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## February 2005 Visitor Profile – The Beaches of Fort Myers - Sanibel



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

### Prepared for:

Lee County Board of County Commissioners  
and  
Lee County Visitor and Convention Bureau

### Prepared by:

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April 1, 2005

## Lee County February 2005 Visitor Profile

### *Executive Summary: February 2005*

1. The Beaches of Fort Myers - Sanibel have almost completed the renewal process set in motion by the Summer storms. Our inventory model indicates that close to 95% of commercial lodgings in Lee are back on-line, serving the visitor industry. To wit, February 2005's occupancy grew by almost one full point to 93.3% (2004: 92.4%), while ADR expanded by 8.5% to \$158.53. The number of visitors this February, however, still experienced a slight contraction (-2.3%), while tourism's economic impact went up by 2.0%, reaching \$308,248,634.
  
2. This February, the strongest market performance came from the European visitor segment, which increased by 14.8%. Overall, Lee's February visitor origins are as follows:

<u>Visitor Origin</u>	<u>Rel. %</u>	<u>2004 Visitor #</u>	<u>February Rel. %</u>	<u>2005 Visitor #</u>	<u>% Δ</u>
Florida	3.8%	10,634	3.2%	8,747	-17.7
Southeast	4.9	13,712	5.0	13,668	-0.3
Northeast	35.8	100,184	34.6	94,582	-5.6
Midwest	46.9	131,247	47.4	129,572	-1.3
Canada	2.7	7,556	3.0	8,201	+8.5
Europe	4.0	11,194	4.7	12,848	+14.8
Markets of Opportunity	1.9	5,317	2.1	5,741	+8.0
<b>Total</b>	<b>100.0</b>	<b>279,844</b>	<b>100.0</b>	<b>273,359</b>	<b>-2.3</b>

3. This February, the impact of Southwest Florida International Airport (RSW) on Lee visitation increased significantly. Fully 65.2% of all visitors deplane at RSW (**2004: 61.8% of all visitors**).

## Lee County February 2005 Visitor Profile

4. This February's primary origin clusters brought visitors to the Beaches of Fort Myers - Sanibel from the following top ten DMA's (in rank order):

<u>February 2004</u>		<u>February 2005</u>		<u>'04 Rank</u>		
1.	New York	11.2%	1.	New York	11.5%	1
2.	Chicago	10.2	2.	Chicago	9.9	2
3.	Minneapolis/St. Paul	5.9	3.	Boston	5.8	5
4.	Detroit	5.6	4.	Detroit	5.5	4
5.	Boston	5.2	5.	Indianapolis	5.4	6
6.	Indianapolis	5.1	6.	Minneapolis / St. Paul	5.3	3
7.	Philadelphia	4.2	7.	Philadelphia	4.0	7
8.	Cleveland	4.0	8.	Cleveland	3.8	8
9.	Hartford/New Haven	2.7	9.	Providence / New Bedford	3.7	--
10.	Milwaukee	2.6	10.	Milwaukee	3.1	10
			11.	Columbus	3.1	--

Note that the February rank order of DMA clusters reflects a significant realignment of market penetrations and benefit contributions.

5. For better than nine of every ten visitors (93.2%) Lee is a destination selected prior to leaving home (**2004: 86.4%**).
6. Not surprisingly, therefore, repeat visitation contributes the lion's share, sustaining the destination's tourism industry: This February, almost 70% of visitors are returning to the Beaches of Fort Myers – Sanibel (**2004: 67.1% repeat visitors**). Visitor satisfaction, an important index of the destination's good will equity, reaches an unprecedented level of 99.3%.
7. The Internet continues to provide the most efficient avenue of information distribution for Lee's tourism industry. Better than four of every five visitors (83.8%) use the Internet and fully 69.7% of **ALL** visitors obtain travel information on-line. Additionally, over half (52.1%) say they buy travel services on-line.

**The Beaches of Fort Myers - Sanibel:**  
*2005 February Visitor Profile*

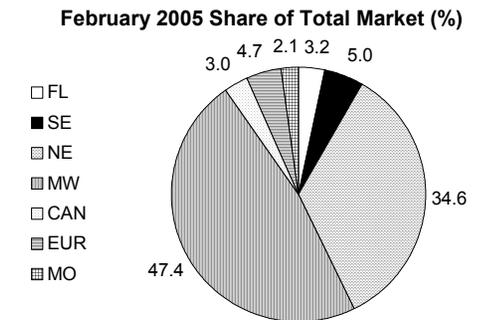
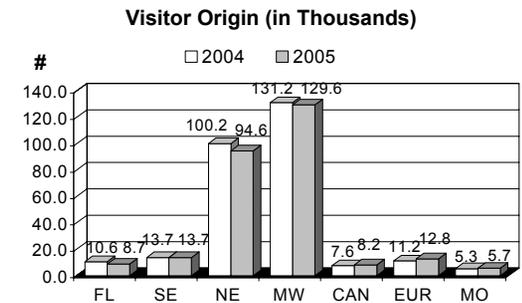


## February 2005 Visitor Profile – The Beaches of Fort Myers - Sanibel

Visitor Volume	Annual 2004	YEAR TO DATE		% Δ	February		% Δ
	2004	2004	2005	04/05	2004 *	2005	04/05
Visitors (#)	2,026,921	485,825	474,292	-2.4	279,844	273,359	-2.3
Room Nights	n/a	1,220,460	1,146,841	-6.0	575,126	532,668	-7.4
Direct Exp. (\$)	\$1,164,594,233	\$305,751,321	\$311,451,155	+1.9	\$179,850,142	\$183,514,100	+2.0

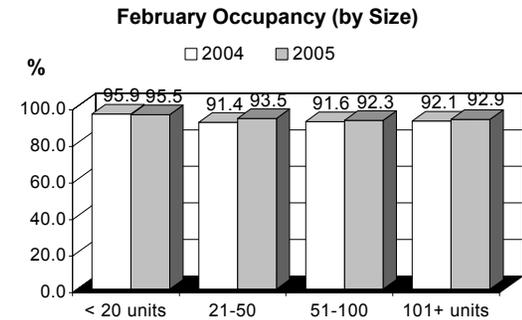
\* Note that Feb. 2004 was a leap year

Visitor Origin	Annual Market Share		February 2004		February 2005		
	2003	2004	% Share	Visitor #	% Share	Visitor #	% Add Vis
Florida	12.6%	11.4%	3.8%	10,634	3.2%	8,747	-17.7
Southeast	7.0	6.8	4.9	13,712	5.0	13,668	-0.3
Northeast	28.4	28.9	35.8	100,184	34.6	94,582	-5.6
Midwest	37.9	38.5	46.9	131,247	47.4	129,572	-1.3
Canada	2.3	2.3	2.7	7,556	3.0	8,201	+8.5
Europe	8.4	8.9	4.0	11,194	4.7	12,848	+14.8
Markets of Opp.	3.4	3.2	1.9	5,317	2.1	5,741	+8.0
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0</b>	<b>279,844</b>	<b>100.0</b>	<b>273,359</b>	<b>-2.3</b>

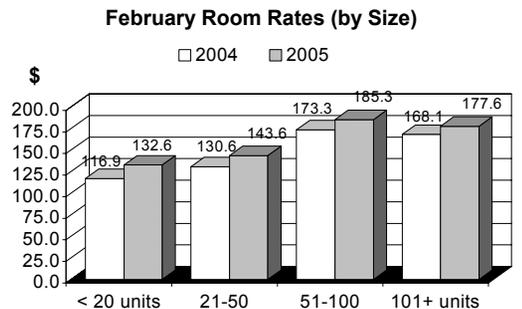


Occupancy:	Seasonal Averages			
	Winter	Spr/Sum	Fall	Annual
Industry (Weighted)				
Occupancy 2004	88.0%	70.7%	69.4%	76.6%
Occupancy 2003	85.3	68.5	61.6	72.4
<b>Δ Points</b>	<b>+2.7</b>	<b>+2.2</b>	<b>+7.8</b>	<b>+4.2</b>
ADR 2004	\$130.29	\$92.68	\$91.44	\$105.93
ADR 2003	126.67	88.79	84.73	101.12
<b>Δ Percent</b>	<b>+2.9%</b>	<b>+4.4%</b>	<b>+7.9%</b>	<b>+4.8%</b>

Occupancy:	Monthly	
	Jan.	Feb.
Industry (Weighted)		
Occupancy 2005	83.1%	93.3%
Occupancy 2004	80.6	92.4
<b>Δ Points</b>	<b>+2.5</b>	<b>+0.9</b>
ADR 2005	\$126.03	\$158.53
ADR 2004	116.90	146.09
<b>Δ Percent</b>	<b>+7.8%</b>	<b>+8.5%</b>

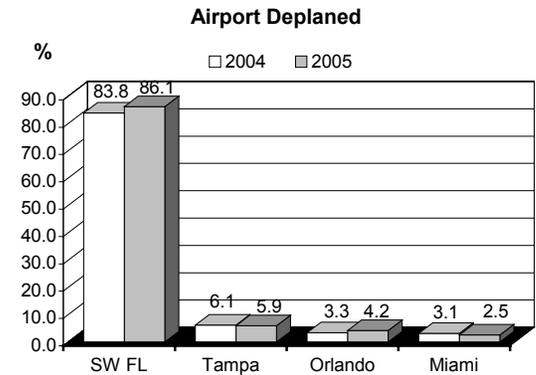
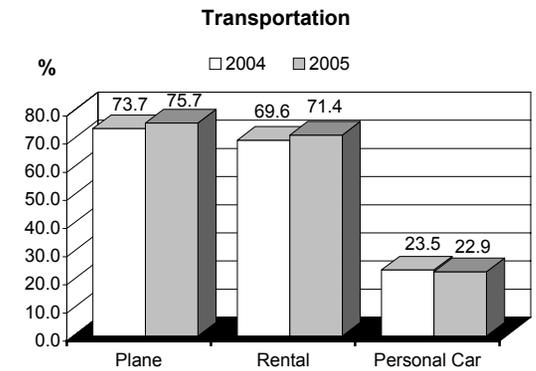


Size Category	February Occupancy			February Room Rate		
	2004	2005	Point Δ	2004	2005	% Δ
< 20 units	95.9%	95.5%	-0.4	\$116.87	\$132.61	+13.5
21-50 units	91.4	93.5	+2.1	130.59	143.56	+9.9
51-100 units	91.6	92.3	+0.7	173.30	185.32	+6.9
101 + units	92.1	92.9	+0.8	168.11	177.55	+5.6

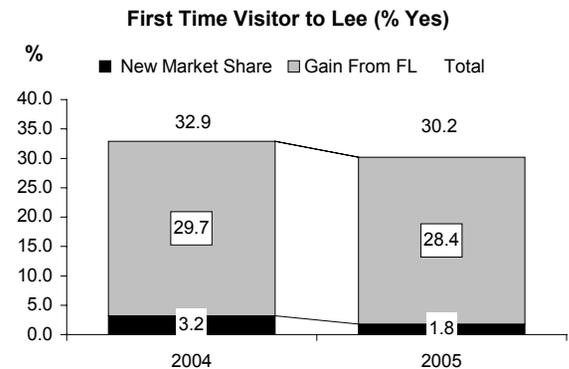


## February 2005 Visitor Profile – The Beaches of Fort Myers - Sanibel

	<u>February 2004</u>	<u>February 2005</u>
<b>Transportation Mode (H/M/C/C + In-Home)</b>		
Plane	73.7%	75.7%
Rental Car	69.6	71.4
Personal Car	23.5	22.9
<b>Airport Deplanned</b>		
Southwest Florida International	83.8%	86.1%
Tampa International	6.1	5.9
Orlando International	3.3	4.2
Miami International	3.1	2.5
<b>Car Rental Location</b>		
Fort Myers	80.8%	83.0%
Tampa	6.4	6.3
Orlando	3.4	4.4
Miami	3.3	2.8

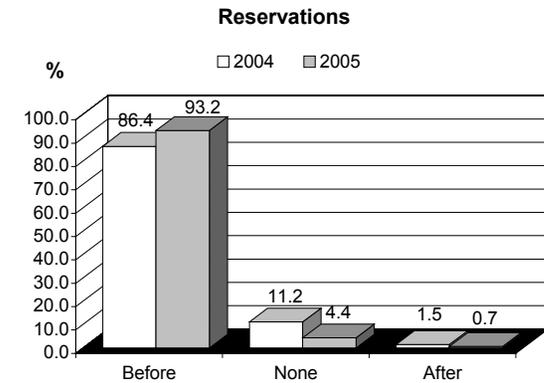
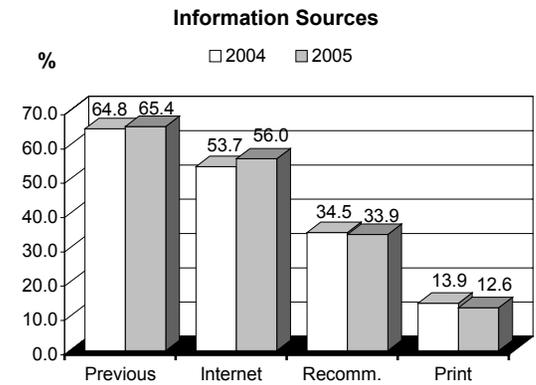


	<u>February 2004</u>	<u>February 2005</u>
<b>Purpose of Trip</b>		
<b>A. Visitor Profile Data</b>		
Vacation	98.5%	96.6%
Visit Friends and Relatives	12.0	16.2
<b>B. Occupancy Survey Data</b>		
Conferences/ Business Meetings	13.7%	15.6%
<b>First Visit to (% yes)</b>		
Lee County	32.9%	30.2%
Florida	3.2	1.8
<b>First Time Visitors (by Region)</b>		
Florida	22.2%	29.9%
Southeast	42.9	34.5
Northeast	31.5	28.3
Midwest	27.5	25.2
Canada	30.5	37.9
Europe	37.5	40.6
Markets of Opportunity	38.5	46.2

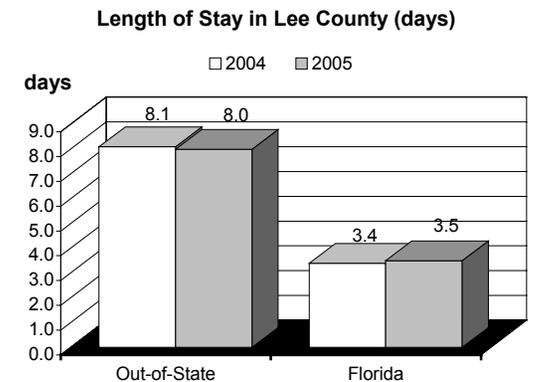


## February 2005 Visitor Profile – The Beaches of Fort Myers - Sanibel

	<u>February 2004</u>	<u>February 2005</u>
<b>Average Repeat Visits to Lee</b>	3.2	3.4
<b>Information Sources</b> <i>(Multiple Response)</i>		
Previous Visit	64.8%	65.4%
Internet	53.7	56.0
Recommendations	34.5	33.9
Print Media	13.9	12.6
Travel Agent	2.8	1.8
<b>Assisted by Travel Agent</b>	13.7%	12.6%
<b>Travel Agent Assisted with</b>		
Airline Reservations	62.0%	58.5%
Hotel/Motel Reservations	45.5	43.2
Vacation Packages <i>(Including fly/drive)</i>	15.3	21.7
<b>Reservations</b>		
Before Leaving Home	86.4%	93.2%
None	11.2	4.4
After Arrival	1.5	0.7
<b>Percent With No Reservations or Reservations Made Less than 7 Days In Advance of Arrival</b>	15.4%	16.6%

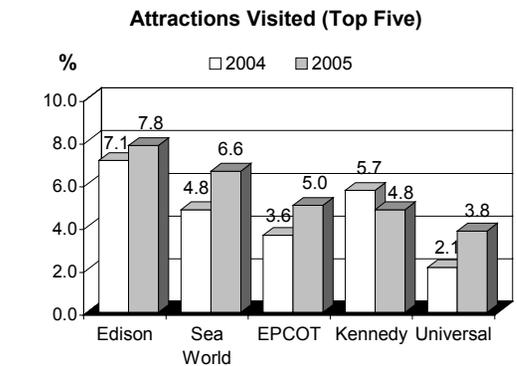
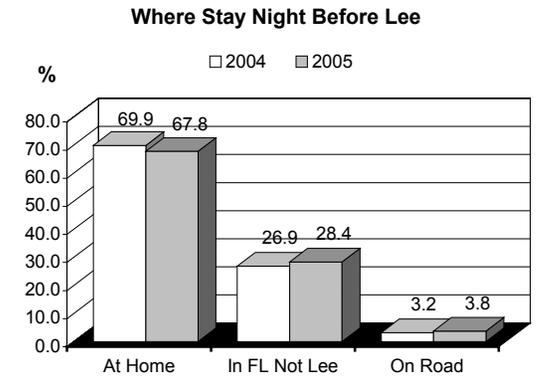
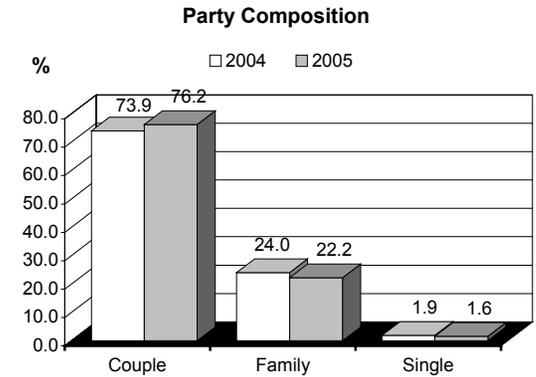


	<u>Feb. '04</u> <u>Out-of-</u> <u>State</u>	<u>Feb. '05</u> <u>Out-of-</u> <u>State</u>	<u>Feb. '04</u> <u>Floridian</u>	<u>Feb. '05</u> <u>Floridian</u>
<b>Length of Stay</b> <i>(days)</i>				
Away from Home	11.9	11.8	3.6	3.8
In Florida	10.8	10.8	N/A	N/A
In Lee County	8.1	8.0	3.4	3.5
<b>% Staying 4 Days or Less in Lee</b>	21.9%	21.3%	91.5%	88.5%
<b>Party Size</b>	2.4	2.5	2.1	2.2



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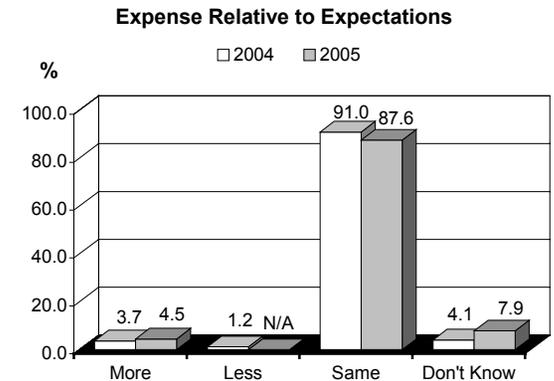
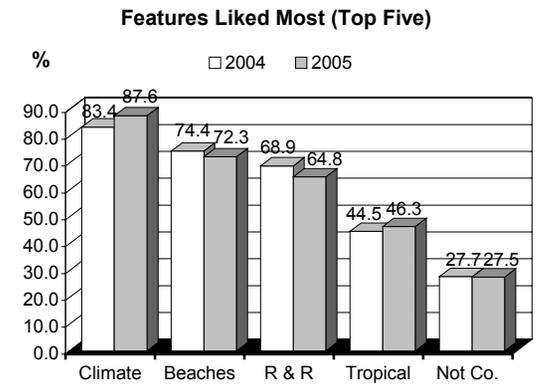
	<u>February 2004</u>	<u>February 2005</u>
<b>Party Composition</b>		
Couple	73.9%	76.2%
Family	24.0	22.2
Single	1.9	1.6
<b>Where Stay Night Before Lee (Out-of-State)</b>		
At Home	69.9%	67.8%
In Florida, Not in Lee	26.9	28.4
On the Road, Not in Florida	3.2	3.8
<b>Where Stayed in Florida (Base: Respondents In Florida Night Prior to Lee)</b>		
Orlando/Disney	21.4%	18.8%
Tampa Bay	15.5	17.7
Sarasota	10.7	12.1
Fort Lauderdale/Palm Beach	11.9	10.5
Naples/Marco Island	5.9	8.0
Miami	2.4	5.7
Florida Keys	6.0	4.3
<b>Attractions Visited</b>		
Edison Home/Ford Home	7.1%	7.8%
Sea World	4.8	6.6
EPCOT	3.6	5.0
Kennedy Space Center	5.7	4.8
Universal	2.1	3.8
Disney	2.8	3.4
Ding Darling	2.2	2.3
<b>Satisfaction with Lee County</b>	99.4%	99.3%



## February 2005 Visitor Profile – The Beaches of Fort Myers - Sanibel

	<u>February 2004</u>	<u>February 2005</u>
<b>Features Liked Most about Lee</b>		
Climate	83.4%	87.6%
Beaches	74.4	72.3
Rest/Relaxation/Quiet	68.9	64.8
Tropical Atmosphere	44.5	46.3
Not Commercial	27.7	27.5
Accommodations	11.8	17.3
Friendly Residents	11.7	15.8
Clean Environment	18.4	15.3

<b>Features Liked Least about Lee</b>		
No Specific Complaints	59.5%	52.3%
Congestion/Over-Population	32.0	35.1
Weather	1.8	3.1
Expense	3.4	2.4



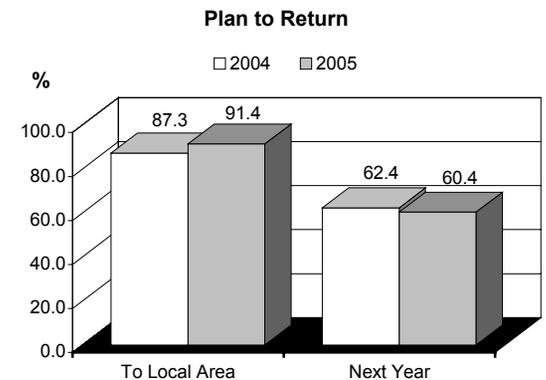
	<u>February 2004</u>	<u>February 2005</u>
<b>Expense Relative to Expectations</b>		
More Expensive	3.7%	4.5%
Less Expensive	1.2	N/A
As Expected	91.0	87.6
Don't Know	4.1	7.9

<b>Recommend Lee to Friends/Relatives</b> (% yes)	90.7%	88.0%
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<b>Plan to Return (% yes)</b>		
To Local Area	87.3%	91.4%
Next Year (Base: Return to Local Area)	62.4	60.4

<b>Median Age Head of Household (years)</b>	54.5	54.2
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<b>Median Annual Household Income</b>	\$81,224	\$82,264
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## February 2005 Visitor Profile – The Beaches of Fort Myers - Sanibel

	<u>February 2004</u>	<u>February 2005</u>
<b>Average Number of (per year)</b>		
Getaway Trips	2.8	2.8
Vacations	1.9	1.8
<b>Out-of-State Visitor Party Budget</b> (Lee Stay: Food/Lodging/Entertainment)		
Total	\$2,016.99	\$2,149.89
Per Person/Trip	840.41	859.96
Per Person/Day	103.75	107.49

### Out-of-State Visitor Party Budget Breakout (Lee Stay)

Accommodations	\$1,108.44	\$1,212.44
Food/Entertainment	622.13	637.98
Rental Car	269.48	288.50
Retail Purchases	176.48	177.82

### Travel Stories, Advertising, and/or Promotions Seen/Read/Heard For Destination

(% yes)	34.8%	30.9%
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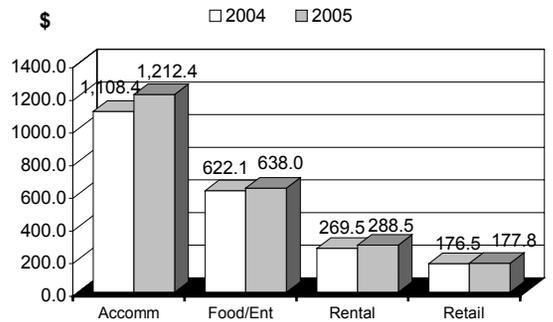
### Type of Message Seen

Internet	70.6%	71.3%
Newspapers	18.9	35.5
Travel Guides/Visitor Guides/Brochures	25.1	22.5
Television	4.4	15.1
Magazines	14.5	8.2

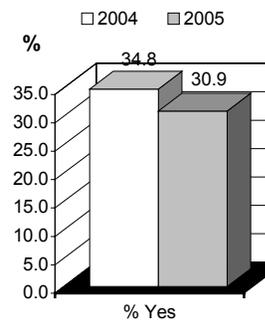
### Influenced by Lee Message

(Base: Respondents Reporting See/Read/Hear Message)	81.3%	71.6%
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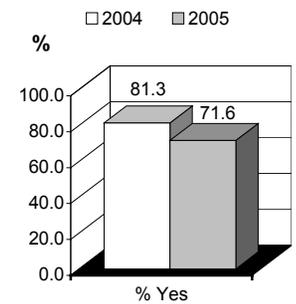
**Budget Breakout**



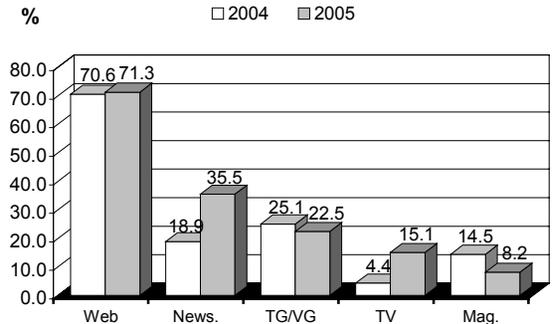
**See/Hear/Read Message**



**Influenced by Message**

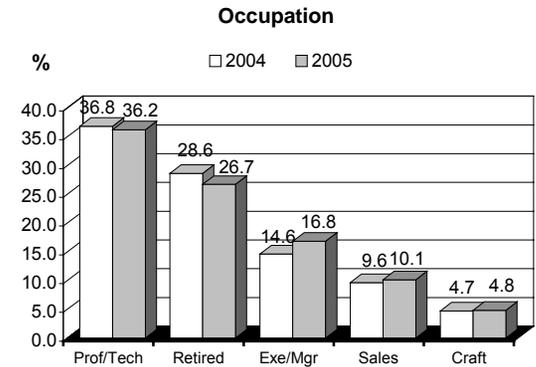


**Type of Message Seen**

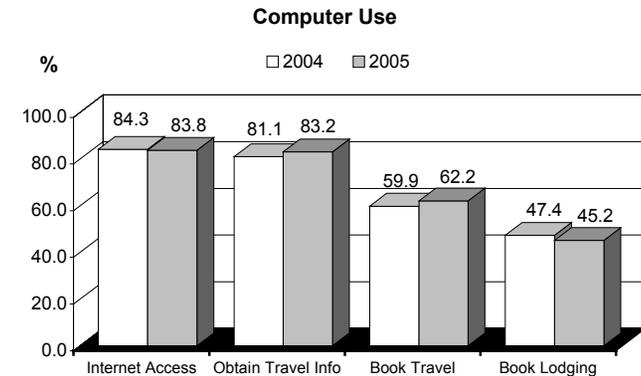


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Occupation	<u>February 2004</u>	<u>February 2005</u>
Professional/Technical	36.8%	36.2%
Retired	28.6	26.7
Executive/Managerial	14.6	16.8
Salesman/Buyer	9.6	10.1
Craft/Factory	4.7	4.8



	<u>February 2004</u>	<u>February 2005</u>
<b>Have Internet Access</b> ( <i>Base: Respondents with use of a computer</i> )	84.3%	83.8%
<b>Use Internet to:</b> ( <i>Base: Respondents who have internet access</i> )		
Obtain Travel Information	81.1%	83.2%
Book Travel Services On-line	59.9	62.2
<b>Book Lodging Reservations:</b> ( <i>Base: Respondents who book travel services on-line</i> )	47.4%	45.2%



February 2005 Visitor Profile – The Beaches of Fort Myers - Sanibel

Lee County Origin Markets

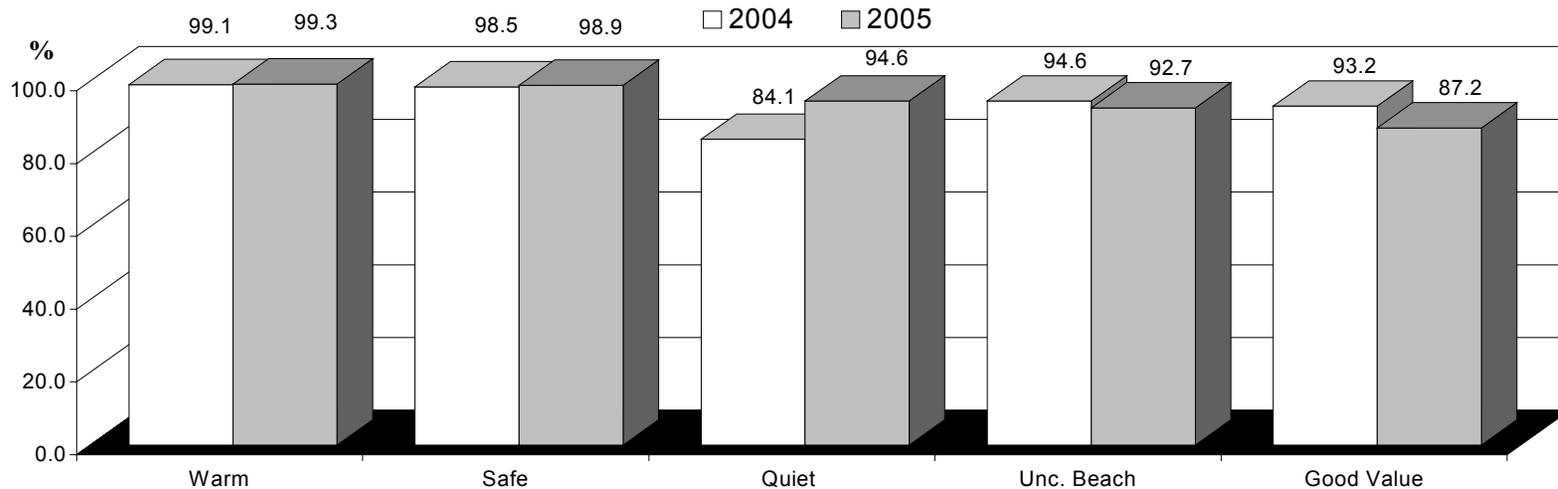
2002 – 2003 Percent Changes (By Same Month Last Year)												
Origin Mkts	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
Florida	-22.0	-16.1	+4.9	-8.3	-1.5	+3.4	+4.6	+4.3	+0.4	-9.2	+4.0	+9.9
Southeast	+15.6	-0.1	+5.3	+9.0	-13.3	-1.1	+3.0	-2.4	+7.7	-1.2	+0.1	+3.9
Northeast	-2.2	-3.7	+2.1	+0.5	+9.2	+17.8	+10.5	+9.9	+5.8	+6.2	-0.7	+4.4
Midwest	+0.1	+0.5	-4.1	+1.3	+7.9	+3.5	+9.2	+7.7	+7.6	+6.9	+6.3	+7.8
Canada	+18.1	-5.4	+11.3	+10.3	-29.9	+25.0	-7.3	-20.9	-8.2	+14.9	-3.5	+12.9
Europe	+22.9	+3.0	-19.6	+8.9	+13.7	+14.4	+10.4	+6.2	-4.4	+7.9	+11.6	+13.0
Mkts of Opp.	+9.9	-6.1	+8.8	+24.1	+29.0	+4.1	+21.2	-7.0	-3.4	-0.4	-7.8	-11.1
<b>TOTAL</b>	<b>+1.7</b>	<b>-2.1</b>	<b>-1.4</b>	<b>+1.9</b>	<b>+5.2</b>	<b>+7.1</b>	<b>+8.1</b>	<b>+5.4</b>	<b>+3.3</b>	<b>+3.5</b>	<b>+3.2</b>	<b>+6.6</b>
2003 – 2004 Percent Changes (By Same Month Last Year)												
Origin Mkts	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
Florida	+3.4	-1.5	+0.8	+0.7	-11.9	-3.7	-1.5	-49.0	-9.9	-12.8	-10.8	+8.4
Southeast	-0.7	+4.6	+5.6	+3.1	-0.8	+11.9	-3.4	-38.6	+5.1	-2.5	-15.4	-17.3
Northeast	+9.1	+11.7	+6.2	+5.9	+4.7	+10.0	+9.8	-65.6	-44.3	-11.0	-2.0	-4.0
Midwest	+6.9	+9.6	+5.1	+8.3	+3.9	+7.4	+10.9	-55.4	-36.7	-6.0	-3.9	-7.1
Canada	-0.2	+5.0	-10.9	+14.8	+21.6	+21.5	+23.9	-58.3	-52.5	-22.0	-24.9	+7.5
Europe	+10.9	+6.2	+5.6	+10.8	+11.5	+11.9	+11.8	-22.9	-0.9	-4.6	+0.2	+17.4
Mkts of Opp.	-20.7	-10.1	-18.8	+3.9	+8.9	+3.2	+3.3	-44.9	-9.9	-11.8	-9.9	+12.2
<b>TOTAL</b>	<b>+5.7</b>	<b>+8.9</b>	<b>+3.9</b>	<b>+6.6</b>	<b>+1.4</b>	<b>+6.4</b>	<b>+6.2</b>	<b>-49.9</b>	<b>-24.0</b>	<b>-8.3</b>	<b>-5.3</b>	<b>-3.3</b>
2004 – 2005 Percent Changes (By Same Month Last Year)												
Origin Mkts	Jan.	Feb.	Mar.	Apr.	May	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.
Florida	-11.1	-17.7										
Southeast	-6.2	-0.3										
Northeast	-1.8	-5.6										
Midwest	-7.1	-1.3										
Canada	+9.0	+8.5										
Europe	+17.1	+14.8										
Mkts of Opp.	+13.8	+8.0										
<b>TOTAL</b>	<b>-2.5</b>	<b>-2.3</b>										

## February 2005 Visitor Profile – The Beaches of Fort Myers - Sanibel

### Influential Factors in Choosing Lee

Influential Factors	Mar. '04	Apr. '04	May '04	Jun. '04	Jul. '04	Aug '04	Sep. '04	Oct. '04	Nov. '04	Dec. '04	Jan. '05	Feb. '05	Feb. '04
Warm Weather	99.0%	99.6%	93.7%	80.2%	77.0%	N/A	82.3%	93.9%	93.0%	98.0%	99.2%	99.3%	99.1%
Safe Destination	97.2	98.1	97.5	95.6	96.7	N/A	91.1	97.4	97.6	98.6	97.7	98.9	98.5
Quiet Atmosphere	85.9	82.0	89.2	91.0	86.2	N/A	91.2	91.7	93.3	92.3	94.4	94.6	84.1
Uncommercialized Beaches	94.3	94.4	92.7	93.7	94.8	N/A	89.2	89.0	94.9	90.7	92.6	92.7	94.6
Good Value for the Money	92.2	92.8	90.1	91.4	90.5	N/A	81.9	90.9	89.0	92.2	91.1	87.2	93.2
White Sand Beaches with Shelling	82.2	85.5	79.0	82.0	86.4	N/A	73.3	73.5	79.0	82.3	83.0	86.2	87.4
Complete Relaxation	87.4	92.3	93.5	94.7	90.6	N/A	84.4	88.7	87.2	86.1	87.1	85.8	89.0
Sunning on the Beach	84.8	84.3	78.1	80.7	83.1	N/A	67.9	72.4	80.6	80.9	80.2	80.1	78.4
Reasonably Priced Lodging	79.7	78.0	82.9	90.6	83.7	N/A	86.4	81.9	79.8	81.6	78.3	79.9	78.1
Family Atmosphere	73.9	78.1	74.9	81.3	84.6	N/A	70.5	74.7	70.9	79.4	76.1	78.6	77.4
Clean, Unspoiled Environment	82.6	83.2	85.3	88.9	82.2	N/A	72.4	67.2	67.4	76.5	71.6	77.7	80.6
Tropical Plants/Animals	82.1	83.7	77.8	85.7	76.0	N/A	68.2	68.6	68.7	73.2	73.1	77.3	83.9
Affordable Dining	75.0	73.0	71.1	76.1	71.4	N/A	67.5	69.1	70.8	66.2	70.6	72.5	70.4
Upscale Accommodations	70.5	69.7	76.3	70.3	75.3	N/A	64.3	71.8	71.2	74.0	73.8	69.5	69.3

### Influential Factors in Choosing Lee (Top Five) -- February



TOP U.S. FEEDER MARKETS

<u>February 2004</u>			<u>February 2005</u>			<u>'04 Rank</u>
1.	New York	11.2%	1.	New York	11.5%	1
2.	Chicago	10.2	2.	Chicago	9.9	2
3.	Minneapolis / St. Paul	5.9	3.	Boston	5.8	5
4.	Detroit	5.6	4.	Detroit	5.5	4
5.	Boston	5.2	5.	Indianapolis	5.4	6
6.	Indianapolis	5.1	6.	Minneapolis / St. Paul	5.3	3
7.	Philadelphia	4.2	7.	Philadelphia	4.0	7
8.	Cleveland	4.0	8.	Cleveland	3.8	8
9.	Hartford / New Haven	2.7	9.	Providence / New Bedford	3.7	--
10.	Milwaukee	2.6	10.	Milwaukee	3.1	10
			11.	Columbus	3.1	--

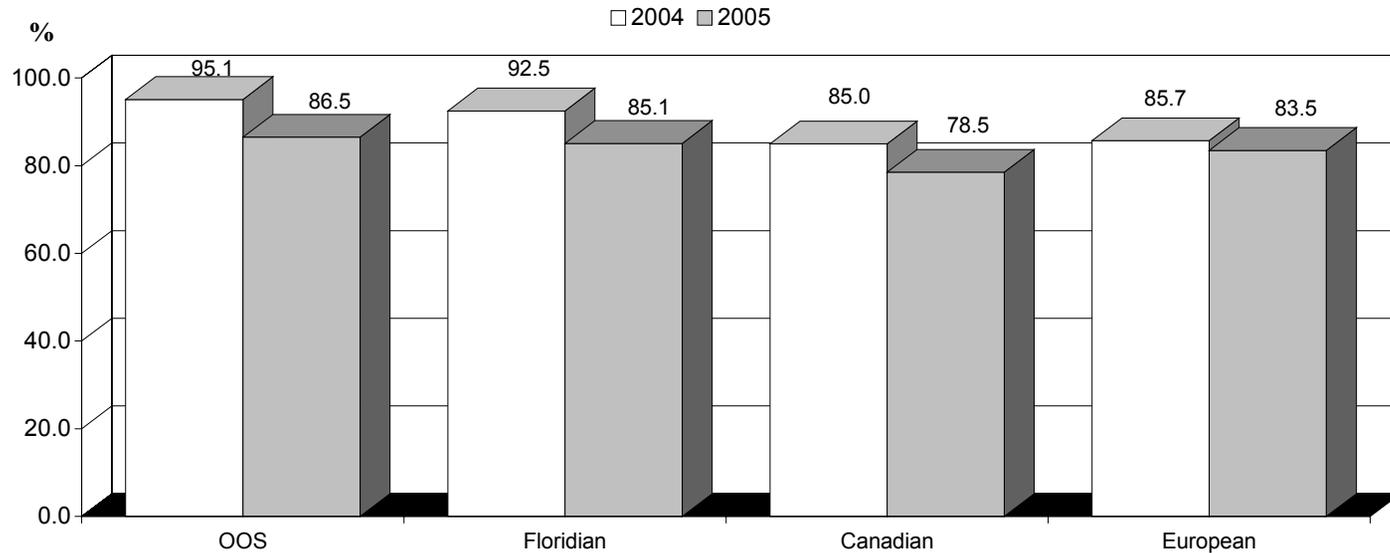
**Please Note:** In February 2005, the Miami/Ft. Lauderdale segment accounted for 36% of the Florida market. The distribution is as follows: Broward County: 58%; Dade County: 42%. Sample size does not permit statistical inference.

Lee County Occupancy Barometer: 2005

1. Compared to last year, **OVER THE NEXT THREE MONTHS**, Hotel/Motel/Condominium managers report **RESERVATIONS UP OR THE SAME** for:

	Mar. '04	Apr. '04	May '04	Jun. '04	Jul. '04	Aug. '04	Sep. '04	Oct. '04	Nov. '04	Dec. '04	Jan. '05	Feb. '05	Feb. '04
U.S. OOS Travelers	90.0%	90.7%	89.2%	87.9%	90.1%	N/A	75.8%	79.6%	79.3%	66.7%	83.6%	86.5%	95.1%
Floridian Travelers	86.7	89.0	90.4	90.9	91.5	N/A	79.4	79.1	77.8	75.4	85.3	85.1	92.5
Canadian Travelers	75.0	76.5	72.7	74.0	70.0	N/A	75.0	74.3	68.2	62.9	78.9	78.5	85.0
European Travelers	81.1	77.9	81.2	81.5	84.2	N/A	78.6	75.7	80.1	74.6	87.5	83.5	85.7

Reservations: February 2004 - 2005

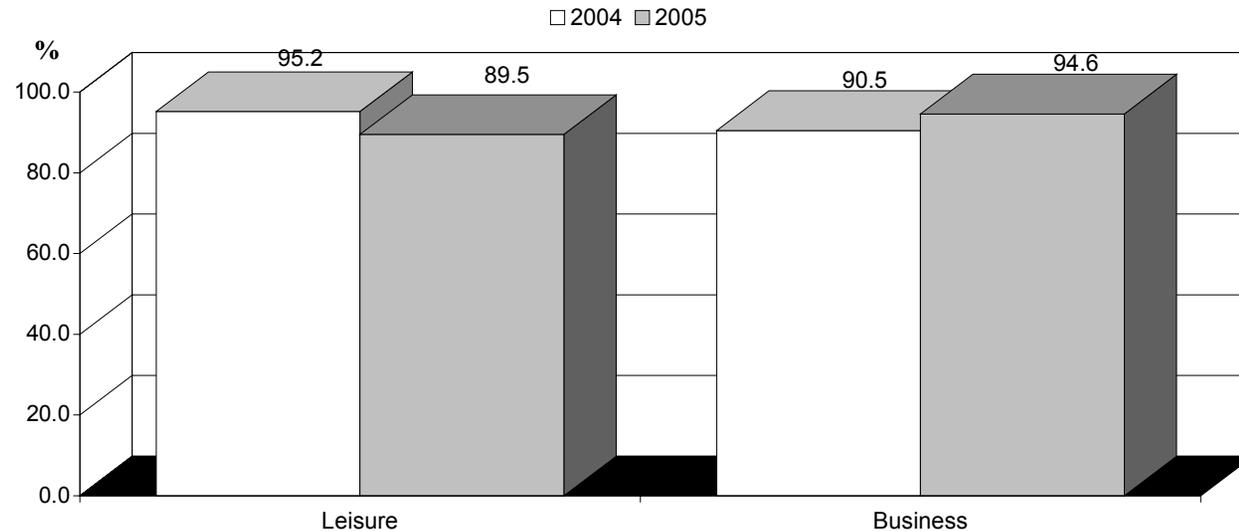


## February 2005 Visitor Profile – The Beaches of Fort Myers - Sanibel

2. **OVER THE NEXT THREE MONTHS** (compared to the same period last year) industry managers **EXPECT** “growth” or “stability” for the following market segments:

	Mar. '04	Apr. '04	May '04	Jun. '04	Jul. '04	Aug.'04	Sep. '04	Oct. '04	Nov. '04	Dec. '04	Jan. '05	Feb. '05	Feb. '04
Leisure Travelers	94.9%	93.0%	92.8%	91.7%	93.9%	N/A	78.1%	88.9%	87.5%	81.7%	89.7%	89.5%	95.2%
Business Travelers	92.5	91.5	91.7	92.8	91.4	N/A	87.1	90.6	86.8	86.0	94.8	94.6	90.5
Conferences/ Business Meetings	82.9	85.5	88.4	91.2	87.2	N/A	87.0	83.3	83.5	81.3	85.7	87.9	85.7
Travel and Tour	86.1	86.0	93.0	90.6	88.5	N/A	82.6	80.8	82.8	75.0	84.4	88.9	90.7

**Expectations: February 2004 - 2005**



## Lee County Visitor Origins (Actual Number of Visitors) 2002 - 2005

	Florida								Southeast							
	2002		2003		2004		2005		2002		2003		2004		2005	
	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD
Jan	11,498	11,498	8,964	8,964	9,269	9,269	8,238	8,238	13,989	13,989	16,174	16,174	16,067	16,067	15,070	15,070
Feb	12,862	24,360	10,797	19,761	10,634	19,903	8,747	16,985	13,125	27,114	13,111	29,285	13,712	29,779	13,668	28,738
Mar	18,684	43,044	19,591	39,352	19,750	39,653			17,497	44,611	18,421	47,706	19,447	49,226		
Apr	35,294	78,338	32,356	71,708	32,587	72,240			16,765	61,376	18,275	65,981	18,849	68,075		
<b>Winter</b>	<b>78,338</b>	<b>78,338</b>	<b>71,708</b>	<b>71,708</b>	<b>72,240</b>	<b>72,240</b>			<b>61,376</b>	<b>61,376</b>	<b>65,981</b>	<b>65,981</b>	<b>68,075</b>	<b>68,075</b>		
May	31,107	109,445	30,632	102,340	26,977	99,217			7,513	68,889	6,515	72,496	6,463	74,538		
June	31,129	140,574	32,197	134,537	31,018	130,235			14,015	82,904	13,861	86,357	15,509	90,047		
July	37,639	178,213	39,357	173,894	38,764	168,999			16,264	99,168	16,748	103,105	16,181	106,228		
Aug	27,504	205,717	28,685	202,579	14,628	183,627			7,928	107,096	7,739	110,844	4,755	110,983		
<b>Spr/Sum</b>	<b>127,379</b>	<b>205,717</b>	<b>130,871</b>	<b>202,579</b>	<b>111,387</b>	<b>183,627</b>			<b>45,720</b>	<b>107,096</b>	<b>44,863</b>	<b>110,844</b>	<b>42,908</b>	<b>110,983</b>		
Sep	20,566	226,283	20,641	223,220	18,603	202,230			5,782	112,878	6,227	117,071	6,547	117,530		
Oct	12,761	239,044	11,593	234,813	10,114	212,344			5,136	118,014	5,072	122,143	4,946	122,476		
Nov	12,105	251,149	12,594	247,407	11,230	223,574			6,860	124,874	6,869	129,012	5,812	128,288		
Dec	4,033	255,182	4,434	251,841	4,808	228,382			9,829	134,703	10,211	139,223	8,447	136,735		
<b>Fall</b>	<b>49,465</b>	<b>255,182</b>	<b>49,262</b>	<b>251,841</b>	<b>44,755</b>	<b>228,382</b>			<b>27,607</b>	<b>134,703</b>	<b>28,379</b>	<b>139,223</b>	<b>25,752</b>	<b>136,735</b>		
<b>TOTAL</b>	<b>255,182</b>		<b>251,841</b>		<b>228,382</b>				<b>134,703</b>		<b>139,223</b>		<b>136,735</b>			

## Lee County Visitor Origins (Actual Number of Visitors) 2002 - 2005

	Northeast								Midwest							
	2002		2003		2004		2005		2002		2003		2004		2005	
	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD
Jan	55,765	55,765	54,563	54,563	59,529	59,529	58,472	58,472	84,510	84,510	84,572	84,572	90,426	90,426	83,990	83,990
Feb	93,185	148,950	89,719	144,282	100,184	159,713	94,582	153,054	119,171	203,681	119,797	204,369	131,247	221,673	129,572	213,562
Mar	91,343	240,293	93,276	237,558	99,056	258,769			128,710	332,391	123,394	327,763	129,745	351,418		
April	88,236	328,529	88,679	326,237	93,927	352,696			116,177	448,568	117,739	445,502	127,472	478,890		
<b>Winter</b>	<b>328,529</b>	<b>328,529</b>	<b>326,237</b>	<b>326,237</b>	<b>352,696</b>	<b>352,696</b>			<b>448,568</b>	<b>448,568</b>	<b>445,502</b>	<b>445,502</b>	<b>478,890</b>	<b>478,890</b>		
May	38,093	366,622	41,582	367,819	43,557	396,253			40,465	489,033	43,662	489,164	45,383	524,273		
June	28,434	395,056	33,497	401,316	36,853	433,106			43,661	532,694	45,192	534,356	48,523	572,796		
July	35,470	430,526	39,189	440,505	43,031	476,137			44,919	577,613	49,070	583,426	54,411	627,207		
Aug	18,597	449,123	20,430	460,935	7,030	483,167			27,308	604,921	29,407	612,833	13,129	640,336		
<b>Spr/Sum</b>	<b>120,594</b>	<b>449,123</b>	<b>134,698</b>	<b>460,935</b>	<b>130,471</b>	<b>483,167</b>			<b>156,353</b>	<b>604,921</b>	<b>167,331</b>	<b>612,833</b>	<b>161,446</b>	<b>640,336</b>		
Sept	19,905	469,028	21,068	482,003	11,732	494,899			21,805	626,726	23,456	636,289	14,844	655,180		
Oct	17,819	486,847	18,920	500,923	16,832	511,731			23,655	650,381	25,280	661,569	23,772	678,952		
Nov	29,859	516,706	29,663	530,586	29,061	540,792			33,087	683,468	35,179	696,748	33,790	712,742		
Dec	36,419	553,125	38,024	568,610	36,515	577,307			57,085	740,553	61,537	758,285	57,177	769,919		
<b>Fall</b>	<b>104,002</b>	<b>553,125</b>	<b>107,675</b>	<b>568,610</b>	<b>94,140</b>	<b>577,307</b>			<b>135,632</b>	<b>740,553</b>	<b>145,452</b>	<b>758,285</b>	<b>129,583</b>	<b>769,919</b>		
<b>TOTAL</b>	<b>553,125</b>		<b>568,610</b>		<b>577,307</b>				<b>740,553</b>		<b>758,285</b>		<b>769,919</b>			

## Lee County Visitor Origins (Actual Number of Visitors) 2002 - 2005

	Canada								Europe							
	2002		2003		2004		2005		2002		2003		2004		2005	
	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD
Jan	5,941	5,941	7,015	7,015	7,003	7,003	7,635	7,635	12,839	12,839	15,784	15,784	17,508	17,508	20,495	20,495
Feb	7,612	13,553	7,198	14,213	7,556	14,559	8,201	15,836	10,237	23,076	10,540	26,324	11,194	28,702	12,848	33,343
Mar	9,194	22,747	10,234	24,447	9,116	23,675			22,539	45,615	18,129	44,453	19,143	47,845		
April	7,059	29,806	7,789	32,236	8,945	32,620			21,177	66,792	23,069	67,522	25,558	73,403		
<b>Winter</b>	<b>29,806</b>	<b>29,806</b>	<b>32,236</b>	<b>32,236</b>	<b>32,620</b>	<b>32,620</b>			<b>66,792</b>	<b>66,792</b>	<b>67,522</b>	<b>67,522</b>	<b>73,403</b>	<b>73,403</b>		
May	1,977	31,783	1,386	33,622	1,686	34,306			9,754	76,546	11,089	78,611	12,364	85,767		
June	809	32,592	1,011	34,633	1,228	35,534			11,993	88,539	13,716	92,327	15,355	101,122		
July	1,084	33,676	1,005	35,638	1,245	36,779			14,405	102,944	15,910	108,237	17,782	118,904		
Aug	783	34,459	619	36,257	258	37,037			12,431	115,375	13,207	121,444	10,183	129,087		
<b>Spr/Sum</b>	<b>4,653</b>	<b>34,459</b>	<b>4,021</b>	<b>36,257</b>	<b>4,417</b>	<b>37,037</b>			<b>48,583</b>	<b>115,375</b>	<b>53,922</b>	<b>121,444</b>	<b>55,684</b>	<b>129,087</b>		
Sept	743	35,202	682	36,939	324	37,361			9,994	125,369	9,553	130,997	9,464	138,551		
Oct	1,401	36,603	1,610	38,549	1,255	38,616			12,839	138,208	13,848	144,845	13,215	151,766		
Nov	3,127	39,730	3,018	41,567	2,266	40,882			11,096	149,304	12,385	157,230	12,413	164,179		
Dec	4,285	44,015	4,837	46,404	5,198	46,080			10,585	159,889	11,958	169,188	14,034	178,213		
<b>Fall</b>	<b>9,556</b>	<b>44,015</b>	<b>10,147</b>	<b>46,404</b>	<b>9,043</b>	<b>46,080</b>			<b>44,514</b>	<b>159,889</b>	<b>47,744</b>	<b>169,188</b>	<b>49,126</b>	<b>178,213</b>		
<b>TOTAL</b>	<b>44,015</b>		<b>46,404</b>		<b>46,080</b>				<b>159,889</b>		<b>169,188</b>		<b>178,213</b>			

## Lee County Visitor Origins (Actual Number of Visitors) 2002 - 2005

	Markets of Opportunity								TOTAL							
	2002		2003		2004		2005		2002		2003		2004		2005	
	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD	Monthly	YTD
Jan	7,090	7,090	7,795	7,795	6,179	6,179	7,033	7,033	191,632	191,632	194,867	194,867	205,981	205,981	200,933	200,933
Feb	6,300	13,390	5,913	13,708	5,317	11,496	5,741	12,774	262,492	454,124	257,075	451,942	279,844	485,825	273,359	474,292
Mar	8,600	21,990	9,357	23,065	7,596	19,092			296,567	750,691	292,402	744,344	303,853	789,678		
April	9,412	31,402	11,684	34,749	12,140	31,232			294,120	1,044,811	299,591	1,043,935	319,478	1,109,156		
<b>Winter</b>	<b>31,402</b>	<b>31,402</b>	<b>34,749</b>	<b>34,749</b>	<b>31,232</b>	<b>31,232</b>			<b>1,044,811</b>	<b>1,044,811</b>	<b>1,043,935</b>	<b>1,043,935</b>	<b>1,109,156</b>	<b>1,109,156</b>		
May	2,900	34,302	3,742	38,491	4,075	35,307			131,809	1,176,620	138,608	1,182,543	140,505	1,249,661		
June	4,716	39,018	4,909	43,400	5,067	40,374			134,757	1,311,377	144,383	1,326,926	153,553	1,403,214		
July	5,111	44,129	6,197	49,597	6,401	46,775			154,892	1,466,269	167,476	1,494,402	177,815	1,581,029		
Aug	3,328	47,457	3,095	52,692	1,706	48,481			97,879	1,564,148	103,182	1,597,584	51,689	1,632,718		
<b>Spr/Sum</b>	<b>16,055</b>	<b>47,457</b>	<b>17,943</b>	<b>52,692</b>	<b>17,249</b>	<b>48,481</b>			<b>519,337</b>	<b>1,564,148</b>	<b>553,649</b>	<b>1,597,584</b>	<b>523,562</b>	<b>1,632,718</b>		
Sept	3,799	51,256	3,668	56,360	3,306	51,787			82,594	1,646,742	85,295	1,682,879	64,820	1,697,538		
Oct	4,202	55,458	4,187	60,547	3,691	55,478			77,813	1,724,555	80,510	1,763,389	73,825	1,771,363		
Nov	4,741	60,199	4,371	64,918	3,940	59,418			100,875	1,825,430	104,079	1,867,468	98,512	1,869,875		
Dec	3,780	63,979	3,359	68,277	3,768	63,186			126,016	1,951,446	134,360	2,001,828	129,947	1,999,822		
<b>Fall</b>	<b>16,522</b>	<b>63,979</b>	<b>15,585</b>	<b>68,277</b>	<b>14,705</b>	<b>63,186</b>			<b>387,298</b>	<b>1,951,446</b>	<b>404,244</b>	<b>2,001,828</b>	<b>367,104</b>	<b>1,999,822</b>		
<b>TOTAL</b>	<b>63,979</b>		<b>68,277</b>		<b>63,186</b>				<b>1,951,446</b>		<b>2,001,828</b>		<b>1,999,822</b>			