



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

Spring 2014 Visitor Profile and Occupancy Analysis

August 14, 2014

Prepared for:

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

Prepared by:

Davidson-Peterson Associates



Executive Summary Spring 2014 (April, May, and June)

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

For example:

2013 A	2014 B
70%	80%A

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

Executive Summary

Visitation Estimates

- The spring 2014 brought approximately 837,000 paid accommodation visitors to Lee County. An additional 529,000 visitors stayed with friends or relatives for an estimated total of 1.37 million visitors.
- Spring 2014 visitation among paid accommodations guests was up significantly from 2013, however visitors staying with friends or relatives was down by 8.1%. The net result was a modest increase in total visitation from the prior year.

Estimated Visitation	Spring 2013	Spring 2014	% Change
Paid Accommodations	734,693	836,684	13.9%
Friends/Relatives	575,541	528,927	-8.1%
Total Visitation	1,310,234	1,365,611	4.2%

Visitor Expenditures

- Spring 2014 visitors spent an estimated \$684.3 million during their stay in Lee County, nearly a 3% increase from last spring (\$666.5 million).
- Expenditures among spring 2014 paid accommodations guests amounted to \$439.8 million (64% of the total), providing an increase of 8.7% year-over-year. Those staying with friends or relatives contributed the remaining \$244.5 million – a decline from the previous year due to the decrease in number of visitors.

Estimated Expenditures	Spring 2013	Spring 2014	% Change
Paid Accommodations	\$404,671,903	\$439,766,340	8.7%
Friends/Relatives	\$261,850,892	\$244,510,583	-6.6%
Total Expenditures	\$666,522,795	\$684,276,923	2.7%

Note: Spring season refers to the period including April, May, and June when referenced throughout this report.

Visitor Origin

- Similar to last year, eight in ten spring 2014 visitors staying in paid accommodations are from points of origin within the United States (81%). The majority of international visitors staying in paid accommodations came from Germany (8%), followed by Canada (5%) and the UK (3%).
- Half of domestic paid accommodations guests came from the Midwest (51%). The other half arrived from the Northeast (24%), the South (22%) and a small minority of guests came from the West (2%).
- During spring 2014, the Lee County lodging industry drew the largest proportion of its domestic visitors from the Chicago, Indianapolis, New York, and Boston DMAs.

Spring 2014 Top DMAs (Paid Accommodations)		
Chicago	7%	44,918
Indianapolis	6%	41,923
New York	6%	40,426
Boston	6%	37,432
Detroit	4%	28,448
Minneapolis-Saint Paul	4%	28,448
Cincinnati	3%	22,459
Milwaukee	3%	20,962
Columbus, OH	3%	19,464
Philadelphia	3%	17,967
Kansas City	2%	16,470

Visitors Staying in Paid Accommodations					
Spring Season	%		Visitor Estimates		% Change
	2013	2014	2013	2014	
Country of Origin					
United States	82%	81%	599,326	675,266	12.7%
Germany	7%	8%	48,033	65,912	37.2%
Canada	3%	5%	25,108	37,664	50.0%
UK	3%	3%	19,650	24,213	23.2%
Switzerland	1%	1%	6,550	10,761	64.3%
Scandinavia	2%	1%	13,100	6,726	-48.7%
BeNeLux	<1%	1%	3,275	5,381	64.3%
France	1%	<1%	6,550	2,690	-58.9%
Austria	<1%	<1%	3,275	1,345	-58.9%
Ireland	<1%	-	1,092	-	-
Other International	1%	1%	7,642	6,726	-12.0%
No Answer	<1%	-	1,092	-	-

Visitors Staying in Paid Accommodations					
Spring Season	%		Visitor Estimates		% Change
	2013	2014	2013	2014	
U.S. Region of Origin					
Florida	9%	6%	52,400	38,929	-25.7%
South (including Florida)	23%	22%	139,734	149,726	7.2%
Midwest	50%	51%	301,301	345,868	14.8%
Northeast	20%	24%	121,175	164,699	35.9%
West	2%	2%	10,917	14,973	37.2%
No Answer	4%	-	26,200	-	-

Note: The percentage of visitors by origin market is based on data collected from visitors in the Visitor Profile Survey. For 2014 estimates, respondents who did not answer the area of residence questions are excluded when calculating these percentages.

Trip Planning

- Comparable to last year, spring 2014 visitors planned their Lee County trip well in advance. Nearly eight in ten began talking about their Lee County trip *three or more months* in advance and seven in ten chose the destination within that timeframe. Additionally, six in ten made their lodging reservations within this timeframe, a slight increase from spring 2013.
 - 78% started talking about trip 3+ months in advance (vs. 79% in 2013)
 - 71% chose Lee County for trip (vs. 72% in 2013)
 - 64% made lodging reservation (vs. 59% in 2013)
- The internet continues to be a key trip planning tool, with nine in ten 2014 Lee County spring visitors indicating they have visited one or more websites during their planning. Nearly half claim to have visited airline websites (45%). Secondly, far fewer mention using search engine (28%), booking (27%) or hotel (25%) websites when preparing for their trip.
- Six in ten spring 2014 visitors indicated they use their laptop to access destination planning information online (60%), and four in ten use their desktop (43%). Accessing this online content with mobile devices is on the rise, with half of spring 2014 visitors claiming to do so on a smartphone (50% vs. 44% in 2013), and a sizeable minority saying they use a tablet (42% vs. 35% in 2013).
- Spring 2014 visitors most frequently cited *warm weather* (88%), *peaceful/relaxing* (85%), and *white sandy beaches* (82%) as the attributes of the destination that positively influenced their selection of Lee County for their trip. A *safe destination* (75%) and *clean, unspoiled environment* (74%) were also influential in selecting this destination.

Visitor Profile

- As observed last year, most visitors flew to the area as their primary mode of transportation, but a modestly higher proportion reported doing so this year (77% vs. 70% in 2013). Southwest Florida International Airport continued to be the airport of choice among air travelers (86% vs. 82% in 2013)
- Spring visitors stayed in Lee County for about 8 or 9 days, and the majority said they came to Lee County for a vacation trip (89%). Three-quarters were repeat visitors (73%) who averaged four or five trips to Lee County in the past five years.
- Among the visitors surveyed, not quite half indicated they were staying in condo/vacation home properties (45%), most of which were paid rentals. Somewhat fewer said they were staying in hotel/motel/resort properties (37%). Half of paid accommodation guests reported that the quality of their lodgings *met expectations* (51%) and an additional 44% said their accommodations *far exceeded or exceeded expectations*.

Visitor Profile (cont'd)

- Visitors engaged in a variety of activities while enjoying their spring 2014 trip in Lee County, the most prevalent of which included: *beaches* (92%), *relaxing* (77%), *dining out* (71%), and to a lesser extent, *swimming* (62%) and *shopping* (53%). Nearly half of visitors took a day trip outside of Lee County (45%), and those that did were most likely to visit Naples.
- Visitors gave very positive feedback regarding satisfaction with their stay in Lee County. Practically all spring 2014 visitors said they were either *very satisfied* or *satisfied* with their visit (64% and 31% respectively). Further, nine in ten reported they intend to return to Lee County (87%), with more than half suggesting they will do so next year (54%). Similarly, the destination is likely to reap rewards from positive word-of-mouth given the high proportion who indicated they will recommend Lee County over other vacation areas in Florida (89%).
- When asked what they liked *least* about the area, one-third of spring 2014 visitors cited *traffic* (33%) – similar to last year (29%) – followed by *insects* at a much lower level (17%).
- The demographic composition of spring 2014 visitors can be summarized as follows:
 - 51 years of age on average
 - \$110,500 household income on average
 - 71% married
 - 42% traveling as a family
 - 34% traveling as a couple
 - 31% traveling *with* children
 - 3 to 4 people in travel party on average

Lodging Industry Assessments

- For the Lee County lodging industry in total, *available* room nights showed no real change from spring 2013 to 2014, however, *occupied* room nights increased 4.7%. The hotel/motel/resort and condo/vacation home categories saw slight to moderate decreases in available room nights (0.7% and 3.6% respectively) while RV parks/campgrounds saw an increase (8.3%). All property categories experienced growth in *occupied* room nights.

Spring Season	Occupied Room Nights			Available Room Nights		
	2013	2014	% Change	2013	2014	% Change
Hotel/Motel/Resort/B&B	648,356	675,936	4.3%	1,022,497	1,015,370	-0.7%
Condo/Cottage/Vacation Home	275,190	296,861	7.9%	431,612	415,899	-3.6%
RV Park/Campground	168,477	170,430	1.2%	460,960	499,441	8.3%
Total	1,092,023	1,143,227	4.7%	1,915,069	1,930,710	0.8%

- Consequently, the industry-wide average occupancy rate in Lee County increased from 57.0% in spring 2013 to 59.2% this spring (+3.9%). While hotels/motels/resorts and condos/vacation homes experienced substantial growth in occupancy rate, RV parks/campgrounds experienced a decrease (-6.5%) when compared to last spring.
- Lee County's average daily rate increased 6.4% year-over-year. The hotel/motel/resort category posted a strong increase in ADR versus last spring, while RV park/campground properties saw a slight increase in ADR and condos/vacation homes saw no change.
- The increases in both average occupancy rate and ADR for the Lee County lodging industry produced a positive shift in RevPAR from spring 2013 to spring 2014 (+10.5%). Year-over-year RevPAR performance was very favorable for hotels/motels/resorts and condos/vacation homes, but RV parks/campgrounds realized a decrease from last spring.

Spring Season	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2013	2014	% Change	2013	2014	% Change	2013	2014	% Change
Hotel/Motel/Resort/B&B	63.4%	66.6%	5.0%	\$131.53	\$143.90	9.4%	\$83.40	\$95.80	14.9%
Condo/Cottage/Vacation Home	63.8%	71.4%	11.9%	\$161.18	\$161.01	-0.1%	\$102.77	\$114.93	11.8%
RV Park/Campground	36.5%	34.1%	-6.5%	\$42.74	\$43.39	1.5%	\$15.62	\$14.81	-5.2%
AVERAGE	57.0%	59.2%	3.9%	\$125.30	\$133.36	6.4%	\$71.45	\$78.97	10.5%

Lodging Industry Assessments (cont'd)

- According to reports from Lee County property managers, bookings for summer season 2014 (July, August, and September) suggest business will be strong. Six in ten property managers responding in early July 2014 noted that their total level of reservations for July, August, and September were up compared with the same period last year (61% vs. 37% in 2013). Another quarter said reservations are on par with the same period last year (27%), and very few claimed that their reservations are down (10%). Comparatively, property managers responded less favorably in July 2013.

Spring 2014 Lee County Snapshot

Total Visitation				
Spring Season	%		Visitor Estimates	
	2013	2014	2013	2014
Paid Accommodations	56%	61%	734,693	836,684
Friends/Relatives	44%	39%	575,541	528,927
Total Visitation			1,310,234	1,365,611

Total Visitor Expenditures			
Spring Season	2013	2014	% Change
Total Visitor Expenditures	\$666,522,795	\$684,276,923	2.7%
Paid Accommodations	\$404,671,903	\$439,766,340	8.7%

Visitor Origin - Visitors Staying in Paid Accommodations				
Spring Season	%		Visitor Estimates	
	2013	2014	2013	2014
Florida	9%	6%	52,400	38,929
United States	82%	81%	599,326	675,266
Germany	7%	8%	48,033	65,912
Canada	3%	5%	25,108	37,664
UK	3%	3%	19,650	24,213
Other International	6%	4%	41,483	33,629
No Answer	<1%	-	1,092	-

First-Time/Repeat Visitors to Lee County		
Spring Season	2013	2014
First-time	25%	25%
Repeat	74%	73%

Spring Season	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2013	2014	% Change	2013	2014	% Change	2013	2014	% Change
Hotel/Motel/Resort/B&B	63.4%	66.6%	5.0%	\$131.53	\$143.90	9.4%	\$83.40	\$95.80	14.9%
Condo/Cottage/Vacation Home	63.8%	71.4%	11.9%	\$161.18	\$161.01	-0.1%	\$102.77	\$114.93	11.8%
RV Park/Campground	36.5%	34.1%	-6.5%	\$42.74	\$43.39	1.5%	\$15.62	\$14.81	-5.2%
AVERAGE	57.0%	59.2%	3.9%	\$125.30	\$133.36	6.4%	\$71.45	\$78.97	10.5%

Calendar YTD 2014 Lee County Snapshot

Total Calendar Year Visitation				
	%		Visitor Estimates	
	2013	2014	2013	2014
Paid Accommodations	54%	58%	1,466,960	1,614,223
Friends/Relatives	46%	42%	1,241,592	1,171,386
Total Visitation			2,708,552	2,785,609

Total Visitor Expenditures			
	2013	2014	% Change
Total Visitor Expenditures	\$1,716,571,008	\$1,758,986,730	2.5%
Paid Accommodations	\$1,141,644,386	\$1,203,085,669	5.4%

Visitor Origin - Visitors Staying in Paid Accommodations				
	%		Visitor Estimates	
	2013	2014	2013	2014
Florida	5%	4%	61,535	51,193
US	81%	83%	1,182,359	1,335,175
Canada	6%	6%	87,908	91,348
Germany	6%	5%	85,710	83,839
UK	3%	<1%	36,262	33,786
Other International	5%	6%	69,227	70,075
No Answer	<1%	-	5,494	-

First-Time/Repeat Visitors to Lee County		
	2013	2014
First-time	25%	25%
Repeat	74%	73%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2013	2014	% Change	2013	2014	% Change	2013	2014	% Change
Hotel/Motel/Resort/B&B	72.6%	75.2%	3.7%	\$155.17	\$167.31	7.8%	\$112.58	\$125.88	11.8%
Condo/Cottage/Vacation Home	74.2%	78.1%	5.2%	\$187.86	\$202.12	7.6%	\$139.40	\$157.77	13.2%
RV Park/Campground	62.8%	61.2%	-2.6%	\$51.95	\$54.99	5.8%	\$32.63	\$33.65	3.1%
AVERAGE	70.6%	72.4%	2.5%	\$141.01	\$151.92	7.7%	\$99.53	\$109.94	10.5%

Visitor Profile Analysis Spring 2014

A total of 916 interviews were conducted with visitors in Lee County during the spring months of April, May, and June 2014. A total sample of this size is considered accurate to plus or minus 3.2 percentage points at the 95% confidence level.

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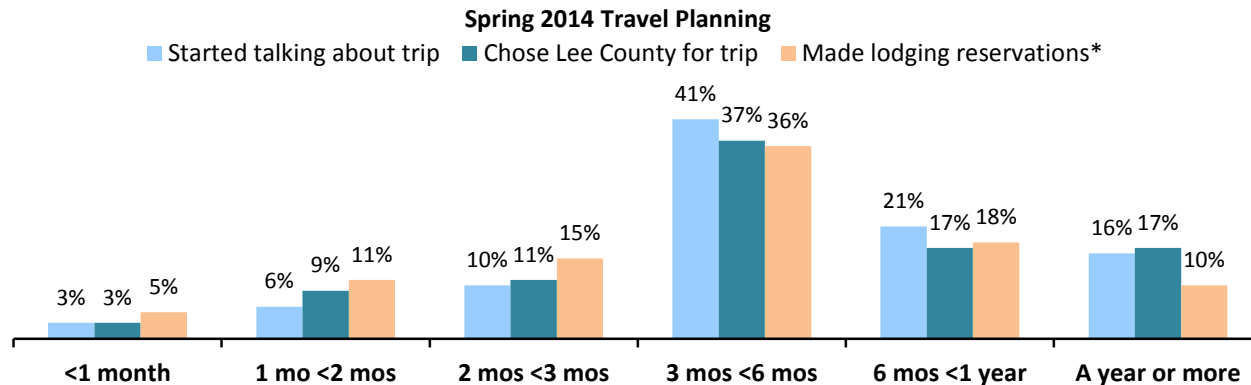
Travel Planning

Spring Season	Started Talking About Trip		Chose Lee County for Trip		Made Lodging Reservations	
	2013	2014	2013	2014	2013	2014
	A	B	A	B	A	B
Total Respondents	915	916	915	916	673*	625*
<u>Less than 3 months (NET)</u>	<u>18%</u>	<u>19%</u>	<u>23%</u>	24%	<u>36%</u>	<u>31%</u>
<1 month	4%	3%	5%	3%	6%	5%
1 month - <2 months	6%	6%	8%	9%	11%	11%
2 months - <3 months	8%	10%	11%	11%	18%	15%
<u>3 months or more (NET)</u>	<u>79%</u>	<u>78%</u>	<u>72%</u>	<u>71%</u>	<u>59%</u>	<u>64%a</u>
3 months - <6 months	40%	41%	37%	37%	34%	36%
6 months - <1 year	21%	21%	17%	17%	16%	18%
A year or more	19%	16%	19%	17%	9%	10%
No Lodging Reservations Made	-	-	-	-	4%	3%
No Answer	3%	3%	4%	5%	2%	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		
Spring Season	2013	2014
	A	B
Total Respondents	915	916
<u>Any (NET)</u>	<u>96%</u>	<u>96%</u>
Laptop computer	64% ^b	60%
Desktop computer	46%	43%
Smartphone (iPhone, Blackberry, etc.)	44%	50% ^a
Tablet (iPad, etc.)	35%	42% ^a
E-Reader (Nook, Kindle, etc.)	5%	6%
Other portable device	1%	1%
None of these	3%	4%
No Answer	1%	<1%

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

Travel Websites Visited		
Spring Season	2013	2014
	A	B
Respondents who used a device to plan	882	880
<u>Visited web sites (net)</u>	<u>88%</u>	<u>89%</u>
Airline websites	39%	45% ^a
Search Engines	35% ^b	28%
Booking websites	26%	27%
Hotel websites	29%	25%
Vacation rental websites*	n/a	24%
Trip Advisor	22%	23%
www.FortMyers-Sanibel.com	18% ^b	13%
Visit Florida	9%	7%
AAA	8%	7%
Facebook	5%	7%
Other	15% ^b	9%
None/Didn't visit websites	11%	10%
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.

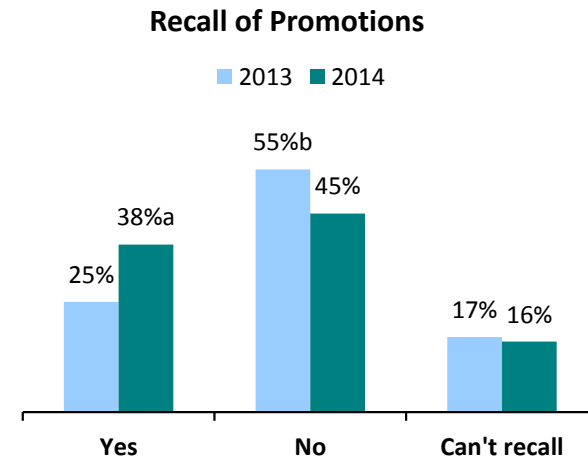
Travel Planning

Travel Information Requested		
Spring Season	2013	2014
	A	B
Total Respondents	915	916
<u>Requested information (NET)</u>	<u>33%</u>	<u>30%</u>
Hotel Web Site	17%	15%
VCB website	8%	8%
Call hotel	9%	7%
Visitor Guide	4%	4%
E-Newsletter	1%	1%
Call VCB	<1%	1%
Call Local Chamber of Commerce	1% ^b	<1%
Magazine Reader Service Card	<1%	<1%
Other	7%	9%
<u>None/Did not request information</u>	<u>64%</u>	<u>65%</u>
No Answer	3%	4%

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

Recall of Lee County Promotions		
Spring Season	2013	2014
	A	B
Total Respondents	915	916
Yes	25%	38% ^a
No	55% ^b	45%
Can't Recall	17%	16%

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



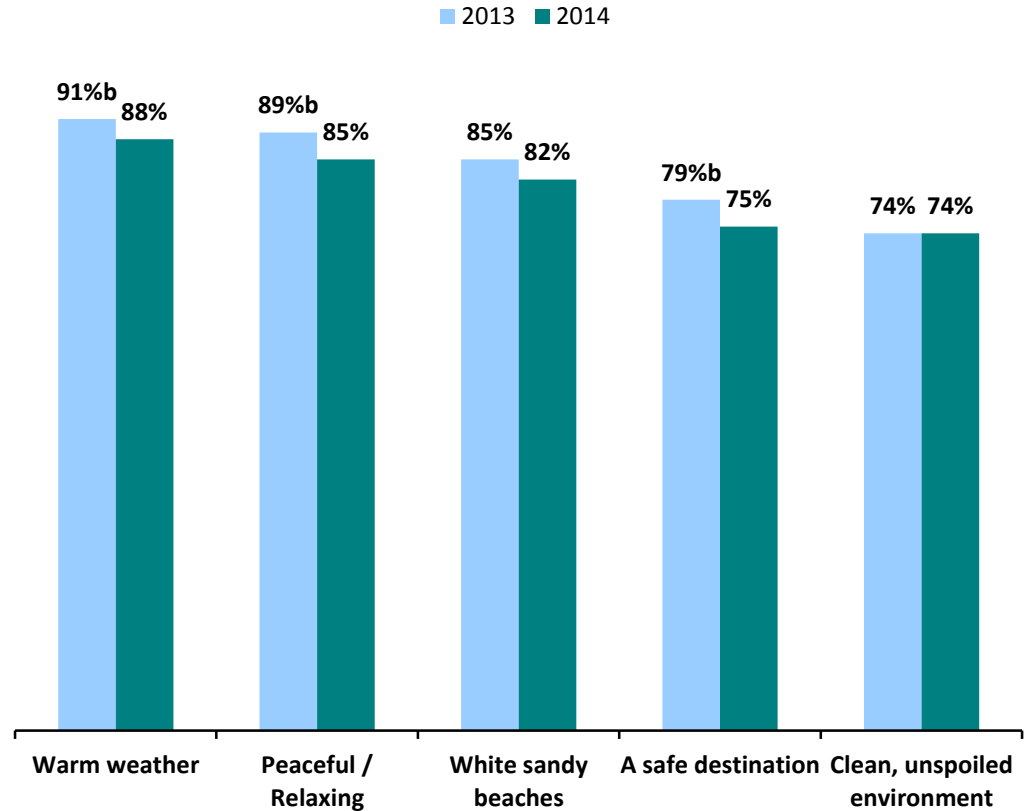
Travel Planning

Travel Decision Influences*		
Spring Season	2013	2014
	A	B
Total Respondents	915	916
Warm weather	91% ^b	88%
Peaceful / Relaxing	89% ^b	85%
White sandy beaches	85%	82%
A safe destination	79% ^b	75%
Clean, unspoiled environment	74%	74%
Convenient location	67%	67%
Good value for the money	69%	65%
A "family" atmosphere	63%	62%
Plenty to see and do	62%	59%
Reasonably priced lodging	63% ^b	58%
Upscale accommodations	57%	56%
Affordable dining	56%	54%

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		
Spring Season	2013	2014
	A	B
Total Respondents	915	916
Fly	70%	77%a
Drive a personal vehicle	24%b	18%
Drive a rental vehicle	4%	4%
Drive an RV	1%	1%
Travel by bus	<1%	<1%
Other/No Answer	1%	<1%

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

Frequency of Using SWFL Int'l (Past Year)		
Spring Season	2013	2014
	A	B
Total Respondents	915	916
<u>One or more trips</u>	<u>54%</u>	<u>63%a</u>
1 trip	35%	45%a
2 to 3 trips	14%	13%
4 to 5 trips	3%	2%
6 or more trips	2%	3%
None/No Answer	46%b	37%

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

Airport Used		
Spring Season	2013	2014
	A	B
Respondents who flew into the area	639	702
SW Florida Int'l (Fort Myers)	82%	86%
Punta Gorda	n/a	4%
Miami Int'l	3%	3%
Ft. Lauderdale Int'l	3%	3%
Orlando Int'l	5%b	2%
Tampa Int'l	3%	2%
West Palm Beach Int'l	<1%	n/a
Other	4%b	<1%
No Answer	1%	<1%

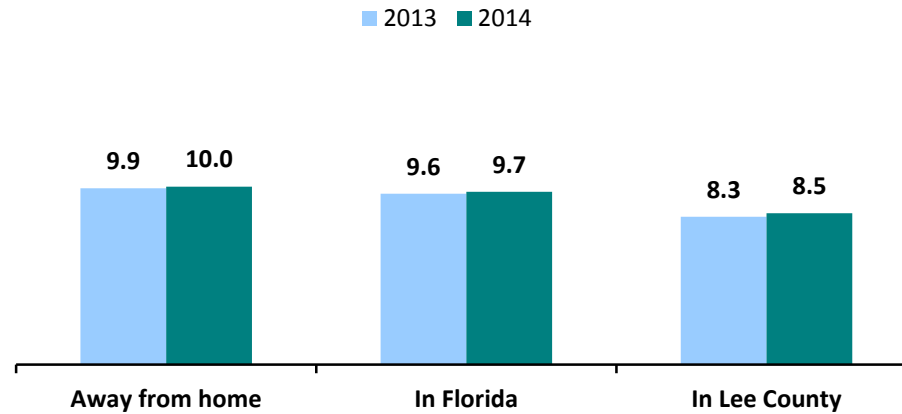
Q2: At which Florida airport did you land?

Trip Profile

Trip Length Mean # of Days		
Spring Season	2013	2014
	A	B
Total Respondents	915	916
Away from home	9.9	10.0
In Florida	9.6	9.7
In Lee County	8.3	8.5

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

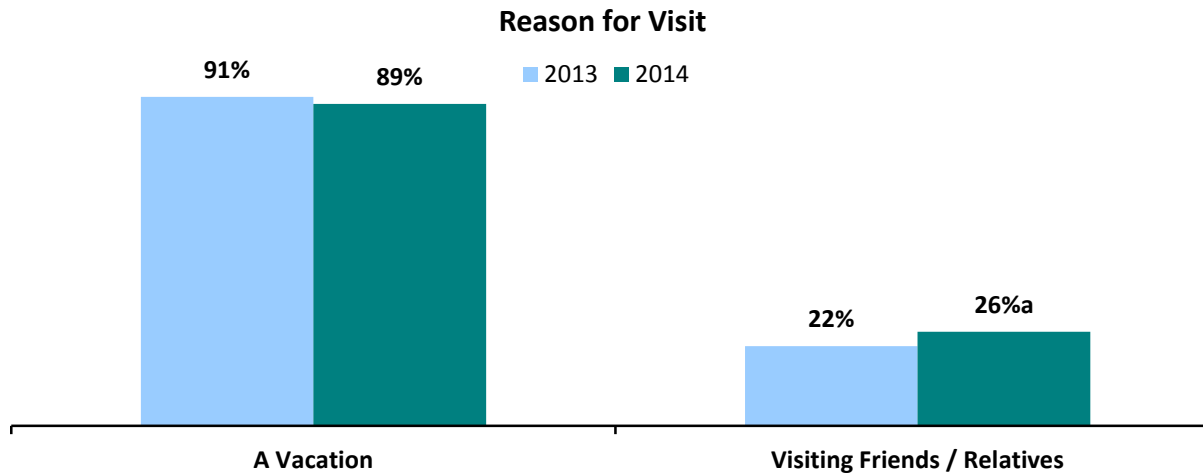
Trip Length (mean # of days)



Trip Profile

Reason(s) for Visit		
Spring Season	2013	2014
	A	B
Total Respondents	915	916
A Vacation	91%	89%
Visiting Friends / Relatives	22%	26% ^a
Sporting Event(s)	1%	2%
Personal Business	1%	1%
Other Business Trip	1%	1%
A Conference / Meeting	1%	<1%
A Convention / Trade Show	<1%	-
Other/No Answer (NET)	<1%	2% ^a

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



Trip Profile

First Time Visitors to Lee County								
Spring 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	915	916	61*	35*	651	611	165	185
First-time visitor	25%	25%	7%	17%	25%	27%	35%	30%
Repeat visitor	74%	73%	93%	81%	75%	72%	62%	69%
No Answer	1%	2%	-	3%	<1%	1%a	3%	2%

Q15: Is this your first visit to Lee County?

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

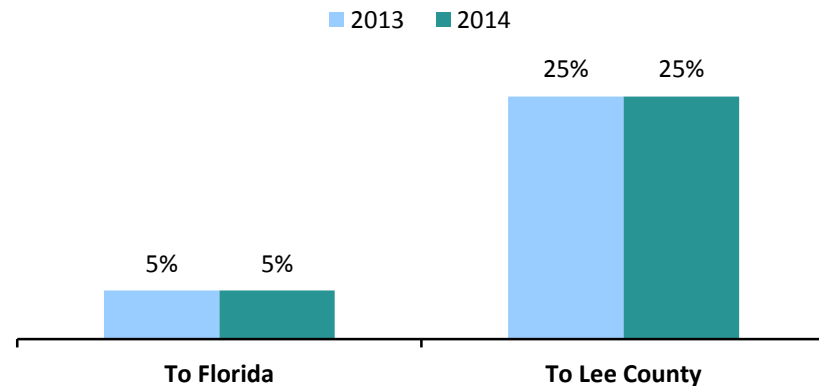
**N/A: Insufficient number of responses for statistical analysis (N<30).

First Time Visitors to Florida		
Spring Season	2013	2014
Total Respondents	915	916
	A	B
Yes, first-time visitor	5%	5%
No	87%	90%
No answer	<1%	1%
<i>FL Residents*</i>	7%b	4%

Q13: Is this your first visit to Florida?

*Florida residents are shown as a proportion of total visitor interviews conducted, though FL residents are not asked this question .

First Time Visitors



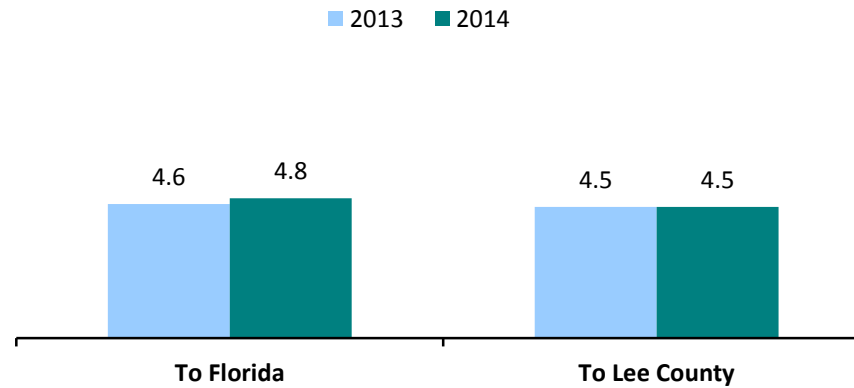
Trip Profile

Previous Visits in Five Years				
Spring Season	Mean # of Visits to Florida		Mean # of Visits to Lee County	
	2013	2014	2013	2014
	A	B	A	B
Base: Repeat Visitors	800 (FL res. Excl)	821 (FL res. Excl)	678	668
Number of visits	4.6	4.8	4.5	4.5

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?

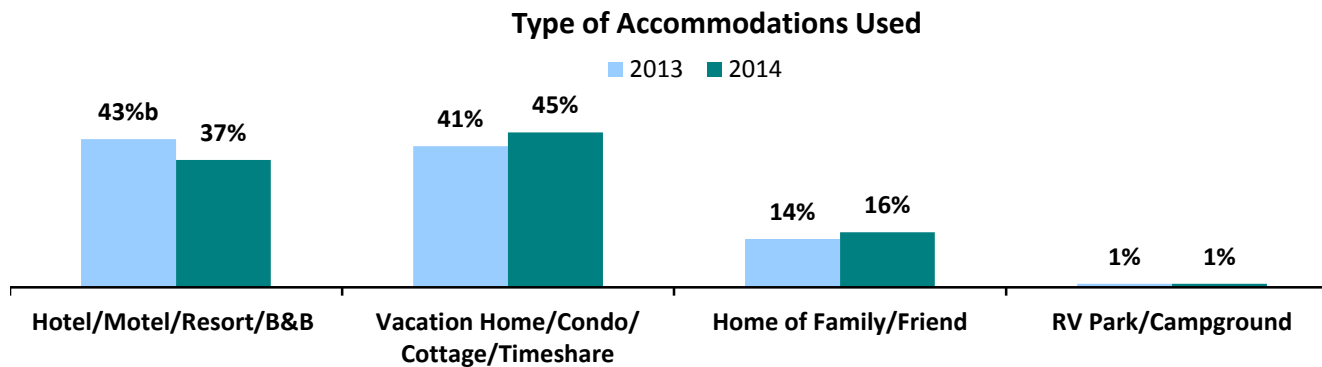
Previous Visits in Five Years



Trip Profile

Type of Accommodations Used		
Spring Season	2013	2014
	A	B
Total Respondents	915	916
<u>Hotel/Motel/Resort/B&B (NET)</u>	<u>43%^b</u>	<u>37%</u>
Hotel/motel/historic inn	21%	20%
Resort	22% ^b	17%
Bed and Breakfast	<1%	<1%
<u>Vacation Home/Condo/Cottage/Timeshare (NET)</u>	<u>41%</u>	<u>45%</u>
Rented	29%	30%
Owned	8%	9%
Borrowed	4%	5%
<u>RV Park/Campground (NET)</u>	<u>1%</u>	<u>1%</u>
Home of family or a friend	14%	16%
Daytripper (No Accommodations)	1%	2%

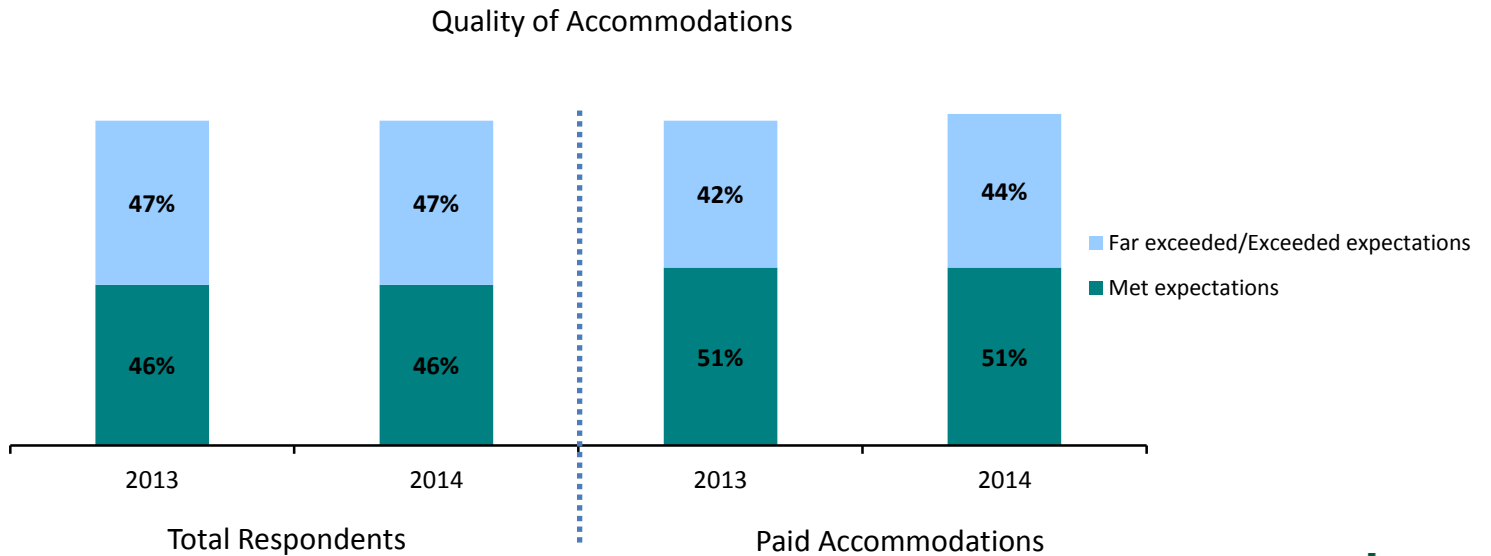
Q20: Are you staying overnight (either last night or tonight):



Trip Profile

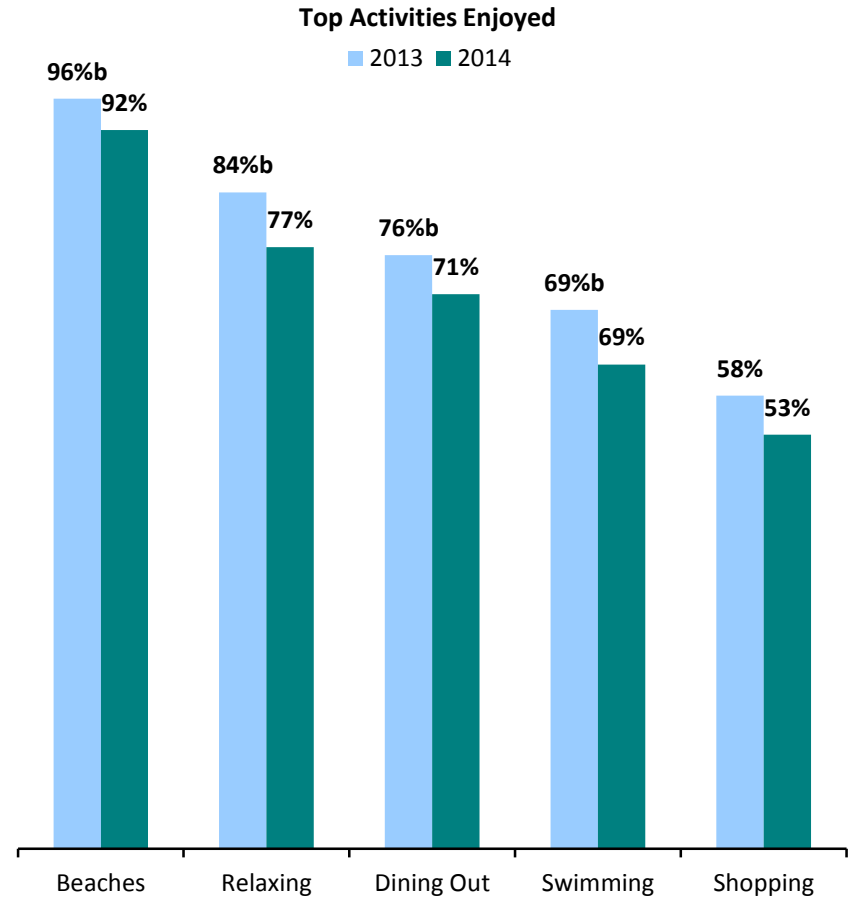
Quality of Accommodations				
	Total Respondents		Paid Accommodations	
Spring Season	2013	2014	2013	2014
	A	B	A	B
Respondents	915	916	673	625
Far exceeded/Exceeded expectations	47%	47%	42%	44%
Met your expectations	46%	46%	51%	51%
Did not meet/Far below expectations	3%	2%	3%	3%
No Answer	4%	5%	3% ^b	2%

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



Trip Activities

Activities Enjoyed		
Spring Season	2013	2014
	A	B
Total Respondents	915	916
Beaches	96% ^b	92%
Relaxing	84% ^b	77%
Dining Out	76% ^b	71%
Swimming	69% ^b	62%
Shopping	58%	53%
Shelling	47% ^b	38%
Sightseeing	34%	33%
Visiting Friends/Relatives	27%	25%
Attractions	24%	25%
Watching Wildlife	25%	21%
Photography	18%	18%
Exercise / Working Out	17%	17%
Bicycle Riding	19%	17%
Fishing	11%	14%
Bars / Nightlife	15%	14%
Birdwatching	15%	13%
Boating	11%	12%
Golfing	8%	9%
Miniature Golf	7%	8%
Kayaking / Canoeing	8%	7%
Guided Tour	5%	7%
Parasailing / Jet Skiing	8%	6%
Sporting Event	3%	5% ^a
Tennis	6%	5%
Cultural Events	3%	4%
Scuba Diving / Snorkeling	2%	2%
Other	3%	3%
No Answer	<1%	1%



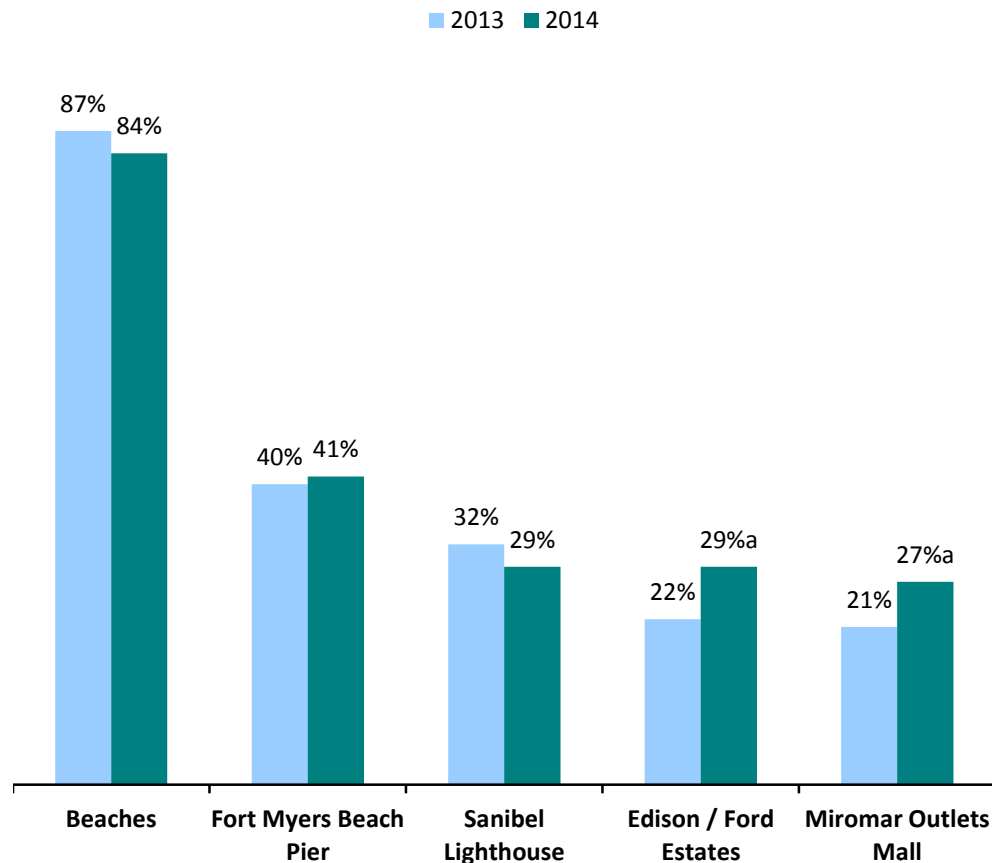
Q23: What activities or interests are you enjoying while in Lee County?
(Please mark ALL that apply.)

Trip Activities

Attractions Visited		
Spring Season	2013	2014
	A	B
Total Respondents	915	916
Beaches	87%	84%
Fort Myers Beach Pier	40%	41%
Sanibel Lighthouse	32%	29%
Edison / Ford Estates	22%	29%a
Miromar Outlets Mall	21%	27%a
Tanger Outlet Center	27%b	22%
Ding Darling National Wildlife Refuge	17%	18%
Periwinkle Place	20%b	13%
Coconut Point Mall	12%	13%
Shell Factory and Nature Park	8%	11%a
Bell Tower Shops	11%	10%
Edison Mall	9%	8%
Gulf Coast Town Center	7%	8%
Manatee Park	3%	4%
Bailey-Matthews Shell Museum	4%	4%
Broadway Palm Dinner Theater	1%	2%
Barbara B. Mann Performing Arts Hall	1%	1%
Babcock Wilderness Adventures	<1%	1%
Other	6%	5%
None/No Answer (NET)	3%	3%

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

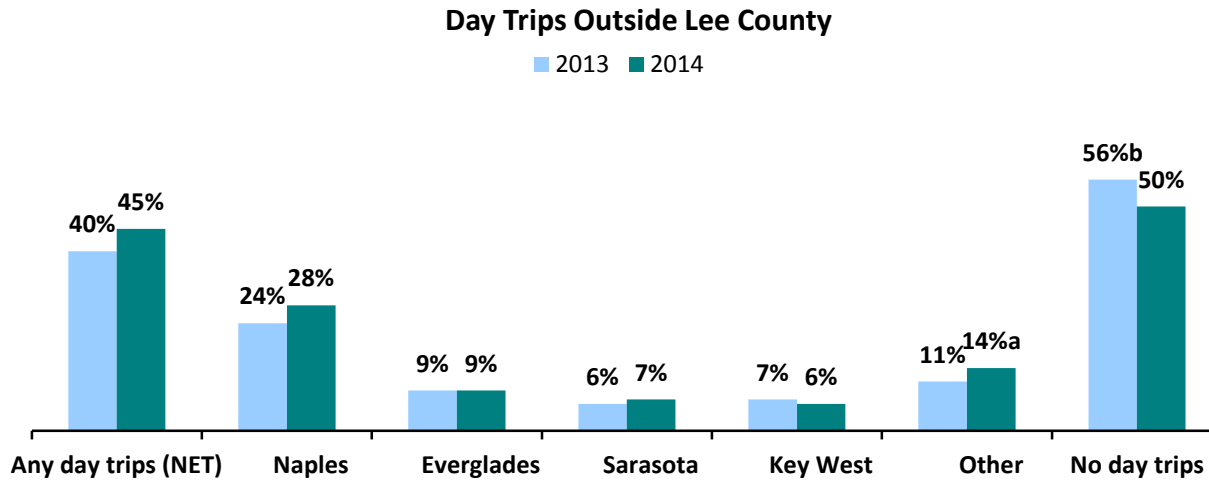
Top Attractions Visited



Trip Activities

Day Trips Outside Lee County		
Spring Season	2013	2014
	A	B
Total Respondents	915	916
<u>Any day trips (NET)</u>	<u>40%</u>	<u>45%</u>
Naples	24%	28%
Everglades	9%	9%
Sarasota	6%	7%
Key West	7%	6%
Other	11%	14%a
<u>No day trips</u>	<u>56%b</u>	<u>50%</u>
No Answer	10%	14%a

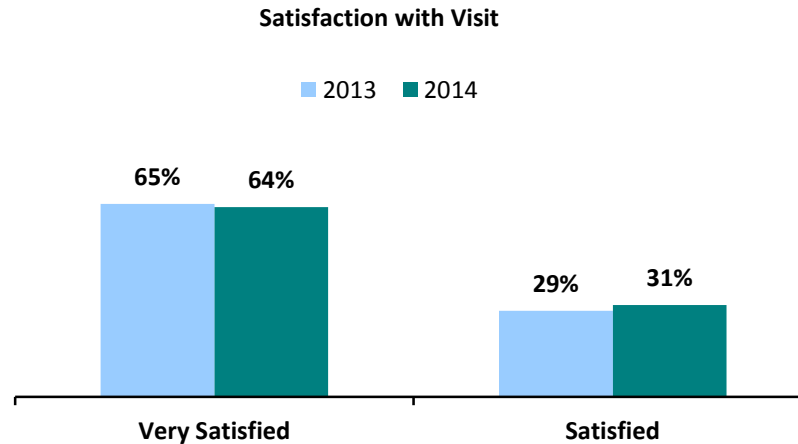
Q25: Where did you go on day trips outside Lee County?



Lee County Experience

Satisfaction with Visit		
Spring Season	2013	2014
	A	B
Total Respondents	915	916
<u>Very Satisfied/Satisfied</u>	<u>94%</u>	<u>95%</u>
<i>Very Satisfied</i>	65%	64%
<i>Satisfied</i>	29%	31%
Neither	2%	1%
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

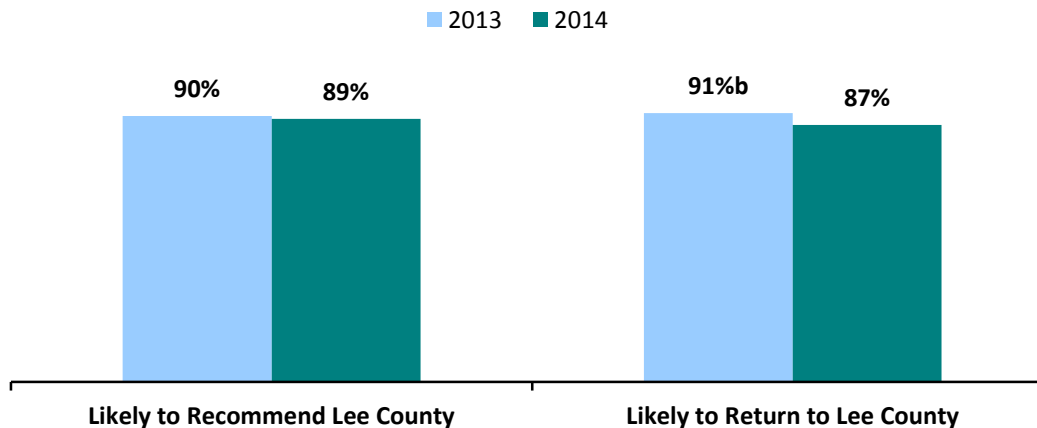
Likelihood to Recommend/Return to Lee County		
Spring Season	2013	2014
	A	B
Total Respondents	915	916
Likely to Recommend Lee County	90%	89%
Likely to Return to Lee County	91%b	87%
Base: Total Respondents Planning to Return	830	799
Likely to Return Next Year	58%	54%

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?

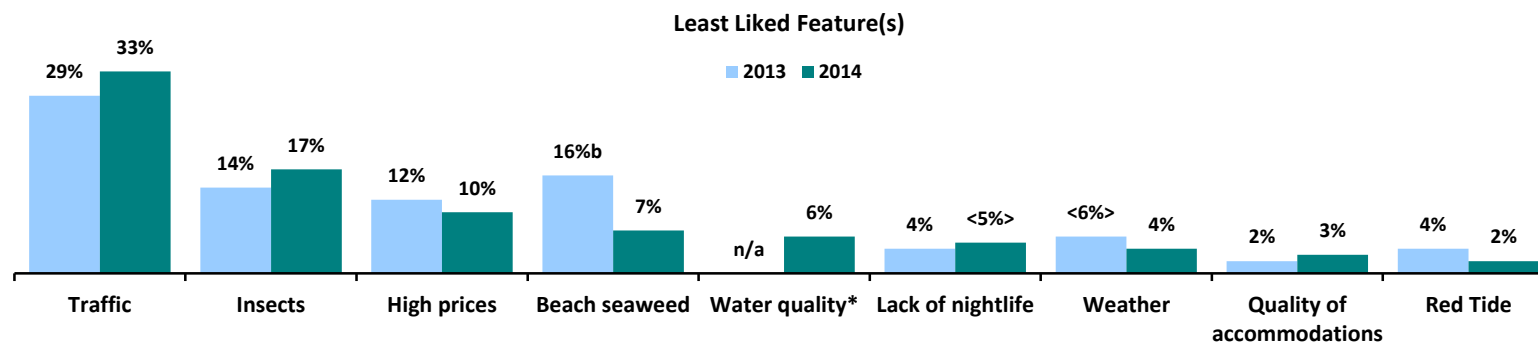
Likelihood to Recommend/Return to Lee County (Responded "Yes")



Trip Activities

Least Liked Features		
Spring Season	2013	2014
	A	B
Total Respondents	915	916
Traffic	29%	33%
Insects	14%	17%
High prices	12%	10%
Beach seaweed	16% ^b	7%
Water quality*	n/a	6%
Lack of nightlife	4%	5%
Weather	6% ^b	4%
Quality of accommodations	2%	3%
Red Tide	4%	2%
Other	5%	5%
Nothing/No Answer (NET)	33%	37%

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



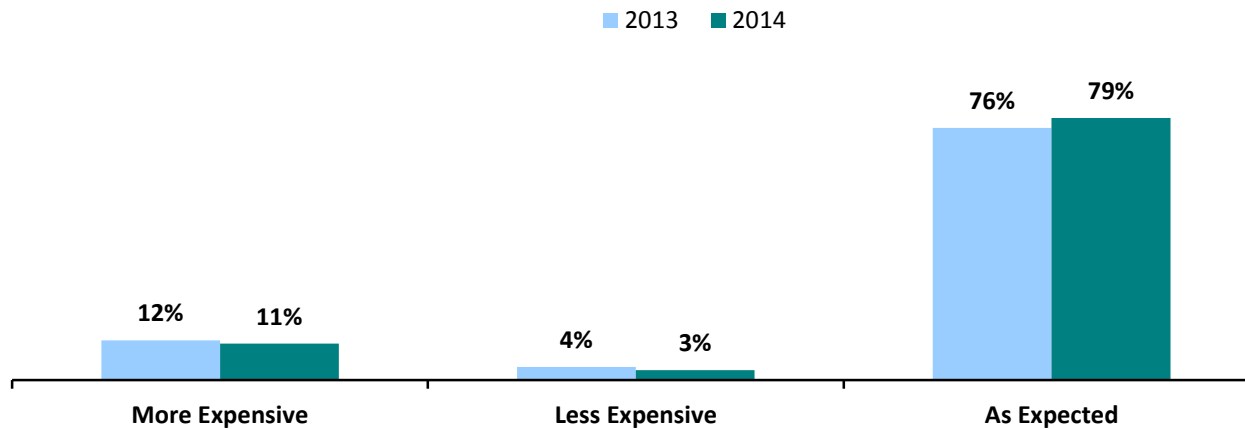
* Note: Response option added in January 2014.

Trip Activities

Perception of Lee County as Expensive		
Spring Season	2013	2014
	A	B
Total Respondents	915	916
More Expensive	12%	11%
Less Expensive	4%	3%
As Expected	76%	79%
Don't know/No Answer (NET)	8%	6%

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

Perception of Lee County as Expensive



Visitor and Travel Party Demographic Profile

Visitor Demographic Profile		
Spring Season	2013	2014
	A	B
Total Respondents	915	916
Age of respondent (mean)	50.1	50.6
Annual household income (mean)	\$111,462	\$110,493
Martial Status		
Married	77% ^b	71%
Single	10%	14% ^a
Other	10%	11%
Vacations per year (mean)	2.8	2.8
Short getaways per year (mean)	3.6	3.7

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		
Spring Season	2013	2014
	A	B
Total Respondents	915	916
Family	46%	42%
Couple	34%	34%
Group of couples/friends	12%	13%
Single	6%	7%
Mean travel party size	3.4	3.5
Mean adults in travel party	2.6	2.8

Q17: On this trip, are you traveling:

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

Travel Parties with Children		
Spring Season	2013	2013
	A	B
Total Respondents	915	916
<u>Traveling with any Children (net)</u>	<u>38%^b</u>	<u>31%</u>
Any younger than 6	12%	13%
Any ages 6-11	18% ^b	14%
Any 12-17 years old	23% ^b	16%
No Children	62%	69% ^a

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		
Spring Season	2013	2014	2013	2014	% Change
Paid Accommodations	56%	61%	734,693	836,684	13.9%
Friends/Relatives	44%	39%	575,541	528,927	-8.1%
Total Visitation			1,310,234	1,365,611	4.2%

Visitor Origin (Paid Accommodation Guests)					
	%		Visitor Estimates		
Spring Season	2013	2014	2013	2014	% Change
Country of Origin	2013	2014	2013	2014	% Change
United States	82%	81%	599,326	675,266	12.7%
Germany	7%	8%	48,033	65,912	37.2%
Canada	3%	5%	25,108	37,664	50.0%
UK	3%	3%	19,650	24,213	23.2%
Switzerland	1%	1%	6,550	10,761	64.3%
Scandinavia	2%	1%	13,100	6,726	-48.7%
BeNeLux	<1%	1%	3,275	5,381	64.3%
France	1%	<1%	6,550	2,690	-58.9%
Austria	<1%	<1%	3,275	1,345	-58.9%
Ireland	<1%	-	1,092	-	-
Other International	1%	1%	7,642	6,726	-12.0%
No Answer	<1%	-	1,092	-	-

U.S. Region of Origin	2013	2014	2013	2014	% Change
Florida	9%	6%	52,400	38,929	-25.7%
South (including Florida)	23%	22%	139,734	149,726	7.2%
Midwest	50%	51%	301,301	345,868	14.8%
Northeast	20%	24%	121,175	164,699	35.9%
West	2%	2%	10,917	14,973	37.2%
No Answer	4%	-	26,200	-	-

Spring 2014 Top DMAs (Paid Accommodations)		
Chicago	7%	44,918
Indianapolis	6%	41,923
New York	6%	40,426
Boston (Manchester, NH)	6%	37,432
Detroit	4%	28,448
Minneapolis-Saint Paul	4%	28,448
Cincinnati	3%	22,459
Milwaukee	3%	20,962
Columbus, OH	3%	19,464
Philadelphia	3%	17,967
Kansas City	2%	16,470

Note: The percentage of visitors by origin market is based on data collected from visitors in the Visitor Profile Survey. For 2014 estimates, respondents who did not answer the area of residence questions are excluded when calculating these percentages.

Occupancy Data Analysis Spring 2014

For the 2014 spring season, property managers were interviewed in July 2014 to provide data for each specific month of the season (April, May, and June 2014).

For the 2013 spring season, property managers were interviewed in July 2013 to provide data for each specific month of the season (April, May, and June 2013).

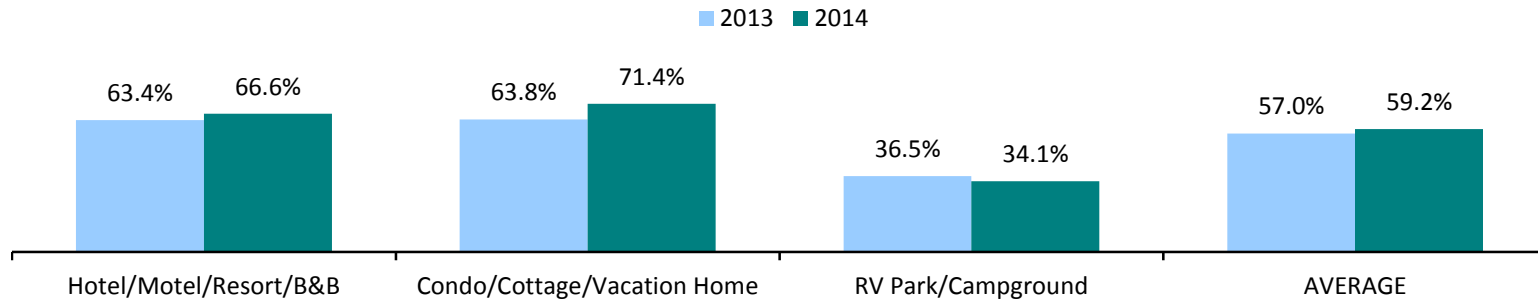
Occupancy/Daily Rates

Spring Season	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2013	2014	% Change	2013	2014	% Change	2013	2014	% Change
Hotel/Motel/Resort/B&B	63.4%	66.6%	5.0%	\$131.53	\$143.90	9.4%	\$83.40	\$95.80	14.9%
Condo/Cottage/Vacation Home	63.8%	71.4%	11.9%	\$161.18	\$161.01	-0.1%	\$102.77	\$114.93	11.8%
RV Park/Campground	36.5%	34.1%	-6.5%	\$42.74	\$43.39	1.5%	\$15.62	\$14.81	-5.2%
AVERAGE	57.0%	59.2%	3.9%	\$125.30	\$133.36	6.4%	\$71.45	\$78.97	10.5%

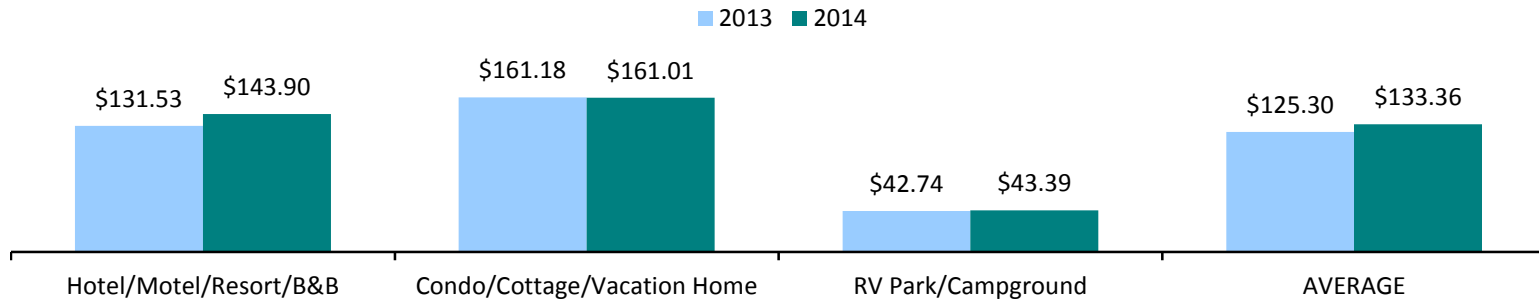
Q16: What was your overall average occupancy rate for the month of [April/May/June]?

Q17: What was your average daily rate (ADR) in [April/May/June]?

Average Occupancy Rate

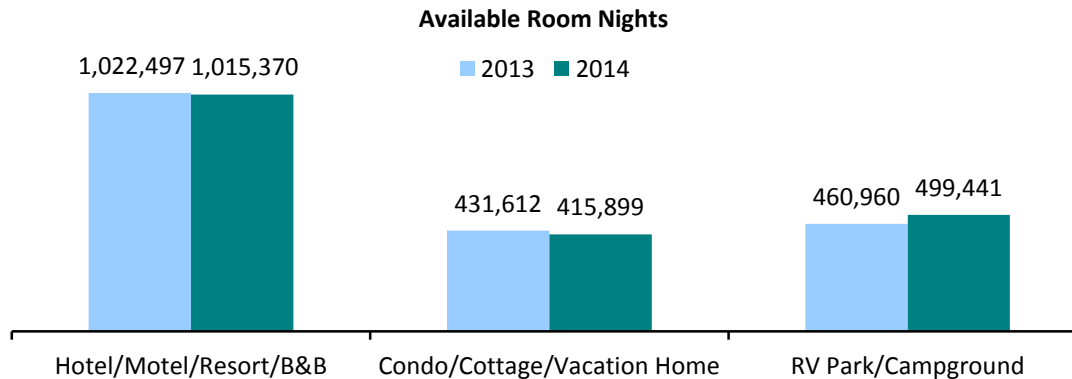
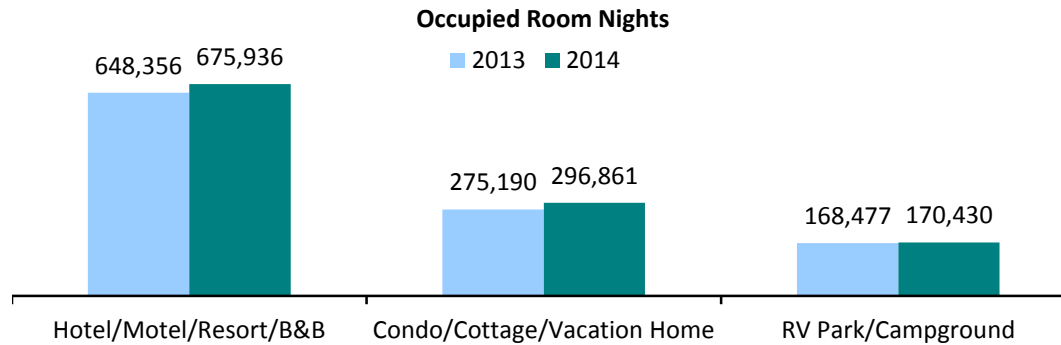


Average Daily Rate



Room/Unit/Site Nights

Spring Season	Occupied Room Nights			Available Room Nights		
	2013	2014	% Change	2013	2014	% Change
Hotel/Motel/Resort/B&B	648,356	675,936	4.3%	1,022,497	1,015,370	-0.7%
Condo/Cottage/Vacation Home	275,190	296,861	7.9%	431,612	415,899	-3.6%
RV Park/Campground	168,477	170,430	1.2%	460,960	499,441	8.3%
Total	1,092,023	1,143,227	4.7%	1,915,069	1,930,710	0.8%

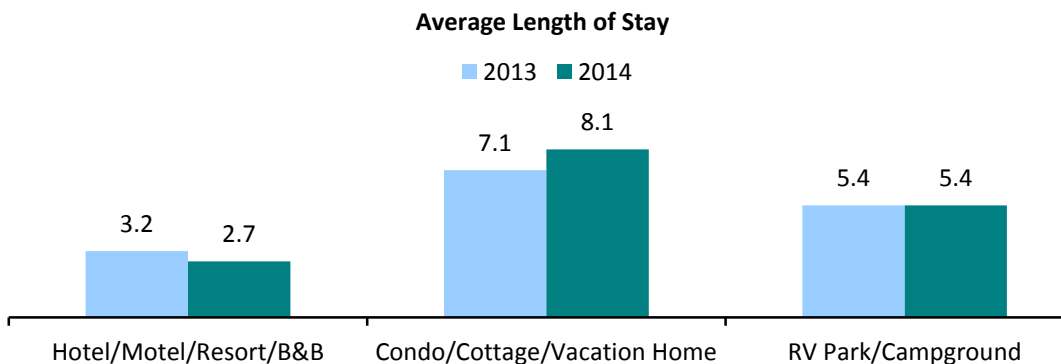
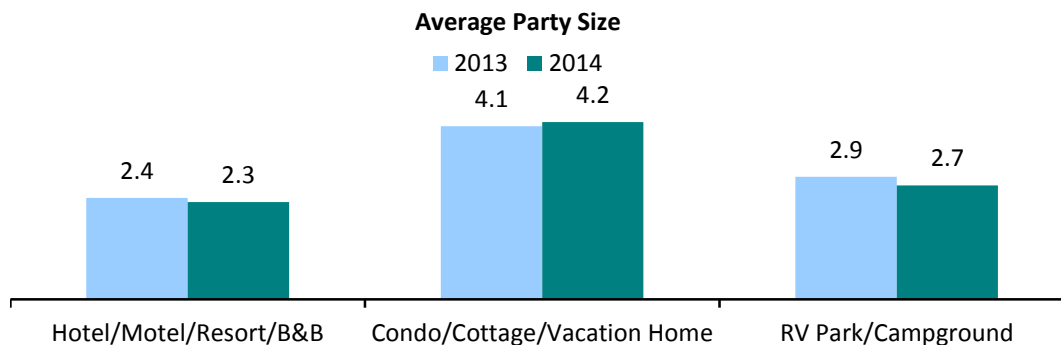


Average Party Size and Length of Stay

Spring Season	Average Party Size			Average Length of Stay		
	2013	2014	% Change	2013	2014	% Change
Hotel/Motel/Resort/B&B	2.4	2.3	-4.2%	3.2	2.7	-15.6%
Condo/Cottage/Vacation Home	4.1	4.2	2.4%	7.1	8.1	14.1%
RV Park/Campground	2.9	2.7	-6.9%	5.4	5.4	0.0%
Average	2.9	2.9	0.0%	4.3	3.9	-9.3%

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

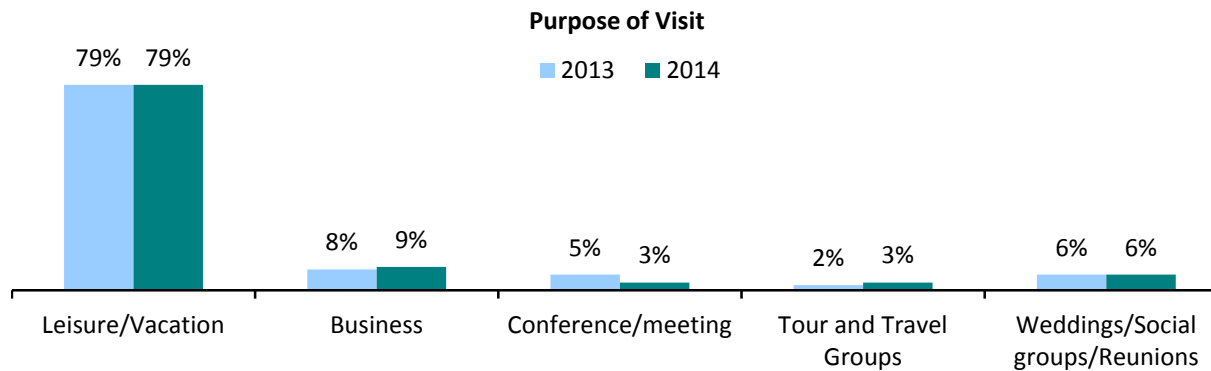
Q19: What was the average length of stay (in nights) of your guests in [April/May/June]?



Lodging Management Estimates

Guest Profile		
Spring Season	2013	2014
	A	B
Total Number of Responses	96	97
<u>Purpose of Visit</u>		
Leisure/Vacation	79%	79%
Business	8%	9%
Conference/meeting	5%	3%
Tour and Travel Groups	2%	3%
Weddings/Social groups/Reunions (net)	6%	6%

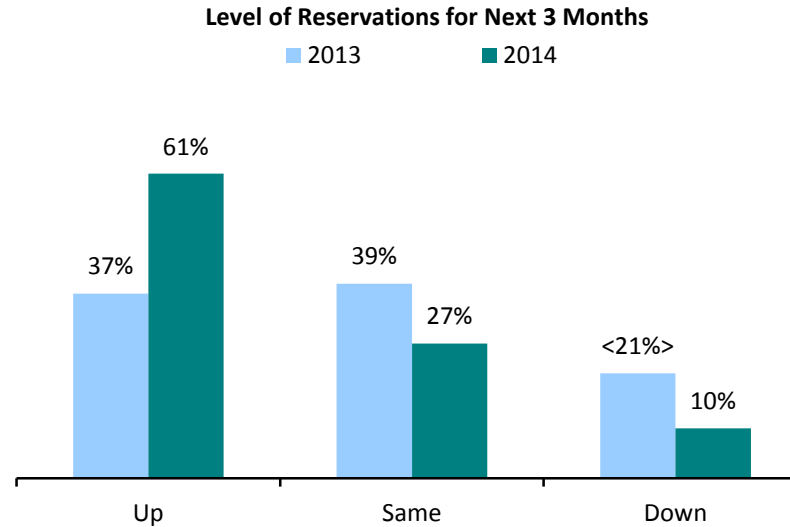
Q22: What percent of your [April/May/June] room/site/unit occupancy do you estimate was generated by:



Occupancy Barometer

Level of Reservations for Next 3 Months Compared to Last Year		
Spring Season	2013	2014
	A	B
Total Respondents	102	101
<u>Up/Same (net)</u>	<u>76%</u>	<u>88%^a</u>
Up	37%	61% ^a
Same	39%	27%
Down	21% ^b	10%

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

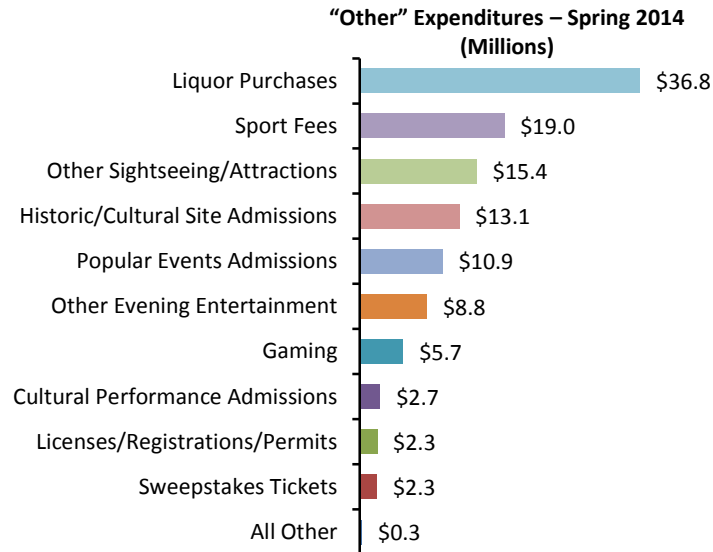


Economic Impact Analysis
Spring 2014

Total Visitor Expenditures by Spending Category

TOTAL EXPENDITURES			
Spring Season	2013	2014	% Change
<u>TOTAL</u>	<u>\$666,522,795</u>	<u>\$684,276,923</u>	<u>2.7%</u>
Food and Beverages	\$175,179,494	\$176,773,367	0.9%
Shopping	\$173,605,999	\$175,202,788	0.9%
Lodging Accommodations	\$136,832,011	\$152,462,491	11.4%
Ground Transportation	\$63,411,577	\$62,513,925	-1.4%
Other	\$117,493,714	\$117,324,352	-0.1%

(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

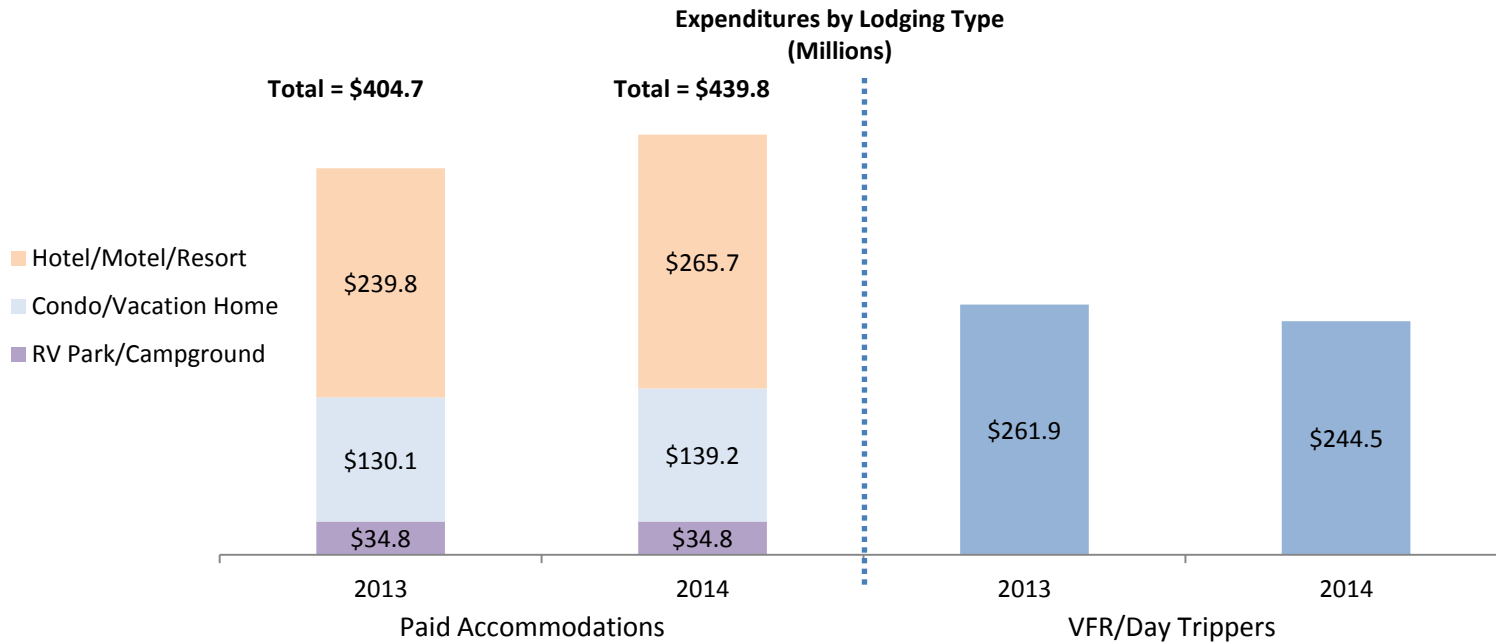
TOTAL EXPENDITURES						
	Staying Paid Accommodations			Visiting Friends and Relatives/Day Trippers		
Spring Season	2013	2014	% Change	2013	2014	% Change
TOTAL	<u>\$404,671,903</u>	<u>\$439,766,340</u>	<u>8.7%</u>	<u>\$261,850,892</u>	<u>\$244,510,583</u>	<u>-6.6%</u>
Lodging Accommodations	\$136,832,011	\$152,462,491	11.4%	\$0	\$0	-
Food and Beverages	\$91,100,211	\$98,317,320	7.9%	\$84,079,283	\$78,456,047	-6.7%
Shopping	\$84,144,302	\$90,344,489	7.4%	\$89,461,697	\$84,858,299	-5.1%
Ground Transportation	\$33,237,405	\$35,170,068	5.8%	\$30,174,172	\$27,343,857	-9.4%
Other	\$59,357,974	\$63,471,972	6.9%	\$58,135,740	\$53,852,380	-7.4%

“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					
Spring Season	2013	2014	% Change	2013	2014
<u>TOTAL</u>	<u>\$666,522,795</u>	<u>\$684,276,923</u>	<u>2.7%</u>	<u>100%</u>	<u>99%</u>
Visiting Friends & Relatives/Day Trippers	\$261,850,892	\$244,510,583	-6.6%	39%	35%
<u>Paid Accommodations</u>	<u>\$404,671,903</u>	<u>\$439,766,340</u>	<u>8.7%</u>	<u>61%</u>	<u>64%</u>
<i>Hotel/Motel/Resort/B&B</i>	<i>\$239,807,998</i>	<i>\$265,692,010</i>	10.8%	36%	39%
<i>Condo/Cottage/Vacation Home</i>	<i>\$130,078,456</i>	<i>\$139,225,870</i>	7.0%	20%	20%
<i>RV Park/Campground</i>	<i>\$34,785,449</i>	<i>\$34,848,460</i>	0.2%	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.

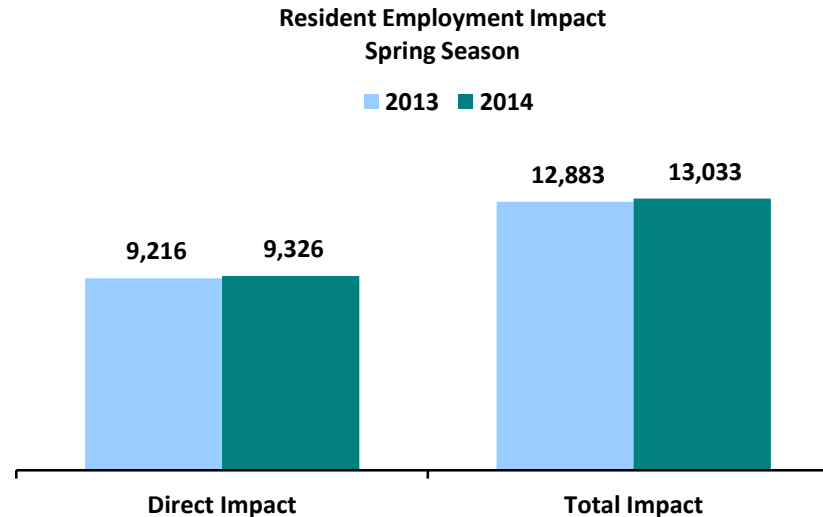
Impact on Jobs for Lee County Residents

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.).



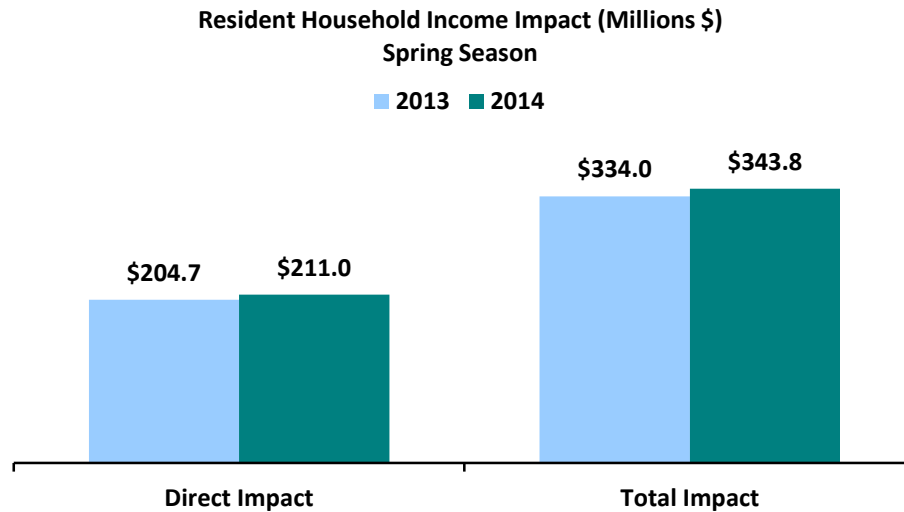
Impact on Household Income for Lee County Residents

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.

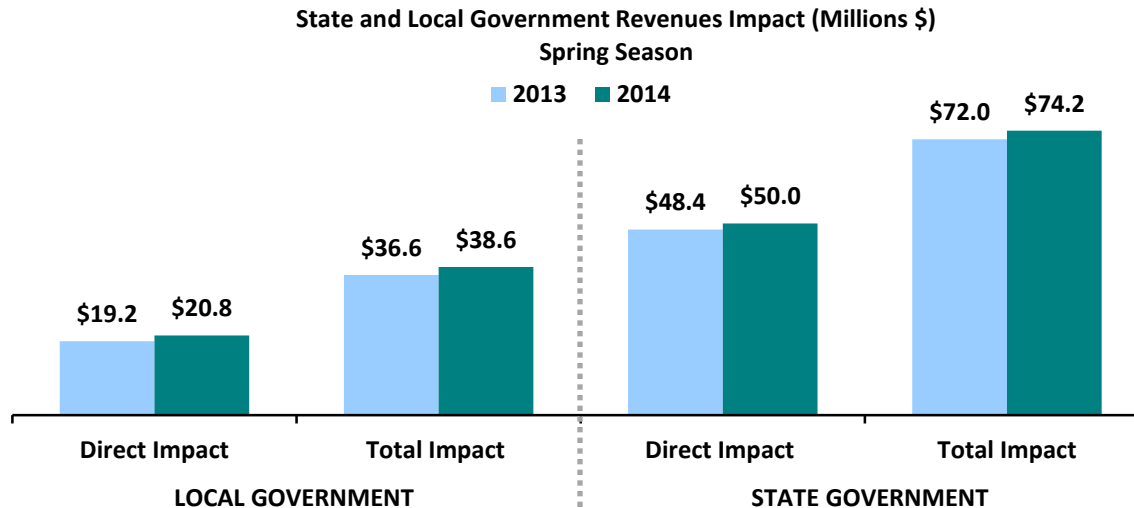
The gross government revenues accruing to governments as a result of producing the output purchased with visitor expenditures is the government revenue impact.

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
Spring 2014

April 2014 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
North Fort Myers	Shell Factory	4/1/14	8
RSW	RSW Airport	4/5/14	30
Cape Coral	Cape Coral Yacht Club	4/7/14	9
Ft. Myers	Edison Estates	4/10/14	29
Fort Meyers Beach	Best Western	4/11/14	11
Fort Meyers Beach	Times Square	4/11/14	22
Sanibel	Sundial	4/15/14	10
Sanibel	Sanibel Siesta	4/15/14	10
Sanibel	Tarpon Pointe	4/15/14	5
Sanibel	Compass Point	4/15/14	5
Sanibel	Holiday Inn	4/15/14	10
Bonita Springs	Bonita Beach	4/17/14	20
RSW	RSW Airport	4/19/14	30
Sanibel	Light House Beach	4/21/14	10
Sanibel	Pointe Santo	4/21/14	10
Sanibel	Casa Ybel	4/21/14	10
Fort Meyers Beach	Cane Palms	4/23/14	10
Fort Meyers Beach	The Pier	4/23/14	15
Fort Meyers Beach	Windward Passage	4/23/14	7
Ft. Myers	Edison Estates	4/25/14	29
Estero	Miromar Outlets	4/28/14	18
Total			308

May 2014 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Fort Meyers Beach	Times Square	5/1/14	9
Fort Meyers Beach	Neptune Inn	5/1/14	10
Fort Meyers Beach	Diamond Head Resort	5/1/14	10
Fort Meyers Beach	Estero Island Beach Club	5/1/14	10
RSW	RSW Airport	5/3/14	30
North Fort Meyers	Shell Factory	5/6/14	11
Bonita Springs	Bonita Beach	5/9/14	34
Sanibel	Light House Beach	5/12/14	9
Sanibel	Holiday Inn	5/12/14	10
Sanibel	Sanibel Siesta	5/12/14	8
Sanibel	Sundial	5/12/14	10
Ft. Myers	Edison Estates	5/15/14	25
Sanibel	Sanibel Beach Club	5/21/14	10
Sanibel	Loggerhead Cay	5/21/14	10
Sanibel	Tortuga Beach Club	5/21/14	8
Fort Meyers Beach	Pink Shell Resort	5/23/14	10
Fort Meyers Beach	Windward Passage	5/23/14	8
Fort Meyers Beach	Best Western	5/23/14	10
Ft. Myers	Edison Estates	5/27/14	25
Estero	Miromar Outlets	5/30/14	16
RSW	RSW Airport	5/31/14	30
Total			303

June 2014 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Bonita Springs	Bonita Beach	6/3/14	25
Sanibel	Light House Beach	6/5/14	31
RSW	RSW Airport	6/7/14	31
Ft. Myers	Edison Estates	6/11/14	23
Sanibel	Sanibel Cottages	6/11/14	6
Estero	Miromar Outlets	6/13/14	12
Cape Coral	Cape Coral Yacht Club	6/14/14	10
Fort Meyers Beach	Neptune Inn	6/17/14	9
Fort Meyers Beach	Diamond Head Resort	6/17/14	10
Fort Meyers Beach	Estero Island Beach Club	6/17/14	12
Ft. Myers	Edison Estates	6/19/14	28
RSW	RSW Airport	6/21/14	30
Sanibel	Tarpon Pointe	6/24/14	10
Sanibel	Casa Ybel	6/24/14	7
Sanibel	Pointe Santo	6/24/14	11
North Fort Meyers	Shell Factory	6/28/14	11
Fort Meyers Beach	Times Square	6/30/14	27
Fort Meyers Beach	Best Western	6/30/14	12
Total			305

Occupancy Interviewing Statistics

Interviews were conducted during the first two weeks of July 2014 to gather data for April, May, and June 2014 lodging activity. Information was provided by 118 Lee County lodging properties.

Lodging Type	Spring 2014 Number of Interviews
Hotel/Motel/Resort/B&Bs	72
Condo/Cottage/Vacation Home/Timeshare	26
RV Park/Campground	20
Total	118