*Sanibel & Captiva Islands, Fort Myers Beach, Fort Myers, Bonita Springs, Estero, Cape Coral, Pine Island, Boca Grande & Outer Islands, North Fort Myers, Lehigh Acres*

# 2008 Annual Visitor Profile and Occupancy Analysis
# January – December 2008

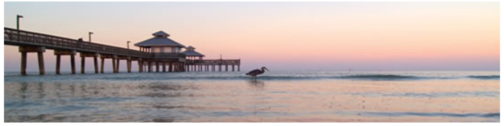
March 17, 2009

**Prepared for:**

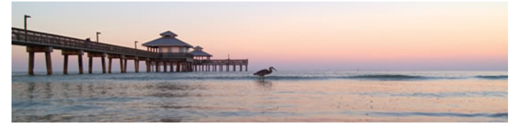
Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

**Prepared by:**



# Executive Summary
# 2008



The following pages summarize the ongoing Visitor Profile and Occupancy research conducted in Lee County. This research includes monthly surveys of:

- Visitors in Lee County (200 per month),
- Lodging Property Managers (~ 150 per month), and
- Residents of Lee County (100 per month).

This report covers the period of January 2008 through December 2008 and includes results for each of four seasons:

- Winter (January-March 2008),
- Spring (April-June 2008),
- Summer (July-September 2008), and
- Fall (October-December 2008).

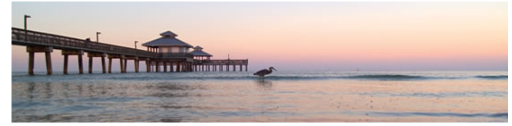
## Visitor Estimates

During the 12-month period from January through December 2008, Lee County hosted an estimated 4.7 million visitors. More than half of these visitors stayed with friends or relatives while visiting (2.6 million), and 2.1 million stayed in paid accommodations.

Three-fourths of Lee County visitors staying in paid accommodations are domestic visitors. More than 1.5 million domestic visitors stayed in paid accommodations from January-December 2008.

Lee County's top international markets in 2008 include Germany (170,691 visitors) the United Kingdom (129,026), and Canada (116,930). While visitors from the UK and Germany were more likely to visit during the summer and fall months, Canadian visitors mirrored the Northeast US visitor pattern, with most arriving during the winter months.

Among US residents staying in paid accommodations, two in five arrived from the Midwest (more than 595,000). One-fourth came from the South (23%), while one-fifth came from the Northeast (18%). Escaping from the cold weather, visitors from the Midwest and Northeast were most likely to visit during the winter months. Southern visitors were more likely to opt for the lower tourist traffic months of the spring and summer.



One in ten Lee County visitors were Floridians, with more than 140,000 visitors during 2008. As with visitors from the Southern US, the bulk of these guests came during the warmer months of spring and summer.

## Visitor Expenditures

In total, visitors spent an estimated $2.9 billion in Lee County in 2008. More than half of this was spent by visitors staying in paid accommodations ($1.7 billion), and the remainder was spent by visitors staying with friends or relatives ($1.2 billion).

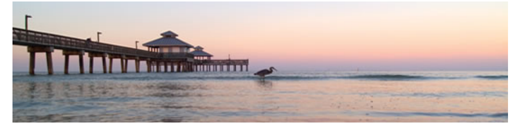
Visitor expenditures were highest during the winter 2008 season (January-March). One-third of the annual visitor expenditures were brought into the County during this three-month period which represents only one quarter of the days in the year.

The average Lee County visitor spent $124.17 per day while visiting the County, with the highest average per person per day expenditures occurring during the winter months of January-March 2008 and the lowest occurring during July-September.

## Trip Planning

Two-thirds of visitors made the decision to come to Lee County at least three months before they arrived (62%). The travel planning window is affected by whether or not visitors have been to Lee County before and by the type of accommodations they stay in while visiting. First-time visitors are more likely to plan their trip less than two months in advance, while repeat visitors are more likely to plan farther out (a year or more). Vacationers who stayed in a condo/vacation home or an RV park/campground are more likely to have planned their trip at least six months in advance.

While planning their trip to Lee County, one traveler in six visited the VCB's website. Visitors staying in hotels/motels/resorts and condos/vacation homes are most likely to have searched for information at www.fortmyers-sanibel.com. Overall, airline websites and online search engines are the most frequently visited websites when planning a trip to Lee County.



When deciding to visit Lee County, the factors that were reported to be most influential in the decision-making process include:

- Warm weather (87%),
- Peaceful/relaxing (85%), and
- White sandy beaches (81%).

Midwesterners are more likely than visitors from other regions of the US to be influenced by the *warm weather* and *white sandy beaches*.

**Visitor Profile**

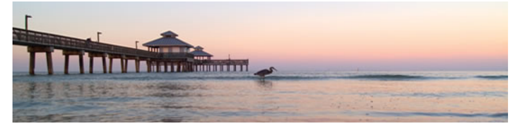
Overall, 71% of Lee County's 2008 visitors were repeat visitors.  First-time visitors were more prevalent during the July-September 2008 season, when one-third were first-time visitors (35%).

Two-thirds of Lee County visitors arrived by airplane (67%).  Though low on average, the proportion of visitors driving a recreational vehicle into the County is highest during the January-March season (4% compared to 2% overall).  The proportion driving a rental vehicle into Lee County is highest during the summer season (July-September).

One-fourth of Lee County visitors said they recall seeing or reading advertising or promotions for the Lee County area (23%).  Recall was highest among in-state visitors (39% versus 23% out-of-state).  Not surprisingly, repeat visitors also showed higher recall of Lee County advertising (25% versus 20% among first-time visitors).

One-third of Lee County visitors were traveling with children (30%), more so during those seasons that include months when children are out of school - April-June (42%) and July-September (39%).  Travelers staying in condos or vacation homes were more likely to bring children (37%), as were in-state visitors (43%).

Overall, visitors were not surprised by the prices they encountered while visiting Lee County.  Three-fourths found the area to be as expensive as they had expected (75%).



Nine visitors in ten were satisfied with their visit to Lee County (94%), especially repeat visitors. Nine in ten would recommend the area to a friend over other vacation areas in Florida (89%), and the same proportion plan to come back to Lee County for another vacation. Though still high, visitor satisfaction appears to be lowest during the summer season, when 56% of visitors report being *very satisfied* with their visit (versus 63% overall) and 85% are likely to return to Lee County (versus 89% overall).

Visitors' least liked features of Lee County include traffic, insects, and beach seaweed. Out-of-state visitors, particularly those from the Midwest and Northeast, are most likely to mention traffic as one of the things they like least about the area. This opinion is most prevalent in the winter when the area is more crowded. Not surprisingly, insects and beach seaweed are more likely to be mentioned by summer visitors.

## Lodging Property Managers' Assessments

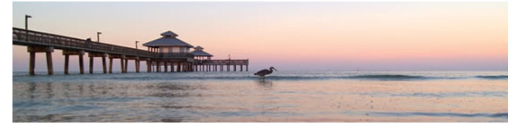
The average occupancy rate for 2008 was 51.6%, peaking during the January-March 2008 time period at 73.6% and reaching its lowest during the summer months of July-September 2008 (36.6%). Occupancy doubled from summer to winter.

Similarly, daily rates averaged $136.50 for the year, with the highest rates occurring during the winter season ($171.85) and the lowest during the fall ($109.55). Rates increased 57% between fall and winter.

As compared to inland properties, coastal properties showed higher occupancy rates and higher average daily rates across the board.

For 2008, one-fourth of property managers reported that their current month's occupancy was *better* than the same month last year (25%). Half reported that it was *worse*. Managers were more likely to report *better* occupancy:

- During the first quarter of the year reported – January-March 2008 (33%);
- If they managed a condo or vacation home (36%); and
- If their property was located on the coast (36%).



Conversely, managers were more likely to report *worse* occupancy:

- During the third and fourth quarters of the year – July-September 2008 (61%) and October-December 2008 (55%);
- If they managed a hotel/motel/resort property (61%); and
- If their property was located inland (64%).

Revenue comparisons exhibited the same pattern. One-fourth reported *better* revenue than during the same month in the prior year (26%), and 51% reported *worse* revenue. Differences by type of property, location, and season were similar to the occupancy comparisons.

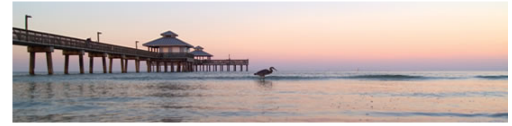
When asked to compare their next three month's reservations with the same time period last year, lodging property managers expressed decreasing optimism as the year progressed, concurrent with the ongoing and deepening recession throughout the country. While overall 18% reported that reservations for the next three months were *better* than last year, 27% responded this way in January-March 2008 as compared to only 12% in October-December 2008. Conversely, nearly half (46%) reported that reservations were *down* as compared to last year – with 39% responding in this manner during January-March and 54% in October-December.

**<u>Conclusions</u>**

In 2008 nearly five million people visited Lee County and spent three billion dollars in the County. Over the seasons of the year, the winter season is the strongest, with drops in visitation and dollars during the spring and further declines in the summer. The fall visitation and expenditures, however, increased in the face of the deepening recession – probably due to the holiday season for visiting friends and family.

Accommodations managers became more and more pessimistic through the year as the visitation and expenditures declined due to the deepening recession.

In looking forward to the next three months, property managers in the winter anticipated growth in the Canadian visitation likely due to the strength of the Canadian dollar against the US dollar. By spring, however, the change in value had begun and managers saw future visitation the same in the spring and summer while seeing fewer Canadian visitors coming when asked in the fall. Managers began to see declines in future European visits in the summer and the fall.



The visitor profiles for the four seasons are quite different:

- Winter, the high season, is an adult vacation in Lee County. Half the visitors come as older couples and report smaller travel parties with few having children with them. In the midst of winter they come primarily for the warm weather and stay in hotels or motels. Traffic is their most widespread problem.

- In the spring, visitors are mostly from the US, especially the Midwest. Nearly half have children with them and one-third are visiting friends and relatives, perhaps for Easter or spring break.

- Summer also brings younger visitors, with families and children, often staying in condos. First time visitors are more likely to visit in the summer and fewer summer visitors say they will return. They complain about insects and seaweed.

- In the fall, most are repeat visitors – even fall international visitors. A large group are visiting and staying with friends and relatives.

Such differences may suggest different advertising approaches for different periods during the year:

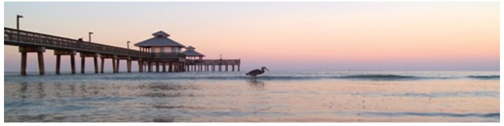
- For winter planners, showing older couples on the golf course or the beach might be intriguing.

- Spring and summer themes might well include children playing on the beach – maybe even with grandpa and grandma already tanned.

- Spring and fall are strong seasons for European travelers, suggesting a heavier weight campaign for those periods internationally.

- Fall might include holiday festivities with grandparents – perhaps at a special restaurant in Lee County.

First time visitors remain key to broaden the base of visitors. Most seem to try a trip to the county in the summer. Perhaps special promotions could be done for first timers by the restaurants or attractions during the summer season.



# January – December 2008 Lee County Snapshot

| Total Visitation | | | | | | |
|---|---|---|---|---|---|---|
| | | **Annual** | **Winter (a) Jan-Mar08** | **Spring (b) Apr-Jun08** | **Summer (c) Jul-Sept08** | **Fall (d) Oct-Dec08** |
| Paid Accommodations | 43% | 2,065,760 | 529,663 | 613,596 | 453,905 | 468,596 |
| Friends/Relatives | 57% | 2,688,078 | 764,581 | 690,806 | 594,633 | 638,058 |
| *Total Visitation* | | *4,753,838* | *1,294,244* | *1,304,402* | *1,048,538* | *1,106,654* |

| Visitor Origin - Visitors Staying in Paid Accommodations | | | | | | |
|---|---|---|---|---|---|---|
| | | **Annual** | **Winter (a) Jan-Mar08** | **Spring (b) Apr-Jun08** | **Summer (c) Jul-Sept08** | **Fall (d) Oct-Dec08** |
| Florida | 9% | 142,466 | 6,102 | 46,951 | 64,165 | 23,293 |
| | | | | | | |
| United States | 73% | 1,514,711 | 432,029 | 513,219 | 283,988 | 297,326 |
| Germany | 8% | 170,691 | 9,763 | 35,618 | 67,729 | 54,807 |
| UK | 6% | 129,026 | 14,645 | 21,047 | 47,529 | 43,845 |
| Canada | 6% | 116,930 | 51,258 | 22,666 | 13,071 | 27,403 |
| Scandinavia | 2% | 44,353 | 6,102 | 1,619 | 10,694 | 16,442 |
| Ireland | 1% | 28,224 | 3,661 | -- | 8,318 | 9,591 |
| BeNeLux | 1% | 26,880 | 2,441 | 3,238 | 14,259 | 5,481 |
| France | 1% | 14,784 | 1,220 | 4,857 | 4,753 | 2,740 |
| Switzerland | 1% | 14,784 | -- | 4,857 | 1,188 | 2,740 |
| Austria | <1% | 8,064 | 2,441 | -- | 1,188 | 2,740 |
| Other Europe | <1% | 9,408 | 1,220 | 3,238 | -- | 1,370 |

| First Time/Repeat Visitors to Lee County | | | | | |
|---|---|---|---|---|---|
| | **Annual** | **Winter (a) Jan-Mar08** | **Spring (b) Apr-Jun08** | **Summer (c) Jul-Sept08** | **Fall (d) Oct-Dec08** |
| First-time | 28% | 27%d | 27%d | 35%abd | 21% |
| Repeat | 71% | 71%c | 72%c | 64% | 77%ac |



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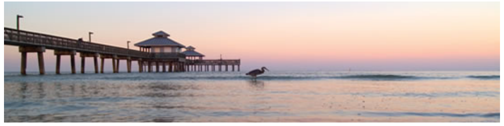
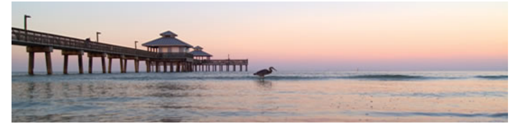


# January – December 2008 Lee County Snapshot

| TOTAL EXPENDITURES | | | | | |
|---|---|---|---|---|---|
| | Annual | Winter | Spring | Summer | Fall |
| Total Visitor Expenditures | $2,908,742,738 | $984,260,857 | $678,935,961 | $523,649,638 | $721,896,282 |
| Paid Accommodations | $1,686,431,443 | $637,437,111 | $401,835,039 | $277,270,224 | $401,250,140 |

| Average Expenditures per Person per Day | | | | |
|---|---|---|---|---|
| Annual | Winter Jan-Mar08 | Spring Apr-Jun08 | Summer Jul-Sept08 | Fall Oct-Dec08 |
| $124.17 | $139.30 | $127.74 | $113.66 | $117.49 |

| Average Occupancy Rate | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
|---|---|---|---|---|---|
| Total Property Managers Responding | 1,674 | 397 | 442 | 409 | 426 |
| Hotel/Motel/Resort/B&B | 54.2% | 67.8% | 57.3% | 44.9% | 47.5% |
| Condo/Cottage/Vacation Home | 50.6% | 75.6% | 50.2% | 34.8% | 42.4% |
| RV Park/Campground | 46.7% | 88.2% | 45.0% | 19.6% | 47.4% |
| AVERAGE | 51.6% | 73.6% | 52.5% | 36.6% | 46.1% |
| **Average Daily Rate** | | | | | |
| Total Property Managers Responding | 1,664 | 395 | 437 | 409 | 423 |
| Hotel/Motel/Resort/B&B | $146.57 | $186.73 | $145.57 | $113.82 | $124.02 |
| Condo/Cottage/Vacation Home | $187.44 | $234.93 | $172.06 | $156.02 | $150.12 |
| RV Park/Campground | $42.23 | $46.00 | $41.76 | $30.89 | $42.58 |
| AVERAGE | $136.50 | $171.85 | $131.74 | $114.17 | $109.55 |
| **RevPAR** | | | | | |
| Total Property Managers Responding | 1,674/1,664 | 397/395 | 442/437 | 409/409 | 426/423 |
| Hotel/Motel/Resort/B&B | $79.45 | $126.61 | $83.35 | $51.09 | $58.94 |
| Condo/Cottage/Vacation Home | $94.88 | $177.62 | $86.35 | $54.28 | $63.68 |
| RV Park/Campground | $19.73 | $40.58 | $18.81 | $6.06 | $20.18 |
| AVERAGE | $70.40 | $126.43 | $69.11 | $41.75 | $50.54 |



# Visitor Profile Analysis
# January – December 2008

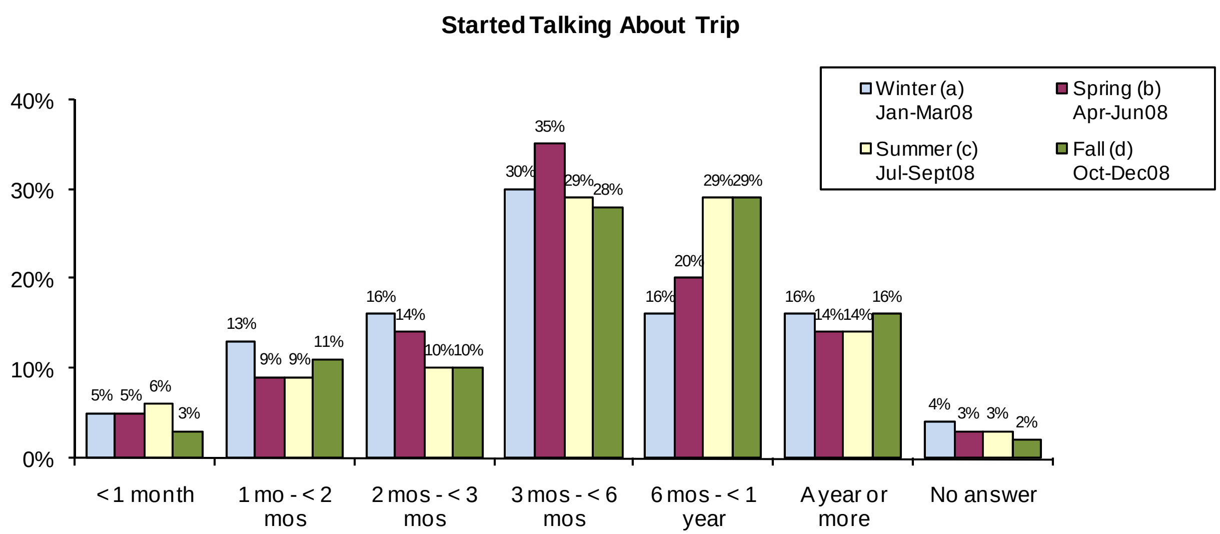
*A total of 2,444 interviews were conducted with visitors in Lee County during the period of January – December 2008. A total sample of this size is considered accurate to plus or minus 1.96 percentage points at the 95% confidence level.*

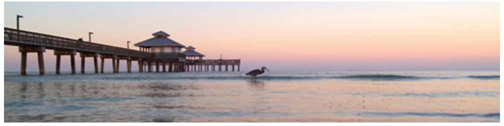
*Throughout this report, statistically significant differences between percentages are noted by a, b, c, and d.*

# Travel Planning

| Started Talking About Trip | | | | | |
|---|---|---|---|---|---|
| | **Annual** | **Winter (a) Jan-Mar08** | **Spring (b) Apr-Jun08** | **Summer (c) Jul-Sept08** | **Fall (d) Oct-Dec08** |
| Total Respondents | 2,444 | 624 | 600 | 608 | 612 |
| < 1 month | 5% | 5% | 5% | 6%d | 3% |
| 1 mo - < 2 mos | 11% | 13% | 9% | 9% | 11% |
| 2 mos - < 3 mos | 13% | 16% cd | 14%c | 10% | 10% |
| 3 mos - < 6 mos | 30% | 30% | 35% acd | 29% | 28% |
| 6 mos - < 1 year | 23% | 16% | 20% | 29%ab | 29%ab |
| A year or more | 15% | 16% | 14% | 14% | 16% |
| No answer | 3% | 4% | 3% | 3% | 2% |

Q3: When did you “start talking” about going on this trip?

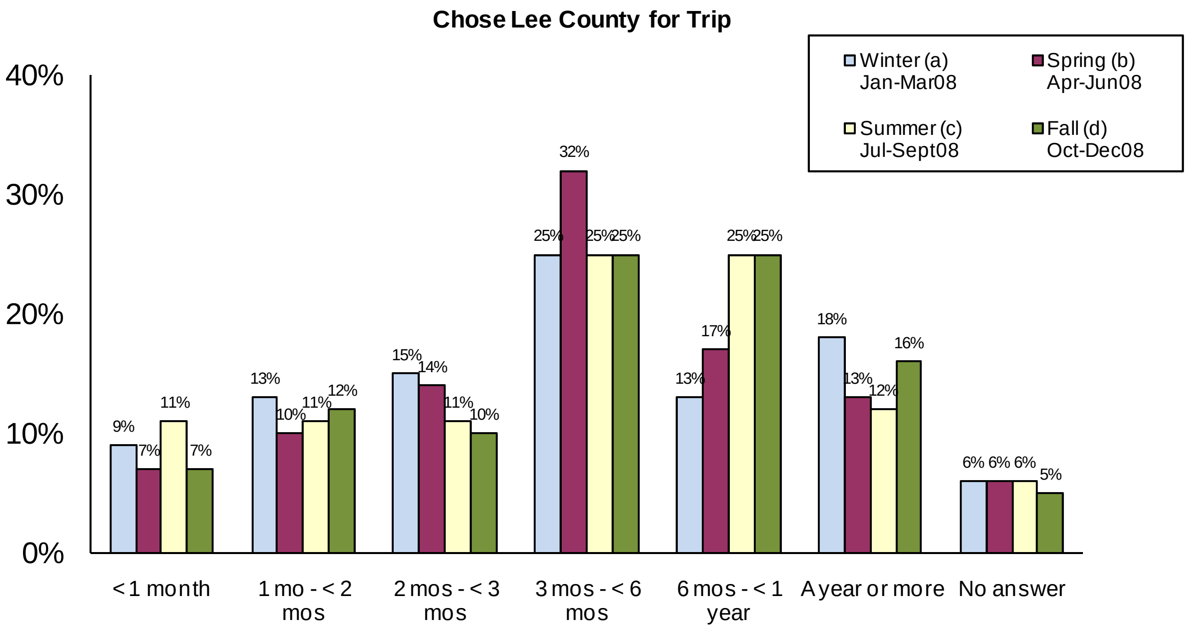




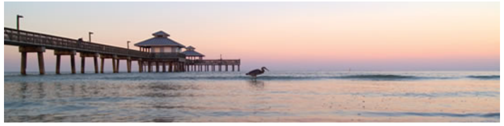
# Travel Planning

| Chose Lee County for Trip | | | | | |
|---|---|---|---|---|---|
| | **Annual** | **Winter (a) Jan-Mar08** | **Spring (b) Apr-Jun08** | **Summer (c) Jul-Sept08** | **Fall (d) Oct-Dec08** |
| Total Respondents | 2,444 | 624 | 600 | 608 | 612 |
| < 1 month | 8% | 9% | 7% | 11%bd | 7% |
| 1 mo - < 2 mos | 11% | 13% | 10% | 11% | 12% |
| 2 mos - < 3 mos | 13% | 15%cd | 14%cd | 11% | 10% |
| 3 mos - < 6 mos | 27% | 25% | 32%acd | 25% | 25% |
| 6 mos - < 1 year | 20% | 13% | 17%a | 25%ab | 25%ab |
| A year or more | 15% | 18%bc | 13% | 12% | 16%c |
| No answer | 6% | 6% | 6% | 6% | 5% |

Q4: When did you choose Lee County for this trip?



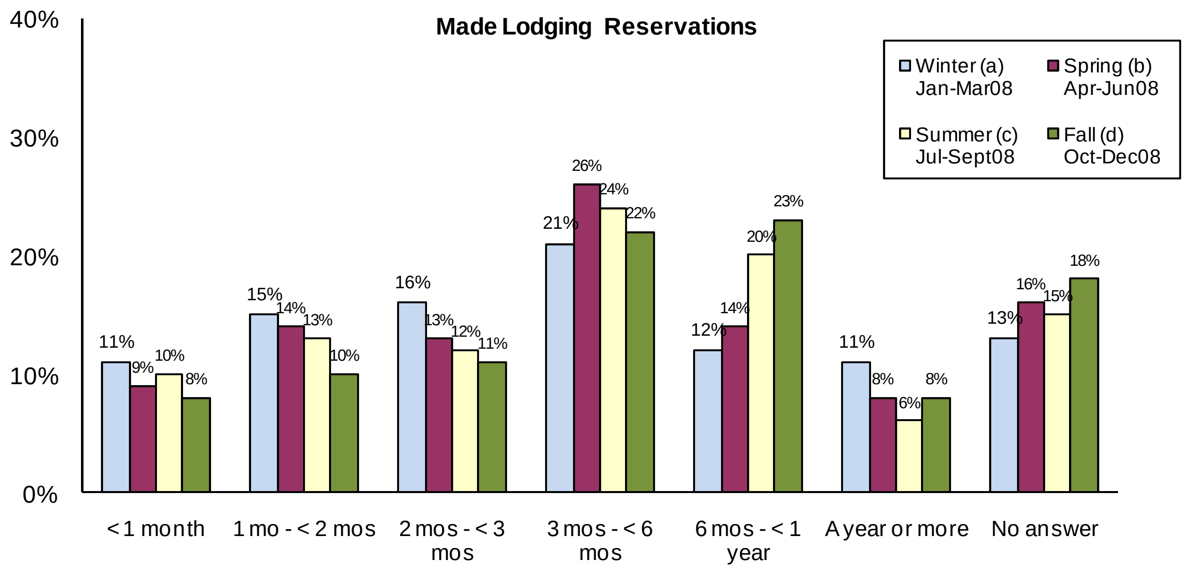
the beaches of FORT MYERS SANIBEL



# Travel Planning

| Made Lodging Reservations | | | | | |
|---|---|---|---|---|---|
| | **Annual** | **Winter (a) Jan-Mar08** | **Spring (b) Apr-Jun08** | **Summer (c) Jul-Sept08** | **Fall (d) Oct-Dec08** |
| Total Respondents | 2,444 | 624 | 600 | 608 | 612 |
| < 1 month | 9% | 11% | 9% | 10% | 8% |
| 1 mo - < 2 mos | 13% | 15%d | 14% | 13% | 10% |
| 2 mos - < 3 mos | 13% | 16%cd | 13% | 12% | 11% |
| 3 mos - < 6 mos | 23% | 21% | 26%a | 24% | 22% |
| 6 mos - < 1 year | 17% | 12% | 14% | 20%ab | 23%ab |
| A year or more | 8% | 11%cd | 8% | 6% | 8% |
| No answer | 16% | 13% | 16% | 15% | 18%a |

Q5: When did you make lodging reservations for this trip?



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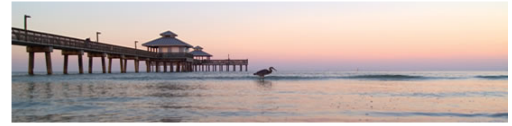
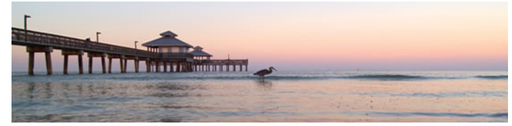


# Travel Planning

| Reserved Accommodations | | | | | |
|---|---|---|---|---|---|
| | **Annual** | **Winter (a) Jan-Mar08** | **Spring (b) Apr-Jun08** | **Summer (c) Jul-Sept08** | **Fall (d) Oct-Dec08** |
| Total Respondents | 2,444 | 624 | 600 | 608 | 612 |
| Before leaving home | 80% | 80% | 82%d | 82%d | 76% |
| After arriving in Florida | 6% | 7% | 5% | 7% | 6% |
| On the road, but not in Florida | <1% | 1%c | 1% | <1% | <1% |
| No Answer | 14% | 12% | 13% | 11% | 18% |

Q6: Did you make accommodations reservations for your stay in Lee County:



# Travel Planning

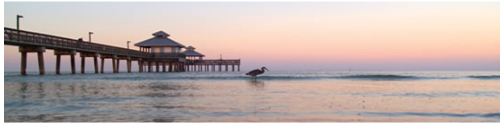
| Computer Access | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
|---|---|---|---|---|---|
| Total Respondents | 2,444 | 624 | 600 | 608 | 612 |
| Yes | 91% | 89% | 93% | 92% | 88% |
| *Home* | 24% | 30%bcd | 20% | 21% | 25%b |
| *Work* | 3% | 4%c | 3% | 1% | 2% |
| *Both Home and Work* | 64% | 55% | 70%ad | 70%ad | 61%a |
| No | 8% | 10%bc | 7% | 7% | 10%bc |

Q8: Do you have access to a computer?

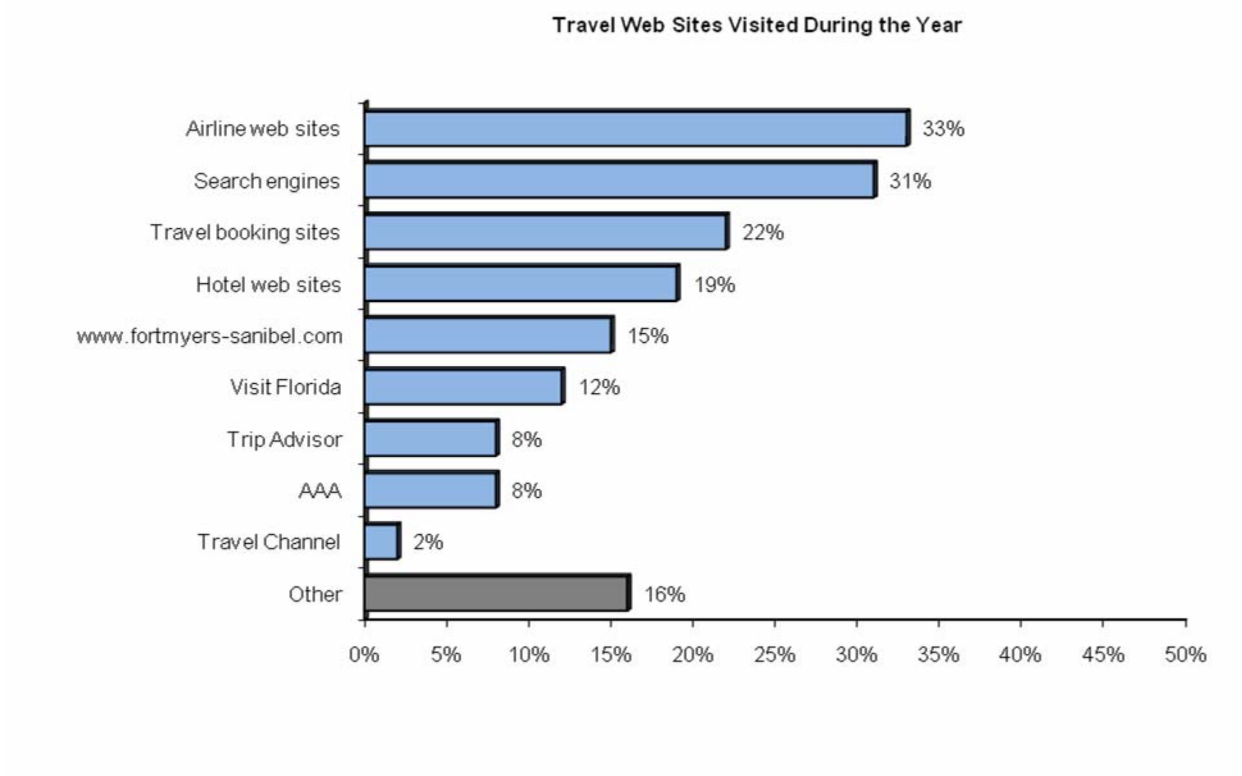
# Travel Planning

| Travel Web Sites Visited | | | | | |
|---|---|---|---|---|---|
| | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
| Total Respondents with computer access | 2,207 | 556 | 554 | 561 | 536 |
| Visited web sites (net) | 77% | 73% | 78% | 81%a | 77% |
| *Airline web sites* | 33% | 31% | 31% | 32% | 36% |
| *Search engines* | 31% | 28% | 32%d | 38%ad | 26% |
| *Travel booking sites* | 22% | 22% | 24%d | 24%d | 17% |
| *Hotel web sites* | 19% | 23%bc | 17% | 18% | 19% |
| www.fortmyers-sanibel.com | 15% | 16%d | 17%d | 16%d | 11% |
| *Visit Florida* | 12% | 8% | 13%a | 15%a | 13%a |
| *Trip Advisor* | 8% | 5% | 9%a | 9%a | 9%a |
| *AAA* | 8% | 8% | 8% | 8% | 8% |
| *Travel Channel* | 2% | 1% | 2% | 1% | 2% |
| *Other* | 16% | 13% | 17%a | 17%a | 17% |
| Did not visit web sites | 19% | 23%bc | 18% | 15% | 20%c |
| No Answer | 4% | 4% | 4% | 4% | 3% |

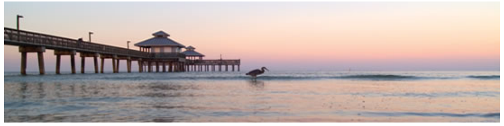
Q9: While planning this trip, which of the following web sites did you visit? (Please mark ALL that apply)



# Travel Planning




**Base: Respondents with Computer Access**



## Travel Planning

| Requesting Information | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
|---|---|---|---|---|---|
| Total Respondents | 2,444 | 624 | 600 | 608 | 612 |
| Requested Information (net) | 32% | 32% | 32% | 34%d | 27% |
| *Hotel Web Site* | 11% | 11% | 12% | 11% | 10% |
| *Call hotel* | 6% | 8%cd | 6% | 5% | 5% |
| *VCB Web Site* | 6% | 5% | 7% | 10%ad | 4% |
| *Visitor guide* | 5% | 5% | 6% | 6% | 4% |
| *Call local Chamber of Commerce* | 1% | 2% | 2% | 1% | 1% |
| *Clipping and mailing coupon* | 1% | 1% | <1% | 1% | 1% |
| *Returning a Magazine's Reader Service Card* | <1% | 1% | 1% | <1% | <1% |
| *Call VCB* | 1% | <1% | 1% | <1% | 1% |
| *Other* | 13% | 14% | 13% | 13% | 11% |
| Did not request information | 55% | 55% | 55% | 52% | 59%c |
| No Answer | 13% | 13% | 13% | 14% | 14% |

Q10: For this trip, did you request any information about our area by…(Please mark ALL that apply.)

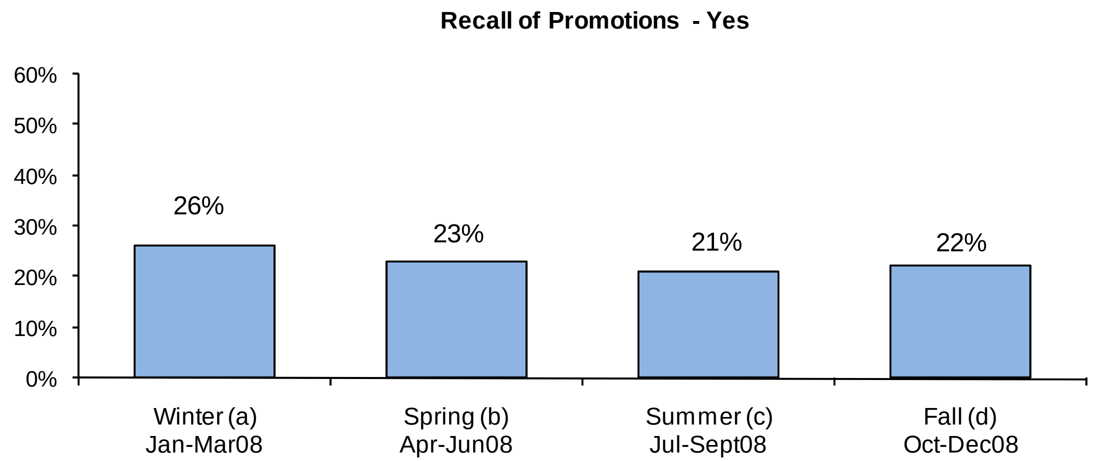
| Travel Agent Assistance | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
|---|---|---|---|---|---|
| Total Respondents | 2,444 | 624 | 600 | 608 | 612 |
| Yes | 6% | 5% | 5% | 7% | 9%ab |
| No | 92% | 94%cd | 94%cd | 90% | 89% |

Q11: Did a travel agent assist you with this trip?

# Travel Planning

| Recall of Lee County Promotions | | | | | |
|---|---|---|---|---|---|
| | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
| Total Respondents | 2,444 | 624 | 600 | 608 | 612 |
| Yes | 23% | 26% | 23% | 21% | 22% |
| No | 57% | 55% | 56% | 57% | 61%a |
| Can't Recall | 18% | 18% | 18% | 19%d | 15% |

Q13: Over the past six months, have you seen, read or heard any travel stories, advertising or promotions for the Lee County area?



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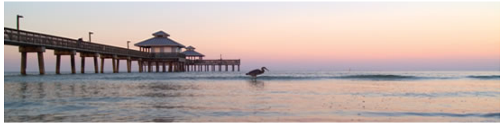


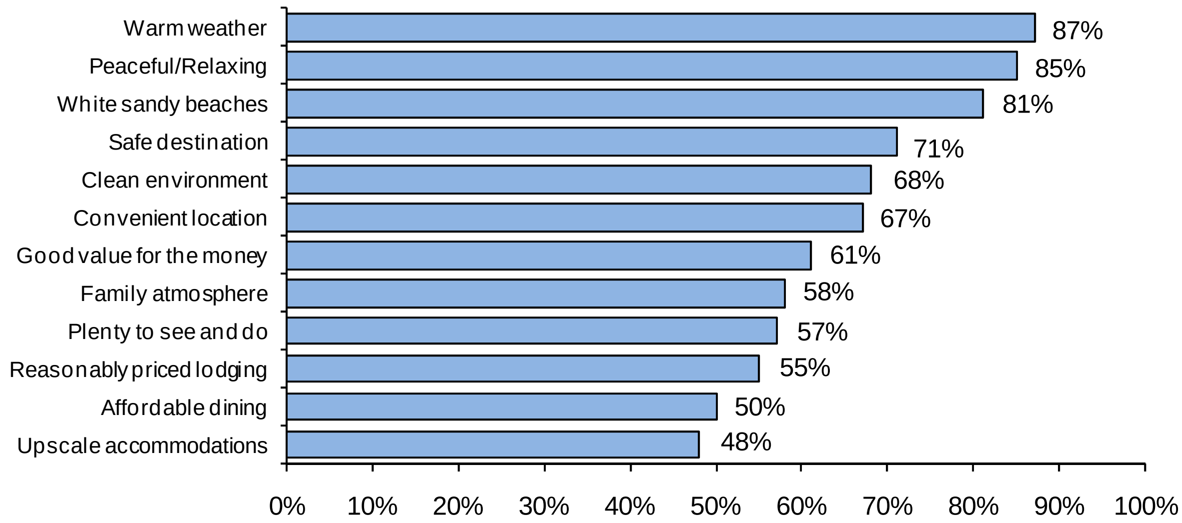
# Travel Planning

| Travel Decision Influences | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | Top 2 Box Scores | | | | | | Top 2 Box Scores | | | | |
| | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 | | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
| Peaceful/Relaxing | 85% | 84% | 89%acd | 84% | 83% | Good value for the money | 61% | 56% | 65%a | 66%ad | 59% |
| Warm weather | 87% | 92%bc | 88%c | 79% | 90c% | Family atmosphere | 58% | 52% | 66%ad | 61%ad | 53% |
| White sandy beaches | 81% | 80% | 83% | 81% | 82% | Plenty to see and do | 57% | 56% | 59% | 56% | 56% |
| Safe destination | 71% | 68% | 77%acd | 71% | 69% | Reasonably priced lodging | 55% | 54% | 57%d | 59%d | 51% |
| Clean environment | 68% | 65% | 74%ad | 69% | 66% | Affordable dining | 50% | 47% | 53% | 53%a | 48% |
| Convenient location | 67% | 65% | 68% | 67% | 68% | Upscale accommodations | 48% | 44% | 49% | 52%ad | 46% |

Q14: When you were talking about coming to Lee County, if one (1) is "Not at All Influential" and five (5) is "Definitely Influential," how strongly did the following influence your selection?

**Percentages shown reflect top 2 box scores (rating of 4 or 5)*

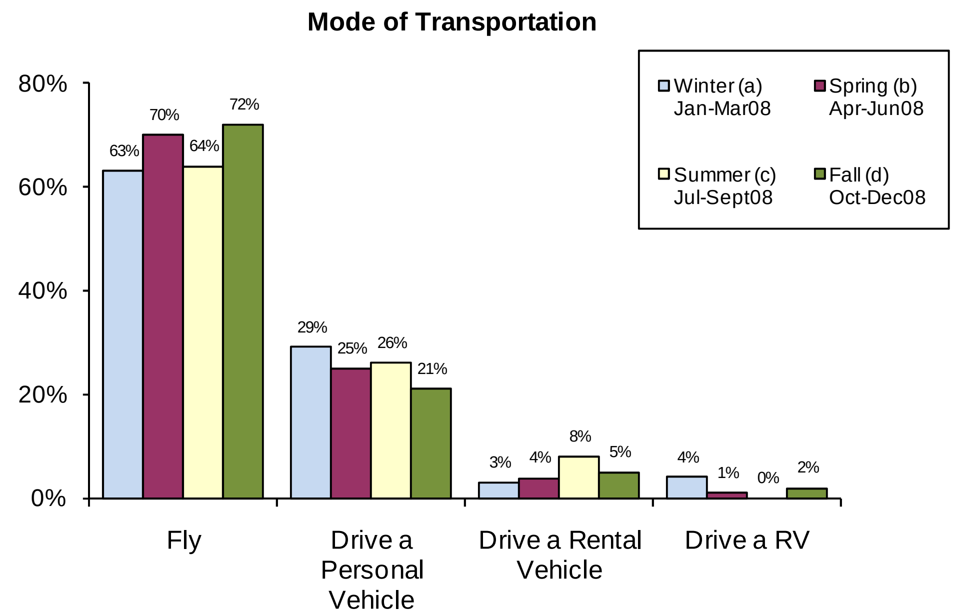
**Travel Decision Influences - Annual**

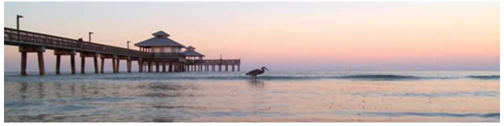


# Trip Profile

| Mode of Transportation | | | | | |
|---|---|---|---|---|---|
| | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
| Total Respondents | 2,444 | 624 | 600 | 608 | 612 |
| Fly | 67% | 63% | 70%a | 64% | 72%ac |
| Drive a Personal Vehicle | 25% | 29%d | 25% | 26%d | 21% |
| Drive a Rental Vehicle | 5% | 3% | 4% | 8%abd | 5% |
| Drive a RV | 2% | 4%bcd | 1% | <1% | 2%c |
| No Answer | 1% | <1% | 1% | <1% | 1% |

Q1: How did you travel to our area? Did you…

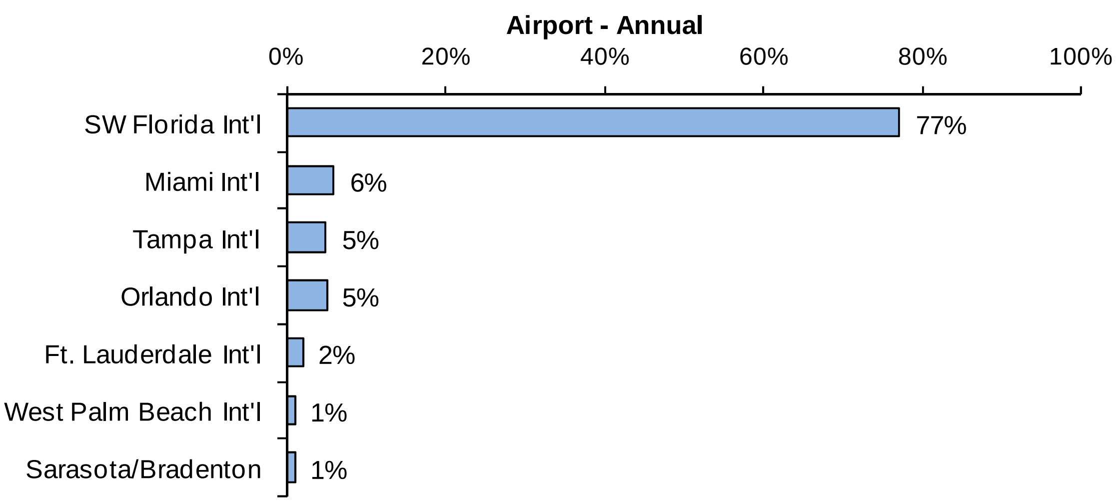


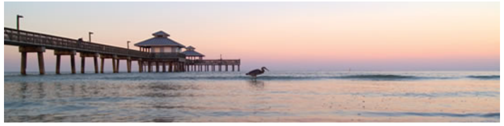


# Trip Profile

| Airport | | | | | |
|---|---|---|---|---|---|
| | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
| Total Respondents who Flew | 1,642 | 394 | 417 | 391 | 440 |
| SW Florida Int'l | 77% | 77%c | 80%c | 71% | 80%c |
| Miami Int'l | 6% | 4% | 3% | 10%ab | 9%ab |
| Tampa Int'l | 5% | 6%cd | 6%cd | 3% | 3% |
| Orlando Int'l | 5% | 4% | 4% | 9%abd | 4% |
| Ft. Lauderdale Int'l | 2% | 2% | 1% | 3%bd | 1% |
| West Palm Beach Int'l | 1% | 1% | <1% | <1% | <1% |
| Sarasota/Bradenton | 1% | <1% | 1% | 1% | <1% |
| Other | 3% | 4%cd | 4%d | 2% | 1% |

Q2: At which Florida airport did you land?

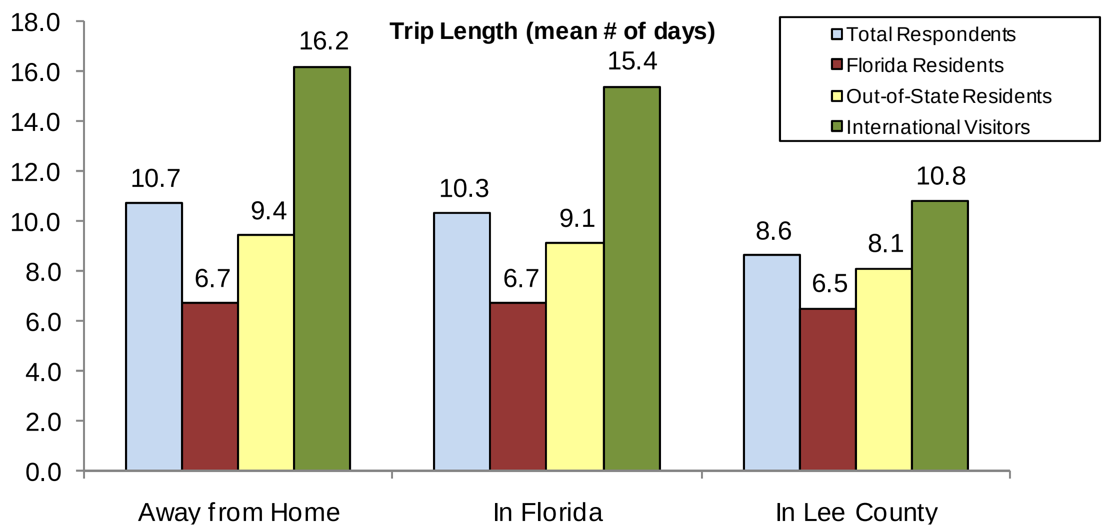




# Trip Profile

| Trip Length | | | | |
|---|---|---|---|---|
| | Total Respondents | Florida Residents | Out-of-State Residents | International Visitors |
| Annual | 2,444 | 137 | 1,445 | 529 |
| | Mean # of days | Mean # of days | Mean # of days | Mean # of days |
| Away from Home | 10.7 | 6.7 | 9.4 | 16.2 |
| In Florida | 10.3 | 6.7 | 9.1 | 15.4 |
| In Lee County | 8.6 | 6.5 | 8.1 | 10.8 |

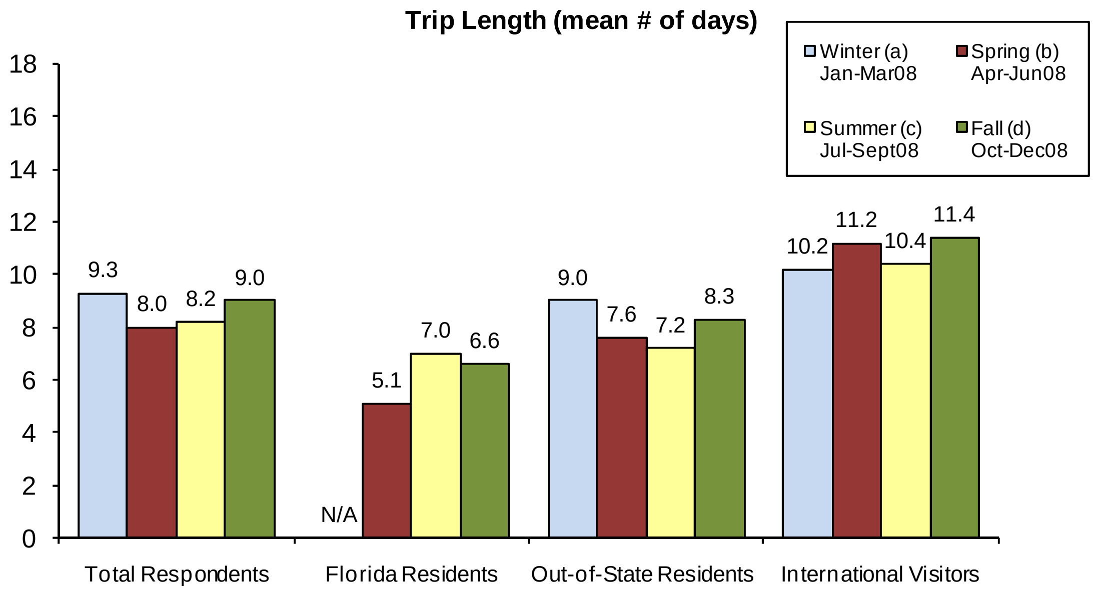
Q7: On this trip, how many days will you be:

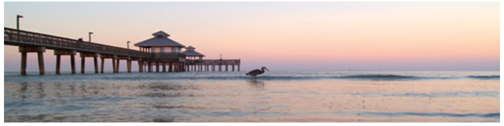


# Trip Profile

| Trip Length - In Lee County | | | | | |
|---|---|---|---|---|---|
| | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
| Total Respondents | 2,444 | 624 | 600 | 608 | 612 |
| | Mean # of days | Mean # of days | Mean # of days | Mean # of days | Mean # of days |
| Total Respondents | 8.6 | 9.3bc | 8.0 | 8.2 | 9.0bc |
| Florida Residents* | 6.5 | N/A | 5.1 | 7.0 | 6.6 |
| Out-of-State Residents | 8.1 | 9.0bcd | 7.6 | 7.2 | 8.3 |
| International Visitors | 10.8 | 10.2 | 11.2ac | 10.4 | 11.4ac |

Q7: On this trip, how many days will you be:
*Note: Insufficient number of responses for reliable statistical analysis. Please interpret results with caution.
N/A = Base too small for statistical analysis.

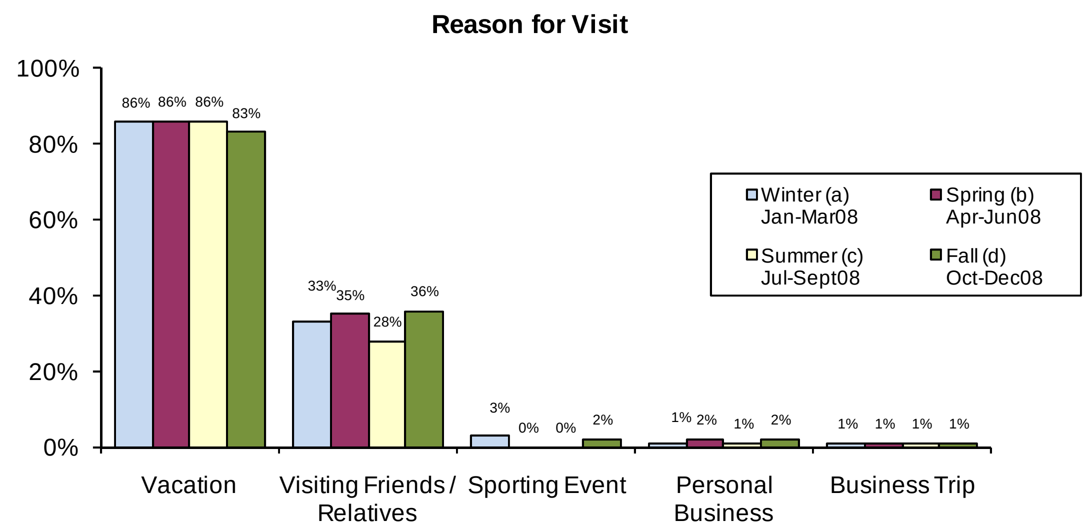


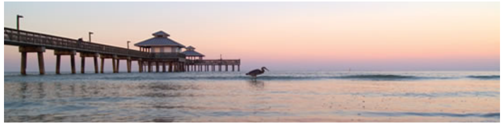


# Trip Profile

| Reason for Visit | | | | | |
|---|---|---|---|---|---|
| | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
| Total Respondents | 2,444 | 624 | 600 | 608 | 612 |
| Vacation | 86% | 86% | 86% | 86% | 83% |
| Visiting Friends / Relatives | 33% | 33% | 35%c | 28% | 36%c |
| Sporting Event | 2% | 3%bc | <1% | <1% | 2%bc |
| Personal Business | 1% | 1% | 2% | 1% | 2% |
| Business Trip | 1% | 1% | 1% | 1% | 1% |
| Other | 3% | 5%d | 4% | 3% | 2% |

Q15: Did you come to our area for… (Please mark all that apply.)

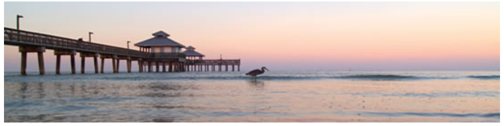




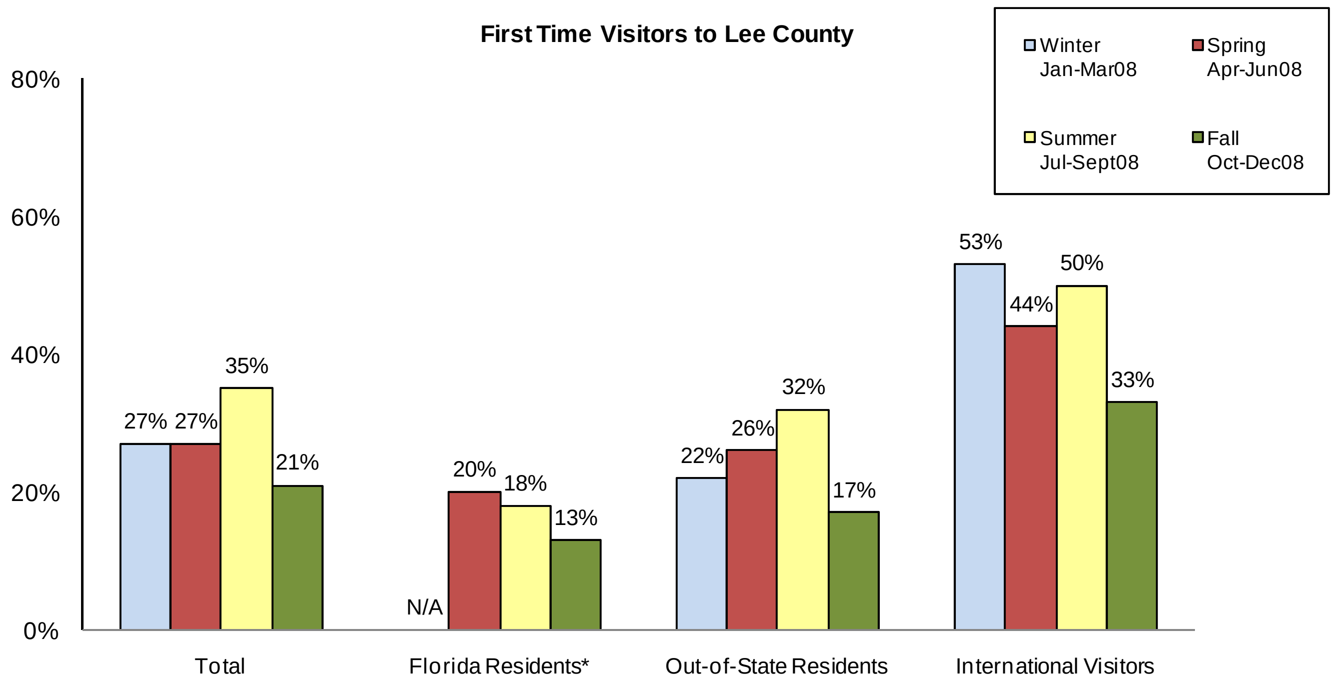
# Trip Profile

| First Time Visitors to Lee County | | | | | |
|---|---|---|---|---|---|
| | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
| **Total** | | | | | |
| Base: Total Respondents | 2,444 | 624 | 600 | 608 | 612 |
| Yes | 28% | 27%d | 27%d | 35%abd | 21% |
| No | 71% | 71%c | 72%c | 64% | 77%ac |
| No answer | 1% | 2% | 1% | 1% | 2% |
| | | | | | |
| **Florida Residents** | | | | | |
| Base: Florida Residents | 137 | 11 | 34* | 68 | 23* |
| Yes | 19% | N/A | 20% | 18% | 13% |
| No | 80% | N/A | 77% | 82% | 81% |
| No answer | 2% | N/A | 3% | -- | 6% |
| | | | | | |
| **Out-of-State Residents** | | | | | |
| Base: Out-of-State Residents | 1,445 | 423 | 400 | 292 | 329 |
| Yes | 24% | 22% | 26% | 32% | 17% |
| No | 75% | 77% | 74% | 68% | 82% |
| No answer | 1% | 1% | 1% | <1% | 1% |
| | | | | | |
| **International Visitors** | | | | | |
| Base: International Visitors | 529 | 102 | 80 | 179 | 167 |
| Yes | 44% | 53%b | 44% | 50% | 33% |
| No | 54% | 47% | 56% | 49% | 64% |
| No answer | 1% | 1% | -- | 1% | 2% |

Q20: Is this your first visit to Lee County?
*Note: Insufficient number of responses for reliable statistical analysis. Please interpret results with caution.
N/A = Base too small for statistical analysis



## Trip Profile

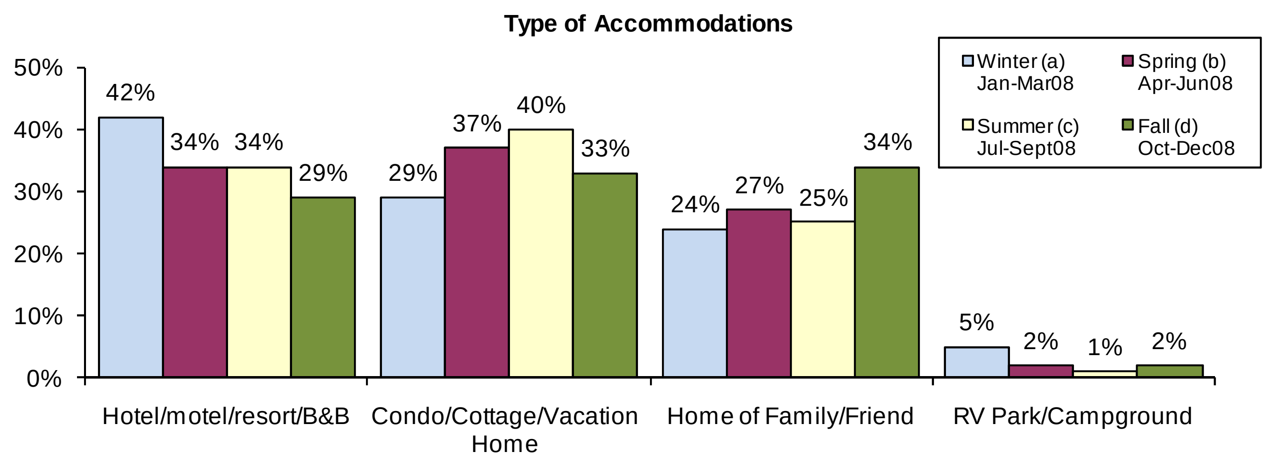


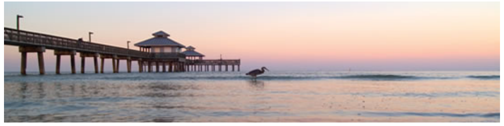

Q20: Is this your first visit to Lee County?
*Note: Insufficient number of responses for reliable statistical analysis during spring and fall seasons. Please interpret results with caution.
N/A = Base too small for statistical analysis.

# Trip Profile

| Type of Accommodations | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
|---|---|---|---|---|---|
| Total Respondents: | 2,444 | 624 | 600 | 608 | 612 |
| **Hotel/Motel/Resort/B&B** | **34%** | **42%bcd** | **34%** | **34%** | **29%** |
| Hotel/motel/inn | 24% | 31%bcd | 24% | 22% | 21% |
| Resort | 10% | 11% | 10% | 11% | 8% |
| B&B | <1% | <1% | <1% | 1% | <1% |
| **Home of family/friend** | **27%** | **24%** | **27%** | **25%** | **34%abc** |
| **Condo/Cottage/Vacation Home** | **34%** | **29%** | **37%a** | **40%ad** | **33%** |
| Rented home/condo | 25% | 23% | 27% | 28% | 23% |
| Borrowed home/condo | 6% | 4% | 7% | 6% | 7%a |
| Owned home/condo | 3% | 2% | 3% | 6%abd | 3% |
| **RV Park/Campground** | **3%** | **5%bcd** | **2%c** | **1%** | **2%** |
| **Day trip (no accommodations)** | **1%** | **1%** | **<1%** | **<1%** | **<1%** |
| No answer | <1% | -- | <1% | -- | <1% |

Q25: Are you staying overnight (either last night or tonight)…

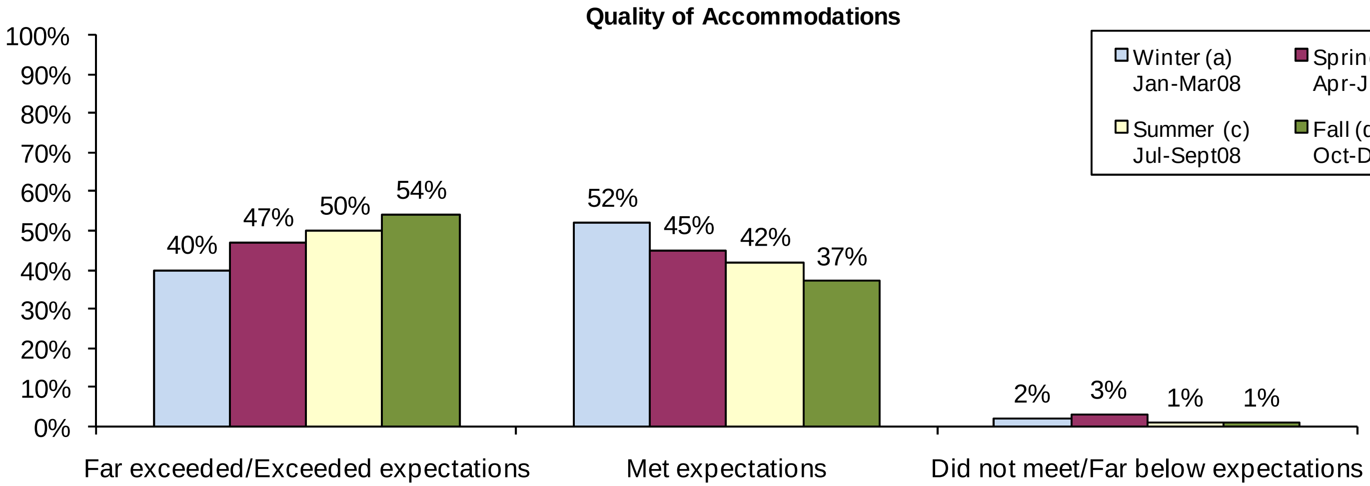




# Trip Profile

| Quality of Accommodations | | | | | |
|---|---|---|---|---|---|
| | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
| Total Respondents | 2,444 | 624 | 600 | 608 | 612 |
| Far exceeded/Exceeded expectations | 48% | 40% | 47%a | 50%a | 54%ab |
| Met expectations | 44% | 52%bcd | 45%d | 42% | 37% |
| Did not meet/Far below expectations | 2% | 2% | 3% | 1% | 1% |
| No Answer | 6% | 6% | 5% | 7% | 8% |

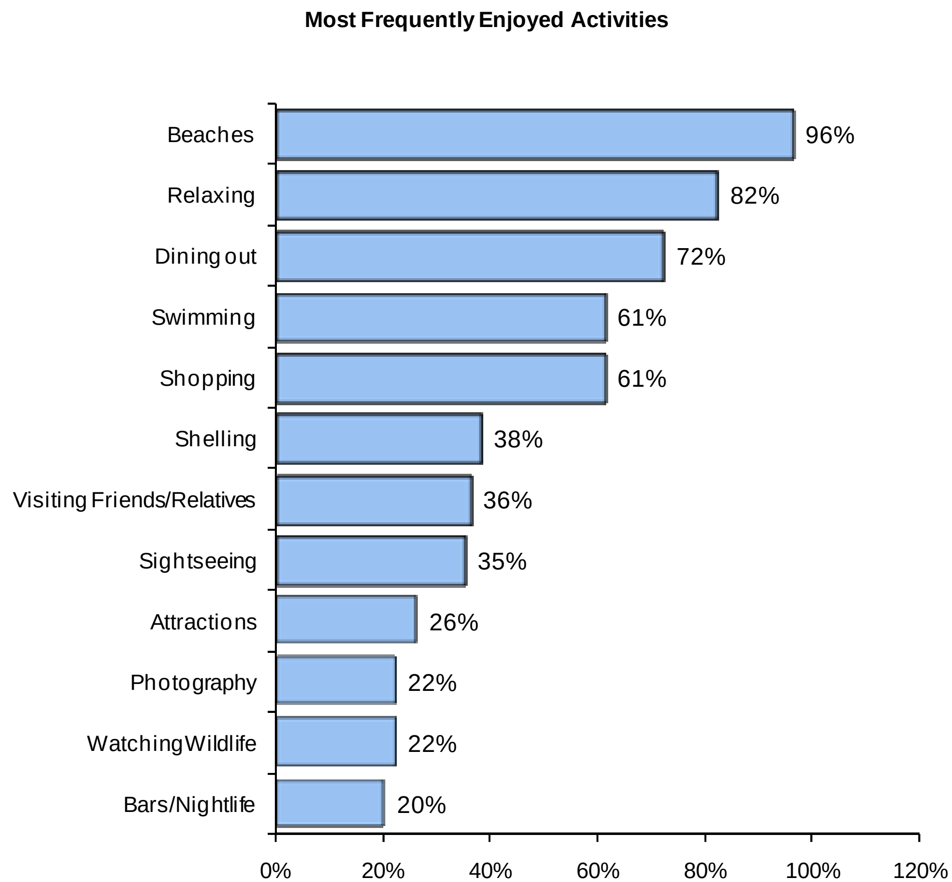
Q26: How would you describe the quality of your accommodations?  Do you feel that they:



the beaches of FORT MYERS SANIBEL

# Trip Activities

| Activities Enjoyed | |
|---|---|
| Total Respondents | 2,444 |
| Beaches | 96% |
| Relaxing | 82% |
| Dining out | 72% |
| Swimming | 61% |
| Shopping | 61% |
| Shelling | 38% |
| Visiting Friends/Relatives | 36% |
| Sightseeing | 35% |
| Attractions | 26% |
| Photography | 22% |
| Watching Wildlife | 22% |
| Bars/Nightlife | 20% |
| Bicycle Riding | 16% |
| Exercise/Working Out | 16% |
| Birdwatching | 14% |
| Fishing | 12% |
| Miniature Golf | 11% |
| Boating | 10% |
| Golfing | 10% |
| Parasailing/Jet Skiing | 8% |
| Guided Tour | 5% |
| Sporting Event | 5% |
| Kayaking/Canoeing | 5% |
| Cultural Events | 4% |
| Tennis | 4% |
| Scuba Diving/Snorkeling | 3% |
| Other | 4% |




Q28: What activities or interests are you enjoying while in Lee County?
*(Please mark ALL that apply.)*



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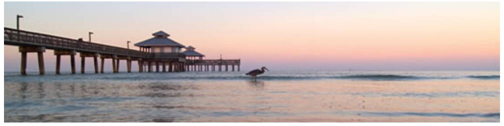
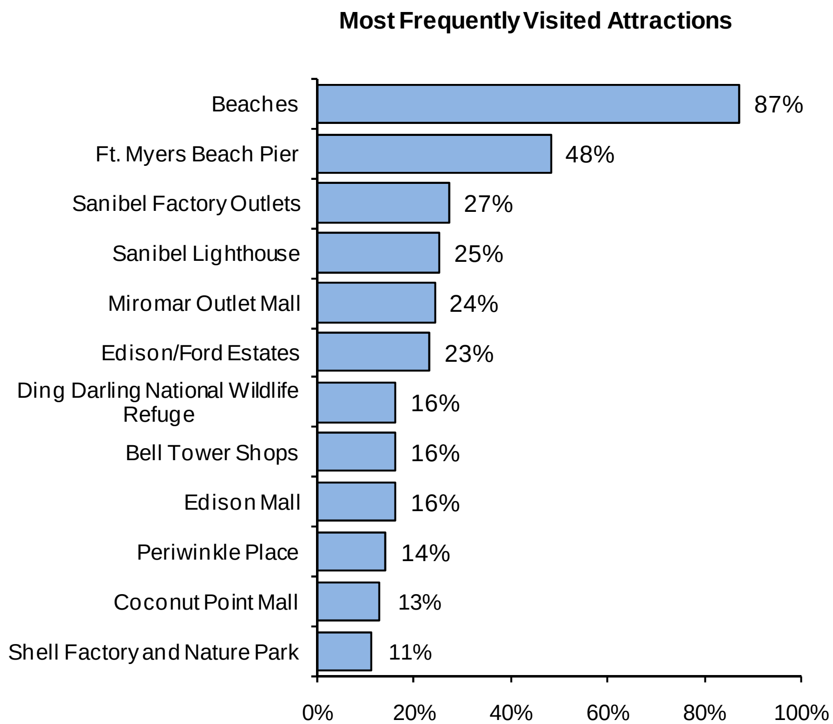


# Trip Activities

| Attractions Visited | |
|---|---|
| Total Respondents | 2,444 |
| Beaches | 87% |
| Ft. Myers Beach Pier | 48% |
| Sanibel Factory Outlets | 27% |
| Sanibel Lighthouse | 25% |
| Miromar Outlet Mall | 24% |
| Edison/Ford Estates | 23% |
| Ding Darling National Wildlife Refuge | 16% |
| Bell Tower Shops | 16% |
| Edison Mall | 16% |
| Periwinkle Place | 14% |
| Coconut Point Mall | 13% |
| Shell Factory and Nature Park | 11% |
| Gulf Coast Town Center | 8% |
| Manatee Park | 4% |
| Bailey-Matthews Shell Museum | 3% |
| Broadway Palm Dinner Theatre | 3% |
| Barbara B. Mann Performing Arts Hall | 1% |
| Babcock Wilderness Adventures | 1% |
| Other | 6% |
| None/No Answer | 3% |

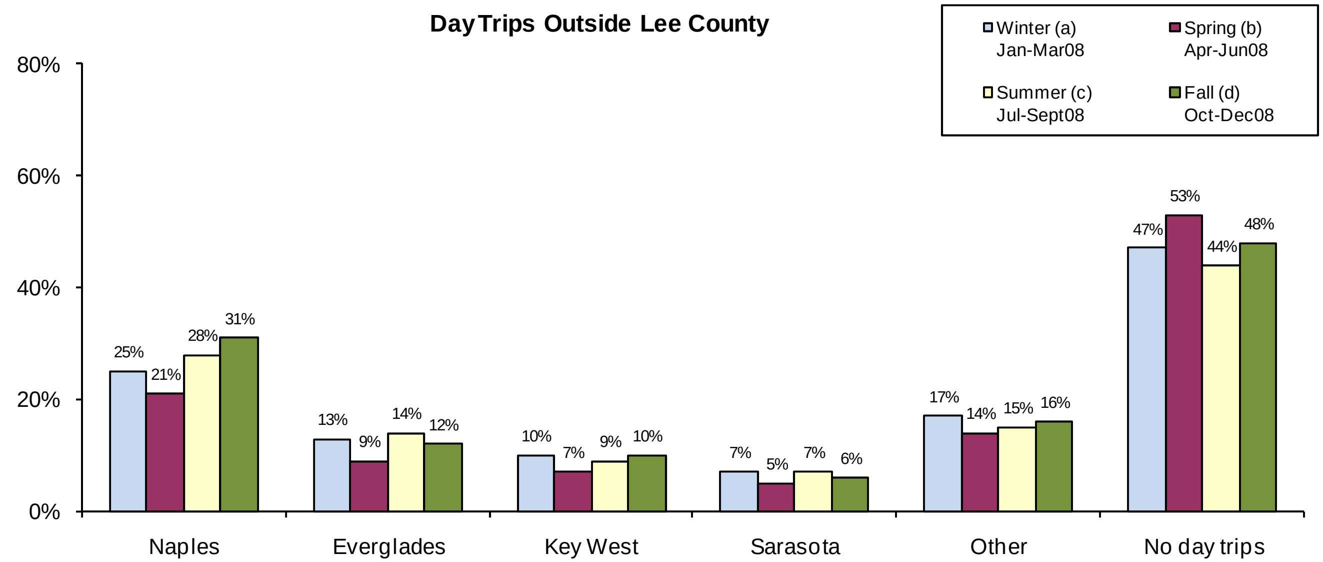



Q29: On this trip, which attractions are you visiting? *(Please mark ALL that apply.)*

# Trip Activities

| Day Trips Outside Lee County | | | | | |
|---|---|---|---|---|---|
| | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
| Total Respondents | 2,444 | 624 | 600 | 608 | 612 |
| Any Day Trips (net) | 46% | 47%b | 41% | 48%b | 48%b |
| *Naples* | 27% | 25% | 21% | 28%b | 31%ab |
| *Everglades* | 12% | 13% | 9% | 14%b | 12% |
| *Key West* | 9% | 10% | 7% | 9% | 10% |
| *Sarasota* | 6% | 7% | 5% | 7% | 6% |
| *Other* | 15% | 17% | 14% | 15% | 16% |
| No day trips | 48% | 47% | 53%c | 44% | 48% |
| No answer | 6% | 6% | 6% | 8% | 4% |

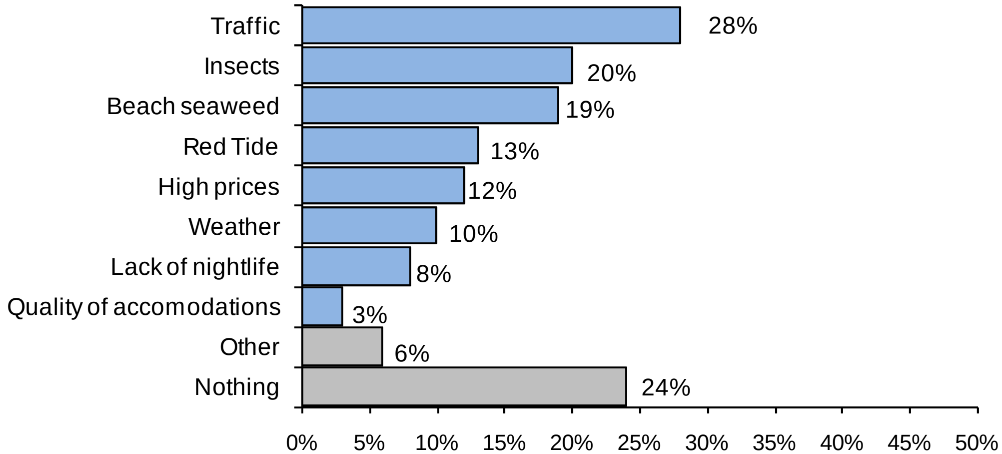
Q30: Where did you go on day trips outside Lee County?

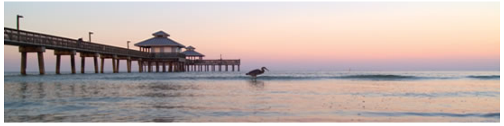


# Lee County Experience

| Lee County Experience and Future Plans | | | | | |
|---|---|---|---|---|---|
| **Least Liked Features** | **Annual** | **Winter (a) Jan-Mar08** | **Spring (b) Apr-Jun08** | **Summer (c) Jul-Sept08** | **Fall (d) Oct-Dec08** |
| Total Respondents | 2,444 | 624 | 600 | 608 | 612 |
| Traffic | 28% | 45%bcd | 27%c | 12% | 28%c |
| Insects | 20% | 7% | 22%ad | 37%abd | 16%a |
| Beach seaweed | 19% | 18%d | 16%d | 32%abd | 11% |
| Red Tide | 13% | 16%bd | 10% | 14%b | 12% |
| High prices | 12% | 15%c | 13%c | 7% | 13%c |
| Weather | 10% | 12%b | 6% | 15%bd | 9%b |
| Lack of nightlife | 8% | 6% | 7% | 9% | 10%a |
| Quality of accomodations | 3% | 3% | 2% | 4%b | 2% |
| Other | 6% | 5% | 5% | 8% | 5% |
| Nothing | 24% | 23%c | 27%c | 18% | 30%ac |

Q34: Which features do you like least about this area? *(Please mark ALL that apply.)*

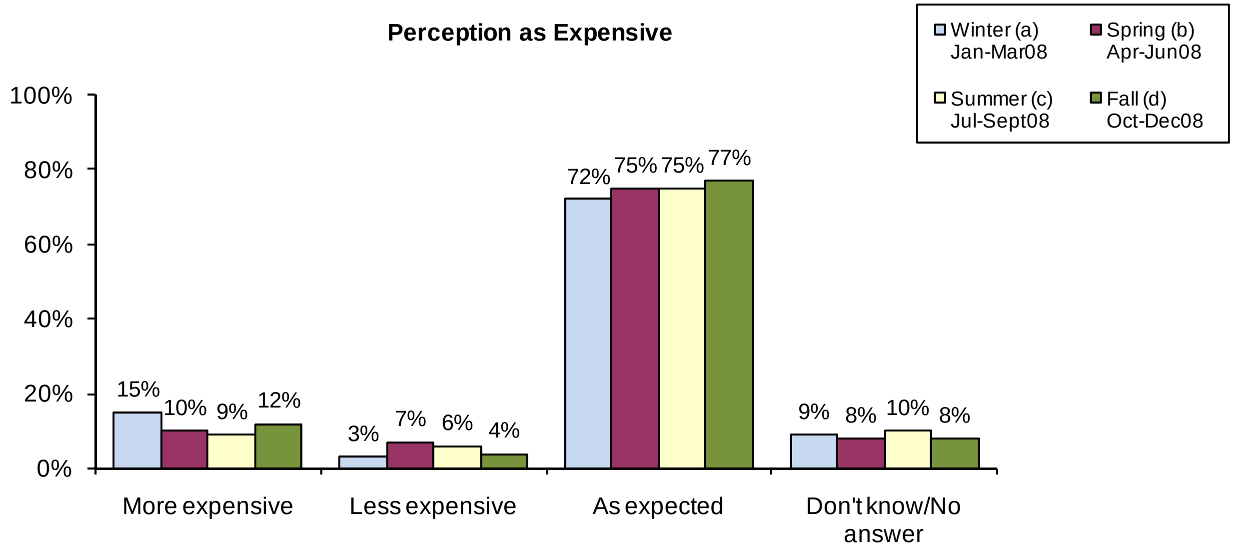




# Lee County Experience

| Perception of Lee County as Expensive | | | | | |
|---|---|---|---|---|---|
| **Perception of Lee County as Expensive** | **Annual** | **Winter (a) Jan-Mar08** | **Spring (b) Apr-Jun08** | **Summer (c) Jul-Sept08** | **Fall (d) Oct-Dec08** |
| Total Respondents | 2,444 | 624 | 600 | 608 | 612 |
| More expensive | 11% | 15%bc | 10% | 9% | 12% |
| Less expensive | 5% | 3% | 7%ad | 6%a | 4% |
| As expected | 75% | 72% | 75% | 75% | 77%a |
| Don't know/No answer | 9% | 9% | 8% | 10% | 8% |

Q31: From your experience, would you say that our area is more expensive, less expensive, or as expensive as you had expected?

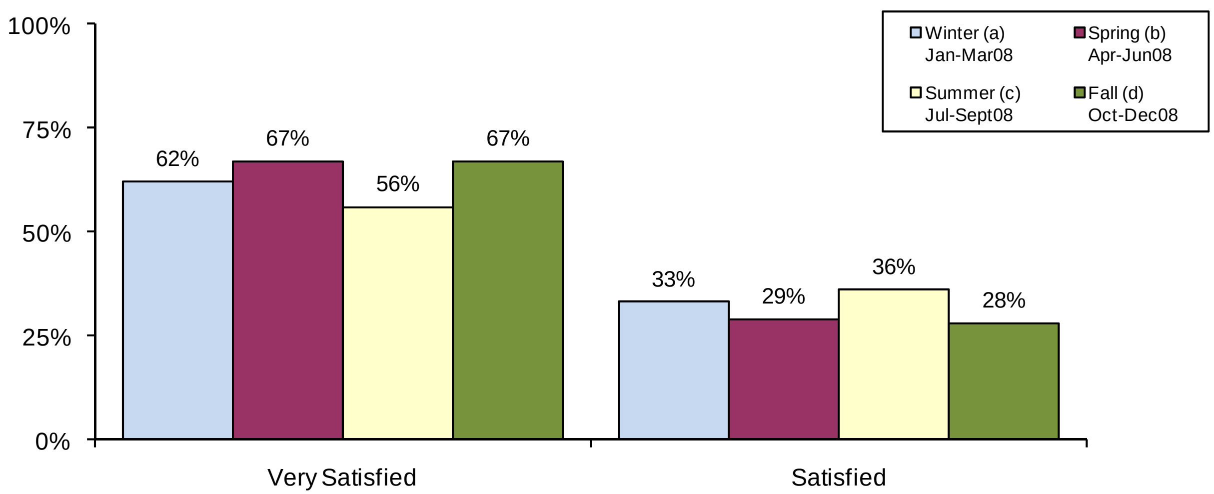


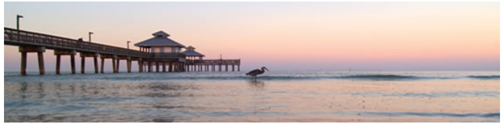
# Lee County Experience

| Satisfaction with Visit | | | | | |
|---|---|---|---|---|---|
| Satisfaction with Visit | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
| Total Respondents | 2,444 | 624 | 600 | 608 | 612 |
| Satisfied | 94% | 94% | 96%c | 93% | 95%c |
| *Very Satisfied* | 63% | 62% | 67%c | 56% | 67%ac |
| *Satisfied* | 32% | 33% | 29% | 36%bd | 28% |
| Neither | 2% | 2%d | 1% | 2%d | 1% |
| Dissatisfied/Very Dissatisfied | 1% | 1% | <1% | 1% | <1% |
| Don't know/no answer | 3% | 3% | 3% | 4% | 3% |

Q33: How satisfied are you with your stay in Lee County?

**Satisfaction with Visit**

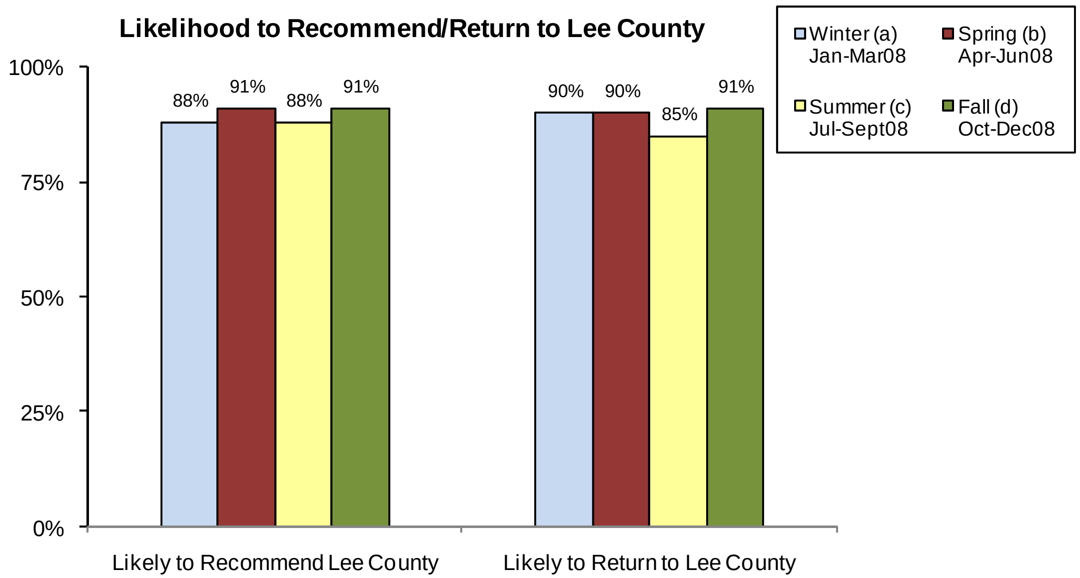


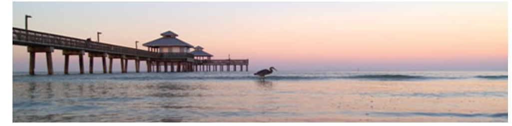


# Future Plans

| Likelihood to Recommend/Return to Lee County | | | | | |
|---|---|---|---|---|---|
| **Likelihood to Recommend/Return to Lee County** | **Annual** | **Winter (a) Jan-Mar08** | **Spring (b) Apr-Jun08** | **Summer (c) Jul-Sept08** | **Fall (d) Oct-Dec08** |
| Total Respondents | 2,444 | 624 | 600 | 608 | 612 |
| Likely to Recommend Lee County | 89% | 88% | 91% | 88% | 91% |
| Likely to Return to Lee County | 89% | 90%c | 90%c | 85% | 91%c |
| Base: Total Respondents Planning to Return | 2,178 | 562 | 538 | 519 | 559 |
| Likely to Return Next Year | 58% | 60%c | 55% | 52% | 65%bc |

Q32: Would you recommend Lee County to a friend over other vacation areas in Florida?
Q35: Will you come back to Lee County?
Q36: Will you come back next year?





# Visitor and Travel Party Demographic Profile

| Travel Party | | | | | |
|---|---|---|---|---|---|
| | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
| Total Respondents | 2,444 | 624 | 600 | 608 | 612 |
| Family | 39% | 29% | 46%ad | 48%ad | 31% |
| Couple | 37% | 48%bcd | 30% | 30% | 41%bc |
| Group of couples/friends | 12% | 10% | 13% | 11% | 15%a |
| Single | 7% | 7% | 5% | 6% | 9%bc |
| Other | 4% | 4% | 4% | 3% | 4% |
| | | | | | |
| Mean travel party size | 3.3 | 2.8 | 3.6ad | 3.6ad | 3.1a |
| Mean adults in travel party | 2.7 | 2.5 | 2.7a | 2.8a | 2.7a |

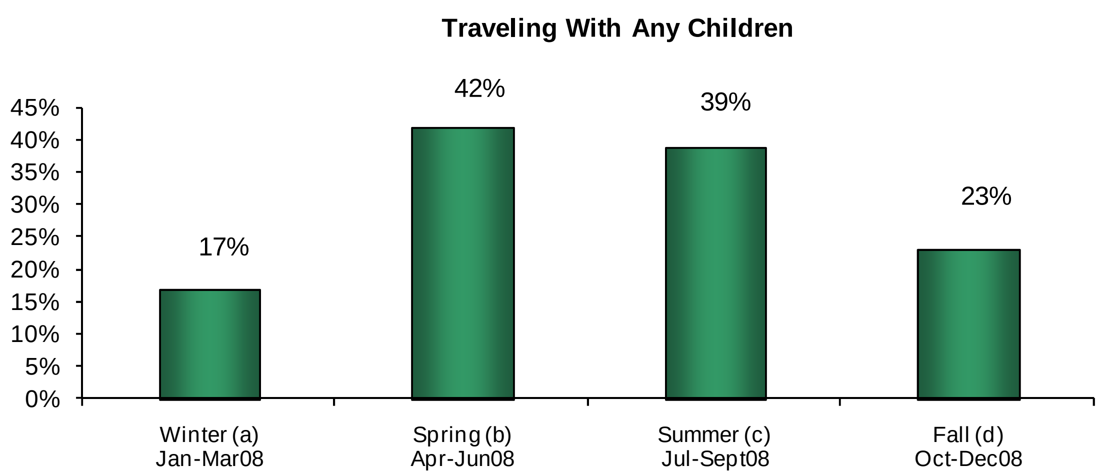
Q22: On this trip, are you traveling:
Q23: Including yourself, how many people are in your immediate travel party?

the beaches of FORT MYERS SANIBEL

# Visitor and Travel Party Demographic Profile

| Travel Parties with Children | | | | | |
|---|---|---|---|---|---|
| | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
| Total Respondents | 2,444 | 624 | 600 | 608 | 612 |
| Traveling with any children (net) | 30% | 17% | 42%ad | 39%ad | 23%a |
| Any younger than 6 | 14% | 8% | 17%a | 16%a | 14%a |
| Any 6 - 11 years old | 14% | 8% | 19%ad | 19%ad | 10% |
| Any 12 - 17 years old | 14% | 7% | 22%ad | 21%ad | 8% |

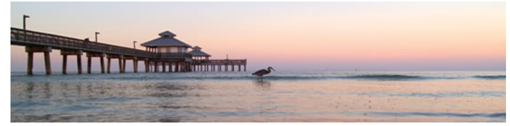
Q24: How many of those people are: Younger than 6 years old/6-11 years old/12-17 years old/Adults



# Visitor and Travel Party Demographic Profile

| Visitor Demographic Profile | | | | | |
|---|---|---|---|---|---|
| | **Annual** | **Winter (a) Jan-Mar08** | **Spring (b) Apr-Jun08** | **Summer (c) Jul-Sept08** | **Fall (d) Oct-Dec08** |
| Total Respondents | 2,444 | 624 | 600 | 608 | 612 |
| Vacations per year (mean) | 2.8 | 2.9b | 2.5 | 2.9 | 2.9b |
| Short getaways per year (mean) | 4.0 | 4.4c | 4.1c | 3.5 | 4.0c |
| Age of respondent (mean) | 47.6 | 51.4bcd | 45.91c | 44.3 | 48.8bc |
| Annual household income (mean) | $96,051 | $94,332 | $99,178 | $94,972 | $95,563 |
| | | | | | |
| **Marital Status** | | | | | |
| Married | 71% | 71% | 72% | 69% | 72% |
| Single | 16% | 15% | 16% | 18% | 14% |
| Other | 11% | 11% | 11% | 10% | 12% |
| | | | | | |
| **Gender of Respondent** | | | | | |
| Male | 29% | 28% | 26% | 31% | 31% |
| Female | 68% | 69% | 72%cd | 66% | 66% |

Q37: How many vacations, lasting FIVE (5) OR MORE NIGHTS AWAY FROM HOME, do you take in an average year?
Q38: And how many short getaway trips, lasting AT LEAST (1) BUT NOT MORE THAN FOUR (4) NIGHTS AWAY FROM HOME, do you take in an average year?
Q41: What is your age, please?
Q43: What is your total annual household income before taxes?
Q40: Are you: Married/Single/Other

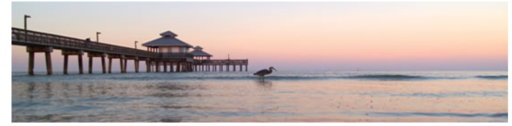


# Visitor Origin and Visitation Estimates

| Total Visitation | | | | | | |
|---|---|---|---|---|---|---|
| | | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
| Paid Accommodations | 43% | 2,065,760 | 529,663 | 613,596 | 453,905 | 468,596 |
| Friends/Relatives | 57% | 2,688,078 | 764,581 | 690,806 | 594,633 | 638,058 |
| *Total Visitation* | | *4,753,838* | *1,294,244* | *1,304,402* | *1,048,538* | *1,106,654* |
| **Visitor Origin** | | | | | | |
| **Visitors Staying in Paid Accommodations** | | | | | | |
| United States | 73% | 1,514,711 | 432,029 | 513,219 | 283,988 | 297,326 |
| Germany | 8% | 170,691 | 9,763 | 35,618 | 67,729 | 54,807 |
| UK | 6% | 129,026 | 14,645 | 21,047 | 47,529 | 43,845 |
| Canada | 6% | 116,930 | 51,258 | 22,666 | 13,071 | 27,403 |
| Scandinavia | 2% | 44,353 | 6,102 | 1,619 | 10,694 | 16,442 |
| Ireland | 1% | 28,224 | 3,661 | -- | 8,318 | 9,591 |
| BeNeLux | 1% | 26,880 | 2,441 | 3,238 | 14,259 | 5,481 |
| France | 1% | 14,784 | 1,220 | 4,857 | 4,753 | 2,740 |
| Switzerland | 1% | 14,784 | -- | 4,857 | 1,188 | 2,740 |
| Austria | <1% | 8,064 | 2,441 | -- | 1,188 | 2,740 |
| Other Europe | <1% | 9,408 | 1,220 | 3,238 | -- | 1,370 |
| Other/No Answer | 1% | 18,816 | 4,882 | 1,619 | 2,376 | 2,740 |

# Visitor Origin and Visitation Estimates

| Total Visitation | | | | | | |
|---|---|---|---|---|---|---|
| | % | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
| **U.S. Regions (Paid Accommodations)** | | | | | | |
| South (including Florida) | 23% | 352,133 | 40,274 | 134,376 | 122,388 | 58,917 |
| Midwest | 39% | 595,401 | 201,370 | 200,754 | 89,117 | 108,243 |
| Northeast | 18% | 268,804 | 107,397 | 71,235 | 33,271 | 56,177 |
| West | 2% | 36,289 | 7,323 | 17,809 | 3,565 | 8,221 |
| No Answer | 17% | 260,740 | 75,666 | 89,044 | 35,647 | 65,768 |
| **Top DMAs (Paid Accommodations)** | | | | | | |
| Indianapolis | 5% | 77,953 | 20,747 | 27,523 | 20,200 | 8,221 |
| Chicago | 5% | 73,921 | 21,968 | 19,428 | 15,447 | 17,812 |
| New York | 4% | 67,201 | 20,747 | 11,333 | 14,259 | 17,812 |
| Boston | 4% | 53,761 | 31,731 | 9,714 | 4,753 | 8,221 |
| Minneapolis-St. Paul | 3% | 40,321 | 21,968 | 8,095 | -- | 9,591 |
| Cleveland-Akron | 3% | 40,321 | 14,645 | 6,476 | 7,129 | 10,961 |
| Detroit | 3% | 38,977 | 15,865 | 14,571 | 2,376 | 6,851 |
| Tampa-Saint Petersburg | 2% | 36,289 | 4,882 | 8,095 | 13,071 | 9,591 |
| Philadelphia | 2% | 34,945 | 9,763 | 9,714 | 10,694 | 5,481 |
| Miami | 2% | 34,945 | -- | 14,571 | 16,635 | 4,110 |
| Orlando | 2% | 34,945 | -- | 9,714 | 17,823 | 6,851 |
| Saint Louis | 2% | 33,601 | 8,543 | 16,190 | 7,129 | 2,740 |
| | | | | | | |
| Florida residents | 9% | 142,466 | 6,102 | 46,951 | 64,165 | 23,293 |



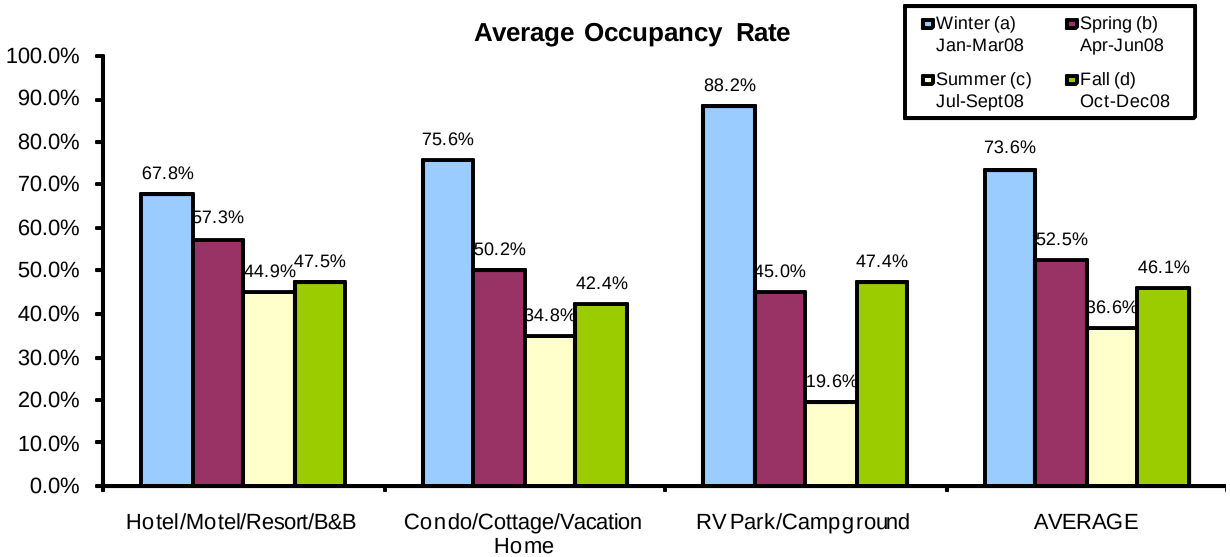
# Occupancy Data Analysis
# January – December 2008

*Property managers were interviewed each month during the period from January to December 2008 to provide data for that specific month. Results shown on the following pages are a combination of the samples interviewed in each of the twelve months. Therefore, base sizes shown do not reflect total number of properties but rather total number of completed interviews, as most properties participated during multiple months.*

# Occupancy

| Average Occupancy Rate | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
|---|---|---|---|---|---|
| Total Property Managers Responding | 1,674 | 397 | 442 | 408 | 426 |
| | Average Occupancy - % | | | | |
| Hotel/Motel/Resort/B&B | 54.2% | 67.8%bcd | 57.3%cd | 44.9% | 47.5% |
| Condo/Cottage/Vacation Home | 50.6% | 75.6%bcd | 50.2%cd | 34.8% | 42.4%c |
| RV Park/Campground | 46.7% | 88.2%bcd | 45.0%c | 19.6% | 47.4%c |
| AVERAGE | 51.6% | 73.6%bcd | 52.5%c | 36.6% | 46.1%c |

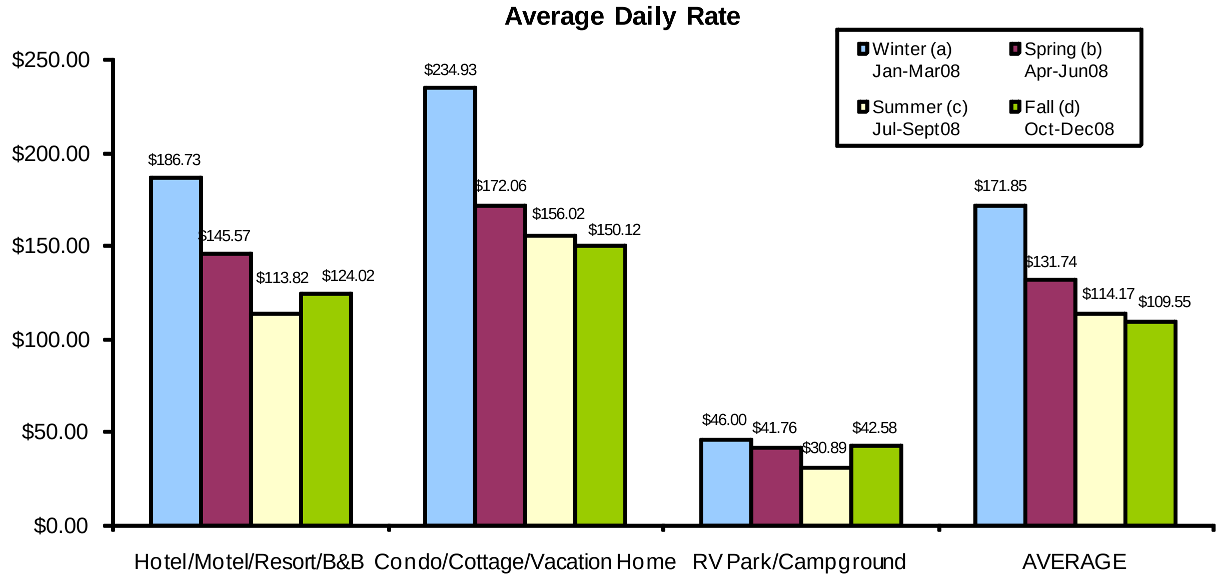
Q18: What was your overall average occupancy rate for the season?
Q19: What was your average daily rate (ADR) in this season?



# Daily Rates

| Average Daily Rate | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
|---|---|---|---|---|---|
| Total Property Managers Responding | 1,664 | 395 | 437 | 409 | 423 |
| | Average Daily Rate - $ | | | | |
| Hotel/Motel/Resort/B&B | $146.57 | $186.73 | $145.57 | $113.82 | $124.02 |
| Condo/Cottage/Vacation Home | $187.44 | $234.93 | $172.06 | $156.02 | $150.12 |
| RV Park/Campground | $42.23 | $46.00 | $41.76 | $30.89 | $42.58 |
| AVERAGE | $136.50 | $171.85 | $131.74 | $114.17 | $109.55 |

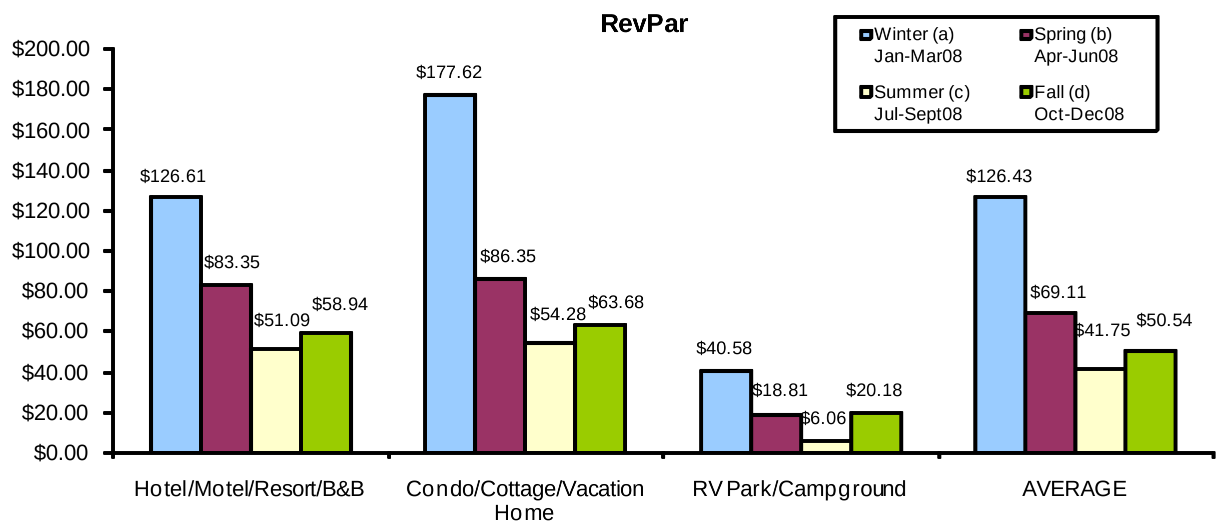
Q18: What was your overall average occupancy rate for the season?
Q19: What was your average daily rate (ADR) in this season?



# RevPAR

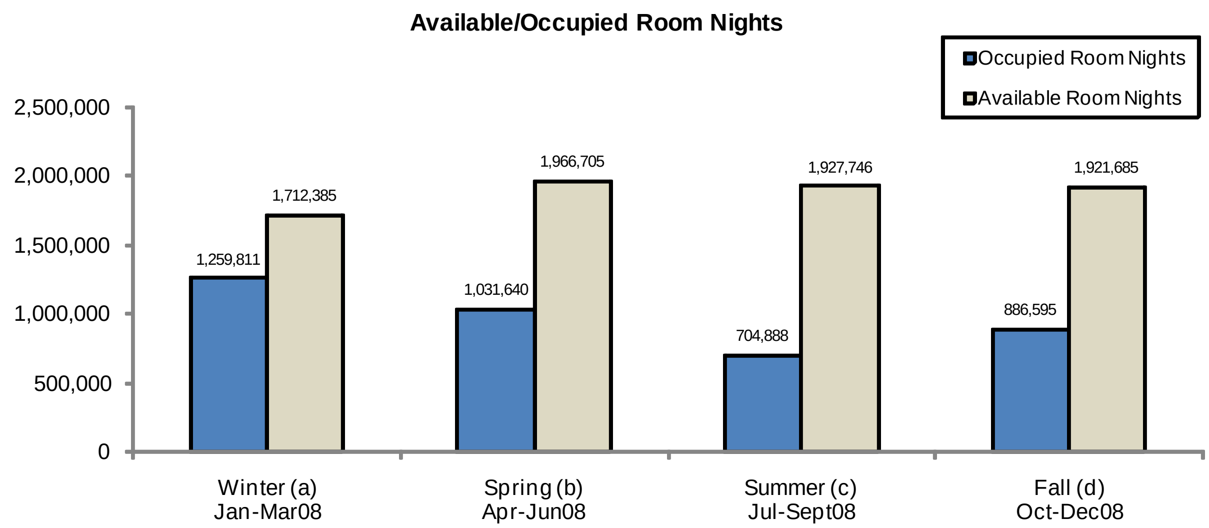
| RevPAR | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
|---|---|---|---|---|---|
| Total Property Managers Responding | 1,674/1,664 | 397/395 | 442/437 | 408/409 | 426/423 |
| | RevPAR - $ | | | | |
| Hotel/Motel/Resort/B&B | $79.45 | $126.61 | $83.35 | $51.09 | $58.94 |
| Condo/Cottage/Vacation Home | $94.88 | $177.62 | $86.35 | $54.28 | $63.68 |
| RV Park/Campground | $19.73 | $40.58 | $18.81 | $6.06 | $20.18 |
| AVERAGE | $70.40 | $126.43 | $69.11 | $41.75 | $50.54 |

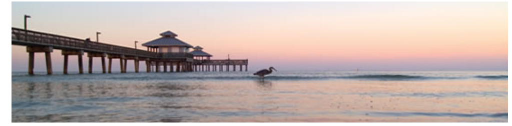
Q18: What was your overall average occupancy rate for the season?
Q19: What was your average daily rate (ADR) in this season?



# Room/Unit/Site Nights

| | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
|---|---|---|---|---|---|
| **Occupied Room Nights** | | | | | |
| Hotel/Motel/Resort/B&B | 2,069,479 | 626,526 | 552,775 | 445,962 | 444,216 |
| Condo/Cottage/Vacation Home | 1,033,813 | 372,457 | 272,056 | 173,571 | 215,729 |
| RV Park/Campground | 779,642 | 260,828 | 206,809 | 85,355 | 226,650 |
| **Total** | **3,882,934** | **1,259,811** | **1,031,640** | **704,888** | **886,595** |
| | | | | | |
| **Available Room Nights** | | | | | |
| Hotel/Motel/Resort/B&B | 3,817,698 | 924,058 | 965,338 | 993,533 | 934,769 |
| Condo/Cottage/Vacation Home | 2,042,258 | 492,616 | 542,127 | 498,917 | 508,598 |
| RV Park/Campground | 1,668,565 | 295,711 | 459,240 | 435,296 | 478,318 |
| **Total** | **7,528,521** | **1,712,385** | **1,966,705** | **1,927,746** | **1,921,685** |



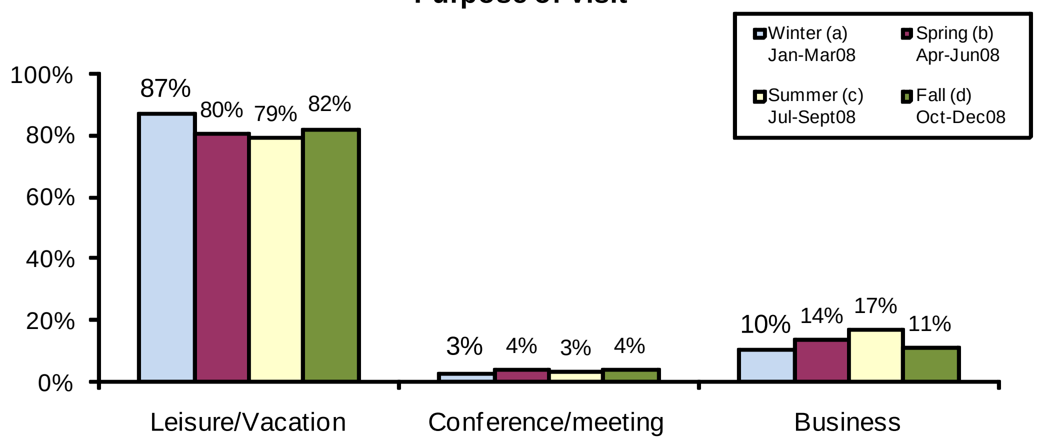


# Lodging Management Estimates

| Guest Profile | | | | | |
|---|---|---|---|---|---|
| | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
| Total Property Managers Responding | 1,459 | 365 | 395 | 342 | 357 |
| Purpose of Visit | | | | | |
| Leisure/Vacation | 82% | 87%bcd | 80% | 79% | 82% |
| Conference/meeting | 4% | 3% | 4% | 3% | 4% |
| Business | 13% | 10% | 14% | 17%ad | 11% |
| Total Property Managers Responding | 1,588 | 375 | 419 | 392 | 402 |
| Average guests per room | 2.5 | 2.6c | 2.6c | 2.4 | 2.5 |
| Total Property Managers Responding | 1,570 | 371 | 414 | 387 | 398 |
| Average length of stay in nights | 7.3 | 9.9bcd | 6.5 | 5.9 | 7.0c |

Q23: What percent of your room/site/unit occupancy was generated by:
Q18: What was your average number of guests per room/site/unit?
Q19: What was the average length of stay (in nights) of your guests?

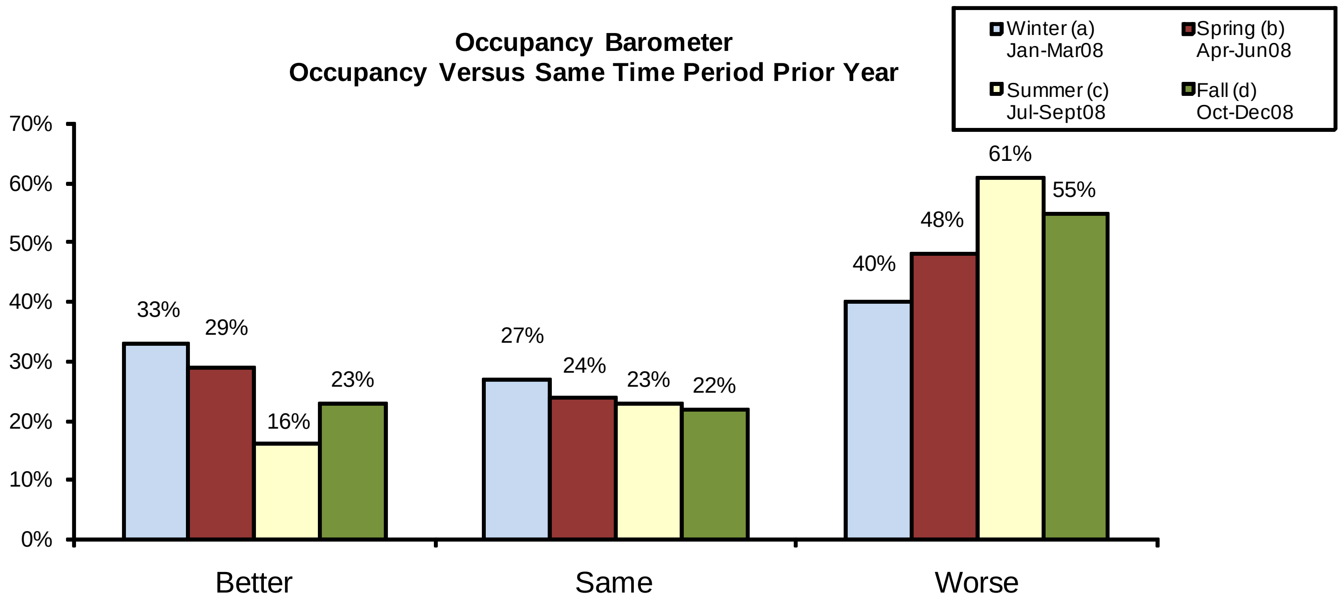
**Purpose of Visit**



# Occupancy Barometer

| Occupancy | | | | | |
|---|---|---|---|---|---|
| | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
| Total Property Managers Responding | 1,632 | 384 | 423 | 407 | 418 |
| Better | 25% | 33%cd | 29%c | 16% | 23%c |
| Same | 24% | 27% | 24% | 23% | 22% |
| Worse | 51% | 40% | 48%a | 61%ab | 55%ab |

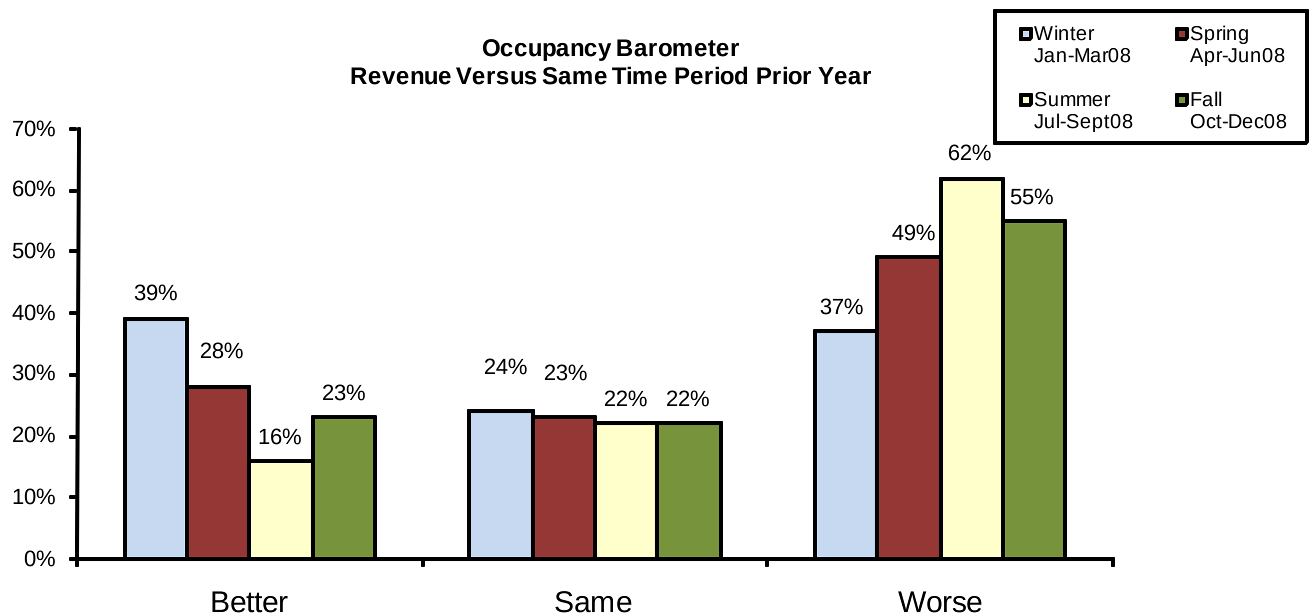
Q25: Was your [month] occupancy better, the same, or worse than it was in [same month] of last year?
How about your property's [month] revenue – better, the same, or worse than [same month] of last year?



# Occupancy Barometer

| Revenue | | | | | |
|---|---|---|---|---|---|
| | Annual | Winter Jan-Mar08 | Spring Apr-Jun08 | Summer Jul-Sept08 | Fall Oct-Dec08 |
| Total Property Managers Responding | 1,587 | 375 | 408 | 399 | 405 |
| Better | 26% | 39%bcd | 28%c | 16% | 23%c |
| Same | 23% | 24% | 23% | 22% | 22% |
| Worse | 51% | 37% | 49%a | 62%ab | 55%a |

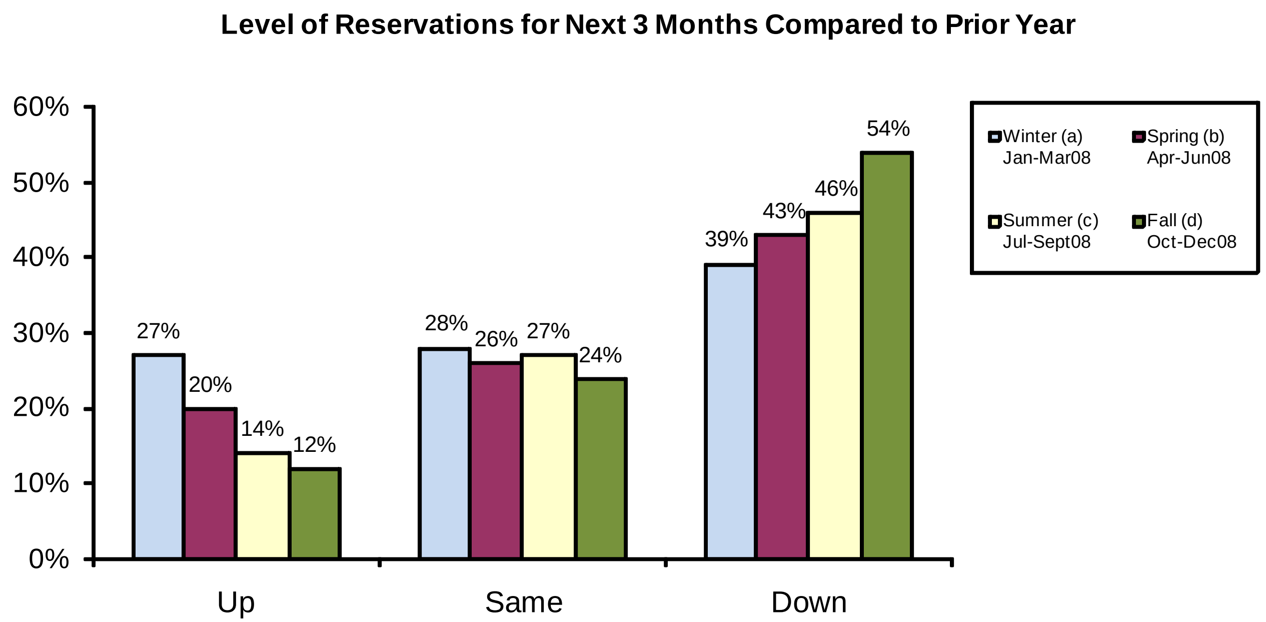
Q25: Was your [month] occupancy better, the same, or worse than it was in [same month] of last year?
How about your property's [month] revenue – better, the same, or worse than [same month] of last year?



# Occupancy Barometer

| Level of Reservations for Next 3 Months Compared to Prior Year | | | | | |
|---|---|---|---|---|---|
| | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
| Total Property Managers Responding | 1,611 | 379 | 421 | 401 | 410 |
| Up | 18% | 27%bcd | 20%cd | 14% | 12% |
| Same | 26% | 28% | 26% | 27% | 24% |
| Down | 46% | 39% | 43% | 46%a | 54%abc |

Q26: Compared to the same time period of last year, is your property's total level of reservations up, the same, or down for the next three months?

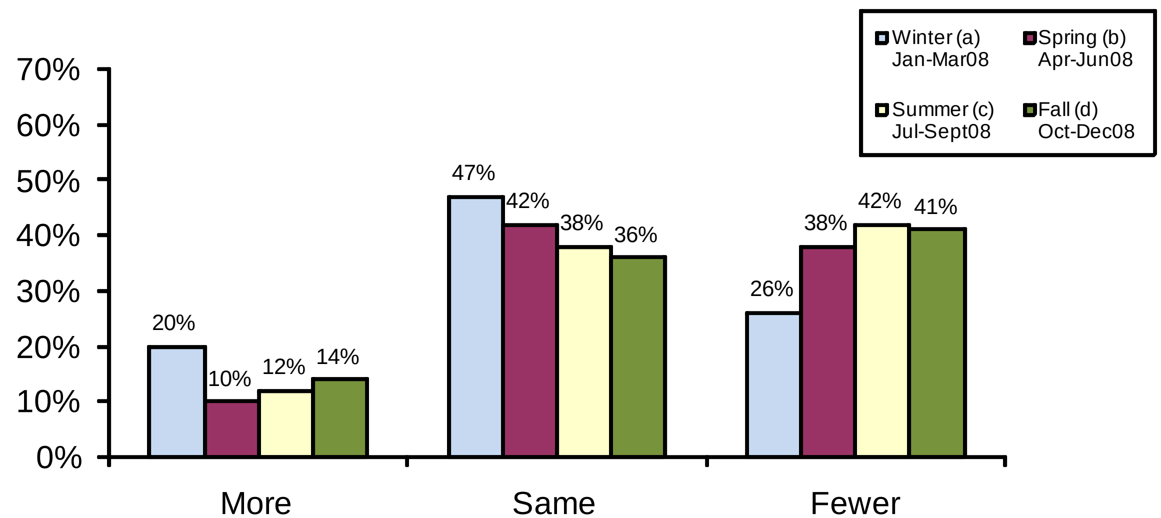


## Occupancy Barometer

| Origin of Guests for Next 3 Months Compared to Last Year | | | | | |
|---|---|---|---|---|---|
| U.S. out-of-state | | | | | |
| | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
| Total Property Managers Responding: | 1,414 | 332 | 372 | 348 | 362 |
| More | 14% | 20%bcd | 10% | 12% | 14% |
| Same | 41% | 47%cd | 42% | 38% | 36% |
| Fewer | 37% | 26% | 38%a | 42%a | 41%a |
| Not Applicable | 9% | 8% | 10% | 8% | 10% |

Q27: Now thinking about the specific origins of your guests, for the next three months, do you expect more, the same, or fewer guests from each of the following areas than you had at the same time last year?

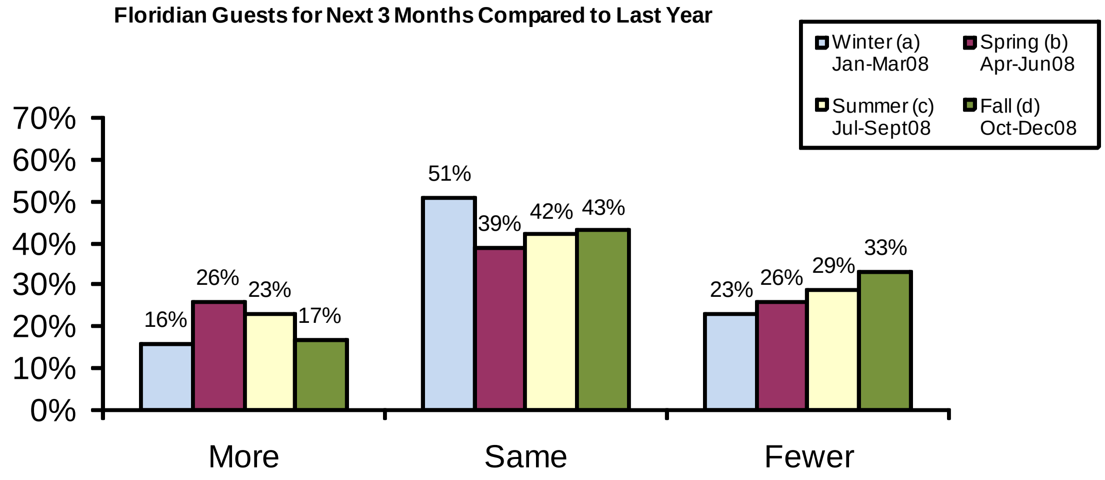
**U.S. Out-of-State Guests for Next 3 Months Compared to Last Year**



# Occupancy Barometer

| Origin of Guests for Next 3 Months Compared to Last Year | | | | | |
|---|---|---|---|---|---|
| Floridians | | | | | |
| | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
| Total Property Managers Responding: | 1,423 | 326 | 379 | 359 | 359 |
| More | 21% | 16% | 26%ad | 23%a | 17% |
| Same | 43% | 51%bcd | 39% | 42% | 43% |
| Fewer | 28% | 23% | 26% | 29% | 33%a |
| Not Applicable | 8% | 10% | 9% | 7% | 7% |

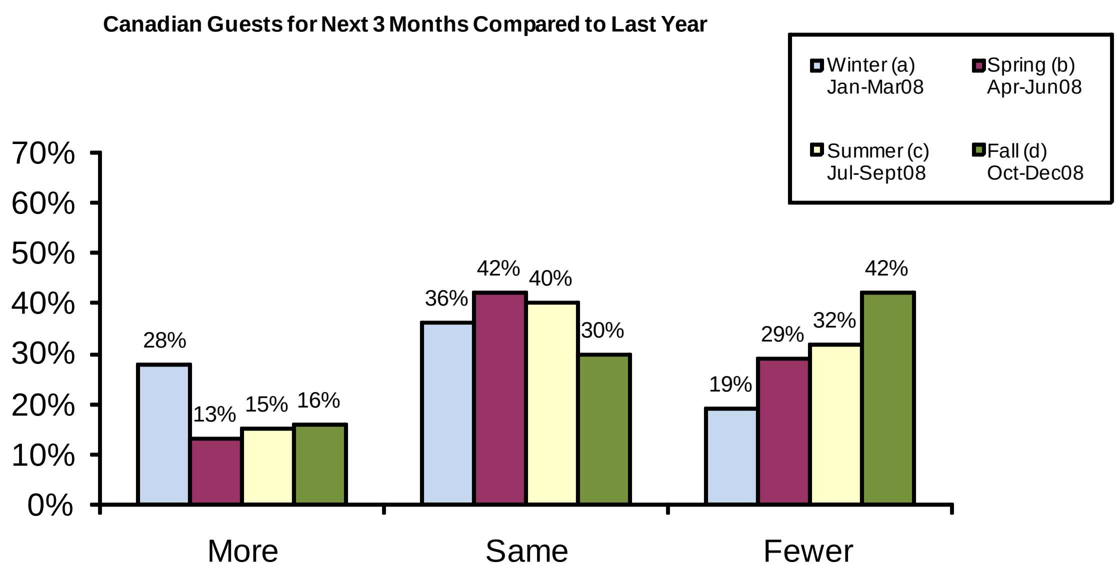
Q27: Now thinking about the specific origins of your guests, for the next three months, do you expect more, the same, or fewer guests from each of the following areas than you had at the same time last year?

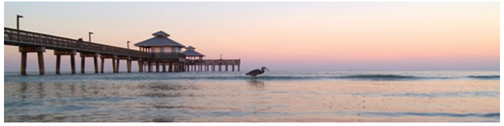


## Occupancy Barometer

| Origin of Guests for Next 3 Months Compared to Last Year | | | | | |
|---|---|---|---|---|---|
| Canadians | | | | | |
| | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
| Total Property Managers Responding: | 1,289 | 318 | 339 | 287 | 345 |
| More | 18% | 28%bcd | 13% | 15% | 16% |
| Same | 36% | 36% | 42%d | 40%d | 30% |
| Fewer | 31% | 19% | 29%a | 32%a | 42%abc |
| Not Applicable | 15% | 18%d | 16% | 13% | 12% |

Q27: Now thinking about the specific origins of your guests, for the next three months, do you expect more, the same, or fewer guests from each of the following areas than you had at the same time last year?

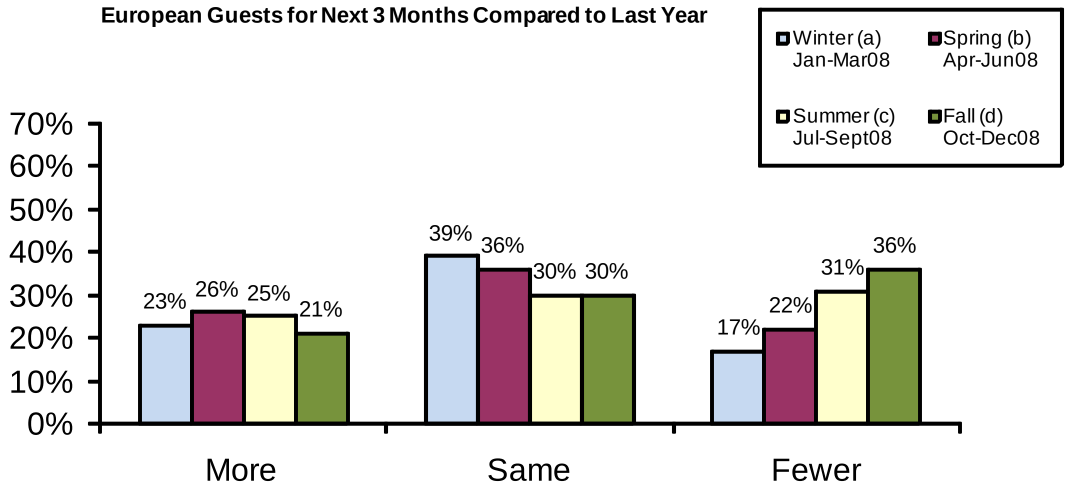


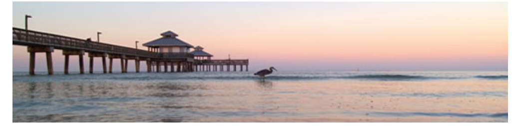


# Occupancy Barometer

| Origin of Guests for Next 3 Months Compared to Last Year | | | | | |
|---|---|---|---|---|---|
| Europeans | | | | | |
| | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
| Total Property Managers Responding: | 1,258 | 311 | 334 | 275 | 338 |
| More | 23% | 23% | 26% | 25% | 21% |
| Same | 34% | 39%cd | 36% | 30% | 30% |
| Fewer | 26% | 17% | 22% | 31%ab | 36%ab |
| Not Applicable | 17% | 22%cd | 16% | 15% | 14% |

Q27: Now thinking about the specific origins of your guests, for the next three months, do you expect more, the same, or fewer guests from each of the following areas than you had at the same time last year?

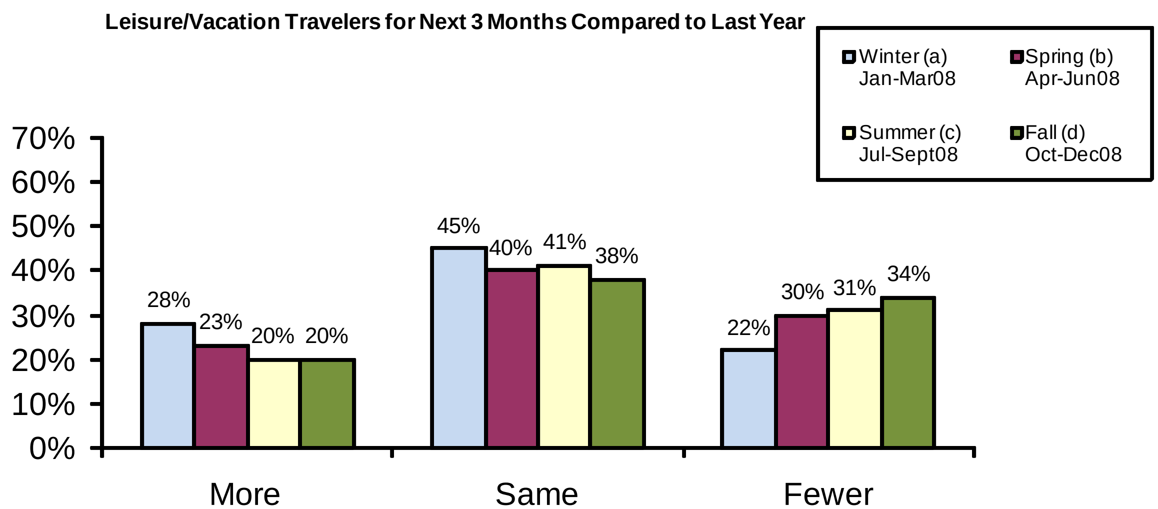




# Occupancy Barometer

| Type of Travelers for Next 3 Months Compared to Last Year | | | | | |
|---|---|---|---|---|---|
| Leisure/Vacation | | | | | |
| | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
| Total Property Managers Responding: | 1,436 | 348 | 386 | 348 | 354 |
| More | 23% | 28%cd | 23% | 20% | 20% |
| Same | 41% | 45% | 40% | 41% | 38% |
| Fewer | 29% | 22% | 30%a | 31%a | 34%a |
| Not Applicable | 7% | 6% | 7% | 7% | 8% |

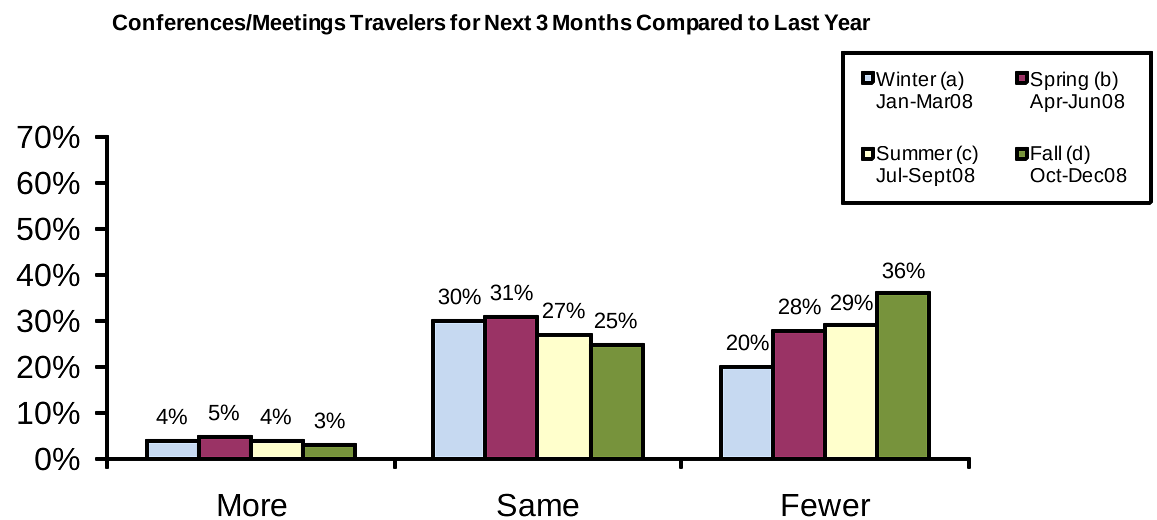
Q28: Compared to the same three months last year, will the following types of travelers generate more, the same, or less business for your property in the next three months?



# Occupancy Barometer

| Type of Travelers for Next 3 Months Compared to Last Year | | | | | |
|---|---|---|---|---|---|
| Conferences/Meetings | | | | | |
| | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
| Total Property Managers Responding: | 1,120 | 299 | 311 | 251 | 259 |
| More | 4% | 4% | 5% | 4% | 3% |
| Same | 28% | 30% | 31% | 27% | 25% |
| Fewer | 28% | 20% | 28%a | 29%a | 36%ab |
| Not Applicable | 40% | 45%bd | 37% | 41% | 36% |

Q28: Compared to the same three months last year, will the following types of travelers generate more, the same, or less business for your property in the next three months?



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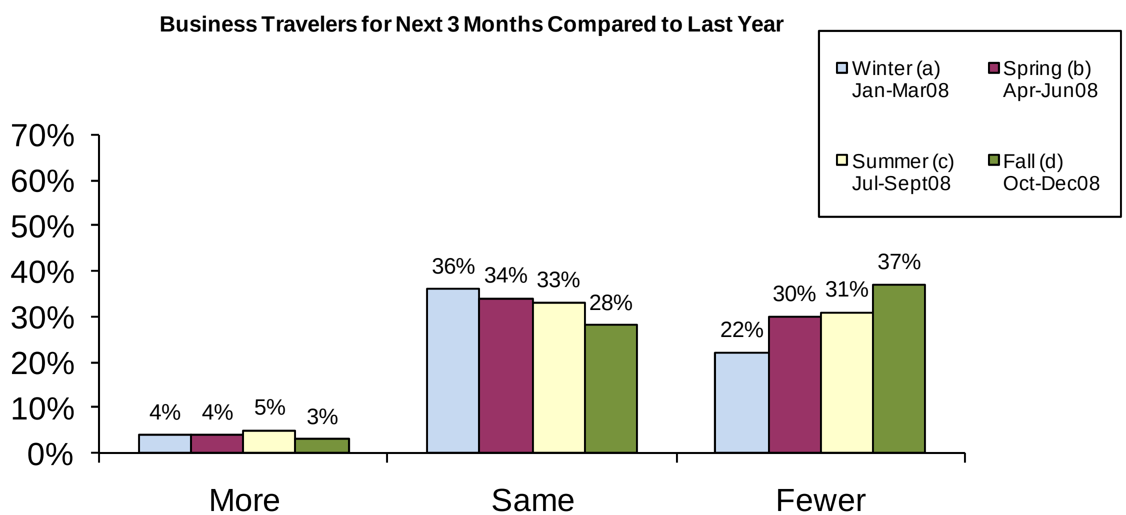
# Occupancy Barometer

| Type of Travelers for Next 3 Months Compared to Last Year | | | | | |
|---|---|---|---|---|---|
| Business | | | | | |
| | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
| Total Property Managers Responding: | 1,151 | 300 | 328 | 263 | 260 |
| More | 4% | 4% | 4% | 5% | 3% |
| Same | 33% | 36% | 34% | 33% | 28% |
| Fewer | 30% | 22% | 30%a | 31%a | 37%a |
| Not Applicable | 33% | 39%c | 32% | 31% | 32% |

Q28: Compared to the same three months last year, will the following types of travelers generate more, the same, or less business for your property in the next three months?



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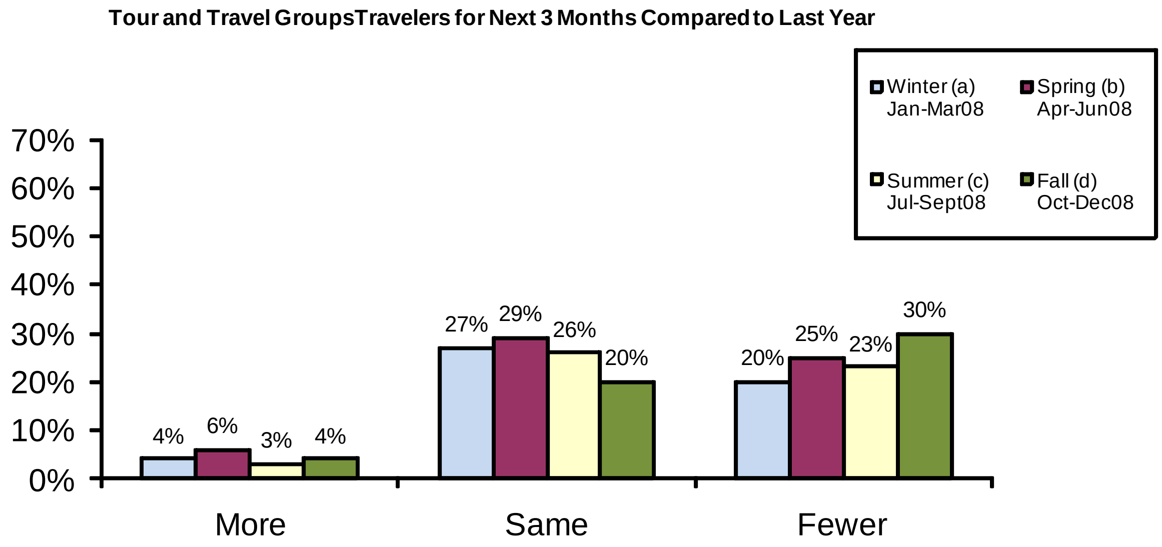
# Occupancy Barometer

| Type of Travelers for Next 3 Months Compared to Last Year | | | | | |
|---|---|---|---|---|---|
| Tour and Travel Groups | | | | | |
| | Annual | Winter (a) Jan-Mar08 | Spring (b) Apr-Jun08 | Summer (c) Jul-Sept08 | Fall (d) Oct-Dec08 |
| Total Property Managers Responding: | 1,078 | 290 | 302 | 236 | 250 |
| More | 5% | 4% | 6% | 3% | 4% |
| Same | 26% | 27%d | 29%d | 26% | 20% |
| Fewer | 24% | 20% | 25% | 23% | 30%a |
| Not Applicable | 46% | 49%b | 40% | 47% | 46% |

Q28: Compared to the same three months last year, will the following types of travelers generate more, the same, or less business for your property in the next three months?



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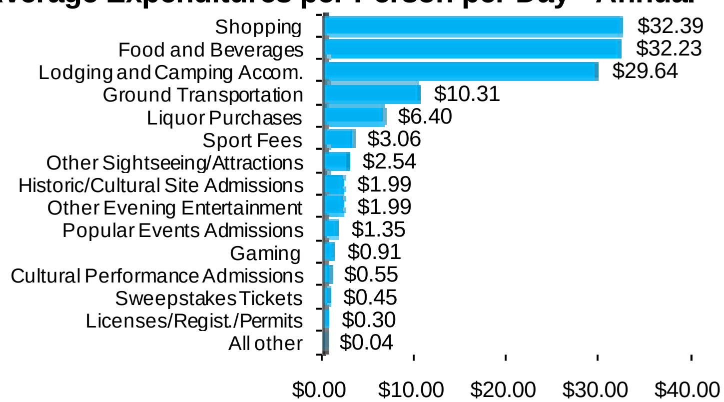
# Economic Impact Analysis
# January - December 2008

# Average Expenditures

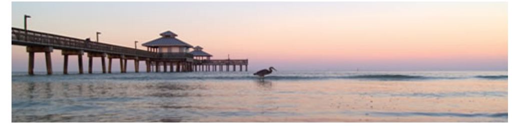
| Average Expenditures per Person per Day | | | | | |
|---|---|---|---|---|---|
| | Annual | Winter Jan-Mar08 | Spring Apr-Jun08 | Summer Jul-Sept08 | Fall Oct-Dec08 |
| TOTAL | $124.17 | $139.30 | $127.74 | $113.66 | $117.49 |
| Shopping | $32.39 | $32.15 | $30.30 | $29.84 | $33.65 |
| Food and Beverages | $32.23 | $34.29 | $31.60 | $30.04 | $32.23 |
| Lodging and Camping Accom. | $29.64 | $38.72 | $36.43 | $24.89 | $21.40 |
| Ground Transportation | $10.31 | $13.21 | $10.38 | $10.13 | $10.46 |
| Liquor Purchases | $6.40 | $6.01 | $5.96 | $6.03 | $6.65 |
| Sport Fees | $3.06 | $3.18 | $3.09 | $3.11 | $2.90 |
| Other Sightseeing/Attractions | $2.54 | $3.03 | $2.34 | $2.57 | $2.64 |
| Historic/Cultural Site Admissions | $1.99 | $2.57 | $1.87 | $1.96 | $2.29 |
| Other Evening Entertainment | $1.99 | $1.91 | $1.86 | $2.00 | $2.14 |
| Popular Events Admissions | $1.35 | $1.84 | $1.51 | $1.06 | $1.12 |
| Gaming | $0.91 | $1.09 | $1.15 | $0.83 | $0.63 |
| Cultural Performance Admissions | $0.55 | $0.69 | $0.55 | $0.46 | $0.49 |
| Sweepstakes Tickets | $0.45 | $0.33 | $0.39 | $0.37 | $0.49 |
| Licenses/Regist./Permits | $0.30 | $0.21 | $0.28 | $0.33 | $0.33 |
| All other | $0.04 | $0.05 | $0.03 | $0.05 | $0.06 |

## Average Expenditures per Person per Day - Annual



# Total Visitor Expenditures by Spending Category

| TOTAL EXPENDITURES | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Annual | | Winter Jan-Mar08 | | Spring Apr-Jun08 | | Summer Jul-Sept08 | | Fall Oct-Dec08 | |
| TOTAL | $2,908,742,738 | 100% | $984,260,857 | 100% | $678,935,961 | 100% | $523,649,638 | 100% | $721,896,282 | 100% |
| Shopping | $810,825,026 | 28% | $250,454,219 | 25% | $183,470,196 | 27% | $148,696,812 | 28% | $228,203,799 | 32% |
| Food and Beverages | $789,167,281 | 27% | $258,554,048 | 26% | $185,141,086 | 27% | $143,769,697 | 27% | $201,702,450 | 28% |
| Lodging Accommodations | $530,012,895 | 18% | $216,492,560 | 22% | $135,912,759 | 20% | $80,478,424 | 15% | $97,129,152 | 13% |
| Ground Transportation | $276,765,916 | 10% | $93,141,975 | 9% | $62,208,238 | 9% | $53,629,559 | 10% | $67,786,144 | 9% |
| Liquor Purchases | $155,436,570 | 5% | $48,290,927 | 5% | $33,995,105 | 5% | $28,684,724 | 5% | $44,465,814 | 6% |
| Sport Fees | $58,202,617 | 2% | $19,860,633 | 2% | $12,363,070 | 2% | $10,497,651 | 2% | $15,481,263 | 2% |
| Historic/Cultural Site Admissions | $66,731,571 | 2% | $22,774,836 | 2% | $13,771,098 | 2% | $14,891,657 | 3% | $15,293,980 | 2% |
| Other Sightseeing/Attractions | $60,931,332 | 2% | $21,003,670 | 2% | $12,922,240 | 2% | $10,291,403 | 2% | $16,714,019 | 2% |
| Other Evening Entertainment | $61,059,086 | 2% | $19,588,040 | 2% | $12,582,036 | 2% | $13,206,460 | 3% | $15,682,550 | 2% |
| Popular Events Admissions | $47,491,351 | 2% | $16,711,589 | 2% | $14,567,106 | 2% | $8,576,509 | 2% | $7,636,147 | 1% |
| Gaming | $23,171,483 | 1% | $7,544,395 | 1% | $5,965,546 | 1% | $5,290,127 | 1% | $4,371,415 | 1% |
| All Other | $28,947,610 | 1% | $9,843,965 | 1% | $6,037,481 | 1% | $5,636,615 | 1% | $7,429,549 | 1% |

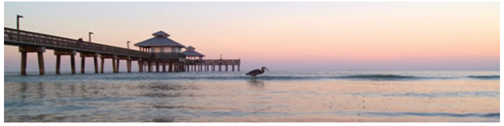


# Total Visitor Expenditures by Spending Category

| STAYING IN PAID ACCOMMODATIONS | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Annual | | Winter Jan-Mar08 | | Spring Apr-Jun08 | | Summer Jul-Sept08 | | Fall Oct-Dec08 | |
| TOTAL | $1,686,431,443 | 100% | $637,437,111 | 100% | $401,835,039 | 100% | $277,270,224 | 100% | $401,250,140 | 100% |
| Shopping | $399,535,257 | 24% | $133,887,483 | 21% | $85,277,211 | 21% | $66,042,293 | 24% | $114,328,270 | 28% |
| Food and Beverages | $388,613,422 | 23% | $142,456,610 | 22% | $88,275,106 | 22% | $64,280,678 | 23% | $93,601,028 | 23% |
| Lodging Accommodations | $530,012,895 | 31% | $216,492,560 | 34% | $135,912,759 | 34% | $80,478,424 | 29% | $97,129,152 | 24% |
| Ground Transportation | $150,389,634 | 9% | $59,252,112 | 9% | $35,086,667 | 9% | $21,039,999 | 8% | $35,010,856 | 9% |
| Liquor Purchases | $73,662,352 | 4% | $23,669,181 | 4% | $17,149,509 | 4% | $13,020,578 | 5% | $19,823,084 | 5% |
| Sport Fees | $39,897,621 | 2% | $13,687,629 | 2% | $8,957,334 | 2% | $8,245,755 | 3% | $9,006,903 | 2% |
| Historic/Cultural Site Admissions | $28,009,087 | 2% | $10,277,361 | 2% | $5,220,027 | 1% | $3,522,407 | 1% | $8,989,292 | 2% |
| Other Sightseeing/Attractions | $34,518,727 | 2% | $12,271,519 | 2% | $7,161,047 | 2% | $6,193,033 | 2% | $8,893,128 | 2% |
| Other Evening Entertainment | $24,943,640 | 1% | $8,124,062 | 1% | $6,031,225 | 2% | $4,913,828 | 2% | $5,874,525 | 1% |
| Popular Events Admissions | $16,886,211 | 1% | $6,814,262 | 1% | $4,244,667 | 1% | $2,441,175 | 1% | $3,386,107 | 1% |
| Gaming | $23,171,483 | 1% | $5,636,581 | 1% | $4,669,243 | 1% | $3,939,261 | 1% | $1,505,803 | 0% |
| All Other | $15,572,780 | 1% | $4,867,751 | 1% | $3,850,244 | 1% | $3,152,793 | 1% | $3,701,992 | 1% |

# Total Visitor Expenditures by Spending Category

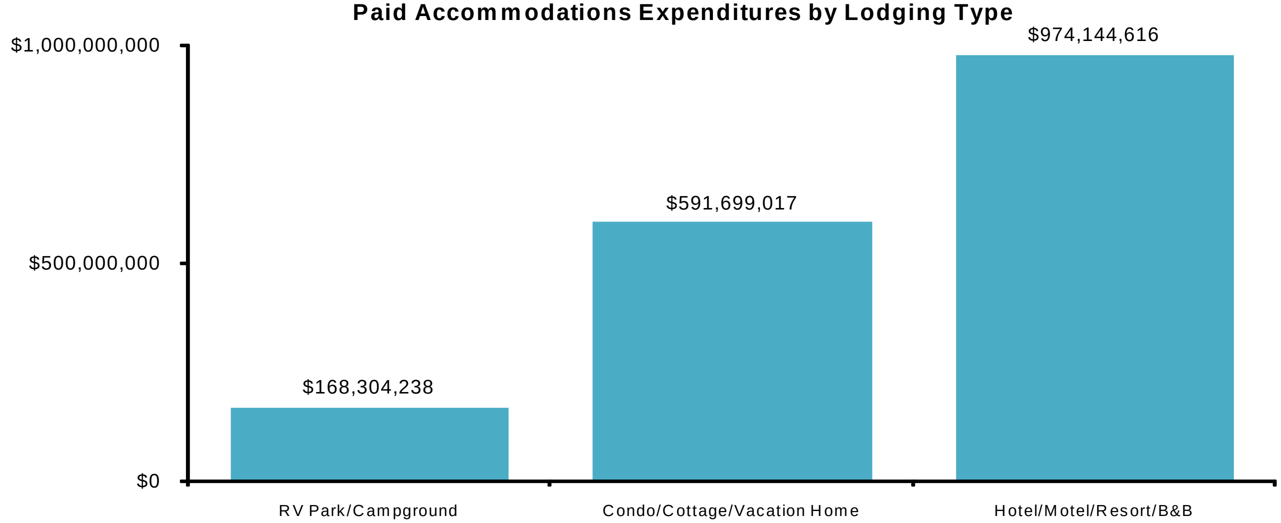
| VISITING FRIENDS AND RELATIVES / DAY TRIPPERS | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Annual | | Winter Jan-Mar08 | | Spring Apr-Jun08 | | Summer Jul-Sept08 | | Fall Oct-Dec08 | |
| TOTAL | $1,174,594,867 | 100% | $346,823,746 | 100% | $277,100,922 | 100% | $246,379,414 | 100% | $320,646,142 | 100% |
| Shopping | $411,289,769 | 35% | $116,566,736 | 34% | $98,192,985 | 35% | $82,654,519 | 34% | $113,875,529 | 36% |
| Food and Beverages | $400,553,859 | 34% | $116,097,438 | 33% | $96,865,980 | 35% | $79,489,019 | 32% | $108,101,422 | 34% |
| Lodging Accommodations | $0 | 0% | $0 | 0% | $0 | 0% | $0 | 0% | $0 | 0% |
| Ground Transportation | $126,376,282 | 11% | $33,889,863 | 10% | $27,121,571 | 10% | $32,589,560 | 13% | $32,775,288 | 10% |
| Liquor Purchases | $81,774,218 | 7% | $24,621,746 | 7% | $16,845,596 | 6% | $15,664,146 | 6% | $24,642,730 | 8% |
| Sport Fees | $18,304,996 | 2% | $6,173,004 | 2% | $3,405,736 | 1% | $2,251,896 | 1% | $6,474,360 | 2% |
| Historic/Cultural Site Admissions | $38,722,484 | 3% | $12,497,475 | 4% | $8,551,071 | 3% | $11,369,250 | 5% | $6,304,688 | 2% |
| Other Sightseeing/Attractions | $26,412,605 | 2% | $8,732,151 | 3% | $5,761,193 | 2% | $4,098,370 | 2% | $7,820,891 | 2% |
| Other Evening Entertainment | $36,115,446 | 3% | $11,463,978 | 3% | $6,550,811 | 2% | $8,292,632 | 3% | $9,808,025 | 3% |
| Popular Events Admissions | $30,605,140 | 3% | $9,897,327 | 3% | $10,322,439 | 4% | $6,135,334 | 2% | $4,250,040 | 1% |
| Gaming | $7,420,595 | 1% | $1,907,814 | 1% | $1,296,303 | 0% | $1,350,866 | 1% | $2,865,612 | 1% |
| All Other | $13,374,830 | 1% | $4,976,214 | 1% | $2,187,237 | 1% | $2,483,822 | 1% | $3,727,557 | 1% |



# Total Visitor Expenditures by Lodging Type

| Total Expenditures by Lodging Type | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Annual | | Winter Jan-Mar08 | | Spring Apr-Jun08 | | Summer Jul-Sept08 | | Fall Oct-Dec08 | |
| TOTAL | $2,908,742,738 | 100% | $984,260,857 | 100% | $678,935,961 | 100% | $523,649,638 | 100% | $721,896,282 | 100% |
| Visiting Friends & Relatives / Day Trippers | $1,174,594,867 | 40% | $346,823,746 | 35% | $277,100,922 | 41% | $246,379,414 | 47% | $320,646,142 | 44% |
| Paid Accommodations | $1,686,431,443 | 58% | $637,437,111 | 65% | $401,835,039 | 59% | $277,270,224 | 53% | $401,250,140 | 56% |
| *Hotel/Motel/Resort/B&B* | *$974,144,616* | *33%* | *$330,439,040* | *34%* | *$222,603,713* | *33%* | *$171,094,432* | *33%* | *$215,723,616* | *30%* |
| *Condo/Cottage/Vacation Home* | *$591,699,017* | *20%* | *$238,480,250* | *24%* | *$131,471,426* | *19%* | *$90,935,654* | *17%* | *$128,509,355* | *18%* |
| *RV Park/Campground* | *$168,304,238* | *6%* | *$68,517,821* | *7%* | *$47,759,900* | *7%* | *$15,240,138* | *3%* | *$57,017,169* | *8%* |

**Paid Accommodations Expenditures by Lodging Type**



# Direct and Indirect Impact of Visitor Expenditures

Estimated total visitor expenditures (detailed in 16 expense categories) are entered into an input/output model designed specifically for Lee County. This model classifies the visitor expenditure dollars by industry and identifies how the dollars move through the County economy. This Regional Input-Output Model is based on an economic model designed by the Federal Government, but it is modified using County Business Patterns to reflect how the economy of Lee County actually works.

*In the text and figures which follow to describe the impact of visitor expenditures on Lee County, both direct and total impacts are mentioned.*

## DIRECT IMPACTS

Economic benefits due directly to visitor expenditures.

For example, when visitor expenditures pay the salary and benefits for a hotel desk clerk, that amount would be considered in the direct impact for both jobs and income.

## TOTAL IMPACTS

Total impacts are the sum of direct and indirect impacts.

Indirect impacts are the additional economic benefits supported during additional rounds of spending.

For example, the front desk clerk pays income tax and property tax which are an indirect result of visitor expenditures. The front desk clerk also pays his/her utility bills, buys food for his/her family, shops for gifts, etc. Those dollars create the indirect impact of the initial traveler expenditures through many additional rounds of spending in the economy.

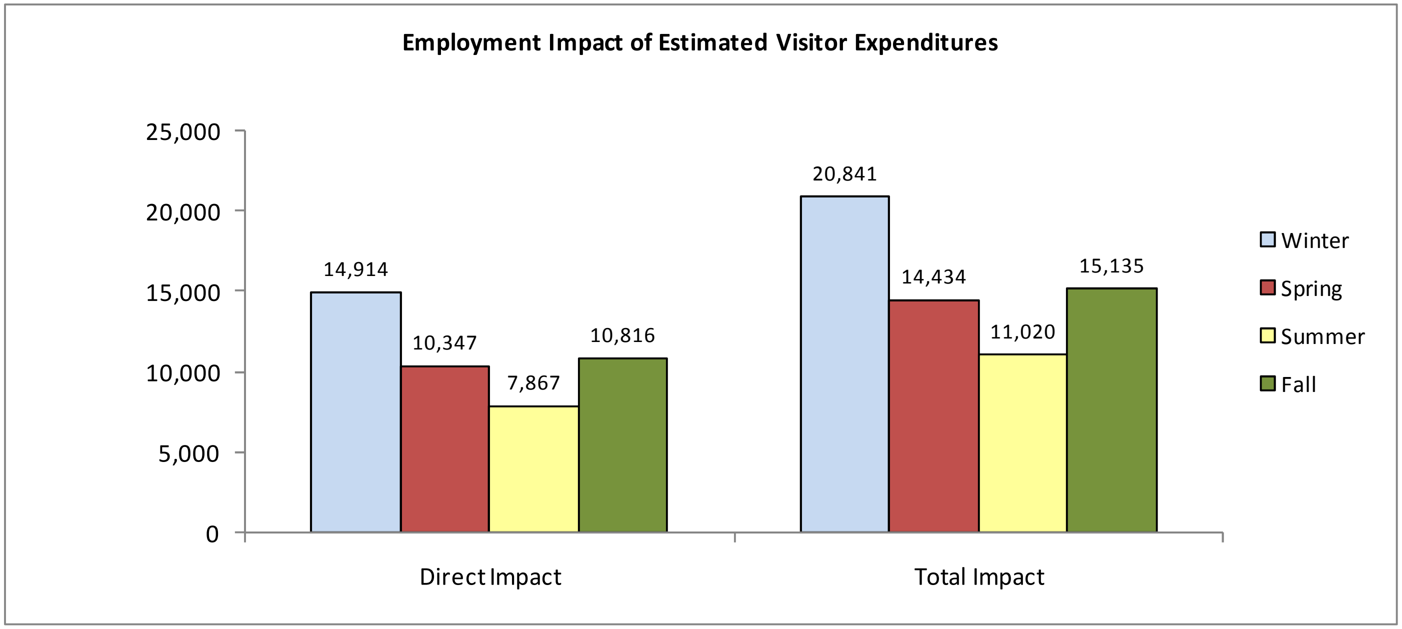
# Impact on Jobs for Lee County Residents

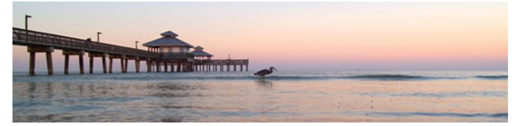
In order to produce the output (food, lodging, entertainment etc.) purchased by visitors, businesses have to employ people.

The number of jobs necessary to produce what is purchased with visitor expenditures is the employment impact of the visitor expenditures.

Direct employment includes the number of employees necessary to produce the direct output purchased with the visitor expenditures.

Total employment includes the number of employees necessary to produce the direct output purchased with the visitor expenditures PLUS the employees necessary to produce additional output purchased with the recirculation of money in Lee County. For example, wages paid to a hotel desk clerk are then used to purchase food and services for that employee, leading to additional supported jobs (grocery store proprietor, auto mechanic, etc.)





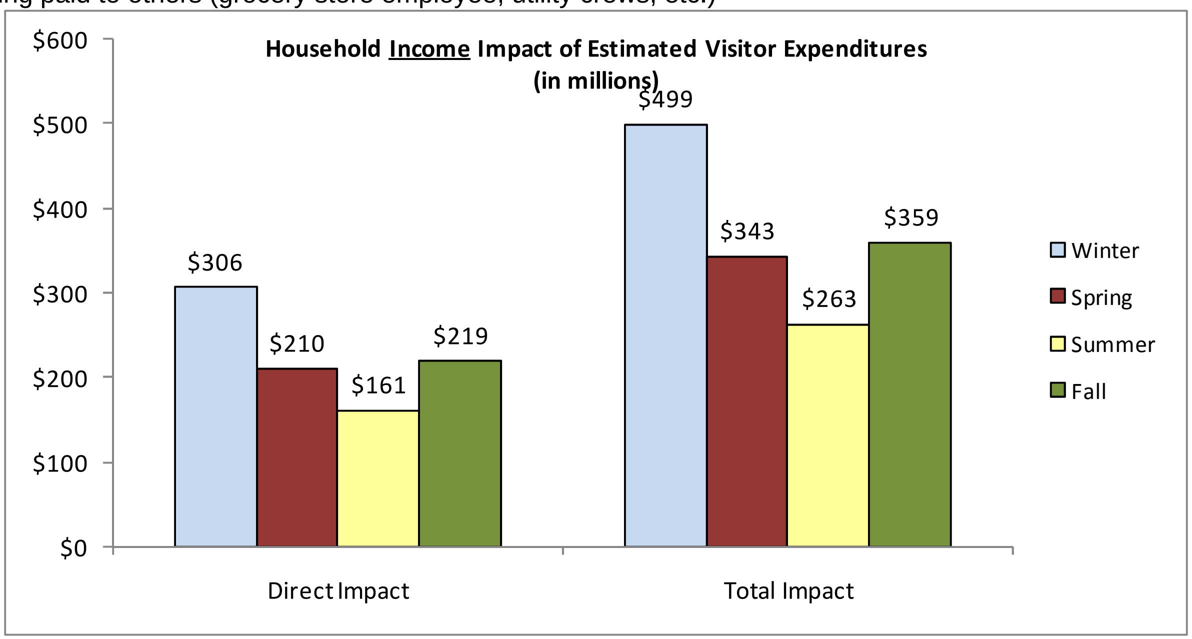
# Impact on Household Income for Lee County Residents

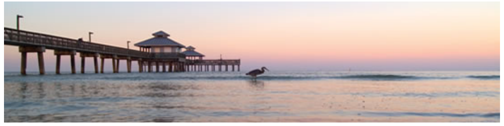
As stated earlier, in order to produce the output (food, lodging, entertainment, etc.) purchased by visitors, businesses have to employ people. This requires business owners to pay wages and salaries to their employees, and also includes proprietary income for the business owner in some cases.

The wages and salaries paid in order to produce what is purchased with visitor expenditures is the household income impact of the visitor expenditures.

<u>Direct household income impact</u> includes the direct wages and salaries paid in order to produce the goods and services purchased with the visitor expenditures.

<u>Total household income</u> includes the wages and salaries paid in order to produce the goods and services purchased with the visitor expenditures <u>PLUS</u> the wages and salaries necessary to produce the additional output purchased with the recirculation of money in Lee County. For example, wages brought home by a hotel desk clerk are then used to purchase food and services for that person and his/her family, leading to additional wages and salaries being paid to others (grocery store employee, utility crews, etc.)





# Impact on State and Local Government Revenues

In producing and selling any goods and services purchased by visitors, both local and state revenues are collected by local and state governments.

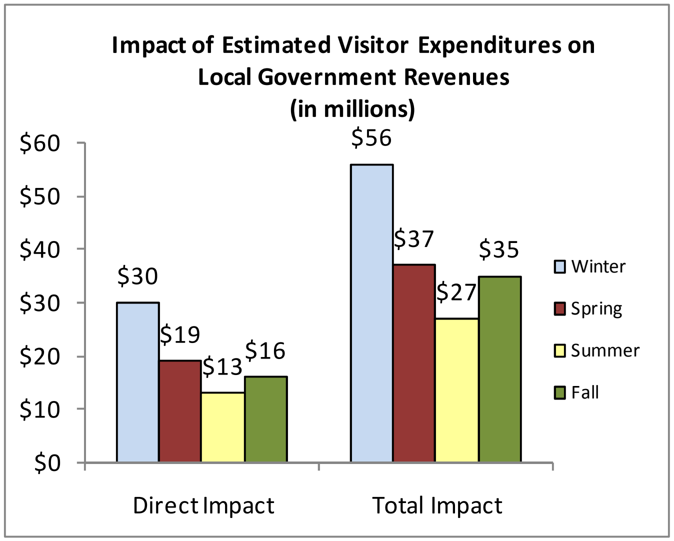
The gross government revenues accruing to governments as a result of producing the output purchased with visitor expenditures is the government revenue impact.

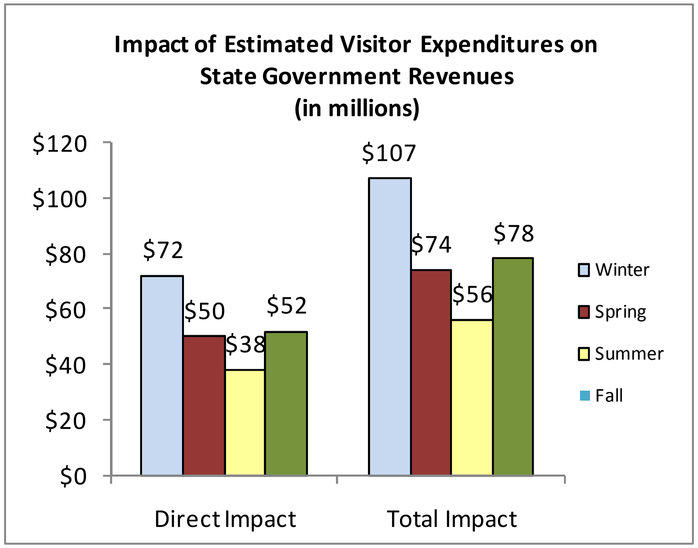
Local government revenue impact is a result of revenues provided to the local (Lee County) government.  This includes the bed tax, local property tax, any local-option sales tax, and any operating income for local government agencies.

State government revenue impact is a result of revenues provided to the Florida state government.  This includes sales tax and any operating income for state government agencies.

The following are included in government revenues as appropriate for the local area: gasoline taxes, vehicle licenses and registrations, boat registrations, hunting and fishing licenses, liquor taxes, local and state park user fees, etc.

Tax ratios used to calculate these government revenue impacts are adjusted to conform to data reported in State and Local Government Finance Data (SLGF, Bureau of the Census).



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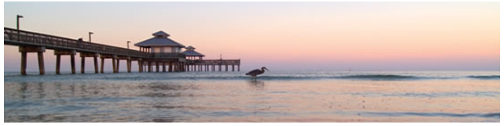
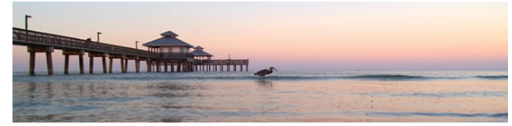
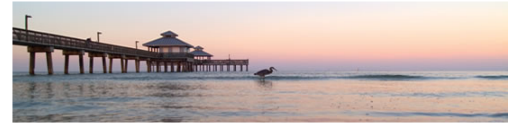


# Direct and Total Impact of Visitor Expenditures

| Impact of Estimated Visitor Expenditures | | | | | |
|---|---|---|---|---|---|
| | **Annual** | **Winter Jan-Mar08** | **Spring Apr-Jun08** | **Summer Jul-Sep08** | **Fall Oct-Dec08** |
| Direct Employment Impact | 43,944 | 14,914 | 10,347 | 7,867 | 10,816 |
| Total Employment Impact | 61,430 | 20,841 | 14,434 | 11,020 | 15,135 |
| | | | | | |
| Direct Household Income Impact | $895,992,895 | $306,010,000 | $210,394,900 | $160,814,803 | $218,773,192 |
| Total Household Income Impact | $1,464,090,303 | $498,560,000 | $343,158,500 | $263,282,374 | $359,089,429 |
| | | | | | |
| Direct Impact on Local Government Revenues | $78,078,246 | $29,816,000 | $19,262,340 | $12,868,935 | $16,130,971 |
| Total Impact on Local Government Revenues | $154,158,525 | $55,634,000 | $37,064,260 | $26,590,504 | $34,869,761 |
| | | | | | |
| Direct Impact on State Government Revenues | $211,415,734 | $71,975,000 | $49,594,390 | $37,617,757 | $52,228,587 |
| Total Impact on State Government Revenues | $314,962,246 | $107,075,000 | $73,813,490 | $56,287,928 | $77,785,828 |



# Appendix
# January – December 2008



## Interviewing Statistics

| 2008 Visitor Profile Interview Locations | | | |
|---|---|---|---|
| **City** | **Event/Location** | **City** | **Event/Location** |
| Bonita Springs | Bonita Beach | Ft. Myers Beach | Sand Sculptures Festival |
| Bonita Springs | Dog Beach | Ft. Myers Beach | The Pier |
| Bonita Springs | Lovers Key | Ft. Myers Beach | Times Square Arena |
| Cape Coral | Yacht Club Beach Park | N. Ft. Myers | Shell Factory |
| Ft. Myers | Best Western Resort | Sanibel | Casa Playa |
| Ft. Myers | Clarion Hotel | Sanibel | Casa Ybel Resort |
| Ft. Myers | Edison Home | Sanibel | Compass Point |
| Ft. Myers | Hilton Garden Inn | Sanibel | Coquina Beach Resort |
| Ft. Myers | Holiday Inn | Sanibel | Holiday Inn |
| Ft. Myers | Six Mile Cypress Wetland | Sanibel | Lighthouse Beach |
| Ft. Myers | Spring Training Hammond Field | Sanibel | Loggerhead Cay |
| Ft. Myers | Summerlin Square Trolley | Sanibel | Pelican Roost |
| Ft. Myers | Best Western | Sanibel | Periwinkle RV & Campground |
| Ft. Myers | Edison Ford Estates | Sanibel | Pointe Santo del Sanibel |
| Ft. Myers | Lani Kai Beach | Sanibel | Sanibel Beach |
| Ft. Myers Beach | Bel-Air Beach Club | Sanibel | Sanibel Beach Club |
| Ft. Myers Beach | Bowditch Point | Sanibel | Sanibel Inn |
| Ft. Myers Beach | Diamond Head Beach Resort | Sanibel | Sanibel Lighthouse |
| Ft. Myers Beach | Ft. Myers Beach | Sanibel | Sanibel Moorings |
| Ft. Myers Beach | Holiday Inn | Sanibel | Sanibel Siesta |
| Ft. Myers Beach | Kona Beach Club | Sanibel | Song of the Sea |
| Ft. Myers Beach | Lani Kai | Sanibel | Surfside |
| Ft. Myers Beach | Outrigger Beach Resort | Sanibel | Tortuga Beach Club |
| Ft. Myers Beach | Pink Shell Resort | Sanibel | Turtuga Resort |
| Ft. Myers Beach | Sand Castle Beach Club | Sanibel | Surf Rider Beach Club |
| Ft. Myers Beach | Sand Castle Inn | | |