



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

**2014 Annual Visitor Profile and Occupancy Analysis  
(January-December)**

**March 2015**

**Prepared for:**

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

**Prepared by:**

**Davidson-Peterson Associates**



## Executive Summary 2014

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

*For example:*

2013 A	2014 B
60%	70%A

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

## Executive Summary

### Introduction

The following report summarizes the results from the Lee County Visitor Profile and Occupancy research study for Calendar Year 2014, with comparisons to Calendar Year 2013. The research is conducted throughout the year and includes surveys of:

- Visitors in Lee County (monthly in-person interviews);
- Lodging Property managers (quarterly online and telephone interviews); and
- Residents of Lee County (quarterly telephone interviews).

Where referenced the seasons are defined as follows:

- Winter (January-March)
- Spring (April-June)
- Summer (July-September)
- Fall (October-December)

## Executive Summary

### Visitation Estimates

- Over the course of calendar year 2014, Lee County hosted an estimated 5.0 million visitors, a 4.3% increase over the prior year. More than half of these visitors stayed in paid lodging on their trip (60%), while the remainder stayed with friends or relatives.
- Lee County saw a significant increase in the number of paid accommodations visitors from 2013 to 2014 (+11.6%). However, this increase was offset somewhat by a decline in visitors staying with friends or relatives year-over-year (-5.1%).

Estimated Visitation	2013	2014	% Change
Paid Accommodations	2,703,012	3,015,974	11.6%
Friends/Relatives	2,094,921	1,987,596	-5.1%
<b>Total Visitation</b>	<b>4,797,933</b>	<b>5,003,570</b>	<b>4.3%</b>

### Visitor Expenditures

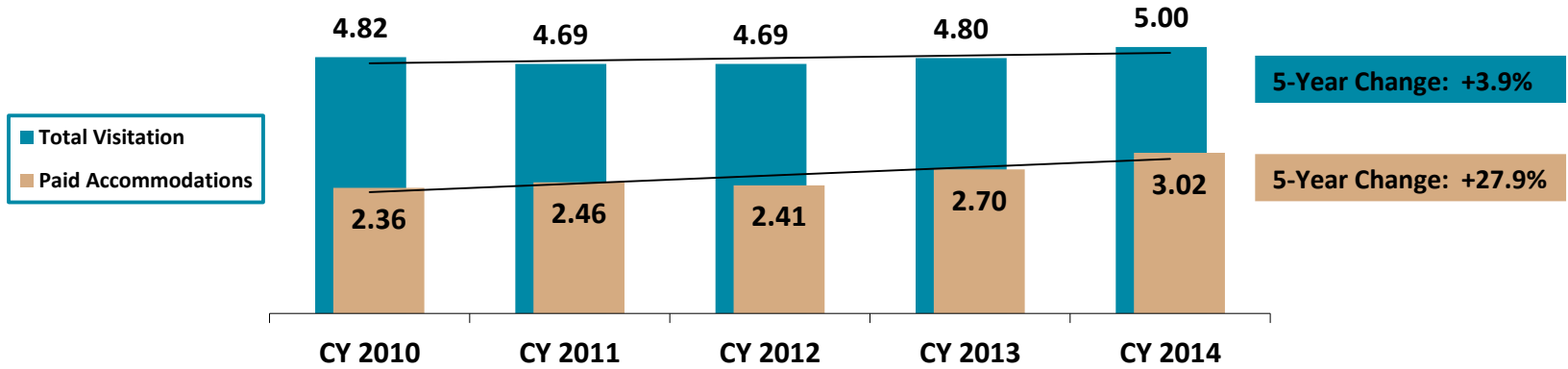
- Visitors contributed an estimated \$2.87 billion in direct spending to the Lee County economy during 2014, a 3.5% increase over 2013 estimated visitor spending (\$2.77 billion).
- About two-thirds of 2014 total direct expenditures came from visitors staying in paid accommodations, amounting to \$1.94 billion, a 6.6% increase over 2013. Similar to the year-over-year trend in visitation, the VFR traveler segment showed a modest decline (-2.4%).

Estimated Expenditures	2013	2014	% Change
Paid Accommodations	\$1,818,293,459	\$1,938,003,424	6.6%
Friends/Relatives	\$949,846,687	\$927,094,353	-2.4%
<b>Total Expenditures</b>	<b>\$2,768,140,146</b>	<b>\$2,865,097,777</b>	<b>3.5%</b>

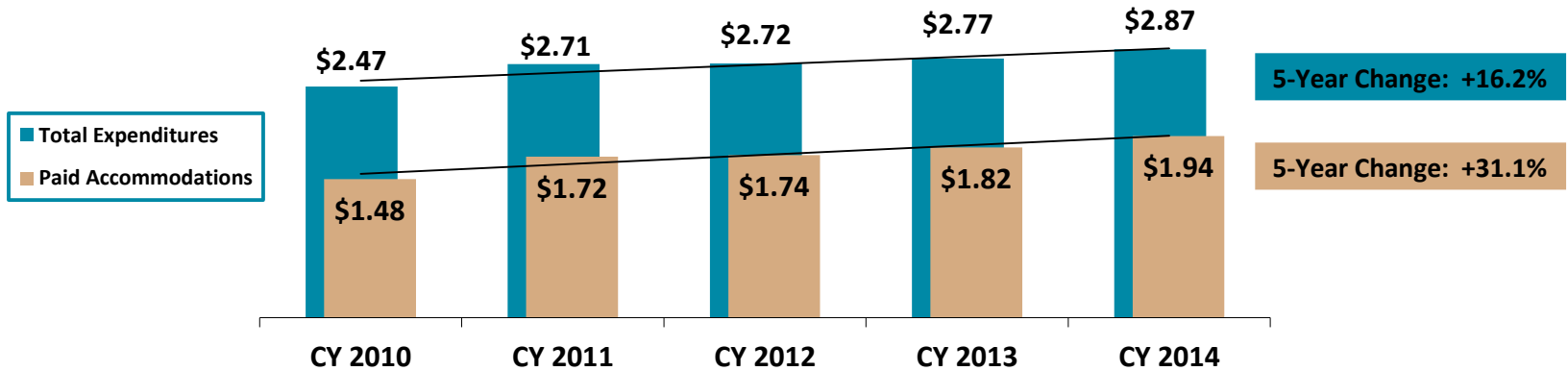
5-Year Trends in Visitation and Expenditures

- Estimated visitation and visitor expenditures have been steadily rising over the past several years, particularly among the paid accommodation guest visitor segment.

**Estimated Visitation (in Millions)**



**Estimated Expenditures (in Billions)**

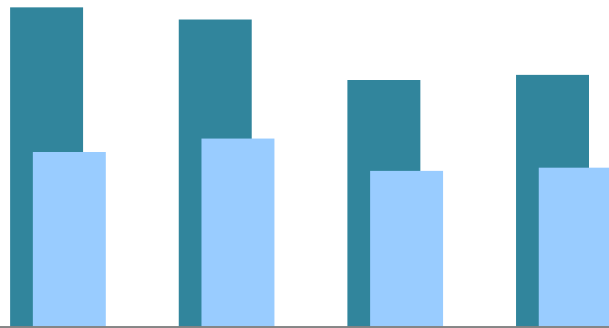


Visitation and Expenditure Estimates by Season

- As seen in previous years, the winter season drove the highest levels of visitation and visitor spending versus other seasons during 2014. Winter season contributed 28% of the visitors for the year but their spending amounted to 37% of the total. Spring season visitation was only slightly lower than winter season, but spending among spring visitors is significantly lower.

**Estimated Visitation**

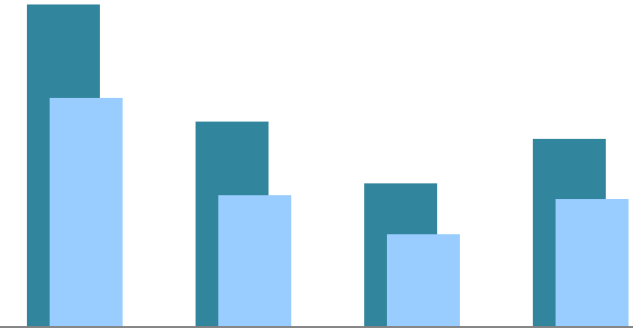
■ Total Visitation    ■ Paid Accommodations



	Winter 2014	Spring 2014	Summer 2014	Fall 2014
Total Visitation	1,419,998	1,365,611	1,097,509	1,120,452
Paid Accommodations	777,539	836,684	693,277	708,474

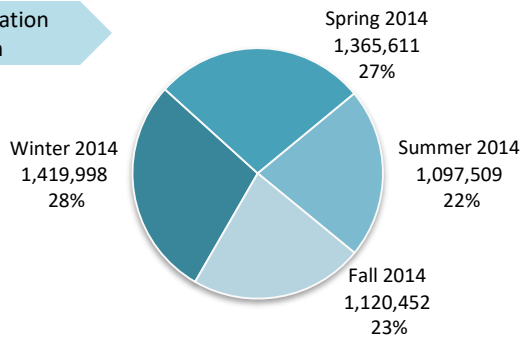
**Estimated Expenditures**

■ Total Expenditures    ■ Paid Accommodations

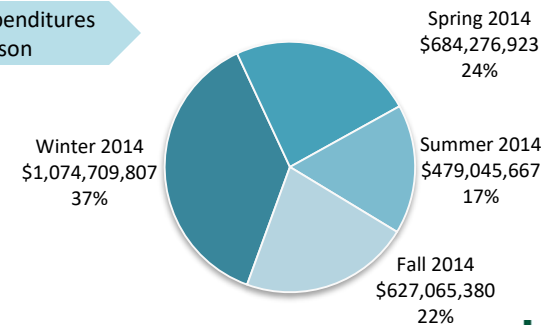


	Winter 2014	Spring 2014	Summer 2014	Fall 2014
Total Expenditures	\$1,074,709,807	\$684,276,923	\$479,045,667	\$627,065,380
Paid Accommodations	\$763,319,329	\$439,766,340	\$308,889,274	\$426,028,481

% of Total Visitation by Season



% of Total Expenditures by Season



### Visitor Origins

- Most 2014 visitors staying in paid accommodations came from the United States (76%), representing 2.3 million visitors. International markets delivered more than half a million – predominantly coming from Germany, Canada, and the UK.
- Fully half of domestic paid accommodations guests came from the Midwest (50%). The Northwest (24%) and South (22%) contributed about one-quarter each. A very small percentage came from the West (3%).
- New York was the top domestic feeder market for the Lee County lodging industry during 2014, followed by Chicago, Minneapolis, Indianapolis, and Boston. Miami was the key Florida market among the top DMAs.

#### 2014 Top DMAs (Paid Accommodations)

DMAs	%	2014	2013
New York	7.4%	168,330	1
Chicago	5.6%	126,986	2
Minneapolis-Saint Paul	5.4%	124,033	3
Indianapolis	5.4%	122,556	4
Boston (Manchester, NH)	4.7%	107,790	5
Detroit	3.4%	76,782	6
Cleveland-Akron (Canton)	3.0%	69,399	7
Philadelphia	2.9%	66,446	8
Cincinnati	2.7%	60,540	9
Columbus, OH	2.3%	53,157	10
Miami-Fort Lauderdale	2.1%	47,251	11
Pittsburgh	1.9%	42,821	12

#### Visitors Staying in Paid Accommodations

Country of Origin	%		Visitor Estimates		% Change
	2013	2014	2013	2014	
United States	77%	76%	2,072,309	2,279,842	10.0%
Germany	8%	8%	209,199	250,055	19.5%
Canada	5%	6%	139,811	176,059	25.9%
UK	4%	5%	100,457	139,061	38.4%
Other International	6%	6%	170,880	170,956	0.0%
No Answer	<1%	-	10,356	-	-

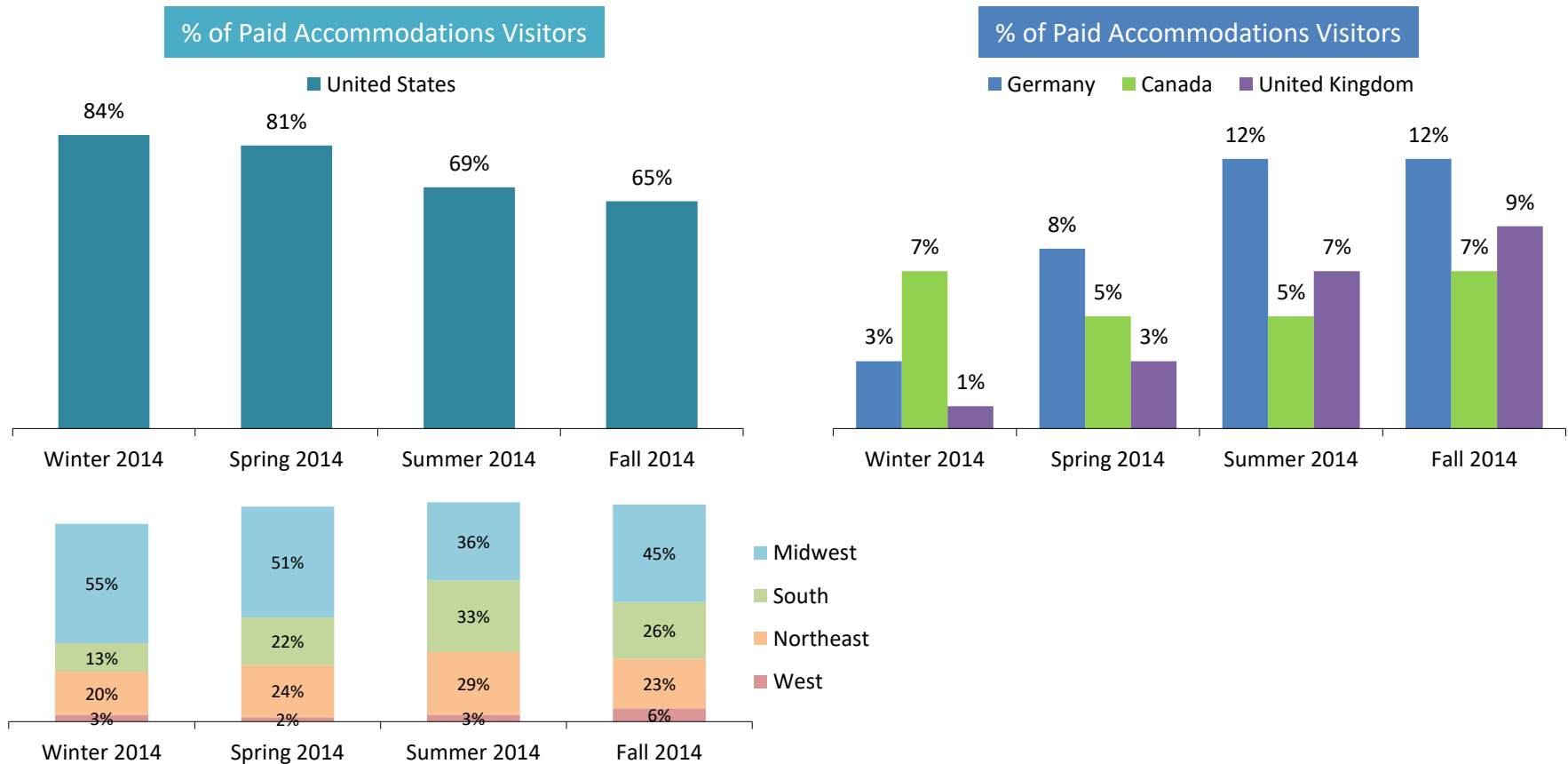
#### Visitors Staying in Paid Accommodations

U.S. Region of Origin	%		Visitor Estimates		% Change
	2013	2014	2013	2014	
Florida	9%	7%	194,700	160,947	-17.3%
South (including Florida)	24%	22%	498,141	503,514	1.1%
Midwest	48%	50%	989,033	1,145,827	15.9%
Northeast	21%	24%	441,181	556,671	26.2%
West	2%	3%	43,497	73,829	69.7%
No Answer	5%	-	100,457	-	-

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

Visitor Origins by Season

- The distribution of visitor origin markets varied depending on the time of year. While the U.S. markets dominated as the majority each season, the proportion of U.S. residents staying in Lee County paid accommodations was higher in the winter and spring seasons than in summer and fall.
- Internationally, Canadians contributed a larger share in the winter and fall seasons than in other seasons. In contrast, the incidence of German visitors was lowest in the winter season and peaked in the summer and fall seasons. The same pattern was true for UK visitors.





## Trip Planning

- The majority of 2014 visitors, started planning their Lee County trip well in advance of arrival. Seven in ten started talking about their Lee County trip three or more months in advance, and almost two-thirds chose the destination within that timeframe. However, fewer made their lodging reservations within that timeframe.
  - 73% started talking about trip 3+ months in advance (vs. 75% in 2013)
  - 66% chose Lee County for trip 3+ months in advance (vs. 68% in 2013)
  - 57% made lodging reservation 3+ months in advance (vs. 57% in 2013)

First time visitors were more likely to make the decision to visit Lee County within in shorter planning horizon, i.e., less than three months before their trip – than were repeaters (35% first-timers vs. 26% repeaters).

- Similar to prior years, most 2014 visitors reported they used the internet to aid in planning their Lee County trip (88%). Four in ten mentioned using airline websites – the highest level of mentions (43%). Somewhat fewer 2014 visitors used search engines (28%), hotel websites (26%), Trip Advisor (25%) and/or booking websites (24%).
- Many 2014 visitors said they access online destination planning information using multiple devices – with a laptop computer being most prevalent (61%). While 2014 saw a slight decrease in visitors using their desk computer (43% vs. 46% in 2013), there were increases in the incidence of using smartphones (48% vs. 44% in 2013) and tablets (43% vs. 33% in 2013) for destination planning information.
- The attributes 2014 visitors rated highest for having positively influenced their selection of Lee County as a destination were:
  - *Warm weather* (87%)
  - *Peaceful/relaxing* (83%)
  - *White sandy beaches* (78%)
  - *A safe destination* (72%)
  - *Clean, unspoiled environment* (69%)

## Trip Profile

- Flying continues to be a main mode of transportation for 2014 visitors with two-thirds flying to the area (73%) – a slight increase from last year (69%). Eight in ten air travelers deplaned at Southwest Florida International Airport (85%).
- Comparable to last year, 2014 visitors reported they were staying in Lee County about 9 days on average. Eight in ten visitors said the purpose of their trip was to vacation (84%), a slight decrease from last year (90%).
- Seven in ten visitors had been to Lee County before (71%), and these repeat visitors averaged about five trips to the County in the past five years. As seen in previous years, international visitors were much more likely to be first-timers (43%) than were domestic visitors (24% out-of-state and 15% in-state). Additionally, the share of first-time international visitors was much higher in 2014 than in the prior year (43% vs. 34% in 2013).
- About one-third of 2014 visitors surveyed said they were staying in a hotel/motel/resort property (36%). A similar proportion indicated they were staying in a condo/vacation home property (39%) – either rented or owned/borrowed. Two in ten visitors reported they were staying with friends or family – an increase over the prior year (20% vs. 14% in 2013). Among paid accommodation guests, nearly half felt the quality of their lodgings *far exceeded or exceeded expectations* (44%), and the other half said the quality *met expectations* (51%).
- The majority of visitors claimed to be enjoying Lee County's *beaches* (91%) during their trip. Similarly, when asked which attractions they were visiting on their Lee County trip, beaches received the highest level of mentions at 81%. Many visitors also enjoyed *relaxing* (76%), *dining out* (72%), *swimming* (56%) and *shopping* (56%) while in Lee County. Half of 2014 visitors took a day trip outside the County (49%) – those that did were most likely to go to Naples (31%).
- Visitor satisfaction remains extremely high in Lee County. The vast majority of 2014 visitors said they were either *very satisfied* or *satisfied* with their visit (58% and 35% respectively), however, there was a decline in *very satisfied* ratings from last year (64%). Intent to return to Lee County is quite strong with nine in ten responding affirmatively (88%), and more than half of them claimed they will do so next year (57%). Additionally, most visitors indicated they would recommend Lee County to a friend over other areas in Florida (88%).
- When asked to provide feedback on specific aspects visitors may have disliked about Lee County during their 2014 trip, *traffic* led the list with 28% citing it was a concern. Far fewer mentioned *insects* (16%), *beach seaweed* (10%), and *high prices* (9%) as dislikes. On a positive note, visitors concerns about *insects*, *beach seaweed*, *weather*, and *red tide* were less pronounced during 2014 than during the previous year.

### Visitor and Travel Party Characteristics

- The composition of 2014 visitors and their travel parties can be summarized as follows:
  - 52 years of age on average (age of respondent)
  - \$106,200 household income on average
  - 74% married
  - 40% traveling as a couple
  - 34% traveling as a family
  - 23% traveling *with* children
  - 3 people in travel party on average

### Lodging Industry Assessments

- For the Lee County lodging industry in total, there was a decrease of 160,704 in *available* room nights (-2.1%) from 2013 to 2014 and an increase of 95,377 *occupied* room nights (+2.1%).

	Occupied Room Nights			Available Room Nights		
	2013	2014	% Change	2013	2014	% Change
Hotel/Motel/Resort/B&B	2,585,837	2,700,101	4.4%	4,056,940	4,029,441	-0.7%
Condo/Cottage/Vacation Home	1,086,010	1,036,368	-4.6%	1,711,210	1,565,101	-8.5%
RV Park/Campground	912,120	942,875	3.4%	1,816,391	1,829,295	0.7%
<b>Total</b>	<b>4,583,967</b>	<b>4,679,344</b>	<b>2.1%</b>	<b>7,584,541</b>	<b>7,423,837</b>	<b>-2.1%</b>

- As a result, the industry-wide average occupancy rate in Lee County increased from 60.4% in 2013 to 63.0% in 2014 (+4.3%). Average occupancy rate for the hotel/motel/resort and condo/vacation home categories showed notable increases (+5.1% and +4.3% respectively), while the increase for RV parks/campgrounds was somewhat more modest (+2.6%).
- Lee County's average daily rate increased 5.7% year-over-year from \$129.53 to \$136.98. All property categories saw growth in ADR versus the prior year.
- The increase in both average occupancy rate and ADR generated a 10.3% gain in RevPAR year-over-year. All three property categories experienced growth in RevPAR, with significant increases observed for hotels/motels/resorts and condos/vacation homes.

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

### Lodging Industry Assessments (cont'd)

- When interviewed each quarter, many Lee County property managers indicated their projected reservations for the coming months were more favorable than the same period the prior year. Six in ten managers responding reported that their total level of reservations for the next three months were *up* over the same period the prior year – significantly higher than last year (60% vs. 51% in 2013). One-third said reservations for the next three months were the *same* (29% vs. 33% in 2013), and only one in ten claimed that their reservations were *down* for the next three months (9% vs. 15% in 2013).

## 2014 Lee County Snapshot

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

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

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

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

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

## Visitor Profile Analysis 2014

*A total of 3,701 interviews were conducted with visitors in Lee County during the months of January – December 2014. A total sample of this size is considered accurate to plus or minus 1.6 percentage points at the 95% confidence level.*

*A total of 3,676 interviews were conducted with visitors in Lee County during the months of January – December 2013. A total sample of this size is considered accurate to plus or minus 1.6 percentage points at the 95% confidence level.*

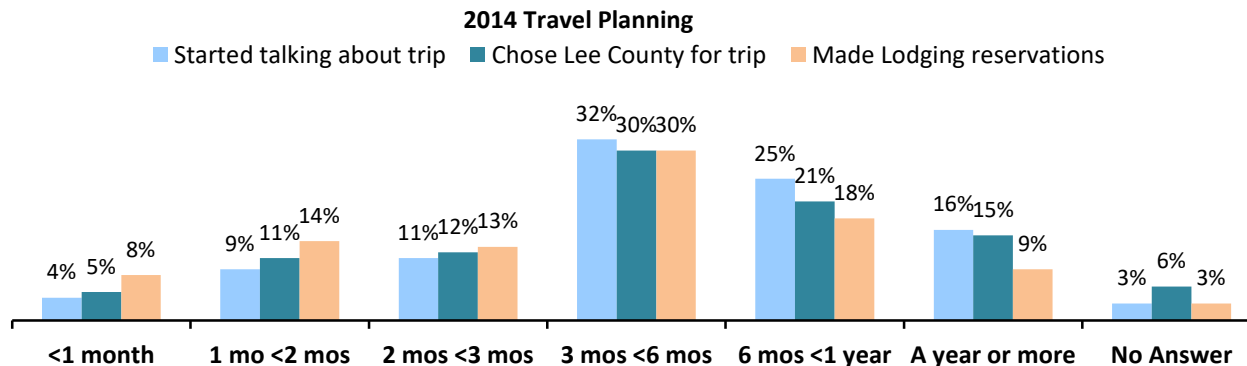
## Travel Planning

	Started Talking About Trip		Chose Lee County for Trip		Made Lodging Reservations*	
	2013	2014	2013	2014	2013	2014
	A	B	A	B	A	B
<b>Total Respondents</b>	<b>3676</b>	<b>3701</b>	<b>3676</b>	<b>3701</b>	<b>2609*</b>	<b>2374*</b>
<u>Less than 3 months (NET)</u>	<u>23%</u>	<u>24%</u>	<u>27%</u>	<u>28%</u>	<u>37%<sup>b</sup></u>	<u>34%</u>
<1 month	3%	4%	5%	5%	6%	8%
1 month - <2 months	9%	9%	11%	11%	15%	14%
2 months - <3 months	11%	11%	12%	12%	16% <sup>b</sup>	13%
<u>3 months or more (NET)</u>	<u>75%</u>	<u>73%</u>	<u>68%<sup>b</sup></u>	<u>66%</u>	<u>57%</u>	<u>57%</u>
3 months - <6 months	32%	32%	30%	30%	30%	30%
6 months - <1 year	24%	25%	21%	21%	18%	18%
A year or more	18% <sup>b</sup>	16%	18% <sup>b</sup>	15%	9%	9%
No Lodging Reservations Made	N/A	N/A	N/A	N/A	4%	5%
No Answer	2%	3% <sup>a</sup>	4%	6% <sup>a</sup>	2%	3%

Q3a: When did you “start talking” about going on this trip?

Q3b: When did you choose Lee County for this trip?

Q3c: When did you make lodging reservations for this trip?



\* Base: Among those staying in paid accommodations



## Travel Planning

Devices Used to Access Destination Planning Information		
	2013	2014
	A	B
<b>Total Respondents</b>	<b>3676</b>	<b>3701</b>
<u>Any (NET)</u>	<u>95%</u>	<u>96%<sup>a</sup></u>
Laptop computer	62%	61%
Smartphone (iPhone, Blackberry, etc.)	44%	48% <sup>a</sup>
Desktop computer	46% <sup>b</sup>	43%
Tablet (iPad, etc.)	33%	43% <sup>a</sup>
E-Reader (Nook, Kindle, etc.)	5%	4%
Other portable device	1%	1%
None of these	4%	4%
No Answer	1% <sup>b</sup>	<1%

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

Travel Websites Visited		
	2013	2014
	A	B
<b>Total Respondents who use devices for destination planning</b>	<b>3491</b>	<b>3556</b>
<u>Visited web sites (net)</u>	<u>87%</u>	<u>88%</u>
Airline websites	39%	43% <sup>a</sup>
Search Engines	32% <sup>b</sup>	28%
Hotel websites	27%	26%
Trip Advisor	21%	25% <sup>a</sup>
Booking websites	28% <sup>b</sup>	24%
Vacation rental websites*	N/A	24%
www.FortMyers-Sanibel.com	16% <sup>b</sup>	12%
Visit Florida	9%	9%
AAA	7%	7%
Facebook	5%	6%
Other	16% <sup>b</sup>	9%
None/Didn't visit websites	12%	11%
No Answer	1%	1%

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

\* Note: Response option added in January 2014.

## Travel Planning

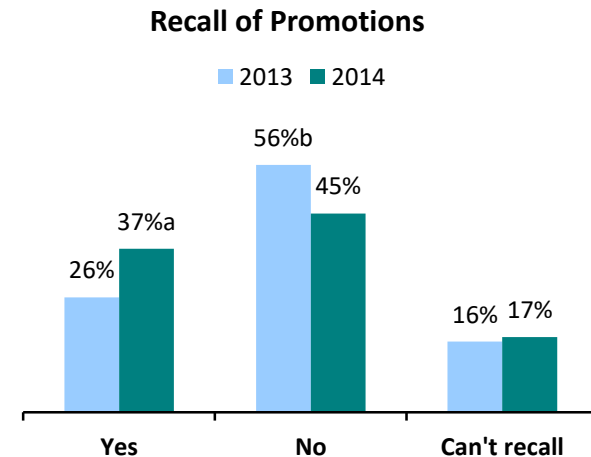
Travel Information Requested		
	2013	2014
	A	B
<b>Total Respondents</b>	<b>3676</b>	<b>3701</b>
<u>Requested information (NET)</u>	<u>33%<sup>b</sup></u>	<u>28%</u>
Hotel Web Site	16% <sup>b</sup>	12%
VCB website	8% <sup>b</sup>	6%
Call hotel	8% <sup>b</sup>	6%
Visitor Guide	3%	4% <sup>a</sup>
E-Newsletter	1%	1%
Call local Chamber of Commerce	1%	<1%
Other	9%	9%
<u>None/Did not request information</u>	<u>64%</u>	<u>67%<sup>a</sup></u>
No Answer	3%	5% <sup>a</sup>

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

Recall of Lee County Promotions		
	2013	2014
	A	B
<b>Total Respondents</b>	<b>3676</b>	<b>3701</b>
Yes	26%	37% <sup>a</sup>
No	56% <sup>b</sup>	45%
Can't Recall	16%	17%

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

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



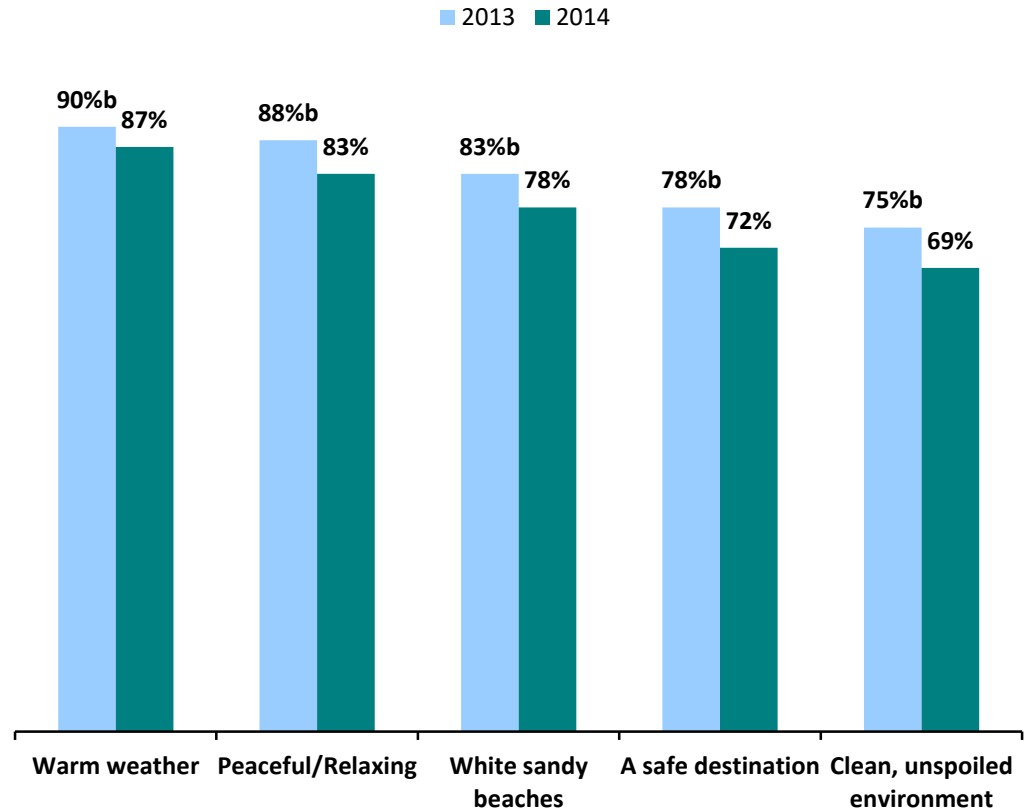
## Travel Planning

Travel Decision Influences*		
	2013	2014
	A	B
<b>Total Respondents</b>	<b>3676</b>	<b>3701</b>
Warm weather	90% <sup>b</sup>	87%
Peaceful/Relaxing	88% <sup>b</sup>	83%
White sandy beaches	83% <sup>b</sup>	78%
A safe destination	78% <sup>b</sup>	72%
Clean, unspoiled environment	75% <sup>b</sup>	69%
Convenient location	70% <sup>b</sup>	66%
Good value for the money	68% <sup>b</sup>	62%
Plenty to see and do	62% <sup>b</sup>	59%
Reasonably priced lodging	63% <sup>b</sup>	55%
A "family" atmosphere	60% <sup>b</sup>	54%
Affordable dining	57% <sup>b</sup>	53%
Upscale accommodations	57% <sup>b</sup>	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		
	2013	2014
	A	B
<b>Total Respondents</b>	<b>3676</b>	<b>3701</b>
Fly	69%	73%a
Drive a personal vehicle	25%b	21%
Drive a rental vehicle	4%	5%
Drive an RV	1%	1%
Other/No Answer (NET)	1%	<1%

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

Frequency of Using SWFL Int'l (Past Year)		
	2013	2014
	A	B
<b>Total Respondents</b>	<b>3676</b>	<b>3701</b>
<u>One or more trips</u>	<u>56%</u>	<u>60%a</u>
1 trip	37%	39%a
2 to 3 trips	14%	16%
4 to 5 trips	2%	3%
6 or more trips	2%	2%
<u>None/No Answer</u>	<u>44%b</u>	<u>40%</u>

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

Airport Used		
	2013	2014
	A	B
<b>Total Respondents Who Arrived by Air</b>	<b>2535</b>	<b>2699</b>
SW Florida Int'l (Fort Myers)	82%	85%a
Punta Gorda*	N/A	3%
Orlando Int'l	4%b	3%
Miami Int'l	4%b	3%
Tampa Int'l	4%	2%
Ft. Lauderdale Int'l	2%	2%
West Palm Beach Int'l**	<1%	N/A
Sarasota/Bradenton**	<1%	N/A
Other/No Answer (NET)	3%b	1%

Q2: At which Florida airport did you land?

\*Note: Response option added in January 2014.

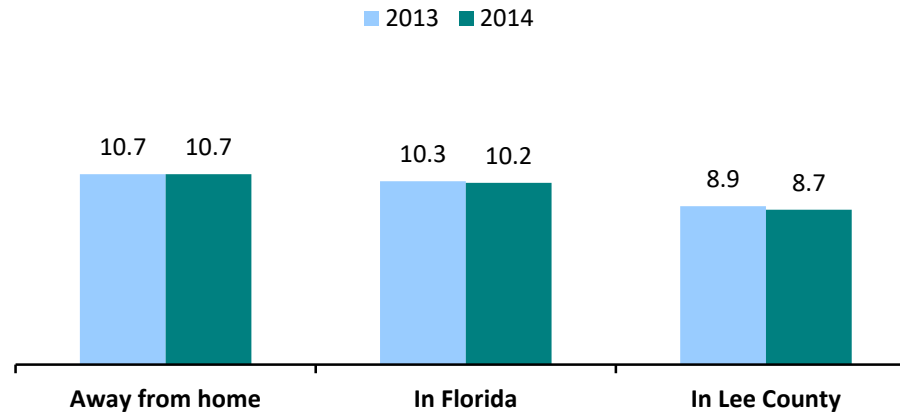
\*\* Note: Response options removed in January 2014.

### Trip Profile

Trip Length Mean # of Days (excluding outliers)		
	2013	2014
	A	B
<b>Total Respondents</b>	<b>3676</b>	<b>3701</b>
Away from home	10.7	10.7
In Florida	10.3	10.2
In Lee County	8.9	8.7

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

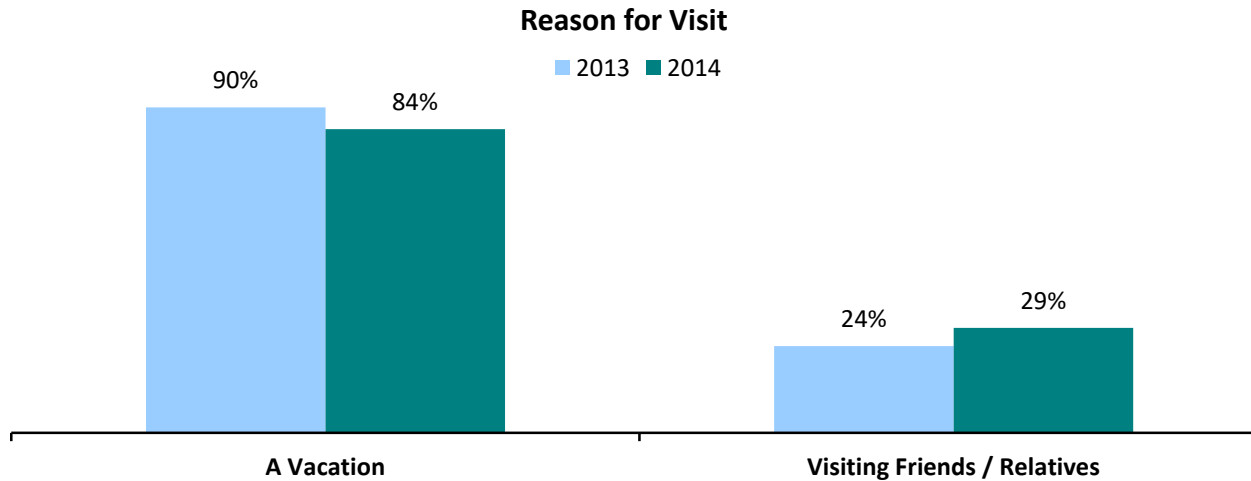
**Trip Length (mean # of days)**



### Trip Profile

Reason(s) for Visit		
	2013	2014
	A	B
<b>Total Respondents</b>	<b>3676</b>	<b>3701</b>
A Vacation	90% <sup>b</sup>	84%
Visiting Friends/Relatives	24%	29% <sup>a</sup>
Sporting Event(s)	2%	2%
Personal Business	2%	2%
Other Business Trip	1%	1%
A Conference/Meeting	1%	1%
A Convention/Trade Show	<1%	<1%
Other/No Answer (NET)	1%	2% <sup>a</sup>

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



## Trip Profile

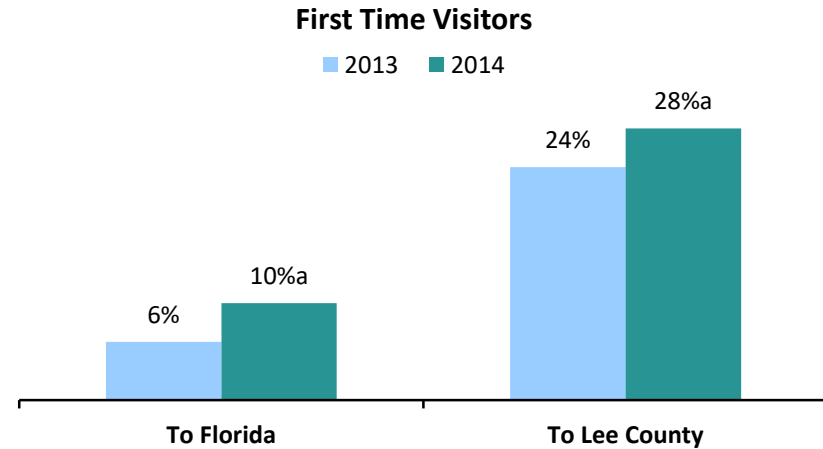
First Time Visitors to Lee County								
	Total		Florida Residents		Out-of-State Residents		International Visitors	
	2013	2014	2013	2014	2013	2014	2013	2014
	A	B	A	B	A	B	A	B
<b>Total Respondents</b>	<b>3676</b>	<b>3701</b>	<b>252</b>	<b>150</b>	<b>2442</b>	<b>2244</b>	<b>815</b>	<b>857</b>
First-time visitor	24%	28% <sup>a</sup>	14%	15%	21%	24%	34%	43% <sup>a</sup>
Repeat visitor	76% <sup>b</sup>	71%	86%	83%	78%	75%	65% <sup>b</sup>	56%
No Answer	1%	1% <sup>a</sup>	-	2%	1%	1%	1%	1%

Q15: Is this your first visit to Lee County?

First Time Visitors to Florida		
	2013	2014
<b>Total Respondents</b>	<b>3676</b>	<b>3701</b>
	<b>A</b>	<b>B</b>
Yes, first-time visitor	6%	10% <sup>a</sup>
No	87% <sup>b</sup>	85%
No answer	1%	1% <sup>a</sup>
<i>FL Residents*</i>	7% <sup>b</sup>	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 .*



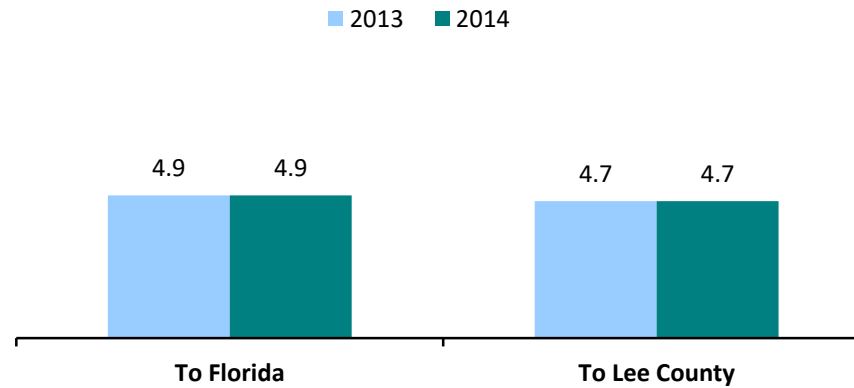
## Trip Profile

Previous Visits in Five Years				
	Mean # of Visits to Florida		Mean # of Visits to Lee County	
	2013	2014	2013	2014
	A	B	A	B
<b>Base: Repeat Visitors</b>	<b>3194 (FL res. Excl)</b>	<b>3149 (FL res. Excl)</b>	<b>2779</b>	<b>2626</b>
Number of visits	4.9	4.9	4.7	4.7

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

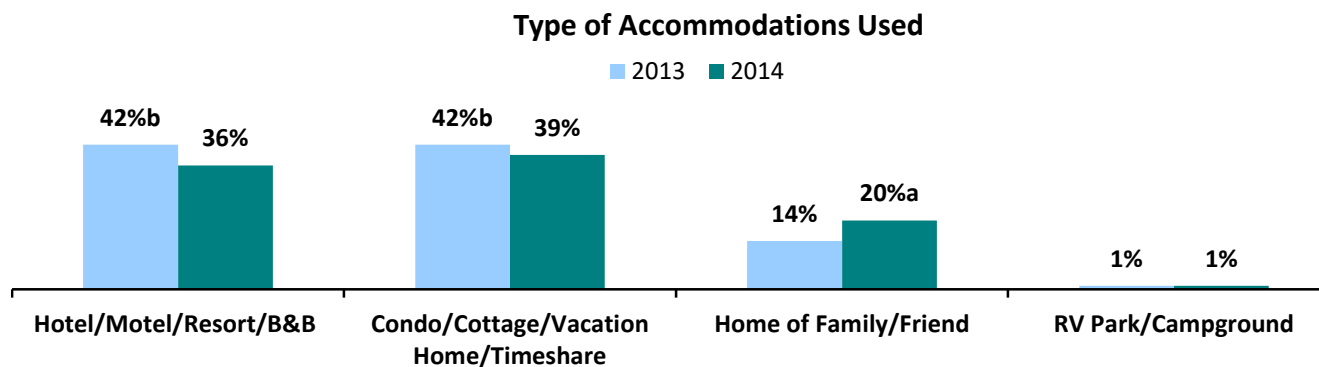




## Trip Profile

Type of Accommodations Used		
	2013	2014
	A	B
<b>Total Respondents</b>	<b>3676</b>	<b>3701</b>
<b><u>Hotel/Motel/Resort/B&amp;B (NET)</u></b>	<b><u>42%<sup>b</sup></u></b>	<b><u>36%</u></b>
At a hotel/motel/historic inn	22%	21%
At a resort	20% <sup>b</sup>	15%
At a Bed and Breakfast	<1%	<1%
<b><u>Condo/Cottage/Vacation Home/Timeshare (NET)</u></b>	<b><u>42%<sup>b</sup></u></b>	<b><u>39%</u></b>
Rented home/condo	28%	27%
Owned home/condo	10% <sup>b</sup>	8%
Borrowed home/condo	4%	4%
<b>At the home of family or a friend</b>	<b>14%</b>	<b>20%<sup>a</sup></b>
<b>RV Park/Campground (NET)</b>	<b>1%</b>	<b>1%</b>
<b>Daytripper (No Accommodations)</b>	<b>1%</b>	<b>4%<sup>a</sup></b>

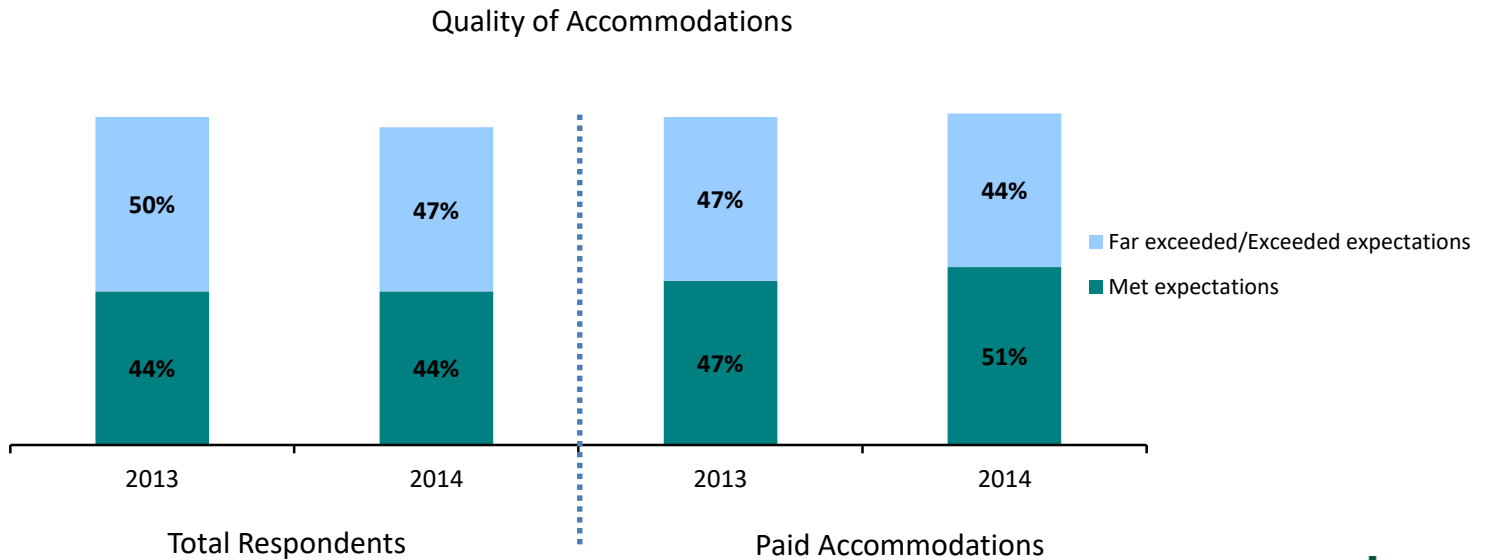
Q20: Are you staying overnight (either last night or tonight):



## Trip Profile

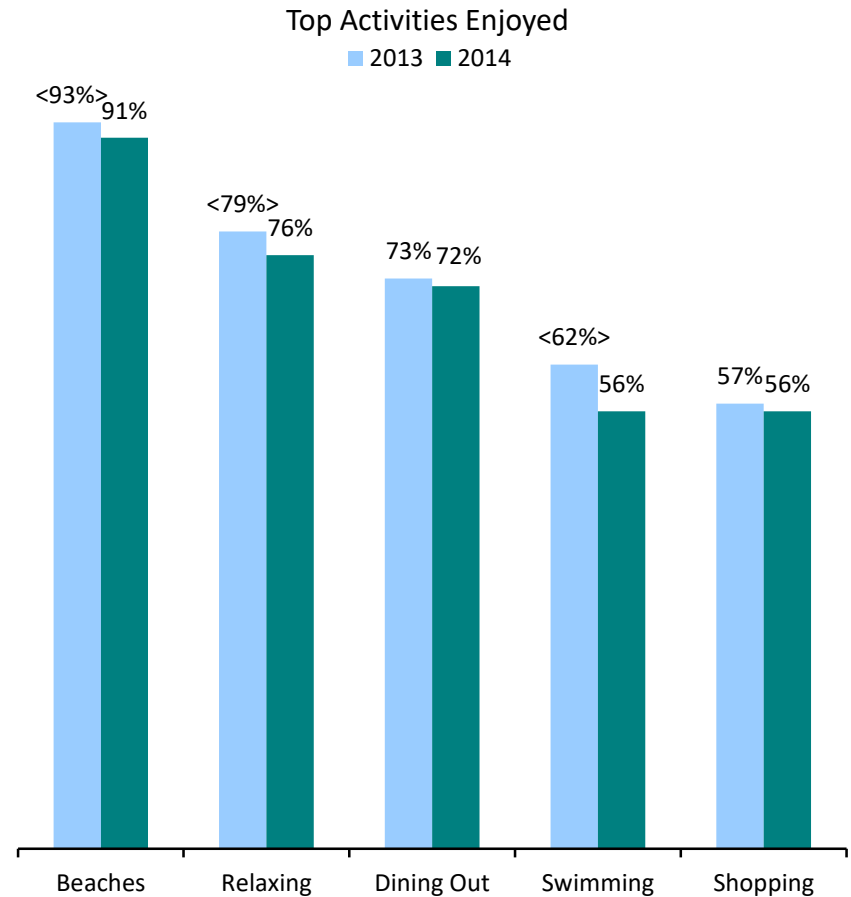
Quality of Accommodations				
	Total Respondents		Paid Accommodations	
	2013	2014	2013	2014
	A	B	A	B
<b>Respondents</b>	<b>3676</b>	<b>3701</b>	<b>2609</b>	<b>2374</b>
Far exceeded/Exceeded expectations	50% <sup>b</sup>	47%	47% <sup>b</sup>	44%
Met your expectations	44%	44%	47%	51% <sup>a</sup>
Did not meet/Far below expectations	2%	3%	3%	3%
No Answer	4%	7% <sup>a</sup>	3% <sup>b</sup>	2%

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



## Trip Activities

Activities Enjoyed		
	2013	2014
	A	B
<b>Total Respondents</b>	<b>3676</b>	<b>3701</b>
Beaches	93% <sup>b</sup>	91%
Relaxing	79% <sup>b</sup>	76%
Dining Out	73%	72%
Swimming	62% <sup>b</sup>	56%
Shopping	57%	56%
Sightseeing	35%	37% <sup>a</sup>
Shelling	41% <sup>b</sup>	36%
Visiting Friends/Relatives	28%	30% <sup>a</sup>
Attractions	26%	25%
Watching Wildlife	25%	23%
Bicycle Riding	19%	18%
Photography	21% <sup>b</sup>	17%
Exercise/Working Out	17%	16%
Birdwatching	15%	14%
Bars/Nightlife	15% <sup>b</sup>	14%
Golfing	10%	12% <sup>a</sup>
Boating	10%	12%
Fishing	11%	11%
Kayaking/Canoeing	7%	8%
Miniature Golf	7%	8%
Guided Tour	5%	6% <sup>a</sup>
Parasailing /Jet Skiing	6%	6%
Cultural Events	4%	5%
Sporting Event	5%	5%
Tennis	4%	4%
Scuba Diving /Snorkeling	2%	2%
Other	3%	3%
No Answer	1%	1% <sup>a</sup>



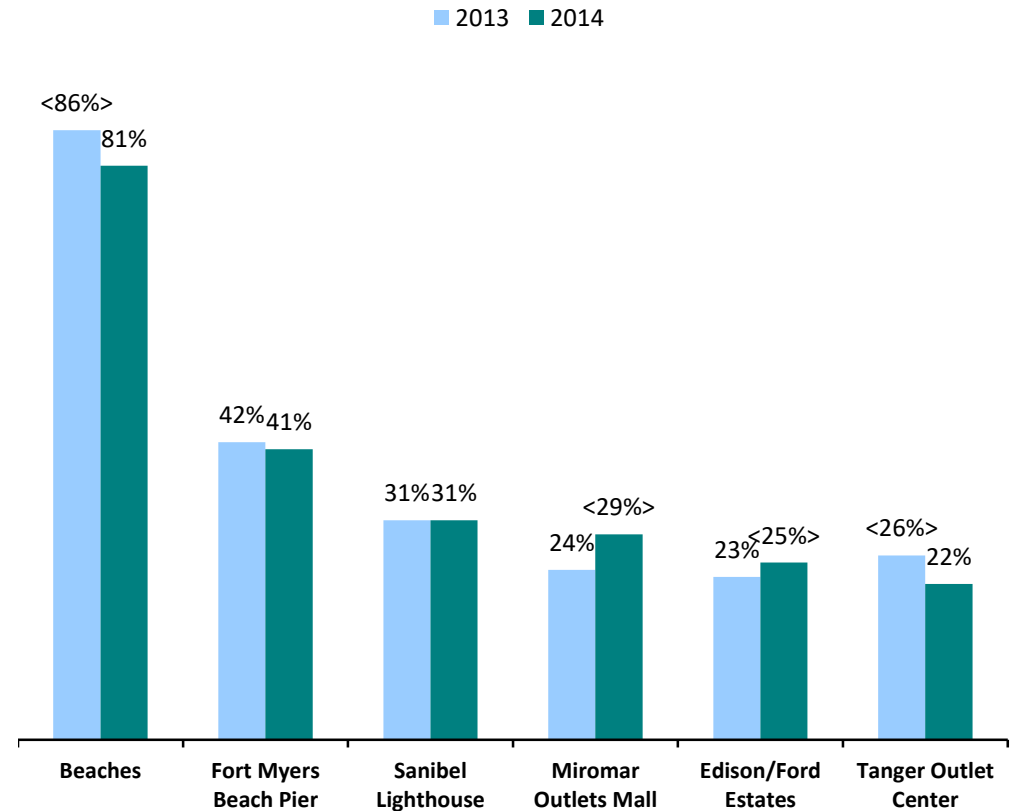
Q23: What activities or interests are you enjoying while in Lee County?  
(Please mark ALL that apply.)

## Trip Activities

Attractions Visited		
	2013	2014
	A	B
<b>Total Respondents</b>	<b>3676</b>	<b>3701</b>
Beaches	86% <sup>b</sup>	81%
Fort Myers Beach Pier	42%	41%
Sanibel Lighthouse	31%	31%
Miromar Outlets Mall	24%	29% <sup>a</sup>
Edison/Ford Estates	23%	25% <sup>a</sup>
Tanger Outlet Center	26% <sup>b</sup>	22%
Ding Darling National Wildlife Refuge	17%	16%
Coconut Point Mall	13%	13%
Periwinkle Place	16% <sup>b</sup>	13%
Bell Tower Shops	12%	11%
Gulf Coast Town Center	9%	9%
Shell Factory and Nature Park	10%	9%
Edison Mall	10% <sup>b</sup>	8%
Manatee Park	4%	5%
Bailey-Matthews Shell Museum	4%	3%
Broadway Palm Dinner Theater	2%	2%
Barbara B. Mann Performing Arts Hall	1%	1%
Babcock Wilderness Adventures	1%	1%
Other	6%	5%
None/No Answer (NET)	4%	5%

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

### Top Attractions Visited



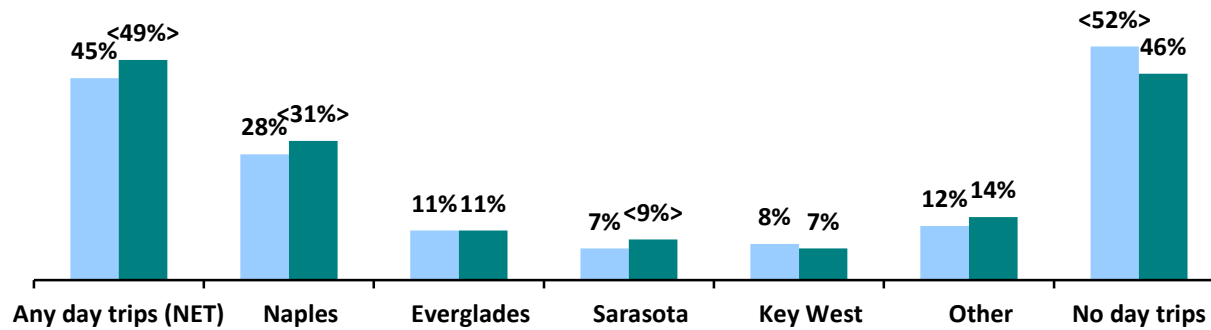
## Trip Activities

Day Trips Outside Lee County		
	2013	2014
	A	B
<b>Total Respondents</b>	<b>3676</b>	<b>3701</b>
<u>Any day trips (NET)</u>	<u>45%</u>	<u>49%<sup>a</sup></u>
<i>Naples</i>	28%	31% <sup>a</sup>
<i>Everglades</i>	11%	11%
<i>Sarasota</i>	7%	9% <sup>a</sup>
<i>Key West</i>	8%	7%
<i>Other</i>	12%	14%
<u>No day trips</u>	<u>52%<sup>b</sup></u>	<u>46%</u>
No Answer	10%	13% <sup>a</sup>

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

### Day Trips Outside Lee County

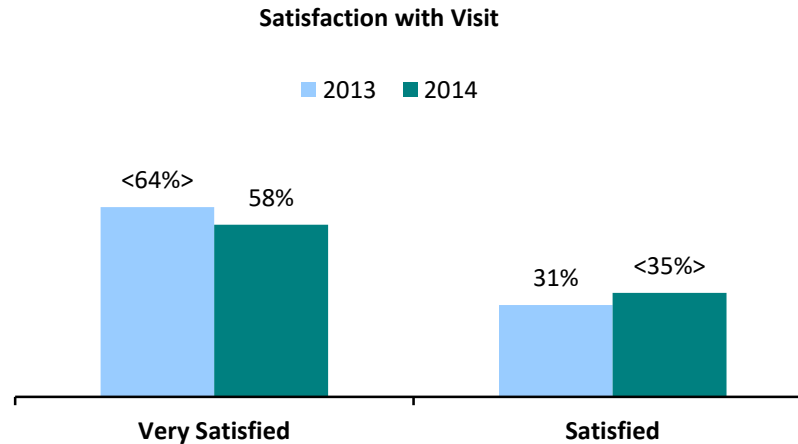
■ 2013 ■ 2014



## Lee County Experience

Satisfaction with Visit		
	2013	2014
	A	B
<b>Total Respondents</b>	<b>3676</b>	<b>3701</b>
<u>Very Satisfied/Satisfied</u>	<u>95%<sup>b</sup></u>	<u>93%</u>
<i>Very Satisfied</i>	<i>64%<sup>b</sup></i>	<i>58%</i>
<i>Satisfied</i>	<i>31%</i>	<i>35%<sup>a</sup></i>
Neither	2%	2%
Dissatisfied/Very Dissatisfied	<1%	1%
Don't know/no answer	3%	5% <sup>a</sup>

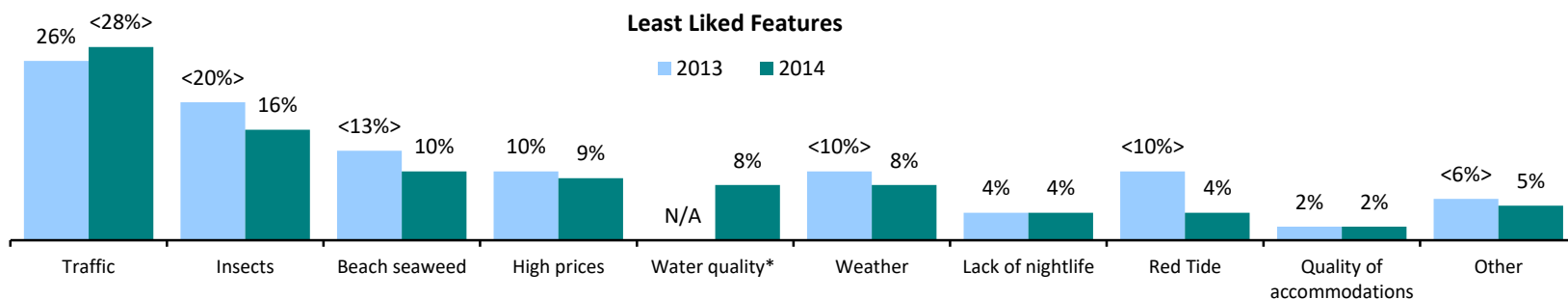
Q28: How satisfied are you with your stay in Lee County?



## Lee County Experience

Least Liked Features		
	2013	2014
	A	B
<b>Total Respondents</b>	<b>3676</b>	<b>3701</b>
Traffic	26%	28%a
Insects	20%b	16%
Beach seaweed	13%b	10%
High prices	10%	9%
Water quality*	N/A	8%
Weather	10%b	8%
Lack of nightlife	4%	4%
Red Tide	10%b	4%
Quality of accommodations	2%	2%
Other	6%b	5%

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



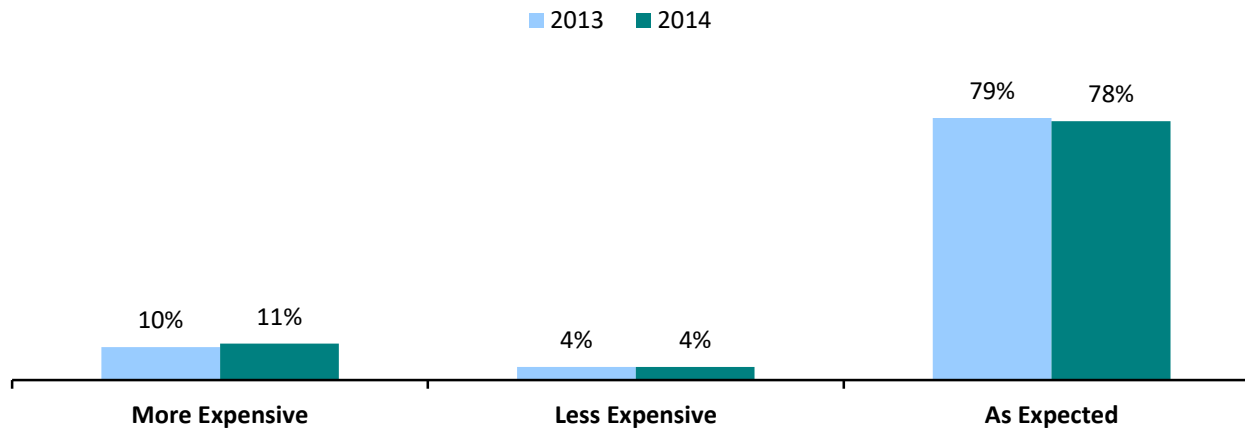
\* Note: Response option added in January 2014.

## Lee County Experience

Perception of Lee County as Expensive		
	2013	2014
	A	B
<b>Total Respondents</b>	<b>3676</b>	<b>3701</b>
More Expensive	10%	11%
Less Expensive	4%	4%
As Expected	79%	78%
Don't know/No Answer (NET)	7%	7%

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





## Future Plans

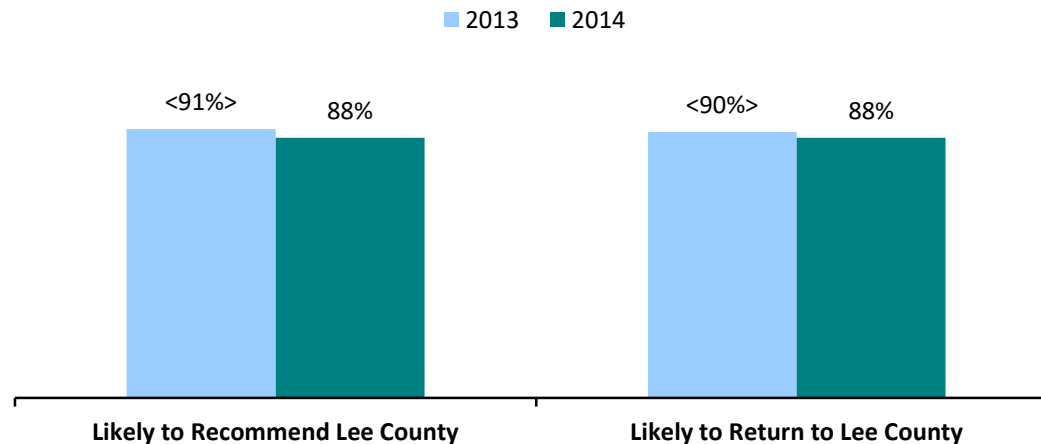
Likelihood to Recommend/Return to Lee County		
	2013	2014
	A	B
<b>Total Respondents</b>	<b>3676</b>	<b>3701</b>
Likely to Recommend Lee County	91%b	88%
Likely to Return to Lee County	90%b	88%
<b>Base: Total Respondents Planning to Return</b>	<b>3293</b>	<b>3241</b>
Likely to Return Next Year	60%b	57%

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")



## Visitor and Travel Party Demographic Profile

Visitor Demographic Profile		
	2013	2014
	A	B
<b>Total Respondents</b>	<b>3676</b>	<b>3701</b>
Age of respondent (mean)	51.6	52.0
Annual household income (mean)	\$107,080	\$106,249
Martial Status		
Married	73%	74%
Single	11%	13%
Vacations per year (mean)	2.8	3.0a
Short getaways per year (mean)	3.8	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		
	2013	2014
	A	B
<b>Total Respondents</b>	<b>3676</b>	<b>3701</b>
Family	37%a	34%
Couple	41%	40%
Single	7%	9%
Group of couples/friends	12%	14%
Mean travel party size	3.1	3.1
Mean adults in travel party	2.6	2.7a

Q17: On this trip, are you traveling:

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

Travel Parties with Children		
	2013	2014
	A	B
<b>Total Respondents</b>	<b>3676</b>	<b>3701</b>
<u>Traveling with any Children (net)</u>	<u>27%b</u>	<u>23%</u>
Any younger than 6	10%	9%
Any ages 6-11	12%b	10%
Any 12-17 years old	15%b	12%
<u>No Children</u>	<u>73%</u>	<u>77%a</u>

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		
	2013	2014	2013	2014	% Change
Paid Accommodations	56%	60%	2,703,012	3,015,974	11.6%
Friends/Relatives	44%	40%	<u>2,094,921</u>	<u>1,987,596</u>	-5.1%
<b>Total Visitation</b>			<b>4,797,933</b>	<b>5,003,570</b>	<b>4.3%</b>

Paid Accommodations Visitors					
	%		Visitor Estimates		
Country of Origin	2013	2014	2013	2014	% Change
United States	77%	76%	2,072,309	2,279,842	10.0%
Germany	8%	8%	209,199	250,055	19.5%
Canada	5%	6%	139,811	176,059	25.9%
UK	4%	5%	100,457	139,061	38.4%
Scandinavia	2%	2%	51,782	51,032	-1.4%
BeNeLux	1%	1%	20,713	31,895	54.0%
Switzerland	1%	1%	30,033	30,619	1.9%
France	1%	1%	24,855	15,310	-38.4%
Latin America	<1%	<1%	4,143	8,931	115.6%
Austria	<1%	<1%	13,463	5,103	-62.1%
Ireland	<1%	<1%	10,356	2,552	-75.4%
Other International	<1%	<1%	15,535	25,516	64.3%
No Answer	<1%	-	10,356	-	-
U.S. Region of Origin	2013	2014	2013	2014	% Change
Florida	9%	7%	194,700	160,947	-17.3%
South (including Florida)	24%	22%	498,141	503,514	1.1%
Midwest	48%	50%	989,033	1,145,827	15.9%
Northeast	21%	24%	441,181	556,671	26.2%
West	2%	3%	43,497	73,829	69.7%
No Answer	5%	-	100,457	-	-

2014 Top DMAs (Paid Accommodations)		
New York	7.4%	168,330
Chicago	5.6%	126,986
Minneapolis-Saint Paul	5.4%	124,033
Indianapolis	5.4%	122,556
Boston (Manchester, NH)	4.7%	107,790
Detroit	3.4%	76,782
Cleveland-Akron (Canton)	3.0%	69,399
Philadelphia	2.9%	66,446
Cincinnati	2.7%	60,540
Columbus, OH	2.3%	53,157
Miami-Fort Lauderdale	2.1%	47,251

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

## Occupancy Data Analysis 2014

*For each calendar year, property managers were contacted once per quarter to provide data for the preceding three months according to the following schedule:*

	Data Collection for Calendar Year	
	2013	2014
Qtr1: January through March data	April 2013	April 2014
Qtr2: April through June data	July 2013	July 2014
Qtr3: July through September data	October 2013	October 2014
Qtr4: October through December data	January 2014	January 2015

## Occupancy/Daily Rates

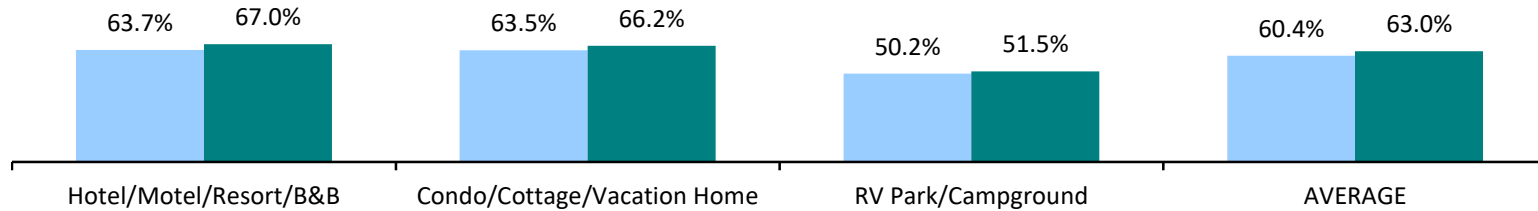
	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2013	2014	% Change	2013	2014	% Change	2013	2014	% Change
Hotel/Motel/Resort/B&B	63.7%	67.0%	5.2%	\$139.54	\$148.75	6.6%	\$88.94	\$99.68	12.1%
Condo/Cottage/Vacation Home	63.5%	66.2%	4.3%	\$173.03	\$184.71	6.8%	\$109.82	\$122.31	11.4%
RV Park/Campground	50.2%	51.5%	2.6%	\$49.37	\$50.78	2.9%	\$24.79	\$26.17	5.6%
<b>AVERAGE</b>	<b>60.4%</b>	<b>63.0%</b>	<b>4.3%</b>	<b>\$129.53</b>	<b>\$136.98</b>	<b>5.8%</b>	<b>\$78.29</b>	<b>\$86.34</b>	<b>10.3%</b>

Q16: What was your overall average occupancy rate January 2013 – December 2013?

Q17: What was your average daily rate (ADR) January 2013 – December 2013?

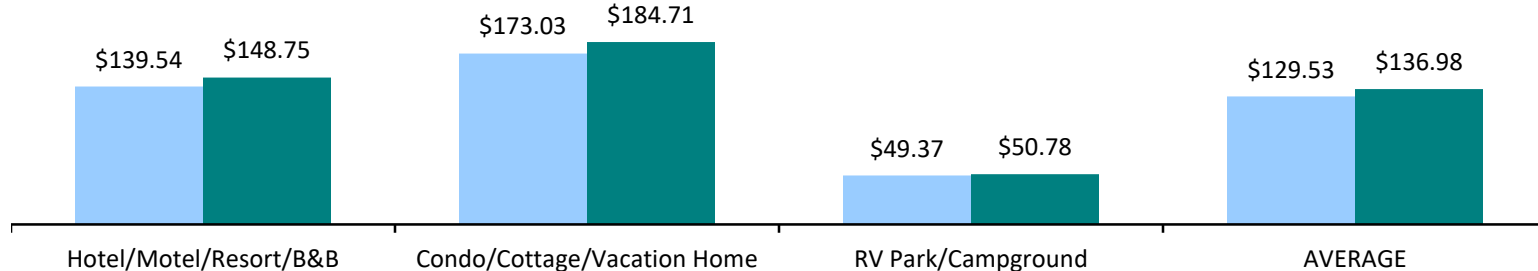
### Average Occupancy Rate

■ 2013 ■ 2014



### Average Daily Rate

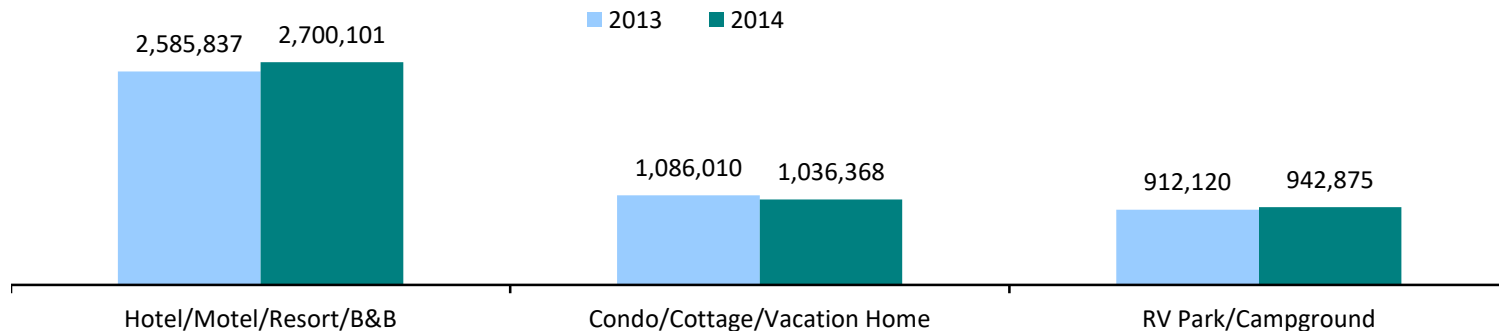
■ 2013 ■ 2014



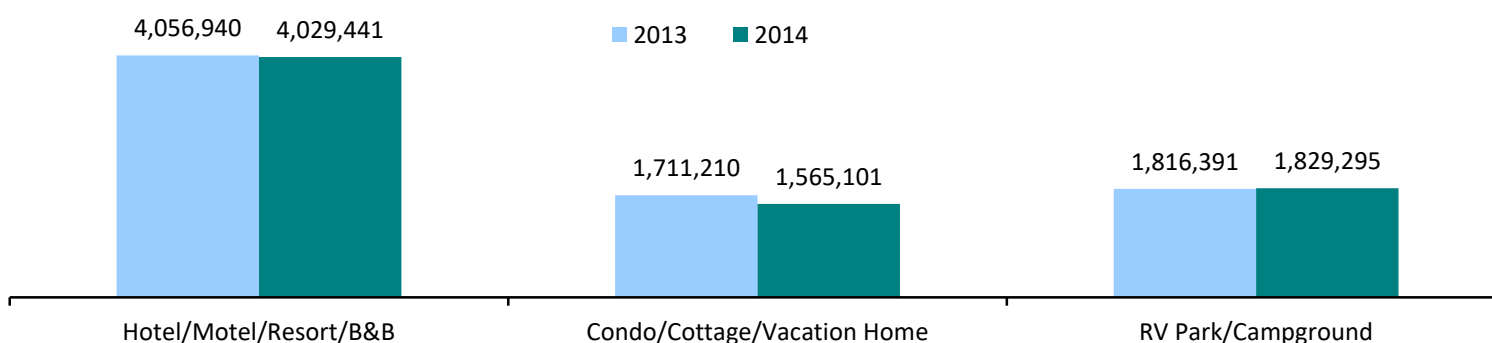
### Room/Unit/Site Nights

	Occupied Room Nights			Available Room Nights		
	2013	2014	% Change	2013	2014	% Change
Hotel/Motel/Resort/B&B	2,585,837	2,700,101	4.4%	4,056,940	4,029,441	-0.7%
Condo/Cottage/Vacation Home	1,086,010	1,036,368	-4.6%	1,711,210	1,565,101	-8.5%
RV Park/Campground	912,120	942,875	3.4%	1,816,391	1,829,295	0.7%
<b>Total</b>	<b>4,583,967</b>	<b>4,679,344</b>	<b>2.1%</b>	<b>7,584,541</b>	<b>7,423,837</b>	<b>-2.1%</b>

**Occupied Room Nights**



**Available Room Nights**

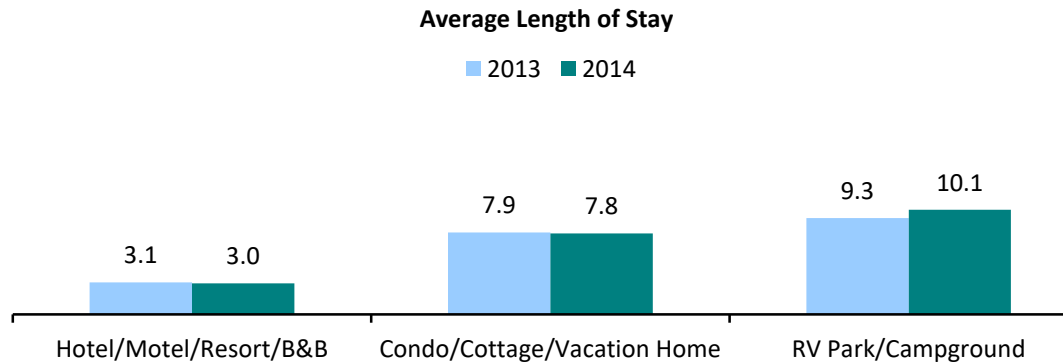
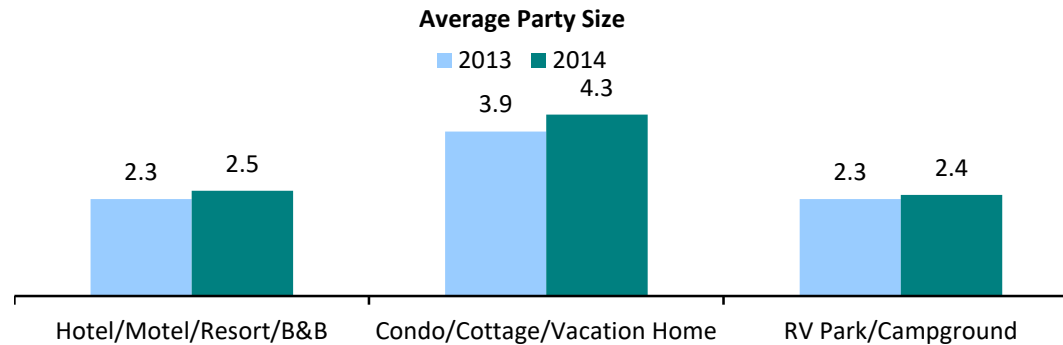


### Average Party Size and Length of Stay

	Average Party Size			Average Length of Stay		
	2013	2014	% Change	2013	2014	% Change
Hotel/Motel/Resort/B&B	2.3	2.5	4.7%	3.1	3.0	-5.2%
Condo/Cottage/Vacation Home	3.9	4.3	9.1%	7.9	7.8	-0.8%
RV Park/Campground	2.3	2.4	1.3%	9.3	10.1	9.6%
<b>Average</b>	<b>2.7</b>	<b>2.8</b>	<b>4.6%</b>	<b>4.6</b>	<b>4.4</b>	<b>-4.3%</b>

Q18: What was your average number of guests per room/site/unit annually?

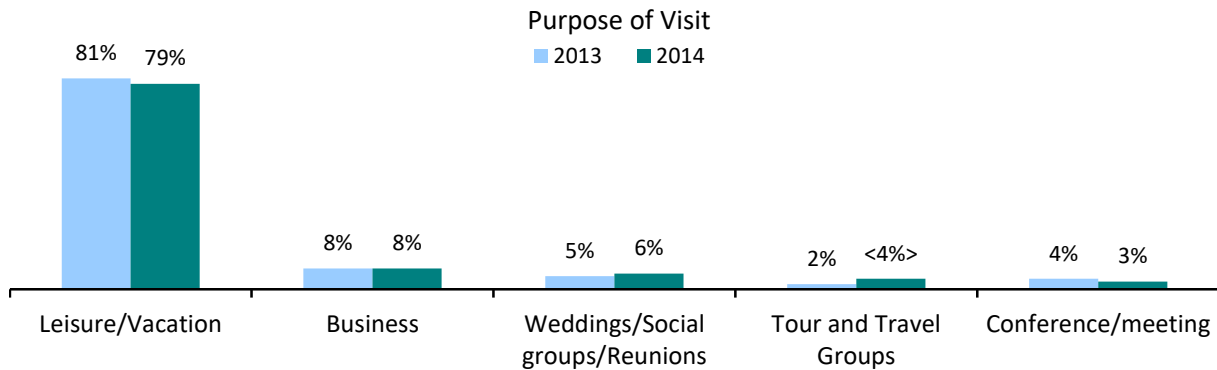
Q19: What was the average length of stay (in nights) of your guests annually?



## Lodging Management Estimates

Guest Profile		
	2013	2014
	A	B
<b>Property Managers Responding</b>	<b>403</b>	<b>390</b>
<u>Purpose of Visit</u>		
Leisure/Vacation	81%	79%
Business	8%	8%
Weddings/Social groups/Reunions (net)	5%	6%
Tour and Travel Groups	2%	4% <sup>a</sup>
Conference/meeting	4%	3%

Q22: What percent of your annual room/site/unit occupancy do you estimate was generated by:





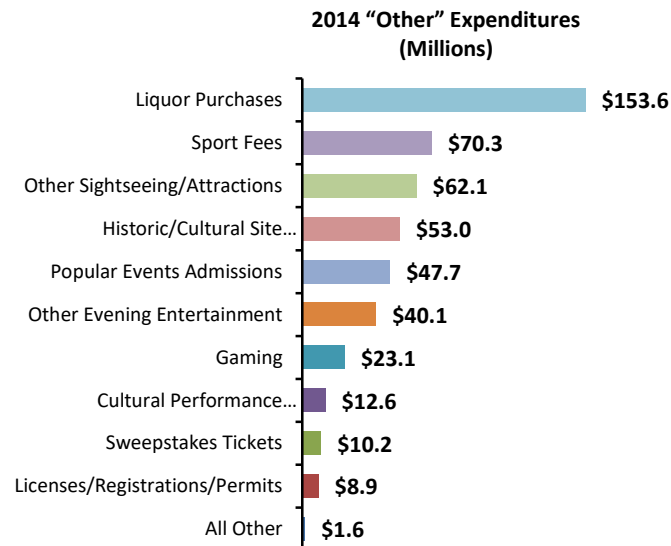
## **Economic Impact Analysis**

### **2014**

## Total Visitor Expenditures by Spending Category

TOTAL EXPENDITURES			
	2013	2014	% Change
<u>TOTAL</u>	<u>\$2,768,140,146</u>	<u>\$2,865,097,777</u>	<u>3.5%</u>
Food and Beverages	\$720,634,723	\$737,024,866	2.3%
Shopping	\$721,407,541	\$739,923,835	2.6%
Lodging Accommodations	\$593,774,716	\$640,962,901	7.9%
Ground Transportation	\$251,195,593	\$264,003,267	5.1%
Other	\$481,127,573	\$483,182,908	0.4%

(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

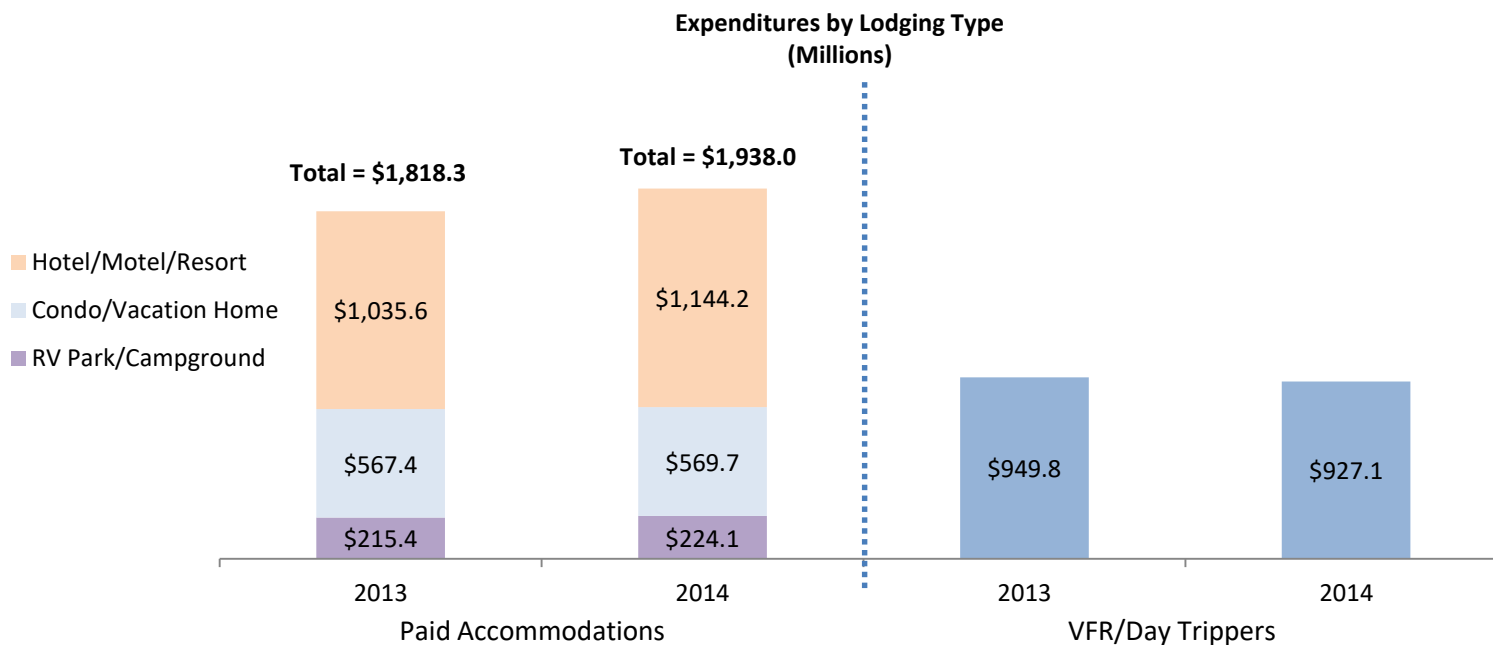
TOTAL EXPENDITURES						
	Staying Paid Accommodations			Visiting Friends and Relatives/Day Trippers		
	2013	2014	% Change	2013	2014	% Change
<b>TOTAL</b>	<u>\$1,818,293,459</u>	<u>\$1,938,003,424</u>	<u>6.6%</u>	<u>\$949,846,687</u>	<u>\$927,094,353</u>	<u>-2.4%</u>
Lodging Accommodations	\$593,774,716	\$640,962,901	7.9%	\$0	\$0	
Food and Beverages	\$408,505,581	\$431,735,827	5.7%	\$312,129,142	\$305,289,039	-2.2%
Shopping	\$399,608,929	\$421,527,189	5.5%	\$321,798,612	\$318,396,646	-1.1%
Ground Transportation	\$150,948,859	\$165,088,374	9.4%	\$100,246,734	\$98,914,893	-1.3%
Other	\$265,455,374	\$278,689,133	5.0%	\$215,672,199	\$204,493,775	-5.2%

“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					
	2013	2014	% Change	2013	2014
<u>TOTAL</u>	<u>\$2,768,140,146</u>	<u>\$2,865,097,777</u>	<u>3.5%</u>	<u>100%</u>	<u>100%</u>
Visiting Friends & Relatives/Day Trippers	\$949,846,687	\$927,094,353	-2.4%	34%	32%
<u>Paid Accommodations</u>	<u>\$1,818,293,459</u>	<u>\$1,938,003,424</u>	<u>6.6%</u>	<u>66%</u>	<u>68%</u>
<i>Hotel/Motel/Resort/B&amp;B</i>	\$1,035,559,526	\$1,144,229,178	10.5%	37%	40%
<i>Condo/Cottage/Vacation Home</i>	\$567,357,233	\$569,689,146	0.4%	20%	20%
<i>RV Park/Campground</i>	\$215,376,700	\$224,085,100	4.0%	8%	8%



## 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.

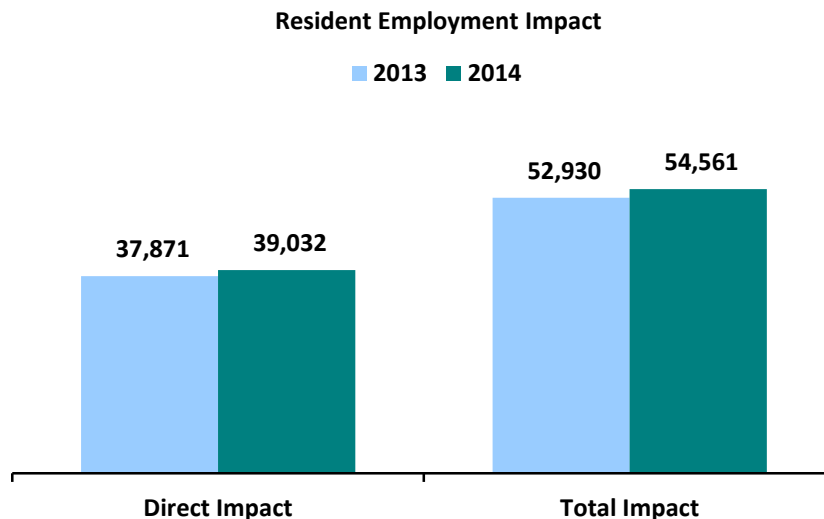
## Impact on Jobs for Lee County Residents

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.).



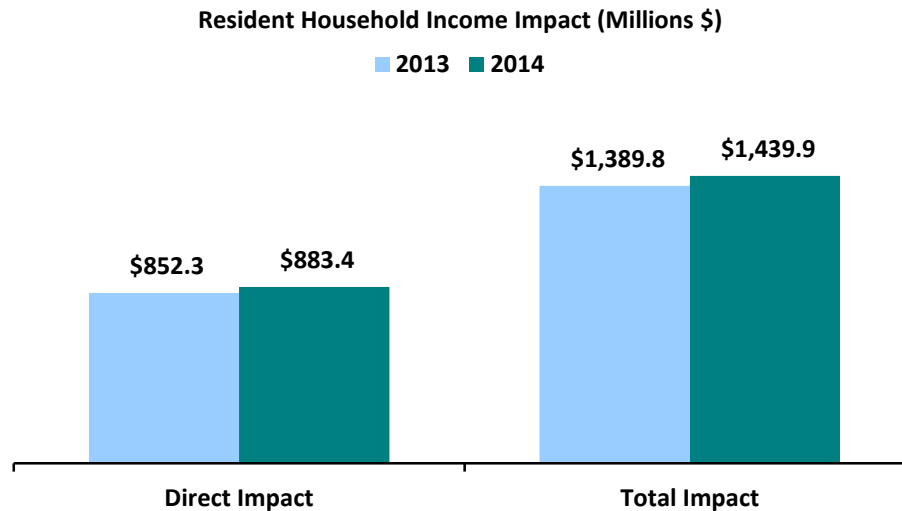
## Impact on Household Income for Lee County Residents

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.

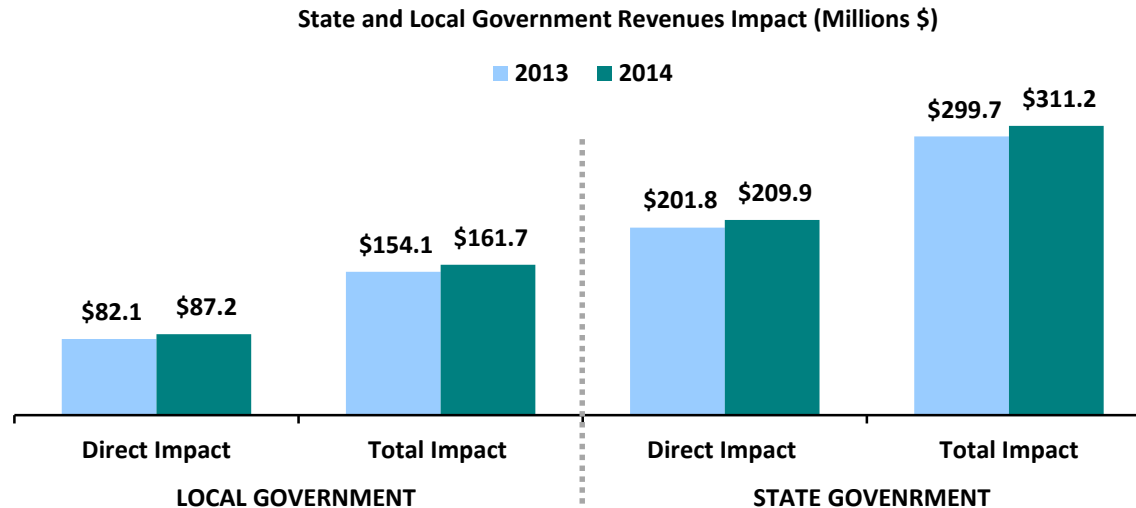
The gross government revenues accruing to governments as a result of producing the output purchased with visitor expenditures is the government revenue impact.

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 2014

## 2014 Interviewing Locations

City	Event/Location
Bonita Springs	Bonita Beach
Cape Coral	Cape Coral Yacht Club
Estero	Miromar Outlets
Fort Myers	Centennial Park
Fort Myers	Crowne Plaza
Fort Myers	Edison-Ford Winter Estates
Fort Myers	Hammond Stadium
Fort Myers	Jet Blue Park (Spring Training)
Fort Myers	Summerlin Square Trolley
Fort Myers	RSW Airport
Fort Myers Beach	Bay to Beach Resort
Fort Myers Beach	Beach Club I
Fort Myers Beach	Best Western PLUS Beach Resort
Fort Myers Beach	Bowditch Point
Fort Myers Beach	Cane Palm Condos
Fort Myers Beach	Casa Playa Resort
Fort Myers Beach	DiamondHead Beach Resort
Fort Myers Beach	Estero Island Beach Club
Fort Myers Beach	Gateway Villas
Fort Myers Beach	Kona Beach Club
Fort Myers Beach	Lani Kai
Fort Myers Beach	Neptune Inn
Fort Myers Beach	Pink Shell Beach Resort
Fort Myers Beach	The Pier
Fort Myers Beach	Times Square
Fort Myers Beach	Winward Passage
North Fort Myers	Shell Factory

City	Event/Location
Sanibel	Casa Ybel
Sanibel	Compass Point
Sanibel	Coquina Beach
Sanibel	Gulf Breeze Cottages
Sanibel	Holiday Inn (Sanibel)
Sanibel	Island Beach Club
Sanibel	Lighthouse Beach
Sanibel	Loggerhead Cay
Sanibel	Ocean Reach
Sanibel	Pelican Roost
Sanibel	Periwinkle Park & Campground
Sanibel	Pointe Santos
Sanibel	Sandalfoot Condos
Sanibel	Sanibel Arms Condominiums
Sanibel	Sanibel Beach Club
Sanibel	Sanibel Cottages
Sanibel	Sanibel Inn
Sanibel	Sanibel Moorings
Sanibel	Sanibel Siesta
Sanibel	Sanibel Surfside
Sanibel	Signal Inn Beach & Racquet Club
Sanibel	Song of the Sea
Sanibel	Sundial Beach Resort & Spa
Sanibel	Tarpon Beach Club
Sanibel	Tarpon Recreation/Tarpon Bay Marina
Sanibel	Tortuga Beach Club
Sanibel	Villa Sanibel

**Seasonal Comparisons:  
Key Statistics  
2014**

	Winter 2014	YOY % Change	Spring 2014	YOY % Change	Summer 2014	YOY % Change	Fall 2014	YOY % Change				
<b>Visitation</b>												
Total Visitation	1,419,998	1.6%	1,365,611	4.2%	1,097,509	4.3%	1,120,452	8.1%				
Paid Accommodations	777,539	6.2%	836,684	13.9%	693,277	11.1%	708,474	15.8%				
Visiting Friends/Relatives	642,459	-3.5%	528,927	-8.1%	404,232	-5.6%	411,978	-3.0%				
<b>Visitor Origin by Country</b>												
United States	84%	654,709	12.5%	81%	675,266	12.7%	69%	476,000	2.6%	65%	462,815	6.7%
Germany	3%	20,858	-44.5%	8%	65,912	37.2%	12%	80,380	48.6%	12%	88,220	34.3%
Canada	7%	52,145	-18.6%	5%	37,664	50.0%	5%	35,166	84.7%	7%	50,218	52.9%
United Kingdom	1%	10,429	-37.1%	3%	24,213	23.2%	7%	45,214	61.2%	9%	62,433	79.8%
Other/No Answer	5%	35,924	30.1%	4%	33,629	-18.9%	8%	56,517	2.6%	6%	44,789	6.1%
<b>Visitor Origin by US Region</b>												
Midwest	55%	362,697	9.5%	51%	345,868	14.8%	36%	169,773	9.3%	45%	208,267	-0.9%
Northeast	20%	133,259	-0.3%	24%	164,699	35.9%	29%	138,040	78.9%	23%	107,439	-2.2%
South (incl. Florida)	13%	82,273	22.1%	22%	149,726	7.2%	33%	155,493	-25.0%	26%	119,010	47.5%
West	3%	17,382	96.7%	2%	14,973	37.2%	3%	12,693	40.8%	6%	28,100	99.6%
No Answer	9%	59,098	44.6%	-	-	-	-	-	-	-	-	-
<b>In-State Visitors</b>	<b>2%</b>	<b>12,747</b>	<b>44.3%</b>	<b>6%</b>	<b>38,929</b>	<b>-25.7%</b>	<b>16%</b>	<b>74,573</b>	<b>-27.7%</b>	<b>9%</b>	<b>42,976</b>	<b>57.9%</b>
<b>Total Visitor Expenditures</b>	<b>\$1,074,709,807</b>	<b>2.3%</b>	<b>\$684,276,923</b>	<b>2.7%</b>	<b>\$479,045,667</b>	<b>2.0%</b>	<b>\$627,065,380</b>	<b>7.8%</b>				
Paid Accommodations	\$763,319,329	3.6%	\$439,766,340	8.7%	\$308,889,274	3.5%	\$426,028,481	12.7%				
Visiting Friends/Relatives	\$311,390,478	-0.5%	\$244,510,583	-6.6%	\$170,156,393	-0.7%	\$201,036,899	-1.3%				

Visitor Profile Survey	Winter 2014	Spring 2014	Summer 2014	Fall 2014
# of Interviews Completed	929	916	935	921
Percentage Flying to Lee County	68%	77%	72%	76%
First-time Visitors	23%	25%	32%	30%
Repeat Visitors	76%	73%	67%	68%
Average Length of Stay	10.0	8.5	8.2	8.2
Satisfaction with Visit				
<i>Very Satisfied/Satisfied</i>	95%	95%	92%	91%
<i>Very Satisfied</i>	62%	64%	55%	54%
<i>Satisfied</i>	34%	31%	37%	37%
Likely to Recommend	89%	89%	89%	84%
Likely to Return	89%	87%	87%	87%
Average Age	57.0	50.6	49.0	51.3
Average Household Income	\$107,587	\$110,493	\$103,189	\$103,875
Married	77%	71%	74%	72%
Traveling as a couple	51%	34%	34%	42%
Traveling as a family	22%	42%	42%	30%
Traveling with children	14%	31%	32%	17%
Average Travel Party Size	2.8	3.5	3.3	3.0

Occupancy Survey	Winter 2014	YOY % Change	Spring 2014	YOY % Change	Summer 2014	YOY % Change	Fall 2014	YOY % Change
<b>Available Roomnights</b>								
Hotel/Motel/Resort/B&B	990,748	-1.6%	1,015,370	-0.7%	996,884	-1.0%	1,026,439	0.6%
Condo/Cottage/Vacation Home	394,464	-12.8%	415,899	-3.6%	376,067	-11.8%	378,671	-5.6%
RV Park/Campground	427,523	-7.4%	499,441	8.3%	467,384	-0.2%	434,947	2.2%
<b>Total</b>	<b>1,812,735</b>	<b>-5.6%</b>	<b>1,930,710</b>	<b>0.8%</b>	<b>1,840,335</b>	<b>-3.2%</b>	<b>1,840,057</b>	<b>-0.4%</b>
<b>Occupied Roomnights</b>								
Hotel/Motel/Resort/B&B	833,418	1.2%	675,936	4.3%	568,125	6.7%	622,622	7.1%
Condo/Cottage/Vacation Home	335,699	-11.8%	296,861	7.9%	169,779	-14.3%	234,029	0.9%
RV Park/Campground	396,768	-3.4%	170,430	1.2%	133,672	2.3%	242,004	19.8%
<b>Total</b>	<b>1,565,886</b>	<b>-3.1%</b>	<b>1,143,227</b>	<b>4.7%</b>	<b>871,576</b>	<b>1.2%</b>	<b>1,098,655</b>	<b>8.2%</b>
<b>Occupancy Rates</b>								
Hotel/Motel/Resort/B&B	84.1%	2.8%	66.6%	5.0%	57.0%	7.8%	60.7%	6.5%
Condo/Cottage/Vacation Home	85.1%	1.1%	71.4%	11.9%	45.1%	-3.0%	61.8%	6.9%
RV Park/Campground	92.8%	4.2%	34.1%	-6.5%	28.6%	2.5%	55.6%	17.2%
<b>Average</b>	<b>86.4%</b>	<b>2.7%</b>	<b>59.2%</b>	<b>3.9%</b>	<b>47.4%</b>	<b>4.6%</b>	<b>59.7%</b>	<b>8.7%</b>
<b>Average Daily Rates</b>								
Hotel/Motel/Resort/B&B	\$186.29	7.2%	\$143.90	9.4%	\$120.58	4.5%	\$129.49	6.1%
Condo/Cottage/Vacation Home	\$238.48	15.1%	\$161.01	-0.1%	\$153.67	5.4%	\$160.18	3.8%
RV Park/Campground	\$59.97	7.6%	\$43.39	1.5%	\$40.54	7.6%	\$46.58	-5.9%
<b>Average</b>	<b>\$165.47</b>	<b>9.1%</b>	<b>\$133.36</b>	<b>6.4%</b>	<b>\$114.75</b>	<b>3.7%</b>	<b>\$117.76</b>	<b>2.4%</b>
<b>RevPAR</b>								
Hotel/Motel/Resort/B7B	\$156.70	10.2%	\$95.80	14.9%	\$68.72	12.6%	\$78.55	13.0%
Condo/Cottage/Vacation Home	\$202.95	16.4%	\$114.93	11.8%	\$69.38	2.3%	\$99.00	10.9%
RV Park/Campground	\$55.66	12.2%	\$14.81	-5.2%	\$11.59	10.2%	\$25.91	10.3%
<b>Average</b>	<b>\$142.94</b>	<b>12.1%</b>	<b>\$78.97</b>	<b>10.5%</b>	<b>\$54.34</b>	<b>8.4%</b>	<b>\$70.31</b>	<b>11.3%</b>

Occupancy Barometer	Winter 2014	Spring 2014	Summer 2014	Fall 2014
<b>Purpose of Visit</b>				
Leisure/Vacation	80%	79%	77%	81%
Business	6%	9%	10%	7%
Conference/ Meeting	4%	3%	3%	4%
Tour and Travel Groups	4%	3%	4%	4%
Weddings/Social Groups/ Reunions NET	6%	6%	6%	5%
<b>Level of Reservations for Next Three Months vs. Last Year</b>				
Up/Same (Net)	91%	88%	86%	91%
Up	56%	61%	59%	63%
Same	35%	27%	27%	28%
Down	8%	10%	8%	8%