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

# Spring 2016 Visitor Profile and Occupancy Analysis

**August 11, 2016**

**Prepared for:**

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

**Prepared by:**

**Davidson-Peterson Associates**

## Executive Summary
## Spring 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<br>A | 2016<br>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 spring 2016, Lee County hosted approximately 1.3 million visitors, with 819,000 visitors staying in paid accommodations and an additional 488,000 staying with friends or relatives.
- Spring 2016 visitation among paid accommodations guests was up 3.0% from 2015, and visitation among those staying with friends or relatives was down 3.3% year-over-year. As a result, total visitation was flat year-over-year.

| Estimated Visitation | Spring 2015 | Spring 2016 | % Change |
|---|---|---|---|
| Paid Accommodations | 795,752 | 819,406 | 3.0% |
| Friends/Relatives | 504,111 | 487,515 | -3.3% |
| **Total Visitation** | **1,299,863** | **1,306,921** | **0.5%** |

Visitor Expenditures

- Spring 2016 visitors spent an estimated $704.5 million during their stay in Lee County – about the same as last spring ($705.4 million).
- Paid accommodations guests spent $467.4 million (66% of the total) – a slight decrease from last spring ($472.6 million). However, spending among visitors staying with friends or relatives increased 1.8% from last year, contributing $237.1 million to the total.

| Estimated Expenditures | Spring 2015 | Spring 2016 | % Change |
|---|---|---|---|
| Paid Accommodations | $472,583,652 | $467,435,888 | -1.1% |
| Friends/Relatives | $232,852,371 | $237,107,536 | 1.8% |
| **Total Expenditures** | **$705,436,023** | **$704,543,424** | **-0.1%** |

***Note: Spring season refers to the period including April, May, and June when referenced throughout this report.***

Visitor Origin

- Three-quarters of spring 2016 visitors staying in paid accommodations reside within the United States (77%). Germany represented the largest share of international paid accommodation guests (11%), followed by the UK (5%) and Canada (4%).

- Almost half of *domestic* paid accommodations visitors came from the Midwest (46%). The Northeast and South contributed one-quarter each (25% and 24% respectively), and the remaining 6% came from the West.

- The top domestic feeder markets for the Lee County lodging industry during spring 2016 were Indianapolis (7%), Boston (6%), Chicago (5%), and New York (5%).

**Spring 2016 Top DMAs (Paid Accommodations)**

| | | |
|---|---|---|
| Indianapolis | 7% | 45,686 |
| Boston (Manchester, NH) | 6% | 36,549 |
| Chicago | 5% | 32,894 |
| New York | 5% | 31,067 |
| Detroit | 4% | 27,412 |
| Cleveland-Akron (Canton) | 3% | 21,929 |
| Tampa-Saint Petersburg (Sarasota) | 3% | 16,447 |
| Denver | 3% | 16,447 |
| Atlanta | 3% | 16,447 |
| Cincinnati | 3% | 16,447 |
| Saint Louis | 3% | 16,447 |
| Minneapolis-Saint Paul | 3% | 16,447 |

**Visitors Staying in Paid Accommodations**

| | % | | Visitor Estimates | | % Change |
|---|---|---|---|---|---|
| Spring Season | 2015 | 2016 | 2015 | 2016 | |
| ***Country of Origin*** | | | | | |
| United States | 83% | 77% | 661,278 | 628,645 | -4.9% |
| Germany | 5% | 11% | 40,203 | 88,155 | 119.3% |
| UK | 4% | 5% | 29,113 | 41,910 | 44.0% |
| Canada | 6% | 4% | 48,521 | 30,348 | -37.5% |
| Scandinavia | 1% | 2% | 5,545 | 15,897 | 186.7% |
| BeNeLux | 1% | 1% | 4,159 | 7,226 | 73.7% |
| France | <1% | <1% | 2,773 | 2,890 | 4.2% |
| Switzerland | <1% | <1% | 1,386 | 2,890 | 108.5% |
| Latin America | <1% | - | 1,386 | - | - |
| Other International | <1% | <1% | 1,386 | 1,445 | 4.2% |

**Visitors Staying in Paid Accommodations**

| | % | | Visitor Estimates | | % Change |
|---|---|---|---|---|---|
| Spring Season | 2015 | 2016 | 2015 | 2016 | |
| ***U.S. Region of Origin*** | | | | | |
| Florida | 9% | 8% | 59,345 | 51,169 | -13.8% |
| South (including Florida) | 23% | 24% | 152,603 | 148,024 | -3.0% |
| Midwest | 46% | 46% | 303,510 | 286,911 | -5.5% |
| Northeast | 26% | 25% | 174,645 | 158,989 | -9.0% |
| West | 5% | 6% | 30,521 | 34,722 | 13.8% |

**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

- The trip planning window reported by spring 2016 visitors was comparable in length to that of spring 2015 visitors. For many visitors, their trip was planned well in advance. Three-quarters started talking about their Lee County trip *three or more months* in advance, and two-thirds chose the destination within that timeframe. Among those staying in paid accommodations, well over half made their lodging reservations within that window as well.
    - 76% started talking about trip 3+ months in advance (on par with 76% in 2015)
    - 67% chose Lee County for trip (vs. 69% in 2015)
    - 62% made lodging reservation (vs. 59% in 2015)

- Use of the internet as a planning tool was widespread among Lee County visitors, with 86% of spring visitors claiming to have visited one or more websites during the planning process. Visitors most often mention using *airline websites* (40%), followed by *vacation rental websites* (29%), *search engines* (28%), *trip advisor* (23%), and *booking* websites (23%) when preparing for their trip.

- Similar to last year, spring 2016 visitors were most likely to indicate they typically access destination planning information online using a laptop (56%) or smartphone (58%), with mentions of smartphones increasing since last year (53%). Not quite half reported using a tablet (44%) or desktop computer (43%).

- The characteristics motivating the decision to visit Lee County in spring 2016 included:
    - *Warm weather (85%);*
    - *Peaceful/relaxing (83%);*
    - *White sandy beaches* (73%);
    - *A safe destination* (73%); and
    - *Clean, unspoiled environment* (71%).

Visitor Profile

- On par with last spring, seven in ten visitors flew to the destination (71% vs. 73% in 2015). The airport mentioned most often as an entry point for visitors traveling by air was Southwest Florida International Airport (85%) – a slight increase from last year (81%).

- Spring visitors reported they were staying in Lee County 8 days on average. The majority were repeat visitors (67%) who have taken an average of four or five trips to Lee County in the past five years.

Visitor Profile (cont'd)

- Half of spring 2016 paid accommodation guests said they were staying in condo/vacation home properties (52% vs. 40% in 2015), slightly fewer in hotel/motel/resort properties (45% vs. 58% in 2015), and only a small number in RV parks/campgrounds (3%). Nearly all of those staying in paid accommodations reported that the quality of their lodgings *met expectations* (52%) or *far exceeded/exceeded expectations* (39%).

- The top activities enjoyed in Lee County during spring 2016 included: *beaches* (89%), *relaxing* (74%), *dining out* (72%), and to a lesser extent, *swimming,* (60%) and *shopping* (55%). When asked which attractions they were visiting in Lee County, beaches received the highest level of mentions (80%). Half of spring visitors took a day trip outside of Lee County (51%), with most visiting Naples (33%).

- Visitors continue to be highly satisfied with their stay in Lee County with the majority of spring 2016 visitors indicating they were either *very satisfied* or *satisfied* with their visit (53% and 39% respectively). For most spring visitors, their positive experiences in the destination foster an intent to return – eight in ten said they are likely to visit Lee County again (86%), and more than half of them said they will return next year (56%). Many visitors also said they will spread the word about their positive experiences, with 84% claiming to recommend Lee County over other areas in Florida.

- When asked what they liked least about the area, one in four spring visitors cited *traffic* (24%) – a decrease from last year (32%). *Insects* (16%), *water quality* (10%), *high prices* (9%), and *beach seaweed* (9%) ranked much lower. Compared with last spring, there was a significant increase in the proportion of unfavorable mentions of *water quality* (10% vs. 3% in 2015) and *red tide* (4% vs. 1% in 2015), acknowledging the challenges Lee County faced as a result of Lake Okeechobee releases.

- The demographic composition of spring 2016 visitors can be summarized as follows:
  - 52 years of age on average
  - $102,000 household income on average
  - 74% married
  - 39% traveling as a couple
  - 37% traveling as a family
  - 75% traveling *without* children
  - 3 people in travel party on average

Lodging Industry Assessments

- For the Lee County lodging industry in total, *available* room nights rose 3.7% from spring 2015 to 2016 while *occupied* room nights saw no change year-over-year. All property categories experienced growth in *available* room nights to varying degrees. However, *occupied* room nights for hotels/motels/resorts were on par with last spring (-0.2%), condos/vacation homes experienced a slight decrease (-2.3%), and RV parks/campgrounds experienced a small increase (+1.2%).

| Spring Season | Occupied Room Nights | | | Available Room Nights | | |
|---|---|---|---|---|---|---|
| | 2015 | 2016 | % Change | 2015 | 2016 | % Change |
| Hotel/Motel/Resort/B&B | 716,580 | 715,184 | -0.2% | 1,018,226 | 1,028,383 | 1.0% |
| Condo/Cottage/Vacation Home | 281,514 | 274,934 | -2.3% | 384,069 | 395,995 | 3.1% |
| RV Park/Campground | 158,452 | 160,390 | 1.2% | 404,417 | 449,055 | 11.0% |
| **Total** | **1,156,546** | **1,150,508** | **-0.5%** | **1,806,712** | **1,873,433** | **3.7%** |

- The result was a 4.1% drop in the Lee County industry-wide average occupancy rate from 64.0% in spring 2015 to 61.4% in spring 2016. The condo/vacation home and RV park/campground categories posted the sharpest decreases (-5.3% and -8.9% respectively).
- In contrast, average daily rate showed no change from spring 2015 to 2016 ($142.69 to $142.44). Hotels/motels/resorts saw a slight decline in ADR, while RV parks/campgrounds remained the same and condo/vacation homes saw an increase.
- Spring season RevPAR suffered a 4.2% decline from 2015 to 2016. All property categories faced a decline in RevPAR, but it was most notable for RV parks/campgrounds.

| Spring Season | Average Occupancy Rate | | | Average Daily Rate | | | RevPAR | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2015 | 2016 | % Change | 2015 | 2016 | % Change | 2015 | 2016 | % Change |
| Hotel/Motel/Resort/B&B | 70.4% | 69.5% | -1.3% | $149.43 | $147.61 | -1.2% | $105.16 | $102.65 | -2.4% |
| Condo/Cottage/Vacation Home | 73.3% | 69.4% | -5.3% | $180.73 | $186.08 | 3.0% | $132.47 | $129.19 | -2.5% |
| RV Park/Campground | 39.2% | 35.7% | -8.9% | $44.65 | $44.60 | -0.1% | $17.49 | $15.93 | -8.9% |
| **AVERAGE** | **64.0%** | **61.4%** | **-4.1%** | **$142.69** | **$142.44** | **-0.2%** | **$91.34** | **$87.48** | **-4.2%** |

Lodging Industry Assessments (cont'd)

- According to reports from Lee County property managers, reservations for the upcoming summer season (July, August, and September) suggest business will not be as strong as last summer. Three in ten responding managers mentioned their total reservations for the next three months are *up* over the same period last year (30% vs. 45% in 2015), and another three in ten said reservations are the *same* (35% vs. 34% in 2015). The remaining one-third claimed that their reservations are *down* (28%) compared with only 14% saying the same in 2015.

THE BEACHES OF FORT MYERS AND SANIBEL

# Spring 2016 Lee County Snapshot

## Total Visitation

| Spring Season | % 2015 | % 2016 | Visitor Estimates 2015 | Visitor Estimates 2016 |
|---|---|---|---|---|
| Paid Accommodations | 61% | 63% | 795,752 | 819,406 |
| Friends/Relatives | 39% | 37% | 504,111 | 487,515 |
| **Total Visitation** | | | **1,299,863** | **1,306,921** |

## Visitor Origin - Visitors Staying in Paid Accommodations

| Spring Season | % 2015 | % 2016 | Visitor Estimates 2015 | Visitor Estimates 2016 |
|---|---|---|---|---|
| Florida | 9% | 8% | 59,345 | 51,169 |
| | | | | |
| United States | 83% | 77% | 661,278 | 628,645 |
| Germany | 5% | 11% | 40,203 | 88,155 |
| UK | 4% | 5% | 29,113 | 41,910 |
| Canada | 6% | 4% | 48,521 | 30,348 |
| Other International | 2% | 4% | 16,636 | 30,348 |

## Total Visitor Expenditures

| Spring Season | 2015 | 2016 | % Change |
|---|---|---|---|
| Total Visitor Expenditures | $705,436,023 | $704,543,424 | -0.1% |
| Paid Accommodations | $472,583,652 | $467,435,888 | -1.1% |

## First-Time/Repeat Visitors to Lee County

| Winter Season | 2015 | 2016 |
|---|---|---|
| First-time | 34% | 31% |
| Repeat | 63% | 67% |

| | Average Occupancy Rate | | | Average Daily Rate | | | RevPAR | | |
|---|---|---|---|---|---|---|---|---|---|
| Spring Season | 2015 | 2016 | % Change | 2015 | 2016 | % Change | 2015 | 2016 | % Change |
| Hotel/Motel/Resort/B&B | 70.4% | 69.5% | -1.3% | $149.43 | $147.61 | -1.2% | $105.16 | $102.65 | -2.4% |
| Condo/Cottage/Vacation Home | 73.3% | 69.4% | -5.3% | $180.73 | $186.08 | 3.0% | $132.47 | $129.19 | -2.5% |
| RV Park/Campground | 39.2% | 35.7% | -8.9% | $44.65 | $44.60 | -0.1% | $17.49 | $15.93 | -8.9% |
| **AVERAGE** | **64.0%** | **61.4%** | **-4.1%** | **$142.69** | **$142.44** | **-0.2%** | **$91.34** | **$87.48** | **-4.2%** |



dpa Davidson Peterson Associates

# Calendar YTD 2016 Lee County Snapshot

| Total Calendar Year Visitation | % | | Visitor Estimates | |
|---|---|---|---|---|
| | 2015 | 2016 | 2015 | 2016 |
| Paid Accommodations | 58% | 59% | 1,571,916 | 1,543,477 |
| Friends/Relatives | 42% | 41% | 1,125,903 | 1,094,091 |
| **Total Visitation** | | | **2,697,819** | **2,637,568** |

| Total Visitor Expenditures | 2015 | 2016 | % Change |
|---|---|---|---|
| Total Visitor Expenditures | $1,834,931,183 | $1,865,120,584 | 1.6% |
| Paid Accommodations | $1,295,431,024 | $1,326,849,953 | 2.4% |

| Visitor Origin - Visitors Staying in Paid Accommodations | % | | Visitor Estimates | |
|---|---|---|---|---|
| | 2015 | 2016 | 2015 | 2016 |
| Florida | 6% | 5% | 76,739 | 57,643 |
| | | | | |
| US | 82% | 78% | 1,291,506 | 1,200,333 |
| Germany | 5% | 8% | 71,451 | 119,764 |
| Canada | 7% | 7% | 113,243 | 102,270 |
| UK | 4% | 5% | 55,273 | 76,703 |
| Other International | 3% | 3% | 40,444 | 44,407 |

| First-Time/Repeat Visitors to Lee County | 2015 | 2016 |
|---|---|---|
| First-time | 31% | 30% |
| Repeat | 67% | 69% |

| | Average Occupancy Rate | | | Average Daily Rate | | | RevPAR | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2015 | 2016 | % Change | 2015 | 2016 | % Change | 2015 | 2016 | % Change |
| Hotel/Motel/Resort/B&B | 79.1% | 76.9% | -2.8% | $175.41 | $180.36 | 2.8% | $138.76 | $138.69 | -0.1% |
| Condo/Cottage/Vacation Home | 80.8% | 79.4% | -1.7% | $222.77 | $231.92 | 4.1% | $179.89 | $184.18 | 2.4% |
| RV Park/Campground | 68.0% | 65.1% | -4.2% | $58.69 | $60.79 | 3.6% | $39.92 | $39.59 | -0.8% |
| **AVERAGE** | **76.9%** | **74.6%** | **-3.0%** | **$162.15** | **$167.04** | **3.0%** | **$124.71** | **$124.65** | **0.0%** |

**Visitor Profile Analysis**

**Spring 2016**

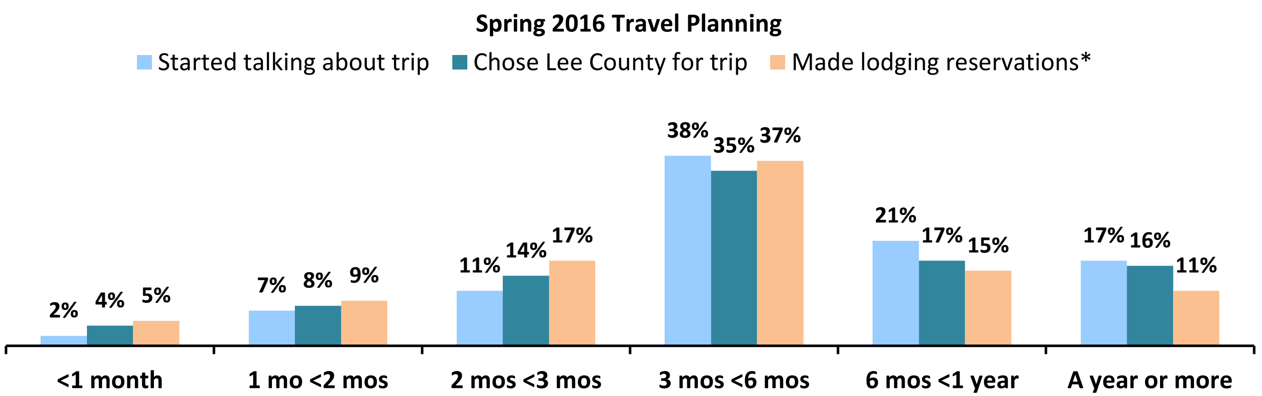
*A total of 935 interviews were conducted with visitors in Lee County during the spring months of April, May, and June 2016. A total sample of this size is considered accurate to plus or minus 3.2 percentage points at the 95% confidence level.*

*A total of 932 interviews were conducted with visitors in Lee County during the spring months of April, May, and June 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

| | Started Talking About Trip | | Chose Lee County for Trip | | Made Lodging Reservations* | |
|---|---|---|---|---|---|---|
| **Spring Season** | **2015** | **2016** | **2015** | **2016** | **2015** | **2016** |
| | **A** | **B** | **A** | **B** | **A** | **B** |
| **Total Respondents** | **932** | **935** | **932** | **935** | **583*** | **571*** |
| Less than 3 months (NET) | 21% | 21% | 25% | 26% | 34% | 32% |
| <1 month | 4% | 2% | 4% | 4% | 4% | 5% |
| 1 month - <2 months | 8% | 7% | 9% | 8% | 15%a | 9% |
| 2 months - <3 months | 10% | 11% | 12% | 14% | 15% | 17% |
| 3 months or more (NET) | 76% | 76% | 69% | 67% | 59% | 62% |
| 3 months - <6 months | 41% | 38% | 39% | 35% | 36% | 37% |
| 6 months - <1 year | 19% | 21% | 15% | 17% | 13% | 15% |
| A year or more | 16% | 17% | 15% | 16% | 10% | 11% |
| No Lodging Reservations Made | - | - | - | - | 5% | 4% |
| No Answer | 3% | 4% | 6% | 6% | 2% | 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?




* Base: Among those staying in paid accommodations

## Travel Planning

### Devices Used to Access Destination Planning Information

| | 2015 | 2016 |
|---|---|---|
| Spring Season | A | B |
| **Total Respondents** | **932** | **935** |
| Any (NET) | 96% | 97% |
| Smartphone (iPhone, Blackberry, etc.) | 53% | 58%a |
| Laptop computer | 59% | 56% |
| Tablet (iPad, etc.) | 45% | 44% |
| Desktop computer | 43% | 43% |
| E-Reader (Nook, Kindle, etc.) | 4%b | 2% |
| Other portable device | 1% | 1% |
| None of these | 3% | 3% |
| No Answer | <1% | <1% |

Q5. Which of the following devices, if any, do you typically use to access destination planning information available online? (Please mark ALL that apply.)

### Travel Websites Visited

| | 2015 | 2016 |
|---|---|---|
| Spring Season | A | B |
| **Respondents who use devices to plan** | **898** | **905** |
| Visited web sites (NET) | 89% | 86% |
| Airline websites | 40% | 40% |
| Vacation rental websites | 22% | 29%a |
| Search Engines | 31% | 28% |
| Trip Advisor | 27%b | 23% |
| Booking websites | 25% | 23% |
| Hotel websites | 24% | 23% |
| www.FortMyers-Sanibel.com | 11% | 9% |
| Visit Florida | 12%b | 8% |
| Facebook | 7% | 6% |
| AAA | 8%b | 5% |
| Other | 9% | 10% |
| None/Didn't visit websites | 9% | 12% |
| No Answer | 2%a | 2% |

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

# Travel Planning

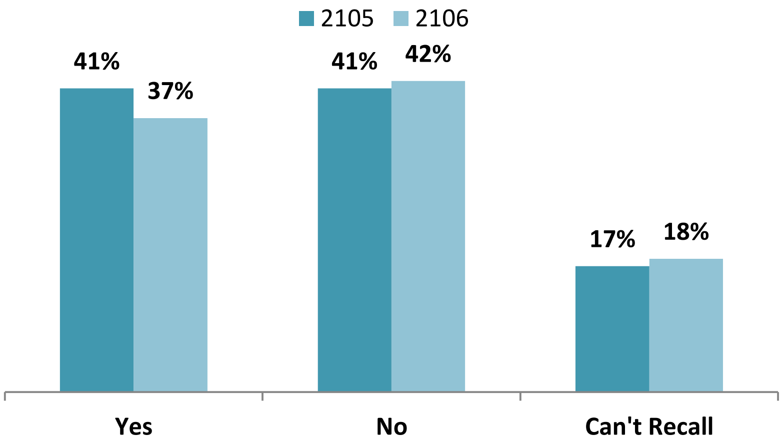
| Travel Information Requested | | |
|---|---|---|
| | 2015 | 2015 |
| Spring Season | A | B |
| **Total Respondents** | **932** | **935** |
| Requested information (NET) | 24% | 26% |
| *Hotel Web Site* | 9% | 10% |
| *VCB website* | 6% | 6% |
| *Call hotel* | 5% | 4% |
| *Visitor Guide* | 3% | 3% |
| *E-Newsletter* | 1% | 1% |
| *Call VCB* | <1% | 1% |
| *Magazine Reader Service Card* | 1% | 1% |
| *Call local Chamber of Commerce* | <1% | 1% |
| *Other* | 8% | 9% |
| None/Did not request information | 71%b | 66% |
| No Answer | 5% | 8%a |

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 |
| Spring Season | A | B |
| **Total Respondents** | **932** | **935** |
| Yes | 41% | 37% |
| No | 41% | 42% |
| Can't Recall | 17% | 18% |

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

**Recall of Lee County Promotions**

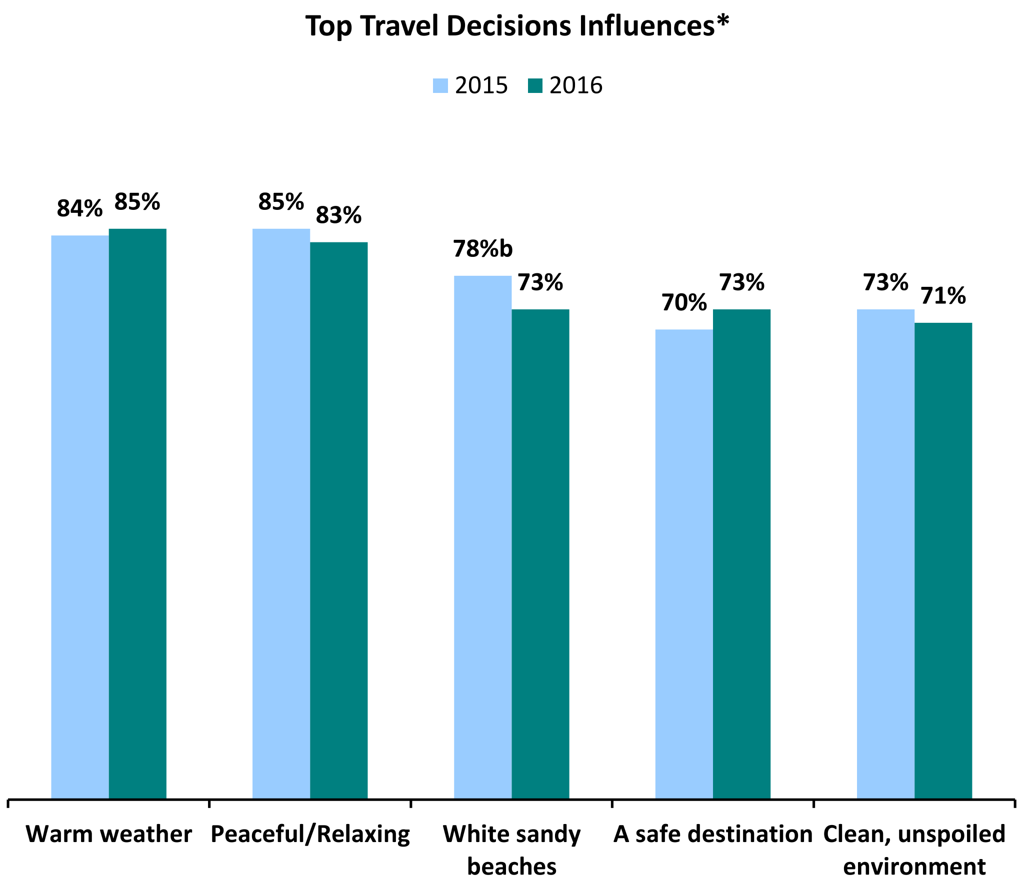


# Travel Planning

| Travel Decision Influences* | | |
|---|---|---|
| Spring Season | 2015 | 2016 |
| | A | B |
| **Total Respondents** | **932** | **935** |
| Warm weather | 84% | 85% |
| Peaceful/Relaxing | 85% | 83% |
| White sandy beaches | 78%b | 73% |
| A safe destination | 70% | 73% |
| Clean, unspoiled environment | 73% | 71% |
| Convenient location | 67% | 66% |
| Good value for the money | 64% | 63% |
| Plenty to see and do | 63% | 60% |
| Reasonably priced lodging | 58% | 54% |
| A "family" atmosphere | 52% | 53% |
| Affordable dining | 55% | 53% |
| Upscale accommodations | 48% | 45% |

Q9: When you were talking about coming to Lee County, if one (1) is "Not at All Influential" and five (5) is "Definitely Influential," how strongly did the following influence your selection?

** Percentages shown reflect top 2 box scores (rating of 4 or 5)*



# Trip Profile

| Mode of Transportation | | |
|---|---|---|
| Spring Season | 2015 | 2016 |
| | A | B |
| **Total Respondents** | **932** | **935** |
| Fly | 73% | 71% |
| Drive a personal vehicle | 23% | 23% |
| Drive a rental vehicle | 3% | 4% |
| Drive an RV | 1% | 1% |
| Travel by bus | <1% | <1% |
| Other/No Answer | <1% | 1% |

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

| Airport Used | | |
|---|---|---|
| Spring Season | 2015 | 2016 |
| | A | B |
| **Respondents who flew** | **678** | **668** |
| SW Florida Int'l (Fort Myers) | 81% | 85%a |
| Punta Gorda | 5% | 5% |
| Tampa Int'l | 6%b | 3% |
| Miami Int'l | 4%b | 2% |
| Orlando Int'l | 2% | 2% |
| Ft. Lauderdale Int'l | 1% | 2% |
| Other/No Answer | 2% | 1% |

Q2: At which Florida airport did you land?

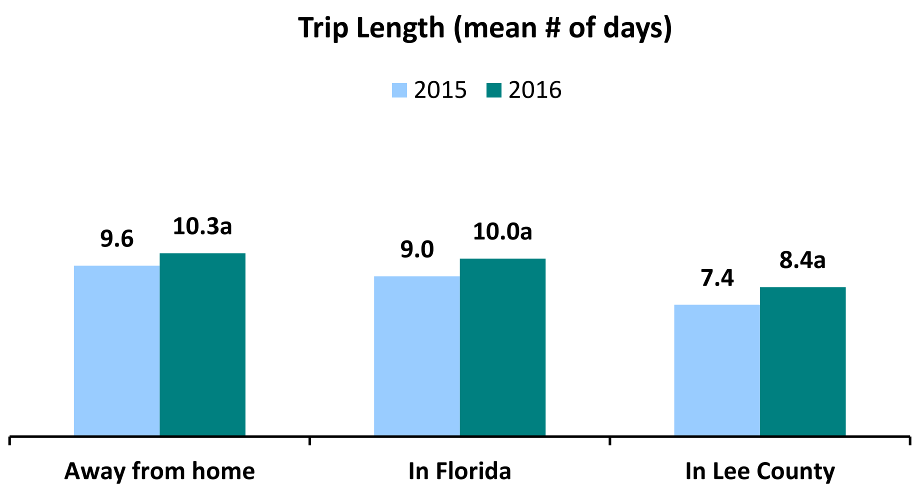
| Frequency of Using SWFL Int'l (Past Year) | | |
|---|---|---|
| Spring Season | 2015 | 2016 |
| **Total Respondents** | **932** | **935** |
| One or more trips | 57% | 59% |
| 1 trip | 39% | 40% |
| 2 to 3 trips | 13% | 16%a |
| 4 to 5 trips | 3% | 3% |
| 6 or more trips | 2% | 1% |
| None/No Answer | 43% | 41% |

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

# Trip Profile

| Trip Length<br>Mean # of Days | | |
|---|---|---|
| **Spring Season** | **2015** | **2016** |
| | **A** | **B** |
| **Total Respondents** | **932** | **935** |
| Away from home | 9.6 | 10.3a |
| In Florida | 9.0 | 10.0a |
| In Lee County | 7.4 | 8.4a |

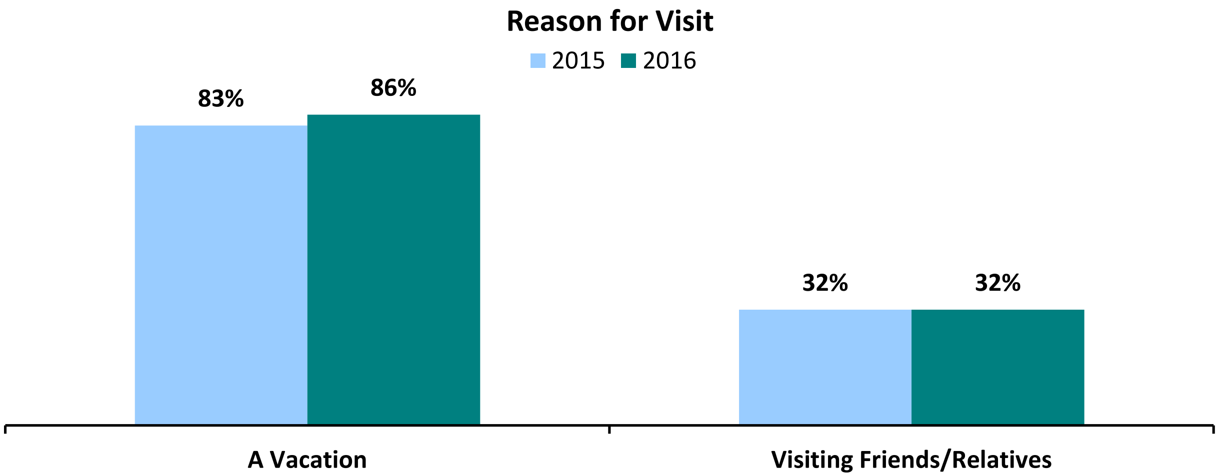
Q4a/b/c: On this trip, how many days will you be:



## Trip Profile

| Reason(s) for Visit | | |
|---|---|---|
| Spring Season | 2015 | 2016 |
| | A | B |
| **Total Respondents** | **932** | **935** |
| A Vacation | 83% | 86% |
| Visiting Friends/Relatives | 32% | 32% |
| Personal Business | 2% | 2% |
| Sporting Event(s) | 2% | 2% |
| A Conference/Meeting | 1% | 1% |
| Other Business Trip | <1% | 1%a |
| A Convention/Trade Show | <1% | <1% |
| Other/No Answer (NET) | 3% | 2% |

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






dpa Davidson Peterson Associates

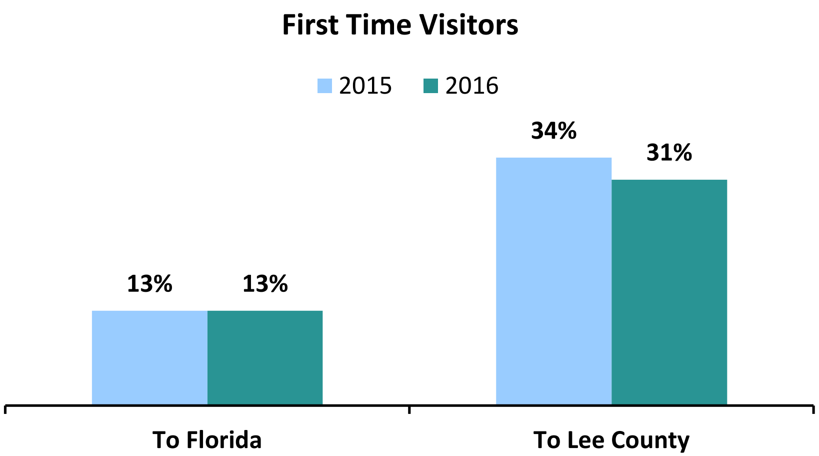
# Trip Profile

| First Time Visitors to Lee County | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Total | | Florida Residents | | Out-of-State Residents | | International Visitors | |
| Spring Season | 2015 | 2016 | 2015 | 2016 | 2015 | 2016 | 2015 | 2016 |
| | B | B | A | B | A | B | A | B |
| **Total Respondents** | 932 | 935 | 49* | 43* | 557 | 535 | 172 | 201 |
| First-time visitor | 34% | 31% | 12% | 12% | 29% | 27% | 58% | 54% |
| Repeat visitor | 63% | 67% | 84% | 86% | 68% | 72% | 40% | 44% |
| No Answer | 3% | 1% | 4% | 2% | 3% | 1% | 2% | 1% |

Q15: Is this your first visit to Lee County?
**Note: Small sample size. (N<70)  Please interpret results with caution.*
***N/A:  Insufficient number of responses for statistical analysis (N<30).*

| First Time Visitors to Florida | | |
|---|---|---|
| Spring Season | 2015 | 2016 |
| **Total Respondents** | 932 | 935 |
| | A | B |
| Yes, first-time visitor | 13% | 13% |
| No | 79% | 81% |
| No answer | 2% | 1% |
| *FL Residents** | 5% | 5% |

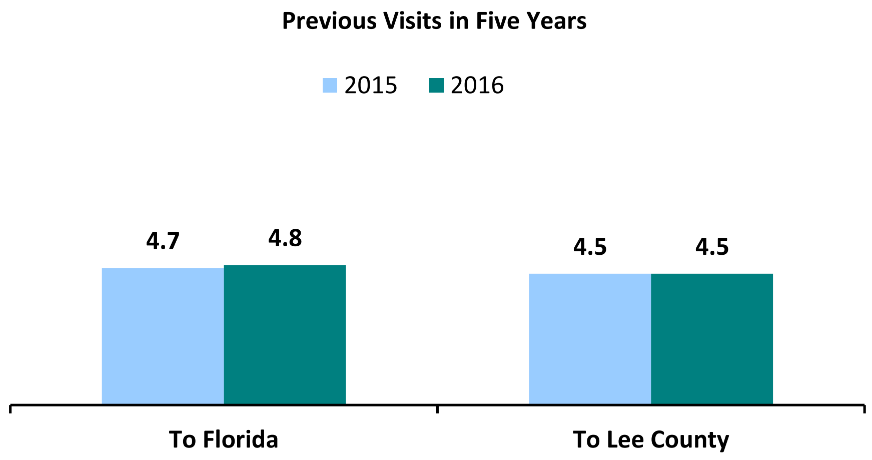
Q13: Is this your first visit to Florida?
**Florida residents are shown as A proportion of total visitor interviews conducted, though FL residents are not asked this question .*



## Trip Profile

| Previous Visits in Five Years | | | | |
|---|---|---|---|---|
| Spring Season | Mean # of Visits to Florida | | Mean # of Visits to Lee County | |
| | 2015 | 2016 | 2015 | 2016 |
| | A | B | A | B |
| Base: Repeat Visitors | **738**(FL res. Excl) | **754**(FL res. Excl) | **591** | **630** |
| Number of visits | 4.7 | 4.8 | 4.5 | 4.5 |

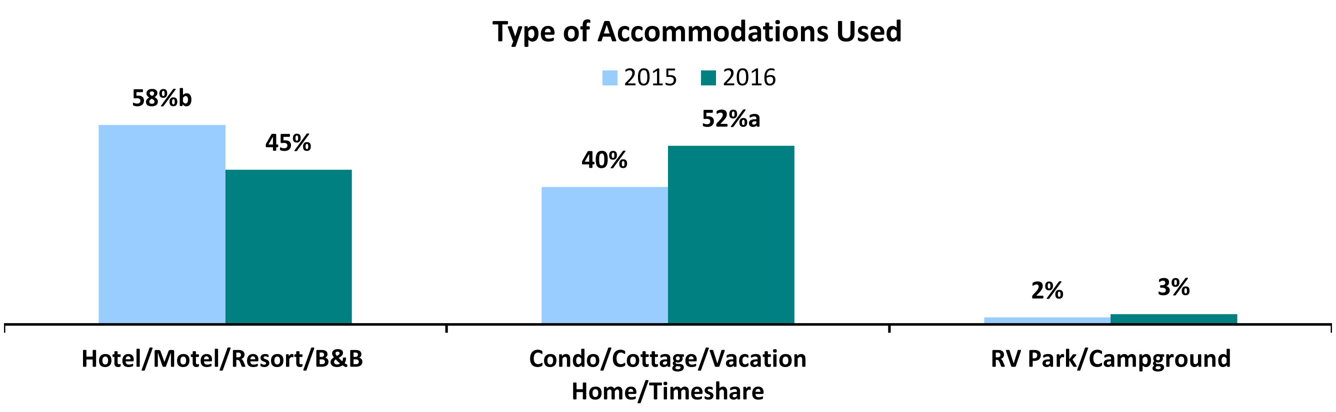
Q14: Over the past five (5) years, how many times have you visited Florida?
Q16: Over the past five (5) years, how many times have you visited Lee County?



## Trip Profile

| Type of Accommodations Used | | |
|---|---|---|
| Spring Season | 2015 | 2016 |
| | A | B |
| **Total respondents staying in paid accommodations** | **583** | **571** |
| **Hotel/Motel/Resort/B&B (NET)** | 58%b | 45% |
| At a hotel/motel/historic inn | 40%b | 27% |
| At a resort | 18% | 17% |
| At a Bed and Breakfast | <1% | 1% |
| **Condo/Cottage/Vacation Home/Timeshare (NET)** | 40% | 52%a |
| **RV Park/Campground (NET)** | 2% | 3% |

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



## Trip Profile

| Quality of Accommodations | | |
|---|---|---|
| Spring Season | 2015 | 2016 |
| | A | B |
| **Total respondents staying in paid accommodations** | **583** | **571** |
| Far exceeded/Exceeded expectations | 38% | 39% |
| Met your expectations | 56% | 52% |
| Did not meet/Far below expectations | 4% | 3% |
| No Answer | 2% | 5%a |

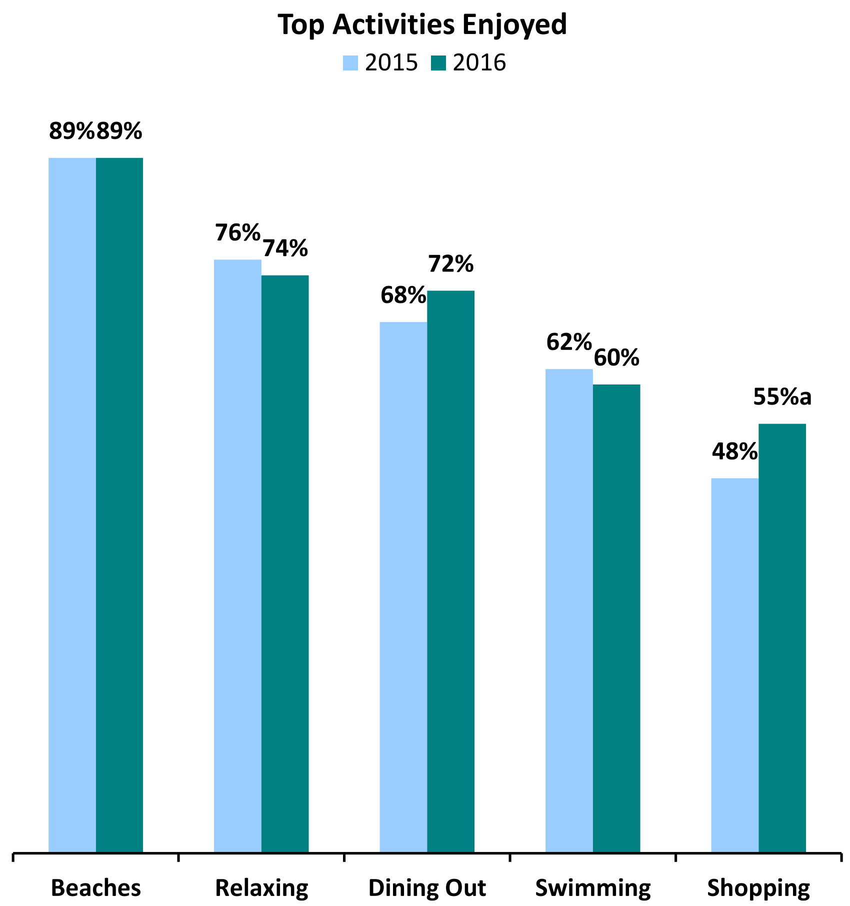
Q21: How would you describe the quality of your accommodations? Do you feel they:

| Ratings by Subgroup | First-Timers | | Repeaters | | U.S. Residents | | International Residents | |
|---|---|---|---|---|---|---|---|---|
| Spring Season | 2015 | 2016 | 2015 | 2016 | 2015 | 2016 | 2015 | 2016 |
| | B | B | A | B | A | B | A | B |
| **Total respondents staying in paid accommodations** | **317** | **292** | **591** | **630** | **746** | **726** | **172** | **201** |
| Far exceeded/Exceeded expectations | 36% | 37% | 45% | 47% | 45% | 46% | 27% | 33% |
| Met your expectations | 43% | 42% | 49%b | 42% | 46%b | 40% | 51% | 47% |
| Did not meet/Far below expectations | 5% | 2% | 2% | 3% | 3% | 3% | 2% | 3% |
| No Answer | 16% | 19% | 5% | 9%a | 6% | 11%a | 20% | 16% |

## Trip Activities

| Activities Enjoyed | | |
|---|---|---|
| Spring Season | 2015 | 2016 |
| | A | B |
| **Total Respondents** | **932** | **935** |
| Beaches | 89% | 89% |
| Relaxing | 76% | 74% |
| Dining Out | 68% | 72% |
| Swimming | 62% | 60% |
| Shopping | 48% | 55%a |
| Shelling | 40% | 37% |
| Sightseeing | 43%b | 37% |
| Visiting Friends/Relatives | 30% | 33% |
| Watching Wildlife | 26% | 29% |
| Bicycle Riding | 15% | 25%a |
| Photography | 19% | 22%a |
| Attractions | 27%b | 22% |
| Exercise/Working Out | 13% | 20%a |
| Birdwatching | 16% | 17% |
| Fishing | 11% | 13% |
| Golfing | 9% | 12%a |
| Bars/Nightlife | 13% | 12% |
| Boating | 12% | 11% |
| Kayaking/Canoeing | 7% | 9% |
| Miniature Golf | 7% | 9%a |
| Guided Tour | 9% | 9% |
| Parasailing/Jet Skiing | 6% | 6% |
| Cultural Events | 5% | 6% |
| Sporting Event | 5% | 5% |
| Scuba Diving/Snorkeling | 2% | 4% |
| Tennis | 3% | 3% |
| Other | 2% | 3% |
| No Answer | 2% | 2% |

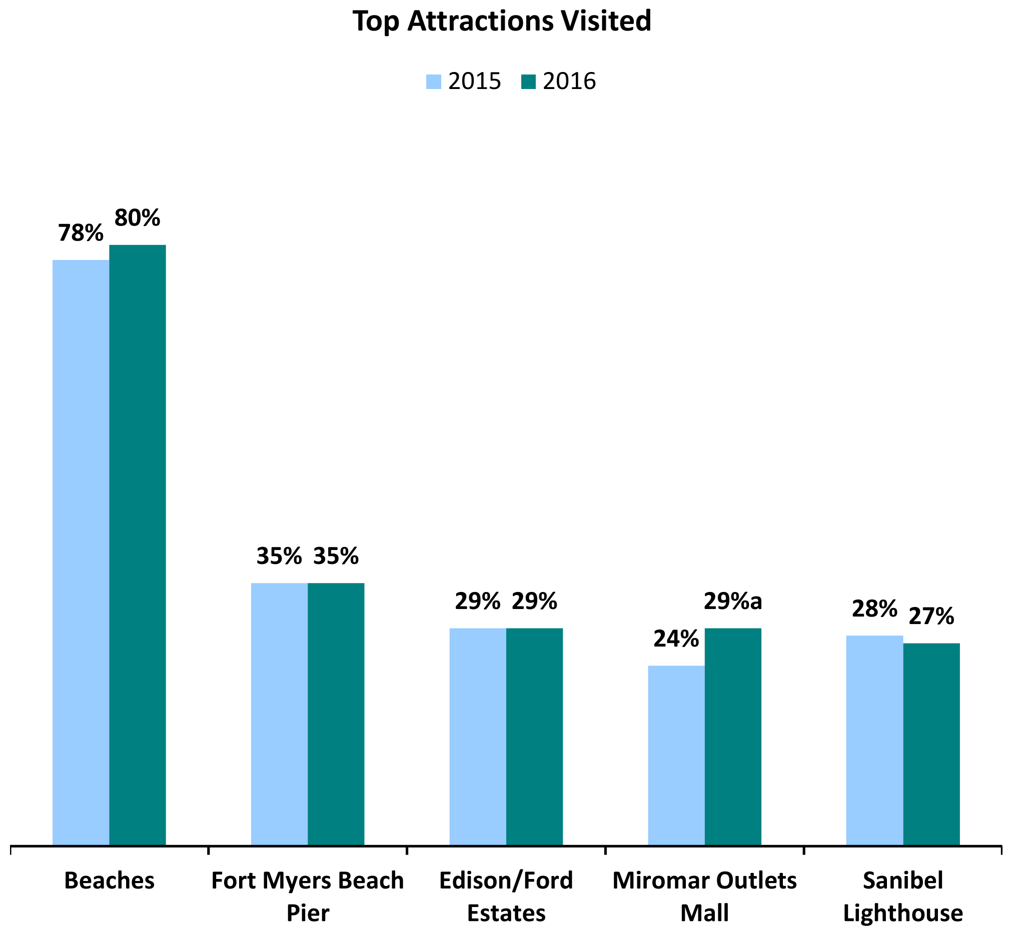
Q23: What activities or interests are you enjoying while in Lee County?
*(Please mark ALL that apply.)*



# Trip Activities

| Attractions Visited | | |
|---|---|---|
| Spring Season | 2015 | 2016 |
| | A | B |
| **Total Respondents** | **932** | **935** |
| Beaches | 78% | 80% |
| Fort Myers Beach Pier | 35% | 35% |
| Edison/Ford Estates | 29% | 29% |
| Miromar Outlets Mall | 24% | 29%a |
| Sanibel Lighthouse | 28% | 27% |
| Ding Darling National Wildlife Refuge | 16% | 15% |
| Tanger Outlet Center | 18%b | 14% |
| Periwinkle Place | 12% | 13% |
| Coconut Point Mall | 10% | 11% |
| Shell Factory and Nature Park | 7% | 10%a |
| Gulf Coast Town Center | 7% | 10% |
| Bell Tower Shops | 6% | 8% |
| Edison Mall | 5% | 6% |
| Manatee Park | 4% | 4% |
| Bailey-Matthews Shell Museum | 3% | 3% |
| Broadway Palm Dinner Theater | 1% | 2%a |
| Barbara B. Mann Performing Arts Hall | 1% | 2% |
| Babcock Wilderness Adventures | 1% | 1% |
| Other | 5% | 6% |
| None/No Answer (NET) | 4% | 5% |

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

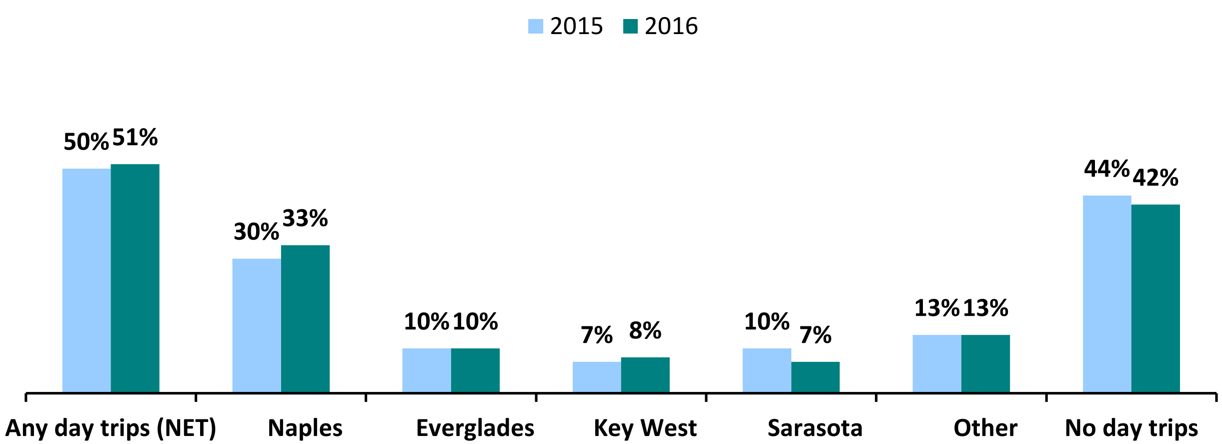


# Trip Activities

| Day Trips Outside Lee County | | |
|---|---|---|
| **Spring Season** | **2015** | **2016** |
| | **A** | **B** |
| **Total Respondents** | **932** | **935** |
| Any day trips (NET) | 50% | 51% |
| *Naples* | 30% | 33% |
| *Everglades* | 10% | 10% |
| *Key West* | 7% | 8% |
| *Sarasota* | 10% | 7% |
| *Other* | 13% | 13% |
| No day trips | 44% | 42% |
| No Answer | 14% | 15% |

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

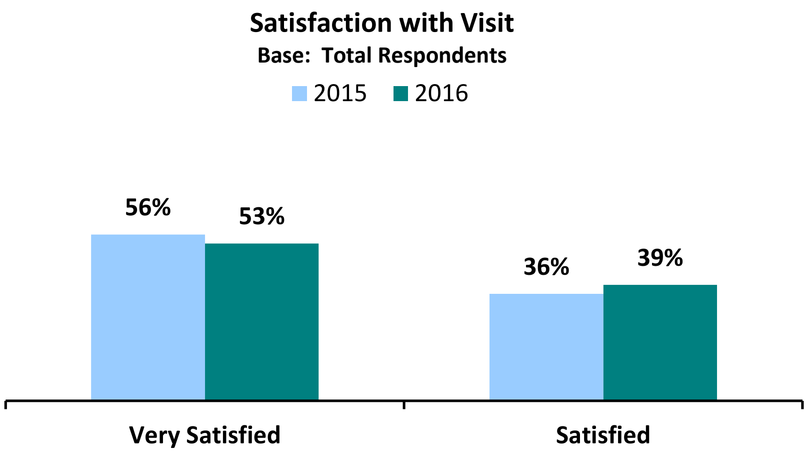
**Day Trips Outside Lee County**



# Lee County Experience

| Satisfaction with Visit | | |
|---|---|---|
| | Total Respondents | |
| Spring Season | 2015 | 2016 |
| | A | B |
| **Total Respondents** | **932** | **935** |
| Very Satisfied/Satisfied | 91% | 92% |
| *Very Satisfied* | 56% | 53% |
| *Satisfied* | 36% | 39% |
| Neither | 2% | 2% |
| Dissatisfied/Very Dissatisfied | <1% | 1%a |
| 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 | |
| Spring Season | 2015 | 2016 | 2015 | 2016 | 2015 | 2016 | 2015 | 2016 |
| | B | B | A | B | A | B | A | B |
| **Total Respondents** | **317** | **292** | **591** | **630** | **746** | **726** | **172** | **201** |
| Very Satisfied/Satisfied | 86% | 88% | 94% | 94% | 92% | 92% | 89% | 94% |
| *Very Satisfied* | 39% | 34% | 65% | 63% | 61% | 59% | 32% | 35% |
| *Satisfied* | 47% | 55% | 30% | 31% | 31% | 33% | 58% | 60% |

## Future Plans

| Likelihood to Recommend/Return to Lee County | | |
|---|---|---|
| **Spring Season** | **2015** | **2016** |
| | **A** | **B** |
| **Total Respondents** | **932** | **935** |
| Likely to Recommend Lee County | 83% | 84% |
| Likely to Return to Lee County | 86% | 86% |
| **Base: Total Respondents Planning to Return** | **801** | **808** |
| Likely to Return Next Year | 54% | 56% |

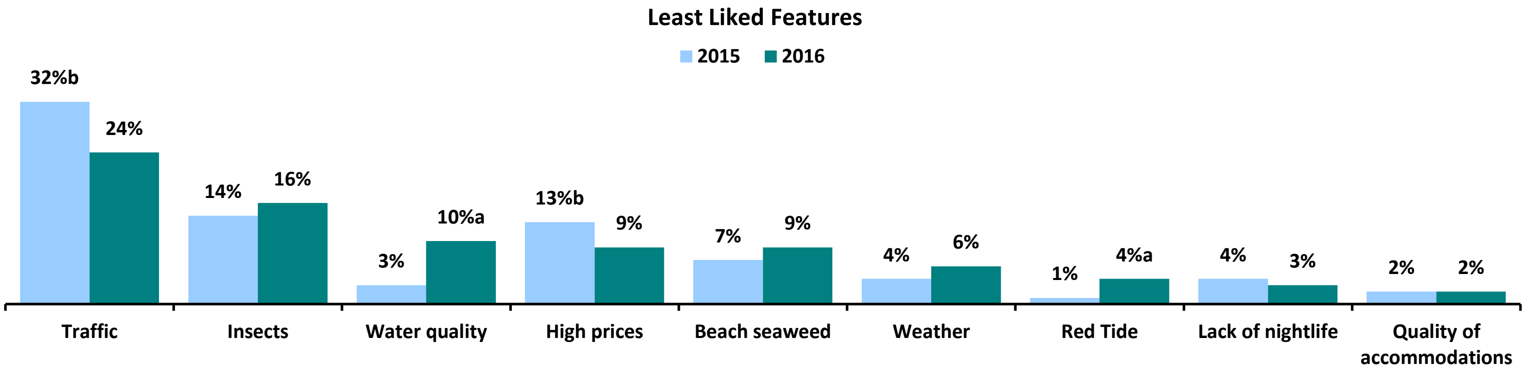
Q27: Would you recommend Lee County to A friend over other vacation areas in Florida?
Q31: Will you come back to Lee County?
Q32: Will you come back next year?

| Ratings by Subgroup | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | **First-Timers** | | **Repeaters** | | **U.S. Residents** | | **International Residents** | |
| **Spring Season** | **2015** | **2016** | **2015** | **2016** | **2015** | **2016** | **2015** | **2016** |
| | **A** | **B** | **A** | **B** | **A** | **B** | **A** | **B** |
| **Total Respondents** | **317** | **292** | **591** | **630** | **746** | **726** | **172** | **201** |
| Likely to Recommend Lee County | 71% | 77% | 90% | 87% | 85% | 84% | 75% | 84%a |
| Likely to Return to Lee County | 75% | 78% | 92% | 91% | 87% | 88% | 83% | 83% |
| **Base: Total Respondents Planning to Return** | **237** | **226** | **545** | **572** | **651** | **637** | **143** | **167** |
| Likely to Return Next Year | 29% | 37% | 65% | 63% | 56% | 57% | 44% | 52% |

## Trip Activities

| Least Liked Features | | |
|---|---|---|
| Spring Season | 2015 | 2016 |
| | A | B |
| **Total Respondents** | **932** | **935** |
| Traffic | 32%b | 24% |
| Insects | 14% | 16% |
| Water quality | 3% | 10%a |
| High prices | 13%b | 9% |
| Beach seaweed | 7% | 9% |
| Weather | 4% | 6% |
| Red Tide | 1% | 4%a |
| Lack of nightlife | 4% | 3% |
| Quality of accommodations | 2% | 2% |
| Other | 4% | 6%a |
| Nothing/No Answer (NET) | 39% | 39% |

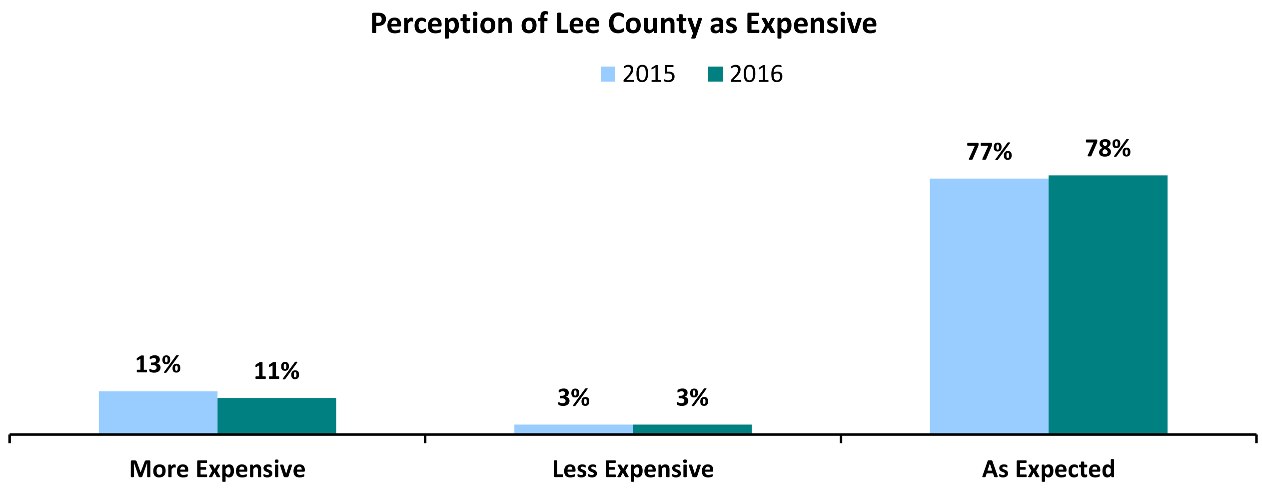
Q29: During this specific visit, which features have you liked **LEAST** about our area? (*Please mark ALL that apply.)*



## Trip Activities

| Perception of Lee County as Expensive | | |
|---|---|---|
| **Spring Season** | **2015** | **2016** |
| | **A** | **B** |
| **Total Respondents** | **932** | **935** |
| More Expensive | 13% | 11% |
| Less Expensive | 3% | 3% |
| As Expected | 77% | 78% |
| Don't know/No Answer (NET) | 7% | 6% |

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



# Visitor and Travel Party Demographic Profile

## Visitor Demographic Profile

| Spring Season | 2015 | 2016 |
|---|---|---|
| | A | B |
| **Total Respondents** | **932** | **935** |
| Age of respondent (mean) | 52.2 | 51.5 |
| Annual household income (mean) | $100,152 | $102,218 |
| Martial Status | | |
| Married | 75% | 74% |
| Single | 12% | 14% |
| Vacations per year (mean) | 3.0 | 3.1 |
| Short getaways per year (mean) | 3.7 | 3.9 |

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

| Spring Season | 2015 | 2016 |
|---|---|---|
| | A | B |
| **Total Respondents** | **932** | **935** |
| Couple | 44%b | 39% |
| Family | 32% | 37%a |
| Group of couples/friends | 13% | 14% |
| Single | 8% | 6% |
| | | |
| Mean travel party size | 2.9 | 3.3a |
| Mean adults in travel party | 2.5 | 2.8a |

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

## Travel Parties with Children

| Spring Season | 2015 | 2015 |
|---|---|---|
| | A | B |
| **Total Respondents** | **932** | **935** |
| Traveling with any Children (net) | 21% | 25%a |
| Any younger than 6 | 7% | 10%a |
| Any ages 6-11 | 9% | 12% |
| Any 12-17 years old | 11% | 12% |
| No Children | 79%b | 75% |

Q19: How many of those people are:
Younger than 6 years old/ 6-11 years old/ 12-17 years old/ Adults

THE BEACHES OF FORT MYERS AND SANIBEL

# Visitor Origin and Visitation Estimates

## Total Visitation

| | % | | Visitor Estimates | | |
|---|---|---|---|---|---|
| **Spring Season** | **2015** | **2016** | **2015** | **2016** | **% Change** |
| Paid Accommodations | 61% | 63% | 795,752 | 819,406 | 3.0% |
| Friends/Relatives | 39% | 37% | 504,111 | 487,515 | -3.3% |
| **Total Visitation** | | | **1,299,863** | **1,306,921** | **0.5%** |

## Visitor Origin (Paid Accommodation Guests)

| Spring Season | % | | Visitor Estimates | | |
|---|---|---|---|---|---|
| **Country of Origin** | **2015** | **2016** | **2015** | **2016** | **% Change** |
| United States | 83% | 77% | 661,278 | 628,645 | -4.9% |
| Germany | 5% | 11% | 40,203 | 88,155 | 119.3% |
| UK | 4% | 5% | 29,113 | 41,910 | 44.0% |
| Canada | 6% | 4% | 48,521 | 30,348 | -37.5% |
| Scandinavia | 1% | 2% | 5,545 | 15,897 | 186.7% |
| BeNeLux | 1% | 1% | 4,159 | 7,226 | 73.7% |
| France | <1% | <1% | 2,773 | 2,890 | 4.2% |
| Switzerland | <1% | <1% | 1,386 | 2,890 | 108.5% |
| Latin America | <1% | - | 1,386 | - | - |
| Other International | <1% | <1% | 1,386 | 1,445 | 4.2% |

| U.S. Region of Origin | 2015 | 2016 | 2015 | 2016 | % Change |
|---|---|---|---|---|---|
| Florida | 9% | 8% | 59,345 | 51,169 | -13.8% |
| South (including Florida) | 23% | 24% | 152,603 | 148,024 | -3.0% |
| Midwest | 46% | 46% | 303,510 | 286,911 | -5.5% |
| Northeast | 26% | 25% | 174,645 | 158,989 | -9.0% |
| West | 5% | 6% | 30,521 | 34,722 | 13.8% |

## Spring 2016 Top DMAs (Paid Accommodations)

| | | |
|---|---|---|
| Indianapolis | 7% | 45,686 |
| Boston (Manchester, NH) | 6% | 36,549 |
| Chicago | 5% | 32,894 |
| New York | 5% | 31,067 |
| Detroit | 4% | 27,412 |
| Cleveland-Akron (Canton) | 3% | 21,929 |
| Tampa-Saint Petersburg (Sarasota) | 3% | 16,447 |
| Denver | 3% | 16,447 |
| Atlanta | 3% | 16,447 |
| Cincinnati | 3% | 16,447 |
| Saint Louis | 3% | 16,447 |
| Minneapolis-Saint Paul | 3% | 16,447 |

**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
## Spring 2016

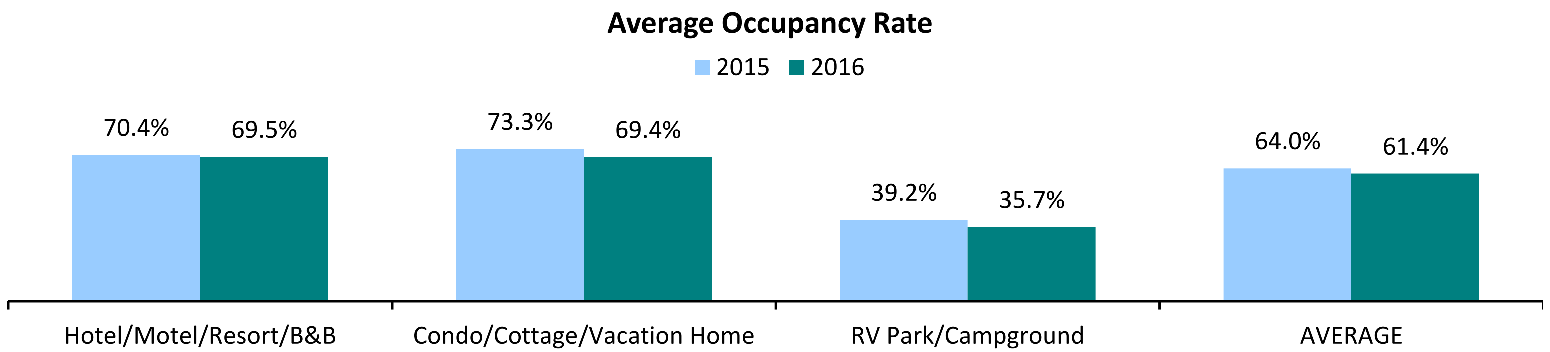
*For the 2016 spring season, property managers were interviewed in July 2016 to provide data for each specific month of the season (April, May, and June 2016).*

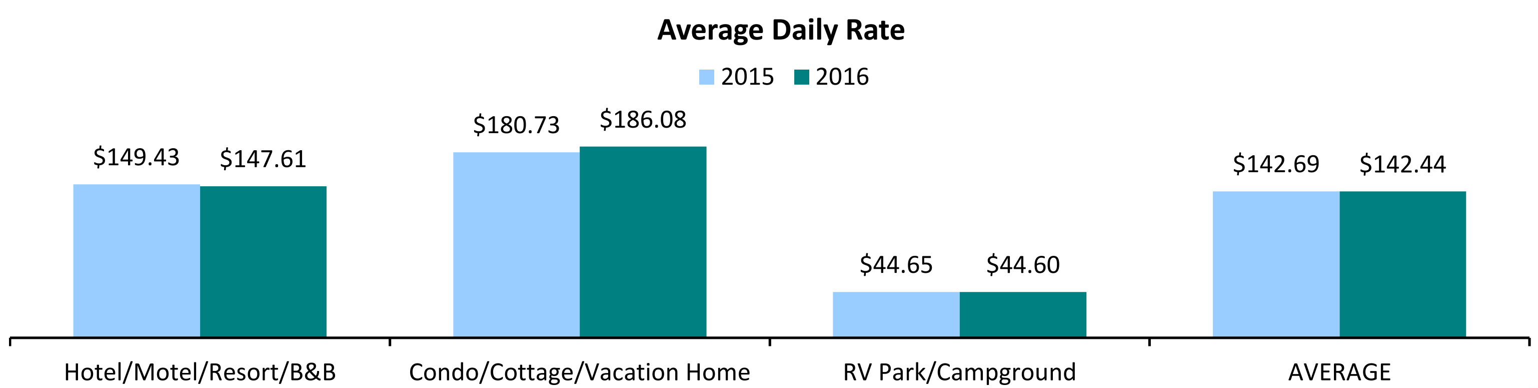
*For the 2015 spring season, property managers were interviewed in July 2015 to provide data for each specific month of the season (April, May, and June 2015).*

# Occupancy/Daily Rates

| | Average Occupancy Rate | | | Average Daily Rate | | | RevPAR | | |
|---|---|---|---|---|---|---|---|---|---|
| **Spring Season** | **2015** | **2016** | **% Change** | **2015** | **2016** | **% Change** | **2015** | **2016** | **% Change** |
| Hotel/Motel/Resort/B&B | 70.4% | 69.5% | -1.3% | $149.43 | $147.61 | -1.2% | $105.16 | $102.65 | -2.4% |
| Condo/Cottage/Vacation Home | 73.3% | 69.4% | -5.3% | $180.73 | $186.08 | 3.0% | $132.47 | $129.19 | -2.5% |
| RV Park/Campground | 39.2% | 35.7% | -8.9% | $44.65 | $44.60 | -0.1% | $17.49 | $15.93 | -8.9% |
| **AVERAGE** | **64.0%** | **61.4%** | **-4.1%** | **$142.69** | **$142.44** | **-0.2%** | **$91.34** | **$87.48** | **-4.2%** |

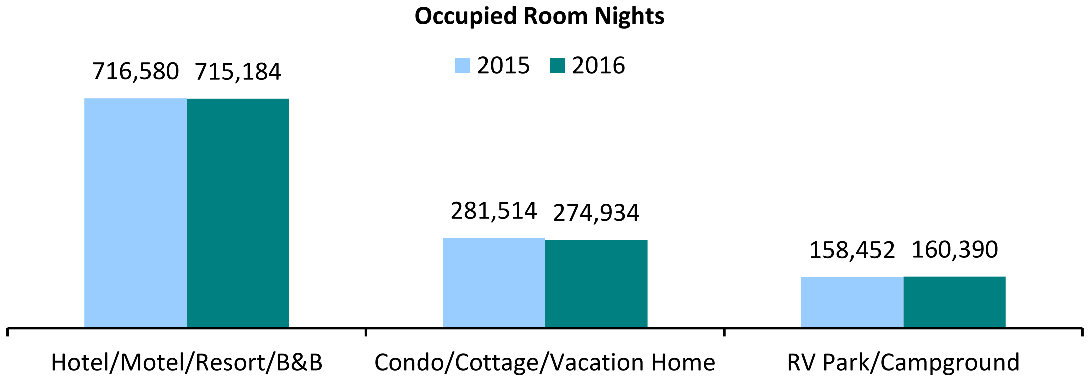
Q16: What was your overall average occupancy rate for the month of [April/May/June]?
Q17: What was your average daily rate (ADR) in [April/May/June]?

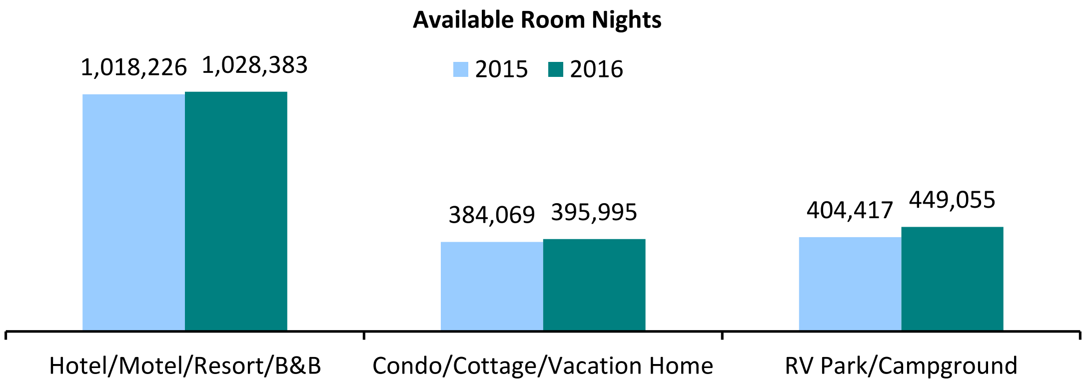


## Room/Unit/Site Nights

| | Occupied Room Nights | | | Available Room Nights | | |
|---|---|---|---|---|---|---|
| **Spring Season** | **2015** | **2016** | **% Change** | **2015** | **2016** | **% Change** |
| Hotel/Motel/Resort/B&B | 716,580 | 715,184 | -0.2% | 1,018,226 | 1,028,383 | 1.0% |
| Condo/Cottage/Vacation Home | 281,514 | 274,934 | -2.3% | 384,069 | 395,995 | 3.1% |
| RV Park/Campground | 158,452 | 160,390 | 1.2% | 404,417 | 449,055 | 11.0% |
| **Total** | **1,156,546** | **1,150,508** | **-0.5%** | **1,806,712** | **1,873,433** | **3.7%** |



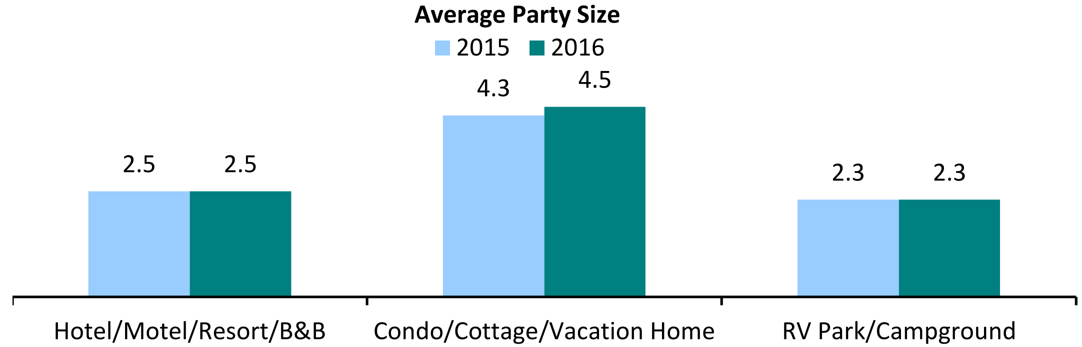



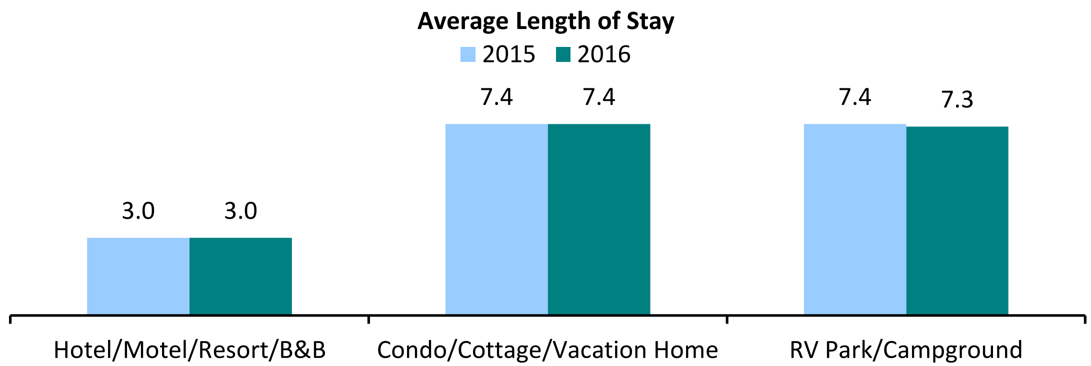
## Average Party Size and Length of Stay

| | Average Party Size | | | Average Length of Stay | | |
|---|---|---|---|---|---|---|
| **Spring Season** | **2015** | **2016** | **% Change** | **2015** | **2016** | **% Change** |
| Hotel/Motel/Resort/B&B | 2.5 | 2.5 | 1.6% | 3.0 | 3.0 | 0.3% |
| Condo/Cottage/Vacation Home | 4.3 | 4.5 | 3.6% | 7.4 | 7.4 | 0.7% |
| RV Park/Campground | 2.3 | 2.3 | 1.4% | 7.4 | 7.3 | -1.3% |
| **Average** | **2.9** | **3.0** | **2.4%** | **4.2** | **4.2** | **-0.8%** |

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

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

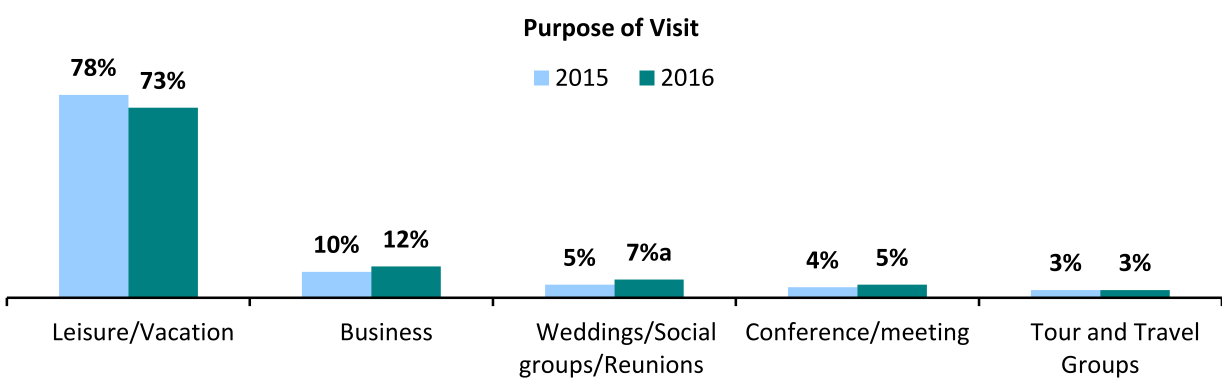


## Lodging Management Estimates

| Guest Profile | | |
|---|---|---|
| Spring Season | 2015 | 2016 |
| | A | B |
| **Total Number of Responses** | **98** | **124** |
| Purpose of Visit | | |
| Leisure/Vacation | 78% | 73% |
| Business | 10% | 12% |
| Weddings/Social groups/Reunions (net) | 5% | 7%a |
| Conference/meeting | 4% | 5% |
| Tour and Travel Groups | 3% | 3% |

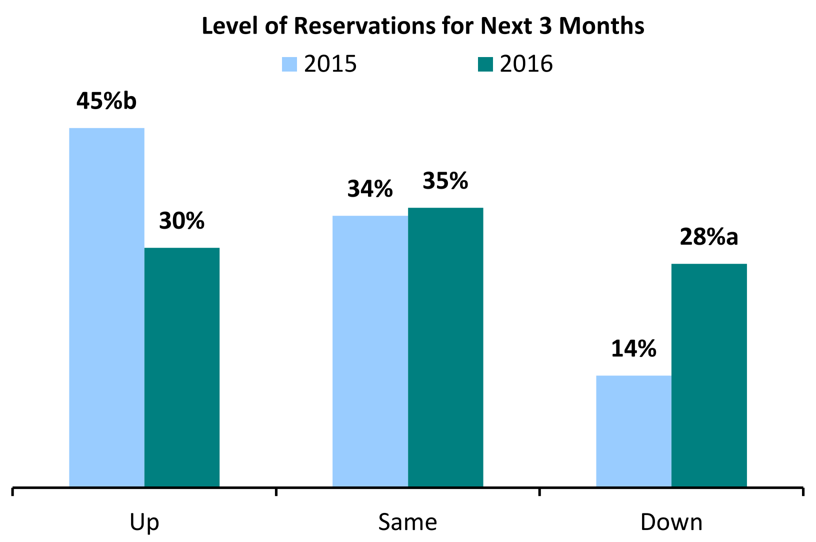
Q22: What percent of your [April/May/June] room/site/unit occupancy do you estimate was generated by:



## Occupancy Barometer

| Level of Reservations for Next 3 Months Compared to Last Year | | |
|---|---|---|
| Spring Season | 2015 | 2016 |
| | A | B |
| **Total Respondents** | **106** | **129** |
| Up/Same (net) | 79%b | 65% |
| Up | 45%b | 30% |
| Same | 34% | 35% |
| Down | 14% | 28%a |
| No Answer | 7% | 7% |

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



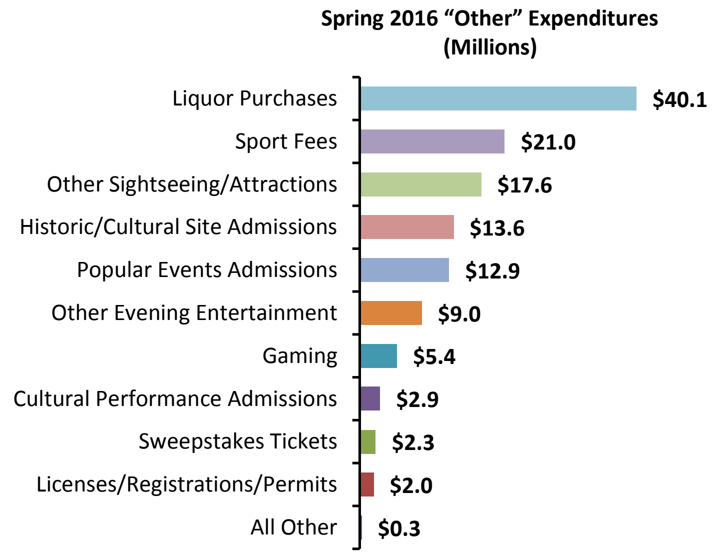

***Note: Only includes those property managers interviewed in July 2015 for direct comparability to those interviewed in July 2016.**

## Economic Impact Analysis
## Spring 2016

# Total Visitor Expenditures by Spending Category

| TOTAL EXPENDITURES | | | |
|---|---|---|---|
| Spring Season | 2015 | 2016 | % Change |
| TOTAL | $705,436,023 | $704,543,424 | -0.1% |
| Food and Beverages | $181,079,345 | $180,938,185 | -0.1% |
| Shopping | $174,206,153 | $170,637,866 | -2.0% |
| Lodging Accommodations | $165,032,182 | $163,880,941 | -0.7% |
| Ground Transportation | $63,643,535 | $61,822,886 | -2.9% |
| Other | $121,474,808 | $127,263,546 | 4.8% |

(Note: Other includes the categories detailed below.)




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

# Total Visitor Expenditures by Lodging Type

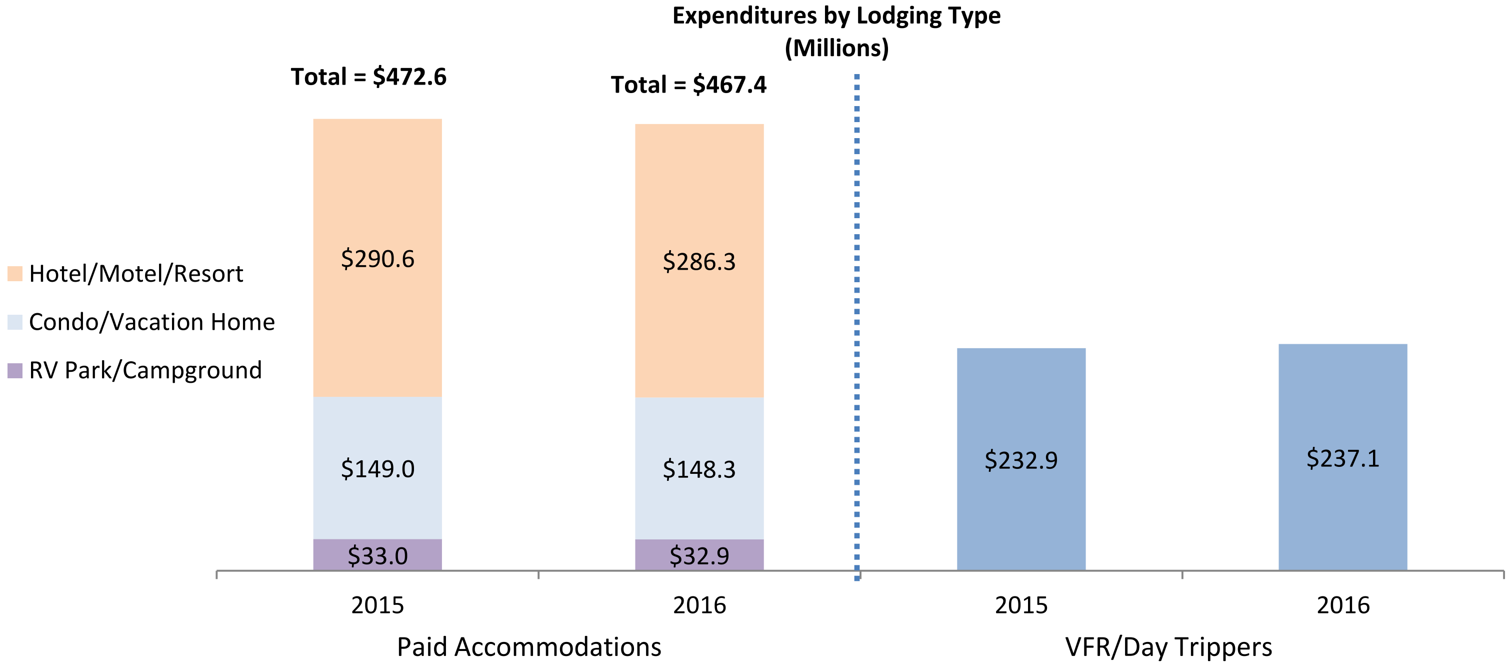
| TOTAL EXPENDITURES | | | | | | |
|---|---|---|---|---|---|---|
| | Staying Paid Accommodations | | | Visiting Friends and Relatives/Day Trippers | | |
| **Spring Season** | **2015** | **2016** | **% Change** | **2015** | **2016** | **% Change** |
| TOTAL | $472,583,652 | $467,435,888 | -1.1% | $232,852,371 | $237,107,536 | 1.8% |
| Lodging Accommodations | $165,032,182 | $163,880,941 | -0.7% | $0 | $0 | - |
| Food and Beverages | $105,140,451 | $102,793,312 | -2.2% | $75,938,894 | $78,144,873 | 2.9% |
| Shopping | $95,321,281 | $93,514,694 | -1.9% | $78,884,872 | $77,123,172 | -2.2% |
| Ground Transportation | $37,905,623 | $37,186,115 | -1.9% | $25,737,912 | $24,636,771 | -4.3% |
| Other | $69,184,115 | $70,060,826 | 1.3% | $52,290,693 | $57,202,720 | 9.4% |

“Other ” includes the following categories:

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

# Total Visitor Expenditures by Lodging Type

| Total Expenditures by Lodging Type | | | | | |
|---|---|---|---|---|---|
| Spring Season | 2015 | 2016 | % Change | 2015 | 2016 |
| TOTAL | $705,436,023 | $704,543,424 | -0.1% | 100% | 100% |
| Visiting Friends & Relatives/Day Trippers | $232,852,371 | $237,107,536 | 1.8% | 33% | 34% |
| Paid Accommodations | $472,583,652 | $467,435,888 | -1.1% | 67% | 66% |
| *Hotel/Motel/Resort/B&B* | *$290,582,343* | *$286,322,951* | -1.5% | 41% | 41% |
| *Condo/Cottage/Vacation Home* | *$149,035,835* | *$148,253,048* | -0.5% | 21% | 21% |
| *RV Park/Campground* | *$32,965,474* | *$32,859,889* | -0.3% | 5% | 5% |



# 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.

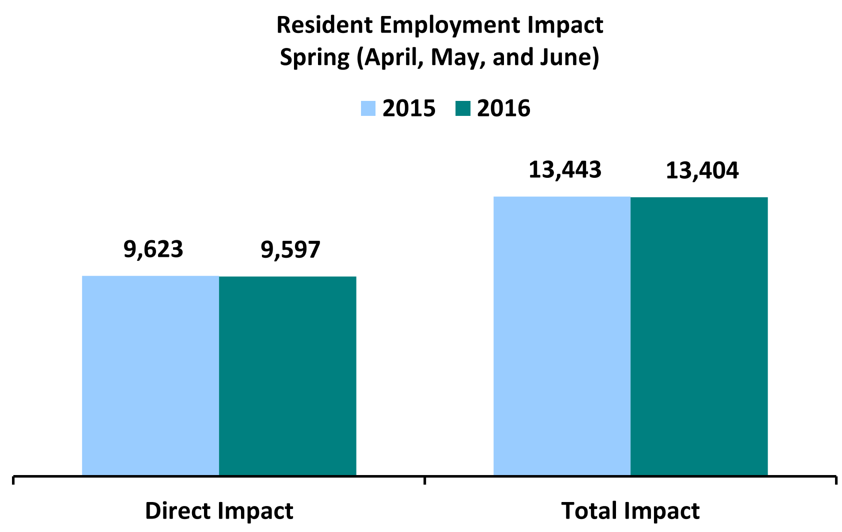
## Impact on Jobs for Lee County Residents

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

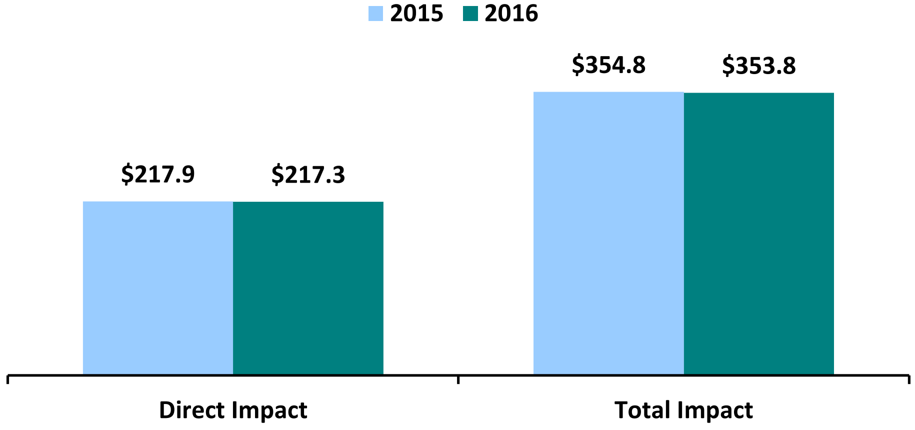
As stated earlier, in order to produce the output (food, lodging, entertainment, etc.) purchased by visitors, businesses have to employ people. This requires business owners to pay wages and salaries to their employees, and also includes proprietary income for the business owner in some cases.

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.).

**Resident Household Income Impact (Millions $)**
**Spring (April, May, and June)**



# 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.

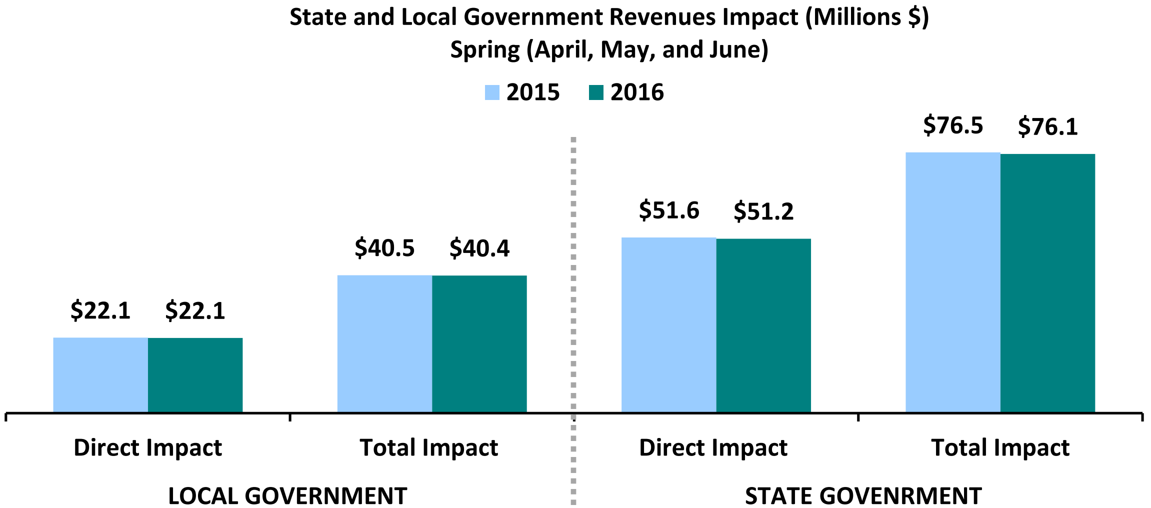
The gross government revenues accruing to governments as A result of producing the output purchased with visitor expenditures is the government revenue impact.

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**

**Spring 2016**

## April 2016 Interviewing Statistics

| City | Event/Location | Interviewing Dates | Number of Interviews |
|---|---|---|---|
| Bonita Springs | Bonita Beach Park | 4/1/2016 | 29 |
| Fort Myers | RSW Airport | 4/2/2016 | 36 |
| Fort Myers | Edison & Ford Winter Estates | 4/6/2016 | 30 |
| Fort Myers Beach | Cane Palm Beach Condos | 4/8/2016 | 6 |
| Fort Myers Beach | Best Western PLUS Beach Resort | 4/8/2016 | 7 |
| Fort Myers Beach | Sunset Celebration | 4/8/2016 | 22 |
| Sanibel | Holiday Inn Sanibel Island | 4/12/2016 | 11 |
| Sanibel | Sanibel Surfside | 4/12/2016 | 7 |
| Sanibel | Pointe Santo | 4/12/2016 | 7 |
| Sanibel | Casa Ybel | 4/12/2016 | 6 |
| Fort Myers | Centennial Park | 4/17/2016 | 5 |
| Fort Myers Beach | DiamondHead Beach Resort | 4/19/2016 | 11 |
| Fort Myers Beach | Windward Passage | 4/19/2016 | 8 |
| Fort Myers Beach | Estero Island Beach Club | 4/19/2016 | 10 |
| Fort Myers | Edison & Ford Winter Estates | 4/21/2016 | 28 |
| Estero | Miromar Outlet | 4/22/2016 | 20 |
| Fort Myers | RSW Airport | 4/23/2016 | 32 |
| Sanibel | Compass Pointe | 4/27/2016 | 5 |
| Sanibel | Loggerhead Cay | 4/27/2016 | 6 |
| Sanibel | Coquina Beach Club | 4/27/2016 | 6 |
| Sanibel | Lighthouse Beach | 4/27/2016 | 12 |
| Sanibel | Sanibel Inn | 4/27/2016 | 11 |
| | | | |
| **Total** | | | **315** |

# May 2016 Interviewing Statistics

| City | Event/Location | Interviewing Dates | Number of Interviews |
|---|---|---|---|
| Fort Myers Beach | Sunset Celebration | 5/6/2016 | 15 |
| Fort Myers Beach | Cane Palm Beach Condos | 5/6/2016 | 5 |
| Fort Myers Beach | Best Western PLUS Beach Resort | 5/6/2016 | 10 |
| Fort Myers | RSW Airport | 5/7/2016 | 30 |
| Fort Myers | Centennial Park | 5/8/2016 | 7 |
| Sanibel | Holiday Inn Sanibel Island | 5/11/2016 | 8 |
| Sanibel | Compass Pointe | 5/11/2016 | 7 |
| Sanibel | Sanibel Surfside | 5/11/2016 | 7 |
| Sanibel | Tarpon Beach | 5/11/2016 | 7 |
| Fort Myers | Edison & Ford Winter Estates | 5/12/2016 | 29 |
| Fort Myers | RSW Airport | 5/14/2016 | 16 |
| Fort Myers | RSW Airport | 5/21/2016 | 18 |
| Fort Myers Beach | Edison & Ford Winter Estates | 5/24/2016 | 8 |
| Fort Myers Beach | Winward Passage | 5/24/2016 | 6 |
| Fort Myers Beach | DiamondHead Beach Resort | 5/24/2016 | 11 |
| Fort Myers Beach | The Pier | 5/24/2016 | 15 |
| Sanibel | Sanibel Arms | 5/26/2016 | 6 |
| Sanibel | Sanibel Beach Club | 5/26/2016 | 7 |
| Sanibel | Loggerhead Cay | 5/26/2016 | 6 |
| Sanibel | Coquina Beach Club | 5/26/2016 | 8 |
| Sanibel | Sanibel Inn | 5/26/2016 | 12 |
| Estero | Miromar Outlet | 5/27/2016 | 20 |
| Fort Myers | Edison & Ford Winter Estates | 5/28/2016 | 28 |
| Bonita Springs | Bonita Beach Park | 5/31/2016 | 25 |
| | | | |
| **Total** | | | **311** |

# June 2016 Interviewing Statistics

| City | Event/Location | Interviewing Dates | Number of Interviews |
|---|---|---|---|
| Fort Myers Beach | The Pier | 6/1/2016 | 11 |
| Fort Myers Beach | DiamondHead Beach Resort | 6/1/2016 | 9 |
| Fort Myers Beach | Neptune Inn | 6/1/2016 | 8 |
| Fort Myers Beach | Estero Island Beach Club | 6/1/2016 | 10 |
| Fort Myers | Edison & Ford Winter Estates | 6/3/2016 | 29 |
| Fort Myers | RSW Airport | 6/4/2016 | 33 |
| Sanibel | Loggerhead Cay | 6/15/2016 | 9 |
| Sanibel | Coquina Beach Club | 6/15/2016 | 8 |
| Sanibel | Sanibel Surfside | 6/15/2016 | 7 |
| Sanibel | Holiday Inn Sanibel Island | 6/15/2016 | 9 |
| Fort Myers | Edison & Ford Winter Estates | 6/17/2016 | 28 |
| Fort Myers | Centennial Park | 6/19/2016 | 7 |
| Sanibel | Sanibel Inn | 6/21/2016 | 12 |
| Sanibel | Compass Pointe | 6/21/2016 | 4 |
| Sanibel | Tortuga Beach Resort | 6/21/2016 | 6 |
| Sanibel | Lighthouse Beach | 6/21/2016 | 9 |
| Bonita Springs | Bonita Beach Park | 6/23/2016 | 28 |
| Estero | Miromar Outlet | 6/24/2016 | 19 |
| Fort Myers | RSW Airport | 6/25/2016 | 32 |
| Fort Myers Beach | Best Western PLUS Beach Resort | 6/27/2016 | 12 |
| Fort Myers Beach | Times Square | 6/27/2016 | 12 |
| Fort Myers Beach | Bel Air | 6/27/2016 | 7 |
| | | | |
| **Total** | | | **309** |

## Occupancy Interviewing Statistics

Interviews were conducted during the first two weeks of July 2016 to gather data for April, May, and June 2016 lodging activity. Information was provided by 135 Lee County lodging properties.

| Lodging Type | Spring 2016 Number of Interviews |
|---|---|
| | |
| Hotel/Motel/Resort/B&Bs | 86 |
| Condo/Cottage/Vacation Home/Timeshare | 31 |
| RV Park/Campground | 18 |
| **Total** | **135** |