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

Winter 2013 Visitor Profile and Occupancy Analysis

May 10, 2013

Prepared for:

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

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THE BEACHES OF FORT MYERS AND SANIBEL

Executive Summary
Winter 2013

Throughout this report, statistically significant differences between responses for 2012 and 2013 at the 95% confidence level are noted with an A,B lettering system.

For example:

2012 A	2013 B
60%	70%A

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

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Executive Summary

Visitation Estimates

- During the winter season of 2013, Lee County hosted approximately 732,000 visitors staying in paid accommodations and 666,000 staying with friends or relatives while visiting, for an estimated total of 1.4 million visitors.
- Winter 2013 visitation among paid accommodations guests was up 9.4% from 2012, and visitation among those staying with friends or relatives was down 9.5% year-over-year. As a result, Lee County saw no change in total visitation versus winter 2012.

Estimated Visitation	Winter 2012	Winter 2013	% Change
Paid Accommodations	669,555	732,267	9.4%
Friends/Relatives	735,788	666,051	-9.5%
Total Visitation	**1,405,343**	**1,398,318**	**-0.5%**

Visitor Expenditures

- Winter 2013 visitors spent an estimated $1.05 billion during their stay in Lee County, equivalent to that estimated for winter 2012 ($1.05 billion).
- Expenditures among winter 2013 paid accommodations guests amounted to $737.0 million (70% of the total). Although the number of paid accommodations guests increased, their shorter length of stay this year curbed spending. Visitors staying with friends or relatives contributed the remaining $313.1 million – a very slight decline versus a year ago driven by the decrease in number of visitors.

Estimated Expenditures	Winter 2012	Winter 2013	% Change
Paid Accommodations	$733,293,005	$736,972,483	0.5%
Friends/Relatives	$316,700,238	$313,075,730	-1.1%
Total Expenditures	**$1,049,993,243**	**$1,050,048,213**	**0.0%**

THE BEACHES OF FORT MYERS AND SANIBEL

Visitor Origin

- More than three-quarters of winter 2013 visitors staying in paid accommodations were U.S. residents (79%). The majority of international visitors staying in paid accommodations came from Canada (9%) and Germany (5%).

- Six in ten domestic paid accommodations guests came from the Midwest (57%). Almost one-quarter came from the Northeast (23%) and fewer from the South (12%). A small minority of guests came from the West (2%).

- Chicago was the top domestic feeder market for the Lee County lodging industry during winter 2013, followed closely by Indianapolis, Minneapolis, Detroit in the Midwest and Boston in the Northeast.

Winter 2013 Top DMAs (Paid Accommodations)

Chicago	7%	38,657
Indianapolis	6%	35,343
Minneapolis-Saint Paul	6%	34,239
Boston	6%	33,134
Detroit	6%	33,134
New York	5%	28,716
Columbus, OH	3%	16,567
Cincinnati	2%	13,254
Cleveland-Akron	2%	13,254
Hartford-New Haven	2%	13,254
Philadelphia	2%	13,254

Visitors Staying in Paid Accommodations

	%		Visitor Estimates		% Change
Winter Season	**2012**	**2013**	**2012**	**2013**	
Country of Origin					
United States	81%	79%	544,879	582,058	6.8%
Canada	6%	9%	41,559	64,060	54.1%
Germany	6%	5%	40,019	37,552	-6.2%
UK	1%	2%	9,235	16,567	79.4%
Scandinavia	1%	2%	4,618	13,254	187.0%
Austria	<1%	1%	3,078	4,418	43.5%
Switzerland	1%	<1%	6,157	3,313	-46.2%
BeNeLux	1%	<1%	6,157	3,313	-46.2%
Ireland	-	<1%	-	2,209	-
Latin America	<1%	<1%	1,539	1,104	-28.2%
France	1%	-	6,157	-	-
Other/Other Europe	1%	-	6,157	-	-
No Answer	-	1%	-	4,418	-

Visitors Staying in Paid Accommodations

	%		Visitor Estimates		% Change
Winter Season	**2012**	**2013**	**2012**	**2013**	
U.S. Region of Origin					
Florida	1%	2%	7,696	8,836	14.8%
South (including Florida)	11%	12%	61,568	67,373	9.4%
Midwest	57%	57%	310,920	331,343	6.6%
Northeast	23%	23%	124,676	133,641	7.2%
West	5%	2%	24,627	8,836	-64.1%
No Answer	4%	7%	23,088	40,866	77.0%

< > indicates a significant difference between 2012 and 2013 responses at the 95% confidence level.

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

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Trip Planning

- The trip planning horizon reported by winter 2013 visitors was similar in length to that of winter 2012 visitors, with many planning their trip well in advance. Seven in ten started talking about their Lee County trip *three or more months* in advance and nearly as many chose the destination within that timeframe. However, fewer made their lodging reservations within that window.
    - 70% started talking about trip 3+ months in advance (vs. 70% in 2012)
    - 64% chose Lee County for trip (vs. 65% in 2012)
    - 55% made lodging reservation (vs. 55% in 2012)

- The majority of winter 2013 Lee County visitors used the internet as a trip planning tool , with 86% claiming to have visited one or more websites during their planning. Visitors most often mention using airline websites (40%) and search engine websites (34%), followed by hotel and booking websites (27% each).

- Most winter 2013 visitors indicated they typically use their laptop or desktop computer to access destination planning information online (63% and 51% respectively). Although smaller proportions overall, the incidence of using smartphones (40%) and tablets (28%) to access this online content was higher than reported by winter 2012 visitors.

- The most frequently cited attributes that positively influenced winter 2013 visitors' selection of Lee County as their vacation destination were: *warm weather* (94%), *peaceful/relaxing* (86%), and *white sandy beaches* (82%). *A safe destination* (77%) and *clean, unspoiled environment* (73%) also received favorable ratings as being influential.

Visitor Profile

- Two-thirds of winter 2013 visitors flew to the destination – a lower incidence than last year (65% in 2013 vs. 73% in 2012). Southwest Florida International Airport continued to be most commonly used (86%).

- Winter visitors reported they were staying in Lee County 9 or 10 days on average, which was a slightly shorter trip length than last year (9.5 days vs. 10.3 days in winter 2012). More than three-quarters were repeat visitors (79%) who have taken an average of four trips to Lee County in the past five years.

- Among the winter 2013 visitors interviewed, four in ten indicated they were staying in hotel/motel/resort properties (39%). About the same proportion were staying in a condo/vacation home properties (43%) – mostly paid rentals. Half of paid accommodation guests reported that the quality of their lodgings *met expectations* (51%) and another 43% said their accommodations *far exceeded* or *exceeded expectations.*

Visitor Profile (cont'd)

- The top activities visitors enjoyed in Lee County during winter 2013 were: *beaches* (90%), *relaxing* (79%), *dining out* (71%), and to a lesser extent, *shopping* (54%) and *swimming* (47%). Half of visitors took a day trip outside of Lee County (49%), most traveling to Naples.

- Visitors continue to be highly satisfied with their stay in Lee County. The vast majority of winter 2013 visitors said they were either *very satisfied* or *satisfied* with their visit (63% and 32% respectively). For most winter visitors, the positive experience in the destination fosters an intent to return – nine in ten said they are likely to visit Lee County again (89%), and two-thirds of them said they will return next year (65%). Visitors also indicated they will spread the word about their positive experiences in the destination, with 90% suggesting they would recommend Lee County over other areas in Florida.

- When asked what they liked least about the area, nearly half of winter 2013 visitors noted *traffic* (47%) – similar to last year (48%). *Red tide* ranked as a distant second for features disliked (17%) but was a notably higher proportion than last year (7%). Even fewer mentioned other concerns.

- The demographic composition of winter 2013 visitors can be summarized as follows:

    - 56 years of age on average
    - $106,800 household income on average
    - 74% married
    - 51% traveling as a couple
    - 26% traveling as a family
    - 15% traveling *with* 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 1.5% from winter 2012 to 2013 while *occupied* room nights rose 3.3%. The hotel/motel/resort and condo/vacation home categories saw increases in *occupied* room nights (+5.3% and +4.2% respectively), while the RV park/campground category saw a slight decrease (-1.2%).

Winter Season	Occupied Room Nights			Available Room Nights		
	2012	2013	% Change	2012	2013	% Change
Hotel/Motel/Resort/B&B	782,347	823,661	5.3%	1,031,748	1,006,447	-2.5%
Condo/Cottage/Vacation Home	365,469	380,674	4.2%	452,011	452,266	0.1%
RV Park/Campground	415,993	410,834	-1.2%	464,677	461,440	-0.7%
Total	**1,563,809**	**1,615,169**	**3.3%**	**1,948,436**	**1,920,153**	**-1.5%**

- The resulting industry-wide average occupancy rate in Lee County showed an increase from 80.3% in winter 2012 to 84.1% in winter 2013 (+4.8%). Hotels/motels/resorts and condos/vacation homes posted growth in average occupancy rate, while RV parks/campgrounds held steady.
- Lee County's winter season average daily rate also increased year-over-year (+2.8%). This positive shift was driven by the lift in ADR for the hotel/motel/resort category versus last year, despite declines observed for the other two property categories.
- The combined effect of increased average occupancy rate *and* ADR generated a 7.7% boost in RevPAR from winter 2012 to winter 2013. Hotels/motels/resorts experienced significant growth in RevPAR (+13.9%) while RevPAR performance for condos/vacation homes and RV parks/campgrounds was similar to last year.

Winter Season	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2012	2013	% Change	2012	2013	% Change	2012	2013	% Change
Hotel/Motel/Resort/B&B	75.8%	81.8%	8.0%	$164.73	$173.79	5.5%	$124.91	$142.23	13.9%
Condo/Cottage/Vacation Home	80.9%	84.2%	4.0%	$214.40	$207.15	-3.4%	$173.35	$174.36	0.6%
RV Park/Campground	89.5%	89.0%	-0.5%	$56.34	$55.73	-1.1%	$50.44	$49.62	-1.6%
AVERAGE	**80.3%**	**84.1%**	**4.8%**	**$147.51**	**$151.62**	**2.8%**	**$118.39**	**$127.54**	**7.7%**

Lodging Industry Assessments (cont'd)

- According to reports from Lee County property managers, the outlook for spring season lodging reservations – April, May, and June – was largely positive. Three-quarters of property managers responding in early April 2013 noted that their total level of reservations for April, May, and June was higher than (43%) or the same as (35%) the same period last year. Few claimed that their reservations are down for the next three months (21%). In contrast, nearly 90% of property managers responding in April 2012 said their reservations for April-June 2012 were higher than (52%) or the same as (36%) the prior year.

Winter 2013 Lee County Snapshot

Total Visitation

Winter Season	% 2012	% 2013	Visitor Estimates 2012	Visitor Estimates 2013
Paid Accommodations	48%	52%	669,555	732,267
Friends/Relatives	52%	47%	735,788	666,051
Total Visitation			**1,405,343**	**1,398,318**

Total Visitor Expenditures

Winter Season	2012	2013	% Change
Total Visitor Expenditures	$1,049,993,243	$1,050,048,213	0.0%
Paid Accommodations	$733,293,005	$736,972,483	0.5%

Visitor Origin - Visitors Staying in Paid Accommodations

Winter Season	% 2012	% 2013	Visitor Estimates 2012	Visitor Estimates 2013
Florida	1%	2%	7,696	8,836
United States	81%	79%	544,879	582,058
Canada	6%	9%	41,559	64,060
Germany	6%	5%	40,019	37,552
UK	1%	2%	9,235	16,567
Other International	5%	4%	33,863	27,611
No Answer	-	1%	-	4,418

Average Per Person Per Day Expenditures

2012	2013	% Change
$118.64	$124.93	5.3%

First-Time/Repeat Visitors to Lee County

Winter Season	2012	2013
First-time	23%	20%
Repeat	76%	79%

Winter Season	Average Occupancy Rate 2012	Average Occupancy Rate 2013	Average Occupancy Rate % Change	Average Daily Rate 2012	Average Daily Rate 2013	Average Daily Rate % Change	RevPAR 2012	RevPAR 2013	RevPAR % Change
Hotel/Motel/Resort/B&B	75.8%	81.8%	8.0%	$164.73	$173.79	5.5%	$124.91	$142.23	13.9%
Condo/Cottage/Vacation Home	80.9%	84.2%	4.0%	$214.40	$207.15	-3.4%	$173.35	$174.36	0.6%
RV Park/Campground	89.5%	89.0%	-0.5%	$56.34	$55.73	-1.1%	$50.44	$49.62	-1.6%
AVERAGE	**80.3%**	**84.1%**	**4.8%**	**$147.51**	**$151.62**	**2.8%**	**$118.39**	**$127.54**	**7.7%**

Visitor Profile Analysis

Winter 2013

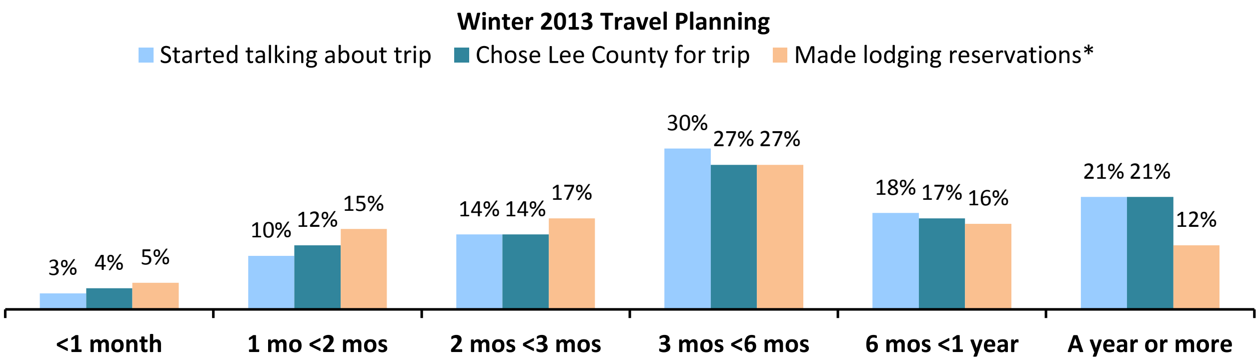
A total of 916 interviews were conducted with visitors in Lee County during the summer months of January, February, and March 2013. A total sample of this size is considered accurate to plus or minus 3.2 percentage points at the 95% confidence level.

A total of 642 interviews were conducted with visitors in Lee County during the summer months of January, February, and March 2012. A total sample of this size is considered accurate to plus or minus 3.9 percentage points at the 95% confidence level.

Travel Planning

	Started Talking About Trip		Chose Lee County for Trip		Made Lodging Reservations	
Winter Season	**2012**	**2013**	**2012**	**2013**	**2012**	**2013**
	A	**B**	**A**	**B**	**A**	**B**
Total Respondents	**642**	**916**	**642**	**916**	**435***	**663***
Less than 3 months (NET)	25%	27%	29%	30%	34%	37%
<1 month	2%	3%	4%	4%	5%	5%
1 month - <2 months	10%	10%	11%	12%	17%	15%
2 months - <3 months	14%	14%	13%	14%	13%	17%
3 months or more (NET)	70%	70%	65%	64%	55%	55%
3 months - <6 months	34%	30%	30%	27%	31%	27%
6 months - <1 year	17%	18%	13%	17%	13%	16%
A year or more	19%	21%	21%	21%	11%	12%
No Lodging Reservations Made	-	-	-	-	5%	6%
No Answer	4%	3%	6%	5%	6%	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? *Note: New question option for “No Lodging Reservations Made” added in 2012.*



* Base: Among those staying in paid accommodations

Travel Planning

Devices Used to Access Destination Planning Information		
	2012	2013
Winter Season	A	B
Total Respondents	**642**	**916**
Any (NET)	94%	93%
Laptop computer	66%	63%
Desktop computer	50%	51%
Smartphone (iPhone, Blackberry, etc.)	33%	40%a
Tablet (iPad, etc.)	19%	28%a
E-Reader (Nook, Kindle, etc.)	3%	7%a
Other portable device	1%	2%
None of these	6%	6%
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		
	2012	2013
Winter Season	A	B
Respondents who used a device to plan	**604**	**854**
Visited web sites (net)	85%	86%
Airline websites	40%	40%
Search Engines	32%	34%
Hotel websites	24%	27%
Booking websites	26%	27%
Trip Advisor	13%	19%a
www.FortMyers-Sanibel.com	18%	16%
AAA	7%	10%a
Visit Florida	10%	8%
Facebook	3%	4%
Other	13%	16%
None/Didn't visit websites	14%	12%
No Answer	1%	1%

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

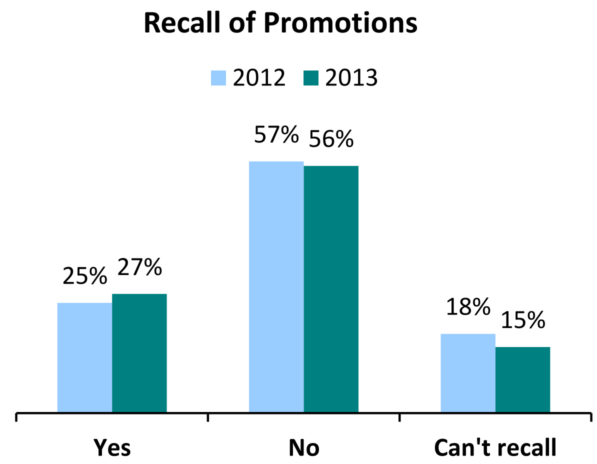
Travel Planning

Travel Information Requested	2012	2013
Winter Season	A	B
Total Respondents	**642**	**916**
Requested information (NET)	31%	36%
Hotel website	16%	18%
Call hotel	9%	9%
VCB website	6%	8%
Visitor Guide	5%	5%
E-Newsletter	1%	1%
Call local Chamber of Commerce	1%	1%
Call VCB	1%	1%
Other	7%	10%a
None/Did not request information	64%	61%
No Answer	5%	3%

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

Recall of Lee County Promotions	2012	2013
Winter Season	A	B
Total Respondents	**642**	**916**
Yes	25%	27%
No	57%	56%
Can't Recall	18%	15%

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

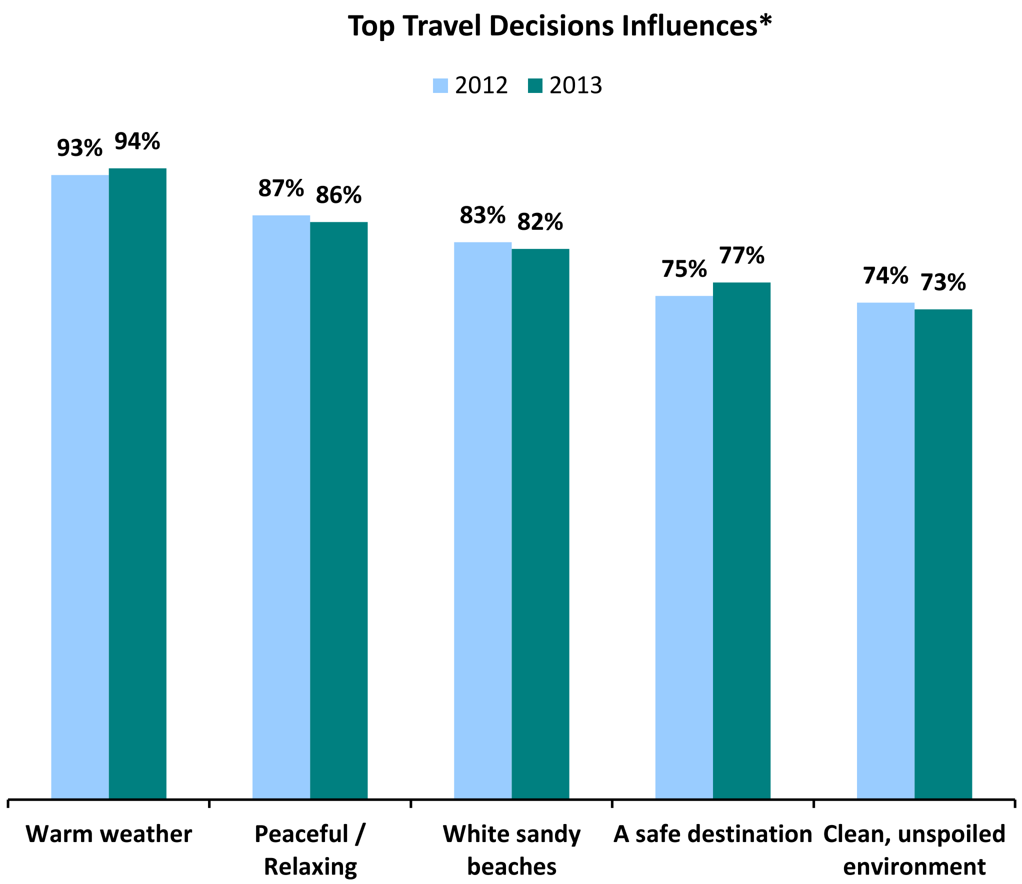


Travel Planning

Travel Decision Influences*		
Winter Season	2012	2013
	A	B
Total Respondents	642	916
Warm weather	93%	94%
Peaceful / Relaxing	87%	86%
White sandy beaches	83%	82%
A safe destination	75%	77%
Clean, unspoiled environment	74%	73%
Convenient location	69%	67%
Plenty to see and do	60%	64%
Good value for the money	63%	63%
Reasonably priced lodging	58%	61%
Affordable dining	54%	56%
A "family" atmosphere	58%	56%
Upscale accommodations	58%	53%

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		
Winter Season	2012	2013
	A	B
Total Respondents	**642**	**916**
Fly	73%b	65%
Drive a personal vehicle	24%	30%a
Drive a rental vehicle	2%	3%
Drive an RV	1%	1%
Other/No Answer	<1%	1%

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

Airport Used		
Winter Season	2012	2013
	A	B
Respondents who flew	**466**	**592**
SW Florida Int'l (Fort Myers)	84%	86%
Tampa Int'l	3%	5%
Orlando Int'l	3%	3%
Miami Int'l	3%	2%
Ft. Lauderdale Int'l	3%	1%
Sarasota / Bradenton	<1%	1%
West Palm Beach Int'l	-	<1%
Other/No Answer	3%b	1%

Q2: At which Florida airport did you land?

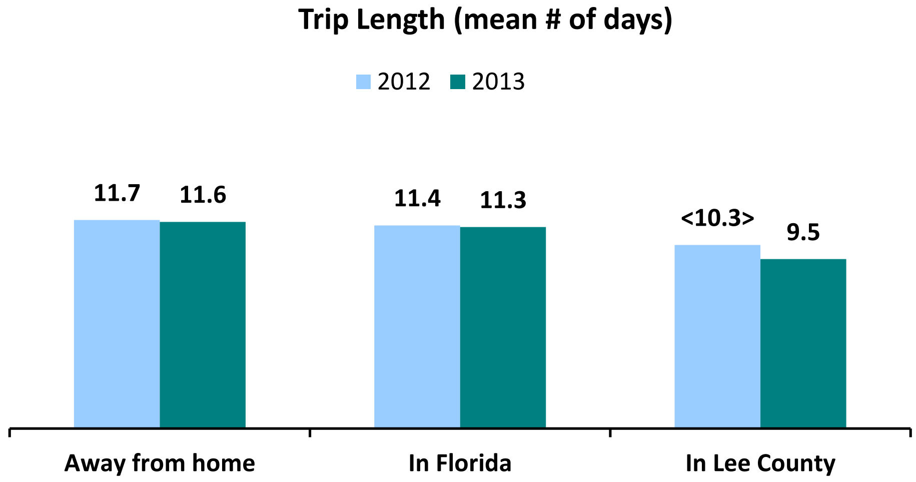
Frequency of Using SWFL Int'l (Past Year)		
Winter Season	2012	2013
Total Respondents	**642**	**916**
One or more trips	69%b	57%
1 trip	49%b	40%
2 to 3 trips	16%	13%
4 to 5 trips	3%	2%
6 or more trips	1%	1%
None/No Answer	31%	43%a

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		
	2012	2013
	A	B
Total Respondents	**642**	**916**
Away from home	11.7	11.6
In Florida	11.4	11.3
In Lee County	10.3b	9.5

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

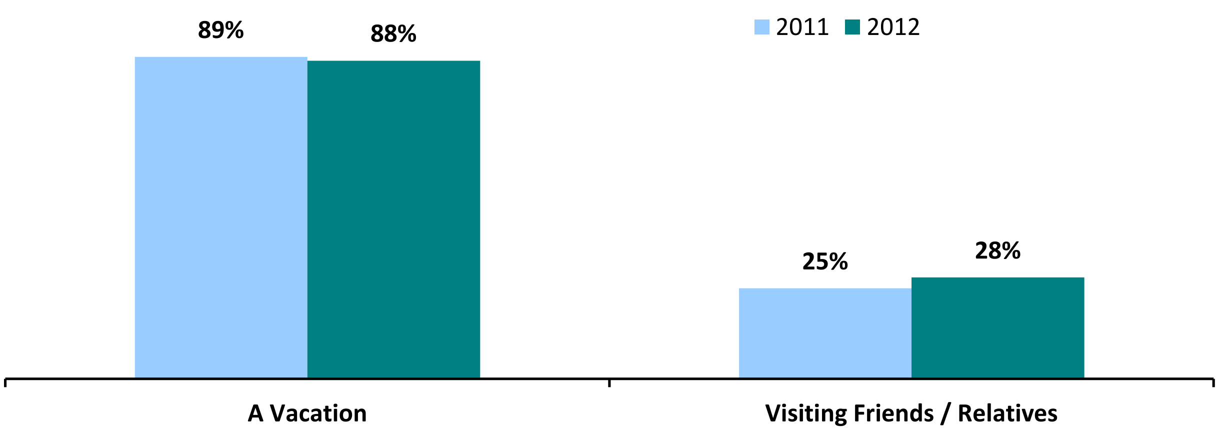


Trip Profile

Reason(s) for Visit		
Winter Season	2012	2013
	A	B
Total Respondents	**642**	**916**
A Vacation	89%	88%
Visiting Friends / Relatives	25%	28%
Sporting Event(s)	5%	5%
Personal Business	2%	2%
Other Business Trip	1%	1%
A Conference / Meeting	1%	1%
A Convention / Trade Show	-	<1%
Other/No Answer (NET)	2%	2%

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

Reason for Visit



Trip Profile

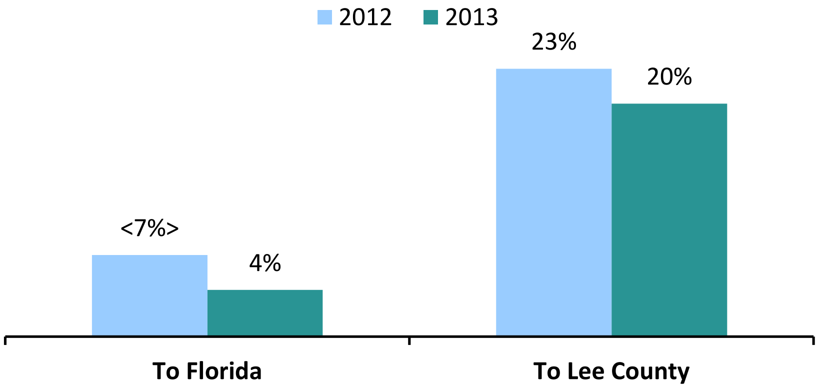
First Time Visitors to Lee County	Total		Florida Residents		Out-of-State Residents		International Visitors	
Winter Season	**2012**	**2013**	**2012**	**2013**	**2012**	**2013**	**2012**	**2013**
	A	**B**	**A**	**B**	**A**	**B**	**A**	**B**
Total Respondents	**642**	**916**	**8****	**16****	**497**	**664**	**113**	**173**
First-time visitor	23%	20%	N/A	N/A	18%	18%	49%b	29%
Repeat visitor	76%	79%	N/A	N/A	81%	81%	51%	70%a
No Answer	1%	1%	N/A	N/A	1%	1%	-	1%

Q15: Is this your first visit to Lee County?
**Note: Small sample size. (N<70) Please interpret results with caution.*
***N/A: Insufficient number of responses for statistical analysis (N<30).*

First Time Visitors to Florida		
Winter Season	**2012**	**2013**
Total Respondents	**642**	**916**
	A	**B**
Yes, first-time visitor	7%b	4%
No	76%	79%
No answer	1%	1%
*FL Residents**	1%	2%

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

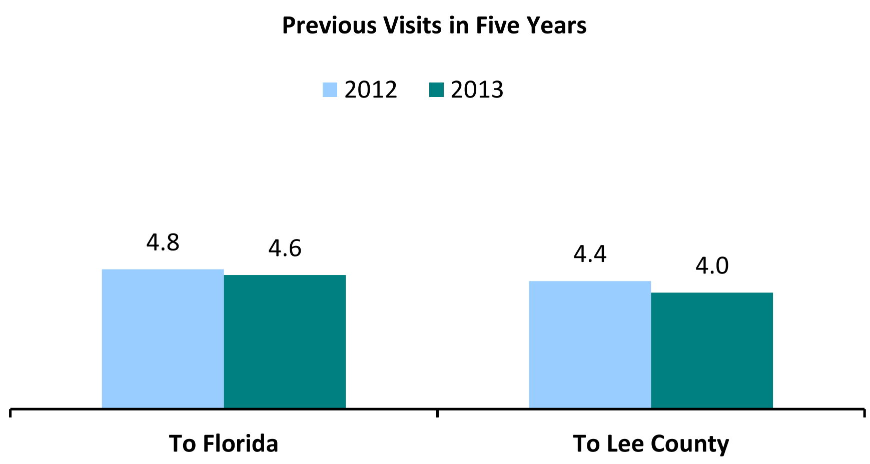
First Time Visitors



Trip Profile

Previous Visits in Five Years				
Winter Season	**Mean # of Visits to Florida**		**Mean # of Visits to Lee County**	
	2012	**2013**	**2012**	**2013**
	A	**B**	**A**	**B**
Base: Repeat Visitors	**579** (FL res. Excl)	**849** (FL res. Excl)	**487**	**722**
Number of visits	4.8	4.6	4.4	4.0

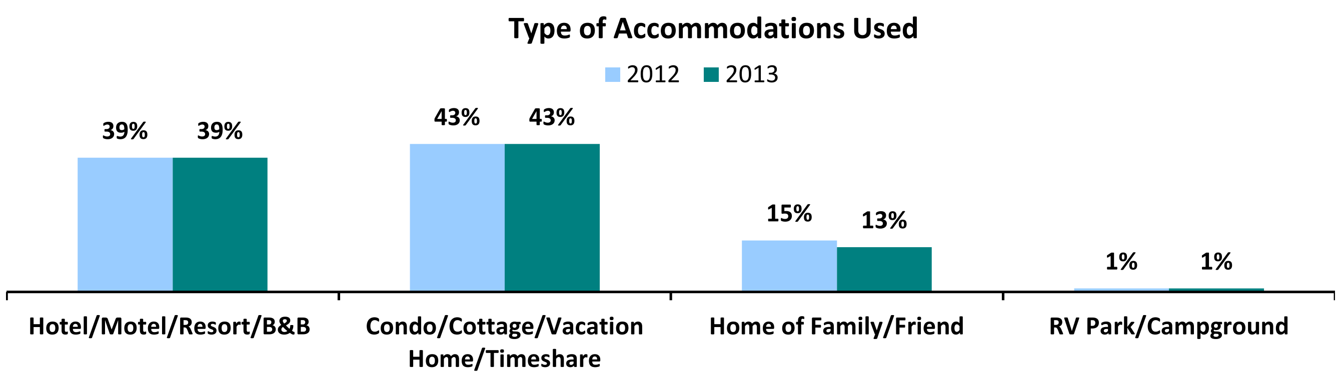
Q14: Over the past five (5) years, how many times have you visited Florida?
Q16: Over the past five (5) years, how many times have you visited Lee County?



Trip Profile

Type of Accommodations Used		
Winter Season	2012	2013
	A	B
Total Respondents	**642**	**916**
Hotel/Motel/Resort/B&B (NET)	**39%**	**39%**
At a hotel/motel/historic inn	22%	23%
At a resort	17%	16%
At a Bed and Breakfast	-	<1%
Condo/Cottage/Vacation Home/Timeshare (NET)	**43%**	**43%**
Rented home/condo	27%	32%
Owned home/condo	10%	8%
Borrowed home/condo	6%	3%
At the home of family or a friend	**15%**	**13%**
RV Park/Campground (NET)	**1%**	**1%**
Daytripper (No Accommodations)	**1%**	**3%**

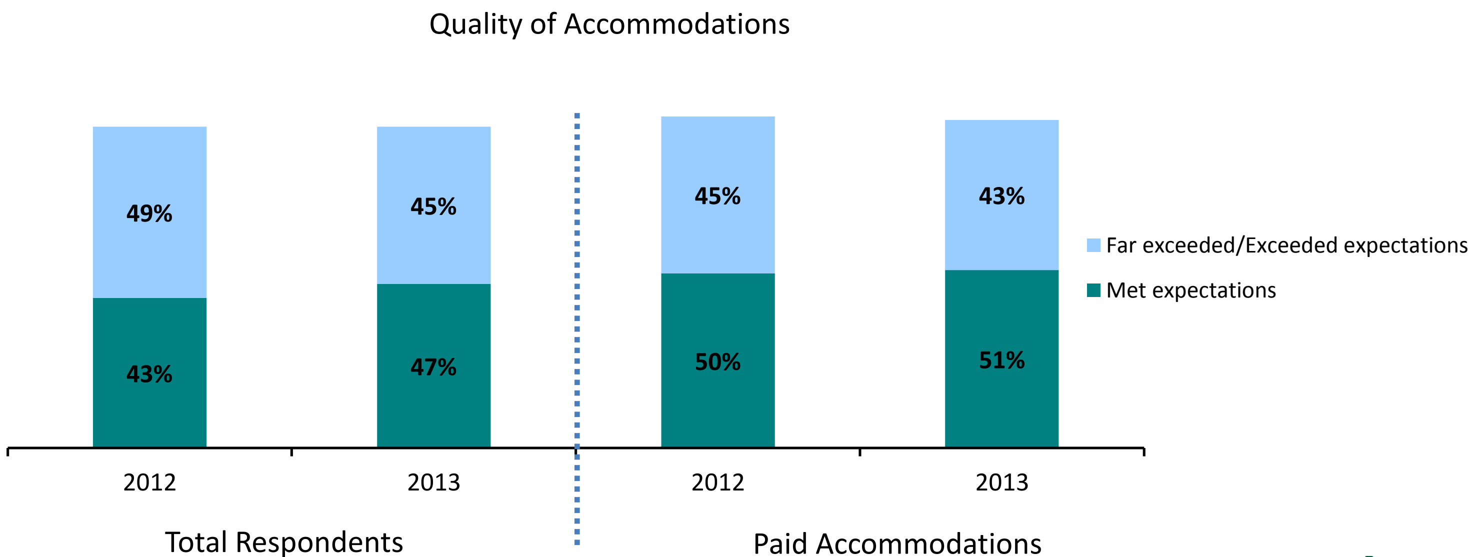
Q20: Are you staying overnight (either last night or tonight):



Trip Profile

Quality of Accommodations				
	Total Respondents		Paid Accommodations	
Winter Season	**2012**	**2013**	**2012**	**2013**
	A	**B**	**A**	**B**
Respondents	**642**	**916**	**435**	**663**
Far exceeded/Exceeded expectations	49%	45%	45%	43%
Met your expectations	43%	47%	50%	51%
Did not meet/Far below expectations	3%	3%	3%	3%
No Answer	5%	5%	2%	2%

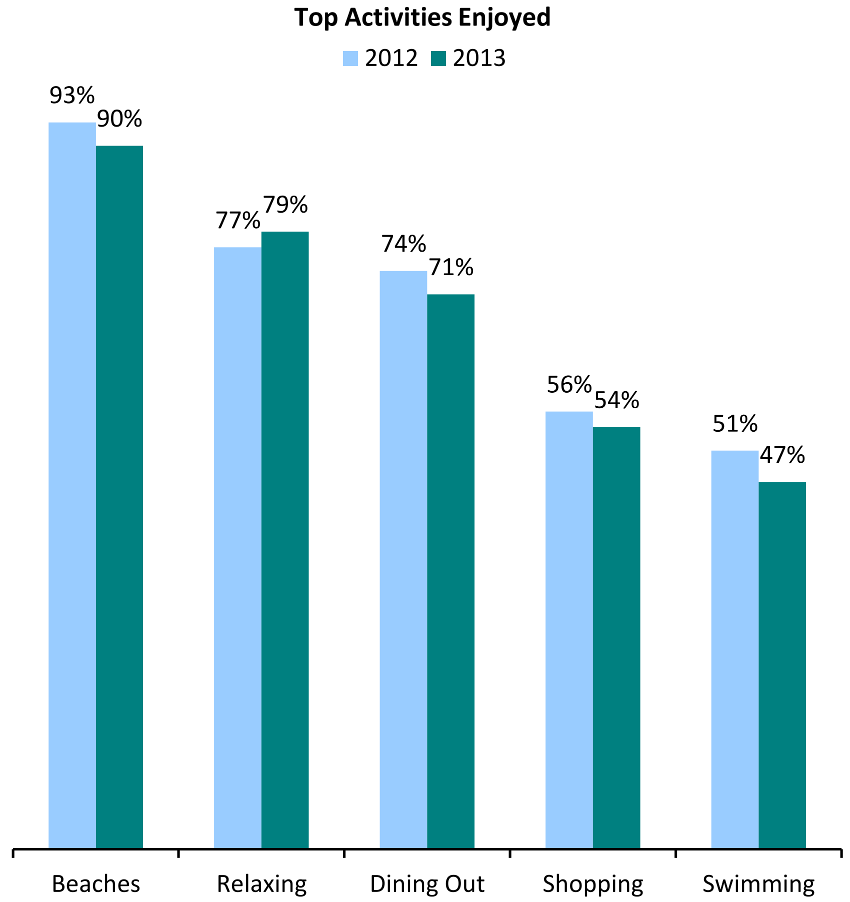
Q21: How would you describe the quality of your accommodations? Do you feel they:



Trip Activities

Activities Enjoyed		
Winter Season	2012	2013
	A	B
Total Respondents	**642**	**916**
Beaches	93%	90%
Relaxing	77%	79%
Dining Out	74%	71%
Shopping	56%	54%
Swimming	51%	47%
Shelling	34%	38%
Sightseeing	35%	38%
Visiting Friends/Relatives	31%	35%
Attractions	24%	30%a
Watching Wildlife	22%	30%a
Photography	20%	22%
Bicycle Riding	22%	21%
Exercise / Working Out	19%	20%
Birdwatching	17%	17%
Bars / Nightlife	16%	16%
Golfing	12%	16%
Fishing	10%	11%
Boating	10%	10%
Sporting Event	9%	9%
Cultural Events	7%	8%
Kayaking / Canoeing	5%	7%
Guided Tour	4%	6%
Miniature Golf	5%	5%
Parasailing / Jet Skiing	3%	4%
Tennis	4%	3%
Scuba Diving / Snorkeling	1%	1%
Other	3%	3%
No Answer	1%	1%

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



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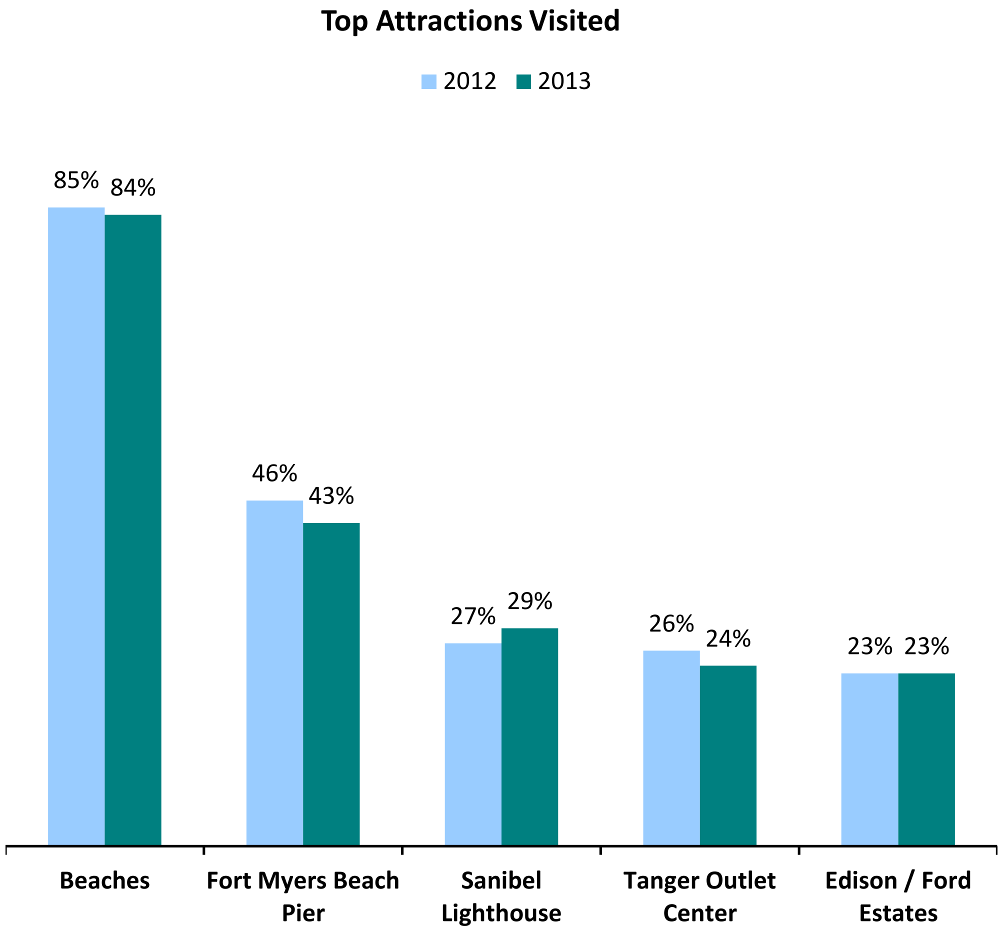
Trip Activities

Attractions Visited		
Winter Season	2012	2013
	A	B
Total Respondents	**642**	**916**
Beaches	85%	84%
Fort Myers Beach Pier	46%	43%
Sanibel Lighthouse	27%	29%
Tanger Outlet Center	26%	24%
Edison / Ford Estates	23%	23%
Ding Darling National Wildlife Refuge	19%	22%
Miromar Outlets Mall	21%	21%
Periwinkle Place	16%	16%
Bell Tower Shops	14%	13%
Coconut Point Mall	14%	12%
Gulf Coast Town Center	7%	10%
Shell Factory and Nature Park	8%	9%
Edison Mall	10%	9%
Manatee Park	5%	7%
Bailey-Matthews Shell Museum	3%	4%
Broadway Palm Dinner Theater	3%	3%
Barbara B. Mann Perfoming Arts Hall	1%	2%
Babcock Wilderness Adventures	1%	1%
Other	6%	9%
None/No Answer (NET)	4%	4%

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



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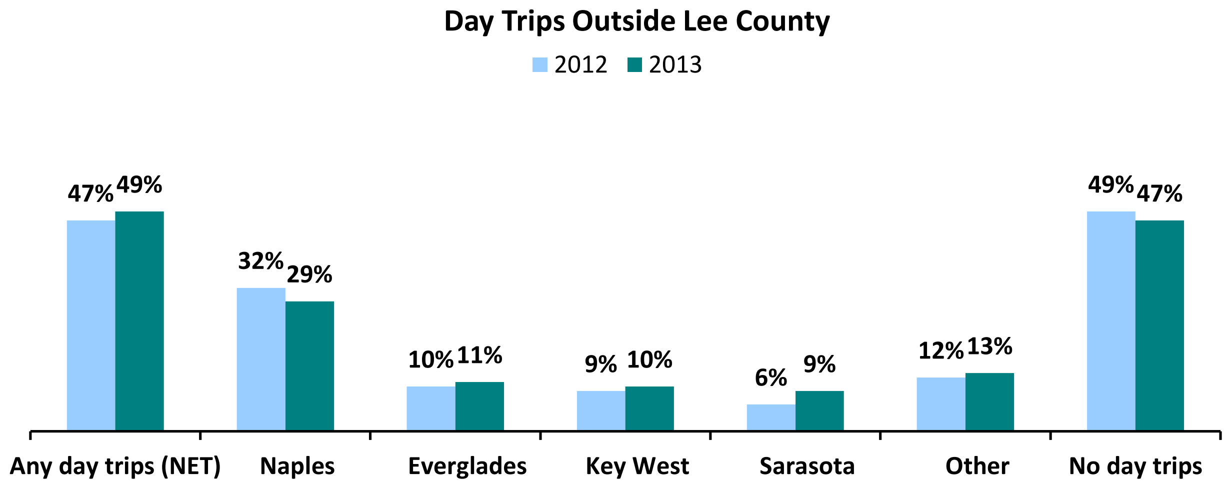
Trip Activities

Day Trips Outside Lee County		
Winter Season	**2012**	**2013**
	A	**B**
Total Respondents	**642**	**916**
Any day trips (NET)	47%	49%
Naples	32%	29%
Everglades	10%	11%
Key West	9%	10%
Sarasota	6%	9%a
Other	12%	13%
No day trips	49%	47%
No Answer	11%	11%

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

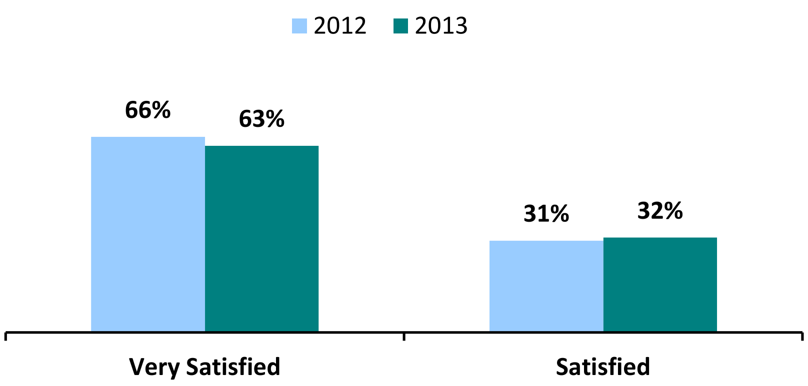


Lee County Experience

Satisfaction with Visit		
Winter Season	2012	2013
	A	B
Total Respondents	**642**	**916**
Very Satisfied/Satisfied	97%b	95%
Very Satisfied	*66%*	*63%*
Satisfied	*31%*	*32%*
Neither	<1%	1%
Dissatisfied/Very Dissatisfied	<1%	<1%
Don’t know/no answer	3%	4%

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

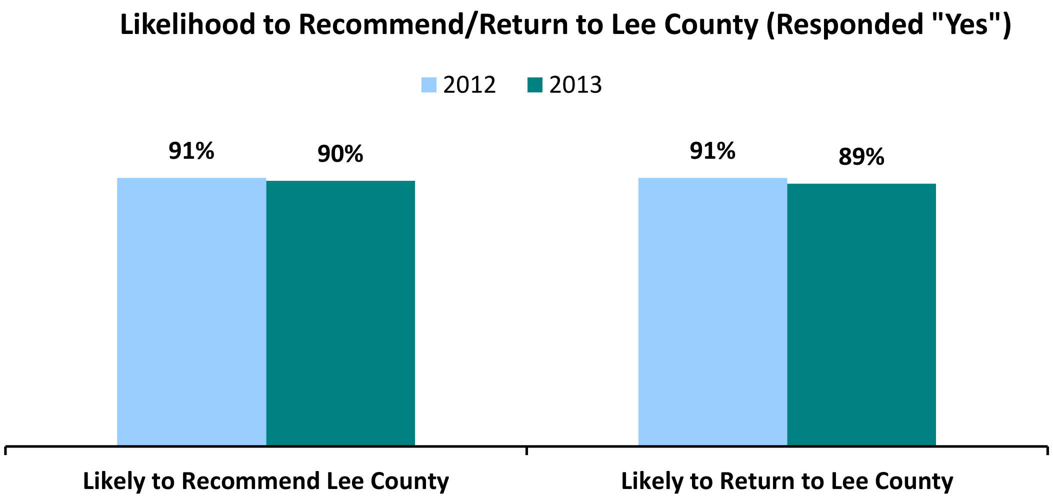
Satisfaction with Visit



Future Plans

Likelihood to Recommend/Return to Lee County		
Winter Season	2012	2013
	A	B
Total Respondents	**642**	**916**
Likely to Recommend Lee County	91%	90%
Likely to Return to Lee County	91%	89%
Base: Total Respondents Planning to Return		
Likely to Return Next Year	62%	65%

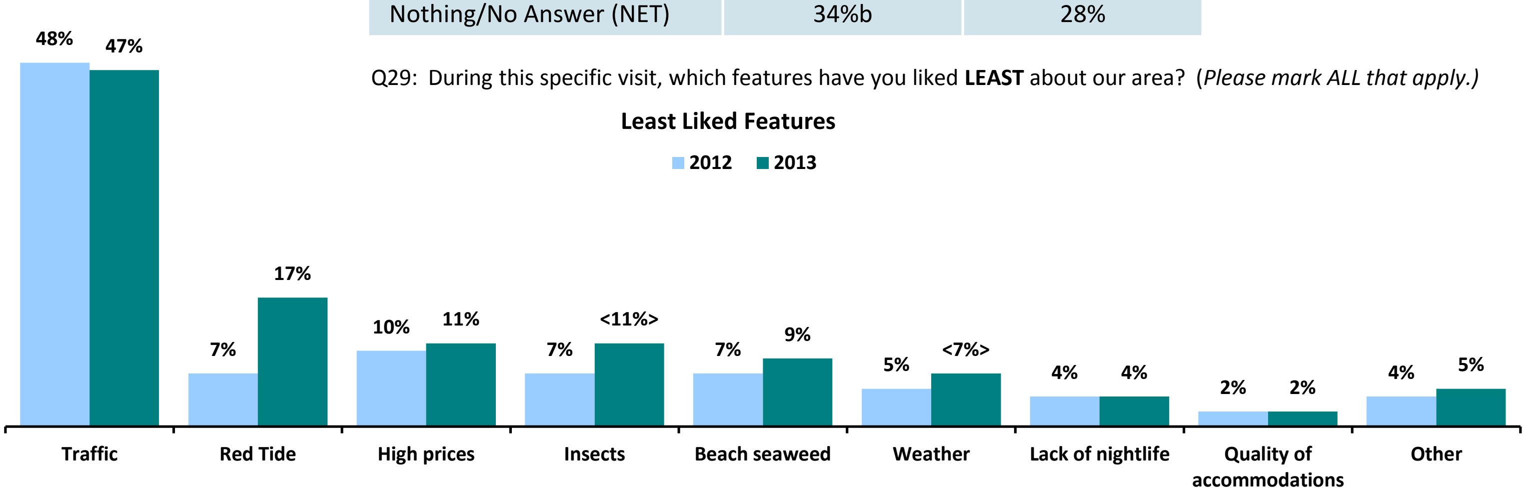
Q27: Would you recommend Lee County to a friend over other vacation areas in Florida?
Q31: Will you come back to Lee County?
Q32: Will you come back next year?



Trip Activities

Least Liked Features		
Winter Season	2012	2013
	A	B
Total Respondents	**642**	**916**
Traffic	48%	47%
Red Tide	7%	17%a
High prices	10%	11%
Insects	7%	11%a
Beach seaweed	7%	9%
Weather	5%	7%a
Lack of nightlife	4%	4%
Quality of accommodations	2%	2%
Other	4%	5%
Nothing/No Answer (NET)	34%b	28%

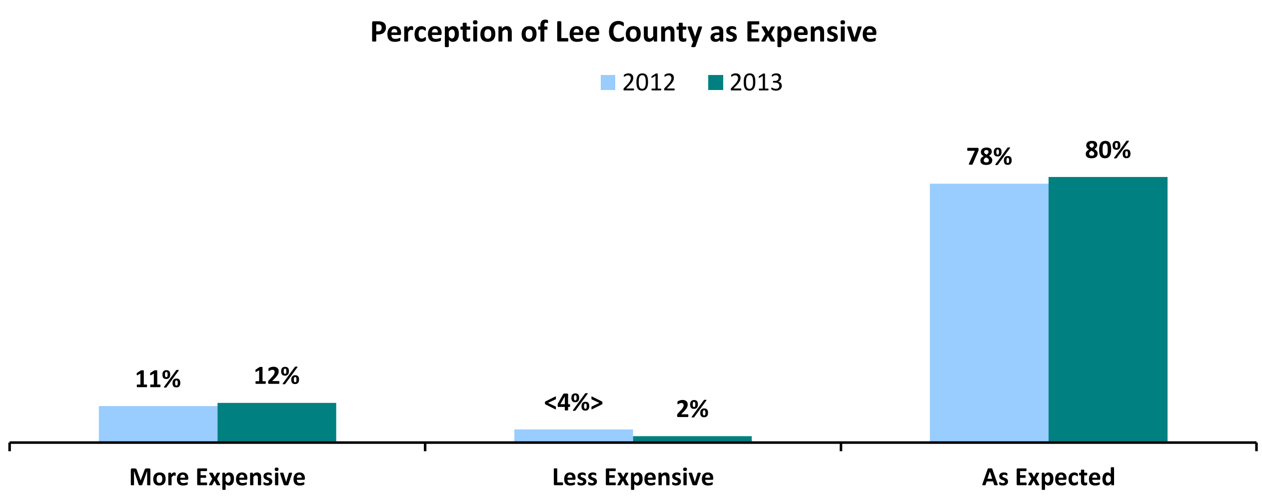
Q29: During this specific visit, which features have you liked **LEAST** about our area? (*Please mark ALL that apply.)*



Trip Activities

Perception of Lee County as Expensive		
Winter Season	**2012**	**2013**
	A	**B**
Total Respondents	**642**	**916**
More Expensive	11%	12%
Less Expensive	4%b	2%
As Expected	78%	80%
Don't know/No Answer (NET)	7%	6%

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



Visitor and Travel Party Demographic Profile

Visitor Demographic Profile

Winter Season	2012	2013
	A	B
Total Respondents	**642**	**916**
Age of respondent (mean)	54.2	55.5
Annual household income (mean)	$106,249	$106,760
Martial Status		
Married	75%	74%
Single	11%	10%
Vacations per year (mean)	2.8	2.7
Short getaways per year (mean)	4.2	4.2

Q37: What is your age, please?
Q39: What is your total annual household income before taxes?
Q36. Are you: Married/Single/Other
Q33: How many vacations, lasting FIVE (5) OR MORE NIGHTS AWAY FROM HOME, do you take in an average year?
Q34: And how many short getaway trips lasting AT LEAST (1) BUT NOT MORE THAN FOUR (4) NIGHTS AWAY FROM HOME, do you take in an average year?

Travel Party

Winter Season	2012	2013
	A	B
Total Respondents	**642**	**916**
Couple	49%	51%
Family	29%	26%
Group of couples/friends	13%	12%
Single	7%	8%
Mean travel party size	2.9b	2.7
Mean adults in travel party	2.5	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

Winter Season	2012	2013
	A	B
Total Respondents	**642**	**916**
Traveling with any Children (net)	19%	15%
Any younger than 6	7%	6%
Any ages 6-11	8%	6%
Any 12-17 years old	10%	6%
No Children	81%	85%

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

Visitor Origin and Visitation Estimates

Total Visitation

	%		Visitor Estimates		
Winter Season	**2012**	**2013**	**2012**	**2013**	**% Change**
Paid Accommodations	47%	48%	669,555	732,267	9.4%
Friends/Relatives	53%	52%	735,788	666,051	-9.5%
Total Visitation			**1,405,343**	**1,398,318**	**-0.5%**

Visitor Origin (Paid Accommodation Guests)

Winter Season	%		Visitor Estimates		
Country of Origin	**2012**	**2013**	**2012**	**2013**	**% Change**
United States	81%	79%	544,879	582,058	6.8%
Canada	6%	9%	41,559	64,060	54.1%
Germany	6%	5%	40,019	37,552	-6.2%
UK	1%	2%	9,235	16,567	79.4%
Scandinavia	1%	2%	4,618	13,254	187.0%
Austria	<1%	1%	3,078	4,418	43.5%
Switzerland	1%	<1%	6,157	3,313	-46.2%
BeNeLux	1%	<1%	6,157	3,313	-46.2%
Ireland	-	<1%	-	2,209	-
Latin America	<1%	<1%	1,539	1,104	-28.2%
France	1%	-	6,157	-	-100.0%
Other/Other Europe	1%	-	6,157	-	-100.0%
No Answer	-	1%	-	4,418	-

U.S. Region of Origin	2012	2013	2012	2013	% Change
Florida	1%	2%	7,696	8,836	14.8%
South (including Florida)	11%	12%	61,568	67,373	9.4%
Midwest	57%	57%	310,920	331,343	6.6%
Northeast	23%	23%	124,676	133,641	7.2%
West	5%	2%	24,627	8,836	-64.1%
No Answer	4%	7%	23,088	40,866	77.0%

< > indicates a significant difference between 2011 and 2012 responses at the 95% confidence level.

Winter 2013 Top DMAs (Paid Accommodations)

Chicago	7%	38,657
Indianapolis	6%	35,343
Minneapolis-Saint Paul	6%	34,239
Boston	6%	33,134
Detroit	6%	33,134
New York	5%	28,716
Columbus, OH	3%	16,567
Cincinnati	2%	13,254
Cleveland-Akron	2%	13,254
Hartford-New Haven	2%	13,254
Philadelphia	2%	13,254

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

Occupancy Data Analysis
Winter 2013

For the 2013 winter season, property managers were interviewed in April 2013 to provide data for each specific month of the season (January, February, and March 2013).

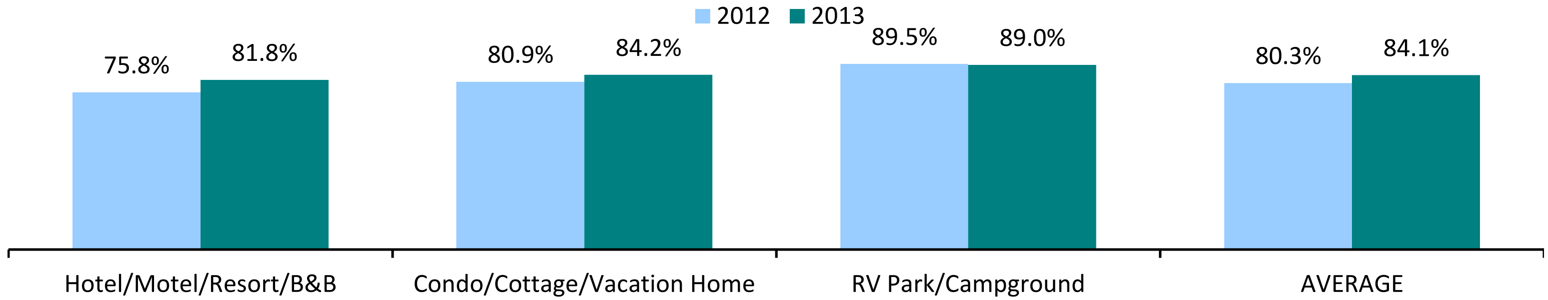
For the 2012 winter season, property managers were interviewed in February 2012, March 2012, and April 2012 to provide data for the preceding month.

Occupancy/Daily Rates

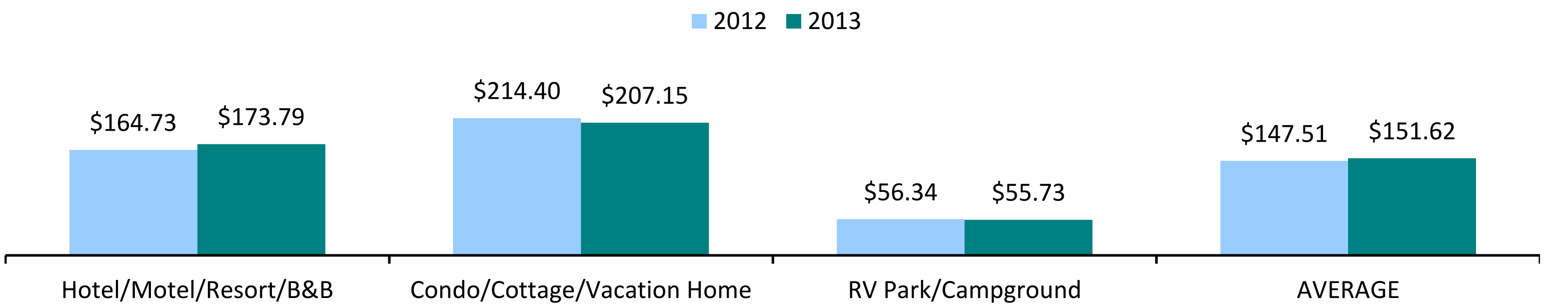
	Average Occupancy Rate			Average Daily Rate			RevPAR		
Winter Season	**2012**	**2013**	**% Change**	**2012**	**2013**	**% Change**	**2012**	**2013**	**% Change**
Hotel/Motel/Resort/B&B	75.8%	81.8%	8.0%	$164.73	$173.79	5.5%	$124.91	$142.23	13.9%
Condo/Cottage/Vacation Home	80.9%	84.2%	4.0%	$214.40	$207.15	-3.4%	$173.35	$174.36	0.6%
RV Park/Campground	89.5%	89.0%	-0.5%	$56.34	$55.73	-1.1%	$50.44	$49.62	-1.6%
AVERAGE	**80.3%**	**84.1%**	**4.8%**	**$147.51**	**$151.62**	**2.8%**	**$118.39**	**$127.54**	**7.7%**

Q16: What was your overall average occupancy rate for the month of [January/February/March]?
Q17: What was your average daily rate (ADR) in [January/February/March]?

Average Occupancy Rate

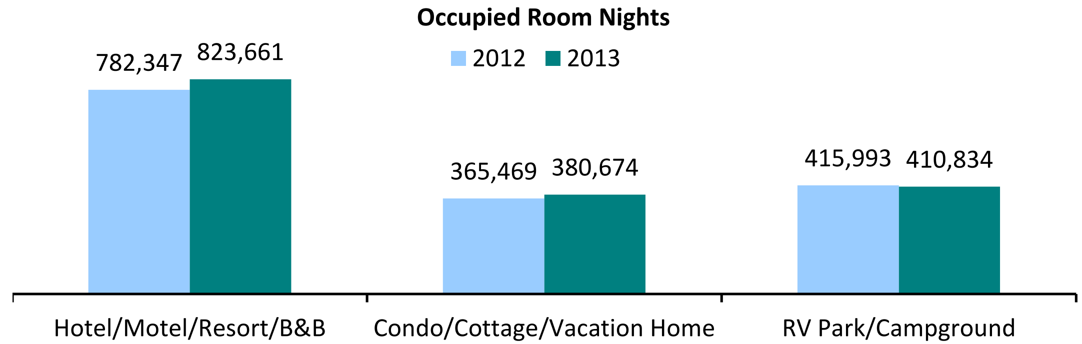


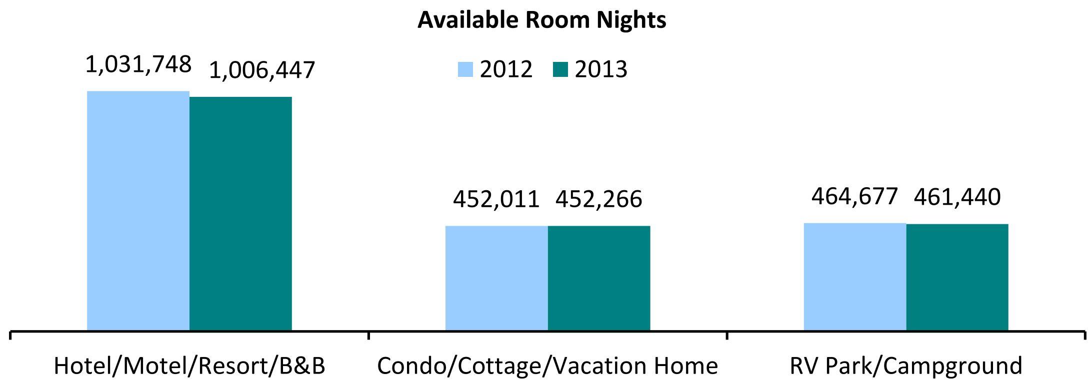
Average Daily Rate



Room/Unit/Site Nights

	Occupied Room Nights			Available Room Nights		
Winter Season	**2012**	**2013**	**% Change**	**2012**	**2013**	**% Change**
Hotel/Motel/Resort/B&B	782,347	823,661	5.3%	1,031,748	1,006,447	-2.5%
Condo/Cottage/Vacation Home	365,469	380,674	4.2%	452,011	452,266	0.1%
RV Park/Campground	415,993	410,834	-1.2%	464,677	461,440	-0.7%
Total	**1,563,809**	**1,615,169**	**3.3%**	**1,948,436**	**1,920,153**	**-1.5%**

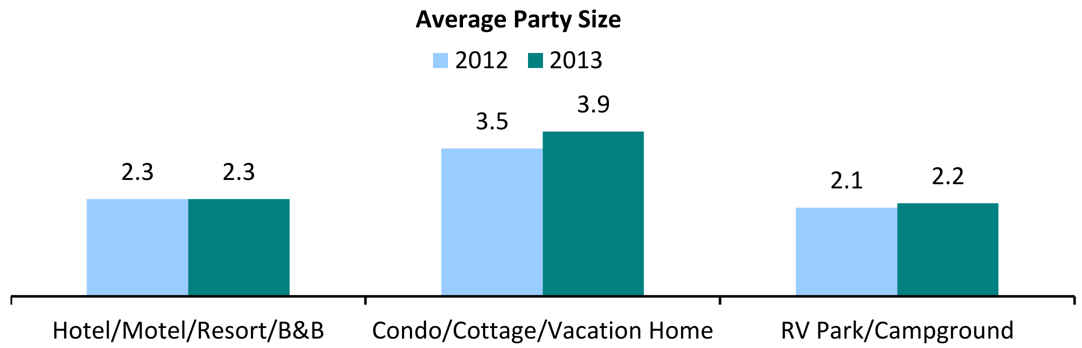


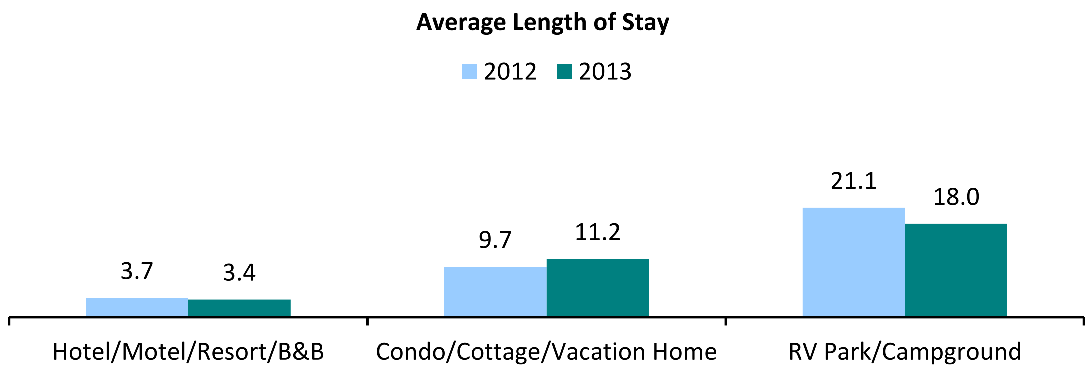


Average Party Size and Length of Stay

	Average Party Size			Average Length of Stay		
Winter Season	**2012**	**2013**	**% Change**	**2012**	**2013**	**% Change**
Hotel/Motel/Resort/B&B	2.3	2.3	0.0%	3.7	3.4	-7.6%
Condo/Cottage/Vacation Home	3.5	3.9	9.6%	9.7	11.2	15.3%
RV Park/Campground	2.1	2.2	1.9%	21.1	18.0	-14.6%
Average	**2.6**	**2.6**	**0.0%**	**6.0**	**5.8**	**-2.8%**

Q18: What was your average number of guests per room/site/unit in [January/February/March]?
Q19: What was the average length of stay (in nights) of your guests in [January/February/March]?

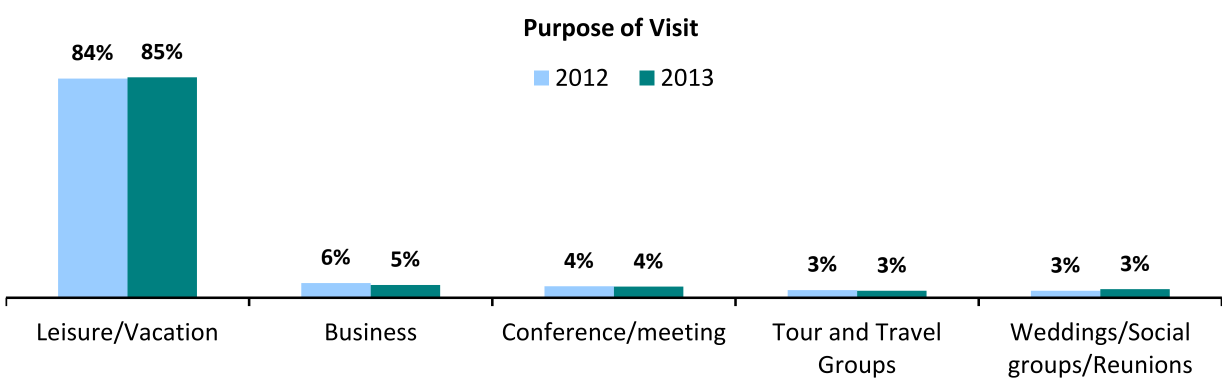




Lodging Management Estimates

Guest Profile		
Winter Season	2012	2013
	A	B
Total Number of Responses	**271**	**95**
Purpose of Visit		
Leisure/Vacation	84%	85%
Business	6%	5%
Conference/meeting	4%	4%
Tour and Travel Groups	3%	3%
Weddings/Social groups/Reunions (net)	3%	3%

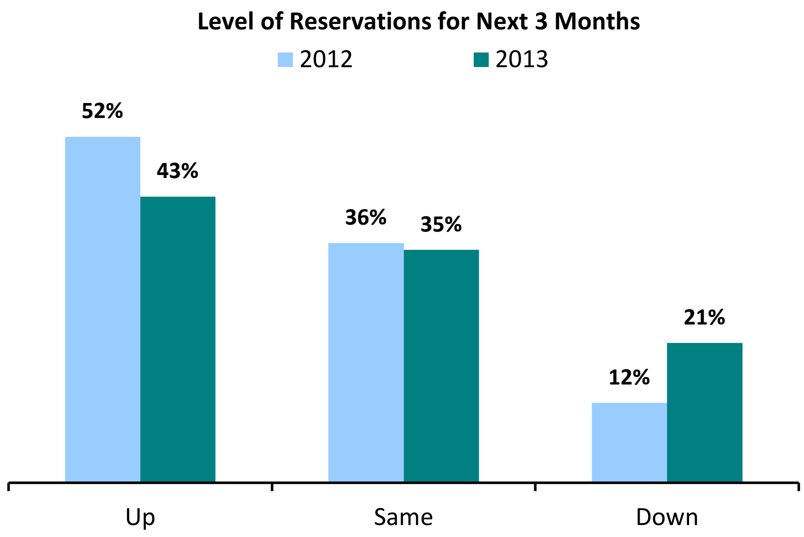
Q22: What percent of your [January/February/March] room/site/unit occupancy do you estimate was generated by:



Occupancy Barometer

Level of Reservations for Next 3 Months Compared to Last Year		
Winter Season	2012	2013
	A	B
Total Respondents	**99***	**101**
Up/Same (net)	88%	77%
Up	52%	43%
Same	36%	35%
Down	12%	21%

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



***Note: Only includes those property managers interviewed in April 2012 for direct comparability to those interviewed in April 2013.**

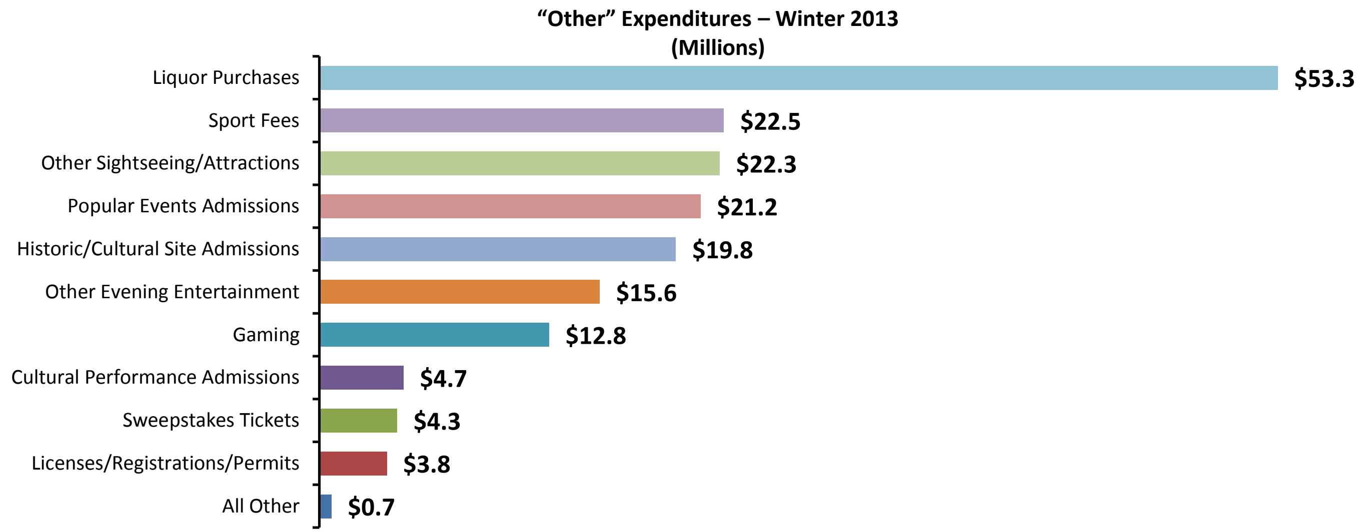
Economic Impact Analysis

Winter 2013

Total Visitor Expenditures by Spending Category

TOTAL EXPENDITURES			
Winter Season	2012	2013	% Change
TOTAL	$1,049,993,243	$1,050,048,213	0.0%
Food and Beverages	$274,076,283	$268,197,542	-2.1%
Shopping	$261,041,509	$261,154,408	0.0%
Lodging Accommodations	$230,671,762	$244,896,197	6.2%
Ground Transportation	$101,228,325	$94,764,414	-6.4%
Other	$182,975,364	$181,035,652	-1.1%

(Note: Other includes the categories detailed below.)



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

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Total Visitor Expenditures by Lodging Type

TOTAL EXPENDITURES						
	Staying Paid Accommodations			Visiting Friends and Relatives/Day Trippers		
Winter Season	2012	2013	% Change	2012	2013	% Change
TOTAL	$733,293,005	$736,972,483	0.5%	$316,700,238	$313,075,730	-1.1%
Lodging Accommodations	$230,671,762	$244,896,197	6.2%	$0	$0	-
Food and Beverages	$165,362,322	$162,282,873	-1.9%	$108,713,961	$105,914,669	-2.6%
Shopping	$156,630,197	$156,231,585	-0.3%	$104,411,312	$104,922,823	0.5%
Ground Transportation	$67,119,459	$62,565,806	-6.8%	$34,108,866	$32,198,608	-5.6%
Other	$113,509,265	$110,996,022	-2.2%	$69,466,099	$70,039,630	0.8%

"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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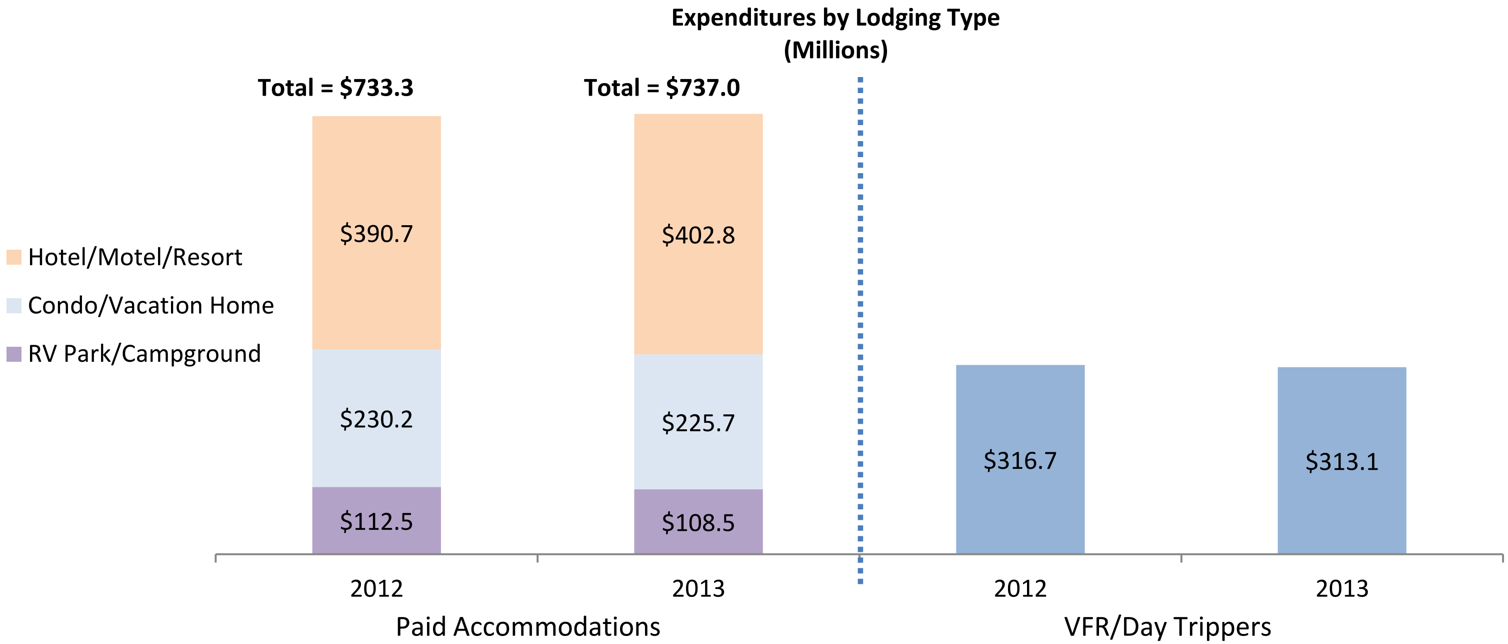
Total Visitor Expenditures by Lodging Type

Total Expenditures by Lodging Type					
Winter Season	2012	2013	% Change	2012	2013
TOTAL	$1,049,993,243	$1,050,048,213	0.0%	100%	100%
Visiting Friends & Relatives/Day Trippers	$316,700,238	$313,075,730	-1.1%	30%	30%
Paid Accommodations	$733,293,005	$736,972,483	0.5%	70%	70%
Hotel/Motel/Resort/B&B	*$390,676,542*	*$402,763,469*	*3.1%*	*37%*	*38%*
Condo/Cottage/Vacation Home	*$230,153,970*	*$225,747,868*	*-1.9%*	*22%*	*21%*
RV Park/Campground	*$112,462,493*	*$108,461,146*	*-3.6%*	*11%*	*10%*



Direct and Indirect Impact of Visitor Expenditures

Estimated total visitor expenditures (detailed in 16 expense categories) are entered into an input/output model designed specifically for Lee County. This model classifies the visitor expenditure dollars by industry and identifies how the dollars move through the County economy. This Regional Input-Output Model is based on an economic model designed by the Federal Government, but it is modified using County Business Patterns to reflect how the economy of Lee County actually works.

In the text and figures which follow to describe the impact of visitor expenditures on Lee County, both direct and total impacts are mentioned.

DIRECT IMPACTS

Economic benefits due directly to visitor expenditures.

For example, when visitor expenditures pay the salary and benefits for a hotel desk clerk, that amount would be considered in the direct impact for both jobs and income.

TOTAL IMPACTS

Total impacts are the sum of direct and indirect impacts.

Indirect impacts are the additional economic benefits supported during additional rounds of spending.

For example, the front desk clerk pays income tax and property tax which are an indirect result of visitor expenditures. The front desk clerk also pays his/her utility bills, buys food for his/her family, shops for gifts, etc. Those dollars create the indirect impact of the initial traveler expenditures through many additional rounds of spending in the economy.

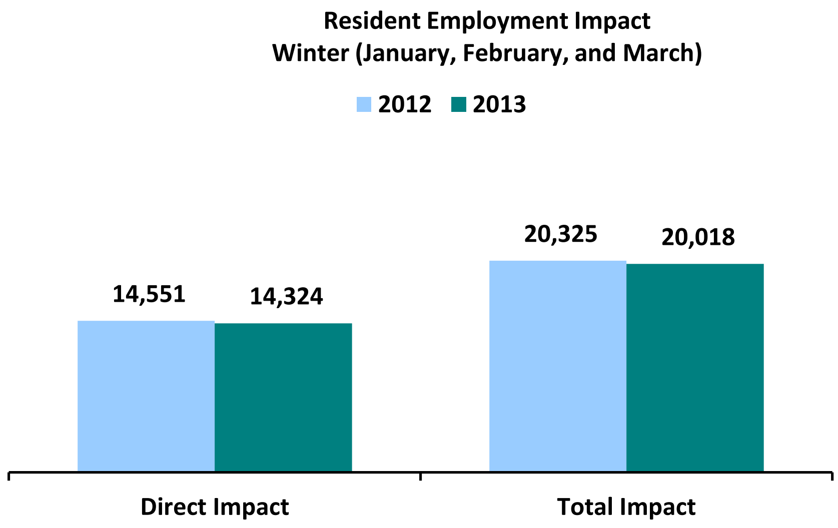
Impact on Jobs for Lee County Residents

In order to produce the output (food, lodging, entertainment, etc.) purchased by visitors, businesses have to employ people.

The number of jobs necessary to produce what is purchased with visitor expenditures is the employment impact of the visitor expenditures.

Direct employment includes the number of employees necessary to produce the direct output purchased with the visitor expenditures.

Total employment includes the number of employees necessary to produce the direct output purchased with the visitor expenditures PLUS the employees necessary to produce additional output purchased with the recirculation of money in Lee County. For example, wages paid to a hotel desk clerk are then used to purchase food and services for that employee, leading to additional supported jobs (grocery store proprietor, auto mechanic, etc.).



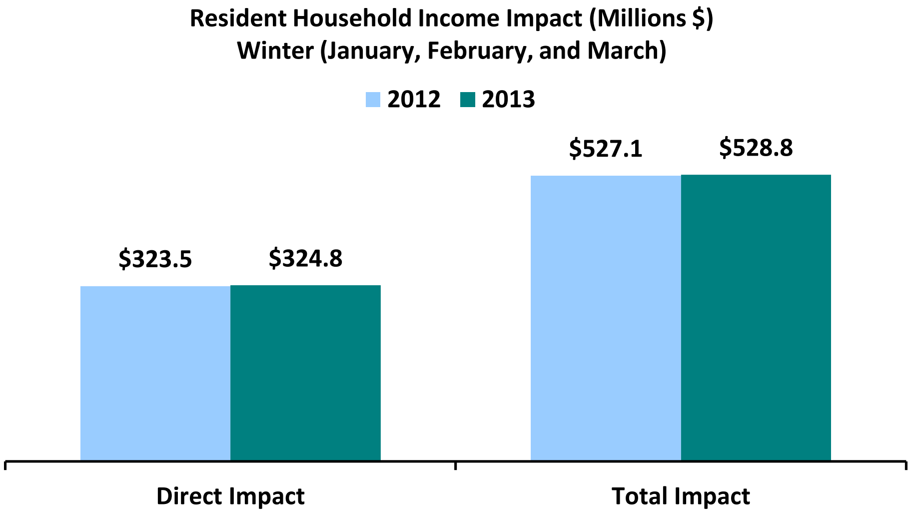
Impact on Household Income for Lee County Residents

As stated earlier, in order to produce the output (food, lodging, entertainment, etc.) purchased by visitors, businesses have to employ people. This requires business owners to pay wages and salaries to their employees, and also includes proprietary income for the business owner in some cases.

The wages and salaries paid in order to produce what is purchased with visitor expenditures is the household income impact of the visitor expenditures.

Direct household income impact includes the direct wages and salaries paid in order to produce the goods and services purchased with the visitor expenditures.

Total household income includes the wages and salaries paid in order to produce the goods and services purchased with the visitor expenditures PLUS the wages and salaries necessary to produce the additional output purchased with the recirculation of money in Lee County. For example, wages brought home by a hotel desk clerk are then used to purchase food and services for that person and his/her family, leading to additional wages and salaries being paid to others (grocery store employee, utility crews, etc.).



Impact on State and Local Government Revenues

In producing and selling any goods and services purchased by visitors, both local and state revenues are collected by local and state governments.

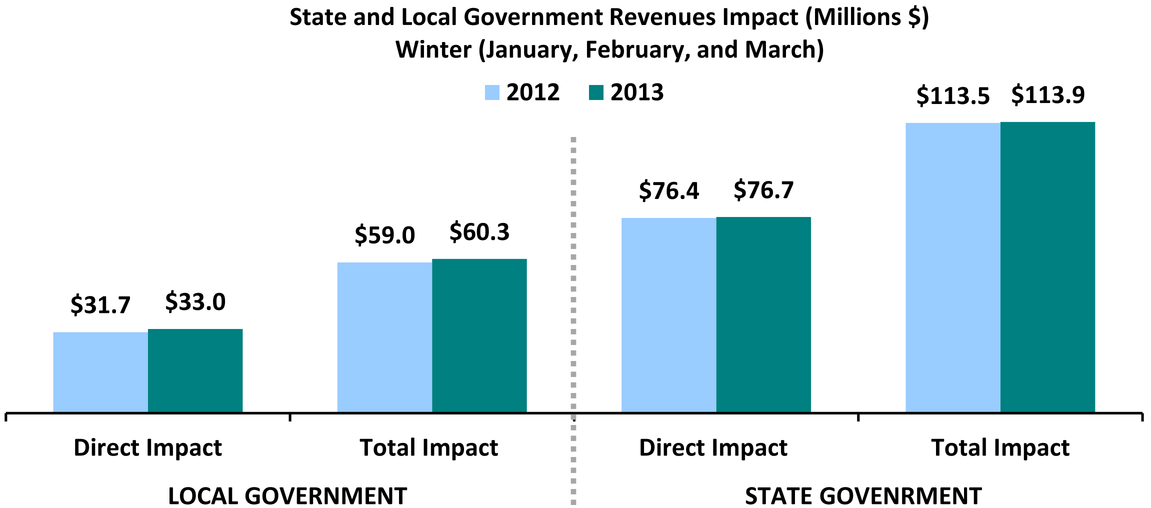
The gross government revenues accruing to governments as a result of producing the output purchased with visitor expenditures is the government revenue impact.

Local government revenue impact is a result of revenues provided to the local (Lee County) government. This includes the bed tax, local property tax, any local-option sales tax, and any operating income for local government agencies.

State government revenue impact is a result of revenues provided to the Florida state government. This includes sales tax and any operating income for state government agencies.

The following are included in government revenues as appropriate for the local area; gasoline taxes, vehicle licenses and registrations, boat registrations, hunting and fishing licenses, liquor taxes, local and state park user fees, etc.

Tax ratios used to calculate these government revenue impacts are adjusted to conform to data reported in State and Local Government Finance Data (SLGF, Bureau of the Census).



Appendix

Winter 2013

January 2013 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Bonita Springs	Bonita Beach	1/2/13	32
Fort Myers	Edison Estates	1/3/13	27
Sanibel	Lighthouse Beach	1/9/13	11
Sanibel	Sanibel Inn	1/9/13	5
Sanibel	Sanibel Arms West	1/9/13	8
Sanibel	Song of the Sea	1/9/13	6
Sanibel	Sandalfoot Condos	1/9/13	5
Fort Myers	RSW Airport	1/12/13	30
Fort Myers Beach	Neptune Inn	1/14/13	10
Fort Myers Beach	Diamond Head	1/14/13	10
Fort Myers Beach	Estero Beach Club	1/14/13	12
North Fort Myers	Shell Factory	1/19/13	15
Fort Myers	Centennial Park	1/19/13	5
Cape Coral	Cape Coral Yacht Club	1/21/13	14
Fort Myers Beach	Best Western	1/22/13	10
Fort Myers Beach	Gateway Villas	1/22/13	4
Fort Myers Beach	Windward Passage	1/22/13	6
Fort Myers Beach	Pink Shell	1/22/13	9
Fort Myers Beach	Times Square	1/22/13	5
Sanibel	Holiday Inn	1/24/13	7
Sanibel	Sundial Resort	1/24/13	8
Sanibel	Oceans Reach	1/24/13	5
Sanibel	Casa Ybel Resort	1/24/13	8
Sanibel	Pointe Santo	1/24/13	5
Fort Myers	RSW Airport	1/26/13	29
Fort Myers	Crowne Plaza	1/28/13	6
Fort Myers	Edison Estates	1/30/13	12
Total			**304**

February 2013 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Fort Myers Beach	Times Square	2/1/13	10
Fort Myers Beach	Neptune Inn	2/1/13	5
Fort Myers Beach	Estero Island Beach Club	2/1/13	10
Fort Myers Beach	Diamond Head Resort	2/1/13	10
Fort Myers	RSW Airport	2/2/13	30
Fort Myers	Edison Estates	2/5/13	31
Sanibel	Holiday Inn	2/12/13	8
Sanibel	Loggerhead Cay	2/12/13	10
Sanibel	Tortuga Beach Club Resort	2/12/13	7
Sanibel	Sanibel Inn	2/12/13	5
Bonita Springs	Bonita Beach	2/15/13	34
Fort Myers	RSW Airport	2/16/13	31
Sanibel	Pointe Santo	2/19/13	10
Sanibel	Sanibel Cottages	2/19/13	5
Sanibel	Sundial Resort	2/19/13	10
Sanibel	Lighthouse Beach	2/19/13	12
Fort Myers Beach	Best Western	2/22/13	10
Fort Myers Beach	Windward Passage	2/22/13	7
Fort Myers Beach	Cane Palm	2/22/13	5
Fort Myers Beach	Pink Shell	2/22/13	10
Fort Myers	Crowne Plaza	2/23/13	5
Fort Myers	Centennial Park	2/23/13	9
North Fort Myers	Shell Factory	2/25/13	14
Cape Coral	Cape Coral Yacht Club	2/26/13	10
Fort Myers	Edison Estates	2/28/13	10
Total			**308**

March 2013 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Fort Myers	RSW Airport	3/2/13	30
Fort Myers Beach	Times Square	3/5/13	5
Fort Myers Beach	Neptune Inn	3/5/13	10
Fort Myers Beach	Diamond Head Resort	3/5/13	10
Fort Myers Beach	Estero Island Beach Club	3/5/13	10
Fort Myers	Edison Estates	3/6/13	25
Sanibel	Periwinkle Campground	3/11/13	5
Sanibel	Sundial Resort	3/11/13	10
Sanibel	Pelican Roost	3/11/13	5
Sanibel	Surfside Sanibel	3/11/13	4
Sanibel	Holiday Inn	3/11/13	10
Fort Myers	Hammond Stadium-Twins	3/18/13	25
Fort Myers	Jet Blue Stadium-Red Sox	3/19/13	30
Sanibel	Coquina Beach	3/21/13	10
Sanibel	Sanibel Beach Club	3/21/13	5
Sanibel	Tortuga Beach Club Resort	3/21/13	5
Sanibel	Loggerhead Cay	3/21/13	10
Cape Coral	Cape Coral Yacht Club	3/25/13	8
North Fort Myers	Shell Factory	3/25/13	8
Fort Myers	Edison Estates	3/28/13	15
Fort Myers Beach	Best Western	3/29/13	10
Fort Myers Beach	Cane Palm	3/29/13	6
Sanibel	Casa Ybel Resort	3/29/13	8
Fort Myers Beach	Windward Passage	3/29/13	10
Fort Myers	RSW Airport	3/30/13	30
Total			**304**

Occupancy Interviewing Statistics

Interviews were conducted during the first two weeks of April 2013 to gather data for January, February, and March 2013 lodging activity. Information was provided by 110 Lee County lodging properties.

Lodging Type	Winter 2012 Number of Interviews
Hotel/Motel/Resort/B&Bs	69
Condo/Cottage/Vacation Home/Timeshare	26
RV Park/Campground	15
Total	**110**