



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

**April 2011 Visitor Profile and Occupancy Analysis
June 10, 2011**

Prepared for:

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

Prepared by:





Executive Summary April 2011

Throughout this report, statistically significant differences between percentages for 2010 and 2011 using a confidence level of 95% are noted by <>.



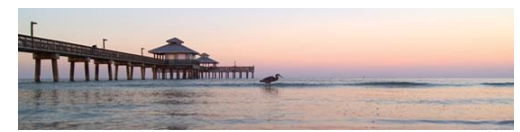
Executive Summary

Visitor Estimates

- Lee County hosted nearly 245,000 visitors staying in paid accommodations during the month of April 2011, and about 274,000 staying with friends or relatives while visiting, for an estimated total of 518,434 visitors.
- Visitation among those staying in paid accommodations increased 1.6% from April 2010 to April 2011. The increase in visitation among those staying with friends and relatives was more pronounced year-over-year (+13.1%). As a result, total visitation was up a notable 7% year-over-year. For calendar year-to-date 2011, total visitation was on par with the prior year (+0.5%).
- The majority of April 2011 visitors staying in paid accommodations were U.S. residents (90%). Canada and UK contributed the largest share of international visitors staying in paid accommodations (3% each) during April 2011.
- Three in five domestic visitors staying in paid accommodations during April 2011 were from the Midwest (60%) followed by the Northeast (23%), South (8%), and West (2%). Lee County drew the largest share of these visitors from the Chicago, Indianapolis and South Bend-Elkhart DMAs (7% each).

Visitor Expenditures

- The average per person per day expenditure was \$114.51 in April 2011 – a 3.9% decline from April 2010 (\$119.19).
- Total visitor expenditures for April 2011 are estimated at \$308 million, a 19.5% increase from \$258 million in April 2010. From April 2010 to April 2011, expenditures increased 25.8% among those staying in paid accommodations and 11.9% among those staying with friends and relatives. For the calendar year-to-date, estimated total expenditures are up 14.1%.



Total April Visitation					
	%		Visitor Estimates		% Change
	2010	2011	2010	2011	2010-2011
Paid Accommodations	50%	47%	240,698	244,576	1.6%
Friends/Relatives	50%	53%	242,155	273,858	13.1%
<i>Total Visitation</i>			482,853	518,434	7.4%
April Visitor Origin - Visitors Staying in Paid Accommodations					
	2010	2011	2010	2011	
United States	87%	90%	210,400	219,619	4.4%
Canada	4%	3%	10,099	8,319	-17.6%
UK	1%	3%	1,683	6,655	295.4%
Switzerland	-	1%	-	3,328	-
France	1%	1%	1,683	3,328	97.7%
Scandinavia	1%	1%	1,683	1,664	-1.2%
Germany	4%	1%	10,099	1,664	-83.5%
Austria	1%	-	1,683	-	-
BeNeLux	1%	-	1,683	-	-
No Answer	1%	-	1,683	-	-
U.S. Region (Paid Accommodations)					
	2010	2011	2010	2011	
Florida	2%	3%	3,366	6,655	97.7%
South (including Florida)	14%	8%	28,614	18,302	-36.0%
Midwest	58%	60%	122,874	131,439	7.0%
Northeast	21%	23%	43,763	49,913	14.1%
West	2%	2%	3,366	3,328	-1.2%
No Answer	6%	8%	11,782	16,638	41.2%

2011 Top DMAs (Paid Accommodations)		
Chicago	7%	14,974
Indianapolis	7%	14,974
South Bend-Elkhart	7%	14,974
Boston (Manchester, NH)	5%	9,983
Columbus, OH	5%	9,983
Minneapolis-Saint Paul	5%	9,983
New York	5%	9,983
Buffalo	4%	8,319
Fort Wayne	4%	8,319
Cleveland-Akron (Canton)	3%	6,655
Grand Rapids-Kalamazoo-Battle Creek	3%	6,655
Milwaukee	3%	6,655



Trip Planning

- April 2011 visitors tended to plan their travel well in advance but not quite to the same extent as April 2010 visitors. More than two-thirds said they had started talking about their Lee County trip at least three months in advance (71% vs. 80% April 2010). Somewhat fewer chose Lee County for their trip in that same timeframe (62% vs. 71% April 2010). However, when making lodging reservations, barely half of April 2011 visitors did so three months or more before their trip (46% vs. 58% April 2010).
- Most visitors claimed to have used websites when planning their Lee County trip (82%). Search engines (31%), hotel websites (29%), booking websites (27%), and airline websites (27%) were mentioned most frequently by visitors. Only 13% said they visited the VCB website.
- When deciding to visit Lee County, April 2011 visitors were most likely to say that the following attributes influenced their selection:
 - Warm weather (92%)
 - Peaceful/Relaxing (87%)
 - White sandy beaches (79%)

Visitor Profile

- Six April 2011 visitors in ten traveled to Lee County by plane (61%), with the majority saying they flew into Southwest Florida International (83%).
- Same as last April, the majority of Lee County visitors are repeat visitors (74% vs. 77% April 2010). Repeat visitors averaged four visits to Lee County in the past five years (4.0).
- About half of April 2011 visitors indicated they were staying in a hotel/motel/resort/B&B for their lodging (47%) compared with only one-third last April (29%). Slightly more than one-third said they were staying in a condo/vacation home (36%) and one in ten at the home of a friend or family member (12%). Two in five April 2011 visitors felt that the quality of accommodations *far exceeded* or *exceeded* their expectations in April 2011 (40%).
- The top activities enjoyed while in Lee County during April 2011 were *beaches* (94%), *relaxing* (80%) and *dining out* (76%). *Swimming* and *shopping* followed close behind (63% and 59%).



- In terms of attractions visited, April 2011 visitors were more likely than April 2010 visitors to go to Ft. Myers Beach Pier (51% vs. 39% April 2010) and less likely to visit the Tanger Outlet Center (16% vs. 25% April 2010), Miromar Outlets Mall (12% vs. 20% April 2010), and Ding Darling National Wildlife Refuge (9% vs. 21% April 2010).
- Overall, visitor satisfaction remains extremely high, with 95% of April 2011 visitors reporting being *very satisfied* or *satisfied* with their visit. The vast majority indicated they were likely to return to Lee County (88%), and more than half of them say they will return next year (53%).
- Slightly fewer than half of April 2011 visitors noted that *traffic* was the feature they liked least about the Lee County area (44%) – a significantly lower proportion than among April 2010 visitors (60%). Mentions of *beach seaweed* as a dislike were also less prevalent among April 2011 visitors when compared with their 2010 counterparts (6% vs. 14% April 2010).
- The demographic composition of April 2011 visitors was generally similar to that of April 2010 visitors. April 2011 visitors averaged 49 years of age with an average household income of approximately \$101,000. The majority of visitors are married (71%) and only a minority were traveling with children (39%). The average travel party size was three people (3.3 mean) – slightly smaller than last April (3.9 mean).



Lodging Property Manager Assessments

- For the Lee County lodging industry in total, the number of available room nights and occupied room nights were higher in April 2011 than in April 2010 (+1.8% and +6.6% respectively). Hotel/motel/resort available room nights were actually down 3.4% from a year ago and occupied room nights were up 3.8%. Condo/vacation home properties saw very slight declines in available and occupied room nights while RV park/campground properties saw substantial increases in both available room nights (+19.7%) and occupied room nights (+24.4%).

	Occupied Room Nights			Available Room Nights		
	2010	2011	% Change	2010	2011	% Change
Hotel/Motel/Resort/B&B	206,858	214,654	3.8%	354,870	342,780	-3.4%
Condo/Cottage/Vacation Home	95,946	94,172	-1.8%	151,830	150,390	-0.9%
RV Park/Campground	78,157	97,236	24.4%	127,330	152,400	19.7%
Total	380,961	406,062	6.6%	634,030	645,570	1.8%

- Average occupancy rates increased from 60.1% in April 2010 to an average of 62.9% in April 2011 (+4.7%). Average occupancy rate for condos/cottages was on par year-over-year (-0.9%) but increased for hotels/motels/resorts (+7.4%) and RV parks/campgrounds (+3.9%).
- Overall average daily rates rose from \$135.24 to \$140.81 year-over-year (+4.1%). ADR increased for hotel/motel/resort (+6.3%) and for condo/vacation home properties (+12.2%) but decreased for RV parks/campgrounds (-2.2%).
- The increase in both average occupancy rate and ADR generated a 9% improvement in RevPAR from April 2010 to April 2011. RevPAR growth occurred in each of the three lodging categories but most notably for hotels/motels/resorts and condos/vacation homes.

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2010	2011	% Change	2010	2011	% Change	2010	2011	% Change
Property Managers Responding	142	113		146	116		142/146	113/116	
Hotel/Motel/Resort/B&B	58.3%	62.6%	7.4%	\$147.39	\$156.71	6.3%	\$85.92	\$98.13	14.2%
Condo/Cottage/Vacation Home	63.2%	62.6%	-0.9%	\$184.60	\$207.10	12.2%	\$116.66	\$129.68	11.2%
RV Park/Campground	61.4%	63.8%	3.9%	\$42.46	\$41.51	-2.2%	\$26.06	\$26.49	1.7%
AVERAGE	60.1%	62.9%	4.7%	\$135.24	\$140.81	4.1%	\$81.26	\$88.57	9.0%



- Property managers in April 2011 continue to report optimistically when comparing their current month's occupancy and revenue year-over-year. About three-fourths said their April 2011 occupancy was the *same* or *better* than the prior year (73% vs. 64% April 2010). Similarly, about three-fourths reported their revenue was the same or better than the prior year (72% vs. 59% April 2010). Importantly, nearly half of property managers said their April 2011 occupancy and revenue were *better* than last year (46% each) – a significant improvement over reports from last April (33% and 32% respectively).
- Entering the first month of the spring season for 2011, projections for the next three months (May-July) appear largely promising. Two property managers in three reported that their total level of reservations for the next three months are the same as or higher than the same period the prior year (67% vs. 49% April 2010), while fewer than one third reported that their reservations are down (28% vs. 44% April 2010) .



April 2011 Lee County Snapshot

Total April Visitation				
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Florida	2%	3%	3,366	6,655
United States	87%	90%	210,400	219,619
Canada	4%	3%	10,099	8,319
UK	1%	3%	1,683	6,655
Switzerland	-	1%	-	3,328
France	1%	1%	1,683	3,328
Scandinavia	1%	1%	1,683	1,664
Germany	4%	1%	10,099	1,664
Austria	1%	-	1,683	-
BeNeLux	1%	-	1,683	-
No Answer	1%	-	1,683	-

Total Visitor Expenditures			
	2010	2011	% Change
Total Visitor Expenditures	\$257,804,660	\$307,953,844	19.5%
Paid Accommodations	\$140,311,336	\$176,533,512	25.8%

Average Per Person Per Day Expenditures		
2010	2011	% Change
\$119.19	\$114.51	-3.9%

First-Time/Repeat Visitors to Lee County		
	2009	2010
First-time	22%	24%
Repeat	77%	74%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2010	2011	% Change	2010	2011	% Change	2010	2011	% Change
Property Managers Responding	142	113		146	116		142/146	113/116	
Hotel/Motel/Resort/B&B	58.3%	62.6%	7.4%	\$147.39	\$156.71	6.3%	\$85.92	\$98.13	14.2%
Condo/Cottage/Vacation Home	63.2%	62.6%	-0.9%	\$184.60	\$207.10	12.2%	\$116.66	\$129.68	11.2%
RV Park/Campground	61.4%	63.8%	3.9%	\$42.46	\$41.51	-2.2%	\$26.06	\$26.49	1.7%
AVERAGE	60.1%	62.9%	4.7%	\$135.24	\$140.81	4.1%	\$81.26	\$88.57	9.0%



Total Calendar YTD Visitation				
	%		Visitor Estimates	
	2010	2011	2010	2011
Paid Accommodations	46%	49%	869,230	916,399
Friends/Relatives	54%	51%	1,007,584	969,229
<i>Total Visitation</i>			1,876,814	1,885,628
Visitor Origin - Visitors Staying in Paid Accommodations				
	%		Visitor Estimates	
	2010	2011	2010	2011
Florida	2%	2%	16,687	17,905
United States	86%	86%	750,905	791,066
Canada	7%	7%	59,162	65,108
UK	2%	2%	15,170	16,277
Scandinavia	1%	1%	6,068	8,139
Germany	2%	1%	19,721	8,139
France	<1%	1%	1,517	4,883
BeNeLux	<1%	<1%	3,034	3,255
Switzerland	-	<1%	-	3,255
Ireland	<1%	<1%	1,517	1,628
Latin America	-	<1%	-	1,628
Austria	1%	-	7,585	-
Other/No Answer	1%	1%	4,551	13,022

Total Visitor Expenditures			
	2010	2011	% Change
Total Visitor Expenditures	\$1,199,075,588	\$1,367,743,704	14.1%
Paid Accommodations	\$753,464,281	\$906,919,737	20.4%

Average Per Person Per Day Expenditures		
2010	2011	% Change
\$119.01	\$114.80	-3.5%

First-Time/Repeat Visitors to Lee County		
	2010	2011
First-time	21%	23%
Repeat	78%	75%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2010	2011	% Change	2010	2011	% Change	2010	2011	% Change
Property Managers Responding									
Hotel/Motel/Resort/B&B	63.7%	69.0%	8.4%	\$153.38	\$158.58	3.4%	\$97.66	\$109.42	12.0%
Condo/Cottage/Vacation Home	74.0%	75.4%	1.9%	\$204.92	\$203.18	-0.8%	\$151.70	\$153.27	1.0%
RV Park/Campground	84.0%	83.3%	-0.8%	\$48.57	\$50.61	4.2%	\$40.78	\$42.14	3.3%
AVERAGE	70.4%	73.8%	4.8%	\$139.50	\$140.27	0.6%	\$98.23	\$103.56	5.4%



Visitor Profile Analysis April 2011

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

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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.



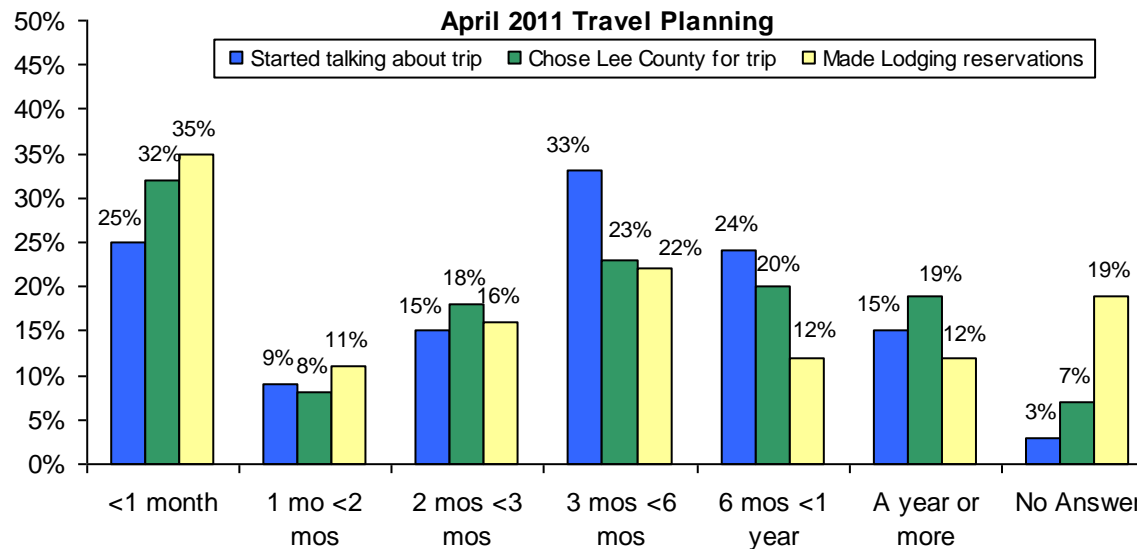
Travel Planning

	Started Talking About Trip		Chose Lee County for Trip		Made Lodging Reservations	
	2010	2011	2010	2011	2010	2011
Total Respondents	204	206	204	206	204	206
Less than 3 months (net)	17%	<25%>	25%	32%	29%	35%
<1 month	2%	2%	3%	6%	2%	<7%>
1 month - <2 months	6%	9%	9%	8%	13%	11%
2 months - <3 months	9%	15%	13%	18%	13%	16%
3 months or more (net)	<80%>	71%	<71%>	62%	<58%>	46%
3 months - <6 months	35%	33%	30%	23%	27%	22%
6 months - <1 year	28%	24%	22%	20%	<19%>	12%
A year or more	17%	15%	19%	19%	12%	12%
No Answer	2%	3%	4%	7%	12%	<19%>

Q3: When did you "start talking" about going on this trip?

Q4: When did you choose Lee County for this trip?

Q5: When did you make lodging reservations for this trip?



Travel Planning



Reserved Accommodations		
	April	
	2010	2011
Total Respondents Staying in Paid Accommodations	143	147
Before leaving home	94%	91%
After arriving in Florida	2%	5%
On the road, but not in Florida	-	1%
No Answer	4%	3%

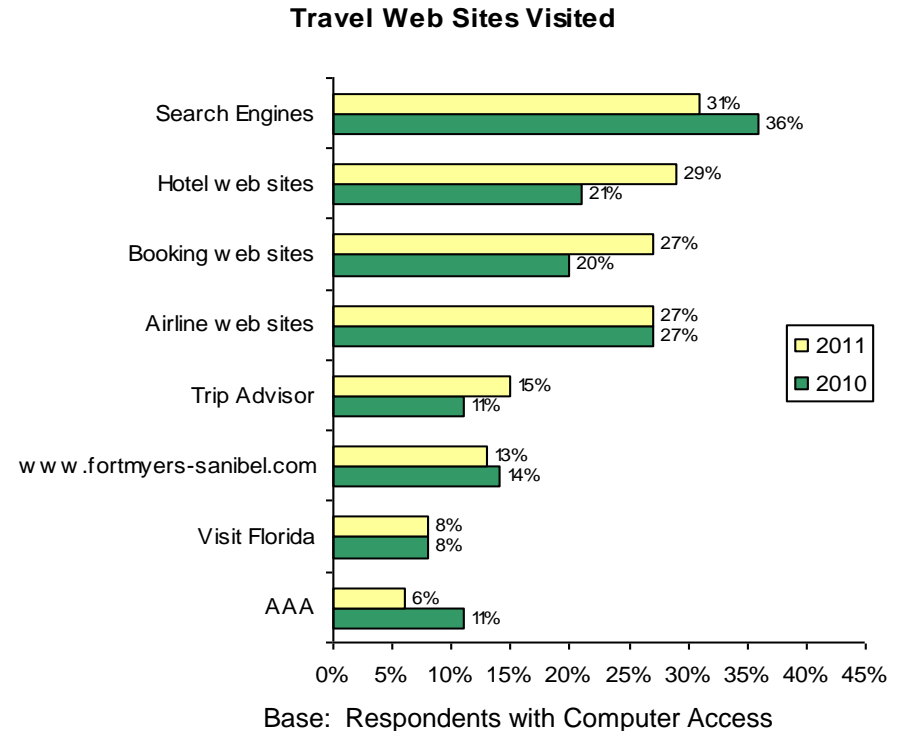
Q6: Did you make accommodation reservations for your stay in Lee County?

Travel Planning



Travel Web Sites Visited by April Travelers		
	2010	2011
Total Respondents with computer access	190	192
<u>Visited web sites (net)</u>	<u>80%</u>	<u>82%</u>
Search Engines	36%	31%
Hotel web sites	21%	29%
Booking web sites	20%	27%
Airline web sites	27%	27%
Trip Advisor	11%	15%
www.fortmyers-sanibel.com	14%	13%
Visit Florida	8%	8%
AAA	11%	6%
Travel Channel	2%	1%
Other	20%	15%
<u>Did not visit web sites (net)</u>	<u>16%</u>	<u>15%</u>
No Answer	4%	3%

Q9. While planning this trip, which of the following web sites did you visit?
(Please mark ALL that apply)



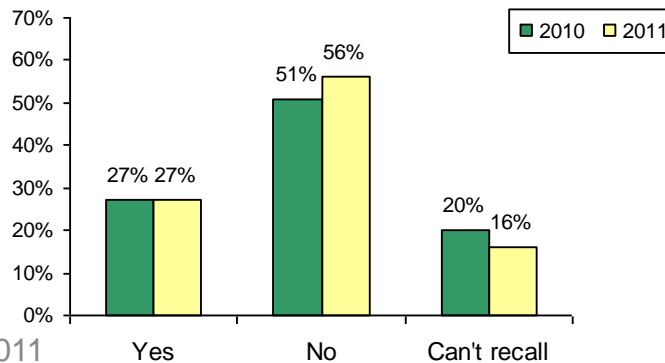
Travel Planning



April Travelers Requesting Information		
	2010	2011
Total Respondents	204	206
Requested information (net)	<u>33%</u>	<u>37%</u>
Hotel Web Site	13%	13%
Call hotel	6%	8%
VCB Web Site	10%	6%
Visitor Guide	7%	3%
Call local Chamber of Commerce	1%	<1%
Other	8%	13%
Did not request information (net)	<u>51%</u>	<u>54%</u>
No Answer	16%	9%

Q10: For this trip, did you request any information about our area by...
(Please mark ALL that apply.)

Recall of Promotions



April 2011

15

Travel Agent Assistance		
	2010	2011
Total Respondents	204	206
Yes	6%	7%
No	92%	91%

Q11: Did a travel agent assist you with this trip?

Recall of Lee County Promotions		
	2010	2011
Total Respondents	204	206
Yes	27%	27%
No	51%	56%
Can't recall	20%	16%

Q13: Over the past six months, have you seen, read or heard any travel stories, advertising or promotions for the Lee County area?

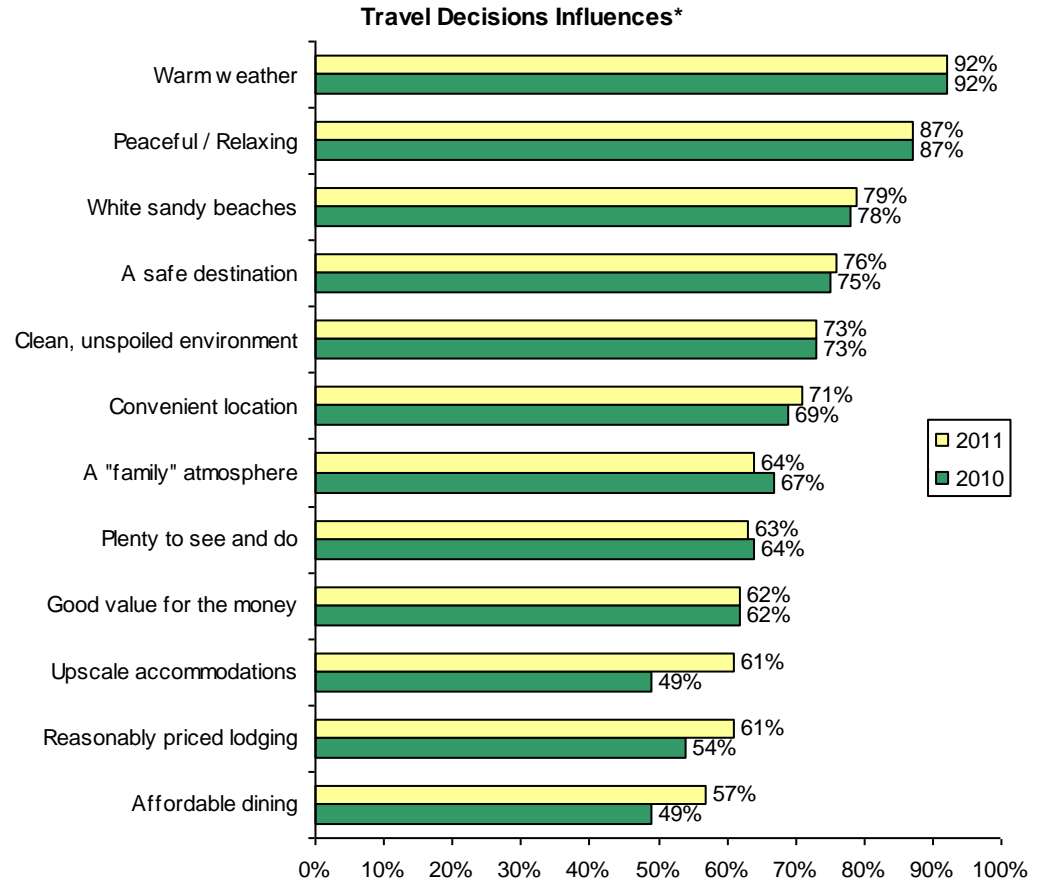
Travel Planning



April Travel Decision Influences*		
	2010	2011
Total Respondents	204	206
Warm weather	92%	92%
Peaceful / Relaxing	87%	87%
White sandy beaches	78%	79%
A safe destination	75%	76%
Clean, unspoiled environment	73%	73%
Convenient location	69%	71%
A "family" atmosphere	67%	64%
Plenty to see and do	64%	63%
Good value for the money	62%	62%
Upscale accommodations	49%	<61%>
Reasonably priced lodging	54%	61%
Affordable dining	49%	57%

Q14: 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

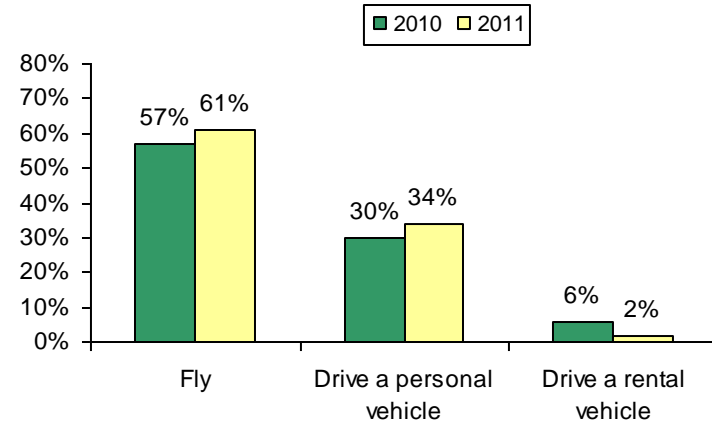
Mode of Transportation		
	2010	2011
Total Respondents	204	206
Fly	57%	61%
Drive a personal vehicle	30%	34%
Drive a rental vehicle	6%	2%
Drive an RV	<7%>	1%
Other/No Answer (net)	-	1%

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

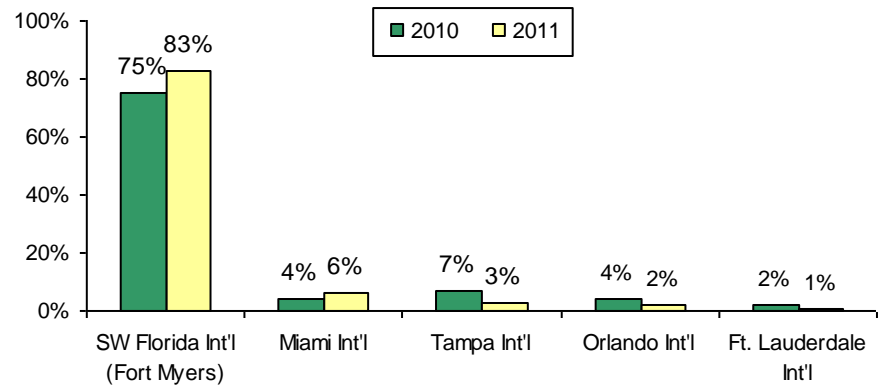
Airport		
	2010	2011
Total Respondents who arrived by air	117	126
SW Florida Int'l (Fort Myers)	75%	83%
Miami Int'l	4%	6%
Tampa Int'l	7%	3%
Orlando Int'l	4%	2%
Ft. Lauderdale Int'l	2%	1%
West Palm Beach Int'l	-	1%
Other/No Answer (net)	9%	3%

Q2: At which Florida airport did you land?

Mode of Transportation



Airport

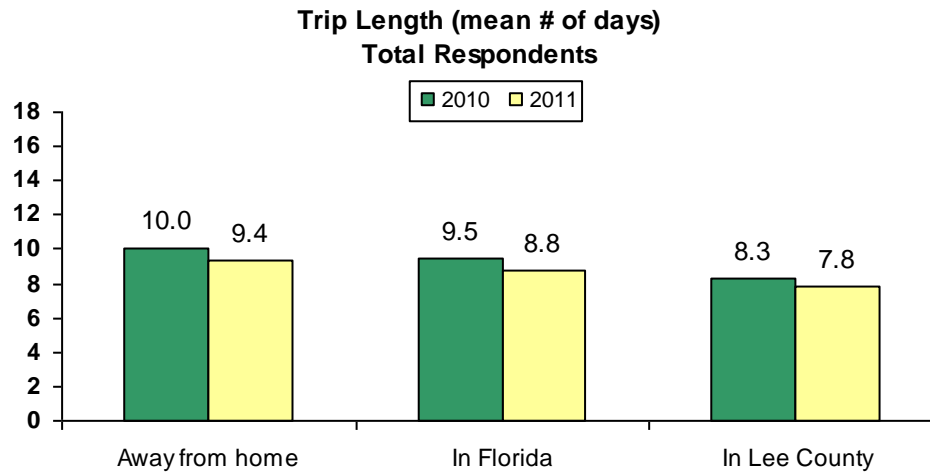




Trip Profile

April Trip Length Mean # of Days			
	Total Respondents		
	2010	2011	% Change
Total Respondents	204	206	
Away from home	10.0	9.4	-6.0%
In Florida	9.5	8.8	-7.4%
In Lee County	8.3	7.8	-6.0%

Q7: On this trip, how many days will you be:

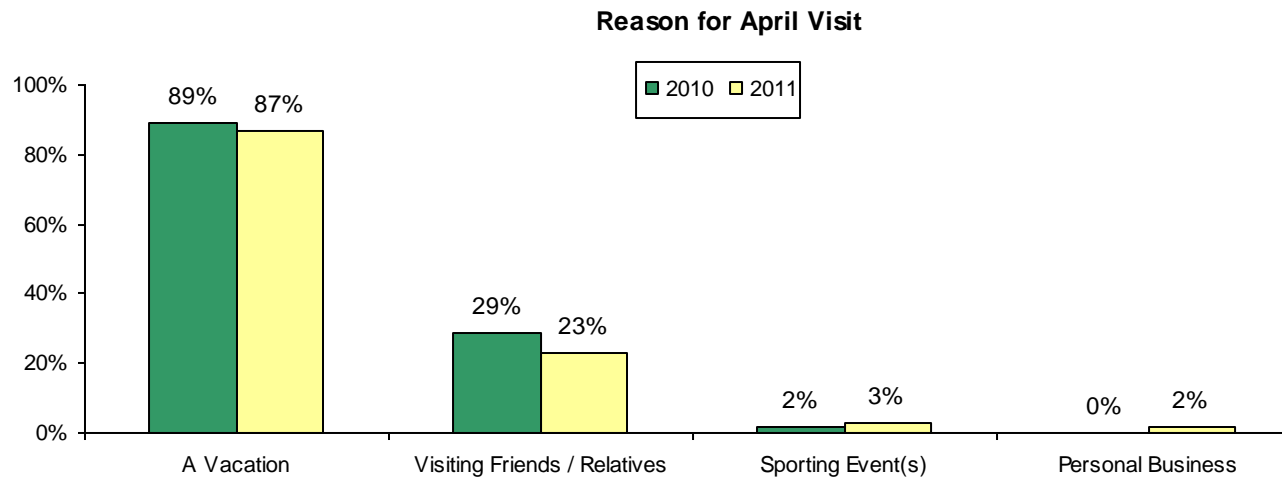




Trip Profile

Reason for April Visit		
	2010	2011
Total Respondents	204	206
A Vacation	89%	87%
Visiting Friends / Relatives	29%	23%
Sporting Event(s)	2%	3%
Personal Business	-	2%
Other Business Trip	1%	1%
A Conference / Meeting	<1%	-
Other/No Answer (net)	2%	<5%>

Q15: Did you come to our area for...(Please mark all that apply.)





Trip Profile

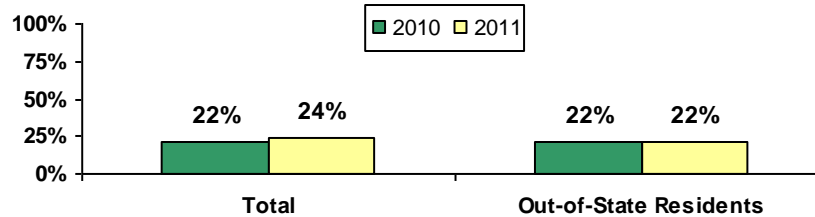
First Time Visitors to Lee County

	TOTAL		Florida Residents		Out-of-State Residents		International Visitors	
	2010	2011	2010	2011	2010	2011	2010	2011
Total Respondents	204	206	5*	11*	165	158	25*	19*
Yes	22%	24%	N/A	N/A	22%	22%	N/A	N/A
No	77%	74%	N/A	N/A	78%	76%	N/A	N/A
No Answer	1%	2%	N/A	N/A	1%	3%	N/A	N/A

Q20: Is this your first visit to Lee County?

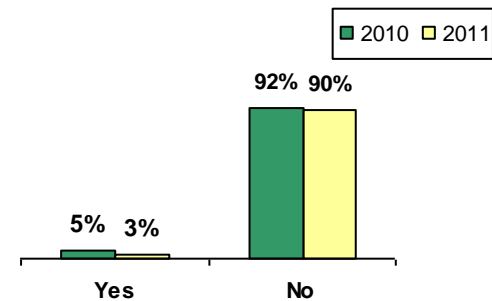
*N/A: Insufficient number of responses for statistical analysis (N<30).

First Time Visitors to Lee County



First Time Visitors to Florida		
	2010	2011
Total Respondents	204	206
Yes	5%	3%
No	92%	90%
No answer	<1%	1%
<i>FL Residents*</i>	3%	5%

First Time Visitors to Florida



Q18: 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.



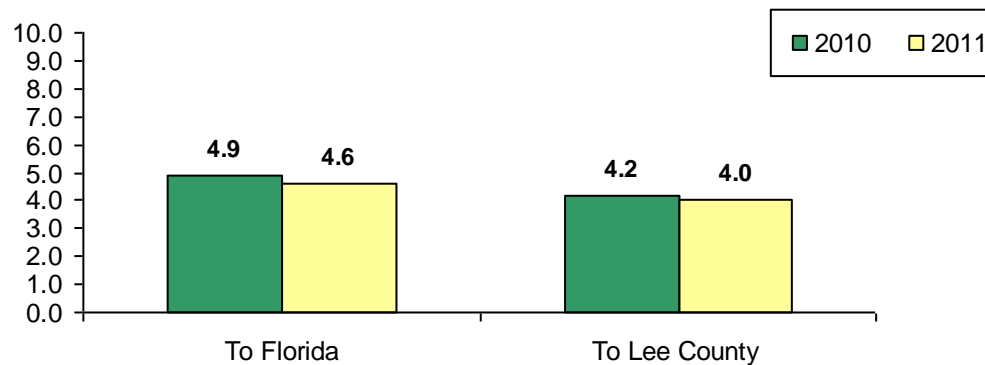
Trip Profile

Previous Visits in Five Years				
	Mean # of Visits to Florida		Mean # of Visits to Lee County	
	2010	2011	2010	2011
Base: Repeat Visitors	188 (FL res. Excl.)	185 (FL res. Excl.)	156	153
Number of visits	4.9	4.6	4.2	4.0

Q19: Over the past five (5) years, how many times have you visited Florida?

Q21: Over the past five (5) years, how many times have you visited Lee County?

Previous Visits in Five Years

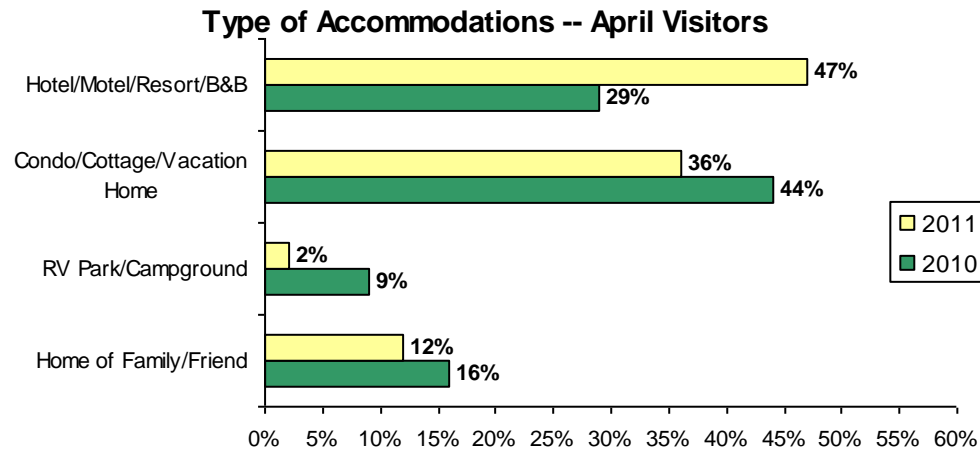




Trip Profile

Type of Accommodations - April Visitors		
	2010	2011
Total Respondents	204	206
Hotel/Motel/Resort/B&B	29%	<47%>
Hotel/motel/inn	11%	<25%>
Resort	16%	21%
B&B	1%	1%
Condo/Cottage/Vacation Home	44%	36%
Rented home/condo	<32%>	22%
Borrowed home/condo	4%	3%
Owned home/condo	8%	11%
RV Park/Campground	<9%>	2%
Home of family/friend	16%	12%
Day trip (no accommodations)	2%	3%

Q25: Are you staying overnight (either last night or tonight)...



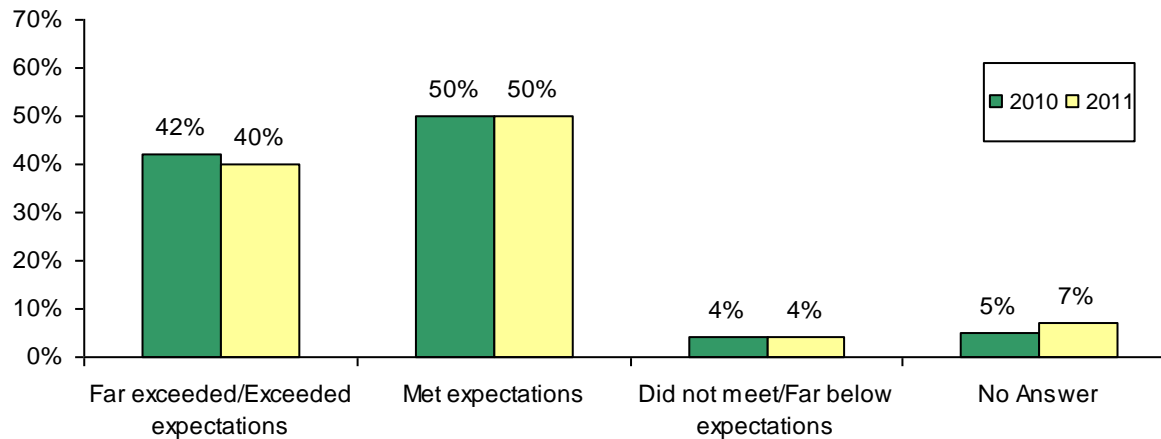


Trip Profile

Quality of Accommodations		
	2010	2011
Total Respondents	204	206
Far exceeded/Exceeded expectations	42%	40%
Met your expectations	50%	50%
Did not meet/Far below expectations	4%	4%
No Answer	5%	7%

Q26: How would you describe the quality of your accommodations? Do you feel they:

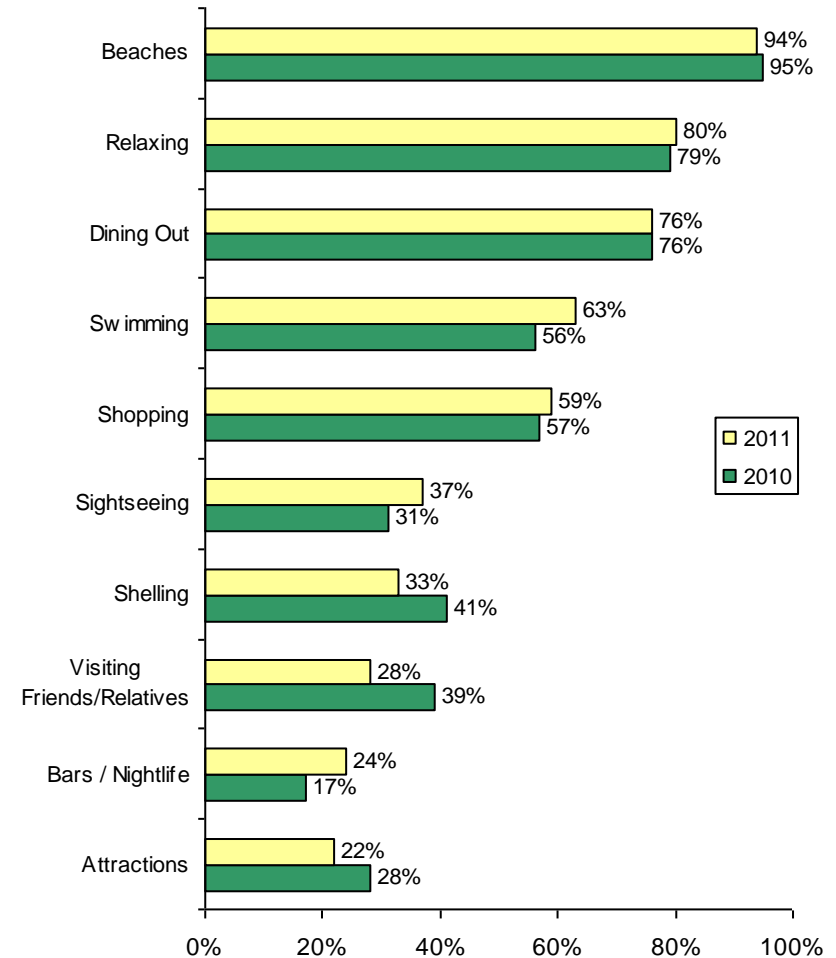
Quality of Accommodations





Trip Activities

April Activities Enjoyed		
	2010	2011
Total Respondents	204	206
Beaches	95%	94%
Relaxing	79%	80%
Dining Out	76%	76%
Swimming	56%	63%
Shopping	57%	59%
Sightseeing	31%	37%
Shelling	41%	33%
Visiting Friends/Relatives	<39%>	28%
Bars / Nightlife	17%	24%
Attractions	28%	22%
Exercise / Working Out	24%	21%
Watching Wildlife	22%	18%
Photography	23%	18%
Bicycle Riding	23%	17%
Boating	9%	13%
Fishing	10%	11%
Parasailing / Jet Skiing	10%	11%
Birdwatching	14%	11%
Golfing	11%	10%
Miniature Golf	<14%>	7%
Sporting Event	6%	6%
Guided Tour	4%	6%
Tennis	6%	3%
Kayaking / Canoeing	<8%>	3%
Cultural Events	<9%>	2%
Scuba Diving / Snorkeling	2%	1%
Other	3%	4%
No Answer	2%	-



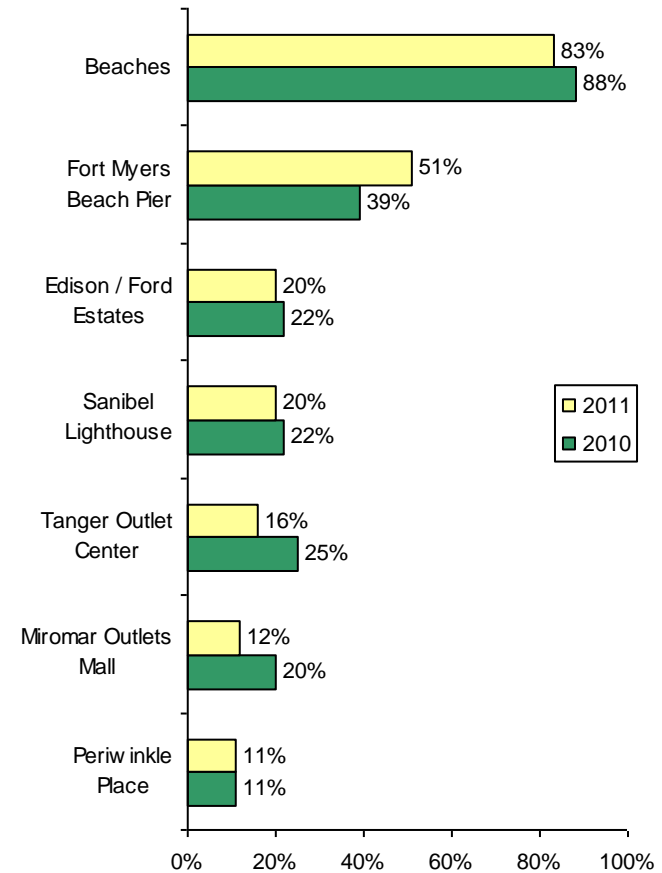
Q28: What activities or interests are you enjoying while in Lee County?
(Please mark ALL that apply.)

Trip Activities



April Attractions Visited		
	2010	2011
Total Respondents	204	206
Beaches	88%	83%
Fort Myers Beach Pier	39%	<51%>
Edison / Ford Estates	22%	20%
Sanibel Lighthouse	22%	20%
Tanger Outlet Center	<25%>	16%
Miromar Outlets Mall	<20%>	12%
Periwinkle Place	11%	11%
Bell Tower Shops	12%	10%
Shell Factory and Nature Park	11%	10%
Ding Darling National Wildlife Refuge	<21%>	9%
Coconut Point Mall	12%	8%
Gulf Coast Town Center	5%	6%
Edison Mall	11%	6%
Manatee Park	5%	3%
Barbara B. Mann Performing Arts Hall	2%	2%
Bailey-Matthews Shell Museum	3%	<1%>
Babcock Wilderness Adventures	<1%>	-
Broadway Palm Dinner Theater	5%	-
Other	7%	9%
None/No Answer	3%	5%

April Attractions Visited



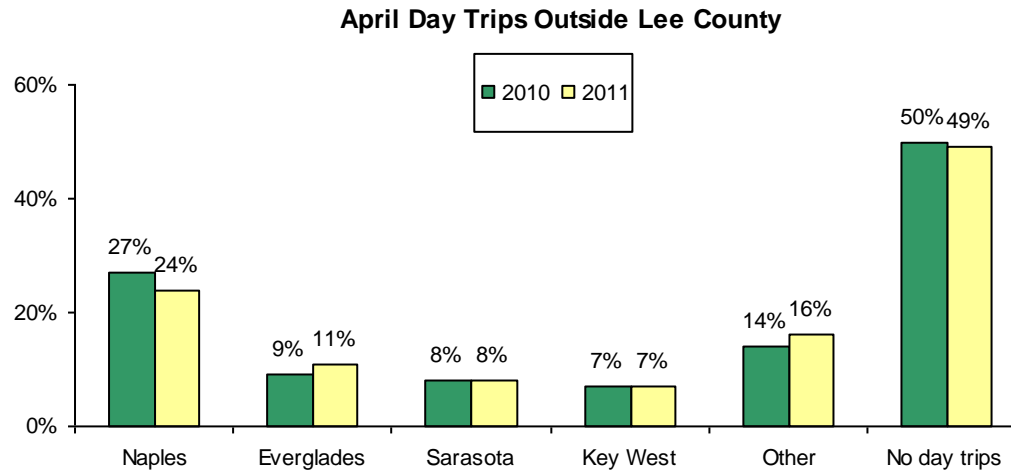
Q29. On this trip, which attractions are you visiting? (Please mark ALL that apply.)



Trip Activities

April Day Trips Outside Lee County		
	2010	2011
Total Respondents	204	206
<u>Any day trips (net)</u>	<u>45%</u>	<u>41%</u>
<i>Naples</i>	27%	24%
<i>Everglades</i>	9%	11%
<i>Sarasota</i>	8%	8%
<i>Key West</i>	7%	7%
<i>Other</i>	14%	16%
<u>No day trips</u>	<u>50%</u>	<u>49%</u>
No Answer	5%	10%

Q30: Where did you go on day trips outside Lee County?

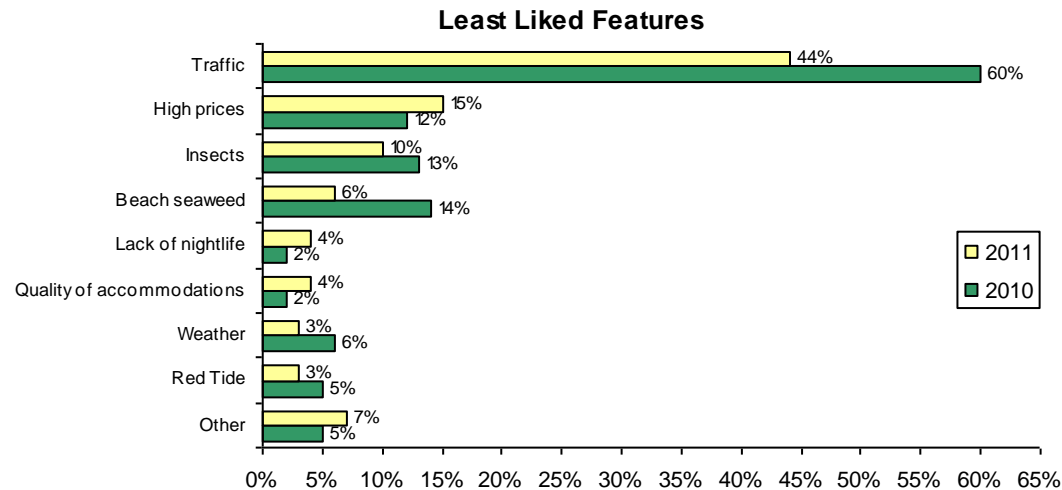




Trip Activities

Least Liked Features		
	2010	2011
Total Respondents	204	206
Traffic	<60%>	44%
High prices	12%	15%
Insects	13%	10%
Beach seaweed	<14%>	6%
Lack of nightlife	2%	4%
Quality of accommodations	2%	4%
Weather	6%	3%
Red Tide	5%	3%
Other	5%	7%
Nothing/No Answer (net)	23%	27%

Q34: During the specific visit, which features have you liked least about our area? (Please mark ALL that apply.)

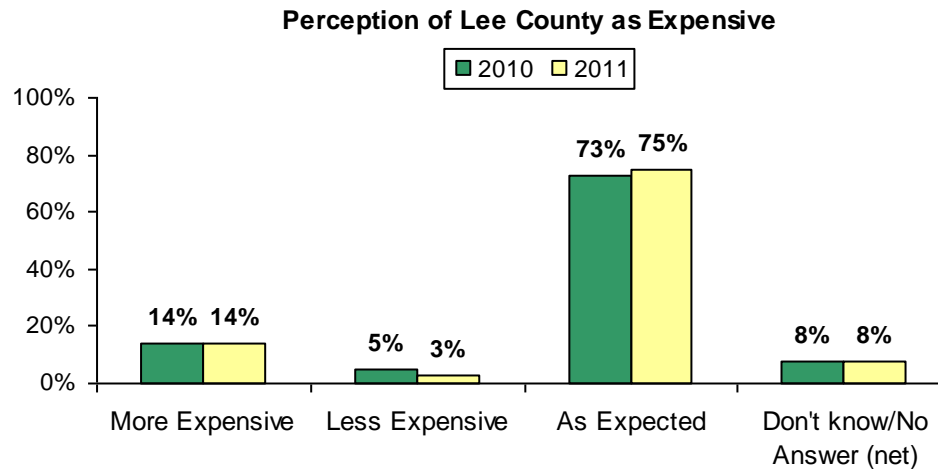




Trip Activities

Perception of Lee County as Expensive		
	2010	2011
Total Respondents	204	206
More Expensive	14%	14%
Less Expensive	5%	3%
As Expected	73%	75%
Don't know/No Answer (net)	8%	8%

Q31: From your experience, would you say that our area is more expensive, less expensive, or as expensive as you had expected?



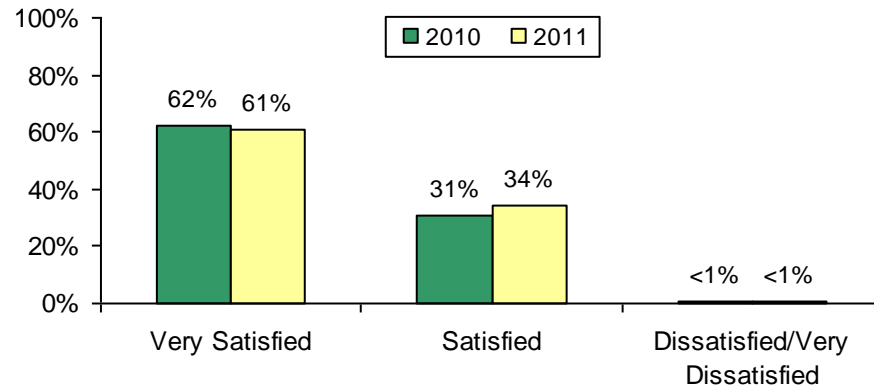


Lee County Experience

Satisfaction with Visit		
	2010	2011
Total Respondents	204	206
<u>Satisfied</u>	<u>94%</u>	<u>95%</u>
<i>Very Satisfied</i>	62%	61%
<i>Satisfied</i>	31%	34%
Neither	3%	1%
Dissatisfied/Very Dissatisfied	<1%	<1%
Don't know/no answer	3%	4%

Q33: How satisfied are you with your stay in Lee County?

Satisfaction with Visit





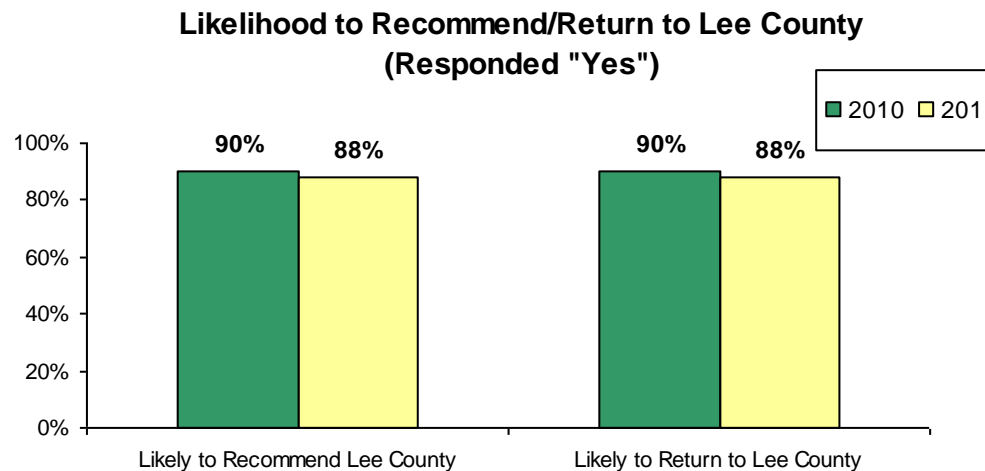
Future Plans

Likelihood to Recommend/Return to Lee County		
	2010	2011
Total Respondents	204	206
Likely to Recommend Lee County	90%	88%
Likely to Return to Lee County	90%	88%
Base: Total Respondents Planning to Return	184	181
Likely to Return Next Year	54%	53%

Q32: Would you recommend Lee County to a friend over other vacation areas in Florida?

Q35: Will you come back to Lee County?

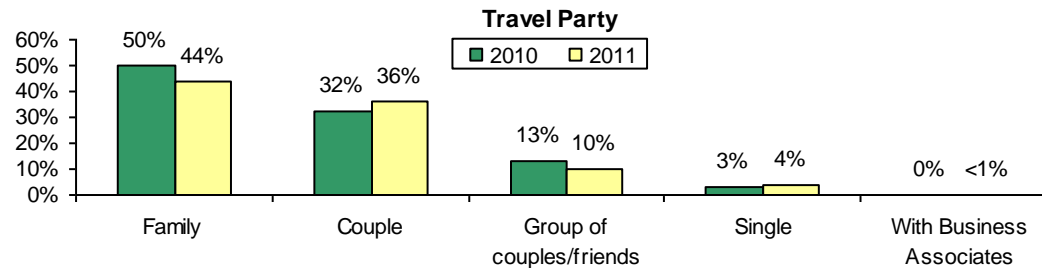
Q36: Will you come back next year?





Visitor and Travel Party Demographic Profile

April Travel Party		
	2010	2011
Total Respondents	204	206
Family	50%	44%
Couple	32%	36%
Group of couples/friends	13%	10%
Single	3%	4%
With Business Associates	-	<1%
In a Tour Group	-	<1%
Mean travel party size	<3.9>	3.3
Mean adults in travel party	2.8	2.6



Travel Parties with Children		
	2010	2011
Total Respondents	204	206
Traveling with any Children (net)	48%	39%
Any younger than 6	15%	11%
Any 6 - 11 years old	23%	21%
Any 12 - 17 years old	30%	23%

Q22: On this trip, are you traveling:

Q23: Including yourself, how many people are in your immediate travel party?

Q24: How many of those people are:

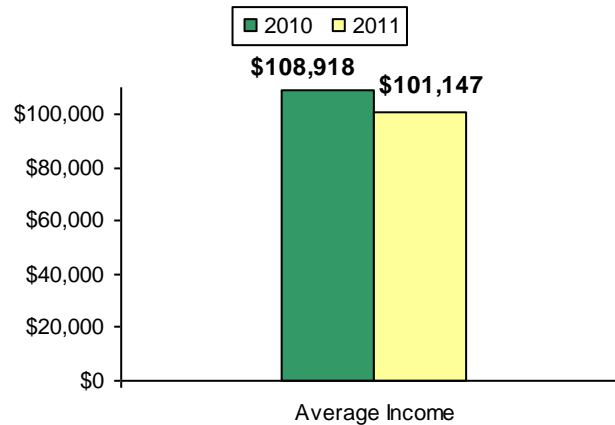
Younger than 6 years old/6-11 years old/12-17 years old/Adults



Visitor and Travel Party Demographic Profile

April Visitor Demographic Profile		
	2010	2011
Total Respondents	204	206
Vacations per year (mean)	2.7	2.6
Short getaways per year (mean)	3.7	3.5
Age of respondent (mean)	49.8	48.8
Annual household income (mean)	\$108,918	\$101,147
Marital Status		
Married	<79%>	71%
Single	11%	15%
Other	9%	12%

Annual Household Income



Q37: How many vacations, lasting FIVE (5) OR MORE NIGHTS AWAY FROM HOME, do you take in an average year?

Q38: 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?

Q41: What is your age, please?

Q43: What is your total annual household income before taxes?

Q40. Are you: Married/Single/Other



Visitor Origin and Visitation Estimates

Total April Visitation					
	%		Visitor Estimates		% Change
	2010	2011	2010	2011	2010-2011
Paid Accommodations	50%	47%	240,698	244,576	1.6%
Friends/Relatives	50%	53%	242,155	273,858	13.1%
<i>Total Visitation</i>			482,853	518,434	7.4%
April Visitor Origin - Visitors Staying in Paid Accommodations					
	2010	2011	2010	2011	
United States	87%	90%	210,400	219,619	4.4%
Canada	4%	3%	10,099	8,319	-17.6%
UK	1%	3%	1,683	6,655	295.4%
Switzerland	-	1%	-	3,328	-
France	1%	1%	1,683	3,328	97.7%
Scandinavia	1%	1%	1,683	1,664	-1.2%
Germany	4%	1%	10,099	1,664	-83.5%
Austria	1%	-	1,683	-	-
BeNeLux	1%	-	1,683	-	-
No Answer	1%	-	1,683	-	-
U.S. Region (Paid Accommodations)					
	2010	2011	2010	2011	
Florida	2%	3%	3,366	6,655	97.7%
South (including Florida)	14%	8%	28,614	18,302	-36.0%
Midwest	58%	60%	122,874	131,439	7.0%
Northeast	21%	23%	43,763	49,913	14.1%
West	2%	2%	3,366	3,328	-1.2%
No Answer	6%	8%	11,782	16,638	41.2%

2011 Top DMAs (Paid Accommodations)		
Chicago	7%	14,974
Indianapolis	7%	14,974
South Bend-Elkhart	7%	14,974
Boston (Manchester, NH)	5%	9,983
Columbus, OH	5%	9,983
Minneapolis-Saint Paul	5%	9,983
New York	5%	9,983
Buffalo	4%	8,319
Fort Wayne	4%	8,319
Cleveland-Akron (Canton)	3%	6,655
Grand Rapids-Kalamazoo-Battle Creek	3%	6,655
Milwaukee	3%	6,655



Occupancy Data Analysis April 2011

Property managers representing 120 properties in Lee County were interviewed for the April 2011 Occupancy Survey between May 1 and May 15, 2011, a sample considered accurate to plus or minus 8.9 percentage points at the 95% confidence level.

Property managers representing 152 properties in Lee County were interviewed for the April 2010 Occupancy Survey between May 1 and May 15, 2010, a sample considered accurate to plus or minus 7.9 percentage points at the 95% confidence level.



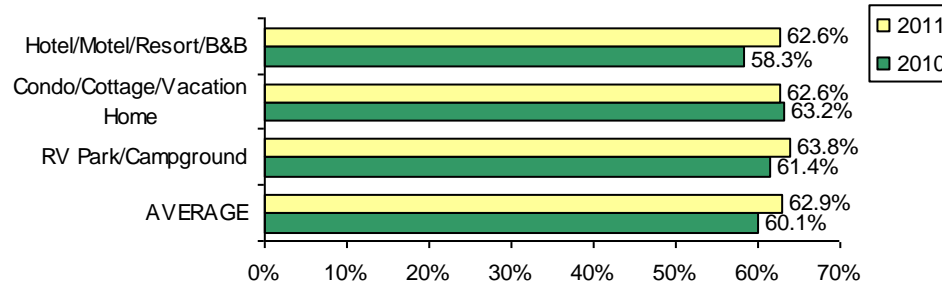
April Occupancy/Daily Rates

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2010	2011	% Change	2010	2011	% Change	2010	2011	% Change
Property Managers Responding	142	113		146	116		142/146	113/116	
Hotel/Motel/Resort/B&B	58.3%	62.6%	7.4%	\$147.39	\$156.71	6.3%	\$85.92	\$98.13	14.2%
Condo/Cottage/Vacation Home	63.2%	62.6%	-0.9%	\$184.60	\$207.10	12.2%	\$116.66	\$129.68	11.2%
RV Park/Campground	61.4%	63.8%	3.9%	\$42.46	\$41.51	-2.2%	\$26.06	\$26.49	1.7%
AVERAGE	60.1%	62.9%	4.7%	\$135.24	\$140.81	4.1%	\$81.26	\$88.57	9.0%

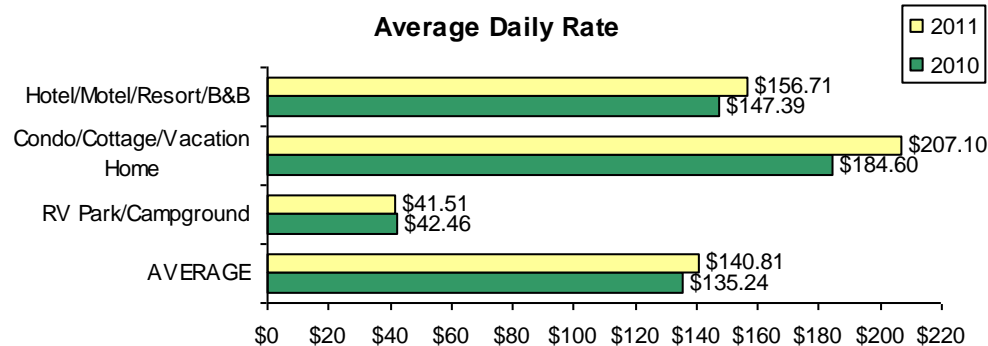
Q16: What was your overall average occupancy rate for the month of April ?

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

Average Occupancy Rate



Average Daily Rate

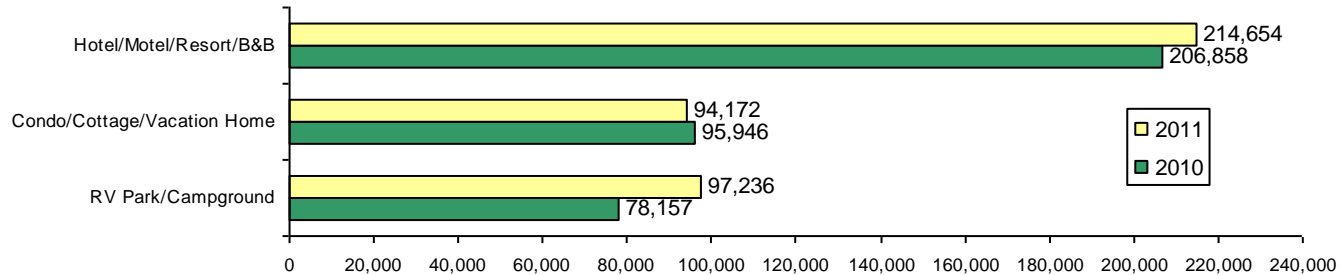




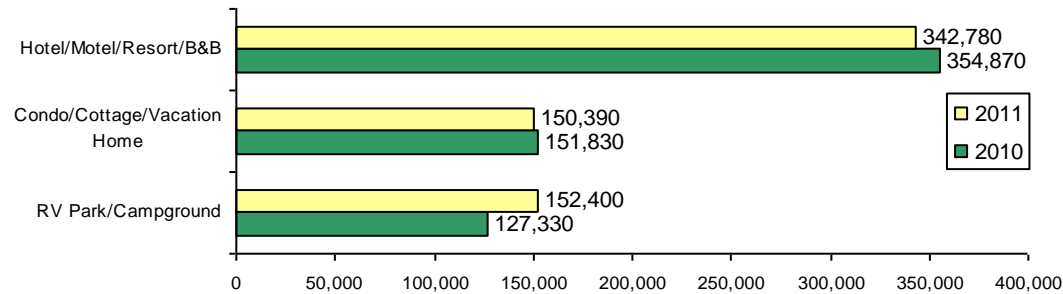
April Room/Unit/Site Nights

	Occupied Room Nights			Available Room Nights		
	2010	2011	% Change	2010	2011	% Change
Hotel/Motel/Resort/B&B	206,858	214,654	3.8%	354,870	342,780	-3.4%
Condo/Cottage/Vacation Home	95,946	94,172	-1.8%	151,830	150,390	-0.9%
RV Park/Campground	78,157	97,236	24.4%	127,330	152,400	19.7%
Total	380,961	406,062	6.6%	634,030	645,570	1.8%

Occupied Room Nights



Available Room Nights



Lodging Management Estimates

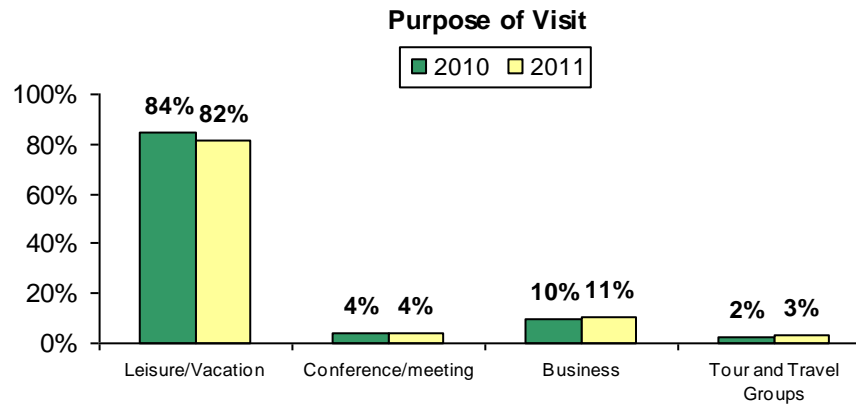


April Guest Profile		
	2010	2011
Property Managers Responding	125	100
<u>Purpose of Visit</u>		
Leisure/Vacation	84%	82%
Conference/meeting	4%	4%
Business	10%	11%
Tour and Travel Groups	2%	3%
Property Managers Responding	139	108
Average guests per room	2.7	2.6
Property Managers Responding	136	108
Average length of stay in nights	5.9	6.3

Q23: What percent of your April room/site/unit occupancy was generated by:

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

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



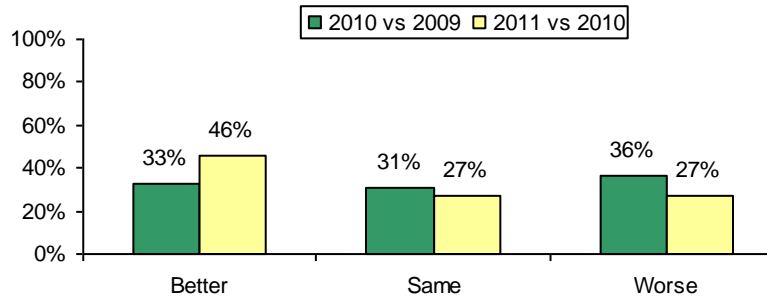


Occupancy Barometer

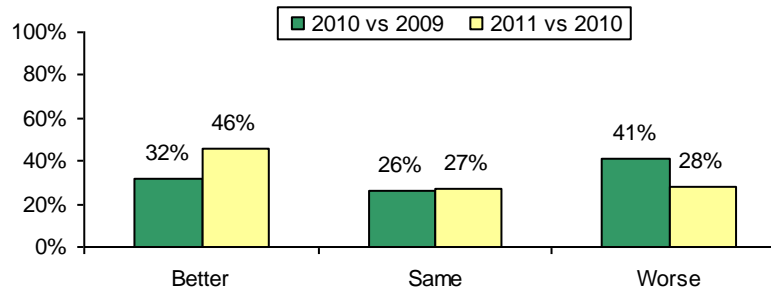
	April Occupancy		April Revenue	
	2010	2011	2010	2011
Property Managers Responding	139	113	136	112
Better/Same (NET)	64%	73%	59%	<72%>
Better	33%	<46%>	32%	<46%>
Same	31%	27%	26%	27%
Worse	36%	27%	<41%>	28%

Q25: Was your April occupancy better, the same, or worse than it was in April 2010?
 How about your property's April revenue – better, the same, or worse than April 2010?

April Occupancy



April Revenue



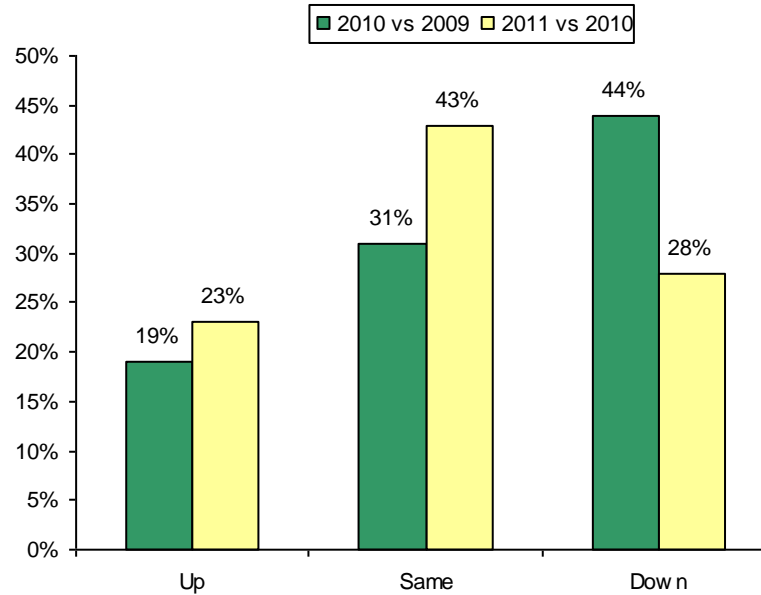


Occupancy Barometer

Level of Reservations for next 3 months Compared to Last Year		
	2010	2011
Total Answering Respondents	134	111
<u>Up/Same (net)</u>	<u>49%</u>	<u><67%></u>
Up	19%	23%
Same	31%	<43%>
Down	<44%>	28%
N/A	7%	5%

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

Level of Reservations for Next 3 Months



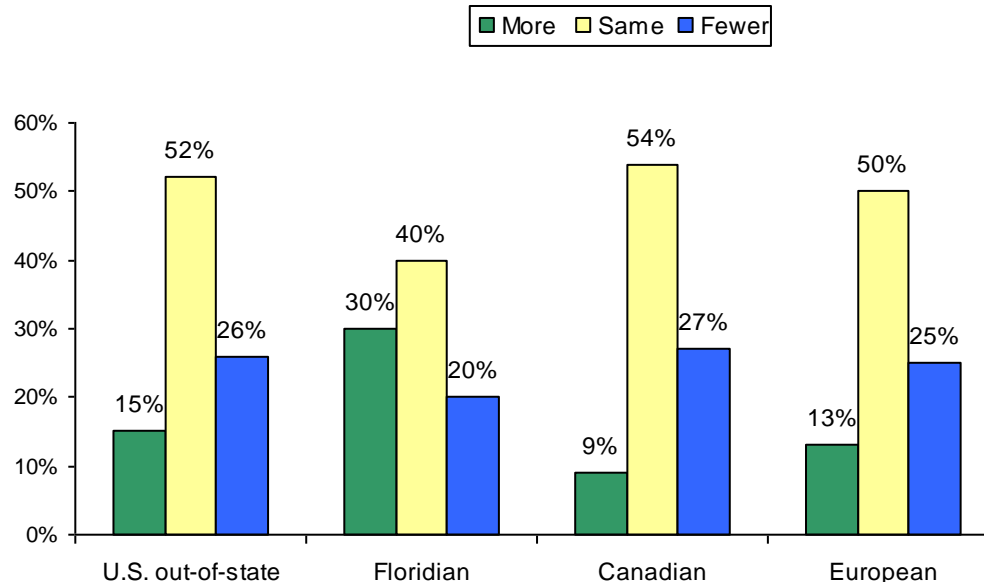


Occupancy Barometer

Origin of Guests for Next 3 Months Compared to Last Year								
Property Managers Responding (120/92 Minimum)	More		Same		Fewer		Not Applicable	
	2010	2011	2010	2011	2010	2011	2010	2011
U.S out-of-state	13%	15%	44%	52%	32%	26%	10%	7%
Floridian	20%	30%	40%	40%	31%	20%	10%	10%
Canadian	8%	9%	40%	<54%>	38%	27%	14%	11%
European	8%	13%	39%	50%	<38%>	25%	16%	12%

Q27: Now thinking about the specific origins of your guests, for the upcoming May, June, July do you expect more, the same, or fewer guests from each of the following areas than you had in May, June, July of one year ago?

Origin of Guests for Next 3 Months Compared to Last Year
April 2011



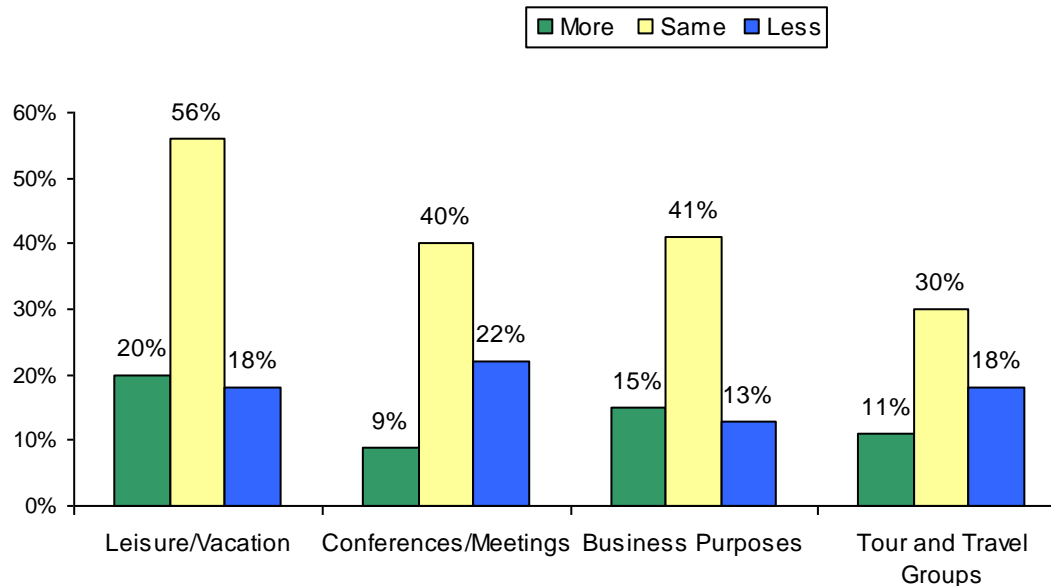


Occupancy Barometer

Type of Travelers for Next 3 Months Compared to Last Year								
Property Managers Responding (114/91 Minimum)	More		Same		Less		Not Applicable	
	2010	2011	2010	2011	2010	2011	2010	2011
Leisure/Vacation	17%	20%	43%	56%	<32%>	18%	8%	6%
Conferences/Meetings	3%	9%	24%	<40%>	24%	22%	<49%>	30%
Business Purposes	7%	15%	29%	41%	22%	13%	41%	30%
Tour and Travel Groups	4%	<11%>	22%	30%	19%	18%	<55%>	40%

Q28: Compared to May, June and July of one year ago will the following types of travelers generate more, the same, or less business for your property in the upcoming May, June and July?

**Type of Travelers for Next 3 Months Compared to Last Year
 April 2011**





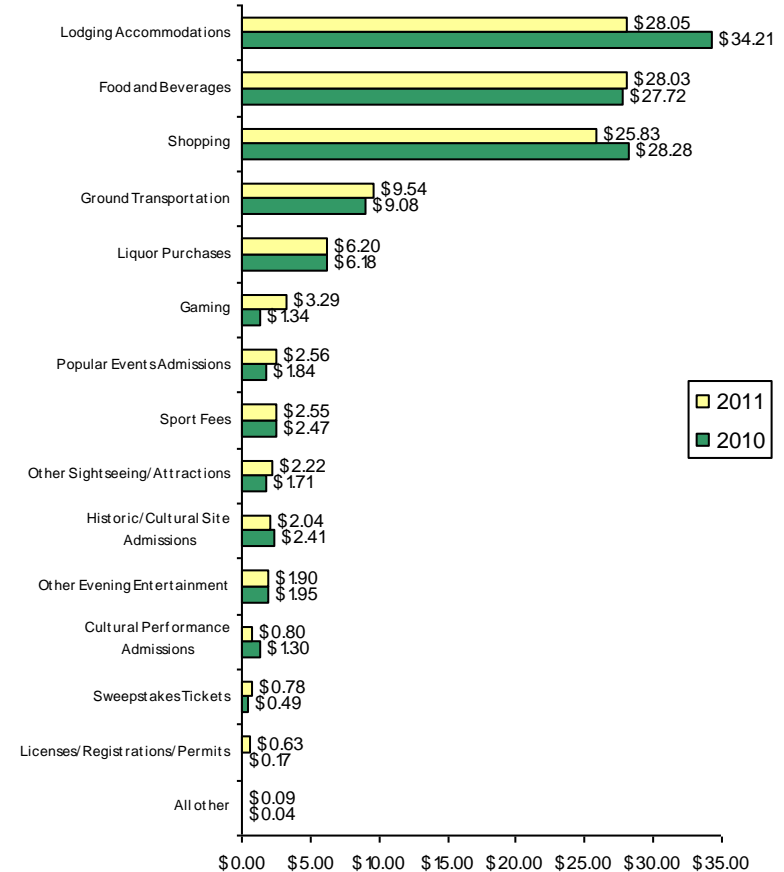
Economic Impact Analysis April 2011



Average Expenditures

April Average Expenditures per Person per Day			
	2010	2011	% Change
TOTAL	\$119.19	\$114.51	-3.9%
Lodging Accommodations	\$34.21	\$28.05	-18.0%
Food and Beverages	\$27.72	\$28.03	1.1%
Shopping	\$28.28	\$25.83	-8.7%
Ground Transportation	\$9.08	\$9.54	5.1%
Liquor Purchases	\$6.18	\$6.20	0.3%
Gaming	\$1.34	\$3.29	145.5%
Popular Events Admissions	\$1.84	\$2.56	39.1%
Sport Fees	\$2.47	\$2.55	3.2%
Other Sightseeing/Attractions	\$1.71	\$2.22	29.8%
Historic/Cultural Site Admissions	\$2.41	\$2.04	-15.4%
Other Evening Entertainment	\$1.95	\$1.90	-2.6%
Cultural Performance Admissions	\$1.30	\$0.80	-38.5%
Sweepstakes Tickets	\$0.49	\$0.78	59.2%
Licenses/Registrations/Permits	\$0.17	\$0.63	270.6%
All other	\$0.04	\$0.09	125.0%

Average Expenditures per Person per Day

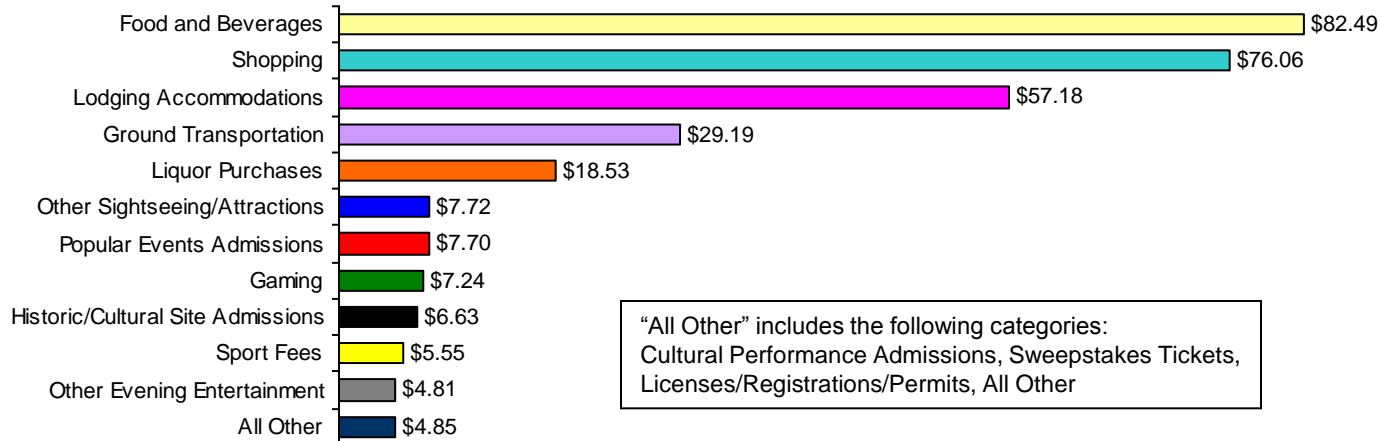




Total Visitor Expenditures by Spending Category

April TOTAL EXPENDITURES			
	2010	2011	% Change
TOTAL	\$257,804,660	\$307,953,844	19.5%
Food and Beverages	\$63,591,129	\$82,492,353	29.7%
Shopping	\$67,107,821	\$76,061,922	13.3%
Lodging Accommodations	\$51,519,945	\$57,177,808	11.0%
Ground Transportation	\$22,861,220	\$29,186,598	27.7%
Liquor Purchases	\$14,468,411	\$18,532,492	28.1%
Other Sightseeing/Attractions	\$4,395,950	\$7,724,212	75.7%
Popular Events Admissions	\$6,543,880	\$7,697,689	17.6%
Gaming	\$3,546,654	\$7,237,673	104.1%
Historic/Cultural Site Admissions	\$8,209,674	\$6,628,887	-19.3%
Sport Fees	\$6,708,348	\$5,549,517	-17.3%
Other Evening Entertainment	\$5,780,350	\$4,813,838	-16.7%
All Other	\$3,071,278	\$4,850,855	57.9%

April 2011 Total Expenditures
(Millions)



"All Other" includes the following categories:
Cultural Performance Admissions, Sweepstakes Tickets,
Licenses/Registrations/Permits, All Other



Total Visitor Expenditures by Spending Category

ALL PROPERTIES						
	Staying in Paid Accommodations			Visiting Friends and Relatives/ Day Trippers		
	2010	2011	% Change	2010	2011	% Change
TOTAL	<u>\$140,311,336</u>	<u>\$176,533,512</u>	<u>25.8%</u>	<u>\$117,493,324</u>	<u>\$131,420,332</u>	<u>11.9%</u>
Lodging Accommodations	\$51,519,945	\$57,177,808	11.0%	\$0	\$0	-
Food and Beverages	\$28,825,590	\$41,006,168	42.3%	\$34,765,539	\$41,486,185	19.3%
Shopping	\$29,708,527	\$33,281,405	12.0%	\$37,399,294	\$42,780,517	14.4%
Ground Transportation	\$9,833,092	\$13,850,022	40.9%	\$13,028,128	\$15,336,576	17.7%
Liquor Purchases	\$6,210,533	\$8,563,192	37.9%	\$8,257,878	\$9,969,300	20.7%
Sport Fees	\$2,764,988	\$4,123,710	49.1%	\$3,943,360	\$1,425,807	-63.8%
Gaming	\$1,305,806	\$4,074,415	212.0%	\$2,240,848	\$3,163,258	41.2%
Popular Events Admissions	\$2,169,782	\$4,062,497	87.2%	\$4,374,098	\$3,635,192	-16.9%
Other Sightseeing/Attractions	\$2,081,035	\$2,935,669	41.1%	\$2,314,915	\$4,788,543	106.9%
Other Evening Entertainment	\$1,775,259	\$2,558,943	44.1%	\$4,005,091	\$2,254,895	-43.7%
Historic/Cultural Site Admissions	\$2,540,760	\$2,419,430	-4.8%	\$5,668,914	\$4,209,457	-25.7%
All Other	\$1,576,019	\$2,480,253	57.4%	\$1,495,259	\$2,370,602	58.5%

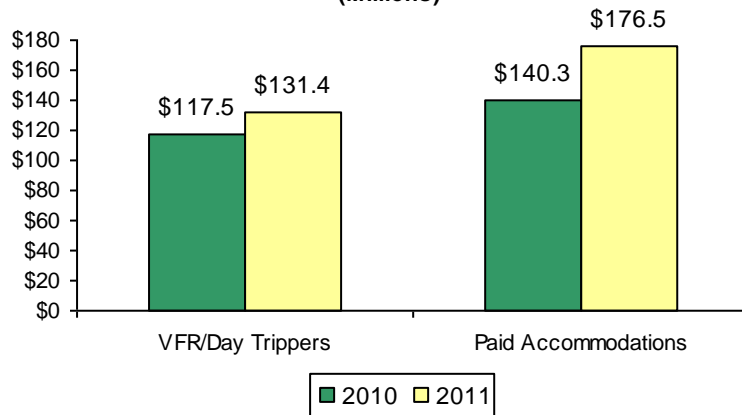
"All Other" includes the following categories:
Cultural Performance Admissions, Sweepstakes Tickets,
Licenses/Registrations/Permits, All Other



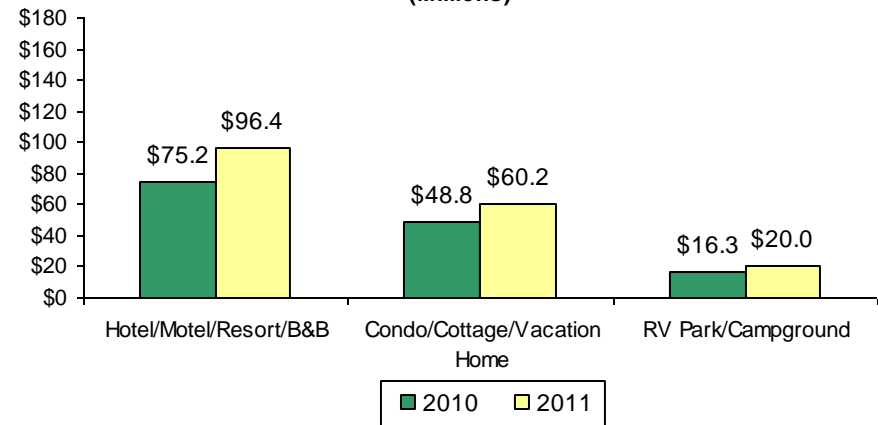
Total Visitor Expenditures by Lodging Type

April Total Expenditures by Lodging Type					
	2010	2011	% Change	2010	2011
TOTAL	\$257,804,660	\$307,953,844	19.5%	100%	100%
Visiting Friends & Relatives/Day Trippers	\$117,493,324	\$131,420,332	11.9%	46%	43%
Paid Accommodations	\$140,311,336	\$176,533,512	25.8%	54%	57%
<i>Hotel/Motel/Resort/B&B</i>	\$75,171,837	\$96,384,164	28.2%	29%	31%
<i>Condo/Cottage/Vacation Home</i>	\$48,793,870	\$60,165,878	23.3%	19%	20%
<i>RV Park/Campground</i>	\$16,345,629	\$19,983,470	22.3%	6%	6%

Expenditures by Lodging Type
(Millions)



Paid Accommodations Expenditures by Lodging Type
(Millions)





Direct and Indirect Impact of Visitor Expenditures

Estimated total visitor expenditures (detailed in 16 expense categories) are entered into an input/output model designed specifically for Lee County. This model classifies the visitor expenditure dollars by industry and identifies how the dollars move through the County economy. This Regional Input-Output Model is based on an economic model designed by the Federal Government, but it is modified using County Business Patterns to reflect how the economy of Lee County actually works.

In the text and figures which follow to describe the impact of visitor expenditures on Lee County, both direct and total impacts are mentioned.

DIRECT IMPACTS

Economic benefits due directly to visitor expenditures.

For example, when visitor expenditures pay the salary and benefits for a hotel desk clerk, that amount would be considered in the direct impact for both jobs and income.

TOTAL IMPACTS

Total impacts are the sum of direct and indirect impacts.

Indirect impacts are the additional economic benefits supported during additional rounds of spending.

For example, the front desk clerk pays income tax and property tax which are an indirect result of visitor expenditures. The front desk clerk also pays his/her utility bills, buys food for his/her family, shops for gifts, etc. Those dollars create the indirect impact of the initial traveler expenditures through many additional rounds of spending in the economy.



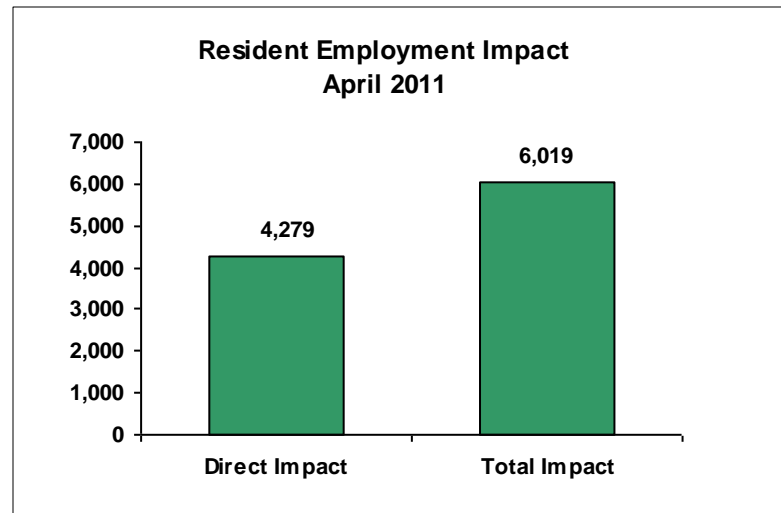
Impact on Jobs for Lee County Residents

In order to produce the output (food, lodging, entertainment, etc.) purchased by visitors, businesses have to employ people.

The number of jobs necessary to produce what is purchased with visitor expenditures is the employment impact of the visitor expenditures.

Direct employment includes the number of employees necessary to produce the direct output purchased with the visitor expenditures.

Total employment includes the number of employees necessary to produce the direct output purchased with the visitor expenditures PLUS the employees necessary to produce additional output purchased with the recirculation of money in Lee County. For example, wages paid to a hotel desk clerk are then used to purchase food and services for that employee, leading to additional supported jobs (grocery store proprietor, auto mechanic, etc.).





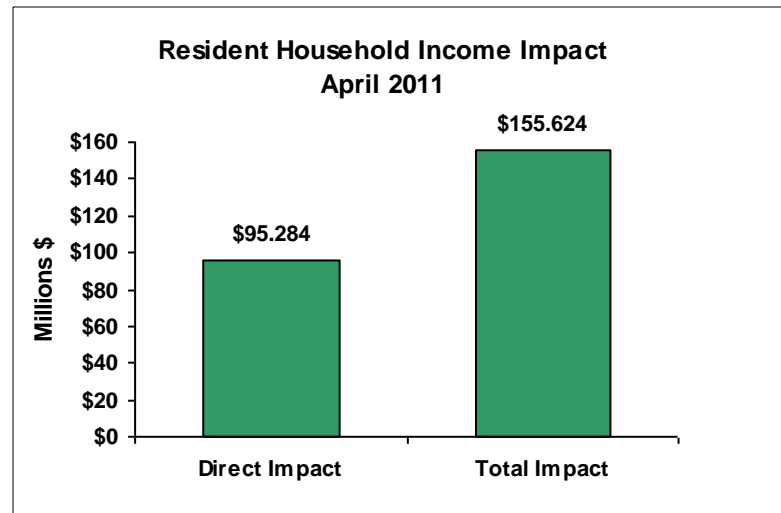
Impact on Household Income for Lee County Residents

As stated earlier, in order to produce the output (food, lodging, entertainment, etc.) purchased by visitors, businesses have to employ people. This requires business owners to pay wages and salaries to their employees, and also includes proprietary income for the business owner in some cases.

The wages and salaries paid in order to produce what is purchased with visitor expenditures is the household income impact of the visitor expenditures.

Direct household income impact includes the direct wages and salaries paid in order to produce the goods and services purchased with the visitor expenditures.

Total household income includes the wages and salaries paid in order to produce the goods and services purchased with the visitor expenditures PLUS the wages and salaries necessary to produce the additional output purchased with the recirculation of money in Lee County. For example, wages brought home by a hotel desk clerk are then used to purchase food and services for that person and his/her family, leading to additional wages and salaries being paid to others (grocery store employee, utility crews, etc.).





Impact on State and Local Government Revenues

In producing and selling any goods and services purchased by visitors, both local and state revenues are collected by local and state governments.

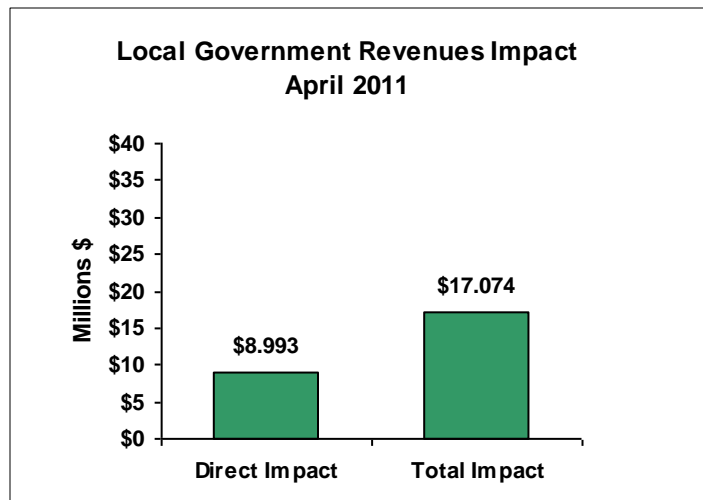
The gross government revenues accruing to governments as a result of producing the output purchased with visitor expenditures is the government revenue impact.

Local government revenue impact is a result of revenues provided to the local (Lee County) government. This includes the bed tax, local property tax, any local-option sales tax, and any operating income for local government agencies.

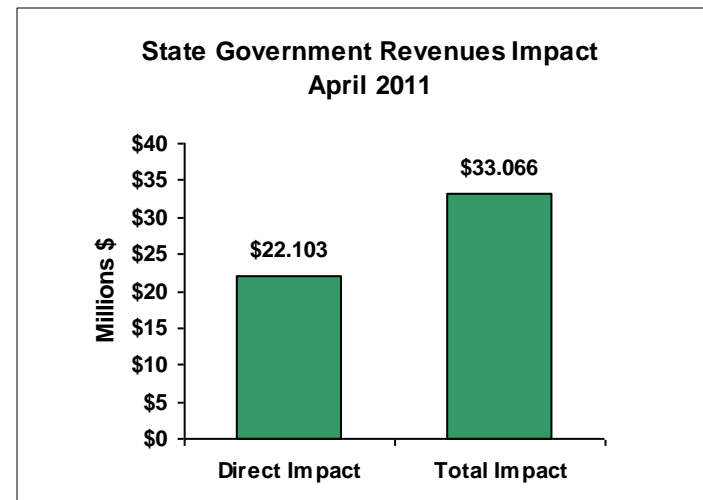
State government revenue impact is a result of revenues provided to the Florida state government. This includes sales tax and any operating income for state government agencies.

The following are included in government revenues as appropriate for the local area; gasoline taxes, vehicle licenses and registrations, boat registrations, hunting and fishing licenses, liquor taxes, local and state park user fees, etc.

Tax ratios used to calculate these government revenue impacts are adjusted to conform to data reported in State and Local Government Finance Data (SLGF, Bureau of the Census).



April 2011



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Appendix April 2011



April 2011 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Bonita Springs	Bonita Beach	2-Apr	25
Sanibel	Holiday Inn	5-Apr	7
Sanibel	Lighthouse Beach	5-Apr	24
Fort Myers Beach	Estero Island Beach Club	7-Apr	10
Fort Myers Beach	Diamond Head Resort	8-Apr	12
Fort Myers Beach	The Pier	8-Apr	14
Cape Coral	Cape Coral Yacht Club	15-Apr	10
Ft. Myers	Clarion	21-Apr	6
Ft. Myers	Edison Estates	21-Apr	26
Ft. Myers	Centennial Park	22-Apr	6
North Ft. Myers	Shell Factory	22-Apr	8
Fort Myers Beach	Best Western	23-Apr	10
Fort Myers Beach	Cane Palm	23-Apr	6
Fort Myers Beach	Winward Passage	23-Apr	6
Ft. Myers	Summerlin Square Trolley	23-Apr	10
Sanibel	Casa Ybel	28-Apr	5
Sanibel	Loggerhead Cay	28-Apr	5
Sanibel	Pelican Roost	28-Apr	8
Sanibel	Sundial Resort	28-Apr	8
TOTAL			206



Occupancy Interviewing Statistics

Interviews were conducted from May 1 – May 15, 2011. Information was provided by 120 Lee County lodging properties.

Lodging Type	Number of Interviews
Hotel/Motel/Resort/B&Bs	74
Condo/Cottage/Vacation Home/Timeshare	28
RV Park/Campground	18
Total	120