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

Fall 2017 Visitor Profile and Occupancy Analysis

February 8, 2018

Prepared for:

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

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providing direction in travel & tourism

Executive Summary
Fall 2017

A Note About "Statistical Significance"

(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 statistically significant.

A difference is said to be statistically significant (at the 95% confidence level) if the probability of the difference occurring purely by chance 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

Visitation Estimates

- During the fall of 2017, Lee County hosted just under 787,000 visitors staying in paid accommodations – an increase from last fall (+5.5%). An additional 352,000 visitors stayed with friends or relatives, for a total of 1.1 million visitors.
- While fall 2017 visitation among paid accommodations guests increased year-over-year, visitation among those staying with friends or relatives dropped slightly (-2.8%). As a result, total visitation increased slightly versus fall 2016.

Estimated Visitation	Fall 2016	Fall 2017	% Change
Paid Accommodations	745,398	786,552	5.5%
Friends/Relatives	362,598	352,374	-2.8%
Total Visitation	**1,107,996**	**1,138,926**	**2.8%**

Visitor Expenditures

- Fall 2017 visitors spent an estimated $707 million during their stay in Lee County, an increase from last fall (+7.9%).
- Expenditures among fall 2017 paid accommodations guests amounted to $526.8 million (74% of the total), representing an increase of 10.4% year-over-year. Those staying with friends or relatives contributed the remaining $180 million.

Estimated Expenditures	Fall 2016	Fall 2017	% Change
Paid Accommodations	$477,059,099	$526,825,538	10.4%
Friends/Relatives	$178,474,297	$180,495,204	1.1%
Total Expenditures	**$655,533,396**	**$707,320,742**	**7.9%**

Note: Fall season refers to the period including October, November, and December when referenced throughout this report.

Visitor Origin

- Three-fours of fall 2017 visitors staying in paid accommodations reside within the United States (74% vs. 70% in 2016). The majority of international visitors staying in paid accommodations come from Canada (9%), followed by Germany (8%), and the UK (4%).

- Half of domestic paid accommodations visitors came from the Midwest (48%). One-fourth arrived from the Northeast (24%), slightly fewer from the South (22%), and a small minority from the West (6%).

- During fall 2017, the Lee County lodging industry drew the largest proportion of its domestic visitors from the Detroit, Boston, Minneapolis, Cleveland, and New York DMAs.

Fall 2017 Top DMAs (Paid Accommodations)

DMA	%	Visitor Estimate
Detroit	6%	33,107
Boston (Manchester, NH)	5%	31,159
Minneapolis-Saint Paul	5%	29,212
Cleveland-Akron (Canton)	5%	29,212
New York	5%	29,212
Chicago	4%	21,422
Indianapolis	3%	19,475
Atlanta	3%	19,475

Visitors Staying in Paid Accommodations

	%		Visitor Estimates		Direction of Change
Fall Season	2016	2017	2016	2017	
Country of Origin					
United States	70%	74%	520,401	582,292	+
Canada	7%	9%	55,101	74,692	+
Germany	11%	8%	82,652	59,449	-
UK	4%	4%	30,612	35,059	+
Scandinavia	4%	2%	29,081	13,719	-
Switzerland	1%	1%	4,592	7,622	+
BeNeLux	1%	1%	4,592	4,573	-
France	1%	<1%	6,122	3,049	-
Austria	<1%	<1%	3,061	3,049	-
Latin America	1%	<1%	4,592	1,524	-
Ireland	-	<1%	-	1,524	+
Other International	1%	-	4,592	-	-

Visitors Staying in Paid Accommodations

	%		Visitor Estimates		Direction of Change
Fall Season	2016	2017	2016	2017	
U.S. Region of Origin					
Florida	5%	5%	24,075	27,265	+
South (including Florida)	24%	22%	124,081	130,480	+
Midwest	48%	48%	251,867	278,488	+
Northeast	21%	24%	109,266	140,218	+
West	7%	6%	35,187	33,107	-

Note: The percentage of visitors by origin market is based on data collected from visitors in the Visitor Profile Survey. Respondents who did not answer the area of residence questions are excluded when calculating the 2017 percentages.

Trip Planning

- Fall 2017 visitors planned their Lee County trip well ahead of their arrival. Seven in ten visitors started talking about their Lee County trip *three months or more* in advance, and two-thirds chose the destination within that timeframe. Among those staying in paid accommodations, well over half made their lodging reservations within that window as well.
    - 70% started talking about trip (vs. 66% in 2016)
    - 64% chose Lee County for trip (vs. 60% in 2016)
    - 62% made lodging reservation (vs. 58% in 2016)

- Almost nine out of ten fall visitors claim to have visited one or more websites when planning their trip to Lee County (86%). Visitors most often mention using *airline websites* (46%), followed by *search engines* (26%), *hotel websites* (23%), *booking websites* (20%), *vacation rental websites* (19%), or *Trip Advisor* (19%).

- More than half of fall 2017 visitors report that they typically access destination planning information online via a smartphone (60%) or laptop (55%). Somewhat fewer mention using a tablet (38%) or desktop computer (37%).

- The characteristics most likely to influence the decision to visit Lee County in fall 2017 included:
    - *Warm weather (89%);*
    - *Peaceful/relaxing (84%);*
    - *White sandy beaches (79%);*
    - *A safe destination (75%);*
    - *Clean, unspoiled environment (69%); and*
    - *Convenient location (69%).*

Visitor Profile

- Eight in ten visitors flew to Lee County (82% vs. 74% in 2016), and most of those flyers arrived at Southwest Florida International Airport (79%).

- On average, fall 2017 visitors stayed in Lee County for about 9 days. The majority reported they came to Lee County for a vacation (85%). Eight in ten were repeat visitors (81% vs.71% in 2016) who averaged six trips to Lee County in the past five years.

Visitor Profile (cont'd)

- Six in ten fall 2017 paid accommodation guests said they were staying in hotel/motel/resort/B&B properties (57%), with four in ten staying in condo/vacation home properties (39%), and fewer in RV parks/campgrounds (4%). Nearly all reported that the quality of their lodging either *met their expectations* (58%) or *far exceeded/exceeded their expectations* (37%).

- During their trip, fall visitors enjoyed various activities in Lee County, most commonly: *beaches* (92%), *dining out* (74%), *relaxing* (72%), *shopping* (56%) and *swimming* (53%). Half of fall visitors took a day trip outside of Lee County (50%) while visiting the area, with many venturing to Naples (35%).

- Visitors continued to be highly satisfied with their stay in Lee County. Almost all fall 2017 visitors indicated they were either *very satisfied* (59%) or *satisfied* (34%) with their visit.

- Nine in ten fall visitors indicated they will recommend Lee County to a friend over other areas in Florida (86%). Just as many intend to return to Lee County themselves (90%), with almost two-thirds planning to come back next year (65%).

- When asked what they liked least about the area, one-fourth of visitors cited *traffic* as a negative aspect of their trip (26%), followed by: *insects* (16%), *water quality* (14%), *red tide* (11%), and *high prices* (9%).

- The demographic composition of Fall 2017 visitors can be summarized as follows:
  - 53 years of age on average
  - $104,700 household income on average
  - 74% married
  - 43% traveling as a couple
  - 33% traveling as a family
  - 80% traveling *without* children
  - 3 people in travel party on average

Lodging Industry Assessments

- For the Lee County lodging industry in total, *available* room nights saw an increase of 3.7% from fall 2016 to 2017, and *occupied* room nights rose 11.9%. All categories saw an increase in *available* room nights, with RV park/campground seeing the largest increase (+7.8%). Furthermore, all categories experienced growth in *occupied* room nights, with hotel/motel/resorts and RV park/campgrounds encountering a significant increase (+14.0% and 12.4% respectively).

Fall Season	Occupied Room Nights			Available Room Nights		
	2016	2017	% Change	2016	2017	% Change
Hotel/Motel/Resort/B&B	679,474	774,374	14.0%	1,042,070	1,049,888	0.8%
Condo/Cottage/Vacation Home	227,546	238,714	4.9%	384,569	410,153	6.7%
RV Park/Campground	318,773	358,216	12.4%	493,994	532,403	7.8%
Total	**1,225,793**	**1,371,304**	**11.9%**	**1,920,633**	**1,992,444**	**3.7%**

- As a result, the industry-wide average occupancy rate in Lee County for the fall season increased 7.8% year-over-year. When compared with last fall, hotels/motels/resorts and RV parks/campground experienced an increase in average occupancy rate (+13.2% and +4.3%, respectively), while condos/vacation homes experienced a slight decrease (-1.6%).
- Lee County's average daily rate for the fall season saw no notable change year-over-year. Condos/vacation homes and RV parks/campgrounds experienced decreases (-5.4% and -6.8%), while hotels/motels/resorts experienced modest gains in ADR when compared with last year (+5.2%)
- Consequently, the overall increase in both average occupancy rate and ADR translated to 8.2% growth in RevPAR from fall 2016 to 2017.

Fall Season	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2016	2017	% Change	2016	2017	% Change	2016	2017	% Change
Hotel/Motel/Resort/B&B	65.2%	73.8%	13.1%	$132.35	$139.24	5.2%	$86.30	$102.70	19.0%
Condo/Cottage/Vacation Home	59.2%	58.2%	-1.6%	$186.28	$176.19	-5.4%	$110.22	$102.55	-7.0%
RV Park/Campground	64.5%	67.3%	4.3%	$56.43	$52.61	-6.8%	$36.42	$35.40	-2.8%
OVERALL	**63.8%**	**68.8%**	**7.8%**	**$122.62**	**$123.04**	**0.3%**	**$78.26**	**$84.68**	**8.2%**

Lodging Industry Assessments (cont'd)

- According to reports from Lee County property managers, reservations as of mid-January for the 2018 winter season (January, February, and March) suggest that business will be significantly stronger then last winter. Eight in ten managers responding in January noted that their total level of reservations for the winter season are either *up* (44% vs. 15% last winter) or the *same* (37%) as last year. Only 15% (vs. 46% last winter) claim that their reservations are *down*.

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Fall 2017 Lee County Snapshot

Total Visitation

	%		Visitor Estimates	
Fall Season	**2016**	**2017**	**2016**	**2017**
Paid Accommodations	67%	69%	745,398	786,552
Friends/Relatives	33%	31%	362,598	352,374
Total Visitation			**1,107,996**	**1,138,926**

Total Visitor Expenditures

Fall Season	2016	2017	% Change
Total Visitor Expenditures	$655,533,396	$707,320,742	7.9%
Paid Accommodations	$477,059,099	$526,825,538	10.4%

Visitor Origin - Visitors Staying in Paid Accommodations

	%		Visitor Estimates	
Fall Season	**2016**	**2017**	**2016**	**2017**
Florida	5%	5%	24,075	27,265
United States	70%	74%	520,401	582,292
Canada	7%	9%	55,101	74,692
Germany	11%	8%	82,652	59,449
UK	4%	4%	30,612	35,059
Other International	8%	4%	56,632	35,059

First-Time/Repeat Visitors to Lee County

Fall Season	2016	2017
First-time	27%	17%
Repeat	71%	81%

Fall Season	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2016	**2017**	**% Change**	**2016**	**2017**	**% Change**	**2016**	**2017**	**% Change**
Hotel/Motel/Resort/B&B	65.2%	73.8%	13.1%	$132.35	$139.24	5.2%	$86.30	$102.70	19.0%
Condo/Cottage/Vacation Home	59.2%	58.2%	-1.6%	$186.28	$176.19	-5.4%	$110.22	$102.55	-7.0%
RV Park/Campground	64.5%	67.3%	4.3%	$56.43	$52.61	-6.8%	$36.42	$35.40	-2.8%
OVERALL	**63.8%**	**68.8%**	**7.8%**	**$122.62**	**$123.04**	**0.3%**	**$78.26**	**$84.68**	**8.2%**

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Calendar YTD 2017 Lee County Snapshot

Total Calendar Year 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
Germany	11%	6%	322,609	189,589
Canada	6%	8%	174,572	252,785
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%	24%
Repeat	68%	74%

	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%
OVERALL	**66.0%**	**67.6%**	**2.4%**	**$146.47**	**$146.07**	**-0.3%**	**$96.67**	**$98.69**	**2.1%**

Visitor Profile Analysis

Fall 2017

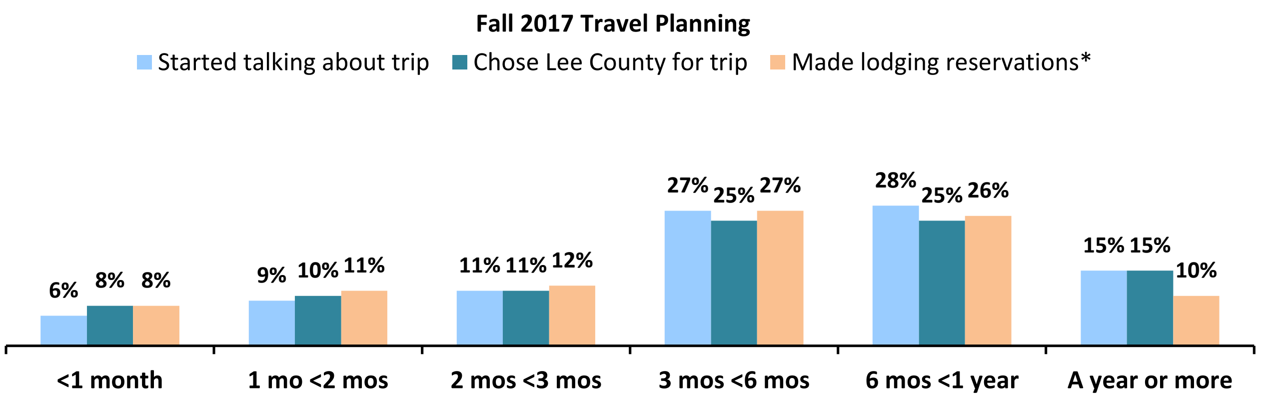
A total of 945 interviews were conducted with visitors in Lee County during the Fall months of October, November, and December 2017. A total sample of this size is considered accurate to plus or minus 3.2 percentage points at the 95% confidence level.

A total of 926 interviews were conducted with visitors in Lee County during the fall months of October, November, and December 2016. A total sample of this size is considered accurate to plus or minus 3.2 percentage points at the 95% confidence level.

Travel Planning

	Started Talking About Trip		Chose Lee County for Trip		Made Lodging Reservations*	
Fall Season	2016	2017	2016	2017	2016	2017
	A	B	A	B	A	B
Total Respondents	926	945	926	945	497*	527*
Less than 3 months (NET)	29%	26%	30%	29%	31%	31%
<1 month	7%	6%	8%	8%	9%	8%
1 month - <2 months	10%	9%	10%	10%	11%	11%
2 months - <3 months	12%	11%	12%	11%	11%	12%
3 months or more (NET)	66%	70%	60%	64%	58%	62%
3 months - <6 months	27%	27%	24%	25%	28%	27%
6 months - <1 year	26%	28%	23%	25%	23%	26%
A year or more	13%	15%	13%	15%	7%	10%
No Lodging Reservations Made	N/A	N/A	N/A	N/A	6%	4%
No Answer	5%	4%	10%b	7%	4%	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
Fall Season	A	B
Total Respondents	**926**	**945**
Any (NET)	96%	97%
Smartphone	57%	60%
Laptop computer	55%	55%
Tablet	42%	38%
Desktop computer	40%	37%
E-Reader	3% b	1%
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
Fall Season	A	B
Respondents who used a device to plan	**893**	**914**
Visited websites (net)	85%	86%
Airline websites	42%	46%
Search engines	27%	26%
Hotel websites	21%	23%
Booking websites	20%	20%
Vacation rental websites	24% b	19%
Trip Advisor	22%	19%
Facebook	8%	8%
Visit Florida	8% b	5%
www.FortMyers-Sanibel.com	7%	7%
AAA	6%	5%
Other	9%	10%
None/Didn't visit websites	13%	13%
No Answer	2%	1%

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

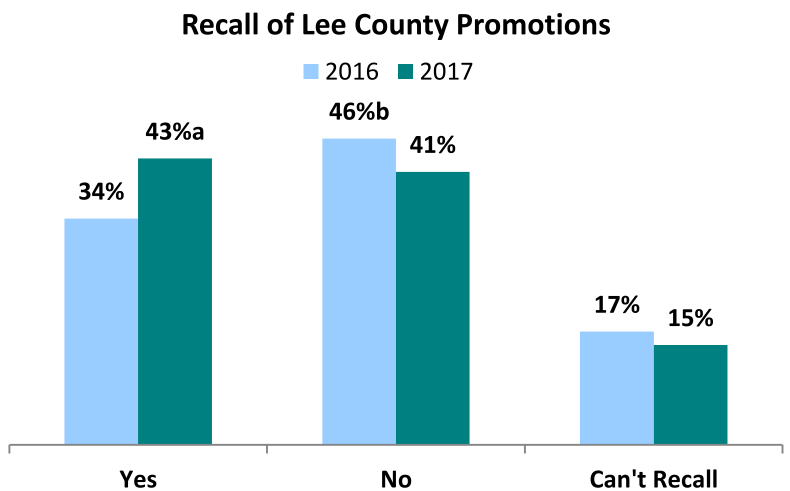
Travel Planning

Travel Information Requested		
	2016	2017
Fall Season	A	B
Total Respondents	**926**	**945**
Requested information (NET)	24%	23%
Hotel website	11%	10%
Call hotel	8% b	6%
VCB website	4%	3%
Visitor Guide	2%	2%
E-Newsletter	1%	<1%
Call local Chamber of Commerce	1%	<1%
Call VCB	1%	<1%
Magazine Reader Services Card	<1%	<1%
Other	7%	6%
None/Did not request information	69%	72%
No Answer	7%	5%

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

Recall of Lee County Promotions		
	2016	2017
Fall Season	A	B
Total Respondents	**926**	**945**
Yes	34%	43% a
No	46% b	41%
Can't Recall	17%	15%
No Answer	2% b	1%

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

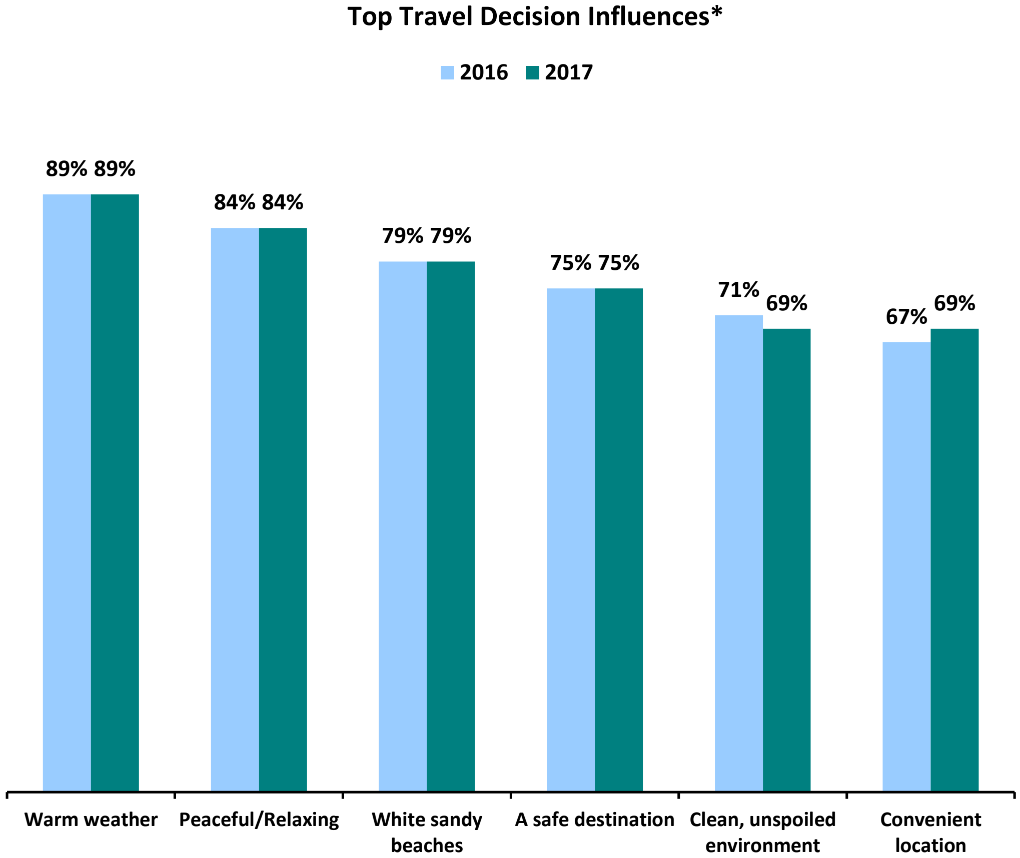


Travel Planning

Travel Decision Influences*		
Fall Season	**2016**	**2017**
	A	**B**
Total Respondents	**926**	**945**
Warm weather	89%	89%
Peaceful/Relaxing	84%	84%
White sandy beaches	79%	79%
A safe destination	75%	75%
Clean, unspoiled environment	71%	69%
Convenient location	67%	69%
Good value for the money	62%	60%
Plenty to see and do	59%	60%
A "family" atmosphere	49%	56% a
Affordable dining	55%	55%
Reasonably priced lodging	51%	51%
Upscale accommodations	43%	48% a

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		
Fall Season	2016	2017
	A	B
Total Respondents	**926**	**945**
Fly	74%	82% a
Drive a personal vehicle	19% b	13%
Drive a rental vehicle	4% b	2%
Drive an RV	2%	2%
Travel by bus	<1%	-
Other/No Answer	<1%	<1%

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

Frequency of Using SWFL Int'l (Past Year)		
Fall Season	2016	2017
	A	B
Total Respondents	**926**	**945**
One or more trips (NET)	60%	67% a
1 trip	36%	36%
2 to 3 trips	18%	22%
4 to 5 trips	3%	6% a
6 or more trips	3%	4%
None/No Answer	40% b	33%

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

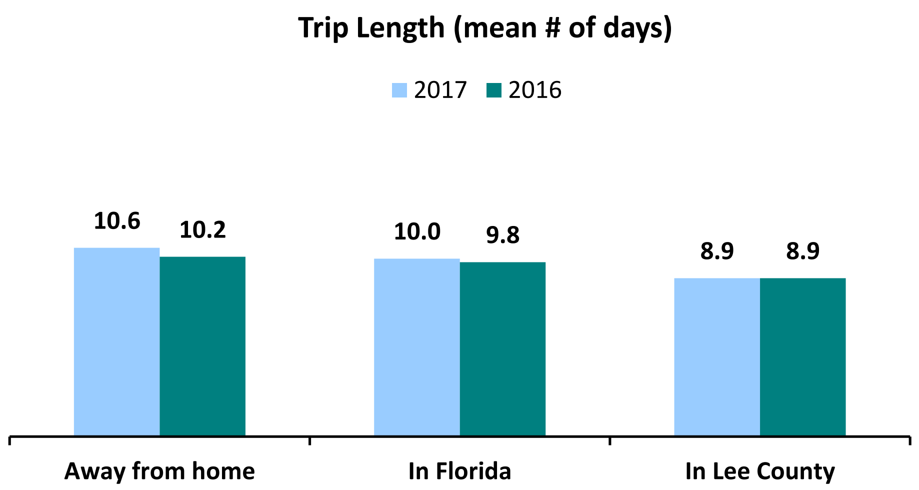
Airport Used		
Fall Season	2016	2017
	A	B
Respondents Who Flew	**689**	**777**
SW Florida Int'l (Fort Myers)	80%	79%
Punta Gorda	8%	7%
Miami Int'l	4%	5%
Ft. Lauderdale Int'l	3%	3%
Tampa Int'l	3%	2%
Orlando Int'l	2%	2%
Other/No Answer	1%	2% a

Q2: At which Florida airport did you land?

Trip Profile

Trip Length Mean # of Days		
Fall Season	2016	2017
	A	B
Total Respondents	**926**	**945**
Away from home	10.6	10.2
In Florida	10.0	9.8
In Lee County	8.9	8.9

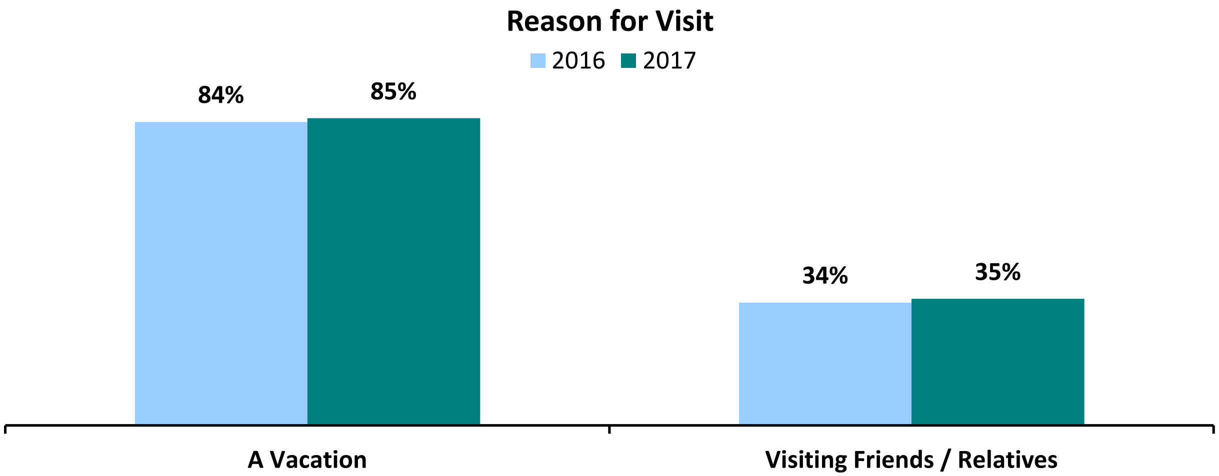
Q4a/b/c: On this trip, how many days will you be:



Trip Profile

Reason(s) for Visit		
Fall Season	2016	2017
	A	B
Total Respondents	**926**	**945**
A Vacation	84%	85%
Visiting Friends/Relatives	34%	35%
Personal Business	3%	2%
Sporting Event(s)	2%	1%
A Conference/Meeting	1%	1%
A Convention/Tradeshow	<1%	<1%
Other Business Trip	1%	1%
Other/No Answer	2%	2%

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



Trip Profile

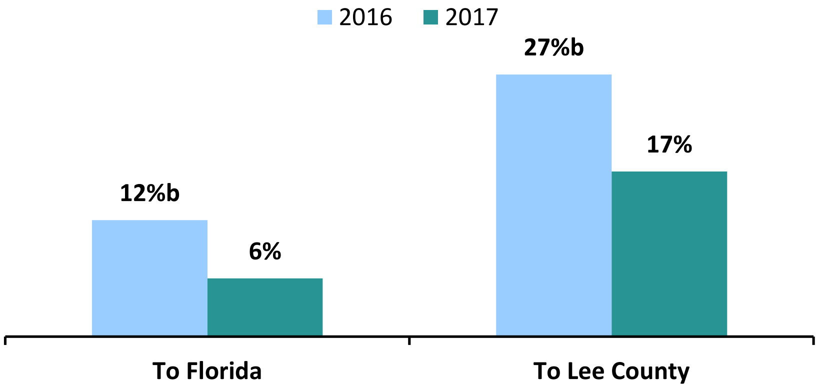
First Time Visitors to Lee County								
	Total		Florida Residents		Out-of-State Residents		International Visitors	
Fall Season	**2016**	**2017**	**2016**	**2017**	**2016**	**2017**	**2016**	**2017**
	A	**B**	**A**	**B**	**A**	**B**	**A**	**B**
Total Respondents	**926**	**945**	**23****	**18****	**524**	**552**	**235**	**213**
First-time visitor	27% b	17%	N/A	N/A	22% b	15%	41% b	25%
Repeat visitor	71%	81% a	N/A	N/A	77%	83% a	55%	74% a
No Answer	3%	2%	N/A	N/A	1%	2%	4%	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		
Fall Season	**2016**	**2017**
	A	**B**
Total Respondents	**926**	**945**
Yes, first-time visitor	12% b	6%
No	83%	91% a
No answer	2%	1%
*FL Residents**	3%	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.*

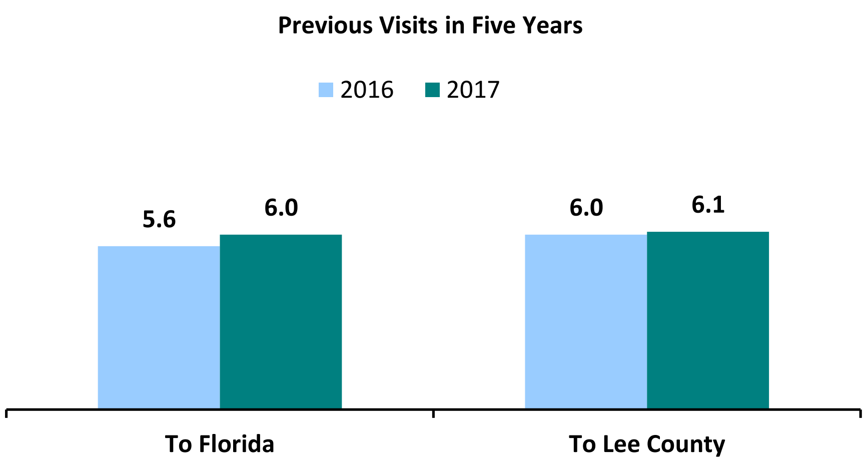
First Time Visitors



Trip Profile

Previous Visits in Five Years				
Fall Season	**Mean # of Visits to Florida**		**Mean # of Visits to Lee County**	
	2016	**2017**	**2016**	**2017**
	A	**B**	**A**	**B**
Base: Repeat Visitors	**773** (FL res. excl)	**861** (FL res. excl)	**656**	**766**
Number of visits	5.6	6.0	6.0	6.1

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?

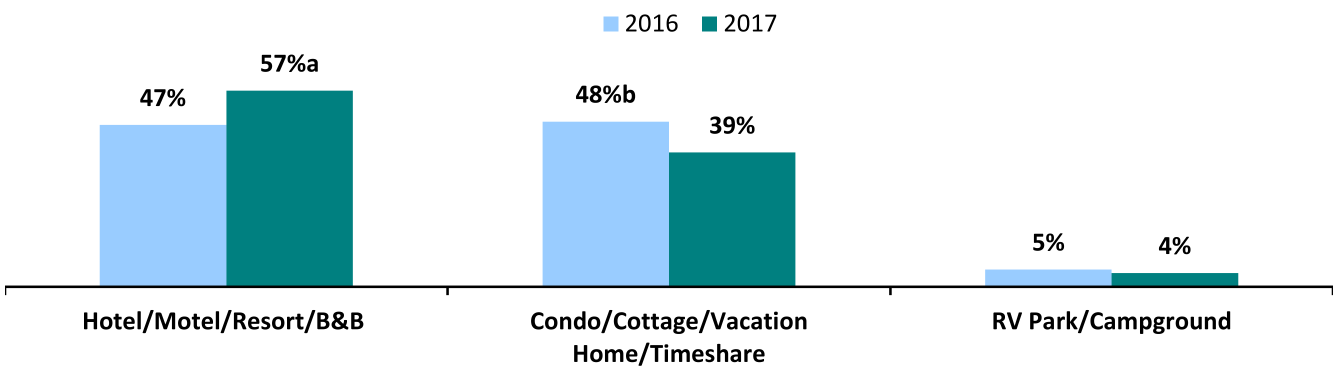


Trip Profile

Type of Accommodations Used		
Fall Season	2016	2017
	A	B
Base: Total respondents staying in paid accommodations	**497**	**527**
Hotel/Motel/Resort/B&B (NET)	**47%**	**57% a**
At a hotel/motel/historic inn	27%	31%
At a resort	19%	25% a
At a Bed and Breakfast	<1%	1%
Condo/Cottage/Vacation Home/Timeshare (NET)	**48% b**	**39%**
RV Park/Campground (NET)	**5%**	**4%**

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

Type of Accommodations Used



Trip Profile

Quality of Accommodations		
Fall Season	2016	2017
	A	B
Base: Total respondents staying in paid accommodations	**497**	**527**
Far exceeded/Exceeded expectations	39%	37%
Met your expectations	55%	58%
Did not meet/Far below expectations	4%	2%
No Answer	3%	3%

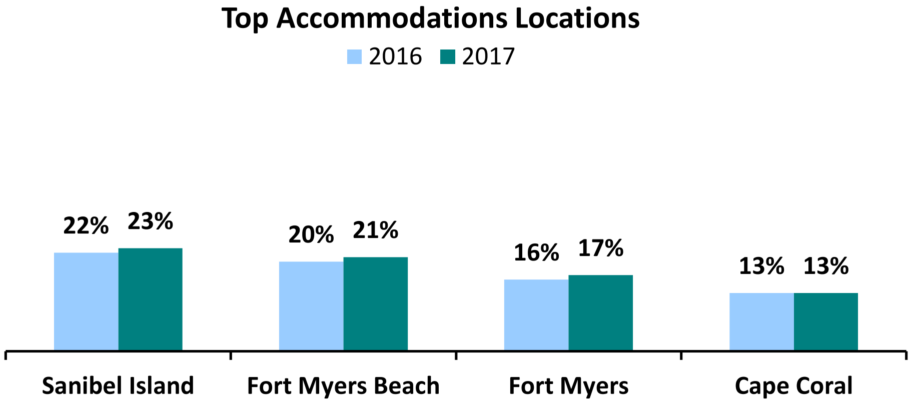
Q21: How would you describe the quality of your accommodations? Do you feel they:

Ratings by Subgroup	First-Timers		Repeaters		U.S. Residents		International Residents	
Fall Season	2016	2016	2016	2017	2016	2017	2016	2017
	A	B	A	B	A	B	A	B
Base: Total respondents staying in paid accommodations	**161**	**110**	**326**	**405**	**340**	**382**	**147**	**133**
Far exceeded/Exceeded expectations	38%	33%	40%	39%	43%	38%	30%	34%
Met your expectations	53%	57%	54%	57%	51%	58%	61%	59%
Did not meet/Far below expectations	3%	4%	4%b	1%	4%	2%	4%	1%
No Answer	6%	5%	2%	2%	1%	2%	5%	6%

Trip Profile

Location of Accommodations		
Fall Season	**2016**	**2017**
	A	**B**
Total Respondents	**926**	**945**
Sanibel Island	22%	23%
Fort Myers Beach	20%	21%
Fort Myers	16%	17%
Cape Coral	13%	13%
Bonita Springs	6%	5%
North Fort Myers	4%	3%
Estero	3%	3%
Lehigh Acres	2%	1%
Captiva Island	1%	1%
Other	1%	1%
Not staying overnight/ No Answer	15%	13%

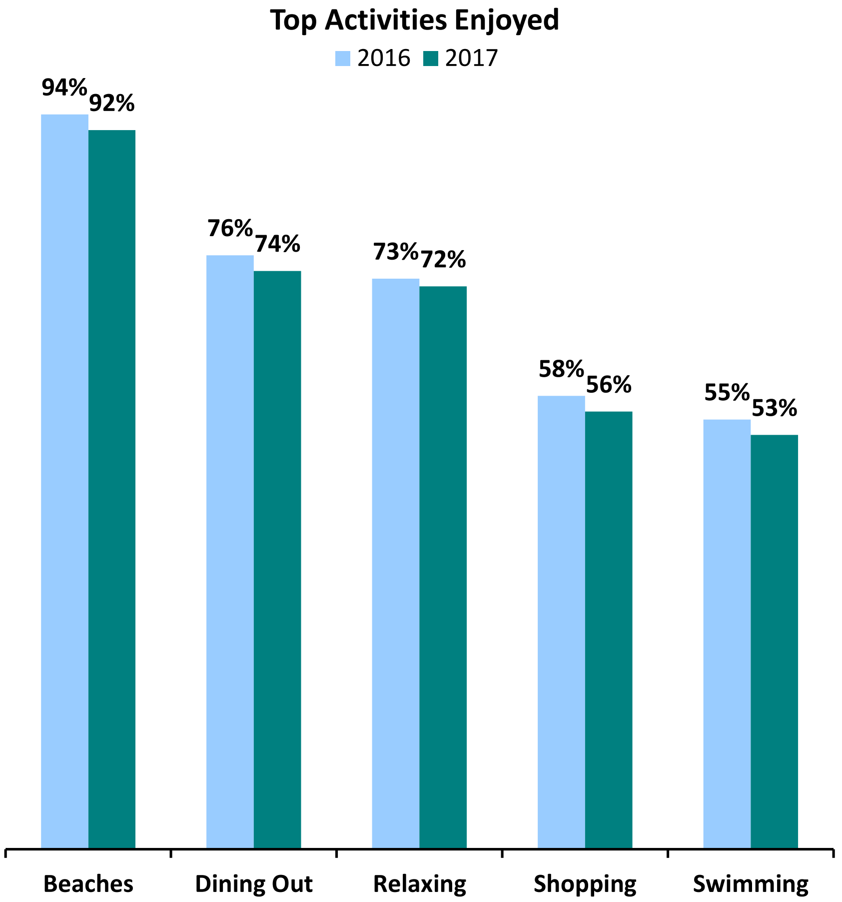
Q30: In which community are you spending the most nights for your accommodations during this visit in the Fort Myers/Sanibel area? *(Please mark one.)*



Trip Activities

Activities Enjoyed		
Fall Season	2016	2017
	A	B
Total Respondents	**926**	**945**
Beaches	94%	92%
Dining Out	76%	74%
Relaxing	73%	72%
Shopping	58%	56%
Swimming	55%	53%
Visiting Friends/Relatives	38%	36%
Shelling	34%	34%
Sightseeing	34%	33%
Watching Wildlife	24%	25%
Bicycle Riding	22%	22%
Exercise / Working Out	22% b	18%
Attractions	16%	18%
Photography	19%	17%
Bars / Nightlife	17%	16%
Golfing	15%	15%
Boating	12%	14%
Birdwatching	14%	13%
Fishing	10%	12%
Kayaking / Canoeing	6%	11% a
Miniature Golf	9%	7%
Tennis	4%	5%
Cultural Events	4%	4%
Guided Tour	4%	4%
Parasailing / Jet Skiing	3%	3%
Sporting Event	3%	3%
Scuba Diving / Snorkeling	1%	2%
Other	3%	3%
No Answer	1%	1%

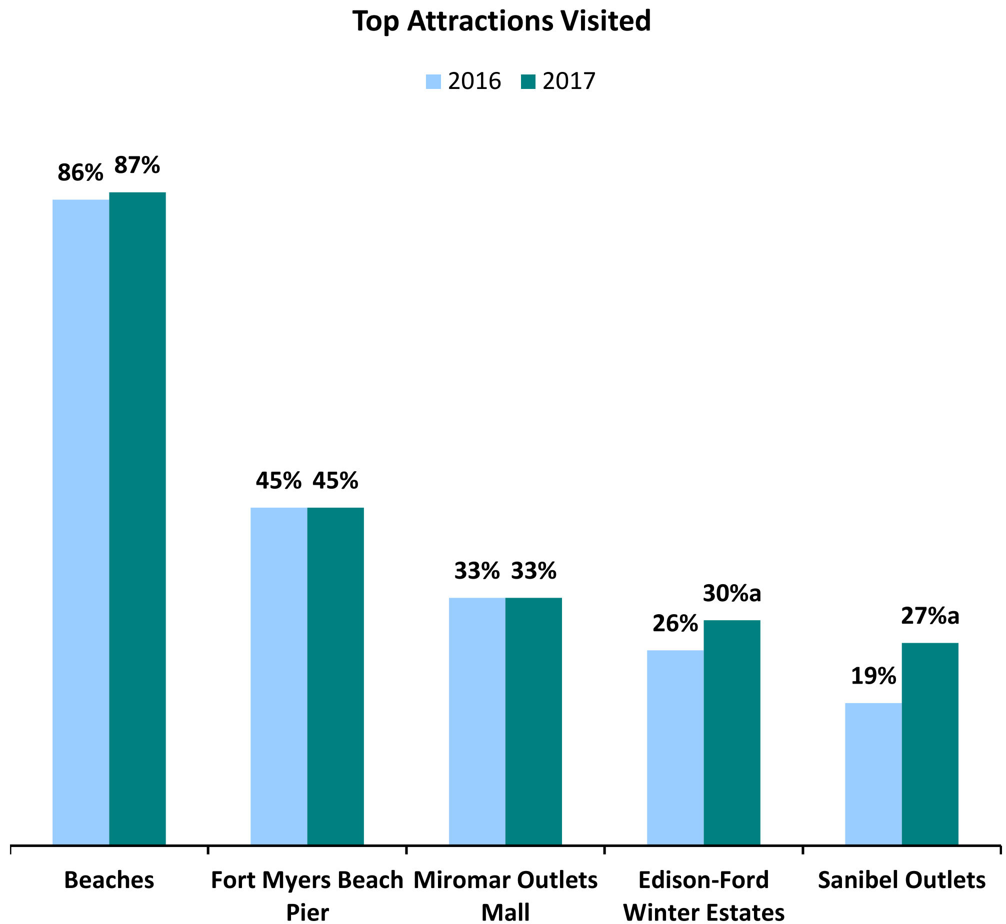
Q23: What activities or interests are you enjoying while in Lee County?
(Please mark ALL that apply.)



Trip Activities

Attractions Visited		
Fall Season	2016	2017
	A	B
Total Respondents	**926**	**945**
Beaches	86%	87%
Fort Myers Beach Pier	45%	45%
Miromar Outlets Mall	33%	33%
Edison-Ford Winter Estates	26%	30% a
Sanibel Outlets	19%	27% a
Sanibel Lighthouse	26%	25%
Ding Darling National Wildlife Refuge	11%	13%
Bell Tower Shops	12%	12%
Periwinkle Place	12%	11%
Gulf Coast Town Center	10%	11%
Coconut Point Mall	11%	11%
Edison Mall	7%	10% a
Shell Factory and Nature Park	10% b	6%
Manatee Park	5%	5%
Bailey-Matthews Shell Museum	2%	2%
Broadway Palm Dinner Theater	2%	2%
Barbara B. Mann Performing Arts Hall	2%	2%
Babcock Wilderness Adventures	1%	1%
Other	4%	5%
None/No Answer (NET)	7% b	4%

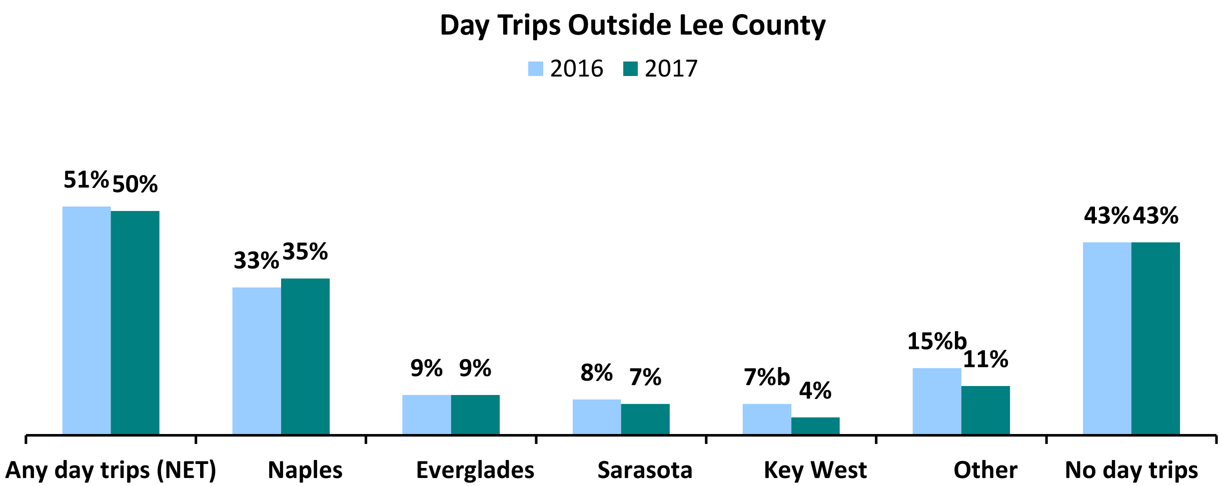
Q24: On this trip, which attractions are you visiting? *(Please mark ALL that apply.)*



Trip Activities

Day Trips Outside Lee County		
Fall Season	**2016**	**2017**
	A	**B**
Total Respondents	**926**	**945**
Any day trips (NET)	51%	50%
Naples	33%	35%
Everglades	9%	9%
Sarasota	8%	7%
Key West	7% b	4%
Other	15% b	11%
No day trips	43%	43%
No Answer	15%	14%

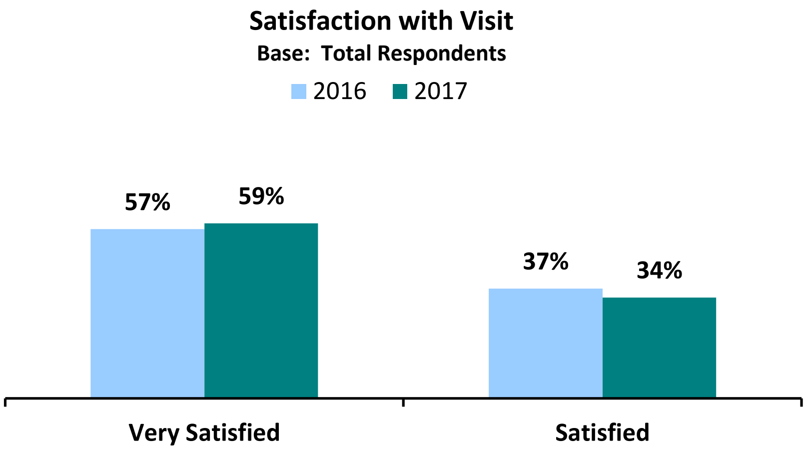
Q25: Where did you go on day trips outside Lee County?



Lee County Experience

Satisfaction with Visit	Total Respondents	
Fall Season	**2016**	**2017**
	A	**B**
Total Respondents	**926**	**945**
Very Satisfied/Satisfied	94%	93%
Very Satisfied	57%	59%
Satisfied	37%	34%
Neither	1%	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	
Fall Season	**2016**	**2017**	**2016**	**2017**	**2016**	**2017**	**2016**	**2017**
	A	**B**	**A**	**B**	**A**	**B**	**A**	**B**
Total Respondents	**246**	**160**	**656**	**766**	**671**	**711**	**235**	**213**
Very Satisfied/Satisfied	90%	91%	95%	94%	94%	94%	92%	94%
Very Satisfied	36%	44%	65%	63%	63%	64%	42%	49%
Satisfied	54%	46%	30%	31%	32%	30%	51%	46%

Future Plans

Likelihood to Recommend/Return to Lee County		
Fall Season	2016	2017
	A	B
Total Respondents	**926**	**945**
Likely to Recommend Lee County	87%	86%
Likely to Return to Lee County	91%	90%
Base: Total Respondents Planning to Return	**845**	**850**
Likely to Return Next Year	63%	65%

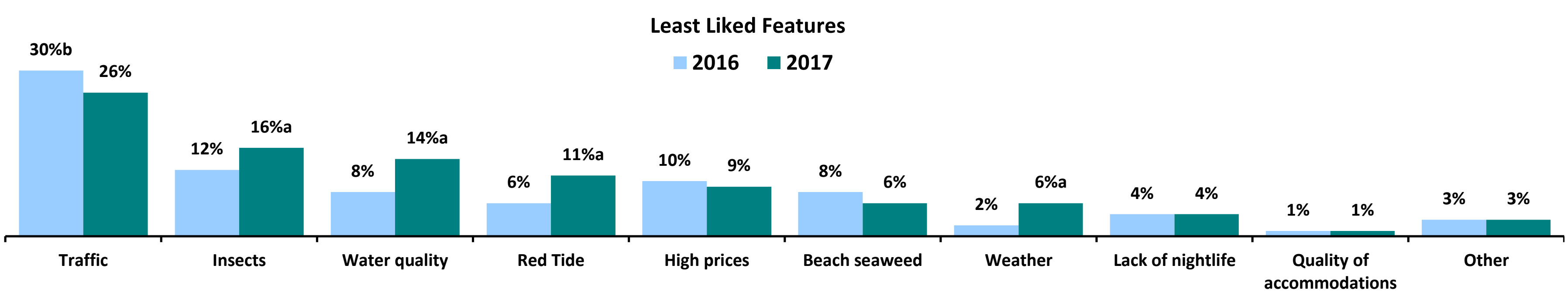
Q27: Would you recommend Lee County to a friend over other vacation areas in Florida?
Q31: Will you come back to Lee County?
Q32: Will you come back next year?

Ratings by Subgroup	First-Timers		Repeaters		U.S. Residents		International Residents	
Fall Season	2016	2017	2016	2017	2016	2017	2016	2017
	A	B	A	B	A	B	A	B
Total Respondents	**246**	**160**	**656**	**766**	**671**	**711**	**235**	**213**
Likely to Recommend Lee County	82%	75%	90%	89%	88%	86%	88%	89%
Likely to Return to Lee County	80%	74%	95%	94%	92%	91%	91%	89%
Base: Total Respondents Planning to Return	**197**	**118**	**625**	**717**	**614**	**646**	**214**	**189**
Likely to Return Next Year	35%	25%	72%	72%	67%	68%	52%	55%

Lee County Experience

Least Liked Features		
Fall Season	**2016**	**2017**
	A	**B**
Total Respondents	**926**	**945**
Traffic	30%b	26%
Insects	12%	16%a
Water quality	8%	14%a
Red Tide	6%	11%a
High prices	10%	9%
Beach seaweed	8%	6%
Weather	2%	6%a
Lack of nightlife	4%	4%
Quality of accommodations	1%	1%
Other	3%	3%
Nothing/No Answer (NET)	44%b	37%

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

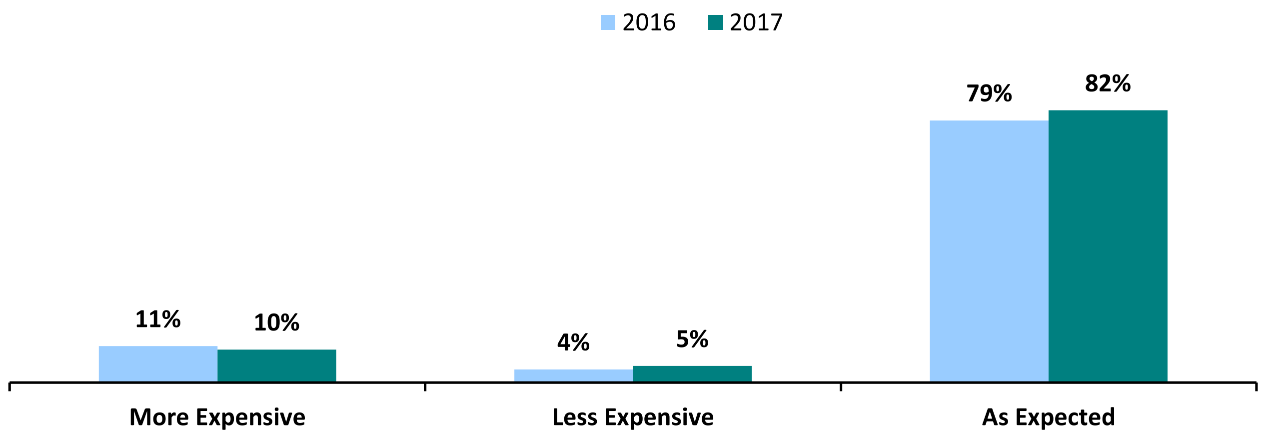


Lee County Experience

Perception of Lee County as Expensive		
Fall Season	2016	2017
	A	B
Total Respondents	**926**	**945**
More Expensive	11%	10%
Less Expensive	4%	3%
As Expected	79%	82%
Don't know/No Answer (NET)	7%	5%

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

Perception of Lee County as Expensive



Visitor and Travel Party Demographic Profile

Visitor Demographic Profile

Fall Season	2016	2017
	A	B
Total Respondents	**926**	**945**
Age of respondent (mean)	52.4	52.5
Annual household income (mean)	$101,200	$104,700
Martial Status		
Married	73%	74%
Single	13%	13%
Other	11%	10%
Vacations per year (mean)	3.1	3.5
Short getaways per year (mean)	3.7	3.7

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

Travel Party

Fall Season	2016	2017
	A	B
Total Respondents	**926**	**945**
Couple	41%	43%
Family	29%	33%
Group of couples/friends	14%	12%
Single	10%	8%
Mean travel party size	3.1	3.1
Mean adults in travel party	2.7	2.7

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

Travel Parties with Children

Fall Season	2016	2017
	A	B
Total Respondents	**926**	**945**
Traveling with any Children (NET)	20%	20%
Any younger than 6	8%	9%
Any ages 6-11	9%	7%
Any 12-17 years old	11%	9%
No Children	80%	80%

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		
Fall Season	**2016**	**2017**	**2016**	**2017**	**% Change**
Paid Accommodations	67%	69%	745,398	786,552	5.5%
Friends/Relatives	33%	31%	362,598	352,374	-2.8%
Total Visitation			**1,107,996**	1,138,926	2.8%

Visitors Staying in Paid Accommodations

	%		Visitor Estimates		Direction of Change
Fall Season	**2016**	**2017**	**2016**	**2017**	
Country of Origin					
United States	70%	74%	520,401	582,292	+
Canada	7%	9%	55,101	74,692	+
Germany	11%	8%	82,652	59,449	-
UK	4%	4%	30,612	35,059	+
Scandinavia	4%	2%	29,081	13,719	-
Switzerland	1%	1%	4,592	7,622	+
BeNeLux	1%	1%	4,592	4,573	-
France	1%	<1%	6,122	3,049	-
Austria	<1%	<1%	3,061	3,049	-
Latin America	1%	<1%	4,592	1,524	-
Ireland	-	<1%	-	1,524	+
Other International	1%	-	4,592	-	-

U.S. Region of Origin	2016	2017	2016	2017	Direction of Change
Florida	5%	5%	24,075	27,265	+
South (including Florida)	24%	22%	124,081	130,480	+
Midwest	48%	48%	251,867	278,488	+
Northeast	21%	24%	109,266	140,218	+
West	7%	6%	35,187	33,107	-

Fall 2017 Top DMAs (Paid Accommodations)

Detroit	6%	33,107
Boston (Manchester, NH)	5%	31,159
Minneapolis-Saint Paul	5%	29,212
Cleveland-Akron (Canton)	5%	29,212
New York	5%	29,212
Chicago	4%	21,422
Indianapolis	3%	19,475
Atlanta	3%	19,475

Note: The percentage of visitors by origin market is based on data collected from visitors in the Visitor Profile Survey. Respondents who did not answer the area of residence questions are excluded when calculating the 2017 percentages.

Occupancy Data Analysis
Fall 2017

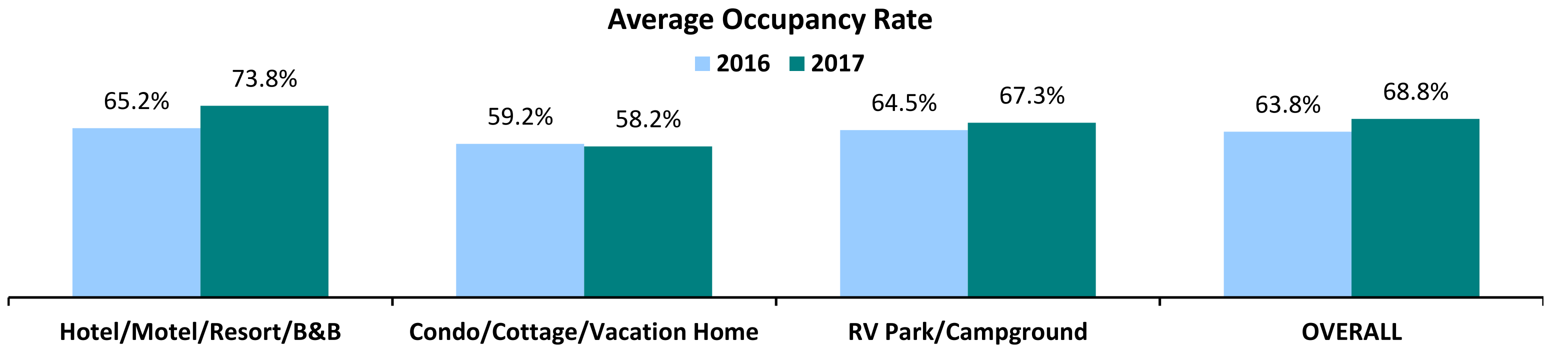
For the 2017 fall season, property managers were interviewed in January 2018 to provide data for each specific month of the season (October, November, December 2017).

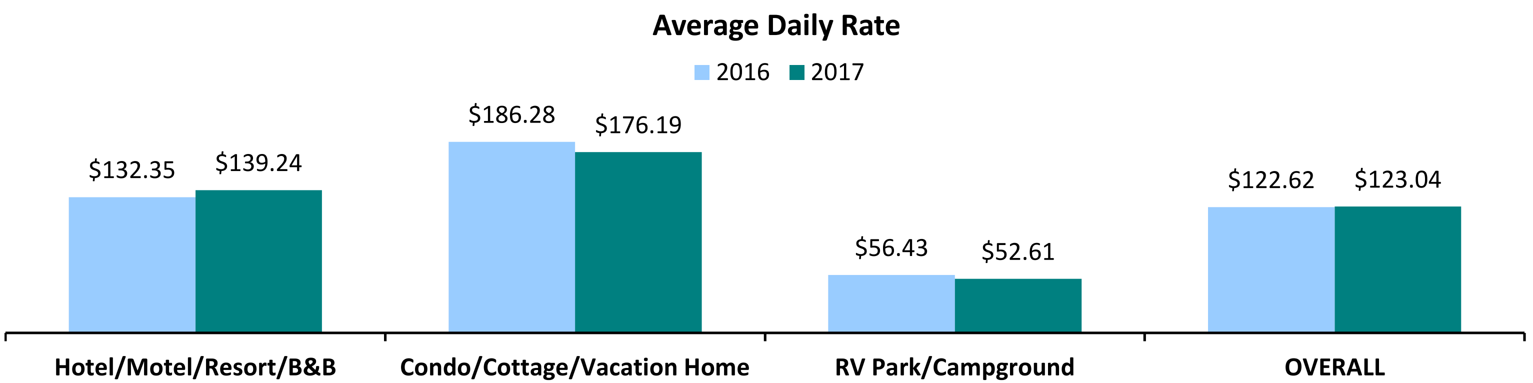
For the 2016 fall season, property managers were interviewed in January 2017 to provide data for each specific month of the season (October, November, December 2016).

Occupancy/Daily Rates

	Average Occupancy Rate			Average Daily Rate			RevPAR		
Fall Season	**2016**	**2017**	**% Change**	**2016**	**2017**	**% Change**	**2016**	**2017**	**% Change**
Hotel/Motel/Resort/B&B	65.2%	73.8%	13.1%	$132.35	$139.24	5.2%	$86.30	$102.70	19.0%
Condo/Cottage/Vacation Home	59.2%	58.2%	-1.6%	$186.28	$176.19	-5.4%	$110.22	$102.55	-7.0%
RV Park/Campground	64.5%	67.3%	4.3%	$56.43	$52.61	-6.8%	$36.42	$35.40	-2.8%
OVERALL	**63.8%**	**68.8%**	**7.8%**	**$122.62**	**$123.04**	**0.3%**	**$78.26**	**$84.68**	**8.2%**

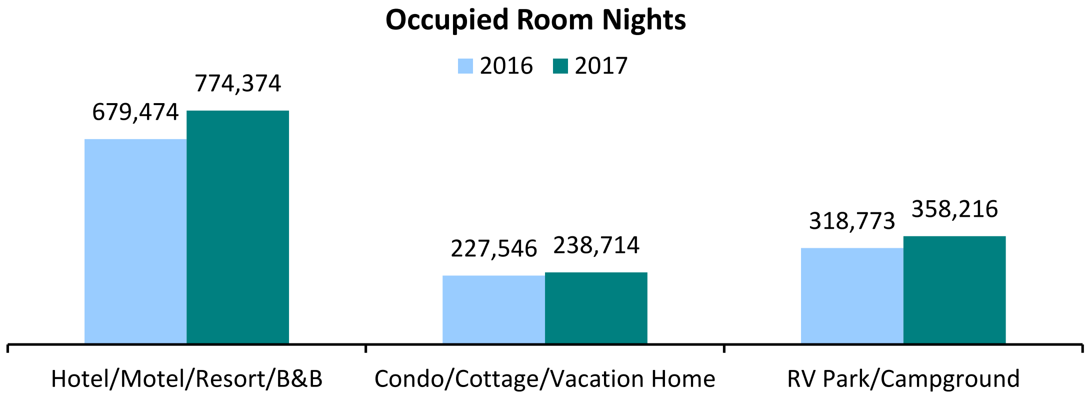
Q16: What was your overall average occupancy rate for the month of [October/November/December]?
Q17: What was your average daily rate (ADR) in [October/November/December]?

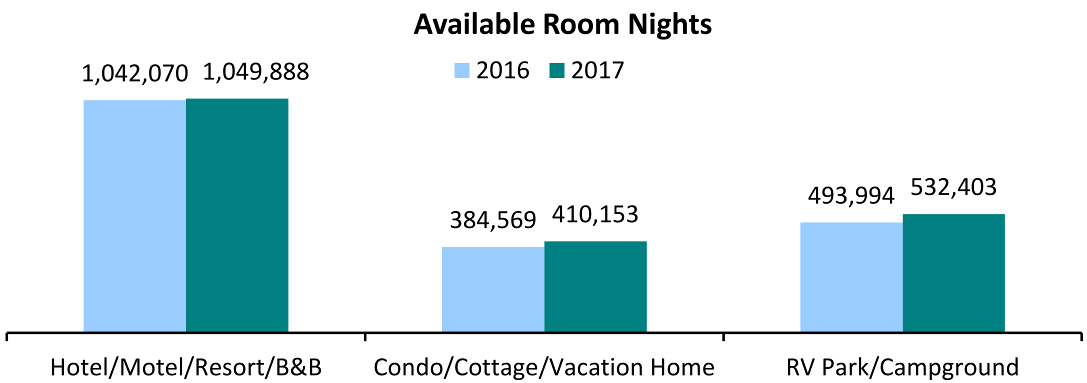




Room/Unit/Site Nights

	Occupied Room Nights			Available Room Nights		
Fall Season	**2016**	**2017**	**% Change**	**2016**	**2017**	**% Change**
Hotel/Motel/Resort/B&B	679,474	774,374	14.0%	1,042,070	1,049,888	0.8%
Condo/Cottage/Vacation Home	227,546	238,714	4.9%	384,569	410,153	6.7%
RV Park/Campground	318,773	358,216	12.4%	493,994	532,403	7.8%
Total	**1,225,793**	**1,371,304**	**11.9%**	**1,920,633**	**1,992,444**	**3.7%**



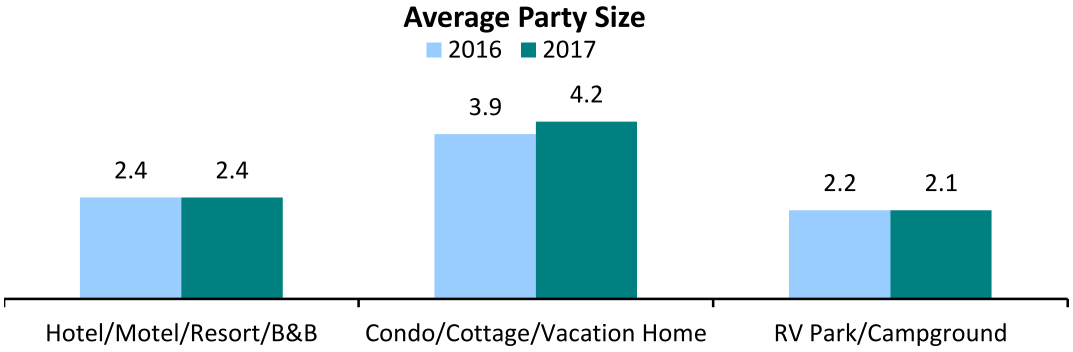


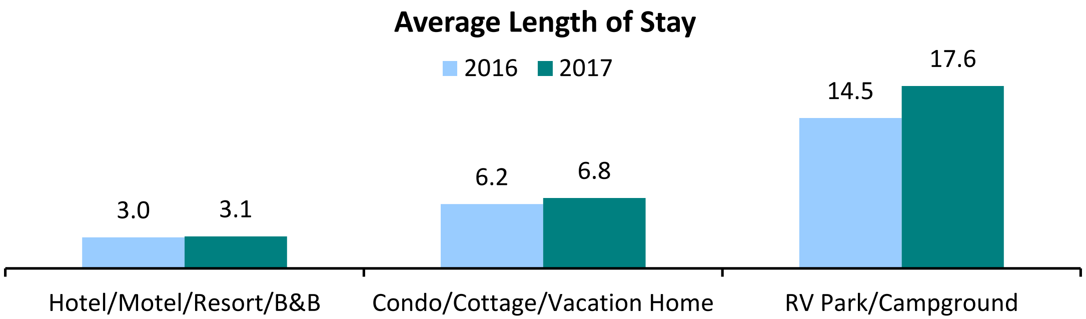
Average Party Size and Length of Stay

	Average Party Size			Average Length of Stay		
Fall Season	**2016**	**2017**	**% Change**	**2016**	**2017**	**% Change**
Hotel/Motel/Resort/B&B	2.4	2.4	-0.4%	3.0	3.1	5.4%
Condo/Cottage/Vacation Home	3.9	4.2	7.9%	6.2	6.8	9.6%
RV Park/Campground	2.2	2.1	-2.3%	14.5	17.6	21.1%
Average	**2.6**	**2.7**	**0.8%**	**4.3**	**4.6**	**6.7%**

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

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



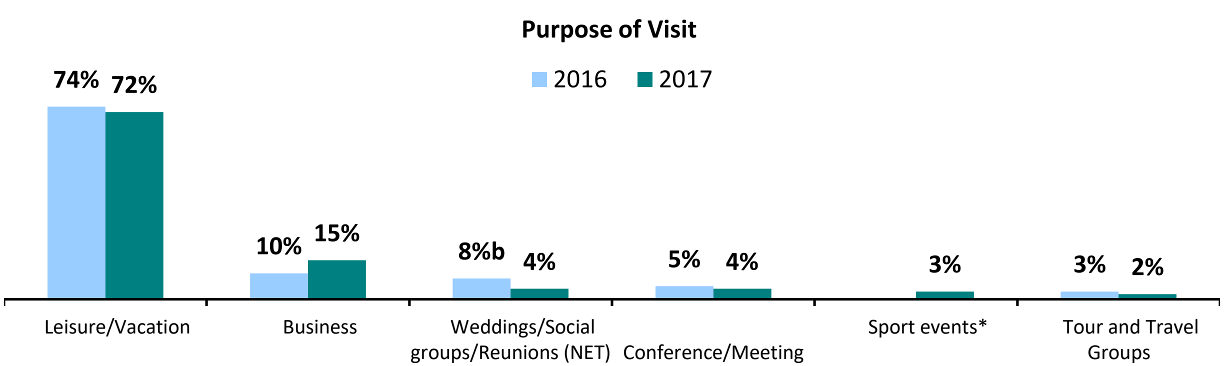


Lodging Management Estimates

Guest Profile		
Fall Season	2016	2017
	A	B
Total Number of Responses	**89**	**115**
Purpose of Visit		
Leisure/Vacation	74%	72%
Business	10%	15%
Weddings/Social groups/Reunions (NET)	8%b	4%
Conference/Meeting	5%	4%
Sport events*	-	3%
Tour and Travel Groups	3%	2%

Q22: What percent of your [October/November/December] room/site/unit occupancy do you estimate was generated by:

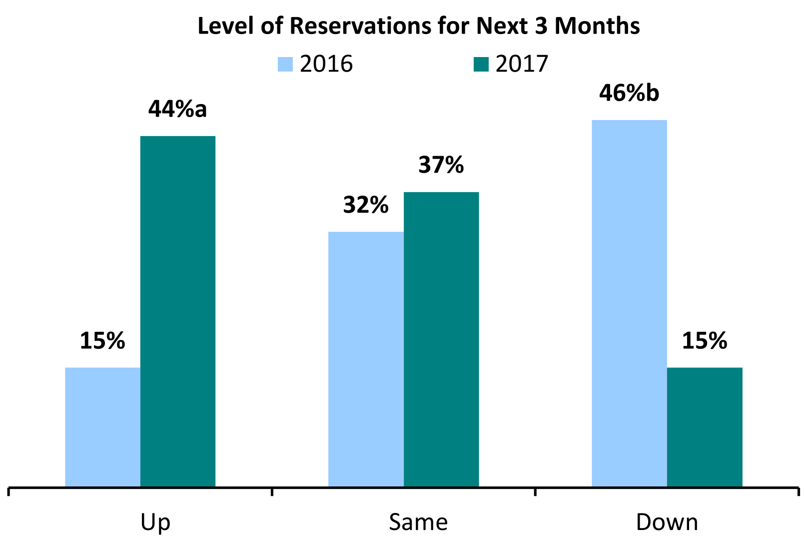
** "Sport events" was added to the questionnaire as a response option in the 2nd quarter of 2017, so there is no comparison with the prior year's data on this response.*



Occupancy Barometer

Level of Reservations for Next 3 Months Compared to Last Year		
Fall Season	**2016**	**2017**
	A	**B**
Total Respondents	**102**	**123**
Up/Same (NET)	47%	80% a
Up	15%	44% a
Same	32%	37%
Down	46% b	15%

Q24: Compared to January, February, and March of 2016, is your property's total level of reservations up, the same or down for January, February, and March of 2017?



Economic Impact Analysis
Fall 2017

Total Visitor Expenditures by Spending Category

TOTAL EXPENDITURES			
Fall Season	2016	2017	% Change
TOTAL	$655,533,396	$707,320,742	7.9%
Food and Beverages	$164,657,850	$176,709,490	7.3%
Shopping	$174,726,078	$182,893,788	4.7%
Lodging Accommodations	$150,306,872	$168,729,536	12.3%
Ground Transportation	$59,419,523	$61,844,102	4.1%
Other	$106,423,073	$117,143,826	10.1%

(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.)

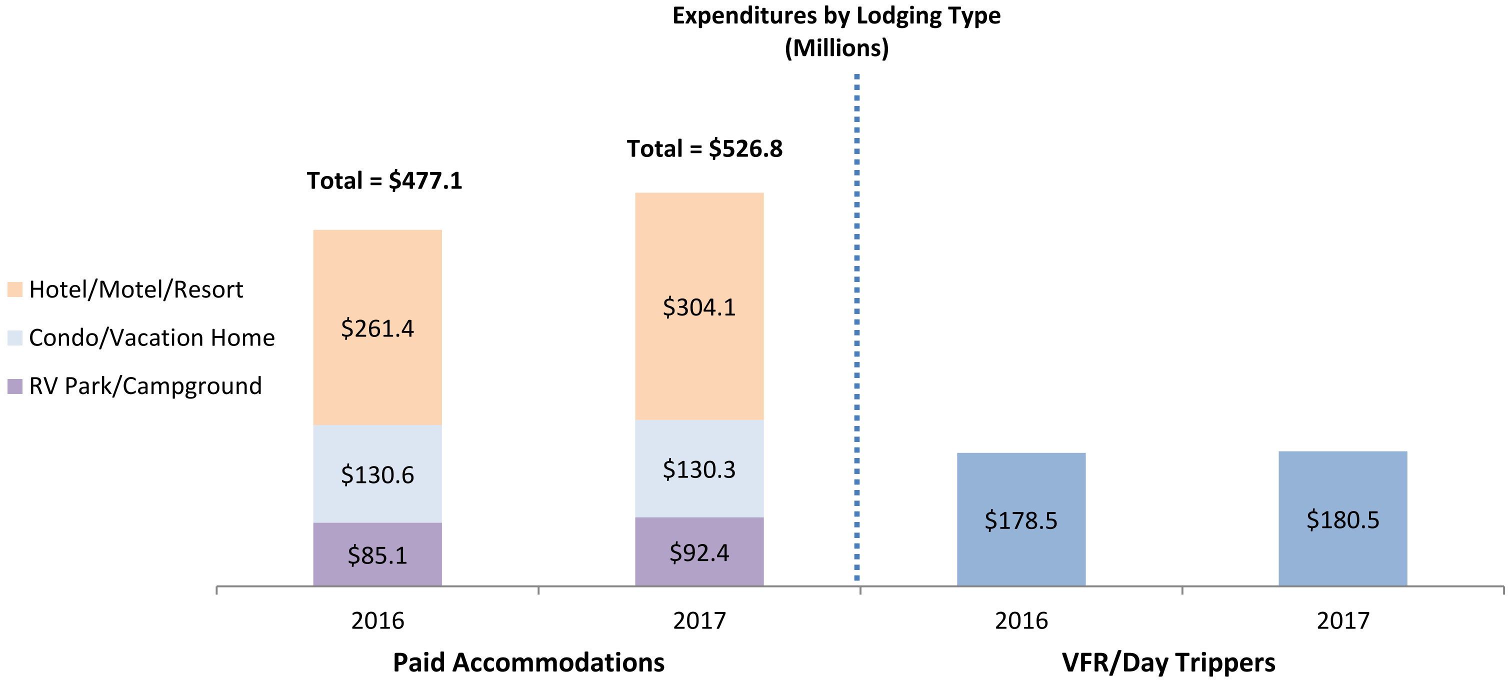
Total Visitor Expenditures by Lodging Type

TOTAL EXPENDITURES						
	Staying in Paid Accommodations			Visiting Friends and Relatives/Day Trippers		
Fall Season	2016	2017	% Change	2016	2017	% Change
TOTAL	$477,059,099	$526,825,538	10.4%	$178,474,297	$180,495,204	1.1%
Lodging Accommodations	$150,306,872	$168,729,536	12.3%	$0	$0	--
Food and Beverages	$105,335,935	$116,731,725	10.8%	$59,321,915	$59,977,765	1.1%
Shopping	$113,848,939	$122,115,403	7.3%	$60,877,139	$60,778,385	-0.2%
Ground Transportation	$40,036,601	$42,885,289	7.1%	$19,382,922	$18,958,813	-2.2%
Other	$67,530,752	$76,363,585	13.1%	$38,892,321	$40,780,241	4.9%

“Other” includes the following categories:
- Liquor Purchases
- Other Sightseeing/Attractions
- Historic/Cultural Site Admissions
- Popular Events Admissions
- Sports Fees
- Other Evening Entertainment
- Gaming
- Cultural Performance Admissions
- Licenses/Registrations/Permits
- Sweepstakes Tickets
- All Other

Total Visitor Expenditures by Lodging Type

Total Expenditures by Lodging Type					
Fall Season	**2016**	**2017**	**% Change**	**2016**	**2017**
TOTAL	$655,533,396	$707,320,742	7.9%	100%	100%
Visiting Friends & Relatives/Day Trippers	$178,474,297	$180,495,204	1.1%	27%	26%
Paid Accommodations	$477,059,099	$526,825,538	10.4%	73%	74%
Hotel/Motel/Resort/B&B	$261,350,149	$304,074,492	16.3%	40%	43%
Condo/Cottage/Vacation Home	$130,614,751	$130,327,575	-0.2%	20%	18%
RV Park/Campground	$85,094,199	$92,423,471	8.6%	13%	13%



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.

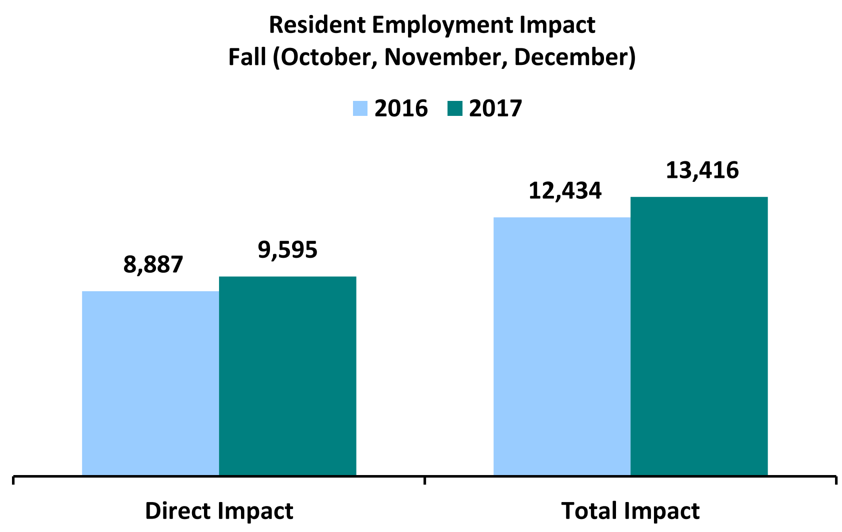
Impact on Jobs for Lee County Residents

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.).



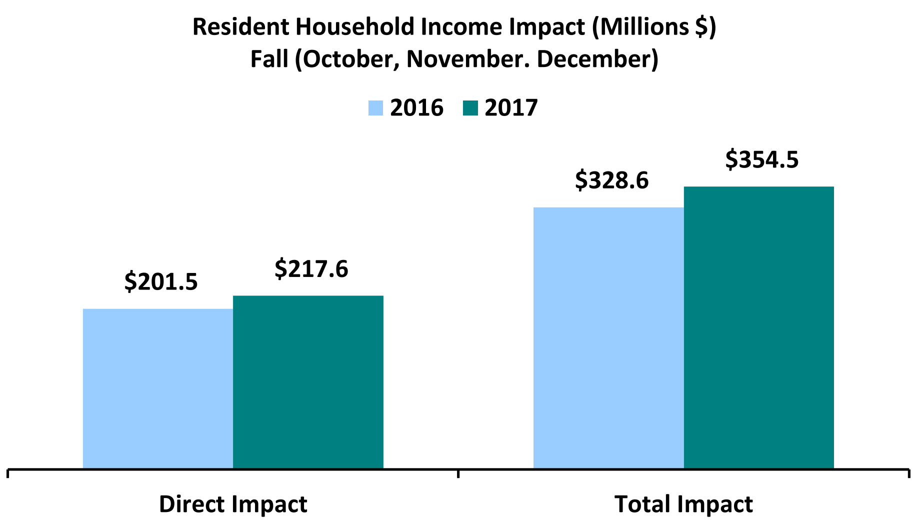
Impact on Household Income for Lee County Residents

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.

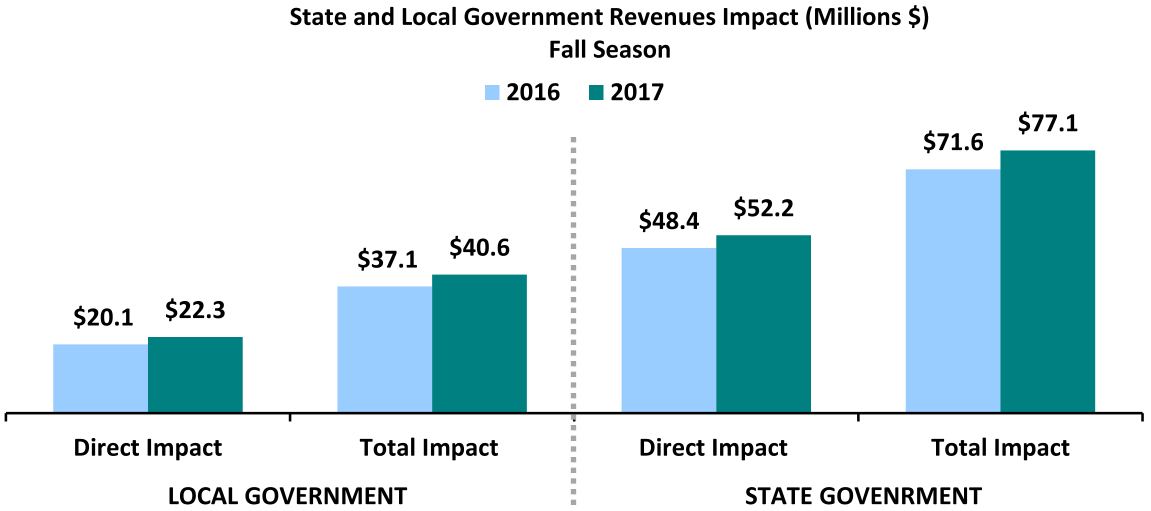
The gross government revenues accruing to governments as a result of producing the output purchased with visitor expenditures is the government revenue impact.

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).



THE BEACHES OF FORT MYERS AND SANIBEL

Appendix

Fall 2017

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THE BEACHES OF FORT MYERS AND SANIBEL

October 2017 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Fort Myers Beach	Winward Passage	10/4/17	6
Fort Myers Beach	Times Square	10/4/17	14
Fort Myers Beach	Best Western	10/4/17	12
Fort Myers	RSW Airport	10/7/17	31
Bonita Springs	Bonita Beach	10/12/17	25
Sanibel	Sanibel Moorings	10/13/17	6
Sanibel	Logger Head Cay	10/13/17	8
Sanibel	Sanibel Inn	10/13/17	11
Fort Myers	Edison-Ford Winter Estates	10/15/17	21
Fort Myers	Edison-Ford Winter Estates	10/25/17	22
Estero	Miromar Outlet	10/26/17	24
Sanibel	Holiday Inn	10/27/17	10
Sanibel	Pelican Roost	10/27/17	6
Sanibel	Sanibel Surfside	10/27/17	5
Sanibel	Compass Pointe	10/27/17	7
Sanibel	Lighthouse Beach	10/27/17	16
Fort Myers	RSW Airport	10/28/17	34
Fort Myers Beach	Diamond Head Resort	10/29/17	12
Fort Myers Beach	Neptune Inn	10/29/17	5
Fort Myers Beach	Estero Island Beach Club	10/29/17	9
Fort Myers Beach	The Pier	10/29/17	12
Fort Myers	Edison-Ford Winter Estates	10/31/17	23
Total			**319**

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November 2017 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Fort Myers	RSW Airport	11/4/17	33
Bonita Springs	Bonita Beach	11/9/17	26
Fort Myers	Edison-Ford Winter Estates	11/10/17	19
Sanibel	Sanibel Inn	11/14/17	10
Sanibel	Sanibel Moorings	11/14/17	7
Sanibel	Loggerhead Cay	11/14/17	7
Sanibel	Coquina Beach	11/14/17	8
Fort Myers Beach	The Pier	11/16/17	14
Fort Myers Beach	Windward Passage	11/16/17	7
Fort Myers Beach	Cane Palm	11/16/17	7
Fort Myers Beach	Best Western	11/16/17	10
Fort Myers	Edison-Ford Winter Estates	11/17/17	24
Fort Myers	RSW Airport	11/18/17	32
Fort Myers Beach	Estero Island Beach Club	11/25/17	8
Fort Myers Beach	Diamond Head Resort	11/25/17	8
Fort Myers Beach	Neptune Inn	11/25/17	6
Fort Myers Beach	Times Square	11/25/17	10
Estero	Miromar Outlet	11/28/17	20
Sanibel	Holiday Inn	11/29/17	10
Sanibel	Pelican Roost	11/29/17	6
Sanibel	Sanibel Surfside	11/29/17	10
Fort Myers	Edison-Ford Winter Estates	11/30/17	21
Sanibel	Lighthouse Beach	11/30/17	14
Total			**317**

December 2017 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Fort Myers	RSW Airport	12/9/17	27
Bonita Springs	Bonita Beach	12/7/17	25
Fort Myers Beach	Best Western	12/12/17	9
Fort Myers Beach	Winward Passage	12/12/17	5
Fort Myers Beach	The Pier	12/12/17	18
Fort Myers	Edison-Ford Winter Estates	12/15/17	28
Sanibel	Torguga Beach Resort	12/20/17	8
Sanibel	Holiday Inn	12/20/17	11
Sanibel	Sanibel Surfside	12/20/17	8
Sanibel	Pelican Roost	12/20/17	5
Fort Myers	Centennial Park	12/26/17	9
Sanibel	Sanibel Inn	12/27/17	12
Sanibel	Song of the Sea	12/27/17	6
Sanibel	Loggerhead Cay	12/27/17	6
Sanibel	Lighthouse Beach	12/27/17	12
Fort Myers	Edison-Ford Winter Estates	12/28/17	27
Estero	Miromar Outlet	12/28/17	21
Fort Myers Beach	Diamond Head Resort	12/29/17	9
Fort Myers Beach	Estero Island Beach Club	12/29/17	8
Fort Myers Beach	Sunset Celebration	12/30/17	18
Fort Myers	RSW Airport	12/30/17	37
Total			**309**

Occupancy Interviewing Statistics

Interviews were conducted during the first two weeks of January 2018 to gather information about lodging activity during October, November, and December 2017. Information was provided by 131 Lee County lodging properties.

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Lodging Type	Fall 2017 Number of Interviews
Hotel/Motel/Resort/B&Bs	85
Condo/Cottage/Vacation Home/Timeshare	32
RV Park/Campground	14
Total	**131**

Note: Responses to survey questions are not forced, therefore, the number of respondents answering each individual question varies.