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

January 2012 Visitor Profile and Occupancy Analysis
March 16, 2012

Prepared for:

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

Prepared by:

Executive Summary
January 2012

Throughout this report, statistically significant differences between responses for 2011 and 2012 at the 95% confidence level are noted with an A,B lettering system.

For example:

2010 A	2011 B
60%	70%A

In the table above 70% in Column B is statistically greater than 60% in Column A.

Executive Summary

Visitation

- During the month of January 2012, Lee County hosted more than 172,000 visitors staying in paid accommodations and about 207,000 staying with friends or relatives while visiting, for a total of 380,010 visitors. The total number of visitors during January 2012 was somewhat lower than the prior year (-3.5%) – a result of decreases in visitation among both paid accommodation visitors (-2.8%) and those staying with friends or relatives (-4.2%).

- As is typical, the majority of January 2012 visitors staying in paid accommodations were U.S. residents (75%). Lee County experienced a notable increase in the estimated number of international visitors staying in paid accommodations when compared with January 2011. Canadians and Germans made up the greater part of these international visitors.

- Similar to last January, half of January 2012 domestic paid accommodations guests came from the Midwest (52%). Almost one-quarter are from the Northeast (23%) and far fewer from the South (12%) and West (7%). Minneapolis was the top domestic feeder market (11%) followed by Boston (7%) and Indianapolis (6%).

Visitor Expenditures

- January 2012 visitors spent an estimated $250.8 million during their stay. As a consequence of a decline in the number of visitors, total spending dropped by 13.1% versus January 2011 ($288.5 million). Paid accommodations guests contributed $173.1 million to the total – a 10% decrease year-over-year but still higher than levels observed in 2010. Estimated spending among visitors staying with friends or relatives was down even more year-over-year (-19.3%).

Total January Visitation					
	%		Visitor Estimates		% Change 2011-2012
	2011	2012	2011	2012	
Paid Accommodations	45%	45%	177,744	172,831	-2.8%
Friends/Relatives	55%	55%	216,230	207,179	-4.2%
Total Visitation			*393,974*	*380,010*	-3.5%
January Visitor Origin - Visitors Staying in Paid Accommodations					
	2011	2012	2011	2012	
United States	84%	75%	148,353	128,997	-13.0%
Canada	12%	9%	20,993	16,281	-22.4%
Germany	-	8%	-	13,776	-
UK	1%	2%	1,400	3,757	168.5%
France	-	1%	-	2,505	-
Austria	-	1%	-	1,252	-
BeNeLux	-	1%	-	1,252	-
Latin America	1%	1%	1,400	1,252	-10.5%
Ireland	1%	-	1,400	-	-
Scandinavia	1%	-	1,400	-	-
Other	1%	2%	1,400	3,757	168.5%
No Answer	1%	-	1,400	-	-
U.S. Region (Paid Accommodations)					
	2011	2012	2011	2012	
Florida	1%	-	1,400	-	-
South (including Florida)	11%	12%	16,795	15,029	-10.5%
Midwest	51%	52%	75,576	67,630	-10.5%
Northeast	25%	23%	36,389	30,058	-17.4%
West	1%	<7%>	1,400	8,767	526.4%
No Answer	<12%>	6%	18,194	7,514	-58.7%

2012 Top DMAs (Paid Accommodations)		
Minneapolis-Saint Paul	11%	13,776
Boston (Manchester, NH)	7%	8,767
Indianapolis	6%	7,514
Philadelphia	5%	6,262
Detroit	4%	5,010
New York	4%	5,010
Cincinnati	3%	3,757
Grand Rapids-Kalamazoo-Battle Creek	3%	3,757
Louisville	3%	3,757
South Bend-Elkhart	3%	3,757

On this page < > indicates a significant differences between responses for 2011 and 2012 at the 95% confidence level.

Trip Planning

- January 2012 visitors tended to have a longer lead-time for trip planning with the majority of visitors talking about, choosing, and making reservations three months or more before their trip – not unlike January 2011 visitors:
    - 73% of January 2012 started talking about trip (vs. 67% January 2011)
    - 68% of January 2012 chose Lee County for trip (vs. 61% January 2011)
    - 49% of January 2012 made lodging reservation (vs. 48% January 2011)

- Almost all January 2012 visitors claim to access destination planning information online using a computer or a portable Internet device. Two-thirds said they *typically* use a laptop computer to access this information (64%) and half a desktop computer (52%), while one-quarter use their Smartphone (26%) and somewhat fewer use a tablet device (15%).

- With the Internet at their disposal, visitors are effectively operating as their own travel agents. Many of these visitors noted that they consulted one or more websites while planning their January 2012 trip to Lee County. Visitors most often mentioned employing the use of airline websites, with 40% claiming to do so. One-quarter said they used booking or hotel websites (25% and 24% respectively) and 20% the VCB website. Additionally, one-third stated they used search engines (33%) to aid in their planning.

- When talking about coming to Lee County, the attributes that received the highest ratings among January 2012 visitors with regard to influencing their selection were: *warm weather* (97%), *peaceful/relaxing* (90%), and *white sandy beaches* (89%) – trademarks of the Lee County experience.

Visitor Profile

- The majority of January 2012 visitors arrived by plane when traveling to the area (69%). In contrast, not quite half of January 2011 visitors claimed that they flew (44%), which was an atypically low proportion. Southwest Florida International Airport was the entry point for most visitors traveling by air (83%).

- Lee County continued to attract a high proportion of repeat visitors in January (78% both years). January 2012 visitors were more likely than their 2011 counterparts to say the came to the Lee County area for a vacation (91% vs. 79% January 2011) and less likely to say they were in the area visiting friends or relatives (21% vs. 32% January 2011). Similarly, the incidence of those reporting they were staying at the home of family/friends for their overnight accommodations was lower.

Visitor Profile (cont'd)

- Half of visitors interviewed indicated they were staying in condo/vacation home properties (49%) during their trip. A sizable minority indicated they were staying in a hotel/motel/resort for their lodging (38%). Only one in ten mentioned staying at the home of a friend or family member. More than half felt that the quality of accommodations *far exceeded* or *exceeded expectations* (55%) in January 2012 compared with 43% last January.

- The top activities visitors enjoyed in Lee County during January 2012 were *beaches (95%)*, *relaxing (79%)*, *dining out (73%)*, and to a lesser extent, *shopping (58%)*. January 2012 visitors were more likely to *swim* (44% vs. 32%) and *bicycle ride* (26% vs. 18%) than those visiting in January 2011 – possibly the result of pleasantly warm temperatures in January 2012. Half of visitors went on a day trip outside of Lee County, with most reporting that they went to Naples (38%).

- Overall, visitor satisfaction remains extremely high, with 98% of January 2012 visitors reporting being *very satisfied* or *satisfied* with their visit, and importantly, there was a significant increase in the proportion of *very satisfied* visitors (70% vs. 57% January 2011). Nearly all visitors indicated they are likely to return to Lee County (91%), and two-thirds of them said they will return next year (65%).

- The most prevalent dislike about the Lee County area cited by January 2012 visitors was *traffic* (45%), which also ranked highest among January 2011 visitors (44%). At a much lower level, 16% voiced a concern about Red Tide, but this was a significantly higher proportion than the 4% who mentioned it last January.

- The demographic composition of January 2012 visitors was generally similar to that of January 2011 visitors. January 2012 visitors averaged 57 years of age with an average household income of approximately $103,400 – the same average age as January 2011 visitors but more affluent ($87,900 average). The majority of visitors are married (80%), but only a minority were traveling with children (14%).

Lodging Industry Assessments

- For the Lee County lodging industry in total, the number of *available* room nights and *occupied* room nights were slightly lower in January 2012 than in January 2011 (-1.1% and -2.3% respectively). Hotel/motel/resort *available* room nights were down from a year ago and *occupied* room nights were up. Condo/vacation home *available* room nights increased while *occupied* room nights decreased. RV park/campground *available* room nights decreased but *occupied* room nights decreased even more.

	Occupied Room Nights			Available Room Nights		
	2011	2012	% Change	2011	2012	% Change
Hotel/Motel/Resort/B&B	206,818	215,200	4.1%	361,770	350,139	-3.2%
Condo/Cottage/Vacation Home	105,373	98,689	-6.3%	146,754	153,264	4.4%
RV Park/Campground	137,900	125,725	-8.8%	151,373	149,295	-1.4%
Total	450,091	439,614	-2.3%	659,897	652,698	-1.1%

- The loss in occupied room nights was slightly greater than the loss in available room nights. As a result, average occupancy rates declined slightly from 68.2% in January 2011 to an average of 67.4% in January 2012 (-1.2%). For hotels/motels/resorts, the decrease in inventory paired with the increase in demand produced a positive shift in occupancy rate (+7.5%). However, average occupancy rate decreased for both RV park/campgrounds (-7.6%) and condos/vacation homes (-10.3%).
- Overall average daily rates rose from $117.28 to $119.85 year-over-year (+2.2%). Hotel/motel/resort and RV park/campground properties experienced an increase in ADR that outweighed the decrease felt by condo/vacation home properties.
- The estimated RevPAR for January 2012 was $80.72 – slightly higher than January 2011 ($79.99). While hotels/motels/resorts saw a big gain in RevPAR (+10.3%) and RV parks/campgrounds were flat, the decline for condos/vacation homes had a dampening effect on the industry average.

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
Property Managers Responding	108	103		109	100		108/109	103/100	
Hotel/Motel/Resort/B&B	57.2%	61.5%	7.5%	$127.68	$131.03	2.6%	$72.99	$80.53	10.3%
Condo/Cottage/Vacation Home	71.8%	64.4%	-10.3%	$175.34	$168.90	-3.7%	$125.90	$108.76	-13.6%
RV Park/Campground	91.1%	84.2%	-7.6%	$57.33	$62.22	8.5%	$52.22	$52.39	0.3%
AVERAGE	68.2%	67.4%	-1.2%	$117.28	$119.85	2.2%	$79.99	$80.72	0.9%

Lodging Industry Assessments

- Projections for the early months of 2012 continue to be as impressive as late 2011. Two managers in three mentioned that their total level of reservations for the next three months (February, March, and April) are up over the same period the prior year (62%) – only 17% claimed the same in January 2011. Another 25% said reservations for the next three months of 2012 are the same as last year (vs. 39% January 2011). Only about one in ten claimed that their reservations are down for the next three months (12% vs. 42% January 2011).

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January 2012 Lee County Snapshot

Total January Visitation				
	%		Visitor Estimates	
	2011	2012	2011	2012
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France	-	1%	-	2,505
Austria	-	1%	-	1,252
BeNeLux	-	1%	-	1,252
Latin America	1%	1%	1,400	1,252
Ireland	1%	-	1,400	-
Scandinavia	1%	-	1,400	-
Other	1%	2%	1,400	3,757
No Answer	1%	-	1,400	-

Total Visitor Expenditures			
	2011	2012	% Change
Total Visitor Expenditures	$288,500,058	$250,806,768	-13.1%
Paid Accommodations	$192,214,306	$173,062,969	-10.0%

Average Per Person Per Day Expenditures		
2011	2012	% Change
$109.87	$110.30	0.4%

First-Time/Repeat Visitors to Lee County		
	2011	2012
First-time	21%	22%
Repeat	78%	78%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
Property Managers Responding	108	103		109	100		108/109	103/100	
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AVERAGE	68.2%	67.4%	-1.2%	$117.28	$119.85	2.2%	$79.99	$80.72	0.9%

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Visitor Profile Analysis
January 2012

A total of 211 *interviews were conducted with visitors in Lee County during the month of January 2012. A total sample of this size is considered accurate to plus or minus 6.7 percentage points at the 95% confidence level.*

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

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

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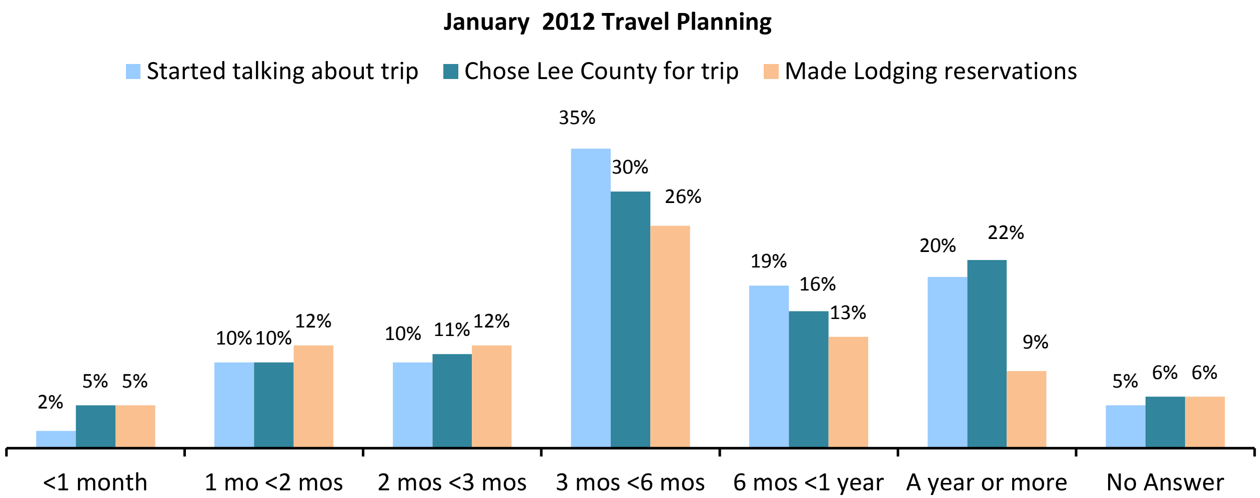
Travel Planning

	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	211	203	211	203	211
Less than 3 months (NET)	26%	21%	32%	26%	35%	29%
<1 month	6%B	2%	12%B	5%	12%B	5%
1 month - <2 months	9%	10%	11%	10%	12%	12%
2 months - <3 months	10%	10%	9%	11%	11%	12%
3 months or more (NET)	67%	73%	61%	68%	48%	49%
3 months - <6 months	25%	35%A	22%	30%	23%	26%
6 months - <1 year	20%	19%	15%	16%	16%	13%
A year or more	23%	20%	23%	22%	9%	9%
No Answer	6%	5%	7%	6%	17%B	6%

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?



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Travel Planning

Devices Used to Access Destination Planning Information	
	2012
Total Respondents	**211**
Laptop computer	64%
Desktop computer	52%
Smartphone (iPhone, Blackberry, etc.)	28%
Tablet (iPad, etc.)	15%
E-Reader (Nook, Kindle, etc.)	3%
Other portable device	1%
None of the these	6%

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 January 2012.

Travel Web Sites Visited		
	2011	**2012**
Total Respondents who use computer/devices for destination planning (2012) or who have access to a computer (2011 or prior)	178	199
	A	**B**
Visited web sites (net)	74%	87%A
Airline websites	24%	40%A
Search Engines	36%	33%
Booking websites	18%	25%
Hotel websites	16%	24%
www.FortMyers-Sanibel.com	11%	20%A
Visit Florida	8%	14%
Trip Advisor	12%	12%
AAA	13%B	6%
Facebook	-	3%
Travel Channel	2%	-
Other	15%	4%
None/Didn't visit websites	23%B	12%
No Answer	3%	1%

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

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

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Travel Planning

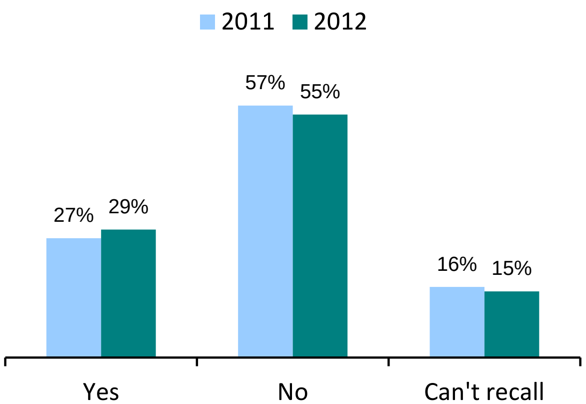
Travel Information Requests	2011	2012
	A	B
Total Respondents	203	211
Requested information (NET)	36%	33%
Hotel website	9%	15%
Call hotel	6%	10%
VCB website	3%	6%
Visitor Guide	5%	5%
Call local Chamber of Commerce	*	2%
Call VCB	*	1%
Other	16%B	8%
Did not request information	53%	61%
No Answer	11%	6%

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	211
Yes	27%	29%
No	57%	55%
Can't Recall	16%	15%

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

Recall of Promotions

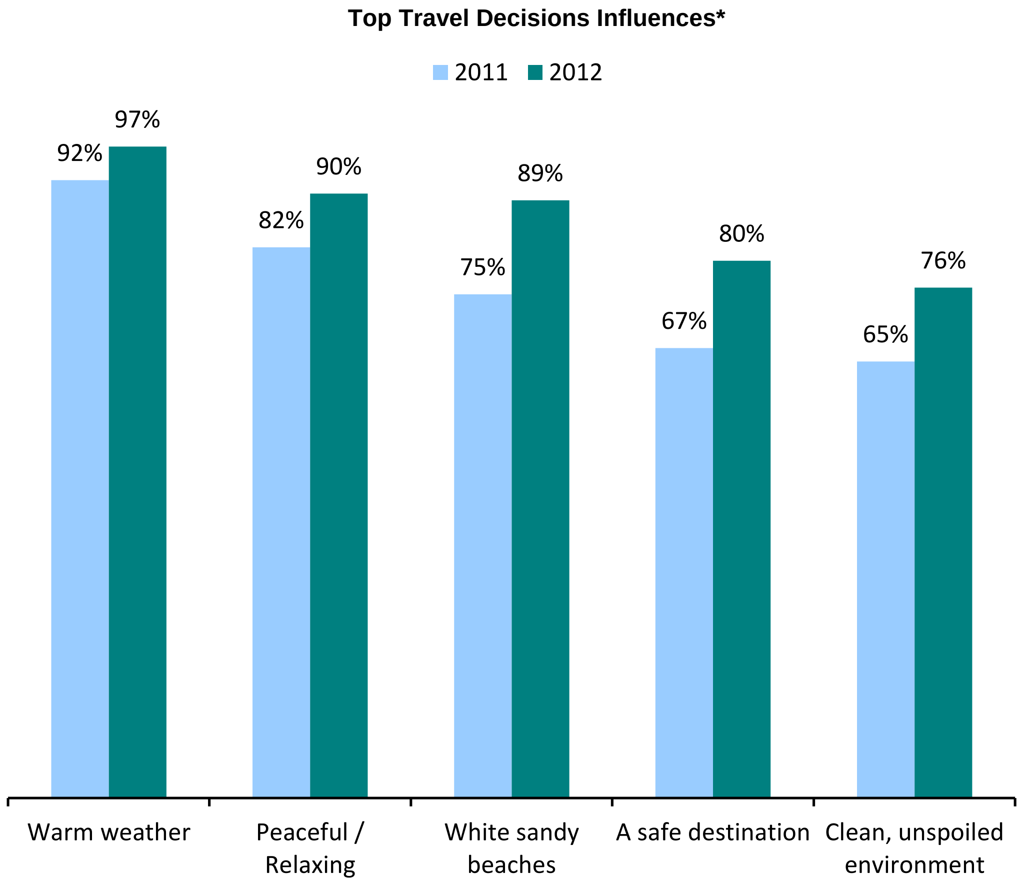


Travel Planning

January Travel Decision Influences*		
	2011	2012
	A	B
Total Respondents	203	211
Warm weather	92%	97%A
Peaceful / Relaxing	82%	90%A
White sandy beaches	75%	89%A
A safe destination	67%	80%A
Clean, unspoiled environment	65%	76%A
Convenient location	67%	73%
Good value for the money	57%	69%A
Reasonably priced lodging	55%	65%A
A "family" atmosphere	47%	63%A
Plenty to see and do	55%	63%
Upscale accommodations	35%	60%A
Affordable Dining	46%	57%A

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

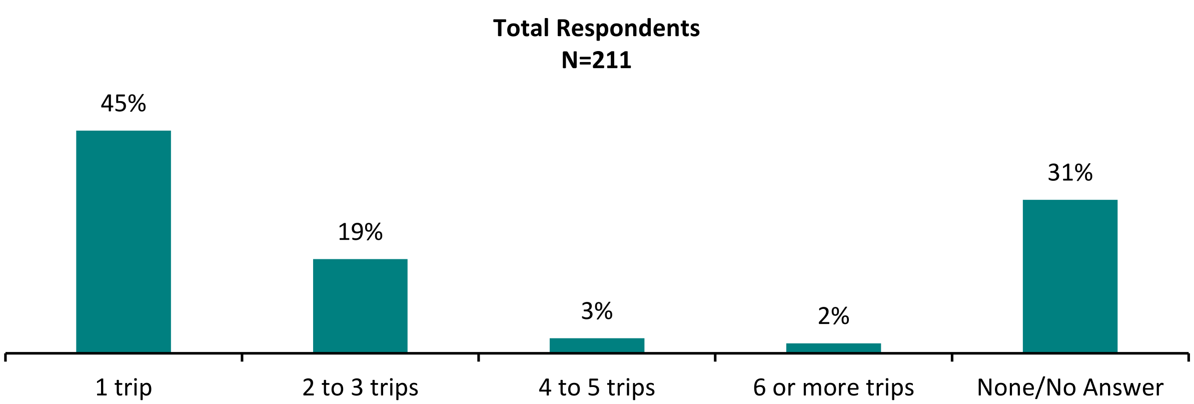
Mode of Transportation		
	2011	2012
	A	B
Total Respondents	203	211
Fly	44%	69%A
Drive a personal vehicle	41%B	27%
Drive a rental vehicle	5%	4%
Drive an RV	9%	-
Other/No Answer	*	*

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

Airport Used		
	2011	2012
	A	B
Respondents who flew into the area	89	145
SW Florida Int'l (Fort Myers)	84%	83%
Tampa Int'l	-	4%
Ft. Lauderdale Int'l	1%	4%
Orlando Int'l	3%	3%
Miami Int'l	2%	1%
West Palm Beach Int'l	2%	-
Sarasota / Bradenton	1%	-
Other/No Answer	6%	4%

Q2: At which Florida airport did you land?

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

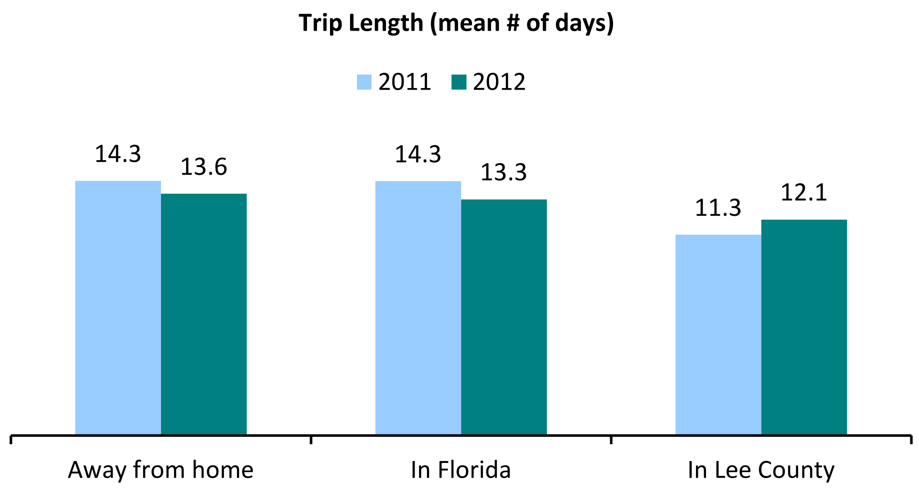


Q40. In the past year, how many trips have you taken where you used Southwest Florida International airport (Fort Myers) for your air travel?

Trip Profile

January Trip Length Mean # of Days			
	Total Respondents		
	2011	2012	% Change
Total Respondents	203	211	
	A	B	
Away from home	14.3	13.6	-4.9%
In Florida	14.3	13.3	-7.0%
In Lee County	11.3	12.1	7.1%

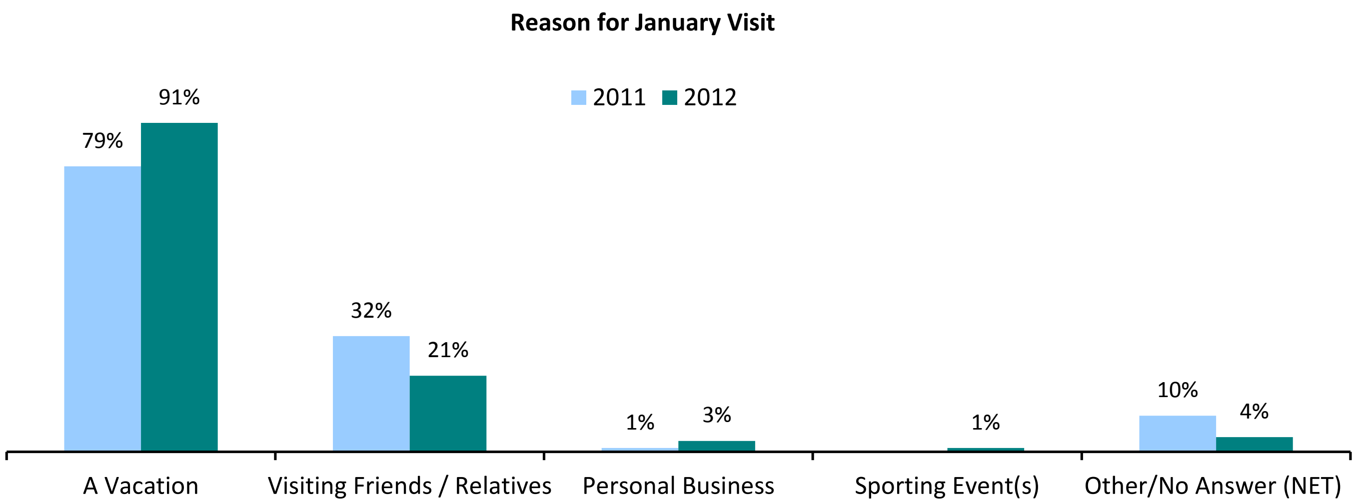
Q4a/b/c: On this trip, how many days will you be: Away from



Trip Profile

Reason for January Visit		
	2011	2012
	A	B
Total Respondents	203	211
A Vacation	79%	91%A
Visiting Friends / Relatives	32%B	21%
Personal Business	1%	3%
Sporting Event(s)	-	1%
Other/No Answer (NET)	10%B	4%

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



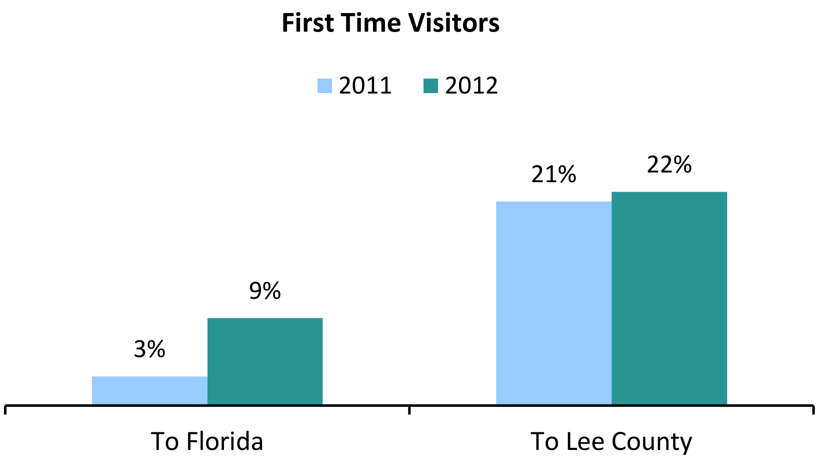
Trip Profile

First Time Visitors to Lee County								
	TOTAL		Florida Residents		Out-of-State Residents		International Visitors	
	2011	2012	2011	2012	2011	2012	2011	2012
	A	B	A	B	A	B	A	B
Total Respondents	**203**	**211**	**4****	**0**	**149**	**154**	**29****	**51***
Yes, first-time visitor	21%	22%	N/A	N/A	19%	13%	N/A	50%
No	78%	78%	N/A	N/A	80%	86%	N/A	50%
No Answer	<1%	1%	N/A	N/A	1%	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**	**211**
	A	B
Yes, first-time visitor	3%	9%A
No	95%	91%
No answer	-	-
*FL Residents**	*2%*	-

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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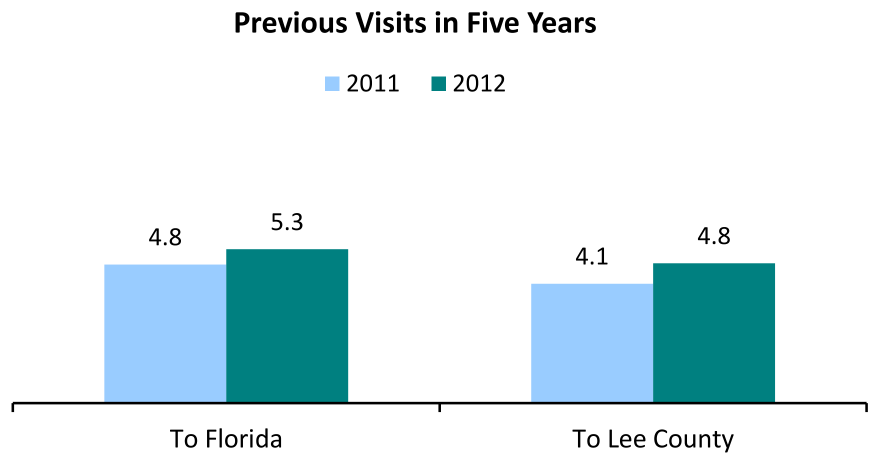
Trip Profile

Previous Visits in Five Years				
	Mean # of Visits to Florida		Mean # of Visits to Lee County	
	2011	2012	2011	2012
Base: Repeat Visitors	192 (FL res. Excl.)	192 (FL res. Excl.)	159	164
	A	B	A	B
Number of visits	4.8	5.3	4.1	4.8

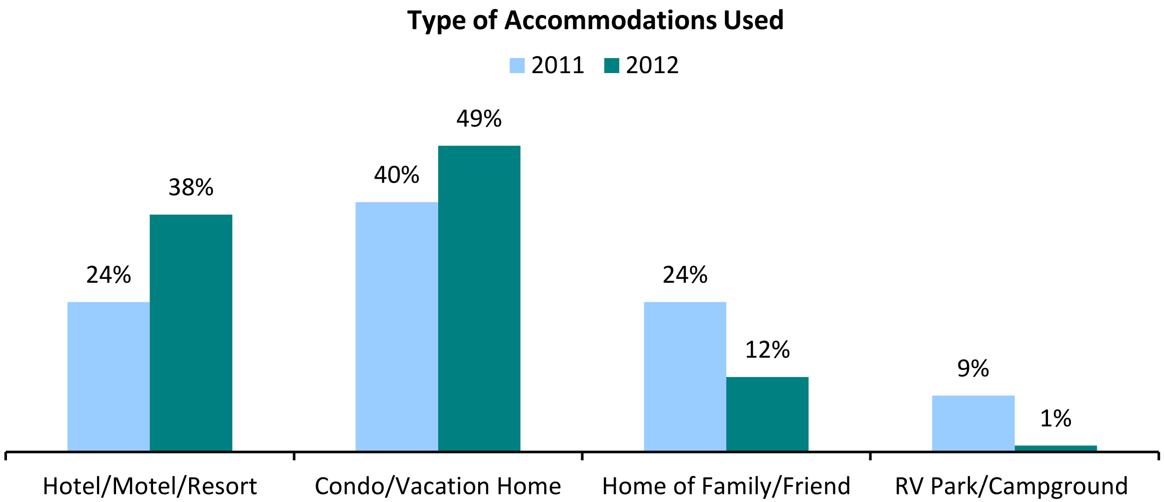
Q14: Over the past five (5) years, how many times have you visited Florida?
Q16: Over the past five (5) years, how many times have you visited Lee County?



Trip Profile

Type of Accommodations - January Visitors		
	2011	2012
	A	B
Total Respondents	**203**	**211**
Hotel/Motel/Resort/B&B (NET)	**24%**	**38%A**
Hotel/motel/historic inn	20%	23%
Resort	4%	15%A
Bed and Breakfast	-	-
Condo/Cottage/Vacation Home/Timeshare (NET)	**40%**	**49%**
Rented home/condo	30%	27%
Owned home/condo	4%	13%A
Borrowed home/condo	6%	9%
At the home of family or a friend	**24%B**	**12%**
RV Park/Campground (NET)	**9%B**	**1%**
Daytripper (No Accommodations)	**2%**	*

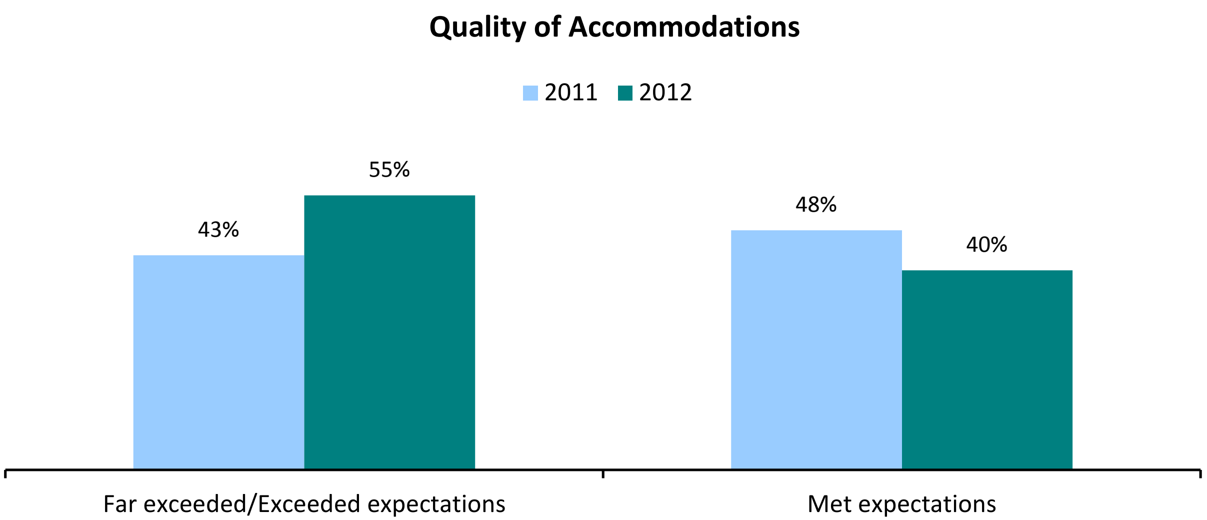
Q20: Are you staying overnight (either last night or tonight):



Trip Profile

Quality of Accommodations		
	2011	**2012**
	A	**B**
Total Respondents	**203**	**211**
Far exceeded/Exceeded expectations	43%	55%A
Met your expectations	48%	40%
Did not meet/Far below expectations	1%	1%
No Answer	7%	4%

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



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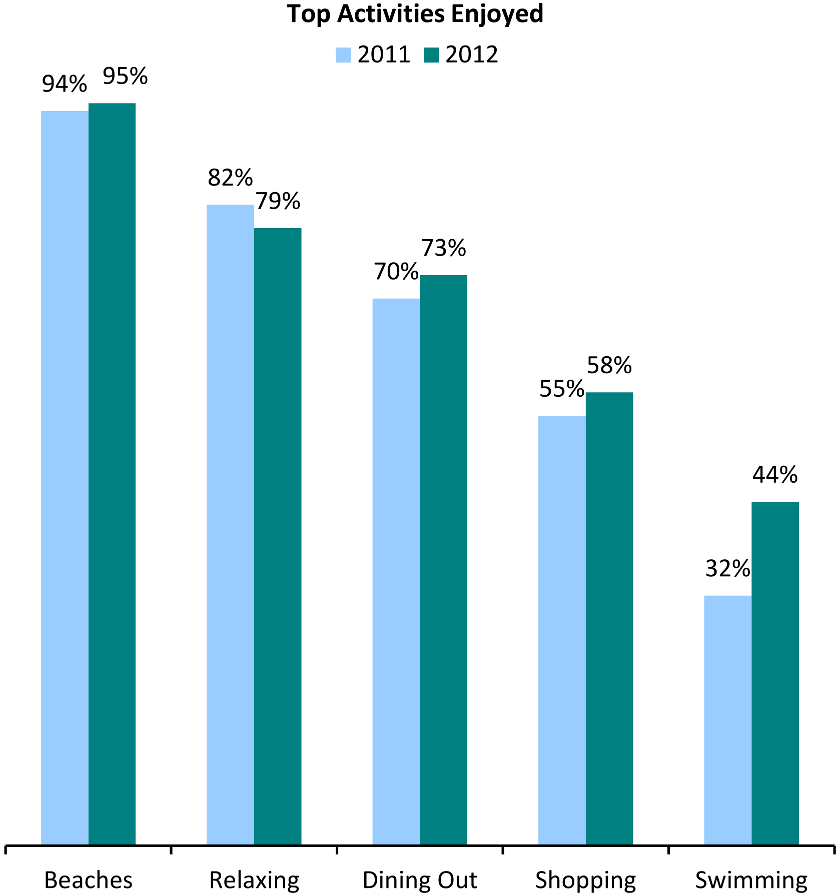
Trip Activities

January Activities Enjoyed		
	2011	2012
	A	B
Total Respondents	**203**	**211**
Beaches	94%	95%
Relaxing	82%	79%
Dining Out	70%	73%
Shopping	55%	58%
Swimming	32%	44%A
Sightseeing	39%	39%
Shelling	36%	34%
Visiting Friends/Relatives	38%B	27%
Watching Wildlife	27%	26%
Bicycle Riding	18%	26%A
Attractions	28%	25%
Birdwatching	16%	23%
Photography	21%	23%
Exercise / Working Out	15%	20%
Bars / Nightlife	22%B	14%
Golfing	16%	12%
Boating	10%	9%
Fishing	10%	9%
Cultural Events	10%	7%
Guided Tour	6%	5%
Kayaking / Canoeing	3%	4%
Miniature Golf	7%	4%
Parasailing / Jet Skiing	4%	3%
Sporting Event	6%B	2%
Tennis	4%	2%
Scuba Diving / Snorkeling	1%	1%
Other	2%	3%
No Answer	1%	1%

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



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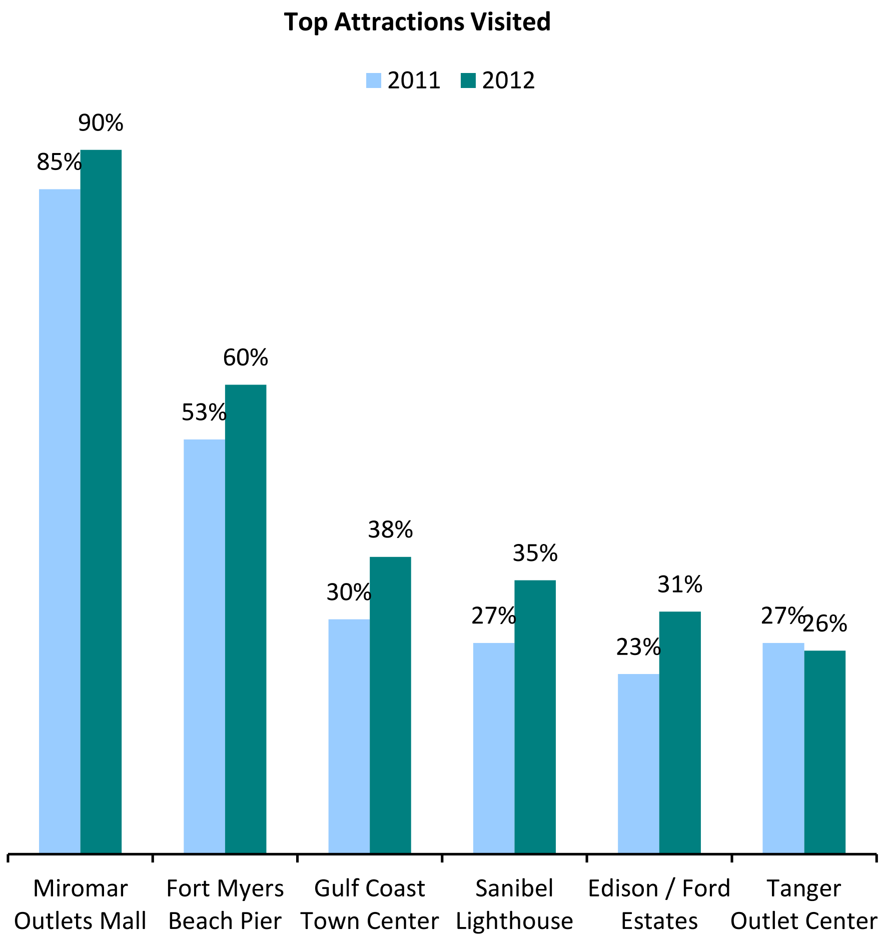
Trip Activities

January Attractions Visited		
	2011	2012
	A	B
Total Respondents	**203**	**211**
Miromar Outlets Mall	85%	90%
Fort Myers Beach Pier	53%	60%
Gulf Coast Town Center	30%	38%
Sanibel Lighthouse	27%	35%
Edison / Ford Estates	23%	31%A
Tanger Outlet Center	27%	26%
Ding Darling National Wildlife Refuge	21%	24%
Periwinkle Place	12%	23%A
Bell Tower Shops	22%	19%
Broadway Palm Dinner Theater	13%	18%
Edison Mall	13%	14%
Shell Factory and Nature Park	15%	10%
Manatee Park	13%	9%
Beaches	3%	6%
Babcock Wilderness Adventures	13%B	5%
Bailey-Matthews Shell Museum	3%	5%
Barbara B. Mann Perfoming Arts Hall	7%B	1%
Coconut Point Mall	2%	1%
None/No Answer	2%	3%

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



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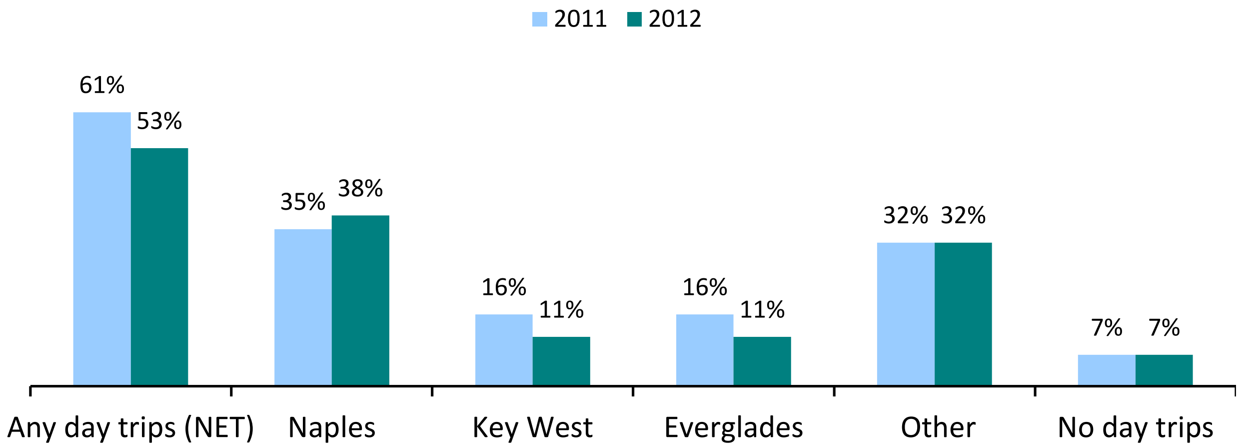
Trip Activities

January Day Trips Outside Lee County		
	2011	**2012**
	A	**B**
Total Respondents	**203**	**211**
Any day trips (NET)	61%	53%
Naples	*35%*	*38%*
Key West	*16%*	*11%*
Everglades	*16%*	*11%*
Sarasota	*10%*	*6%*
Other	21%B	14%
No day trips	32%	44%A
No Answer	7%	3%

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

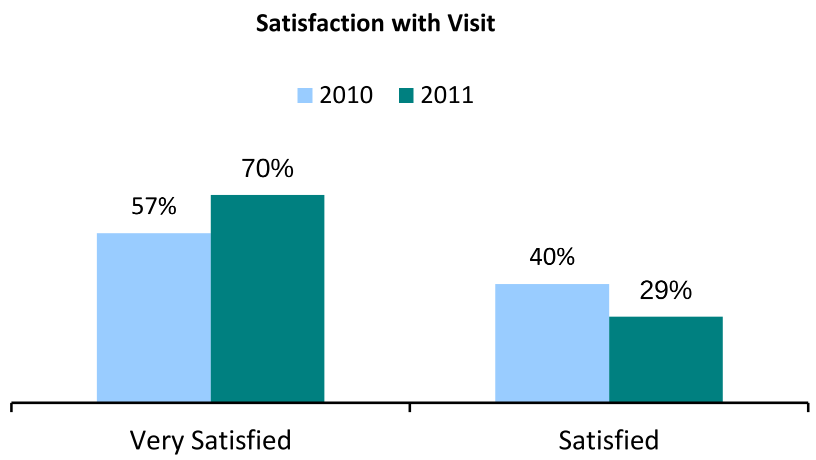
Day Trips Outside Lee County



Lee County Experience

Satisfaction with Visit		
	2011	2012
	A	B
Total Respondents	**203**	**211**
Satisfied	97%	98%
Very Satisfied	*57%*	*70%A*
Satisfied	*40%B*	*29%*
Neither	1%	*
Dissatisfied/Very Dissatisfied	-	-
Don't know/no answer	2%	1%

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



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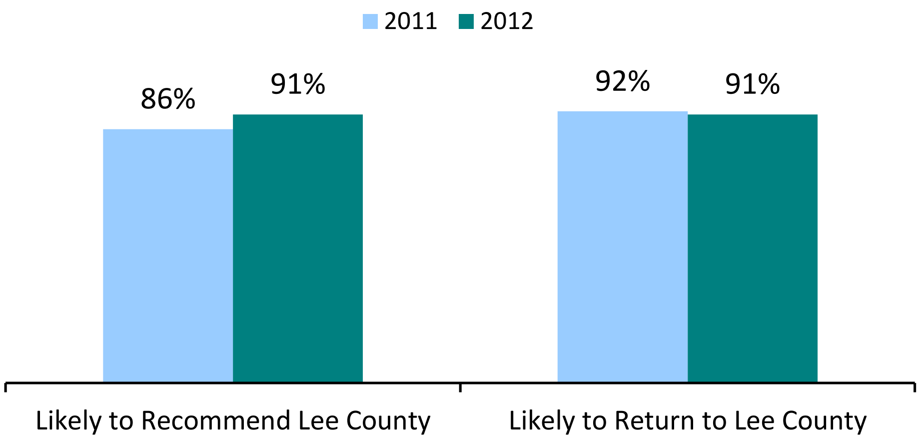
Future Plans

Likelihood to Recommend/Return to Lee County		
	2011	**2012**
Total Respondents	**203**	**211**
	A	**B**
Likely to Recommend Lee County	86%	91%
Likely to Return to Lee County	92%	91%
Base: Total Respondents Planning to Return	**203**	**211**
	A	**B**
Likely to Return Next Year	67%	65%

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

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



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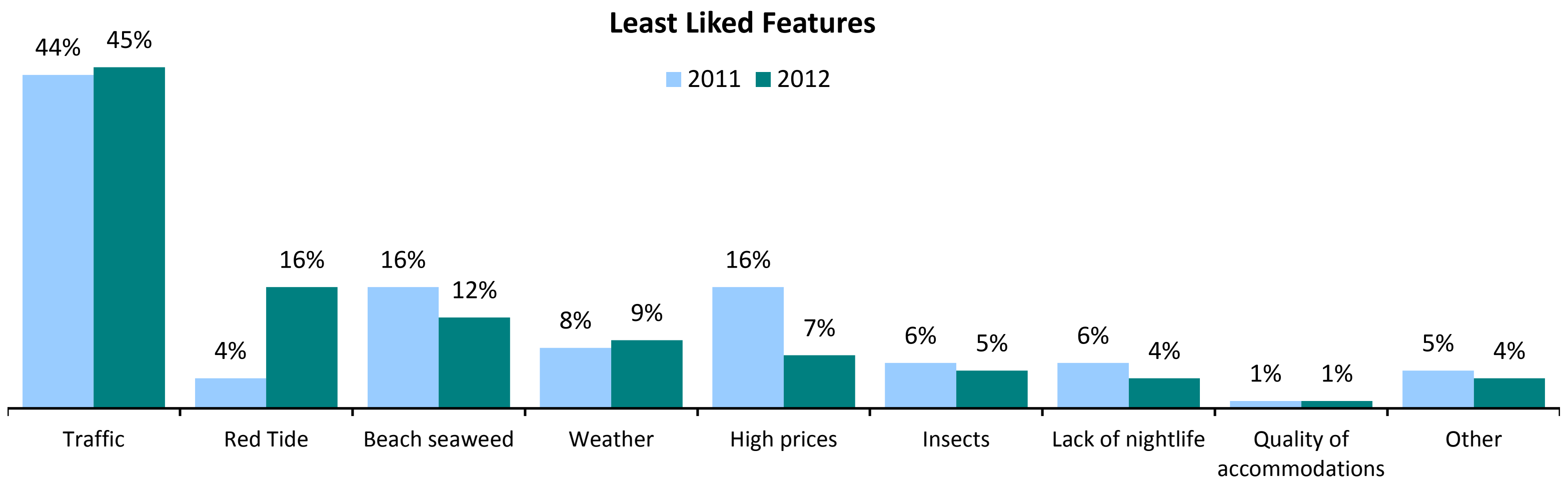
Trip Activities

Least Liked Features		
	2011	**2012**
	A	**B**
Total Respondents	**203**	**211**
Traffic	44%	45%
Red Tide	4%	16%A
Beach seaweed	16%	12%
Weather	8%	9%
High prices	16%B	7%
Insects	6%	5%
Lack of nightlife	6%	4%
Quality of accommodations	1%	*
Other	5%	4%
Nothing/No Answer	32%	31%

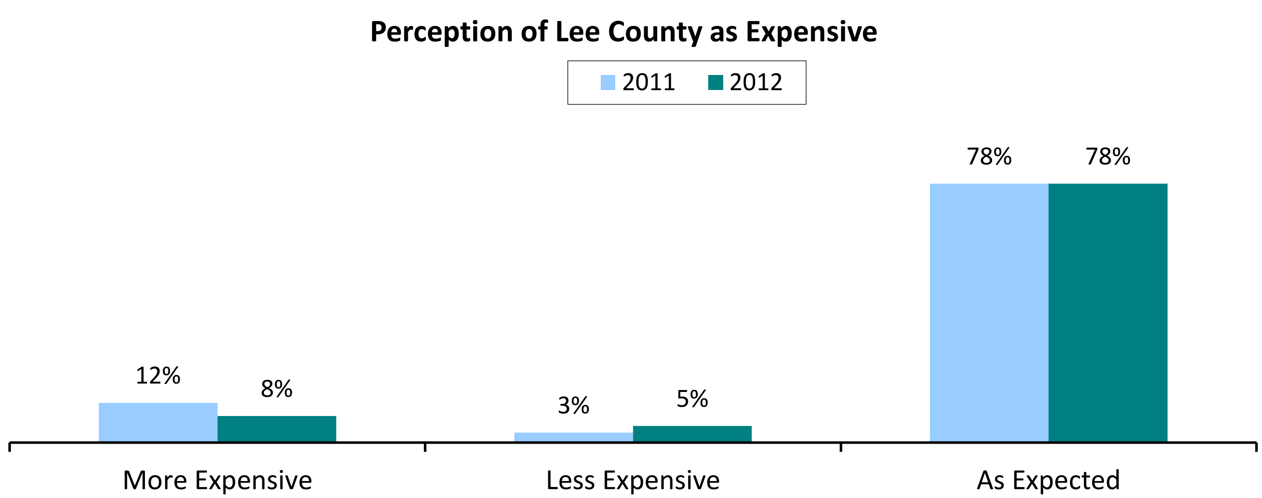
Q29: During the specific visit, which features have you liked **LEAST** about our area? (*Please mark ALL that apply.)*



Trip Activities

Perception of Lee County as Expensive		
	2011	2012
	A	B
Total Respondents	**203**	**211**
More Expensive	12%	8%
Less Expensive	3%	5%
As Expected	78%	78%
Don’t know/No Answer (NET)	6%	8%

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

Travel Party		
	2011	2012
	A	B
Total Respondents	**203**	**211**
Couple	57%	59%
Family	20%	26%
Group of couples/friends	9%	8%
Single	8%	4%
Other	4%	-
Mean travel party size	2.6	2.7
Mean adults in travel party	2.4	2.5

Q17: On this trip, are you traveling:
Q18: Including yourself, how many people are in your immediate travel party?

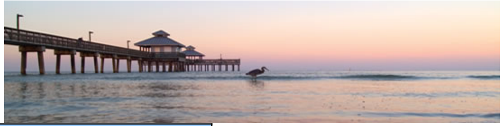
Travel Parties with Children		
	2011	2012
	A	B
Total Respondents	**203**	**211**
Traveling with any Children (net)	9%	14%
Any younger than 6	5%	8%
Any ages 6-11	5%	5%
Any 12-17 years old	2%	5%

Q19: How many of those people are:
Younger than 6 years old/ 6-11 years old/ 12-17 years old/ Adults

Visitor Demographic Profile		
	2011	2012
	A	B
Total Respondents	**203**	**211**
Vacations per year (mean)	3.0	3.0
Short getaways per year (mean)	4.5	4.3
Age of respondent (mean)	56.9	56.9
Annual household income (mean)	$87,935	$103,432A
Martial Status		
Married	75%	80%
Single	14%	8%
Other	10%	9%

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?
Q37: What is your age, please?
Q39: What is your total annual household income before taxes?
Q36. Are you: Married/Single/Other

Visitor Origin and Visitation Estimates



Total January Visitation					
	%		Visitor Estimates		% Change 2011-2012
	2011	2012	2011	2012	
Paid Accommodations	45%	45%	177,744	172,831	-2.8%
Friends/Relatives	55%	55%	216,230	207,179	-4.2%
Total Visitation			*393,974*	*380,010*	-3.5%
January Visitor Origin - Visitors Staying in Paid Accommodations					
	2011	**2012**	**2011**	**2012**	
United States	84%	75%	148,353	128,997	-13.0%
Canada	12%	9%	20,993	16,281	-22.4%
Germany	-	8%	-	13,776	-
UK	1%	2%	1,400	3,757	168.5%
France	-	1%	-	2,505	-
Austria	-	1%	-	1,252	-
BeNeLux	-	1%	-	1,252	-
Latin America	1%	1%	1,400	1,252	-10.5%
Ireland	1%	-	1,400	-	-
Scandinavia	1%	-	1,400	-	-
Other	1%	2%	1,400	3,757	168.5%
No Answer	1%	-	1,400	-	-
U.S. Region (Paid Accommodations)					
	2011	**2012**	**2011**	**2012**	
Florida	1%	-	1,400	-	-
South (including Florida)	11%	12%	16,795	15,029	-10.5%
Midwest	51%	52%	75,576	67,630	-10.5%
Northeast	25%	23%	36,389	30,058	-17.4%
West	1%	<7%>	1,400	8,767	526.4%
No Answer	<12%>	6%	18,194	7,514	-58.7%

2012 Top DMAs (Paid Accommodations)		
Minneapolis-Saint Paul	11%	13,776
Boston (Manchester, NH)	7%	8,767
Indianapolis	6%	7,514
Philadelphia	5%	6,262
Detroit	4%	5,010
New York	4%	5,010
Cincinnati	3%	3,757
Grand Rapids-Kalamazoo-Battle Creek	3%	3,757
Louisville	3%	3,757
South Bend-Elkhart	3%	3,757

On this page <>indicates a significant differences between responses for 2011 and 2012 at the 95% confidence level.

Occupancy Data Analysis

January 2012

Property managers representing 107 properties in Lee County were interviewed for the January 2012 Occupancy Survey between January 1 and January 15, 2012, a sample considered accurate to plus or minus 9.5 percentage points at the 95% confidence level.

Property managers representing 113 properties in Lee County were interviewed for the January 2011 Occupancy Survey between January 1 and January 15, 2011, a sample considered accurate to plus or minus 9.2 percentage points at the 95% confidence level.

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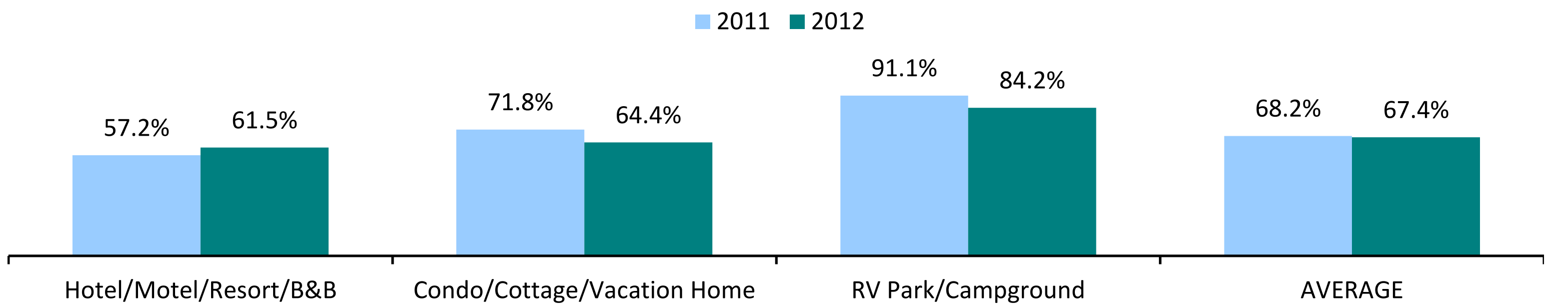
January Occupancy/Daily Rates

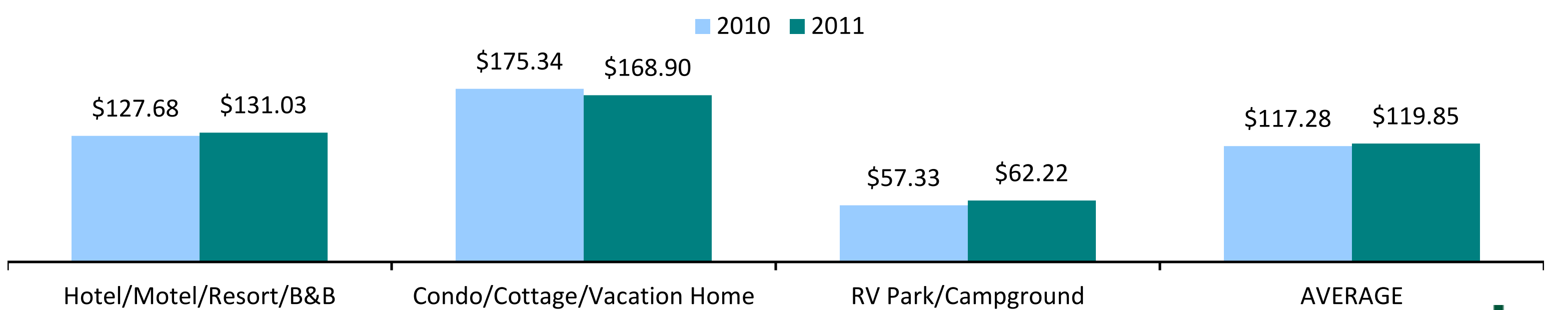
	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2011	2012	% Change	2011	2012	% Change	2011	2012	% Change
Property Managers Responding	108	103		109	100		108/109	103/100	
Hotel/Motel/Resort/B&B	57.2%	61.5%	7.5%	$127.68	$131.03	2.6%	$72.99	$80.53	10.3%
Condo/Cottage/Vacation Home	71.8%	64.4%	-10.3%	$175.34	$168.90	-3.7%	$125.90	$108.76	-13.6%
RV Park/Campground	91.1%	84.2%	-7.6%	$57.33	$62.22	8.5%	$52.22	$52.39	0.3%
AVERAGE	68.2%	67.4%	-1.2%	$117.28	$119.85	2.2%	$79.99	$80.72	0.9%

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

Average Occupancy Rate



Average Daily Rate



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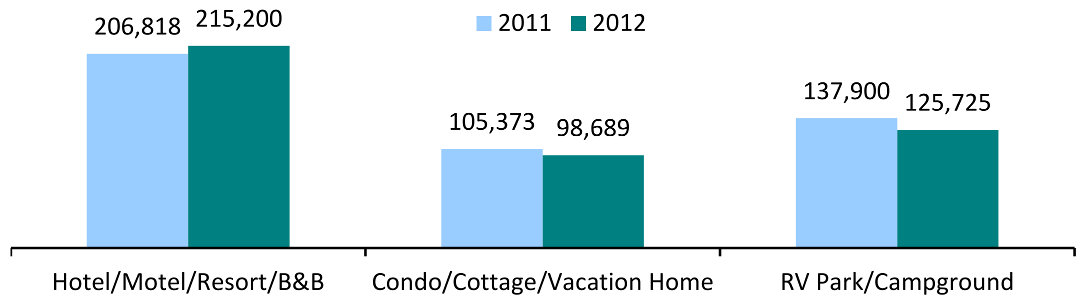
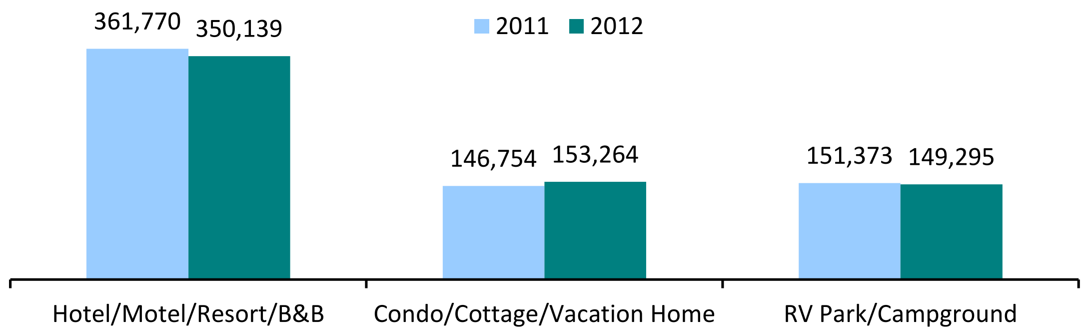
January Room/Unit/Site Nights

	Occupied Room Nights			Available Room Nights		
	2011	2012	% Change	2011	2012	% Change
Hotel/Motel/Resort/B&B	206,818	215,200	4.1%	361,770	350,139	-3.2%
Condo/Cottage/Vaction Home	105,373	98,689	-6.3%	146,754	153,264	4.4%
RV Park/Campground	137,900	125,725	-8.8%	151,373	149,295	-1.4%
Total	450,091	439,614	-2.3%	659,897	652,698	-1.1%

Occupied Room Nights



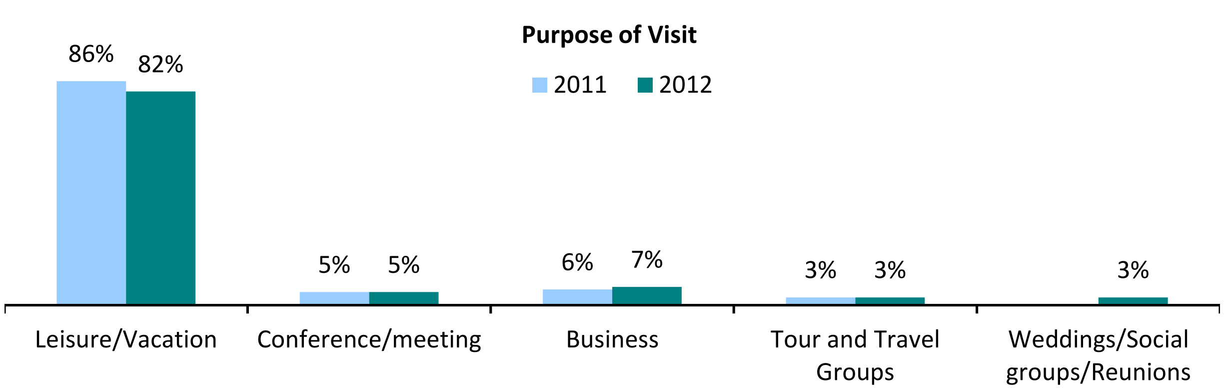
Available Room Nights



Lodging Management Estimates

January Guest Profile		
	2011	**2012**
	A	**B**
Property Managers Responding	91	91
Purpose of Visit		
Leisure/Vacation	86%	82%
Conference/meeting	5%	5%
Business	6%	7%
Tour and Travel Groups	3%	3%
Weddings/Social groups/Reunions (net)	-	3%
Property Managers Responding	101	96
Average guests per room	2.3	2.4
Property Managers Responding	100	95
Average length of stay in nights	8.6	7.7

Q23. What percent of your January room/site/unit occupancy do you estimate was generated by:
Q18: What was your average number of guests per room/site/unit in January?
Q19: What was the average length of stay (in nights) of your guests in January?



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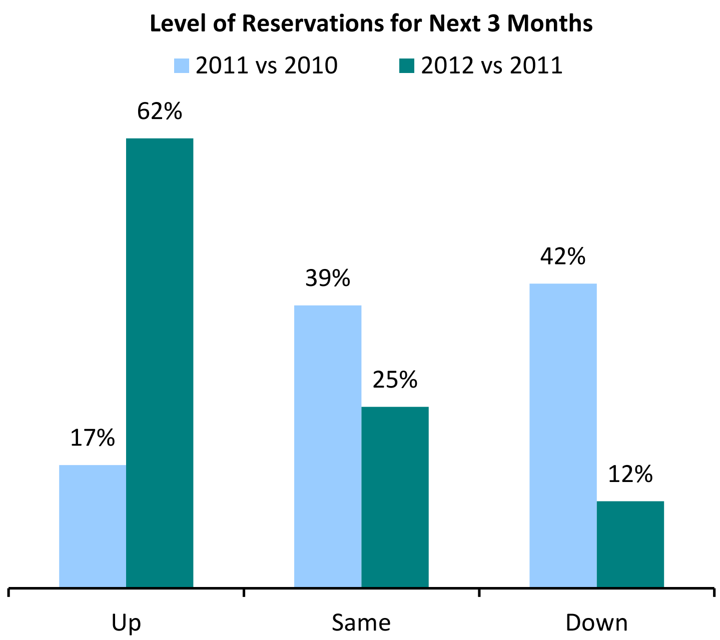
Occupancy Barometer

Level of Reservations for next 3 months Compared to Last Year		
	2011	**2012**
	A	B
Total Respondents	106	102
Up/Same	56%	87%
Up	17%	62%A
Same	39%B	25%
Down	42%B	12%
N/A	2%	1%

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



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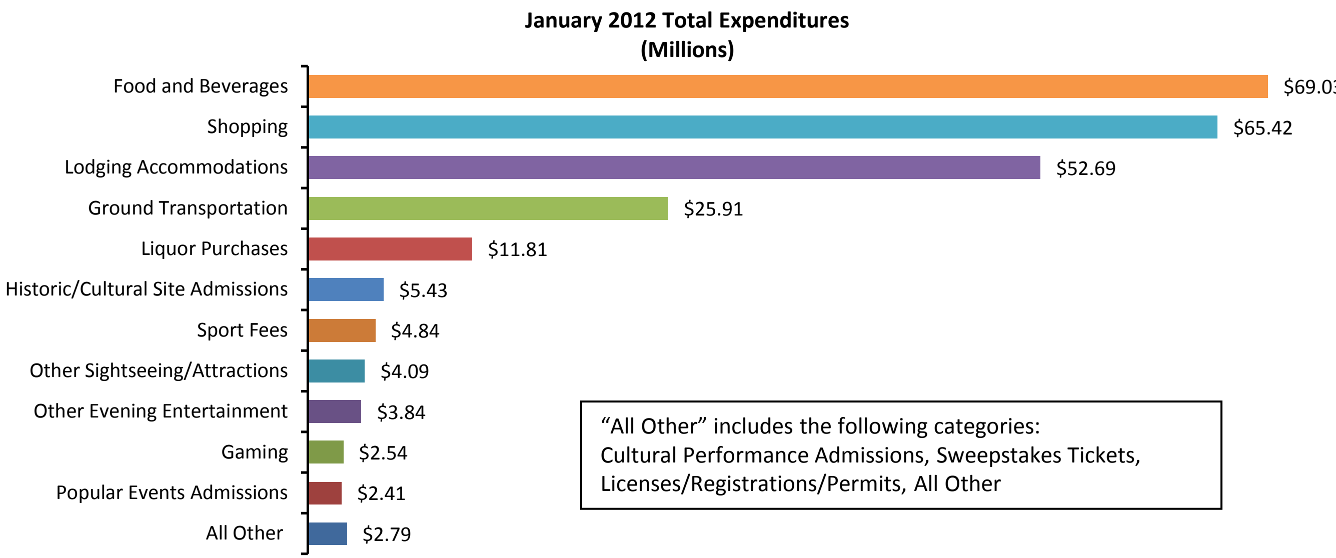
Economic Impact Analysis

January 2012

Total Visitor Expenditures by Spending Category

January TOTAL EXPENDITURES			
	2011	2012	% Change
TOTAL	$288,500,058	$250,806,768	-13.1%
Food and Beverages	$74,819,078	$69,030,585	-7.7%
Shopping	$76,713,034	$65,420,792	-14.7%
Lodging Accommodations	$52,788,333	$52,688,100	-0.2%
Ground Transportation	$27,805,816	$25,905,006	-6.8%
Liquor Purchases	$17,084,806	$11,814,995	-30.8%
Historic/Cultural Site Admissions	$5,199,849	$5,431,540	4.5%
Sport Fees	$6,631,296	$4,839,116	-27.0%
Other Sightseeing/Attractions	$7,758,085	$4,093,125	-47.2%
Other Evening Entertainment	$5,459,042	$3,840,588	-29.6%
Gaming	$5,927,021	$2,538,806	-57.2%
Popular Events Admissions	$3,686,820	$2,409,855	-34.6%
All Other	$4,626,878	$2,794,260	-39.6%



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

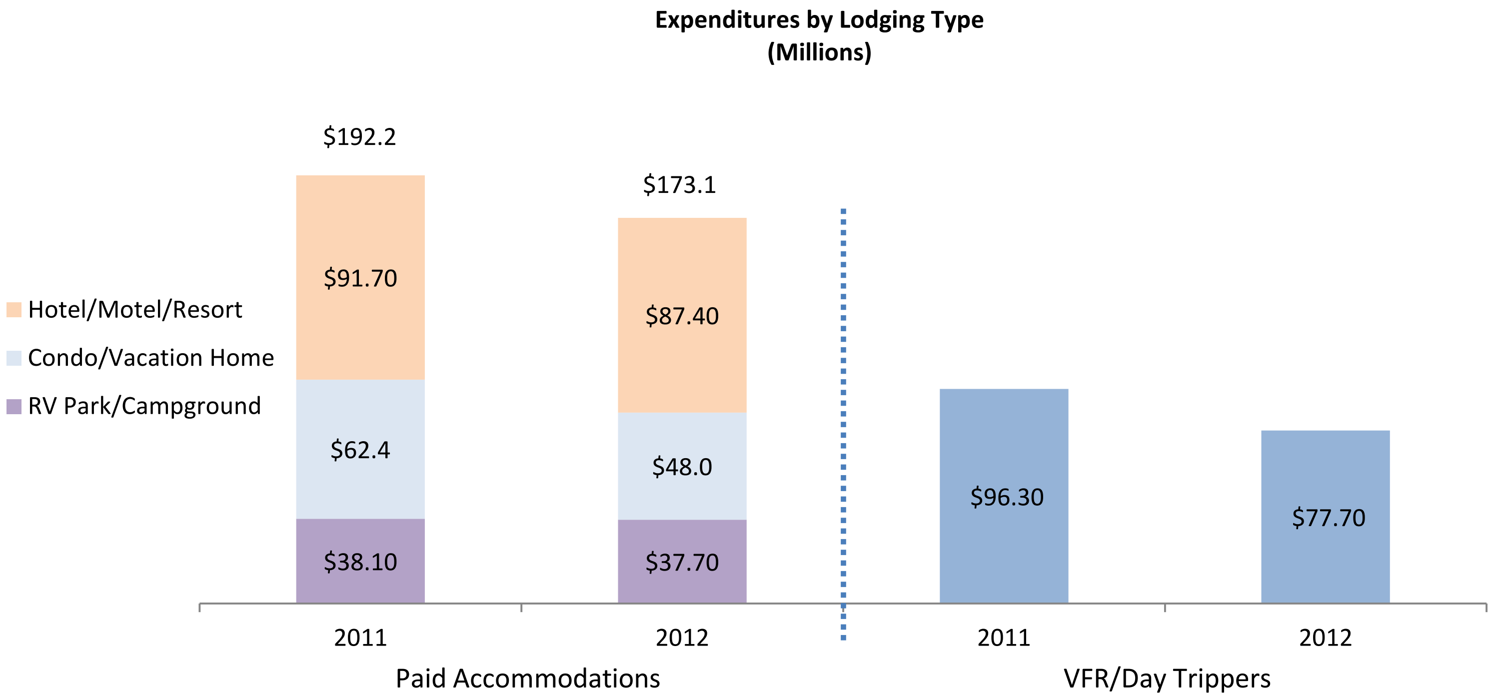
Total Visitor Expenditures by Lodging Type

ALL PROPERTIES						
	Staying in Paid Accommodations			Visiting Friends and Relatives/Day Trippers		
	2011	2012	% Change	2011	2012	% Change
TOTAL	$192,214,306	$173,062,969	-10.0%	$96,285,752	$77,743,799	-19.3%
Lodging Accommodations	$52,788,333	$52,688,100	-0.2%	$0	$0	-
Shopping	$44,920,242	$40,027,199	-10.9%	$31,792,792	$25,393,593	-20.1%
Food and Beverages	$43,728,807	$39,774,619	-9.0%	$31,090,271	$29,255,966	-5.9%
Ground Transportation	$16,948,570	$15,977,134	-5.7%	$10,857,246	$9,927,872	-8.6%
Liquor Purchases	$9,504,848	$7,956,653	-16.3%	$7,579,958	$3,858,342	-49.1%
Sport Fees	$5,163,100	$3,891,896	-24.6%	$1,468,196	$947,220	-35.5%
Historic/Cultural Site Admissions	$2,729,840	$2,915,620	6.8%	$2,470,009	$2,515,920	1.9%
Other Sightseeing/Attractions	$4,202,076	$2,751,169	-34.5%	$3,556,009	$1,341,956	-62.3%
Other Evening Entertainment	$2,259,362	$2,389,541	5.8%	$3,199,680	$1,451,047	-54.7%
All Other	$2,887,640	$2,116,383	-26.7%	$1,739,238	$677,877	-61.0%
Popular Events Admissions	$2,349,997	$1,467,640	-37.5%	$1,336,823	$942,215	-29.5%
Gaming	$4,731,491	$1,107,015	-76.6%	$719,186	$1,431,791	99.1%

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

Total Visitor Expenditures by Lodging Type

January Total Expenditures by Lodging Type					
	2011	2012	% Change	2011	2012
TOTAL	$288,500,058	$250,806,768	-13.1%	100%	100%
Visiting Friends & Relatives/Day Trippers	$96,285,752	$77,743,799	-19.3%	33%	31%
Paid Accommodations	$192,214,306	$173,062,969	-10.0%	67%	69%
Hotel/Motel/Resort/B&B	$91,691,467	$87,379,733	-4.7%	32%	35%
Condo/Cottage/Vacation Home	$62,387,825	$47,967,495	-23.1%	22%	19%
RV Park/Campground	$38,135,014	$37,715,741	-1.1%	13%	15%



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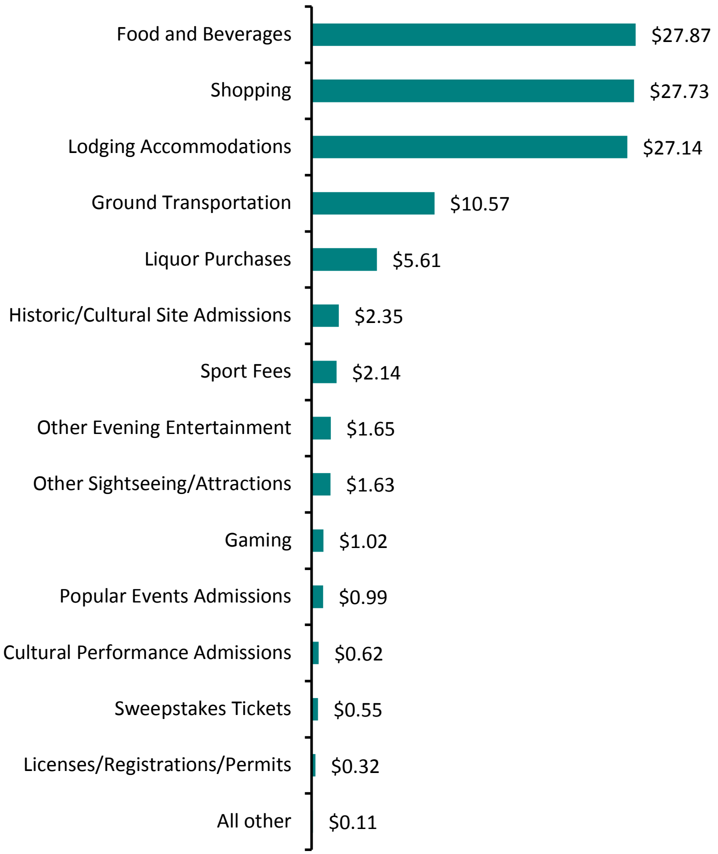
Average Expenditures

January Average Expenditures per Person per Day			
	2011	2012	% Change
TOTAL	$109.87	$110.30	0.4%
Food and Beverages	$27.98	$27.87	-0.4%
Shopping	$28.28	$27.73	-1.9%
Lodging Accommodations	$22.54	$27.14	20.4%
Ground Transportation	$10.41	$10.57	1.5%
Liquor Purchases	$6.23	$5.61	-10.0%
Historic/Cultural Site Admissions	$1.84	$2.35	27.7%
Sport Fees	$2.51	$2.14	-14.7%
Other Evening Entertainment	$2.00	$1.65	-17.5%
Other Sightseeing/Attractions	$2.77	$1.63	-41.2%
Gaming	$2.13	$1.02	-52.1%
Popular Events Admissions	$1.33	$0.99	-25.6%
Cultural Performance Admissions	$0.62	$0.62	0.0%
Sweepstakes Tickets	$0.81	$0.55	-32.1%
Licenses/Registrations/Permits	$0.37	$0.32	-13.5%
All other	$0.05	$0.11	120.0%

Average Expenditures per Person per Day
January 2012



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

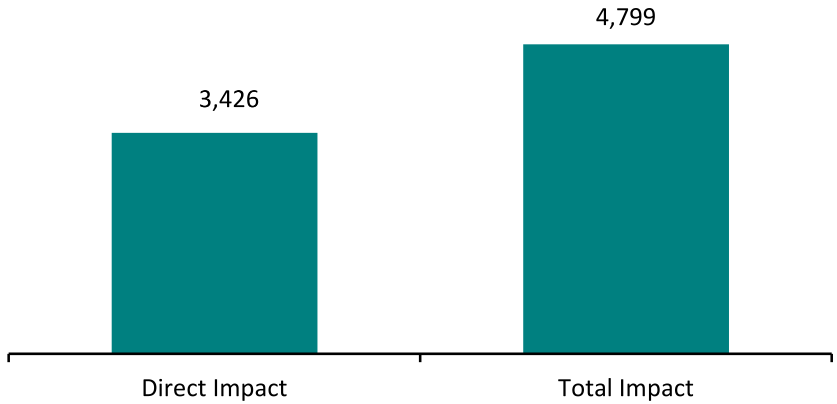
In order to produce the output (food, lodging, entertainment, etc.) purchased by visitors, businesses have to employ people.

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

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

<u>Total employment</u> includes the number of employees necessary to produce the direct output purchased with the visitor expenditures <u>PLUS</u> 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.).

Resident Employment Impact
January 2012



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Impact on Household Income for Lee County Residents

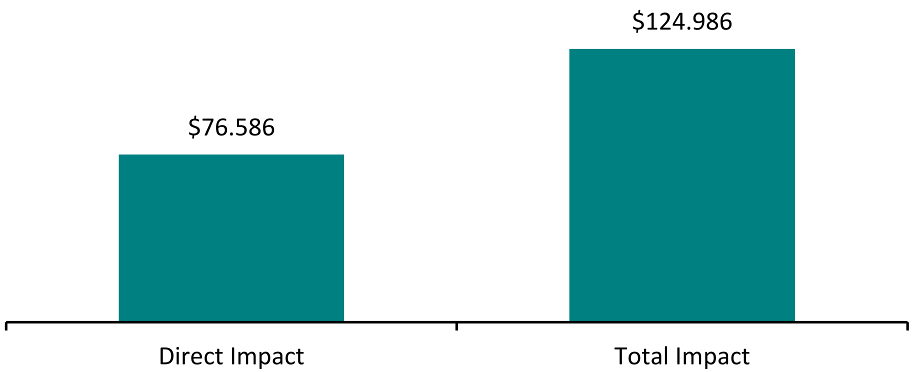
As stated earlier, in order to produce the output (food, lodging, entertainment, etc.) purchased by visitors, businesses have to employ people. This requires business owners to pay wages and salaries to their employees, and also includes proprietary income for the business owner in some cases.

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

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

<u>Total household income</u> includes the wages and salaries paid in order to produce the goods and services purchased with the visitor expenditures <u>PLUS</u> 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.).

Resident Household Income Impact (Millions $)
January 2012



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.

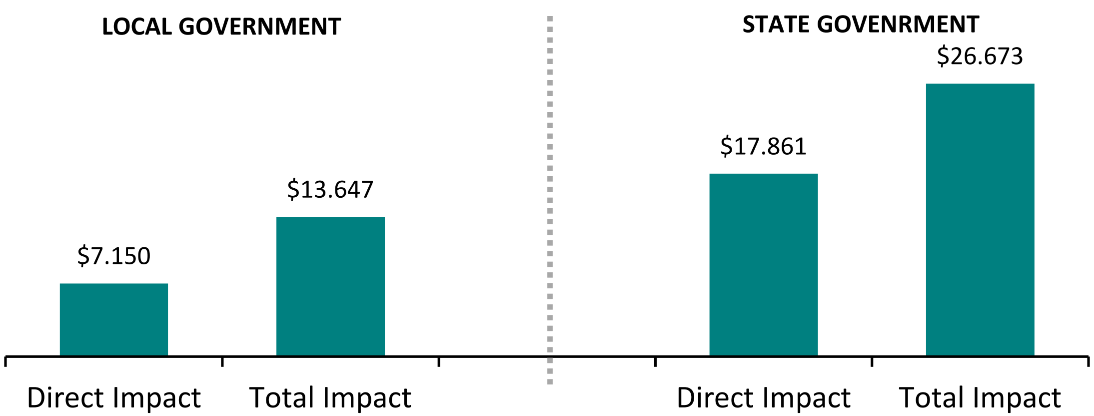
Local government revenue impact is a result of revenues provided to the local (Lee County) government. This includes the bed tax, local property tax, any local-option sales tax, and any operating income for local government agencies.

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).

State and Local Government Revenues Impact (Millions $)
January 2012



Appendix

January 2012

January 2012 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Bonita Beach	Bonita Springs	1/7/2012	25
Cape Coral	Cape Coral Yacht Beach Club	1/7/2012	10
Fort Myers Beach	The Pier	1/17/2012	12
Fort Myers Beach	Estero Beach Club	1/17/2012	5
Fort Myers Beach	Neptune Inn	1/17/2012	6
Fort Myers Beach	Diamondhead Resort	1/17/2012	10
Fort Myers Beach	Pink Shell	1/23/2012	9
Fort Myers Beach	Best Western	1/23/2012	9
Fort Myers Beach	Times Square	1/23/2012	4
Ft. Myers	Edison Estates	1/19/2012	15
Ft. Myers	Edison Estates	1/31/2012	15
North Fort Myers	Shell Factory	1/24/2012	10
Sanibel	Sanibel Surfside	1/10/2012	7
Sanibel	Loggerhead Cay	1/10/2012	6
Sanibel	Toutuga Beach Club	1/10/2012	7
Sanibel	Holiday Inn	1/10/2012	8
Sanibel	Lighthouse Beach	1/26/2012	21
Sanibel	Casa Ybel	1/26/2012	7
Ft. Myers	RSW Airport	1/28/2012	25
TOTAL			**211**

Occupancy Interviewing Statistics

Interviews were conducted from February 1 – February 15, 2012. Information was provided by 107 Lee County lodging properties.

Lodging Type	Number of Interviews
Hotel/Motel/Resort/B&Bs	69
Condo/Cottage/Vacation Home/Timeshare	28
RV Park/Campground	10
Total	107

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TDC Presentation
Friday 16, 2012

Study Objectives

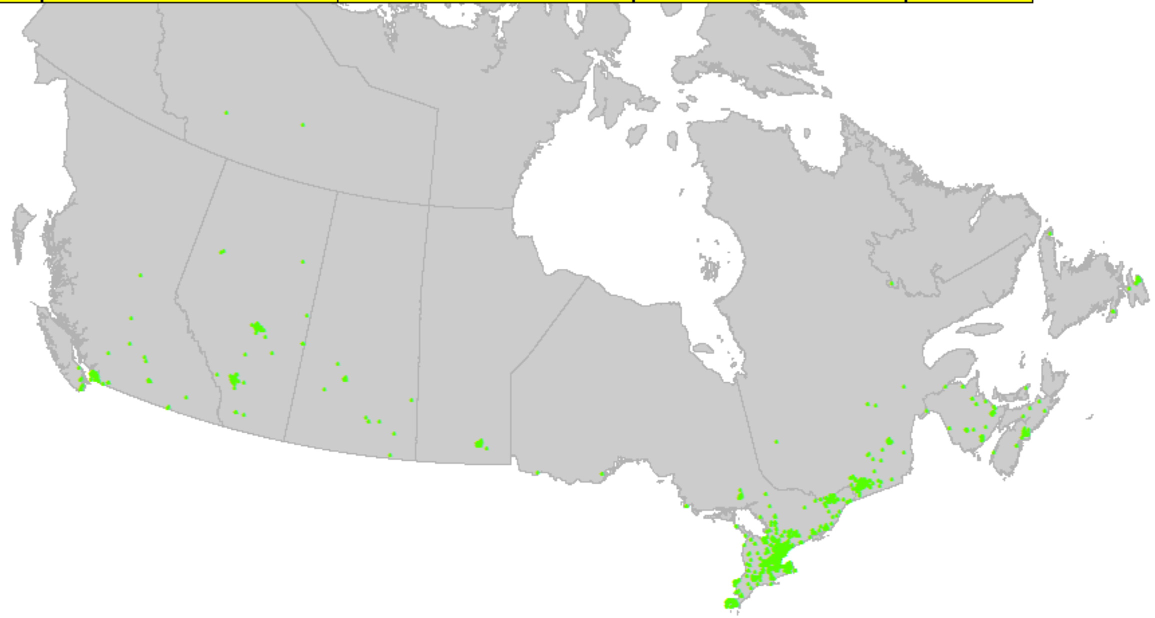
1. Describe the geographic distribution of Canadian customers to the Fort Myers-Sanibel region
2. Identify the top segment Groups and Types and identify the attributes that distinguish Fort Myers-Sanibel customers from other visitors
3. Determine the top Canadian prospects to the Fort Myers-Sanibel region

Study Approach

1. Analyze Customer Data (Complete)
2. Define Customer Study Area (Complete)
3. Analyze and Identify Top Customer Groups
4. Define the attributes that distinguish Top Customer Groups from others
5. Calculate Top Prospect Types
6. Report the size and location for Top Prospects

2. Define Customer Study Areas
Distribution of Canadian Customer Postal Codes

Region	Province	Customer Count by Province	Customer Count by Region	Customer %
Ontario	Ontario	1,302	1,302	72.0%
Quebec	Québec	144	144	8.0%
West and Prairies	British Columbia	102	259	14.3%
	Saskatchewan	18		
	Manitoba	42		
	Alberta	97		
Atlantic Canada	Nova Scotia	35	103	5.7%
	New Brunswick	46		
	Newfoundland And Labrador	21		
	Prince Edward Island	1		
Total			1,808	



*Total of 1808 is a result of 2 records for NWT being removed.

* Benchmark to the region

3. Analyze & Identify Top Customer Groups

Retail with News Segments

- Market segmentation system, built using G5 databases, including:
  - SuperCensus, NADbank, Family Expenditures
- All postal codes in one of 20 Groups and 150 Types

- Information
  - Profile of a group of consumers sharing many common characteristics (demographic, lifestyle, retail, expenditures)
  - Group level descriptions (arranged by income)
  - Types within Groups (arranged by income)

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Analyze Top CMA Prospects

Region	News Readers Segment	News Readers Segment Name	Minimum # of Prospect HHLDS	Prospect Proportion
Toronto	A	Fortunate Fortunes	162,028	8.47%
	B	Home & Owners	269,720	14.10%
	I	A Place of My Own	315,378	16.49%
Montreal	B	Home & Owners	128,222	7.86%
	F	Style Sense	443,851	27.21%
	A	Fortunate Fortunes	19,919	1.22%
Calgary	A	Fortunate Fortunes	42,463	9.24%
	C	Backyard Accents	163,933	35.68%
	B	Home & Owners	36,869	8.02%
Total			1,582,383	

4. Top Customer Segments: Ontario - Group A, B, I

Executives & Excursions

Average Household Income: **$157,391** *Households*: 1302

Living full lifestyles, these 40-49 year old married couples with school aged children live in a single detached house they own. With British, European, Eastern European, East Asian and some Middle Eastern heritages along with the presence of some slightly younger singles renting a high rise apartment, this group is culturally diverse. Well educated, they earn substantial incomes in management, sciences, arts and culture. Keeping informed professionally and socially, they click on the internet, use their PDA or Blackberry to keep connected and indulge in meal at a fine restaurant, selecting imported and micro-brew beer or Australian and South American wine to satisfy their palates. Maintaining health and image are essential and they work-out at a health or fitness club, take nutritional and herbal supplements and purchase personal care products.

Travel

- ✓ Use beach resort, sightseeing tours, - other country, casino, ski /golf packages. Used airline, train & rent a car
- ✓ Visited Ottawa, Montreal, Vancouver, NYC, Boston, Washington, other Florida, Nevada, Mexico, Caribbean, Cuba, Dominican Republic, UK, France , Europe and South/Central America in the past 3 years
- ✓ Spent $7,000 - $10,00 or more on vacations in the past 3 years
- ✓ Likely to take up to 6+ personal trips within own province, 1-2 to other province, 3-6+ to the US, and 1 or more trips to Mexico or Europe in next 6 months

4. Top Customer Segments: Ontario - Group A, B, I

Executives & Excursions

Media & Communication

- Read national & local newspapers ie. Toronto Star, Metro,24 Hours, read online newspapers
- Use internet for information on home furnishings, fashions, sports equipment, entertainment, travel arrangements
- Access non-newspaper sites for news

Leisure & Recreation

- Participate tennis, racquet sports, skiing, canoeing/kayaking, basketball
- Attend hockey, baseball, soccer and basketball games
- Visit museums, galleries, symphony, pubs & clubs pop/rock concerts, movies and live theatre

Lifestyle & Shopping

- Shop The Bay, Best Buy, Home Depot, ethnic food shops
- Spend on men's, women's & children's clothing, exercise equipment, groceries, home renovations, accessories, & entertainment
- Invest in RESPs stocks, mutual funds, GICs & have 5 or more credit cards
- May have a family member move to retirement home or made last mortgage payment

4. Top Customer Segments: Quebec - Group B, F, A

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Fine Vintage & Voyages

Average Household Income: **$111,026**   *Households: 144*

These 45-59 year old married and common-law couples with older school aged children, live in larger households in a single detached house they own. With university and certificate level educations they work in management, natural and applied sciences, education and government services. Culture and lifestyle are important to this Francophone group who enhance their style and image spending on personal and home appearance and tune their wellbeing at health and exercise clubs or by playing sports and purchasing vitamins and nutritional supplements. Engaging socially and culturally, they dine out and share a glass of American beer, European or Australian wine with friends, use their cell phones to keep in touch and wind down with a good vacation.

Travel

- ✓ Use beach resort package, sightseeing tour, golf package, cruise. Used airline, car or car rental
- ✓ Vacationed in Quebec, PEI, Ottawa, North Carolina, Massachusetts, other Florida, Nevada, Cuba, France, Dominican Republic, Mexico in the past 3 years
- ✓ Spent $3,000 - $7,000 or more on vacations in the past 3 years
- ✓ Likely to take 3 – 5 day trips to another province, and 1 or more trips to the US, Mexico/Caribbean or Europe in next 6 months

4. Top Customer Segments: Quebec - Group B, F, A

Fine Vintage & Voyages

Media & Communication

- Read national & local daily newspapers ie. Montreal Gazette, Le Devoir, Ottawa 24 Hours, read online newspapers
- Internet activities include TV networks, radio stations, banking, search for airline, travel destinations, restaurant listings, real estate, autos, purchases, use email
- Access Canoe.ca, Expedia.ca, Cyberpresse.ca

Leisure & Recreation

- Participate inline skating, hockey, snowmobiling, gardening, photography
- Attend hockey games
- Visit museums, live theatre, dance performances, pop/rock/jazz concerts

Lifestyle & Shopping

- Shop at Home Depot, Costco, butcher /produce shop
- Spend on men’s, women’s & exercise clothing, jewellery, exercise equipment, home entertainment, renovations & gardening supplies
- Invest in company pension plan, RESPs, stocks, mutual funds, have 3 or more credit cards
- Expect to see child go off to university/CEGEP & last child leave home

4. Top Customer Segments: West & Prairies – Group A, C, B

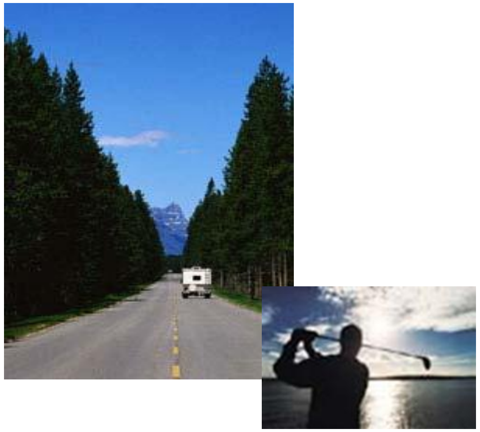
Appetites & Activities

Average Household Income: **$202,155** *Households*: 259

With an appetite for the finer things, this group of well educated 45-54 year old married couples of British, European, Eastern European and some East Asian origins live with their school aged children in a recently built single detached home they own. They earn substantial incomes, working in management, business, finance and natural and applied sciences. Keeping engaged in their worlds, they use a cell phone and click on the internet for a variety of communication, information and consumer activities. Health and wellness is important to maintain their active lifestyles and they purchase nutritional supplements and use health clubs. Home and family are central as they spend on items for the home but also indulge in dining at a fine restaurant and enjoy a glass of BC, Australian or imported wine.

Travel

- ✓ Use beach resort package, sightseeing tour - other country, ski/golf packages. Used airplane, train & rented a car
- ✓ Visited other Alberta, Victoria, Toronto, California, Hawaii, Nevada, Arizona, other Florida, Mexico, Western Europe & UK past three years
- ✓ Spent $7,000 - $10,000 or more on vacations in the past 3 years
- ✓ Likely to take 1 - 5 trips to another province, 1 -2 trips to Mexico or Europe in next 6 months



4. Top Customer Segments: West & Prairies – Group A, C, B

Appetites & Activities

Media & Communication

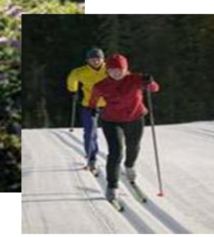
- Read national and daily newspapers ie. Calgary Herald, Edmonton Journal, Metro & 24 Hours. Read online newspapers
- Read finance & travel sections
- Internet activities include using Canoe.ca, email, research & purchases (chapters.indigo.ca, expedia.ca)
- Search entertainment, investments, auto related purchases, vacation & business travel, airlines

Leisure & Recreation

- Participate in gourmet cooking, fitness program, in-line/ice skating, skiing, golf, tennis and attend hockey & football games
- Attend live theatre, classical concerts, casinos, movies,

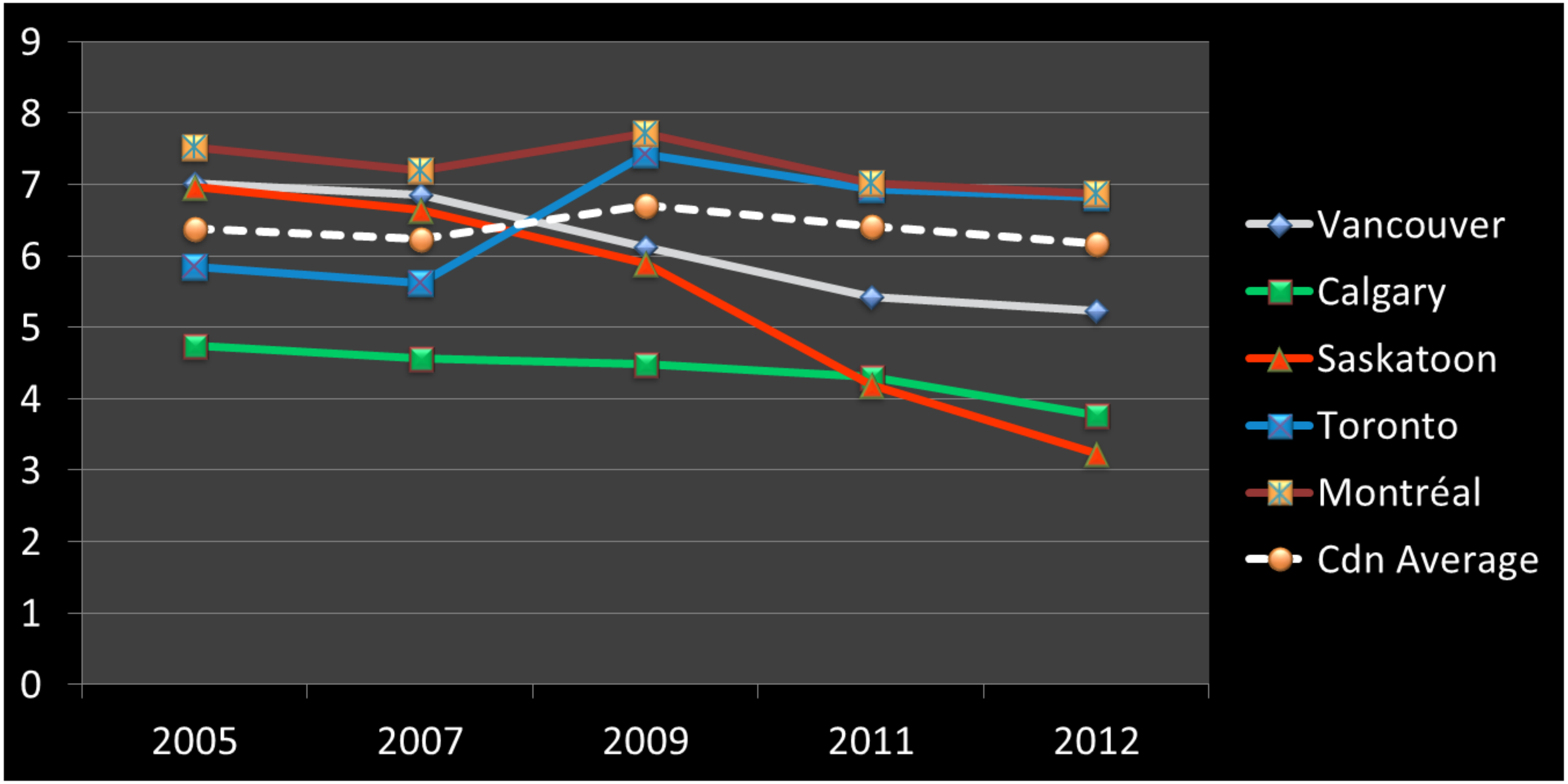
Lifestyle & Shopping

- Shop at The Bay, Best Buy, Costco, Home Depot, Warehouse outlet, health food stores
- Spend on men's & women's clothing, groceries, sportswear/exercise equipment, home accessories & appliances, gardening
- Invest in real estate other than home, RRSPs, RESPs stocks & mutual funds & own 4- 6 credit cards
- May experience adult child returning home or going to university and may retire or have child leave home in the next year



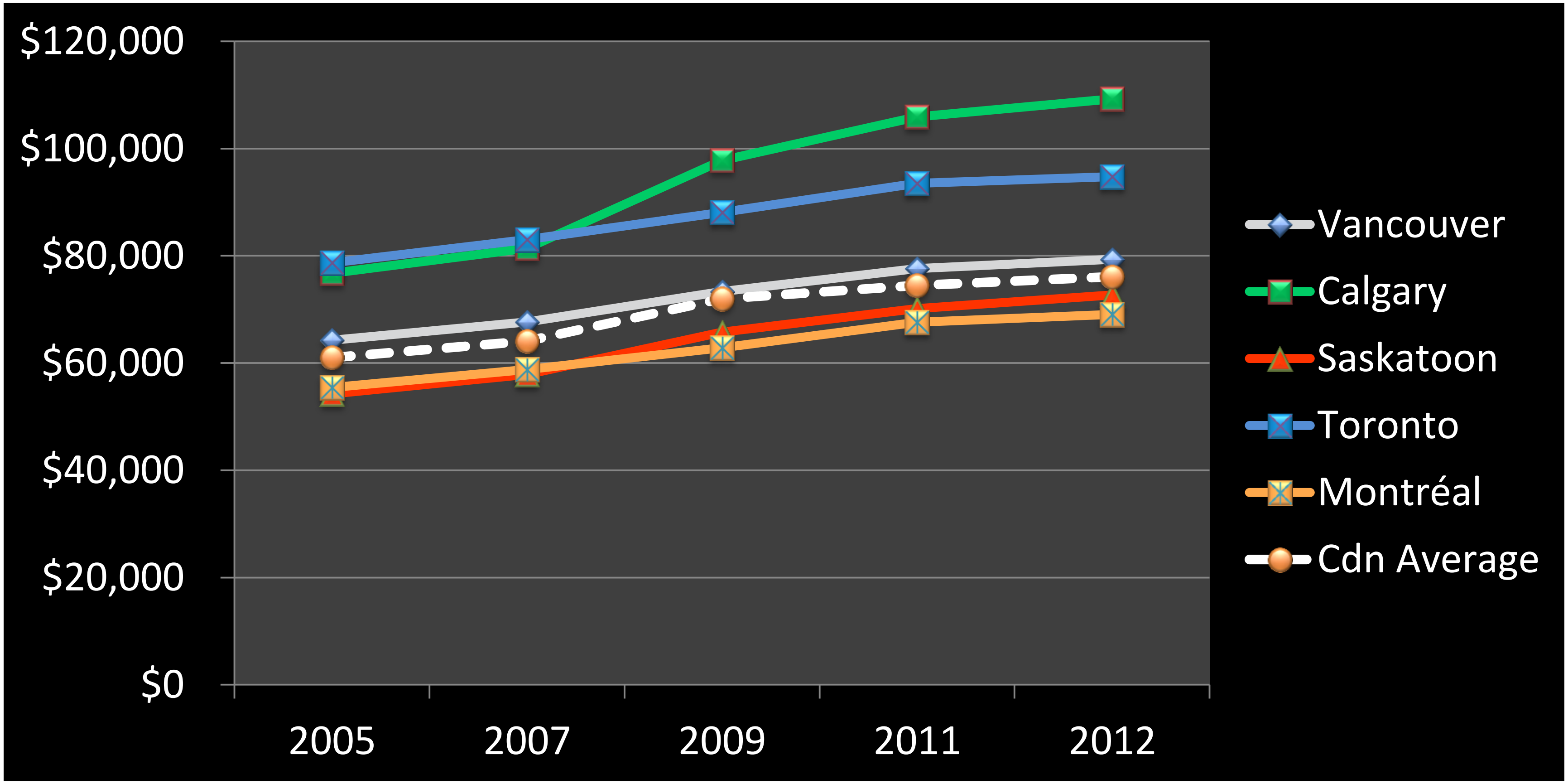
G5 SuperCensus – 2012 Results

Per cent unemployment



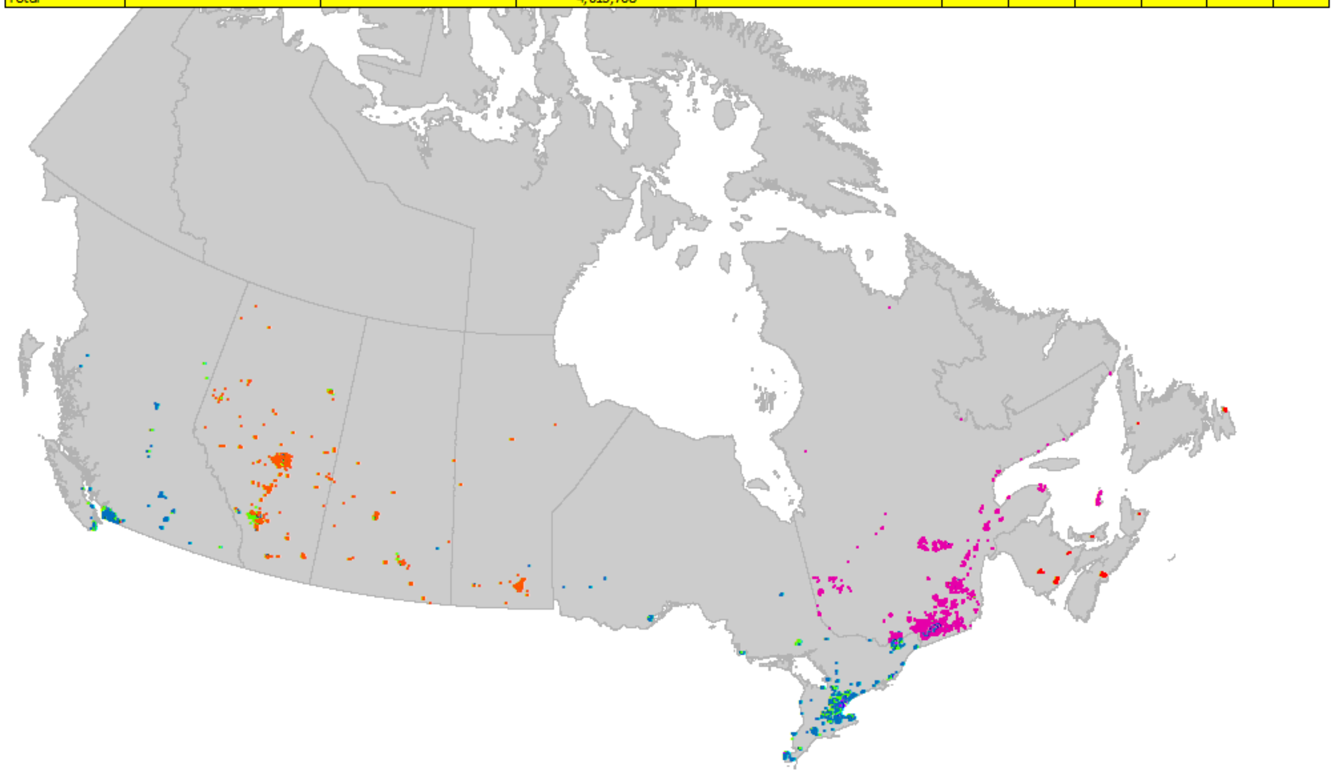
G5 SuperCensus – 2012 Results

Average household income



5 & 6. Size and Location of Top Prospects

Region	Province	Prospect Hhlds by Province	Prospect Hhlds by Region	Top Retail Nadbank Segment Groups	Group A	Group B	Group C	Group F	Group I	Group L
Ontario	Ontario	1,049,084	1,049,084	A, B, I	221,307	471,858			355,919	
Quebec	Québec	1,222,683	1,222,683	B, F, A	21,269	158,589		1,042,825		
West and Prairies	British Columbia	124,202	788,262	A, C, B	88,931	175,884	523,447			
	Saskatchewan	38,313								
	Manitoba	50,498								
	Alberta	575,249								
Atlantic Canada	Nova Scotia	380,270	953,739	L						953,739
	New Brunswick	317,119								
	Newfoundland And Labrador	201,450								
	Prince Edward Island	54,900								
Total			4,013,768							



Findings and Recommendations

1. Ontario is the largest Lee County VCB market. This region has two age bands, with 45-54 year old married couples and 35-39 year old singles. Two campaigns should be created to strategically tap these two markets.
2. With significantly higher than average incomes, the West & Prairies region is an opportunity for Lee County visitor growth.
3. The Quebec region, has a slightly older demographic (45-59) and specific language requirements which warrant a separate campaign.
4. In comparing the regions through their Social Media behaviours, Ontario is best suited for campaigns that draw Lee County customers to Social Media sites.
5. All three segments represent most affluent Canadians. These require direct marketing or at least highly personalized initiatives.
6. Slide 8 depicts the proportion of households in Toronto, Montreal and Calgary. These are well suited for mass media campaigns however for any community within those cities or for direct marketing campaigns that attract prospects to a social networking site, Generation5 recommends a ranked list of target customers.

Lee County
Tourist Development Council

Water Resource Initiative Update
March 16, 2012

SUNDSTROM,
FRIEDMAN & FUMERO, LLP
Attorneys | Counselors

TDC Water Resource Initiative

1. Water Reservation Rulemaking
2. Caloosahatchee River Watershed Protection Plan Update
3. FDEP Rulemaking & Initiatives
4. Central Everglades Planning Project
5. Lower West Coast Water Supply Plan Update
6. 2012 Legislative Roundup

SUNDSTROM, FRIEDMAN & FUMERO, LLP
Attorneys | Counselors

Water Reservation Rulemaking

- SFWMD's rulemaking for C-43 Reservoir Project water
- Need enhanced Basin storage for the estuary
- SFWMD must identify "new water" that can be reserved for estuary

SUNDSTROM, FRIEDMAN & FUMERO, LLP
Attorneys | Counselors

CRWPP 2012 Update

- Construction Projects
- Pollutant Control Program
- Research & WQ Monitoring Program

SUNDSTROM,
FRIEDMAN & FUMERO, LLP
Attorneys | Counselors

Central Everglades Planning Project

- Goal is to redirect Lake Okeechobee flows south to prevent harmful discharges to estuaries
- Bundle of current CERP Projects
- Expedited 18 month review process

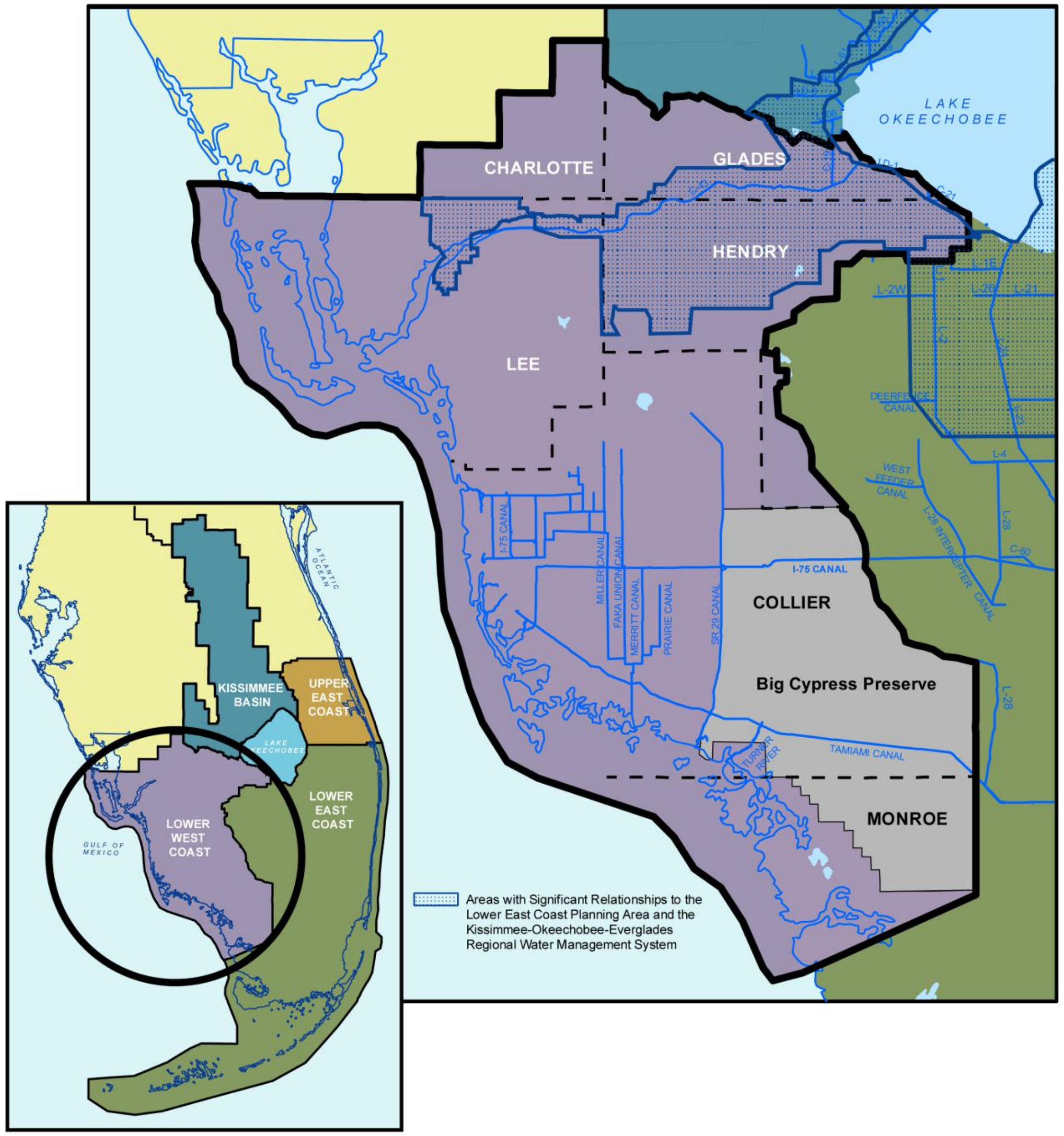
FDEP Rule Making and Initiatives

- Numeric Nutrient Criteria
- Total Maximum Daily Loads
- Basin Action Management Plans

SUNDSTROM, FRIEDMAN & FUMERO, LLP
Attorneys | Counselors

LWCWS Plan Update

- Planning document for future water resource and water supply development projects
- Impacts and benefits to estuaries



Sundstrom, Friedman & Fumero, LLP
Attorneys | Counselors

2012 Legislative Roundup

- Fertilizer Preemption
- Septic Tank Inspection
- Numeric Nutrient Criteria

SUNDSTROM,
FRIEDMAN & FUMERO, LLP
Attorneys | Counselors

Questions?

John J. Fumero, P.A.
Sundstrom, Friedman & Fumero, LLP
JFumero@sfflaw.com
O: (561) 982-7114
C: (561) 315-4595

SUNDSTROM,
FRIEDMAN & FUMERO, LLP
Attorneys | Counselors