



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

Summer 2013 Visitor Profile and Occupancy Analysis

November 16, 2013

Prepared for:

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

Prepared by:

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Executive Summary

Summer 2013

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

For example:

| 2012 A | 2013 B |
|-----------|-----------|
| 60% | 70%a |

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

Executive Summary

Visitation Estimates

- During the summer season of 2013, Lee County hosted approximately 624,000 visitors staying in paid accommodations and 428,000 staying with friends or relatives while visiting, for an estimated total of over one million visitors.
- Summer 2013 visitation among paid accommodations guests was up 14.1% from 2012, but visitation among those staying with friends or relatives was down 4.5% year-over-year. Still, Lee County saw a 5.7% increase in total visitation over summer 2012.

| Estimated Visitation | 2012 | 2013 | % Change |
|-------------------------|----------------|------------------|-------------|
| Paid Accommodations | 546,952 | 624,158 | 14.1% |
| Friends/Relatives | 448,640 | 428,409 | -4.5% |
| Total Visitation | 995,592 | 1,052,567 | 5.7% |

Visitor Expenditures

- Summer 2013 visitors spent an estimated \$469.9 million during their stay in Lee County, which was somewhat higher than estimated spending among summer 2012 visitors (\$457.5 million).
- Expenditures among summer 2013 paid accommodations guests amounted to \$298.6 million (63% of the total). Visitors staying with friends or relatives contributed the remaining \$171.3 million. Spending among summer season paid accommodations guests increased 7.7% year-over-year, while Lee County saw a modest decline among the VFR traveler segment (-4.9%).

| Estimated Expenditures | 2012 | 2013 | % Change |
|---------------------------|----------------------|----------------------|-------------|
| Paid Accommodations | \$277,271,867 | \$298,563,087 | 7.7% |
| Friends/Relatives | \$180,224,300 | \$171,303,936 | -4.9% |
| Total Expenditures | \$457,496,167 | \$469,867,023 | 2.7% |

Visitor Origin

- Three-quarters of summer 2013 visitors staying in paid accommodations were U.S. residents (74%) – about the same incidence as last year (75%). The majority of international visitors staying in paid accommodations came from Germany, followed by the UK and Canada.
- Nearly half of domestic paid accommodations guests came from the South (45%), and one third from the Midwest (33%). Guests from the Northeast and West were far fewer in numbers.
- Same as last year, Miami was the top domestic feeder market for the Lee County lodging industry during summer 2013, followed closely by New York and Tampa to round out the top three.

Summer 2013 Top DMAs (Paid Accommodations)

| | | |
|-----------------------------------|----|--------|
| Miami-Fort Lauderdale | 6% | 29,054 |
| New York | 6% | 28,052 |
| Tampa-Saint Petersburg (Sarasota) | 5% | 24,045 |
| Saint Louis | 5% | 21,039 |
| Indianapolis | 4% | 19,035 |
| Chicago | 4% | 17,032 |
| Philadelphia | 3% | 15,028 |
| Atlanta | 3% | 15,028 |
| Cincinnati | 3% | 14,026 |
| West Palm Beach-Fort Pierce | 3% | 14,026 |
| Orlando-Daytona Beach-Melbourne | 3% | 14,026 |

Visitors Staying in Paid Accommodations

| Country of Origin | % | | Visitor Estimates | | % Change |
|---------------------|------|------|-------------------|---------|----------|
| | 2012 | 2013 | 2012 | 2013 | |
| United States | 75% | 74% | 410,214 | 463,861 | 13.1% |
| Germany | 9% | 9% | 47,614 | 54,100 | 13.6% |
| UK | 4% | 4% | 24,418 | 28,052 | 14.9% |
| Canada | 3% | 3% | 13,430 | 19,035 | 41.7% |
| Scandinavia | 2% | 2% | 12,209 | 14,026 | 14.9% |
| France | 2% | 2% | 8,546 | 11,020 | 29.0% |
| BeNeLux | 1% | 1% | 6,104 | 8,015 | 31.3% |
| Switzerland | 1% | 1% | 3,663 | 7,013 | 91.5% |
| Austria | - | 1% | - | 6,011 | - |
| Ireland | <1% | 1% | 2,442 | 5,009 | 105.2% |
| Latin America | 1% | <1% | 3,663 | 1,002 | -72.6% |
| Other International | 2% | 1% | 12,209 | 5,009 | -58.9% |
| No Answer | <1% | <1% | 2,442 | 2,004 | -17.9% |

Visitors Staying in Paid Accommodations

| U.S. Region of Origin | % | | Visitor Estimates | | % Change |
|---------------------------|------|------|-------------------|---------|----------|
| | 2012 | 2013 | 2012 | 2013 | |
| Florida | 22% | 22% | 89,124 | 103,191 | 15.8% |
| South (including Florida) | 39% | 45% | 158,714 | 207,385 | 30.7% |
| Midwest | 37% | 33% | 151,389 | 155,288 | 2.6% |
| Northeast | 18% | 17% | 75,694 | 77,143 | 1.9% |
| West | 2% | 2% | 9,767 | 9,017 | -7.7% |
| No Answer | 4% | 3% | 14,651 | 15,028 | 2.6% |

Note: The percentage of visitors by origin market is based on data collected from visitors in the Visitor Profile Survey.

Trip Planning

- The trip planning window reported by summer 2013 visitors was similar in length to that of summer 2012 visitors . For many visitors, their trip was planned well in advance. Seven in ten started talking about their Lee County trip three or more months in advance and nearly as many chose the destination within that timeframe. However, only half made their lodging reservations that far out.
 - 73% started talking about trip 3+ months in advance (vs. 69% in 2012)
 - 67% chose Lee County for trip 3+ months in advance (vs. 62% in 2012)
 - 49% made lodging reservations 3+ months in advance (vs. 45% in 2012)
- The internet continues to be a prominent trip planning resource among summer visitors to Lee County – the majority claimed to have visited one or more websites (85%) while planning this trip. Visitors most often mentioned using airline websites and search engine websites (36% and 32% respectively).
- Six in ten summer 2013 visitors indicated they typically use their laptop computer to access destination planning information online (61%). Half noted they use their smartphone (49%), which was higher than reported by summer 2012 visitors (41%). The incidence of tablet usage was also higher this year than last, with fully one-third of summer 2013 visitors mentioning they access destination planning information in this way (33% vs. 22% summer 2012).
- Lee County’s promise of tranquility, beaches, and warm weather were the most frequently cited attributes that positively influenced summer visitors’ selection of the destination: *peaceful/relaxing* (87%), *warm weather* (83%), and *white sandy beaches* (81%), .

Visitor Profile

- Two-thirds of summer 2013 visitors flew to the area (65%), and 80% of them landed at Southwest Florida International Airport – a similar pattern as observed last year.
- On average summer 2013 visitors said they were staying in Lee County for about 9 days versus an average of 8 days last year. The vast majority reporting they came to Lee County for a vacation trip (90%). Nearly three-quarters were repeat visitors (72%), averaging about one trip to Lee County per year in the past five years.
- Four in ten summer 2013 visitors interviewed said they were staying in hotel/motel/resort properties during their trip. Slightly more indicated they were staying in condo/vacation home properties (46%) – mostly paid rentals. Half of paid accommodation guests reported that the quality of their lodgings *far exceeded* or *exceeded expectations* (48%) and slightly fewer than half said the quality *met expectations* (44%).

Visitor Profile (cont'd)

- The top activities visitors enjoyed in Lee County during summer 2013 were: *beaches* (94%), *relaxing* (77%), *swimming* (72%), and *dining out* (71%). Somewhat fewer took advantage of the *shopping* experiences available in Lee County (59%). Further, when asked which attractions they were visiting on their Lee County trip, *beaches* received the highest level of mentions at 86%. A sizeable minority of visitors took day trips outside of Lee County (45%) – most of them going to Naples (28%).
- The majority of summer 2013 visitors were either *very satisfied* or *satisfied* with their visit (94% combined), satisfaction levels the same as last year. There is still a strong desire to return to the destination. When queried 88% said they are likely to return to Lee County, and more than half of them said they will return next year (56%). Similarly, a high proportion indicated they would recommend Lee County to a friend over other areas in Florida (88%).
- Excessive rainfall this summer may have had a negative impact on visitors' satisfaction. When asked what they liked *least* about the destination, 22% said weather, representing a significant increase versus last year when only 7% said the same. Anecdotally, some visitors offered write-in comments on the survey that suggested water quality issues also caused concern.
- The demographic composition of summer 2013 visitors can be summarized as follows:
 - 48 years of age on average
 - \$104,300 household income on average
 - 69% married
 - 47% traveling as a family
 - 32% traveling as a couple
 - 37% traveling *with* children
 - 3 to 4 people in travel party on average

Lodging Industry Assessments

- For the Lee County lodging industry in total, *available* room nights showed no change from summer 2012 to 2013 but *occupied* room nights increased 4.5%. The hotel/motel/resort and condo/vacation home categories saw slight to moderate decreases in available room nights while RV parks/campgrounds saw an increase. However, all property categories experienced growth in *occupied* room nights.

| Summer Season | Occupied Room Nights | | | Available Room Nights | | |
|-----------------------------|----------------------|----------------|-------------|-----------------------|------------------|-------------|
| | 2012 | 2013 | % Change | 2012 | 2013 | % Change |
| Hotel/Motel/Resort/B&B | 522,417 | 532,562 | 1.9% | 1,013,580 | 1,007,222 | -0.6% |
| Condo/Cottage/Vacation Home | 185,768 | 198,205 | 6.7% | 438,269 | 426,320 | -2.7% |
| RV Park/Campground | 115,913 | 130,720 | 12.8% | 444,463 | 468,242 | 5.4% |
| Total | 824,098 | 861,487 | 4.5% | 1,896,312 | 1,901,784 | 0.3% |

- Consequently, the industry-wide average occupancy rate in Lee County increased from 43.5% in summer 2012 to 45.3% in summer 2013 (+4.1%). Again, all three lodging categories saw a boost in average occupancy rate for the summer season 2013 when compared with last year.
- Lee County's average daily rate increased 4.7% year-over-year. The hotel/motel/resort and condo/vacation home categories posted an increase in ADR versus last summer, but RV parks/campgrounds felt a loss.
- The increases in both average occupancy rate and ADR produced a positive shift in RevPAR from summer 2012 to summer 2013 (+9.2%). Hotels/motels/resorts and condos/vacation homes fared quite well in RevPAR performance. However, for RV parks/campgrounds, the decline in ADR counteracted the increase in average occupancy, resulting in RevPAR that was the same as last year.

| Summer Season | Average Occupancy Rate | | | Average Daily Rate | | | RevPAR | | |
|-----------------------------|------------------------|--------------|-------------|--------------------|-----------------|-------------|----------------|----------------|-------------|
| | 2012 | 2013 | % Change | 2012 | 2013 | % Change | 2012 | 2013 | % Change |
| Hotel/Motel/Resort/B&B | 51.5% | 52.9% | 2.7% | \$110.31 | \$115.41 | 4.6% | \$56.86 | \$61.02 | 7.3% |
| Condo/Cottage/Vacation Home | 42.4% | 46.5% | 9.7% | \$133.28 | \$145.85 | 9.4% | \$56.49 | \$67.81 | 20.0% |
| RV Park/Campground | 26.1% | 27.9% | 6.9% | \$40.13 | \$37.69 | -6.1% | \$10.47 | \$10.52 | 0.5% |
| AVERAGE | 43.5% | 45.3% | 4.1% | \$105.62 | \$110.62 | 4.7% | \$45.90 | \$50.11 | 9.2% |

Lodging Industry Assessments (cont'd)

- Lee County property managers are quite optimistic about their reservations for the coming three months. More than half of managers responding reported that their total level of reservations for October, November, and December are up over the same period the prior year (55%), and another third said reservations for fourth quarter 2013 are at least the same as the same time last year (35%). Very few claimed that their reservations are down (9%). In contrast, property managers responded far less favorably in 2012, with only one third reporting their reservations for October through December 2012 were up over the prior year (32%) and fewer than half saying the same (46%).
- The summertime releases from Lake Okeechobee, resulting in brackish Gulf, Bay, and river waters, had somewhat of a negative impact on the Lee County lodging industry. According to property managers surveyed, about one-third had guests with rooms reserved for July, August, or September 2013 who either cancelled or shortened their stay specifically because of concerns about water quality issues. More than half of those that did said their room revenue lost in the past three months amounted to \$5,000 or less and 25% said their loss was between \$5,000 and \$10,000.

Summer 2013 Lee County Snapshot

| Total Visitation | | | | |
|-------------------------|------|------|-------------------|-----------|
| | % | | Visitor Estimates | |
| Summer Season | 2012 | 2013 | 2012 | 2013 |
| Paid Accommodations | 55% | 59% | 546,952 | 624,158 |
| Friends/Relatives | 45% | 41% | 448,640 | 428,409 |
| <i>Total Visitation</i> | | | 995,592 | 1,052,567 |

| Total Visitor Expenditures | | | |
|----------------------------|---------------|---------------|----------|
| Summer Season | 2012 | 2013 | % Change |
| Total Visitor Expenditures | \$457,496,167 | \$469,867,023 | 2.7% |
| Paid Accommodations | \$277,271,867 | \$298,563,087 | 7.7% |

| Visitor Origin - Visitors Staying in Paid Accommodations | | | | |
|--|------|------|-------------------|---------|
| | % | | Visitor Estimates | |
| Summer Season | 2012 | 2013 | 2012 | 2013 |
| Florida | 22% | 22% | 89,124 | 103,191 |
| United States | 75% | 74% | 410,214 | 463,861 |
| Germany | 9% | 9% | 47,614 | 54,100 |
| UK | 5% | 4% | 24,418 | 28,052 |
| Canada | 3% | 3% | 13,430 | 19,035 |
| Other International | 9% | 9% | 48,835 | 57,106 |
| No Answer | <1% | <1% | 2,442 | 2,004 |

| First-Time/Repeat Visitors to Lee County | | |
|--|------|------|
| Summer Season | 2012 | 2013 |
| First-time | 32% | 27% |
| Repeat | 67% | 72% |

| | Average Occupancy Rate | | | Average Daily Rate | | | RevPAR | | |
|-----------------------------|------------------------|--------------|-------------|--------------------|-----------------|-------------|----------------|----------------|-------------|
| Summer Season | 2012 | 2013 | % Change | 2012 | 2013 | % Change | 2012 | 2013 | % Change |
| Hotel/Motel/Resort/B&B | 51.5% | 52.9% | 2.7% | \$110.31 | \$115.41 | 4.6% | \$56.86 | \$61.02 | 7.3% |
| Condo/Cottage/Vacation Home | 42.4% | 46.5% | 9.7% | \$133.28 | \$145.85 | 9.4% | \$56.49 | \$67.81 | 20.0% |
| RV Park/Campground | 26.1% | 27.9% | 6.9% | \$40.13 | \$37.69 | -6.1% | \$10.47 | \$10.52 | 0.5% |
| AVERAGE | 43.5% | 45.3% | 4.1% | \$105.62 | \$110.62 | 4.7% | \$45.90 | \$50.11 | 9.2% |

Calendar YTD 2013 Lee County Snapshot

| Total Calendar Year Visitation | | | | |
|--------------------------------|------|------|-------------------|------------------|
| | % | | Visitor Estimates | |
| | 2012 | 2013 | 2012 | 2013 |
| Paid Accommodations | 50% | 56% | 1,862,636 | 2,091,118 |
| Friends/Relatives | 50% | 44% | <u>1,839,482</u> | <u>1,670,001</u> |
| <i>Total Visitation</i> | | | <i>3,702,118</i> | <i>3,761,119</i> |

| Visitor Origin - Visitors Staying in Paid Accommodations | | | | |
|--|------|------|-------------------|-----------|
| | % | | Visitor Estimates | |
| | 2012 | 2013 | 2012 | 2013 |
| Florida | 11% | 10% | 167,123 | 169,897 |
| US | 80% | 79% | 1,496,965 | 1,644,471 |
| Germany | 6% | 7% | 114,272 | 141,046 |
| Canada | 3% | 5% | 62,850 | 105,785 |
| UK | 3% | 3% | 54,279 | 64,112 |
| Other International | 7% | 6% | 131,413 | 128,224 |
| No Answer | <1% | <1% | 2,857 | 7,480 |

| Total Visitor Expenditures | | | |
|----------------------------|----------------------------|-----------------|-----------------|
| | 2012 | 2013 | % Change |
| | Total Visitor Expenditures | \$2,166,114,218 | \$2,186,438,031 |
| Paid Accommodations | \$1,389,302,507 | \$1,440,207,473 | 3.7% |

| First-Time/Repeat Visitors to Lee County | | |
|--|------|------|
| | 2012 | 2013 |
| First-time | 26% | 24% |
| Repeat | 73% | 75% |

| | Average Occupancy Rate | | | Average Daily Rate | | | RevPAR | | |
|-----------------------------|------------------------|--------------|-------------|--------------------|-----------------|-------------|----------------|----------------|-------------|
| | 2012 | 2013 | % Change | 2012 | 2013 | % Change | 2012 | 2013 | % Change |
| Hotel/Motel/Resort/B&B | 61.9% | 66.0% | 6.6% | \$141.11 | \$144.61 | 2.5% | \$87.40 | \$95.48 | 9.2% |
| Condo/Cottage/Vacation Home | 59.9% | 65.2% | 8.8% | \$180.62 | \$178.11 | -1.4% | \$108.25 | \$116.11 | 7.3% |
| RV Park/Campground | 50.1% | 51.1% | 1.9% | \$50.17 | \$49.33 | -1.7% | \$25.14 | \$25.18 | 0.2% |
| AVERAGE | 58.7% | 62.2% | 6.0% | \$131.94 | \$133.67 | 1.3% | \$77.39 | \$83.15 | 7.4% |

Visitor Profile Analysis Summer 2013

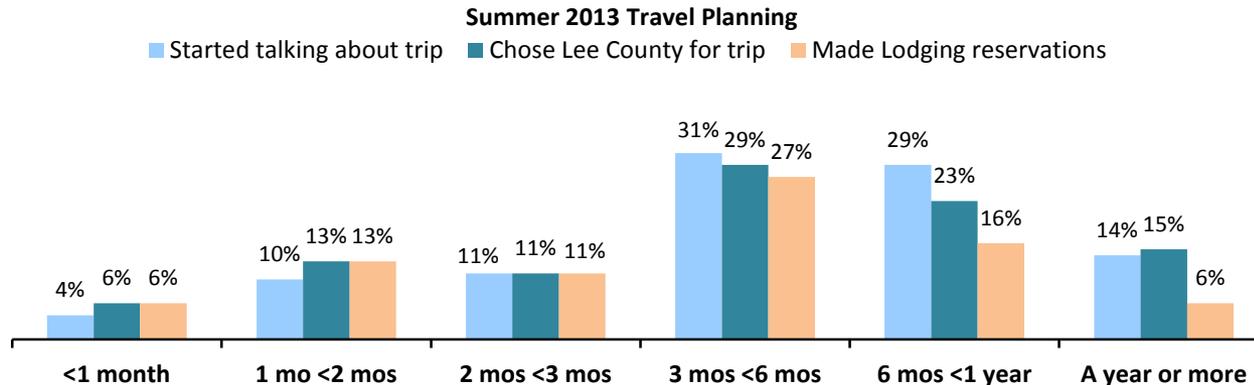
A total of 921 interviews were conducted with visitors in Lee County during the summer months of July, August, and September 2013. A total sample of this size is considered accurate to plus or minus 3.2 percentage points at the 95% confidence level.

A total of 617 interviews were conducted with visitors in Lee County during the summer months of July, August, and September 2012. A total sample of this size is considered accurate to plus or minus 4.0 percentage points at the 95% confidence level.

Travel Planning

| | Started Talking About Trip | | Chose Lee County for Trip | | Made Lodging Reservations | |
|---------------------------------|----------------------------|------------|---------------------------|-------------|---------------------------|-------------|
| | 2012 | 2013 | 2012 | 2013 | 2012 | 2013 |
| | A | B | A | B | A | B |
| Summer Season | | | | | | |
| Total Respondents | 617 | 921 | 617 | 921 | 617* | 921* |
| <u>Less than 3 months (NET)</u> | <u>29%</u> | <u>25%</u> | <u>34%</u> | <u>29%</u> | <u>37%b</u> | <u>30%</u> |
| <1 month | 4% | 4% | 6% | 6% | 8% | 6% |
| 1 month - <2 months | 12% | 10% | 16%b | 13% | 18%b | 13% |
| 2 months - <3 months | 13% | 11% | 11% | 11% | 11% | 11% |
| <u>3 months or more (NET)</u> | <u>69%</u> | <u>73%</u> | <u>62%</u> | <u>67%a</u> | <u>45%</u> | <u>49%</u> |
| 3 months - <6 months | 24% | 31%a | 26% | 29% | 23% | 27% |
| 6 months - <1 year | 33%b | 29% | 25% | 23% | 19% | 16% |
| A year or more | 11% | 14% | 11% | 15% | 4% | 6%a |
| No Lodging Reservations Made | N/A | N/A | N/A | N/A | 16% | 18% |
| No Answer | 2% | 2% | 5% | 3% | 3% | 3% |

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?



* Base: Among those staying in paid accommodations

Travel Planning

Devices Used to Access Destination Planning Information

| Summer Season | 2012 | 2013 |
|---------------------------------------|------------------|------------------|
| Total Respondents | 617 | 921 |
| <u>Any (NET)</u> | <u>96%</u> | <u>95%</u> |
| Laptop computer | 68% ^b | 61% |
| Smartphone (iPhone, Blackberry, etc.) | 41% | 49% ^a |
| Desktop computer | 52% ^b | 44% |
| Tablet (iPad, etc.) | 24% | 33% ^a |
| E-Reader (Nook, Kindle, etc.) | 5% | 5% |
| Other portable device | 1% | 1% |
| None of these | 3% | 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

| Summer Season | 2012 | 2013 |
|---|------------------|------------------|
| | A | B |
| Respondents who used a device to plan their trip | 593 | 874 |
| <u>Visited web sites (net)</u> | <u>85%</u> | <u>85%</u> |
| Airline websites | 37% | 36% |
| Search Engines | 34% | 32% |
| Booking websites | 29% | 26% |
| Trip Advisor | 20% | 23% |
| Hotel websites | 29% ^b | 23% |
| www.FortMyers-Sanibel.com | 18% | 15% |
| Visit Florida | 10% | 9% |
| Facebook | 6% | 5% |
| AAA | 6% | 5% |
| Other | 13% | 18% ^a |
| None/Didn't visit websites | 12% | 14% |
| No Answer | 3% | 1% |

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

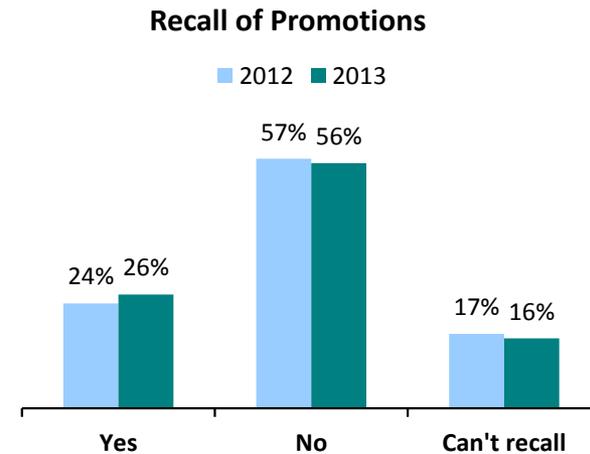
Travel Planning

| Travel Information Requested | | |
|---|------------|------------|
| Summer Season | 2012 | 2013 |
| | A | B |
| Total Respondents | 617 | 921 |
| <u>Requested information (NET)</u> | <u>33%</u> | <u>30%</u> |
| <i>Hotel Web Site</i> | 16% | 13% |
| <i>VCB website</i> | 7% | 8% |
| <i>Call hotel</i> | 7% | 6% |
| <i>Visitor Guide</i> | 4% | 3% |
| <i>Other</i> | 9% | 8% |
| <u>None/Did not request information</u> | <u>63%</u> | <u>66%</u> |
| 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 | | |
|---------------------------------|------------|------------|
| Summer Season | 2012 | 2013 |
| | A | B |
| Total Respondents | 617 | 921 |
| Yes | 24% | 26% |
| No | 57% | 56% |
| Can't Recall | 17% | 16% |

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



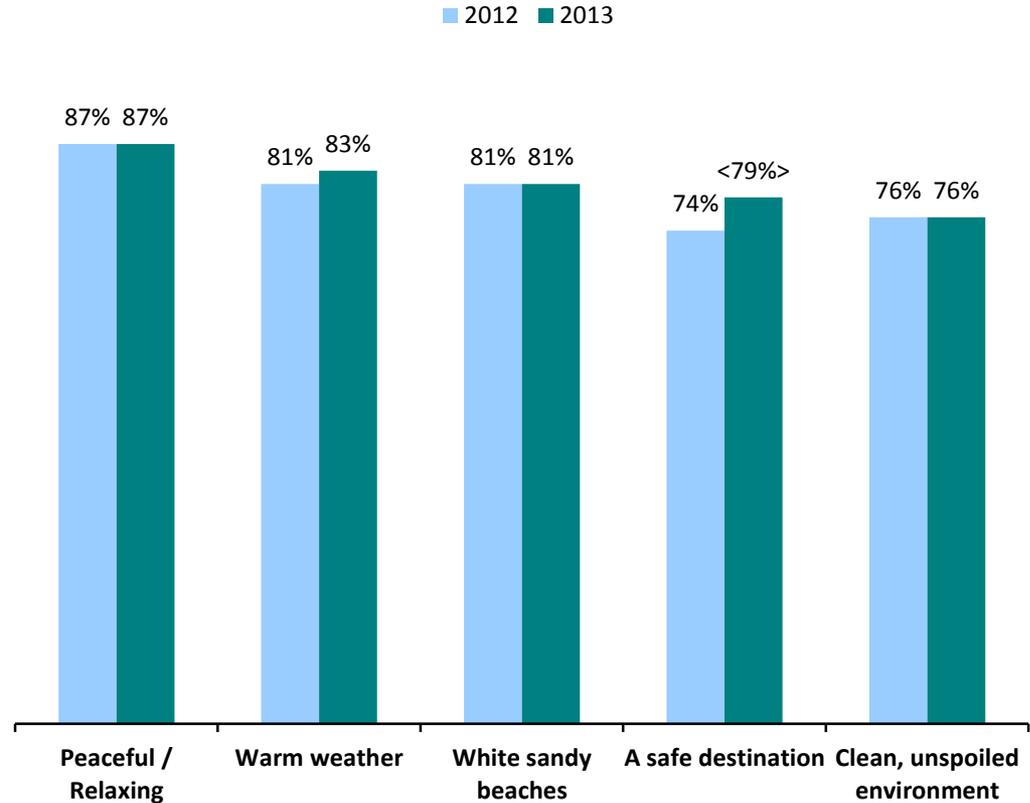
Travel Planning

| Travel Decision Influences* | | |
|------------------------------|------------|------------------|
| Summer Season | 2012 | 2013 |
| | A | B |
| Total Respondents | 617 | 921 |
| Peaceful / Relaxing | 87% | 87% |
| Warm weather | 81% | 83% |
| White sandy beaches | 81% | 81% |
| A safe destination | 74% | 79% ^a |
| Clean, unspoiled environment | 76% | 76% |
| Convenient location | 71% | 73% |
| Good value for the money | 71% | 71% |
| Reasonably priced lodging | 65% | 66% |
| A "family" atmosphere | 65% | 66% |
| Plenty to see and do | 61% | 61% |
| Affordable dining | 59% | 59% |
| Upscale accommodations | 58% | 58% |

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)

Top Travel Decisions Influences*



Trip Profile

| Mode of Transportation | | |
|--------------------------|------------|------------|
| Summer Season | 2012 | 2013 |
| | A | B |
| Total Respondents | 617 | 921 |
| Fly | 65% | 65% |
| Drive a personal vehicle | 28% | 29% |
| Drive a rental vehicle | 7% | 5% |
| Drive an RV | <1% | 0% |
| Other/No Answer (NET) | 1% | <1% |

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

| Airport Used | | |
|-------------------------------|-----------------|------------|
| Summer Season | 2012 | 2013 |
| | A | B |
| Respondent who flew | 399 | 601 |
| SW Florida Int'l (Fort Myers) | 77% | 80% |
| Tampa Int'l | 3% | 5% |
| Miami Int'l | 8% ^b | 5% |
| Orlando Int'l | 6% | 4% |
| Ft. Lauderdale Int'l | 2% | 3% |
| Sarasota / Bradenton | <1% | <1% |
| West Palm Beach Int'l | 0% | <1% |
| Other/No Answer (NET) | 4% | 3% |

Q2: At which Florida airport did you land?

| Frequency of Using SWFL Int'l (Past Year) | | |
|---|------------|------------|
| Summer Season | 2012 | 2013 |
| Total Respondents | 617 | 921 |
| <u>One or more trips</u> | <u>48%</u> | <u>51%</u> |
| 1 trip | 30% | 34% |
| 2 to 3 trips | 14% | 12% |
| 4 to 5 trips | 2% | 3% |
| 6 or more trips | 2% | 2% |
| <u>None/No Answer</u> | <u>52%</u> | <u>49%</u> |

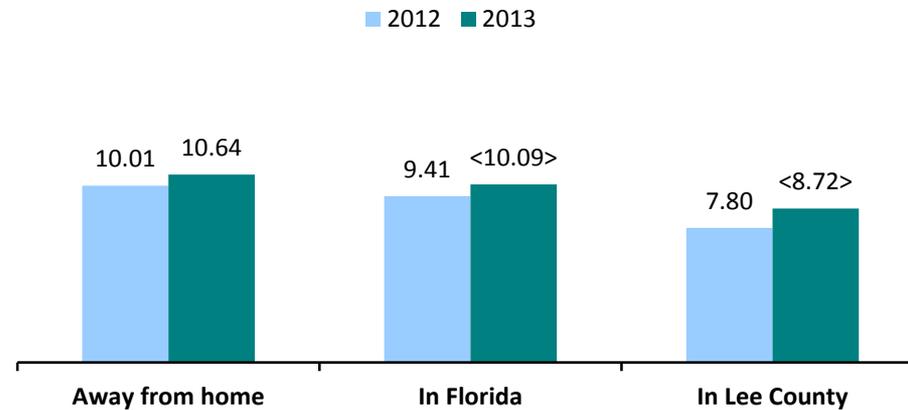
Q40. In the past year, how many trips have you taken where you used Southwest Florida International airport (Fort Myers) for your air travel? *Note: New question added in January 2012.*

Trip Profile

| Trip Length Mean # of Days | | |
|-------------------------------|------------|------------|
| Summer Season | 2012 | 2013 |
| | A | B |
| Total Respondents | 617 | 921 |
| Away from home | 10.01 | 10.64 |
| In Florida | 9.41 | 10.09a |
| In Lee County | 7.62 | 8.72a |

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

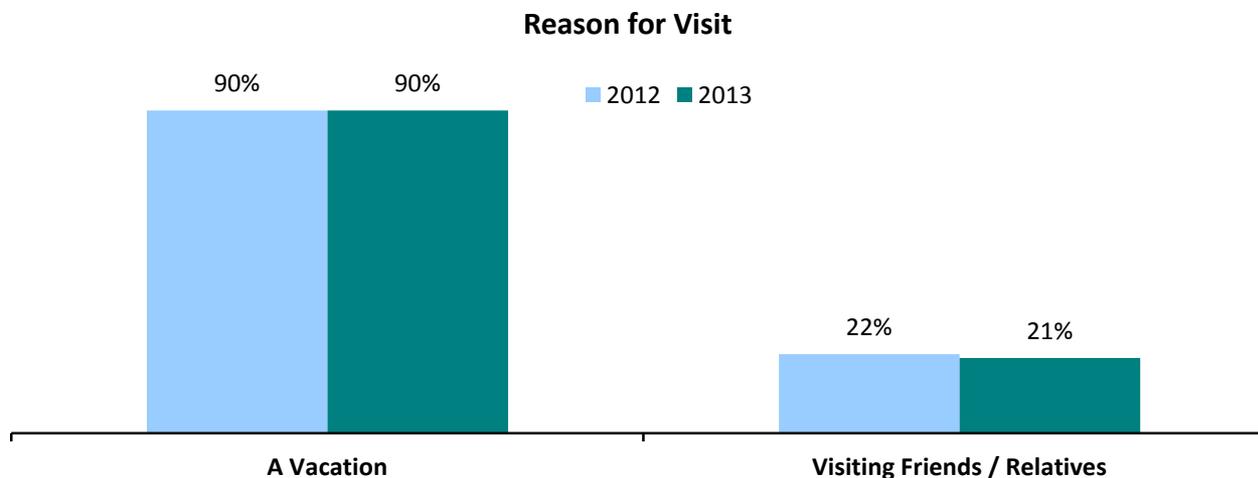
Trip Length (mean # of days)



Trip Profile

| Reason(s) for Visit | | |
|------------------------------|-----------------|------------|
| Summer Season | 2012 | 2013 |
| | A | B |
| Total Respondents | 617 | 921 |
| A Vacation | 90% | 90% |
| Visiting Friends / Relatives | 22% | 21% |
| Sporting Event(s) | 1% | 1% |
| Personal Business | 3% ^b | 1% |
| Other Business Trip | 2% | 1% |
| A Conference / Meeting | <1% | <1% |
| A Convention / Trade Show | <1% | <1% |
| Other/No Answer | 1% | 1% |

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



Trip Profile

| First Time Visitors to Lee County | | | | | | | | |
|-----------------------------------|------------------|------------------|-------------------|------------|------------------------|------------|------------------------|------------------|
| Summer Season | Total | | Florida Residents | | Out-of-State Residents | | International Visitors | |
| | 2012 | 2013 | 2012 | 2013 | 2012 | 2013 | 2012 | 2013 |
| | A | B | A | B | A | B | A | B |
| Total Respondents | 617 | 921 | 93 | 134 | 362 | 526 | 140 | 229 |
| First-time visitor | 32% ^b | 27% | 11% | 16% | 32% | 26% | 49% | 39% |
| Repeat visitor | 67% | 72% ^a | 88% | 84% | 68% | 73% | 50% | 61% ^a |
| No Answer | 1% | 1% | 1% | 0% | 1% | 1% | 1% | 0% |

Q15: Is this your first visit to Lee County?

**Note: Small sample size. (N<70) Please interpret results with caution.*

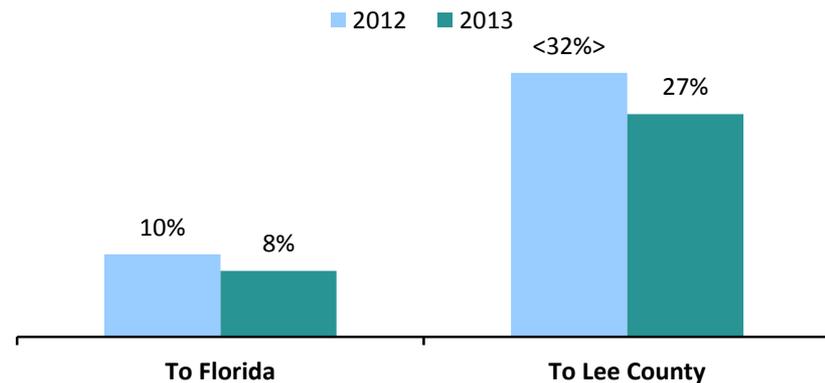
***N/A: Insufficient number of responses for statistical analysis (N<30).*

| First Time Visitors to Florida | | |
|--------------------------------|-----------------|------------|
| Summer Season | 2012 | 2013 |
| Total Respondents | 617 | 921 |
| | A | B |
| Yes, first-time visitor | 10% | 8% |
| No | 74% | 78% |
| No answer | 1% ^b | <1% |
| <i>FL Residents*</i> | 15% | 15% |

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



Trip Profile

| Previous Visits in Five Years | | | | |
|-------------------------------|-----------------------------|-------------------|--------------------------------|------|
| | Mean # of Visits to Florida | | Mean # of Visits to Lee County | |
| Summer Season | 2012 | 2013 | 2012 | 2013 |
| | A | B | A | B |
| Base: Repeat Visitors | 455(FL res. Excl) | 716(FL res. Excl) | 412 | 663 |
| Number of visits | 5.0 | 5.0 | 4.7 | 5.2 |

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?

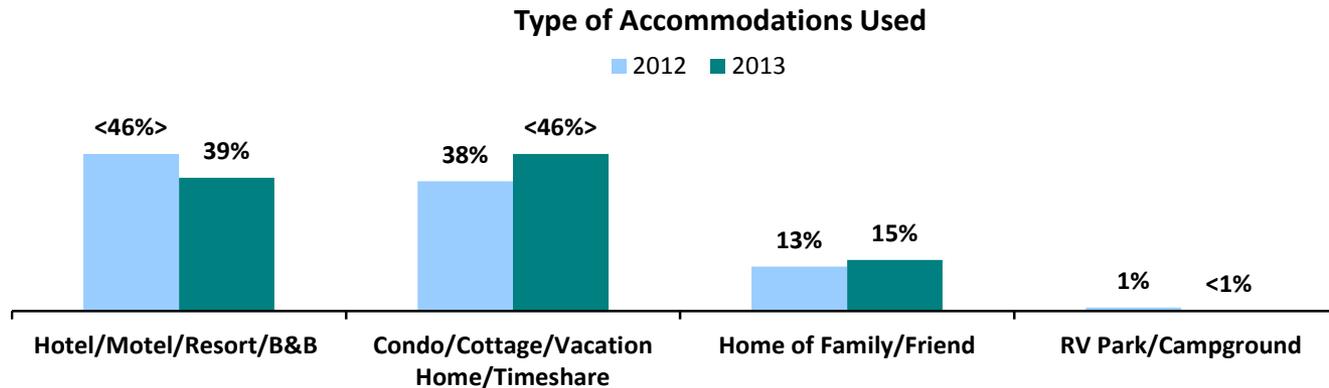
Previous Visits in Five Years



Trip Profile

| Type of Accommodations Used | | |
|---|-------------------------------|-------------------------------|
| Summer Season | 2012 | 2013 |
| | A | B |
| Total Respondents | 617 | 921 |
| <u>Hotel/Motel/Resort/B&B (NET)</u> | <u>46%^b</u> | <u>39%</u> |
| At a hotel/motel/historic inn | 23% ^b | 19% |
| At a resort | 23% | 20% |
| At a Bed and Breakfast | <1% | <1% |
| <u>Condo/Cottage/Vacation Home/Timeshare (NET)</u> | <u>38%</u> | <u>46%^a</u> |
| Rented home/condo | 26% | 29% |
| Owned home/condo | 9% | 12% ^a |
| Borrowed home/condo | 4% | 5% |
| At the home of family or a friend | 13% | 15% |
| RV Park/Campground (NET) | 1% | <1% |
| Daytripper (No Accommodations) | 1% | <1% |

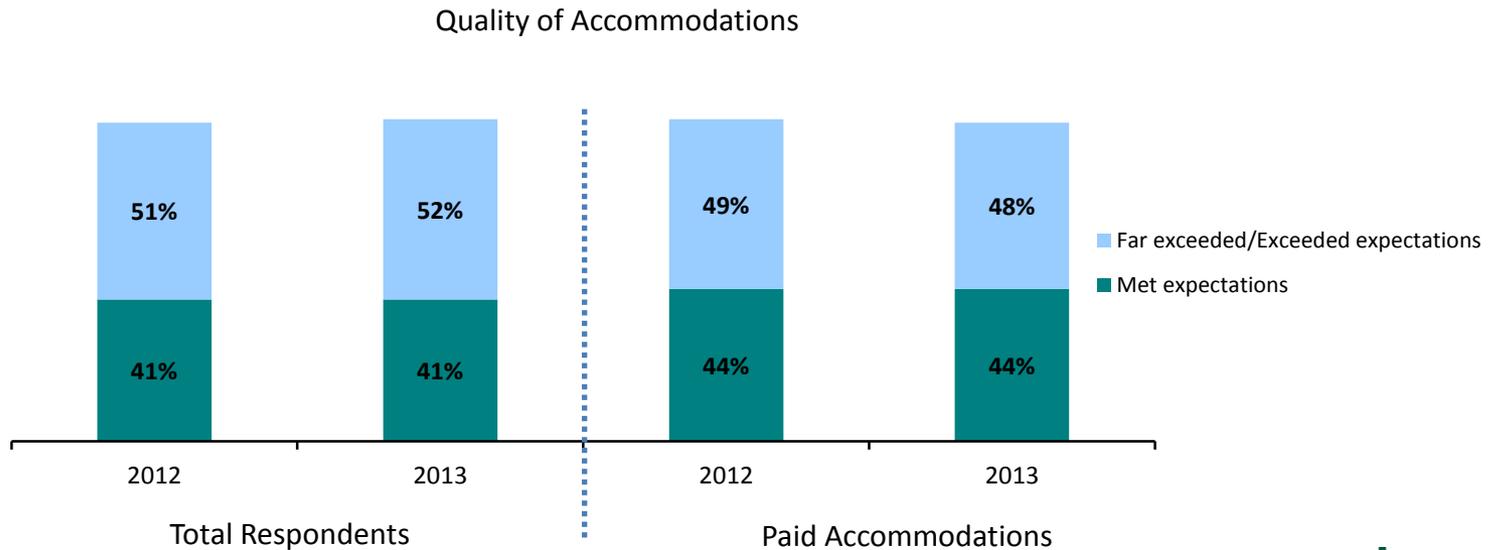
Q20: Are you staying overnight (either last night or tonight):



Trip Profile

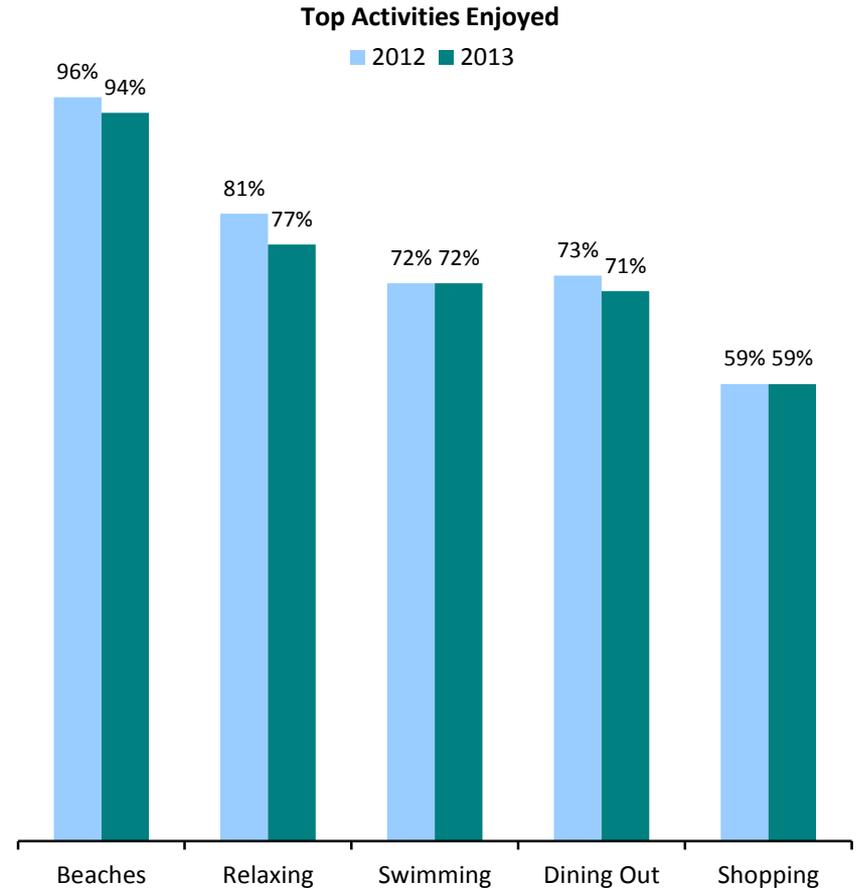
| Quality of Accommodations | | | | |
|-------------------------------------|-------------------|------------|---------------------|------------|
| | Total Respondents | | Paid Accommodations | |
| Summer Season | 2012 | 2013 | 2012 | 2013 |
| | A | B | A | B |
| Respondents | 617 | 921 | 448 | 622 |
| Far exceeded/Exceeded expectations | 51% | 52% | 49% | 48% |
| Met your expectations | 41% | 41% | 44% | 44% |
| Did not meet/Far below expectations | 3% | 3% | 4% | 3% |
| No Answer | 5% | 4% | 3% | 4% |

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



Trip Activities

| Activities Enjoyed | | |
|----------------------------|------------|------------|
| Summer Season | 2012 | 2013 |
| | A | B |
| Total Respondents | 617 | 921 |
| Beaches | 96% | 94% |
| Relaxing | 81% | 77% |
| Swimming | 72% | 72% |
| Dining Out | 73% | 71% |
| Shopping | 59% | 59% |
| Shelling | 42% | 42% |
| Sightseeing | 34% | 33% |
| Attractions | 26% | 25% |
| Visiting Friends/Relatives | 21% | 24% |
| Photography | 21% | 21% |
| Watching Wildlife | 19% | 20% |
| Bicycle Riding | 11% | 16%a |
| Exercise / Working Out | 13% | 15% |
| Bars / Nightlife | 13% | 14% |
| Birdwatching | 9% | 13%a |
| Fishing | 12% | 12% |
| Boating | 10% | 11% |
| Miniature Golf | 9% | 10% |
| Parasailing / Jet Skiing | 9% | 9% |
| Kayaking / Canoeing | 7% | 7% |
| Golfing | 6% | 7% |
| Sporting Event | 2% | 5%a |
| Guided Tour | 6% | 4% |
| Cultural Events | 3% | 4% |
| Tennis | 3% | 3% |
| Scuba Diving / Snorkeling | 3% | 2% |
| Other | 1% | 3%a |
| No Answer | 1% | <1% |



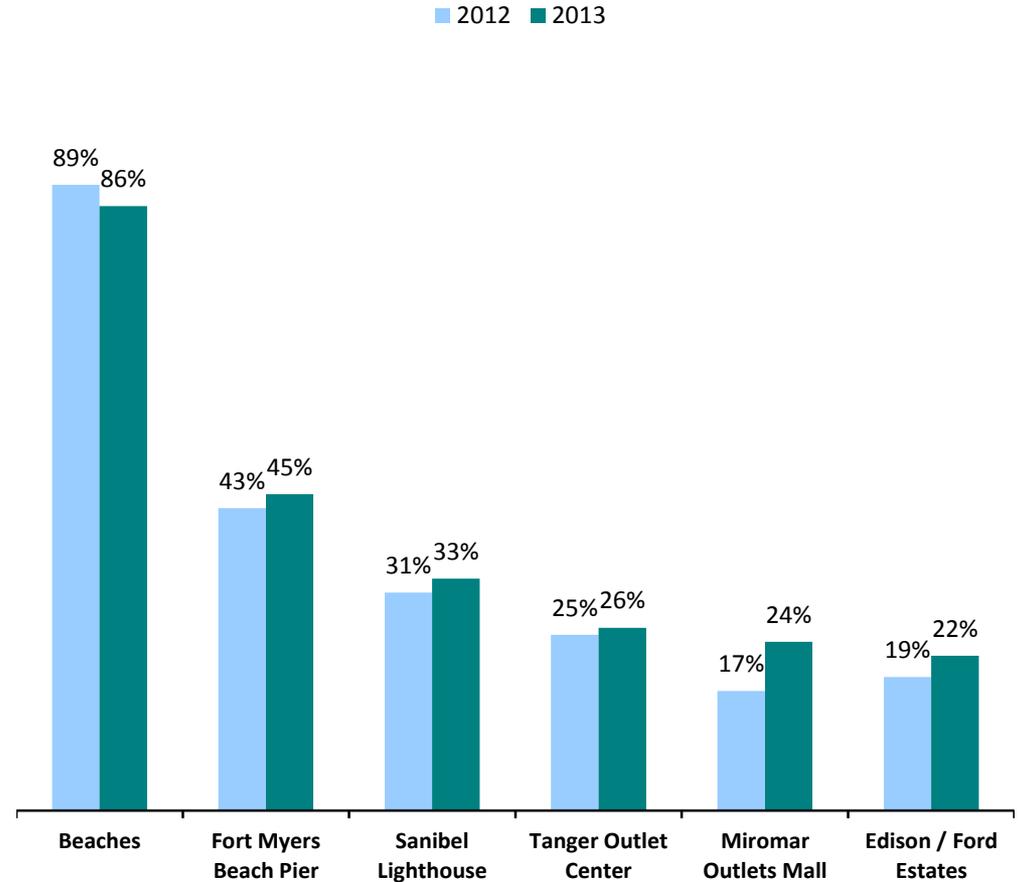
Q23: What activities or interests are you enjoying while in Lee County?
(Please mark ALL that apply.)

Trip Activities

| Attractions Visited | | |
|---------------------------------------|------------|------------|
| Summer Season | 2012 | 2013 |
| | A | B |
| Total Respondents | 617 | 921 |
| Beaches | 89% | 86% |
| Fort Myers Beach Pier | 43% | 45% |
| Sanibel Lighthouse | 31% | 33% |
| Tanger Outlet Center | 25% | 26% |
| Miromar Outlets Mall | 17% | 24%a |
| Edison / Ford Estates | 19% | 22% |
| Periwinkle Place | 12% | 14% |
| Coconut Point Mall | 11% | 13% |
| Ding Darling National Wildlife Refuge | 11% | 12% |
| Shell Factory and Nature Park | 10% | 12% |
| Bell Tower Shops | 10% | 12% |
| Edison Mall | 10% | 11% |
| Gulf Coast Town Center | 8% | 9% |
| Bailey-Matthews Shell Museum | 3% | 3% |
| Manatee Park | 3% | 3% |
| Broadway Palm Dinner Theater | 1% | 2% |
| Babcock Wilderness Adventures | 1% | 1% |
| Barbara B. Mann Performing Arts Hall | <1% | 1% |
| Other | 6% | 4% |
| None/No Answer | 4% | 5% |

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

Top Attractions Visited



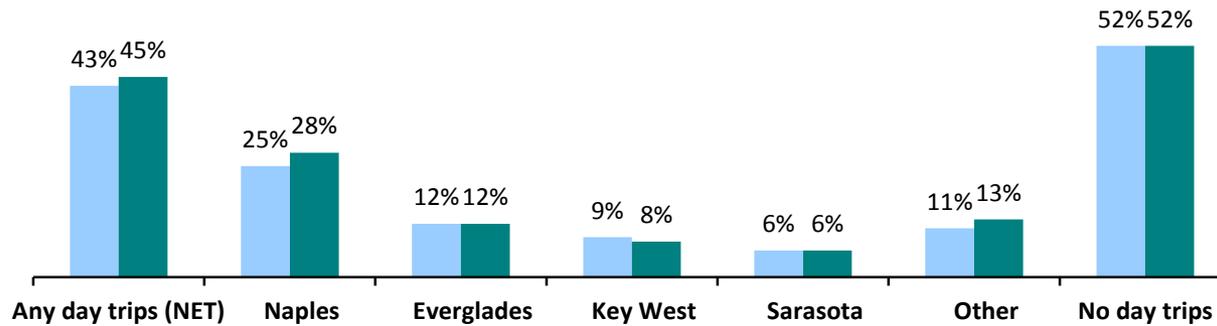
Trip Activities

| Day Trips Outside Lee County | | |
|------------------------------|------------|------------|
| Summer Season | 2012 | 2013 |
| | A | B |
| Total Respondents | 617 | 921 |
| <u>Any day trips (NET)</u> | <u>43%</u> | <u>45%</u> |
| <i>Naples</i> | 25% | 28% |
| <i>Everglades</i> | 12% | 12% |
| <i>Key West</i> | 9% | 8% |
| <i>Sarasota</i> | 6% | 6% |
| <i>Other</i> | 11% | 13% |
| <u>No day trips</u> | <u>52%</u> | <u>52%</u> |
| No Answer | 11% | 11% |

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

Day Trips Outside Lee County

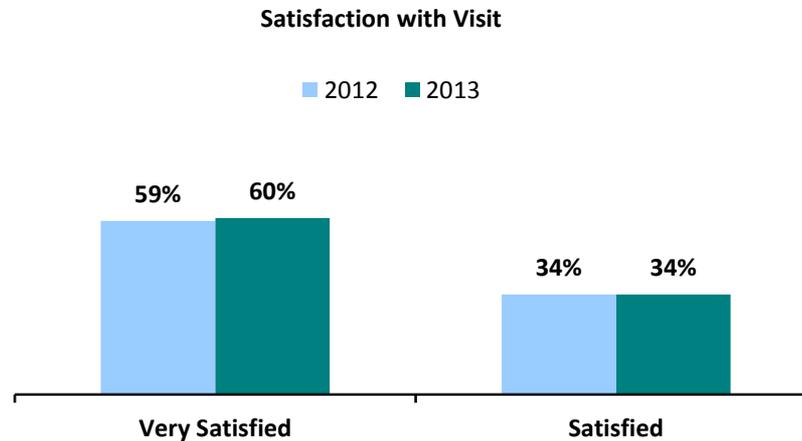
■ 2012 ■ 2013



Lee County Experience

| Satisfaction with Visit | | |
|---------------------------------|------------|------------|
| Summer Season | 2012 | 2013 |
| | A | B |
| Total Respondents | 617 | 921 |
| <u>Very Satisfied/Satisfied</u> | <u>94%</u> | <u>94%</u> |
| <i>Very Satisfied</i> | 59% | 60% |
| <i>Satisfied</i> | 34% | 34% |
| Neither | 2% | 2% |
| Dissatisfied/Very Dissatisfied | <1% | 1% |
| Don't know/no answer | 4% | 3% |

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



Future Plans

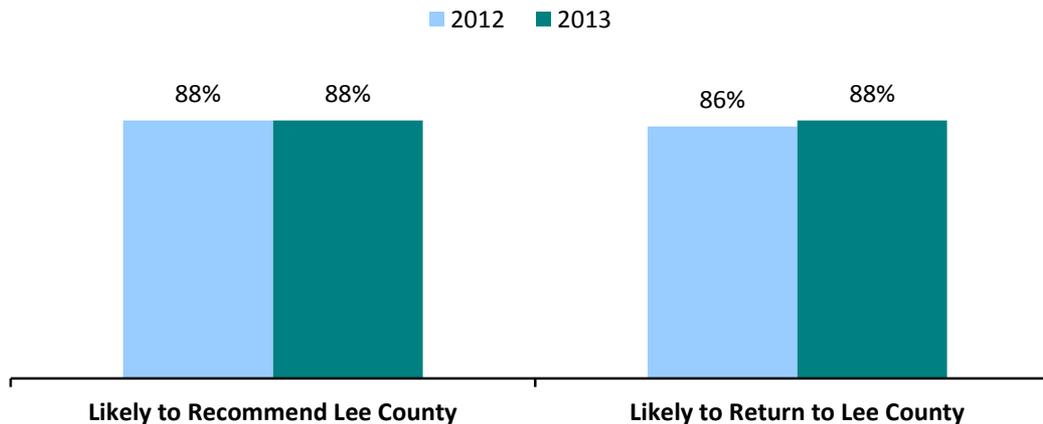
| Likelihood to Recommend/Return to Lee County | | |
|---|------------|------------|
| Summer Season | 2012 | 2013 |
| | A | B |
| Total Respondents | 617 | 921 |
| Likely to Recommend Lee County | 88% | 88% |
| Likely to Return to Lee County | 86% | 88% |
| Base: Total Respondents Planning to Return | 533 | 812 |
| Likely to Return Next Year | 55% | 56% |

Q27: Would you recommend Lee County to a friend over other vacation areas in Florida?

Q31: Will you come back to Lee County?

Q32: Will you come back next year?

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

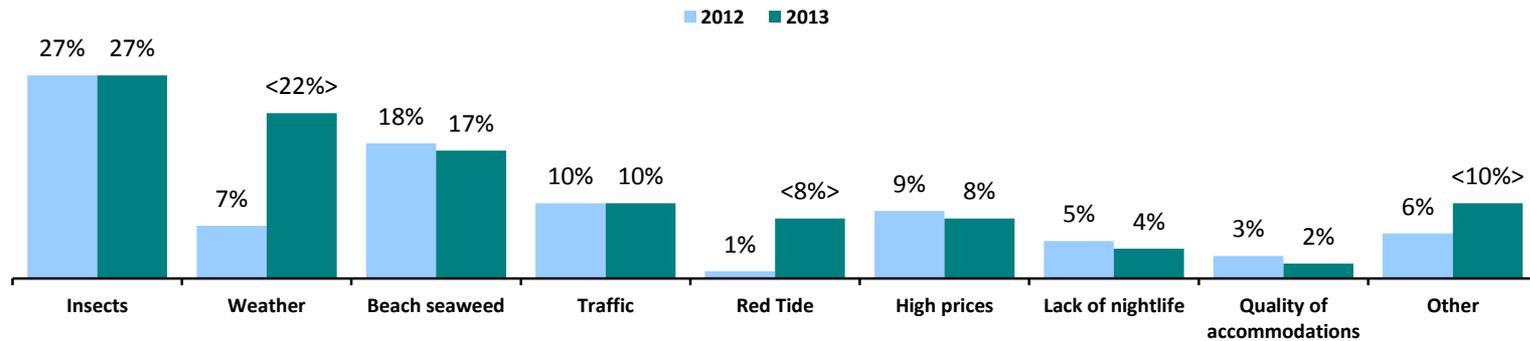


Trip Activities

| Least Liked Features | | |
|---------------------------|------------|------------|
| Summer Season | 2012 | 2013 |
| | A | B |
| Total Respondents | 617 | 921 |
| Insects | 27% | 27% |
| Weather | 7% | 22%a |
| Beach seaweed | 18% | 17% |
| Traffic | 10% | 10% |
| Red Tide | 1% | 8%a |
| High prices | 9% | 8% |
| Lack of nightlife | 5% | 4% |
| Quality of accommodations | 3% | 2% |
| Other | 6% | 10%a |
| Nothing/No Answer (NET) | 39%b | 29% |

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

Least Liked Features

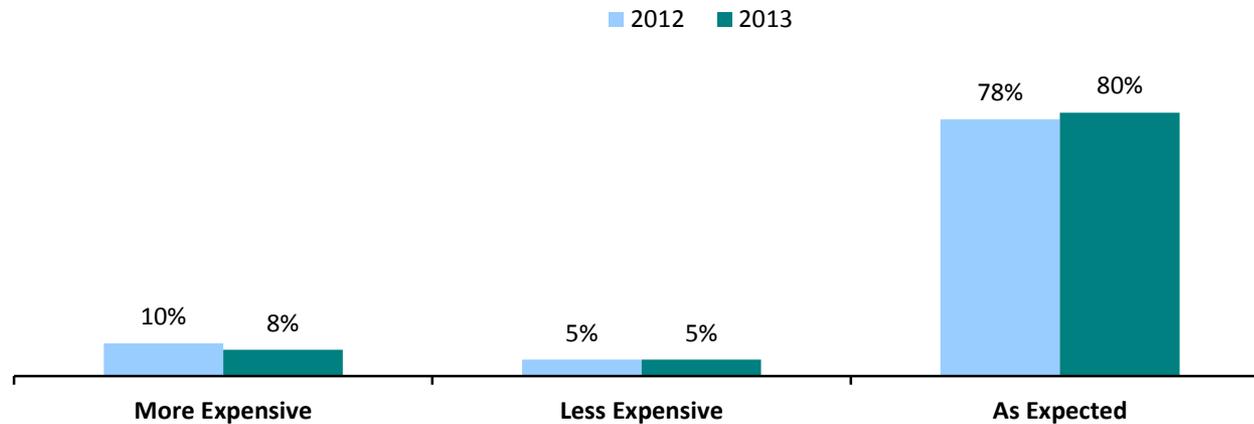


Trip Activities

| Perception of Lee County as Expensive | | |
|---------------------------------------|------------|------------|
| Summer Season | 2012 | 2013 |
| | A | B |
| Total Respondents | 617 | 921 |
| More Expensive | 10% | 8% |
| Less Expensive | 5% | 5% |
| As Expected | 78% | 80% |
| Don't know/No Answer (NET) | 8% | 6% |

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

Perception of Lee County as Expensive



Visitor and Travel Party Demographic Profile

| Visitor Demographic Profile | | |
|--------------------------------|------------|------------|
| Summer Season | 2012 | 2013 |
| | A | B |
| Total Respondents | 617 | 921 |
| Age of respondent (mean) | 47.3 | 48.1 |
| Annual household income (mean) | \$102,362 | \$104,259 |
| Martial Status | | |
| Married | 73% | 69% |
| Single | 11% | 13% |
| Vacations per year (mean) | 2.4 | 2.9a |
| Short getaways per year (mean) | 3.5 | 3.5 |

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 | | |
|-----------------------------|------------|------------|
| Summer Season | 2012 | 2013 |
| | B | B |
| Total Respondents | 617 | 921 |
| Family | 49% | 47% |
| Couple | 33% | 32% |
| Group of couples/friends | 11% | 12% |
| Single | 5% | 6% |
| Mean travel party size | 3.5 | 3.4 |
| Mean adults in travel party | 2.7 | 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 | | |
|--|------------|------------|
| Summer Season | 2012 | 2013 |
| | A | B |
| Total Respondents | 617 | 921 |
| <u>Traveling with any Children (net)</u> | <u>38%</u> | <u>37%</u> |
| Any younger than 6 | 12% | 13% |
| Any ages 6-11 | 18% | 16% |
| Any 12-17 years old | 23% | 22% |
| No Children | 62% | 63% |

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 | | | | | |
|-------------------------|------|------|-------------------|-----------|----------|
| | % | | Visitor Estimates | | % Change |
| Summer Season | 2012 | 2013 | 2012 | 2013 | |
| Paid Accommodations | 55% | 59% | 546,952 | 624,158 | 14.1% |
| Friends/Relatives | 45% | 41% | 448,640 | 428,409 | -4.5% |
| <i>Total Visitation</i> | | | 995,592 | 1,052,567 | 5.7% |

| Paid Accommodations Visitors | | | | | |
|------------------------------|------|------|-------------------|---------|----------|
| | % | | Visitor Estimates | | % Change |
| Country of Origin | 2012 | 2013 | 2012 | 2013 | |
| United States | 75% | 74% | 410,214 | 463,861 | 13.1% |
| Germany | 9% | 9% | 47,614 | 54,100 | 13.6% |
| UK | 4% | 4% | 24,418 | 28,052 | 14.9% |
| Canada | 3% | 3% | 13,430 | 19,035 | 41.7% |
| Scandinavia | 2% | 2% | 12,209 | 14,026 | 14.9% |
| France | 2% | 2% | 8,546 | 11,020 | 29.0% |
| BeNeLux | 1% | 1% | 6,104 | 8,015 | 31.3% |
| Switzerland | 1% | 1% | 3,663 | 7,013 | 91.5% |
| Austria | - | 1% | - | 6,011 | - |
| Ireland | <1% | 1% | 2,442 | 5,009 | 105.2% |
| Latin America | 1% | <1% | 3,663 | 1,002 | -72.6% |
| Other International | 2% | 1% | 12,209 | 5,009 | -58.9% |
| No Answer | <1% | <1% | 2,442 | 2,004 | -17.9% |
| U.S. Region of Origin | 2012 | 2013 | 2012 | 2013 | % Change |
| Florida | 22% | 22% | 89,124 | 103,191 | 15.8% |
| South (including Florida) | 39% | 45% | 158,714 | 207,385 | 30.7% |
| Midwest | 37% | 33% | 151,389 | 155,288 | 2.6% |
| Northeast | 18% | 17% | 75,694 | 77,143 | 1.9% |
| West | 2% | 2% | 9,767 | 9,017 | -7.7% |
| No Answer | 4% | 3% | 14,651 | 15,028 | 2.6% |

< > indicates a significant difference between 2011 and 2012 responses at the 95% confidence level.

| 2013 Top DMAs (Paid Accommodations) | | |
|-------------------------------------|----|--------|
| Miami-Fort Lauderdale | 6% | 29,054 |
| New York | 6% | 28,052 |
| Tampa-Saint Petersburg (Sarasota) | 5% | 24,045 |
| Saint Louis | 5% | 21,039 |
| Indianapolis | 4% | 19,035 |
| Chicago | 4% | 17,032 |
| Philadelphia | 3% | 15,028 |
| Atlanta | 3% | 15,028 |
| Cincinnati | 3% | 14,026 |
| West Palm Beach-Fort Pierce | 3% | 14,026 |
| Orlando-Daytona Beach-Melbourne | 3% | 14,026 |

Note: The percentage of visitors by origin market is based on data collected from visitors in the Visitor Profile Survey.

Occupancy Data Analysis Summer 2013

For the 2013 summer season, property managers were interviewed in October 2013 to provide data for each specific month of the season (July, August, and September 2013).

For the 2012 summer season, property managers were interviewed in August 2012, September 2012, and October 2012 to provide data for the preceding month.

Occupancy/Daily Rates

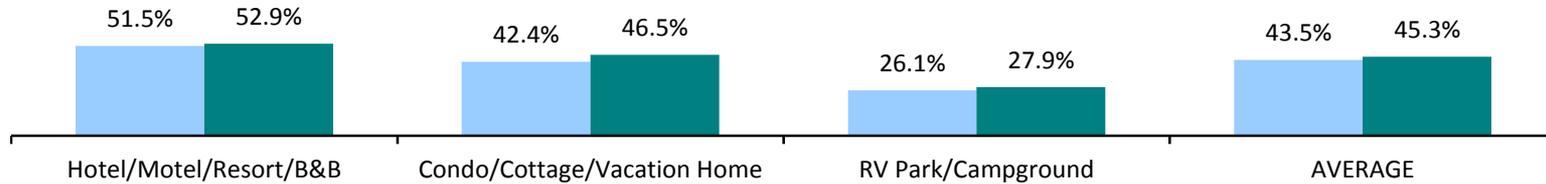
| Summer Season | Average Occupancy Rate | | | Average Daily Rate | | | RevPAR | | |
|-----------------------------|------------------------|--------------|-------------|--------------------|-----------------|-------------|----------------|----------------|-------------|
| | 2012 | 2013 | % Change | 2012 | 2013 | % Change | 2012 | 2013 | % Change |
| Hotel/Motel/Resort/B&B | 51.5% | 52.9% | 2.7% | \$110.31 | \$115.41 | 4.6% | \$56.86 | \$61.02 | 7.3% |
| Condo/Cottage/Vacation Home | 42.4% | 46.5% | 9.7% | \$133.28 | \$145.85 | 9.4% | \$56.49 | \$67.81 | 20.0% |
| RV Park/Campground | 26.1% | 27.9% | 6.9% | \$40.13 | \$37.69 | -6.1% | \$10.47 | \$10.52 | 0.5% |
| AVERAGE | 43.5% | 45.3% | 4.1% | \$105.62 | \$110.62 | 4.7% | \$45.90 | \$50.11 | 9.2% |

Q16: What was your overall average occupancy rate for the month of [July/August/September]?

Q17: What was your average daily rate (ADR) in [July/August/September]?

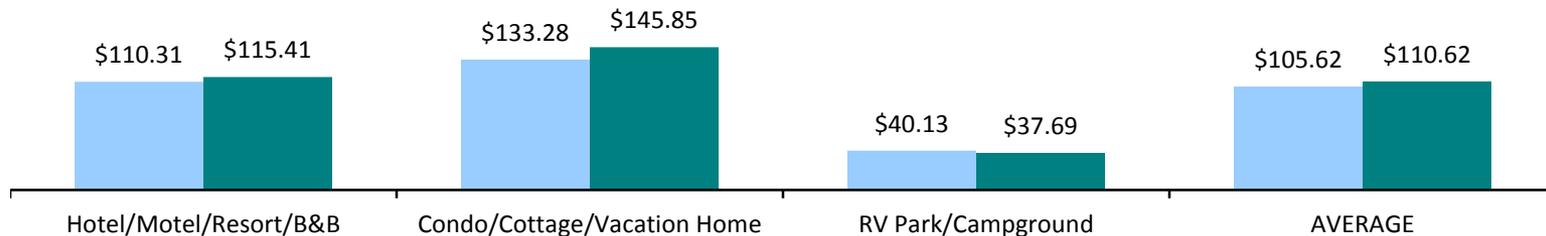
Average Occupancy Rate

■ 2011 ■ 2012



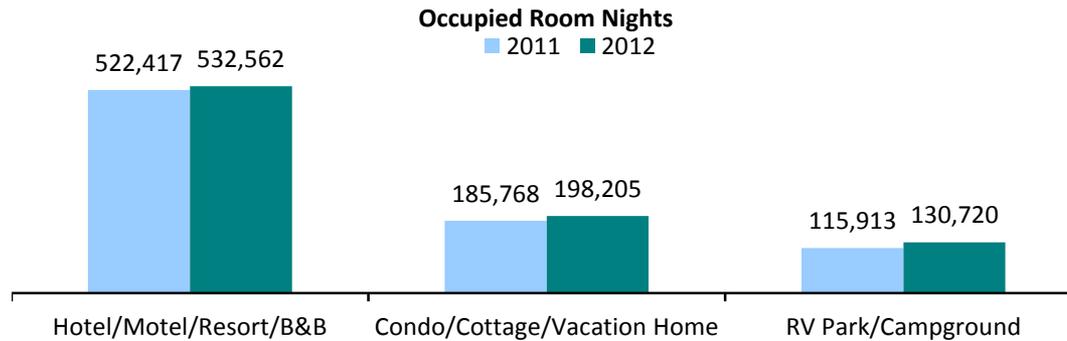
Average Daily Rate

■ 2011 ■ 2012



Room/Unit/Site Nights

| Summer Season | Occupied Room Nights | | | Available Room Nights | | |
|-----------------------------|----------------------|----------------|-------------|-----------------------|------------------|-------------|
| | 2012 | 2013 | % Change | 2012 | 2013 | % Change |
| Hotel/Motel/Resort/B&B | 522,417 | 532,562 | 1.9% | 1,013,580 | 1,007,222 | -0.6% |
| Condo/Cottage/Vacation Home | 185,768 | 198,205 | 6.7% | 438,269 | 426,320 | -2.7% |
| RV Park/Campground | 115,913 | 130,720 | 12.8% | 444,463 | 468,242 | 5.4% |
| Total | 824,098 | 861,487 | 4.5% | 1,896,312 | 1,901,784 | 0.3% |

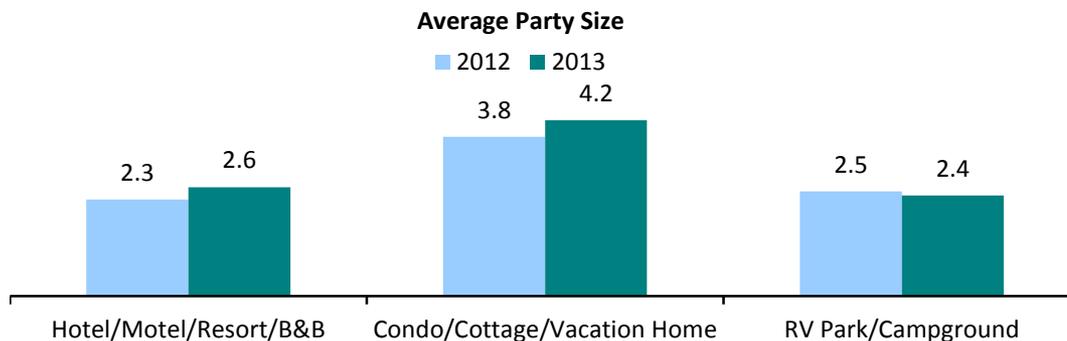


Average Party Size and Length of Stay

| Summer Season | Average Party Size | | | Average Length of Stay | | |
|-----------------------------|--------------------|------------|-------------|------------------------|------------|-------------|
| | 2012 | 2013 | % Change | 2012 | 2013 | % Change |
| Hotel/Motel/Resort/B&B | 2.3 | 2.6 | 13.0% | 3.0 | 3.0 | 0.0% |
| Condo/Cottage/Vacation Home | 3.8 | 4.2 | 10.5% | 6.6 | 6.9 | 4.5% |
| RV Park/Campground | 2.5 | 2.4 | -4.0% | 7.2 | 6.4 | -11.1% |
| Average | 2.7 | 2.9 | 7.4% | 4.0 | 4.0 | 0.0% |

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

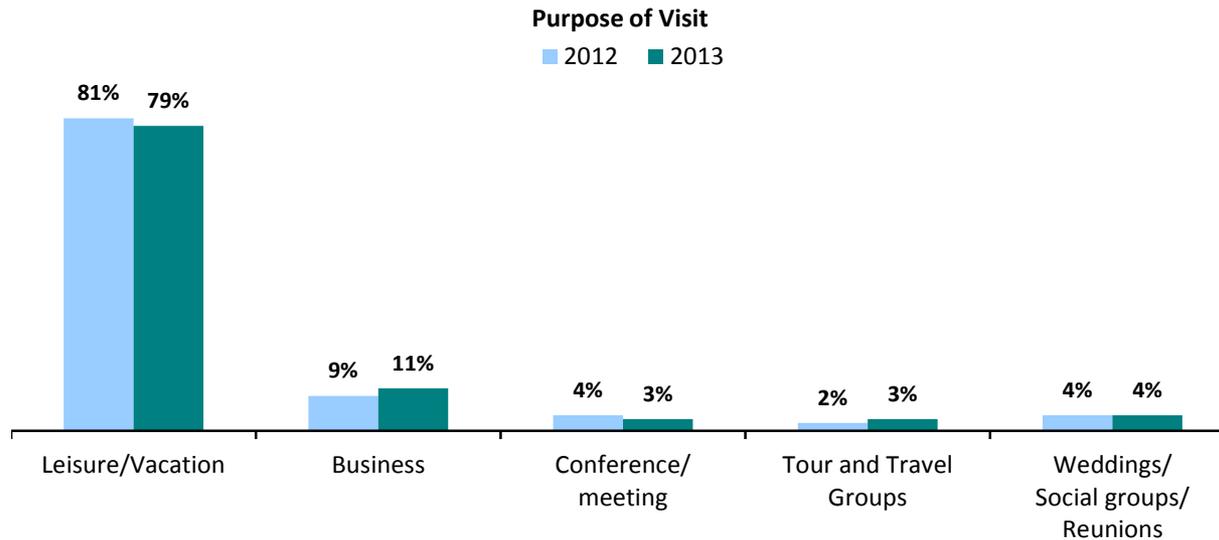
Q19: What was the average length of stay (in nights) of your guests in [April/May/June]?



Lodging Management Estimates

| Guest Profile | | |
|---------------------------------------|------------|------------|
| Summer Season | 2012 | 2013 |
| | A | B |
| Property Managers Responding | 271 | 107 |
| <u>Purpose of Visit</u> | | |
| Leisure/Vacation | 81% | 79% |
| Business | 9% | 11% |
| Conference/meeting | 4% | 3% |
| Tour and Travel Groups | 2% | 3% |
| Weddings/Social groups/Reunions (net) | 4% | 4% |

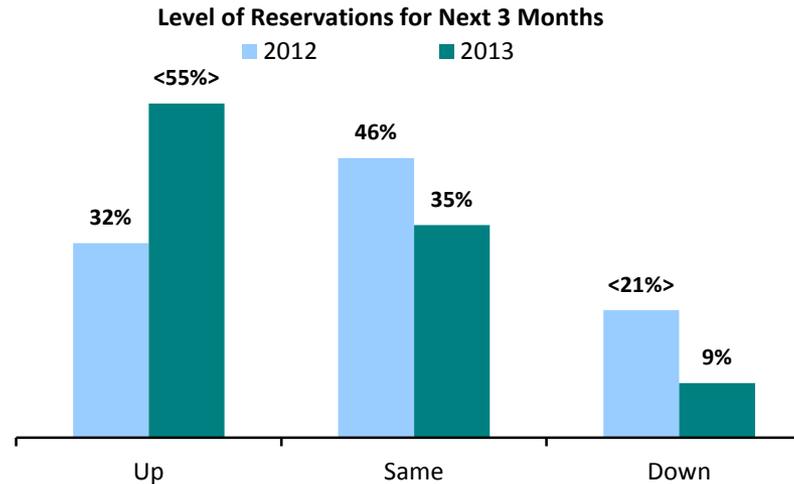
Q22: What percent of your [July/August/September] room/site/unit occupancy do you estimate was generated by:



Occupancy Barometer

| Level of Reservations for Next 3 Months Compared to Last Year | | |
|---|------|------|
| Summer Season | 2012 | 2013 |
| | A | B |
| Property Managers Responding | 100* | 117 |
| Up/Same (net) | 78% | 90%a |
| Up | 32% | 55%a |
| Same | 46% | 35% |
| Down | 21%b | 9% |

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



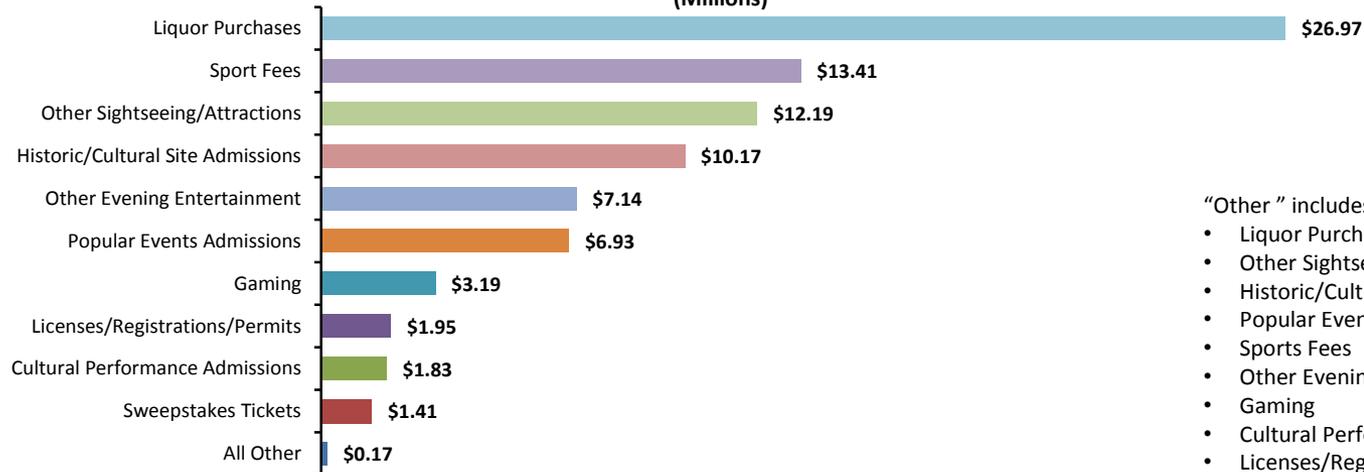
*Note: Only includes those property managers interviewed in October 2012 for direct comparability to those interviewed in October 2013.

Economic Impact Analysis Summer 2013

Total Visitor Expenditures by Spending Category

| TOTAL EXPENDITURES | | | |
|------------------------|----------------------|----------------------|-------------|
| Summer Season | 2012 | 2013 | % Change |
| <u>TOTAL</u> | <u>\$457,496,167</u> | <u>\$469,867,023</u> | <u>2.7%</u> |
| Food and Beverages | \$124,944,457 | \$125,995,356 | 0.8% |
| Shopping | \$120,150,017 | \$123,608,014 | 2.9% |
| Lodging Accommodations | \$87,039,117 | \$95,295,729 | 9.5% |
| Ground Transportation | \$40,390,098 | \$39,597,064 | -2.0% |
| Other | \$84,972,478 | \$85,370,860 | 0.5% |

Summer 2013 "Other" Expenditures
(Millions)



"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

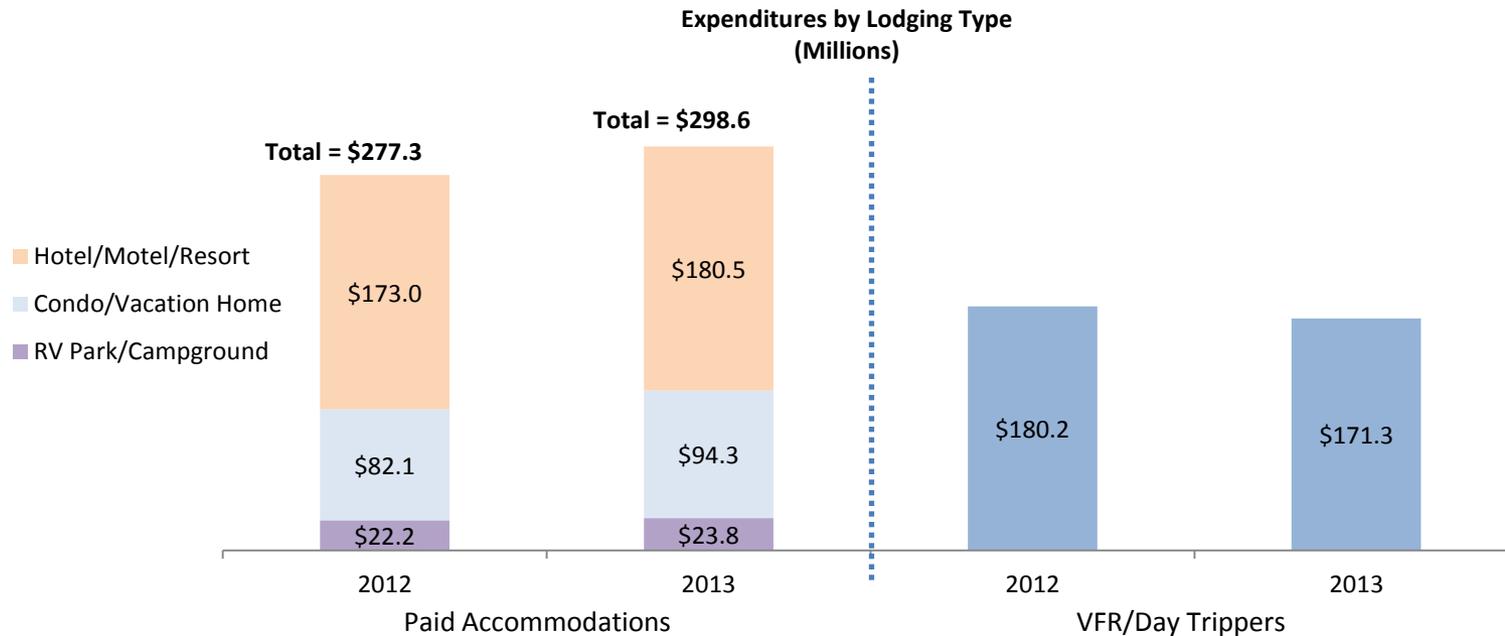
| TOTAL EXPENDITURES | | | | | | |
|------------------------|-----------------------------|----------------------|-------------|---|----------------------|--------------|
| | Staying Paid Accommodations | | | Visiting Friends and Relatives/Day Trippers | | |
| Summer Season | 2012 | 2013 | % Change | 2012 | 2013 | % Change |
| TOTAL | <u>\$277,271,867</u> | <u>\$298,563,087</u> | <u>7.7%</u> | <u>\$180,224,300</u> | <u>\$171,303,936</u> | <u>-4.9%</u> |
| Lodging Accommodations | \$87,039,117 | \$95,295,729 | 9.5% | \$0 | \$0 | |
| Food and Beverages | \$65,459,699 | \$69,695,704 | 6.5% | \$59,484,758 | \$56,299,652 | -5.4% |
| Shopping | \$62,014,783 | \$66,829,595 | 7.8% | \$58,135,234 | \$56,778,419 | -2.3% |
| Ground Transportation | \$21,778,238 | \$22,679,850 | 4.1% | \$18,611,860 | \$16,917,214 | -9.1% |
| Other | \$40,980,030 | \$44,062,209 | 7.5% | \$43,992,448 | \$41,308,651 | -6.1% |

“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 | | | | | |
|---|----------------------|----------------------|--------------|-------------|-------------|
| Summer Season | 2012 | 2013 | % Change | 2012 | 2013 |
| <u>TOTAL</u> | <u>\$457,496,167</u> | <u>\$469,867,023</u> | <u>2.7%</u> | <u>100%</u> | <u>100%</u> |
| Visiting Friends & Relatives/Day Trippers | \$180,224,300 | \$171,303,936 | -4.9% | 39% | 36% |
| <u>Paid Accommodations</u> | <u>\$277,271,867</u> | <u>\$298,563,087</u> | <u>7.7%</u> | <u>61%</u> | <u>64%</u> |
| <i>Hotel/Motel/Resort/B&B</i> | <i>\$172,959,854</i> | <i>\$180,504,843</i> | <i>4.4%</i> | <i>38%</i> | <i>38%</i> |
| <i>Condo/Cottage/Vacation Home</i> | <i>\$82,118,932</i> | <i>\$94,271,036</i> | <i>14.8%</i> | <i>18%</i> | <i>20%</i> |
| <i>RV Park/Campground</i> | <i>\$22,193,081</i> | <i>\$23,787,208</i> | <i>7.2%</i> | <i>5%</i> | <i>5%</i> |



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.

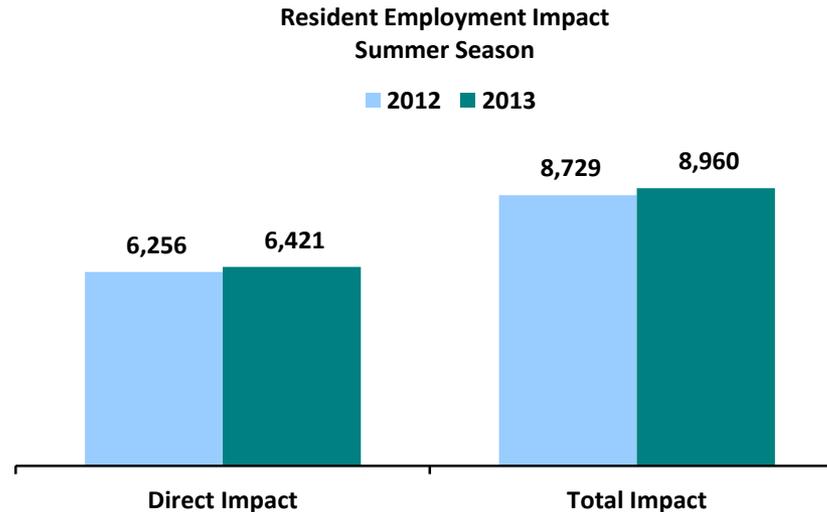
Impact on Jobs for Lee County Residents

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.).



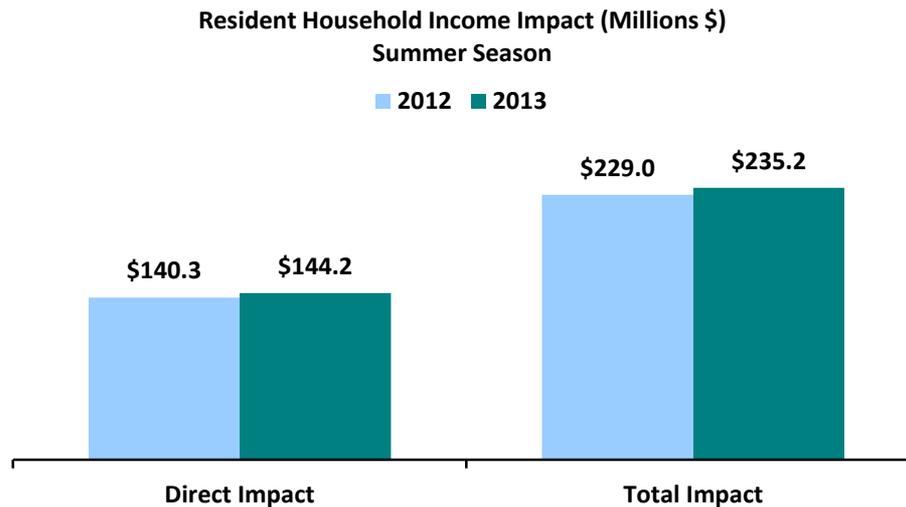
Impact on Household Income for Lee County Residents

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.

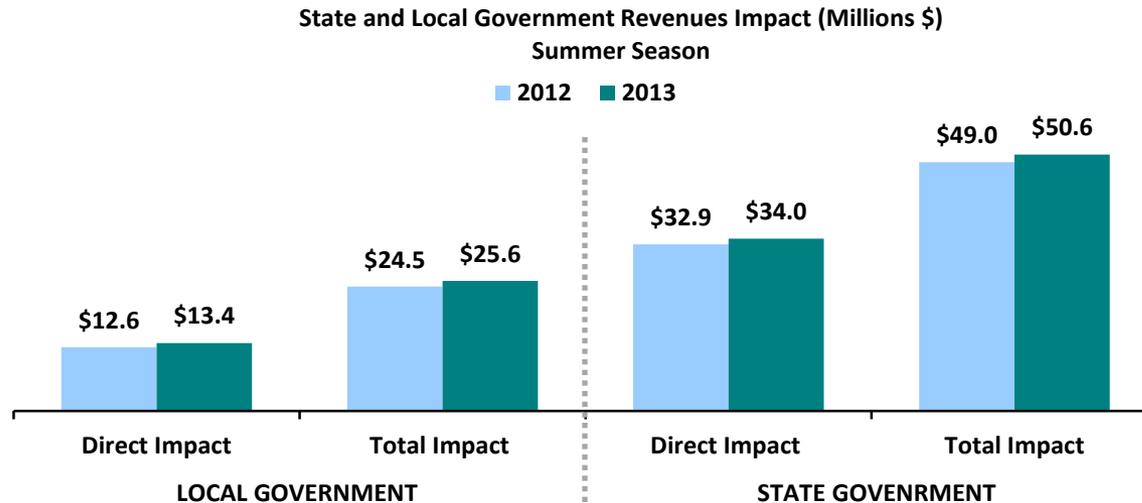
The gross government revenues accruing to governments as a result of producing the output purchased with visitor expenditures is the government revenue impact.

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
Summer 2013

July 2013 Interviewing Statistics

| City | Event/Location | Interviewing Dates | Number of Interviews |
|------------------|-----------------------------|--------------------|----------------------|
| Fort Myers | RSW Airport | 7/6/2013 | 30 |
| Fort Myers Beach | Lani Kai | 7/7/2013 | 5 |
| Fort Myers Beach | Estero Island Beach Club | 7/7/2013 | 10 |
| Fort Myers Beach | Diamond Head | 7/7/2013 | 10 |
| Fort Myers Beach | Neptune Resort | 7/7/2013 | 10 |
| Sanibel | Ocean Reach | 7/12/2013 | 10 |
| Sanibel | Casa Ybel | 7/12/2013 | 5 |
| Sanibel | Island Beach Club | 7/12/2013 | 5 |
| Sanibel | Villa Sanibel | 7/12/2013 | 4 |
| Sanibel | Sanibel Cottages | 7/12/2013 | 5 |
| Sanibel | Pointe Santo | 7/12/2013 | 10 |
| Fort Myers | Edison Estates | 7/16/2013 | 14 |
| Fort Myers Beach | Best Western | 7/18/2013 | 10 |
| Fort Myers Beach | Winward Passage | 7/18/2013 | 5 |
| Fort Myers Beach | Beach Club I | 7/18/2013 | 5 |
| Fort Myers Beach | Kona Beach | 7/18/2013 | 5 |
| Fort Myers Beach | Pink Shell | 7/18/2013 | 10 |
| Sanibel | Compass Point | 7/23/2013 | 10 |
| Sanibel | Holiday Inn | 7/23/2013 | 9 |
| Sanibel | Pelican Roost | 7/23/2013 | 6 |
| Cape Coral | Cape Coral Yacht Club Beach | 7/25/2013 | 15 |
| Bonita Springs | Bonita Beach | 7/26/2013 | 33 |
| Fort Myers | RSW Airport | 7/27/2013 | 30 |
| Fort Myers | Edison Estates | 7/29/2013 | 30 |
| Fort Myers | Crowne Plaza | 7/30/2013 | 7 |
| North Fort Myers | Shell Factory | 7/30/2013 | 15 |
| | | | |
| Total | | | 308 |

August 2013 Interviewing Statistics

| City | Event/Location | Interviewing Dates | Number of Interviews |
|------------------|-----------------------------|--------------------|----------------------|
| Fort Myers | RSW Airport | 8/3/2013 | 30 |
| Sanibel | Ocean Reach | 8/5/2013 | 5 |
| Sanibel | Pointe Santo | 8/5/2013 | 10 |
| Sanibel | Sanibel Cottages | 8/5/2013 | 4 |
| Sanibel | Casa Ybel | 8/5/2013 | 10 |
| Sanibel | Tarpon Beach | 8/5/2013 | 5 |
| Fort Myers Beach | Pink Shell | 8/8/2013 | 10 |
| Fort Myers Beach | Best Western | 8/8/2013 | 10 |
| Fort Myers Beach | Casa Playa | 8/8/2013 | 5 |
| Fort Myers Beach | Winward Passage | 8/8/2013 | 6 |
| Fort Myers | Edison Estates | 8/13/2013 | 21 |
| Sanibel | Lighthouse Beach | 8/15/2013 | 17 |
| Sanibel | Sundial | 8/15/2013 | 10 |
| Sanibel | Sanibel Siesta | 8/15/2013 | 7 |
| Sanibel | Holiday Inn | 8/15/2013 | 5 |
| Fort Myers Beach | Estro Island Beach Club | 8/19/2013 | 10 |
| Fort Myers Beach | Diamond Head Resort | 8/19/2013 | 10 |
| Fort Myers Beach | Neptune Inn | 8/19/2013 | 10 |
| Fort Myers Beach | Times Square | 8/19/2013 | 7 |
| Bonita Springs | Bonita Beach | 8/23/2013 | 31 |
| Cape Coral | Cape Coral Yacht Club Beach | 8/26/2013 | 14 |
| Fort Myers | Edison Estates | 8/28/2013 | 25 |
| Fort Myers | Crowne Plaza | 8/30/2013 | 5 |
| North Fort Myers | Shell Factory | 8/30/2013 | 14 |
| Fort Myers | RSW Airport | 8/31/2013 | 30 |
| | | | |
| Total | | | 311 |

September 2013 Interviewing Statistics

| City | Event/Location | Interviewing Dates | Number of Interviews |
|------------------|-------------------------------------|--------------------|----------------------|
| Cape Coral | Cape Coral Yacht Club Beach | 9/2/2013 | 8 |
| Fort Myers | RSW Airport | 9/5/2013 | 29 |
| Fort Myers Beach | Estro Island Beach Club | 9/10/2013 | 10 |
| Fort Myers Beach | Times Square | 9/10/2013 | 7 |
| Fort Myers Beach | Lani Kai | 9/10/2013 | 6 |
| Fort Myers Beach | Diamond Head | 9/10/2013 | 10 |
| Fort Myers Beach | Neptune | 9/10/2013 | 7 |
| Sanibel | Sundial Resort | 9/13/2013 | 9 |
| Sanibel | Holiday Inn | 9/13/2013 | 4 |
| Sanibel | Sanibel Surfside | 9/13/2013 | 3 |
| Sanibel | Signal Inn Beach & Racquetball club | 9/13/2013 | 4 |
| Sanibel | Ocean Reach | 9/13/2013 | 11 |
| Sanibel | Lighthouse Beach | 9/20/2013 | 16 |
| Sanibel | Casa Ybel | 9/20/2013 | 6 |
| Sanibel | Pointe Santo | 9/20/2013 | 10 |
| Sanibel | Sanibel Cottages | 9/20/2013 | 3 |
| Fort Myers | Edison Estates | 9/21/2013 | 15 |
| Bonita Springs | Bonita Beach | 9/22/2013 | 35 |
| North Fort Myers | Shell Factory | 9/25/2013 | 16 |
| Fort Myers | Crowne Plaza | 9/26/2013 | 4 |
| Cape Coral | Cape Coral Yacht Club Beach | 9/26/2013 | 2 |
| Fort Myers Beach | Best Western | 9/27/2013 | 9 |
| Fort Myers Beach | Winward Passage | 9/27/2013 | 9 |
| Fort Myers Beach | Pink Shell | 9/27/2013 | 9 |
| Fort Myers | RSW Airport | 9/28/2013 | 30 |
| Fort Myers | Edison Estates | 9/30/2013 | 30 |
| | | | |
| Total | | | 302 |

Occupancy Interviewing Statistics

Interviews were conducted during the first two weeks of October 2013 to gather data for July, August, and September 2013 lodging activity. Information was provided by 127 Lee County lodging properties.

| Lodging Type | Summer 2013 Number of Interviews |
|---------------------------------------|-------------------------------------|
| Hotel/Motel/Resort/B&Bs | 78 |
| Condo/Cottage/Vacation Home/Timeshare | 33 |
| RV Park/Campground | 16 |
| Total | 127 |