

15. **COUNCIL MEMBERS' REPORT**

- a. Report of the Friday, January 14, 2011 Tourism Development Council (TDC) (Mayor Ruane)

AGENDA

January 14, 2011

- I. **Call to Order**
- II. **Roll Call**
- III. **Approval of December 10, 2010 TDC Meeting Minutes**
- IV. **Public to be Heard**
- V. **Municipalities to be Heard**
- VI. **Report of the Executive Director, Tamara Pigott**
 - a. **Tourist Tax Report**
 - b. **Smith Travel Report (STR Report)**
 - c. **RSW Passenger Activity Report**
 - d. **Administration Activity Report**
 - e. **Sales Report, Pamela Johnson**
 - f. **Communications Report, Nancy Hamilton**
 - g. **Visitor Services Report**
 - h. **New Product Development Report**
 - i. **Advertising Report, Victoria Simmons, BVK**
 - j. **Research Report, Marcia Wood, DPA**
- VII. **Report of the Sports Authority Executive Director, Jeff Mielke**
- VIII. **Report of the Economic Development Office, Jennifer Berg**
- IX. **Old Business**
- X. **New Business**
 - ⇒ a. **1st Quarter FY 2010-11 Budget Report**
 - b. **Tourism Development Projection**
- XI. **For Council's Information**
- XII. **TDC Member Items**
- XIII. **Adjourn**

**The next TDC Meeting will be held 9:00 a.m. on Friday, February 11, 2011
at the Visitor & Convention Bureau, 12800 University Drive, Suite 325.**

⇒ Denotes Action Item

MEMORANDUM

TO: Tourist Development Council Members

FROM: Tamara Pigott, Executive Director

DATE: January 14, 2011

RE: REPORT FROM THE EXECUTIVE DIRECTOR

- a) Preliminary Tourist Tax Report: Resort Tax Collection for November 2010 was \$1,114,751. This reflects a 2.4% decrease over final Nov. 2009 collections (\$1,142,713), but a 17.8% increase over the preliminary Nov. 2009 collections (\$946,326).
- b) STR Report
- c) RSW Passenger Report
- d) Administration Report

RSW PASSENGER COMPARISON REPORT- ENPLANED & DEPLANED

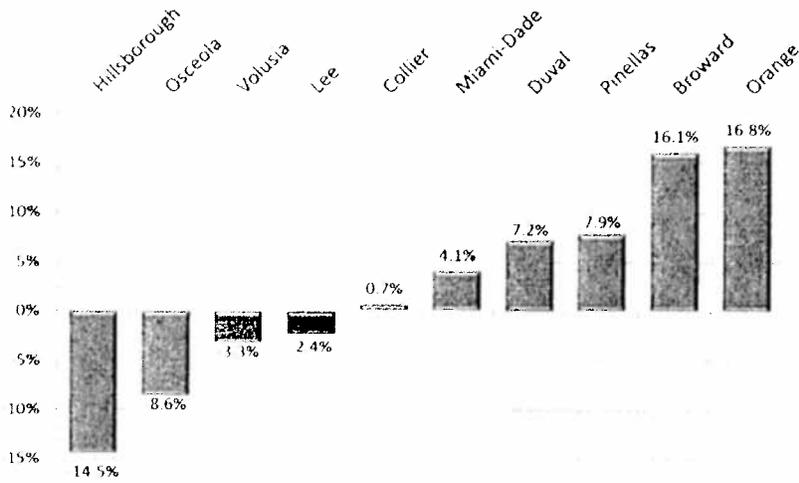
MONTH	2009	2010	%CHANGE
November	598,478	652,783	9.1%

Note: For further information regarding airport statistics: vbmorland@flylcpa.com



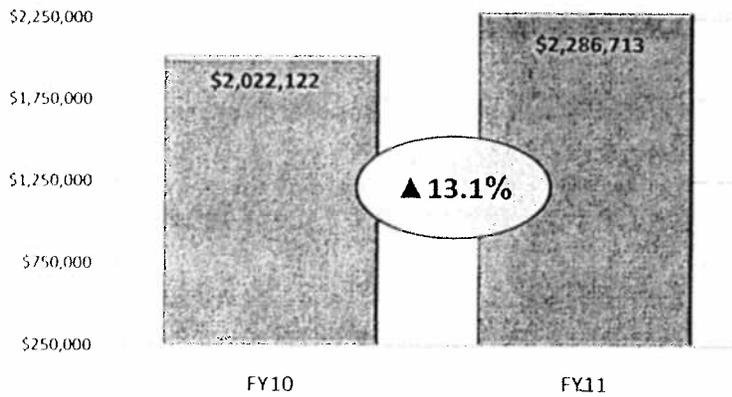
Tourist Tax – Percentage Change

% Change – November 2010 v. November 2009



Preliminary Tourist Tax Collections

Year-to-Date FY11 v Year-to-Date FY10



Tax collection thru 12/31

STR Report

% Change – November 2010 v. November 2009

Occupancy

▲ 8.5%

Room Revenue

▲ 4.8%

ADR

▼ 4.2%

Available Room Nights

▲ 0.9%

RevPAR

▲ 3.9%

Rooms Sold

▲ 9.4%

▲ 4.1% of
FORT MYERS



SANIBEL

Preliminary Tourist Tax Collections YTD

12/31/2009		12/31/2010		
CURRENT PAYMENTS		CURRENT PAYMENTS		% CHANGE
PRIOR Yrs	2,302	PRIOR Yrs	308	
Oct-09	721,026	Oct-10	769,527	
Nov-09	601,477	Nov-10	1,096,933	
Dec-09	28,621	Dec-10	40,464	
Mar-10	16,388	Mar-11	13,916	
Sep-10	24	Sep-11		
FUTURE Yrs	155	FUTURE Yrs		
Sub Total:	1,369,993	Sub Total:	1,921,147	40.2%
LATE PAYMENTS		LATE PAYMENTS		% CHANGE
PRIOR Yrs	149,330	PRIOR Yrs	205,648	
Oct-09	157,950	Oct-10	142,100	
Nov-09	344,849	Nov-10	17,818	
Sub Total:	652,129	Sub Total:	365,566	-43.9%
Total:	2,022,122	Total:	2,286,713	13.1%

Preliminary Nov 2009 v Nov 2010

12/31/2009		12/31/2010		
Nov-09		Nov-10		% CHANGE
Current	601,477	Current	1,096,933	
Late	344,849	Late	17,818	
Total:	946,326	Total:	1,114,751	17.8%

Final Nov 2009 v Preliminary Nov 2010

9/30/2010		12/31/2010		
Nov-09		Nov-10		% CHANGE
Current	617,018	Current	1,096,933	
Late	525,695	Late	17,818	
Total:	1,142,713	Total:	1,114,751	-2.4%

LEE COUNTY TOURIST TAX COLLECTIONS BY FISCAL YEAR

CURRENT PAYMENTS PERIOD	FINAL		FINAL		FINAL		FINAL		PRELIMINARY	
	FY06/07	YTD	FY07/08	YTD	FY08/09	YTD	FY09/10	YTD	FY10/11	YTD
Prior Years										
OCTOBER	914,037	914,037	984,607	984,607	579,768	579,768	721,181	721,181	308	308
NOVEMBER	1,233,354	2,147,391	1,224,479	2,209,086	962,052	1,541,820	617,018	1,338,199	769,527	769,527
DECEMBER	1,480,483	3,627,874	1,586,167	3,795,253	1,038,517	2,580,337	1,389,073	2,727,272	1,096,933	1,866,460
JANUARY	2,245,034	5,872,908	2,293,638	6,088,891	1,665,144	4,245,481	1,356,344	4,083,616	40,463	1,906,923
FEBRUARY	2,940,762	8,813,670	3,095,932	9,184,823	1,764,392	6,009,873	2,179,931	6,263,547		1,906,923
MARCH	4,730,560	13,544,230	4,944,241	14,129,064	2,985,171	8,995,044	4,005,514	10,269,061	13,916	1,920,839
APRIL	2,281,426	15,825,656	2,164,414	16,293,478	2,055,451	11,050,495	1,441,418	11,710,479		1,920,839
MAY	1,365,742	17,191,398	1,492,226	17,785,704	1,224,342	12,274,837	901,899	12,612,378		1,920,839
JUNE	1,522,985	18,714,383	1,521,858	19,307,562	803,167	13,078,004	1,288,003	13,900,381		1,920,839
JULY	1,474,314	20,188,697	1,445,387	20,752,949	1,133,837	14,211,841	1,183,700	15,084,081		1,920,839
AUGUST	1,045,591	21,234,288	1,068,403	21,821,352	680,758	14,892,599	771,892	15,855,973		1,920,839
SEPTEMBER	835,376	22,069,664	749,443	22,570,795	770,433	15,663,032	768,806	16,624,779		1,920,839
(-) REFUNDS	5,425	22,075,089	11,665	22,582,460		15,663,032		16,624,779		1,920,839
FUTURE YEARS	(15,337)	22,059,752	(23,510)	22,558,950	(2,496)	15,660,536	7,885	16,616,894		1,920,839
SUB TOTAL	\$ 22,059,752		\$ 22,558,950		\$ 15,660,536		\$ 16,635,645		\$ 1,921,147	

LATE PAYMENTS										
PERIOD	FY 06/07		FY07/08		FY08/09		FY09/10		FY10/11	
		YTD		YTD		YTD		YTD		YTD
Prior Years	309,797	309,797	439,360	439,360	499,599	499,599	774,433	774,433	205,648	109,390
OCTOBER	21,416	331,213	21,137	460,497	340,306	839,905	177,859	952,292	142,100	251,490
NOVEMBER	33,603	364,816	24,849	485,346	220,310	1,060,215	525,695	1,477,987	17,818	262,151
DECEMBER	63,854	428,670	37,412	522,758	598,648	1,658,863	324,434	1,802,421		
JANUARY	87,173	515,843	54,592	577,350	599,602	2,258,465	809,806	2,612,227		
FEBRUARY	131,298	647,141	62,036	639,386	1,012,237	3,270,702	583,538	3,195,765		
MARCH	216,680	863,821	305,956	945,342	1,660,672	4,931,374	1,238,974	4,434,739		
APRIL	72,280	936,101	30,471	975,813	73,265	5,004,639	750,255	5,184,994		
MAY	37,720	973,821	17,928	993,741	33,300	5,037,939	407,083	5,592,077		
JUNE	42,198	1,016,019	10,629	1,004,370	600,284	5,638,223	110,245	5,702,322		
JULY	19,795	1,035,814	25,730	1,030,100	266,295	5,904,518	236,520	5,938,842		
AUGUST	39,174	1,074,988	14,210	1,044,310	260,030	6,164,548	131,463	6,070,305		
SEPTEMBER	0	1,074,988		1,044,310	39,113	6,203,661	58,320	6,128,625		
SUB TOTAL	\$ 1,074,988		\$ 1,044,310		\$ 6,203,661		\$ 6,128,625		\$ 365,566	

GRAND TOTAL	\$ 23,134,740	\$ 23,603,260	\$ 21,864,197	\$ 22,764,270	\$ 2,286,713
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CURRENT PAYMENTS: Payments received from the 1st day through the closing date & posted to either the current period or to future periods. Current payments received after the 20th of the month may include penalty and
LATE PAYMENTS: Cumulative payments for prior months & years. Late payments include tax and may include penalty & interest charges.

TAXES INCREASE FROM 3% TO 5% AS OF JANUARY 2006

*For further information, please contact:

Tamara Pigott, Executive Director at tpigott@leegov.com or Fran Belasco, Office Manager at fbelasco@leegov.com

Telephone: (239) 338-3500

**SOUTHWEST FLORIDA INTERNATIONAL AIRPORT
TRAFFIC REPORT**

	2006	YTD	2007	YTD	2008	YTD	2009	YTD	2010	YTD
JAN	725,195	725,195	783,207	783,207	762,316	762,316	732,851	732,851	731,739	731,739
FEB	774,929	1,500,124	841,727	1,624,934	845,741	1,608,057	809,990	1,542,841	755,095	1,486,834
MARCH	997,869	2,497,993	1,081,425	2,706,359	1,030,151	2,638,208	985,267	2,528,108	996,685	2,483,519
APRIL	847,758	3,345,751	924,919	3,631,278	834,689	3,472,897	849,815	3,377,923	813,329	3,296,848
MAY	574,963	3,920,714	603,870	4,235,148	576,143	4,049,040	524,520	3,902,443	552,105	3,848,953
JUNE	505,252	4,425,966	525,258	4,760,406	488,266	4,537,306	461,295	4,363,738	476,625	4,325,578
JULY	502,598	4,928,564	535,264	5,295,670	502,932	5,040,238	492,063	4,855,801	490,227	4,815,805
AUGUST	446,415	5,374,979	488,539	5,784,209	448,667	5,488,905	454,927	5,310,728	444,714	5,260,519
SEPT	368,245	5,743,224	387,452	6,171,661	328,278	5,817,183	359,743	5,670,471	374,590	5,635,109
OCT	513,426	6,256,650	537,606	6,709,267	492,258	6,309,441	470,931	6,141,402	532,025	6,167,134
NOV	660,658	6,917,308	651,495	7,360,762	603,366	6,912,807	598,478	6,739,880	652,783	6,819,917
DEC	725,909	7,643,217	689,000	8,049,762	691,038	7,603,845	676,078	7,415,958		
TOTALS	7,643,217		8,049,762		7,603,845		7,415,958			44,871,955

Note: For further information regarding airport statistics: vbmorland@flylcpa.com

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Lee County Visitor & Convention Bureau

LEE COUNTY VISITOR & CONVENTION BUREAU

Administrative Activity Report

DECEMBER 2010

DECEMBER 1-2, 2010

- Florida Beaches Habitat Conservation Plan Steering Committee Meeting

DECEMBER 3, 2010

- Interview with Halley Hines, WINK-TV

DECEMBER 6, 2010

- Meeting with Karen Hawes
- Meeting with Commissioner Frank Mann
- Meeting with Nancy Hamilton

DECEMBER 7, 2010

- Meeting with Nancy Hamilton, Pamela Johnson, Woody Peek, Erick Garnica and Charm Evans
- MPI Luncheon
- Conference call with Marcia Wood & Kevin Knight, DPA, and Nancy Hamilton

DECEMBER 8, 2010

- Meeting with Jeff Mielke
- County Manager staff meeting
- Conference call with Mary DeLong, Victoria Simmons, Kevin Kriehn, Nicholas Gagliano, Fred Ziegler, & Annie Ecken, BVK and Woody Peek

DECEMBER 9, 2010

- News-Press' Third Annual Economy Panel
- Meeting with Kathy Rooker, CEPD, Nan Rodriguez, Commissioner Manning's office, and Karen Hawes
- Meeting with Rick Hayduk and Shawn Farrell, South Seas Island Resort

DECEMBER 10, 2010

- TDC Meeting

DECEMBER 13, 2010

- Meeting with Judie Zimomra, City of Sanibel, & Birgit Vertesch, Ding Darling Wildlife Society
- SWFL Attractions Association Meeting

DECEMBER 14, 2010

- Meeting with Chuck & Diandra Taylor
- Meeting with Colleen DePasquale
- Conference call with Mary DeLong, Victoria Simmons, Kevin Kriehn, Nicholas Gagliano, Fred Ziegler, & Annie Ecken, BVK, and Aaron Babbie, Spark Loft Media
- Meeting with Commissioner Tammy Hall and Karen Hawes

DECEMBER 15, 2010

- Lee County Port Authority Employee Appreciation Luncheon
- Meeting with Nancy Hamilton and Lee Rose

DECEMBER 16, 2010

- Meeting with Dr. Markus Sherry, Art of the Olympians
- Meeting with Betsy Clayton, Lee County Parks & Recreation
- Conference call with Mary DeLong, Victoria Simmons, Kevin Kriehn, Nicholas Gagliano, Fred Ziegler, Annie Ecken, Connie Casdia, & Ross Lowinske, BVK, and Woody Peek
- Meeting with Shelley Crant, Florida Travel Marketing
- Meeting with Woody Peek

DECEMBER 17, 2010

- Conference call with Mary DeLong & Jackie MacKay, BVK
- Meeting with Woody Peek

DECEMBER 20, 2010

- Meeting with Mei-Mei Chan, News-Press
- Meeting with Kate Gooderham, Gooderham & Associates
- Conference call with Victoria Simmons, Annie Ecken, Kevin Kriehn, Ross Lowinske & Mark Markussen, BVK, and Woody Peek
- Meeting with Judie Zimomra, City of Sanibel, Kristie Anders, Sanibel-Captiva Conservation Foundation, Kathleen Hoover, Bailey Matthews Shell Museum, Steve Greenstein, Clinic for the Rehabilitation of Wildlife (CROW), and Nancy MacPhee

For additional information: Fran Belasco at 239-338-3500 or fbelasco@leegov.com

SALES REPORT

_____ Sales Calls / Tvl Agents	_____ Consumer	_____ International
_____ Meeting Planners	_____ XX Tour Operator	_____ RV / Motor Coach
_____ FAMs / Site Inspection	_____ SMERF	_____ Education/Seminars

Name of Event: **United States Tour Operators Association (USTOA)**
Dates of Event: **December 10 - 20, 2010**
Event Location (City & State): **New Orleans, LA**
VCB Representative at Event: **Woody Peek & Pamela Johnson**

Show Attendance Estimate: 800 Total Appointments Held: 12
Would You Recommend Next Year: Yes Additional Lee County Properties Attending: N/A

Objective

- The United States Tour Operators Association (USTOA) is a professional association representing the tour operator industry. They are comprised of companies whose tours and packages encompass the entire globe and who conduct business in the United States.
- Our objective was to meet with buyers of travel for Florida and see if there is an opportunity to increase leisure group tour business to our destination.

Leads / Prospects

- Travel Bound
- GoGo Worldwide Vacations
- Tauk Tours
- Globus
- Travel Impressions
- Mark Travel
- Majestic Vacations

Comments

- From meeting with the buyers at this conference, the consensus was that it is difficult for tour operators to sell Florida; they believe it is a known product for the domestic market and nothing more than an airline ticket and hotel. Tour operators need to offer unique vacation packages that the consumer can only get through them.
- The USTOA Annual Conference & Marketplace is open only to delegates from Supplier Member companies of the United States Tour Operators Association. All activities, both social and professional, are planned to give Supplier Members plenty of opportunities to meet and network with some of the most respected domestic tour operators.
- Henry Hardeveldt, VP Forrester Research, gave a workshop on Travel Trends for 2010-11.
- Lots of interest for outbound travel from the US to Europe, Asia and Latin America. Not too much interest in Florida destinations.
- This event will be held at the Marco Island Marriott in December 2011. This will be an opportunity to get some of the influential buyers to this destination.

Trends

- Devices are evolving – it's time to rethink mobile
- Take steps to make your digital channels as flexible and comprehensive as your offline channels
- Social media may have been created for younger consumers, but everyone now uses
- Younger travelers tend to use online intermediaries, older travelers tend to book directly with suppliers

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SALES REPORT

<input type="checkbox"/> Sales Calls / Tvl Agents	<input type="checkbox"/> Consumer	<input type="checkbox"/> International
<input checked="" type="checkbox"/> Meeting Planners	<input type="checkbox"/> Tour Operator	<input type="checkbox"/> RV / Motor Coach
<input type="checkbox"/> FAMs / Site Inspection	<input type="checkbox"/> SMERF	<input type="checkbox"/> Education/Seminars

Name of Event: **EduCon 2010**
 Dates of Event: **December 1-2, 2010**
 Event Location (City & State): **St. Louis, MO**
 VCB Representative at Event: **Jerry Terp**

Show Attendance Estimate: 175 Amount of Visitor Guides Distributed: _____
 Would You Recommend Next Year: Yes
 Additional Lee County Properties Attending: N/A

Objective

- To Market & increase awareness to St. Louis area Meeting Planners that Lee County is a viable meeting destination and to produce future group business leads and definite group bookings.
- To show support for the St. Louis MPI chapter and build relationships.
- Presentation/Lunch to HelmsBriscoe Rep Kim Kossl

Leads / Prospects

- Meetings & Events – Nancy Herron, CMP Meeting Planner (3rd Party Planner) I will be in touch for future meetings
- Experient: Cara Beckerle, CMP & Michael Gray (3rd Party Planner) I will be in touch for future meetings
- Met with wife of Jeff Berger (Conference Planning Resources-working with him on Amway Group) Jeff did not attend, but his wife will let him know we spoke.
- Family Farms: Abbey Sabo - Event & Travel Planner. I will be working with her on January 2012 Meeting (125pk/515+ room nights) This group works with HelmsBriscoe and a lead will be forthcoming from Cvent.
- American Optometric Student Assn: Marlene Burle, CMP Will follow up to find out about possible future business
- Schaeffer Manufacturing Company: Jeanne Prokopf-Manager, Sales Administration- Will follow up to find out about possible future business

Comments

- This was a good mix of planner to suppliers. This seems to be a good chapter. I would recommend sponsorship and attending again next year.
- Next year I will be co-sponsoring a lunch & dinner for Meeting Planners in the area. I will partner with "Travel Alberta" It will be good for clients to have the opportunity to come to a choice of two events/presentations from two completely destinations. This will also be more cost effective.
- Also note that ASAE will be in St. Louis in August 2011
- The education seminars were done very well. Actually some of the same speakers that MN/WI Midwest Regional Meeting used in November 2010.

Trends

- Effective communication
- Building client relations again
- Effective selling

SALES REPORT

_____ Sales Calls / Tvl Agents	_____ Consumer	_____ International
<u> x </u> Meeting Planners	_____ Tour Operator	_____ RV / Motor Coach
_____ FAMs / Site Inspection	_____ SMERF	_____ Education/Seminars

Name of Event: **TSAE, SGMP & sales calls**
 Dates of Event: **Dec. 14-15, 2010**
 Event Location (City & State): **Tallahassee, FL**
 VCB Representative at Event: **Kimball Mathews**

Show Attendance Estimate: 100/150 Amount of Visitor Guides Distributed: _____
 Would You Recommend Next Year: Yes
 Additional Lee County Properties Attending: _____

Objective

- Increase & continue to raise awareness for our destination.
- Generate leads that will result in more business for Lee County.

Leads / Prospects

- **Florida Retail Federation**, Oct. 2011 or 2012 (had their 2010 @ Hyatt Grand Cypress/Orlando) and gave her the Islands Incentive & emailed the Hyatt's 10 year incentives to help in getting the meeting down here. 12,000 sq.ft of meeting space with exhibits in one room.
- **Florida Dept. of Education/Division of Vocational Rehabilitation**, Training sessions all during the year; gave packet with all the smaller properties included.
- **Florida Dept. of Elder Affairs**, met with Sarah Davis (ZsaZsa had to leave unexpectedly) and dropped off holiday ornaments. SHINE Leadership Training Program coming in spring 2011.

Comments

- SGMP Charity Drive for the Homeless Shelter in Leon County: "Thank you for your generous contribution to the SGMP FL Capital Chapter Charity Drive in December, 2010! The 3 large boxes of items that you delivered were very much needed and appreciated. Thank you and Lee County for the large contribution!!!"
- TSAE Power Luncheon featured the Florida A & M University Choral Group who were unable to go home for the holidays. Their performance received a standing ovation...more than one time! In addition, TSAE had their 'Elder Elf' drive, which helps hundreds of frail, homebound seniors during the Holiday Season. I visited their office and dropped off items of use and our holiday ornaments.
- Florida Society of Association Executives (FSAE): delivered the VCB holiday ornament & they were THRILLED!!! They still had the starfish from last year! Teri Carden immediately took a photo & posted it on FB.
- Have requested a meeting with Sherry Whitney (FL Retail Federation) for Jan. 18, 2011 in Tallahassee to discuss Oct 2011/12 annual meeting for the Hyatt Coconut Point Resort & Spa (with Darin).

Trends

- Even though the economy is supposedly getting better, be prepared...it's a long way up.

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SALES REPORT

<input type="checkbox"/> Sales Calls / Tvl Agents	<input type="checkbox"/> Consumer	<input type="checkbox"/> International
<input checked="" type="checkbox"/> Meeting Planners	<input type="checkbox"/> Tour Operator	<input type="checkbox"/> RV / Motor Coach
<input type="checkbox"/> FAMs / Site Inspection	<input type="checkbox"/> SMERF	<input type="checkbox"/> Education/Seminars

Name of Event: **2010 Holiday Showcase**
 Dates of Event: **December 14, 2010**
 Event Location (City & State): **Chicago, IL**
 VCB Representative at Event: **Jerry Terp**

Show Attendance Estimate: 2500 (1300+ Mtg Planners)
 Amount of Visitor Guides Distributed: 10
 Would You Recommend Next Year: Yes
 Additional Lee County Properties Attending: N/A However, Lenne Goslin attended with Hyatt, Brett Lindsay attended with Marriott & Nalini Dube attended with Hilton

Objective

- To Market & increase awareness to planners that Lee County is a viable meeting destination and produce future group business leads and definite group bookings.
- To make planners aware that there is an "In Market Sales Person" in the Midwest.
-

Leads / Prospects

- SmithBucklin (Met at MPI Reception) Rhonda Grizzard-Associate, Convention & Tradeshow Services & Eric Johnson-Sr. Manager, Event Services
- American Student Dental Assn: (Met at MPI Recp) Meghan Keelean-Meeting Planner
- National Assn of Realtors (Met at Big Bar Recp) Keti Loncar-Meeting Planner & Katie Malito-Managing Director, Logistics (Conventions & Meetings)
- American Association of Endodontists: (Met at Big Bar Recp) James Drinan-Exec Director. He is looking to consider our destination for an October Future Meeting. 350 ppl. He is a huge Red Sox fan and may also use Hotel Ipdigo for a small group to attend spring training.
- Experient: Allison Versman-Manager, Strategic Development (Met at Big bar Recp)
- ConferenceDirect: Robert Deluca (Met at Big Bar Recp)
- Warehousing Education & Research Council: Ellen Pendola-Meeting Manager (I sat with her at the lunch) 2011 is an open year and I will be in touch for possibility of 2011 or future RFP
- Niversity of IL at Urbana-Champaign: Michelle Marquart-Program Associate. May 2014 is open year. 500 ppl. I will be in contact for more information. This is a group that books every other year.
- Senior Planners Industry Network: Tracey Smith, VP Programs. She will be sending me RPF this week. It will need some sponsorship from VCB etc. May or June 2011 250 ppl. This is a network of senior planners. They are looking to have their first meeting.
- American Bar Assn: Dawn Holiday-Forums Manager. Looking at 2013 for a BOD Mtg. She will send lead out if our destination is approved by her board.
- American Bar Assn: Teresa Ucok-Manager. Her group usually always uses East FL. She is trying to talk them in to considering West FL.
- HelmsBriscoe: Cheryl Faust-Manager, Global Accounts
- Experient: Jason Jordan-Regional Director. He oversees Midwest Regional managers.
- American Physician Institute: Michelle Bushe-Business Development Director. They do several CME programs. She wants more information sent to her on our destination.
- Meetings & Events USA: Daniel Morris, VP. (Third party planner)

- Association Management Center: Vanessa Mobley-Sr. Meetings Manager. I will be talking with her to set up lunch presentations for her team in Spring or Summer 20119 (Assn Mgmt Company)
- Emergency Nurses Assn: Terri Bruce-Foundation Coordinator. I will be in touch with the Meeting Director Helen Pollard for future meetings.
- Medical Travel LLC: Jack Eilrich-President. This group plans several CME programs. He wants me to send information and stay in touch.
- Weddings & Events: Kenneth Mau-Event Coordinator. They use our destination. I will pass information on to Jovina
- Medical Library Assn: Raymond Neagele-Director of Financial and Administrative Services. He oversees the Meetings Dept.
- American Society for Clinical Pathology: Catherine Sullivan-Director, Meeting Services. They use our destination. She wants more information and sales call next trip.
- Continuing Education Programs of America: Arthur Moreau-President. They do several educational programs. They want more information. FAM Invite as well for future.

Comments

- Holiday Showcase is presented by the Assn Forum of Chicagoland and is considered to be one of the top educational and networking opportunities available for association professionals. This event includes a large expo where attendees can increase their knowledge of technology and service providers. Nearly every service industry, meeting destination and hotel chain is represented that serves the Association community.
- There were less exhibitors than last year, however the traffic flow on the tradeshow floor was great
- The registration process for planners to attend was a mess this year. Several planners had to enter the tradeshow without having a card/badge. The registration line was way too long. I understand that the registration computers had server issues.
- All leads/prospects will be added to SimpleView. Letters/follow up will be completed in upcoming days.

Trends

- Social Media
- Greener meetings and events
- No Attrition requirements in contracts from planners. This still continues to be a big issue
- Corporate Social Responsibility seems to be a growing trend. It will be important to provide organizations opportunities and ideas.

Sales Calls - DC

- 12/8/10-Client Event – Co hosted client event with Palm Beach CVB (14 clients)

Monthly Meetings & Events

- 12/10/10- Attended PCMA Capital Chapter Board Meeting – DC Visitors Assn Offices
- 12/10/10- Attended DMAI Holiday Luncheon
- 12/13- Attended PMPI Member Recognition Holiday Lunch – PJ Clarks
- 12/14/10 Conference Call- PCMA Member Recognition Committee
- 12/15/10- CVB Reps Client Holiday Party- Ritz Carlton

Upcoming Events

- 1/5/10- PMPI Monthly luncheon - Four Seasons
- 1/5/10- AMC Institute Associate Committee Conference Call
- 1/8-1/13/11- PCMA Annual Meeting - Las Vegas
- 1/18/11- AMPS Monthly Meeting
- 1/26-1/29/11- Alliance for CME Meeting - San Francisco

MEETINGS & GROUPS REPORT

Midwest Office December 2010

Leads

- USS Renshaw – 2011 Reunion (35pk/ 105 total room nights)
Note: This is a lead as a result of the November 2010 Midwest FAM
- Quality 4 Less – 2011 Sales Meeting (38 peak/532 total room nights)
Note: This lead came in on 12/30 and is very last minute. Group is requesting 1/2/11 arrival for 2 wks.

Prospects

- University of WI – Ukraine Tour
- 4D-CRM – Independent Planner (Florida Encounter) Future Incentive Meetings
- Accenture – Christine Schubach-with Maxadvantage Meetings (Florida Encounter) Future Educational training programs.
- American Academy of Oral & Maxillofacial Pathology – Janet Svazas (Florida Encounter) Future Annual Meeting
- Stiletto – Gigi DeLuca (Florida Encounter) Future training meeting
- ITA Group – Rebecca Jones (Florida Encounter) Future Meeting / Tradeshow
- Nestle Purina Pet Care Company – Amy Powell (Florida Encounter) Future Sales meeting
- The Travel Concedrn – Karen Mason, Independent Planner (Florida Encounter) Future Sales Meeting for client
- Meetings Plus – Doris Mayer, Independent Planner (Florida Encounter) Annual meeting for client.
- Illinois Farm Bureau – 2012 Incentive Trip (150= room nights)
- Leasing Consultants Corp – 2012 Incentive Program (100 pk/450 total room nights)
- Lamarche Manufacturing Co., – 2011 Meeting for Reps (32+ room nts)
- American Bar Assn – 2012 Committee Mid Year Meeting (200 room nts)
- American Bar Assn – 2011 Annual Conference (210 pk/630 total room nts)
- American Bar Assn – 2011 Derivatives & Future Law Committee Meeting (120 pk/360 total room nts)
- American Bar Assn – 2012 Board Meeting (30 pk/120 room nts)
- American Bar Assn – 2012 Consumer Financial Services Committee Meeting (100+ Pk/400+ total room nts)
- Lincoln Plaza Auto Parts – 2012 Meeting (20 pk/40+ total room nts)
- American College of Healthcare Executives – 2013 Educational Program (40 pk/160+ total room nights)
- American Neuropsychiatric Assn – 2015 Annual Meeting (350 pk/1,400 total room nts)
- Interstate Postgraduate Medical Assn – 2014 or 2015 Conference (120 pk/360 ttl rm nts)
- Int'l Carwash Assn – 2012 BOD Meeting (15-20 pk/45 ttl rm nts)
- Illinois Automobile Dealers Assn. – 2012 Annual Conference (50/60 pk/150+ ttl rm nts)

- American Greetings Corp – 2012 Sales Incentive Trip (50 pk/125+ ttl rm nts)
- American Greetings Corp – 2011 Field Sales Mgmt Incentive Trip (25 pk/125+ ttl rm nts)
- Yeomans Chicago Corp – 2011 Incentive Program (150 pk/300 ttl rm nts)

Definite Business

- Cognis – 2010 Corp Meeting (428 rm nts picked up)

Sales Calls

- 12/1: Lunch Meeting in St. Louis, MO with Kim Kossl – HelmsBriscoe. She is working on the Interstate Safe Transit Assn – 2012 International Transport Packaging Forum. Lead is out for this group (215 pk/800 ttl rm nts)
- 12/28: Lunch Meeting – Minneapolis with Tracey Smith, VP, Programs – The Planner Network.

Monthly Activities

- 12/ 8: Meet Minneapolis Holiday Tradeshow
- 12/ 10: MSAE Holiday Lunch
- 12/13: MPI Chicago Holiday Event – Chicago
- 12/14: Holiday Showcase – Chicago
- 12/29: Twin Cities Based Reps Meeting (First meeting; will be held quarterly to network about working together on client events and other ideas)

Administrative

- Setting up future sales calls/meetings
- Ongoing: contacting previous clients to let them know of my new position
- Ongoing: Working on Simpleview daily traces
- Ongoing - Updating and adding accounts/clients to Simpleview
- November FAM Follow Up
- Preparing for Holiday Showcase
- Follow up on MPI St. Louis Educon-St. Louis Prospects
- Did reports for events attended, MPI Midwest & Holiday Showcase
- Follow up to Florida Encounter Prospects
- Follow up to Holiday Showcase Prospects
- Preparing for HelmsBriscoe in Washington, DC

Upcoming Events

- 1/3-5, 2011: HelmsBriscoe Annual Business Meeting & Partner Tradeshow (Washington, DC)
- 1/19: MPI MN Meeting
- 2/3-4: Chicago – Smith Bucklin Breakfast Meeting & Sales Calls

Summary of Traces in Simpleview

- Traces completed: 25
- Emails completed: 8

WASHINGTON OFFICE REPORT

December 2010

Leads/Prospects

- American Public Transportation Assn CEO Transit Meeting- 1/20-27/2012 100 rooms on peak/500 room nights- Lead sent to 3 hotels with Golf near or onsite
- US Travel Assn- Marketing Outlook Meeting 10/24-28/2011 250 rooms on peak/665 room nights- Client requested Sanibel Harbour Marriott and Hyatt due to proximity to airport
- Conference for Meineke Car Care Companies- 10/12-10/16/2011- 240 rooms on peak/960 room nights- Lead sent to hotels that could accommodate rear screen projection for 250pp
- Environmental Bankers Association- 1/15-19/2011 15 rooms overflow room block- Residence Inn Sanibel
- Auto Glass Replacement Council/Key Communications 2/28-3/3/2011 25 rooms on peak/55 room nights. Client requested rooms near the airport that could accommodate meeting space.
- Environmental Bankers Association- 1/15-19/2011 15 rooms overflow room block/60 room nights- Country Inn and Suites-Sanibel

Definite Business

- Environmental Bankers Association- 1/15-19/2011 15 rooms overflow room block/60 room nights- Country Inn and Suites-Sanibel

Lost Business

- Nutricia/CMP Meeting Services- 1/23-27/2011- (lead sent via CVENT) 60 rooms on peak. Group changed dates and went to Orlando.
- General Federation of Women's Clubs- 6/17-26/2013 370 rooms on Peak. Turned down due to meeting space and exhibit space that exceeded what we could offer.

Site Inspections

- Margie Kleppick President and CEO Partners in Medical Education, Inc.-December 27th- Sanibel Harbour Marriott

Educational Familiarization Trip to Fort Myers-12/1-12/6-2010

Guests: Meg Smith- Swissport
Karen Finchham- Pennsylvania Bar Institute
Natalie Woodard- Alliance for Community Health Plans
Pamela Kenworthy- National Exchange Carrier Association
Emilie Flynn-Professional Bail Agents of the US
Jill Coppola- Connecticut Business Industry Assn

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S A L E S R E P O R T

Sales Calls / Tvl Agents	Consumer	x	International
Meeting Planners	Tour Operator		RV / Motor Coach
FAMs / Site Inspection	SMERF		Education/Seminars

Name of Event: **Annual Receptive Tour Operator Appreciation Event**
 Dates of Event: **Dec 1 & 2, 2010**
 Event Location (City & State): **Orlando-Miami, FL**
 VCB Representative at Event: **Erick Garnica**

FAM Attendees: N/A Would You Recommend Next Year: Yes
 Lee County Partners Attending: Outrigger Beach Resort/ Pink Shell Resort & Spa/ West Wind Inn/
 Trianon Bonita Bay / Sunstream Hotels & Resorts/Residence Inn Sanibel Island Gateway/ Paradise
 Advertising / Universal Vacations / Island Inn Sanibel Island / Hyatt Regency Coconut Point Resort & Spa
 Tween Waters

Objective

- This annual event is held for Florida based Receptive Tour Operators and Destination Management Companies to show our appreciation for the International and Domestic visitors they send to The Beaches of Fort Myers & Sanibel.

Leads / Prospects

- List of attendees will be sent out to partners for follow up

Comments

- The appreciation event has become a tradition and operators as well as hoteliers look forward to it every year.
- This year we decided to have the event held at night to accommodate the clients busy day schedules and to allow better networking time for our partners.
- The operators were appreciative that the VCB hosts this annual event for them and that we take the time to say thank you to them personally.
- Gift bags were assembled for each guest with items provided by hotels and by the VCB office
- New partners attended for the first time and the luncheons were a great opportunity to meet with clients.

Trends

- A lot of the comments centered around on how the first quarter of 2011 will develop in terms of the global economy, this will definitely impact bookings further into 2011.
- Some operators pointed out that they are interested in featuring new product.

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**December 2010
Marketing Report for
UK, Ireland & Scandinavia**

CONTENTS

- VISIT USA TRAVEL AGENT ROADSHOW
- TUI
- VISIT USA BOARD MEETING
- AMERICA AS YOU LIKE IT
- VIRGIN HOLIDAYS EVENT
- BON VOYAGE
- PARADISE DESIGNS

SCANDINAVIA & IRELAND

- FLORIDAS BEACHES

PUBLIC RELATIONS

- MOTOR
- TAKE A BREAK
- FEEL GOOD DRINKS, YOGI PROMOTION
- USA DESK SCOTLAND NEWS
- MEET THE MEDIA
- SELLING LONGHAUL PARTY

Visit USA Road-Show 2010

- Jo Piani manned the booth at this year's Visit USA road-show - held on consecutive evenings in Brighton, Norwich and Newcastle. Each event had been affected by the cold weather and snow. Whilst Brighton was relatively unaffected with 86 agents attending with 38 member participants, Norwich was impacted but 57 agents still attended. Newcastle was really badly affected and only 25 agents were able to attend. However it was considered that the shows had been as successful as possible, despite the very adverse circumstances, with many complimentary comments received from both agents and participants on show content, locations & food. Plans for 2011 currently include Stanstead, Edinburgh & Bristol.
- **Brighton**
The event was held at the Grand Hotel on Brighton's seafront. The event started at around 5:30pm and comprised a tabletop networking session hosted by the various suppliers. There were around 20 destination/airline/attractions from across the USA represented. Agents had to answer pre-set questions on each of the exhibitor's products. Following this the agents were hosted to a seated (round tables of 10) American style buffet followed by a VUSA Q&A, entertainment, main destination quiz and various other prize giveaways. The weather forecast for this event was for snow later in the evening. We had 86 agents attend on the night with 10 apologies.
- **Norwich**
Norwich is located in the central east of the UK (East Anglia) about two hours drive north of London. The event was held at the Marriott – Sprowston Manor and followed the same format as the Brighton event. Overnight the whole of the UK was hit hard with snowfall making travelling extremely difficult. Some of the exhibitors and many of the agents were not able to make the event due to the weather. A total of 60 agents attended with 4 apologies. Norwich and the East Anglia are of interest as KLM have a mini-hub here which links strongly to their main hub in Amsterdam. KLM are commencing a non-stop service to Miami from Amsterdam effective March 2011.
- **Newcastle**
Newcastle is situated in the North East of England an hour's drive south of the border with Scotland. Newcastle was particularly badly hit by the snow that had hit the UK and it did impact the last of the events held here. The evening followed the same format at Brighton and Norwich. Held at the Hilton Gateshead the event attracted only 25 agents (over 100 had confirmed the previous Friday). One of the representation companies had pulled their participation based upon the weather but this apart all suppliers made it to the event. Like Norwich, Newcastle being based on the Eastern seaboard of the UK has good KLM airlinks to Amsterdam which give good opportunities for the new Amsterdam-Miami service.



TUI

- Jo Piani met with Sarah Lax – Product Director.
- Sarah has offered us the opportunity to host a fam for top UK travel agents.
- The trip will run as an incentive for the highest sellers and will be promoted in the TTG (Travel Trade Gazette which is one of the UK's top travel publications)
- TUI will be providing free air fares on Virgin worth approximately \$13,500 in total.
- Proposed Dates Jun 5-9, 2011. Jo Piani & Sarah Lax will be the hosts.

Visit USA Board Meeting

- Jo Piani attended meeting at the US Embassy. Topics discussed included: Travel agent training programme, Website, Distribution & Consumer Information Line, Visit USA Travel Planner, Visit USA Ball, Visit USA Roadshow, Meet the Media, Media Marketplace and Visit USA Week 2011.

America as you like it

- Hosted Maggi and Cath for lunch to thank them for all their support over the past year.
- This tour operator booked almost 2,000 room nights to Lee County in 2010, which is a significant number for a small specialist company.
- Jo is currently working with Philippa on press advertising with tactical offers.
- Provided Cath with new images for the brochure.

Virgin Holidays

- Attended a concert with the commercial & product directors in the Virgin box at the O2 arena in London.
- Other guests included directors from Delta, Dollar & Hilton therefore an excellent opportunity to network prior to the concert.

Bon Voyage

- Hosted Karen Niven and Jo Still for Christmas lunch in Southampton.

Paradise Advertising Designs

- Liaised regularly with both Katrina Salokar and Morgan Hendrix regarding tactical offers and brochure distribution.

Scandinavia & Ireland

Florida's Beaches Coalition

- Peter worked with BH&P regarding the shipment of materials for the Reiseliv show to be held in Norway in January 2011. Unfortunately the material for Miami CVB did not arrive at BH&P in time so they will ship their supplies directly to Oslo.
- Materials for MATKA (Finland) will be sent in early 2011.
- In conjunction with Gisela and her creative team at the Greater Miami CVB, we have now agreed the layout, design and images for the new posters/display materials to be used at future Florida's Beaches shows. We have received a quote for local production of the posters and a roll-up stand in the UK which will be compared with costs for production and shipment from the US (GMCVB to source).

Public Relations

- **Motor** (a family magazine published monthly with a huge travel section)
- Jo Piani worked with Lee Rose on Anders' road trip to Georgia and Fort Myers last year.
- The 4-page feature was published in Motor Magazine (circulation 650,000) in November.
- Anders wrote an excellent piece with lots of colourful images. He has a loyal following of readers who usually copy his trips.

- **Take a Break Magazine – Sally Dowling**
Sally has presented an opportunity to feature The Beaches of Fort Myers & Sanibel (or shared with a UK tour operator) in the Spring Special edition of Take a Break, on sale 7 April for 6 weeks.
- The 'Special' issues of Take a Break are additional, bumper issues of the top selling women's weekly magazine, Take A Break and have a circulation of approx. 500,000. The issues are on sale for 6 weeks and are aimed at the same target audience as the main magazine but with the benefit of a longer shelf life. The magazine has mass market appeal although the competition element appeals to a complete cross section of readers in terms of both age and demographic groups.
- This opportunity is for a Star Prize feature. This is a standalone double page spread and one of the most popular promotions in the magazine. The content of the prize is flexible but it would need to be taken in 2011/ 2012 and have a gross value of up to £4,000.
- **Feel Good Drink & Yogi DVD Promotion**
Jo has been working with Dom Ritson on final proofs for the Feel Good Drinks and Yogi promotion which launches shortly.



USA Desk Scotland News

- Working on editorial and images for a feature on FMS in the pre-launch edition of *USA Desk Scotland News* magazine (e-zine!)
- The feature will reach 500 individual, named Scottish travel professionals. It is a comparatively limited audience in size, but a closely targeted and potent one in effect!
- *USA Desk Scotland News* will launch on Friday 14 January.
- Jo Piani has agreed to include FMS in 4 editions in January and February.

Meet the Media Event

- JP sourced a venue for the Visit USA PR committee for this year's event. It will be held at The Groucho Club which is a famous private members club in Soho, Central London.
- The event will be held on Feb 7th.
- The 2011 Media Marketplace & Awards will be held on July 5th. The event's format was currently under review including a possible move to a more central W1 location.

Selling Long Haul Party

- JP was invited as a guest on the Visit USA table. The event is well attended by the cream of the travel industry with guests from the embassy, media and trade.

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**Monthly Report for
Germany, Austria & Switzerland
December 2010**

Fulfillment

1. December 2010

We fulfilled 27 information package requests by mail. Requests came from Germany, Austria, and Switzerland. The information packages included the German brochure, the area map, several hotel brochures, and a small note with a polite reference to the request.

Requests for brochures came in via:

- Website: 15
- Florida Sun: 7
- Email: 5
- Telephone: N/A

We distributed 150 Christmas presents (ornaments) to Germany, Switzerland, and Austria. Also we sent out additional we sent 50 Christmas cards.

Marketing

1. TUI co-op in America Journal

Information package USA & Advertisement in AMERICA Journal USA Information supplement for travel agents (10.000) and a supplement in AMERICA Journal (55.000) for consumers at ITB 2011 and VUSA events. This supplement was issued in the "America Journal" December 2010 issue. See attachment.

2. 20 jähriges Jubiläum Reisebüro Ilshofen

Mr. Weis (participant Willi Scharnow Fam) celebrated the 20th anniversary of his travel agency. He requested some brochures and give-aways which we sent to him. We sent 75 shell necklaces, 100 German brochures and 100 area maps.

3. German school holiday calendar

Attached please find very useful and important information for all our partners and hoteliers. Please feel free to share this nicely assembled calendar by Lena.

Public Relations

1. VUSA media networking events 2010

We distributed our CD press kit, German Visitor Guide, and area map. Throughout the entire event destination pictures were displayed at the location. VUSA PR assembled a "media CD/DVD" including electronic press kits of all participating VUSA members.

November 30th, 2010 - Hard Rock Café; Munich

41 key media met with 15 of the VUSA Germany members to discuss latest news and future plans.

December 2, 2010 - Park Hyatt; Hamburg

35 key media met with 15 of the VUSA Germany members to discuss latest news and future plans.

2. Willy Scharnow Press Release

Willy Scharow sent a press release in reference to the trade fam to our area and St. Pete to the German travel trade in December, (FVW, travel one, travel talk, touristic aktuell, travel tribune etc.) Please find a translation of the press release and a fam group picture attached.

FAM's

Marriott VIP fam with 5 tour operator product manager December 11-13, 2010
United Airlines sponsored the business class tickets for this fam for the tour operators.
Participants:

Johannes Reinders	Product Manager USA FTI Germany
Heike Pleuter	Head Product Manager Florida Meiers Weltreisen Germany
Carmen Knieps	Head Product Manager Florida TUI Germany
Katja Wagner	Head Product Manager Florida DERTOUR Germany
Yvonne Schmidt	Product Manager Thomas Cook Reisen / Neckermann Germany
Ms. Wally Hoppe	Director Travel Industry Sales Marriott International GSO Germany

COMMUNICATIONS REPORT

From December 1-31, 2010, the Communications Department assisted 62 journalists who are developing editorial coverage by providing press kits, information, photography, and/or videotapes. These journalists are talking and writing about the Lee County product, which will benefit the many businesses involved in the tourism industry.

Staff provided 56 submissions and hosted three journalists to Lee County. In addition, the staff provided information for three film/photo shoot inquiries.

WRITTEN WORK

Release: Lee County Tourist Development Council welcomes new chair

Release: VCB reports bed tax increase for latest fiscal year: Lee County tourism holds its own despite challenging year

Release: Cost-saving tips stretch travel budgets at The Beaches of Fort Myers & Sanibel

Release: Lee County VCB, Greater Fort Myers Chamber announce dates for Chrysalis awards program

Release: Lee County Visitor & Convention Bureau announces new nonstop air service from Denmark

Multi-media News Release: New animated 'Hugh Manatee' e-cards provide fun way to connect with family, friends this holiday season

Multi-media News Release: Prince Albert to join Art of the Olympians in Grand Opening Celebration

Release: Island hopping along The Beaches of Fort Myers & Sanibel: Take a vacation away from it all!

TDC Report to Industry

VCB E-Mail News Network

SUBMISSIONS

Information to Sue McGarvie and Blaik, writing for CANWEST (in flight magazine – Canada)

Images to Julie Henning, editor, ROAD TRIPS FOR GIRLFRIENDS

Images to Rebecca Wood, SPACE COAST LIVING

Information and Images to Jennifer Thomas, SOUTHWEST FLORIDA PARENT & CHILD MAGAZINE

Images to Clare Hunter, senior manager, BMI Publishing Limited (U.K.)

Information to Eric Staats, reporter, NAPLES DAILY NEWS

Images to Joe Berger, TRAVELTEC MEDIA

Information to Laura Ruane, reporter, NEWS-PRESS

Information to Brett Bralley, copy intern, COASTAL LIVING

Information to Chris Wadsworth, reporter, NEWS-PRESS

Images to Barbara Amrhein, PLATINUM MEDIA SERVICES

Images to Kristen Manieri, CANADIAN FLORIDA GUIDES

Images and information to Ashley Gibbons, WWW.ALLWAYSTRAVELLER.COM (U.K.)

Information to Bob Holzhei, freelance travel writer

Information to Erick Sharp, reporter, DETROIT FREE PRESS

Information to Brooke Porter, editor, GO MAGAZINE

Images to Julie Hatfield, freelance travel writer

Information to Kim Cool, travel editor, VENICE GONDOLIER

Information to Anne Gleason, editor, ARMY RESERVES

Information to Katie Johnson, reporter, NBC-2

Information to Gordon Henriksen, editor, FISK & FRI (Denmark)

Information to Celeste Baumgartner, freelance outdoor writer

SUBMISSIONS (Continued)

Information to Jill Salamone, editor, CINCINNATI WOMAN
Information to Elsebeth Mouritzen, reporter, BERLINGSKE TIDENDE (Denmark)
Images to Mike Faircloth, ULTIMATEISLANDGUIDE.COM
Information to Marla Neufeld, travel writer, RES IPSA LOQUITUR and THE RAINMAKER
Information to Paul Kelley, promotions, CBS RADIO BOSTON
Information to Valerie Alker, producer/host, WGCU-FM
Information to Tony Bartlett, writing for MEETINGS SOUTH
Information to Beth D'Addono, travel writer
Information to Elsbeth Russell, editor, SOAR MAGAZINE
Information to Southeast Tourism Society for Top 20 events list
Information to Matt Alderton, writing for MIDWEST MAGAZINE
Information to Susan Breslow Sardone, writing for ABOUT.COM
Information to Alan Macher, travel writer
Information to Carol Timblin, travel writer
Information to Lorrey Heverly, travel writer
Information to Joyce Hauser, editor, ARTS & LEISURE NEWS SERVICE
Information to Richard Varr, editor, GOOD SAM'S CLUB
Information to Beth Adams-Smith, travel writer
Information to Mary Beth Bond, adventure editor, TRAVELGIRL MAGAZINE
Information to Jane Stokes, editor/columnist, DREAMSCAPES (Canada)
Information to Amanda Miller Allen, travel writer
Information to Marcia Levin, travel writer
Information to Jayne Clark, travel writer, USA TODAY
Information to Tammy Wiser, FOX SPORTS
Information to Jeremiah Jacobsen, reporter, WINK-TV
Information to Olivier Roques Rogery, writer, FIGARO MAGAZINE (France)
Information to Anne Mignon, writer, TV MAGAZINE (France)
Information to Christian Luc Parison, writer, L'OFFICIEL VOYAGES (France)
Information to Vincent Guerrier, writer, CITY MAGAZINE (France)
Information to Jean Jacques Fresco, chief editor, TERRE SAUVAGE: MER & RIVAGES (France)

SOCIAL MEDIA

3,030 fans/37 posts to Facebook (www.Facebook.com/SocialLeeVCB)
345 followers/36 posts to Twitter (@SocialLeeVCB)

VISIT FLORIDA LEADS

Information for SOUTHERN LIVING
Information for OUTSIDE MAGAZINE

FILM/PHOTO SHOOT REQUESTS

Jennifer Foster, Foster Productions, Inc.
Chuck Martin, Chuck Martin Productions
Joy Haines, Island Girl Productions

LOCAL PUBLIC RELATIONS/MEETINGS

Kara Winton, PRiority Marketing
Rosame Piret, RP Marketing
Ilene Safron, Mainsail Video Productions

JOURNALISTS HOSTED

Susan Friedman, lifestyle editor, FLORIDA TRAVEL + LIFE
Louise Gaboury, writing for BEL AGE magazine (Canada)
Diane Macklin, freelance travel reporter

OTHER

Research and proofing for Inside Travel & Tourism TV news segment
Attended Visit Florida "Online Marketing in Today's Economy" webinar
Attended FACVB monthly webinar series
Wrote staff bio for Candice Cocco
Assisted with Holiday Nights at the Edison & Ford Winter Estates
Attended Art of the Olympians reception
Attended Trails & Tales presentation
Fort Myers Beach Chamber presentation

For further information: Please contact Nancy Hamilton, director of communications,
Telephone: (239)338-3500 E-mail: NHamilton@leegov.com

VISITOR SERVICES REPORT

Visitor Services: December 1, 2010- December 31, 2010

Visitors assisted: 18,994

	Dec 09	YTD	Dec 10	YTD
AIRPORT				
Visitors Assisted	13,758	220,684	18,994	250,600
Traveler's Guide-Booths	3,472	40,656	2,400	40,160
Traveler's Map-Booths	4,125	33,750	2,000	35,750
FLORIDA WELCOME CENTERS				
Traveler's Guide-Welcome Centers	4,704	29,064	--	19,600
Traveler's Map-Welcome Centers	6,250	10,000	5,000	17,500
VOLUNTEER IN-KIND SUPPORT				
Volunteer Hours donated	1,192	18,425	1,639	20,190
Value of volunteer hours donated * \$	\$24,138	\$373,106	\$34,173	\$420,961
CONFERENCE SERVICES				
# Conferences/Events	-	19	1	14
# Volunteers	-	123	7	98
Volunteer Hours donated	-	694	40	563

*based on \$20.85 per hour value, courtesy of www.independentsector.org

Top Information Requests

CATEGORY	DECEMBER
Accommodations	Courtyard by Marriott GCTC
Attractions	Beaches
Activities	Shopping

Top Visitor Origin: Domestic

1. Ohio
2. New York
3. Illinois
4. Pennsylvania
5. Michigan

Top Visitor Origin: International

1. Germany
2. Canada
3. UK
4. Austria
5. Netherlands

Visitor Services Overview

Community & Partner Outreach:

- 12/2: Captiva Cruises product education trip to Useppa Island, 50 volunteers
- 12/3 – 4: Friends of Florida State Parks Conference, 7 volunteers, Hyatt Regency Coconut Point Resort & Spa
- 12/3: Art of the Olympians Airport Reception
- 12/6 & 12/15: The Butterfly Estates product education trips, 25 volunteers
- 12/8: Annual Volunteer Holiday Potluck, Lakes Regional Park
- 12/11: Lee County START Heart Walk, downtown Fort Myers
- 12/15: Lee County Port Authority Airport Holiday Luncheon
- 12/16: Meeting with Dan Schwartz, Barbara B. Mann Performing Arts Hall
- 12/22: Miromar Outlet Volunteer Lunch

Training & Tourism Education:

- 12/1: Meeting with Chrysalis Awards Tourism Committee
- 12/3: Meeting with Al Gulamali, Lee County Port Authority
- 12/9: Guests First promotion at Airline Manager's Meeting, Lee County Port Authority
- 12/13: Southwest Florida Attractions Association meeting
- 12/15: ASTD meeting

Guests First training – 100 tourism industry professionals

- 12/7: Resort at Marina Village
- 12/9: Sundial Beach Resort
- 12/14: Holiday Inn Airport
- 12/15: Hyatt Regency Coconut Point Resort & Spa
- 12/16: Harborside Event Center
- 12/20: Hilton Garden Inn
- 12/21: Floridian Airport Inn

For further information, please contact Judi Durant at 239.590.4855 or jdurant@leegov.com.

NEW PRODUCT DEVELOPMENT REPORT

<u>Date(s)</u>	<u>Meeting/Event</u>
December	
1	Sanibel Trails & Tales presentation @ JN 'Ding' Darling Education Center Facilitate: River District Partner meeting
2	Holiday Nights decorating @ EFWE
3	Int'l Mtn. Bike Association presentation @ Caloosahatchee Park
4-5	Facilitator @ Friends of FL State Parks Workshop @ Sanibel Harbour Marriott
7	Matanzas Pass Preserve program
8	Conference Call w/Superior Small Lodging Board of Directors
9	Conference Call w/ Sanibel Trails & Tales Coalition
10	TDC meeting Attend: FL Creative Coast-art night in Matlacha
11	Attend: SKIM Jam event @ South Seas Resort
13	Meeting: START board of directors
14	Meeting: Society of Ethical Ecotourism board of directors
16	Webinar: Florida Aquaculture
20	Meeting w/Sanibel City Manager & Trails & Tales Coalition
21	Meeting @ Sanibel Community House re: Shellabration 2012 Solstice Cruise w/Randall Research Center

Attachments:

- A- Sanibel Trails & Tales Program announcement
- B- Benefits of Art Festivals Letter & article

For additional information contact Nancy MacPhee at 239.338.3500 or nmacphee@leegov.com

Sanibel Trails & Tales Coalition presents a new visitor experience produced by a unique partnership based on a shared vision to protect and preserve Sanibel & Captiva Islands through education....



Conducted the first Wednesday monthly

9:30-10:30am at the

J.N. "Ding" Darling Wildlife Education Center

1 Wildlife Drive Sanibel, FL 33957

Register @ www.sanibeltrailsandtales.com

**The Bailey-Matthews Shell Museum * J.N. "Ding" Darling National Wildlife Refuge*

CROW ~ Clinic for the Rehabilitation of Wildlife

*SCCF ~ Sanibel Captiva Conservation Foundation * Sanibel Historical Museum and Village*

Eco-incentives free to each attendee!

National report documents benefits of arts festivals

SPECIAL TO FLORIDA WEEKLY

In a first-of-its-kind report, "Live from Your Neighborhood: A National Study of Outdoor Arts Festivals" finds outdoor arts festivals attract a range of audiences, they enhance their communities as creative placemakers, and they are a gateway to arts attendance.

"More than 100 million Americans attend arts and cultural festivals each year. It is time that we start to examine these festivals more closely," said National Endowment for the Arts Chairman Rocco Landesman. In his message in the report, Mr. Landesman encouraged audiences to share their reactions to the survey on the NEA Art Works blog.

"Live from Your Neighborhood" is the first-ever survey of U.S. outdoor arts festivals. The survey analyzes data from 1,413 outdoor festivals in nearly every state and Washington, DC. The survey reflects a cross-section of outdoor arts festivals in artistic disciplines such as music, visual arts and crafts, dance, folk and traditional arts, theater, literature and film. Festival audiences, programming, staffing and finances are also reviewed. Seven case studies profile a variety of outdoor festivals in large and small communities around the country, such as the Lowell Folk Festival in Lowell, Mass. and the Tamejavi Festival in Fresno, Calif. Arts festivals are one of the most popular arts activities according to the NEA's Survey of Public Participation in the Arts, reflecting the growing demand for informal and



COURTESY PHOTO

Artfest Fort Myers draws thousands to the River District every year.

interactive arts experiences.

Among the main findings:

Outdoor arts festivals are creative placemakers, and are integrated into the community. More than half of the festivals surveyed (59 percent) have occurred in their host communities for more than 10 years. Outdoor arts festivals are small-town affairs, with most festivals (77 percent) taking place in towns with fewer than 250,000 residents, and 39 percent of these in towns

with fewer than 10,000 people. Festivals also provide education, employment, and volunteer opportunities to local residents. Outdoor arts festivals rely heavily on volunteers: 61 percent of festivals have year-round volunteer staff. On average, festivals have two to three paid, full-time, year-round staff, two to three part-time staff, and 15 volunteers. The case studies also reveal that volunteers provide professional services of significant value (marketing, event logistics, and fundraising) and take pride in their role as ambassadors for both the community and artists.

Most festivals have strong public-private partnerships, with 88 percent receiving support from corporate sponsors, foundations, or local, state, or federal government. Additionally, the case studies note that successful outdoor arts festivals present special challenges that require working partnerships with local government and public agencies. To best manage the myriad logistical and programmatic demands, festivals require support from municipal departments such as police, parks and recreation, tourism, street and sanitation services, and schools.

Outdoor arts festivals have diverse art forms and audiences. Typical outdoor festivals showcase many different art forms, with music (81 percent) and visual arts and crafts (67 percent) being the most common. Outdoor arts festival audiences are more representative of the U.S. population than audiences for many other types of arts activities; in

general, Hispanic and African American audiences account for a higher percentage of audiences at outdoor arts festivals than at most "benchmark" arts activities (such jazz or classical music concerts, opera, plays, ballet, or museums). Festivals yield a wide range of attendance rates, from fewer than 1,000 to 500,000 people or more. Nearly half (45 percent) of festivals reported audiences of fewer than 5,000 people, and another 25 percent reported 10,000-49,900 attendees. The largest festivals, attracting more than a half-million people, were in urban areas such as Chicago, Ill., San Diego, Calif., and Washington, DC.

Outdoor arts festivals are a gateway to the arts. Many outdoor arts festivals share characteristics that make them appealing to audiences. Most festivals are free (59 percent), and many others offer discounted tickets. Festivals present high-quality, curated arts programming for audiences. Most outdoor arts festivals (64 percent) feature arts education opportunities. In the case studies, audiences said they liked the informal, family friendly setting where they can talk directly with participating artists. Audiences also said that they discovered art they would not have sought out on their own, suggesting that outdoor arts festivals are a bridge to new kinds of arts attendance.

For a copy of the full report, visit www.nea.gov/news/news10/NEA-Festivals-Report.html. ■



Southwest Florida's Premier Art Festival

December 18, 2010

Nancy MacPhee
VCB
12800 University Dr. Suite 550
Fort Myers, FL 33907

Dear Nancy:

I wanted to share this Florida Weekly article with you in the event that you had not seen it.

While we did not provide the article information to Florida Weekly we are pleased that they chose to pick up the wire story. A report of this type with its quote "outdoor art festivals are a gateway to the arts" and funded by the prestigious National Endowment for the Arts is a grand affirmation of the TDC and Foundation's vision in continuing to generously support ArtFest Fort Myers.

We have read the full report and will share information from it in the future.

Thank you for your on-going support and we look forward to seeing you in February at ArtFest Fort Myers.

Happy Holidays to you and your family.

Sincerely,

A handwritten signature in black ink, appearing to read "Sharon", with a long horizontal flourish extending to the right.

Sharon McAllister
Executive Director

ArtFest Fort Myers, Inc.
2443 First St.
Fort Myers, FL 33901
Voice: 239-768-3602
Fax: 239-337-0803
info@artfestfortmyers.com
www.ArtFestFortMyers.com

Media Watch January 2011

PRINT

Media	Issue	Edition/ Position	Circulation	Ad Size
Destination Out-of-State Newspaper Insert	1/12/11	Indianapolis Star, Columbus Dispatch, Cincinnati Inquirer, Milwaukee Journal-Sentinel, Minneapolis Star-Tribune, Boston Herald/ Globe	400,000	4-page, tabloid insert
Horizon Travel Magazine	Jan/Feb 2011	Canada/ Visit Florida Co-Op Section	250,000	2-Page Spread
Lonely Planet Magazine	January 2011	UK		Full Page
Visit Florida Official Florida Transportation Map	2011 Annual	Distributed at Florida Welcome Centers and Trade Shows	1,250,000 (Annual)	Full-Page/ Back Cover
Visit Florida Magazine	2011 Annual	SW Florida Section	300,000 (Annual)	Full Page
Minnesota Twins & Boston Red Sox Yearbooks	2011 Baseball Season		1,000,000 (Annual)	Full Page
Florida Camping Directory and Woodall's Camping Directory	2011 Annual	South Edition	1,000,000 (Annual)	1/4 Page
Official Florida Travel Industry Guide	2011 Annual	National Distribution	100,000 (Annual)	Full Page

ONLINE

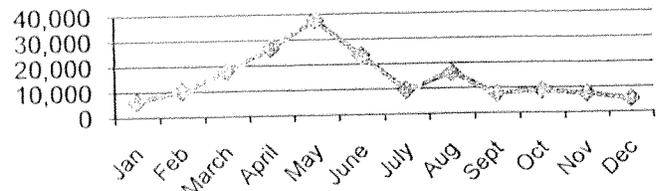
Media	Issue	Edition/ Position	Circulation	Ad Size
Search Engine Marketing	2011 Annual Program	Paid Search (Google)	Annual	N/A
Manatee Message Campaign	Annual	Viral/ Social Sharing Campaign		ManateeMessage.com
Destination Consumer Opt-in Database Email	1/6/11	"Beaches & Shelling" Retail Vacation Offers Email	130,000	Email Campaign

Marketing Impact Report DECEMBER 2010

INQUIRY ACTIVITY

	<u>DEC 2010</u>	<u>YTD*</u>
Phone/ Mail	4,019	152,428
Internet	1,127	18,555
VCB Office	27	401
Total	5,173	171,384

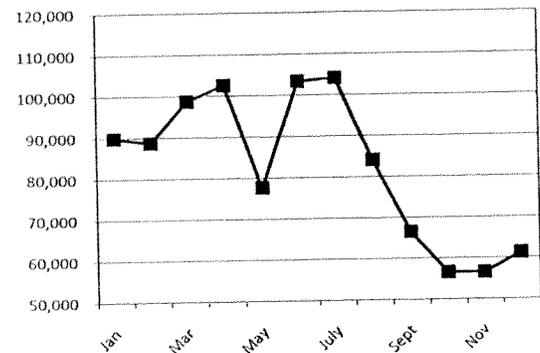
2010 Inquiry Activity



INTERNET ACTIVITY

<u>HBX Numbers (user-based)</u>	<u>DEC 2010</u>	<u>YTD*</u>
Visitors	61,179	988,673
Pageviews	139,548	2,610,422
Avg. Time Spent on Site	12:42	n/a
Avg. Pages Viewed Per Visit	2.30	n/a
Opt-ins	125	4,334
Accommodation Searches	41,004	390,509
E-Book New Visitors	777	11,190

2010 Visitors (HBX)



TOP WEBSITE VISITOR DMAs

1. Fort Myers/ Naples
2. Minneapolis/ St. Paul
3. New York
4. Chicago
5. Orlando/ Daytona Beach/ Melbourne
6. Tampa/ St. Pete
7. Boston
8. Miami/ Fort Lauderdale
9. Atlanta

TOP 5 SEARCH ENGINES

1. Google
2. Yahoo
3. Bing
4. Google Canada
5. AOL

TOP 5 MOST REQUESTED PAGES (In Page Views)

1. Home Page
2. Accommodations
3. Events
4. VG Order Form
5. Activities

TOP KEYWORDS

- | | |
|-----------------------|---------------------|
| 1. fort myers florida | 6. ft myers |
| 2. fort myers | 7. ft myers florida |
| 3. sanibel island | 8. fort myers fl |
| 4. fort myers beach | 9. ft myers beach |
| 5. ft myers fl | |

*YTD data is based on Jan-Dec calendar year.

Media Watch January 2011

PRINT

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ONLINE

Media	Issue	Edition/ Position	Circulation	Ad Size
Search Engine Marketing	2011 Annual Program	Paid Search (Google)	Annual	N/A
Manatee Message Campaign	Annual	Viral/ Social Sharing Campaign		ManateeMessage.com
Destination Consumer Opt-in Database Email	1/6/11	"Beaches & Shelling" Retail Vacation Offers Email	130,000	Email Campaign

Media Watch
January 2011

BROADCAST/ OUT-OF-HOME

Media	Issue	Edition/ Position	Circulation	Ad Size
Radio – Indianapolis, Columbus, Cincinnati	1/10 – 2/6/11 (4 weeks)	Metro Traffic Campaign "Today's Weather on The Beaches of Fort Myers & Sanibel is..."		:30 & :15 Spot Schedule
Television – Indianapolis, Columbus, Cincinnati	1/10 – 4/25/11 (9 weeks)	Brand TV – "Sunrise" & "Traditions"		:60 & :30 Spot Schedule

2010 Island Treasures RV Tour – Activity Report
 DECEMBER 2010

Monthly/ YTD 2010 Recap Totals

# of Events Attended / # of Days	Approximate Attendance at Events	# of Collateral Pieces Distributed
6 / 11	17,700	3,112
YTD: 97/187	357,850	116,971

Monthly Event Detail

Date(s)	Event/ Location	Approx Event Attendance	Approx # of Visitors to the RV	Event Success Scale 1 – 10*	Partner Brochures Distributed	Necklaces Distributed	Visitors Guides Distributed	Stickers/ Misc Brochures Distributed
12/2	Florida Welcome Center - Jennings	500	200	9	200	200	100	100
12/3-5	Alt 41 Tour/ NFL Tampa Bucs Pre-Game	5000	400	9	200	300	50	50
12/9-10	Mall at Millennia	5000	200	9	100	100	50	24
12/17-18	Merritt Island Mall	2000	100	9	100	100	40	50
12/19	NFL Tampa Bay Bucs Pre-Game Florida	5000	500	9	200	400	60	100
12/27	End of Season Super Sale Open House SunCoast RV	200	200	9	200	240	100	48
	<ul style="list-style-type: none"> Welcome Center: greeted visitors as they entered Florida from GA. Many were heading south with openings in their itinerary. They were very interested to hear more about the area. Distributed a lot of maps and necklaces. Many conversations about what to do, how far, where to stop along the way. We were impromptu, street-side travel guides. On the way back from the GA border we took the back roads of western FL. Gorgeous country and lots of really nice people. We made stops at country stores and restaurants. We were definitely the eye-catch of the day. This is grassroots marketing at its finest. Lots of interest from many people who, "have never been." We stopped across the street from Raymond James stadium for a pre-game promotion. Thousands of folks. Many stopped in to get info and talk about Fort Myers and Sanibel. Impromptu stops to meet shoppers in Mall at Millennia, the Merritt Island mall to hit the Christmas shoppers (not literally). Tons of visitors looking for suggestions on where to go in Florida. So we told them! As the year wrapped up, we took advantage of an RV Super Sale. We were right at the front door, met a ton of snowbirds and Florida residents looking for travel info. All were very impressed with the RV, the Vacation Guide, maps and of course stories on where to go and play! WHAT A RIDE, WHAT A GREAT YEAR! 							

*Event Success Scale = 1 poor/ 10 successful

Media Watch
 January 2011

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Lee County Sports Authority
Monthly Activity Report
November 2010

Estimated Economic Impact*

Hotel Room Nights Sold

Month Total =	19,173
Roy Hobbs World Series	10,742
WOA Congress of the Americas	200
FHSAA 2A Swimming Regionals	224
Senior Softball Winter Nationals	7,748
FHSAA Cross Country Districts	259

Event Participants

Month Total =	6,170
Roy Hobbs World Series	3,162
WOA Congress of the Americas	50
FHSAA 2A Swimming Regionals	308
Senior Softball Winter Nationals	2,086
FHSAA Cross Country Districts	564

Event Spectators

Month Total =	5,424
Roy Hobbs World Series	2,976
WOA Congress of the Americas	50
FHSAA 2A Swimming Regionals	140
Senior Softball Winter Nationals	1,788
FHSAA Cross Country Districts	470

Direct Impact

Month Total =	\$8,475,923
Roy Hobbs World Series	\$6,135,400
WOA Congress of the Americas	\$86,912
FHSAA 2A Swimming Regionals	\$43,500
Senior Softball Winter Nationals	\$2,108,236
FHSAA Cross Country Districts	\$101,875

Total Direct and Indirect Economic Impact

Month Total =	\$14,154,791
Roy Hobbs World Series	\$10,246,118
WOA Congress of the Americas	\$145,143
FHSAA 2A Swimming Regionals	\$72,645
Senior Softball Winter Nationals	\$3,520,754
FHSAA Cross Country Districts	\$170,131

*Estimates are based on data collected from event organizers, the Lee County Sports Authority and the SOC. Economic impact figures are derived using a model supported by the Florida Sports Foundation. All estimations are based on historical trends.



Department Activity Summary December 2010

December 1, 2010

- Meet with Tamara Pigott (Lee County VCB) regarding sports update
- Attended county managers staff meeting
- Attend monthly sports meeting
- Miromar Outlet Mall Hospitality Reception

December 1 - 4, 2010

- International Softball Association's National Convention – Tucson, AZ

December 3, 2010

- Meet with Colleen DePasquale (Courtyard Marriott Town Center) and Allison Gruber (Lee County SOC) regarding sports housing

December 4 - 5, 2010

- FGCU Holiday Baseball camp – Boston Red Sox Player Development Complex

December 4 - 12, 2010

- Florida Senior Games – various Lee County facilities

December 6, 2010

- Site visit with Florida Senior Games

December 7, 2010

- Attended Lee County Sports Hospitality update meeting
- Attended Jim Lavender's retirement reception

December 8, 2010

- Attended SWFAA meeting

December 8 - 11, 2010

- 2010 National Fastpitch Coaches Association – San Diego, CA

December 9, 2010

- Meeting with Jason Camp (Big C Events) regarding future sports events

December 10, 2010

- Attended TDC meeting

December 10 - 11, 2010

- Captiva Holiday Skim Board Pro-Am - South Seas Island Resort



December 12 - 16, 2010

- US Sports Congress – Sanibel Harbour Resort

December 12, 2010

- Attended US Sports Congress Florida industry dinner

December 13, 2010

- Meeting with Doug Meurer (Lee County Admin) regarding City of Palms Park
- Attended Florida Senior Games appreciation reception

December 14, 2010

- Attended US Sports Congress reception

December 16, 2010

- Attended site visit with Debra Horn (AAU)
- Meeting with Bill Hammond (Lee County Admin) regarding sports issues

December 17, 2010

- Attended Intercollegiate Tennis Association's Annual Trade Show – Naples, FL

December 28 - 30, 2010

- Basketball Brothers Invitational – various Lee County gym's
- Perfect Game National Underclass Showcase – Terry Park and Boston Red Sox Player Development Complex

Lee County Visitor and Convention Bureau
FY 2010-11
FIRST QUARTER BUDGET REPORT

	Budget*	1st Quarter Expenditures	% of Budget Expended	Unspent
Personnel Services				
Salaries	\$ 1,173,393	267,944	23%	\$ 905,450
FICA Taxes	89,408	19,666	22%	69,742
Retirement	129,634	29,664	23%	99,970
Health Insurance	275,838	76,100	28%	199,739
Life Insurance	3,501	1,176	34%	2,325
Dental Insurance	10,101	3,034	30%	7,067
Disability Insurance	3,757	1,276	34%	2,481
Worker's Comp.	12,802	3,200	25%	9,602
Total Personnel	\$ 1,698,434	\$ 402,060	24%	\$ 1,296,374
Operating Expenses				
Professional Services	\$ 107,500	\$ 19,022	18%	\$ 88,478
County Data & Networking	132,113	33,028	25%	99,085
Data Processing	32,000	320	1%	31,680
Contracted Services	1,575,000	272,621	17%	1,302,379
Local Mileage	9,775	1,151	12%	8,624
Travel	158,000	35,857	23%	122,143
Interview Expenses	-	1,000	NA	(1,000)
Motor Pool Charges	2,427	435	18%	1,992
Telecommunications	49,426	4,565	9%	44,861
Freight and Postage	55,000	4,149	8%	50,851
Building Lease	283,000	74,752	26%	208,248
Office Equipment Rental	10,050	2,101	21%	7,949
Self-Insurance Assessment	5,060	1,265	25%	3,795
Printing/Binding/Copying	44,000	7,678	17%	36,322
Advertising	6,609,086	905,460	14%	5,703,626
Promotions	899,000	239,087	27%	659,913
Indirect Cost	197,162	-	0%	197,162
Miscellaneous	300	-	0%	300
Office Supplies	14,100	2,214	16%	11,886
Reference Materials	17,100	5,730	34%	11,370
Memberships	40,000	12,773	32%	27,227
Training & Seminars	17,500	691	4%	16,809
Furniture and Equipment	6,500	1,003	15%	5,497
Total Operating	\$ 10,264,099	\$ 1,624,901	16%	\$ 8,639,198
Total	\$ 11,962,533	\$ 2,026,961	17%	\$ 9,935,572

* Includes FY10 carryover of \$302,686.

Tourist Development Tax Trust Main Fund						Stadium Fund					
	FY 10-11	FY 11-12	FY 12-13	FY 13-14	FY 14-15		FY 10-11	FY 11-12	FY 12-13	FY 13-14	FY 14-15
Beginning Fund Balance	8,026,191	6,431,200	5,138,895	3,846,590	2,554,285	Beginning Fund Balance	5,967,344	6,750,359	6,395,474	4,936,258	4,009,271
<u>Revenues *</u>						<u>Revenues *</u>					
Tourist Taxes (53.6%)	11,792,000	11,792,000	11,792,000	11,792,000	11,792,000	Tourist Taxes (20%)	4,400,000	4,400,000	4,400,000	4,400,000	4,400,000
Interest on Investments	50,000	50,000	50,000	50,000	50,000	Interest on Investments	30,000	30,000	30,000	30,000	30,000
Less 5% Anticipated Receipts	(4,000)	(4,000)	(4,000)	(4,000)	(4,000)	Less 5% Anticipated Receipts	0	0	0	0	0
Transfers In From 30101	872,552	872,552	872,552	872,552	872,552	Twins/Red Sox/County Contrib	80,000	80,000	77,500	77,500	77,500
						Stadium Rents	300,000	600,000	800,000	800,000	800,000
Total Revenues	12,710,552	12,710,552	12,710,552	12,710,552	12,710,552	Total Revenues	4,810,000	5,310,000	5,307,500	5,307,500	5,307,500
<u>Expenditures</u>						<u>Expenditures</u>					
Clerk Tax Collection Services	627,000	627,000	627,000	627,000	627,000	Red Sox Stadium Debt	1,408,863	3,031,883	3,023,908	3,030,183	3,094,933
OPEB						Loan Payment to MSTU Fund	716,285	687,633	658,982	630,330	601,679
Attractions Marketing	325,000	325,000	325,000	325,000	325,000	Hammond Stadium Debt	808,710	813,910	817,910	815,293	810,781
Sports Authority	795,720	795,720	795,720	795,720	795,720	Stadium Insurance	132,980	140,959	329,416	349,181	370,132
VCB Operations **	11,962,533	11,659,847	11,659,847	11,659,847	11,659,847	Three Parks Positions	100,000	100,000	100,000	100,000	100,000
Capital Planning	595,290	595,290	595,290	595,290	595,290	Stadium R & R	80,000	80,000	77,500	77,500	77,500
						Major Maintenance **	780,147	810,500	1,759,000	1,232,000	953,300
Total Expenditures	14,305,543	14,002,857	14,002,857	14,002,857	14,002,857	Total Expenditures	4,026,985	5,664,885	6,766,716	6,234,487	6,008,325
<u>Ending Reserves</u>						<u>Ending Reserves</u>					
VCB General Reserves	5,966,266	4,673,981	3,381,676	2,089,371	797,066	Ending Reserves	6,750,359	6,395,474	4,936,258	4,009,271	3,308,446
Sports Authority Reserves	464,914	464,914	464,914	464,914	464,914						
Total Ending Reserves	6,431,200	5,138,895	3,846,590	2,554,285	1,261,980						
* Revenues based on current projection of \$22,000,000 for FY 10-11 and flat thereafter											
** Includes Carryovers											

Beach & Shoreline Fund					
	FY 10-11	FY 11-12	FY 12-13	FY 13-14	FY 14-15
Beginning Fund Balance	14,296,693	7,253,337	6,820,810	6,466,031	6,111,252
Revenues *					
Tourist Taxes (26.4%)	5,808,000	5,808,000	5,808,000	5,808,000	5,808,000
Interest on Investments	50,000	50,000	50,000	50,000	50,000
Less 5% Anticipated Receipts	(2,500)	(2,500)	(2,500)	(2,500)	(25,000)
Total Revenues	5,855,500	5,855,500	5,855,500	5,855,500	5,833,000
Expenditures					
Transfer to General Fund	1,024,500	1,024,500	1,024,500	1,024,500	1,024,500
Transfer Prior Year Interest	273,232	127,748	50,000	50,000	50,000
Trans. to Main Fund-Capital Program	595,290	595,290	595,290	595,290	595,290
Projects **	4,540,489	4,540,489	4,540,489	4,540,489	4,540,489
Project Carryovers	6,465,345	0	0	0	0
Total Expenditures	12,898,856	6,288,027	6,210,279	6,210,279	6,210,279
Ending Reserves	7,253,337	6,820,810	6,466,031	6,111,252	5,733,973
* Revenues based on current projection of \$22,000,000 for FY 10-11 and flat thereafter					

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

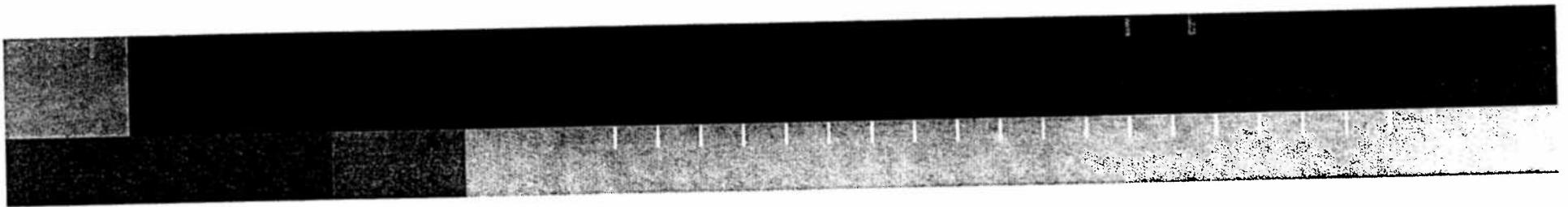
Visitor Profile and Occupancy Analysis
November 2010

Prepared by



January 14, 2010

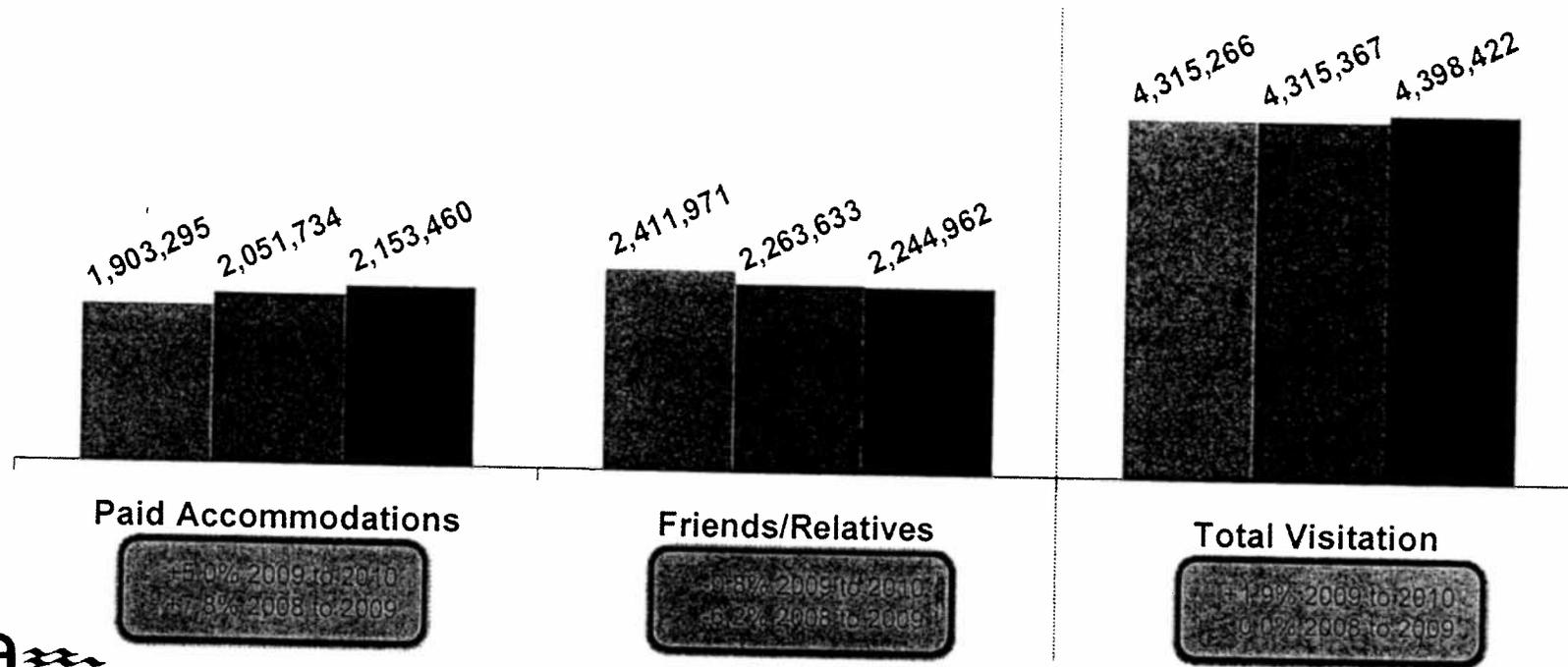
Visitor Profile Analysis



Visitation Estimates – Calendar YTD Summary

- For calendar year-to-date 2010, estimated paid accommodations visitation was 5% higher than the same period the prior year while visitation among those staying with friends/relatives was flat year-over-year. The net result was a slight increase in total visitation.

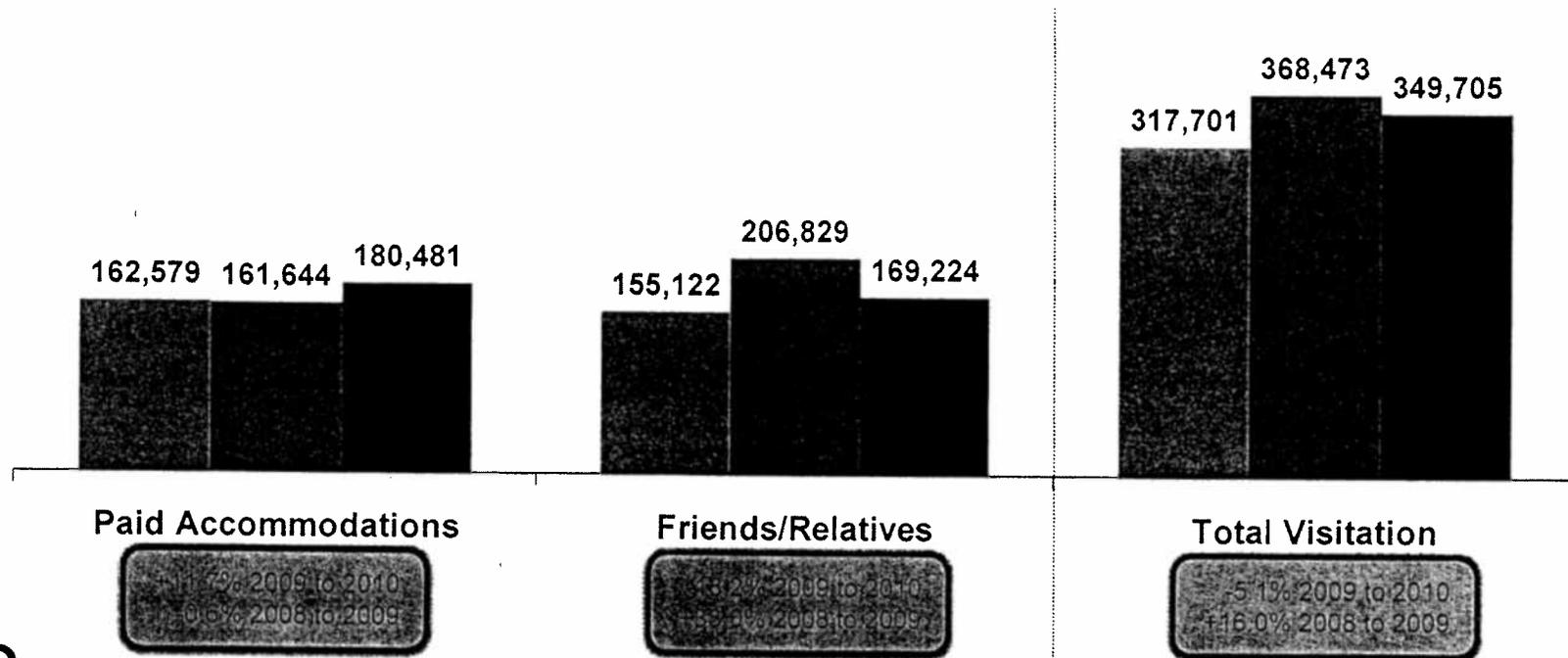
■ Jan-Nov '08 ■ Jan-Nov '09 ■ Jan-Nov '10



Visitation Estimates – November

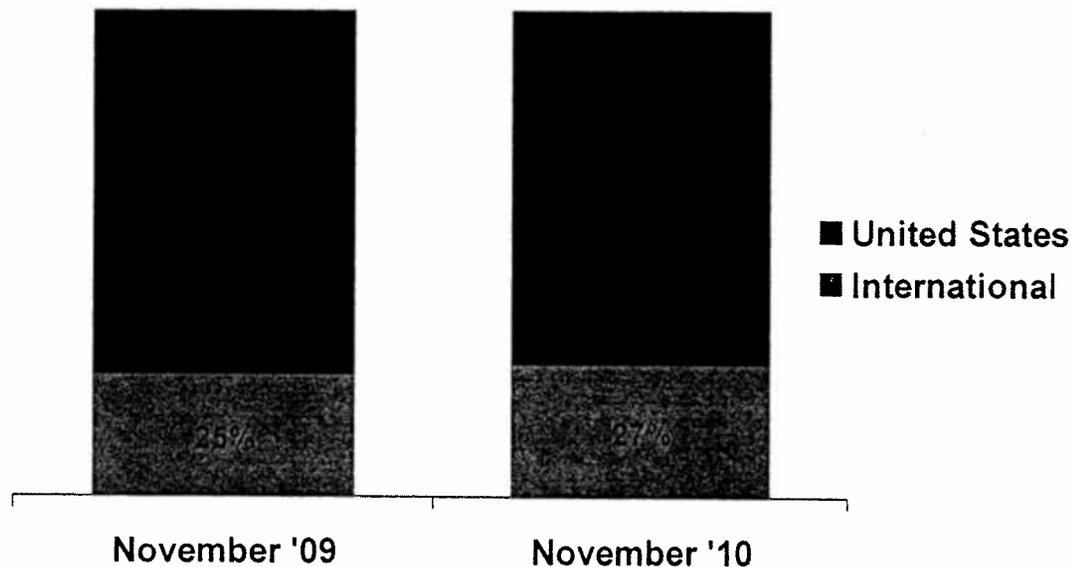
- During November 2010, Lee County hosted approximately 180,000 visitors staying in paid accommodations and just over 169,000 staying with friends or relatives while visiting the County, for a total of 350,000 visitors.

■ November '08 ■ November '09 ■ November '10



Paid Accommodations Visitor Origin – November

- Nearly three-fourths of November 2010 visitors staying in paid accommodations were U.S. residents (73%) -- roughly the same proportion as last year.
- Canada and the UK contributed the largest share of international visitors staying in paid accommodations (15% and 7% respectively) during November 2010.



Origin	2009	2010
Canada	6%	15%
UK	9%	7%
Germany	7%	1%
Other International	3%	4%

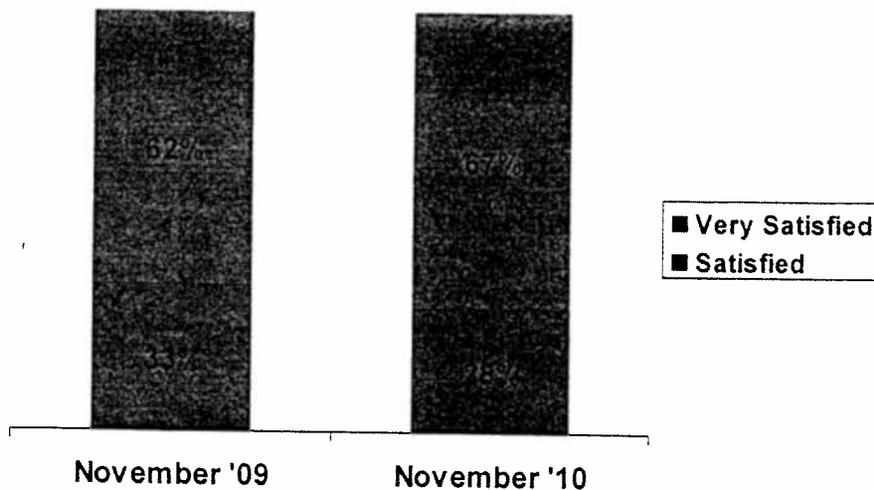
Visitor and Travel Party Demographics Profile

- The demographic profile of a Lee County visitor was fairly similar year-over-year for the month of November.

	November	
	2009	2010
Base: Total Responding	207	201
Average age	52.8	53.7
Average annual household income	\$101,800	\$96,700
Married	76%	73%
Traveling as a couple	51%	47%
Traveling with children under 18	18%	19%
Mean travel party size	2.8	2.8

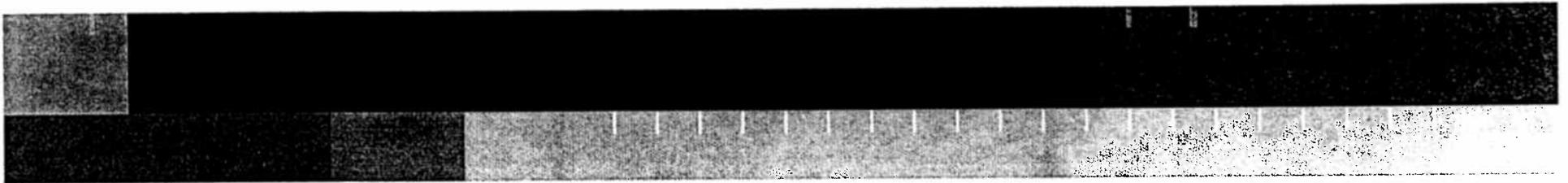
Satisfaction with Visit

- Visitor satisfaction remained high in November, with three in five visitors reporting they were “very satisfied” with their visit.
- Most visitors say they will recommend Lee County to friends/family and visit Lee County again themselves.



Likely to:	Nov '09	Nov '10
Recommend Lee County	82%	80%
Return next year	68%	60%

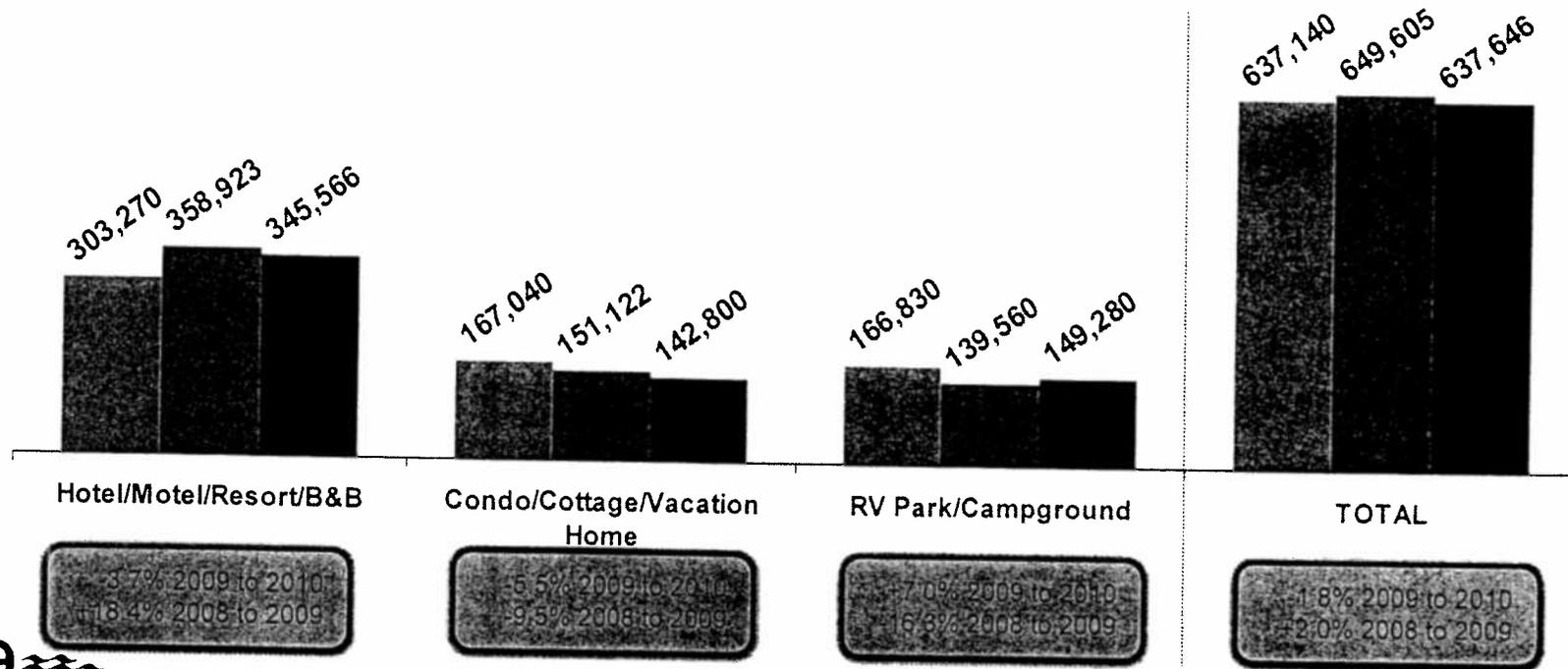
Occupancy Analysis



Available Room Nights – November

- Total available room nights decreased slightly from November 2009 to November 2010 (-1.8%).
- Hotels/motels/resorts and condos/vacation homes experienced a decrease in available room nights while RV Parks/campgrounds saw an increase.

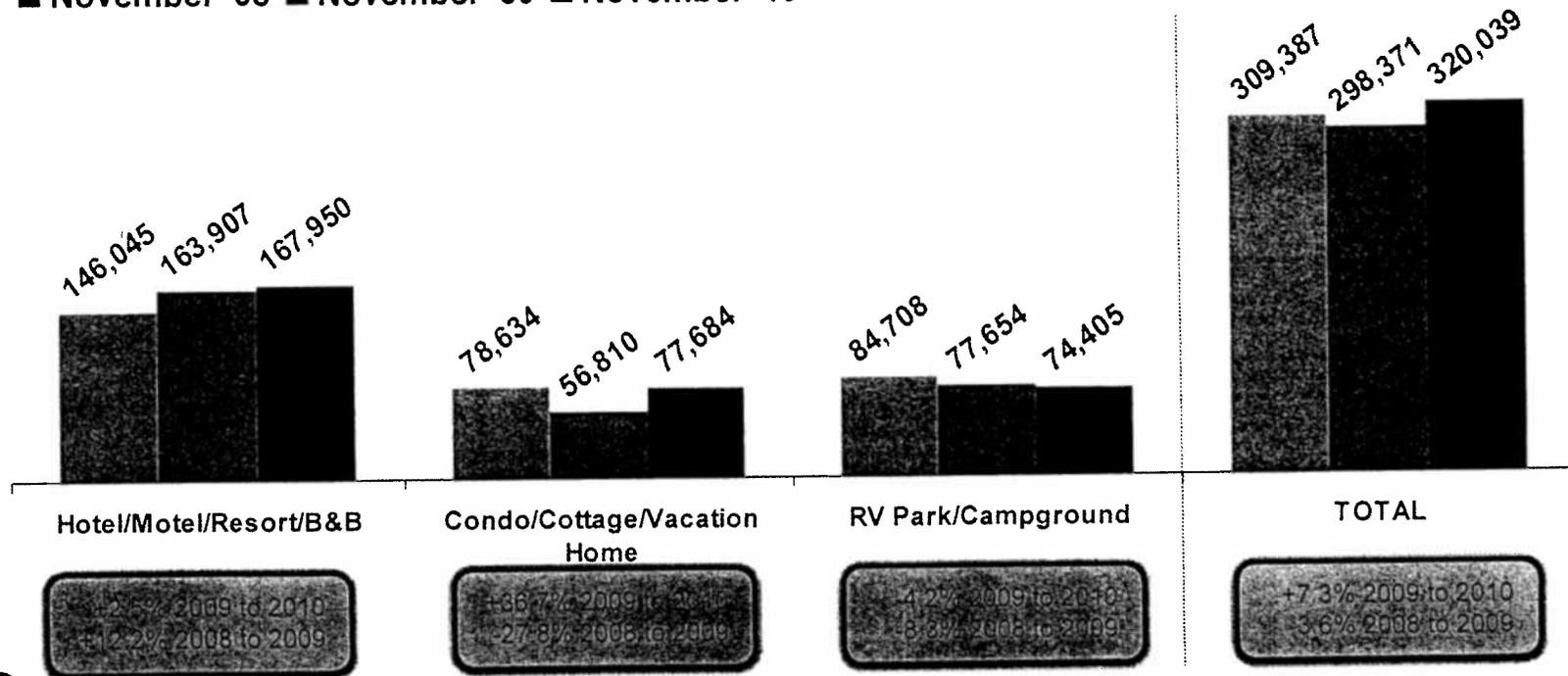
■ November '08 ■ November '09 ■ November '10



Occupied Room Nights – November

- In contrast, occupied room nights showed a healthy increase (+7.3%) from November 2009 to November 2010.
- Hotels/motels/resorts and condos/vacation homes reported an increase but RV Parks/Campgrounds posted a decline.

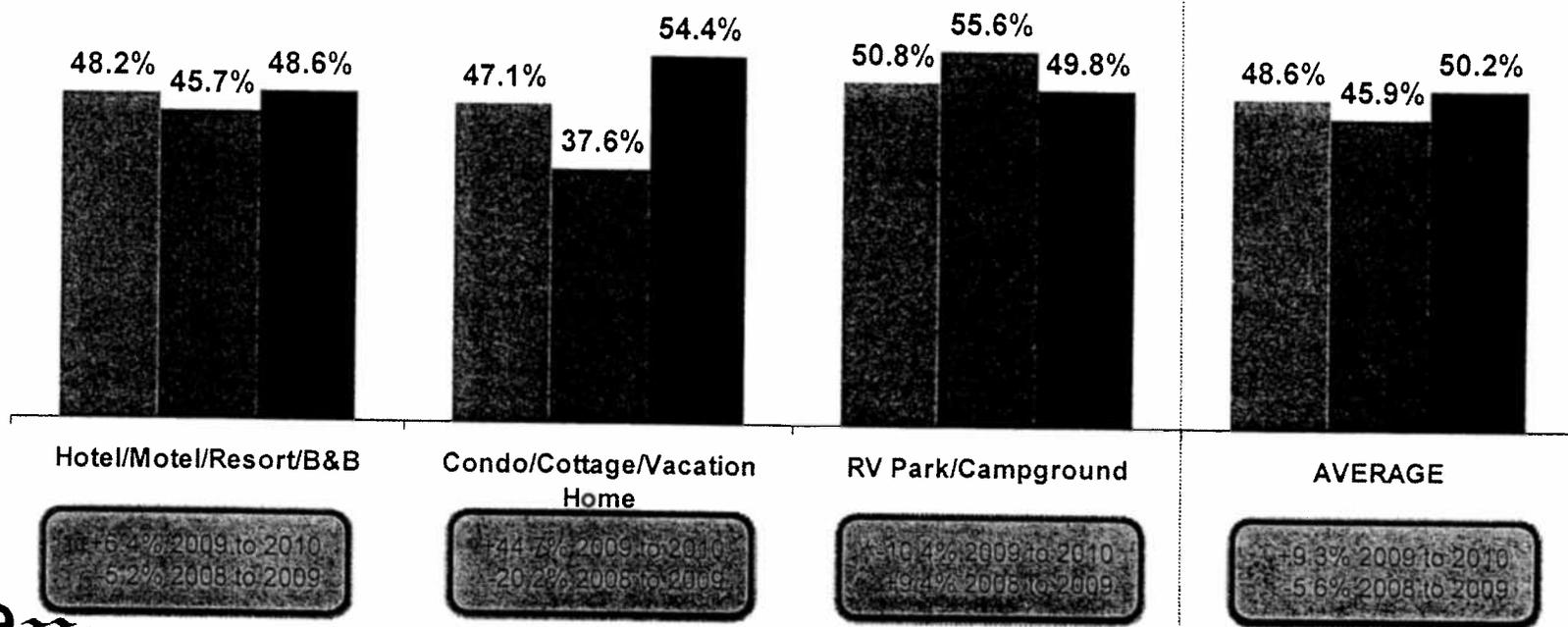
■ November '08 ■ November '09 ■ November '10



Occupancy Rates – November

- Average occupancy rates increased 9.3% from November 2009 to November 2010.
- Occupancy rates for hotels/motels/resorts and condos/cottages experienced an increase. RV parks/campgrounds occupancy rates declined.

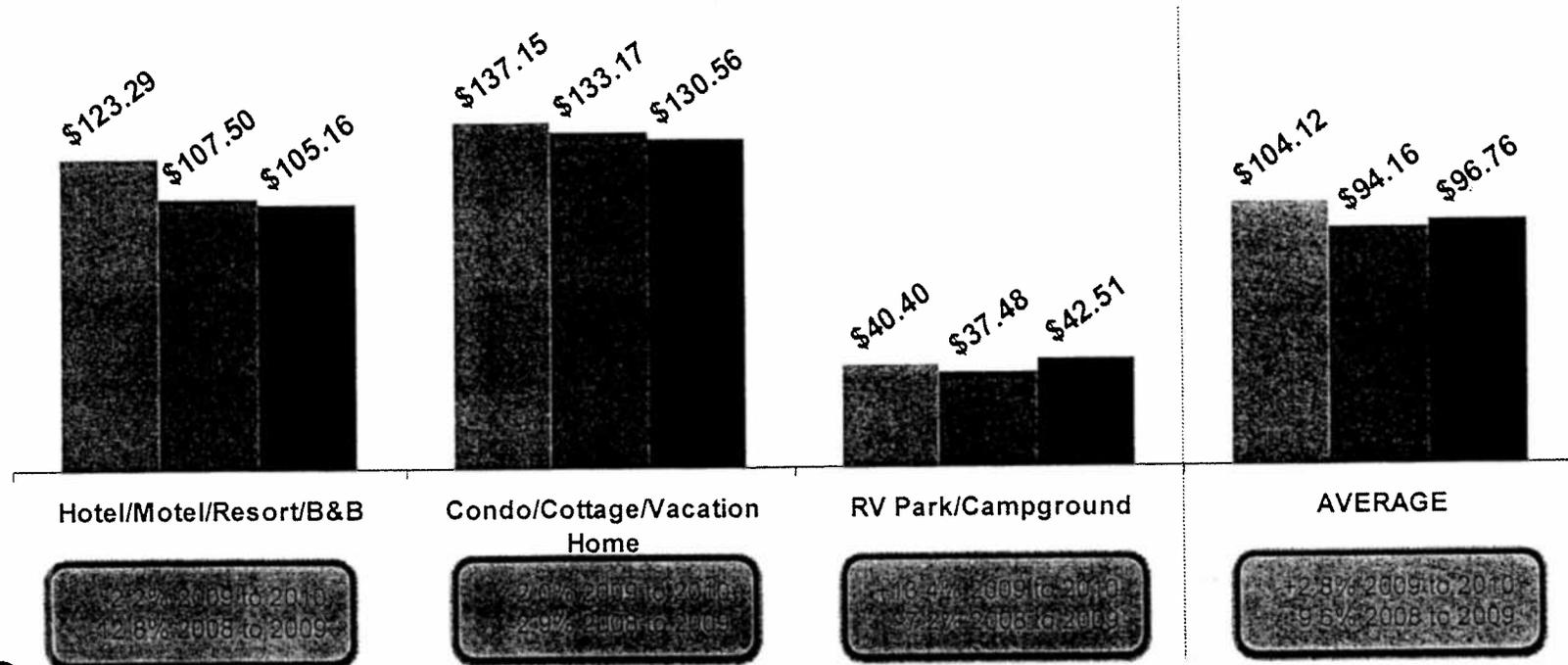
■ November '08 ■ November '09 ■ November '10



Average Daily Rates – November

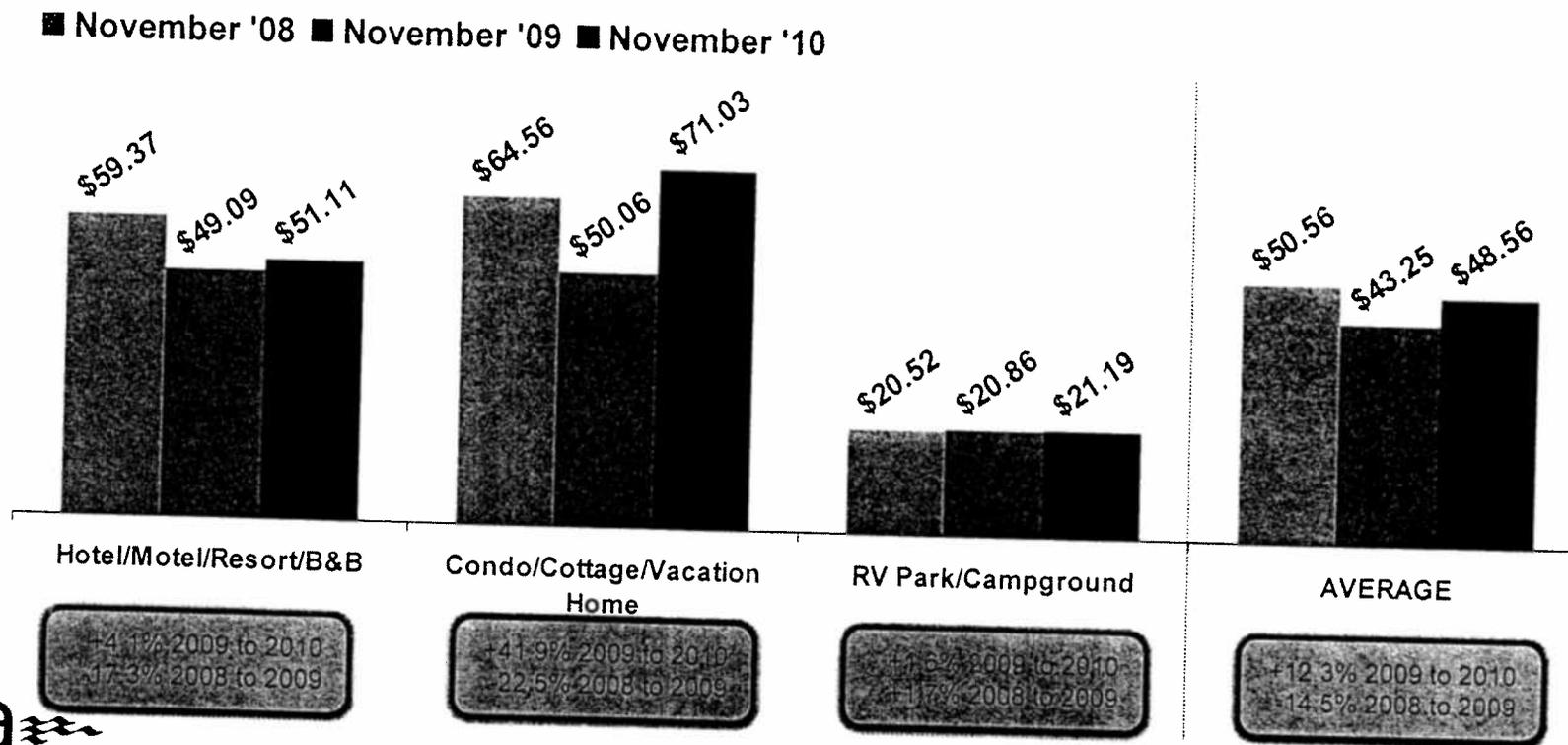
- Overall average daily rates rose from \$94.16 to \$96.76 year-over-year (+2.8%).
- ADR decreases were reported for hotels/motels/resorts and condos/vacation homes. RV parks/campgrounds had an increase in ADR.

■ November '08 ■ November '09 ■ November '10



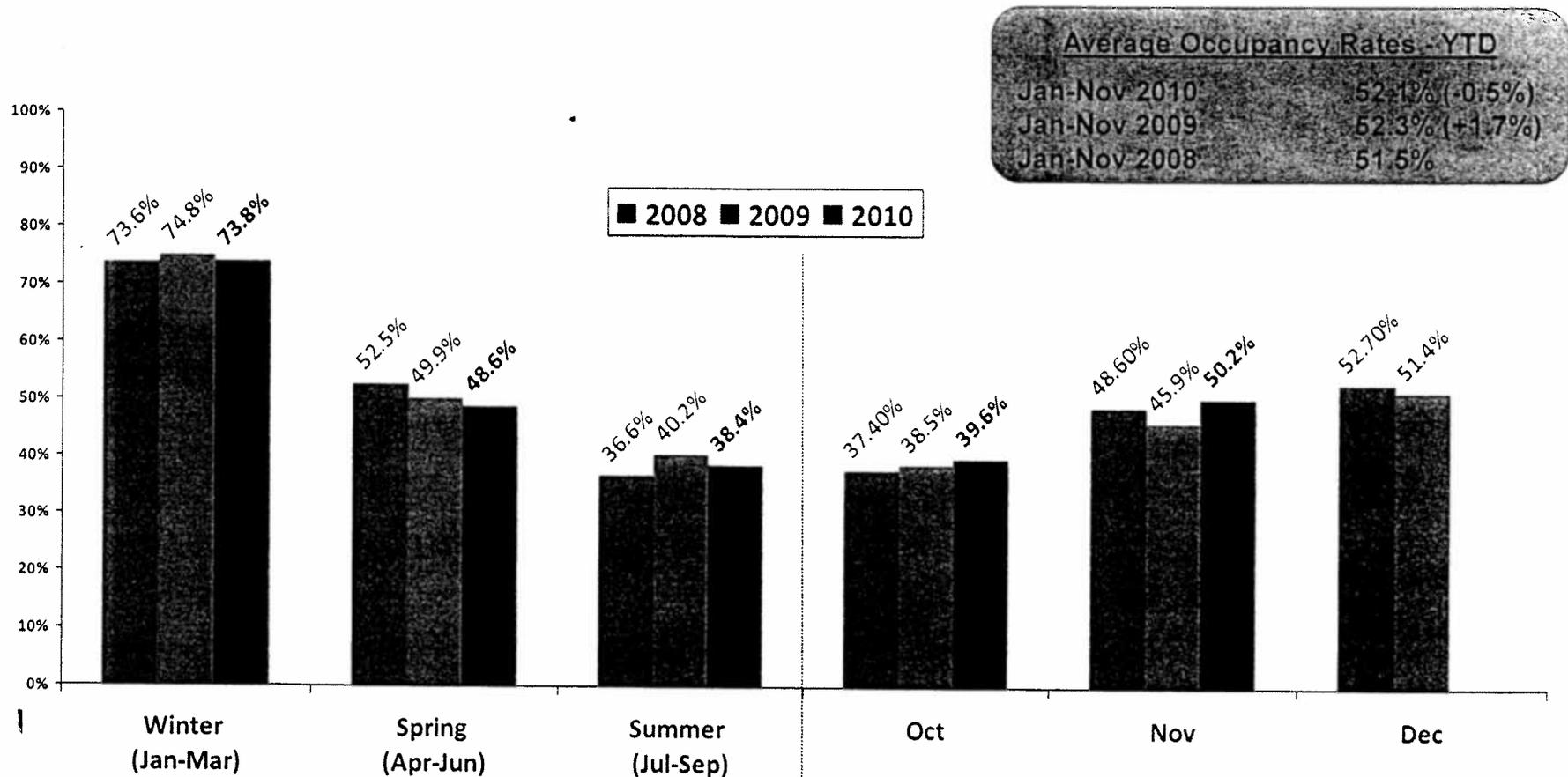
RevPAR – November

- RevPAR was up 12.3% due to the increases in both average occupancy rate and ADR. Gains were seen across all three property categories but most notably for the condo/vacation home properties.



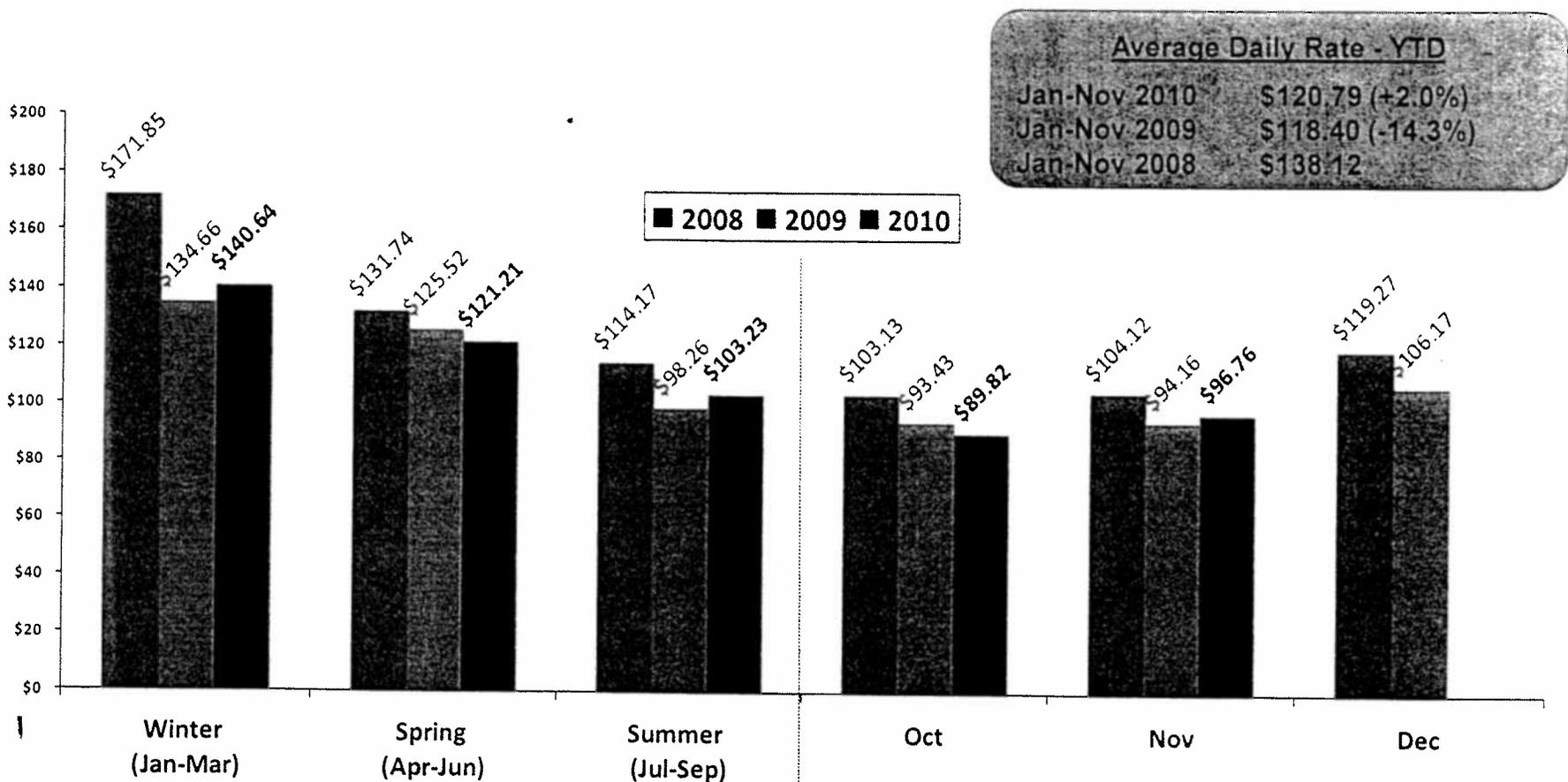
Occupancy Rate Trends: All Property Types Combined

- For calendar YTD 2010, the overall average occupancy rate was unchanged versus the same period in 2009.

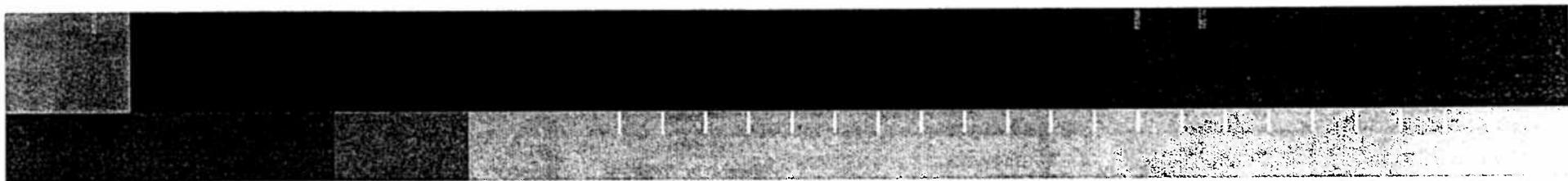


ADR Trends: All Property Types Combined

- The overall average daily rate for calendar YTD 2010 was slightly higher than the same period in 2009.

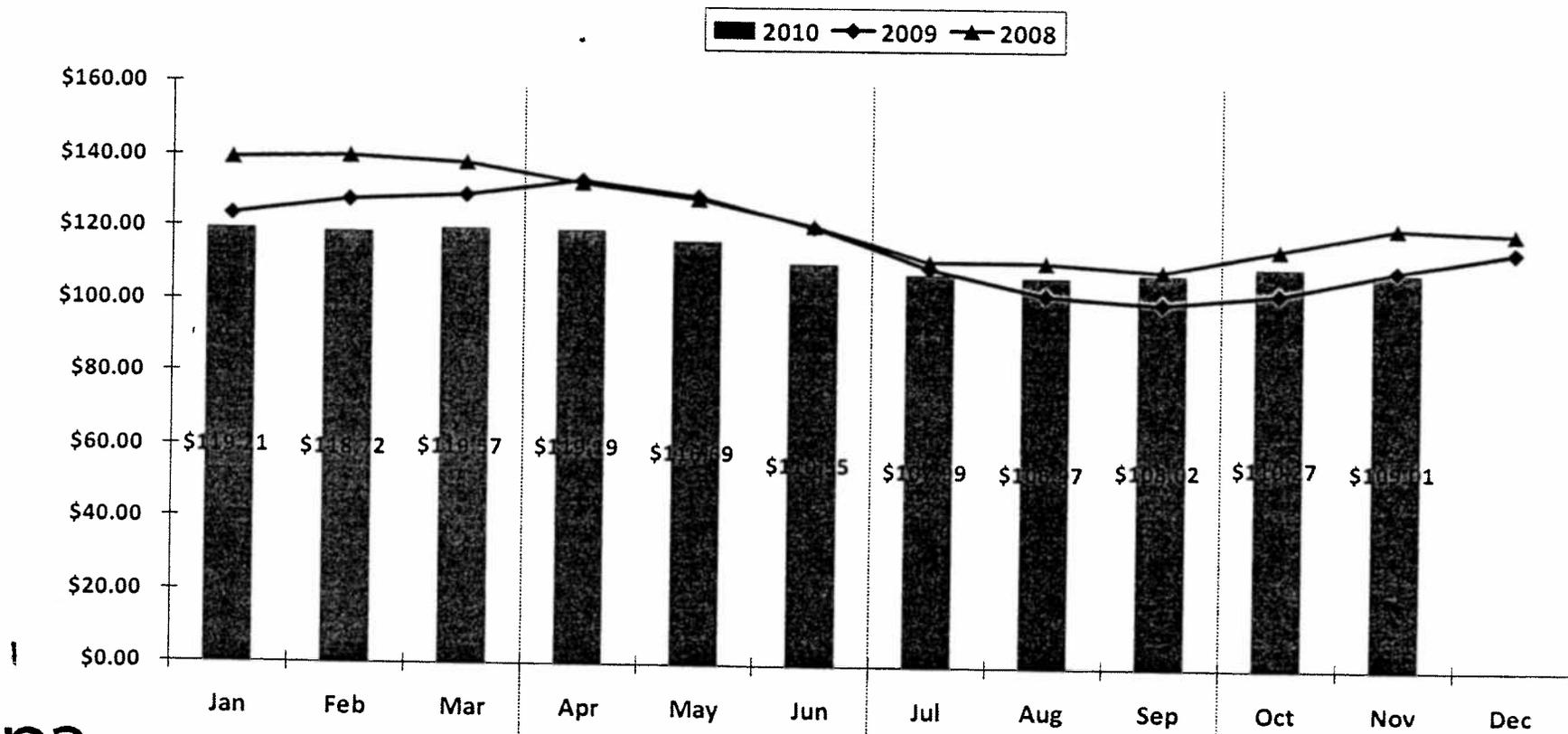


Economic Impact Analysis



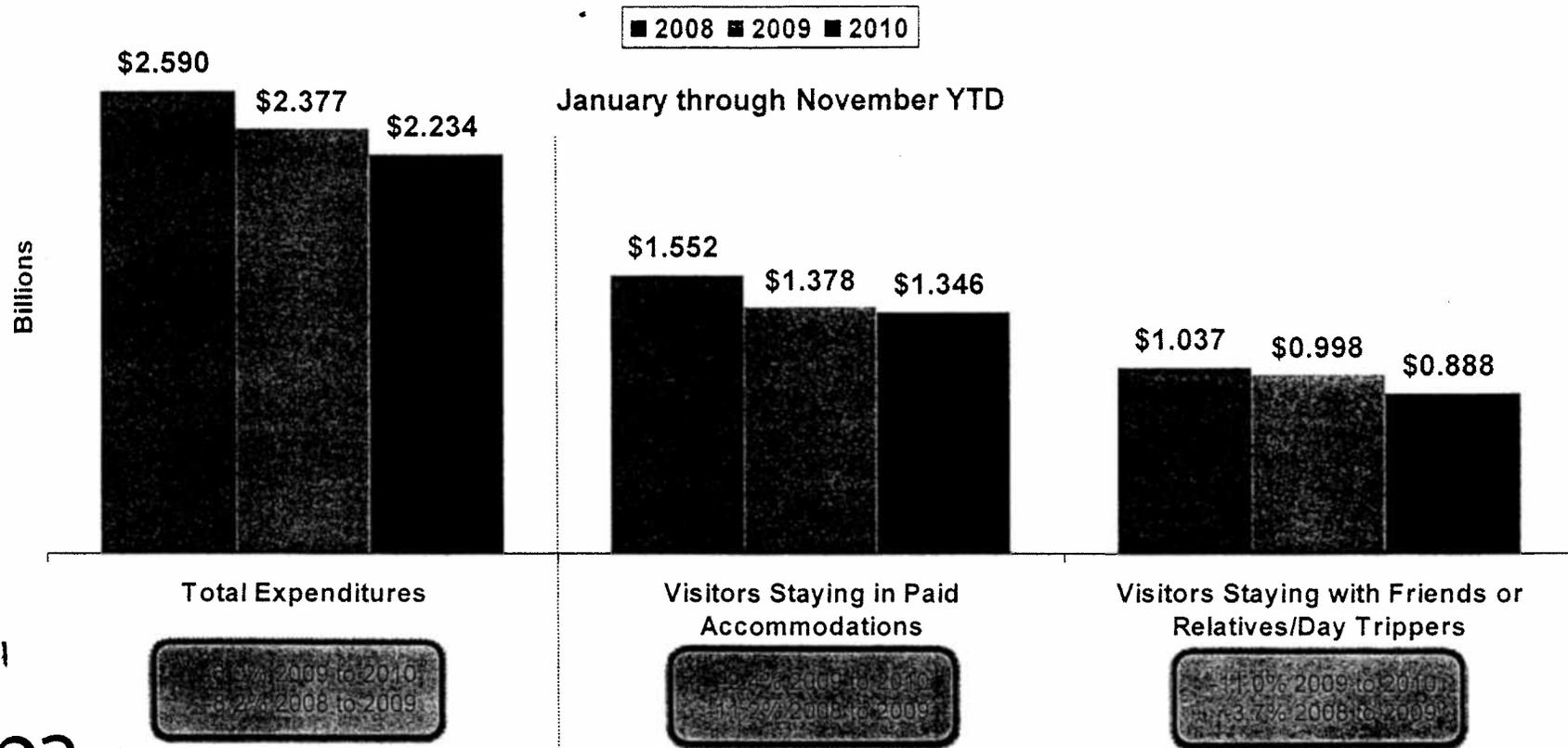
Average Expenditures Per Person Per Day

- The average per person per day expenditure was \$109.01 in November 2010 – on par with November 2009 (\$109.63). The November 2010 average expenditure was about the same as the two months prior.



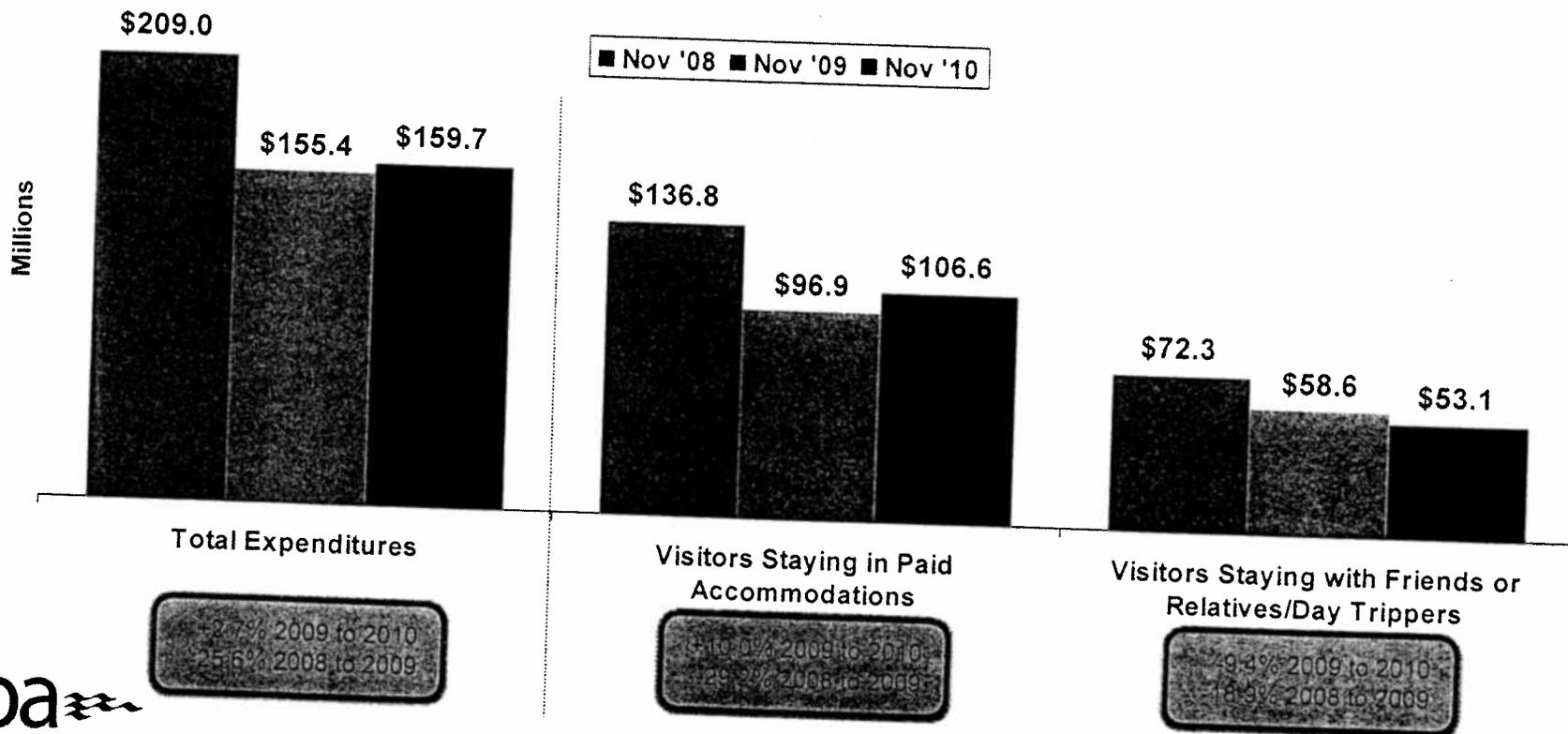
Total Visitor Expenditures – Calendar Year Summary

- For calendar year-to-date 2010, total expenditures were down 6.0% due to a decline in spending among both paid and unpaid accommodations visitors (-2.4% and -11.0% respectively).



Total Visitor Expenditures – November

- Total visitor expenditures for November 2010 are estimated at \$159.7 million, a 2.7% increase from November 2009.
- Expenditures among those staying in paid accommodations saw a double-digit percent increase but expenditures among those staying with friends and relatives decreased from November 2009.





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

November 2010 Visitor Profile and Occupancy Analysis
January 14, 2011

Prepared for:

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

Prepared by:





Executive Summary November 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 180,000 visitors staying in paid accommodations during the month of November 2010, and about 169,000 staying with friends or relatives while visiting, for a total of 349,705 visitors.
- Visitation among those staying in paid accommodations increased 11.7% from November 2009 to November 2010. However, visitation decreased among those staying with friends and relatives (-18.2%). As a result, total visitation was down somewhat (-5.1%) year-over-year. For the calendar year, 2010 total visitation numbers were slightly higher year-over-year (+1.9%).
- Three-fourths of November 2010 visitors staying in paid accommodations were U.S. residents (73%). Canada and the UK contributed the largest share of international visitors staying in paid accommodations (15% and 7% respectively) during November 2010. Visitation from Canada tripled compared to November 2009. However, visitation from the UK and, to a greater extent Germany, declined year-over-year.
- Nearly half of domestic visitors staying in paid accommodations during November 2010 were from the Midwest (46%). Far fewer came from the Northeast (21%), South (18%), and West (8%). There was a decrease in paid accommodations visitors from the South versus the prior year. Lee County drew the largest share of domestic paid accommodations visitors from the Chicago DMA (12%) with Philadelphia (8%) and West Palm Beach-Fort Pierce (7%) as a distant second and third.

Visitor Expenditures

- The average per person per day expenditure was \$109.01 in November 2010 – no change from November 2009 (\$109.63). The November 2010 average expenditure was about the same as the two months prior.
- Total visitor expenditures for November 2010 are estimated at \$159.7 million, a 2.7% increase from \$155.4 million in November 2009. From November 2009 to November 2010, expenditures increased 10.0% among those staying in paid accommodations and decreased 9.4% among those staying with friends and relatives. For the calendar year, estimated total expenditures were down 6.0% – the effect of a 2.4% decrease in spending among paid accommodations guests and an 11.0% drop among unpaid accommodations visitors.



	2009	2010	2009	2010	% Change
Paid Accommodations	44%	52%	161,644	180,481	11.7%
Friends/Relatives	56%	48%	206,829	169,224	-18.2%
Total Visitation			368,473	349,705	-5.1%
U.S. Regions (Paid Accommodations)					
United States	75%	73%	120,705	131,890	9.3%
Canada	6%	15%	9,615	27,766	188.8%
UK	9%	7%	14,663	12,148	-17.2%
Scandinavia	-	2%	-	3,471	--
Germany	7%	1%	11,767	1,735	-85.3%
Switzerland	1%	1%	1,298	1,735	33.7%
BeNeLux	1%	-	2,297	-	-
Austria	1%	-	1,298	-	-
Other	-	1%	-	1,735	-
U.S. Regions (Paid Accommodations)					
	2009	2010	2009	2010	% Change
Florida	10%	11%	12,158	13,883	14.2%
South (including Florida)	28%	18%	33,750	24,296	-28.0%
Midwest	42%	46%	51,191	60,739	18.7%
Northeast	24%	21%	28,810	27,766	-3.6%
West	3%	8%	3,595	10,412	189.6%
No Answer	3%	7%	3,359	8,677	158.3%

Chicago	12%	15,580
Philadelphia	8%	10,438
West Palm Beach-Fort Pierce	7%	9,163
Denver	6%	8,493
Grand Rapids-Kalamazoo-Battle Creek	5%	6,756
Cleveland-Akron (Canton)	4%	5,237
Detroit	4%	5,237
Cincinnati	4%	5,236
Columbus, OH	4%	5,106
Minneapolis-Saint Paul	4%	5,106



Trip Planning

- Six in ten November 2010 visitors started talking about their trip three or more months prior (62%), and slightly fewer said they chose Lee County in that same timeframe (55%).
- November 2010 visitors were most likely to say *warm weather* (84%), *peaceful/relaxing* (80%), and *white sandy beaches* (75%) influenced their selection of Lee County as a destination. There are several attributes for which the proportion of November 2010 visitors saying it strongly influenced their decision to visit was lower than the prior year: *warm weather*, *peaceful/relaxing*, *white sandy beaches*, *safe destination*, *clean environment*, *reasonably priced lodging*, and *upscale accommodations*. However, with the exception of *peaceful/relaxing*, each of the other attributes had experienced an increase in ratings from November 2008 to November 2009.

Visitor Profile

- Three-quarters of Lee County visitors in November 2010 were repeat visitors (78%) – the same as last year (79%). November 2010 visitors' trip length was comparatively shorter than November 2009 visitors. The average number of *days away from home* (11.6 vs. 10.1), *days in Florida* (11.0 vs. 9.6) and *days in Lee County* (9.3 vs. 7.9) were all significantly lower than what November 2009 visitors reported.
- Taking day trips to other areas was more prevalent among November 2010 visitors than among November 2009 (52% vs. 35%); primarily in trips to Naples (31% vs. 20%).
- One-third of November 2010 visitors interviewed indicated they were staying in a hotel/motel/resort/B&B for their lodging (34%), about one-quarter in a condo/vacation home (27%), and one-third at the home of a friend or family member (33%). Slightly fewer than half felt that the quality of accommodations far exceeded or exceeded their expectations (49%) in November 2010.
- The top activities enjoyed while in Lee County during November 2010 were *beaches*, *relaxing*, *dining out and shopping*. November 2010 visitors were more likely to *visit friends and relatives* (43% vs. 30% November 2009) and go *sightseeing* (40% vs. 26% November 2009) than those in November 2009.
- Overall, visitor satisfaction remains extremely high, with 95% of November 2010 visitors reporting being very satisfied or satisfied. The vast majority indicated they were likely to return to Lee County (91%), and well over half of them are likely to return next year (60%).



- When asked what they liked least about the Lee County area, *traffic* ranked as the number one dislike among November 2010 visitors (31%) – a higher level than among November 2009 visitors (18%). However, the proportion who found *insects* (8%) and *red tide* (4%) to be objectionable was lower than reports from November 2009 visitors (20% and 10%, respectively).
- The demographic composition of November 2010 visitors was generally similar to that of November 2009 visitors. November 2010 visitors averaged 54 years of age with an average household income of nearly \$97,000. The majority of visitors are married (73%) but only half say they were traveling as a couple (47%). The average travel party size was 2.8 people.



Lodging Property Manager Assessments

- For the Lee County lodging industry in total, the number of *available* room nights decreased but *occupied* room nights were higher in November 2010 than in November 2009 (-1.8 and +7.3% respectively). Hotel/motel/resort *available* room nights were down 3.7% from a year ago and *occupied* room nights were up 2.5%. Condo/vacation home properties showed a similar pattern with a 5.5% decline in *available* room-nights and a substantial increase in *occupied* room nights (+36.7%). In contrast, RV park/campground properties saw an increase in *available* room nights and a 4.2% decrease in *occupied* room nights.

Property Type	2009 Available	2010 Available	% Change	2009 Occupied	2010 Occupied	% Change
Hotel/Motel/Resort/B&B	163,907	167,950	2.5%	358,923	345,566	-3.7%
Condo/Cottage/Vacation Home	56,810	77,684	36.7%	151,122	142,800	-5.5%
RV Park/Campground	77,654	74,405	-4.2%	139,560	149,280	7.0%
Total	298,371	320,039	7.3%	649,605	637,646	-1.8%

- Average occupancy rates increased from 45.9% in November 2009 to an average of 50.2% in November 2010 (+9.3%). Occupancy rates increased for hotel/motel/resorts (+6.4%) and more substantially for condo/vacation home properties (+44.7%) year-over-year. RV park/campgrounds saw a 10.4% occupancy decrease from a year ago.
- Overall average daily rates rose from \$94.16 to \$96.76 year-over-year (+2.8%). ADR decreased slightly for hotel/motel/resort and condo/vacation home properties but increased for RV park/campgrounds.
- RevPAR was up 12.3% from November 2009 driven by increases observed in each property category but most notably for condo/vacation home properties (+41.9%).

Property Manager's Responsibility	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2009	2010	% Change	2009	2010	% Change	2009	2010	% Change
Hotel/Motel/Resort/B&B	45.7%	48.6%	6.4%	\$107.50	\$105.16	-2.2%	\$49.09	\$51.11	4.1%
Condo/Cottage/Vacation Home	37.6%	54.4%	44.7%	\$133.17	\$130.56	-2.0%	\$50.06	\$71.03	41.9%
RV Park/Campground	55.6%	49.8%	-10.4%	\$37.48	\$42.51	13.4%	\$20.86	\$21.19	1.6%
AVERAGE	45.9%	50.2%	9.3%	\$94.16	\$96.76	2.8%	\$43.25	\$48.56	12.3%



- When comparing their current month's occupancy and revenue year-over-year, property managers' assessments about performance were fairly consistent in November 2010 with reports in November 2009. Well over half indicated that their November 2010 occupancy was the same or better than the prior year (60% vs. 51% November 2009). Similarly, half reported their revenue was the same or better than the prior year (53% vs. 47% November 2009).
- Projections for the next three months (December 2010 – February 2011) were slightly more optimistic than those made in November 2009. Half of property managers in November 2010 reported that their total level of reservations for the next three months are the same or better than the same period the prior year (53%), while slightly less than half (42%) reported the same in November 2009.
- Property managers were also queried about the impact of the oil spill on their business in terms of cancellations and inquiries.
 - Half of managers don't know how many November room nights were cancelled as a result of the oil spill, and about the same number said that no room nights were cancelled as a result of the oil spill. Only 4% said one or more room nights were cancelled.
 - A large minority (42%) of property managers said they had some/many fewer inquiries during November 2010 than they had at the same time last year, and two-thirds of them (71%) attribute the decline in inquiries to the economic downturn with another 15% citing the BP oil spill as a factor.



November 2010 Lee County Snapshot

November 2010				
	2010	2009	2010	2009
Paid Accommodations	44%	52%	161,644	180,481
Friends/Relatives	56%	48%	206,829	169,224
Total Visitation			368,473	349,705
By Country				
Florida	10%	11%	12,158	13,883
United States	75%	73%	120,705	131,890
Canada	6%	15%	9,615	27,766
UK	9%	7%	14,663	12,148
Scandinavia	-	2%	-	3,471
Germany	7%	1%	11,767	1,735
Switzerland	1%	1%	1,298	1,735
BeNeLux	1%	-	2,297	-
Austria	1%	-	1,298	-
Other	-	1%	-	1,735

Total Visitor Expenditures			
	2010	2009	% Change
Total Visitor Expenditures	\$155,446,477	\$159,679,286	2.7%
Paid Accommodations	\$96,854,719	\$106,581,120	10.0%

Average Expenditure Per Day Expenditures		
	2010	2009
Average	\$109.63	\$109.01
		-0.6%

First-time/Repeat Visitors to Lee County		
	2010	2009
First-time	21%	21%
Repeat	79%	78%

Average Expenditure Per Day Expenditures									
	2010	2009	% Change	2010	2009	% Change	2010	2009	% Change
Hotel/Motel/Resort/B&B	45.7%	48.6%	6.4%	\$107.50	\$105.16	-2.2%	\$49.09	\$51.11	4.1%
Condo/Cottage/Vacation Home	37.6%	54.4%	44.7%	\$133.17	\$130.56	-2.0%	\$50.06	\$71.03	41.9%
RV Park/Campground	55.6%	49.8%	-10.4%	\$37.48	\$42.51	13.4%	\$20.86	\$21.19	1.6%
AVERAGE	45.9%	50.2%	9.3%	\$94.16	\$96.76	2.8%	\$43.25	\$48.56	12.3%



Total Calendar YTD Visitation				
	%		Visitor Estimates	
	2009	2010	2009	2010
Paid Accommodations	48%	49%	2,051,734	2,153,460
Friends/Relatives	52%	51%	2,263,633	2,244,962
Total Visitation			4,315,367	4,398,422
Visitor Origin - Visitors Staying in Paid Accommodations				
	%		Visitor Estimates	
	2009	2010	2009	2010
Florida	13%	15%	206,774	253,185
United States	78%	79%	1,602,167	1,708,300
Germany	7%	6%	137,405	126,592
Canada	5%	5%	98,718	108,508
UK	5%	5%	94,716	104,334
BeNeLux	2%	2%	34,685	31,996
Scandinavia	1%	1%	22,678	19,476
Switzerland	1%	1%	18,676	13,911
France	1%	1%	20,010	11,129
Austria	<1%	<1%	5,336	8,347
Ireland	1%	<1%	10,672	8,347
Latin America	-	<1%	-	2,782
Other	<1%	<1%	6,670	9,738

Total Visitor Expenditures			
	2009	2010	% Change
Total Visitor Expenditures	\$2,376,546,957	\$2,233,866,253	-6.0%
Paid Accommodations	\$1,378,110,715	\$1,345,649,659	-2.4%

Average Per Person Per Day Expenditures		
2009	2010	% Change
\$120.37	\$117.63	-2.3%

First-Time/Repeat Visitors to Lee County		
	2009	2010
First-time	27%	25%
Repeat	71%	74%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2009	2010	% Change	2009	2010	% Change	2009	2010	% Change
Property Managers Responding									
Hotel/Motel/Resort/B&B	52.9%	52.5%	-0.6%	\$126.72	\$127.64	0.7%	\$66.98	\$67.05	0.1%
Condo/Cottage/Vacation Home	52.8%	53.4%	1.1%	\$166.79	\$169.02	1.3%	\$88.07	\$90.22	2.4%
RV Park/Campground	50.6%	49.4%	-2.4%	\$44.03	\$45.29	2.9%	\$22.26	\$22.36	0.4%
AVERAGE	52.3%	52.1%	-0.5%	\$118.40	\$120.79	2.0%	\$61.95	\$62.87	1.5%



Visitor Profile Analysis November 2010

A total of 201 interviews were conducted with visitors in Lee County during the month of November 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 207 interviews were conducted with visitors in Lee County during the month of November 2009. 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



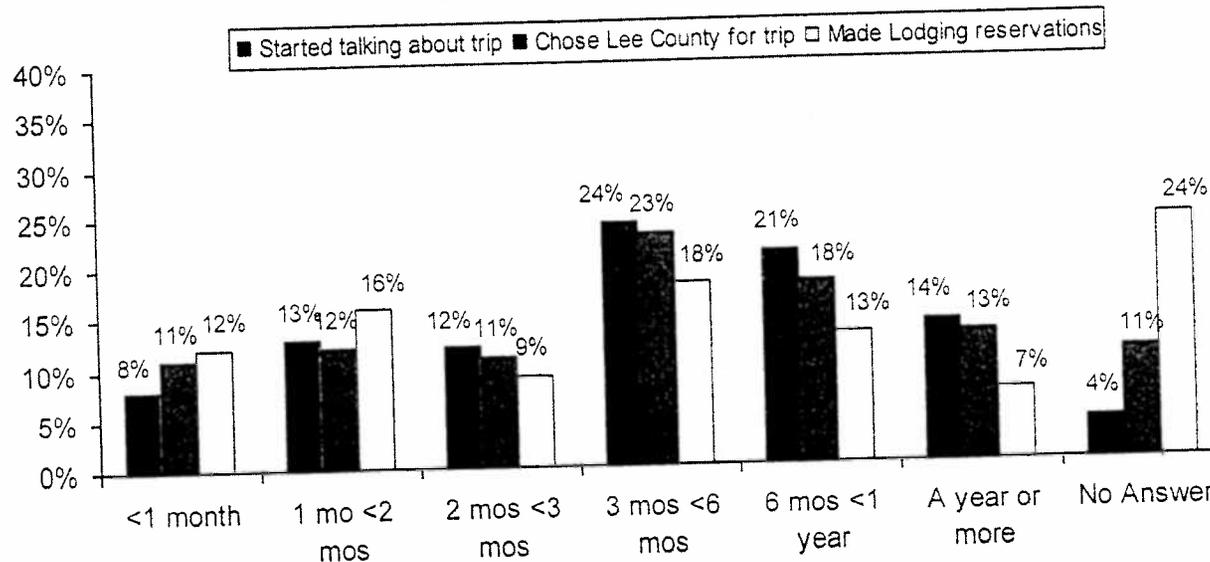
<1 month	5%	8%	7%	11%	10%	12%
1 mo - < 2 mos	9%	13%	10%	12%	15%	16%
2 mos - < 3 mos	9%	12%	10%	11%	9%	9%
3 mos - < 6 mos	30%	24%	23%	23%	24%	18%
6 mos - <1 year	27%	21%	24%	18%	18%	13%
A year or more	16%	17%	18%	13%	12%	7%
No answer	4%	4%	7%	11%	13%	<24%>

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?

November 2010 Travel Planning



November 2010



Before leaving home	89%	88%
After arriving in Florida	6%	10%
On the road, but not in Florida	1%	1%
No Answer	3%	1%

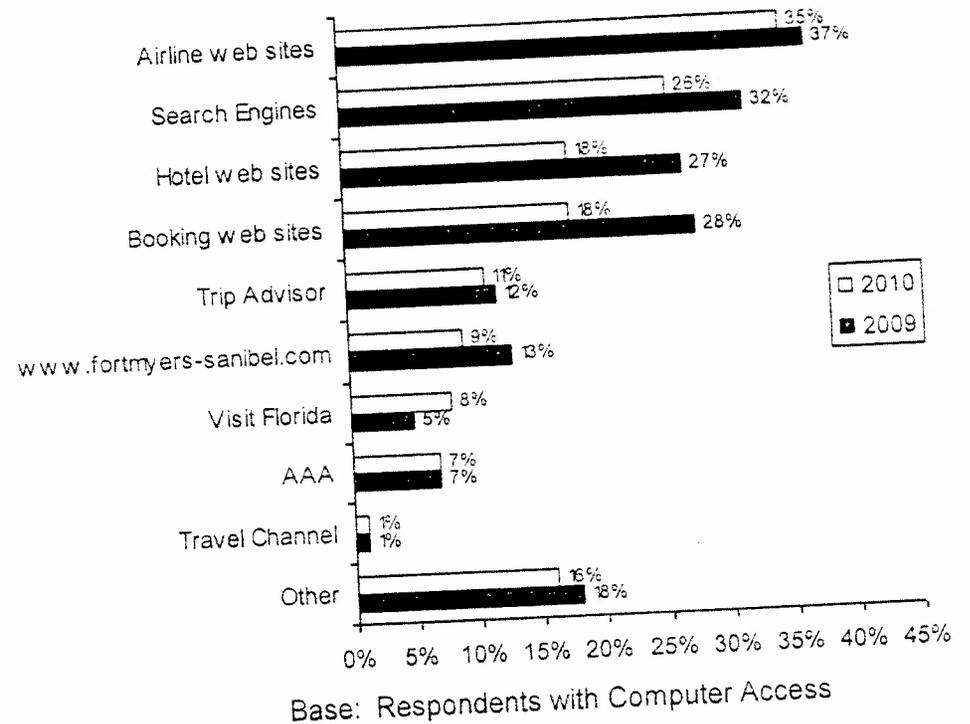
Q6: Did you make accommodation reservations for your stay in Lee County?



	2010	2009
<u>Visited web sites (net)</u>	<u>80%</u>	<u>73%</u>
Airline web sites	37%	35%
Search Engines	32%	26%
Hotel web sites	<27%>	18%
Booking web sites	<28%>	18%
Trip Advisor	12%	11%
www.fortmyers-sanibel.com	13%	9%
Visit Florida	5%	8%
AAA	7%	7%
Travel Channel	1%	1%
Other	18%	16%
<u>Did not visit web sites</u>	<u>16%</u>	<u>21%</u>
No Answer	4%	6%

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

Travel Web Sites Visited

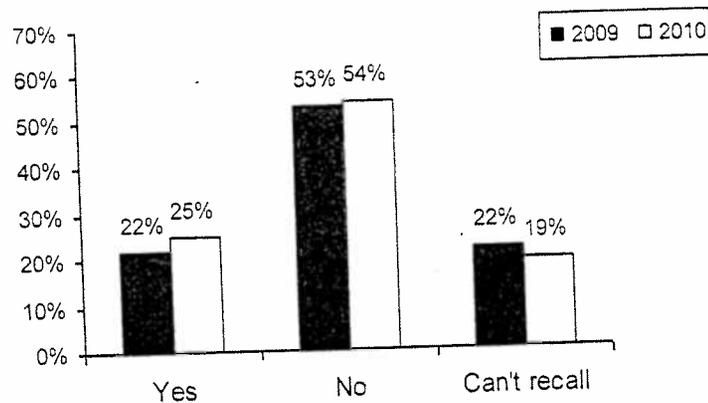




Requested information (net)	32%	24%
Hotel Web Site	17%	11%
Call hotel	9%	6%
VCB Web Site	4%	4%
Visitor Guide	4%	3%
Clipping/ mailing coupon	1%	1%
Call local Chamber of Commerce	1%	1%
Call VCB	1%	1%
Other	10%	8%
Did not request information	56%	63%
No Answer	12%	13%

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

Recall of Promotions



November 2010

Yes	4%	5%
No	96%	94%

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

Yes	22%	25%
No	53%	54%
Can't recall	22%	19%

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

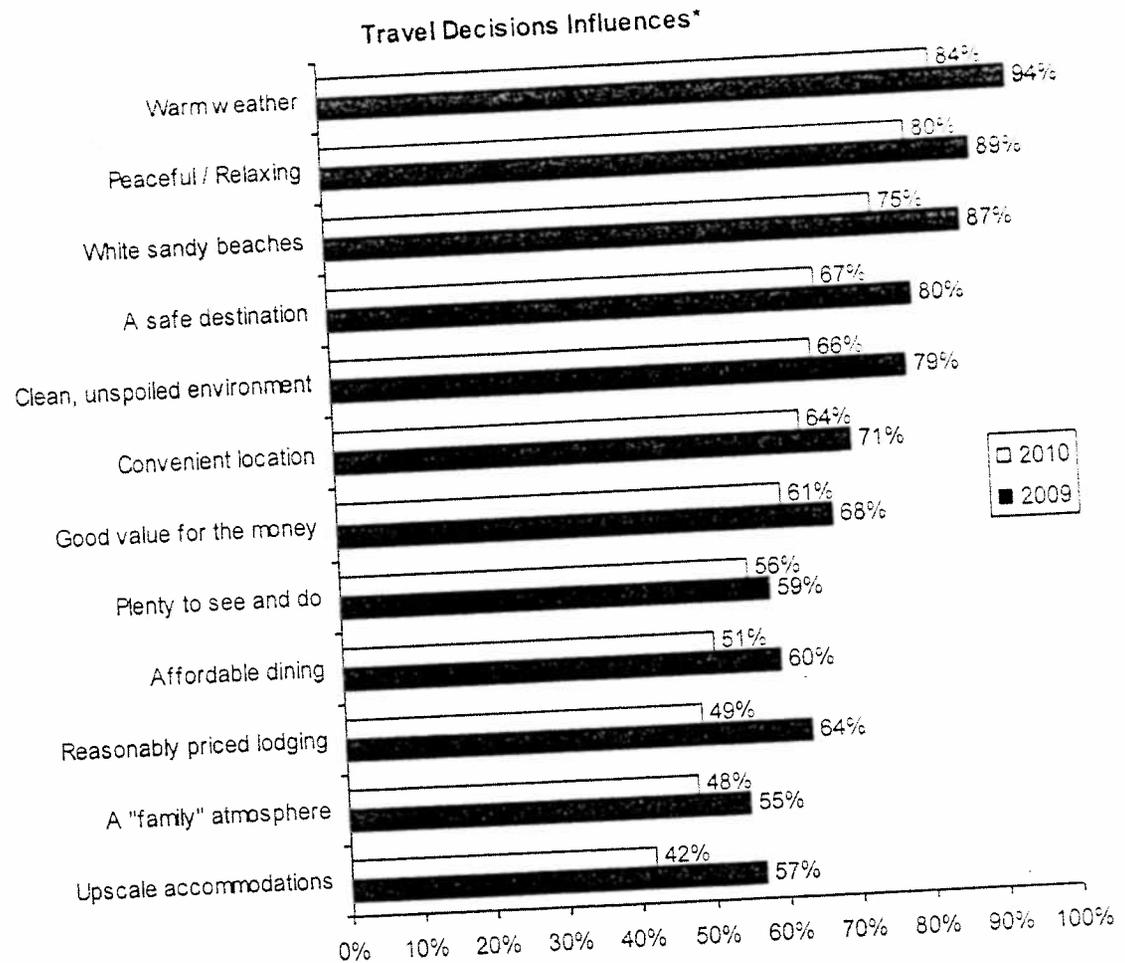
Travel Planning



November Travel Decision Influences		
Influence	2010	2009
Warm weather	<94%>	84%
Peaceful / Relaxing	<89%>	80%
White sandy beaches	<87%>	75%
A safe destination	<80%>	67%
Clean, unspoiled environment	<79%>	66%
Convenient location	71%	64%
Good value for the money	68%	61%
Plenty to see and do	59%	56%
Affordable dining	60%	51%
Reasonably priced lodging	<64%>	49%
A "family" atmosphere	55%	48%
Upscale accommodations	<57%>	42%

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)



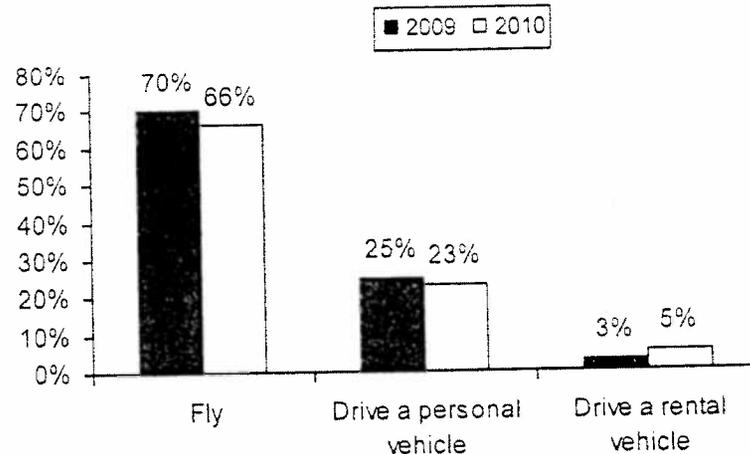


Trip Profile

	2009	2010
Fly	70%	66%
Drive a personal vehicle	25%	23%
Drive a rental vehicle	3%	5%
Drive an RV	1%	<4%>
Travel by bus	-	3%
Other/No Answer (net)	1%	-

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

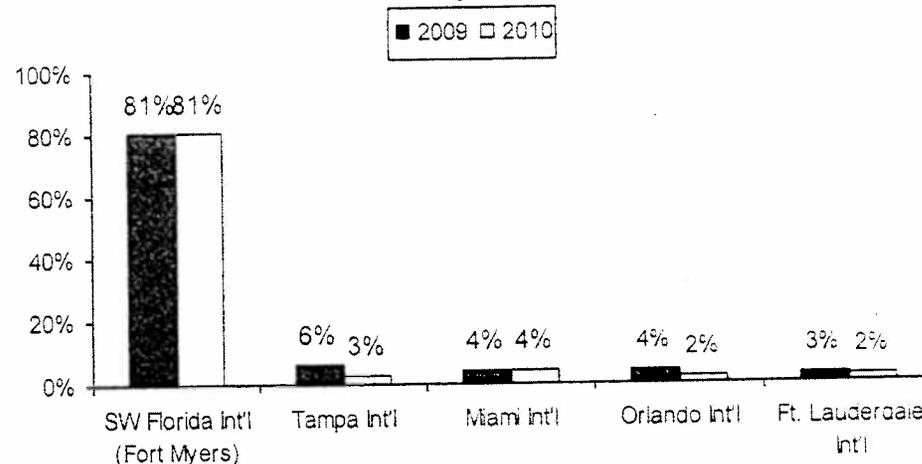
Mode of Transportation



Airport	2009	2010
Total Responses who arrived by air		
SW Florida Int'l (Fort Myers)	81%	81%
Tampa Int'l	6%	3%
Miami Int'l	4%	4%
Orlando Int'l	4%	2%
Ft. Lauderdale Int'l	3%	2%
West Palm Beach Int'l	-	2%
Sarasota / Bradenton	-	-
Other/No Answer (net)	3%	6%

Q2: At which Florida airport did you land?

Airport

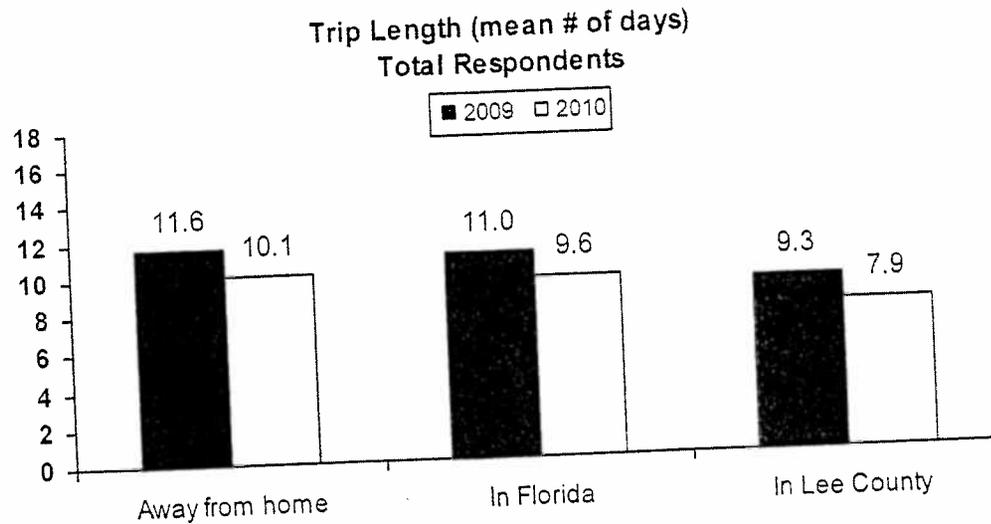


Trip Profile



Away from home	<11.6>	10.1	-12.9%
In Florida	<11.0>	9.6	-12.7%
In Lee County	<9.3>	7.9	-15.1%

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

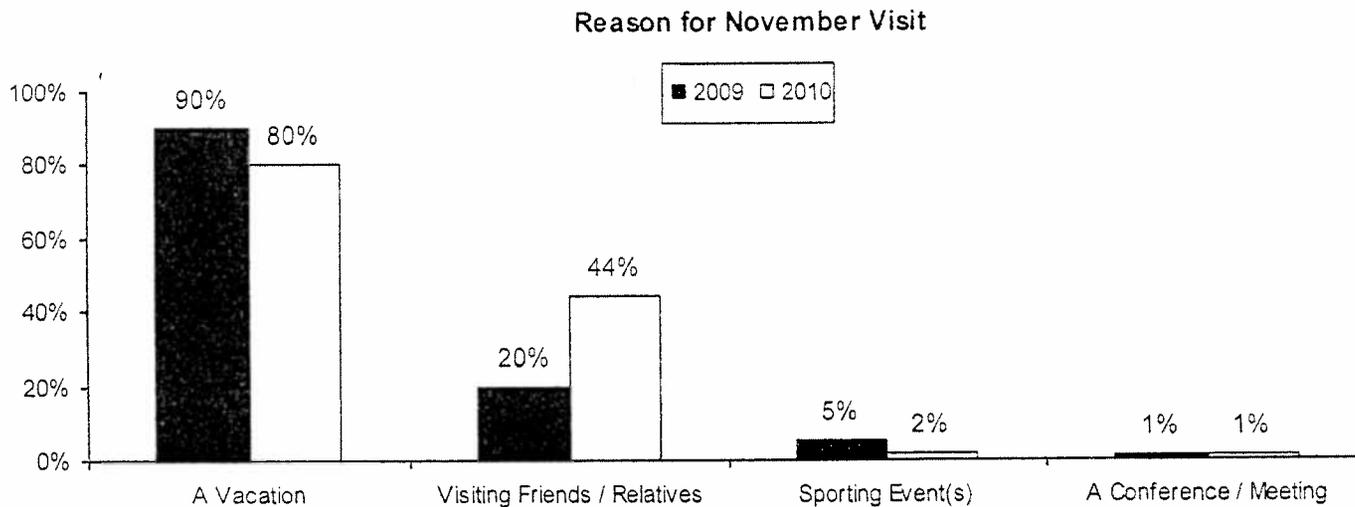


Trip Profile



A Vacation	<90%>	80%
Visiting Friends / Relatives	20%	<44%>
Sporting Event(s)	<5%>	2%
A Conference / Meeting	1%	1%
Other Business Trip	1%	1%
A Convention / Trade Show	-	-
Personal Business	<4%>	<1%>
Other/No Answer	2%	2%

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

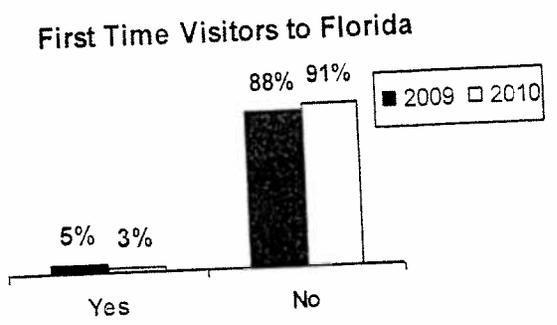
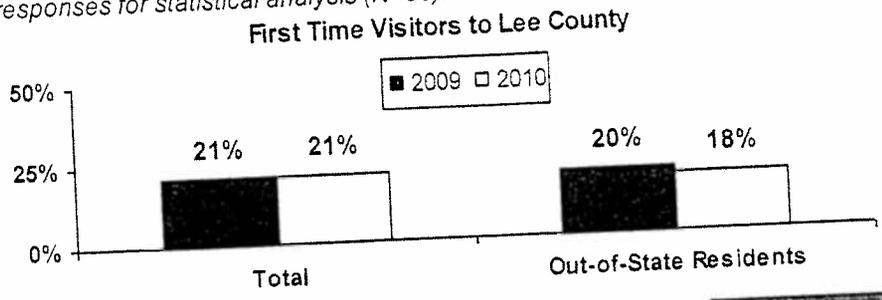


Trip Profile



	2009	2010	N/A	2009	2010	2009	2010
Yes	21%	21%	N/A	N/A	20%	18%	25%
No	79%	78%	N/A	N/A	79%	81%	75%
No Answer	1%	1%	N/A	N/A	1%	1%	-

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

	2009	2010
Yes	5%	3%
No	88%	91%
No answer	1%	1%
FL Residents*	6%	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.

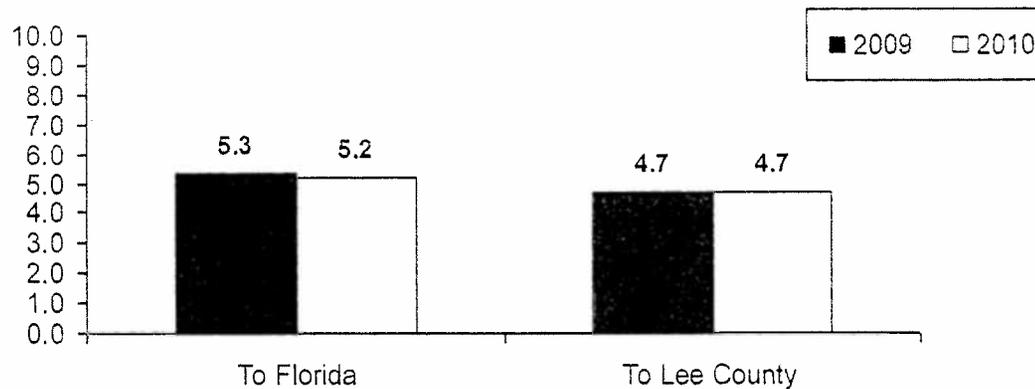
Trip Profile



	PREVIOUS VISITS (FIVE YEARS)			
	Mean of Visits to Florida		Mean of Visits to Lee County	
	2009	2010	2009	2010
Number of visits	5.3	5.2	4.7	4.7

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

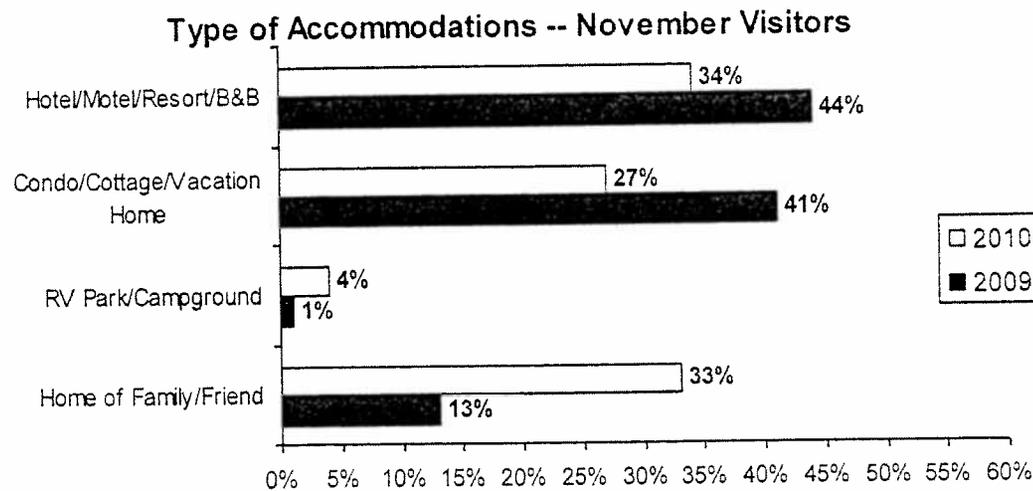


Trip Profile



Hotel/Motel/Resort/B&B	<u><44%></u>	<u>34%</u>
Hotel/motel/inn	27%	26%
Resort	<18%>	7%
B&B	-	<1%>
Condo/Cottage/Vacation Home	<u><41%></u>	<u>27%</u>
Rented home/condo	<23%>	14%
Borrowed home/condo	5%	3%
Owned home/condo	13%	9%
RV Park/Campground	<u>1%</u>	<u><4%></u>
Home of family/friend	13%	<33%>
Day trip (no accommodations)	-	3%

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

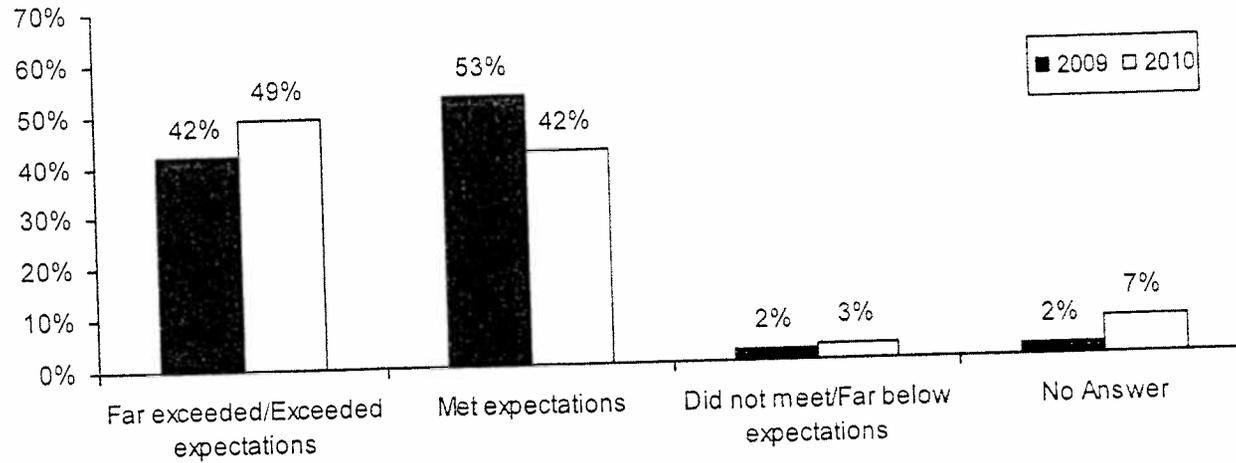




Far exceeded/Exceeded expectations	42%	49%
Met your expectations	<53%>	42%
Did not meet/Far below expectations	2%	3%
No Answer	2%	7%

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

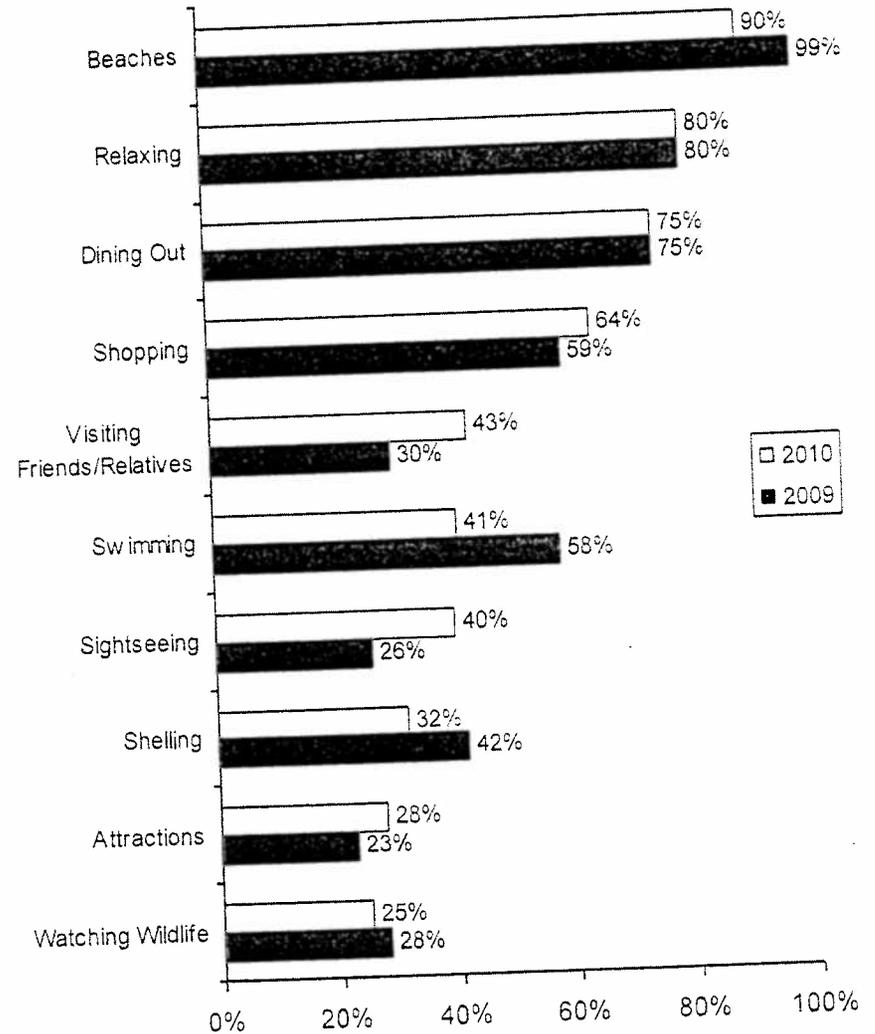
Quality of Accommodations



Trip Activities



Activity	2009	2010
Beaches	<99%>	90%
Relaxing	80%	80%
Dining Out	75%	75%
Shopping	59%	64%
Visiting Friends/Relatives	30%	<43%>
Swimming	<58%>	41%
Sightseeing	26%	<40%>
Shelling	<42%>	32%
Attractions	23%	28%
Watching Wildlife	28%	25%
Photography	21%	22%
Bars / Nightlife	17%	20%
Exercise / Working Out	18%	19%
Birdwatching	18%	17%
Bicycle Riding	17%	11%
Golfing	8%	10%
Miniature Golf	7%	9%
Fishing	11%	9%
Guided Tour	4%	9%
Cultural Events	5%	8%
Boating	9%	8%
Parasailing / Jet Skiing	5%	6%
Sporting Event	5%	3%
Kayaking / Canoeing	4%	3%
Scuba Diving / Snorkeling	2%	2%
Tennis	2%	1%
Other	2%	5%
No Answer	-	0%



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

November 2010

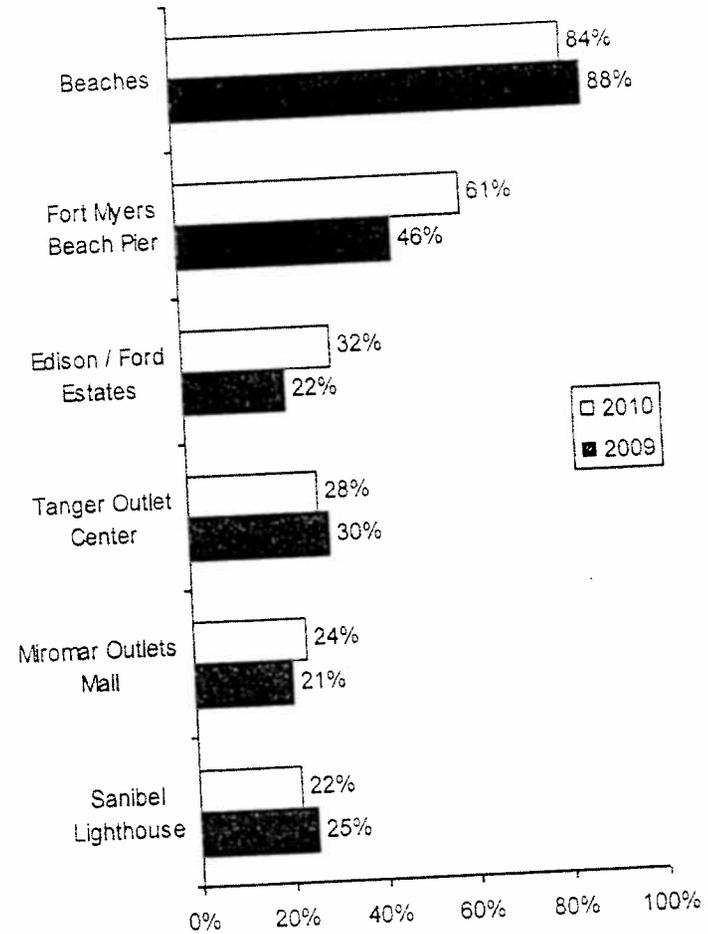
Trip Activities



Attraction	2010	2009
Beaches	88%	84%
Fort Myers Beach Pier	46%	<61%>
Edison / Ford Estates	22%	<32%>
Tanger Outlet Center	30%	28%
Miromar Outlets Mall	21%	24%
Sanibel Lighthouse	25%	22%
Bell Tower Shops	16%	19%
Ding Darling National Wildlife Refuge	18%	14%
Edison Mall	11%	12%
Coconut Point Mall	6%	11%
Manatee Park	3%	<11%>
Gulf Coast Town Center	7%	10%
Shell Factory and Nature Park	8%	8%
Periwinkle Place	<15%>	7%
Barbara B. Mann Performing Arts Hall	1%	<4%>
Broadway Palm Dinner Theater	1%	3%
Bailey-Matthews Shell Museum	2%	1%
Babcock Wilderness Adventures	2%	-
Other	6%	10%
None/No Answer	3%	3%

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

November Attractions Visited

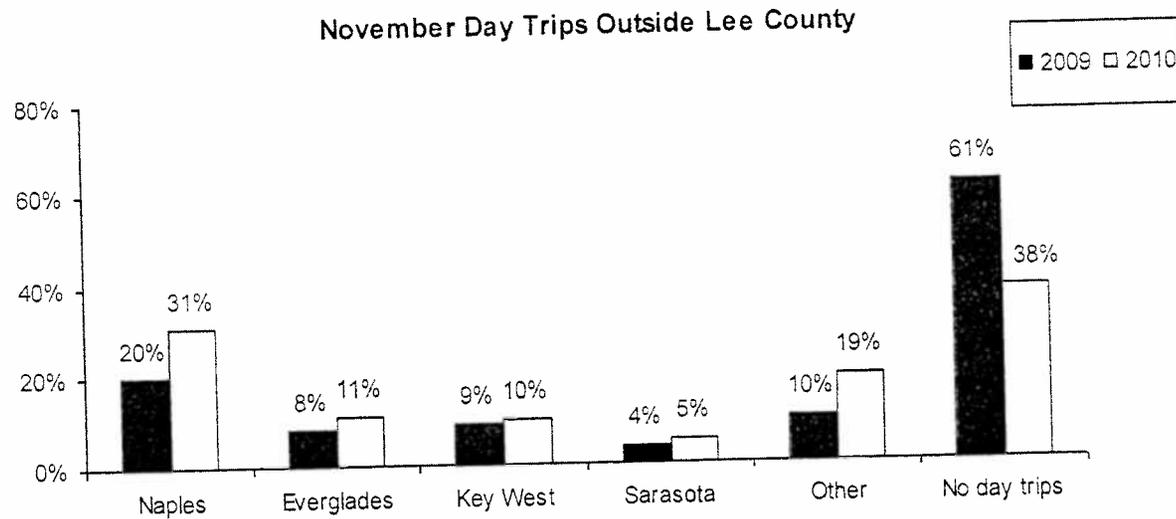


Trip Activities

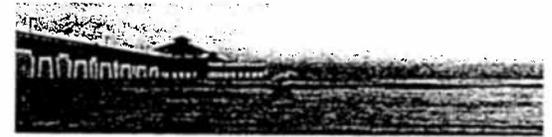


	2009	2010
Any day trips (net)	35%	<52%>
<i>Naples</i>	20%	<31%>
<i>Everglades</i>	8%	11%
<i>Key West</i>	9%	10%
<i>Sarasota</i>	4%	5%
<i>Other</i>	10%	<19%>
No day trips	<61%>	38%
No Answer	4%	10%

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

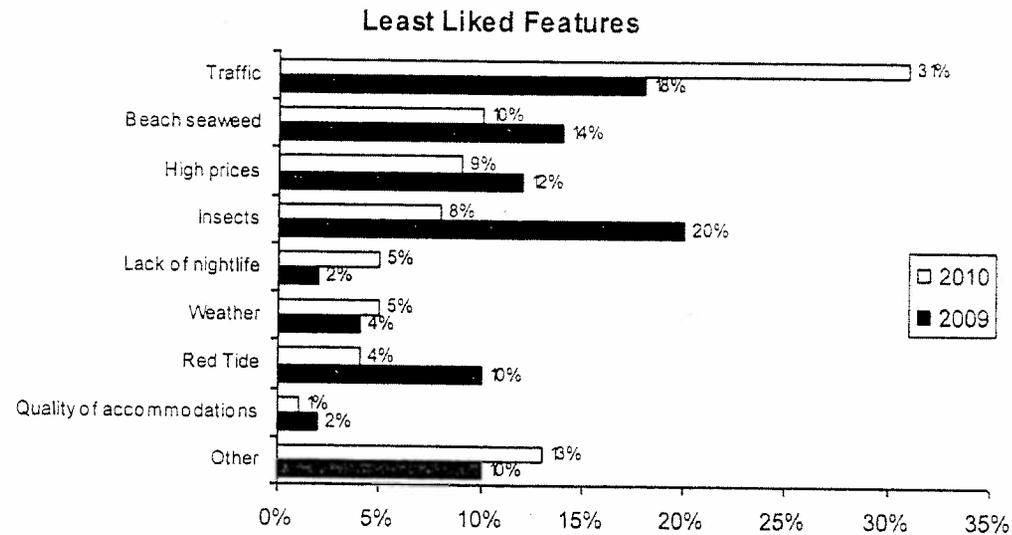


Trip Activities



Traffic	18%	<31%>
Beach seaweed	14%	10%
High prices	12%	9%
Insects	<20%>	8%
Lack of nightlife	2%	5%
Weather	4%	5%
Red Tide	<10%>	4%
Quality of accommodations	2%	1%
Other	10%	13%
Nothing/No Answer	39%	39%

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

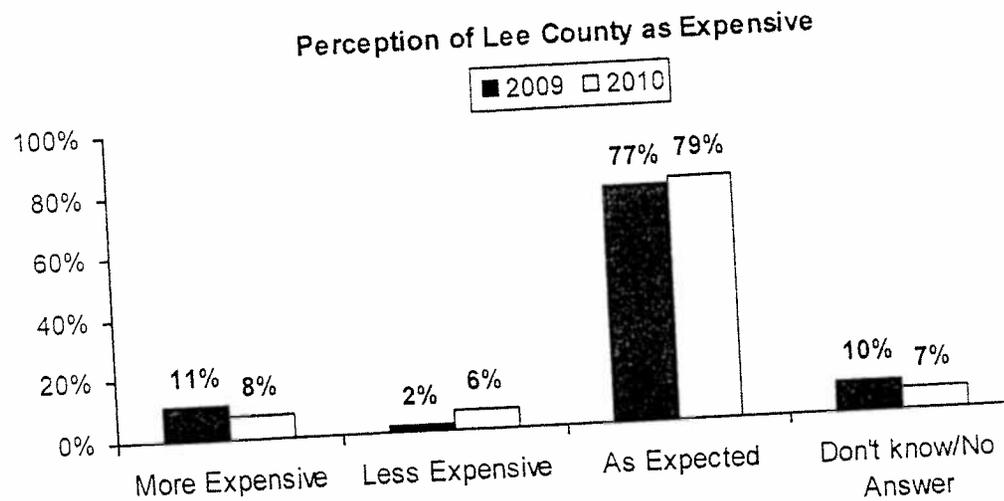


Trip Activities



More Expensive	11%	8%
Less Expensive	2%	6%
As Expected	77%	79%
Don't know/No Answer	10%	7%

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



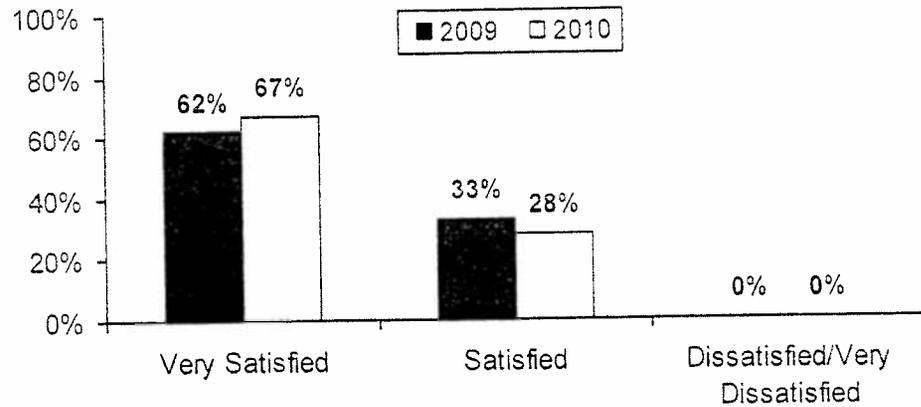
Lee County Experience



	2009	2010
Total Respondents		
Satisfied	95%	95%
Very Satisfied	62%	67%
Satisfied	33%	28%
Neither	2%	2%
Dissatisfied/Very Dissatisfied	-	-
Don't know/no answer	2%	3%

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

Satisfaction with Visit



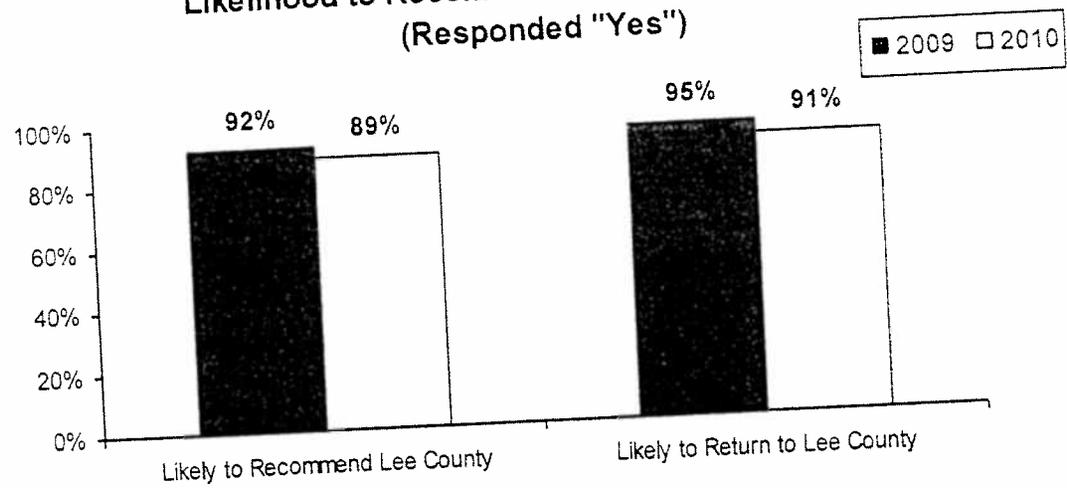
Future Plans



Likely to Recommend Lee County	92%	89%
Likely to Return to Lee County	95%	91%
Likely to Return Next Year	68%	60%

Q32: Would you recommend Lee County to a friend over other vacation areas in Florida?
 Q35: Will you come back to Lee County?
 Q36: Will you come back next year?

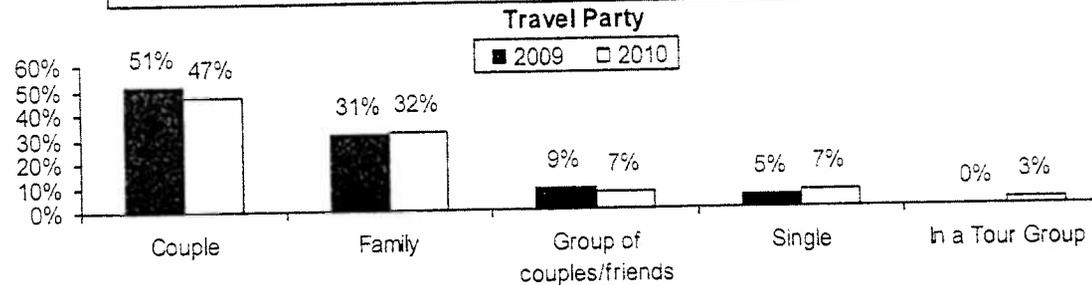
**Likelihood to Recommend/Return to Lee County
 (Responded "Yes")**





Visitor and Travel Party Demographic Profile

	2009	2010
Couple	51%	47%
Family	31%	32%
Group of couples/friends	9%	7%
Single	5%	7%
In a Tour Group	-	3%
Other	2%	2%
Mean travel party size	2.8	2.8
Mean adults in travel party	2.6	2.5



	2009	2010
Traveling with any Children (net)	18%	19%
Any younger than 6	<13%>	7%
Any 6 - 11 years old	8%	9%
Any 12 - 17 years old	4%	6%

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:

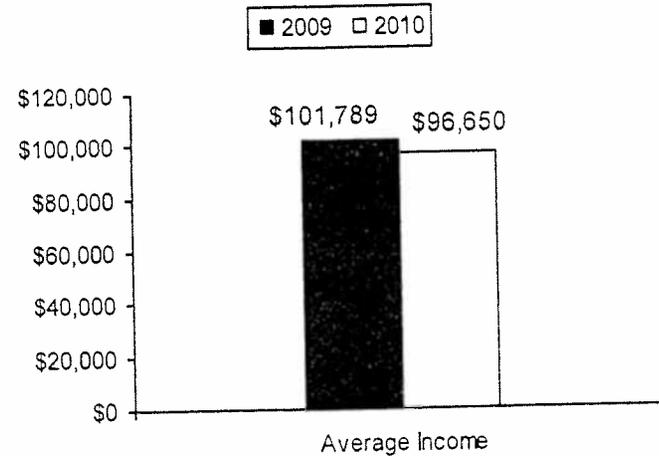
Younger than 6 years old/6-11 years old/12-17 years old/Adults



Visitor and Travel Party Demographic Profile

Vacations per year (mean)	3.0	3.3
Short getaways per year (mean)	3.8	4.4
Age of respondent (mean)	52.8	53.7
Annual household income (mean)	\$101,789	\$96,650
Marital Status		
Married	76%	73%
Single	9%	12%
Other	12%	14%

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

Paid Accommodations	44%	52%	161,644	180,481	11.7%
Friends/Relatives	56%	48%	206,829	169,224	-18.2%
Total Visitation			368,473	349,705	-5.1%
United States	75%	73%	120,705	131,890	9.3%
Canada	6%	15%	9,615	27,766	188.8%
UK	9%	7%	14,663	12,148	-17.2%
Scandinavia	-	2%	-	3,471	-
Germany	7%	1%	11,767	1,735	-85.3%
Switzerland	1%	1%	1,298	1,735	33.7%
BeNeLux	1%	-	2,297	-	-
Austria	1%	-	1,298	-	-
Other	-	1%	-	1,735	-
Florida	10%	11%	12,158	13,883	14.2%
South (including Florida)	28%	18%	33,750	24,296	-28.0%
Midwest	42%	46%	51,191	60,739	18.7%
Northeast	24%	21%	28,810	27,766	-3.6%
West	3%	8%	3,595	10,412	189.6%
No Answer	3%	7%	3,359	8,677	158.3%

Chicago	12%	15,580
Philadelphia	8%	10,438
West Palm Beach-Fort Pierce	7%	9,163
Denver	6%	8,493
Grand Rapids-Kalamazoo-Battle Creek	5%	6,756
Cleveland-Akron (Canton)	4%	5,237
Detroit	4%	5,237
Cincinnati	4%	5,236
Columbus, OH	4%	5,106
Minneapolis-Saint Paul	4%	5,106



· Occupancy Data Analysis November 2010

Property managers representing 146 properties in Lee County were interviewed for the November 2010 Occupancy Survey between November 1 and November 15, 2010, a sample considered accurate to plus or minus 8.1 percentage points at the 95% confidence level.

Property managers representing 152 properties in Lee County were interviewed for the November 2009 Occupancy Survey between November 1 and November 15, 2009, a sample considered accurate to plus or minus 7.9 percentage points at the 95% confidence level.

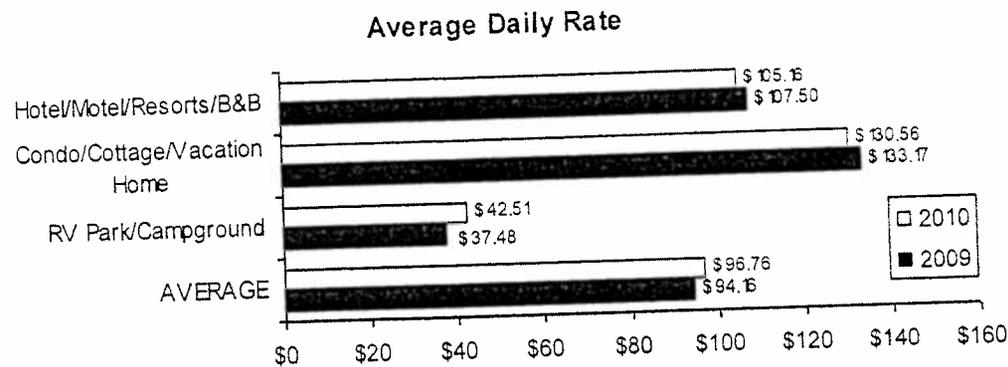
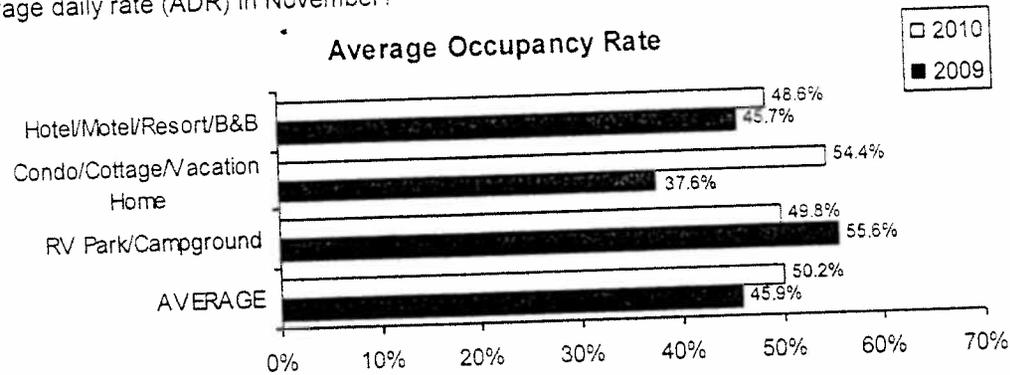


November Occupancy/Daily Rates

Hotel/Motel/Resort/B&B	45.7%	48.6%	6.4%	\$107.50	\$105.16	-2.2%	\$49.09	\$51.11	4.1%
Condo/Cottage/Vacation Home	37.6%	54.4%	44.7%	\$133.17	\$130.56	-2.0%	\$50.06	\$71.03	41.9%
RV Park/Campground	55.6%	49.8%	-10.4%	\$37.48	\$42.51	13.4%	\$20.86	\$21.19	1.6%
AVERAGE	45.9%	50.2%	9.3%	\$94.16	\$96.76	2.8%	\$43.25	\$48.56	12.3%

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

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

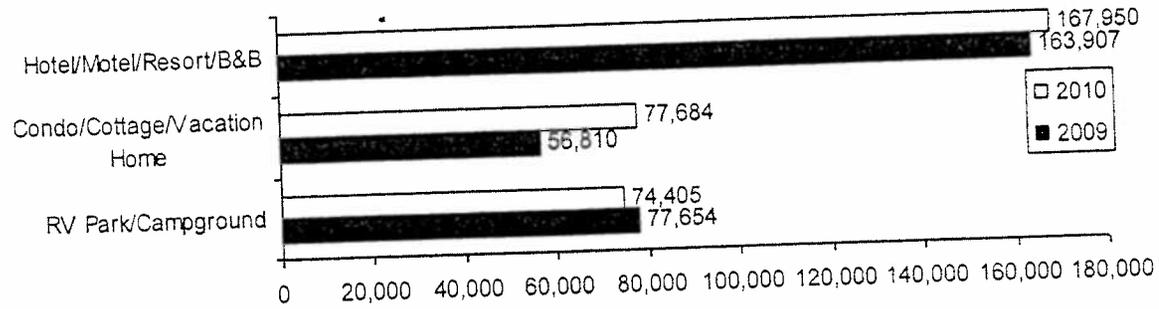




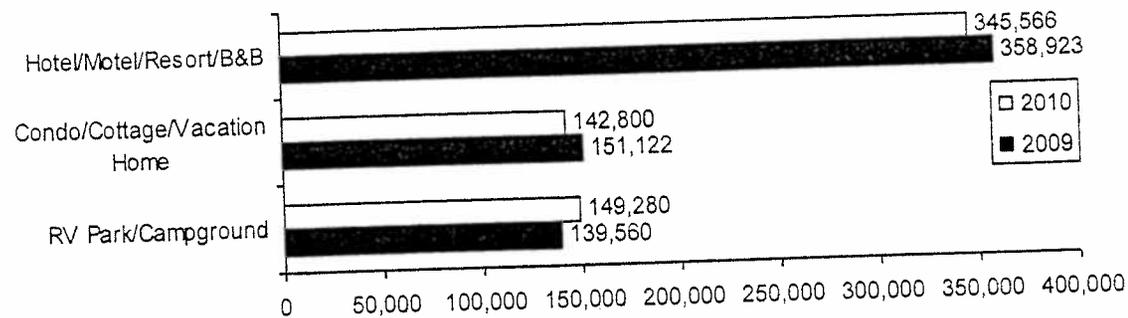
November Room/Unit/Site Nights

Hotel/Motel/Resort/B&B	163,907	167,950	2.5%	358,923	345,566	-3.7%
Condo/Cottage/Vacation Home	56,810	77,684	36.7%	151,122	142,800	-5.5%
RV Park/Campground	77,654	74,405	-4.2%	139,560	149,280	7.0%
Total	298,371	320,039	7.3%	649,605	637,646	-1.8%

Occupied Room Nights



Available Room Nights

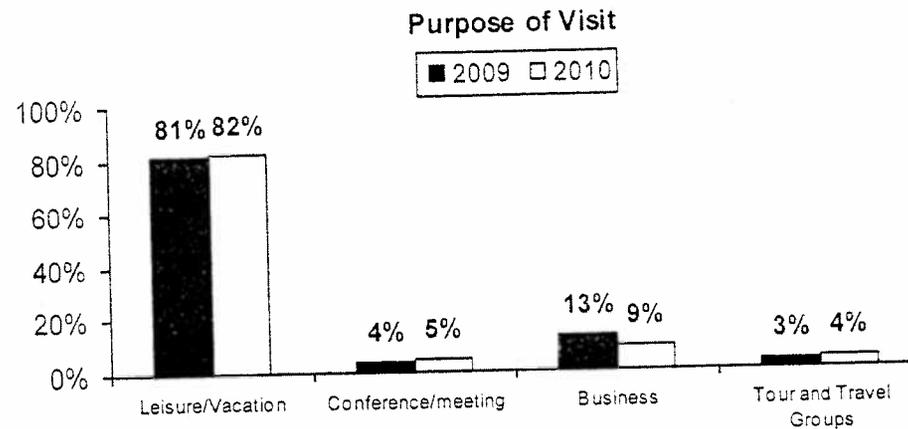




Lodging Management Estimates

Purpose of Visit	2009	2010
Leisure/Vacation	81%	82%
Conference/meeting	4%	5%
Business	13%	9%
Tour and Travel Groups	3%	4%
Average guests per room	2.4	2.5
Average length of stay in nights	6.2	5.7

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

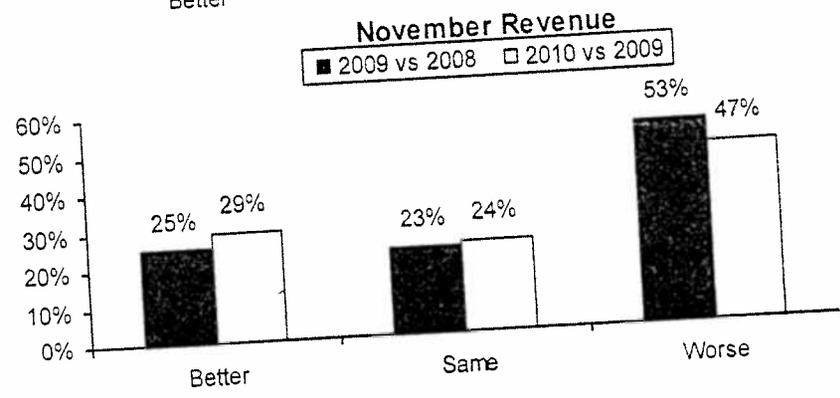
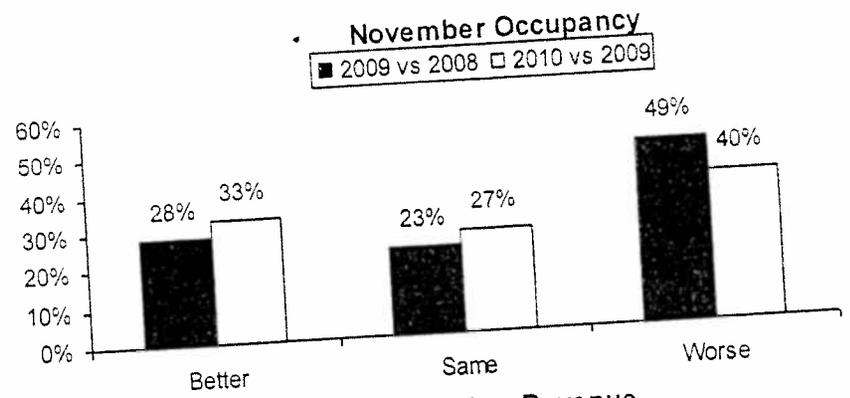




Occupancy Barometer

Better than prior year	28%	33%	25%	29%
Same as prior year	23%	27%	23%	24%
Worse than prior year	49%	40%	53%	47%

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



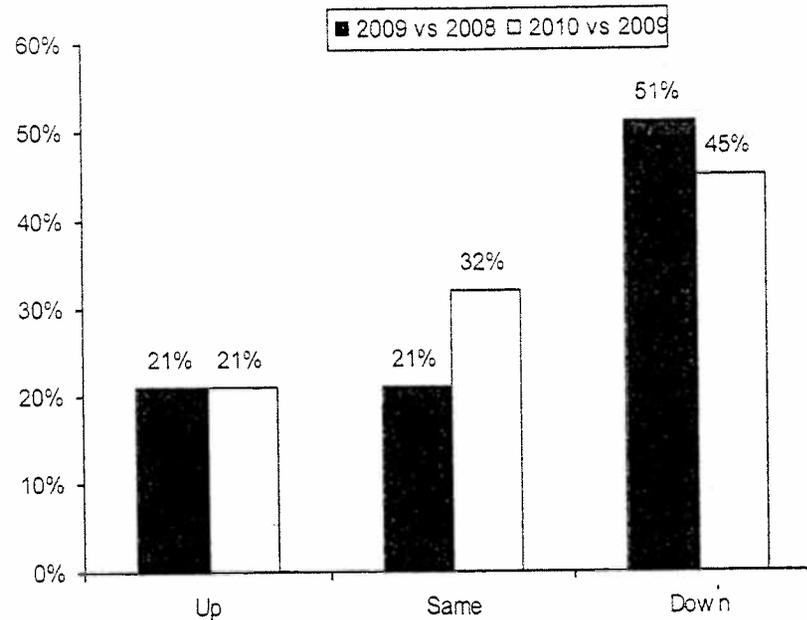


Occupancy Barometer

LEVEL OF RESERVATIONS FOR THE NEXT THREE MONTHS	2009 vs 2008	2010 vs 2009
Up	21%	21%
Same	21%	32%
Down	51%	45%
N/A	7%	2%

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?

Level of Reservations for Next 3 Months



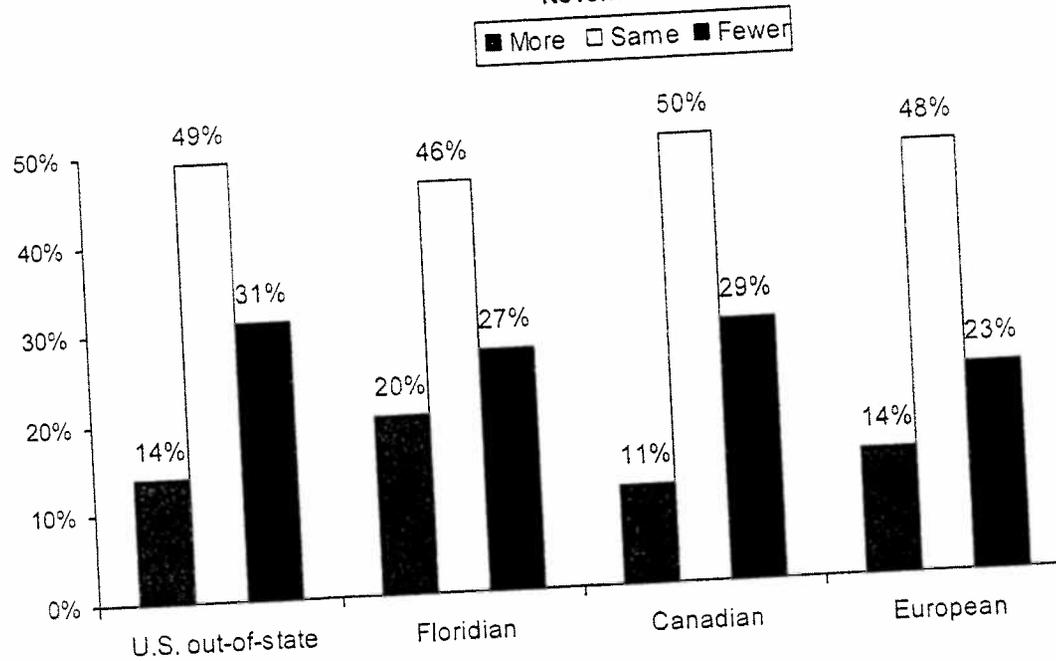


Occupancy Barometer

	2009	2009	2009	2009	2010	2010	2010	2010	2010
U.S out-of-state	16%	14%	40%	49%	33%	31%	11%	6%	
Floridian	17%	20%	33%	<46%>	34%	27%	<16%>	7%	
Canadian	18%	11%	36%	<50%>	29%	29%	17%	9%	
European	16%	14%	35%	<48%>	29%	23%	20%	15%	

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
 November 2010





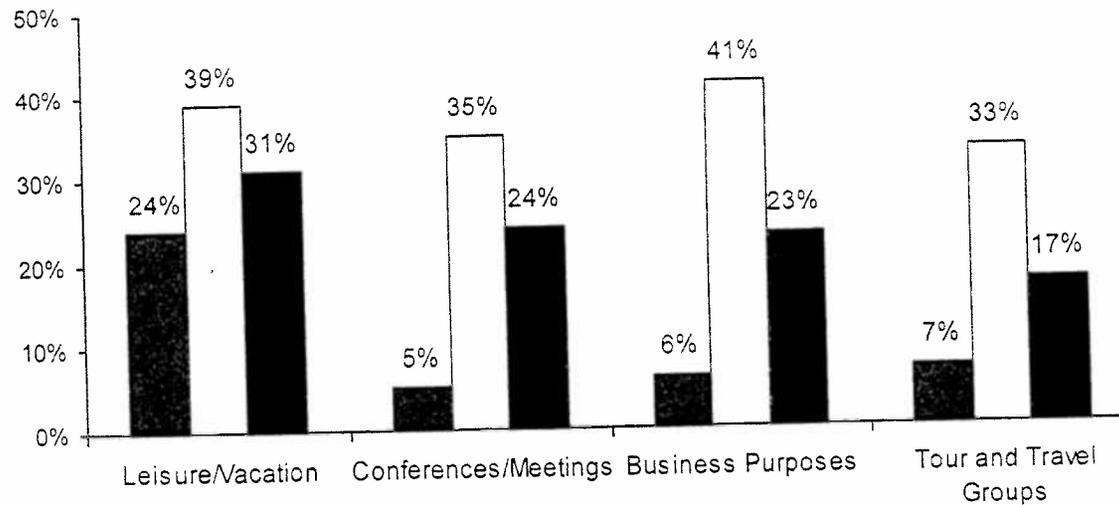
Occupancy Barometer

Leisure/Vacation	18%	24%	36%	39%	34%	31%	<12%>	5%
Conferences/Meetings	8%	5%	18%	<35%>	26%	24%	<49%>	35%
Business Purposes	8%	6%	24%	<41%>	26%	23%	42%	30%
Tour and Travel Groups	5%	7%	20%	<33%>	19%	17%	55%	43%

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

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

■ More □ Same ■ Less





Oil Spill Impact

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

Room Night Cancellations		
	November 2010	December 2009
0 roomnights	47%	48%
1-7 roomnights	1%	-
8-14 roomnights	1%	-
15 or more roomnights	2%	-
Don't know	50%	52%
Average room nights cancelled	2.8	0.0

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

Q32. About how many room nights have been canceled for December, January, February – due to the oil spill and the publicity surrounding it?

Inquiries	
	November 2010
Total Property Managers Responding: 25	
More inquiries (net)	18%
Many more	6%
Some more	12%
About the same number	39%
Fewer inquiries (net)	42%
Some fewer	18%
Many fewer	24%

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

Economic downturn	71%
BP oil spill	15%
Weather	7%
Other	7%

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



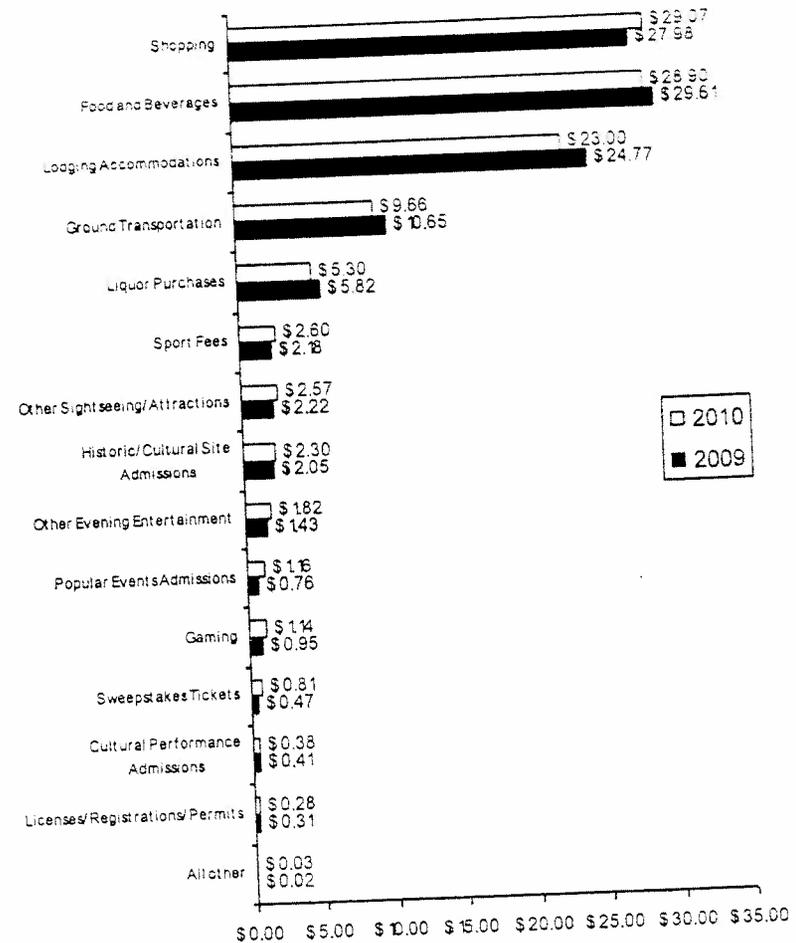
Economic Impact Analysis November 2010



Average Expenditures

Average Expenditures per Person per Day

	2010	2009	% Change
TOTAL	\$109.63	\$109.01	-0.6%
Shopping	\$27.98	\$29.07	3.9%
Food and Beverages	\$29.61	\$28.90	-2.4%
Lodging Accommodations	\$24.77	\$23.00	-7.1%
Ground Transportation	\$10.65	\$9.66	-9.3%
Liquor Purchases	\$5.82	\$5.30	-8.9%
Sport Fees	\$2.18	\$2.60	19.3%
Other Sightseeing/Attractions	\$2.22	\$2.57	15.8%
Historic/Cultural Site Admissions	\$2.05	\$2.30	12.2%
Other Evening Entertainment	\$1.43	\$1.82	27.3%
Popular Events Admissions	\$0.76	\$1.16	52.6%
Gaming	\$0.95	\$1.14	20.0%
Sweepstakes Tickets	\$0.47	\$0.81	72.3%
Cultural Performance Admissions	\$0.41	\$0.38	-7.3%
Licenses/Registrations/Permits	\$0.31	\$0.28	-9.7%
All other	\$0.02	\$0.03	50.0%

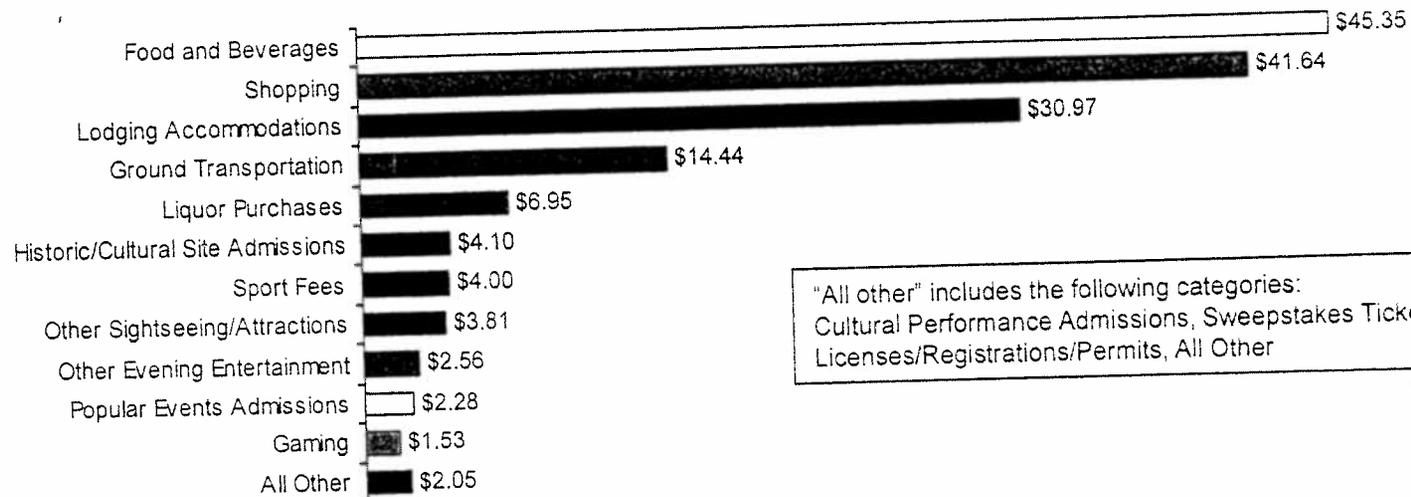




Total Visitor Expenditures by Spending Category

Spending Category	2009	2010	% Change
TOTAL	\$155,446,477	\$159,679,286	2.7%
Food and Beverages	\$42,597,252	\$45,349,829	6.5%
Shopping	\$41,355,967	\$41,644,556	0.7%
Lodging Accommodations	\$28,095,062	\$30,966,087	10.2%
Ground Transportation	\$17,610,866	\$14,440,161	-18.0%
Liquor Purchases	\$8,543,446	\$6,950,886	-18.6%
Historic/Cultural Site Admissions	\$3,374,712	\$4,098,993	21.5%
Sport Fees	\$4,061,846	\$4,003,603	-1.4%
Other Sightseeing/Attractions	\$3,311,194	\$3,813,866	15.2%
Other Evening Entertainment	\$2,342,356	\$2,555,152	9.1%
Popular Events Admissions	\$1,425,183	\$2,281,952	60.1%
Gaming	\$741,664	\$1,527,435	105.9%
All Other	\$1,986,929	\$2,046,766	3.0%

November 2010 Total Expenditures
(Millions)



"All other" includes the following categories:
Cultural Performance Admissions, Sweepstakes Tickets,
Licenses/Registrations/Permits, All Other



Total Visitor Expenditures by Spending Category

TOTAL	\$96,854,719	\$106,581,120	10.0%	\$58,591,758	\$53,098,166	-9.4%
Lodging Accommodations	\$28,095,062	\$30,966,087	10.2%	\$0	\$0	-
Shopping	\$23,302,004	\$25,879,572	11.1%	\$18,053,963	\$15,764,984	-12.7%
Food and Beverages	\$23,123,026	\$25,368,540	9.7%	\$19,474,226	\$19,981,289	2.6%
Ground Transportation	\$9,075,638	\$8,407,611	-7.4%	\$8,535,228	\$6,032,550	-29.3%
Liquor Purchases	\$4,154,480	\$4,316,372	3.9%	\$4,388,966	\$2,634,514	-40.0%
Sport Fees	\$1,840,309	\$2,781,505	51.1%	\$2,221,537	\$1,222,098	-45.0%
Other Sightseeing/Attractions	\$2,027,819	\$2,432,154	19.9%	\$1,283,375	\$1,381,712	7.7%
Historic/Cultural Site Admissions	\$1,775,757	\$2,065,850	16.3%	\$1,598,955	\$2,033,143	27.2%
Popular Events Admissions	\$657,655	\$1,427,119	117.0%	\$767,528	\$854,833	11.4%
Other Evening Entertainment	\$1,193,013	\$1,120,101	-6.1%	\$1,149,343	\$1,435,051	24.9%
Gaming	\$696,034	\$806,416	15.9%	\$45,630	\$721,019	1480.1%
All Other	\$913,922	\$1,009,793	10.5%	\$1,073,007	\$1,036,973	-3.4%

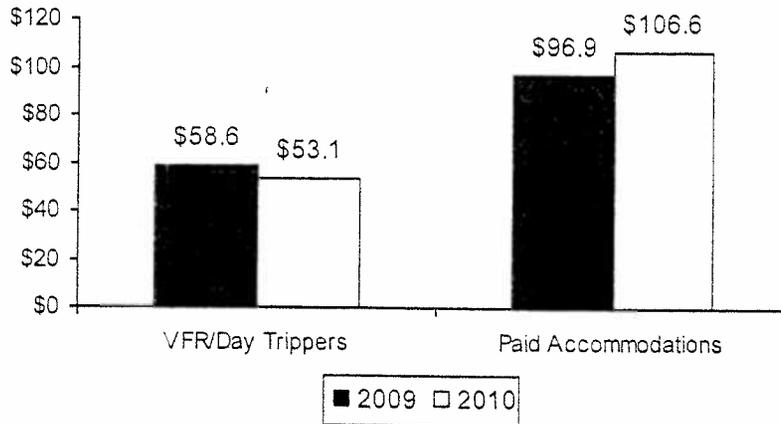
"All other" includes the following categories:
Cultural Performance Admissions, Sweepstakes Tickets,
Licenses/Registrations/Permits, All Other



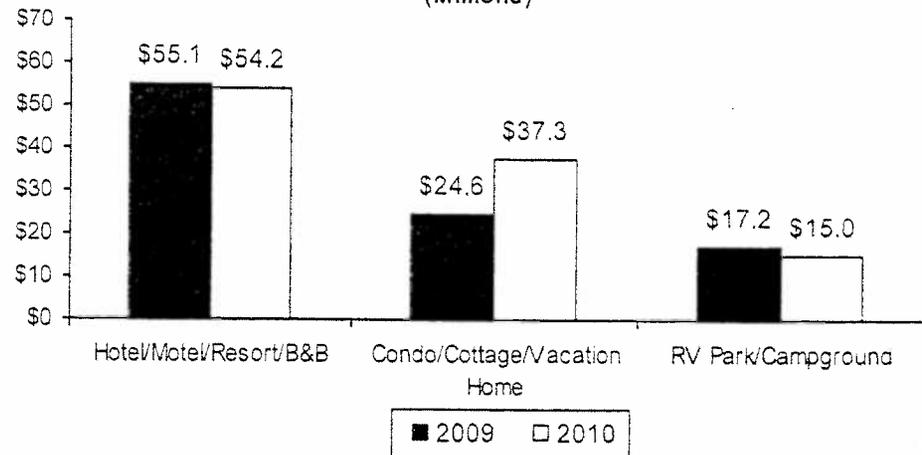
Total Visitor Expenditures by Lodging Type

November Total Expenditures by Lodging Type					
	2009	2010	% Change	2009	2010
TOTAL	\$155,446,477	\$159,679,286	2.7%	100%	100%
Visiting Friends & Relatives/Day Trippers	\$58,591,758	\$53,098,166	-9.4%	38%	33%
Paid Accommodations	\$96,854,719	\$106,581,120	10.0%	62%	67%
<i>Hotel/Motel/Resort/B&B</i>	\$55,060,574	\$54,240,785	-1.5%	35%	34%
<i>Condo/Cottage/Vacation Home</i>	\$24,571,937	\$37,315,261	51.9%	16%	23%
<i>RV Park/Campground</i>	\$17,222,208	\$15,025,074	-12.8%	11%	9%

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.



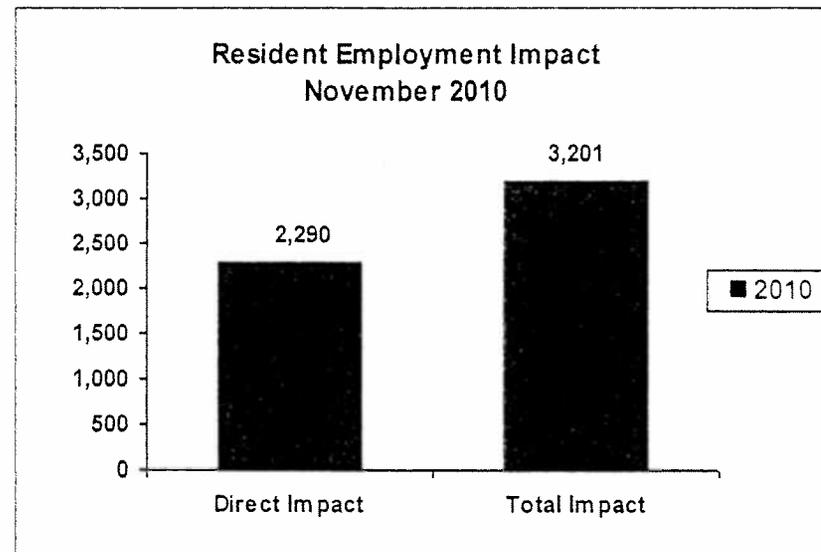
Impact on Jobs for Lee County Residents

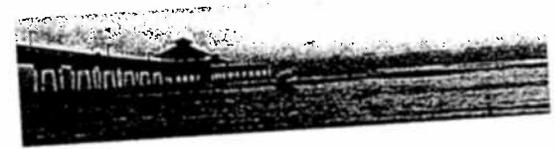
In order to produce the output (food, lodging, entertainment, etc.) purchased by visitors, businesses have to employ people.

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.).





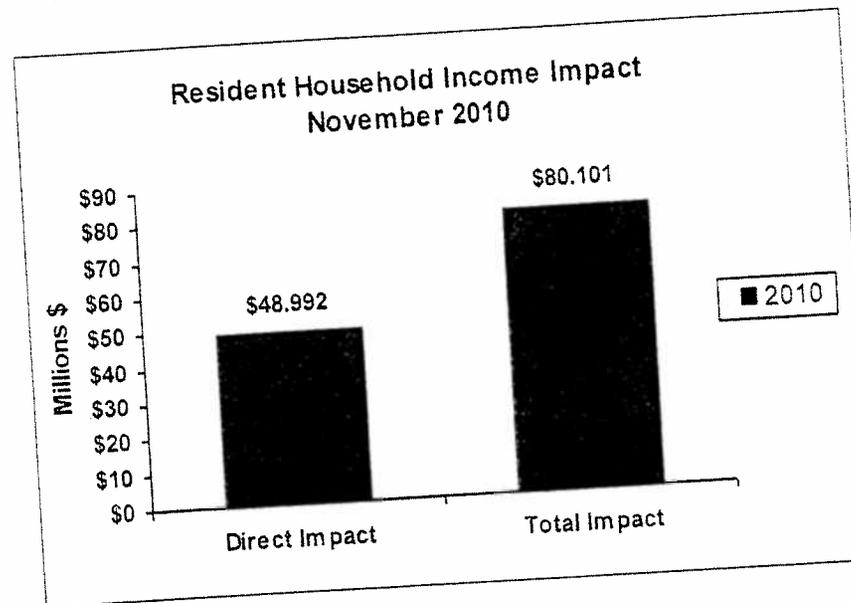
Impact on Household Income for Lee County Residents

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.

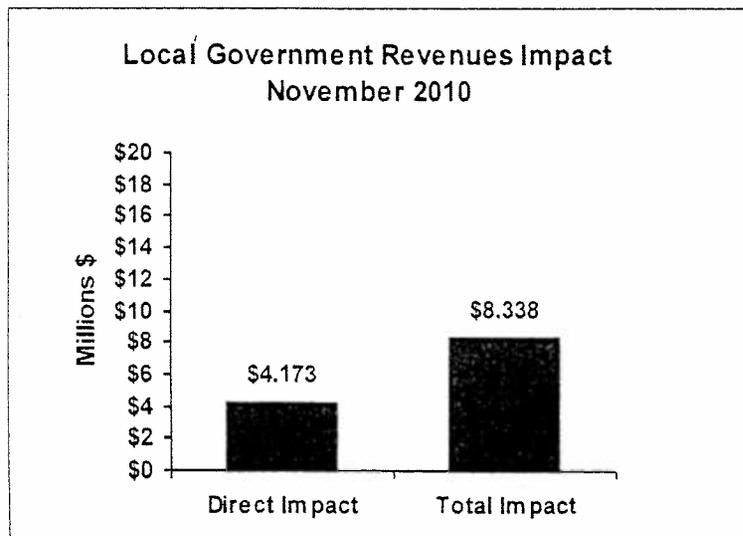
The gross government revenues accruing to governments as a result of producing the output purchased with visitor expenditures is the government revenue impact.

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.

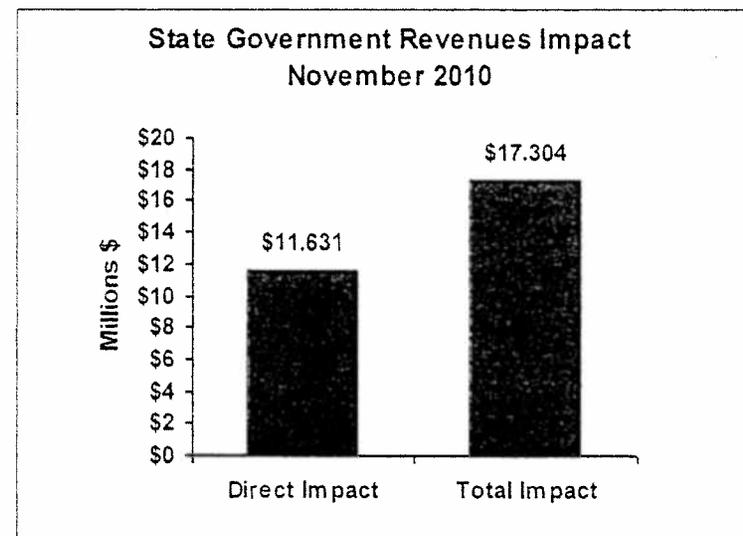
State government revenue impact is a result of revenues provided to the Florida state government. This includes sales tax and any operating income for state government agencies.

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).



November 2010



51



Appendix
November 2010



November 2010 Interviewing Statistics

Bonita Springs	Bonita Beach	5-Nov	24
Fort Myers Beach	Times Square	12-Nov	25
Ft. Myers	Edison Estates	16-Nov	26
Sanibel	Holiday Inn	18-Nov	10
Sanibel	Loggerhead Cay	18-Nov	7
Sanibel	Song of the Sea	18-Nov	6
Sanibel	Tortuga Beach Club	18-Nov	6
Ft. Myers	Centennial Park	20-Nov	6
Ft. Myers	Clarion	20-Nov	5
Ft. Myers	Summerline Square Trolley	20-Nov	7
Sanibel	Lighthouse Beach	26-Nov	28
Cape Coral	Cape Coral Yacht Club	27-Nov	11
Ft. Myers	Best Western	27-Nov	9
Fort Myers Beach	Diamond Head Resort	30-Nov	5
Fort Myers Beach	Estero Island Beach Club	30-Nov	8
Fort Myers Beach	Lani Kai	30-Nov	4
Fort Myers Beach	The Pier	30-Nov	14
TOTAL			201



Occupancy Interviewing Statistics

Interviews were conducted from November 1 – November 15, 2010. Information was provided by 146 Lee County lodging properties.

Hotel/Motel/Resort/B&Bs	91
Condo/Cottage/Vacation Home/Timeshare	37
RV Park/Campground	18
Total	146