7
Use a Computer	92.3	90.4	92.1	92.2	91.8	91.7
Have Internet Access	97.5	97.5	96.0	98.7	97.4	96.4
Obtain Travel Info.	82.2	80.1	77.4	82.9	80.7	77.3
Book Travel Res. Online	62.1	53.6	52.5	57.9	56.5	49.4
Book Lodging	53.9	47.4	46.7	46.2	48.6	51.2