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 2015 Visitor Profile and Occupancy Analysis

August 13, 2015

Prepared for:

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

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Executive Summary
Spring 2015

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

For example:

2014 A	2015 B
60%	70%A

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

Executive Summary

Visitation Estimates

- During spring 2015, Lee County hosted approximately 796,000 visitors staying in paid accommodations. Another 504,000 stayed with friends or relatives, for a total of 1.3 million visitors.
- Spring 2015 visitation among paid accommodations guests was down 4.9% from 2014, and visitation among those staying with friends or relatives was down 4.7% year-over-year. As a result, Lee County saw a 4.8% decrease in total visitation versus spring 2014.

Estimated Visitation	Spring 2014	Spring 2015	% Change
Paid Accommodations	836,684	795,752	-4.9%
Friends/Relatives	528,927	504,111	-4.7%
Total Visitation	**1,365,611**	**1,299,863**	**-4.8%**

Visitor Expenditures

- Spring 2015 visitors spent an estimated $705.4 million during their stay in Lee County, which was 3% higher than estimated spending among spring 2014 visitors ($684.3 million).
- Expenditures among spring 2015 paid accommodations guests amounted to $472.6 million (67% of the total). Visitors staying with friends or relatives contributed the remaining $232.9 million. Spending among spring season paid accommodations guests increased 7.5% year-over-year, while Lee County saw a modest decline among the VFR traveler segment (-4.8%).

Estimated Expenditures	Spring 2014	Spring 2015	% Change
Paid Accommodations	$439,766,340	$472,583,652	7.5%
Friends/Relatives	$244,510,583	$232,852,371	-4.8%
Total Expenditures	**$684,276,923**	**$705,436,023**	**3.1%**

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 2015 visitors staying in paid accommodations reside within the United States (83%). The top international feeder market was Canada (6%), followed closely by Germany (5%), and the UK (4%).
- Nearly half of domestic paid accommodations visitors came from the Midwest (46%). The Northeast and South contributed one-quarter each (26% and 23% respectively), and only 5% came from the West.
- New York and Boston were the top domestic feeder markets for the Lee County lodging industry during spring 2015, followed by the key Midwest markets of Chicago, Detroit, and Indianapolis.

Spring 2015 Top DMAs (Paid Accommodations)

New York	7%	49,172
Boston	7%	45,781
Chicago	6%	38,998
Detroit	5%	33,912
Indianapolis	5%	32,216
Columbus, OH	4%	28,825
Minneapolis-Saint Paul	3%	22,043
Philadelphia	3%	20,347
Miami-Fort Lauderdale	3%	16,956
Cincinnati	2%	15,260
Orlando-Daytona Beach-Melbourne	2%	15,260
Tampa-Saint Petersburg	2%	13,565

Visitors Staying in Paid Accommodations

	%		Visitor Estimates		% Change
Spring Season	**2014**	**2015**	**2014**	**2015**	
Country of Origin					
United States	81%	83%	675,266	661,278	-2.1%
Canada	5%	6%	37,664	48,521	28.8%
Germany	8%	5%	65,912	40,203	-39.0%
UK	3%	4%	24,213	29,113	20.2%
Scandinavia	1%	1%	6,726	5,545	-17.6%
BeNeLux	1%	1%	5,381	4,159	-22.7%
France	<1%	<1%	2,690	2,773	3.1%
Switzerland	1%	<1%	10,761	1,386	-87.1%
Latin America	-	<1%	-	1,386	-
Austria	<1%	-	1,345	-	-
Other International	1%	<1%	6,726	1,386	-79.4%

Visitors Staying in Paid Accommodations

	%		Visitor Estimates		% Change
Spring Season	**2014**	**2015**	**2014**	**2015**	
U.S. Region of Origin					
Florida	6%	9%	38,929	59,345	52.4%
South (including Florida)	22%	23%	149,726	152,603	1.9%
Midwest	51%	46%	345,868	303,510	-12.2%
Northeast	24%	26%	164,699	174,645	6.0%
West	2%	5%	14,973	30,521	103.8%

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

Trip Planning

- The majority of spring 2015 visitors planned their Lee County trip well ahead of their arrival. Eight in ten started talking about their Lee County trip *three or more months* in advance, and seven in ten chose the destination within that timeframe. Among those staying in paid accommodations, well over half made their lodging reservations within that window as well.
    - 76% started talking about trip (vs. 78% in 2014)
    - 69% chose Lee County for trip (vs. 71% in 2014)
    - 59% made lodging reservation (vs. 64% in 2014)

- Nine in ten spring visitors claimed to have visited one or more websites when planning their trip to Lee County (89%). Visitors most often mentioned using *airline websites* (40%), followed by *search engines* (31%), *trip advisor* (27%), *booking* (25%), *hotel* (24%) or *vacation rental* (22%) websites.

- Spring 2015 visitors were most likely to report that they typically access destination planning information online via a laptop (59%) or smartphone (53%). Somewhat fewer mentioned using a tablet (45%) or desktop computer (43%).

- The characteristics rated most favorably as influencing the decision to visit Lee County in spring 2015 included:
    - *Peaceful/relaxing (85%);*
    - *Warm weather (84%);*
    - *White sandy beaches* (78%);
    - *Clean, unspoiled environment* (73%); and
    - *A safe destination* (70%).

Visitor Profile

- Three-quarters of visitors flew to the destination (73%), and most of them arrived at Southwest Florida International Airport (81%) – a slight decrease from last year (86%).

- On average, spring 2015 visitors stayed in Lee County for about 7 days, and the majority reported they came to Lee County for a vacation (83%). Six in ten visitors were repeaters (63%) who averaged five trips to Lee County in the past five years. While first-time visitors were the minority overall (34%), among international visitors the proportion who were experiencing Lee County for the first time rose to 58% – a significant increase over last year (30%).

Visitor Profile (cont'd)

- More than half of spring 2015 visitors who reported they were staying in paid accommodations said they stayed overnight in hotel/motel/resort properties (58%), fewer in condo/vacation home properties (40%), and only a small number in RV parks/campgrounds (2%). Nearly all reported that the quality of their lodging either *met expectations* (56%) or *far exceeded/exceeded expectations* (38%).

- Visitors enjoyed various activities while staying in Lee County during spring 2015. Top activities included: *beaches* (89%), *relaxing* (76%), *dining out* (68%), and *swimming* (62%). Half of spring visitors took a day trip outside of Lee County (50%), with many venturing to Naples (30%).

- By and large, visitors continue to be highly satisfied with their stay in Lee County. The majority of spring 2015 visitors indicate they were either *very satisfied* or *satisfied* with their visit (56% and 36% respectively). When compared with the prior year, there was a notable decline in *very satisfied* ratings (56% vs. 64% in 2014), which was driven by international visitors who reported lower satisfaction this year (32% vs. 63% in 2014).

- Nine in ten visitors reported they intend to return to Lee County (86%), with half suggesting they will do so next year (54%). Many visitors also said they will spread the word about their positive experiences, with 83% conveying they will recommend Lee County over other areas in Florida.

- When asked what they liked least about the area, a third of visitors cited *traffic* as negative aspect encountered during their trip (32%) Following at much lower levels of negative mentions were: *insects* (14%), *high prices* (13%), and *beach seaweed* (7%).

- The demographic composition of spring 2015 visitors can be summarized as follows:

  - 52 years of age on average
  - $100,000 household income on average
  - 75% married
  - 44% traveling as a couple
  - 32% traveling as a family
  - 79% traveling *without* children
  - 2 to 3 people in travel party on average

Lodging Industry Assessments

- For the Lee County lodging industry in total, *available* room nights declined 6.4% from spring 2014 to 2015 while *occupied* room nights rose 1.2%. While the hotel/motel/resort category experienced an increase in *occupied* room nights (+6.0%), the condo/vacation home and RV park/campground categories saw decreases.

Spring Season	Occupied Room Nights			Available Room Nights		
	2014	2015	% Change	2014	2015	% Change
Hotel/Motel/Resort/B&B	675,936	716,580	6.0%	1,015,370	1,018,226	0.3%
Condo/Cottage/Vacation Home	296,861	281,514	-5.2%	415,899	384,069	-7.7%
RV Park/Campground	170,430	158,452	-7.0%	499,441	404,417	-19.0%
Total	**1,143,227**	**1,156,546**	**1.2%**	**1,930,710**	**1,806,712**	**-6.4%**

- As a result, the Lee County industry-wide average occupancy rate in spring 2015 was 64.0% -- an 8.1% increase from 59.2% in spring 2014, with each of the lodging categories experiencing positive shifts in occupancy rate.
- Similarly, Lee County's average daily rate increased 7.0% year-over-year. As with occupancy rate, each of the lodging categories saw growth in ADR versus last spring.
- The increases in both average occupancy rate and ADR produced a 15.7% gain in RevPAR performance from spring 2014 to spring 2015. RV parks/campgrounds saw the largest percentage change (+18.1%), but the resulting shifts were quite positive for condos/vacation homes (+15.3%) and hotel/motel/resorts (+9.8%) as well.

Spring Season	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2014	2015	% Change	2014	2015	% Change	2014	2015	% Change
Hotel/Motel/Resort/B&B	66.6%	70.4%	5.7%	$143.90	$149.43	3.8%	$95.80	$105.16	9.8%
Condo/Cottage/Vacation Home	71.4%	73.3%	2.7%	$161.01	$180.73	12.2%	$114.93	$132.47	15.3%
RV Park/Campground	34.1%	39.2%	15.0%	$43.39	$44.65	2.9%	$14.81	$17.49	18.1%
AVERAGE	**59.2%**	**64.0%**	**8.1%**	**$133.36**	**$142.69**	**7.0%**	**$78.97**	**$91.34**	**15.7%**

Lodging Industry Assessments (cont'd)

- Lee County property managers are optimistic about their reservations for the upcoming summer season. The majority of managers responding in early July reported that their total level of reservations for July, August, and September 2015 are *up* over the same period last year or the *same* (45% and 34% respectively), with few claiming that their reservation are *down* (14%).

Spring 2015 Lee County Snapshot

Total Visitation

Spring Season	% 2014	% 2015	Visitor Estimates 2014	Visitor Estimates 2015
Paid Accommodations	61%	61%	836,684	795,752
Friends/Relatives	39%	39%	528,927	504,111
Total Visitation			**1,365,611**	**1,299,863**

Total Visitor Expenditures

Spring Season	2014	2015	% Change
Total Visitor Expenditures	$684,276,923	$705,436,023	3.1%
Paid Accommodations	$439,766,340	$472,583,652	7.5%

Visitor Origin - Visitors Staying in Paid Accommodations

Spring Season	% 2014	% 2015	Visitor Estimates 2014	Visitor Estimates 2015
Florida	6%	9%	38,929	59,345
United States	81%	83%	675,266	661,278
Canada	5%	6%	37,664	48,521
Germany	8%	5%	65,912	40,203
UK	3%	4%	24,213	29,113
Other International	4%	2%	33,629	16,636

First-Time/Repeat Visitors to Lee County

Winter Season	2014	2015
First-time	25%	34%
Repeat	73%	63%

Spring Season	Average Occupancy Rate 2014	Average Occupancy Rate 2015	Average Occupancy Rate % Change	Average Daily Rate 2014	Average Daily Rate 2015	Average Daily Rate % Change	RevPAR 2014	RevPAR 2015	RevPAR % Change
Hotel/Motel/Resort/B&B	66.6%	70.4%	5.7%	$143.90	$149.43	3.8%	$95.80	$105.16	9.8%
Condo/Cottage/Vacation Home	71.4%	73.3%	2.7%	$161.01	$180.73	12.2%	$114.93	$132.47	15.3%
RV Park/Campground	34.1%	39.2%	15.0%	$43.39	$44.65	2.9%	$14.81	$17.49	18.1%
AVERAGE	**59.2%**	**64.0%**	**8.1%**	**$133.36**	**$142.69**	7.0%	**$78.97**	**$91.34**	15.7%

Calendar YTD 2014 Lee County Snapshot

Total Calendar Year Visitation	%		Visitor Estimates	
	2014	2015	2014	2015
Paid Accommodations	58%	58%	1,614,223	1,571,916
Friends/Relatives	42%	42%	1,171,386	1,125,903
Total Visitation			**2,785,609**	**2,697,819**

Total Visitor Expenditures	2014	2015	% Change
Total Visitor Expenditures	$1,758,986,730	$1,834,931,183	4.3%
Paid Accommodations	$1,203,085,669	$1,295,431,024	7.7%

Visitor Origin - Visitors Staying in Paid Accommodations	%		Visitor Estimates	
	2014	2015	2014	2015
Florida	4%	6%	51,193	76,739
US	83%	82%	1,335,175	1,291,506
Canada	6%	7%	91,348	113,243
Germany	5%	5%	83,839	71,451
UK	2%	4%	33,786	55,273
Other International	4%	3%	70,075	40,444

First-Time/Repeat Visitors to Lee County	2014	2015
First-time	24%	31%
Repeat	74%	67%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2014	2015	% Change	2014	2015	% Change	2014	2015	% Change
Hotel/Motel/Resort/B&B	75.2%	79.1%	5.1%	$167.31	$175.41	4.8%	$125.88	$138.76	10.2%
Condo/Cottage/Vacation Home	78.1%	80.8%	3.4%	$202.12	$222.77	10.2%	$157.77	$179.89	14.0%
RV Park/Campground	61.2%	68.0%	11.2%	$54.99	$58.69	6.7%	$33.65	$39.92	18.6%
AVERAGE	**72.4%**	**76.9%**	**6.3%**	**$151.92**	**$162.15**	**6.7%**	**$109.94**	**$124.71**	**13.4%**

Visitor Profile Analysis
Spring 2015

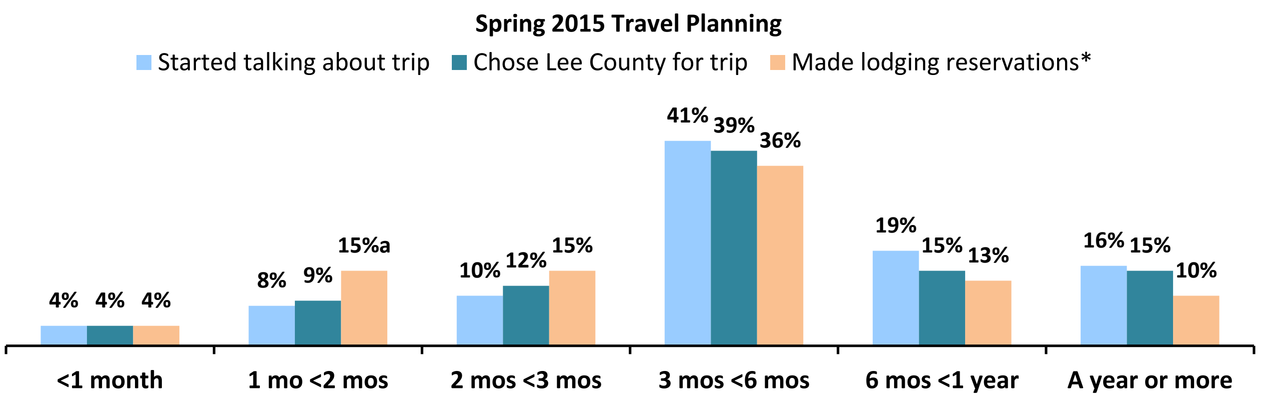
A total of 932 interviews were conducted with visitors in Lee County during the spring months of April, May, and June 2015. A total sample of this size is considered accurate to plus or minus 3.2 percentage points at the 95% confidence level.

A total of 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.

Travel Planning

	Started Talking About Trip		Chose Lee County for Trip		Made Lodging Reservations*	
Spring Season	2014	2015	2014	2015	2014	2015
	A	B	A	B	A	B
Total Respondents	**916**	**932**	**916**	**932**	**625***	**583***
Less than 3 months (NET)	19%	21%	24%	25%	31%	34%
<1 month	3%	4%	3%	4%	5%	4%
1 month - <2 months	6%	8%	9%	9%	11%	15%a
2 months - <3 months	10%	10%	11%	12%	15%	15%
3 months or more (NET)	78%	76%	71%	69%	64%	59%
3 months - <6 months	41%	41%	37%	39%	36%	36%
6 months - <1 year	21%	19%	17%	15%	18%b	13%
A year or more	16%	16%	17%	15%	10%	10%
No Lodging Reservations Made	-	-	-	-	3%	5%
No Answer	3%	3%	5%	6%	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		
	2014	2015
Spring Season	A	B
Total Respondents	**916**	**932**
Any (NET)	96%	96%
Laptop computer	60%	59%
Smartphone (iPhone, Blackberry, etc.)	50%	53%
Tablet (iPad, etc.)	42%	45%
Desktop computer	43%	43%
E-Reader (Nook, Kindle, etc.)	6%	4%
Other portable device	1%	1%
None of these	4%	3%
No Answer	<1%	<1%

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

Travel Websites Visited		
	2014	2015
Spring Season	A	B
Respondents who used A device to plan	**880**	**898**
Visited web sites (NET)	89%	89%
Airline websites	45%	40%
Search Engines	28%	31%
Trip Advisor	23%	27%a
Booking websites	27%	25%
Hotel websites	25%	24%
Vacation rental websites	24%	22%
Visit Florida	7%	12%a
www.FortMyers-Sanibel.com	13%	11%
AAA	7%	8%
Facebook	7%	7%
Other	9%	9%
None/Didn't visit websites	10%	9%
No Answer	<1%	2%a

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

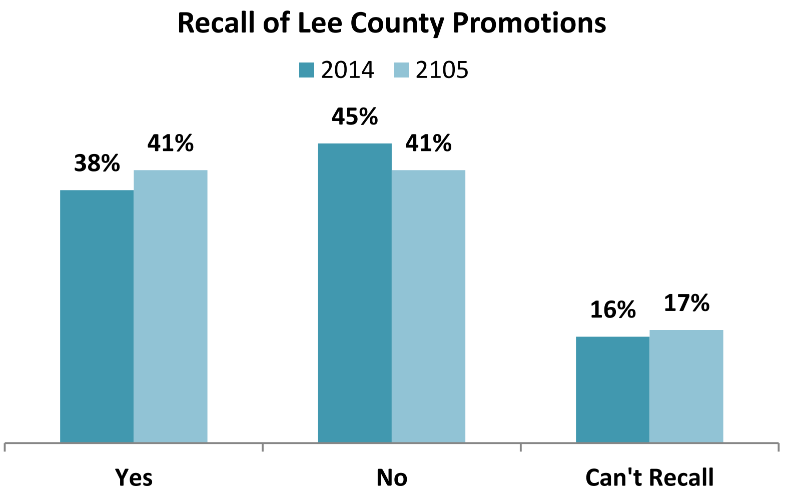
Travel Planning

Travel Information Requested	2014	2015
Spring Season	A	B
Total Respondents	**916**	**932**
Requested information (NET)	30%b	24%
Hotel website	15%b	9%
VCB website	8%	6%
Call hotel	7%b	5%
Visitor Guide	4%	4%
E-Newsletter	1%	1%
Call VCB	1%	-
Call local Chamber of Commerce	<1%	-
Magazine Reader Services Card	<1%	1%
Other	9%	8%
None/Did not request information	65%	71%a
No Answer	4%	5%

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

Recall of Lee County Promotions	2014	2015
Spring Season	A	B
Total Respondents	**916**	**932**
Yes	38%	41%
No	45%	41%
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 Lee County area?

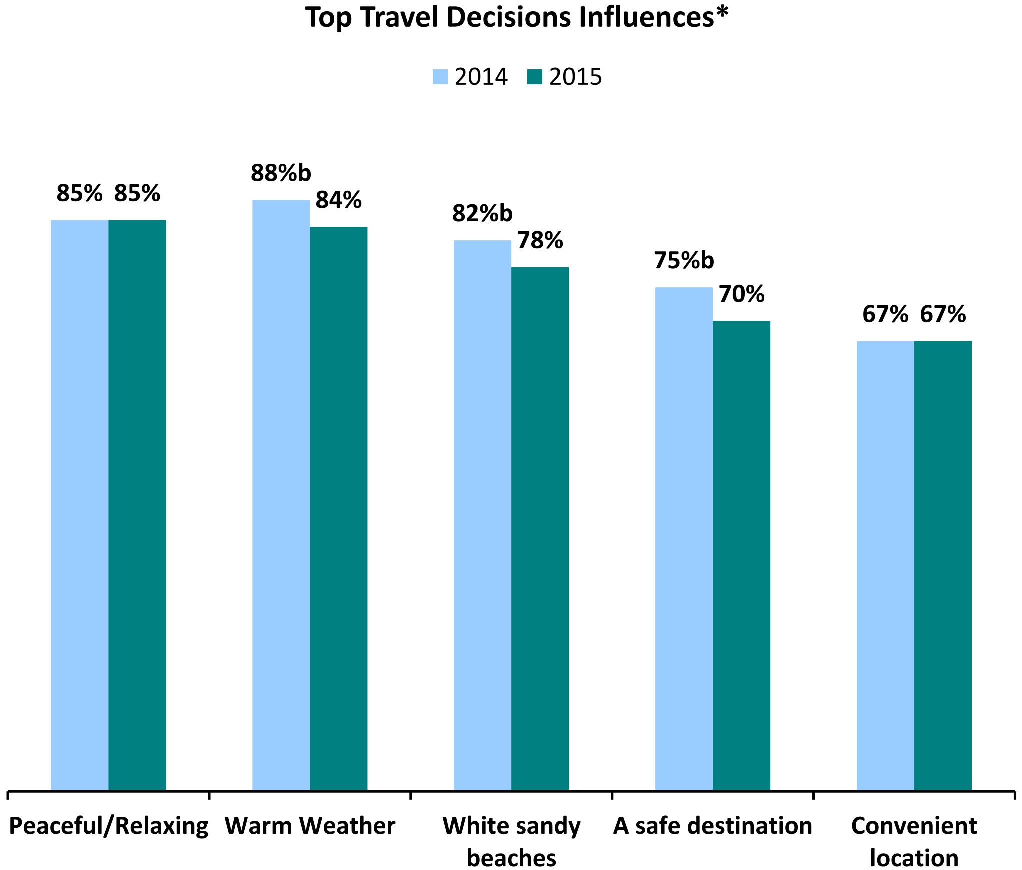


Travel Planning

Travel Decision Influences*		
Spring Season	2014	2015
	A	B
Total Respondents	**916**	**932**
Peaceful/Relaxing	85%	85%
Warm Weather	88%b	84%
White sandy beaches	82%b	78%
Clean, unspoiled environment	74%	73%
A safe destination	75%b	70%
Convenient location	67%	67%
Good value for the money	65%	64%
Plenty to see and do	59%	63%
Reasonably priced lodging	58%	58%
Affordable dining	54%	55%
A "family" atmosphere	62%b	52%
Upscale accommodations	56%b	48%

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)*



Trip Profile

Mode of Transportation		
Spring Season	2014	2015
	A	B
Total Respondents	**916**	**932**
Fly	77%	73%
Drive A personal vehicle	18%	23%a
Drive A rental vehicle	4%	3%
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…

Airport Used		
Spring Season	2014	2015
	A	B
Respondents who flew	**702**	**678**
SW Florida Int'l (Fort Myers)	86%b	81%
Tampa Int'l	2%	6%a
Punta Gorda	4%	5%
Miami Int'l	3%	4%
Orlando Int'l	2%	2%
Ft. Lauderdale Int'l	3%	1%
Other/No Answer	1%	2%

Q2: At which Florida airport did you land?

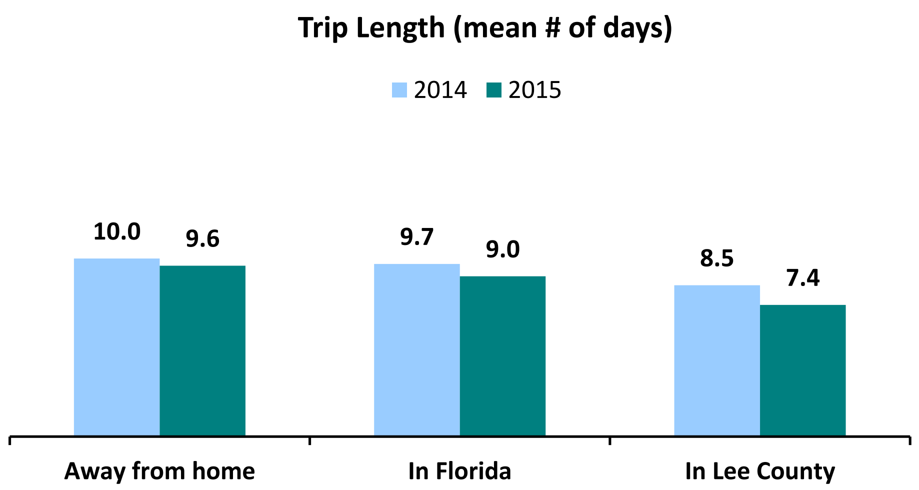
Frequency of Using SWFL Int'l (Past Year)		
Spring Season	2014	2015
Total Respondents	**916**	**932**
One or more trips	63%b	57%
1 trip	45%b	39%
2 to 3 trips	13%	13%
4 to 5 trips	2%	3%
6 or more trips	3%	2%
None/No Answer	37%	43%a

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

Trip Profile

Trip Length Mean # of Days		
Spring Season	2014	2015
	A	B
Total Respondents	**916**	**932**
Away from home	10.0	9.6
In Florida	9.7	9.0
In Lee County	8.5	7.4

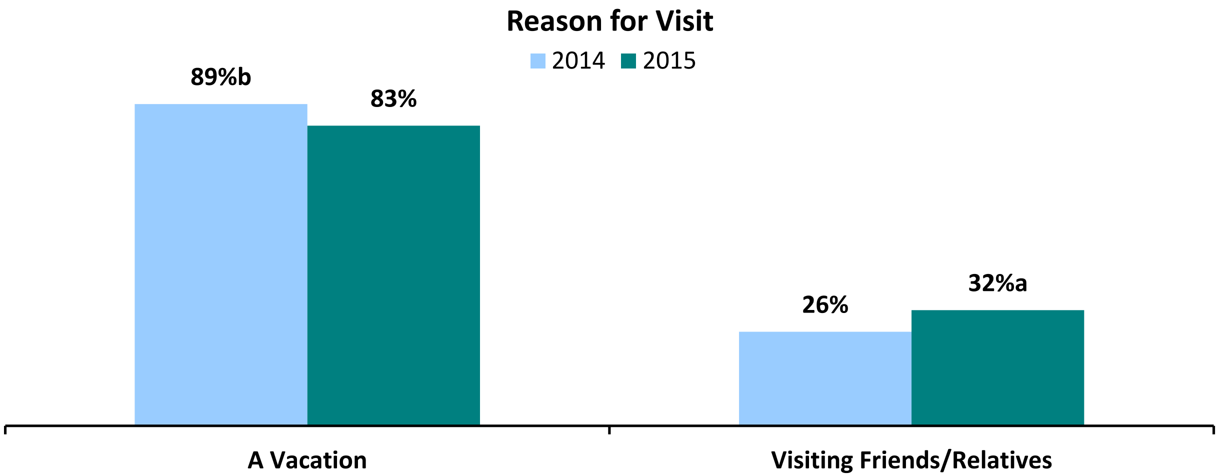
Q4a/b/c: On this trip, how many days will you be:



Trip Profile

Reason(s) for Visit		
Spring Season	2014	2015
	A	B
Total Respondents	**916**	**932**
A Vacation	89%b	83%
Visiting Friends / Relatives	26%	32%a
Personal Business	1%	2%
Sporting Event(s)	2%	2%
A Conference / Meeting	<1%	1%
Other Business Trip	1%	<1%
A Convention / Trade Show	-	<1%
Other/No Answer (NET)	2%	3%

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



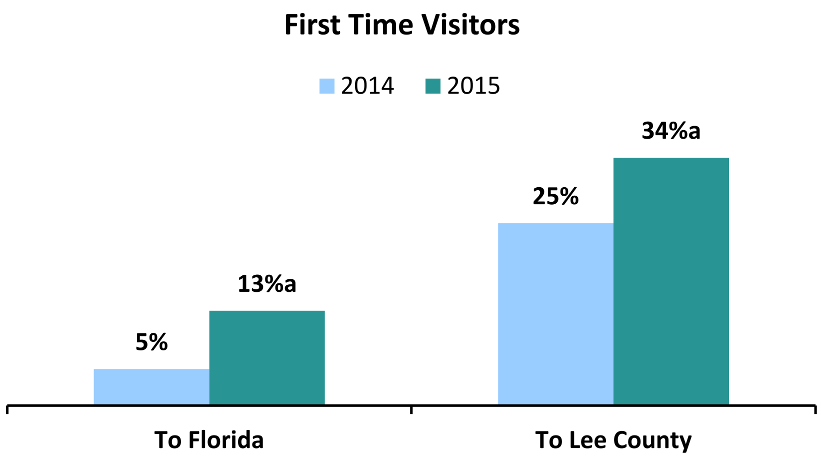
Trip Profile

First Time Visitors to Lee County	Total		Florida Residents		Out-of-State Residents		International Visitors	
Spring Season	2014	2015	2014	2015	2014	2015	2014	2015
	A	B	A	B	A	B	A	B
Total Respondents	**916**	**932**	**35***	**49***	**611**	**557**	**185**	**172**
First-time visitor	25%	34%a	17%	12%	27%	29%	30%	58%a
Repeat visitor	73%b	63%	81%	84%	72%	68%	69%b	40%
No Answer	2%	3%	3%	4%	1%	3%	2%	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	**2014**	**2015**
Total Respondents	**916**	**932**
	A	**B**
Yes, first-time visitor	5%	13%a
No	90%b	79%
No answer	1%	2%
*FL Residents**	4%	5%

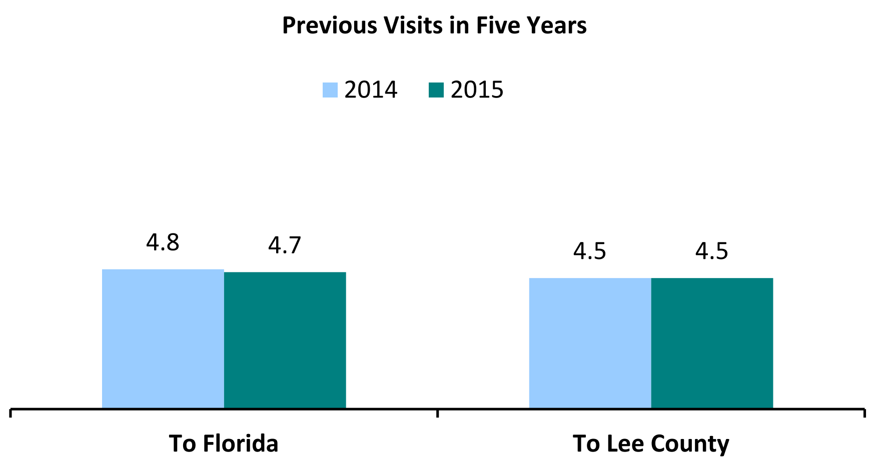
Q13: Is this your first visit to Florida?
**Florida residents are shown as A proportion of total visitor interviews conducted, though FL residents are not asked this question .*



Trip Profile

Previous Visits in Five Years				
Spring Season	Mean # of Visits to Florida		Mean # of Visits to Lee County	
	2014	2015	2014	2014
	A	B	A	B
Base: Repeat Visitors	**821** (FL res. Excl)	**738**	**668**	**591**
Number of visits	4.8	4.7	4.5	4.5

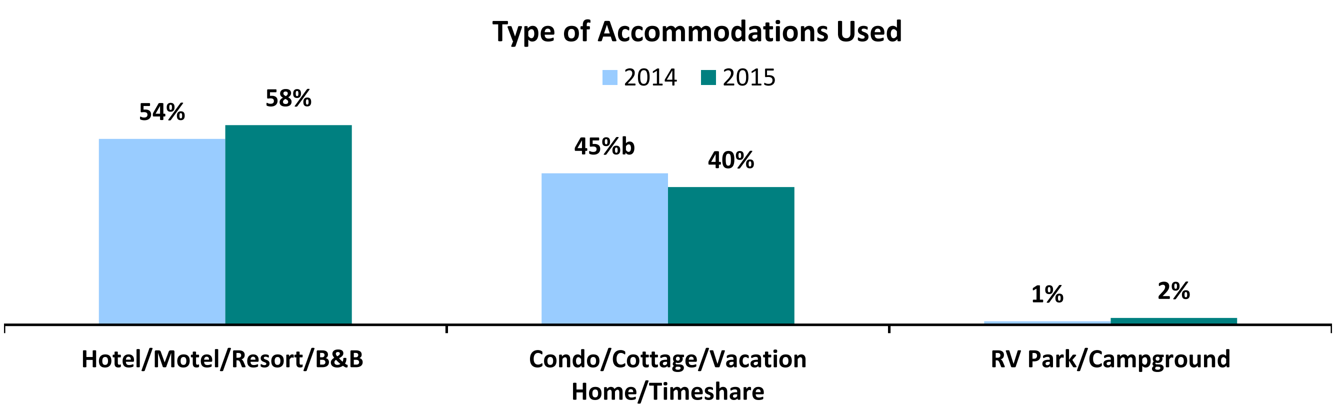
Q14: Over the past five (5) years, how many times have you visited Florida?
Q16: Over the past five (5) years, how many times have you visited Lee County?



Trip Profile

Type of Accommodations Used		
Spring Season	**2014**	**2015**
	A	**B**
Total respondents staying in paid accommodations	**625**	**583**
Hotel/Motel/Resort/B&B (NET)	54%	58%
At a hotel/motel/historic inn	29%	40%a
At a resort	26%	18%
At a Bed and Breakfast	<1%	<1%
Condo/Cottage/Vacation Home/Timeshare (NET)	44%	40%
RV Park/Campground (NET)	1%	2%

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



Trip Profile

Quality of Accommodations		
Spring Season	2014	2015
	A	B
Total respondents staying in paid accommodations	**625**	**583**
Far exceeded/Exceeded expectations	44%b	38%
Met your expectations	51%	56%
Did not meet/Far below expectations	3%	4%
No Answer	2%	2%

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

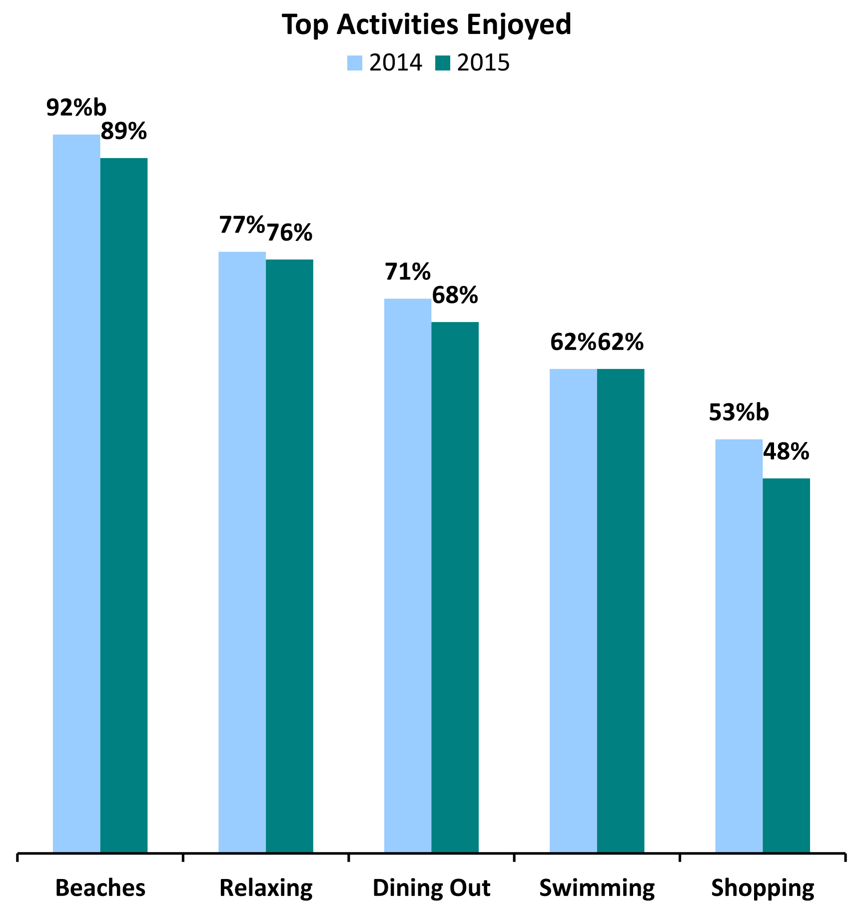
Ratings by Subgroup	First-Timers		Repeaters		U.S. Residents		International Residents	
Spring Season	2014	2015	2014	2015	2014	2015	2014	2015
	A	B	A	B	A	B	A	B
Total respondents staying in paid accommodations	**184**	**206**	**432**	**362**	**502**	**477**	**120**	**97**
Far exceeded/Exceeded expectations	44%	37%	44%	39%	42%	41%	54%b	24%
Met your expectations	50%	53%	52%	58%	54%	54%	43%	69%a
Did not meet/Far below expectations	4%	7%	2%	2%	3%	4%	-	2%
No Answer	2%	4%	2%	1%	1%	2%	3%	5%

THE BEACHES OF FORT MYERS AND SANIBEL

Trip Activities

Activities Enjoyed		
Spring Season	2014	2015
	A	B
Total Respondents	**916**	**932**
Beaches	92%b	89%
Relaxing	77%	76%
Dining Out	71%	68%
Swimming	62%	62%
Shopping	53%b	48%
Sightseeing	33%	43%a
Shelling	38%	40%
Visiting Friends/Relatives	25%	30%a
Attractions	25%	27%
Watching Wildlife	21%	26%a
Photography	18%	19%
Birdwatching	13%	16%
Bicycle Riding	17%	15%
Exercise/Working Out	17%b	13%
Bars/Nightlife	14%	13%
Boating	12%	12%
Fishing	14%	11%
Golfing	9%	9%
Guided Tour	7%	9%
Kayaking / Canoeing	7%	7%
Miniature Golf	8%	7%
Parasailing / Jet Skiing	6%	6%
Cultural Events	4%	5%
Sporting Event	5%	5%
Tennis	5%b	3%
Scuba Diving/Snorkeling	2%	2%
Other	3%	2%
No Answer	1%	2%

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



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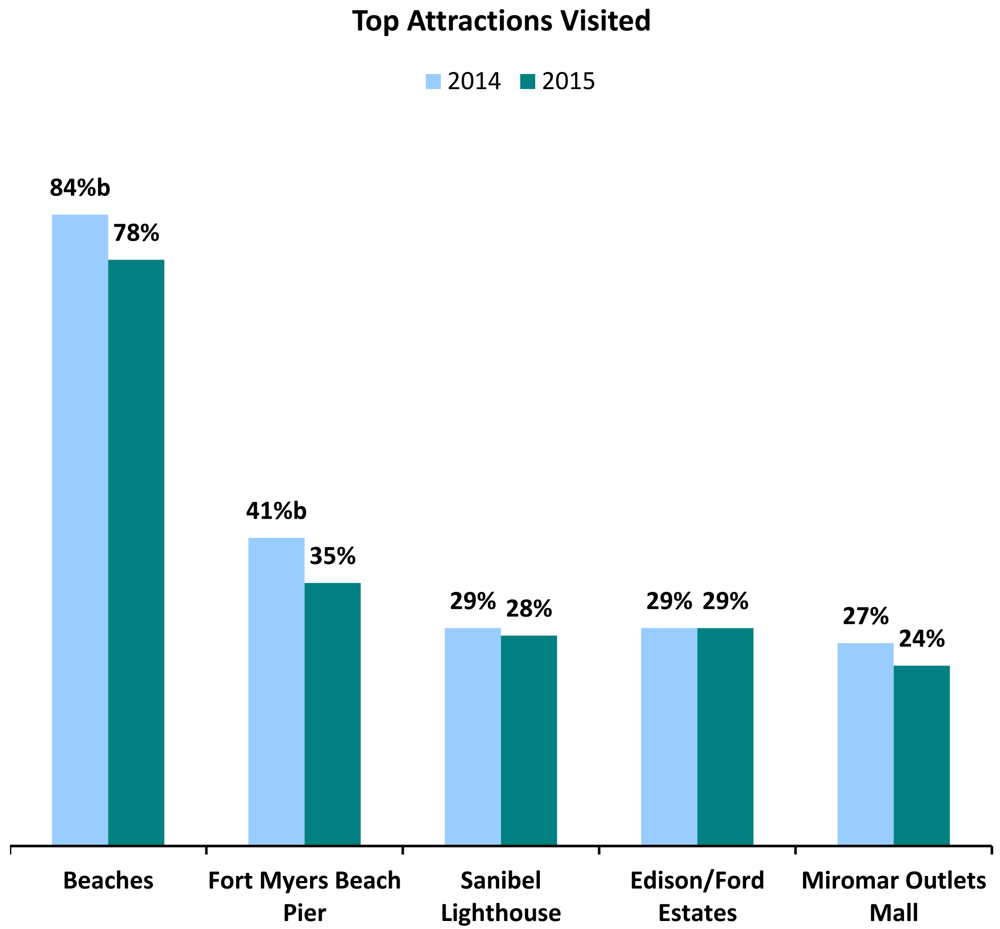
Trip Activities

Attractions Visited		
Spring Season	2014	2015
	A	B
Total Respondents	**916**	**932**
Beaches	84%b	78%
Fort Myers Beach Pier	41%b	35%
Edison/Ford Estates	29%	29%
Sanibel Lighthouse	29%	28%
Miromar Outlets Mall	27%	24%
Tanger Outlet Center	22%b	18%
Ding Darling National Wildlife Refuge	18%	16%
Periwinkle Place	13%	12%
Coconut Point Mall	13%	10%
Shell Factory and Nature Park	11%b	7%
Gulf Coast Town Center	8%	7%
Bell Tower Shops	10%b	6%
Edison Mall	8%b	5%
Manatee Park	4%	4%
Bailey-Matthews Shell Museum	4%	3%
Barbara B. Mann Performing Arts Hall	1%	1%
Broadway Palm Dinner Theater	2%	1%
Babcock Wilderness Adventures	1%	1%
Other	5%	5%
None/No Answer	3%	4%

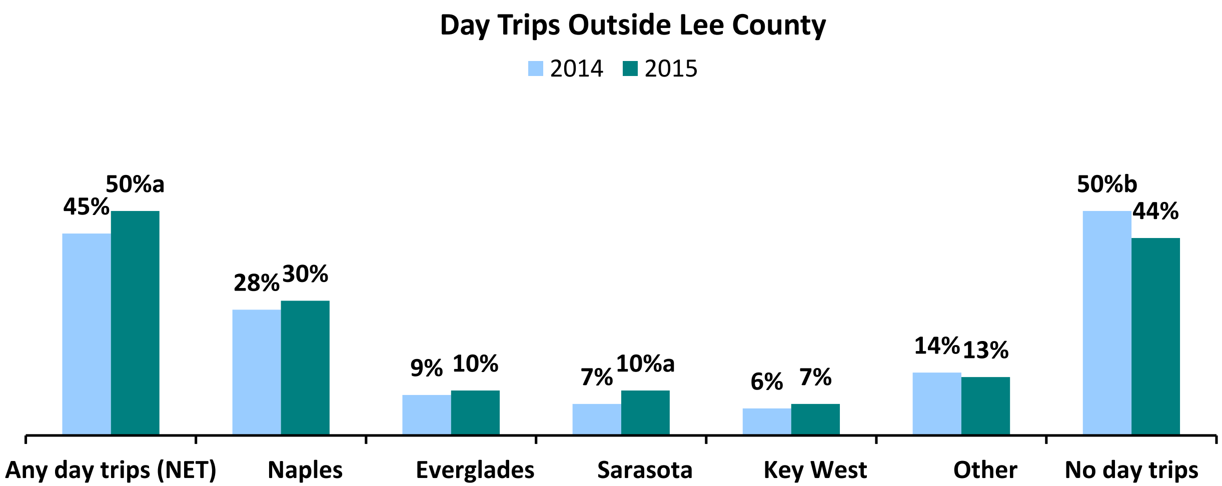
Q24. On this trip, which attractions are you visiting? *(Please mark ALL that apply.)*



Trip Activities

Day Trips Outside Lee County		
Spring Season	2014	2015
	A	B
Total Respondents	**916**	**932**
Any day trips (NET)	45%	50%a
Naples	28%	30%
Everglades	9%	10%
Sarasota	7%	10%a
Key West	6%	7%
Other	14%	13%
No day trips	50%b	44%
No Answer	14%	14%

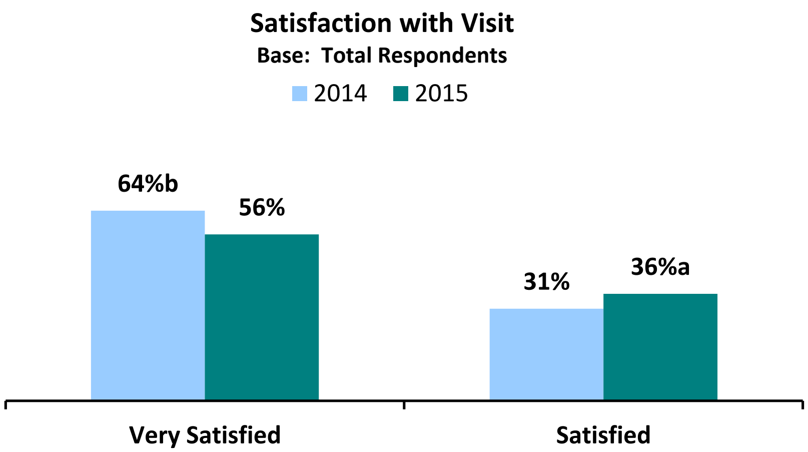
Q25: Where did you go on day trips outside Lee County?



Lee County Experience

Satisfaction with Visit		
	Total Respondents	
Spring Season	2014	2015
	A	B
Total Respondents	**916**	**932**
Very Satisfied/Satisfied	95%b	91%
Very Satisfied	64%b	56%
Satisfied	31%	36%a
Neither	1%	2%
Dissatisfied/Very Dissatisfied	1%	<1%
Don't know/no answer	3%	7%a

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



Ratings by Subgroup	First-Timers		Repeaters		U.S. Residents		International Residents	
Spring Season	2014	2015	2014	2015	2014	2015	2014	2015
	A	B	A	B	A	B	A	B
Total Respondents	**233**	**317**	**668**	**591**	**725**	**746**	**185**	**172**
Very Satisfied/Satisfied	91%	86%	96%	94%	96%b	92%	93%	89%
Very Satisfied	53%b	39%	68%	65%	64%	61%	63%b	32%
Satisfied	38%	47%a	29%	30%	32%	31%	30%	58%a

Future Plans

Likelihood to Recommend/Return to Lee County		
Spring Season	**2014**	**2015**
	A	**B**
Total Respondents	**916**	**932**
Likely to Recommend Lee County	89%b	83%
Likely to Return to Lee County	87%	86%
Base: Total Respondents Planning to Return	**799**	**801**
Likely to Return Next Year	54%	54%

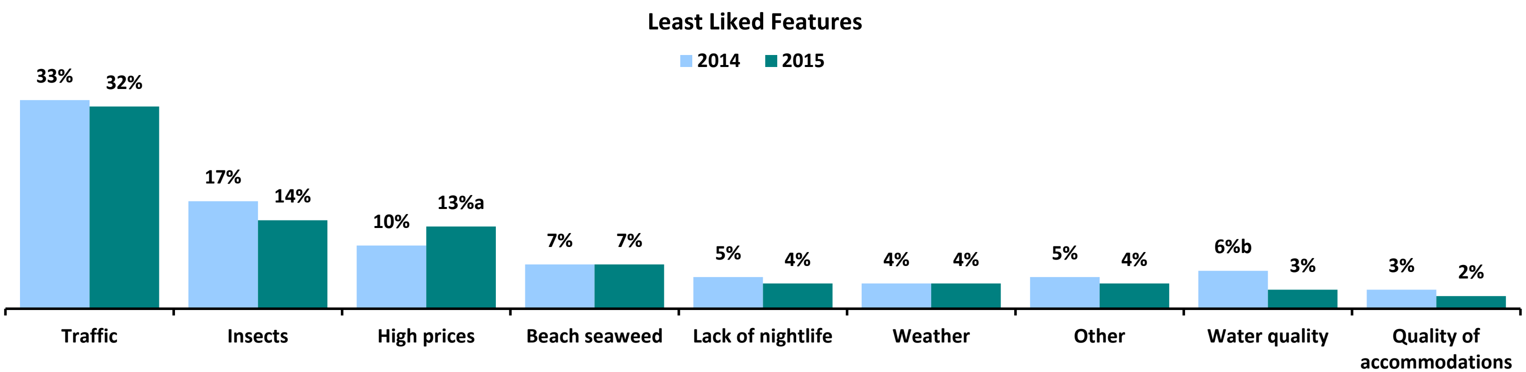
Q27: Would you recommend Lee County to A friend over other vacation areas in Florida?
Q31: Will you come back to Lee County?
Q32: Will you come back next year?

Ratings by Subgroup								
	First-Timers		**Repeaters**		**U.S. Residents**		**International Residents**	
Spring Season	**2014**	**2015**	**2014**	**2015**	**2014**	**2015**	**2014**	**2015**
	A	**B**	**A**	**B**	**A**	**B**	**A**	**B**
Total Respondents	**233**	**317**	**668**	**591**	**725**	**746**	**185**	**172**
Likely to Recommend Lee County	83%b	71%	92%	90%	89%a	85%	91%a	75%
Likely to Return to Lee County	72%	75%	93%	92%	88%	87%	86%	83%
Base: Total Respondents Planning to Return	**168**	**237**	**621**	**545**	**638**	**651**	**159**	**143**
Likely to Return Next Year	21%	29%a	63%	65%	55%	56%	52%	44%

Trip Activities

Least Liked Features		
Spring Season	2014	2015
	A	B
Total Respondents	**916**	**932**
Traffic	33%	32%
Insects	17%	14%
High prices	10%	13%a
Beach seaweed	7%	7%
Lack of nightlife	5%	4%
Weather	4%	4%
Other	5%	4%
Water quality	6%b	3%
Quality of accommodations	3%	2%
Red Tide	2%	1%
Nothing/No Answer (NET)	37%	39%

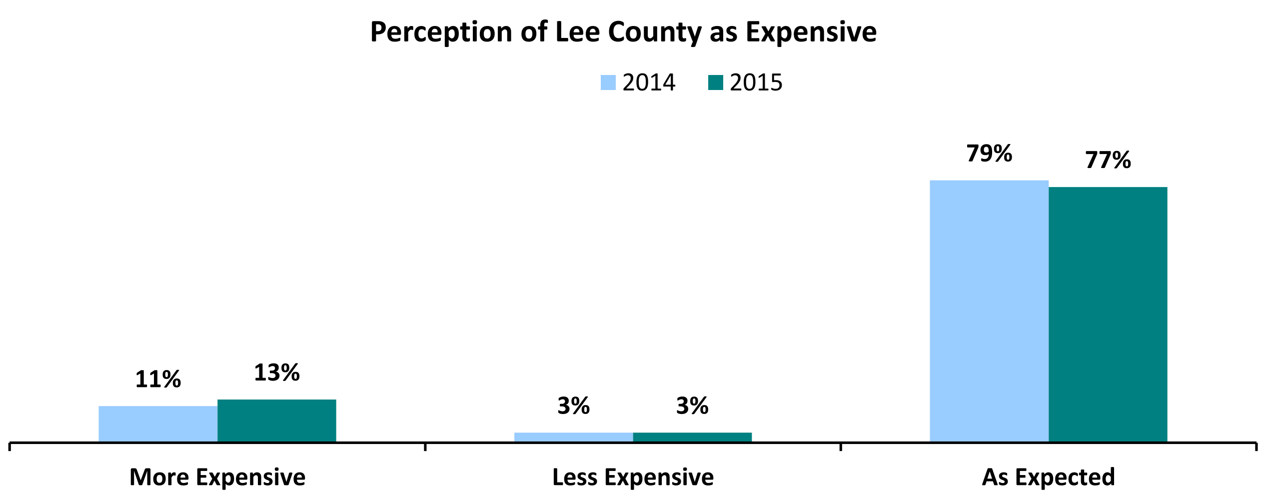
Q29: During this specific visit, which features have you liked **LEAST** about our area? (*Please mark ALL that apply.)*



Trip Activities

Perception of Lee County as Expensive		
Spring Season	2014	2015
	A	B
Total Respondents	**916**	**932**
More Expensive	11%	13%
Less Expensive	3%	3%
As Expected	79%	77%
Don't know/No Answer (NET)	6%	7%

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



Visitor and Travel Party Demographic Profile

Visitor Demographic Profile		
Spring Season	**2014**	**2015**
	A	**B**
Total Respondents	**916**	**932**
Age of respondent (mean)	50.6	52.2a
Annual household income (mean)	$110,493	$100,152
Martial Status		
Married	71%	75%
Single	14%	12%
Vacations per year (mean)	2.8	3.0
Short getaways per year (mean)	3.7	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	**2014**	**2015**
	A	**B**
Total Respondents	**916**	**932**
Couple	34%	44%a
Family	42%b	32%
Group of couples/friends	13%	13%
Single	7%	8%
Mean travel party size	3.5	2.9
Mean adults in travel party	2.8b	2.5

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	**2014**	**2015**
	A	**B**
Total Respondents	**916**	**932**
Traveling with any Children (net)	31%b	21%
Any younger than 6	13%b	7%
Any ages 6-11	14%b	9%
Any 12-17 years old	16%b	11%
No Children	69%	79%a

Q19: How many of those people are:
Younger than 6 years old/ 6-11 years old/ 12-17 years old/ Adults

THE BEACHES OF FORT MYERS AND SANIBEL

Visitor Origin and Visitation Estimates

Total Visitation

	%		Visitor Estimates		
Spring Season	**2014**	**2015**	**2014**	**2015**	**% Change**
Paid Accommodations	61%	61%	836,684	795,752	-4.9%
Friends/Relatives	39%	39%	528,927	504,111	-4.7%
Total Visitation			**1,365,611**	**1,299,863**	**-4.8%**

Visitor Origin (Paid Accommodation Guests)

Spring Season	%		Visitor Estimates		
Country of Origin	**2014**	**2015**	**2014**	**2015**	**% Change**
United States	81%	83%	675,266	661,278	-2.1%
Canada	5%	6%	37,664	48,521	28.8%
Germany	8%	5%	65,912	40,203	-39.0%
UK	3%	4%	24,213	29,113	20.2%
Scandinavia	1%	1%	6,726	5,545	-17.6%
BeNeLux	1%	1%	5,381	4,159	-22.7%
France	<1%	<1%	2,690	2,773	3.1%
Switzerland	1%	<1%	10,761	1,386	-87.1%
Latin America	-	<1%	-	1,386	-
Austria	<1%	-	1,345	-	-
Other International	1%	<1%	6,726	1,386	-79.4%

U.S. Region of Origin	2014	2015	2014	2015	% Change
Florida	6%	9%	38,929	59,345	52.4%
South (including Florida)	22%	23%	149,726	152,603	1.9%
Midwest	51%	46%	345,868	303,510	-12.2%
Northeast	24%	26%	164,699	174,645	6.0%
West	2%	5%	14,973	30,521	103.8%

Spring 2015 Top DMAs (Paid Accommodations)

New York	7%	49,172
Boston	7%	45,781
Chicago	6%	38,998
Detroit	5%	33,912
Indianapolis	5%	32,216
Columbus, OH	4%	28,825
Minneapolis-Saint Paul	3%	22,043
Philadelphia	3%	20,347
Miami-Fort Lauderdale	3%	16,956
Cincinnati	2%	15,260
Orlando-Daytona Beach-Melbourne	2%	15,260
Tampa-Saint Petersburg	2%	13,565

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

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THE BEACHES OF FORT MYERS AND SANIBEL

Occupancy Data Analysis
Spring 2015

For the 2015 spring season, property managers were interviewed in July 2015 to provide data for each specific month of the season (April, May, and June 2015).

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).

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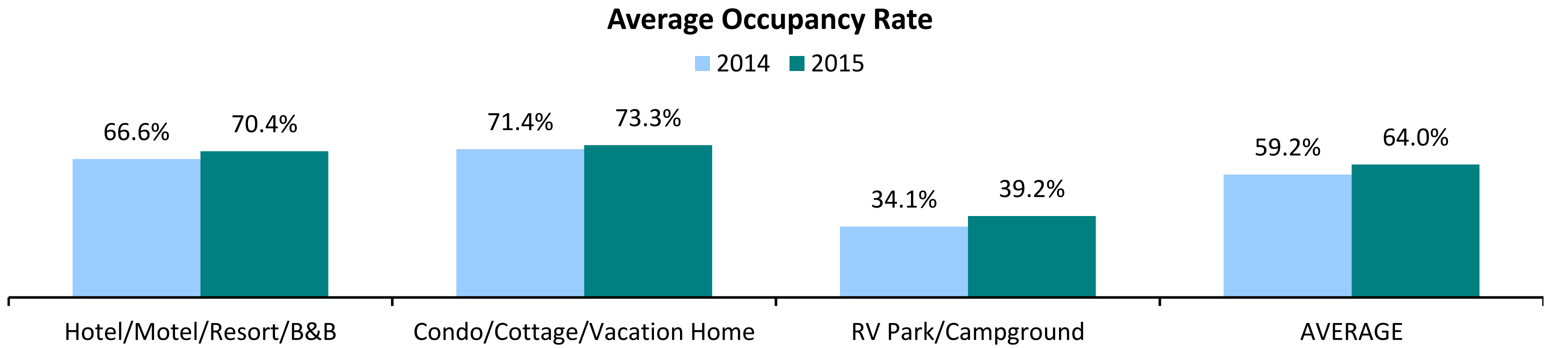
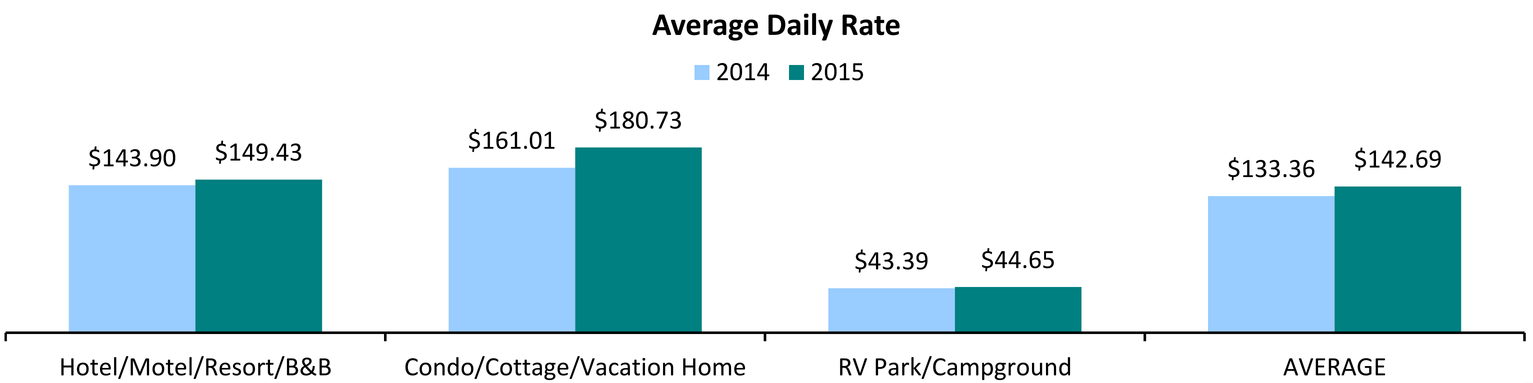
Occupancy/Daily Rates

	Average Occupancy Rate			Average Daily Rate			RevPAR		
Spring Season	**2014**	**2015**	**% Change**	**2014**	**2015**	**% Change**	**2014**	**2015**	**% Change**
Hotel/Motel/Resort/B&B	66.6%	70.4%	5.7%	$143.90	$149.43	3.8%	$95.80	$105.16	9.8%
Condo/Cottage/Vacation Home	71.4%	73.3%	2.7%	$161.01	$180.73	12.2%	$114.93	$132.47	15.3%
RV Park/Campground	34.1%	39.2%	15.0%	$43.39	$44.65	2.9%	$14.81	$17.49	18.1%
AVERAGE	**59.2%**	**64.0%**	**8.1%**	**$133.36**	**$142.69**	**7.0%**	**$78.97**	**$91.34**	**15.7%**

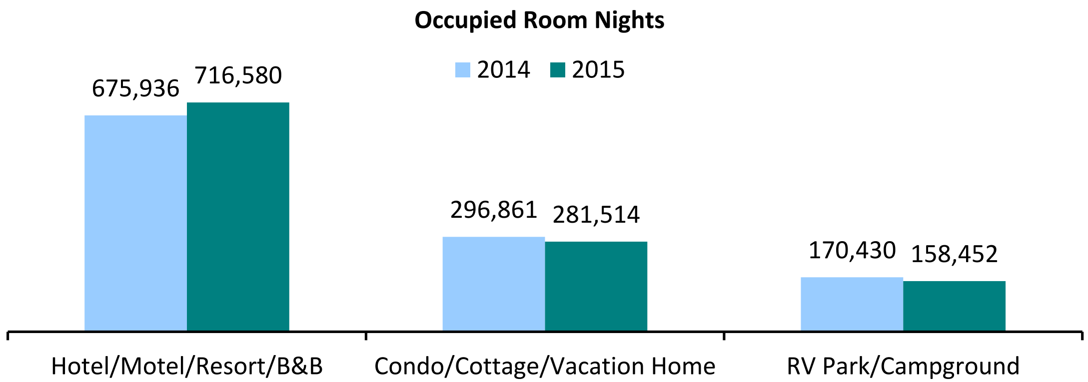
Q16: What was your overall average occupancy rate for the month of [April/May/June]?
Q17: What was your average daily rate (ADR) in [April/May/June]?

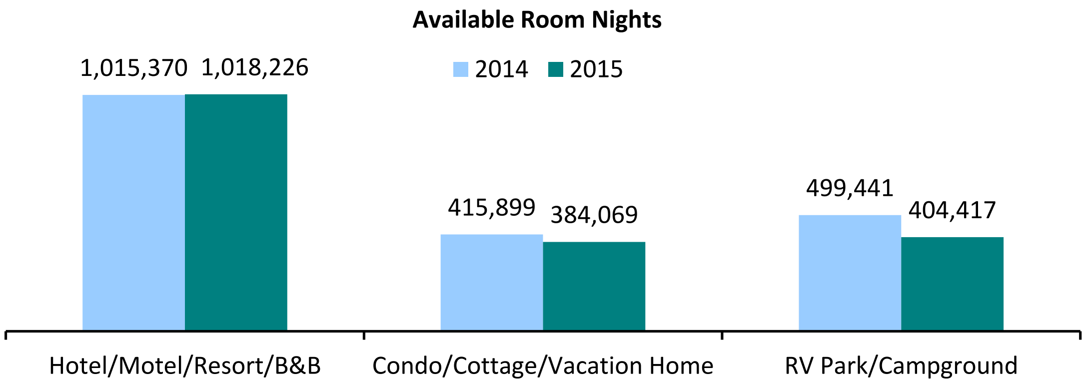




Room/Unit/Site Nights

	Occupied Room Nights			Available Room Nights		
Spring Season	**2014**	**2015**	**% Change**	**2014**	**2015**	**% Change**
Hotel/Motel/Resort/B&B	675,936	716,580	6.0%	1,015,370	1,018,226	0.3%
Condo/Cottage/Vacation Home	296,861	281,514	-5.2%	415,899	384,069	-7.7%
RV Park/Campground	170,430	158,452	-7.0%	499,441	404,417	-19.0%
Total	**1,143,227**	**1,156,546**	**1.2%**	**1,930,710**	**1,806,712**	**-6.4%**



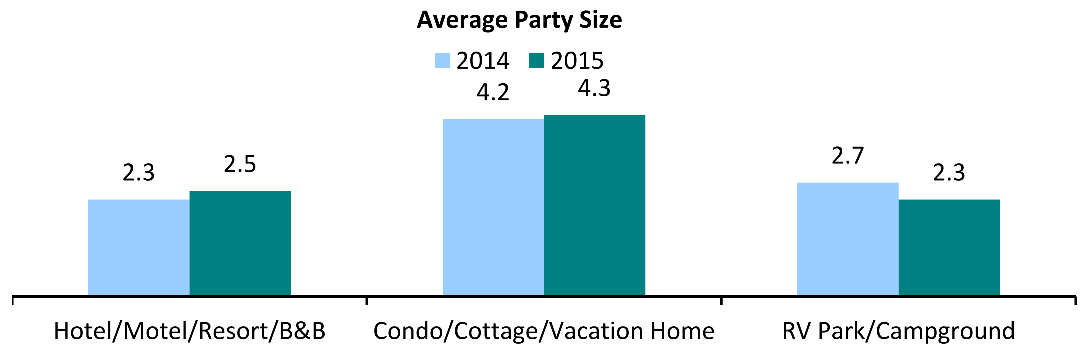


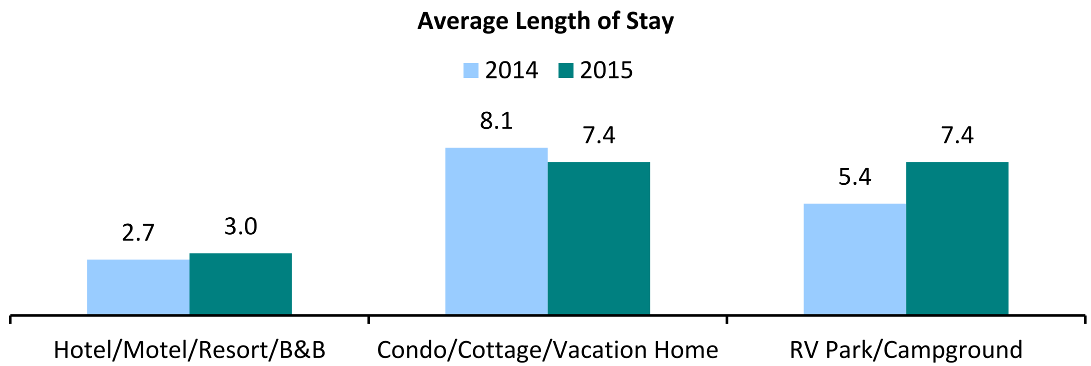
Average Party Size and Length of Stay

	Average Party Size			Average Length of Stay		
Spring Season	**2014**	**2015**	**% Change**	**2014**	**2015**	**% Change**
Hotel/Motel/Resort/B&B	2.3	2.5	8.7%	2.7	3.0	11.1%
Condo/Cottage/Vacation Home	4.2	4.3	2.4%	8.1	7.4	-8.6%
RV Park/Campground	2.7	2.3	-14.8%	5.4	7.4	37.0%
Average	**2.9**	**2.9**	0.0%	**3.9**	**4.2**	7.7%

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]?

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

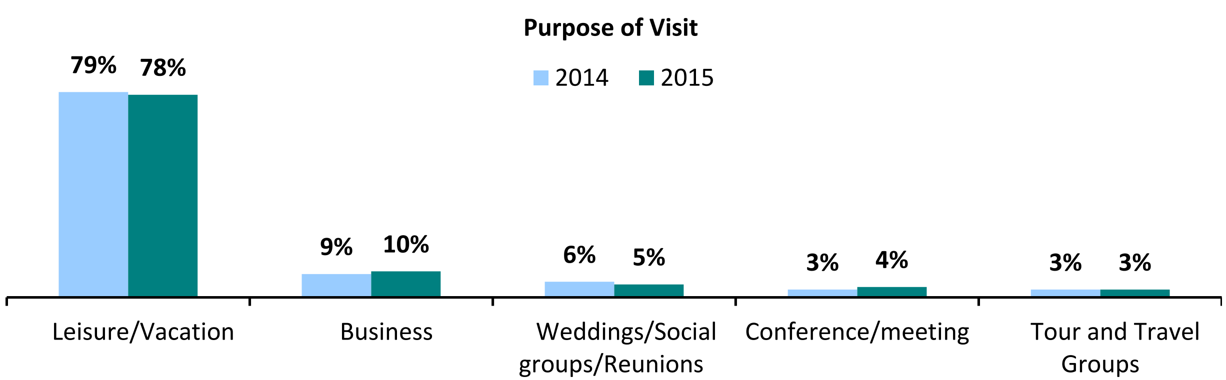




Lodging Management Estimates

Guest Profile		
Spring Season	2014	2015
	A	B
Total Number of Responses	**97**	**98**
Purpose of Visit		
Leisure/Vacation	79%	78%
Business	9%	10%
Weddings/Social groups/Reunions (net)	6%	5%
Conference/meeting	3%	4%
Tour and Travel Groups	3%	3%

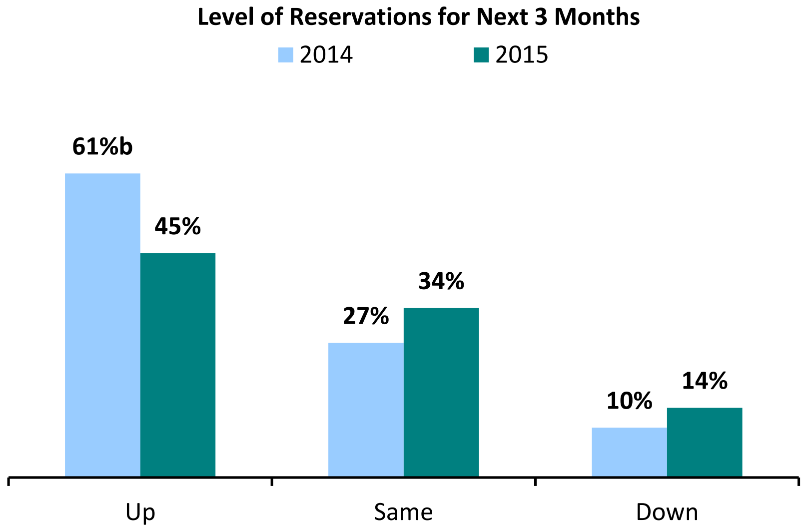
Q22: What percent of your [April/May/June] room/site/unit occupancy do you estimate was generated by:



Occupancy Barometer

Level of Reservations for Next 3 Months Compared to Last Year		
Spring Season	2014	2015
	A	B
Total Respondents	**101**	**106**
Up/Same (net)	88%	79%
Up	61%b	45%
Same	27%	34%
Down	10%	14%

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]?

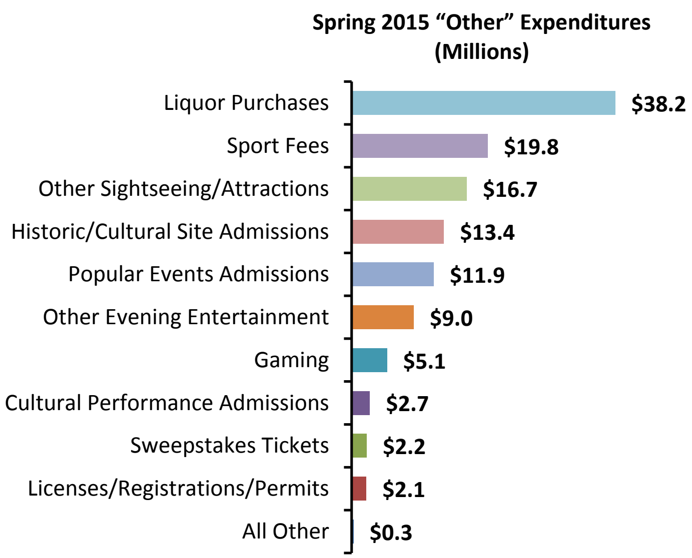


Economic Impact Analysis
Spring 2015

Total Visitor Expenditures by Spending Category

TOTAL EXPENDITURES			
Spring Season	2014	2015	% Change
TOTAL	$684,276,923	$705,436,023	3.1%
Food and Beverages	$176,773,367	$181,079,345	2.4%
Shopping	$175,202,788	$174,206,153	-0.6%
Lodging Accommodations	$152,462,491	$165,032,182	8.2%
Ground Transportation	$62,513,925	$63,643,535	1.8%
Other	$117,324,352	$121,474,808	3.5%

(Note: Other includes the categories detailed below.)



(Note: The sum of the numbers in the chart may not match the "other" row in the table above due to rounding.)

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Total Visitor Expenditures by Lodging Type

TOTAL EXPENDITURES						
	Staying Paid Accommodations			Visiting Friends and Relatives/Day Trippers		
Spring Season	**2014**	**2015**	**% Change**	**2014**	**2015**	**% Change**
TOTAL	$439,766,340	$472,583,652	7.5%	$244,510,583	$232,852,371	-4.8%
Lodging Accommodations	$152,462,491	$165,032,182	8.2%	$0	$0	-
Food and Beverages	$98,317,320	$105,140,451	6.9%	$78,456,047	$75,938,894	-3.2%
Shopping	$90,344,489	$95,321,281	5.5%	$84,858,299	$78,884,872	-7.0%
Ground Transportation	$35,170,068	$37,905,623	7.8%	$27,343,857	$25,737,912	-5.9%
Other	$63,471,972	$69,184,115	9.0%	$53,852,380	$52,290,693	-2.9%

"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

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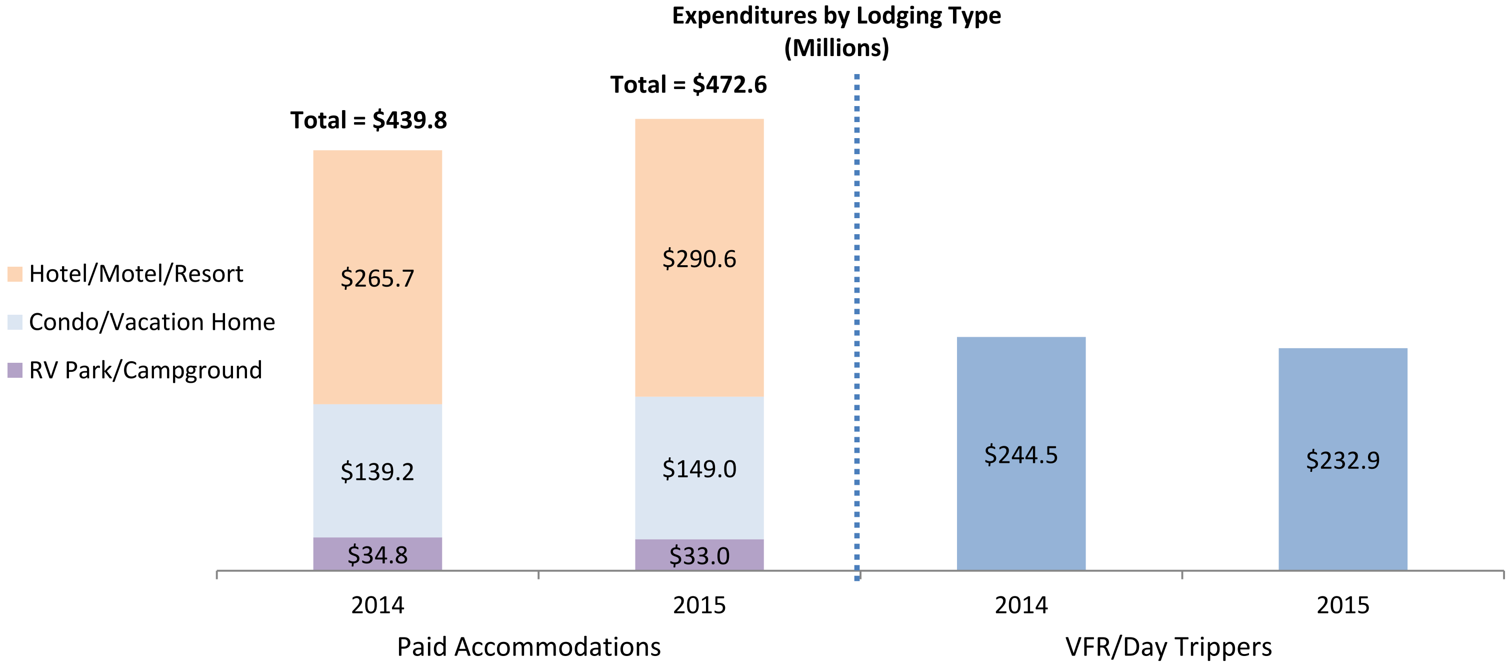
THE BEACHES OF FORT MYERS AND SANIBEL

Total Visitor Expenditures by Lodging Type

Total Expenditures by Lodging Type					
Spring Season	**2014**	**2015**	**% Change**	**2014**	**2015**
TOTAL	$684,276,923	$705,436,023	3.1%	99%	100%
Visiting Friends & Relatives/Day Trippers	$244,510,583	$232,852,371	-4.8%	35%	33%
Paid Accommodations	$439,766,340	$472,583,652	7.5%	64%	67%
Hotel/Motel/Resort/B&B	*$265,692,010*	*$290,582,343*	9.4%	39%	41%
Condo/Cottage/Vacation Home	*$139,225,870*	*$149,035,835*	7.0%	20%	21%
RV Park/Campground	*$34,848,460*	*$32,965,474*	-5.4%	5%	5%



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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 <u>direct</u> and <u>total</u> impacts are mentioned.

<u>DIRECT IMPACTS</u>

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.

<u>TOTAL IMPACTS</u>

Total impacts are the sum of <u>direct</u> and <u>indirect</u> impacts.

<u>Indirect</u> 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.

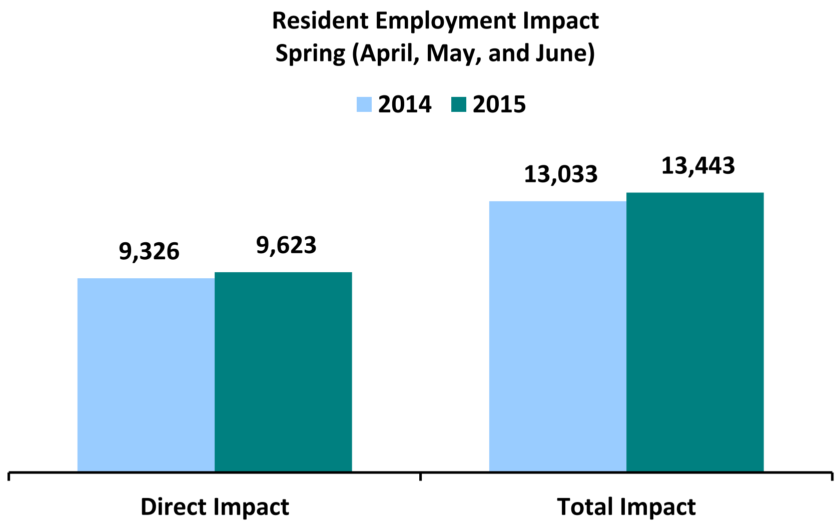
Impact on Jobs for Lee County Residents

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.).



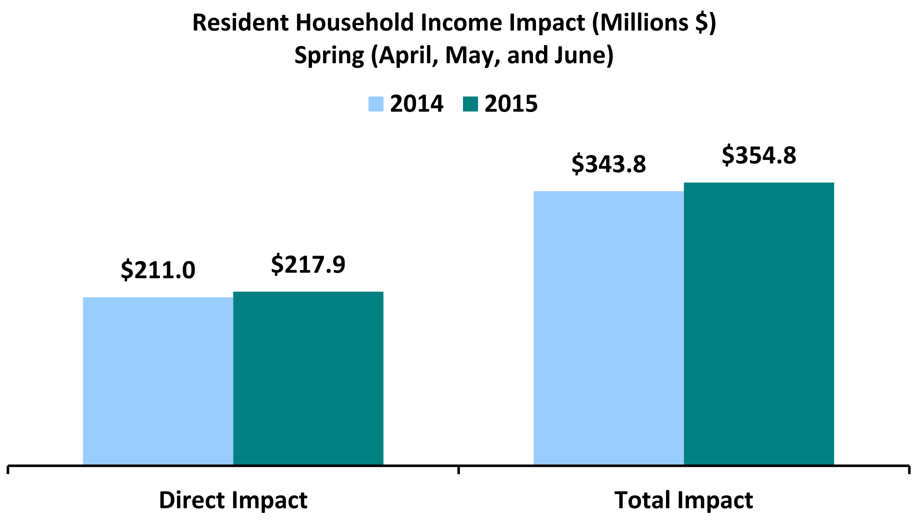
Impact on Household Income for Lee County Residents

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.

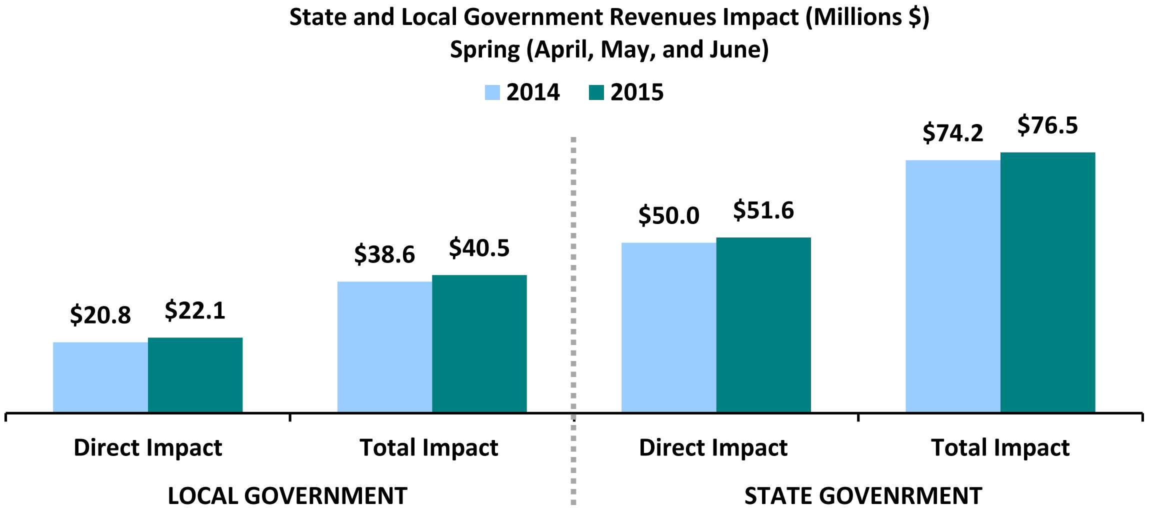
The gross government revenues accruing to governments as A result of producing the output purchased with visitor expenditures is the government revenue impact.

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).



THE BEACHES OF FORT MYERS AND SANIBEL

Appendix

Spring 2015

April 2015 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Fort Myers Beach	Times Square	4/3/2015	19
Fort Myers Beach	Best Western	4/3/2015	12
Fort Myers Beach	Winwood Passage	4/3/2015	11
Cape Coral	Cape Coral Yacht Club	4/4/2015	8
Fort Myers	Edison & Ford Estates	4/7/2015	30
Fort Myers	RSW Airport	4/11/2015	35
Bonita Springs	Bonita Beach	4/13/2015	23
Sanibel	LoggerHead Cay	4/16/2015	10
Sanibel	Sanibel Surfside	4/16/2015	11
Sanibel	Holiday Inn	4/16/2015	12
Fort Myers	Centennial Park	4/18/2015	8
Fort Myers Beach	The Pier	4/22/2015	18
Fort Myers Beach	Diamond Head Resort	4/22/2015	11
Fort Myers	Edison Estates	4/23/2015	25
Fort Myers	RSW Airport	4/26/2015	31
Sanibel	Tarpon Beach Resort	4/28/2015	10
Sanibel	Lighthouse Beach	4/28/2015	12
Sanibel	Sundial Resort	4/28/2015	14
Estero	Miromar Outlets	4/30/2015	16
Total			**316**

May 2015 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Fort Myers	RSW Airport	5/2/2015	31
Fort Myers	Edison & Ford Estates	5/5/2015	26
Sanibel	Pelican Roost	5/7/2015	10
Sanibel	Sanibel Surfside	5/7/2015	10
Sanibel	Holiday Inn	5/7/2015	12
Cape Coral	Cape Coral Yacht Club	5/9/2015	6
Fort Myers Beach	Diamond Head Resort	5/12/2015	10
Fort Myers Beach	Winwood Passage	5/12/2015	10
Fort Myers Beach	Estero Beach Club	5/12/2015	10
Bonita Springs	Bonita Beach	5/15/2015	20
Sanibel	Lighthouse Beach	5/22/2015	8
Sanibel	Sundial Resort	5/22/2015	12
Sanibel	Pelican Roost	5/22/2015	8
Sanibel	Sanibel Siesta	5/22/2015	8
Fort Myers	Centennial Park	5/24/2015	8
Fort Myers Beach	Times Square	5/26/2015	27
Fort Myers Beach	Best Western	5/26/2015	12
Fort Myers	Edison & Ford Estates	5/28/2015	28
Bonita Springs	Bonita Beach	5/29/2015	20
Fort Myers	RSW Airport	5/30/2015	33
Total			**309**

June 2015 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Fort Myers Beach	Diamond Head Resort	6/3/2015	10
Fort Myers Beach	Neptune Inn	6/3/2015	9
Fort Myers Beach	Estero Beach Club	6/3/2015	11
Fort Myers	RSW Airport	6/6/2015	32
Fort Myers	Edison & Ford Estates	6/9/2015	29
Sanibel	Holiday Inn	6/11/2015	12
Sanibel	Tortuga Beach Club	6/11/2015	9
Sanibel	Loggerhead Cay	6/11/2015	9
Fort Myers	Centennial Park	6/20/2015	9
Cape Coral	Cape Coral Yacht Club	6/21/2015	10
Fort Myers Beach	Times Square	6/22/2015	20
Fort Myers Beach	Winwood Passage	6/22/2015	10
Fort Myers Beach	Best Western	6/22/2015	10
Sanibel	Sanibel Siesta	6/24/2015	9
Sanibel	Sanibel Inn	6/24/2015	7
Sanibel	Lighthouse Beach	6/24/2015	10
Sanibel	Sanibel Surfside	6/24/2015	9
Fort Myers	Edison & Ford Estates	6/25/2015	27
Fort Myers	RSW Airport	6/27/2015	30
Bonita Springs	Bonita Beach	6/30/2015	35
Total			**307**

Occupancy Interviewing Statistics

Interviews were conducted during the first two weeks of July 2015 to gather data for April, May, and June 2015 lodging activity. Information was provided by 114 Lee County lodging properties.

Lodging Type	Spring 2015 Number of Interviews
Hotel/Motel/Resort/B&Bs	65
Condo/Cottage/Vacation Home/Timeshare	32
RV Park/Campground	17
Total	**114**