



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

**September 2012 Visitor Profile and Occupancy Analysis
November 16, 2012**

Prepared for:

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

Prepared by:

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Executive Summary

September 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 September 2012, Lee County hosted 139,200 visitors staying in paid accommodations and 101,100 staying with friends or relatives while visiting, for a total of about 240,300 visitors.
- September 2012 visitation among paid accommodations guests was up 4.6% year-over-year. Visitation among those staying with friends or relatives was down 15.1% from September 2011, when there was substantial growth over 2010. The total number of visitors during September 2012 was 4.7% lower than the prior year but on par with 2010.

Estimated Visitation	2011	2012	% Change
Paid Accommodations	133,071	139,239	4.6%
Friends/Relatives	119,068	101,063	-15.1%
Total Visitation	252,139	240,302	-4.7%

Visitor Expenditures

- September 2012 visitors spent an estimated \$104.4 million during their stay – a healthy increase from spending levels estimated for September 2011 (+9.6%).
- Paid accommodations guests contributed \$70 million – roughly two-thirds of the total. Those visiting friends and relatives added another \$34 million. Spending among both visitor segments was showed increases over the prior year, despite the decline in VFR visitation.

Estimated Expenditures	2011	2012	% Change
Paid Accommodations	\$68,176,524	\$69,930,031	2.6%
Friends/Relatives	\$27,087,605	\$34,459,161	27.2%
Total Expenditures	\$95,264,129	\$104,389,192	9.6%

Visitor Origin

- Fully three-quarters of September 2012 visitors staying in paid accommodations were U.S. residents (77%) – a higher proportion than last year (65%). Lee County drew the largest share of international visitors from Germany.
- A sizeable minority of September 2012 domestic paid accommodations guests came from the South (39%) – most of them Florida residents. Three in ten are from the Midwest (30%) and two in ten from the Northeast (22%).
- New York was the top domestic feeder market for the Lee County lodging industry in September 2012 and Tampa ranked second. West Palm Beach, Chicago, and Washington, DC had a strong presence among paid lodging guests.

2012 Top DMAs (Paid Accommodations)

	%	Estimate
New York	9%	9,875
Tampa-Saint Petersburg (Sarasota)	7%	7,900
West Palm Beach-Fort Pierce	5%	4,938
Chicago	5%	4,938
Washington, DC (Hagerstown)	5%	4,938
Miami-Fort Lauderdale	4%	3,950
Dayton	4%	3,950
Columbus, OH	3%	2,963
Cincinnati	3%	2,963

Visitors Staying in Paid Accommodations

Country of Origin	%		Visitor Estimates		% Change
	2011	2012	2011	2012	
United States	65%	<77%>	86,155	106,651	23.8%
Germany	13%	13%	17,060	17,775	4.2%
UK	<12%>	2%	15,354	2,963	-80.7%
Canada	4%	1%	5,971	1,975	-66.9%
BeNeLux	1%	1%	1,706	1,975	15.8%
Switzerland	1%	1%	1,706	1,975	15.8%
Scandinavia	1%	1%	853	1,975	131.5%
Other Europe	1%	1%	853	1,975	131.5%
France	2%	1%	2,559	988	-61.4%
Austria	1%	-	853	-	-
Other	-	1%	-	988	-

Visitors Staying in Paid Accommodations

U.S. Region of Origin	%		Visitor Estimates		% Change
	2011	2012	2011	2012	
Florida	28%	19%	23,885	20,738	-13.2%
South (including Florida)	46%	39%	39,239	41,475	5.7%
Midwest	30%	30%	25,591	31,600	23.5%
Northeast	15%	22%	12,795	23,700	85.2%
West	-	4%	-	3,950	-
No Answer	10%	6%	8,530	5,925	-30.5%

< > 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 September 2012 visitors was similar in length to that of September 2011 visitors. Well over half said they started talking about and chose Lee County for their trip destination three or more months in advance but fewer than half made their lodging reservations that far out.
 - 71% started talking about trip in that timeframe (vs. 68% September 2011)
 - 63% chose Lee County for trip (vs. 59% September 2011)
 - 45% made lodging reservation (vs. 48% September 2011)
- Use of the internet while planning their Lee County trip continued to be prevalent among September 2012 visitors – eighty-six percent claim to have visited one or more websites. Visitors most often mentioned using airline websites (42%). While laptop or desktop computers were still the most frequently mentioned device visitors said they typically access online destination planning information, about one-third indicated they use a smartphone (36%).
- Consistent with reports from September 2011 visitors, the attributes that received the highest ratings among September 2012 visitors with regard to influencing their selection when talking about coming to Lee County were:
 - *Peaceful/relaxing* (85%),
 - *Warm weather* (83%), and
 - *White sandy beaches* (80%).

Visitor Profile

- More than two-thirds of September 2012 visitors arrived by plane when traveling to the area (71%). Most of those who flew came through Southwest Florida International Airport (82%). In contrast, only 63% of September 2011 visitors traveling by air claimed they flew into RSW – a significantly lower proportion.
- The average number of days away from home (9.6), in Florida (8.9), and in Lee County (7.4) was about one day shorter among September 2012 visitors than among September 2011 visitors.
- About half of visitors interviewed indicated they were staying in hotel/motel/resorts (49%) during their trip. One-third said they were staying in a condo/vacation home property (34%). Fully half of those staying in paid accommodations reported that the quality of their accommodations *far exceeded* or *exceeded expectations* (51%).

Visitor Profile (cont'd)

- The top activities visitors enjoyed in Lee County during September 2012 were beaches (96%), relaxing (80%), dining out (76%), swimming (65%), and shopping (57%).
- Overall, visitor satisfaction remains extremely high – nine in ten September 2012 visitors reported being *very satisfied* (58%) or *satisfied* (35%) with their visit. About the same proportion indicated they are likely to return to Lee County (88%), more than half of whom claimed they will return next year (57%). The majority also said they will recommend Lee County to a friend over other areas in Florida (85%).
- When asked what they disliked about the Lee County area, about one-quarter of September 2012 visitors reported *insects* (27%) as a concern, which was also the most frequent mention among September 2011 visitors (21%). September 2012 visitors also cited *traffic* as a dislike but at much lower levels (15%), although a higher incidence than reported by 2011 visitors.
- The demographic composition of September 2012 visitors can be summarized as follows:
 - 48 years of age on average
 - \$96,600 household income on average
 - 70% married
 - 27% traveling as a family
 - 47% traveling as a couple
 - 86% traveling *without* children
 - 2 to 3 people in travel party on average

Lodging Industry Assessments

- For the Lee County lodging industry in total, *available* room nights declined 2.1% from September 2011 to 2012 while *occupied* room nights rose 1.8%. Hotel/motel/resort and RV Park/campground properties had increases in *occupied* room nights coupled with flat or declining room night availability. Condos/vacation homes had a drop in *available* room nights but the corresponding rate of decline in *occupied* room nights was not as great.

	Occupied Room Nights			Available Room Nights		
	2011	2012	% Change	2011	2012	% Change
Hotel/Motel/Resort/B&B	138,505	142,441	2.8%	334,440	328,290	-1.8%
Condo/Cottage/Vacation Home	47,200	46,212	-2.1%	147,885	140,940	-4.7%
RV Park/Campground	32,513	33,564	3.2%	144,150	144,228	0.1%
Total	218,218	222,217	1.8%	626,475	613,458	-2.1%

- As a result, the industry-wide average occupancy rate in Lee County jumped from 34.8% in September 2011 to 36.2% in September 2012 (+4.0%). Average occupancy rate increased for all three property types.
- At the same time, Lee County's average daily rate held showed somewhat of increase year-over-year (+1.4%). ADR was relatively unchanged versus last September for hotels/motels/resorts and RV parks/campgrounds, while condos/vacation homes saw notable growth in ADR (+6.7%).
- These increase in both average occupancy rate and ADR fostered a 5.4% uptick in RevPAR for September year-over-year. As with average occupancy rate, increases were observed across all three property types.

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
Property Managers Responding	106	101		107	100		106/107	101/100	
Hotel/Motel/Resort/B&B	41.4%	43.4%	4.8%	\$101.38	\$101.43	0.1%	\$41.99	\$44.01	4.8%
Condo/Cottage/Vacation Home	31.9%	32.8%	2.8%	\$107.38	\$114.54	6.7%	\$34.27	\$37.56	9.6%
RV Park/Campground	22.6%	23.3%	3.1%	\$41.80	\$41.47	-0.8%	\$9.43	\$9.65	2.3%
AVERAGE	34.8%	36.2%	4.0%	\$93.80	\$95.10	1.4%	\$32.67	\$34.45	5.4%

Lodging Industry Assessments (cont'd)

- Lee County property managers' commentary on projected reservations for the fall season 2012 (October – December) matched the level of optimism expressed this time last year. About one-third of managers responding reported that their total level of reservations for the next three months (October, November, and December) are up over the same period the prior year (32%) – about the same as reports in 2011 (37%). Slightly fewer than half said reservations for the next three months of 2012 are at least the same as the same time last year (46% vs. 36% September 2011), and two in ten claimed that their reservations are down for the next three months (21% vs. 26% September 2011).

September 2012 Lee County Snapshot

Total Visitation				
	%		Visitor Estimates	
	2011	2012	2011	2012
Paid Accommodations	53%	58%	133,071	139,239
Friends/Relatives	47%	42%	119,068	101,063
<i>Total Visitation</i>			252,139	240,302

Total Visitor Expenditures			
	2011	2012	% Change
Total Visitor Expenditures	\$95,264,129	\$104,389,192	9.6%
Paid Accommodations	\$68,176,524	\$69,930,031	2.6%

Visitor Origin - Visitors Staying in Paid Accommodations				
	%		Visitor Estimates	
	2011	2012	2011	2012
Florida	28%	19%	23,885	20,738
United States	65%	77%	86,155	106,651
Germany	13%	13%	17,060	17,775
UK	12%	2%	15,354	2,963
Canada	4%	1%	5,971	1,975
Other International	6%	7%	8,530	9,875
No Answer	-	-	-	-

Average Per Person Per Day Expenditures		
2011	2012	% Change
\$100.50	\$103.50	+3.0%

First-Time/Repeat Visitors to Lee County		
	2011	2012
First-time	27%	32%
Repeat	72%	68%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
Property Managers Responding	106	101		107	100		106/107	101/100	
Hotel/Motel/Resort/B&B	41.4%	43.4%	4.8%	\$101.38	\$101.43	0.1%	\$41.99	\$44.01	4.8%
Condo/Cottage/Vacation Home	31.9%	32.8%	2.8%	\$107.38	\$114.54	6.7%	\$34.27	\$37.56	9.6%
RV Park/Campground	22.6%	23.3%	3.1%	\$41.80	\$41.47	-0.8%	\$9.43	\$9.65	2.3%
AVERAGE	34.8%	36.2%	4.0%	\$93.80	\$95.10	1.4%	\$32.67	\$34.45	5.4%

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%	<u>1,705,073</u>	<u>1,839,482</u>
<i>Total Visitation</i>			<i>3,618,673</i>	<i>3,702,118</i>

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

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%

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

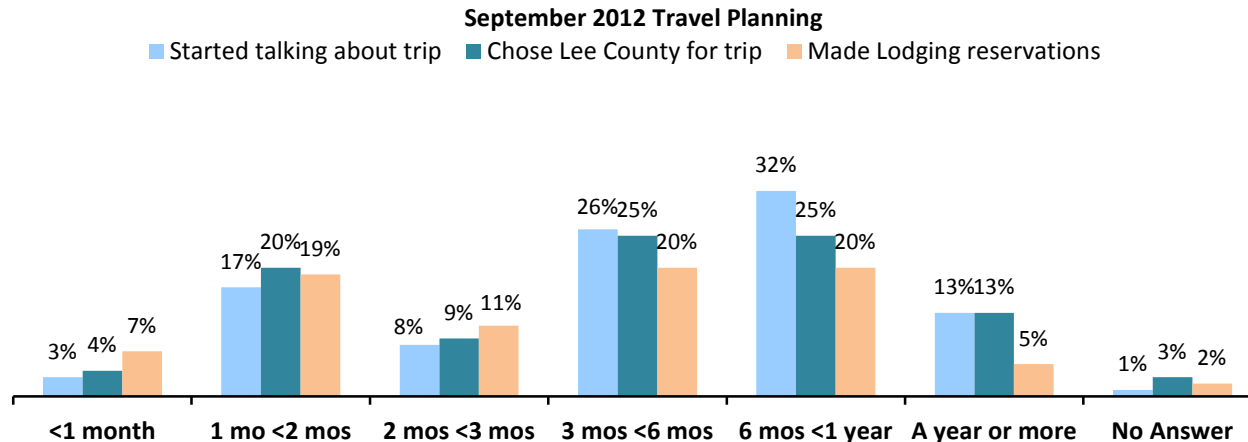
A total of 206 interviews were conducted with visitors in Lee County during the month of September 2011. A total sample of this size is considered accurate to plus or minus 6.8 percentage points at the 95% confidence level.

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	206	204	206	204	206	204
<u>Less than 3 months (NET)</u>	<u>30%</u>	<u>28%</u>	<u>36%</u>	<u>33%</u>	<u>43%</u>	<u>37%</u>
<1 month	6%	3%	6%	4%	9%	7%
1 month - <2 months	13%	17%	15%	20%	17%	19%
2 months - <3 months	12%	8%	16%	9%	16%	11%
<u>3 months or more (NET)</u>	<u>68%</u>	<u>71%</u>	<u>59%</u>	<u>63%</u>	<u>48%</u>	<u>45%</u>
3 months - <6 months	26%	26%	22%	25%	20%	20%
6 months - <1 year	29%	32%	26%	25%	21%	20%
A year or more	13%	13%	10%	13%	7%	5%
No Lodging Reservations Made	N/A	N/A	N/A	N/A	N/A	16%
No Answer	1%	1%	5%	3%	9%	2%

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	204
	100%
<u>Any (NET)</u>	<u>97%</u>
Laptop computer	65%
Desktop computer	49%
Smartphone (iPhone, Blackberry, etc.)	36%
Tablet (iPad, etc.)	23%
E-Reader (Nook, Kindle, etc.)	2%
Other portable device	1%
None of these	2%
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	195	198
<u>Visited web sites (net)</u>	<u>81%</u>	<u>86%</u>
Airline websites	31%	42%A
Hotel websites	29%	31%
Search Engines	28%	30%
Booking websites	23%	30%
Trip Advisor	20%	19%
www.FortMyers-Sanibel.com	15%	16%
Visit Florida	13%	8%
Facebook	N/A	5%
AAA	6%	4%
Travel Channel	1%	N/A
Other	17%	11%
None/Didn't visit websites	15%	12%
No Answer	4%	2%

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.

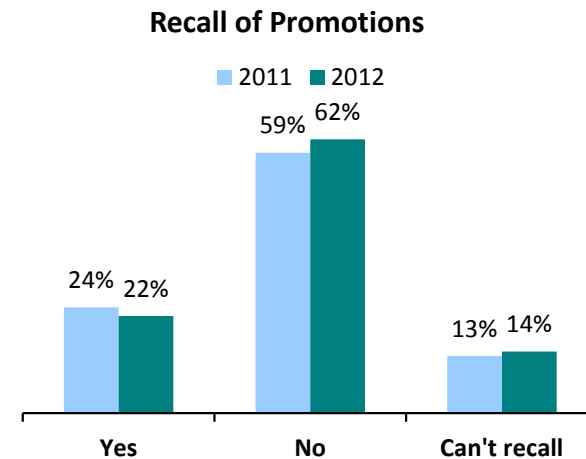
Travel Planning

Travel Information Requested		
	2011	2012
	A	B
Total Respondents	206	204
<u>Requested information (NET)</u>	<u>32%</u>	<u>31%</u>
<i>Hotel Web Site</i>	12%	12%
<i>VCB website</i>	9%	8%
<i>Call hotel</i>	5%	8%
<i>Visitor Guide</i>	6%	3%
<i>Other</i>	10%	10%
<u>None/Did not request information</u>	<u>57%</u>	<u>64%</u>
No Answer	11%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	206	204
Yes	24%	22%
No	59%	62%
Can't Recall	13%	14%

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



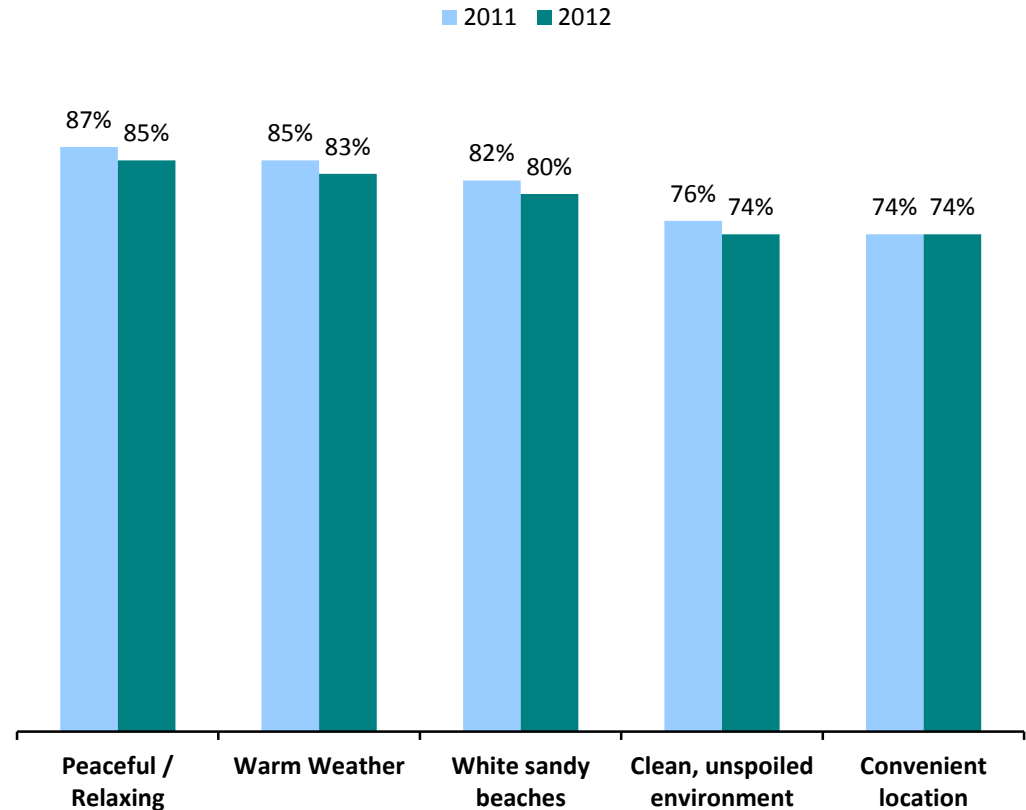
Travel Planning

Travel Decision Influences*		
	2011	2012
	A	B
Total Respondents	206	204
Peaceful / Relaxing	87%	85%
Warm weather	85%	83%
White sandy beaches	82%	80%
Clean, unspoiled environment	76%	74%
Convenient location	74%	74%
A safe destination	77%	73%
Good value for the money	74%	72%
Upscale accommodations	57%	51%
Reasonably priced lodging	71%B	62%
Plenty to see and do	63%	61%
Affordable dining	61%	61%
A "family" atmosphere	63%B	53%

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

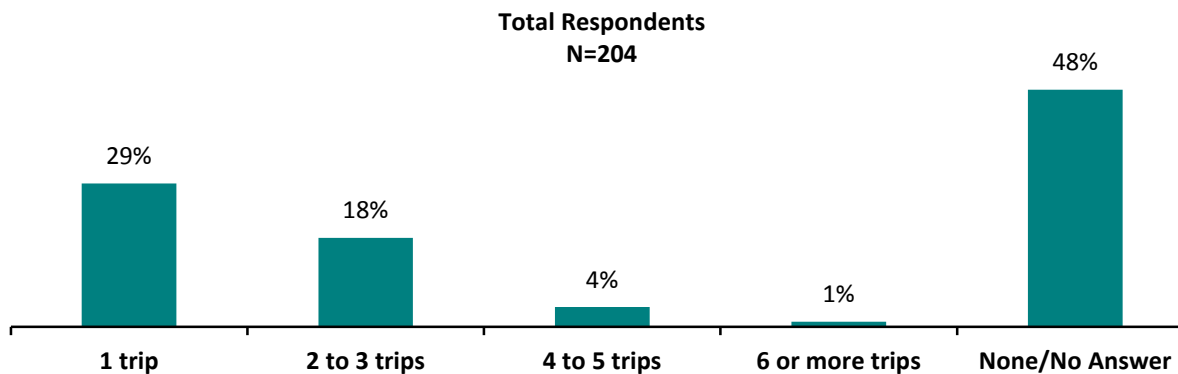
Mode of Transportation		
	2011	2012
	A	B
Total Respondents	206	204
Fly	64%	71%
Drive a personal vehicle	26%	23%
Drive a rental vehicle	7%	6%
Drive an RV	2%	-
Other/No Answer (NET)	1%	1%

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

Airport Used		
	2011	2012
	A	B
Total Respondents	132	145
SW Florida Int'l (Fort Myers)	63%	82%A
Miami Int'l	15%B	8%
Orlando Int'l	10%B	2%
Tampa Int'l	3%	2%
Ft. Lauderdale Int'l	4%	3%
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 SW Florida Int'l (in Past Year)



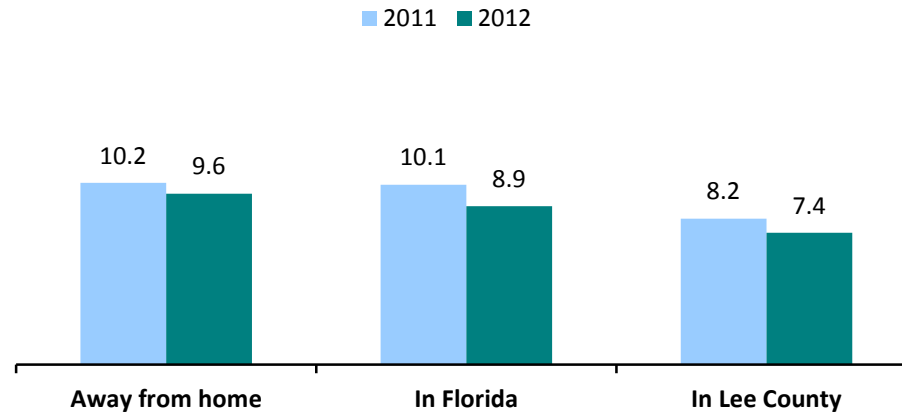
Q40. In the past year, how many trips have you taken where you used Southwest Florida International airport (Fort Myers) for your air travel?
Note: New question added in January 2012.

Trip Profile

Trip Length Mean # of Days			
	2011	2012	% Change
	A	B	
Total Respondents	206	204	
Away from home	10.2	9.6	-5.9%
In Florida	10.1	8.9	-11.9%
In Lee County	8.2	7.4	-12.9%

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

Trip Length (mean # of days)

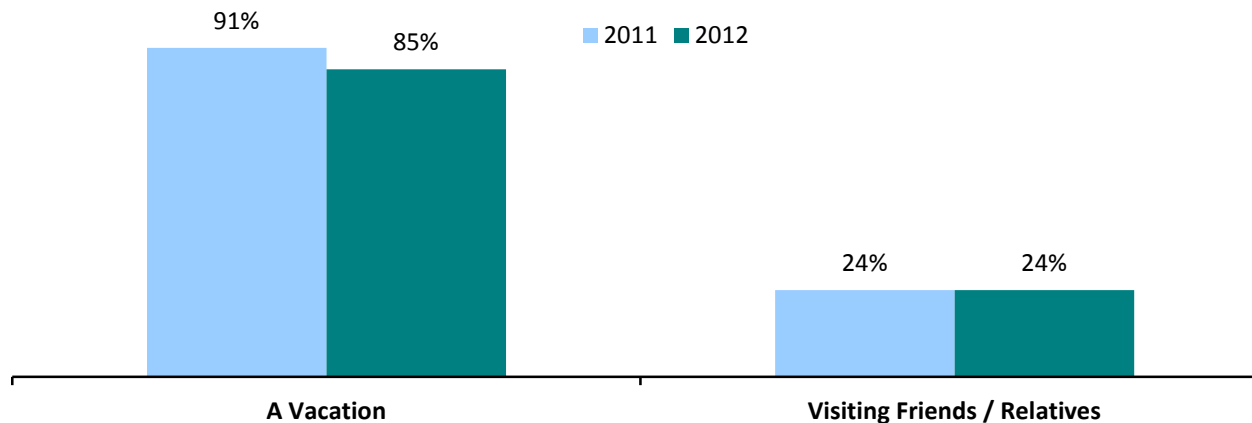


Trip Profile

Reason(s) for Visit		
	2011	2012
	A	B
Total Respondents	206	204
A Vacation	91%	85%
Visiting Friends / Relatives	24%	24%
Other Business Trip	<1%	3%
Personal Business	2%	2%
Sporting Event(s)	-	1%
A Convention / Trade Show	-	<1%
A Conference / Meeting	1%	-
Other/No Answer	1%	<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	206	204	36*	27*	89	124	43*	179
First-time visitor	27%	32%	11%	N/A	22%	33%	47%	33%
Repeat visitor	72%	68%	87%	N/A	78%	67%	51%	66%
No Answer	1%	<1%	3%	N/A	-	-	2%	1%

Q15: Is this your first visit to Lee County?

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

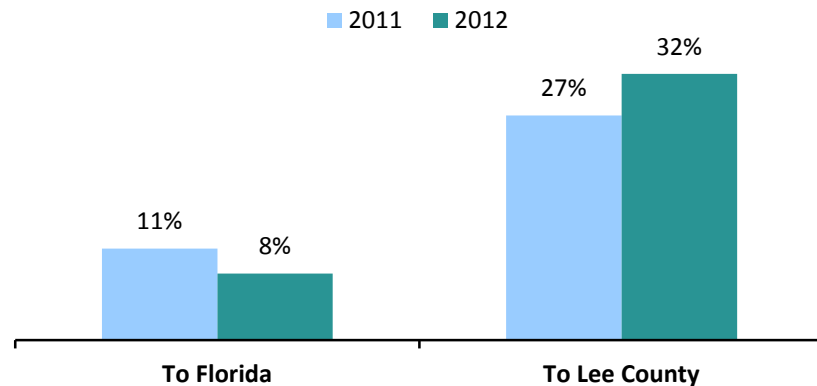
**N/A: Insufficient number of responses for statistical analysis (N<30).

First Time Visitors to Florida		
	2011	2012
Total Respondents	206	204
	A	B
Yes, first-time visitor	11%	8%
No	70%	76%
No answer	1%	2%
<i>FL Residents*</i>	18%	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



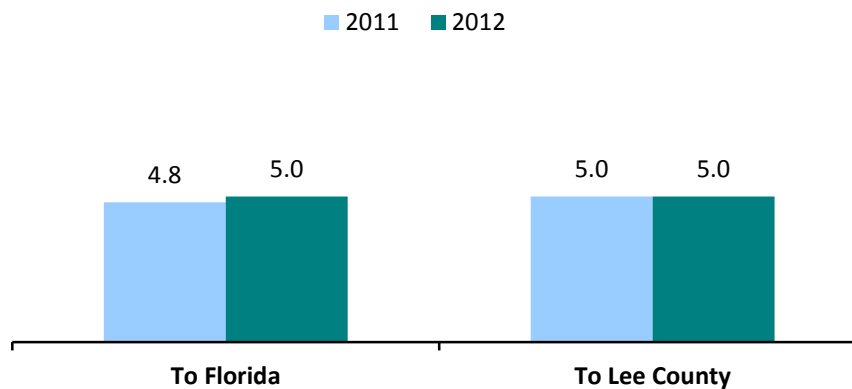
Trip Profile

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	145(FL res. Excl)	156(FL res. Excl)	149	138
Number of visits	4.8	5.0	5.0	5.0

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?

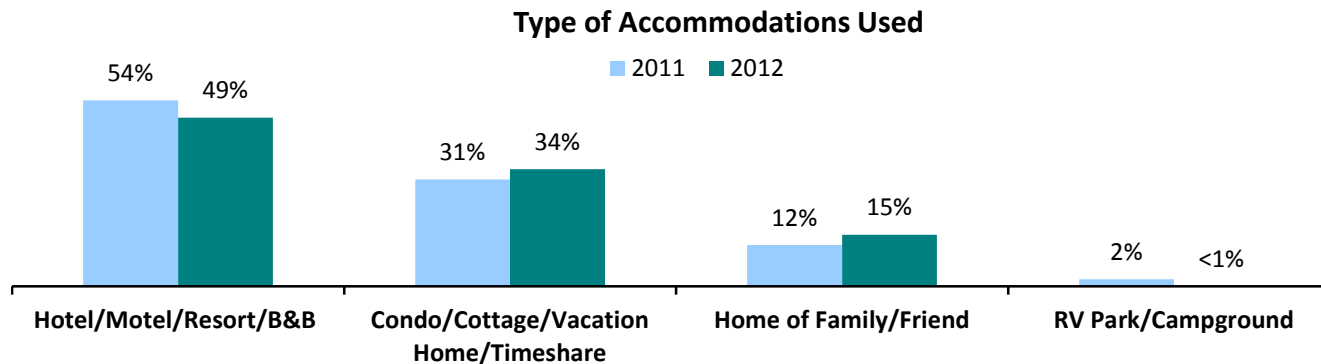
Previous Visits in Five Years



Trip Profile

Type of Accommodations Used		
	2011	2012
	A	B
Total Respondents	206	204
<u>Hotel/Motel/Resort/B&B (NET)</u>	<u>54%</u>	<u>49%</u>
At a hotel/motel/historic inn	32%	30%
At a resort	21%	19%
At a Bed and Breakfast	1%	-
<u>Condo/Cottage/Vacation Home/Timeshare (NET)</u>	<u>31%</u>	<u>34%</u>
Rented home/condo	20%	20%
Owned home/condo	8%	9%
Borrowed home/condo	4%	5%
At the home of family or a friend	12%	15%
RV Park/Campground (NET)	2%	<1%
Daytripper (No Accommodations)	1%	1%

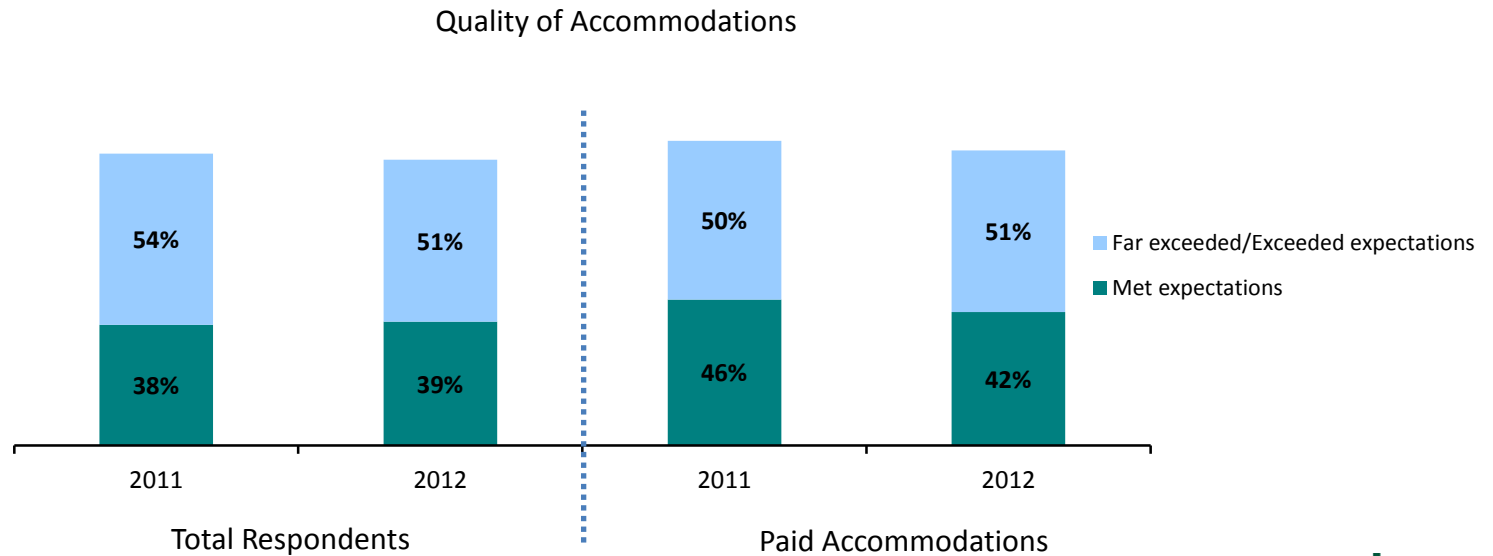
Q20: Are you staying overnight (either last night or tonight):



Trip Profile

Quality of Accommodations				
	Total Respondents		Paid Accommodations	
	2011	2012	2011	2012
	A	B	A	B
Respondents	206	204	156	141
Far exceeded/Exceeded expectations	54%	51%	50%	51%
Met your expectations	38%	39%	46%	42%
Did not meet/Far below expectations	2%	2%	2%	3%
No Answer	6%	7%	3%	4%

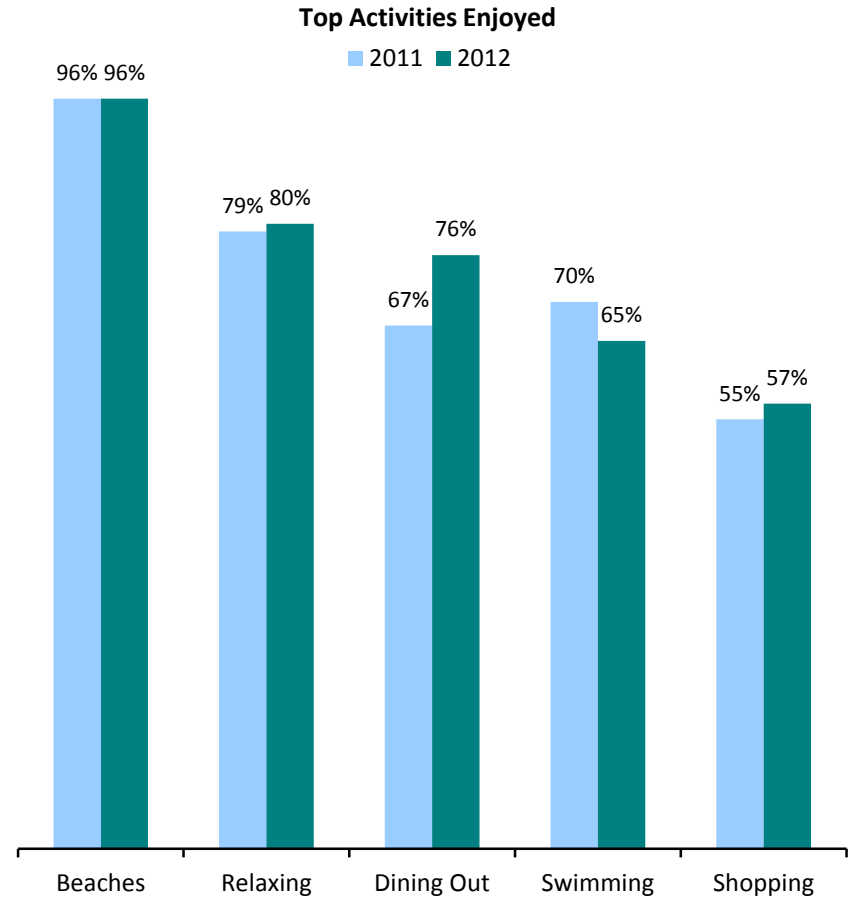
Q21: How would you describe the quality of your accommodations? Do you feel they:



Trip Activities

Activities Enjoyed		
	2011	2012
	A	B
Total Respondents	206	204
Beaches	96%	96%
Relaxing	79%	80%
Dining Out	67%	76%A
Swimming	70%	65%
Shopping	55%	57%
Shelling	37%	37%
Sightseeing	33%	35%
Visiting Friends/Relatives	25%	24%
Watching Wildlife	22%	22%
Photography	21%	22%
Attractions	22%	21%
Bars / Nightlife	15%	16%
Exercise / Working Out	12%	12%
Bicycle Riding	12%	10%
Birdwatching	12%	10%
Fishing	7%	8%
Parasailing / Jet Skiing	9%	7%
Boating	8%	7%
Guided Tour	8%	6%
Kayaking / Canoeing	7%	6%
Golfing	6%	6%
Miniature Golf	8%	5%
Cultural Events	5%	2%
Scuba Diving / Snorkeling	2%	1%
Sporting Event	2%	1%
Tennis	1%	1%
Other	3%	1%
No Answer	-	1%

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

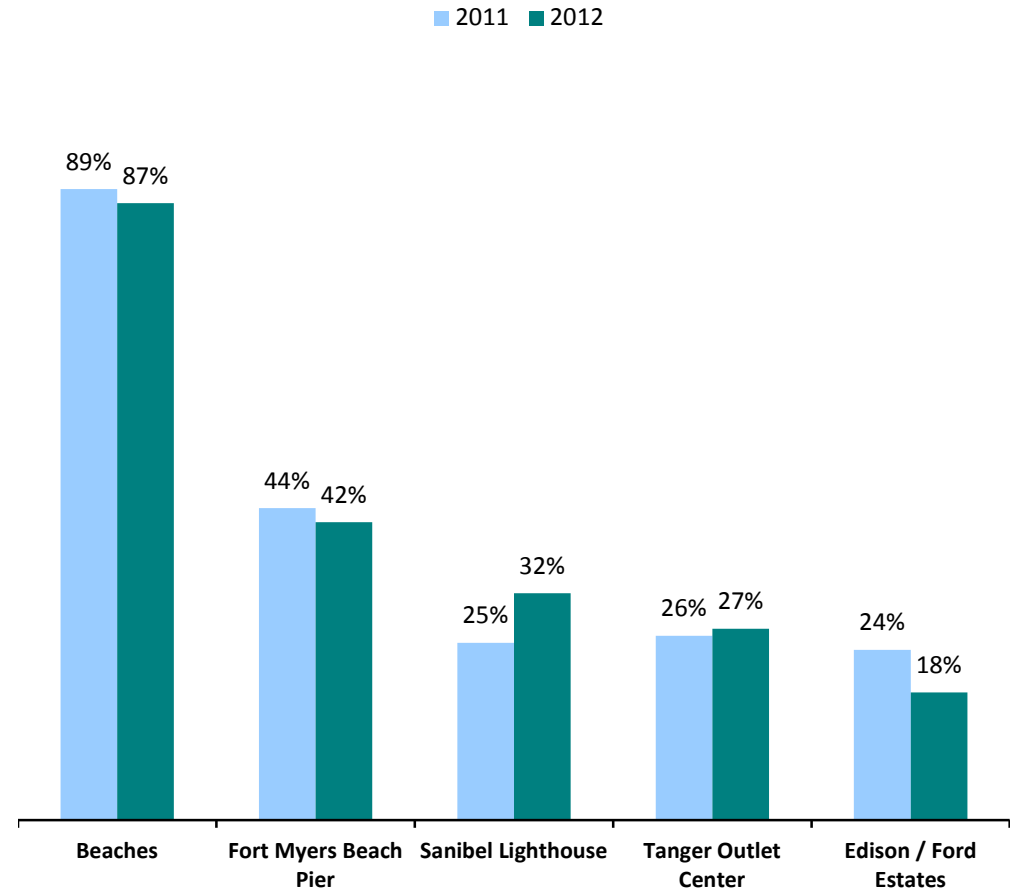


Trip Activities

Attractions Visited		
	2011	2012
	A	B
Total Respondents	206	204
Beaches	89%	87%
Fort Myers Beach Pier	44%	42%
Sanibel Lighthouse	25%	32%
Tanger Outlet Center	26%	27%
Edison / Ford Estates	24%	18%
Miromar Outlets Mall	20%	16%
Coconut Point Mall	13%	13%
Ding Darling National Wildlife Refuge	10%	12%
Shell Factory and Nature Park	7%	12%
Edison Mall	10%	11%
Periwinkle Place	14%	10%
Bell Tower Shops	12%	10%
Gulf Coast Town Center	6%	8%
Manatee Park	2%	5%
Bailey-Matthews Shell Museum	1%	5%A
Babcock Wilderness Adventures	1%	1%
Broadway Palm Dinner Theater	1%	1%
Barbara B. Mann Performing Arts Hall	1%	-
Other	5%	6%
None/No Answer	1%	4%

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

Top Attractions Visited



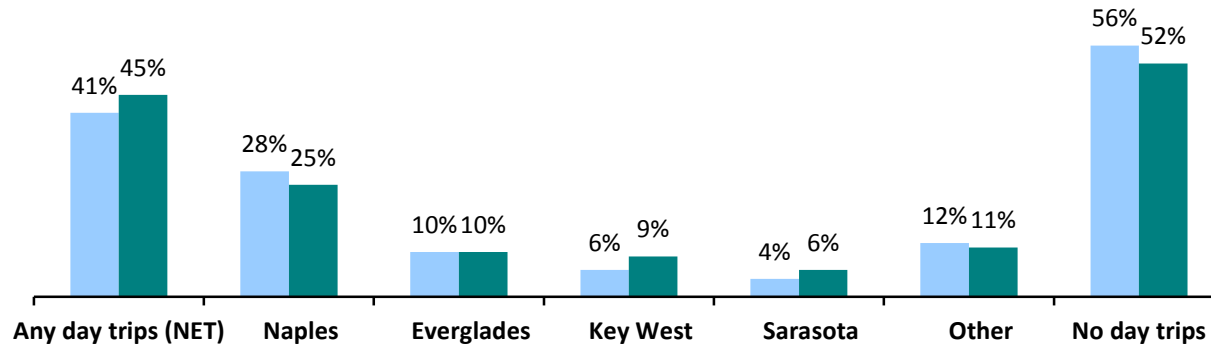
Trip Activities

Day Trips Outside Lee County		
	2011	2012
	A	B
Total Respondents	206	204
<u>Any day trips (NET)</u>	<u>41%</u>	<u>44%</u>
<i>Naples</i>	28%	25%
<i>Everglades</i>	10%	10%
<i>Key West</i>	6%	9%
<i>Sarasota</i>	4%	6%
<i>Other</i>	12%	11%
<u>No day trips</u>	<u>56%</u>	<u>52%</u>
No Answer	9%	11%

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

Day Trips Outside Lee County

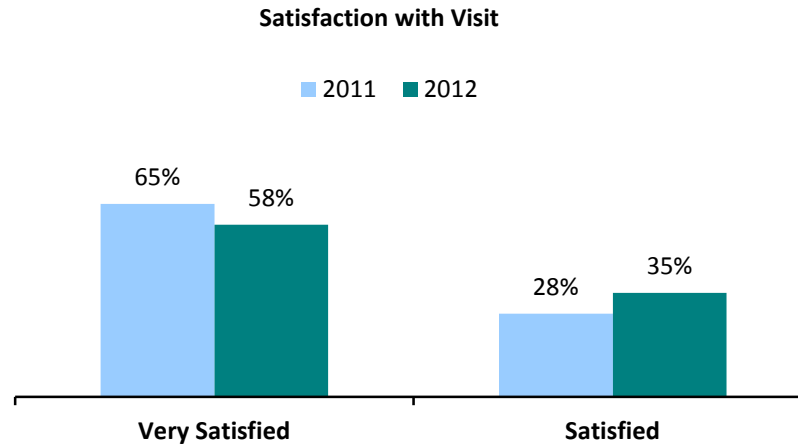
■ 2011 ■ 2012



Lee County Experience

Satisfaction with Visit		
	2011	2012
	A	B
Total Respondents	206	204
<u>Very Satisfied/Satisfied</u>	<u>93%</u>	<u>94%</u>
<i>Very Satisfied</i>	65%	58%
<i>Satisfied</i>	28%	35%
Neither	1%	2%
Dissatisfied/Very Dissatisfied	1%	1%
Don't know/no answer	4%	4%

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



Future Plans

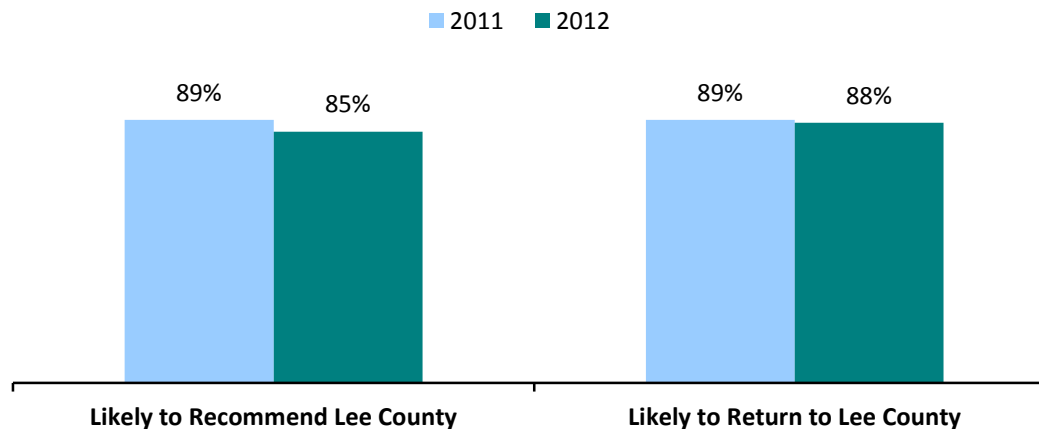
Likelihood to Recommend/Return to Lee County		
	2011	2012
	A	B
Total Respondents	206	204
Likely to Recommend Lee County	89%	85%
Likely to Return to Lee County	89%	88%
Base: Total Respondents Planning to Return	184	180
Likely to Return Next Year	53%	57%

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?

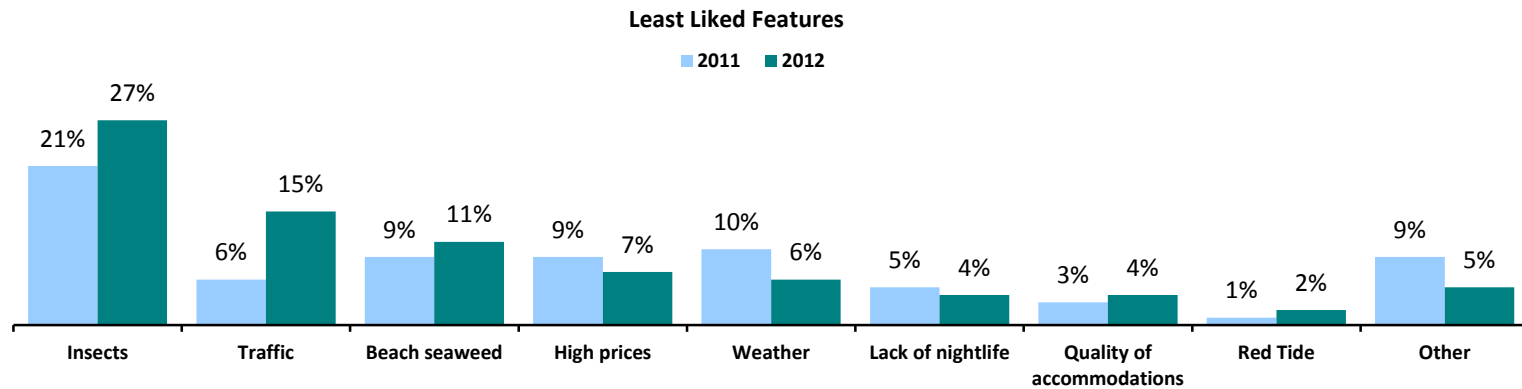
Likelihood to Recommend/Return to Lee County (Responded "Yes")



Trip Activities

Least Liked Features		
	2011	2012
	A	B
Total Respondents	206	204
Insects	21%	27%
Traffic	6%	15%A
Beach seaweed	9%	11%
High prices	9%	7%
Weather	10%	6%
Lack of nightlife	5%	4%
Quality of accommodations	3%	4%
Red Tide	1%	2%
Other	9%	5%
Nothing/No Answer (NET)	45%	43%

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

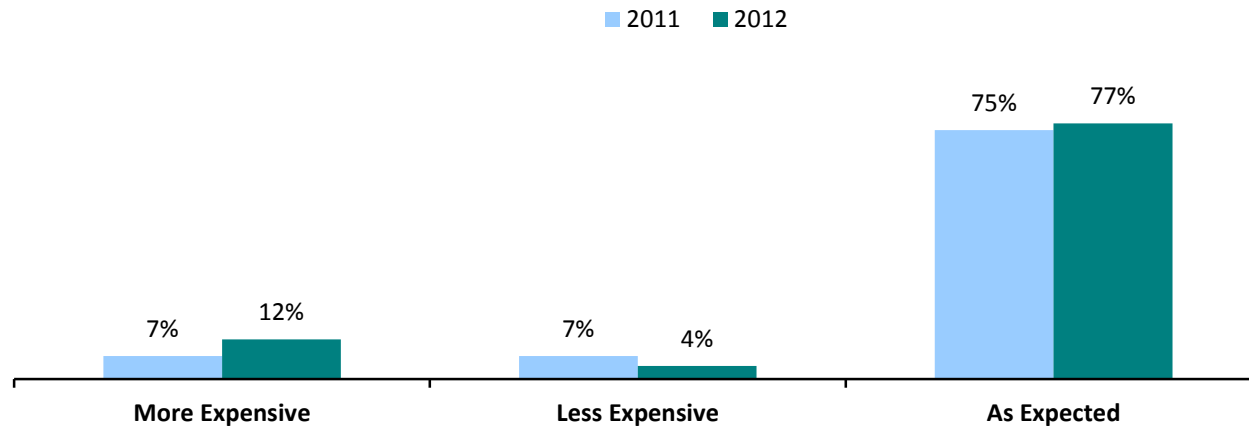


Trip Activities

Perception of Lee County as Expensive		
	2011	2012
	A	B
Total Respondents	206	204
More Expensive	7%	12%
Less Expensive	7%	4%
As Expected	75%	77%
Don't know/No Answer (NET)	11%	6%

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	206	204
Age of respondent (mean)	48.5	48.1
Annual household income (mean)	\$97,064	\$96,648
Martial Status		
Married	73%	70%
Single	14%	12%
Vacations per year (mean)	3.2	2.7
Short getaways per year (mean)	3.9	3.7

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	206	204
Family	31%	27%
Couple	47%	47%
Single	7%	6%
Group of couples/friends	11%	19%A
Mean travel party size	3.0	2.8
Mean adults in travel party	2.6	2.6

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	206	204
<u>Traveling with any Children (net)</u>	<u>15%</u>	<u>14%</u>
Any younger than 6	7%	4%
Any ages 6-11	6%	7%
Any 12-17 years old	6%	7%
No Children	85%	86%

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	53%	58%	133,071	139,239	4.6%
Friends/Relatives	47%	42%	119,068	101,063	-15.1%
<i>Total Visitation</i>			252,139	240,302	-4.7%

Paid Accommodations Visitors					
	%		Visitor Estimates		
Country of Origin	2011	2012	2011	2012	% Change
United States	65%	<77%>	86,155	106,651	23.8%
Germany	13%	13%	17,060	17,775	4.2%
UK	<12%>	2%	15,354	2,963	-80.7%
Canada	4%	1%	5,971	1,975	-66.9%
BeNeLux	1%	1%	1,706	1,975	15.8%
Switzerland	1%	1%	1,706	1,975	15.8%
Scandinavia	1%	1%	853	1,975	131.5%
Other Europe	1%	1%	853	1,975	131.5%
France	2%	1%	2,559	988	-61.4%
Austria	1%	-	853	-	-
Other International	0%	1%	-	988	-

U.S. Region of Origin	2011	2012	2011	2012	% Change
Florida	28%	19%	23,885	20,738	-13.2%
South (including Florida)	46%	39%	39,239	41,475	5.7%
Midwest	30%	30%	25,591	31,600	23.5%
Northeast	15%	22%	12,795	23,700	85.2%
West	-	4%	-	3,950	-
No Answer	10%	6%	8,530	5,925	-30.5%

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

2012 Top DMAs (Paid Accommodations)		
New York	9%	9,875
Tampa-Saint Petersburg (Sarasota)	7%	7,900
West Palm Beach-Fort Pierce	5%	4,938
Chicago	5%	4,938
Washington, DC (Hagerstown)	5%	4,938
Miami-Fort Lauderdale	4%	3,950
Dayton	4%	3,950
Columbus, OH	3%	2,963
Cincinnati	3%	2,963

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

Occupancy Data Analysis September 2012

Property managers representing 113 properties in Lee County were interviewed for the September 2012 Occupancy Survey between September 1 and September 15, 2012, a sample considered accurate to plus or minus 9.2 percentage points at the 95% confidence level.

Property managers representing 103 properties in Lee County were interviewed for the September 2011 Occupancy Survey between September 1 and September 15, 2011, a sample considered accurate to plus or minus 9.7 percentage points at the 95% confidence level.

Occupancy/Daily Rates

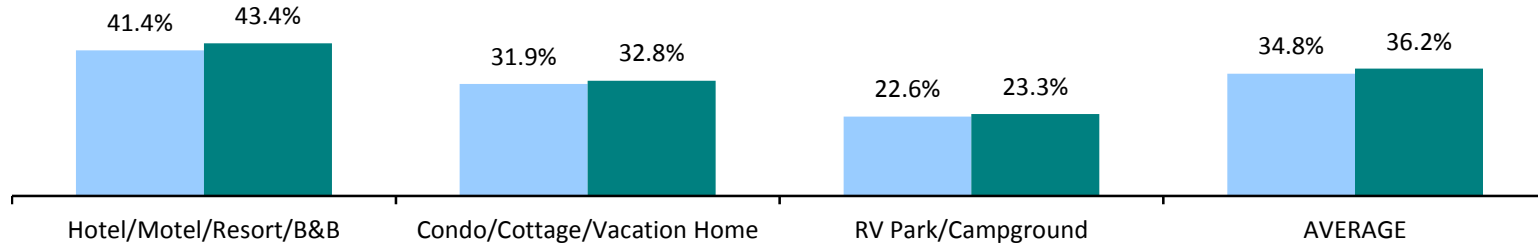
	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
Property Managers Responding	106	101		107	100		106/107	101/100	
Hotel/Motel/Resort/B&B	41.4%	43.4%	4.8%	\$101.38	\$101.43	0.1%	\$41.99	\$44.01	4.8%
Condo/Cottage/Vacation Home	31.9%	32.8%	2.8%	\$107.38	\$114.54	6.7%	\$34.27	\$37.56	9.6%
RV Park/Campground	22.6%	23.3%	3.1%	\$41.80	\$41.47	-0.8%	\$9.43	\$9.65	2.3%
AVERAGE	34.8%	36.2%	4.0%	\$93.80	\$95.10	1.4%	\$32.67	\$34.45	5.4%

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

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

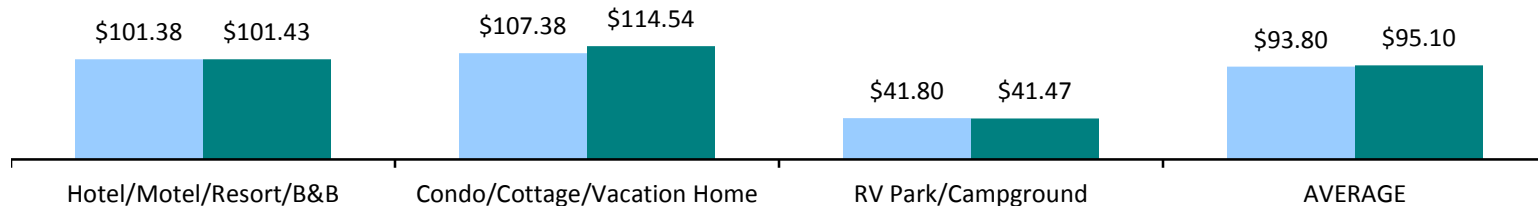
Average Occupancy Rate

■ 2011 ■ 2012



Average Daily Rate

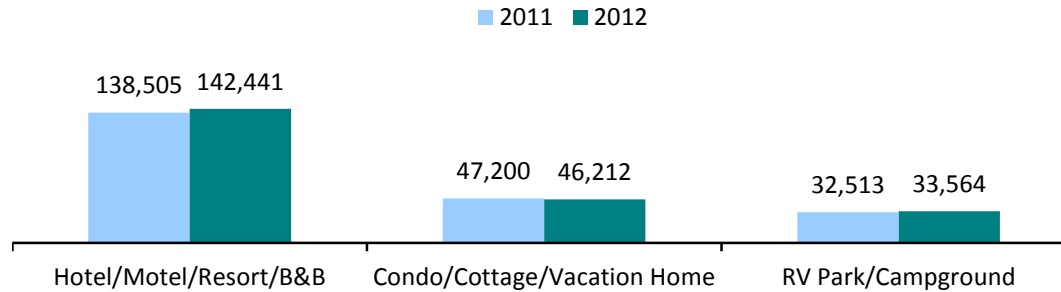
■ 2011 ■ 2012



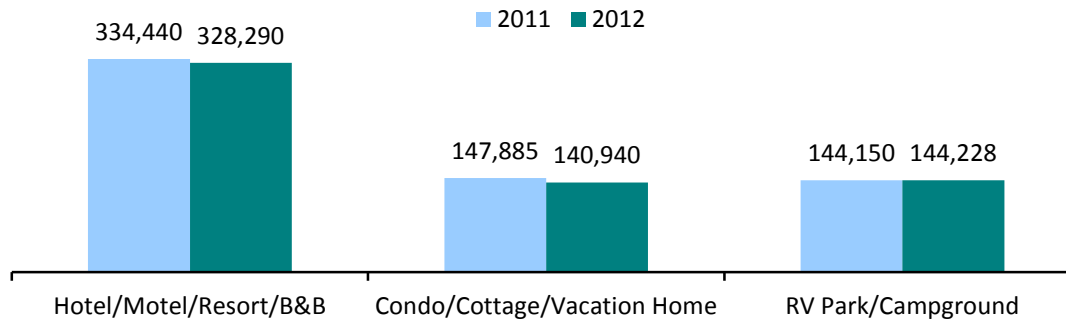
Room/Unit/Site Nights

	Occupied Room Nights			Available Room Nights		
	2011	2012	% Change	2011	2012	% Change
Hotel/Motel/Resort/B&B	138,505	142,441	2.8%	334,440	328,290	-1.8%
Condo/Cottage/Vacation Home	47,200	46,212	-2.1%	147,885	140,940	-4.7%
RV Park/Campground	32,513	33,564	3.2%	144,150	144,228	0.1%
Total	218,218	222,217	1.8%	626,475	613,458	-2.1%

Occupied Room Nights



Available Room Nights



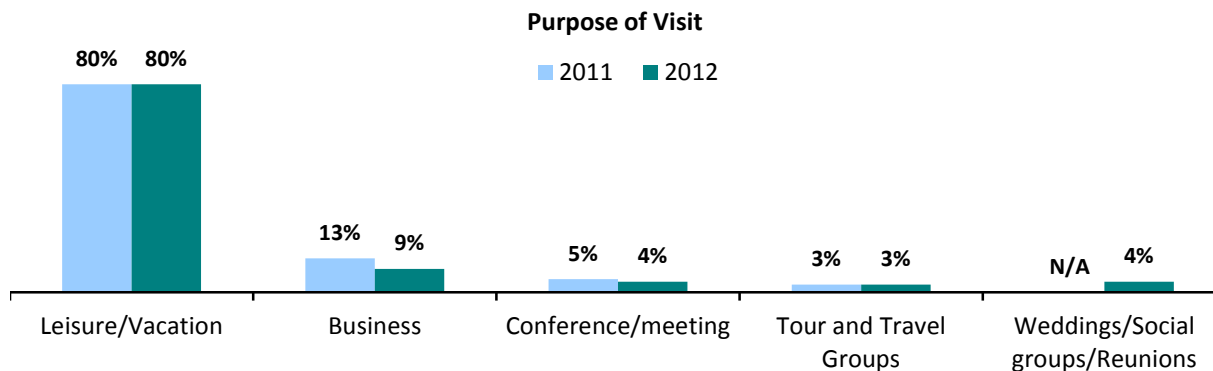
Lodging Management Estimates

Guest Profile		
	2011	2012
	A	B
Property Managers Responding	92	90
<u>Purpose of Visit</u>		
Leisure/Vacation	80%	80%
Business	13%	9%
Conference/meeting	5%	4%
Tour and Travel Groups	3%	3%
Weddings/Social groups/Reunions (net)	N/A	4%
Property Managers Responding	101	89
Average guests per room	2.4	2.6
Property Managers Responding	100	90
Average length of stay in nights	4.6	5.7

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

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

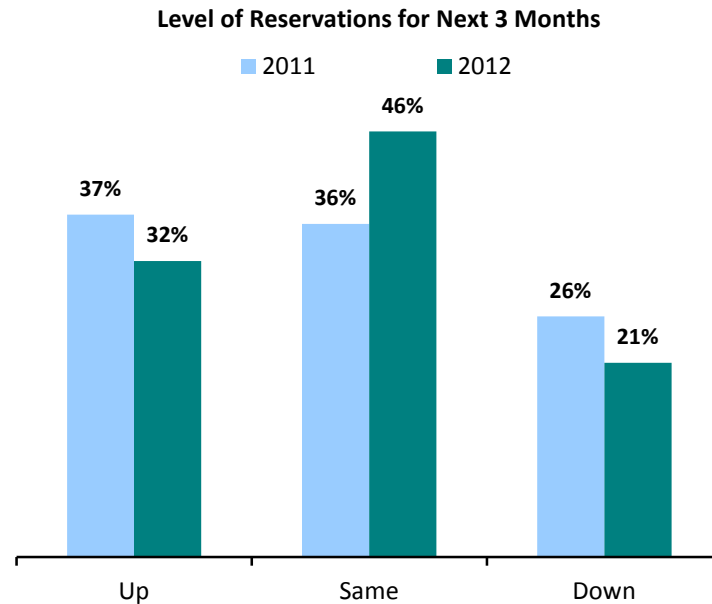
Q19: What was the average length of stay (in nights) of your guests in September?



Occupancy Barometer

Level of Reservations for Next 3 Months Compared to Last Year		
	2011	2012
	A	B
Total Respondents	107	100
<u>Up/Same (net)</u>	<u>73%</u>	<u>78%</u>
Up	37%	32%
Same	36%	46%
Down	26%	21%

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

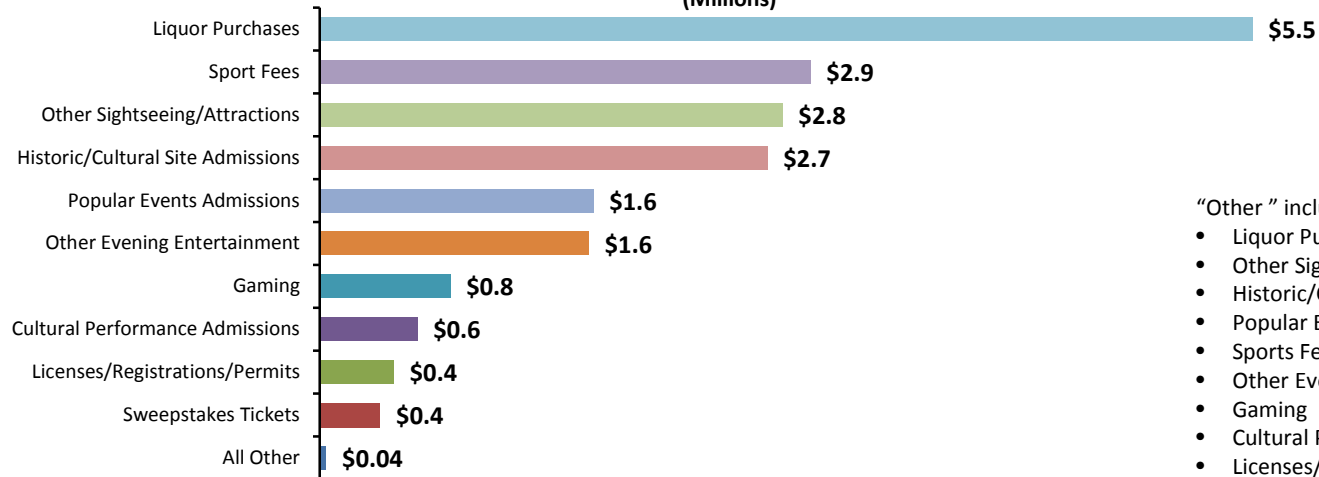


Economic Impact Analysis
September 2012

Total Visitor Expenditures by Spending Category

TOTAL EXPENDITURES			
	2011	2012	% Change
<u>TOTAL</u>	<u>\$95,264,129</u>	<u>\$104,389,192</u>	<u>-9.6%</u>
Food and Beverages	\$25,031,876	\$28,200,917	12.67%
Shopping	\$24,535,767	\$26,985,598	10.0%
Lodging Accommodations	\$20,469,854	\$21,132,044	3.2%
Ground Transportation	\$8,082,473	\$8,784,803	-8.7%
Other	\$17,144,159	\$19,285,830	12.5%

September 2012 "Other" Expenditures
(Millions)



"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

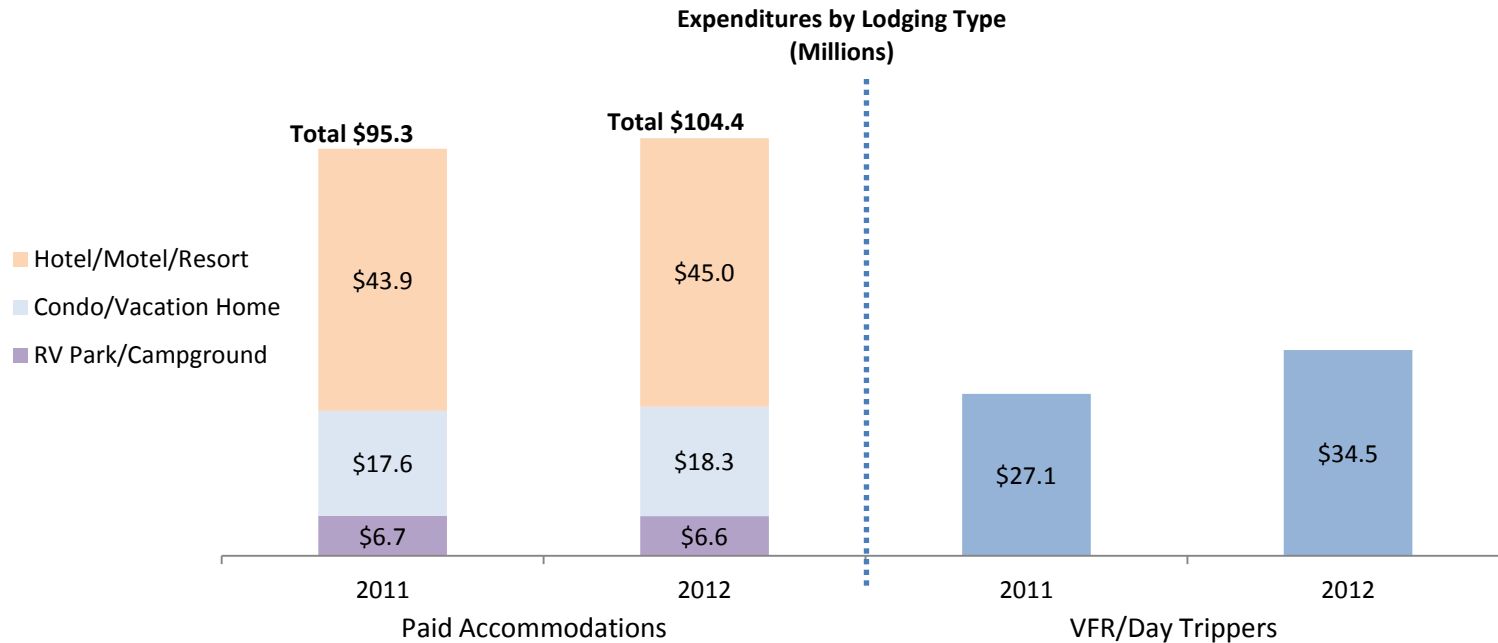
TOTAL EXPENDITURES						
	Staying Paid Accommodations			Visiting Friends and Relatives/Day Trippers		
	2011	2012	% Change	2011	2012	% Change
TOTAL	<u>\$68,176,524</u>	<u>\$69,930,031</u>	<u>-2.6%</u>	<u>\$27,087,605</u>	<u>\$34,459,161</u>	<u>27.2%</u>
Lodging Accommodations	\$20,469,854	\$21,132,044	3.2%	\$0	\$0	-
Food and Beverages	\$15,785,097	\$16,576,454	5.0%	\$9,246,779	\$11,624,463	25.7%
Shopping	\$16,072,231	\$16,071,599	-	\$8,463,536	\$10,913,999	29.0%
Ground Transportation	\$5,097,262	\$5,515,878	8.2%	\$2,985,211	\$3,268,925	9.5%
Other	\$10,752,080	\$10,634,056	-1.1%	\$6,392,079	\$8,651,774	35.4%

“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>\$95,264,129</u>	<u>\$104,389,192</u>	<u>9.6%</u>	<u>100%</u>	<u>100%</u>
Visiting Friends & Relatives/Day Trippers	\$27,087,605	\$34,459,161	-9.7%	28%	33%
<u>Paid Accommodations</u>	<u>\$68,176,524</u>	<u>\$69,930,031</u>	<u>2.6%</u>	<u>72%</u>	<u>67%</u>
<i>Hotel/Motel/Resort/B&B</i>	<i>\$43,923,260</i>	<i>\$44,978,721</i>	2.4%	46%	43%
<i>Condo/Cottage/Vacation Home</i>	<i>\$17,584,076</i>	<i>\$18,310,860</i>	4.1%	18%	18%
<i>RV Park/Campground</i>	<i>\$6,669,188</i>	<i>\$6,640,450</i>	-0.4%	7%	6%



Appendix
September 2012

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 from September 1 – September 15, 2012. Information was provided by 104 Lee County lodging properties.

Lodging Type	Number of Interviews
Hotel/Motel/Resort/B&Bs	63
Condo/Cottage/Vacation Home/Timeshare	26
RV Park/Campground	15
Total	104