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

Fall 2014 Visitor Profile and Occupancy Analysis

February 12, 2015

Prepared for:

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

Prepared by:

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Executive Summary
Fall 2014
(October, November, and December)

Throughout this report, statistically significant differences between responses for 2013 and 2014 at the 95% confidence level are noted with an A,B lettering system.

For example:

2013 A	2014 B
70%	80%A

In the table above 80% in Column B is statistically greater than 70% in Column A.

Executive Summary

Visitation Estimates

- The fall season of 2014 brought approximately 708,000 paid accommodation visitors to Lee County. An additional 412,000 visitors stayed with friends or relatives, for an estimated total of 1.1 million visitors during the season.
- Visitation among fall 2014 paid accommodations guests was up significantly from 2014 while visitors staying with friends or relatives was down by 3.0%. The net result was a notable increase in total visitation from the prior year.

Estimated Visitation	Fall 2013	Fall 2014	% Change
Paid Accommodations	611,894	708,474	15.8%
Friends/Relatives	424,920	411,978	-3.0%
Total Visitation	**1,036,814**	**1,120,452**	**8.1%**

Visitor Expenditures

- During fall 2014 visitors spent an estimated $627.1 million during their stay in Lee County, a 7.8% increase from last fall ($581.7 million) and the highest observed for fall season since 2008.
- Expenditures among fall 2014 paid accommodations guests grew 12.7%, amounting to $426.0 million (68% of the total). Those staying with friends or relatives contributed the remaining $201.0 million – about the same level as last year.

Estimated Expenditures	Fall 2013	Fall 2014	% Change
Paid Accommodations	$378,085,986	$426,028,481	12.7%
Friends/Relatives	$203,616,129	$201,036,899	-1.3%
Total Expenditures	**$581,702,115**	**$627,065,380**	**7.8%**

Note: Fall season refers to the period including October, November, and December when referenced throughout this report.

Visitor Origin

- Two-thirds of fall 2014 visitors staying in paid accommodations are from the United States (65%). However, international visitors make up a larger share of those staying in paid accommodations than they did last fall. The majority came from Germany (12%), followed by the UK (9%) and Canada (7%).

- Almost half of domestic paid accommodations guests came from the Midwest (45%). About as many came from the South (26%) and Northeast (23%) regions combined. Visitors from the West were far fewer in numbers (6%).

- During fall 2014, the Lee County lodging industry drew the largest proportion of its domestic visitors from the Chicago and New York DMAs, followed by Boston, Indianapolis, and Detroit.

Fall 2014 Top DMAs (Paid Accommodations)		
Chicago	7%	33,058
New York	7%	31,405
Boston	6%	26,447
Indianapolis	4%	19,835
Detroit	4%	18,182
Cleveland-Akron	3%	14,876
Columbus, OH	3%	13,223
Minneapolis-Saint Paul	3%	13,223
Philadelphia	3%	11,570
Orlando-Daytona Beach-Melbourne	2%	9,917

Visitors Staying in Paid Accommodations

	%		Visitor Estimates		% Change
Fall Season	**2013**	**2014**	**2013**	**2014**	
Country of Origin					
United States	71%	65%	433,581	462,815	6.7%
Germany	11%	12%	65,694	88,220	34.3%
UK	6%	9%	34,724	62,433	79.8%
Canada	5%	7%	32,847	50,218	52.9%
Scandinavia	2%	2%	11,262	14,930	32.6%
Switzerland	2%	1%	12,200	8,143	-33.3%
BeNeLux	1%	1%	5,631	6,786	20.5%
Latin America	<1%	1%	1,877	4,072	116.9%
France	1%	<1%	6,569	2,714	-58.7%
Ireland	<1%	<1%	1,877	1,357	-27.7%
Other International	<1%	1%	2,815	6,786	141.0%
No Answer	<1%	-	2,815	-	-

Visitors Staying in Paid Accommodations

	%		Visitor Estimates		% Change
Fall Season	**2013**	**2014**	**2013**	**2014**	
U.S. Region of Origin					
Florida	6%	9%	27,216	42,976	57.9%
South (including Florida)	19%	26%	80,710	119,010	47.5%
Midwest	48%	45%	210,221	208,267	-0.9%
Northeast	25%	23%	109,803	107,439	-2.2%
West	3%	6%	14,077	28,100	99.6%
No Answer	4%	-	18,770	-	-

Note: The percentage of visitors by origin market is based on data collected from visitors in the Visitor Profile Survey. Respondents who did not answer the area of residence questions are excluded when calculating these percentages.

Trip Planning

- The majority of 2014 fall visitors planned their Lee County trip well in advance. Seven in ten began talking about their Lee County trip *three or more months* in advance and six in ten chose the destination within that timeframe. Fewer visitors, however made their lodging reservations within that window.
    - 72% started talking about trip 3+ months in advance (vs. 76% in 2013)
    - 64% chose Lee County for trip 3+ months in advance (vs. 70% in 2013)
    - 56% made lodging reservation 3+ months in advance (vs. 58% in 2013)

- The internet continues to be a popular planning tool among Lee County visitors with 85% of fall visitors claiming to have visited one or more websites during the planning process. Visitors most often mention using airline websites (46%), followed by search engines (26%), hotel websites (25%), or Trip Advisor (25%) when preparing for their trip.

- Similar to last year, six in ten fall 2014 visitors indicate they use their laptop to access destination planning information online (58% vs. 59% in 2013). Mobile devices continue to be on the rise, with half of fall visitors accessing trip planning content on a smartphone (47%) and about as many saying they use a tablet (44% vs. 35% in 2013).

- Fall 2014 visitors most often cited *warm weather* (86%), *peaceful/relaxing* (82%), and *white sandy beaches* (76%) as the attributes that positively influenced their decision to visit Lee County. A *safe destination* (69%) and *clean, unspoiled environment* (68%) were also motivating influences.

Visitor Profile

- Three-quarters of visitors flew to the destination (76%), and most arrived at Southwest Florida International Airport (84%) – a similar pattern as observed last year, although the proportion of fall 2013 visitors using RSW was slightly lower (79%).

- On average fall 2014 visitors stayed in Lee County for about 8 days. The majority reported they came to Lee County for a vacation trip (78%). However, there was an increase in the proportion reporting they were visiting friends or relatives (35% vs. 24% in 2013). Regardless their reason for visiting Lee County, nearly three-quarters were repeat visitors (68%) who averaged five trips to Lee County in the past five years.

- Among the fall 2014 visitors surveyed, one-third reported they were staying in hotel/motel/resort properties (33%) and the same proportion said they were staying in condo/vacation home properties (33%). Among those staying in paid accommodations, nearly all reported that the quality of their lodging either *met expectations* (54%) or *far exceeded/exceeded expectations* (41%). Worth noting, there was a decrease in *far exceeded/exceeded* mentions from last year, with a corresponding increase in *met expectations* mentions.

Visitor Profile (cont'd)

- The top activities enjoyed in Lee County during fall 2014 included: *beaches* (89%), *relaxing* (71%), *dining out* (70%), and to a lesser extent, *shopping* (55%) and *swimming* (50%). When asked which attractions they were visiting in Lee County, *beaches* received the highest level of mentions (78%). Half of fall visitors took a day trip outside of Lee County (49%), and most traveled to Naples.

- The majority of visitors indicated they were either *very satisfied* or *satisfied* with their visit (54% and 37% respectively), however, there was a decline in *very satisfied* ratings from last year (66%). Still, nine in ten reported they intend to return to Lee County (87%), with more than half of them suggesting they will do so next year (59%). Many visitors also said they will spread the word about their positive experiences, with 84% conveying they will recommend Lee County over other areas in Florida.

- When asked what they liked *least* about the area, two in ten fall 2014 visitors cited *traffic* (21%). Mentions of *insects, beach seaweed,* and *Red Tide* as disliked features were much lower than in fall 2013.

- The demographic composition of fall 2014 visitors can be summarized as follows:

    - 51 years of age on average
    - $103, 900 household income on average
    - 72% married
    - 42% traveling as a couple
    - 30% traveling as a family
    - 17% traveling *with* children
    - 3 people in travel party on average

Lodging Industry Assessments

- For the Lee County lodging industry overall, *available* room nights showed no change from Fall 2013 to 2014, however, *occupied* room nights increased 8.2%. Hotel/motel/resort and RV/campground properties saw sizeable growth in the number of *occupied* room nights, whereas condo/vacation homes saw very little change.

	Occupied Room Nights			Available Room Nights		
Fall Season	2013	2014	% Change	2013	2014	% Change
Hotel/Motel/Resort/B&B	581,258	622,622	7.1%	1,020,774	1,026,439	0.6%
Condo/Cottage/Vacation Home	231,941	234,029	0.9%	401,012	378,671	-5.6%
RV Park/Campground	202,089	242,004	19.8%	425,749	434,947	2.2%
Total	**1,015,288**	**1,098,655**	**8.2%**	**1,847,535**	**1,840,057**	**-0.4%**

- The industry-wide average occupancy rate in Lee County increased from 55.0% to 59.7% year-over-year (+8.7%). All three property categories experienced prominent growth – 6.5% for hotels/motels/resorts, 6.9% for condos/vacation homes, and 17.2% for RV parks/campgrounds – when compared to last fall.
- Lee County's average daily rate rose 2.4% year-over-year. Hotels/motels/resorts and condos/vacation homes saw an increase (6.1% and 3.8% respectively) while RV parks/campgrounds saw a decrease in ADR versus last fall.
- The gains in both average occupancy rate and ADR for the Lee County lodging industry produced a strong increase in RevPAR from fall 2013 to fall 2014 (+11.3%). Year-over-year RevPAR performance was very favorable for all categories.

	Average Occupancy Rate			Average Daily Rate			RevPAR		
Fall Season	2013	2014	% Change	2013	2014	% Change	2013	2014	% Change
Hotel/Motel/Resort/B&B	56.9%	60.7%	6.5%	$122.06	$129.49	6.1%	$69.50	$78.55	13.0%
Condo/Cottage/Vacation Home	57.8%	61.8%	6.9%	$154.33	$160.18	3.8%	$89.26	$99.00	10.9%
RV Park/Campground	47.5%	55.6%	17.2%	$49.52	$46.58	-5.9%	$23.50	$25.91	10.3%
AVERAGE	**55.0%**	**59.7%**	**8.7%**	**$114.99**	**$117.76**	**2.4%**	**$63.19**	**$70.31**	**11.3%**

Lodging Industry Assessments (cont'd)

- According to reports from Lee County property managers, reservations for winter 2015 (January, February, and March) suggest growth in business performance for the coming season. Six-in-ten managers responding reported that their total level of reservations for the first quarter of 2015 are *up* over the same period the prior year (63% vs. 65% last year). Another quarter said reservation for the next three months are the *same* (28% vs. 23% last year), and very few claimed that their reservations are *down* for the next three months (8% vs. 10% last year).

Fall 2014 Lee County Snapshot

Total Visitation				
	%		Visitor Estimates	
Fall Season	2013	2014	2013	2014
Paid Accommodations	59%	63%	611,894	708,474
Friends/Relatives	41%	37%	424,920	411,978
Total Visitation			**1,036,814**	**1,120,452**

Total Visitor Expenditures			
Fall Season	2013	2014	% Change
Total Visitor Expenditures	$581,702,115	$627,065,380	7.8%
Paid Accommodations	$378,085,986	$426,028,481	12.7%

Visitor Origin - Visitors Staying in Paid Accommodations				
	%		Visitor Estimates	
Fall Season	2013	2014	2013	2014
Florida	6%	9%	27,216	42,976
United States	71%	65%	433,581	462,815
Germany	11%	12%	65,694	88,220
UK	6%	9%	34,724	62,433
Canada	5%	7%	32,847	50,218
Other International	7%	6%	42,232	44,789
No Answer	<1%	-	2,815	-

First-Time/Repeat Visitors to Lee County		
Fall Season	2013	2014
First-time	22%	30%
Repeat	78%	68%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
Fall Season	2013	2014	% Change	2013	2014	% Change	2013	2014	% Change
Hotel/Motel/Resort/B&B	56.9%	60.7%	6.5%	$122.06	$129.49	6.1%	$69.50	$78.55	13.0%
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AVERAGE	**55.0%**	**59.7%**	**8.7%**	**$114.99**	**$117.76**	**2.4%**	**$63.19**	**$70.31**	**11.3%**

Calendar YTD 2014 Lee County Snapshot

Total Calendar Year Visitation				
	%		Visitor Estimates	
	2013	2014	2013	2014
Paid Accommodations	56%	60%	2,703,012	3,015,974
Friends/Relatives	44%	40%	2,094,921	1,987,596
Total Visitation			**4,797,933**	**5,003,570**

Total Visitor Expenditures			
	2013	2014	% Change
Total Visitor Expenditures	$2,768,140,146	$2,865,097,777	3.5%
Paid Accommodations	$1,818,293,459	$1,938,003,424	6.6%

Visitor Origin - Visitors Staying in Paid Accommodations				
	%		Visitor Estimates	
	2013	2014	2013	2014
Florida	9%	7%	194,700	160,947
US	77%	76%	2,072,309	2,279,842
Germany	8%	8%	209,199	250,055
Canada	5%	6%	139,811	176,059
UK	4%	5%	100,457	139,061
Other International	6%	6%	170,880	170,956
No Answer	<1%	-	10,356	-

First-Time/Repeat Visitors to Lee County		
	2013	2014
First-time	24%	28%
Repeat	76%	71%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2013	2014	% Change	2013	2014	% Change	2013	2014	% Change
Hotel/Motel/Resort/B&B	63.7%	67.0%	5.1%	$139.54	$148.75	6.6%	$88.94	$99.68	12.1%
Condo/Cottage/Vacation Home	63.5%	66.2%	4.3%	$173.03	$184.71	6.7%	$109.82	$122.31	11.4%
RV Park/Campground	50.2%	51.5%	2.6%	$49.37	$50.78	2.9%	$24.79	$26.17	5.6%
AVERAGE	**60.4%**	**63.0%**	**4.3%**	**$129.53**	**$136.98**	**5.7%**	**$78.29**	**$86.34**	**10.3%**

Visitor Profile Analysis
Fall 2014

A total of 924 interviews were conducted with visitors in Lee County during the fall months of October, November, and December 2013. A total sample of this size is considered accurate to plus or minus 3.2 percentage points at the 95% confidence level.

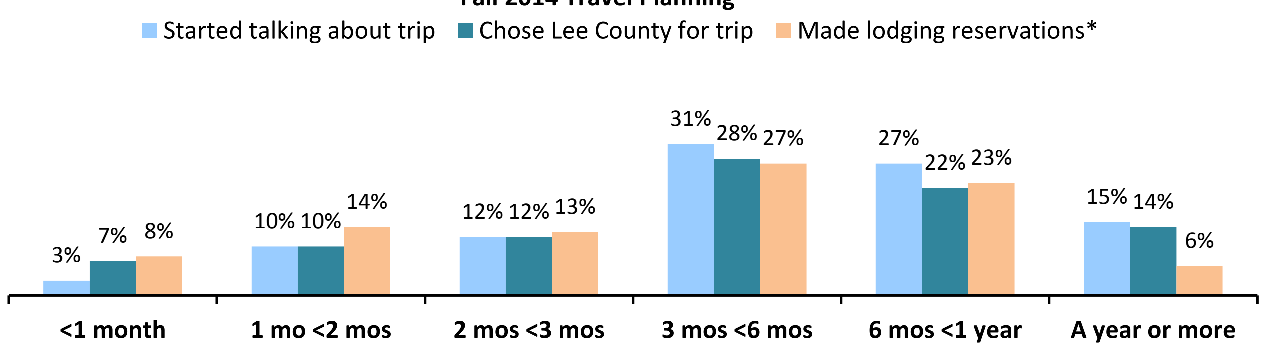
A total of 921 interviews were conducted with visitors in Lee County during the fall months of October, November, and December 2014. A total sample of this size is considered accurate to plus or minus 3.2 percentage points at the 95% confidence level.

Travel Planning

	Started Talking About Trip		Chose Lee County for Trip		Made Lodging Reservations*	
Fall Season	2013	2014	2013	2014	2013	2014
	A	B	A	B	A	B
Total Respondents	**924**	**921**	**924**	**921**	**651***	**521***
Less than 3 months (NET)	22%	25%	26%	30%	37%	34%
<1 month	2%	3%	4%	7%a	7%	8%
1 month - <2 months	9%	10%	11%	10%	16%	14%
2 months - <3 months	11%	12%	11%	12%	14%	13%
3 months or more (NET)	76%b	72%	70%b	64%	58%	56%
3 months - <6 months	27%	31%	26%	28%	27%	27%
6 months - <1 year	30%	27%	25%	22%	23%	23%
A year or more	19%b	15%	19%b	14%	8%	6%
No Lodging Reservations Made	N/A	N/A	N/A	N/A	4%	6%b
No Answer	2%	3%	4%	6%a	1%	4%b

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?

Fall 2014 Travel Planning



* Base: Among those staying in paid accommodations

Travel Planning

Devices Used to Access Destination Planning Information		
Fall Season	2013	2014
	A	B
Total Respondents	**924**	**921**
Any (NET)	95%	96%
Laptop computer	59%	58%
Smartphone	42%	47%a
Tablet	35%	44%a
Desktop computer	43%	42%
E-Reader	5%	4%
Other portable device	1%	1%
None of these	4%	4%
No Answer	<1%	1%

Q5. Which of the following devices, if any, do you typically use to access destination planning information available online? (Please mark ALL that apply.)

Travel Websites Visited		
Fall Season	2013	2014
	A	B
Respondents who used a device to plan	**880**	**882**
Visited web sites (net)	87%	85%
Airline websites	43%	46%
Search Engines	28%	26%
Hotel websites	29%b	25%
Trip Advisor	21%	25%
Booking websites	33%b	21%
Vacation rental websites*	N/A	20%
Visit Florida	9%	12%a
www.FortMyers-Sanibel.com	15%b	9%
AAA	5%	7%
Facebook	4%	5%
Other	14%b	8%
None/Didn't visit websites	12%	13%
No Answer	1%	2%

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

* Note: Response option added in January 2014.

Travel Planning

Travel Information Requested		
Fall Season	2013	2014
	A	B
Total Respondents	**924**	**921**
Requested information (NET)	31%b	26%
Hotel Web Site	17%b	9%
VCB website	8%b	5%
Call hotel/motel/condo	6%b	4%
Visitor Guide	3%	4%
E-Newsletter	1%	1%
Call local Chamber of Commerce	1%	<1%
Call VCB	<1%	<1%
Magazine Reader Service Card	<1%	<1%
Other	7%	10%a
None/Did not request information	65%	70%a
No Answer	4%	4%

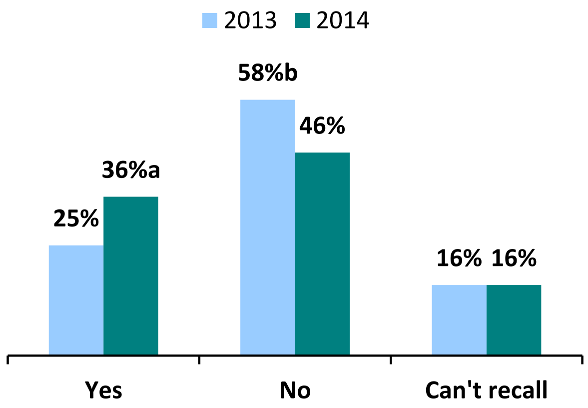
Q7: For this trip, did you request any information about our area by: (Please mark ALL that apply.)

Recall of Lee County Promotions		
Fall Season	2013	2014
	A	B
Total Respondents	**924**	**921**
Yes	25%	36%a
No	58%b	46%
Can't Recall	16%	16%
No Answer	1%	1%

Q8: Over the past six months, have you seen, read or heard any travel stories, advertising or promotions for The Beaches of Fort Myers & Sanibel area? *

* Note: Question wording changed in January 2014. Therefore, results are not directly comparable to 2013.

Recall of Promotions

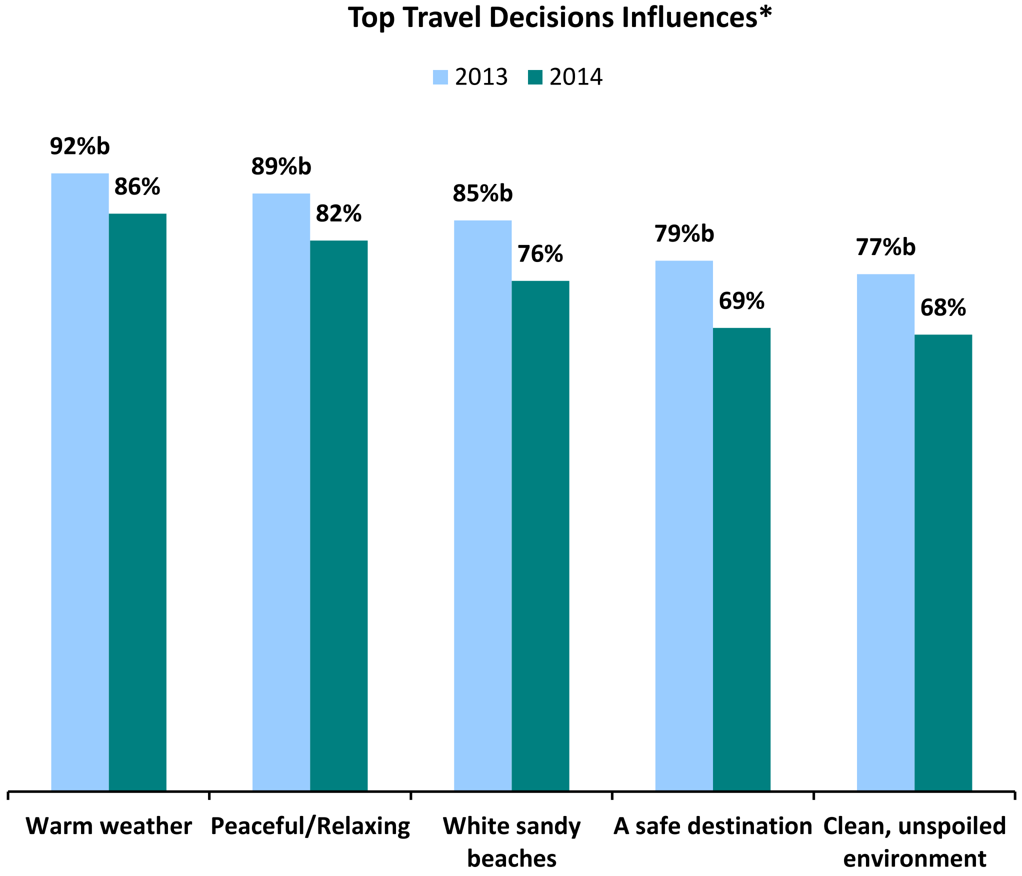


Travel Planning

Travel Decision Influences*		
Fall Season	2013	2014
	A	B
Total Respondents	**924**	**921**
Warm weather	92%b	86%
Peaceful/Relaxing	89%b	82%
White sandy beaches	85%b	76%
A safe destination	79%b	69%
Clean, unspoiled environment	77%b	68%
Convenient location	72%b	64%
Good value for the money	69%b	61%
Plenty to see and do	60%	60%
Reasonably priced lodging	64%b	52%
Affordable dining	57%b	52%
A "family" atmosphere	56%b	48%
Upscale accommodations	59%b	47%

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

Fall Season	2013	2014
	A	B
Total Respondents	**924**	**921**
Fly	76%	76%
Drive a personal vehicle	17%	17%
Drive a rental vehicle	5%	6%
Drive an RV	1%	1%
Travel by bus	<1%	-
Other/No Answer	1%	1%

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

Frequency of Using SWFL Int'l (Past Year)

Fall Season	2013	2014
	A	B
Total Respondents	**924**	**921**
<u>One or more trips</u>	<u>61%</u>	<u>63%</u>
1 trip	38%	37%
2 to 3 trips	19%	22%
4 to 5 trips	2%	3%
6 or more trips	2%	2%
None/No Answer	39%	37%

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

Airport Used

Fall Season	2013	2014
	A	B
Respondents who flew into the area	**704**	**696**
SW Florida Int'l (Fort Myers)	79%	84%a
Miami Int'l	6%b	3%
Orlando Int'l	5%	3%
Punta Gorda*	N/A	3%
Tampa Int'l	5%b	2%
Ft. Lauderdale Int'l	1%	3%a
West Palm Beach Int'l**	<1%	N/A
Sarasota / Bradenton**	<1%	N/A
Other	3%b	1%
No Answer	1%	1%

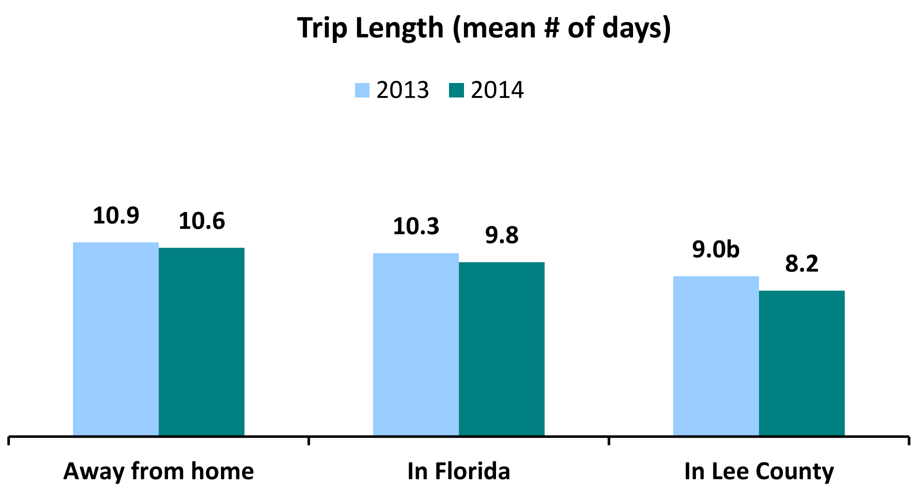
Q2: At which Florida airport did you land?

* Note: Response option added in January 2014.
** Note: Response options removed in January 2014.

Trip Profile

Trip Length Mean # of Days		
Fall Season	2013	2014
	A	B
Total Respondents	**924**	**921**
Away from home	10.9	10.6
In Florida	10.3	9.8
In Lee County	9.0b	8.2

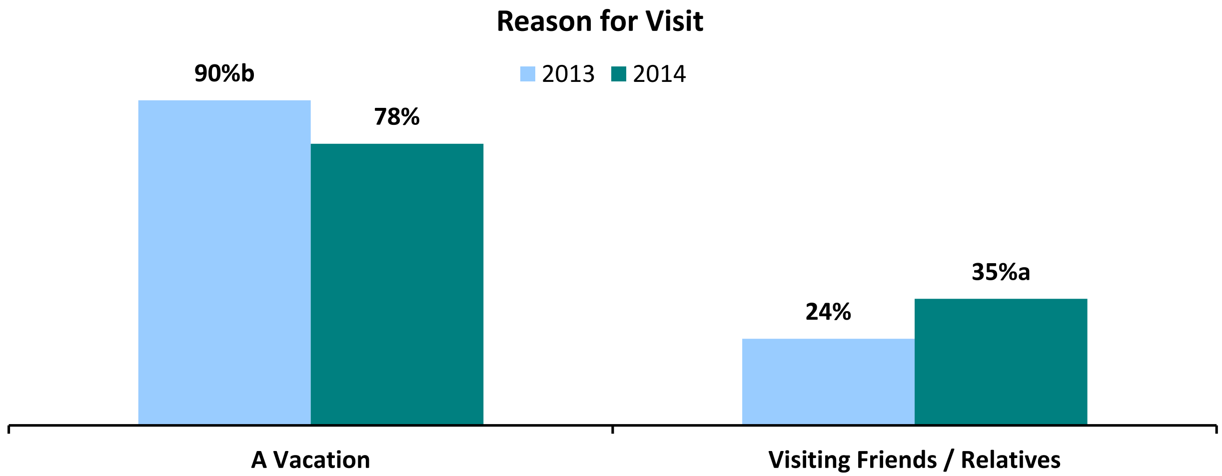
Q4a/b/c: On this trip, how many days will you be:



Trip Profile

Reason(s) for Visit		
Fall Season	2013	2014
	A	B
Total Respondents	**924**	**921**
A Vacation	90%b	78%
Visiting Friends/Relatives	24%	35%a
Personal Business	3%	3%
Sporting Event(s)	3%	1%
Other Business Trip	1%	1%
A Conference/Meeting	1%	1%
A Convention/Trade Show	<1%	1%
Other/No Answer (NET)	1%	2%a

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	
Fall Season	**2013**	**2014**	**2013**	**2014**	**2013**	**2014**	**2013**	**2014**
	A	**B**	**A**	**B**	**A**	**B**	**A**	**B**
Total Respondents	**924**	**921**	**40***	**39***	**601**	**468**	**248**	**285**
First-time visitor	22%	30%a	23%	21%	18%	19%	32%	50%a
Repeat visitor	78%b	68%	77%	77%	82%	80%	67%b	47%
No Answer	<1%	2%a	-	3%	<1%	1%	1%	2%

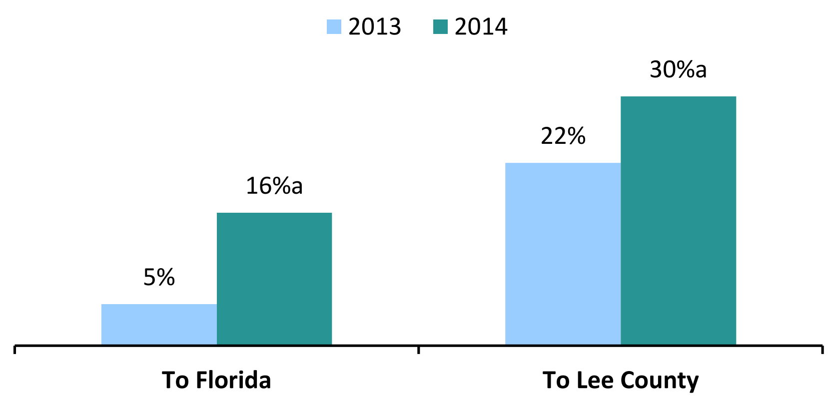
Q15: Is this your first visit to Lee County?
**Note: Small sample size. (N<70) Please interpret results with caution.*
***N/A: Insufficient number of responses for statistical analysis (N<30).*

First Time Visitors to Florida

Fall Season	**2013**	**2014**
	A	**B**
Total Respondents	**924**	**921**
Yes, first-time visitor	5%	16%a
No	90%b	78%
No answer	1%	2%a
*FL Residents**	4%	4%

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.*

First Time Visitors

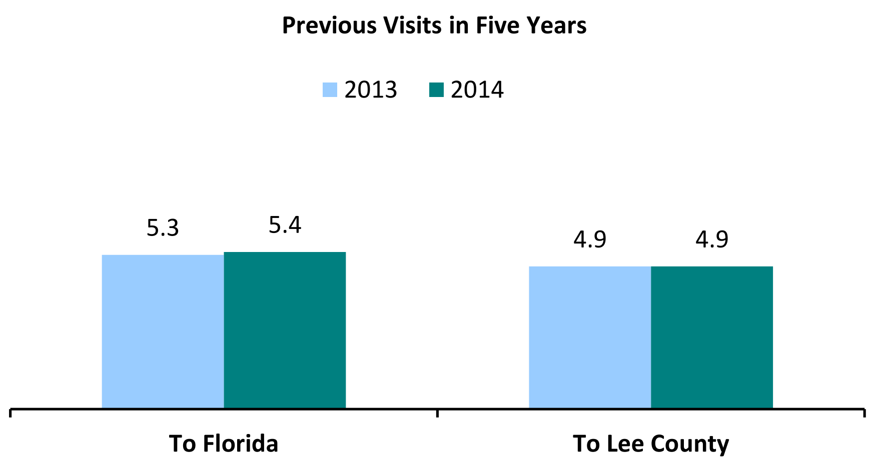


dpa Davidson Peterson Associates

Trip Profile

Previous Visits in Five Years				
	Mean # of Visits to Florida		Mean # of Visits to Lee County	
Fall Season	**2013**	**2014**	**2013**	**2014**
	A	**B**	**A**	**B**
Base: Repeat Visitors	**830** (FL res. Excl)	**721**(FL res. Excl)	**716**	**627**
Number of visits	5.3	5.4	4.9	4.9

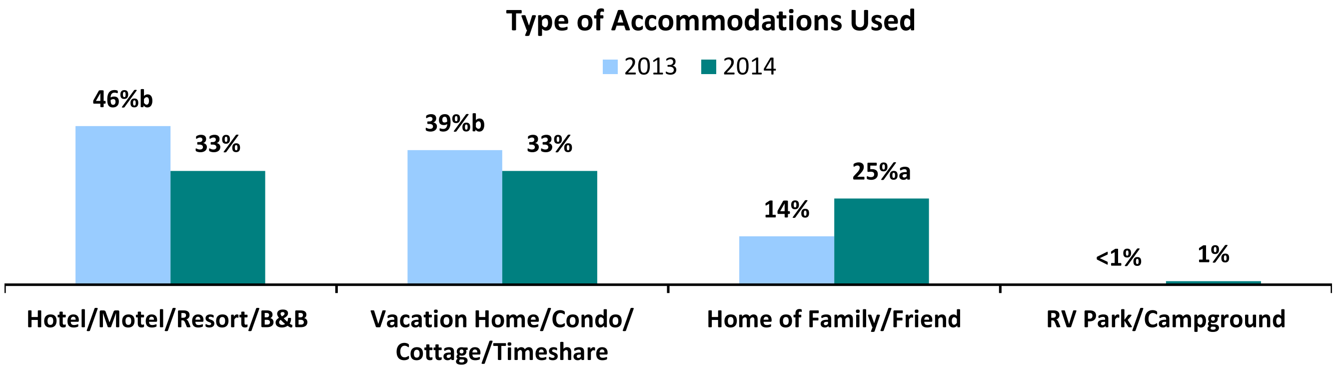
Q14: Over the past five (5) years, how many times have you visited Florida?
Q16: Over the past five (5) years, how many times have you visited Lee County?



Trip Profile

Type of Accommodations Used		
Fall Season	2013	2014
	A	B
Total Respondents	**924**	**921**
Hotel/Motel/Resort/B&B (NET)	**46%b**	**33%**
Hotel/motel/historic inn	23%	22%
Resort	22%b	11%
Bed and Breakfast	-	<1%
Vacation Home/Condo/Cottage/Timeshare (NET)	**39%b**	**33%**
Rented	24%	22%
Owned	10%b	7%
Borrowed	5%	4%
RV Park/Campground (NET)	**<1%**	**1%**
Home of family or a friend	**14%**	**25%a**
Daytripper (No Accommodations)	**<1%**	**7%a**

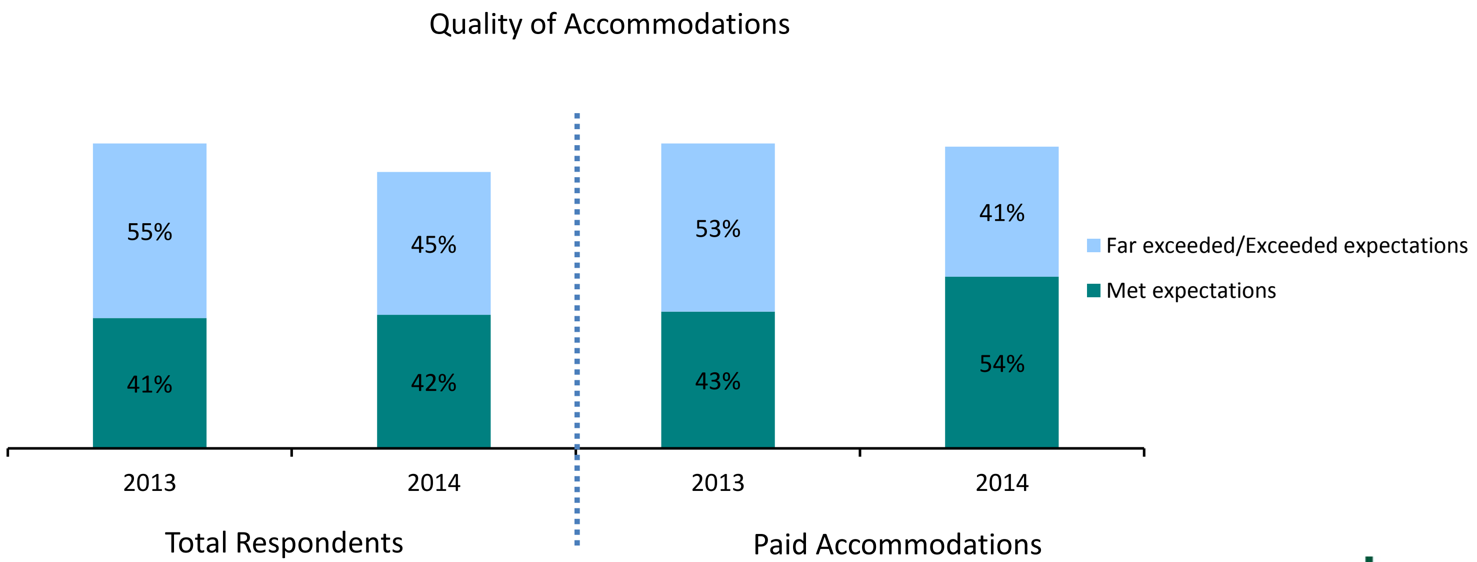
Q20: Are you staying overnight (either last night or tonight):



Trip Profile

Quality of Accommodations				
	Total Respondents		Paid Accommodations	
Fall Season	2013	2014	2013	2014
	A	B	A	B
Respondents	**924**	**921**	**651**	**521**
Far exceeded/Exceeded expectations	55%b	45%	53%b	41%
Met your expectations	41%	42%	43%	54%a
Did not meet/Far below expectations	1%	3%a	2%	3%
No Answer	3%	10%a	2%	2%

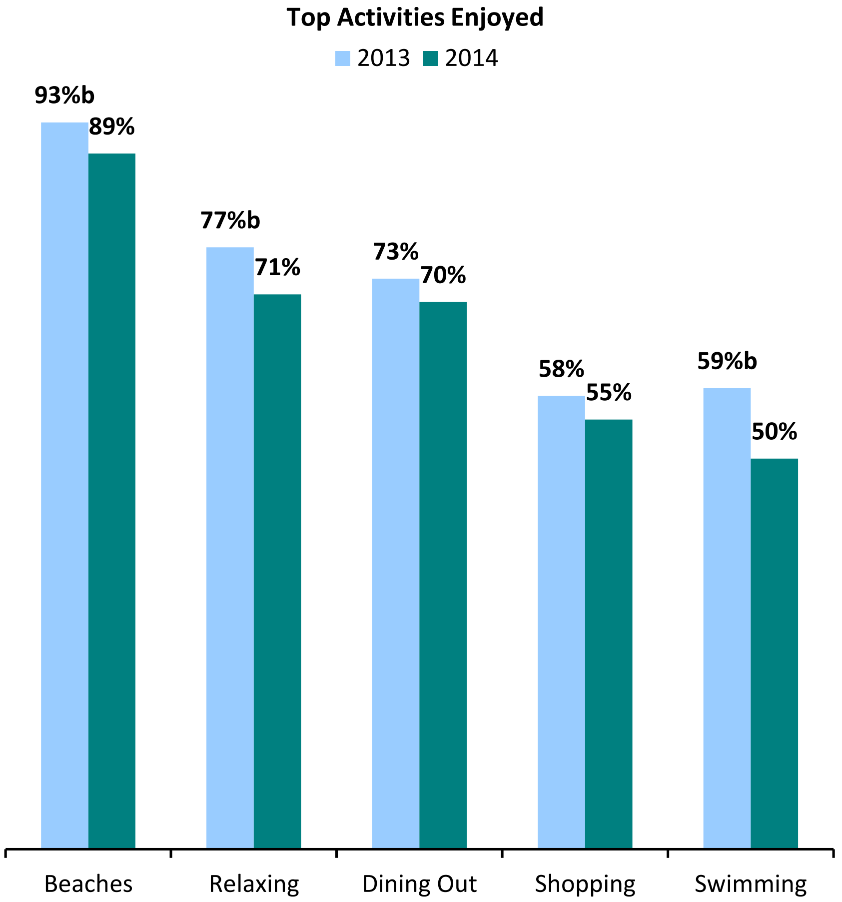
Q21: How would you describe the quality of your accommodations? Do you feel they:



Trip Activities

Activities Enjoyed		
Fall Season	2013	2014
	A	B
Total Respondents	**924**	**921**
Beaches	93%b	89%
Relaxing	77%b	71%
Dining Out	73%	70%
Shopping	58%	55%
Swimming	59%b	50%
Sightseeing	34%	41%a
Shelling	36%	34%
Visiting Friends/Relatives	25%	33%a
Watching Wildlife	25%	27%
Attractions	24%	25%
Bicycle Riding	18%	18%
Photography	22%b	17%
Birdwatching	17%	15%
Exercise/Working Out	16%	15%
Bars/Nightlife	17%	15%
Golfing	11%	14%a
Boating	9%	12%
Fishing	9%	9%
Kayaking/Canoeing	7%	9%
Miniature Golf	6%	8%
Guided Tour	5%	6%
Cultural Events	4%	6%a
Parasailing /Jet Skiing	4%	5%
Tennis	5%	4%
Sporting Event	3%	3%
Scuba Diving / Snorkeling	2%	1%
Other	2%	3%
No Answer	1%	2%a

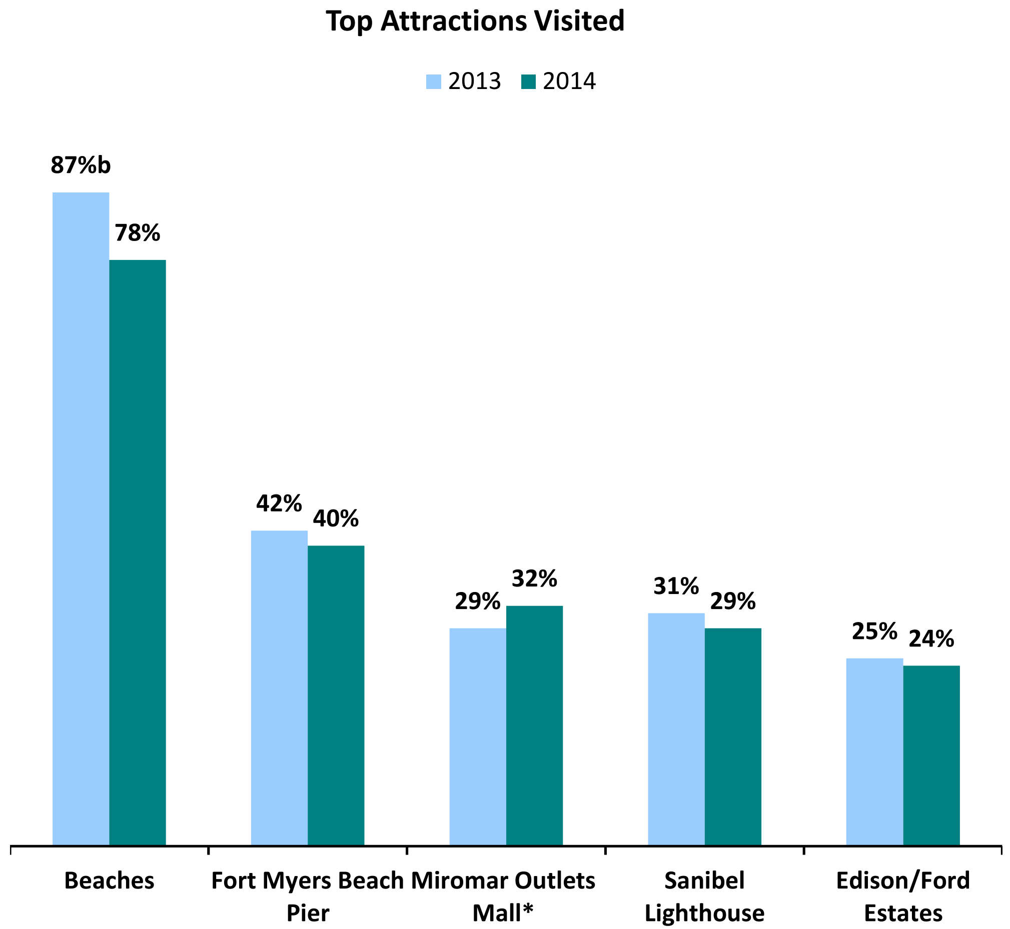
Q23: What activities or interests are you enjoying while in Lee County?
(Please mark ALL that apply.)



Trip Activities

Attractions Visited		
Fall Season	2013	2014
	A	B
Total Respondents	**924**	**921**
Beaches	87%b	78%
Fort Myers Beach Pier	42%	40%
Miromar Outlets Mall	29%	32%
Sanibel Lighthouse	31%	29%
Edison/Ford Estates	25%	24%
Tanger Outlet Center	25%	21%
Coconut Point Mall	16%	13%
Periwinkle Place	15%	12%
Ding Darling National Wildlife Refuge	17%b	11%
Bell Tower Shops	12%	11%
Gulf Coast Town Center	10%	11%
Edison Mall	10%	9%
Shell Factory and Nature Park	12%b	6%
Manatee Park	5%	5%
Bailey-Matthews Shell Museum	4%b	2%
Broadway Palm Dinner Theater	3%b	1%
Barbara B. Mann Perfoming Arts Hall	1%	1%
Babcock Wilderness Adventures	1%	1%
Other	4%	5%
None/No Answer (NET)	5%	7%

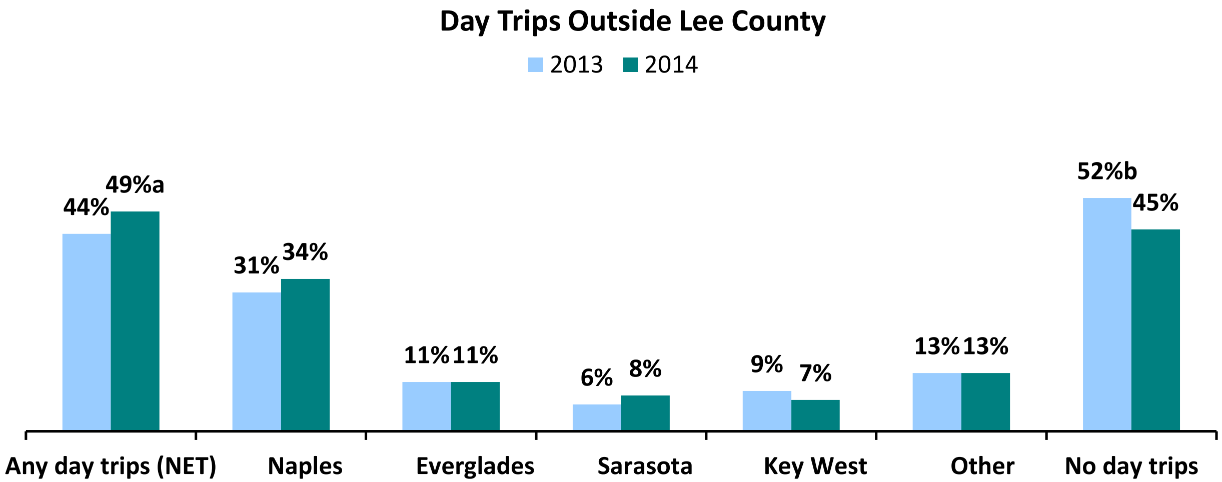
Q24. On this trip, which attractions are you visiting? *(Please mark ALL that apply.)*



Trip Activities

Day Trips Outside Lee County		
Fall Season	2013	2014
	A	B
Total Respondents	**924**	**921**
Any day trips (NET)	44%	49%a
Naples	31%	34%
Everglades	11%	11%
Sarasota	6%	8%
Key West	9%	7%
Other	13%	13%
No day trips	52%b	45%
No Answer	9%	12%a

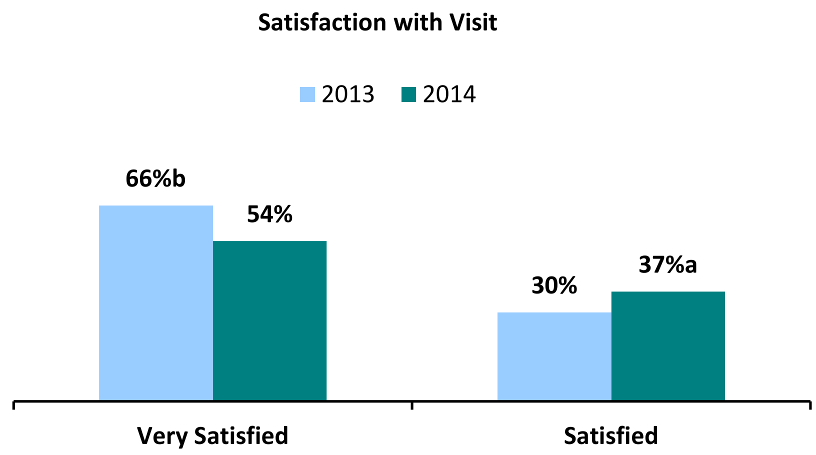
Q25: Where did you go on day trips outside Lee County?



Lee County Experience

Satisfaction with Visit		
Fall Season	2013	2014
	A	B
Total Respondents	**924**	**921**
Very Satisfied/Satisfied	96%b	91%
Very Satisfied	66%b	54%
Satisfied	30%	37%a
Neither	1%	1%
Dissatisfied/Very Dissatisfied	<1%	1%
Don't know/no answer	3%	7%a

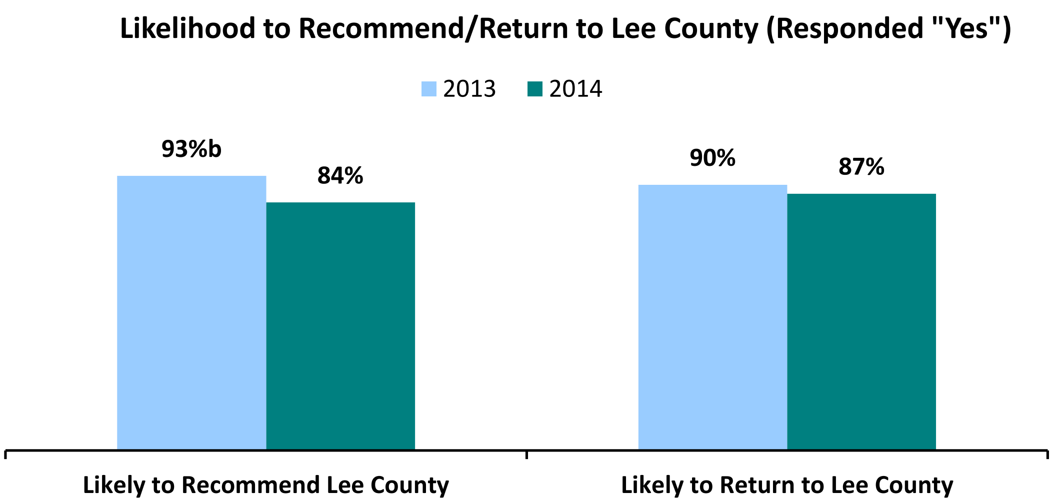
Q28: How satisfied are you with your stay in Lee County?



Future Plans

Likelihood to Recommend/Return to Lee County		
Fall Season	2013	2014
	A	B
Total Respondents	**924**	**921**
Likely to Recommend Lee County	93%b	84%
Likely to Return to Lee County	90%	87%
Base: Total Respondents Planning to Return	**832**	**805**
Likely to Return Next Year	64%	59%

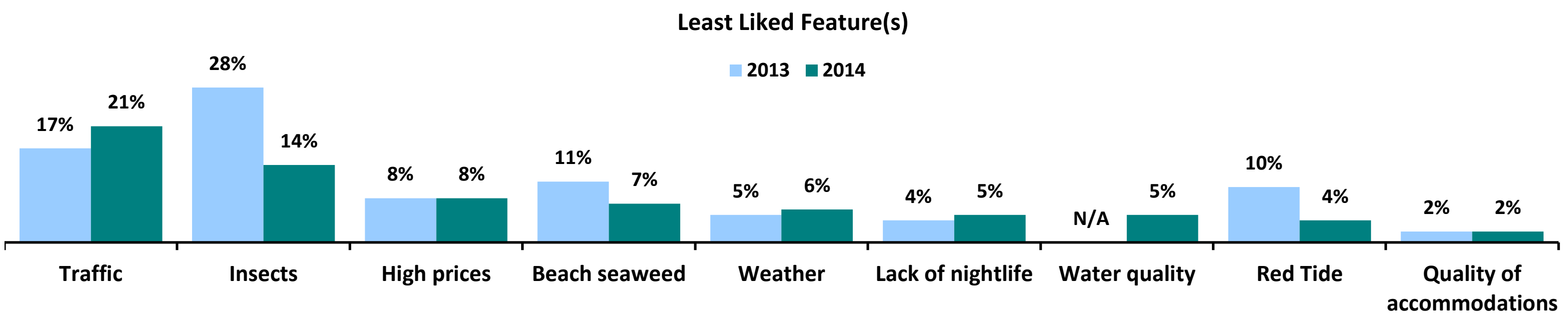
Q27: Would you recommend Lee County to a friend over other vacation areas in Florida?
Q31: Will you come back to Lee County?
Q32: Will you come back next year?



Trip Activities

Least Liked Features		
Fall Season	2013	2014
	A	B
Total Respondents	**924**	**921**
Traffic	17%	21%
Insects	28%b	14%
High prices	8%	8%
Beach seaweed	11%b	7%
Weather	5%	6%
Lack of nightlife	4%	5%
Water quality*	N/A	5%
Red Tide	10%b	4%
Quality of accommodations	2%	2%
Other	5%	6%
Nothing/No Answer (NET)	39%	46%a

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

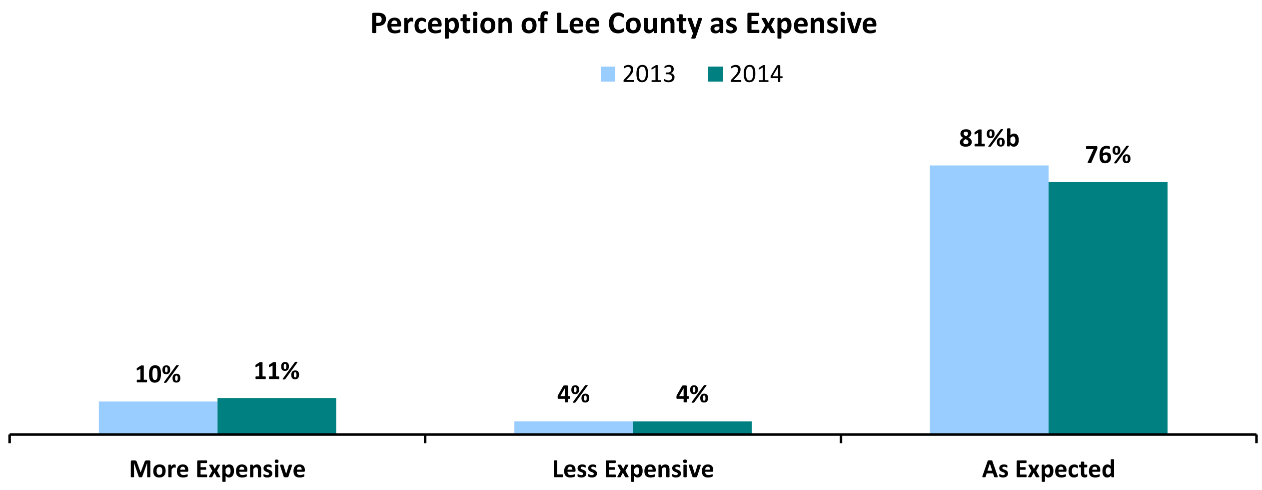


* Note: Response option added in January 2014.

Trip Activities

Perception of Lee County as Expensive		
Fall Season	2013	2014
	A	B
Total Respondents	**924**	**921**
More Expensive	10%	11%
Less Expensive	4%	4%
As Expected	81%b	76%
Don't know/No Answer (NET)	6%	9%a

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



Visitor and Travel Party Demographic Profile

Visitor Demographic Profile		
Fall Season	2013	2014
	A	B
Total Respondents	**924**	**921**
Age of respondent (mean)	52.9b	51.3
Annual household income (mean)	$105,846	$103,875
Martial Status		
Married	71%	72%
Single	12%	15%
Other	12%	11%
Vacations per year (mean)	3.1	3.4b
Short getaways per year (mean)	3.8	3.9

Q37: What is your age, please?
Q39: What is your total annual household income before taxes?
Q36. Are you: Married/Single/Other
Q33: How many vacations, lasting FIVE (5) OR MORE NIGHTS AWAY FROM HOME, do you take in an average year?
Q34: And how many short getaway trips lasting AT LEAST (1) BUT NOT MORE THAN FOUR (4) NIGHTS AWAY FROM HOME, do you take in an average year?

Travel Party		
Fall Season	2013	2014
	A	B
Total Respondents	**924**	**921**
Couple	48%b	42%
Family	29%	30%
Group of couples/friends	14%	15%
Single	7%	10%a
Mean travel party size	2.9	3.0
Mean adults in travel party	2.6	2.7

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

Travel Parties with Children		
Fall Season	2013	2013
	A	B
Total Respondents	**924**	**921**
Traveling with any Children (net)	18%	17%
Any younger than 6	9%b	6%
Any ages 6-11	7%	7%
Any 12-17 years old	8%	8%
No Children	82%	83%

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

Visitor Origin and Visitation Estimates

Total Visitation

Fall Season	% 2013	% 2014	Visitor Estimates 2013	Visitor Estimates 2014	% Change
Paid Accommodations	59%	63%	611,894	708,474	15.8%
Friends/Relatives	41%	37%	424,920	411,978	-3.0%
Total Visitation			**1,036,814**	**1,120,452**	**8.1%**

Visitor Origin (Paid Accommodation Guests)

Fall Season	%		Visitor Estimates		
Country of Origin	**2013**	**2014**	**2013**	**2014**	**% Change**
United States	71%	65%	433,581	462,815	6.7%
Germany	11%	12%	65,694	88,220	34.3%
UK	6%	9%	34,724	62,433	79.8%
Canada	5%	7%	32,847	50,218	52.9%
Scandinavia	2%	2%	11,262	14,930	32.6%
Switzerland	2%	1%	12,200	8,143	-33.3%
BeNeLux	1%	1%	5,631	6,786	20.5%
Latin America	<1%	1%	1,877	4,072	116.9%
France	1%	<1%	6,569	2,714	-58.7%
Ireland	<1%	<1%	1,877	1,357	-27.7%
Other International	<1%	1%	2,815	6,786	141.0%
No Answer	<1%	-	2,815	-	-

U.S. Region of Origin	2013	2014	2013	2014	% Change
Florida	6%	9%	27,216	42,976	57.9%
South (including Florida)	19%	26%	80,710	119,010	47.5%
Midwest	48%	45%	210,221	208,267	-0.9%
Northeast	25%	23%	109,803	107,439	-2.2%
West	3%	6%	14,077	28,100	99.6%
No Answer	4%	-	18,770	-	-

Fall 2014 Top DMAs (Paid Accommodations)

Chicago	7%	33,058
New York	7%	31,405
Boston	6%	26,447
Indianapolis	4%	19,835
Detroit	4%	18,182
Cleveland-Akron	3%	14,876
Columbus, OH	3%	13,223
Minneapolis-Saint Paul	3%	13,223
Philadelphia	3%	11,570
Orlando-Daytona Beach-Melbourne	2%	9,917

Note: The percentage of visitors by origin market is based on data collected from visitors in the Visitor Profile Survey. Respondents who did not answer the area of residence questions are excluded when calculating these percentages.

Occupancy Data Analysis
Fall 2014

For the 2014 fall season, property managers were interviewed in January 2015 to provide data for each specific month of the season (October, November, and December 2014).

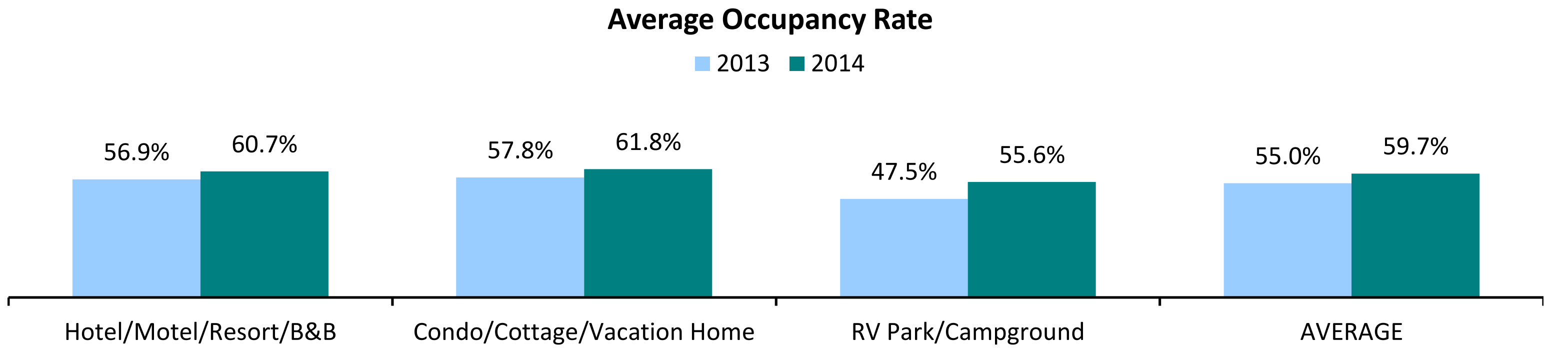
For the 2013 fall season, property managers were interviewed in January 2014 to provide data for each specific month of the season (October, November, and December 2013).

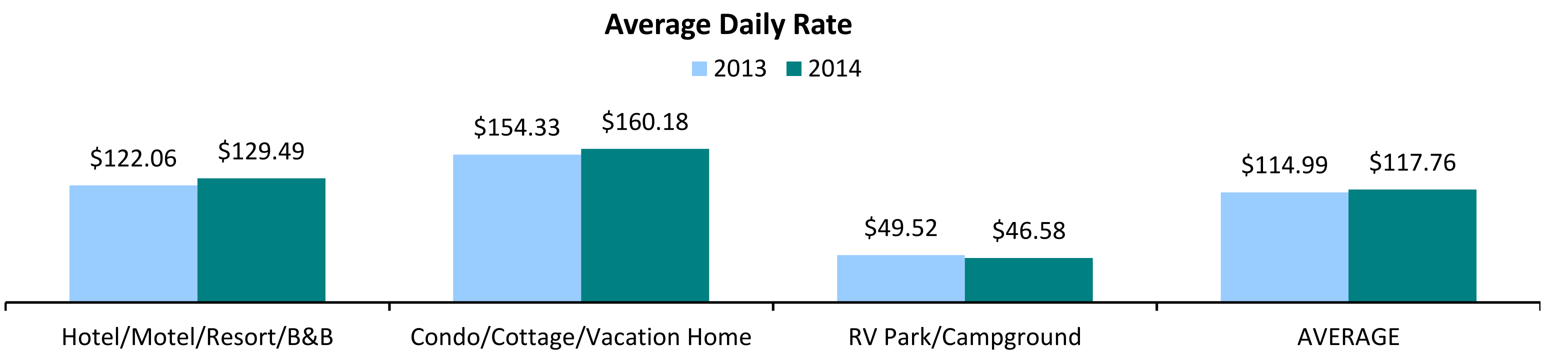
THE BEACHES OF FORT MYERS AND SANIBEL

Occupancy/Daily Rates

	Average Occupancy Rate			Average Daily Rate			RevPAR		
Fall Season	**2013**	**2014**	**% Change**	**2013**	**2014**	**% Change**	**2013**	**2014**	**% Change**
Hotel/Motel/Resort/B&B	56.9%	60.7%	6.5%	$122.06	$129.49	6.1%	$69.50	$78.55	13.0%
Condo/Cottage/Vacation Home	57.8%	61.8%	6.9%	$154.33	$160.18	3.8%	$89.26	$99.00	10.9%
RV Park/Campground	47.5%	55.6%	17.2%	$49.52	$46.58	-5.9%	$23.50	$25.91	10.3%
AVERAGE	**55.0%**	**59.7%**	**8.7%**	**$114.99**	**$117.76**	**2.4%**	**$63.19**	**$70.31**	**11.3%**

Q16: What was your overall average occupancy rate for the month of [October/November/December]?
Q17: What was your average daily rate (ADR) in [October/November/December]?





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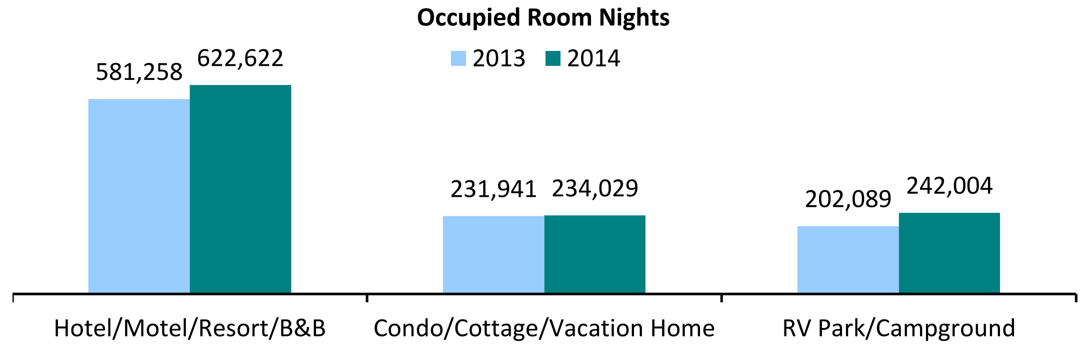
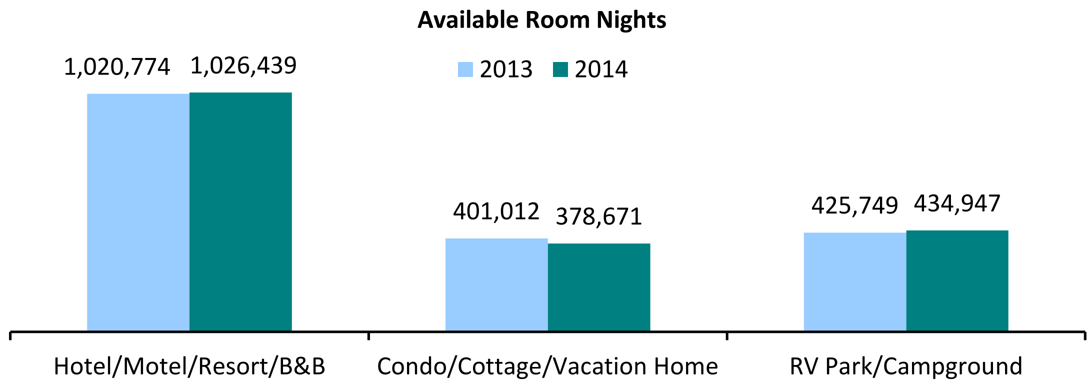
Room/Unit/Site Nights

	Occupied Room Nights			Available Room Nights		
Fall Season	**2013**	**2014**	**% Change**	**2013**	**2014**	**% Change**
Hotel/Motel/Resort/B&B	581,258	622,622	7.1%	1,020,774	1,026,439	0.6%
Condo/Cottage/Vacation Home	231,941	234,029	0.9%	401,012	378,671	-5.6%
RV Park/Campground	202,089	242,004	19.8%	425,749	434,947	2.2%
Total	**1,015,288**	**1,098,655**	**8.2%**	**1,847,535**	**1,840,057**	**-0.4%**

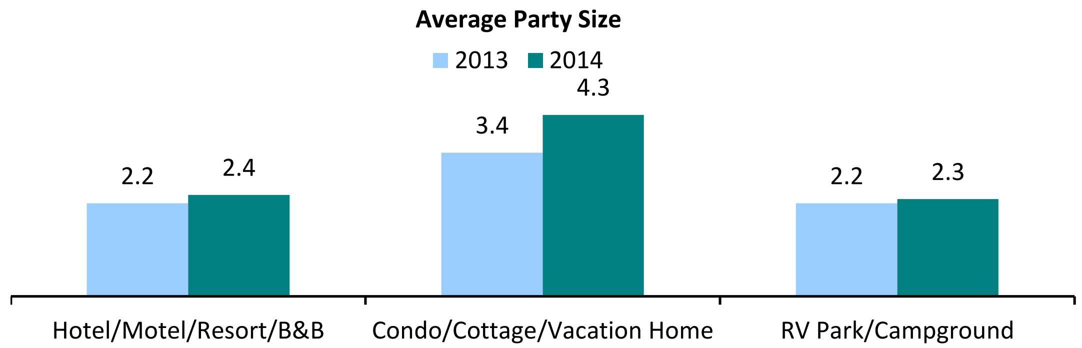


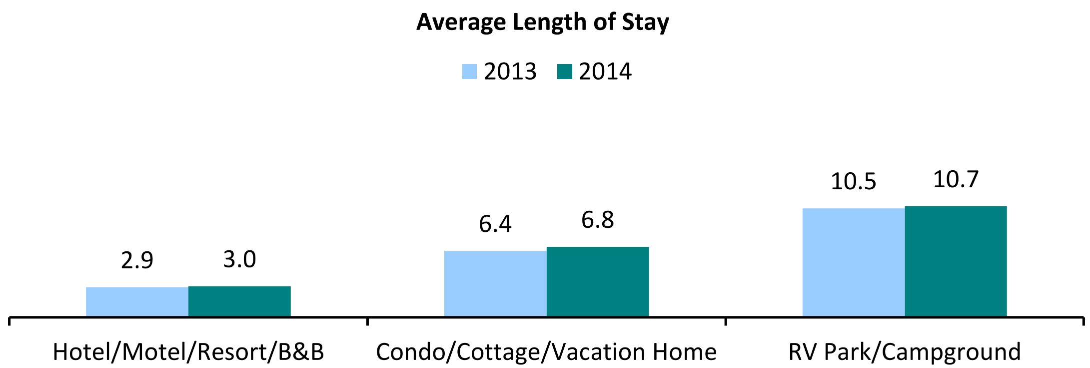


Average Party Size and Length of Stay

	Average Party Size			Average Length of Stay		
Fall Season	**2013**	**2014**	**% Change**	**2013**	**2014**	**% Change**
Hotel/Motel/Resort/B&B	2.2	2.4	11.3%	2.9	3.0	4.2%
Condo/Cottage/Vacation Home	3.4	4.3	25.3%	6.4	6.8	5.9%
RV Park/Campground	2.2	2.3	0.9%	10.5	10.7	1.6%
Average	**2.5**	**2.8**	**12.6%**	**4.1**	**4.3**	**5.2%**

Q18: What was your average number of guests per room/site/unit in [October/November/December]?
Q19: What was the average length of stay (in nights) of your guests in [October/November/December]?

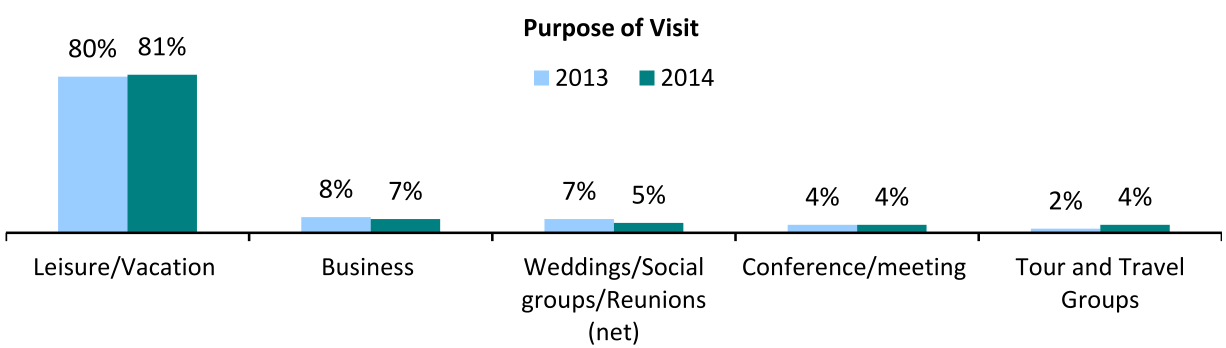




Lodging Management Estimates

Guest Profile		
Fall Season	2013	2014
	A	B
Total Number of Responses	**105**	**90**
Purpose of Visit		
Leisure/Vacation	80%	81%
Business	8%	7%
Weddings/Social groups/Reunions (net)	7%	5%
Conference/meeting	4%	4%
Tour and Travel Groups	2%	4%

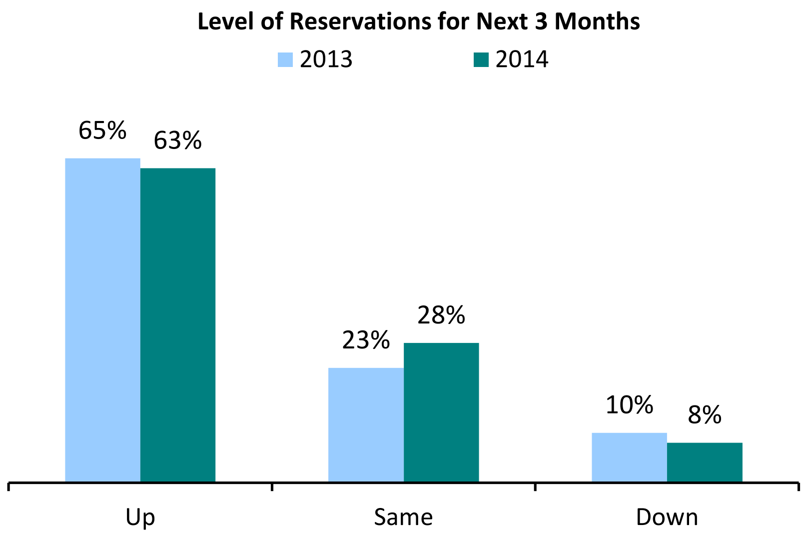
Q22: What percent of your [October/November/December] room/site/unit occupancy do you estimate was generated by:



Occupancy Barometer

Level of Reservations for Next 3 Months Compared to Last Year		
Fall Season	**2013**	**2014**
	A	**B**
Total Respondents	**118**	**98**
Up/Same (net)	88%	91%
Up	65%	63%
Same	23%	28%
Down	10%	8%

Q24: Compared to January, February, and March of 2014, is your property's total level of reservations up, the same or down for January, February, and March of 2015?



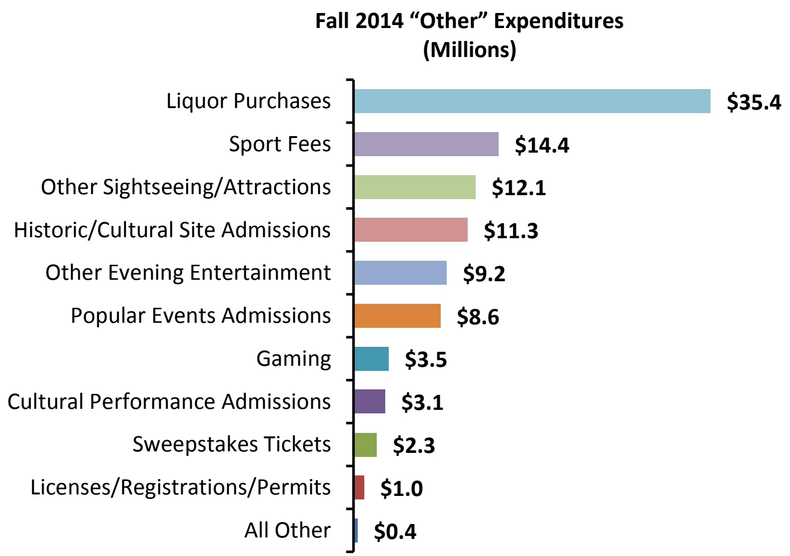
Economic Impact Analysis

Fall 2014

Total Visitor Expenditures by Spending Category

TOTAL EXPENDITURES			
Fall Season	2013	2014	% Change
TOTAL	$581,702,115	$627,065,380	7.8%
Food and Beverages	$151,262,331	$161,388,643	6.7%
Shopping	$163,039,120	$176,358,537	8.2%
Lodging Accommodations	$116,750,779	$129,382,657	10.8%
Ground Transportation	$53,422,538	$58,539,386	9.6%
Other	$97,227,347	$101,396,157	4.3%

(Note: Other includes the categories detailed below.)



(Note: The sum of the numbers in the chart may not match the "other" row in the table above due to rounding.)

Total Visitor Expenditures by Lodging Type

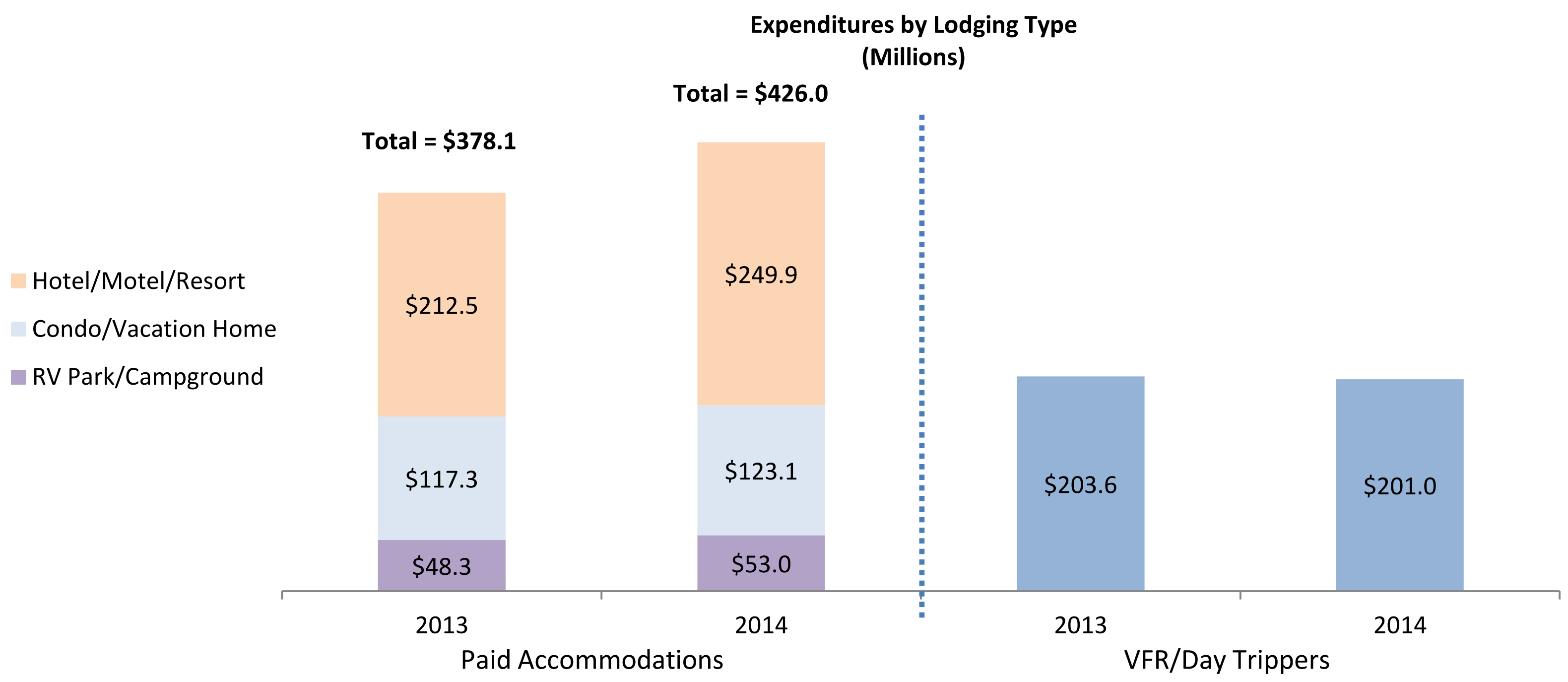
TOTAL EXPENDITURES						
	Staying Paid Accommodations			Visiting Friends and Relatives/Day Trippers		
Fall Season	**2013**	**2014**	**% Change**	**2013**	**2014**	**% Change**
TOTAL	$378,085,986	$426,028,481	12.7%	$203,616,129	$201,036,899	-1.3%
Lodging Accommodations	$116,750,779	$129,382,657	10.8%	$0	$0	-
Food and Beverages	$85,426,793	$95,968,715	12.3%	$65,835,538	$65,419,928	-0.6%
Shopping	$92,403,447	$104,575,400	13.2%	$70,635,673	$71,783,137	1.6%
Ground Transportation	$32,465,798	$37,222,439	14.7%	$20,956,740	$21,316,947	1.7%
Other	$51,039,169	$58,879,270	15.4%	$46,188,178	$42,516,887	-7.9%

"Other " includes the following categories:

- Liquor Purchases
- Other Sightseeing/Attractions
- Historic/Cultural Site Admissions
- Popular Events Admissions
- Sports Fees
- Other Evening Entertainment
- Gaming
- Cultural Performance Admissions
- Licenses/Registrations/Permits
- Sweepstakes Tickets
- All Other

Total Visitor Expenditures by Lodging Type

Total Expenditures by Lodging Type					
Fall Season	**2013**	**2014**	**% Change**	**2013**	**2014**
TOTAL	$581,702,115	$627,065,380	7.8%	100%	100%
Visiting Friends & Relatives/Day Trippers	$203,616,129	$201,036,899	-1.3%	35%	32%
Paid Accommodations	$378,085,986	$426,028,481	12.7%	65%	68%
Hotel/Motel/Resort/B&B	*$212,483,216*	$249,921,008	17.6%	37%	40%
Condo/Cottage/Vacation Home	*$117,259,873*	$123,090,429	5.0%	20%	20%
RV Park/Campground	*$48,342,897*	$53,017,044	9.7%	8%	8%



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Direct and Indirect Impact of Visitor Expenditures

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

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

DIRECT IMPACTS

Economic benefits due directly to visitor expenditures.

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

TOTAL IMPACTS

Total impacts are the sum of direct and indirect impacts.

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

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

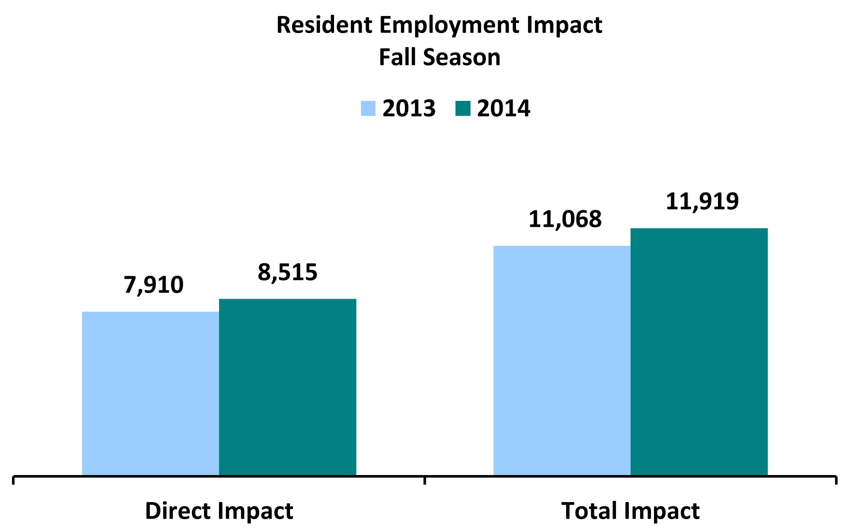
Impact on Jobs for Lee County Residents

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

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

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

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



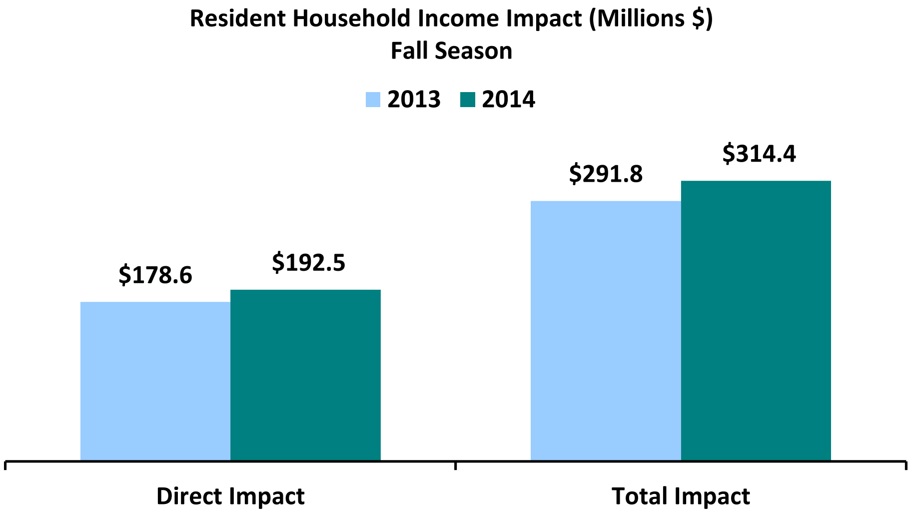
Impact on Household Income for Lee County Residents

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

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

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

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



Impact on State and Local Government Revenues

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

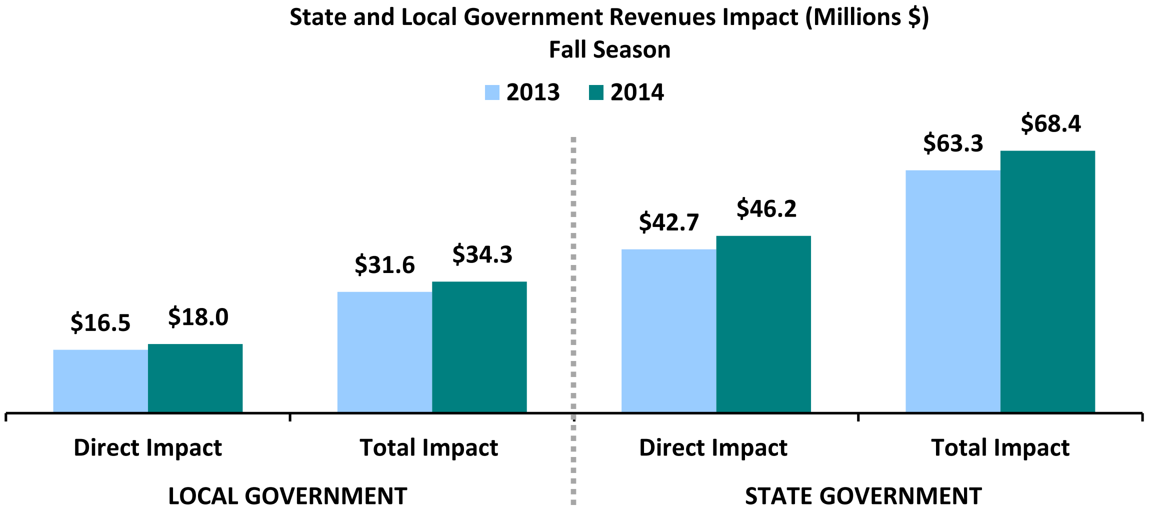
The gross government revenues accruing to governments as a result of producing the output purchased with visitor expenditures is the government revenue impact.

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

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

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

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



Appendix

Fall 2014

October 2014 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
RSW	RSW Airport	10/4/14	32
Sanibel	Holiday Inn	10/6/14	10
Sanibel	Casa Ybel	10/6/14	10
Sanibel	Lighthouse Beach	10/6/14	17
Fort Myers Beach	Estero Island Beach Club	10/8/14	10
Fort Myers Beach	Neptune Inn	10/8/14	10
Fort Myers Beach	Diamond Head Resort	10/8/14	9
Bonita Springs	Bonita Beach	10/11/14	27
Cape Coral	Cape Coral Yacht Club	10/12/14	8
Fort Myers	Edison Estates	10/17/14	25
Fort Myers	Summerlin Square Trolly	10/18/14	8
North Fort Myers	Shell Factory	10/18/14	5
Fort Myers Beach	Times Square	10/21/14	22
Fort Myers Beach	Best Western	10/21/14	6
Fort Myers Beach	Winward Passage	10/21/14	10
RSW	RSW Airport	10/25/14	31
Fort Myers	Edison Estates	10/28/14	25
Sanibel	Sanibel Inn	10/30/14	12
Sanibel	Loggerhead Cay	10/30/14	10
Sanibel	Tarpon Pointe	10/30/14	10
Estero	Miromar Outlets	10/31/14	15
Total			**312**

November 2014 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
RSW	RSW Airport	11/1/14	31
Estero	Miromar Outlets	11/3/14	10
Fort Myers Beach	Diamond Head Resort	11/6/14	10
Fort Myers Beach	Estero Island Beach Club	11/6/14	9
Fort Myers Beach	Best Western	11/6/14	12
Bonita Springs	Bonita Beach	11/11/14	25
Sanibel	Casa Ybel	11/13/14	8
Sanibel	Tarpon Pointe	11/13/14	6
Fort Myers	Edison Estates	11/18/14	22
RSW	RSW Airport	11/22/14	29
Sanibel	Holiday Inn	11/26/14	5
Sanibel	Loggerhead Cay	11/26/14	10
Sanibel	Sanibel Surfside	11/26/14	10
Fort Myers Beach	Times Square	11/28/14	20
Cape Coral	Cape Coral Yacht	11/28/14	10
Fort Myers	Edison Estates	11/29/14	28
Fort Myers	Centennial Park	11/29/14	10
Fort Myers Beach	The Pier	11/30/14	17
Sanibel	Lighthouse Beach	11/30/14	26
Total			**298**

December 2014 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
RSW	RSW Airport	12/1/14	32
Fort Myers	Edison Estates	12/3/14	33
Sanibel	Lighthouse Beach	12/4/14	9
Sanibel	Casa Ybel	12/4/14	15
Sanibel	Holiday Inn	12/4/14	15
Bonita Springs	Bonita Beach	12/8/14	20
Fort Myers Beach	Neptune Inn	12/16/14	10
Fort Myers Beach	Diamond Head Resort	12/16/14	10
Fort Myers Beach	Estero Island Beach Club	12/16/14	12
Estero	Miromar Outlets	12/26/14	28
Fort Myers Beach	Best Western	12/27/14	12
Fort Myers Beach	Times Square	12/27/14	24
Fort Myers	Centennial Park	12/28/14	12
RSW	RSW Airport	12/29/14	32
Sanibel	Loggerhead Cay	12/30/14	5
Sanibel	Sanibel Inn	12/30/14	10
Sanibel	Sanibel Surfside	12/30/14	10
Fort Myers	Edison Estates	12/31/14	22
Total			**311**

Occupancy Interviewing Statistics

Interviews were conducted during the first two weeks of January 2015 to gather data for October, November, and December 2014 lodging activity. Information was provided by 108 Lee County lodging properties.

Lodging Type	Fall 2014 Number of Interviews
Hotel/Motel/Resort/B&Bs	69
Condo/Cottage/Vacation Home/Timeshare	25
RV Park/Campground	14
Total	**108**

Note: Responses to survey questions are not forced, therefore, the number of respondents answering each individual question varies.