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Kissimmee Visitor Profile September 2015

Prepared for:

Experience Kissimmee

Prepared by:

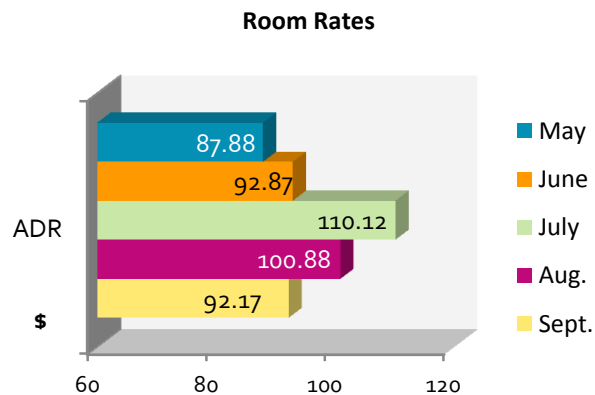
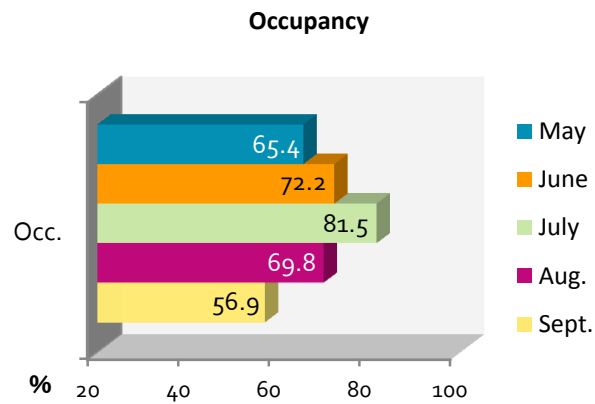
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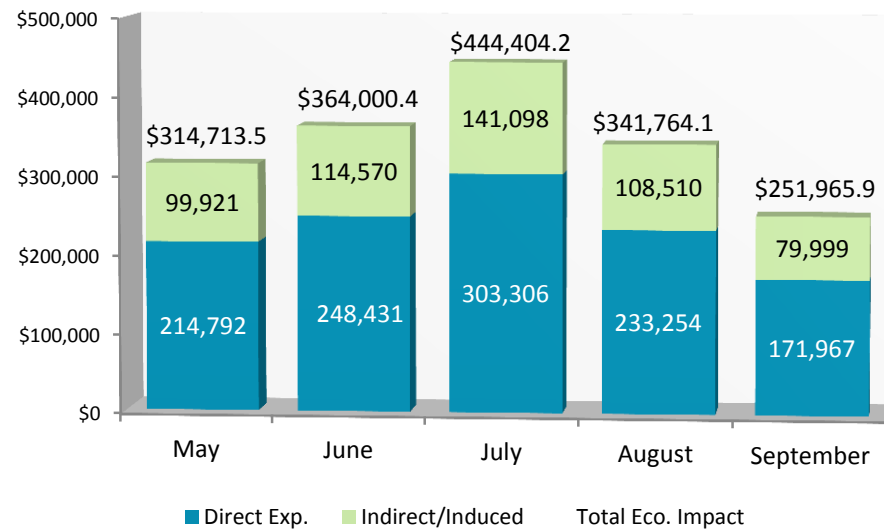
November 2015

<i>H/M/C* Visitor Statistics</i>	2015		
	Winter/Spring	Summer	September
Visitors (#)	2,033,400	2,086,200	420,200
Room Nights	2,784,700	2,580,200	504,600
Direct Exp. (\$)	\$1,136,692,000	\$999,783,100	\$171,966,900
Total Economic Impact (\$)	\$1,665,481,100	\$1,464,882,200	\$251,965,900

* Visitors staying in commercial lodging subject to the resort tax (hotel/motel/condo, etc.)



May - September 2015 Economic Impact (in thousands)

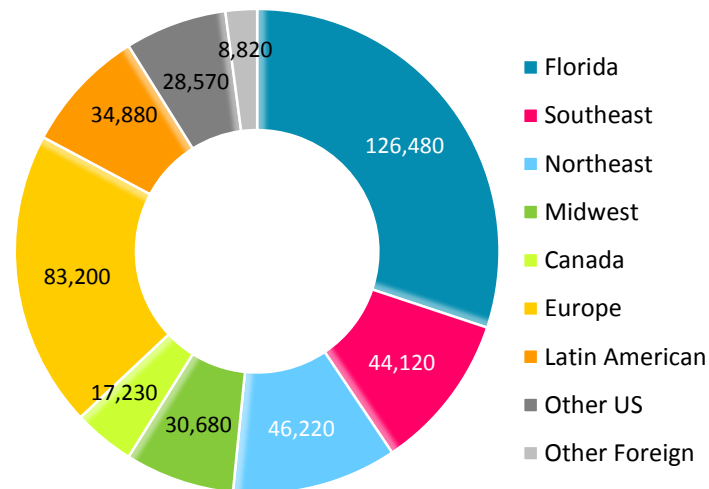


<i>Lodging Statistics</i>	2015		
	Winter/Spring	Summer	September
Occupancy	79.0%	72.2%	56.9%
Room Rates	\$103.68	\$97.94	\$92.17
RevPAR	\$81.91	\$71.17	\$52.44

September 2015 Visitor Origin Markets

Visitor Origins	Winter/Spring		Summer		September	
	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors	Share of Mkt (%)	Number of Visitors
Florida	25.4%	515,470	33.5%	698,610	30.1%	126,480
Southeast	9.8	198,110	12.7	264,550	10.5	44,120
Northeast	15.8	321,360	10.7	224,140	11.0	46,220
Midwest	15.1	307,120	8.2	172,010	7.3	30,680
Canada	8.9	181,820	4.8	100,130	4.1	17,230
Europe	10.1	205,310	14.9	310,290	19.8	83,200
Latin American	4.8	97,630	6.0	125,120	8.3	34,880
Other US	7.8	159,260	7.5	156,770	6.8	28,570
Other Foreign	2.3	47,320	1.7	34,580	2.1	8,820
Total	100.0	2,033,400	100.0	2,086,200	100.0	420,200

September 2015 Visitor Origins



Kissimmee:

September 2015 Visitor Profile



Visitor Profile Metrics:

Length of Stay (Nights)	Win./Spr.	May	June	July	August	Summer	September
Away from Home	9.1	7.7	8.2	8.0	8.1	8.0	7.8
In the Kissimmee Area	6.1	5.2	6.4	6.4	6.2	5.9	5.3
Party Size	Win./Spr.	May	June	July	August	Summer	September
Number of People	4.0	4.1	4.3	4.4	4.3	4.3	4.0
Party Composition	Win./Spr.	May	June	July	August	Summer	September
% of Parties Traveling with Children	51.9%	51.3%	55.1%	60.4%	46.3%	53.3%	32.8%
% of Parties Traveling with Seniors	33.8	27.8	25.8	25.4	32.4	27.9	35.6
Kissimmee Area Base Budget	Win./Spr.	May	June	July	August	Summer	September
Per Person/Trip	\$559.01	\$409.44	\$468.56	\$544.34	\$491.89	\$479.24	\$409.25
Per Person/Night	91.64	78.74	80.79	85.05	79.34	81.23	77.22
Total Party/Trip	\$2,236.04	\$1,678.70	\$2,014.79	\$2,395.10	\$2,115.13	\$2,060.73	\$1,637.00
Transportation (Multiple Response) (Percentaged to the Base of All Respondents)	Win./Spr.	May	June	July	August	Summer	September
Plane	50.7%	46.6%	45.6%	44.1%	45.2%	45.4%	52.8%
Rental Car	28.8	24.3	23.0	24.4	25.4	23.6	21.2
Personal Car	44.4	51.5	49.7	50.3	46.7	49.5	42.1
Airport Deplaned (Base: Flew)	Win./Spr.	May	June	July	August	Summer	September
Orlando International	72.2%	76.5%	78.5%	80.2%	80.5%	78.9%	83.2%
Tampa International	9.1	4.8	4.0	4.1	2.7	3.9	0.9
Sanford	6.5	8.5	10.2	8.2	6.3	8.3	9.3
Miami International	5.2	5.5	4.0	4.8	5.4	4.9	5.1

Visitor Profile:

Purpose of Trip (Multiple Response)

A. Profile Data

	Win./Spr.	May	June	July	August	Summer	September
Vacation	85.8%	81.8%	81.4%	82.8%	78.3%	81.0%	82.1%
To Visit Central Florida Attractions	41.7	45.0	43.6	42.0	39.2	42.4	38.0
Getaway	32.2	30.3	30.6	31.3	26.9	29.8	28.9
Visit with Friends/Relatives	13.3	14.1	15.1	15.5	17.1	15.5	18.2
Sports Events/Tournament	4.9	2.8	1.6	2.6	2.8	2.4	10.2
Family Reunion	4.6	3.0	3.9	5.0	3.8	3.9	2.8
Special Events/Festival	4.3	3.6	3.8	3.2	2.5	3.3	4.7

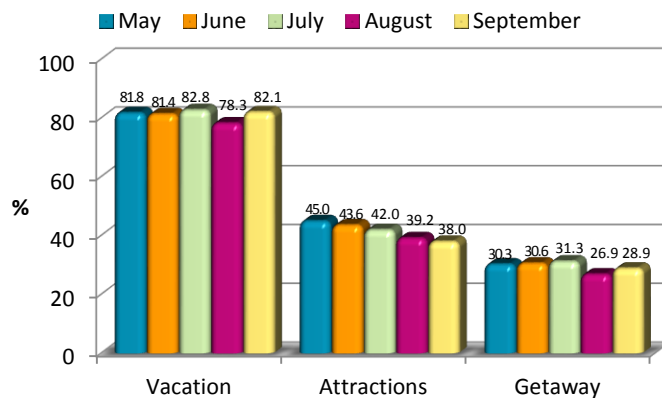
B. Occupancy Survey Data

	Win./Spr.	May	June	July	August	Summer	September
Group	23.0%	20.6%	22.8%	19.4%	15.6%	19.6%	18.9%

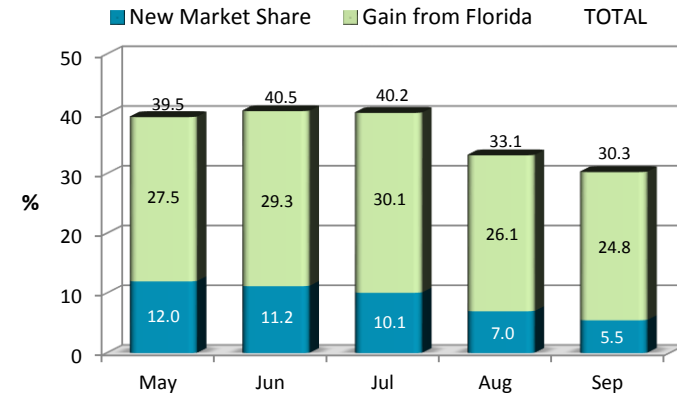
First Visit to (% yes)

	Win./Spr.	May	June	July	August	Summer	September
Kissimmee Area (Staying in Commercial Lodging)	38.7%	39.5%	40.5%	40.2%	33.1%	38.3%	30.3%
Florida	10.9	12.0	11.2	10.1	7.0	10.1	5.5

Purpose of Trip (Top Three)

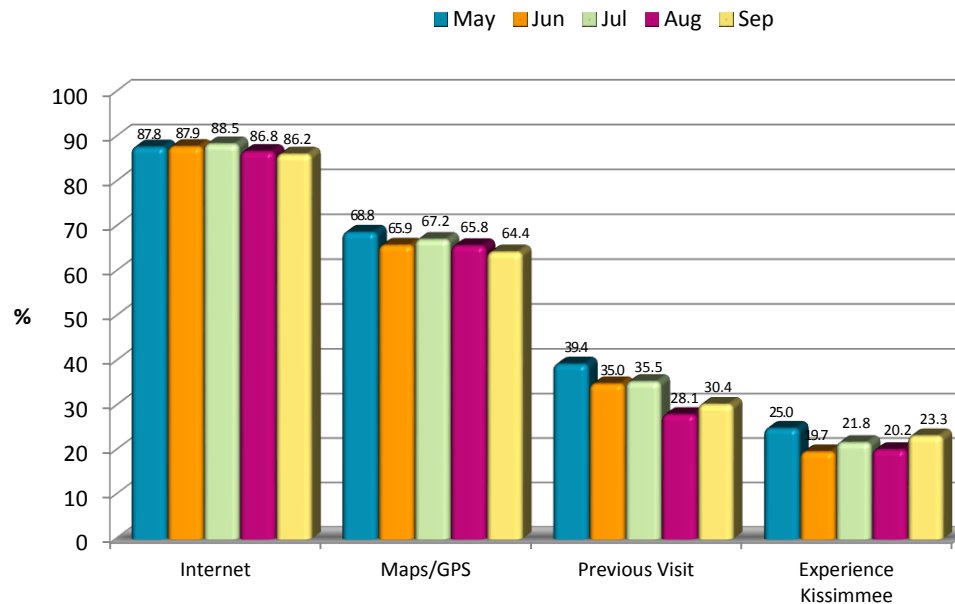


First Visit to Kissimmee (% Yes)



Information Most Helpful to Visit*(Open Ended Multiple Response)*

	Win./Spr.	May	June	July	August	Summer	September
Internet	85.7%	87.8%	87.9%	88.5%	86.8%	87.8%	86.2%
Maps/GPS	64.7	68.8	65.9	67.2	65.8	66.9	64.4
Previous Visit	35.2	39.4	35.0	35.5	28.1	34.4	30.4
Experience Kissimmee	27.5	25.0	19.7	21.8	20.2	21.6	23.3
Print Media	36.0	27.5	27.0	29.5	26.2	27.5	23.0
Hotel/Accommodations	27.3	29.1	27.3	26.8	21.3	26.1	16.8
Family	14.7	20.7	16.3	17.4	14.7	17.2	11.8
Mobile App	11.5	12.8	15.7	15.9	16.2	15.2	11.8
Travel Professional	6.1	9.2	7.3	9.1	11.8	9.3	9.8
Recommendation	21.8	19.5	18.1	19.3	13.9	17.7	9.5
AAA	13.6	11.1	10.8	8.9	7.9	9.7	9.3

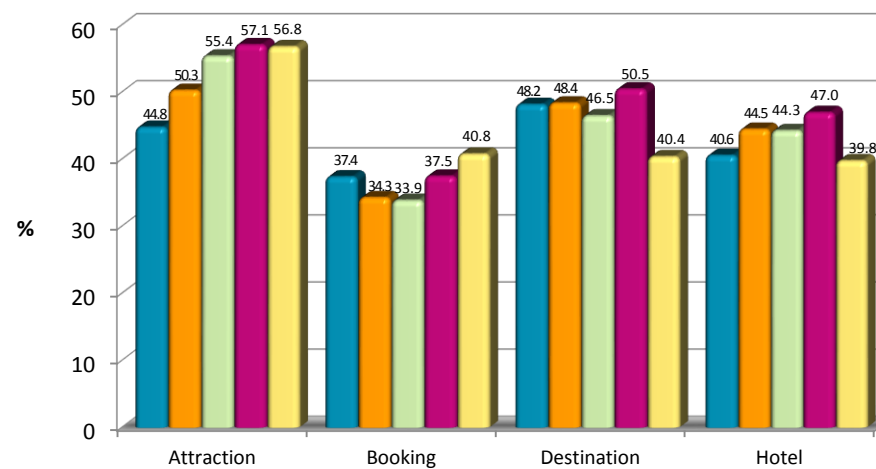
Information Most Helpful To Visit (Top Four)

Internet Information Sources Consulted*(Open Ended Multiple Response)*

	Win/Spr.	May	June	July	August	Summer	September
Attraction Websites	51.5%	44.8%	50.3%	55.4%	57.1%	52.0%	56.8%
Booking Sites	34.7	37.4	34.3	33.9	37.5	35.7	40.8
Destination Websites	54.6	48.2	48.4	46.5	50.5	48.4	40.4
Hotel Websites	45.5	40.6	44.5	44.3	47.0	44.1	39.8
Airline Websites	38.2	32.7	30.5	28.0	26.7	29.5	34.1
Rental Car Websites	35.0	25.8	26.9	27.5	25.2	26.3	29.2
Mapping Sites	34.4	36.7	28.5	29.6	24.7	29.8	26.9
Restaurant Websites	26.5	25.1	26.4	31.5	30.3	28.3	25.8
Review/Rating Sites	28.4	30.1	31.4	32.5	26.9	30.2	23.6
Weather Sites	28.6	29.3	22.3	20.5	16.2	22.0	15.2
Daily Deal/Coupon Sites	17.0	15.0	15.6	17.4	14.7	15.7	12.3
Social Networking Sites	12.2	13.8	12.6	11.1	10.2	11.9	8.4

Internet Information Sources Consulted (Top Four)

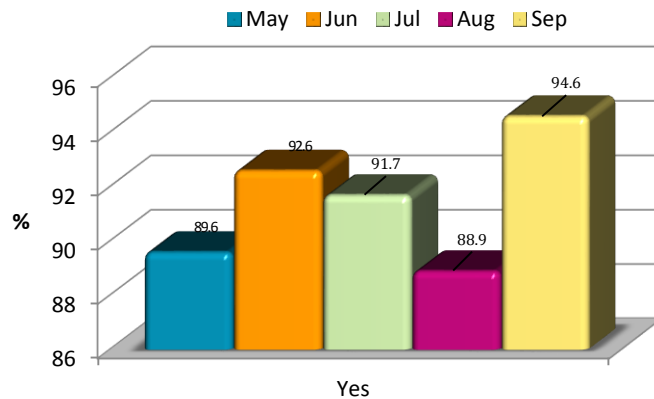
■ May ■ Jun ■ Jul ■ Aug ■ Sep



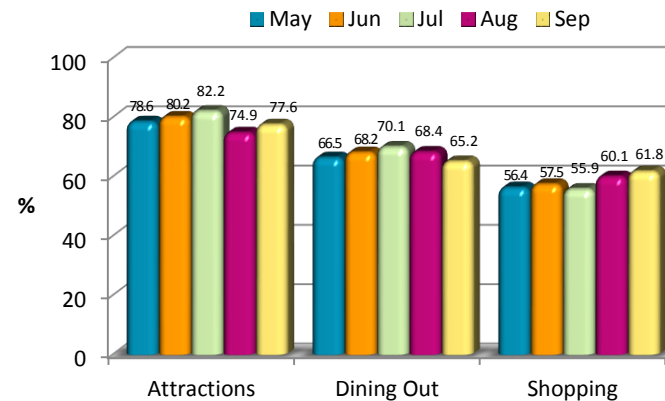
Made Lodging Reservations	Win./Spr.	May	June	July	August	Summer	September
Yes	92.6%	89.6%	92.6%	91.7%	88.9%	90.7%	94.6%
No/Don't Know	7.4	10.4	7.4	8.3	11.1	9.3	5.4

Activities Enjoyed (Open Ended Multiple Response)	Win./Spr.	May	June	July	August	Summer	September
Attractions/Theme Parks	75.7%	78.6%	80.2%	82.2%	74.9%	79.0%	77.6%
Dining Out	65.9	66.5	68.2	70.1	68.4	68.3	65.2
Shopping	62.6	56.4	57.5	55.9	60.1	57.5	61.8
Relaxing	55.4	52.9	52.4	56.6	60.3	55.6	52.8
Pool	47.4	43.6	50.2	56.3	56.4	51.7	44.3
Sight Seeing	42.4	34.2	33.6	32.1	37.2	34.3	32.0
Swimming	32.7	33.3	40.8	48.9	38.9	40.5	31.3
Reading	27.2	25.4	22.5	22.4	25.0	23.8	22.9
Miniature Golf	17.8	12.6	15.1	19.0	17.7	16.1	22.2
Visiting with Friends/Relatives	16.6	15.1	14.8	14.5	16.4	15.2	18.3
Bars/Nightlife	17.3	20.9	20.0	21.3	18.3	20.1	14.6
Airboats	9.6	8.4	9.6	10.5	9.5	9.5	11.3
Photography	19.2	17.4	17.7	19.2	12.7	16.7	10.7
Wildlife/Environment	13.7	10.2	11.7	14.2	11.3	11.9	10.5

Made Reservations



Activities Enjoyed (Top Three)



Attractions/Theme Parks Visited

(Open Ended Multiple Response)

	Win./Spr.	May	June	July	August	Summer	September
Disney World	62.5%	63.3%	62.3%	62.8%	58.9%	61.8%	62.5%
Universal	39.1	42.4	41.9	44.7	43.3	43.1	45.8
Downtown Disney/Disney Springs	21.8	19.3	22.2	20.1	31.9	23.4	29.2
City Walk	22.6	20.5	21.1	23.6	20.3	21.3	28.6
Fun Spot/Old Town	16.7	19.4	17.9	15.9	17.8	17.7	17.5
SeaWorld	20.9	17.4	18.0	16.6	16.3	17.1	15.0

Satisfaction with Kissimmee

Satisfied (Combined)

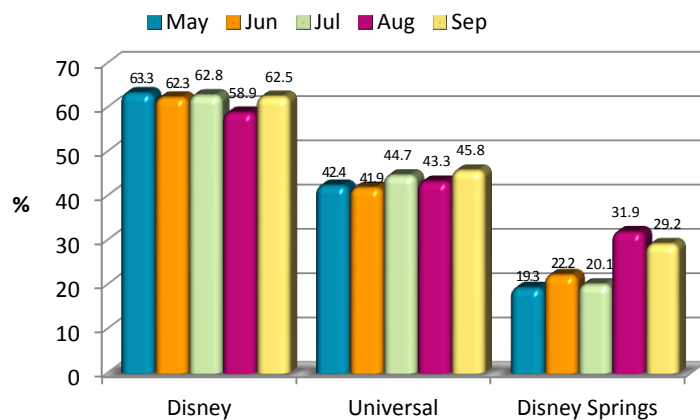
	Win./Spr.	May	June	July	August	Summer	September
Satisfied (Combined)	96.4%	97.6%	96.8%	96.1%	95.7%	96.6%	96.5%

Plan to Return (% Yes)

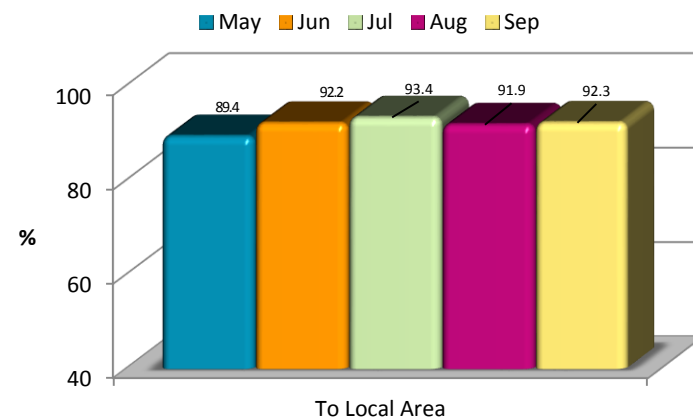
To Local Area

	Win./Spr.	May	June	July	August	Summer	September
To Local Area	89.3%	89.4%	92.2%	93.4%	91.9%	91.8%	92.3%

Theme Parks Visited (Top Three)



Plan to Return



Demographics	Win./Spr.	May	June	July	August	Summer	September
Average Age Head of Household	51.7	48.5	47.9	45.6	47.6	46.2	49.8
Median Annual Household Income	\$89,709	\$90,689	\$95,418	\$99,630	\$109,498	\$98,809	\$94,939

Book Reservations for Trip Online	Win./Spr.	May	June	July	August	Summer	September
% Yes	77.8%	75.3%	77.4%	77.9%	75.2%	76.5%	78.3%

Occupancy Survey Data 2015

Compared to the same time in 2014, OVER THE NEXT THREE MONTHS, properties report reservations:	Win./Spr.	May	June	July	August	Summer	September
Up	52.0%	55.6%	48.4%	37.0%	41.4%	45.6%	56.9%
Same	32.0	27.8	35.5	40.7	36.3	35.1	34.1
Down	12.0	16.7	9.7	11.1	17.6	13.8	4.7
Don't Know	4.0	N/A	6.5	11.1	4.7	5.6	4.3