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

2017 Annual Visitor Profile and Occupancy Analysis (January-December)

February 28, 2018

Prepared for:

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

Prepared by:

Davidson-Peterson Associates

Executive Summary
2017

<u>*A Note About "Statistical Significance"*</u>

(Statistically significant difference = a difference that is large enough that it is not likely to occur by chance)

This report includes comparisons between data collected last year (2016) and data collected this year (2017). In most cases, slight differences will be seen between the two years' values due to random differences in the respondents taking the survey in each year. When these differences are not likely to be due to chance, then they are <u>statistically significant</u>.

A difference is said to be statistically significant (at the 95% confidence level) if the <u>probability of the difference occurring purely by chance</u> is less than 5%. In other words, if the same question were asked 100 times, these differences would be seen by chance in fewer than five of those instances.

Throughout this report, differences that rise to the level of statistical significance are marked by letters showing which column the marked percentage is significantly greater than. For example, the "A" in Column B of the table below indicates that 70% is statistically greater than the 60% in Column A.

2016 A	2017 B
60%	70%A

Executive Summary

Introduction

The following report summarizes the results from the Lee County Visitor Profile and Occupancy research study for Calendar Year 2017, with comparisons to Calendar Year 2016. The research is conducted throughout the year and includes surveys of:

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

Where referenced the seasons are defined as follows:

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

Executive Summary

Visitation Estimates

- During calendar year 2017, Lee County hosted an estimated 4.8 million visitors. Almost two thirds of these visitors stayed in paid accommodations on their trip, while the remainder stayed with friends or relatives.

- While 2017 visitation among paid accommodations was similar to 2016, Lee County saw a slight decline in visitors staying with friends or relatives (-1.6%).

- As a result, there was no significant change in overall visitation year over year (-0.2%).

Estimated Visitation	2016	2017	% Change
Paid Accommodations	3,009,619	3,027,400	0.6%
Friends/Relatives	1,799,058	1,769,994	-1.6%
Total Visitation	**4,808,677**	**4,797,394**	**-0.2%**

Visitor Expenditures

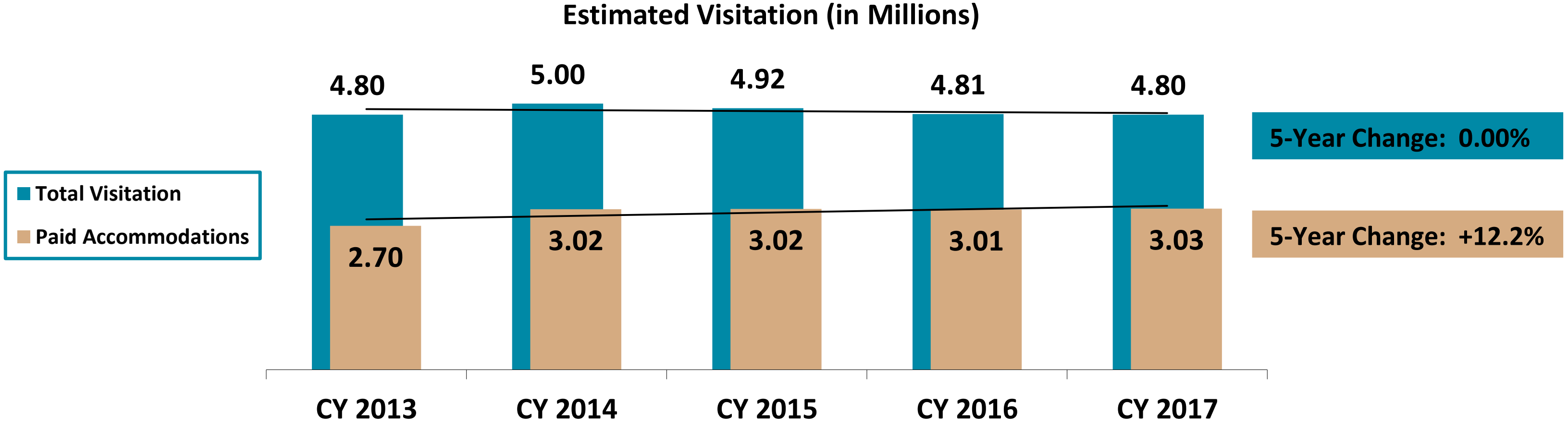
- Visitors spent an estimated $3.1 billion in Lee County during 2017, a 1.6% increase over 2016.

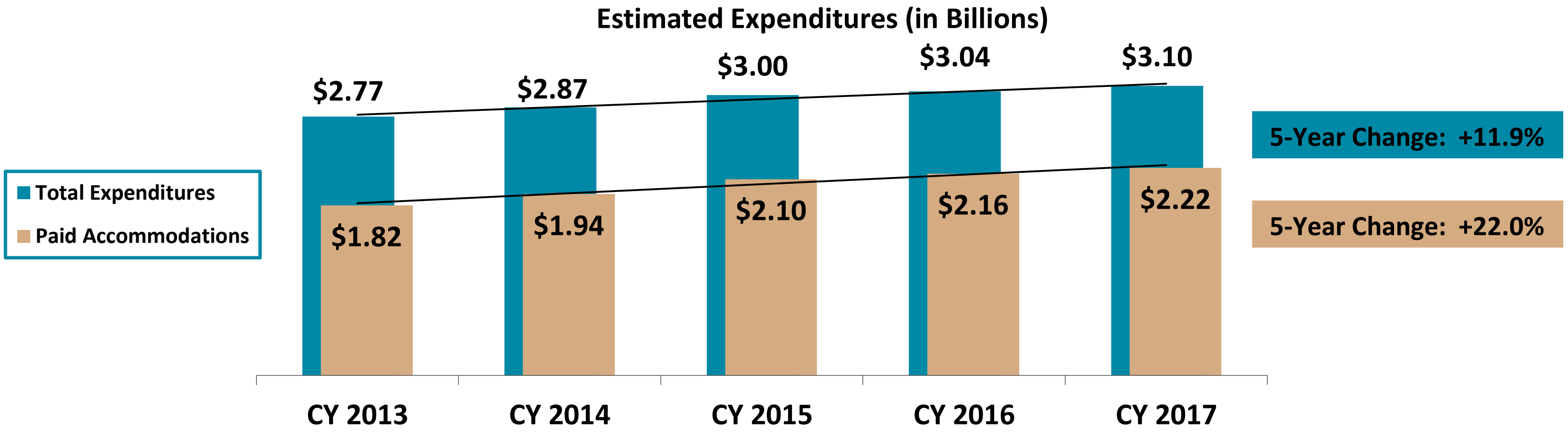
- Visitors staying in paid accommodations contributed 2.2 billion (72% of the total), representing a 3.0% increase over 2016. However, the VFR traveler segment showed a slight decline (-1.6%).

Estimated Expenditures	2016	2017	% Change
Paid Accommodations	$2,158,616,806	$2,222,342,586	3.0%
Friends/Relatives	$876,562,864	$862,829,417	-1.6%
Total Expenditures	**$3,035,179,670**	**$3,085,172,003**	**1.6%**

5-Year Trends in Visitation and Expenditures

- While estimated visitation in 2017 is on par with visitation levels five years ago, estimated visitor expenditures have climbed 11.9% since 2013. Increases are even more significant when looking at visitors staying in paid accommodations – paid accommodations visitation has grown 12.2% over the past five years, and expenditures among those staying in paid accommodations has grown 22%.





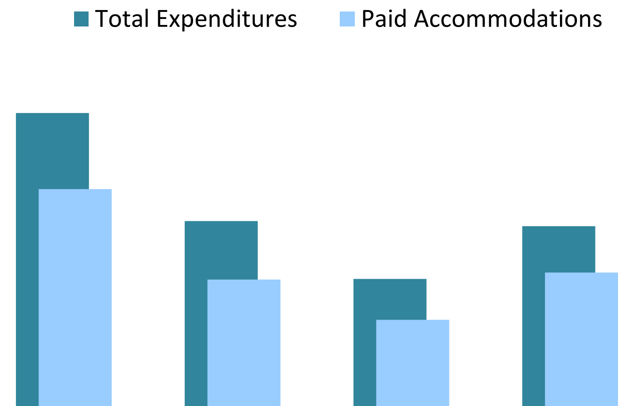
Visitation and Expenditure Estimates by Season

- The winter and spring seasons drove the highest levels of visitation during 2017. Visitor spending was highest during the winter season, amounting to 37% of the total expenditures for 2017.

Estimated Visitation

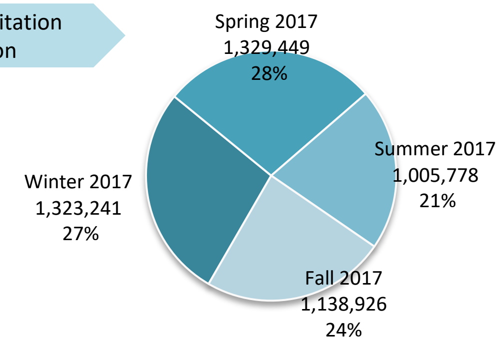
	Winter 2017	Spring 2017	Summer 2017	Fall 2017
Total Visitation	1,323,241	1,329,449	1,005,778	1,138,926
Paid Accommodations	728,209	853,367	659,272	786,552

Estimated Expenditures

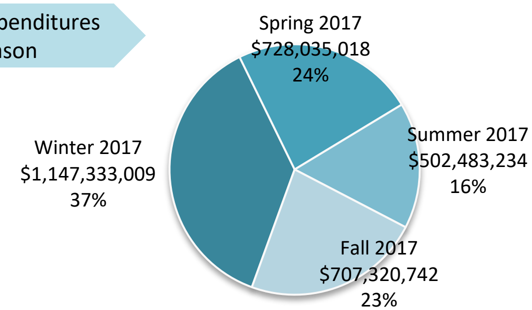


	Winter 2017	Spring 2017	Summer 2017	Fall 2017
Total Expenditures	$1,147,333,009	$728,035,018	$502,483,234	$707,320,742
Paid Accommodations	$851,964,885	$500,090,495	$343,461,668	$526,825,538

% of Total Visitation by Season



% of Total Expenditures by Season



Visitor Origin

- The majority of 2017 visitors staying in paid accommodations were United States residents (79%), representing nearly 2.4 million visitors. International markets delivered just under 640,000 visitors to Lee County's lodging establishments – with Canada and Germany being the top contributors.

- Nearly half of domestic paid accommodations guests came from the Midwest (47%). The Northeast (25%) and South (24%) contributed about one-quarter each, with very few coming from the West (4%).

- New York was the leading domestic feeder market for the Lee County lodging industry during 2017, followed by Boston, Chicago, and Minneapolis. The key Florida market was Miami.

Visitors Staying in Paid Accommodations

	%		Visitor Estimates		Direction of
Country of Origin	**2016**	**2017**	**2016**	**2017**	**Change**
United States	73%	79%	2,210,778	2,387,914	+
Canada	6%	8%	174,572	252,785	+
Germany	11%	6%	322,609	189,589	-
UK	5%	3%	157,813	81,252	-
Other International	5%	4%	143,847	115,860	-

Visitors Staying in Paid Accommodations

	%		Visitor Estimates		Direction of
U.S. Region of Origin	**2016**	**2017**	**2016**	**2017**	**Change**
Florida	8%	7%	183,942	166,960	-
South (including Florida)	25%	24%	560,503	564,946	+
Midwest	46%	47%	1,022,094	1,120,184	+
Northeast	23%	25%	517,121	597,949	+
West	5%	4%	111,059	104,835	-

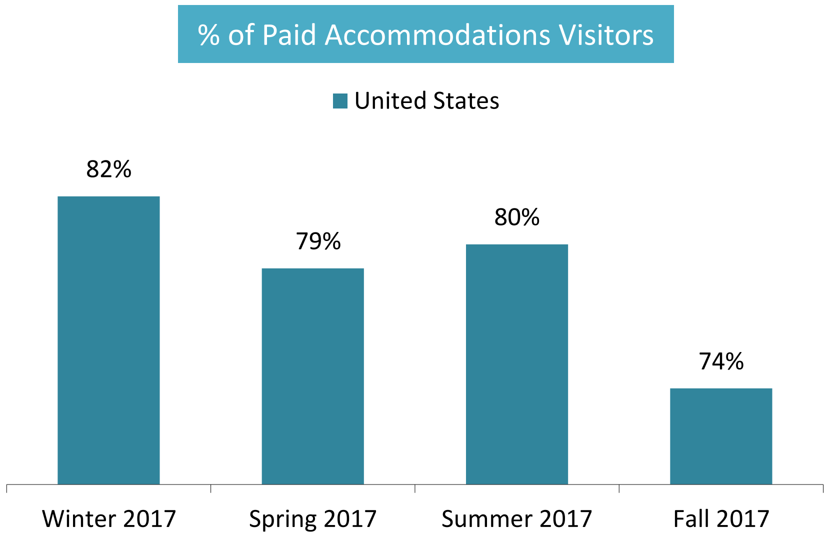
2017 Top DMAs (Paid Accommodations)

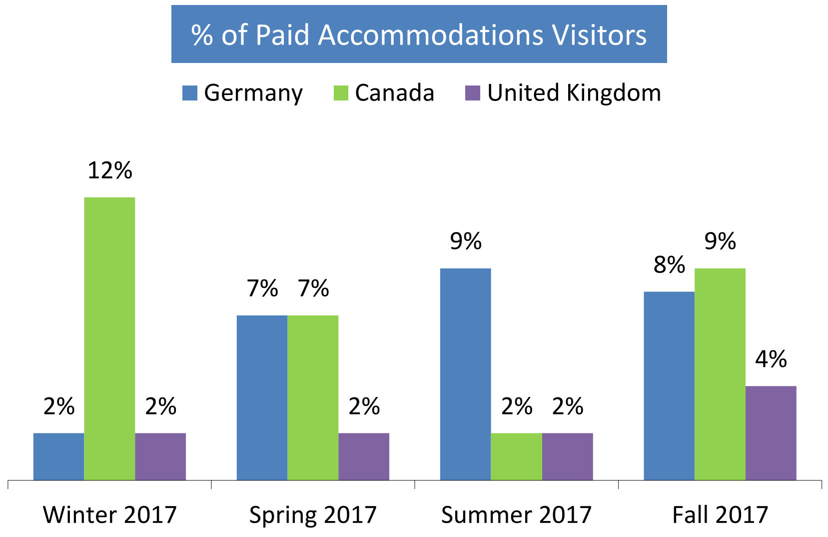
New York	5.9%	139,780	1
Boston (Manchester, NH)	5.7%	135,898	2
Chicago	5.6%	133,956	3
Minneapolis-Saint Paul	5.2%	124,249	4
Cleveland-Akron (Canton)	3.8%	91,246	5
Indianapolis	3.7%	87,363	6
Detroit	3.4%	81,539	7
Miami-Fort Lauderdale	2.8%	66,007	8
Saint Louis	2.7%	64,066	9
Columbus, OH	2.5%	60,183	10

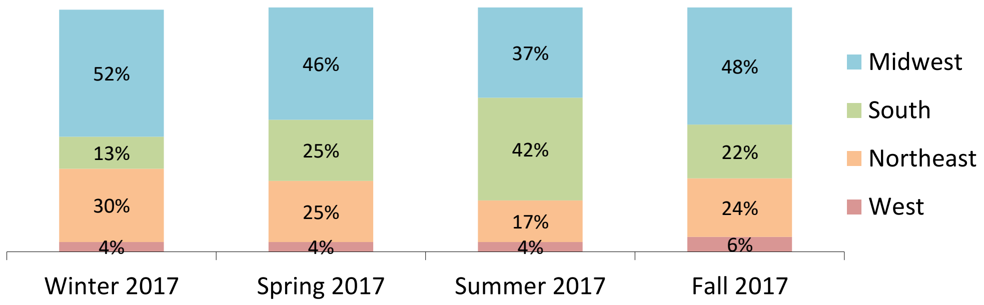
Note: The percentage of visitors by origin market is based on data collected from visitors in the Visitor Profile Survey.

Visitor Origins by Season

- Visitor origin distribution varied by season. While the U.S. markets dominated as the majority each season, the proportion of U.S. residents staying in Lee County paid accommodations was highest in the winter season and lowest in the fall.
- U.S. visitors from the Midwest were more likely to visit during the winter, spring, and fall seasons, while visitors from the South were more likely to visit Lee County during the summer.
- On the international front, Germans contributed a larger share in the spring, summer, and fall seasons while Canadians were most prevalent during the winter.







Trip Planning

- Most visitors started planning their Lee County trip well in advance of arrival. Seven in ten started talking about their Lee County trip three or more months in advance, and nearly two-thirds selected the destination within that timeframe. Fewer made their lodging reservations within that timeframe.

    - 69% started talking about trip 3+ months in advance (vs. 70% in 2016)
    - 63% chose Lee County for trip 3+ months in advance (vs. 64% in 2016)
    - 58% made lodging reservation 3+ months in advance (vs. 60% in 2016)

- The Internet continues to be an instrumental planning tool for visitors in 2017 (86%). Four in ten mentioned using airline websites – the highest level of mentions (44%). Fewer 2017 visitors used search engines (28%), hotel websites (24%), vacation rental websites (23% - a slight decrease from last year's 27%), booking websites (22%), and Trip Advisor (21%) to aid in planning their trip.

- Many 2017 visitors said they access online destination planning information using multiple devices – with smartphones and laptop computers being most prevalent (59% and 56% respectively).

- The attributes that 2017 visitors rated highest for having positively influenced their selection of Lee County as a destination were:

    - *Warm weather (87%),*
    - *Peaceful/relaxing (85%),*
    - *White sandy beaches (80% - an increase from last year's 77%),*
    - *A safe destination (76%),*
    - *Clean, unspoiled environment (71%),* and
    - *Convenient location (70%).*

Trip Profile

- Flying continues to be the primary means of transportation to Lee County among 2017 visitors, with three-fourths flying to the area (76% vs. 71% in 2016). Four in five air travelers deplaned at Southwest Florida International Airport (82%).

- Three-fourths of visitors in 2017 had been to Lee County before (74% vs. 68% in 2016). As seen last year, eight in ten visitors said the purpose of their trip was to vacation (85%), while one-third indicated they were visiting friends or relatives (34%).

- Six in ten visitors surveyed said they were staying overnight in paid accommodations during their 2017 Lee County trip. More than half of paid accommodations guests indicated they were staying in a hotel/motel/resort (56% - an increase from last year's 47%). Fewer stayed in a condo/vacation home property (41% - a decrease from last year's 50%), and a small minority stayed at an RV park/campground (3%). The majority felt the quality of their lodging *met expectations* (56%), and two in five said the quality *far exceeded* or *exceeded expectations* (38%).

- Almost all visitors claimed to be enjoying Lee County's *beaches* (94%) during their trip. Further, when asked which attractions they were visiting, beaches received the highest level of mentions at 86% (vs. 83% in 2016). Many visitors also enjoyed *dining out (75%), relaxing (72%), swimming (58%) and shopping* (56%) while in Lee County. Nearly half of 2017 visitors took a day trip outside the County (47%), and those that did were most likely to visit Naples (31%).

- Visitor satisfaction remains exceptionally high in Lee County – almost all 2017 visitors said they were either *very satisfied* or *satisfied* with their visit (56% and 38% respectively), and nearly as many indicated they would recommend Lee County to a friend over other areas in Florida (88% - an increase from last year's 85%). Additionally, most visitors said they are likely to return to Lee County themselves (90%), and six in ten of these travelers claimed they will return next year (60%).

- Negative reactions to specific aspects visitors may have disliked about the area during their visit emerged at low levels. The most pervasive complaint mentioned by 2017 visitors was *traffic (30%).* Far fewer mentioned *insects* (15%), *beach seaweed* (11% vs. 9% in 2016), *high prices* (10%), and *water quality* (9% vs. 12% in 2016) as unfavorable features.

Visitor and Travel Party Characteristics

- The composition of 2017 visitors and their travel parties can be summarized as follows:

  - 52 years of age on average (age of respondent)
  - $102,400 household income on average
  - 72% married
  - 40% traveling as a couple
  - 34% traveling as a family
  - 23% traveling *with* children
  - 3 people in travel party on average

Lodging Industry Assessments

- For the Lee County lodging industry in total, there was an increase of 160,547 in *occupied* room nights (+3.2%), from 2016 to 2017, as well as an increase of 62,397 *available* room nights (+0.8%).

	Occupied Room Nights			Available Room Nights		
	2016	2017	% Change	2016	2017	% Change
Hotel/Motel/Resort/B&B	2,906,967	2,958,106	1.8%	4,131,931	4,101,441	-0.7%
Condo/Cottage/Vacation Home	1,042,979	1,030,580	-1.2%	1,560,019	1,541,882	-1.2%
RV Park/Campground	1,044,021	1,165,828	11.7%	1,874,727	1,985,751	5.9%
Total	**4,993,967**	**5,154,514**	**3.2%**	**7,566,677**	**7,629,074**	**0.8%**

- The industry-wide average occupancy rate in Lee County increased slightly from 66.0% in 2016 to 67.6% in 2017 (+2.4%).
- Lee County's average daily rate presented no significant change year-over-year. Hotel/motel and condo/vacation homes saw modest growth in ADR versus the prior year.
- Due to the slight shifts in average occupancy rate and ADR, overall revenue per available room saw a 2.1% increase from 2016 to 2017.

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2016	2017	% Change	2016	2017	% Change	2016	2017	% Change
Hotel/Motel/Resort/B&B	70.4%	72.1%	2.5%	$156.20	$157.96	1.1%	$109.89	$113.93	3.7%
Condo/Cottage/Vacation Home	66.9%	66.8%	0.0%	$209.08	$213.71	2.2%	$139.79	$142.84	2.2%
RV Park/Campground	55.7%	58.7%	5.4%	$56.84	$56.11	-1.3%	$31.65	$32.94	4.1%
AVERAGE	**66.0%**	**67.6%**	**2.4%**	**$146.47**	**$146.07**	**-0.3%**	**$96.67**	**$98.69**	**2.1%**

2017 Lee County Snapshot

Total Visitation

	%		Visitor Estimates	
	2016	2017	2016	2017
Paid Accommodations	63%	63%	3,009,619	3,027,400
Friends/Relatives	37%	37%	1,799,058	1,769,994
Total Visitation			**4,808,677**	**4,797,394**

Total Visitor Expenditures

	2016	2017	% Change
Total Visitor Expenditures	$3,035,179,670	$3,085,172,003	1.6%
Paid Accommodations	$2,158,616,806	$2,222,342,586	3.0%

Visitor Origin - Visitors Staying in Paid Accommodations

	%		Visitor Estimates	
	2016	2017	2016	2017
Florida	8%	7%	183,942	166,960
US	73%	79%	2,210,778	2,387,914
Canada	6%	8%	174,572	252,785
Germany	11%	6%	322,609	189,589
UK	5%	3%	157,813	81,252
Other International	5%	4%	143,847	115,860

First-Time/Repeat Visitors to Lee County

	2016	2017
First-time	30%b	24%
Repeat	68%	74%a

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2016	2017	% Change	2016	2017	% Change	2016	2017	% Change
Hotel/Motel/Resort/B&B	70.4%	72.1%	2.5%	$156.20	$157.96	1.1%	$109.89	$113.93	3.7%
Condo/Cottage/Vacation Home	66.9%	66.8%	0.0%	$209.08	$213.71	2.2%	$139.79	$142.84	2.2%
RV Park/Campground	55.7%	58.7%	5.4%	$56.84	$56.11	-1.3%	$31.65	$32.94	4.1%
AVERAGE	**66.0%**	**67.6%**	**2.4%**	**$146.47**	**$146.07**	**-0.3%**	**$96.67**	**$98.69**	**2.1%**

Visitor Profile Analysis
2017

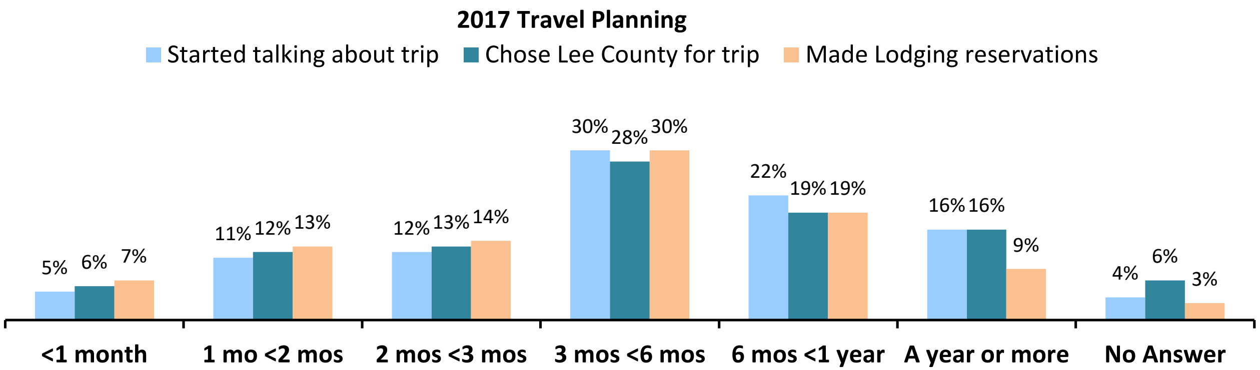
A total of 3,430 interviews were conducted with visitors in Lee County during the months of January – December 2017. A total sample of this size is considered accurate to plus or minus 1.6 percentage points at the 95% confidence level. ***Due to Hurricane Irma, visitor interviewing was not conducted during the month of September 2017, resulting in a slightly smaller sample size for 2017 than seen in prior years.***

A total of 3,747 interviews were conducted with visitors in Lee County during the months of January – December 2016. A total sample of this size is considered accurate to plus or minus 1.6 percentage points at the 95% confidence level.

Travel Planning

	Started Talking About Trip		Chose Lee County for Trip		Made Lodging Reservations*	
	2016	2017	2016	2017	2016	2017
	A	B	A	B	A	B
Total Respondents	**3747**	**3430**	**3747**	**3430**	**2184***	**2053***
Less than 3 months (NET)	26%	27%	29%	31%	32%	34%
<1 month	5%	5%	6%	6%	8%	7%
1 month - <2 months	9%	11%	10%	12%a	12%	13%
2 months - <3 months	13%	12%	13%	13%	12%	14%
3 months or more (NET)	70%	69%	64%	63%	60%	58%
3 months - <6 months	30%	30%	28%	28%	30%	30%
6 months - <1 year	24%	22%	21%b	19%	20%	19%
A year or more	16%	16%	15%	16%	10%	9%
No Lodging Reservations Made	N/A	N/A	N/A	N/A	5%	5%
No Answer	4%	4%	7%	6%	3%	3%

Q3a: When did you "start talking" about going on this trip?
Q3b: When did you choose Lee County for this trip?
Q3c: When did you make lodging reservations for this trip?



* Base: Among those staying in paid accommodations

Travel Planning

Devices Used to Access Destination Planning Information	2016	2017
	A	B
Total Respondents	**3747**	**3430**
Any (NET)	96%	97%
Smartphone (iPhone, Blackberry, etc.)	57%	59%a
Laptop computer	56%	56%
Tablet (iPad, etc.)	45%b	40%
Desktop computer	42%b	38%
E-Reader (Nook, Kindle, etc.)	3%	2%
Other portable device	1%	1%
None of these	3%	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	2016	2017
	A	B
Total Respondents who use devices for destination planning	**3616**	**3316**
Visited web sites (net)	87%	86%
Airline websites	42%	44%
Search Engines	29%	28%
Hotel websites	22%	24%
Vacation rental websites	27%b	23%
Trip Advisor	24%b	21%
Booking websites	23%	22%
www.FortMyers-Sanibel.com	9%	9%
Visit Florida	9%b	7%
Facebook	7%	8%
AAA	6%	6%
Other	10%	10%
None/Didn't visit websites	11%	13%
No Answer	2%	1%

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

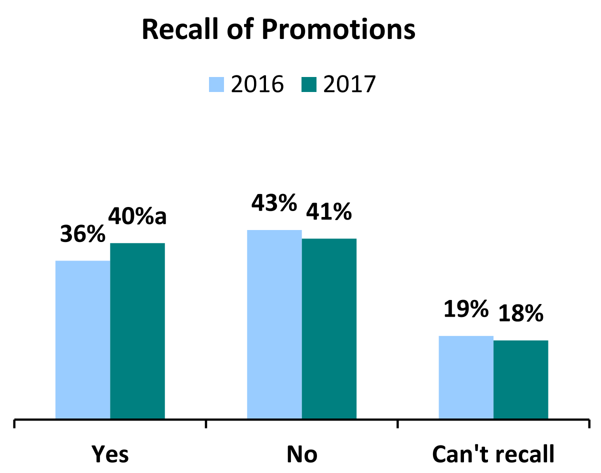
Travel Planning

Travel Information Requested	2016	2017
	A	B
Total Respondents	**3747**	**3430**
Requested information (NET)	27%	29%
Hotel Web Site	10%	13%a
Call hotel	6%	6%
VCB website	5%	5%
Visitor Guide	3%	3%
E-Newsletter	1%	1%
Call local Chamber of Commerce	1%	<1%
Call VCB	1%	<1%
Other	9%	8%
None/Did not request information	67%	66%
No Answer	6%	6%

(Please mark ALL that apply.)

Recall of Lee County Promotions	2016	2017
	A	B
Total Respondents	**3747**	**3430**
Yes	36%	40%a
No	43%	41%
Can't Recall	19%	18%

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



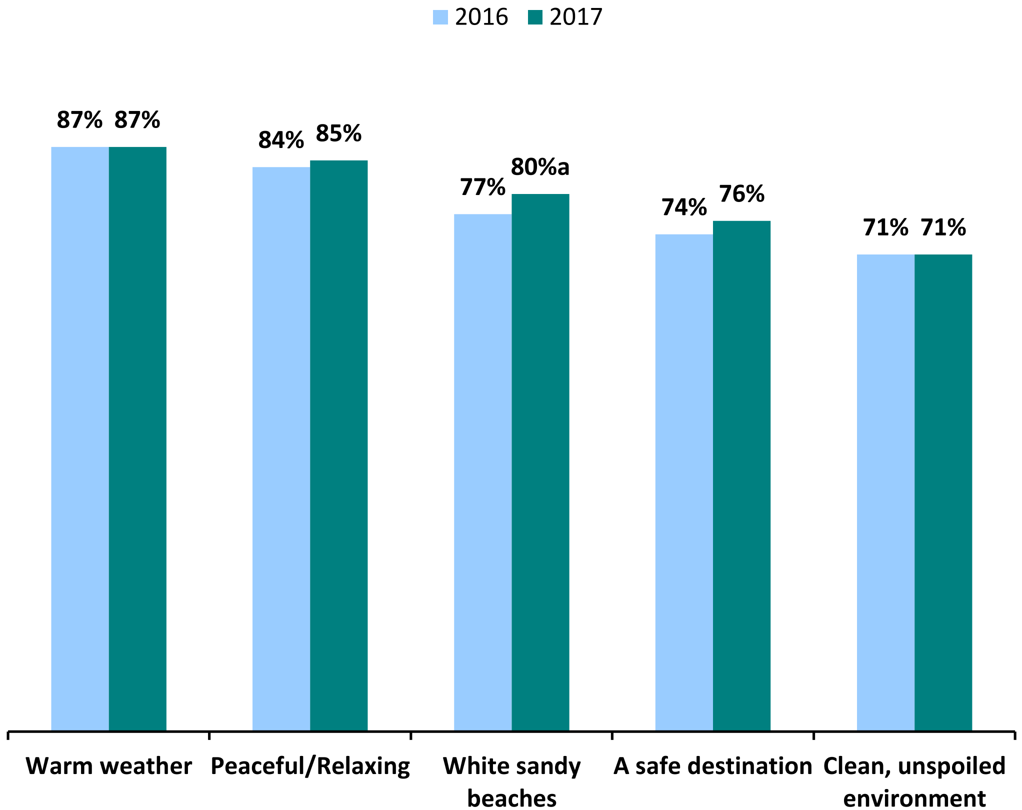
Travel Planning

Travel Decision Influences*		
	2016	2017
	A	B
Total Respondents	**3747**	**3430**
Warm weather	87%	87%
Peaceful/Relaxing	84%	85%
White sandy beaches	77%	80%a
A safe destination	74%	76%
Clean, unspoiled environment	71%	71%
Convenient location	68%	70%
Good value for the money	62%	63%
Plenty to see and do	62%	62%
Affordable dining	55%	56%
Reasonably priced lodging	53%	54%
A "family" atmosphere	52%	54%
Upscale accommodations	46%	46%

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)*

TopTravel Decisions Influences*



Trip Profile

Mode of Transportation	2016	2017
	A	B
Total Respondents	**3747**	**3430**
Fly	71%	76%a
Drive a personal vehicle	23%b	19%
Drive a rental vehicle	4%b	3%
Drive an RV	1%	1%
Other/No Answer (NET)	<1%	<1%

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

Frequency of Using SWFL Int'l (Past Year)	2016	2017
	A	B
Total Respondents	**3747**	**3430**
<u>One or more trips</u>	<u>59%</u>	<u>62%a</u>
1 trip	38%	39%
2 to 3 trips	16%	17%
4 to 5 trips	3%	4%a
6 or more trips	2%	3%
<u>None/No Answer</u>	<u>41%b</u>	<u>38%</u>

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

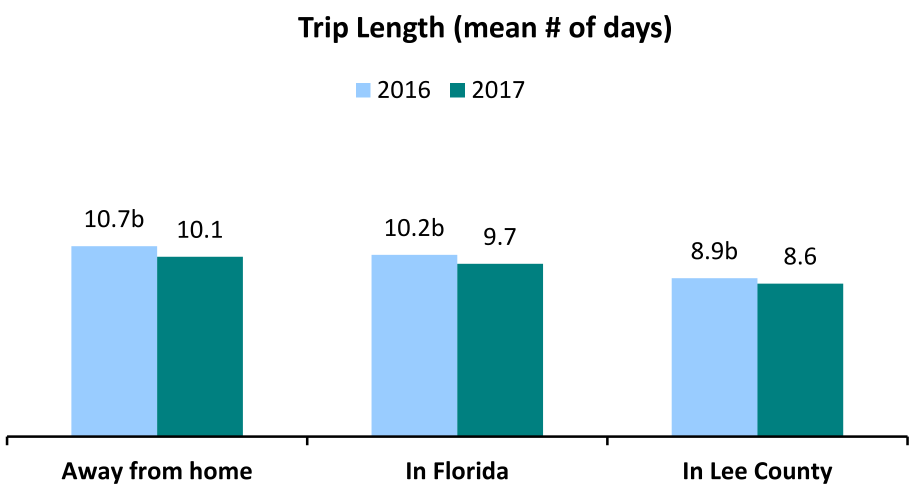
Airport Used	2016	2017
	A	B
Total Respondents Who Arrived by Air	**2675**	**2606**
SW Florida Int'l (Fort Myers)	81%	82%
Punta Gorda	7%	6%
Miami Int'l	3%	3%
Tampa Int'l	3%	2%
Ft. Lauderdale Int'l	3%	2%
Orlando Int'l	2%	2%
Other/No Answer (NET)	1%	2%a

Q2: At which Florida airport did you land?

Trip Profile

Trip Length Mean # of Days (excluding outliers)		
	2016	2017
	A	B
Total Respondents	**3747**	**3430**
Away from home	10.7b	10.1
In Florida	10.2b	9.7
In Lee County	8.9b	8.6

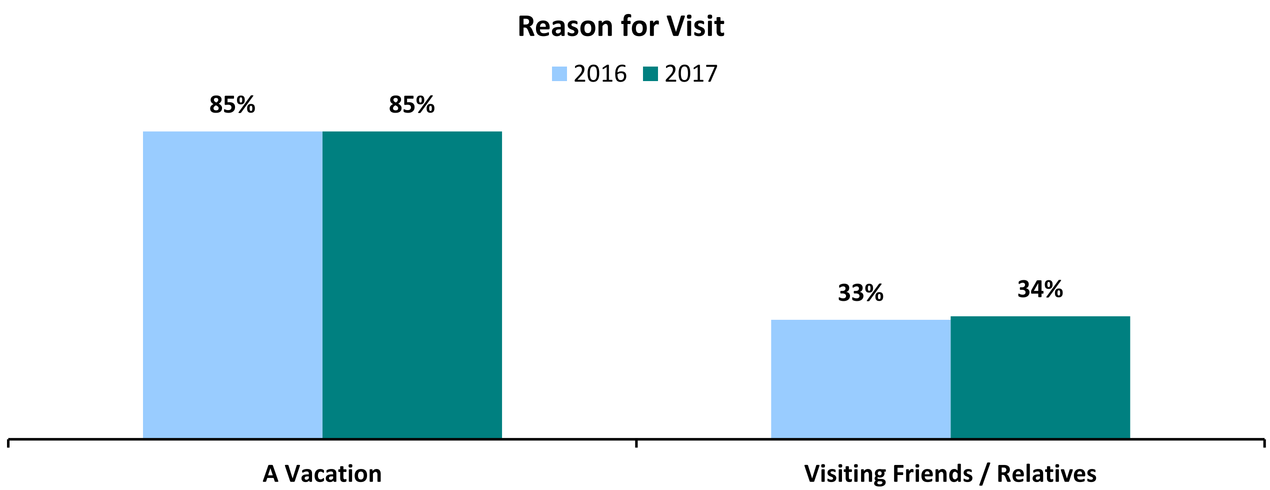
Q4a/b/c: On this trip, how many days will you be:



Trip Profile

Reason(s) for Visit		
	2016	2017
	A	B
Total Respondents	**3747**	**3430**
A Vacation	85%	85%
Visiting Friends / Relatives	33%	34%
Sporting Event(s)	3%	2%
Personal Business	3%b	2%
Other Business Trip	1%	1%
A Conference/Meeting	1%	1%
A Convention/Trade Show	<1%	<1%
Other/No Answer (NET)	2%	2%

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



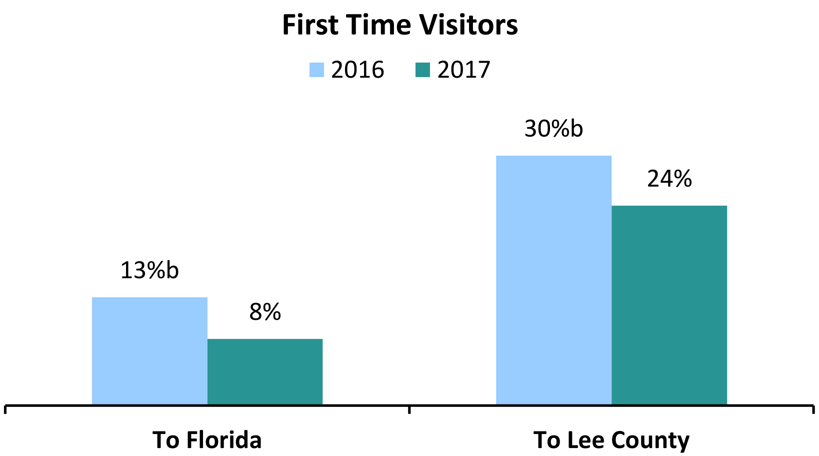
Trip Profile

First Time Visitors to Lee County	Total		Florida Residents		Out-of-State Residents		International Visitors	
	2016	2017	2016	2017	2016	2017	2016	2017
	A	B	A	B	A	B	A	B
Total Respondents	**3747**	**3430**	**146**	**112**	**2117**	**2022**	**870**	**626**
First-time visitor	30%b	24%	16%	12%	25%	21%	49%b	34%
Repeat visitor	68%	74%a	83%	85%	74%	78%	49%	63%a
No Answer	2%	2%	1%	4%a	1%	1%	3%	3%

Q15: Is this your first visit to Lee County?

First Time Visitors to Florida	2016	2017
Total Respondents	**3747**	**3430**
	A	B
Yes, first-time visitor	13%b	8%
No	81%	87%a
No answer	2%	2%
*FL Residents**	4%	3%

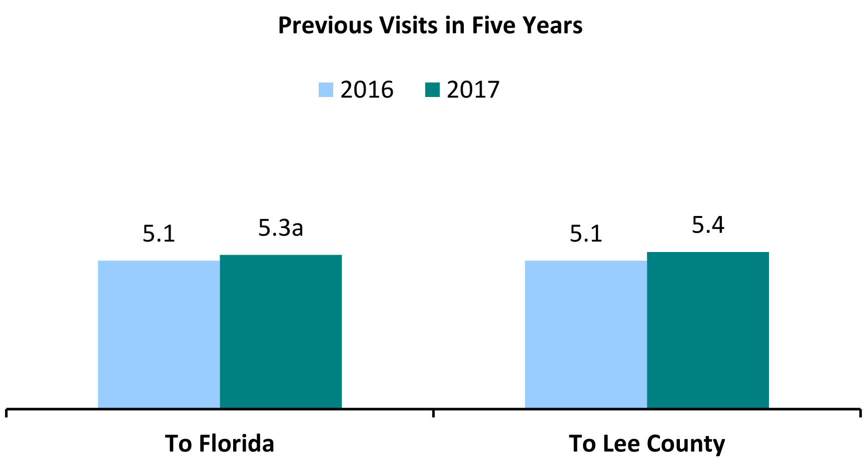
Q13: Is this your first visit to Florida?
**Florida residents are shown as a proportion of total visitor interviews conducted, though FL residents are not asked this question .*



Trip Profile

Previous Visits in Five Years				
	Mean # of Visits to Florida		Mean # of Visits to Lee County	
	2016	2017	2016	2017
	A	B	A	B
Base: Repeat Visitors	**3047 (FL res. Excl)**	**2970 (FL res. Excl)**	**2548**	**2540**
Number of visits	5.1	5.3a	5.1	5.4

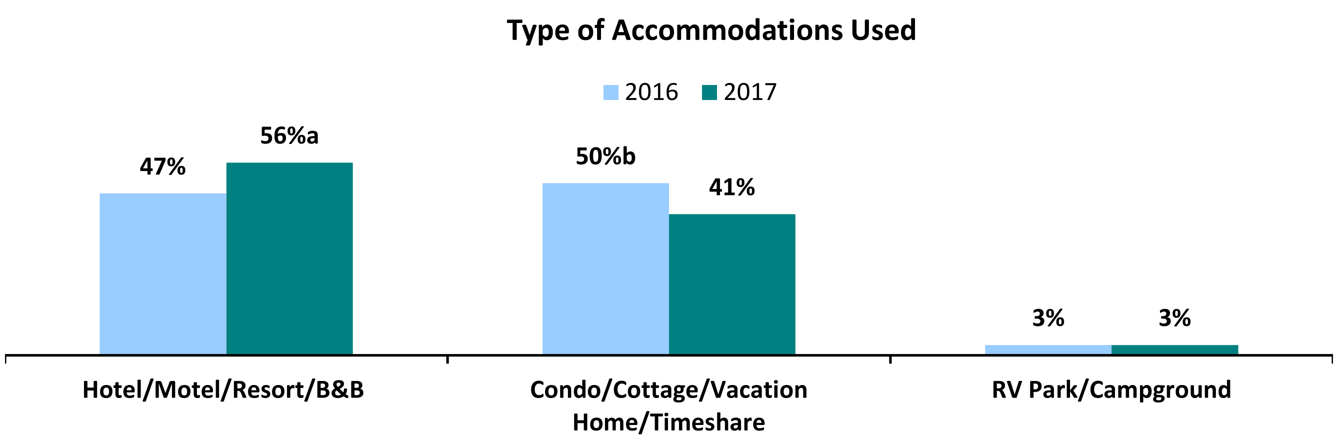
Q14: Over the past five (5) years, how many times have you visited Florida?
Q16: Over the past five (5) years, how many times have you visited Lee County?



Trip Profile

Type of Accommodations Used		
	2016	2017
	A	B
Total respondents staying in paid accommodations	**2184**	**2053**
Hotel/Motel/Resort/B&B (NET)	**47%**	**56%a**
At a hotel/motel/historic inn	29%	32%
At a resort	17%	23%
At a Bed and Breakfast	1%	<1%
Condo/Cottage/Vacation Home/Timeshare (NET)	**50%b**	**41%**
RV Park/Campground (NET)	**3%**	**3%**

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



Trip Profile

Quality of Accommodations		
	2016	2017
	A	B
Total respondents staying in paid accommodations	**2184**	**2053**
Far exceeded/Exceeded expectations	38%	38%
Met your expectations	54%	56%
Did not meet/Far below expectations	4%	3%
No Answer	4%	3%

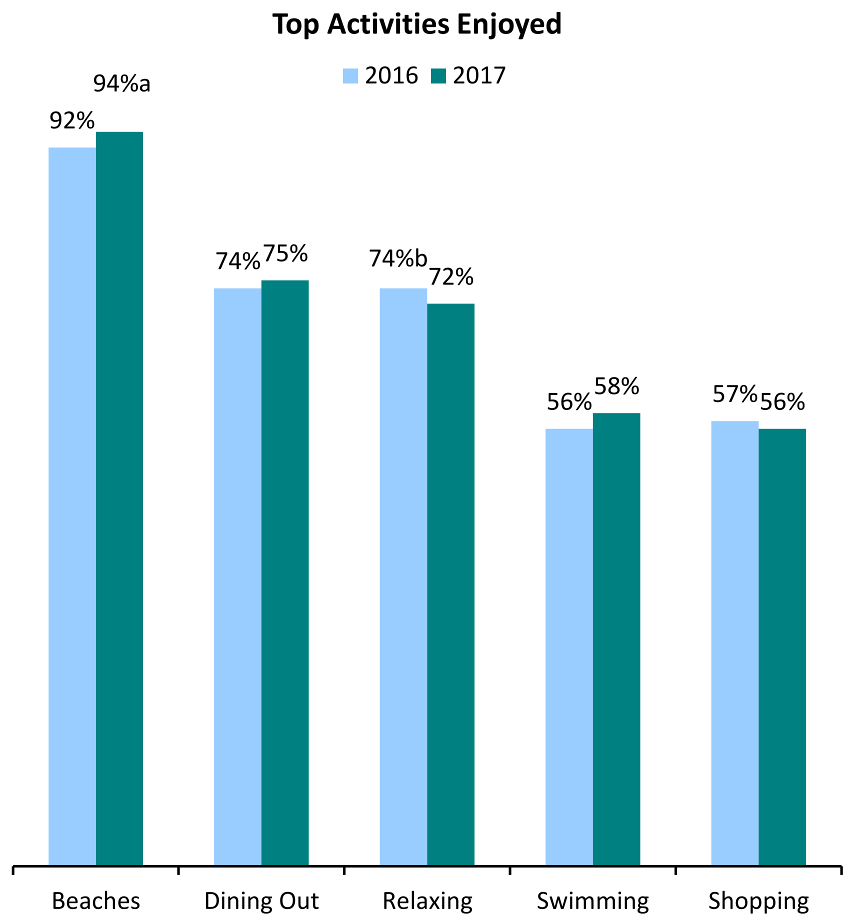
Q21: How would you describe the quality of your accommodations? Do you feel they:

Ratings by Subgroup								
	First-Timers		Repeaters		U.S. Residents		International Residents	
	2016	2017	2016	2017	2016	2017	2016	2017
	A	B	A	B	A	B	A	B
Total respondents staying in paid accommodations	**745**	**571**	**1402**	**1443**	**1583**	**1587**	**573**	**426**
Far exceeded/Exceeded expectations	35%	34%	40%	40%	42%	39%	29%	32%
Met your expectations	54%	57%	54%	56%	52%	55%	60%	61%
Did not meet/Far below expectations	4%	3%	4%b	2%	4%	3%	4%b	1%
No Answer	7%	6%	2%	2%	2%	2%	7%	6%

Trip Activities

Activities Enjoyed	2016	2017
	A	B
Total Respondents	**3747**	**3430**
Beaches	92%	94%a
Dining Out	74%	75%
Relaxing	74%b	72%
Swimming	56%	58%
Shopping	57%	56%
Visiting Friends/Relatives	35%	35%
Shelling	35%	35%
Sightseeing	38%b	32%
Watching Wildlife	26%	25%
Bicycle Riding	23%	21%
Attractions	20%b	18%
Photography	20%b	18%
Exercise / Working Out	22%b	17%
Golfing	15%	15%
Bars / Nightlife	14%	15%
Boating	12%	14%a
Birdwatching	16%b	13%
Fishing	11%	12%
Kayaking / Canoeing	8%	10%
Miniature Golf	10%b	8%
Sporting Event	5%	5%
Guided Tour	6%b	5%
Parasailing / Jet Skiing	5%	4%
Cultural Events	5%b	4%
Tennis	4%	3%
Scuba Diving / Snorkeling	2%	2%
Other	3%	3%
No Answer	1%	1%

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

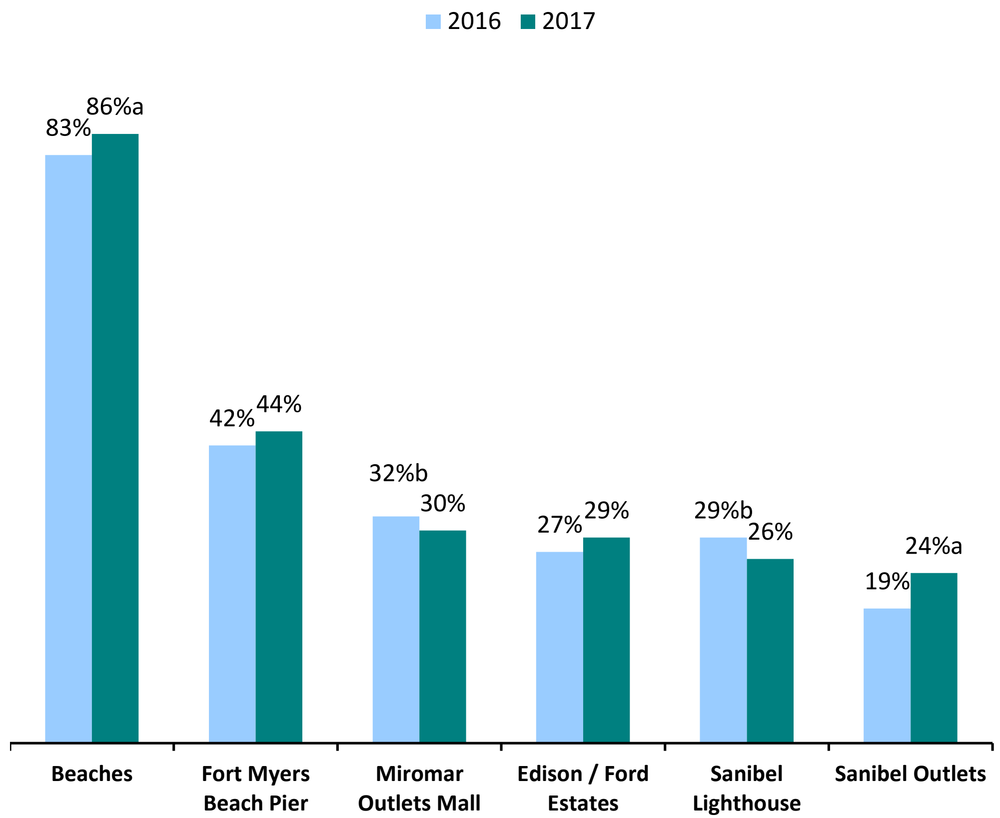


Trip Activities

Attractions Visited	2016	2017
	A	B
Total Respondents	**3747**	**3430**
Beaches	83%	86%a
Fort Myers Beach Pier	42%	44%
Miromar Outlets Mall	32%b	30%
Edison / Ford Estates	27%	29%
Sanibel Lighthouse	29%b	26%
Sanibel Outlets	19%	24%a
Ding Darling National Wildlife Refuge	14%	15%
Periwinkle Place	12%	12%
Bell Tower Shops	12%	11%
Coconut Point Mall	11%b	10%
Gulf Coast Town Center	10%b	9%
Shell Factory and Nature Park	11%b	9%
Edison Mall	8%	8%
Manatee Park	6%	5%
Bailey-Matthews Shell Museum	3%	4%
Broadway Palm Dinner Theater	2%	2%
Babcock Wilderness Adventures	1%	2%a
Barbara B. Mann Perfoming Arts Hall	2%	1%
Other	6%	5%
None/No Answer (NET)	6%b	5%

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

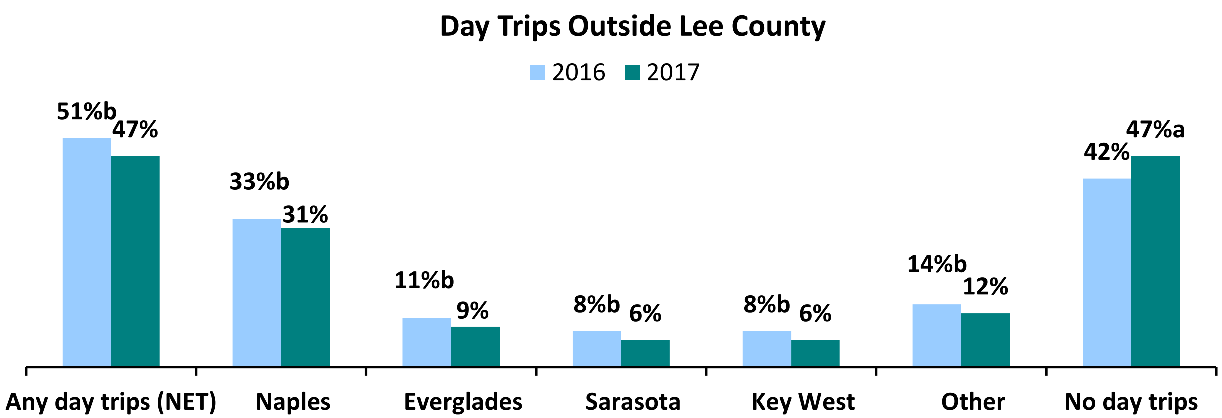
Top Attractions Visited



Trip Activities

Day Trips Outside Lee County		
	2016	2017
	A	B
Total Respondents	**3747**	**3430**
Any day trips (NET)	51%b	47%
Naples	33%b	31%
Everglades	11%b	9%
Sarasota	8%b	6%
Key West	8%b	6%
Other	14%b	12%
No day trips	42%	47%a
No Answer	15%	14%

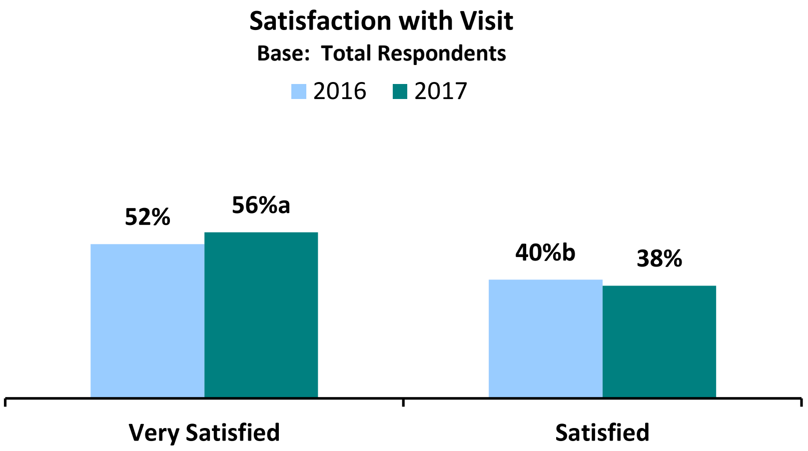
Q25: Where did you go on day trips outside Lee County?



Lee County Experience

Satisfaction with Visit	Total Respondents	
	2016	2017
	A	B
Total Respondents	**3747**	**3430**
Very Satisfied/Satisfied	93%	94%
Very Satisfied	52%	56%a
Satisfied	40%b	38%
Neither	2%	1%
Dissatisfied/Very Dissatisfied	1%	<1%
Don't know/No answer	5%	5%

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



Ratings by Subgroup	First-Timers		Repeaters		U.S. Residents		International Residents	
	2016	2017	2016	2017	2016	2017	2016	2017
	A	B	A	B	A	B	A	B
Total Respondents	**1123**	**826**	**2548**	**2540**	**2814**	**2738**	**870**	**626**
Very Satisfied/Satisfied	90%	91%	94%	95%	93%	94%	93%	93%
Very Satisfied	33%	39%a	62%	62%	57%	59%	40%	45%
Satisfied	57%b	52%	32%	33%	36%	35%	53%	48%

Future Plans

Likelihood to Recommend/Return to Lee County		
	2016	2017
	A	B
Total Respondents	**3743**	**3430**
Likely to Recommend Lee County	85%	88%a
Likely to Return to Lee County	88%	90%a
Base: Total Respondents Planning to Return	**3298**	**3093**
Likely to Return Next Year	59%	60%

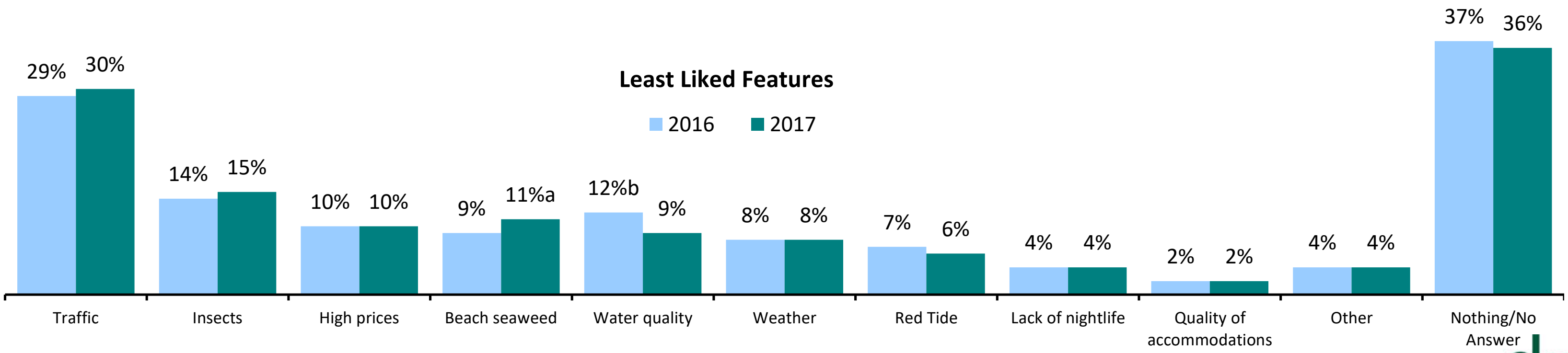
Q27: Would you recommend Lee County to a friend over other vacation areas in Florida?
Q31: Will you come back to Lee County?
Q32: Will you come back next year?

Ratings by Subgroup								
	First-Timers		Repeaters		U.S. Residents		International Residents	
	2016	2017	2016	2017	2016	2017	2016	2017
	A	B	A	B	B	B	A	B
Total Respondents	**1123**	**826**	**2548**	**2540**	**2814**	**2738**	**870**	**626**
Likely to Recommend Lee County	80%	82%	88%	90%a	86%	88%a	86%	91%a
Likely to Return to Lee County	76%	78%	93%	94%	89%	91%a	86%	88%
Base: Total Respondents Planning to Return	**855**	**647**	**2378**	**2389**	**2504**	**2492**	**747**	**551**
Likely to Return Next Year	35%b	30%	68%	68%	61%	62%	53%	53%

Lee County Experience

Least Liked Features		
	2016	2017
	A	B
Total Respondents	**3747**	**3430**
Traffic	29%	30%
Insects	14%	15%
High prices	10%	10%
Beach seaweed	9%	11%a
Water quality	12%b	9%
Weather	8%	8%
Red Tide	7%	6%
Lack of nightlife	4%	4%
Quality of accommodations	2%	2%
Other	4%	4%
Nothing/No Answer	37%	36%

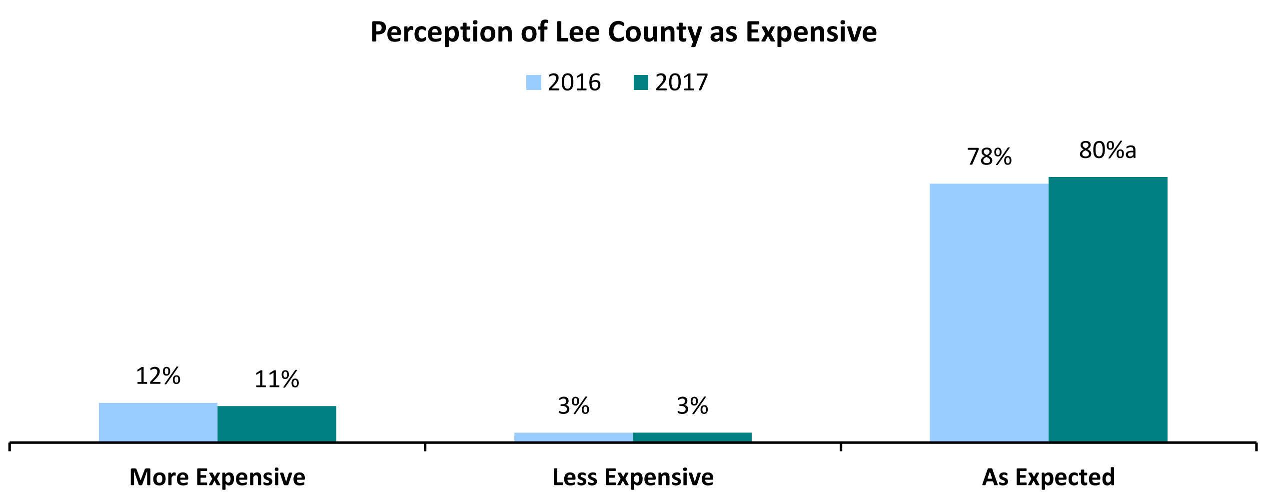
Q29: During this specific visit, which features have you liked **LEAST** about our area? (*Please mark ALL that apply.)*



Lee County Experience

Perception of Lee County as Expensive		
	2016	2017
	A	B
Total Respondents	**3747**	**3430**
More Expensive	12%	11%
Less Expensive	3%	3%
As Expected	78%	80%a
Don't know/No Answer (NET)	7%b	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		
	2016	2017
	A	B
Total Respondents	**3747**	**3430**
Age of respondent (mean)	52.2	51.9
Annual household income (mean)	$101,100	$102,400
Martial Status		
Married	74%	72%
Single	14%	13%
Vacations per year (mean)	3.1	3.3
Short getaways per year (mean)	3.8	3.7

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

Travel Party		
	2016	2017
	A	B
Total Respondents	**3747**	**3430**
Couple	41%	40%
Family	33%	34%
Single	8%	8%
Group of couples/friends	14%	13%
Mean travel party size	3.1	3.1
Mean adults in travel party	2.7	2.6

Q17: On this trip, are you traveling:
Q18: Including yourself, how many people are in your immediate travel party?

Travel Parties with Children		
	2016	2017
	A	B
Total Respondents	**3747**	**3430**
Traveling with any Children (net)	22%	23%
Any younger than 6	9%	10%
Any ages 6-11	10%	10%
Any 12-17 years old	12%	11%
No Children	78%	77%

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		
	2016	2017	2016	2017	% Change
Paid Accommodations	63%	63%	3,009,619	3,027,400	0.6%
Friends/Relatives	37%	37%	1,799,058	1,769,994	-1.6%
Total Visitation			**4,808,677**	**4,797,394**	**-0.2%**

Paid Accommodations Visitors

	%		Visitor Estimates		Direction of Change
Country of Origin	**2016**	**2017**	**2016**	**2017**	
United States	73%	79%	2,210,778	2,387,914	+
Canada	6%	8%	174,572	252,785	+
Germany	11%	6%	322,609	189,589	-
UK	5%	3%	157,813	81,252	-
Scandinavia	2%	1%	62,846	42,131	-
Switzerland	1%	1%	19,552	21,065	+
BeNeLux	1%	1%	18,155	19,561	+
Austria	<1%	<1%	2,793	10,533	+
France	1%	<1%	20,949	9,028	-
Latin America	<1%	<1%	8,379	4,514	-
Ireland	<1%	<1%	2,793	1,505	-
Other International	<1%	<1%	8,379	7,523	-

U.S. Region of Origin	2016	2017	2016	2017	Direction of Change
Florida	8%	7%	183,942	166,960	-
South (including Florida)	25%	24%	560,503	564,946	+
Midwest	46%	47%	1,022,094	1,120,184	+
Northeast	23%	25%	517,121	597,949	+
West	5%	4%	111,059	104,835	-

2017 Top DMAs (Paid Accommodations)

New York	5.9%	139,780	1
Boston (Manchester, NH)	5.7%	135,898	2
Chicago	5.6%	133,956	3
Minneapolis-Saint Paul	5.2%	124,249	4
Cleveland-Akron (Canton)	3.8%	91,246	5
Indianapolis	3.7%	87,363	6
Detroit	3.4%	81,539	7
Miami-Fort Lauderdale	2.8%	66,007	8
Saint Louis	2.7%	64,066	9
Columbus, OH	2.5%	60,183	10

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

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Occupancy Data Analysis
2017

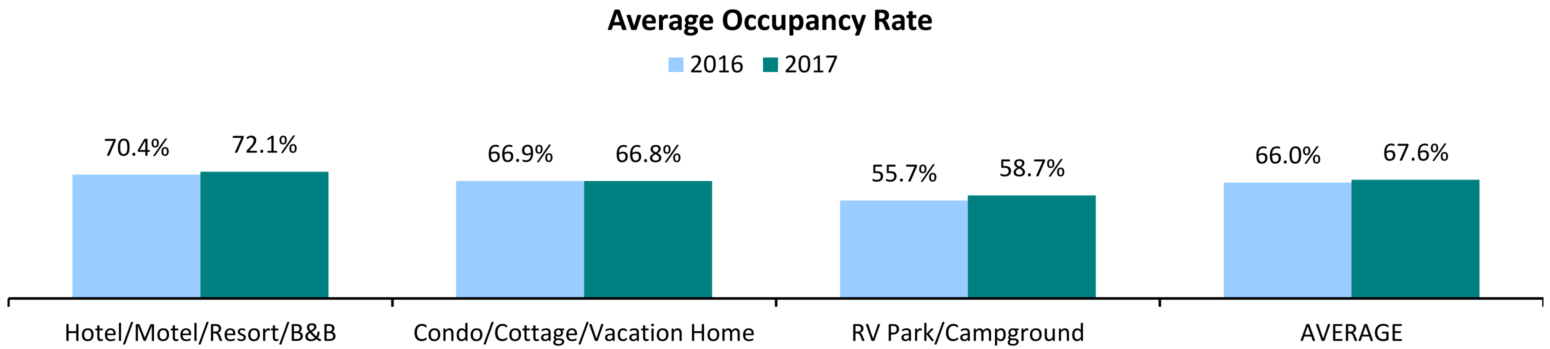
For each calendar year, property managers were contacted quarterly to provide data for the preceding three months according to the following schedule:

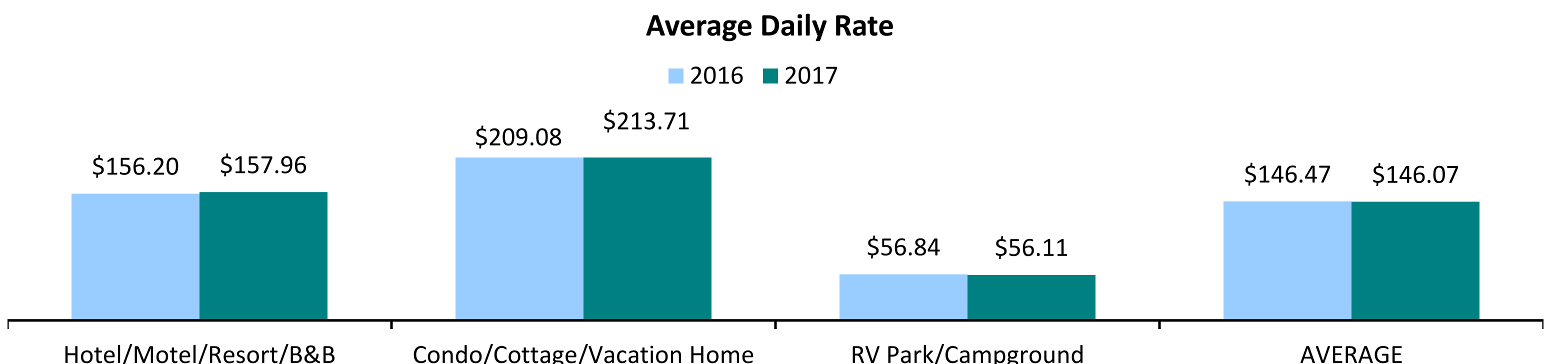
Quarter	Month 1	Month 2	Month 3	Data Collected in:	
1	January	February	March	April 2016	April 2017
2	April	May	June	July 2016	July 2017
3	July	August	September	October 2016	October 2017
4	October	November	December	January 2017	January 2018

Occupancy/Daily Rates

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2016	2017	% Change	2016	2017	% Change	2016	2017	% Change
Hotel/Motel/Resort/B&B	70.4%	72.1%	2.5%	$156.20	$157.96	1.1%	$109.89	$113.93	3.7%
Condo/Cottage/Vacation Home	66.9%	66.8%	0.0%	$209.08	$213.71	2.2%	$139.79	$142.84	2.2%
RV Park/Campground	55.7%	58.7%	5.4%	$56.84	$56.11	-1.3%	$31.65	$32.94	4.1%
AVERAGE	**66.0%**	**67.6%**	**2.4%**	**$146.47**	**$146.07**	**-0.3%**	**$96.67**	**$98.69**	**2.1%**

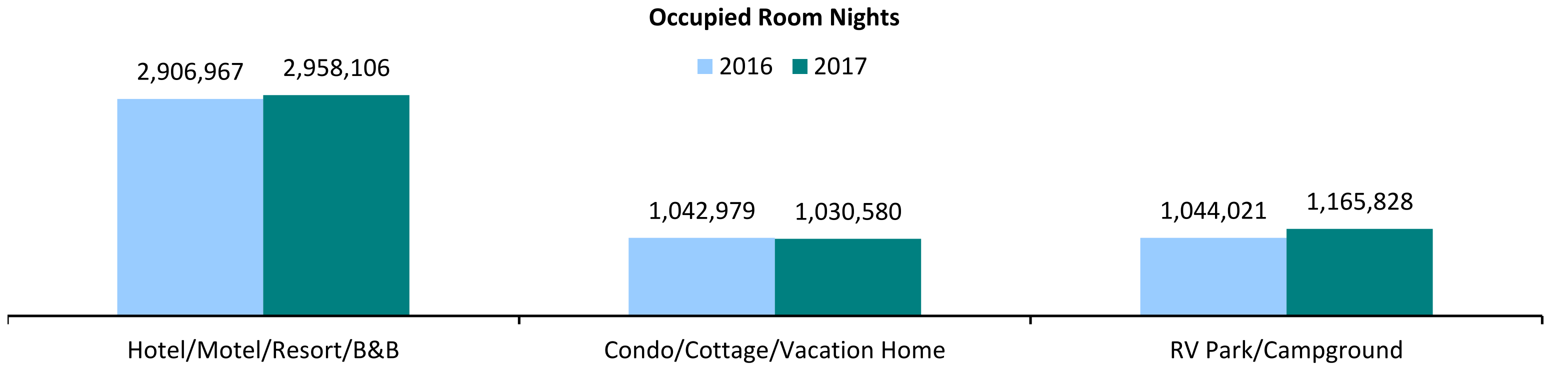
Q16: What was your average occupancy rate for each of these months [MONTH 1/MONTH 2/MONTH 3]?
Q17: What was your average daily rate (ADR) for each of these months [MONTH 1/MONTH 2/MONTH 3]?

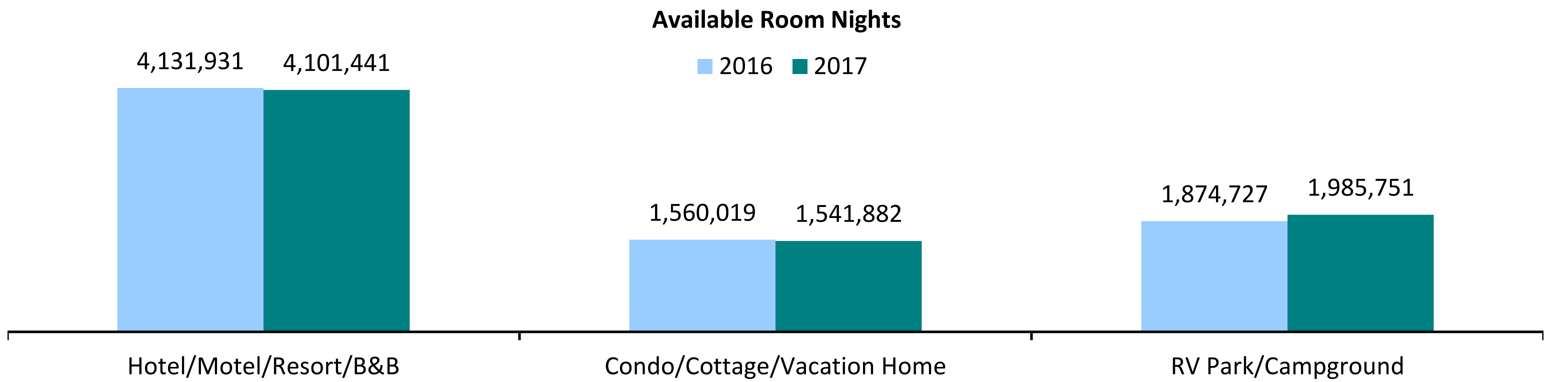




Room/Unit/Site Nights

	Occupied Room Nights			Available Room Nights		
	2016	**2017**	**% Change**	**2016**	**2017**	**% Change**
Hotel/Motel/Resort/B&B	2,906,967	2,958,106	1.8%	4,131,931	4,101,441	-0.7%
Condo/Cottage/Vacation Home	1,042,979	1,030,580	-1.2%	1,560,019	1,541,882	-1.2%
RV Park/Campground	1,044,021	1,165,828	11.7%	1,874,727	1,985,751	5.9%
Total	**4,993,967**	**5,154,514**	**3.2%**	**7,566,677**	**7,629,074**	**0.8%**



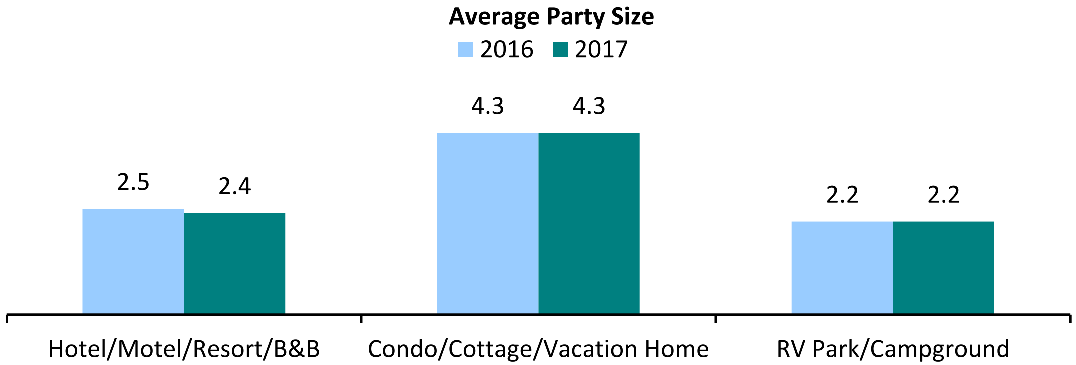


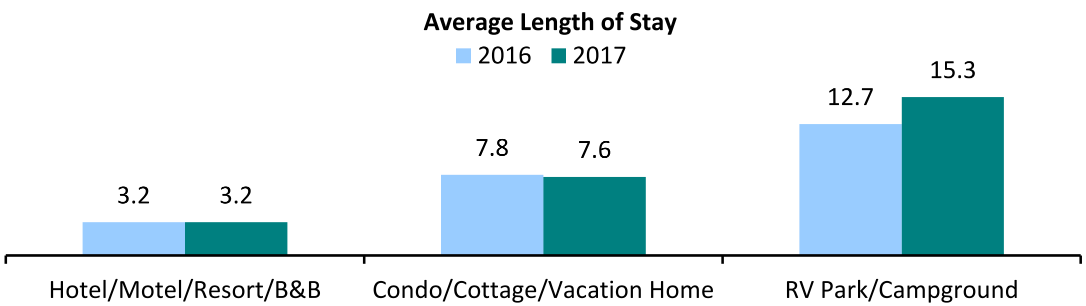
Average Party Size and Length of Stay

	Average Party Size			Average Length of Stay		
	2016	2017	% Change	2016	2017	% Change
Hotel/Motel/Resort/B&B	2.5	2.4	-1.9%	3.2	3.2	-1.2%
Condo/Cottage/Vacation Home	4.3	4.3	0.5%	7.8	7.6	-2.6%
RV Park/Campground	2.2	2.2	-2.1%	12.7	15.3	20.5%
Average	**2.8**	**2.8**	**-1.9%**	**4.7**	**4.7**	**0.7%**

Q18: What was your average number of guests per room/site/unit in each of these months [MONTH 1/MONTH 2/MONTH 3]?
Q19: What was the average length of stay (in nights) of your guests in each of these months [MONTH 1/MONTH 2/MONTH 3]?

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



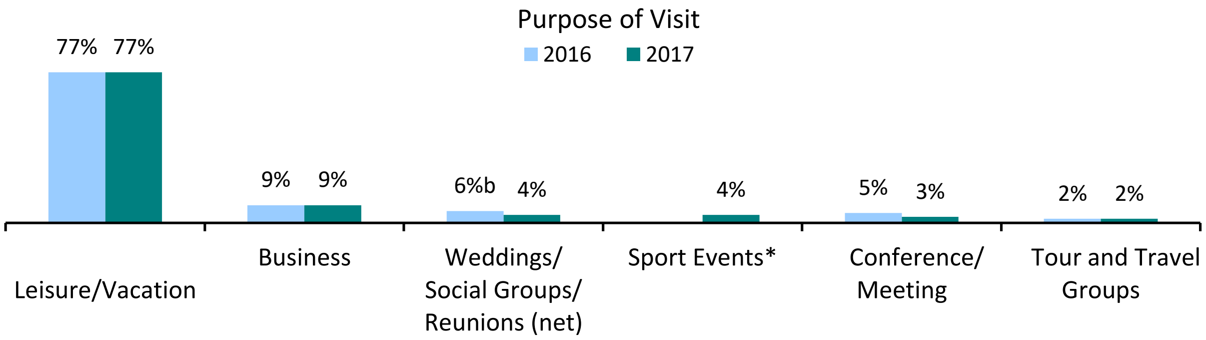


Lodging Management Estimates

Guest Profile		
	2016	2017
	A	B
Property Managers Responding	**440**	**403**
Purpose of Visit		
Leisure/Vacation	77%	77%
Business	9%	9%
Weddings/Social Groups/Reunions (net)	6%b	4%
Sport Events*	N/A*	4%
Conference/Meeting	5%b	3%
Tour and Travel Groups	2%	2%

Q22: What percent of your room/site/unit occupancy during the past three months ([MONTH 1 through MONTH 3]) do you estimate was generated by:

** "Sport events" was added to the questionnaire as a response option in the 2nd quarter of 2017, so there is no comparison with the prior year's data on this response.*



Economic Impact Analysis

2017

Total Visitor Expenditures by Spending Category

TOTAL EXPENDITURES			
	2016	2017	% Change
TOTAL	$3,035,179,670	$3,085,172,003	1.6%
Food and Beverages	$768,298,615	$777,713,327	1.2%
Shopping	$740,889,792	$747,350,463	0.9%
Lodging Accommodations	$731,463,837	$752,914,551	2.9%
Ground Transportation	$269,851,177	$267,688,944	-0.8%
Other	$524,676,249	$539,504,718	2.8%

(Note: Other includes the categories detailed below.)

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

Total Visitor Expenditures by Lodging Type

TOTAL EXPENDITURES						
	Staying in Paid Accommodations			Visiting Friends and Relatives/Day Trippers		
	2016	2017	% Change	2016	2017	% Change
TOTAL	$2,158,616,806	$2,222,342,586	3.0%	$876,562,864	$862,829,417	-1.6%
Lodging Accommodations	$731,463,837	$752,914,551	2.9%	$0	$0	--
Food and Beverages	$472,679,061	$487,533,125	3.1%	$295,619,554	$290,180,202	-1.8%
Shopping	$455,986,013	$468,035,700	2.6%	$284,903,779	$279,314,763	-2.0%
Ground Transportation	$178,508,040	$179,879,657	0.8%	$91,343,137	$87,809,287	-3.9%
Other	$319,979,855	$333,979,553	4.4%	$204,696,394	$205,525,165	0.4%

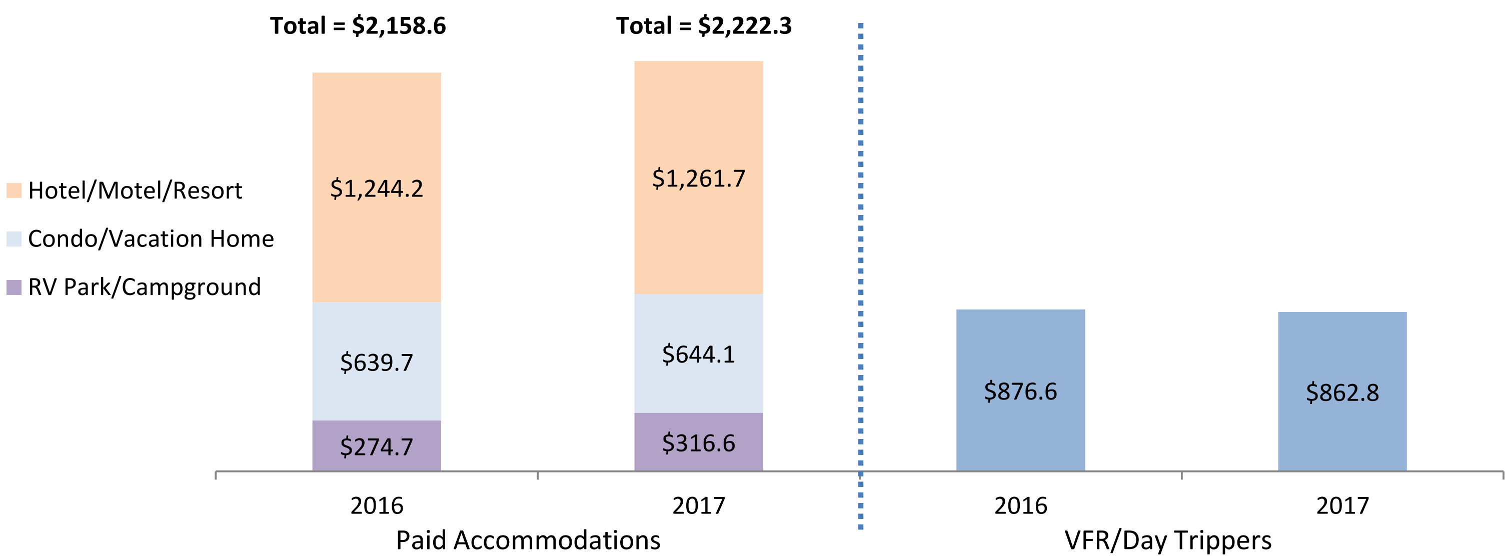
"Other " includes the following categories:

- Liquor Purchases
- Other Sightseeing/Attractions
- Historic/Cultural Site Admissions
- Popular Events Admissions
- Sports Fees
- Other Evening Entertainment
- Gaming
- Cultural Performance Admissions
- Licenses/Registrations/Permits
- Sweepstakes Tickets
- All Other

Total Visitor Expenditures by Lodging Type

Total Expenditures by Lodging Type					
	2016	2017	% Change	2016	2017
TOTAL	$3,035,179,670	$3,085,172,003	1.6%	100%	100%
Visiting Friends & Relatives/Day Trippers	$876,562,864	$862,829,417	-1.6%	29%	28%
Paid Accommodations	$2,158,616,806	$2,222,342,586	3.0%	71%	72%
Hotel/Motel/Resort/B&B	$1,244,192,681	$1,261,655,436	1.4%	41%	41%
Condo/Cottage/Vacation Home	$639,748,323	$644,113,940	0.7%	21%	21%
RV Park/Campground	$274,675,802	$316,573,210	15.3%	9%	10%

Expenditures by Lodging Type
(Millions)



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.

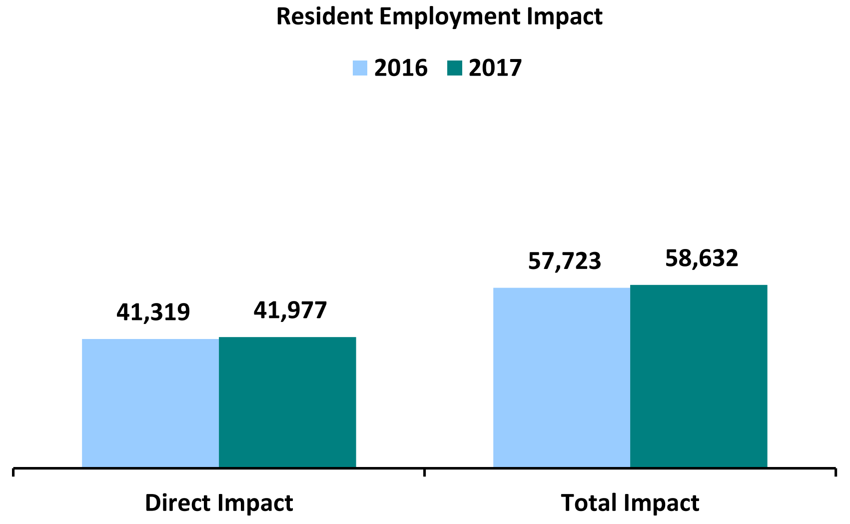
Impact on Jobs for Lee County Residents

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.).



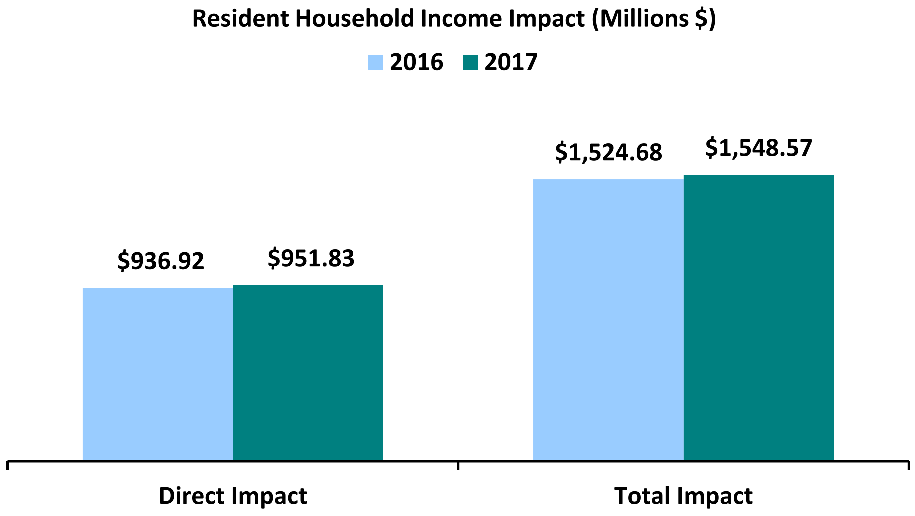
Impact on Household Income for Lee County Residents

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.

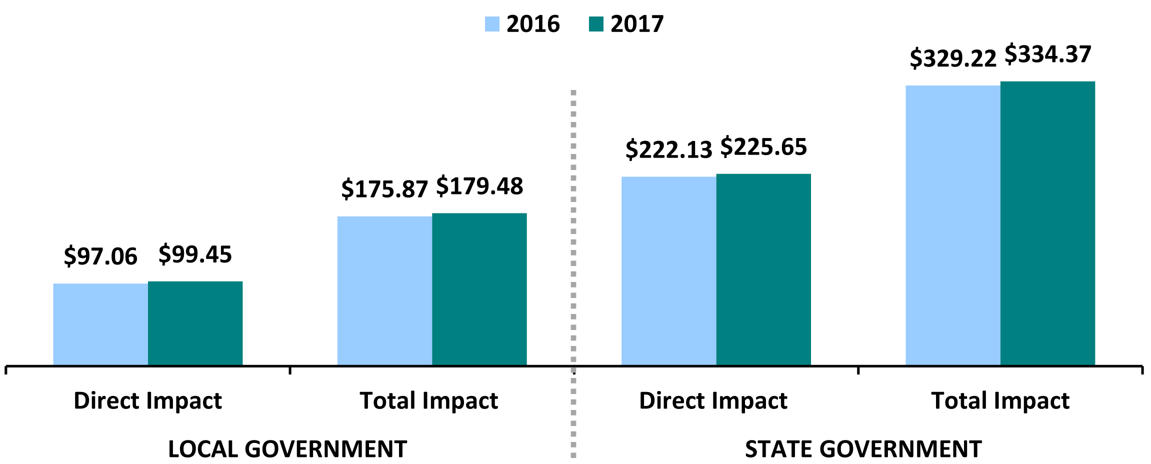
Local government revenue impact is a result of revenues provided to the local (Lee County) government. This includes the bed tax, local property tax, any local-option sales tax, and any operating income for local government agencies.

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).

State and Local Government Revenues Impact (Millions $)



Appendix
2017

2017 Interviewing Locations

City	Event/Location
Bonita Springs	Bonita Beach Park
Cape Coral	Cape Coral Yacht Club
Estero	Miromar Outlets
Fort Myers Beach	Bel-Air
Fort Myers Beach	Best Western PLUS Beach Resort
Fort Myers Beach	Cane Palm Beach Condos
Fort Myers Beach	Casa Playa
Fort Myers Beach	DiamondHead Resort
Fort Myers Beach	Estero Island Beach Club
Fort Myers Beach	Neptune Inn
Fort Myers Beach	The Pier
Fort Myers Beach	Times Square
Fort Myers Beach	Sunset Celebration
Fort Myers Beach	Windward Passage
Fort Myers	Hammond Stadium - Twins Game
Fort Myers	Jet Blue Park - Red Sox Game

City	Event/Location
Fort Myers	Centennial Park
Fort Myers	Edison-Ford Winter Estates
Fort Myers	RSW Airport
Sanibel	Casa Ybel
Sanibel	Coquina Beach Club
Sanibel	Holiday Inn Sanibel Island
Sanibel	Lighthouse Beach
Sanibel	Loggerhead Cay
Sanibel	Compass Point
Sanibel	Pelican Roost
Sanibel	Pointe Santo
Sanibel	Sanibel Arms West
Sanibel	Sanibel Inn
Sanibel	Sanibel Moorings
Sanibel	Sanibel Surfside
Sanibel	Song of the Sea
Sanibel	Tortuga Beach Resort

Seasonal Comparisons:
Key Statistics
2017

	Winter 2017		Direction of Change	Spring 2017		Direction of Change	Summer 2017		Direction of Change	Fall 2017		Direction of Change
Visitation												
Total Visitation		**1,323,241**	-		**1,329,449**	+		**1,005,778**	-		**1,138,926**	+
Paid Accommodations		728,209	+		853,367	+		659,272	-		786,552	+
Visiting Friends/Relatives		595,032	-		476,082	-		346,506	+		352,374	-
Visitor Origin by Country												
United States	82%	599,175	+	79%	677,585	+	80%	524,839	+	74%	582,292	+
Canada	12%	88,152	+	7%	63,101	+	2%	14,732	-	9%	74,692	+
Germany	2%	17,886	-	7%	61,599	-	9%	58,929	-	8%	59,449	-
United Kingdom	2%	12,776	-	2%	19,531	-	2%	14,732	-	4%	35,059	+
Other International	1%	10,220	-	4%	31,551	+	7%	46,039	+	4%	35,059	-
Visitor Origin by US Region												
Midwest	52%	312,006	-	46%	309,871	+	37%	194,737	+	48%	278,488	+
Northeast	30%	180,063	+	25%	171,462	+	17%	90,244	-	24%	140,218	+
South (incl. Florida)	13%	79,166	-	25%	167,331	+	42%	218,485	+	22%	130,480	+
West	4%	23,284	+	4%	28,921	-	4%	21,374	-	6%	33,107	-
In-State Visitors	**1%**	**4,657**	**-**	**8%**	53,711	**+**	**19%**	102,118	**+**	**5%**	27,265	**+**
Total Visitor Expenditures		**$1,147,333,009**	-		**$728,035,018**	**+**		**$502,483,234**	**-**		**$707,320,742**	**+**
Paid Accommodations		$851,964,885	-		$500,090,495	+		$343,461,668	-		$526,825,538	+
Visiting Friends/Relatives		$295,368,124	-		$227,944,523	-		$159,021,566	-		$180,495,204	+

Visitor Profile Survey	Winter 2017	Spring 2017	Summer 2017*	Fall 2017
# of Interviews Completed	947	940	598	945
Percentage Flying to Lee County	72%	78%	69%	82%
First-time Visitors	25%	27%	29%	17%
Repeat Visitors	73%	70%	70%	81%
Average Length of Stay	6.3	8.2	7.9	8.9
Satisfaction with Visit				
Very Satisfied/Satisfied	94%	93%	94%	93%
Very Satisfied	54%	56%	53%	59%
Satisfied	40%	37%	41%	34%
Likely to Recommend	88%	90%	87%	86%
Likely to Return	91%	90%	89%	90%
Average Age	55.7	50.1	47.9	52.5
Average Household Income	$99,859	$102,797	$102,210	$104,700
Married	74%	72%	68%	74%
Traveling as a couple	48%	37%	29%	43%
Traveling as a family	21%	40%	49%	33%
Traveling with children	13%	28%	36%	20%
Average Travel Party Size	2.7	3.3	3.5	3.1

**Due to Hurricane Irma, visitor interviewing was not conducted during the month of September 2017, resulting in a slightly smaller sample size for the Summer 2017 season than for the remaining seasons in 2017.*

Occupancy Survey	Winter 2017	YOY % Change	Spring 2017	YOY % Change	Summer 2017	YOY % Change	Fall 2017	YOY % Change
Available Roomnights								
Hotel/Motel/Resort/B&B	1,019,622	-1.6%	1,016,476	-1.2%	1,015,455	-0.9%	1,049,888	0.8%
Condo/Cottage/Vacation Home	385,433	-0.1%	384,495	-2.9%	361,801	-8.1%	410,153	6.7%
RV Park/Campground	514,890	17.4%	497,937	10.9%	440,521	-10.6%	532,403	7.8%
Total	**1,919,945**	**3.2%**	**1,898,908**	**1.4%**	**1,817,777**	**-4.9%**	**1,992,444**	**3.7%**
Occupied Roomnights								
Hotel/Motel/Resort/B&B	839,786	-3.8%	713,185	-0.3%	630,761	-1.4%	774,374	14.0%
Condo/Cottage/Vacation Home	349,570	1.1%	275,002	0.0%	167,294	-14.1%	238,714	4.9%
RV Park/Campground	489,292	17.1%	183,298	14.3%	135,022	-8.2%	358,216	12.4%
Total	**1,678,648**	**2.6%**	**1,171,485**	**1.8%**	**933,077**	**-4.9%**	**1,371,304**	**11.9%**
Occupancy Rates								
Hotel/Motel/Resort/B&B	82.4%	-2.2%	70.2%	1.0%	62.1%	-0.5%	73.8%	13.1%
Condo/Cottage/Vacation Home	90.7%	1.1%	71.5%	3.0%	46.2%	-6.5%	58.2%	-1.6%
RV Park/Campground	95.0%	-0.2%	36.8%	3.1%	30.7%	3.0%	67.3%	4.3%
Average	**87.4%**	**-0.6%**	**61.7%**	**0.5%**	**51.3%**	**0.0%**	**68.8%**	**7.8%**
Average Daily Rates								
Hotel/Motel/Resort/B&B	$203.55	-1.8%	$155.03	5.0%	$123.55	1.7%	$139.24	5.2%
Condo/Cottage/Vacation Home	$264.02	-1.6%	$204.71	10.0%	$176.92	8.6%	$176.19	-5.4%
RV Park/Campground	$66.17	-1.3%	$46.64	4.6%	$41.78	-0.9%	$52.61	-6.8%
Average	**$176.10**	**-4.5%**	**$149.73**	**5.1%**	**$121.28**	**2.9%**	**$123.04**	**0.3%**
RevPAR								
Hotel/Motel/Resort/B7B	$167.65	-3.9%	$108.77	6.0%	$76.74	1.2%	$102.70	19.0%
Condo/Cottage/Vacation Home	$239.45	-0.5%	$146.41	13.3%	$81.80	1.6%	$102.55	-7.0%
RV Park/Campground	$62.88	-1.5%	$17.17	7.8%	$12.81	1.8%	$35.40	-2.8%
Average	**$153.97**	**-5.0%**	**$92.37**	**5.6%**	**$62.26**	**2.9%**	**$84.68**	**8.2%**

Occupancy Barometer	Winter 2017	Spring 2017	Summer 2017	Fall 2017
Purpose of Visit				
Leisure/Vacation	83%	78%	77%	72%
Business	5%	9%	8%	15%
Weddings/Social groups/Reunions (net)	4%	5%	4%	4%
Conference/meeting	2%	3%	4%	4%
Tour and Travel Groups	3%	2%	2%	2%
Sport Events	N/A*	3%	5%	3%
Level of Reservations for Next Three Months vs. Last Year				
Up/Same (Net)	57%	56%	63%	80%
Up	30%	23%	22%	44%
Same	26%	33%	41%	37%
Down	34%	36%	32%	15%

** "Sport events" was added to the questionnaire as a response option during the Spring season of 2017, so there is no Winter season data on this response.*