



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

Winter 2017 Visitor Profile and Occupancy Analysis

May 11, 2017

Prepared for:

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

Prepared by:

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Executive Summary

Winter 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 winter 2017 season, Lee County hosted more than 728,000 visitors staying in paid accommodations and about 595,000 staying with friends or relatives, for a total of 1.3 million visitors.
- Winter 2017 visitation among paid accommodations guests was up 0.6% from 2016, and visitation among those staying with friends or relatives dropped 1.9%. As a result, Lee County saw no significant decrease in total visitation versus winter 2016.

Estimated Visitation	Winter 2016	Winter 2017	% Change
Paid Accommodations	724,071	728,209	0.6%
Friends/Relatives	606,576	595,032	-1.9%
Total Visitation	1,330,647	1,323,241	-0.6%

Visitor Expenditures

- Winter 2017 visitors spent an estimated \$1.15 billion during their stay in Lee County, which was slightly lower than among winter 2016 visitors (\$1.16 billion).
- Expenditures among winter 2017 paid accommodations guests amounted to \$852 million (74% of the total). Those staying with friends or relatives contributed the remaining \$295 million. Spending among winter season guests decreased 1.1% year-over-year.

Estimated Expenditures	Winter 2016	Winter 2017	% Change
Paid Accommodations	\$859,414,065	\$851,964,885	-0.9%
Friends/Relatives	\$301,163,095	\$295,368,124	-1.9%
Total Expenditures	\$1,160,577,160	\$1,147,333,009	-1.1%

Note: Winter season refers to the period including January, February, and March when referenced throughout this report.

Visitor Origin

- Similar to last year, eight in ten winter 2017 visitors staying in paid accommodations reside within the United States (82%). The majority of international visitors staying in paid accommodations came from Canada (12%), followed by Germany and the UK (2% each).
- More than half of domestic paid accommodations visitors came from the Midwest (52%). A third of visitors came from the Northeast (30%), with fewer from the South (13%), and a small minority from the West (4%).
- Minneapolis, Chicago, and Indianapolis were the top Midwest domestic feeder markets for the Lee County lodging industry during winter 2017. Boston and New York were the primary contributors from the Northeast region.

Winter 2017 Top DMAs (Paid Accommodations)		
Minneapolis-Saint Paul	9%	54,329
Boston (Manchester, NH)	7%	43,464
New York	6%	37,254
Chicago	6%	37,254
Indianapolis	4%	21,732
Philadelphia	3%	18,627
Detroit	3%	17,075
Saint Louis	3%	15,523
Hartford-New Haven	3%	15,523
Cleveland-Akron (Canton)	2%	13,970

Visitors Staying in Paid Accommodations					
Winter Season	%		Visitor Estimates		Direction of Change
	2016	2017	2016	2017	
Country of Origin					
United States	79%	82%	570,782	599,175	+
Canada	9%	12%	68,544	88,152	+
Germany	5%	2%	34,895	17,886	-
UK	5%	2%	34,895	12,776	-
Scandinavia	1%	1%	7,477	6,388	-
BeNeLux	<1%	<1%	2,492	1,278	-
Switzerland	<1%	<1%	1,246	1,278	+
Latin America	<1%	<1%	1,246	-	-
Other International	<1%	<1%	2,492	1,278	-

Visitors Staying in Paid Accommodations					
Winter Season	%		Visitor Estimates		Direction of Change
	2016	2017	2016	2017	
U.S. Region of Origin					
Florida	2%	1%	9,460	4,657	-
South (including Florida)	15%	13%	86,721	79,166	-
Midwest	59%	52%	337,424	312,006	-
Northeast	22%	30%	126,140	180,063	+
West	4%	4%	20,498	23,284	+

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

- Many of Lee County's winter 2017 visitors planned their Lee County trip well in advance - on par with last year. Two-thirds started talking about their Lee County trip *three or more months* in advance, and six in ten chose the destination within that timeframe. Among those staying in paid accommodations, six in ten made their lodging reservations within that window as well.
 - 67% started talking about trip (vs. 67% in 2016)
 - 61% chose Lee County for trip (vs. 61% in 2016)
 - 58% made lodging reservation (vs. 59% in 2016)
- The Internet continues to be a key tool for planning their trip, with eight in ten 2017 winter visitors indicating they have visited one or more websites to prepare for their Lee County trip (83% vs. 87% in 2016). Visitors most often mentioned using *airline websites* (41%), followed by *search engines* (30%), *vacation rental websites* (26%), *hotel websites* (23%), *Trip Advisor* (21%), or *booking websites* (20%).
- More than half of Lee County's winter 2017 visitors reported that they use their laptop to access destination planning information online (55%). The same proportion said they use their smartphone (55%), and fewer mentioned using a tablet (41% - a slight decrease from last year's 44%) or desktop computer (40%).
- The characteristics rated most favorably as influencing the decision to visit Lee County in winter 2017 included:
 - *Warm weather* (93%);
 - *Peaceful/relaxing* (84%);
 - *White sandy beaches* (80% - an increase over last year's 75%);
 - *A safe destination* (74%);
 - *Clean, unspoiled environment* (69%); and
 - *Convenient location* (68%).

Visitor Profile

- Seven in ten winter 2017 visitors flew to the area as their primary mode of transportation, an increase over last winter (72% vs. 67% in 2016). The majority arrived at Southwest Florida International Airport (85%).
- On average, winter 2017 visitors stayed in Lee County for about 9 days. The majority indicated they came to Lee County for a vacation (83%), and two in five were visiting with friends or relatives (39%). Three-fourths of visitors were repeaters (73%) who averaged five trips to Lee County in the past five years.

Visitor Profile (cont'd)

- Half of winter 2017 paid accommodation guests said they were staying in condo/vacation home properties (49%), slightly fewer in hotel/motel/resort/B&B properties (46%), and only a small number in RV parks/campgrounds (6%). Nearly all reported that the quality of their lodging either *met their expectations* (61%) or *far exceeded/exceeded their expectations* (33%).
- Visitors enjoyed a variety of activities while visiting Lee County, with the most prevalent including: *beaches* (93% vs. 88% in 2016), *dining* (79% vs. 76% in 2016), *relaxing* (73% vs. 76% in 2016), and *shopping* (55% vs. 55% in 2016). Half of winter visitors took a day trip outside of Lee County (49%), fewer than last winter (55%). Those that did take a day trip outside of Lee County were most likely to visit Naples (33%).
- Winter visitors continued to be highly satisfied with their stay in Lee County, with nearly all visitors indicating they were either *very satisfied* (54% vs. 47% in 2016) or *satisfied* (40% vs. 44% in 2016). Furthermore, the majority of winter 2017 visitors indicated they will recommend Lee County to a friend over other areas in Florida (88% vs. 85% in 2016). Just as many intend to return to Lee County themselves (91% vs. 85% in 2016), with six in ten of them suggesting they will do so next year (62%).
- When asked what they liked least about the area, half cited *traffic* as a negative aspect encountered during their trip (54 vs. 52% in 2016), typical for the winter season. Emerging at lower levels overall, additional negative mentions include: *high prices* (11% on par with 2016), *beach seaweed* (8% vs. 7% in 2016), *insects* (7% on par with 2016), *water quality* (5% vs. 13% in 2016), *red tide* (5% vs. 13% in 2016), and *weather* (3% vs. 14% in 2016).
- The demographic composition of Winter 2017 visitors can be summarized as follows:
 - 56 years of age on average
 - \$99,859 household income on average
 - 74% married
 - 48% traveling as a couple
 - 21% traveling as a family
 - 87% traveling *without* children
 - 3 people in travel party on average

Lodging Industry Assessments

- For the Lee County lodging industry in total, both *available* room nights and *occupied* room nights showed an increase from winter 2016 to 2017 (3.2% and 2.6% respectively). RV parks/campgrounds experienced substantial growth in *available* and *occupied* room nights, while hotel/motel/resort properties posted a decline in both *available* and *occupied* room nights year-over-year (-1.6% and -3.8%). Condo/vacation homes showed no significant change in *available* (-0.1%) or *occupied* (+1.1%) roomnights.

Winter Season	Occupied Room Nights			Available Room Nights		
	2016	2017	% Change	2016	2017	% Change
Hotel/Motel/Resort/B&B	872,552	839,786	-3.8%	1,036,478	1,019,622	-1.6%
Condo/Cottage/Vacation Home	345,851	349,570	1.1%	385,707	385,433	-0.1%
RV Park/Campground	417,767	489,292	17.1%	438,650	514,890	17.4%
Total	1,636,170	1,678,648	2.6%	1,860,835	1,919,945	3.2%

- Consequently, the industry-wide average occupancy rate in Lee County decreased from 87.9% in winter 2016 to 87.4% in winter 2017 (-0.6%), fueled mostly by the decline observed in the hotel/motel/resort category (-2.2%).
- Lee County's average daily rate for the winter season declined 4.5% year-over-year. All three lodging categories experienced decreases in ADR when compared with last year.
- RevPAR decreased by 5.0% from winter 2016 to 2017, dampened by the drop in average daily rate. RevPAR decrease was most seen in the hotel/motel/resort (-3.9%) category.

Winter Season	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2016	2017	% Change	2016	2017	% Change	2016	2017	% Change
Hotel/Motel/Resort/B&B	84.2%	82.4%	-2.2%	\$207.21	\$203.55	-1.8%	\$174.44	\$167.65	-3.9%
Condo/Cottage/Vacation Home	89.7%	90.7%	1.1%	\$268.35	\$264.02	-1.6%	\$240.62	\$239.45	-0.5%
RV Park/Campground	95.2%	95.0%	-0.2%	\$67.01	\$66.17	-1.3%	\$63.82	\$62.88	-1.5%
AVERAGE	87.9%	87.4%	-0.6%	\$184.34	\$176.10	-4.5%	\$162.08	\$153.97	-5.0%

Lodging Industry Assessments (cont'd)

- According to reports from Lee County property managers, reservations for spring season 2017 (April, May, and June) suggest business will not be as strong as last spring. Three in ten responding managers mentioned their total reservations for the next three months are *up* over the same period last year (30% vs. 23% in 2016), and one-fourth said reservations are the *same* (26% vs. 38% in 2016). The remaining one-third claimed that their reservations are *down* (34%), compared with 33% saying the same in 2016.

Winter 2017 Lee County Snapshot

Total Visitation				
Winter Season	%		Visitor Estimates	
	2016	2017	2016	2017
Paid Accommodations	54%	55%	724,071	728,209
Friends/Relatives	46%	45%	<u>606,576</u>	<u>595,032</u>
Total Visitation			1,330,647	1,323,241

Visitor Origin - Visitors Staying in Paid Accommodations				
Winter Season	%		Visitor Estimates	
	2016	2017	2016	2017
Florida	2%	1%	9,460	4,657
United States	79%	82%	570,782	599,175
Canada	9%	12%	68,544	88,152
Germany	5%	2%	34,895	17,886
UK	5%	2%	34,895	12,776
Other International	2%	1%	14,955	10,220

Total Visitor Expenditures			
Winter Season	2016	2017	% Change
Total Visitor Expenditures	\$1,160,577,160	\$1,147,333,009	-1.1%
Paid Accommodations	\$859,414,065	\$851,964,885	-0.9%

First-Time/Repeat Visitors to Lee County		
Winter Season	2016	2017
First-time	28%	25%
Repeat	70%	73%

Winter Season	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2016	2017	% Change	2016	2017	% Change	2016	2017	% Change
Hotel/Motel/Resort/B&B	84.2%	82.4%	-2.2%	\$207.21	\$203.55	-1.8%	\$174.44	\$167.65	-3.9%
Condo/Cottage/Vacation Home	89.7%	90.7%	1.1%	\$268.35	\$264.02	-1.6%	\$240.62	\$239.45	-0.5%
RV Park/Campground	95.2%	95.0%	-0.2%	\$67.01	\$66.17	-1.3%	\$63.82	\$62.88	-1.5%
AVERAGE	87.9%	87.4%	-0.6%	\$184.34	\$176.10	-4.5%	\$162.08	\$153.97	-5.0%

Visitor Profile Analysis Winter 2017

A total of 947 interviews were conducted with visitors in Lee County during the winter months of January, February, and March 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 966 interviews were conducted with visitors in Lee County during the winter months of January, February, and March 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

Winter Season	Started Talking About Trip		Chose Lee County for Trip		Made Lodging Reservations*	
	2016 A	2017 B	2016 A	2017 B	2016 A	2017 B
Total Respondents	966	947	966	947	587*	581*
<u>Less than 3 months (NET)</u>	<u>29%</u>	<u>30%</u>	<u>32%</u>	<u>34%</u>	<u>32%</u>	<u>32%</u>
<1 month	4%	4%	7%	6%	7%	5%
1 month - <2 months	11%	11%	11%	13%	13%	14%
2 months - <3 months	14%	15%	14%	15%	11%	13%
<u>3 months or more (NET)</u>	<u>67%</u>	<u>67%</u>	<u>61%</u>	<u>61%</u>	<u>59%</u>	<u>58%</u>
3 months - <6 months	26%	28%	23%	25%	24%	25%
6 months - <1 year	21%	19%	19%	17%	22%	18%
A year or more	20%	20%	20%	19%	12%	14%
No Lodging Reservations Made	-	-	-	-	7%	7%
No Answer	3%	3%	6%	5%	2%	3%

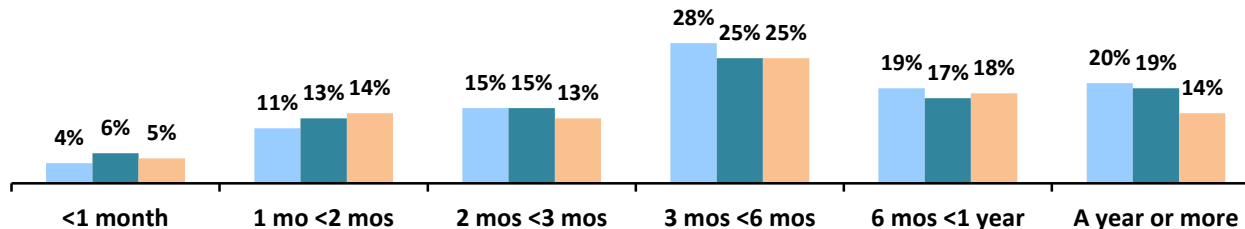
Q3a: When did you “start talking” about going on this trip?

Q3b: When did you choose Lee County for this trip?

Q3c: When did you make lodging reservations for this trip?

Winter 2017 Travel Planning

■ Started talking about trip ■ Chose Lee County for trip ■ Made lodging reservations*



* Base: Among those staying in paid accommodations

Travel Planning

Devices Used to Access Destination Planning Information		
	2016	2017
Winter Season	A	B
Total Respondents	966	947
<u>Any (NET)</u>	<u>96%</u>	<u>95%</u>
Laptop computer	59%	55%
Smartphone (iPhone, Blackberry, etc.)	54%	55%
Tablet (iPad, etc.)	44% ^b	41%
Desktop computer	41%	40%
E-Reader (Nook, Kindle, etc.)	3%	3%
Other portable device	2%	1%
None of these	4%	4%
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
Winter Season	A	B
Respondents who use devices to plan	923	903
<u>Visited web sites (net)</u>	<u>87%^b</u>	<u>83%</u>
Airline websites	40%	41%
Search Engines	28%	30%
Vacation rental websites	27%	26%
Hotel websites	21%	23%
Trip Advisor	24%	21%
Booking websites	24% ^b	20%
www.FortMyers-Sanibel.com	9%	8%
Visit Florida	10%	7%
AAA	9% ^b	6%
Facebook	8%	6%
Other	9%	8%
None/Didn't visit websites	12%	15% ^a
No Answer	2%	1%

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

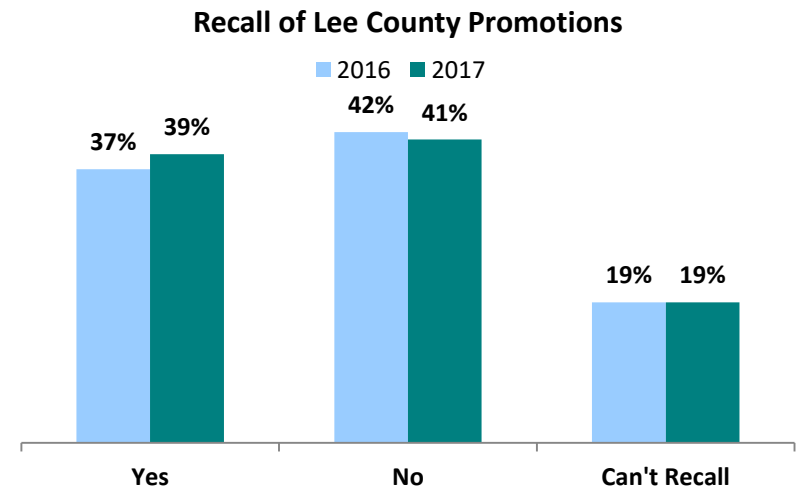
Travel Planning

Travel Information Requested		
	2016	2017
Winter Season	A	B
Total Respondents	966	947
<u>Requested information (NET)</u>	<u>26%</u>	<u>30%</u>
<i>Hotel website</i>	10%	14%a
<i>Call hotel</i>	5%	8%a
<i>VCB website</i>	6%	5%
<i>Visitor Guide</i>	3%	3%
<i>E-Newsletter</i>	1%	1%
<i>Call local Chamber of Commerce</i>	1%	1%
<i>Call VCB</i>	1%	<1%
<i>Magazine Reader Services Card</i>	1%	<1%
<i>Other</i>	9%	8%
<u>None/Did not request information</u>	<u>69%b</u>	<u>64%</u>
No Answer	5%	6%

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
Winter Season	A	B
Total Respondents	966	947
Yes	37%	39%
No	42%	41%
Can't Recall	19%	19%
No Answer	2%	1%

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



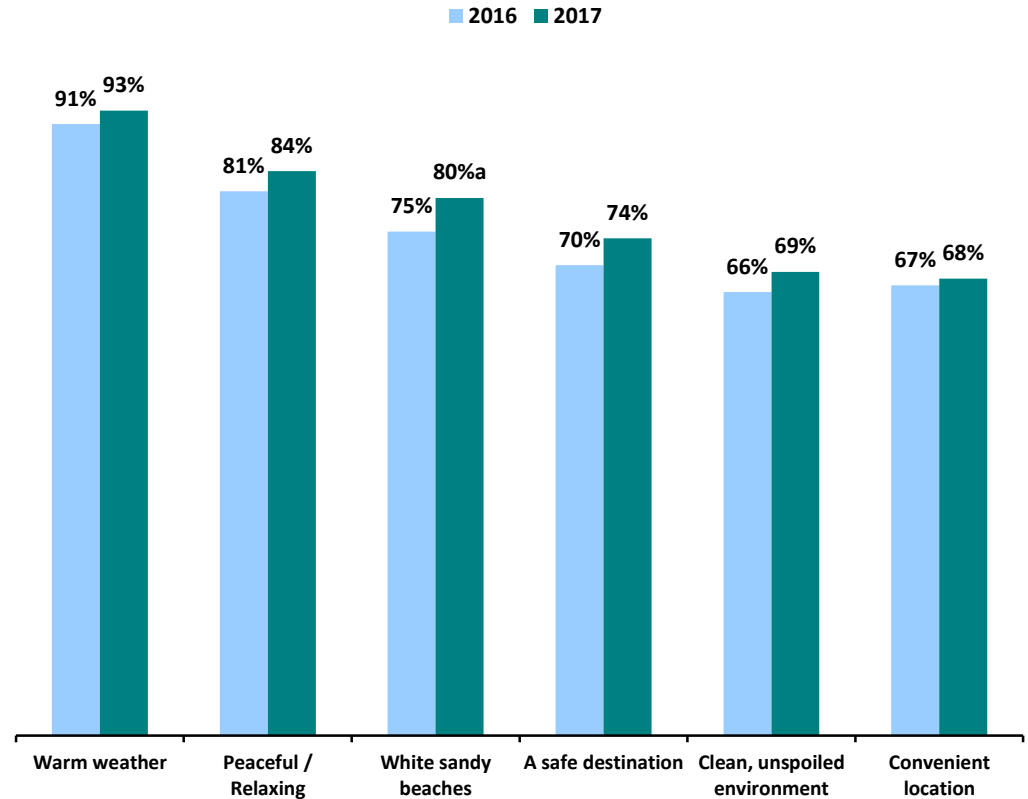
Travel Planning

Travel Decision Influences*		
Winter Season	2016	2017
	A	B
Total Respondents	966	947
Warm weather	91%	93%
Peaceful / Relaxing	81%	84%
White sandy beaches	75%	80%a
A safe destination	70%	74%
Clean, unspoiled environment	66%	69%
Convenient location	67%	68%
Plenty to see and do	62%	63%
Good value for the money	58%	61%
Affordable dining	52%	53%
Reasonably priced lodging	50%	50%
A "family" atmosphere	47%	46%
Upscale accommodations	43%	41%

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)

Top Travel Decisions Influences*



Trip Profile

Mode of Transportation		
Winter Season	2016	2017
	A	B
Total Respondents	966	947
Fly	67%	72%a
Drive A personal vehicle	27%b	23%
Drive A rental vehicle	4%	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)		
Winter Season	2016	2017
	A	B
Total Respondents	966	947
<u>One or more trips</u>	<u>60%</u>	<u>61%</u>
1 trip	42%	42%
2 to 3 trips	15%	15%
4 to 5 trips	2%	3%
6 or more trips	2%	2%
None/No Answer	40%	39%

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

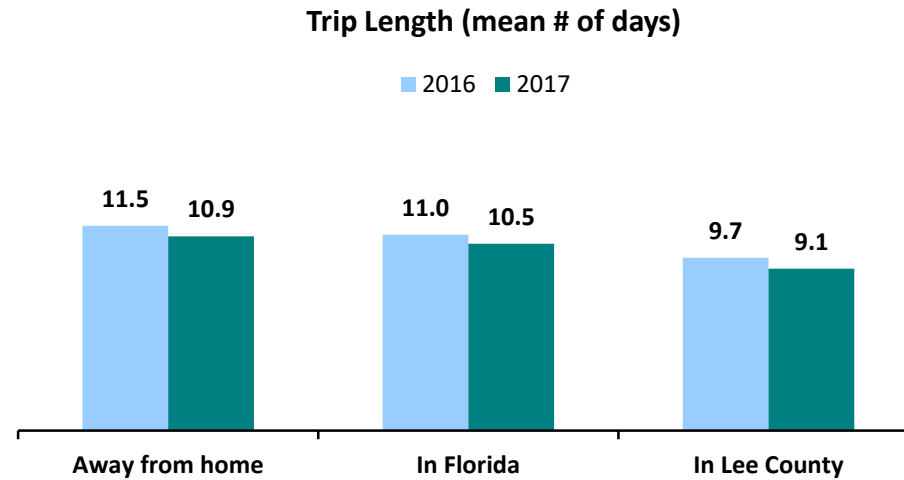
Airport Used		
Winter Season	2016	2017
	A	B
Respondents who flew	648	683
SW Florida Int'l (Fort Myers)	86%	85%
Punta Gorda	5%	6%
Tampa Int'l	3%	3%
Ft. Lauderdale Int'l	2%	2%
Orlando Int'l	1%	1%
Miami Int'l	1%	1%
Other/No Answer	1%	2%

Q2: At which Florida airport did you land?

Trip Profile

Trip Length Mean # of Days		
Winter Season	2016	2017
	A	B
Total Respondents	966	947
Away from home	11.5	10.9
In Florida	11.0	10.5
In Lee County	9.7	9.1

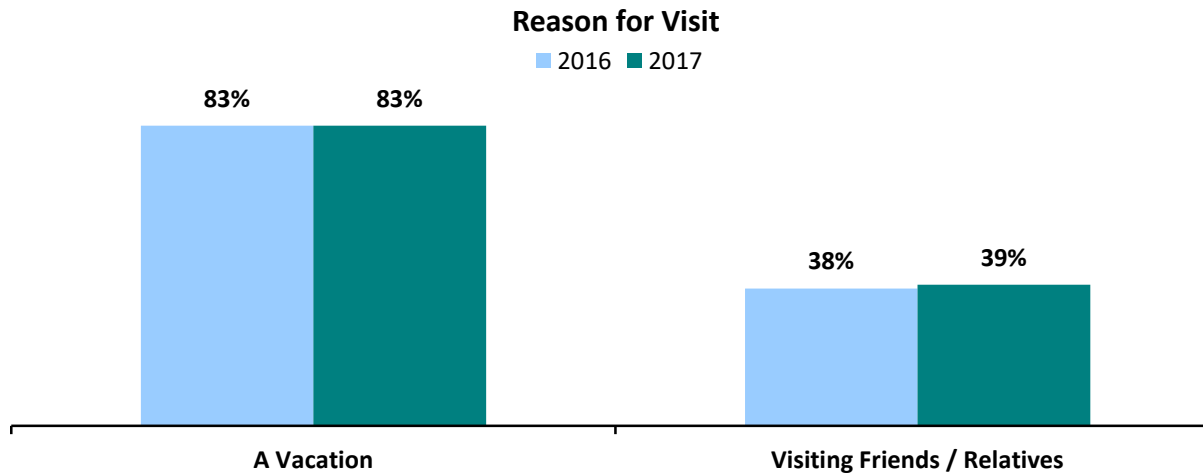
Q4a/b/c: On this trip, how many days will you be:



Trip Profile

Reason(s) for Visit		
Winter Season	2016	2017
	A	B
Total Respondents	966	947
A Vacation	83%	83%
Visiting Friends/Relatives	38%	39%
Sporting Event(s)	5%	4%
Personal Business	2%	1%
Other Business Trip	1%	1%
A Conference/Meeting	1%	1%
A Convention /Trade Show	-	<1%
Other/No Answer (NET)	4%	4%

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



Trip Profile

First Time Visitors to Lee County								
Winter Season	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	966	947	10**	8**	595	609	189	149
First-time visitor	28%	25%	N/A	N/A	22%	21%	53%b	38%
Repeat visitor	70%	73%	N/A	N/A	77%	78%	44%	58%b
No Answer	2%	2%	N/A	N/A	1%	1%	3%	4%

Q15: Is this your first visit to Lee County?

*Note: Small sample size (N<70). Please interpret results with caution.

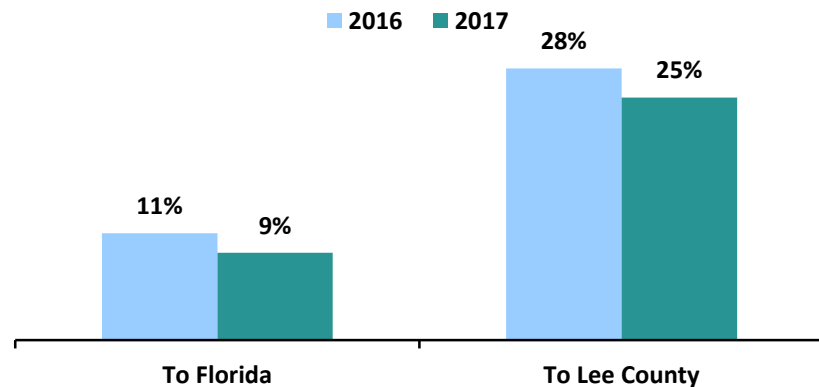
**N/A: Insufficient number of responses for statistical analysis (N<30).

First Time Visitors to Florida		
Winter Season	2016	2017
Total Respondents	966	947
	A	B
Yes, first-time visitor	11%	9%
No	86%	89%
No answer	2%	2%
<i>FL Residents*</i>	1%	1%

Q13: Is this your first visit to Florida?

*Florida residents are shown as a proportion of total visitor interviews conducted, though FL residents are not asked this question.

First Time Visitors



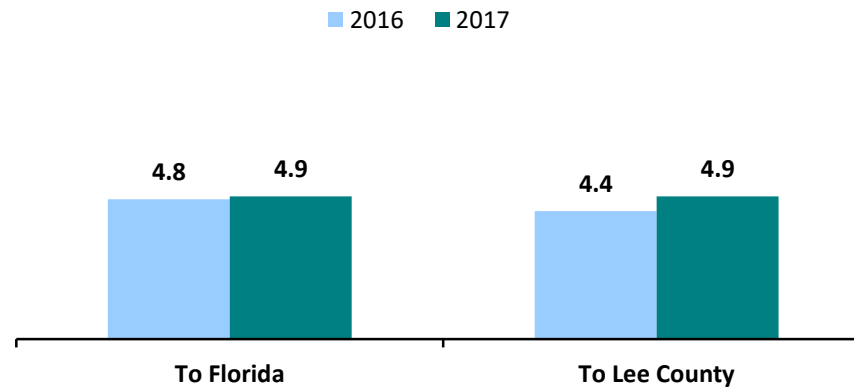
Trip Profile

Previous Visits in Five Years				
Winter Season	Mean # of Visits to Florida		Mean # of Visits to Lee County	
	2016	2017	2016	2017
	A	B	A	B
Base: Repeat Visitors	832 (FL res. Excl)	842 (FL res. Excl)	675	694
Number of visits	4.8	4.9	4.4	4.9

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?

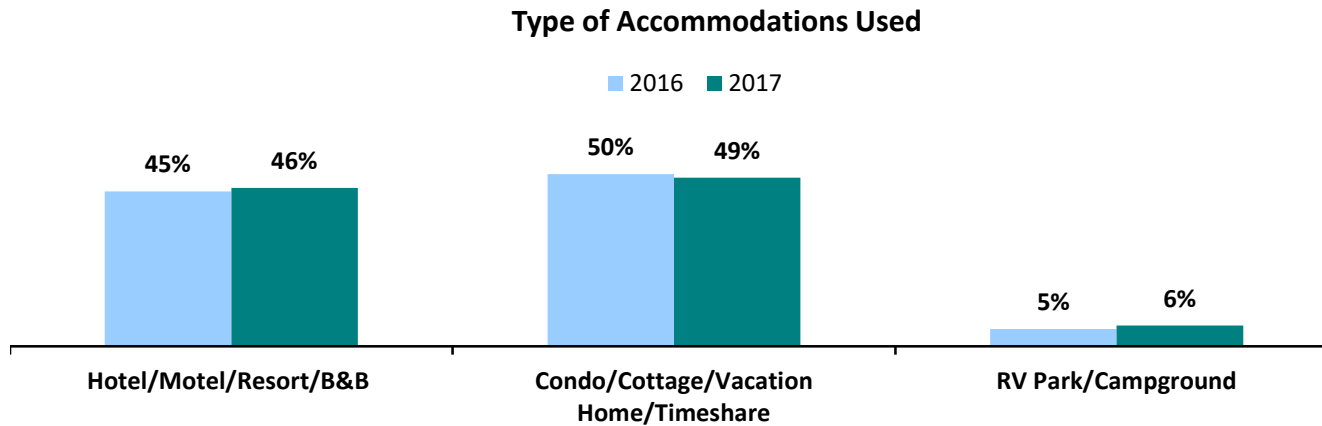
Previous Visits in Five Years



Trip Profile

Type of Accommodations Used		
Winter Season	2016	2017
	A	B
Total respondents staying in paid accommodations	587	581
Hotel/Motel/Resort/B&B (NET)	45%	46%
At a hotel/motel/historic inn	29%	28%
At a resort	15%	17%
At a Bed and Breakfast	1%	<1%
Condo/Cottage/Vacation Home/Timeshare (NET)	50%	49%
RV Park/Campground (NET)	5%	6%

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



Trip Profile

Quality of Accommodations		
Winter Season	2016	2017
	A	B
Total respondents staying in paid accommodations	587	581
Far exceeded/Exceeded expectations	33%	34%
Met your expectations	61%	60%
Did not meet/Far below expectations	5%	3%
No Answer	2%	3%

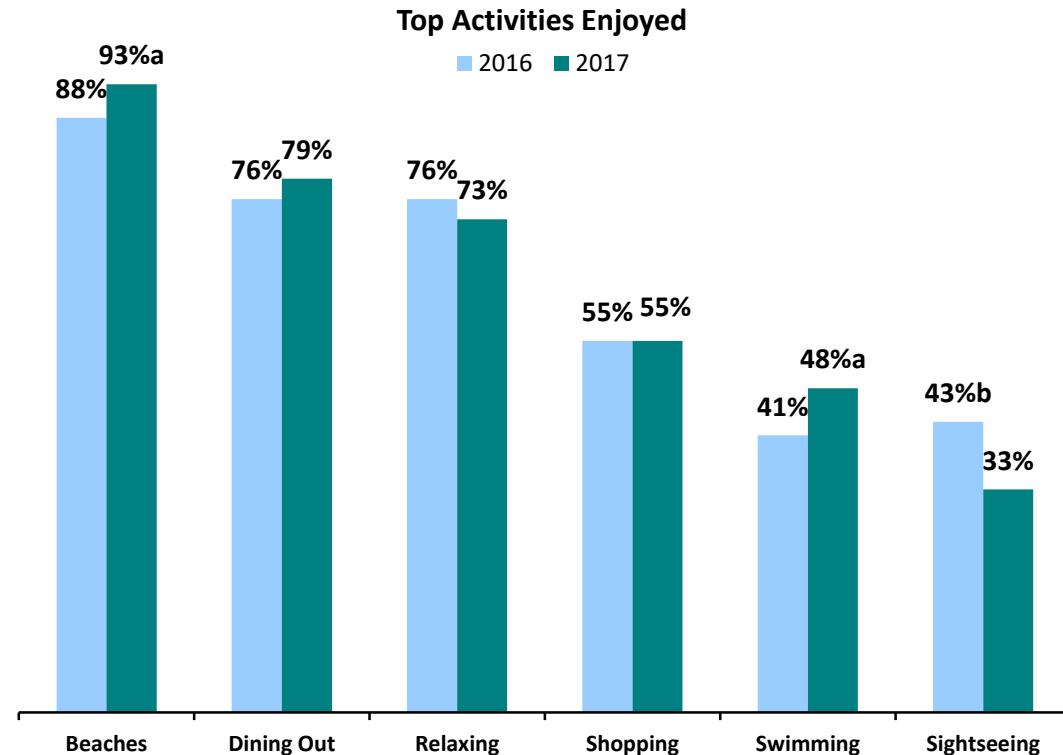
Q21: How would you describe the quality of your accommodations? Do you feel they:

Ratings by Subgroup								
Winter Season	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	186	150	389	423	458	469	123	101
Far exceeded/Exceeded expectations	30%	29%	35%	36%	36%	37%	20%	22%
Met your expectations	62%	62%	60%	59%	58%	57%	73%	71%
Did not meet/Far below expectations	5% ^b	1%	4%	4%	5%	4%	5%	1%
No Answer	3%	8% ^a	1%	1%	2%	2%	2%	6%

Trip Activities

Activities Enjoyed		
Winter Season	2016	2017
	A	B
Total Respondents	966	947
Beaches	88%	93%a
Dining Out	76%	79%
Relaxing	76%	73%
Shopping	55%	55%
Swimming	41%	48%a
Visiting Friends/Relatives	43%	42%
Sightseeing	43%b	33%
Shelling	33%	33%
Watching Wildlife	28%b	23%
Bicycle Riding	24%	23%
Exercise/Working Out	27%b	20%
Golfing	19%	19%
Attractions	25%b	18%
Bars/Nightlife	12%	16%a
Birdwatching	19%b	14%
Boating	10%	13%a
Photography	19%b	13%
Sporting Event	10%	11%
Fishing	9%	11%
Kayaking / Canoeing	8%	8%
Cultural Events	7%	6%
Miniature Golf	10%b	5%
Guided Tour	6%	5%
Tennis	4%	3%
Parasailing/Jet Skiing	3%	3%
Scuba Diving/Snorkeling	1%	2%
Other	5%	4%
No Answer	1%	1%

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

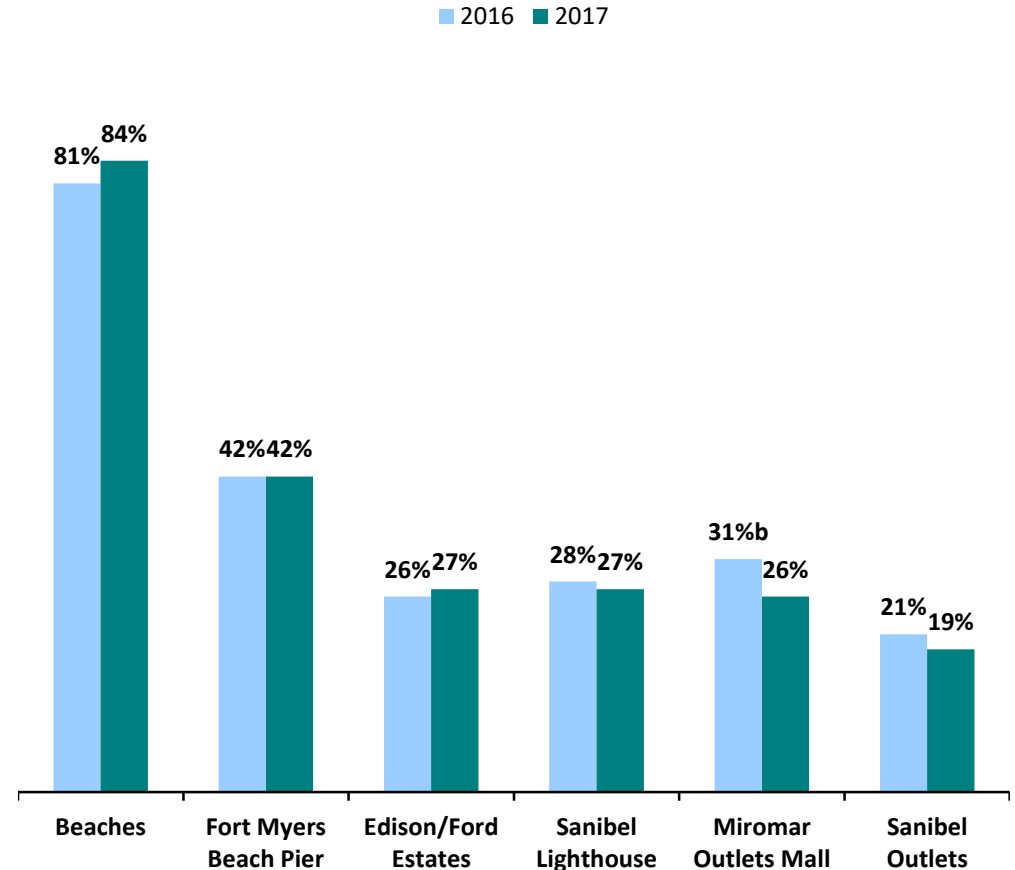


Trip Activities

Attractions Visited		
Winter Season	2016	2017
	A	B
Total Respondents	966	947
Beaches	81%	84%
Fort Myers Beach Pier	42%	42%
Edison/Ford Estates	26%	27%
Sanibel Lighthouse	28%	27%
Miromar Outlets Mall	31% ^b	26%
Sanibel Outlets	21%	19%
Ding Darling National Wildlife Refuge	18%	16%
Bell Tower Shops	14%	12%
Shell Factory and Nature Park	11%	11%
Periwinkle Place	11%	10%
Coconut Point Mall	11%	9%
Gulf Coast Town Center	12% ^b	9%
Manatee Park	10% ^b	7%
Edison Mall	8% ^b	6%
Bailey-Matthews Shell Museum	3%	5% ^a
Babcock Wilderness Adventures	1%	4% ^a
Broadway Palm Dinner Theater	2%	3%
Barbara B. Mann Performing Arts Hall	2%	2%
Other	8%	7%
None/No Answer (NET)	6%	6%

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

Top Attractions Visited



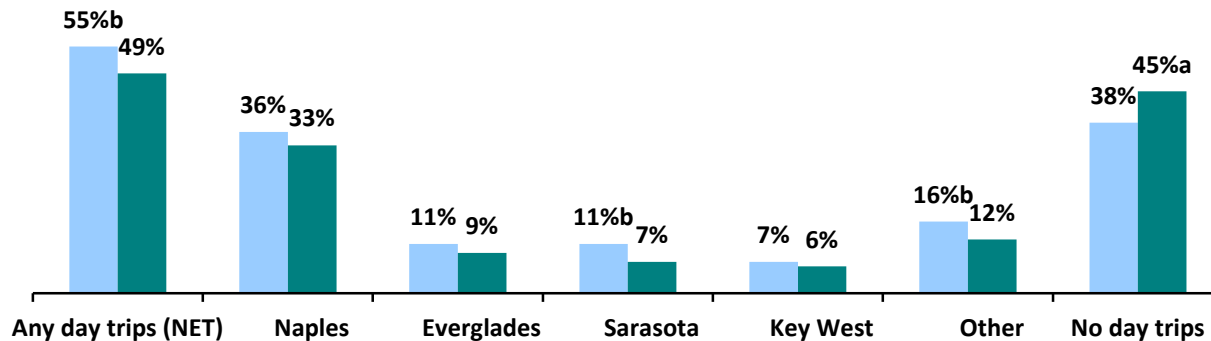
Trip Activities

Day Trips Outside Lee County		
Winter Season	2016	2017
	A	B
Total Respondents	966	947
<u>Any day trips (NET)</u>	<u>55%^b</u>	<u>49%</u>
<i>Naples</i>	36%	33%
<i>Everglades</i>	11%	9%
<i>Sarasota</i>	11% ^b	7%
<i>Key West</i>	7%	6%
<i>Other</i>	16% ^b	12%
<u>No day trips</u>	<u>38%</u>	<u>45%^a</u>
No Answer	16%	13%

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

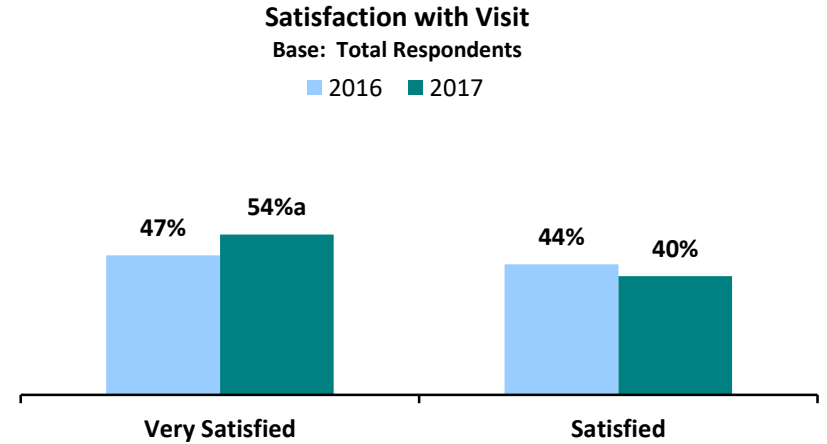
Day Trips Outside Lee County

■ 2016 ■ 2017



Lee County Experience

Satisfaction with Visit		
	Total Respondents	
Winter Season	2016	2017
	A	B
Total Respondents	966	947
<u>Very Satisfied/Satisfied</u>	<u>92%</u>	<u>94%a</u>
<i>Very Satisfied</i>	47%	54%a
<i>Satisfied</i>	44%	40%
Neither	2%	1%
Dissatisfied/Very Dissatisfied	1%b	<1%
Don't know/no answer	5%	4%



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

Ratings by Subgroup								
	First-Timers		Repeaters		U.S. Residents		International Residents	
Winter Season	2016	2017	2016	2017	2016	2017	2016	2017
	A	B	A	B	A	B	A	B
Total Respondents	272	237	675	694	766	781	189	149
<u>Very Satisfied/Satisfied</u>	<u>88%</u>	<u>94%a</u>	<u>93%</u>	<u>95%</u>	<u>92%</u>	<u>95%</u>	<u>92%</u>	<u>93%</u>
<i>Very Satisfied</i>	30%	39%a	55%	60%	51%	58%a	34%	38%
<i>Satisfied</i>	58%	55%	38%	35%	41%	37%	58%	55%

Future Plans

Likelihood to Recommend/Return to Lee County		
Winter Season	2016	2017
	A	B
Total Respondents	966	947
Likely to Recommend Lee County	85%	88%a
Likely to Return to Lee County	85%	91%a
Base: Total Respondents Planning to Return	824	860
Likely to Return Next Year	60%	62%

Q27: Would you recommend Lee County to A friend over other vacation areas in Florida?

Q31: Will you come back to Lee County?

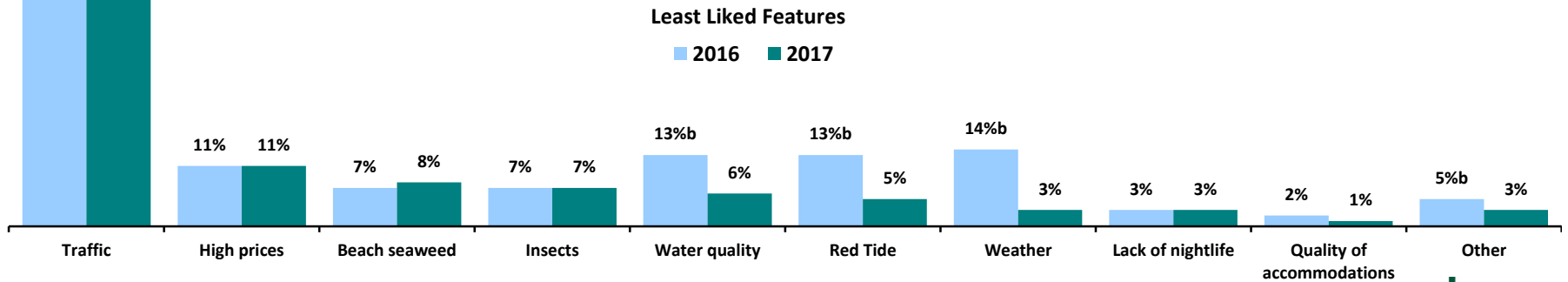
Q32: Will you come back next year?

Ratings by Subgroup								
Winter Season	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	272	237	675	694	766	781	189	149
Likely to Recommend Lee County	78%	84%	87%	89%	84%	88%a	86%	91%
Likely to Return to Lee County	70%	84%a	92%	93%	87%	91%a	78%	90%a
Base: Total Respondents Planning to Return	190	199	620	647	666	714	149	134
Likely to Return Next Year	34%	34%	69%	71%	61%	63%	57%	59%

Trip Activities

Least Liked Features		
Winter Season	2016	2017
	A	B
Total Respondents	966	947
Traffic	52%	54%
High prices	11%	11%
Beach seaweed	7%	8%
Insects	7%	7%
Water quality	13% ^b	6%
Red Tide	13% ^b	5%
Weather	14% ^b	3%
Lack of nightlife	3%	3%
Quality of accommodations	2%	1%
Other	5% ^b	3%
Nothing/No Answer (NET)	24%	29% ^a

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

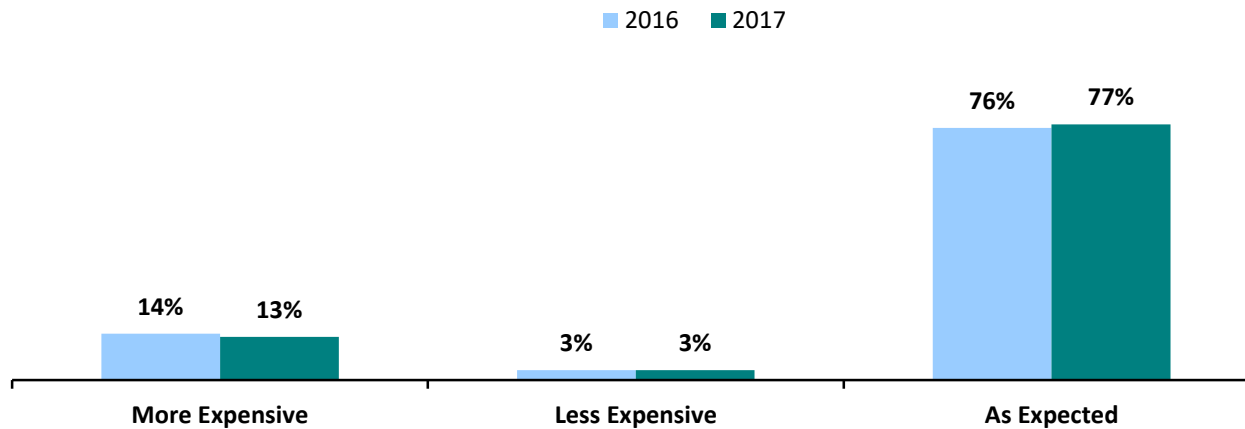


Trip Activities

Perception of Lee County as Expensive		
Winter Season	2016	2017
	A	B
Total Respondents	966	947
More Expensive	14%	13%
Less Expensive	3%	3%
As Expected	76%	77%
Don't know/No Answer (NET)	7%	7%

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		
Winter Season	2016	2017
	A	B
Total Respondents	966	947
Age of respondent (mean)	55.4	55.7
Annual household income (mean)	\$101,171	\$99,859
<u>Martial Status</u>		
Married	75%	74%
Single	12%	11%
Other	11%	12%
Vacations per year (mean)	3.0	3.0
Short getaways per year (mean)	4.0	4.0

Q37: What is your age, please?

Q39: What is your total annual household income before taxes?

Q36: Are you: Married/Single/Other

Q33: How many vacations, lasting FIVE (5) OR MORE NIGHTS AWAY FROM HOME, do you take in an average year?

Q34: And how many short getaway trips lasting AT LEAST (1) BUT NOT MORE THAN FOUR (4) NIGHTS AWAY FROM HOME, do you take in an average year?

Travel Party		
Winter Season	2016	2017
	A	B
Total Respondents	966	947
Couple	50%	48%
Family	23%	21%
Group of couples/friends	16%	15%
Single	8%	10%
Mean travel party size	2.8	2.7
Mean adults in travel party	2.5	2.4

Q17: On this trip, are you traveling:

Q18: Including yourself, how many people are in your immediate travel party?

Travel Parties with Children		
Winter Season	2016	2017
	A	B
Total Respondents	966	947
<u>Traveling with any Children (net)</u>	<u>14%</u>	<u>13%</u>
Any younger than 6	7%	6%
Any ages 6-11	6%	6%
Any 12-17 years old	6%	5%
No Children	86%	87%

Q19: How many of those people are:

Younger than 6 years old/ 6-11 years old/ 12-17 years old/ Adults

Visitor Origin and Visitation Estimates

Total Visitation					
	%		Visitor Estimates		
Winter Season	2016	2017	2016	2017	% Change
Paid Accommodations	54%	55%	724,071	728,209	0.6%
Friends/Relatives	46%	45%	606,576	595,032	-1.9%
Total Visitation			1,330,647	1,323,241	-0.6%

Visitors Staying in Paid Accommodations					
	%		Visitor Estimates		Direction of Change
Winter Season	2016	2017	2016	2017	
Country of Origin					
United States	79%	82%	570,782	599,175	+
Canada	9%	12%	68,544	88,152	+
Germany	5%	2%	34,895	17,886	-
UK	5%	2%	34,895	12,776	-
Scandinavia	1%	1%	7,477	6,388	-
BeNeLux	<1%	<1%	2,492	1,278	-
Switzerland	<1%	<1%	1,246	1,278	+
Latin America	<1%	<1%	1,246	-	-
Other International	<1%	<1%	2,492	1,278	-

U.S. Region of Origin	2016	2017	2016	2017	Direction of Change
Florida	2%	1%	9,460	4,657	-
South (including Florida)	15%	13%	86,721	79,166	-
Midwest	59%	52%	337,424	312,006	-
Northeast	22%	30%	126,140	180,063	+
West	4%	4%	20,498	23,284	+

Winter 2017 Top DMAs (Paid Accommodations)		
Minneapolis-Saint Paul	9%	54,329
Boston (Manchester, NH)	7%	43,464
New York	6%	37,254
Chicago	6%	37,254
Indianapolis	4%	21,732
Philadelphia	3%	18,627
Detroit	3%	17,075
Saint Louis	3%	15,523
Hartford-New Haven	3%	15,523
Cleveland-Akron (Canton)	2%	13,970

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 Winter 2017

For the 2017 winter season, property managers were interviewed in April 2017 to provide data for each specific month of the season (January, February, and March 2017).

For the 2016 winter season, property managers were interviewed in April 2016 to provide data for each specific month of the season (January, February, and March 2016).

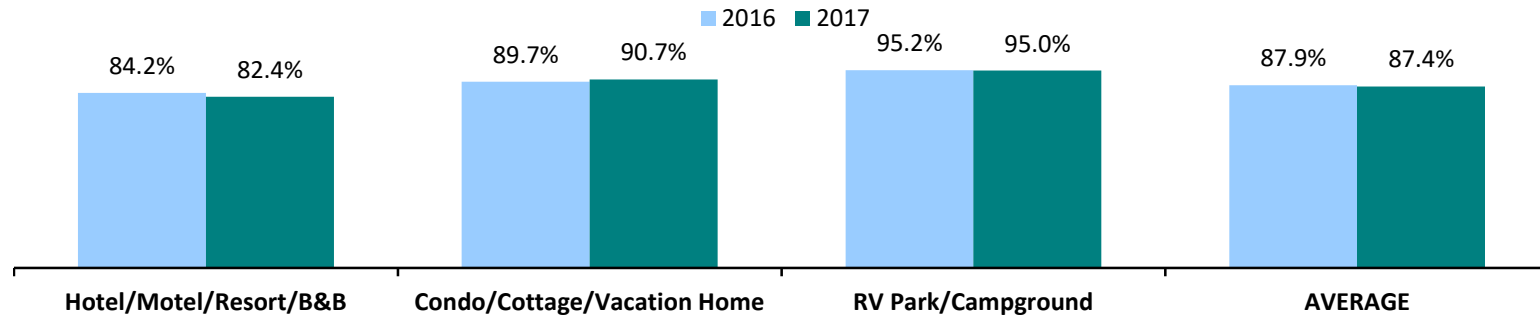
Occupancy/Daily Rates

	Average Occupancy Rate			Average Daily Rate			RevPAR		
Winter Season	2016	2017	% Change	2016	2017	% Change	2016	2017	% Change
Hotel/Motel/Resort/B&B	84.2%	82.4%	-2.2%	\$207.21	\$203.55	-1.8%	\$174.44	\$167.65	-3.9%
Condo/Cottage/Vacation Home	89.7%	90.7%	1.1%	\$268.35	\$264.02	-1.6%	\$240.62	\$239.45	-0.5%
RV Park/Campground	95.2%	95.0%	-0.2%	\$67.01	\$66.17	-1.3%	\$63.82	\$62.88	-1.5%
AVERAGE	87.9%	87.4%	-0.6%	\$184.34	\$176.10	-4.5%	\$162.08	\$153.97	-5.0%

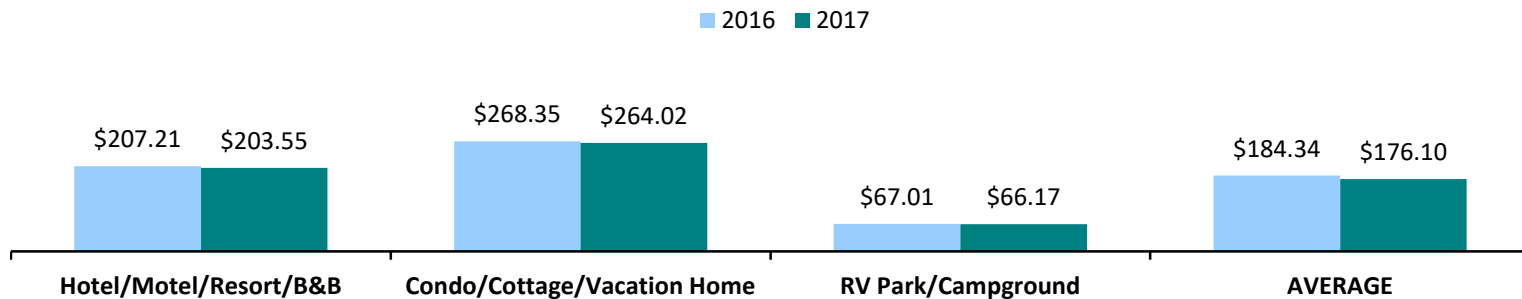
Q16: What was your overall average occupancy rate for the month of [January/February/March]?

Q17: What was your average daily rate (ADR) in [January/February/March]?

Average Occupancy Rate

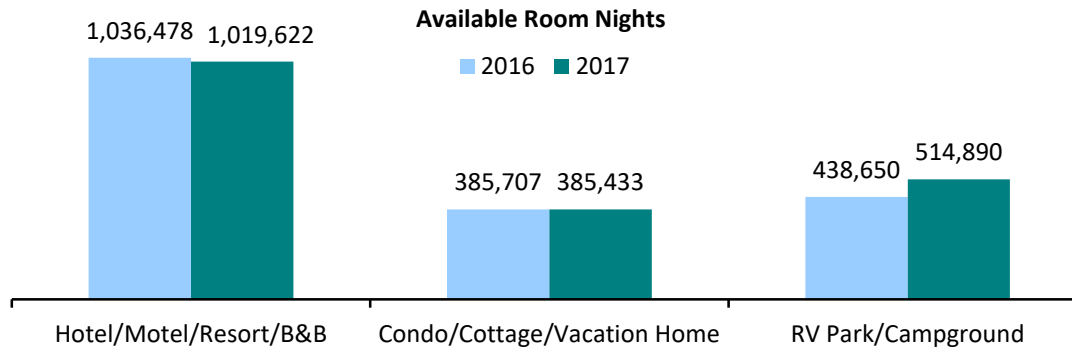
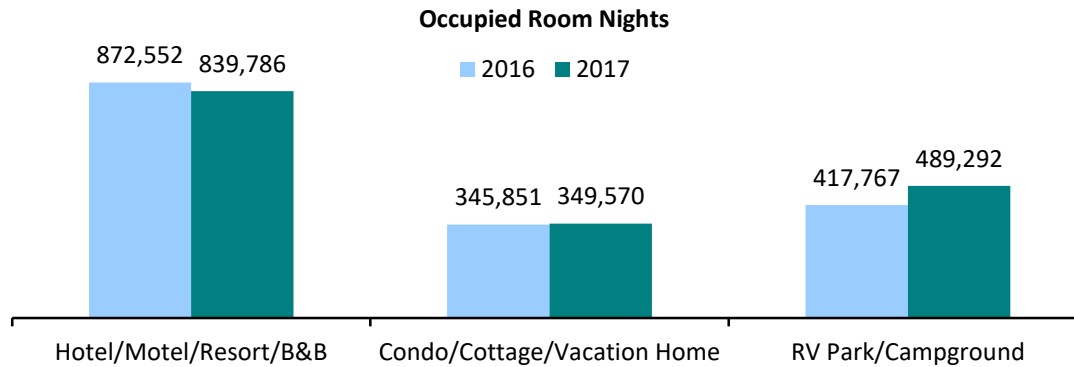


Average Daily Rate



Room/Unit/Site Nights

Winter Season	Occupied Room Nights			Available Room Nights		
	2016	2017	% Change	2016	2017	% Change
Hotel/Motel/Resort/B&B	872,552	839,786	-3.8%	1,036,478	1,019,622	-1.6%
Condo/Cottage/Vacation Home	345,851	349,570	1.1%	385,707	385,433	-0.1%
RV Park/Campground	417,767	489,292	17.1%	438,650	514,890	17.4%
Total	1,636,170	1,678,648	2.6%	1,860,835	1,919,945	3.2%



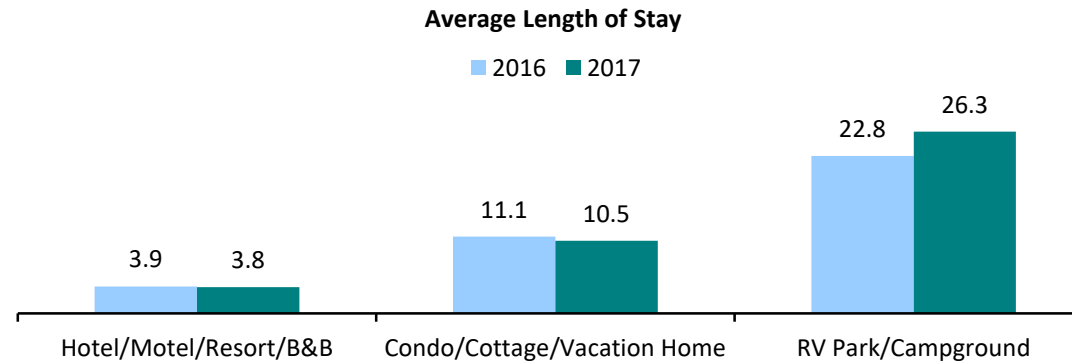
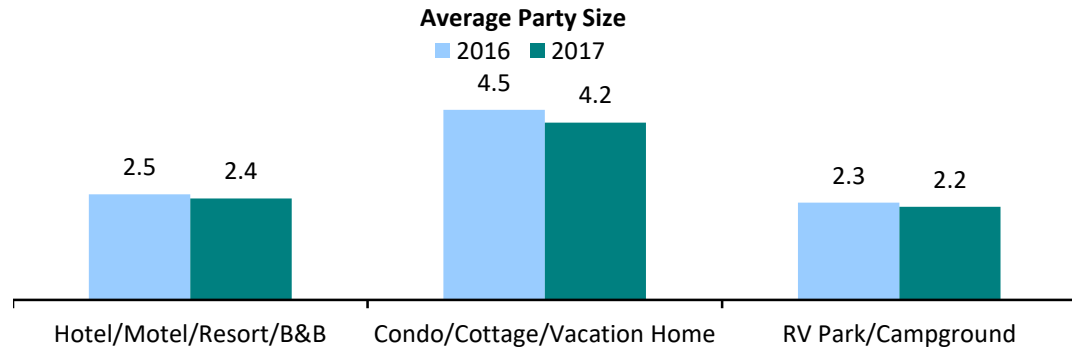
Average Party Size and Length of Stay

Winter Season	Average Party Size			Average Length of Stay		
	2016	2017	% Change	2016	2017	% Change
Hotel/Motel/Resort/B&B	2.5	2.4	-0.3%	3.9	3.8	-4.4%
Condo/Cottage/Vacation Home	4.5	4.2	-5.5%	11.1	10.5	-6.0%
RV Park/Campground	2.3	2.2	-2.2%	22.8	26.3	15.2%
Average	2.8	2.8	-2.9%	6.4	6.3	-1.0%

Q18: What was your average number of guests per room/site/unit in [January/February/March]?

Q19: What was the average length of stay (in nights) of your guests in [January/February/March]?

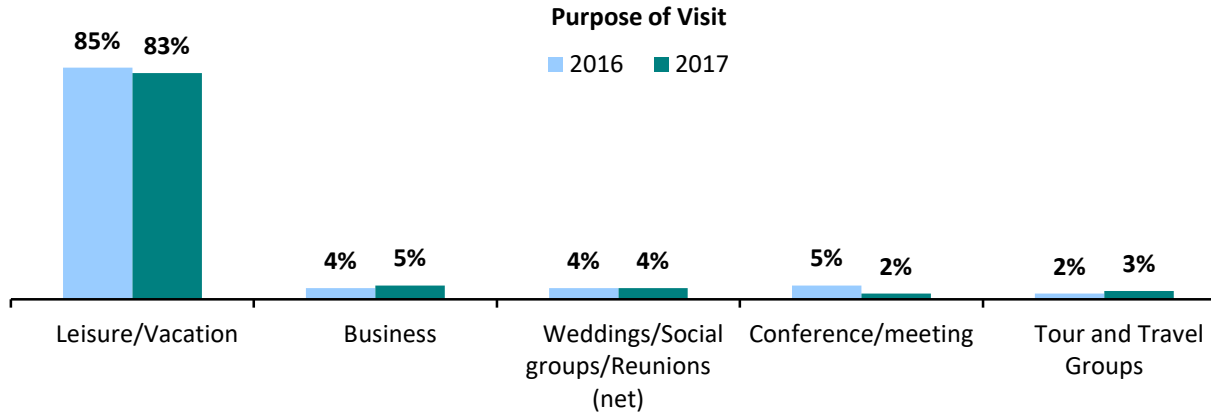
Note: Year-over-year percent change is calculated using unrounded figures for estimated average party size and length of stay.



Lodging Management Estimates

Guest Profile		
Winter Season	2016	2017
	A	B
Total Number of Responses	105	95
<u>Purpose of Visit</u>		
Leisure/Vacation	85%	83%
Business	4%	5%
Weddings/Social groups/Reunions (net)	4%	4%
Conference/meeting	5%	2%
Tour and Travel Groups	2%	3%

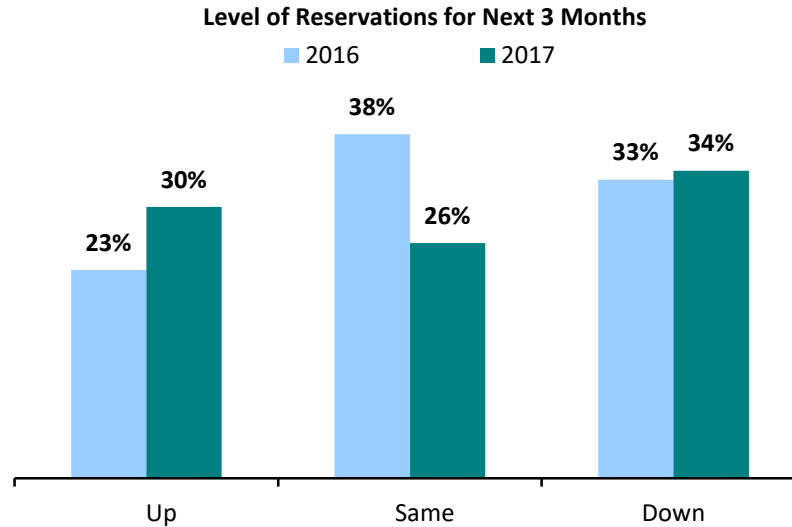
Q22: What percent of your [January/February/March] room/site/unit occupancy do you estimate was generated by:



Occupancy Barometer

Level of Reservations for Next 3 Months Compared to Last Year		
Winter Season	2016	2017
	A	B
Total Respondents	112	102
<u>Up/Same (net)</u>	<u>61%</u>	<u>57%</u>
Up	23%	30%
Same	38%	26%
Down	33%	34%

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



Economic Impact Analysis
Winter 2017

Total Visitor Expenditures by Spending Category

TOTAL EXPENDITURES			
Winter Season	2016	2017	% Change
<u>TOTAL</u>	<u>\$1,160,577,160</u>	<u>\$1,147,333,009</u>	<u>-1.1%</u>
Lodging Accommodations	\$301,608,801	\$295,609,129	-2.0%
Food and Beverages	\$287,503,997	\$284,241,729	-1.1%
Shopping	\$267,513,708	\$264,488,548	-1.1%
Ground Transportation	\$104,901,612	\$101,228,351	-3.5%
Other	\$199,049,042	\$201,765,252	1.4%

(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 Paid Accommodations			Visiting Friends and Relatives/Day Trippers		
Winter Season	2016	2017	% Change	2016	2017	% Change
<u>TOTAL</u>	<u>\$859,414,065</u>	<u>\$851,964,885</u>	<u>-0.9%</u>	<u>\$301,163,095</u>	<u>\$295,368,124</u>	<u>-1.9%</u>
Lodging Accommodations	\$301,608,801	\$295,609,129	-2.0%	\$0	\$0	-
Food and Beverages	\$183,035,704	\$182,405,292	-0.3%	\$104,468,293	\$101,836,437	-2.5%
Shopping	\$171,428,766	\$170,705,865	-0.4%	\$96,084,942	\$93,782,683	-2.4%
Ground Transportation	\$73,189,241	\$71,117,286	-2.8%	\$31,712,371	\$30,111,065	-5.0%
Other	\$130,151,553	\$132,127,313	1.5%	\$68,897,489	\$69,637,939	1.1%

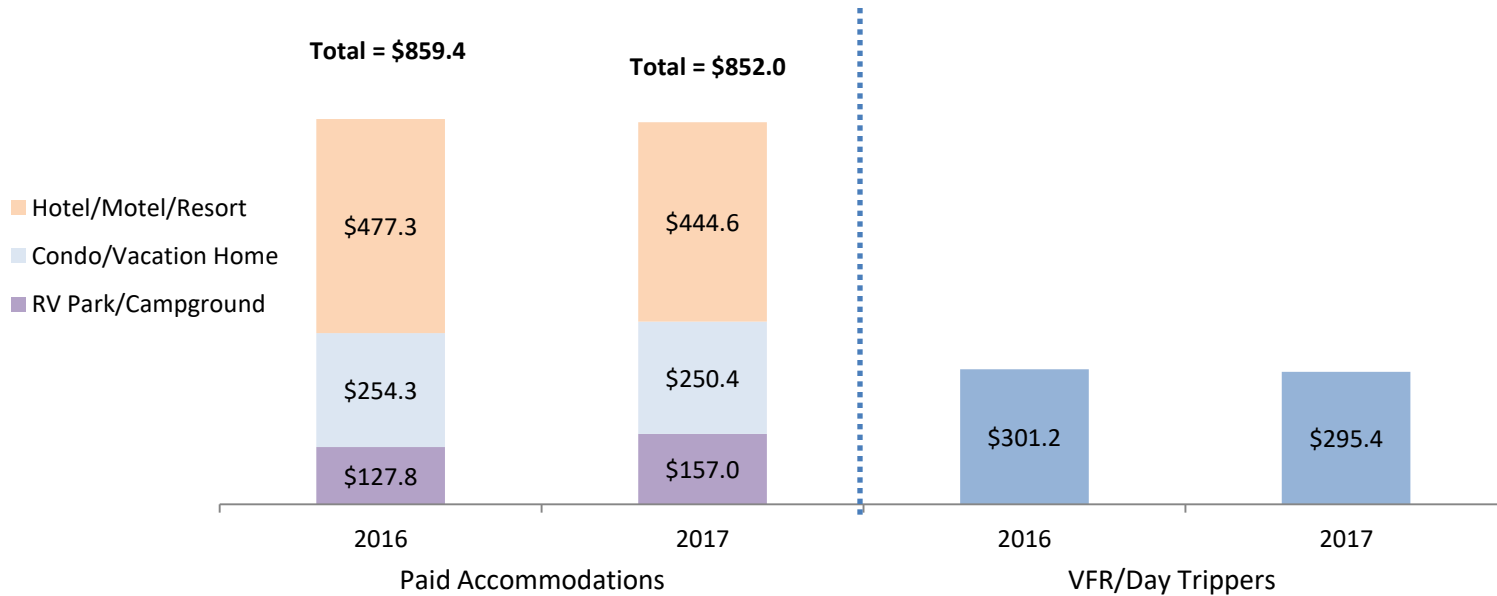
“Other ” includes the following categories:

- 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					
Winter Season	2016	2017	% Change	2016	2017
<u>TOTAL</u>	<u>\$1,160,577,160</u>	<u>\$1,147,333,009</u>	<u>-1.1%</u>	<u>100%</u>	<u>100%</u>
Visiting Friends & Relatives/Day Trippers	\$301,163,095	\$295,368,124	-1.9%	26%	26%
<u>Paid Accommodations</u>	<u>\$859,414,065</u>	<u>\$851,964,885</u>	<u>-0.9%</u>	<u>74%</u>	<u>74%</u>
<i>Hotel/Motel/Resort/B&B</i>	\$477,308,860	\$444,581,992	-6.9%	41%	39%
<i>Condo/Cottage/Vacation Home</i>	\$254,277,624	\$250,376,398	-1.5%	22%	22%
<i>RV Park/Campground</i>	\$127,827,581	\$157,006,495	22.8%	11%	14%

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.

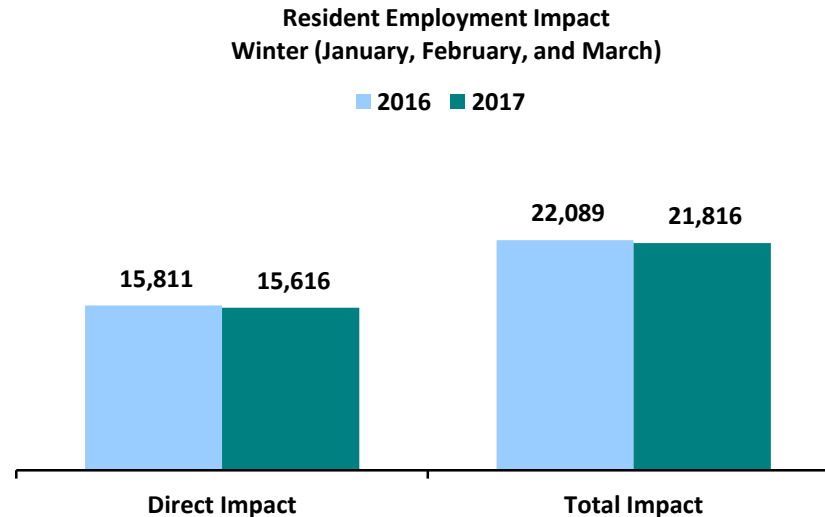
Impact on Jobs for Lee County Residents

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.).



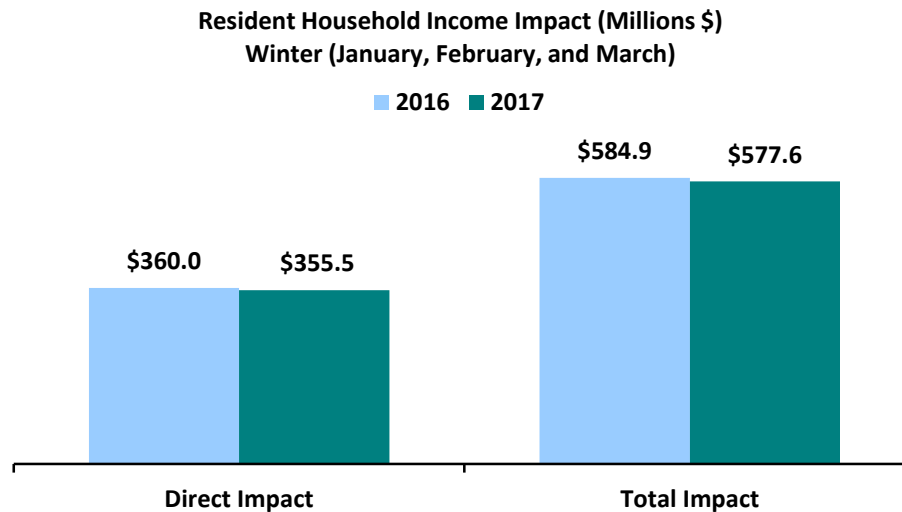
Impact on Household Income for Lee County Residents

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.

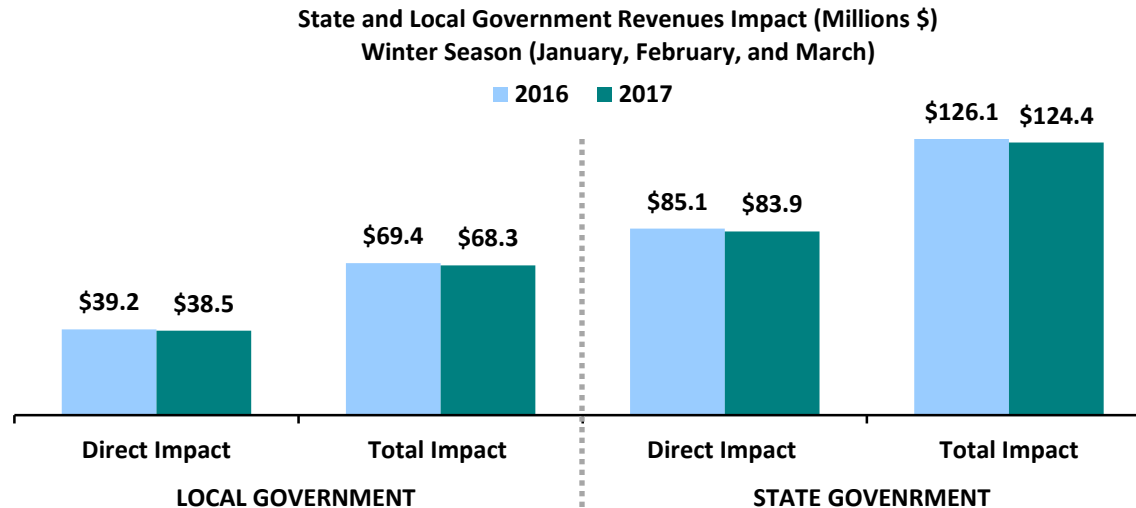
The gross government revenues accruing to governments as a result of producing the output purchased with visitor expenditures is the government revenue impact.

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).



Appendix
Winter 2017

January 2017 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Sanibel	Lighthouse Beach	1/5/17	19
Sanibel	Sanibel Inn	1/5/17	11
Sanibel	Song of the Sea	1/5/17	6
Fort Myers	RSW Airport	1/7/17	30
Fort Myers Beach	Neptune Inn	1/10/17	8
Fort Myers Beach	DiamondHead Resort	1/10/17	6
Fort Myers Beach	Estero Island Beach Club	1/10/17	8
Fort Myers Beach	The Pier	1/10/17	18
Fort Myers	Edison & Ford Winter Estates	1/11/17	18
Fort Myers	Centennial Park	1/15/17	7
Fort Myers	Edison & Ford Winter Estates	1/18/17	20
Sanibel	Song of the Sea	1/19/17	7
Sanibel	Loggerhead Cay	1/19/17	6
Sanibel	Sanibel Arms West	1/19/17	7
Sanibel	Holiday Inn Sanibel Island	1/19/17	12
Fort Myers Beach	Bel-Air	1/24/17	5
Fort Myers Beach	Cane Palm	1/24/17	6
Fort Myers Beach	Best Western PLUS Beach Resort	1/24/17	8
Fort Myers Beach	Times Square	1/24/17	10
Fort Myers	Edison Estates	1/27/17	19
Fort Myers	RSW - Airport	1/28/17	32
Bonita Springs	Bonita Beach Park	1/30/17	30
Fort Myers	Miromar Outlets	1/31/17	18
Total			311

February 2017 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Bonita Springs	Bonita Beach	2/3/17	29
Fort Myers	Art Fest @ Centennial Park	2/4/17	8
Fort Myers	Edison & Ford Winter Estates	2/8/17	18
Fort Myers	RSW Airport	2/11/17	33
Fort Myers Beach	The Pier	2/14/17	19
Fort Myers Beach	DiamondHead Resort	2/14/17	8
Fort Myers Beach	Estero Island Beach Club	2/14/17	7
Sanibel	Casa Ybel	2/16/17	7
Sanibel	Sanibel Inn	2/16/17	11
Sanibel	Pointe Santo	2/16/17	7
Fort Myers	Edison & Ford Winter Estates	2/17/17	20
Fort Myers Beach	Times Square	2/22/17	10
Fort Myers Beach	Windward Passage	2/22/17	6
Fort Myers Beach	Bel-Air	2/22/17	6
Fort Myers Beach	Best Western PLUS Beach Resort	2/22/17	8
Fort Myers Beach	Neptune Inn	2/22/17	6
Sanibel	Sanibel Surfside	2/23/17	9
Sanibel	Lighthouse Beach	2/23/17	15
Sanibel	Pelican Roost	2/23/17	6
Sanibel	Holiday Inn Sanibel Island	2/23/17	11
Fort Myers	RSW Airport	2/25/17	34
Cape Coral	Cape Coral Yacht Club Beach	2/28/17	22
Fort Myers	Edison & Ford Winter Estates	2/28/17	18
Total			318

March 2017 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Fort Myers	RSW Airport	3/4/17	33
Fort Myers Beach	Estero Island Beach Club	3/7/17	9
Fort Myers Beach	DiamondHead Resort	3/7/17	7
Fort Myers Beach	The Pier	3/7/17	22
Sanibel	Point Santo	3/9/17	5
Sanibel	Holiday Inn Sanibel Island	3/9/17	11
Sanibel	Loggerhead Cay	3/9/17	7
Sanibel	Pelican Roost	3/9/17	4
Fort Myers	Jet Blue Park - Red Sox Game	3/14/17	22
Fort Myers	Miromar Outlets	3/16/17	20
Fort Myers	Hammond Stadium Twins Game	3/21/17	22
Fort Myers	RSW Airport	3/18/17	32
Fort Myers	Edison & Ford Winter Estates	3/23/17	22
Cape Coral	Cape Coral Yacht Club Beach	3/24/17	28
Fort Myers Beach	Best Western PLUS Beach Resort	3/28/17	9
Fort Myers Beach	Windward Passage	3/28/17	7
Fort Myers Beach	Bel-Air	3/28/17	7
Fort Myers Beach	Times Square	3/28/17	15
Sanibel	Casa Ybel	3/29/17	7
Sanibel	Sanibel Inn	3/29/17	9
Sanibel	Sanibel Arms West	3/29/17	6
Sanibel	Tortuga Beach Resort	3/29/17	6
Sanibel	Sanibel Surfside	3/29/17	8
Total			318

Occupancy Interviewing Statistics

Interviews were conducted during the first two weeks of April 2017 to gather information about lodging activity during January, February, and March 2017. Information was provided by 105 Lee County lodging properties.

Lodging Type	Winter 2017 Number of Interviews
Hotel/Motel/Resort/B&Bs	59
Condo/Cottage/Vacation Home/Timeshare	29
RV Park/Campground	17
Total	105

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