



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

**October 2009 Visitor Profile and Occupancy Analysis
December 11, 2009**

Prepared for:

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

Prepared by:



providing direction in travel & tourism



Executive Summary October 2009

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



Executive Summary

Visitor Estimates

- Lee County hosted more than 160,000 visitors staying in paid accommodations during the month of October 2009, and just over 75,000 staying with friends or relatives while visiting the County, for a total of 239,811 visitors.
- Total visitation in October 2009 was down significantly from October 2008 (-31.6%), driven by the substantial decrease in those staying with friends and relatives (-62.5%). Visitation among those staying in paid accommodations showed a healthy increase (+13.0%), but not enough to outweigh the loss in VFR visitation.
- Two-thirds of October 2009 visitors staying in paid accommodations were U.S. residents (66%), about the same as in October 2008 (60%). Germany and the UK contributed the largest share of international visitors staying in paid accommodations (13% and 11% respectively).
- Similar to last October, U.S. visitors staying in paid accommodations during October 2009 were most likely to have come from the Midwest (42%). However, the incidence of visitors residing in the South showed an increase year-over-year (36% vs. 18% October 2008), while the proportion of visitors from the Northeast decreased (18% vs. 25% October 2008).

Visitor Expenditures

- The average per person per day expenditure was \$103.13 in October 2009 – a 10.5% decline from October 2008 (\$115.24). The October 2009 average expenditure was about the same as that in September 2009 (\$100.27).
- Total visitor expenditures for October 2009 are estimated at \$117 million, a 39.8% drop from \$194 million in October 2008 – the result of fewer visitors spending less money on average per person per day. Expenditures among those staying in paid accommodations decreased 19.5% from October 2008 to October 2009. October 2009 expenditures among those staying with friends and relatives decreased even more compared to October 2008 (61.1%).



Total October Visitation					
	%		Visitor Estimates		% Change 2008-2009
	2008	2009	2008	2009	
Paid Accommodations	41%	68%	143,552	162,250	13.0%
Friends/Relatives	59%	32%	206,829	77,561	-62.5%
<i>Total Visitation</i>			350,381	239,811	-31.6%
October Visitor Origin – Visitors Staying in Paid Accommodations					
	2008	2009	2008	2009	
United States	60%	66%	85,850	107,604	25.3%
Germany	13%	13%	18,296	20,627	12.7%
UK	12%	11%	16,888	17,118	1.4%
Canada	5%	4%	7,037	6,795	-3.4%
Scandinavia	4%	2%	5,629	3,478	-38.2%
Ireland	3%	1%	4,222	2,246	-46.8%
Switzerland	--	1%	--	2,136	--
France	1%	1%	1,407	1,014	-27.9%
Austria	1%	--	1,407	--	--
BeNeLux	1%	--	1,407	--	--
Other	1%	1%	1,407	1,232	-12.4%
U.S. Region (Paid Accommodations)					
	2008	2009	2008	2009	
Florida	10%	13%	8,444	14,436	71.0%
South (including Florida)	18%	36%	15,481	39,146	152.9%
Midwest	38%	42%	32,370	44,843	38.5%
Northeast	25%	18%	21,111	19,452	-7.9%
West	2%	1%	1,407	1,014	-27.9%
No Answer	16%	3%	14,074	3,150	-77.6%

2009 Top DMAs (Paid Accommodations)		
New York	8%	8,712
Tampa-Saint Petersburg (Sarasota)	7%	7,889
Indianapolis	7%	7,371
Columbus, OH	5%	5,425
Philadelphia	5%	5,285
Detroit	4%	4,550
Orlando-Daytona Beach-Melbourne	4%	4,382
Chicago	3%	3,368
Minneapolis-Saint Paul	3%	3,367
Louisville	3%	3,289



Trip Planning

- The accommodations booking window tended to be shorter for October 2009 visitors than for October 2008 visitors. Two-thirds of October 2009 visitors (67%) made lodging reservations within *six* months of their Lee County trip (vs. 46% October 2008), and a sizable minority (42%) booked their lodging with within *three* months of their trip (vs. 27% October 2008).
- The majority of October 2009 visitors said they had visited web sites while planning their trip (83%) and were more likely to do so than October 2008 visitors (74%). October 2009 visitors most often mentioned they went to airline web sites (34%), hotel web sites (33%), search engines (29%), and booking sites (29%). The proportion claiming to have visited hotel sites, search engines, and booking sites for trip planning was higher among October 2009 visitors than among October 2008 visitors. October 2009 visitors were also more likely to have requested information from the web site of a hotel/motel/condo (21% vs. 11% October 2008) or the VCB web site (11% vs. 5% October 2008).
- When deciding to visit Lee County, October 2009 visitors were more likely than October 2008 visitors to say *reasonably priced lodging* influenced their selection (63% vs. 52% October 2008).

Visitor Profile

- Similar to September 2009, October 2009 visitors were less likely to fly to the area than were visitors in the prior October (60% vs. 76% October 2008).
- While the average number of days spent away from home and in Florida was about the same in October 2009 as in October 2008, the average length of stay in Lee County was slightly shorter year-over-year (8.3 vs. 9.2 October 2008), although not statistically significant.
- Half of October 2009 visitors said they were staying in a hotel/motel (54%), one-third in a condo/vacation home (34%), and one in ten at the home of a friend or family member (11%). A higher proportion of visitors in October 2009 stayed in a hotel/motel than in the prior year (54% vs. 28% October 2008), while the incidence of staying with family/friends decreased year-over-year. Half felt that the quality of accommodations *far exceeded* or *exceeded their expectations* (50%) in October 2009 versus 62% last year.
- The October year-over-year decline in the estimated number of visitors staying with friends or family was supported by some differentiations observed in the profiles of those visitors. October 2009 visitors were less likely than October 2008 visitors to indicate:
 - Staying at the home of family/friend as their accommodation type (11% vs. 38%);
 - Visiting friends/relatives as their trip purpose (23% vs. 35%); and
 - Visiting friends/relatives as an activity enjoyed while in Lee County (27% vs. 38%).



- The top activities enjoyed while in Lee County during October 2009 were *beaches, relaxing, dining out, swimming, and shopping*. Visitor satisfaction remains extremely high, with 95% of October 2009 visitors reporting being *very satisfied* (69%) or *satisfied* (27%) with their visit. The vast majority indicated they were likely to return to Lee County (92%), but only half of them are likely to return next year (56% vs. 67% October 2008).
- Similar to last year, the least liked feature about the Lee County area among October 2009 visitors was *insects* (27%). Visitors' concerns about *traffic* (14%), *lack of nightlife* (5%), and *red tide* (3%) were less prevalent during October 2009 than during the prior year (27%, 14%, and 13% respectively).
- October 2009 visitors averaged 53 years of age with an average household income of approximately \$95,000. The majority of visitors were married (78%) and only a minority were traveling *with children* (17%).

The demographic composition of October 2009 visitors differed from October 2008 on several characteristics.

October 2009 visitors:

- Were slightly older (52.6 average age vs. 47.7 October 2008);
- Were more likely to be traveling as a couple (51% vs. 36% October 2008);
- Were more likely to be married (78% vs. 68% October 2008);
- Had slightly fewer people in their travel party (2.7 average party size vs. 3.1 October 2008); and
- Took more short-getaway trips per year (4.2 average trips vs. 3.4 October 2008).



Lodging Property Manager Assessments

- For the Lee County lodging industry in total, the number of *available* room nights was about the same in October 2009 as in the October prior, and *occupied* room nights increased slightly (+2.1%). Hotel/motel/resort *available* room nights were up 10.2% from a year ago but occupied room nights dropped slightly (-1.0%). Properties in the condo/vacation home and RV park/campground categories both saw a decline in *available* room nights but an increase in *occupied* room nights.

	Occupied Room Nights			Available Room Nights		
	2008	2009	% Change	2008	2009	% Change
Hotel/Motel/Resort/B&B	148,944	147,408	-1.0%	318,432	350,912	10.2%
Condo/Cottage/Vacation Home	51,528	53,918	4.6%	172,019	157,114	-8.7%
RV Park/Campground	42,823	47,112	10.0%	160,301	136,555	-14.8%
Total	243,295	248,438	2.1%	650,752	644,581	-0.9%

- As a result, average occupancy rates increased 3.1% from 37.4% in October 2008 to an average of 38.5% in October 2009. Hotels/motels/resorts suffered a decline in occupancy rates (-10.2%) – while occupied room nights remained fairly stable year-over-year, occupancy rates were hurt by the increase in available room nights. Occupancy rates for condos/cottages and RV parks/campgrounds experienced an increase (+14.6% and +29.2% respectively).
- Overall average daily rates dropped from \$103.13 to \$93.43 year-over-year (-9.4%). ADR decreases were reported for hotels/motels/resorts (-16.6%) and RV parks/campgrounds (-2.5%), while condos/vacation homes had an increase in ADR (+11.2%) over last year.
- RevPAR was down 6.6% from October 2008 due to a decrease for hotels/motels/resorts (-25.1%). Condos/vacation homes and RV parks/campgrounds fared much better with RevPAR increases 25% or higher over the same period the prior year.

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2008	2009	% Change	2008	2009	% Change	2008	2009	% Change
Property Managers Responding	142	136		140	140		142/140	136/140	
Hotel/Motel/Resort/B&B	46.8%	42.0%	-10.2%	\$116.15	\$96.87	-16.6%	\$54.33	\$40.69	-25.1%
Condo/Cottage/Vacation Home	30.0%	34.3%	14.6%	\$121.92	\$135.63	11.2%	\$36.52	\$46.55	27.5%
RV Park/Campground	26.7%	34.5%	29.2%	\$35.23	\$34.34	-2.5%	\$9.41	\$11.85	25.9%
AVERAGE	37.4%	38.5%	3.1%	\$103.13	\$93.43	-9.4%	\$38.56	\$36.01	-6.6%



- Property managers in October 2009 were more positive than they had been in October 2008 when comparing their current month's *occupancy* year-over-year. Fully half reported their October 2009 *occupancy* was the same or better than the prior year compared with 40% during October 2008. Current month *revenue* comparisons were about the same year-over-year, with more than half of property managers reporting that October revenue was worse than the prior year (57% October 2009 and 59% October 2008).
- Projections for the next three months (November – January) remain low. Only four property managers in ten reported that their total level of reservations for the next three months are the same or better than the same period the prior year – comparable to projections made in October 2008 – while more than half (57%) reported that their reservations are down.



October 2009 Lee County Snapshot

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Ireland	3%	1%	4,222	2,246
Switzerland	--	1%	--	2,136
France	1%	1%	1,407	1,014
Austria	1%	--	1,407	--
BeNeLux	1%	--	1,407	--
Other	1%	1%	1,407	1,232

Total Visitor Expenditures			
	2008	2009	% Change
Total Visitor Expenditures	\$193,838,104	\$116,717,096	-39.8%
Paid Accommodations	\$99,095,816	\$79,817,387	-19.5%

Average Per Person Per Day Expenditures		
2008	2009	% Change
\$115.24	\$103.13	-10.5%

First-Time/Repeat Visitors to Lee County		
	2008	2009
First-time	24%	24%
Repeat	74%	74%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
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Property Managers Responding	142	136		140	140		142/140	136/140	
Hotel/Motel/Resort/B&B	46.8%	42.0%	-10.2%	\$116.15	\$96.87	-16.6%	\$54.33	\$40.69	-25.1%
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RV Park/Campground	26.7%	34.5%	29.2%	\$35.23	\$34.34	-2.5%	\$9.41	\$11.85	25.9%
AVERAGE	37.4%	38.5%	3.1%	\$103.13	\$93.43	-9.4%	\$38.56	\$36.01	-6.6%



Visitor Profile Analysis October 2009

A total of 206 interviews were conducted with visitors in Lee County during the month of October 2009. A total sample of this size is considered accurate to plus or minus 6.8 percentage points at the 95% confidence level.

A total of 199 interviews were conducted with visitors in Lee County during the month of October 2008. A total sample of this size is considered accurate to plus or minus 6.9 percentage points at the 95% confidence level.

Due to the short time period and the sample size involved, monthly results will fluctuate and should be viewed with caution for decision-making purposes.



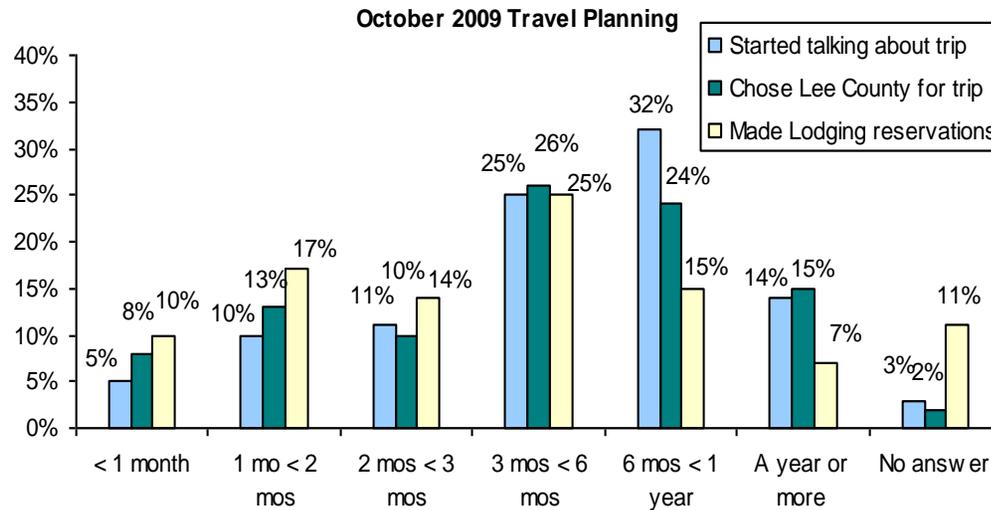
Travel Planning

	Started Talking About Trip		Chose Lee County for Trip		Made Lodging Reservations	
	2008	2009	2008	2009	2008	2009
Total Respondents	199	206	199	206	199	206
< 1 month	1%	<5%>	4%	8%	5%	10%
1 mo - < 2 mos	10%	10%	10%	13%	11%	17%
2 mos - < 3 mos	9%	11%	9%	10%	10%	14%
3 mos - < 6 mos	28%	25%	27%	26%	18%	25%
6 mos - < 1 year	36%	32%	31%	24%	<30%>	15%
A year or more	14%	14%	15%	15%	8%	7%
No answer	2%	3%	4%	2%	17%	11%

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

Reserved Accommodations		
	October	
	2008	2009
Total Respondents	199	206
Before leaving home	83%	82%
After arriving in FL	3%	7%
On the road, but not in FL	<1%	--
No answer	13%	10%

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

Computer Access		
	October	
	2008	2009
Total Respondents	199	206
<u>Yes</u>	88%	91%
<i>Home</i>	21%	30%
<i>Work</i>	1%	3%
<i>Both Home and Work</i>	66%	57%
<u>No</u>	9%	9%

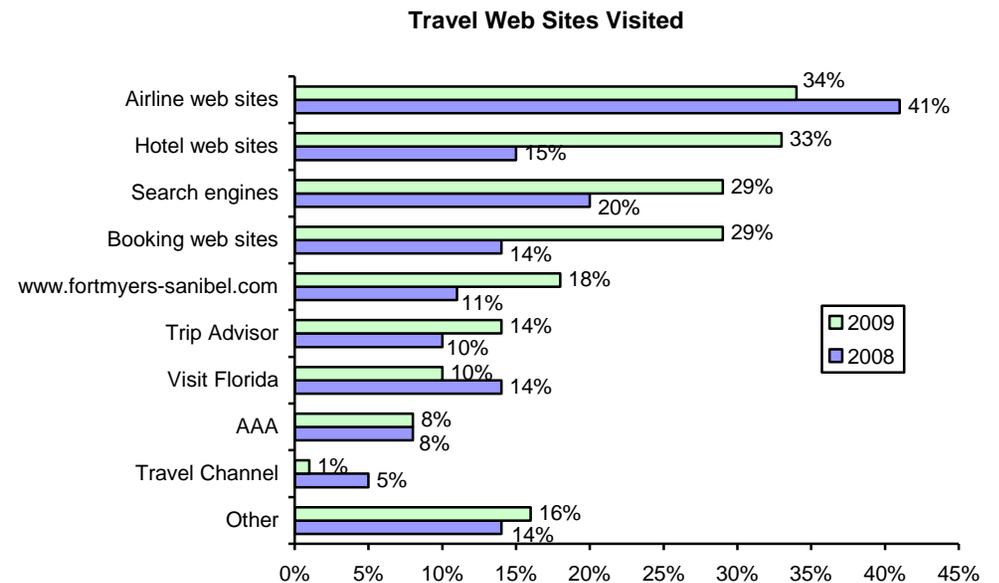
Q8: Do you have access to a computer?



Travel Planning

Travel Web Sites Visited by October Travelers		
	2008	2009
Total Respondents with computer access	176	187
Visited web sites (net)	74%	<83%>
Airline web sites	41%	34%
Hotel web sites	15%	<33%>
Search engines	20%	<29%>
Booking web sites	14%	<29%>
www.fortmyers-sanibel.com	11%	18%
Trip Advisor	10%	14%
Visit Florida	14%	10%
AAA	8%	8%
Travel Channel	<5%>	1%
Other	14%	16%
Did not visit web sites	21%	15%
No Answer	5%	2%

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



Base: Respondents with Computer Access



Travel Planning

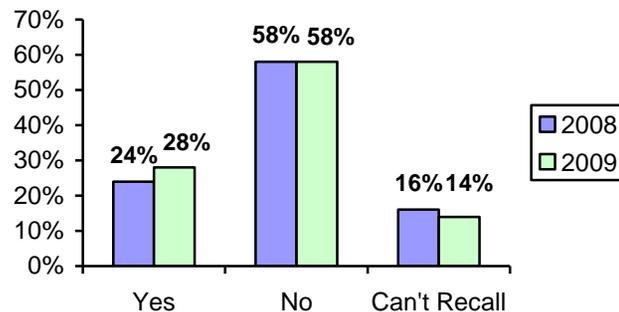
October Travelers Requesting Information		
	2008	2009
Total Respondents	199	206
Requested Information (net)	35%	44%
Hotel Web Site	11%	<21%>
VCB Web Site	5%	<11%>
Call hotel	6%	9%
Visitor Guide	5%	7%
Call local Chamber of Commerce	2%	5%
Clipping/mailling coupon	1%	1%
Call VCB	1%	1%
E-Newsletter	1%	<1%>
Magazine Reader Service Card	--	<1%>
Other	14%	11%
Did not request information	53%	48%
No Answer	12%	9%

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	199	206
Yes	11%	6%
No	86%	<93%>

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

Recall of Promotions



Recall of Lee County Promotions		
	2008	2009
Total Respondents	199	206
Yes	24%	28%
No	58%	58%
Can't Recall	16%	14%

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

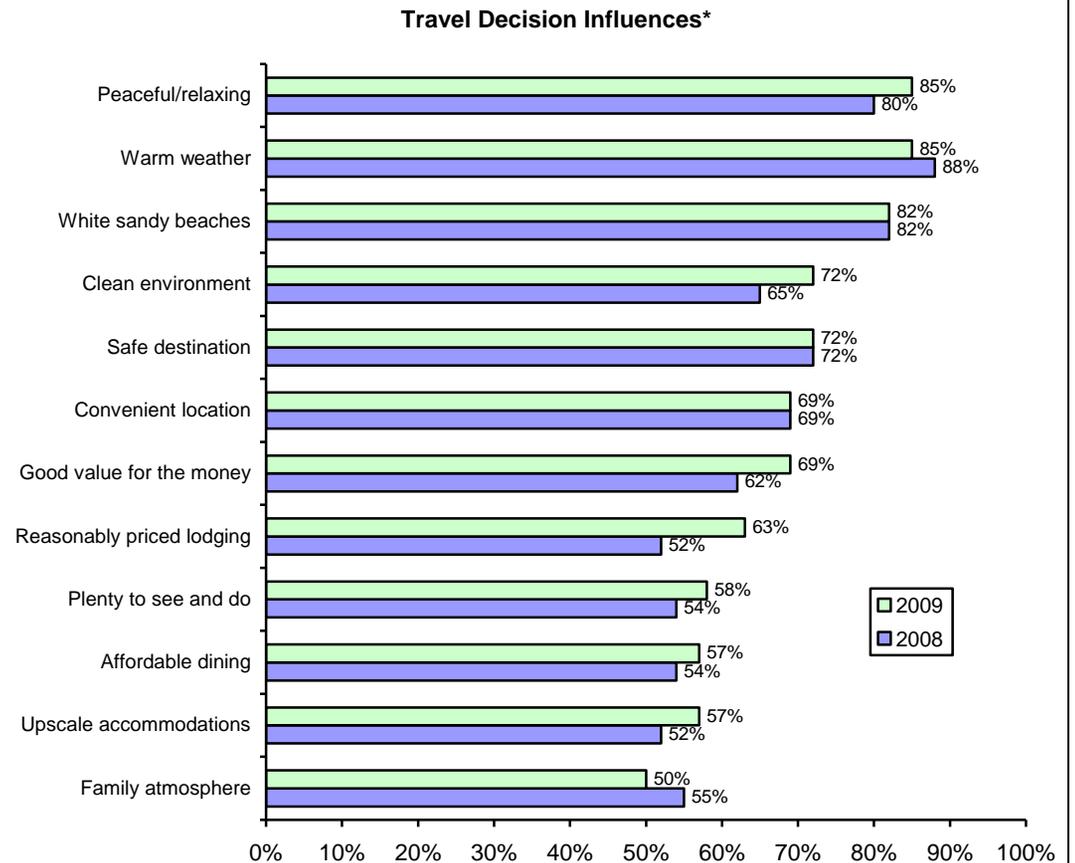


Travel Planning

October Travel Decision Influences*		
	2008	2009
Total Respondents	199	206
Peaceful/Relaxing	80%	85%
Warm weather	88%	85%
White sandy beaches	82%	82%
Clean environment	65%	72%
Safe destination	72%	72%
Convenient location	69%	69%
Good value for the money	62%	69%
Reasonably priced lodging	52%	<63%>
Plenty to see and do	54%	58%
Affordable dining	54%	57%
Upscale accommodations	52%	57%
Family atmosphere	55%	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)

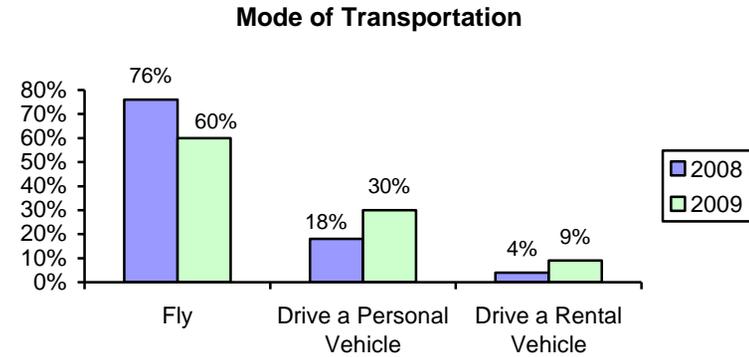




Trip Profile

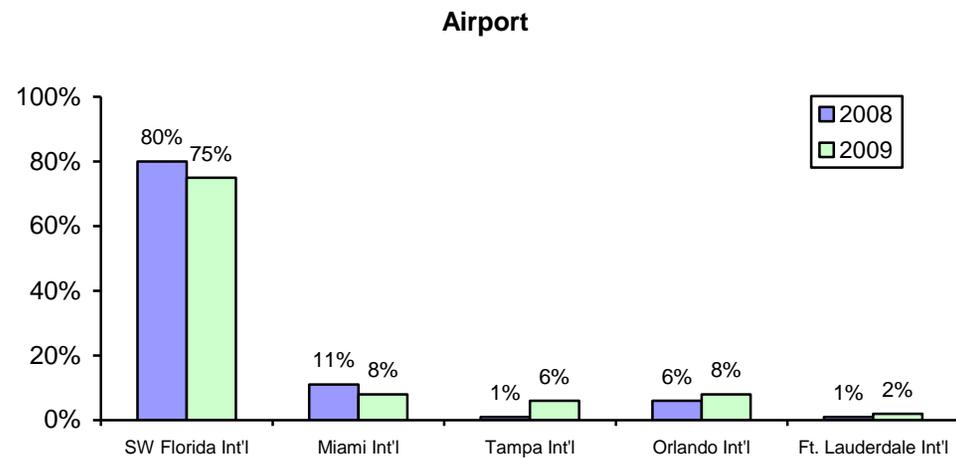
Mode of Transportation		
	2008	2009
Total Respondents	199	206
Fly	<76%>	60%
Drive a Personal Vehicle	18%	<30%>
Drive a Rental Vehicle	4%	<9%>
Drive an RV	1%	1%
Other/No answer	2%	1%

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



Airport		
	2008	2009
Total Respondents who Arrived by Air	151	124
SW Florida Int'l	80%	75%
Miami Int'l	11%	8%
Tampa Int'l	1%	<6%>
Orlando Int'l	6%	8%
Ft. Lauderdale Int'l	1%	2%
Other/No Answer	1%	1%

Q2: At which Florida airport did you land?

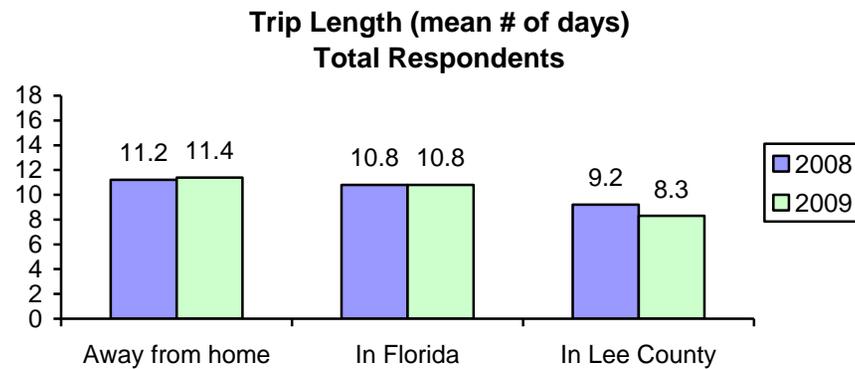




Trip Profile

October Trip Length Mean # of Days			
	Total Respondents		
	2008	2009	% Change
Total Respondents	199	206	
Away from home	11.2	11.4	1.8%
In Florida	10.8	10.8	0.0%
In Lee County	9.2	8.3	-9.8%

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





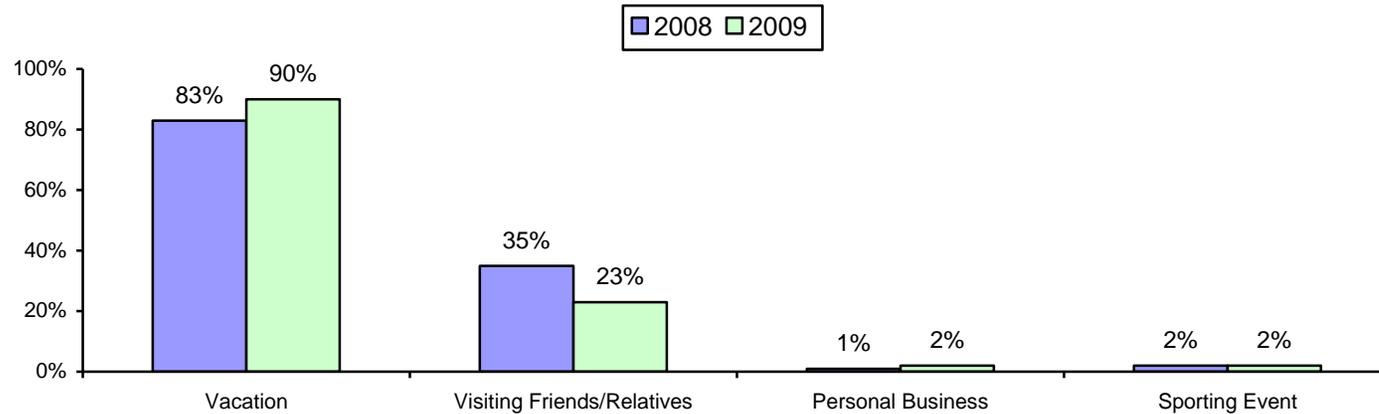
Trip Profile

Reason for October Visit		
	2008	2009
Total Respondents	199	206
Vacation	83%	<90%>
Visiting Friends/Relatives	<35%>	23%
Personal Business	1%	2%
Sporting Event	2%	2%
Conference/Meeting*	--	1%
Other Business Trip*	1%	1%
Convention/Trade Show*	1%	--
Other/No Answer	4%	2%

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

*Note: These answer categories were revised in July 2009. Therefore, year-over-year results are not directly comparable.

Reason for October Visit





Trip Profile

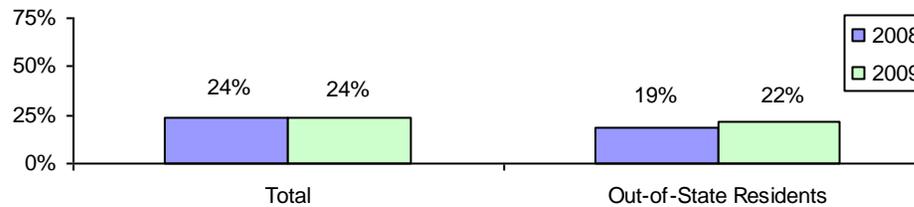
First Time Visitors to Lee County								
	Total		Florida Residents		Out-of-State Residents		International Visitors	
	2008	2009	2008	2009	2008	2009	2008	2009
Total Respondents	199	206	7**	18**	107	125	58*	58*
Yes	24%	24%	N/A	N/A	19%	22%	38%	32%
No	74%	74%	N/A	N/A	81%	74%	59%	68%
No answer	2%	2%	N/A	N/A	1%	3%	3%	--

Q20: Is this your first visit to Lee County?

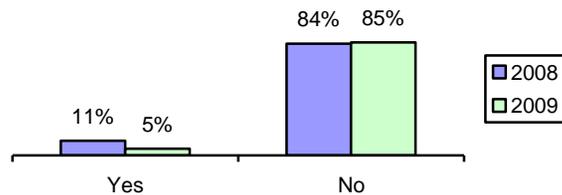
*Note: Small sample size (N<70). Please interpret results with caution.

**N/A: Insufficient number of responses for statistical analysis (N<30).

First Time Visitors to Lee County



First Time Visitors to Florida



First Time Visitors to Florida		
	2008	2009
Total Respondents	199	206
Yes	<11%>	5%
No	84%	85%
No Answer	1%	1%
FL Residents*	4%	<9%>

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.



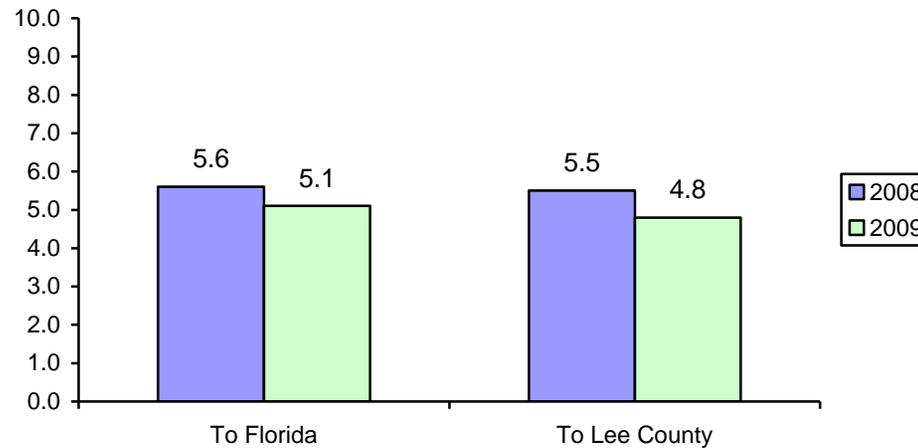
Trip Profile

Previous Visits in Five Years				
	Mean # of Visits To Florida		Mean # of Visits To Lee County	
	2008	2009	2008	2009
Base: Repeat Visitors	167 (FL res. Excl.)	175 (FL res. Excl.)	148	152
Number of visits	5.6	5.1	5.5	4.8

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?

Previous Visits in Five Years



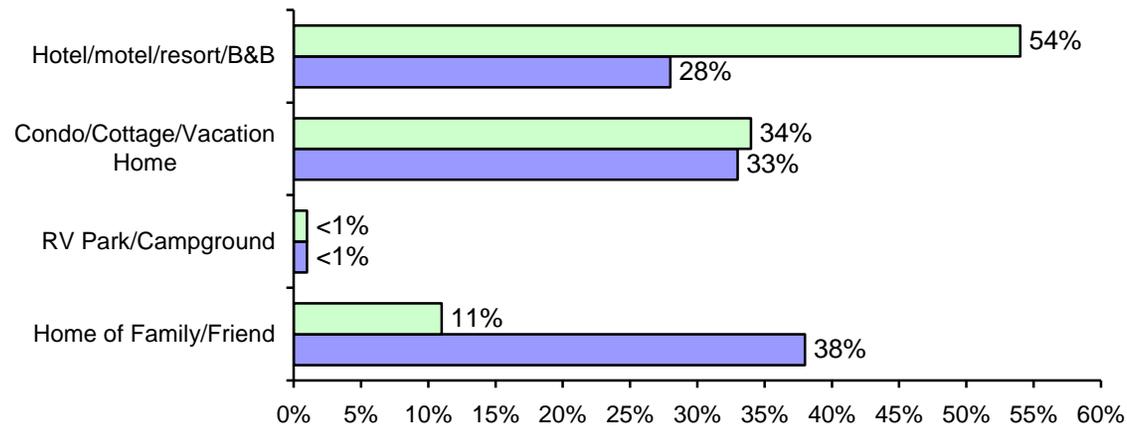


Trip Profile

Type of Accommodations – October Visitors		
	2008	2009
Total Respondents	199	206
Hotel/Motel/Resort/B&B	28%	<54%>
Hotel/motel/inn	18%	<31%>
Resort	9%	<23%>
B&B	--	<1%>
Condo/Cottage/Vacation Home	33%	34%
Rented home/condo	23%	17%
Owned home/condo	2%	<11%>
Borrowed home/condo	7%	5%
RV Park/Campground	<1%>	<1%>
Home of family/friend	<38%>	11%
Day trip (no accommodations)	--	1%

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

Type of Accommodations - October Visitors



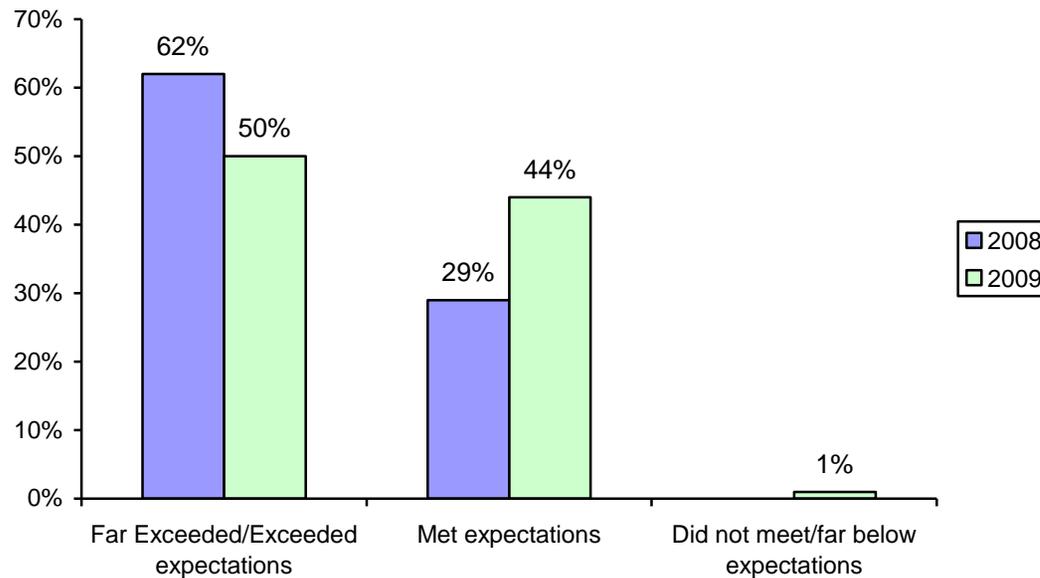


Trip Profile

Quality of Accommodations		
	2008	2009
Total Respondents	199	206
Far exceeded/Exceeded expectations	<62%>	50%
Met expectations	29%	<44%>
Did not meet/Far below expectations	--	1%
No Answer	9%	5%

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

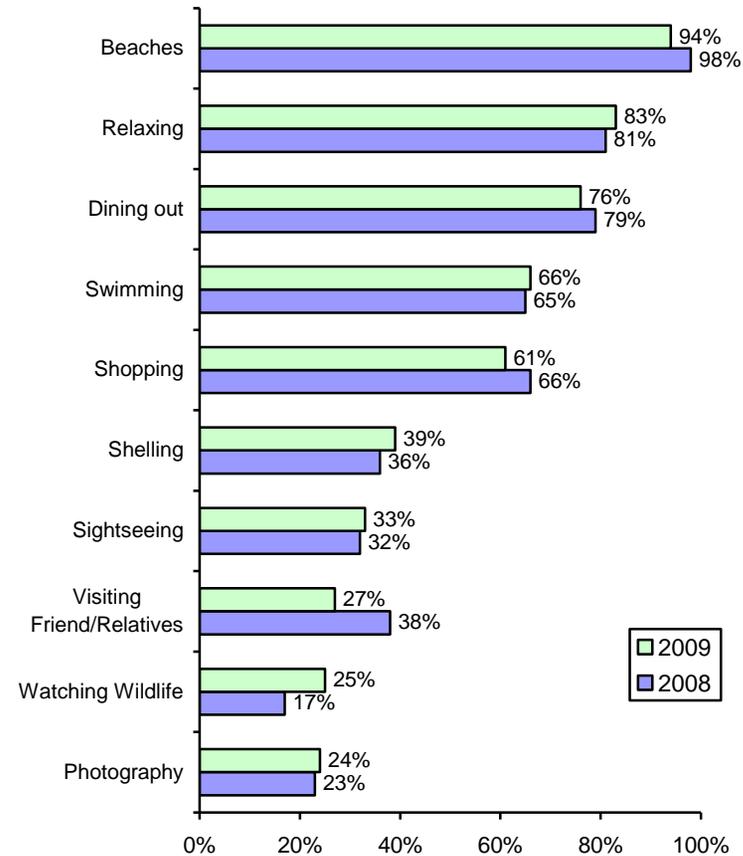
Quality of Accommodations





October Activities Enjoyed		
	2008	2009
Total Respondents	199	206
Beaches	<98%>	94%
Relaxing	81%	83%
Dining out	79%	76%
Swimming	65%	66%
Shopping	66%	61%
Shelling	36%	39%
Sightseeing	32%	33%
Visiting Friends/Relatives	<38%>	27%
Watching Wildlife	17%	25%
Photography	23%	24%
Attractions	<31%>	18%
Birdwatching	13%	16%
Bars/Nightlife	20%	15%
Bicycle Riding	12%	12%
Exercise/Working Out	13%	10%
Fishing	15%	9%
Golfing	14%	8%
Miniature Golf	11%	8%
Boating	13%	7%
Parasailing/Jet Skiing	6%	6%
Kayaking/Canoeing	5%	5%
Cultural Events	3%	4%
Guided Tour	3%	2%
Tennis	4%	2%
Scuba Diving/Snorkeling	3%	1%
Sporting Event	<4%>	1%
Other	2%	4%

Trip Activities



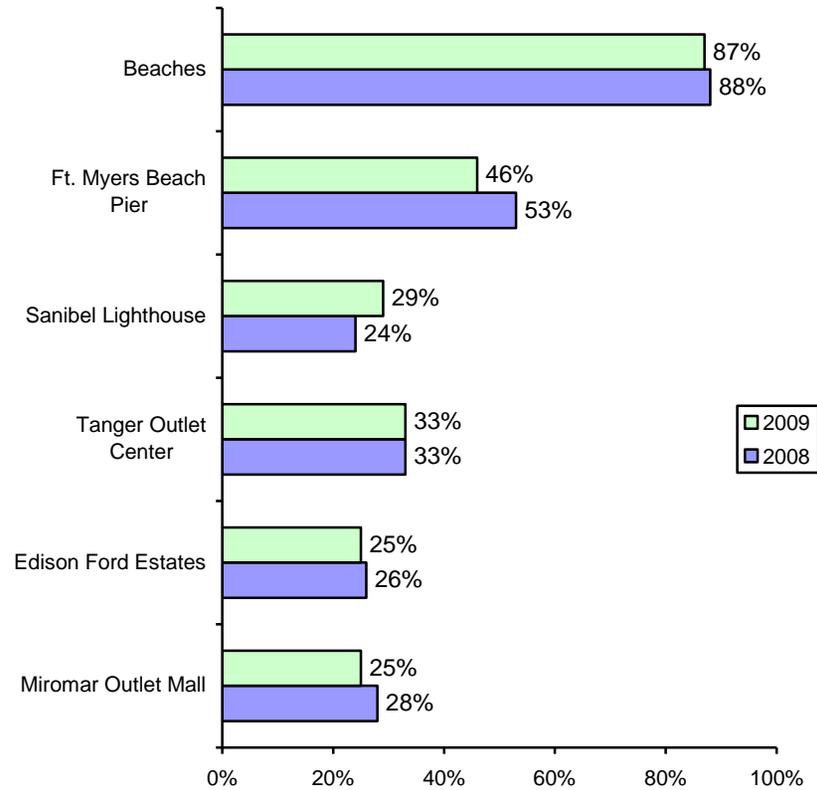
Q28: What activities or interests are you enjoying while in Lee County?
(Please mark ALL that apply.)



October Attractions Visited		
	2008	2009
Total Respondents	199	206
Beaches	88%	87%
Ft. Myers Beach Pier	53%	46%
Tanger Outlet Center (Sanibel)	33%	33%
Sanibel Lighthouse	24%	29%
Edison Ford Estates	26%	25%
Miromar Outlet Mall	28%	25%
Ding Darling National Wildlife Refuge	11%	<22%>
Periwinkle Place	12%	15%
Bell Tower Shops	16%	14%
Edison Mall	18%	14%
Shell Factory and Nature Park	8%	11%
Coconut Point Mall	<18%>	9%
Bailey-Matthews Shell Museum	2%	6%
Gulf Coast Town Center	<13%>	5%
Manatee Park	2%	4%
Broadway Palm Dinner Theater	4%	3%
Barbara B. Mann Performing Arts Hall	<1%>	1%
Babcock Wilderness Adventures	2%	--
Other	7%	3%
None/No Answer	3%	2%

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

Trip Activities

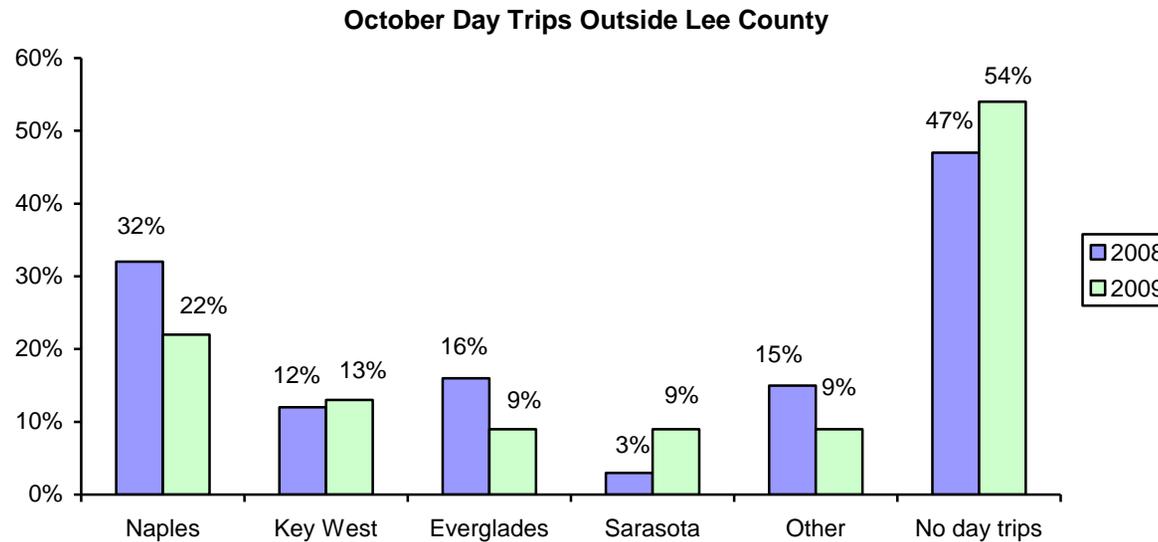




Trip Activities

October Day Trips Outside Lee County		
	2008	2009
Total Respondents	199	206
Any Day Trips (net)	48%	41%
<i>Naples</i>	<32%>	22%
<i>Key West</i>	12%	13%
<i>Everglades</i>	<16%>	9%
<i>Sarasota</i>	3%	<9%>
<i>Other</i>	15%	9%
No day trips	47%	54%
No answer	5%	5%

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



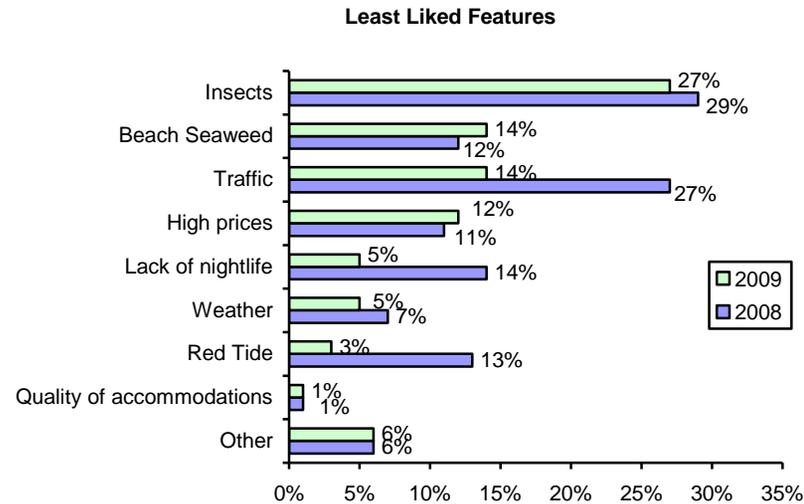


Lee County Experience

Least Liked Features		
	2008	2009
Total Respondents	199	206
Insects	29%	27%
Beach seaweed	12%	14%
Traffic	<27%>	14%
High prices	11%	12%
Lack of nightlife	<14%>	5%
Weather	7%	5%
Red Tide	<13%>	3%
Quality of accommodations	1%	1%
Other	6%	6%
Nothing/no answer	29%	<42%>

Q34: During this specific visit, which features have you liked least about our area? (Please mark ALL that apply.)

Note: Revised question wording introduced in July 2009. Therefore, year-over-year results are not directly comparable.



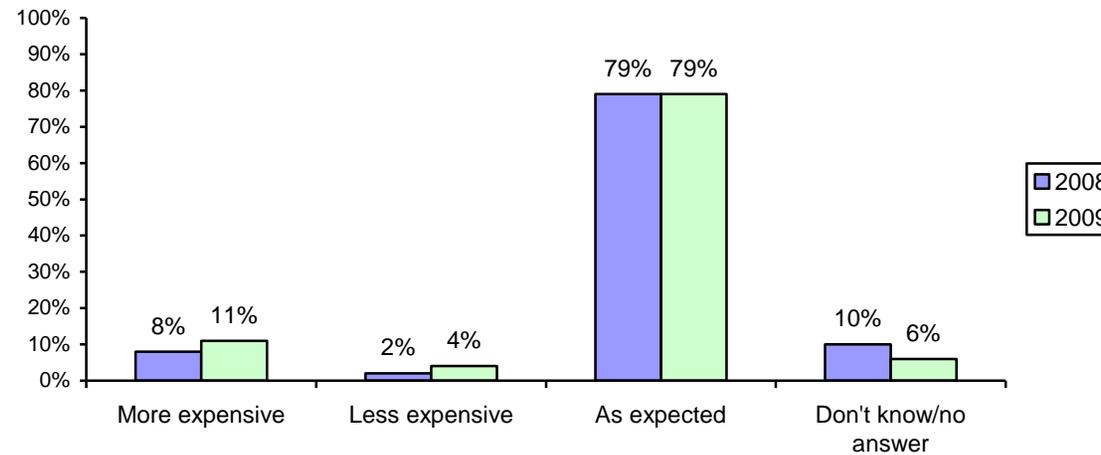


Lee County Experience

Perception of Lee County as Expensive		
	2008	2009
Total Respondents	199	206
More expensive	8%	11%
Less expensive	2%	4%
As expected	79%	79%
Don't know/no answer	10%	6%

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

Perception of Lee County as Expensive

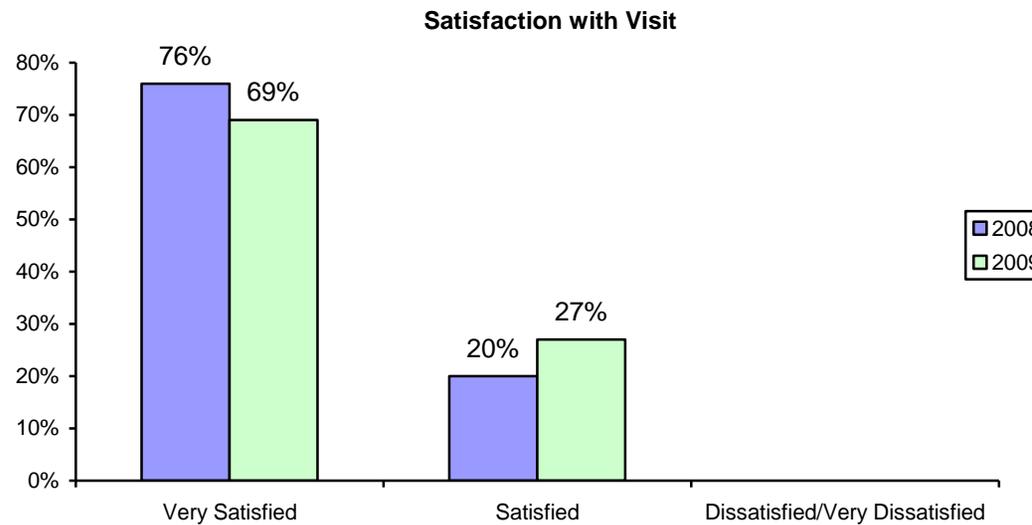




Lee County Experience

Satisfaction with Visit		
	2008	2009
Total Respondents	199	206
Satisfied	96%	95%
<i>Very Satisfied</i>	76%	69%
<i>Satisfied</i>	20%	27%
Neither	1%	2%
Dissatisfied/Very Dissatisfied	--	--
Don't know/no answer	3%	3%

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





Future Plans

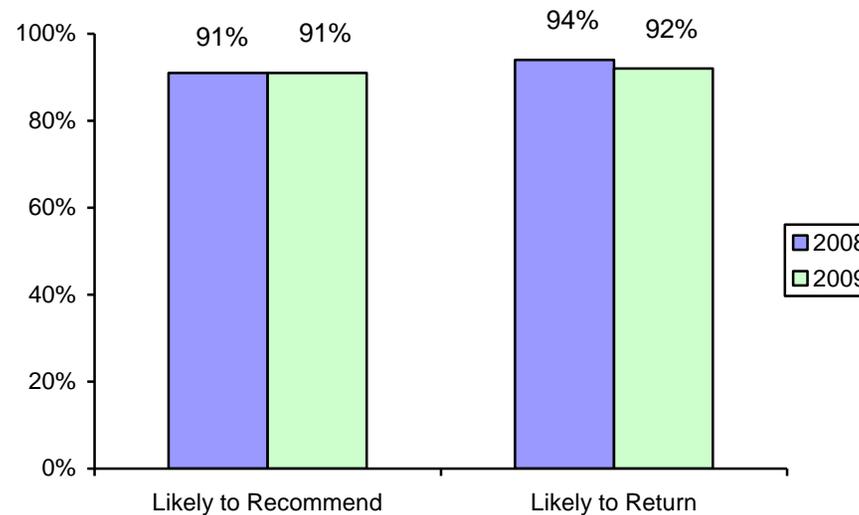
Likelihood to Recommend/Return to Lee County		
	2008	2009
Total Respondents	199	206
Likely to Recommend Lee County	91%	91%
Likely to Return to Lee County	94%	92%
Base: Total Respondents Planning to Return	187	189
Likely to Return Next Year	<67%>	56%

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?

**Likelihood to Recommend/Return to Lee County
 (Responded "Yes")**

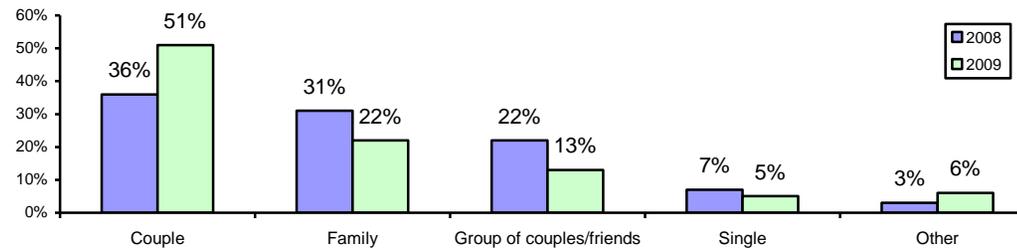




Visitor and Travel Party Demographic Profile

October Travel Party		
	2008	2009
Total Respondents	199	206
Couple	36%	<51%>
Family	31%	22%
Group of couples/friends	<22%>	13%
Single	7%	5%
Other	3%	6%
Mean travel party size	<3.1>	2.7
Mean adults in travel party	<2.7>	2.4

Travel Party



Travel Parties with Children		
	2008	2009
Total Respondents	199	206
Traveling with any Children (net)	23%	17%
Any younger than 6	12%	7%
Any 6 – 11 years old	6%	5%
Any 12 – 17 years old	10%	9%

Q22: On this trip, are you traveling:

Q23: Including yourself, how many people are in your immediate travel party?

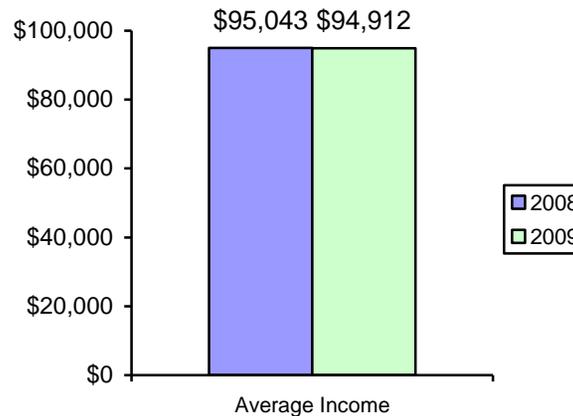
Q24: How many of those people are: Younger than 6 years old/6-11 years old/12-17 years old/Adults



Visitor and Travel Party Demographic Profile

October Visitor Demographic Profile		
	2008	2009
Total Respondents	199	206
Vacations per year (mean)	3.2	3.4
Short getaways per year (mean)	3.4	<4.2>
Age of respondent (mean)	47.7	<52.6>
Annual household income (mean)	\$95,043	\$94,912
Marital Status		
Married	68%	<78%>
Single	15%	9%
Other	13%	10%

Annual Household Income



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



Visitor Origin and Visitation Estimates

Total October Visitation					
	%		Visitor Estimates		% Change 2008-2009
	2008	2009	2008	2009	
Paid Accommodations	41%	68%	143,552	162,250	13.0%
Friends/Relatives	59%	32%	206,829	77,561	-62.5%
<i>Total Visitation</i>			350,381	239,811	-31.6%
October Visitor Origin – Visitors Staying in Paid Accommodations					
	2008	2009	2008	2009	
United States	60%	66%	85,850	107,604	25.3%
Germany	13%	13%	18,296	20,627	12.7%
UK	12%	11%	16,888	17,118	1.4%
Canada	5%	4%	7,037	6,795	-3.4%
Scandinavia	4%	2%	5,629	3,478	-38.2%
Ireland	3%	1%	4,222	2,246	-46.8%
Switzerland	--	1%	--	2,136	--
France	1%	1%	1,407	1,014	-27.9%
Austria	1%	--	1,407	--	--
BeNeLux	1%	--	1,407	--	--
Other	1%	1%	1,407	1,232	-12.4%
U.S. Region (Paid Accommodations)					
	2008	2009	2008	2009	
Florida	10%	13%	8,444	14,436	71.0%
South (including Florida)	18%	36%	15,481	39,146	152.9%
Midwest	38%	42%	32,370	44,843	38.5%
Northeast	25%	18%	21,111	19,452	-7.9%
West	2%	1%	1,407	1,014	-27.9%
No Answer	16%	3%	14,074	3,150	-77.6%
2009 Top DMAs (Paid Accommodations)					
New York			8%	8,712	
Tampa-Saint Petersburg (Sarasota)			7%	7,889	
Indianapolis			7%	7,371	
Columbus, OH			5%	5,425	
Philadelphia			5%	5,285	
Detroit			4%	4,550	
Orlando-Daytona Beach-Melbourne			4%	4,382	
Chicago			3%	3,368	
Minneapolis-Saint Paul			3%	3,367	
Louisville			3%	3,289	



Occupancy Data Analysis October 2009

Property managers representing 142 properties in Lee County were interviewed for the October 2009 Occupancy Survey between October 1 and October 15, 2009, a sample considered accurate to plus or minus 7.9 percentage points at the 95% confidence level.

Property managers representing 144 properties in Lee County were interviewed for the October 2008 Occupancy Survey between November 1 and November 14, 2008, a sample considered accurate to plus or minus 8.2 percentage points at the 95% confidence level.



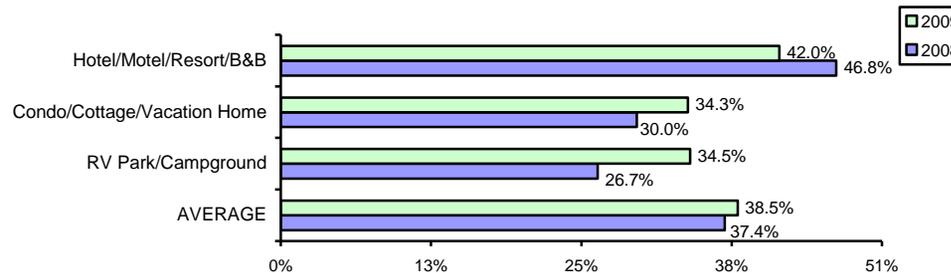
October Occupancy/Daily Rates

	Average Occupancy Rate - %			Average Daily Rate - \$			RevPAR - \$		
	2008	2009	% Change	2008	2009	% Change	2008	2009	% Change
Property Managers Responding	142	136		140	140		142/140	136/140	
Hotel/Motel/Resort/B&B	46.8%	42.0%	-10.2%	\$116.15	\$96.87	-16.6%	\$54.33	\$40.69	-25.1%
Condo/Cottage/Vacation Home	30.0%	34.3%	14.6%	\$121.92	\$135.63	11.2%	\$36.52	\$46.55	27.5%
RV Park/Campground	26.7%	34.5%	29.2%	\$35.23	\$34.34	-2.5%	\$9.41	\$11.85	25.9%
AVERAGE	37.4%	38.5%	3.1%	\$103.13	\$93.43	-9.4%	\$38.56	\$36.01	-6.6%

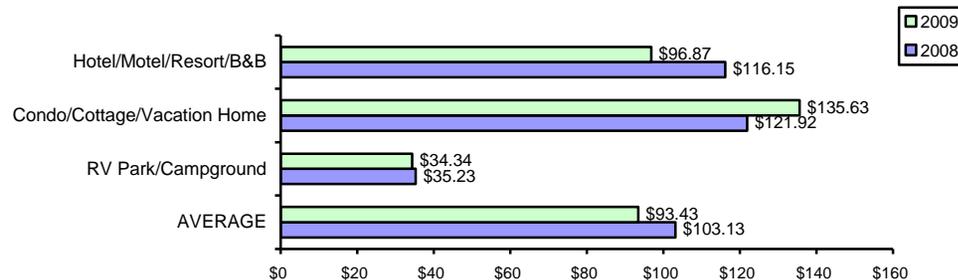
Q16: What was your overall average occupancy rate for the month of October?

Q17: What was your average daily rate (ADR) in October?

Average Occupancy Rate



Average Daily Rate

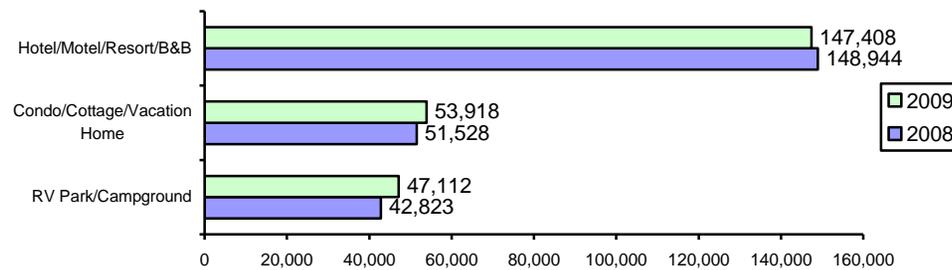




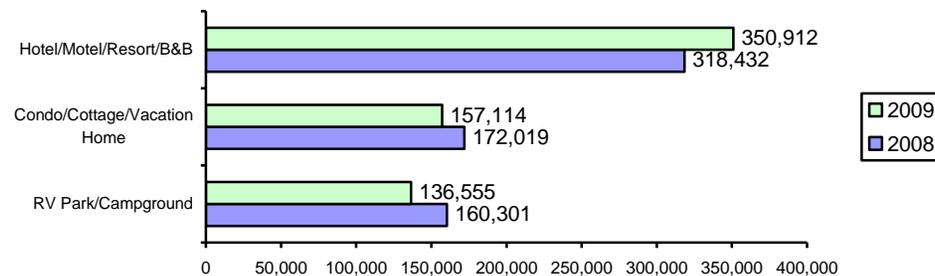
October Room/Unit/Site Nights

	Occupied Room Nights			Available Room Nights		
	2008	2009	% Change	2008	2009	% Change
Hotel/Motel/Resort/B&B	148,944	147,408	-1.0%	318,432	350,912	10.2%
Condo/Cottage/Vacation Home	51,528	53,918	4.6%	172,019	157,114	-8.7%
RV Park/Campground	42,823	47,112	10.0%	160,301	136,555	-14.8%
Total	243,295	248,438	2.1%	650,752	644,581	-0.9%

Occupied Room Nights



Available Room Nights





Lodging Management Estimates

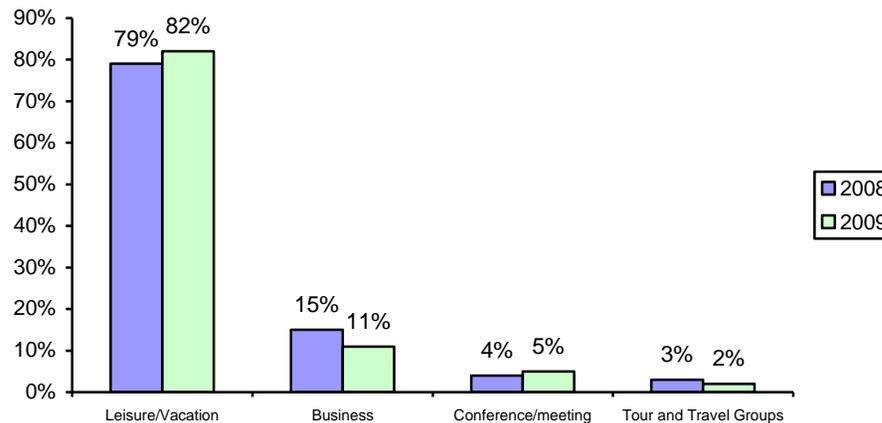
October Guest Profile		
	2008	2009
Property Managers Responding	120	113
Purpose of Visit		
Leisure/Vacation	79%	82%
Business	15%	11%
Conference/meeting	4%	5%
Tour and Travel Groups	3%	2%
Property Managers Responding	132	128
Average guests per room	2.4	2.5
Property Managers Responding	131	125
Average length of stay in nights	6.7	5.0

Q23: What percent of your October room/site/unit occupancy was generated by:

Q18: What was your average number of guests per room/site/unit in October?

Q19: What was the average length of stay (in nights) of your guests in October?

Purpose of Visit



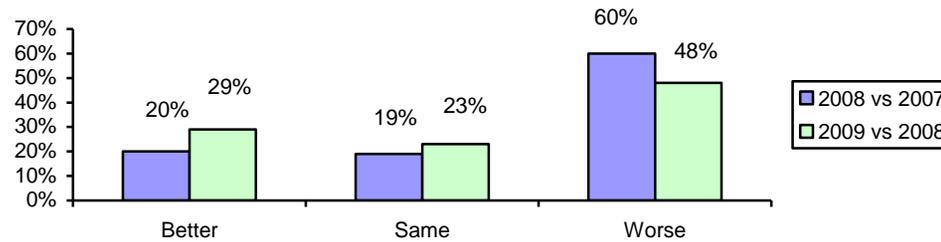


Occupancy Barometer

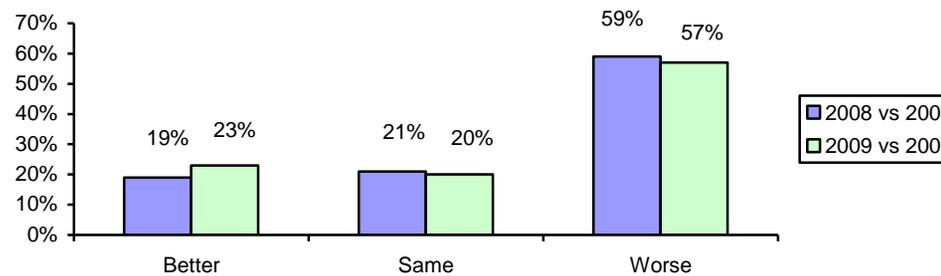
	October Occupancy		October Revenue	
	2008	2009	2008	2009
Property Managers Responding	139	133	135	128
Better than prior year	20%	29%	19%	23%
Same as prior year	19%	23%	21%	20%
Worse than prior year	<60%>	48%	59%	57%

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

October Occupancy



October Revenue



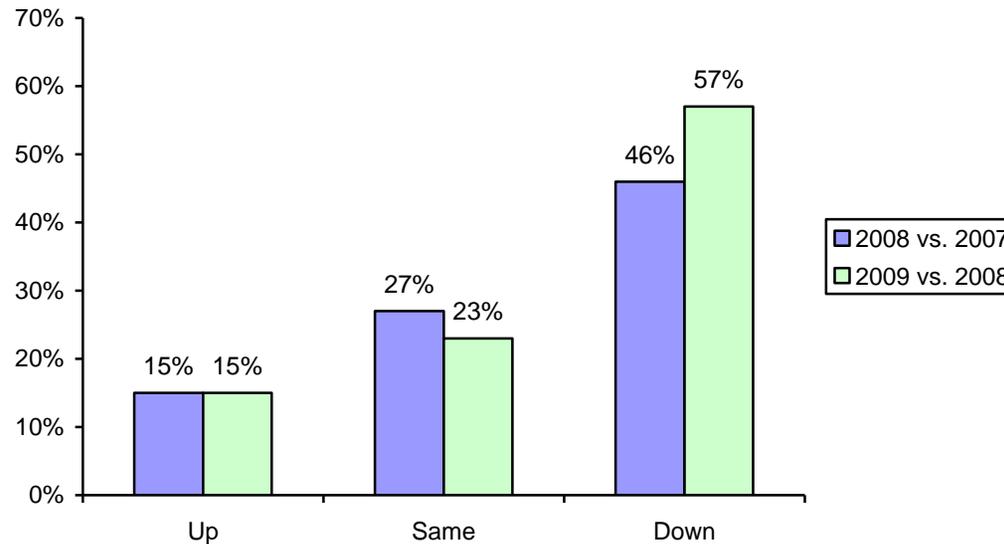


Occupancy Barometer

Level of Reservations for Next 3 Months Compared to Last Year		
	2008	2009
Property Managers Responding	135	133
Up	15%	15%
Same	27%	23%
Down	46%	57%

Q26: Compared to November, December and January of last year, is your property's total level of reservations up, the same, or down for November, December and January of this year?

Level of Reservations for Next 3 Months Compared to Last Year



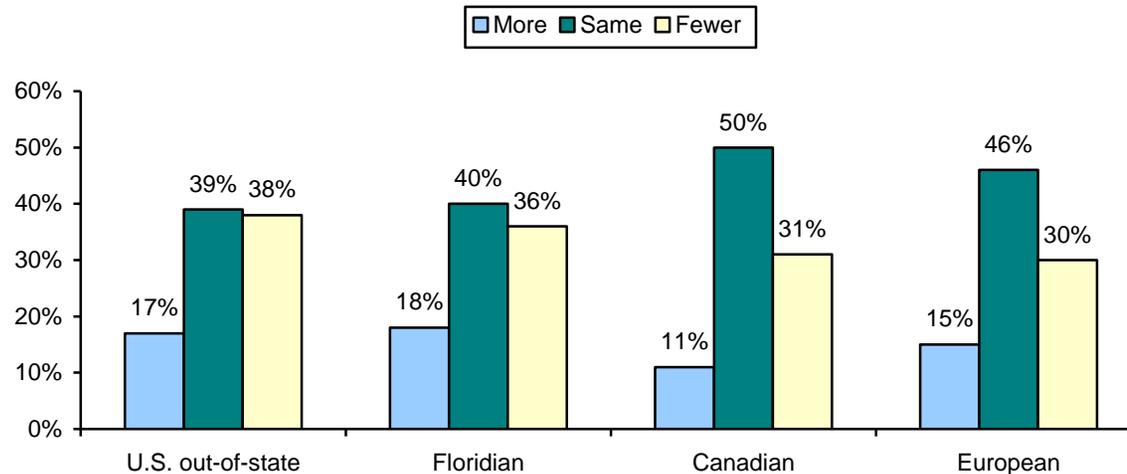


Occupancy Barometer

Origin of Guests for Next 3 Months Compared to Last Year								
Property Managers Responding (117/106 Minimum)	More		Same		Fewer		Not Applicable	
	2008	2009	2008	2009	2008	2009	2008	2009
U.S. out-of-state	14%	17%	39%	39%	41%	38%	6%	6%
Floridian	19%	18%	47%	40%	26%	36%	7%	7%
Canadian	16%	11%	31%	<50%>	43%	31%	11%	8%
European	24%	15%	32%	<46%>	34%	30%	10%	9%

Q27: Now thinking about the specific origins of your guests for the upcoming November, December and January 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
October 2009



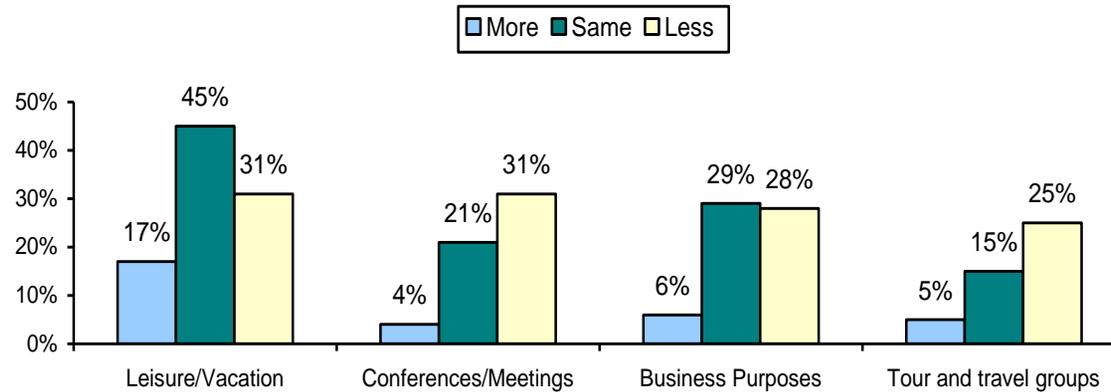


Occupancy Barometer

Type of Travelers for Next 3 Months Compared to Last Year								
Property Managers Responding (67/106 Minimum)	More		Same		Less		Not Applicable	
	2008	2009	2008	2009	2008	2009	2008	2009
Leisure/vacation	<28%>	17%	36%	45%	30%	31%	6%	8%
Conferences/Meetings	--	4%	28%	21%	35%	31%	37%	44%
Business Purposes	4%	6%	31%	29%	34%	28%	31%	37%
Tour and travel groups	3%	5%	21%	15%	33%	25%	43%	56%

Q28: Compared to November, December and January of last year will the following types of travelers generate more, the same, or less business for your property for the upcoming November, December and January?

Type of Travelers for Next 3 Months Compared to Last Year October 2009





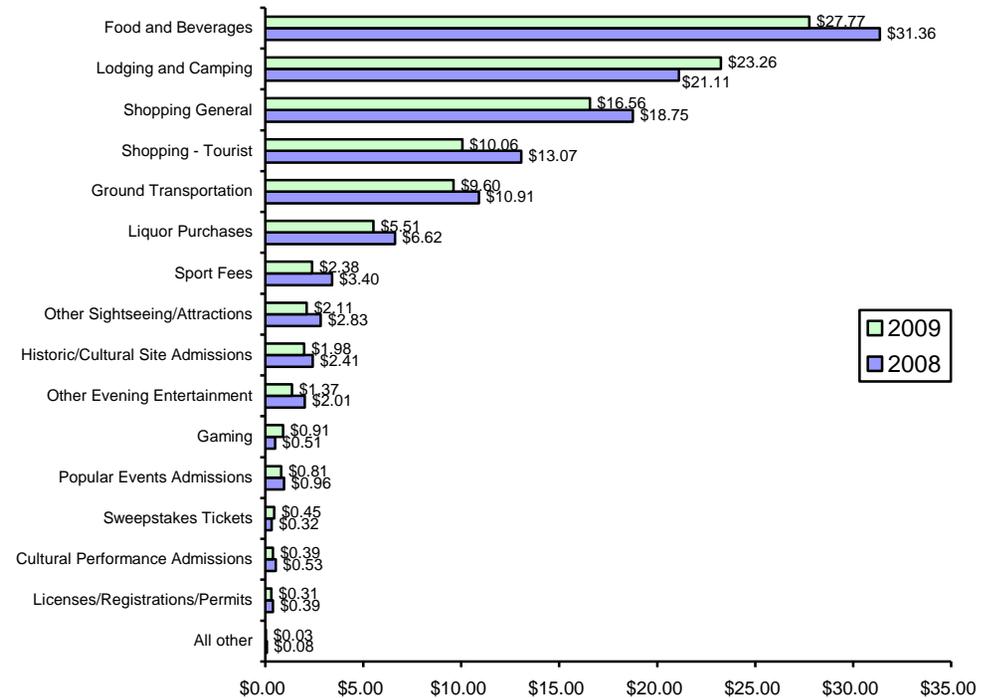
Economic Impact Analysis October 2009



Average Expenditures

October Average Expenditures per Person per Day			
	2008	2009	% Change
TOTAL	\$115.24	\$103.13	-10.5%
Food and Beverages	\$31.36	\$27.77	-11.4%
Lodging Accommodations	\$21.11	\$23.26	10.2%
Shopping-General	\$18.75	\$16.56	-11.7%
Shopping-Tourist	\$13.07	\$10.06	-23.0%
Ground Transportation	\$10.91	\$9.60	-12.0%
Liquor Purchases	\$6.62	\$5.15	-22.2%
Sport Fees	\$3.40	\$2.38	-30.0%
Other Sightseeing/Attractions	\$2.83	\$2.11	-25.4%
Historic/Cultural Site Admissions	\$2.41	\$1.98	-17.8%
Other Evening Entertainment	\$2.01	\$1.37	-31.8%
Gaming	\$0.51	\$0.91	78.4%
Popular Events Admissions	\$0.96	\$0.81	-15.6%
Sweepstakes Tickets	\$0.32	\$0.45	40.6%
Cultural Performance Admissions	\$0.53	\$0.39	-26.4%
Licenses/Registrations/Permits	\$0.39	\$0.31	-20.5%
All Other	\$0.08	\$0.03	-62.5%

Average Expenditures per Person per Day

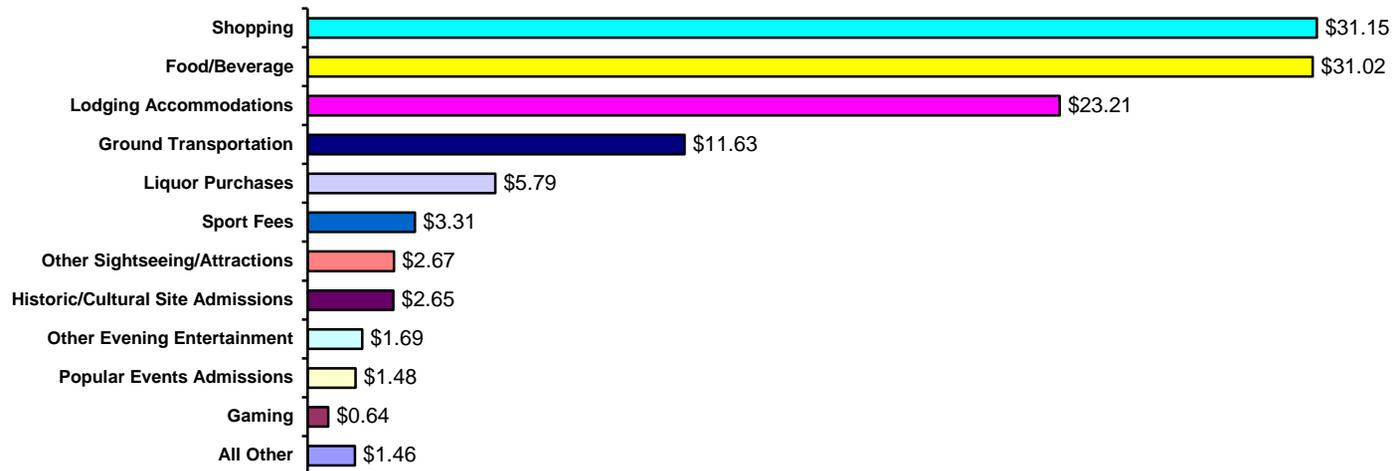




Total Visitor Expenditures by Spending Category

	OCTOBER TOTAL EXPENDITURES		
	2008	2009	% Change
TOTAL	\$193,838,104	\$116,717,096	-39.8%
Shopping	\$59,598,873	\$31,152,615	-47.7%
Food and Beverages	\$52,624,266	\$31,021,309	-41.1%
Lodging Accommodations	\$25,089,960	\$23,210,656	-7.5%
Ground Transportation	\$19,733,857	\$11,632,543	-41.1%
Liquor Purchases	\$11,912,390	\$5,793,549	-51.4%
Sport Fees	\$4,538,110	\$3,314,527	-27.0%
Other Sightseeing/Attractions	\$4,929,047	\$2,672,521	-45.8%
Historic/Cultural Site Admissions	\$5,320,340	\$2,645,621	-50.3%
Other Evening Entertainment	\$4,319,474	\$1,691,965	-60.8%
Popular Events Admissions	\$2,262,260	\$1,479,086	-34.6%
Gaming	\$1,325,111	\$643,893	-51.4%
All Other	\$2,184,416	\$1,458,811	-33.2%

October 2009 Total Expenditures
(Millions)





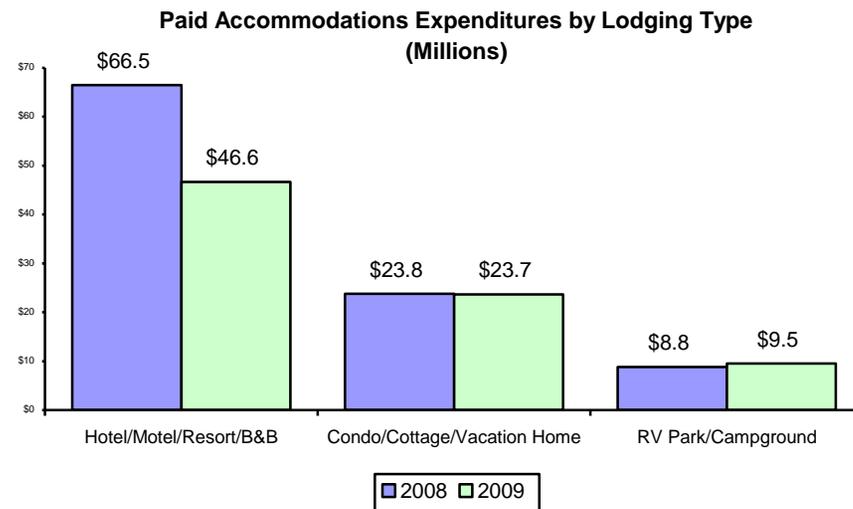
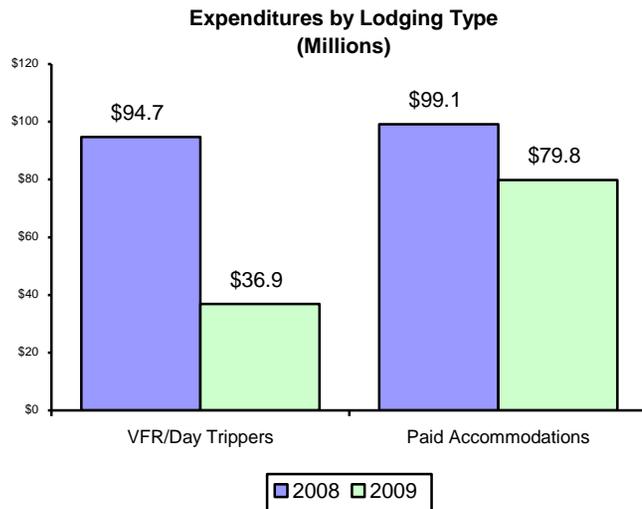
Total Visitor Expenditures by Spending Category

	ALL PROPERTIES					
	Staying in Paid Accommodations			Visiting Friends and Relatives/ Day Trippers		
	2008	2009	% Change	2008	2009	% Change
TOTAL	\$99,095,816	\$79,817,387	-19.5%	\$94,742,288	\$36,899,709	-61.1%
Lodging Accommodations	\$25,089,960	\$23,210,656	-7.5%	\$0	\$0	--
Shopping	\$28,329,266	\$19,302,012	-31.9%	\$31,269,607	\$11,850,603	-62.1%
Food and Beverages	\$21,516,395	\$19,124,386	-11.1%	\$31,107,871	\$11,896,923	-61.8%
Ground Transportation	\$8,030,154	\$7,171,467	-10.7%	\$11,703,703	\$4,461,076	-61.9%
Liquor Purchases	\$4,722,002	\$3,283,024	-30.5%	\$7,190,388	\$2,510,525	-65.1%
Sport Fees	\$2,787,656	\$1,823,833	-34.6%	\$1,750,454	\$1,490,694	-14.8%
Other Sightseeing/Attractions	\$2,456,637	\$1,569,095	-36.1%	\$2,472,410	\$1,103,426	-55.4%
Historic/Cultural Site Admissions	\$2,137,107	\$1,453,926	-32.0%	\$3,183,233	\$1,191,695	-62.6%
Other Evening Entertainment	\$1,572,478	\$945,137	-39.9%	\$2,746,996	\$746,828	-72.8%
Gaming	\$462,035	\$622,453	34.7%	\$863,076	\$21,440	-97.5%
Popular Events Admissions	\$987,871	\$585,608	-40.7%	\$1,274,389	\$893,478	-29.9%
All Other	\$1,004,255	\$725,790	-27.7%	\$1,180,161	\$733,021	-37.9%



Total Visitor Expenditures by Lodging Type

October Total Expenditures by Lodging Type					
	2008	2009	% Change	2008	2009
TOTAL	\$193,838,104	\$116,717,096	-39.8%	100%	100%
Visiting Friends & Relatives/Day Trippers	\$94,742,288	\$36,899,709	-61.1%	49%	32%
Paid Accommodations	\$99,095,816	\$79,817,387	-19.5%	51%	68%
<i>Hotel/Motel/Resort/B&B</i>	\$66,509,772	\$46,635,899	-29.9%	34%	40%
<i>Condo/Cottage/Vacation Home</i>	\$23,815,799	\$23,681,670	-0.6%	12%	20%
<i>RV Park/Campground</i>	\$8,770,245	\$9,499,818	8.3%	5%	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.



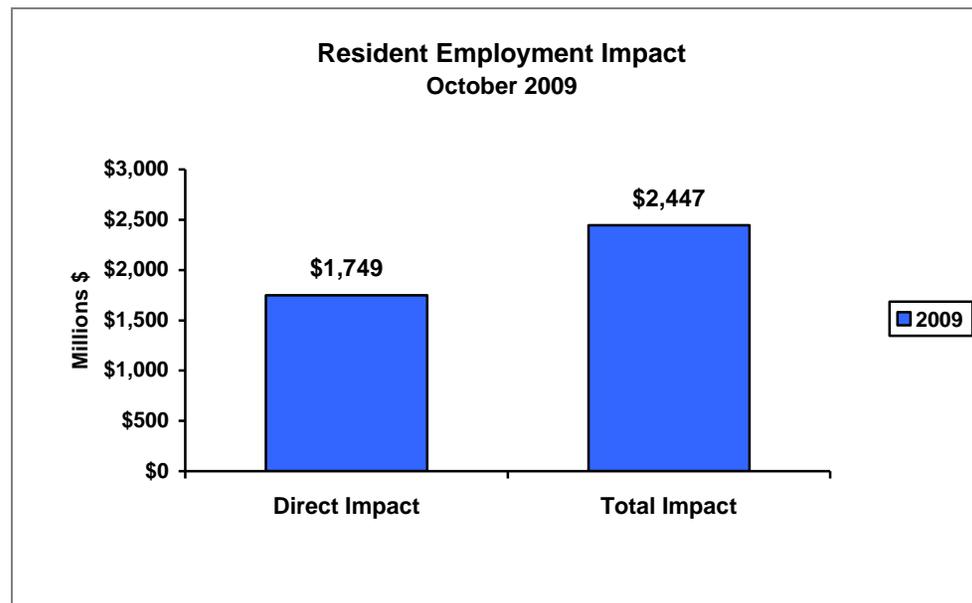
Impact on Jobs for Lee County Residents

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.

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

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





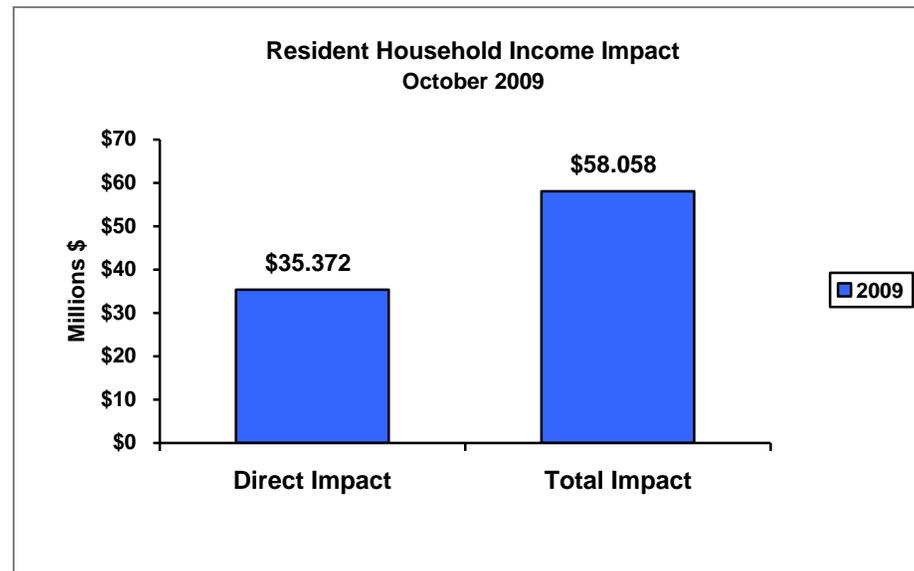
Impact on Household Income for Lee County Residents

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

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

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

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





Impact on State and Local Government Revenues

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

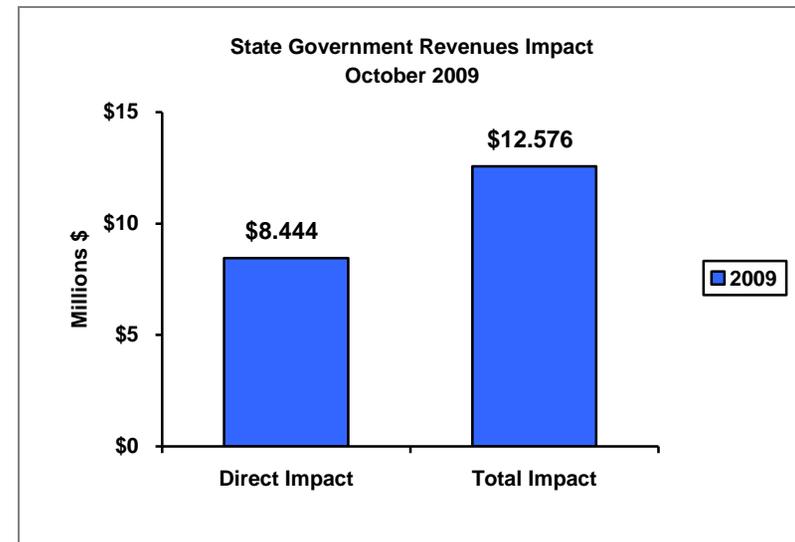
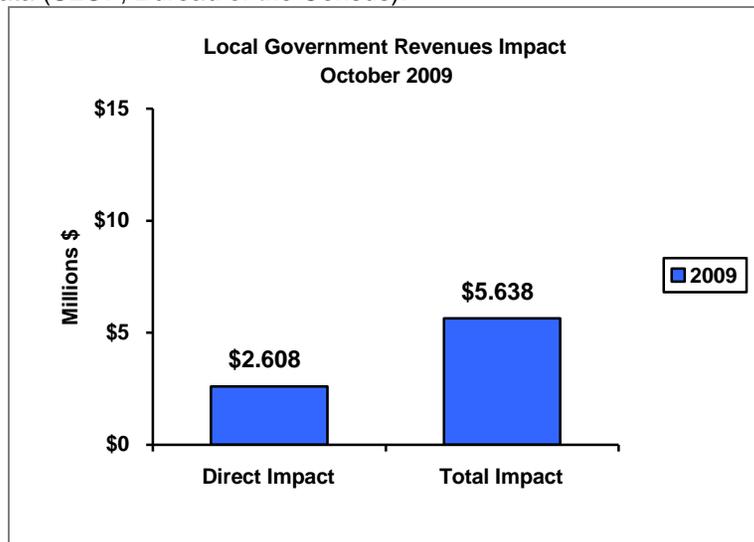
The gross government revenues accruing to governments as a result of producing the output purchased with visitor expenditures is the government revenue impact.

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

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

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

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





Appendix October 2009



October 2009 Interviewing Statistics

Visitor Profile Interviewing Statistics			
City	Event/Location	Interviewing Dates	Number of Interviews*
Sanibel	Holiday Inn	6-October	6
Sanibel	Loggerhead Cay	6-October	6
Sanibel	Sanibel Inn	6-October	6
Sanibel	Tortuga Beach Club	6-October	6
Sanibel	Sanibel Moorings	6-October	6
Fort Myers Beach	Diamond Head Resort	8-October	8
Fort Myers Beach	Estero Island Beach Resort	8-October	11
Fort Myers Beach	Lana Kai	8-October	5
Fort Myers Beach	Neptune Inn	8-October	8
Fort Myers	Best Western	10-October	9
Bonita Springs	Bonita Beach	10-October	14
Cape Coral	Cape Coral Yacht Club	10-October	7
Fort Myers Beach	The Pier	17-October	12
Fort Myers Beach	Times Square	17-October	12
Sanibel	Casa Ybel	20-October	12
Sanibel	Ocean Reach	20-October	5
Sanibel	Pointe Santo	20-October	12
Bonita Springs	Dog Beach	22-October	13
Fort Myers	Hilton Garden Inn	22-October	9
Fort Myers	Edison Estates	28-October	27
North Fort Myers	Shell Factory	29-October	12
TOTAL			206

* The sample of surveys was balanced to provide an appropriate representation of interviews across Lee County for October.



Occupancy Interviewing Statistics

Interviews were conducted from October 1 – October 15 2009. Information was provided by 142 Lee County lodging properties.

October 2009

Lodging Type	Number of Interviews
Hotel/Motel/Resort/B&B	90
Condo/Cottage/Vacation Home/Timeshare	36
RV Park/Campground	16
Total	142