



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

**August 2012 Visitor Profile and Occupancy Analysis  
October 18, 2012**

**Prepared for:**

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

**Prepared by:**

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## Executive Summary

### August 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 August 2012, Lee County hosted 182,500 visitors staying in paid accommodations and 171,100 staying with friends or relatives while visiting, for a total of about 353,600 visitors.
- August 2012 visitation among paid accommodations guests was up 11.5% from 2011. Similarly, visitation among those staying with friends or relatives was up 21.8% year-over-year. As a result, the total number of visitors during August 2012 was 16.3% higher than the prior year.

Estimated Visitation	2011	2012	% Change
Paid Accommodations	163,673	182,484	11.5%
Friends/Relatives	140,501	171,139	21.8%
<b>Total Visitation</b>	<b>304,174</b>	<b>353,623</b>	<b>16.3%</b>

### Visitor Expenditures

- August 2012 visitors spent an estimated \$149.8 million during their stay, which was somewhat below spending levels estimated for August 2011 (-4.8%).
- Paid accommodations guests contributed \$91 million – a 61% share of the total. Those visiting friends and relatives added another \$59 million. Spending among both visitor segments was down when compared with the prior year.

Estimated Expenditures	2011	2012	% Change
Paid Accommodations	\$94,558,552	\$90,976,682	-3.8%
Friends/Relatives	\$62,803,790	\$58,789,186	-6.4%
<b>Total Expenditures</b>	<b>\$157,362,342</b>	<b>\$149,765,868</b>	<b>-4.8%</b>

Visitor Origin

- Nearly three-quarters of August 2012 visitors staying in paid accommodations were U.S. residents (73%) – about the same incidence as last year (76%). Germany and the UK delivered the largest numbers of international visitors staying in paid accommodations, followed by Canada and France.
- Four in ten domestic paid accommodations guests came from the South (39%) and nearly as many from the Midwest (36%). Guests from the Northeast and West represented the minority.
- Miami was the top domestic feeder market for the Lee County lodging industry in August 2012, with New York and Detroit ranking as a distant second and third. Tampa and West Palm Beach followed as other key in-state markets contributing lodging guests.

**2012 Top DMAs (Paid Accommodations)**

Miami-Fort Lauderdale	13%	16,589
New York	8%	10,209
Detroit	6%	7,657
Tampa-Saint Petersburg	5%	6,381
West Palm Beach	5%	6,381
Indianapolis	5%	6,381
Pittsburgh	5%	6,381
Saint Louis	5%	6,381

**Visitors Staying in Paid Accommodations**

Country of Origin	%		Visitor Estimates		% Change
	2011	2012	2011	2012	
United States	76%	73%	124,470	132,716	6.6%
Germany	7%	6%	11,761	11,485	-2.3%
UK	5%	5%	7,841	8,933	13.9%
Canada	4%	3%	6,861	6,381	-7.0%
France	3%	3%	4,900	6,381	30.2%
Scandinavia	1%	2%	980	3,828	290.6%
BeNeLux	1%	1%	1,960	2,552	30.2%
Ireland	1%	1%	1,960	1,276	-34.9%
Latin America	1%	1%	980	1,276	30.2%
Switzerland	0%	1%	-	1,276	-
Austria	1%	0%	980	-	-
Other International	0%	4%	-	6,381	-
No Answer	1%	0%	980	-	-

**Visitors Staying in Paid Accommodations**

U.S. Region of Origin	%		Visitor Estimates		% Change
	2011	2012	2011	2012	
Florida	28%	26%	35,283	34,455	-2.3%
South (including Florida)	43%	39%	52,924	52,321	-1.1%
Midwest	28%	36%	35,283	47,216	33.8%
Northeast	17%	21%	21,562	28,074	30.2%
West	2%	1%	2,940	1,276	-56.6%
No Answer	9%	4%	11,761	5,104	-67.4%

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

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

## Trip Planning

- The trip planning window reported by August 2012 visitors was similar in length to that of August 2011 visitors. At least half said they started talking about and chose Lee County for their trip destination three or more months in advance but fewer made their lodging reservations that far out.
  - 62% started talking about trip in that timeframe (vs. 69% August 2011)
  - 55% chose Lee County for trip (vs. 61% August 2011)
  - 35% made lodging reservation (vs. 44% August 2011)
- Use of the internet while planning their Lee County trip continued to be prevalent among August 2012 visitors, with many claiming to have visited one or more websites (83%). Visitors most often mentioned using airline websites and search engine websites (34% and 32% respectively). While computers were still the most frequently mentioned way visitors said they typically access online destination planning information, nearly half of visitors indicated they use a smartphone (48%).
- When talking about coming to Lee County, the attributes that received the highest ratings among August 2012 visitors with regard to influencing their selection were:
  - *Peaceful/relaxing* (88%),
  - *White sandy beaches* (82%),
  - *Warm weather* (79%), and
  - *Clean, unspoiled environment* (77%).

## Visitor Profile

- Well over half of August 2012 visitors arrived by plane when traveling to the area (61%). Most of those who flew came through Southwest Florida International Airport (72%). These patterns were the same as those observed among August 2011 visitors.
- Four in ten visitors interviewed indicated they were staying in hotel/motel/resorts (42%) during their trip, and the same number said they were staying in a condo/vacation home property (43%). Not quite half of those staying in paid accommodations reported that the quality *far exceeded or exceeded expectations* (45%).
- The top activities visitors enjoyed in Lee County during August 2012 were beaches (97%), relaxing (85%), swimming (79%), dining out (72%), and shopping (57%).

### Visitor Profile (cont'd)

- Overall, visitor satisfaction remains extremely high – nine in ten August 2012 visitors reported being *very satisfied* (63%) or *satisfied* (31%) with their visit. About the same proportion indicated they are likely to return to Lee County (88%), half of whom claimed they will return next year (54%). The majority also said they will recommend Lee County to a friend over other areas in Florida (90%).
- When asked what they disliked about the Lee County area, about one third of August 2012 visitors reported *insects* (30%) as a concern – by far the highest mention but not unlike reports from August 2011 visitors (32%).
- The demographic composition of August 2012 visitors can be summarized as follows:
  - 47 years of age on average
  - \$104,900 household income on average
  - 74% married
  - 63% traveling as a family
  - 25% traveling as a couple
  - 51% traveling *with* children
  - 3 to 4 people in travel party on average

### Lodging Industry Assessments

- For the Lee County lodging industry in total, *available* room nights declined 2.1% from August 2011 to 2012 and *occupied* room nights fell 4.4%. For all property categories, the rate of decline in *occupied* room nights was greater than that of *available* room nights, but the disparity was less pronounced for the hotel/motel/resort category.

	Occupied Room Nights			Available Room Nights		
	2011	2012	% Change	2011	2012	% Change
Hotel/Motel/Resort/B&B	170,107	166,111	-2.3%	346,518	340,637	-1.7%
Condo/Cottage/Vacation Home	63,435	58,393	-7.9%	148,490	147,010	-1.0%
RV Park/Campground	43,287	40,039	-7.5%	156,364	149,885	-4.1%
<b>Total</b>	<b>276,829</b>	<b>264,543</b>	<b>-4.4%</b>	<b>651,372</b>	<b>637,532</b>	<b>-2.1%</b>

- As a result, the industry-wide average occupancy rate in Lee County dropped from 42.5% in August 2011 to 41.5% in August 2012 (-2.4%). Average occupancy rate for the hotel/motel/resort category was relatively stable (-0.6%). However, condos/vacation homes and RV parks/campgrounds saw average occupancy rate decline more substantially (-7.0% and -3.6% respectively). The precautionary evacuations due to Tropical Storm Isaac likely had a negative impact on average occupancy rate for coastal properties.
- In contrast, Lee County's average daily rate held steady year-over-year (+0.8%). ADR was relatively unchanged versus last August for hotels/motels/resorts and condos/vacation homes, while RV parks/campgrounds saw growth in ADR (+3.8%).
- Flat ADR coupled with a decline in average occupancy rate generated a 1.6% decline in RevPAR for August year-over-year. Although hotels/motels/resorts and RV parks/campgrounds did not experience any falloff in RevPAR, condos/vacation homes did (-7.3%).

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
<b>Property Managers Responding</b>	<b>98</b>	<b>107</b>		<b>98</b>	<b>108</b>		<b>98/98</b>	<b>107/108</b>	
Hotel/Motel/Resort/B&B	49.1%	48.8%	-0.6%	\$110.35	\$111.20	0.8%	\$54.17	\$54.23	0.1%
Condo/Cottage/Vacation Home	42.7%	39.7%	-7.0%	\$136.04	\$135.68	-0.3%	\$58.12	\$53.89	-7.3%
RV Park/Campground	27.7%	26.7%	-3.6%	\$39.55	\$41.07	3.8%	\$10.95	\$10.97	0.2%
<b>AVERAGE</b>	<b>42.5%</b>	<b>41.5%</b>	<b>-2.4%</b>	<b>\$105.17</b>	<b>\$105.99</b>	<b>0.8%</b>	<b>\$44.70</b>	<b>\$43.98</b>	<b>-1.6%</b>

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. About one-third of managers responding reported that their total level of reservations for the next three months (September, October, and November) are up over the same period the prior year (34%) – similar to reports in 2011 (40%). Another four in ten said reservations for the next three months of 2012 are at least the same as the same time last year (42% vs. 35% August 2011), and about one-quarter claimed that their reservations are down for the next three months (24% vs. 23% August 2011).

## August 2012 Lee County Snapshot

Total Visitation				
	%		Visitor Estimates	
	2011	2012	2011	2012
Paid Accommodations	54%	52%	163,673	182,484
Friends/Relatives	46%	48%	140,501	171,139
<i>Total Visitation</i>			304,174	353,623

Total Visitor Expenditures			
	2011	2012	% Change
Total Visitor Expenditures	\$157,362,342	\$149,765,868	-4.8%
Paid Accommodations	\$94,558,552	\$90,976,682	-3.8%

Visitor Origin - Visitors Staying in Paid Accommodations				
	%		Visitor Estimates	
	2011	2012	2011	2012
Florida	28%	26%	35,283	34,455
United States	76%	73%	124,470	132,716
Germany	7%	6%	11,761	11,485
UK	5%	5%	7,841	8,933
Canada	4%	3%	6,861	6,381
Other International	7%	13%	11,761	22,970
No Answer	1%	-	980	-

Average Per Person Per Day Expenditures		
2011	2012	% Change
\$105.15	\$108.70	+3.4%

First-Time/Repeat Visitors to Lee County		
	2011	2012
First-time	34%	26%
Repeat	64%	73%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
<b>Property Managers Responding</b>	<b>98</b>	<b>107</b>		<b>98</b>	<b>108</b>		<b>98/98</b>	<b>107/108</b>	
Hotel/Motel/Resort/B&B	49.1%	48.8%	-0.6%	\$110.35	\$111.20	0.8%	\$54.17	\$54.23	0.1%
Condo/Cottage/Vacation Home	42.7%	39.7%	-7.0%	\$136.04	\$135.68	-0.3%	\$58.12	\$53.89	-7.3%
RV Park/Campground	27.7%	26.7%	-3.6%	\$39.55	\$41.07	3.8%	\$10.95	\$10.97	0.2%
<b>AVERAGE</b>	<b>42.5%</b>	<b>41.5%</b>	<b>-2.4%</b>	<b>\$105.17</b>	<b>\$105.99</b>	<b>0.8%</b>	<b>\$44.70</b>	<b>\$43.98</b>	<b>-1.6%</b>

## Calendar YTD 2012 Lee County Snapshot

Total Calendar Year Visitation				
	%		Visitor Estimates	
	2011	2012	2011	2012
Paid Accommodations	53%	50%	1,780,529	1,723,397
Friends/Relatives	47%	50%	<u>1,586,005</u>	<u>1,738,419</u>
<i>Total Visitation</i>			3,366,534	3,461,816

Visitor Origin - Visitors Staying in Paid Accommodations				
	%		Visitor Estimates	
	2011	2012	2011	2012
Florida	13%	10%	187,017	140,776
United States	83%	81%	1,477,592	1,392,943
Germany	3%	5%	44,822	91,875
Canada	6%	4%	106,646	62,238
UK	3%	3%	47,914	51,865
Other International	5%	7%	85,008	121,512
No Answer	1%	<1%	18,547	2,964

Total Visitor Expenditures			
	2011	2012	% Change
Total Visitor Expenditures	\$2,107,293,376	\$2,061,725,026	-2.2%
Paid Accommodations	\$1,327,886,503	\$1,319,372,476	-0.6%

Average Per Person Per Day Expenditures		
2011	2012	% Change
\$114.18	\$118.79	+4.0%

First-Time/Repeat Visitors to Lee County		
	2011	2012
First-time	26%	25%
Repeat	72%	74%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
Hotel/Motel/Resort/B&B	61.9%	64.2%	3.7%	\$140.21	\$144.32	2.9%	\$86.75	\$92.59	6.7%
Condo/Cottage/Vacation Home	61.6%	63.1%	2.6%	\$179.07	\$184.67	3.1%	\$110.24	\$116.59	5.8%
RV Park/Campground	55.2%	53.2%	-3.6%	\$47.30	\$50.62	7.0%	\$26.12	\$26.95	3.2%
<b>AVERAGE</b>	<b>60.2%</b>	<b>61.3%</b>	<b>1.8%</b>	<b>\$128.91</b>	<b>\$134.52</b>	<b>4.3%</b>	<b>\$77.63</b>	<b>\$82.48</b>	<b>6.2%</b>

## Visitor Profile Analysis August 2012

*A total of 205 interviews were conducted with visitors in Lee County during the month of August 2012. A total sample of this size is considered accurate to plus or minus 6.8 percentage points at the 95% confidence level.*

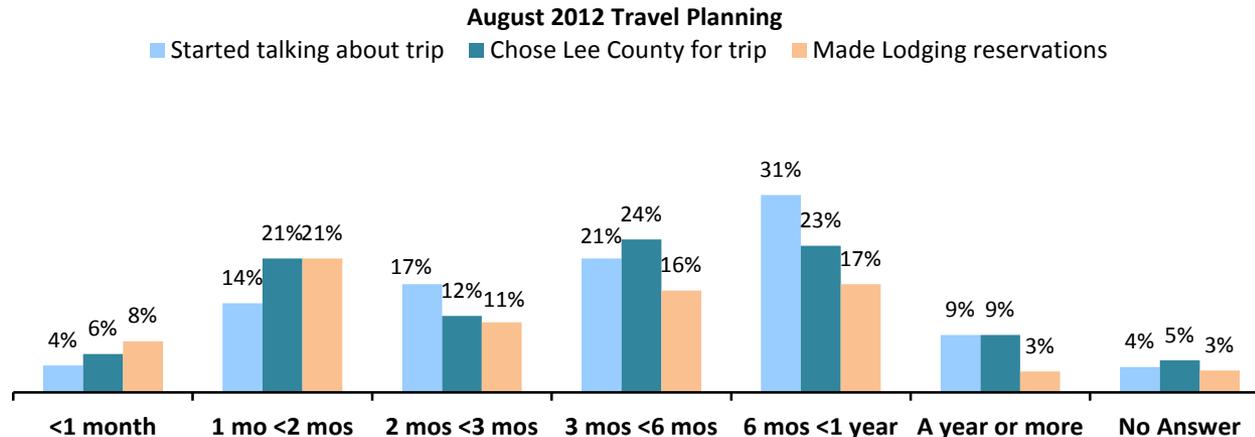
*A total of 203 interviews were conducted with visitors in Lee County during the month of August 2011. A total sample of this size is considered accurate to plus or minus 6.9 percentage points at the 95% confidence level.*

*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
<b>Total Respondents</b>	<b>203</b>	<b>205</b>	<b>203</b>	<b>205</b>	<b>203</b>	<b>205</b>
<u>Less than 3 months (NET)</u>	<u>29%</u>	<u>35%</u>	<u>35%</u>	<u>39%</u>	<u>48%</u>	<u>40%</u>
<1 month	2%	4%	5%	6%	8%	8%
1 month - <2 months	12%	14%	16%	21%	23%	21%
2 months - <3 months	15%	17%	14%	12%	18%	11%
<u>3 months or more (NET)</u>	<u>69%</u>	<u>62%</u>	<u>61%</u>	<u>55%</u>	<u>44%</u>	<u>35%</u>
3 months - <6 months	31%B	21%	31%	24%	28%B	16%
6 months - <1 year	31%	31%	24%	23%	14%	17%
A year or more	8%	9%	6%	9%	1%	3%
No Lodging Reservations Made	N/A	N/A	N/A	N/A	N/A	22%
No Answer	2%	4%	4%	5%	8%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
<b>Total Respondents</b>	205
	100%
<u>Any (NET)</u>	<u>96%</u>
Laptop computer	70%
Desktop computer	50%
Smartphone (iPhone, Blackberry, etc.)	48%
Tablet (iPad, etc.)	27%
E-Reader (Nook, Kindle, etc.)	4%
Other portable device	2%
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
<b>Total Respondents who use devices for destination planning (2012) or who have access to a computer (2011)</b>	<b>186</b>	<b>197</b>
<u>Visited web sites (net)</u>	<u>82%</u>	<u>83%</u>
Airline websites	26%	34%
Search Engines	37%	32%
Hotel websites	33%	29%
Booking websites	31%	27%
Trip Advisor	21%	23%
www.FortMyers-Sanibel.com	15%	15%
Visit Florida	12%	9%
AAA	13%B	5%
Facebook	N/A	5%
Travel Channel	1%	N/A
Other	17%	13%
None/Didn't visit websites	15%	14%
No Answer	3%	3%

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

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

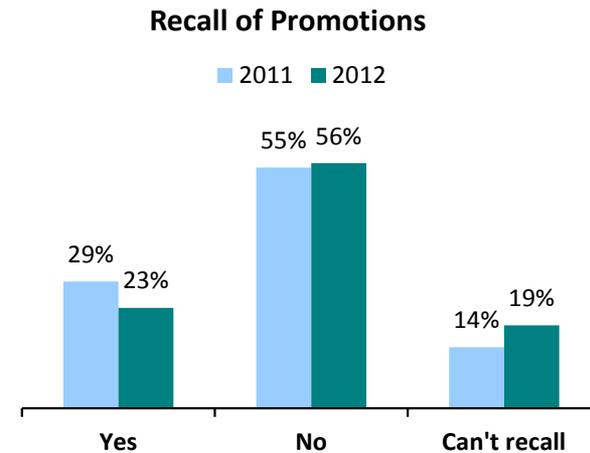
## Travel Planning

Travel Information Requested		
	2011	2012
	A	B
<b>Total Respondents</b>	<b>203</b>	<b>205</b>
<u>Requested information (NET)</u>	<u>41%</u>	<u>32%</u>
<i>Hotel Web Site</i>	22%	16%
<i>VCB website</i>	8%	6%
<i>Call hotel</i>	6%	5%
<i>Visitor Guide</i>	4%	3%
<i>Other</i>	16%B	10%
<u>None/Did not request information</u>	<u>50%</u>	<u>64%A</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
<b>Total Respondents</b>	<b>203</b>	<b>205</b>
Yes	29%	23%
No	55%	56%
Can't Recall	14%	19%

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



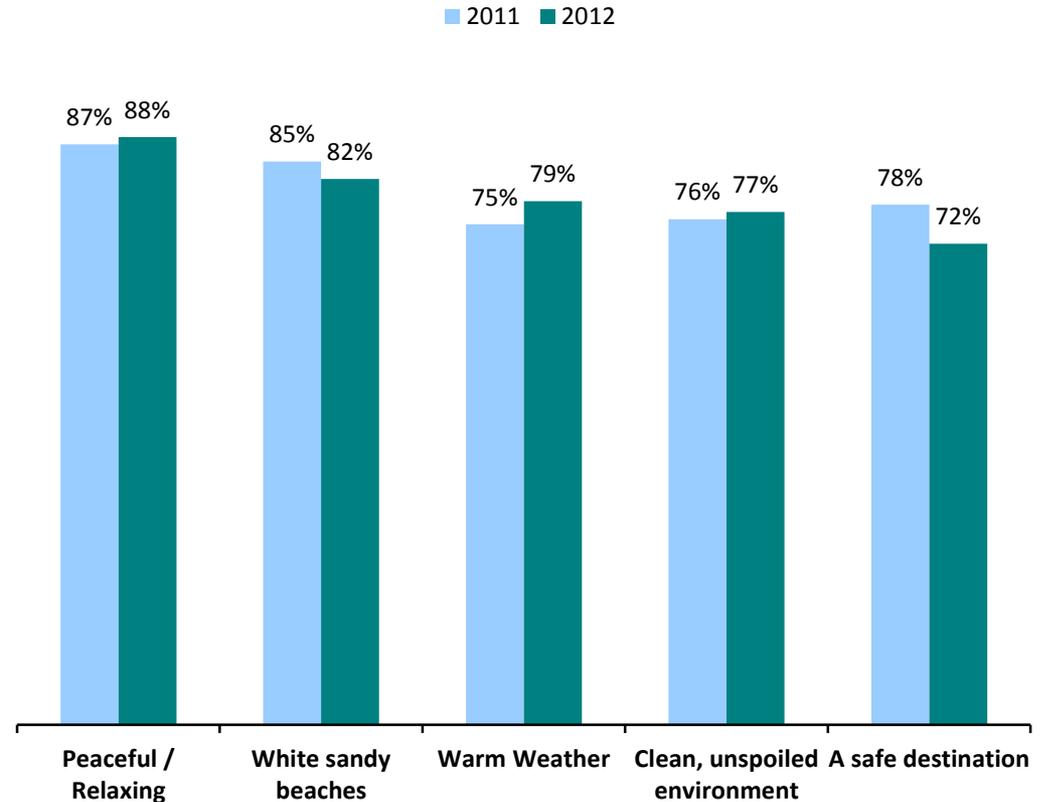
## Travel Planning

Travel Decision Influences*		
	2011	2012
	A	B
<b>Total Respondents</b>	<b>203</b>	<b>205</b>
Peaceful / Relaxing	87%	88%
White sandy beaches	85%	82%
Warm weather	75%	79%
Clean, unspoiled environment	76%	77%
A safe destination	78%	72%
A "family" atmosphere	65%	72%
Convenient location	75%	70%
Good value for the money	74%	68%
Upscale accommodations	64%	64%
Reasonably priced lodging	70%	63%
Plenty to see and do	62%	63%
Affordable dining	62%	57%

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

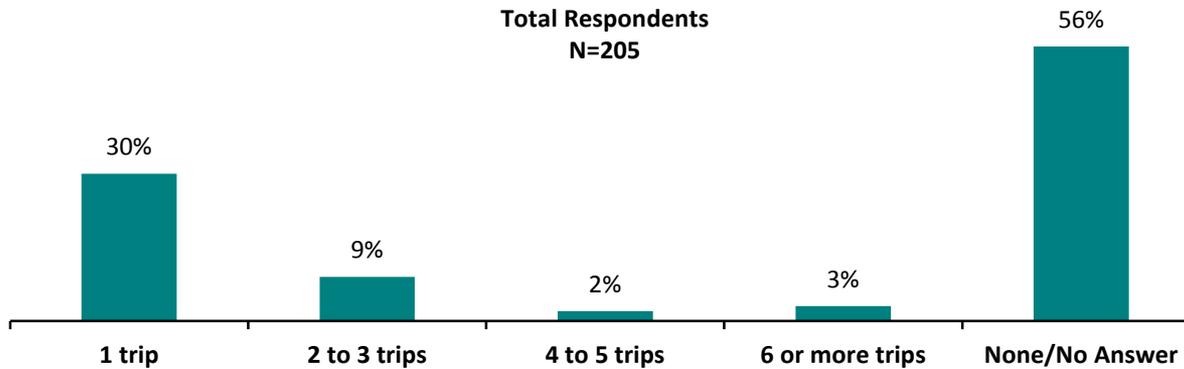
Mode of Transportation		
	2011	2012
	A	B
<b>Total Respondents</b>	<b>203</b>	<b>205</b>
Fly	60%	61%
Drive a personal vehicle	34%	32%
Drive a rental vehicle	5%	7%
Drive an RV	1%	-
Other/No Answer (NET)	<1%	<1%

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

Airport Used		
	2011	2012
	A	B
<b>Total Respondents</b>	<b>121</b>	<b>124</b>
SW Florida Int'l (Fort Myers)	74%	72%
Miami Int'l	7%	10%
Orlando Int'l	8%	7%
Tampa Int'l	8%	4%
Ft. Lauderdale Int'l	1%	1%
West Palm Beach Int'l	-	-
Other/No Answer (NET)	3%	6%

Q2: At which Florida airport did you land?

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



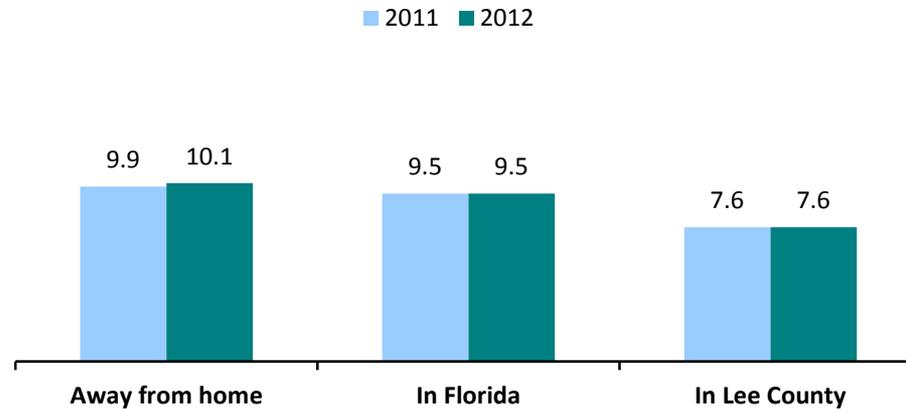
Q40. In the past year, how many trips have you taken where you used Southwest Florida International airport (Fort Myers) for your air travel?  
Note: New question added in January 2012.

## Trip Profile

Trip Length Mean # of Days			
	2011	2012	% Change
	A	B	
<b>Total Respondents</b>	<b>203</b>	<b>205</b>	
Away from home	9.9	10.1	2.1%
In Florida	9.5	9.5	-
In Lee County	7.6	7.6	-

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

### Trip Length (mean # of days)

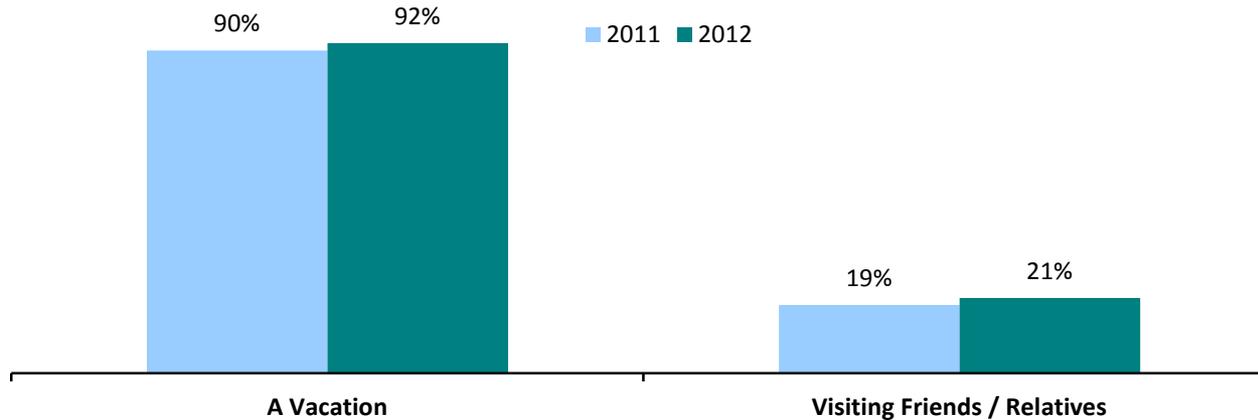


### Trip Profile

Reason(s) for Visit		
	2011	2012
	A	B
<b>Total Respondents</b>	<b>203</b>	<b>205</b>
A Vacation	90%	92%
Visiting Friends / Relatives	19%	21%
Personal Business	2%	4%
Other Business Trip	2%	1%
A Convention / Trade Show	<1%	<1%
A Conference / Meeting	1%	<1%
Sporting Event(s)	1%	-
Other/No Answer	4%B	<1%

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

### Reason for August 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
<b>Total Respondents</b>	<b>203</b>	<b>205</b>	<b>38*</b>	<b>38*</b>	<b>98</b>	<b>114</b>	<b>45*</b>	<b>48*</b>
First-time visitor	34%	26%	10%	8%	34%B	20%	50%	54%
Repeat visitor	64%	73%	90%	89%	64%	80%A	46%	44%
No Answer	2%	1%	-	3%	2%	-	4%	2%

Q15: Is this your first visit to Lee County?

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

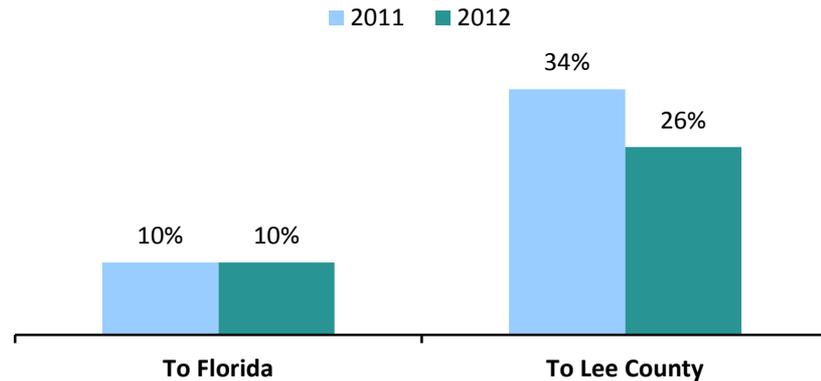
\*\*N/A: Insufficient number of responses for statistical analysis (N<30).

First Time Visitors to Florida		
	2011	2012
<b>Total Respondents</b>	<b>203</b>	<b>205</b>
	<b>A</b>	<b>B</b>
Yes, first-time visitor	10%	10%
No	68%	71%
No answer	3%	<1%
<i>FL Residents*</i>	19%	18%

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

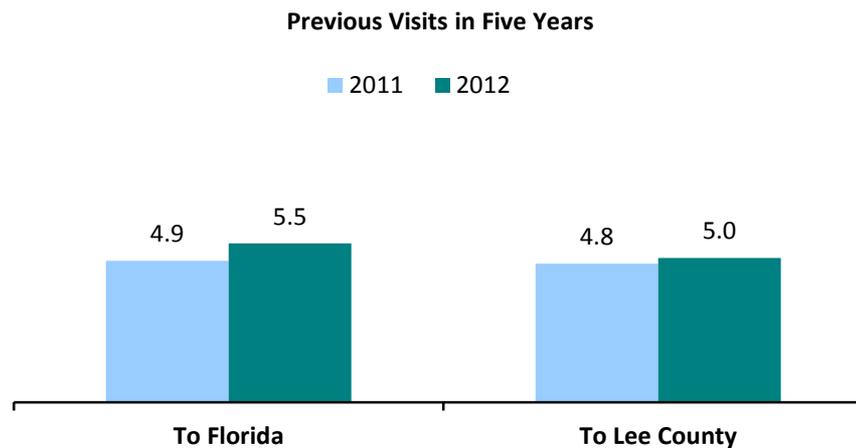


## Trip Profile

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	139(FL res. Excl)	146(FL res. Excl)	130	149
Number of visits	4.9	5.5	4.8	5.0

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

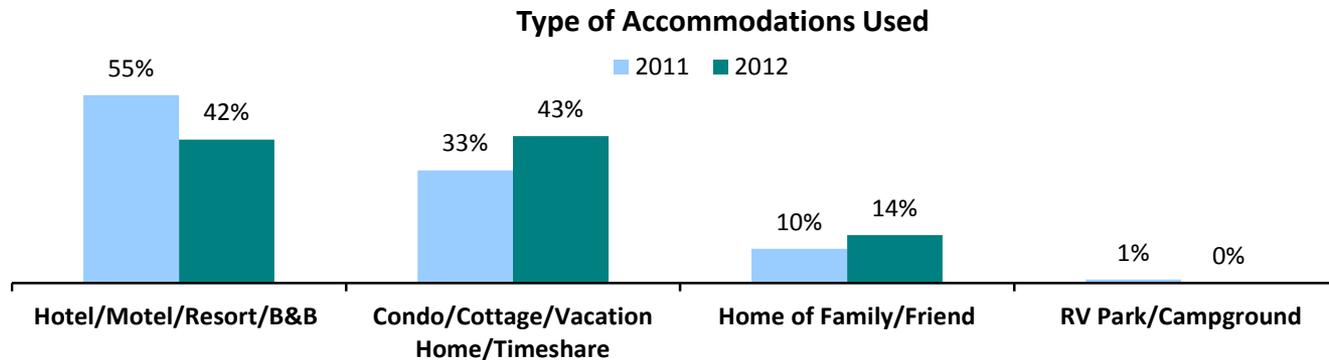
Q16: Over the past five (5) years, how many times have you visited Lee County?



## Trip Profile

Type of Accommodations Used		
	2011	2012
	A	B
<b>Total Respondents</b>	<b>203</b>	<b>205</b>
<b><u>Hotel/Motel/Resort/B&amp;B (NET)</u></b>	<b><u>55%B</u></b>	<b><u>42%</u></b>
At a resort	26%	23%
At a hotel/motel/historic inn	29%B	18%
At a Bed and Breakfast	<1%	<1%
<b><u>Condo/Cottage/Vacation Home/Timeshare (NET)</u></b>	<b><u>33%</u></b>	<b><u>43%A</u></b>
Rented home/condo	27%	28%
Owned home/condo	2%	11%A
Borrowed home/condo	4%	4%
<b>At the home of family or a friend</b>	<b>10%</b>	<b>14%</b>
<b>RV Park/Campground (NET)</b>	<b>1%</b>	<b>-</b>
<b>Daytripper (No Accommodations)</b>	<b>2%</b>	<b>1%</b>

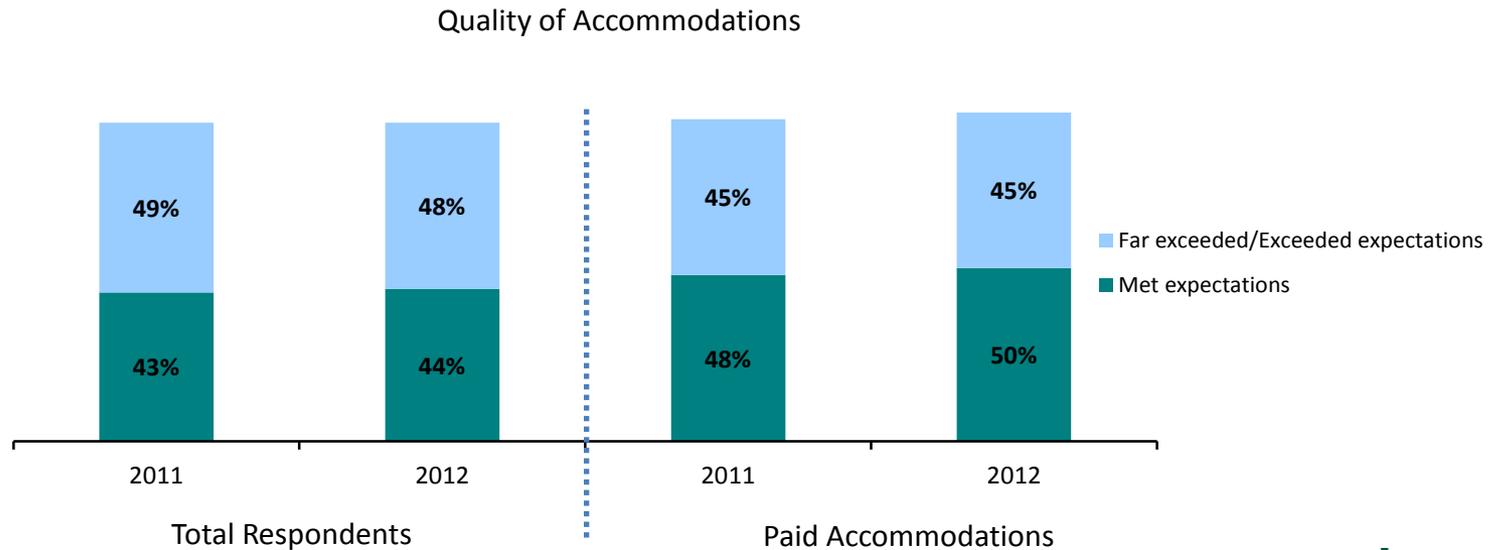
Q20: Are you staying overnight (either last night or tonight):



## Trip Profile

Quality of Accommodations				
	Total Respondents		Paid Accommodations	
	2011	2012	2011	2012
	A	B	A	B
<b>Respondents</b>	<b>203</b>	<b>205</b>	<b>167</b>	<b>143</b>
Far exceeded/Exceeded expectations	49%	48%	45%	45%
Met your expectations	43%	44%	48%	50%
Did not meet/Far below expectations	5%	3%	5%	4%
No Answer	3%	4%	2%	2%

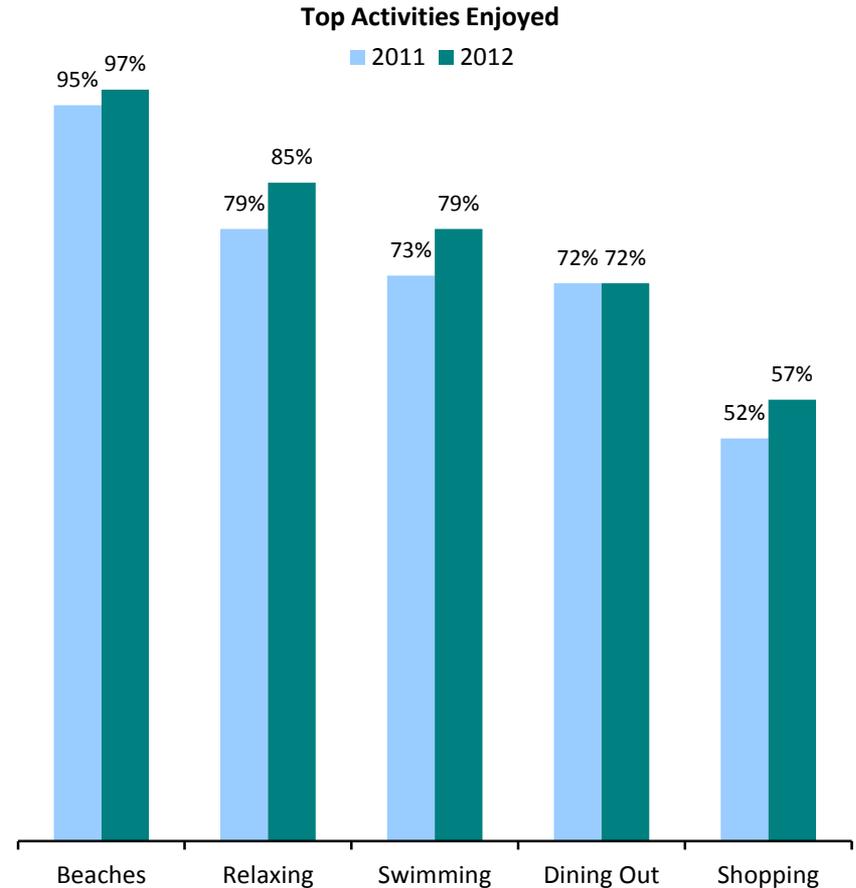
Q21: How would you describe the quality of your accommodations? Do you feel they:



## Trip Activities

Activities Enjoyed		
	2011	2012
	A	B
<b>Total Respondents</b>	<b>203</b>	<b>205</b>
Beaches	95%	97%
Relaxing	79%	85%
Swimming	73%	79%
Dining Out	72%	72%
Shopping	52%	57%
Shelling	42%	47%
Sightseeing	44%B	31%
Attractions	28%	27%
Visiting Friends/Relatives	23%	20%
Photography	23%	18%
Watching Wildlife	21%	18%
Exercise / Working Out	13%	18%
Bicycle Riding	12%	18%
Boating	11%	16%
Fishing	14%	16%
Miniature Golf	12%	13%
Parasailing / Jet Skiing	14%	12%
Birdwatching	12%	10%
Bars / Nightlife	14%	10%
Kayaking / Canoeing	7%	8%
Golfing	8%	7%
Guided Tour	8%	6%
Scuba Diving / Snorkeling	2%	4%
Cultural Events	4%	4%
Tennis	3%	2%
Sporting Event	2%	2%
Other	2%	1%
No Answer	1%	1%

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

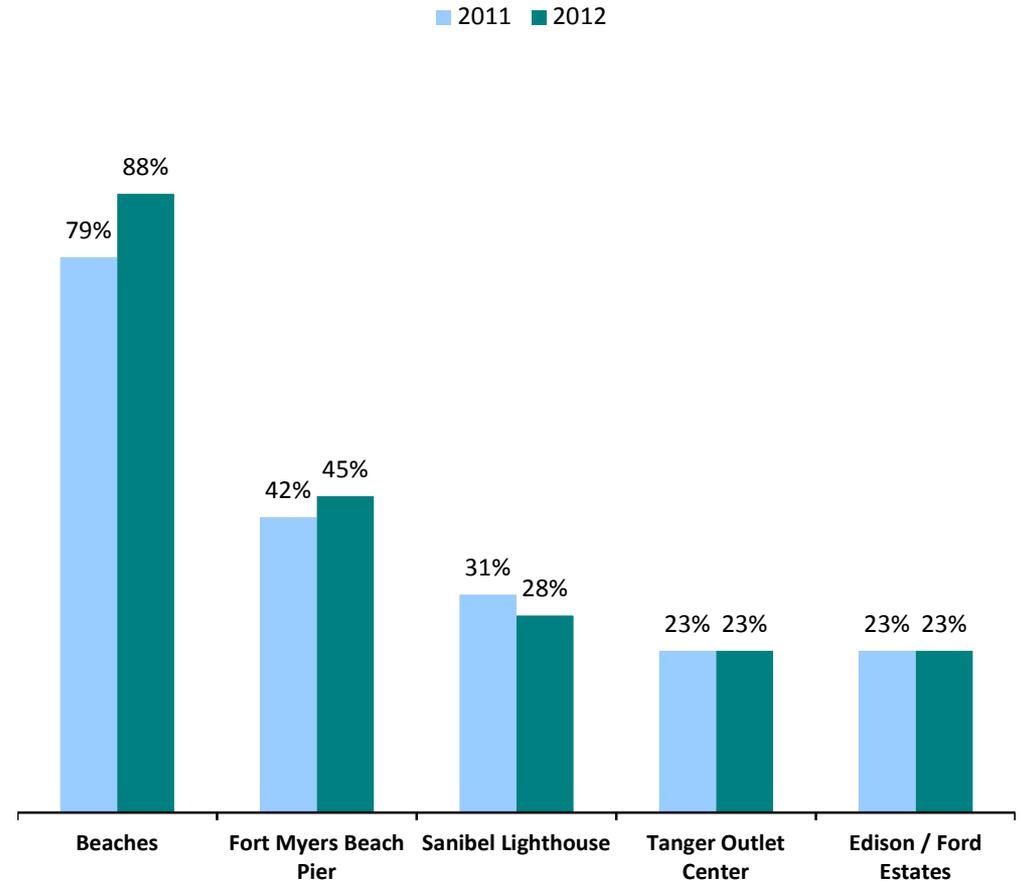


## Trip Activities

Attractions Visited		
	2011	2012
	A	B
<b>Total Respondents</b>	<b>203</b>	<b>205</b>
Beaches	79%	88%A
Fort Myers Beach Pier	42%	45%
Sanibel Lighthouse	31%	28%
Tanger Outlet Center	23%	23%
Edison / Ford Estates	23%	23%
Miromar Outlets Mall	18%	17%
Periwinkle Place	16%	14%
Ding Darling National Wildlife Refuge	15%	13%
Coconut Point Mall	11%	12%
Gulf Coast Town Center	4%	10%A
Shell Factory and Nature Park	14%	9%
Bell Tower Shops	8%	9%
Edison Mall	8%	8%
Bailey-Matthews Shell Museum	5%	3%
Manatee Park	4%	3%
Babcock Wilderness Adventures	-	1%
Broadway Palm Dinner Theater	2%	1%
Other	4%	5%
None/No Answer	7%	5%

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

### Top Attractions Visited



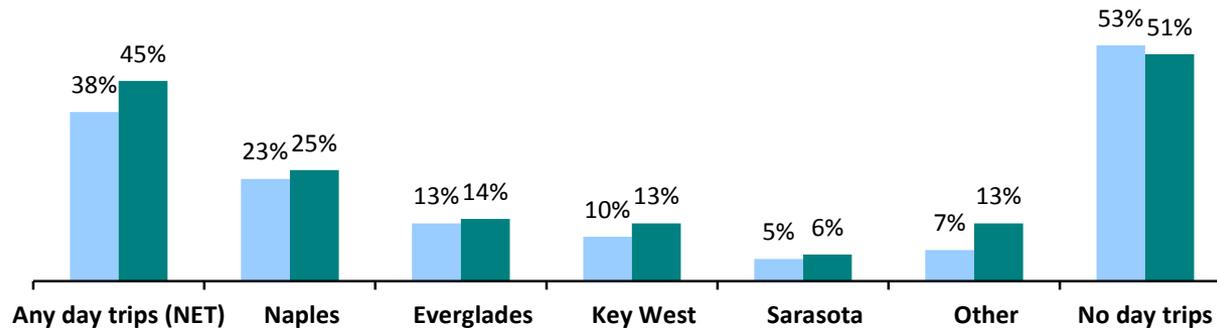
### Trip Activities

Day Trips Outside Lee County		
	2011	2012
	A	B
<b>Total Respondents</b>	<b>203</b>	<b>205</b>
<u>Any day trips (NET)</u>	<u>38%</u>	<u>45%</u>
<i>Naples</i>	23%	25%
<i>Everglades</i>	13%	14%
<i>Key West</i>	10%	13%
<i>Sarasota</i>	5%	6%
<i>Other</i>	7%	13%A
<u>No day trips</u>	<u>53%</u>	<u>51%</u>
No Answer	13%	13%

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

### Day Trips Outside Lee County

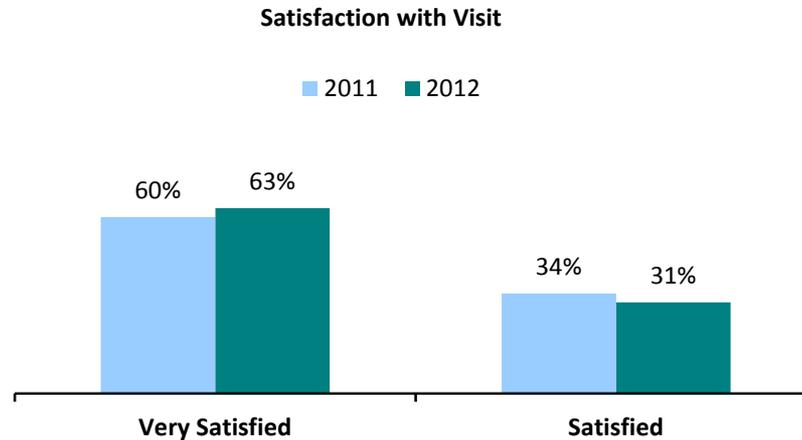
■ 2011 ■ 2012



## Lee County Experience

Satisfaction with Visit		
	2011	2012
	A	B
<b>Total Respondents</b>	<b>203</b>	<b>205</b>
<u>Satisfied</u>	<u>94%</u>	<u>94%</u>
<i>Very Satisfied</i>	60%	63%
<i>Satisfied</i>	34%	31%
Neither	1%	1%
Dissatisfied/Very Dissatisfied	1%	0%
Don't know/no answer	4%	4%

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



## Future Plans

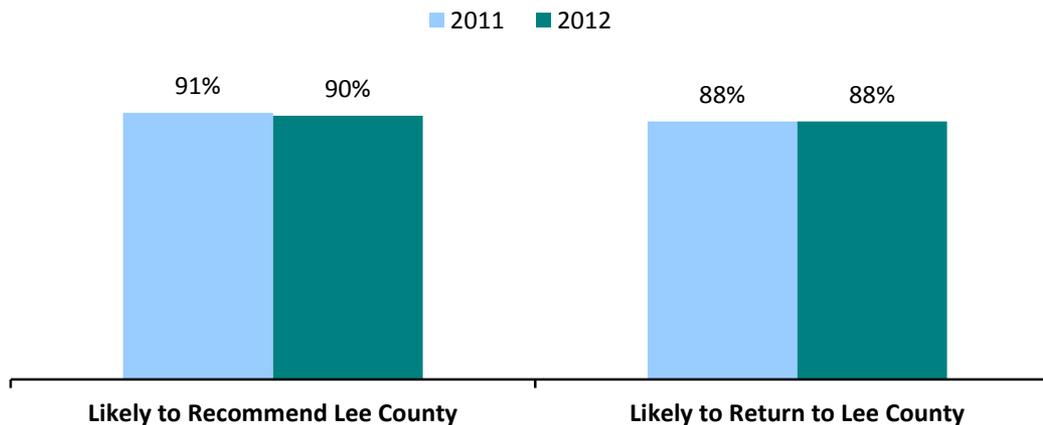
Likelihood to Recommend/Return to Lee County		
	2011	2012
	A	B
<b>Total Respondents</b>	<b>203</b>	<b>205</b>
Likely to Recommend Lee County	91%	90%
Likely to Return to Lee County	88%	88%
<b>Base: Total Respondents Planning to Return</b>	<b>179</b>	<b>180</b>
Likely to Return Next Year	52%	54%

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?

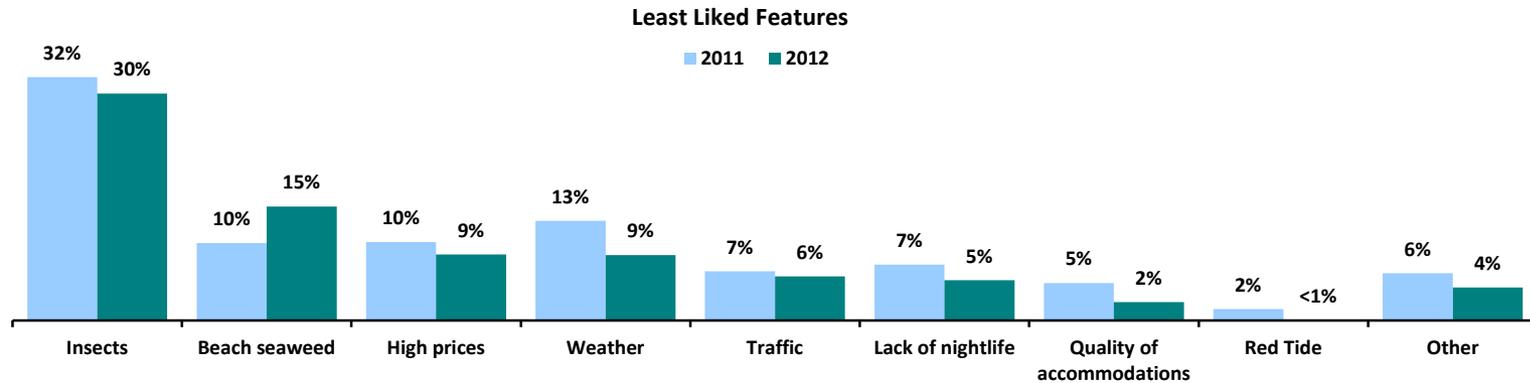
### Likelihood to Recommend/Return to Lee County (Responded "Yes")



## Trip Activities

Least Liked Features		
	2011	2012
	A	B
<b>Total Respondents</b>	<b>203</b>	<b>205</b>
Insects	32%	30%
Beach seaweed	10%	15%
Weather	13%	9%
High prices	10%	9%
Traffic	7%	6%
Lack of nightlife	7%	5%
Quality of accommodations	5%	2%
Red Tide	2%	<1%
Other	6%	4%
Nothing/No Answer (NET)	35%	40%

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

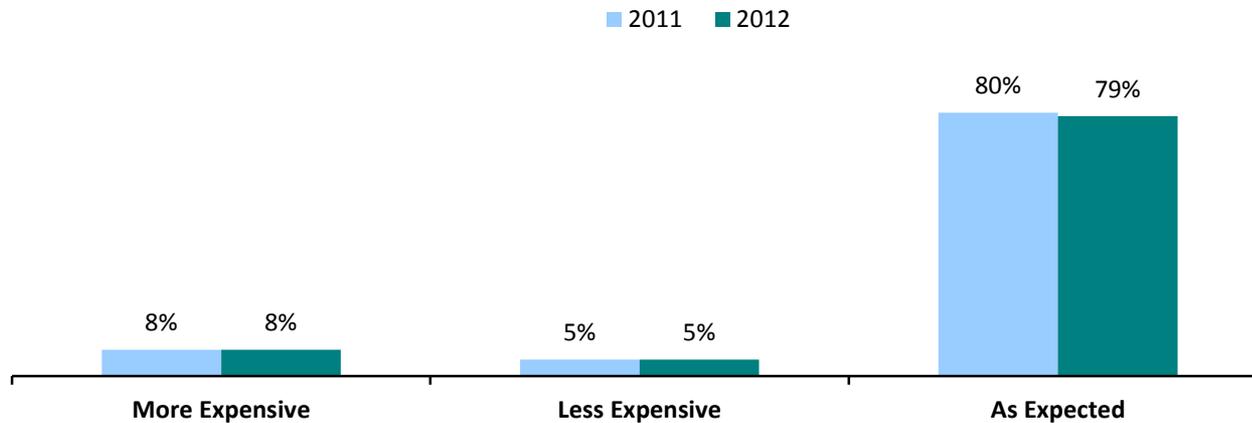


### Trip Activities

Perception of Lee County as Expensive		
	2011	2012
	A	B
<b>Total Respondents</b>	<b>203</b>	<b>205</b>
More Expensive	8%	8%
Less Expensive	5%	5%
As Expected	80%	79%
Don't know/No Answer (NET)	7%	7%

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
<b>Total Respondents</b>	<b>203</b>	<b>205</b>
Age of respondent (mean)	44.6	47.0
Annual household income (mean)	\$105,367	\$104,876
Martial Status		
Married	74%	74%
Single	15%	10%
Vacations per year (mean)	2.3	2.4
Short getaways per year (mean)	3.2	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
<b>Total Respondents</b>	<b>203</b>	<b>205</b>
Family	56%	63%
Couple	24%	25%
Single	6%	6%
Group of couples/friends	8%	4%
Mean travel party size	3.6	3.5
Mean adults in travel party	2.7	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
<b>Total Respondents</b>	<b>203</b>	<b>205</b>
<u>Traveling with any Children (net)</u>	<u>48%</u>	<u>51%</u>
Any younger than 6	12%	15%
Any ages 6-11	26%	24%
Any 12-17 years old	26%	31%
No Children	52%	49%

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	54%	52%	163,673	182,484	11.5%
Friends/Relatives	46%	48%	140,501	171,139	21.8%
<i>Total Visitation</i>			304,174	353,623	16.3%

Paid Accommodations Visitors					
	%		Visitor Estimates		
Country of Origin	2011	2012	2011	2012	% Change
United States	76%	73%	124,470	132,716	6.6%
Germany	7%	6%	11,761	11,485	-2.3%
UK	5%	5%	7,841	8,933	13.9%
France	3%	3%	4,900	6,381	30.2%
Canada	4%	3%	6,861	6,381	-7.0%
Scandinavia	1%	2%	980	3,828	290.6%
BeNeLux	1%	1%	1,960	2,552	30.2%
Ireland	1%	1%	1,960	1,276	-34.9%
Latin America	1%	1%	980	1,276	30.2%
Switzerland	0%	1%	0	1,276	-
Austria	1%	0%	980	0	-
Other International	0%	4%	0	6,381	-
No Answer	1%	0%	980	0	-

U.S. Region of Origin	2011	2012	2011	2012	% Change
Florida	28%	26%	35,283	34,455	-2.3%
South (including Florida)	43%	39%	52,924	52,321	-1.1%
Midwest	28%	36%	35,283	47,216	33.8%
Northeast	17%	21%	21,562	28,074	30.2%
West	2%	1%	2,940	1,276	-56.6%
No Answer	9%	3%	11,761	3,828	-67.4%

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

2012 Top DMAs (Paid Accommodations)		
Miami-Fort Lauderdale	13%	16,589
New York	8%	10,209
Detroit	6%	7,657
Tampa-Saint Petersburg	5%	6,381
West Palm Beach	5%	6,381
Indianapolis	5%	6,381
Pittsburgh	5%	6,381
Saint Louis	5%	6,381

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

## Occupancy Data Analysis August 2012

*Property managers representing 113 properties in Lee County were interviewed for the August 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 August 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

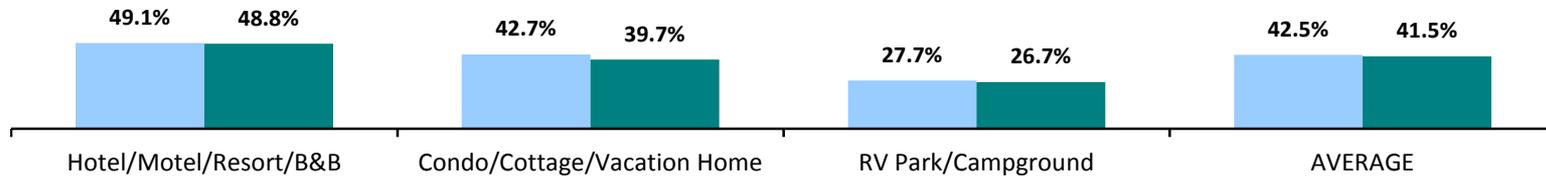
	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
<b>Property Managers Responding</b>	<b>98</b>	<b>107</b>		<b>98</b>	<b>108</b>		<b>98/98</b>	<b>107/108</b>	
Hotel/Motel/Resort/B&B	49.1%	48.8%	-0.6%	\$110.35	\$111.20	0.8%	\$54.17	\$54.23	0.1%
Condo/Cottage/Vacation Home	42.7%	39.7%	-7.0%	\$136.04	\$135.68	-0.3%	\$58.12	\$53.89	-7.3%
RV Park/Campground	27.7%	26.7%	-3.6%	\$39.55	\$41.07	3.8%	\$10.95	\$10.97	0.2%
<b>AVERAGE</b>	<b>42.5%</b>	<b>41.5%</b>	<b>-2.4%</b>	<b>\$105.17</b>	<b>\$105.99</b>	<b>0.8%</b>	<b>\$44.70</b>	<b>\$43.98</b>	<b>-1.6%</b>

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

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

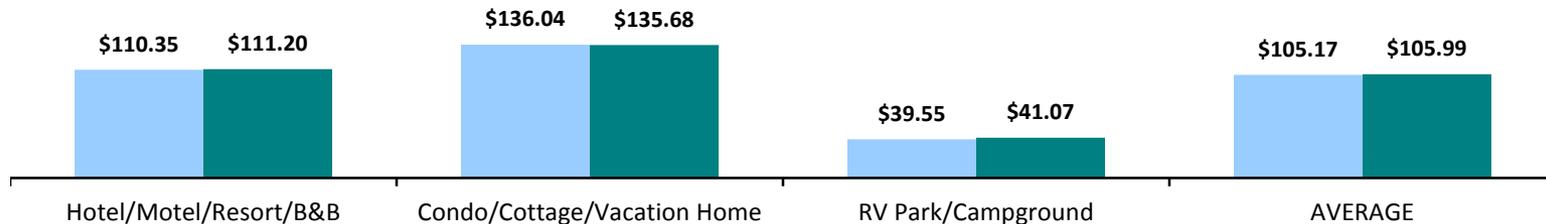
### Average Occupancy Rate

■ 2011 ■ 2012



### Average Daily Rate

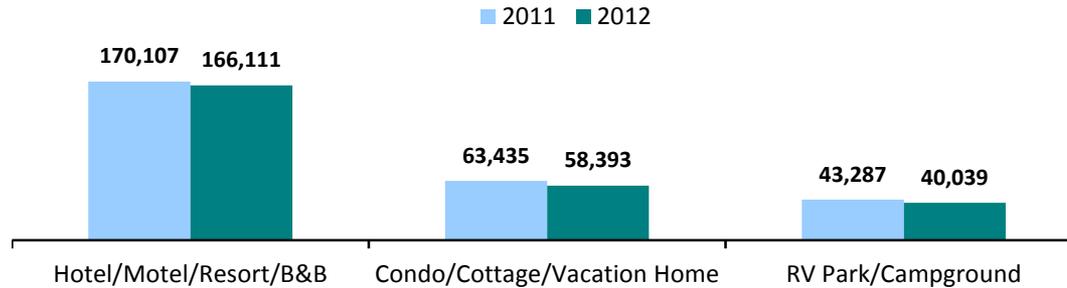
■ 2011 ■ 2012



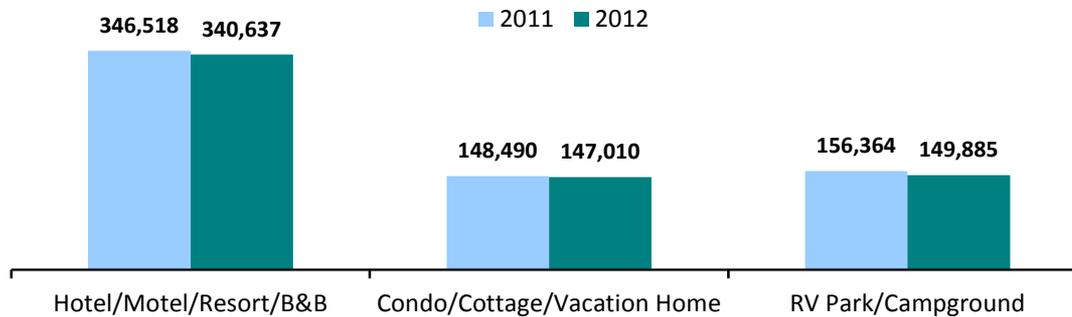
### Room/Unit/Site Nights

	Occupied Room Nights			Available Room Nights		
	2011	2012	% Change	2011	2012	% Change
Hotel/Motel/Resort/B&B	170,107	166,111	-2.3%	346,518	340,637	-1.7%
Condo/Cottage/Vacation Home	63,435	58,393	-7.9%	148,490	147,010	-1.0%
RV Park/Campground	43,287	40,039	-7.5%	156,364	149,885	-4.1%
<b>Total</b>	<b>276,829</b>	<b>264,543</b>	<b>-4.4%</b>	<b>651,372</b>	<b>637,532</b>	<b>-2.1%</b>

Occupied Room Nights



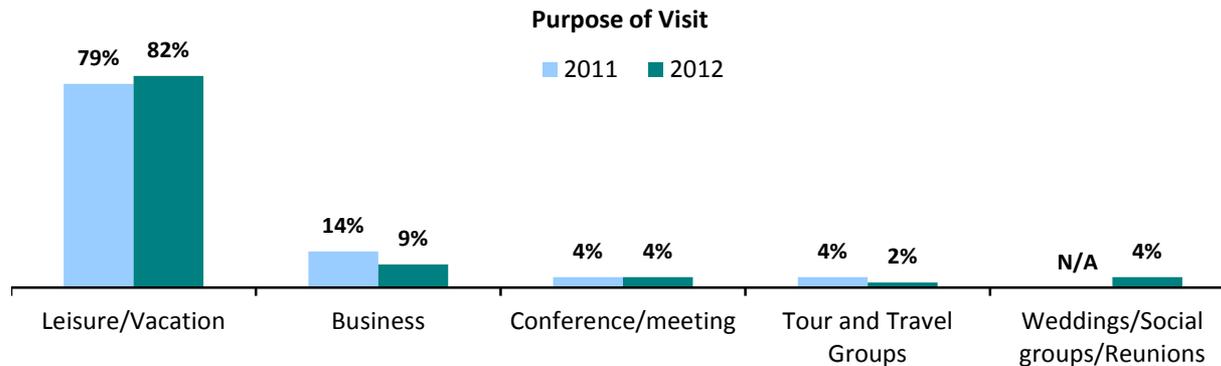
Available Room Nights



## Lodging Management Estimates

Guest Profile		
	2011	2012
	A	B
<b>Property Managers Responding</b>	<b>90</b>	<b>97</b>
<u>Purpose of Visit</u>		
Leisure/Vacation	79%	82%
Business	14%	9%
Conference/meeting	4%	4%
Tour and Travel Groups	4%	2%
Weddings/Social groups/Reunions (net)	N/A	4%
<b>Property Managers Responding</b>	<b>94</b>	<b>102</b>
Average guests per room	2.5	2.6
<b>Property Managers Responding</b>	<b>92</b>	<b>100</b>
Average length of stay in nights	4.8	4.9

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



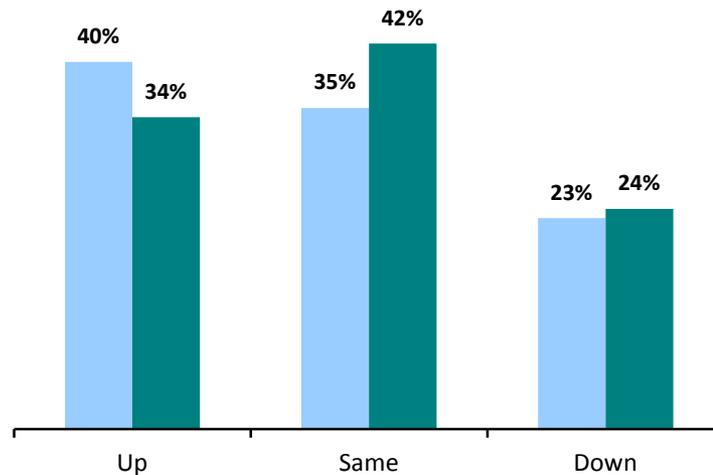
## Occupancy Barometer

Level of Reservations for Next 3 Months Compared to Last Year		
	2011	2012
	A	B
<b>Total Respondents</b>	<b>93</b>	<b>106</b>
<u>Up/Same (net)</u>	<u>75%</u>	<u>75%</u>
Up	40%	34%
Same	35%	42%
Down	23%	24%

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

**Level of Reservations for Next 3 Months**

■ 2011 vs 2010   ■ 2012 vs 2011

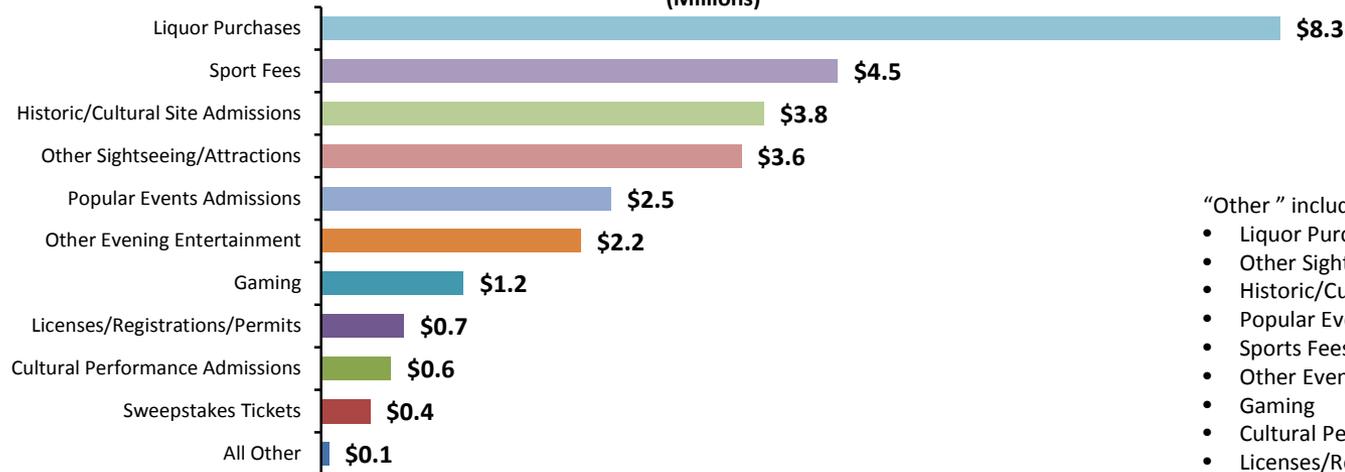


**Economic Impact Analysis**  
**August 2012**

## Total Visitor Expenditures by Spending Category

TOTAL EXPENDITURES			
	2011	2012	% Change
<u>TOTAL</u>	<u>\$157,362,342</u>	<u>\$149,765,868</u>	<u>-4.8%</u>
Food and Beverages	\$43,505,064	\$41,199,571	-5.3%
Shopping	\$41,440,397	\$39,947,188	-3.6%
Lodging Accommodations	\$29,113,635	\$28,038,515	-3.7%
Ground Transportation	\$14,592,680	\$12,523,531	-14.2%
Other	\$28,710,566	\$28,057,063	-2.3%

August 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

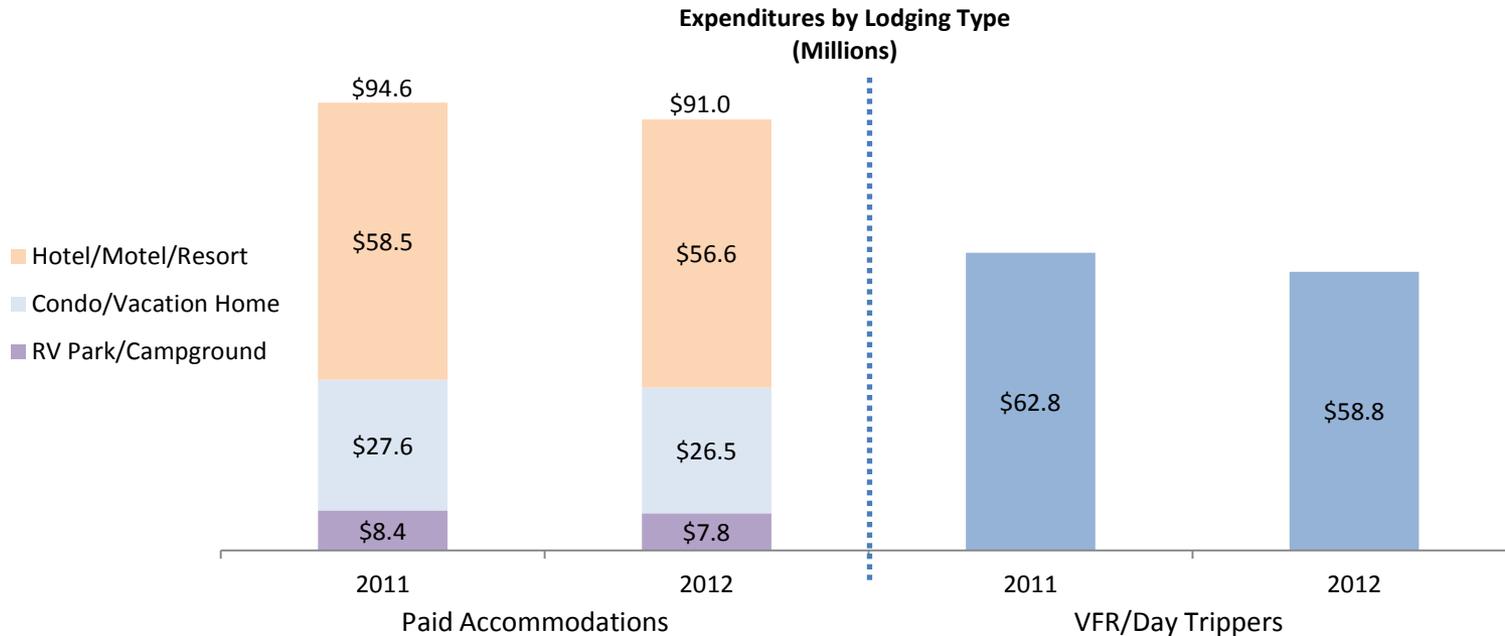
TOTAL EXPENDITURES						
	Staying Paid Accommodations			Visiting Friends and Relatives/Day Trippers		
	2011	2012	% Change	2011	2012	% Change
<b>TOTAL</b>	<u>\$94,558,552</u>	<u>\$90,976,682</u>	<u>-3.8%</u>	<u>\$62,803,790</u>	<u>\$58,789,186</u>	<u>-6.4%</u>
Lodging Accommodations	\$29,113,635	\$28,038,515	-3.7%	\$0	\$0	
Food and Beverages	\$22,056,576	\$21,526,448	-2.4%	\$21,448,488	\$19,673,123	-8.3%
Shopping	\$21,734,448	\$20,754,926	-4.5%	\$19,705,949	\$19,192,262	-2.6%
Ground Transportation	\$7,237,411	\$7,225,950	-0.2%	\$7,355,269	\$5,297,581	-28.0%
Other	\$14,416,482	\$13,430,843	-6.8%	\$14,294,084	\$14,626,220	2.3%

“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
<b>TOTAL</b>	<u>\$157,362,342</u>	<u>\$149,765,868</u>	<u>-4.8%</u>	<u>100%</u>	<u>100%</u>
Visiting Friends & Relatives/Day Trippers	\$62,803,790	\$58,789,186	-6.4%	40%	39%
<u>Paid Accommodations</u>	<u>\$94,558,552</u>	<u>\$90,976,682</u>	<u>-3.8%</u>	<u>60%</u>	<u>61%</u>
<i>Hotel/Motel/Resort/B&amp;B</i>	<i>\$58,533,712</i>	<i>\$56,608,026</i>	<i>-3.3%</i>	<i>37%</i>	<i>38%</i>
<i>Condo/Cottage/Vacation Home</i>	<i>\$27,583,690</i>	<i>\$26,523,382</i>	<i>-3.8%</i>	<i>18%</i>	<i>18%</i>
<i>RV Park/Campground</i>	<i>\$8,441,150</i>	<i>\$7,845,274</i>	<i>-7.1%</i>	<i>5%</i>	<i>5%</i>



**Appendix**  
**August 2012**

## August 2012 Interviewing Statistics

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

## Occupancy Interviewing Statistics

Interviews were conducted from September 1 – September 15, 2012. Information was provided by 113 Lee County lodging properties.

Lodging Type	Number of Interviews
Hotel/Motel/Resort/B&Bs	71
Condo/Cottage/Vacation Home/Timeshare	25
RV Park/Campground	17
<b>Total</b>	<b>113</b>