



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

**July 2012 Visitor Profile and Occupancy Analysis
September 14, 2012**

Prepared for:

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

Prepared by:



Executive Summary July 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 July 2012, Lee County hosted 225,200 visitors staying in paid accommodations and 176,400 staying with friends or relatives while visiting, for a total of about 402,000 visitors.
- July 2012 visitation among paid accommodations guests was down 7.6% from 2011 but surpassed estimates for July 2010. In contrast, visitation among those staying with friends or relatives was up 15.8% year-over-year. As a result, the total number of visitors during July 2012 was 1.4% higher than the prior year.

Estimated Visitation	2011	2012	% Change
Paid Accommodations	243,695	225,229	-7.6%
Friends/Relatives	152,408	176,438	+15.8%
Total Visitation	396,103	401,667	+1.4%

Visitor Expenditures

- July 2012 visitors spent an estimated \$203 million during their stay – just about the same as estimated total spending for July 2011 (+0.3%).
- Paid accommodations guests contributed \$116 million – a 57% share of the total. Those visiting friends and relatives added another \$87 million. Spending among both visitor segments was on par with levels estimated for July 2011.

Estimated Expenditures	2011	2012	% Change
Paid Accommodations	\$116,027,393	\$116,365,154	+0.3%
Friends/Relatives	\$86,800,791	\$86,975,953	+0.2%
Total Expenditures	\$202,828,184	\$203,341,107	+0.3%

Visitor Origin

- Three-quarters of July 2012 visitors staying in paid accommodations were U.S. residents (76%) – about the same incidence as last year (79%). Germany and the UK delivered the largest numbers of international visitors staying in paid accommodations. As was the case during the first half of 2012, Lee County experienced year-over-year growth in German visitation during July but saw some falloff in Canadian visitation.
- Slightly fewer than half of July 2012 domestic paid accommodations guests came from the Midwest (44%) and nearly as many from the South (38%), particularly from Florida. Only one in ten were from the Northeast and very few from the West.
- Miami was the top domestic feeder market for the Lee County lodging industry in July 2012, with Cincinnati and Saint Louis ranking second and third for contributing paid accommodations guests.

2012 Top DMAs (Paid Accommodations)

	%	Estimates
Miami-Fort Lauderdale	9%	15,107
Cincinnati	6%	9,613
Saint Louis	5%	8,240
Youngstown	4%	6,867
Kansas City	4%	6,867
Columbus, OH	4%	6,867
West Palm Beach-Fort Pierce	4%	6,867
Cleveland-Akron	4%	6,867
Lexington	3%	5,493
Chicago	3%	5,493
Tampa-Saint Petersburg	3%	5,493

Visitors Staying in Paid Accommodations

Country of Origin	%		Visitor Estimates		% Change
	2011	2012	2011	2012	
United States	79%	76%	191,845	170,295	-11.2%
Germany	1%	7%	3,457	16,480	376.8%
UK	4%	6%	10,370	13,733	32.4%
Scandinavia	3%	3%	6,913	6,867	-0.7%
Canada	4%	2%	10,370	5,493	-47.0%
Latin America	1%	1%	1,728	2,747	58.9%
France	1%	1%	1,728	1,373	-20.5%
BeNeLux	2%	1%	5,185	1,373	-73.5%
Ireland	1%	1%	1,728	1,373	-20.5%
Switzerland	3%	0%	6,913	-	-
Austria	1%	0%	1,728	-	-
Other Europe	1%	1%	1,728	2,747	58.9%
No Answer	-	1%	-	2,747	-

Visitors Staying in Paid Accommodations

U.S. Region of Origin	%		Visitor Estimates		% Change
	2011	2012	2011	2012	
Florida	31%	20%	58,763	34,334	-41.6%
South (including Florida)	<50%>	38%	96,787	64,547	-33.3%
Midwest	25%	<44%>	48,393	75,534	56.1%
Northeast	15%	13%	29,382	21,974	-25.2%
West	1%	3%	1,728	5,493	217.8%
No Answer	8%	2%	15,555	4,120	-73.5%

< > 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 July 2012 visitors was similar in length to that of July 2011 visitors. At least half said they started talking about, chose, and made reservations for their Lee County trip three or more months in advance.
 - 74% started talking about trip in that timeframe (vs. 67% July 2011)
 - 66% chose Lee County for trip (vs. 60% July 2011)
 - 55% made lodging reservation (vs. 48% July 2011)
- Use of the internet while planning their Lee County trip continued to be prevalent among July 2012 visitors, with many claiming to have visited one or more websites (86%). Visitors most often mentioned using search engine and airline websites (38% and 36% respectively). While computers were still the most frequently mentioned way visitors said they typically access online destination planning information, four in ten visitors indicated they use a smartphone (41%).
- When talking about coming to Lee County, the attributes that received the highest ratings among July 2012 visitors with regard to influencing their selection were:
 - *Peaceful/relaxing* (87%),
 - *Warm weather* (82%),
 - *White sandy beaches* (80%),
 - *A safe destination* (76%), and
 - *Clean, unspoiled environment* (76%).

Visitor Profile

- Almost two-thirds of July 2012 visitors arrived by plane when traveling to the area (63%), whereas only half of July 2011 visitors claimed they flew (49%). Most of those who flew came through Southwest Florida International Airport (77%) – the same pattern observed among their 2011 counterparts.
- About half of visitors interviewed indicated they were staying in hotel/motel/resorts (48%) during their trip. Four in ten said they were staying in a condo/vacation home property (38%). Half of those staying in paid accommodations reported that the quality *far exceeded or exceeded expectations* (52%).
- The top activities visitors enjoyed in Lee County during June 2012 were beaches (96%), relaxing (78%), swimming (70%), dining out (70%), and shopping (63%).

Visitor Profile (cont'd)

- Overall, visitor satisfaction remains extremely high – nine in ten June 2012 visitors reported being *very satisfied* (57%) or *satisfied* (36%) with their visit. Eight in ten indicated they are likely to return to Lee County (83%), half of whom claimed they will return next year (53%). The majority also said they will recommend Lee County to a friend over other areas in Florida (88%).
- When asked what they disliked about the Lee County area, about one quarter of July 2012 visitors reported *beach seaweed* (27%) or *insects* (24%) as bothersome. In contrast, *insects* ranked highest as a concern among July 2011 visitors, receiving 40% of responses – likely the result of last summer being a particularly bad mosquito season.
- The demographic composition of July 2012 visitors can be summarized as follows:
 - 47 years of age on average
 - \$105,600 household income on average
 - 75% married
 - 56% traveling as a family
 - 27% traveling as a couple
 - 49% traveling *with* children
 - 4 people in travel party on average

Lodging Industry Assessments

- For the Lee County lodging industry in total, *available* room nights declined 4.3% from July 2011 to 2012 but *occupied* room nights only fell 1.8%. Hotel/motel/resort properties fared the best, having an increase in *occupied* room nights coupled with a decrease in *available* room nights. Condos/vacation homes had no change in their *available* room nights but did have a decline in *occupied* room nights. For RV park/campground properties, the rate of decline in *occupied* room nights was greater than that of *available* room nights.

	Occupied Room Nights			Available Room Nights		
	2011	2012	% Change	2011	2012	% Change
Hotel/Motel/Resort/B&B	206,709	213,865	3.5%	353,617	344,653	-2.5%
Condo/Cottage/Vacation Home	82,242	81,163	-1.3%	149,389	150,319	0.6%
RV Park/Campground	54,441	42,310	-22.3%	171,058	150,350	-12.1%
Total	343,392	337,338	-1.8%	674,064	645,322	-4.3%

- The result of these supply and demand shifts was an increase in the industry-wide average occupancy rate in Lee County – from 50.9% in July 2011 to 52.3% in July 2012 (+2.6%), buoyed by growth in occupancy rate for the hotel/motel/resort category (+6.2%). However, condos/vacation homes and RV parks/campgrounds saw average occupancy rate drop (-1.9% and -11.6% respectively) due to waning room night demand.
- Additionally, Lee County’s average daily rate was up versus last July, rising from \$109.01 to \$112.26 (+3.0%). Both the hotel/motel/resort and RV park/campground categories saw growth in ADR, while condos/vacation homes felt a very slight contraction.
- There was a 5.7% gain in RevPAR for July year-over-year. Strong RevPAR performance among hotels/motels/resorts (+7.5%) was dampened by weaker performance among condos/vacation homes (-2.8%) and RV parks/campgrounds (-10.3%).

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
Property Managers Responding	109	89		109	89		109/109	89/89	
Hotel/Motel/Resort/B&B	58.5%	62.1%	6.2%	\$114.08	\$115.54	1.3%	\$66.69	\$71.69	7.5%
Condo/Cottage/Vacation Home	55.1%	54.0%	-1.9%	\$143.50	\$142.23	-0.9%	\$79.00	\$76.79	-2.8%
RV Park/Campground	31.8%	28.1%	-11.6%	\$37.62	\$38.18	1.5%	\$11.97	\$10.74	-10.3%
AVERAGE	50.9%	52.3%	2.6%	\$109.01	\$112.26	3.0%	\$55.53	\$58.68	5.7%

Lodging Industry Assessments (cont'd)

- Lee County property managers' optimism about projected reservations in the coming months was about the same as was reported this time last year. A sizeable minority of managers responding reported that their total level of reservations for the next three months (August, September, and October) are up over the same period the prior year (44%) – the same as in 2011 (45%). Another third said reservations for the next three months of 2012 are at least the same as the same time last year (35% vs. 36% July 2011), and slightly fewer than 20% claimed that their reservations are down for the next three months (18% vs. 17% July 2011).

July 2012 Lee County Snapshot

Total Visitation				
	%		Visitor Estimates	
	2011	2012	2011	2012
Paid Accommodations	62%	56%	243,695	225,229
Friends/Relatives	38%	44%	152,408	176,438
<i>Total Visitation</i>			396,103	401,667

Total Visitor Expenditures			
	2011	2012	% Change
Total Visitor Expenditures	\$202,828,184	\$203,341,107	+0.3%
Paid Accommodations	\$116,027,393	\$116,365,154	+0.3%

Visitor Origin - Visitors Staying in Paid Accommodations				
	%		Visitor Estimates	
	2011	2012	2011	2012
Florida	31%	20%	58,763	34,334
United States	79%	76%	191,845	170,295
Germany	1%	7%	3,457	16,480
UK	4%	6%	10,370	13,733
Canada	4%	2%	10,370	5,493
Other International	11%	7%	27,653	16,480
No Answer	-	1%	-	2,747

Average Per Person Per Day Expenditures		
2011	2012	% Change
\$108.59	\$112.85	+3.9%

First-Time/Repeat Visitors to Lee County		
	2011	2012
First-time	31%	39%
Repeat	67%	60%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
Property Managers Responding	109	89		109	89		109/109	89/89	
Hotel/Motel/Resort/B&B	58.5%	62.1%	6.2%	\$114.08	\$115.54	1.3%	\$66.69	\$71.69	7.5%
Condo/Cottage/Vacation Home	55.1%	54.0%	-1.9%	\$143.50	\$142.23	-0.9%	\$79.00	\$76.79	-2.8%
RV Park/Campground	31.8%	28.1%	-11.6%	\$37.62	\$38.18	1.5%	\$11.97	\$10.74	-10.3%
AVERAGE	50.9%	52.3%	2.6%	\$109.01	\$112.26	3.0%	\$55.53	\$58.68	5.7%

Calendar YTD 2012 Lee County Snapshot

Total Calendar Year Visitation				
	%		Visitor Estimates	
	2011	2012	2011	2012
Paid Accommodations	53%	50%	1,616,856	1,540,913
Friends/Relatives	47%	50%	<u>1,445,504</u>	<u>1,567,280</u>
Total Visitation			3,062,360	3,108,193

Visitor Origin - Visitors Staying in Paid Accommodations				
	%		Visitor Estimates	
	2011	2012	2011	2012
Florida	10%	8%	139,384	104,238
United States	84%	82%	1,361,045	1,262,944
Germany	2%	5%	27,877	80,067
Canada	6%	4%	101,668	55,896
UK	2%	3%	37,716	42,300
Other International	4%	6%	70,512	96,685
No Answer	1%	<1%	18,038	3,021

Total Visitor Expenditures			
	2011	2012	% Change
Total Visitor Expenditures	\$1,949,931,034	\$1,911,959,158	-1.9%
Paid Accommodations	\$1,233,327,951	\$1,228,395,794	-0.4%

Average Per Person Per Day Expenditures		
2011	2012	% Change
\$114.51	\$119.24	+4.1%

First-Time/Repeat Visitors to Lee County		
	2011	2012
First-time	25%	25%
Repeat	73%	74%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
Hotel/Motel/Resort/B&B	63.7%	66.3%	4.1%	\$143.48	\$147.77	3.0%	\$91.39	\$98.02	7.3%
Condo/Cottage/Vacation Home	64.3%	66.4%	3.3%	\$183.19	\$188.78	3.1%	\$117.74	\$125.39	6.5%
RV Park/Campground	59.2%	56.9%	-3.9%	\$47.82	\$51.24	7.1%	\$28.31	\$29.16	3.0%
AVERAGE	62.8%	64.1%	2.1%	\$131.21	\$137.11	4.5%	\$82.34	\$87.89	6.7%

Visitor Profile Analysis July 2012

A total of 200 interviews were conducted with visitors in Lee County during the month of July 2012. A total sample of this size is considered accurate to plus or minus 6.9 percentage points at the 95% confidence level.

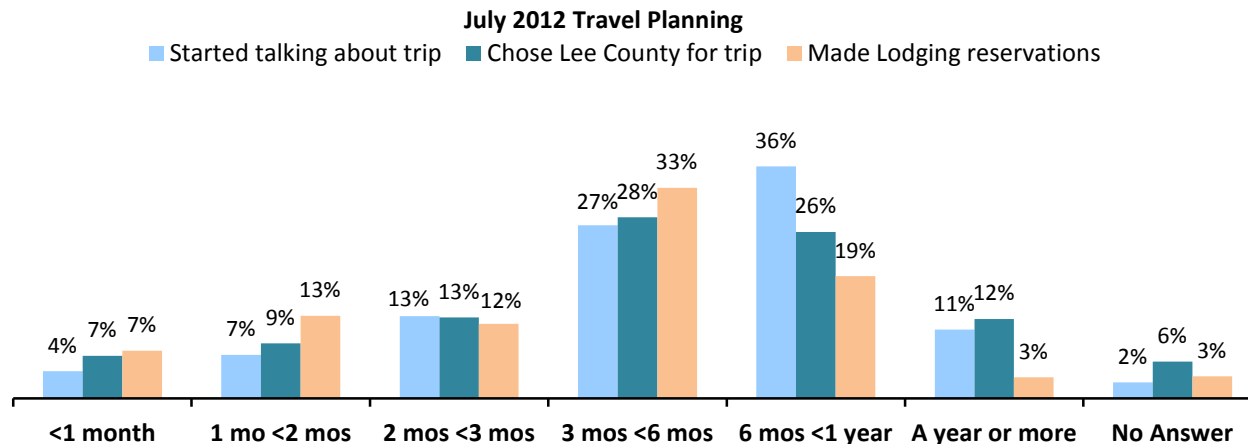
A total of 208 interviews were conducted with visitors in Lee County during the month of July 2011. A total sample of this size is considered accurate to plus or minus 6.8 percentage points at the 95% confidence level.

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

Travel Planning

	Started Talking About Trip		Chose Lee County for Trip		Made Lodging Reservations	
	2011	2012	2011	2012	2011	2012
	A	B	A	B	A	B
Total Respondents	200	208	200	208	200	208
Less than 3 months (NET)	31%	24%	35%	28%	40%	32%
<1 month	7%	4%	10%	7%	13%B	7%
1 month - <2 months	9%	7%	12%	9%	14%	13%
2 months - <3 months	15%	13%	13%	13%	12%	12%
3 months or more (NET)	67%	74%	60%	66%	48%	55%
3 months - <6 months	30%	27%	29%	28%	33%	33%
6 months - <1 year	26%	36%A	20%	26%	7%	19%A
A year or more	12%	11%	11%	12%	8%	3%
No Lodging Reservations Made	N/A	N/A	N/A	N/A	N/A	10%
No Answer	2%	2%	5%	6%	12%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	208
<u>Any (NET)</u>	<u>95%</u>
Laptop computer	68%
Desktop computer	56%
Smartphone (iPhone, Blackberry, etc.)	41%
Tablet (iPad, etc.)	22%
E-Reader (Nook, Kindle, etc.)	8%
Other portable device	1%
None of these	3%
No Answer	2%

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 who use devices for destination planning (2012) or who have access to a computer (2011)	191	198
<u>Visited web sites (net)</u>	<u>81%</u>	<u>86%</u>
Search Engines	33%	38%
Airline websites	22%	36%A
Booking websites	24%	31%
Hotel websites	26%	26%
www.FortMyers-Sanibel.com	14%	23%A
Trip Advisor	18%	19%
Visit Florida	12%	12%
AAA	7%	8%
Facebook	N/A	7%
Travel Channel	1%	-
Other	21%B	13%
None/Didn't visit websites	17%B	10%
No Answer	2%	4%

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.

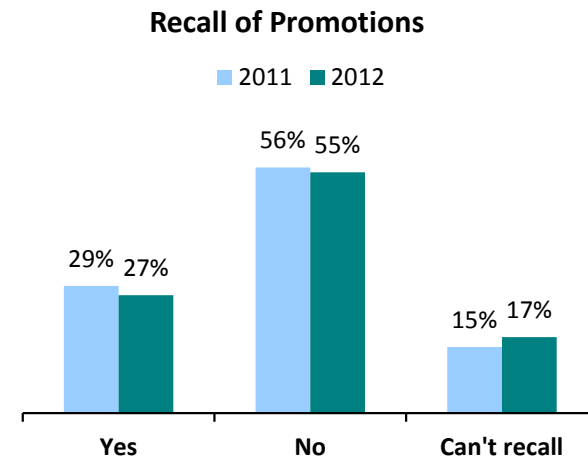
Travel Planning

Travel Information Requested		
	2011	2012
	A	B
Total Respondents	200	208
<u>Requested information (NET)</u>	<u>36%</u>	<u>35%</u>
<i>Hotel Web Site</i>	13%	20%
<i>Call hotel</i>	4%	7%
<i>VCB website</i>	10%	7%
<i>Visitor Guide</i>	4%	6%
<i>Other</i>	16%A	8%
<u>None/Did not request information</u>	<u>54%</u>	<u>61%</u>
No Answer	9%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	200	208
Yes	29%	27%
No	56%	55%
Can't Recall	15%	17%

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



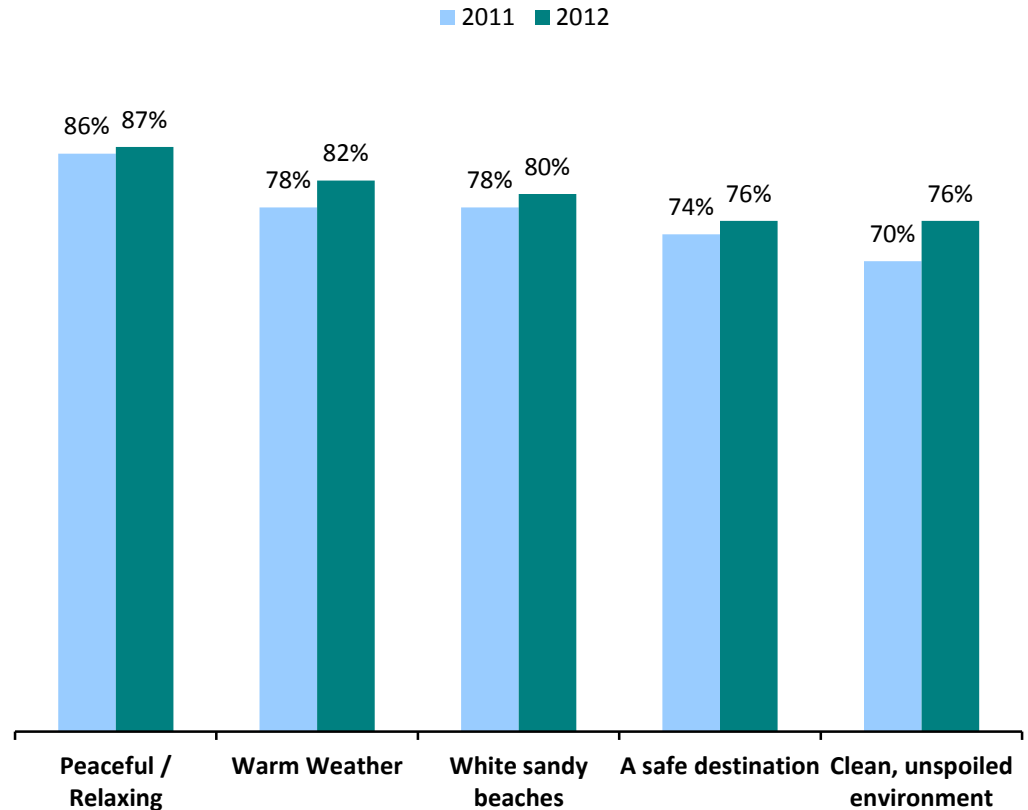
Travel Planning

Travel Decision Influences*		
	2011	2012
	A	B
Total Respondents	200	208
Peaceful / Relaxing	86%	87%
Warm weather	78%	82%
White sandy beaches	78%	80%
A safe destination	74%	76%
Clean, unspoiled environment	70%	76%
Good value for the money	71%	72%
Reasonably priced lodging	67%	71%
A "family" atmosphere	65%	70%
Convenient location	69%	70%
Affordable dining	51%	60%
Upscale accommodations	54%	59%
Plenty to see and do	61%	59%

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)

Top Travel Decisions Influences*



Trip Profile

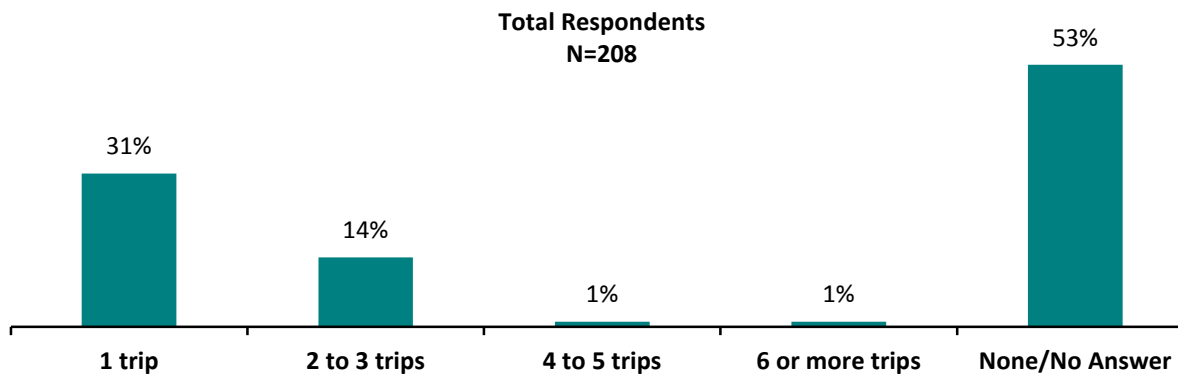
Mode of Transportation		
	2011	2012
	A	B
Total Respondents	200	208
Fly	49%	63%A
Drive a personal vehicle	42%B	29%
Drive a rental vehicle	9%	7%
Drive an RV	-	1%
Other/No Answer (NET)	-	1%

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

Airport Used		
	2011	2012
	A	B
Total Respondents	99	130
SW Florida Int'l (Fort Myers)	67%	77%
Orlando Int'l	11%	9%
Miami Int'l	8%	7%
Ft. Lauderdale Int'l	3%	2%
Tampa Int'l	4%	2%
West Palm Beach Int'l	-	-
Other/No Answer (NET)	7%	3%

Q2: At which Florida airport did you land?

Frequency of Using SW Florida Int'l (in Past Year)



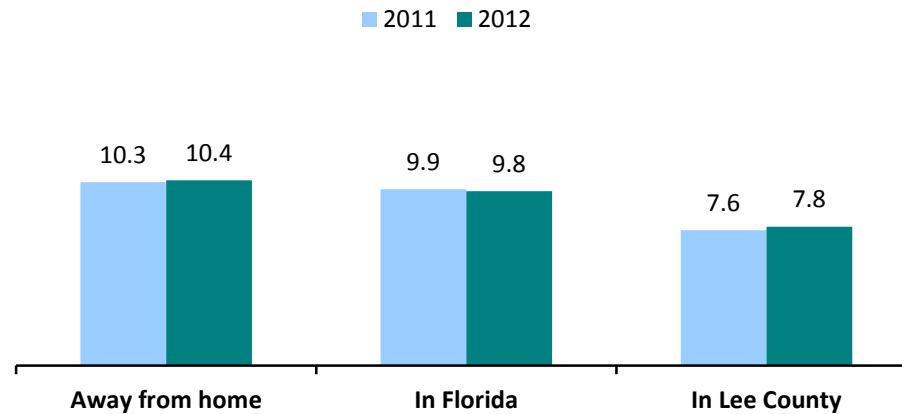
Q40. In the past year, how many trips have you taken where you used Southwest Florida International airport (Fort Myers) for your air travel?
Note: New question added in January 2012.

Trip Profile

Trip Length Mean # of Days			
	2011	2012	% Change
	A	B	
Total Respondents	200	208	
Away from home	10.3	10.4	1.0%
In Florida	9.9	9.8	-1.0%
In Lee County	7.6	7.8	2.6%

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

Trip Length (mean # of days)

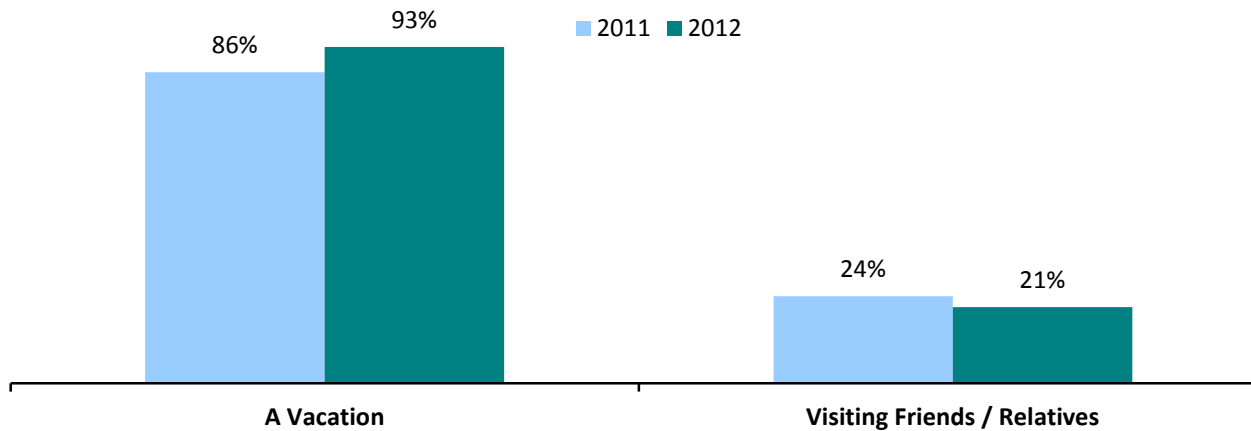


Trip Profile

Reason(s) for Visit		
	2011	2012
	A	B
Total Respondents	200	208
A Vacation	86%	93%A
Visiting Friends / Relatives	24%	21%
Other Business Trip	<1%	1%
Personal Business	3%	2%
Conference/Meeting	1%	1%
Convention/Trade Show	-	-
Sporting Event(s)	2%	<1%
Other/No Answer	3%	1%

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

Reason for June 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	200	208	38*	28**	109	124	39*	49*
First-time Visitor	31%	39%	13%	N/A	28%	40%	58%	45%
No	67%	60%	78%	N/A	71%B	57%	42%	55%
No Answer	2%	1%	8%	-	1%	2%	-	-

Q15: Is this your first visit to Lee County?

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

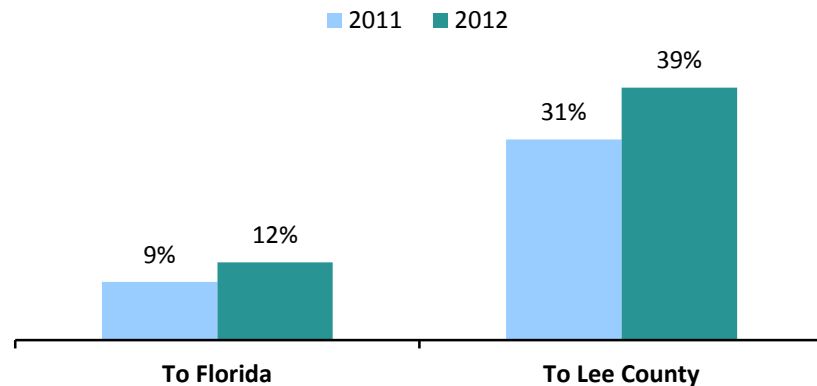
**N/A: Insufficient number of responses for statistical analysis (N<30).

First Time Visitors to Florida		
	2011	2012
Total Respondents	200	208
	A	B
Yes, first-time visitor	9%	12%
No	70%	74%
No answer	2%	1%
<i>FL Residents*</i>	19%	13%

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



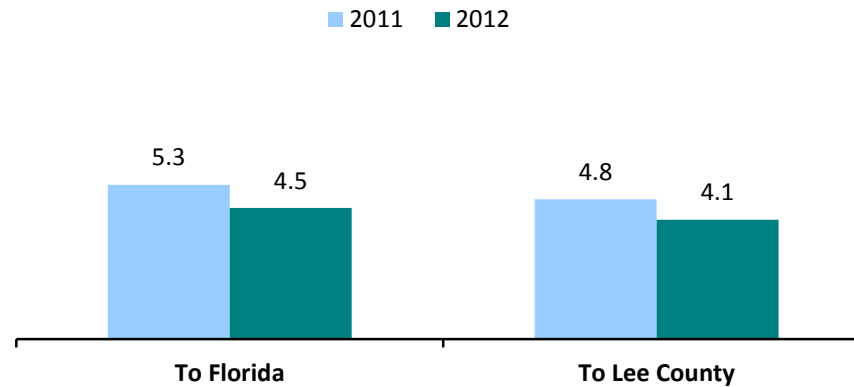
Trip Profile

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	140(FL res. Excl)	154(FL res. Excl)	134	125
Number of visits	5.3	4.5	4.8	4.1

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?

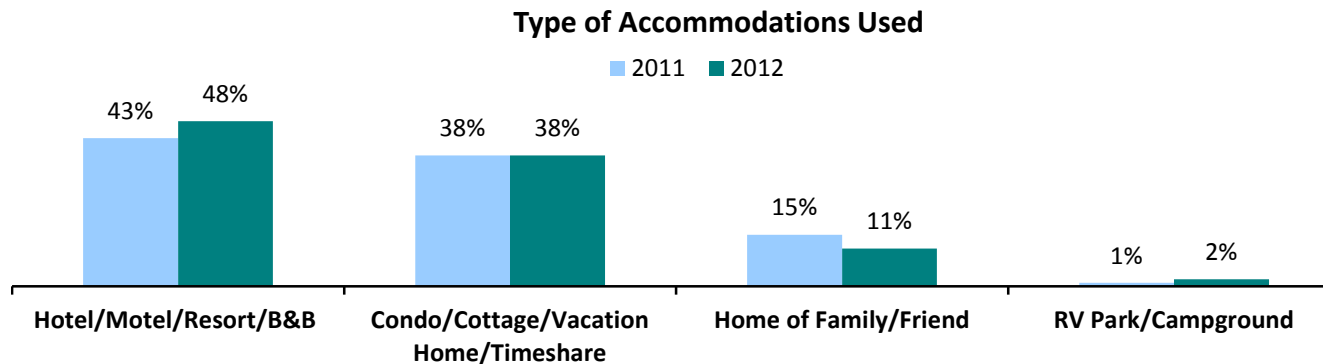
Previous Visits in Five Years



Trip Profile

Type of Accommodations Used		
	2011	2012
	A	B
Total Respondents	200	208
<u>Hotel/Motel/Resort/B&B (NET)</u>	<u>43%</u>	<u>48%</u>
Hotel/motel/historic inn	21%	22%
Resort	22%	26%
Bed and Breakfast	<1%	-
<u>Condo/Cottage/Vacation Home/Timeshare (NET)</u>	<u>38%</u>	<u>38%</u>
Rented home/condo	26%	29%
Owned home/condo	5%	6%
Borrowed home/condo	6%	3%
At the home of family or a friend	15%	11%
RV Park/Campground (NET)	1%	2%
Daytripper (No Accommodations)	2%	1%

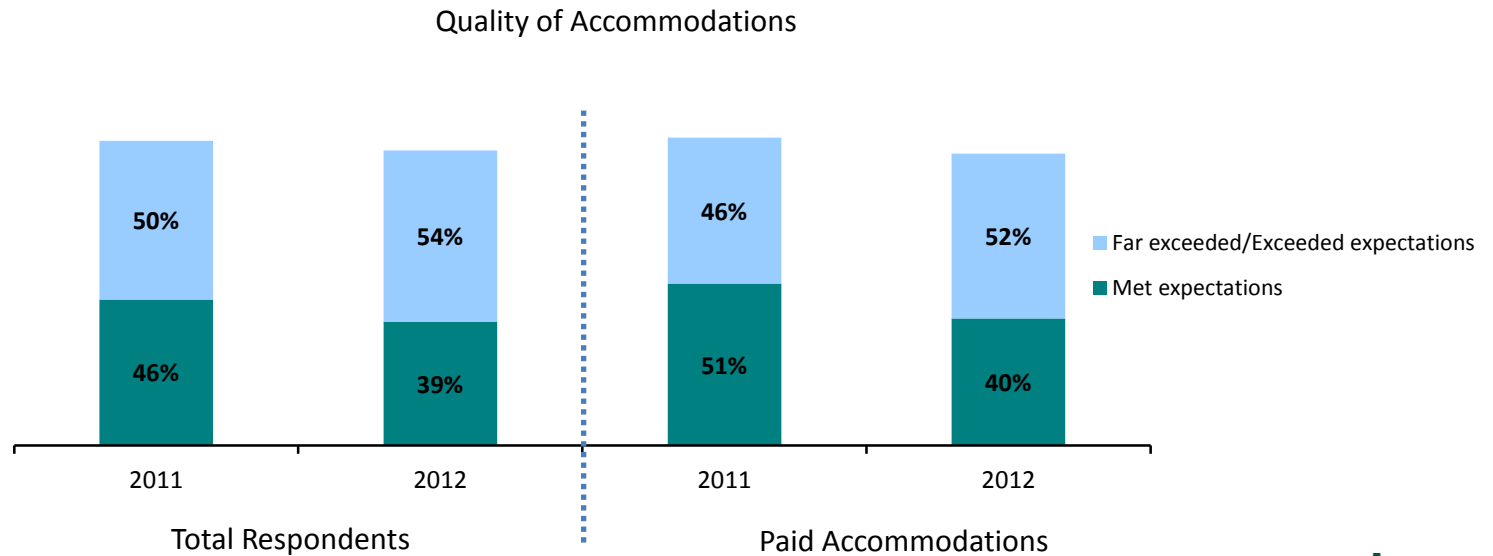
Q20: Are you staying overnight (either last night or tonight):



Trip Profile

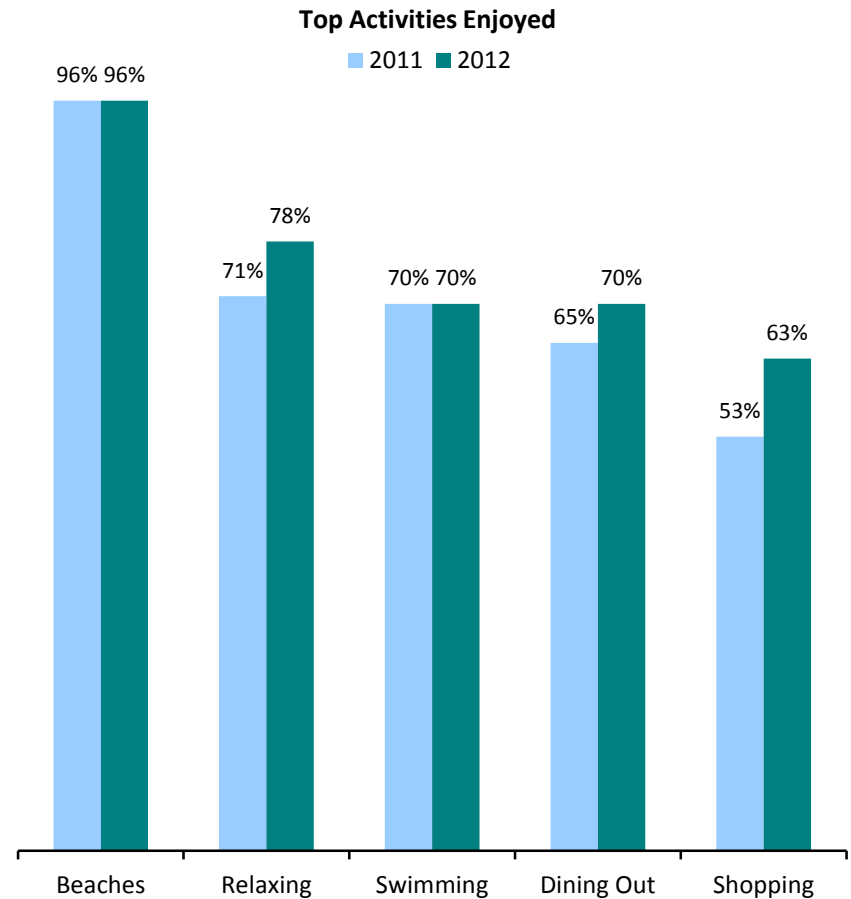
Quality of Accommodations				
	Total Respondents		Paid Accommodations	
	2011	2012	2011	2012
	A	B	A	B
Respondents	200	208	141	164
Far exceeded/Exceeded expectations	50%	54%	46%	52%
Met your expectations	46%	39%	51%	40%
Did not meet/Far below expectations	1%	4%	2%	5%
No Answer	3%	4%	1%	3%

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



Trip Activities

Activities Enjoyed		
	2011	2012
	A	B
Total Respondents	200	208
Beaches	96%	96%
Relaxing	71%	78%
Swimming	70%	70%
Dining Out	65%	70%
Shopping	53%	63%A
Shelling	41%	42%
Sightseeing	34%	35%
Attractions	29%	29%
Photography	24%	24%
Watching Wildlife	23%	18%
Visiting Friends/Relatives	19%	18%
Bars / Nightlife	15%	13%
Fishing	12%	10%
Miniature Golf	10%	9%
Parasailing / Jet Skiing	11%	9%
Exercise / Working Out	15%B	9%
Boating	12%	8%
Bicycle Riding	17%B	7%
Guided Tour	6%	6%
Birdwatching	12%	6%
Kayaking / Canoeing	9%	5%
Golfing	4%	5%
Tennis	3%	4%
Cultural Events	3%	4%
Scuba Diving / Snorkeling	4%	3%
Sporting Event	5%	2%
Other	2%	2%
No Answer	<1%	1%



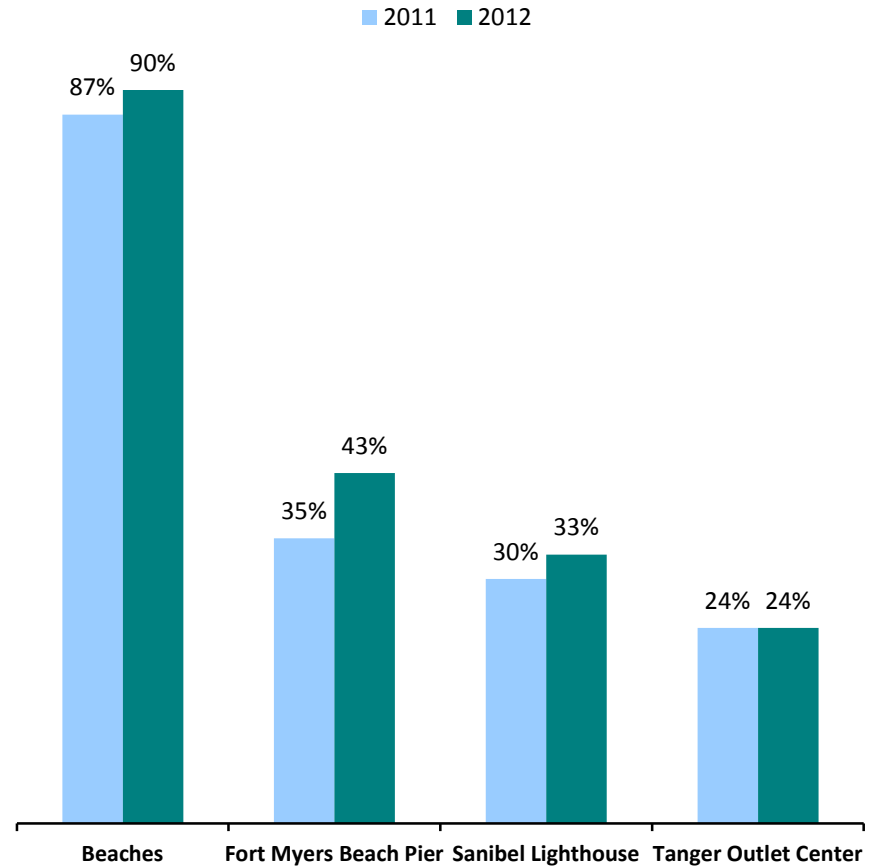
Q23: What activities or interests are you enjoying while in Lee County?
 (Please mark ALL that apply.)

Trip Activities

Attractions Visited		
	2011	2012
	A	B
Total Respondents	200	208
Beaches	87%	90%
Fort Myers Beach Pier	35%	43%
Sanibel Lighthouse	30%	33%
Tanger Outlet Center	24%	24%
Miromar Outlets Mall	17%	19%
Edison / Ford Estates	23%	17%
Periwinkle Place	13%	13%
Shell Factory and Nature Park	13%	11%
Bell Tower Shops	10%	10%
Edison Mall	7%	10%
Coconut Point Mall	10%	9%
Ding Darling National Wildlife Refuge	17%B	9%
Gulf Coast Town Center	6%	6%
Bailey-Matthews Shell Museum	7%B	2%
Manatee Park	2%	1%
Broadway Palm Dinner Theater	2%	<1%
Babcock Wilderness Adventures	1%	-
Other	4%	8%
None/No Answer	3%	4%

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

Top Attractions Visited



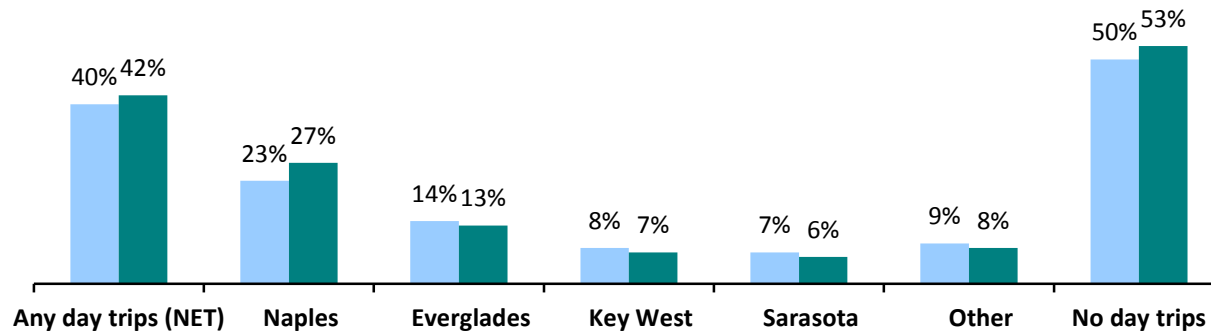
Trip Activities

Day Trips Outside Lee County		
	2011	2012
	A	B
Total Respondents	200	208
<u>Any day trips (NET)</u>	<u>40%</u>	<u>42%</u>
<i>Naples</i>	23%	27%
<i>Everglades</i>	14%	13%
<i>Key West</i>	8%	7%
<i>Sarasota</i>	7%	6%
<i>Other</i>	9%	8%
<u>No day trips</u>	<u>50%</u>	<u>53%</u>
No Answer	16%B	9%

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

Day Trips Outside Lee County

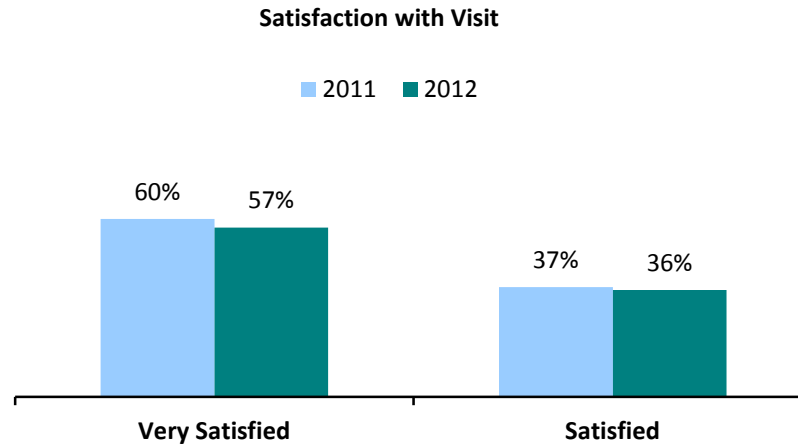
■ 2011 ■ 2012



Lee County Experience

Satisfaction with Visit		
	2011	2012
	A	B
Total Respondents	200	208
<u>Satisfied</u>	<u>97%</u>	<u>93%</u>
<i>Very Satisfied</i>	60%	57%
<i>Satisfied</i>	37%	36%
Neither	2%	2%
Dissatisfied/Very Dissatisfied	-	<1%
Don't know/no answer	1%	4%A

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



Future Plans

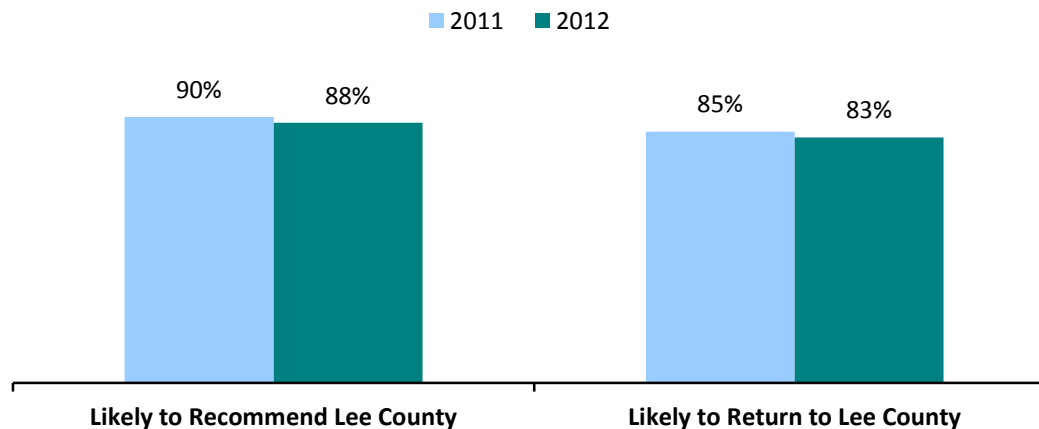
Likelihood to Recommend/Return to Lee County		
	2011	2012
	A	B
Total Respondents	200	208
Likely to Recommend Lee County	90%	88%
Likely to Return to Lee County	85%	83%
Base: Total Respondents Planning to Return	171	173
Likely to Return Next Year	60%	53%

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?

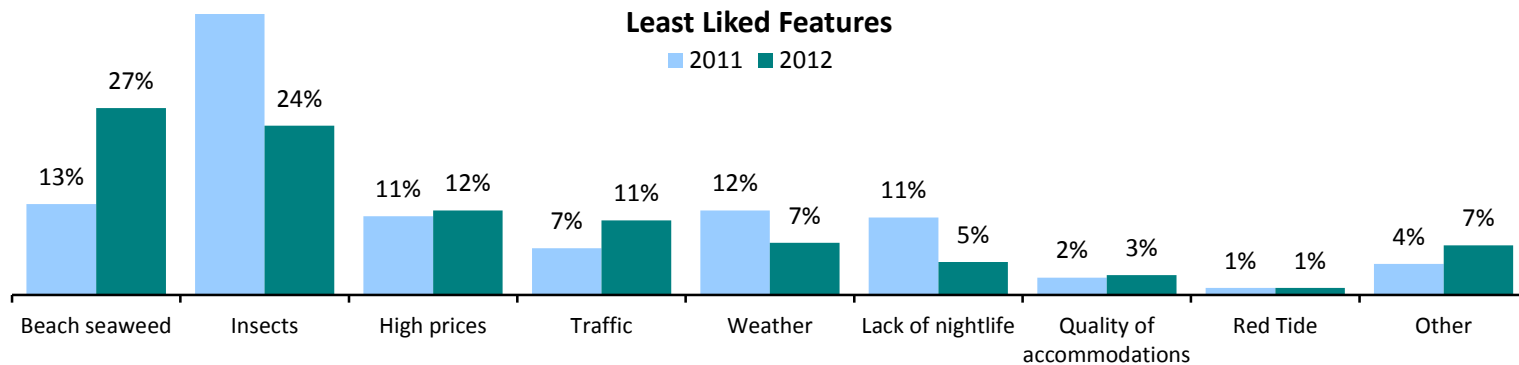
Likelihood to Recommend/Return to Lee County (Responded "Yes")



Trip Activities

Least Liked Features		
	2011	2012
	A	B
Total Respondents	200	208
Beach seaweed	13%	27%A
Insects	40%B	24%
High prices	11%	12%
Traffic	7%	11%
Weather	12%	7%
Lack of nightlife	11%B	5%
Quality of accommodations	2%	3%
Red Tide	1%	1%
Other	4%	7%
Nothing/No Answer (NET)	31%	34%

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

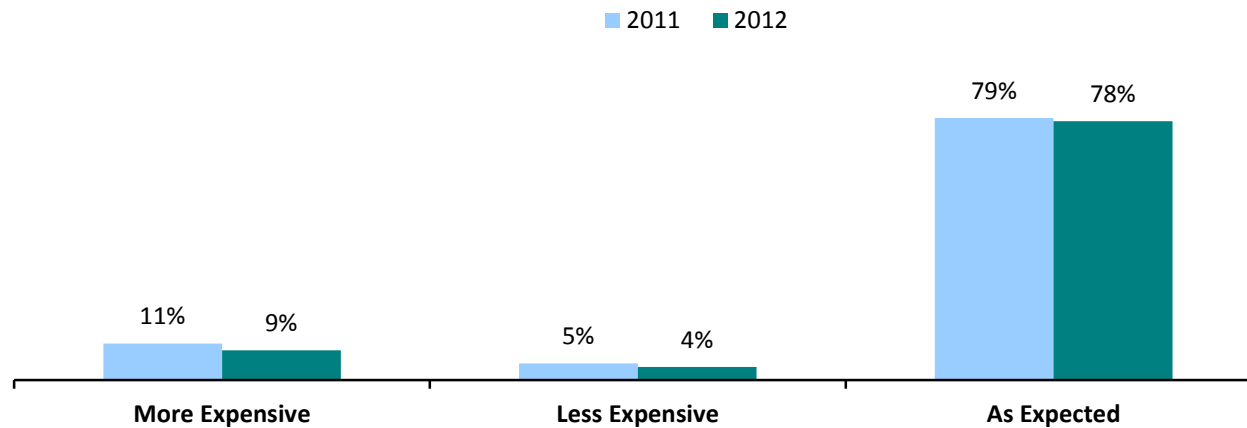


Trip Activities

Perception of Lee County as Expensive		
	2011	2012
	A	B
Total Respondents	200	208
More Expensive	11%	9%
Less Expensive	5%	4%
As Expected	79%	78%
Don't know/No Answer (NET)	5%	9%

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

Perception of Lee County as Expensive



Visitor and Travel Party Demographic Profile

Visitor Demographic Profile		
	2011	2012
	A	B
Total Respondents	200	208
Age of respondent (mean)	43.6	46.7A
Annual household income (mean)	\$100,497	\$105,620
Martial Status		
Married	68%	75%
Single	18%	12%
Vacations per year (mean)	2.8	2.2
Short getaways per year (mean)	3.4	3.3

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	200	208
Family	56%	56%
Couple	23%	27%
Group of couples/friends	10%	10%
Single	6%	4%
Mean travel party size	3.8	4.1
Mean adults in travel party	2.6	3.1A

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	200	208
<u>Traveling with any Children (net)</u>	<u>49%</u>	<u>49%</u>
Any younger than 6	16%	16%
Any ages 6-11	25%	23%
Any 12-17 years old	29%	32%
No Children	51%	51%

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	62%	56%	243,695	225,229	-7.6%
Friends/Relatives	38%	44%	152,408	176,438	15.8%
<i>Total Visitation</i>			396,103	401,667	1.4%

Paid Accommodations Visitors					
	%		Visitor Estimates		
Country of Origin	2011	2012	2011	2012	% Change
United States	79%	76%	191,845	170,295	-11.2%
Germany	1%	7%	3,457	16,480	376.8%
UK	4%	6%	10,370	13,733	32.4%
Scandinavia	3%	3%	6,913	6,867	-0.7%
Canada	4%	2%	10,370	5,493	-47.0%
Latin America	1%	1%	1,728	2,747	58.9%
France	1%	1%	1,728	1,373	-20.5%
BeNeLux	2%	1%	5,185	1,373	-73.5%
Ireland	1%	1%	1,728	1,373	-20.5%
Switzerland	3%	0%	6,913	-	-
Austria	1%	0%	1,728	-	-
Other International	1%	1%	1,728	2,747	58.9%
No Answer	-	1%	-	2,747	-
U.S. Region of Origin	2011	2012	2011	2012	% Change
Florida	31%	20%	58,763	34,334	-41.6%
South (including Florida)	<50%>	38%	96,787	64,547	-33.3%
Midwest	25%	<44%>	48,393	75,534	56.1%
Northeast	15%	13%	29,382	21,974	-25.2%
West	1%	3%	1,728	5,493	217.8%
No Answer	8%	2%	15,555	4,120	-73.5%

2012 Top DMAs (Paid Accommodations)		
Miami-Fort Lauderdale	9%	15,107
Cincinnati	6%	9,613
Saint Louis	5%	8,240
Youngstown	4%	6,867
Kansas City	4%	6,867
Columbus, OH	4%	6,867
West Palm Beach-Fort Pierce	4%	6,867
Cleveland-Akron	4%	6,867
Lexington	3%	5,493
Chicago	3%	5,493
Tampa-Saint Petersburg (Sarasota)	3%	5,493

< > 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.

Occupancy Data Analysis July 2012

Property managers representing 94 properties in Lee County were interviewed for the July 2012 Occupancy Survey between August 1 and August 15, 2012, a sample considered accurate to plus or minus 10.1 percentage points at the 95% confidence level.

Property managers representing 114 properties in Lee County were interviewed for the July 2011 Occupancy Survey between August 1 and August 15, 2011, a sample considered accurate to plus or minus 9.2 percentage points at the 95% confidence level.

Occupancy/Daily Rates

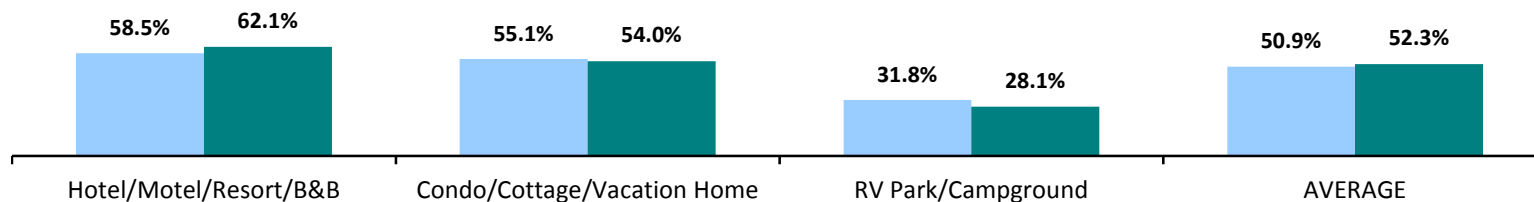
	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
Property Managers Responding	109	89		109	89		109/109	89/89	
Hotel/Motel/Resort/B&B	58.5%	62.1%	6.2%	\$114.08	\$115.54	1.3%	\$66.69	\$71.69	7.5%
Condo/Cottage/Vacation Home	55.1%	54.0%	-1.9%	\$143.50	\$142.23	-0.9%	\$79.00	\$76.79	-2.8%
RV Park/Campground	31.8%	28.1%	-11.6%	\$37.62	\$38.18	1.5%	\$11.97	\$10.74	-10.3%
AVERAGE	50.9%	52.3%	2.6%	\$109.01	\$112.26	3.0%	\$55.53	\$58.68	5.7%

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

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

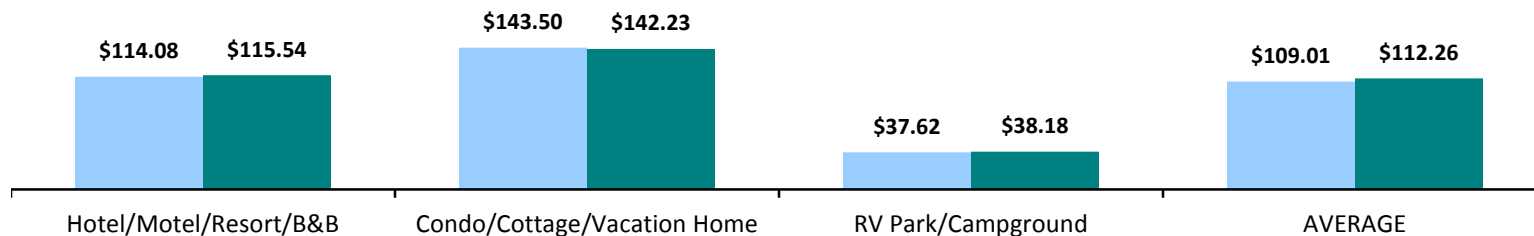
Average Occupancy Rate

■ 2011 ■ 2012



Average Daily Rate

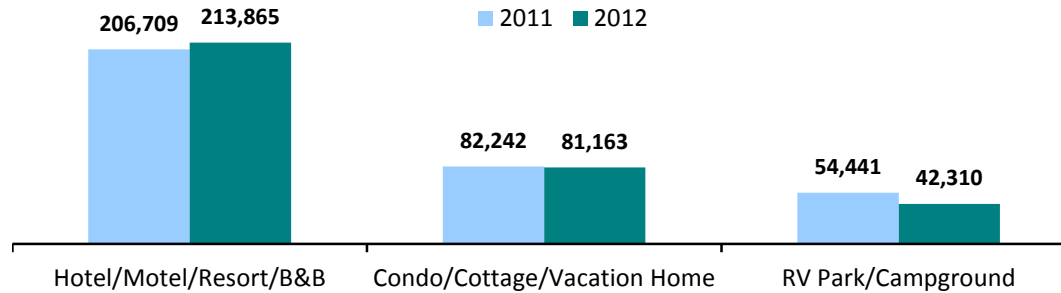
■ 2011 ■ 2012



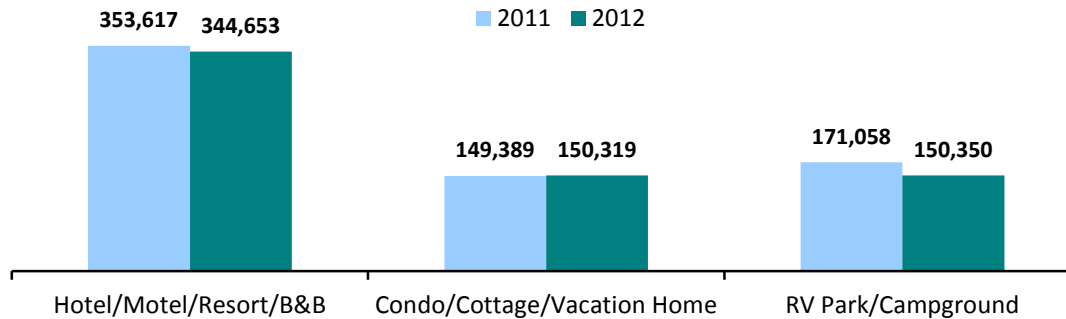
Room/Unit/Site Nights

	Occupied Room Nights			Available Room Nights		
	2011	2012	% Change	2011	2012	% Change
Hotel/Motel/Resort/B&B	206,709	213,865	3.5%	353,617	344,653	-2.5%
Condo/Cottage/Vacation Home	82,242	81,163	-1.3%	149,389	150,319	0.6%
RV Park/Campground	54,441	42,310	-22.3%	171,058	150,350	-12.1%
Total	343,392	337,338	-1.8%	674,064	645,322	-4.3%

Occupied Room Nights



Available Room Nights



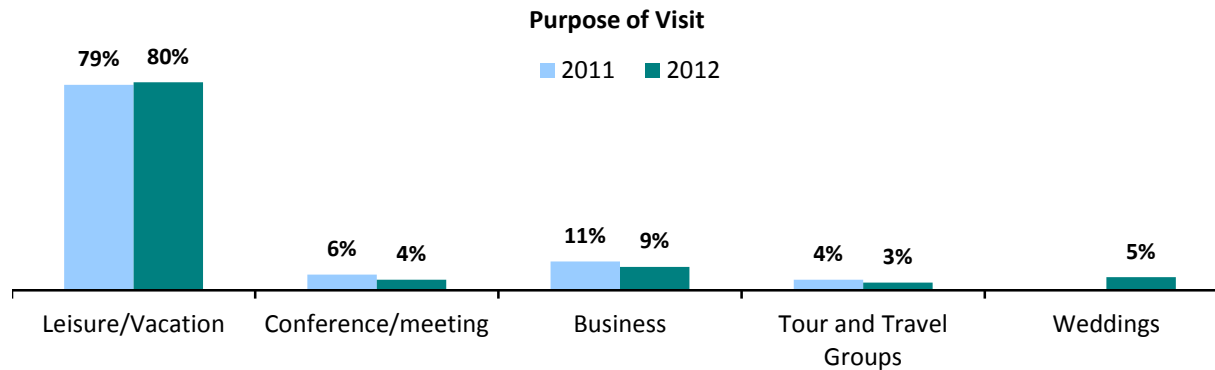
Lodging Management Estimates

Guest Profile		
	2011	2012
	A	B
Property Managers Responding	100	84
<u>Purpose of Visit</u>		
Leisure/Vacation	79%	80%
Conference/meeting	6%	4%
Business	11%	9%
Tour and Travel Groups	4%	3%
Weddings/Social groups/Reunions (net)	-	5%A
Property Managers Responding	104	84
Average guests per room	2.8	2.8
Property Managers Responding	104	83
Average length of stay in nights	5.4	4.8

Q22: What percent of your June room/site/unit occupancy do you estimate was generated by:

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

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

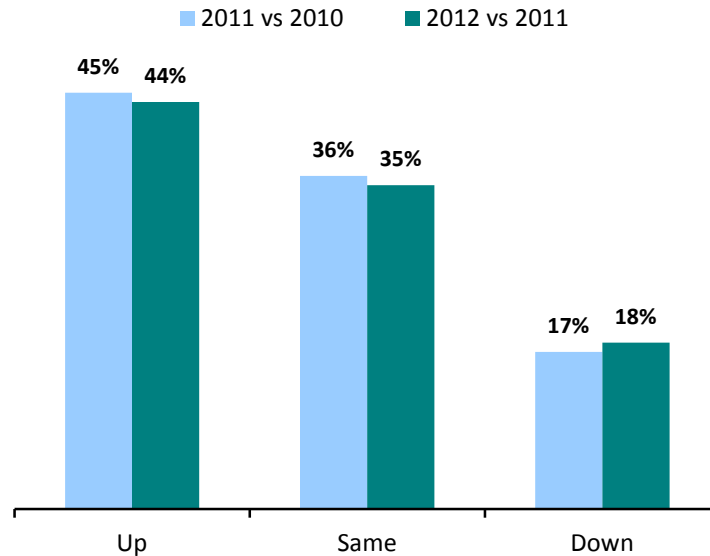


Occupancy Barometer

Level of Reservations for Next 3 Months Compared to Last Year		
	2011	2012
	A	B
Total Respondents	106	89
<u>Up/Same (net)</u>	<u>81%</u>	<u>79%</u>
Up	45%	44%
Same	36%	35%
Down	17%	18%

Q24: Compared to August, September, and October of one year ago, is your property's total level of reservations up, the same or down for the upcoming August, September, and October?

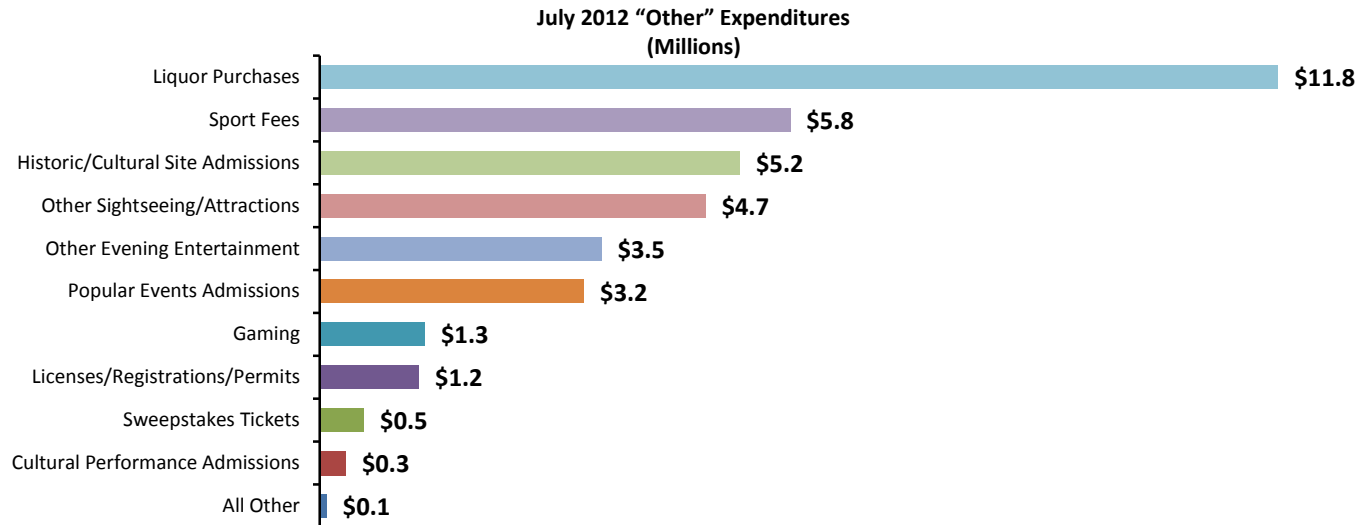
Level of Reservations for Next 3 Months



Economic Impact Analysis
July 2012

Total Visitor Expenditures by Spending Category

TOTAL EXPENDITURES			
	2011	2012	% Change
TOTAL	<u>\$202,828,184</u>	<u>\$203,341,107</u>	0.3%
Food and Beverages	\$57,538,085	\$55,543,969	-3.5%
Shopping	\$50,174,026	\$53,217,231	6.1%
Lodging Accommodations	\$37,432,129	\$37,868,558	1.2%
Ground Transportation	\$21,769,762	\$19,081,764	-12.3%
Other	\$35,914,182	\$37,629,585	4.8%



Total Visitor Expenditures by Lodging Type

TOTAL EXPENDITURES						
	Staying Paid Accommodations			Visiting Friends and Relatives/Day Trippers		
	2011	2012	% Change	2011	2012	% Change
TOTAL	<u>\$116,027,393</u>	<u>\$116,365,154</u>	<u>0.3%</u>	<u>\$86,800,791</u>	<u>\$86,975,953</u>	<u>0.2%</u>
Lodging Accommodations	\$37,432,129	\$37,868,558	1.2%	\$0	\$0	-
Food and Beverages	\$27,753,762	\$27,356,797	-1.4%	\$29,784,323	\$28,187,172	-5.4%
Shopping	\$24,889,885	\$25,188,258	1.2%	\$25,284,141	\$28,028,973	10.9%
Ground Transportation	\$8,692,106	\$9,036,410	4.0%	\$13,077,656	\$10,045,354	-23.2%
Other	\$17,259,511	\$16,915,131	-2.0%	\$18,654,671	\$20,714,454	11.0%

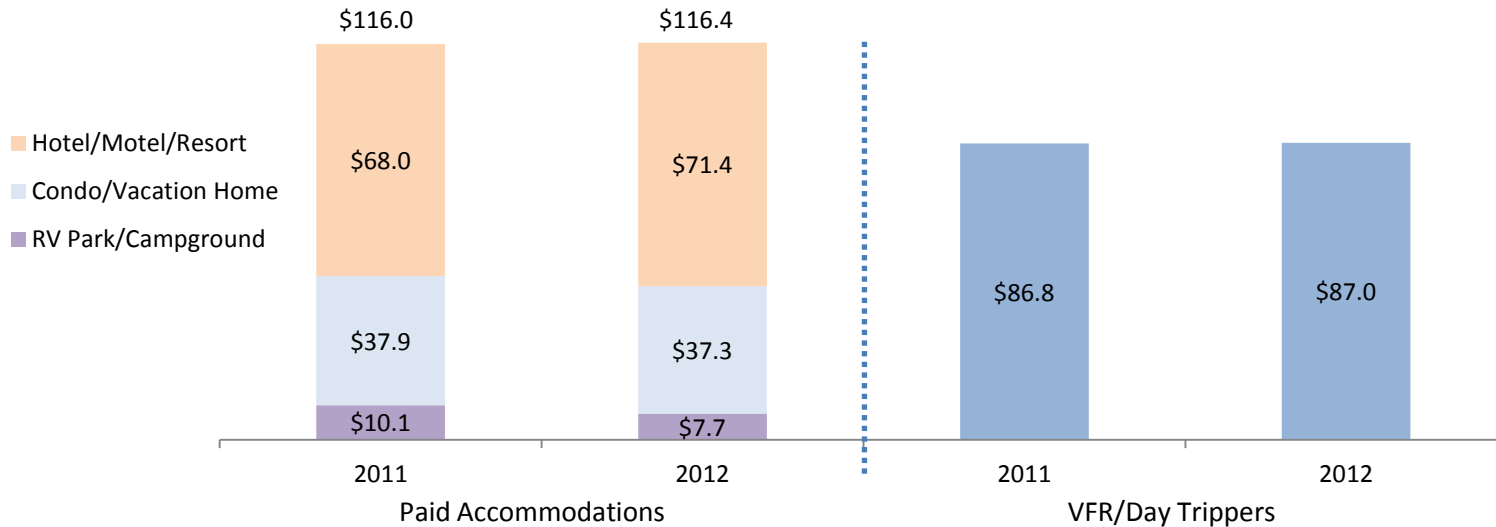
“Other ” includes the following categories:

- 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	<u>\$202,828,184</u>	<u>\$203,341,107</u>	<u>0.3%</u>	<u>100%</u>	<u>100%</u>
Visiting Friends & Relatives/Day Trippers	\$86,800,791	\$86,975,953	0.2%	43%	43%
<u>Paid Accommodations</u>	<u>\$116,027,393</u>	<u>\$116,365,154</u>	<u>0.3%</u>	<u>57%</u>	<u>57%</u>
<i>Hotel/Motel/Resort/B&B</i>	\$68,039,174	\$71,373,107	4.9%	34%	35%
<i>Condo/Cottage/Vacation Home</i>	\$37,909,937	\$37,284,690	-1.6%	19%	18%
<i>RV Park/Campground</i>	\$10,078,282	\$7,707,357	-23.5%	5%	4%

Expenditures by Lodging Type
(Millions)



Appendix
July 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 Campground	7/26/2012	4
Sanibel	Lighthouse Beach	7/26/2012	11
Fort Myers	Centennial Park	7/28/2012	10
Fort Myers	Clarion	7/28/2012	6
North Fort Myers	Shell Factory	7/28/2012	8
Total			208

Occupancy Interviewing Statistics

Interviews were conducted from August 1 – August 15, 2012. Information was provided by 94 Lee County lodging properties.

Lodging Type	Number of Interviews
Hotel/Motel/Resort/B&Bs	59
Condo/Cottage/Vacation Home/Timeshare	26
RV Park/Campground	9
Total	94