

OUR SHARED VISION OF TOURISM

THE LEE COUNTY VISITOR & CONVENTION BUREAU
2013–2016 STRATEGIC PLAN



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Dear Partners,

In keeping with the Lee County Visitor & Convention Bureau's (VCB) long-standing commitment to planning, it is my pleasure to present you with our 2013–2016 Strategic Plan.

In shaping the Plan, and our vision of tourism, we spoke to people with broadly divergent points of view, and engaged in many passionate conversations about the future of our community. We looked inward at the strategies and tactics we've applied to date and outward at the successes of other Destination Marketing Organizations (DMOs) to identify the short- and long-term trends shaping tourism locally, nationally, and internationally.

Thus, the Plan represents the culmination of months of data collection and analysis, and is the result of collaboration with the County's travel and tourism industry, leaders in our business and civic communities, and the residents who call The Beaches of Fort Myers & Sanibel home.

We are proud of our area's reputation as a much-loved destination for millions each year. And we attribute our strong year-over-year appeal to the "why-would-you-go-anywhere-else?" sense of loyalty that's engendered after just one visit. During even the most difficult years of the economic downturn, visitation to Lee County remained steady as others struggled — a testament to the unique sense of place our destination offers.

But an aging world population, the ever-broadening landscape of global travel, and the vast impact of digital technology and information solutions create a sense of urgency about how to define the next generation of travelers and maintain the vitality of our destination in their eyes. This translates to strategies that allow us to respond to a broader sense of

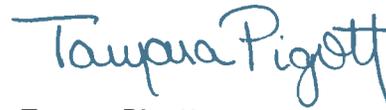
competition, grow an awareness of our brand, reach new markets, create long-lasting connections, and ensure that our appeal is as relevant and compelling tomorrow as it is today.

Research and our continuously evolving understanding of the forces affecting tourism led us to identify four core strategies that define this Plan and will guide our actions and investments over the next several years.

Our day-to-day work encompasses a multitude of initiatives and partnerships not highlighted here in order to bring clearer, more transparent focus to the issues and strategies most affecting tourism in our community. In doing so, the Plan attempts to create a roadmap for strategy while launching a public discourse about the vital importance of tourism and the opportunities and barriers ahead.

We look toward the work ahead with a great sense of optimism, balanced by a realistic awareness of the changes and challenges before us. Lee County is a unique destination, among the most beautiful in the world, and we are honored by the opportunity to showcase it each and every day. We are ever mindful that the economic growth harnessed through tourism benefits not only the tourism industry, but also, and more importantly, our community at large.

Thank you for sharing our commitment to the continued growth, prosperity and natural beauty of this destination.



Tamara Pigott

EXECUTIVE DIRECTOR
LEE COUNTY VISITOR & CONVENTION BUREAU



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LEE COUNTY VISITOR &
CONVENTION BUREAU

FACTS ABOUT OUR VISITORS

AVERAGE VISITOR IN 2012

- 52 years old with a mean income of \$105,300.
- 42% were couples.
- 36% were families.

SEASON OF VISIT IN 2012

- 21% visited during summer.
- 30% visited during winter.
- 28% visited during spring.
- 21% visited during fall.

ORIGIN OF VISITOR

- 10% of visitors traveled from within Florida.
- 45% came from the Midwest.
- 14% visited from the South.
- 22% came from the Northeast.
- 3% visited from the West.
- International visitation is led by Germany at 8%; 4% from Canada; and 4% from the UK.

AVERAGE STAY IN 2012

- 8.8 days, up from 8.5 days in 2011.
- 74% of all visitors were repeat visitors.

EXECUTIVE SUMMARY

The objectives of this Strategic Plan are to create a roadmap to guide Lee County's long-term tourism strategy and to strengthen shared community support for driving the economic and social importance of this industry. While the VCB has a strong commitment to a multitude of initiatives and partnerships that further these important goals, the Plan aims to bring clearer focus to the long-term barriers and opportunities for growth that sometimes become lost in the sea of day-to-day activities.

In this Plan, we thought broadly, but we also thought boldly. And we believe that in acting boldly, we will together achieve great success.



LEE COUNTY VCB MISSION

The VCB serves the broader interests of the economy of Lee County by acting as an industry leader to market the entire area globally, facilitate travel to the area and preserve and protect the area's unique attributes for the continual benefit of its residents and the travel and tourism industry.

LEE COUNTY VCB VISION

To enhance our position as the premier tourism marketing organization, working with our partners to promote one of the world's best tourism destinations.

DRIVING A SHARED VISION FOR TOURISM

STRATEGIC IMPERATIVES

1 Develop the Tourism Pipeline

- Expand our research efforts to define the next generation of travelers
- Lead stakeholder efforts to secure expanded air service

2 Grow Shoulder and Off-Peak Visitation

- Utilize cultural, natural and recreational assets to create events that build urgency to visit in non-peak seasons
- Enhance marketing efforts to focus off-season strategies on specific travel segments
- Focus public relations and social media strategies on leveraging niche markets like weddings, sports and ecotourism
- Utilize meetings, events and sports as “foot in the door” strategies to attract first-time leisure visitors
- Improve competitiveness of meetings and events business

3 Protect Lee County’s Natural Assets

- Raise awareness of the VCB as a leader in ecotourism
- Continue to keep natural assets at the core of Lee County’s marketing, promotional and branding strategies
- Create an issues management campaign that addresses risks to the area’s natural assets

4 Make Tourism a Shared Community Imperative

- Develop the “tourism story” for Lee County
- Educate and engage residents and local businesses about the economic benefits of tourism
- Develop community-wide objectives for intra-county transit

UNDERLYING FOCUS AREAS

Destination Assets

Brand Awareness

Community Communications

Infrastructure

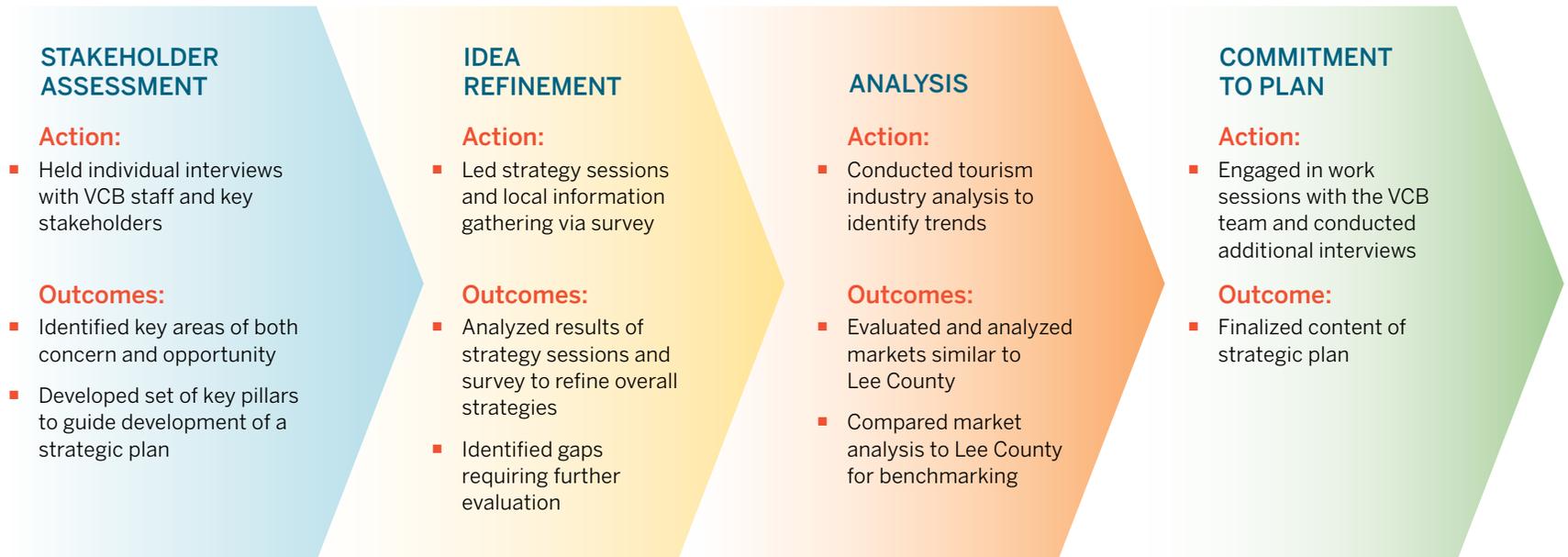
CRITICAL SUCCESS FACTORS

- Increase annual tourism spending to \$3B
- Grow RevPAR by 15%
- Grow Fall visitation by 15%

PLAN DEVELOPMENT

The Plan was devised with a focus on the collective interests of our community, and its development emphasized inclusiveness above all. Throughout the Plan development process we endeavored to be honestly self-critical about our own operations. And we were cognizant of the need to not “reinvent the wheel,” by profiting from a sound understanding of best practices throughout the tourism industry.

We collected information through one-on-one interviews, held multiple strategy sessions with opinion leaders and industry experts, undertook a community-wide survey, conducted benchmarking with destination marketing organizations in markets similar to ours across the country, and examined the short- and long-term trends shaping tourism locally, nationally, and internationally.



It is with a focus on the collective interests of our community that the Plan was devised, and the reason its development emphasized inclusiveness, above all.

SWOT ANALYSIS

CORE STRENGTHS

- Unique natural assets: pristine beaches; warm water; abundant shelling; natural wildlife
- Low-key, laid-back, uncrowded island lifestyle
- Abundant outdoor recreation; fishing, boating, kayaking, hiking, shelling, snorkeling
- Interesting cultural offerings including the Edison and Ford Winter Estates, museums, galleries, and shopping and culinary experiences
- Accommodations at all price points
- Vacation options for all stages of life
- Amateur and professional sports facilities
- Strong repeat visitation
- International arrivals in shoulder and off-peak seasons

KEY WEAKNESSES

- Inter-island, inter-county transportation
- On-island parking
- Restaurants and evening entertainment
- Entertainment district close to sports facilities
- Inconsistent quality of lodging and a lack of high-end lodging options
- Limited air access from secondary markets
- Meeting space restraints
- Aging tourism base

GREATEST OPPORTUNITIES

- Conduct and utilize research to understand and speak to the next generation of traveler
- Develop a deeper understanding of the motivators of guest satisfaction
- Expand our perspective on competition beyond our state
- Develop more opportunities to grow visitation in the shoulder and off-peak periods through festivals, amateur sports and meetings and conferences
- Educate and engage the Lee County community about the value of tourism; create awareness of the importance of key tourism initiatives
- Reinvestment in hotel and lodging product

POTENTIAL THREATS

- Adverse human impact on natural assets
- Unforeseen natural or economic events
- An inability to expand the tourism pipeline and generate replacement visitors
- Inadequate funding for tourism marketing as compared to competitor destinations
- Lack of foresight regarding the next generation of visitors and an understanding of their needs and expectations

STAKEHOLDER INPUT AND STRATEGIC ANALYSIS

The Role of the VCB

The overarching role of the VCB is to serve the broader interests of Lee County's economy by acting to:

- Market the entire area globally;
- Facilitate travel to the destination; and
- Preserve and protect the area's unique attributes for the continual benefit of our residents and guests.

The implications of these responsibilities stretch far beyond the scope of the VCB. And, though we recognize our role in leadership and advocacy, we acknowledge the strength of our partnerships and the collaboration of our community as imperatives to breaking down barriers and creating outstanding experiences.

Stakeholder Input

Input from our stakeholders and partners and an analysis of external trends across the travel and tourism industry revealed four key areas that became critical data points in developing the big, broad strategies and accompanying actions reflected in the Plan. These themes arose most frequently as strengths to build upon, or areas of weakness to work together to resolve.

1 Maximize Destination Assets.

Lee County boasts a wealth of advantages unique to our area. From our natural assets (beaches, island living, wildlife) to our arts, culture and history showpieces, and our public facilities for meetings, conferences, and sports, Lee County possesses a mix of attractions and product offerings rarely found in a single destination. Our stakeholders impressed upon us the need to maximize these advantages to continually keep our area fresh and vital in the minds of our guests, giving people more reasons to come, return, and stay even longer.

2 Build Brand Awareness.

While Lee County (promoted as the Beaches of Fort Myers & Sanibel) can claim strong brand awareness among certain Midwest and Northeast markets, in others we remain one of tourism's best-kept secrets. Though stakeholders emphasized a need to protect the pristine and uncrowded nature of our area, it was clear that we must continue to examine opportunities to build upon our existing marketing efforts. This includes expanding brand awareness in existing markets, exploring new markets and new guest segments, and gaining a better understanding of awareness, as well as drivers of visitation and satisfaction. Also to be explored is the viability of new long-haul destinations, like West Coast markets and certain international markets that are currently unavailable to us due to the limitations of direct flights and ease of travel.

STAKEHOLDER INPUT AND STRATEGIC ANALYSIS (CONTINUED):

3 Improve Community Communications.

The VCB has an important role to play in improving communications both within the tourism industry and the broader Lee County community. Stakeholders repeatedly asked us to improve our efforts to make tourism a shared imperative by helping to bridge the divide between competing interests and broadening education and awareness of the value of tourism throughout the area.

4 Focus on Infrastructure.

One barrier to tourism growth, but largely outside the scope of the VCB mandate, is infrastructure. The ability for Lee County to make improvements to solve critical infrastructure challenges is a key factor in our ability to improve our competitive position and drive strong visitation. Stakeholders called out issues such as inter-Island transportation, island parking, more direct flights from long-haul destinations, enhanced public transportation, continued and consistent hotel product/renovation, and investments in infrastructure to support meetings and events as key areas of advocacy and coalition building for the entire tourism industry.

The Lee County VCB is funded by a 5 percent tourist tax on short-term accommodations, commonly known as the “bed tax.”

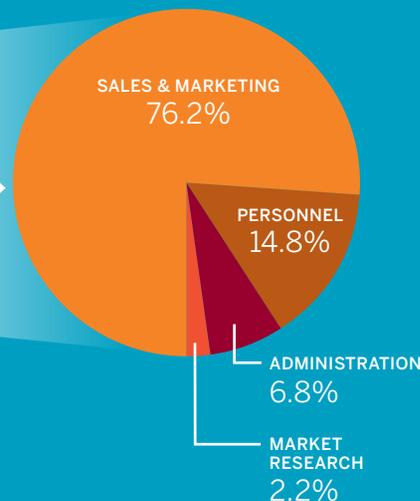
More than three-quarters of the VCB budget is dedicated to advertising and promoting the area to potential travelers. Two percent is currently devoted to market research, and just over 20 percent is dedicated to operations and personnel.

Compared to other DMOs of similar size that spend more than 50 percent on operations and personnel, the Lee County VCB is an incredibly lean and effective organization.

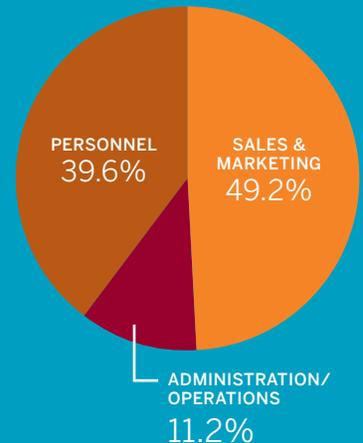
ALLOCATION OF REVENUE BY CATEGORY



ALLOCATION OF EXPENDITURES BY CATEGORY



COMPARATIVE EXPENDITURES OF DMOs WITH GROSS REVENUE EXCEEDING \$10 MILLION/YEAR



Source: Lee County Ordinance 10-31

Source: VCB budget report

Source: Destination Marketing Association International, 2011



TOURISM TRENDS Relevant to Lee County

- Lee County’s visitor population is aging five times faster than the global trend.
- Spending power from international travel markets is growing, particularly from South America to Florida.
- Stabilizing visitation in the shoulder and off-peak season has become the “holy grail” of the tourism industry.
- Access to travel booking, education, and information through mobile devices and social media will continue to grow and evolve.
- Travel is trending toward more active, healthier and greener vacations (“go-and-do” vs. “go-and-see”).

INVESTIGATION AND ANALYSIS

We analyzed these themes of underlying focus with tourism leaders and community stakeholders from across Lee County. To supplement these conversations and surveys, we explored broad industry trends and evaluated case studies from other destinations facing similar challenges. These perspectives validated the need to widen our point of view about our competitive set, which in turn provides new opportunities to glean valuable insights from other destinations. From these learnings, which are part of an ongoing process, we identified four strategic imperatives and the accompanying key actions that form this Plan:

1 Develop the Tourism Pipeline

The Plan puts research at the forefront of understanding the image and perception of our destination among a variety of current and potential segments of visitors. With deeper knowledge, we can continue to direct our efforts in ways that translate to increased economic impact, higher occupancies, a growing awareness of our brand and continued performance across all the metrics for which we are accountable.

2 Grow Shoulder and Off-Peak Visitation

Our investments in media and advertising will focus on creating awareness of Lee County as a fall travel destination to attract more visitors — especially couples — drive higher occupancy and ADR, and increase bed tax revenue. Marketing and promotions will focus on niche segments, and we’ll remain focused on important international markets, especially Germany, Canada, and the UK.

3 Protect Lee County’s Natural Assets

The VCB expects to continue its leadership role in shaping key environmental issues and acting as stewards of the environment. By educating the community about risks to our ecology and possible solutions to address those risks, we can continue to define the area’s natural resources as its key differentiator.

4 Make Tourism a Shared Community Imperative

Tourism must be viewed as a shared community imperative well beyond the specific role of the VCB. In any market, successful tourism strategies bear fruit only if the destination can deliver on the promise of the brand, which requires residents and business leaders to understand and share ownership of issues that affect the vitality of our destination, and ultimately impact our local economy and the quality of life in our communities.

Insights from Destinations with Similarities to Lee County

DESTINATION	SIMILARITY TO LEE COUNTY	INSIGHT
Aspen	<ul style="list-style-type: none"> Year-round beautiful destination with definitive high and low seasons. 	<ul style="list-style-type: none"> Utilize festivals, like the Aspen Food & Wine Festival, to drive tourism during the off-peak season.
Palm Springs	<ul style="list-style-type: none"> Need to understand the next generation of traveler. 	<ul style="list-style-type: none"> Conduct an image awareness study to determine the perceptions of visitors and non-visitors to then identify new marketing opportunities. Engage the community in a dialogue about the importance of travel and tourism to the local economy.
Philadelphia	<ul style="list-style-type: none"> Vibrant arts and culture community. 	<ul style="list-style-type: none"> Promote arts and culture offerings to drive brand awareness.



STRATEGIC IMPERATIVE #1:

DEVELOP THE TOURISM PIPELINE

WHERE WILL FUTURE GROWTH COME FROM?

The unique qualities of our destination quickly convert first-time visitors to those who loyally return year-after-year, a factor that has protected tourism trends during periods of economic downturn. What's more, we are fortunate to attract a core segment of older visitors with greater disposable income and more travel flexibility. This helps stabilize visitation across non-peak periods and drives significant economic impact to the County without generating the kind of volume that might place our natural assets at risk.

We question what aging demographics imply for the future of our destination, and we wonder:

Who will be the next generation of travelers?

For these reasons, and because the world's population is aging at a faster rate than ever before, mature travelers are a highly prized segment of the travel population and one we must continue to cultivate. But we can't ignore the fact that this population alone cannot support sustainable visitation. In recent years the population of travelers to Lee County under age 50 has steadily declined from half to less

than 40% of all visitors, while the number of travelers over age 50 has risen to greater than 60% of our current visitor population. As we look ahead, we question what aging demographics imply for the future of our destination, and we wonder: Who will be the next generation of travelers?

Emerging markets like South America, Asia, and China, all of which currently make up 1% or less of our total visitation, are growing in economic power, presenting opportunities for Lee County. Expanding visitation from international markets in which we already have a strong presence, such as Germany, Canada and the U.K., also offers important possibilities as visitors from these countries often travel during off-peak periods and spend more per day, on average, than their domestic counterparts.

New opportunities may exist to convert travelers who come for other reasons into leisure travelers. We need to continue creating incentives for meetings and conference visitors, and those who typically attend our spring training or amateur sporting events, to extend their stay and experience more that our destination has to offer. And, what about untapped markets? If travel from Los Angeles, San Francisco, or Seattle were easier, would our more accessible beaches, more affordable

hotels, warm Gulf waters and even more laid-back lifestyle appeal to our West Coast cousins?

Finally, we believe we have to broaden how we think about our competitors well beyond the borders of our state. We know we compete with Naples, Key West and Sarasota, but what about Aspen, Myrtle Beach, Costa Rica, the Caribbean, and other islands of the world? If we think in broader terms, can we appeal to a broader traveling population? Do we know who isn't coming and why?

We need to plan today to understand, capture, and satisfy the visitor of tomorrow.

This is a three-year plan, but the horizon we look toward is much farther in the distance. To achieve sustainable travel and tourism, we need to plan today to understand, capture, and satisfy the visitor of tomorrow.

Research is the core and most essential component of this Plan. Though we have a long-standing commitment to research focusing on the effectiveness of our sales and marketing programs and the resulting economic impact, it's time we move to the next level of investment in data gathering.

Our Plan calls for additional research in four key areas:

1. Satisfaction

to understand the levers we can pull to increase satisfaction with the overall experience, as well as the areas where we fall short of our brand promise.

2. Segmentation

to better define the differences in attitudes, preferences and expectations among groups of people that currently visit, allowing us to refine and target our advertising, marketing and sales efforts around specific characteristics and attributes.

3. Image and Perception

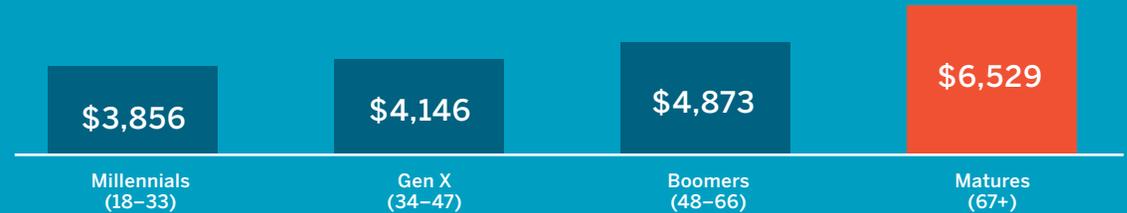
to understand why people come, or don't, based on the image and perception of Lee County as a destination.

4. Competitors

to achieve greater clarity about the travel choices certain consumer segments make, and with whom we compete in these areas.

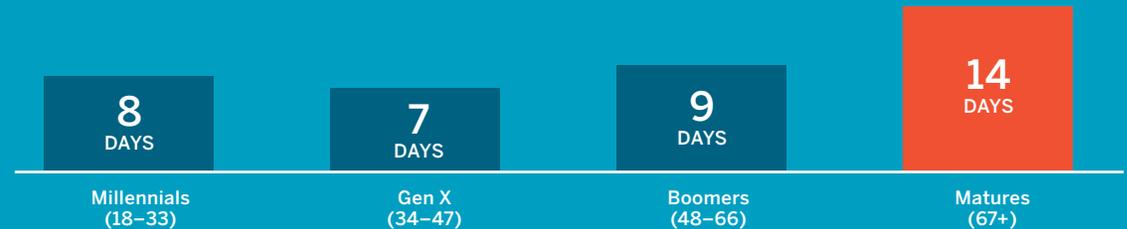
Mature Travelers are Valuable to Lee County

AVERAGE AMOUNT SPENT ON LEISURE TRAVEL DURING PAST YEAR



Source: MMGY, Portrait of the American Traveler Study

AVERAGE LONGEST CONSECUTIVE DAYS TAKEN FOR LEISURE TRIP DURING PAST YEAR



Source: Davidson-Peterson Associates

But Matures Alone are not Enough

Lee County visitors are aging more rapidly than the global population

AVERAGE AGE OF VISITOR	2008	2009	2010	2011
To Lee County	47	49	50	51
Global Travelers Overall	39.7	40.3	40.5	40.5

Source: 2012 Lee County Annual Visitor Profile, Office of Travel and Tourism Industries

STRATEGIC IMPERATIVE #1 KEY ACTIONS:

ACTION	NEAR-TERM (6 MONTHS – 1 YEAR)	LONG-TERM (1–3 YEARS)
<p>1 Expand our research capabilities to define the next generation of traveler.</p>	<ul style="list-style-type: none"> ▪ Frame the research plan, identify vendors and commence studies. ▪ Develop a profile of the next generation of travelers. ▪ Identify the most critical near- and long-term opportunities for visitor pipeline development. ▪ Publicize the results of the studies and engage residents, the business and travel community, and civic leadership in the conversation about tourism. 	<ul style="list-style-type: none"> ▪ Conduct a destination product audit. ▪ Actively communicate assessment results to industry partners and advocate for greater alignment between segment needs and destination product offerings. ▪ Assess the viability of a product enhancement program with low interest loans. ▪ Broaden the definition of our competitive set and with it, our marketing and communication strategies. ▪ Develop marketing strategies to engage emerging pipeline demographics.
<p>2 Lead stakeholder efforts to secure expanded air service.</p>	<ul style="list-style-type: none"> ▪ Build upon existing partnerships in targeting long-haul markets. 	<ul style="list-style-type: none"> ▪ Lead a regionalized effort to pursue targeted long-haul markets and increase attractiveness to airlines. ▪ Engage community leaders in an effort to grow business travel.

STRATEGIC IMPERATIVE #2:

GROW SHOULDER AND OFF-PEAK VISITATION

HOW CAN WE LEVERAGE STRENGTHS TO FILL CAPACITY IN THE SOFT PERIODS?

The Lee County VCB Strategic Plan focuses on growth in the shoulder and off-peak seasons as a key area of Plan emphasis. In 2012, 60% of all direct and indirect visitor spending occurred in the peak winter and spring seasons. Though it would be possible to double the number of visitors to the destination in the late summer and fall months without risk of overcrowding, moving the needle even a little on off-peak visitation would yield significant economic return to our community. Likewise, extending length of stay to winter or spring levels, especially from international segments, would create tremendous value.

Our strategies to grow off-peak visitation focus on attracting couples and in-state groups.

Mature couples make up to 80–85% of the visiting population during the off-peak months, while younger visitors and families prefer to plan their vacations around the Christmas, spring break and summer periods. Therefore, our strategies to grow off-peak visitation focus on attracting couples and in-state groups, especially in the Fall season, which produces a high repeat visitation, with high satisfaction ratings

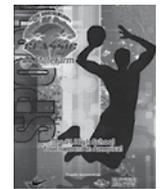
and a strong intent to return. International travelers are also critical to stabilizing visitation. Core international markets are experiencing significant growth, especially Germany.

Special offerings, such as festivals and cultural experiences that occur during limited periods, like Restaurant Week, the Calusa Blueway Festival, and Sandsculpting create a sense of urgency to visit. In addition to media and advertising, festivals and cultural events are critical to building off-peak and shoulder visitation.

Our strategy emphasizes niche marketing via digital and social media campaigns and public relations, targeting couples and families and leveraging the diverse assets and activities of the region such as: weddings, ecotourism, fishing and boating, culinary and cultural experiences, and outdoor recreation like kayaking, canoeing, paddle boarding and both professional and amateur sports.

Events and special offerings create a sense of urgency to visit and allow us to build on existing assets.

LEE COUNTY'S FESTIVALS AND SPECIAL EVENTS



Presented by Cruise & Kayak magazine



STRATEGIC IMPERATIVE #2 KEY ACTIONS:

ACTION	NEAR-TERM (6 MONTHS – 1 YEAR)	LONG-TERM (1– 3 YEARS)
<p>1 Utilize cultural, natural, and recreational assets and events to create events that build urgency to visit in non-peak seasons.</p>	<ul style="list-style-type: none"> Further develop the successful Beaches of Fort Myers & Sanibel Restaurant Week as a Fall offering. Develop visitation strategies for in-state and key feeder markets focused on couples travel. 	<ul style="list-style-type: none"> Invest additional funds to encourage the development of local cultural product and foster growth of local cultural festivals during shoulder season. Develop promotions around cornerstone annual events held during off-peak season; continue and strengthen coordination between event organizers and tourism community.
<p>2 Enhance marketing efforts to focus off-season strategies on specific travel segments.</p>	<ul style="list-style-type: none"> Develop targeted plans based on segmentation research to reach visitor populations whose interests align with off-season opportunities. Evaluate emerging international markets as targets, incorporating perception and awareness research to develop strategies. 	<ul style="list-style-type: none"> Develop strategies to increase destination awareness and grow international visitation, in key markets, especially those with off-peak visitation patterns like Germany and the U.K. Focus group leisure sales efforts toward attracting more international visitors in soft periods. Allocate additional funds for an aggressive trade marketing and advertising efforts to this audience.
<p>3 Focus public relations and social media strategies on leveraging niche markets like weddings, sports and ecotourism.</p>	<ul style="list-style-type: none"> Develop communication strategy focused on Internet usage and an on-the-go audience with significant reach to out-of-home advertising and extensive digital exposure. 	<ul style="list-style-type: none"> Develop all industry inclusive seasonal digital and social media marketing initiative based on aggressive value message for off-season travel. Extend length of stay for potential and existing sports visitors.

STRATEGIC IMPERATIVE #2 KEY ACTIONS (CONTINUED):

ACTION	NEAR-TERM (6 MONTHS – 1 YEAR)	LONG-TERM (1–3 YEARS)
<p>4 Utilize meetings, events and sports as “foot in the door” strategies to attract first-time leisure visitors.</p>	<ul style="list-style-type: none"> Encourage on-site promotions/booths at sporting events for retailers and attractions. 	<ul style="list-style-type: none"> Create a partnership among the Sports Authority, hoteliers, retailers and attractions to enhance communications about which meetings and sporting events are taking place in Lee County and create better and more targeted marketing efforts to these travelers before and during their trip. The Sports Authority will work to identify key sports tourism events that will feature large numbers of visitors (NARCh, Perfect Game) and implement portable visitor information kiosks.
<p>5 Improve competitiveness of meetings and events business.</p>	<ul style="list-style-type: none"> Advocate for improvements and necessary upgrades to Harborside Event Center and other meeting venues to remain competitive in the lucrative meetings space. Continue the Islands Incentive program to help hotel partners close business. 	<ul style="list-style-type: none"> Educate business and industry stakeholders as well as local residents about the important economic benefits created when conferences are held in Lee County. Work toward a common goal of partnering to sell Lee County as a conference destination. Advocate for a River District strategy that will assist in expanding our meetings and conference offerings.

STRATEGIC IMPERATIVE #3:

PROTECT LEE COUNTY'S NATURAL ASSETS

WHAT IS THE VALUE OF OUR NATURAL ASSETS?

Lee County faces the ubiquitous paradox of depending on tourism while needing to limit the human impact on our natural environments. Our brand values define The Beaches of Fort Myers & Sanibel as “natural, personal, freeing, inspiring, transforming and connecting,” showcasing the qualities that make ours a truly unique place. People come to Lee County explicitly to engage in and admire this unique, natural beauty and atmosphere. In fact, 94% of travelers to Lee County say our beaches are indisputably our most attractive assets, and the centerpiece of our destination.

Yet human encroachment on our beaches and these natural resources, along with swimming, shelling, wildlife and bird watching, bicycle riding, fishing, boating, kayaking and diving, cannot be taken for granted. With nearly all tourists making our beaches their highest priority, it should therefore come as no surprise that Lee County has a long-term plan for

Our pristine beaches, clear waters, lush vegetation and diverse wildlife define our brand.

beach renourishment and erosion control. This plan and a multitude of other conservation efforts geared toward beach maintenance, beach nourishment and park development, require an investment by the VCB of roughly \$6.5 million annually.

Our pristine beaches, clear waters, lush vegetation and diverse wildlife of Lee County define our brand, and yet, are also our most fragile and endangered resources.

But because tourism is one of Lee County’s most valuable industries — and has the greatest potential for long-term economic growth — isolation is not an option. We must remain vigilant in our protection of the very assets that define our destination and provide a lasting guest experience.

While the job of attracting more visitors and simultaneously limiting the impact on our beaches, waters and forests may seem contradictory actions, both work hand-in-hand to showcase Lee County’s unique attributes and drive its economy. This challenge is not new, yet it requires achieving the right mix of visitors at the right time — both in numbers and type. Achieving balance between the two requires collaborative strategies and constant communication to and among all stakeholders.

ONE DESTINATION
WITH LIMITLESS
CONNECTIONS TO NATURE

canoeing beaches
shelling snorkeling
parasailing fishing
golfing jetskiing
boating scuba diving
bird watching
wildlife bicycle riding
kayaking
swimming

Source: Activities enjoyed in Lee County,
2012 Annual Visitor Profile



Today's travelers are environmentally conscious.

Over 79%

of U.S. adults consider themselves environmentally conscious and increasingly aware of terms such as carbon footprint and global warming.

TravelHorizons™, 2009

“The nearly universal appreciation of preserved landscapes, restored waters, and cleaner air through outdoor recreation is a modern expression of our freedom.”

— PRESIDENT RONALD REAGAN, OCTOBER 3, 1988

Travelers begin paying up to their environmental standards.

22% of American travelers express willingness to “pay higher rates or fares to patronize travel service suppliers who demonstrate environmental responsibility.” And of those 22%, half are willing to pay 10% or more for services that can demonstrate environmental responsibility.

MMGY: 2012 Portrait of the American TravelerSM



STRATEGIC IMPERATIVE #3 KEY ACTIONS:

ACTION	NEAR-TERM (6 MONTHS – 1 YEAR)	LONG-TERM (1– 3 YEARS)
<p>1 Raise awareness of the VCB as a leader in ecotourism.</p>	<ul style="list-style-type: none"> Utilize proactive communications platforms with the tourism industry and business community to clarify the VCB investment in beach nourishment and beach and shoreline facilities. Establish positioning as an eco-tourism leader by educating national and international audiences (marketing, trade shows, social media, etc.) about the VCB efforts to protect and preserve Lee County's natural assets. 	<ul style="list-style-type: none"> Within the County, promote the VCB environmental stewardship efforts as a key strategy to both manage and protect the visitation base. Generate new qualitative and quantitative data showing the benefits of environmental stewardship practices to Lee County.
<p>2 Continue to keep natural assets at the core of Lee County's marketing, promotional and branding strategies.</p>	<ul style="list-style-type: none"> Continue development and enhancement of digital products that educate, guide, introduce and explain the natural treasures of the County. Recruit more of Lee County's natural asset experts to provoke discussions within Lee County's social media outlets. Drive environmentally based conversations across all communications channels that feature user-generated content. 	<ul style="list-style-type: none"> Enhance branding by amplifying Lee County as a destination for all stages of life through the diverse offerings of its natural assets. Develop strategic promotional partnerships with national and international brands that have similar "green" brand recognition.
<p>3 Create an issues management campaign that addresses risks to the area's natural assets.</p>	<ul style="list-style-type: none"> Form a rapid response team to create a crisis communications plan and manage these issues as they arise. 	<ul style="list-style-type: none"> Identify the current and future environmental issues that may threaten Lee County's natural assets. Build a grassroots network of tourism, business, and community leaders to advocate for critical environmental issues and coalesce the community around these efforts.

STRATEGIC IMPERATIVE #4:

MAKE TOURISM A SHARED COMMUNITY IMPERATIVE

HOW DO WE SHAPE A COLLECTIVE VISION OF TOURISM?

In fulfilling its mission to serve the interests of the local economy, including all 10 geographic regions, the Lee County VCB recognizes its responsibility as the lead agency promoting the value of the tourism industry. However, each of Lee County's more than 645,000 residents (2012 Census estimate) stand to reap the economic benefits of the tourism industry, and therefore each has a stake in achieving continued industry

Visitors contribute \$2.7 billion to the local economy and create employment for one-in-five citizens.

success. Unfortunately, too many are unaware of the direct and indirect benefits tourism provides, and often, even the most educated stakeholders lose sight of tourism's collective positive impact on the community. The bottom line is that visitors contribute \$2.7 billion to the local economy and create employment for one-in-five citizens.

The tourism industry is a beacon of positive and sustainable economic growth, but without the tools to explain this value, our citizens will not be able to effectively advocate for tourism issues that affect their individual and our collective prosperity. With shared vision, we achieve shared success.

From our discussions with other DMOs of similar size facing similar challenges, we clearly identified that community engagement in the conversation about tourism is a highly successful method for gaining support for and growing tourism-focused initiatives. As we roll out all of the action items within this Plan, we are building the foundation for more transparent and informative communications with civic leaders, businesses and residents.

With shared vision, we achieve shared success.

DID YOU KNOW?

95%
of visitors to Lee County are satisfied or very satisfied with their experience.

75%
of all visitors have been to Lee County before.

77%
of first-time visitors intend to come again.

90%
of all visitors plan to tell their friends that Lee County is better than any other area of Florida.

Source: 2012 Lee County Annual Visitor Profile

Tourism is the second largest employer in Lee County



Tourism employs one in five Lee County citizens, directly and indirectly supporting the jobs of 52,257 Lee County residents in 2012.

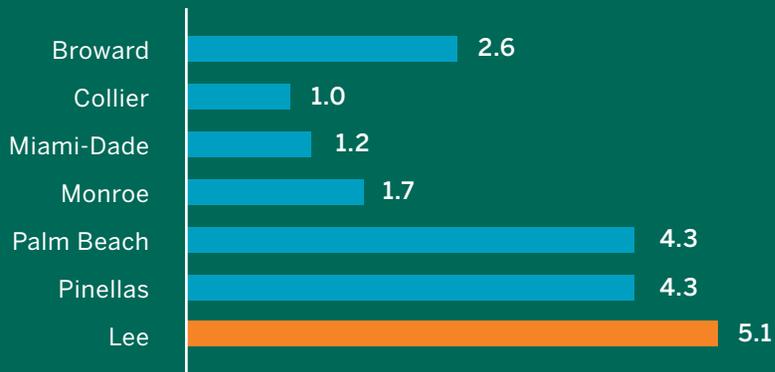
Source: 2012 Lee County Annual Report

Lee County has consistently maintained growth through the global recession, surpassing its competitors in neighboring counties.

2011 OCCUPANCY % GROWTH
JAN. 2011–JAN. 2012



2012 OCCUPANCY % GROWTH
JAN. 2012–JAN. 2013

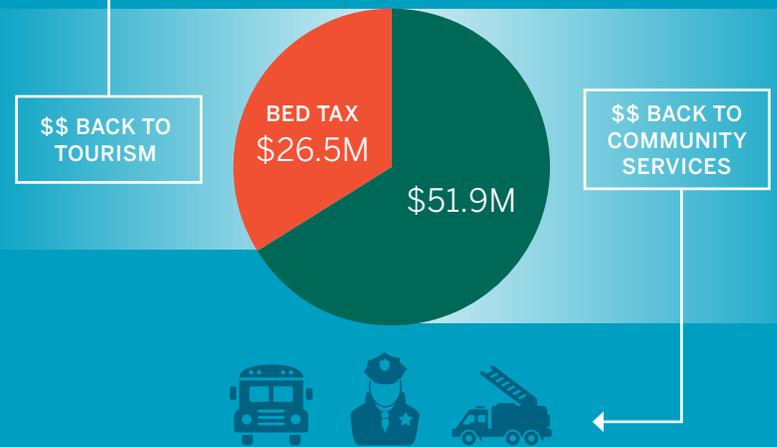


Tourism gives back to the community



SALES TAXES FROM TOURISTS

Generate
\$78.4M
to fund tourism marketing and local government services



STRATEGIC IMPERATIVE #4 KEY ACTIONS:

ACTION	NEAR-TERM (6 MONTHS – 1 YEAR)	LONG-TERM (1– 3 YEARS)
<p>1 Develop the “tourism story” for Lee County.</p>	<ul style="list-style-type: none"> Utilize existing research to better define and articulate the case for tourism. Tell Lee County’s “tourism story” through a community awareness campaign that includes fact sheets and testimonials. Integrate a module into the “Guests First” customer service program focused on customer education about Lee County. 	<ul style="list-style-type: none"> Conduct new survey research to gauge citizens’ understanding of and attitudes toward tourism. Continually update the “tourism story” by tailoring community messages and platforms based on new trends and data.
<p>2 Educate and engage residents and local businesses about the economic benefits of tourism.</p>	<ul style="list-style-type: none"> Utilize local media (earned and editorial) as a tool to introduce trends in the tourism landscape and highlight Lee County’s unique strengths. Recruit tourism and business leaders to tell their stories and become informal ambassadors via the VCB’s Guests First customer satisfaction training program. 	<ul style="list-style-type: none"> Create a platform for residents to use their knowledge and passion to spread the word about Lee County tourism. Create a long-term comprehensive communications strategy to raise awareness of and give credibility to the value of tourism.
<p>3 Develop community-wide objectives for intra-county transit.</p>	<ul style="list-style-type: none"> Begin discussions with LeeTran and local community leaders about collecting and analyzing existing data about traffic, public transit, and future plans for Lee County transportation infrastructure. 	<ul style="list-style-type: none"> Advocate and facilitate ROI study for transit that defines the costs and opportunities of increased transit options and includes community input. Collaborate with Transit to inform visitors about various transit options. Advocate and help facilitate opportunities for increased transit options, including community input.

CONCLUSION

The Lee County VCB has long played a lead role in bringing together the varied interests of the travel and tourism industry. With this Plan we establish a roadmap to guide the efforts and investments of the VCB while creating a collective vision of tourism — as a vital economic growth driver — for the industry and the community at-large.

The strategies and actions in the Plan represent the interests of the VCB, along with the broader tourism industry, and provide a framework for action, as well as a platform for communication, education, advocacy and dialogue. It is our hope that as a result of this work the industry can better speak with one voice, and that our ongoing communications will create an understanding of the tourism imperative by all who reside here.

*Lee County is paving a new pathway
for growth, aimed at achieving
one bold overarching goal:
Increasing visitor spending from
\$2.7 billion in 2012 to \$3 billion by 2016.*

By pursuing the imperatives set out in this plan, Lee County is paving a new pathway for growth, aimed at achieving one overarching goal: Increasing visitor spending from \$2.7 billion in 2012 to \$3 billion by 2016.

This 11% increase in visitor spending will translate into significant economic impact for our County:

- **\$300 million of incremental revenue flowing into the Lee County economy**
- **4,000 new jobs**
- **\$120 million in additional resident household income**
- **\$13 million more to fund local government and civic services**
- **\$26 million in incremental revenues to the State**

Meeting this goal would bring in \$8.2 million per day in visitor expenditures, which would directly support local hotels and restaurants, retailers, and important arts and cultural institutions. It will also indirectly strengthen practically every segment of our County's economy and help fill gaps in local and state government funding.

We will also aim to increase RevPAR by 15% and increase our off-peak Fall visitation by 15% as well. With newly developed strategies in hand, we are focused on reaching these objectives.

We view the Plan as a living document whose continual review will provide the structure to guide long-term strategy while giving us the flexibility to pivot and respond to new, unforeseen challenges and opportunities that arise during the Plan period.

We are proud of our work and are committed to continuing to drive benefits for our industry, our environment, and our community.

More information about Lee County can be found at www.leevcb.com.



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