



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 2010 Visitor Profile and Occupancy Analysis
October 8, 2010**

Prepared for:

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

Prepared by:



providing direction in travel & tourism



providing direction in travel & tourism



Executive Summary August 2010

Throughout this report, statistically significant differences between percentages for 2009 and 2010 using a confidence level of 95% are noted by <>.



Executive Summary

Visitor Estimates

- Lee County hosted about 175,000 visitors staying in paid accommodations during the month of August 2010, and approximately 216,000 staying with friends or relatives while visiting the County, for a total of 391,129 visitors.
- Similar to the pattern seen in July, the number of August 2010 visitors staying in paid accommodations was 9.9% lower than in August 2009 but still marked a substantial increase from the August 2008 estimates. In contrast, visitors staying with friends or relatives increased significantly, making up for ground that was lost from August 2008 to August 2009. The net effect was a 22.7% increase in total visitation for August year-over-year. For calendar year-to-date 2010, estimated paid accommodations visitation was 4.5% higher than the same period the prior year while total visitation was flat.
- More than two-thirds of August 2010 visitors staying in paid accommodations were U.S. residents (69%), a slightly lower proportion than in August 2009 (76%). Germany and UK contributed the largest share of international visitors staying in paid accommodations during August 2010 (7% each) followed by BeNeLux and Canada (4% each).
- Similar to August 2009, half of U.S. visitors staying in paid accommodations came from the South (49%) – the majority of them being Florida residents (35%). Another three visitors in ten were from the Midwest (28%), followed by the Northeast (19%), and West (1%). The New York DMA drew the largest share of domestic visitors (13%) with Miami (11%), Tampa (9%) and Chicago (9%) following.

Visitor Expenditures

- The average per person per day expenditure was \$106.97 in August 2010 – a 4.7% increase from August 2009 (\$102.13) and the first monthly year-over-year increase noted in some time.
- Total visitor expenditures for August 2010 are estimated at \$166.8 million, a 28.2% rise from \$130.2 million in August 2009. Expenditures among those staying in paid accommodations decreased 7.4% from August 2009 to August 2010 but the substantial increase among those staying with friends and relatives (+89.9%) made up for the deficit. For calendar year-to-date 2010, total expenditures are down 7.4% due to a decline in spending among both paid and unpaid accommodations visitors (-4.2% and 11.6% respectively).



Total August Visitation					
	%		Visitor Estimates		% Change
	2009	2010	2009	2010	2009-2010
Paid Accommodations	61%	45%	194,292	175,089	-9.9%
Friends/Relatives	39%	55%	124,567	216,040	73.4%
<i>Total Visitation</i>			318,859	391,129	22.7%
August Visitor Origin - Visitors Staying in Paid Accommodations					
	2009	2010	2009	2010	
United States	76%	69%	147,625	120,134	-18.6%
Germany	9%	7%	17,062	12,780	-25.1%
UK	7%	7%	14,354	12,780	-11.0%
BeNeLux	3%	4%	5,692	7,668	34.7%
Canada	2%	4%	2,965	7,668	158.6%
France	1%	3%	2,658	5,112	92.3%
Ireland	--	2%	--	2,556	--
Scandinavia	1%	2%	1,454	2,556	75.8%
Latin America	--	1%	--	1,278	--
Switzerland	1%	1%	1,153	1,278	--
Austria	1%	--	1,329	--	--
Other	--	1%	--	1,278	--
U.S. Region (Paid Accommodations)					
	2009	2010	2009	2010	
Florida	28%	35%	41,390	42,175	1.9%
South (including Florida)	47%	49%	68,983	58,789	-14.8%
Midwest	29%	28%	42,770	33,229	-22.3%
Northeast	16%	19%	23,454	23,004	-1.9%
West	4%	1%	5,519	1,278	-76.8%
No Answer	5%	3%	6,898	3,834	-44.4%

2010 Top DMAs (Paid Accommodations)		
New York	13%	15,161
Miami-Fort Lauderdale	11%	12,834
Tampa-Saint Petersburg	9%	11,161
Chicago	9%	10,490
West Palm Beach-Fort Pierce	8%	10,005
Indianapolis	4%	5,317
Orlando-Daytona Beach-Melbourne	4%	5,139
Kansas City	4%	4,833
Saint Louis	3%	4,017
Baltimore	3%	3,916



Trip Planning

- August 2010 visitors were more likely than August 2009 visitors to engage in “spur of the moment” trip planning. The proportion who were talking about their Lee County trip, choosing Lee County as a destination, and making lodging reservations within one month of the trip increased significantly:
 - *Started to talk about trip* (9% vs. 4% August 2009)
 - *Chose Lee County for a trip* (13% vs. 6% August 2009)
 - *Made lodging reservations* (20% vs. 10% August 2009)

Along those same lines, fewer August 2010 visitors who stayed in paid accommodations said they made their Lee County lodging reservations before leaving home (81% vs. 93% August 2009) and more reported making reservations while in Florida (11% vs. 3% August 2009).

- Like their 2009 counterparts, the primary reason visitors came to Lee County in August 2010 was for a vacation (90%). However, a higher proportion indicated they were visiting friends or relatives (28% vs. 15% August 2009).

Visitor Profile

- Half of August 2010 visitors interviewed indicated they were staying in a hotel/motel/resort/B&B for their lodging (49%). Slightly more than one-third said they stayed in a condo/vacation home (36%) and one in ten at the home of a friend or family member (11%). Half of August 2010 visitors felt that the quality of accommodations *far exceeded* or *exceeded their expectations* (49%).
- The top activities enjoyed while in Lee County during August 2010 were *beaches, swimming, relaxing*, and to a lesser degree, *dining out* and *shopping*. Overall the activity profile was generally similar to that of August 2009 visitors. About half of August 2010 visitors took day trips outside of Lee County (48%) – an increase from August 2009 (38%).
- Visitor satisfaction remains extremely high, with 95% of August 2010 visitors reporting being *very satisfied* (61%) or *satisfied* (33%) with their visit. The vast majority indicated they were likely to return to Lee County (87%) and almost two-thirds of them are likely to return next year (61%).



- The least liked features about the Lee County area among August 2010 visitors were *insects* (22%), *weather* (15%) and *beach seaweed* (11%). *Insects* and *beach seaweed* were less prevalent concerns among August 2010 visitors than among prior year visitors. August 2010 visitors more frequently mentioned *weather* as a “dislike” than did August 2009 visitors.
- The demographic profile of August 2010 visitors and their travel parties differed from those in August 2009 on several characteristics:
 - The average household income was notably higher in August 2009 vs. August 2010 (\$110,122 vs. \$100,399).
 - Half of August 2010 visitors were traveling with children – a significantly lower proportion than did so last year (48% vs. 60% August 2009). Likewise, three in ten were traveling as a couple in August 2010 versus two in ten in August 2009 (29% vs. 19%). Naturally, the absence of children also decreased the travel party size slightly (3.5 vs. 4.0 August 2009).



Lodging Property Manager Assessments

- For the Lee County lodging industry in total, the number of *available* room nights in August 2010 was on par with the prior year while the number of *occupied* room nights decreased (-0.8% and -7.4% respectively). Hotel/motel/resort *available* room nights were up slightly 2.6% from a year ago but available room nights declined for condo/vacation home properties to a small extent (-1.2%) and more substantially for RV park/campground properties (-8.4%). Declines in *occupied* room nights were seen across all categories but most severe with condo/vacation homes (-13.1%) and RV park/campground properties (-21.0%).

	Occupied Room Nights			Available Room Nights		
	2009	2010	% Change	2009	2010	% Change
Hotel/Motel/Resort/B&B	155,518	152,318	-2.1%	347,980	357,158	2.6%
Condo/Cottage/Vacation Home	64,899	56,412	-13.1%	156,978	155,062	-1.2%
RV Park/Campground	34,240	27,058	-21.0%	152,737	139,903	-8.4%
Total	254,657	235,788	-7.4%	657,695	652,123	-0.8%

- Average occupancy rates decreased from 38.7% in August 2009 to an average of 36.2% in August 2010 (-6.6%). The increase in inventory for hotels/motels/resorts contributed to the decline in their occupancy rates (-4.6%). Occupancy rates for condos/cottages decreased (-12.0%) as did RV parks/campgrounds (-13.7%).
- Overall average daily rates increased from \$99.80 to \$101.88 year-over-year (+2.1%). ADR decreased slightly for hotel/motel/resort but increased for RV park/campground properties and condo/vacation home properties.
- RevPAR was down 4.7% from August 2009 driven by declines for hotels/motels/resorts (-6.2%) and condos/vacation homes (-7.6%).

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2009	2010	% Change	2009	2010	% Change	2009	2010	% Change
Property Managers Responding	142	125		149	126		142/149	125/126	
Hotel/Motel/Resort/B&B	44.7%	42.7%	-4.6%	\$104.64	\$102.87	-1.7%	\$46.77	\$43.87	-6.2%
Condo/Cottage/Vacation Home	41.3%	36.4%	-12.0%	\$122.77	\$128.88	5.0%	\$50.76	\$46.89	-7.6%
RV Park/Campground	22.4%	19.3%	-13.7%	\$34.26	\$40.00	16.8%	\$7.68	\$7.74	0.8%
AVERAGE	38.7%	36.2%	-6.6%	\$99.80	\$101.88	2.1%	\$38.64	\$36.84	-4.7%



- Property managers in August 2010 were not more positive than they had been in August 2009 when comparing their current month's *occupancy* and *revenue* year-over-year. Only slightly more than one-third reported their August 2010 *occupancy* was the same or better than the prior year (37% vs. 39% August 2009). Similarly, a third reported their *revenue* was the same or better than the prior year (35% vs. 36% August 2009).
- In terms of reservations for the next three months (September through November), the outlook among property managers is not any more encouraging. Only one property manager in three reported that their total level of reservations for the next three months are the same or better than the same period the prior year, while more than half (58%) reported that their reservations are down.

Property managers were also queried about the impact of the oil spill on their business in terms of cancellations and inquiries.

- Nearly two-thirds of managers don't know how many August room nights were cancelled as a result of the oil spill (61%), while one-third said that no room nights were cancelled as a result of the oil spill. The remaining 4% reported one or more room nights were cancelled – resulting in an average of 4.9 room nights cancelled for August (lower than last month).
- Looking ahead, there was similar uncertainty in terms of the impact of the oil spill on the number of room nights that have been cancelled for the next three months (September, October and November). Two-thirds did not provide an estimate (61% responded “don't know”). Among those who did, the number of room nights that have been cancelled due to the oil spill for this time period is 13.8 on average.
- Half (53%) of property managers said they had some/many fewer inquiries during August 2010 than they had at the same time last year, and the majority of them report that the decline in inquiries was the result of the economic downturn (58%) and only 30% say it was the oil spill. This differs from the past several months where most attributed the decline to the oil spill.



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Canada	2%	4%	2,965	7,668
France	1%	3%	2,658	5,112
Ireland	--	2%	--	2,556
Scandinavia	1%	2%	1,454	2,556
Latin America	--	1%	--	1,278
Switzerland	1%	1%	1,153	1,278
Austria	1%	--	1,329	--
Other	--	1%	--	1,278

Total Visitor Expenditures			
	2009	2010	% Change
Total Visitor Expenditures	\$130,153,697	\$166,842,461	28.2%
Paid Accommodations	\$82,567,769	\$76,478,993	-7.4%

Average Per Person Per Day Expenditures		
2009	2010	% Change
\$102.13	\$106.97	4.7%

First-Time/Repeat Visitors to Lee County		
	2009	2010
First-time	34%	28%
Repeat	66%	72%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2009	2010	% Change	2009	2010	% Change	2009	2010	% Change
Property Managers Responding	142	125		149	126		142/149	125/126	
Hotel/Motel/Resort/B&B	44.7%	42.7%	-4.6%	\$104.64	\$102.87	-1.7%	\$46.77	\$43.87	-6.2%
Condo/Cottage/Vacation Home	41.3%	36.4%	-12.0%	\$122.77	\$128.88	5.0%	\$50.76	\$46.89	-7.6%
RV Park/Campground	22.4%	19.3%	-13.7%	\$34.26	\$40.00	16.8%	\$7.68	\$7.74	0.8%
AVERAGE	38.7%	36.2%	-6.6%	\$99.80	\$101.88	2.1%	\$38.64	\$36.84	-4.7%

Calendar YTD 2010 Lee County Snapshot



Total Calendar YTD Visitation				
	%		Visitor Estimates	
	2009	2010	2009	2010
Paid Accommodations	46%	47%	1,583,798	1,655,103
Friends/Relatives	54%	53%	1,873,478	1,854,807
Total Visitation			3,457,276	3,509,910
Visitor Origin - Visitors Staying in Paid Accommodations				
	%		Visitor Estimates	
	2009	2010	2009	2010
Florida	11%	12%	141,769	166,506
United States	81%	81%	1,283,077	1,337,744
Germany	5%	5%	78,760	82,542
Canada	5%	5%	83,056	81,119
UK	3%	4%	50,120	65,464
BeNeLux	2%	2%	28,640	31,309
Scandinavia	1%	1%	15,752	15,654
France	1%	1%	17,184	9,962
Austria	<1%	<1%	4,296	7,116
Ireland	1%	<1%	7,160	7,116
Switzerland	1%	<1%	10,024	7,116
Latin America	--	<1%	--	1,423
Other	<1%	1%	5,728	8,539

Total Visitor Expenditures			
	2009	2010	% Change
Total Visitor Expenditures	\$2,004,280,590	\$1,855,938,865	-7.4%
Paid Accommodations	\$1,140,334,770	\$1,092,533,670	-4.2%

Average Per Person Per Day Expenditures		
2009	2010	% Change
\$120.26	\$117.20	-2.5%

First-Time/Repeat Visitors to Lee County		
	2009	2010
First-time	28%	26%
Repeat	71%	74%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2009	2010	% Change	2009	2010	% Change	2009	2010	% Change
Property Managers Responding									
Hotel/Motel/Resort/B&B	57.1%	55.9%	-2.0%	\$134.69	\$135.74	0.8%	\$76.87	\$75.93	-1.2%
Condo/Cottage/Vacation Home	61.1%	58.3%	-4.5%	\$173.07	\$179.13	3.5%	\$105.67	\$104.44	-1.2%
RV Park/Campground	54.4%	54.1%	-0.5%	\$45.81	\$46.40	1.3%	\$24.91	\$25.11	0.8%
AVERAGE	57.4%	56.1%	-2.3%	\$125.18	\$127.98	2.2%	\$71.87	\$71.81	-0.1%



Visitor Profile Analysis August 2010

A total of 200 interviews were conducted with visitors in Lee County during the month of August 2010. A total sample of this size is considered accurate to plus or minus 6.9 percentage points at the 95% confidence level.

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.

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.



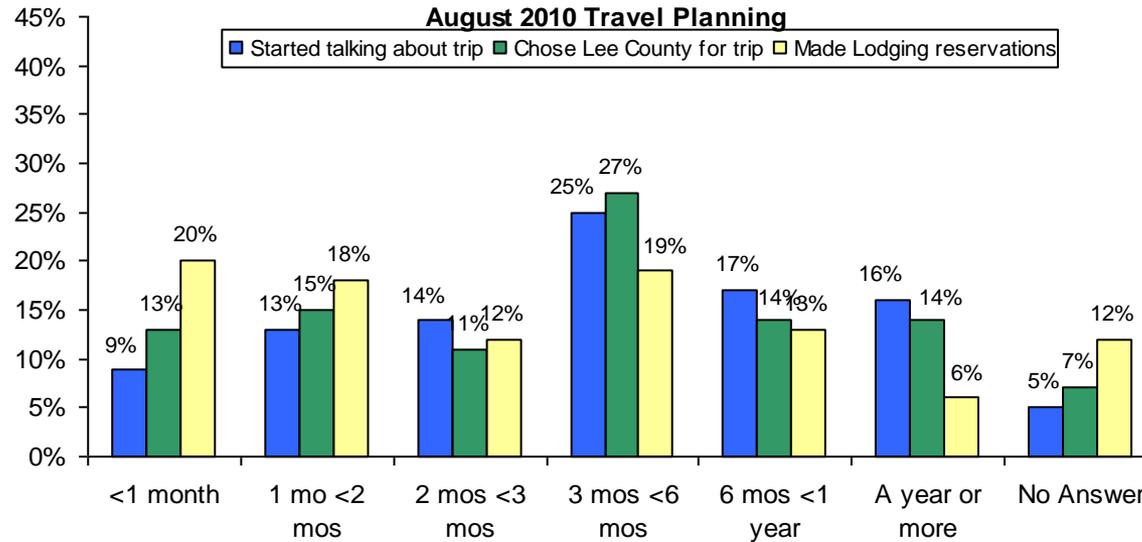
Travel Planning

	Started Talking About Trip		Chose Lee County for Trip		Made Lodging Reservations	
	2009	2010	2009	2010	2009	2010
Total Respondents	199	200	199	200	199	200
<1 month	4%	<9%>	6%	<13%>	10%	<20%>
1 mo - < 2 mos	16%	13%	21%	15%	22%	18%
2 mos - < 3 mos	15%	14%	15%	11%	16%	12%
3 mos - < 6 mos	24%	25%	22%	27%	22%	19%
6 mos - <1 year	<26%>	17%	<24%>	14%	14%	13%
A year or more	13%	16%	9%	14%	5%	6%
No answer	2%	5%	3%	7%	12%	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	
	2009	2010
Total Respondents Staying in Paid Accommodations	141	137
Before leaving home	<93%>	81%
After arriving in Florida	3%	<11%>
On the road, but not in Florida	--	1%
No Answer	4%	7%

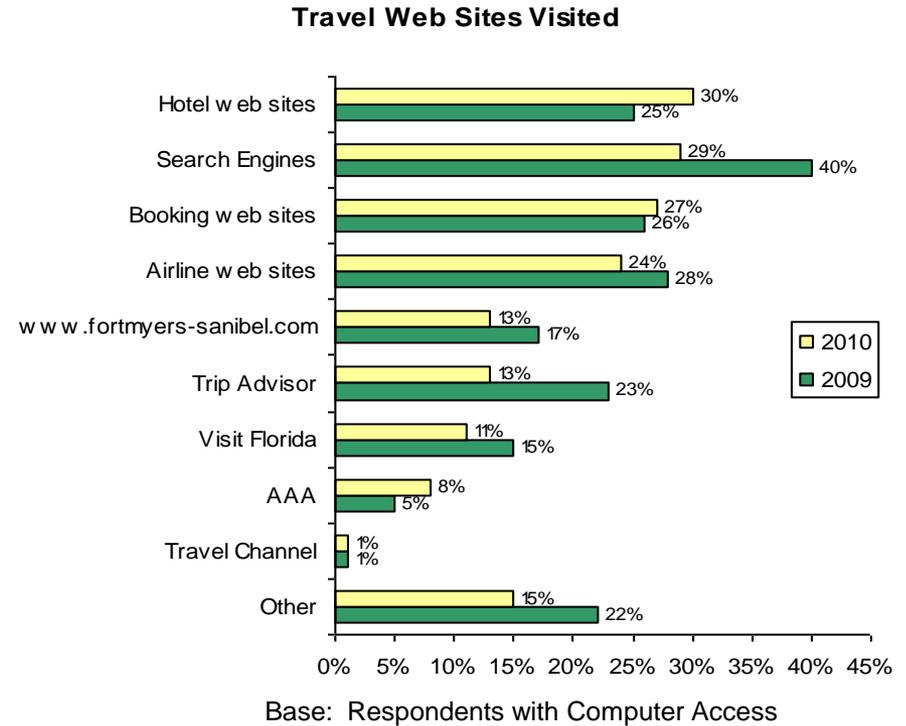
Q6: Did you make accommodation reservations for your stay in Lee County?

Travel Planning



Travel Web Sites Visited by August Travelers		
	2009	2010
Total Respondents with computer access	190	190
Visited web sites (net)	85%	82%
Hotel web sites	25%	30%
Search Engines	<40%>	29%
Booking web sites	26%	27%
Airline web sites	28%	24%
www.fortmyers-sanibel.com	17%	13%
Trip Advisor	<23%>	13%
Visit Florida	15%	11%
AAA	5%	8%
Travel Channel	1%	1%
Other	22%	15%
Did not visit web sites	13%	16%
No Answer	2%	3%

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



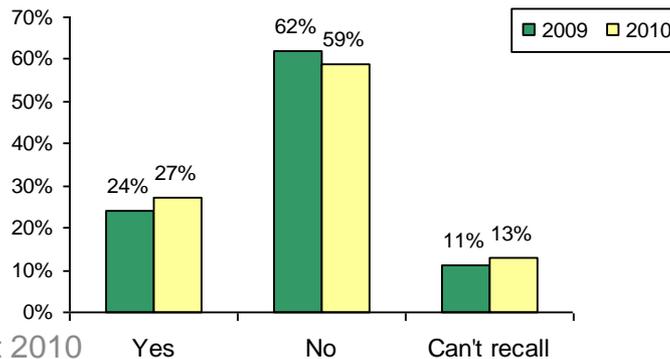
Travel Planning



August Travelers Requesting Information		
	2009	2010
Total Respondents	199	200
Requested information (Net)	<42%>	32%
<i>Hotel Web Site</i>	17%	15%
<i>Call hotel</i>	7%	7%
<i>VCB Web Site</i>	<13%>	6%
<i>Visitor Guide</i>	<7%>	2%
<i>E-Newsletter</i>	1%	1%
<i>Call local Chamber of Commerce</i>	2%	<1%
<i>Clipping/mailling coupon</i>	1%	--
<i>Other</i>	10%	12%
<u>Did not request information</u>	<u>51%</u>	<u>58%</u>
No Answer	7%	10%

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

Recall of Promotions



August 2010

Travel Agent Assistance		
	2009	2010
Total Respondents	199	200
Yes	7%	9%
No	91%	90%

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

Recall of Lee County Promotions		
	2009	2010
Total Respondents	199	200
Yes	24%	27%
No	62%	59%
Can't recall	11%	13%

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

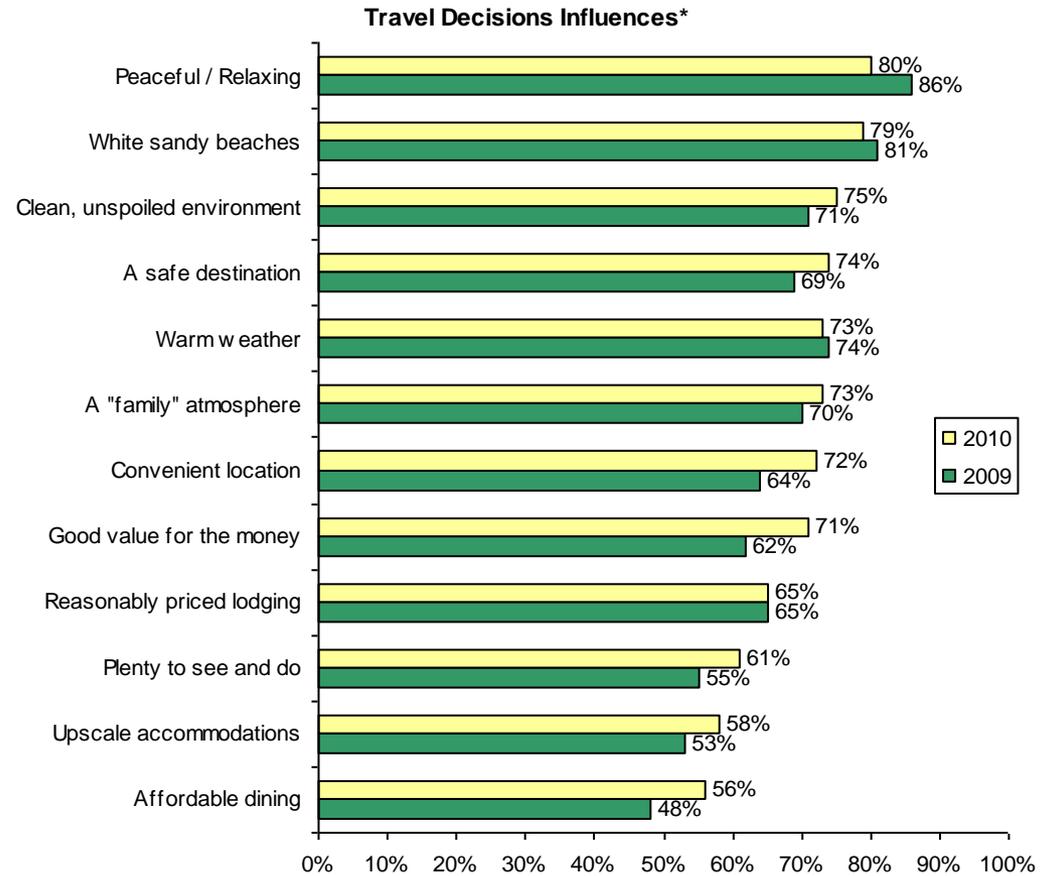
Travel Planning



August Travel Decision Influences*		
	2009	2010
Total Respondents	199	200
Peaceful / Relaxing	86%	80%
White sandy beaches	81%	79%
Clean, unspoiled environment	71%	75%
A safe destination	69%	74%
Warm weather	74%	73%
A "family" atmosphere	70%	73%
Convenient location	64%	72%
Good value for the money	62%	71%
Reasonably priced lodging	65%	65%
Plenty to see and do	55%	61%
Upscale accommodations	53%	58%
Affordable dining	48%	56%

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

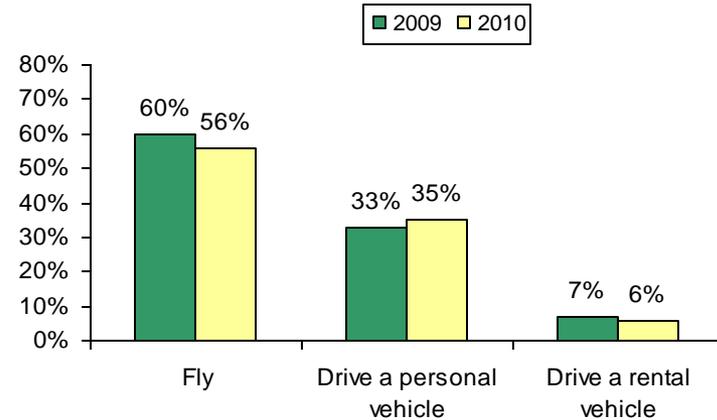
Mode of Transportation		
	2009	2010
Total Respondents	199	200
Fly	60%	56%
Drive a personal vehicle	33%	35%
Drive a rental vehicle	7%	6%
Drive an RV	--	4%
Other/No Answer	1%	1%

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

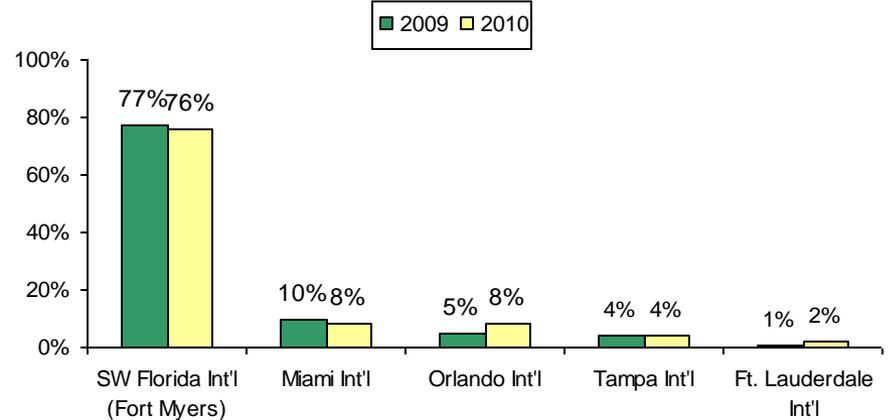
Airport		
	2009	2010
Total Respondents who arrived by air	119	111
SW Florida Int'l (Fort Myers)	77%	76%
Miami Int'l	10%	8%
Orlando Int'l	5%	8%
Tampa Int'l	4%	4%
Ft. Lauderdale Int'l	1%	2%
West Palm Beach Int'l	--	1%
Sarasota / Bradenton	--	1%
Other/No Answer (net)	3%	1%

Q2: At which Florida airport did you land?

Mode of Transportation



Airport

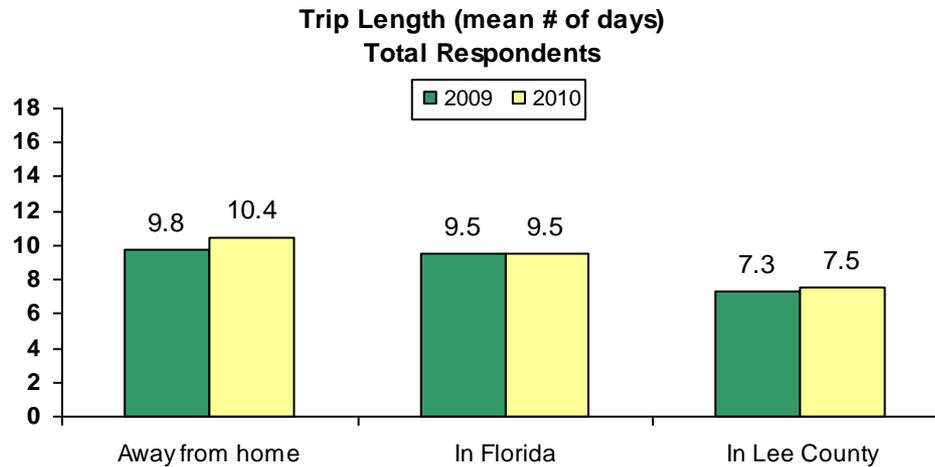




Trip Profile

August Trip Length Mean # of Days			
	Total Respondents		
	2009	2010	% Change
Total Respondents	199	200	
Away from home	9.8	10.4	6.1%
In Florida	9.5	9.5	0.0%
In Lee County	7.3	7.5	2.7%

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

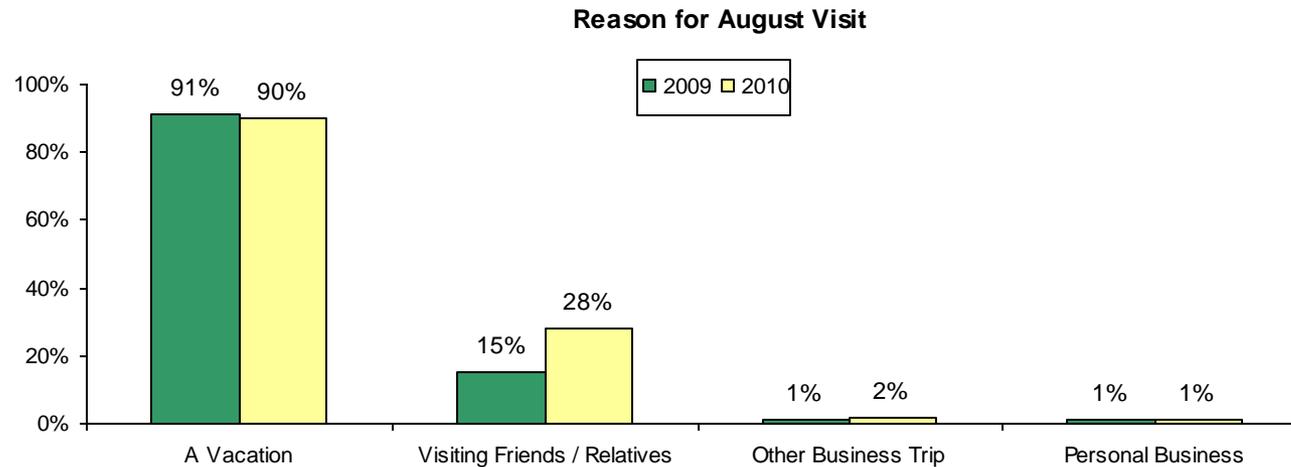




Trip Profile

Reason for August Visit		
	2009	2010
Total Respondents	199	200
A Vacation	91%	90%
Visiting Friends / Relatives	15%	<28%>
Other Business Trip	1%	2%
Personal Business	1%	1%
Sporting Event(s)	1%	--
A Conference / Meeting	--	--
A Convention / Trade Show	--	--
Other/No Answer	2%	4%

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





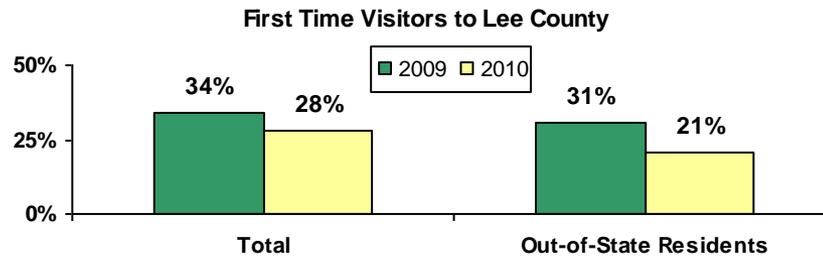
Trip Profile

First Time Visitors to Lee County

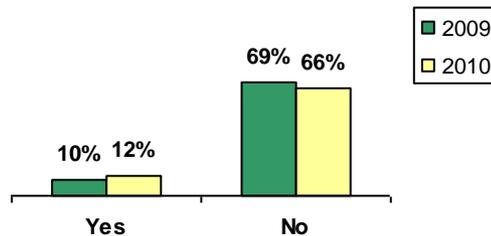
	TOTAL		Florida Residents		Out-of-State Residents		International Visitors	
	2009	2010	2009	2010	2009	2010	2009	2010
Total Respondents	199	200	39*	45*	104	93	46*	54*
Yes	34%	28%	18%	9%	31%	21%	55%	53%
No	66%	72%	80%	91%	69%	79%	45%	47%
No Answer	<1%	--	2%	--	--	--	--	--

Q20: Is this your first visit to Lee County?

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



First Time Visitors to Florida



First Time Visitors to Florida		
	2009	2010
Total Respondents	199	200
Yes	10%	12%
No	69%	66%
No answer	1%	--
<i>FL Residents*</i>	20%	23%

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.



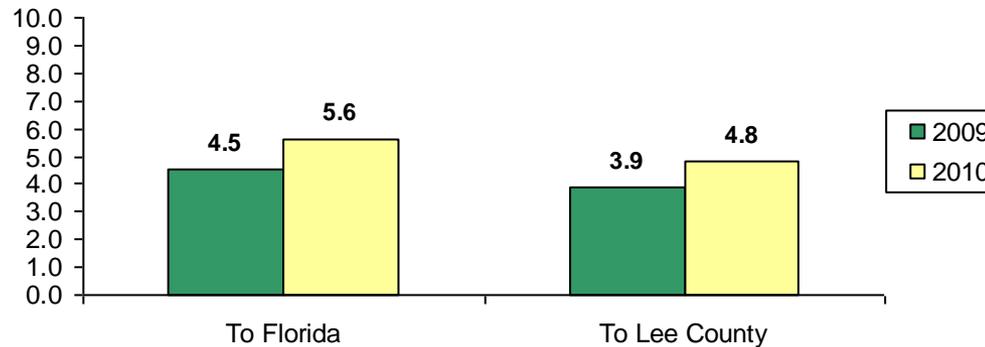
Trip Profile

Previous Visits in Five Years				
	Mean # of Visits to Florida		Mean # of Visits to Lee County	
	2009	2010	2009	2010
Base: Repeat Visitors	137 (FL res. Excl.)	131 (FL res. Excl.)	130	145
Number of visits	4.5	5.6	3.9	4.8

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

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

Previous Visits in Five Years

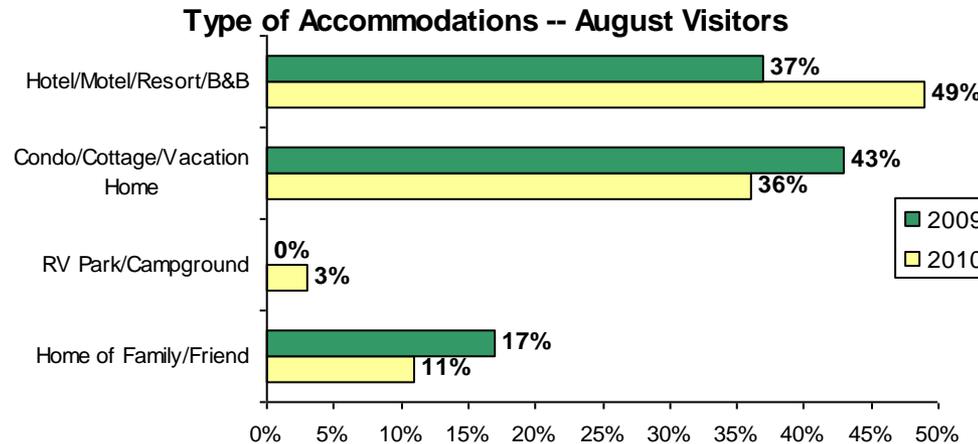




Trip Profile

Type of Accommodations - August Visitors		
	2009	2010
Total Respondents	199	200
Hotel/Motel/Resort/B&B	37%	<49%>
Hotel/motel/inn	21%	<32%>
Resort	16%	17%
B&B	<1%	--
Condo/Cottage/Vacation Home	43%	36%
Rented home/condo	<34%>	16%
Borrowed home/condo	6%	6%
Owned home/condo	4%	<14%>
RV Park/Campground	--	3%
Home of family/friend	17%	11%
Day trip (no accommodations)	2%	1%

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



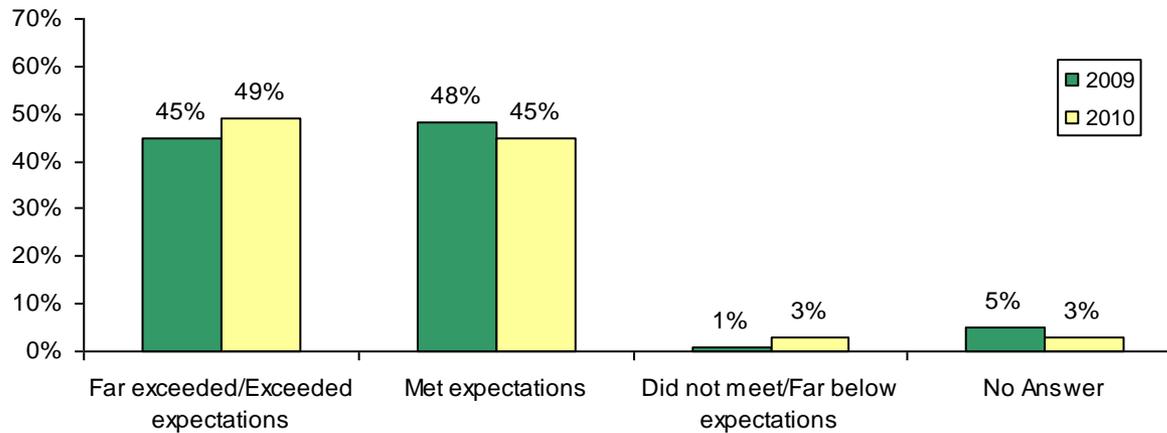


Trip Profile

Quality of Accommodations		
	2009	2010
Total Respondents	199	200
Far exceeded/Exceeded expectations	45%	49%
Met your expectations	48%	45%
Did not meet/Far below expectations	1%	3%
No Answer	5%	3%

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

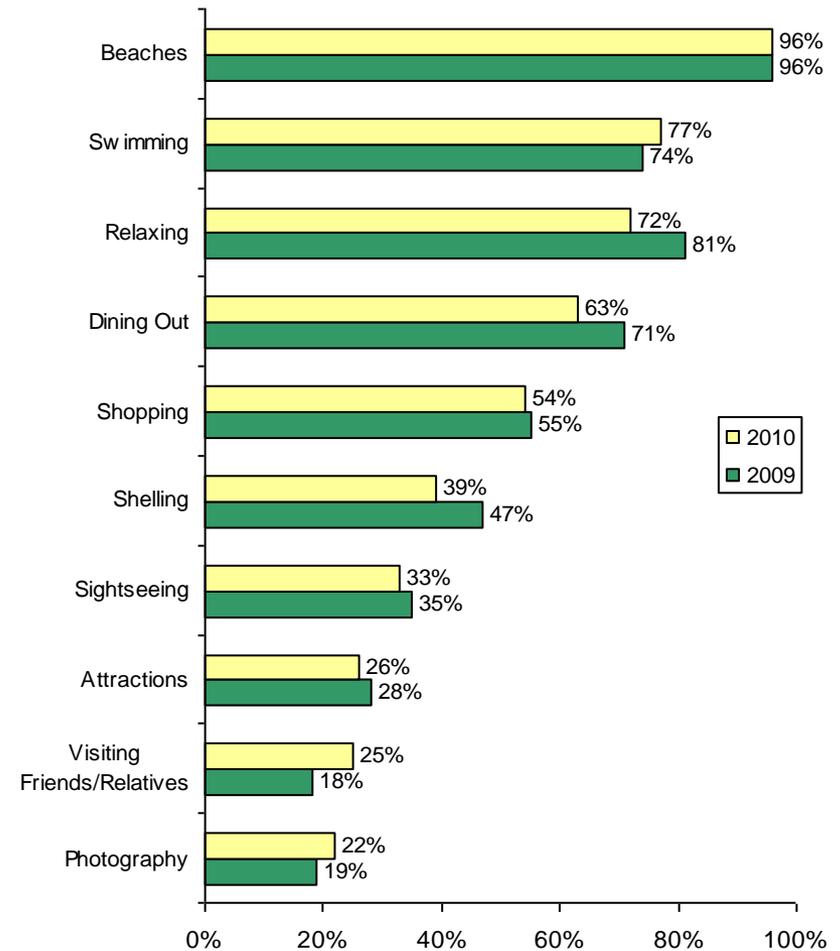
Quality of Accommodations



Trip Activities



August Activities Enjoyed		
	2009	2010
Total Respondents	199	200
Beaches	96%	96%
Swimming	74%	77%
Relaxing	<81%>	72%
Dining Out	71%	63%
Shopping	55%	54%
Shelling	47%	39%
Sightseeing	35%	33%
Attractions	28%	26%
Visiting Friends/Relatives	18%	25%
Photography	19%	22%
Watching Wildlife	<29%>	21%
Exercise / Working Out	13%	15%
Miniature Golf	13%	13%
Bars / Nightlife	16%	13%
Bicycle Riding	17%	12%
Boating	12%	11%
Birdwatching	15%	10%
Parasailing / Jet Skiing	12%	9%
Kayaking / Canoeing	6%	8%
Golfing	7%	8%
Fishing	<15%>	7%
Cultural Events	2%	6%
Sporting Event	1%	4%
Tennis	4%	4%
Guided Tour	6%	3%
Scuba Diving / Snorkeling	3%	2%
Other	1%	3%



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

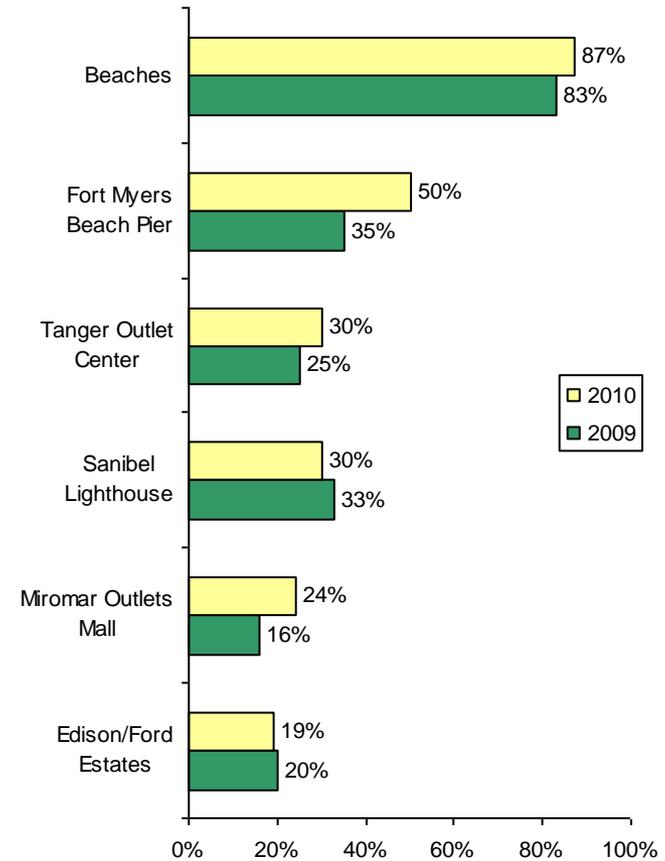
August 2010

Trip Activities



August Attractions Visited		
	2009	2010
Total Respondents	199	200
Beaches	83%	87%
Fort Myers Beach Pier	35%	<50%>
Tanger Outlet Center	25%	30%
Sanibel Lighthouse	33%	30%
Miromar Outlets Mall	16%	<24%>
Edison / Ford Estates	20%	19%
Edison Mall	8%	<15%>
Shell Factory and Nature Park	7%	<15%>
Ding Darling National Wildlife Refuge	<25%>	13%
Bell Tower Shops	5%	<11%>
Coconut Point Mall	9%	9%
Periwinkle Place	<18%>	9%
Gulf Coast Town Center	5%	6%
Manatee Park	4%	3%
Bailey-Matthews Shell Museum	7%	3%
Babcock Wilderness Adventures	--	1%
Broadway Palm Dinner Theater	1%	1%
Other	9%	4%
None/No Answer	3%	5%

August Attractions Visited



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

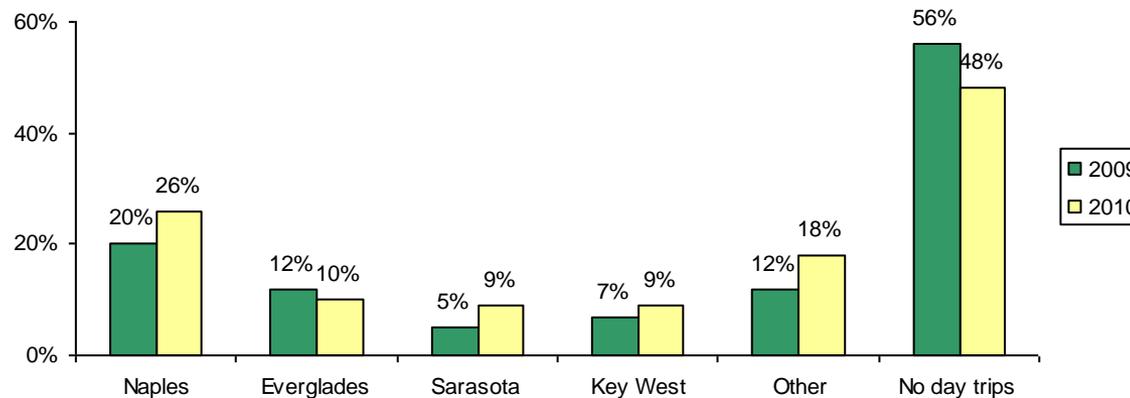


Trip Activities

August Day Trips Outside Lee County		
	2009	2010
Total Respondents	199	200
<u>Any day trips (net)</u>	<u>38%</u>	<u><48%></u>
<i>Naples</i>	20%	26%
<i>Everglades</i>	12%	10%
<i>Sarasota</i>	5%	9%
<i>Key West</i>	7%	9%
<i>Other</i>	12%	18%
<u>No day trips</u>	<u>56%</u>	<u>48%</u>
No Answer	6%	4%

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

August Day Trips Outside Lee County

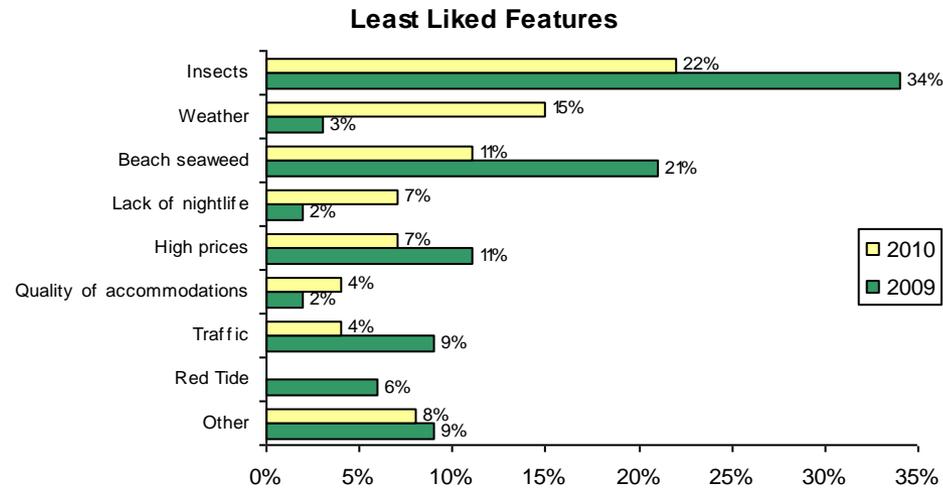




Trip Activities

Least Liked Features		
	2009	2010
Total Respondents	199	200
Insects	<34%>	22%
Weather	3%	<15%>
Beach seaweed	<21%>	11%
Lack of nightlife	2%	<7%>
High prices	11%	7%
Quality of accommodations	2%	4%
Traffic	9%	4%
Red Tide	6%	--
Other	9%	8%
Nothing/No Answer	35%	41%

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

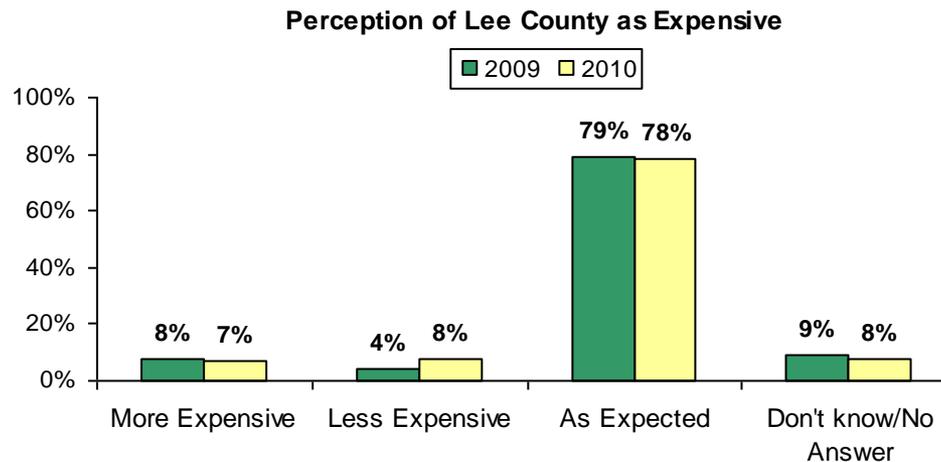




Trip Activities

Perception of Lee County as Expensive		
	2009	2010
Total Respondents	199	200
More Expensive	8%	7%
Less Expensive	4%	8%
As Expected	79%	78%
Don't know/No Answer	9%	8%

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



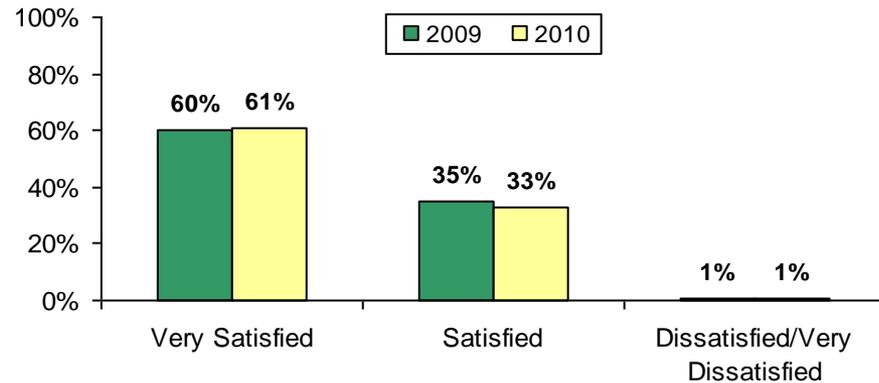


Lee County Experience

Satisfaction with Visit		
	2009	2010
Total Respondents	199	200
<u>Satisfied</u>	<u>95%</u>	<u>95%</u>
<i>Very Satisfied</i>	60%	61%
<i>Satisfied</i>	35%	33%
Neither	1%	2%
Dissatisfied/Very Dissatisfied	1%	1%
Don't know/no answer	3%	3%

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

Satisfaction with Visit





Future Plans

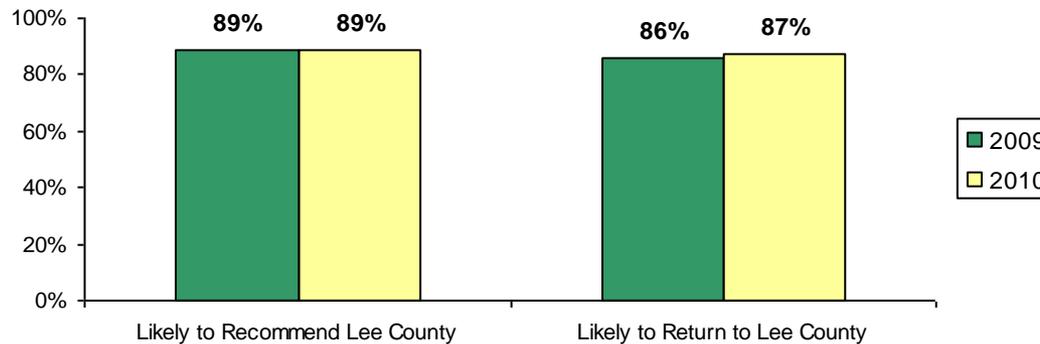
Likelihood to Recommend/Return to Lee County		
	2009	2010
Total Respondents	199	200
Likely to Recommend Lee County	89%	89%
Likely to Return to Lee County	86%	87%
Base: Total Respondents Planning to Return	171	174
Likely to Return Next Year	51%	61%

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?

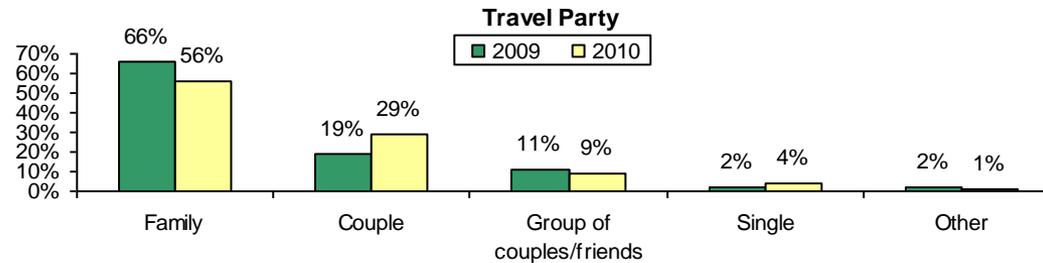
Likelihood to Recommend/Return to Lee County (Responded "Yes")





Visitor and Travel Party Demographic Profile

August Travel Party		
	2009	2010
Total Respondents	199	200
Family	66%	56%
Couple	19%	<29%>
Group of couples/friends	11%	9%
Single	2%	4%
Other	2%	1%
Mean travel party size	4.0	3.5
Mean adults in travel party	2.7	2.6



Travel Parties with Children		
	2009	2010
Total Respondents	199	200
Traveling with any Children (net)	<60%>	48%
Any younger than 6	<23%>	15%
Any 6 - 11 years old	<35%>	24%
Any 12 - 17 years old	33%	25%

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:

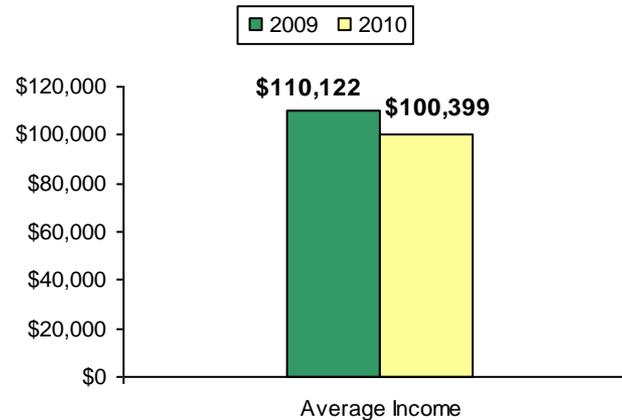
Younger than 6 years old/6-11 years old/12-17 years old/Adults



Visitor and Travel Party Demographic Profile

August Visitor Demographic Profile		
	2009	2010
Total Respondents	199	200
Vacations per year (mean)	2.8	2.9
Short getaways per year (mean)	3.4	4.2
Age of respondent (mean)	47.0	45.7
Annual household income (mean)	<\$110,122>	\$100,399
Marital Status		
Married	76%	73%
Single	10%	15%
Other	13%	9%

Annual Household Income



Q37: How many vacations, lasting FIVE (5) OR MORE NIGHTS AWAY FROM HOME, do you take in an average year?

Q38: And how many short getaway trips lasting AT LEAST (1) BUT NOT MORE THAN FOUR (4) NIGHTS AWAY FROM HOME, do you take in an average year?

Q41: What is your age, please?

Q43: What is your total annual household income before taxes?

Q40. Are you: Married/Single/Other



Visitor Origin and Visitation Estimates

Total August Visitation					
	%		Visitor Estimates		% Change
	2009	2010	2009	2010	2009-2010
Paid Accommodations	61%	45%	194,292	175,089	-9.9%
Friends/Relatives	39%	55%	<u>124,567</u>	<u>216,040</u>	<u>73.4%</u>
<i>Total Visitation</i>			<i>318,859</i>	<i>391,129</i>	<i>22.7%</i>
August Visitor Origin - Visitors Staying in Paid Accommodations					
	2009	2010	2009	2010	
United States	76%	69%	147,625	120,134	-18.6%
Germany	9%	7%	17,062	12,780	-25.1%
UK	7%	7%	14,354	12,780	-11.0%
BeNeLux	3%	4%	5,692	7,668	34.7%
Canada	2%	4%	2,965	7,668	158.6%
France	1%	3%	2,658	5,112	92.3%
Ireland	--	2%	--	2,556	--
Scandinavia	1%	2%	1,454	2,556	75.8%
Latin America	--	1%	--	1,278	--
Switzerland	1%	1%	1,153	1,278	--
Austria	1%	--	1,329	--	--
Other	--	1%	--	1,278	--
U.S. Region (Paid Accommodations)					
	2009	2010	2009	2010	
Florida	28%	35%	41,390	42,175	1.9%
South (including Florida)	47%	49%	68,983	58,789	-14.8%
Midwest	29%	28%	42,770	33,229	-22.3%
Northeast	16%	19%	23,454	23,004	-1.9%
West	4%	1%	5,519	1,278	-76.8%
No Answer	5%	3%	6,898	3,834	-44.4%

2010 Top DMAs (Paid Accommodations)		
New York	13%	15,161
Miami-Fort Lauderdale	11%	12,834
Tampa-Saint Petersburg	9%	11,161
Chicago	9%	10,490
West Palm Beach-Fort Pierce	8%	10,005
Indianapolis	4%	5,317
Orlando-Daytona Beach-Melbourne	4%	5,139
Kansas City	4%	4,833
Saint Louis	3%	4,017
Baltimore	3%	3,916



Occupancy Data Analysis August 2010

Property managers representing 132 properties in Lee County were interviewed for the August 2010 Occupancy Survey between August 1 and August 15, 2010, a sample considered accurate to plus or minus 8.5 percentage points at the 95% confidence level.

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.



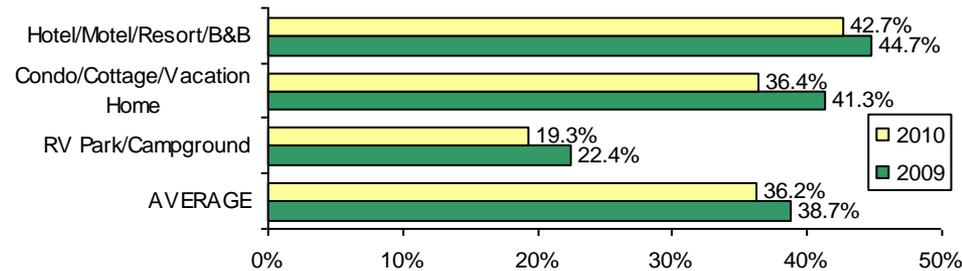
August Occupancy/Daily Rates

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2009	2010	% Change	2009	2010	% Change	2009	2010	% Change
Property Managers Responding	142	125		149	126		142/149	125/126	
Hotel/Motel/Resort/B&B	44.7%	42.7%	-4.6%	\$104.64	\$102.87	-1.7%	\$46.77	\$43.87	-6.2%
Condo/Cottage/Vacation Home	41.3%	36.4%	-12.0%	\$122.77	\$128.88	5.0%	\$50.76	\$46.89	-7.6%
RV Park/Campground	22.4%	19.3%	-13.7%	\$34.26	\$40.00	16.8%	\$7.68	\$7.74	0.8%
AVERAGE	38.7%	36.2%	-6.6%	\$99.80	\$101.88	2.1%	\$38.64	\$36.84	-4.7%

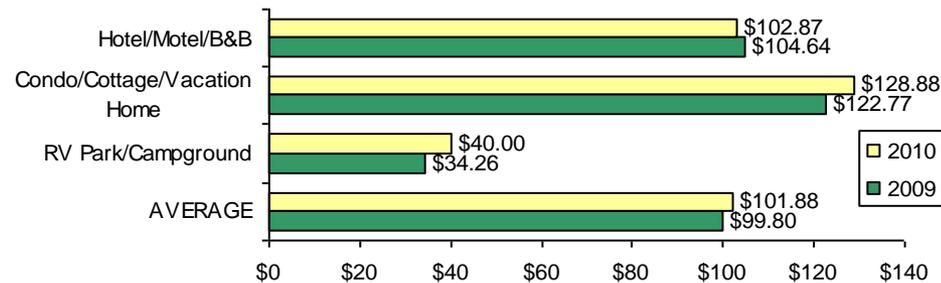
Q16: What was your overall average occupancy rate for the month of August?

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

Average Occupancy Rate



Average Daily Rate

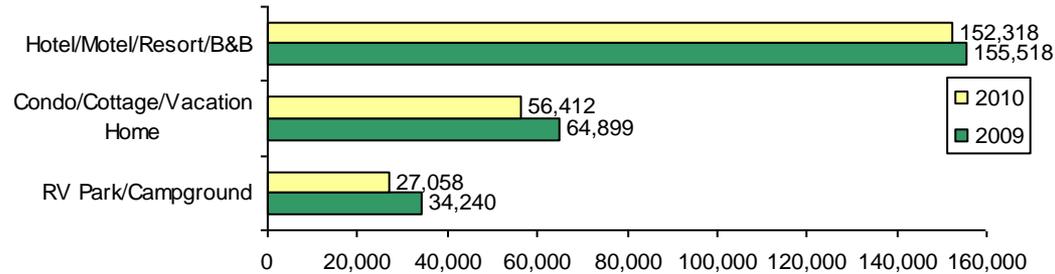




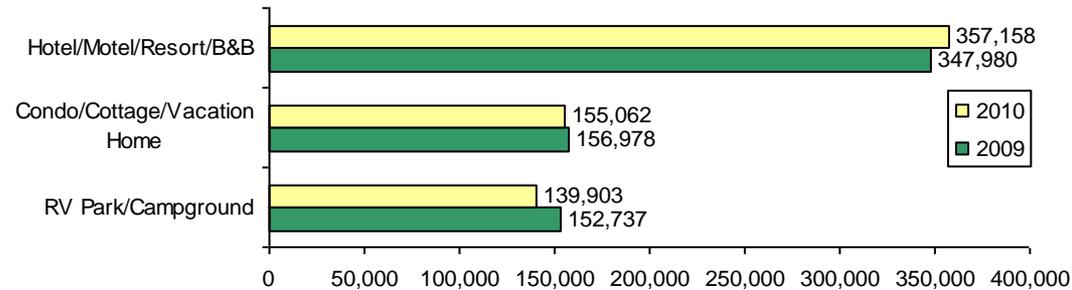
August Room/Unit/Site Nights

	Occupied Room Nights			Available Room Nights		
	2009	2010	% Change	2009	2010	% Change
Hotel/Motel/Resort/B&B	155,518	152,318	-2.1%	347,980	357,158	2.6%
Condo/Cottage/Vacation Home	64,899	56,412	-13.1%	156,978	155,062	-1.2%
RV Park/Campground	34,240	27,058	-21.0%	152,737	139,903	-8.4%
Total	254,657	235,788	-7.4%	657,695	652,123	-0.8%

Occupied Room Nights



Available Room Nights

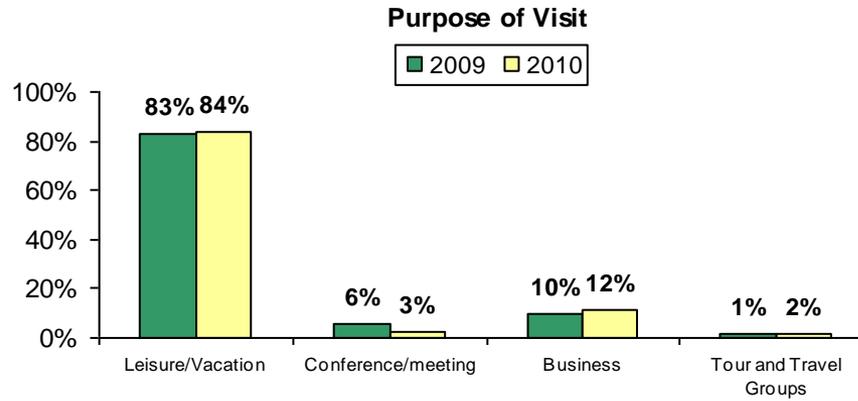




Lodging Management Estimates

August Guest Profile		
	2009	2010
Property Managers Responding	129	104
Purpose of Visit		
Leisure/Vacation	83%	84%
Conference/meeting	6%	3%
Business	10%	12%
Tour and Travel Groups	1%	2%
Property Managers Responding	139	118
Average guests per room	2.7	2.7
Property Managers Responding	138	117
Average length of stay in nights	5.2	4.7

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?

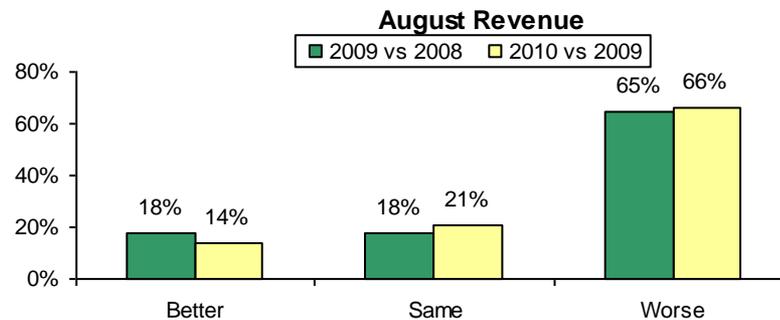
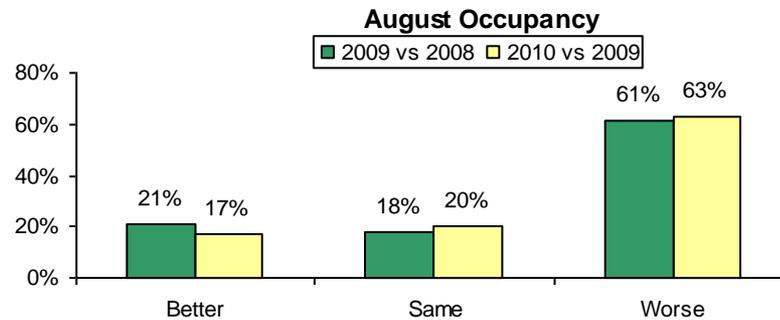




Occupancy Barometer

	August Occupancy		August Revenue	
	2009	2010	2009	2010
Property Managers Responding	141	119	136	116
Better than prior year	21%	17%	18%	14%
Same as prior year	18%	20%	18%	21%
Worse than prior year	61%	63%	65%	66%

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?

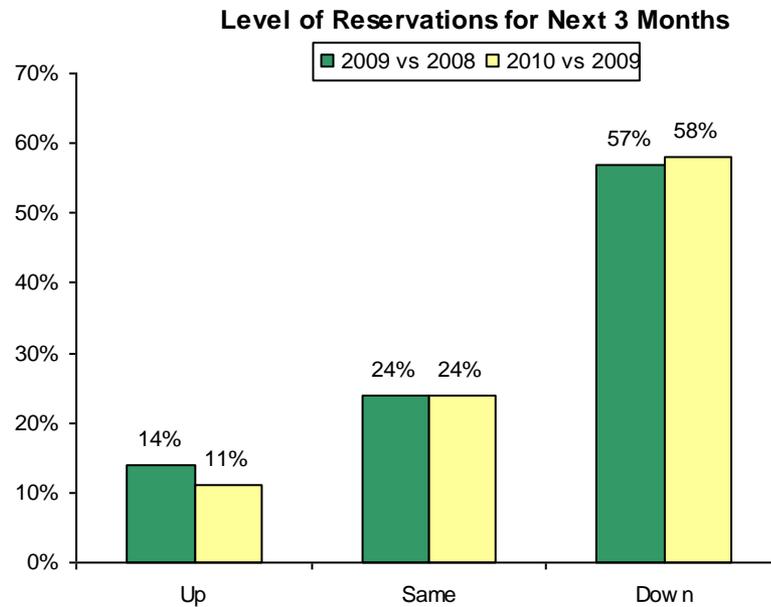




Occupancy Barometer

Level of Reservations for next 3 months Compared to Last Year		
	2009	2010
Total Answering Respondents	144	122
Up	14%	11%
Same	24%	24%
Down	57%	58%
N/A	6%	7%

Q26: Compared to (the next three months) of last year, is your property's total level of reservations up, the same or down for (the next three months) of this year?



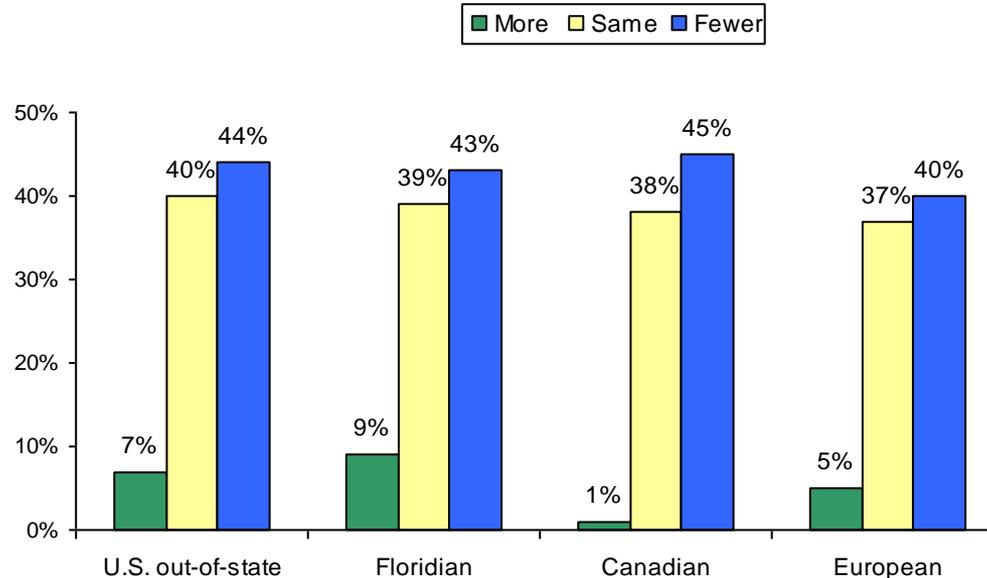


Occupancy Barometer

Origin of Guests for Next 3 Months Compared to Last Year								
Property Managers Responding (122/97 Minimum)	More		Same		Fewer		Not Applicable	
	2009	2010	2009	2010	2009	2010	2009	2010
U.S out-of-state	11%	7%	41%	40%	41%	44%	6%	10%
Floridian	<20%>	9%	35%	39%	36%	43%	9%	9%
Canadian	<10%>	1%	40%	38%	33%	45%	18%	15%
European	8%	5%	43%	37%	30%	40%	18%	17%

Q27: Now thinking about the specific origins of your guests for the upcoming next three months 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 2010



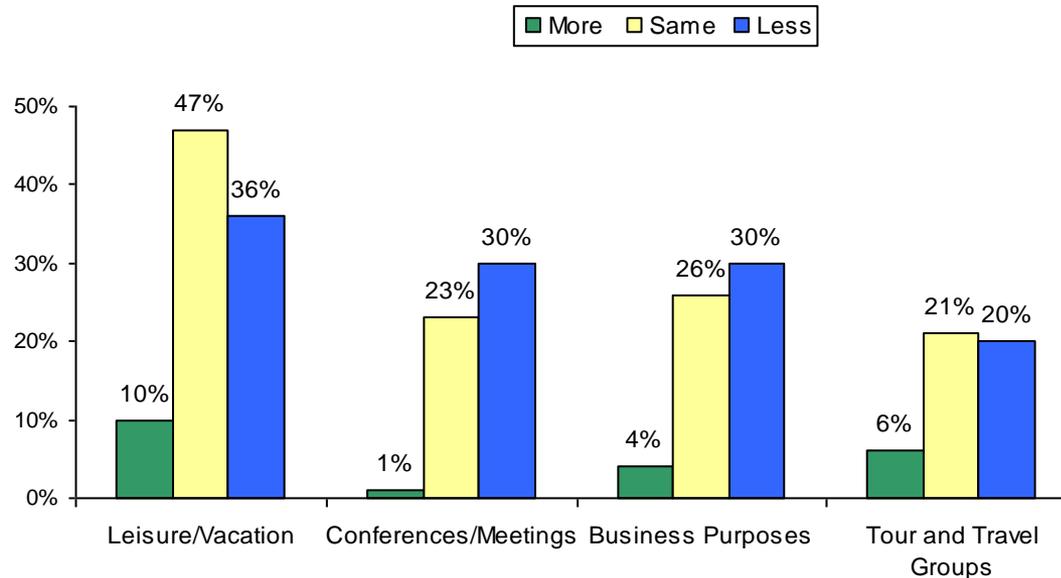


Occupancy Barometer

Type of Travelers for Next 3 Months Compared to Last Year								
Property Managers Responding (118/97 Minimum)	More		Same		Less		Not Applicable	
	2009	2010	2009	2010	2009	2010	2009	2010
Leisure/Vacation	16%	10%	39%	47%	38%	36%	7%	7%
Conferences/Meetings	<6%>	1%	14%	23%	34%	30%	47%	46%
Business Purposes	7%	4%	18%	26%	31%	30%	43%	40%
Tour and Travel Groups	7%	6%	14%	21%	26%	20%	53%	54%

Q28: Compared to (the next three months) of last year will the following types of travelers generate more, the same or less business for your property for the upcoming (next three months) of this year?

Type of Travelers for Next 3 Months Compared to Last Year
August 2010





Oil Spill Impact

Beginning in May 2010, property managers were asked questions regarding the impact the Oil Spill in the Gulf of Mexico had to their occupancy and inquiries.

Room Night Cancellations		
	August 2010	Next 3 Months
Total Property Managers Responding	127	127
0 roomnights	35%	33%
1-7 roomnights	--	3%
8-14 roomnights	1%	2%
15 or more roomnights	3%	2%
Don't know	61%	61%
Average room nights cancelled	4.9	13.8

Q31. During the month of August, about how many room nights at your property have been cancelled as a result of the BP oil spill in the Gulf of Mexico and the publicity surrounding it?

Q32. About how many room nights have been canceled for – September, October, November – due to the oil spill and the publicity surrounding it?

Inquiries	
	August 2010
Total Property Managers Responding	127
More inquiries (net)	13%
Many more	4%
Some more	9%
About the same number	34%
Fewer inquiries (net)	53%
Some fewer	20%
Many fewer	33%

Q33. Please think about the number of inquiries you have had via phone, email, or the Internet during the month of August. How do the number of inquiries compare with what you were experiencing last year at this time, i.e., August 2009?

Factors Impacting Declines in Inquiries	
	August 2010
Total Property Managers Responding "Fewer Inquiries"	67
BP oil spill	30%
Economic downturn	58%
Weather	7%
Other	5%

Q34. In your estimation, what percentage of the decline in inquiries is attributable to each of the following factors?



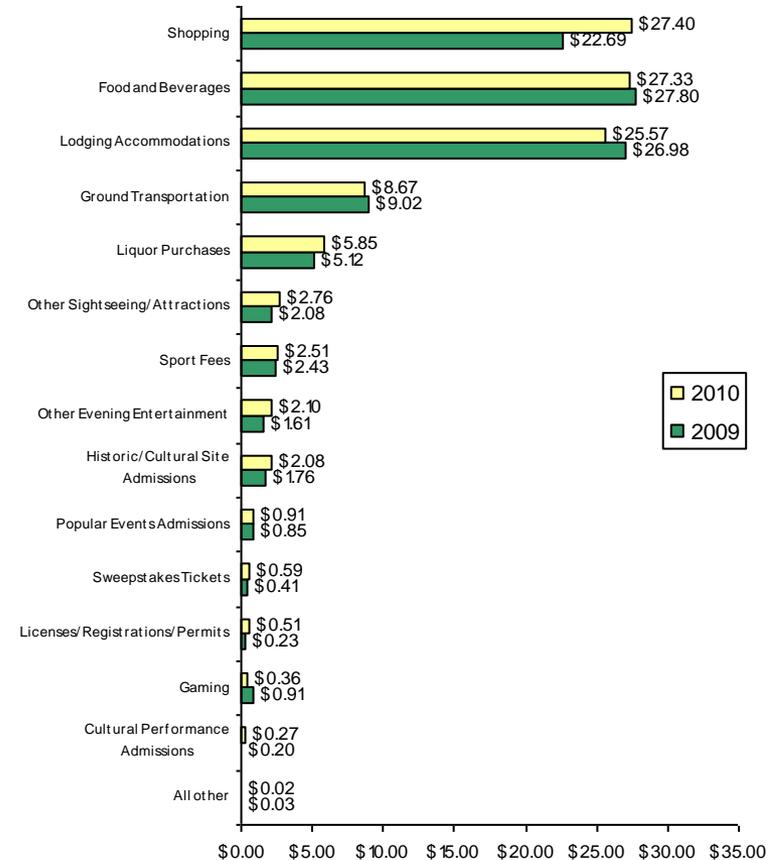
Economic Impact Analysis August 2010



Average Expenditures

August Average Expenditures per Person per Day			
	2009	2010	% Change
TOTAL	\$102.13	\$106.97	4.7%
Shopping	\$22.69	\$27.40	20.8%
Food and Beverages	\$27.80	\$27.33	-1.7%
Lodging Accommodations	\$26.98	\$25.57	-5.2%
Ground Transportation	\$9.02	\$8.67	-3.9%
Liquor Purchases	\$5.12	\$5.85	14.3%
Other Sightseeing/Attractions	\$2.08	\$2.76	32.7%
Sport Fees	\$2.43	\$2.51	3.3%
Other Evening Entertainment	\$1.61	\$2.10	30.4%
Historic/Cultural Site Admissions	\$1.76	\$2.08	18.2%
Popular Events Admissions	\$0.85	\$0.91	7.1%
Sweepstakes Tickets	\$0.41	\$0.59	43.9%
Licenses/Registrations/Permits	\$0.23	\$0.51	121.7%
Gaming	\$0.91	\$0.36	-60.4%
Cultural Performance Admissions	\$0.20	\$0.27	35.0%
All other	\$0.03	\$0.02	-33.3%

Average Expenditures per Person per Day

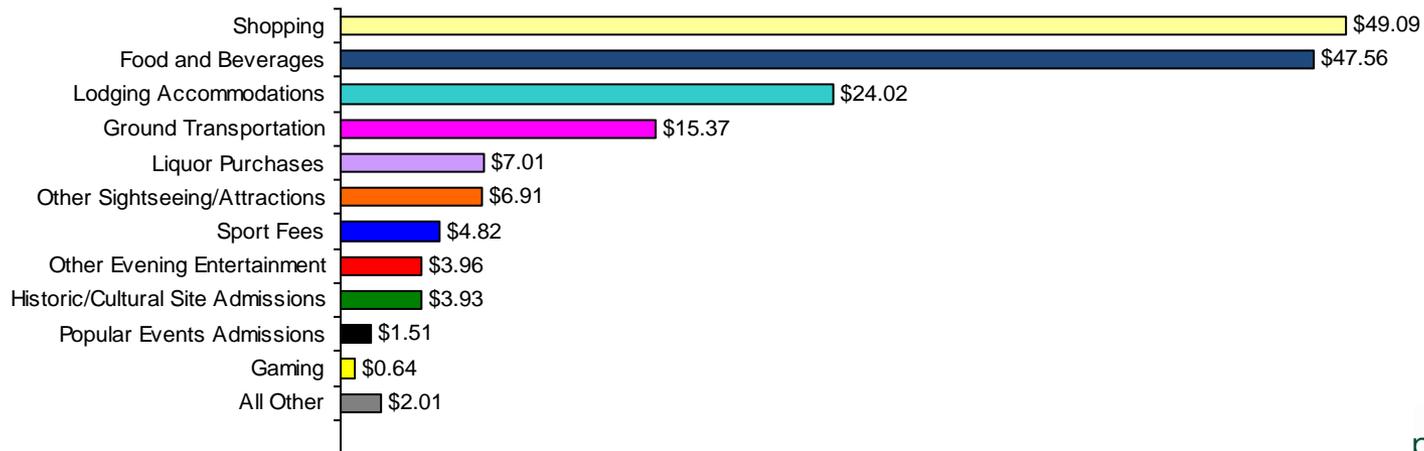




Total Visitor Expenditures by Spending Category

August TOTAL EXPENDITURES			
	2009	2010	% Change
TOTAL	\$130,153,697	\$166,842,461	28.2%
Shopping	\$36,722,606	\$49,090,912	33.7%
Food and Beverages	\$34,882,994	\$47,563,211	36.4%
Lodging Accommodations	\$25,414,921	\$24,021,029	-5.5%
Ground Transportation	\$11,540,620	\$15,372,694	33.2%
Liquor Purchases	\$6,889,790	\$7,008,960	1.7%
Other Sightseeing/Attractions	\$2,773,469	\$6,911,144	149.2%
Sport Fees	\$2,993,292	\$4,822,402	61.1%
Other Evening Entertainment	\$2,177,887	\$3,961,269	81.9%
Historic/Cultural Site Admissions	\$2,934,990	\$3,931,776	34.0%
Popular Events Admissions	\$1,839,201	\$1,509,178	-17.9%
Gaming	\$945,587	\$644,049	-31.9%
All Other	\$1,038,340	\$2,005,837	93.2%

August 2010 Total Expenditures
(Millions)





Total Visitor Expenditures by Spending Category

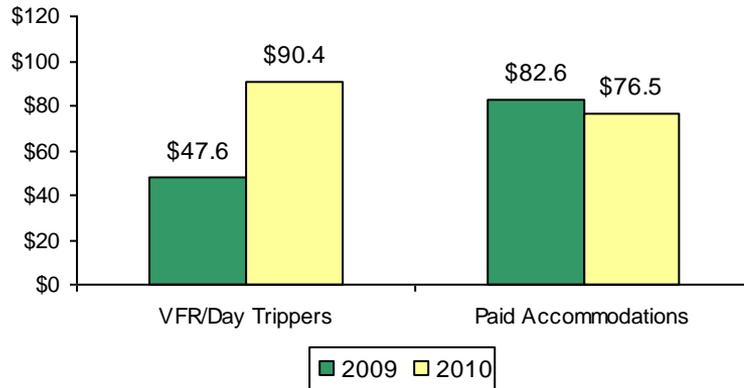
ALL PROPERTIES						
	Staying in Paid Accommodations			Visiting Friends and Relatives/ Day Trippers		
	2009	2010	% Change	2009	2010	% Change
TOTAL	<u>\$82,567,769</u>	<u>\$76,478,993</u>	<u>-7.4%</u>	<u>\$47,585,928</u>	<u>\$90,363,468</u>	<u>89.9%</u>
Lodging Accommodations	\$25,414,921	\$24,021,029	-5.5%	\$0	\$0	--
Food and Beverages	\$20,319,544	\$17,719,447	-12.8%	\$14,563,450	\$29,843,764	104.9%
Shopping	\$20,295,723	\$17,610,509	-13.2%	\$16,426,883	\$31,480,403	91.6%
Ground Transportation	\$6,040,052	\$5,592,471	-7.4%	\$5,500,568	\$9,780,223	77.8%
Liquor Purchases	\$3,337,304	\$3,687,594	10.5%	\$3,552,486	\$3,321,366	-6.5%
Other Sightseeing/Attractions	\$1,411,699	\$1,883,023	33.4%	\$1,361,770	\$5,028,121	269.2%
Sport Fees	\$2,115,222	\$1,730,002	-18.2%	\$878,070	\$3,092,400	252.2%
Historic/Cultural Site Admissions	\$1,236,506	\$1,371,075	10.9%	\$1,698,484	\$2,560,701	50.8%
Other Evening Entertainment	\$878,947	\$1,201,212	36.7%	\$1,298,940	\$2,760,057	112.5%
Popular Events Admissions	\$447,575	\$825,908	84.5%	\$1,391,626	\$683,270	-50.9%
Gaming	\$579,940	\$129,618	-77.6%	\$365,647	\$514,431	40.7%
All Other	\$490,336	\$707,105	44.2%	\$548,004	\$1,298,732	137.0%



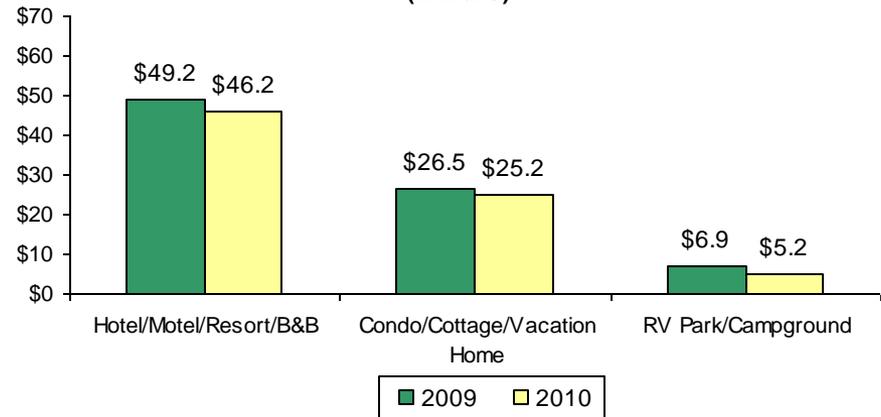
Total Visitor Expenditures by Lodging Type

August Total Expenditures by Lodging Type					
	2009	2010	% Change	2009	2010
TOTAL	\$130,153,697	\$166,842,461	28.2%	100%	100%
Visiting Friends & Relatives/Day Trippers	\$47,585,928	\$90,363,468	89.9%	37%	54%
Paid Accommodations	\$82,567,769	\$76,478,993	-7.4%	63%	46%
<i>Hotel/Motel/Resort/B&B</i>	\$49,225,492	\$46,150,862	-6.2%	38%	28%
<i>Condo/Cottage/Vacation Home</i>	\$26,469,296	\$25,161,670	-4.9%	20%	15%
<i>RV Park/Campground</i>	\$6,872,981	\$5,166,461	-24.8%	5%	3%

Expenditures by Lodging Type
(Millions)



Paid Accommodations Expenditures by Lodging Type
(Millions)





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.



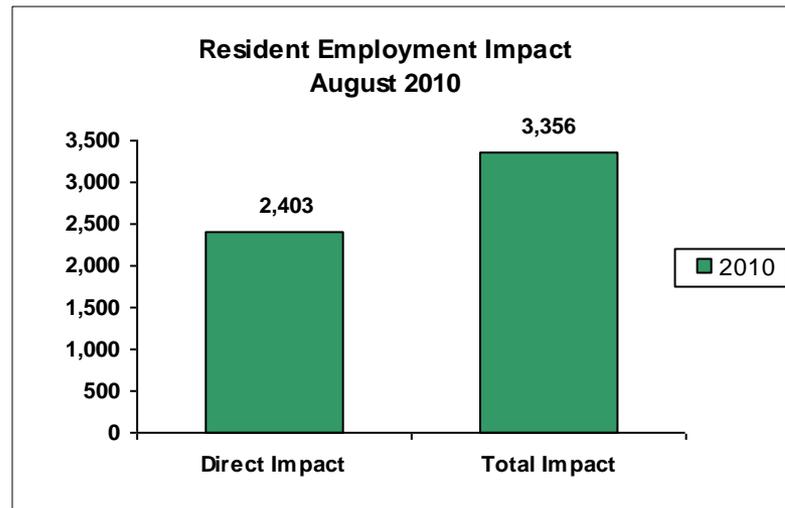
Impact on Jobs for Lee County Residents

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.).





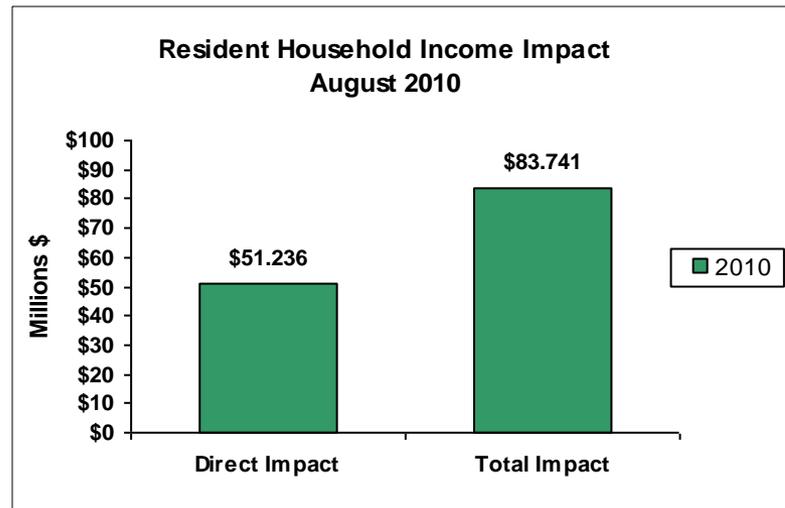
Impact on Household Income for Lee County Residents

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.

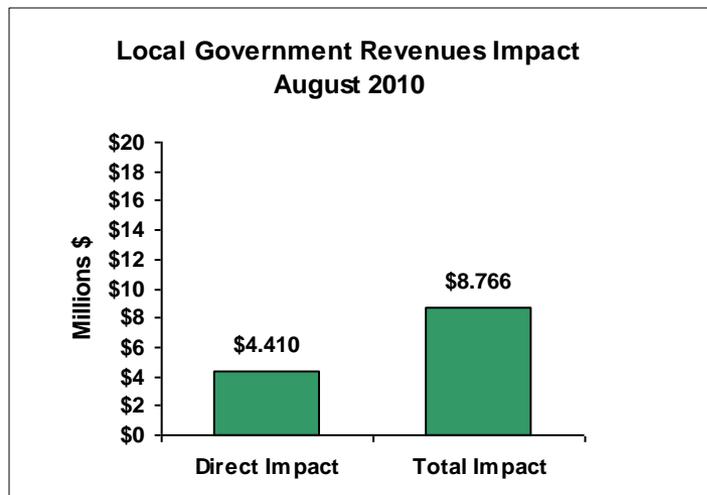
The gross government revenues accruing to governments as a result of producing the output purchased with visitor expenditures is the government revenue impact.

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.

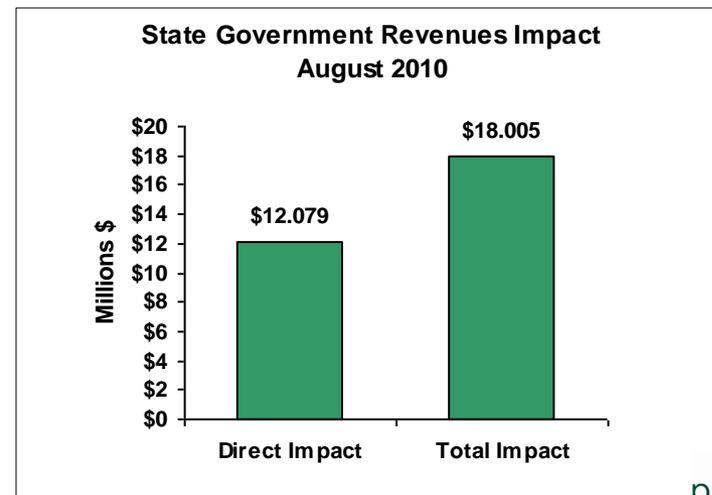
State government revenue impact is a result of revenues provided to the Florida state government. This includes sales tax and any operating income for state government agencies.

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).



August 2010



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Appendix August 2010



August 2010 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews*
Sanibel	Loggerhead cay	3-Aug	6
Sanibel	Sanibel Inn	3-Aug	6
Sanibel	Sanibel Mooring	3-Aug	3
Sanibel	Sundial Beach Resort	3-Aug	8
Sanibel	Tortuga Beach Club	3-Aug	4
Bonita Springs	Bonita Beach	7-Aug	23
Fort Myers Beach	Diamondhead Resort	13-Aug	9
Fort Myers Beach	Estero Island Beach Club	13-Aug	7
Fort Myers Beach	Neptune Inn	13-Aug	5
Fort Myers Beach	Red Coconut RV	13-Aug	6
Sanibel	Holiday Inn	16-Aug	6
Sanibel	Lighthouse Beach	16-Aug	16
Sanibel	Sanibel Beach Club	16-Aug	5
Sanibel	Sanibel Surfside	16-Aug	4
Ft. Myers	Centennial Park	17-Aug	6
Ft. Myers	Edison Estate	17-Aug	16
Cape Coral	Cape Coral Yacht Club	20-Aug	10
Fort Myers Beach	Bowditch Beach	25-Aug	8
Fort Myers Beach	Pink Shell Resort	25-Aug	6
Fort Myers Beach	Times Square	25-Aug	13
Ft. Myers	Clarion	25-Aug	6
Ft. Myers	Best Western	28-Aug	7
Ft. Myers	Edison Estate	28-Aug	10
N. Ft. Myers	Shell Factory	28-Aug	10
TOTAL			200



Occupancy Interviewing Statistics

Interviews were conducted from August 1 – August 15, 2010. Information was provided by 132 Lee County lodging properties.

Lodging Type	Number of Interviews
Hotel/Motel/Resort/B&Bs	77
Condo/Cottage/Vacation Home/Timeshare	36
RV Park/Campground	19
Total	132