



*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 2016 Visitor Profile and Occupancy Analysis

May 12, 2016

Prepared for:

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

Prepared by:

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Executive Summary

Winter 2016

Throughout this report, statistically significant differences between responses for 2015 and 2016 at the 95% confidence level are noted with an A,B lettering system.

For example:

2015 A	2016 B
60%	70%A

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

Executive Summary

Visitation Estimates

- During the winter 2016 season, Lee County hosted more than 724,000 visitors staying in paid accommodations and about 607,000 staying with friends or relatives while visiting, for a total of 1.3 million visitors.
- Winter 2016 visitation among paid accommodations guests was down 6.7% from 2015, and visitation among those staying with friends or relatives dropped 2.4%. As a result, Lee County saw a 4.8% decrease in total visitation versus winter 2015.

Estimated Visitation	Winter 2015	Winter 2016	% Change
Paid Accommodations	776,164	724,071	-6.7%
Friends/Relatives	621,792	606,576	-2.4%
Total Visitation	1,397,956	1,330,647	-4.8%

Visitor Expenditures

- Winter 2016 visitors spent an estimated \$1.16 billion during their stay in Lee County, which was somewhat higher than estimated spending among winter 2015 visitors (\$1.13 billion).
- Expenditures among winter 2016 paid accommodations guests amounted to \$859.4 million (74% of the total). Those staying with friends or relatives contributed the remaining \$301.2 million. Spending among winter season paid accommodations guests increased 4.4% year-over-year, while Lee County saw a slight decline among the VFR traveler segment (-1.8%).

Estimated Expenditures	Winter 2015	Winter 2016	% Change
Paid Accommodations	\$822,847,372	\$859,414,065	4.4%
Friends/Relatives	\$306,647,788	\$301,163,095	-1.8%
Total Expenditures	\$1,129,495,160	\$1,160,577,160	2.8%

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

Visitor Origin

- As seen last year, eight in ten winter 2016 visitors staying in paid accommodations reside within the United States (79%). The majority of international visitors staying in paid accommodations came from Canada (9%), followed by Germany and the UK (5% each).
- More than half of domestic paid accommodations visitors came from the Midwest (59%). One quarter arrived from the Northeast (22%), slightly fewer from the South (15%), and a small minority from the West (4%).
- Minneapolis, Indianapolis, and Chicago were the top Midwest domestic feeder markets for Lee County lodging industry during winter 2016. Boston and New York were the primary contributors from the Northeast region.

Winter 2016 Top DMAs (Paid Accommodations)		
Minneapolis-Saint Paul	8%	45,726
Boston (Manchester, NH)	7%	37,842
New York	5%	29,958
Indianapolis	5%	28,381
Chicago	5%	26,805
Saint Louis	4%	20,498
Milwaukee	3%	18,921
Detroit	3%	17,344
Philadelphia	3%	17,344
Cincinnati	2%	14,191
Washington, DC (Hagerstown)	2%	14,191
Grand Rapids	2%	12,614
Youngstown	2%	12,614
Cleveland -Akron (Canton)	2%	12,614

Visitors Staying in Paid Accommodations					
Winter Season	%		Visitor Estimates		% Change
	2015	2016	2015	2016	
Country of Origin					
United States	81%	79%	630,633	570,782	-9.5%
Canada	8%	9%	64,243	68,544	6.7%
Germany	4%	5%	31,466	34,895	10.9%
UK	3%	5%	26,222	34,895	33.1%
Scandinavia	1%	1%	6,555	7,477	14.1%
BeNeLux	1%	<1%	3,933	2,492	-36.6%
Switzerland	1%	<1%	5,244	1,246	-76.2%
Latin America	<1%	<1%	2,622	1,246	-52.5%
Austria	<1%	-	1,311	-	-
France	<1%	-	1,311	-	-
Other International	<1%	<1%	2,622	2,492	-4.9%

Visitors Staying in Paid Accommodations					
Winter Season	%		Visitor Estimates		% Change
	2015	2016	2015	2016	
U.S. Region of Origin					
Florida	3%	2%	17,299	9,460	-45.3%
South (including Florida)	14%	15%	88,068	86,721	-1.5%
Midwest	60%	59%	375,864	337,424	-10.2%
Northeast	24%	22%	149,402	126,140	-15.6%
West	3%	4%	17,299	20,498	18.5%

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 2016 percentages.

Trip Planning

- Many Lee County's winter 2016 visitors planned their Lee County trip well in advance - on par with last year. Seven in ten 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. 68% in 2015)
 - 61% chose Lee County for trip (vs. 61% in 2015)
 - 59% made lodging reservation (vs. 57% in 2015)
- The internet continues to be a key tool for planning their trip, with nine in ten 2016 winter visitors indicating they have visited one or more websites to prepare for their Lee County trip (87%). Visitors most often mentioned using *airline websites* (40%), followed by *search engines* (28%), *vacation rental websites* (27%), *booking websites* (24%), *trip advisor* (24%), or *hotel websites* (21%).
- Six in ten winter 2016 visitors reported that they use their laptop to access destination planning information online (59%). Nearly as many said they use their smartphone (54%), with fewer who mention using a tablet (44%) or desktop computer (41%).
- The characteristics rated most favorably as influencing the decision to visit Lee County in winter 2016 included:
 - *Warm weather* (91%);
 - *Peaceful/relaxing* (81%);
 - *White sandy beaches* (75%);
 - *A safe destination* (70%);
 - *Convenient location* (67%); and
 - *Clean, unspoiled environment* (66%).

Visitor Profile

- As observed last winter, two-thirds of winter 2016 visitors flew to the area as their primary mode of transportation (67%), and the majority arrived at Southwest Florida International Airport (86%).
- On average, winter 2016 visitors stayed in Lee County for about 10 days. The majority indicated they came to Lee County for a vacation (83%), and one-third were visiting with friends or relatives (38%). Seven in ten visitors were repeaters (70%) who averaged five trips to Lee County in the past five years.

Visitor Profile (cont'd)

- Half of winter 2016 paid accommodation guests said they were staying in condo/vacation home properties (50%), slightly fewer in hotel/motel/resort/B&B properties (45%), and only a small number in RV parks/campgrounds (5%). Nearly all reported that the quality of their lodging either *met expectations* (61%) or *far exceeded/exceeded expectations* (33%).
- Visitors enjoyed a variety of activities while visiting Lee County, the most prevalent include: *beaches* (88%), *dining* (76%), *relaxing* (76%), and *shopping* (55%). Half of winter visitors took a day trip outside of Lee County (55%), and those that did were most likely to visit Naples (36%).
- Winter visitors continued to be highly satisfied with their stay in Lee County, with nearly all visitors indicating they were either *very satisfied* (47%) or *satisfied* (44% vs. 39% in 2015). Furthermore, the majority of winter 2016 visitors indicated they will recommend Lee County to a friend over other areas in Florida (85% vs. 80% in 2015). Just as many intend to return to Lee County themselves (85%), with six in ten of them suggesting they will do so next year (60%).
- When asked what they liked least about the area, half cited *traffic* as a negative aspect encountered during their trip (52 vs. 57% in 2015), typical for the winter season. While emerging at lower levels overall, there was a significant increase in the proportion of negative mentions for: *weather* (14% vs. 5% in 2015), *water quality* (13% vs. 4% in 2015), and *red tide* (13% vs. 2% in 2015). This corresponds with the historic rainfall amounts in January 2016, leading to Lake Okeechobee releases and brown waters in the Gulf of Mexico.
- The demographic composition of Winter 2016 visitors can be summarized as follows:
 - 55 years of age on average
 - \$101,200 household income on average
 - 75% married
 - 50% traveling as a couple
 - 23% traveling as a family
 - 86% 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 2015 to 2016 (3.3% and 1.1% respectively). All property categories experienced growth in *available* room nights, and while hotel/motel/resort properties posted a decline in occupied room nights year-over-year, both condo/vacation homes and RV parks/campgrounds showed an increase.

Winter Season	Occupied Room Nights			Available Room Nights		
	2015	2016	% Change	2015	2016	% Change
Hotel/Motel/Resort/B&B	883,487	872,552	-1.2%	1,004,411	1,036,478	3.2%
Condo/Cottage/Vacation Home	329,693	345,851	4.9%	372,839	385,707	3.5%
RV Park/Campground	404,654	417,767	3.2%	423,450	438,650	3.6%
Total	1,617,834	1,636,170	1.1%	1,800,700	1,860,835	3.3%

- Consequently, the industry-wide average occupancy rate in Lee County decreased from 89.8% in winter 2015 to 87.9% in winter 2016 (-2.1%), fueled mostly by the decline observed in the hotel/motel/resort category (-4.3%).
- Lee County's average daily rate for the winter season rose 4.7% year-over-year. All three lodging categories experienced gains in ADR when compared with last year.
- RevPAR grew by a modest 2.5% from winter 2015 to 2016, dampened by the drop in average occupancy rate. RevPAR increases were most favorable for the condo/vacation home (+5.2%) and RV parks/campgrounds (+4.0%) categories.

Winter Season	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2015	2016	% Change	2015	2016	% Change	2015	2016	% Change
Hotel/Motel/Resort/B&B	88.0%	84.2%	-4.3%	\$196.48	\$207.21	5.5%	\$172.83	\$174.44	0.9%
Condo/Cottage/Vacation Home	88.4%	89.7%	1.4%	\$258.66	\$268.35	3.7%	\$228.73	\$240.62	5.2%
RV Park/Campground	95.6%	95.2%	-0.3%	\$64.19	\$67.01	4.4%	\$61.34	\$63.82	4.0%
AVERAGE	89.8%	87.9%	-2.1%	\$176.06	\$184.34	4.7%	\$158.18	\$162.08	2.5%

Lodging Industry Assessments (cont'd)

- According to reports from Lee County property managers, reservations for spring season 2016 (April, May, and June) suggest business will not be as strong as last spring. Two in ten responding managers mentioned their total reservations for the next three months are *up* over the same period last year (23% vs. 60% in 2015), and four in ten said reservations are the *same* (38% vs. 29% in 2015). The remaining one-third claimed that their reservation are *down* (33%) compared with only 6% saying the same in 2015.

Winter 2016 Lee County Snapshot

Total Visitation				
Winter Season	%		Visitor Estimates	
	2015	2016	2015	2016
Paid Accommodations	55%	54%	776,164	724,071
Friends/Relatives	45%	46%	<u>621,792</u>	<u>606,576</u>
Total Visitation			1,397,956	1,330,647

Total Visitor Expenditures			
Winter Season	2015	2016	% Change
Total Visitor Expenditures	\$1,129,495,160	\$1,160,577,160	2.8%
Paid Accommodations	\$822,847,372	\$859,414,065	4.4%

Visitor Origin - Visitors Staying in Paid Accommodations				
Winter Season	%		Visitor Estimates	
	2015	2016	2015	2016
Florida	3%	2%	17,299	9,460
United States	81%	79%	630,633	570,782
Canada	8%	9%	64,243	68,544
Germany	4%	5%	31,466	34,895
UK	3%	5%	26,222	34,895
Other International	3%	2%	23,600	14,955

First-Time/Repeat Visitors to Lee County		
Winter Season	2015	2016
First-time	28%	28%
Repeat	70%	70%

Winter Season	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2015	2016	% Change	2015	2016	% Change	2015	2016	% Change
Hotel/Motel/Resort/B&B	88.0%	84.2%	-4.3%	\$196.48	\$207.21	5.5%	\$172.83	\$174.44	0.9%
Condo/Cottage/Vacation Home	88.4%	89.7%	1.4%	\$258.66	\$268.35	3.7%	\$228.73	\$240.62	5.2%
RV Park/Campground	95.6%	95.2%	-0.3%	\$64.19	\$67.01	4.4%	\$61.34	\$63.82	4.0%
AVERAGE	89.8%	87.9%	-2.1%	\$176.06	\$184.34	4.7%	\$158.18	\$162.08	2.5%

Visitor Profile Analysis Winter 2016

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.

A total of 950 interviews were conducted with visitors in Lee County during the winter months of January, February, and March 2015. 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*	
	2015 A	2016 B	2015 A	2016 B	2015 A	2016 B
Total Respondents	950	966	950	966	598*	587*
<u>Less than 3 months (NET)</u>	<u>28%</u>	<u>29%</u>	<u>32%</u>	<u>32%</u>	<u>32%</u>	<u>32%</u>
<1 month	4%	4%	8%	7%	9%	7%
1 month - <2 months	12%	11%	13%	11%	11%	13%
2 months - <3 months	11%	14%	11%	14%	12%	11%
<u>3 months or more (NET)</u>	<u>68%</u>	<u>67%</u>	<u>61%</u>	<u>61%</u>	<u>57%</u>	<u>59%</u>
3 months - <6 months	25%	26%	23%	23%	24%	24%
6 months - <1 year	21%	21%	16%	19%	19%	22%
A year or more	23%	20%	22%	20%	14%	12%
No Lodging Reservations Made	-	-	-	-	7%	7%
No Answer	4%	3%	7%	6%	4%	2%

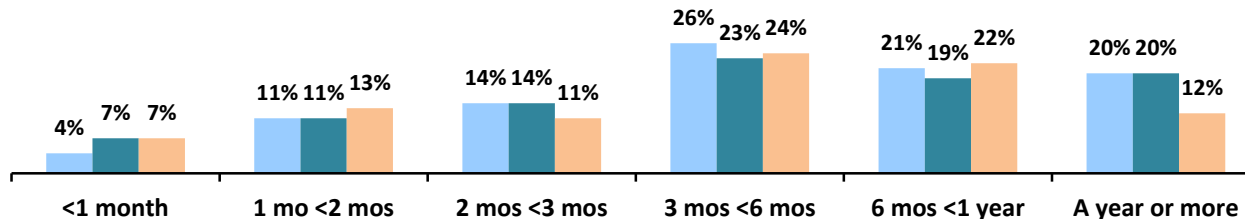
Q3a: When did you "start talking" about going on this trip?

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

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

Winter 2016 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		
	2015	2016
Winter Season	A	B
Total Respondents	950	960
<u>Any (NET)</u>	<u>95%</u>	<u>96%</u>
Laptop computer	57%	59%
Smartphone (iPhone, Blackberry, etc.)	46%	54%a
Tablet (iPad, etc.)	42%	44%
Desktop computer	41%	41%
E-Reader (Nook, Kindle, etc.)	4%	3%
Other portable device	2%	2%
None of these	5%	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		
	2015	2016
Winter Season	A	B
Respondents who use devices to plan	901	923
<u>Visited web sites (net)</u>	<u>86%</u>	<u>87%</u>
Airline websites	37%	40%
Search Engines	26%	28%
Vacation rental websites	25%	27%
Booking websites	19%	24%a
Trip Advisor	21%	24%
Hotel websites	22%	21%
Visit Florida	13%b	10%
www.FortMyers-Sanibel.com	10%	9%
AAA	11%	9%
Facebook	7%	8%
Other	8%	9%
None/Didn't visit websites	13%	12%
No Answer	1%	2%

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

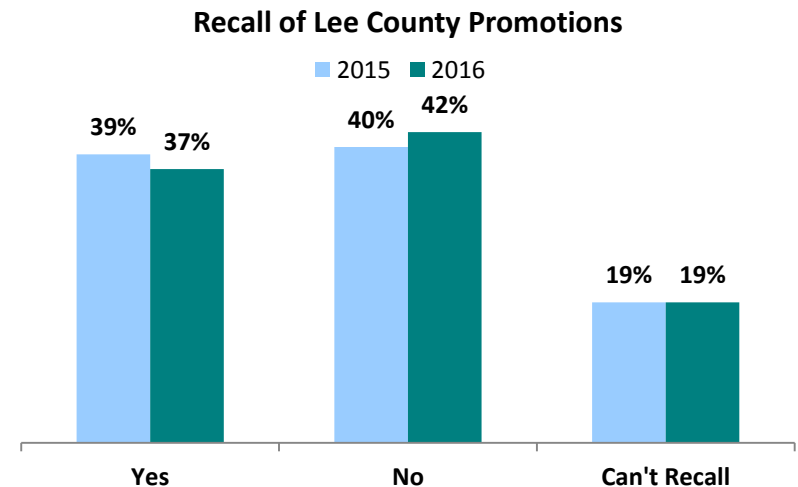
Travel Planning

Travel Information Requested		
	2015	2016
Winter Season	A	B
Total Respondents	950	966
<u>Requested information (NET)</u>	<u>27%</u>	<u>26%</u>
<i>Hotel website</i>	10%	10%
<i>VCB website</i>	7%	6%
<i>Call hotel</i>	6%	5%
<i>Visitor Guide</i>	5%	3%
<i>E-Newsletter</i>	1%	1%
<i>Call VCB</i>	1%	1%
<i>Call local Chamber of Commerce</i>	1%	1%
<i>Magazine Reader Services Card</i>	<1%	1%
<i>Other</i>	8%	9%
<u>None/Did not request information</u>	<u>67%</u>	<u>69%</u>
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		
	2015	2016
Winter Season	A	B
Total Respondents	950	966
Yes	39%	37%
No	40%	42%
Can't Recall	19%	19%
No Answer	1%	2%

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



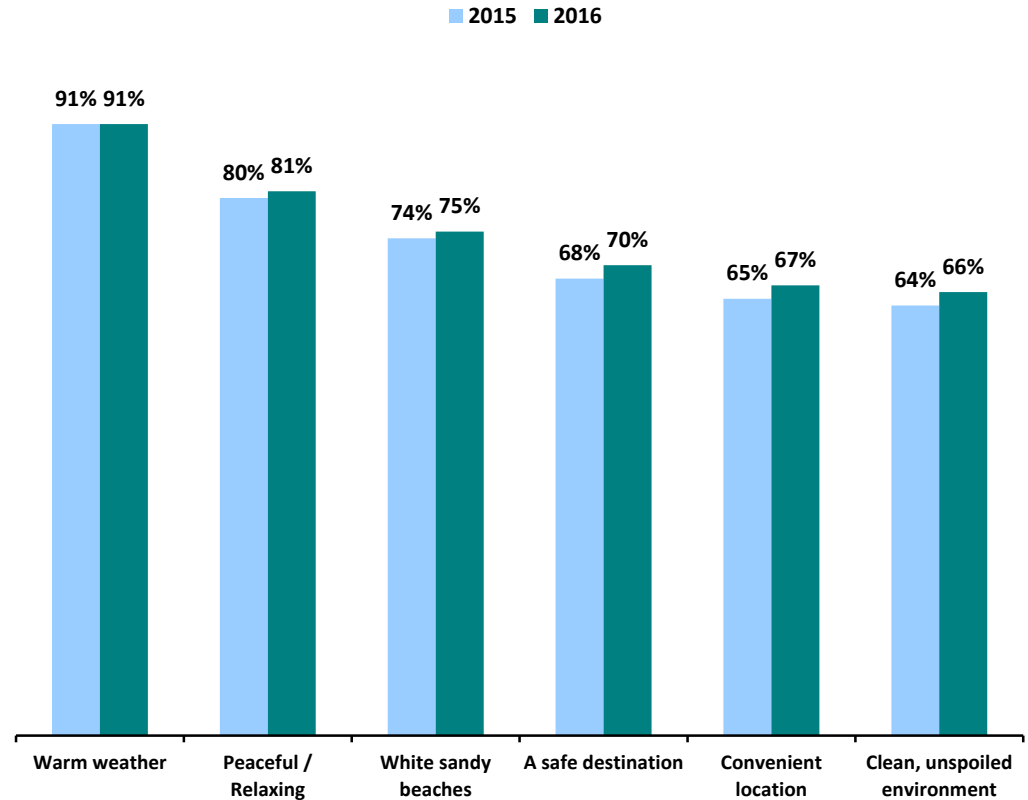
Travel Planning

Travel Decision Influences*		
Winter Season	2015	2016
	A	B
Total Respondents	950	966
Warm weather	91%	91%
Peaceful / Relaxing	80%	81%
White sandy beaches	74%	75%
A safe destination	68%	70%
Convenient location	65%	67%
Clean, unspoiled environment	64%	66%
Plenty to see and do	61%	62%
Good value for the money	58%	58%
Affordable dining	50%	52%
Reasonably priced lodging	49%	50%
A "family" atmosphere	46%	47%
Upscale accommodations	45%	43%

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	2015	2016
	A	B
Total Respondents	950	966
Fly	64%	67%
Drive A personal vehicle	28%	27%
Drive A rental vehicle	4%	4%
Drive an RV	3%	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	2015	2016
	A	B
Total Respondents	950	966
<u>One or more trips</u>	<u>56%</u>	<u>60%</u>
1 trip	40%	42%
2 to 3 trips	13%	15%
4 to 5 trips	2%	2%
6 or more trips	2%	2%
None/No Answer	44%	40%

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

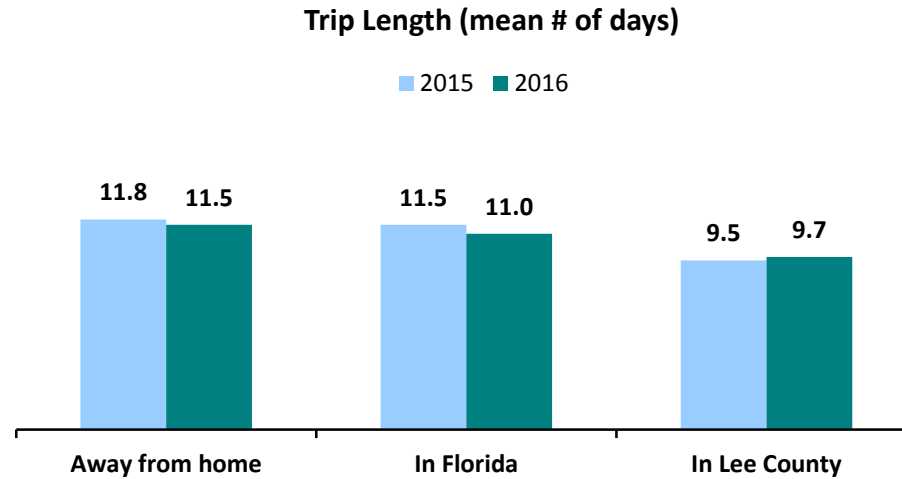
Airport Used		
Winter Season	2015	2016
	A	B
Respondents who flew	609	648
SW Florida Int'l (Fort Myers)	85%	86%
Punta Gorda	4%	5%
Tampa Int'l	3%	3%
Ft. Lauderdale Int'l	1%	2%
Orlando Int'l	3%	1%
Miami Int'l	2% b	1%
Other/No Answer	2%	1%

Q2: At which Florida airport did you land?

Trip Profile

Trip Length Mean # of Days		
Winter Season	2015	2016
	A	B
Total Respondents	950	966
Away from home	11.8	11.5
In Florida	11.5	11.0
In Lee County	9.5	9.7

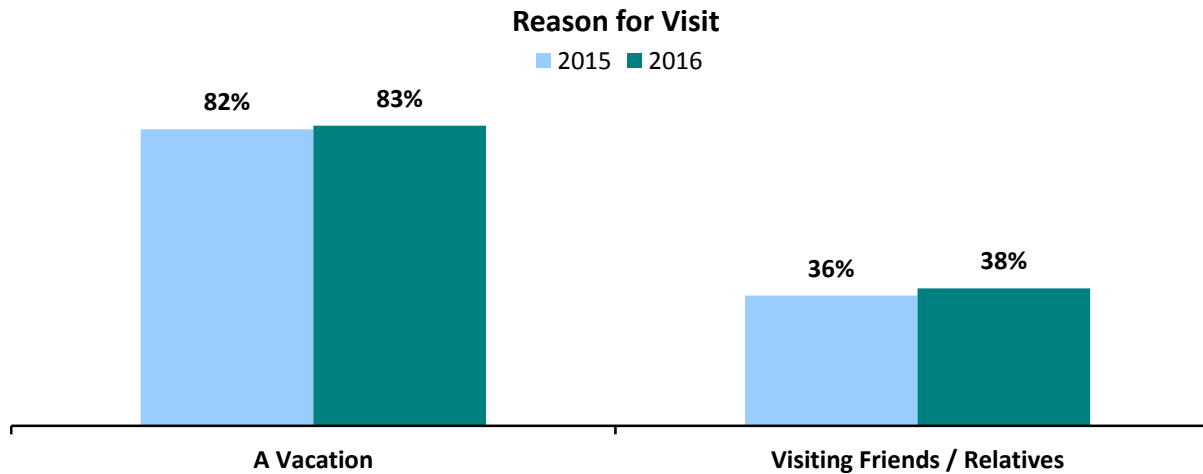
Q4a/b/c: On this trip, how many days will you be:



Trip Profile

Reason(s) for Visit		
Winter Season	2015	2016
	A	B
Total Respondents	950	966
A Vacation	82%	83%
Visiting Friends/Relatives	36%	38%
Sporting Event(s)	4%	5%
Personal Business	1%	2%
Other Business Trip	<1%	1%
A Conference/Meeting	<1%	1%
A Convention /Trade Show	<1%	-
Other/No Answer (NET)	3%	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	
	2015	2016	2015	2016	2015	2016	2015	2016
	A	B	A	B	A	B	A	B
Total Respondents	950	966	18**	10**	588	595	182	189
First-time visitor	28%	28%	N/A	N/A	22%	22%	50%	53%
Repeat visitor	70%	70%	N/A	N/A	77%	77%	48%	44%
No Answer	2%	2%	N/A	N/A	1%	1%	2%	3%

Q15: Is this your first visit to Lee County?

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

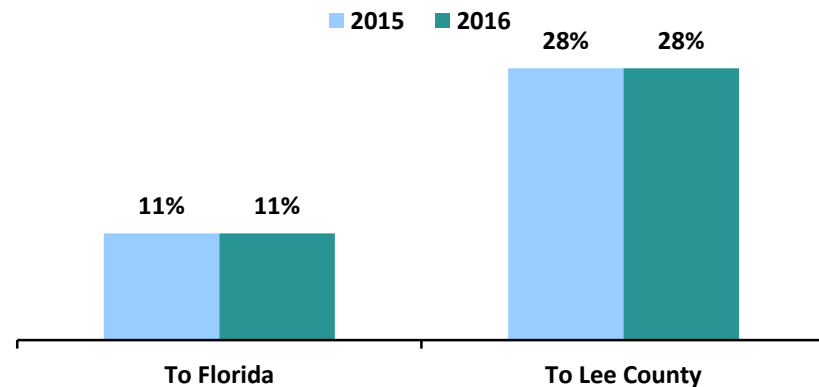
**N/A: Insufficient number of responses for statistical analysis (N<30).

First Time Visitors to Florida		
Winter Season	2015	2016
Total Respondents	950	966
	A	B
Yes, first-time visitor	11%	11%
No	85%	86%
No answer	2%	2%
<i>FL Residents*</i>	2%	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



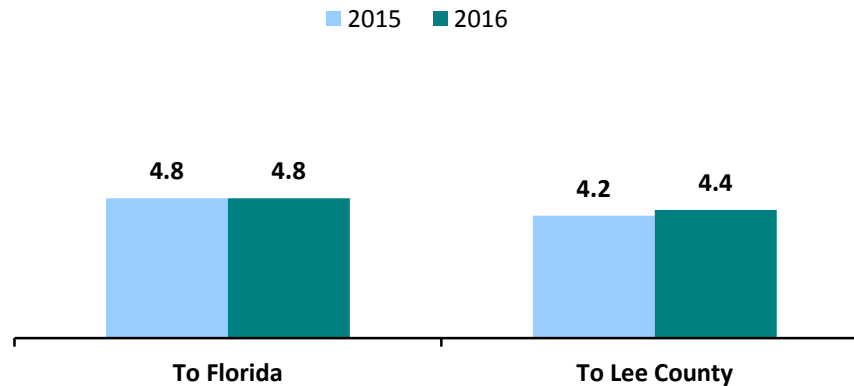
Trip Profile

Previous Visits in Five Years				
Winter Season	Mean # of Visits to Florida		Mean # of Visits to Lee County	
	2015	2016	2015	2016
	A	B	A	B
Base: Repeat Visitors	808 (FL res. Excl)	832 (FL res. Excl)	662	675
Number of visits	4.8	4.8	4.2	4.4

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

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

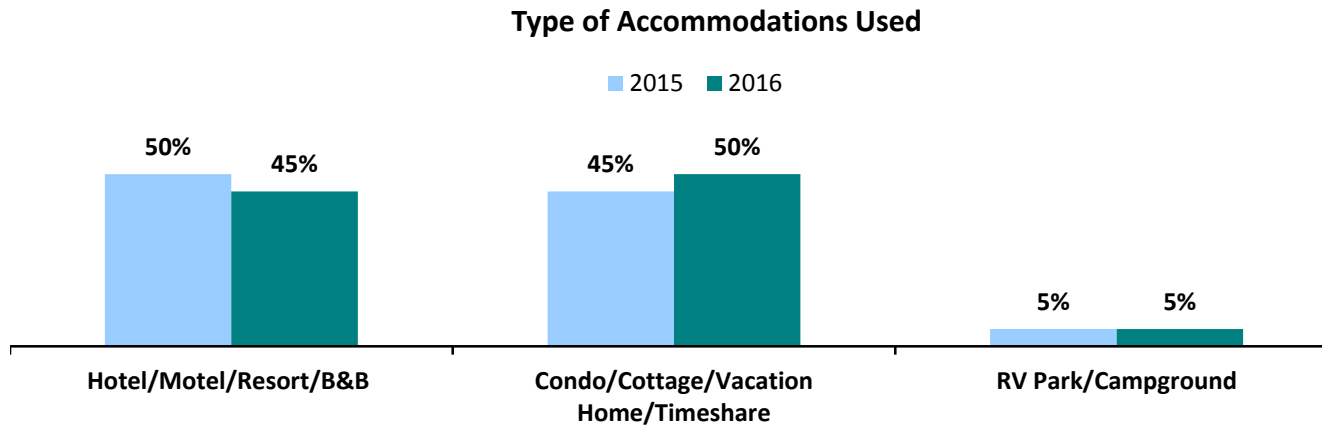
Previous Visits in Five Years



Trip Profile

Type of Accommodations Used		
Winter Season	2015	2016
	A	B
Total respondents staying in paid accommodations	598	587
Hotel/Motel/Resort/B&B (NET)	50%	45%
At a hotel/motel/historic inn	35%	29%
At a resort	15%	15%
At a Bed and Breakfast	<1%	1%
Condo/Cottage/Vacation Home/Timeshare (NET)	45%	50%
RV Park/Campground (NET)	5%	5%

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



Trip Profile

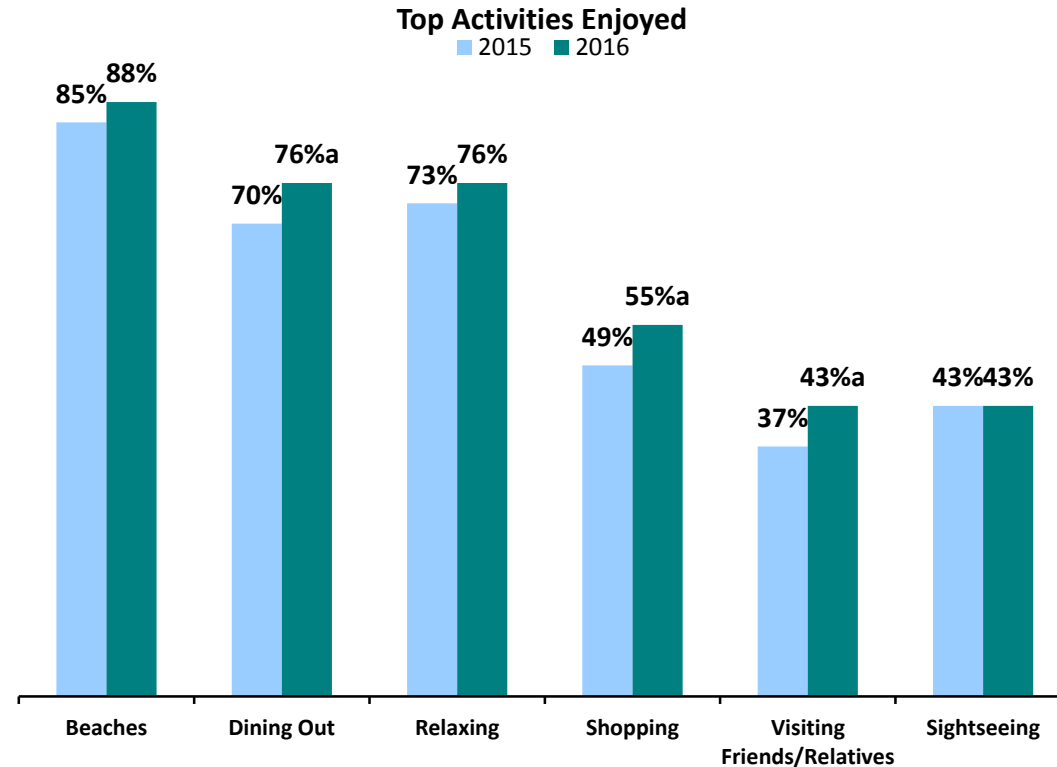
Quality of Accommodations		
Winter Season	2015	2016
	A	B
Total respondents staying in paid accommodations	598	587
Far exceeded/Exceeded expectations	37%	33%
Met your expectations	55%	61%a
Did not meet/Far below expectations	5%	5%
No Answer	3%	2%

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	
	2015	2016	2015	2016	2015	2016	2015	2016
	A	B	A	B	A	B	A	B
Total respondents staying in paid accommodations	170	186	417	389	481	458	111	123
Far exceeded/Exceeded expectations	29%	30%	40%	35%	37%	36%	34%b	20%
Met your expectations	59%	62%	54%	60%	55%	58%	58%	73%a
Did not meet/Far below expectations	7%	5%	4%	4%	6%	5%	2%	5%
No Answer	5%	3%	2%	1%	2%	2%	7%	2%

Trip Activities

Activities Enjoyed		
Winter Season	2015	2016
	A	B
Total Respondents	950	966
Beaches	85%	88%
Dining Out	70%	76%a
Relaxing	73%	76%
Shopping	49%	55%a
Visiting Friends/Relatives	37%	43%a
Sightseeing	43%	43%
Swimming	43%	41%
Shelling	34%	33%
Watching Wildlife	24%	28%
Exercise/Working Out	19%	27%a
Attractions	28%	25%
Bicycle Riding	17%	24%a
Birdwatching	16%	19%
Golfing	14%	19%a
Photography	18%	19%
Bars/Nightlife	14%	12%
Sporting Event	8%	10%
Miniature Golf	7%	10%a
Boating	10%	10%
Fishing	12%b	9%
Kayaking/Canoeing	8%	8%
Cultural Events	6%	7%
Guided Tour	8%	6%
Tennis	4%	4%
Parasailing/Jet Skiing	3%	3%
Scuba Diving/Snorkeling	1%	1%
Other	2%	5%a
No Answer	2%	1%



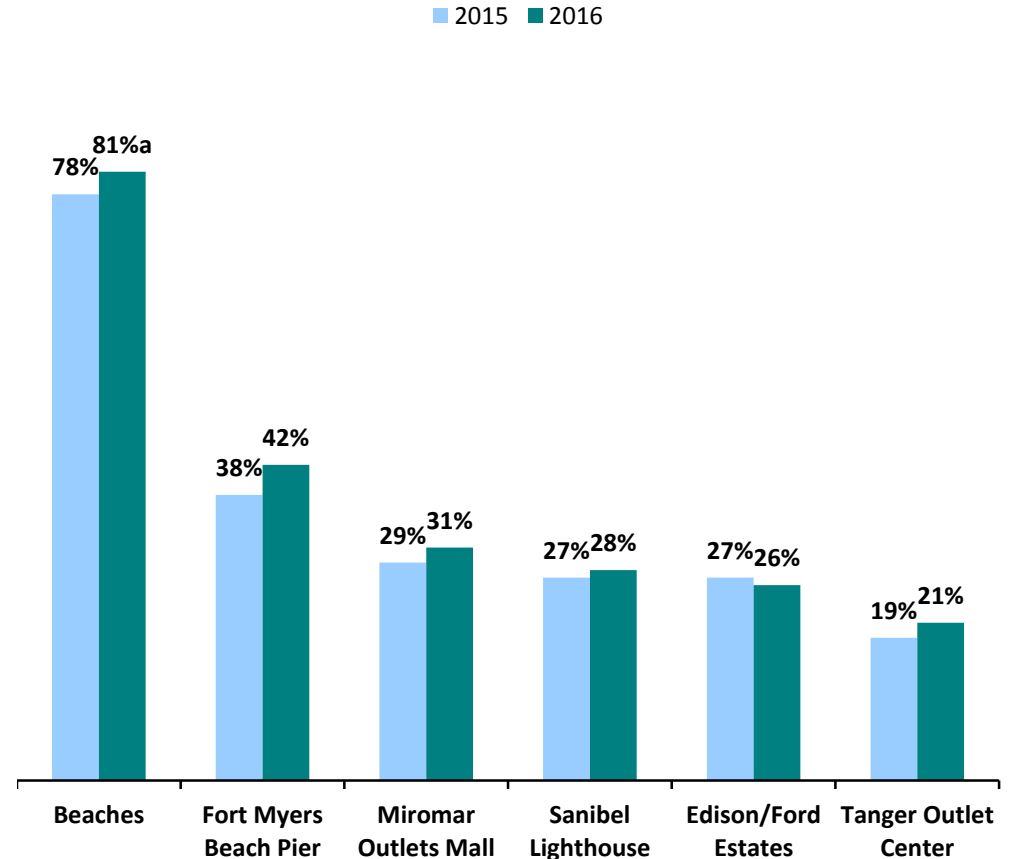
Q23: What activities or interests are you enjoying while in Lee County?
(Please mark ALL that apply.)

Trip Activities

Attractions Visited		
Winter Season	2015	2016
	A	B
Total Respondents	950	966
Beaches	78%	81%a
Fort Myers Beach Pier	38%	42%
Miromar Outlets Mall	29%	31%
Sanibel Lighthouse	27%	28%
Edison/Ford Estates	27%	26%
Tanger Outlet Center	19%	21%
Ding Darling National Wildlife Refuge	19%	18%
Bell Tower Shops	10%	14%a
Gulf Coast Town Center	9%	12%a
Periwinkle Place	11%	11%
Coconut Point Mall	10%	11%
Shell Factory and Nature Park	9%	11%
Manatee Park	7%	10%a
Edison Mall	6%	8%a
Bailey-Matthews Shell Museum	3%	3%
Barbara B. Mann Performing Arts Hall	2%	2%
Broadway Palm Dinner Theater	2%	2%
Babcock Wilderness Adventures	1%	1%
Other	5%	8%a
None/No Answer (NET)	5%	6%

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

Top Attractions Visited



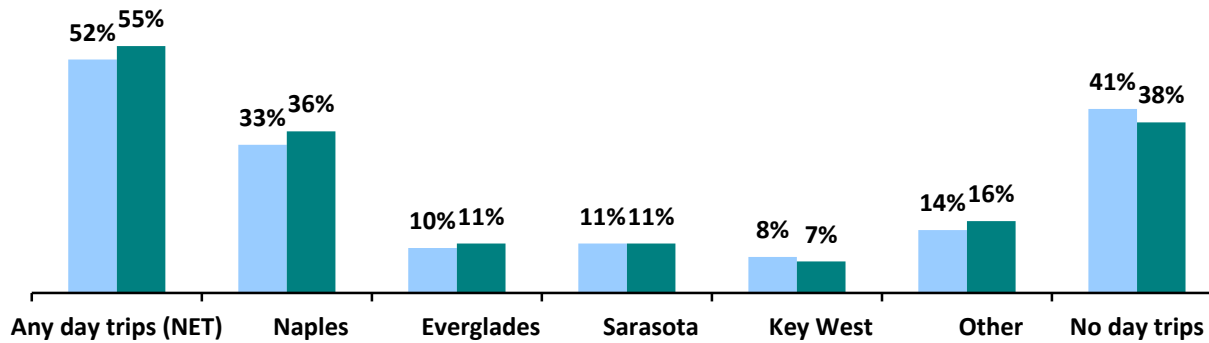
Trip Activities

Day Trips Outside Lee County		
Winter Season	2015	2016
	A	B
Total Respondents	950	966
<u>Any day trips (NET)</u>	<u>52%</u>	<u>55%</u>
<i>Naples</i>	33%	36%
<i>Everglades</i>	10%	11%
<i>Sarasota</i>	11%	11%
<i>Key West</i>	8%	7%
<i>Other</i>	14%	16%
<u>No day trips</u>	<u>41%</u>	<u>38%</u>
No Answer	15%	16%

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

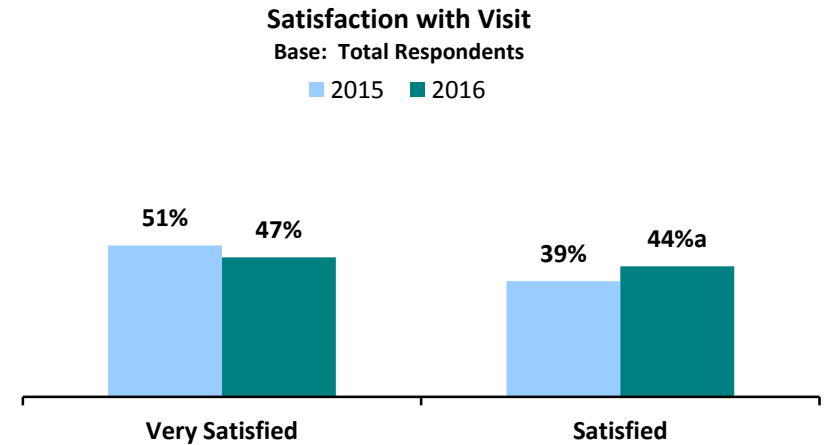
Day Trips Outside Lee County

■ 2015 ■ 2016



Lee County Experience

Satisfaction with Visit		
	Total Respondents	
Winter Season	2015	2016
	A	B
Total Respondents	950	966
<u>Very Satisfied/Satisfied</u>	<u>90%</u>	<u>92%</u>
<i>Very Satisfied</i>	51%	47%
<i>Satisfied</i>	39%	44% ^a
Neither	2%	2%
Dissatisfied/Very Dissatisfied	1%	1%
Don't know/no answer	7%	5%



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

Ratings by Subgroup								
	First-Timers		Repeaters		U.S. Residents		International Residents	
Winter Season	2015	2016	2015	2016	2015	2016	2015	2016
	A	B	A	B	A	B	A	B
Total Respondents	271	272	662	675	756	766	182	189
<u>Very Satisfied/Satisfied</u>	<u>86%</u>	<u>88%</u>	<u>93%</u>	<u>93%</u>	<u>91%</u>	<u>92%</u>	<u>88%</u>	<u>92%</u>
<i>Very Satisfied</i>	32%	30%	60%	55%	55%	51%	37%	34%
<i>Satisfied</i>	54%	58%	33%	38%	37%	41%	51%	58%

Future Plans

Likelihood to Recommend/Return to Lee County		
Winter Season	2015	2016
	A	B
Total Respondents	950	966
Likely to Recommend Lee County	80%	85%a
Likely to Return to Lee County	86%	85%
Base: Total Respondents Planning to Return	820	824
Likely to Return Next Year	58%	60%

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

Q31: Will you come back to Lee County?

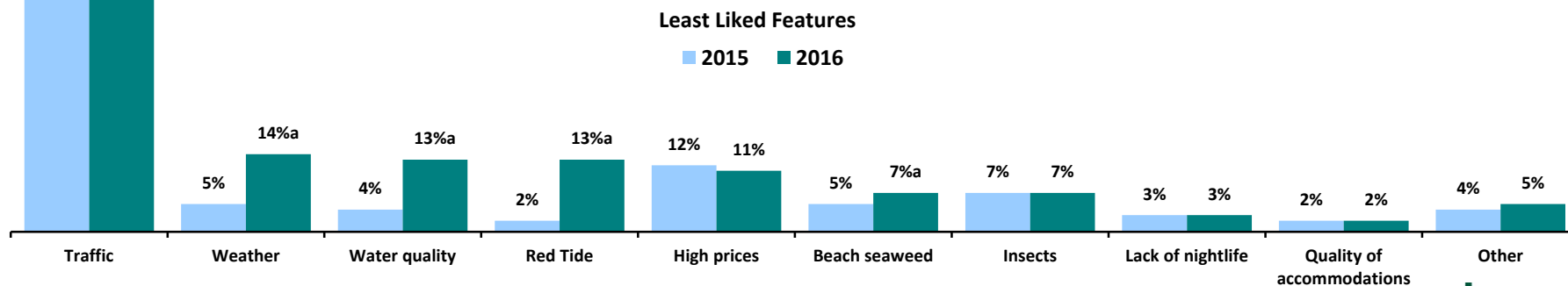
Q32: Will you come back next year?

Ratings by Subgroup								
Winter Season	First-Timers		Repeaters		U.S. Residents		International Residents	
	2015	2016	2015	2016	2015	2016	2015	2016
	A	B	A	B	A	B	A	B
Total Respondents	271	272	662	675	756	766	182	189
Likely to Recommend Lee County	71%	78%	84%	87%	82%	84%	77%	86%a
Likely to Return to Lee County	75%	70%	91%	92%	88%	87%	83%	78%
Base: Total Respondents Planning to Return	203	190	604	620	662	666	152	149
Likely to Return Next Year	29%	34%	68%	69%	61%	61%	43%	57%a

Trip Activities

Least Liked Features		
Winter Season	2015	2016
	A	B
Total Respondents	950	966
Traffic	57% ^b	52%
Weather	5%	14% ^a
Water quality	4%	13% ^a
Red Tide	2%	13% ^a
High prices	12%	11%
Beach seaweed	5%	7% ^a
Insects	7%	7%
Lack of nightlife	3%	3%
Quality of accommodations	2%	2%
Other	4%	5%
Nothing/No Answer (NET)	30% ^b	24%

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

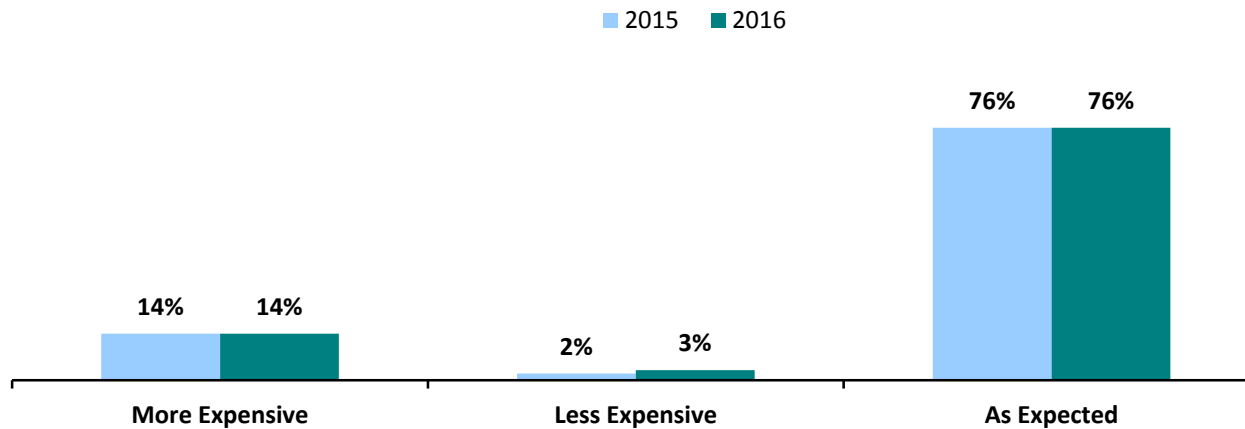


Trip Activities

Perception of Lee County as Expensive		
Winter Season	2015	2016
	A	B
Total Respondents	950	966
More Expensive	14%	14%
Less Expensive	2%	3%
As Expected	76%	76%
Don't know/No Answer (NET)	9%	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	2015	2016
	A	B
Total Respondents	950	966
Age of respondent (mean)	55.6	55.4
Annual household income (mean)	\$101,053	\$101,171
<u>Martial Status</u>		
Married	75%	75%
Single	11%	12%
Other	11%	11%
Vacations per year (mean)	3.0	3.0
Short getaways per year (mean)	3.9	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	2015	2016
	A	B
Total Respondents	950	966
Couple	49%	50%
Family	24%	23%
Group of couples/friends	17%	16%
Single	6%	8%
Mean travel party size	2.8	2.8
Mean adults in travel party	2.6	2.5

Q17: On this trip, are you traveling:

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

Travel Parties with Children		
Winter Season	2015	2016
	A	B
Total Respondents	950	966
<u>Traveling with any Children (net)</u>	<u>14%</u>	<u>14%</u>
Any younger than 6	6%	7%
Any ages 6-11	6%	6%
Any 12-17 years old	6%	6%
No Children	86%	86%

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	2015	2016	2015	2016	% Change
Paid Accommodations	55%	54%	776,164	724,071	-6.7%
Friends/Relatives	45%	46%	621,792	606,576	-2.4%
Total Visitation			1,397,956	1,330,647	-4.8%

Visitors Staying in Paid Accommodations					
	%		Visitor Estimates		% Change
Winter Season	2015	2016	2015	2016	
Country of Origin					
United States	81%	79%	630,633	570,782	-9.5%
Canada	8%	9%	64,243	68,544	6.7%
Germany	4%	5%	31,466	34,895	10.9%
UK	3%	5%	26,222	34,895	33.1%
Scandinavia	1%	1%	6,555	7,477	14.1%
BeNeLux	1%	<1%	3,933	2,492	-36.6%
Switzerland	1%	<1%	5,244	1,246	-76.2%
Latin America	<1%	<1%	2,622	1,246	-52.5%
Austria	<1%	-	1,311	-	-
France	<1%	-	1,311	-	-
Other International	<1%	<1%	2,622	2,492	-4.9%

U.S. Region of Origin	2015	2016	2015	2016	% Change
Florida	3%	2%	17,299	9,460	-45.3%
South (including Florida)	14%	15%	88,068	86,721	-1.5%
Midwest	60%	59%	375,864	337,424	-10.2%
Northeast	24%	22%	149,402	126,140	-15.6%
West	3%	4%	17,299	20,498	18.5%

Winter 2016 Top DMAs (Paid Accommodations)		
Minneapolis-Saint Paul	8%	45,726
Boston (Manchester, NH)	7%	37,842
New York	5%	29,958
Indianapolis	5%	28,381
Chicago	5%	26,805
Saint Louis	4%	20,498
Milwaukee	3%	18,921
Detroit	3%	17,344
Philadelphia	3%	17,344
Cincinnati	2%	14,191
Washington, DC (Hagerstown)	2%	14,191
Grand Rapids	2%	12,614
Youngstown	2%	12,614
Cleveland -Akron (Canton)	2%	12,614

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 2016 percentages.

Occupancy Data Analysis Winter 2016

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).

For the 2015 winter season, property managers were interviewed in April 2015 to provide data for each specific month of the season (January, February, and March 2015).

Occupancy/Daily Rates

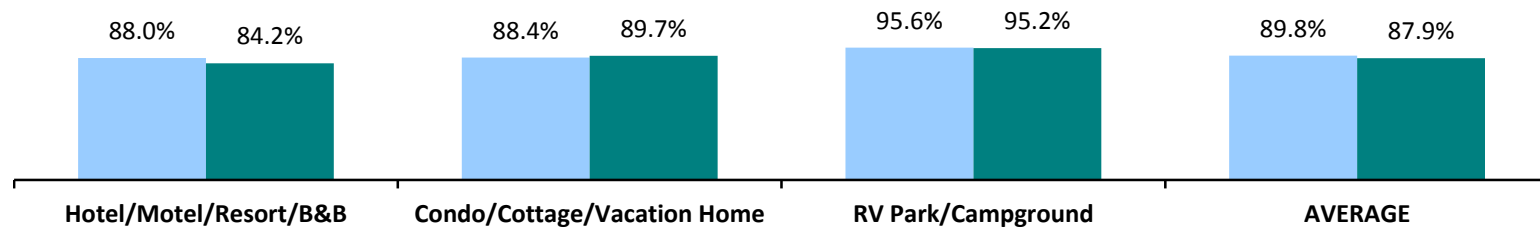
	Average Occupancy Rate			Average Daily Rate			RevPAR		
Winter Season	2015	2016	% Change	2015	2016	% Change	2015	2016	% Change
Hotel/Motel/Resort/B&B	88.0%	84.2%	-4.3%	\$196.48	\$207.21	5.5%	\$172.83	\$174.44	0.9%
Condo/Cottage/Vacation Home	88.4%	89.7%	1.4%	\$258.66	\$268.35	3.7%	\$228.73	\$240.62	5.2%
RV Park/Campground	95.6%	95.2%	-0.3%	\$64.19	\$67.01	4.4%	\$61.34	\$63.82	4.0%
AVERAGE	89.8%	87.9%	-2.1%	\$176.06	\$184.34	4.7%	\$158.18	\$162.08	2.5%

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]?

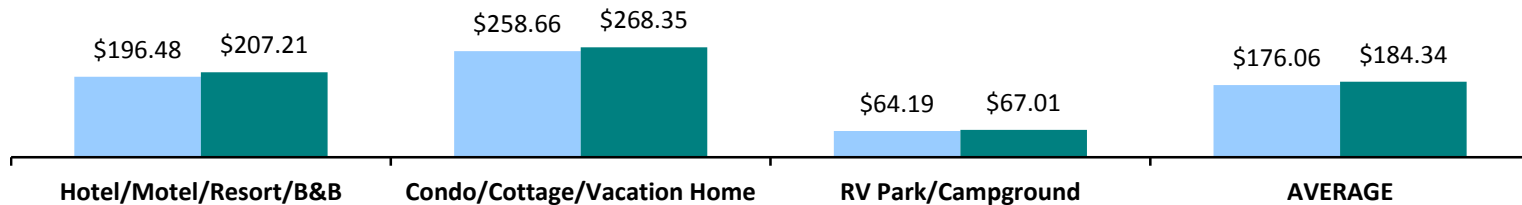
Average Occupancy Rate

■ 2015 ■ 2016



Average Daily Rate

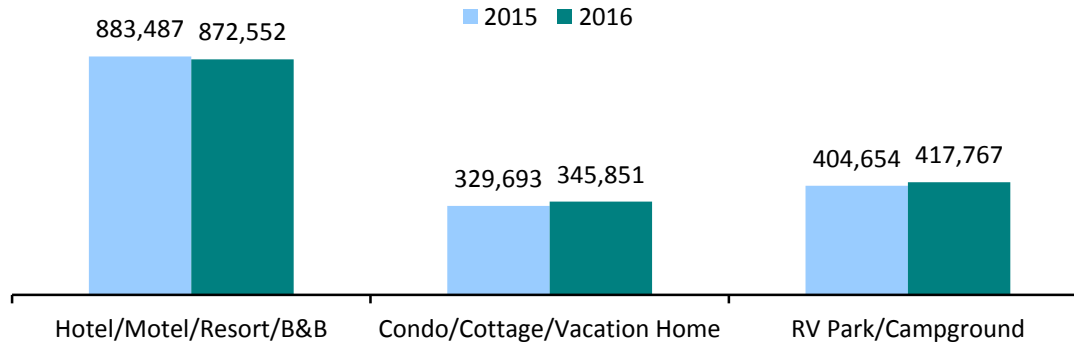
■ 2015 ■ 2016



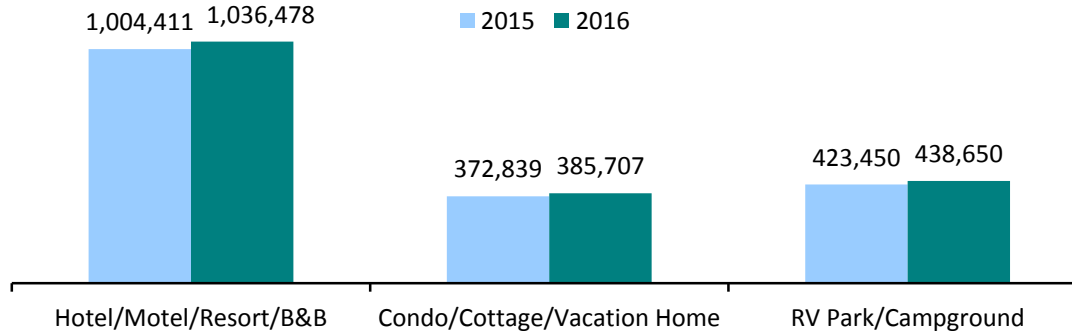
Room/Unit/Site Nights

Winter Season	Occupied Room Nights			Available Room Nights		
	2015	2016	% Change	2015	2016	% Change
Hotel/Motel/Resort/B&B	883,487	872,552	-1.2%	1,004,411	1,036,478	3.2%
Condo/Cottage/Vacation Home	329,693	345,851	4.9%	372,839	385,707	3.5%
RV Park/Campground	404,654	417,767	3.2%	423,450	438,650	3.6%
Total	1,617,834	1,636,170	1.1%	1,800,700	1,860,835	3.3%

Occupied Room Nights



Available Room Nights



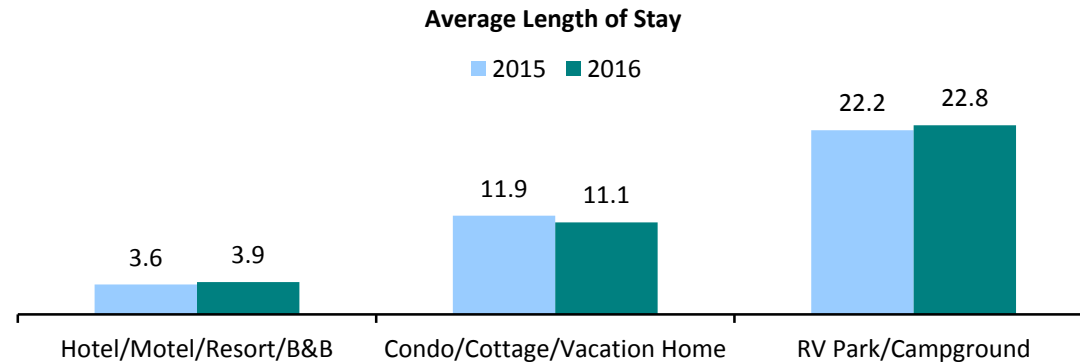
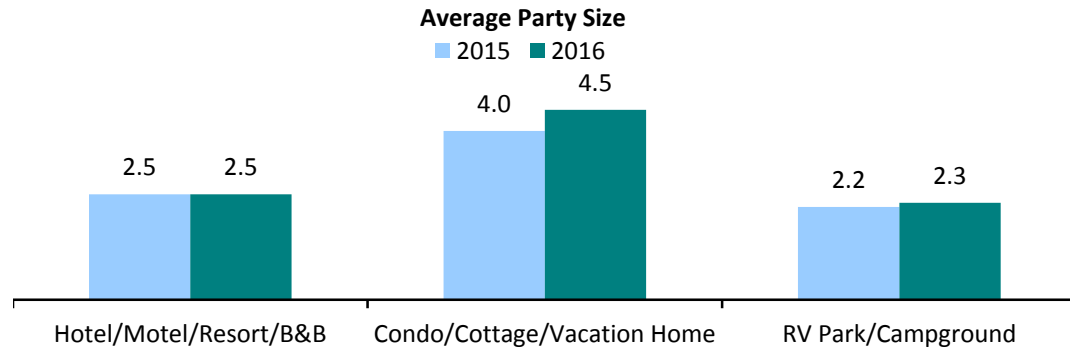
Average Party Size and Length of Stay

Winter Season	Average Party Size			Average Length of Stay		
	2015	2016	% Change	2015	2016	% Change
Hotel/Motel/Resort/B&B	2.5	2.5	-2.8%	3.6	3.9	10.3%
Condo/Cottage/Vacation Home	4.0	4.5	12.1%	11.9	11.1	-6.1%
RV Park/Campground	2.2	2.3	1.8%	22.2	22.8	2.8%
Average	2.8	2.8	3.0%	5.7	6.4	11.7%

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]?

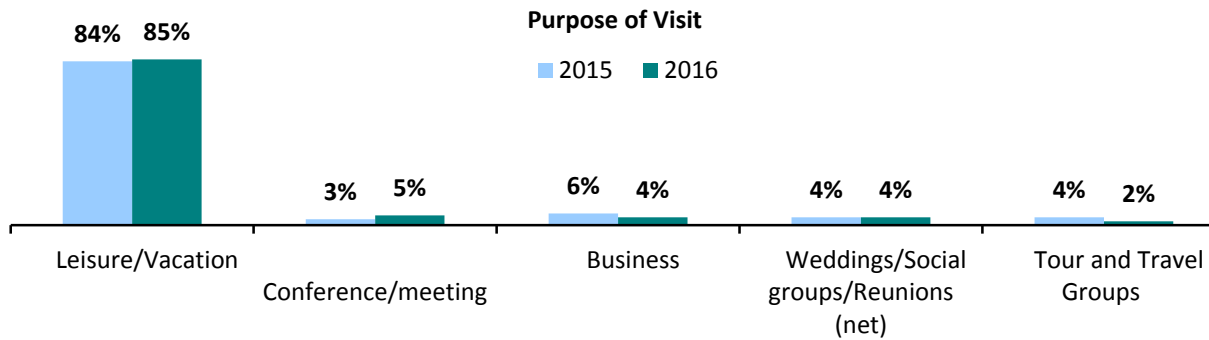
Note: Year-over-year percent change is calculated using unrounded figures for estimated average party size and length of stay.



Lodging Management Estimates

Guest Profile		
Winter Season	2015	2016
	A	B
Total Number of Responses	104	105
<u>Purpose of Visit</u>		
Leisure/Vacation	84%	85%
Conference/meeting	3%	5%
Business	6%	4%
Weddings/Social groups/Reunions (net)	4%	4%
Tour and Travel Groups	4%	2%

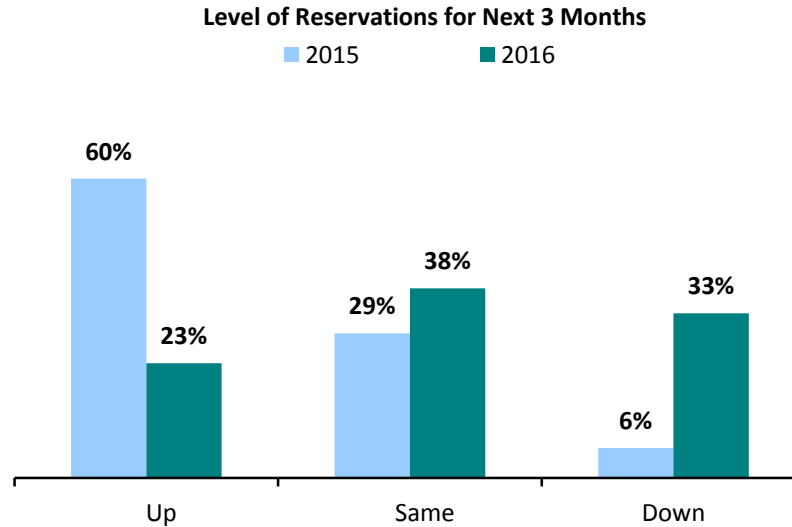
Q22: What percent of your [January/February/March] room/site/unit occupancy do you estimate was generated by:



Occupancy Barometer

Level of Reservations for Next 3 Months Compared to Last Year		
Winter Season	2015	2016
	A	B
Total Respondents	112	112
<u>Up/Same (net)</u>	<u>89%^b</u>	<u>61%</u>
Up	60% ^b	23%
Same	29%	38%
Down	6%	33% ^a

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 2016

Total Visitor Expenditures by Spending Category

TOTAL EXPENDITURES			
Winter Season	2015	2016	% Change
<u>TOTAL</u>	<u>\$1,129,495,160</u>	<u>\$1,160,577,160</u>	<u>2.8%</u>
Lodging Accommodations	\$284,841,463	\$301,608,801	5.9%
Food and Beverages	\$279,165,017	\$287,503,997	3.0%
Shopping	\$267,074,621	\$267,513,708	0.2%
Ground Transportation	\$105,459,688	\$104,901,612	-0.5%
Other	\$192,954,371	\$199,049,042	3.2%

(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	2015	2016	% Change	2015	2016	% Change
TOTAL	<u>\$822,847,372</u>	<u>\$859,414,065</u>	4.4%	<u>\$306,647,788</u>	<u>\$301,163,095</u>	-1.8%
Lodging Accommodations	\$284,841,463	\$301,608,801	5.9%	\$0	\$0	-
Food and Beverages	\$176,674,260	\$183,035,704	3.6%	\$102,490,757	\$104,468,293	1.9%
Shopping	\$168,184,474	\$171,428,766	1.9%	\$98,890,147	\$96,084,942	-2.8%
Ground Transportation	\$71,644,849	\$73,189,241	2.2%	\$33,814,839	\$31,712,371	-6.2%
Other	\$121,502,326	\$130,151,553	7.1%	\$71,452,045	\$68,897,489	-3.6%

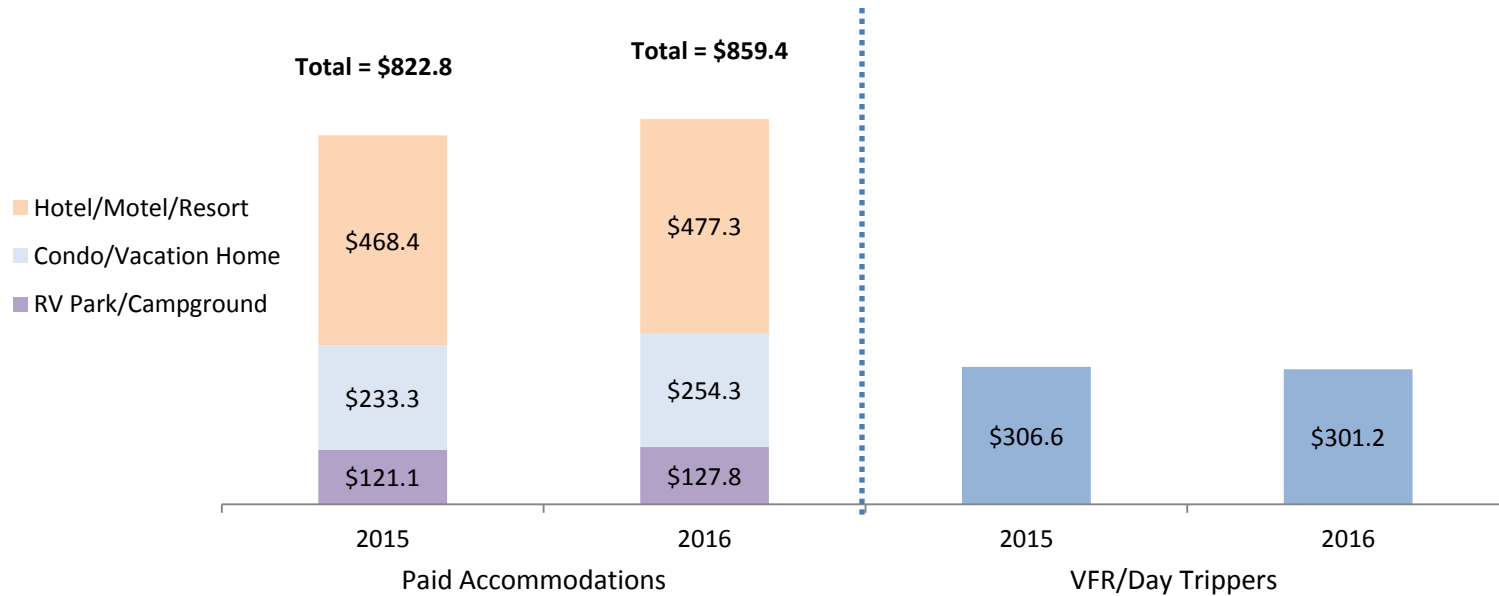
“Other ” includes the following categories:

- 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	2015	2016	% Change	2015	2016
<u>TOTAL</u>	<u>\$1,129,495,160</u>	<u>\$1,160,577,160</u>	<u>2.8%</u>	<u>100%</u>	<u>100%</u>
Visiting Friends & Relatives/Day Trippers	\$306,647,788	\$301,163,095	-1.8%	27%	26%
<u>Paid Accommodations</u>	<u>\$822,847,372</u>	<u>\$859,414,065</u>	<u>4.4%</u>	<u>73%</u>	<u>74%</u>
<i>Hotel/Motel/Resort/B&B</i>	\$468,399,483	\$477,308,860	1.9%	41%	41%
<i>Condo/Cottage/Vacation Home</i>	\$233,305,006	\$254,277,624	9.0%	21%	22%
<i>RV Park/Campground</i>	\$121,142,883	\$127,827,581	5.5%	11%	11%

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.

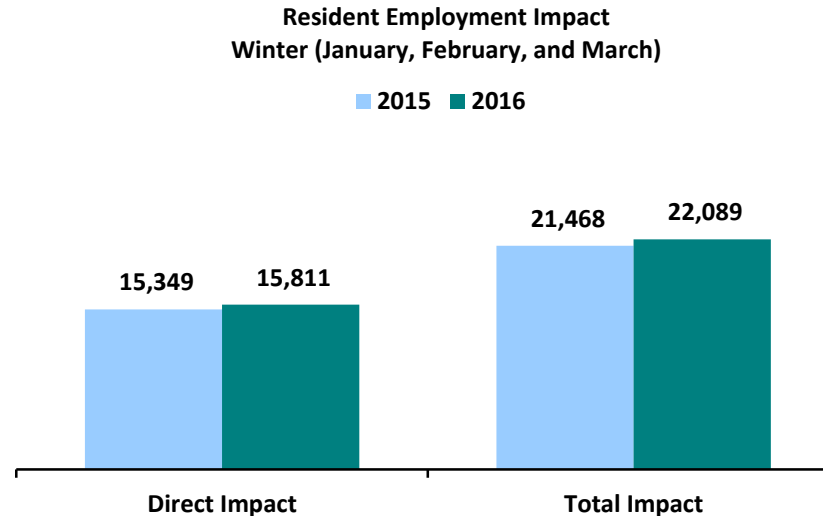
Impact on Jobs for Lee County Residents

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.).



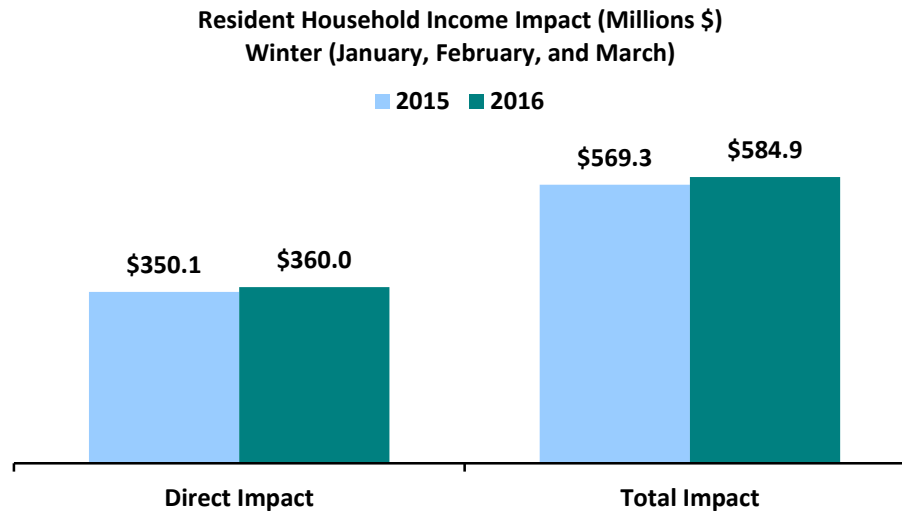
Impact on Household Income for Lee County Residents

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.

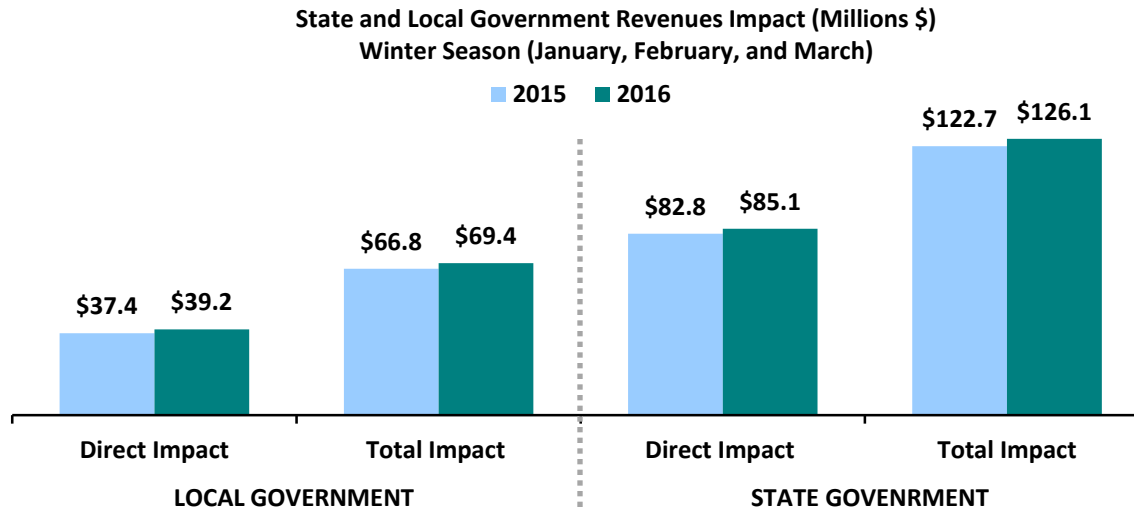
The gross government revenues accruing to governments as a result of producing the output purchased with visitor expenditures is the government revenue impact.

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 2016

January 2016 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Fort Myers Beach	Cane Palm Beach Condos	1/8/16	5
Fort Myers Beach	Windward Passage	1/8/16	6
Fort Myers Beach	Best Western PLUS Beach Resort	1/8/16	13
Fort Myers Beach	The Pier	1/8/16	12
Fort Myers	RSW Airport	1/9/16	33
Sanibel	Lighthouse Beach	1/14/16	20
Sanibel	Loggerhead Cay	1/14/16	7
Sanibel	Holiday Inn Sanibel Island	1/14/16	10
Bonita Springs	Bonita Beach Park	1/15/16	29
Fort Myers	Edison & Ford Winter Estates	1/20/16	27
Fort Myers Beach	DiamondHead Beach Resort	1/21/16	10
Fort Myers Beach	Estero Island Beach Club	1/21/16	10
Fort Myers Beach	Times Square	1/21/16	15
Fort Myers	Edison & Ford Winter Estates	1/25/16	28
Sanibel	Sanibel Inn	1/26/16	10
Sanibel	Casa Ybel	1/26/16	11
Sanibel	Pointe Santo	1/26/16	10
Estero	Miromar Outlet	1/29/16	20
Fort Myers	RSW Airport	1/30/16	33
Fort Myers	Centennial Park	1/31/16	9
Total			318

February 2016 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Fort Myers	RSW Airport	2/6/16	33
Bonita Springs	Bonita Beach Park	2/12/16	29
Fort Myers	Centennial Park	2/14/16	9
Sanibel	Lighthouse Beach	2/15/16	19
Sanibel	Loggerhead Cay	2/15/16	8
Sanibel	Compass Pointe	2/15/16	5
Sanibel	Holiday Inn Sanibel Island	2/15/16	10
Fort Myers Beach	The Pier	2/17/16	16
Fort Myers Beach	Winward Passage	2/17/16	5
Fort Myers Beach	Cane Palm Beach Condos	2/17/16	5
Fort Myers Beach	Best Western PLUS Beach Resort	2/17/16	10
Fort Myers	Edison & Ford Winter Estates	2/18/16	28
Fort Myers Beach	Neptune Inn	2/24/16	10
Fort Myers Beach	Estero Island Beach Club	2/24/16	9
Fort Myers Beach	Times Square	2/24/16	14
Estero	Miromar Outlet	2/25/16	22
Fort Myers	Edison & Ford Winter Estates	2/26/16	28
Fort Myers	RSW Airport	2/27/16	33
Sanibel	Sundial Beach Resort & Spa	2/29/16	8
Sanibel	Sanibel Surfside	2/29/16	10
Sanibel	Conquina Beach	2/29/16	10
Total			321

March 2016 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Fort Myers	RSW Airport	3/5/16	29
Fort Myers	Hammond Stadium (Spring Training)	3/8/16	22
Fort Myers	Edison & Ford Winter Estates	3/10/16	27
Fort Myers Beach	The Pier	3/15/16	14
Fort Myers Beach	Estero Island Beach Club	3/15/16	12
Fort Myers Beach	DiamondHead Beach Resort	3/15/16	12
Bonita Springs	Bonita Beach Park	3/18/16	23
Fort Myers	RSW Airport	3/19/16	34
Sanibel	Pointe Santo	3/23/16	8
Sanibel	Holiday Inn Sanibel Island	3/23/16	12
Sanibel	Sanibel Surfside	3/23/16	8
Sanibel	Compass Pointe	3/23/16	6
Fort Myers	Jet Blue Park (Spring Training)	3/24/16	22
Estero	Miromar Outlet	3/25/16	27
Sanibel	Sanibel Inn	3/28/16	12
Sanibel	Loggerhead Cay	3/28/16	6
Sanibel	Coquina Beach Club	3/28/16	5
Sanibel	Lighthouse Beach	3/28/16	11
Fort Myers Beach	Best Western PLUS Beach Resort	3/29/16	10
Fort Myers Beach	Cane Palm Beach Condos	3/29/16	8
Fort Myers Beach	Times Square	3/29/16	15
North Fort Myers	Shell Factory	3/30/16	4
Total			327

Occupancy Interviewing Statistics

Interviews were conducted during the first two weeks of April 2016 to gather information about lodging activity during January, February, and March 2016. Information was provided by 117 Lee County lodging properties.

Lodging Type	Winter 2016 Number of Interviews
Hotel/Motel/Resort/B&Bs	66
Condo/Cottage/Vacation Home/Timeshare	34
RV Park/Campground	17
Total	117

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