



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

**November 2009 Visitor Profile and Occupancy Analysis
January 8, 2010**

Prepared for:

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

Prepared by:



providing direction in travel & tourism



Executive Summary November 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 November 2009, and just over 200,000 staying with friends or relatives while visiting the County, for a total of 368,473 visitors.
- Year-over-year visitation among those staying in paid accommodations was about the same in November 2009 as it was in November 2008 (-0.6%) and increased among those staying with friends or relatives (+33.3%), resulting in an overall increase of 16% in total visitation.
- Three-quarters of November 2009 visitors staying in paid accommodations were U.S. residents (75%), an increase from last November (67%). UK, Germany, and Canada contributed the largest share of international visitors staying in paid accommodations (9%, 7%, and 6% respectively) during November 2009 – similar to November 2008. However, visitation from Germany and Canada was down year-over-year for the month of November.
- Domestic visitors staying in paid accommodations during November 2009 were most likely to have come from the Midwest (42%) with the South (28%) and Northeast (24%) contributing about equal shares. As is typical, only a minority came from the West (3%).

Visitor Expenditures

- The average per person per day expenditure was \$109.63 in November 2009 – a 9.6% decline from November 2008 (\$121.33), a similar level year-over-year decline reported in each of the prior three months. However, the November 2009 average expenditure was higher than observed in the three months prior (\$102.13, \$100.27, and \$103.13 during August, September, and October of 2009, respectively), suggesting the possible start of a more positive trend.
- Total visitor expenditures for November 2009 are estimated at \$155 million, a 25.6% drop from \$209 million in November 2008. Expenditures among those staying in paid accommodations decreased 29.2% from November 2008 to November 2009 and decreased 18.9% among those staying with friends and relatives. For the calendar year-to-date (January through November), total visitor expenditures have only dropped 8.2% compared with the same period the prior year – a more encouraging view of Lee County's position during the down economy.



Total November Visitation					
	%		Visitor Estimates		% Change 2008-2009
	2008	2009	2008	2009	
Paid Accommodations	51%	44%	162,579	161,644	-0.6%
Friends/Relatives	49%	56%	155,122	206,829	33.3%
<i>Total Visitation</i>			317,701	368,473	16.0%
November Visitor Origin – Visitors Staying in Paid Accommodations					
	2008	2009	2008	2009	
United States	67%	75%	108,386	120,705	11.4%
UK	8%	9%	12,193	14,663	20.3%
Germany	12%	7%	18,968	11,767	-38.0%
Canada	7%	6%	10,839	9,615	-11.3%
BeNeLux	1%	1%	1,355	2,297	69.5%
Austria	--	1%	--	1,298	--
Switzerland	--	1%	--	1,298	--
Scandinavia	4%	--	6,774	--	--
Ireland	3%	--	4,064	--	--
Other	1%	--	1,355	--	--
U.S. Region (Paid Accommodations)					
	2008	2009	2008	2009	
Florida	9%	10%	9,484	12,158	28.2%
South (including Florida)	24%	28%	25,742	33,750	31.1%
Midwest	31%	42%	33,871	51,191	51.1%
Northeast	19%	24%	20,322	28,810	41.8%
West	5%	3%	5,419	3,595	-33.7%
No Answer	23%	3%	24,387	3,359	-86.2%

2009 Top DMAs (Paid Accommodations)		
Detroit	8%	9,053
Boston (Manchester, NH)	6%	7,772
Indianapolis	6%	6,837
New York	6%	6,583
Chicago	5%	5,875
Miami-Fort Lauderdale	5%	5,648
Saint Louis	4%	4,476
Atlanta	3%	3,477
Cleveland-Akron (Canton)	3%	3,477
Tampa-Saint Petersburg (Sarasota)	3%	3,405
Minneapolis-Saint Paul	3%	3,359



Trip Planning

- The majority of November 2009 visitors said they had visited web sites while planning their trip (80%). November 2009 visitors most often mentioned they went to airline web sites (37%), search engines (32%), booking sites (28%), and hotel websites (27%). The proportion claiming to have visited booking sites for trip planning was higher among November 2009 visitors than among November 2008 visitors (28% vs. 17%).
- When deciding to visit Lee County, November 2009 visitors were more likely than November 2008 visitors to say the following attributes influenced their selection:
 - Warm weather
 - White sandy beaches
 - Safe destination
 - Clean environment
 - Good value for the money
 - Reasonably priced lodging
 - Affordable dining
 - Upscale accommodations

Note that the three expenditure items in the list – *good value*, *reasonably priced lodging*, and *affordable dining* – were all selected more often in 2009, signifying the increased importance of “value” in the decision to visit Lee County.

Visitor Profile

- The proportion of visitors who said they were staying in a hotel/motel/resort/B&B was higher in November 2009 than the same month the prior year (44% vs. 33% November 2008). A sizable minority said they stayed in a condo/vacation home (41%) and one in ten at the home of a friend or family member (13%). Slightly fewer than half felt that the quality of accommodations *far exceeded* or *exceeded their expectations* (42%) in November 2009.
- The top activities enjoyed while in Lee County during November 2009 were *beaches*, *relaxing*, *dining out*, *shopping*, and *swimming*. November 2009 visitors were more likely to go *shelling* than those in November 2008 (42% vs. 30%).
- Taking day trips to other areas was down when compared to November 2008 (49% vs. 35%); primarily in trips to Naples (31% vs. 20%).



- Overall, visitor satisfaction remains extremely high, with 95% of November 2009 visitors reporting being *very satisfied* (62%) or *satisfied* (33%) with their visit. The vast majority indicated they were likely to return to Lee County (95%), and two-thirds of them are likely to return next year (68%).
- The least liked features about the Lee County area among November 2009 visitors were *insects* (20%) and *traffic* (18%). Visitors' concerns about *traffic* (18%), *weather* (4%), and *lack of nightlife* (2%) were less prevalent during November 2009 than during the prior year (30%, 11%, and 10% respectively).
- The demographic composition of November 2009 visitors was generally similar to that of November 2008 visitors. November 2009 visitors averaged 53 years of age with an average household income of approximately \$102,000. The majority of visitors were married (76%) and only a minority were traveling *with* children (18%). The average travel party size was 2.8 people.



Lodging Property Manager Assessments

- For the Lee County lodging industry in total, the number of *available* room nights was slightly higher in November 2009 than in the November prior, but *occupied* room nights decreased slightly (-3.6%). Hotel/motel/resort *available* room nights were up 18.4% from a year ago and occupied room nights were up substantially as well (+12.2%). Properties in the condo/vacation home and RV park/campground categories both saw a decline in *available* and *occupied* room nights.

	Occupied Room Nights			Available Room Nights		
	2008	2009	% Change	2008	2009	% Change
Hotel/Motel/Resort/B&B	146,045	163,907	12.2%	303,270	358,923	18.4%
Condo/Cottage/Vacation Home	78,634	56,810	-27.8%	167,040	151,122	-9.5%
RV Park/Campground	84,708	77,654	-8.3%	166,830	139,560	-16.3%
Total	309,387	298,371	-3.6%	637,140	649,605	2.0%

- Average occupancy rates decreased 5.6% from 48.6% in November 2008 to an average of 45.9% in November 2009. Hotels/motels/resorts suffered a decline in occupancy rates (-5.2%) likely due in large part to the increase in inventory. Occupancy rates for condos/cottages decreased as well (-20.2%) but increased for RV parks/campgrounds (9.4%).
- Overall average daily rates dropped from \$104.12 to \$94.16 year-over-year (-9.6%). ADR decreases were reported for all lodging categories but were greatest for hotels/motels/resorts (-12.8%).
- RevPAR was down 14.5% from November 2008 driven by decreases for hotels/motels/resorts (-17.3%) and condos/vacation homes (-22.5%).

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2008	2009	% Change	2008	2009	% Change	2008	2009	% Change
Property Managers Responding	135	144		135	146		135/135	144/146	
Hotel/Motel/Resort/B&B	48.2%	45.7%	-5.2%	\$123.29	\$107.50	-12.8%	\$59.37	\$49.09	-17.3%
Condo/Cottage/Vacation Home	47.1%	37.6%	-20.2%	\$137.15	\$133.17	-2.9%	\$64.56	\$50.06	-22.5%
RV Park/Campground	50.8%	55.6%	9.4%	\$40.40	\$37.48	-7.2%	\$20.52	\$20.86	1.7%
AVERAGE	48.6%	45.9%	-5.6%	\$104.12	\$94.16	-9.6%	\$50.56	\$43.25	-14.5%



- Property managers in November 2009 were no more negative than they had been in November 2008 when comparing their current month's *occupancy* and *revenue* year-over-year. Fully half reported their November 2009 *occupancy* was the same or better than the prior year (51% vs. 46% November 2008). Similarly, about half reported their *revenue* was the same or better than the prior year (47% vs. 43% November 2008).
- Projections for the next three months (December – February) 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 November 2008 – while half (51%) reported that their reservations are down.



November 2009 Lee County Snapshot

Total November Visitation				
	%		Visitor Estimates	
	2008	2009	2008	2009
Paid Accommodations	51%	44%	162,579	161,644
Friends/Relatives	49%	56%	155,122	206,829
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BeNeLux	1%	1%	1,355	2,297
Austria	--	1%	--	1,298
Switzerland	--	1%	--	1,298
Scandinavia	4%	--	6,774	--
Ireland	3%	--	4,064	--
Other	1%	--	1,355	--

Total Visitor Expenditures			
	2008	2009	% Change
Total Visitor Expenditures	\$209,030,611	\$155,446,477	-25.6%
Paid Accommodations	\$136,774,754	\$96,854,719	-29.2%

Average Per Person Per Day Expenditures		
2008	2009	% Change
\$121.33	\$109.63	-9.6%

First-Time/Repeat Visitors to Lee County		
	2008	2009
First-time	24%	21%
Repeat	74%	79%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2008	2009	% Change	2008	2009	% Change	2008	2009	% Change
Property Managers Responding	135	144		135	146		135/135	144/146	
Hotel/Motel/Resort/B&B	48.2%	45.7%	-5.2%	\$123.29	\$107.50	-12.8%	\$59.37	\$49.09	-17.3%
Condo/Cottage/Vacation Home	47.1%	37.6%	-20.2%	\$137.15	\$133.17	-2.9%	\$64.56	\$50.06	-22.5%
RV Park/Campground	50.8%	55.6%	9.4%	\$40.40	\$37.48	-7.2%	\$20.52	\$20.86	1.7%
AVERAGE	48.6%	45.9%	-5.6%	\$104.12	\$94.16	-9.6%	\$50.56	\$43.25	-14.5%



Visitor Profile Analysis November 2009

A total of 207 interviews were conducted with visitors in Lee County during the month of November 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 204 interviews were conducted with visitors in Lee County during the month of November 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

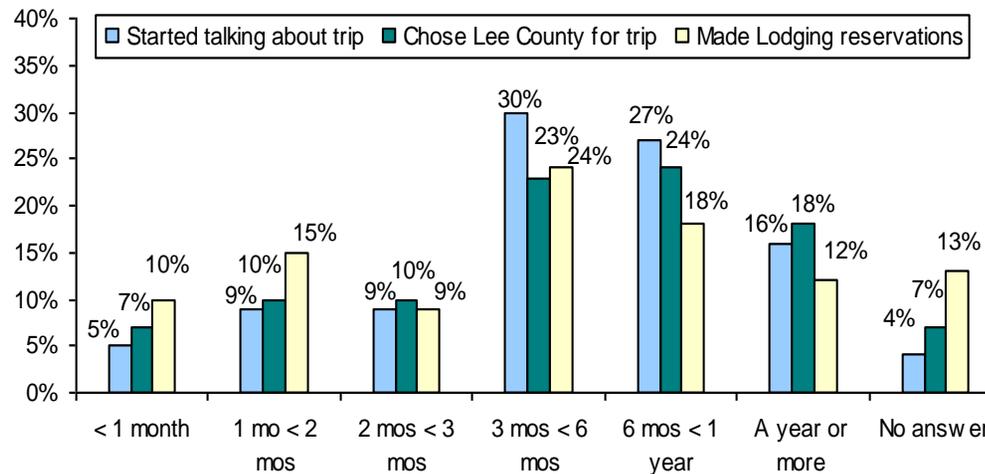
	Started Talking About Trip		Chose Lee County for Trip		Made Lodging Reservations	
	2008	2009	2008	2009	2008	2009
Total Respondents	204	207	204	207	204	207
< 1 month	7%	5%	11%	7%	9%	10%
1 mo - < 2 mos	12%	9%	12%	10%	10%	15%
2 mos - < 3 mos	12%	9%	11%	10%	11%	9%
3 mos - < 6 mos	26%	30%	21%	23%	23%	24%
6 mos - < 1 year	25%	27%	23%	24%	19%	18%
A year or more	16%	16%	16%	18%	8%	12%
No answer	2%	4%	6%	7%	20%	13%

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?

November 2009 Travel Planning





Travel Planning

Reserved Accommodations		
	November	
	2008	2009
Total Respondents	204	207
Before leaving home	76%	<86%>
After arriving in FL	6%	4%
On the road, but not in FL	<1%>	1%
No answer	<17%>	9%

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

Computer Access		
	November	
	2008	2009
Total Respondents	204	207
<u>Yes</u>	89%	93%
<i>Home</i>	23%	<33%>
<i>Work</i>	3%	3%
<i>Both Home and Work</i>	63%	57%
<u>No</u>	10%	7%

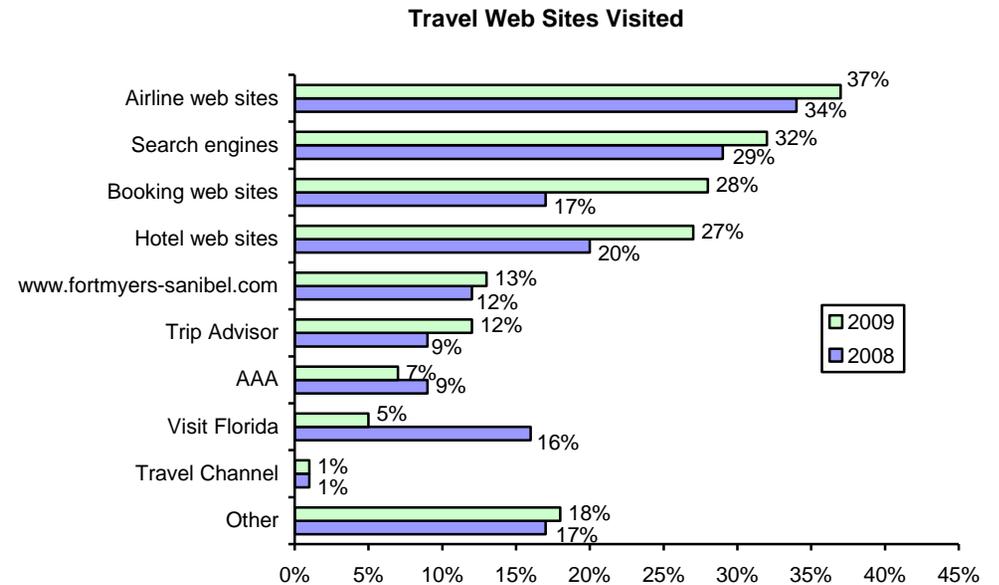
Q8: Do you have access to a computer?



Travel Planning

Travel Web Sites Visited by November Travelers		
	2008	2009
Total Respondents with computer access	181	192
Visited web sites (net)	82%	80%
Airline web sites	34%	37%
Search engines	29%	32%
Booking web sites	17%	<28%>
Hotel web sites	20%	27%
www.fortmyers-sanibel.com	12%	13%
Trip Advisor	9%	12%
AAA	9%	7%
Visit Florida	<16%>	5%
Travel Channel	1%	1%
Other	17%	18%
Did not visit web sites	17%	16%
No Answer	1%	4%

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



Base: Respondents with Computer Access

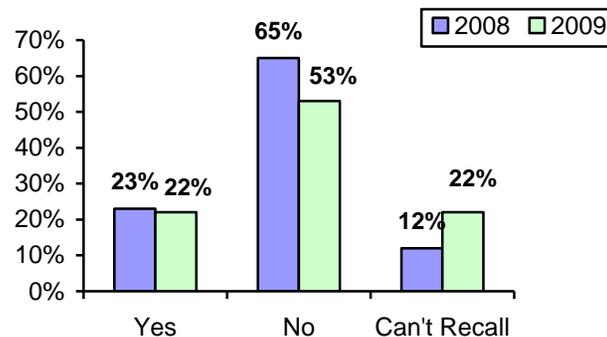


Travel Planning

November Travelers Requesting Information		
	2008	2009
Total Respondents	204	207
Requested Information (net)	23%	32%
Hotel Web Site	6%	<17%>
Call hotel	2%	<9%>
VCB Web Site	6%	4%
Visitor Guide	5%	4%
Call local Chamber of Commerce	1%	1%
Call VCB	1%	1%
Clipping/mailling coupon	1%	1%
E-Newsletter	--	<1%>
Magazine Reader Service Card	<1%>	--
Other	10%	9%
Did not request information	60%	56%
No Answer	17%	12%

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	204	207
Yes	<9%>	4%
No	89%	<96%>

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

Recall of Lee County Promotions		
	2008	2009
Total Respondents	204	207
Yes	23%	22%
No	<65%>	53%
Can't Recall	12%	<22%>

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



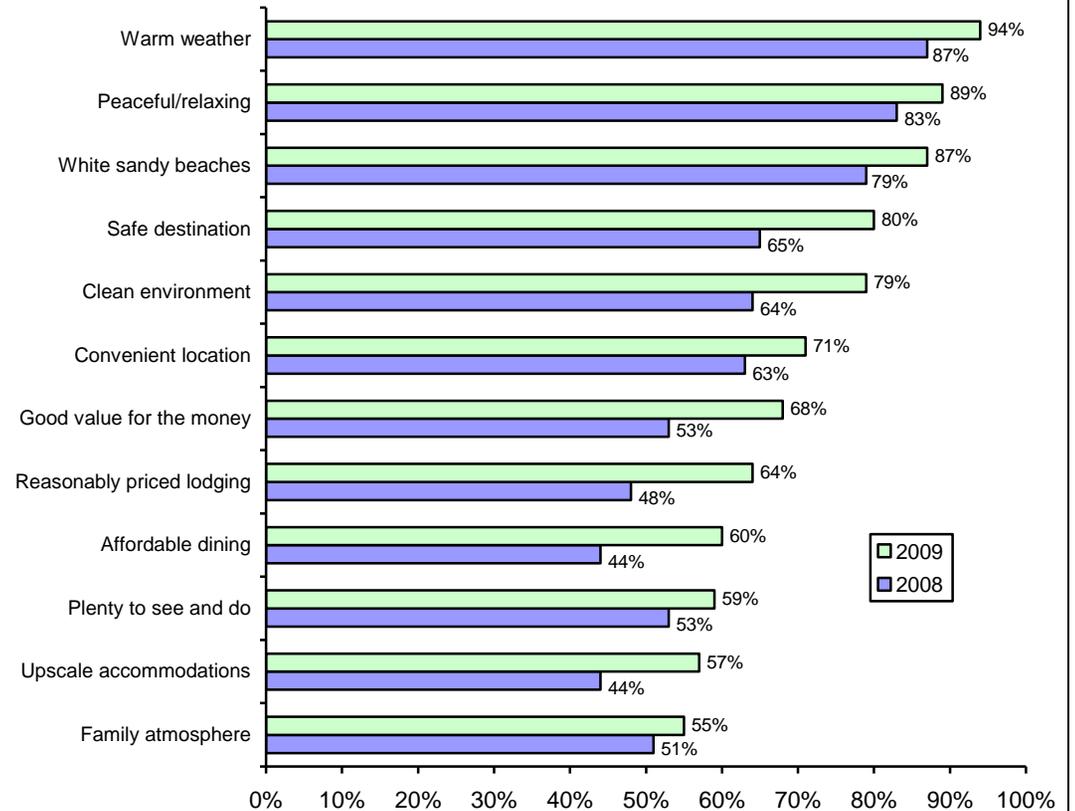
Travel Planning

November Travel Decision Influences*		
	2008	2009
Total Respondents	204	207
Warm weather	87%	<94%>
Peaceful/Relaxing	83%	89%
White sandy beaches	79%	<87%>
Safe destination	65%	<80%>
Clean environment	64%	<79%>
Convenient location	63%	71%
Good value for the money	53%	<68%>
Reasonably priced lodging	48%	<64%>
Affordable dining	44%	<60%>
Plenty to see and do	53%	59%
Upscale accommodations	44%	<57%>
Family atmosphere	51%	55%

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*

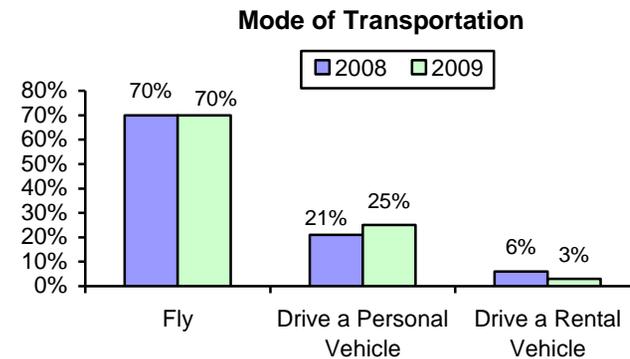




Trip Profile

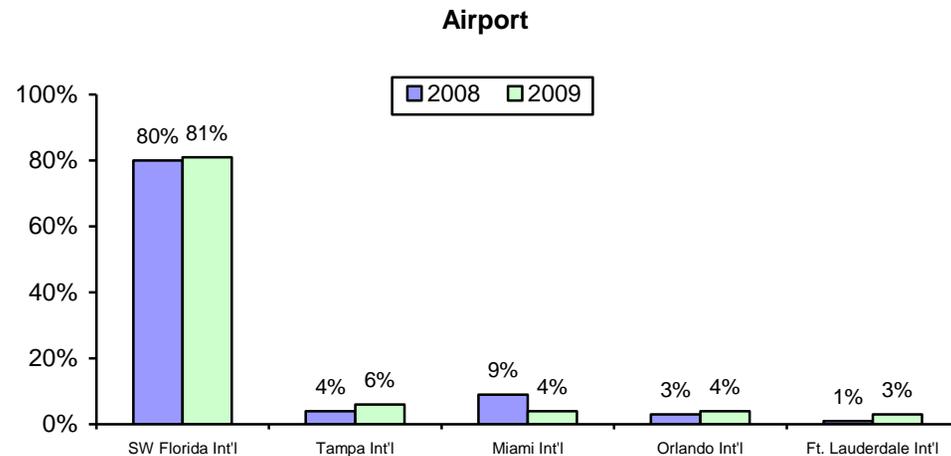
Mode of Transportation		
	2008	2009
Total Respondents	204	207
Fly	70%	70%
Drive a Personal Vehicle	21%	25%
Drive a Rental Vehicle	6%	3%
Drive an RV	2%	1%
Other/No answer	<1%	1%

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



Airport		
	2008	2009
Total Respondents who Arrived by Air	143	146
SW Florida Int'l	80%	81%
Tampa Int'l	4%	6%
Miami Int'l	9%	4%
Orlando Int'l	3%	4%
Ft. Lauderdale Int'l	1%	3%
Other/No Answer	2%	3%

Q2: At which Florida airport did you land?

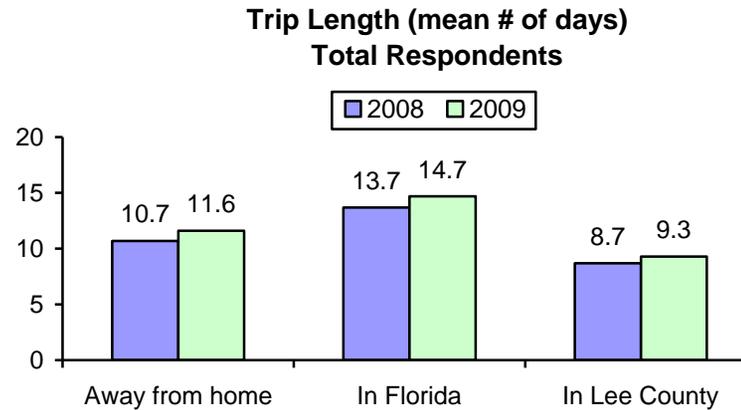




Trip Profile

November Trip Length Mean # of Days			
	Total Respondents		
	2008	2009	% Change
Total Respondents	204	207	
Away from home	10.7	11.6	8.4%
In Florida	10.4	11.0	5.8%
In Lee County	8.7	9.3	6.9%

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





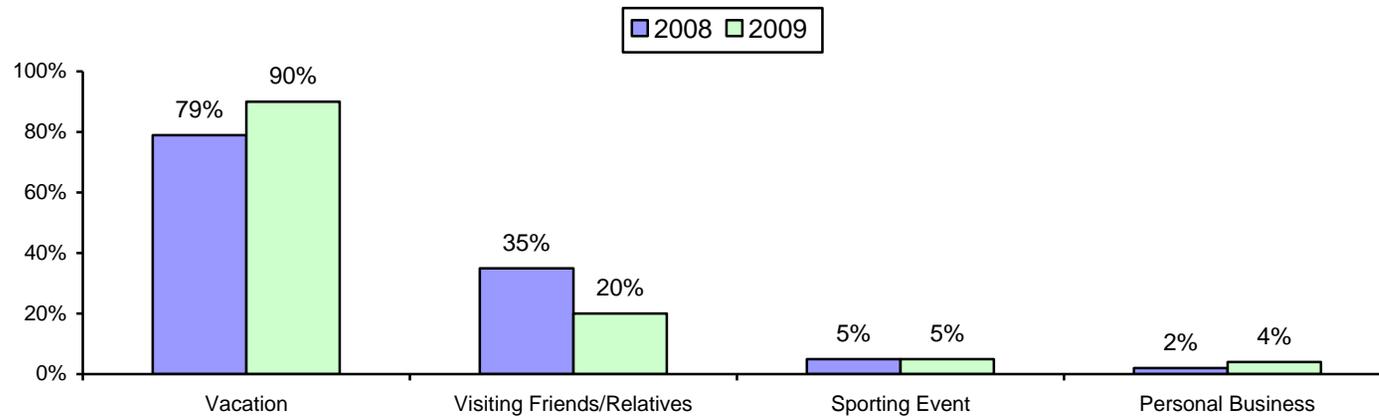
Trip Profile

Reason for November Visit		
	2008	2009
Total Respondents	204	207
Vacation	79%	<90%>
Visiting Friends/Relatives	<35%>	20%
Sporting Event	5%	5%
Personal Business	2%	4%
Conference/Meeting*	--	1%
Other Business Trip*	2%	1%
Other/No Answer	3%	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 November Visit





Trip Profile

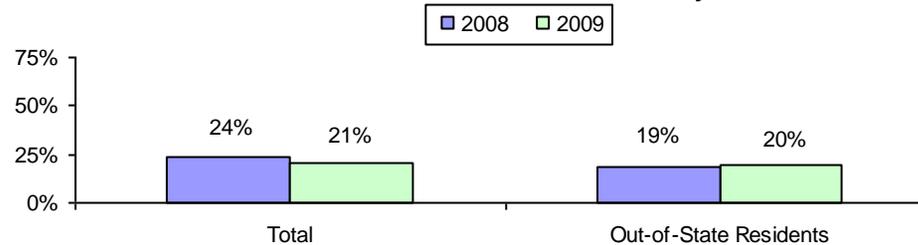
First Time Visitors to Lee County								
	Total		Florida Residents		Out-of-State Residents		International Visitors	
	2008	2009	2008	2009	2008	2009	2008	2009
Total Respondents	204	207	**	**	108	142	55*	44*
Yes	24%	21%	N/A	N/A	19%	20%	33%	25%
No	74%	79%	N/A	N/A	79%	79%	66%	75%
No answer	2%	1%	N/A	N/A	2%	1%	2%	--

Q20: Is this your first visit to Lee County?

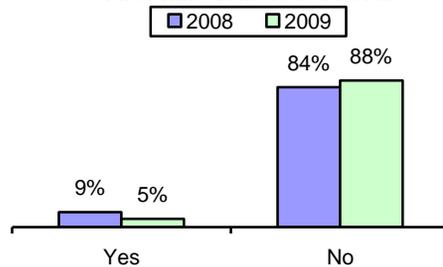
*Note: Small sample size (N<70). Please interpret results with caution.

**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	204	207
Yes	9%	5%
No	84%	88%
No Answer	2%	1%
FL Residents*	5%	6%

Q18. Is this your first visit to Florida?

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

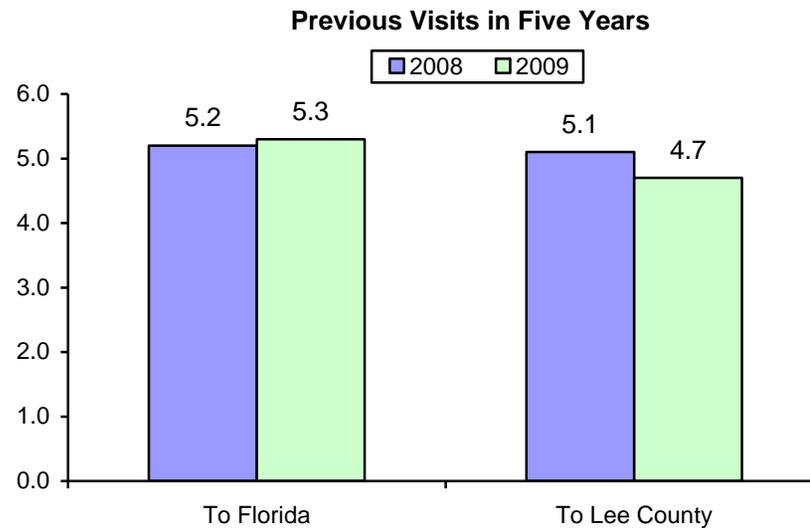


Trip Profile

Previous Visits in Five Years				
	Mean # of Visits To Florida		Mean # of Visits To Lee County	
	2008	2009	2008	2009
Base: Repeat Visitors	172 (FL res. Excl.)	183 (FL res. Excl.)	151	163
Number of visits	5.2	5.3	5.1	4.7

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

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



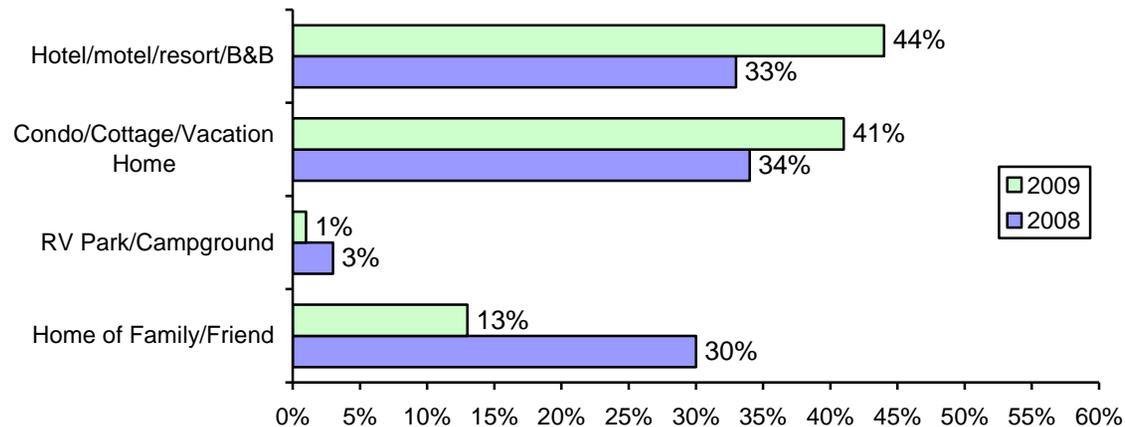


Trip Profile

Type of Accommodations – November Visitors		
	2008	2009
Total Respondents	204	207
Hotel/Motel/Resort/B&B	33%	<44%>
Hotel/motel/inn	25%	27%
Resort	9%	<18%>
B&B	--	--
Condo/Cottage/Vacation Home	34%	41%
Rented home/condo	23%	23%
Owned home/condo	3%	<13%>
Borrowed home/condo	7%	5%
RV Park/Campground	3%	1%
Home of family/friend	<30%>	13%
Day trip (no accommodations)	<1%>	--

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

Type of Accommodations - November Visitors

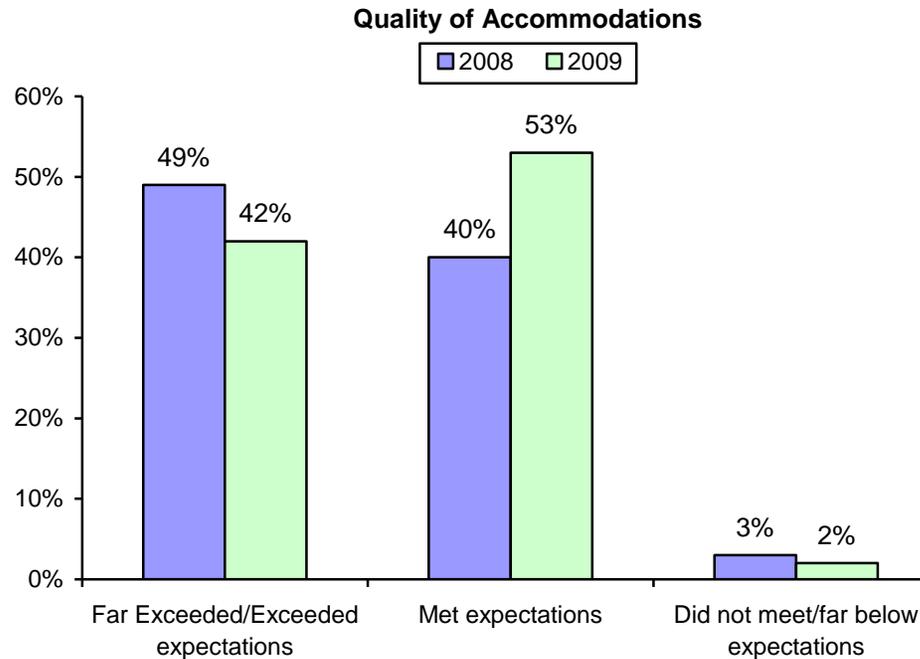




Trip Profile

Quality of Accommodations		
	2008	2009
Total Respondents	204	207
Far exceeded/Exceeded expectations	49%	42%
Met expectations	40%	<53%>
Did not meet/Far below expectations	3%	2%
No Answer	8%	2%

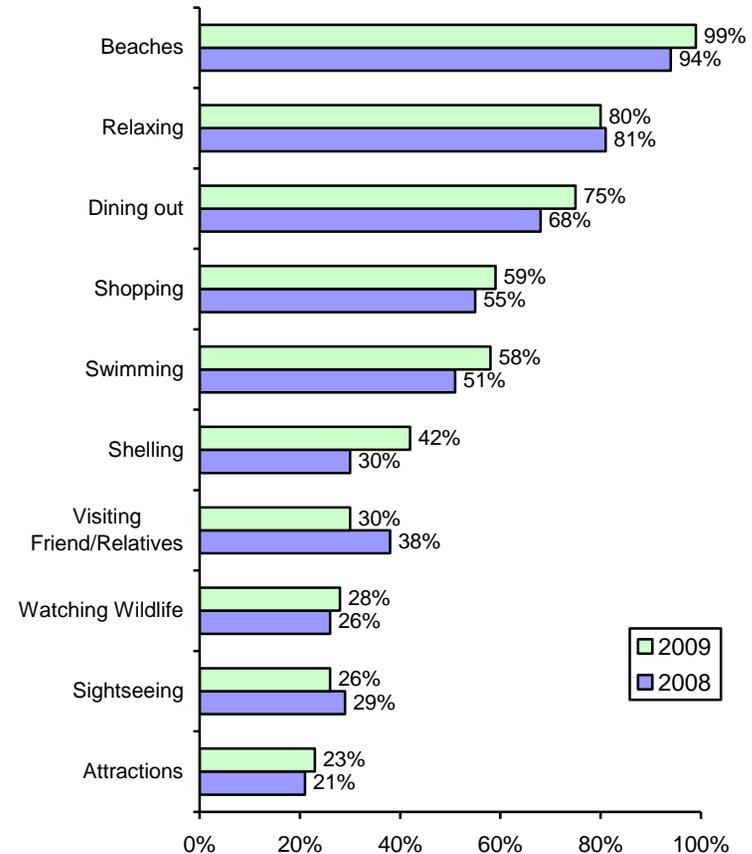
Q26: How would you describe the quality of your accommodations? Do you feel that they:





Trip Activities

November Activities Enjoyed		
	2008	2009
Total Respondents	204	207
Beaches	94%	<99%>
Relaxing	81%	80%
Dining out	68%	75%
Shopping	55%	59%
Swimming	51%	58%
Shelling	30%	<42%>
Visiting Friends/Relatives	38%	30%
Watching Wildlife	26%	28%
Sightseeing	29%	26%
Attractions	21%	23%
Photography	28%	21%
Birdwatching	17%	18%
Exercise/Working Out	13%	18%
Bars/Nightlife	22%	17%
Bicycle Riding	15%	17%
Fishing	10%	11%
Boating	13%	9%
Golfing	8%	8%
Miniature Golf	9%	7%
Cultural Events	4%	5%
Parasailing/Jet Skiing	4%	5%
Sporting Event	8%	5%
Guided Tour	4%	4%
Kayaking/Canoeing	6%	4%
Scuba Diving/Snorkeling	2%	2%
Tennis	4%	2%
Other	4%	2%

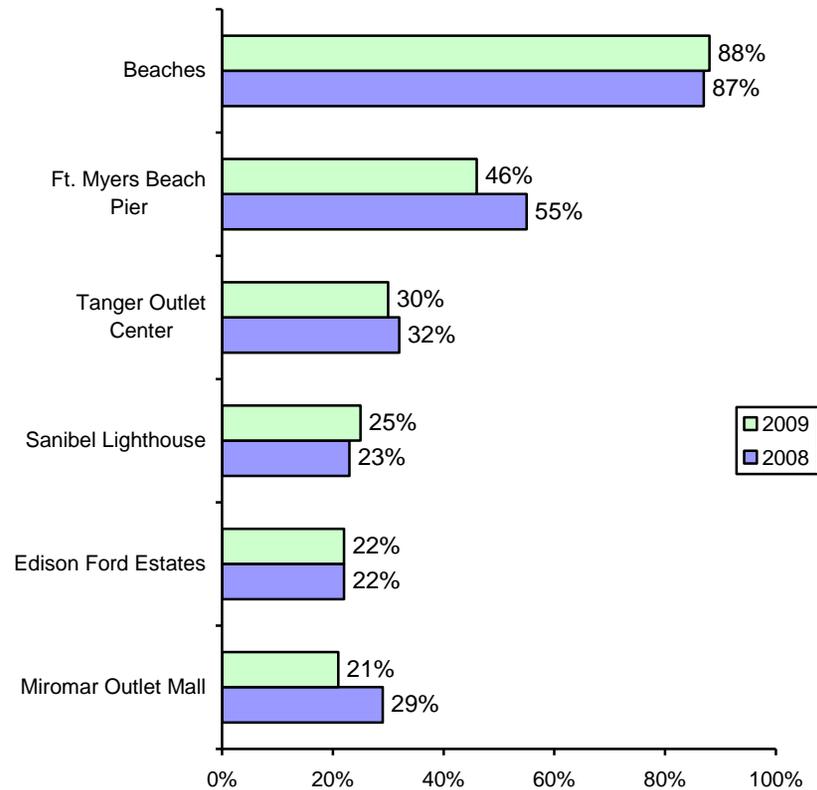


Q28: What activities or interests are you enjoying while in Lee County?
(Please mark ALL that apply.)



Trip Activities

November Attractions Visited		
	2008	2009
Total Respondents	204	207
Beaches	87%	88%
Ft. Myers Beach Pier	55%	46%
Tanger Outlet Center (Sanibel)	32%	30%
Sanibel Lighthouse	23%	25%
Edison Ford Estates	22%	22%
Miromar Outlet Mall	29%	21%
Ding Darling National Wildlife Refuge	16%	18%
Bell Tower Shops	16%	16%
Periwinkle Place	10%	15%
Edison Mall	13%	11%
Shell Factory and Nature Park	6%	8%
Gulf Coast Town Center	10%	7%
Coconut Point Mall	<15%>	6%
Manatee Park	4%	3%
Babcock Wilderness Adventures	--	2%
Bailey-Matthews Shell Museum	4%	2%
Barbara B. Mann Performing Arts Hall	<1%>	1%
Broadway Palm Dinner Theater	4%	1%
Other	7%	6%
None/No Answer	4%	3%



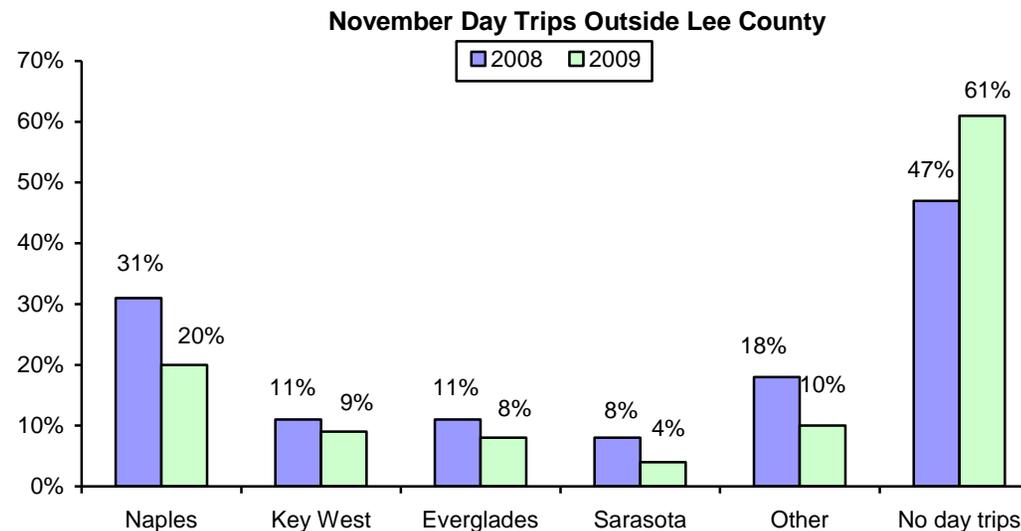
Q29: On this trip, which attractions are you visiting?
(Please mark ALL that apply.)



Trip Activities

November Day Trips Outside Lee County		
	2008	2009
Total Respondents	204	207
Any Day Trips (net)	<49%>	35%
<i>Naples</i>	<31%>	20%
<i>Key West</i>	11%	9%
<i>Everglades</i>	11%	8%
<i>Sarasota</i>	8%	4%
<i>Other</i>	<18%>	10%
No day trips	47%	<61%>
No answer	4%	4%

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



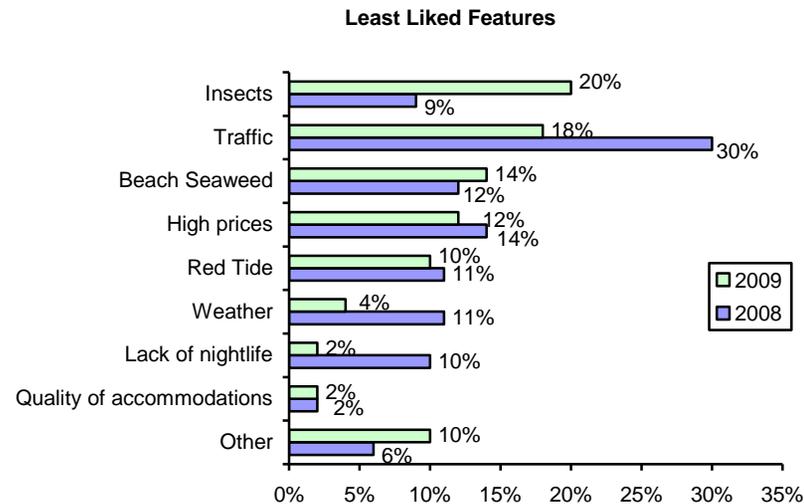


Lee County Experience

Least Liked Features		
	2008	2009
Total Respondents	204	207
Insects	9%	<20%>
Traffic	<30%>	18%
Beach seaweed	12%	14%
High prices	14%	12%
Red Tide	11%	10%
Weather	<11%>	4%
Lack of nightlife	<10%>	2%
Quality of accommodations	2%	2%
Other	6%	10%
Nothing/no answer	38%	39%

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.

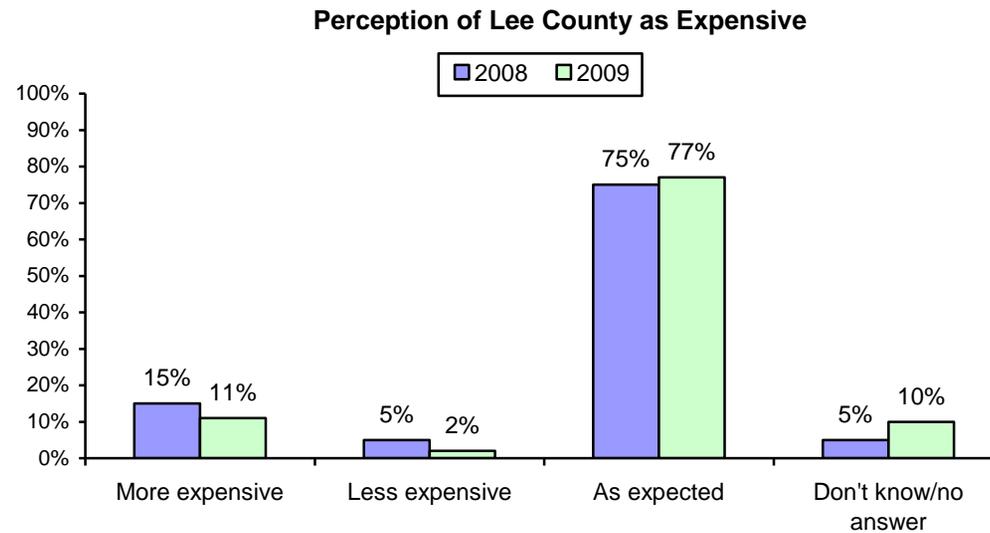




Lee County Experience

Perception of Lee County as Expensive		
	2008	2009
Total Respondents	204	207
More expensive	15%	11%
Less expensive	5%	2%
As expected	75%	77%
Don't know/no answer	5%	10%

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

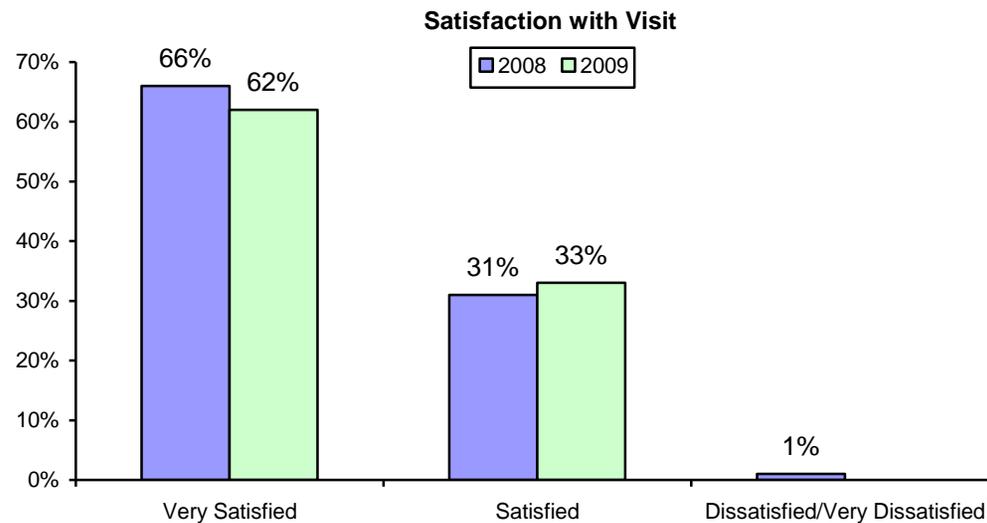




Lee County Experience

Satisfaction with Visit		
	2008	2009
Total Respondents	204	207
<u>Satisfied</u>	97%	95%
<i>Very Satisfied</i>	66%	62%
<i>Satisfied</i>	31%	33%
Neither	--	2%
Dissatisfied/Very Dissatisfied	1%	--
Don't know/no answer	2%	2%

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

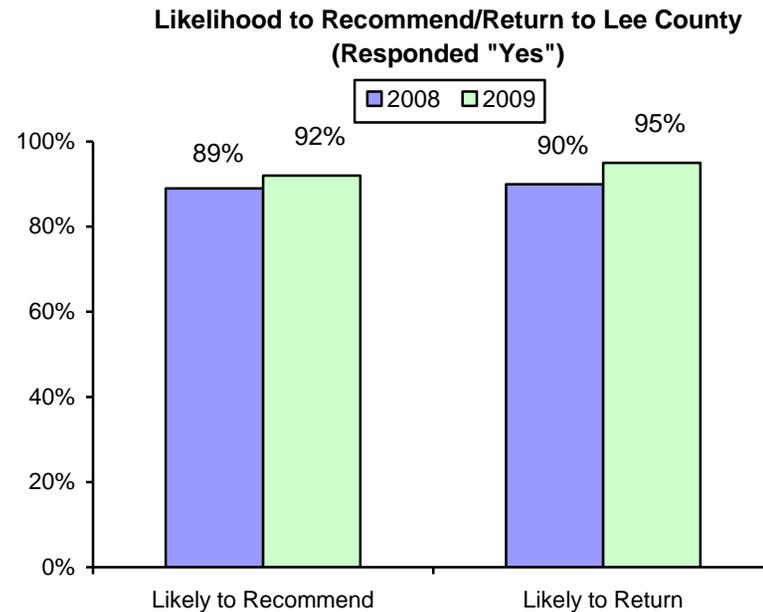




Future Plans

Likelihood to Recommend/Return to Lee County		
	2008	2009
Total Respondents	204	207
Likely to Recommend Lee County	89%	92%
Likely to Return to Lee County	90%	<95%>
Base: Total Respondents Planning to Return	183	197
Likely to Return Next Year	65%	68%

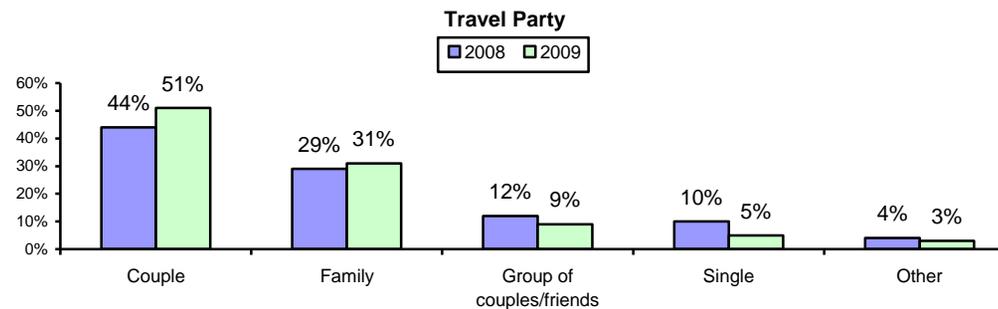
Q32: Would you recommend Lee County to a friend over other vacation areas in Florida?
 Q35: Will you come back to Lee County?
 Q36: Will you come back next year?





Visitor and Travel Party Demographic Profile

November Travel Party		
	2008	2009
Total Respondents	204	207
Couple	44%	51%
Family	29%	31%
Group of couples/friends	12%	9%
Single	10%	5%
Other	4%	3%
Mean travel party size	3.0	2.8
Mean adults in travel party	2.7	2.6



Travel Parties with Children		
	2008	2009
Total Respondents	204	207
Traveling with any Children (net)	17%	18%
Any younger than 6	12%	13%
Any 6 – 11 years old	8%	8%
Any 12 – 17 years old	5%	4%

Q22: On this trip, are you traveling:

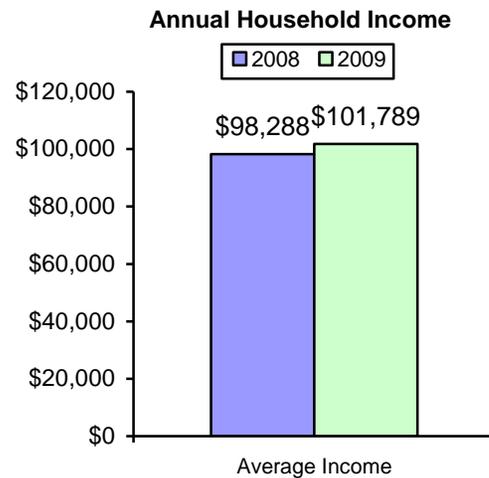
Q23: Including yourself, how many people are in your immediate travel party?

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

November Visitor Demographic Profile		
	2008	2009
Total Respondents	204	207
Vacations per year (mean)	2.7	3.0
Short getaways per year (mean)	4.4	3.8
Age of respondent (mean)	50.1	<52.8>
Annual household income (mean)	\$98,288	\$101,789
Marital Status		
Married	77%	76%
Single	11%	9%
Other	10%	12%



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 November Visitation					
	%		Visitor Estimates		% Change
	2008	2009	2008	2009	2008-2009
Paid Accommodations	51%	44%	162,579	161,644	-0.6%
Friends/Relatives	49%	56%	155,122	206,829	33.3%
<i>Total Visitation</i>			<i>317,701</i>	<i>368,473</i>	<i>16.0%</i>
November Visitor Origin – Visitors Staying in Paid Accommodations					
	2008	2009	2008	2009	
United States	67%	75%	108,386	120,705	11.4%
UK	8%	9%	12,193	14,663	20.3%
Germany	12%	7%	18,968	11,767	-38.0%
Canada	7%	6%	10,839	9,615	-11.3%
BeNeLux	1%	1%	1,355	2,297	69.5%
Austria	--	1%	--	1,298	--
Switzerland	--	1%	--	1,298	--
Scandinavia	4%	--	6,774	--	--
Ireland	3%	--	4,064	--	--
Other	1%	--	1,355	--	--
U.S. Region (Paid Accommodations)					
	2008	2009	2008	2009	
Florida	9%	10%	9,484	12,158	28.2%
South (including Florida)	24%	28%	25,742	33,750	31.1%
Midwest	31%	42%	33,871	51,191	51.1%
Northeast	19%	24%	20,322	28,810	41.8%
West	5%	3%	5,419	3,595	-33.7%
No Answer	23%	3%	24,387	3,359	-86.2%
2009 Top DMAs (Paid Accommodations)					
Detroit		8%	9,053		
Boston (Manchester, NH)		6%	7,772		
Indianapolis		6%	6,837		
New York		6%	6,583		
Chicago		5%	5,875		
Miami-Fort Lauderdale		5%	5,648		
Saint Louis		4%	4,476		
Atlanta		3%	3,477		
Cleveland-Akron (Canton)		3%	3,477		
Tampa-Saint Petersburg (Sarasota)		3%	3,405		
Minneapolis-Saint Paul		3%	3,359		



Occupancy Data Analysis November 2009

Property managers representing 152 properties in Lee County were interviewed for the November 2009 Occupancy Survey between November 1 and November 15, 2009, a sample considered accurate to plus or minus 7.9 percentage points at the 95% confidence level.

Property managers representing 137 properties in Lee County were interviewed for the November 2008 Occupancy Survey between December 1 and December 15, 2008, a sample considered accurate to plus or minus 8.5 percentage points at the 95% confidence level.



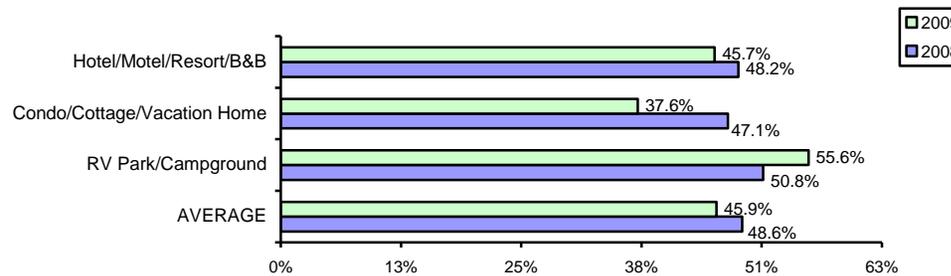
November Occupancy/Daily Rates

	Average Occupancy Rate - %			Average Daily Rate - \$			RevPAR - \$		
	2008	2009	% Change	2008	2009	% Change	2008	2009	% Change
Property Managers Responding	135	144		135	146		135/135	144/146	
Hotel/Motel/Resort/B&B	48.2%	45.7%	-5.2%	\$123.29	\$107.50	-12.8%	\$59.37	\$49.09	-17.3%
Condo/Cottage/Vacation Home	47.1%	37.6%	-20.2%	\$137.15	\$133.17	-2.9%	\$64.56	\$50.06	-22.5%
RV Park/Campground	50.8%	55.6%	9.4%	\$40.40	\$37.48	-7.2%	\$20.52	\$20.86	1.7%
AVERAGE	48.6%	45.9%	-5.6%	\$104.12	\$94.16	-9.6%	\$50.56	\$43.25	-14.5%

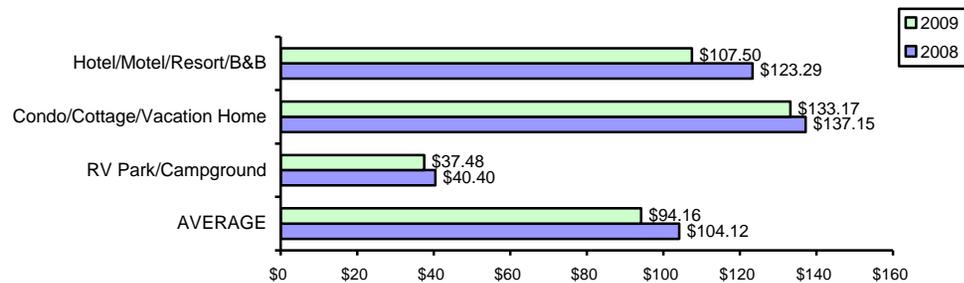
Q16: What was your overall average occupancy rate for the month of November?

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

Average Occupancy Rate



Average Daily Rate

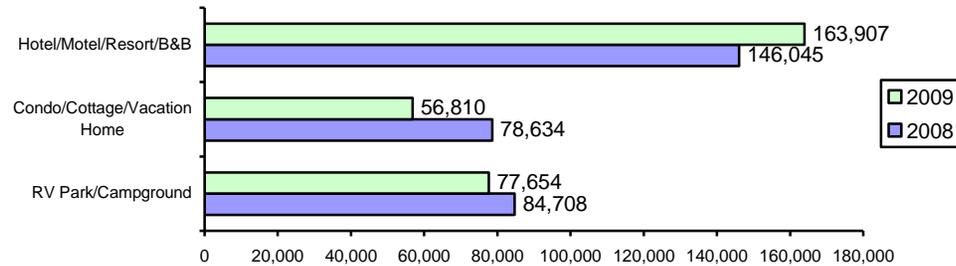




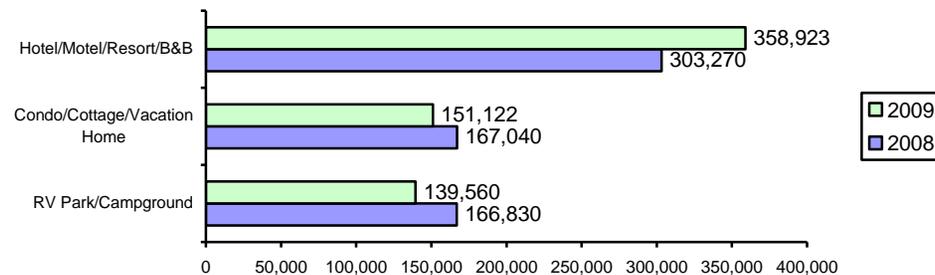
November Room/Unit/Site Nights

	Occupied Room Nights			Available Room Nights		
	2008	2009	% Change	2008	2009	% Change
Hotel/Motel/Resort/B&B	146,045	163,907	12.2%	303,270	358,923	18.4%
Condo/Cottage/Vacation Home	78,634	56,810	-27.8%	167,040	151,122	-9.5%
RV Park/Campground	84,708	77,654	-8.3%	166,830	139,560	-16.3%
Total	309,387	298,371	-3.6%	637,140	649,605	2.0%

Occupied Room Nights



Available Room Nights

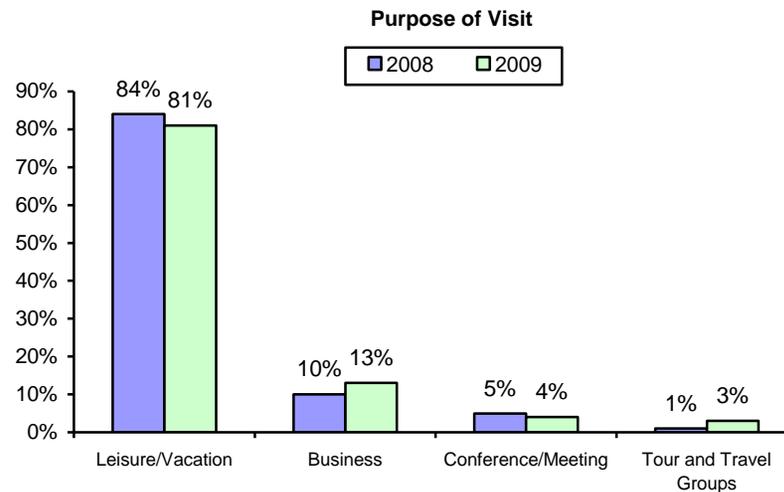




Lodging Management Estimates

November Guest Profile		
	2008	2009
Property Managers Responding	110	122
Purpose of Visit		
Leisure/Vacation	84%	81%
Business	10%	13%
Conference/Meeting	5%	4%
Tour and Travel Groups	1%	3%
Property Managers Responding	128	138
Average guests per room	2.6	2.4
Property Managers Responding	127	137
Average length of stay in nights	7.3	6.2

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

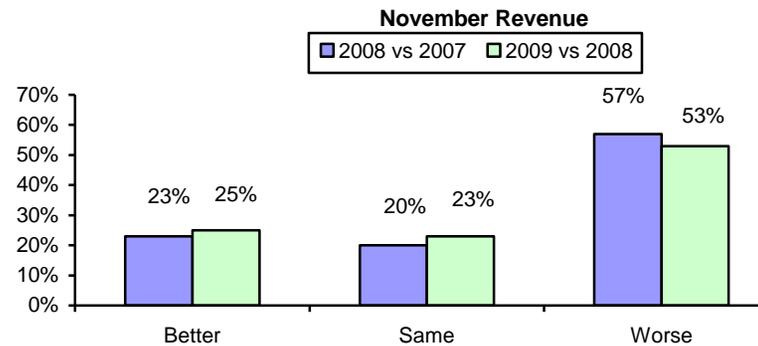
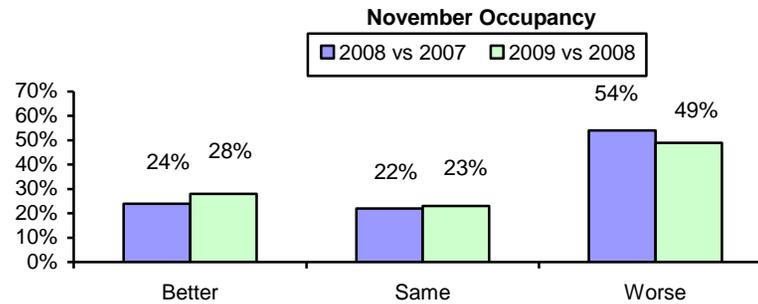




Occupancy Barometer

	November Occupancy		November Revenue	
	2008	2009	2008	2009
Property Managers Responding	133	137	129	133
Better than prior year	24%	28%	23%	25%
Same as prior year	22%	23%	20%	23%
Worse than prior year	54%	49%	57%	53%

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

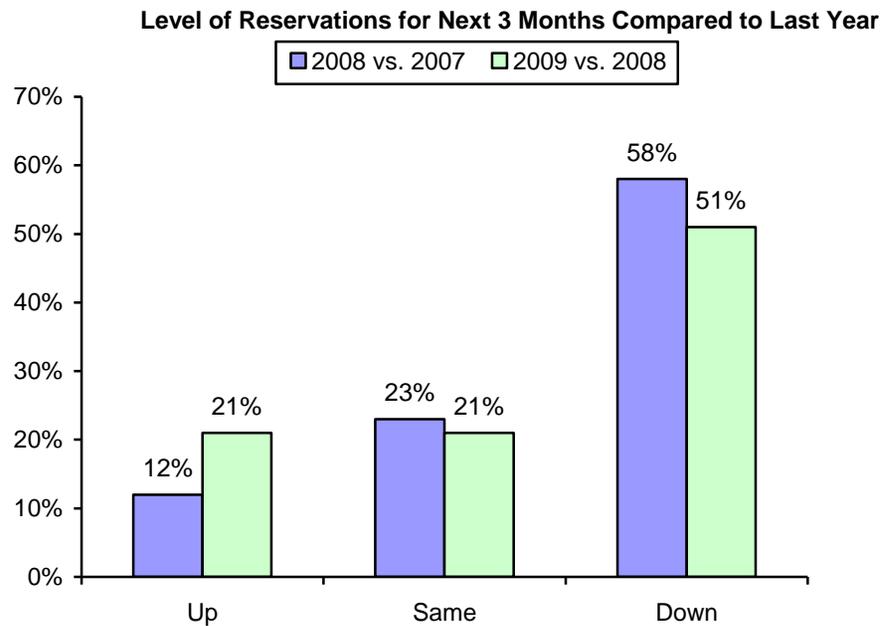




Occupancy Barometer

Level of Reservations for Next 3 Months Compared to Last Year		
	2008	2009
Property Managers Responding	133	135
Up	12%	21%
Same	23%	21%
Down	58%	51%

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



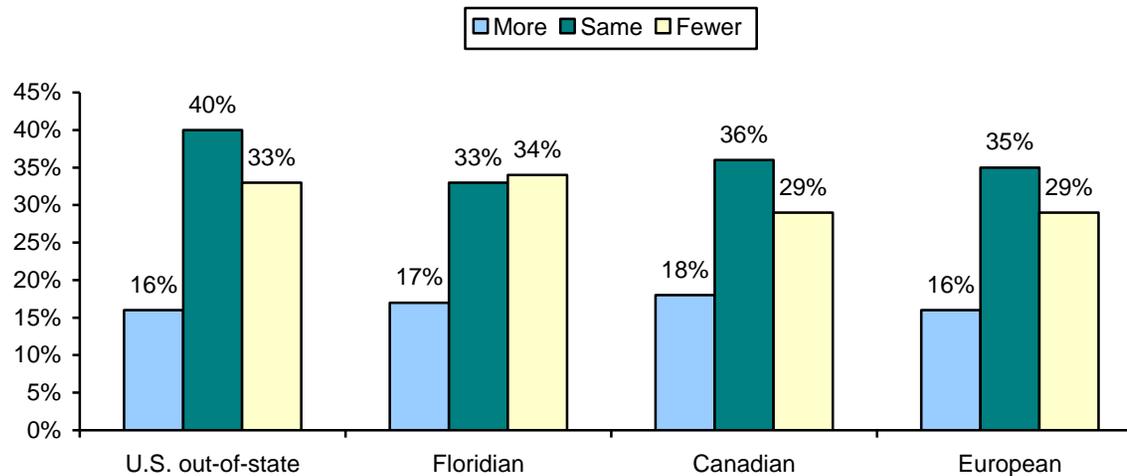


Occupancy Barometer

Origin of Guests for Next 3 Months Compared to Last Year								
Property Managers Responding (113/124 Minimum)	More		Same		Fewer		Not Applicable	
	2008	2009	2008	2009	2008	2009	2008	2009
U.S. out-of-state	17%	16%	29%	40%	42%	33%	12%	11%
Floridian	21%	17%	37%	33%	35%	34%	7%	<16%>
Canadian	13%	18%	29%	36%	<44%>	29%	15%	17%
European	19%	16%	28%	35%	35%	29%	18%	20%

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



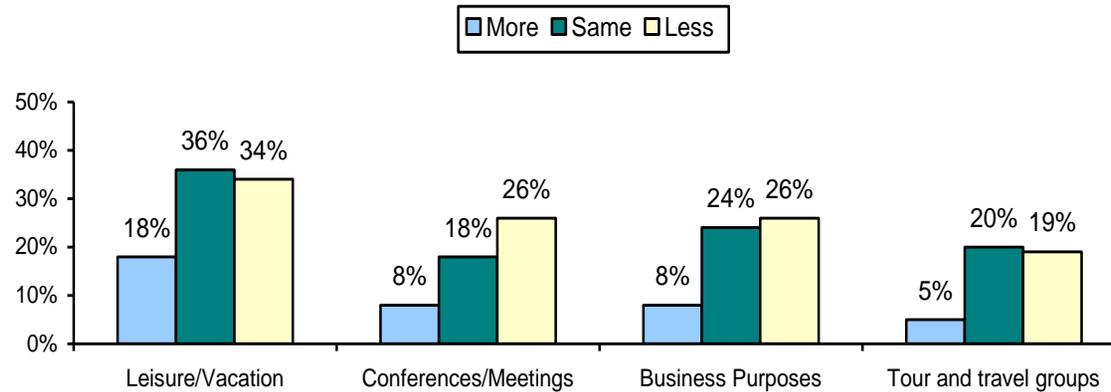


Occupancy Barometer

Type of Travelers for Next 3 Months Compared to Last Year								
Property Managers Responding (77/118 Minimum)	More		Same		Less		Not Applicable	
	2008	2009	2008	2009	2008	2009	2008	2009
Leisure/vacation	19%	18%	33%	36%	37%	34%	11%	12%
Conferences/Meetings	5%	8%	23%	18%	34%	26%	39%	49%
Business Purposes	3%	8%	28%	24%	35%	26%	34%	42%
Tour and travel groups	5%	5%	14%	20%	27%	19%	53%	55%

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

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





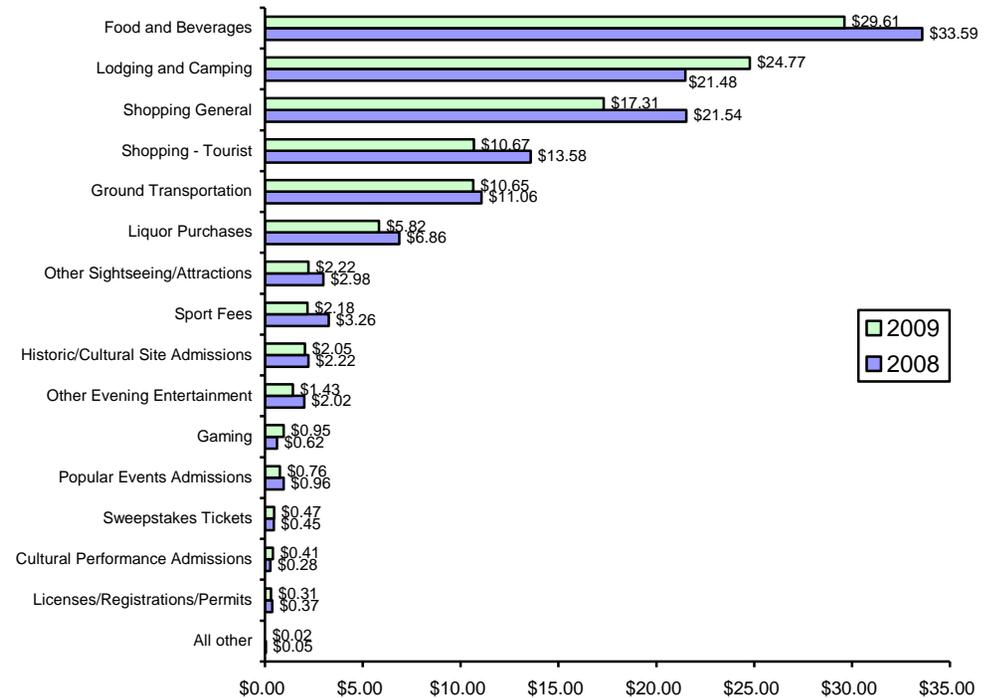
Economic Impact Analysis November 2009



Average Expenditures

November Average Expenditures per Person per Day			
	2008	2009	% Change
TOTAL	\$121.33	\$109.63	-9.6%
Food and Beverages	\$33.59	\$29.61	-11.8%
Lodging Accommodations	\$21.48	\$24.77	15.3%
Shopping-General	\$21.54	\$17.31	-19.6%
Shopping-Tourist	\$13.58	\$10.67	-21.4%
Ground Transportation	\$11.06	\$10.65	-3.7%
Liquor Purchases	\$6.86	\$5.82	-15.2%
Other Sightseeing/Attractions	\$2.98	\$2.22	-25.5%
Sport Fees	\$3.26	\$2.18	-33.1%
Historic/Cultural Site Admissions	\$2.22	\$2.05	-7.7%
Other Evening Entertainment	\$2.02	\$1.43	-29.2%
Gaming	\$0.62	\$0.95	53.2%
Popular Events Admissions	\$0.96	\$0.76	-20.8%
Sweepstakes Tickets	\$0.45	\$0.47	4.4%
Cultural Performance Admissions	\$0.28	\$0.41	46.4%
Licenses/Registrations/Permits	\$0.37	\$0.31	-16.2%
All Other	\$0.05	\$0.02	-60.0%

Average Expenditures per Person per Day

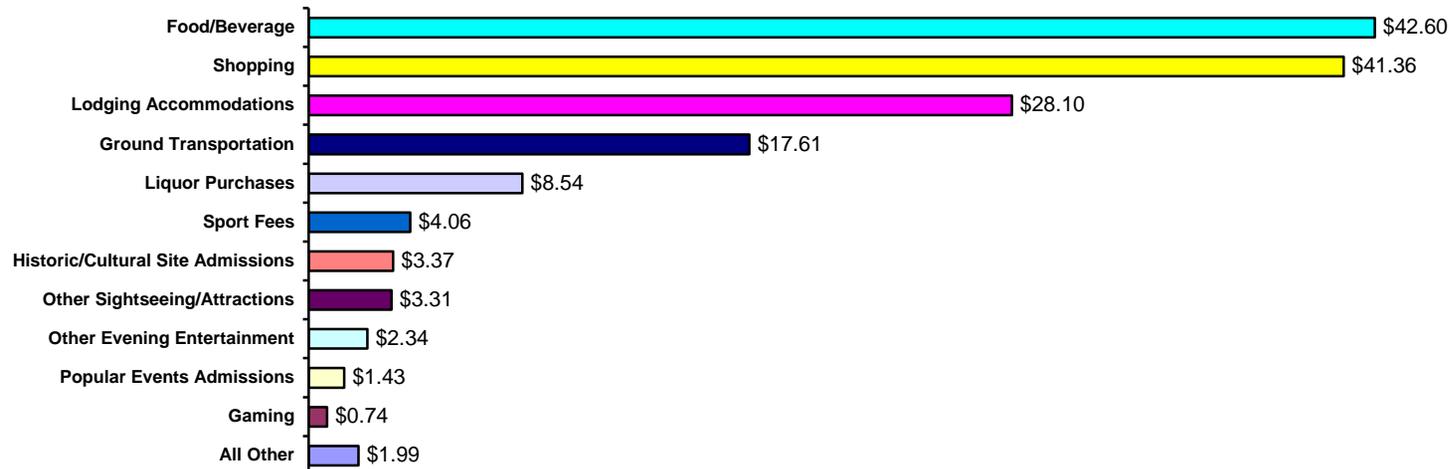




Total Visitor Expenditures by Spending Category

	NOVEMBER TOTAL EXPENDITURES		
	2008	2009	% Change
TOTAL	\$209,030,611	\$155,446,477	-25.6%
Food and Beverages	\$57,177,820	\$42,597,252	-25.5%
Shopping	\$64,284,446	\$41,355,967	-35.7%
Lodging Accommodations	\$32,213,259	\$28,095,062	-12.8%
Ground Transportation	\$19,576,053	\$17,610,866	-10.0%
Liquor Purchases	\$12,167,822	\$8,543,446	-29.8%
Sport Fees	\$5,077,760	\$4,061,846	-20.0%
Historic/Cultural Site Admissions	\$4,117,022	\$3,374,712	-18.0%
Other Sightseeing/Attractions	\$5,327,549	\$3,311,194	-37.8%
Other Evening Entertainment	\$4,081,173	\$2,342,356	-42.6%
Popular Events Admissions	\$1,852,431	\$1,425,183	-23.1%
Gaming	\$1,299,169	\$741,664	-42.9%
All Other	\$1,856,107	\$1,986,929	7.0%

November 2009 Total Expenditures
(Millions)





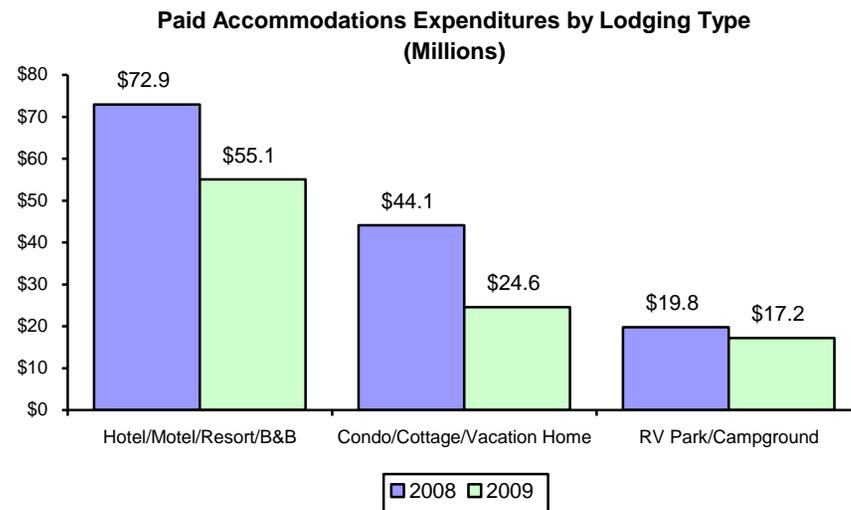
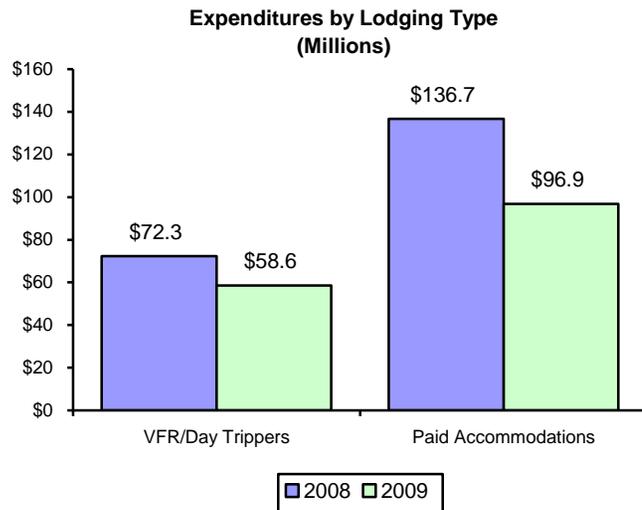
Total Visitor Expenditures by Spending Category

	ALL PROPERTIES					
	Staying in Paid Accommodations			Visiting Friends and Relatives/ Day Trippers		
	2008	2009	% Change	2008	2009	% Change
TOTAL	\$136,774,754	\$96,854,719	-29.2%	\$72,255,857	\$58,591,758	-18.9%
Lodging Accommodations	\$32,213,259	\$28,095,062	-12.8%	\$0	\$0	--
Shopping	\$39,298,313	\$23,302,004	-40.7%	\$24,986,133	\$18,053,963	-27.7%
Food and Beverages	\$32,365,178	\$23,123,026	-28.6%	\$24,812,642	\$19,474,226	-21.5%
Ground Transportation	\$12,243,902	\$9,075,638	-25.9%	\$7,332,151	\$8,535,228	16.4%
Liquor Purchases	\$6,658,900	\$4,154,480	-37.6%	\$5,508,922	\$4,388,966	-20.3%
Other Sightseeing/Attractions	\$3,130,344	\$2,027,819	-35.2%	\$2,197,205	\$1,283,375	-41.6%
Sport Fees	\$3,372,641	\$1,840,309	-45.4%	\$1,705,119	\$2,221,537	30.3%
Historic/Cultural Site Admissions	\$3,036,965	\$1,775,757	-41.5%	\$1,080,057	\$1,598,955	48.0%
Other Evening Entertainment	\$1,955,157	\$1,193,013	-39.0%	\$2,126,016	\$1,149,343	-45.9%
Gaming	\$485,249	\$696,034	43.4%	\$813,920	\$45,630	-94.4%
Popular Events Admissions	\$988,365	\$657,655	-33.5%	\$864,066	\$767,528	-11.2%
All Other	\$1,026,481	\$913,922	-11.0%	\$829,626	\$1,073,007	29.3%



Total Visitor Expenditures by Lodging Type

November Total Expenditures by Lodging Type					
	2008	2009	% Change	2008	2009
TOTAL	\$209,030,611	\$155,446,477	-25.6%	100%	100%
Visiting Friends & Relatives/Day Trippers	\$72,255,857	\$58,591,758	-18.9%	35%	38%
Paid Accommodations	\$136,774,754	\$96,854,719	-29.2%	65%	62%
<i>Hotel/Motel/Resort/B&B</i>	\$72,897,835	\$55,060,574	-24.5%	35%	35%
<i>Condo/Cottage/Vacation Home</i>	\$44,093,172	\$24,571,937	-44.3%	21%	16%
<i>RV Park/Campground</i>	\$19,783,747	\$17,222,208	-12.9%	9%	11%





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.



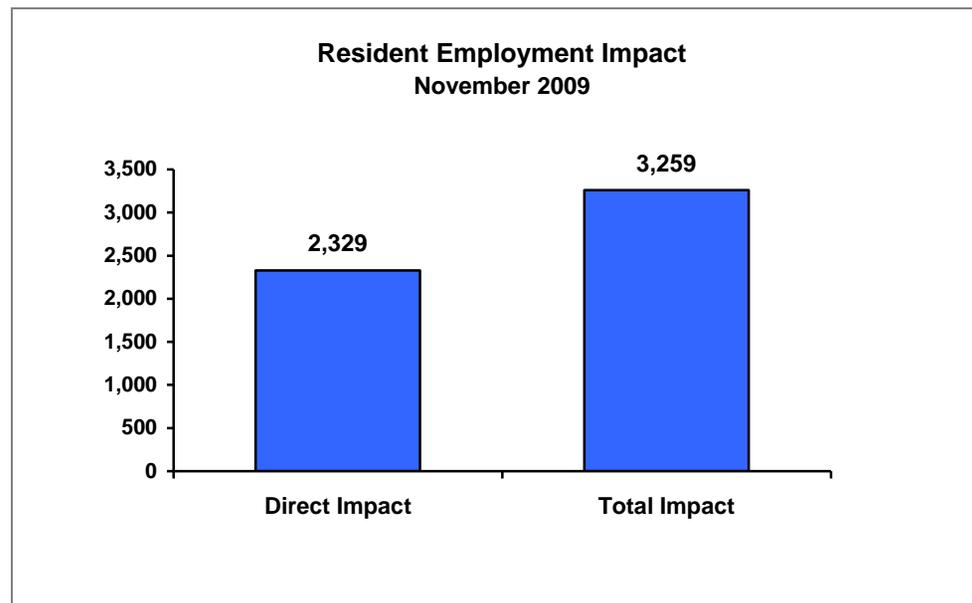
Impact on Jobs for Lee County Residents

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.).





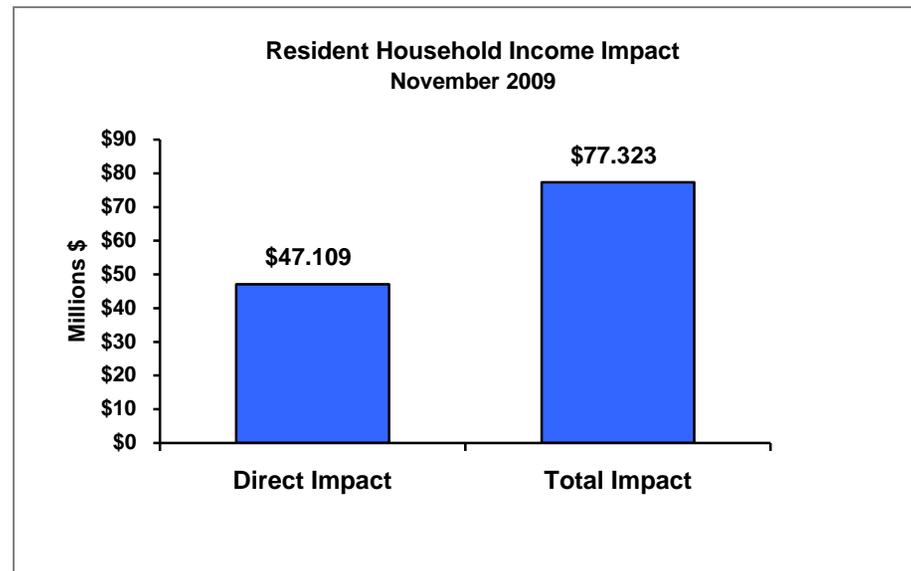
Impact on Household Income for Lee County Residents

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.

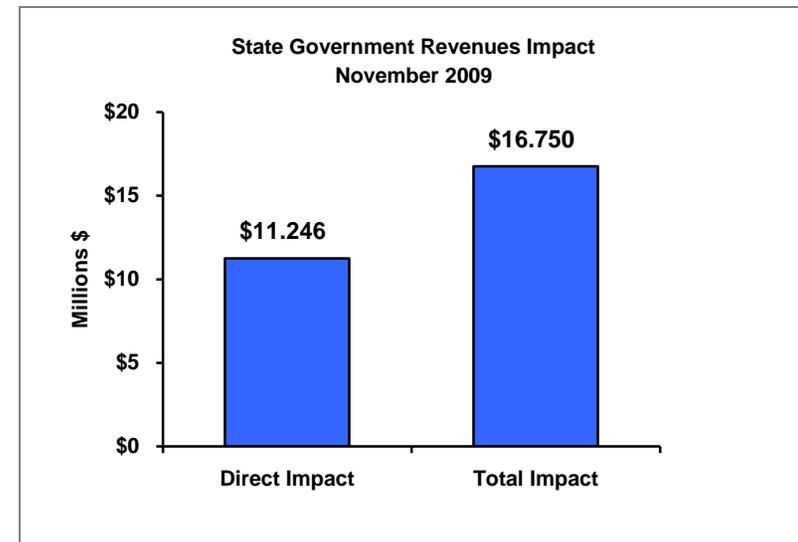
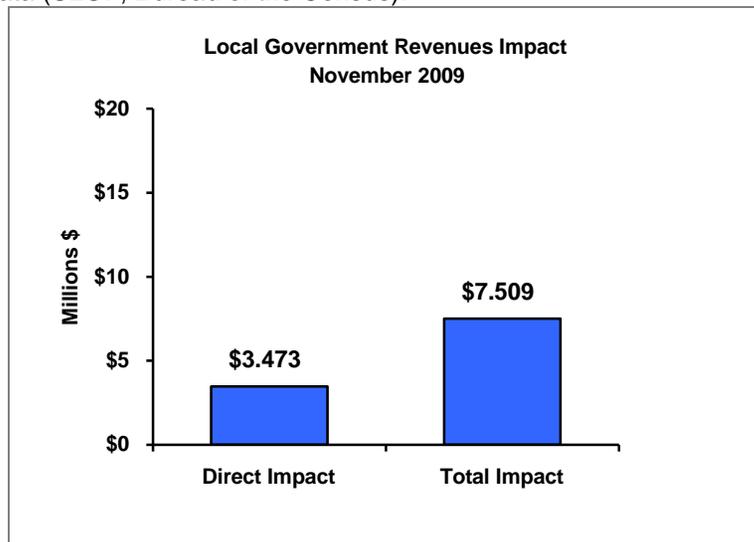
The gross government revenues accruing to governments as a result of producing the output purchased with visitor expenditures is the government revenue impact.

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 November 2009



November 2009 Interviewing Statistics

Visitor Profile Interviewing Statistics			
City	Event/Location	Interviewing Dates	Number of Interviews*
Fort Myers Beach	Diamond Head Resort	3-November	7
Fort Myers Beach	Neptune Inn	3-November	8
Fort Myers Beach	The Pier	3-November	13
Sanibel	Holiday Inn	10-November	7
Sanibel	Sanibel Arms	10-November	7
Sanibel	Sanibel Inn	10-November	6
Sanibel	Tortuga Beach Club	10-November	5
Bonita Springs	Bonita Beach	14-November	21
Cape Coral	Cape Coral Yacht Club	14-November	8
Ft. Myers	Best Western	17-November	8
Sanibel	Casa Ybel	19-November	5
Sanibel	Lighthouse Beach	19-November	14
Sanibel	Pointe Santo	19-November	6
Sanibel	Tarpon Beach	19-November	6
Bonita Springs	Dog Beach	21-November	8
Ft. Myers	Edison Estates	25-November	29
North Ft. Myers	Shell Factory	25-November	11
Fort Myers Beach	Bel-Air Beach Club	27-November	4
Fort Myers Beach	Pink Shell Resort	27-November	6
Fort Myers Beach	Times Square	27-November	19
Ft. Myers	Centennial Park	28-November	9
TOTAL			207

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



Occupancy Interviewing Statistics

Interviews were conducted from November 1 – November 15, 2009. Information was provided by 152 Lee County lodging properties.

November 2009

Lodging Type	Number of Interviews
Hotel/Motel/Resort/B&B	99
Condo/Cottage/Vacation Home/Timeshare	36
RV Park/Campground	17
Total	152