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November 2006 Visitor Profile – The Beaches of Fort Myers - Sanibel



*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
and
Lee County Visitor and Convention Bureau

Prepared by:

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Lee County November 2006 Visitor Profile

Executive Summary: November 2006

1. The month of November saw occupancy contractions throughout most of Florida's Gulf Coast beach destinations. In Lee, lodging occupancy dropped by 4.6 points, while ADR surged by 9.4%. Much of this scenario relates to the November national elections, as well as factors such as unseasonably cold weather, water quality issues, and facility renovations. Despite these contractions, compared to November 2005, Lee's tourism industry added \$2.2 million additional dollars to the destination's economic activity level (**Total Economic Impact 2005: \$110,619,835; 2006: \$112,791,855**).
2. November 2006 saw 105,000 visitors staying at commercial lodgings in Lee. The geographic origins of these visitors (by market segment) are as follows:

| <u>Visitor Segments</u> | November | | |
|-------------------------|---------------------------|---------------------------|--------------|
| | <u>2005 Visitor #</u> | <u>2006 Visitor #</u> | <u>% Δ</u> |
| Florida | 12,354 | 12,495 | + 1.1 |
| Southeast | 6,660 | 6,720 | + 0.9 |
| Northeast | 32,442 | 32,445 | 0.0 |
| Midwest | 36,417 | 33,600 | - 7.7 |
| Canada | 2,686 | 2,940 | + 9.5 |
| Europe | 12,891 | 12,390 | - 3.9 |
| Markets of Opportunity | 3,975 | 4,410 | +10.9 |
| Total | 107,425 | 105,000 | - 2.3 |

3. This month, fully 68.9% of travelers to Lee County are repeat visitors to the destination (**2005: 63.2%**) and 49.2% of all visitors say they will come back next year (**2005: 49.7%**). Consumer loyalty born from prior positive experiences at the **Beaches of Fort Myers - Sanibel** is a major stabilizing factor for Lee's tourism industry. Importantly, repeat visitation in this group is driven at better than the 60% level by promotional and Internet information about the destination.

Lee County November 2006 Visitor Profile

4. While some 27.8% of Lee's November visitors drove to the destination, air travel remains the primary mode of transportation for the majority (**2005: 74.9%; 2006: 71.4%**).

5. Lee's November visitors were drawn from the following top DMA's (in rank order):

| <u>November 2005</u> | | | <u>November 2006</u> | | | <u>'05 Rank</u> |
|----------------------|-----------------------|-------|----------------------|-----------------------|-------|-----------------|
| 1. | New York | 11.9% | 1. | New York | 12.5% | 1 |
| 2. | Chicago | 8.4 | 2. | Chicago | 7.1 | 2 |
| 3. | Boston | 6.5 | 3. | Boston | 4.7 | 3 |
| 4. | Miami/Fort Lauderdale | 4.8 | 4. | Miami/Fort Lauderdale | 4.5 | 4 |
| 5. | Indianapolis | 4.1 | 5. | Philadelphia | 4.4 | 6 |
| 6. | Philadelphia | 3.9 | 6. | Minneapolis/St. Paul | 4.2 | 7 |
| 7. | Minneapolis/St. Paul | 3.8 | 7. | Cleveland | 3.9 | 10 |
| 8. | Cincinnati | 3.5 | 8. | Indianapolis | 3.5 | 5 |
| 9. | Detroit | 3.4 | 9. | Tampa/St. Petersburg | 3.3 | -- |
| 10. | Cleveland | 3.2 | 10. | Detroit | 3.2 | 9 |

6. The reservation window lead time remains narrow. November's *MANAGEMENT BAROMETER* documents that nearly two of every five visitors (38.5%) had no reservations or made them within seven (7) days of arriving in Lee (**2005: 13.5%**).

7. This November, almost nine of every ten visitors (89.9%) report Internet access. A majority of these (81.9%) retrieve travel information. Moreover, some 72.8% of the Internet users buy travel services on the Web, with 48.2% of these saying they are booking lodging via the Internet.

The Beaches of Fort Myers - Sanibel:
2006 November Visitor Profile



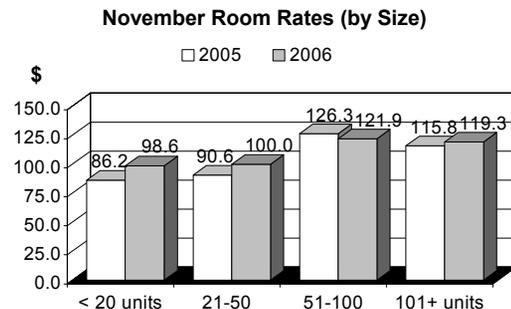
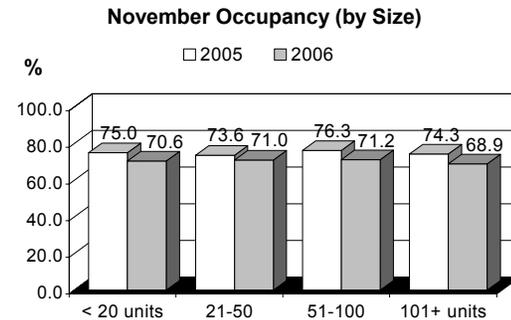
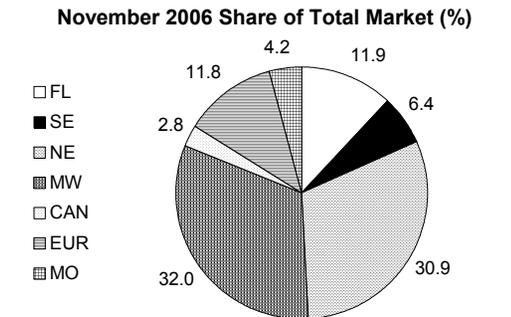
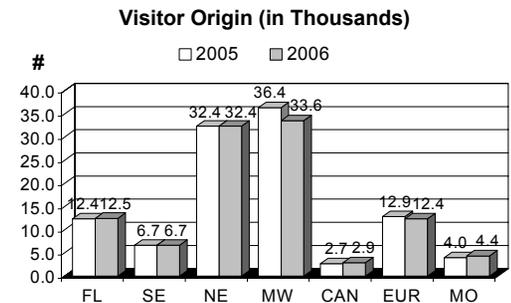
November 2006 Visitor Profile – The Beaches of Fort Myers - Sanibel

| Visitor Volume | Annual | YEAR TO DATE | | % Δ | November | | % Δ |
|------------------|-----------------|-----------------|-----------------|-------|--------------|--------------|-------|
| | 2005 | 2005 | 2006 | 05/06 | 2005 | 2006 | 05/06 |
| Visitors (#) | 2,047,540 | 1,908,625 | 1,932,120 | +1.2 | 107,425 | 105,000 | -2.3 |
| Room Nights | 5,448,463 | 4,936,463 | 5,001,447 | +1.3 | 474,800 | 462,000 | -2.7 |
| Direct Exp. (\$) | \$1,235,214,646 | \$1,140,418,306 | \$1,239,438,750 | +8.7 | \$65,856,900 | \$67,150,000 | +2.0 |

| Visitor Origin | Annual Market Share | | | November 2005 | | November 2006 | | |
|-----------------|---------------------|---------------|---------------|---------------|----------------|---------------|----------------|-------------|
| | 2003 | 2004 | 2005 | % Share | Visitor # | % Share | Visitor # | % Add Vis |
| Florida | 12.6% | 11.4% | 11.4% | 11.5% | 12,354 | 11.9% | 12,495 | +1.1 |
| Southeast | 7.0 | 6.8 | 6.6 | 6.2 | 6,660 | 6.4 | 6,720 | +0.9 |
| Northeast | 28.4 | 28.9 | 28.8 | 30.2 | 32,442 | 30.9 | 32,445 | 0.0 |
| Midwest | 37.9 | 38.5 | 38.1 | 33.9 | 36,417 | 32.0 | 33,600 | -7.7 |
| Canada | 2.3 | 2.3 | 2.5 | 2.5 | 2,686 | 2.8 | 2,940 | +9.5 |
| Europe | 8.4 | 8.9 | 9.7 | 12.0 | 12,891 | 11.8 | 12,390 | -3.9 |
| Markets of Opp. | 3.4 | 3.2 | 2.9 | 3.7 | 3,975 | 4.2 | 4,410 | +10.9 |
| Total | 100.0% | 100.0% | 100.0% | 100.0 | 107,425 | 100.0 | 105,000 | -2.3 |

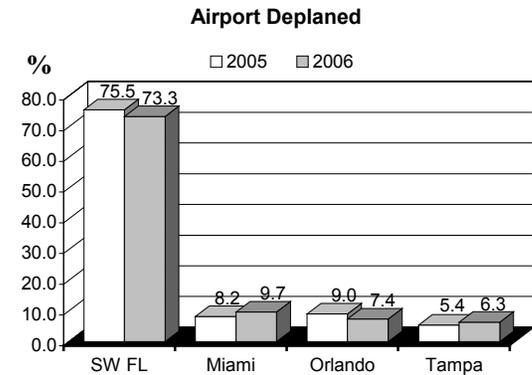
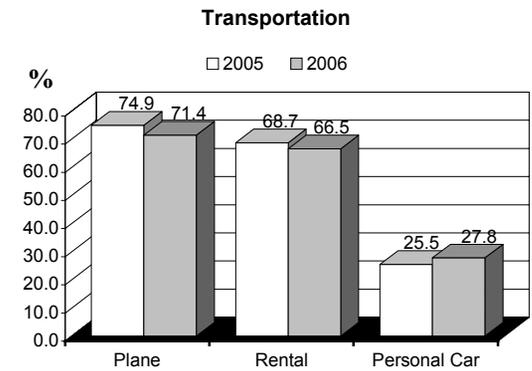
| Occupancy | Winter | May | Jun. | Jul. | Aug. | Spr/Sum | Sept. | Oct. | Nov. |
|---------------------------|--------------|--------------|---------------|--------------|---------------|--------------|--------------|--------------|--------------|
| Occupancy 2004 | 88.0% | 74.4% | 69.3% | 73.4% | 65.8% | 70.7% | 64.0% | 71.3% | 77.2% |
| Occupancy 2005 | 89.1 | 78.4 | 72.2 | 77.4 | 61.6 | 72.4 | 51.0 | 61.2 | 74.6 |
| Occupancy 2006 | 86.3 | 78.0 | 71.2 | 73.7 | 58.8 | 70.4 | 49.8 | 62.8 | 70.0 |
| Δ Points ('05-'06) | -2.8 | -0.4 | -1.0 | -3.7 | -2.8 | -2.0 | -1.2 | +1.6 | -4.6 |
| ADR 2004 | \$130.29 | \$91.88 | \$93.25 | \$90.52 | \$95.05 | \$92.68 | \$88.67 | \$88.08 | \$79.25 |
| ADR 2005 | 139.33 | 97.81 | 98.17 | 97.49 | 101.47 | 98.74 | 95.22 | 96.25 | 92.25 |
| ADR 2006 | 152.56 | 105.64 | 108.20 | 104.87 | 112.42 | 107.78 | 100.14 | 104.84 | 100.94 |
| Δ % ('05-'06) | +9.5% | +8.0% | +10.2% | +7.6% | +10.8% | +9.2% | +5.2% | +8.9% | +9.4% |

| Size Category | November Occupancy | | | November Room Rate | | |
|---------------|--------------------|-------|---------|--------------------|---------|-------|
| | 2005 | 2006 | Point Δ | 2005 | 2006 | % Δ |
| < 20 units | 75.0% | 70.6% | -4.4 | \$86.20 | \$98.55 | +14.3 |
| 21-50 units | 73.6 | 71.0 | -2.6 | 90.60 | 100.04 | +10.4 |
| 51-100 units | 76.3 | 71.2 | -5.1 | 126.30 | 121.89 | -3.5 |
| 101 + units | 74.3 | 68.9 | -5.4 | 115.75 | 119.26 | +3.0 |

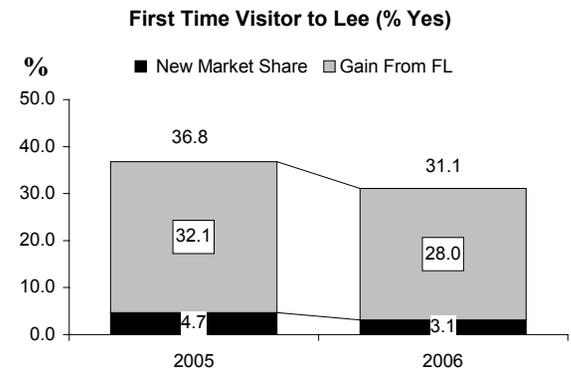


November 2006 Visitor Profile -- The Beaches of Fort Myers - Sanibel

| | <u>November 2005</u> | <u>November 2006</u> |
|---|----------------------|----------------------|
| Transportation Mode (H/M/C/C + In-Home) (Multiple Response) | | |
| Plane | 74.9% | 71.4% |
| Rental Car | 68.7 | 66.5 |
| Personal Car | 25.5 | 27.8 |
| Airport Deplaned (Base: Flew) | | |
| Southwest Florida International | 75.5% | 73.3% |
| Miami International | 8.2 | 9.7 |
| Orlando International | 9.0 | 7.4 |
| Tampa International | 5.4 | 6.3 |
| Car Rental Location (Base: Rented a Car) | | |
| Fort Myers | 73.7% | 72.6% |
| Miami | 8.9 | 11.0 |
| Orlando | 9.4 | 7.9 |
| Tampa | 5.2 | 6.1 |

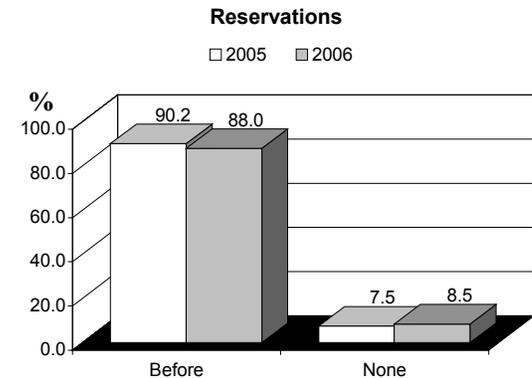
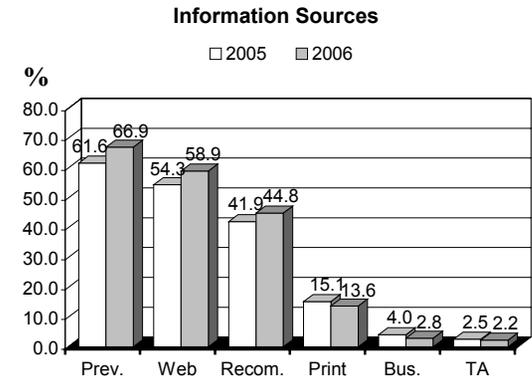


| | <u>November 2005</u> | <u>November 2006</u> |
|--|----------------------|----------------------|
| Purpose of Trip | | |
| A. Visitor Profile Data (Multiple Response) | | |
| Vacation | 97.1% | 97.7% |
| Visit Friends and Relatives | 14.8 | 16.7 |
| B. Occupancy Survey Data | | |
| Business Travelers/ Conferences/Business Meetings | 27.1% | 27.0% |
| First Visit to (% Yes) | | |
| Lee County | 36.8% | 31.1% |
| Florida | 4.7 | 3.1 |
| First Time Visitors (By Region) | | |
| Florida | 22.2% | 34.3% |
| Southeast | 34.8 | 30.0 |
| Northeast | 37.8 | 35.2 |
| Midwest | 27.0 | 20.5 |
| Europe | 51.7 | 54.5 |

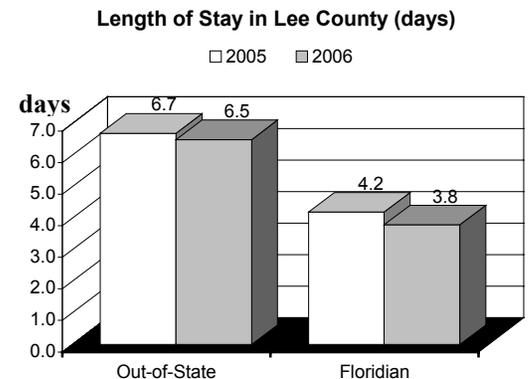


November 2006 Visitor Profile -- The Beaches of Fort Myers - Sanibel

| | <u>November 2005</u> | <u>November 2006</u> |
|---|----------------------|----------------------|
| Average Repeat Visits to Lee (Base: Repeat Visitors) | 3.3 | 3.3 |
| Info. Most Helpful to Visit (Multiple Response) | | |
| Previous Visit | 61.6% | 66.9% |
| Internet | 54.3 | 58.9 |
| Recommendations | 41.9 | 44.8 |
| Print Media | 15.1 | 13.6 |
| Business Contacts | 4.0 | 2.8 |
| Travel Agent | 2.5 | 2.2 |
| Assisted by Travel Agent (% Yes) | 9.0% | 8.9% |
| Travel Agent Assisted with (Base: Assisted by Travel Agent) | | |
| Airline Reservations | 63.5% | 56.5% |
| Hotel/Motel Reservations | 45.8 | 50.0 |
| Fly/Drive Packages | 28.1 | 27.3 |
| Reservations | | |
| Before Leaving Home | 90.2% | 88.0% |
| None | 7.5 | 8.5 |
| After Arrival | 1.8 | 1.2 |
| Percent with no reservations or reservations made less than 7 days in advance of arrival | 13.2% | 38.5% |



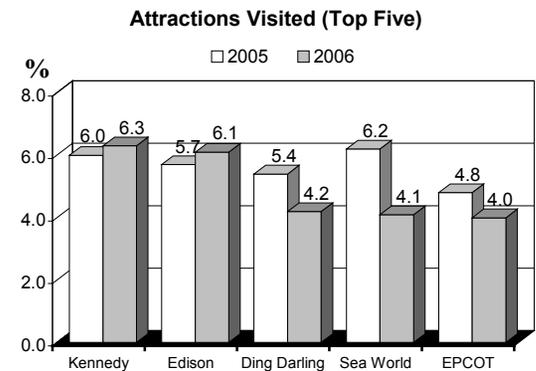
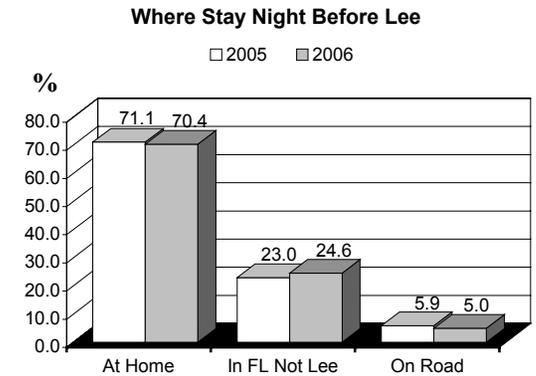
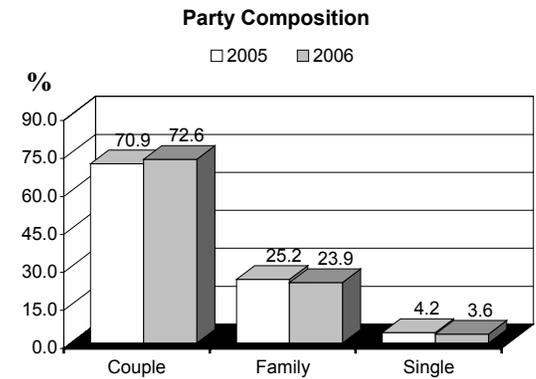
| | <u>Nov. '05</u> <u>Out-of-</u> <u>State</u> | <u>Nov. '06</u> <u>Out-of-</u> <u>State</u> | <u>Nov. '05</u> <u>Floridian</u> | <u>Nov. '06</u> <u>Floridian</u> |
|--|---|---|-------------------------------------|-------------------------------------|
| Length of Stay (Days) | | | | |
| Away from Home | 10.3 | 10.1 | 4.3 | 3.9 |
| In Florida | 9.7 | 9.4 | N/A | N/A |
| In Lee County | 6.7 | 6.5 | 4.2 | 3.8 |
| % Staying 4 Days or Less in Lee | 27.5% | 29.7% | 59.2% | 74.7% |



| | | | | |
|---------------------------------|-----|-----|-----|-----|
| Party Size (# of People) | 2.6 | 2.5 | 2.7 | 2.8 |
|---------------------------------|-----|-----|-----|-----|

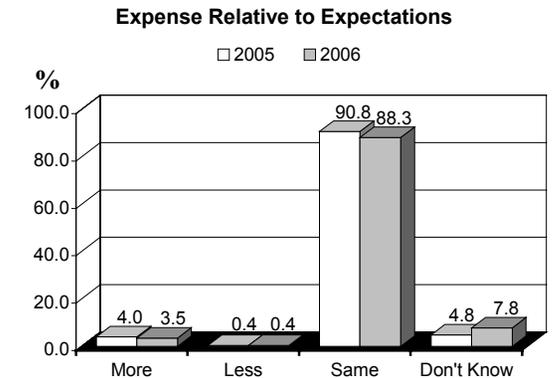
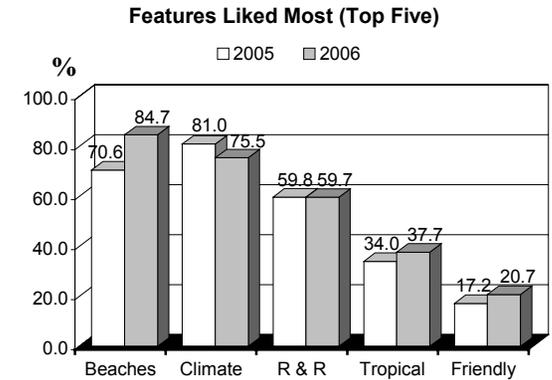
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| | <u>November 2005</u> | <u>November 2006</u> |
|--|----------------------|----------------------|
| Party Composition | | |
| Couple (<i>Traveling without Children</i>) | 70.9% | 72.6% |
| Family | 25.2 | 23.9 |
| Single | 4.2 | 3.6 |
| Where Stay Night Before Lee | | |
| At Home | 71.1% | 70.4% |
| In Florida, Not in Lee | 23.0 | 24.6 |
| On the Road, Not in Florida | 5.9 | 5.0 |
| Where Stayed in Florida (Base: Respondents In Florida Night Prior to Lee) | | |
| Orlando/Disney | 21.5% | 25.2% |
| Tampa Bay | 10.0 | 14.7 |
| Miami | 13.6 | 9.7 |
| Fort Lauderdale/Palm Beach | 7.6 | 9.5 |
| Sarasota | 8.7 | 8.5 |
| Naples/Marco | 4.9 | 6.9 |
| Florida Keys | 5.1 | 6.5 |
| Attractions Visited (Multiple Response) | | |
| Kennedy Space Center | 6.0% | 6.3% |
| Edison Home/Ford Home | 5.7 | 6.1 |
| Ding Darling | 5.4 | 4.2 |
| Sea World | 6.2 | 4.1 |
| EPCOT | 4.8 | 4.0 |
| Universal Studios | 5.6 | 3.8 |
| Disney | 3.7 | 2.4 |
| Satisfaction with Lee County | | |
| Very Satisfied | 82.3% | 83.2% |
| Satisfied | <u>17.1</u> | <u>16.6</u> |
| Satisfaction Level (Very Satisfied + Satisfied) | 99.4% | 99.8% |

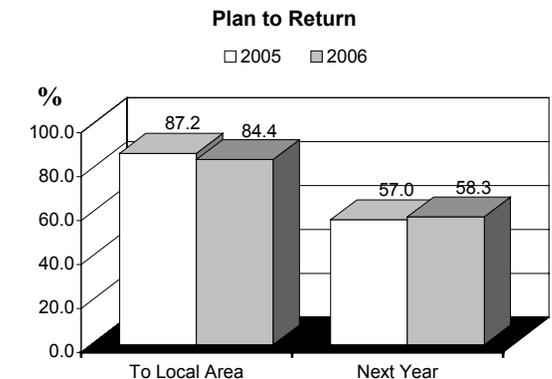


November 2006 Visitor Profile -- The Beaches of Fort Myers - Sanibel

| | <u>November 2005</u> | <u>November 2006</u> |
|---------------------------------------|----------------------|----------------------|
| Features Liked Most about Lee | | |
| Beaches | 70.6% | 84.7% |
| Climate | 81.0 | 75.5 |
| Rest/Relaxation/Quiet | 59.8 | 59.7 |
| Tropical Atmosphere | 34.0 | 37.7 |
| Friendly Residents | 17.2 | 20.7 |
| Not Commercial | 14.6 | 19.4 |
| Accommodations/Lodging | 16.1 | 16.7 |
| Restaurants | 8.3 | 13.8 |
| Clean Environment | 15.2 | 13.5 |
| Safety | 4.5 | 3.3 |
| Features Liked Least about Lee | | |
| No Specific Complaints | 71.9% | 73.0% |
| Water Quality/Red Tide | 9.6 | 9.3 |
| Insects | 6.7 | 5.5 |
| Congestion/Over Population | 6.4 | 4.4 |
| Weather | 0.6 | 1.7 |

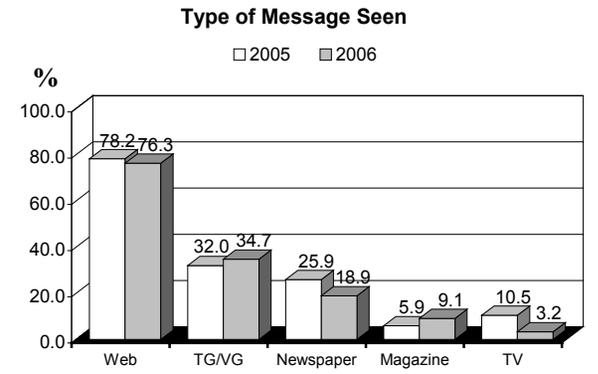
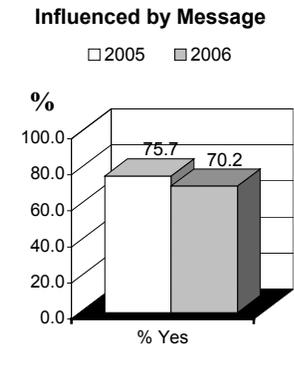
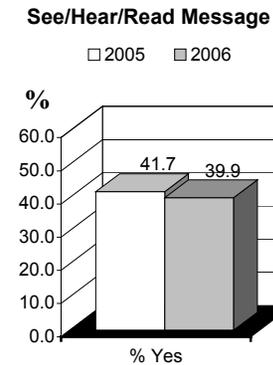
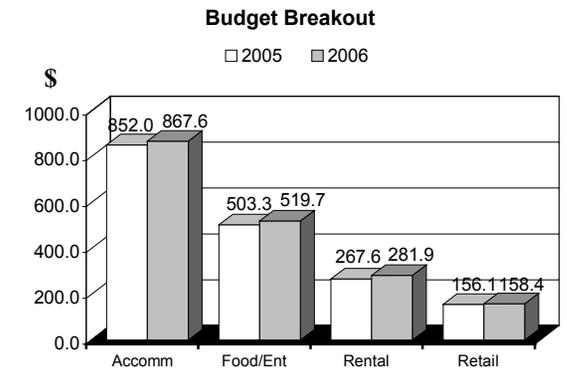


| | <u>November 2005</u> | <u>November 2006</u> |
|---|----------------------|----------------------|
| Expense Relative to Expectations | | |
| More Expensive | 4.0% | 3.5% |
| Less Expensive | 0.4 | 0.4 |
| As Expected | 90.8 | 88.3 |
| Don't Know | 4.8 | 7.8 |
| Recommend Lee to Friends/Relatives | | |
| Yes | 90.3% | 86.0% |
| Plan to Return (% Yes) | | |
| To Local Area | 87.2% | 84.4% |
| Next Year (Base: Return to Local Area) | 57.0 | 58.3 |
| Median Age Head of Household (Years) | 51.9 | 51.2 |
| Average Annual Household Income | \$88,950 | \$90,260 |



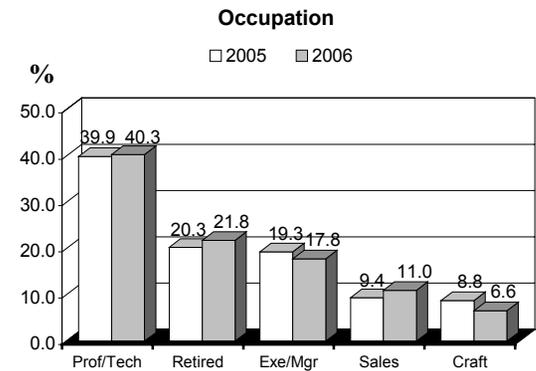
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| | <u>November 2005</u> | <u>November 2006</u> |
|--|----------------------|----------------------|
| Average Number of (Per Year) | | |
| Getaway Trips | 2.7 | 2.8 |
| Vacations | 1.9 | 2.0 |
| Out-of-State Visitor Party Budget (Lee Stay) | | |
| Total | \$1,504.80 | \$1,552.83 |
| Per Person/Trip | 578.77 | 621.13 |
| Per Person/Day | 86.38 | 95.56 |
| Out-of-State Visitor Party Budget Breakout (Lee Stay by Category) | | |
| Accommodations | \$852.00 | \$867.61 |
| Food/Entertainment | 503.30 | 519.73 |
| Rental Car | 267.62 | 281.90 |
| Retail Purchases | 156.10 | 158.37 |
| See/Read/Hear Lee Message (% Yes) | | |
| | 41.7% | 39.9% |
| Type of Message Seen (Multiple Response) | | |
| Internet | 78.2% | 76.3% |
| Travel Guides/Visitor Guides/Brochures | 32.0 | 34.7 |
| Newspapers | 25.9 | 18.9 |
| Magazines | 5.9 | 9.1 |
| Television | 10.5 | 3.2 |
| Influenced by Lee Message (Base: Respondents Reporting See/Read/Hear Message) | | |
| | 75.7% | 70.2% |

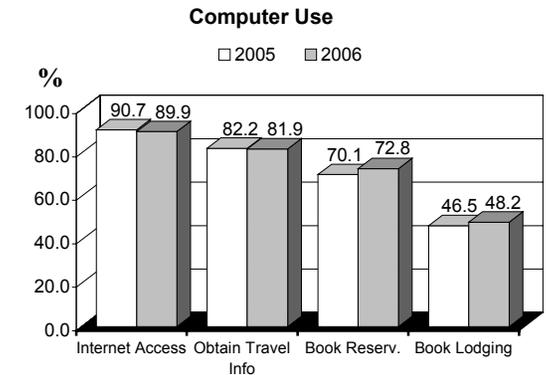


November 2006 Visitor Profile -- The Beaches of Fort Myers - Sanibel

| Occupation | November 2005 | November 2006 |
|------------------------|---------------|---------------|
| Professional/Technical | 39.9% | 40.3% |
| Retired | 20.3 | 21.8 |
| Executive/Managerial | 19.3 | 17.8 |
| Salesman/Buyer | 9.4 | 11.0 |
| Craft/Factory | 8.8 | 6.6 |



| | November 2005 | November 2006 |
|---|---------------|---------------|
| Have Internet Access | 90.7% | 89.9% |
| Use Internet to: <i>(Base: Respondents who have Internet Access)</i> | | |
| Obtain Travel Information | 82.2% | 81.9% |
| Book Reservations On-line | 70.1 | 72.8 |
| Book Lodging Reservations: <i>(Base: Respondents who Book Travel Reservations On-line)</i> | 46.5% | 48.2% |

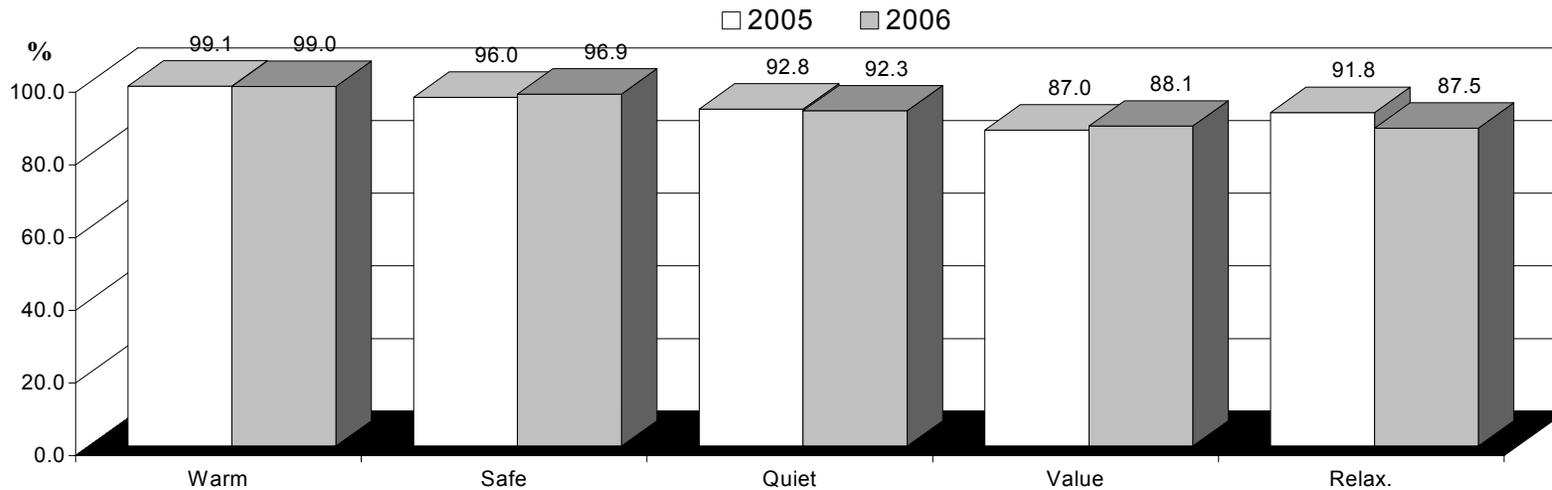


November 2006 Visitor Profile – The Beaches of Fort Myers - Sanibel

Influential Factors in Choosing Lee

| Influential Factors | Dec. '05 | Jan. '06 | Feb. '06 | Mar. '06 | Apr. '06 | May '06 | Jun. '06 | July '06 | Aug. '06 | Sept. '06 | Oct. '06 | Nov. '06 | Nov. '05 |
|--------------------------------|----------|----------|----------|----------|----------|---------|----------|----------|----------|-----------|----------|--------------|----------|
| Warm Weather | 99.7% | 98.6% | 99.6% | 99.7% | 99.7% | 96.0% | 81.5% | 75.8% | 70.6% | 83.4% | 92.9% | 99.0% | 99.1% |
| Safe Destination | 93.3 | 91.1 | 93.3 | 97.9 | 94.3 | 95.3 | 93.6 | 97.9 | 95.8 | 90.8 | 95.1 | 96.9 | 96.0 |
| Quiet Atmosphere | 90.7 | 87.3 | 85.3 | 86.1 | 90.1 | 93.0 | 87.3 | 84.7 | 88.9 | 86.2 | 83.4 | 92.3 | 92.8 |
| Good Value for the Money | 86.8 | 88.8 | 83.4 | 85.2 | 86.4 | 89.5 | 87.1 | 89.3 | 89.0 | 87.2 | 85.6 | 88.1 | 87.0 |
| Complete Relaxation | 91.6 | 82.1 | 86.8 | 88.6 | 90.0 | 88.5 | 87.8 | 88.7 | 94.0 | 89.2 | 93.3 | 87.5 | 91.8 |
| Uncommercialized Beaches | 87.0 | 88.6 | 88.3 | 89.5 | 92.8 | 90.4 | 92.9 | 96.3 | 96.7 | 95.1 | 94.6 | 87.2 | 90.3 |
| Sunning on the Beach | 83.0 | 81.7 | 84.7 | 89.9 | 89.5 | 84.7 | 79.6 | 86.0 | 82.8 | 81.3 | 84.0 | 84.0 | 79.7 |
| Reasonably Priced Lodging | 72.5 | 73.5 | 74.0 | 73.1 | 73.7 | 83.9 | 84.5 | 83.2 | 84.4 | 78.0 | 76.4 | 79.7 | 76.3 |
| Family Atmosphere | 76.3 | 72.8 | 70.3 | 76.6 | 76.1 | 74.2 | 78.6 | 79.2 | 81.6 | 72.3 | 68.8 | 73.2 | 72.6 |
| Clean, Unspoiled Environment | 68.4 | 66.9 | 72.8 | 71.6 | 75.2 | 84.8 | 76.4 | 88.5 | 81.4 | 77.4 | 74.5 | 72.8 | 66.3 |
| Tropical Plants/Animals | 61.4 | 69.1 | 73.9 | 70.2 | 71.0 | 79.1 | 79.8 | 75.7 | 75.2 | 66.1 | 65.6 | 72.1 | 61.8 |
| White Sand Beaches w/ Shelling | 73.5 | 80.4 | 74.4 | 75.1 | 79.1 | 78.9 | 79.0 | 83.2 | 77.8 | 76.7 | 76.8 | 71.9 | 74.1 |
| Upscale Accommodations | 73.7 | 72.6 | 72.7 | 73.5 | 75.1 | 79.2 | 69.0 | 74.3 | 78.2 | 75.8 | 73.7 | 71.9 | 72.0 |
| Affordable Dining | 70.6 | 70.0 | 67.8 | 68.8 | 75.8 | 78.6 | 73.5 | 69.6 | 75.1 | 70.7 | 64.9 | 66.2 | 69.7 |

Influential Factors in Choosing Lee (Top Five) -- November



TOP U.S. FEEDER MARKETS

| <u>November 2005</u> | | | <u>November 2006</u> | | | <u>'05 Rank</u> |
|----------------------|-----------------------|-------|----------------------|-----------------------|-------|-----------------|
| 1. | New York | 11.9% | 1. | New York | 12.5% | 1 |
| 2. | Chicago | 8.4 | 2. | Chicago | 7.1 | 2 |
| 3. | Boston | 6.5 | 3. | Boston | 4.7 | 3 |
| 4. | Miami/Fort Lauderdale | 4.8 | 4. | Miami/Fort Lauderdale | 4.5 | 4 |
| 5. | Indianapolis | 4.1 | 5. | Philadelphia | 4.4 | 6 |
| 6. | Philadelphia | 3.9 | 6. | Minneapolis/St. Paul | 4.2 | 7 |
| 7. | Minneapolis/St. Paul | 3.8 | 7. | Cleveland | 3.9 | 10 |
| 8. | Cincinnati | 3.5 | 8. | Indianapolis | 3.5 | 5 |
| 9. | Detroit | 3.4 | 9. | Tampa/St. Petersburg | 3.3 | -- |
| 10. | Cleveland | 3.2 | 10. | Detroit | 3.2 | 9 |

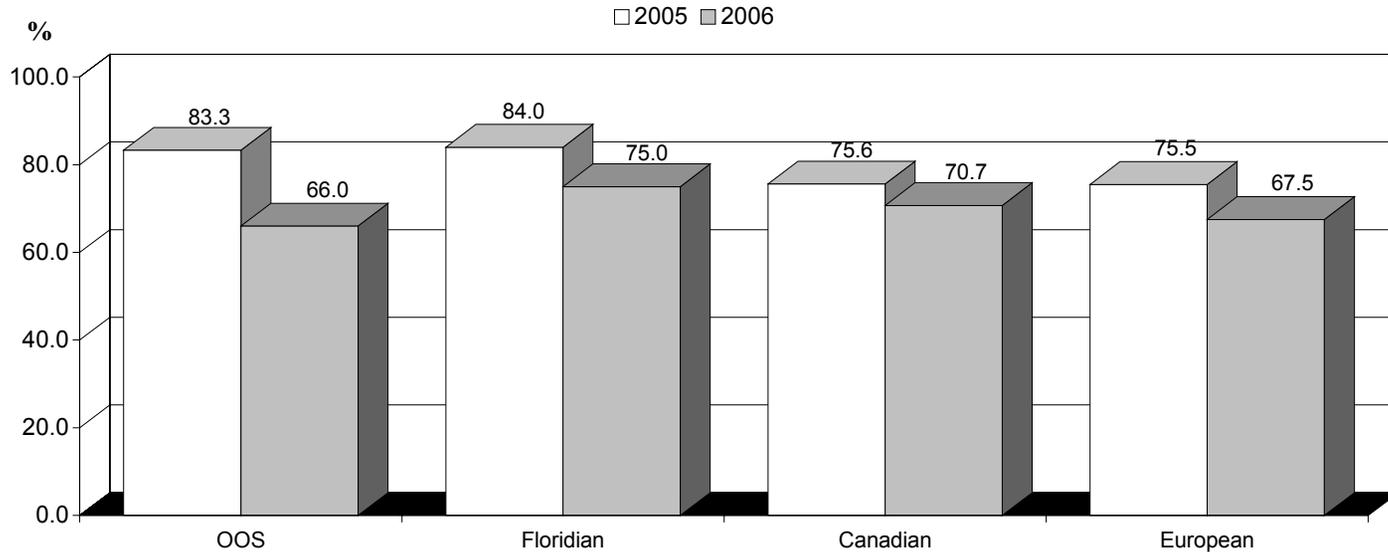
Please Note: In November 2006, the Miami/Ft. Lauderdale segment accounted for 32% of the Florida market. The distribution is as follows: Broward County: 46%; Dade County: 54%. Sample size does not permit statistical inference.

Lee County Occupancy Barometer: 2006

1. Compared to last year, **OVER THE NEXT THREE MONTHS**, Hotel/Motel/Condominium managers report **RESERVATIONS UP OR THE SAME** for:

| | Dec. '05 | Jan. '06 | Feb. '06 | Mar. '06 | Apr. '06 | May '06 | Jun. '06 | July '06 | Aug. '06 | Sept. '06 | Oct. '06 | Nov. '06 | Nov. '05 |
|---------------------|----------|----------|----------|----------|----------|---------|----------|----------|----------|-----------|----------|--------------|----------|
| U.S. OOS Travelers | 76.2% | 70.8% | 73.7% | 77.4% | 73.1% | 71.7% | 60.9% | 63.6% | 59.2% | 62.3% | 72.7% | 66.0% | 83.3% |
| Floridian Travelers | 78.5 | 73.8 | 78.9 | 80.0 | 77.4 | 75.5 | 73.1 | 70.5 | 66.0 | 66.0 | 78.0 | 75.0 | 84.0 |
| Canadian Travelers | 71.4 | 75.0 | 76.2 | 76.0 | 71.4 | 71.1 | 59.4 | 54.5 | 54.8 | 61.4 | 82.0 | 70.7 | 75.6 |
| European Travelers | 78.3 | 73.7 | 80.0 | 74.5 | 73.0 | 70.2 | 58.3 | 52.6 | 55.1 | 57.8 | 73.9 | 67.5 | 75.5 |

Reservations: November 2006 -- Over the Next Three Months

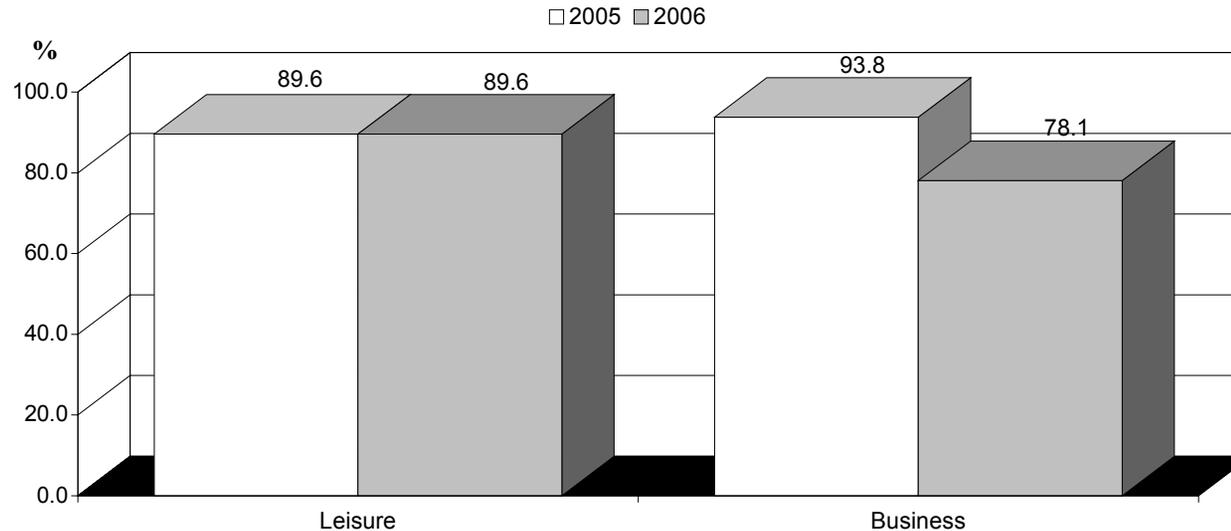


November 2006 Visitor Profile – The Beaches of Fort Myers - Sanibel

2. **OVER THE NEXT THREE MONTHS** (compared to the same period last year) industry managers **EXPECT** “growth” or “stability” for the following market segments:

| | Dec. '05 | Jan. '06 | Feb. '06 | Mar. '06 | Apr. '06 | May '06 | Jun. '06 | July '06 | Aug '06 | Sept. '06 | Oct. '06 | Nov. '06 | Nov. '05 |
|-----------------------------------|----------|----------|----------|----------|----------|---------|----------|----------|---------|-----------|----------|--------------|----------|
| Leisure Travelers | 82.0% | 80.6% | 75.8% | 81.1% | 75.0% | 78.8% | 74.1% | 68.0% | 66.7% | 73.1% | 88.9% | 89.6% | 89.6% |
| Business Travelers | 89.4 | 77.8 | 87.5 | 88.9 | 86.7 | 87.9 | 83.4 | 82.8 | 75.5 | 73.5 | 89.5 | 78.1 | 93.8 |
| Conferences/ Business Meetings | 83.8 | 79.3 | 78.6 | 80.8 | 80.0 | 78.3 | 75.8 | 75.0 | 68.6 | 65.2 | 89.3 | 81.8 | 88.9 |
| Travel and Tour | 73.5 | 80.8 | 80.0 | 89.7 | 77.5 | 81.0 | 71.0 | 71.4 | 65.1 | 52.2 | 85.2 | 61.9 | 84.6 |

Expectations: November 2006 -- Over the Next Three Months



Lee County Visitor Origins (Actual Number of Visitors) 2003 - 2006

| | Florida | | | | | | | | Southeast | | | | | | | |
|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|---------------|----------------|
| | 2003 | | 2004 | | 2005 | | 2006 | | 2003 | | 2004 | | 2005 | | 2006 | |
| | Monthly | YTD | Monthly | YTD |
| Jan | 8,964 | 8,964 | 9,269 | 9,269 | 8,238 | 8,238 | 9,122 | 9,122 | 16,174 | 16,174 | 16,067 | 16,067 | 15,070 | 15,070 | 16,261 | 16,261 |
| Feb | 10,797 | 19,761 | 10,634 | 19,903 | 8,747 | 16,985 | 10,131 | 19,253 | 13,111 | 29,285 | 13,712 | 29,779 | 13,668 | 28,738 | 14,397 | 30,658 |
| Mar | 19,591 | 39,352 | 19,750 | 39,653 | 15,881 | 32,866 | 17,849 | 37,102 | 18,421 | 47,706 | 19,447 | 49,226 | 17,352 | 46,090 | 17,254 | 47,912 |
| Apr | 32,356 | 71,708 | 32,587 | 72,240 | 29,809 | 62,675 | 28,764 | 65,866 | 18,275 | 65,981 | 18,849 | 68,075 | 17,572 | 63,662 | 16,619 | 64,531 |
| Winter | 71,708 | 71,708 | 72,240 | 72,240 | 62,675 | 62,675 | 65,866 | 65,866 | 65,981 | 65,981 | 68,075 | 68,075 | 63,662 | 63,662 | 64,531 | 64,531 |
| May | 30,632 | 102,340 | 26,977 | 99,217 | 27,490 | 90,165 | 31,720 | 97,586 | 6,515 | 72,496 | 6,463 | 74,538 | 6,802 | 70,464 | 7,296 | 71,827 |
| June | 32,197 | 134,537 | 31,018 | 130,235 | 31,759 | 121,924 | 35,383 | 132,969 | 13,861 | 86,357 | 15,509 | 90,047 | 15,028 | 85,492 | 14,088 | 85,915 |
| July | 39,357 | 173,894 | 38,764 | 168,999 | 40,066 | 161,990 | 40,846 | 173,815 | 16,748 | 103,105 | 16,181 | 106,228 | 14,685 | 100,177 | 14,869 | 100,784 |
| Aug | 28,685 | 202,579 | 18,182 | 187,181 | 21,022 | 183,012 | 22,818 | 196,633 | 7,739 | 110,844 | 5,911 | 112,139 | 7,185 | 107,362 | 6,655 | 107,439 |
| Spr/Sum | 130,871 | 202,579 | 114,941 | 187,181 | 120,337 | 183,012 | 130,767 | 196,633 | 44,863 | 110,844 | 44,064 | 112,139 | 43,700 | 107,362 | 42,908 | 107,439 |
| Sep | 20,641 | 223,220 | 20,535 | 207,716 | 21,180 | 204,192 | 22,317 | 218,950 | 6,227 | 117,071 | 7,227 | 119,366 | 6,523 | 113,885 | 5,957 | 113,396 |
| Oct | 11,593 | 234,813 | 10,542 | 218,258 | 10,594 | 214,786 | 13,444 | 232,394 | 5,072 | 122,143 | 5,155 | 124,521 | 4,540 | 118,425 | 4,507 | 117,903 |
| Nov | 12,594 | 247,407 | 11,568 | 229,826 | 12,354 | 227,140 | 12,495 | 244,889 | 6,869 | 129,012 | 5,987 | 130,508 | 6,660 | 125,085 | 6,720 | 124,623 |
| Dec | 4,434 | 251,841 | 4,872 | 234,698 | 5,557 | 232,697 | | | 10,211 | 139,223 | 8,559 | 139,067 | 9,724 | 134,809 | | |
| Fall | 49,262 | 251,841 | 47,517 | 234,698 | 49,685 | 232,697 | | | 28,379 | 139,223 | 26,928 | 139,067 | 27,447 | 134,809 | | |
| TOTAL | 251,841 | | 234,698 | | 232,697 | | | | 139,223 | | 139,067 | | 134,809 | | | |

Lee County Visitor Origins (Actual Number of Visitors) 2003 - 2006

| | Northeast | | | | | | | | Midwest | | | | | | | |
|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|
| | 2003 | | 2004 | | 2005 | | 2006 | | 2003 | | 2004 | | 2005 | | 2006 | |
| | Monthly | YTD |
| Jan | 54,563 | 54,563 | 59,529 | 59,529 | 58,472 | 58,472 | 59,688 | 59,688 | 84,572 | 84,572 | 90,426 | 90,426 | 83,990 | 83,990 | 82,691 | 82,691 |
| Feb | 89,719 | 144,282 | 100,184 | 159,713 | 94,582 | 153,054 | 92,514 | 152,202 | 119,797 | 204,369 | 131,247 | 221,673 | 129,572 | 213,562 | 125,040 | 207,731 |
| Mar | 93,276 | 237,558 | 99,056 | 258,769 | 97,052 | 250,106 | 96,982 | 249,184 | 123,394 | 327,763 | 129,745 | 351,418 | 127,638 | 341,200 | 129,706 | 337,437 |
| April | 88,679 | 326,237 | 93,927 | 352,696 | 94,135 | 344,241 | 97,478 | 346,662 | 117,739 | 445,502 | 127,472 | 478,890 | 125,827 | 467,027 | 131,356 | 468,793 |
| Winter | 326,237 | 326,237 | 352,696 | 352,696 | 344,241 | 344,241 | 346,662 | 346,662 | 445,502 | 445,502 | 478,890 | 478,890 | 467,027 | 467,027 | 468,793 | 468,793 |
| May | 41,582 | 367,819 | 43,557 | 396,253 | 44,636 | 388,877 | 47,739 | 394,401 | 43,662 | 489,164 | 45,383 | 524,273 | 44,352 | 511,379 | 51,386 | 520,179 |
| June | 33,497 | 401,316 | 36,853 | 433,106 | 37,027 | 425,904 | 38,495 | 432,896 | 45,192 | 534,356 | 48,523 | 572,796 | 50,350 | 561,729 | 52,419 | 572,598 |
| July | 39,189 | 440,505 | 43,031 | 476,137 | 43,692 | 469,596 | 42,817 | 475,713 | 49,070 | 583,426 | 54,411 | 627,207 | 56,201 | 617,930 | 52,491 | 625,089 |
| Aug | 20,430 | 460,935 | 8,737 | 484,874 | 14,369 | 483,965 | 14,520 | 490,233 | 29,407 | 612,833 | 16,318 | 643,525 | 23,772 | 641,702 | 22,213 | 647,302 |
| Spr/Sum | 134,698 | 460,935 | 132,178 | 484,874 | 139,724 | 483,965 | 143,571 | 490,233 | 167,331 | 612,833 | 164,635 | 643,525 | 174,675 | 641,702 | 178,509 | 647,302 |
| Sept | 21,068 | 482,003 | 12,951 | 497,825 | 15,732 | 499,697 | 14,931 | 505,164 | 23,456 | 636,289 | 16,385 | 659,910 | 18,187 | 659,889 | 20,411 | 667,713 |
| Oct | 18,920 | 500,923 | 17,544 | 515,369 | 16,950 | 516,647 | 17,718 | 522,882 | 25,280 | 661,569 | 24,776 | 684,686 | 24,517 | 684,406 | 22,691 | 690,404 |
| Nov | 29,663 | 530,586 | 29,936 | 545,305 | 32,442 | 549,089 | 32,445 | 555,327 | 35,179 | 696,748 | 34,807 | 719,493 | 36,417 | 720,823 | 33,600 | 724,004 |
| Dec | 38,024 | 568,610 | 37,000 | 582,305 | 41,119 | 590,208 | | | 61,537 | 758,285 | 57,936 | 777,429 | 59,595 | 780,418 | | |
| Fall | 107,675 | 568,610 | 97,431 | 582,305 | 106,243 | 590,208 | | | 145,452 | 758,285 | 133,904 | 777,429 | 138,716 | 780,418 | | |
| TOTAL | 568,610 | | 582,305 | | 590,208 | | | | 758,285 | | 777,429 | | 780,418 | | | |

Lee County Visitor Origins (Actual Number of Visitors) 2003 - 2006

| | Canada | | | | | | | | Europe | | | | | | | |
|----------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|----------------|----------------|----------------|----------------|----------------|----------------|---------------|----------------|
| | 2003 | | 2004 | | 2005 | | 2006 | | 2003 | | 2004 | | 2005 | | 2006 | |
| | Monthly | YTD | Monthly | YTD | Monthly | YTD | Monthly | YTD | Monthly | YTD | Monthly | YTD | Monthly | YTD | Monthly | YTD |
| Jan | 7,015 | 7,015 | 7,003 | 7,003 | 7,635 | 7,635 | 6,742 | 6,742 | 15,784 | 15,784 | 17,508 | 17,508 | 20,495 | 20,495 | 18,442 | 18,442 |
| Feb | 7,198 | 14,213 | 7,556 | 14,559 | 8,201 | 15,836 | 7,732 | 14,474 | 10,540 | 26,324 | 11,194 | 28,702 | 12,848 | 33,343 | 11,997 | 30,439 |
| Mar | 10,234 | 24,447 | 9,116 | 23,675 | 9,411 | 25,247 | 10,412 | 24,886 | 18,129 | 44,453 | 19,143 | 47,845 | 20,881 | 54,224 | 18,742 | 49,181 |
| April | 7,789 | 32,236 | 8,945 | 32,620 | 9,413 | 34,660 | 9,908 | 34,794 | 23,069 | 67,522 | 25,558 | 73,403 | 27,299 | 81,523 | 25,248 | 74,429 |
| Winter | 32,236 | 32,236 | 32,620 | 32,620 | 34,660 | 34,660 | 34,794 | 34,794 | 67,522 | 67,522 | 73,403 | 73,403 | 81,523 | 81,523 | 74,429 | 74,429 |
| May | 1,386 | 33,622 | 1,686 | 34,306 | 1,842 | 36,502 | 1,745 | 36,539 | 11,089 | 78,611 | 12,364 | 85,767 | 12,895 | 94,418 | 14,115 | 88,544 |
| June | 1,011 | 34,633 | 1,228 | 35,534 | 930 | 37,432 | 1,147 | 37,686 | 13,716 | 92,327 | 15,355 | 101,122 | 15,647 | 110,065 | 17,200 | 105,744 |
| July | 1,005 | 35,638 | 1,245 | 36,779 | 1,450 | 38,882 | 1,612 | 39,298 | 15,910 | 108,237 | 17,782 | 118,904 | 19,217 | 129,282 | 21,140 | 126,884 |
| Aug | 619 | 36,257 | 321 | 37,100 | 798 | 39,680 | 605 | 39,903 | 13,207 | 121,444 | 12,657 | 131,561 | 18,716 | 147,998 | 16,767 | 143,651 |
| Spr/Sum | 4,021 | 36,257 | 4,480 | 37,100 | 5,020 | 39,680 | 5,109 | 39,903 | 53,922 | 121,444 | 58,158 | 131,561 | 66,475 | 147,998 | 69,222 | 143,651 |
| Sept | 682 | 36,939 | 358 | 37,458 | 460 | 40,140 | 556 | 40,459 | 9,553 | 130,997 | 10,446 | 142,007 | 11,588 | 159,586 | 11,992 | 155,643 |
| Oct | 1,610 | 38,549 | 1,308 | 38,766 | 1,513 | 41,653 | 1,166 | 41,625 | 13,848 | 144,845 | 13,773 | 155,780 | 14,075 | 173,661 | 14,998 | 170,641 |
| Nov | 3,018 | 41,567 | 2,334 | 41,100 | 2,686 | 44,339 | 2,940 | 44,565 | 12,385 | 157,230 | 12,786 | 168,566 | 12,891 | 186,552 | 12,390 | 183,031 |
| Dec | 4,837 | 46,404 | 5,267 | 46,367 | 5,973 | 50,312 | | | 11,958 | 169,188 | 14,221 | 182,787 | 12,780 | 199,332 | | |
| Fall | 10,147 | 46,404 | 9,267 | 46,367 | 10,632 | 50,312 | | | 47,744 | 169,188 | 51,226 | 182,787 | 51,334 | 199,332 | | |
| TOTAL | 46,404 | | 46,367 | | 50,312 | | | | 169,188 | | 182,787 | | 199,332 | | | |

Lee County Visitor Origins (Actual Number of Visitors) 2003 - 2006

| | Markets of Opportunity | | | | | | | | TOTAL | | | | | | | |
|----------------|------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| | 2003 | | 2004 | | 2005 | | 2006 | | 2003 | | 2004 | | 2005 | | 2006 | |
| | Monthly | YTD | Monthly | YTD | Monthly | YTD | Monthly | YTD | Monthly | YTD | Monthly | YTD | Monthly | YTD | Monthly | YTD |
| Jan | 7,795 | 7,795 | 6,179 | 6,179 | 7,033 | 7,033 | 5,354 | 5,354 | 194,867 | 194,867 | 205,981 | 205,981 | 200,933 | 200,933 | 198,300 | 198,300 |
| Feb | 5,913 | 13,708 | 5,317 | 11,496 | 5,741 | 12,774 | 4,799 | 10,153 | 257,075 | 451,942 | 279,844 | 485,825 | 273,359 | 474,292 | 266,610 | 464,910 |
| Mar | 9,357 | 23,065 | 7,596 | 19,092 | 5,882 | 18,656 | 6,545 | 16,698 | 292,402 | 744,344 | 303,853 | 789,678 | 294,097 | 768,389 | 297,490 | 762,400 |
| April | 11,684 | 34,749 | 12,140 | 31,232 | 9,727 | 28,383 | 10,227 | 26,925 | 299,591 | 1,043,935 | 319,478 | 1,109,156 | 313,782 | 1,082,171 | 319,600 | 1,082,000 |
| Winter | 34,749 | 34,749 | 31,232 | 31,232 | 28,383 | 28,383 | 26,925 | 26,925 | 1,043,935 | 1,043,935 | 1,109,156 | 1,109,156 | 1,082,171 | 1,082,171 | 1,082,000 | 1,082,000 |
| May | 3,742 | 38,491 | 4,075 | 35,307 | 3,684 | 32,067 | 4,599 | 31,524 | 138,608 | 1,182,543 | 140,505 | 1,249,661 | 141,701 | 1,223,872 | 158,600 | 1,240,600 |
| June | 4,909 | 43,400 | 5,067 | 40,374 | 4,183 | 36,250 | 5,078 | 36,602 | 144,383 | 1,326,926 | 153,553 | 1,403,214 | 154,924 | 1,378,796 | 163,810 | 1,404,410 |
| July | 6,197 | 49,597 | 6,401 | 46,775 | 5,983 | 42,233 | 5,375 | 41,977 | 167,476 | 1,494,402 | 177,815 | 1,581,029 | 181,294 | 1,560,090 | 179,150 | 1,583,560 |
| Aug | 3,095 | 52,692 | 2,120 | 48,895 | 2,838 | 45,071 | 2,852 | 44,829 | 103,182 | 1,597,584 | 64,246 | 1,645,275 | 88,700 | 1,648,790 | 86,430 | 1,669,990 |
| Spr/Sum | 17,943 | 52,692 | 17,663 | 48,895 | 16,688 | 45,071 | 17,904 | 44,829 | 553,649 | 1,597,584 | 536,119 | 1,645,275 | 566,619 | 1,648,790 | 587,990 | 1,669,990 |
| Sept | 3,668 | 56,360 | 3,649 | 52,544 | 3,070 | 48,141 | 3,256 | 48,085 | 85,295 | 1,682,879 | 71,551 | 1,716,826 | 76,740 | 1,725,530 | 79,420 | 1,749,410 |
| Oct | 4,187 | 60,547 | 3,847 | 56,391 | 3,481 | 51,622 | 3,186 | 51,271 | 80,510 | 1,763,389 | 76,945 | 1,793,771 | 75,670 | 1,801,200 | 77,710 | 1,827,120 |
| Nov | 4,371 | 64,918 | 4,059 | 60,450 | 3,975 | 55,597 | 4,410 | 55,681 | 104,079 | 1,867,468 | 101,477 | 1,895,248 | 107,425 | 1,908,625 | 105,000 | 1,932,120 |
| Dec | 3,359 | 68,277 | 3,818 | 64,268 | 4,167 | 59,764 | | | 134,360 | 2,001,828 | 131,673 | 2,026,921 | 138,915 | 2,047,540 | | |
| Fall | 15,585 | 68,277 | 15,373 | 64,268 | 14,693 | 59,764 | | | 404,244 | 2,001,828 | 381,646 | 2,026,921 | 398,750 | 2,047,540 | | |
| TOTAL | 68,277 | | 64,268 | | 59,764 | | | | 2,001,828 | | 2,026,921 | | 2,047,540 | | | |