



*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 2015 Visitor Profile and Occupancy Analysis

November 12, 2015

Prepared for:

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

Prepared by:

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Executive Summary

Summer 2015

Throughout this report, statistically significant differences between responses for 2014 and 2015 at the 95% confidence level are noted with an A,B lettering system.

For example:

2014 A	2015 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 summer 2015, Lee County hosted approximately 728,000 visitors staying in paid accommodations. An additional 375,000 stayed with friends or relatives, for a total of 1.1 million visitors.

- Summer 2015 visitation among paid accommodations guests was up 5% from 2014, but visitation among those staying with friends or relatives dropped 7.2%. As a result, Lee County saw very little change in total visitation versus summer 2014.

Estimated Visitation	Summer 2014	Summer 2015	% Change
Paid Accommodations	693,277	728,080	5.0%
Friends/Relatives	404,232	375,150	-7.2%
Total Visitation	1,097,509	1,103,230	0.5%

Visitor Expenditures

- Summer 2015 visitors spent an estimated \$497.9 million during their stay in Lee County, a 3.9% increase from last summer (\$479.0 million).

- Expenditures among summer 2015 paid accommodations guests amounted to \$333.7 million (67% of the total). Visitors staying with friends or relatives contributed the remaining \$164.2 million. Spending among summer season paid accommodations guests increased 8% year-over-year, while Lee County saw a modest decline among the VFR traveler segment (-3.5%).

Estimated Expenditures	Summer 2014	Summer 2015	% Change
Paid Accommodations	\$308,889,274	\$333,721,725	8.0%
Friends/Relatives	\$170,156,393	\$164,224,126	-3.5%
Total Expenditures	\$479,045,667	\$497,945,851	3.9%

Note: Summer season refers to the period including July, August, and September when referenced throughout this report.

Visitor Origin

- Similar to last year, seven in ten summer 2015 visitors staying in paid accommodations reside within the United States (68%). The top international feeder market was Germany (13%), followed by the UK (8%) and Canada (4%).
- Nearly equal numbers of domestic paid accommodations visitors came from the South (39%) and Midwest (38%) regions. Guests from the Northeast and West were far fewer in numbers.
- New York was the top domestic feeder market for the Lee County lodging industry during summer 2015, but Indianapolis and Miami were a close second and third.

Summer 2015 Top DMAs (Paid Accommodations)

New York	6%	29,932
Indianapolis	5%	26,411
Miami-Fort Lauderdale	5%	24,650
Chicago	4%	21,129
Tampa-Saint Petersburg (Sarasota)	4%	19,368
Atlanta	4%	19,368
Cincinnati	4%	17,607
Cleveland-Akron (Canton)	3%	15,846
Boston (Manchester, NH)	3%	15,846
Kansas City	3%	15,846
Pittsburgh	3%	14,086
Columbus, OH	3%	14,086
Orlando-Daytona Beach-Melbourne	3%	14,086

Visitors Staying in Paid Accommodations

Summer Season	%		Visitor Estimates		% Change
	2014	2015	2014	2015	
Country of Origin					
United States	69%	68%	476,000	492,999	3.6%
Germany	12%	13%	80,380	95,376	18.7%
UK	7%	8%	45,214	59,106	30.7%
Canada	5%	4%	35,166	25,523	-27.4%
Scandinavia	2%	2%	12,559	14,777	17.7%
Switzerland	1%	2%	10,047	12,090	20.3%
BeNeLux	2%	1%	12,559	6,717	-46.5%
France	1%	1%	7,536	6,717	-10.9%
Austria	1%	<1%	3,768	2,687	-28.7%
Latin America	1%	1%	3,768	6,717	78.3%
Ireland	<1%	-	1,256	-	-
Other International	1%	1%	5,024	5,373	7.0%

Visitors Staying in Paid Accommodations

Summer Season	%		Visitor Estimates		% Change
	2014	2015	2014	2015	
U.S. Region of Origin					
Florida	16%	16%	74,573	79,232	6.2%
South (including Florida)	33%	39%	155,493	191,917	23.4%
Midwest	36%	38%	169,773	184,875	8.9%
Northeast	29%	20%	138,040	98,600	-28.6%
West	3%	4%	12,693	17,607	38.7%

Note: The percentage of visitors by origin market is based on data collected from visitors in the Visitor Profile Survey. Respondents who did not answer the area of residence questions are excluded when calculating the 2015 percentages.

Trip Planning

- The majority of summer 2015 visitors planned their Lee County trip well ahead of their arrival. Seven in ten started talking about their Lee County trip *three or more months* in advance, and six in ten chose the destination within that timeframe. Among those staying in paid accommodations, over half made their lodging reservations within that window as well.
 - 71% started talking about trip (vs. 71% in 2014)
 - 64% chose Lee County for trip (vs. 64% in 2014)
 - 57% made lodging reservation (vs. 54% in 2014)
- Nine in ten summer visitors claimed to have visited one or more websites when planning their trip to Lee County (88%). Visitors most often mentioned using *airline websites* (40%), followed by *search engines* (30%), *trip advisor* (28%), *hotel* (25%), or *booking* (25%) websites. There was an increase in the incidence of using the *Visit Florida* site, with 16% claiming to do so (vs. 9% in 2014).
- Summer 2015 visitors were most likely to report that they typically access destination planning information online via a laptop (56%) or smartphone (54%). Somewhat fewer mentioned using a tablet (48%) or desktop computer (42%).
- The characteristics rated most favorably as influencing the decision to visit Lee County in summer 2015 included:
 - *Peaceful/relaxing* (88%);
 - *White sandy beaches* (81%);
 - *A safe destination* (77%);
 - *Warm weather* (76%);
 - *Clean, unspoiled environment* (74%); and
 - *Convenient location* (72%).

Visitor Profile

- Same as last summer most visitors flew to the destination (72%), eight in ten arriving at Southwest Florida International Airport (80%) – a slight decrease compared to last year (86% in 2014).
- Summer 2015 visitors said they were staying in Lee County for about 8 days on average, and the majority reported they came to Lee County for a vacation (86%). Six in ten visitors were repeaters (62%) who averaged five trips to Lee County in the past five years. However, summer 2015 saw a modest increase in the proportion of first-timers (37% vs. 32% in 2014).

Visitor Profile (cont'd)

- More than half of summer 2015 survey participants said they were staying in paid lodging (59%). Among them, six in ten reported they were staying in hotel/motel/resort properties, fewer in condo/vacation home properties (39%), and only a small number in RV parks/campgrounds (<1%). Nearly all reported that the quality of their lodging either *met expectations* (57%) or *far exceeded/exceeded expectations* (39%).
- During their trip, summer visitors enjoyed various activities in Lee County such as: *beaches* (95%), *relaxing* (77%), *dining out* (73%), *swimming* (69%), and *shopping* (56%). Half of summer visitors took a day trip outside of Lee County (48%), with many exploring Naples (33%).
- Visitors continue to be highly satisfied with their stay in Lee County. The majority of summer 2015 visitors indicate they were either *very satisfied* or *satisfied* with their visit (50% and 42% respectively). However, *very satisfied* ratings have declined from last year (50% vs. 55% in 2014), which appears to be driven by first-timers who reported lower satisfaction this year (32% vs. 40%).
- Nine in ten summer visitors indicated they will recommend Lee County to a friend over other areas in Florida (87%). Just as many intend to return to Lee County themselves (88%), with half suggesting they will do so next year (56%). First-time visitors in summer 2015 were more likely to report interest in returning to Lee County than they were in 2014 (81% vs. 72% in 2014), despite their lower satisfaction ratings.
- When asked what they liked least about the area during their trip, negative mentions emerged at low levels and included *insects* (19%), *traffic* (17%), *beach seaweed* (14%) and *weather* (13%).
- The demographic composition of summer 2015 visitors can be summarized as follows:
 - 48 years of age on average
 - \$96,000 household income on average
 - 73% married
 - 41% traveling as a couple
 - 38% traveling as a family
 - 68% traveling *without* 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 2014 to 2015 while *occupied* room nights rose 5.4%. The hotel/motel/resort and condo/vacation home categories experienced an increase in *occupied* room nights, but RV parks/campgrounds saw a notable decrease.

Summer Season	Occupied Room Nights			Available Room Nights		
	2014	2015	% Change	2014	2015	% Change
Hotel/Motel/Resort/B&B	568,125	618,669	8.9%	996,884	1,010,165	1.3%
Condo/Cottage/Vacation Home	169,779	181,863	7.1%	376,067	385,902	2.6%
RV Park/Campground	133,672	118,407	-11.4%	467,384	436,726	-6.6%
Total	871,576	918,939	5.4%	1,840,335	1,832,793	-0.4%

- The industry-wide average occupancy rate in Lee County for the summer season increased 5.7% year-over-year. Hotels/motels/resorts and condos/vacation homes posted growth in average occupancy rate, while RV parks/campgrounds posted a decline.
- Lee County's average daily rate for the summer season rose 4.1% year-over-year. All three lodging categories experienced gains in ADR when compared with last year.
- The increases in both average occupancy rate and ADR had a positive impact on RevPAR performance, yielding a 10.2% increase from summer 2014 to 2015. RevPAR increases were most favorable for the hotel/motel/resort and condo/vacation home categories.

Summer Season	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2014	2015	% Change	2014	2015	% Change	2014	2015	% Change
Hotel/Motel/Resort/B&B	57.0%	61.2%	7.4%	\$120.58	\$122.13	1.3%	\$68.72	\$74.80	8.8%
Condo/Cottage/Vacation Home	45.1%	47.1%	4.4%	\$153.67	\$159.12	3.5%	\$69.38	\$74.99	8.1%
RV Park/Campground	28.6%	27.1%	-5.2%	\$40.54	\$44.30	9.3%	\$11.59	\$12.01	3.6%
AVERAGE	47.4%	50.1%	5.7%	\$114.75	\$119.42	4.1%	\$54.34	\$59.88	10.2%

Lodging Industry Assessments (cont'd)

- Lee County property managers are optimistic about their reservations for the upcoming fall season. The majority of managers responding in early October reported that their total level of reservations for October, November, and December 2015 are *up* over the same period last year or the *same* (53% and 35% respectively), with few claiming that their reservation are *down* (7%).

Summer 2015 Lee County Snapshot

Total Visitation				
Summer Season	%		Visitor Estimates	
	2014	2015	2014	2015
Paid Accommodations	63%	66%	693,277	728,080
Friends/Relatives	37%	34%	404,232	375,150
Total Visitation			1,097,509	1,103,230

Total Visitor Expenditures			
Summer Season	2014	2015	% Change
Total Visitor Expenditures	\$479,045,667	\$497,945,851	3.9%
Paid Accommodations	\$308,889,274	\$333,721,725	8.0%

Visitor Origin - Visitors Staying in Paid Accommodations				
Summer Season	%		Visitor Estimates	
	2014	2015	2014	2015
Florida	16%	16%	74,573	79,232
United States	69%	68%	476,000	492,999
Germany	12%	13%	80,380	95,376
UK	7%	8%	45,214	59,106
Canada	5%	4%	35,166	25,523
Other International	8%	8%	56,517	55,076

First-Time/Repeat Visitors to Lee County		
Summer Season	2014	2015
First-time	32%	37%
Repeat	67%	62%

Summer Season	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2014	2015	% Change	2014	2015	% Change	2014	2015	% Change
Hotel/Motel/Resort/B&B	57.0%	61.2%	7.4%	\$120.58	\$122.13	1.3%	\$68.72	\$74.80	8.8%
Condo/Cottage/Vacation Home	45.1%	47.1%	4.4%	\$153.67	\$159.12	3.5%	\$69.38	\$74.99	8.1%
RV Park/Campground	28.6%	27.1%	-5.2%	\$40.54	\$44.30	9.3%	\$11.59	\$12.01	3.6%
AVERAGE	47.4%	50.1%	5.7%	\$114.75	\$119.42	4.1%	\$54.34	\$59.88	10.2%

Calendar YTD 2015 Lee County Snapshot

Total Calendar Year Visitation				
	%		Visitor Estimates	
	2014	2015	2014	2015
Paid Accommodations	59%	61%	2,307,500	2,299,996
Friends/Relatives	41%	39%	<u>1,575,618</u>	<u>1,501,053</u>
Total Visitation			3,883,118	3,801,049

Total Visitor Expenditures			
	2014	2015	% Change
Total Visitor Expenditures	\$2,238,032,397	\$2,332,877,034	4.2%
Paid Accommodations	\$1,511,974,943	\$1,629,152,749	7.7%

Visitor Origin - Visitors Staying in Paid Accommodations				
	%		Visitor Estimates	
	2014	2015	2014	2015
Florida	7%	9%	120,409	153,126
US	78%	78%	1,810,442	1,784,247
Germany	7%	7%	164,017	165,632
Canada	5%	6%	126,456	138,700
UK	3%	5%	80,130	114,461
Other International	5%	4%	126,456	96,955

First-Time/Repeat Visitors to Lee County		
	2014	2015
First-time	27%	33%
Repeat	72%	65%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2014	2015	% Change	2014	2015	% Change	2014	2015	% Change
Hotel/Motel/Resort/B&B	69.2%	73.2%	5.8%	\$154.53	\$160.55	3.9%	\$106.90	\$117.46	9.9%
Condo/Cottage/Vacation Home	67.6%	69.4%	2.6%	\$191.87	\$208.17	8.5%	\$129.75	\$144.46	11.3%
RV Park/Campground	50.3%	53.9%	7.2%	\$52.23	\$56.19	7.6%	\$26.25	\$30.28	15.3%
AVERAGE	64.1%	67.9%	5.9%	\$142.87	\$151.52	6.1%	\$91.62	\$102.87	12.3%

Visitor Profile Analysis Summer 2015

A total of 924 interviews were conducted with visitors in Lee County during the summer months of July, August, and September 2015. 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 935 interviews were conducted with visitors in Lee County during the summer months of July, August, and September 2014. A total sample of this size is considered accurate to plus or minus 3.2 percentage points at the 95% confidence level.

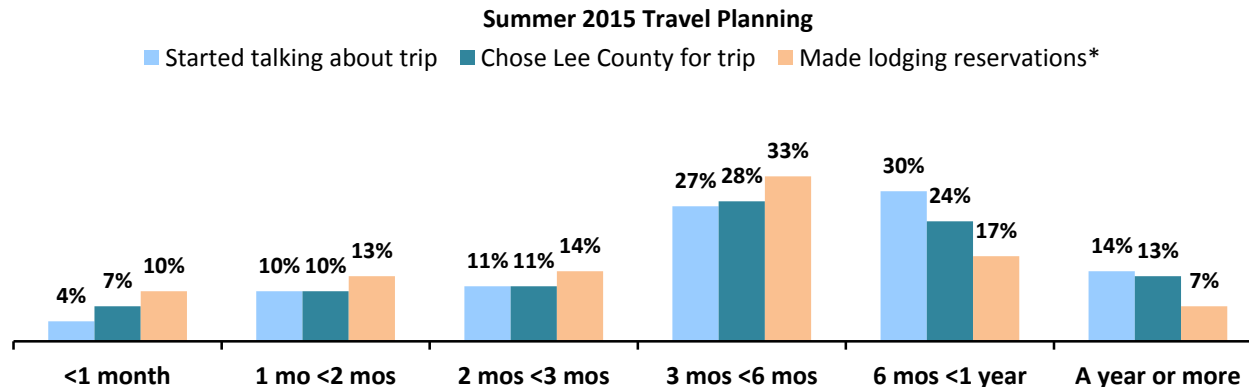
Travel Planning

Summer Season	Started Talking About Trip		Chose Lee County for Trip		Made Lodging Reservations*	
	2014	2015	2014	2015	2014	2015
	A	B	A	B	A	B
Total Respondents	935	924	935	924	557	548
<u>Less than 3 months (NET)</u>	<u>25%</u>	<u>26%</u>	<u>29%</u>	<u>29%</u>	<u>38%</u>	<u>36%</u>
<1 month	5%	4%	6%	7%	11%	10%
1 month - <2 months	9%	10%	12%	10%	16%	13%
2 months - <3 months	11%	11%	11%	11%	11%	14%
<u>3 months or more (NET)</u>	<u>71%</u>	<u>71%</u>	<u>64%</u>	<u>64%</u>	<u>54%</u>	<u>57%</u>
3 months - <6 months	28%	27%	28%	28%	29%	33%
6 months - <1 year	30%	30%	25%	24%	19%	17%
A year or more	13%	14%	12%	13%	6%	7%
No Lodging Reservations Made	-	-	-	-	4%	5%
No Answer	4%	3%	7%	7%	4%b	2%

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		
	2014	2015
Summer Season	A	B
Total Respondents	935	924
<u>Any (NET)</u>	<u>97%</u>	<u>97%</u>
Laptop computer	65% ^b	56%
Smartphone	52%	54%
Tablet	46%	48%
Desktop computer	41%	42%
E-Reader	4%	3%
Other portable device	1%	1%
None of these	2%	3%
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		
	2014	2015
Summer Season	A	B
Respondents who used a device to plan	910	892
<u>Visited web sites (net)</u>	<u>89%</u>	<u>88%</u>
Airline websites	40%	40%
Search Engines	28%	30%
Trip Advisor	30%	28%
Hotel websites	27%	25%
Booking websites	24%	25%
Vacation rental websites	26% ^b	21%
Visit Florida	9%	16% ^a
www.FortMyers-Sanibel.com	12%	11%
Facebook	7%	9%
AAA	10% ^b	6%
Other	11% ^b	8%
None/Didn't visit websites	11%	11%
No Answer	1%	1%

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

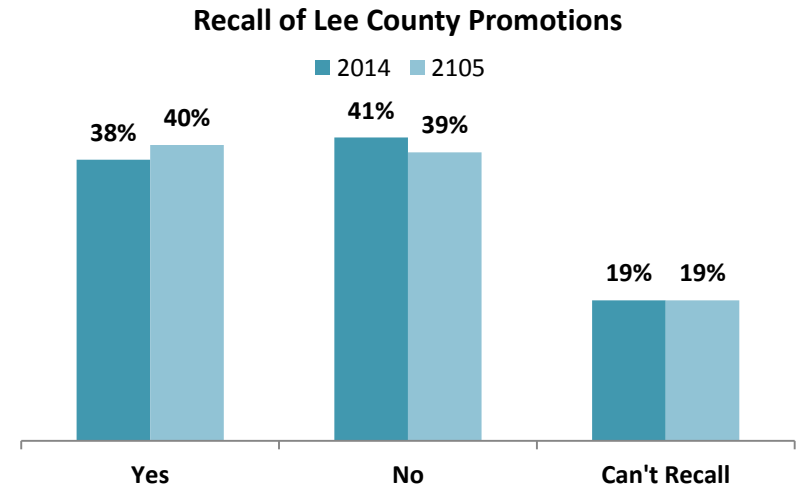
Travel Planning

Travel Information Requested		
	2014	2015
Summer Season	A	B
Total Respondents	935	924
<u>Requested information (NET)</u>	<u>28%</u>	<u>26%</u>
<i>Hotel website</i>	11%	10%
<i>VCB website</i>	6%	6%
<i>Visitor Guide</i>	6% ^b	4%
<i>Call hotel</i>	5%	4%
<i>E-Newsletter</i>	1%	1%
<i>Call local Chamber of Commerce</i>	<1%	1%
<i>Magazine Reader Services Card</i>	<1%	<1%
<i>Call VCB</i>	1%	-
<i>Other</i>	7%	10% ^a
<u>None/Did not request information</u>	<u>67%</u>	<u>68%</u>
No Answer	5%	5%

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

Recall of Lee County Promotions		
	2014	2015
Summer Season	A	B
Total Respondents	935	924
Yes	38%	40%
No	41%	39%
Can't Recall	19%	19%
No Answer	2%	2%

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



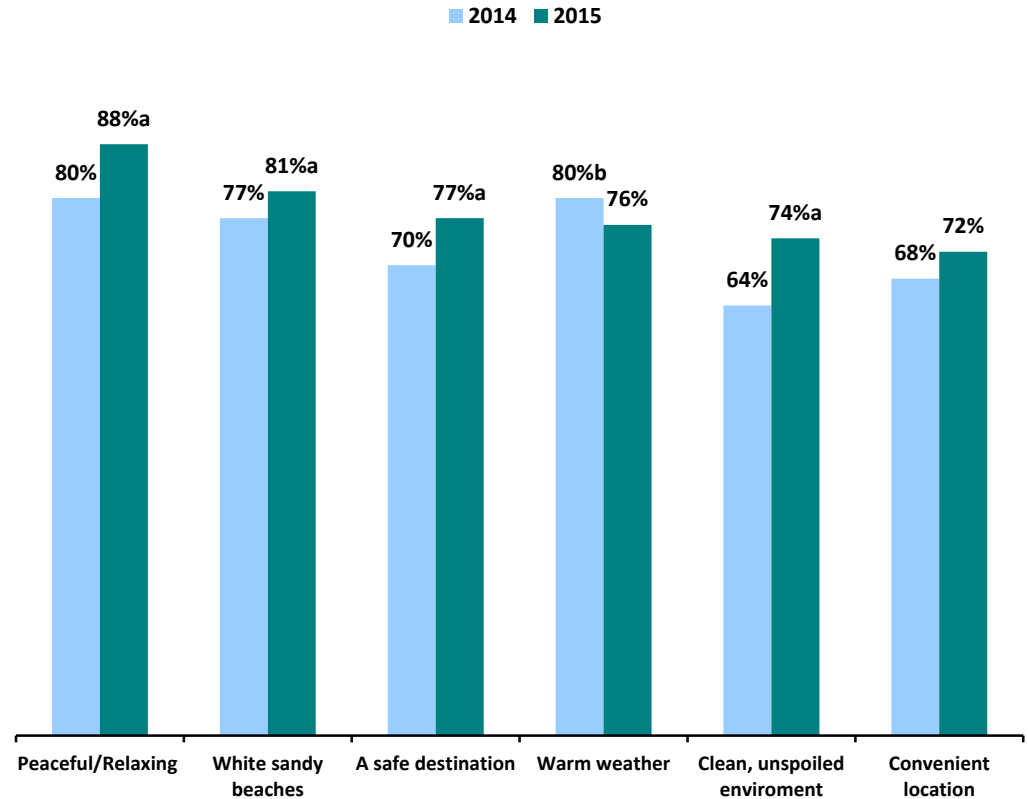
Travel Planning

Travel Decision Influences*		
Summer Season	2014	2015
	A	B
Total Respondents	935	924
Peaceful/Relaxing	80%	88%a
White sandy beaches	77%	81%a
A safe destination	70%	77%a
Warm weather	80%b	76%
Clean, unspoiled environment	64%	74%a
Convenient location	68%	72%
Good value for the money	63%	68%a
Plenty to see and do	56%	65%a
Reasonably priced lodging	56%	61%a
Affordable dining	53%	59%a
A "family" atmosphere	57%	55%
Upscale accommodations	50%	51%

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	2014	2015
	A	B
Total Respondents	935	924
Fly	72%	72%
Drive A personal vehicle	22%	23%
Drive A rental vehicle	6%	5%
Drive an RV	-	1%
Travel by bus	-	-
Other/No Answer	<1%	<1%

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

Frequency of Using SWFL Int'l (Past Year)		
Summer Season	2014	2015
Total Respondents	935	924
<u>One or more trips</u>	<u>56%</u>	<u>58%</u>
1 trip	35%	37%
2 to 3 trips	16%	14%
4 to 5 trips	3%	3%
6 or more trips	2%	3%
None/No Answer	44%	42%

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

Airport Used		
Summer Season	2014	2015
	A	B
Respondents who flew	671	663
SW Florida Int'l (Fort Myers)	86% ^b	80%
Punta Gorda	2%	5% ^a
Miami Int'l	3%	4%
Tampa Int'l	3%	4%
Orlando Int'l	3%	4%
Ft. Lauderdale Int'l	1%	2%
Other	1%	<1%
No Answer	1%	1%

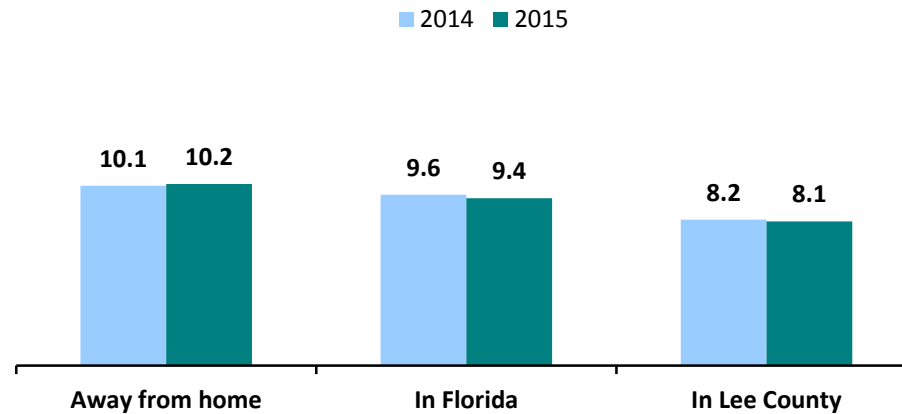
Q2: At which Florida airport did you land?

Trip Profile

Trip Length Mean # of Days		
Summer Season	2014	2015
	A	B
Total Respondents	935	924
Away from home	10.1	10.2
In Florida	9.6	9.4
In Lee County	8.2	8.1

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

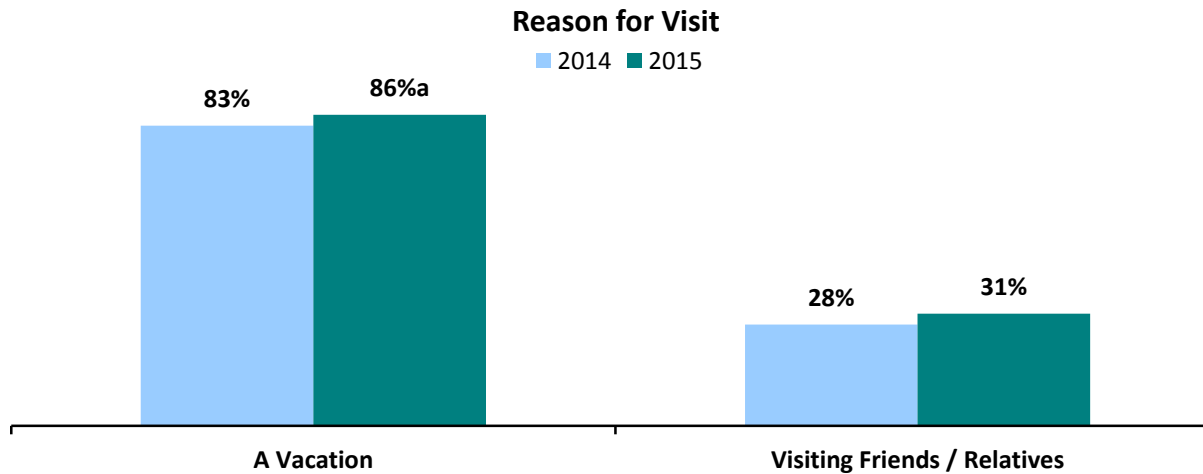
Trip Length (mean # of days)



Trip Profile

Reason(s) for Visit		
Summer Season	2014	2015
	A	B
Total Respondents	935	924
A Vacation	83%	86%a
Visiting Friends/Relatives	28%	31%
Personal Business	3%	3%
Sporting Event(s)	1%	1%
Other Business Trip	1%	1%
A Conference/Meeting	1%	<1%
Other/No Answer (NET)	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	
	2014	2015	2014	2015	2014	2015	2014	2015
	A	B	A	B	A	B	A	B
Total Respondents	935	924	62*	61*	471	429	239	268
First-time visitor	32%	37%a	12%	13%	26%	28%	50%	56%
Repeat visitor	67%b	62%	86%	87%	73%	71%	50%	41%
No Answer	1%	1%	2%	-	1%	1%	<1%	2%

Q15: Is this your first visit to Lee County?

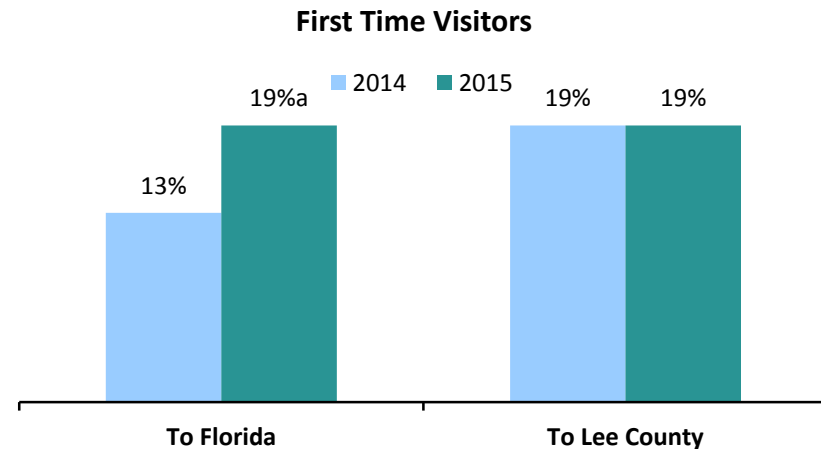
*Note: Small sample size. (N<70) Please interpret results with caution.

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

First Time Visitors to Florida		
Summer Season	2014	2015
Total Respondents	935	924
	A	B
Yes, first-time visitor	13%	19%a
No	79%b	73%
No answer	2%	2%
<i>FL Residents*</i>	7%	7%

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 .



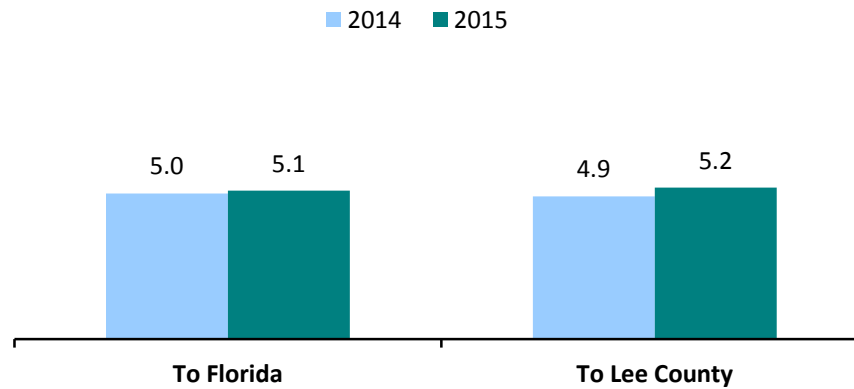
Trip Profile

Previous Visits in Five Years				
Summer Season	Mean # of Visits to Florida		Mean # of Visits to Lee County	
	2014	2015	2014	2015
	A	B	A	B
Base: Repeat Visitors	739 (FL res. Excl)	676 (FL res. Excl)	627	569
Number of visits	5.0	5.1	4.9	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?

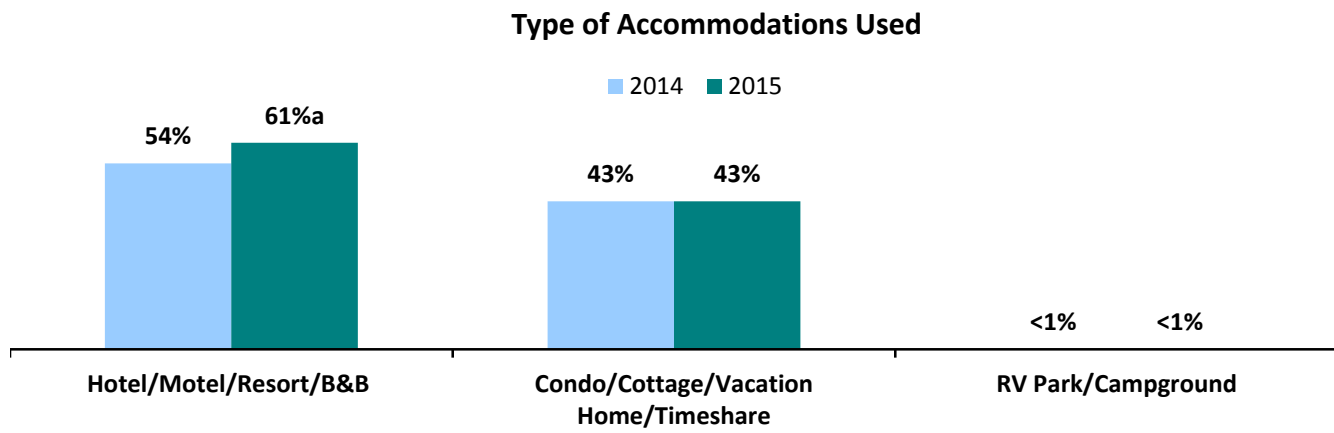
Previous Visits in Five Years



Trip Profile

Type of Accommodations Used		
Summer Season	2014	2015
	A	B
Total respondents staying in paid accommodations	557	548
<u>Hotel/Motel/Resort/B&B (NET)</u>	<u>54%</u>	<u>61%a</u>
At a hotel/motel/historic inn	35%	36%
At a resort	20%	23%
At a Bed and Breakfast	<1%	1%a
<u>Condo/Cottage/Vacation Home/Timeshare (NET)</u>	<u>45%b</u>	<u>39%</u>
<u>RV Park/Campground (NET)</u>	<u><1%</u>	<u><1%</u>

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



Trip Profile

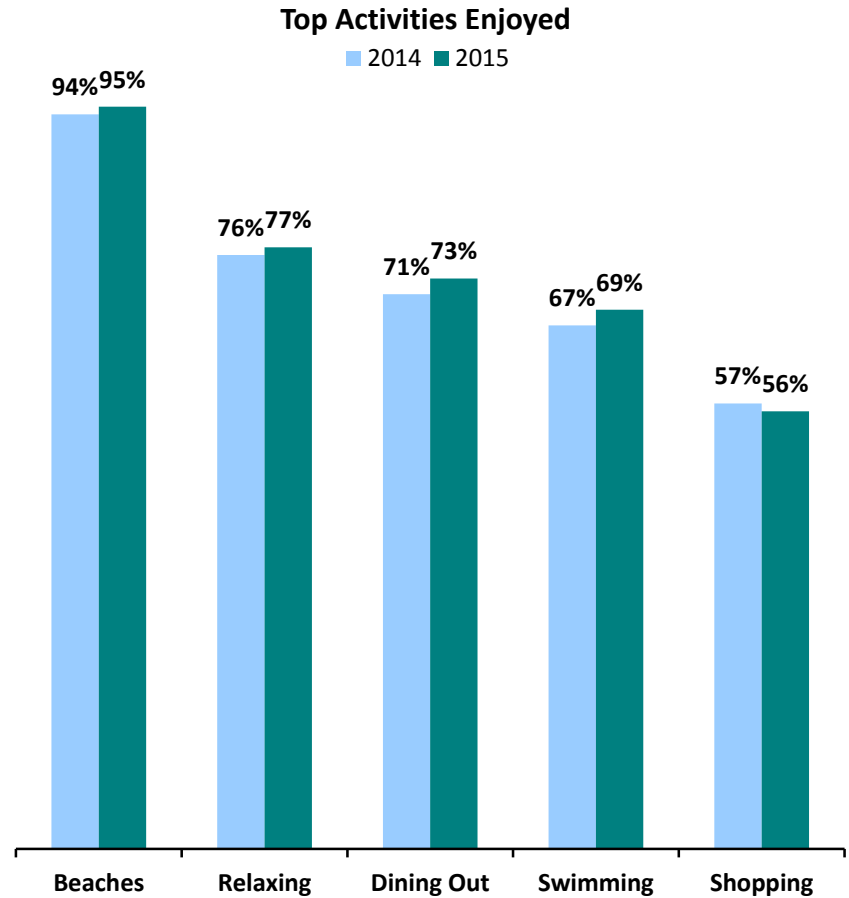
Quality of Accommodations		
Summer Season	2014	2015
	A	B
Total respondents staying in paid accommodations	557	548
Far exceeded/Exceeded expectations	50% ^b	39%
Met your expectations	45%	57% ^a
Did not meet/Far below expectations	3%	2%
No Answer	2%	2%

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

Ratings by Subgroup								
Summer Season	First-Timers		Repeaters		U.S. Residents		International Residents	
	2014	2015	2014	2015	2014	2015	2014	2015
	A	B	A	B	A	B	A	B
Total respondents staying in paid accommodations	219	232	332	312	379	367	172	175
Far exceeded/Exceeded expectations	48% ^b	35%	51% ^b	42%	48% ^b	39%	55% ^b	39%
Met your expectations	46%	60% ^a	44%	55% ^a	46%	57% ^b	42%	56% ^a
Did not meet/Far below expectations	3%	2%	4%	2%	4%	2%	2%	2%
No Answer	2%	4%	2%	1%	2%	2%	2%	3%

Trip Activities

Activities Enjoyed		
Summer Season	2014	2015
	A	B
Total Respondents	935	924
Beaches	94%	95%
Relaxing	76%	77%
Dining Out	71%	73%
Swimming	67%	69%
Shopping	57%	56%
Sightseeing	37%	39%
Shelling	38%	34%
Visiting Friends/Relatives	25%	29%
Watching Wildlife	23%	25%
Photography	18%	23%a
Bicycle Riding	17%	20%
Attractions	19%	17%
Exercise/Working Out	13%	17%a
Miniature Golf	9%	17%a
Birdwatching	12%	16%a
Boating	13%	13%
Fishing	12%	13%
Bars/Nightlife	13%	12%
Golfing	11%	12%
Kayaking/Canoeing	9%	9%
Parasailing/Jet Skiing	9%	7%
Guided Tour	6%	6%
Tennis	4%	4%
Cultural Events	4%	3%
Scuba Diving/Snorkeling	3%	3%
Sporting Event	3%	3%
Other	3%	3%
No Answer	2%	1%



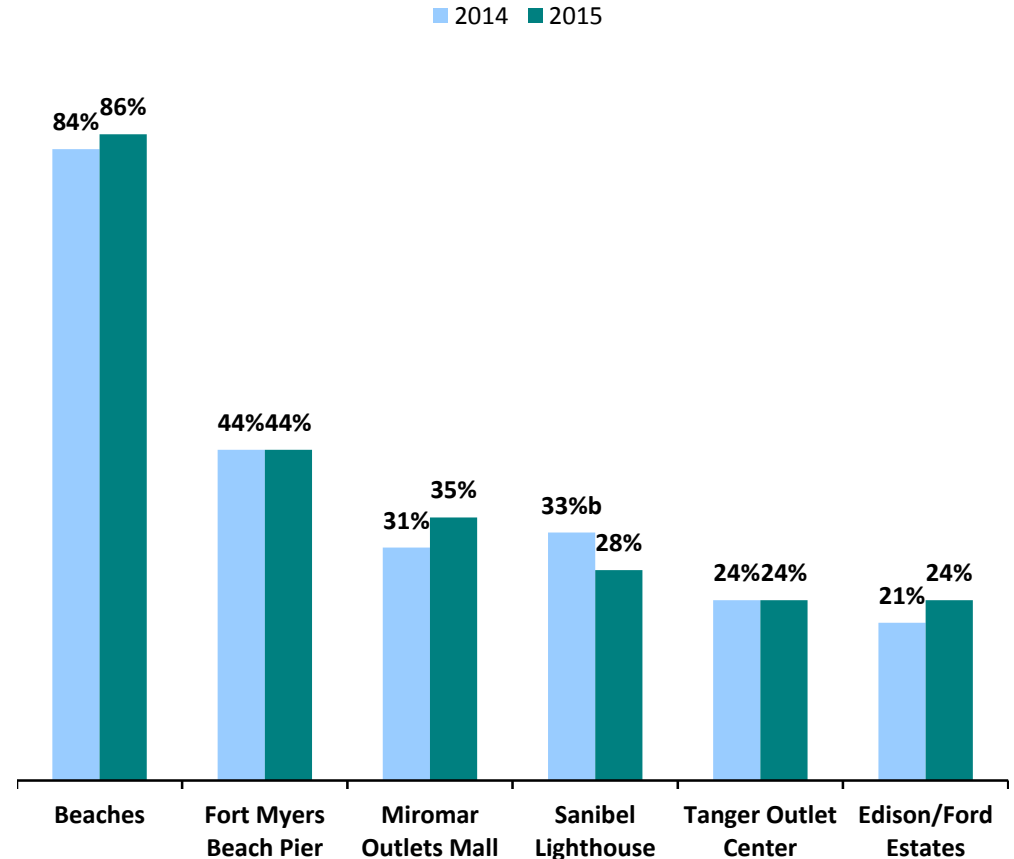
Q23: What activities or interests are you enjoying while in Lee County?
(Please mark ALL that apply.)

Trip Activities

Attractions Visited		
Summer Season	2014	2015
	A	B
Total Respondents	935	924
Beaches	84%	86%
Fort Myers Beach Pier	44%	44%
Miromar Outlets Mall	31%	35%
Sanibel Lighthouse	33% ^b	28%
Tanger Outlet Center	24%	24%
Edison / Ford Estates	21%	24%
Shell Factory and Nature Park	7%	13% ^a
Gulf Coast Town Center	10%	13%
Bell Tower Shops	11%	11%
Ding Darling National Wildlife Refuge	14% ^b	11%
Coconut Point Mall	14% ^b	10%
Edison Mall	9%	9%
Periwinkle Place	11%	9%
Manatee Park	3%	3%
Bailey-Matthews Shell Museum	3%	3%
Broadway Palm Dinner Theater	2%	1%
Babcock Wilderness Adventures	1%	<1%
Barbara B. Mann Performing Arts Hall	1%	<1%
Other	5%	4%
None/No Answer	5%	7%

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

Top Attractions Visited



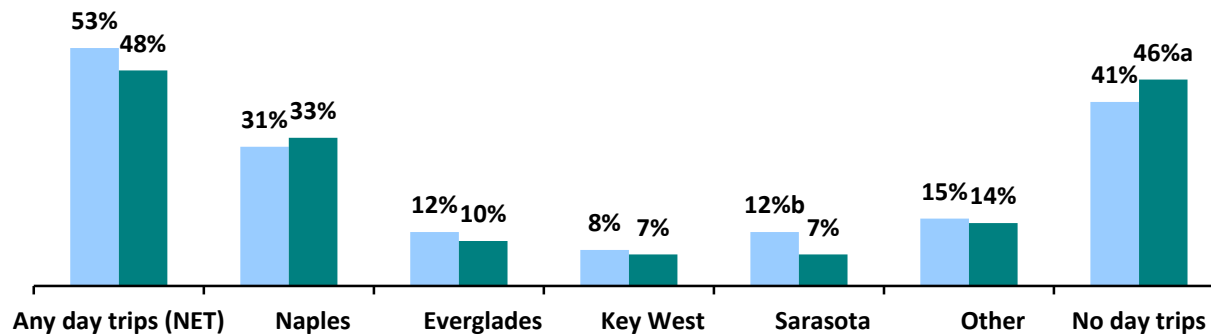
Trip Activities

Day Trips Outside Lee County		
Summer Season	2014	2015
	A	B
Total Respondents	935	924
<u>Any day trips (NET)</u>	<u>53%</u>	<u>48%</u>
Naples	31%	33%
Everglades	12%	10%
Key West	8%	7%
Sarasota	12% ^b	7%
Other	15%	14%
<u>No day trips</u>	<u>41%</u>	<u>46%^a</u>
No Answer	14%	12%

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

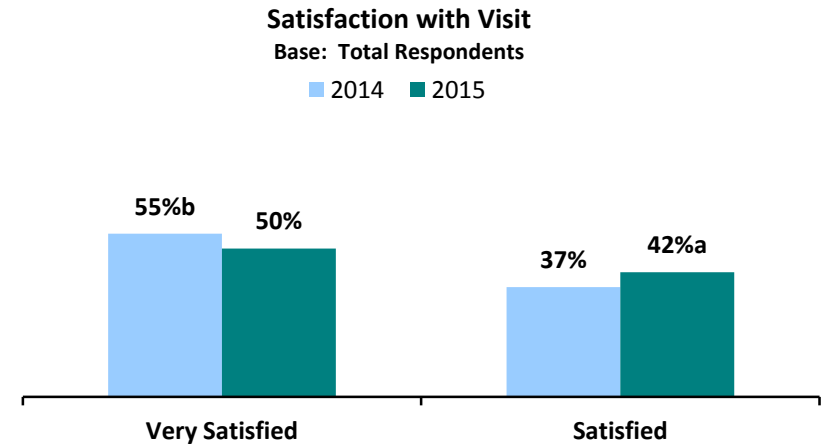
Day Trips Outside Lee County

■ 2014 ■ 2015



Lee County Experience

Satisfaction with Visit		
	Total Respondents	
Summer Season	2014	2015
	A	B
Total Respondents	935	924
<u>Very Satisfied/Satisfied</u>	<u>92%</u>	<u>92%</u>
<i>Very Satisfied</i>	55%b	50%
<i>Satisfied</i>	37%	42%a
Neither	2%	1%
Dissatisfied/Very Dissatisfied	<1%	<1%
Don't know/no answer	6%	6%



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

Ratings by Subgroup								
	First-Timers		Repeaters		U.S. Residents		International Residents	
Summer Season	2014	2015	2014	2015	2014	2015	2014	2015
	A	B	A	B	A	B	A	B
Total Respondents	295	344	627	569	688	642	239	268
<u>Very Satisfied/Satisfied</u>	88%	88%	94%	94%	92%	93%	94%	91%
<i>Very Satisfied</i>	40%b	32%	62%	60%	59%	55%	45%	37%
<i>Satisfied</i>	48%	56%a	32%	34%	33%	38%	49%	54%

Future Plans

Likelihood to Recommend/Return to Lee County		
Summer Season	2014	2015
	A	B
Total Respondents	935	924
Likely to Recommend Lee County	89%	87%
Likely to Return to Lee County	87%	88%
Base: Total Respondents Planning to Return	810	811
Likely to Return Next Year	53%	56%

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

Q31: Will you come back to Lee County?

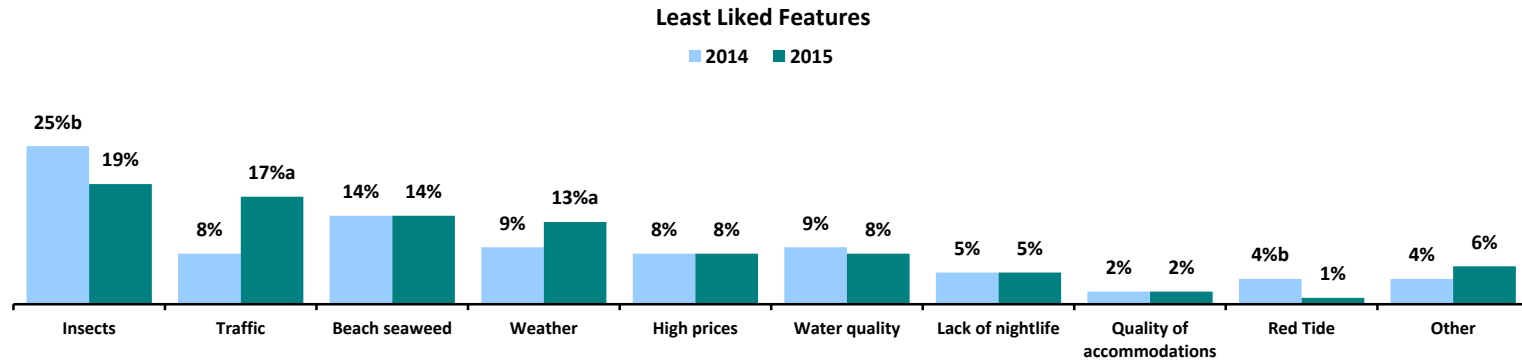
Q32: Will you come back next year?

Ratings by Subgroup								
Summer Season	First-Timers		Repeaters		U.S. Residents		International Residents	
	2014	2015	2014	2015	2014	2015	2014	2015
	A	B	A	B	A	B	A	B
Total Respondents	295	344	627	569	688	642	239	268
Likely to Recommend Lee County	82%	82%	92%	89%	89%	88%	90%	85%
Likely to Return to Lee County	72%	81%a	93%	92%	89%	89%	81%	84%
Base: Total Respondents Planning to Return	212	277	585	525	612	574	194	225
Likely to Return Next Year	27%	35%a	63%	67%	61%	60%	30%	47%a

Trip Activities

Least Liked Features		
Summer Season	2014	2015
	A	B
Total Respondents	935	924
Insects	25% ^b	19%
Traffic	8%	17% ^a
Beach seaweed	14%	14%
Weather	9%	13% ^a
High prices	8%	8%
Water quality	9%	8%
Lack of nightlife	5%	5%
Quality of accommodations	2%	2%
Red Tide	4% ^b	1%
Other	4%	6% ^a
Nothing/No Answer (NET)	41%	40%

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

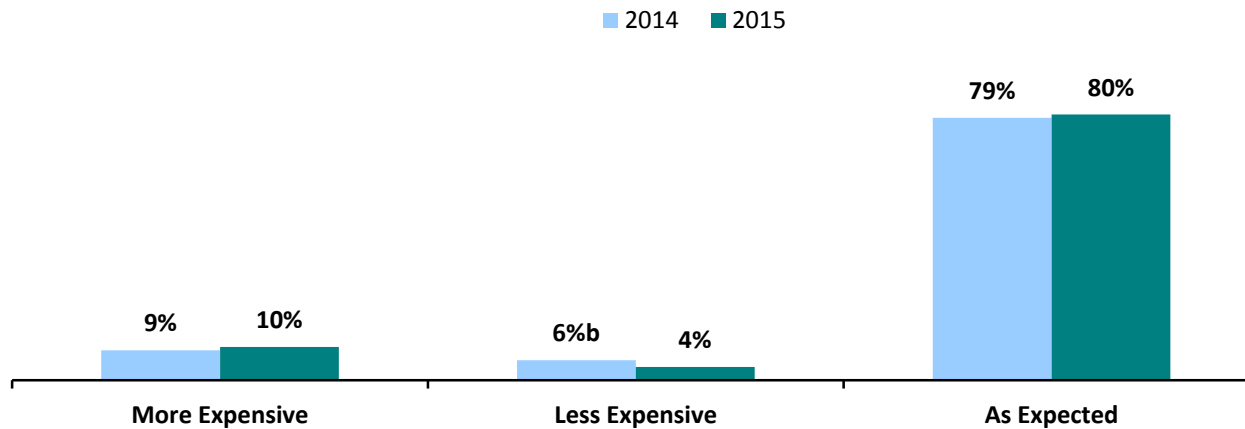


Trip Activities

Perception of Lee County as Expensive		
Summer Season	2014	2015
	A	B
Total Respondents	935	924
More Expensive	9%	10%
Less Expensive	6% ^b	4%
As Expected	79%	80%
Don't know/No Answer (NET)	7%	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	2014	2015
	A	B
Total Respondents	935	924
Age of respondent (mean)	49.0b	47.5
Annual household income (mean)	\$103,189b	\$95,838
<u>Martial Status</u>		
Married	74%	73%
Single	13%	15%
Other	10%	9%
Vacations per year (mean)	3.1	3.0
Short getaways per year (mean)	3.4	3.3

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	2014	2015
	A	B
Total Respondents	935	924
Couple	42%	41%
Family	34%	38%a
Group of couples/friends	13%	11%
Single	9%	8%
Mean travel party size	3.3	3.3
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	2014	2015
	A	B
Total Respondents	935	924
<u>Traveling with any Children (net)</u>	<u>32%</u>	<u>32%</u>
Any younger than 6	9%	11%
Any ages 6-11	14%	14%
Any 12-17 years old	19%	18%
No Children	68%	68%

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		
Summer Season	2014	2015	2014	2015	% Change
Paid Accommodations	63%	66%	693,277	728,080	5.0%
Friends/Relatives	37%	34%	404,232	375,150	-7.2%
Total Visitation			1,097,509	1,103,230	0.5%

Visitors Staying in Paid Accommodations					
	%		Visitor Estimates		% Change
Summer Season	2014	2015	2014	2015	
Country of Origin					
United States	69%	68%	476,000	492,999	3.6%
Germany	12%	13%	80,380	95,376	18.7%
UK	7%	8%	45,214	59,106	30.7%
Canada	5%	4%	35,166	25,523	-27.4%
Scandinavia	2%	2%	12,559	14,777	17.7%
Switzerland	1%	2%	10,047	12,090	20.3%
BeNeLux	2%	1%	12,559	6,717	-46.5%
France	1%	1%	7,536	6,717	-10.9%
Austria	1%	<1%	3,768	2,687	-28.7%
Latin America	1%	1%	3,768	6,717	78.3%
Ireland	<1%	-	1,256	-	-
Other International	1%	1%	5,024	5,373	7.0%

U.S. Region of Origin	2014	2015	2014	2015	% Change
Florida	16%	16%	74,573	79,232	6.2%
South (including Florida)	33%	39%	155,493	191,917	23.4%
Midwest	36%	38%	169,773	184,875	8.9%
Northeast	29%	20%	138,040	98,600	-28.6%
West	3%	4%	12,693	17,607	38.7%

Summer 2015 Top DMAs (Paid Accommodations)		
New York	6%	29,932
Indianapolis	5%	26,411
Miami-Fort Lauderdale	5%	24,650
Chicago	4%	21,129
Tampa-Saint Petersburg (Sarasota)	4%	19,368
Atlanta	4%	19,368
Cincinnati	4%	17,607
Cleveland-Akron (Canton)	3%	15,846
Boston (Manchester, NH)	3%	15,846
Kansas City	3%	15,846
Pittsburgh	3%	14,086
Columbus, OH	3%	14,086
Orlando-Daytona Beach-Melbourne	3%	14,086

Note: The percentage of visitors by origin market is based on data collected from visitors in the Visitor Profile Survey. Respondents who did not answer the area of residence questions are excluded when calculating the 2015 percentages.

Occupancy Data Analysis Summer 2015

For the 2015 summer season, property managers were interviewed in October 2015 to provide data for each specific month of the season (July, August, and September 2015).

For the 2014 summer season, property managers were interviewed in October 2014 to provide data for each specific month of the season (July, August, and September 2014).

Occupancy/Daily Rates

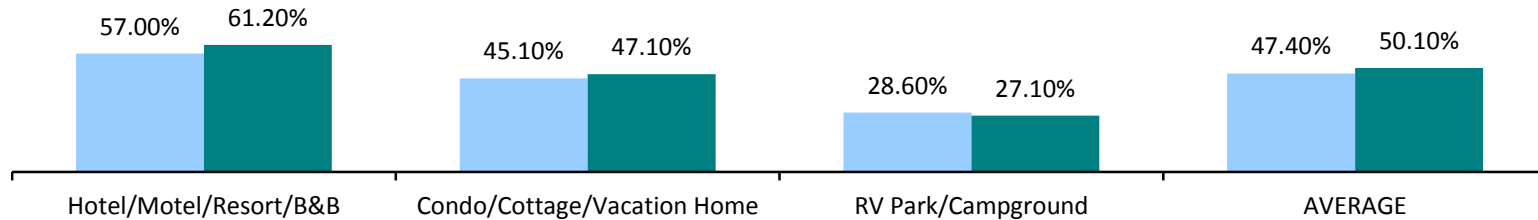
	Average Occupancy Rate			Average Daily Rate			RevPAR		
Summer Season	2014	2015	% Change	2014	2015	% Change	2014	2015	% Change
Hotel/Motel/Resort/B&B	57.0%	61.2%	7.4%	\$120.58	\$122.13	1.3%	\$68.72	\$74.80	8.8%
Condo/Cottage/Vacation Home	45.1%	47.1%	4.4%	\$153.67	\$159.12	3.5%	\$69.38	\$74.99	8.1%
RV Park/Campground	28.6%	27.1%	-5.2%	\$40.54	\$44.30	9.3%	\$11.59	\$12.01	3.6%
AVERAGE	47.4%	50.1%	5.7%	\$114.75	\$119.42	4.1%	\$54.34	\$59.88	10.2%

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]?

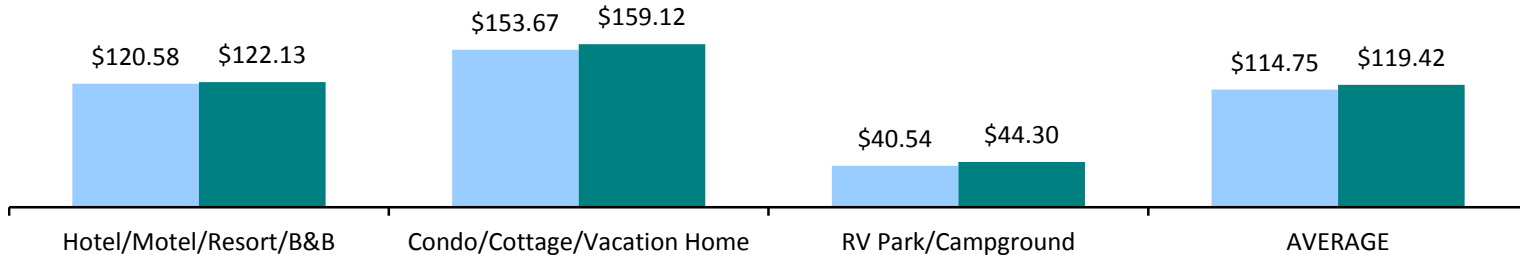
Average Occupancy Rate

■ 2014 ■ 2015



Average Daily Rate

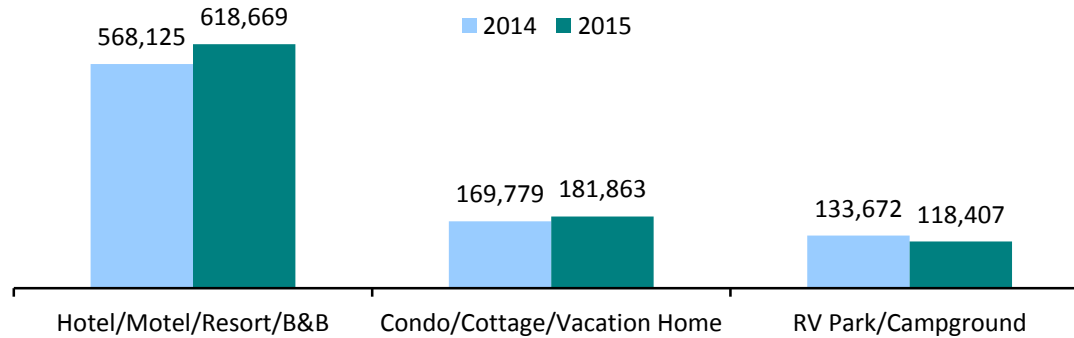
■ 2014 ■ 2015



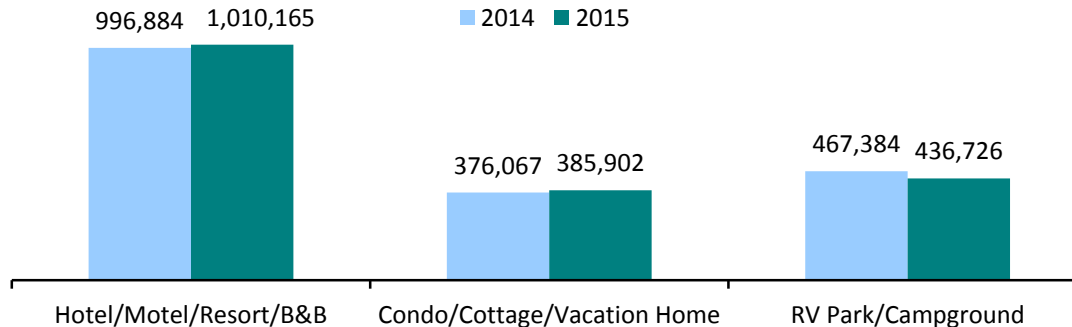
Room/Unit/Site Nights

Summer Season	Occupied Room Nights			Available Room Nights		
	2014	2015	% Change	2014	2015	% Change
Hotel/Motel/Resort/B&B	568,125	618,669	8.9%	996,884	1,010,165	1.3%
Condo/Cottage/Vacation Home	169,779	181,863	7.1%	376,067	385,902	2.6%
RV Park/Campground	133,672	118,407	-11.4%	467,384	436,726	-6.6%
Total	871,576	918,939	5.4%	1,840,335	1,832,793	-0.4%

Occupied Room Nights



Available Room Nights



Average Party Size and Length of Stay

Summer Season	Average Party Size			Average Length of Stay		
	2014	2015	% Change	2014	2015	% Change
Hotel/Motel/Resort/B&B	2.5	2.6	3.4%	2.8	2.8	1.0%
Condo/Cottage/Vacation Home	4.8	4.1	-13.4%	6.3	6.8	9.1%
RV Park/Campground	2.3	2.3	2.2%	7.3	7.7	5.0%
Average	2.9	2.9	-1.7%	3.7	3.6	-1.3%

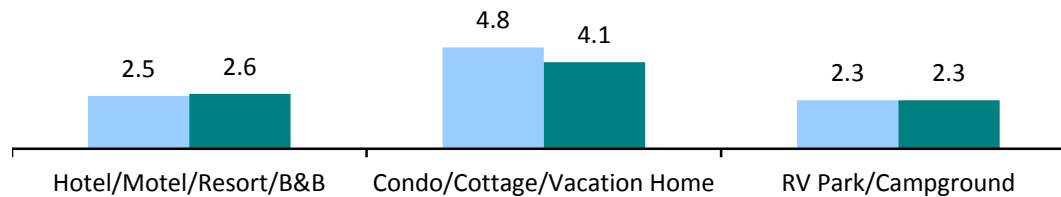
Q18: What was your average number of guests per room/site/unit in [July/August/September]?

Q19: What was the average length of stay (in nights) of your guests in [July/August/September]?

Note: Year-over-year percent change is calculated using unrounded figures for estimated average party size and length of stay.

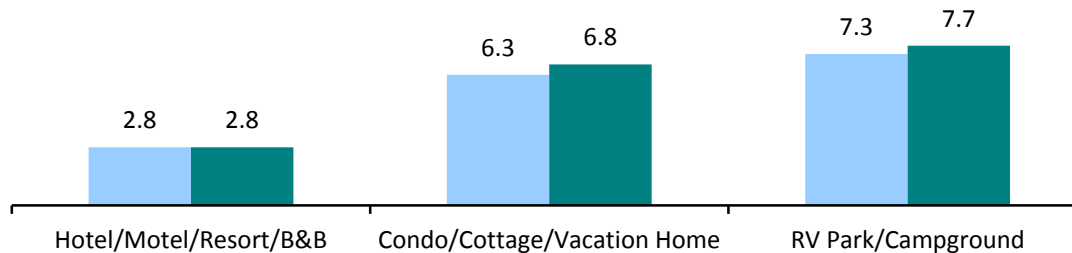
Average Party Size

■ 2014 ■ 2015



Average Length of Stay

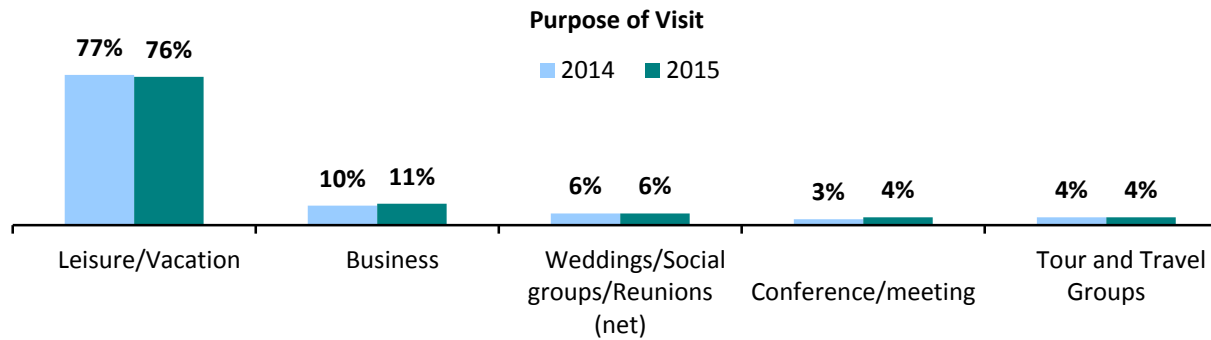
■ 2014 ■ 2015



Lodging Management Estimates

Guest Profile		
Summer Season	2014	2015
	A	B
Total Number of Responses	99	98
<u>Purpose of Visit</u>		
Leisure/Vacation	77%	76%
Business	10%	11%
Weddings/Social groups/Reunions (net)	6%	6%
Conference/meeting	3%	4%
Tour and Travel Groups	4%	4%

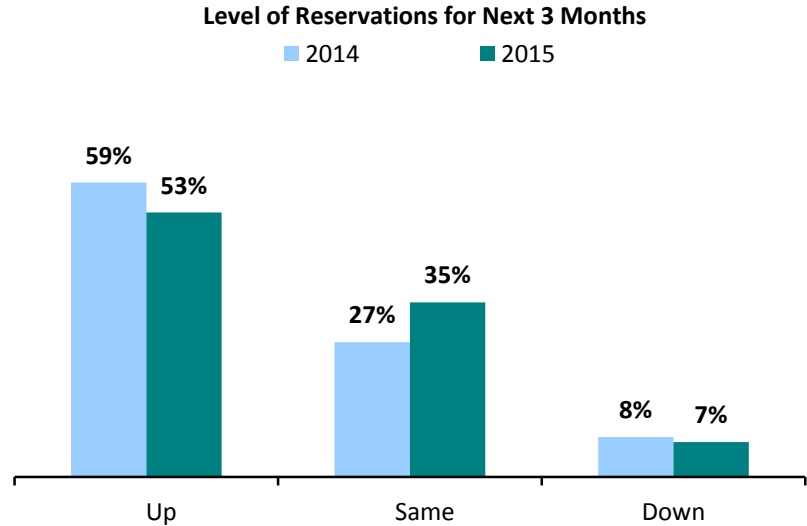
Q22: What percent of your [July/August/September] room/site/unit occupancy do you estimate was generated by:



Occupancy Barometer

Level of Reservations for Next 3 Months Compared to Last Year		
Summer Season	2014	2015
	A	B
Total Respondents	107	107
<u>Up/Same (net)</u>	<u>86%</u>	<u>88%</u>
Up	59%	53%
Same	27%	35%
Down	8%	7%

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

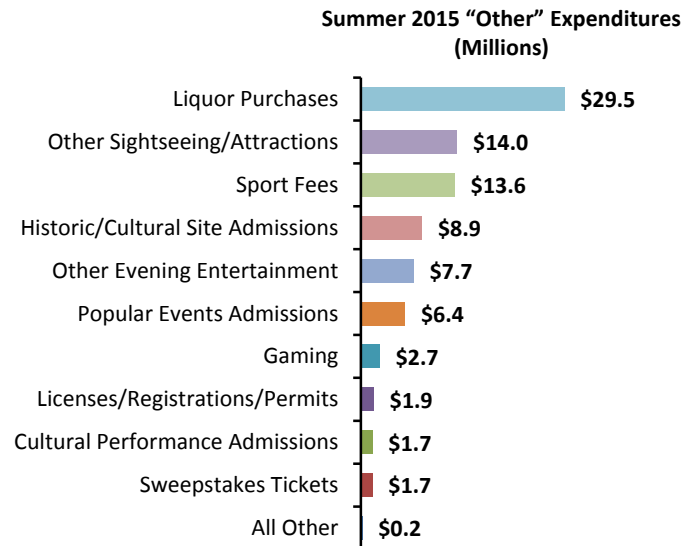


Economic Impact Analysis Summer 2015

Total Visitor Expenditures by Spending Category

TOTAL EXPENDITURES			
Summer Season	2014	2015	% Change
<u>TOTAL</u>	<u>\$479,045,667</u>	<u>\$497,945,851</u>	<u>3.9%</u>
Food and Beverages	\$128,935,362	\$132,313,440	2.6%
Shopping	\$123,779,875	\$124,776,648	0.8%
Lodging Accommodations	\$100,012,810	\$109,739,824	9.7%
Ground Transportation	\$41,053,678	\$42,874,494	4.4%
Other	\$85,263,942	\$88,241,445	3.5%

(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

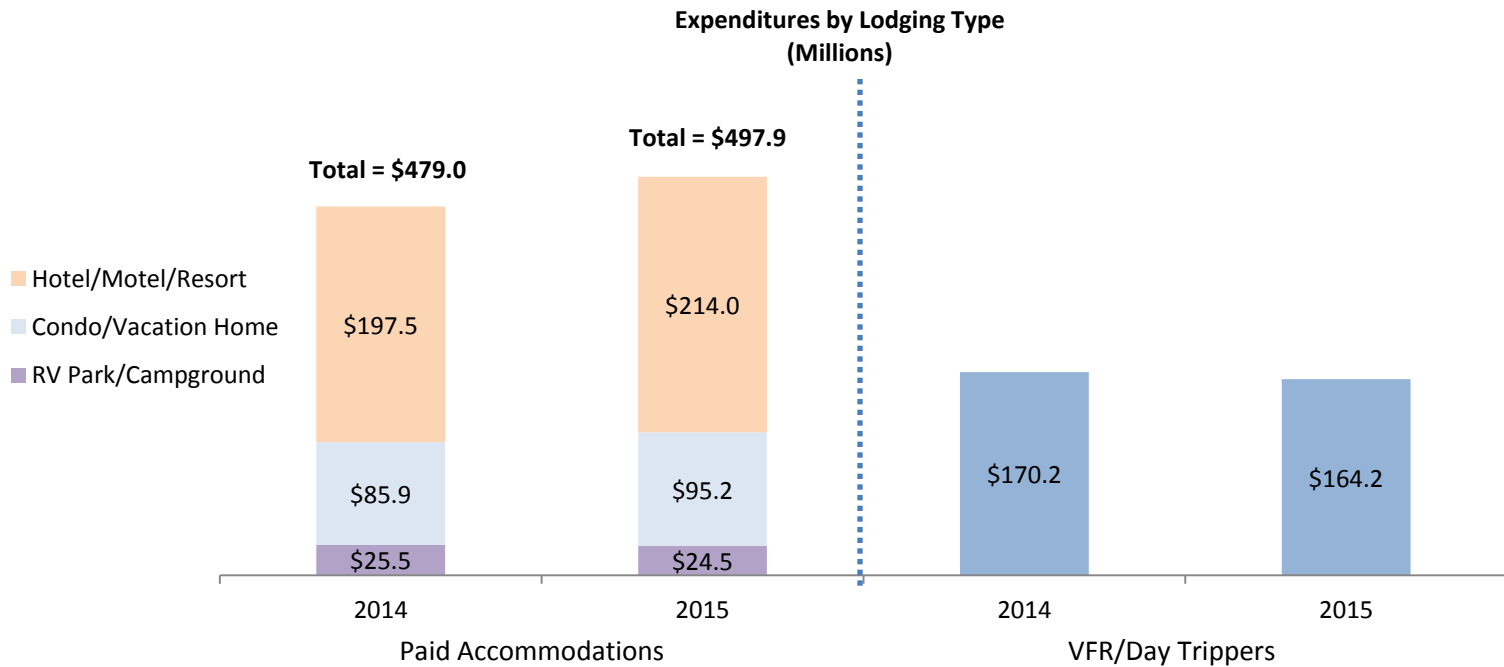
TOTAL EXPENDITURES						
	Staying Paid Accommodations			Visiting Friends and Relatives/Day Trippers		
Summer Season	2014	2015	% Change	2014	2015	% Change
<u>TOTAL</u>	<u>\$308,889,274</u>	<u>\$333,721,725</u>	8.0%	<u>\$170,156,393</u>	<u>\$164,224,126</u>	-3.5%
Lodging Accommodations	\$100,012,810	\$109,739,824	9.7%	\$0	\$0	-
Food and Beverages	\$71,375,597	\$76,555,570	7.3%	\$57,559,765	\$55,757,870	-3.1%
Shopping	\$67,351,915	\$72,543,074	7.7%	\$56,427,960	\$52,233,574	-7.4%
Ground Transportation	\$24,874,335	\$26,565,426	6.8%	\$16,179,343	\$16,309,068	0.8%
Other	\$45,274,617	\$48,317,831	6.7%	\$39,989,325	\$39,923,614	-0.2%

“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	2014	2015	% Change	2014	2015
<u>TOTAL</u>	<u>\$479,045,667</u>	<u>\$497,945,851</u>	<u>3.9%</u>	<u>100%</u>	<u>100%</u>
Visiting Friends & Relatives/Day Trippers	\$170,156,393	\$164,224,126	-3.5%	36%	33%
<u>Paid Accommodations</u>	<u>\$308,889,274</u>	<u>\$333,721,725</u>	<u>8.0%</u>	<u>64%</u>	<u>67%</u>
<i>Hotel/Motel/Resort/B&B</i>	\$197,473,622	\$214,043,706	8.4%	41%	43%
<i>Condo/Cottage/Vacation Home</i>	\$85,866,276	\$95,214,084	10.9%	18%	19%
<i>RV Park/Campground</i>	\$25,549,376	\$24,463,935	-4.2%	5%	5%



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.

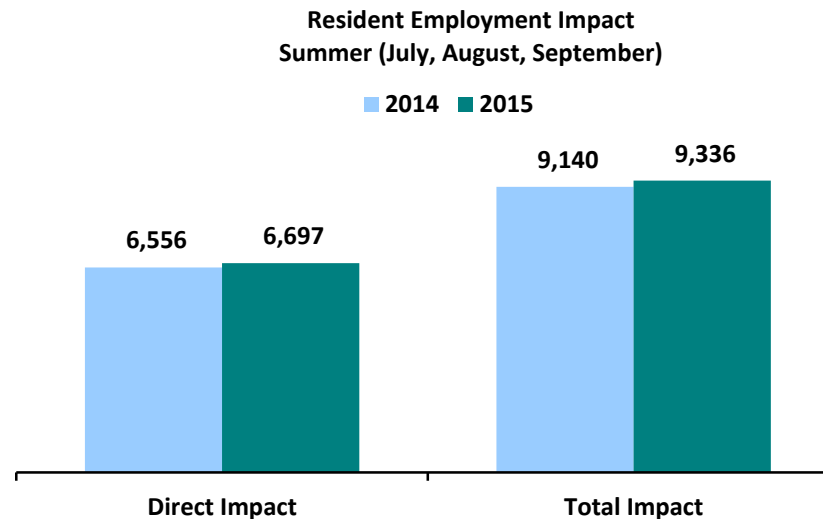
Impact on Jobs for Lee County Residents

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.).



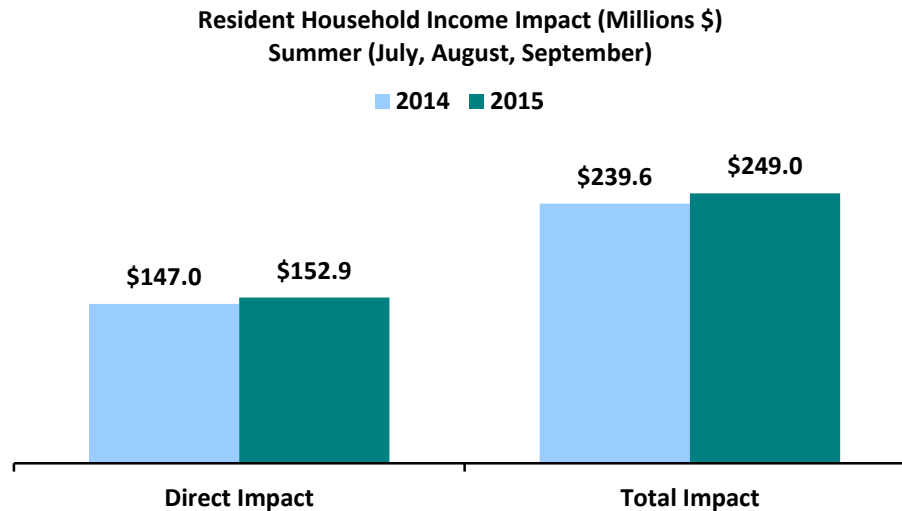
Impact on Household Income for Lee County Residents

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.

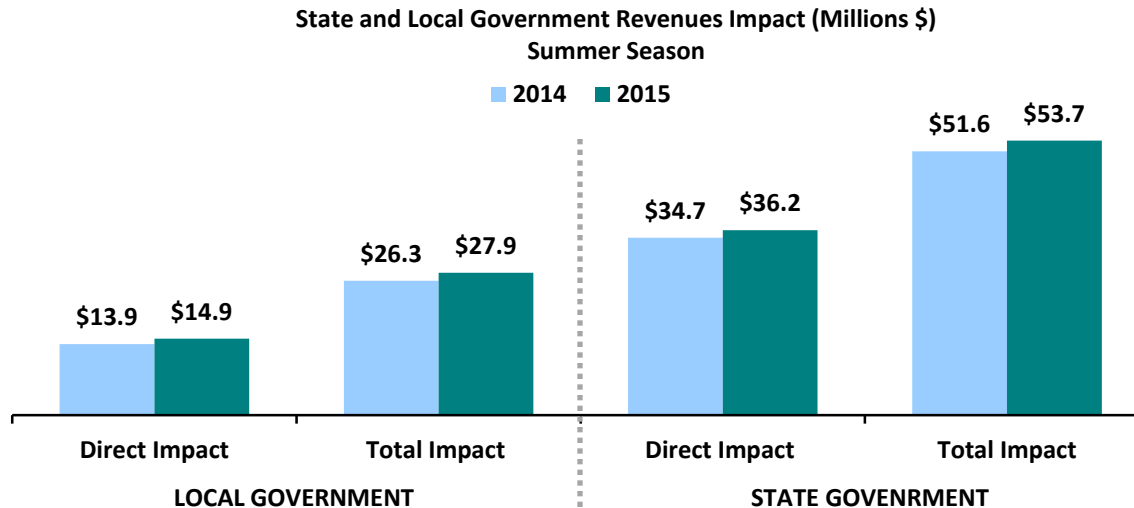
The gross government revenues accruing to governments as a result of producing the output purchased with visitor expenditures is the government revenue impact.

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 2015

July 2015 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Fort Myers	Edison & Ford Estates	7/1/2015	28
Bonita Springs	Bonita Beach	7/3/2015	29
Fort Myers Beach	Best Western	7/7/2015	10
Fort Myers Beach	Cane Palm	7/7/2015	7
Fort Myers Beach	Times Square	7/7/2015	20
Fort Myers	RSW Airport	7/11/2015	33
Sanibel	Coquina Beach Club	7/16/2015	9
Sanibel	Pointe Santo	7/16/2015	10
Sanibel	Holiday Inn	7/16/2015	11
Sanibel	Lighthouse Beach	7/16/2015	10
Sanibel	Sanibel Inn	7/16/2015	8
Sanibel	Casa Ybel	7/16/2015	8
Sanibel	Loggerhead Cay	7/16/2015	10
Fort Myers	Edison & Ford Estates	7/24/2015	27
Fort Myers	RSW Airport	7/25/2015	31
Fort Myers	Centennial Park	7/26/2015	8
Fort Myers Beach	Neptune Inn	7/28/2015	8
Fort Myers Beach	Estero Island Beach Club	7/29/2015	11
Fort Myers Beach	Diamond Head Resort	7/29/2015	10
Fort Myers	Miromar Outlet	7/30/2015	19
Total			307

August 2015 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Sanibel	Lighthouse Beach	8/3/2015	15
Sanibel	Compass Pointe	8/3/2015	6
Sanibel	Sanibel Surfside	8/3/2015	6
Sanibel	Holiday Inn	8/3/2015	12
Bonita Springs	Bonita Beach	8/7/2015	30
Fort Myers	RSW Airport	8/8/2015	31
Fort Myers Beach	Neptune Inn	8/11/2015	8
Fort Myers Beach	Diamond Head Resort	8/11/2015	11
Fort Myers Beach	Estero Island Beach Club	8/11/2015	12
Fort Myers	Edison & Ford Estates	8/14/2015	27
Sanibel	Pointe Santo	8/19/2015	8
Sanibel	Tarpon Beach Club	8/19/2015	6
Sanibel	Sundial Resort	8/19/2015	12
Fort Myers Beach	Best Western	8/21/2015	12
Fort Myers Beach	Cane Palm	8/21/2015	6
Fort Myers Beach	Times Square	8/21/2015	21
Fort Myers	Edison & Ford Estates	8/27/2015	29
Estero	Miromar Outlet	8/28/2015	16
Fort Myers	Centennial Park	8/28/2015	8
Fort Myers	RSW Airport	8/29/2015	33
Total			309

September 2015 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Fort Myers Beach	Times Square	9/4/2015	29
Sanibel	Lighthouse Beach	9/5/2015	28
Fort Myers	Centennial Park	9/6/2015	8
Cape Coral	Cape Coral Yacht Club	9/7/2015	10
Bonita Springs	Bonita Beach	9/8/2015	29
Fort Myers	Edison & Ford Estates	9/11/2015	27
Fort Myers	RSW Airport	9/12/2015	31
Fort Myers	Edison & Ford Estates	9/18/2015	28
Estero	Miromar Outlet	9/19/2015	8
Fort Myers Beach	The Pier	9/25/2015	21
Fort Myers Beach	Estero Island Beach Club	9/25/2015	10
Fort Myers Beach	Best Western	9/25/2015	10
Fort Myers	RSW Airport	9/26/2015	32
Sanibel	Sundial Resort	9/29/2015	6
Sanibel	Pointe Santo	9/29/2015	8
Sanibel	Tarpon Beach Club	9/29/2015	6
Sanibel	Holiday Inn	9/30/2015	8
Sanibel	Sanibel Surfside	9/30/2015	9
Total			308

Occupancy Interviewing Statistics

Interviews were conducted during the first two weeks of October 2015 to gather information about lodging activity during July, August, and September 2015. Information was provided by 114 Lee County lodging properties.

Lodging Type	Summer 2015 Number of Interviews
Hotel/Motel/Resort/B&Bs	64
Condo/Cottage/Vacation Home/Timeshare	32
RV Park/Campground	18
Total	114