The Beaches of Fort Myers and Sanibel Tourist Development Council

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STR

March 15, 2013

Agenda

1. The big picture

2. Fort Myers market
   - Segment performance
   - Comparables
   - Day of week overview
   - Submarket performance

3. Industry outlook

Total US - Key Statistics
12-Months Ending January 2013

		% Change
• Hotels	51.0 k	
• Room Supply	1.8 bn	0.5%
• Room Demand	1.1 bn	3.0%
• Occupancy	61.5%	2.5%
• ADR	$106.47	4.3%
• RevPAR	$65.53	6.8%
• Room Revenue	$116.0 bn	7.4%

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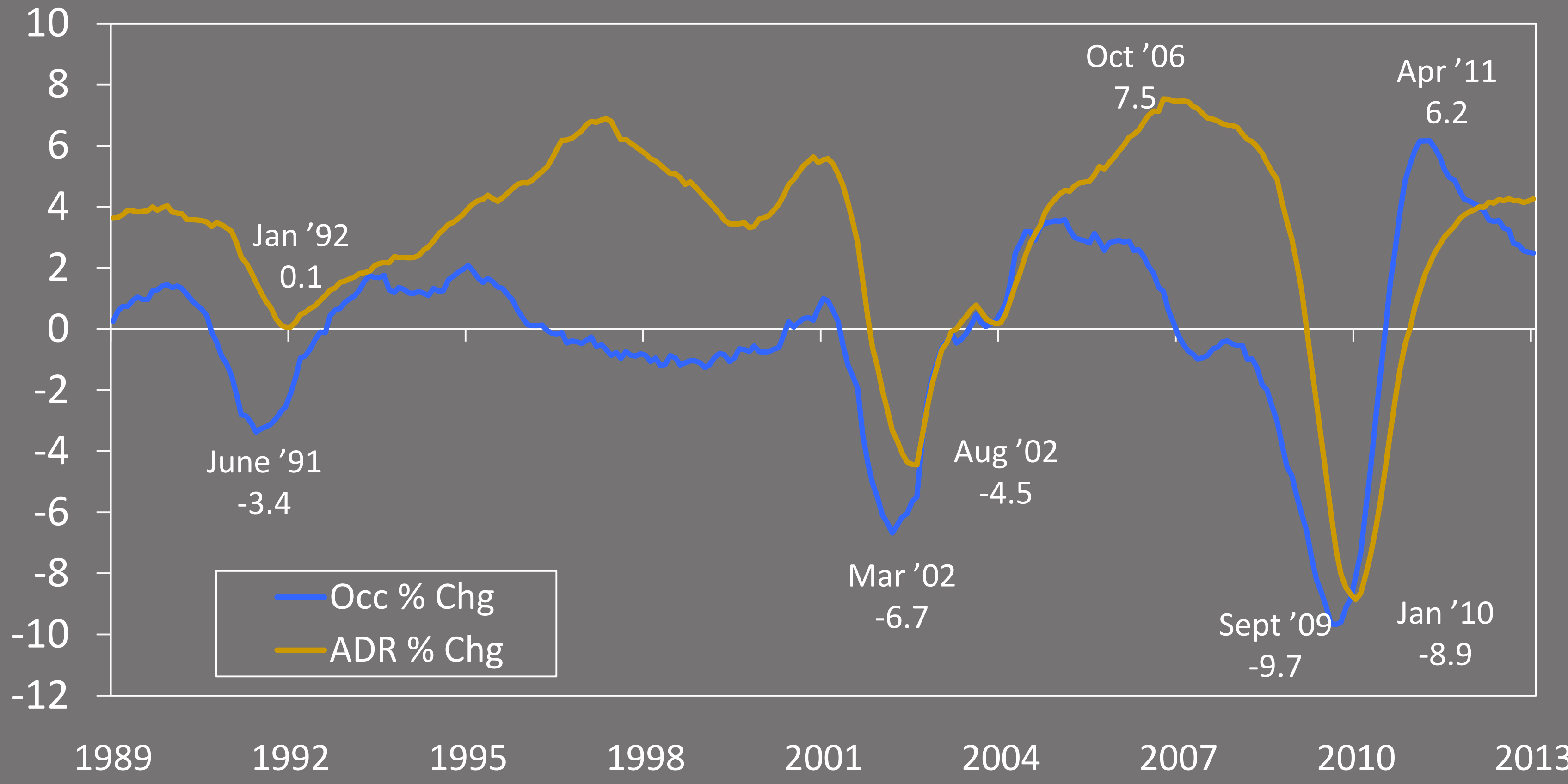
Total United States

Occupancy/ADR Percent Change

Twelve Month Moving Average – 1989 to January 2013



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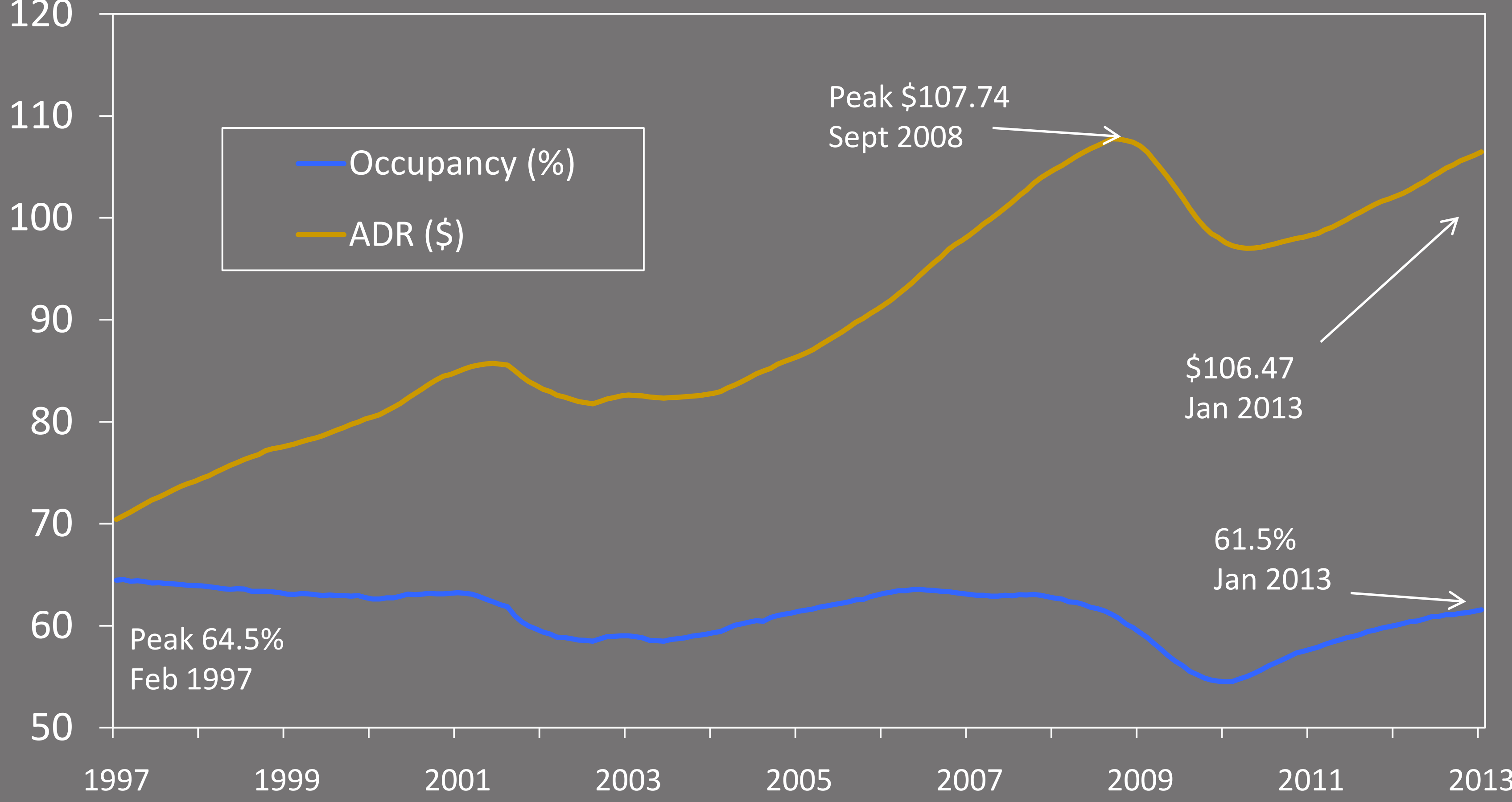
Total United States

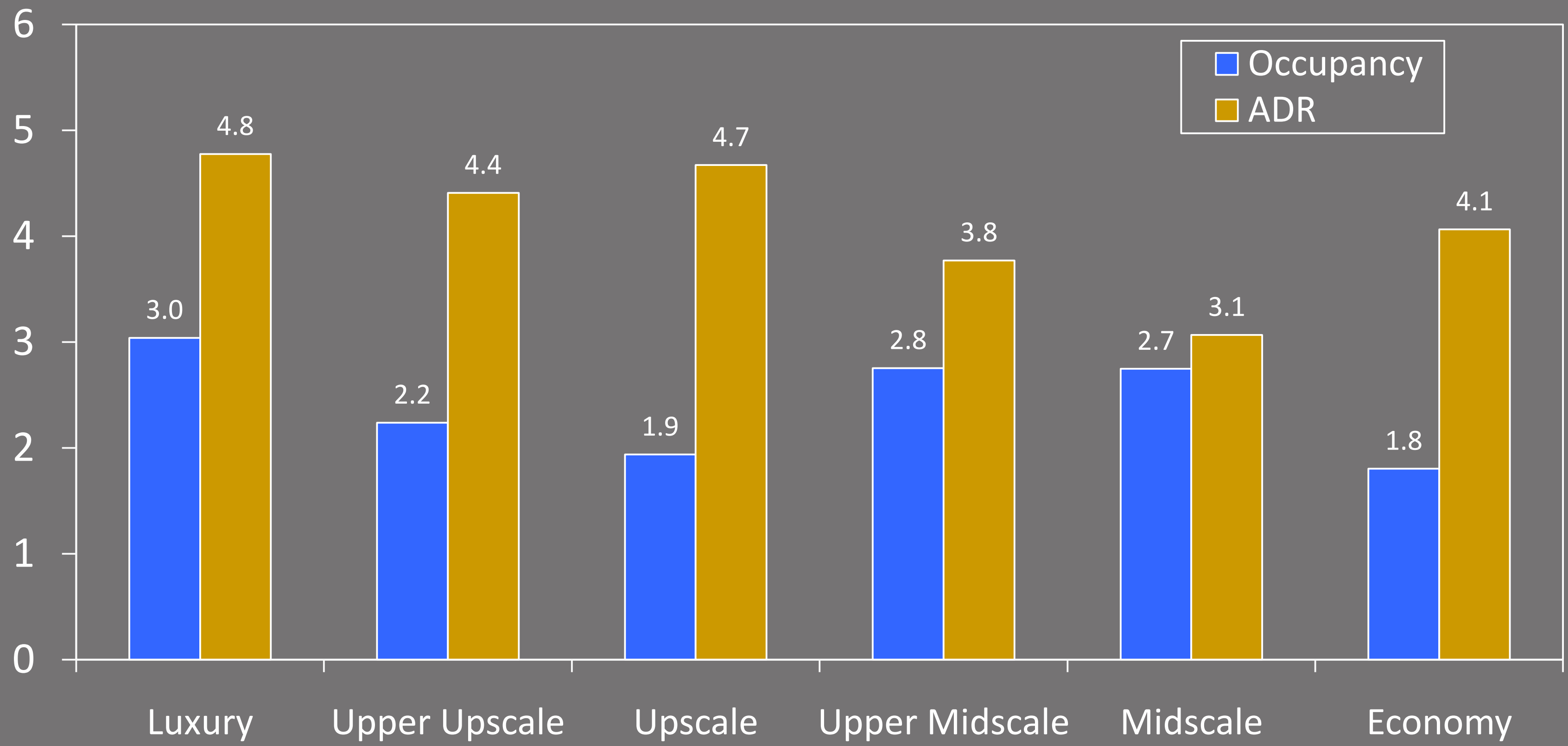
Occupancy and ADR

Twelve Month Moving Average – January 2013



Chain Scales

Occupancy / ADR Percent Change
Twelve Months Ended January 2013



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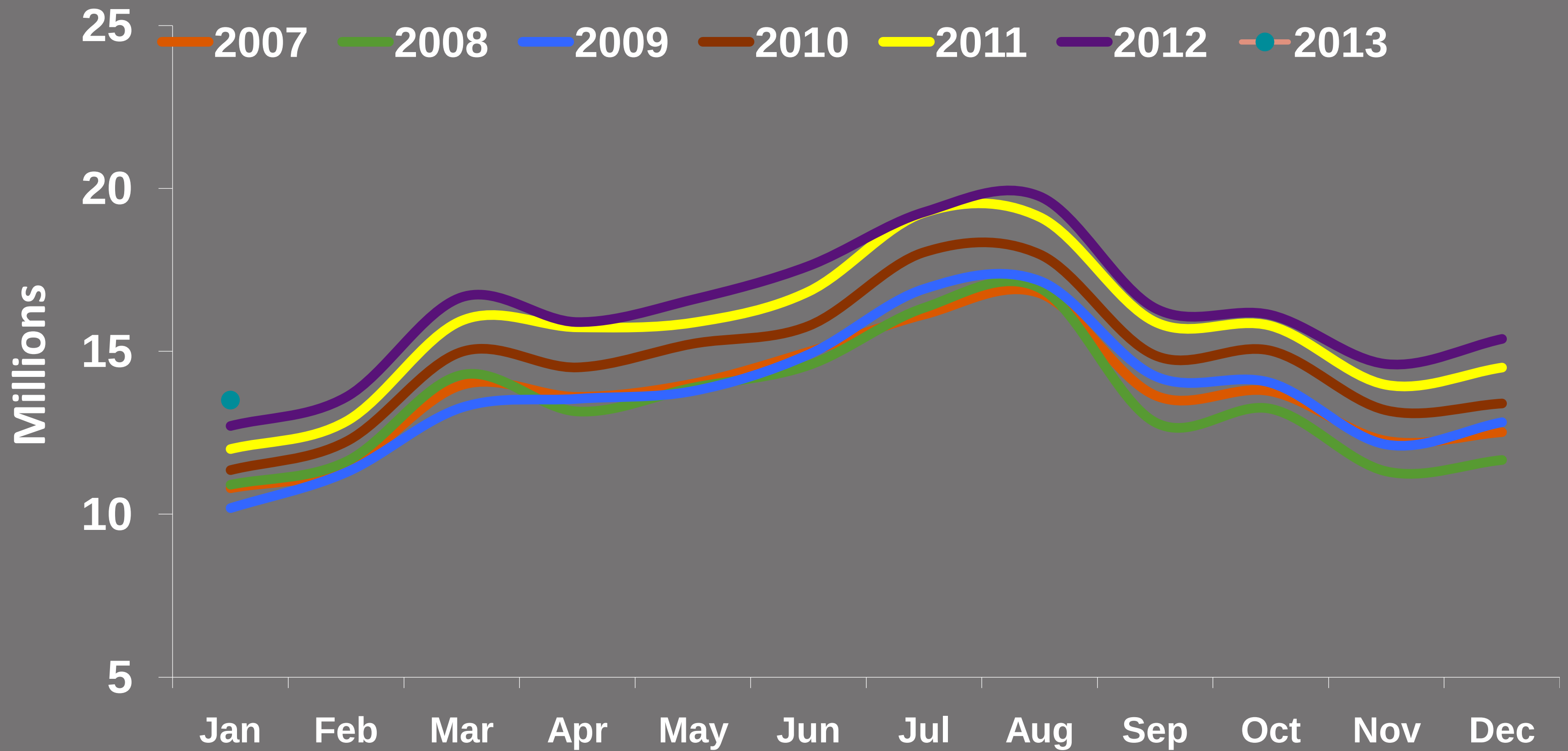
Total United States

Monthly Transient Demand
2007 Through January 2013



NOTE: Data is for upper tier hotels only (luxury chains, upper upscale chains, and upper tier independent hotels).

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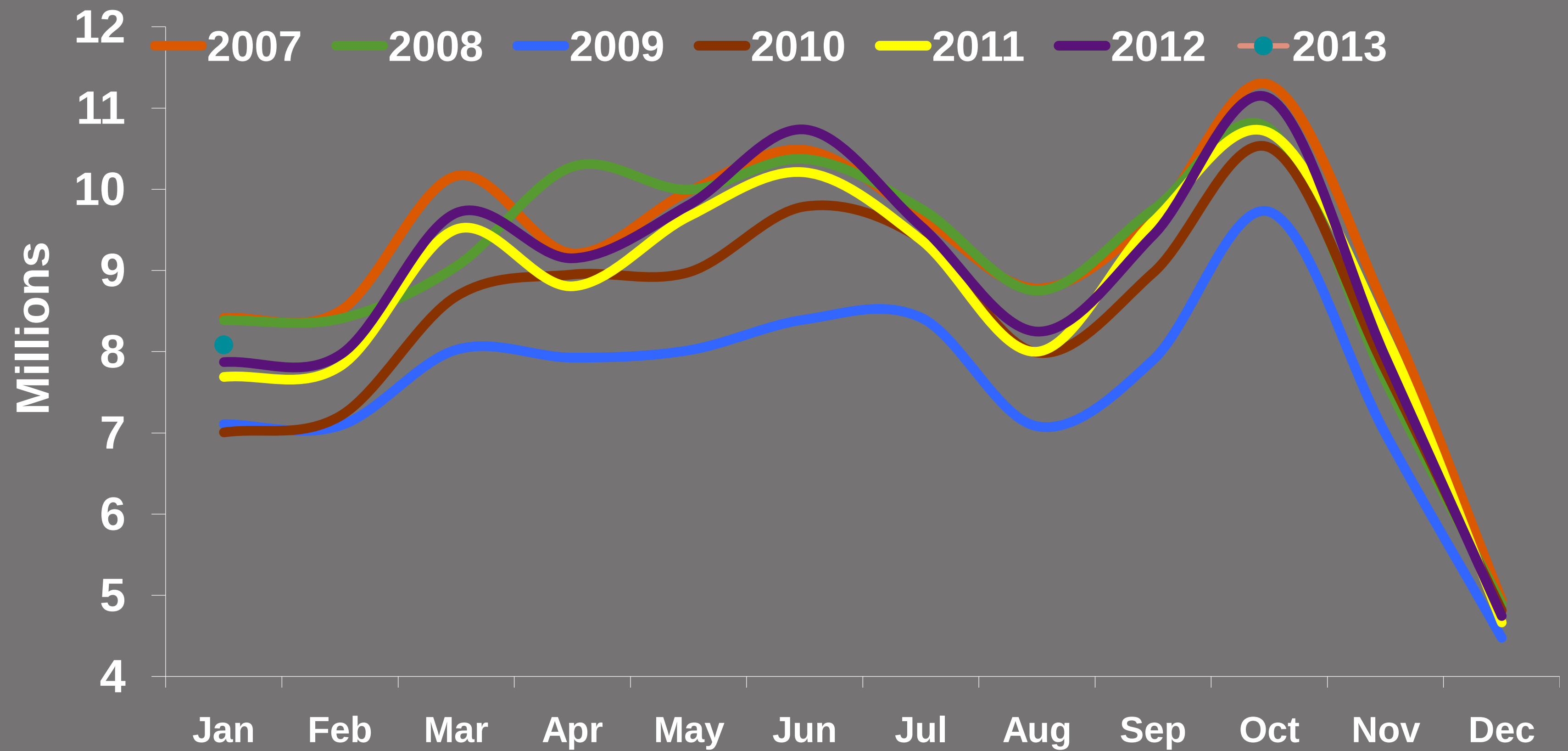
Total United States

Monthly Group Demand
2007 Through January 2013



NOTE: Data is for upper tier hotels only (luxury chains, upper upscale chains, and upper tier independent hotels).

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Fort Myers Market Overview

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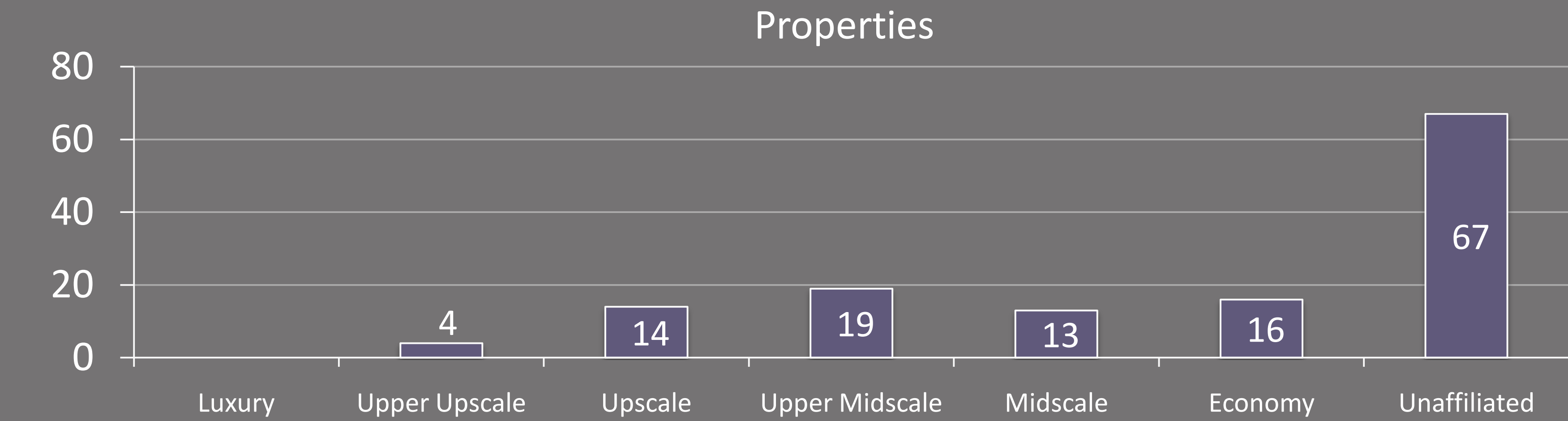
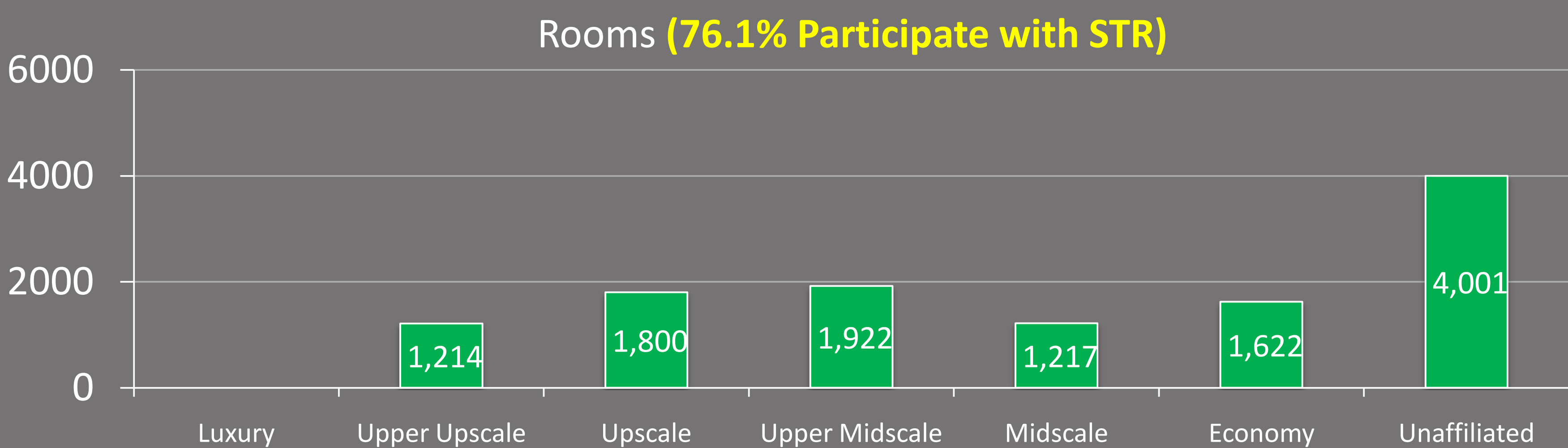
Current Fort Myers Hotel Stock

Jan. 2012





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Current Fort Myers Pipeline

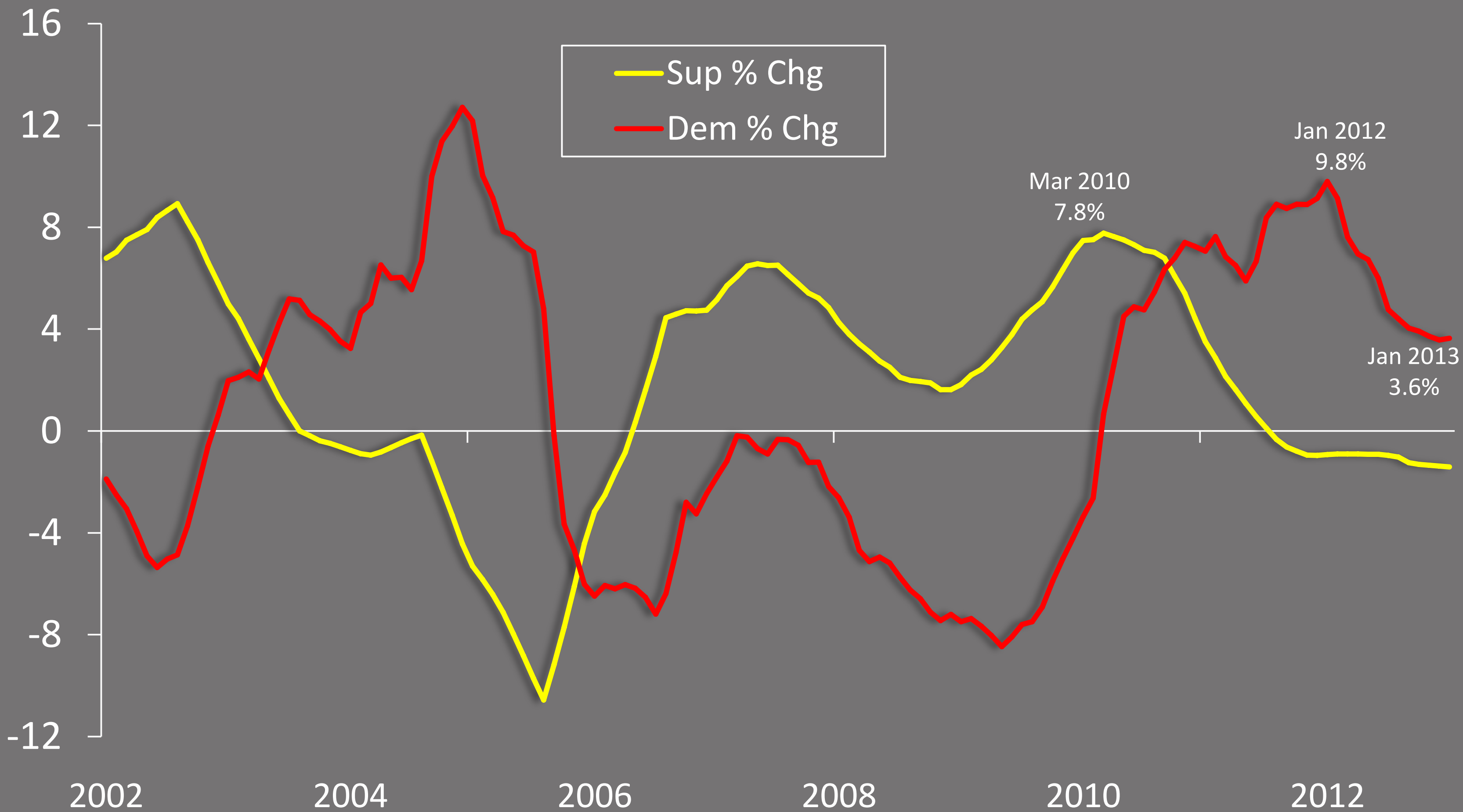
Jan. 2012

- In Construction: 0
- Final Planning stages: 0
- Planning stages: 3 hotels

Fort Myers, FL Market

Supply/Demand Percent Change

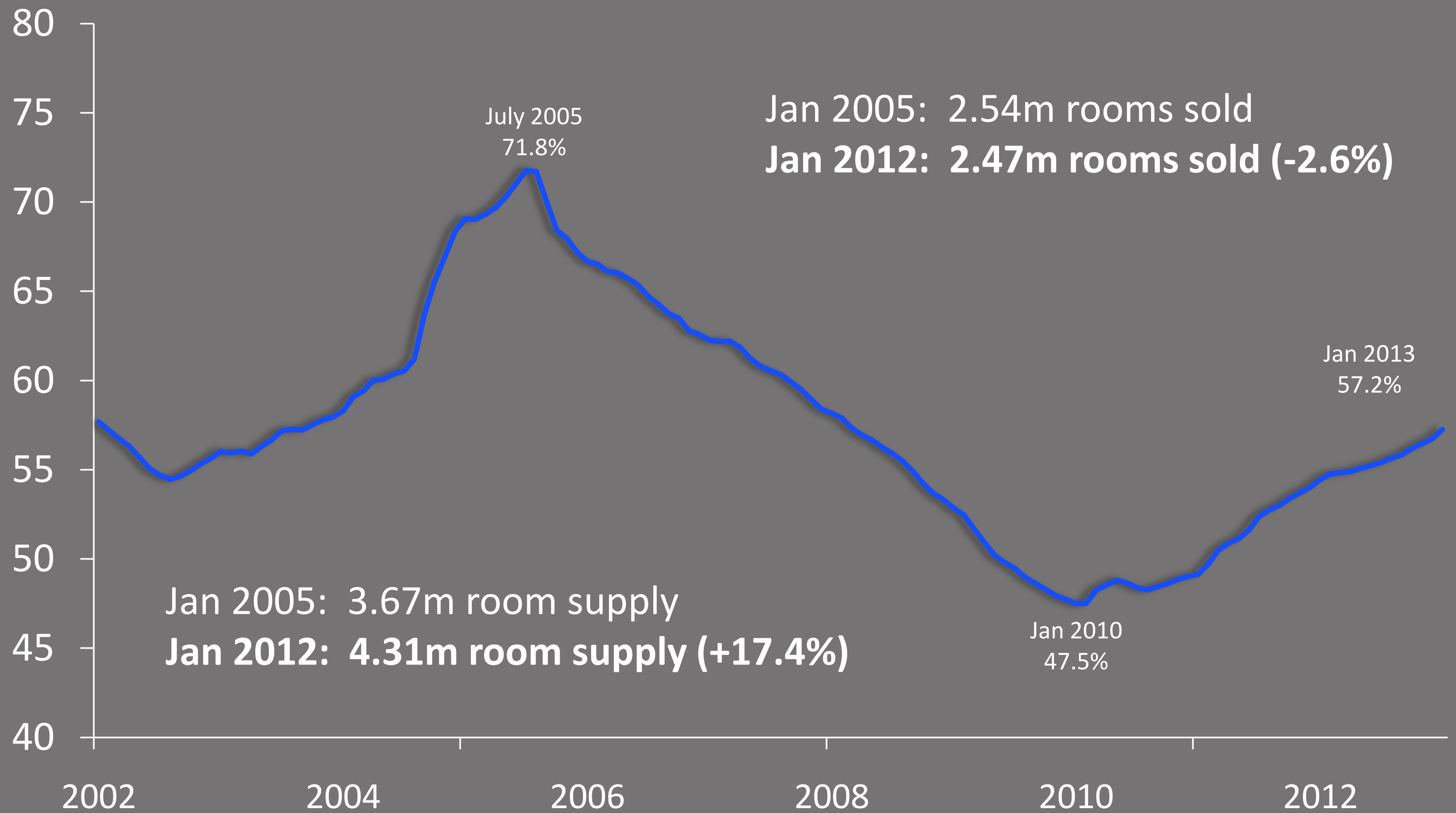
Twelve Month Moving Average – 2002 to January 2013



Fort Myers, FL Market

Occupancy Percent

Twelve Month Moving Average – 2002 to January 2013



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Fort Myers, FL Market

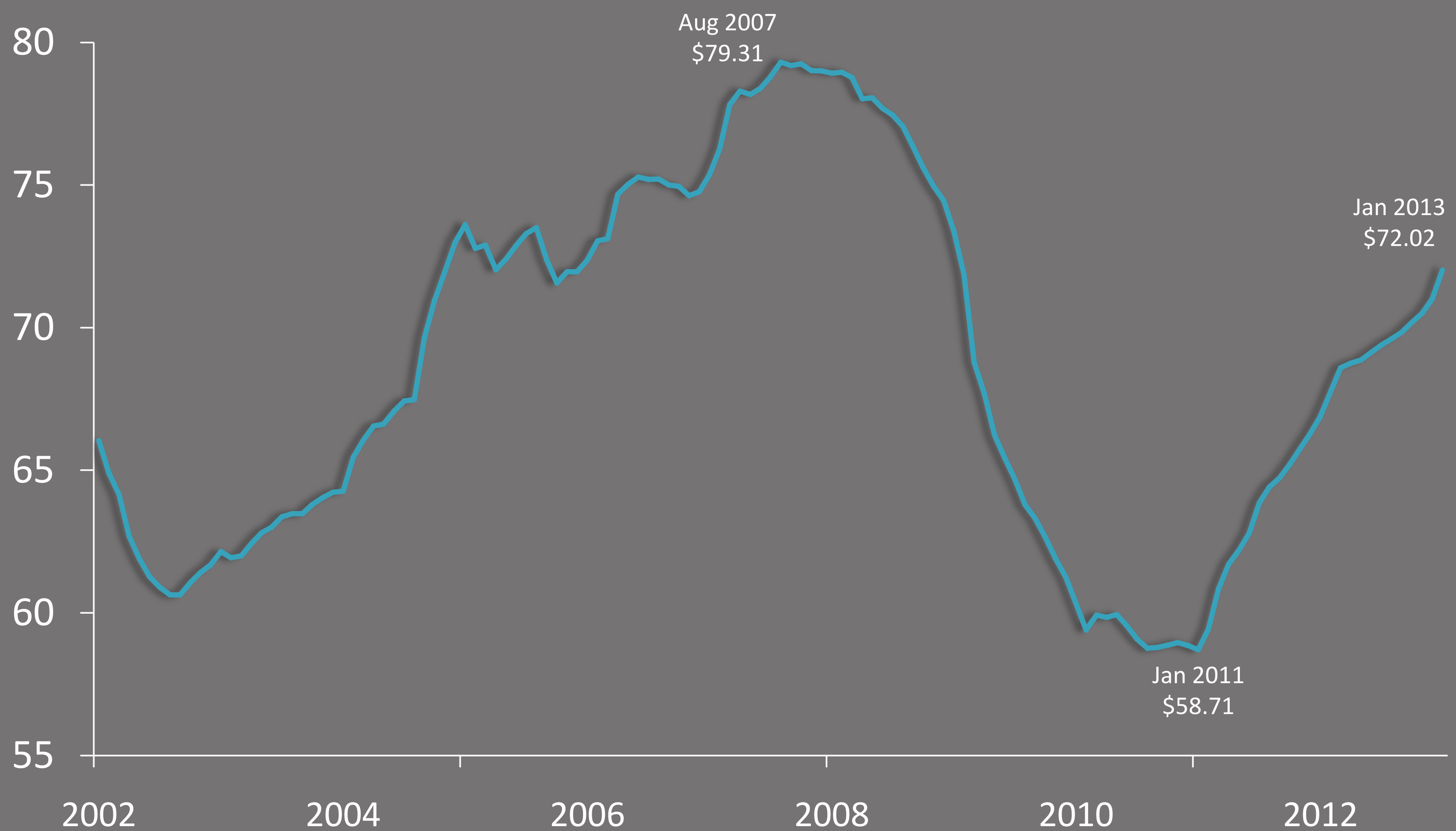
ADR ($)

Twelve Month Moving Average – 2002 to January 2013

Fort Myers, FL Market

RevPAR ($)

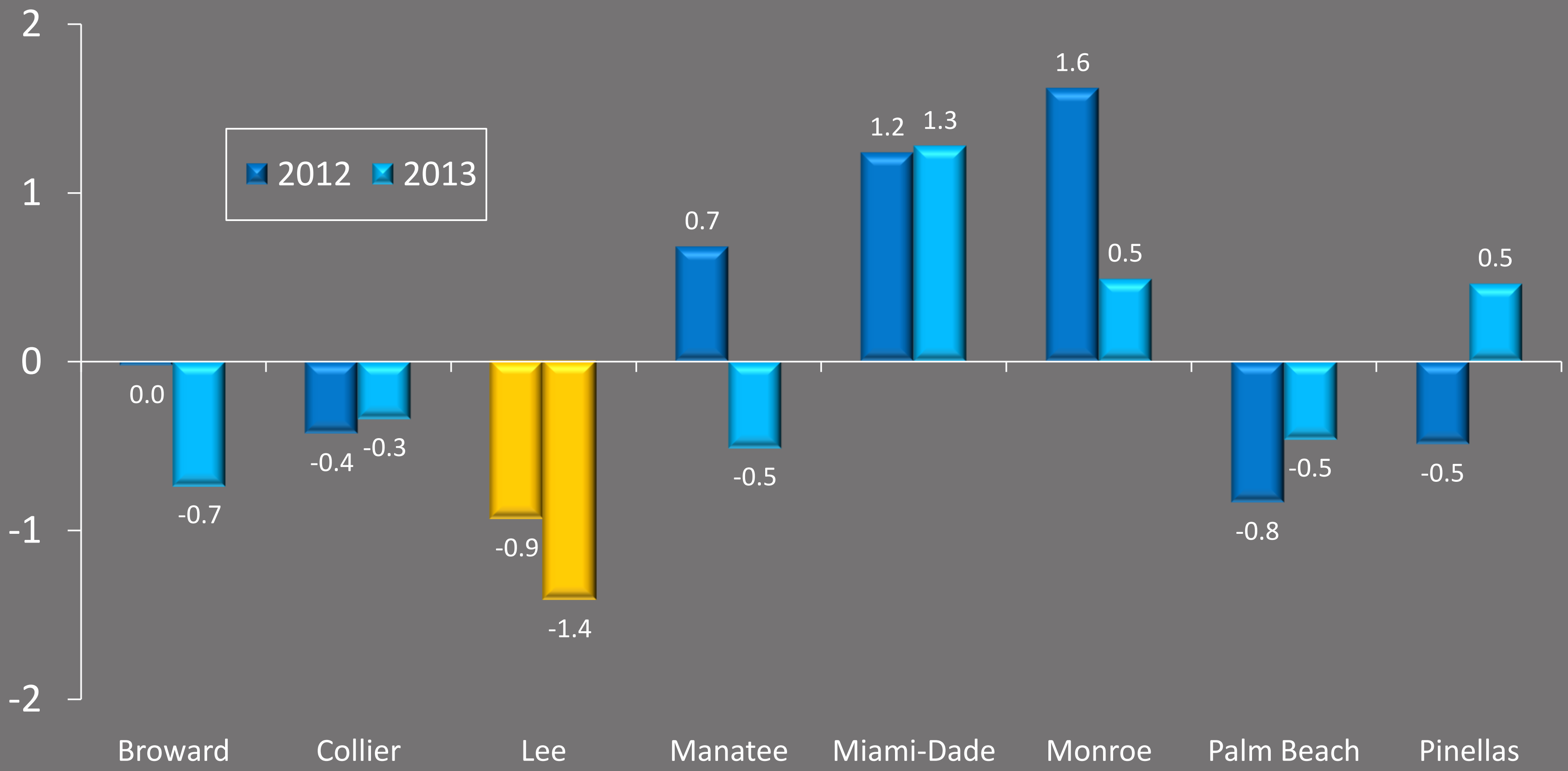
Twelve Month Moving Average – 2002 to January 2013



Lee County vs. Competitive Counties

Supply Percent Change

Twelve Months Ended January, 2012 vs. 2013



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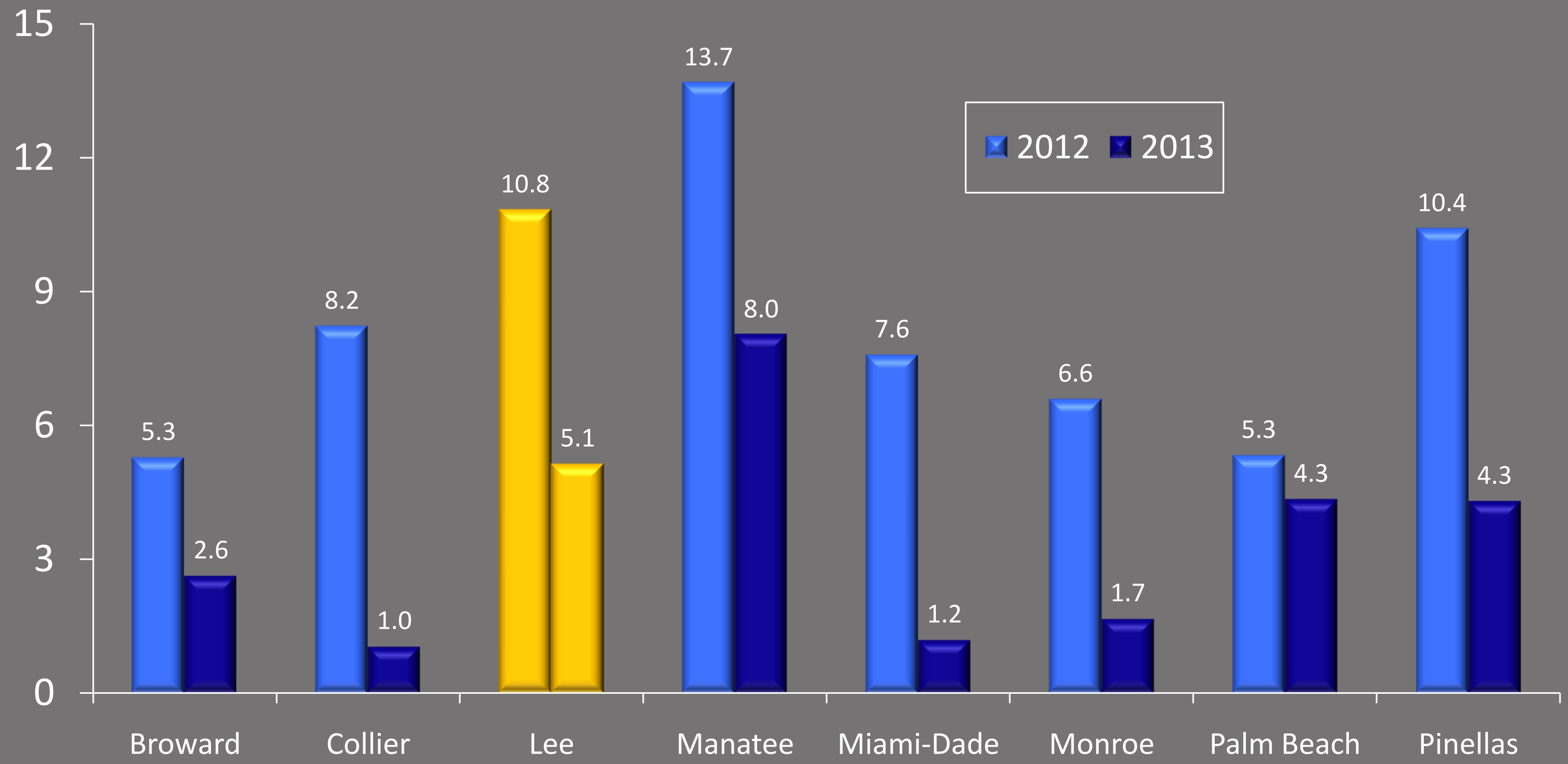
Lee County vs. Competitive Counties

Occupancy Percent Change

Twelve Months Ended January, 2012 vs. 2013



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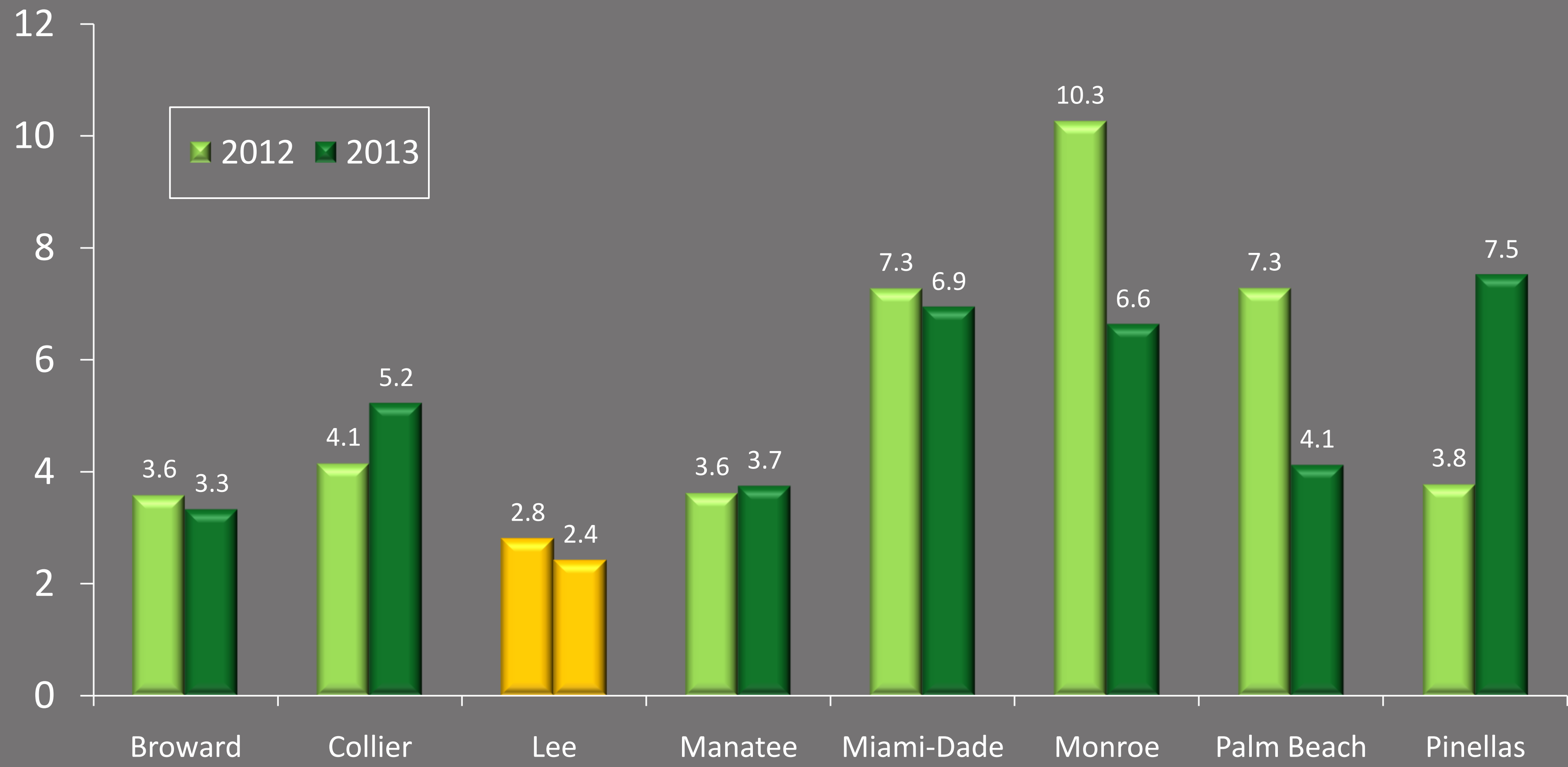
Lee County vs. Competitive Counties

ADR ($) Percent Change

Twelve Months Ended January, 2012 vs. 2013



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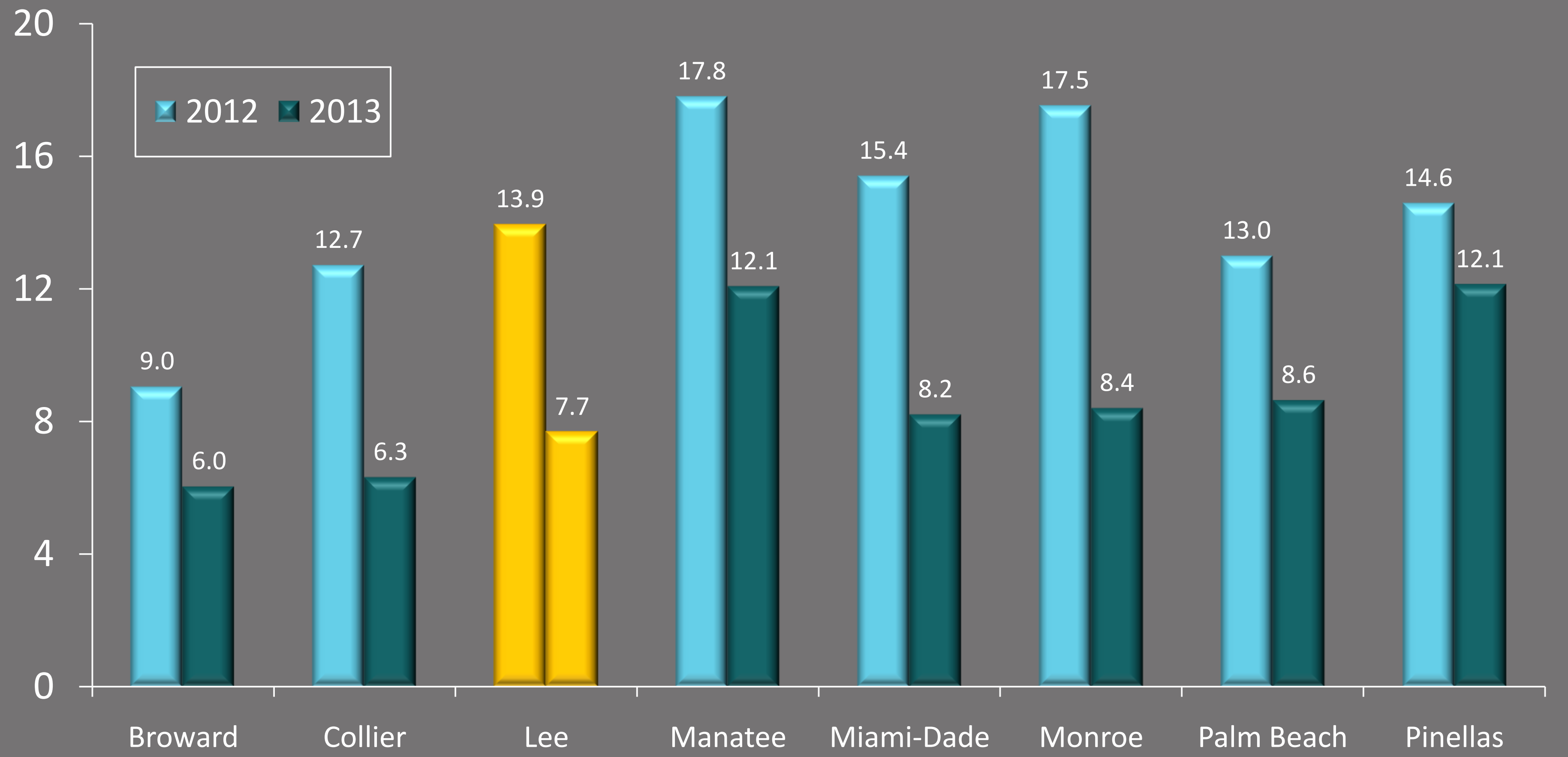
Lee County vs. Competitive Counties

RevPAR ($) Percent Change

Twelve Months Ended January, 2012 vs. 2013



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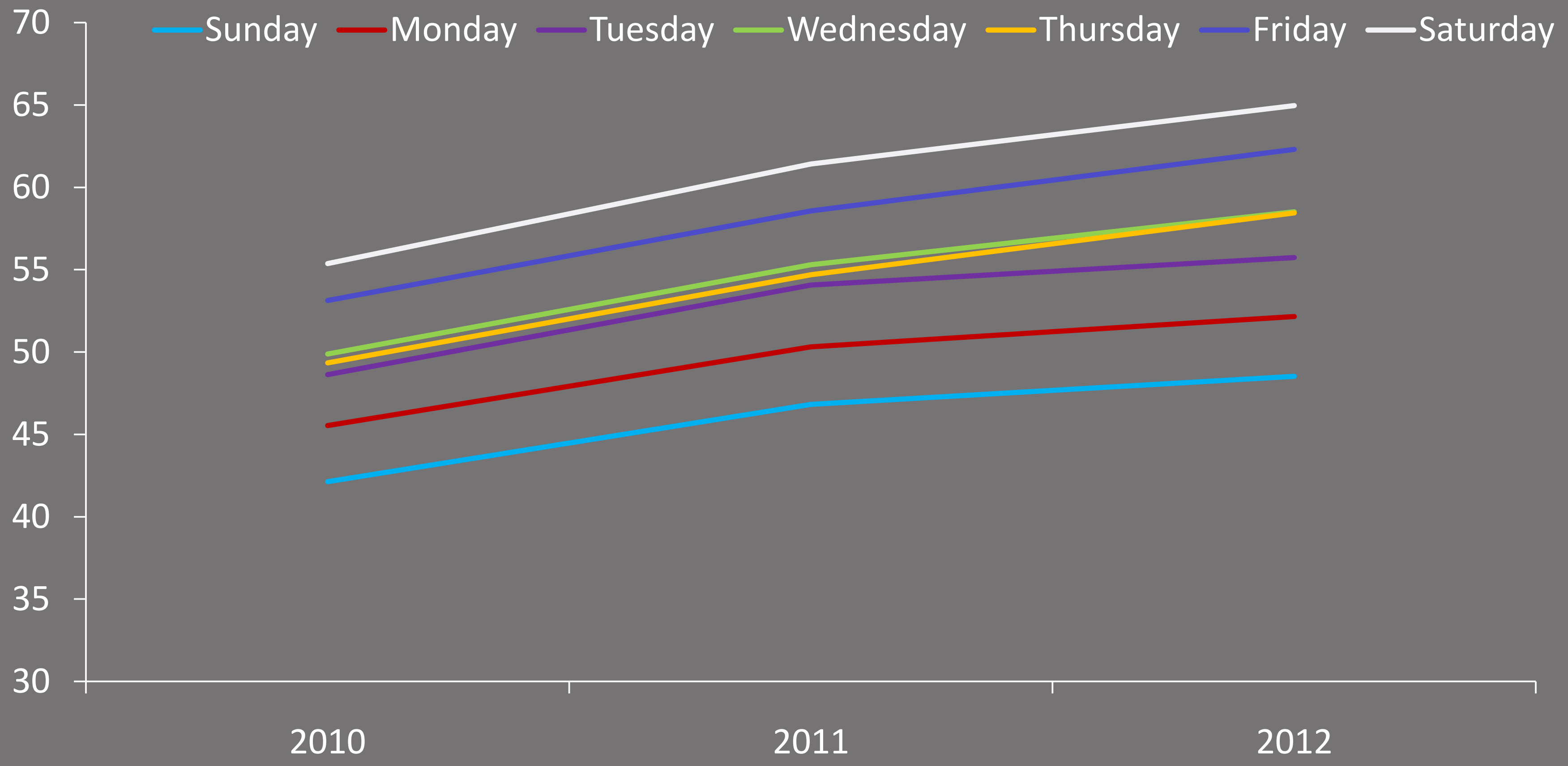
Fort Myers, FL Market

Day of Week Occupancy

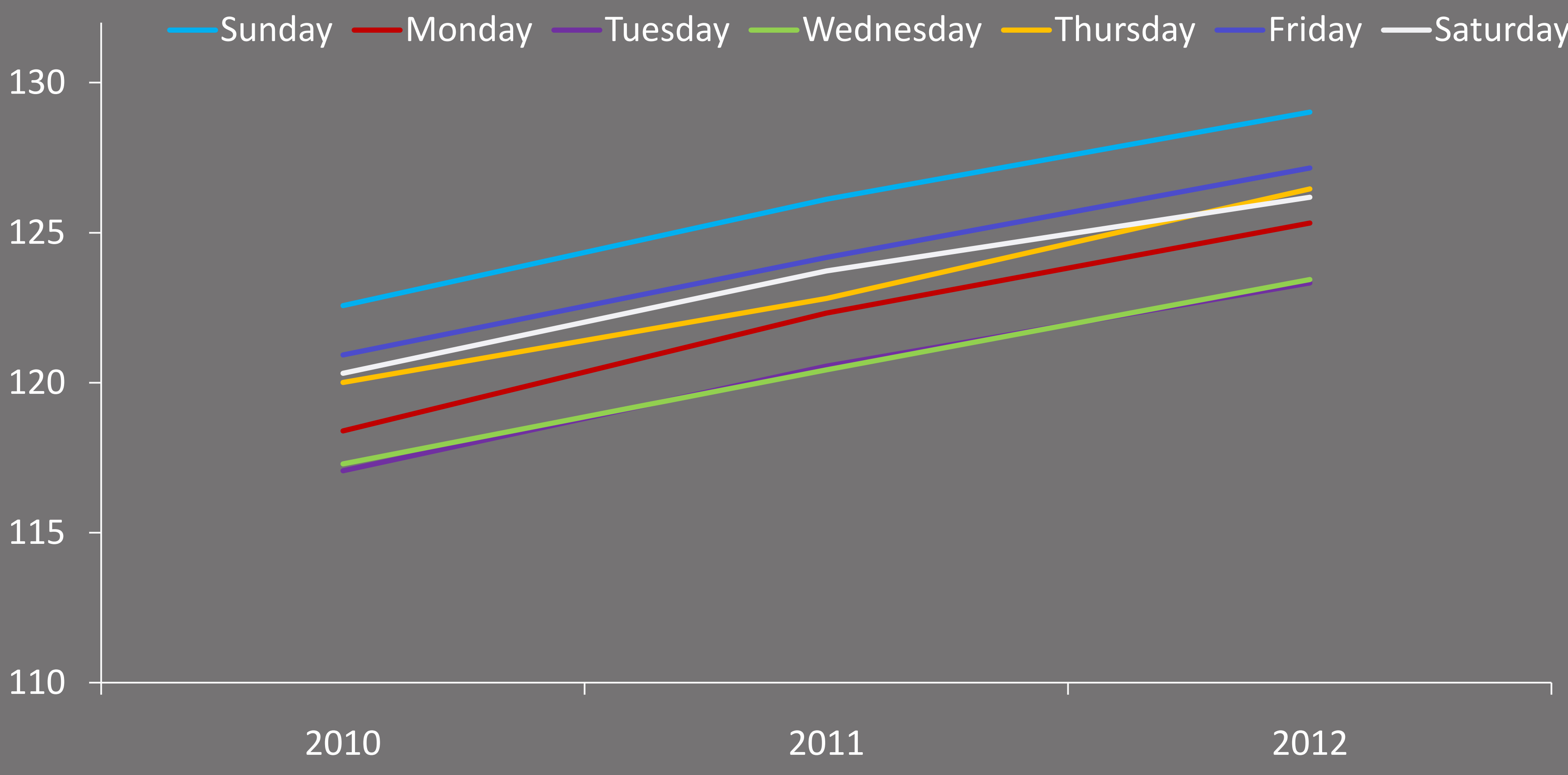
Annual 2010-current



Fort Myers, FL Market

Day of Week ADR

Annual 2010-current



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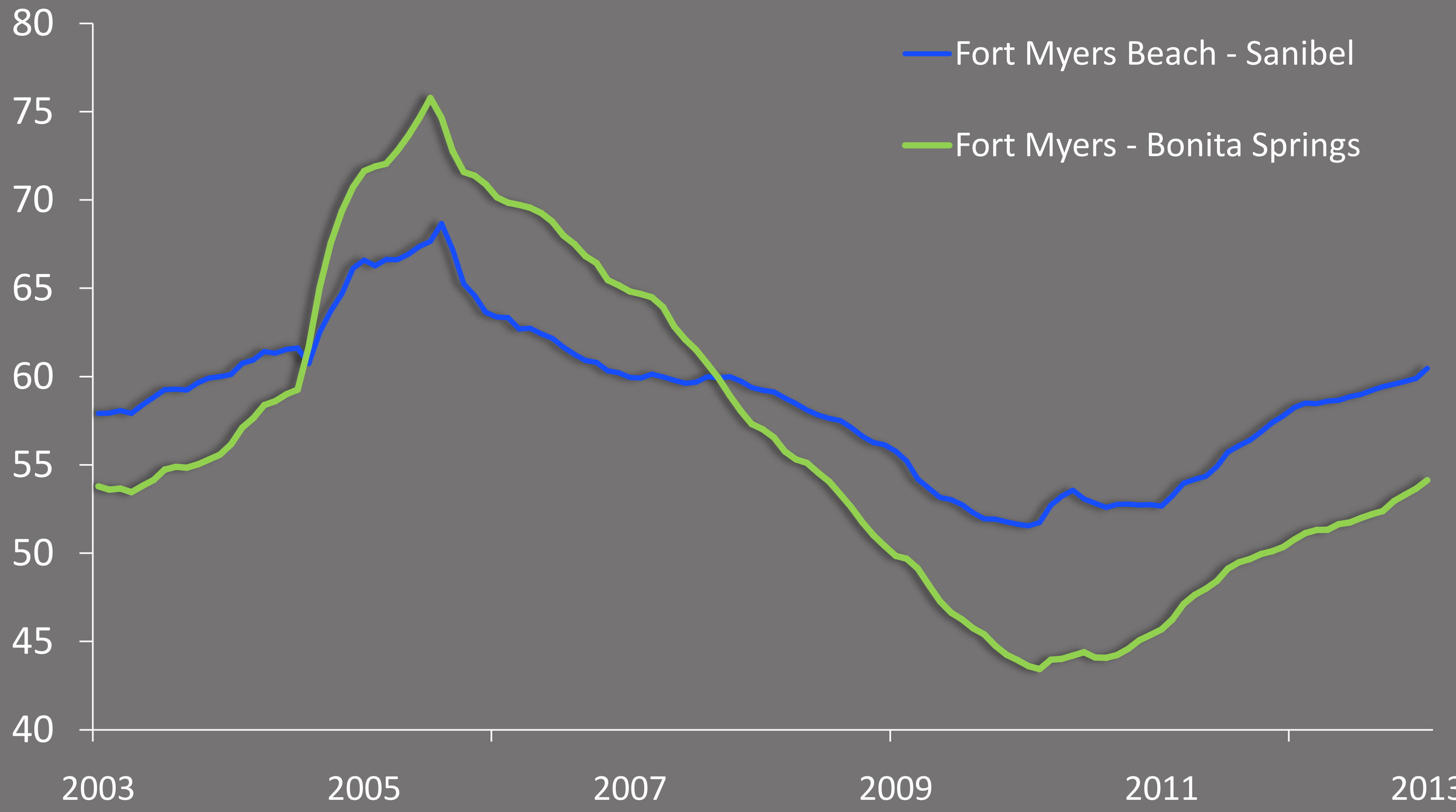
Fort Myers Submarkets

Occupancy Percent

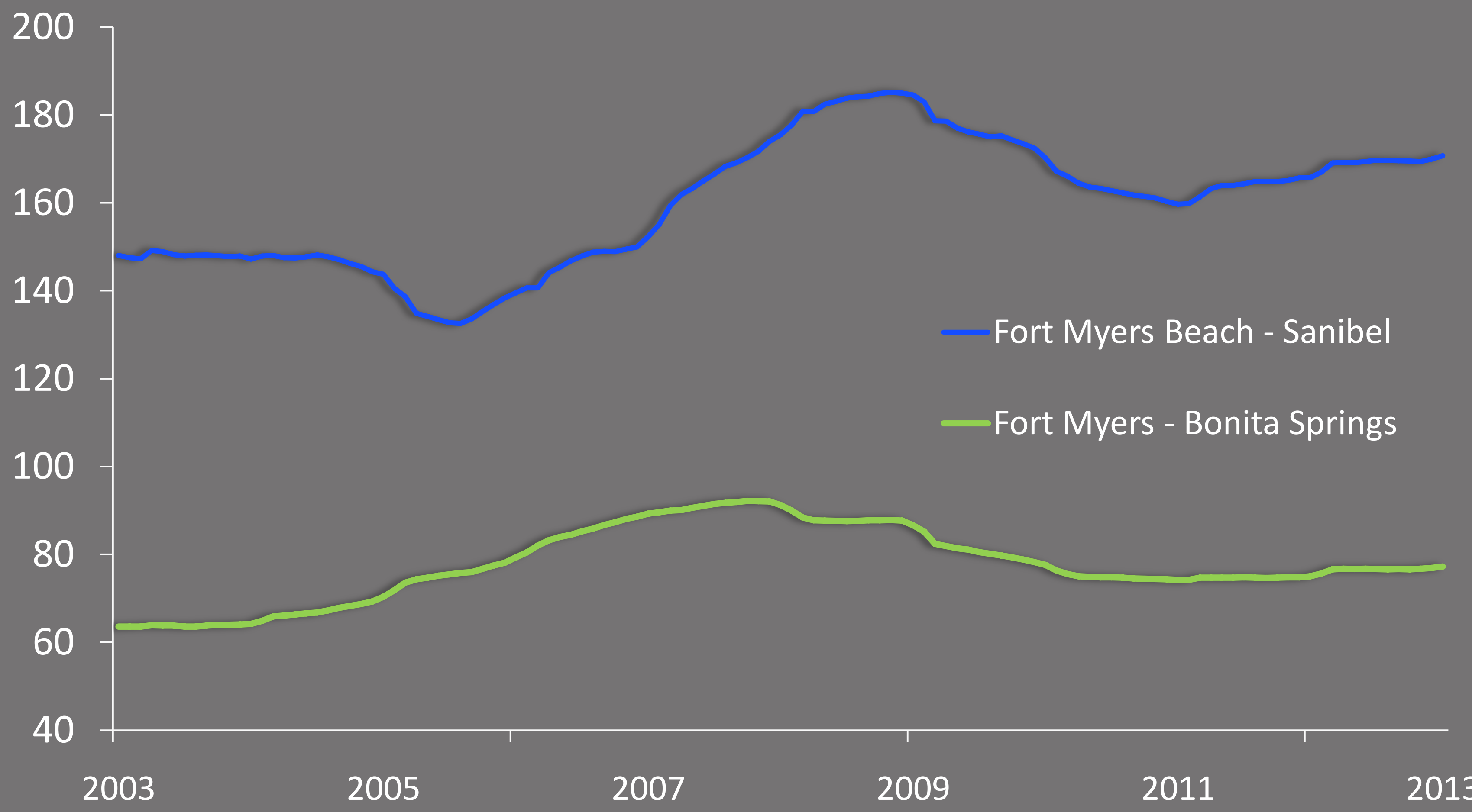
Twelve Month Moving Average – 2003 to January 2013



Fort Myers Submarkets

ADR

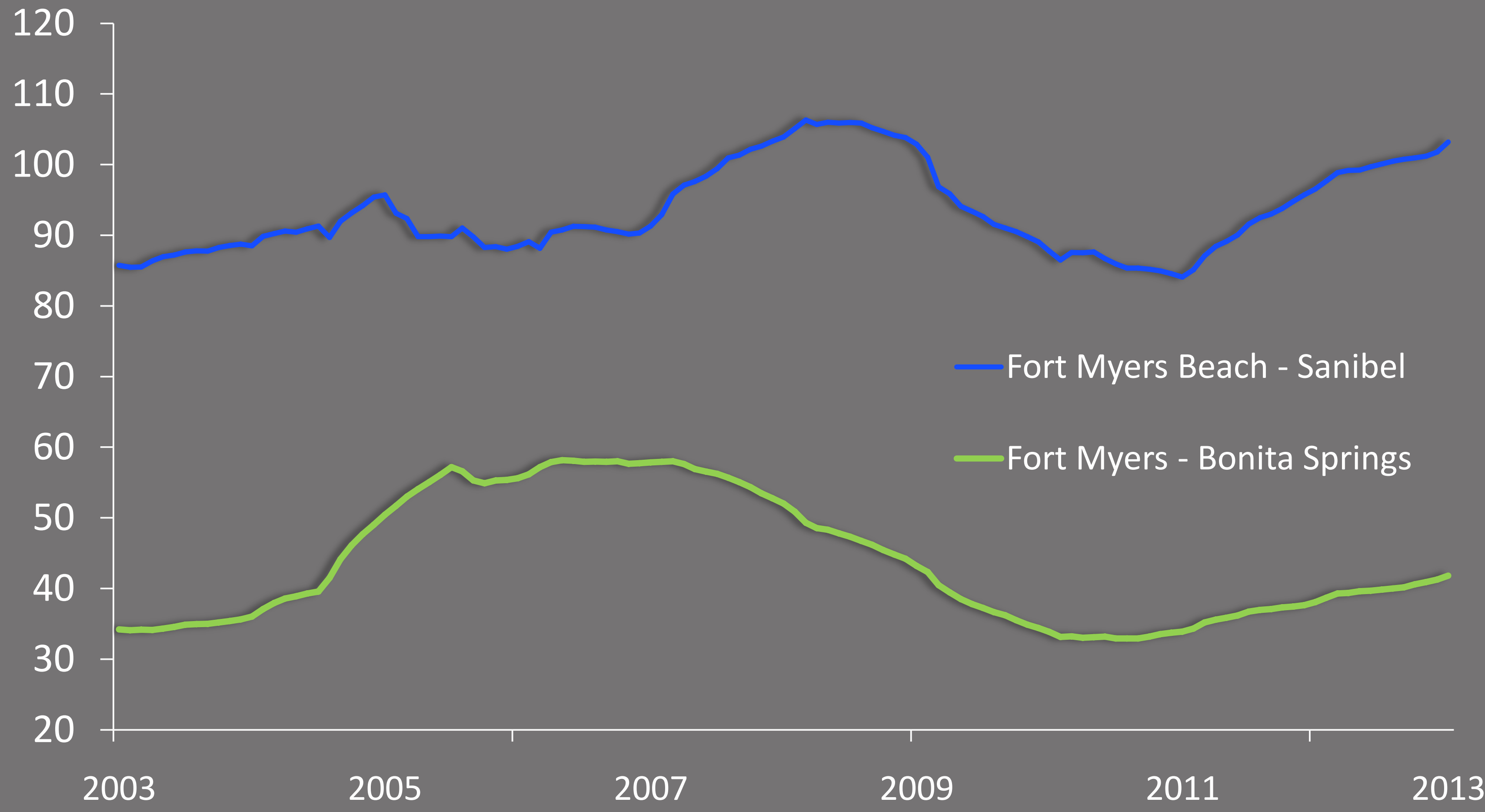
Twelve Month Moving Average – 2003 to January 2013



Fort Myers Submarkets

RevPAR

Twelve Month Moving Average – 2003 to January 2013



Total United States
Key Performance Indicator Outlook (% Change vs. Prior Year)
2013 - 2014

Outlook		
	2013 Forecast	2014 Forecast
Supply	1.0%	1.5%
Demand	1.8%	2.8%
Occupancy	0.8%	1.3%
ADR	4.9%	4.6%
RevPAR	5.7%	6.0%

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