



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

**September 2009 Visitor Profile and Occupancy Analysis
November 13, 2009**

Prepared for:

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

Prepared by:



providing direction in travel & tourism



Executive Summary September 2009

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



Executive Summary

Visitor Estimates

- Lee County hosted nearly 150,000 visitors staying in paid accommodations during the month of September 2009, and just over 100,000 staying with friends or relatives while visiting the County, for a total of 249,807 visitors.
- Total visitation in September 2009 was down slightly from September 2008 (-4.8%), driven by the substantial decrease in those staying with friends and relatives (-32.8%). Visitation among those staying in paid accommodations increased significantly (+37.2%), lessening the overall decline.
- More than two-thirds of September 2009 visitors staying in paid accommodations were U.S. residents (71%), a significantly higher proportion than in September 2008 (43%). The prevalence of September visitors from Germany was substantially lower year-over-year (13% vs. 27% September 2008). Lee County also had a lower share of visitors from the United Kingdom (5% vs. 14% September 2008).
- Slightly fewer than half of U.S. visitors staying in paid accommodations during September 2009 came from the South (45%), with one-third of those being Florida residents (31%), representing a substantial increase from last September when 33% were from the South and 15% from Florida. Additionally, one-third of September 2009 visitors hailed from the Midwest, 15% from the Northeast, and 4% from the West.

Visitor Expenditures

- The average per person per day expenditure was \$100.27 in September 2009 – an 8.1% decline from September 2008 (\$109.12). The September average expenditure was about the same as that in August 2009 (\$102.13).
- Total visitor expenditures for September 2009 are estimated at \$100 million, a 19.6% drop from \$124 million in September 2008. Expenditures among those staying in paid accommodations increased 2% from September 2008 to September 2009. However, September 2009 expenditures among those staying with friends and relatives decreased substantially compared to September 2008 (39.4%), due to a decrease in the number of visitors as well as in the average expenditures per person per day.



Total September Visitation					
	%		Visitor Estimates		% Change 2008-2009
	2008	2009	2008	2009	
Paid Accommodations	40%	<58%>	104,967	144,042	37.2%
Friends/Relatives	<60%>	42%	157,472	105,765	-32.8%
<i>Total Visitation</i>			262,439	249,807	-4.8%
September Visitor Origin – Visitors Staying in Paid Accommodations					
	2008	2009	2008	2009	
United States	43%	<71%>	44,855	102,072	127.6%
Germany	<27%>	13%	28,173	18,813	-33.2%
UK	<14%>	5%	14,767	7,440	-49.6%
Switzerland	1%	3%	947	4,031	325.7%
BeNeLux	3%	2%	3,300	3,312	0.4%
France	1%	2%	1,485	2,208	48.7%
Scandinavia	2%	1%	2,225	1,986	-10.8%
Canada	6%	1%	5,914	1,949	-67.1%
Ireland	3%	1%	3,300	1,104	-66.5%
Other	--	1%	--	1,007	--
U.S. Region (Paid Accommodations)					
	2008	2009	2008	2009	
Florida	15%	<31%>	6,901	31,329	354.0%
South (including Florida)	33%	45%	14,664	45,478	210.1%
Midwest	37%	34%	16,389	34,361	109.7%
Northeast	15%	15%	6,901	15,159	119.7%
West	2%	4%	863	4,042	368.4%
No Answer	14%	3%	6,038	3,032	-49.8%

2009 Top DMAs (Paid Accommodations)		
West Palm Beach-Fort Pierce	9%	9,285
Tampa-Saint Petersburg (Sarasota)	8%	8,542
Indianapolis	7%	7,012
New York	7%	6,942
Miami-Fort Lauderdale	6%	5,830
Orlando-Daytona Beach-Melbourne	4%	4,140
Chicago	4%	3,910
Pittsburgh	4%	3,910
Jacksonville	3%	2,966
Philadelphia	3%	2,966



Trip Planning

- September 2009 visitors were less likely to plan a last-minute Lee County trip than in September 2008. Only 8% of September 2009 visitors said they chose Lee County for their trip less than a month beforehand versus 16% among September 2008 visitors.
- When deciding to visit Lee County, September 2009 visitors were most likely to say they were influenced by the following attributes:
 - Peaceful/relaxing (84%)
 - Warm weather (80%)
 - Clean environment (75%)
 - White sandy beaches (74%)
 - Safe destination (73%)

This response pattern was similar to that of September 2008 visitors, but *white sandy beaches* was an influential attribute for a smaller proportion of September 2009 visitors (74%) than for September 2008 visitors (84%).

Visitor Profile

- September 2009 visitors were less likely to fly to the area than were visitors in the September prior (62% vs. 73% September 2008). Such a shift is to be expected given the decline in international visitors (fly market) as well as the increase in in-state visitors (drive market).
- While the average number of days spent away from home and in Florida was slightly shorter in September 2009 than in September 2008, the average length of stay in Lee County was about the same year-over-year (7.6 vs. 8.5 September 2008).
- Slightly more September 2009 visitors said they were staying in a hotel/motel (46%) than were staying in a condo/vacation home (41%). A higher proportion of visitors in September 2009 stayed in their own home/condo than in the prior year (14% vs. 6% September 2008). One visitor in ten said they were staying at the home of friend or family member (12%). Half felt that the quality of accommodations *far exceeded or exceeded their expectations* (50%).
- The top activities enjoyed while in Lee County during September 2009 were *beaches, relaxing, swimming, and dining out*. Visitor satisfaction remains extremely high, with 93% of September 2009 visitors reporting being *very satisfied* (65%) or *satisfied* (28%) with their visit. The vast majority indicated they were likely to return to Lee County (87%), and half of those are likely to return next year (56%).



- Similar to last year, the least liked feature about the Lee County area among September 2009 visitors was *insects* (37%) with *beach seaweed* (21%) following as a distant second. Visitors' concerns about *weather* (5%) and *red tide* (3%) were less prevalent during September 2009 than the prior year (14% each).
- The year-over-year decline in visitors staying with friends or family led to some differentiations in the profile of visitors. September 2009 visitors were less likely than September 2008 visitors to indicate:
 - Visiting friends/relatives as their trip purpose (15% vs. 27%); and
 - Staying at the home of family/friend as their accommodation type (12% vs. 26%).
- In general, the demographic characteristics of visitors and their travel parties did not differ substantially between September 2008 and September 2009. September 2009 visitors averaged 49 years of age, with an average household income of approximately \$95,000. However, September 2009 visitors were more likely than September 2008 visitors to be married (75% vs. 64% September 2008)



Lodging Property Manager Assessments

- Overall, the number of *available* room nights was about the same in September 2009 as in the September prior. Notably, *occupied* room nights increased by 18.1% – having rebounded from September 2008 losses in *occupied* room nights and returned to levels consistent with September 2007 or higher. Hotel/motel/resort *available* room nights were up 5.1% from a year ago and occupied room nights also rose 8.6% – primarily the result of an expansion in the lodging universe. Properties in the condo/vacation home and RV park/campground categories both saw a slight drop 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	119,629	129,927	8.6%	321,930	338,439	5.1%
Condo/Cottage/Vacation Home	27,102	31,568	16.5%	159,870	153,630	-3.9%
RV Park/Campground	24,384	40,647	66.7%	141,660	138,900	-1.9%
Total	171,115	202,142	18.1%	623,460	630,969	1.2%

- Accordingly, September 2009 saw an increase in average occupancy rates (+16.4%). Average occupancy rates increased from September 2008 (27.5%) to an average of 32.0%. **All categories of accommodations experienced increases in occupancy rates.**
- Overall average daily rates continued to suffer, dropping from \$96.52 in September 2008 to \$87.11 in September 2009 (-9.8%). ADR decreases were present in hotel/motel properties (-11.5%), while condos/vacation homes and RV parks/campgrounds had an increase in ADR over last year.
- The decrease in ADR for hotel/motel properties caused RevPAR to decline as well despite the increase in occupancy rates. For condos/vacation homes and RV parks/campgrounds, September 2009 increases in both occupancy rates and ADR buoyed RevPAR significantly over the same period last year. The net effect was an overall RevPAR increase of 5.4% across all categories combined.

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2008	2009	% Change	2008	2009	% Change	2008	2009	% Change
Property Managers Responding	131	138		132	142		131/132	138/142	
Hotel/Motel/Resort/B&B	37.2%	38.4%	3.2%	\$103.02	\$91.17	-11.5%	\$38.28	\$35.00	-8.6%
Condo/Cottage/Vacation Home	17.0%	20.6%	21.2%	\$128.25	\$131.25	2.3%	\$21.74	\$26.97	24.1%
RV Park/Campground	17.2%	29.3%	70.3%	\$29.37	\$39.84	35.7%	\$5.05	\$11.66	130.9%
AVERAGE	27.5%	32.0%	16.4%	\$96.52	\$87.11	-9.8%	\$26.49	\$27.91	5.4%



- Property managers in September 2009 were more positive than they had been in September 2008 when comparing the current month's *occupancy* and *revenue* to the same month prior year. More than one-third reported their *occupancy* was better than the prior year (37% September 2009 vs. 7% September 2008). Similarly, one-third reported their *revenue* was better than the prior year (32% September 2009 vs. 8% September 2008). In contrast, only half of property managers felt their September 2009 *occupancy* and *revenue* were worse than same month last year with about 70% reporting it worse in September 2008.
- A gloomy outlook for the near future persists based on property managers' projections for business in the next three months (October through December). Slightly more than half (56%) of property managers said their reservations for the next three months were down while only 39% reported better or same – comparable to projections made in September 2008.



September 2009 Lee County Snapshot

Total September Visitation				
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Scandinavia	2%	1%	2,225	1,986
Canada	6%	1%	5,914	1,949
Ireland	3%	1%	3,300	1,104
Other	--	1%	--	1,007

Total Visitor Expenditures			
	2008	2009	% Change
Total Visitor Expenditures	\$124,431,421	\$100,102,794	-19.6%
Paid Accommodations	\$60,026,032	\$61,103,839	1.8%

Average Per Person Per Day Expenditures		
2008	2009	% Change
\$109.12	\$100.27	-8.1%

First-Time/Repeat Visitors to Lee County		
	2008	2009
First-time	<39%>	30%
Repeat	61%	67%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2008	2009	% Change	2008	2009	% Change	2008	2009	% Change
Property Managers Responding	131	138		132	142		131/132	138/142	
Hotel/Motel/Resort/B&B	37.2%	38.4%	3.2%	\$103.02	\$91.17	-11.5%	\$38.28	\$35.00	-8.6%
Condo/Cottage/Vacation Home	17.0%	20.6%	21.2%	\$128.25	\$131.25	2.3%	\$21.74	\$26.97	24.1%
RV Park/Campground	17.2%	29.3%	70.3%	\$29.37	\$39.84	35.7%	\$5.05	\$11.66	130.9%
AVERAGE	27.5%	32.0%	16.4%	\$96.52	\$87.11	-9.8%	\$26.49	\$27.91	5.4%



Visitor Profile Analysis September 2009

A total of 205 interviews were conducted with visitors in Lee County during the month of September 2009. A total sample of this size is considered accurate to plus or minus 6.6 percentage points at the 95% confidence level.

A total of 199 interviews were conducted with visitors in Lee County during the month of September 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.



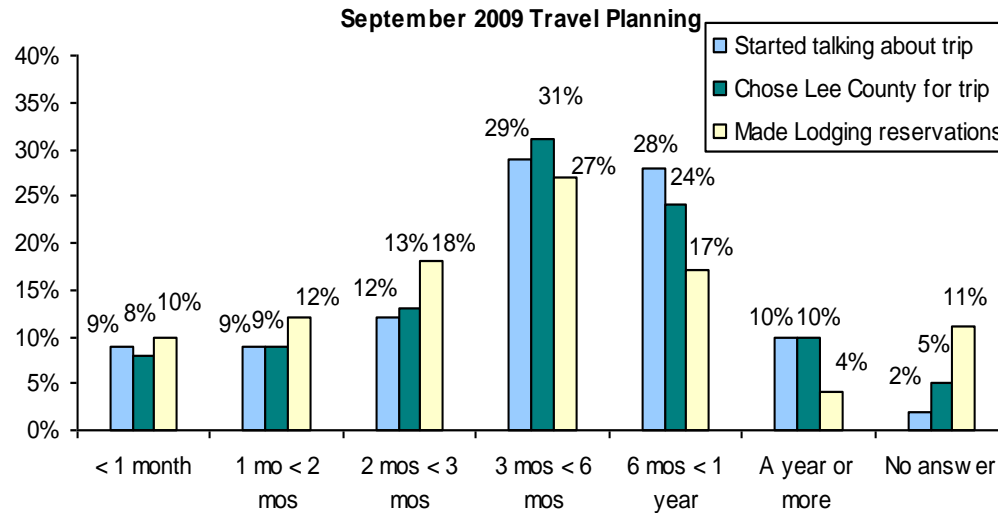
Travel Planning

	Started Talking About Trip		Chose Lee County for Trip		Made Lodging Reservations	
	2008	2009	2008	2009	2008	2009
Total Respondents	199	205	199	205	199	205
< 1 month	9%	9%	<16%>	8%	13%	10%
1 mo - < 2 mos	10%	9%	8%	9%	9%	12%
2 mos - < 3 mos	10%	12%	10%	13%	12%	18%
3 mos - < 6 mos	30%	29%	25%	31%	24%	27%
6 mos - < 1 year	31%	28%	25%	24%	22%	17%
A year or more	7%	10%	9%	10%	4%	4%
No answer	4%	2%	7%	5%	16%	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		
	September	
	2008	2009
Total Respondents	199	205
Before leaving home	77%	84%
After arriving in FL	9%	6%
On the road, but not in FL	<1%	--
No answer	14%	10%

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

Computer Access		
	September	
	2008	2009
Total Respondents	199	205
Yes	91%	92%
<i>Home</i>	28%	25%
<i>Work</i>	1%	2%
<i>Both Home and Work</i>	63%	65%
No	7%	6%

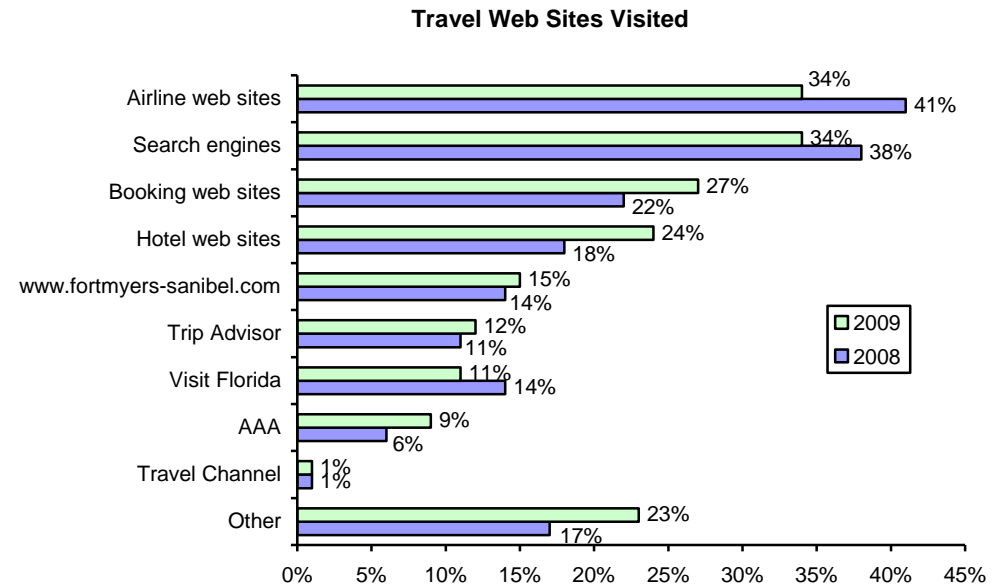
Q8: Do you have access to a computer?



Travel Planning

Travel Web Sites Visited by September Travelers		
	2008	2009
Total Respondents with computer access	182	189
Visited web sites (net)	82%	83%
<i>Airline web sites</i>	41%	34%
<i>Search engines</i>	38%	34%
<i>Booking web sites</i>	22%	27%
<i>Hotel web sites</i>	18%	24%
<i>www.fortmyers-sanibel.com</i>	14%	15%
<i>Trip Advisor</i>	11%	12%
<i>Visit Florida</i>	14%	11%
<i>AAA</i>	6%	9%
<i>Travel Channel</i>	1%	1%
<i>Other</i>	17%	23%
Did not visit web sites	12%	14%
No Answer	6%	3%

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



Base: Respondents with Computer Access

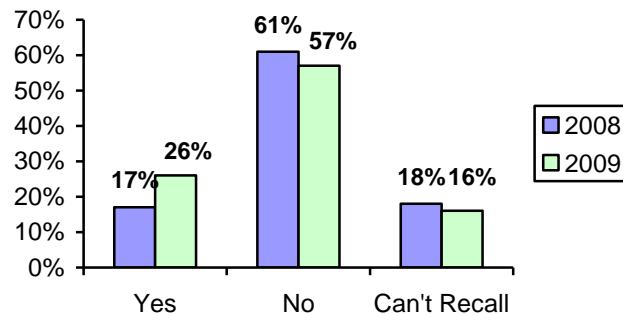


Travel Planning

September Travelers Requesting Information		
	2008	2009
Total Respondents	199	205
Requested Information (net)	30%	32%
Hotel Web Site	10%	14%
VCB Web Site	8%	7%
Call hotel	2%	5%
Visitor Guide	5%	5%
Call local Chamber of Commerce	1%	1%
Clipping/mailling coupon	1%	<1%
Call VCB	1%	<1%
Magazine Reader Service Card	1%	--
Other	9%	11%
Did not request information	54%	58%
No Answer	16%	10%

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

Recall of Promotions



Travel Agent Assistance		
	2008	2009
Total Respondents	199	205
Yes	11%	7%
No	85%	91%

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

Recall of Lee County Promotions		
	2008	2009
Total Respondents	199	205
Yes	17%	<26%>
No	61%	57%
Can't Recall	18%	16%

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



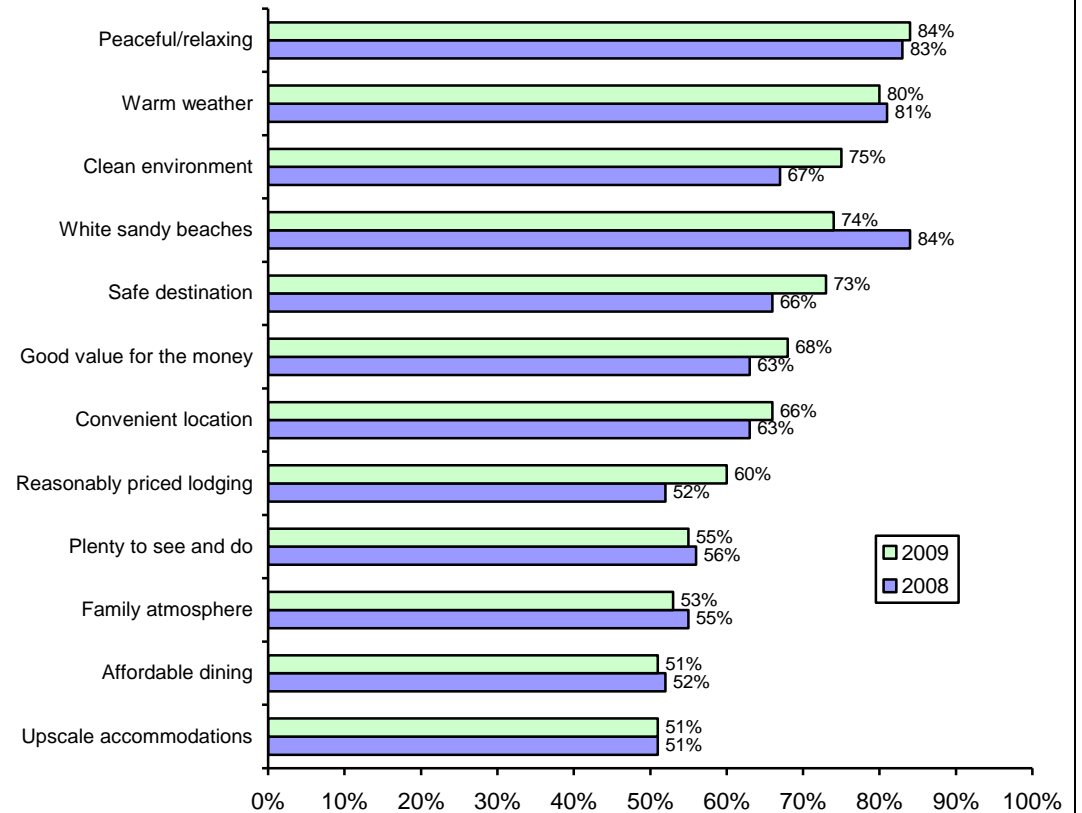
Travel Planning

September Travel Decision Influences*		
	2008	2009
Total Respondents	199	205
Peaceful/Relaxing	83%	84%
Warm weather	81%	80%
Clean environment	67%	75%
White sandy beaches	<84%>	74%
Safe destination	66%	73%
Good value for the money	63%	68%
Convenient location	63%	66%
Reasonably priced lodging	52%	60%
Plenty to see and do	56%	55%
Family atmosphere	55%	53%
Affordable dining	52%	51%
Upscale accommodations	51%	51%

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*



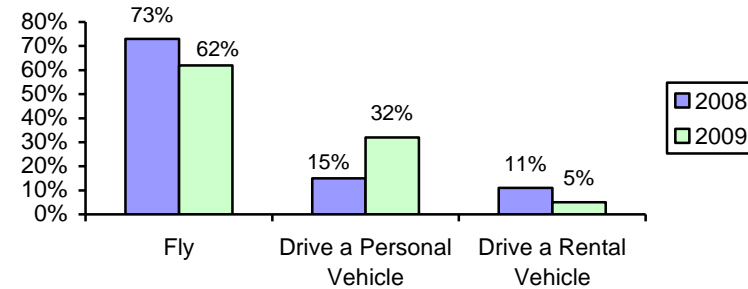


Trip Profile

Mode of Transportation		
	2008	2009
Total Respondents	199	205
Fly	<73%>	62%
Drive a Personal Vehicle	15%	<32%>
Drive a Rental Vehicle	<11%>	5%
Drive an RV	1%	--
Other/No answer	1%	1%

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

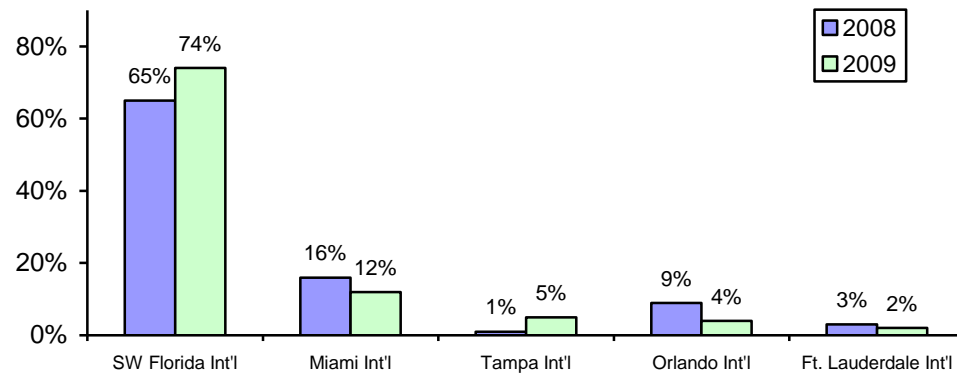
Mode of Transportation



Airport		
	2008	2009
Total Respondents who Arrived by Air	145	127
SW Florida Int'l	65%	74%
Miami Int'l	16%	12%
Tampa Int'l	1%	5%
Orlando Int'l	9%	4%
Ft. Lauderdale Int'l	3%	3%
Sarasota/Bradenton	2%	--
West Palm Beach Int'l	1%	--
Other/No Answer	3%	2%

Q2: At which Florida airport did you land?

Airport

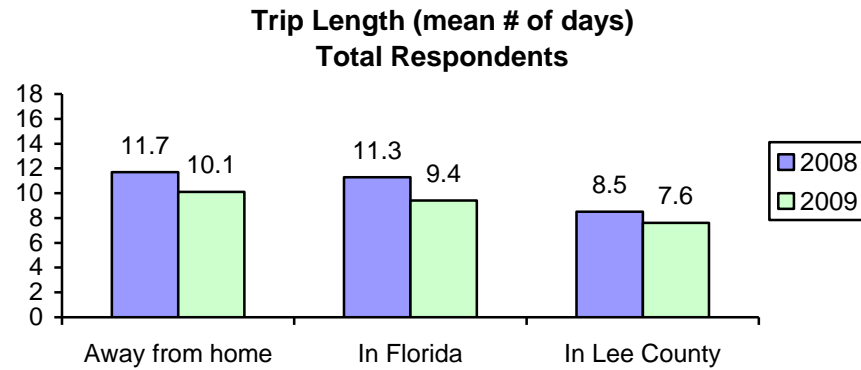




Trip Profile

September Trip Length Mean # of Days			
	Total Respondents		
	2008	2009	% Change
Total Respondents	199	205	
Away from home	<11.7>	10.1	-13.7%
In Florida	<11.3>	9.4	-16.8%
In Lee County	8.5	7.6	-10.6%

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





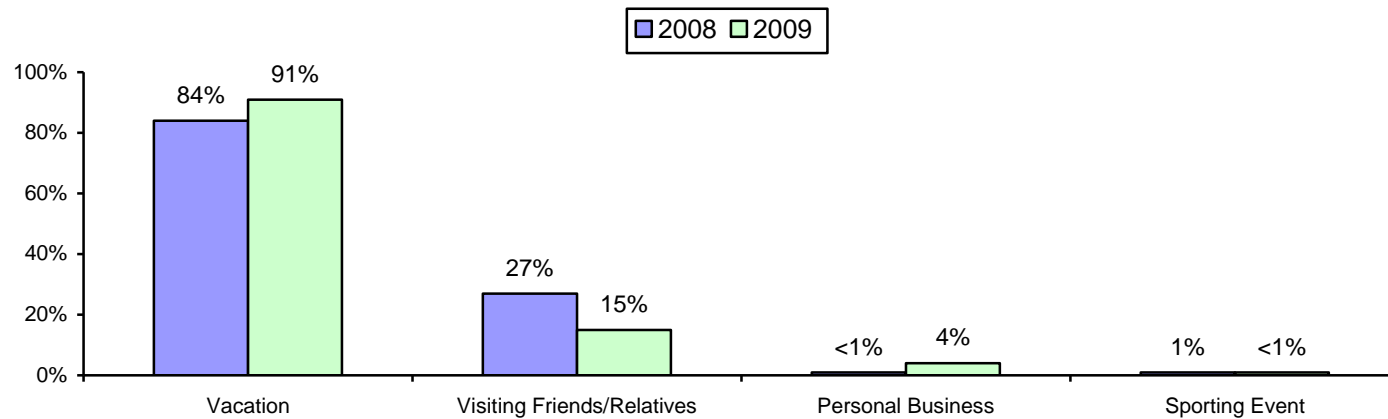
Trip Profile

Reason for September Visit		
	2008	2009
Total Respondents	199	205
Vacation	84%	<91%>
Visiting Friends/Relatives	<27%>	15%
Personal Business	<1%>	<4%>
Sporting Event	1%	<1%>
Convention/Trade Show*	1%	--
Conference/Meeting*	--	1%
Other Business Trip*	1%	1%
Other/No Answer	4%	5%

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 September Visit





Trip Profile

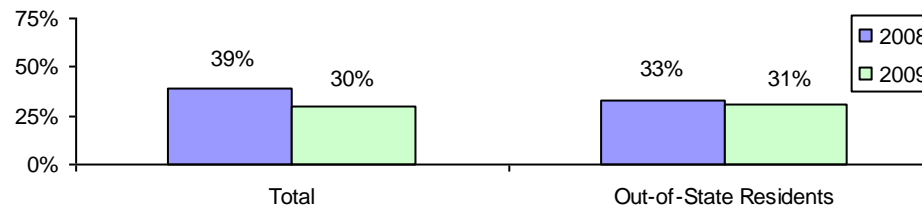
First Time Visitors to Lee County								
	Total		Florida Residents		Out-of-State Residents		International Visitors	
	2008	2009	2008	2009	2008	2009	2008	2009
Total Respondents	199	205	13**	37**	70*	106	89*	51*
Yes	<39%>	30%	N/A	N/A	33%	31%	48%	43%
No	61%	67%	N/A	N/A	68%	68%	51%	55%
No answer	<1%>	4%	N/A	N/A	--	2%	1%	2%

Q20: Is this your first visit to Lee County?

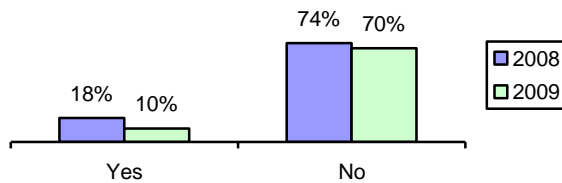
*Note: Small sample size. Please interpret results with caution.

**N/A: Insufficient number of responses for statistical analysis (N<50).

First Time Visitors to Lee County



First Time Visitors to Florida



First Time Visitors to Florida		
	2008	2009
Total Respondents	199	205
Yes	<18%>	10%
No	74%	70%
No Answer	1%	2%
FL Residents*	6%	<18%>

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.



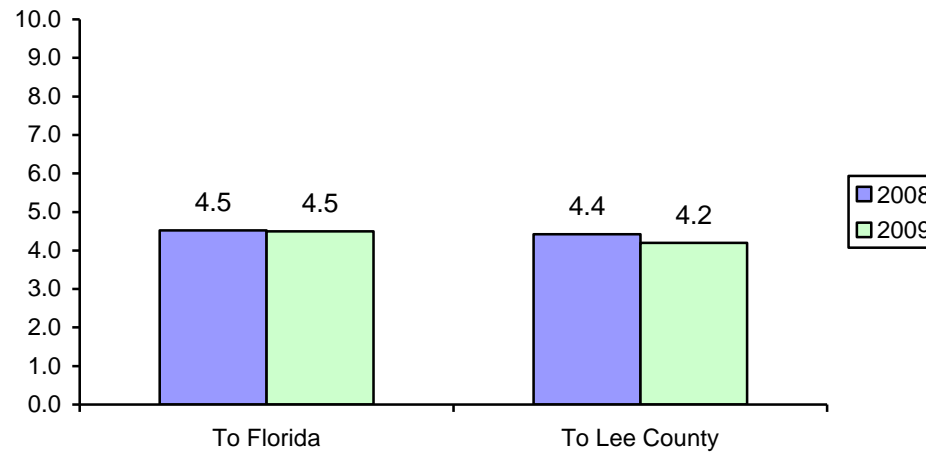
Trip Profile

Previous Visits in Five Years				
	Mean # of Visits To Florida		Mean # of Visits To Lee County	
	2008	2009	2008	2009
Base: Repeat Visitors	148 (FL res. Excl.)	144 (FL res. Excl.)	121	137
Number of visits	4.5	4.5	4.4	4.2

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



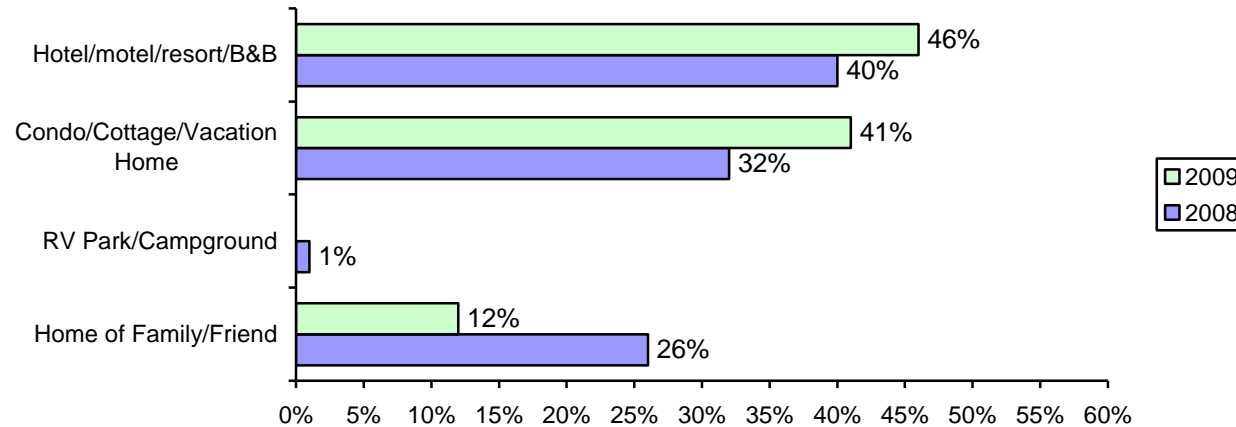


Trip Profile

Type of Accommodations – September Visitors		
	2008	2009
Total Respondents	199	205
Hotel/Motel/Resort/B&B	40%	46%
Hotel/motel/inn	25%	31%
Resort	14%	15%
B&B	1%	--
Condo/Cottage/Vacation Home	32%	41%
Rented home/condo	21%	23%
Borrowed home/condo	5%	4%
Owned home/condo	6%	<14%>
RV Park/Campground	1%	--
Home of family/friend	<26%>	12%
Day trip (no accommodations)	1%	1%

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

Type of Accommodations - September Visitors



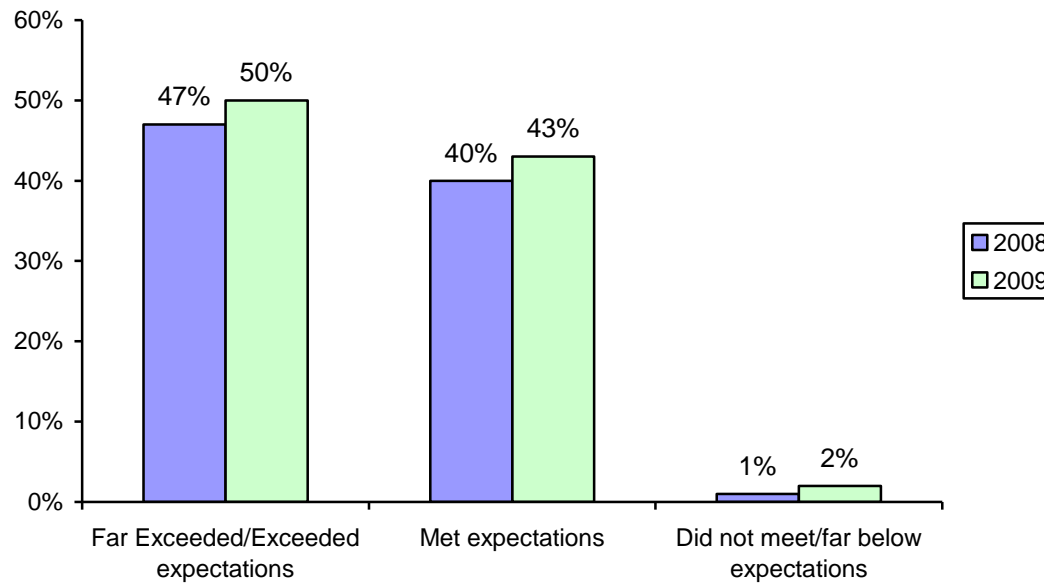


Trip Profile

Quality of Accommodations		
	2008	2009
Total Respondents	199	205
Far exceeded/Exceeded expectations	47%	50%
Met expectations	40%	43%
Did not meet/Far below expectations	1%	2%
No Answer	12%	6%

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

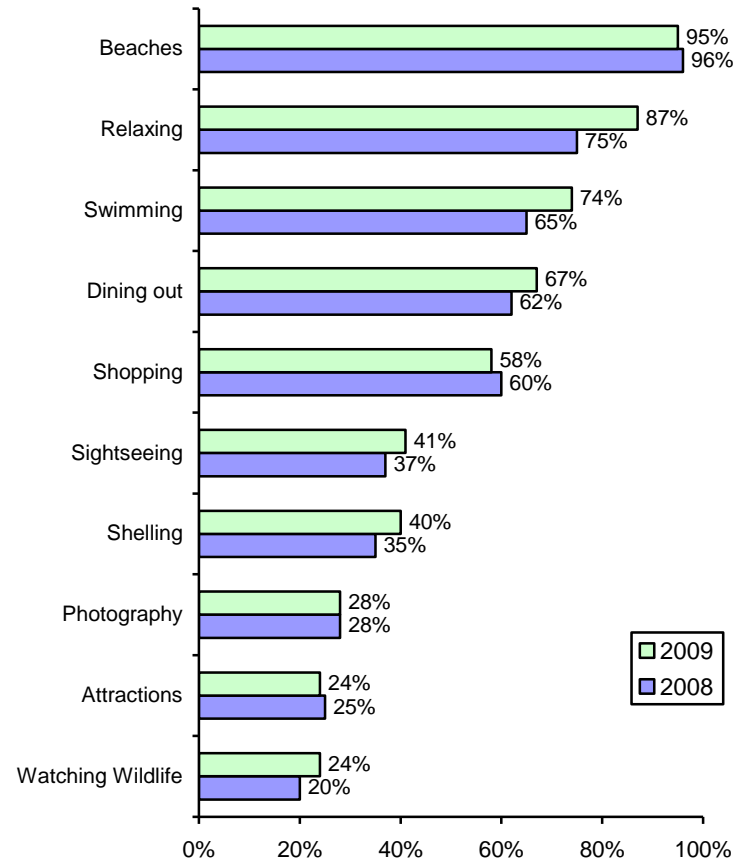
Quality of Accommodations





Trip Activities

September Activities Enjoyed		
	2008	2009
Total Respondents	199	205
Beaches	96%	95%
Relaxing	75%	<87%>
Swimming	65%	74%
Dining out	62%	67%
Shopping	60%	58%
Sightseeing	37%	41%
Shelling	35%	40%
Photography	28%	28%
Attractions	25%	24%
Watching Wildlife	20%	24%
Visiting Friends/Relatives	27%	23%
Bicycle Riding	10%	<19%>
Birdwatching	15%	18%
Fishing	8%	13%
Bars/Nightlife	19%	12%
Exercise/Working Out	7%	12%
Golfing	5%	9%
Miniature Golf	8%	9%
Boating	9%	7%
Kayaking/Canoeing	1%	<7%>
Parasailing/Jet Skiing	8%	7%
Guided Tour	5%	6%
Scuba Diving/Snorkeling	2%	6%
Cultural Events	4%	5%
Tennis	1%	<5%>
Sporting Event	3%	3%
Other	4%	4%



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

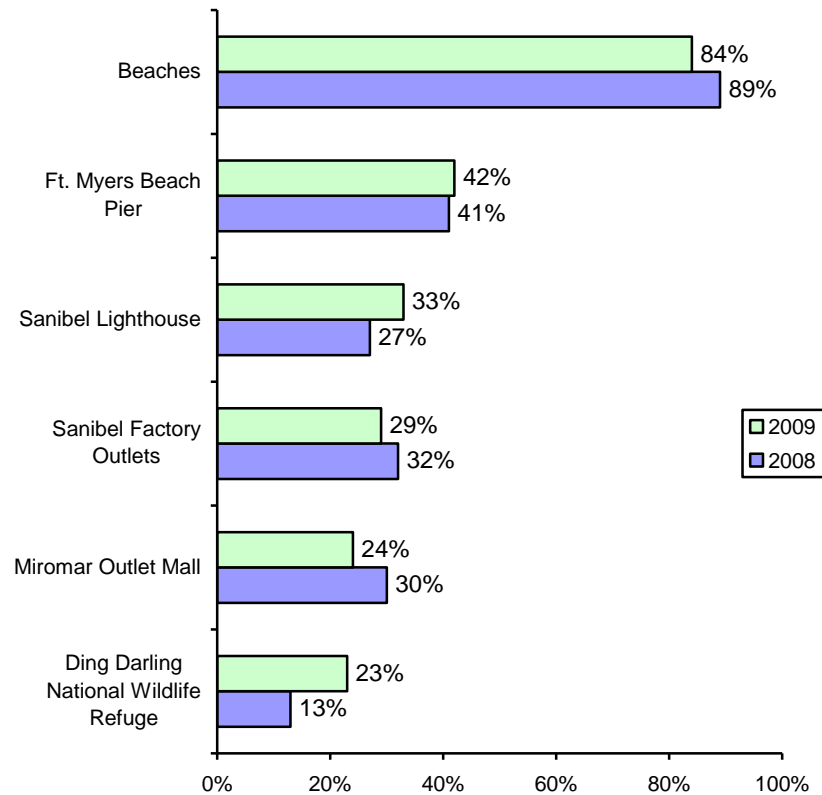
September 2009



Trip Activities

September Attractions Visited		
	2008	2009
Total Respondents	199	205
Beaches	89%	84%
Ft. Myers Beach Pier	41%	42%
Sanibel Lighthouse	27%	33%
Tanger Outlet Center (Sanibel)	32%	29%
Miromar Outlet Mall	30%	24%
Ding Darling National Wildlife Refuge	13%	<23%>
Edison Ford Estates	<33%>	22%
Edison Mall	25%	18%
Periwinkle Place	11%	15%
Bell Tower Shops	15%	14%
Shell Factory and Nature Park	11%	13%
Coconut Point Mall	17%	12%
Gulf Coast Town Center	11%	9%
Bailey-Matthews Shell Museum	3%	7%
Manatee Park	3%	4%
Broadway Palm Dinner Theater	4%	3%
Babcock Wilderness Adventures	1%	1%
Other	3%	6%
None/No Answer	3%	2%

(Please mark ALL that apply.)



Q29: On this trip, which attractions are you visiting?

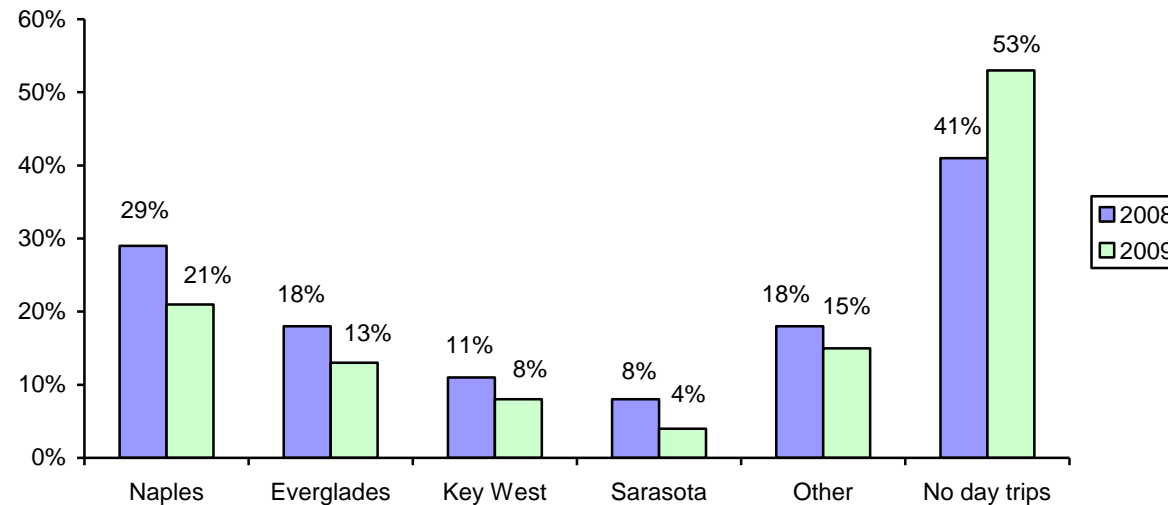


Trip Activities

September Day Trips Outside Lee County		
	2008	2009
Total Respondents	199	205
Any Day Trips (net)	52%	42%
<i>Naples</i>	29%	21%
<i>Everglades</i>	18%	13%
<i>Key West</i>	11%	8%
<i>Sarasota</i>	8%	4%
<i>Other</i>	18%	15%
No day trips	41%	<53%>
No answer	7%	5%

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

September Day Trips Outside Lee County



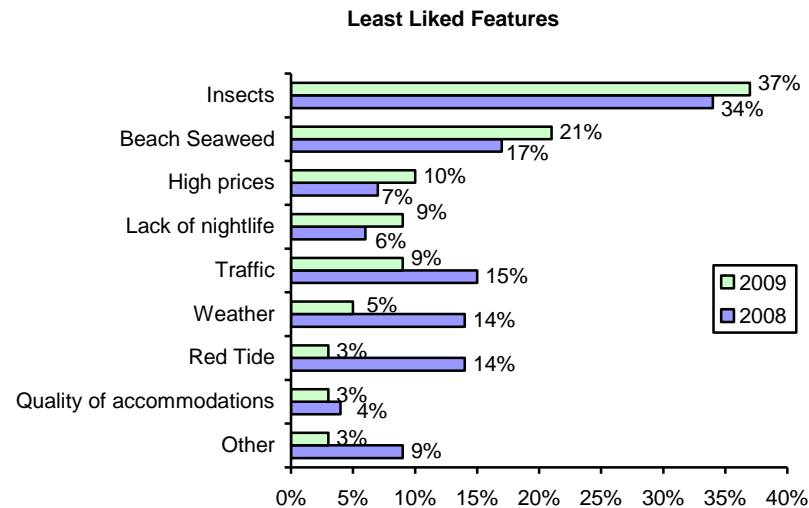


Lee County Experience

Least Liked Features		
	2008	2009
Total Respondents	199	205
Insects	34%	37%
Beach seaweed	17%	21%
High prices	7%	10%
Lack of nightlife	6%	9%
Traffic	15%	9%
Weather	<14%>	5%
Red Tide	<14%>	3%
Quality of accommodations	4%	3%
Other	<9%>	3%
Nothing/no answer	28%	34%

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.



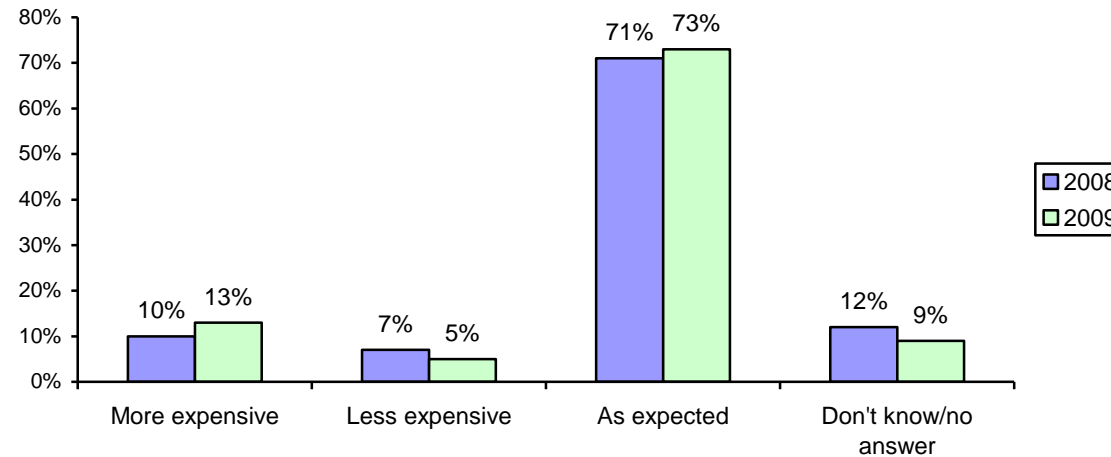


Lee County Experience

Perception of Lee County as Expensive		
	2008	2009
Total Respondents	199	205
More expensive	10%	13%
Less expensive	7%	5%
As expected	71%	73%
Don't know/no answer	12%	9%

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

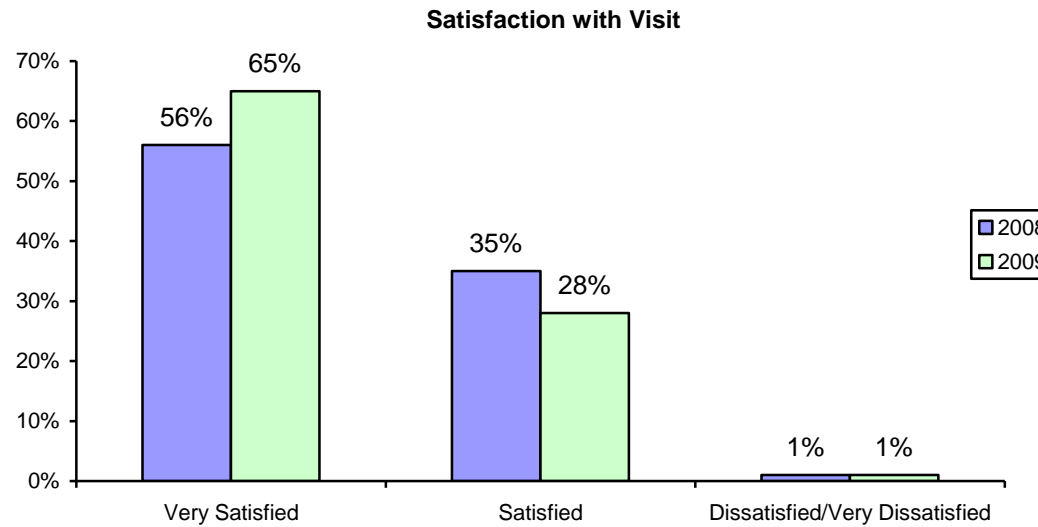




Lee County Experience

Satisfaction with Visit		
	2008	2009
Total Respondents	199	205
<u>Satisfied</u>	91%	93%
<i>Very Satisfied</i>	56%	65%
<i>Satisfied</i>	35%	28%
Neither	2%	2%
Dissatisfied/Very Dissatisfied	1%	<1%
Don't know/no answer	6%	3%

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





Future Plans

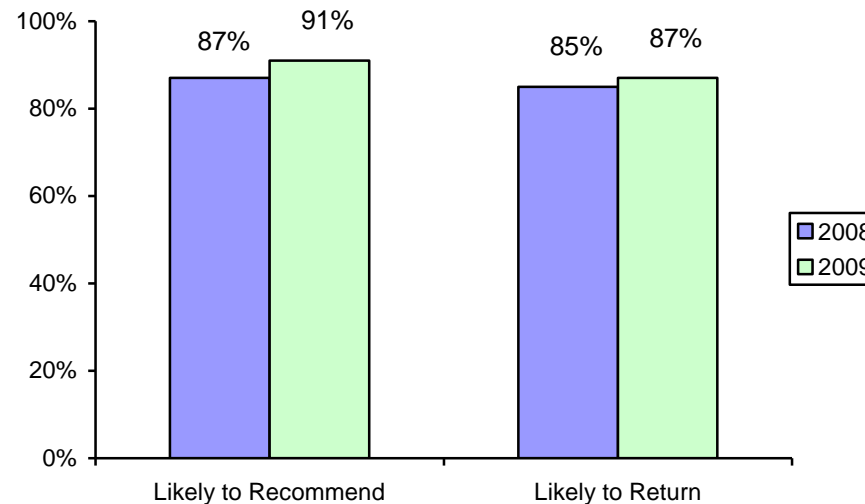
Likelihood to Recommend/Return to Lee County		
	2008	2009
Total Respondents	199	205
Likely to Recommend Lee County	87%	91%
Likely to Return to Lee County	85%	87%
Base: Total Respondents Planning to Return	169	179
Likely to Return Next Year	48%	56%

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")

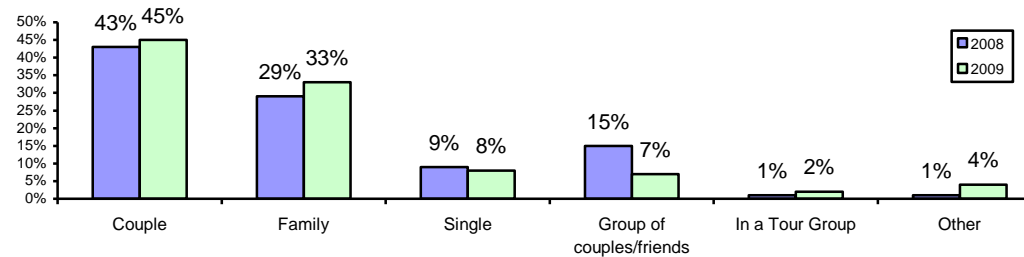




Visitor and Travel Party Demographic Profile

September Travel Party		
	2008	2009
Total Respondents	199	205
Couple	43%	45%
Family	29%	33%
Single	9%	8%
Group of couples/friends	<15%>	7%
In a Tour Group	<1%>	2%
Other	1%	4%
Mean travel party size	3.0	3.0
Mean adults in travel party	2.7	2.5

Travel Party



Travel Parties with Children		
	2008	2009
Total Respondents	199	205
Traveling with any Children (net)	16%	24%
Any younger than 6	10%	10%
Any 6 – 11 years old	6%	<12%>
Any 12 – 17 years old	5%	10%

Q22: On this trip, are you traveling:

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

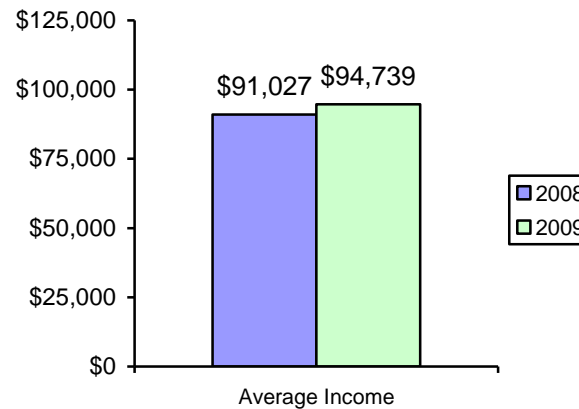
Q24: How many of those people are: Younger than 6 years old/6-11 years old/12-17 years old/Adults



Visitor and Travel Party Demographic Profile

September Visitor Demographic Profile		
	2008	2009
Total Respondents	199	205
Vacations per year (mean)	3.0	3.0
Short getaways per year (mean)	3.3	4.0
Age of respondent (mean)	46.8	48.5
Annual household income (mean)	\$91,027	\$94,739
Marital Status		
Married	64%	<75%>
Single	17%	14%
Other	12%	9%

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 September Visitation					
	%		Visitor Estimates		% Change 2008-2009
	2008	2009	2008	2009	
Paid Accommodations	40%	<58%>	104,967	144,042	37.2%
Friends/Relatives	<60%>	42%	157,472	105,765	-32.8%
<i>Total Visitation</i>			262,439	249,807	-4.8%
September Visitor Origin – Visitors Staying in Paid Accommodations					
	2008	2009	2008	2009	
United States	43%	<71%>	44,855	102,072	127.6%
Germany	<27%>	13%	28,173	18,813	-33.2%
UK	<14%>	5%	14,767	7,440	-49.6%
Switzerland	1%	3%	947	4,031	325.7%
BeNeLux	3%	2%	3,300	3,312	0.4%
France	1%	2%	1,485	2,208	48.7%
Scandinavia	2%	1%	2,225	1,986	-10.8%
Canada	6%	1%	5,914	1,949	-67.1%
Ireland	3%	1%	3,300	1,104	-66.5%
Other	--	1%	--	1,007	
U.S. Region (Paid Accommodations)					
	2008	2009	2008	2009	
Florida	15%	<31%>	6,901	31,329	354.0%
South (including Florida)	33%	45%	14,664	45,478	210.1%
Midwest	37%	34%	16,389	34,361	109.7%
Northeast	15%	15%	6,901	15,159	119.7%
West	2%	4%	863	4,042	368.4%
No Answer	14%	3%	6,038	3,032	-49.8%
2009 Top DMAs (Paid Accommodations)					
West Palm Beach-Fort Pierce			9%	9,285	
Tampa-Saint Petersburg (Sarasota)			8%	8,542	
Indianapolis			7%	7,012	
New York			7%	6,942	
Miami-Fort Lauderdale			6%	5,830	
Orlando-Daytona Beach-Melbourne			4%	4,140	
Chicago			4%	3,910	
Pittsburgh			4%	3,910	
Jacksonville			3%	2,966	
Philadelphia			3%	2,966	



Occupancy Data Analysis September 2009

Property managers representing 150 properties in Lee County were interviewed for the September 2009 Occupancy Survey between September 2 and September 29, 2009, a sample considered accurate to plus or minus 7.7 percentage points at the 95% confidence level.

Property managers representing 140 properties in Lee County were interviewed for the September 2008 Occupancy Survey between October 1 and October 15, 2008, a sample considered accurate to plus or minus 8.3 percentage points at the 95% confidence level.



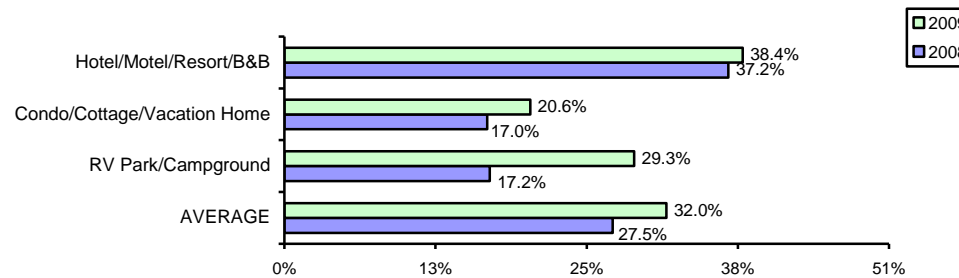
September Occupancy/Daily Rates

	Average Occupancy Rate - %			Average Daily Rate - \$			RevPAR - \$		
	2008	2009	% Change	2008	2009	% Change	2008	2009	% Change
Property Managers Responding	131	138		132	142		131/132	138/142	
Hotel/Motel/Resort/B&B	37.2%	38.4%	3.2%	\$103.02	\$91.17	-11.5%	\$38.28	\$35.00	-8.6%
Condo/Cottage/Vacation Home	17.0%	20.6%	21.2%	\$128.25	\$131.25	2.3%	\$21.74	\$26.97	24.1%
RV Park/Campground	17.2%	29.3%	70.3%	\$29.37	\$39.84	35.7%	\$5.05	\$11.66	130.9%
AVERAGE	27.5%	32.0%	16.4%	\$96.52	\$87.11	-9.8%	\$26.49	\$27.91	5.4%

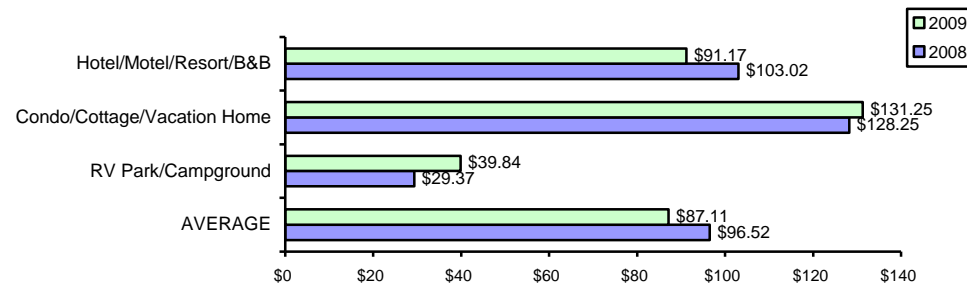
Q16: What was your overall average occupancy rate for the month of September?

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

Average Occupancy Rate



Average Daily Rate

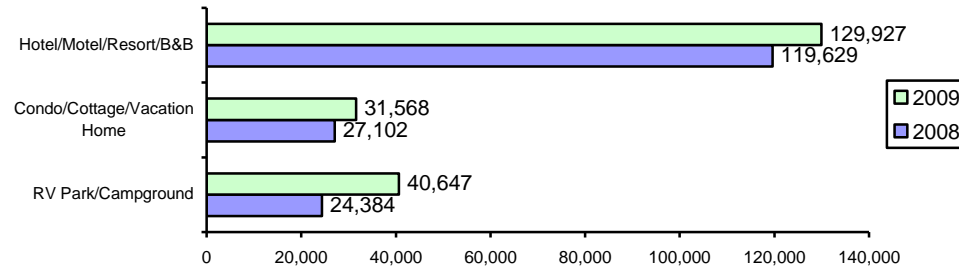




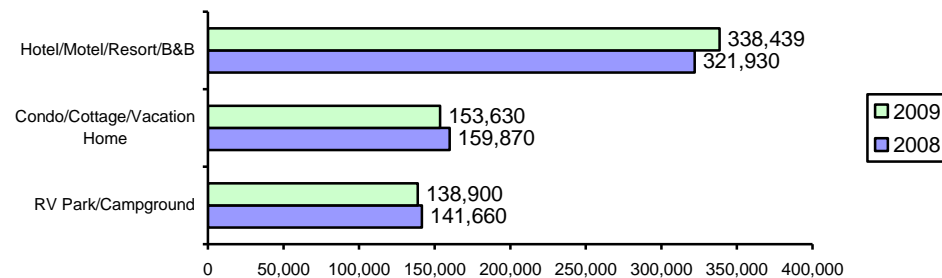
September Room/Unit/Site Nights

	Occupied Room Nights			Available Room Nights		
	2008	2009	% Change	2008	2009	% Change
Hotel/Motel/Resort/B&B	119,629	129,927	8.6%	321,930	338,439	5.1%
Condo/Cottage/Vacation Home	27,102	31,568	16.5%	159,870	153,630	-3.9%
RV Park/Campground	24,384	40,647	66.7%	141,660	138,900	-1.9%
Total	171,115	202,142	18.1%	623,460	630,969	1.2%

Occupied Room Nights



Available Room Nights



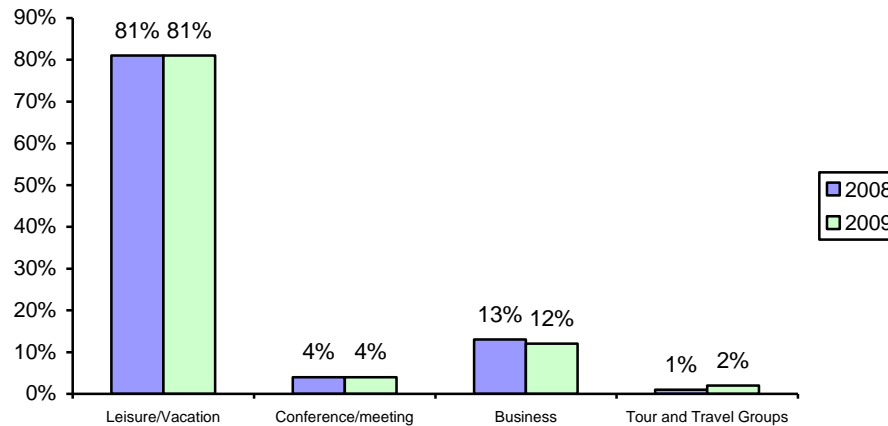


Lodging Management Estimates

September Guest Profile		
	2008	2009
Property Managers Responding	106	127
Purpose of Visit		
Leisure/Vacation	81%	81%
Conference/meeting	4%	4%
Business	13%	12%
Tour and Travel Groups	1%	2%
Property Managers Responding	123	134
Average guests per room	2.2	<2.4>
Property Managers Responding	121	131
Average length of stay in nights	5.7	4.5

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

Purpose of Visit



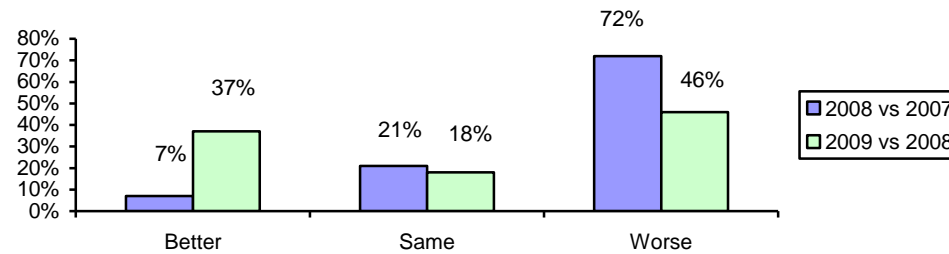


Occupancy Barometer

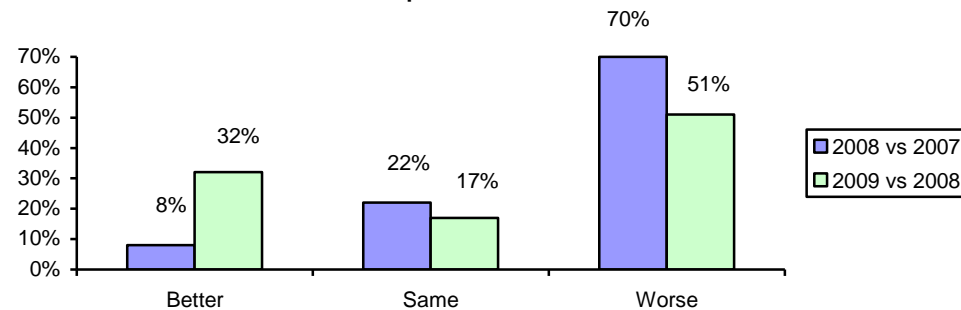
	September Occupancy		September Revenue	
	2008	2009	2008	2009
Property Managers Responding	136	136	135	133
Better than prior year	7%	<37%>	8%	<32%>
Same as prior year	21%	18%	22%	17%
Worse than prior year	<72%>	46%	<70%>	51%

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

September Occupancy



September Revenue



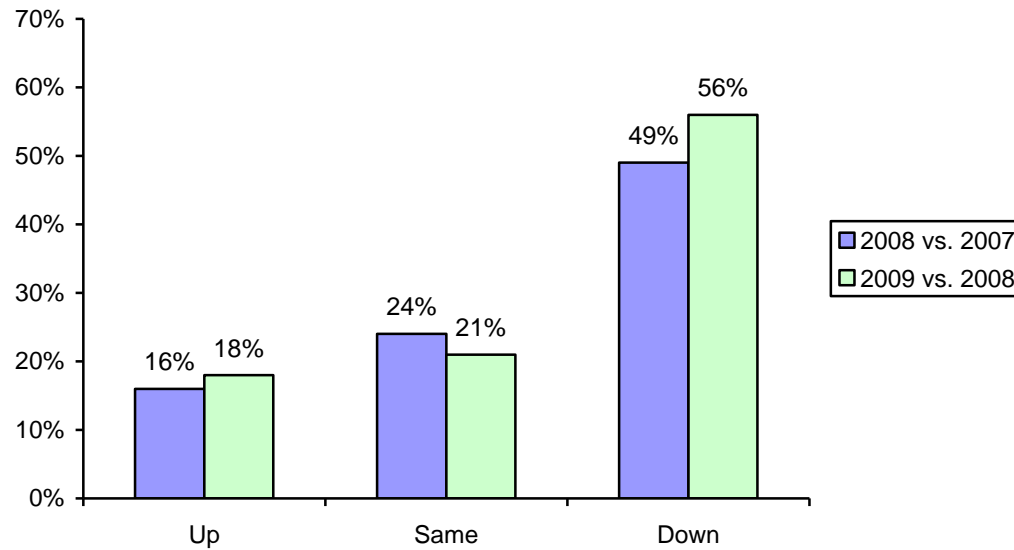


Occupancy Barometer

Level of Reservations for Next 3 Months Compared to Last Year		
	2008	2009
Property Managers Responding	129	140
Up	16%	18%
Same	24%	21%
Down	49%	56%

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

Level of Reservations for Next 3 Months Compared to Last Year



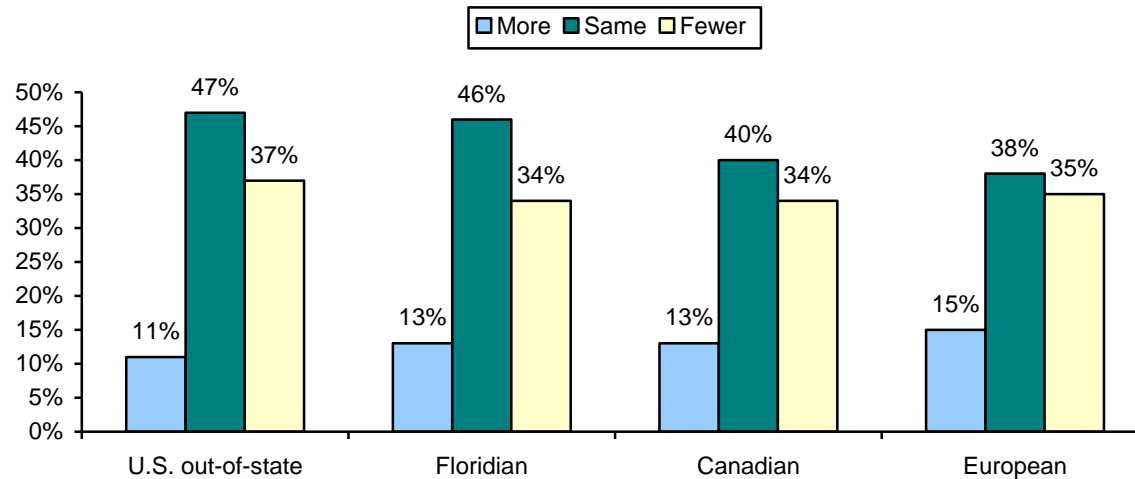


Occupancy Barometer

Origin of Guests for Next 3 Months Compared to Last Year								
Property Managers Responding (121/99 Minimum)	More		Same		Fewer		Not Applicable	
	2008	2009	2008	2009	2008	2009	2008	2009
U.S. out-of-state	13%	11%	34%	<47%>	43%	37%	10%	5%
Floridian	19%	13%	37%	46%	37%	34%	7%	7%
Canadian	11%	13%	37%	40%	40%	34%	13%	12%
European	17%	15%	27%	38%	41%	35%	14%	12%

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



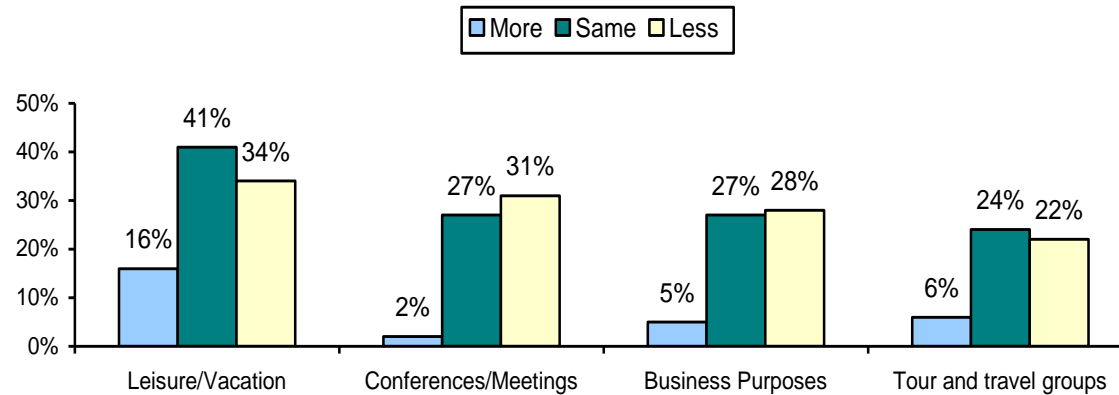


Occupancy Barometer

Type of Travelers for Next 3 Months Compared to Last Year								
Property Managers Responding (78/113 Minimum)	More		Same		Less		Not Applicable	
	2008	2009	2008	2009	2008	2009	2008	2009
Leisure/vacation	19%	16%	33%	41%	40%	34%	8%	9%
Conferences/Meetings	4%	2%	24%	27%	29%	31%	43%	40%
Business Purposes	5%	5%	29%	27%	34%	28%	33%	39%
Tour and travel groups	1%	6%	24%	24%	23%	22%	51%	48%

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

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





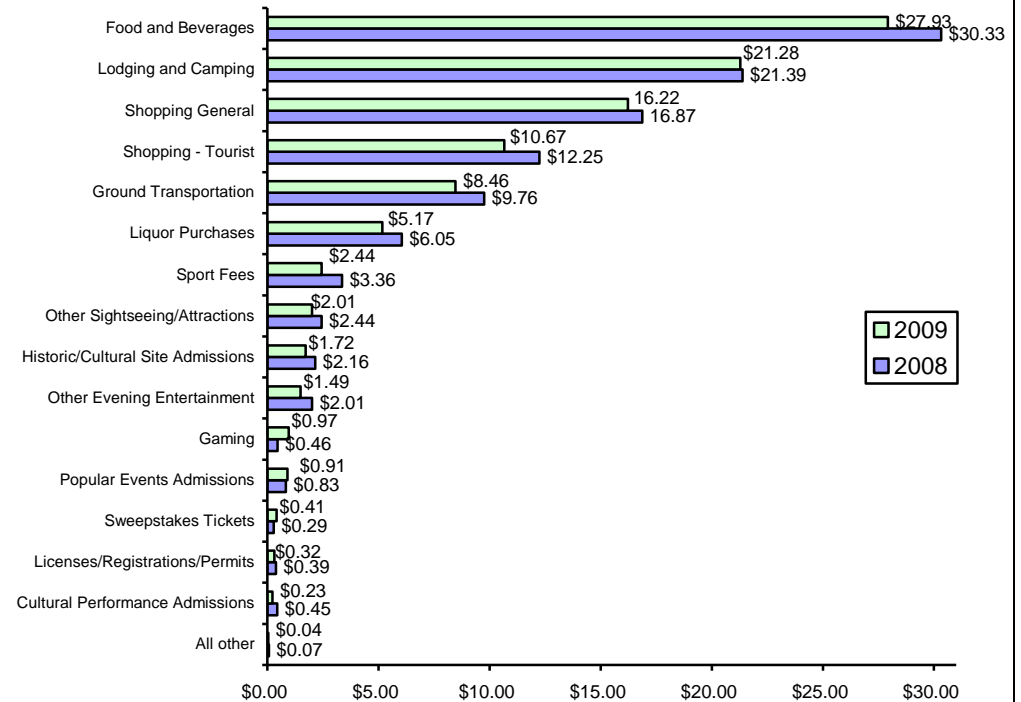
Economic Impact Analysis September 2009



Average Expenditures

September Average Expenditures per Person per Day			
	2008	2009	% Change
TOTAL	\$109.12	\$100.27	-8.1%
Food and Beverages	\$30.33	\$27.93	-7.9%
Lodging Accommodations	\$21.39	\$21.28	-0.5%
Shopping General	\$16.87	\$16.22	-3.9%
Shopping - Tourist	\$12.25	\$10.67	-12.9%
Ground Transportation	\$9.76	\$8.46	-13.3%
Liquor Purchases	\$6.05	\$5.17	-14.5%
Sport Fees	\$3.36	\$2.44	-27.4%
Other Sightseeing/Attractions	\$2.44	\$2.01	-17.6%
Historic/Cultural Site Admissions	\$2.16	\$1.72	-20.4%
Other Evening Entertainment	\$2.01	\$1.49	-25.9%
Gaming	\$0.46	\$0.97	110.9%
Popular Events Admissions	\$0.83	\$0.91	9.6%
Sweepstakes Tickets	\$0.29	\$0.41	41.4%
Licenses/Registrations/Permits	\$0.39	\$0.32	-17.9%
Cultural Performance Admissions	\$0.45	\$0.23	-48.9%
All other	\$0.07	\$0.04	-42.9%

Average Expenditures per Person per Day

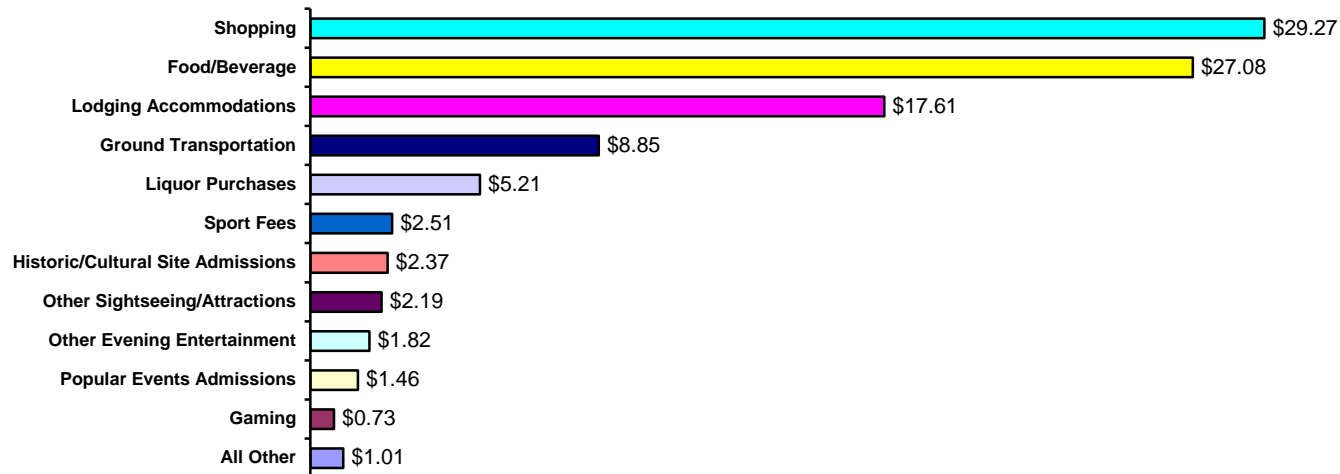




Total Visitor Expenditures by Spending Category

	SEPTEMBER TOTAL EXPENDITURES		
	2008	2009	% Change
TOTAL	\$124,431,421	\$100,102,794	-19.6%
Shopping	\$38,372,124	\$29,274,098	-23.7%
Food and Beverages	\$33,902,105	\$27,082,281	-20.1%
Lodging Accommodations	\$16,516,559	\$17,608,327	6.6%
Ground Transportation	\$12,836,954	\$8,846,635	-31.1%
Liquor Purchases	\$6,899,371	\$5,206,683	-24.5%
Sport Fees	\$2,420,916	\$2,514,135	3.9%
Historic/Cultural Site Admissions	\$3,747,460	\$2,372,536	-36.7%
Other Sightseeing/Attractions	\$2,864,204	\$2,186,707	-23.7%
Other Evening Entertainment	\$3,254,757	\$1,815,378	-44.2%
Popular Events Admissions	\$1,530,613	\$1,464,553	-4.3%
Gaming	\$863,688	\$725,865	-16.0%
All Other	\$1,222,670	\$1,005,596	-17.7%

September 2009 Total Expenditures
(Millions)





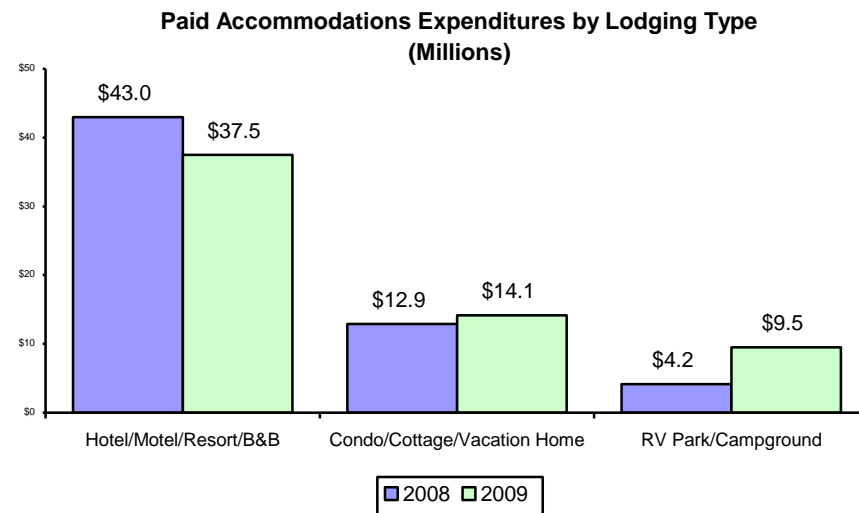
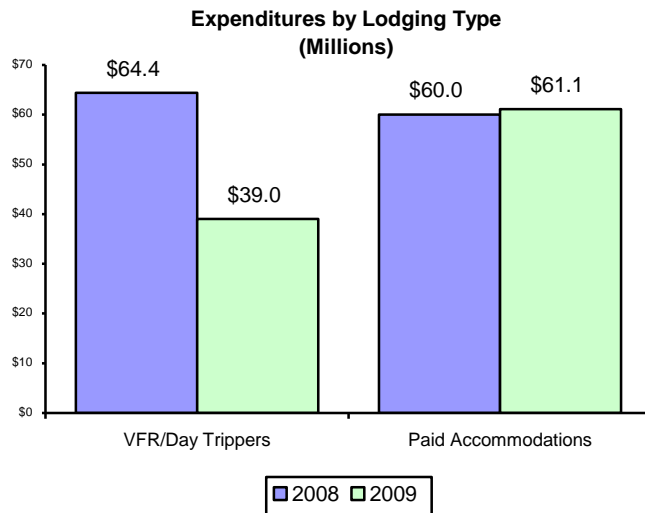
Total Visitor Expenditures by Spending Category

	ALL PROPERTIES					
	Staying in Paid Accommodations			Visiting Friends and Relatives/ Day Trippers		
	2008	2009	% Change	2008	2009	% Change
TOTAL	\$60,026,032	\$61,103,839	1.8%	\$64,405,389	\$38,998,955	-39.4%
Lodging Accommodations	\$16,516,559	\$17,608,327	6.6%	\$0	\$0	--
Shopping	\$16,016,356	\$15,883,623	-0.8%	\$22,355,768	\$13,390,475	-40.1%
Food and Beverages	\$13,692,058	\$14,737,030	7.6%	\$20,210,047	\$12,345,251	-38.9%
Ground Transportation	\$4,444,055	\$4,433,034	-0.2%	\$8,392,899	\$4,413,601	-47.4%
Liquor Purchases	\$2,650,219	\$2,537,326	-4.3%	\$4,249,152	\$2,669,357	-37.2%
Sport Fees	\$1,812,678	\$1,532,175	-15.5%	\$608,238	\$981,960	61.4%
Historic/Cultural Site Admissions	\$987,206	\$1,112,047	12.6%	\$2,760,254	\$1,260,489	-54.3%
Other Sightseeing/Attractions	\$1,543,834	\$1,096,551	-29.0%	\$1,320,370	\$1,090,156	-17.4%
Other Evening Entertainment	\$974,642	\$734,526	-24.6%	\$2,280,115	\$1,080,852	-52.6%
Popular Events Admissions	\$547,335	\$514,614	-6.0%	\$983,278	\$949,939	-3.4%
Gaming	\$326,819	\$402,883	23.3%	\$536,869	\$322,982	-39.8%
All Other	\$514,271	\$511,703	-0.5%	\$708,399	\$493,893	-30.3%



Total Visitor Expenditures by Lodging Type

September Total Expenditures by Lodging Type					
	2008	2009	% Change	2008	2009
TOTAL	\$124,431,421	\$100,102,794	-19.6%	100%	100%
Visiting Friends & Relatives/Day Trippers	\$64,405,389	\$38,998,955	-39.4%	52%	39%
Paid Accommodations	\$60,026,032	\$61,103,839	1.8%	48%	61%
<i>Hotel/Motel/Resort/B&B</i>	\$42,988,325	\$37,485,932	-12.8%	35%	37%
<i>Condo/Cottage/Vacation Home</i>	\$12,886,521	\$14,130,536	9.7%	10%	14%
<i>RV Park/Campground</i>	\$4,151,186	\$9,487,371	128.5%	3%	9%





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.



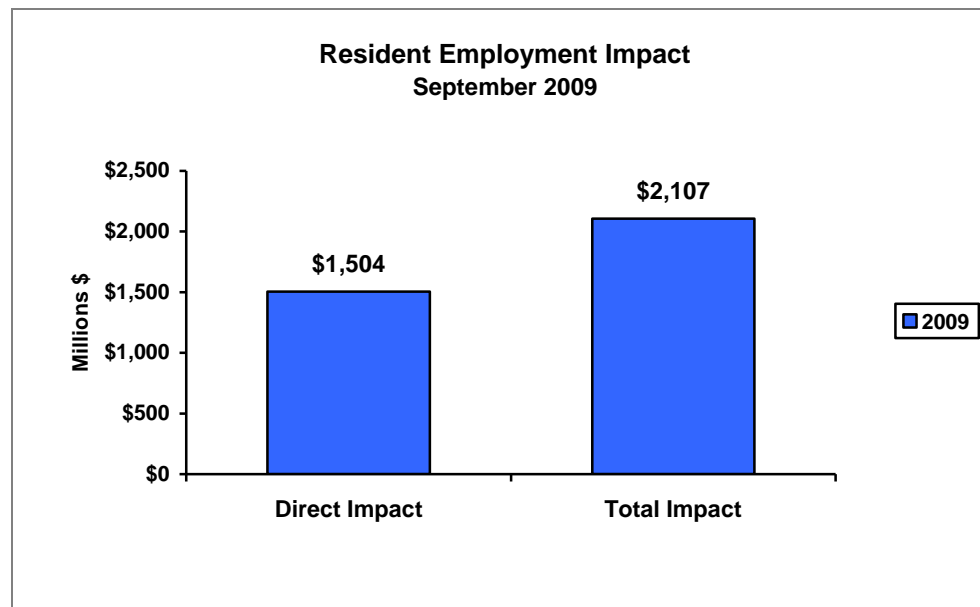
Impact on Jobs for Lee County Residents

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.).





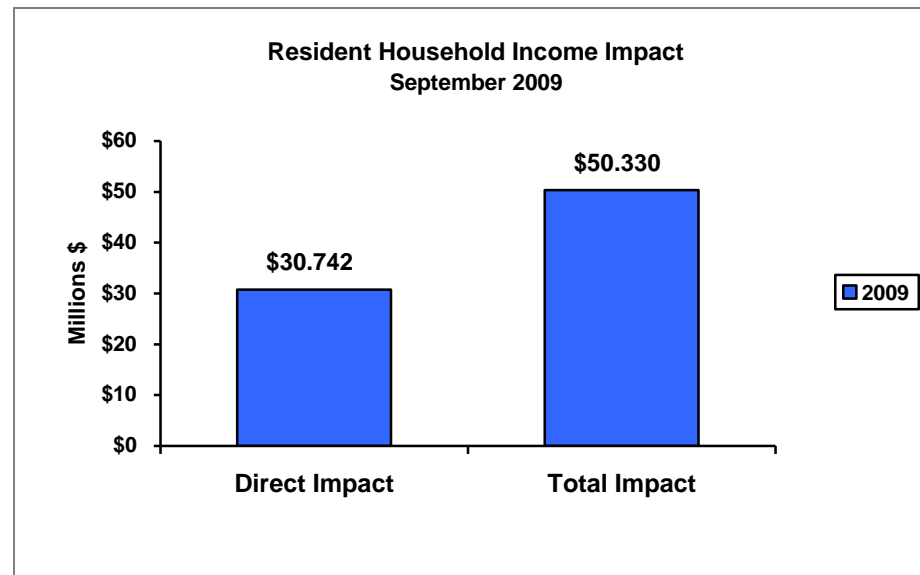
Impact on Household Income for Lee County Residents

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.

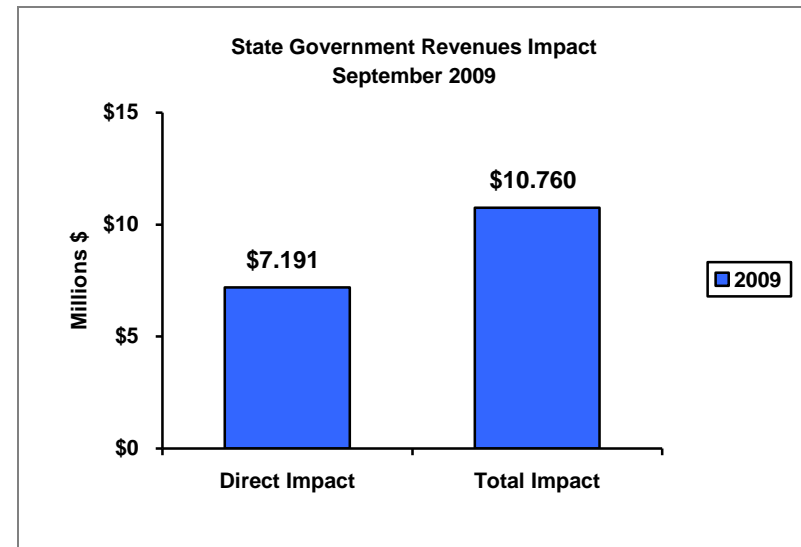
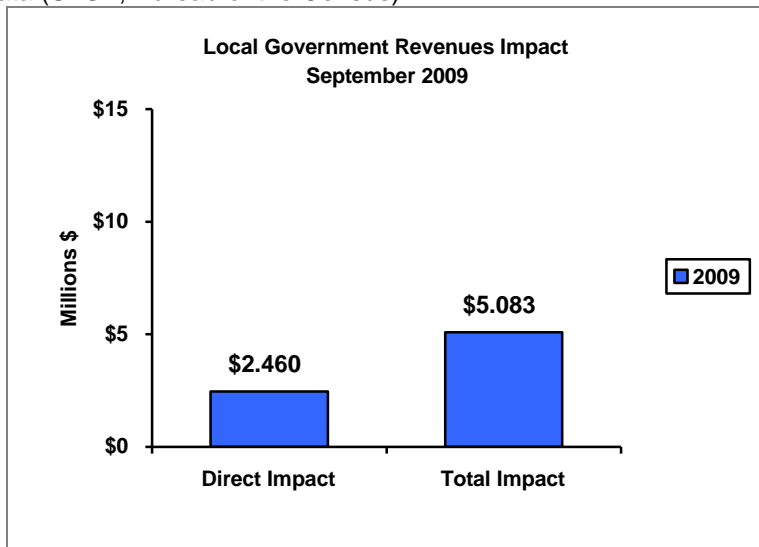
The gross government revenues accruing to governments as a result of producing the output purchased with visitor expenditures is the government revenue impact.

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 September 2009



September 2009 Interviewing Statistics

Visitor Profile Interviewing Statistics			
City	Event/Location	Interviewing Dates	Number of Interviews*
Sanibel	Holiday Inn	2-Sep	14
Sanibel	Loggerhead Cay	2-Sep	10
Sanibel	Song of the Sea	2-Sep	6
Fort Myers Beach	The Pier	5-Sep	22
Fort Myers Beach	Diamond Head Resort	10-Sep	6
Fort Myers Beach	Estero Beach Club	10-Sep	8
Sanibel	Sanibel Arms	14-Sep	5
Sanibel	Sanibel Inn	14-Sep	14
Sanibel	Tortuga Beach Club	14-Sep	8
Bonita Springs	Bonita Beach	19-Sep	23
Fort Myers	Clarion	19-Sep	8
Fort Myers	Shell Factory	20-Sep	11
Fort Myers	Edison Home	24-Sep	27
Fort Myers	Best Western	26-Sep	11
Cape Coral	Cape Coral Yacht Club Beach	26-Sep	11
Fort Myers Beach	Neptune Inn	29-Sep	6
Fort Myers Beach	Times Square	29-Sep	15
TOTAL			205

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



Occupancy Interviewing Statistics

Interviews were conducted from September 2 – September 29, 2009. Information was provided by 155 Lee County lodging properties.

September 2009

Lodging Type	Number of Interviews
Hotel/Motel/Resort/B&B	94
Condo/Cottage/Vacation Home/Timeshare	39
RV Park/Campground	17
Total	150