



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

Winter 2014 Visitor Profile and Occupancy Analysis

May 8, 2014

Prepared for:

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

Prepared by:

Davidson-Peterson Associates



Executive Summary

Winter 2014

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:

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 winter season of 2014, Lee County hosted approximately 777,539 visitors staying in paid accommodations and 642,459 staying with friends or relatives while visiting, for an estimated total of 1.42 million visitors.
- Winter 2014 visitation among paid accommodations guests was up 6.2% from 2013, but visitation among those staying with friends dropped 3.5%, resulting in a somewhat smaller net increase in total visitation year-over-year.

Estimated Visitation	Winter 2013	Winter 2014	% Change
Paid Accommodations	732,267	777,539	6.2%
Friends/Relatives	666,051	642,459	-3.5%
Total Visitation	1,398,318	1,419,998	1.6%

Visitor Expenditures

- Winter 2014 visitors spent an estimated \$1.07 billion during their stay in Lee County, a 2.3% increase from the prior winter expenditures (\$1.05 billion)
- Expenditures among winter 2014 paid accommodation guests amounted to \$763 million (71% of the total) – a notable increase over last year. Visitors staying with friends or relatives contributed the remaining \$311 million, representing a slight reduction year-over-year.

Estimated Expenditures	Winter 2013	Winter 2014	% Change
Paid Accommodations	\$736,972,483	\$763,319,329	3.6%
Friends/Relatives	\$313,075,730	\$311,390,478	-0.5%
Total Expenditures	\$1,050,048,213	\$1,074,709,807	2.3%

Visitor Origin

- Most of the winter 2014 visitors staying in paid accommodations reside within the United States (84%). The top international feeder market was Canada (7%), followed by Germany as a distant second (3%).
- Similar to last year over half of domestic paid accommodations visitors came from the Midwest (55%). Nearly a quarter came from the Northeast (20%), with slightly fewer from South (13%) and far fewer from the West (3%).
- Minneapolis, Indianapolis, and Chicago were the top Midwest domestic feeder markets for the Lee County lodging industry during winter 2014. New York and Boston were the primary contributors from the Northeast region.

Winter 2014 Top DMAs (Paid Accommodations)		
Minneapolis-Saint Paul	10%	62,574
New York	5%	34,763
Indianapolis	5%	32,446
Chicago	5%	31,287
Boston	4%	28,969
Cleveland-Akron	3%	19,699
Detroit	2%	13,905
Philadelphia	2%	13,905
Saint Louis	2%	13,905
Cincinnati	2%	12,747

Visitors Staying in Paid Accommodations					
Winter Season	%		Visitor Estimates		% Change
	2013	2014	2013	2014	
Country of Origin					
United States	79%	84%	582,058	654,709	12.5%
Canada	9%	7%	64,060	52,145	-18.6%
Germany	5%	3%	37,552	20,858	-44.5%
Scandinavia	2%	2%	13,254	16,223	22.4%
UK	2%	1%	16,567	10,429	-37.1%
BeNeLux	<1%	1%	3,313	6,953	109.8%
Switzerland	<1%	<1%	3,313	2,318	-30.1%
France	-	<1%	-	2,318	-
Latin America	<1%	<1%	1,104	1,159	4.9%
Austria	1%	-	4,418	-	-
Ireland	<1%	-	2,209	-	-
Other International	-	1%	-	6,953	-
No Answer	1%	1%	4,418	3,476	-21.3%

Visitors Staying in Paid Accommodations					
Winter Season	%		Visitor Estimates		% Change
	2013	2014	2013	2014	
U.S. Region of Origin					
Florida	2%	2%	8,836	12,747	44.3%
South (including Florida)	12%	13%	67,373	82,273	22.1%
Midwest	57%	55%	331,343	362,697	9.5%
Northeast	23%	20%	133,641	133,259	-0.3%
West	2%	3%	8,836	17,382	96.7%
No Answer	7%	9%	40,866	59,098	44.6%

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

Trip Planning

- Many of Lee County's winter 2014 visitors began planning their trip 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. While their enthusiasm to plan their trip was high, fewer winter 2014 visitors made their lodging reservations within that window.
 - 71% started talking about trip 3+ months in advance (vs. 70% in 2013)
 - 65% chose Lee County for trip (vs. 64% in 2013)
 - 55% made lodging reservation (vs. 55% in 2013)
- When planning their trip, nine in ten visitors used the Internet to their advantage, claiming to have visited one or more websites during the process. Visitors most often mention using airline websites (41%) and search engine websites (31%), followed by hotel (26%), vacation rental (26%), or booking (25%) websites.
- More than half of visitors indicated they typically use their laptop to access destination planning information online (61%). Slightly fewer than half use their desktop computer (45%) and the same number are using their using smartphones (44%). A sizeable minority of winter 2014 visitors reported using tablets (40%) to access this online content, and the incidence was higher than that reported by winter 2013 visitors (28%).
- Not surprisingly, almost all winter 2014 visitors said that Lee County's *warm weather* positively influenced their decision to visit (94%). Additionally, *peaceful/relaxing* (84%), *white sandy beaches* (77%), and *a safe destination* (73%) were attributes rated favorably as being important in winter visitors' selection of the destination.

Visitor Profile

- Two-thirds of winter 2014 visitors flew to their destination – on par with last year's incidence (68% vs. 65% in 2013). Keeping with the same trend as last year, Southwest Florida International Airport remains the airport most often used (87%).
- The majority of 2014 winter visitors reported they were on vacation (87%) in Lee County. On average, visitors stayed 10 days in Lee County but were away from home for 12 days. Three-quarters are repeat visitors (76%) and have taken an average of four or five trips to Lee County in the past five years (4.4 mean).
- Among the winter 2014 visitors interviewed, four in ten indicated they were staying in hotel/motel/resort properties (41%). Similarly, about the same proportion were staying in condo/vacation home properties (44%) – mostly paid rentals. More than half of paid accommodation guests reported that the quality of their lodgings *met expectations* (55%) and another 41% said their accommodations *far exceeded or exceeded expectations*.

Visitor Profile (cont'd)

- While enjoying their winter 2014 Lee County trip, visitors were most interested in activities such as: *beaches* (90%), *relaxing* (79%), *dining out* (77%), and *shopping* (57%). Nearly half of visitors ventured on a day trip outside of Lee County (48%), most traveling to Naples (31%).
- Overall, visitors continue to be highly satisfied with their stay in Lee County and intent to return is quite high. The vast majority of winter 2014 visitors indicating they were either *very satisfied* or *satisfied* with their visit (62% and 34% respectively). Given the strong propensity for repeat visitation, it's not surprising that nine in ten winter visitors stated they are likely to come back to Lee County (89%), and 60% of them said they will return next year. Additionally, most visitors claimed they would recommend Lee County over other vacation areas in Florida (89%).
- Despite all of the positives the destination has to offer, about half of visitors cited *traffic* as negative aspect encountered during their trip (50%) – but no worse than reports among winter 2013 visitors (47%). Following at much lower levels of negative mentions were: *beach seaweed* (12%), *water quality* (12%), *high prices* (11%), and *weather* (10%).
- The demographic composition of winter 2014 visitors can be summarized as follows:
 - 57 years of age on average
 - \$107,600 household income on average
 - 77% married
 - 51% traveling as a couple
 - 22% traveling as a family
 - 86% traveling *without* children
 - 2 to 3 people in travel party on average

Lodging Industry Assessments

- For the Lee County lodging industry in total, both *available* and *occupied* room nights declined from winter 2013 to 2014. However, the decrease in *occupied* room nights (-49,283) was not nearly as great as the drop in *available* room nights (-107,418). The hotel/motel/resort category actually saw a slight increase in occupied room nights (+1.2%) where the other two categories did not.

Winter Season	Occupied Room Nights			Available Room Nights		
	2013	2014	% Change	2013	2014	% Change
Hotel/Motel/Resort/B&B	823,661	833,418	1.2%	1,006,447	990,748	-1.6%
Condo/Cottage/Vacation Home	380,674	335,699	-11.8%	452,266	394,464	-12.8%
RV Park/Campground	410,834	396,768	-3.4%	461,440	427,523	-7.4%
Total	1,615,169	1,565,886	-3.1%	1,920,153	1,812,735	-5.6%

- The net result of these shifts in *available* and *occupied* room nights was positive. Lee County's industry-wide average occupancy rate increased from 84.1% in winter 2013 to 86.4% in winter 2014 (+2.7%). All three categories posted growth in average occupancy rate, but RV parks/campgrounds did particularly well.
- Average daily rate for winter season 2014 was significantly higher than last year, with a 9.1% jump. Again, all three property categories enjoyed gains in ADR, especially the condo/vacation category which increased by 15.1%.
- Since both ADR and average occupancy rate rose year-over-year, the uptick in revenue per available room was sizeable (+12.1%). The increases were significant in each of the three property categories.

Winter Season	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2013	2014	% Change	2013	2014	% Change	2013	2014	% Change
Hotel/Motel/Resort/B&B	81.8%	84.1%	2.8%	\$173.79	\$186.29	7.2%	\$142.23	\$156.70	10.2%
Condo/Cottage/Vacation Home	84.2%	85.1%	1.1%	\$207.15	\$238.48	15.1%	\$174.36	\$202.95	16.4%
RV Park/Campground	89.0%	92.8%	4.2%	\$55.73	\$59.97	7.6%	\$49.62	\$55.66	12.2%
AVERAGE	84.1%	86.4%	2.7%	\$151.62	\$165.47	9.1%	\$127.54	\$142.94	12.1%

Lodging Industry Assessments (cont'd)

- According to reports from Lee County property managers, the outlook for spring season lodging reservations – April, May, and June – was very positive. Nine in ten property managers responding in early April 2014 noted that their level of reservations for April, May, and June was higher than the same period last year (56%), and a third said reservations are the same (35%). Very few claimed that their reservations are down for the next three months (8%). In contrast, property managers responded somewhat less favorably this time last year.

Winter 2014 Lee County Snapshot

Total Visitation				
Winter Season	%		Visitor Estimates	
	2013	2014	2013	2014
Paid Accommodations	52%	55%	732,267	777,539
Friends/Relatives	47%	45%	666,051	642,459
Total Visitation			1,398,318	1,419,998

Visitor Origin - Visitors Staying in Paid Accommodations				
Winter Season	%		Visitor Estimates	
	2013	2014	2013	2014
Florida	2%	2%	8,836	12,747
United States	79%	84%	582,058	654,709
Canada	9%	7%	64,060	52,145
Germany	5%	3%	37,552	20,858
UK	2%	1%	16,567	10,429
Other International	4%	5%	27,611	35,922
No Answer	<1%	<1%	4,418	3,476

Winter Season	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2013	2014	% Change	2013	2014	% Change	2013	2014	% Change
Hotel/Motel/Resort/B&B	81.8%	84.1%	2.8%	\$173.79	\$186.29	7.2%	\$142.23	\$156.70	10.2%
Condo/Cottage/Vacation Home	84.2%	85.1%	1.1%	\$207.15	\$238.48	15.1%	\$174.36	\$202.95	16.4%
RV Park/Campground	89.0%	92.8%	4.2%	\$55.73	\$59.97	7.6%	\$49.62	\$55.66	12.2%
AVERAGE	84.1%	86.4%	2.7%	\$151.62	\$165.47	9.1%	\$127.54	\$142.94	12.1%

Total Visitor Expenditures			
Winter Season	2013	2014	% Change
Total Visitor Expenditures	\$1,050,048,213	\$1,074,709,807	2.3%
Paid Accommodations	\$736,972,483	\$763,319,329	3.6%

Average Per Person Per Day Expenditures		
2013	2014	% Change
\$124.93	\$128.64	2.9%

First-Time/Repeat Visitors to Lee County		
Winter Season	2013	2014
First-time	20%	23%
Repeat	79%	76%

Visitor Profile Analysis Winter 2014

A total of 929 interviews were conducted with visitors in Lee County during the summer months of January, February, and March 2014. 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 916 interviews were conducted with visitors in Lee County during the summer months of January, February, and March 2013. A total sample of this size is considered accurate to plus or minus 3.2 percentage points at the 95% confidence level.

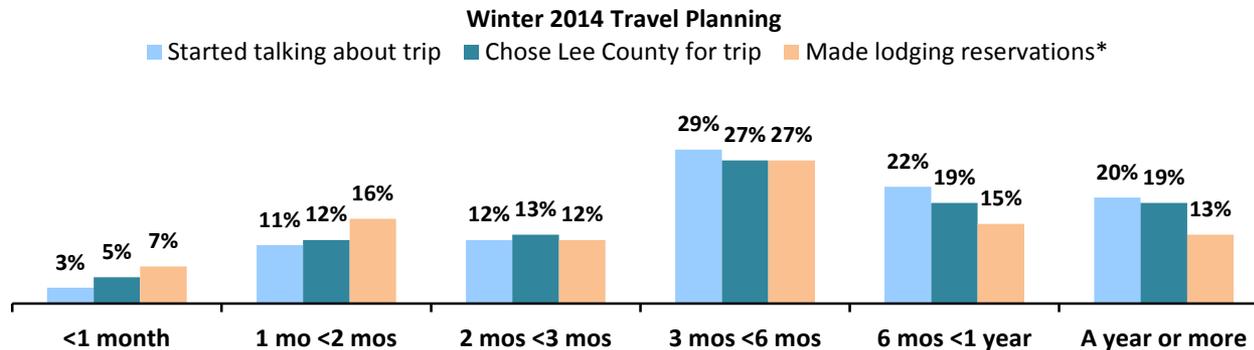
Travel Planning

Winter Season	Started Talking About Trip		Chose Lee County for Trip		Made Lodging Reservations	
	2013 A	2014 B	2013 A	2014 B	2013 A	2014 B
Total Respondents	916	929	916	929	663*	671*
<u>Less than 3 months (NET)</u>	<u>27%</u>	<u>26%</u>	<u>30%</u>	<u>29%</u>	<u>37%</u>	<u>35%</u>
<1 month	3%	3%	4%	5%	5%	7%
1 month - <2 months	10%	11%	12%	12%	15%	16%
2 months - <3 months	14%	12%	14%	13%	17%b	12%
<u>3 months or more (NET)</u>	<u>70%</u>	<u>71%</u>	<u>64%</u>	<u>65%</u>	<u>55%</u>	<u>55%</u>
3 months - <6 months	30%	29%	27%	27%	27%	27%
6 months - <1 year	18%	22%	17%	19%	16%	15%
A year or more	21%	20%	21%	19%	12%	13%
No Lodging Reservations Made	-	-	-	-	6%	7%
No Answer	3%	3%	5%	6%	2%	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		
	2013	2014
Winter Season	A	B
Total Respondents	916	929
<u>Any (NET)</u>	<u>93%</u>	<u>95%</u>
Laptop computer	63%	61%
Desktop computer	51%b	45%
Smartphone (iPhone, Blackberry, etc.)	40%	44%
Tablet (iPad, etc.)	28%	40%a
E-Reader (Nook, Kindle, etc.)	7%b	4%
Other portable device	2%	2%
None of these	6%	5%
No Answer	1%b	<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		
	2013	2014
Winter Season	A	B
Respondents who used a device to plan	854	884
<u>Visited web sites (net)</u>	<u>86%</u>	<u>87%</u>
Airline websites	40%	41%
Search Engines	34%	31%
Hotel websites	27%	26%
Vacation rental websites	-	26%
Booking websites	27%	25%
Trip Advisor	19%	23%
www.FortMyers-Sanibel.com	16%	13%
AAA	10%b	6%
Visit Florida	8%	7%
Facebook	4%	5%
Other	16%b	8%
None/Didn't visit websites	12%	13%
No Answer	1%	<1%

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.

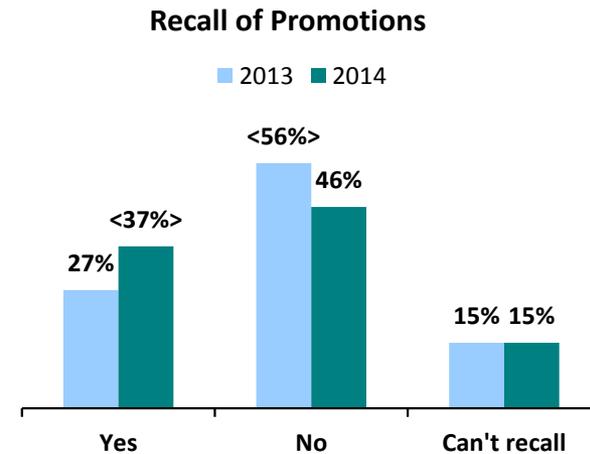
Travel Planning

Travel Information Requested		
	2013	2014
Winter Season	A	B
Total Respondents	916	929
<u>Requested information (NET)</u>	<u>36%^b</u>	<u>30%</u>
<i>Hotel website</i>	18% ^b	14%
<i>Call hotel</i>	9% ^b	6%
<i>VCB website</i>	8%	6%
<i>Visitor Guide</i>	5%	4%
<i>E-Newsletter</i>	1%	1%
<i>Call local Chamber of Commerce</i>	1%	1%
<i>Call VCB</i>	1%	<1%
<i>Magazine Reader Services Card</i>	<1%	1%
<i>Other</i>	11% ^b	7%
<u>None/Did not request information</u>	<u>61%</u>	<u>65%</u>
No Answer	3%	5% ^a

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

Recall of Lee County Promotions		
	2013	2014
Winter Season	A	B
Total Respondents	916	929
Yes	27%	37% ^a
No	56% ^b	46%
Can't Recall	15%	15%

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



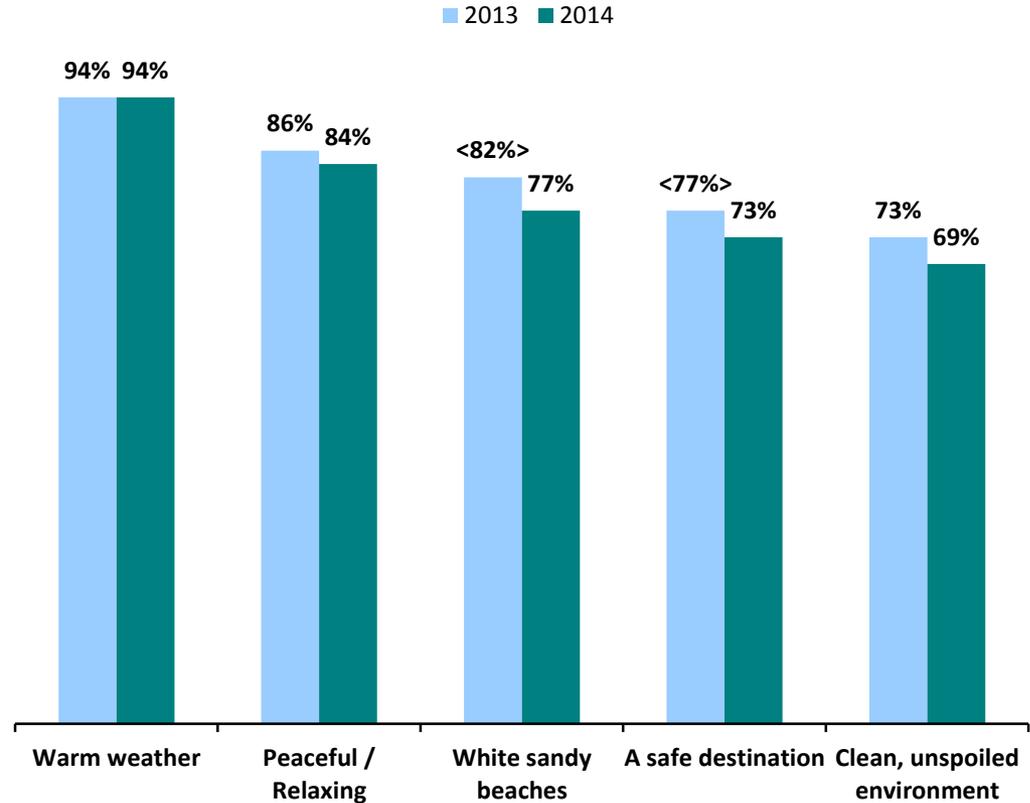
Travel Planning

Travel Decision Influences*		
Winter Season	2013	2014
	A	B
Total Respondents	916	929
Warm weather	94%	94%
Peaceful / Relaxing	86%	84%
White sandy beaches	82% ^b	77%
A safe destination	77% ^b	73%
Clean, unspoiled environment	73%	69%
Convenient location	67%	67%
Plenty to see and do	64%	62%
Good value for the money	63%	59%
Reasonably priced lodging	61% ^b	54%
Affordable dining	56%	53%
Upscale accommodations	53%	53%
A "family" atmosphere	56% ^b	50%

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		
Winter Season	2013	2014
	A	B
Total Respondents	916	929
Fly	65%	68%
Drive a personal vehicle	30% ^b	25%
Drive a rental vehicle	3%	4%
Drive an RV	1%	1%
Travel by bus	-	1%
Other/No Answer	1%	1%

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

Airport Used		
Winter Season	2013	2014
	A	B
Respondents who flew	592	630
SW Florida Int'l (Fort Myers)	86%	87%
Punta Gorda	N/A	4%
Tampa Int'l	5%	3%
Orlando Int'l	3%	2%
Miami Int'l	2%	1%
Ft. Lauderdale Int'l	1%	1%
Sarasota / Bradenton	1%	N/A
West Palm Beach Int'l	<1%	N/A
Other/No Answer	1%	2%

Q2: At which Florida airport did you land?

Frequency of Using SWFL Int'l (Past Year)		
Winter Season	2013	2014
Total Respondents	916	929
<u>One or more trips</u>	<u>57%</u>	<u>57%</u>
1 trip	40%	40%
2 to 3 trips	13%	13%
4 to 5 trips	2%	2%
6 or more trips	1%	2%
None/No Answer	43%	43%

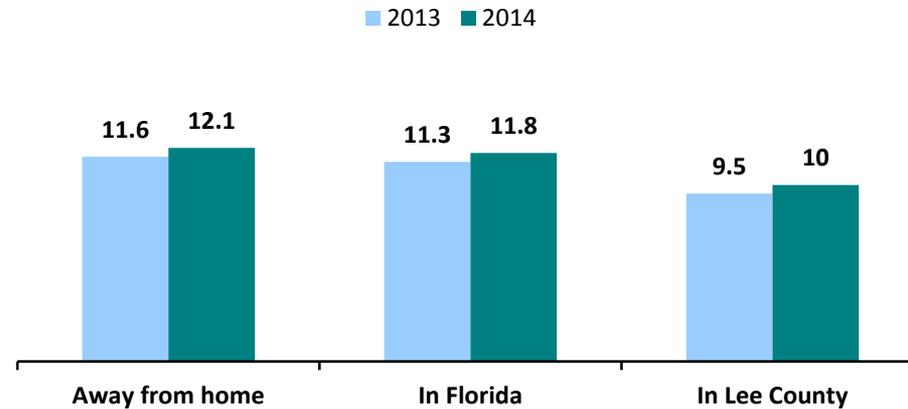
Q40: In the past year, how many trips have you taken where you used Southwest Florida International airport (Fort Myers) for your air travel?

Trip Profile

Trip Length Mean # of Days		
	2013	2014
	A	B
Total Respondents	916	929
Away from home	11.6	12.1
In Florida	11.3	11.8
In Lee County	9.5	10.0

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

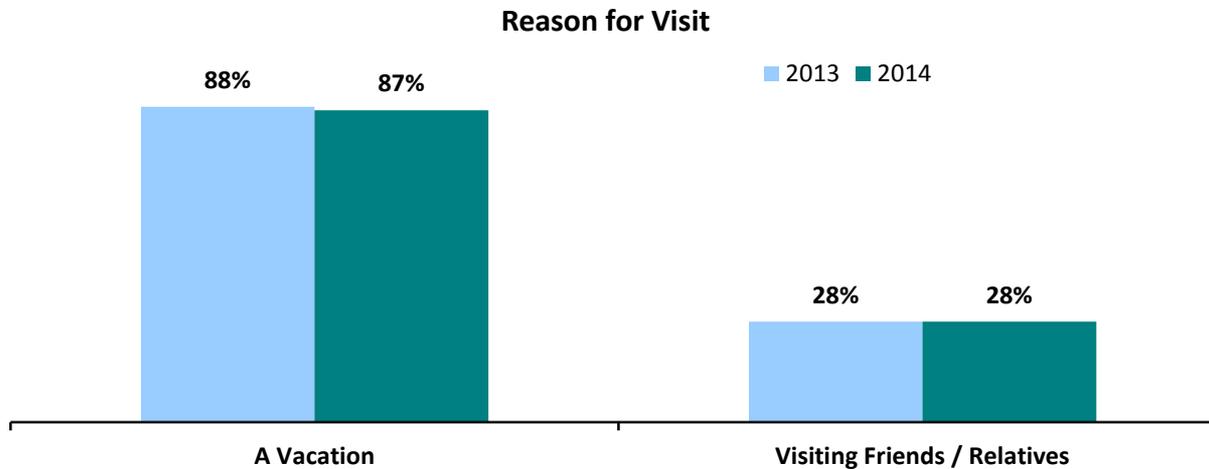
Trip Length (mean # of days)



Trip Profile

Reason(s) for Visit		
Winter Season	2013	2014
	A	B
Total Respondents	916	929
A Vacation	88%	87%
Visiting Friends / Relatives	28%	28%
Sporting Event(s)	5%	4%
Personal Business	2%	2%
Other Business Trip	1%	2%
A Conference / Meeting	1%	1%
A Convention / Trade Show	<1%	1%
Other/No Answer (NET)	2%	2%

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



Trip Profile

First Time Visitors to Lee County								
Winter Season	Total		Florida Residents		Out-of-State Residents		International Visitors	
	2013	2014	2013	2014	2013	2014	2013	2014
	A	B	A	B	A	B	A	B
Total Respondents	916	929	16**	14**	664	694	173	147
First-time visitor	20%	23%	6%	7%	18%	22%a	29%	33%
Repeat visitor	79%	76%	94%	93%	81%	77%	70%	67%
No Answer	1%	1%	N/A	N/A	1%	1%	1%	1%

Q15: Is this your first visit to Lee County?

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

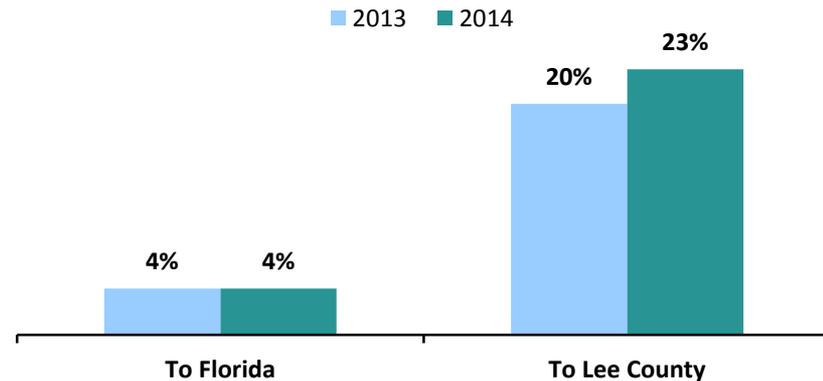
**N/A: Insufficient number of responses for statistical analysis (N<30).

First Time Visitors to Florida		
Winter Season	2013	2014
Total Respondents	916	929
	A	B
Yes, first-time visitor	4%	4%
No	93%	93%
No answer	1%	1%
<i>FL Residents*</i>	2%	1%

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



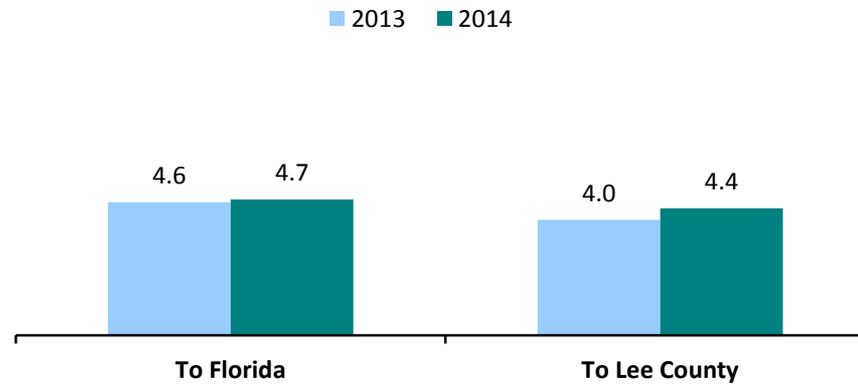
Trip Profile

Previous Visits in Five Years				
Winter Season	Mean # of Visits to Florida		Mean # of Visits to Lee County	
	2013	2014	2013	2014
	A	B	A	B
Base: Repeat Visitors	849 (FL res. Excl)	868 (FL res. Excl)	722	705
Number of visits	4.6	4.7	4.0	4.4

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?

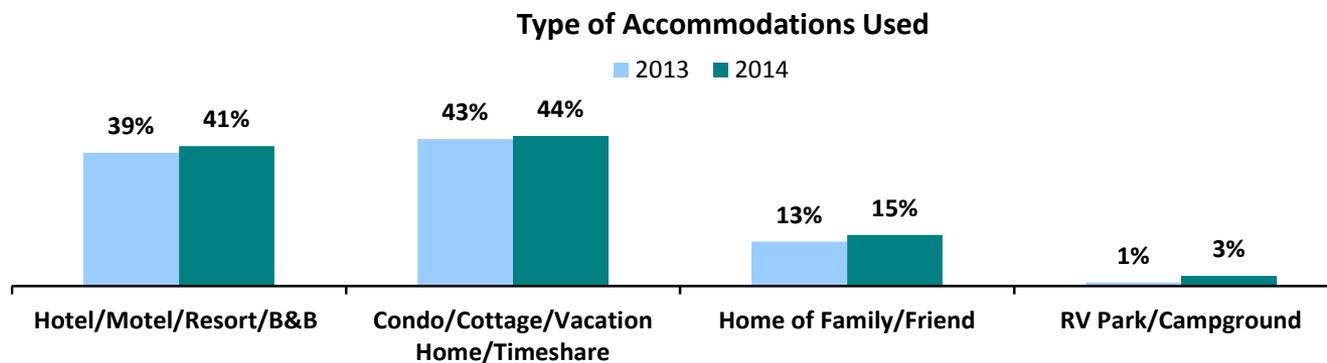
Previous Visits in Five Years



Trip Profile

Type of Accommodations Used		
Winter Season	2013	2014
	A	B
Total Respondents	916	929
<u>Hotel/Motel/Resort/B&B (NET)</u>	<u>39%</u>	<u>41%</u>
At a hotel/motel/historic inn	23%	22%
At a resort	16%	19%
At a Bed and Breakfast	<1%	<1%
<u>Condo/Cottage/Vacation Home/Timeshare (NET)</u>	<u>43%</u>	<u>44%</u>
Rented home/condo	32%	29%
Owned home/condo	8%	7%
Borrowed home/condo	3%	4%
At the home of family or a friend	<u>13%</u>	<u>15%</u>
RV Park/Campground (NET)	<u>1%</u>	<u>3%</u>
Daytripper (No Accommodations)	<u>3%</u>	<u>1%</u>

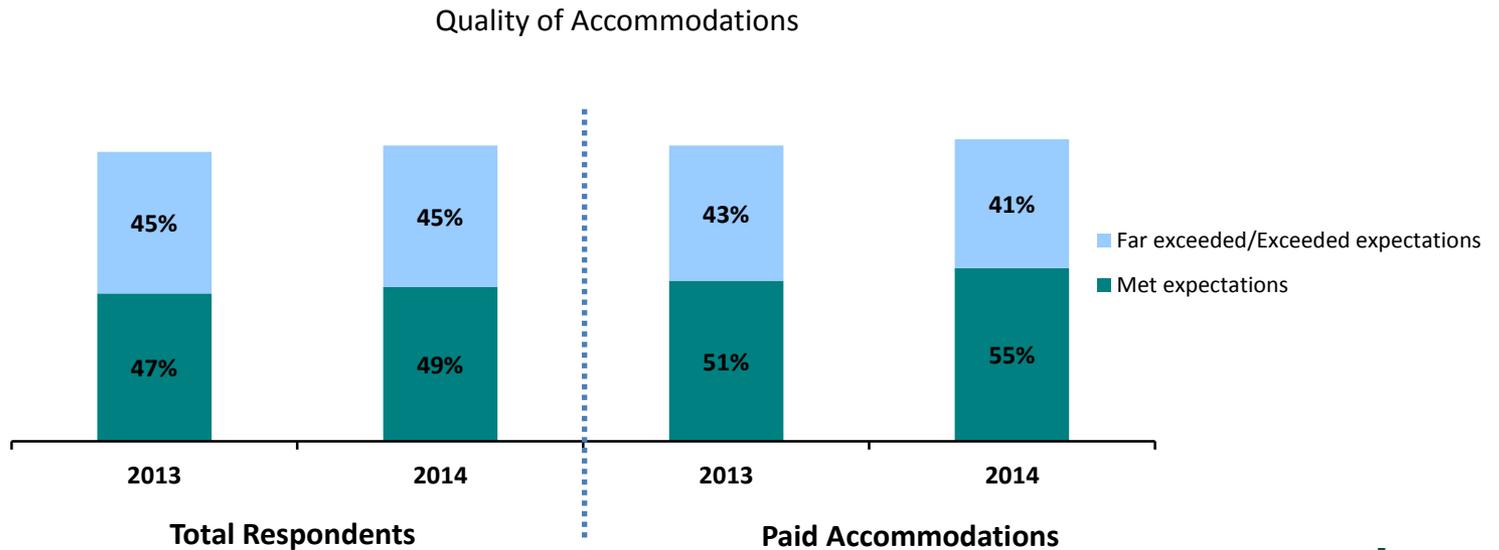
Q20: Are you staying overnight (either last night or tonight):



Trip Profile

Quality of Accommodations				
	Total Respondents		Paid Accommodations	
Winter Season	2013	2014	2013	2014
	A	B	A	B
Respondents	916	929	663	671
Far exceeded/Exceeded expectations	45%	45%	43%	41%
Met your expectations	47%	49%	51%	55%
Did not meet/Far below expectations	3%	2%	3%	3%
No Answer	5%	3%	2%	2%

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



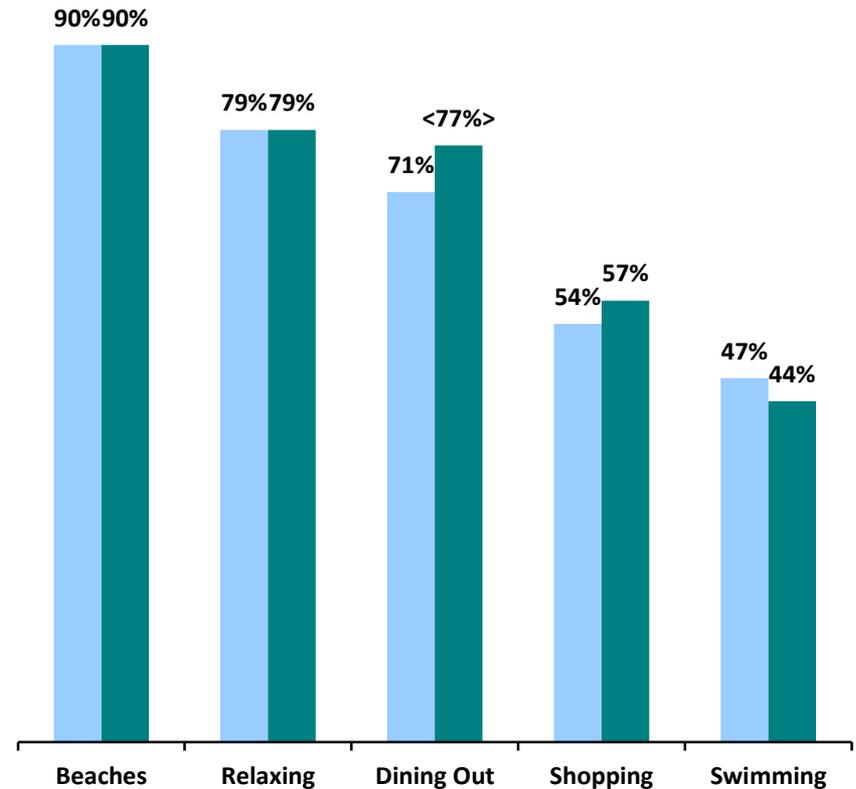
Trip Activities

Activities Enjoyed		
Winter Season	2013	2014
	A	B
Total Respondents	916	929
Beaches	90%	90%
Relaxing	79%	79%
Dining Out	71%	77% ^a
Shopping	54%	57%
Swimming	47%	44%
Sightseeing	38%	37%
Visiting Friends/Relatives	35%	36%
Shelling	38%	34%
Attractions	30%	30%
Watching Wildlife	30% ^b	22%
Bicycle Riding	21%	22%
Exercise / Working Out	20%	18%
Photography	22% ^b	16%
Birdwatching	17%	16%
Golfing	16%	14%
Bars / Nightlife	16%	13%
Fishing	11%	10%
Boating	10%	10%
Sporting Event	9%	9%
Cultural Events	8%	8%
Kayaking / Canoeing	7%	7%
Guided Tour	6%	7%
Miniature Golf	5%	6%
Tennis	3%	4%
Parasailing / Jet Skiing	4%	3%
Scuba Diving / Snorkeling	1%	1%
Other	3%	3%
No Answer	1%	1%

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

Top Activities Enjoyed

■ 2013 ■ 2014

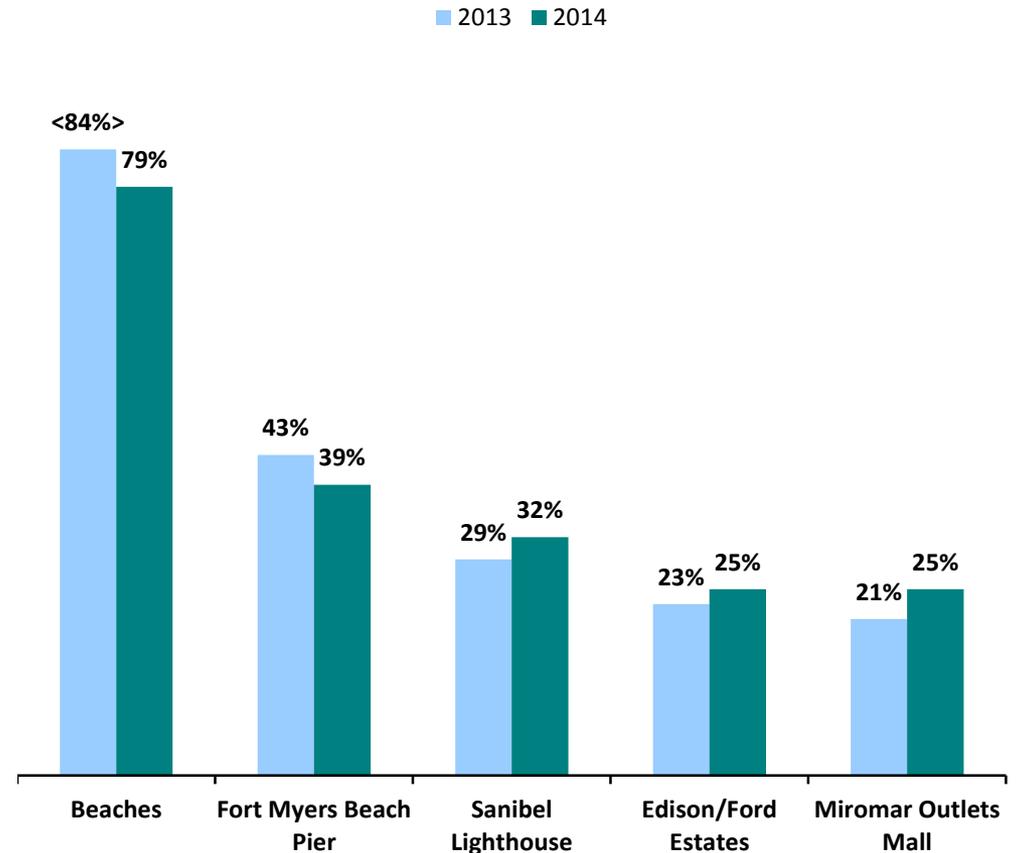


Trip Activities

Attractions Visited		
Winter Season	2013	2014
	A	B
Total Respondents	916	929
Beaches	84% ^b	79%
Fort Myers Beach Pier	43%	39%
Sanibel Lighthouse	29%	32%
Edison/Ford Estates	23%	25%
Miromar Outlets Mall	21%	25%
Tanger Outlet Center	24%	21%
Ding Darling National Wildlife Refuge	22%	20%
Periwinkle Place	16%	15%
Coconut Point Mall	12%	14%
Bell Tower Shops	13%	11%
Shell Factory and Nature Park	9%	11%
Edison Mall	9%	8%
Gulf Coast Town Center	10%	8%
Manatee Park	7%	8%
Bailey-Matthews Shell Museum	4%	5%
Broadway Palm Dinner Theater	3%	2%
Barbara B. Mann Performing Arts Hall	2%	2%
Babcock Wilderness Adventures	1%	1%
Other	9%	6%
None/No Answer (NET)	4%	4%

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

Top Attractions Visited



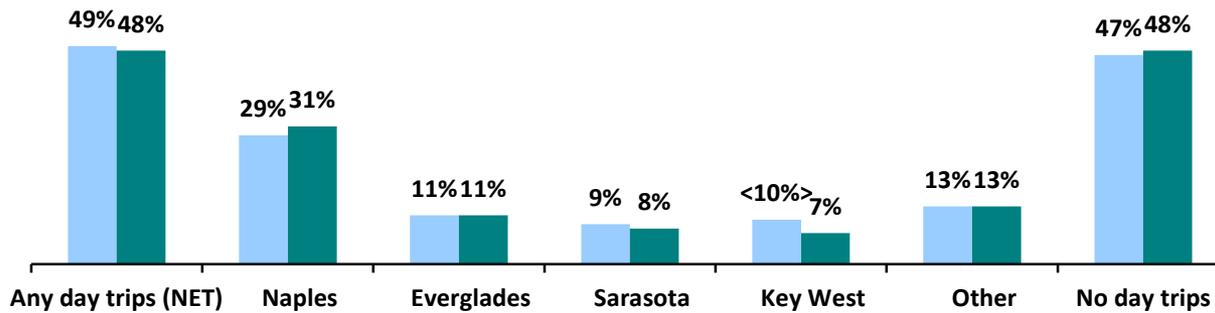
Trip Activities

Day Trips Outside Lee County		
Winter Season	2013	2014
	A	B
Total Respondents	916	929
<u>Any day trips (NET)</u>	<u>49%</u>	<u>48%</u>
<i>Naples</i>	29%	31%
<i>Everglades</i>	11%	11%
<i>Sarasota</i>	9%	8%
<i>Key West</i>	10% ^b	7%
<i>Other</i>	13%	13%
<u>No day trips</u>	<u>47%</u>	<u>48%</u>
No Answer	11%	12%

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

Day Trips Outside Lee County

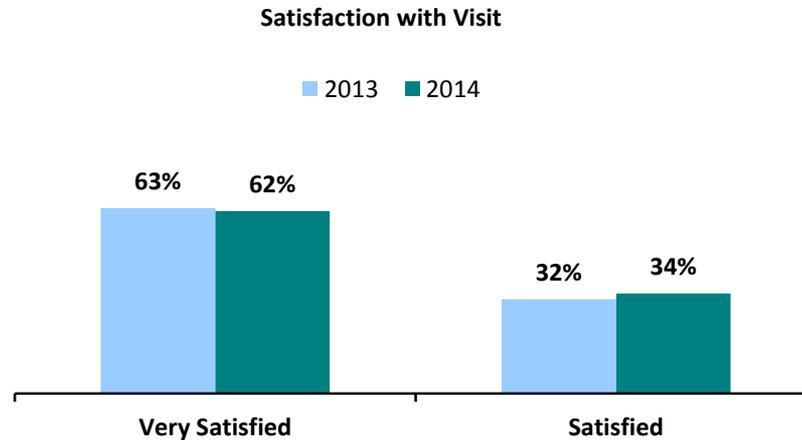
■ 2013 ■ 2014



Lee County Experience

Satisfaction with Visit		
Winter Season	2013	2014
	A	B
Total Respondents	916	929
<u>Very Satisfied/Satisfied</u>	<u>95%</u>	<u>95%</u>
<i>Very Satisfied</i>	63%	62%
<i>Satisfied</i>	32%	34%
Neither	1%	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

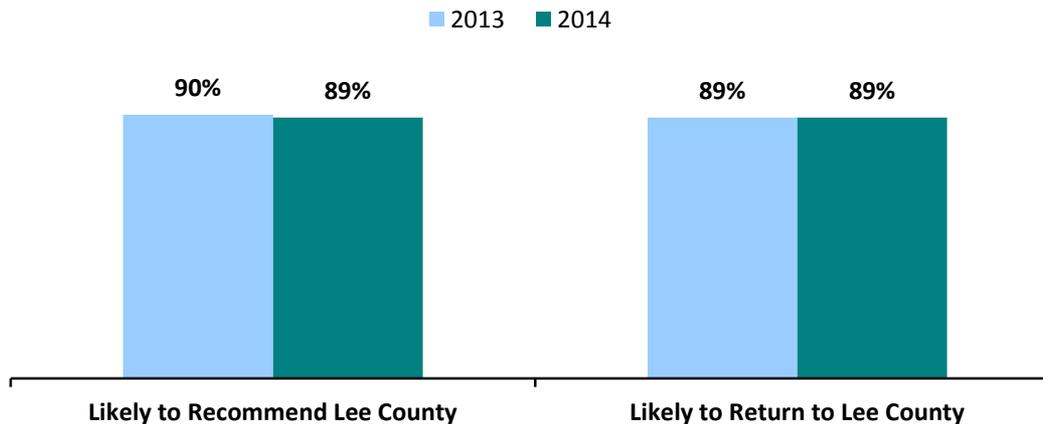
Likelihood to Recommend/Return to Lee County		
Winter Season	2013	2014
	A	B
Total Respondents	916	929
Likely to Recommend Lee County	90%	89%
Likely to Return to Lee County	89%	89%
Base: Total Respondents Planning to Return	819	827
Likely to Return Next Year	65%	60%

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?

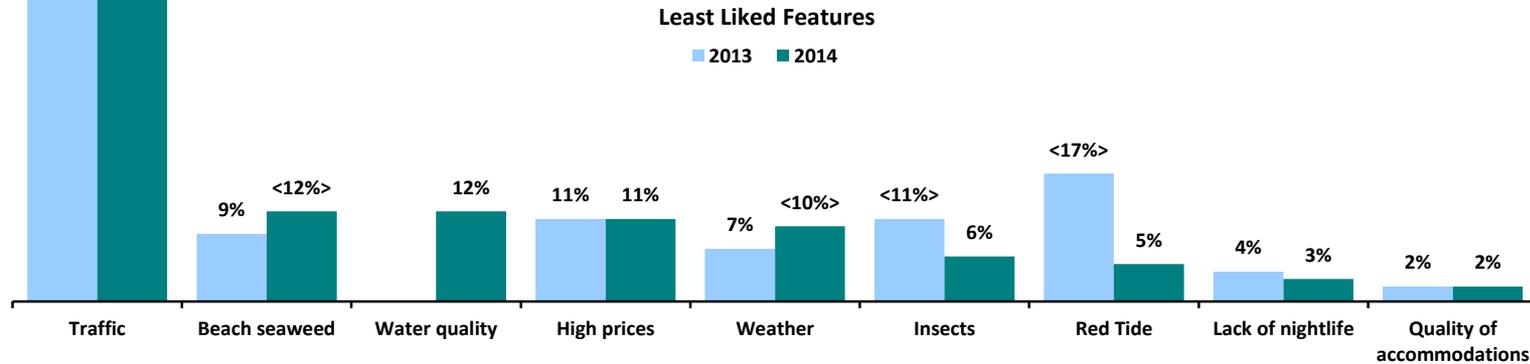
Likelihood to Recommend/Return to Lee County (Responded "Yes")



Trip Activities

Least Liked Features		
Winter Season	2013	2014
	A	B
Total Respondents	916	929
Traffic	47%	50%
Beach seaweed	9%	12%a
Water quality	N/A	12%
High prices	11%	11%
Weather	7%	10%a
Insects	11%b	6%
Red Tide	17%b	5%
Lack of nightlife	4%	3%
Quality of accommodations	2%	2%
Other	5%	5%
Nothing/No answer (NET)	28%	25%

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

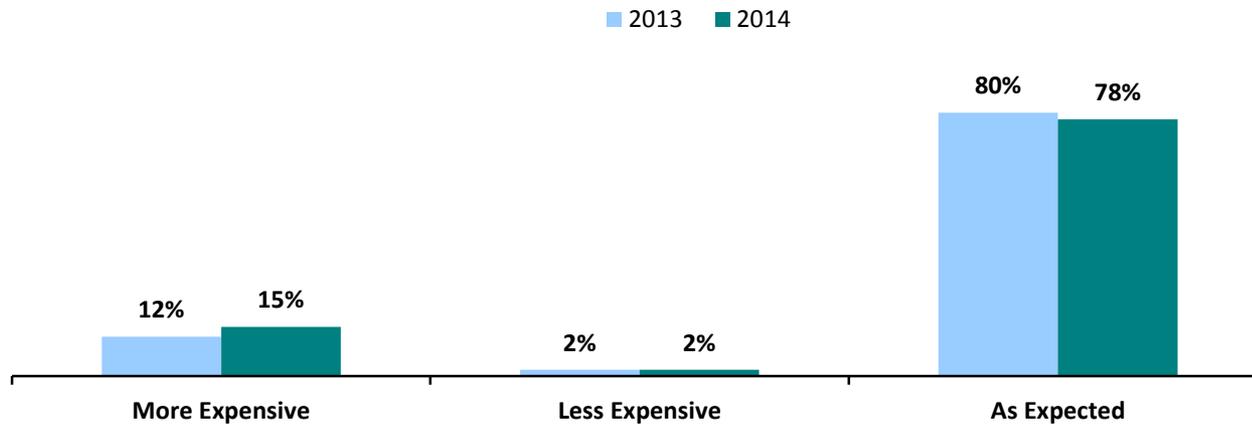


Trip Activities

Perception of Lee County as Expensive		
Winter Season	2013	2014
	A	B
Total Respondents	916	929
More Expensive	12%	15%
Less Expensive	2%	2%
As Expected	80%	78%
Don't know/No Answer (NET)	6%	5%

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		
Winter Season	2013	2014
	A	B
Total Respondents	916	929
Age of respondent (mean)	55.5	57.0a
Annual household income (mean)	\$106,760	\$107,587
Martial Status		
Married	74%	77%
Single	10%	9%
Vacations per year (mean)	2.7	2.9
Short getaways per year (mean)	4.2	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		
Winter Season	2013	2014
	A	B
Total Respondents	916	929
Couple	51%	51%
Family	26%	22%
Group of couples/friends	12%	14%
Single	8%	8%
Mean travel party size	2.7	2.8
Mean adults in travel party	2.5	2.6

Q17: On this trip, are you traveling:

Q18: Including yourself, how many people are in your immediate travel party?

Travel Parties with Children		
Winter Season	2013	2014
	A	B
Total Respondents	916	929
<u>Traveling with any Children (net)</u>	<u>15%</u>	<u>14%</u>
Any younger than 6	6%	6%
Any ages 6-11	6%	6%
Any 12-17 years old	6%	6%
No Children	85%	86%

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		
Winter Season	2013	2014	2013	2014	% Change
Paid Accommodations	52%	55%	732,267	777,539	6.2%
Friends/Relatives	48%	45%	666,051	642,459	-3.5%
Total Visitation			1,398,318	1,419,998	1.6%

Visitor Origin (Paid Accommodation Guests)					
Winter Season	%		Visitor Estimates		
Country of Origin	2013	2014	2013	2014	% Change
United States	79%	84%	582,058	654,709	12.5%
Canada	9%	7%	64,060	52,145	-18.6%
Germany	5%	3%	37,552	20,858	-44.5%
Scandinavia	2%	2%	13,254	16,223	22.4%
UK	2%	1%	16,567	10,429	-37.1%
BeNeLux	<1%	1%	3,313	6,953	109.8%
Switzerland	<1%	<1%	3,313	2,318	-30.1%
France	-	<1%	-	2,318	-
Latin America	<1%	<1%	1,104	1,159	4.9%
Austria	<1%	-	4,418	-	-
Ireland	<1%	-	2,209	-	-
Other International	-	1%	-	6,953	-
No Answer	1%	1%	4,418	3,476	-21.3%

U.S. Region of Origin	2013	2014	2013	2014	% Change
Florida	2%	2%	8,836	12,747	44.3%
South (including Florida)	12%	13%	67,373	82,273	22.1%
Midwest	57%	55%	331,343	362,697	9.5%
Northeast	23%	20%	133,641	133,259	-0.3%
West	2%	3%	8,836	17,382	96.7%
No Answer	7%	9%	40,866	59,098	44.6%

Winter 2014 Top DMAs (Paid Accommodations)		
Minneapolis-Saint Paul	10%	62,574
New York	5%	34,763
Indianapolis	5%	32,446
Chicago	5%	31,287
Boston	4%	28,969
Cleveland-Akron	3%	19,699
Detroit	2%	13,905
Philadelphia	2%	13,905
Saint Louis	2%	13,905
Cincinnati	2%	12,747

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

Occupancy Data Analysis Winter 2014

For the 2014 winter season, property managers were interviewed in April 2014 to provide data for each specific month of the season (January, February, and March 2014).

For the 2013 winter season, property managers were interviewed in February 2013, March 2013, and April 2013 to provide data for the preceding month.

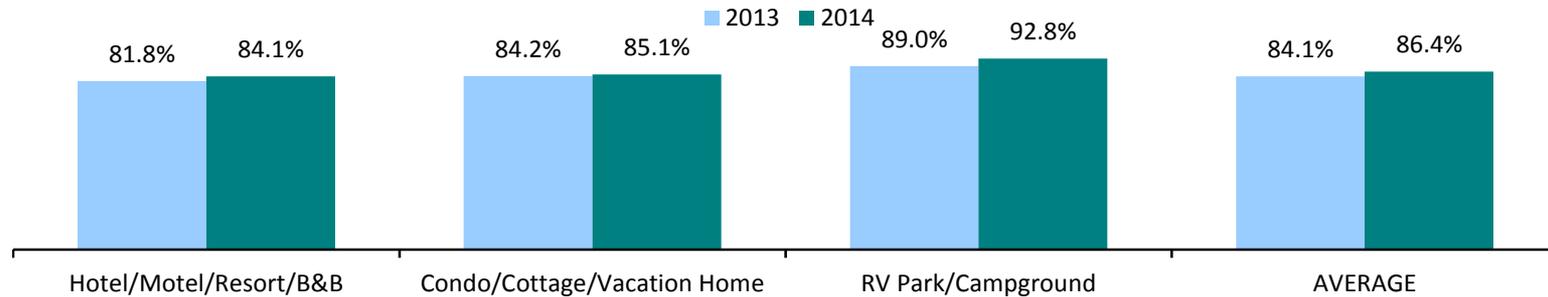
Occupancy/Daily Rates

	Average Occupancy Rate			Average Daily Rate			RevPAR		
Winter Season	2013	2014	% Change	2013	2014	% Change	2013	2014	% Change
Hotel/Motel/Resort/B&B	81.8%	84.1%	2.8%	\$173.79	\$186.29	7.2%	\$142.23	\$156.70	10.2%
Condo/Cottage/Vacation Home	84.2%	85.1%	1.1%	\$207.15	\$238.48	15.1%	\$174.36	\$202.95	16.4%
RV Park/Campground	89.0%	92.8%	4.2%	\$55.73	\$59.97	7.6%	\$49.62	\$55.66	12.2%
AVERAGE	84.1%	86.4%	2.7%	\$151.62	\$165.47	9.1%	\$127.54	\$142.94	12.1%

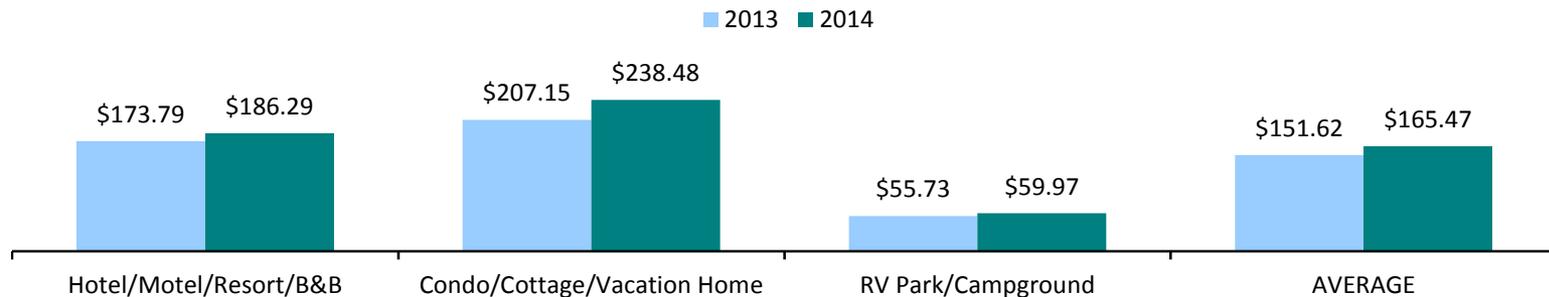
Q16: What was your overall average occupancy rate for the month of [January/February/March]?

Q17: What was your average daily rate (ADR) in [January/February/March]?

Average Occupancy Rate



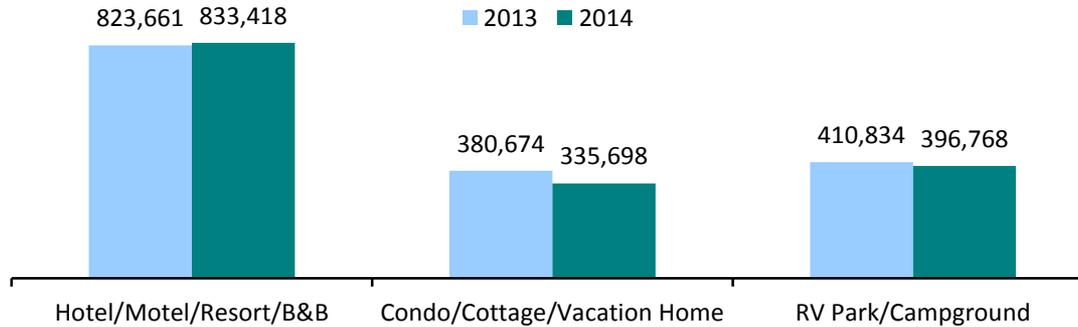
Average Daily Rate



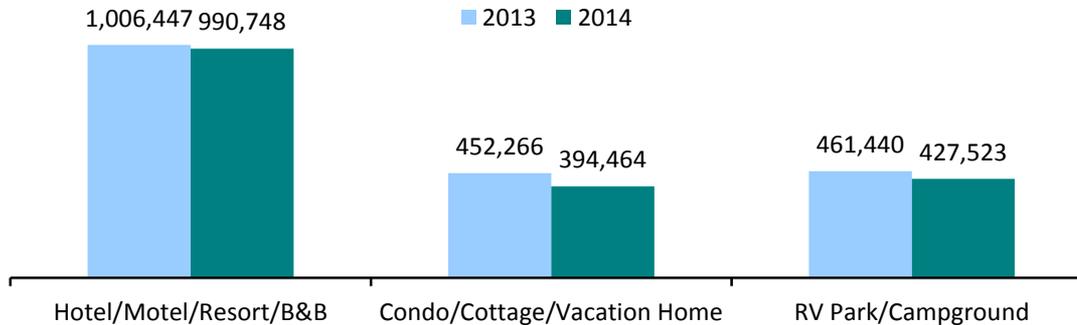
Room/Unit/Site Nights

Winter Season	Occupied Room Nights			Available Room Nights		
	2013	2014	% Change	2013	2014	% Change
Hotel/Motel/Resort/B&B	823,661	833,418	1.2%	1,006,447	990,748	-1.6%
Condo/Cottage/Vacation Home	380,674	335,698	-11.8%	452,266	394,464	-12.8%
RV Park/Campground	410,834	396,768	-3.4%	461,440	427,523	-7.4%
Total	1,615,169	1,565,885	-3.1%	1,920,153	1,812,735	-5.6%

Occupied Room Nights



Available Room Nights

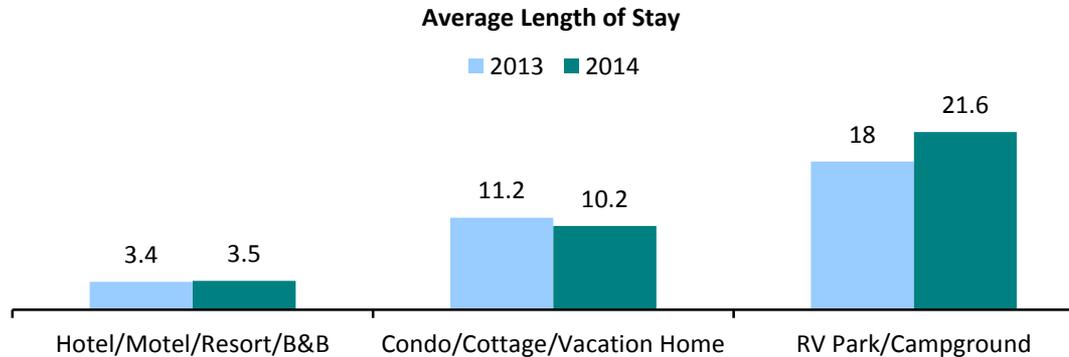
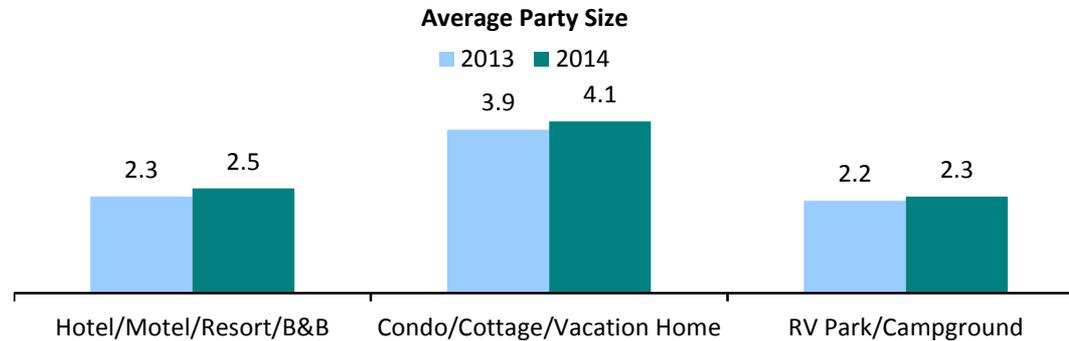


Average Party Size and Length of Stay

Winter Season	Average Party Size			Average Length of Stay		
	2013	2014	% Change	2013	2014	% Change
Hotel/Motel/Resort/B&B	2.3	2.5	9.2%	3.4	3.5	1.3%
Condo/Cottage/Vacation Home	3.9	4.1	4.7%	11.2	10.2	-8.7%
RV Park/Campground	2.2	2.3	7.4%	18.0	21.6	19.7%
Average	2.6	2.8	6.0%	5.8	5.6	-3.2%

Q18: What was your average number of guests per room/site/unit in [January/February/March]?

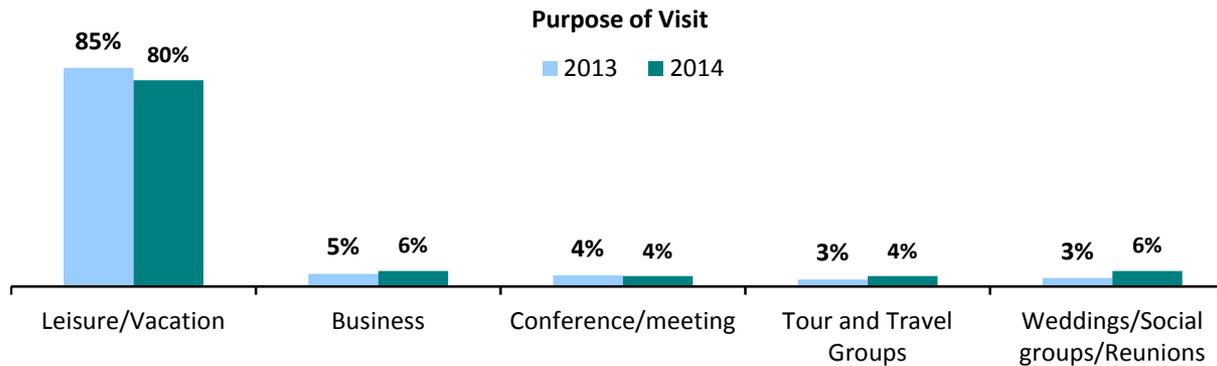
Q19: What was the average length of stay (in nights) of your guests in [January/February/March]?



Lodging Management Estimates

Guest Profile		
Winter Season	2013	2014
	A	B
Total Number of Responses	95	104
<u>Purpose of Visit</u>		
Leisure/Vacation	85%	80%
Business	5%	6%
Conference/meeting	4%	4%
Tour and Travel Groups	3%	4%
Weddings/Social groups/Reunions (net)	3%	6%

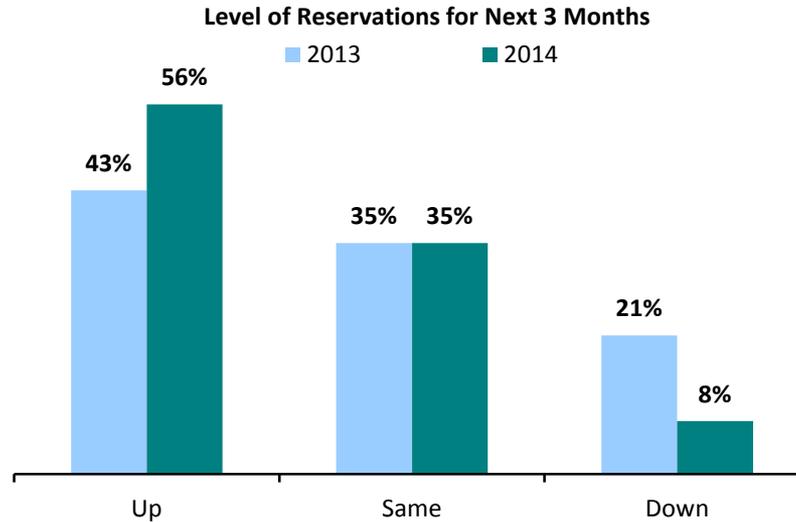
Q22: What percent of your [January/February/March] room/site/unit occupancy do you estimate was generated by:



Occupancy Barometer

Level of Reservations for Next 3 Months Compared to Last Year		
Winter Season	2013	2014
	A	B
Total Respondents	101	111
<u>Up/Same (net)</u>	<u>77%</u>	<u>91%^a</u>
Up	43%	56%
Same	35%	35%
Down	21%	8%

Q24: Compared to April, June, and July of [prior year], is your property's total level of reservations up, the same or down for April, June, and July of [current year]?



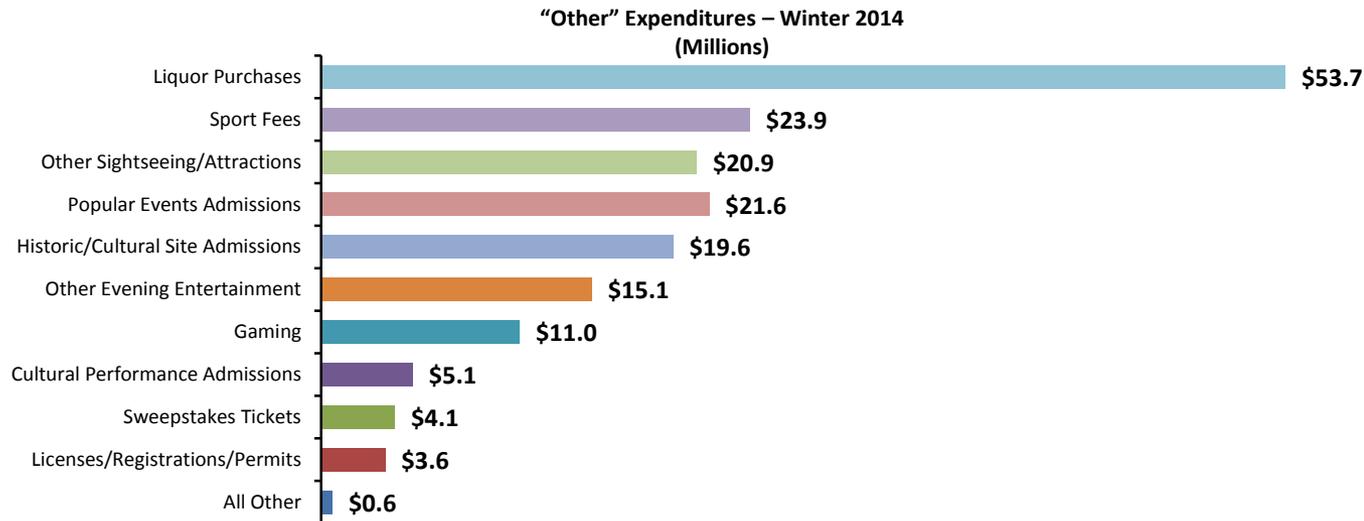
***Note: Only includes those property managers interviewed in April 2013 for direct comparability to those interviewed in April 2014.**

Economic Impact Analysis
Winter 2014

Total Visitor Expenditures by Spending Category

TOTAL EXPENDITURES			
Winter Season	2013	2014	% Change
<u>TOTAL</u>	<u>\$1,050,048,213</u>	<u>\$1,074,709,807</u>	<u>2.3%</u>
Food and Beverages	\$268,197,542	\$269,927,494	0.6%
Shopping	\$261,154,408	\$264,582,635	1.3%
Lodging Accommodations	\$244,896,197	\$259,104,943	5.8%
Ground Transportation	\$94,764,414	\$101,896,278	7.5%
Other	\$181,035,652	\$179,198,457	-1.0%

(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

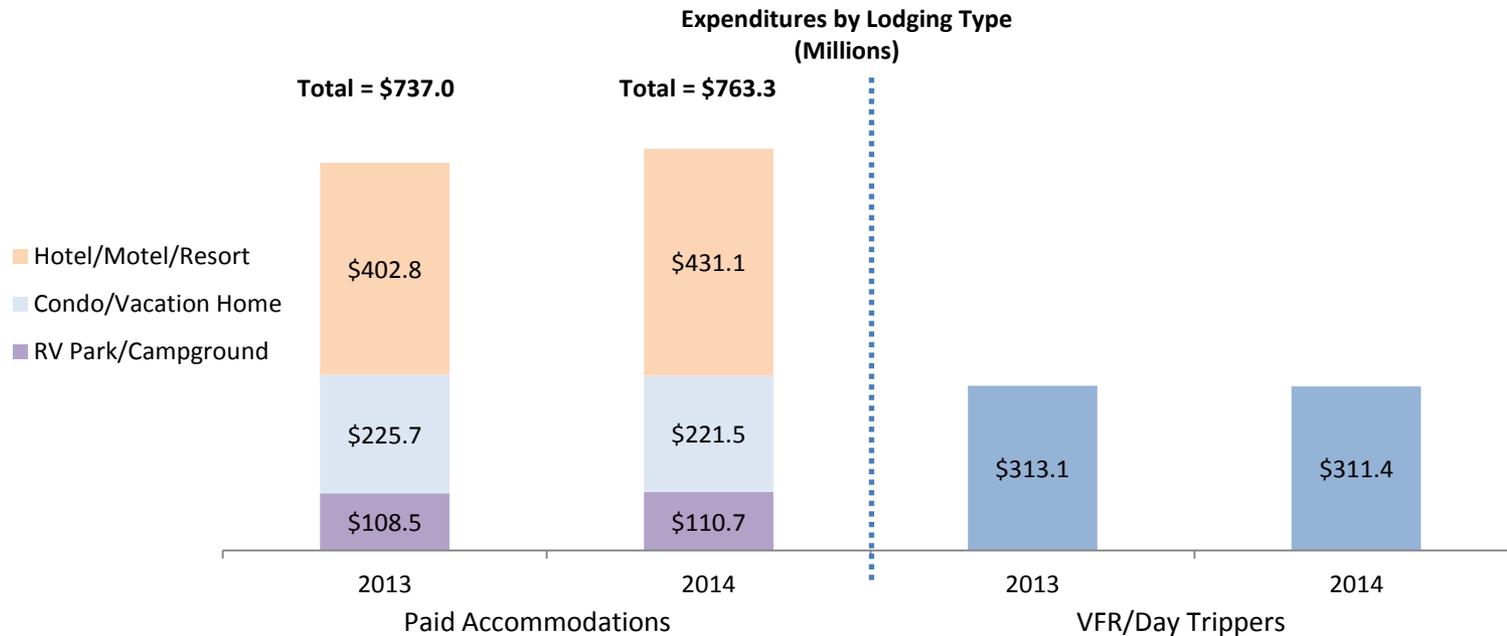
TOTAL EXPENDITURES						
	Staying Paid Accommodations			Visiting Friends and Relatives/Day Trippers		
Winter Season	2013	2014	% Change	2013	2014	% Change
TOTAL	\$736,972,483	\$763,319,329	3.6%	\$313,075,730	\$311,390,478	-0.5%
Lodging Accommodations	\$244,896,197	\$259,104,943	5.8%	\$0	\$0	-
Food and Beverages	\$162,282,873	\$166,074,195	2.3%	\$105,914,669	\$103,853,299	-1.9%
Shopping	\$156,231,585	\$159,255,385	1.9%	\$104,922,823	\$105,327,250	0.4%
Ground Transportation	\$62,565,806	\$67,821,532	8.4%	\$32,198,608	\$34,074,746	5.8%
Other	\$110,996,022	\$111,063,274	0.1%	\$70,039,630	\$68,135,183	-2.7%

“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					
Winter Season	2013	2014	% Change	2013	2014
<u>TOTAL</u>	<u>\$1,050,048,213</u>	<u>\$1,074,709,807</u>	<u>2.3%</u>	<u>100%</u>	<u>100%</u>
Visiting Friends & Relatives/Day Trippers	\$313,075,730	\$311,390,478	-0.5%	30%	29%
<u>Paid Accommodations</u>	<u>\$736,972,483</u>	<u>\$763,319,329</u>	<u>3.6%</u>	<u>70%</u>	<u>71%</u>
<i>Hotel/Motel/Resort/B&B</i>	<i>\$402,763,469</i>	<i>\$431,142,538</i>	<i>7.0%</i>	<i>38%</i>	<i>40%</i>
<i>Condo/Cottage/Vacation Home</i>	<i>\$225,747,868</i>	<i>\$221,506,571</i>	<i>-1.9%</i>	<i>21%</i>	<i>21%</i>
<i>RV Park/Campground</i>	<i>\$108,461,146</i>	<i>\$110,670,220</i>	<i>2.0%</i>	<i>10%</i>	<i>10%</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.

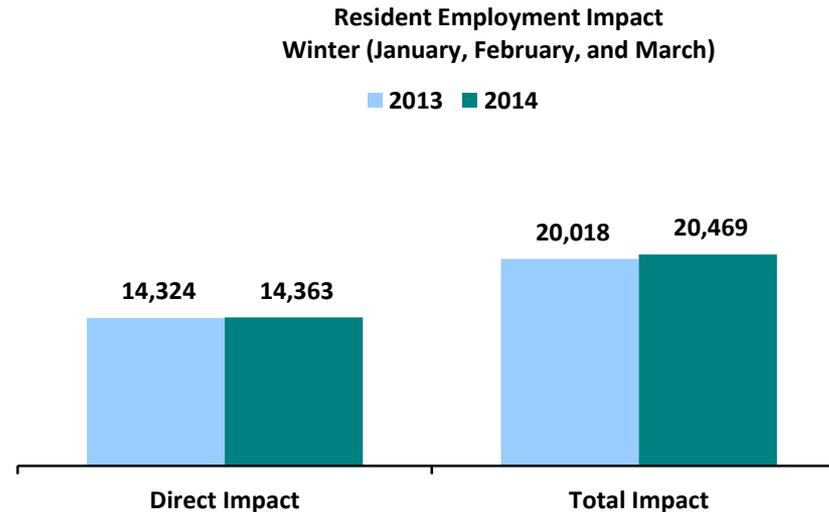
Impact on Jobs for Lee County Residents

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.).



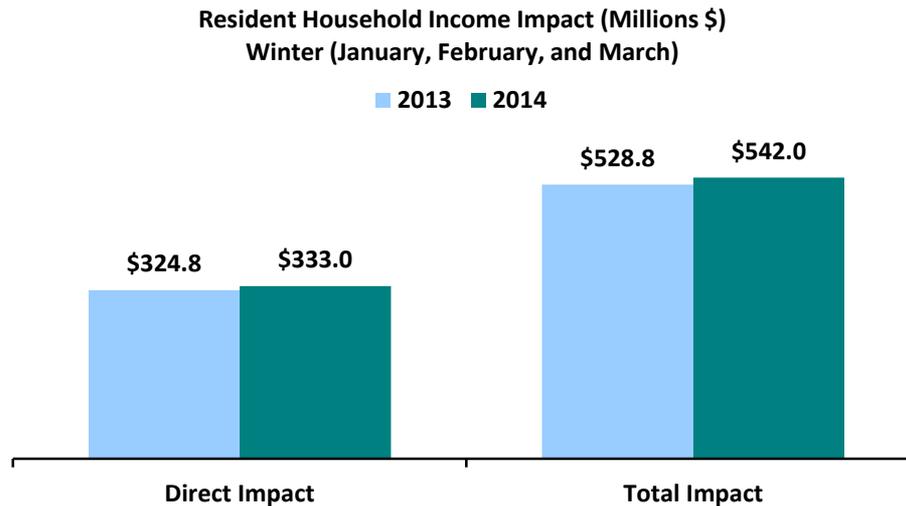
Impact on Household Income for Lee County Residents

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.

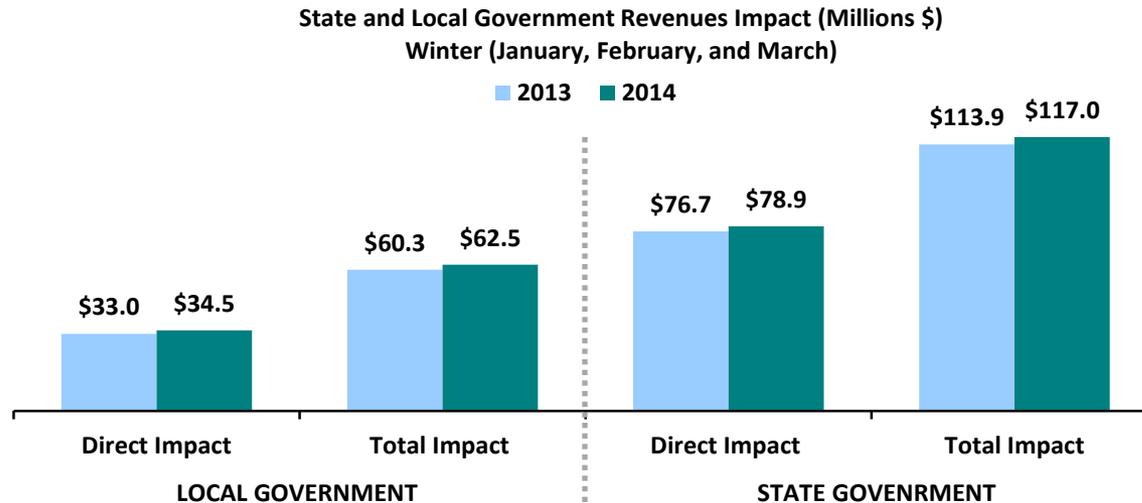
The gross government revenues accruing to governments as a result of producing the output purchased with visitor expenditures is the government revenue impact.

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
Winter 2014

January 2014 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
RSW	RSW Airport	1/6/14	27
Fort Myers	Edison Estates	1/9/14	23
RSW	RSW Airport	1/11/14	33
Fort Myers Beach	Estero Island Beach Club	1/13/14	10
Fort Myers Beach	Diamond Head	1/13/14	10
Fort Myers Beach	Neptune Inn	1/13/14	10
Fort Myers Beach	Lani Kai	1/13/14	5
Sanibel	Surfside	1/14/14	5
Sanibel	Holiday Inn	1/14/14	6
Sanibel	Sundial Resort	1/14/14	6
Fort Myers	Centennial Park	1/15/14	4
Fort Myers Beach	Pink Shell Resort	1/20/14	10
Fort Myers Beach	Windward Passage	1/20/14	10
Fort Myers Beach	Best Western	1/20/14	10
North Fort Meyers	Shell Factory	1/20/14	13
Fort Myers	Edison Estates	1/21/14	24
Bonita Springs	Bonita Beach	1/23/14	24
Cape Coral	Cape Coral Yatch Club	1/23/14	6
Sanibel	Light House Beach	1/26/14	15
Sanibel	Periwinkle Camp Ground	1/26/14	5
Sanibel	Sanibel Beach Club	1/26/14	5
Estero	Miromar Outlets	1/27/14	16
Sanibel	Holiday Inn	1/28/14	8
Sanibel	Loggerhead Cay	1/28/14	10
Sanibel	Coquina Beach	1/28/14	9
Total			304

February 2014 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
RSW	RSW Airport	2/1/14	34
Bonita Springs	Bonita Beach	2/4/14	20
Fort Meyers Beach	Times Square	2/7/14	25
Fort Meyers Beach	Neptune Inn	2/7/14	10
Fort Meyers Beach	Diamond Head	2/7/14	10
Sanibel	Holiday Inn	2/10/14	10
Sanibel	Sanibel Siesta	2/10/14	5
Sanibel	Compass Point	2/10/14	5
Sanibel	Sundial Resort	2/10/14	10
Sanibel	Light House Beach	2/10/14	9
North Fort Meyers	Shell Factory	2/12/14	9
Fort Myers	Edison Estates	2/14/14	25
RSW	RSW Airport	2/15/14	28
Fort Meyers Beach	Lani Kai	2/21/14	5
Fort Meyers Beach	Best Western	2/21/14	10
Fort Meyers Beach	Estero Island Beach Club	2/21/14	10
Estero	Miromar Outlets	2/21/14	20
Fort Myers	Centennial Park	2/22/14	6
Sanibel	Sanibel Cottages	2/24/14	6
Sanibel	Casa Ybel	2/24/14	10
Sanibel	Pointe Santo	2/24/14	10
Fort Myers	Edison Estates	2/25/14	23
Cape Coral	Cape Coral Yacht Club	2/26/14	9
Total			309

March 2014 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
RSW	RSW Airport	3/1/14	30
Bonita Springs	Bonita Beach	3/3/14	25
North Fort Meyers	Shell Factory	3/5/14	8
Fort Meyers Beach	Neptune Inn	3/7/14	10
Fort Meyers Beach	Windward Passage	3/7/14	10
Fort Meyers Beach	Pink Shell Resort	3/7/14	10
Sanibel	Loggerhead Cay	3/10/14	10
Sanibel	Coquina Beach	3/10/14	10
Sanibel	Sanibel Surfside	3/10/14	5
Sanibel	Holiday Inn	3/10/14	11
Fort Myers	Hammond Stadium	3/13/14	20
Fort Myers	Jet Blue Park	3/17/14	20
Fort Myers	Edison Estates	3/19/14	23
Fort Meyers Beach	Diamond Head	3/21/14	10
Fort Meyers Beach	Estero Beach Club	3/21/14	10
Fort Meyers Beach	Times Square Area	3/21/14	20
RSW	RSW Airport	3/22/14	30
Sanibel	Casa Ybel	3/24/14	7
Sanibel	Compass Point	3/25/14	5
Sanibel	Sundial	3/25/14	10
Sanibel	Pointe Santo	3/25/14	10
Estero	Miromar Outlets	3/31/14	22
Total			316

Occupancy Interviewing Statistics

Interviews were conducted during the first two weeks of April 2014 to gather data for January, February, and March 2014 lodging activity. Information was provided by 122 Lee County lodging properties.

Lodging Type	Winter 2014 Number of Interviews
Hotel/Motel/Resort/B&Bs	74
Condo/Cottage/Vacation Home/Timeshare	30
RV Park/Campground	18
Total	122