



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

**April 2010 Visitor Profile and Occupancy Analysis  
June 11, 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 April 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 more than 240,000 visitors staying in paid accommodations during the month of April 2010, and about 242,000 staying with friends or relatives while visiting, for a total of 482,853 visitors.
- Total visitation for April 2010 was up (3.5%) year-over-year. This was due to a large increase among those staying in paid accommodations (18.4%) from April 2009 to April 2010. Visitation decreased among those staying with friends and relatives (-8.0%). For the fiscal year-to-date, 2010 total visitation was slightly below that in the prior year (-1.5%).
- U.S. residents accounted for 87% of those staying in paid accommodations in April 2010 – the same proportion as in April 2009. Canada and Germany contributed the largest share of international visitors staying in paid accommodations (4% each) during April 2010.
- More than half of domestic visitors staying in paid accommodations during April 2010 were from the Midwest (58%) followed by the Northeast (21%), South (14%), and West (2%). The Grand Rapids DMA drew the largest share of domestic visitors staying in paid accommodations (8%) with Detroit (7%), Columbus, OH (6%) and New York as close runners-up.

### Visitor Expenditures

- The average per person per day expenditure was \$119.19 in April 2010 – a 10.5% decline from April 2009 (\$133.16). Although a decline year-over-year, the April 2010 average expenditure was on par with the first three months of 2010, each of these months posting a decline as well.
- Total visitor expenditures for April 2010 are estimated at \$258 million, a 4.8% drop from \$271 million in April 2009. From April 2009 to April 2010, expenditures decreased 7.0% among those staying in paid accommodations and decreased 2.0% among those staying with friends and relatives. The decrease in expenditures on lodging (-3.8%), driven primarily by a drop in average daily rate, contributed to the overall decline in expenditures among those staying in paid accommodations.



Total April Visitation					
	%		Visitor Estimates		% Change
	2009	2010	2009	2010	2009-2010
Paid Accommodations	44%	50%	203,378	240,698	18.4%
Friends/Relatives	56%	50%	<u>263,237</u>	<u>242,155</u>	-8.0%
<i>Total Visitation</i>			466,615	482,853	3.5%
April Visitor Origin - Visitors Staying in Paid Accommodations					
	2009	2010	2009	2010	
United States	87%	87%	176,165	210,400	19.4%
Canada	5%	4%	10,026	10,099	0.7%
Germany	2%	4%	4,297	10,099	135.0%
Austria	--	1%	--	1,683	--
BeNeLux	1%	1%	1,432	1,683	17.5%
France	--	1%	--	1,683	--
UK	3%	1%	5,729	1,683	-70.6%
Scandinavia	1%	1%	1,432	1,683	17.5%
Switzerland	2%	--	4,297	--	--
Other	--	1%	--	1,683	--
U.S. Region (Paid Accommodations)					
	2009	2010	2009	2010	
Florida	7%	2%	12,890	3,366	-73.9%
South (including Florida)	14%	14%	24,348	28,614	17.5%
Midwest	55%	58%	95,960	122,874	28.0%
Northeast	25%	21%	44,399	43,763	-1.4%
West	2%	2%	2,864	3,366	17.5%
No Answer	6%	6%	10,026	11,782	17.5%

2010 Top DMAs (Paid Accommodations)		
Grand Rapids	8%	16,668
Detroit	7%	14,962
Columbus, OH	6%	13,534
New York	6%	13,385
Fort Wayne	5%	9,679
Milwaukee	4%	8,454
Toledo	4%	8,103



### Trip Planning

- Among April 2010 visitors staying in paid accommodations almost all (94%) reserved accommodations before leaving home – a significant increase from April 2009 (84%).
- When deciding to visit Lee County, April 2010 visitors were more likely than April 2009 visitors to say the following attributes influenced their selection:
  - *Peaceful/Relaxing* (87% vs. 77%)
  - *Clean, unspoiled environment* (73% vs. 61%)
  - *Convenient location* (69% vs. 60%)
  - *Plenty to see and do* (64% vs. 52%)

### Visitor Profile

- Similar to last April, the majority of Lee County visitors are repeat visitors (77%). Among repeat visitors, the average number of visits to Lee County in the past five was 4.2.
- About a third of April 2010 visitors indicated they were staying in a hotel/motel/resort/B&Bs for their lodging (29%) – a slightly lower proportion when compared with April 2009 (37%). A sizable minority said they stayed in a condo/vacation home (44%) and nearly one in five at the home of a friend or family member (16%). Slightly fewer than half felt that the quality of accommodations far exceeded or exceeded their expectations (42%) in April 2010 about the same as April 2009.
- The top activities enjoyed while in Lee County during April 2010 were going to the beach (95%), relaxing (79%), and dining out (76%). April 2010 visitors were more likely to go to the beaches (95% vs. 87%), go bicycle riding (23% vs. 14%), or attend cultural events (9% vs. 2%) than those visiting in April 2009.
- Overall, visitor satisfaction remains extremely high, with 94% of April 2010 visitors reporting being *very satisfied* or *satisfied* with their visit. The vast majority indicated they were likely to return to Lee County (90%), and slightly more than half of them are likely to return next year (54%).



- April 2010 visitors most frequently mentioned *traffic* (60%) as the least liked feature about the Lee County area during their trip. Far fewer mentioned *beach seaweed* (14%), *insects* (13%), and *high prices* (12%), however, the proportion citing *insects* was significantly higher than in April 2009. Visitors' concerns about Red Tide (5% vs. 12%) and quality of accommodations (2% vs. 5%) were less prevalent during April 2010 than during the prior year.
- The demographic composition of April 2010 visitors was similar to that of April 2009 visitors. April 2010 visitors averaged 49.7 years of age with an average household income of approximately \$109,000. The majority of visitors were married (79%) and half were traveling as a family (48%). They traveled in parties of about four people on average.



### Lodging Property Manager Assessments

- For the Lee County lodging industry in total, the number of available room nights and occupied room nights in April 2010 was in line with the same time period in 2009 (+1.1% and -0.4% respectively). Hotel/motel/resort available room nights were up slightly 2.9% from a year ago as were occupied room nights (0.7%). Condo/vacation home properties saw increases in both available and occupied room nights while RV park/campground properties saw decreases, particularly with available room nights (12.4%).

	Occupied Room Nights			Available Room Nights		
	2009	2010	% Change	2009	2010	% Change
Hotel/Motel/Resort/B&B	205,382	206,858	0.7%	344,950	354,870	2.9%
Condo/Cottage/Vacation Home	91,870	95,946	4.4%	146,370	151,830	3.7%
RV Park/Campground	79,660	78,157	-1.9%	145,350	127,330	-12.4%
<b>Total</b>	<b>376,912</b>	<b>380,961</b>	<b>1.1%</b>	<b>636,670</b>	<b>634,030</b>	<b>-0.4%</b>

- Average occupancy rates increased from 59.2% in April 2009 to an average of 60.1% in April 2010 (+1.5%). The increase in inventory for hotels/motels/resorts caused occupancy rates to decline slightly (-2.1%). Occupancy rates for condos/cottages were about the same as April 2009 (+0.7%) while RV parks/campgrounds saw a greater rise in occupancy rates (+12.0%).
- Overall average daily rates dropped from \$142.16 to \$135.24 year-over-year (-4.9%). This decline was the result of ADR decreases for hotel/motel/resort (-6.4%) and condo/vacation home properties (-5.1%).
- RevPAR was down 3.4% from April 2009 driven by decreases for hotels/motels/resorts (-8.3%) and condo/vacation home properties (-4.4%).

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2009	2010	% Change	2009	2010	% Change	2009	2010	% Change
Property Managers Responding	159	142		159	146		159/159	142/146	
Hotel/Motel/Resort/B&B	59.5%	58.3%	-2.1%	\$157.42	\$147.39	-6.4%	\$93.73	\$85.92	-8.3%
Condo/Cottage/Vacation Home	62.8%	63.2%	0.7%	\$194.50	\$184.60	-5.1%	\$122.08	\$116.66	-4.4%
RV Park/Campground	54.8%	61.4%	12.0%	\$42.47	\$42.46	--	\$23.27	\$26.06	12.0%
<b>AVERAGE</b>	<b>59.2%</b>	<b>60.1%</b>	<b>1.5%</b>	<b>\$142.16</b>	<b>\$135.24</b>	<b>-4.9%</b>	<b>\$84.16</b>	<b>\$81.26</b>	<b>-3.4%</b>



- According to property managers, average party size was slightly larger in April 2010 when compared with April 2009 (2.7 vs. 2.5 respectively) while average length of stay was somewhat shorter (5.9 vs. 6.4 respectively). Coupled with a very slight increase in occupied room nights, the net effect was an increase in estimated visitor volume year-over-year.
- As seen in previous months, property managers in April 2010 continue to be somewhat more positive when comparing their current month's occupancy and revenue year-over-year. Nearly two-thirds report their April 2010 occupancy was the same or better than the prior year (64% vs. 54% April 2009). Likewise, more than half reported their revenue was the same or better than the prior year (58% vs. 47% April 2009).
- Projections for the next three months (May - July) also appear to be more optimistic. Fully half of property managers reported that their total level of reservations for the next three months are the same or better (50%) than the same period from the prior year, while less than half (44%) reported that their reservations are down.





## April 2010 Lee County Snapshot

Total April Visitation				
	%		Visitor Estimates	
	2009	2010	2009	2010
Paid Accommodations	44%	50%	203,378	240,698
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Germany	2%	4%	4,297	10,099
Austria	--	1%	--	1,683
BeNeLux	1%	1%	1,432	1,683
France	--	1%	--	1,683
UK	3%	1%	5,729	1,683
Scandinavia	1%	1%	1,432	1,683
Switzerland	2%	--	4,297	--
Other	--	1%	--	1,683

Total Visitor Expenditures			
	2009	2010	% Change
Total Visitor Expenditures	\$270,752,873	\$257,804,660	-4.8%
Paid Accommodations	\$150,883,273	\$140,311,336	-7.0%

Average Per Person Per Day Expenditures		
2009	2010	% Change
\$133.16	\$119.19	-10.5%

First-Time/Repeat Visitors to Lee County		
	2009	2010
First-time	25%	22%
Repeat	73%	77%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2009	2010	% Change	2009	2010	% Change	2009	2010	% Change
Property Managers Responding	159	142		159	146		159/159	142/146	
Hotel/Motel/Resort/B&B	59.5%	58.3%	-2.1%	\$157.42	\$147.39	-6.4%	\$93.73	\$85.92	-8.3%
Condo/Cottage/Vacation Home	62.8%	63.2%	0.7%	\$194.50	\$184.60	-5.1%	\$122.08	\$116.66	-4.4%
RV Park/Campground	54.8%	61.4%	12.0%	\$42.47	\$42.46	--	\$23.27	\$26.06	12.0%
<b>AVERAGE</b>	<b>59.2%</b>	<b>60.1%</b>	<b>1.5%</b>	<b>\$142.16</b>	<b>\$135.24</b>	<b>-4.9%</b>	<b>\$84.16</b>	<b>\$81.26</b>	<b>-3.4%</b>



## Visitor Profile Analysis April 2010

*A total of 204 interviews were conducted with visitors in Lee County during the month of April 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 211 interviews were conducted with visitors in Lee County during the month of April 2009. A total sample of this size is considered accurate to plus or minus 6.7 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.*



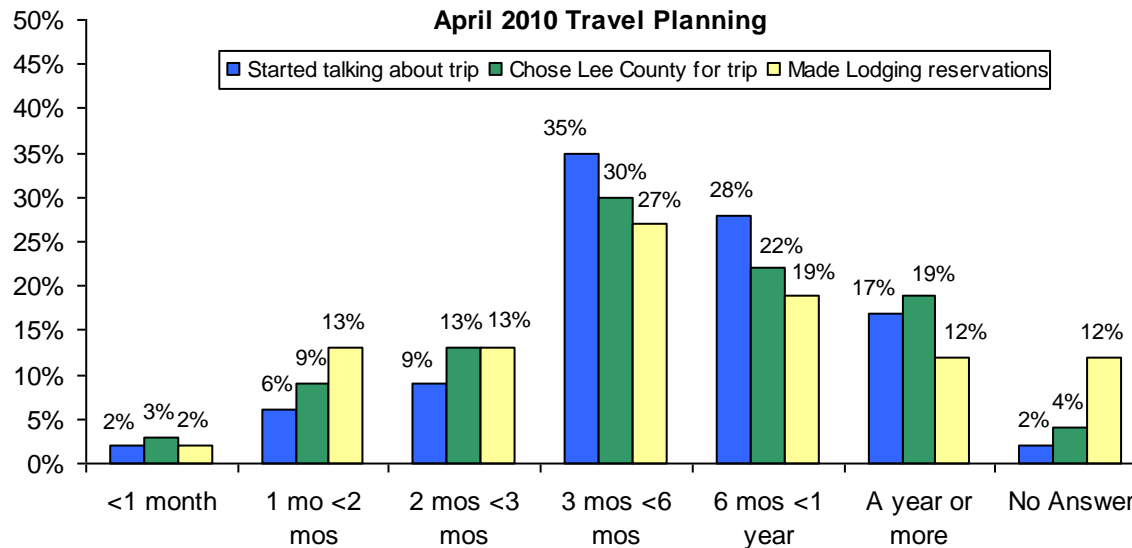
## Travel Planning

	Started Talking About Trip		Chose Lee County for Trip		Made Lodging Reservations	
	2009	2010	2009	2010	2009	2010
Total Respondents	211	204	211	204	211	204
<1 month	3%	2%	6%	3%	3%	2%
1 mo - < 2 mos	8%	6%	10%	9%	10%	13%
2 mos - < 3 mos	8%	9%	9%	13%	15%	13%
3 mos - < 6 mos	37%	35%	31%	30%	27%	27%
6 mos - <1 year	24%	28%	22%	22%	18%	19%
A year or more	19%	17%	19%	19%	11%	12%
No answer	2%	2%	3%	4%	16%	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		
	April	
	2009	2010
Total Respondents	211	204
Before leaving home	78%	<85%>
After arriving in Florida	4%	2%
On the road, but not in Florida	1%	--
No Answer	17%	13%

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

Reserved Accommodations		
	April	
	2009	2010
Total Respondents Staying in Paid Accommodations	142	143
Before leaving home	84%	<94%>
After arriving in Florida	5%	2%
On the road, but not in Florida	2%	--
No Answer	9%	4%

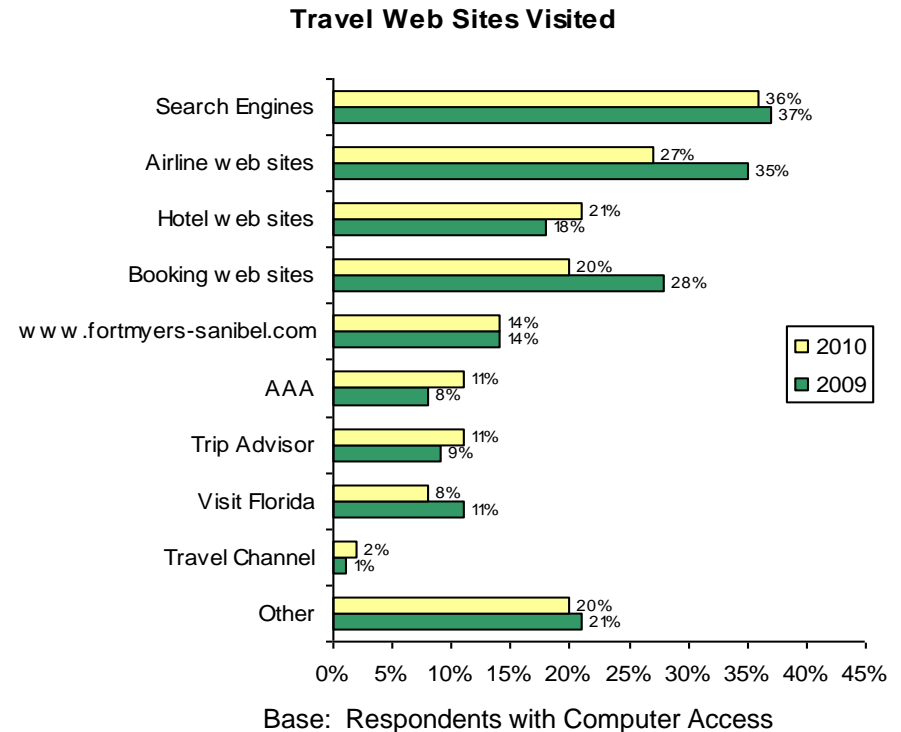
Q6: Did you make accommodation reservations for your stay in Lee County?

## Travel Planning



Travel Web Sites Visited by April Travelers		
	2009	2010
<b>Total Respondents with Computer Access</b>	<b>203</b>	<b>190</b>
Visited web sites (net)	78%	80%
Search Engines	37%	36%
Airline web sites	35%	27%
Hotel web sites	18%	21%
Booking web sites	28%	20%
www.fortmyers-sanibel.com	14%	14%
AAA	8%	11%
Trip Advisor	9%	11%
Visit Florida	11%	8%
Travel Channel	1%	2%
Other	21%	20%
Did not visit web sites	19%	16%
No Answer	3%	4%

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



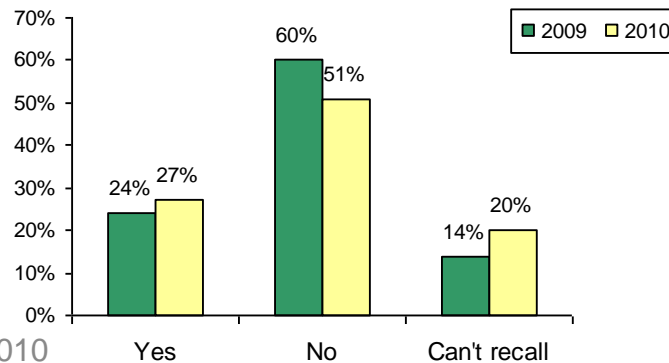
## Travel Planning



April Travelers Requesting Information		
	2009	2010
Total Respondents	211	204
Requested information (net)	<u>30%</u>	<u>33%</u>
Hotel Web Site	11%	13%
VCB Web Site	7%	10%
Visitor Guide	4%	7%
Call hotel	5%	6%
E-Newsletter	1%	--
Call VCB	1%	--
Other	11%	8%
Did not request information	<u>53%</u>	<u>51%</u>
No Answer	17%	16%

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

### Recall of Promotions



April 2010

14

Travel Agent Assistance		
	2009	2010
Total Respondents	211	204
Yes	3%	6%
No	95%	92%

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

Recall of Lee County Promotions		
	2009	2010
Total Respondents	211	204
Yes	24%	27%
No	60%	51%
Can't recall	14%	20%

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

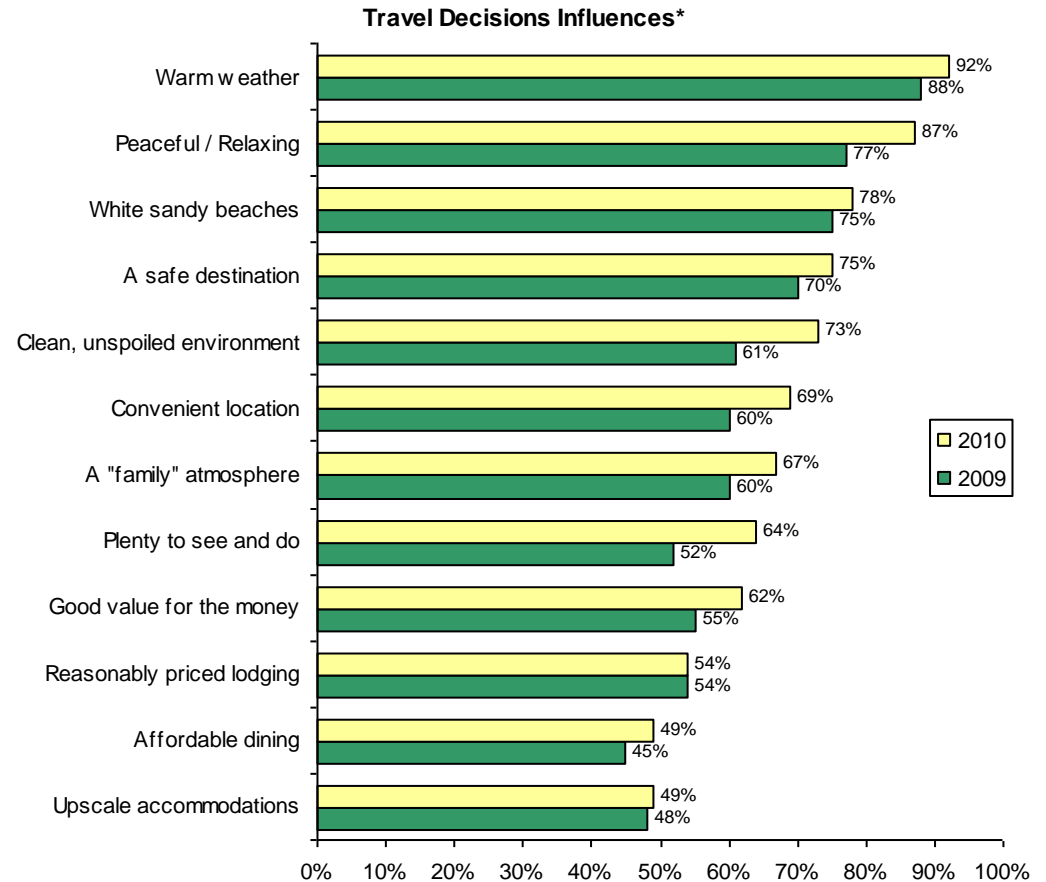
# Travel Planning



April Travel Decision Influences*		
	2009	2010
Total Respondents	211	204
Warm weather	88%	92%
Peaceful / Relaxing	77%	<87%>
White sandy beaches	75%	78%
A safe destination	70%	75%
Clean, unspoiled environment	61%	<73%>
Convenient location	60%	<69%>
A "family" atmosphere	60%	67%
Plenty to see and do	52%	<64%>
Good value for the money	55%	62%
Reasonably priced lodging	54%	54%
Affordable dining	45%	49%
Upscale accommodations	48%	49%

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

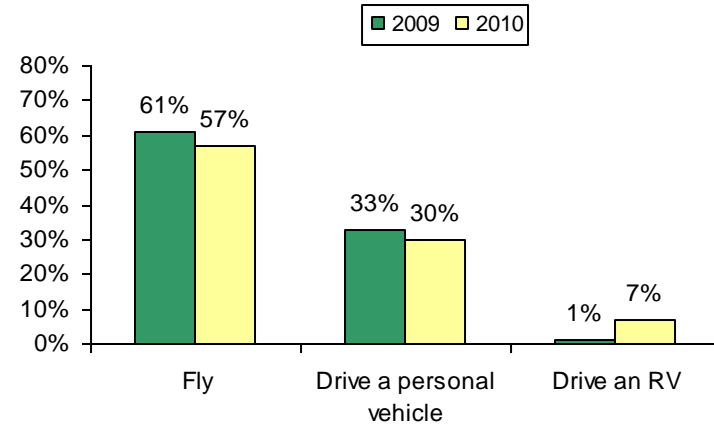
Mode of Transportation		
	2009	2010
Total Respondents	211	204
Fly	61%	57%
Drive a personal vehicle	33%	30%
Drive an RV	1%	<7%>
Drive a rental vehicle	3%	6%
Travel by bus	<1%>	--
Other/No Answer (net)	1%	--

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

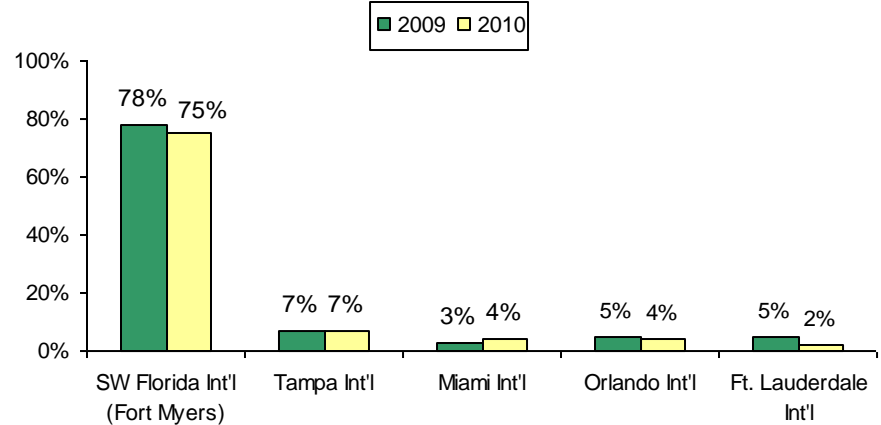
Airport		
	2009	2010
Total Respondents who arrived by air	130	117
SW Florida Int'l (Fort Myers)	78%	75%
Tampa Int'l	7%	7%
Miami Int'l	3%	4%
Orlando Int'l	5%	4%
Ft. Lauderdale Int'l	5%	2%
Sarasota / Bradenton	1%	--
West Palm Beach Int'l	--	--
Other/No Answer (net)	1%	<9%>

Q2: At which Florida airport did you land?

### Mode of Transportation



### Airport



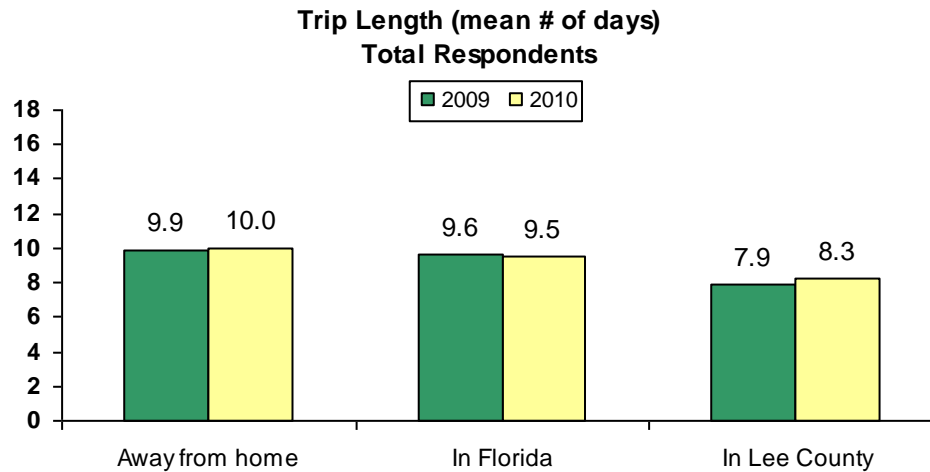




## Trip Profile

April Trip Length Mean # of Days			
	Total Respondents		
	2009	2010	% Change
Total Respondents	211	204	
Away from home	9.9	10.0	1.0%
In Florida	9.6	9.5	-1.0%
In Lee County	7.9	8.3	5.1%

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



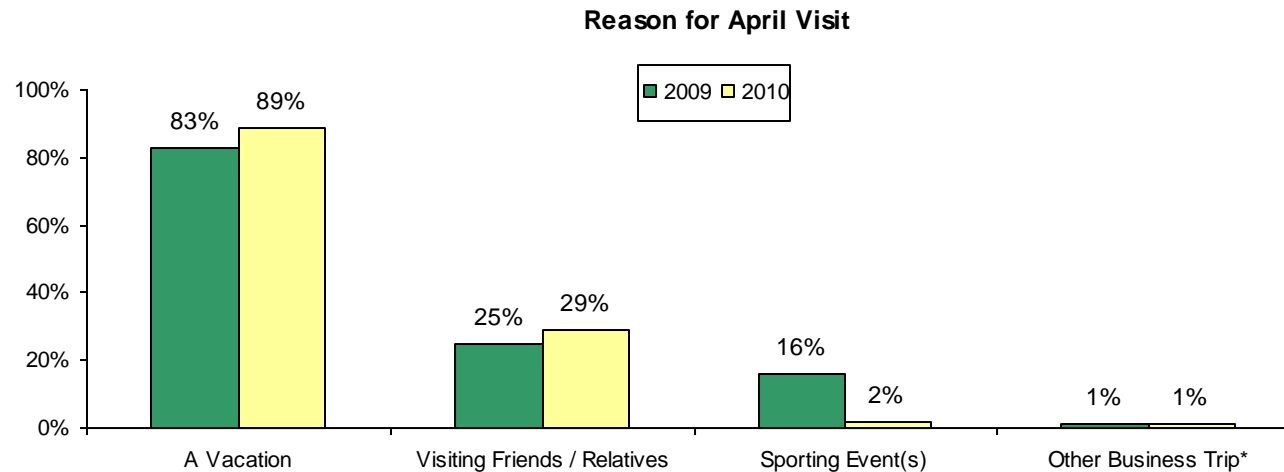


## Trip Profile

Reason for April Visit		
	2009	2010
Total Respondents	211	204
A Vacation	83%	89%
Visiting Friends / Relatives	25%	29%
Sporting Event(s)	<16%>	2%
Other Business Trip*	1%	1%
A Conference / Meeting*	--	<1%
A Convention / Trade Show*	<1%	--
Personal Business	1%	--
Other/No Answer	<5%>	2%

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

\*Note: These answer categories were revised in July 2009. Therefore, year-over-year results are not directly comparable.



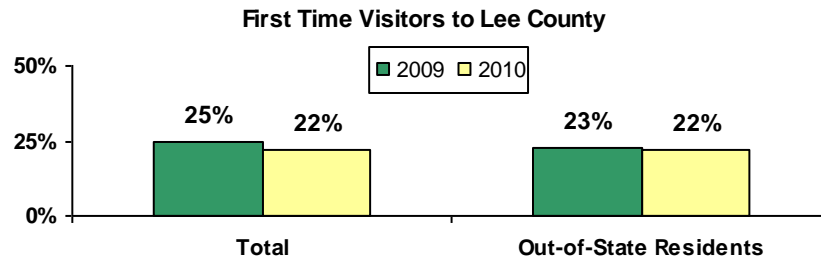


## Trip Profile

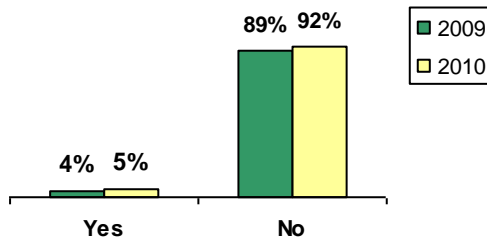
First Time Visitors to Lee County								
	TOTAL		Florida Residents		Out-of-State Residents		International Visitors	
	2009	2010	2009	2010	2009	2010	2009	2010
Total Respondents	211	204	14*	5*	165	165	21*	25*
Yes	25%	22%	N/A	N/A	23%	22%	N/A	N/A
No	73%	77%	N/A	N/A	75%	78%	N/A	N/A
No Answer	2%	1%	N/A	N/A	2%	1%	N/A	N/A

Q20: Is this your first visit to Lee County?

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



**First Time Visitors to Florida**



First Time Visitors to Florida		
	2009	2010
Total Respondents	211	204
Yes	4%	5%
No	89%	92%
No answer	1%	<1%
<i>FL Residents*</i>	<7%>	3%

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.

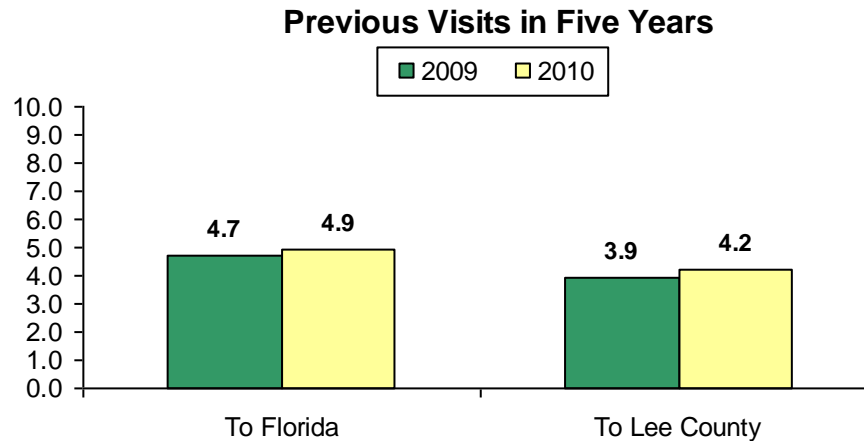


## Trip Profile

Previous Visits in Five Years				
	Mean # of Visits to Florida		Mean # of Visits to Lee County	
	2009	2010	2009	2010
Base: Repeat Visitors	187 (FL res. Excl.)	188 (FL res. Excl.)	154	156
Number of visits	4.7	4.9	3.9	4.2

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

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

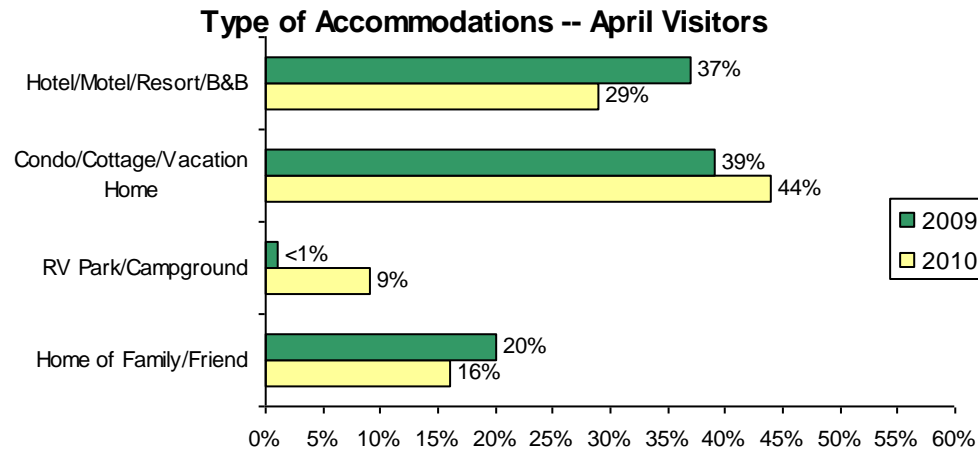




## Trip Profile

Type of Accommodations - April Visitors		
	2009	2010
Total Respondents	211	204
<b>Hotel/Motel/Resort/B&amp;B</b>	<b>37%</b>	<b>29%</b>
Hotel/motel/inn	<23%>	11%
Resort	13%	16%
B&B	2%	1%
<b>Condo/Cottage/Vacation Home</b>	<b>39%</b>	<b>44%</b>
Rented home/condo	30%	32%
Borrowed home/condo	4%	4%
Owned home/condo	5%	8%
<b>RV Park/Campground</b>	<b>&lt;1%</b>	<b>9%</b>
<b>Home of family/friend</b>	<b>20%</b>	<b>16%</b>
<b>Day trip (no accommodations)</b>	<b>3%</b>	<b>2%</b>

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



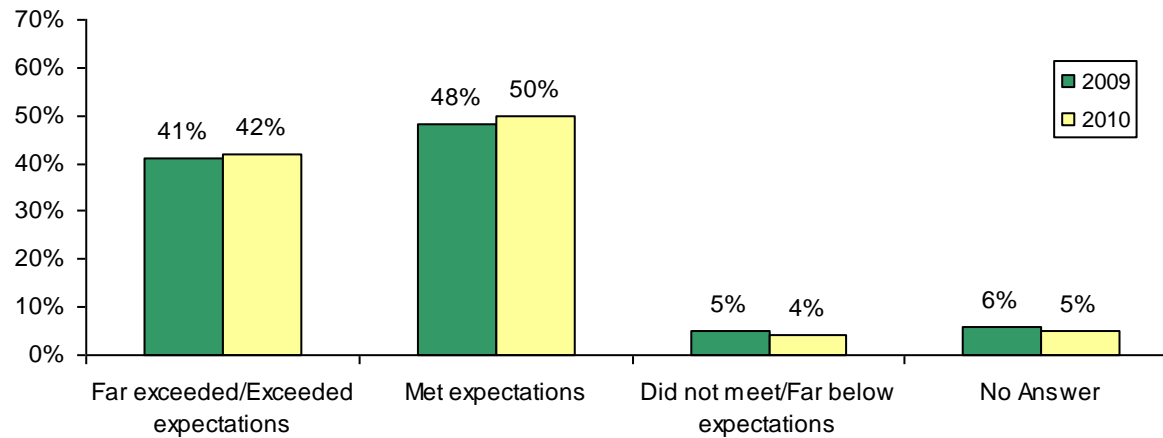


## Trip Profile

Quality of Accommodations		
	2009	2010
Total Respondents	211	204
Far exceeded/Exceeded expectations	41%	42%
Met your expectations	48%	50%
Did not meet/Far below expectations	5%	4%
No Answer	6%	5%

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

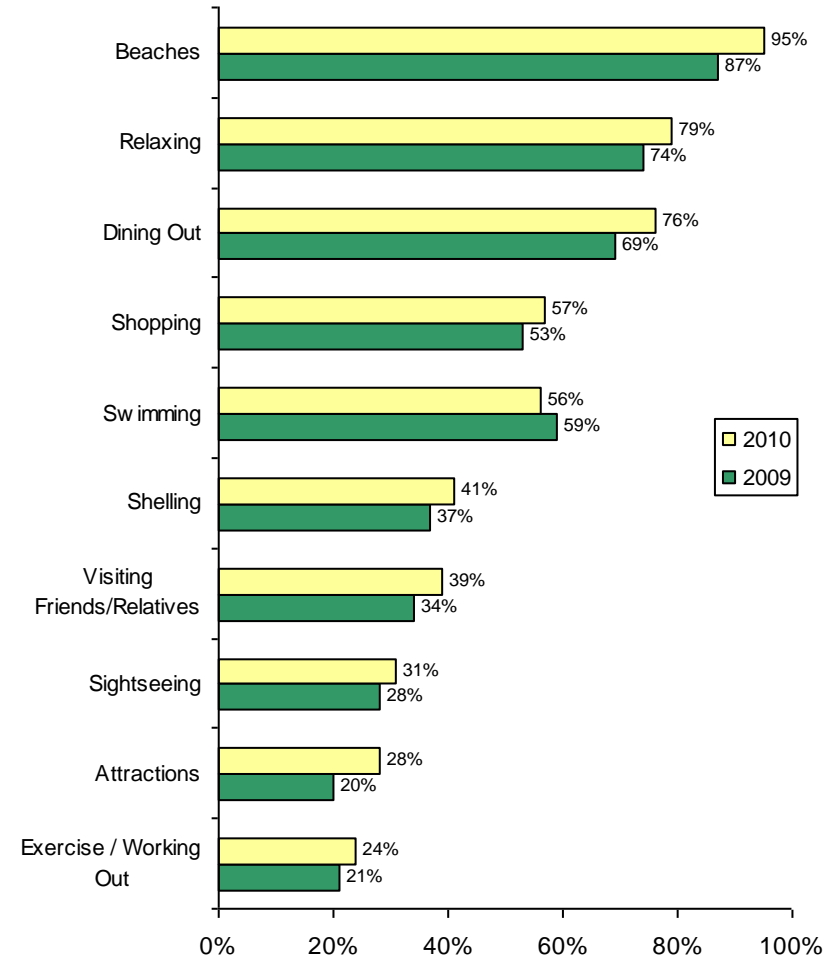
### Quality of Accommodations



## Trip Activities



April Activities Enjoyed		
	2009	2010
Total Respondents	211	204
Beaches	87%	<95%>
Relaxing	74%	79%
Dining Out	69%	76%
Shopping	53%	57%
Swimming	59%	56%
Shelling	37%	41%
Visiting Friends/Relatives	34%	39%
Sightseeing	28%	31%
Attractions	20%	28%
Exercise / Working Out	21%	24%
Photography	19%	23%
Bicycle Riding	14%	<23%>
Watching Wildlife	21%	22%
Bars / Nightlife	17%	17%
Birdwatching	14%	14%
Miniature Golf	10%	14%
Golfing	11%	11%
Fishing	12%	10%
Parasailing / Jet Skiing	5%	10%
Cultural Events	2%	<9%>
Boating	12%	9%
Kayaking / Canoeing	6%	8%
Sporting Event	<23%>	6%
Tennis	6%	6%
Guided Tour	7%	4%
Scuba Diving / Snorkeling	3%	2%
Other	5%	3%
No Answer	2%	2%



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

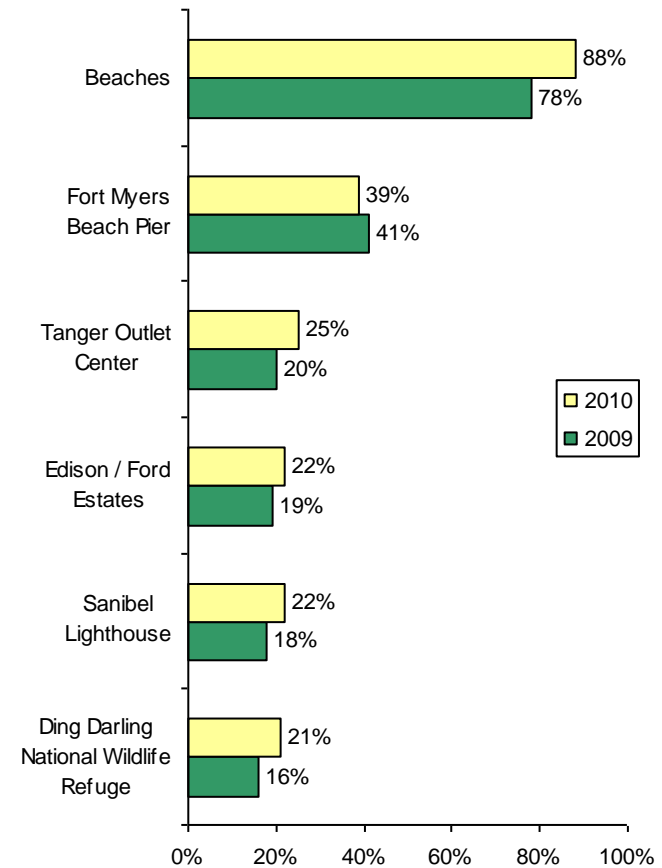
April 2010

## Trip Activities



April Attractions Visited		
	2009	2010
Total Respondents	211	204
Beaches	78%	<88%>
Fort Myers Beach Pier	41%	39%
Tanger Outlet Center	20%	25%
Edison / Ford Estates	19%	22%
Sanibel Lighthouse	18%	22%
Ding Darling National Wildlife Refuge	16%	21%
Miromar Outlets Mall	19%	20%
Coconut Point Mall	7%	12%
Bell Tower Shops	15%	12%
Edison Mall	7%	11%
Shell Factory and Nature Park	6%	11%
Periwinkle Place	10%	11%
Gulf Coast Town Center	3%	5%
Broadway Palm Dinner Theater	--	5%
Manatee Park	4%	5%
Bailey-Matthews Shell Museum	3%	3%
Barbara B. Mann Performing Arts Hall	1%	2%
Babcock Wilderness Adventures	1%	<1%>
Other	<17%>	7%

April Attractions Visited



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



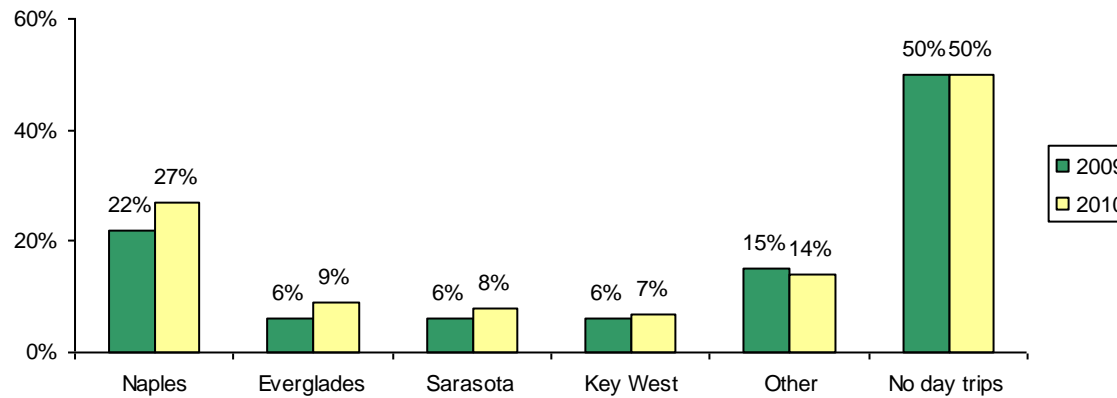


## Trip Activities

April Day Trips Outside Lee County		
	2009	2010
<b>Total Respondents</b>	<b>211</b>	<b>204</b>
<u>Any day trips (NET)</u>	<u>41%</u>	<u>45%</u>
<i>Naples</i>	22%	27%
<i>Everglades</i>	6%	9%
<i>Sarasota</i>	6%	8%
<i>Key West</i>	6%	7%
<i>Other</i>	15%	14%
<u>No day trips</u>	<u>50%</u>	<u>50%</u>
No Answer	9%	5%

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

### April Day Trips Outside Lee County



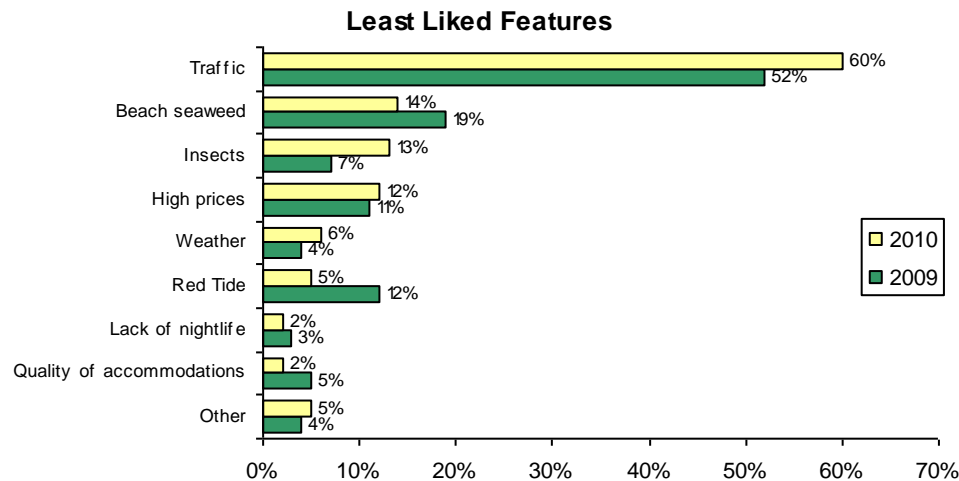


## Trip Activities

Least Liked Features		
	2009	2010
Total Respondents	211	204
Traffic	52%	60%
Beach seaweed	19%	14%
Insects	7%	<13%>
High prices	11%	12%
Weather	4%	6%
Red Tide	<12%>	5%
Lack of nightlife	3%	2%
Quality of accommodations	<5%>	2%
Other	4%	5%
Nothing/No Answer	26%	23%

Q34: During the 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.

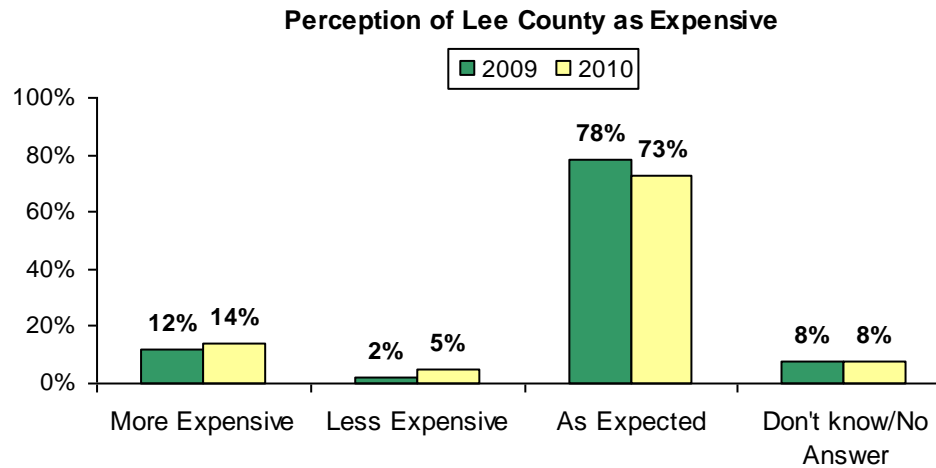




## Trip Activities

Perception of Lee County as Expensive		
	2009	2010
Total Respondents	211	204
More Expensive	12%	14%
Less Expensive	2%	5%
As Expected	78%	73%
Don't know/No Answer	8%	8%

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



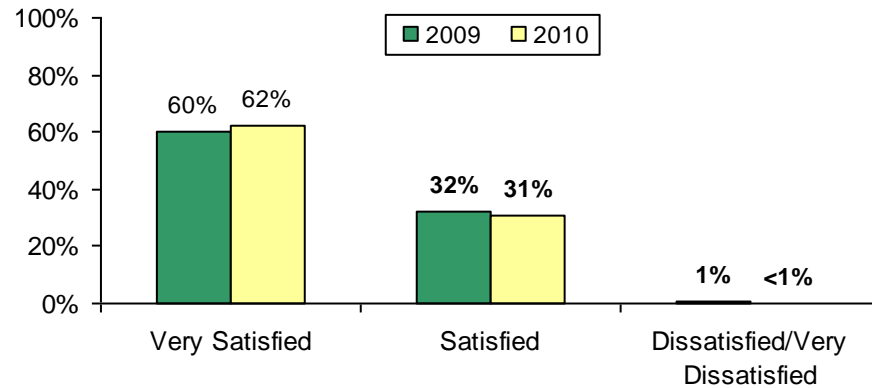


## Lee County Experience

Satisfaction with Visit		
	2009	2010
<b>Total Respondents</b>	<b>211</b>	<b>204</b>
<u>Satisfied</u>	<u>92%</u>	<u>94%</u>
<i>Very Satisfied</i>	60%	62%
<i>Satisfied</i>	32%	31%
Neither	3%	3%
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

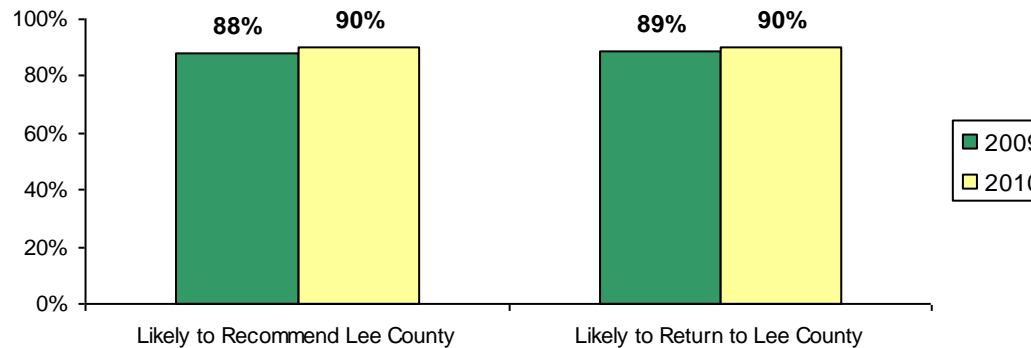
Likelihood to Recommend/Return to Lee County		
	2009	2010
Total Respondents	211	204
Likely to Recommend Lee County	88%	90%
Likely to Return to Lee County	89%	90%
Base: Total Respondents Planning to Return	189	184
Likely to Return Next Year	57%	54%

Q32: Would you recommend Lee County to a friend?

Q35: Will you come back to Lee County?

Q36: Will you come back next year?

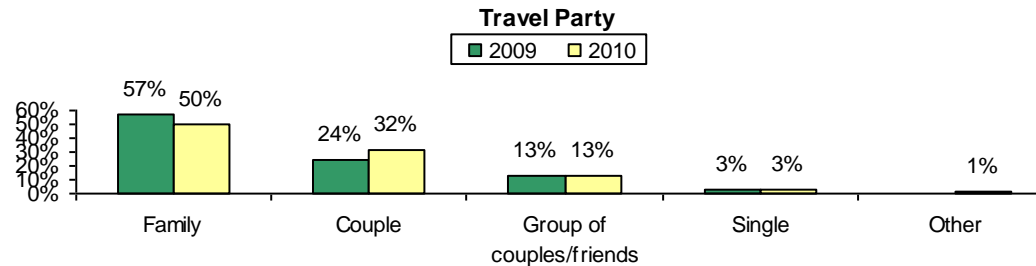
### Likelihood to Recommend/Return to Lee County (Responded "Yes")





## Visitor and Travel Party Demographic Profile

April Travel Party		
	2009	2010
Total Respondents	211	204
Family	57%	50%
Couple	24%	32%
Group of couples/friends	13%	13%
Single	3%	3%
Other	--	1%
Mean travel party size	3.8	3.9
Mean adults in travel party	2.7	2.8



Travel Parties with Children		
	2009	2010
Total Respondents	211	204
Traveling with any Children (net)	<u>53%</u>	<u>48%</u>
Any younger than 6	11%	15%
Any 6 - 11 years old	24%	23%
Any 12 - 17 years old	37%	30%

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:

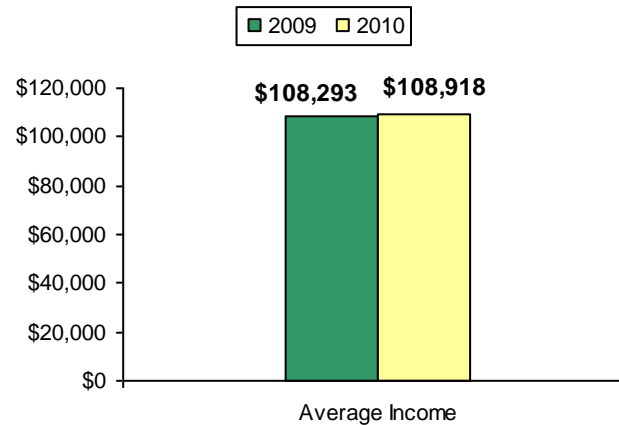
Younger than 6 years old/6-11 years old/12-17 years old/Adults



## Visitor and Travel Party Demographic Profile

April Visitor Demographic Profile		
	2009	2010
Total Respondents	211	204
Vacations per year (mean)	2.5	2.7
Short getaways per year (mean)	4.0	3.7
Age of respondent ( mean)	46.9	49.7
Annual household income (mean)	\$108,293	\$108,918
Marital Status		
Married	80%	79%
Single	10%	11%
Other	9%	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 April Visitation					
	%		Visitor Estimates		% Change
	2009	2010	2009	2010	2009-2010
Paid Accommodations	44%	50%	203,378	240,698	18.4%
Friends/Relatives	56%	50%	<u>263,237</u>	<u>242,155</u>	-8.0%
<i>Total Visitation</i>			466,615	482,853	3.5%
April Visitor Origin - Visitors Staying in Paid Accommodations					
	2009	2010	2009	2010	
United States	87%	87%	176,165	210,400	19.4%
Canada	5%	4%	10,026	10,099	0.7%
Germany	2%	4%	4,297	10,099	135.0%
Austria	--	1%	--	1,683	--
BeNeLux	1%	1%	1,432	1,683	17.5%
France	--	1%	--	1,683	--
UK	3%	1%	5,729	1,683	-70.6%
Scandinavia	1%	1%	1,432	1,683	17.5%
Switzerland	2%	--	4,297	--	--
Other	--	1%	--	1,683	--
U.S. Region (Paid Accommodations)					
	2009	2010	2009	2010	
Florida	7%	2%	12,890	3,366	-73.9%
South (including Florida)	14%	14%	24,348	28,614	17.5%
Midwest	55%	58%	95,960	122,874	28.0%
Northeast	25%	21%	44,399	43,763	-1.4%
West	2%	2%	2,864	3,366	17.5%
No Answer	6%	6%	10,026	11,782	17.5%

2010 Top DMAs (Paid Accommodations)		
Grand Rapids	8%	16,668
Detroit	7%	14,962
Columbus, OH	6%	13,534
New York	6%	13,385
Fort Wayne	5%	9,679
Milwaukee	4%	8,454
Toledo	4%	8,103





## Occupancy Data Analysis April 2010

*Property managers representing 152 properties in Lee County were interviewed for the April 2010 Occupancy Survey between May 1 and May 15, 2010, a sample considered accurate to plus or minus 8.0 percentage points at the 95% confidence level.*

*Property managers representing 167 properties in Lee County were interviewed for the April 2009 Occupancy Survey between May 1 and May 15, 2009, a sample considered accurate to plus or minus 7.6 percentage points at the 95% confidence level.*

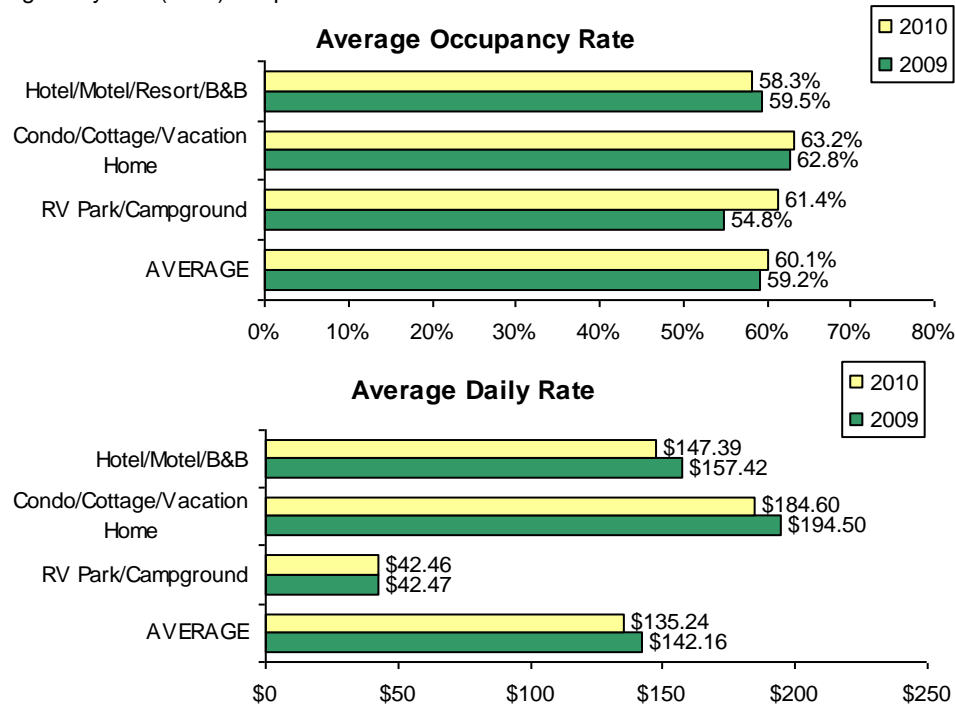


## April Occupancy/Daily Rates

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2009	2010	% Change	2009	2010	% Change	2009	2010	% Change
Property Managers Responding	159	142		159	146		159/159	142/146	
Hotel/Motel/Resort/B&B	59.5%	58.3%	-2.1%	\$157.42	\$147.39	-6.4%	\$93.73	\$85.92	-8.3%
Condo/Cottage/Vacation Home	62.8%	63.2%	0.7%	\$194.50	\$184.60	-5.1%	\$122.08	\$116.66	-4.4%
RV Park/Campground	54.8%	61.4%	12.0%	\$42.47	\$42.46	--	\$23.27	\$26.06	12.0%
AVERAGE	59.2%	60.1%	1.5%	\$142.16	\$135.24	-4.9%	\$84.16	\$81.26	-3.4%

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

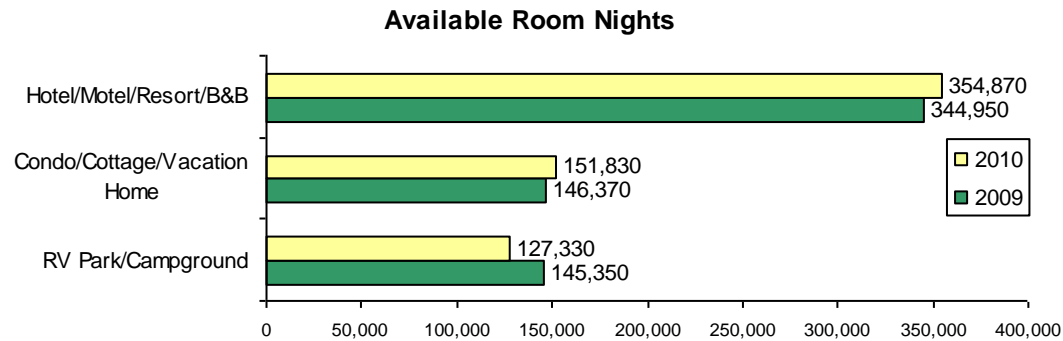
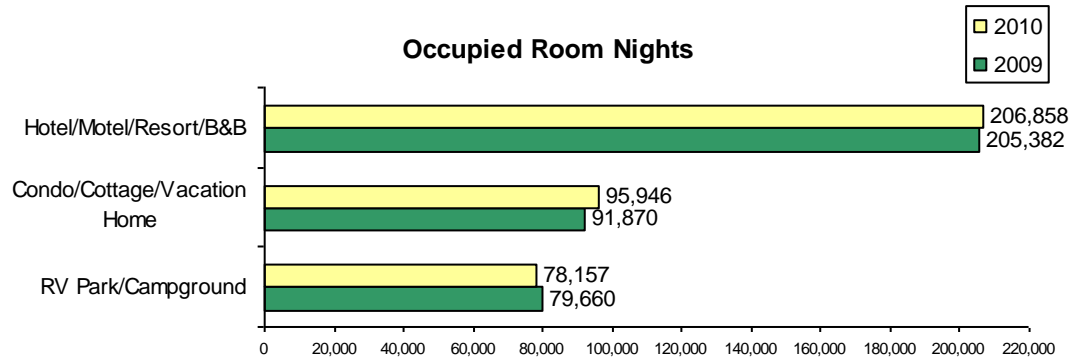
Q17: What was your average daily rate (ADR) in April?





## April Room/Unit/Site Nights

	Occupied Room Nights			Available Room Nights		
	2009	2010	% Change	2009	2010	% Change
Hotel/Motel/Resort/B&B	205,382	206,858	0.7%	344,950	354,870	2.9%
Condo/Cottage/Vacation Home	91,870	95,946	4.4%	146,370	151,830	3.7%
RV Park/Campground	79,660	78,157	-1.9%	145,350	127,330	-12.4%
<b>Total</b>	<b>376,912</b>	<b>380,961</b>	<b>1.1%</b>	<b>636,670</b>	<b>634,030</b>	<b>-0.4%</b>





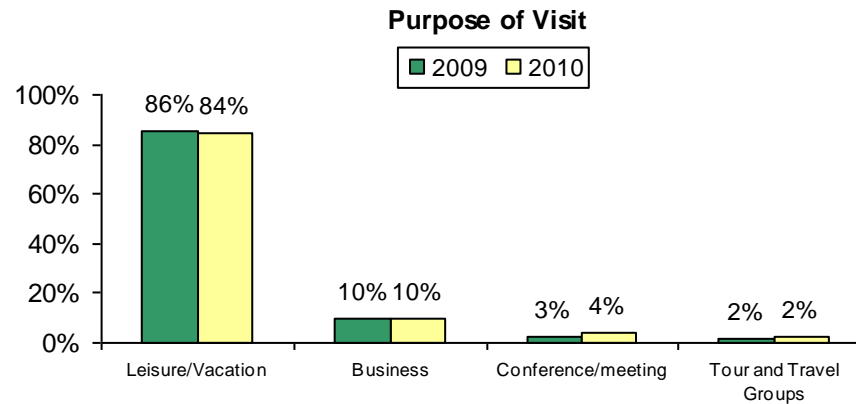
## Lodging Management Estimates

April Guest Profile		
	2009	2010
Property Managers Responding	144	125
<b>Purpose of Visit</b>		
Leisure/Vacation	86%	84%
Business	10%	10%
Conference/meeting	3%	4%
Tour and Travel Groups	2%	2%
Property Managers Responding	153	139
Average guests per room	2.5	2.7
Property Managers Responding	150	136
Average length of stay in nights	6.4	5.9

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

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

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

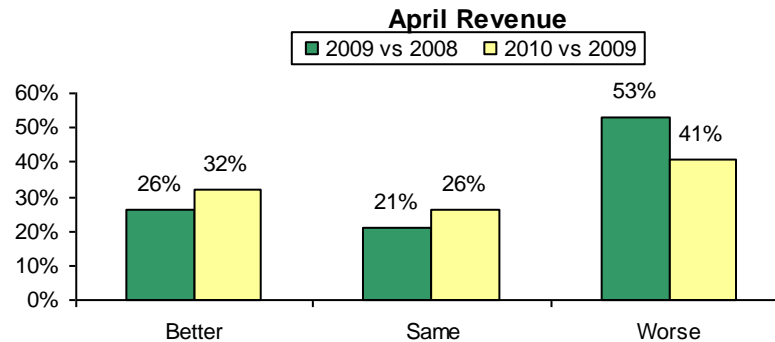
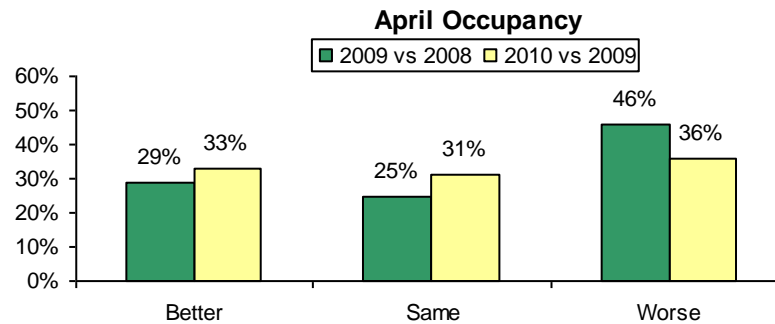




## Occupancy Barometer

	April Occupancy		April Revenue	
	2009	2010	2009	2010
Property Managers Responding	148	139	141	136
Better than prior year	29%	33%	26%	32%
Same as prior year	25%	31%	21%	26%
Worse than prior year	46%	36%	<53%>	41%

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

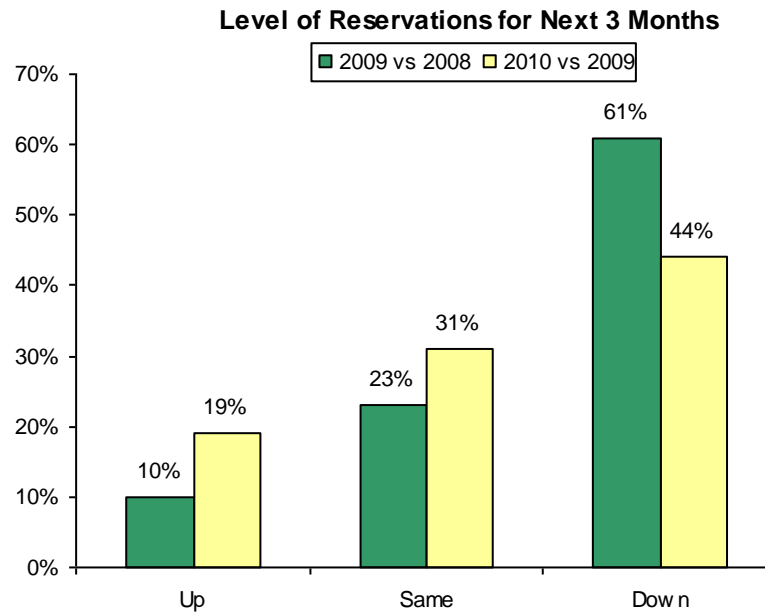




## Occupancy Barometer

Level of Reservations for next 3 months Compared to Last Year		
	2009	2010
Total Answering Respondents	145	134
Up	10%	<19%>
Same	23%	31%
Down	<61%>	44%
N/A	7%	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?



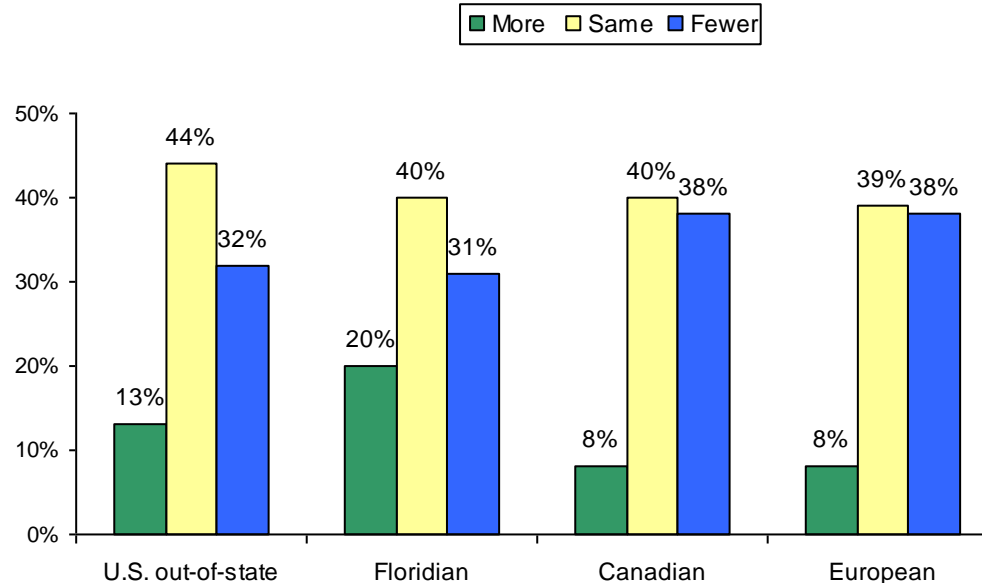


## Occupancy Barometer

Origin of Guests for Next 3 Months Compared to Last Year								
Property Managers Responding (133/120 Minimum)	More		Same		Fewer		Not Applicable	
	2009	2010	2009	2010	2009	2010	2009	2010
U.S out-of-state	11%	13%	36%	44%	<45%>	32%	9%	10%
Floridian	27%	20%	33%	40%	32%	31%	9%	10%
Canadian	11%	8%	36%	40%	42%	38%	11%	14%
European	16%	8%	31%	39%	41%	38%	12%	16%

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  
April 2010



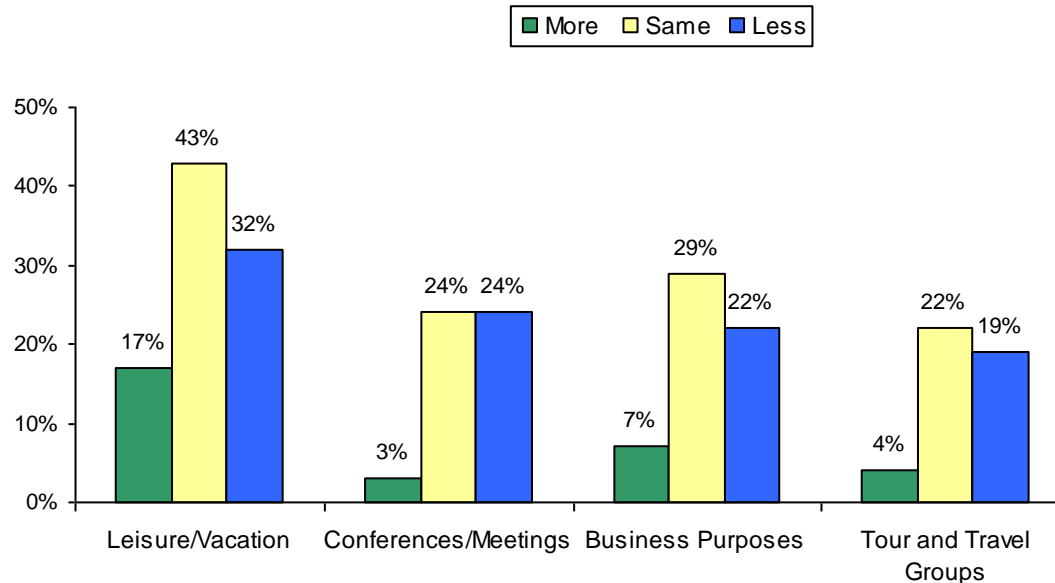


## Occupancy Barometer

Type of Travelers for Next 3 Months Compared to Last Year								
Property Managers Responding (123/114 Minimum)	More		Same		Less		Not Applicable	
	2009	2010	2009	2010	2009	2010	2009	2010
Leisure/Vacation	14%	17%	42%	43%	34%	32%	10%	8%
Conferences/Meetings	--	3%	19%	24%	33%	24%	48%	49%
Business Purposes	2%	<7%>	23%	29%	30%	22%	45%	41%
Tour and Travel Groups	3%	4%	20%	22%	28%	19%	49%	55%

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)?

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







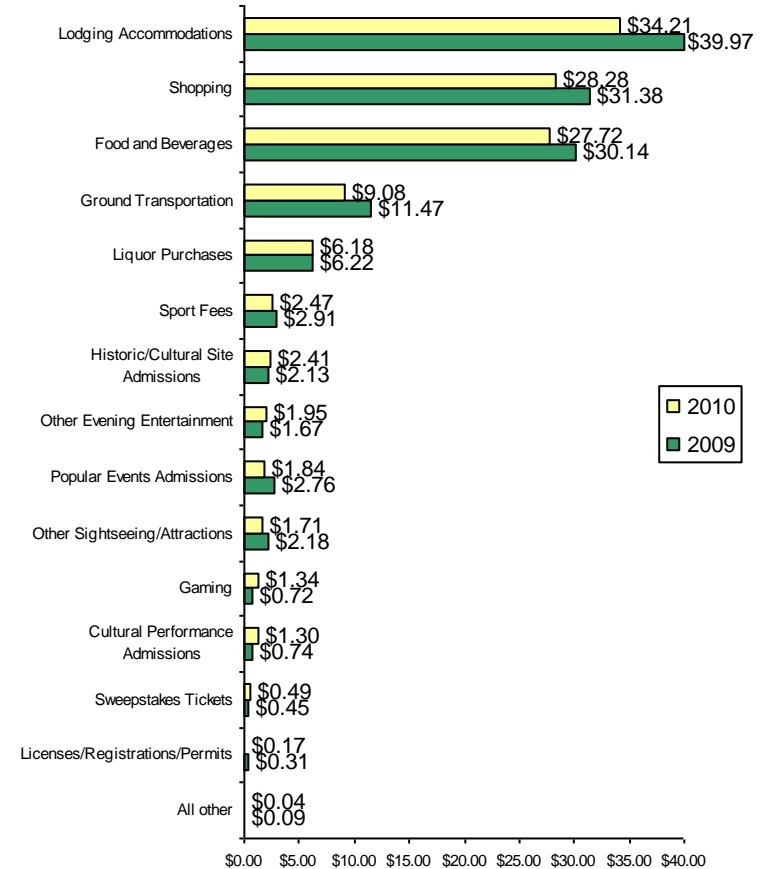
## Economic Impact Analysis April 2010



## Average Expenditures

April Average Expenditures per Person per Day			
	2009	2010	% Change
<b>TOTAL</b>	<b>\$133.16</b>	<b>\$119.19</b>	<b>-10.5%</b>
Lodging Accommodations	\$39.97	\$34.21	-14.4%
Shopping	\$31.38	\$28.28	-9.9%
Food and Beverages	\$30.14	\$27.72	-8.0%
Ground Transportation	\$11.47	\$9.08	-20.8%
Liquor Purchases	\$6.22	\$6.18	-0.6%
Sport Fees	\$2.91	\$2.47	-15.1%
Historic/Cultural Site Admissions	\$2.13	\$2.41	13.1%
Other Evening Entertainment	\$1.67	\$1.95	16.8%
Popular Events Admissions	\$2.76	\$1.84	-33.3%
Other Sightseeing/Attractions	\$2.18	\$1.71	-21.6%
Gaming	\$0.72	\$1.34	86.1%
Cultural Performance Admissions	\$0.74	\$1.30	75.7%
Sweepstakes Tickets	\$0.45	\$0.49	8.9%
Licenses/Registrations/Permits	\$0.31	\$0.17	-45.2%
All other	\$0.09	\$0.04	-55.6%

Average Expenditures per Person per Day

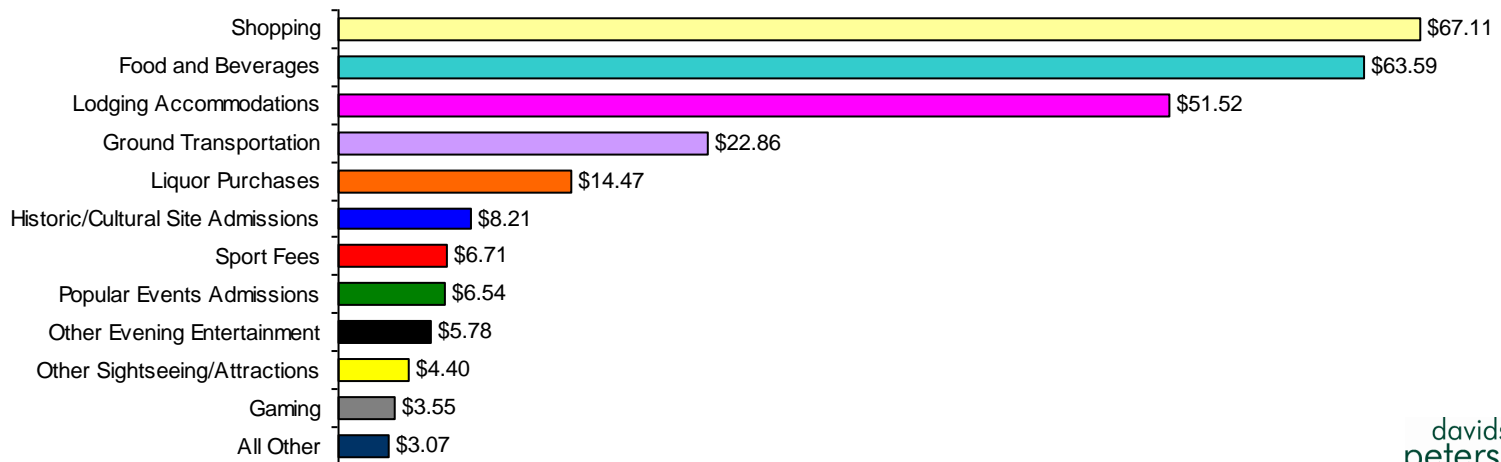




## Total Visitor Expenditures by Spending Category

APRIL TOTAL EXPENDITURES			
	2009	2010	% Change
<b>TOTAL</b>	<b>\$270,752,873</b>	<b>\$257,804,660</b>	<b>-4.8%</b>
Shopping	\$70,399,675	\$67,107,821	-4.7%
Food and Beverages	\$71,934,950	\$63,591,129	-11.6%
Lodging Accommodations	\$53,582,631	\$51,519,945	-3.8%
Ground Transportation	\$24,424,244	\$22,861,220	-6.4%
Liquor Purchases	\$15,211,318	\$14,468,411	-4.9%
Historic/Cultural Site Admissions	\$7,129,217	\$8,209,674	15.2%
Sport Fees	\$5,411,981	\$6,708,348	24.0%
Popular Events Admissions	\$7,057,283	\$6,543,880	-7.3%
Other Evening Entertainment	\$4,398,608	\$5,780,350	31.4%
Other Sightseeing/Attractions	\$4,675,092	\$4,395,950	-6.0%
Gaming	\$2,309,491	\$3,546,654	53.6%
All Other	\$4,218,383	\$3,071,278	-27.2%

April 2010 Total Expenditures  
(Millions)





## Total Visitor Expenditures by Spending Category

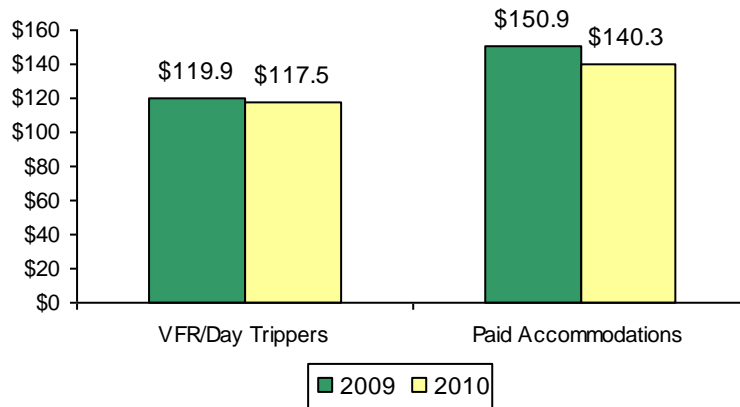
ALL PROPERTIES						
	Staying in Paid Accommodations			Visiting Friends and Relatives/ Day Trippers		
	2009	2010	% Change	2009	2010	% Change
<b>TOTAL</b>	<b>\$150,883,273</b>	<b>\$140,311,336</b>	<b>-7.0%</b>	<b>\$119,869,600</b>	<b>\$117,493,324</b>	<b>-2.0%</b>
Lodging Accommodations	\$53,582,631	\$51,519,945	-3.8%	\$0	\$0	--
Shopping	\$34,382,749	\$29,708,527	-13.6%	\$36,016,926	\$37,399,294	3.8%
Food and Beverages	\$30,517,766	\$28,825,590	-5.5%	\$41,417,184	\$34,765,539	-16.1%
Ground Transportation	\$12,159,418	\$9,833,092	-19.1%	\$12,264,826	\$13,028,128	6.2%
Liquor Purchases	\$6,264,000	\$6,210,533	-0.9%	\$8,947,318	\$8,257,878	-7.7%
Sport Fees	\$2,697,168	\$2,764,988	2.5%	\$2,714,813	\$3,943,360	45.3%
Historic/Cultural Site Admissions	\$2,156,548	\$2,540,760	17.8%	\$4,972,669	\$5,668,914	14.0%
Popular Events Admissions	\$2,916,883	\$2,169,782	-25.6%	\$4,140,400	\$4,374,098	5.6%
Other Sightseeing/Attractions	\$2,127,900	\$2,081,035	-2.2%	\$2,547,192	\$2,314,915	-9.1%
Other Evening Entertainment	\$1,558,904	\$1,775,259	13.9%	\$2,839,704	\$4,005,091	41.0%
Gaming	\$973,843	\$1,305,806	34.1%	\$1,335,648	\$2,240,848	67.8%
All Other	\$1,545,463	\$1,576,019	2.0%	\$2,672,920	\$1,495,259	-44.1%



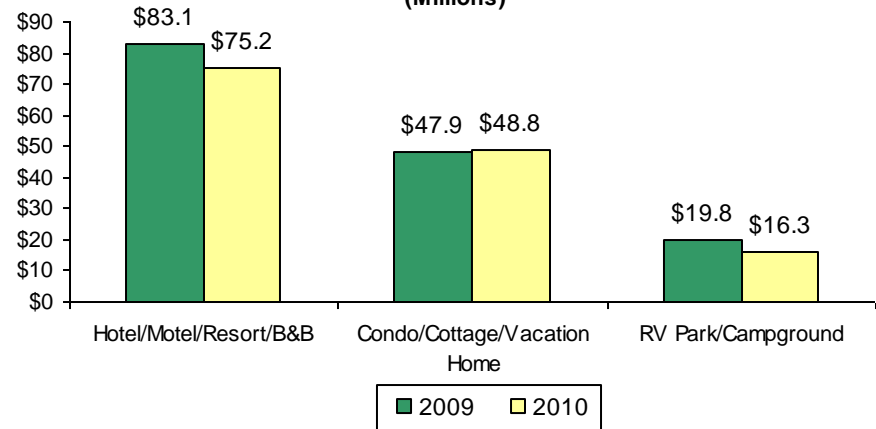
## Total Visitor Expenditures by Lodging Type

April Total Expenditures by Lodging Type					
	2009	2010	% Change	2009	2010
<b>TOTAL</b>	<b>\$270,752,873</b>	<b>\$257,804,660</b>	<b>-4.8%</b>	<b>100%</b>	<b>100%</b>
Visiting Friends & Relatives/Day Trippers	\$119,869,600	\$117,493,324	-2.0%	44%	46%
<b>Paid Accommodations</b>	<b>\$150,883,273</b>	<b>\$140,311,336</b>	<b>-7.0%</b>	<b>56%</b>	<b>54%</b>
<i>Hotel/Motel/Resort/B&amp;B</i>	\$83,133,559	\$75,171,837	-9.6%	31%	29%
<i>Condo/Cottage/Vacation Home</i>	\$47,931,435	\$48,793,870	1.8%	18%	19%
<i>RV Park/Campground</i>	\$19,818,279	\$16,345,629	-17.5%	7%	6%

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.



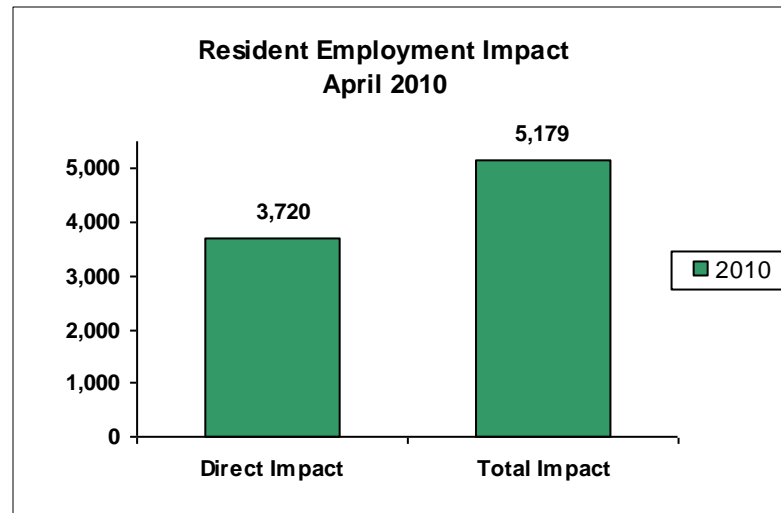
## Impact on Jobs for Lee County Residents

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.).





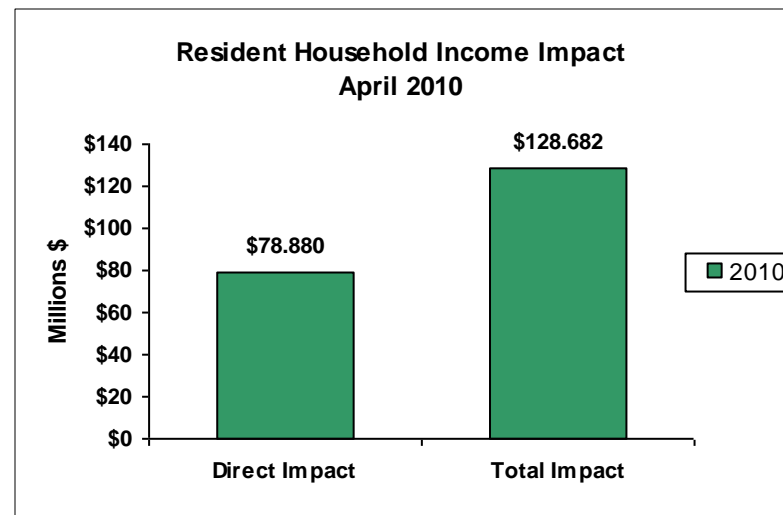
## Impact on Household Income for Lee County Residents

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.

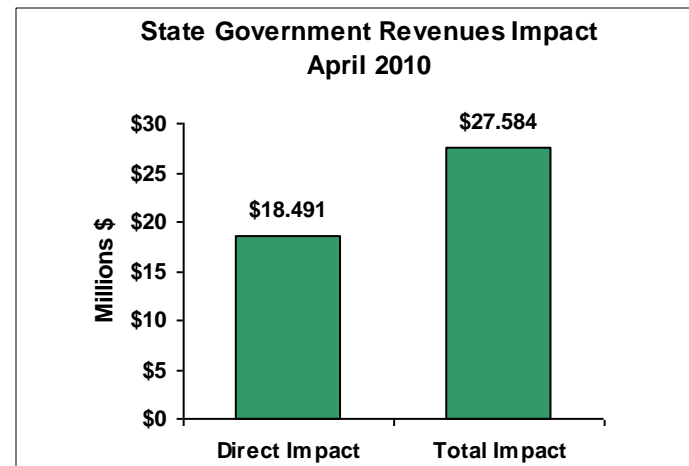
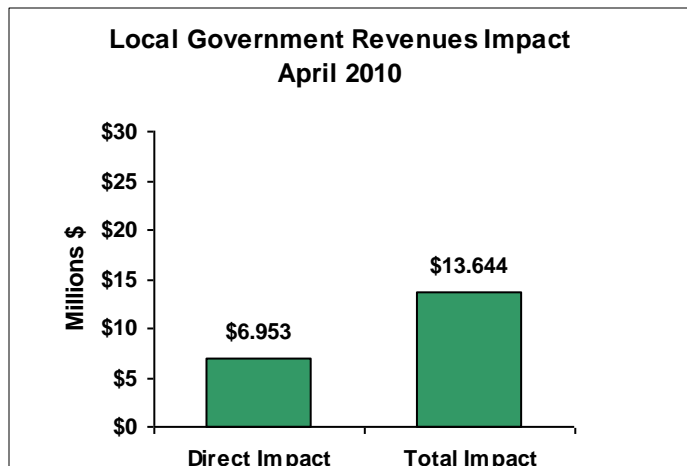
The gross government revenues accruing to governments as a result of producing the output purchased with visitor expenditures is the government revenue impact.

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 April 2010



## April 2010 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews*
Fort Myers Beach	Times Square	3-Apr	25
Fort Myers Beach	Estero Beach Club	3-Apr	7
Bonita Springs	Bonita Beach	7-Apr	25
Fort Myers Beach	Red Coconut RV	7-Apr	10
Sanibel	Casa Ybel Resort	9-Apr	9
Sanibel	Island Beach Club	9-Apr	7
Sanibel	Lighthouse Beach	9-Apr	18
Ft. Myers	Edison Estates	12-Apr	17
North Fort Myers	Shell Factory	15-Apr	12
North Fort Myers	Best Western	15-Apr	9
FMB	Windward	17-Apr	5
FMB	Pink Shell Resort	17-Apr	10
Cape Coral	Cape Coral Yacht Club	17-Apr	10
Sanibel	Pointe Santo	23-Apr	11
Sanibel	Ding Darling Sanctuary	23-Apr	11
Ft. Myers	Edison Estates	27-Apr	11
Ft. Myers	Centennial Park	27-Apr	7
<b>TOTAL</b>			<b>204</b>



## Occupancy Interviewing Statistics

Interviews were conducted from May 1 – May 15, 2010. Information was provided by 152 Lee County lodging properties.

Lodging Type	Number of Interviews
Hotel/Motel/Resort/B&Bs	89
Condo/Cottage/Vacation Home/Timeshare	43
RV Park/Campground	20
<b>Total</b>	<b>152</b>