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

June 2012 Visitor Profile and Occupancy Analysis
August 10, 2012

Prepared for:

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

Prepared by:

Executive Summary
June 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.

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Executive Summary

Visitation Estimates

- During June 2012, Lee County hosted 234,000 visitors staying in paid accommodations and just under 190,000 staying with friends or relatives while visiting, for a total of 423,000 visitors.
- Visitation among paid accommodations guests was up 2.8% and visitation among those staying with friends or relatives rebounded from 2011*, bringing it closer to 2010 estimates. As a result, the total number of visitors during June 2012 was 26.3% higher than the prior year.

Estimated Visitation	2011	2012	% Change
Paid Accommodations	227,638	233,907	+2.8%
Friends/Relatives	107,162	189,068	+76.4%
Total Visitation	**334,800**	**422,975**	**+26.3%**

Visitor Expenditures

- June 2012 visitors spent an estimated $193 million during their stay. Total spending for June 2012 increased 10.6% from June 2011, continuing an upward trend from June 2010. However, total estimated expenditures for the first half of 2012 were down somewhat versus a year ago (-2.2%).
- Paid accommodations guests contributed $106 million to the total – a 5% increase over June 2011. Those visiting friends and relatives contributed $87 million, representing an 18.1% increase year-over-year.

Estimated Expenditures	2011	2012	% Change
Paid Accommodations	$100,955,361	$106,047,942	+5.0%
Friends/Relatives	$73,805,001	$87,163,521	+18.1%
Total Expenditures	**$174,760,362**	**$193,211,463**	**+10.6%**

** Note: When looking at the 5-year trends from 2008 through 2012* ***for the month of June****, estimated visitation among those staying with friends or relatives was at a record low in 2011.*

Visitor Origin

- The majority of June 2012 visitors staying in paid accommodations were U.S. residents (82%) – the same as last year (81%). International visitors staying in paid accommodations predominantly came from UK and Germany. Lee County experienced a notable increase in the estimated number of Germany visitors during June 2012 versus a year ago, while estimates of visitors from UK and Canada were down.

- Roughly four in ten June 2012 domestic paid accommodations guests came from the South and the same number from the Midwest. Two in ten were from the Northeast and very few from the West.

- The top two domestic feeder markets for June 2012 paid accommodations guests were Columbus, OH and Indianapolis (6% each) followed by Philadelphia and Tampa-Saint Petersburg.

2012 Top DMAs (Paid Accommodations)

Columbus, OH	6%	11,450
Indianapolis	6%	11,450
Philadelphia	5%	9,814
Tampa-Saint Petersburg	5%	9,814
Cincinnati	4%	8,179
Detroit	4%	8,179
West Palm Beach-Fort Pierce	4%	8,179
New York	4%	8,179
Miami-Fort Lauderdale	4%	8,179

Visitors Staying in Paid Accommodations

	%		Visitor Estimates		% Change
Country of Origin	**2011**	**2012**	**2011**	**2012**	
United States	81%	82%	183,319	191,378	4.4%
UK	5%	4%	12,087	9,814	-18.8%
Germany	3%	3%	6,043	8,179	35.3%
Canada	4%	2%	8,058	4,907	-39.1%
France	-	2%	-	4,907	-
Scandinavia	3%	1%	6,043	3,271	-45.9%
BeNeLux	-	1%	-	3,271	-
Switzerland	1%	1%	2,014	1,636	-18.8%
Austria	1%	1%	2,014	1,636	-18.8%
Other Europe	-	1%	-	3,271	-
No Answer	4%	1%	8,058	1,636	-79.7%

Visitors Staying in Paid Accommodations

	%		Visitor Estimates		% Change
U.S. Region of Origin	**2011**	**2012**	**2011**	**2012**	
Florida	31%	17%	56,406	32,714	-42.0%
South (including Florida)	44%	37%	80,580	70,336	-12.7%
Midwest	29%	37%	52,377	70,336	34.3%
Northeast	10%	19%	18,130	35,986	98.5%
West	4%	3%	8,058	6,543	-18.8%
No Answer	13%	4%	24,174	8,179	-66.2%

< > 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 majority of June 2012 visitors reported they started talking about, chose, and made reservations for their Lee County trip at least three months in advance. The incidence of pre-planning in this timeframe was somewhat higher than that claimed by June 2011 visitors.
    - 75% started talking about trip in that timeframe (vs. 66% June 2011)
    - 71% chose Lee County for trip (vs. 60% June 2011)
    - 57% made lodging reservation (vs. 47% June 2011)

- As is typical, most visitors said they used some combination of websites to plan their Lee County trip – the highest proportion claiming they used airline websites (39%). While computers were still the most frequently mentioned way visitors said they typically access online destination planning information, four in ten visitors indicated they use a smartphone (41%).

- When talking about coming to Lee County, the attributes that received the highest ratings among June 2012 visitors with regard to influencing their selection were:
    - *Peaceful/relaxing* (90%),
    - *White sandy beaches* (85%),
    - *Warm weather* (84%), and
    - *A safe destination (83%).*

  These attributes were rated more favorably among June 2012 visitors versus their 2011 counterparts, as were the following statements: *A 'family' atmosphere, upscale accommodations,* and *reasonably priced lodging.*

Visitor Profile

- Two-thirds of June 2012 visitors flew to the area (65%), and most flew into Southwest Florida International Airport (82%) – the same pattern observed among June 2011 visitors.

- Four in ten visitors interviewed indicated they were staying in hotel/motel/resorts (40%) during their trip while fully half said they were staying in a condo/vacation home property (50%). Half of those staying in paid accommodations reported that the quality *far exceeded* or *exceeded expectations* (53%) – a negligible improvement over last June (42%).

- The *average* length of stay in Lee County tended to be somewhat longer this year than last – by about one day (8.5 days June 2012 vs. 7.3 days June 2011), perhaps due to the higher incidence of visitors reporting they stayed in condos/vacation homes.

Visitor Profile (cont'd)

- The top activities visitors enjoyed in Lee County during June 2012 were beaches (95%), relaxing (82%), dining out (77%), swimming (74%), and to a lesser extent, shopping (63%).

- Overall, visitor satisfaction remains extremely high – nearly all (97%) of June 2012 visitors reported being *very satisfied (71%)* or *satisfied (26%)* with their visit. Almost as many indicated they are likely to return to Lee County (93%), and well over half of them said they will return next year (59%). Nine in ten said they will also recommend Lee County to a friend over other areas in Florida (93%).

- A sizeable minority said there were no features they disliked during their June 2012 Lee County visit (45%). The most prevalent dislike about the Lee County area cited was *insects* (25%), which also ranked highest among June 2011 visitors (27%). *Traffic* ranked a distant second (14%). The incidence of visitors mentioning *weather* as a dislike diminished significantly from last year to this year (7% vs. 21% June 2011).

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

    - 50 years of age on average
    - $101,500 household income on average
    - 75% married
    - 53% traveling as a family
    - 25% traveling as a couple
    - 40% traveling *with* children
    - 4 people in travel party on average

Lodging Industry Assessments

- For the Lee County lodging industry in total, *available* room nights were flat (+0.4%) from June 2011 to June 2012 while *occupied* room nights grew by 3.7%. All property categories saw an increase in *occupied* room nights to varying degrees. Hotel/motel/resort properties saw a decline in *available* room nights and condo/vacation homes held steady. However, RV park/campground properties experienced an increase in *available* room nights (+6.9%), which was not outweighed by the growth in *occupied* room nights.

	Occupied Room Nights			Available Room Nights		
	2011	2012	% Change	2011	2012	% Change
Hotel/Motel/Resort/B&B	187,946	189,351	+0.7%	345,240	339,025	-1.8%
Condo/Cottage/Vacation Home	72,512	81,125	+11.9%	147,000	145,830	-0.8%
RV Park/Campground	39,252	40,429	+3.0%	148,500	158,700	+6.9%
Total	**299,710**	**310,905**	**+3.7%**	**640,740**	**643,555**	**+0.4%**

- As a result, industry-wide average occupancy rate in Lee County rose from 46.8% in June 2011 to 48.3% in June 2012 (+3.2%). Both the hotel/motel/resort and condo/vacation home categories saw an uptick in average occupancy rate (+2.6% and +12.8% respectively), but average occupancy rate dropped 3.4% for the RV park/campground category.
- Overall average daily rate improved from last June as well (+2.3%) driven by gains in ADR for hotels/motels/resorts (+4.5%) and RV parks/campgrounds (+3.5%). Only condos/vacation homes faced some falloff in ADR (-3.7%).
- The increases in both average occupancy rate and ADR fostered positive RevPAR performance year-over-year – an estimated 5.6% increase. Hotels/motels/resorts and condos/vacation homes experienced growth in RevPAR while RV parks/campgrounds saw no change.

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
Property Managers Responding	99	103		101	108		99/101	103/108	
Hotel/Motel/Resort/B&B	54.5%	55.8%	+2.6%	$119.69	$125.12	+4.5%	$65.16	$69.88	+7.2%
Condo/Cottage/Vacation Home	49.3%	55.6%	+12.8%	$139.64	$134.54	-3.7%	$68.88	$74.85	+8.7%
RV Park/Campground	26.4%	25.5%	-3.4%	$37.35	$38.67	+3.5%	$9.87	$9.85	-0.2%
AVERAGE	**46.8%**	**48.3%**	**+3.2%**	**$113.73**	**$116.34**	**+2.3%**	**$53.20**	**$56.20**	**+5.6%**

Lodging Industry Assessments (cont'd)

- Lee County property managers' optimism about projected reservations in the coming months appeared to be somewhat weaker than reported in June 2011. One-third of managers responding noted that their total level of reservations for the next three months (July, August, and September) are up over the same period the prior year (36%) – 45% claimed the same in June 2011. Another third said reservations for the next three months of 2012 are at least the same as the same time last year (33% vs. 33% June 2011), and slightly more than one-quarter claimed that their reservations are down for the next three months (29% vs. 17% June 2011).

June 2012 Lee County Snapshot

Total June Visitation

	%		Visitor Estimates	
	2011	2012	2011	2012
Paid Accommodations	68%	55%	227,638	233,907
Friends/Relatives	32%	45%	107,162	189,068
Total Visitation			334,800	422,975

Total Visitor Expenditures

	2011	2012	% Change
Total Visitor Expenditures	$174,760,362	$193,211,463	+10.6%
Paid Accommodations	$100,955,361	$106,047,942	+5.0%

Visitor Origin - Visitors Staying in Paid Accommodations

	%		Visitor Estimates	
	2011	2012	2011	2012
Florida	31%	17%	56,406	32,714
United States	81%	82%	183,319	191,378
UK	5%	4%	12,087	9,814
Germany	3%	3%	6,043	8,179
Canada	4%	2%	8,058	4,907
Other International	4%	8%	10,072	19,629
No Answer	4%	1%	8,058	1,636

Average Per Person Per Day Expenditures

2011	2012	% Change
$111.06	$118.76	+6.9%

First-Time/Repeat Visitors to Lee County

	2011	2012
First-time	25%	24%
Repeat	72%	76%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
Property Managers Responding	**99**	**103**		**101**	**108**		**99/101**	**103/108**	
Hotel/Motel/Resort/B&B	54.4%	55.8%	+2.6%	$119.69	$125.12	+4.5%	$65.16	$69.88	+7.2%
Condo/Cottage/Vacation Home	49.3%	55.6%	+12.8%	$139.64	$134.54	-3.7%	$68.88	$74.85	+8.7%
RV Park/Campground	26.4%	25.5%	-3.4%	$37.35	$38.67	+3.5%	$9.87	$9.85	-0.2%
AVERAGE	**49.8%**	**48.3%**	**+3.2%**	**$113.73**	**$116.34**	**+2.3%**	**$53.20**	**$56.20**	**+5.6%**

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Calendar YTD 2012 Lee County Snapshot

Total Calendar Year Visitation

	%		Visitor Estimates	
	2011	2012	2011	2012
Paid Accommodations	52%	49%	1,373,161	1,315,684
Friends/Relatives	48%	51%	1,293,096	1,390,842
Total Visitation			2,666,257	2,706,526

Total Visitor Expenditures

	2011	2012	% Change
Total Visitor Expenditures	$1,747,102,850	$1,708,618,051	-2.2%
Paid Accommodations	$1,117,300,588	$1,112,030,640	-0.5%

Visitor Origin - Visitors Staying in Paid Accommodations

	%		Visitor Estimates	
	2011	2012	2011	2012
Florida	7%	6%	82,877	67,550
United States	85%	83%	1,168,406	1,093,077
Germany	2%	5%	24,376	62,944
Canada	7%	4%	91,002	50,662
UK	2%	2%	27,626	29,169
Other International	3%	6%	43,876	79,831
No Answer	1%	0%	17,875	-

Average Per Person Per Day Expenditures

2011	2012	% Change
$116.96	$121.18	+3.6%

First-Time/Repeat Visitors to Lee County

	2011	2012
First-time	24%	23%
Repeat	75%	76%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
Hotel/Motel/Resort/B&B	64.6%	67.1%	+3.8%	$147.99	$152.76	+3.2%	$95.58	$102.43	+7.2%
Condo/Cottage/Vacation Home	65.8%	68.5%	+4.1%	$188.81	$194.93	+3.2%	$124.30	$133.53	+7.4%
RV Park/Campground	64.3%	61.5%	-4.3%	$48.77	$52.20	+7.0%	$31.37	$32.12	+2.4%
AVERAGE	**64.8%**	**66.1%**	**+1.9%**	**$134.25**	**$140.37**	**+4.6%**	**$87.00**	**$92.73**	**+6.6%**

Visitor Profile Analysis
June 2012

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

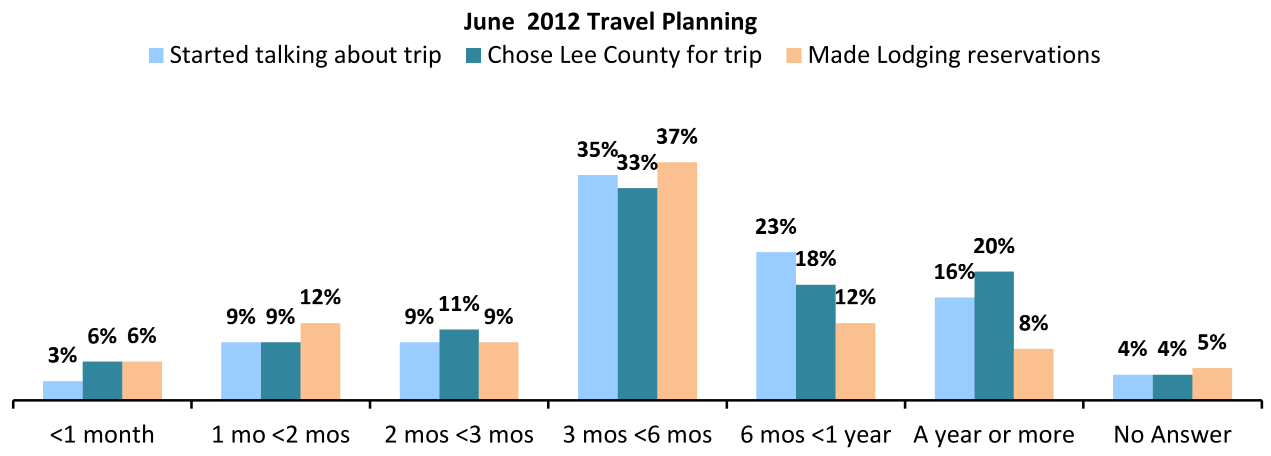
A total of 203 *interviews were conducted with visitors in Lee County during the month of July 2011. A total sample of this size is considered accurate to plus or minus 6.8 percentage points at the 95% confidence level.*

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

Travel Planning

	Started Talking About Trip		Chose Lee County for Trip		Made Lodging Reservations	
	2011	2012	2011	2012	2011	2012
	A	B	A	B	A	B
Total Respondents	**203**	**200**	**203**	**200**	**203**	**200**
Less than 3 months (NET)	30%B	21%	34%	25%	35%	28%
<1 month	12%B	3%	13%B	6%	15%B	6%
1 month - <2 months	9%	9%	10%	9%	11%	12%
2 months - <3 months	10%	9%	11%	11%	9%	9%
3 months or more (NET)	66%	75%A	60%	71%A	47%	57%
3 months - <6 months	38%	35%	33%	33%	30%	37%
6 months - <1 year	15%	23%A	13%	18%	9%	12%
A year or more	12%	16%	14%	20%	8%	8%
No Lodging Reservations Made	N/A	N/A	N/A	N/A	N/A	11%
No Answer	4%	4%	6%	4%	18%B	5%

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	**200**
Any (NET)	*96%*
Laptop computer	66%
Desktop computer	55%
Smartphone (iPhone, Blackberry, etc.)	41%
Tablet (iPad, etc.)	18%
E-Reader (Nook, Kindle, etc.)	4%
Other portable device	1%
None of these	4%
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 who use devices for destination planning (2012) or who have access to a computer (2011)	**178**	**192**
Visited web sites (net)	80%	88%A
Airline websites	24%	39%A
Hotel websites	21%	30%A
Search Engines	27%	29%
Booking websites	25%	25%
www.FortMyers-Sanibel.com	12%	17%
Trip Advisor	9%	16%A
Visit Florida	10%B	4%
AAA	10%B	4%
Facebook	N/A	4%
Other	15%	18%
None/Didn't visit websites	18%	11%
No Answer	2%	1%

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.

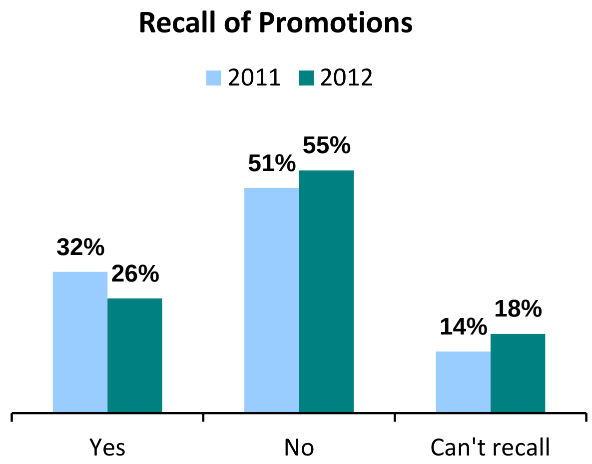
Travel Planning

Travel Information Requested	2011	2012
	A	B
Total Respondents	**203**	**200**
Requested information (NET)	39%	31%
Hotel Web Site	11%	17%
Call hotel	4%	8%
VCB website	8%	4%
Visitor Guide	7%	4%
Other	18%	9%
None/Did not request information	48%	65%A
No Answer	13%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	**203**	**200**
Yes	32%	26%
No	51%	55%
Can't Recall	14%	18%

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

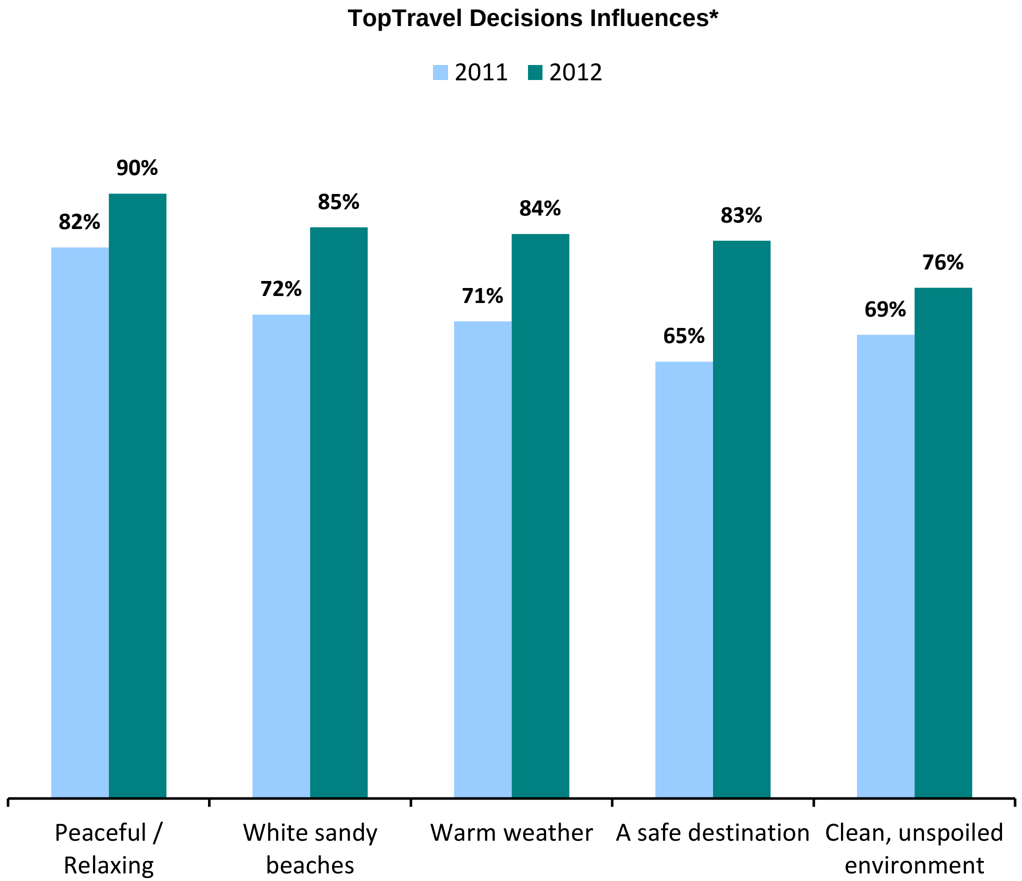


Travel Planning

Travel Decision Influences*		
	2011	2012
	A	B
Total Respondents	**203**	**200**
Peaceful / Relaxing	82%	90%A
White sandy beaches	72%	85%A
Warm weather	71%	84%A
A safe destination	65%	83%A
Clean, unspoiled environment	69%	76%
Good value for the money	68%	74%
A "family" atmosphere	60%	72%A
Upscale accommodations	44%	70%A
Convenient location	74%	69%
Reasonably priced lodging	56%	69%A
Plenty to see and do	63%	62%
Affordable dining	58%	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)*



Trip Profile

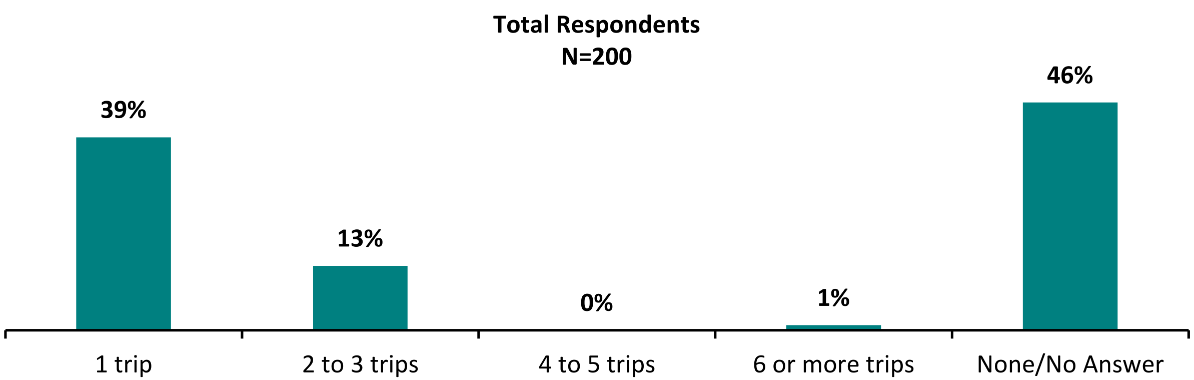
Mode of Transportation	2011	2012
	A	B
Total Respondents	**203**	**200**
Fly	58%	65%
Drive a personal vehicle	38%	31%
Drive a rental vehicle	3%	2%
Drive an RV	1%	1%
Other/No Answer (NET)	1%	1%

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

Airport Used	2011	2012
	A	B
Total Respondents	**117**	**130**
SW Florida Int'l (Fort Myers)	79%	82%
Orlando Int'l	4%	6%
Tampa Int'l	2%	4%
Ft. Lauderdale Int'l	4%	3%
Miami Int'l	2%	1%
West Palm Beach Intl	1%	-
Other/No Answer (NET)	8%	2%

Q2: At which Florida airport did you land?

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

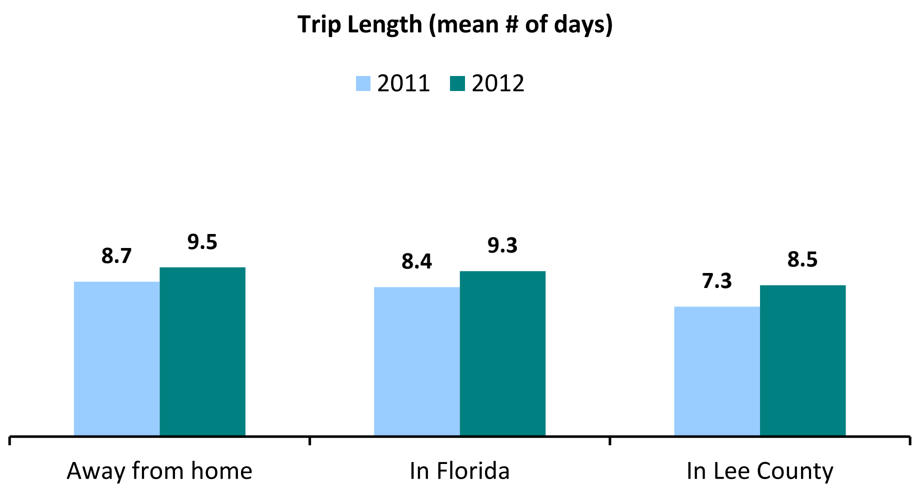


Q40. In the past year, how many trips have you taken where you used Southwest Florida International airport (Fort Myers) for your air travel?
Note: New question added in January 2012.

Trip Profile

Trip Length Mean # of Days			
	2011	2012	% Change
	A	B	
Total Respondents	**203**	**200**	
Away from home	8.7	9.5	+9.2%
In Florida	8.4	9.3	+10.7%
In Lee County	7.3	8.5	+16.4%

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

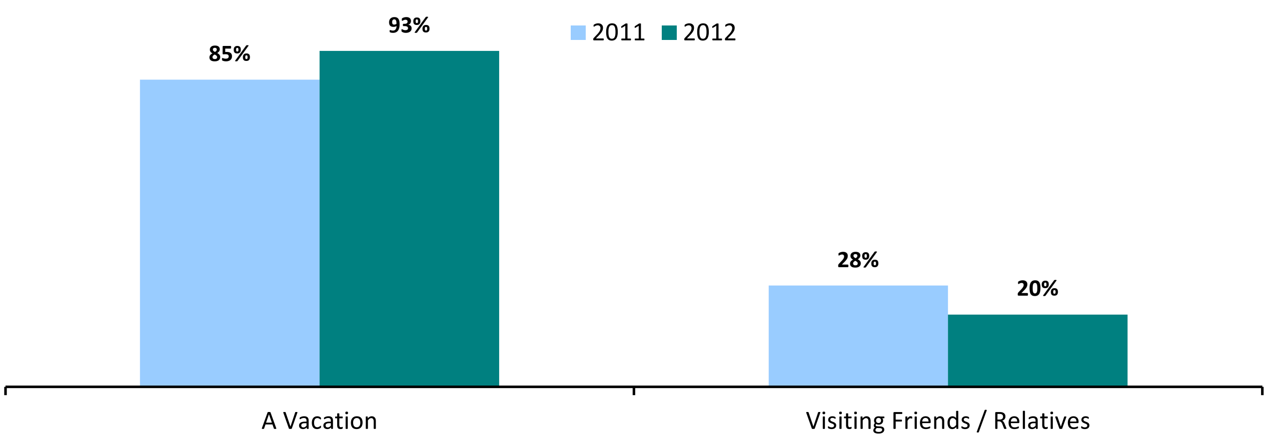


Trip Profile

Reason(s) for Visit		
	2011	2012
	A	B
Total Respondents	**203**	**200**
A Vacation	85%	93%A
Visiting Friends / Relatives	28%	20%
Other Business Trip	1%	2%
Personal Business	3%	1%
Convention/Trade Show	-	1%
Sporting Event(s)	2%	-
Other/No Answer	4%	1%

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

Reason for June Visit



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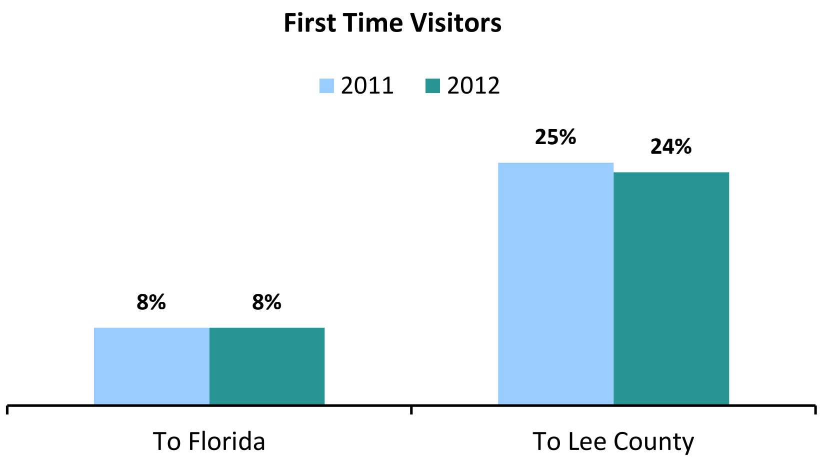
Trip Profile

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	**203**	**200**	**36***	**29****	**114**	**131**	**22****	**33***
First-time Visitor	25%	24%	9%	N/A	24%	20%	N/A	49%
No	72%	76%	91%	N/A	72%	80%	N/A	51%
No Answer	3%	<1%	-	N/A	4%	1%	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	**203**	**200**
	A	B
Yes, first-time visitor	8%	8%
No	71%	77%
No answer	4%B	1%
*FL Residents**	*18%*	*14%*

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 .*



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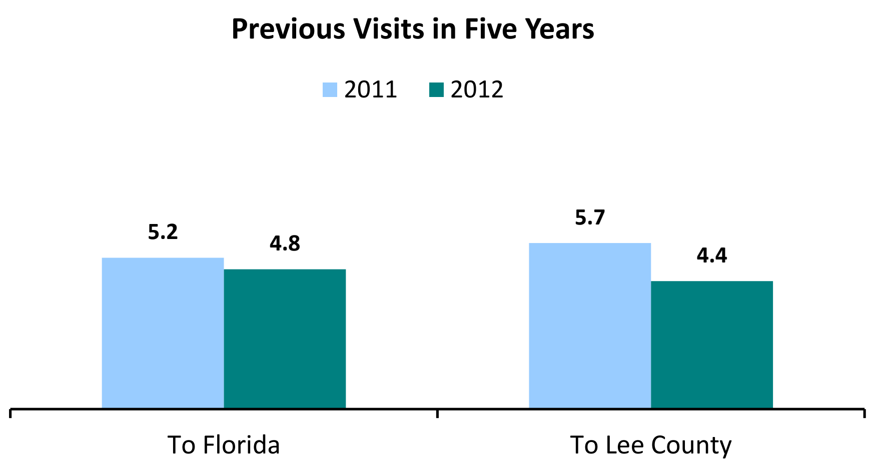
Trip Profile

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	144(FL res. Excl)	153(FL res. Excl)	146	151
Number of visits	5.2	4.8	5.7	4.4

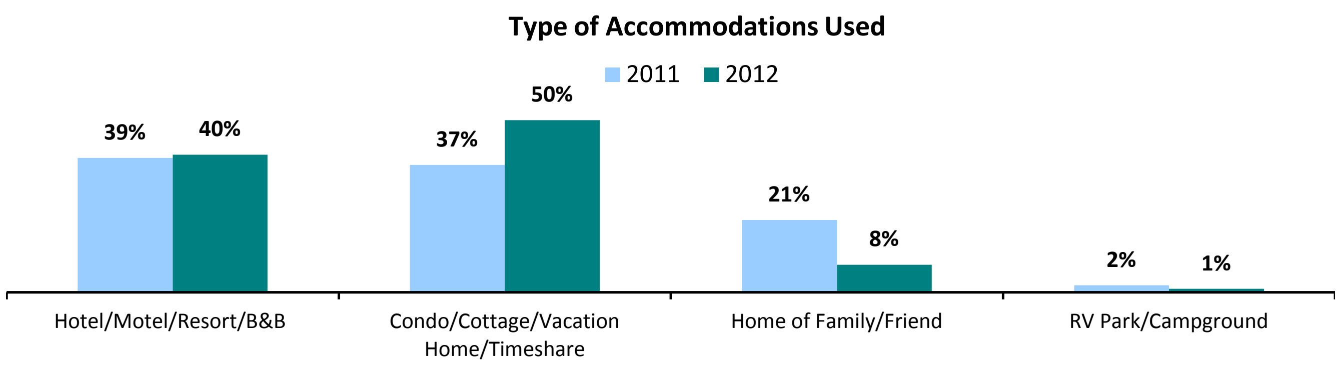
Q14: Over the past five (5) years, how many times have you visited Florida?
Q16: Over the past five (5) years, how many times have you visited Lee County?



Trip Profile

Type of Accommodations Used	2011	2012
	A	B
Total Respondents	**203**	**200**
Hotel/Motel/Resort/B&B (NET)	**39%**	**40%**
Hotel/motel/historic inn	24%	17%
Resort	14%	23%A
Bed and Breakfast	-	-
Condo/Cottage/Vacation Home/Timeshare (NET)	**37%**	**50%A**
Rented home/condo	15%	30%A
Owned home/condo	14%	12%
Borrowed home/condo	7%	7%
At the home of family or a friend	**21%B**	**8%**
RV Park/Campground (NET)	**2%**	**1%**
Daytripper (No Accommodations)	**2%**	**1%**

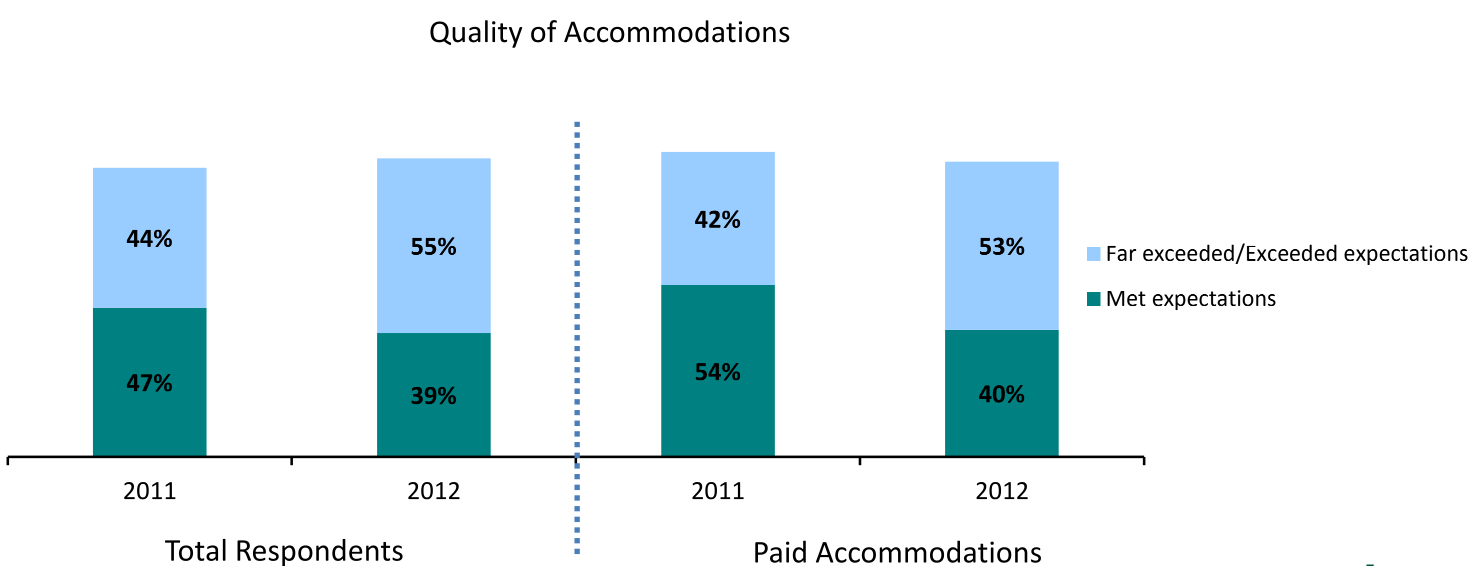
Q20: Are you staying overnight (either last night or tonight):



Trip Profile

Quality of Accommodations				
	Total Respondents		Paid Accommodations	
	2011	2012	2011	2012
	A	B	A	B
Respondents	**203**	**200**	**113**	**143**
Far exceeded/Exceeded expectations	44%	55%A	42%	53%
Met your expectations	47%	39%	54%B	40%
Did not meet/Far below expectations	2%	2%	1%	3%
No Answer	6%	4%	3%	4%

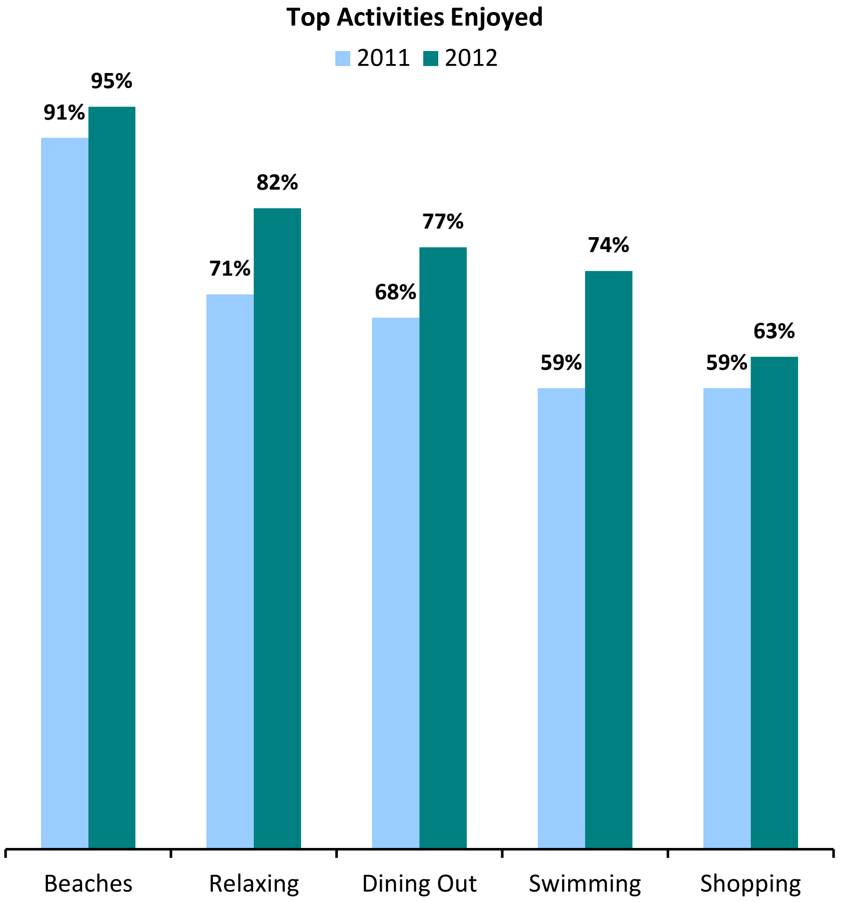
Q21: How would you describe the quality of your accommodations? Do you feel they:



Trip Activities

Activities Enjoyed		
	2011	2012
	A	B
Total Respondents	**203**	**200**
Beaches	91%	95%
Relaxing	71%	82%A
Dining Out	68%	77%A
Swimming	59%	74%A
Shopping	59%	63%
Shelling	28%	47%A
Sightseeing	41%	38%
Attractions	26%	30%
Photography	19%	22%
Visiting Friends/Relatives	27%	21%
Fishing	17%	19%
Watching Wildlife	17%	16%
Bars / Nightlife	16%	14%
Exercise / Working Out	14%	13%
Bicycle Riding	9%	13%
Birdwatching	12%	12%
Miniature Golf	14%	11%
Parasailing / Jet Skiing	11%	9%
Golfing	7%	9%
Boating	7%	7%
Kayaking / Canoeing	5%	5%
Tennis	2%	5%
Guided Tour	6%	4%
Sporting Events	7%B	3%
Scuba Diving / Snorkeling	3%	3%
Cultural Events	8%B	2%
Other	4%	2%
No Answer	2%	1%

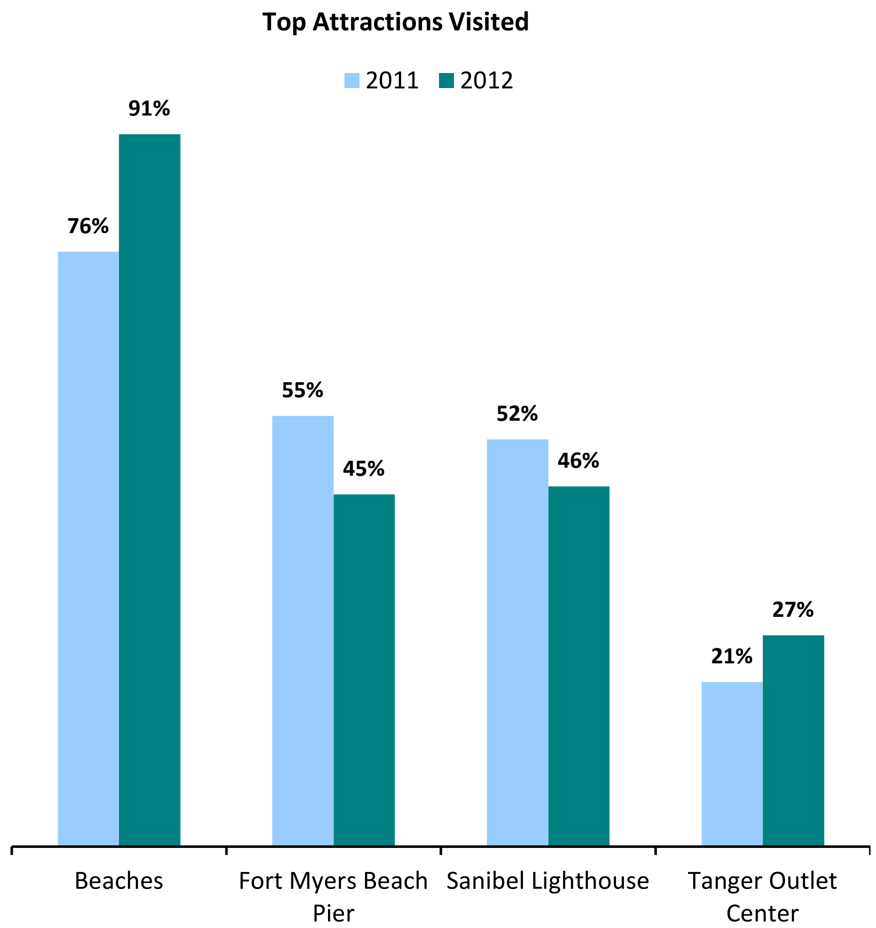
Q23: What activities or interests are you enjoying while in Lee County?
(Please mark ALL that apply.)



Trip Activities

Attractions Visited		
	2011	2012
	A	B
Total Respondents	**203**	**200**
Beaches	76%	91%A
Fort Myers Beach Pier	55%B	45%
Sanibel Lighthouse	21%	27%
Tanger Outlet Center	26%	27%
Periwinkle Place	5%	19%A
Edison / Ford Estates	27%B	17%
Ding Darling National Wildlife Refuge	7%	17%A
Miromar Outlets Mall	17%	15%
Shell Factory and Nature Park	9%	14%
Bell Tower Shops	10%	11%
Edison Mall	14%	10%
Coconut Point Mall	13%	9%
Gulf Coast Town Center	9%	9%
Bailey-Matthews Shell Museum	3%	5%
Broadway Palm Dinner Theater	4%	3%
Manatee Park	6%B	2%
Babcock Wilderness Adventures	-	1%
Barbara B. Mann Perfoming Arts Hall	1%	<1%
Other	5%	4%
None/No Answer	9%B	3%

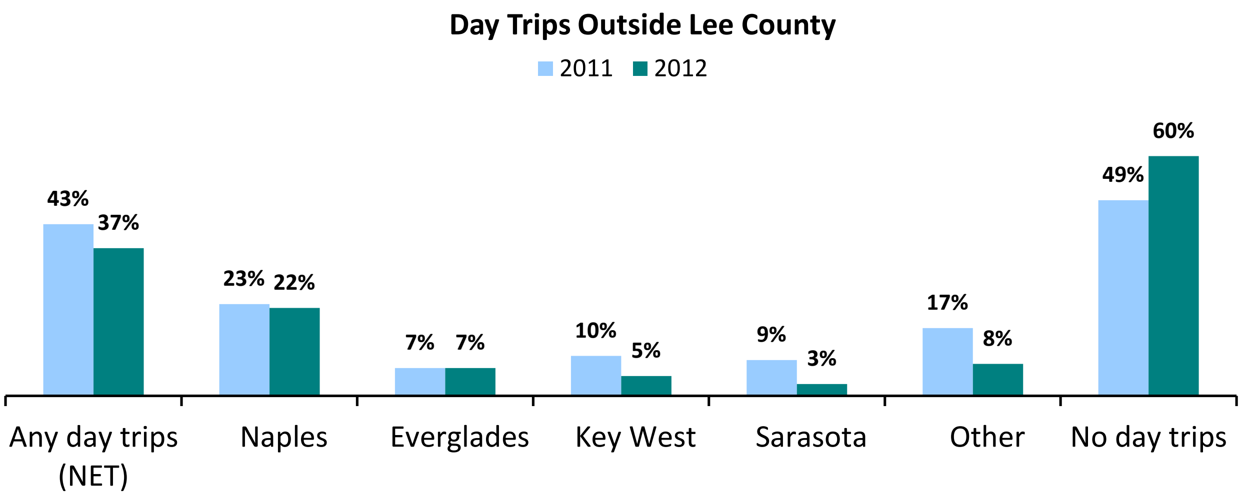
Q24. On this trip, which attractions are you visiting? *(Please mark ALL that apply.)*



Trip Activities

Day Trips Outside Lee County		
	2011	2012
	A	B
Total Respondents	**203**	**200**
Any day trips (NET)	43%	37%
Naples	*23%*	*22%*
Everglades	*7%*	*7%*
Key West	*10%A*	*5%*
Sarasota	*9%A*	*3%*
Other	*17%A*	*8%*
No day trips	49%	60%A
No Answer	18%A	9%

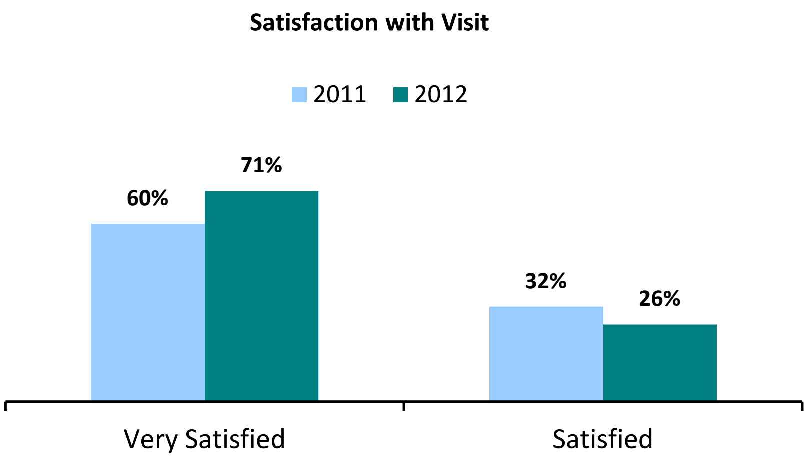
Q25: Where did you go on day trips outside Lee County?



Lee County Experience

Satisfaction with Visit		
	2011	**2012**
	A	**B**
Total Respondents	**203**	**200**
Satisfied	92%	97%B
Very Satisfied	*60%*	*71%B*
Satisfied	*32%*	*26%*
Neither	1%	-
Dissatisfied/Very Dissatisfied	1%	<1%
Don't know/no answer	6%	3%

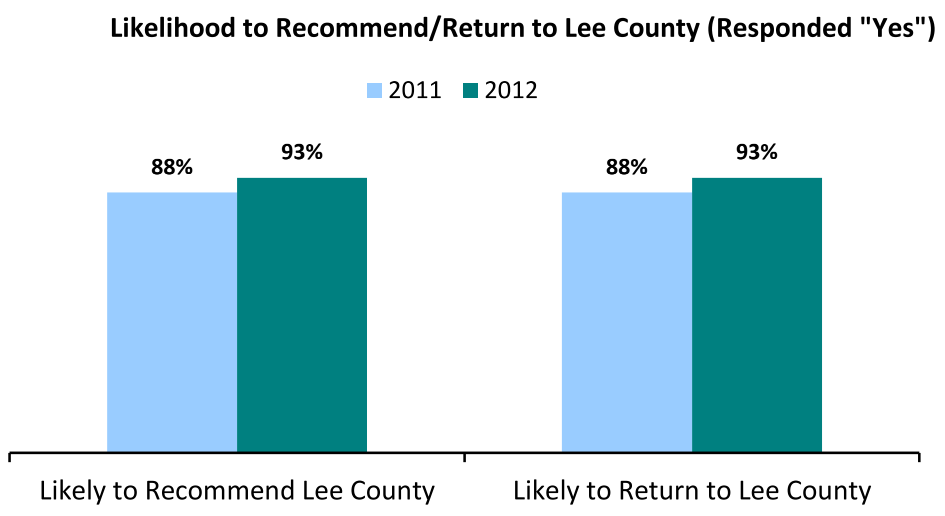
Q28: How satisfied are you with your stay in Lee County?



Future Plans

Likelihood to Recommend/Return to Lee County		
	2011	2012
	A	B
Total Respondents	**203**	**200**
Likely to Recommend Lee County	88%	93%
Likely to Return to Lee County	88%	93%
Base: Total Respondents Planning to Return	**179**	**186**
Likely to Return Next Year	59%	59%

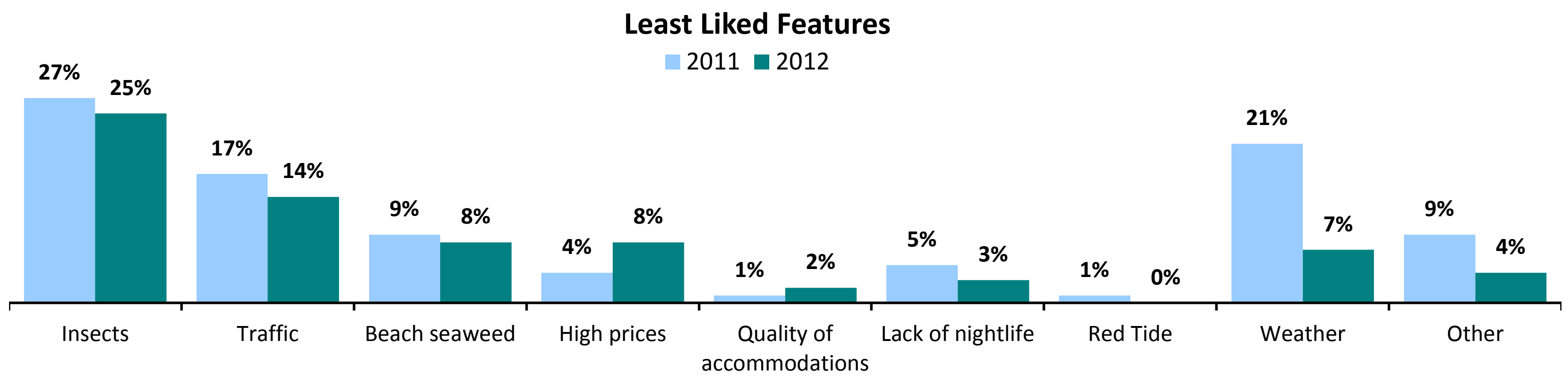
Q27: Would you recommend Lee County to a friend over other vacation areas in Florida?
Q31: Will you come back to Lee County?
Q32: Will you come back next year?



Trip Activities

Least Liked Features		
	2011	2012
	A	B
Total Respondents	**203**	**200**
Insects	27%	25%
Traffic	17%	14%
Beach seaweed	9%	8%
High prices	4%	8%
Weather	21%B	7%
Lack of nightlife	5%	3%
Quality of accommodations	1%	2%
Red Tide	1%	<1%
Other	9%B	4%
Nothing/No Answer (NET)	32%	45%A

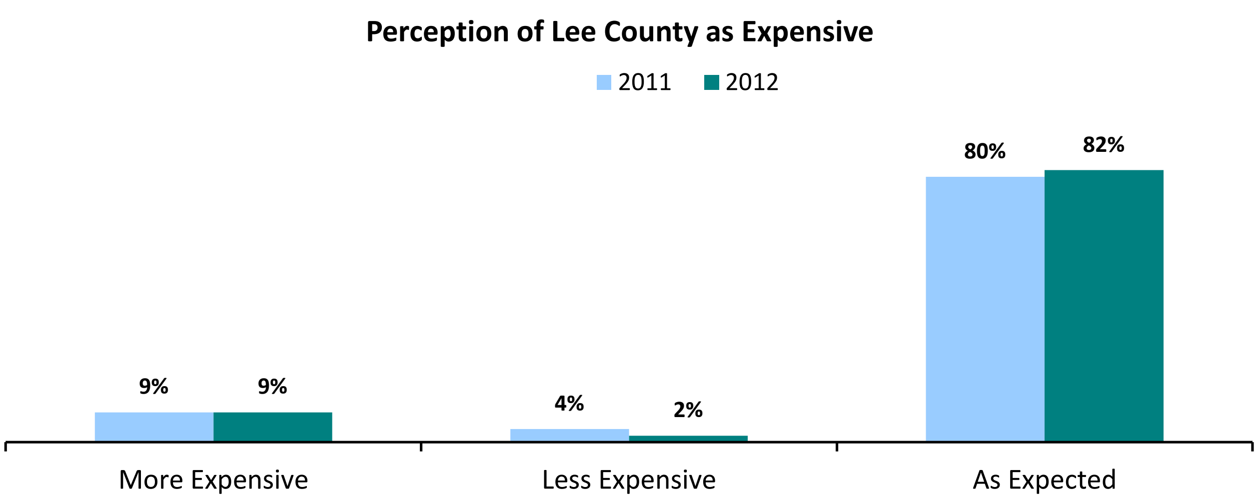
Q29: During the specific visit, which features have you liked **LEAST** about our area? (*Please mark ALL that apply.)*



Trip Activities

Perception of Lee County as Expensive		
	2011	2012
	A	B
Total Respondents	**203**	**200**
More Expensive	9%	9%
Less Expensive	4%	2%
As Expected	80%	82%
Don't know/No Answer (NET)	7%	6%

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



Visitor and Travel Party Demographic Profile

Visitor Demographic Profile

	2011	2012
	A	B
Total Respondents	**203**	**200**
Age of respondent (mean)	47.5	49.9
Annual household income (mean)	$90,209	$101,483A
Martial Status		
Married	66%	75%
Single	17%	11%
Vacations per year (mean)	2.6	2.4
Short getaways per year (mean)	3.5	3.6

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	**203**	**200**
Family	48%	53%
Couple	29%	25%
Group of couples/friends	12%	17%
Single	5%	4%
Mean travel party size	3.6	3.7
Mean adults in travel party	2.9	2.9

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	**203**	**200**
Traveling with any Children (net)	37%	40%
Any younger than 6	13%	17%
Any ages 6-11	18%	18%
Any 12-17 years old	19%	22%
No Children	63%	60%

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 June Visitation

	%		Visitor Estimates		
	2011	2012	2011	2012	% Change
Paid Accommodations	68%	55%	227,638	233,907	+2.8%
Friends/Relatives	32%	45%	107,162	189,068	+76.4%
Total Visitation			*334,800*	*422,975*	*+26.4%*

Paid Accommodations Visitors

	%		Visitor Estimates		
Country of Origin	**2011**	**2012**	**2011**	**2012**	**% Change**
United States	81%	82%	183,319	191,378	4.4%
UK	5%	4%	12,087	9,814	-18.8%
Germany	3%	3%	6,043	8,179	35.3%
Canada	4%	2%	8,058	4,907	-39.1%
France	0%	2%	-	4,907	-
Scandinavia	3%	1%	6,043	3,271	-45.9%
BeNeLux	-	1%	-	3,271	-
Switzerland	1%	1%	2,014	1,636	-18.8%
Austria	1%	1%	2,014	1,636	-18.8%
Other Europe	-	1%	-	3,271	-
No Answer	4%	1%	8,058	1,636	-79.7%
U.S. Region of Origin	**2011**	**2012**	**2011**	**2012**	**% Change**
Florida	31%	17%	56,406	32,714	-42.0%
South (including Florida)	44%	37%	80,580	70,336	-12.7%
Midwest	29%	37%	52,377	70,336	34.3%
Northeast	10%	19%	18,130	35,986	98.5%
West	4%	3%	8,058	6,543	-18.8%
No Answer	13%	4%	24,174	8,179	-66.2%

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

2012 Top DMAs (Paid Accommodations)

Columbus, OH	6%	11,450
Indianapolis	6%	11,450
Philadelphia	5%	9,814
Tampa-Saint Petersburg	5%	9,814
Cincinnati	4%	8,179
Detroit	4%	8,179
Miami-Fort Lauderdale	4%	8,179
New York	4%	8,179
West Palm Beach-Fort Pierce	4%	8,179
Atlanta	3%	6,543
Buffalo	3%	6,543
Chicago	3%	6,543
Pittsburgh	3%	6,543
Lexington	3%	4,907
Orlando-Daytona Beach-Melbourne	3%	4,907

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

Occupancy Data Analysis
June 2012

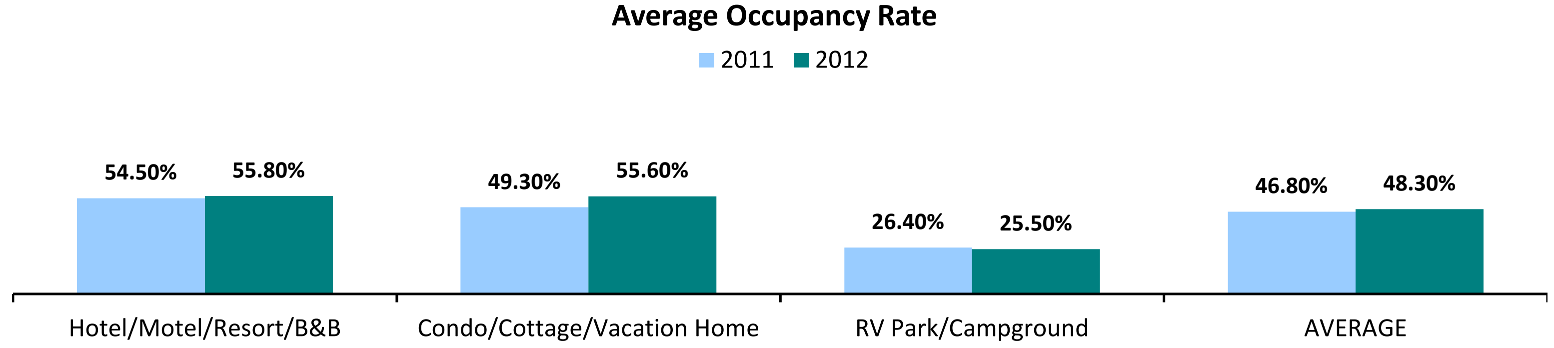
Property managers representing 112 properties in Lee County were interviewed for the June 2012 Occupancy Survey between July 1 and July 15, 2012, a sample considered accurate to plus or minus 9.3 percentage points at the 95% confidence level.

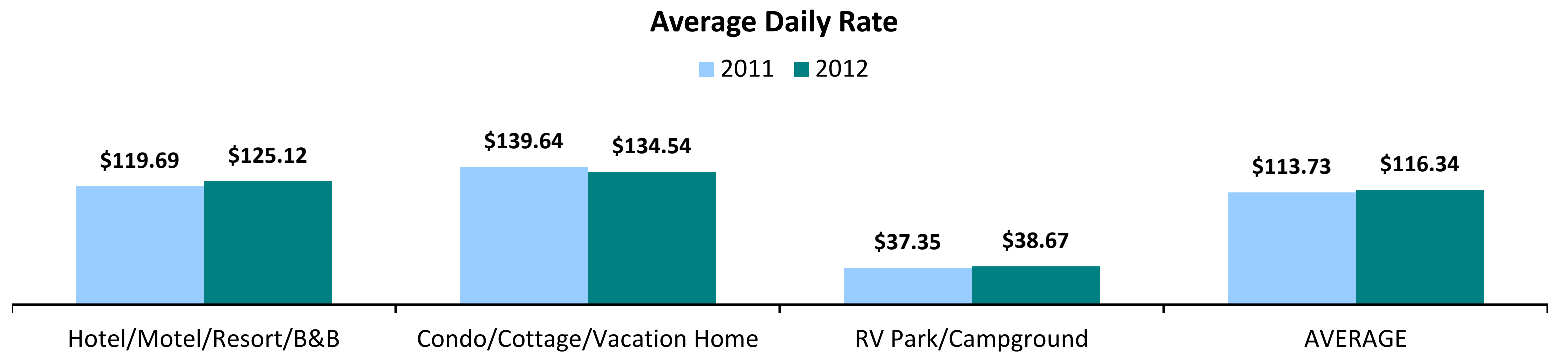
Property managers representing 107 properties in Lee County were interviewed for the June 2011 Occupancy Survey between July 1 and July 15, 2011, a sample considered accurate to plus or minus 9.3 percentage points at the 95% confidence level.

June Occupancy/Daily Rates

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
Property Managers Responding	**99**	**103**		**101**	**108**		**99/101**	**103/108**	
Hotel/Motel/Resort/B&B	54.4%	55.8%	+2.6%	$119.69	$125.12	+4.5%	$65.16	$69.88	+7.2%
Condo/Cottage/Vacation Home	49.3%	55.6%	+12.8%	$139.64	$134.54	-3.7%	$68.88	$74.85	+8.7%
RV Park/Campground	26.4%	25.5%	-3.4%	$37.35	$38.67	+3.5%	$9.87	$9.85	-0.2%
AVERAGE	**46.8%**	**48.3%**	**+3.2%**	**$113.73**	**$116.34**	**+2.3%**	**$53.20**	**$56.20**	**+5.6%**

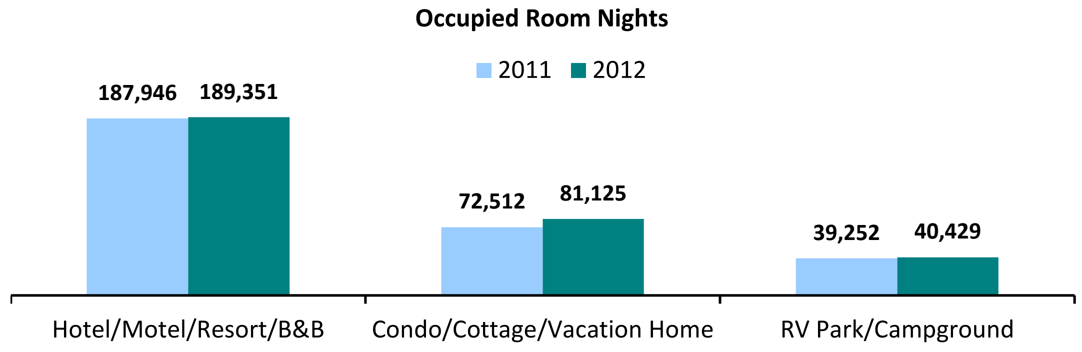
Q16: What was your overall average occupancy rate for the month of June ?
Q17: What was your average daily rate (ADR) in June?





June Room/Unit/Site Nights

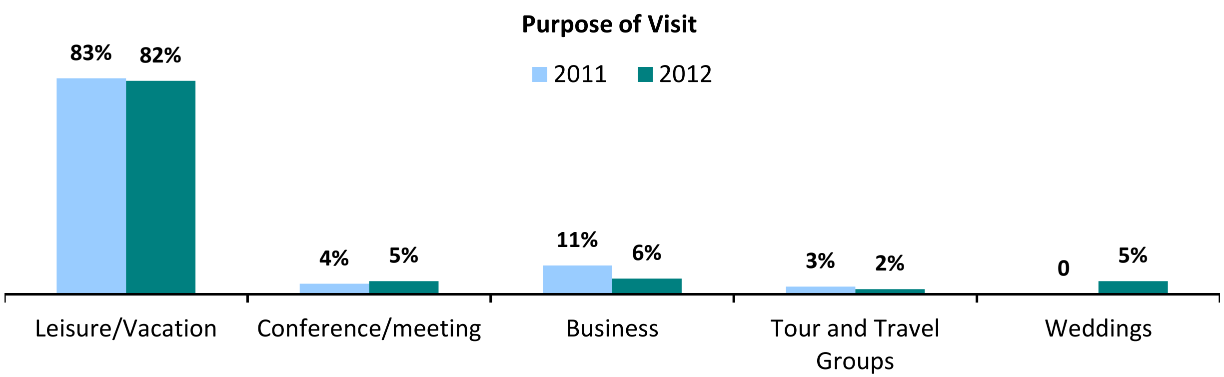
	Occupied Room Nights			Available Room Nights		
	2011	2012	% Change	2011	2012	% Change
Hotel/Motel/Resort/B&B	187,946	189,351	+0.7%	345,240	339,025	-1.8%
Condo/Cottage/Vacation Home	72,512	81,125	+11.9%	147,000	145,830	-0.8%
RV Park/Campground	39,252	40,429	+3.0%	148,500	158,700	+6.9%
Total	**299,710**	**310,905**	**+3.7%**	**640,740**	**643,555**	**+0.4%**



Lodging Management Estimates

Guest Profile	2011	2012
	A	B
Property Managers Responding	**90**	**99**
Purpose of Visit		
Leisure/Vacation	83%	82%
Conference/meeting	4%	5%
Business	11%	6%
Tour and Travel Groups	3%	2%
Weddings/Social groups/Reunions (net)	-	5%
Property Managers Responding	**99**	**105**
Average guests per room	2.8	2.7
Property Managers Responding	**96**	**104**
Average length of stay in nights	5.2	4.4

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

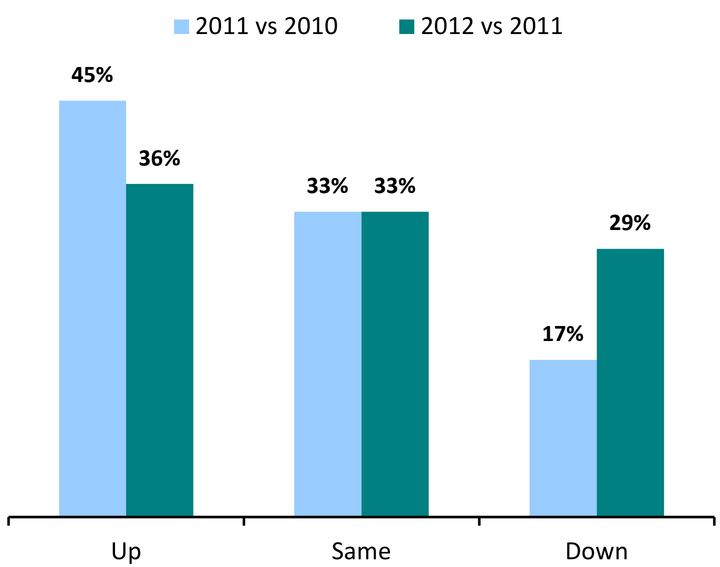


Occupancy Barometer

Level of Reservations for Next 3 Months Compared to Last Year		
	2011	**2012**
	A	**B**
Total Respondents	**99**	**108**
Up/Same (net)	79%	69%
Up	45%	36%
Same	33%	33%
Down	17%	29%A

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

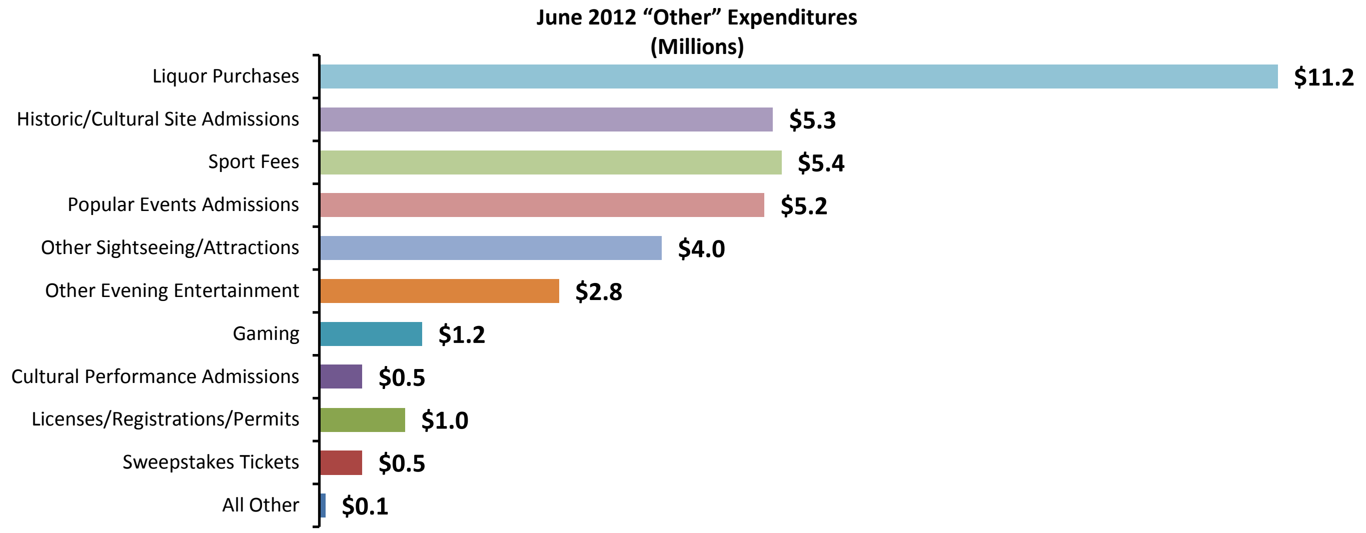
Level of Reservations for Next 3 Months



Economic Impact Analysis
June 2012

Total Visitor Expenditures by Spending Category

TOTAL EXPENDITURES			
	2011	2012	% Change
TOTAL	$174,760,362	$193,211,463	+10.6%
Food and Beverages	$49,260,980	$51,209,033	+4.0%
Shopping	$41,639,543	$51,015,635	+22.5%
Lodging Accommodations	$34,086,758	$36,170,318	+6.1%
Ground Transportation	$18,444,149	$17,663,131	-4.2%
Other	$31,328,932	$37,153,346	+18.6%



Total Visitor Expenditures by Lodging Type

TOTAL EXPENDITURES						
	Staying Paid Accommodations			Visiting Friends and Relatives/Day Trippers		
	2011	2012	% Change	2011	2012	% Change
TOTAL	$100,955,361	$106,047,942	+5.0%	$73,805,001	$87,163,521	+18.1%
Lodging Accommodations	$34,086,758	$36,170,318	+6.1%	-	-	-
Food and Beverages	$23,259,980	$23,958,640	+3.0%	$26,001,000	$27,250,393	+4.8%
Shopping	$20,012,612	$21,625,110	+8.1%	$21,626,931	$29,390,525	+35.9%
Ground Transportation	$7,691,079	$8,381,995	+9.0%	$10,753,070	$9,281,136	-13.7%
Other	$15,904,932	$15,911,879	0.0%	$15,424,000	$21,241,467	+37.7%

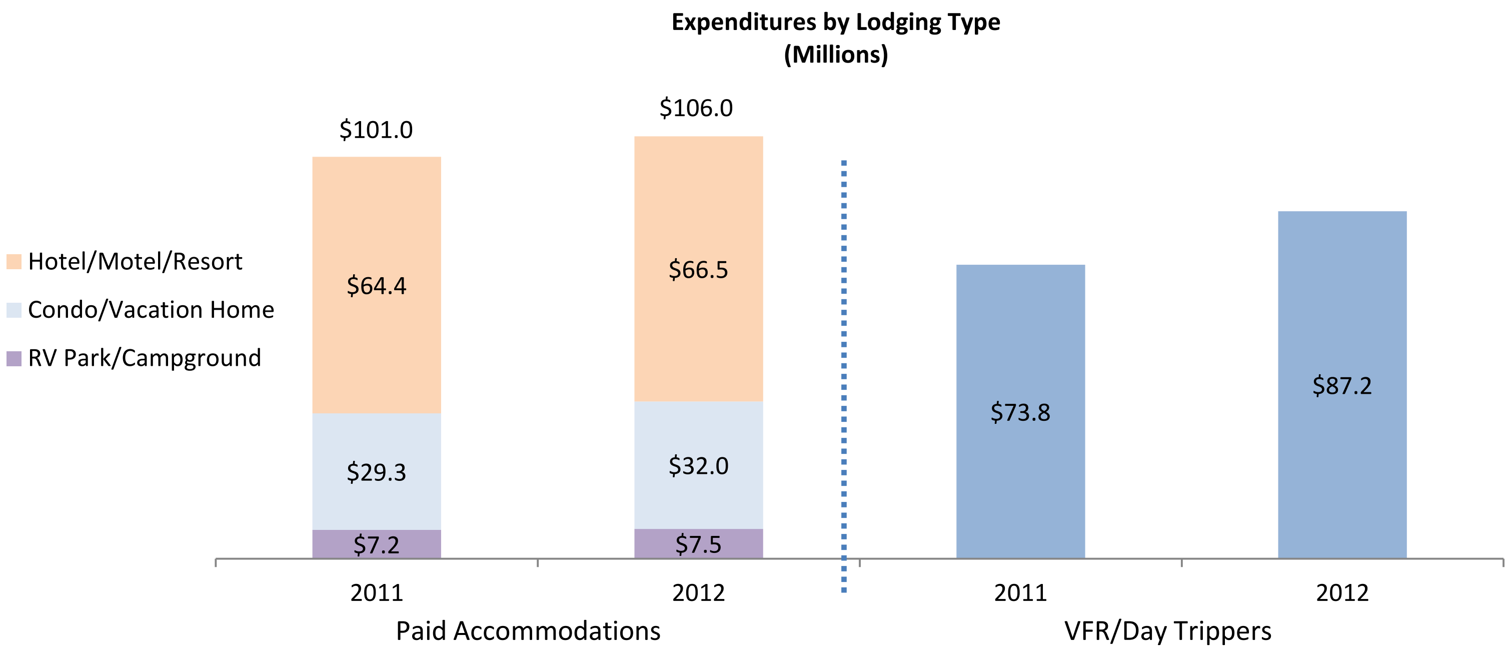
"Other " includes the following categories:

- 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

the beaches of FORT MYERS SANIBEL

Total Visitor Expenditures by Lodging Type

Total Expenditures by Lodging Type					
	2011	2012	% Change	2011	2012
TOTAL	$174,760,362	$193,211,463	+10.6%	100%	100%
Visiting Friends & Relatives/Day Trippers	$73,805,001	$87,163,521	+18.1%	42%	45%
Paid Accommodations	$100,955,361	$106,047,942	+5.0%	58%	55%
Hotel/Motel/Resort/B&B	$64,436,872	$66,475,586	+3.2%	37%	34%
Condo/Cottage/Vacation Home	$29,314,146	$32,022,985	+9.2%	17%	17%
RV Park/Campground	$7,204,343	$7,549,371	+4.8%	4%	4%



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Appendix

June 2012

June 2012 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Fort Myers	RSW Airport	6/2/2012	25
Sanibel	Pointe Santo	6/11/2012	10
Sanibel	Tarpon Beach	6/11/2012	8
Sanibel	Ocean's Reach	6/11/2012	8
Fort Myers Beach	Diamond Head Resort	6/14/2012	6
Fort Myers Beach	Estero Beach Club	6/14/2012	7
Fort Myers Beach	Neptune Inn	6/14/2012	4
Bonita Springs	Bonita Beach	6/16/2012	25
Cape Coral	Cape Coral Yacht Club	6/17/2012	6
Sanibel	Lighthouse Beach	6/19/2012	24
Fort Myers	Centennial Park	6/23/2012	10
Fort Myers	Clarion	6/23/2012	4
North Fort Myers	Shell Factory	6/23/2012	8
Fort Myers	Edison Estates	6/26/2012	25
Fort Myers Beach	Best Western	6/29/2012	6
Fort Myers Beach	Pink Shell Resort	6/29/2012	6
Fort Myers Beach	Times Square	6/29/2012	18
TOTAL			**200**

Occupancy Interviewing Statistics

Interviews were conducted from July 1 – July 15, 2012. Information was provided by 112 Lee County lodging properties.

Lodging Type	Number of Interviews
Hotel/Motel/Resort/B&Bs	71
Condo/Cottage/Vacation Home/Timeshare	29
RV Park/Campground	12
Total	**112**