



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

**December 2009 Visitor Profile and Occupancy Analysis  
February 5, 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

### December 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 December 2009, and about 200,000 staying with friends or relatives while visiting, for a total of 395,921 visitors.
- Visitation among those staying in paid accommodations increased 21.2% from December 2008 to December 2009. However, visitation decreased among those staying with friends and relatives (-27.9%). As a result, total visitation was down somewhat (-9.7%) year-over-year. For the calendar year, 2009 total visitation was on par with the prior year (-0.9%).
- Three-quarters of December 2009 visitors staying in paid accommodations were U.S. residents (74%), the same proportion as last month and just slightly higher than December 2008 (65%). Canada, Germany, and the UK contributed the largest share of international visitors staying in paid accommodations (8%, 7%, and 5% respectively) during December 2009.
- About half of domestic visitors staying in paid accommodations during December 2009 were from the Midwest (48%) followed by the Northeast (26%), South (17%), and West (6%). The New York DMA delivered the largest share of domestic visitors (11%) with Chicago (7%) and Indianapolis (6%) as a distant second and third.

### Visitor Expenditures

- The average per person per day expenditure was \$114.63 in December 2009 – a 4.3% decline from December 2008 (\$119.83). Although a decline year-over-year, the December 2009 average expenditure was higher than that observed in November 2009 (\$109.63).
- Total visitor expenditures for December 2009 are estimated at \$233 million, a 26.9% drop from \$319 million in December 2008 (note: December 2008 was up 14.9% versus the prior year). From December 2008 to December 2009, expenditures decreased 21.6% among those staying in paid accommodations and 32.6% among those staying with friends and relatives. For the calendar year, estimated total expenditures are down 10%.



<b>Total December Visitation</b>					
	<b>%</b>		<b>Visitor Estimates</b>		<b>% Change</b>
	<b>2008</b>	<b>2009</b>	<b>2008</b>	<b>2009</b>	<b>2008-2009</b>
Paid Accommodations	37%	50%	162,465	196,862	21.2%
Friends/Relatives	63%	50%	276,107	199,059	-27.9%
<i>Total Visitation</i>			438,572	395,921	-9.7%
<b>December Visitor Origin - Visitors Staying in Paid Accommodations</b>					
	<b>2008</b>	<b>2009</b>	<b>2008</b>	<b>2009</b>	
United States	65%	74%	105,124	145,973	38.9%
Canada	7%	8%	10,922	16,070	47.1%
Germany	11%	7%	17,748	13,392	-24.5%
UK	9%	5%	15,018	9,374	-37.6%
Austria	1%	1%	1,365	2,678	96.2%
BeNeLux	1%	1%	1,365	2,678	96.2%
France	1%	1%	1,365	1,339	-1.9%
Ireland	1%	1%	1,365	1,339	-1.9%
Scandinavia	2%	1%	2,731	1,339	-51.0%
Switzerland	2%	1%	2,731	1,339	-51.0%
Other	1%	1%	1,365	1,339	-1.9%
<b>U.S. Region (Paid Accommodations)</b>					
	<b>2008</b>	<b>2009</b>	<b>2008</b>	<b>2009</b>	
Florida	5%	8%	5,461	12,053	120.7%
South (including Florida)	17%	17%	17,748	25,445	43.4%
Midwest	40%	48%	42,323	69,638	64.5%
Northeast	14%	26%	15,018	37,498	149.7%
West	1%	6%	1,365	8,035	488.6%
No Answer	26%	4%	27,305	5,357	-80.4%

<b>2009 Top DMAs (Paid Accommodations)</b>		
New York	11%	15,790
Chicago	7%	10,482
Indianapolis	6%	9,294
Philadelphia	5%	6,574
Atlanta	4%	5,417
Minneapolis-Saint Paul	4%	5,356
Milwaukee	4%	5,302



### Trip Planning

- Eighty-five percent of December 2009 visitors said they had reserved accommodations before leaving home. In contrast, a significantly lower proportion of December 2008 visitors claimed the same (68%). Likewise, December 2009 visitors were more likely to use hotel web sites while planning their Lee County trip (31% vs. 21% December 2008), and not surprisingly, this discrepancy was more dramatic among those who stayed in Lee County paid accommodations.
- When deciding to visit Lee County, December 2009 visitors were more likely than December 2008 visitors to say the following attributes influenced their selection:
  - Reasonably priced lodging (62% vs. 52%)
  - A “family” atmosphere (62% vs. 53%)
  - Upscale accommodations (57% vs. 41%)

### Visitor Profile

- Same as last December, the majority of Lee County visitors were repeat visitors (80%). Among repeat visitors, the average number of visits to Lee County in the past five years was 5.1 (about one trip per year).
- About half of December 2009 visitors indicated they were staying in a hotel/motel/resort/B&B (47%) compared with only one-third last December (30%). A sizable minority said they stayed in a condo/vacation home (38%) and one in ten at the home of a friend or family member (13%). Slightly fewer than half felt that the quality of accommodations far exceeded or exceeded their expectations (44%) in December 2009.
- The top activities enjoyed while in Lee County during December 2009 were beaches, relaxing, dining out, shopping, and swimming. December 2009 visitors were more likely to go shelling than those in December 2008 (45% vs. 36%).
- Overall, visitor satisfaction remains extremely high, with 97% of December 2009 visitors reporting being very satisfied or satisfied with their visit, and in particular, there was significant increase in the proportion of very satisfied visitors (72% vs. 59% December 2008). The vast majority indicated they were likely to return to Lee County (93%), and two-thirds of them are likely to return next year (65%).



- The least liked features about the Lee County area among December 2009 visitors were traffic (23%) and insects (17%). Visitors' concerns about Red Tide were less prevalent during December 2009 than during the prior year (3% vs. 12%).
- The demographic composition of December 2009 visitors was generally similar to that of December 2008 visitors. December 2009 visitors averaged 51 years of age with an average household income of approximately \$100,000. The majority of visitors were married (76%) and only a minority were traveling with children (28%). The average travel party size was 3.2 people.



### Lodging Property Manager Assessments

- For the Lee County lodging industry in total, the number of available room nights and occupied room nights were higher in December 2009 than in December 2008 (+7.1% and +4.4% respectively). Hotel/motel/resort available room nights were up 17.6% from a year ago and occupied room nights were up substantially as well (+11.5%). Condo/vacation home properties saw a decline in available and occupied room nights while RV park/campground properties saw an increase.

	Occupied Room Nights			Available Room Nights		
	2008	2009	% Change	2008	2009	% Change
Hotel/Motel/Resort/B&B	149,227	166,436	11.5%	313,067	368,081	17.6%
Condo/Cottage/Vacation Home	85,567	77,002	-10.0%	169,539	155,282	-8.4%
RV Park/Campground	99,119	105,282	6.2%	151,187	155,682	3.0%
<b>Total</b>	<b>333,913</b>	<b>348,720</b>	<b>4.4%</b>	<b>633,793</b>	<b>679,045</b>	<b>7.1%</b>

- Average occupancy rates decreased from 52.7% in December 2008 to an average of 51.4% in December 2009 (-2.7%). The increase in inventory for hotels/motels/resorts caused occupancy rates to decline somewhat (-5.2%), despite increased demand. Occupancy rates for condos/cottages decreased slightly as well (-1.8%) but increased for RV parks/campgrounds (+3.1%).
- Overall average daily rates dropped from \$119.27 to \$106.17 year-over-year (-11.0%). ADR decreased for hotel/motel/resort and RV park/campground properties but increased for condo/vacation home properties.
- RevPAR was down 13.2% from December 2008 driven by decreases for hotels/motels/resorts (-24.1%) and RV parks/campgrounds. (-7.9%).

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2008	2009	% Change	2008	2009	% Change	2008	2009	% Change
Property Managers Responding	149	143		148	143		149/148	143/143	
Hotel/Motel/Resort/B&B	47.7%	45.2%	-5.2%	\$132.61	\$106.13	-20.0%	\$63.21	\$47.99	-24.1%
Condo/Cottage/Vacation Home	50.5%	49.6%	-1.8%	\$179.02	\$193.27	8.0%	\$90.35	\$95.84	6.1%
RV Park/Campground	65.6%	67.6%	3.1%	\$47.61	\$42.51	-10.7%	\$31.21	\$28.75	-7.9%
<b>AVERAGE</b>	<b>52.7%</b>	<b>51.4%</b>	<b>-2.7%</b>	<b>\$119.27</b>	<b>\$106.17</b>	<b>-11.0%</b>	<b>\$62.84</b>	<b>\$54.52</b>	<b>-13.2%</b>



- Property managers in December 2009 were no more negative than they had been in December 2008 when comparing their current month's occupancy and revenue year-over-year. Fully half reported their December 2009 occupancy was the same or better than the prior year (53% vs. 50% December 2008). Similarly, half reported their revenue was the same or better than the prior year (50% vs. 50% December 2008).
- Projections for the next three months (January – March) remain low. Only four property managers in ten reported that their total level of reservations for the next three months are the same or better than the same period the prior year (41%), while slightly more than half (56%) reported that their reservations are down.



## December 2009 Lee County Snapshot

Total December Visitation				
	%		Visitor Estimates	
	2008	2009	2008	2009
Paid Accommodations	37%	50%	162,465	196,862
Friends/Relatives	63%	50%	276,107	199,059
Total Visitation			438,572	395,921
December Visitor Origin - Visitors Staying in Paid Accommodations				
	%		Visitor Estimates	
	2008	2009	2008	2009
Florida	5%	8%	5,461	12,053
United States	65%	74%	105,124	145,973
Canada	7%	8%	10,922	16,070
Germany	11%	7%	17,748	13,392
UK	9%	5%	15,018	9,374
Austria	1%	1%	1,365	2,678
BeNeLux	1%	1%	1,365	2,678
France	1%	1%	1,365	1,339
Ireland	1%	1%	1,365	1,339
Scandinavia	2%	1%	2,731	1,339
Switzerland	2%	1%	2,731	1,339
Other	1%	1%	1,365	1,339

Total Visitor Expenditures			
	2008	2009	% Change
Total Visitor Expenditures	\$319,027,567	\$233,357,345	-26.9%
Paid Accommodations	\$165,379,570	\$129,719,177	-21.6%

Average Per Person Per Day Expenditures		
2008	2009	% Change
\$119.83	\$114.63	-4.3%

First-Time/Repeat Visitors to Lee County		
	2008	2009
First-time	16%	20%
Repeat	82%	80%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2008	2009	% Change	2008	2009	% Change	2008	2009	% Change
Property Managers Responding	149	143		148	143		149/148	143/143	
Hotel/Motel/Resort/B&B	47.7%	45.2%	-5.2%	\$132.61	\$106.13	-20.0%	\$63.21	\$47.99	-24.1%
Condo/Cottage/Vacation Home	50.5%	49.6%	-1.8%	\$179.02	\$193.27	8.0%	\$90.35	\$95.84	6.1%
RV Park/Campground	65.6%	67.6%	3.1%	\$47.61	\$42.51	-10.7%	\$31.21	\$28.75	-7.9%
AVERAGE	52.7%	51.4%	-2.7%	\$119.27	\$106.17	-11.0%	\$62.84	\$54.52	-13.2%



## Visitor Profile Analysis December 2009

*A total of 203 interviews were conducted with visitors in Lee County during the month of December 2009. 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 209 interviews were conducted with visitors in Lee County during the month of December 2008. A total sample of this size is considered accurate to plus or minus 6.8 percentage points at the 95% confidence level.*

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



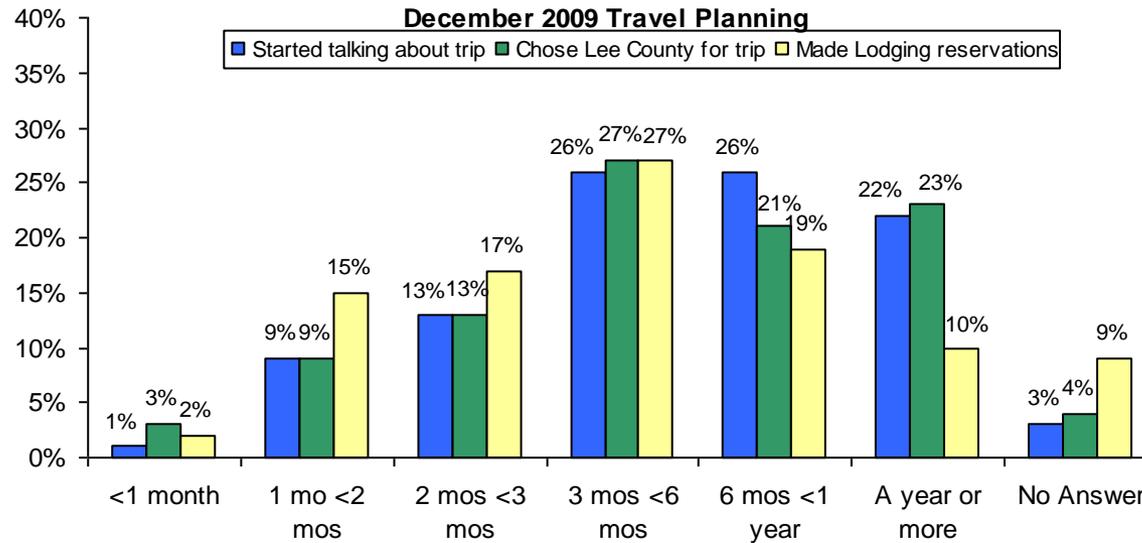
## Travel Planning

	Started Talking About Trip		Chose Lee County for Trip		Made Lodging Reservations	
	2008	2009	2008	2009	2008	2009
Total Respondents	209	203	209	203	209	203
<1 month	1%	1%	4%	3%	<8%>	2%
1 mo - < 2 mos	12%	9%	14%	9%	10%	15%
2 mos - < 3 mos	10%	13%	12%	13%	11%	17%
3 mos - < 6 mos	30%	26%	27%	27%	26%	27%
6 mos - <1 year	27%	26%	22%	21%	19%	19%
A year or more	18%	22%	16%	23%	7%	10%
No answer	1%	3%	5%	4%	<18%>	9%

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 Accomodations		
	December	
	2008	2009
Total Respondents	209	203
Before leaving home	68%	<85%>
After arriving in Florida	7%	6%
No Answer	24%	9%

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

Computer Access		
	December	
	2008	2009
Total Respondents	209	203
<u>Yes</u>	<u>86%</u>	<u>&lt;92%&gt;</u>
<i>Home</i>	29%	22%
<i>Work</i>	2%	1%
<i>Both Home and Work</i>	54%	<69%>
<u>No</u>	<u>11%</u>	<u>8%</u>

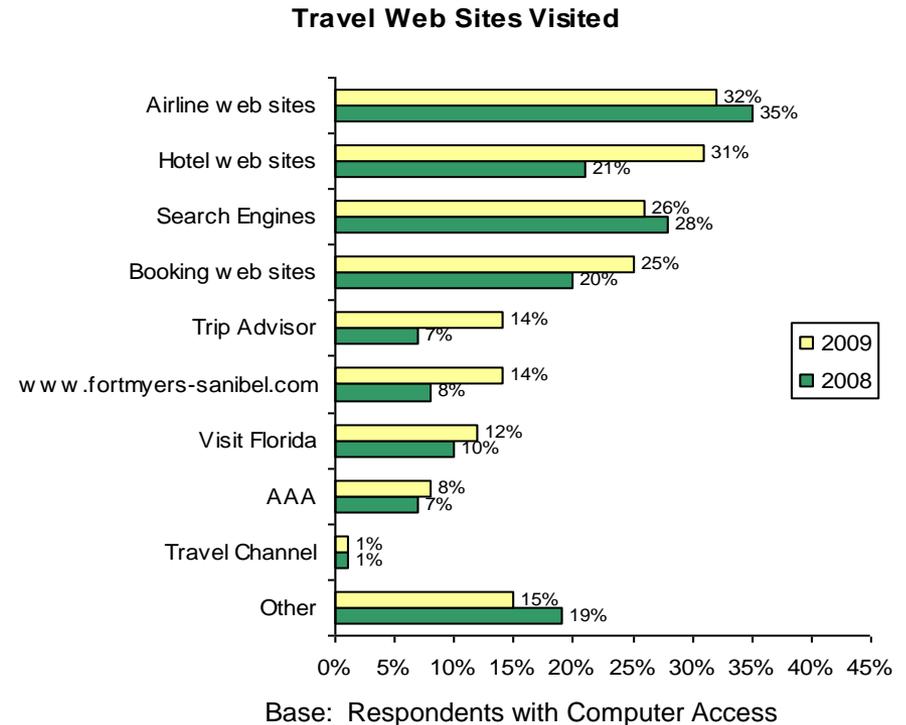
Q8: Do you have access to a computer?



## Travel Planning

Travel Web Sites Visited by December Travelers		
	2008	2009
<b>Total Respondents with computer access</b>	<b>179</b>	<b>187</b>
Visited web sites (net)	78%	69%
Airline web sites	35%	32%
Hotel web sites	21%	<31%>
Search Engines	28%	26%
Booking web sites	20%	25%
Trip Advisor	7%	<14%>
www.fortmyers-sanibel.com	8%	14%
Visit Florida	10%	12%
AAA	7%	8%
Travel Channel	1%	1%
Other	19%	15%
Did not visit web sites	18%	26%
No Answer	4%	5%

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



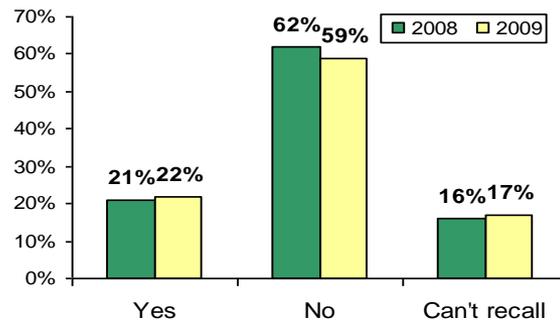


## Travel Planning

December Travelers Requesting Information		
	2008	2009
Total Respondents	209	203
Requested information (net)	<u>29%</u>	<u>35%</u>
Hotel Web Site	14%	18%
VCB Web Site	2%	<9%>
Call hotel	6%	8%
Visitor Guide	3%	6%
Call local Chamber of Commerce	1%	2%
Clipping/mailling coupon	1%	-
Other	9%	11%
Did not request information	<u>58%</u>	<u>55%</u>
No Answer	13%	11%

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	209	203
Yes	7%	5%
No	91%	93%

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

Travel Agent Influence		
	2008	2009
Total Respondents	209	203
Yes	21%	22%
No	62%	59%
Can't recall	16%	17%

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

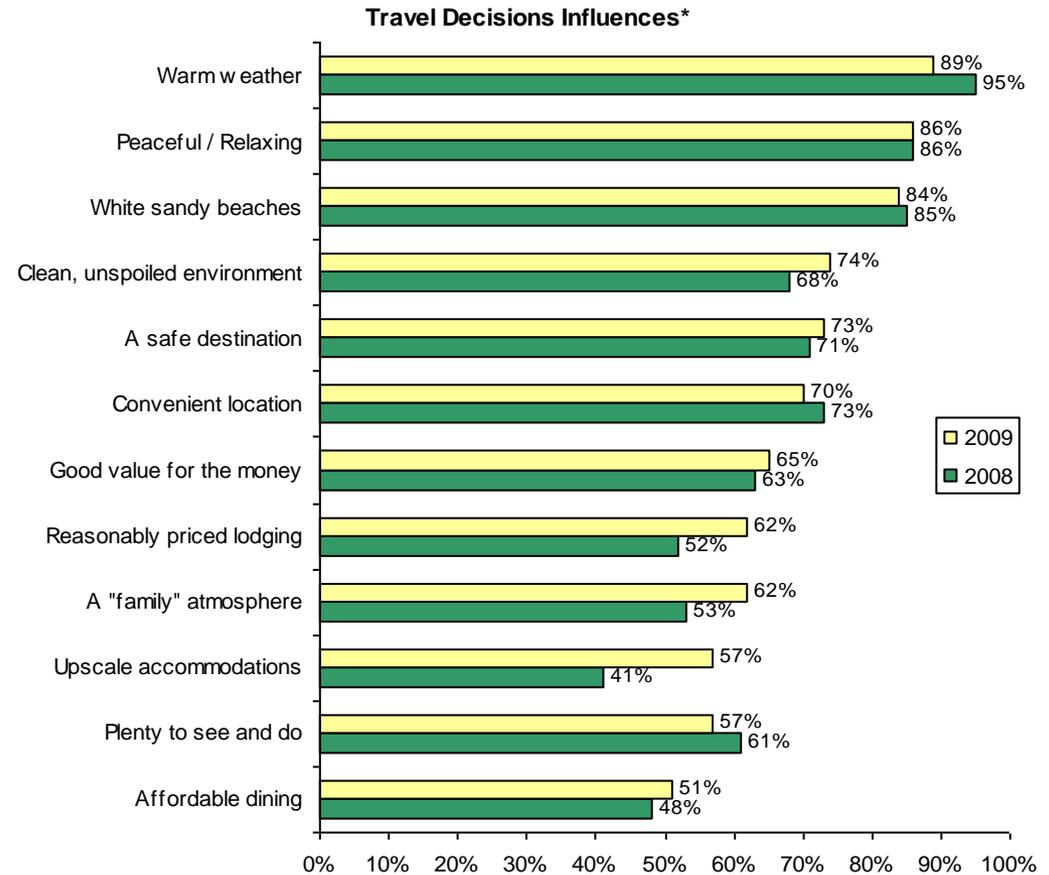


## Travel Planning

December Travel Decision Influences*		
	2008	2009
Total Respondents	209	203
Warm weather	<95%>	89%
Peaceful / Relaxing	86%	86%
White sandy beaches	85%	84%
Clean, unspoiled environment	68%	74%
A safe destination	71%	73%
Convenient location	73%	70%
Good value for the money	63%	65%
Reasonably priced lodging	52%	<62%>
A "family" atmosphere	53%	<62%>
Upscale accommodations	41%	<57%>
Plenty to see and do	61%	57%
Affordable dining	48%	51%

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

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





## Trip Profile

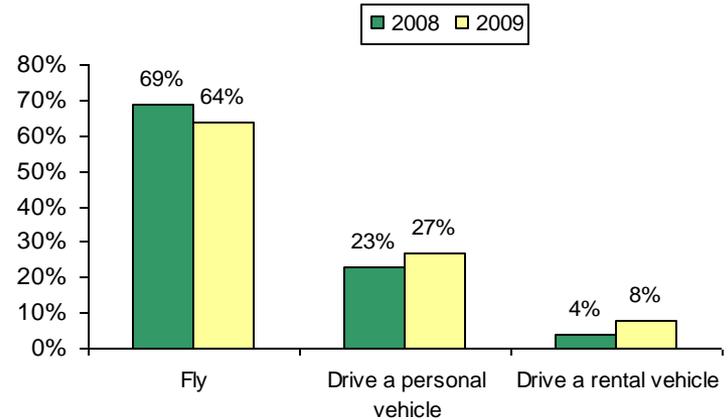
Mode of Transportation		
	2008	2009
Total Respondents	209	203
Fly	69%	64%
Drive a personal vehicle	23%	27%
Drive a rental vehicle	4%	8%
Drive an RV	3%	1%
Travel by bus	-	1%
Other/No Answer	<1%	-

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

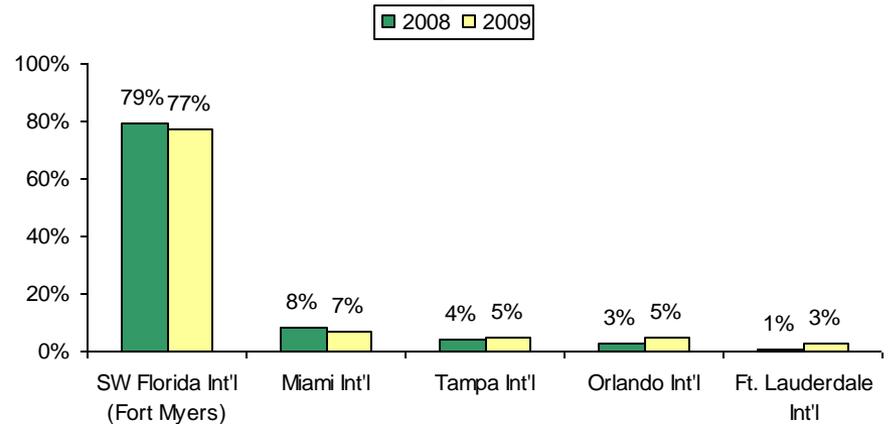
Airport		
	2008	2009
Total Respondents who Arrived by Air	145	129
SW Florida Int'l (Fort Myers)	79%	77%
Miami Int'l	8%	7%
Tampa Int'l	4%	5%
Orlando Int'l	3%	5%
Ft. Lauderdale Int'l	1%	3%
West Palm Beach Int'l	1%	-
Sarasota / Bradenton	1%	-
Other/No Answer	2%	3%

Q2: At which Florida airport did you land?

### Mode of Transportation



### Airport

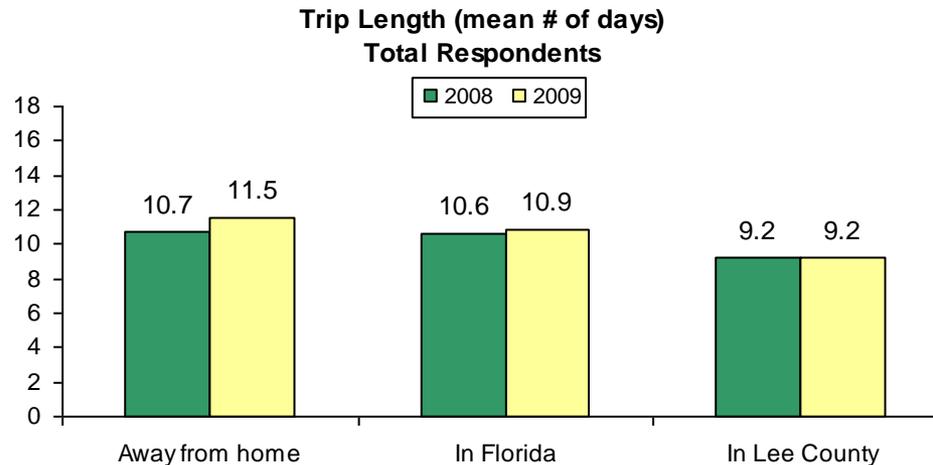




## Trip Profile

December Trip Length Mean # of Days			
	Total Respondents		
	2008	2009	% Change
Total Respondents	209	203	
Away from home	10.7	11.5	7.5%
In Florida	10.6	10.9	2.8%
In Lee County	9.2	9.2	0.0%

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





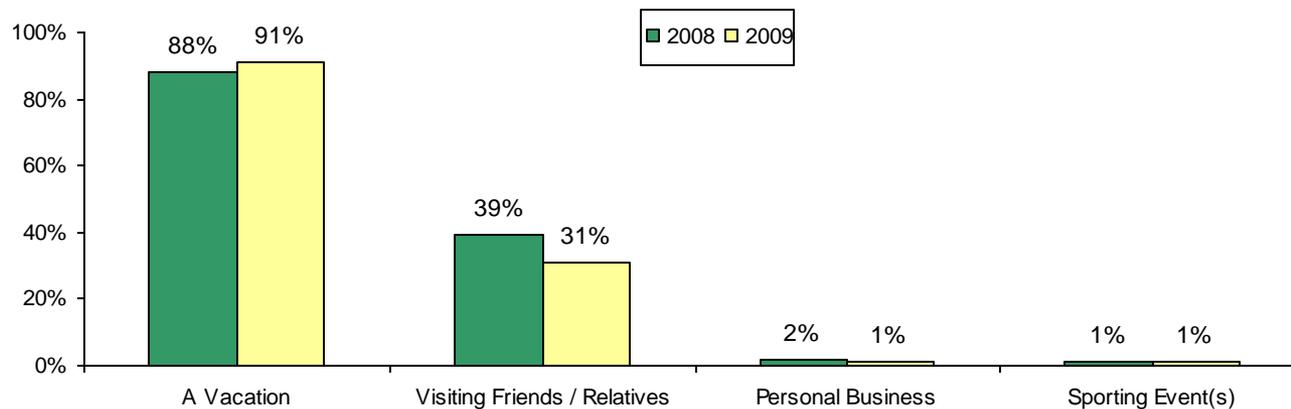
## Trip Profile

Reason for December Visit		
	2008	2009
Total Respondents	209	203
A Vacation	88%	91%
Visiting Friends / Relatives	39%	31%
Personal Business	2%	1%
Sporting Event(s)	1%	1%
Other Business Trip*	<1%	1%
A Convention / Trade Show*	--	1%
A Conference / Meeting*	--	1%
Other/No Answer (net)	2%	1%

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 December Trip





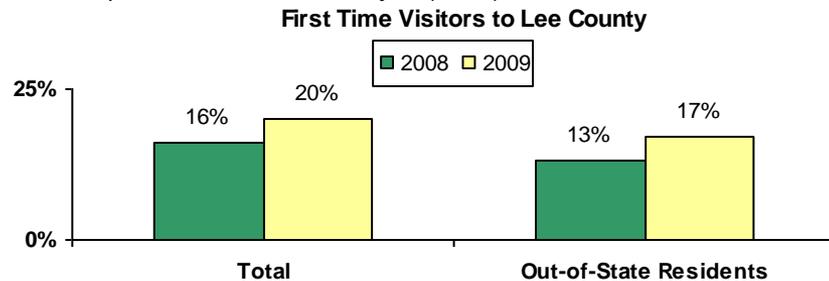
## Trip Profile

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	209	203	5**	10**	114	138	55*	49*
Yes	16%	20%	N/A	N/A	13%	17%	28%	31%
No	82%	80%	N/A	N/A	86%	82%	69%	69%
No Answer	2%	1%	N/A	N/A	1%	1%	2%	-

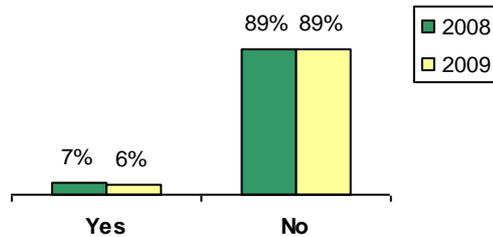
Q20: Is this your first visit to Lee County?

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

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



### First Time Visitors to Florida



First Time Visitors to Florida		
	2008	2009
Total Respondents	209	203
Yes	7%	6%
No	89%	89%
No answer	2%	1%
<i>FL Residents*</i>	3%	5%

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.



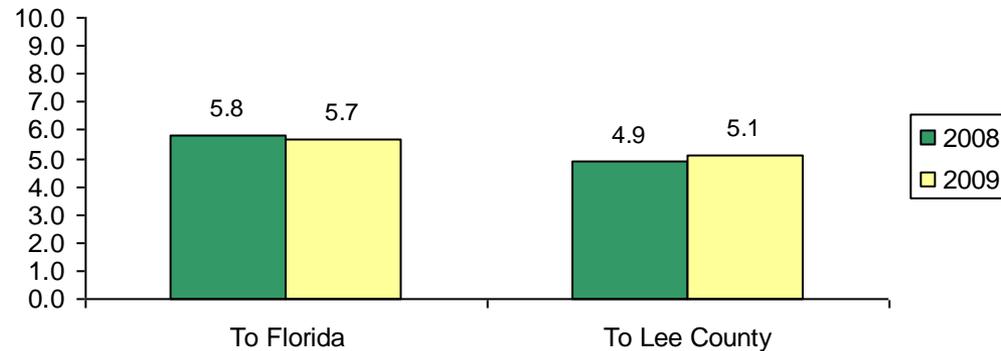
## Trip Profile

Previous Visits in Five Years				
	Mean # of Visits to Florida		Mean # of Visits to Lee County	
	2008	2009	2008	2009
Base: Repeat Visitors	186 (FL res. Excl.)	180 (FL res. Excl.)	171	162
Number of visits	5.8	5.7	4.9	5.1

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

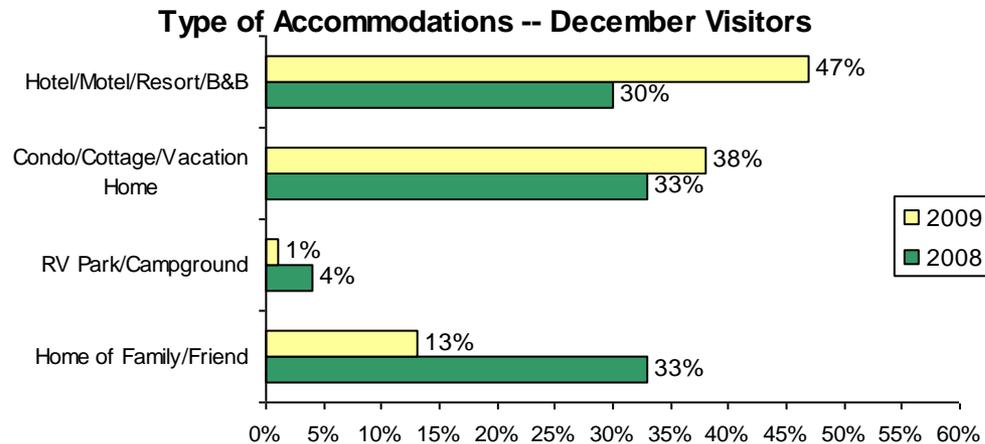




## Trip Profile

Type of Accommodation - December Visitors		
	2008	2009
Total Respondents	209	203
<b>Hotel/Motel/Resort/B&amp;B</b>	<b>30%</b>	<b>&lt;47%&gt;</b>
Hotel/motel/inn	22%	<30%>
Resort	7%	<16%>
B&B	1%	<1%>
<b>Condo/Cottage/Vacation Home</b>	<b>33%</b>	<b>38%</b>
Rented home/condo	24%	24%
Borrowed home/condo	7%	6%
Owned home/condo	2%	<8%>
<b>RV Park/Campground</b>	<b>4%</b>	<b>1%</b>
<b>Home of family/friend</b>	<b>&lt;33%&gt;</b>	<b>13%</b>
<b>Day trip (no accommodations)</b>	<b>1%</b>	<b>1%</b>

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

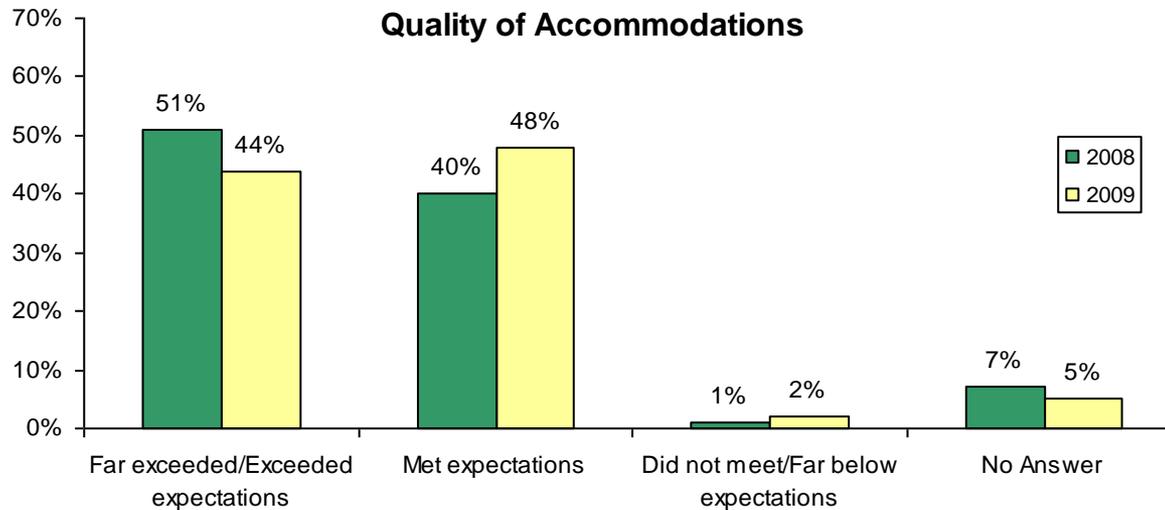




## Trip Profile

Quality of Accommodations		
	2008	2009
Total Respondents	209	203
Far exceeded/Exceeded expectations	51%	44%
Met your expectations	40%	48%
Did not meet/Far below expectations	1%	2%
No Answer	7%	5%

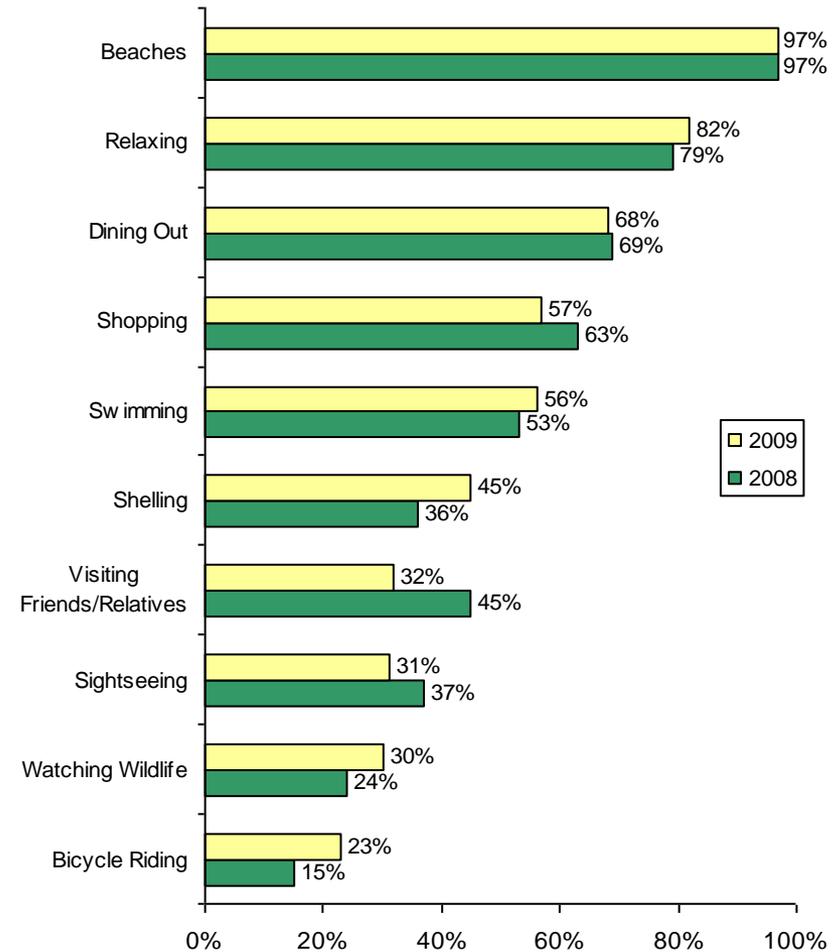
Q26: How would you describe the quality of your accommodations? Do you feel that they:





## Trip Activities

December Activities Enjoyed		
	2008	2009
Total Respondents	209	203
Beaches	97%	97%
Relaxing	79%	82%
Dining Out	69%	68%
Shopping	63%	57%
Swimming	53%	56%
Shelling	36%	<45%>
Visiting Friends/Relatives	<45%>	32%
Sightseeing	37%	31%
Watching Wildlife	24%	30%
Bicycle Riding	15%	23%
Photography	23%	22%
Birdwatching	16%	20%
Exercise / Working Out	18%	18%
Attractions	25%	18%
Golfing	13%	13%
Fishing	12%	12%
Bars / Nightlife	<25%>	11%
Boating	9%	9%
Miniature Golf	9%	8%
Parasailing / Jet Skiing	4%	6%
Cultural Events	5%	5%
Guided Tour	3%	5%
Kayaking / Canoeing	8%	4%
Scuba Diving / Snorkeling	1%	2%
Tennis	6%	2%
Sporting Event	3%	1%
Other	4%	3%

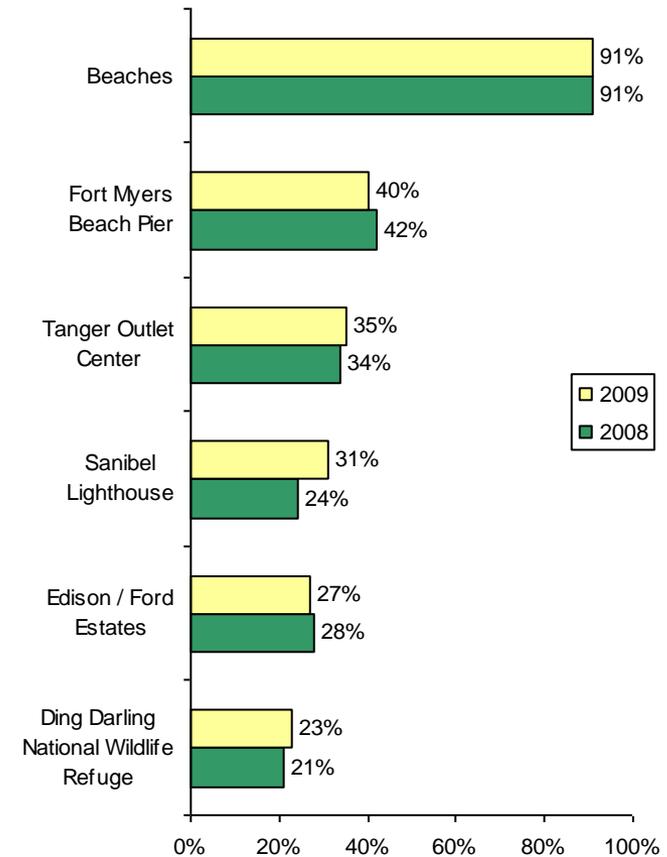


Q28: What activities or interests are you enjoying while in Lee County?  
 (Please mark ALL that apply.)



## Trip Activities

December Attractions Visited		
	2008	2009
Total Respondents	209	203
Beaches	91%	91%
Fort Myers Beach Pier	42%	40%
Tanger Outlet Center	34%	35%
Sanibel Lighthouse	24%	31%
Edison / Ford Estates	28%	27%
Ding Darling National Wildlife Refuge	21%	23%
Periwinkle Place	14%	20%
Miromar Outlets Mall	<29%>	18%
Bell Tower Shops	15%	15%
Shell Factory and Nature Park	12%	13%
Edison Mall	<20%>	9%
Coconut Point Mall	<15%>	8%
Gulf Coast Town Center	9%	5%
Bailey-Matthews Shell Museum	1%	4%
Manatee Park	5%	3%
Broadway Palm Dinner Theater	1%	1%
Barbara B. Mann Performing Arts Hall	2%	1%
Babcock Wilderness Adventures	2%	<1%
Other	8%	4%
None/No Answer	1%	1%



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

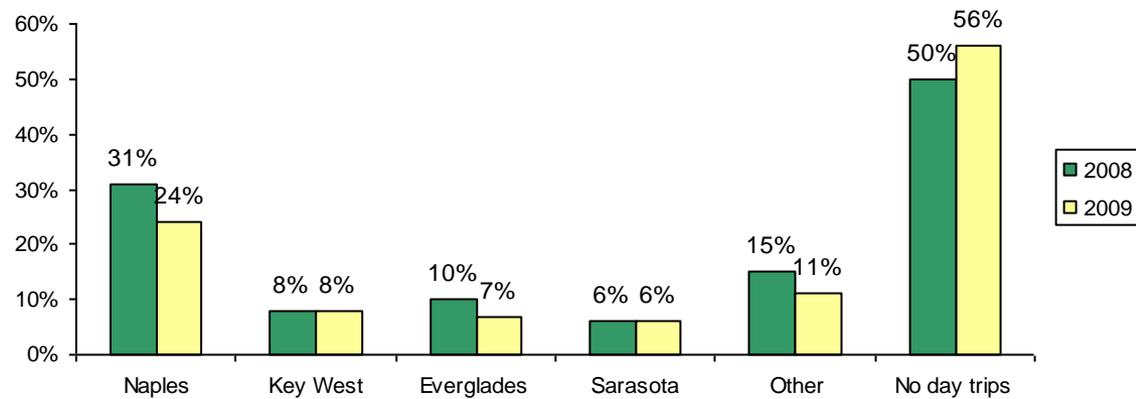


## Trip Activities

December Day Trips Outside Lee County		
	2008	2009
<b>Total Respondents</b>	<b>209</b>	<b>203</b>
<u>Any Day Trips (net)</u>	<u>47%</u>	<u>39%</u>
<i>Naples</i>	31%	24%
<i>Key West</i>	8%	8%
<i>Everglades</i>	10%	7%
<i>Sarasota</i>	6%	6%
<i>Other</i>	15%	11%
<u>No day trips</u>	<u>50%</u>	<u>56%</u>
No Answer	4%	4%

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

### December Day Trips Outside Lee County



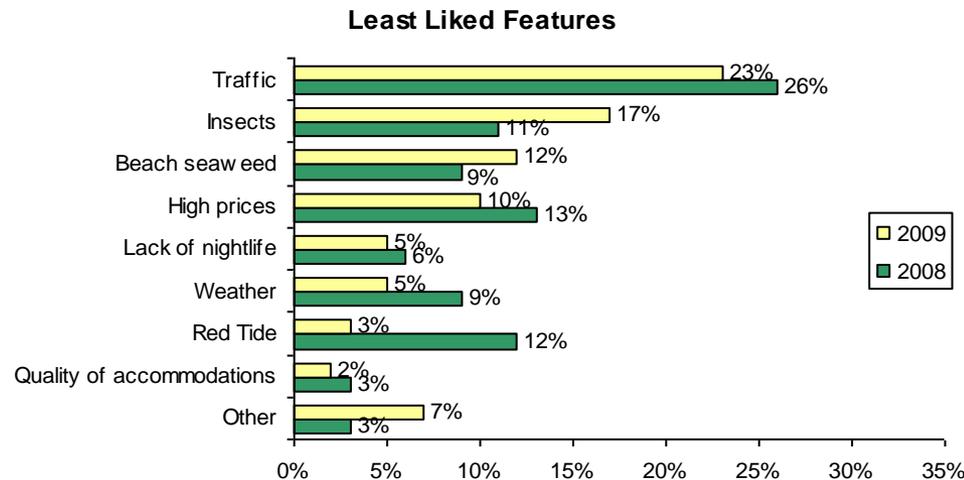


## Trip Activities

Least Liked Features		
	2008	2009
Total Respondents	209	203
Traffic	26%	23%
Insects	11%	17%
Beach seaweed	9%	12%
High prices	13%	10%
Lack of nightlife	6%	5%
Weather	9%	5%
Red Tide	<12%>	3%
Quality of accommodations	3%	2%
Other	3%	<7%>
Nothing/No Answer	39%	40%

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

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

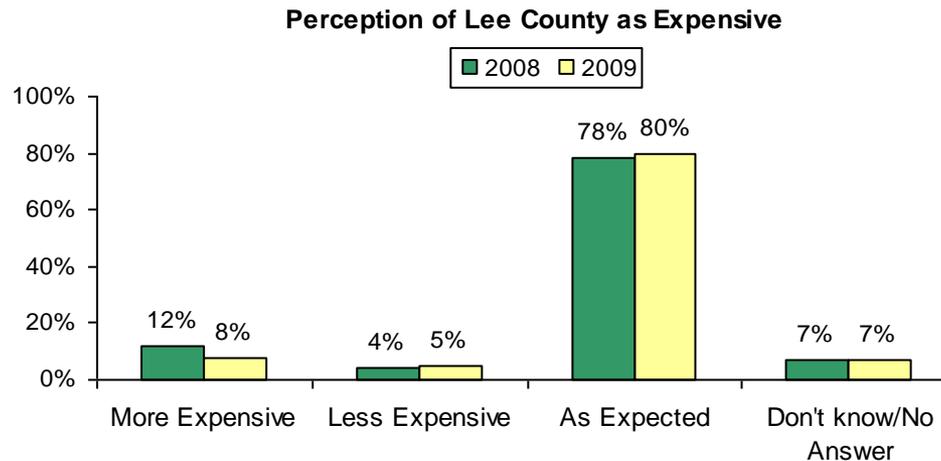




## Lee County Experience

Perception of Lee County as Expensive		
	2008	2009
Total Respondents	209	203
More Expensive	12%	8%
Less Expensive	4%	5%
As Expected	78%	80%
Don't know/No Answer	7%	7%

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



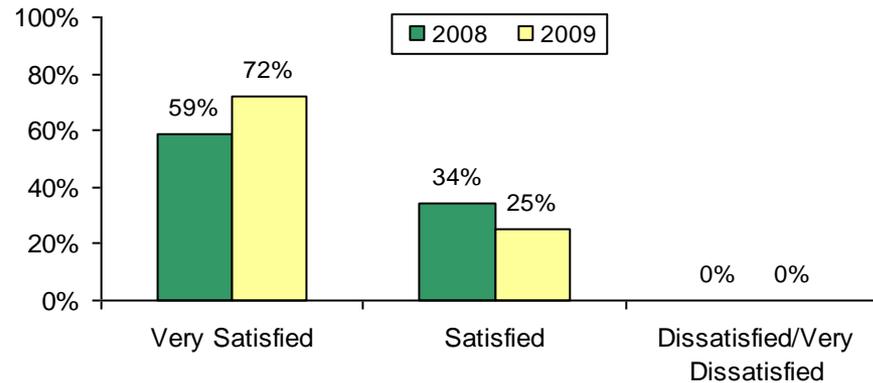


## Lee County Experience

Satisfaction with Visit		
	2008	2009
<b>Total Respondents</b>	<b>209</b>	<b>203</b>
<u>Satisfied</u>	<u>93%</u>	<u>97%</u>
<i>Very Satisfied</i>	59%	<72%>
<i>Satisfied</i>	<34%>	25%
Neither	0%	1%
Dissatisfied/Very Dissatisfied	--	--
Don't know/no answer	<6%>	2%

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

### Satisfaction with Visit





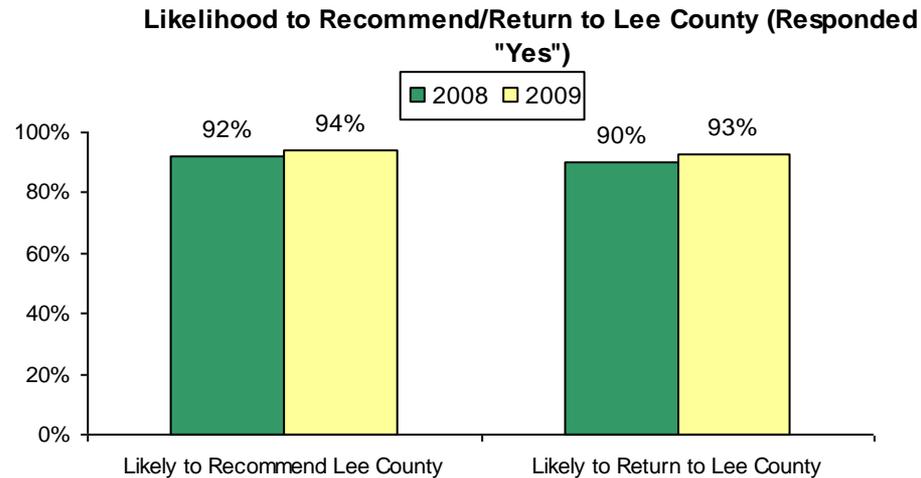
## Future Plans

Likelihood to Recommend/Return to Lee County		
	2008	2009
Total Respondents	209	203
Likely to Recommend Lee County	92%	94%
Likely to Return to Lee County	90%	93%
Base: Total Respondents Planning to Return	189	188
Likely to Return Next Year	62%	65%

Q32: Would you recommend Lee County to a friend?

Q35: Will you come back to Lee County?

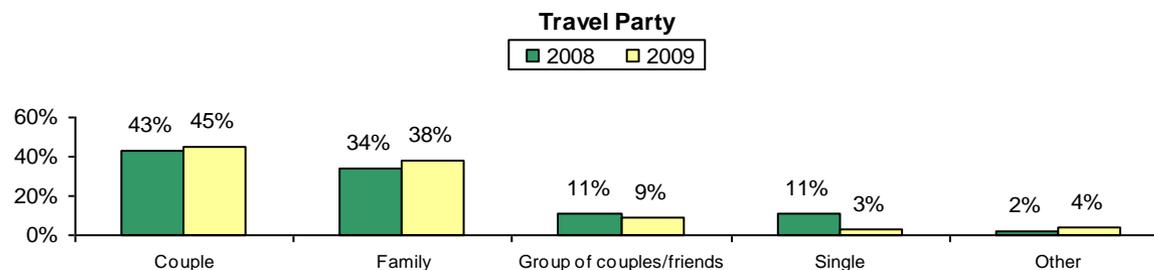
Q36: Will you come back next year?





## Visitor and Travel Party Demographic Profile

December Travel Party		
	2008	2009
Total Respondents	209	203
Couple	43%	45%
Family	34%	38%
Group of couples/friends	11%	9%
Single	<11%>	3%
Other	2%	4%
Mean travel party size	3.3	3.2
Mean adults in travel party	2.6	2.6



Travel Parties with Children		
	2008	2009
Total Respondents	209	203
Traveling with any Children (net)	<u>29%</u>	<u>28%</u>
Any younger than 6	18%	16%
Any 6 - 11 years old	15%	14%
Any 12 - 17 years old	9%	9%

Q22: On this trip, are you traveling:

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

Q24: How many of those people are:

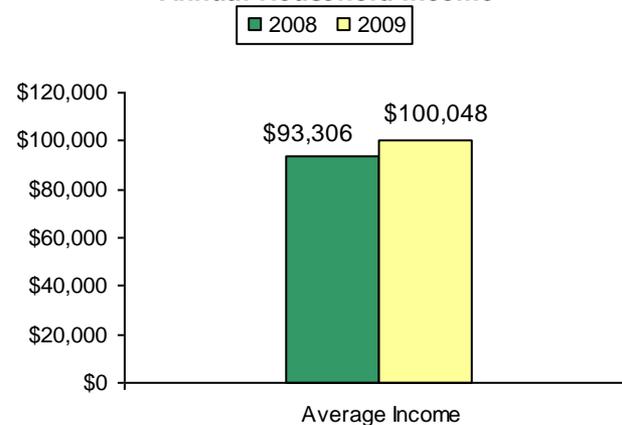
Younger than 6 years old/6-11 years old/12-17 years old/Adults



## Visitor and Travel Party Demographic Profile

December Visitor Demographic Profile		
	2008	2009
Total Respondents	209	203
Vacations per year (mean)	2.7	3.1
Short getaways per year (mean)	4.2	3.7
Age of respondent ( mean)	48.6	51.0
Annual household income (mean)	\$93,306	\$100,048
Marital Status		
Married	71%	76%
Single	15%	11%
Other	13%	11%

**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 December Visitation					
	%		Visitor Estimates		% Change
	2008	2009	2008	2009	2008-2009
Paid Accommodations	37%	50%	162,465	196,862	21.2%
Friends/Relatives	63%	50%	276,107	199,059	-27.9%
<i>Total Visitation</i>			438,572	395,921	-9.7%
December Visitor Origin - Visitors Staying in Paid Accommodations					
	2008	2009	2008	2009	
United States	65%	74%	105,124	145,973	38.9%
Canada	7%	8%	10,922	16,070	47.1%
Germany	11%	7%	17,748	13,392	-24.5%
UK	9%	5%	15,018	9,374	-37.6%
Austria	1%	1%	1,365	2,678	96.2%
BeNeLux	1%	1%	1,365	2,678	96.2%
France	1%	1%	1,365	1,339	-1.9%
Ireland	1%	1%	1,365	1,339	-1.9%
Scandinavia	2%	1%	2,731	1,339	-51.0%
Switzerland	2%	1%	2,731	1,339	-51.0%
Other	1%	1%	1,365	1,339	-1.9%
U.S. Region (Paid Accommodations)					
	2008	2009	2008	2009	
Florida	5%	8%	5,461	12,053	120.7%
South (including Florida)	17%	17%	17,748	25,445	43.4%
Midwest	40%	48%	42,323	69,638	64.5%
Northeast	14%	26%	15,018	37,498	149.7%
West	1%	6%	1,365	8,035	488.6%
No Answer	26%	4%	27,305	5,357	-80.4%

2009 Top DMAs (Paid Accommodations)		
New York	11%	15,790
Chicago	7%	10,482
Indianapolis	6%	9,294
Philadelphia	5%	6,574
Atlanta	4%	5,417
Minneapolis-Saint Paul	4%	5,356
Milwaukee	4%	5,302



## Occupancy Data Analysis December 2009

*Property managers representing 143 properties in Lee County were interviewed for the December 2009 Occupancy Survey between January 1 and January 15, 2009, a sample considered accurate to plus or minus 8.2 percentage points at the 95% confidence level.*

*Property managers representing 149 properties in Lee County were interviewed for the December 2008 Occupancy Survey between January 1 and January 15, 2008, a sample considered accurate to plus or minus 8.0 percentage points at the 95% confidence level.*

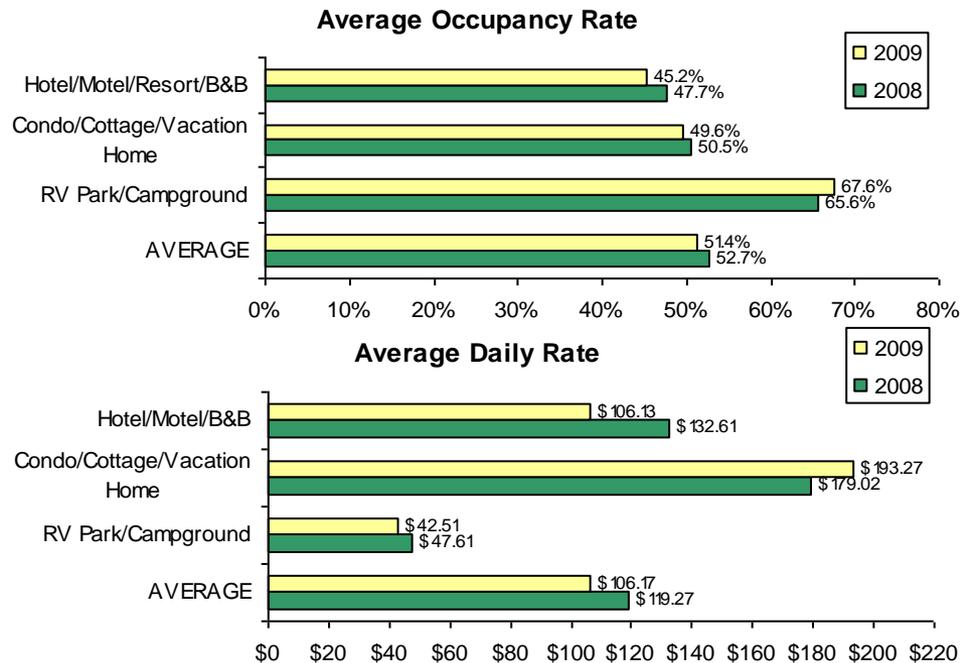


## December Occupancy/Daily Rates

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2008	2009	% Change	2008	2009	% Change	2008	2009	% Change
Property Managers Responding	149	143		148	143		149/148	143/143	
Hotel/Motel/Resort/B&B	47.7%	45.2%	-5.2%	\$132.61	\$106.13	-20.0%	\$63.21	\$47.99	-24.1%
Condo/Cottage/Vacation Home	50.5%	49.6%	-1.8%	\$179.02	\$193.27	8.0%	\$90.35	\$95.84	6.1%
RV Park/Campground	65.6%	67.6%	3.1%	\$47.61	\$42.51	-10.7%	\$31.21	\$28.75	-7.9%
AVERAGE	52.7%	51.4%	-2.7%	\$119.27	\$106.17	-11.0%	\$62.84	\$54.52	-13.2%

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

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

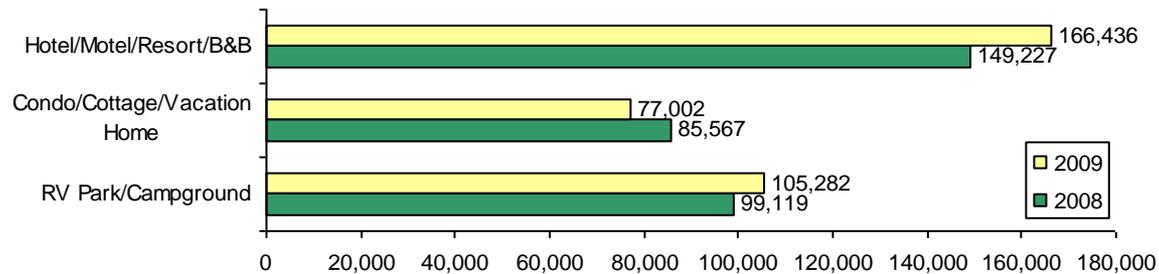




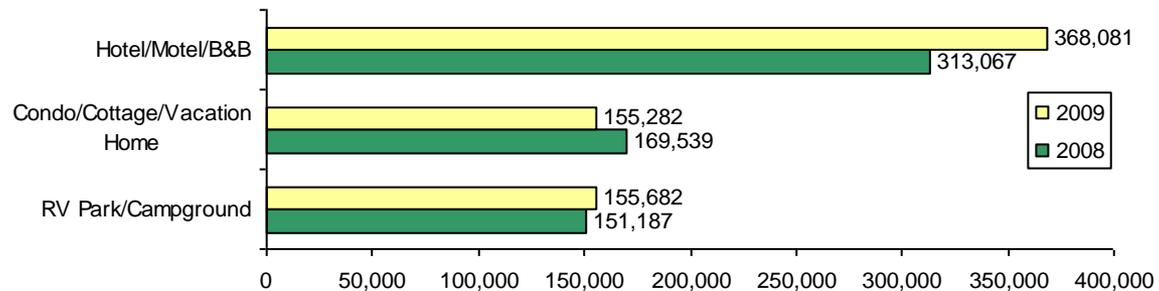
## December Room/Unit/Site Nights

	Occupied Room Nights			Available Room Nights		
	2008	2009	% Change	2008	2009	% Change
Hotel/Motel/Resort/B&B	149,227	166,436	11.5%	313,067	368,081	17.6%
Condo/Cottage/Vacation Home	85,567	77,002	-10.0%	169,539	155,282	-8.4%
RV Park/Campground	99,119	105,282	6.2%	151,187	155,682	3.0%
<b>Total</b>	<b>333,913</b>	<b>348,720</b>	<b>4.4%</b>	<b>633,793</b>	<b>679,045</b>	<b>7.1%</b>

### Occupied Room Nights



### Available Room Nights





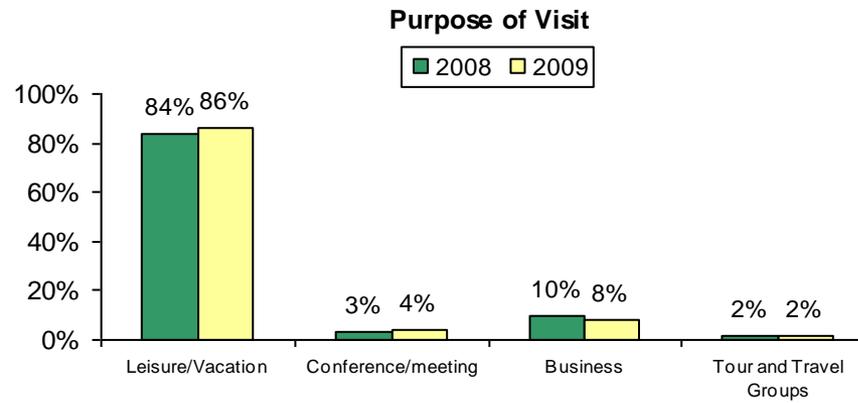
## Lodging Management Estimates

December Guest Profile		
	2008	2009
Property Managers Responding	127	123
<u>Purpose of Visit</u>		
Leisure/Vacation	84%	86%
Conference/meeting	3%	4%
Business	10%	8%
Tour and Travel Groups	2%	2%
Property Managers Responding	142	136
Average guests per room	2.5	2.5
Property Managers Responding	140	132
Average length of stay in nights	7.0	7.0

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

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

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

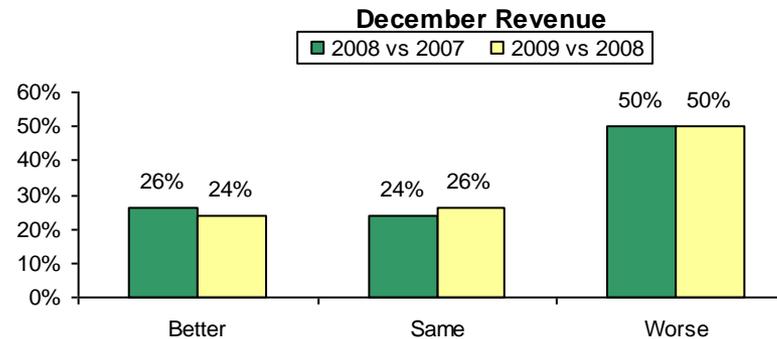
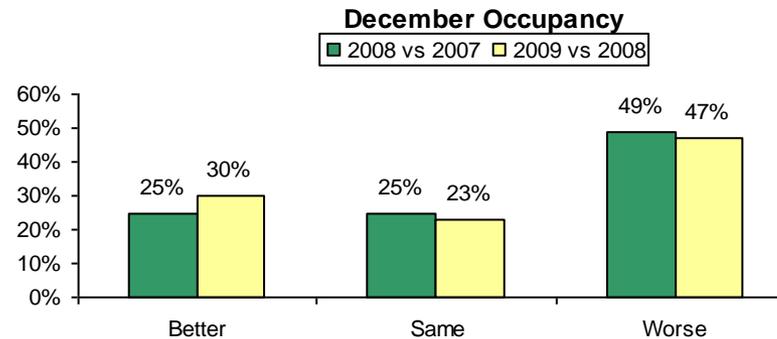




## Occupancy Barometer

	December Occupancy		December Revenue	
	2008	2009	2008	2009
Property Managers Responding	146	139	141	135
Better than prior year	25%	30%	26%	24%
Same as prior year	25%	23%	24%	26%
Worse than prior year	49%	47%	50%	50%

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

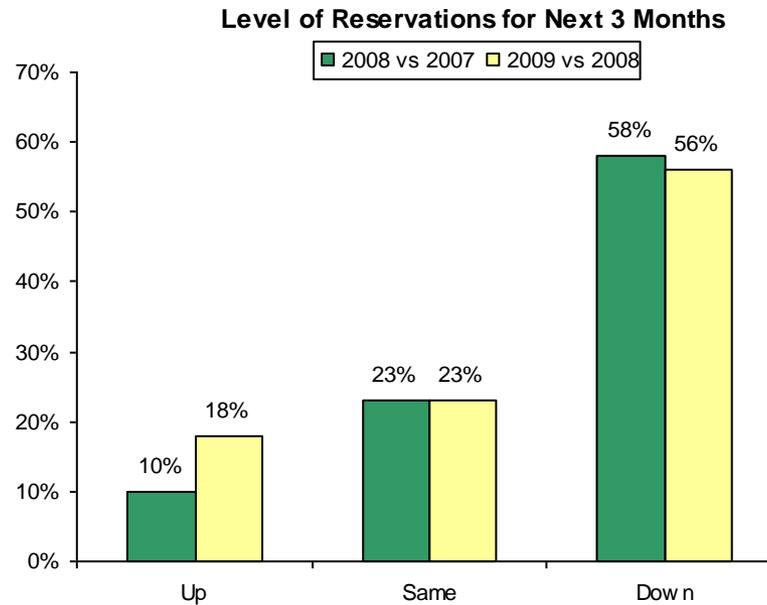




## Occupancy Barometer

Level of Reservations for next 3 months Compared to Last Year		
	2008	2009
Total Answering Respondents	142	141
Up	10%	18%
Same	23%	23%
Down	58%	56%

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



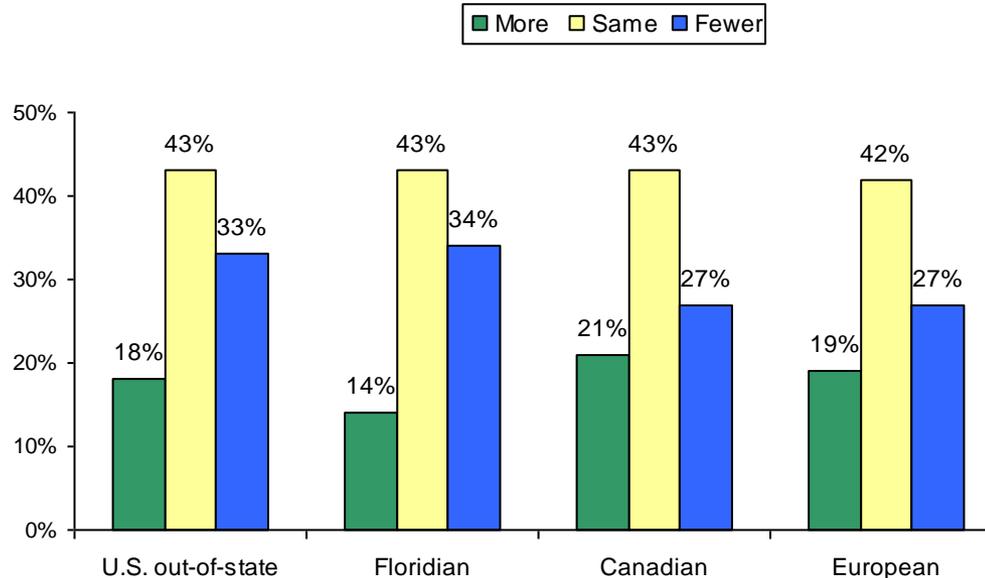


## Occupancy Barometer

Origin of Guests for Next 3 Months Compared to Last Year								
Property Managers Responding (118/121 Minimum)	More		Same		Fewer		Not Applicable	
	2008	2009	2008	2009	2008	2009	2008	2009
U.S. out-of-state	11%	18%	40%	43%	39%	33%	11%	6%
Floridian	11%	14%	44%	43%	38%	34%	8%	9%
Canadian	20%	21%	30%	<43%>	<40%>	27%	10%	9%
European	20%	19%	29%	<42%>	38%	27%	13%	12%

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



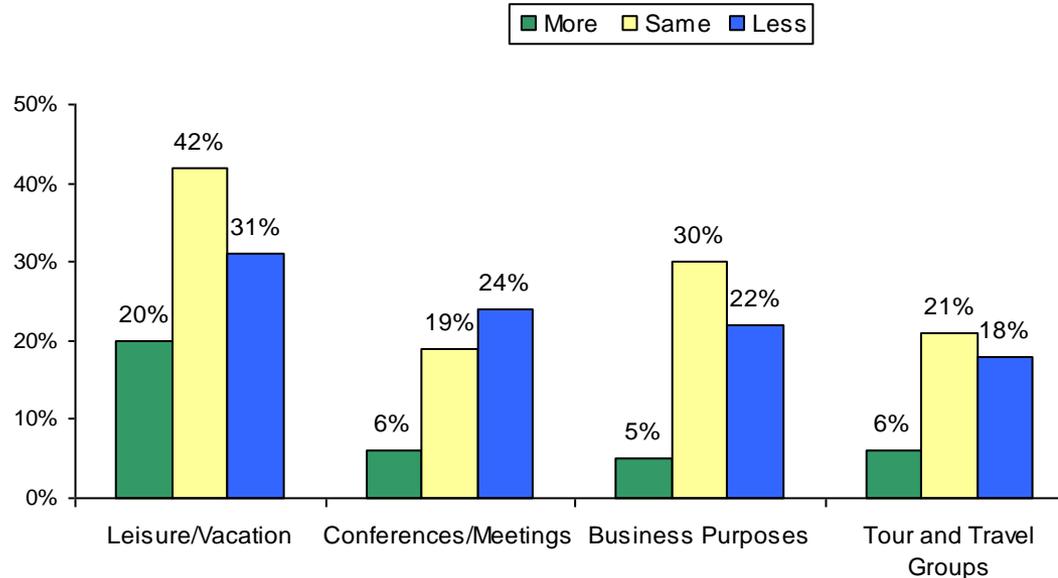


## Occupancy Barometer

Type of Travelers for Next 3 Months Compared to Last Year								
Property Managers Responding (106/114 Minimum)	More		Same		Less		Not Applicable	
	2008	2009	2008	2009	2008	2009	2008	2008
Leisure/Vacation	15%	20%	44%	42%	33%	31%	8%	7%
Conferences/Meetings	3%	6%	25%	19%	<39%>	24%	33%	<50%>
Business Purposes	4%	5%	26%	30%	<40%>	22%	30%	42%
Tour and Travel Groups	5%	6%	23%	21%	<30%>	18%	42%	55%

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

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





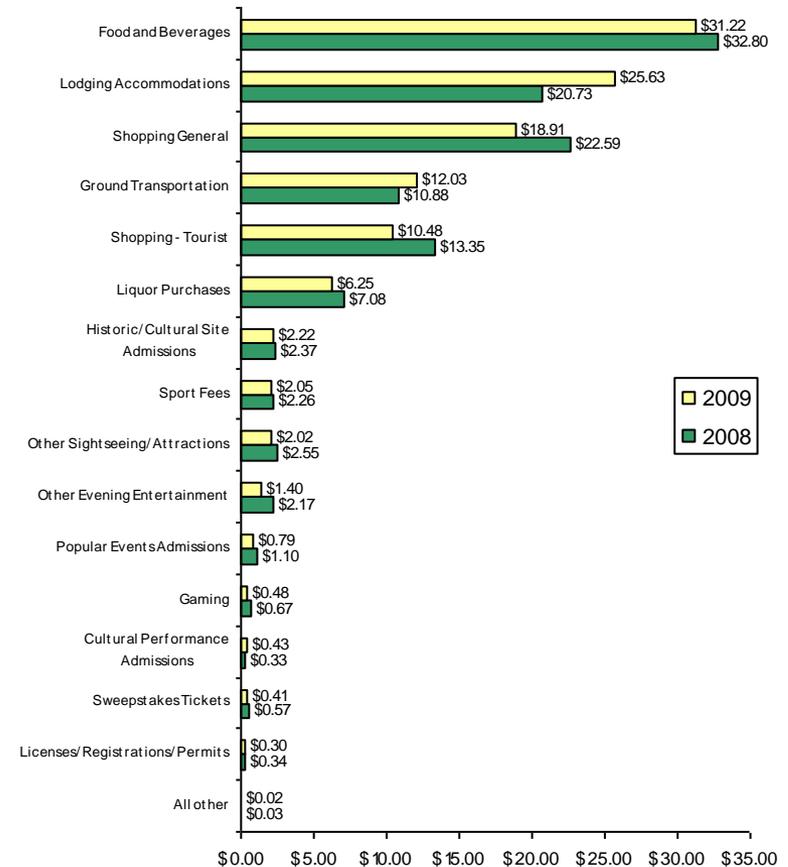
## Economic Impact Analysis December 2009



## Average Expenditures

December Average Expenditures per Person per Day			
	2008	2009	% Change
<b>TOTAL</b>	<b>\$119.83</b>	<b>\$114.63</b>	<b>-4.3%</b>
Food and Beverages	\$32.80	\$31.22	-4.8%
Shopping	\$35.94	\$29.39	-18.2%
Lodging Accommodations	\$20.73	\$25.63	23.6%
Ground Transportation	\$10.88	\$12.03	10.6%
Liquor Purchases	\$7.08	\$6.25	-11.7%
Historic/Cultural Site Admissions	\$2.37	\$2.22	-6.3%
Sport Fees	\$2.26	\$2.05	-9.3%
Other Sightseeing/Attractions	\$2.55	\$2.02	-20.8%
Other Evening Entertainment	\$2.17	\$1.40	-35.5%
Popular Events Admissions	\$1.10	\$0.79	-28.2%
Gaming	\$0.67	\$0.48	-28.4%
Cultural Performance Admissions	\$0.33	\$0.43	30.3%
Sweepstakes Tickets	\$0.57	\$0.41	-28.1%
Licenses/Registrations/Permits	\$0.34	\$0.30	-11.8%
All other	\$0.03	\$0.02	-33.3%

Average Expenditures per Person per Day

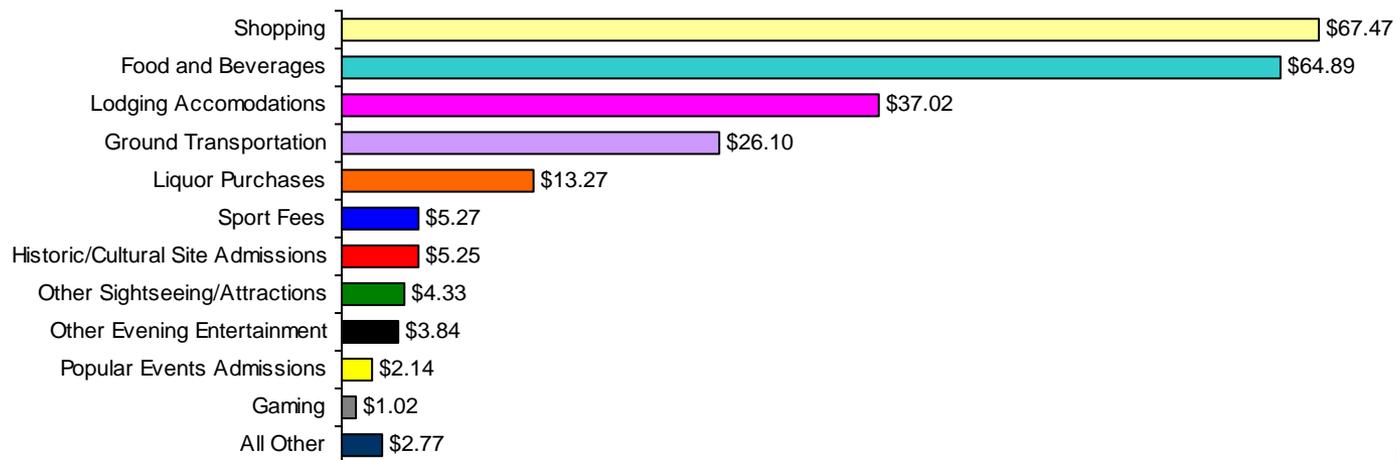




## Total Visitor Expenditures by Spending Category

DECEMBER TOTAL EXPENDITURES			
	2008	2009	% Change
<b>TOTAL</b>	<b>\$319,027,567</b>	<b>\$233,357,345</b>	<b>-26.9%</b>
Shopping	\$104,320,480	\$67,466,756	-35.3%
Food and Beverages	\$91,900,364	\$64,887,139	-29.4%
Lodging Accomodations	\$39,825,933	\$37,022,713	-7.0%
Ground Transportation	\$28,476,234	\$26,096,879	-8.4%
Liquor Purchases	\$20,385,602	\$13,271,164	-34.9%
Sport Fees	\$5,865,393	\$5,268,170	-10.2%
Historic/Cultural Site Admissions	\$5,856,618	\$5,250,108	-10.4%
Other Sightseeing/Attractions	\$6,457,423	\$4,326,210	-33.0%
Other Evening Entertainment	\$7,281,903	\$3,837,456	-47.3%
Popular Events Admissions	\$3,521,456	\$2,144,508	-39.1%
Gaming	\$1,747,135	\$1,015,920	-41.9%
All Other	\$3,389,026	\$2,770,322	-18.3%

December 2009 Total Expenditures  
(Millions)





## Total Visitor Expenditures by Spending Category

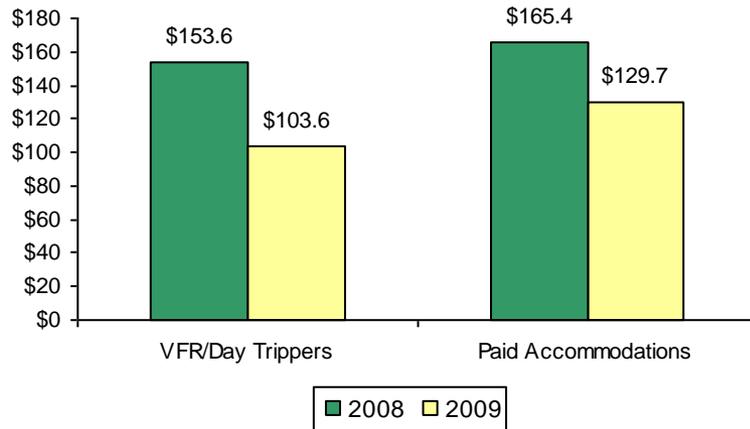
ALL PROPERTIES						
	Staying in Paid Accommodations			Visiting Friends and Relatives/ Day Trippers		
	2008	2009	% Change	2008	2009	% Change
<b>TOTAL</b>	<b>\$165,379,570</b>	<b>\$129,719,177</b>	<b>-21.6%</b>	<b>\$153,647,997</b>	<b>\$103,638,168</b>	<b>-32.6%</b>
Lodging Accommodations	\$39,825,933	\$37,022,713	-7.0%	\$0	\$0	--
Food and Beverages	\$39,719,455	\$31,915,857	-19.6%	\$52,180,909	\$32,971,282	-36.8%
Shopping	\$46,700,691	\$29,914,008	-35.9%	\$57,619,789	\$37,552,748	-34.8%
Ground Transportation	\$14,736,800	\$13,508,301	-8.3%	\$13,739,434	\$12,588,578	-8.4%
Liquor Purchases	\$8,442,182	\$6,216,164	-26.4%	\$11,943,420	\$7,055,000	-40.9%
Other Sightseeing/Attractions	\$3,306,147	\$2,539,803	-23.2%	\$3,151,276	\$1,786,407	-43.3%
Historic/Cultural Site Admissions	\$3,815,220	\$2,462,475	-35.5%	\$2,041,398	\$2,787,633	36.6%
Sport Fees	\$2,846,606	\$2,067,700	-27.4%	\$3,018,787	\$3,200,470	6.0%
Other Evening Entertainment	\$2,346,890	\$1,496,345	-36.2%	\$4,935,013	\$2,341,111	-52.6%
Popular Events Admissions	\$1,409,871	\$818,544	-41.9%	\$2,111,585	\$1,325,964	-37.2%
Gaming	\$558,519	\$661,354	18.4%	\$1,188,616	\$354,566	-70.2%
All Other	\$1,671,256	\$1,095,913	-34.4%	\$1,717,770	\$1,674,409	-2.5%



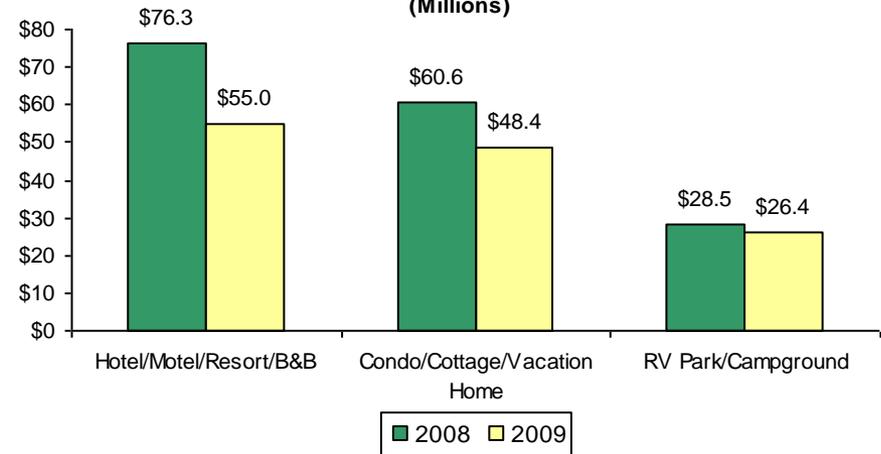
## Total Visitor Expenditures by Lodging Type

December Total Expenditures by Lodging Type					
	2008	2009	% Change	2008	2009
<b>TOTAL</b>	<b>\$319,027,567</b>	<b>\$233,357,345</b>	<b>-26.9%</b>	<b>100%</b>	<b>100%</b>
Visiting Friends & Relatives/Day Trippers	\$153,647,997	\$103,638,168	-32.6%	48%	44%
<b>Paid Accommodations</b>	<b>\$165,379,570</b>	<b>\$129,719,177</b>	<b>-21.6%</b>	<b>52%</b>	<b>56%</b>
<i>Hotel/Motel/Resort/B&amp;B</i>	\$76,316,009	\$54,977,697	-28.0%	24%	24%
<i>Condo/Cottage/Vacation Home</i>	\$60,600,384	\$48,382,016	-20.2%	19%	21%
<i>RV Park/Campground</i>	\$28,463,177	\$26,359,464	-7.4%	9%	11%

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.



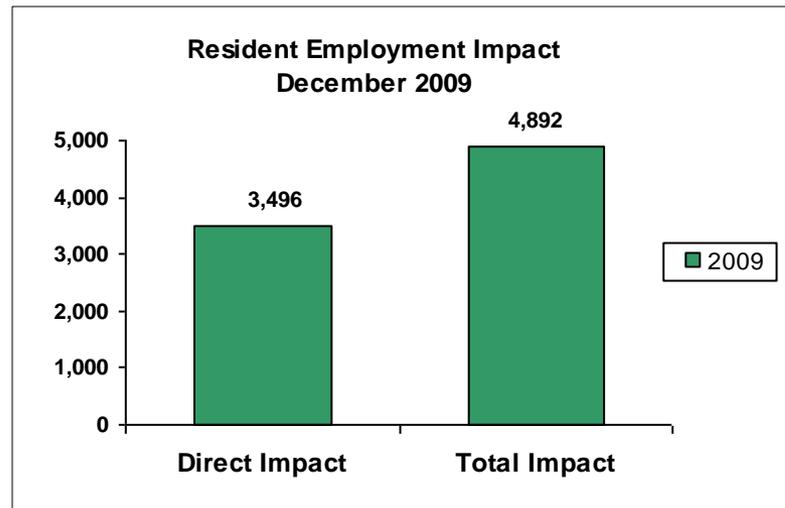
## Impact on Jobs for Lee County Residents

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.).





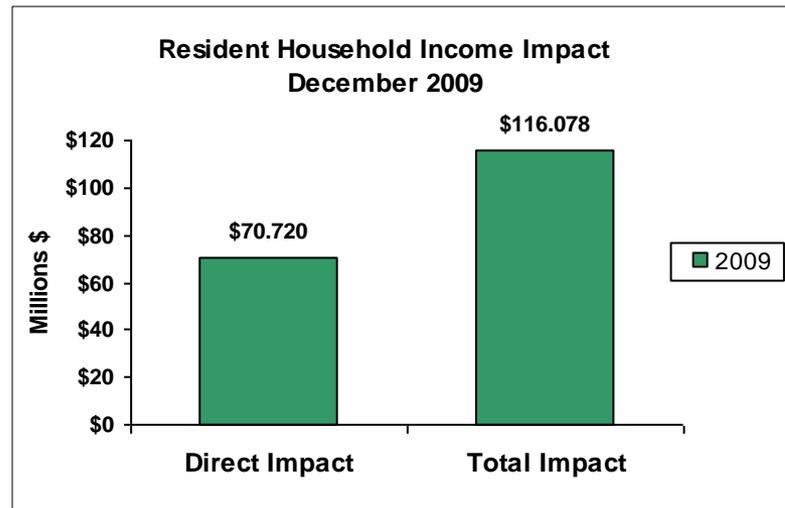
## Impact on Household Income for Lee County Residents

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.

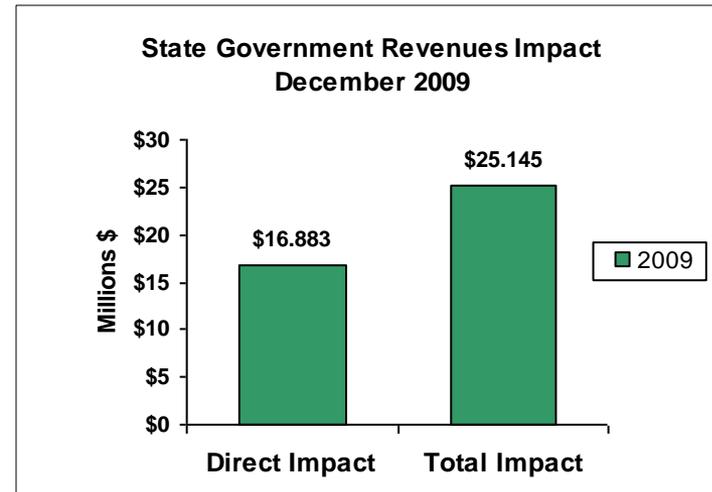
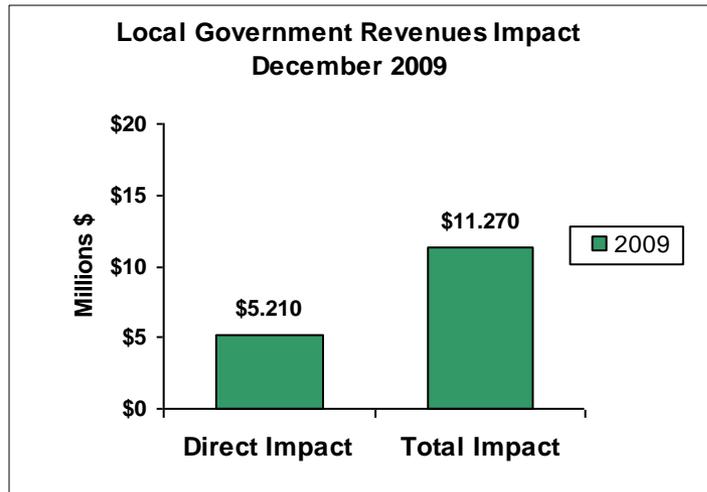
The gross government revenues accruing to governments as a result of producing the output purchased with visitor expenditures is the government revenue impact.

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).





## Appendix December 2009



## December 2009 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews*
Bonita Springs	Bonita Beach	2-Dec	16
Cape Coral	Cape Coral Yacht Club	2-Dec	8
Ft. Myers	Clarion	2-Dec	5
Ft. Myers Beach	Diamond Head Resort	4-Dec	8
Ft. Myers Beach	Neptune Inn	4-Dec	7
Ft. Myers Beach	Pink Shell Resort	4-Dec	9
Ft. Myers Beach	Estero Beach Club	4-Dec	8
Sanibel	Ding Darling Sanctuary	9-Dec	9
Sanibel	Sanibel Arms	9-Dec	4
Sanibel	Loggerhead Cay	9-Dec	8
Sanibel	Sanibel Moorings	9-Dec	6
Sanibel	Seaside Inn	9-Dec	6
Sanibel	Holiday Inn	9-Dec	7
Ft. Myers	Best Western	12-Dec	9
Sanibel	Periwinkle Campground	16-Dec	3
Sanibel	Casa Ybel	16-Dec	4
Sanibel	Pointe Santo	16-Dec	8
Sanibel	Ocean's Reach	16-Dec	4
Ft. Myers	Edison Estates	17-Dec	28
North Ft. Myers	Shell Factory	18-Dec	10
Ft. Myers Beach	Times Square	30-Dec	24
Bonita Springs	Dog Beach	31-Dec	12
<b>TOTAL</b>			<b>203</b>

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



## Occupancy Interviewing Statistics

Interviews were conducted from December 2 – December 29, 2009. Information was provided by 149 Lee County lodging properties.

Lodging Type	Number of Interviews
Hotel/Motel/Resort/B&Bs	90
Condo/Cottage/Vacation Home/Timeshare	41
RV Park/Campground	<u>18</u>
<b>Total</b>	<b>149</b>