THE BEACHES OF FORT MYERS AND SANIBEL

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

Summer 2012 Visitor Profile and Occupancy Analysis

November 2012

Prepared for:

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

Prepared by:

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dpa
providing direction
in travel & tourism

Executive Summary

Summer 2012

Throughout this report, statistically significant differences between responses for 2011 and 2012 at the 95% confidence level are noted with an A,B lettering system.

For example:

2010 A	2011 B
60%	70%A

In the table above 70% in Column B is statistically greater than 60% in Column A.

Executive Summary

Visitation Estimates

- During the summer season of 2012, Lee County hosted approximately 547,000 visitors staying in paid accommodations and 448,600 staying with friends or relatives while visiting, for an estimated total of nearly one million visitors.
- Summer 2012 visitation among paid accommodations guests was up 1.2% from 2011, and visitation among those staying with friends or relatives was up 8.9% year-over-year. As a result, Lee County saw a 4.5% increase in total visitation over summer 2011.

Estimated Visitation	2011	2012	% Change
Paid Accommodations	540,439	546,952	1.2%
Friends/Relatives	411,977	448,640	8.9%
Total Visitation	**952,416**	**995,592**	**4.5%**

Visitor Expenditures

- Summer 2012 visitors spent an estimated $457.5 million during their stay in Lee County, which was on par with estimated spending among summer 2011 visitors ($455.5 million) but notably higher than the prior two years.
- Expenditures among summer 2012 paid accommodations guests amounted to $277.3 million (61% of the total). Visitors staying with friends or relatives contributed the remaining $180.2 million. Spending among summer season paid accommodations guests was relatively flat year-over-year (-0.5%), while Lee County saw a modest increase among the VFR traveler segment (+2.0%).

Estimated Expenditures	2011	2012	% Change
Paid Accommodations	$278,762,469	$277,271,867	-0.5%
Friends/Relatives	$176,692,186	$180,224,300	+2.0%
Total Expenditures	**$455,454,655**	**$457,496,167**	**0.4%**

Visitor Origin

- Three-quarters of summer 2012 visitors staying in paid accommodations were U.S. residents (75%) – about the same incidence as last year (73%). The majority of international visitors staying in paid accommodations came from Germany, followed by the UK and Canada.

- Four in ten domestic paid accommodations guests came from the South (39%) and about as many from the Midwest (37%). Guests from the Northeast and West were far fewer in numbers.

- Miami was the top domestic feeder market for the Lee County lodging industry during summer 2012. While Tampa and West Palm were also key contributors from in-state markets, New York delivered more paid accommodations visitors.

2012 Top DMAs (Paid Accommodations)

Miami-Fort Lauderdale	8%	34,185
New York	6%	25,638
Tampa-Saint Petersburg	5%	20,755
West Palm Beach-Fort Pierce	5%	18,313
Cincinnati	4%	15,871
Saint Louis	4%	15,871
Chicago	4%	14,651
Columbus, OH	3%	12,209
Cleveland-Akron	3%	12,209
Indianapolis	3%	10,988
Pittsburgh	3%	10,988

Visitors Staying in Paid Accommodations

	%		Visitor Estimates		% Change
Country of Origin	**2011**	**2012**	**2011**	**2012**	
United States	73%	75%	393,682	410,214	4.2%
Germany	8%	9%	40,766	47,614	16.8%
UK	7%	5%	38,436	24,418	-36.5%
Canada	4%	3%	23,295	13,430	-42.3%
Scandinavia	1%	2%	6,988	12,209	74.7%
France	2%	2%	10,483	8,546	-18.5%
BeNeLux	2%	1%	8,153	6,104	-25.1%
Latin America	<1%	1%	2,329	3,663	57.2%
Switzerland	1%	1%	6,988	3,663	-47.6%
Ireland	1%	<1%	3,494	2,442	-30.1%
Austria	1%	-	3,494	-	-
Other International	<1%	2%	2,329	12,209	424.2%-
No Answer	-	<1%	-	2,442	-

Visitors Staying in Paid Accommodations

	%		Visitor Estimates		% Change
U.S. Region of Origin	**2011**	**2012**	**2011**	**2012**	
Florida	29%	22%	114,144	89,124	-21.9%
South (including Florida)	46%	39%	180,535	158,714	-12.1%
Midwest	28%	37%	109,485	151,389	38.3%
Northeast	16%	18%	62,896	75,694	20.3%
West	1%	2%	4,659	9,767	109.6%
No Answer	9%	4%	36,107	14,651	-59.4%

< > indicates a significant difference between 2011 and 2012 responses at the 95% confidence level.

Note: The percentage of visitors by origin market is based on data collected from visitors in the Visitor Profile Survey.

Trip Planning

- The trip planning window reported by summer 2012 visitors was similar in length to that of summer 2011 visitors – for many visitors, their trip was planned well in advance. Seven in ten started talking about their Lee County trip three or more months in advance and six in ten chose the destination within that timeframe. Fewer than half made their lodging reservations that far out.
    - 69% started talking about trip 3+ months in advance (vs. 68% in 2011)
    - 62% chose Lee County for trip (vs. 60% in 2011)
    - 45% made lodging reservation (vs. 46% in 2011)

- The internet continues to be a prominent trip planning resource among summer visitors to Lee County – the majority claimed to have visited one or more websites (85%) while planning this trip. Visitors most often mentioned using airline websites and search engine websites (37% and 34% respectively).

- Multi-modal access to online destination planning information is not uncommon among Lee County visitors – more than half of them reported they use two or more devices as a gateway for viewing this content. Most visitors said they typically use their laptop or desktop computer (68% and 52% respectively), followed by a sizeable minority who indicated they use a smartphone (41%).

- Lee County's promise of tranquility, beaches, and warm weather were the most frequently cited attributes that positively influenced summer visitors' selection of the destination: *peaceful/relaxing* (87%), *white sandy beaches (81%),* and *warm weather* (81%).

Visitor Profile

- Two-thirds of summer 2012 visitors flew to the area (65%), and three-quarters of those air travelers landed at Southwest Florida International Airport (77%) – both significantly higher than reports from summer 2011 visitors.

- Summer visitors reported they were staying in Lee County 7 or 8 days on average – about the same as last summer. Nine in ten visitors said the purpose of their trip was to vacation (90%). Two-thirds were repeat visitors (67%), averaging about one trip per year in the past five years.

- Slightly fewer than half of summer visitors interviewed indicated they were staying in hotel/motel/resorts (46%) during their trip, and one in four said they were staying in a condo/vacation home property they rented, owned or borrowed (38%). Half of those staying in paid accommodations reported that the quality *far exceeded* or *exceeded expectations* (49%).

Visitor Profile (cont'd)

- As is typical, the top activities visitors enjoyed in Lee County during summer 2012 were: *beaches* (96%), *relaxing* (81%), *dining out* (73%), and *swimming* (72%). Many also experienced Lee County's *shopping* (59%) venues. Further, when asked which attractions they were visiting on their Lee County trip, *beaches* received the highest level of mentions at 89% and *Fort Myers Beach Pier* followed at 43%. About four in ten visitors ventured outside of Lee County for a day trip (43%) – most of them going to nearby Naples.

- Overall, visitor satisfaction remains extremely high – almost all summer 2012 visitors said they were either *very satisfied* or *satisfied* with their visit (59% and 34% respectively). Summer visitors largely perceive the destination to be no more or less expensive than they had expected it would be (78% as expected), which undoubtedly has a positive impact on their satisfaction.

- Importantly, there is a strong desire to return to the destination. When queried 86% said they are likely to return to Lee County, and half of them said they will return next year (55%). The propensity for positive word-of-mouth value appears to be high as well, with the majority of summer visitors indicating they would recommend Lee County to a friend over other areas in Florida (88%).

- With so much good-will about the destination, it is not surprising that negative comments about their visit were not overwhelmingly concentrated on any one element. The number one complaint – the aspect summer 2012 visitors liked least about the area during their visit – was the *insects,* but only one-quarter mentioned it as a dislike (27%). The second highest mention was *beach seaweed* (18%).

- The demographic composition of summer 2012 visitors can be summarized as follows:

    - 47 years of age on average
    - $102,400 household income on average
    - 73% married
    - 49% traveling as a family
    - 33% traveling as a couple
    - 38% traveling *with* children
    - 3 to 4 people in travel party on average

Lodging Industry Assessments

- For the Lee County lodging industry in total, *available* room nights declined 2.8% from summer 2011 to 2012 and *occupied* room nights fell 1.7%. All property categories saw a decline in *available* room nights, but only the hotel/motel/resort category met that challenge with a corresponding increase in *occupied* room nights.

	Occupied Room Nights			Available Room Nights		
	2011	2012	% Change	2011	2012	% Change
Hotel/Motel/Resort/B&B	515,321	522,417	1.4%	1,034,575	1,013,580	-2.0%
Condo/Cottage/Vacation Home	192,877	185,768	-3.7%	445,764	438,269	-1.7%
RV Park/Campground	130,241	115,913	-11.0%	471,572	444,463	-5.8%
Total	**838,439**	**824,098**	**-1.7%**	**1,951,911**	**1,896,312**	**-2.8%**

- The industry-wide average occupancy rate in Lee County increased from 43.0% in summer 2011 to 43.5% in summer 2012 (+1.2%). Average occupancy rate for the hotel/motel/resort category increased (+3.4%), while condos/vacation homes and RV parks/campgrounds saw average occupancy rate decline (-2.1% and -5.4% respectively).
- Lee County's average daily rate increased 1.8% year-over-year. All property categories saw slight growth in ADR versus last summer.
- The increases in both average occupancy rate and ADR produced a 3.0% boost in RevPAR from summer 2011 to summer 2012. This was due to the positive performance observed for hotels/motels/resorts, which outweighed the declines experienced by condos/vacation homes and RV parks/campgrounds.

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
Property Managers Responding	**313**	**297**		**314**	**297**		**313/314**	**297/297**	
Hotel/Motel/Resort/B&B	49.8%	51.5%	3.4%	$109.44	$110.31	0.8%	$54.51	$56.86	4.3%
Condo/Cottage/Vacation Home	43.3%	42.4%	-2.1%	$132.21	$133.28	0.8%	$57.21	$56.49	-1.3%
RV Park/Campground	27.6%	26.1%	-5.4%	$39.30	$40.13	2.1%	$10.86	$10.47	-3.6%
AVERAGE	**43.0%**	**43.5%**	**1.2%**	**$103.78**	**$105.62**	**1.8%**	**$44.58**	**$45.90**	**3.0%**

Lodging Industry Assessments (cont’d)

- Tropical Storm Isaac, and the resulting precautionary evacuations displacing some guests from coastal lodging properties in late August 2012, may have had a dampening effect on the average occupancy rate in Lee County for the period. About two-thirds of managers of coastal properties said they lost business in August as a result of the storm, whereas only one-third of inland property managers claimed the same.
- Lee County property managers’ optimism about projected reservations in the coming months was about the same as was reported this time last year. About one-third of managers responding reported that their total level of reservations for the next three months are up over the same period the prior year (36%) – similar to reports in 2011 (41%). Another four in ten said reservations for the next three months of 2012 are at least the same as the same time last year (41% vs. 36% in 2011), and fewer than one-quarter claimed that their reservations are down for the next three months (21% vs. 22% in 2011).

Summer 2012 Lee County Snapshot

Total Visitation

	%		Visitor Estimates	
	2011	2012	2011	2012
Paid Accommodations	57%	55%	540,439	546,952
Friends/Relatives	43%	45%	411,977	448,640
Total Visitation			*952,416*	*995,592*

Total Visitor Expenditures

	2011	2012	% Change
Total Visitor Expenditures	$176,692,186	$180,224,300	2.0%
Paid Accommodations	$278,762,469	$277,271,867	-0.5%

Visitor Origin - Visitors Staying in Paid Accommodations

	%		Visitor Estimates	
	2011	2012	2011	2012
Florida	29%	22%	114,144	89,124
United States	73%	75%	393,682	410,214
Germany	8%	9%	40,766	47,614
UK	7%	5%	38,436	24,418
Canada	4%	3%	23,295	13,430
Other International	8%	9%	44,260	48,835
No Answer	-	<1%	-	2,442

Average Per Person Per Day Expenditures

2011	2012	% Change
$108.75	$112.55	+3.5%

First-Time/Repeat Visitors to Lee County

	2011	2012
First-time	31%	32%
Repeat	68%	67%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
Property Managers Responding	**313**	**297**		**314**	**297**		**313/314**	**297/297**	
Hotel/Motel/Resort/B&B	49.8%	51.5%	3.4%	$109.44	$110.31	0.8%	$54.51	$56.86	4.3%
Condo/Cottage/Vacation Home	43.3%	42.4%	-2.1%	$132.21	$133.28	0.8%	$57.21	$56.49	-1.3%
RV Park/Campground	27.6%	26.1%	-5.4%	$39.30	$40.13	2.1%	$10.86	$10.47	-3.6%
AVERAGE	**43.0%**	**43.5%**	**1.2%**	**$103.78**	**$105.62**	**1.8%**	**$44.58**	**$45.90**	**3.0%**

Calendar YTD 2012 Lee County Snapshot

Total Calendar Year Visitation

	%		Visitor Estimates	
	2011	2012	2011	2012
Paid Accommodations	53%	50%	1,913,600	1,862,636
Friends/Relatives	47%	50%	1,705,073	1,839,482
Total Visitation			*3,618,673*	*3,702,118*

Total Visitor Expenditures

	2011	2012	% Change
Total Visitor Expenditures	$2,202,557,505	$2,166,114,218	-1.7%
Paid Accommodations	$1,396,063,027	$1,389,302,507	-0.5%

Visitor Origin - Visitors Staying in Paid Accommodations

	%		Visitor Estimates	
	2011	2012	2011	2012
Florida	14%	11%	217,820	167,123
US	81%	80%	1,545,206	1,496,965
Germany	4%	6%	71,632	114,272
Canada	6%	3%	111,103	62,850
UK	4%	3%	73,094	54,279
Other International	5%	7%	95,022	131,413
No Answer	1%	<1%	17,543	2,857

Average Per Person Per Day Expenditures

2011	2012	% Change
$113.74	$118.23	+4.0%

First-Time/Repeat Visitors to Lee County

	2011	2012
First-time	26%	26%
Repeat	72%	73%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
Hotel/Motel/Resort/B&B	59.7%	61.9%	3.8%	$137.32	$141.11	2.8%	$81.95	$87.40	6.6%
Condo/Cottage/Vacation Home	58.3%	59.9%	2.9%	$174.70	$180.62	3.4%	$101.78	$108.25	6.4%
RV Park/Campground	51.8%	50.1%	-3.3%	$47.05	$50.17	6.6%	$24.38	$25.14	3.1%
AVERAGE	**57.5%**	**58.7%**	**2.0%**	**$126.63**	**$131.94**	**4.2%**	**$72.80**	**$77.39**	**6.3%**

Visitor Profile Analysis

September 2012

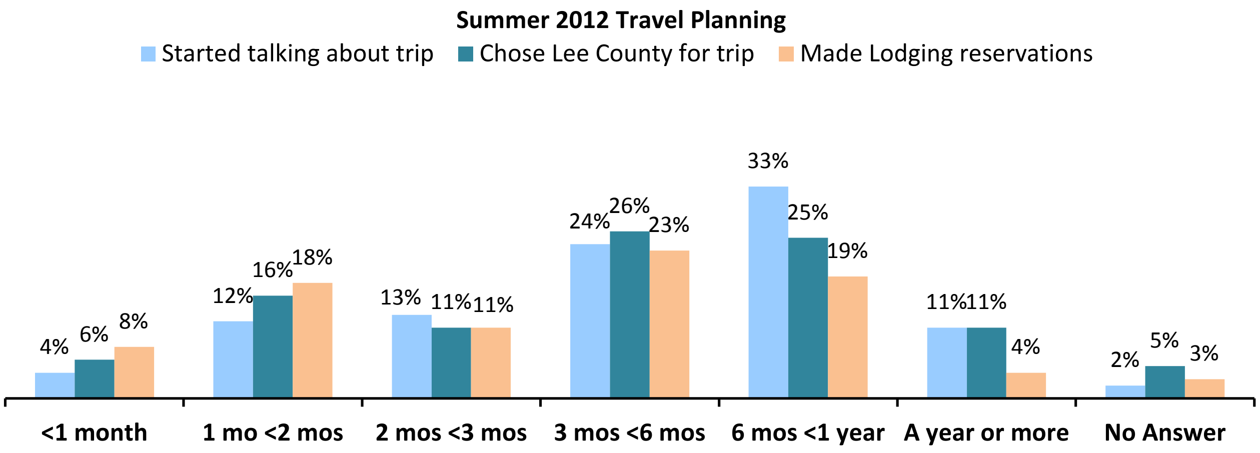
A total of 617 *interviews were conducted with visitors in Lee County during the summer months of July, August, and September 2012. A total sample of this size is considered accurate to plus or minus 4.0 percentage points at the 95% confidence level.*

A total of 609 interviews were conducted with visitors in Lee County during the summer months of July, August, and September 2011. A total sample of this size is considered accurate to plus or minus 4.0 percentage points at the 95% confidence level.

Travel Planning

	Started Talking About Trip		Chose Lee County for Trip		Made Lodging Reservations	
	2011	2012	2011	2012	2011	2012
	A	B	A	B	A	B
Total Respondents	**609**	**617**	**609**	**617**	**609**	**617**
Less than 3 months (NET)	30%	29%	35%	34%	44%B	37%
<1 month	5%	4%	7%	6%	10%	8%
1 month - <2 months	11%	12%	14%	16%	18%	18%
2 months - <3 months	14%	13%	14%	11%	16%B	11%
3 months or more (NET)	68%	69%	60%	62%	46%	45%
3 months - <6 months	29%	24%	27%	26%	27%	23%
6 months - <1 year	28%	33%	24%	25%	14%	19%A
A year or more	11%	11%	9%	11%	5%	4%
No Lodging Reservations Made	N/A	N/A	N/A	N/A	N/A	16%
No Answer	2%	2%	5%	5%	10%B	3%

Q3a: When did you "start talking" about going on this trip? Q3b: When did you choose Lee County for this trip?
Q3c. When did you make lodging reservations for this trip?



Travel Planning

Devices Used to Access Destination Planning Information

	2012
Total Respondents	**617**
Any (NET)	96%
Laptop computer	68%
Desktop computer	52%
Smartphone (iPhone, Blackberry, etc.)	41%
Tablet (iPad, etc.)	24%
E-Reader (Nook, Kindle, etc.)	5%
Other portable device	1%
None of these	3%
No Answer	1%

Q5. Which of the following devices, if any, do you typically use to access destination planning information available online? (Please mark ALL that apply.)

Note: New question added in 2012.

Travel Websites Visited

	2011	2012
	A	B
Total Respondents 2011 - who have access to a computer 2012 - who use devices for destination planning	**572**	**593**
Visited web sites (net)	81%	85%
Airline websites	26%	37%A
Search Engines	33%	34%
Hotel websites	29%	29%
Booking websites	26%	29%
Trip Advisor	20%	20%
www.FortMyers-Sanibel.com	15%	18%
Visit Florida	12%	10%
Facebook	N/A	6%
AAA	8%	6%
Travel Channel	1%	N/A
Other	18%B	13%
None/Didn't visit websites	16%B	12%
No Answer	3%	3%

Q6. While planning this trip, which of the following web sites did you visit? (Please mark ALL that apply.)

Note: Question 6 revised in 2012. Results are not directly comparable to the same month last year.

Travel Planning

Travel Information Requested

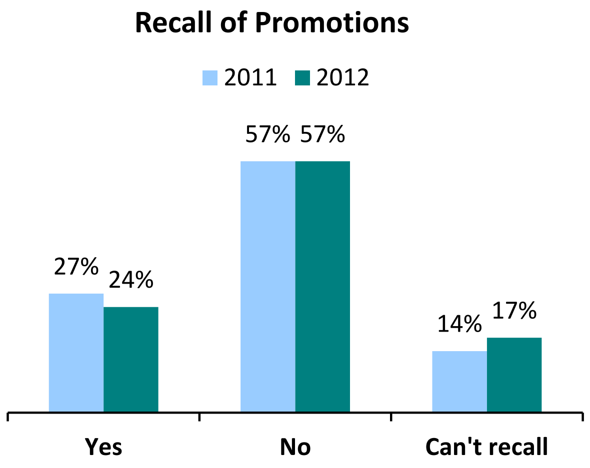
	2011	2012
	A	B
Total Respondents	**609**	**617**
Requested information (NET)	37%	33%
Hotel Web Site	15%	16%
VCB website	9%	7%
Call hotel	5%	7%
Visitor Guide	5%	4%
ENewsletter	<1%	1%
Other	14%B	9%
None/Did not request information	54%	63%A
No Answer	10%B	4%

Q7: For this trip, did you request any information about our area by: (Please mark ALL that apply.)

Recall of Lee County Promotions

	2011	2012
	A	B
Total Respondents	**609**	**617**
Yes	27%	24%
No	57%	57%
Can't Recall	14%	17%

Q8: Over the past six months, have you seen, read or heard any travel stories, advertising or promotions for the Lee County area?

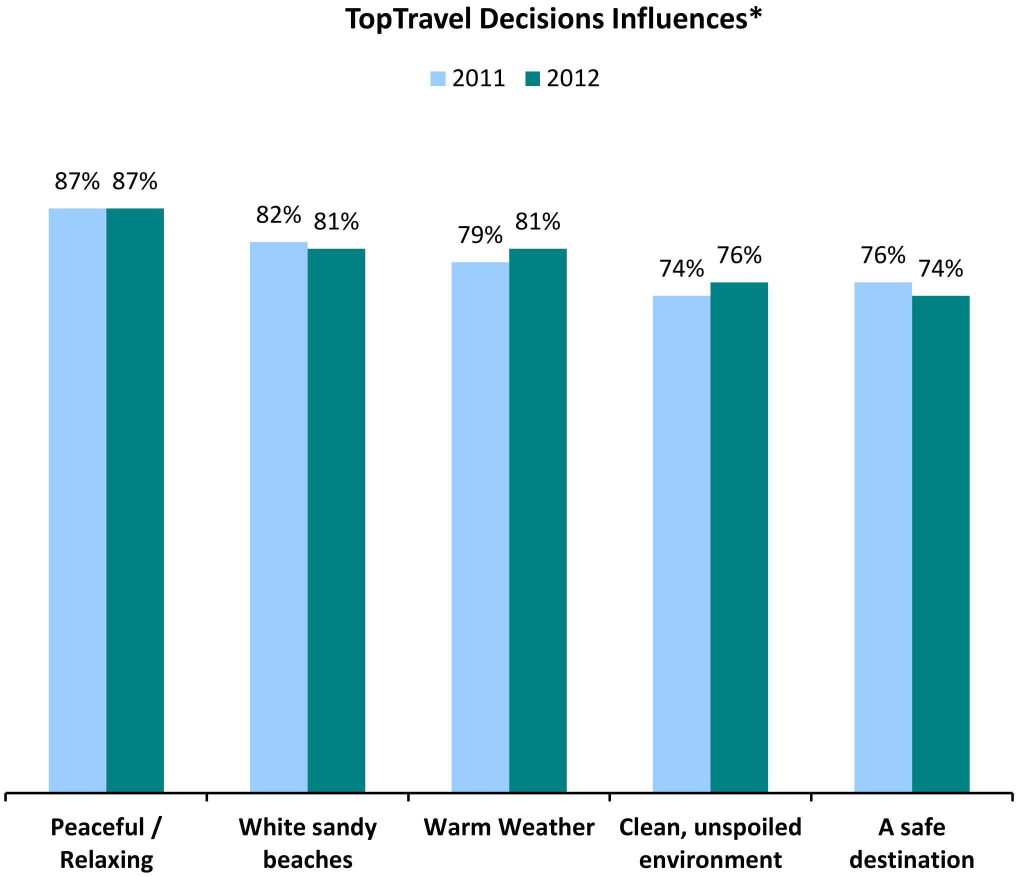


Travel Planning

Travel Decision Influences*	2011	2012
	A	B
Total Respondents	**609**	**617**
Peaceful / Relaxing	87%	87%
White sandy beaches	82%	81%
Warm weather	79%	81%
Clean, unspoiled environment	74%	76%
A Safe Destination	76%	74%
Convenient Location	73%	71%
Good value for the money	73%	71%
Reasonably priced lodging	69%	65%
A "family" atmosphere	64%	65%
Plenty to see and do	62%	61%
Affordable dining	58%	59%
Upscale Accommodations	58%	58%

Q9: When you were talking about coming to Lee County, if one (1) is "Not at All Influential" and five (5) is "Definitely Influential," how strongly did the following influence your selection?

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



Trip Profile

Mode of Transportation

	2011	2012
	A	B
Total Respondents	**609**	**617**
Fly	58%	65%A
Drive a personal vehicle	34%B	28%
Drive a rental vehicle	7%	7%
Drive an RV	1%	<1%
Other/No Answer (NET)	<1%	1%

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

Airport Used

	2011	2012
	A	B
Total Respondents	**351**	**399**
SW Florida Int'l (Fort Myers)	68%	77%A
Miami Int'l	10%	8%
Orlando Int'l	9%	6%
Tampa Int'l	5%	3%
Ft. Lauderdale Int'l	2%	2%
West Palm Beach Int'l	-	-
Sarasota / Bradenton	-	<1%
Other/No Answer (NET)	5%	4%

Q2: At which Florida airport did you land?

Frequency of Using SWFL Int'l (Past Year)

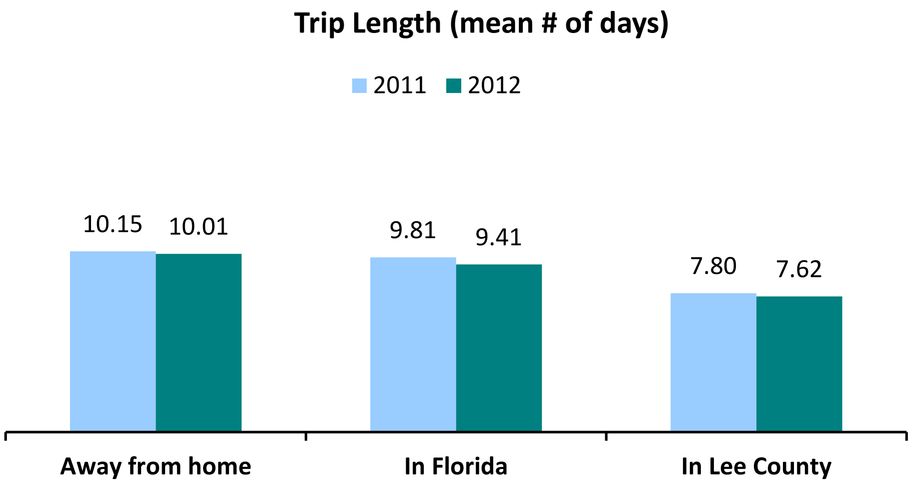
	2012
Total Respondents	**617**
One or more trips	48%
1 trip	30%
2 to 3 trips	14%
4 to 5 trips	2%
6 or more trips	2%
None/No Answer	52%

Q40. In the past year, how many trips have you taken where you used Southwest Florida International airport (Fort Myers) for your air travel? *Note: New question added in January 2012.*

Trip Profile

Trip Length Mean # of Days			
	2011	2012	% Change
	A	B	
Total Respondents	**609**	**617**	
Away from home	10.15	10.01	-1.4%
In Florida	9.81	9.41	-4.1%
In Lee County	7.80	7.62	-2.3%

Q4a/b/c: On this trip, how many days will you be:

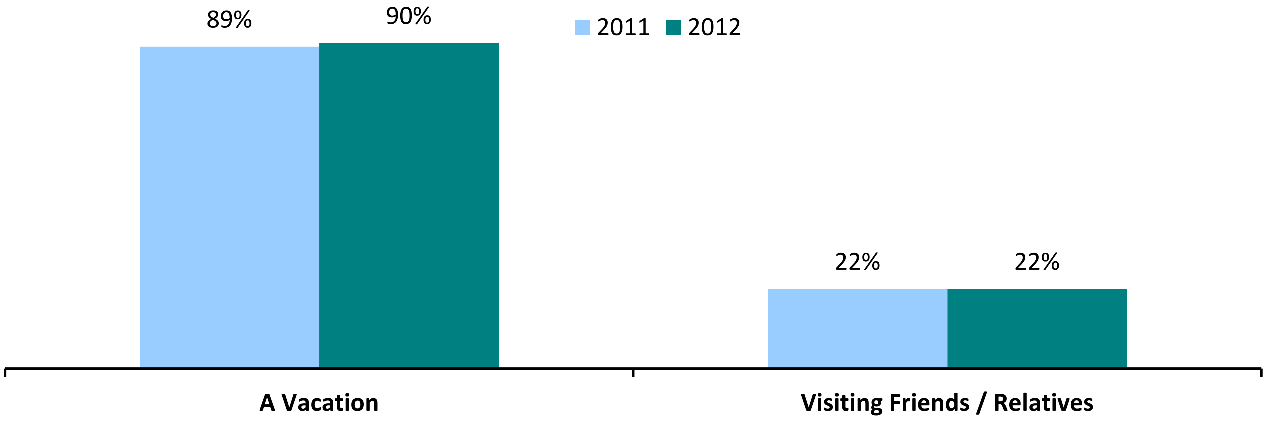


Trip Profile

Reason(s) for Visit		
	2011	**2012**
	A	**B**
Total Respondents	**609**	**617**
A Vacation	89%	90%
Visiting Friends / Relatives	22%	22%
Personal Business	2%	3%
Other Business Trip	1%	2%
Sporting Event(s)	1%	1%
A Conference/Meeting	1%	<1%
A Convention/Trade Show	<1%	<1%
Other/No Answer	2%B	1%

Q10: Did you come to our area for…(Please mark all that apply.)

Reason for September Visit



Trip Profile

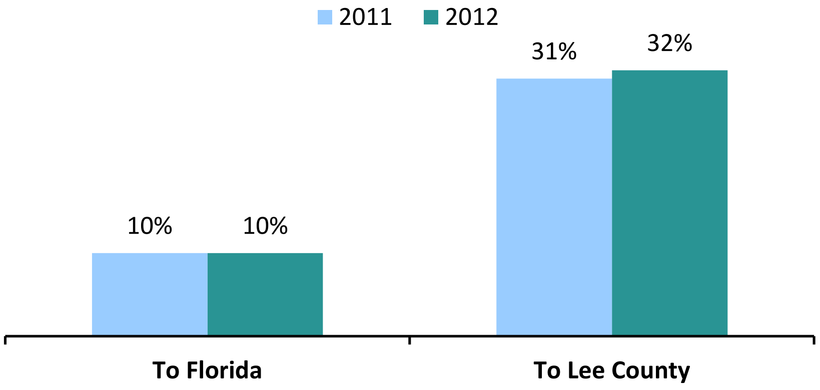
First Time Visitors to Lee County								
	Total		**Florida Residents**		**Out-of-State Residents**		**International Visitors**	
	2011	**2012**	**2011**	**2012**	**2011**	**2012**	**2011**	**2012**
	A	**B**	**A**	**B**	**A**	**B**	**A**	**B**
Total Respondents	**609**	**617**	**112**	**93**	**296**	**362**	**149**	**140**
First-time visitor	31%	32%	11%	11%	28%	32%	50%	49%
Repeat visitor	68%	67%	85%	88%	71%	68%	48%	50%
No Answer	2%	1%	4%	1%	1%	1%	2%	1%

Q15: 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		
	2011	**2012**
Total Respondents	**609**	**617**
	A	**B**
Yes, first-time visitor	10%	10%
No	70%	74%
No answer	2%	1%
*FL Residents**	18%	15%

Q13: 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 .*

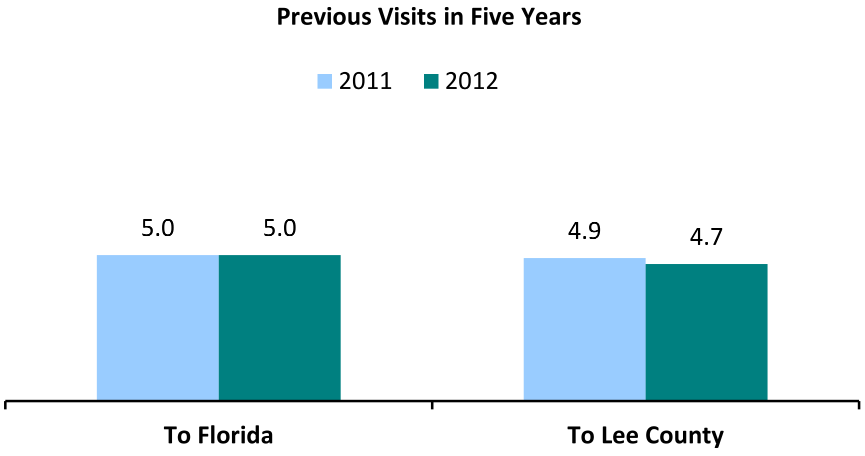
First Time Visitors



Trip Profile

Previous Visits in Five Years				
	Mean # of Visits to Florida		**Mean # of Visits to Lee County**	
	2011	**2012**	**2011**	**2012**
	A	**B**	**A**	**B**
Base: Repeat Visitors	424(FL res. Excl)	455(FL res. Excl)	412	412
Number of visits	5.0	5.0	4.9	4.7

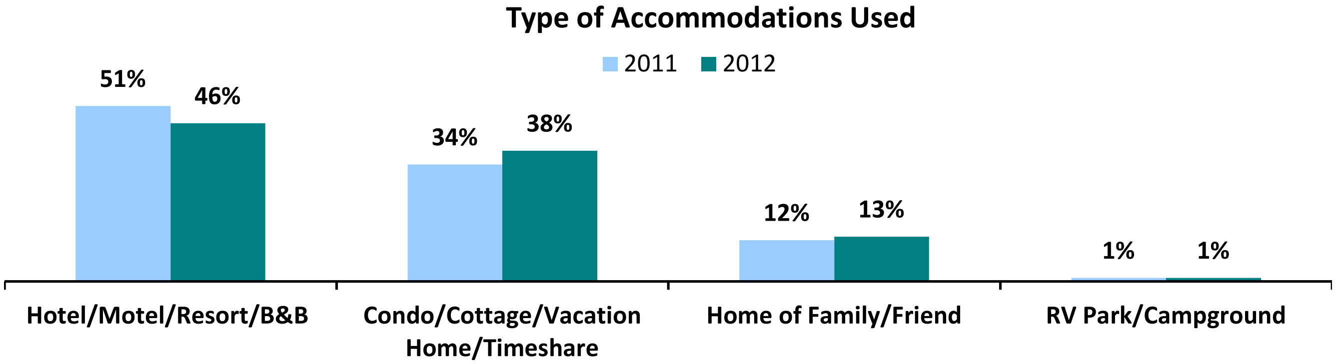
Q14: Over the past five (5) years, how many times have you visited Florida?
Q16: Over the past five (5) years, how many times have you visited Lee County?



Trip Profile

Type of Accommodations Used		
	2011	2012
	A	B
Total Respondents	**609**	**617**
Hotel/Motel/Resort/B&B (NET)	**51%**	**46%**
At a hotel/motel/historic inn	27%	23%
At a resort	23%	23%
At a Bed and Breakfast	1%	<1%
Condo/Cottage/Vacation Home/Timeshare (NET)	**34%**	**38%**
Rented home/condo	24%	26%
Owned home/condo	5%	9%A
Borrowed home/condo	5%	4%
At the home of family or a friend	**12%**	**13%**
RV Park/Campground (NET)	**1%**	**1%**
Daytripper (No Accommodations)	**1%**	**1%**

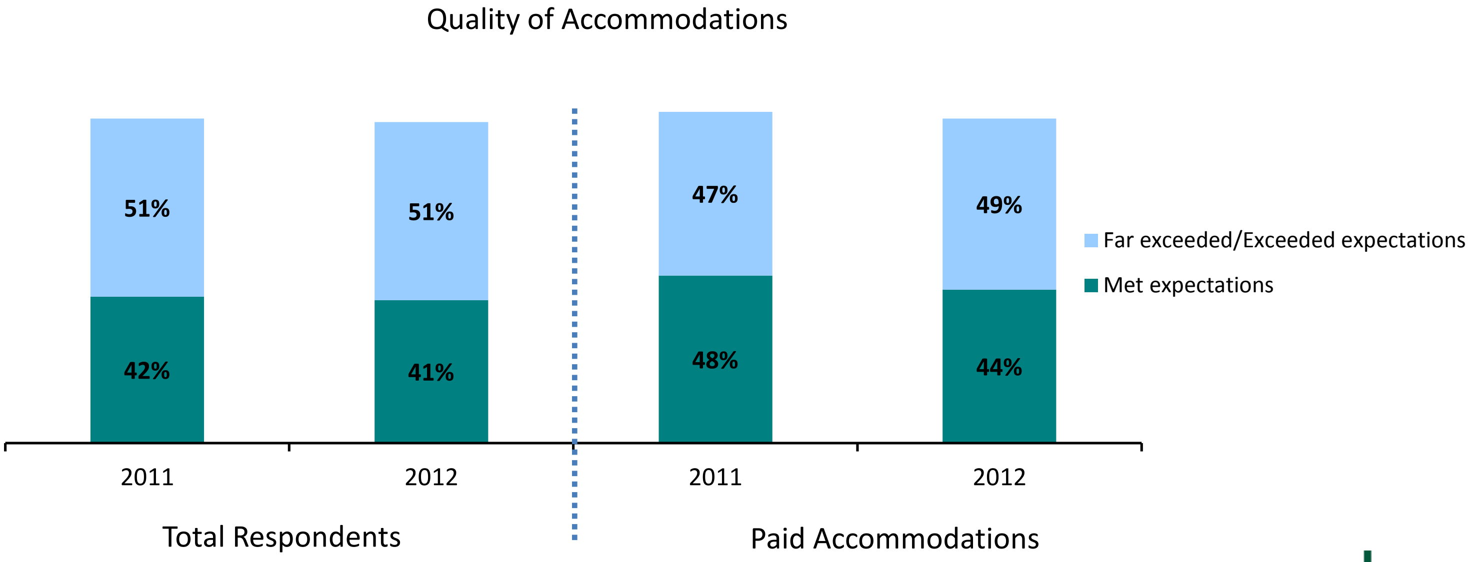
Q20: Are you staying overnight (either last night or tonight):



Trip Profile

Quality of Accommodations				
	Total Respondents		Paid Accommodations	
	2011	2012	2011	2012
	A	B	A	B
Respondents	**609**	**617**	**464**	**448**
Far exceeded/Exceeded expectations	51%	51%	47%	49%
Met your expectations	42%	41%	48%	44%
Did not meet/Far below expectations	3%	3%	3%	4%
No Answer	4%	5%	2%	3%

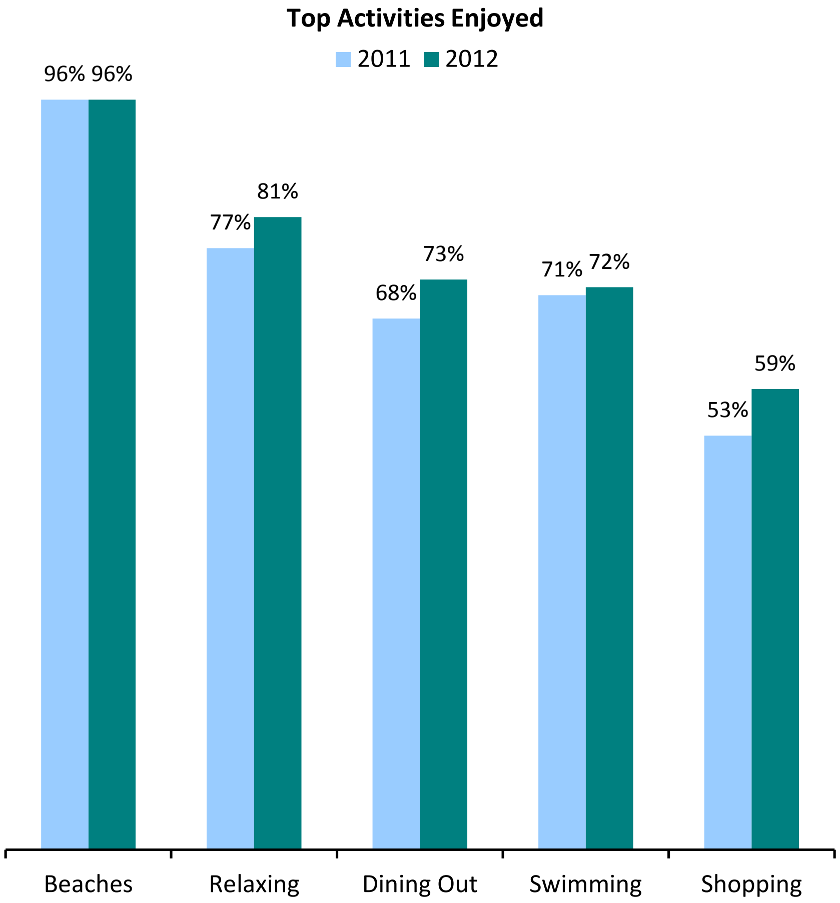
Q21: How would you describe the quality of your accommodations? Do you feel they:



Trip Activities

Activities Enjoyed		
	2011	2012
	A	B
Total Respondents	**609**	**617**
Beaches	96%	96%
Relaxing	77%	81%
Dining Out	68%	73%
Swimming	71%	72%
Shopping	53%	59%A
Shelling	40%	42%
Sightseeing	37%	34%
Attractions	26%	26%
Photography	22%	21%
Visiting Friends/Relatives	22%	21%
Watching Wildlife	22%	19%
Bars / Nightlife	15%	13%
Exercise / Working Out	14%	13%
Fishing	11%	12%
Bicycle Riding	14%	11%
Boating	10%	10%
Parasailing / Jet Skiing	11%	9%
Miniature Golf	10%	9%
Birdwatching	12%	9%
Kayaking / Canoeing	7%	7%
Guided Tour	7%	6%
Golfing	6%	6%
Cultural Events	4%	3%
Scuba Diving / Snorkeling	3%	3%
Tennis	2%	3%
Sporting Event	3%	2%
Other	2%	1%
No Answer	<1%	1%

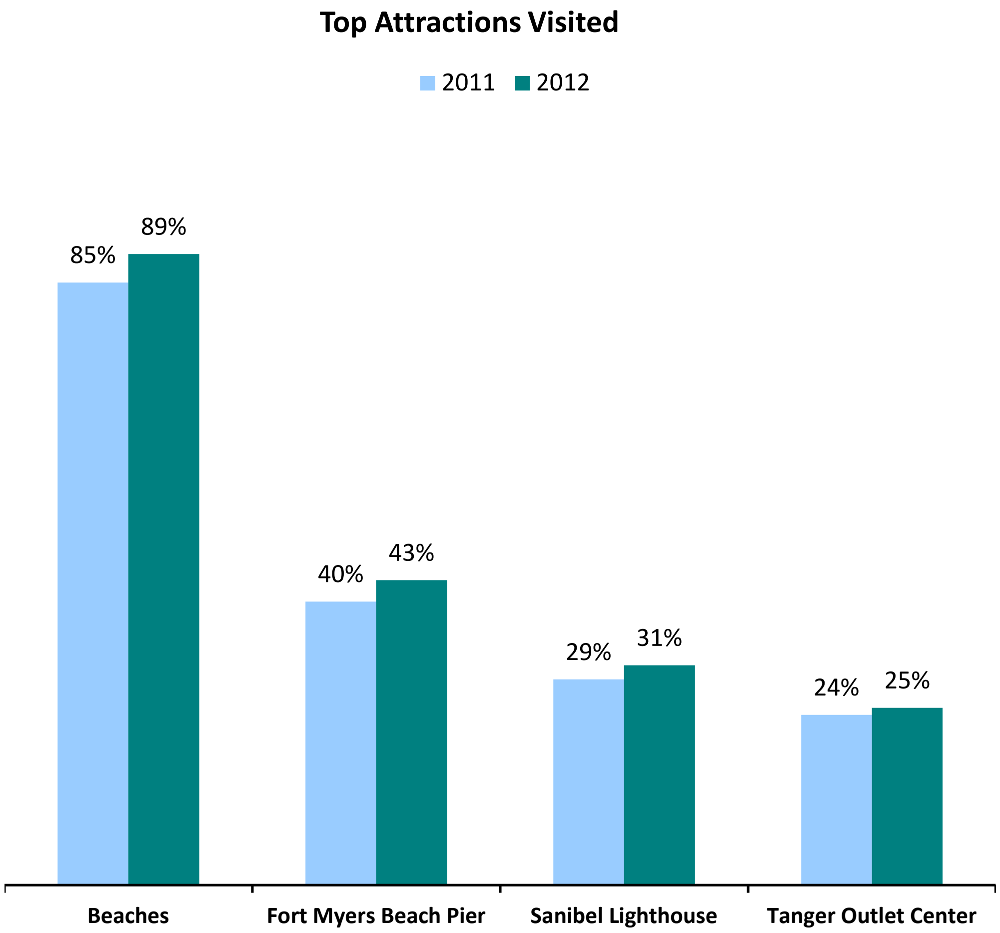
Q23: What activities or interests are you enjoying while in Lee County? *(Please mark ALL that apply.)*



Trip Activities

Attractions Visited		
	2011	2012
	A	B
Total Respondents	**609**	**617**
Beaches	85%	89%
Fort Myers Beach Pier	40%	43%
Sanibel Lighthouse	29%	31%
Tanger Outlet Center	24%	25%
Edison / Ford Estates	23%	19%
Miromar Outlets Mall	18%	17%
Periwinkle Place	15%	12%
Coconut Point Mall	11%	11%
Ding Darling National Wildlife Refuge	14%	11%
Shell Factory and Nature Park	11%	10%
Bell Tower Shops	10%	10%
Edison Mall	8%	10%
Gulf Coast Town Center	5%	8%
Bailey-Matthews Shell Museum	4%	3%
Manatee Park	3%	3%
Broadway Palm Dinner Theater	2%	1%
Babcock Wilderness Adventures	0%	1%
Barbara B. Mann Performing Arts Hall	0%	0%
Other	4%	6%
None/No Answer	1%	4%

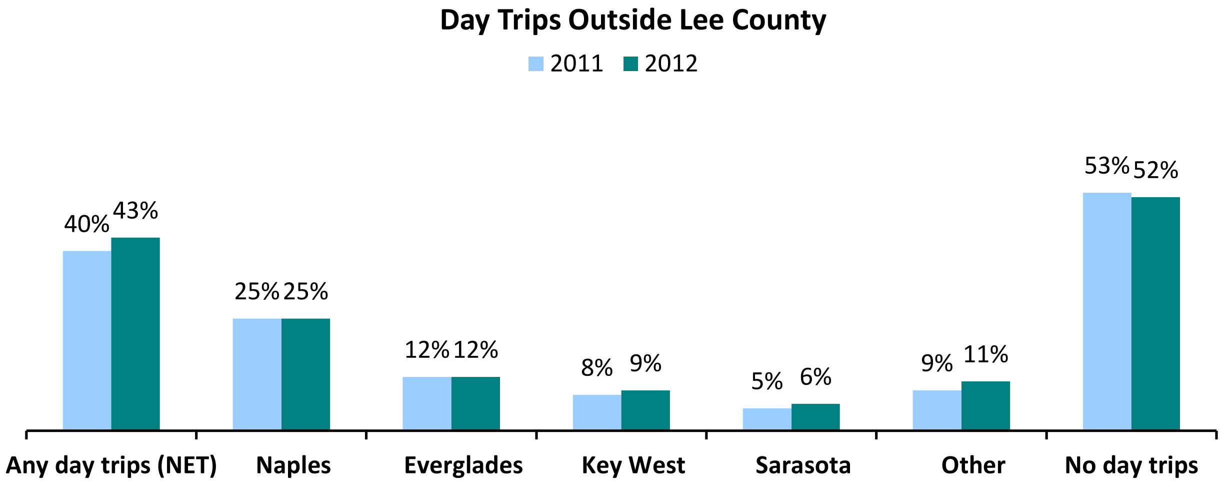
Q24. On this trip, which attractions are you visiting? *(Please mark ALL that apply.)*



Trip Activities

Day Trips Outside Lee County		
	2011	**2012**
	A	**B**
Total Respondents	**609**	**617**
Any day trips (NET)	40%	43%
Naples	25%	25%
Everglades	12%	12%
Key West	8%	9%
Sarasota	5%	6%
Other	9%	11%
No day trips	53%	52%
No Answer	13%	11%

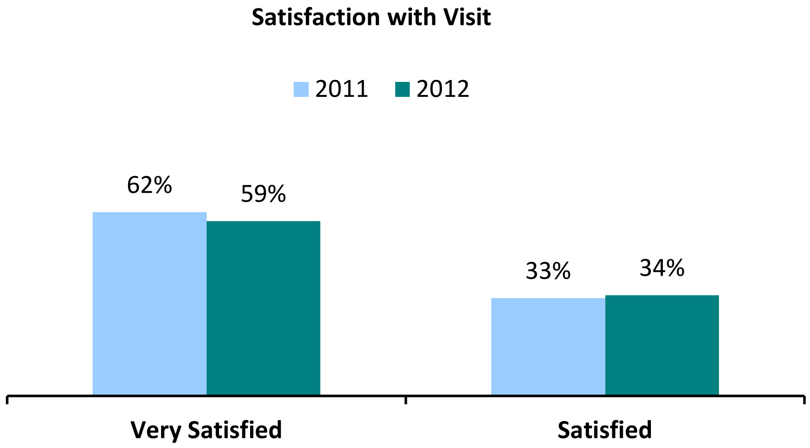
Q25: Where did you go on day trips outside Lee County?



Lee County Experience

Satisfaction with Visit		
	2011	**2012**
	A	**B**
Total Respondents	**609**	**617**
Very Satisfied/Satisfied	95%	94%
Very Satisfied	62%	59%
Satisfied	33%	34%
Neither	2%	2%
Dissatisfied/Very Dissatisfied	1%	1%
Don’t know/no answer	3%	4%

Q28: How satisfied are you with your stay in Lee County?

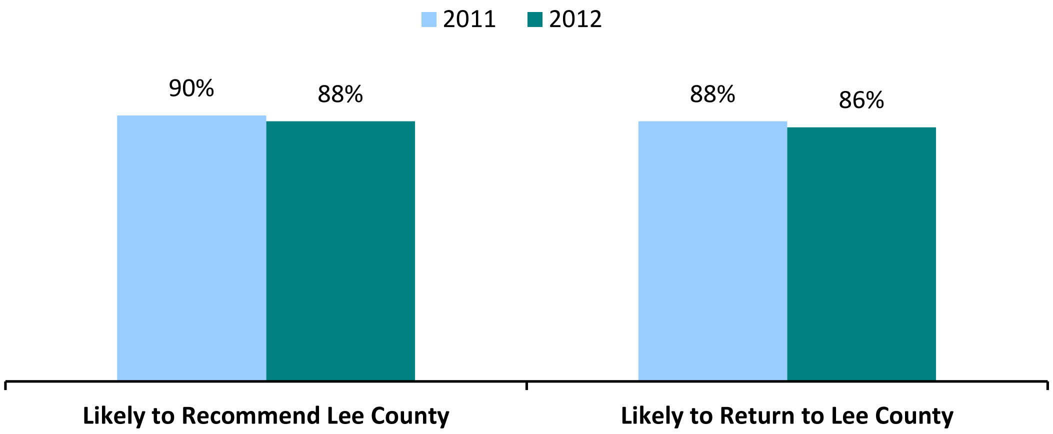


Future Plans

Likelihood to Recommend/Return to Lee County		
	2011	2012
	A	B
Total Respondents	**609**	**617**
Likely to Recommend Lee County	90%	88%
Likely to Return to Lee County	88%	86%
Base: Total Respondents Planning to Return	**534**	**533**
Likely to Return Next Year	55%	55%

Q27: Would you recommend Lee County to a friend over other vacation areas in Florida?
Q31: Will you come back to Lee County?
Q32: Will you come back next year?

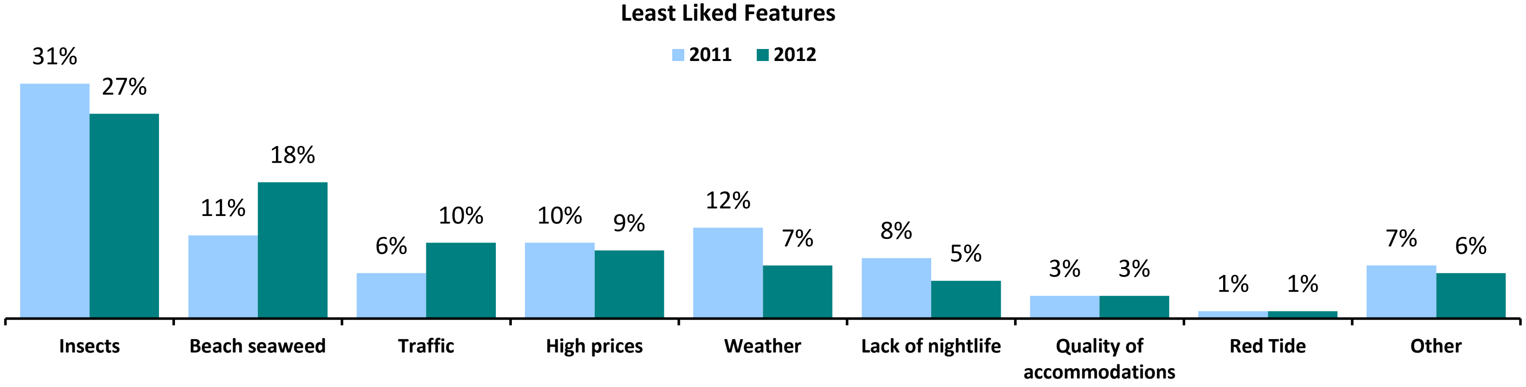
Likelihood to Recommend/Return to Lee County (Responded "Yes")



Trip Activities

Least Liked Features		
	2011	2012
	A	B
Total Respondents	**609**	**617**
Insects	31%	27%
Beach seaweed	11%	18%A
Traffic	6%	10%A
High prices	10%	9%
Weather	12%B	7%
Lack of nightlife	8%B	5%
Quality of accommodations	3%	3%
Red Tide	1%	1%
Other	7%	6%
Nothing/No Answer (NET)	37%	39%

Q29: During this specific visit, which features have you liked **LEAST** about our area? (*Please mark ALL that apply.)*

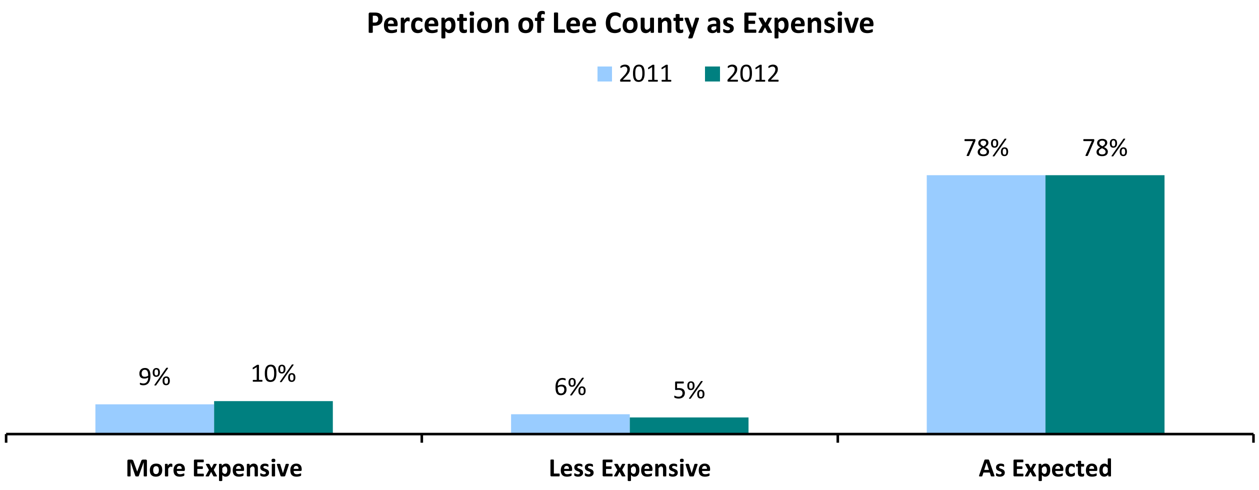


Trip Activities

Perception of Lee County as Expensive

	2011	2012
	A	B
Total Respondents	**609**	**617**
More Expensive	9%	10%
Less Expensive	6%	5%
As Expected	78%	78%
Don't know/No Answer (NET)	8%	8%

Q26: From your experience, would you say that our area is more expensive, less expensive, or as expensive as you had expected?



Visitor and Travel Party Demographic Profile

Visitor Demographic Profile

	2011	2012
	A	B
Total Respondents	**609**	**617**
Age of respondent (mean)	45.6	47.3A
Annual household income (mean)	100,951	102,362
Martial Status		
Married	72%	73%
Single	16%B	11%
Vacations per year (mean)	2.8	2.4
Short getaways per year (mean)	3.5	3.5

Q37: What is your age, please?
Q39: What is your total annual household income before taxes?
Q36. Are you: Married/Single/Other
Q33: How many vacations, lasting FIVE (5) OR MORE NIGHTS AWAY FROM HOME, do you take in an average year?
Q34: 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?

Travel Party

	2011	2012
	A	B
Total Respondents	**609**	**617**
Family	48%	49%
Couple	31%	33%
Single	6%	5%
Group of couples/friends	9%	11%
Mean travel party size	3.5	3.5
Mean adults in travel party	2.7	2.7

Q17: On this trip, are you traveling:
Q18: Including yourself, how many people are in your immediate travel party?

Travel Parties with Children

	2011	2012
	A	B
Total Respondents	**609**	**617**
Traveling with any Children (net)	37%	38%
Any younger than 6	12%	12%
Any ages 6-11	19%	18%
Any 12-17 years old	20%	23%
No Children	63%	62%

Q19: How many of those people are:
Younger than 6 years old/ 6-11 years old/ 12-17 years old/ Adults

Visitor Origin and Visitation Estimates

Total Visitation

	%		Visitor Estimates		
	2011	2012	2011	2012	% Change
Paid Accommodations	57%	55%	540,439	546,952	1.2%
Friends/Relatives	43%	45%	411,977	448,640	8.9%
Total Visitation			*952,416*	*995,592*	4.5%

Paid Accommodations Visitors

	%		Visitor Estimates		
Country of Origin	**2011**	**2012**	**2011**	**2012**	**% Change**
United States	73%	75%	393,682	410,214	4.2%
Germany	8%	9%	40,766	47,614	16.8%
UK	7%	5%	38,436	24,418	-36.5%
Canada	4%	3%	23,295	13,430	-42.3%
Scandinavia	1%	2%	6,988	12,209	74.7%
France	2%	2%	10,483	8,546	-18.5%
BeNeLux	2%	1%	8,153	6,104	-25.1%
Latin America	<1%	1%	2,329	3,663	57.2%
Switzerland	1%	1%	6,988	3,663	-47.6%
Ireland	1%	<1%	3,494	2,442	-30.1%
Austria	1%	-	3,494	-	-
Other International	<1%	2%	2,329	12,209	424.2%
No Answer	-	<1	-	2,442	-

U.S. Region of Origin	2011	2012	2011	2012	% Change
Florida	29%	22%	114,144	89,124	-21.9%
South (including Florida)	46%	39%	180,535	158,714	-12.1%
Midwest	28%	37%	109,485	151,389	38.3%
Northeast	16%	18%	62,896	75,694	20.3%
West	1%	2%	4,659	9,767	109.6%
No Answer	9%	4%	36,107	14,651	-59.4%

< > indicates a significant difference between 2011 and 2012 responses at the 95% confidence level.

2012 Top DMAs (Paid Accommodations)

Miami-Fort Lauderdale	8.3%	34,185
New York	6.3%	25,638
Tampa-Saint Petersburg (Sarasota)	5.1%	20,755
West Palm Beach-Fort Pierce	4.5%	18,313
Cincinnati	3.9%	15,871
Saint Louis	3.9%	15,871
Chicago	3.6%	14,651
Columbus, OH	3.0%	12,209
Cleveland-Akron (Canton)	3.0%	12,209
Indianapolis	2.7%	10,988
Pittsburgh	2.7%	10,988

Note: The percentage of visitors by origin market is based on data collected from visitors in the Visitor Profile Survey.

Occupancy Data Analysis

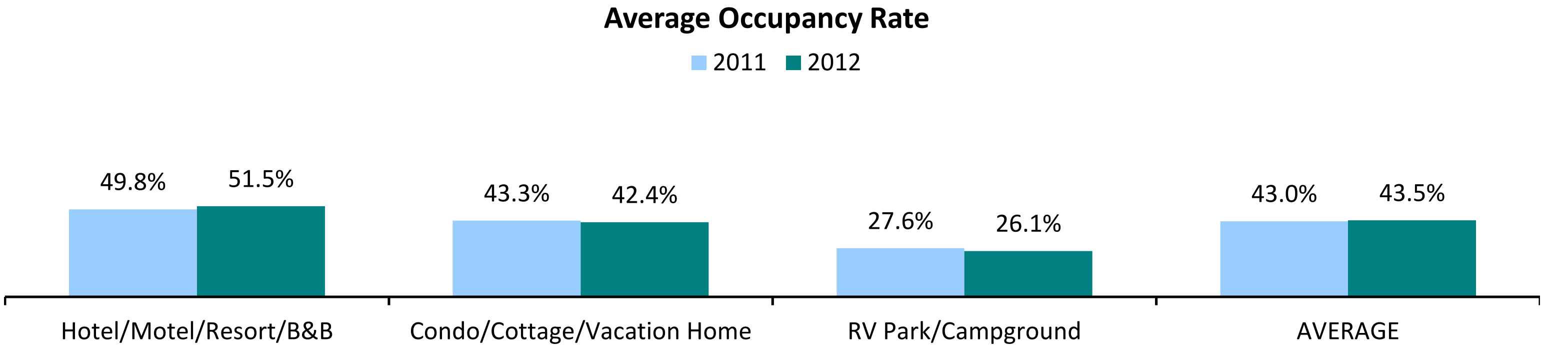
Summer 2012

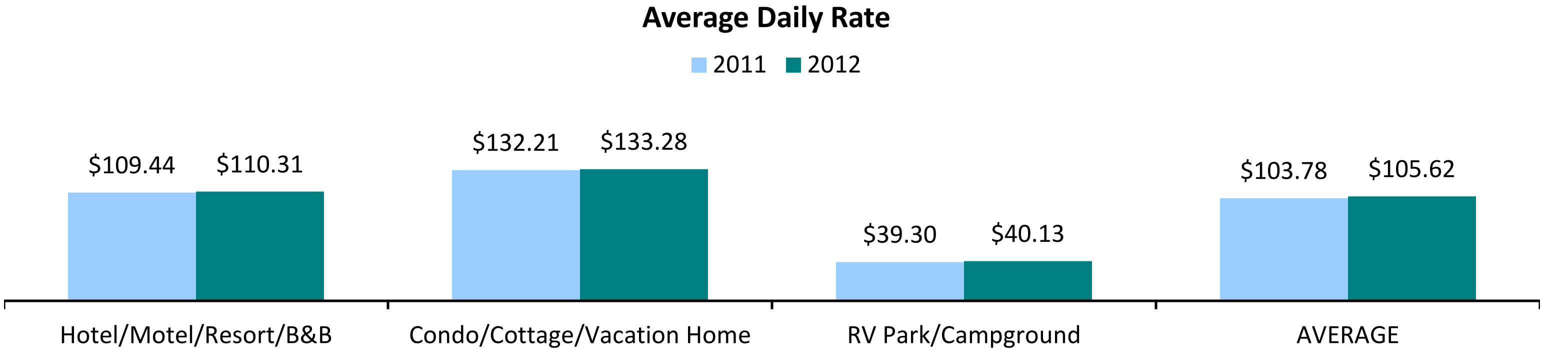
Property managers were interviewed each month during the 2011 and 2012 Summer seasons to provide data for that specific month. Results shown on the following pages are a combination of the samples interviewed in each of the three Summer months during 2011 and 2012. Therefore, base sizes shown do not reflect total number of properties but rather total number of completed interviews, as most properties participated during two or more months.

Occupancy/Daily Rates

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2011	**2012**	**% Change**	**2011**	**2012**	**% Change**	**2011**	**2012**	**% Change**
Property Managers Responding	**313**	**297**		**314**	**297**		**313/314**	**297/297**	
Hotel/Motel/Resort/B&B	49.8%	51.5%	3.4%	$109.44	$110.31	0.8%	$54.51	$56.86	4.3%
Condo/Cottage/Vacation Home	43.3%	42.4%	-2.1%	$132.21	$133.28	0.8%	$57.21	$56.49	-1.3%
RV Park/Campground	27.6%	26.1%	-5.4%	$39.30	$40.13	2.1%	$10.86	$10.47	-3.6%
AVERAGE	**43.0%**	**43.5%**	**1.2%**	**$103.78**	**$105.62**	**1.8%**	**$44.58**	**$45.90**	**3.0%**

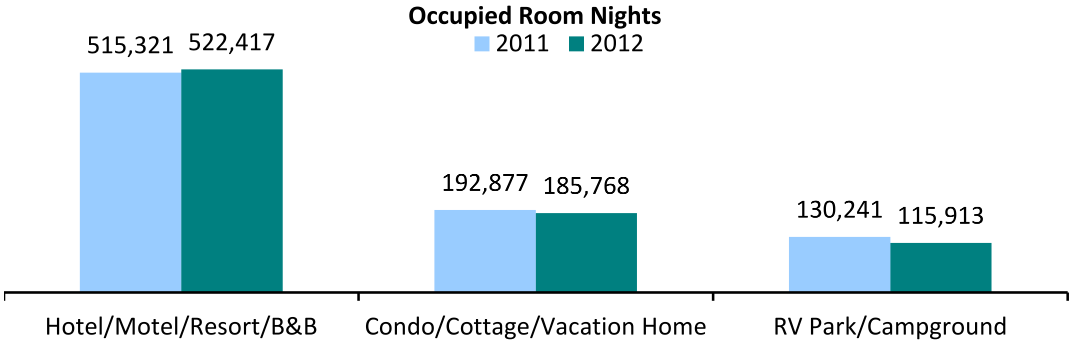
Q16: What was your overall average occupancy rate for the month of [July/August/September]?
Q17: What was your average daily rate (ADR) in [July/August/September]?

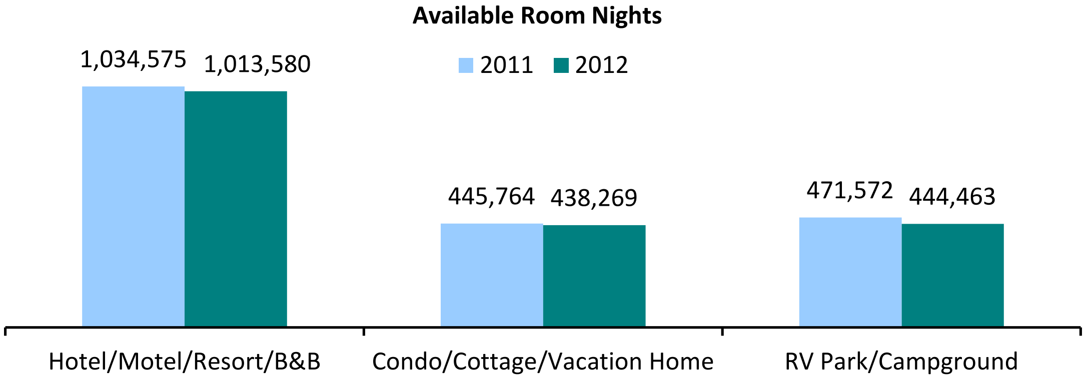




Room/Unit/Site Nights

	Occupied Room Nights			Available Room Nights		
	2011	2012	% Change	2011	2012	% Change
Hotel/Motel/Resort/B&B	515,321	522,417	1.4%	1,034,575	1,013,580	-2.0%
Condo/Cottage/Vacation Home	192,877	185,768	-3.7%	445,764	438,269	-1.7%
RV Park/Campground	130,241	115,913	-11.0%	471,572	444,463	-5.8%
Total	**838,439**	**824,098**	**-1.7%**	**1,951,911**	**1,896,312**	**-2.8%**

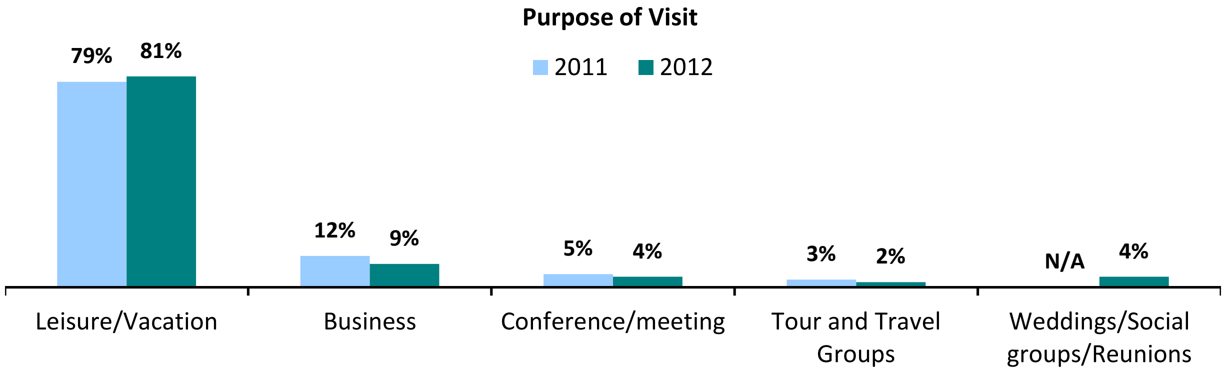




Lodging Management Estimates

Guest Profile		
	2011	2012
	A	B
Property Managers Responding	**282**	**271**
Purpose of Visit		
Leisure/Vacation	79%	81%
Business	12%	9%
Conference/meeting	5%	4%
Tour and Travel Groups	3%	2%
Weddings/Social groups/Reunions (net)	N/A	4%
Property Managers Responding	**299**	**275**
Average guests per room	2.5	2.7
Property Managers Responding	**296**	**273**
Average length of stay in nights	4.9	5.1

Q22: What percent of your [July/August/September] room/site/unit occupancy do you estimate was generated by:
Q18: What was your average number of guests per room/site/unit in [July/August/September]?
Q19: What was the average length of stay (in nights) of your guests in [July/August/September]?

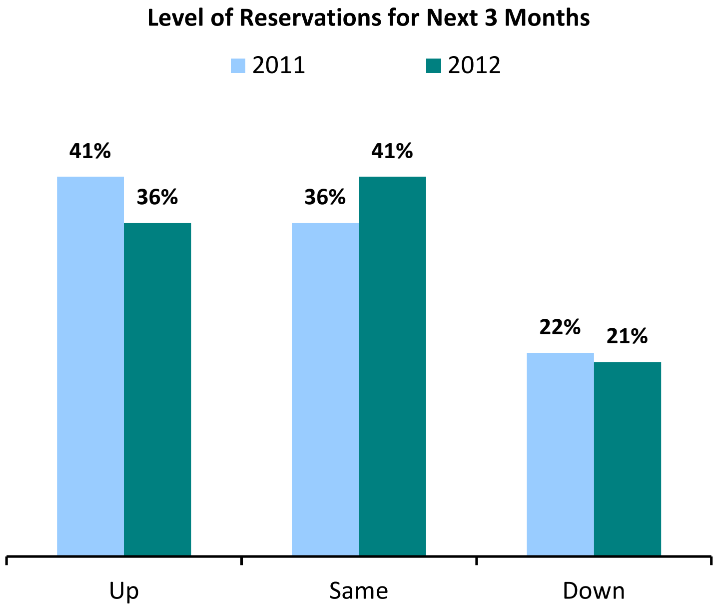


Occupancy Barometer

Level of Reservations for Next 3 Months Compared to Last Year

	2011	**2012**
	A	**B**
Total Respondents	**306**	**295**
Up/Same (net)	76%	77%
Up	41%	36%
Same	36%	41%
Down	22%	21%

Q24: Compared to [next three months] of one year ago, is your property's total level of reservations up, the same or down for the upcoming [next three months]?

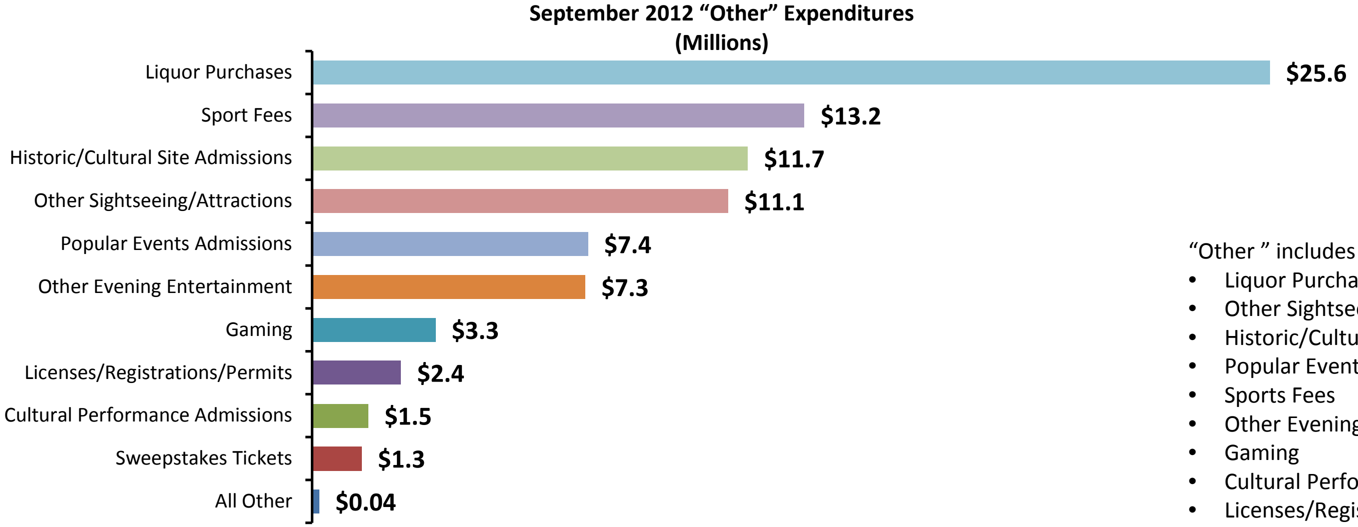


Economic Impact Analysis

Summer 2012

Total Visitor Expenditures by Spending Category

TOTAL EXPENDITURES			
	2011	2012	% Change
TOTAL	$455,454,655	$457,496,167	0.4%
Food and Beverages	$126,075,025	$124,944,457	-0.9%
Shopping	$116,150,190	$120,150,017	3.4%
Lodging Accommodations	$87,015,618	$87,039,117	0.0%
Ground Transportation	$44,444,915	$40,390,098	-9.1%
Other	$81,768,907	$84,972,478	3.9%



“Other ” includes the following categories:

- Liquor Purchases
- Other Sightseeing/Attractions
- Historic/Cultural Site Admissions
- Popular Events Admissions
- Sports Fees
- Other Evening Entertainment
- Gaming
- Cultural Performance Admissions
- Licenses/Registrations/Permits
- Sweepstakes Tickets
- All Other

Total Visitor Expenditures by Lodging Type

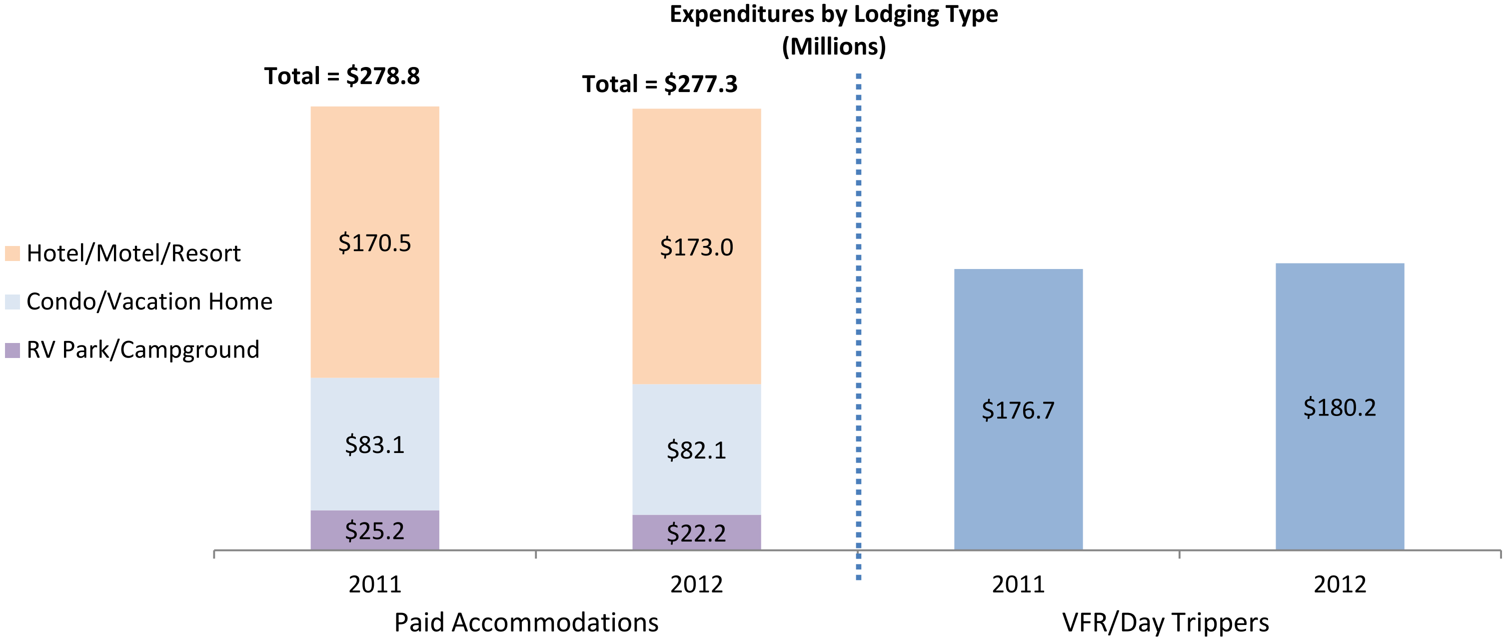
TOTAL EXPENDITURES						
	Staying Paid Accommodations			Visiting Friends and Relatives/Day Trippers		
	2011	2012	% Change	2011	2012	% Change
TOTAL	$278,762,469	$277,271,867	-0.5%	$176,692,186	$180,224,300	2.0%
Lodging Accommodations	$87,015,618	$87,039,117	-	$0	$0	-
Food and Beverages	$65,595,435	$65,459,699	-0.2%	$60,479,590	$59,484,758	-1.6%
Shopping	$62,696,564	$62,014,783	-1.1%	$53,453,626	$58,135,234	8.8%
Ground Transportation	$21,026,779	$21,778,238	3.6%	$23,418,136	$18,611,860	-20.5%
Other	$42,428,073	$40,980,030	-3.4%	$39,340,834	$43,992,448	11.8%

“Other ” includes the following categories:

- Liquor Purchases
- Other Sightseeing/Attractions
- Historic/Cultural Site Admissions
- Popular Events Admissions
- Sports Fees
- Other Evening Entertainment
- Gaming
- Cultural Performance Admissions
- Licenses/Registrations/Permits
- Sweepstakes Tickets
- All Other

Total Visitor Expenditures by Lodging Type

Total Expenditures by Lodging Type					
	2011	**2012**	**% Change**	**2011**	**2012**
TOTAL	$455,454,655	$457,496,167	0.4%	100%	100%
Visiting Friends & Relatives/Day Trippers	$176,692,186	$180,224,300	2.0%	39%	39%
Paid Accommodations	$278,762,469	$277,271,867	-0.5%	61%	61%
Hotel/Motel/Resort/B&B	*$170,496,146*	*$172,959,854*	1.4%	37%	38%
Condo/Cottage/Vacation Home	*$83,077,703*	*$82,118,932*	-1.2%	18%	18%
RV Park/Campground	*$25,188,620*	*$22,193,081*	-11.9%	6%	5%



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

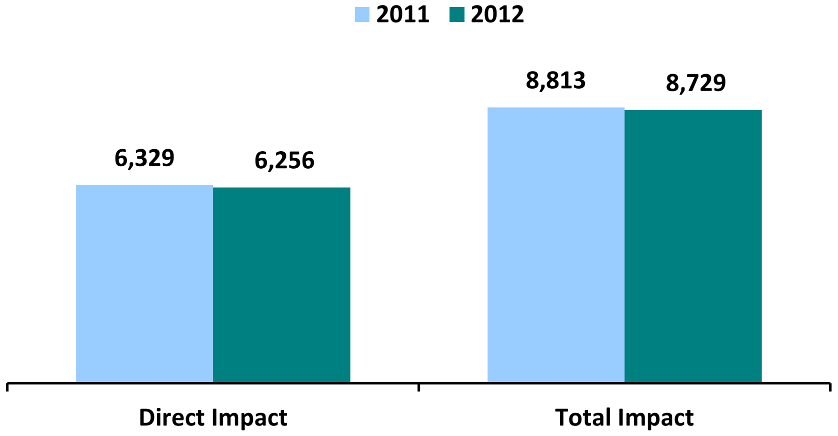
In order to produce the output (food, lodging, entertainment, etc.) purchased by visitors, businesses have to employ people.

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.).

Resident Employment Impact
Summer (July - September)



Impact on Household Income for Lee County Residents

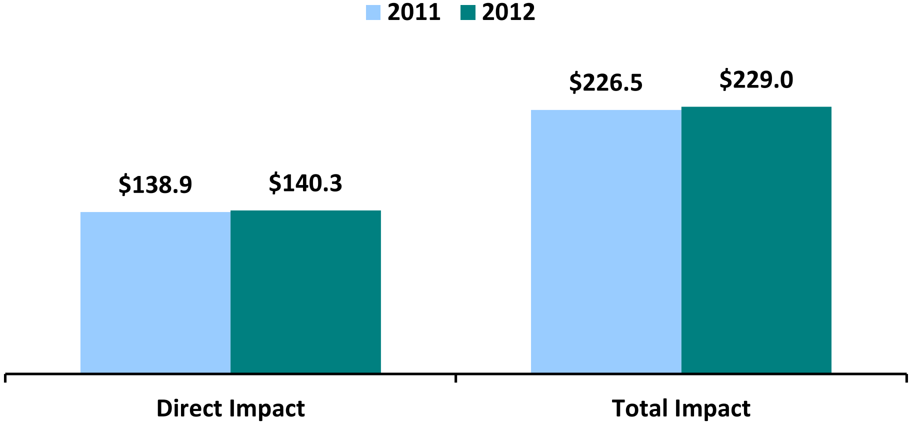
As stated earlier, in order to produce the output (food, lodging, entertainment, etc.) purchased by visitors, businesses have to employ people. This requires business owners to pay wages and salaries to their employees, and also includes proprietary income for the business owner in some cases.

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.).

Resident Household Income Impact (Millions $)
Summer (July - September)



Impact on State and Local Government Revenues

In producing and selling any goods and services purchased by visitors, both local and state revenues are collected by local and state governments.

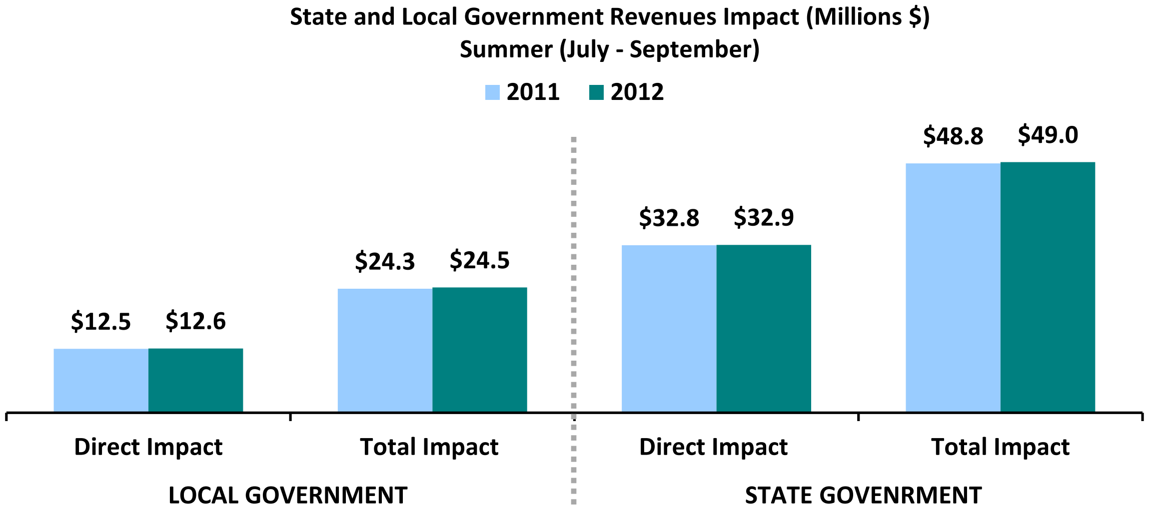
The gross government revenues accruing to governments as a result of producing the output purchased with visitor expenditures is the government revenue impact.

Local government revenue impact is a result of revenues provided to the local (Lee County) government. This includes the bed tax, local property tax, any local-option sales tax, and any operating income for local government agencies.

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

The following are included in government revenues as appropriate for the local area; gasoline taxes, vehicle licenses and registrations, boat registrations, hunting and fishing licenses, liquor taxes, local and state park user fees, etc.

Tax ratios used to calculate these government revenue impacts are adjusted to conform to data reported in State and Local Government Finance Data (SLGF, Bureau of the Census).



Appendix

Summer 2012

July 2012 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Fort Myers	RSW Airport	7/7/2012	26
Fort Myers Beach	Estero Island Beach Club	7/9/2012	9
Fort Myers Beach	Neptune Inn	7/9/2012	6
Fort Myers Beach	Diamond Head Resort	7/9/2012	10
Sanibel	Holiday Inn	7/12/2012	9
Sanibel	Coquina Beach Club	7/12/2012	9
Sanibel	Sundial Resort	7/12/2012	10
Bonita Springs	Bonita Beach	7/14/2012	27
Cape Coral	Cape Coral Yacht Club	7/14/2012	5
Fort Myers Beach	Best Western	7/20/2012	7
Fort Myers Beach	Winward Passage	7/20/2012	5
Fort Myers Beach	Pink Shell Resort	7/20/2012	7
Fort Myers Beach	The Pier	7/20/2012	7
Fort Myers	Edison Home	7/21/2012	13
Fort Myers	Edison Home	7/24/2012	13
Sanibel	Sanibel Beach Club	7/26/2012	6
Sanibel	Periwinkle Campgroud	7/26/2012	4
Sanibel	Lighthouse Beach	7/26/2012	11
Fort Myers	Centenial Park	7/28/2012	10
Fort Myers	Clarion	7/28/2012	6
North Fort Myers	Shell Factory	7/28/2012	8
Total			**208**

August 2012 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Fort Myers Beach	Diamond Head Resort	8/1/12	11
Fort Myers Beach	Estero Beach Club	8/1/12	10
Fort Myers Beach	Neptune Resort	8/1/12	5
Fort Myers	RSW Airport	8/4/12	25
Bonita Springs	Bonita Beach	8/10/12	25
Cape Coral	Cape Coral Yacht Club	8/10/12	6
Sanibel	Island Beach Club	8/13/12	5
Sanibel	Sanibel Cottages	8/13/12	5
Sanibel	Pointe Santo	8/13/12	11
Fort Myers	Edison Estates	8/16/12	14
Fort Myers	Shell Factory	8/18/12	5
Fort Myers	Centenial Park	8/18/12	9
Fort Myers	Hilton Garden Inn	8/18/12	5
Sanibel	Ocean’s Reach	8/20/12	11
Sanibel	Lighthouse Beach	8/20/12	9
Sanibel	Casa Ybel	8/20/12	10
Fort Myers	Edison Estates	8/22/12	15
Fort Myers Beach	Times Square	8/24/12	9
Fort Myers Beach	Pink Shell Resort	8/24/12	8
Fort Myers Beach	Best Western	8/24/12	7
Total			**205**

September 2012 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Fort Myers	RSW Airport	9/1/12	25
Bonita Springs	Bonita Beach	9/4/12	25
Fort Myers Beach	Estero Beach Club	9/6/12	9
Fort Myers Beach	Neptune Inn	9/6/12	6
Fort Myers Beach	Diamond Head Resort	9/6/12	7
Sanibel	Holiday Inn	9/12/12	10
Sanibel	Sundial Resort	9/12/12	8
Sanibel	Lighthouse Beach	9/12/12	8
Fort Myers	Edison Estates	9/14/12	11
Sanibel	Sanibel Inn	9/18/12	7
Sanibel	Sanibel Moorings	9/18/12	6
Sanibel	Sanibel Arms	9/18/12	6
Sanibel	Lighthouse Beach	9/18/12	5
Fort Myers Beach	Best Western	9/21/12	10
Fort Myers Beach	Windward Passage	9/21/12	6
Fort Myers Beach	Pink Shell Resort	9/21/12	10
Fort Myers	Edison Estates	9/26/12	15
Fort Myers	Hilton Garden Inn	9/28/12	7
Cape Coral	Cape Coral Yacht Club	9/28/12	5
Fort Myers	Centennial Park	9/29/12	10
North Fort Myers	Shell Factory	9/29/12	8
Total			**204**

Occupancy Interviewing Statistics

Interviews were conducted during the first two weeks of the month for the prior months' data during the season. The table below provides the number of participating properties each month. As noted, many property managers participated in two or three months.

Lodging Type	Summer 2012 Number of Interviews		
	July	August	September
Hotel/Motel/Resort/B&Bs	59	71	64
Condo/Cottage/Vacation Home/Timeshare	26	25	25
RV Park/Campground	9	17	15
Total	**94**	**113**	**104**