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

Prepared for:

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

Prepared by:

providing direction in travel & tourism

September 23, 2009
Annual Visitor Profile and Occupancy Analysis
(July 2008 – June 2009)

Executive Summary
July 2008 – June 2009

Throughout this report, statistically significant differences between percentages for 2008 and 2009 are noted by < >.

Executive Summary

<u>Introduction</u>

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 (approximately 150 per month); and
- Residents of Lee County (100 per month).

This report covers the period of July 2008 through June 2008 compared with July 2007 through June 2008 and includes combined results for each of four seasons:

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

In the tables on following pages, we refer to the sum of the four seasons above as **2008** or **2009,** which are defined as follows:

2008	2009
July 2007 – June 2008	July 2008 – June 2009

Executive Summary

Visitor Estimates

- Lee County hosted 2.1 million visitors staying in paid accommodations during the twelve-month period from July 2008 through June 2009. An even greater number stayed with friends or relatives while visiting (2.7 million) for a total estimated visitation of 4.8 million for the year.

- Total visitation during July 2008-June 2009 was slightly lower than during the prior year (1.8% decrease). While visitation among those staying with friends and relatives was on par with the prior year (+0.4%), there was a modest decrease in visitation among those staying in paid accommodations (-4.7%).

- The majority of Lee County visitors staying in paid accommodations were from within the United States (73%) – about the same as for July 2007-June 2008 (76%).

- Lee County drew the largest proportion of international visitors from Germany (8%), the United Kingdom (6%), and Canada (5%) for the July 2008-June 2009 period. Among these top international markets, visitation was higher from Germany year-over-year but lower from Canada.

Total Visitation					
	%		Visitor Estimates		% Change 2008-2009
	2008	**2009**	**2008**	**2009**	
Paid Accommodations	44%	43%	2,171,249	2,070,095	-4.7%
Friends/Relatives	56%	57%	2,739,821	2,751,004	0.4%
Total Visitation			*4,911,070*	*4,821,099*	-1.8%
Visitor Origin – Visitors Staying in Paid Accommodations					
	2008	**2009**	**2008**	**2009**	
United States	76%	73%	1,642,609	1,517,626	-7.6%
Germany	6%	8%	129,194	175,725	36.0%
United Kingdom	6%	6%	122,602	123,806	1.0%
Canada	6%	5%	138,422	113,156	-18.3%
Scandinavia	1%	2%	22,411	38,606	72.3%
BeNeLux	2%	2%	36,913	34,613	-6.2%
Ireland	<1%	1%	6,592	23,963	263.5%
France	1%	1%	14,501	15,975	10.2%
Switzerland	1%	1%	13,183	11,981	-9.1%
Austria	1%	<1%	13,183	3,994	-69.7%
Other Europe	<1%	<1%	6,592	3,994	-39.4%
Other/No Answer	1%	<1%	25,048	6,656	-73.4%

- Among domestic residents staying in Lee County paid accommodations, two visitors in five were from the Midwest (42%), an increase over last year (36%). One-quarter were from the South (23%), one-quarter from the Northeast (23%), and only 2% from the West.

- The top U.S. feeder markets during July 2008-June 2009 were: Indianapolis, New York, Boston, Chicago, and Minneapolis. Indianapolis surpassed New York in number of visitors to Lee County, earning the number one spot, unlike last year when New York was the top DMA.

Total Visitation U.S. Region (Paid Accommodations)					
	%		Visitor Estimates		% Change
	2008	2009	2008	2009	2008-2009
Florida	10%	9%	167,425	142,444	-14.9%
South (including Florida)	22%	23%	366,489	347,456	-5.2%
Midwest	36%	42%	590,601	631,013	6.8%
Northeast	20%	23%	334,850	342,131	2.2%
West	5%	2%	80,417	34,613	-57.0%
No Answer	16%	11%	268,934	163,744	-39.1%

Top DMAs (Paid Accommodations)				
	%	Visitor Estimates	2009 Rank	2008 Rank
Indianapolis	6%	93,188	1	4
New York	6%	83,869	2	1
Chicago	5%	73,219	3	2
Boston	5%	73,219	4	3
Minneapolis-St. Paul	4%	53,250	5	6
Philadelphia	3%	47,925	6	7
Detroit	3%	47,925	7	9T
Cleveland	3%	41,269	8	12
Cincinnati	3%	41,269	9	9T
Miami	3%	38,606	10	8

Visitor Expenditures

- In total visitors spent an estimated $2.9 billion in Lee County from July 2008-June 2009, down 1.3% from the prior year. More than half of these dollars were spent by visitors staying in paid accommodations ($1.6 billion), and the remainder were spent by visitors staying with friends or relatives ($1.3 billion). Expenditures among those staying with friends and relatives increased a modest amount (+5.4%) year-over-year, but visitors staying in paid accommodations showed a modest decrease in expenditures (-6.0%) over July 2007-June 2008.

- Average per person per day expenditures were $124.62 for July 2008-June 2009, which was a 5.4% decrease compared with the prior year average of $131.68.

Estimated Visitor Expenditures			
	2008	2009	% Change
Total Visitor Expenditures	**$2,956,459,166**	**$2,918,990,058**	**-1.3%**
Paid Accommodations	$1,734,147,871	$1,630,718,163	-6.0%
Visiting Friends and Relatives	$1,222,311,295	$1,288,271,895	5.4%
Average Expenditures Per Person Per Day	$131.68	$124.62	-5.4%

- As expected, total expenditures were lowest during the summer season (July-September 2008) and highest during the winter season (January-March 2009).

Estimated Visitor Expenditures					
	Annual Total	Summer 2008	Fall 2008	Winter 2009	Spring 2009
Total Visitor Expenditures	**$2,918,990,058**	**$523,649,638**	**$721,896,282**	**$1,023,444,885**	**$649,999,253**
Paid Accommodations	$1,630,718,163	$277,270,224	$401,250,140	$611,882,182	$340,315,617
Visiting Friends and Relatives	$1,288,271,895	$246,379,414	$320,646,142	$411,562,703	$309,683,636

Trip Planning

- Two-thirds of visitors made the decision to come to Lee County three months or more before they came (65%), which is somewhat higher than the prior year (58%). As was seen last year, Florida residents continued to have a shorter planning window for Lee County trips than did out-of-state residents – half chose Lee County for their trip less than three months prior to their trip (48%) while only one-third of out-of-state residents reported the same (31%). Interestingly, first time visitors are more likely to plan their trip within three months of their visit, while repeat visitors are more likely to plan further out.

- The majority of July 2008-June 2009 visitors mention visiting websites while planning their Lee County trip (80%). The incidence of doing so is higher than the prior year (72%). Airline websites and online search engines were the most frequently cited websites visited when planning a Lee County trip, with one-third of visitors having used each. In general, visitors staying in paid accommodations were more likely to visit websites in their planning than were those staying with friends/relatives or day trippers.

- *Warm weather*, *peaceful/relaxing*, *white sandy beaches*, and *safe destination* continued to be the influential attributes for most visitors in selecting Lee County as a travel destination among July 2008-June 2009 visitors. Not unexpectedly, *warm weather* was influential for a greater proportion of visitors from the Northeast and Midwest than those from the South and West.

- One-fourth of Lee County visitors said they recalled seeing or reading advertising or promotions for the Lee County area in the past six months (24%). Recall was highest among in-state visitors. Repeat visitors also showed more widespread recall of Lee County advertising than did first-timers.

Visitor Profile

- The majority of Lee County's visitors were repeat visitors (72%). First-time visitors were more prevalent during the summer season (July-September 2008), when one-third were first-time visitors (35% vs. 21%-27% in other seasons).

- Two-thirds of Lee County July 2008-June 2009 visitors flew to the area (65%). Most Lee County visitors who arrived by airplane landed at Southwest Florida International Airport (77%). Not surprisingly, visitors from the South were more likely to drive (60%) than were visitors from other regions.

- When compared to the prior year, visitors during July 2008-June 2009 were more likely to stay in condos/vacation homes (36% vs. 27% prior year) and less likely to stay in hotels/motels (35% vs. 44% prior year). The shift toward more cost-effective condos/vacation homes was most prevalent during the summer, fall, and winter seasons but appears to have turned the corner with the spring season. Importantly, half of those who stayed in paid accommodations said the quality of their accommodations far exceeded/exceeded expectations (51%) compared with 45% the prior year.

- The top activities enjoyed while in Lee County during July 2008 - June 2009 were *beaches*, *relaxing*, *dining out*, *swimming*, and *shopping.* Visitor satisfaction remained prevalent, with 94% of July 2008-June 2009 visitors reporting that they were satisfied with their visit to Lee County. Most visitors indicated they will likely recommend Lee County as a vacation destination (89%) and many plan to return (90%).

- When asked about their least liked features of Lee County, the top concerns were *traffic* (30%), *beach seaweed* (21%), and *insects* (20%). 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.

- During July 2008-June 2009, visitors averaged 48 years of age with an average annual household income of $96,000. More than two-thirds are married (70%) but only one-third were traveling with children (30%). The demographic profile is very similar to that of visitors during July 2007-June 2008.

Lodging Property Manager Assessments

- Overall, available room nights increased somewhat (+4.8%) for the period July 2008-June 2009 over July 2007-June 2008, and occupied room nights increased as well (+1.1%). Hotel/motels had an increase of 4.7% in *available* room nights but demand for those room nights was slightly lower than the prior year (-3.8%). While hotel/motel *occupied* room nights were down for the first half of the year (July-December 2008), the number of room nights sold in the second half of the year (January 2009-June 2009) was just slightly higher than the same period the prior year, even with the continued increases in supply. Such a finding suggests a strengthening demand in the hotel/motel/resort category.

	Occupied Room Nights			Available Room Nights		
	2008	**2009**	**% Change**	**2008**	**2009**	**% Change**
Hotel/Motel/Resort/B&B	2,155,660	2,072,851	-3.8%	3,733,656	3,908,327	4.7%
Condo/Cottage/Vacation Home	1,025,313	980,826	-4.3%	2,009,680	1,915,088	-4.7%
RV Park/Campground	701,367	872,384	24.4%	1,519,950	1,788,358	17.7%
Total	**3,882,340**	**3,926,061**	**1.1%**	**7,263,286**	**7,611,773**	**4.8%**

- Lee County lodging properties experienced declines in occupancy rates, ADR, and RevPAR year-over-year for the twelve-month period. Average occupancy rates dropped from 53.5% for July 2007-June 2008 to 51.6% for July 2008-June 2009 (-3.6%). RV Park/campground properties saw a 5.9% increase in occupancy rates, condos/vacation homes remained stable (+0.4%), and hotel/motels declined (-8.1%).

- Average daily rates for the year dropped from $138.15 in 2008 to $123.08 in 2009 (-10.9%), with winter 2009 taking the biggest hit in rate cuts. The RV park/campground category actually posted an increase in ADR (+6.6%), while hotel/motel/resort and condo/vacation home properties posted decreases (-8.9% and -8.3% respectively).

- Lower average daily rates and occupancy led to decreased RevPAR for hotels/motels (-16.3%) and condos/vacation homes (-8.0%). RV parks/campgrounds showed an increase in RevPAR (+12.7%) due to increases in both average daily rate and occupancy rate.

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2008	**2009**	**% Change**	**2008**	**2009**	**% Change**	**2008**	**2009**	**% Change**
Total Responses	1,603	1,730		1,592	1,751		1,603/1,592	1,730/1,751	
Hotel/Motel/Resort/B&B	57.7%	53.0%	-8.1%	$146.19	$133.18	-8.9%	$84.40	$70.63	-16.3%
Condo/Cottage/Vacation Home	51.0%	51.2%	0.4%	$187.30	$171.74	-8.3%	$95.56	$87.96	-8.0%
RV Park/Campground	46.1%	48.8%	5.9%	$41.62	$44.36	6.6%	$19.20	$21.64	12.7%
AVERAGE	**53.5%**	**51.6%**	-3.6%	**$138.15**	**$123.08**	-10.9%	**$73.85**	**$63.48**	-14.0%

- Coastal properties tended to fare better than inland properties during the July 2008-June 2009 period, showing higher average daily rates and occupancy rates across all lodging categories combined.

- Property managers were more likely to be negative during the July 2008-June 2009 period when comparing the current month's occupancy and revenue to the same month in the prior year. Such pessimism was most prevalent during the early part of the year and among those managing hotel/motel/resort and inland properties.

  For July 2008-June 2009, more than half of property managers (55%) reported that their current month's occupancy was *worse* than the same month the prior year, and fewer than one-quarter (22%) reported it was *better* (compared with 43% reporting *worse* and 33% *better* for July 2007-June 2008).

  - Property managers were less likely to be optimistic during summer 2008 (16% reporting *better* occupancy), but more were optimistic for the balance of the year (23-24% reporting *better* occupancy).
  - Hotel/motel/resort property managers were more likely to report *worse* occupancy (67%) than were condo/vacation home or RV park/campground managers (41% and 33% respectively). Additionally, a higher proportion of inland properties reported *worse* occupancy than did coastal properties (63% vs. 50%).

  Similar to occupancy, three property managers in five (59%) reported their revenue was worse than the same month the prior year, and only one in five (20%) reported it was *better* (compared with 41% reporting *worse* and 36% reporting *better* for July 2007-June 2008). The patterns by property type and location resembled the occupancy comparisons. At the same time, there were no marked differences in revenue comparisons by season.

- When asked to compare their next three month's reservations with the same period the prior year, lodging property managers expressed increasing pessimism as the year progressed. The proportion of managers reporting their reservations were down for the next three months was:
  - 46% in summer 2008;
  - 54% in fall 2008;
  - 61% in winter 2009; and
  - 62% in spring 2009.

Conclusions

- During July 2008-June 2009, nearly five million people visited Lee County and spent three billion dollars in the local economy. Both visitation and expenditures are down slightly versus the prior year. The year-over-year decline in visitation was driven by a lagging summer season in 2008. Visitation during fall 2008, winter 2009, and spring 2009 was the same or higher than the same periods the prior year, suggesting a more positive outlook for the future. The decrease in total dollars spent in the County was due primarily to lower average daily rates than the prior year – a sacrifice the lodging industry has made in general to hold occupancy. The decreases in demand and spending for the U.S. travel industry as a whole during the first half of 2009 were more severe, and within this context, Lee County appears to be faring better than others.

- With regard to the lodging industry, the number of room nights sold was slightly higher in July 2008-June 2009 than in July 2007-June 2008 despite an increased inventory of available room night. Naturally, as the inventory growth slows, it will help to buoy room nights sold even further and as a result, increase average occupancy rates.

- While the majority of visitors to Lee County are repeaters, first time visitors remain critical to broadening the base of visitors so that they in turn will be converted to repeaters in the future.

- Indianapolis emerged as the number one feeder market for Lee County visitors during July 2008-June 2009. As marketing efforts ramp-up for this market in the coming year, we would expect visitation to increase even more.

- Lee County is not likely to experience growth in the International market. Forecasts suggest that International in-bound travel to the U.S. will continue to falter during the second half of 2009. This sentiment was shared by Lee County accommodations managers during July 2008-June 2009 when they indicated that fewer of their guests for the next three months would be coming from Europe and Canada than the same period the prior year.

July 2008 - June 2009 Lee County Snapshot

Total Visitation				
	%		Visitor Estimates	
	2008	2009	2008	2009
Paid Accommodations	44%	43%	2,171,249	2,070,095
Friends/Relatives	56%	57%	2,739,821	2,751,004
Total Visitation			*4,911,070*	*4,821,099*

Total Visitor Expenditures			
	2008	2009	% Change
Total Visitor Expenditures	$2,956,459,166	$2,918,990,058	-1.3%
Paid Accommodations	$1,734,147,871	$1,630,718,163	-6.0%

Visitor Origin – Visitors Staying in Paid Accommodations				
	%		Visitor Estimates	
	2008	2009	2008	2009
Florida	10%	9%	167,425	142,444
United States	76%	73%	1,642,609	1,517,626
Germany	6%	8%	129,194	175,725
United Kingdom	6%	6%	122,602	123,806
Canada	6%	5%	138,422	113,156
Scandinavia	1%	2%	22,411	38,606
BeNeLux	2%	2%	36,913	34,613
Ireland	<1%	1%	6,592	23,963
France	1%	1%	14,501	15,975
Switzerland	1%	1%	13,183	11,981
Austria	1%	<1%	13,183	3,994
Other Europe	<1%	<1%	6,592	3,994
Other/No Answer	1%	<1%	25,048	6,656

Average Per Person Per Day Expenditures		
2008	2009	% Change
$131.68	$124.62	-5.4%

First-Time/Repeat Visitors to Lee County		
	2008	2009
First-time	28%	27%
Repeat	70%	72%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2008	2009	% Change	2008	2009	% Change	2008	2009	% Change
Total Responses	1,603	1,730		1,592	1,751		1,603/1,592	1,730/1,751	
Hotel/Motel/Resort/B&B	57.7%	53.0%	-8.1%	$146.19	$133.18	-8.9%	$84.40	$70.63	-16.3%
Condo/Cottage/Vacation Home	51.0%	51.2%	0.4%	$187.30	$171.74	-8.3%	$95.56	$87.96	-8.0%
RV Park/Campground	46.1%	48.8%	5.9%	$41.62	$44.36	6.6%	$19.20	$21.64	12.7%
AVERAGE	53.5%	**51.6%**	-3.6%	**$138.15**	**$123.08**	-10.9%	**$73.85**	**$63.48**	-14.0%

Visitor Profile Analysis
July 2008 – June 2009

A total of 2,459 interviews were conducted with visitors in Lee County during the months of July 2008 – June 2009. A total sample of this size is considered accurate to plus or minus 1.95 percentage points at the 95% confidence level.

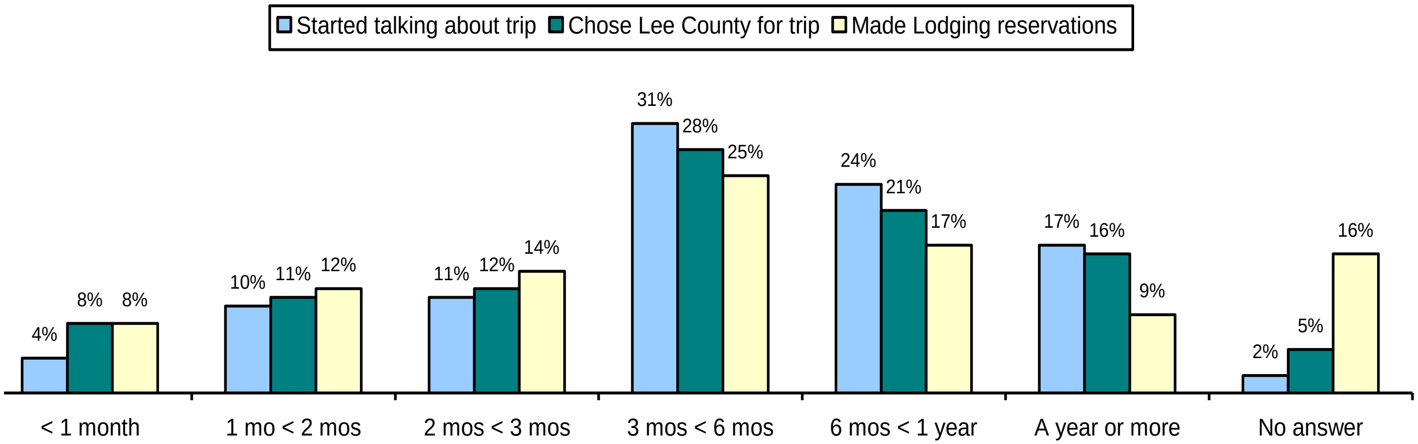
A total of 2,429 interviews were conducted with visitors in Lee County during the months of July 2007 – June 2008. A total sample of this size is considered accurate to plus or minus 1.96 percentage points at the 95% confidence level.

Travel Planning

	Started Talking About Trip		Chose Lee County for Trip		Made Lodging Reservations	
	2008	2009	2008	2009	2008	2009
Total Respondents	2,429	2,459	2,429	2,459	2,429	2,459
< 1 month	<7%>	4%	9%	8%	<12%>	8%
1 mo - < 2 mos	<12%>	10%	<13%>	11%	<15%>	12%
2 mos - < 3 mos	<13%>	11%	13%	12%	13%	14%
3 mos - < 6 mos	28%	<31%>	24%	<28%>	21%	<25%>
6 mos - < 1 year	23%	24%	20%	21%	16%	17%
A year or more	14%	<17%>	14%	<16%>	8%	9%
No answer	<3%>	2%	<7%>	5%	16%	16%

Q3: When did you "start talking" about going on this trip?
Q4: When did you choose Lee County for this trip?
Q5: When did you make lodging reservations for this trip?

Travel Planning



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Travel Planning

Reserved Accommodations		
	2008	**2009**
Total Respondents	2,429	2,459
Before leaving home	79%	81%
After arriving in FL	<8%>	6%
On the road, but not in FL	<1%>	<1%
No answer	12%	13%

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

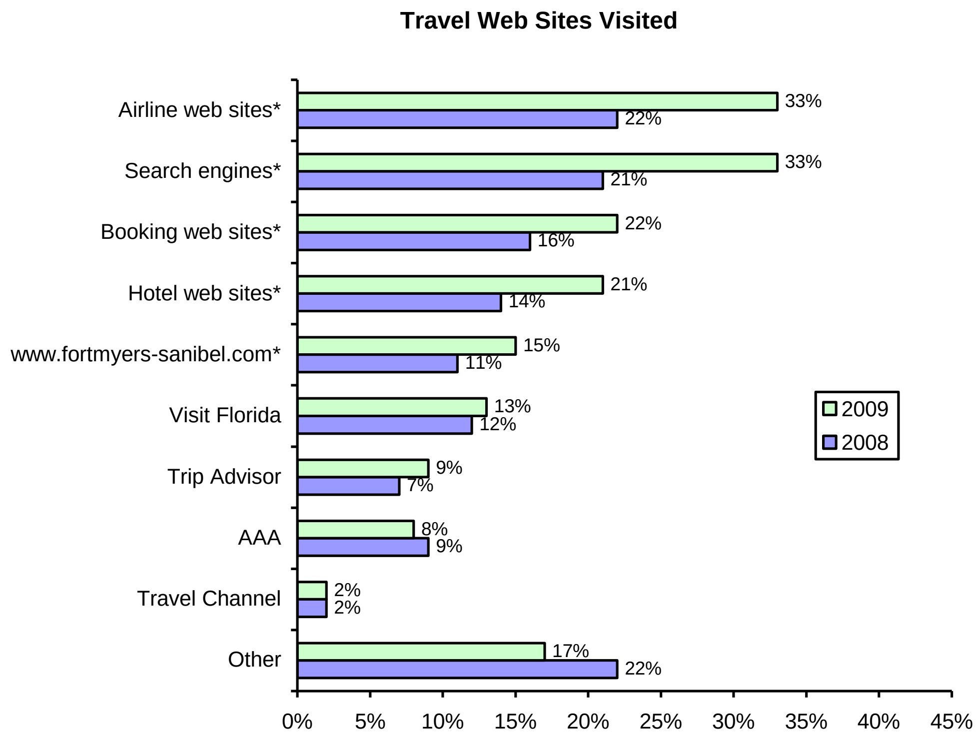
Computer Access		
	2008	**2009**
Total Respondents	2,429	2,459
Yes	91%	91%
Home	<30%>	26%
Work	<4%>	2%
Both Home and Work	57%	<62%>
No	9%	8%

Q8: Do you have access to a computer?

Travel Planning

Travel Web Sites Visited by Travelers		
	2008	**2009**
Total Respondents with computer access	2,198	2,226
Visited web sites (net)	72%	<80%>
*Airline web sites**	22%	<33%>
*Search engines**	21%	<33%>
Booking web sites	16%	<22%>
Hotel web sites	14%	<21%>
www.fortmyers-sanibel.com	11%	<15%>
Visit Florida	12%	13%
Trip Advisor	7%	<9%>
AAA	9%	8%
Travel Channel	2%	2%
Other	<22%>	17%
Did not visit web sites	<23%>	17%
No Answer	5%	4%

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



Base: Respondents with Computer Access

** Note: These answer categories were added to the questionnaire in October 2007. Therefore, year-over-year results are not directly comparable.*

Travel Planning

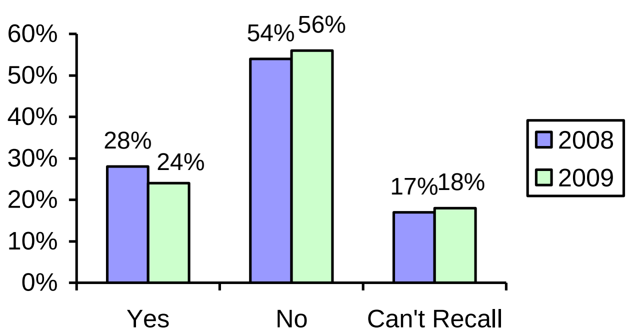
Travelers Requesting Information		
	2008	**2009**
Total Respondents	2,429	2,459
Requested Information (net)	36%	34%
Hotel Web Site	12%	12%
VCB Web Site	7%	7%
Call hotel	7%	6%
Visitor Guide	6%	6%
Call local Chamber of Commerce	2%	1%
Calling VCB toll free number	1%	1%
Clipping/mailing coupon	1%	1%
Returning a magazine's reader service card	<1%	<1%
Receiving e-newsletter Paradise.com	<1%	<1%
Other	<14%>	12%
Did not request information	51%	52%
No Answer	13%	<15%>

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

Travel Agent Assistance		
	2008	**2009**
Total Respondents	2,429	2,459
Yes	6%	<7%>
No	<93%>	91%

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

Recall of Promotions



Recall of Lee County Promotions		
	2008	**2009**
Total Respondents	2,429	2,459
Yes	<28%>	24%
No	54%	56%
Can't Recall	17%	18%

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

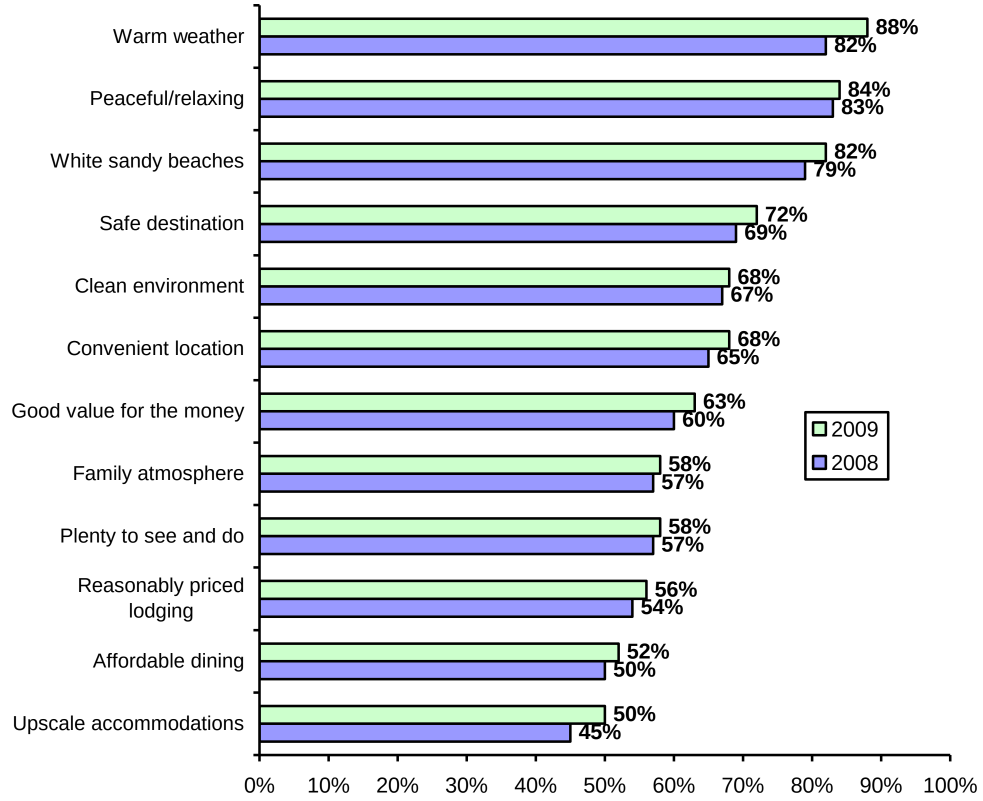
Travel Planning

Travel Decision Influences*		
	2008	**2009**
Total Respondents	2,429	2,459
Warm weather	82%	<88%>
Peaceful/Relaxing	83%	84%
White sandy beaches	79%	82%
Safe destination	69%	<72%>
Clean environment	67%	68%
Convenient location	65%	<68%>
Good value for the money	60%	<63%>
Family atmosphere	57%	58%
Plenty to see and do	57%	58%
Reasonably priced lodging	54%	56%
Affordable dining	50%	52%
Upscale accommodations	45%	<50%>

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)*

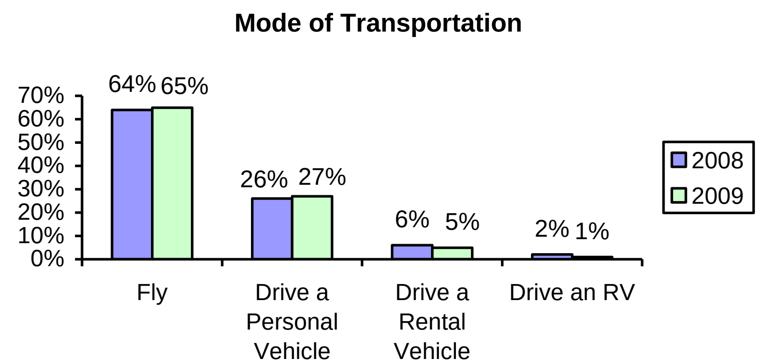
Travel Decision Influences*



Trip Profile

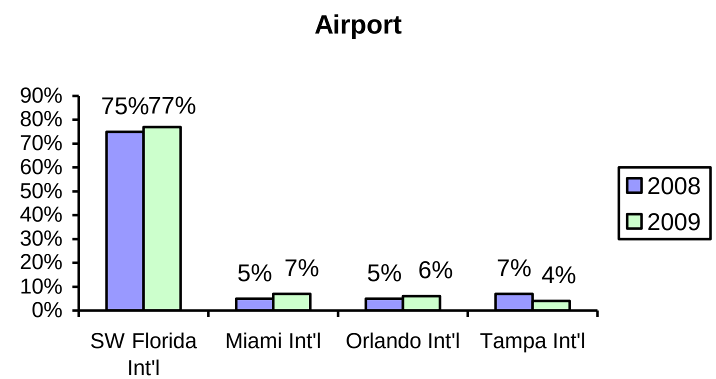
Mode of Transportation		
	2008	**2009**
Total Respondents	2,429	2,459
Fly	64%	65%
Drive a Personal Vehicle	26%	27%
Drive a Rental Vehicle	6%	5%
Drive an RV	2%	1%
Other/No answer	2%	2%

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



Airport		
	2008	**2009**
Total Respondents who Arrived by Air	1,562	1,605
SW Florida Int'l	75%	77%
Miami Int'l	5%	<7%>
Orlando Int'l	5%	6%
Tampa Int'l	<7%>	4%
Ft. Lauderdale Int'l	1%	2%
Sarasota/Bradenton	1%	1%
West Palm Beach Int'l	1%	<1%
Other/No Answer	<5%>	3%

Q2: At which Florida airport did you land?



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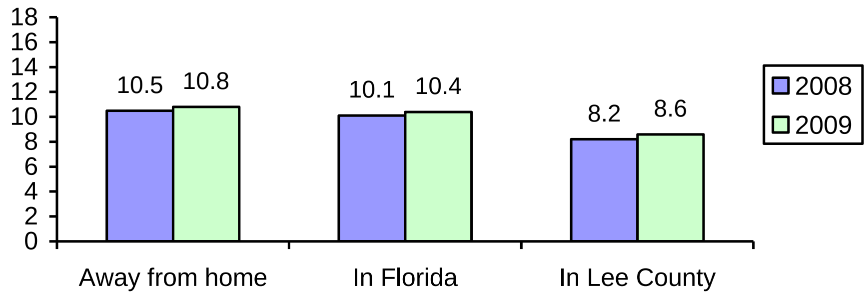
Trip Profile

Trip Length Mean # of Days			
	Total Respondents		
	2008	2009	% Change
Total Respondents	2,429	2,459	
Away from home	10.5	10.8	2.9%
In Florida	10.1	<10.4>	3.0%
In Lee County	8.2	<8.6>	4.9%

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

Trip Length (mean # of days)
Total Respondents

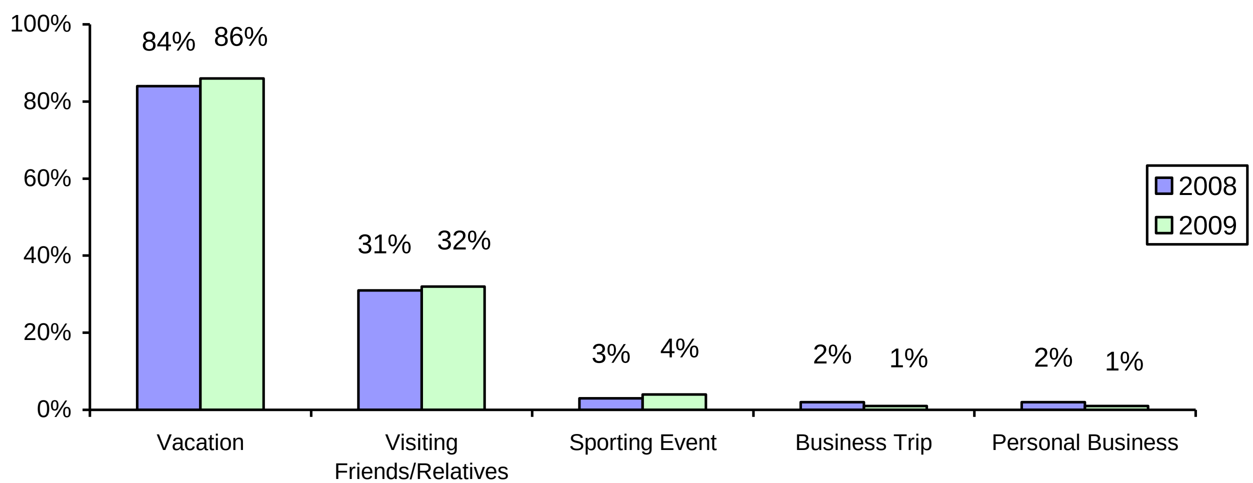


Trip Profile

Reason for Visit		
	2008	**2009**
Total Respondents	2,429	2,459
Vacation	84%	86%
Visiting Friends/Relatives	31%	32%
Sporting Event	3%	4%
Business Trip	2%	1%
Personal Business	2%	1%
Convention/Trade Show	<1%	<1%
Other	<4%>	3%

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

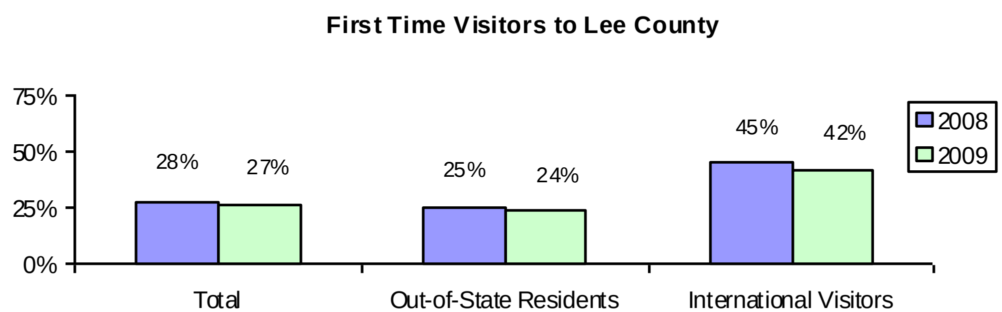
Reason for Visit

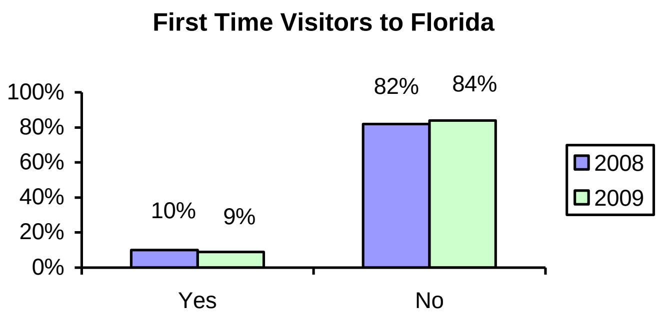


Trip Profile

First Time Visitors to Lee County								
	Total		**Florida Residents**		**Out-of-State Residents**		**International Visitors**	
	2008	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**
Total Respondents	2,429	2,459	159	145	1,444	1,552	493	534
Yes	28%	27%	22%	17%	25%	24%	45%	42%
No	70%	72%	75%	79%	75%	75%	54%	57%
No answer	2%	1%	3%	4%	1%	1%	1%	1%

Q20: Is this your first visit to Lee County?





First Time Visitors to Florida		
	2008	**2009**
Total Respondents	2,429	2,459
Yes	10%	9%
No	82%	84%
No Answer	2%	1%
*FL Residents**	*7%*	*6%*

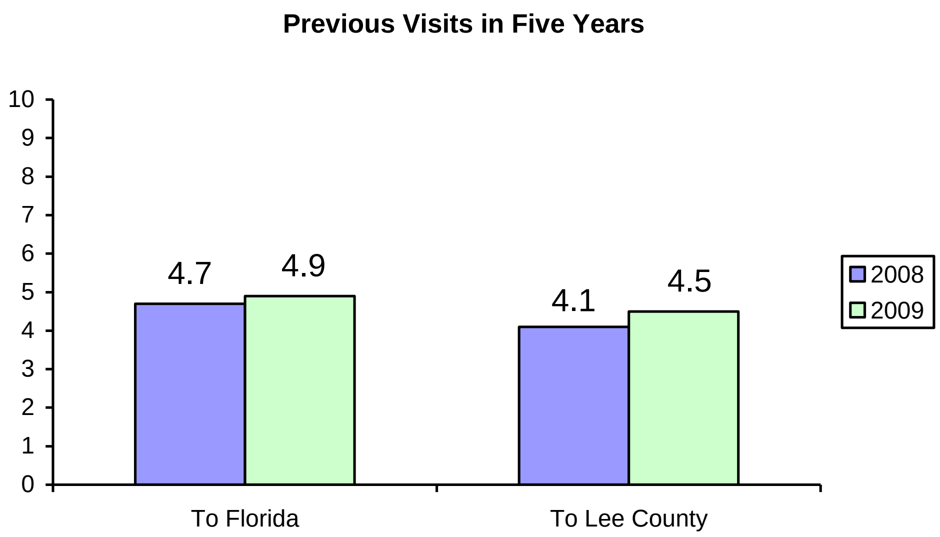
Q18. Is this your first visit to Florida?

** Florida residents are shown as a proportion of total visitor interviews conducted, though FL residents are not asked this question.*

Trip Profile

Previous Visits in Five Years				
	Mean # of Visits To Florida		Mean # of Visits To Lee County	
	2008	2009	2008	2009
Base: Repeat Visitors	1,995 (FL res. Excl.)	2,068 (FL res. Excl.)	1,699	1,767
Number of visits	4.7	4.9	4.1	4.5

Q19: Over the past five (5) years, how many times have you visited Florida?
Q21: Over the past five (5) years, how many times have you visited Lee County?

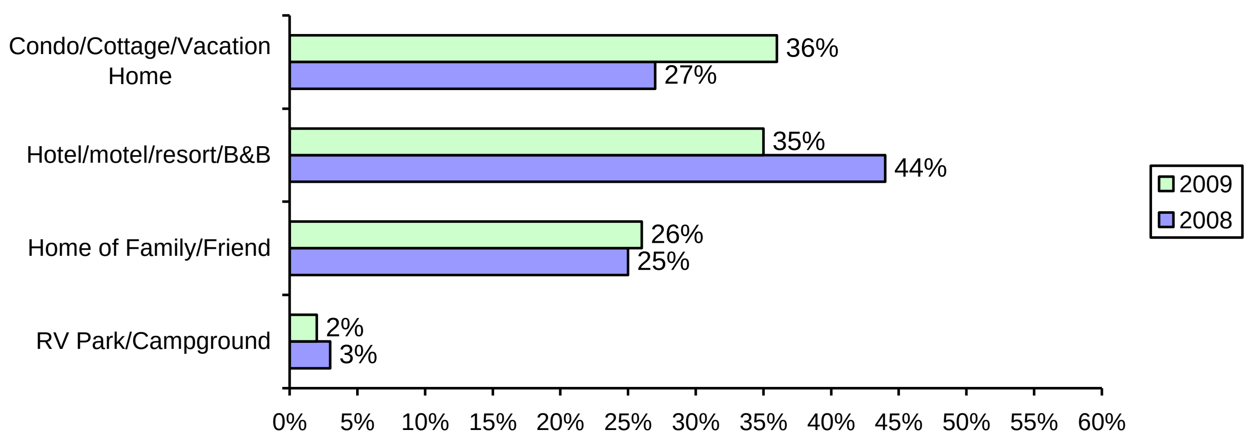


Trip Profile

Type of Accommodations		
	2008	**2009**
Total Respondents	2,429	2,459
Hotel/Motel/Resort/B&B	**<44%>**	**35%**
Hotel/motel/inn	<31%>	23%
Resort	13%	12%
B&B	<1%	<1%
Condo/Cottage/Vacation Home	**27%**	**<36%>**
Rented home/condo	21%	<26%>
Borrowed home/condo	4%	5%
Owned home/condo	2%	<5%>
RV Park/Campground	**<3%>**	**2%**
Home of family/friend	**25%**	**26%**
Day trip (no accommodations)	**1%**	**1%**
No Answer	<1%	<1%

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

Type of Accommodations - Visitors

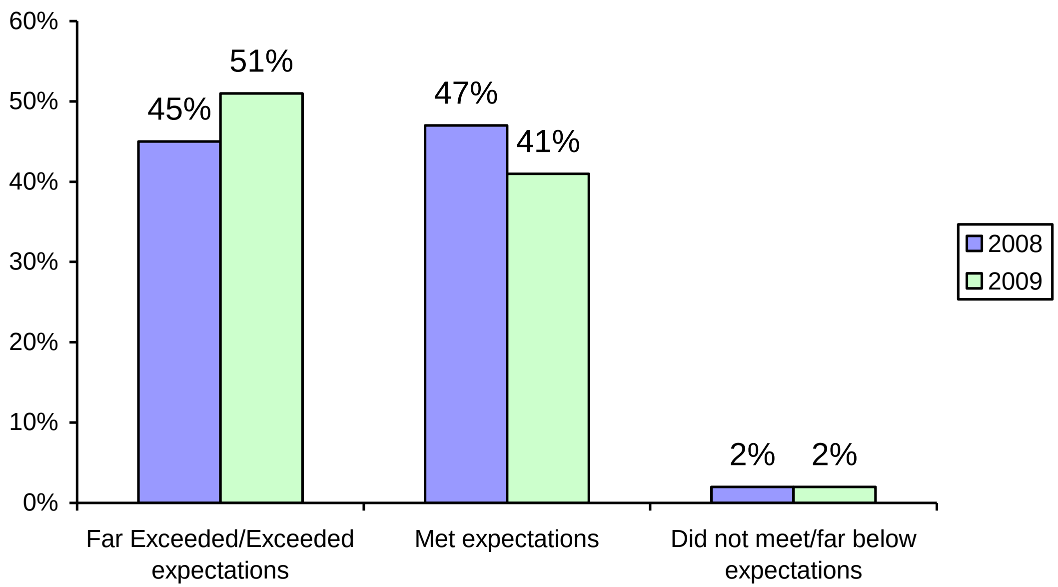


Trip Profile

Quality of Accommodations		
	2008	2009
Total Respondents	2,429	2,459
Far exceeded/Exceeded expectations	45%	<51%>
Met expectations	<47%>	41%
Did not meet/Far below expectations	2%	2%
No Answer	6%	6%

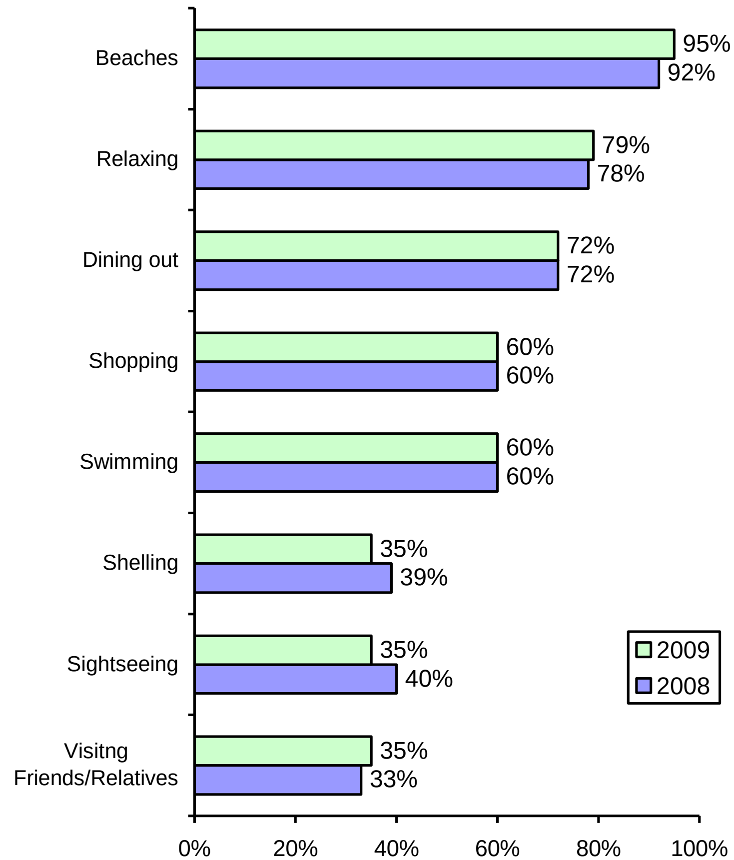
Q26: How would you describe the quality of your accommodations? Do you feel that they:

Quality of Accommodations



Trip Activities

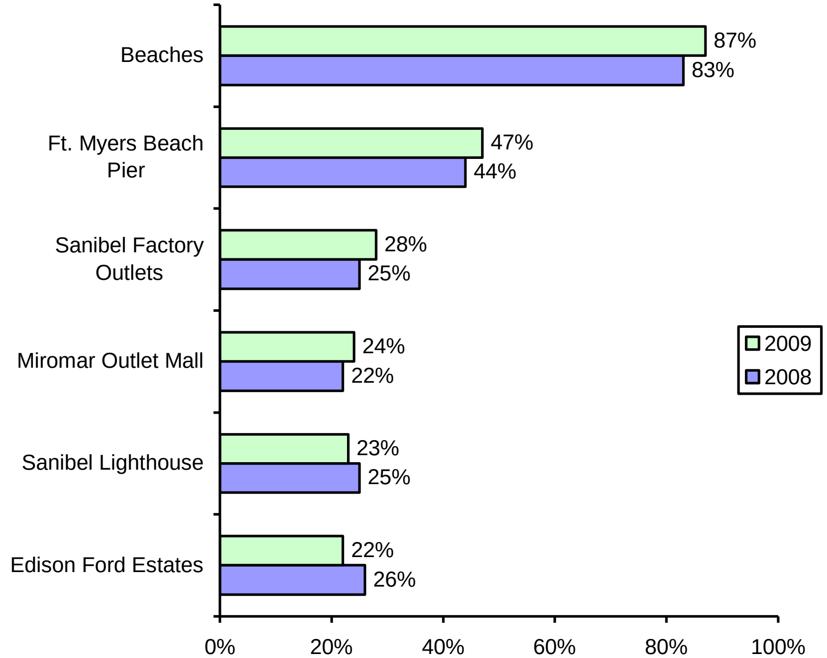
Activities Enjoyed		
	2008	**2009**
Total Respondents	2,429	2,459
Beaches	92%	<95%>
Relaxing	78%	79%
Dining Out	72%	72%
Shopping	60%	60%
Swimming	60%	60%
Shelling	<39%>	35%
Sightseeing	<40%>	35%
Visiting Friends/Relatives	33%	35%
Attractions	<30%>	25%
Photography	23%	22%
Watching Wildlife	22%	22%
Bars/Nightlife	16%	<20%>
Exercise/Working Out	15%	16%
Bicycle Riding	<16%>	14%
Birdwatching	15%	14%
Fishing	11%	12%
Boating	10%	12%
Golfing	9%	<11%>
Miniature Golf	11%	10%
Parasailing/Jet Skiing	7%	8%
Sporting Event	7%	<8%>
Guided Tour	<7%>	5%
Kayaking/Canoeing	6%	5%
Cultural Events	5%	4%
Tennis	4%	4%
Scuba Diving/Snorkeling	<4%>	3%
Other	4%	4%



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

Trip Activities

Attractions Visited		
	2008	**2009**
Total Respondents	2,429	2,459
Beaches	83%	<87%>
Ft. Myers Beach Pier	44%	<47%>
Sanibel Factory Outlets (Tanger)	25%	<28%>
Miromar Outlet Mall	22%	24%
Sanibel Lighthouse	25%	23%
Edison Ford Estates	<26%>	22%
Bell Tower Shops	17%	16%
Ding Darling National Wildlife Refuge	<18%>	15%
Edison Mall	15%	15%
Coconut Point Mall	11%	13%
Periwinkle Place	14%	12%
Shell Factory and Nature Park	<13%>	10%
Gulf Coast Town Center	5%	<8%>
Manatee Park	4%	5%
Bailey-Matthews Shell Museum	<5%>	3%
Broadway Palm Dinner Theater	3%	3%
Barbara B. Mann Performing Arts Hall	1%	1%
Babcock Wilderness Adventures	1%	1%
Other	5%	<8%>
None/No Answer	4%	3%

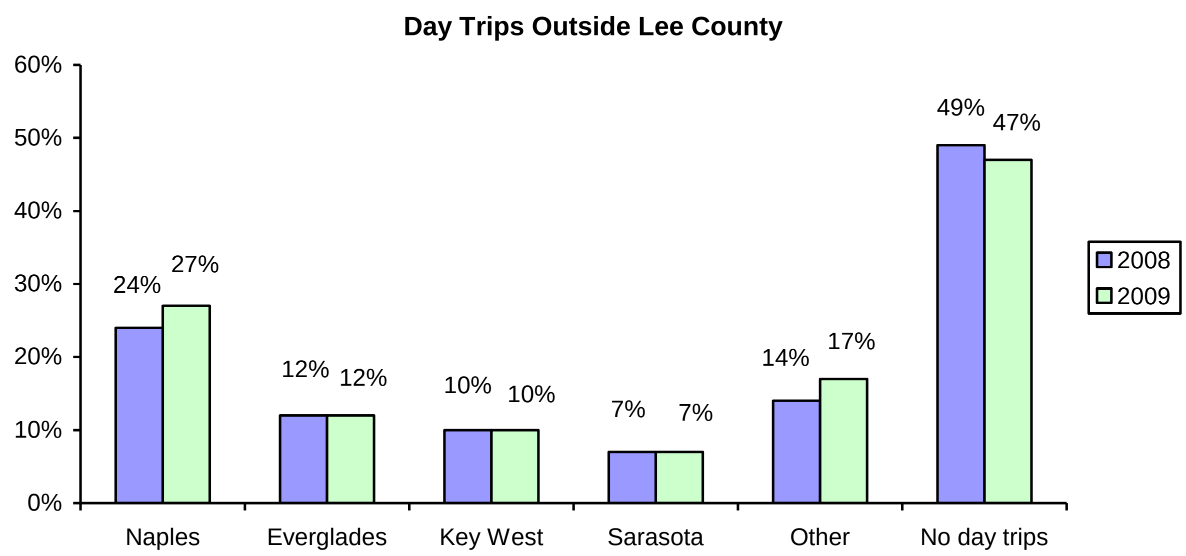


Q29: On this trip, which attractions are you visiting?
(Please mark ALL that apply.)

Trip Activities

Day Trips Outside Lee County		
	2008	**2009**
Total Respondents	2,429	2,459
Any Day Trips (net)	45%	47%
Naples	*24%*	*<27%>*
Everglades	*12%*	*12%*
Key West	*10%*	*10%*
Sarasota	*7%*	*7%*
Other	*14%*	*<17%>*
No day trips	49%	47%
No answer	6%	6%

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

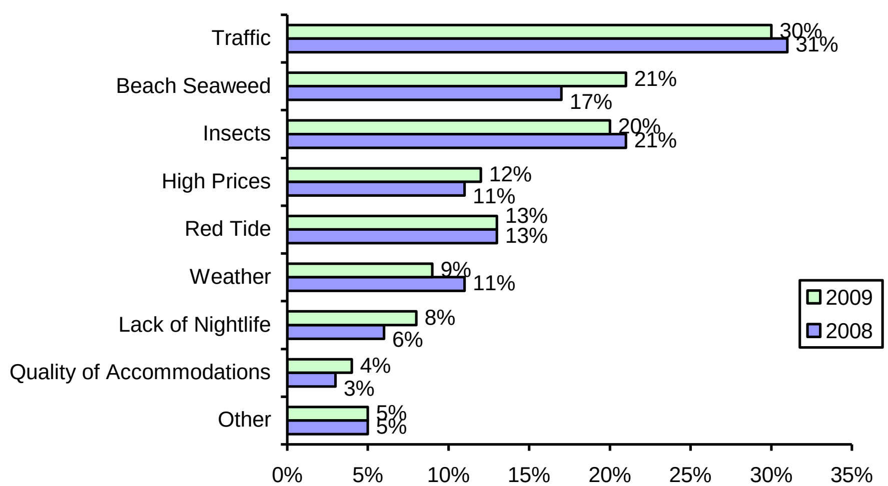


Lee County Experience

Least Liked Features		
	2008	**2009**
Total Respondents	2,429	2,459
Traffic	31%	30%
Beach seaweed	17%	<21%>
Insects	21%	20%
Red Tide	13%	13%
High prices	11%	12%
Weather	<11%>	9%
Lack of nightlife	6%	<8%>
Quality of accommodations	3%	4%
Other	5%	5%
Nothing/no answer	28%	28%

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

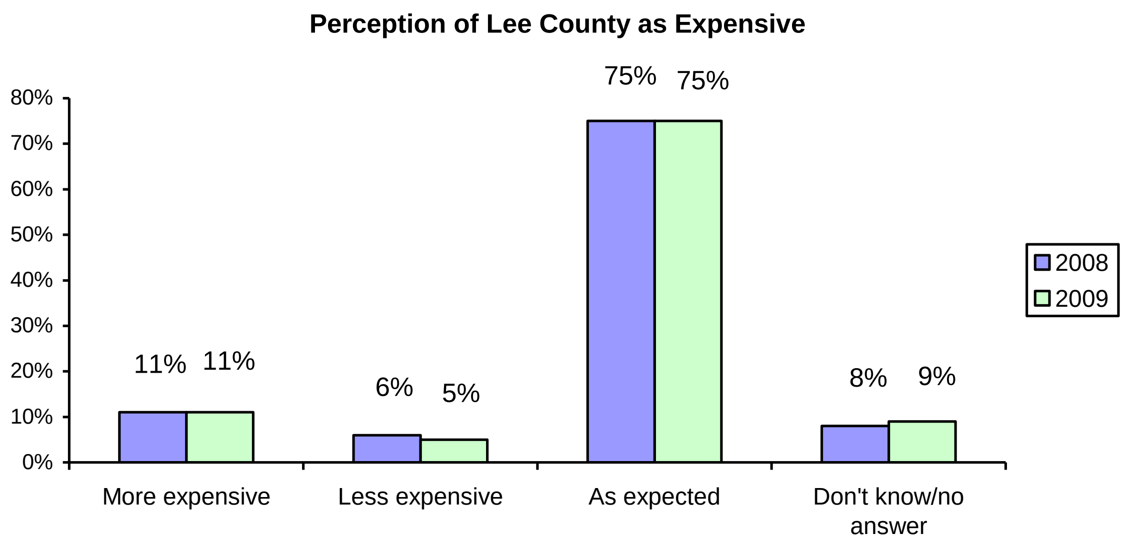
Least Liked Features



Lee County Experience

Perception of Lee County as Expensive		
	2008	**2009**
Total Respondents	2,429	2,459
More expensive	11%	11%
Less expensive	6%	5%
As expected	75%	75%
Don't know/no answer	8%	9%

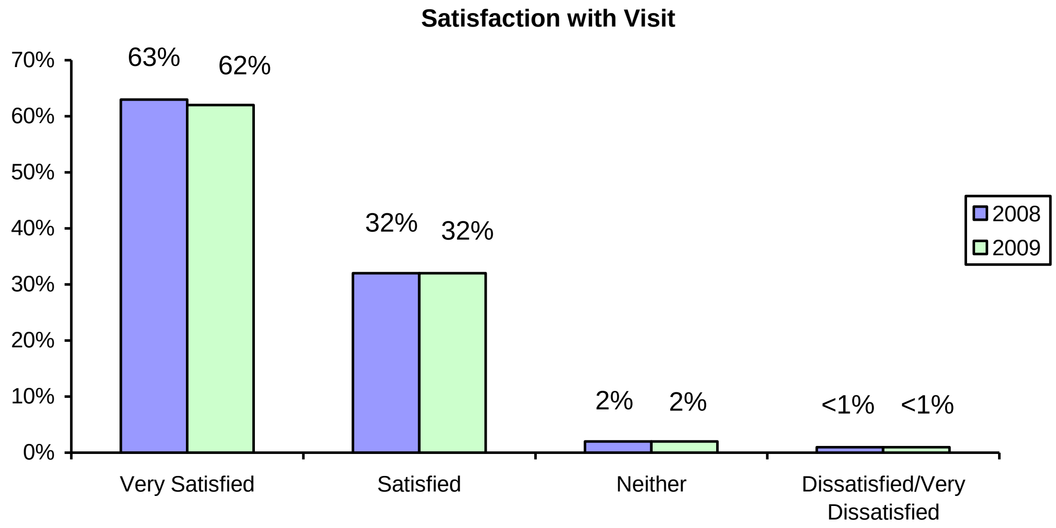
Q31: From your experience, would you say that our area is more expensive, less expensive, or as expensive as you had expected?



Lee County Experience

Satisfaction with Visit		
	2008	**2009**
Total Respondents	2,429	2,459
Satisfied	95%	94%
Very Satisfied	63%	62%
Satisfied	32%	32%
Neither	2%	2%
Dissatisfied/Very Dissatisfied	<1%	<1%
Don't know/no answer	3%	3%

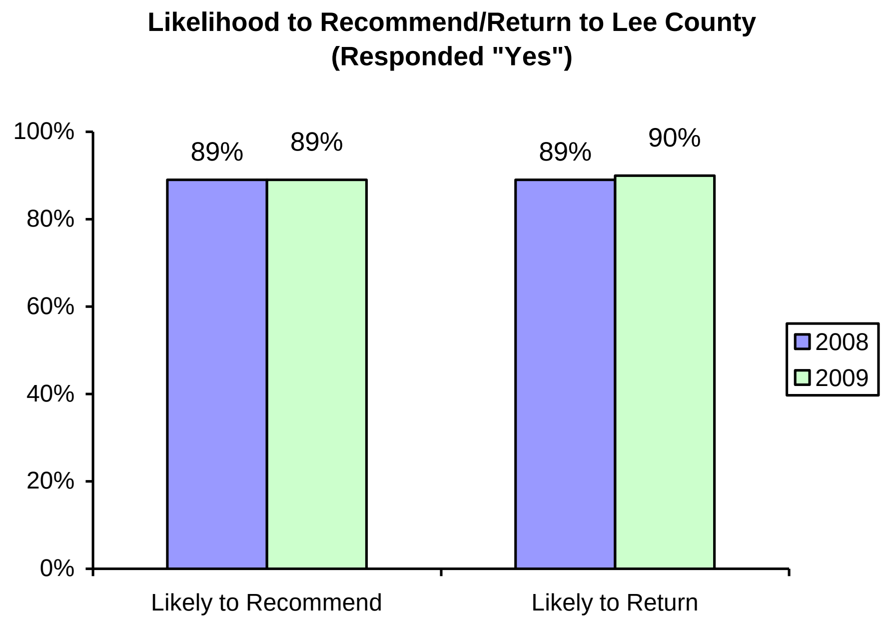
Q33: How satisfied are you with your stay in Lee County?



Future Plans

Likelihood to Recommend/Return to Lee County		
	2008	2009
Total Respondents	2,429	2,459
Likely to Recommend Lee County	89%	89%
Likely to Return to Lee County	89%	90%
Base: Total Respondents Planning to Return	2,150	2,202
Likely to Return Next Year	56%	<60%>

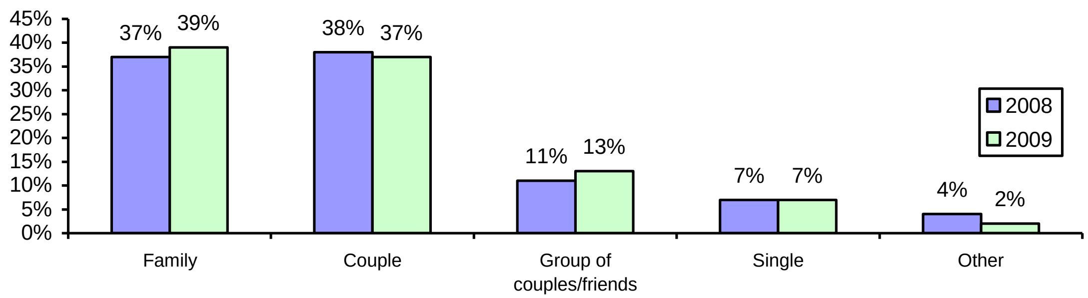
Q32: Would you recommend Lee County to a friend over other vacation areas in Florida?
Q35: Will you come back to Lee County?
Q36: Will you come back next year?



Visitor and Travel Party Demographic Profile

Travel Party		
	2008	**2009**
Total Respondents	2,429	2,459
Couple	38%	37%
Family	37%	39%
Group of couples/friends	11%	<13%>
Single	7%	7%
Other	<4%>	2%
Mean travel party size	3.2	<3.3>
Mean adults in travel party	2.6	<2.7>

Travel Party

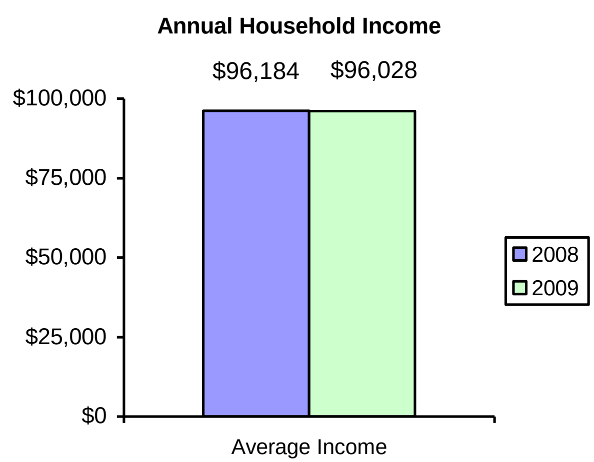


Travel Parties with Children		
	2008	**2009**
Total Respondents	2429	2459
Traveling with any Children (net)	30%	30%
Any younger than 6	12%	13%
Any 6 – 11 years old	14%	13%
Any 12 – 17 years old	15%	15%

Q22: On this trip, are you traveling:
Q23: Including yourself, how many people are in your immediate travel party?
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		
	2008	**2009**
Total Respondents	2,429	2,459
Travel Patterns		
Vacations per year (mean)	2.8	2.8
Short getaways per year (mean)	<4.3>	3.9
Age of respondent (mean)	<48.7>	47.6
Annual household income (mean)	$96,184	$96,028
Marital Status		
Married	72%	70%
Single	14%	<16%>
Other	12%	11%



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

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Visitor Origin and Visitation Estimates

Total Visitation					
	%		Visitor Estimates		% Change
	2008	2009	2008	2009	2008-2009
Paid Accommodations	44%	43%	2,171,249	2,070,095	-4.7%
Friends/Relatives	56%	57%	2,739,821	2,751,004	0.4%
Total Visitation			*4,911,070*	*4,821,099*	-1.8%
Visitor Origin – Visitors Staying in Paid Accommodations					
	2008	**2009**	**2008**	**2009**	
United States	76%	73%	1,642,609	1,517,626	-7.6%
Germany	6%	8%	129,194	175,725	36.0%
United Kingdom	6%	6%	122,602	123,806	1.0%
Canada	6%	5%	138,422	113,156	-18.3%
Scandinavia	1%	2%	22,411	38,606	72.3%
BeNeLux	2%	2%	36,913	34,613	-6.2%
Ireland	<1%	1%	6,592	23,963	263.5%
France	1%	1%	14,501	15,975	10.2%
Switzerland	1%	1%	13,183	11,981	-9.1%
Austria	1%	<1%	13,183	3,994	-69.7%
Other Europe	<1%	<1%	6,592	3,994	-39.4%
Other/No Answer	1%	<1%	25,048	6,656	-73.4%
U.S. Region (Paid Accommodations)					
	2008	**2009**	**2008**	**2009**	
Midwest	36%	42%	590,601	631,013	6.8%
Northeast	20%	23%	334,850	342,131	2.2%
South (including Florida)	22%	23%	366,489	347,456	-5.2%
Florida	10%	9%	167,425	142,444	-14.9%
West	5%	2%	80,417	34,613	-57.0%
No Answer	16%	11%	268,934	163,744	-39.1%

Top DMAs (Paid Accommodations)		
Indianapolis	6%	93,188
New York	6%	83,869
Boston	5%	73,219
Chicago	5%	73,219
Minneapolis-St. Paul	4%	53,250
Detroit	3%	47,925
Philadelphia	3%	47,925
Cincinnati	3%	41,269
Cleveland	3%	41,269
Miami	3%	38,606

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Occupancy Data Analysis
July 2008 – June 2009

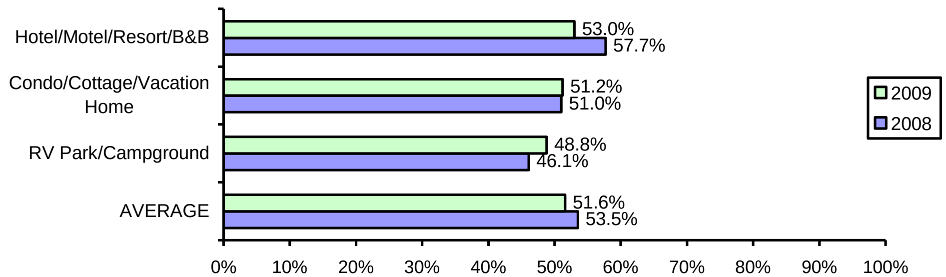
Property managers were interviewed each month during the July 2008 through June 2009 season to provide data for that specific month. Results shown on the following pages are a combination of the samples interviewed in each of the twelve months. Therefore, base sizes shown do not reflect total number of properties but rather total number of completed interviews, as most properties participated during two or more months.

Occupancy/Daily Rates

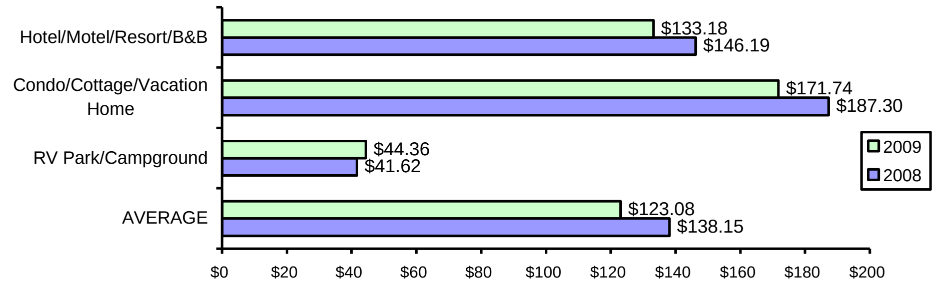
	Average Occupancy Rate - %			Average Daily Rate - $			RevPAR - $		
	2008	2009	% Change	2008	2009	% Change	2008	2009	% Change
Total Responses	1,603	1,730		1,592	1,751		1,603/1,592	1,730/1,751	
Hotel/Motel/Resort/B&B	57.7%	53.0%	-8.1%	$146.19	$133.18	-8.9%	$84.40	$70.63	-16.3%
Condo/Cottage/Vacation Home	51.0%	51.2%	0.4%	$187.30	$171.74	-8.3%	$95.56	$87.96	-8.0%
RV Park/Campground	46.1%	48.8%	5.9%	$41.62	$44.36	6.6%	$19.20	$21.64	12.7%
AVERAGE	53.5%	51.6%	-3.6%	$138.15	$123.08	-10.9%	$73.85	$63.48	-14.0%

Q16: What was your overall average occupancy rate for July 2008 - June 2009?
Q17: What was your average daily rate (ADR) July 2008 - June 2009?

Average Occupancy Rate



Average Daily Rate



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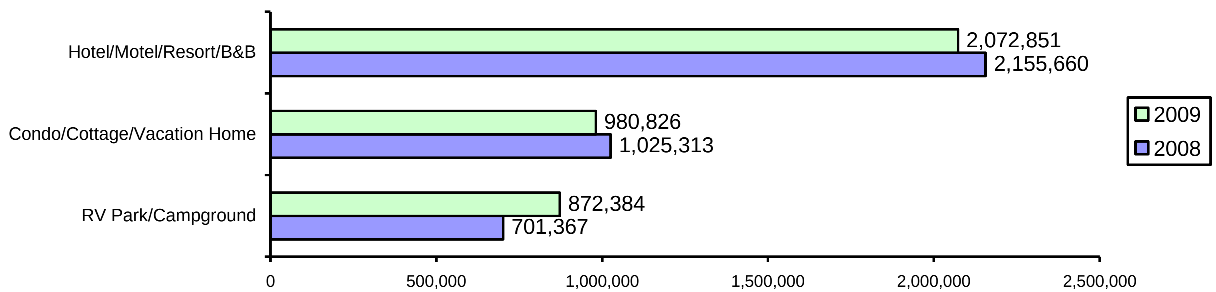
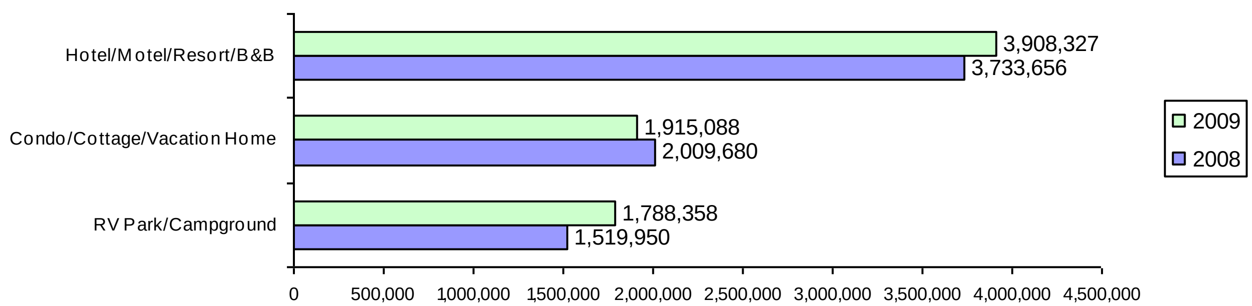
Room/Unit/Site Nights

	Occupied Room Nights			Available Room Nights		
	2008	2009	% Change	2008	2009	% Change
Hotel/Motel/Resort/B&B	2,155,660	2,072,851	-3.8%	3,733,656	3,908,327	4.7%
Condo/Cottage/Vacation Home	1,025,313	980,826	-4.3%	2,009,680	1,915,088	-4.7%
RV Park/Campground	701,367	872,384	24.4%	1,519,950	1,788,358	17.7%
Total	**3,882,340**	**3,926,061**	**1.1%**	**7,263,286**	**7,611,773**	**4.8%**

Occupied Room Nights



Available Room Nights

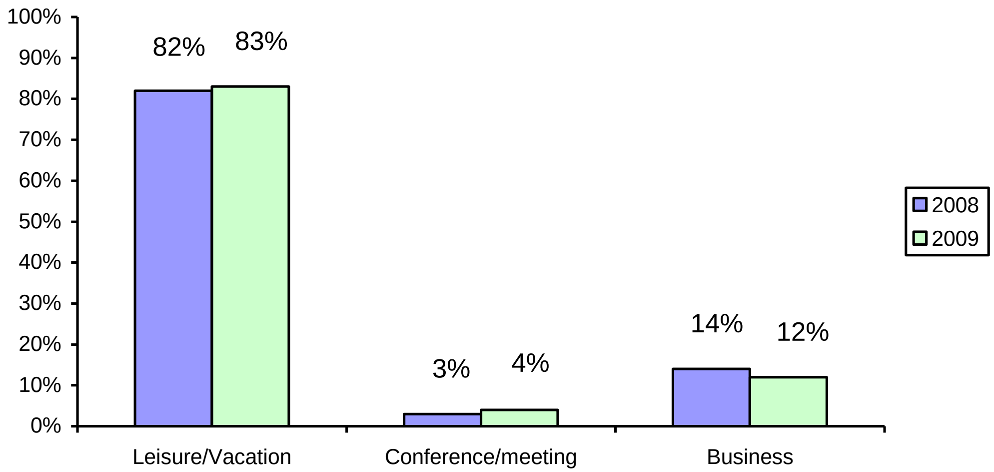


Lodging Management Estimates

Guest Profile		
	2008	**2009**
Total Responses	1,465	1,515
Purpose of Visit		
Leisure/Vacation	82%	83%
Conference/meeting	3%	4%
Business	<14%>	12%
Total Responses	1523	1661
Average guests per room	<2.6>	2.5
Total Responses	1512	1641
Average length of stay in nights	6.9	7.1

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

Purpose of Visit

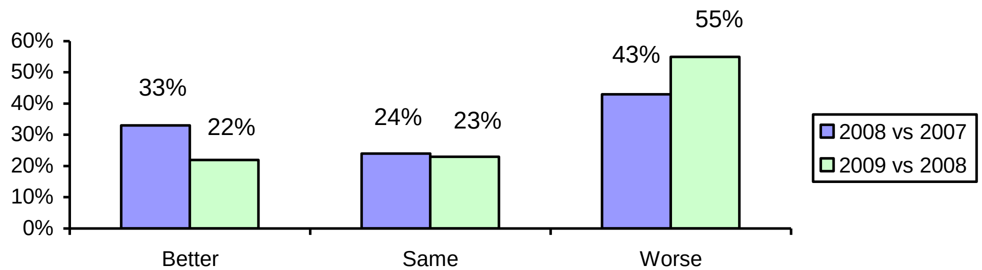


Occupancy Barometer

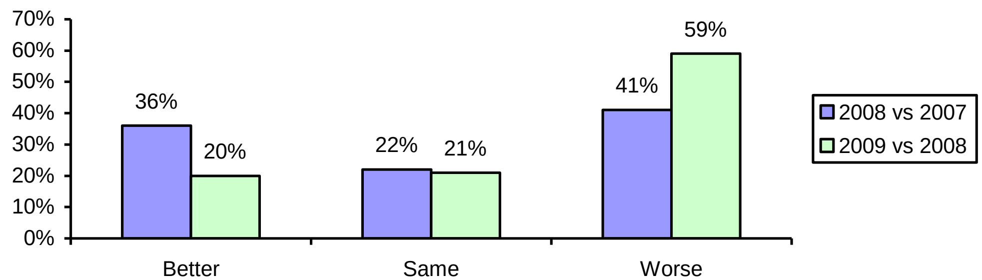
	Occupancy		Revenue	
	2008	2009	2008	2009
Total Responses	1,553	1,682	1,508	1,640
Better than prior year	<33%>	22%	<36%>	20%
Same as prior year	24%	23%	22%	21%
Worse than prior year	43%	<55%>	41%	<59%>

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

Annual Occupancy



Annual Revenue

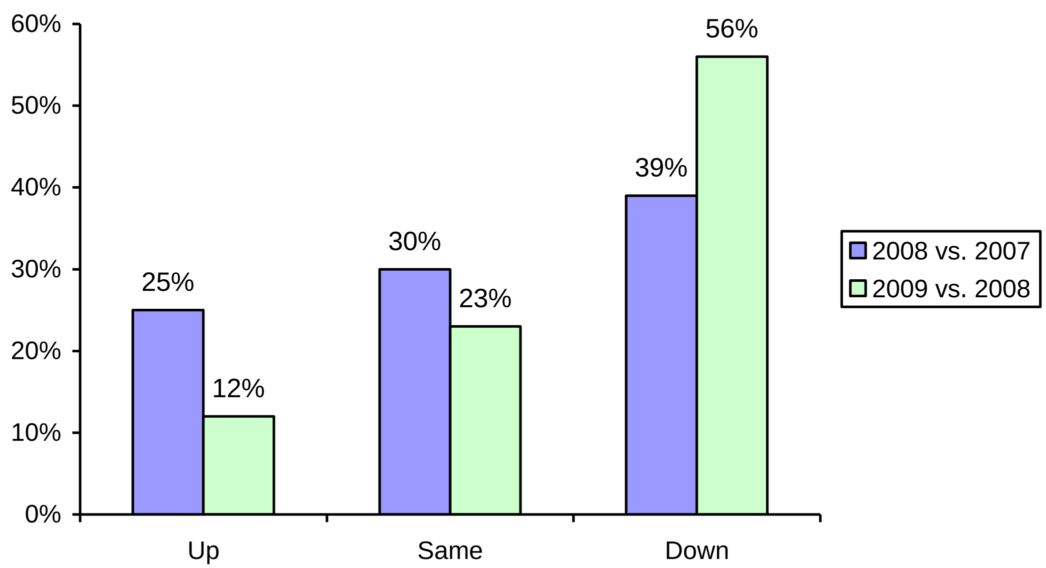


Occupancy Barometer

Level of Reservations for Next 3 Months Compared to Last Year		
	2008	**2009**
Total Responses	1,537	1,660
Up	<25%>	12%
Same	<30%>	23%
Down	39%	<56%>

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

Level of Reservations for Next 3 Months Compared to Last Year

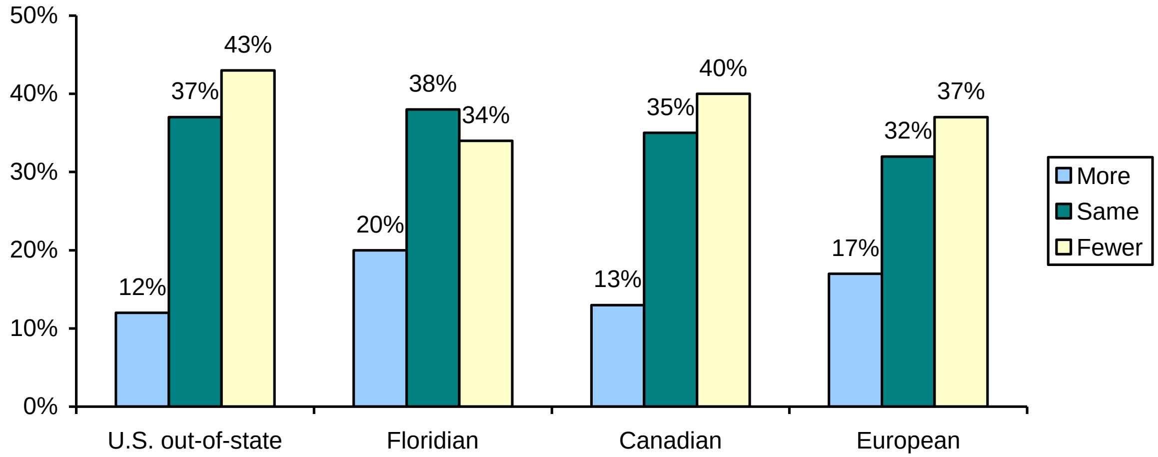


Occupancy Barometer

Origin of Guests for Next 3 Months Compared to Last Year								
Total Responses (1303/1359 Minimum)	**More**		**Same**		**Fewer**		**Not Applicable**	
	2008	**2009**	**2008**	**2009**	**2008**	**2009**	**2008**	**2009**
U.S. out-of-state	<18%>	12%	<49%>	37%	26%	<43%>	7%	8%
Floridian	18%	20%	<52%>	38%	23%	<34%>	8%	8%
Canadian	<20%>	13%	<45%>	35%	21%	<40%>	14%	12%
European	<22%>	17%	<44%>	32%	19%	<37%>	15%	14%

Q27: Now thinking about the specific origins of your guests, for (the next three months) 2009, do you expect more, the same, or fewer guests from each of the following areas than you had at the same time last year?

Origin of Guests for Next 3 Months Compared to Last Year
July 2008 - June 2009



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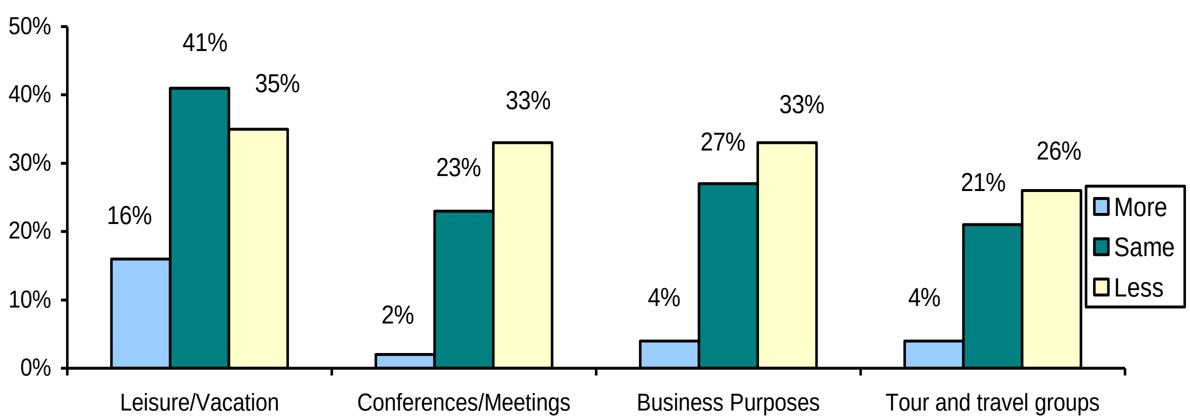
Occupancy Barometer

Type of Travelers for Next 3 Months Compared to Last Year								
Total Responses (1165/1188 Minimum)	More		Same		Less		Not Applicable	
	2008	2009	2008	2009	2008	2009	2008	2009
Leisure/vacation	<24%>	16%	<48%>	41%	22%	<35%>	6%	7%
Conferences/Meetings	<5%>	2%	<38%>	23%	21%	<33%>	36%	<42%>
Business Purposes	5%	4%	<41%>	27%	22%	<33%>	32%	<36%>
Tour and travel groups	5%	4%	<31%>	21%	22%	<26%>	42%	<48%>

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

Type of Travelers for Next 3 Months Compared to Last Year



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Economic Impact Analysis

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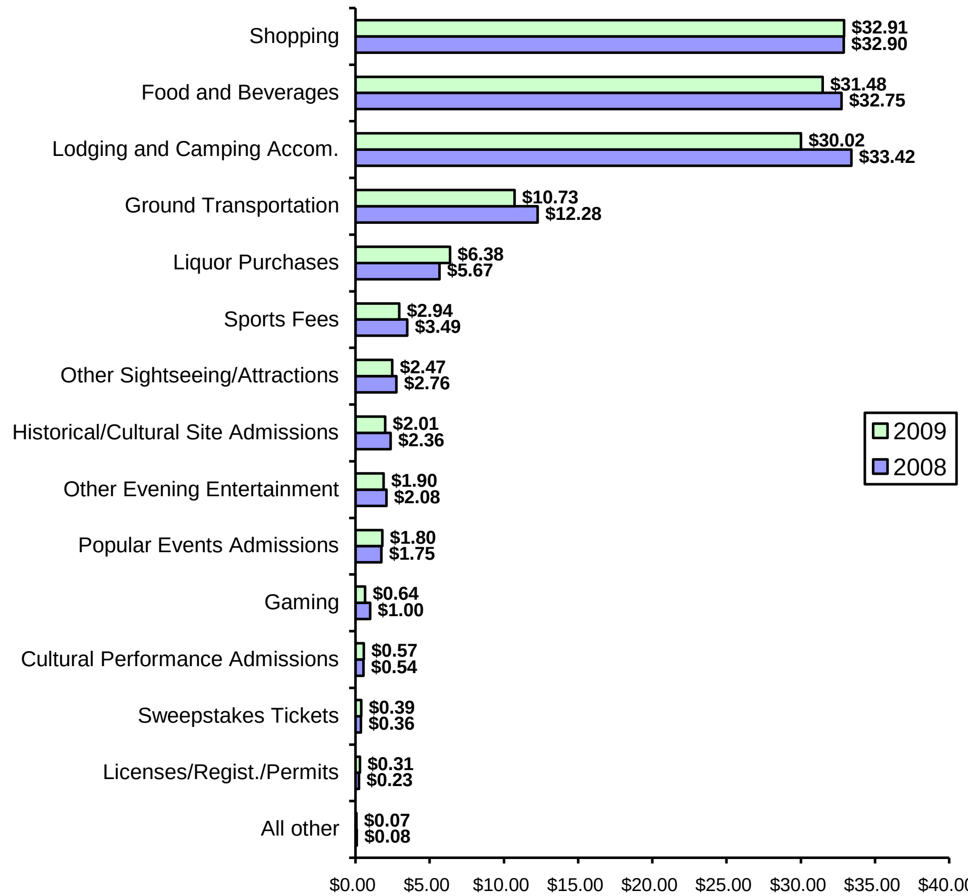
Average Expenditures

Average Expenditures per Person per Day



Average Expenditures per Person per Day			
	2008	2009	% Change
TOTAL	$131.68	$124.62	-5.4%
Shopping NET	$32.90	$32.91	0.03%
Food and Beverages	$32.75	$31.48	-3.9%
Lodging and Camping Accommodations	$33.42	$30.02	-10.2%
Ground Transportation	$12.28	$10.73	-12.6%
Liquor Purchases	$5.67	$6.38	12.5%
Sport Fees	$3.49	$2.94	-15.8%
Other Sightseeing/Attractions	$2.76	$2.47	-10.5%
Historic/Cultural Site Admissions	$2.36	$2.01	-14.8%
Other Evening Entertainment	$2.08	$1.90	-8.7%
Popular Events Admissions	$1.75	$1.80	2.9%
Gaming	$1.00	$0.64	-36.0%
Cultural Performance Admissions	$0.54	$0.57	5.6%
Sweepstakes Tickets	$0.36	$0.39	8.3%
Licenses/Registrations/Permits	$0.23	$0.31	34.8%
All other	$0.08	$0.07	-12.5%

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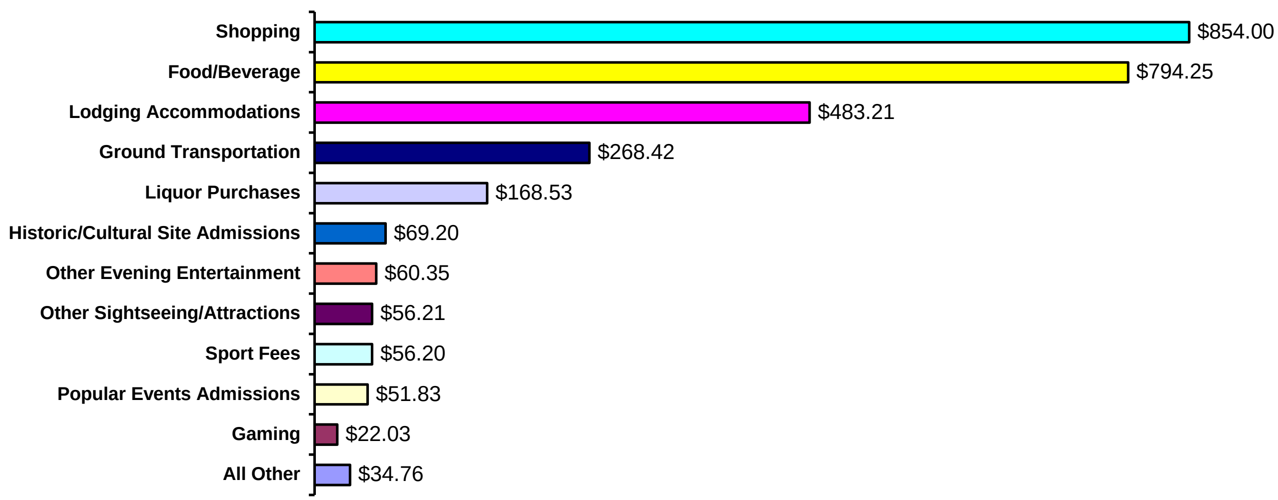
Total Visitor Expenditures by Spending Category

	TOTAL EXPENDITURES		
	2008	2009	% Change
TOTAL	$2,956,459,166	$2,918,990,058	-1.3%
Shopping	$833,085,598	$853,998,690	2.5%
Food and Beverages	$786,027,728	$794,249,631	1.0%
Lodging Accommodations	$536,364,058	$483,211,438	-9.9%
Ground Transportation	$289,246,723	$268,417,084	-7.2%
Liquor Purchases	$133,730,900	$168,527,320	26.0%
Historic/Cultural Site Admissions	$68,814,415	$69,199,082	0.6%
Other Evening Entertainment	$60,923,011	$60,348,003	-0.9%
Other Sightseeing/Attractions	$67,065,206	$56,209,013	-16.2%
Sports Fees	$74,735,376	$56,199,760	-24.8%
Popular Events Admissions	$57,157,270	$51,825,068	-9.3%
Gaming	$18,926,382	$22,029,264	16.4%
All Other	$30,382,499	$34,775,705	14.5%

Total Expenditures
(Millions)

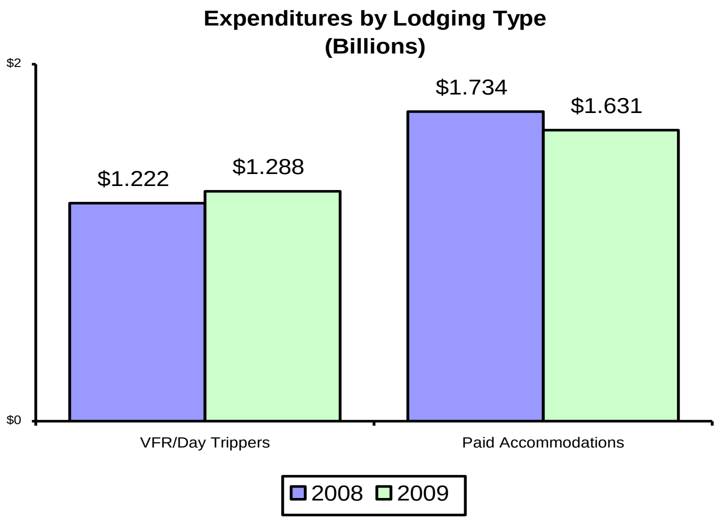


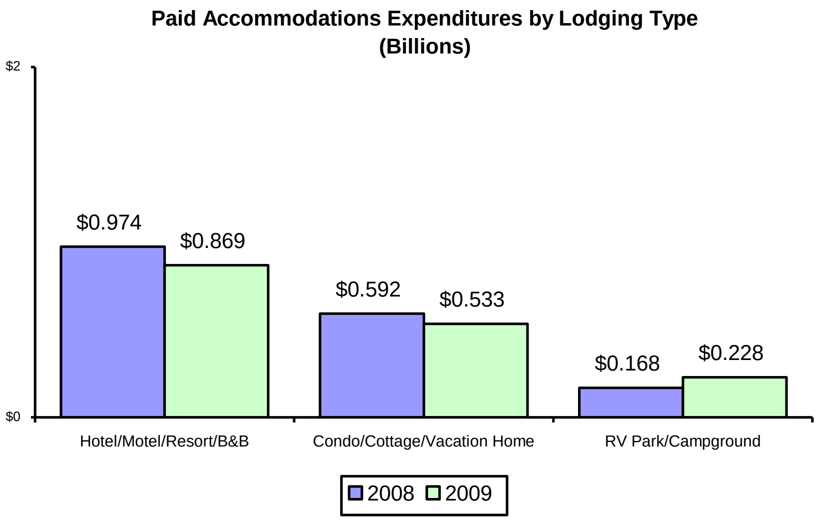
Total Visitor Expenditures by Spending Category

	ALL PROPERTIES					
	Staying in Paid Accommodations			Visiting Friends and Relatives/ Day Trippers		
	2008	2009	% Change	2008	2009	% Change
TOTAL	$1,734,147,871	$1,630,718,163	-6.0%	$1,222,311,295	$1,288,271,895	5.4%
Lodging Accommodations	$536,364,058	$483,211,438	-9.9%	--	--	--
Shopping	$389,672,447	$413,271,478	6.1%	$443,413,151	$440,727,212	-0.6%
Food and Beverages	$395,411,736	$363,363,128	-8.1%	$390,615,992	$430,886,503	10.3%
Ground Transportation	$160,139,288	$134,480,072	-16.0%	$129,107,435	$133,937,012	3.7%
Liquor Purchases	$62,884,199	$72,936,062	16.0%	$70,846,701	$95,591,258	34.9%
Sport Fees	$49,133,027	$34,120,291	-30.6%	$25,602,349	$22,079,469	-13.8%
Other Sightseeing/Attractions	$36,646,132	$30,407,849	-17.0%	$30,419,074	$25,801,164	-15.2%
Historic/Cultural Site Admissions	$29,419,132	$28,492,763	-3.1%	$39,395,283	$40,706,319	3.3%
Other Evening Entertainment	$27,004,946	$22,317,871	-17.4%	$33,918,065	$38,030,132	12.1%
Popular Events Admissions	$20,328,360	$20,884,559	2.7%	$36,828,910	$30,940,509	-16.0%
Gaming	$12,378,800	$11,167,477	-9.8%	$6,547,582	$10,861,787	65.9%
All Other	$14,765,746	$16,065,175	8.8%	$15,616,753	$18,710,530	19.8%

Total Visitor Expenditures by Lodging Type

Total Expenditures by Lodging Type					
	2008	2009	% Change	2008	2009
TOTAL	$2,956,459,166	$2,918,990,085	-1.3%	100%	100%
Visiting Friends & Relatives/ Day Trippers	$1,222,311,295	$1,288,271,895	5.4%	41%	44%
Paid Accommodations	$1,734,147,871	$1,630,718,163	-6.0%	59%	56%
Hotel/Motel/Resort/B&B	*$974,144,616*	*$869,065,386*	-10.8%	33%	30%
Condo/Cottage/Vacation Home	*$591,699,017*	*$533,335,167*	-9.9%	20%	18%
RV Park/Campground	*$168,304,238*	*$228,317,610*	35.7%	6%	8%





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.

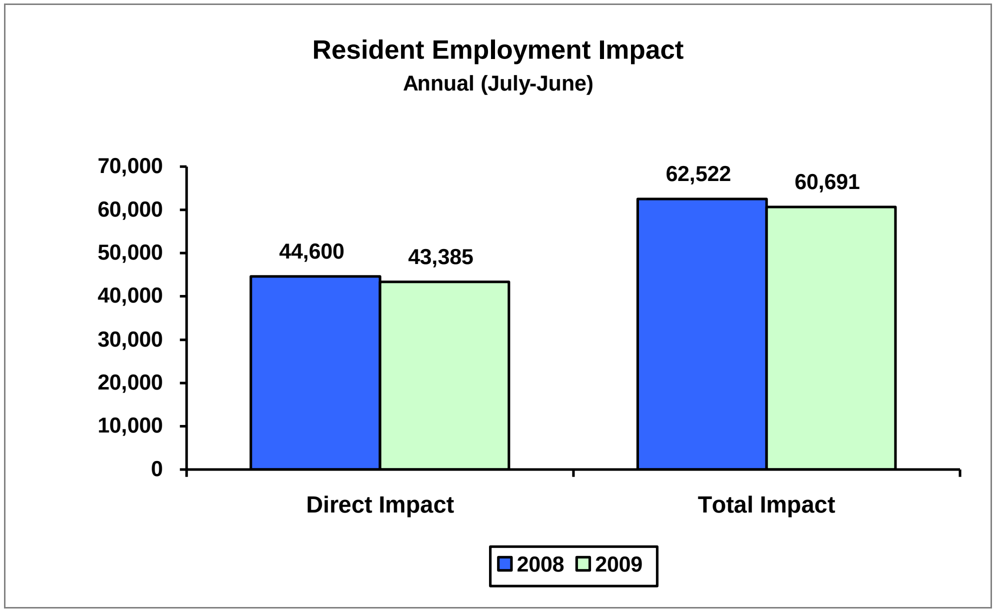
Impact on Jobs for Lee County Residents

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.

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

<u>Total employment</u> includes the number of employees necessary to produce the direct output purchased with the visitor expenditures <u>PLUS</u> 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.)



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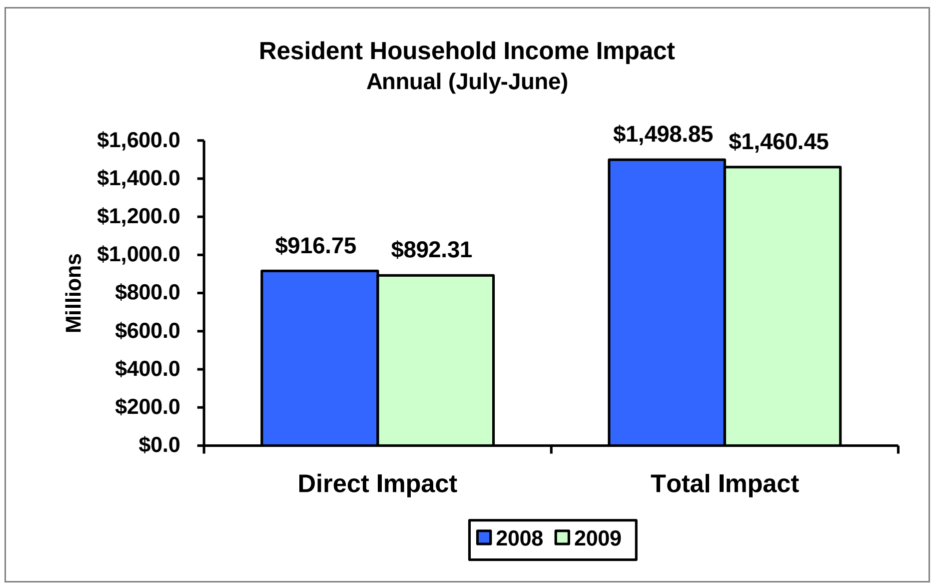
Impact on Household Income for Lee County Residents

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.)



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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.

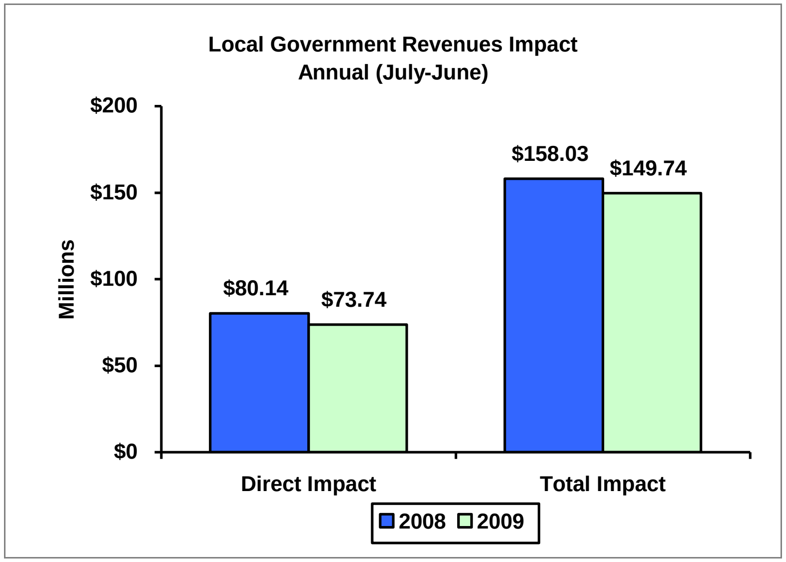
The gross government revenues accruing to governments as a result of producing the output purchased with visitor expenditures is the government revenue impact.

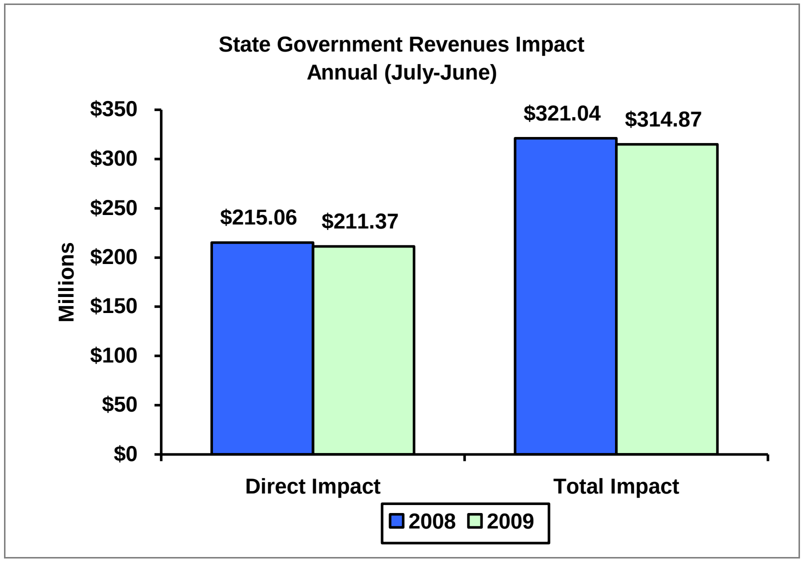
Local government revenue impact is a result of revenues provided to the local (Lee County) government. This includes the bed tax, local property tax, any local-option sales tax, and any operating income for local government agencies.

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).





Direct and Total Impact of Visitor Expenditures

Impact of Estimated Visitor Expenditures					
	Annual	Summer Jul-Sep08	Fall Oct-Dec08	Winter Jan-Mar09	Spring Apr-Jun09
Direct Employment Impact	43,386	7,867	10,816	15,324	9,379
Total Employment Impact	60,690	11,020	15,135	21,477	13,058
Direct Household Income Impact	$892,312,882	$160,814,803	$218,773,192	$313,847,382	$198,877,504
Total Household Income Impact	$1,460,444,672	$263,282,374	$359,089,429	$513,629,540	$324,443,329
Direct Impact on Local Government Revenues	$73,734,992	$12,868,935	$16,130,971	$27,204,078	$17,531,008
Total Impact on Local Government Revenues	$149,737,914	$26,590,504	$34,869,761	$53,876,409	$34,401,240
Direct Impact on State Government Revenues	$211,371,016	$37,617,757	$52,228,587	$74,902,981	$46,621,691
Total Impact on State Government Revenues	$314,864,985	$56,287,928	$77,785,828	$111,243,624	$69,547,605

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Appendix
July 2008 – June 2009

Visitor Profile Interviewing Locations

City	Event/Location	City	Event/Location
Bonita Springs	Bonita Beach	Fort Myers Beach	The Pier
Bonita Springs	Dog Beach	Fort Myers Beach	Times Square
Cape Coral	Cape Coral Art Festival	Fort Myers Beach	Winward Passage
Cape Coral	Cape Coral Yacht Club Beach	Sanibel	Casa Ybel Resort
Fort Myers	Best Western	Sanibel	Coquina Beach Resort
Fort Myers	City of Palms Park	Sanibel	Donax Villas
Fort Myers	Clarion	Sanibel	Gulf Breeze Cottages
Fort Myers	Edison Estates	Sanibel	Gulf Harbor
Fort Myers	Hammond Stadium	Sanibel	Holiday Inn
Fort Myers	Hilton Garden Inn	Sanibel	Island Beach Club
Fort Myers	Holiday Inn	Sanibel	Lighthouse Beach
Fort Myers	Manatee Park	Sanibel	Loggerhead Cay
Fort Myers	Shell Factory	Sanibel	Pelican Roost
Fort Myers	Six Mile Cypress Slough Preserve	Sanibel	Periwinkle Campground
Fort Myers	Summerlin Square Trolley	Sanibel	Pointe Santos
Fort Myers Beach	Bel-Air Beach Club	Sanibel	Sand Dollar
Fort Myers Beach	Best Western	Sanibel	Sanibel Arms
Fort Myers Beach	Bowditch Point Beach	Sanibel	Sanibel Beach Club
Fort Myers Beach	Cane Palm Condos	Sanibel	Sanibel Cottages
Fort Myers Beach	Casa Playa Resort	Sanibel	Sanibel Inn
Fort Myers Beach	Diamond Head Beach Resort	Sanibel	Sanibel Moorings
Fort Myers Beach	Gateway Villas	Sanibel	Sanibel Surfside
Fort Myers Beach	Kona Beach Club	Sanibel	Sea Shells at Sanibel
Fort Myers Beach	Lani Kai Island Resort	Sanibel	Song of the Sea
Fort Myers Beach	Outrigger Beach Resort	Sanibel	Sundial Beach and Golf Resort
Fort Myers Beach	Pink Shell Resort	Sanibel	Tarpon Beach
Fort Myers Beach	Royal Beach Club	Sanibel	Tarpon Beach Club Resort
Fort Myers Beach	Sand Castle Beach Resort	Sanibel	Tortuga Beach Club
Fort Myers Beach	Sand Sculptures Festival		

Seasonal Comparisons: Key Statistics

Lee County Seasonal Comparisons

	Summer-08		YOY %	Fall-08		YOY %	Winter-09		YOY %	Spring-09		YOY %
	%	#	Change	%	#	Change	%	#	Change			Change
Visitation												
Total Visitation		1,048,538	-13.9%		1,106,654	1.1%		1,350,163	4.3%		1,315,744	0.9%
Visiting Friends/Relatives	57%	594,633	-14.3%	58%	638,058	8.0%	59%	794,411	3.9%	55%	723,902	4.8%
Paid Accommodations	43%	453,905	-13.3%	42%	468,596	-7.1%	41%	555,752	4.9%	45%	591,842	-3.5%
Hotel/Motel/Resort	*33%*	*343,574*	-9.8%	*29%*	*321,289*	-10.2%	*29%*	*396,942*	6.0%	*32%*	*422,515*	0.7%
Condo/Cottage/Vacation Home	*9%*	*91,654*	-10.6%	*9%*	*98,500*	-9.3%	*8%*	*111,523*	-7.6%	*9%*	*120,174*	-16.5%
RV Park/Campground	*2%*	*18,677*	-53.5%	*4%*	*48,807*	28.0%	*4%*	*47,287*	36.3%	*4%*	*49,153*	-1.4%
Visitor Origin by Country												
United States	63%	283,988	-21.0%	63%	297,326	-14.4%	82%	458,462	6.1%	82%	486,054	-5.3%
United Kingdom	10%	47,529	-10.2%	9%	43,845	33.0%	2%	13,327	-9.0%	2%	17,155	-18.5%
Germany	15%	67,729	73.7%	12%	54,807	24.7%	2%	11,995	22.9%	6%	37,169	4.4%
Canada	3%	13,071	-47.9%	6%	27,403	-19.5%	10%	55,975	9.2%	3%	18,584	-18.0%
Other/No Answer	9%	42,776	-9.7%	9%	43,844	-2.7%	3%	15,992	-31.0%	6%	32,881	69.2%
Visitor Origin by US Region												
Northeast	12%	33,271	-44.4%	19%	56,177	-36.1%	30%	138,605	29.1%	25%	120,084	68.6%
Midwest	31%	89,117	56.1%	36%	108,243	-15.8%	48%	219,902	9.2%	45%	221,583	10.4%
South (incl. Florida)	43%	122,388	-18.6%	20%	58,917	-0.7%	12%	55,975	39.0%	22%	104,359	-22.3%
West	1%	3,565	-91.2%	3%	8,221	-46.6%	2%	7,996	9.2%	3%	15,725	-11.7%
No Answer	13%	35,647	-28.9%	22%	65,768	17.4%	8%	35,984	-52.4%	5%	25,732	-71.1%
In-State Visitors	23%	64,165	-35.1%	8%	23,293	-3.6%	1%	6,664	9.2%	9%	42,887	-8.7%
Total Visitor Expenditures		$523,649,638	-19.4%		$721,896,282	12.1%		$1,023,444,885	4.0%		$649,999,253	-4.3%
Paid Accommodations		$277,270,224	-13.7%		$401,250,140	7.4%		$611,882,182	-4.0%		$340,315,617	-15.3%
Visiting Friends/Relatives		$246,379,414	-24.9%		$320,646,142	18.7%		$411,562,703	18.7%		$309,683,636	11.8%
Average Expenditures per Person per Day		$113.66	-11.5%		$117.49	-14.5%		$130.25	-6.5%		$128.40	0.5%

Lee County Seasonal Comparisons

	Summer-08		YOY %	Fall-08		YOY %	Winter-09		YOY %	Spring-09		YOY %
	%	#	Change	%	#	Change	%	#	Change			Change
Visitor Profile Survey												
# of Interviews Completed		608			612			629			610	
Percentage Flying to Lee County	64%			72%			61%			64%		
First-time Visitors	36%			21%			24%			27%		
Repeat Visitors	64%			77%			75%			72%		
Satisfaction with Visit												
Very Satisfied/Satisfied	93%			95%			93%			96%		
Very Satisfied	56%			67%			59%			66%		
Satisfied	36%			28%			34%			29%		
Likely to Return	85%			91%			90%			91%		
Recall of promotions												
Yes	21%			22%			27%			25%		
Average Travel Party Size												
Visitors		3.6			3.1			2.8			3.7	
Management Estimate		2.4			2.5			2.5			2.6	
Average Length of Stay												
Visitors		8.2			9.0			9.6			7.9	
Management Estimate		5.9			7.0			9.5			5.7	
Traveling with children	39%			23%			18%			41%		
Average Age		44.3			48.8			51.3			46.1	
Average Household Income		$94,972			$95,563			$92,599			$100,770	

Lee County Seasonal Comparisons

	Summer-08		YOY %	Fall-08		YOY %	Winter-09		YOY %	Spring-09		YOY %
	%	#	Change	%	#	Change	%	#	Change			Change
Occupancy Survey												
# of Interviews Completed												
Total		429			430			470			480	
Hotel/Motel/Resort/B&B		250			255			271			280	
Condo/Cottage/Vacation Home		125			115			136			140	
RV Park/Campground		54			60			63			60	
Available Roomnights												
Hotel/Motel/Resort/B&B		993,533	8.4%		934,769	0.7%		938,179	1.5%		1,041,846	7.9%
Condo/Cottage/Vacation Home		498,917	1.3%		508,598	5.4%		454,943	-7.6%		452,630	-16.5%
RV Park/Campground		435,296	12.9%		478,318	26.0%		444,286	50.2%		430,458	-6.3%
Total		1,927,746	7.4%		1,921,685	7.4%		1,837,408	7.3%		1,924,934	-2.1%
Occupied Roomnights												
Hotel/Motel/Resort/B&B		445,962	-7.9%		444,216	-9.7%		628,226	0.3%		554,447	0.3%
Condo/Cottage/Vacation Home		173,571	3.5%		215,729	1.2%		346,887	-6.9%		244,639	-10.1%
RV Park/Campground		85,355	-8.4%		226,650	61.2%		399,960	53.3%		160,419	-22.4%
Total		704,888	-5.4%		886,595	4.8%		1,375,073	9.1%		959,505	-7.0%

Lee County Seasonal Comparisons

	Summer-08		YOY %	Fall-08		YOY %	Winter-09		YOY %	Spring-09		YOY %
	%	#	Change	%	#	Change	%	#	Change			Change
Occupancy Rates												
Hotel/Motel/Resort	44.9%		-15.1%	47.5%		-10.4%	67.0%		-1.2%	53.2%		-7.2%
Condo/Cottage/Vacation Home	34.8%		2.1%	42.4%		-4.1%	76.3%		0.9%	54.1%		7.8%
RV Park/Campground	19.6%		-19.0%	47.4%		28.1%	90.0%		2.0%	37.3%		-17.1%
Average	36.6%		-11.8%	46.1%		-2.5%	74.8%		1.6%	49.9%		-5.0%
Average Daily Rates												
Hotel/Motel/Resort		$113.82	-2.8%		$124.02	0.2%		$153.57	-17.8%		$132.98	-8.6%
Condo/Cottage/Vacation Home		$156.02	4.2%		$150.12	-2.0%		$197.64	-15.9%		$165.23	-4.0%
RV Park/Campground		$30.89	-7.5%		$42.58	9.9%		$50.34	9.4%		$39.16	-6.2%
Average		$114.17	0.1%		$109.55	-6.4%		$134.66	-21.6%		$125.52	-4.7%
RevPAR												
Hotel/Motel/Resort		$51.09	-17.5%		$58.94	-10.2%		$102.83	-18.8%		$70.77	-15.1%
Condo/Cottage/Vacation Home		$54.28	6.5%		$63.68	-5.9%		$150.69	-15.2%		$89.31	3.4%
RV Park/Campground		$6.06	-24.9%		$20.18	40.6%		$45.32	11.7%		$14.59	-22.4%
Average		$41.75	-11.8%		$50.54	-8.6%		$100.78	-20.3%		$62.57	-9.5%

Lee County Seasonal Comparisons

	Summer-08		YOY %	Fall-08		YOY %	Winter-09		YOY %	Spring-09		YOY %
	%	#	Change	%	#	Change	%	#	Change			Change
Occupancy Barometer												
Occupancy:												
Current Month vs. Month in Prior Yr												
Better	16%			23%			23%			24%		
Same	23%			22%			25%			22%		
Worse	61%			55%			53%			54%		
Revenue:												
Current Month vs. Month in Prior Yr												
Better	16%			23%			21%			18%		
Same	22%			22%			20%			21%		
Worse	62%			55%			59%			61%		
Reservations:												
Level of Reservations for Next Three Months vs. Last Year												
Up	14%			12%			13%			10%		
Same	27%			24%			21%			21%		
Down	46%			54%			61%			62%		
Origin of Guests for Next Three Months vs. Last Year												
U.S. Out-of State												
More	12%			14%			13%			9%		
Same	38%			36%			39%			36%		
Fewer	42%			41%			42%			45%		
N/A	8%			10%			6%			10%		
Floridian												
More	23%			17%			15%			25%		
Same	42%			43%			37%			30%		
Fewer	29%			33%			39%			35%		
N/A	7%			7%			8%			9%		
Canadian												
More	15%			16%			14%			6%		
Same	40%			30%			39%			33%		
Fewer	32%			42%			37%			47%		
N/A	13%			12%			9%			14%		

Lee County Seasonal Comparisons

	Summer-08		YOY %	Fall-08		YOY %	Winter-09		YOY %	Spring-09		YOY %
	%	#	Change	%	#	Change	%	#	Change			Change
European												
More	25%			21%			15%			11%		
Same	30%			30%			37%			32%		
Fewer	31%			36%			37%			42%		
N/A	15%			14%			12%			14%		
Type of Travelers for Next Three Months vs. Last Year												
Leisure/Vacation												
More	20%			20%			12%			13%		
Same	41%			38%			43%			43%		
Less	31%			34%			40%			35%		
N/A	7%			8%			4%			10%		
Conference/Meetings												
More	4%			3%			3%			1%		
Same	27%			25%			21%			20%		
Less	29%			36%			33%			34%		
N/A	41%			36%			43%			46%		
Business Purposes												
More	5%			3%			5%			3%		
Same	33%			28%			24%			23%		
Less	31%			37%			33%			32%		
N/A	31%			32%			38%			41%		
Tour and Travel Groups												
More	3%			4%			5%			3%		
Same	26%			20%			20%			20%		
Less	23%			30%			25%			27%		
N/A	47%			46%			49%			49%		