



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

**May 2012 Visitor Profile and Occupancy Analysis
July 3, 2012**

Prepared for:

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

Prepared by:



Executive Summary

May 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 May 2012, Lee County hosted more than 188,000 visitors staying in paid accommodations and about 209,000 staying with friends or relatives while visiting, for a total of 397,900 visitors.
- Visitation among paid accommodations guests decreased year-over-year (-17.6%) as did visitation among those staying with friends or relatives (-3.5%). As a result, the total number of visitors during May 2012 was down 10.8% from the prior year.

Estimated Visitation	2011	2012	% Change
Paid Accommodations	229,124	188,747	-17.6%
Friends/Relatives	216,705	209,155	-3.5%
Total Visitation	445,829	397,902	-10.8%

Visitor Expenditures

- May 2012 visitors spent an estimated \$182 million during their stay. Total spending for May 2012 was down 10.8% from May 2011 but was substantially higher than May 2010. Total year to date estimated expenditures are down as well (-3.6%).
- Paid accommodations guests contributed \$97.5 million to the total but were down 10.9% from May 2011. Those visiting friends and relatives contributed \$84.9 million, also a notable decline year-over-year (-10.8%).

Estimated Expenditures	2011	2012	% Change
Paid Accommodations	\$109,425,460	\$97,468,809	-10.9%
Friends/Relatives	\$95,173,324	\$84,942,168	-10.8%
Total Expenditures	\$204,598,784	\$182,410,977	-10.8%

- *Note: While performance on both estimated visitation and visitor spending for May 2012 fell short of May 2011, that is in the context of May 2011 being particularly robust. Looking at the five year trends from 2008 through 2012, May this year tended to be stronger than 2009 and 2010 but a bit weaker than 2008.*

Visitor Origin

- The majority of May 2012 visitors staying in paid accommodations were U.S. residents (85%) – on par with last year (83%). Germany and UK supplied the greatest number of international visitors staying in paid accommodations. Lee County experienced a notable increase in the estimated number of UK visitors during May 2012 versus a year ago, while estimates of Canadian visitors were down.
- Half of May 2012 domestic paid accommodations guests came from the Midwest (47%). One in four are from the Northeast (25%) or the South (22%).
- The top two domestic feeder markets for May 2012 paid accommodations guests were Chicago (8%) and New York (7%) followed by Indianapolis, Providence, Pittsburgh, and Tampa.

2012 Top DMAs (Paid Accommodations)

Chicago	8%	13,017
New York	7%	10,414
Indianapolis	5%	7,810
Providence-New Bedford	5%	7,810
Pittsburgh	4%	6,509
Tampa-Saint Petersburg	4%	6,509
Cincinnati	3%	5,207
Cleveland-Akron	3%	5,207
Detroit	3%	5,207
Minneapolis-Saint Paul	3%	5,207
Orlando-Daytona Beach-Melbourne	3%	5,207

Visitors Staying in Paid Accommodations

Country of Origin	%		Visitor Estimates		% Change
	2011	2012	2011	2012	
United States	83%	85%	191,163	160,110	-16.2%
Germany	4%	6%	9,490	10,414	9.7%
UK	1%	3%	1,356	5,207	284.1%
Ireland	-	2%	-	3,905	-
France	-	2%	-	3,905	-
BeNeLux	1%	1%	2,712	1,302	-52.0%
Switzerland	1%	1%	2,712	1,302	-52.0%
Canada	<7%>	1%	16,269	1,302	-92.0%
Austria	1%	-	1,356	-	-
Scandinavia	1%	-	1,356	-	-
Other	1%	1%	2,712	1,302	-52.0%

Visitors Staying in Paid Accommodations

U.S. Region of Origin	%		Visitor Estimates		% Change
	2011	2012	2011	2012	
Florida	9%	11%	16,269	18,224	12.0%
South (including Florida)	16%	22%	31,183	35,146	12.7%
Midwest	51%	47%	97,615	75,499	-22.7%
Northeast	23%	25%	43,384	40,353	-7.0%
West	2%	2%	4,067	3,905	-4.0%
No Answer	8%	3%	14,913	5,207	-65.1%

< > 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

- May 2012 visitors tended to have a long lead-time for trip planning with the majority of visitors talking about, choosing, and making reservations three months or more before their trip – not unlike reports from May 2011 visitors:
 - 78% started talking about trip in that timeframe (vs. 79% May 2011)
 - 68% chose Lee County for trip (vs. 70% May 2011)
 - 49% made lodging reservation (vs. 56% May 2011)
- While planning their trip, May 2012 visitors were more likely to mention visiting www.fortmyers-sanibel.com than their 2011 counterparts (20% vs. 12%).
- When talking about coming to Lee County, the attributes that received the highest ratings among May 2012 visitors with regard to influencing their selection were:
 - *Warm weather* (93%),
 - *Peaceful/relaxing* (92%), and
 - *White sandy beaches* (86%).

Visitor Profile

- Three-fourths of May 2012 visitors flew to the area (75%), and most flew into Southwest Florida International Airport (85%) – the same pattern observed among May 2011 visitors.
- Close to half of visitors interviewed indicated they were staying in hotel/motel/resorts (46%) during their trip. Slightly fewer said they were staying in a condo/vacation home property (43%). Only one in ten mentioned staying at the home of a friend or family member. Half felt that the quality of accommodations *far exceeded* or *exceeded expectations* (49%) in May 2012 – a slight improvement over last May (41%).
- The top activities visitors enjoyed in Lee County during May 2012 were beaches (95%), relaxing (81%), dining out (71%), and to a lesser extent, shopping (62%) or swimming (61%).

Visitor Profile (cont'd)

- Overall, visitor satisfaction remains extremely high – nearly all (97%) of May 2012 visitors reported being *very satisfied* or *satisfied* with their visit. Almost as many indicated they are likely to return to Lee County (91%), and two-thirds of them said they will return next year (67% vs. 56% May 2011). Nine in ten said they will also recommend Lee County to a friend over other areas in Florida (89%).
- The most prevalent dislike about the Lee County area cited by May 2012 visitors was insects (18%), which also ranked highest among May 2011 visitors but at a much higher level (39%). Importantly, about half said there were no features they disliked during their Lee County visit (48%).
- The demographic composition of May 2012 visitors can be summarized as follows:
 - 51 years of age on average
 - \$105,350 household income on average
 - 72% married
 - 38% traveling as a family
 - 38% traveling as a couple
 - 79% traveling *without* children
 - 3 people in travel party on average

Lodging Industry Assessments

- For the Lee County lodging industry in total, there was a decline in *available* room nights (-1.2%) from May 2011 to May 2012 and an even greater decline in *occupied* room nights (-6.7%). This pattern was observed for the hotel/motel/resort and RV park/campground lodging categories. There was a slight increase in *occupied* room nights (+1.0%) for condos/vacation homes, but it was countered by an increase in *available* room nights (+1.3%) for condo/vacation homes.

	Occupied Room Nights			Available Room Nights		
	2011	2012	% Change	2011	2012	% Change
Hotel/Motel/Resort/B&B	206,151	194,844	-5.5%	359,263	351,788	-2.1%
Condo/Cottage/Vacation Home	66,745	67,402	1.0%	149,916	151,888	1.3%
RV Park/Campground	43,693	33,135	-24.2%	158,680	155,837	-1.8%
Total	316,589	295,381	-6.7%	667,859	659,513	-1.2%

- As a result, the average occupancy rate across the Lee County lodging industry fell from 47.4% in May 2011 to 44.8% in May 2012 (-5.5%). Average occupancy rate was flat year-over-year for condos/vacation homes (-0.3%), but hotels/motels/resorts and RV parks/campgrounds saw a decrease (-3.5% and -22.8% respectively).
- Overall average daily rate dipped very slightly from last May (-0.8%) driven by an estimated decline in ADR for hotels/motels/resorts (-4.0%) and condos/vacation homes (-2.0%). In contrast, RV parks/campgrounds posted an 8.8% increase in ADR.
- The combination of flat ADR and a decline in average occupancy rate translated to a negative impact in RevPAR year-over-year (-6.3%). All property categories suffered from waning performance in RevPAR.

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
Property Managers Responding	122	96		121	94		122/121	96/94	
Hotel/Motel/Resort/B&B	57.4%	55.4%	-3.5%	\$124.92	\$119.88	-4.0%	\$71.68	\$66.40	-7.4%
Condo/Cottage/Vacation Home	44.5%	44.4%	-0.3%	\$147.17	\$144.24	-2.0%	\$65.52	\$64.01	-2.3%
RV Park/Campground	27.5%	21.3%	-22.8%	\$37.74	\$41.05	8.8%	\$10.39	\$8.73	-16.0%
AVERAGE	47.4%	44.8%	-5.5%	\$117.58	\$116.60	-0.8%	\$55.74	\$52.22	-6.3%

Lodging Industry Assessments (cont'd)

- Lee County property managers' optimism about projected reservations in the coming months appeared to be on par with their 2011 counterparts. One-third of managers responding noted that their total level of reservations for the next three months (June, July, August) are up over the same period the prior year (34%) – 33% claimed the same in May 2011. Slightly fewer than half (46%) said reservations for the next three months of 2012 are at least the same as the same time last year (vs. 42% May 2011). Only about two in ten claimed that their reservations are down for the next three months (18% vs. 25% May 2011).

May 2012 Lee County Snapshot

Total May Visitation				
	%		Visitor Estimates	
	2011	2012	2011	2012
Paid Accommodations	51%	47%	229,124	188,747
Friends/Relatives	49%	53%	216,705	209,155
Total Visitation			445,829	397,902

Total Visitor Expenditures			
	2011	2012	% Change
	Total Visitor Expenditures	\$204,598,784	\$182,410,977
Paid Accommodations	\$109,425,460	\$97,468,809	-10.9%

Visitor Origin - Visitors Staying in Paid Accommodations				
	%		Visitor Estimates	
	2011	2012	2011	2012
Florida	9%	11%	16,269	18,224
United States	83%	85%	191,163	160,110
Germany	4%	6%	9,490	10,414
UK	1%	3%	1,356	5,207
Canada	<7%>	1%	16,269	1,302
Other International	5%	6%	10,848	11,716

Average Per Person Per Day Expenditures		
2011	2012	% Change
\$115.87	\$123.05	6.2%

First-Time/Repeat Visitors to Lee County		
	2011	2012
First-time	24%	22%
Repeat	74%	77%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
Property Managers Responding	122	96		121	94		122/121	96/94	
Hotel/Motel/Resort/B&B	57.4%	55.4%	-3.5%	\$124.92	\$119.88	-4.0%	\$71.68	\$66.40	-7.4%
Condo/Cottage/Vacation Home	44.5%	44.4%	-0.3%	\$147.17	\$144.24	-2.0%	\$65.52	\$64.01	-2.3%
RV Park/Campground	27.5%	21.3%	-22.8%	\$37.74	\$41.05	8.8%	\$10.39	\$8.73	-16.0%
AVERAGE	47.4%	44.8%	-5.5%	\$117.58	\$116.60	-0.8%	\$55.74	\$52.22	-6.3%

Calendar YTD 2012 Lee County Snapshot

Total Calendar Year Visitation

	%		Visitor Estimates	
	2011	2012	2011	2012
Paid Accommodations	49%	47%	1,145,523	1,081,777
<u>Friends/Relatives</u>	51%	53%	<u>1,185,934</u>	<u>1,201,774</u>
Total Visitation			2,331,457	2,283,551

Total Visitor Expenditures

	2011	2012	% Change
Total Visitor Expenditures	\$1,572,342,488	\$1,515,406,588	-3.6%
Paid Accommodations	\$1,016,345,197	\$1,005,982,698	-1.0%

Visitor Origin - Visitors Staying in Paid Accommodations

	%		Visitor Estimates	
	2011	2012	2011	2012
Florida	4%	4%	35,993	36,362
United States	86%	83%	982,771	901,481
Germany	2%	5%	18,779	54,543
Canada	7%	4%	81,376	45,453
UK	2%	2%	17,214	18,181
Other International	3%	6%	34,428	62,119

Average Per Person Per Day Expenditures

2011	2012	% Change
\$117.75	\$122.36	3.9%

First-Time/Repeat Visitors to Lee County

	2011	2012
First-time	23%	22%
Repeat	75%	77%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
Hotel/Motel/Resort/B&B	66.6%	69.3%	4.0%	\$152.59	\$157.15	3.0%	\$101.62	\$108.84	7.1%
Condo/Cottage/Vacation Home	69.1%	71.0%	2.7%	\$195.83	\$204.11	4.2%	\$135.38	\$144.91	7.0%
RV Park/Campground	71.7%	68.9%	-3.9%	\$49.58	\$53.22	7.3%	\$35.55	\$36.68	3.2%
AVERAGE	68.4%	70.0%	1.8%	\$137.03	\$143.68	4.9%	\$93.69	\$99.97	6.7%

Visitor Profile Analysis May 2012

A total of 201 interviews were conducted with visitors in Lee County during the month of May 2012. A total sample of this size is considered accurate to plus or minus 6.9 percentage points at the 95% confidence level.

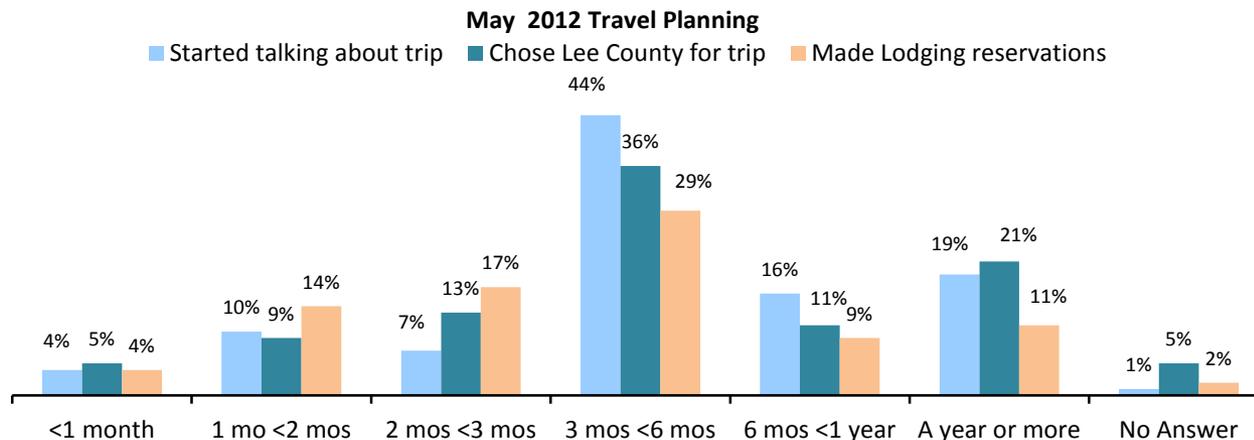
A total of 205 interviews were conducted with visitors in Lee County during the month of May 2011. A total sample of this size is considered accurate to plus or minus 6.8 percentage points at the 95% confidence level.

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	205	201	205	201	205	201
<u>Less than 3 months (NET)</u>	<u>18%</u>	<u>21%</u>	<u>24%</u>	<u>27%</u>	<u>36%</u>	<u>36%</u>
<1 month	2%	4%	4%	5%	4%	4%
1 month - <2 months	5%	10%	8%	9%	14%	14%
2 months - <3 months	11%	7%	12%	13%	18%	17%
<u>3 months or more (NET)</u>	<u>79%</u>	<u>78%</u>	<u>70%</u>	<u>68%</u>	<u>56%</u>	<u>49%</u>
3 months - <6 months	40%	44%	32%	36%	31%	29%
6 months - <1 year	18%	16%	16%	11%	11%	9%
A year or more	21%	19%	21%	21%	14%	11%
No Lodging Reservations Made	N/A	N/A	N/A	N/A	-	13%
No Answer	3%	1%	6%	5%	8%B	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	201
<u>Any (NET)</u>	<u>96%</u>
Laptop computer	71%
Desktop computer	54%
Smartphone (iPhone, Blackberry, etc.)	44%
Tablet (iPad, etc.)	28%
E-Reader (Nook, Kindle, etc.)	5%
Other portable device	4%
None of these	4%
No Answer	-

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)	187	193
<u>Visited web sites (net)</u>	<u>82%</u>	<u>88%</u>
Airline websites	42%	41%
Hotel websites	32%	35%
Booking websites	30%	31%
Search Engines	28%	31%
www.FortMyers-Sanibel.com	12%	20%A
Trip Advisor	14%	18%
Visit Florida	9%	9%
AAA	7%	7%
Facebook	-	5%
Other	17%	17%
None/Didn't visit websites	16%	10%
No Answer	2%	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.

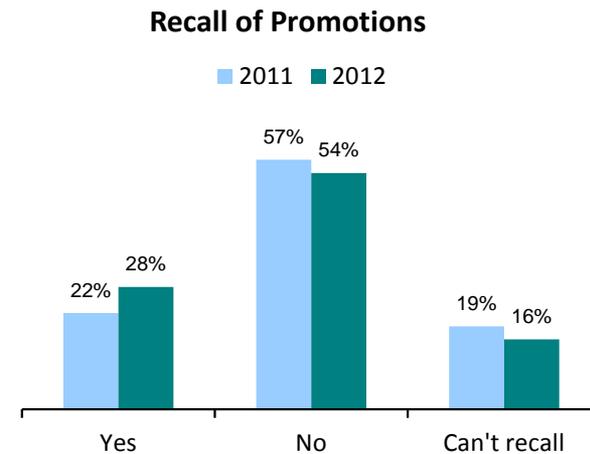
Travel Planning

Travel Information Requested		
	2011	2012
	A	B
Total Respondents	205	201
<u>Requested information (NET)</u>	<u>43%B</u>	<u>30%</u>
<i>Hotel Web Site</i>	26%	18%
<i>Call hotel</i>	12%	8%
<i>VCB website</i>	7%	6%
<i>Visitor Guide</i>	5%	3%
<i>Other</i>	12%B	6%
<u>None/Did not request information</u>	<u>44%</u>	<u>67%A</u>
No Answer	14%B	3%

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	205	201
Yes	22%	28%
No	57%	54%
Can't Recall	19%	16%

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

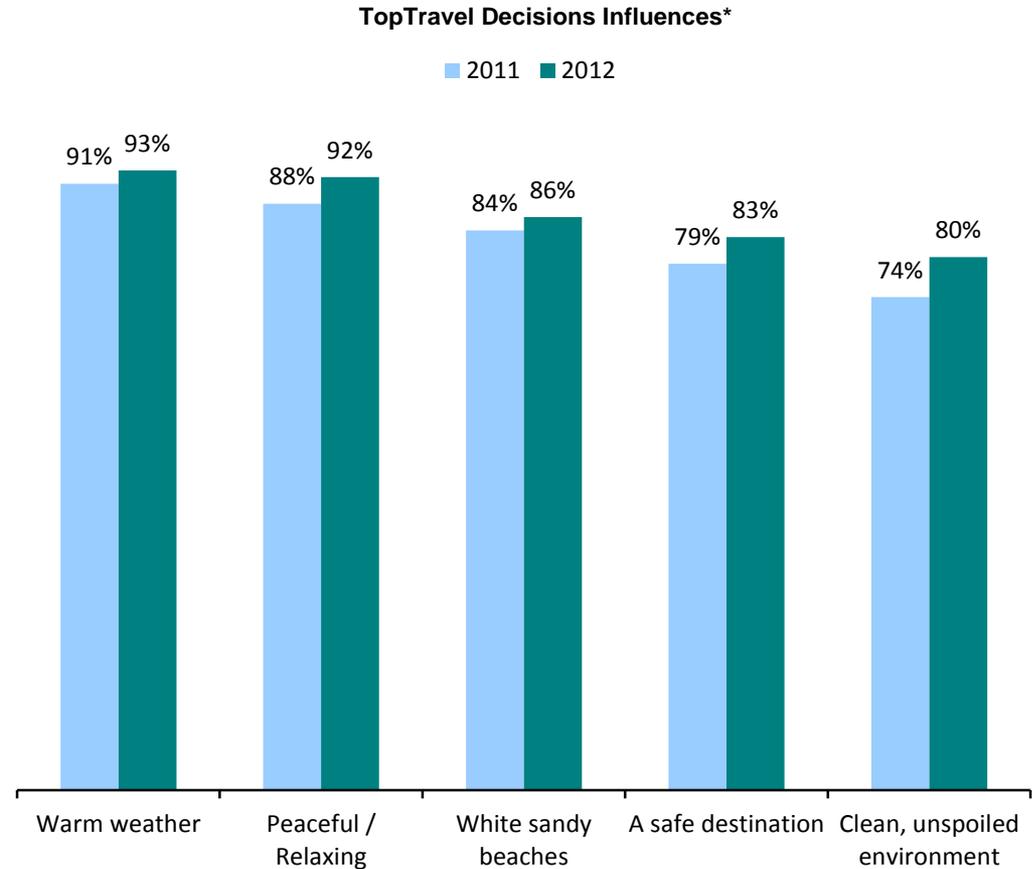


Travel Planning

Travel Decision Influences*		
	2011	2012
	A	B
Total Respondents	205	201
Warm weather	91%	93%
Peaceful / Relaxing	88%	92%
White sandy beaches	84%	86%
A safe destination	79%	83%
Clean, unspoiled environment	74%	80%
Good value for the money	72%	72%
Reasonably priced lodging	68%	69%
Convenient location	71%	68%
A "family" atmosphere	52%	66%A
Upscale accommodations	63%	65%
Plenty to see and do	57%	62%
Affordable dining	57%	60%

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

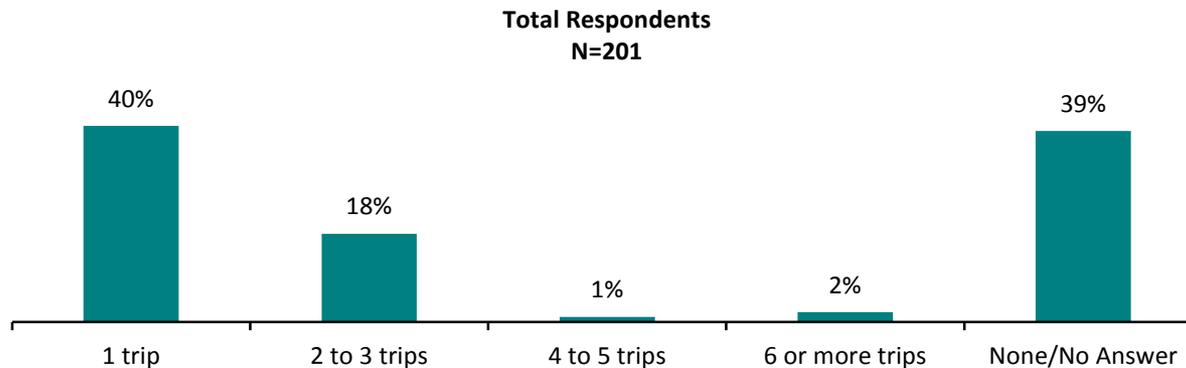
Mode of Transportation		
	2011	2012
	A	B
Total Respondents	205	201
Fly	74%	75%
Drive a personal vehicle	19%	21%
Drive a rental vehicle	5%	4%
Drive an RV	2%	-
Other/No Answer (NET)	1%	-

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

Airport Used		
	2011	2012
	A	B
Total Respondents	151	150
SW Florida Int'l (Fort Myers)	85%	85%
Orlando Int'l	3%	6%
Miami Int'l	5%	3%
Ft. Lauderdale Int'l	2%	2%
Tampa Int'l	3%	1%
Other/No Answer (NET)	1%	3%

Q2: At which Florida airport did you land?

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



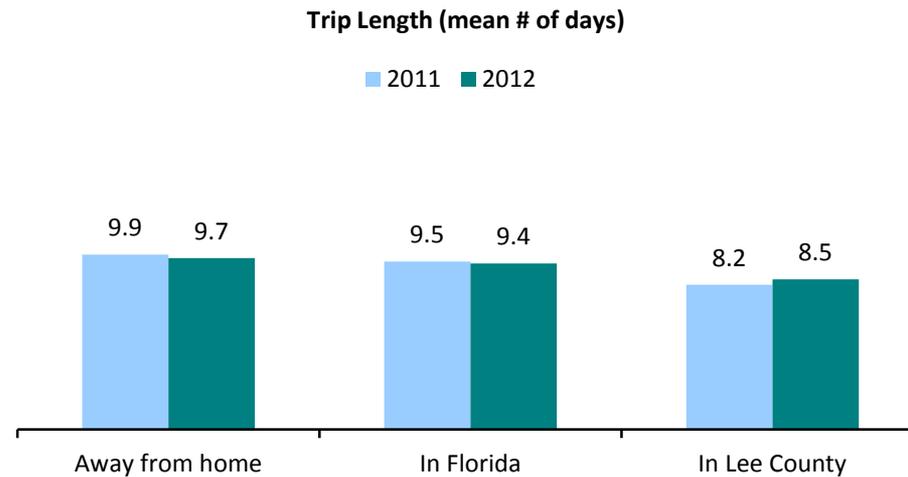
Q40. In the past year, how many trips have you taken where you used Southwest Florida International airport (Fort Myers) for your air travel?

Note: New question added in January 2012.

Trip Profile

Trip Length Mean # of Days			
	2011	2012	% Change
	A	B	
Total Respondents	205	201	
Away from home	9.9	9.7	-2.0%
In Florida	9.5	9.4	-1.1%
In Lee County	8.2	8.5	3.7%

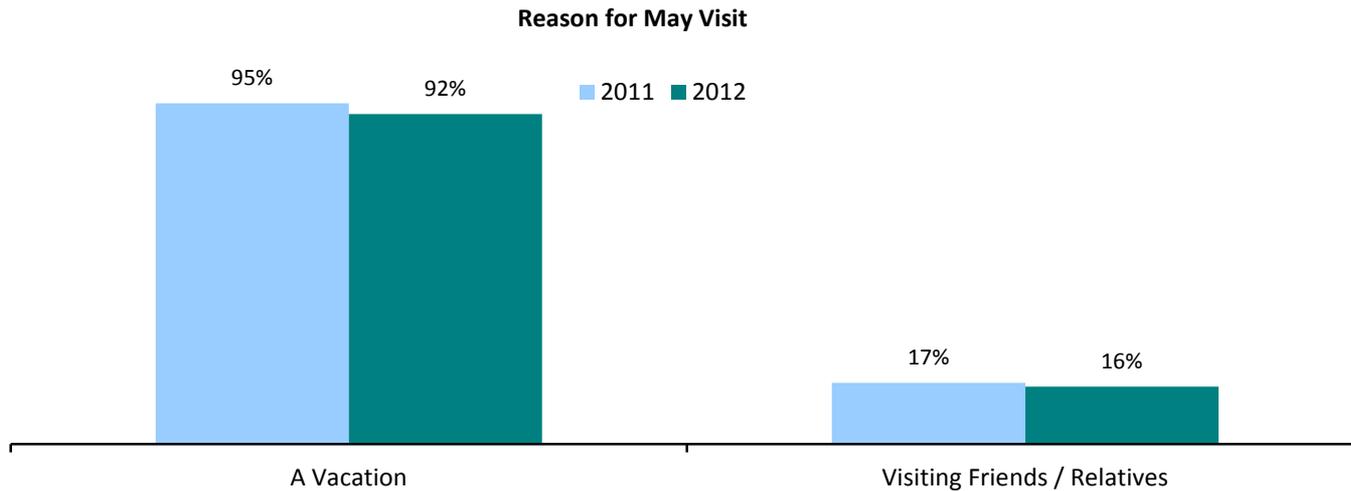
Q4a/b/c: On this trip, how many days will you be:



Trip Profile

Reason(s) for Visit		
	2011	2012
	A	B
Total Respondents	205	201
A Vacation	95%	92%
Visiting Friends / Relatives	17%	16%
Other Business Trip	1%	1%
Personal Business	1%	1%
Sporting Event(s)	<1%	-
Other/No Answer (NET)	4%	4%

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



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	205	201	15**	18**	143	148	35*	28**
First-time Visitor	24%	22%	N/A	N/A	18%	21%	47%	N/A
No	74%	77%	N/A	N/A	80%	79%	53%	N/A
No Answer	2%	1%	N/A	N/A	2%	-	-	N/A

Q15: Is this your first visit to Lee County?

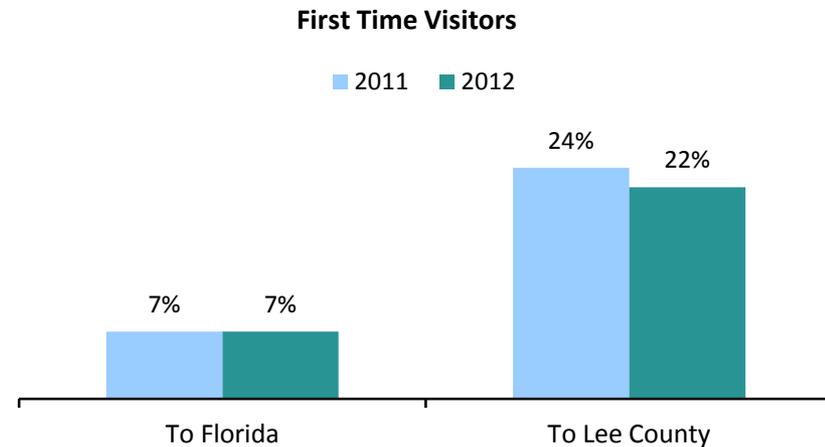
*Note: Small sample size. (N<70) Please interpret results with caution.

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

First Time Visitors to Florida		
	2011	2012
Total Respondents	205	201
	A	B
Yes, first-time visitor	7%	7%
No	84%	84%
No answer	1%	<1%
<i>FL Residents*</i>	8%	9%

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.



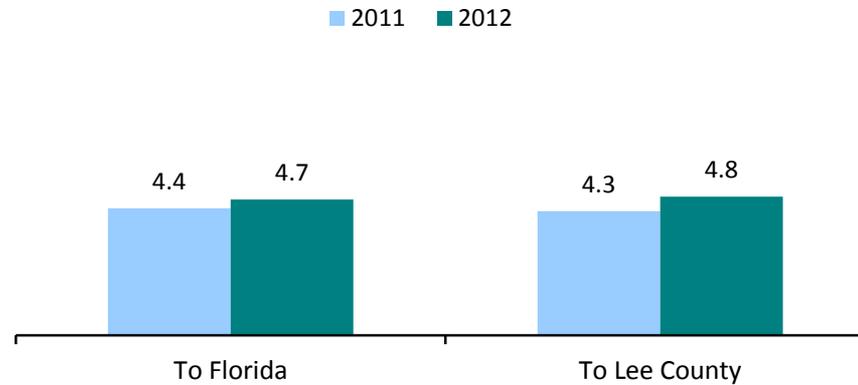
Trip Profile

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	172 (FL res. Excl.)	169 (FL res. Excl.)	152	155
Number of visits	4.4	4.7	4.3	4.8

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?

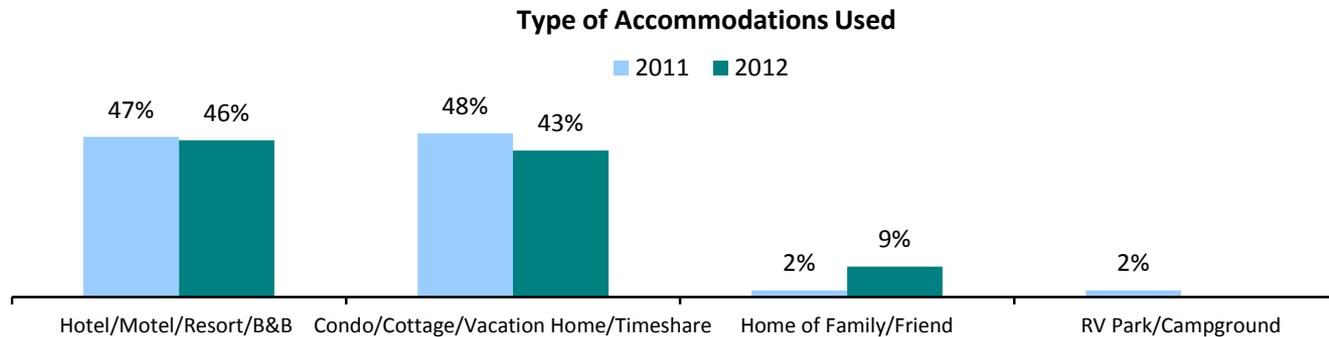
Previous Visits in Five Years



Trip Profile

Type of Accommodations Used		
	2011	2012
	A	B
Total Respondents	205	201
<u>Hotel/Motel/Resort/B&B (NET)</u>	<u>47%</u>	<u>46%</u>
Hotel/motel/historic inn	26%	25%
Resort	21%	21%
Bed and Breakfast	<1%	-
<u>Condo/Cottage/Vacation Home/Timeshare (NET)</u>	<u>48%</u>	<u>43%</u>
Rented home/condo	33%	26%
Owned home/condo	9%	12%
Borrowed home/condo	6%	5%
At the home of family or a friend	2%	9%A
RV Park/Campground (NET)	2%	-
Daytripper (No Accommodations)	1%	2%

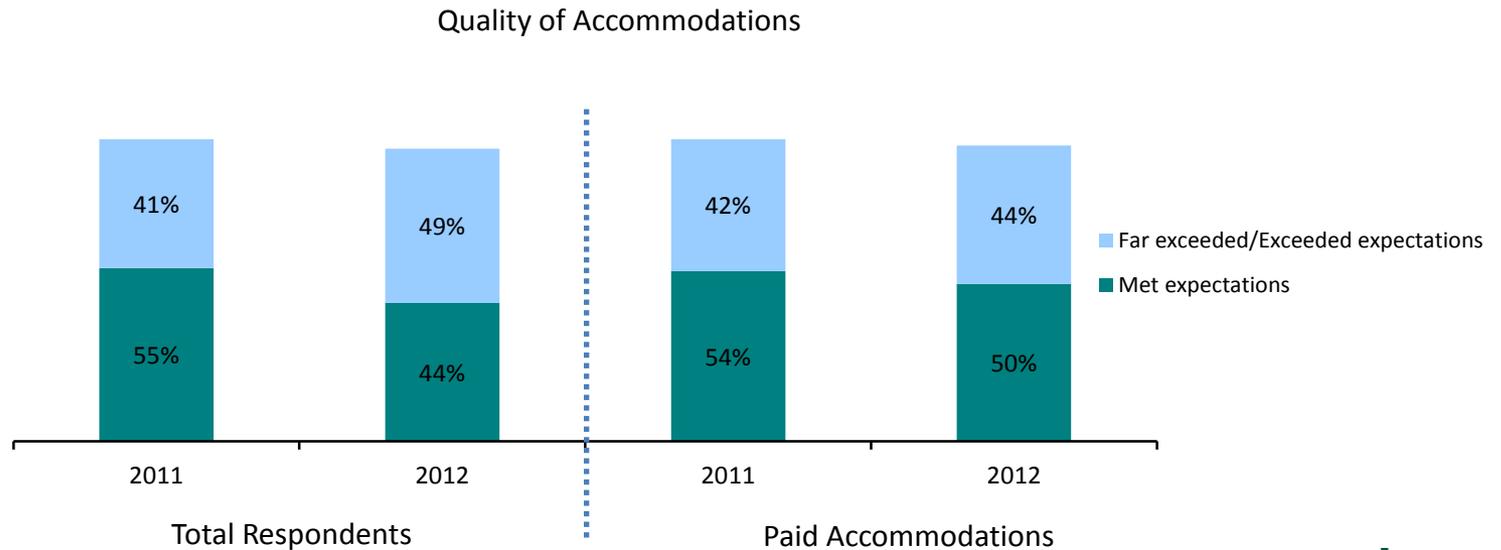
Q20: Are you staying overnight (either last night or tonight):



Trip Profile

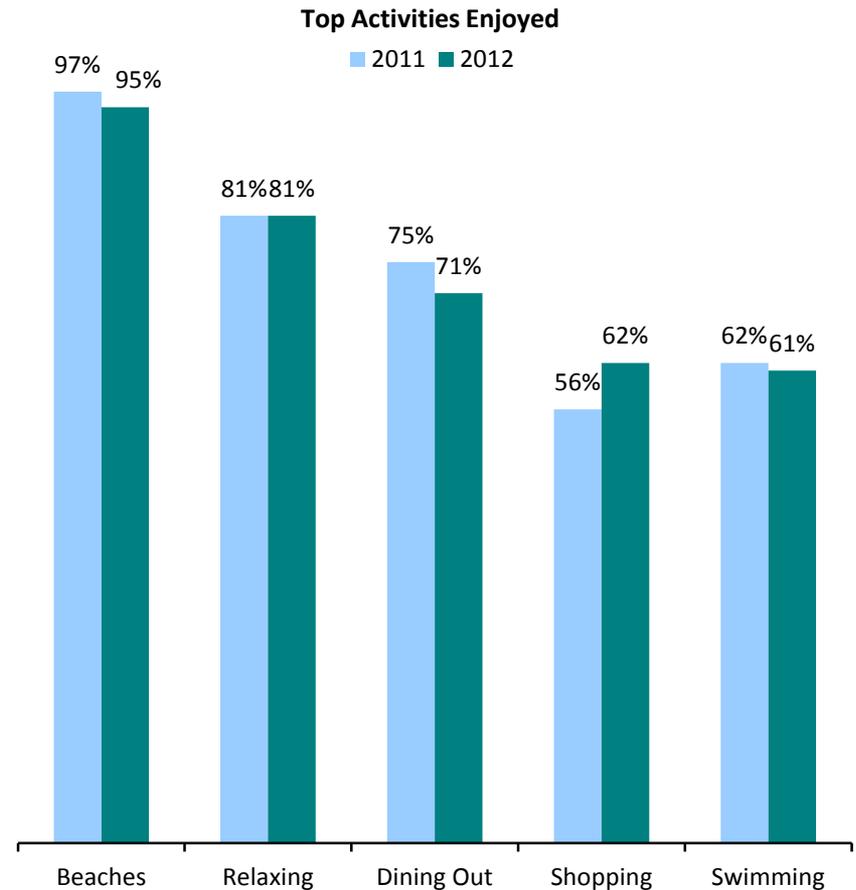
Quality of Accommodations				
	Total Respondents		Paid Accommodations	
	2011	2012	2011	2012
	A	B	A	B
Respondents	205	201	169	145
Far exceeded/Exceeded expectations	41%	49%	42%	44%
Met your expectations	55%B	44%	54%	50%
Did not meet/Far below expectations	2%	2%	3%	2%
No Answer	1%	4%A	1%	3%

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



Trip Activities

Activities Enjoyed		
	2011	2012
	A	B
Total Respondents	205	201
Beaches	97%	95%
Relaxing	81%	81%
Dining Out	75%	71%
Shopping	56%	62%
Swimming	62%	61%
Shelling	35%	44%
Sightseeing	30%	35%
Attractions	19%	25%
Watching Wildlife	26%	22%
Exercise / Working Out	22%	22%
Visiting Friends/Relatives	21%	21%
Photography	22%	21%
Bars / Nightlife	23%B	14%
Bicycle Riding	9%	14%
Boating	9%	13%
Birdwatching	12%	12%
Golfing	6%	9%
Fishing	10%	6%
Miniature Golf	8%	5%
Parasailing / Jet Skiing	10%B	5%
Miniature Golf	8%	5%
Cultural Events	1%	4%
Kayaking / Canoeing	6%	4%
Scuba Diving / Snorkeling	2%	2%
Tennis	1%	2%
Sporting Events	3%	2%
Other	2%	3%
No Answer	-	1%



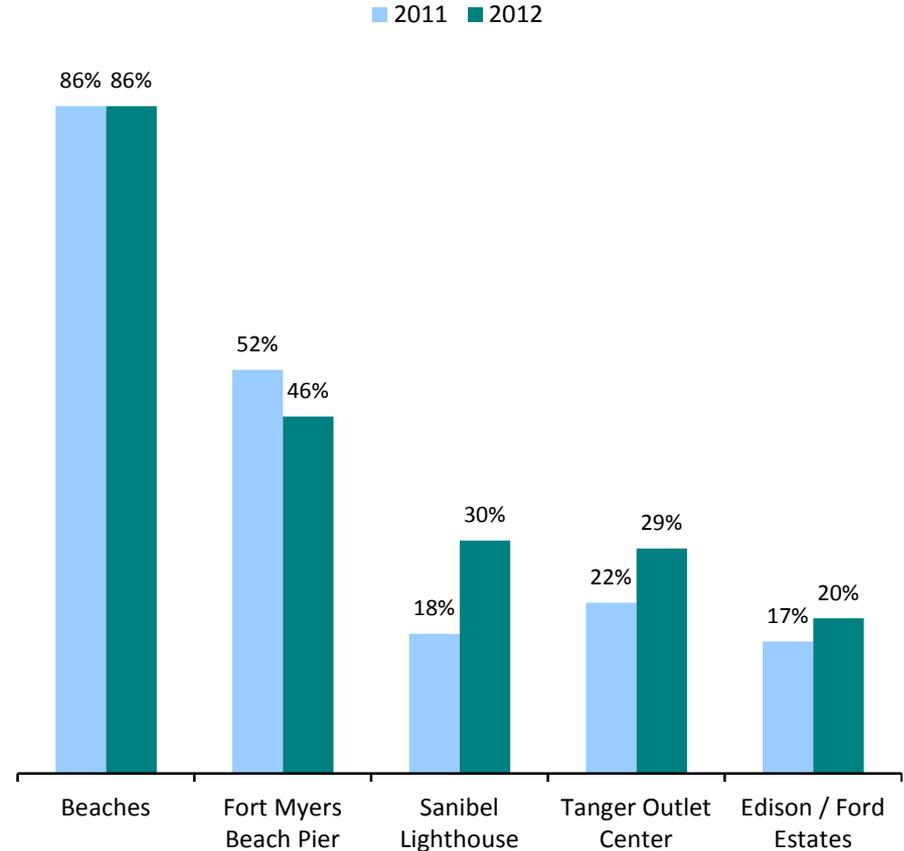
Q23: What activities or interests are you enjoying while in Lee County?
(Please mark ALL that apply.)

Trip Activities

Attractions Visited		
	2011	2012
	A	B
Total Respondents	205	201
Beaches	86%	86%
Fort Myers Beach Pier	52%	46%
Sanibel Lighthouse	18%	30%A
Tanger Outlet Center	22%	29%
Edison / Ford Estates	17%	20%
Periwinkle Place	13%	18%
Miromar Outlets Mall	18%	17%
Ding Darling National Wildlife Refuge	15%	16%
Bell Tower Shops	8%	13%
Coconut Point Mall	6%	11%
Edison Mall	7%	9%
Shell Factory and Nature Park	6%	6%
Gulf Coast Town Center	4%	6%
Bailey-Matthews Shell Museum	3%	3%
Manatee Park	1%	3%
Broadway Palm Dinner Theater	1%	2%
Babcock Wilderness Adventures	-	1%
Barbara B. Mann Performing Arts Hall	1%	1%
Other	2%	3%
None/No Answer	5%	5%

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

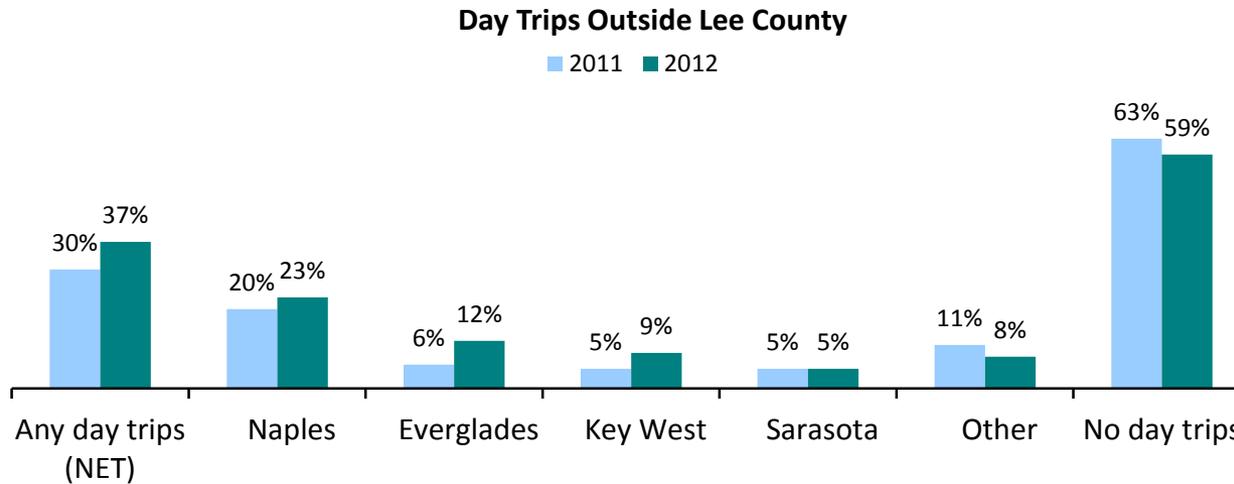
Top Attractions Visited



Trip Activities

Day Trips Outside Lee County		
	2011	2012
	A	B
Total Respondents	205	201
<u>Any day trips (NET)</u>	<u>30%</u>	<u>37%</u>
<i>Naples</i>	20%	23%
<i>Everglades</i>	6%	12%
<i>Key West</i>	5%	9%
<i>Sarasota</i>	5%	5%
<i>Other</i>	11%	8%
<u>No day trips</u>	<u>63%</u>	<u>59%</u>
No Answer	12%	9%

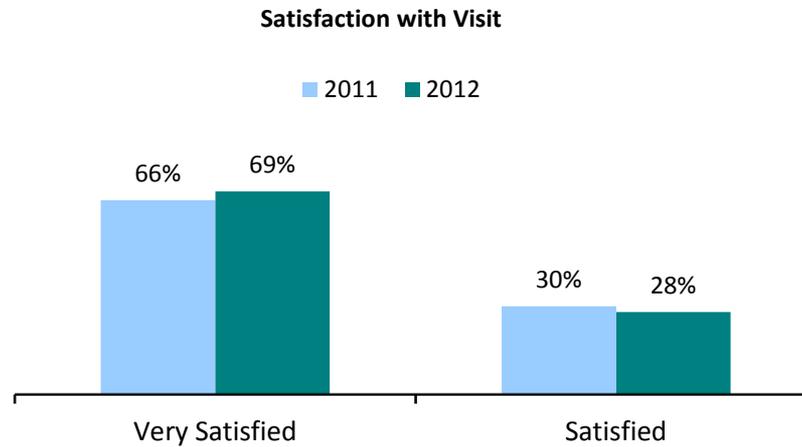
Q25: Where did you go on day trips outside Lee County?



Lee County Experience

Satisfaction with Visit		
	2011	2012
	A	B
Total Respondents	205	201
<u>Satisfied</u>	<u>96%</u>	<u>97%</u>
<i>Very Satisfied</i>	66%	69%
<i>Satisfied</i>	30%	28%
Neither	1%	1%
Dissatisfied/Very Dissatisfied	1%	<1%
Don't know/no answer	2%	2%

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



Future Plans

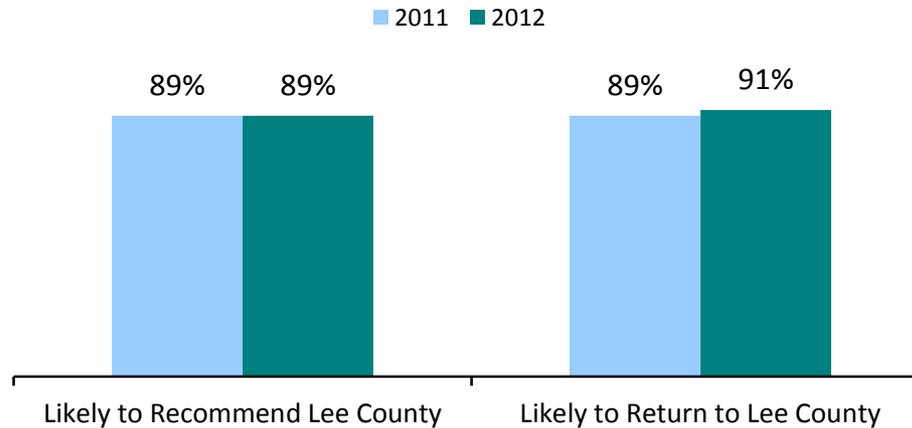
Likelihood to Recommend/Return to Lee County		
	2011	2012
	A	B
Total Respondents	205	201
Likely to Recommend Lee County	89%	89%
Likely to Return to Lee County	89%	91%
Base: Total Respondents Planning to Return	183	182
Likely to Return Next Year	56%	67%A

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	205	201
Insects	39%B	18%
Traffic	28%B	13%
Beach seaweed	6%	10%
High prices	9%	9%
Quality of accommodations	3%	3%
Lack of nightlife	6%	3%
Red Tide	1%	2%
Weather	-	2%
Other	5%	5%
Nothing/No Answer (NET)	26%	48%A

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

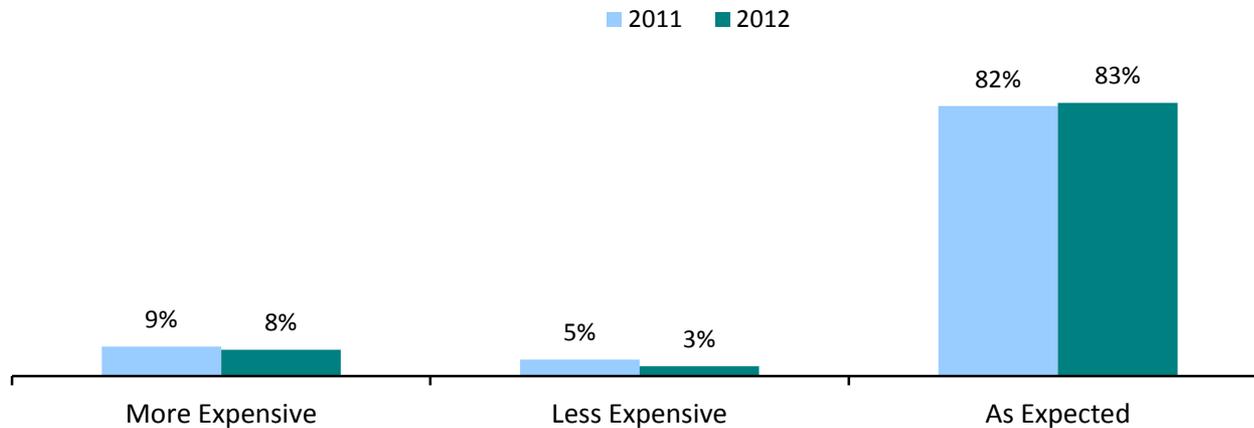


Trip Activities

Perception of Lee County as Expensive		
	2011	2012
	A	B
Total Respondents	205	201
More Expensive	9%	8%
Less Expensive	5%	3%
As Expected	82%	83%
Don't know/No Answer (NET)	4%	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	205	201
Age of respondent (mean)	50.4	51.2
Annual household income (mean)	\$102,923	\$105,350
Martial Status		
Married	76%	72%
Single	12%	14%
Vacations per year (mean)	2.4	2.4
Short getaways per year (mean)	3.8	3.4

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	205	201
Family	30%	38%
Couple	49%B	38%
Group of couples/friends	14%	14%
Single	2%	7%A
Mean travel party size	3.3	3.0
Mean adults in travel party	2.8	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	205	201
<u>Traveling with any Children (net)</u>	<u>22%</u>	<u>21%</u>
Any younger than 6	11%	12%
Any ages 6-11	9%	7%
Any 12-17 years old	11%	6%
No Children	78%	79%

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 May Visitation					
	%		Visitor Estimates		
	2011	2012	2011	2012	% Change
Paid Accommodations	51%	47%	229,124	188,747	-17.6%
Friends/Relatives	49%	53%	<u>216,705</u>	<u>209,155</u>	-3.5%
Total Visitation			445,829	397,902	-10.8%

Paid Accommodations Visitors					
	%		Visitor Estimates		
Country of Origin	2011	2012	2011	2012	% Change
United States	83%	85%	191,163	160,110	-16.2%
Germany	4%	6%	9,490	10,414	9.7%
UK	1%	3%	1,356	5,207	284.1%
Ireland	-	2%	-	3,905	-
France	-	2%	-	3,905	-
BeNeLux	1%	1%	2,712	1,302	-52.0%
Switzerland	1%	1%	2,712	1,302	-52.0%
Canada	<7%>	1%	16,269	1,302	-92.0%
Austria	1%	-	1,356	-	-
Scandinavia	1%	-	1,356	-	-
Other International	1%	1%	2,712	1,302	-52.0%
U.S. Region of Origin	2011	2012	2011	2012	% Change
Florida	9%	11%	16,269	18,224	12.0%
South (including Florida)	16%	22%	31,183	35,146	12.7%
Midwest	51%	47%	97,615	75,499	-22.7%
Northeast	23%	25%	43,384	40,353	-7.0%
West	2%	2%	4,067	3,905	-4.0%
No Answer	8%	3%	14,913	5,207	-65.1%

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

2012 Top DMAs (Paid Accommodations)		
Chicago	8%	13,017
New York	7%	10,414
Indianapolis	5%	7,810
Providence-New Bedford	5%	7,810
Pittsburgh	4%	6,509
Tampa-Saint Petersburg	4%	6,509
Cincinnati	3%	5,207
Cleveland-Akron	3%	5,207
Detroit	3%	5,207
Minneapolis-Saint Paul	3%	5,207
Orlando-Daytona Beach-Melbourne	3%	5,207

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

Occupancy Data Analysis May 2012

Property managers representing 100 properties in Lee County were interviewed for the May 2012 Occupancy Survey between June 1 and June 15, 2012, a sample considered accurate to plus or minus 9.8 percentage points at the 95% confidence level.

Property managers representing 126 properties in Lee County were interviewed for the May 2011 Occupancy Survey between June 1 and June 15, 2011, a sample considered accurate to plus or minus 8.7 percentage points at the 95% confidence level.

May Occupancy/Daily Rates

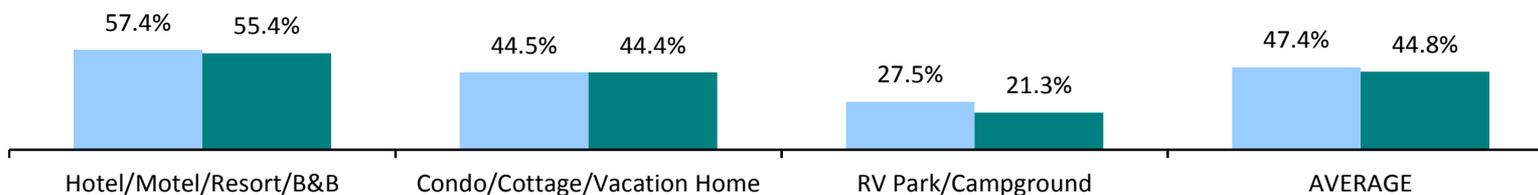
	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
Property Managers Responding	122	96		121	94		122/121	96/94	
Hotel/Motel/Resort/B&B	57.4%	55.4%	-3.5%	\$124.92	\$119.88	-4.0%	\$71.68	\$66.40	-7.4%
Condo/Cottage/Vacation Home	44.5%	44.4%	-0.3%	\$147.17	\$144.24	-2.0%	\$65.52	\$64.01	-2.3%
RV Park/Campground	27.5%	21.3%	-22.8%	\$37.74	\$41.05	8.8%	\$10.39	\$8.73	-16.0%
AVERAGE	47.4%	44.8%	-5.5%	\$117.58	\$116.60	-0.8%	\$55.74	\$52.22	-6.3%

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

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

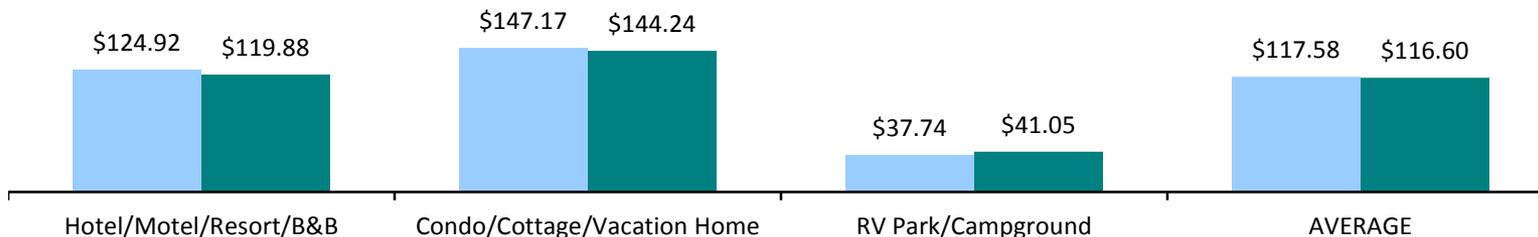
Average Occupancy Rate

■ 2011 ■ 2012



Average Daily Rate

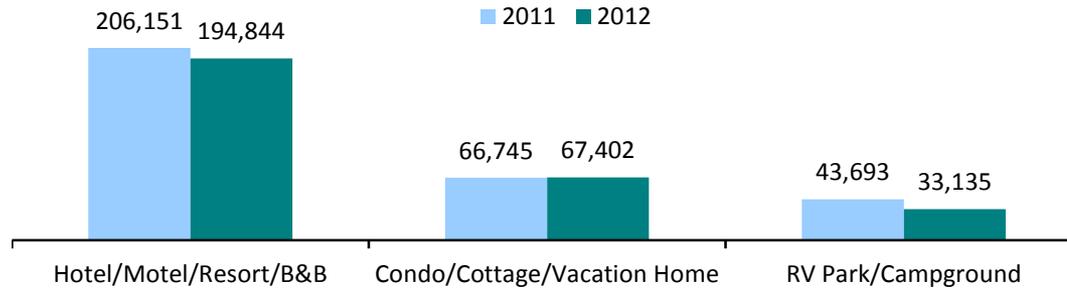
■ 2011 ■ 2012



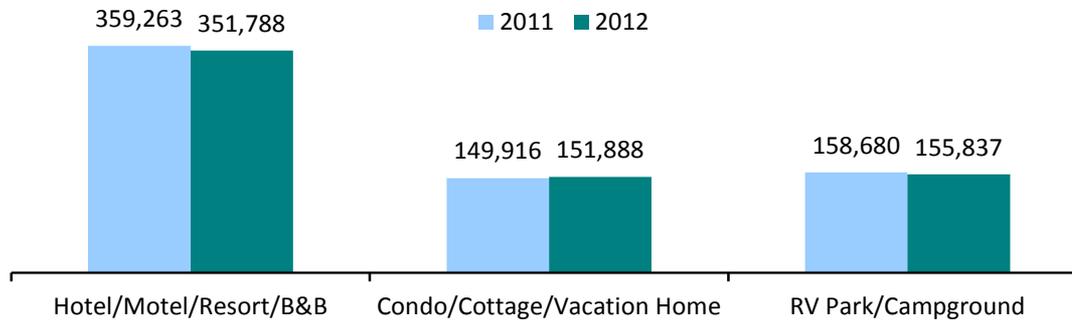
May Room/Unit/Site Nights

	Occupied Room Nights			Available Room Nights		
	2011	2012	% Change	2011	2012	% Change
Hotel/Motel/Resort/B&B	206,151	194,844	-5.5%	359,263	351,788	-2.1%
Condo/Cottage/Vacation Home	66,745	67,402	1.0%	149,916	151,888	1.3%
RV Park/Campground	43,693	33,135	-24.2%	158,680	155,837	-1.8%
Total	316,589	295,381	-6.7%	667,859	659,513	-1.2%

Occupied Room Nights



Available Room Nights



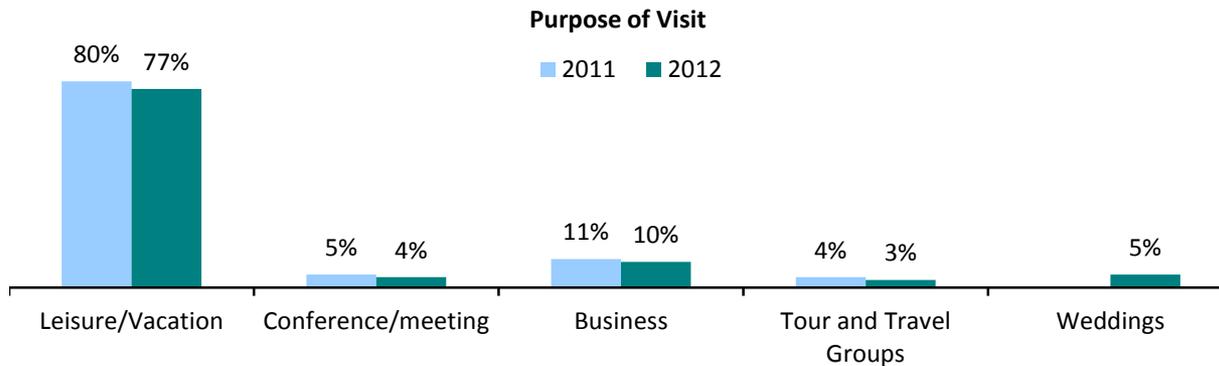
Lodging Management Estimates

Guest Profile		
	2011	2012
	A	B
Property Managers Responding	110	88
<u>Purpose of Visit</u>		
Leisure/Vacation	80%	77%
Conference/meeting	5%	4%
Business	11%	10%
Tour and Travel Groups	4%	3%
Weddings/Social groups/Reunions (net)	--	5%
Property Managers Responding	116	91
Average guests per room	2.6	2.5
Property Managers Responding	118	90
Average length of stay in nights	5.5	5.2

Q23. What percent of your May room/site/unit occupancy do you estimate was generated by:

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

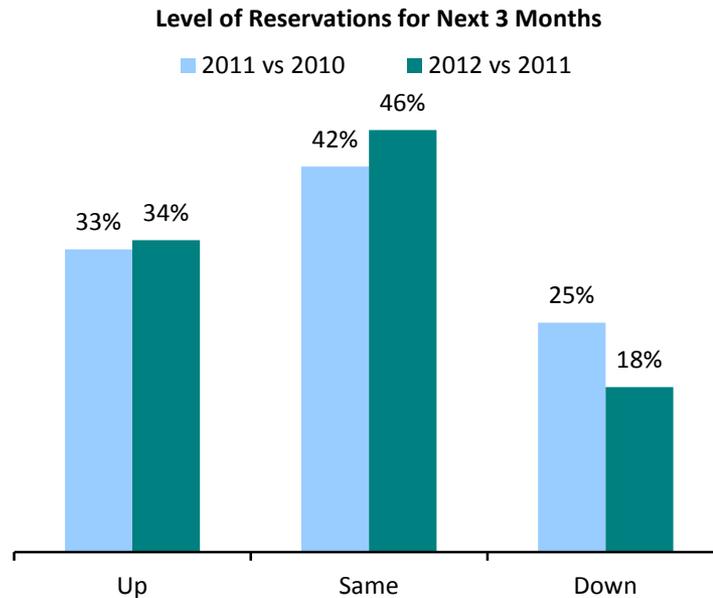
Q19: What was the average length of stay (in nights) of your guests in May?



Occupancy Barometer

Level of Reservations for Next 3 Months Compared to Last Year		
	2011	2012
	A	B
Total Respondents	120	92
<u>Up/Same (net)</u>	<u>74%</u>	<u>79%</u>
Up	33%	34%
Same	42%	46%
Down	25%	18%

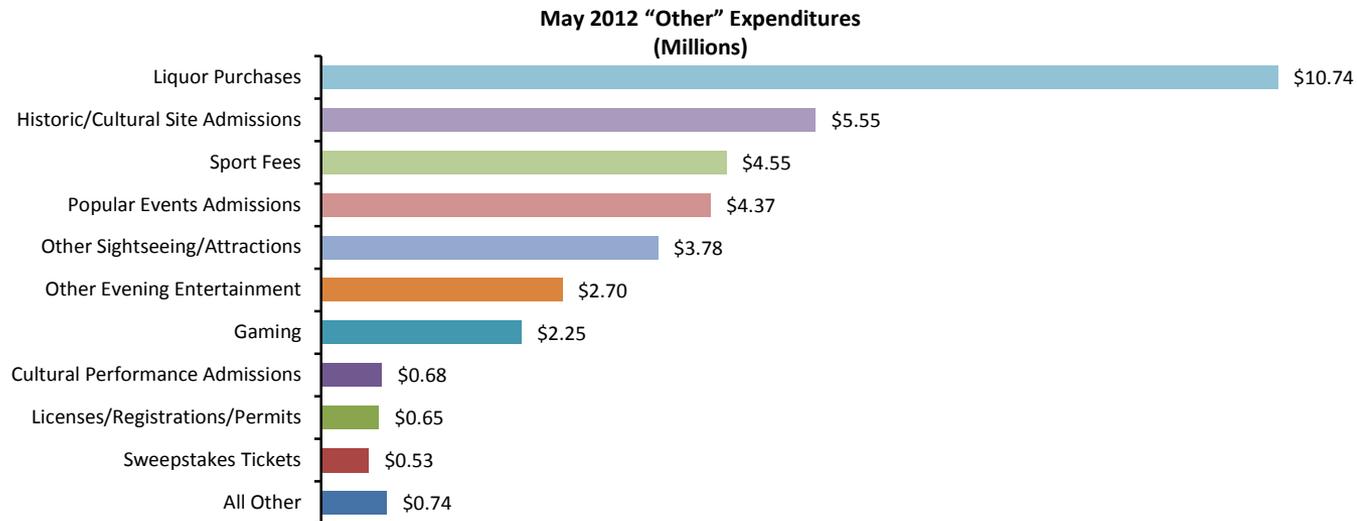
Q26: Compared to June, July and August of one year ago, is your property's total level of reservations up, the same or down for the upcoming June, July and August?



Economic Impact Analysis
May 2012

Total Visitor Expenditures by Spending Category

TOTAL EXPENDITURES			
	2011	2012	% Change
TOTAL	\$204,598,784	\$182,410,977	-10.8%
Food and Beverages	\$59,786,469	\$51,320,326	-14.2%
Shopping	\$46,112,657	\$45,943,985	-0.4%
Lodging Accommodations	\$37,224,666	\$34,440,685	-7.5%
Ground Transportation	\$18,072,981	\$14,831,051	-17.9%
Other	\$43,402,011	\$35,874,930	-17.3%



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>\$109,425,460</u>	<u>\$97,468,809</u>	<u>-10.9%</u>	<u>\$95,173,324</u>	<u>\$84,942,168</u>	<u>-10.8%</u>
Lodging Accommodations	\$37,224,666	\$34,440,685	-7.5%	\$0	\$0	--
Food and Beverages	\$25,304,647	\$21,561,042	-14.8%	\$34,481,822	\$29,759,284	-13.7%
Shopping	\$20,583,489	\$19,001,171	-7.7%	\$25,529,168	\$26,942,814	5.5%
Ground Transportation	\$8,446,125	\$7,932,914	-6.1%	\$9,626,856	\$6,898,137	-28.3%
Other	\$17,866,533	\$14,532,997	-18.7%	\$25,535,478	\$21,341,933	-16.4%

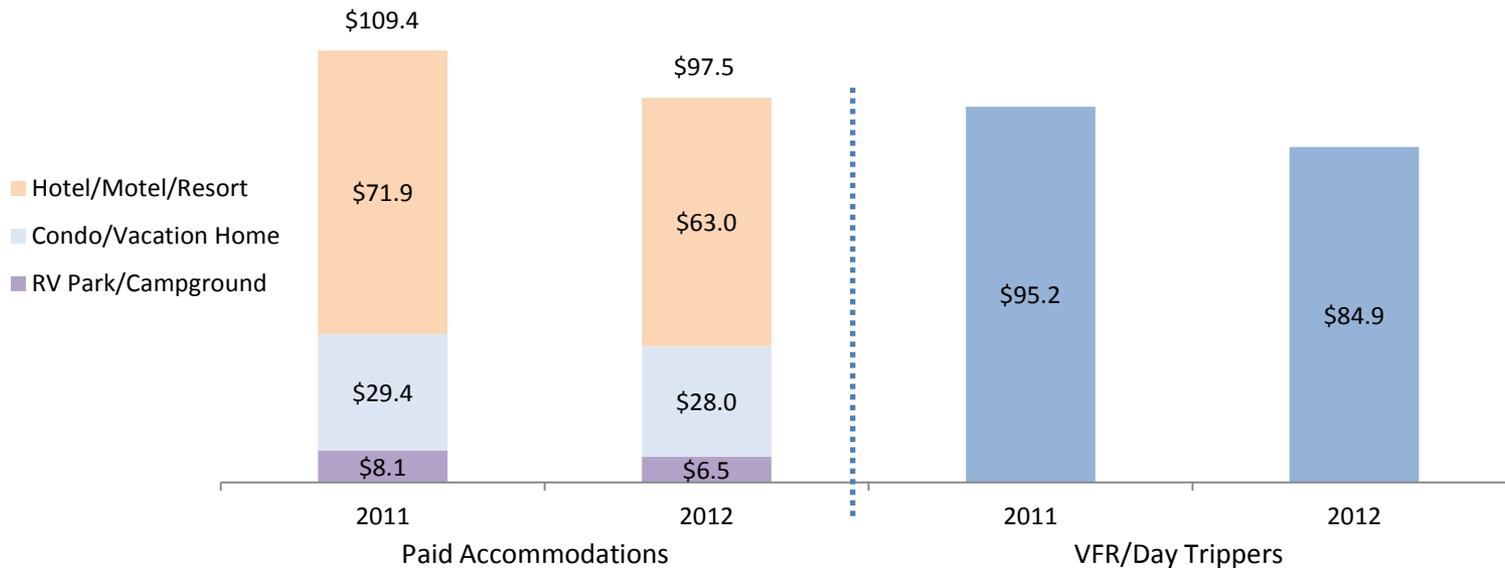
“Other ” includes the following categories:

- 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>\$204,598,784</u>	<u>\$182,410,977</u>	<u>-10.8%</u>	<u>100%</u>	<u>100%</u>
Visiting Friends & Relatives/Day Trippers	\$95,173,324	\$84,942,168	-10.8%	47%	47%
Paid Accommodations	<u>\$109,425,460</u>	<u>\$97,468,809</u>	<u>-10.9%</u>	<u>53%</u>	<u>53%</u>
<i>Hotel/Motel/Resort/B&B</i>	\$71,875,371	\$62,978,169	-12.4%	35%	35%
<i>Condo/Cottage/Vacation Home</i>	\$29,415,784	\$27,969,869	-4.9%	14%	15%
<i>RV Park/Campground</i>	\$8,134,305	\$6,520,771	-19.8%	4%	4%

Expenditures by Lodging Type
(Millions)



Appendix
May 2012

May 2012 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Ft. Myers	RSW Airport	5/5/2012	25
Fort Myers Beach	Diamond Head Resort	5/8/2012	9
Fort Myers Beach	Estero Beach Club	5/8/2012	9
Fort Myers Beach	Neptune Inn	5/8/2012	5
Ft. Myers	Edison Estates	5/11/2012	26
Sanibel	Holiday Inn	5/14/2012	9
Sanibel	Loggerhead Cay	5/14/2012	9
Sanibel	Tortuga Beach Club	5/14/2012	9
Bonita Springs	Bonita Beach	5/19/2012	25
Cape Coral	Cape Coral Yacht Club	5/19/2012	4
Fort Myers Beach	Best Western	5/22/2012	7
Fort Myers Beach	Pink Shell Resort	5/22/2012	9
Fort Myers Beach	Times Square	5/22/2012	12
Sanibel	Lighthouse Beach	5/24/2012	12
Sanibel	Sundial Resort	5/24/2012	11
Ft. Myers	Centennial Park	5/26/2012	7
Ft. Myers	Clarion	5/26/2012	6
North Ft. Myers	Shell Factory	5/26/2012	7
TOTAL			201

Occupancy Interviewing Statistics

Interviews were conducted from June 1 – June 15, 2012. Information was provided by 100 Lee County lodging properties.

Lodging Type	Number of Interviews
Hotel/Motel/Resort/B&Bs	68
Condo/Cottage/Vacation Home/Timeshare	21
RV Park/Campground	11
Total	100