



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

**August 2009 Visitor Profile and Occupancy Analysis
October 8, 2009**

Prepared for:

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

Prepared by:



providing direction in travel & tourism



Executive Summary August 2009

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



Executive Summary

Visitor Estimates

- Lee County hosted nearly 200,000 visitors staying in paid accommodations during the month of August 2009, and approximately 125,000 staying with friends or relatives while visiting the County, for a total of 318,859 visitors.
- Total visitation in August 2009 was down 7% from August 2008, with a substantial increase in those staying in paid accommodations (+31.4%) and a substantial decrease in those staying with friends and relatives (-36.1%).
- Three-quarters of August 2009 visitors staying in paid accommodations were U.S. residents (76%), a significantly higher proportion than in August 2008 (62%). The prevalence of visitors from Germany was about the same year-over-year, but Lee County had a lower share of visitors from the United Kingdom (7% vs. 15% August 2008).
- Similar to August 2008, slightly fewer than half of U.S. visitors staying in paid accommodations came from the South (46%), with more than half of those being Florida residents (28%). Another three visitors in ten were from the Midwest (29%). The incidence of visitors from the Northeast and West was greater during August 2009 than in the prior year.

Visitor Expenditures

- The average per person per day expenditure was \$102.13 in August 2009 – an 8.2% decline from August 2008 (\$111.25). The August average expenditure was also down somewhat from that in July (\$109.65).
- Total visitor expenditures for August 2009 are estimated at \$130 million, a 27.7% drop from \$180 million in August 2008. Expenditures among those staying in paid accommodations decreased 15% from August 2008 to August 2009, hurt by declines in average daily rates. August 2009 expenditures among those staying with friends and relatives decreased even more compared to August 2008 (42.5%), due to a decrease in the number of visitors as well as in the average expenditures per person per day.



Total August Visitation					
	%		Visitor Estimates		% Change 2008-2009
	2008	2009	2008	2009	
Paid Accommodations	43%	61%	147,856	194,292	31.4%
Friends/Relatives	57%	39%	195,077	124,567	-36.1%
<i>Total Visitation</i>			342,933	318,859	-7.0%
August Visitor Origin – Visitors Staying in Paid Accommodations					
	2008	2009	2008	2009	
United States	62%	76%	91,358	147,625	61.6%
Germany	11%	9%	16,829	17,062	1.4%
United Kingdom	15%	7%	22,840	14,354	-37.2%
BeNeLux	4%	3%	6,010	5,692	-5.3%
Canada	2%	2%	3,606	2,965	-17.8%
France	2%	1%	2,404	2,658	10.6%
Scandinavia	--	1%	--	1,454	--
Austria	1%	1%	1,202	1,329	10.6%
Switzerland	--	1%	--	1,153	--
Ireland	2%	--	3,606	--	--
U.S. Region (Paid Accommodations)					
	2008	2009	2008	2009	
Florida	25%	28%	22,840	41,693	82.5%
South (including Florida)	46%	46%	42,073	68,184	62.1%
Midwest	29%	29%	26,446	43,024	62.7%
Northeast	8%	16%	7,212	23,716	228.8%
West	1%	4%	1,202	5,441	352.7%
No Answer	16%	5%	14,425	7,260	-49.7%

2009 Top DMAs (Paid Accommodations)		
Miami-Fort Lauderdale	13%	19,369
Tampa-Saint Petersburg (Sarasota)	9%	12,883
New York	8%	12,463
Indianapolis	5%	7,317
Washington, DC (Hagerstown)	4%	6,045
Cleveland-Akron (Canton)	4%	5,504
West Palm Beach-Fort Pierce	4%	5,447
Philadelphia	3%	3,987



Trip Planning

- Overall, the majority of August 2009 visitors said they had visited web sites while planning their trip (85%). Visitors most often mentioned search engines as the websites visited (40%) followed by airline sites (28%), booking sites (26%), hotel sites (25%), and Trip Advisor (23%). August 2009 visitors were more likely to use Trip Advisor than were August 2008 visitors (14%).
- *Family atmosphere* was an influential attribute for more visitors in August 2009 when selecting Lee County as a travel destination (70%) when compared with visitors in August 2008 (58%). The greater prevalence of families traveling with children in Lee County during August 2009 versus August 2008 (as noted later) likely contributed to such a difference.

Visitor Profile

- Similar to August 2008, slightly more visitors said they were staying in a condo/vacation home (43%) than were staying in a hotel/motel (37%). One visitor in five said they were staying at the home of friend or family member (17%). Nearly half felt that the quality of accommodations *far exceeded or exceeded their expectations* (45%).
- The top activities enjoyed while in Lee County during August 2009 were *beaches, relaxing, swimming, and dining out*. Visitor satisfaction remains extremely high, with 95% of August 2009 visitors reporting being *very satisfied* (60%) or *satisfied* (35%) with their visit. The vast majority indicated they were likely to return to Lee County (86%), and half of those are likely to return next year (51%).
- August 2009 visitors were less likely than August 2008 visitors to express dissatisfaction with *beach seaweed* (21% vs. 38%). Visitors' concerns about *high prices* were more widespread during August 2009 than the prior year, although still at fairly low levels (11% vs. 4% August 2008).
- Day trips outside of Lee County were less prevalent among visitors during August 2009 when compared with August 2008. Only two visitors in five (38%) took a day trip outside Lee County during August 2009, whereas fully half did so the prior year (49%).
- Not surprisingly, the year-over-year decline in visitors staying with friends or family led to some differentiations in the profile of visitors. August 2009 visitors were less likely than August 2008 visitors to indicate:
 - Visiting friends/relatives as their trip purpose (15% vs. 26%);
 - Visiting friends/relatives as a trip activity (18% vs. 30%); and
 - Staying at the home of family/friend as their accommodation type (17% vs. 25%).



- The demographic profile of August 2009 visitors and their travel parties was significantly different from those in August 2008 on several characteristics as well.
 - The average household income was dramatically higher in August 2009 vs. August 2008 (\$110,122 vs. \$99,002). In fact, the average income was higher than most other months in the past year. The proportion of visitors in the upper income range (\$150,000 or more) was higher in August 2009 than in 2008 (24% vs. 15%).
 - Two-thirds of August 2009 visitors were traveling as a family – more than did so last year (66% vs. 54%). Likewise, six in ten had children with them versus only four in ten who did so in August 2008 (60% vs. 39%). Naturally, children also increased the travel party size (4.0 vs. 3.5).



Lodging Property Manager Assessments

- Overall, the number of *available* room nights was about the same in August 2009 as in the August prior. Notably, *occupied* room nights increased by 12.3%. Hotel/motel/resort *available* room nights were up 4.1% from a year ago and occupied room nights also rose (+4.0%). RV parks/campgrounds also experienced an increase in available room nights (+2.1%), as well as occupied room nights (+22.4%). Condos/vacation homes saw a drop in *available* room nights but an increase in *occupied* room nights (-6.7% in available and +30.9% in occupied room nights).

	Occupied Room Nights			Available Room Nights		
	2008	2009	% Change	2008	2009	% Change
Hotel/Motel/Resort/B&B	149,137	155,518	4.0%	334,168	347,980	4.1%
Condo/Cottage/Vacation Home	49,593	64,899	30.9%	168,206	156,978	-6.7%
RV Park/Campground	27,980	34,240	22.4%	149,610	152,737	2.1%
Total	226,710	254,657	12.3%	651,984	657,695	0.9%

- Accordingly, August 2009 saw an increase in average occupancy rates (+11.2%). Average occupancy rates increased from August 2008 (34.8%) to an average of 38.7%. All categories of accommodations experienced increases in occupancy rates.
- However, average daily rates continued to suffer. The overall average daily rate dropped from \$120.29 in August 2008 to \$99.8 in August 2009 (-17.0%). ADR decreases were present in hotel/motel properties and condos/vacation homes. RV parks/campgrounds had an increase in ADR over last year.
- The decline in ADR outweighed the increase in average occupancy rates, and as a result, RevPAR was down -7.6% from August 2008. Hotels/motels/resorts and condos/vacation homes experienced decreases in RevPAR (-12.1% and -1.2% respectively) while RV parks/campgrounds experienced an increase (+34.3%).

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2008	2009	% Change	2008	2009	% Change	2008	2009	% Change
Property Managers Responding	149	142		149	149		149/149	142/149	
Hotel/Motel/Resort/B&B	44.6%	44.7%	0.2%	\$119.16	\$104.64	-12.2%	\$53.18	\$46.77	-12.1%
Condo/Cottage/Vacation Home	29.5%	41.3%	40.0%	\$174.32	\$122.77	-29.6%	\$51.40	\$50.76	-1.2%
RV Park/Campground	18.7%	22.4%	19.8%	\$30.59	\$34.26	12.0%	\$5.72	\$7.68	34.3%
AVERAGE	34.8%	38.7%	11.2%	\$120.29	\$99.80	-17.0%	\$41.83	\$38.64	-7.6%



- Property managers in August 2009 were no more negative than they had been in August 2008 when comparing the current month's *occupancy* and *revenue*. More than half reported their *occupancy* was worse than the prior year (61% August 2009 and 58% August 2008). Similarly, nearly two-thirds reported their *revenue* was worse than the prior year (65% August 2009 and 61% August 2008) as a result of reduced rates.
- The projections for the next three months (September through November) are not encouraging either based on reports from property managers. Three in five (57%) said that reservations for the next three months are down. Property managers are particularly pessimistic about international travel over the next three months, with only 10% expecting *more* visitors from Canada (vs. 21% in August 2008) and 8% expecting *more* visitors from Europe (vs. 29% in August 2008).



August 2009 Lee County Snapshot

Total August Visitation				
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<i>Total Visitation</i>			342,933	318,859

Total Visitor Expenditures			
	2008	2009	% Change
Total Visitor Expenditures	\$179,934,230	\$130,153,697	-27.7%
Paid Accommodations	\$97,186,232	\$82,567,769	-15.0%

August Visitor Origin – Visitors Staying in Paid Accommodations				
	%		Visitor Estimates	
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France	2%	1%	2,404	2,658
Scandinavia	--	1%	--	1,454
Austria	1%	1%	1,202	1,329
Switzerland	--	1%	--	1,153
Ireland	2%	--	3,606	--

Average Per Person Per Day Expenditures		
2008	2009	% Change
\$111.25	\$102.13	-8.2%

First-Time/Repeat Visitors to Lee County		
	2008	2009
First-time	35%	34%
Repeat	65%	66%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2008	2009	% Change	2008	2009	% Change	2008	2009	% Change
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Visitor Profile Analysis August 2009

A total of 199 interviews were conducted with visitors in Lee County during the month of August 2009. A total sample of this size is considered accurate to plus or minus 6.9 percentage points at the 95% confidence level.

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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.



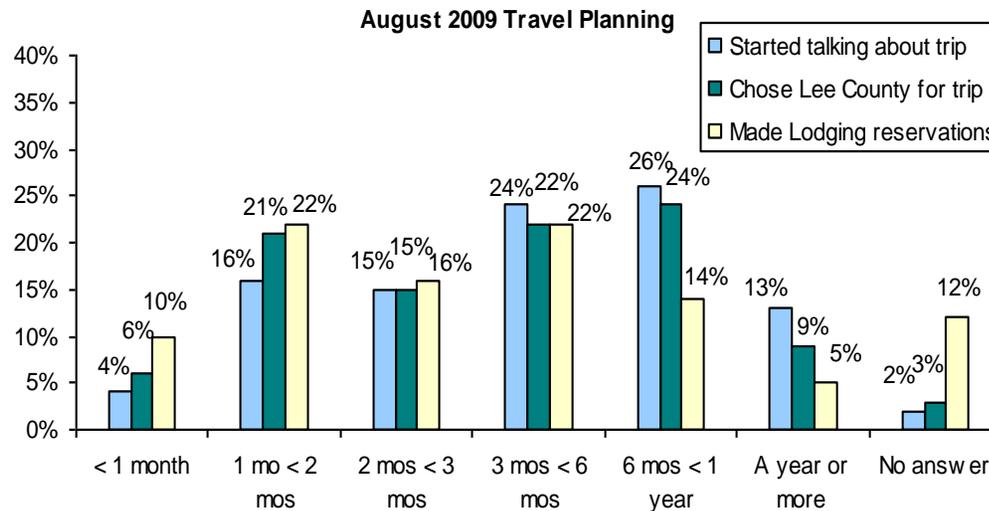
Travel Planning

	Started Talking About Trip		Chose Lee County for Trip		Made Lodging Reservations	
	2008	2009	2008	2009	2008	2009
Total Respondents	199	199	199	199	199	199
< 1 month	8%	4%	<12%>	6%	10%	10%
1 mo - < 2 mos	9%	16%	14%	21%	16%	22%
2 mos - < 3 mos	12%	15%	11%	15%	11%	16%
3 mos - < 6 mos	27%	24%	21%	22%	19%	22%
6 mos - < 1 year	27%	26%	24%	24%	19%	14%
A year or more	13%	13%	11%	9%	7%	5%
No answer	4%	2%	7%	3%	18%	12%

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		
	August	
	2008	2009
Total Respondents	199	199
Before leaving home	81%	86%
After arriving in FL	6%	4%
On the road, but not in FL	--	1%
No answer	13%	9%

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

Computer Access		
	August	
	2008	2009
Total Respondents	199	199
<u>Yes</u>	<u>92%</u>	<u>95%</u>
<i>Home</i>	17%	18%
<i>Work</i>	3%	2%
<i>Both Home and Work</i>	72%	76%
<u>No</u>	<u>6%</u>	<u>5%</u>

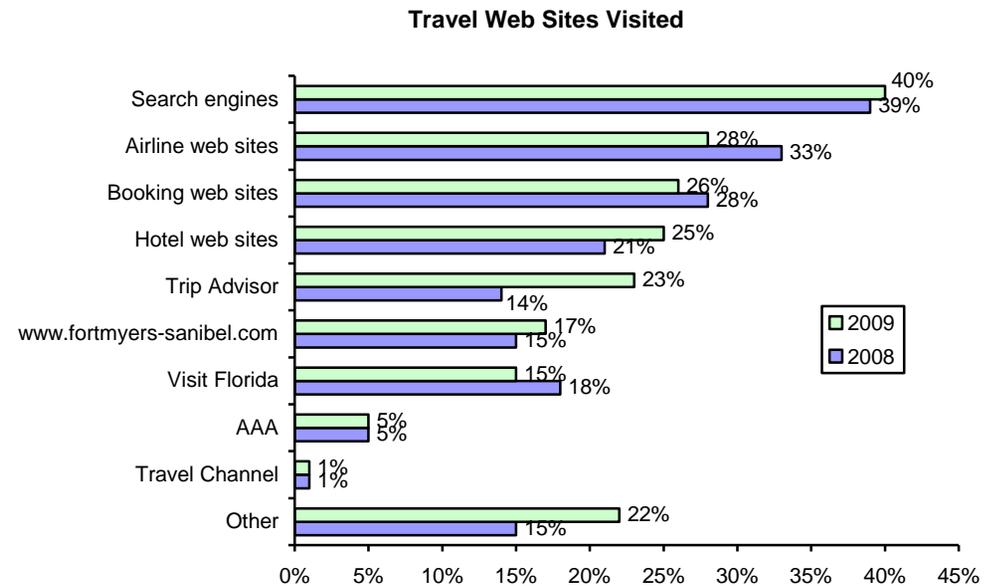
Q8: Do you have access to a computer?



Travel Planning

Travel Web Sites Visited by August Travelers		
	2008	2009
Total Respondents with computer access	182	190
Visited web sites (net)	81%	85%
Search engines	39%	40%
Airline web sites	33%	28%
Booking web sites	28%	26%
Hotel web sites	21%	25%
Trip Advisor	14%	<23%>
www.fortmyers-sanibel.com	15%	17%
Visit Florida	18%	15%
AAA	5%	5%
Travel Channel	1%	1%
Other	15%	22%
Did not visit web sites	15%	13%
No Answer	4%	2%

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



Base: Respondents with Computer Access

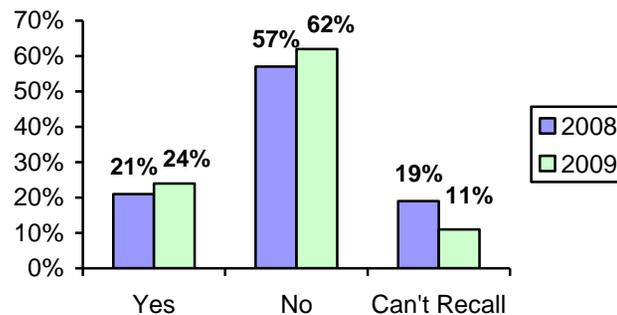


Travel Planning

August Travelers Requesting Information		
	2008	2009
Total Respondents	199	199
Requested Information (net)	40%	42%
Hotel Web Site	12%	17%
VCB Web Site	12%	13%
Call hotel	5%	7%
Visitor Guide	8%	7%
Call local Chamber of Commerce	1%	2%
Clipping/mailling coupon	1%	1%
Receiving e-Newsletter Paradise.com	--	1%
Other	14%	10%
Did not request information	45%	51%
No Answer	15%	7%

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	199
Yes	4%	7%
No	94%	91%

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

Recall of Lee County Promotions		
	2008	2009
Total Respondents	199	199
Yes	21%	24%
No	57%	62%
Can't Recall	<19%>	11%

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

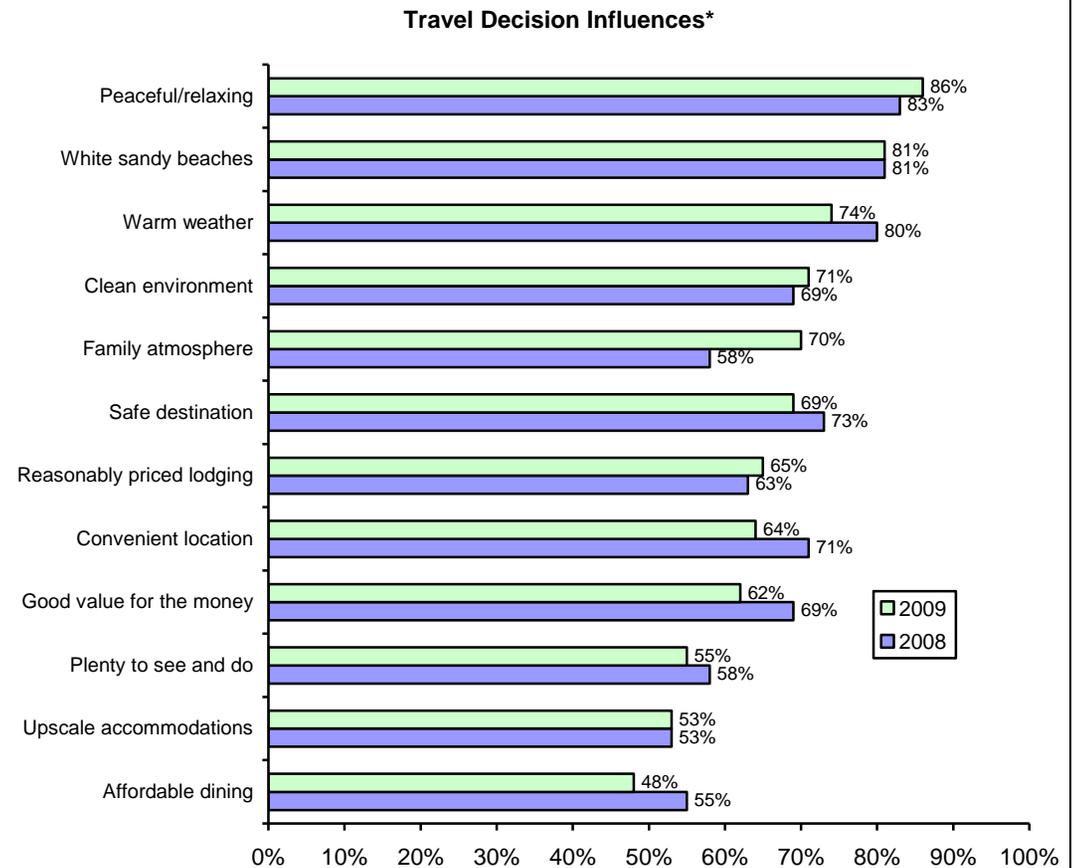


Travel Planning

August Travel Decision Influences*		
	2008	2009
Total Respondents	199	199
Peaceful/Relaxing	83%	86%
White sandy beaches	81%	81%
Warm weather	80%	74%
Clean environment	69%	71%
Family atmosphere	58%	<70%>
Safe destination	73%	69%
Reasonably priced lodging	63%	65%
Convenient location	71%	64%
Good value for the money	69%	62%
Plenty to see and do	58%	55%
Upscale accommodations	53%	53%
Affordable dining	55%	48%

Q14: When you were talking about coming to Lee County, if one (1) is "Not at All Influential" and five (5) is "Definitely Influential," how strongly did the following influence your selection?

* Percentages shown reflect top 2 box scores (rating of 4 or 5)

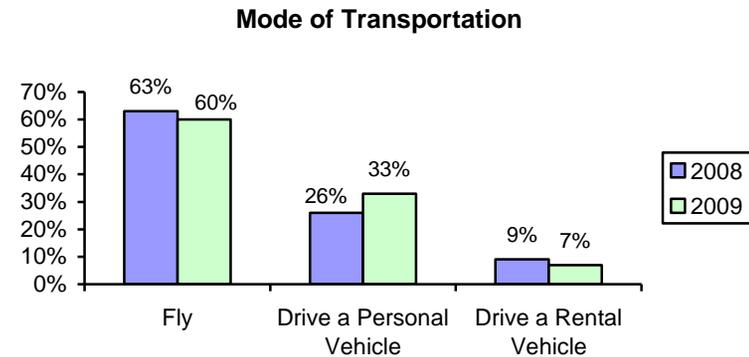




Trip Profile

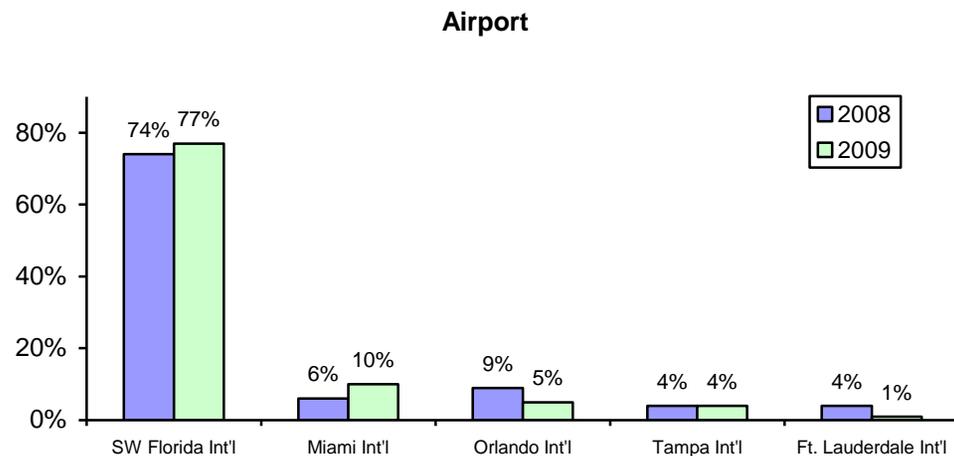
Mode of Transportation		
	2008	2009
Total Respondents	199	199
Fly	63%	60%
Drive a Personal Vehicle	26%	33%
Drive a Rental Vehicle	9%	7%
Drive an RV	1%	--
Other/No answer	1%	1%

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



Airport		
	2008	2009
Total Respondents who Arrived by Air	125	119
SW Florida Int'l	74%	77%
Miami Int'l	6%	10%
Orlando Int'l	9%	5%
Tampa Int'l	4%	4%
Ft. Lauderdale Int'l	4%	1%
Sarasota/Bradenton	--	--
Other/No Answer	2%	3%

Q2: At which Florida airport did you land?

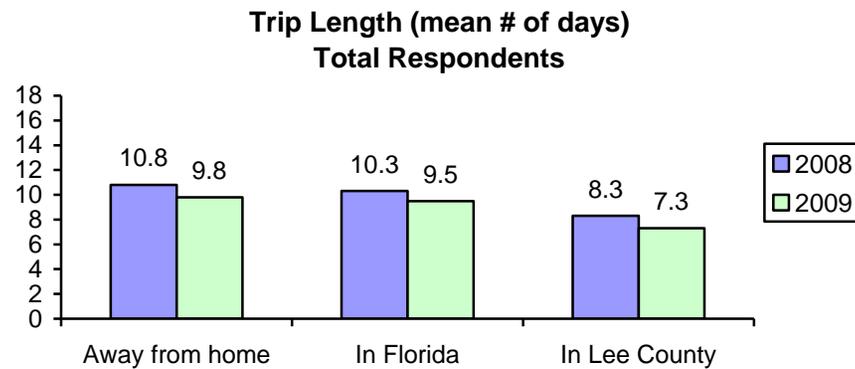




Trip Profile

August Trip Length Mean # of Days			
	Total Respondents		
	2008	2009	% Change
Total Respondents	199	199	
Away from home	10.8	9.8	-9.3%
In Florida	10.3	9.5	-7.8%
In Lee County	8.3	7.3	-12.0%

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





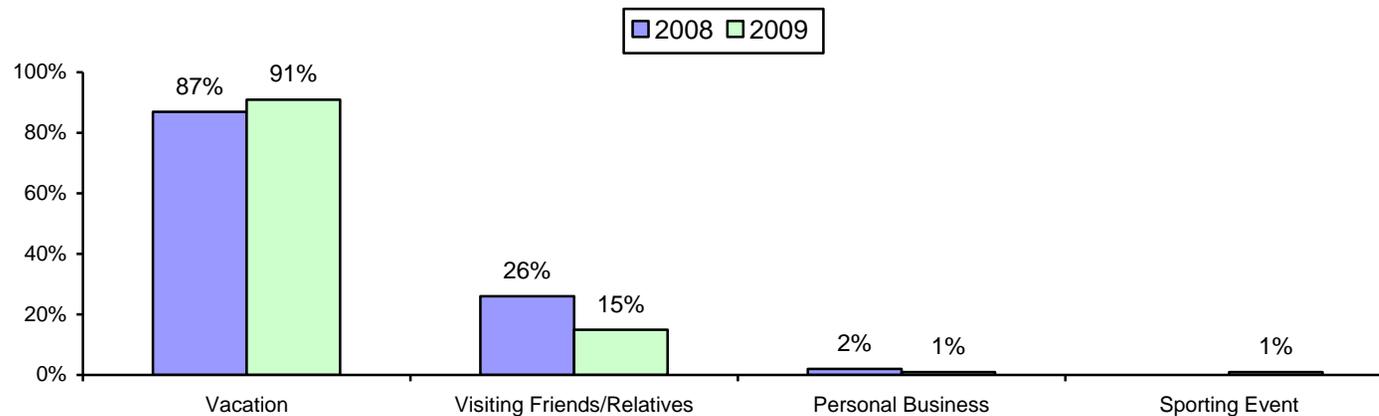
Trip Profile

Reason for August Visit		
	2008	2009
Total Respondents	199	199
Vacation	87%	91%
Visiting Friends/Relatives	<26%>	15%
Personal Business	2%	1%
Sporting Event	--	1%
Convention/Trade Show*	--	1%
Conference/Meeting*	--	--
Other Business Trip*	--	1%
Other/No Answer	4%	3%

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 August Visit





Trip Profile

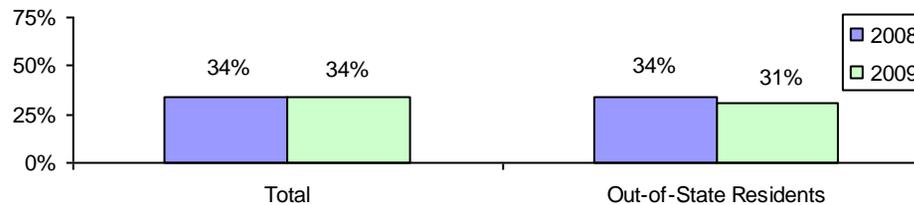
First Time Visitors to Lee County								
	Total		Florida Residents		Out-of-State Residents		International Visitors	
	2008	2009	2008	2009	2008	2009	2008	2009
Total Respondents	199	199	23**	39**	93*	104	62*	46**
Yes	34%	34%	N/A	N/A	34%	31%	45%	N/A
No	65%	66%	N/A	N/A	65%	69%	55%	N/A
No answer	1%	1%	N/A	N/A	1%	--	--	N/A

Q20: Is this your first visit to Lee County?

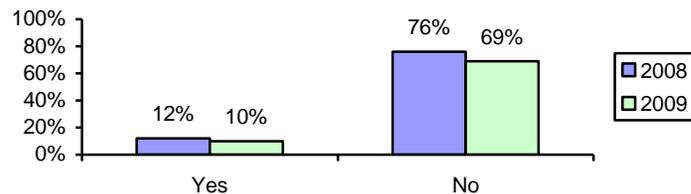
*Note: Small sample size. Please interpret results with caution.

**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	199
Yes	12%	10%
No	76%	69%
No Answer	1%	1%
FL Residents*	11%	<20%>

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.



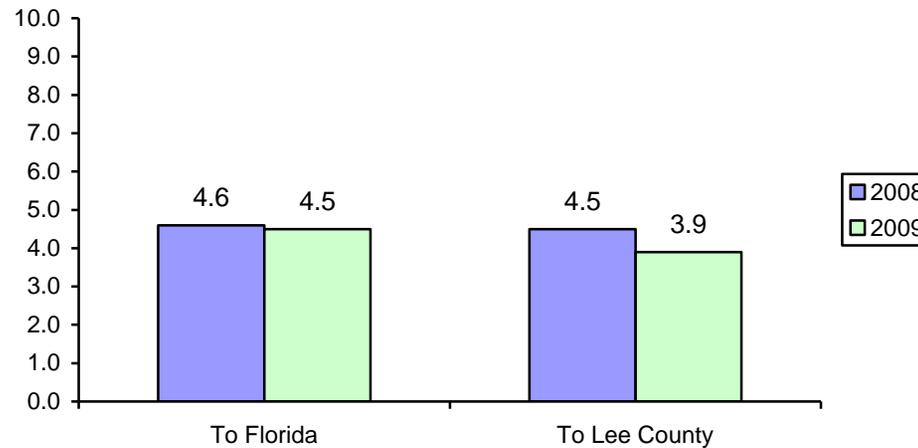
Trip Profile

Previous Visits in Five Years				
	Mean # of Visits To Florida		Mean # of Visits To Lee County	
	2008	2009	2008	2009
Base: Repeat Visitors	152 (FL res. Excl.)	137 (FL res. Excl.)	130	130
Number of visits	4.6	4.5	4.5	3.9

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



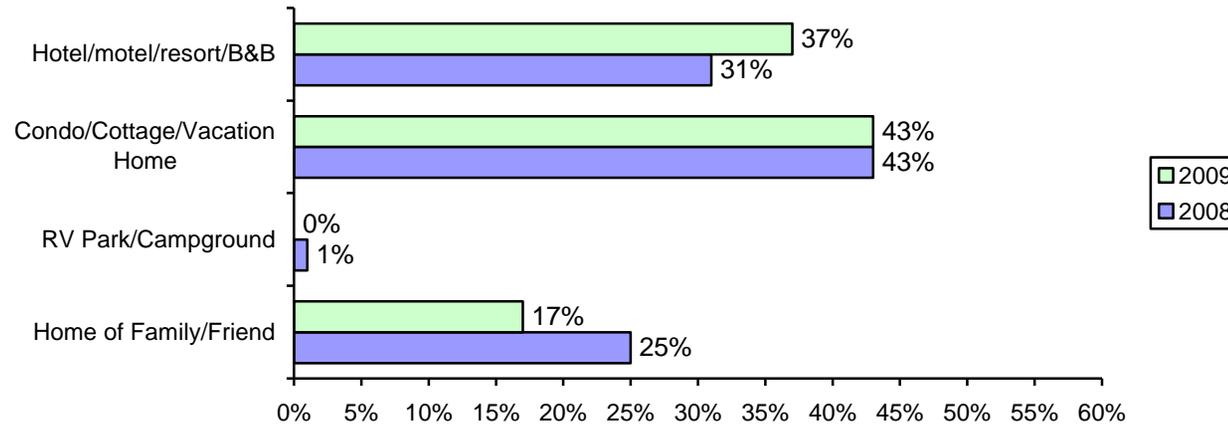


Trip Profile

Type of Accommodations – August Visitors		
	2008	2009
Total Respondents	199	199
Hotel/Motel/Resort/B&B	31%	37%
Hotel/motel/inn	21%	21%
Resort	10%	16%
B&B	1%	<1%
Condo/Cottage/Vacation Home	43%	43%
Rented home/condo	29%	34%
Borrowed home/condo	6%	6%
Owned home/condo	8%	4%
RV Park/Campground	1%	--
Home of family/friend	25%	17%
Day trip (no accommodations)	--	2%

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

Type of Accommodations - August Visitors



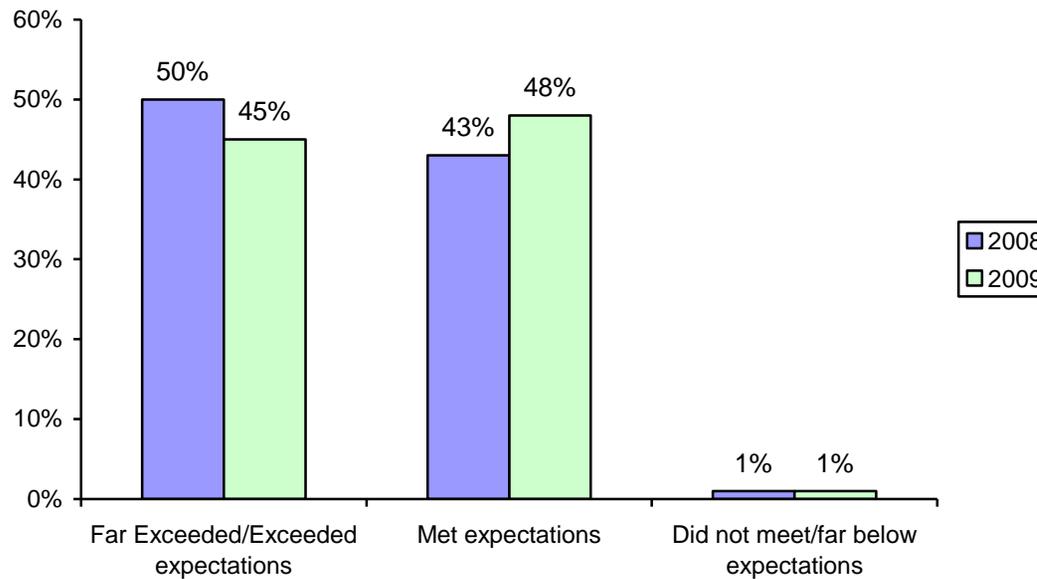


Trip Profile

Quality of Accommodations		
	2008	2009
Total Respondents	199	199
Far exceeded/Exceeded expectations	50%	45%
Met expectations	43%	48%
Did not meet/Far below expectations	1%	1%
No Answer	6%	5%

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

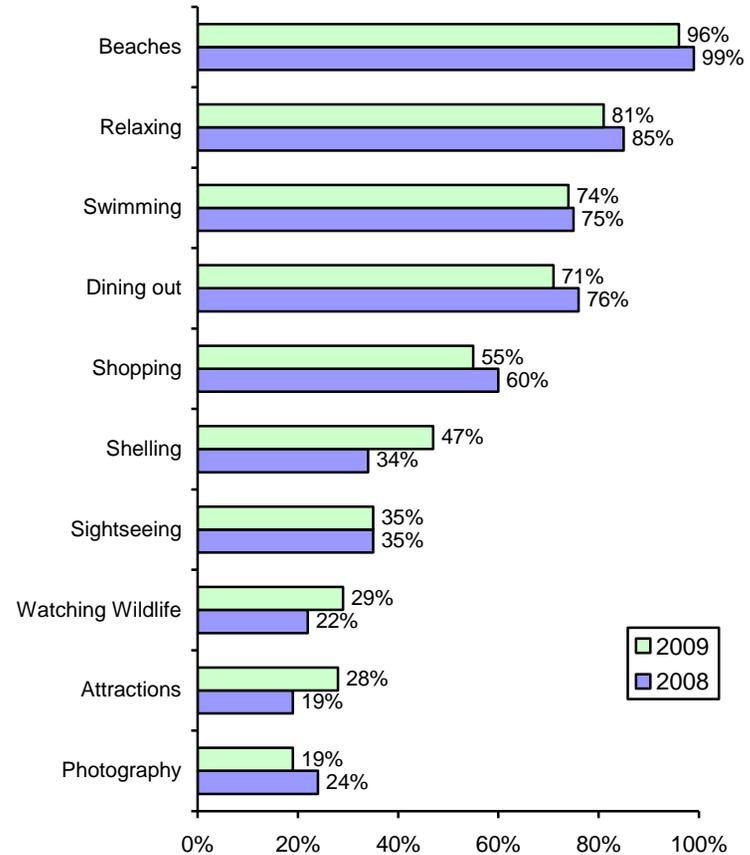
Quality of Accommodations





Trip Activities

August Activities Enjoyed		
	2008	2009
Total Respondents	199	199
Beaches	99%	96%
Relaxing	85%	81%
Swimming	75%	74%
Dining out	76%	71%
Shopping	60%	55%
Shelling	34%	<47%>
Sightseeing	35%	35%
Watching Wildlife	22%	29%
Attractions	19%	<28%>
Photography	24%	19%
Visiting Friends/Relatives	<30%>	18%
Bicycle Riding	16%	17%
Bars/Nightlife	<28%>	16%
Birdwatching	12%	15%
Fishing	16%	15%
Exercise/Working Out	13%	13%
Miniature Golf	15%	13%
Boating	14%	12%
Parasailing/Jet Skiing	12%	12%
Golfing	12%	7%
Guided Tour	4%	6%
Kayaking/Canoeing	7%	6%
Tennis	2%	4%
Scuba Diving/Snorkeling	4%	3%
Cultural Events	4%	2%
Sporting Event	3%	1%
Other	3%	1%

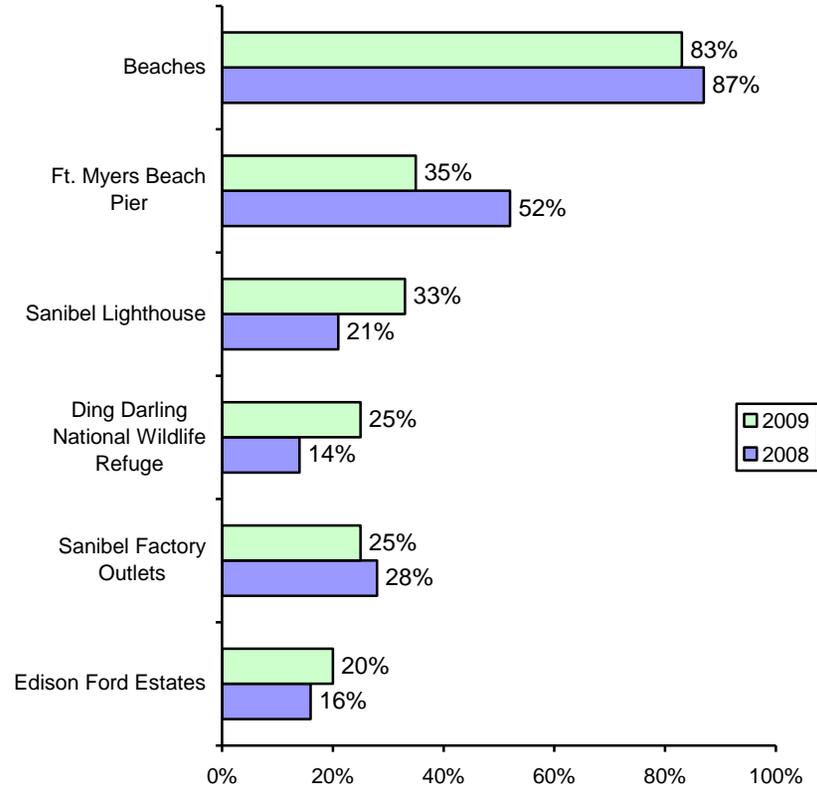


Q28: What activities or interests are you enjoying while in Lee County?
(Please mark ALL that apply.)



Trip Activities

August Attractions Visited		
	2008	2009
Total Respondents	199	199
Beaches	87%	83%
Ft. Myers Beach Pier	<52%>	35%
Sanibel Lighthouse	21%	<33%>
Ding Darling National Wildlife Refuge	14%	<25%>
Sanibel Factory Outlets	28%	25%
Edison Ford Estates	16%	20%
Periwinkle Place	12%	18%
Miromar Outlet Mall	<27%>	16%
Coconut Point Mall	13%	9%
Edison Mall	<22%>	8%
Bailey-Matthews Shell Museum	3%	7%
Shell Factory and Nature Park	10%	7%
Bell Tower Shops	<16%>	5%
Gulf Coast Town Center	9%	5%
Manatee Park	4%	4%
Broadway Palm Dinner Theater	3%	1%
Other	3%	<9%>
None/No Answer	5%	3%



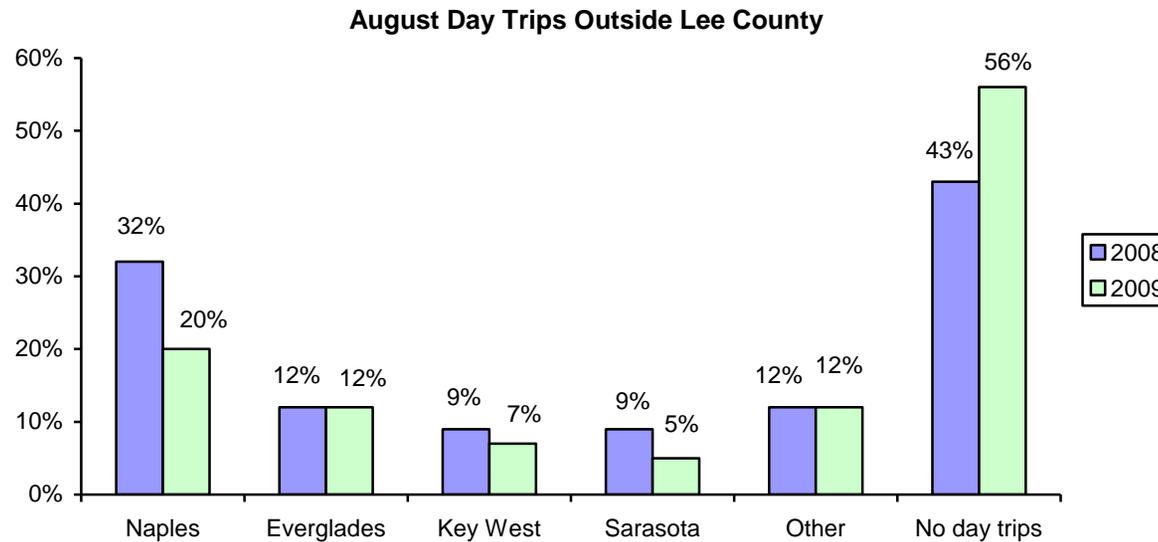
Q29: On this trip, which attractions are you visiting?
(Please mark ALL that apply.)



Trip Activities

August Day Trips Outside Lee County		
	2008	2009
Total Respondents	199	199
Any Day Trips (net)	<49%>	38%
<i>Naples</i>	<32%>	20%
<i>Everglades</i>	12%	12%
<i>Key West</i>	9%	7%
<i>Sarasota</i>	9%	5%
<i>Other</i>	12%	12%
No day trips	43%	<56%>
No answer	7%	6%

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



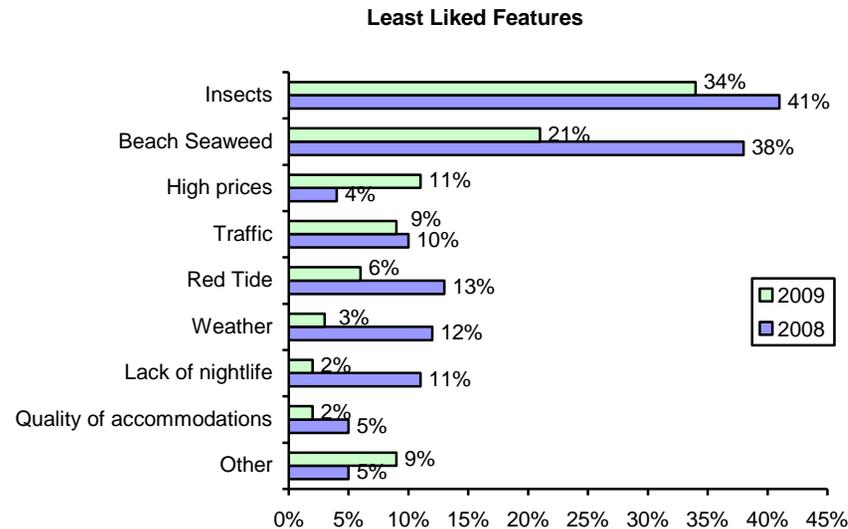


Lee County Experience

Least Liked Features		
	2008	2009
Total Respondents	199	199
Insects	41%	34%
Beach seaweed	<38%>	21%
High prices	4%	<11%>
Traffic	10%	9%
Red Tide	<13%>	6%
Weather	<12%>	3%
Lack of nightlife	<11%>	2%
Quality of accommodations	5%	2%
Other	5%	9%
Nothing/no answer	20%	<35%>

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

Note: Revised question wording introduced in July 2009.



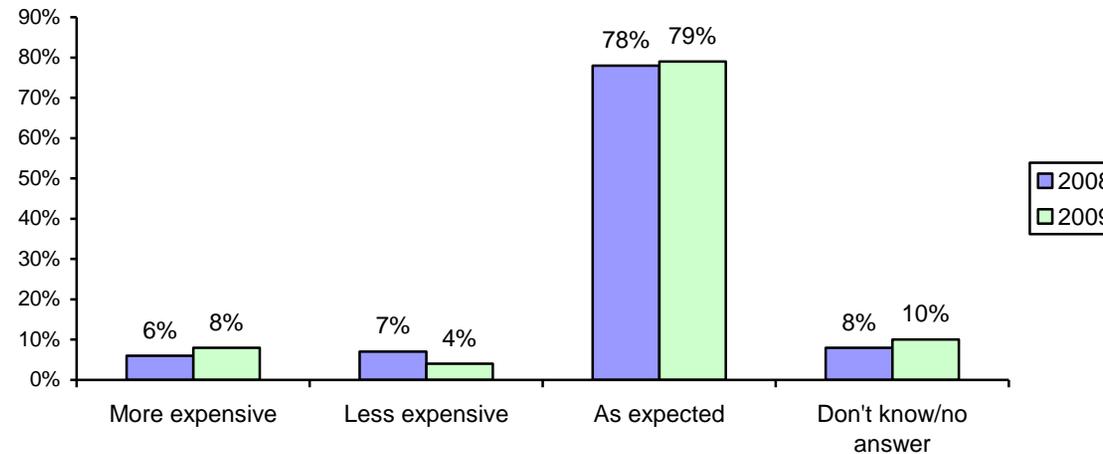


Lee County Experience

Perception of Lee County as Expensive		
	2008	2009
Total Respondents	199	199
More expensive	6%	8%
Less expensive	7%	4%
As expected	78%	79%
Don't know/no answer	8%	10%

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

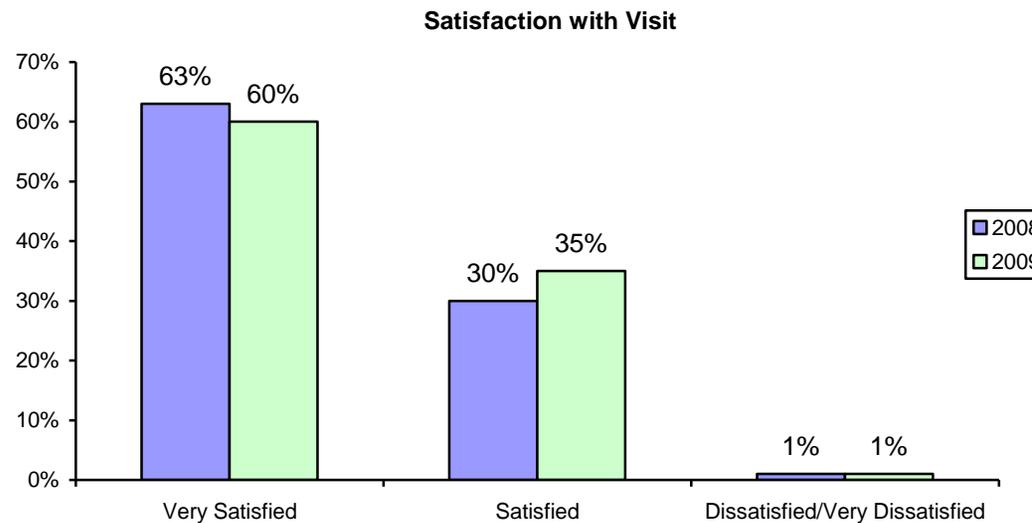




Lee County Experience

Satisfaction with Visit		
	2008	2009
Total Respondents	199	199
<u>Satisfied</u>	93%	95%
<i>Very Satisfied</i>	63%	60%
<i>Satisfied</i>	30%	35%
Neither	2%	1%
Dissatisfied/Very Dissatisfied	1%	1%
Don't know/no answer	4%	3%

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





Future Plans

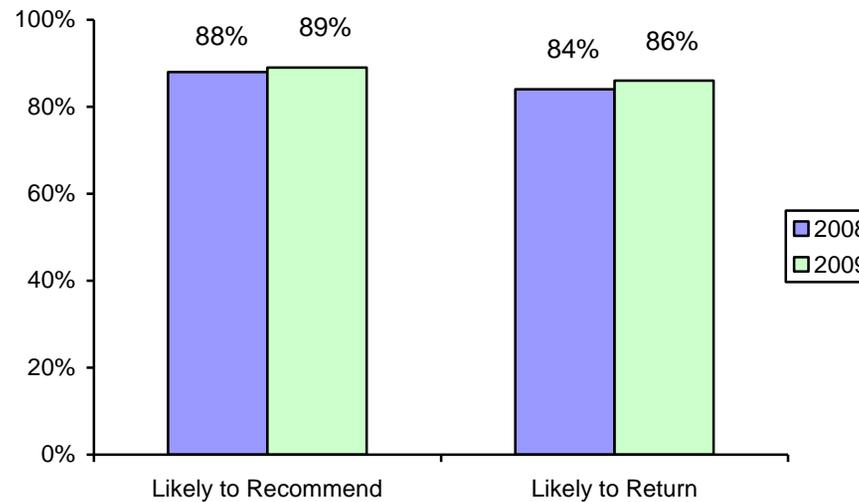
Likelihood to Recommend/Return to Lee County		
	2008	2009
Total Respondents	199	199
Likely to Recommend Lee County	88%	89%
Likely to Return to Lee County	84%	86%
Base: Total Respondents Planning to Return	167	171
Likely to Return Next Year	56%	51%

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")**

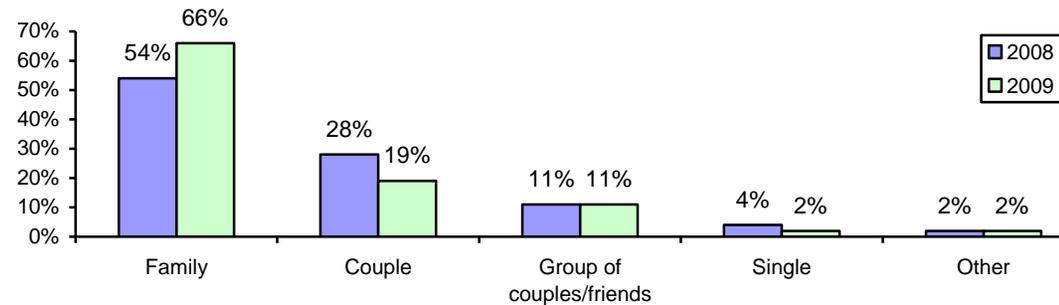




Visitor and Travel Party Demographic Profile

August Travel Party		
	2008	2009
Total Respondents	199	199
Family	54%	<66%>
Couple	<28%>	19%
Group of couples/friends	11%	11%
Single	4%	2%
Other	2%	2%
Mean travel party size	3.5	<4.0>
Mean adults in travel party	2.8	2.7

Travel Party



Travel Parties with Children		
	2008	2009
Total Respondents	199	199
Traveling with any Children (net)	39%	<60%>
Any younger than 6	17%	23%
Any 6 – 11 years old	17%	<35%>
Any 12 – 17 years old	18%	<33%>

Q22: On this trip, are you traveling:

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

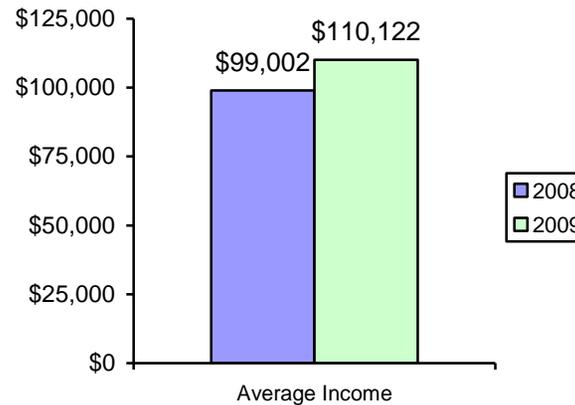
Q24: How many of those people are: Younger than 6 years old/6-11 years old/12-17 years old/Adults



Visitor and Travel Party Demographic Profile

August Visitor Demographic Profile		
	2008	2009
Total Respondents	199	199
Vacations per year (mean)	2.7	2.8
Short getaways per year (mean)	3.2	3.4
Age of respondent (mean)	43.8	<47.0>
Annual household income (mean)	\$99,002	<\$110,122>
Marital Status		
Married	67%	<76%>
Single	<19%>	10%
Other	12%	13%

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 August Visitation					
	%		Visitor Estimates		% Change
	2008	2009	2008	2009	2008-2009
Paid Accommodations	43%	61%	147,856	194,292	31.4%
Friends/Relatives	57%	39%	195,077	124,567	-36.1%
<i>Total Visitation</i>			342,933	318,859	-7.0%
August Visitor Origin – Visitors Staying in Paid Accommodations					
	2008	2009	2008	2009	
United States	62%	76%	91,358	147,625	61.6%
Germany	11%	9%	16,829	17,062	1.4%
United Kingdom	15%	7%	22,840	14,354	-37.2%
BeNeLux	4%	3%	6,010	5,692	-5.3%
Canada	2%	2%	3,606	2,965	-17.8%
France	2%	1%	2,404	2,658	10.6%
Scandinavia	--	1%	--	1,454	--
Austria	1%	1%	1,202	1,329	10.6%
Switzerland	--	1%	--	1,153	--
Ireland	2%	--	3,606	--	--
U.S. Region (Paid Accommodations)					
	2008	2009	2008	2009	
Florida	25%	28%	22,840	41,693	82.5%
South (including Florida)	46%	46%	42,073	68,184	62.1%
Midwest	29%	29%	26,446	43,024	62.7%
Northeast	8%	16%	7,212	23,716	228.8%
West	1%	4%	1,202	5,441	352.7%
No Answer	16%	5%	14,425	7,260	-49.7%

2009 Top DMAs (Paid Accommodations)		
Miami-Fort Lauderdale	13%	19,369
Tampa-Saint Petersburg (Sarasota)	9%	12,883
New York	8%	12,463
Indianapolis	5%	7,317
Washington, DC (Hagerstown)	4%	6,045
Cleveland-Akron (Canton)	4%	5,504
West Palm Beach-Fort Pierce	4%	5,447
Philadelphia	3%	3,987



Occupancy Data Analysis August 2009

Property managers representing 155 properties in Lee County were interviewed for the August 2009 Occupancy Survey between August 1 and August 15, 2009, a sample considered accurate to plus or minus 7.9 percentage points at the 95% confidence level.

Property managers representing 153 properties in Lee County were interviewed for the August 2008 Occupancy Survey between September 1 and September 15, 2008, a sample considered accurate to plus or minus 7.9 percentage points at the 95% confidence level.



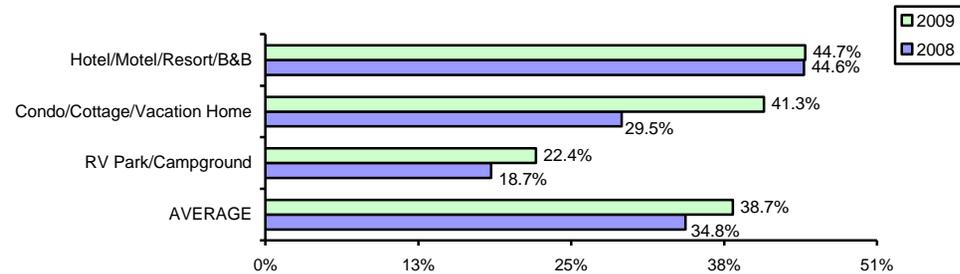
August Occupancy/Daily Rates

	Average Occupancy Rate - %			Average Daily Rate - \$			RevPAR - \$		
	2008	2009	% Change	2008	2009	% Change	2008	2009	% Change
Property Managers Responding	149	142		149	149		149/149	142/149	
Hotel/Motel/Resort/B&B	44.6%	44.7%	0.2%	\$119.16	\$104.64	-12.2%	\$53.18	\$46.77	-12.1%
Condo/Cottage/Vacation Home	29.5%	41.3%	40.0%	\$174.32	\$122.77	-29.6%	\$51.40	\$50.76	-1.2%
RV Park/Campground	18.7%	22.4%	19.8%	\$30.59	\$34.26	12.0%	\$5.72	\$7.68	34.3%
AVERAGE	34.8%	38.7%	11.2%	\$120.29	\$99.80	-17.0%	\$41.83	\$38.64	-7.6%

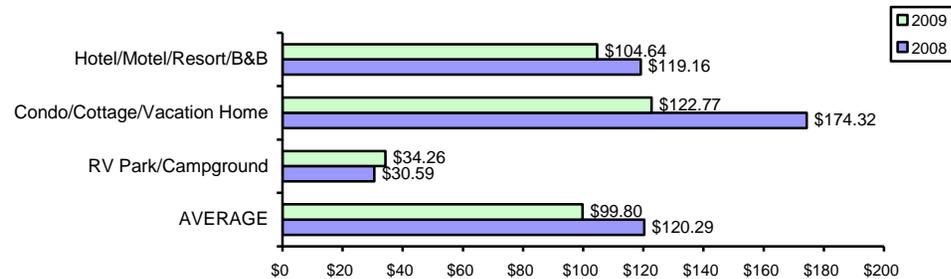
Q16: What was your overall average occupancy rate for the month of August?

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

Average Occupancy Rate



Average Daily Rate

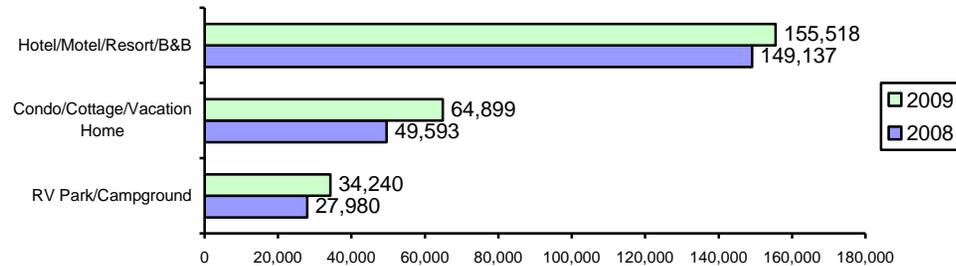




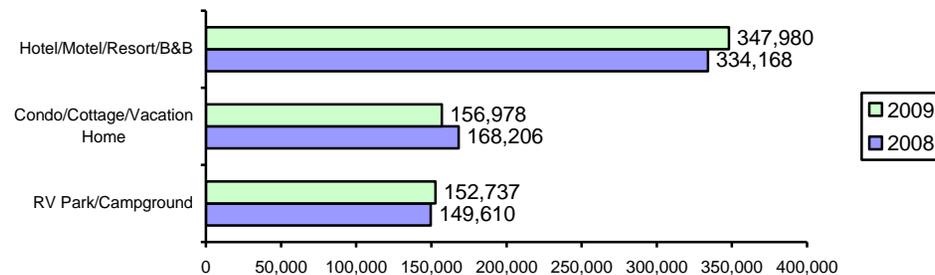
August Room/Unit/Site Nights

	Occupied Room Nights			Available Room Nights		
	2008	2009	% Change	2008	2009	% Change
Hotel/Motel/Resort/B&B	149,137	155,518	4.0%	334,168	347,980	4.1%
Condo/Cottage/Vacation Home	49,593	64,899	30.9%	168,206	156,978	-6.7%
RV Park/Campground	27,980	34,240	22.4%	149,610	152,737	2.1%
Total	226,710	254,657	12.3%	651,984	657,695	0.9%

Occupied Room Nights



Available Room Nights



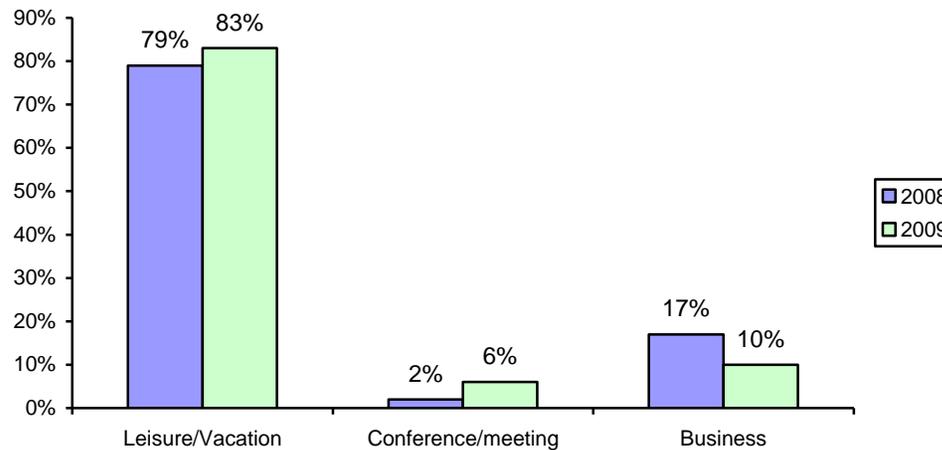


Lodging Management Estimates

August Guest Profile		
	2008	2009
Property Managers Responding	121	129
Purpose of Visit		
Leisure/Vacation	79%	83%
Conference/meeting	2%	<6%>
Business	<17%>	10%
Property Managers Responding	142	139
Average guests per room	2.4	<2.7>
Property Managers Responding	141	138
Average length of stay in nights	5.6	5.2

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

Purpose of Visit



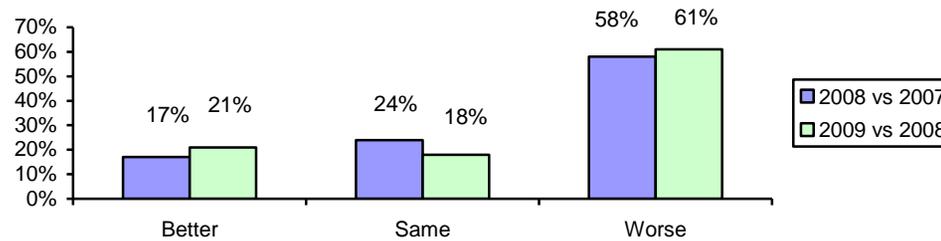


Occupancy Barometer

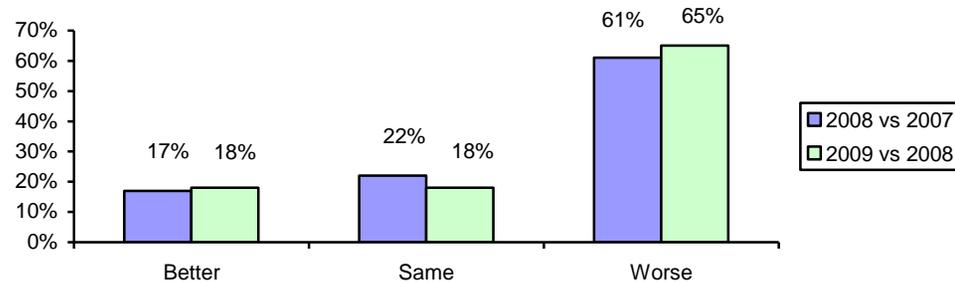
	August Occupancy		August Revenue	
	2008	2009	2008	2009
Property Managers Responding	143	141	140	136
Better than prior year	17%	21%	17%	18%
Same as prior year	24%	18%	22%	18%
Worse than prior year	58%	61%	61%	65%

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

August Occupancy



August Revenue



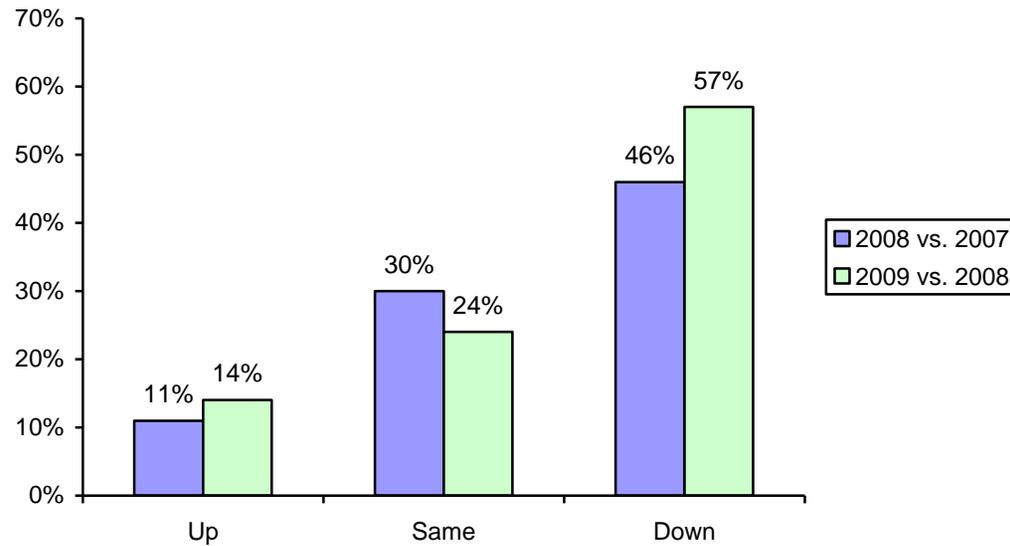


Occupancy Barometer

Level of Reservations for Next 3 Months Compared to Last Year		
	2008	2009
Property Managers Responding	144	144
Up	11%	14%
Same	30%	24%
Down	46%	57%

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

Level of Reservations for Next 3 Months Compared to Last Year



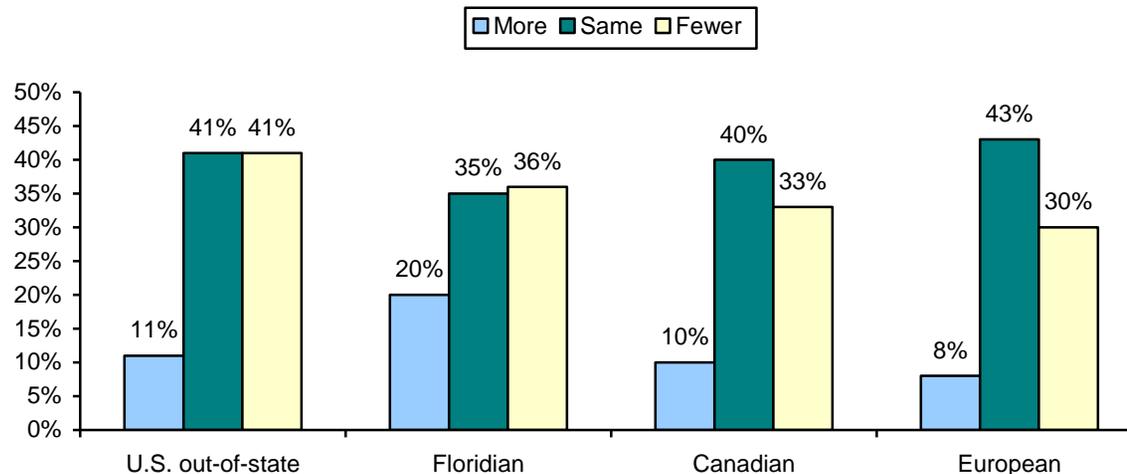


Occupancy Barometer

Origin of Guests for Next 3 Months Compared to Last Year								
Property Managers Responding (122/94 Minimum)	More		Same		Fewer		Not Applicable	
	2008	2009	2008	2009	2008	2009	2008	2009
U.S. out-of-state	12%	11%	40%	41%	42%	41%	6%	6%
Floridian	21%	20%	<48%>	35%	27%	36%	5%	9%
Canadian	<21%>	10%	34%	40%	31%	33%	14%	18%
European	<29%>	8%	31%	43%	26%	30%	15%	18%

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



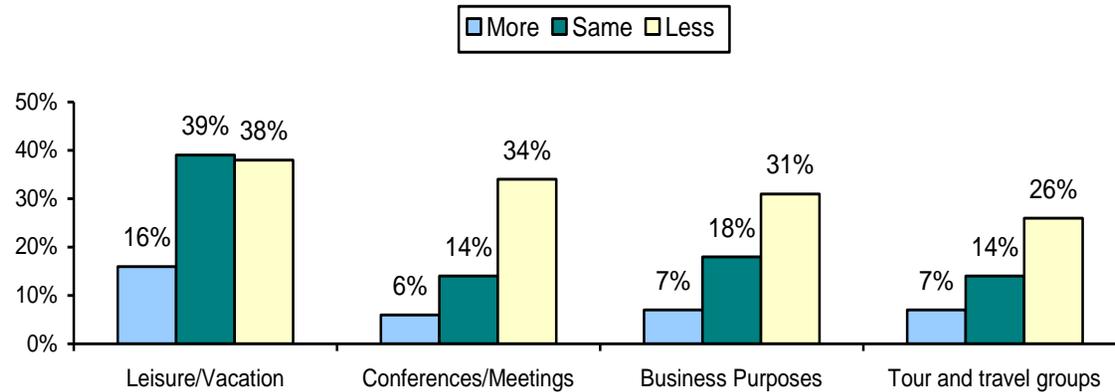


Occupancy Barometer

Type of Travelers for Next 3 Months Compared to Last Year								
Property Managers Responding (84/118 Minimum)	More		Same		Less		Not Applicable	
	2008	2009	2008	2009	2008	2009	2008	2009
Leisure/vacation	18%	16%	45%	39%	30%	38%	7%	7%
Conferences/Meetings	4%	6%	<27%>	14%	29%	34%	39%	47%
Business Purposes	5%	7%	<33%>	18%	31%	31%	30%	<43%>
Tour and travel groups	4%	7%	<25%>	14%	24%	26%	48%	53%

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

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





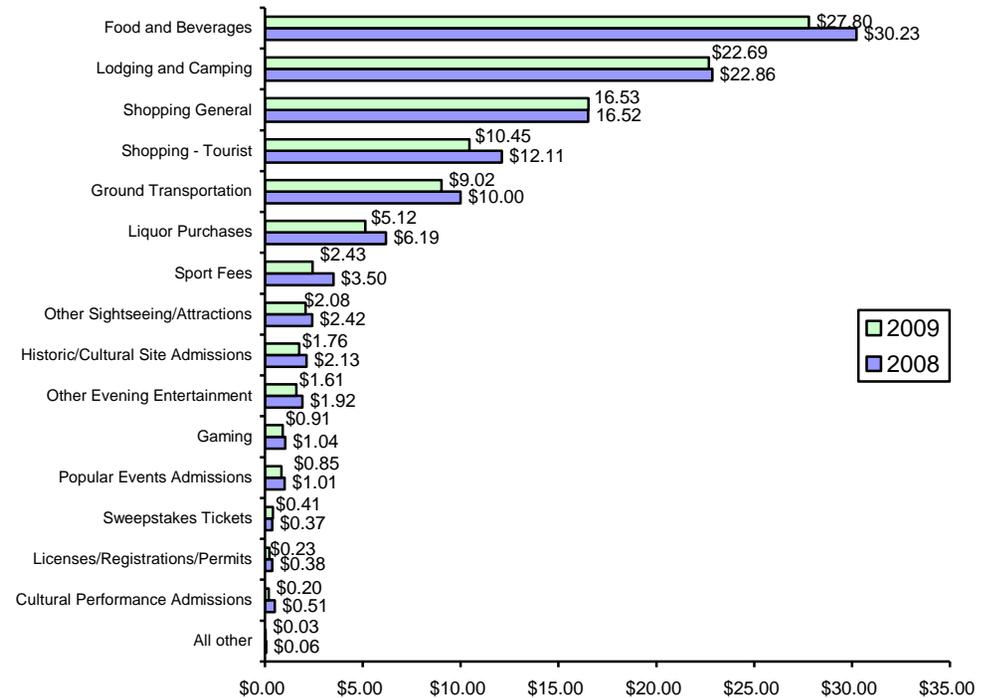
Economic Impact Analysis August 2009



Average Expenditures

August Average Expenditures per Person per Day			
	2008	2009	% Change
TOTAL	\$111.25	\$102.13	-8.2%
Food and Beverages	\$30.23	\$27.80	-8.0%
Lodging Accommodations	\$22.86	\$22.69	-0.7%
Shopping General	\$16.52	\$16.53	0.1%
Shopping - Tourist	\$12.11	\$10.45	-13.7%
Ground Transportation	\$10.00	\$9.02	-9.8%
Liquor Purchases	\$6.19	\$5.12	-17.3%
Sport Fees	\$3.50	\$2.43	-30.6%
Other Sightseeing/Attractions	\$2.42	\$2.08	-14.0%
Historic/Cultural Site Admissions	\$2.13	\$1.76	-17.4%
Other Evening Entertainment	\$1.92	\$1.61	-16.1%
Gaming	\$1.04	\$0.91	-12.5%
Popular Events Admissions	\$1.01	\$0.85	-15.8%
Sweepstakes Tickets	\$0.37	\$0.41	10.8%
Licenses/Registrations/Permits	\$0.38	\$0.23	-39.5%
Cultural Performance Admissions	\$0.51	\$0.20	-60.8%
All other	\$0.06	\$0.03	-50.0%

Average Expenditures per Person per Day

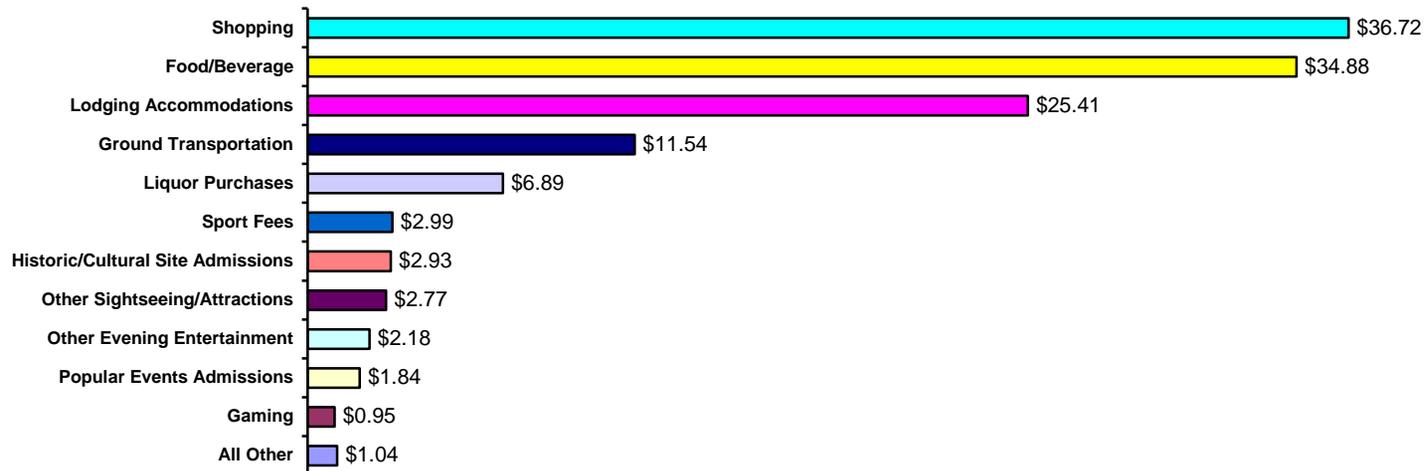




Total Visitor Expenditures by Spending Category

	AUGUST TOTAL EXPENDITURES		
	2008	2009	% Change
TOTAL	\$179,934,230	\$130,153,697	-27.7%
Shopping	\$50,116,191	\$36,722,606	-26.7%
Food and Beverages	\$49,346,856	\$34,882,994	-29.3%
Lodging Accommodations	\$27,271,709	\$25,414,921	-6.8%
Ground Transportation	\$18,627,562	\$11,540,620	-38.0%
Liquor Purchases	\$10,154,555	\$6,889,790	-32.2%
Sport Fees	\$4,135,965	\$2,993,292	-27.6%
Historic/Cultural Site Admissions	\$4,969,148	\$2,934,990	-40.9%
Other Sightseeing/Attractions	\$4,021,867	\$2,773,469	-31.0%
Other Evening Entertainment	\$4,216,805	\$2,177,887	-48.4%
Popular Events Admissions	\$2,746,711	\$1,839,201	-33.0%
Gaming	\$2,302,073	\$945,587	-58.9%
All Other	\$2,024,788	\$1,038,340	-48.7%

August 2009 Total Expenditures
(Millions)





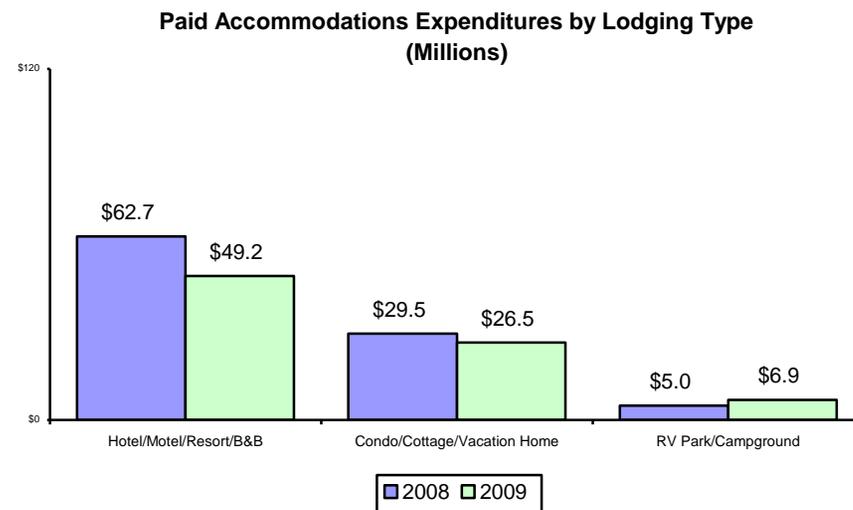
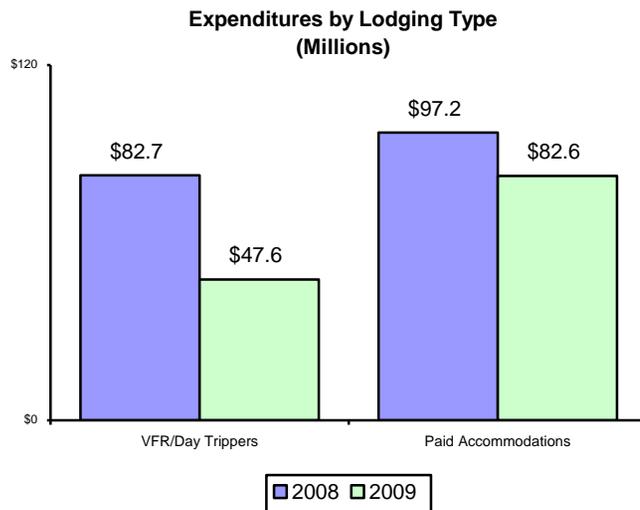
Total Visitor Expenditures by Spending Category

	ALL PROPERTIES					
	Staying in Paid Accommodations			Visiting Friends and Relatives/ Day Trippers		
	2008	2009	% Change	2008	2009	% Change
TOTAL	\$97,186,232	\$82,567,769	-15.0%	\$82,747,998	\$47,585,928	-42.5%
Lodging Accommodations	\$27,271,709	\$25,414,921	-6.8%	\$0	\$0	--
Food and Beverages	\$22,761,379	\$20,319,544	-10.7%	\$26,585,477	\$14,563,450	-45.2%
Shopping	\$23,137,484	\$20,295,723	-12.3%	\$26,978,707	\$16,426,883	-39.1%
Ground Transportation	\$7,147,731	\$6,040,052	-15.5%	\$11,479,831	\$5,500,568	-52.1%
Liquor Purchases	\$4,852,596	\$3,337,304	-31.2%	\$5,301,959	\$3,552,486	-33.0%
Sport Fees	\$3,238,859	\$2,115,222	-34.7%	\$897,106	\$878,070	-2.1%
Other Sightseeing/Attractions	\$2,291,168	\$1,411,699	-38.4%	\$2,703,685	\$1,361,770	-49.6%
Historic/Cultural Site Admissions	\$1,184,620	\$1,236,506	4.4%	\$1,730,699	\$1,698,484	-1.9%
Other Evening Entertainment	\$1,513,120	\$878,947	-41.9%	\$3,784,528	\$1,298,940	-65.7%
Gaming	\$1,808,286	\$579,940	-67.9%	\$493,787	\$365,647	-26.0%
Popular Events Admissions	\$854,642	\$447,575	-47.6%	\$1,892,069	\$1,391,626	-26.4%
All Other	\$1,124,638	\$490,336	-56.4%	\$900,150	\$548,004	-39.1%



Total Visitor Expenditures by Lodging Type

August Total Expenditures by Lodging Type					
	2008	2009	% Change	2008	2009
TOTAL	\$179,934,230	\$130,153,697	-27.7%	100%	100%
Visiting Friends & Relatives/Day Trippers	\$82,747,998	\$47,585,928	-42.5%	46%	37%
Paid Accommodations	\$97,186,232	\$82,567,769	-15.0%	54%	63%
<i>Hotel/Motel/Resort/B&B</i>	\$62,748,974	\$49,225,492	-21.6%	35%	38%
<i>Condo/Cottage/Vacation Home</i>	\$29,486,933	\$26,469,292	-10.2%	16%	20%
<i>RV Park/Campground</i>	\$4,950,325	\$6,872,981	38.8%	3%	5%





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.



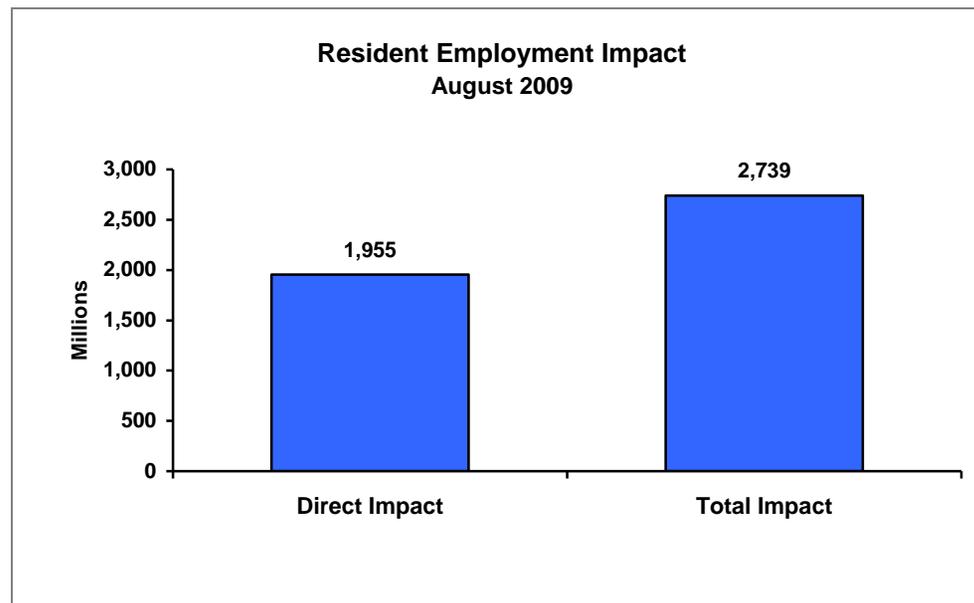
Impact on Jobs for Lee County Residents

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.).





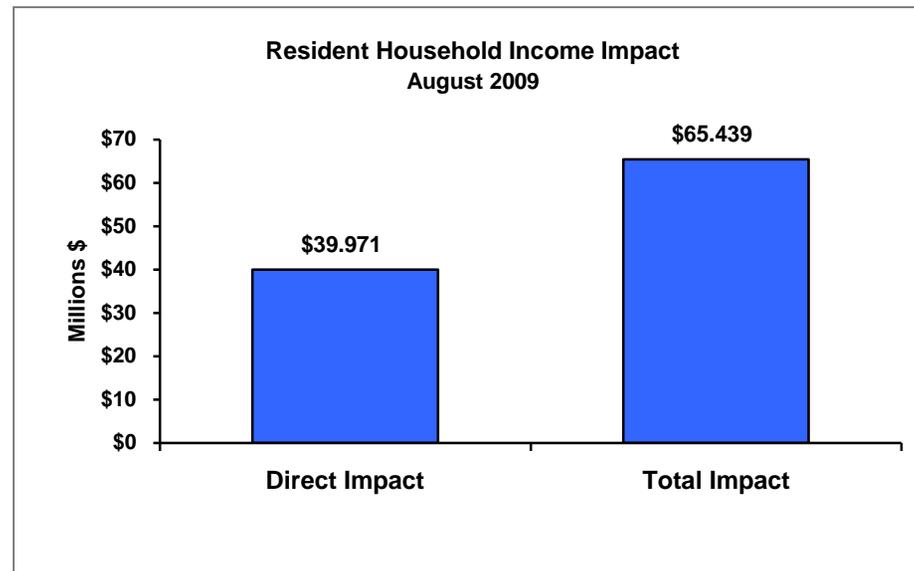
Impact on Household Income for Lee County Residents

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.

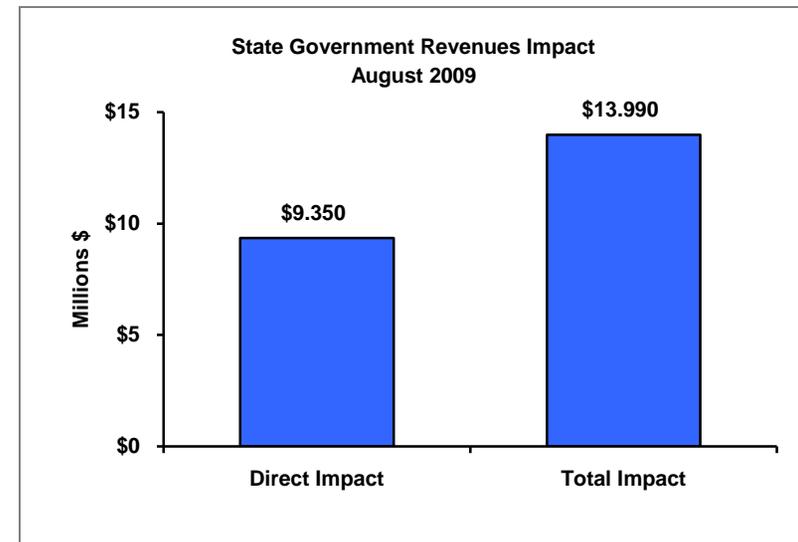
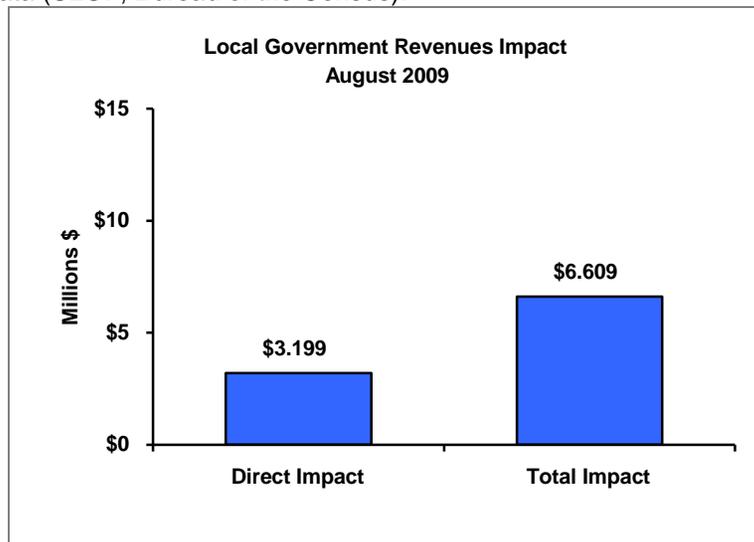
The gross government revenues accruing to governments as a result of producing the output purchased with visitor expenditures is the government revenue impact.

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 August 2009



August 2009 Interviewing Statistics

Visitor Profile Interviewing Statistics			
City	Event/Location	Interviewing Dates	Number of Interviews*
Fort Myers Beach	Neptune Inn	1-Aug	5
Fort Myers Beach	Sandcastle	1-Aug	3
Fort Myers Beach	Diamond Head Resort	1-Aug	9
Fort Myers Beach	The Pier	4-Aug	27
Sanibel	Pointe Santo	6-Aug	15
Sanibel	Ocean Reach	6-Aug	15
Fort Myers	Edison Home	13-Aug	24
Sanibel	Casa Ybel	12-Aug	5
Sanibel	Ding Darling Wildlife Preserve	12-Aug	10
Sanibel	Island Beach Club	12-Aug	6
Sanibel	Sanibel Cottage	12-Aug	4
Cape Coral	Cape Coral Yacht Club Beach	15-Aug	10
Fort Myers	Centennial Park	21-Aug	7
Fort Myers	Hilton Garden Inn	21-Aug	4
Fort Myers	Shell Factory	21-Aug	6
Bonita Springs	Bonita Beach	22-Aug	22
Fort Myers	Best Western	27-Aug	6
Fort Myers Beach	Pink Shell Resort	27-Aug	11
Fort Myers Beach	Summerlin Square Trolley	27-Aug	10
TOTAL			199

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



Occupancy Interviewing Statistics

Interviews were conducted from August 1 – August 27, 2009. Information was provided by 155 Lee County lodging properties.

August 2009

Lodging Type	Number of Interviews
Hotel/Motel/Resort/B&B	94
Condo/Cottage/Vacation Home/Timeshare	43
RV Park/Campground	<u>18</u>
Total	155