THE BEACHES OF FORT MYERS AND SANIBEL

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

# 2015 Annual Visitor Profile and Occupancy Analysis
# (January-December)

**March 7, 2016**

**Prepared for:**

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

**Prepared by:**

**Davidson-Peterson Associates**

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providing direction
in travel & tourism

# Executive Summary
# 2015

*Throughout this report, statistically significant differences between responses for 2014 and 2015 at the 95% confidence level are noted with an A,B lettering system.*

*For example:*

| 2014<br>A | 2015<br>B |
|---|---|
| 60% | 70%A |

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

# Executive Summary

Introduction

The following report summarizes the results from the Lee County Visitor Profile and Occupancy research study for Calendar Year 2015, with comparisons to Calendar Year 2014. The research is conducted throughout the year and includes surveys of:

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

Where referenced the seasons are defined as follows:

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

# Executive Summary

Visitation Estimates

- During calendar year 2015, Lee County hosted an estimated  4.9 million visitors.  Over half of these visitors stayed in paid accommodations on their trip, while the remainder stayed with friends or relatives.
- While 2015 visitation among paid accommodation was comparable to 2014, Lee County saw a modest decrease in visitors staying with friends or relatives (-4.6%).  As a result, total visitation in 2015 was slightly lower than the prior year (-1.7%).

| Estimated Visitation | 2014 | 2015 | % Change |
|---|---|---|---|
| Paid Accommodations | 3,015,974 | 3,023,021 | 0.2% |
| Friends/Relatives | 1,987,596 | 1,895,742 | -4.6% |
| **Total Visitation** | **5,003,570** | **4,918,763** | **-1.7%** |

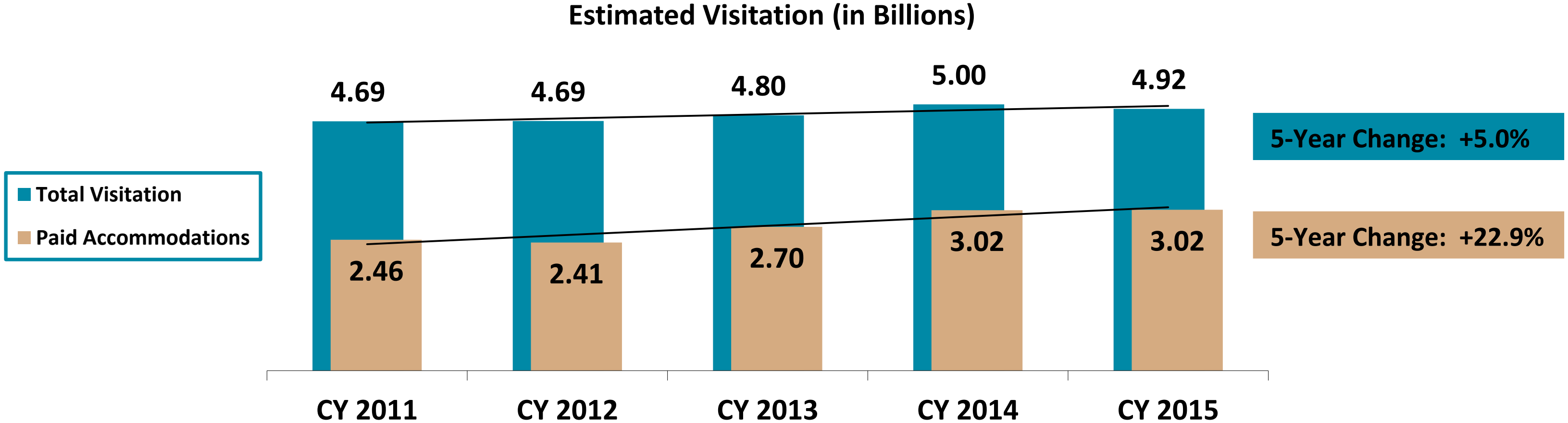
Visitor Expenditures

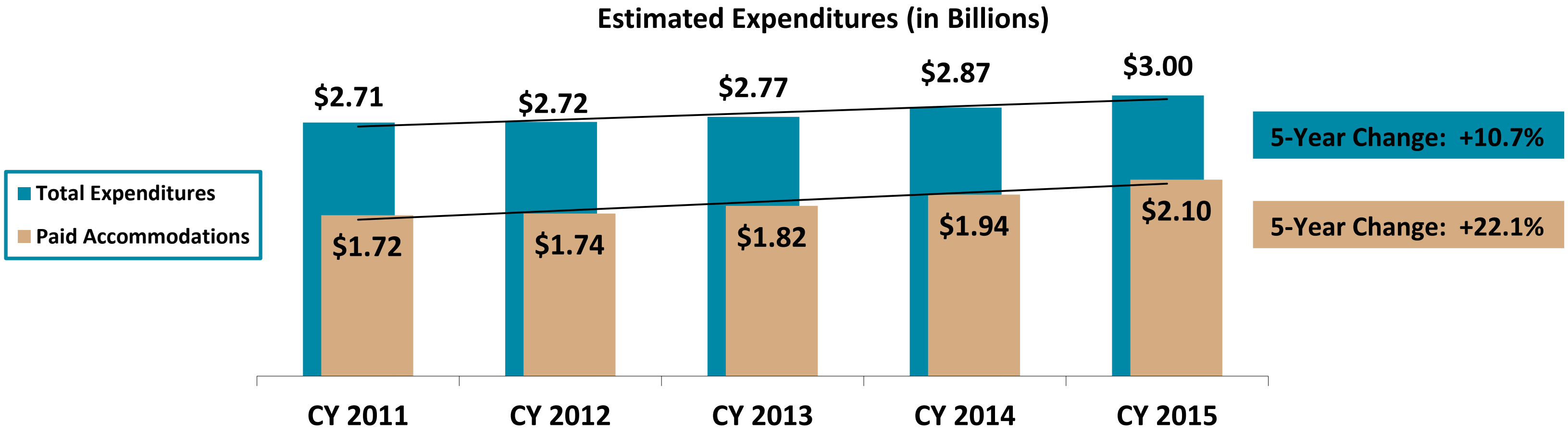
- Visitors spent an estimated $3.0 billion in Lee County during 2015, a 4.6% increase over 2014 estimated visitor spending ($2.9 billion) and the highest seen over the course of the past five years (2011 through 2015).
- Visitors staying in paid accommodations contributed 2.1 billion (70% of the total), representing an 8.3% increase over 2014.  However, the VFR traveler segment showed a modest decline (-3.1%).

| Estimated Expenditures | 2014 | 2015 | % Change |
|---|---|---|---|
| Paid Accommodations | $1,938,003,424 | $2,098,652,554 | 8.3% |
| Friends/Relatives | $927,094,353 | $898,463,224 | -3.1% |
| **Total Expenditures** | **$2,865,097,777** | **$2,997,115,778** | **4.6%** |

5-Year Trends in Visitation and Expenditures

- Estimated visitation and visitor expenditures were significantly higher in 2015 than they were five years ago, particularly among the paid accommodation guest visitor segment.

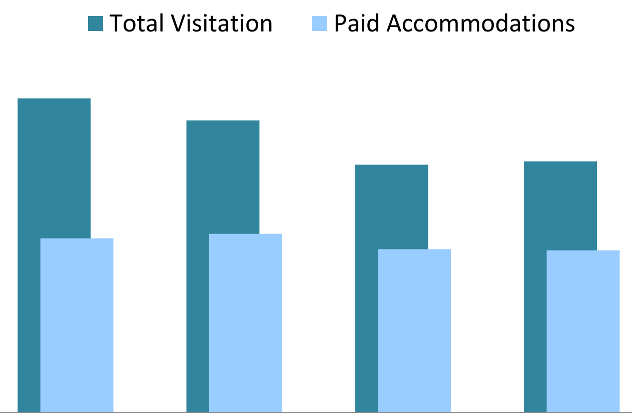


## Visitation and Expenditure Estimates by Season

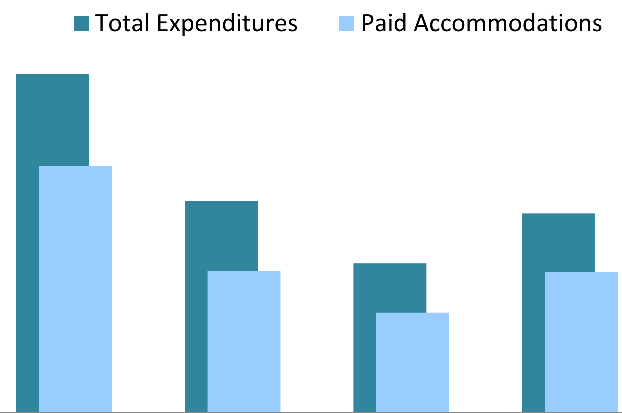
- As is typical, winter season drove the highest levels of visitation and visitor spending versus other seasons during 2015. Winter season contributed 28% of the visitors for the year but their spending amounted to 38% of the total. Therefore, the decline in visitation from winter to spring is not nearly as dramatic as the decline in spending.

### Estimated Visitation



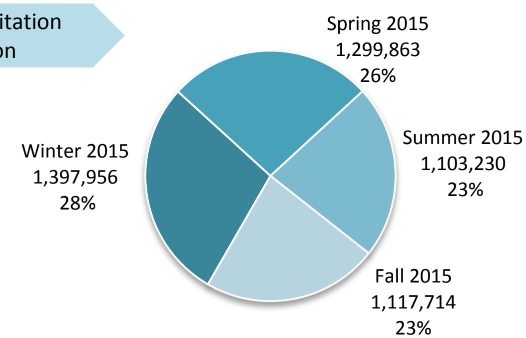

| | Winter 2015 | Spring 2015 | Summer 2015 | Fall 2015 |
|---|---|---|---|---|
| Total Visitation | 1,397,956 | 1,299,863 | 1,103,230 | 1,117,714 |
| Paid Accommodations | 776,164 | 795,752 | 728,080 | 723,025 |

### Estimated Expenditures

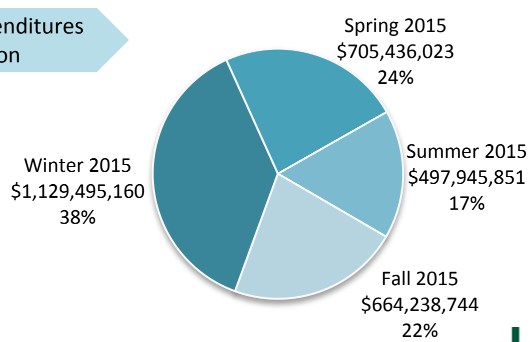



| | Winter 2015 | Spring 2015 | Summer 2015 | Fall 2015 |
|---|---|---|---|---|
| Total Expenditures | $1,129,495,160 | $705,436,023 | $497,945,851 | $664,238,744 |
| Paid Accommodations | $822,847,372 | $472,583,652 | $333,721,725 | $469,499,805 |

% of Total Visitation by Season




% of Total Expenditures by Season



## Visitor Origins

- The majority of 2015 visitors staying in paid accommodations were United States residents (74%), representing 2.2 million visitors. International markets delivered 782,333 visitors to Lee County's lodging establishments – with Germany, Canada, and the UK contributing the largest shares.

- Half of domestic paid accommodations guests came from the Midwest (50%). The Northeast (24%) and South (23%) contributed about one-quarter each. Very few came from the West (4%).

- Minneapolis was the leading domestic feeder market for the Lee County lodging industry during 2015, followed by Boston, New York, Chicago, and Indianapolis to make up the top five. The key Florida market in the top 12 was Miami.

**2015 Top DMAs (Paid Accommodations)**

| | | | |
|---|---|---|---|
| Minneapolis-Saint Paul | 5.9% | 132,404 | 1 |
| Boston (Manchester, NH) | 5.8% | 129,009 | 2 |
| New York | 5.7% | 127,312 | 3 |
| Chicago | 4.9% | 110,337 | 4 |
| Indianapolis | 4.6% | 103,547 | 5 |
| Cleveland-Akron (Canton) | 3.6% | 79,782 | 6 |
| Detroit | 3.5% | 78,085 | 7 |
| Columbus, OH | 3.4% | 76,387 | 8 |
| Philadelphia | 2.7% | 59,412 | 9 |
| Cincinnati | 2.6% | 57,715 | 10 |
| Miami-Fort Lauderdale | 2.2% | 49,227 | 11 |
| Milwaukee | 2.0% | 44,135 | 12 |

**Visitors Staying in Paid Accommodations**

| | % | | Visitor Estimates | | % Change |
|---|---|---|---|---|---|
| **Country of Origin** | **2014** | **2015** | **2014** | **2015** | |
| United States | 76% | 74% | 2,279,842 | 2,240,688 | -1.7% |
| Germany | 8% | 9% | 250,055 | 272,590 | 9.0% |
| Canada | 6% | 6% | 176,059 | 196,265 | 11.5% |
| UK | 5% | 6% | 139,061 | 177,183 | 27.4% |
| Other International | 6% | 5% | 170,956 | 136,295 | -20.3% |

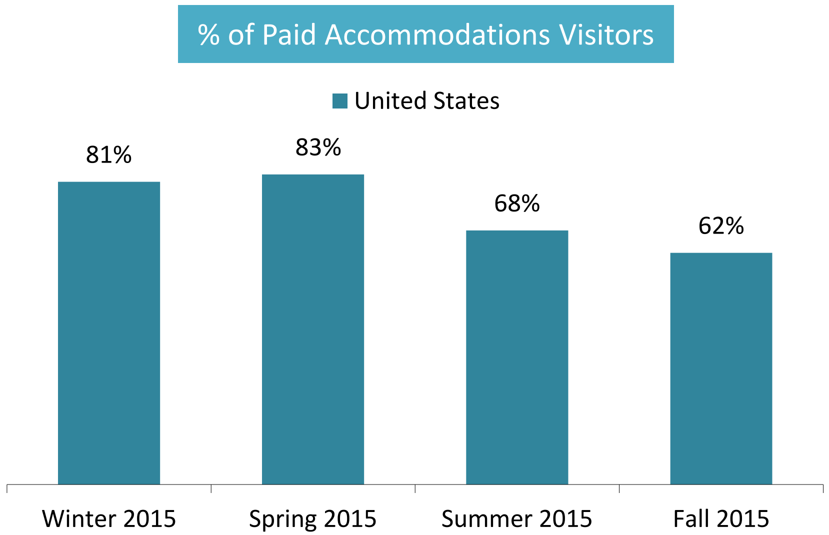
**Visitors Staying in Paid Accommodations**

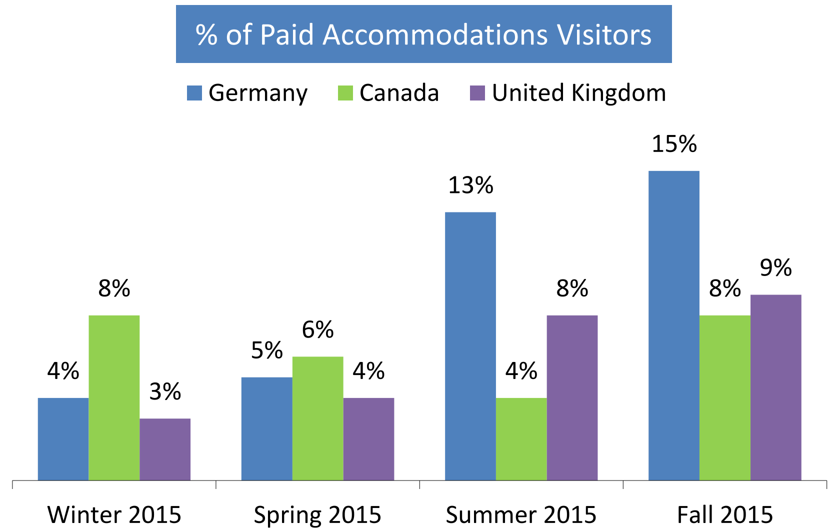
| | % | | Visitor Estimates | | % Change |
|---|---|---|---|---|---|
| **U.S. Region of Origin** | **2014** | **2015** | **2014** | **2015** | |
| Florida | 7% | 8% | 160,947 | 176,539 | 9.7% |
| South (including Florida) | 22% | 23% | 503,514 | 510,945 | 1.5% |
| Midwest | 50% | 50% | 1,145,827 | 1,110,159 | -3.1% |
| Northeast | 24% | 24% | 556,671 | 533,012 | -4.3% |
| West | 3% | 4% | 73,829 | 86,572 | 17.3% |

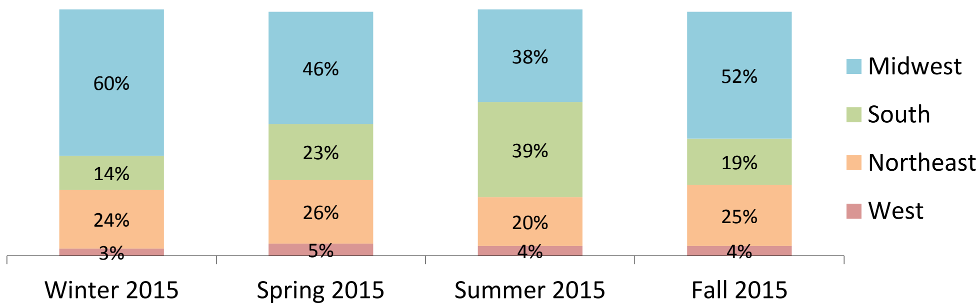
*Note: The percentage of visitors by origin market is based on data collected from visitors in the Visitor Profile Survey.*

## Visitor Origins by Season

- The distribution of where Lee County's visitors came from varied depending on the time of year. While the U.S. markets dominated as the majority each season, the proportion of U.S. residents staying in Lee County paid accommodations was higher in the winter and spring seasons than in summer and fall.
- On the international front, Canadians contributed a larger share in the winter and fall seasons than in other seasons. In contrast, the incidence of German visitors was lower in the first half of the year and peaked in the second half. The same pattern was true for UK visitors.



## Trip Planning

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

  - 71% started talking about trip 3+ months in advance (vs. 73% in 2014)
  - 65% chose Lee County for trip 3+ months in advance (vs. 66% in 2014)
  - 57% made lodging reservation 3+ months in advance (vs. 57% in 2014)

  While only a minority of visitors made the decision to visit Lee County less than three months before their trip, the prevalence of doing so was greater among first-timers (32%) than repeaters (21%), as well as visitors staying in paid accommodations (34%) versus those staying in unpaid accommodations (10%).  Also, Floridans were more likely  than out-of-state visitors  to engage in short-range decision making (44% vs. 26%)

- As seen in previous years, the internet continues to be an instrumental planning tool for 2015 visitors (87%). Four in ten mentioned using airline websites – the highest level of mentions (40%). Somewhat fewer 2015 visitors used search engines (29%), Trip Advisor (25%), booking websites (24%), and/or hotel websites (23%) to aid in planning their trip.

- Many 2015 visitors said they access online destination planning information using multiple devices – with laptop computer and smartphone being most prevalent (57% and 51% respectively).  Worth noting, the incidence of using a smartphone was higher this year than last among  domestic (53% vs. 49% in 2014) and  repeat visitors (51% vs. 48% in 2014).

- The attributes 2015 visitors rated highest for having positively influenced their selection of Lee County as a destination were:

  - *Warm weather* (85%)
  - *Peaceful/relaxing* (85%)
  - *White sandy beaches (79%)*
  - *A safe destination* (72%)
  - *Clean, unspoiled environment* (71%)
  - *Convenient location* (68%)

## Trip Profile

- Flying continues to be the primary means of transportation to Lee County among 2015 visitors with more than two-thirds flying to the area (71%) – about the same as in 2014 (73%). Eight in ten air travelers deplaned at Southwest Florida International Airport (82%).

- Two-thirds of visitors in 2015 had been to Lee County before (67%). However, Lee County drew a slightly larger share of first-timers this year than last (31% vs. 28% in 2014), driven by an increase in those from international markets. Similar to last year, eight in ten visitors said the purpose of their trip was to vacation (84%), while a third indicate they were visiting friends or relatives (34%). Visitors reported their Lee County trip would last about 8 or 9 days on average.

- Six in ten visitors surveyed said they were staying overnight in paid accommodations during their 2015 Lee County trip. More than half of paid accommodations guests indicated they were staying in a hotel/motel/resort (55%), somewhat fewer in a condo/vacation home property (42%), and only a small minority at a RV park/campground (3%). The majority felt the quality of their lodging *met expectations* (57%), and some said the quality *far exceeded* or *exceeded expectations* (37%). Only 22% of first-timers from international markets reported that the quality of accommodations exceeded their expectations.

- Almost all visitors claimed to be enjoying Lee County's *beaches* (91%) during their trip. Further, when asked which attractions they were visiting, beaches received the highest level of mentions at 82%. Many visitors also enjoyed r*elaxing* (76%), *dining out* (71%), *swimming* (59%) and *shopping* (53%) while in Lee County. Half of 2015 visitors took a day trip outside the County (50%), and those that did were most likely to visit Naples. International visitors were more likely to take a day trip (64%) than were domestic visitors (46%).

- Visitor satisfaction remains exceptionally high in Lee County – almost all 2015 visitors said they were either *very satisfied* or *satisfied* with their visit (54% and 38% respectively), and nearly as many indicated they would recommend Lee County to a friend over other areas in Florida (85%). Additionally, most visitors said they are likely to return to Lee County themselves (88%), and six in ten of those that did claimed they will return next year (59%). Intent to return was strong even among first-timers, with three quarters stating they are likely to return (78%), although only one-third said they would do so next year (35%).

- Negative reactions to specific aspects visitors may have disliked about the area during their visit emerged at low levels. The most pervasive complaint mentioned by 2015 visitors was *traffic (34%)* – a slight increase from last year (28%). Far fewer mentioned *insects* (14%), *high prices* (11%), and *beach seaweed* (8%) as unfavorable features.

Visitor and Travel Party Characteristics

- The composition of 2015 visitors and their travel parties can be summarized as follows:

  - 52 years of age on average (age of respondent)
  - $99,900 household income on average
  - 74% married
  - 44% traveling as a couple
  - 31% traveling as a family
  - 21% traveling *with* children
  - 3 people in travel party on average

First-time visitors tended to be a bit younger (47 years of age) with lower incomes ($88,500 average). Also, they were more likely to be traveling as a couple than were repeat visitors (53% vs. 40% repeat visitors).

Lodging Industry Assessments

- For the Lee County lodging industry in total, there was an increase of 214,743 in *occupied* room nights (+4.6%), from 2014 to 2015, despite a decrease of 131,037 *available* room nights (-1.8%).

| | Occupied Room Nights | | | Available Room Nights | | |
|---|---|---|---|---|---|---|
| | 2014 | 2015 | % Change | 2014 | 2015 | % Change |
| Hotel/Motel/Resort/B&B | 2,700,101 | 2,911,197 | 7.8% | 4,029,441 | 4,058,707 | 0.7% |
| Condo/Cottage/Vacation Home | 1,036,368 | 1,034,440 | -0.2% | 1,565,101 | 1,541,636 | -1.5% |
| RV Park/Campground | 942,875 | 948,450 | 0.6% | 1,829,295 | 1,692,457 | -7.5 |
| **Total** | **4,679,344** | **4,894,087** | **4.6%** | **7,423,837** | **7,292,800** | **-1.8%** |

- As a result, the industry-wide average occupancy rate in Lee County increased from 63.0% in 2014 to 67.1% in 2015 (+6.5%). Average occupancy rate for the hotel/motel/resort and RV parks/campgrounds categories showed noteworthy increases (+7.0% and +8.7% respectively), while the increase for condo/vacation home was more modest (+1.3%).
- Lee County's average daily rate increased 5.6% year-over-year from $136.98 to $144.68. All property categories saw growth in ADR versus the prior year.
- Due to the positive shifts in average occupancy rate and ADR, revenue per available room was markedly higher in 2015 than in 2014 (+12.5%). All three property categories experienced significant growth in RevPAR year-over-year.

| | Average Occupancy Rate | | | Average Daily Rate | | | RevPAR | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2014 | 2015 | % Change | 2014 | 2015 | % Change | 2014 | 2015 | % Change |
| Hotel/Motel/Resort/B&B | 67.0% | 71.7% | 7.0% | $148.75 | $154.15 | 3.6% | $99.68 | $110.57 | 10.9% |
| Condo/Cottage/Vacation Home | 66.2% | 67.1% | 1.3% | $184.71 | $200.76 | 8.7% | $122.31 | $134.71 | 10.1% |
| RV Park/Campground | 51.5% | 56.0% | 8.7% | $50.78 | $54.48 | 7.3% | $26.17 | $30.53 | 16.7% |
| **AVERAGE** | **63.0%** | **67.1%** | **6.5%** | **$136.98** | **$144.68** | **5.6%** | **$86.34** | **$97.10** | **12.5%** |

# 2015 Lee County Snapshot

| Total Visitation | % | | Visitor Estimates | |
|---|---|---|---|---|
| | 2014 | 2015 | 2014 | 2015 |
| Paid Accommodations | 60% | 61% | 3,015,974 | 3,023,021 |
| Friends/Relatives | 40% | 39% | 1,987,596 | 1,895,742 |
| **Total Visitation** | | | **5,003,570** | **4,918,763** |

| Total Visitor Expenditures | 2014 | 2015 | % Change |
|---|---|---|---|
| Total Visitor Expenditures | $2,865,097,777 | $2,997,115,778 | 4.6% |
| Paid Accommodations | $1,938,003,424 | $2,098,652,554 | 8.3% |

| Visitor Origin - Visitors Staying in Paid Accommodations | % | | Visitor Estimates | |
|---|---|---|---|---|
| | 2014 | 2015 | 2014 | 2015 |
| Florida | 7% | 8% | 160,947 | 176,539 |
| | | | | |
| US | 76% | 74% | 2,279,842 | 2,240,688 |
| Germany | 8% | 9% | 250,055 | 272,590 |
| Canada | 6% | 6% | 176,059 | 196,265 |
| UK | 5% | 6% | 139,061 | 177,183 |
| Other International | 6% | 5% | 170,956 | 136,295 |

| First-Time/Repeat Visitors to Lee County | 2014 | 2015 |
|---|---|---|
| First-time | 28% | 31% |
| Repeat | 71% | 67% |

| | Average Occupancy Rate | | | Average Daily Rate | | | RevPAR | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2014 | 2015 | % Change | 2014 | 2015 | % Change | 2014 | 2015 | % Change |
| Hotel/Motel/Resort/B&B | 67.0% | 71.7% | 7.0% | $148.75 | $154.15 | 3.6% | $99.68 | $110.57 | 10.9% |
| Condo/Cottage/Vacation Home | 66.2% | 67.1% | 1.3% | $184.71 | $200.76 | 8.7% | $122.31 | $134.71 | 10.1% |
| RV Park/Campground | 51.5% | 56.0% | 8.7% | $50.78 | $54.48 | 7.3% | $26.17 | $30.53 | 16.7% |
| **AVERAGE** | **63.0%** | **67.1%** | **6.5%** | **$136.98** | **$144.68** | **5.6%** | **$86.34** | **$97.10** | **12.5%** |

## Visitor Profile Analysis
## 2015

*A total of 3,743 interviews were conducted with visitors in Lee County during the months of January – December 2015. A total sample of this size is considered accurate to plus or minus 1.6 percentage points at the 95% confidence level.*

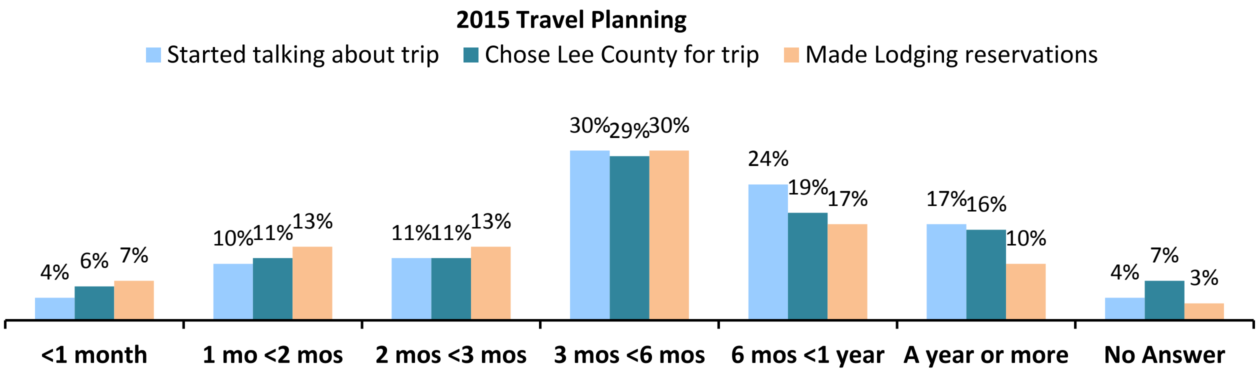
*A total of 3,701 interviews were conducted with visitors in Lee County during the months of January – December 2014. A total sample of this size is considered accurate to plus or minus 1.6 percentage points at the 95% confidence level.*

THE BEACHES OF FORT MYERS AND SANIBEL

# Travel Planning

| | Started Talking About Trip | | Chose Lee County for Trip | | Made Lodging Reservations* | |
|---|---|---|---|---|---|---|
| | 2014 | 2015 | 2014 | 2015 | 2014 | 2015 |
| | A | B | A | B | A | B |
| **Total Respondents** | **3701** | **3743** | **3701** | **3743** | **2374*** | **2247*** |
| Less than 3 months (NET) | 24% | 25% | 28% | 28% | 34% | 34% |
| <1 month | 4% | 4% | 5% | 6%a | 8% | 7% |
| 1 month - <2 months | 9% | 10% | 11% | 11% | 14% | 13% |
| 2 months - <3 months | 11% | 11% | 12% | 11% | 13% | 13% |
| 3 months or more (NET) | 73% | 71% | 66% | 65% | 57% | 57% |
| 3 months - <6 months | 32% | 30% | 30% | 29% | 30% | 30% |
| 6 months - <1 year | 25% | 24% | 21% | 19% | 18% | 17% |
| A year or more | 16% | 17% | 15% | 16% | 9% | 10% |
| No Lodging Reservations Made | N/A | N/A | N/A | N/A | 5% | 6% |
| No Answer | 3% | 4% | 6% | 7% | 3% | 3% |

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




* Base: Among those staying in paid accommodations



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# Travel Planning

| Devices Used to Access Destination Planning Information | 2014 | 2015 |
|---|---|---|
| | A | B |
| **Total Respondents** | **3701** | **3743** |
| Any (NET) | 96% | 96% |
| Laptop computer | 61%b | 57% |
| Smartphone (iPhone, Blackberry, etc.) | 48% | 51%a |
| Tablet (iPad, etc.) | 43% | 45% |
| Desktop computer | 43% | 42% |
| E-Reader (Nook, Kindle, etc.) | 4%b | 3% |
| Other portable device | 1% | 1% |
| None of these | 4% | 4% |
| No Answer | <1% | <1% |

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

| Travel Websites Visited | 2014 | 2015 |
|---|---|---|
| | A | B |
| **Total Respondents who use devices for destination planning** | **3556** | **3598** |
| Visited web sites (net) | 88% | 87% |
| Airline websites | 43% | 40% |
| Search Engines | 28% | 29% |
| Trip Advisor | 25% | 25% |
| Booking websites | 24% | 24% |
| Hotel websites | 26%b | 23% |
| Vacation rental websites | 24% | 22% |
| Visit Florida | 9% | 13%a |
| www.FortMyers-Sanibel.com | 12% | 11% |
| AAA | 7% | 7% |
| Facebook | 6% | 7%a |
| Other | 9% | 9% |
| None/Didn't visit websites | 11% | 12% |
| No Answer | 1% | 1% |

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

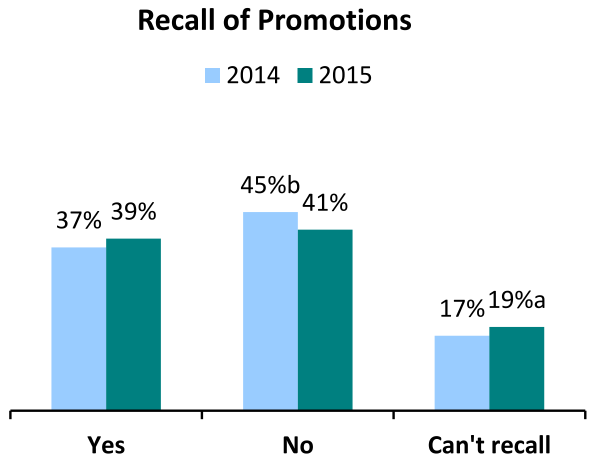
# Travel Planning

| Travel Information Requested | 2014 | 2015 |
|---|---|---|
| | A | B |
| **Total Respondents** | **3701** | **3743** |
| Requested information (NET) | 28%b | 25% |
| Hotel Web Site | 12%b | 9% |
| VCB website | 6% | 6% |
| Call hotel | 6%b | 6% |
| Visitor Guide | 4% | 4% |
| E-Newsletter | 1% | 1% |
| Call local Chamber of Commerce | <1% | <1% |
| Other | 9% | 10% |
| None/Did not request information | 67% | 69%a |
| No Answer | 5% | 5% |

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

| Recall of Lee County Promotions | 2014 | 201 |
|---|---|---|
| | A | B |
| **Total Respondents** | **3701** | **3743** |
| Yes | 37% | 39% |
| No | 45%b | 41% |
| Can't Recall | 17% | 19%a |

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

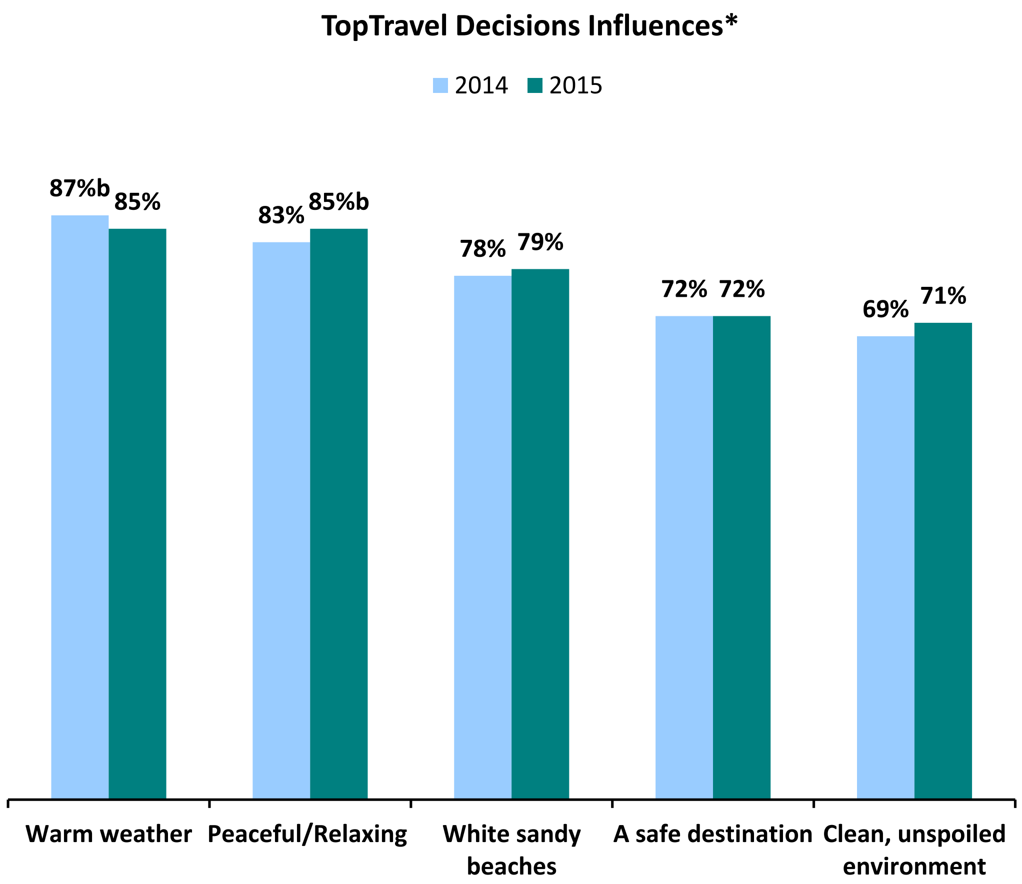


# Travel Planning

| Travel Decision Influences* | | |
|---|---|---|
| | 2014 | 2015 |
| | A | B |
| **Total Respondents** | **3701** | **3743** |
| Warm weather | 87%b | 85% |
| Peaceful/Relaxing | 83% | 85%a |
| White sandy beaches | 78% | 79% |
| A safe destination | 72% | 72% |
| Clean, unspoiled environment | 69% | 71% |
| Convenient location | 66% | 68%a |
| Plenty to see and do | 59% | 63%a |
| Good value for the money | 62% | 63% |
| Reasonably priced lodging | 55% | 55% |
| Affordable dining | 53% | 55% |
| A "family" atmosphere | 54%b | 51% |
| Upscale accommodations | 51%b | 48% |

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

| | 2014 | 2015 |
|---|---|---|
| | A | B |
| **Total Respondents** | **3701** | **3743** |
| Fly | 73% | 71% |
| Drive a personal vehicle | 21% | 23%a |
| Drive a rental vehicle | 5% | 4% |
| Drive an RV | 1% | 2%a |
| Other/No Answer (NET) | <1% | <1% |

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

## Frequency of Using SWFL Int'l (Past Year)

| | 2014 | 2015 |
|---|---|---|
| | A | B |
| **Total Respondents** | **3701** | **3743** |
| <u>One or more trips</u> | <u>60%</u> | <u>59%</u> |
| 1 trip | 39% | 39% |
| 2 to 3 trips | 16% | 15% |
| 4 to 5 trips | 3% | 3% |
| 6 or more trips | 2% | 2% |
| <u>None/No Answer</u> | <u>40%</u> | <u>41%</u> |

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

## Airport Used

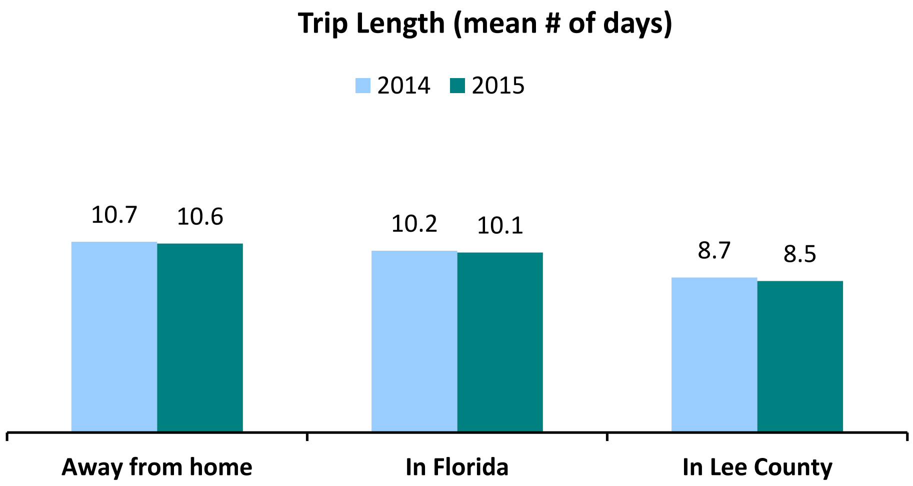
| | 2014 | 2015 |
|---|---|---|
| | A | B |
| **Total Respondents Who Arrived by Air** | **2699** | **2658** |
| SW Florida Int'l (Fort Myers) | 85%b | 82% |
| Punta Gorda | 3% | 5%a |
| Miami Int'l | 3% | 4%a |
| Tampa Int'l | 2% | 4%a |
| Orlando Int'l | 3% | 3% |
| Ft. Lauderdale Int'l | 2% | 2% |
| Other/No Answer (NET) | 1% | 2% |

Q2: At which Florida airport did you land?

# Trip Profile

| Trip Length<br>Mean # of Days (excluding outliers) | | |
|---|---|---|
| | 2014 | 2015 |
| | A | B |
| **Total Respondents** | **3701** | **3743** |
| Away from home | 10.7 | 10.6 |
| In Florida | 10.2 | 10.1 |
| In Lee County | 8.7 | 8.5 |

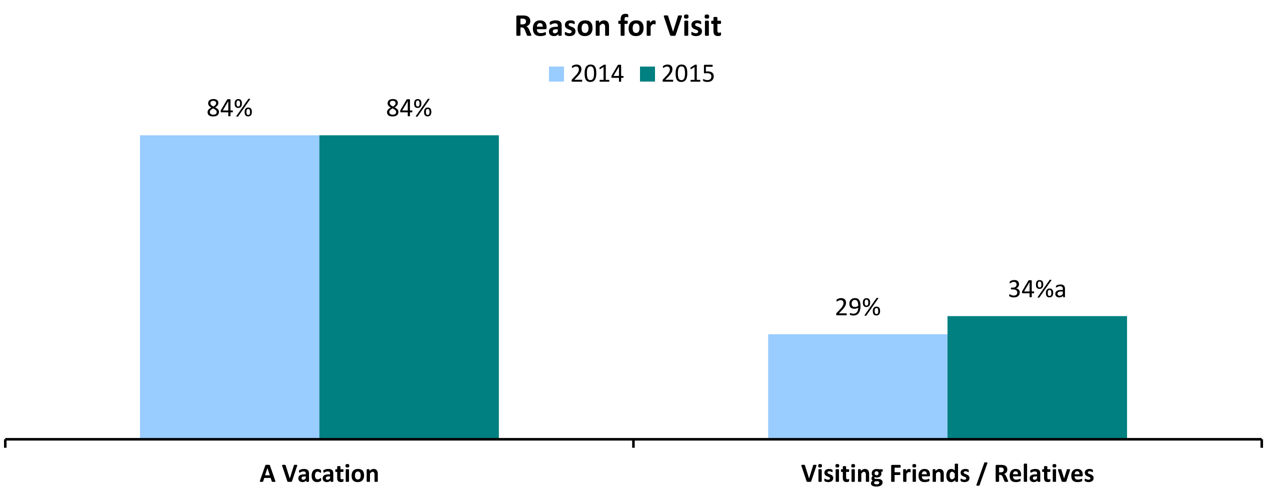
Q4a/b/c: On this trip, how many days will you be:



# Trip Profile

| Reason(s) for Visit | | |
|---|---|---|
| | 2014 | 2015 |
| | A | B |
| **Total Respondents** | 3701 | 3743 |
| A Vacation | 84% | 84% |
| Visiting Friends/Relatives | 29% | 34%a |
| Sporting Event(s) | 2% | 2% |
| Personal Business | 2% | 2% |
| Other Business Trip | 1%b | 1% |
| A Conference/Meeting | 1% | 1% |
| A Convention/Trade Show | <1% | <1% |
| Other/No Answer (NET) | 2% | 2%a |

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



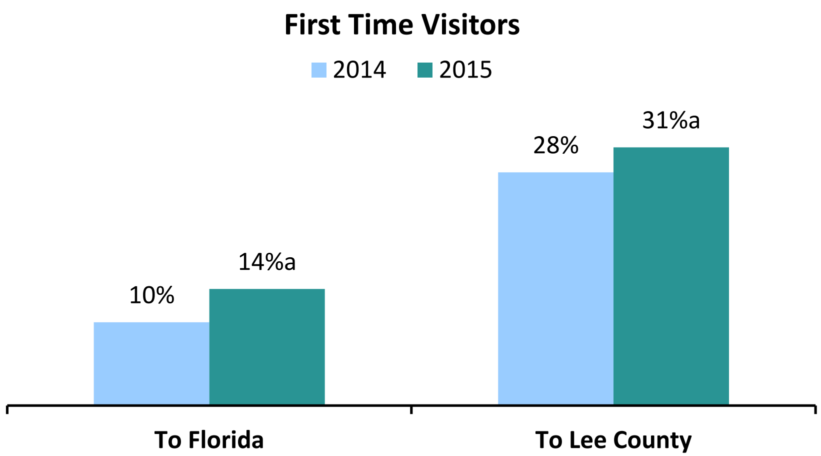
# Trip Profile

| First Time Visitors to Lee County | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | Total | | Florida Residents | | Out-of-State Residents | | International Visitors | |
| | 2014 | 2015 | 2014 | 2015 | 2014 | 2015 | 2014 | 2015 |
| | A | B | A | B | A | B | A | B |
| **Total Respondents** | **3701** | **3743** | **150** | **150** | **2244** | **2056** | **857** | **907** |
| First-time visitor | 28% | 31%a | 15% | 14% | 24% | 24% | 43% | 52%a |
| Repeat visitor | 71%b | 67% | 83% | 84% | 75% | 74% | 56%b | 47% |
| No Answer | 1% | 2% | 2% | 1% | 1% | 2% | 1% | 2% |

Q15: Is this your first visit to Lee County?

| First Time Visitors to Florida | | |
|---|---|---|
| | 2014 | 2015 |
| **Total Respondents** | **3701** | **3743** |
| | A | B |
| Yes, first-time visitor | 10% | 14%a |
| No | 85%b | 80% |
| No answer | 1% | 1% |
| *FL Residents** | 4% | 4% |

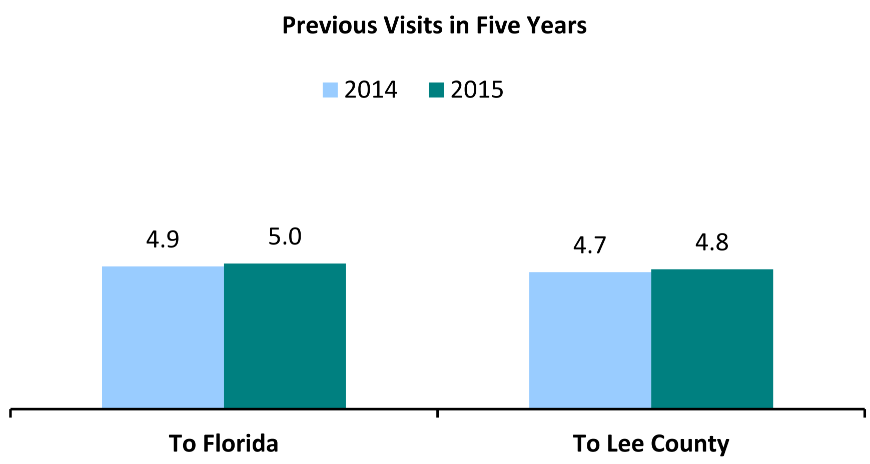
Q13: Is this your first visit to Florida?
**Florida residents are shown as a proportion of total visitor interviews conducted, though FL residents are not asked this question .*



# Trip Profile

| Previous Visits in Five Years | | | | |
|---|---|---|---|---|
| | Mean # of Visits to Florida | | Mean # of Visits to Lee County | |
| | 2014 | 2015 | 2014 | 2015 |
| | A | B | A | B |
| **Base: Repeat Visitors** | **3149 (FL res. Excl)** | **2992 (FL res. Excl)** | **2626** | **2503** |
| Number of visits | 4.9 | 5.0 | 4.7 | 4.8 |

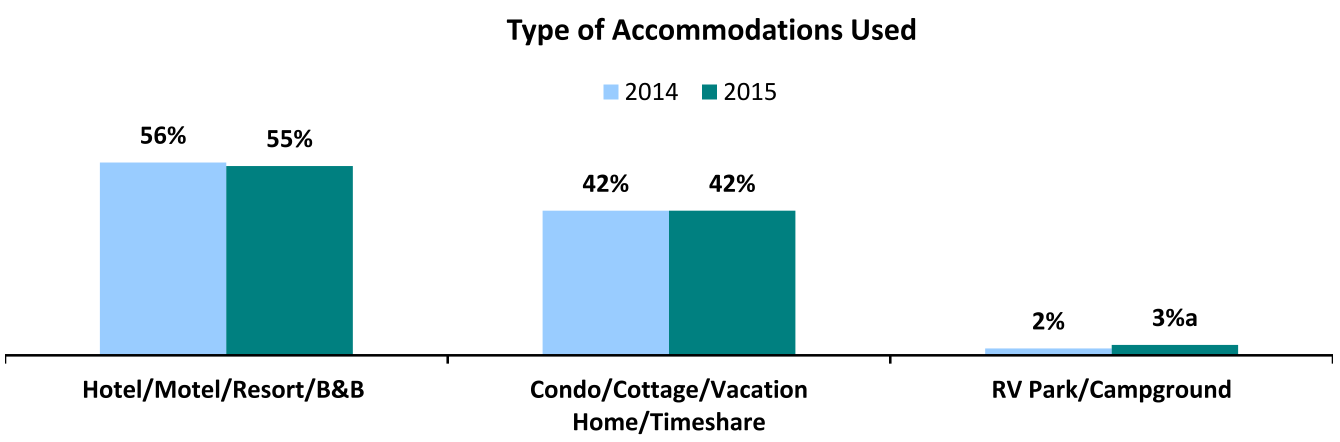
Q14: Over the past five (5) years, how many times have you visited Florida?
Q16: Over the past five (5) years, how many times have you visited Lee County?



## Trip Profile

| Type of Accommodations Used | 2014 | 2015 |
|---|---|---|
| | A | B |
| **Total respondents staying in paid accommodations** | **2374** | **2247** |
| **Hotel/Motel/Resort/B&B (NET)** | **56%** | **55%** |
| At a hotel/motel/historic inn | 33% | 35% |
| At a resort | 23%b | 20% |
| At a Bed and Breakfast | <1% | 1% |
| **Condo/Cottage/Vacation Home/Timeshare (NET)** | **42%** | **42%** |
| **RV Park/Campground (NET)** | **2%** | **3%a** |

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



# Trip Profile

## Quality of Accommodations

| | 2014 | 2015 |
|---|---|---|
| | A | B |
| **Total respondents staying in paid accommodations** | **2374** | **2247** |
| Far exceeded/Exceeded expectations | 44%b | 37% |
| Met your expectations | 51% | 57%a |
| Did not meet/Far below expectations | 3% | 3% |
| No Answer | 2% | 2% |

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

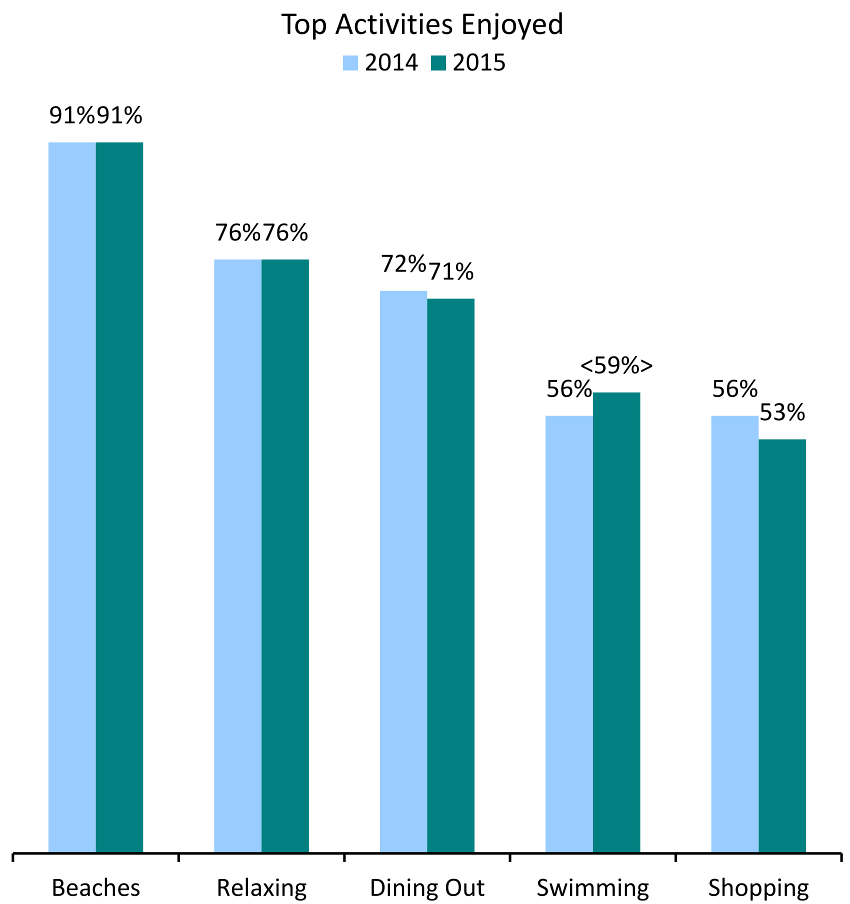
## Ratings by Subgroup

| | First-Timers | | Repeaters | | U.S. Residents | | International Residents | |
|---|---|---|---|---|---|---|---|---|
| | 2014 | 2015 | 2014 | 2015 | 2014 | 2015 | 2014 | 2015 |
| | A | B | A | B | A | B | A | B |
| **Total respondents staying in paid accommodations** | **762** | **783** | **1582** | **1425** | **1787** | **1644** | **576** | **575** |
| Far exceeded/Exceeded expectations | 43%b | 32% | 44%b | 40% | 43%b | 39% | 46%b | 32% |
| Met your expectations | 52% | 60%a | 51% | 56%a | 52% | 55%a | 49% | 62%a |
| Did not meet/Far below expectations | 3% | 4% | 3% | 3% | 3% | 4% | 2% | 2% |
| No Answer | 2% | 4%a | 2% | 1% | 2% | 2% | 2% | 4% |

# Trip Activities

| Activities Enjoyed | 2014 | 2015 |
|---|---|---|
| | A | B |
| **Total Respondents** | **3701** | **3743** |
| Beaches | 91% | 91% |
| Relaxing | 76% | 76% |
| Dining Out | 72% | 71% |
| Swimming | 56% | 59%a |
| Shopping | 56% | 53% |
| Sightseeing | 37% | 41%a |
| Shelling | 36% | 36% |
| Visiting Friends/Relatives | 30% | 33%a |
| Watching Wildlife | 23% | 25% |
| Attractions | 25% | 23% |
| Photography | 17% | 20%a |
| Bicycle Riding | 18% | 18% |
| Exercise/Working Out | 16% | 18% |
| Birdwatching | 14% | 16%a |
| Bars/Nightlife | 14% | 14% |
| Golfing | 12% | 13% |
| Fishing | 11% | 12% |
| Boating | 12% | 12% |
| Miniature Golf | 8% | 10%a |
| Kayaking/Canoeing | 8% | 8% |
| Guided Tour | 6% | 7% |
| Sporting Event | 5% | 5% |
| Cultural Events | 5% | 5% |
| Parasailing /Jet Skiing | 6% | 5% |
| Tennis | 4% | 4% |
| Scuba Diving/Snorkeling | 2% | 2% |
| Other | 3% | 2% |
| No Answer | 1% | 1% |

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

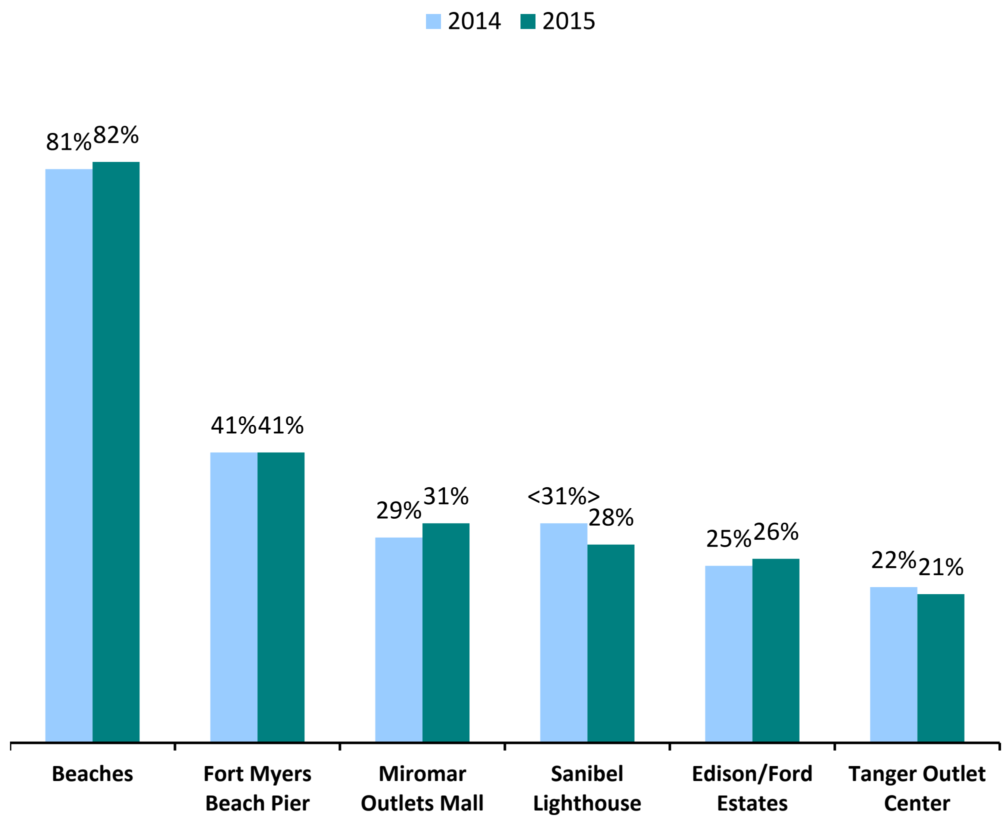


## Trip Activities

| Attractions Visited | | |
|---|---|---|
| | **2014** | **2015** |
| | **A** | **B** |
| **Total Respondents** | **3701** | **3743** |
| Beaches | 81% | 82% |
| Fort Myers Beach Pier | 41% | 41% |
| Miromar Outlets Mall | 29% | 31% |
| Sanibel Lighthouse | 31%b | 28% |
| Edison/Ford Estates | 25% | 26% |
| Tanger Outlet Center | 22% | 21% |
| Ding Darling National Wildlife Refuge | 16% | 15% |
| Coconut Point Mall | 13%b | 11% |
| Periwinkle Place | 13%b | 11% |
| Gulf Coast Town Center | 9% | 10% |
| Bell Tower Shops | 11% | 10% |
| Shell Factory and Nature Park | 9% | 10% |
| Edison Mall | 8% | 8% |
| Manatee Park | 5% | 5% |
| Bailey-Matthews Shell Museum | 3% | 3% |
| Broadway Palm Dinner Theater | 2% | 2% |
| Barbara B. Mann Performing Arts Hall | 1% | 1% |
| Babcock Wilderness Adventures | 1% | 1% |
| Other | 5% | 5% |
| None/No Answer (NET) | 5% | 5% |

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

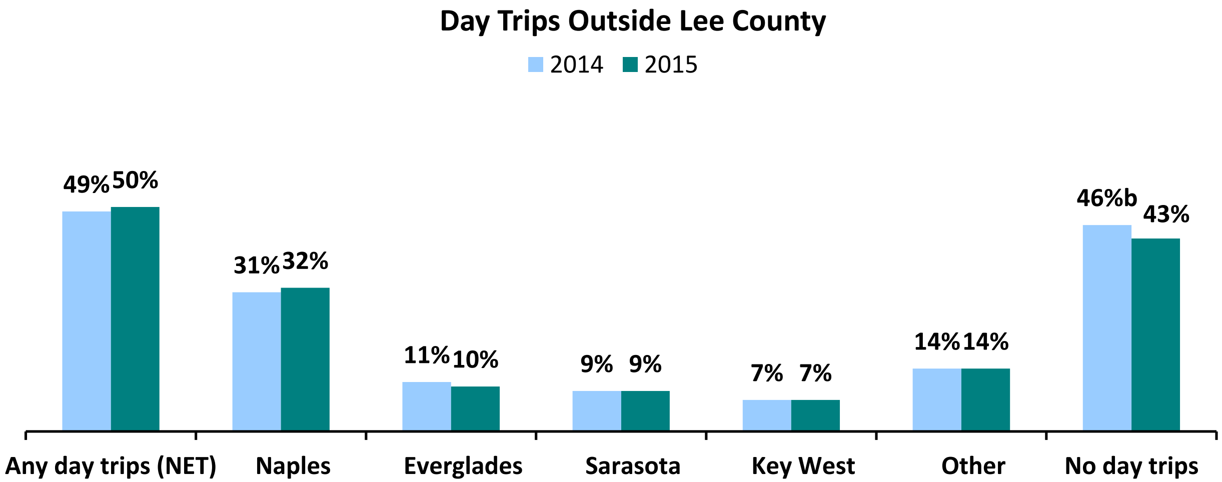
**Top Attractions Visited**



# Trip Activities

| Day Trips Outside Lee County | | |
|---|---|---|
| | **2014** | **2015** |
| | **A** | **B** |
| **Total Respondents** | **3701** | **3743** |
| Any day trips (NET) | 49% | 50% |
| *Naples* | 31% | 32% |
| *Everglades* | 11% | 10% |
| *Sarasota* | 9% | 9% |
| *Key West* | 7% | 7% |
| *Other* | 14% | 14% |
| No day trips | 46%b | 43% |
| No Answer | 13% | 14% |

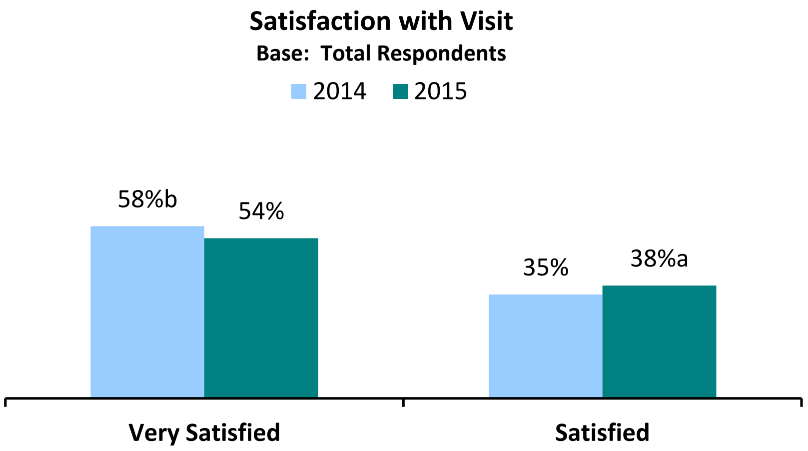
Q25: Where did you go on day trips outside Lee County?



# Lee County Experience

| Satisfaction with Visit | | |
|---|---|---|
| | Total Respondents | |
| | 2014 | 2015 |
| | A | B |
| **Total Respondents** | **3701** | **3743** |
| Very Satisfied/Satisfied | 93%b | 92% |
| *Very Satisfied* | 58%b | 54% |
| *Satisfied* | 35% | 38%a |
| Neither | 2% | 2% |
| Dissatisfied/Very Dissatisfied | 1% | 1% |
| Don't know/No answer | 5% | 6%a |

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




| Ratings by Subgroup | First-Timers | | Repeaters | | U.S. Residents | | International Residents | |
|---|---|---|---|---|---|---|---|---|
| | 2014 | 2015 | 2014 | 2015 | 2014 | 2015 | 2014 | 2015 |
| | A | B | A | B | A | B | A | B |
| **Total Respondents** | **1026** | **1174** | **2626** | **2503** | **2824** | **2784** | **857** | **907** |
| Very Satisfied/Satisfied | 91%b | 88% | 94% | 94% | 94% | 93% | 93% | 91% |
| *Very Satisfied* | 43%b | 35% | 65% | 63% | 61% | 59% | 50%b | 40% |
| *Satisfied* | 47% | 53%a | 30% | 31% | 33% | 34% | 42% | 52%a |

## Future Plans

| Likelihood to Recommend/Return to Lee County | | |
|---|---|---|
| | 2014 | 2015 |
| | A | B |
| **Total Respondents** | **3701** | **3743** |
| Likely to Recommend Lee County | 88%b | 85% |
| Likely to Return to Lee County | 88% | 88% |
| **Base: Total Respondents Planning to Return** | **3241** | **3276** |
| Likely to Return Next Year | 57% | 59% |

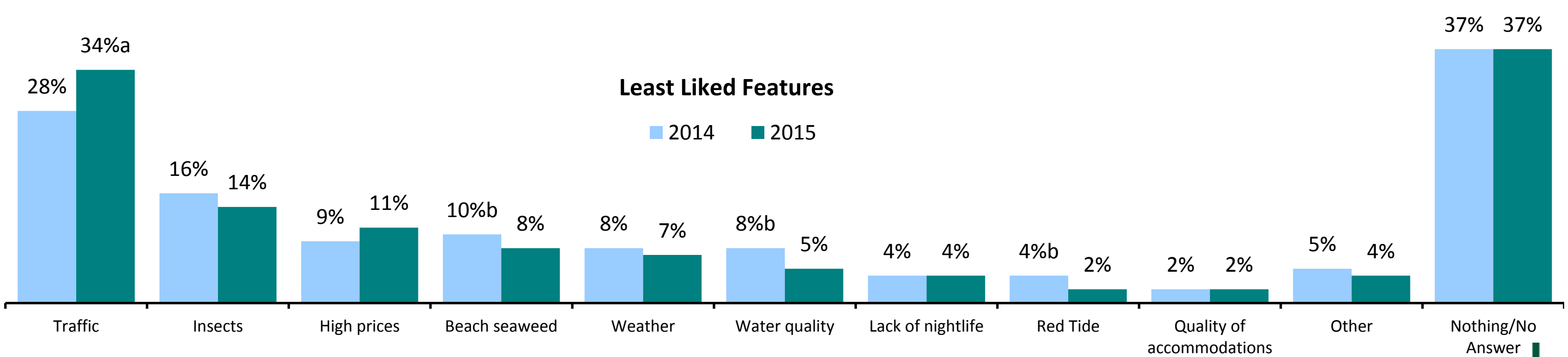
Q27: Would you recommend Lee County to a friend over other vacation areas in Florida?
Q31: Will you come back to Lee County?
Q32: Will you come back next year?

| Ratings by Subgroup | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| | First-Timers | | Repeaters | | U.S. Residents | | International Residents | |
| | 2014 | 2015 | 2014 | 2015 | 2014 | 2015 | 2014 | 2015 |
| | A | B | A | B | A | B | A | B |
| **Total Respondents** | **1026** | **1174** | **2626** | **2503** | **2824** | **2784** | **857** | **907** |
| Likely to Recommend Lee County | 81% | 78% | 91%b | 89% | 88%b | 86% | 88%b | 84% |
| Likely to Return to Lee County | 74% | 78%a | 93% | 92% | 89% | 89% | 82% | 85% |
| **Base: Total Respondents Planning to Return** | **759** | **912** | **2448** | **2310** | **2526** | **2469** | **705** | **771** |
| Likely to Return Next Year | 25% | 35%a | 66% | 68% | 60% | 61% | 47% | 50% |

# Lee County Experience

| Least Liked Features | 2014 | 2015 |
|---|---|---|
| | A | B |
| **Total Respondents** | **3701** | **3743** |
| Traffic | 28% | 34%a |
| Insects | 16% | 14% |
| High prices | 9% | 11% |
| Beach seaweed | 10%b | 8% |
| Weather | 8% | 7% |
| Water quality | 8%b | 5% |
| Lack of nightlife | 4% | 4% |
| Red Tide | 4%b | 2% |
| Quality of accommodations | 2% | 2% |
| Other | 5% | 4% |
| Nothing/No Answer | 37% | 37% |

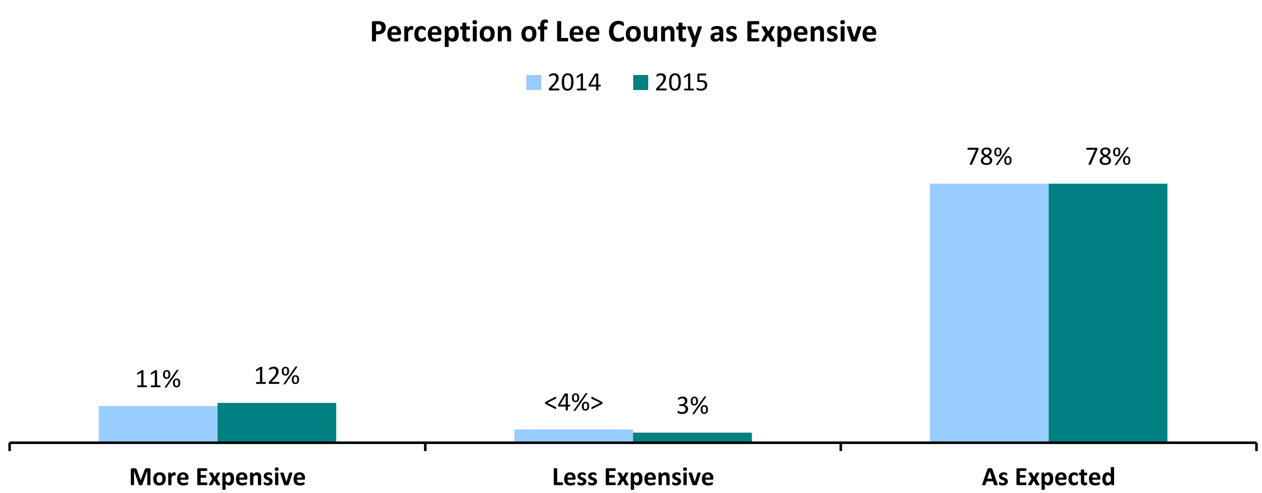
Q29: During this specific visit, which features have you liked **LEAST** about our area? (*Please mark ALL that apply.)*



## Lee County Experience

| Perception of Lee County as Expensive | | |
|---|---|---|
| | 2014 | 2015 |
| | A | B |
| **Total Respondents** | **3701** | **3743** |
| More Expensive | 11% | 12% |
| Less Expensive | 4%b | 3% |
| As Expected | 78% | 78% |
| Don't know/No Answer (NET) | 7% | 7% |

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



# Visitor and Travel Party Demographic Profile

## Visitor Demographic Profile

| | 2014 | 2015 |
|---|---|---|
| | A | B |
| **Total Respondents** | **3701** | **3743** |
| Age of respondent (mean) | 52.0 | 51.8 |
| Annual household income (mean) | $106,249b | $99,852 |
| Martial Status | | |
| Married | 74% | 74% |
| Single | 13% | 12% |
| Vacations per year (mean) | 3.0 | 3.0 |
| Short getaways per year (mean) | 3.7 | 3.7 |

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

## Travel Party

| | 2014 | 2015 |
|---|---|---|
| | A | B |
| **Total Respondents** | **3701** | **3743** |
| Couple | 40% | 44%a |
| Family | 34%b | 31% |
| Single | 9% | 8% |
| Group of couples/friends | 14% | 14% |
| | | |
| Mean travel party size | 3.1b | 3.0 |
| Mean adults in travel party | 2.7b | 2.6 |

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

## Travel Parties with Children

| | 2014 | 2015 |
|---|---|---|
| | A | B |
| **Total Respondents** | **3701** | **3743** |
| Traveling with any Children (net) | 23%b | 21% |
| Any younger than 6 | 9% | 8% |
| Any ages 6-11 | 10% | 9% |
| Any 12-17 years old | 12%b | 11% |
| No Children | 77% | 79%a |

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 | | |
|---|---|---|---|---|---|
| | 2014 | 2015 | 2014 | 2015 | % Change |
| Paid Accommodations | 60% | 61% | 3,015,974 | 3,023,021 | 0.2% |
| Friends/Relatives | 40% | 39% | 1,987,596 | 1,895,742 | -4.6% |
| **Total Visitation** | | | **5,003,570** | **4,918,763** | **-1.7%** |

## Paid Accommodations Visitors

| | % | | Visitor Estimates | | |
|---|---|---|---|---|---|
| **Country of Origin** | **2014** | **2015** | **2014** | **2015** | **% Change** |
| United States | 76% | 74% | 2,279,842 | 2,240,688 | -1.7% |
| Germany | 8% | 9% | 250,055 | 272,590 | 9.0% |
| Canada | 6% | 6% | 176,059 | 196,265 | 11.5% |
| UK | 5% | 6% | 139,061 | 177,183 | 27.4% |
| Scandinavia | 2% | 1% | 51,032 | 44,977 | -11.9% |
| BeNeLux | 1% | 1% | 31,895 | 24,533 | -23.1% |
| Switzerland | 1% | 1% | 30,619 | 21,807 | -28.8% |
| France | 1% | <1% | 15,310 | 12,267 | -19.9% |
| Latin America | <1% | <1% | 8,931 | 12,267 | 37.4% |
| Austria | <1% | <1% | 5,103 | 5,452 | 6.8% |
| Ireland | <1% | <1% | 2,552 | 1,363 | -46.6% |
| Other International | 1% | <1% | 25,516 | 13,629 | -46.6% |

| U.S. Region of Origin | 2014 | 2015 | 2014 | 2015 | % Change |
|---|---|---|---|---|---|
| Florida | 7% | 8% | 160,947 | 176,539 | 9.7% |
| South (including Florida) | 22% | 23% | 503,514 | 510,945 | 1.5% |
| Midwest | 50% | 50% | 1,145,827 | 1,110,159 | -3.1% |
| Northeast | 24% | 24% | 556,671 | 533,012 | -4.3% |
| West | 3% | 4% | 73,829 | 86,572 | 17.3% |

## 2015 Top DMAs (Paid Accommodations)

| | | |
|---|---|---|
| Minneapolis-Saint Paul | 5.9% | 132,404 |
| Boston (Manchester, NH) | 5.8% | 129,009 |
| New York | 5.7% | 127,312 |
| Chicago | 4.9% | 110,337 |
| Indianapolis | 4.6% | 103,547 |
| Cleveland-Akron (Canton) | 3.6% | 79,782 |
| Detroit | 3.5% | 78,085 |
| Columbus, OH | 3.4% | 76,387 |
| Philadelphia | 2.7% | 59,412 |
| Cincinnati | 2.6% | 57,715 |
| Miami-Fort Lauderdale | 2.2% | 49,227 |
| Milwaukee | 2.0% | 44,135 |

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

## Occupancy Data Analysis
## 2015

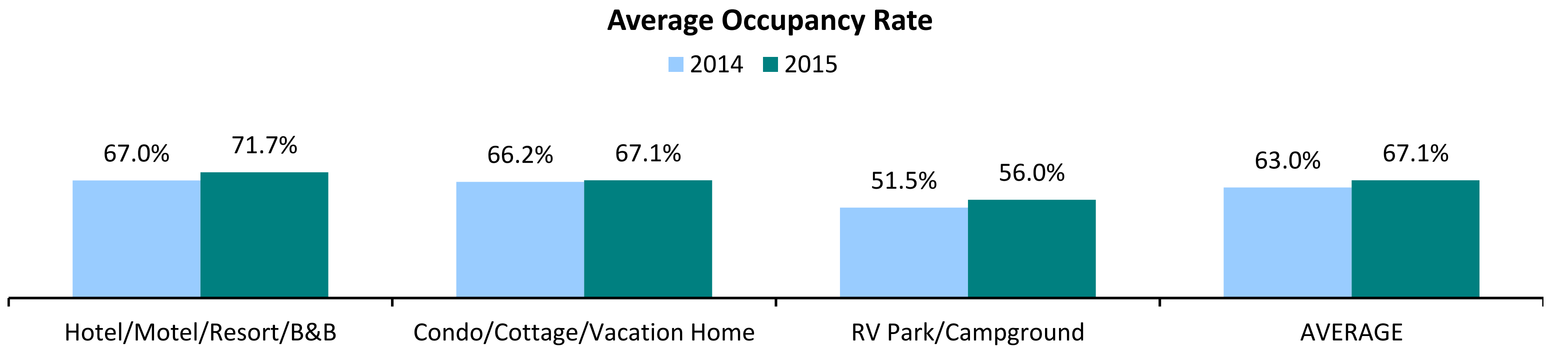
*For each calendar year, property managers were contacted quarterly to provide data for the preceding three months according to the following schedule:*

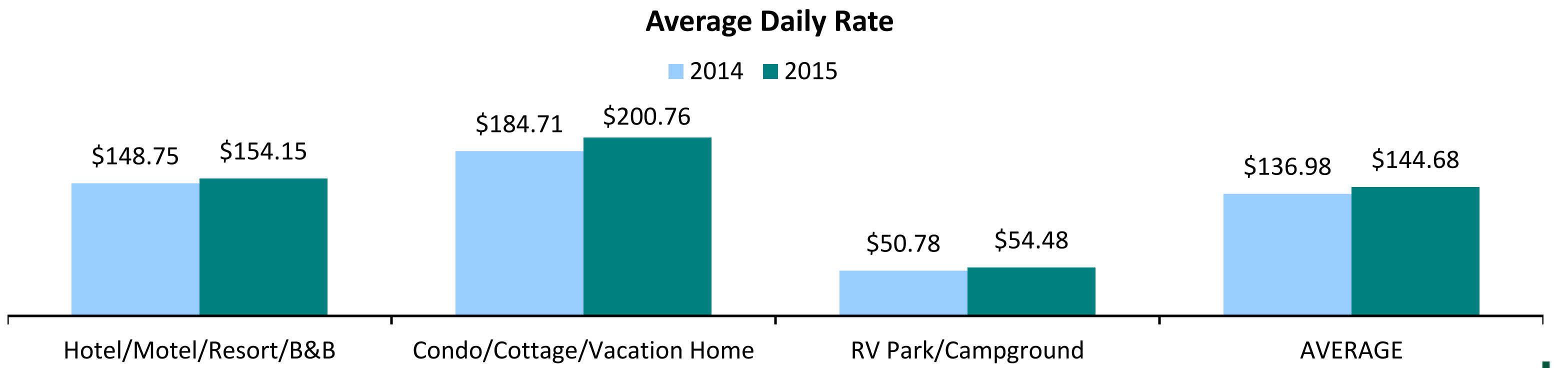
| Quarter | Month 1 | Month 2 | Month 3 | Data Collected in: | |
|---|---|---|---|---|---|
| 1 | January | February | March | April 2014 | April 2015 |
| 2 | April | May | June | July 2014 | July 2015 |
| 3 | July | August | September | October 2014 | October 2015 |
| 4 | October | November | December | January 2015 | January 2016 |

## Occupancy/Daily Rates

| | Average Occupancy Rate | | | Average Daily Rate | | | RevPAR | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2014 | 2015 | % Change | 2014 | 2015 | % Change | 2014 | 2015 | % Change |
| Hotel/Motel/Resort/B&B | 67.0% | 71.7% | 7.0% | $148.75 | $154.15 | 3.6% | $99.68 | $110.57 | 10.9% |
| Condo/Cottage/Vacation Home | 66.2% | 67.1% | 1.3% | $184.71 | $200.76 | 8.7% | $122.31 | $134.71 | 10.1% |
| RV Park/Campground | 51.5% | 56.0% | 8.7% | $50.78 | $54.48 | 7.3% | $26.17 | $30.53 | 16.7% |
| **AVERAGE** | **63.0%** | **67.1%** | **6.5%** | **$136.98** | **$144.68** | **5.6%** | **$86.34** | **$97.10** | **12.5%** |

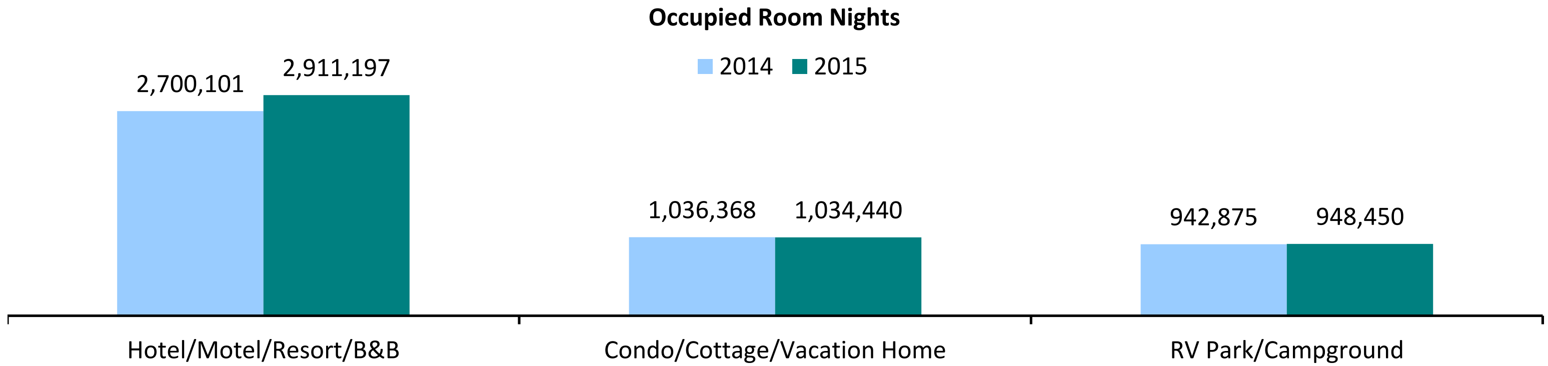
Q16: What was your average occupancy rate for each of these months [MONTH 1/MONTH 2/MONTH 3]?
Q17: What was your average daily rate (ADR) for each of these months [MONTH 1/MONTH 2/MONTH 3]?

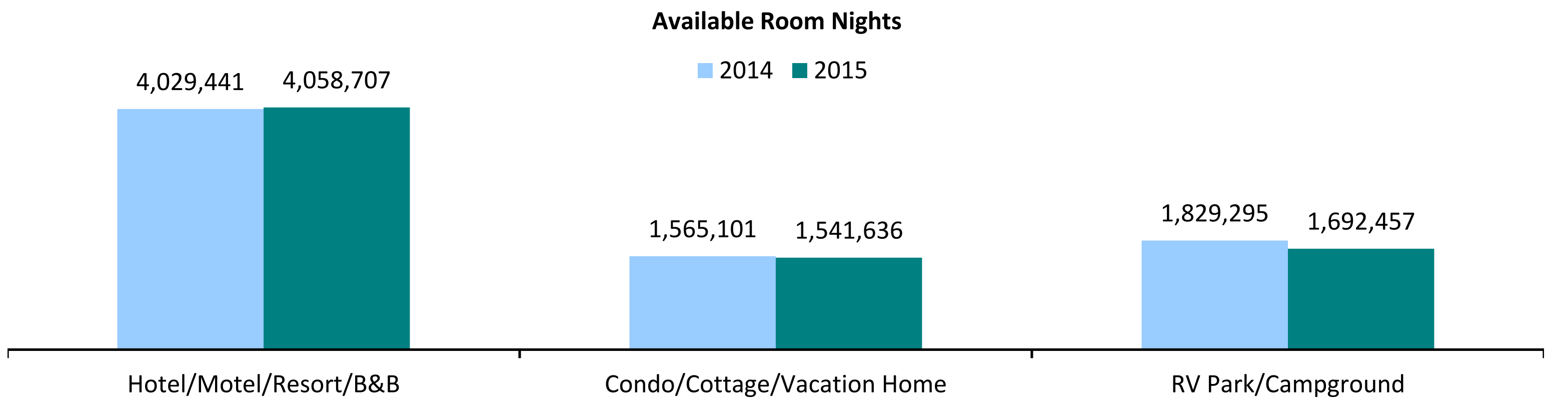


# Room/Unit/Site Nights

| | Occupied Room Nights | | | Available Room Nights | | |
|---|---|---|---|---|---|---|
| | **2014** | **2015** | **% Change** | **2014** | **2015** | **% Change** |
| Hotel/Motel/Resort/B&B | 2,700,101 | 2,911,197 | 7.8% | 4,029,441 | 4,058,707 | 0.7% |
| Condo/Cottage/Vacation Home | 1,036,368 | 1,034,440 | -0.2% | 1,565,101 | 1,541,636 | -1.5% |
| RV Park/Campground | 942,875 | 948,450 | 0.6% | 1,829,295 | 1,692,457 | -7.5% |
| **Total** | **4,679,344** | **4,894,087** | **4.6%** | **7,423,837** | **7,292,800** | **-1.8%** |



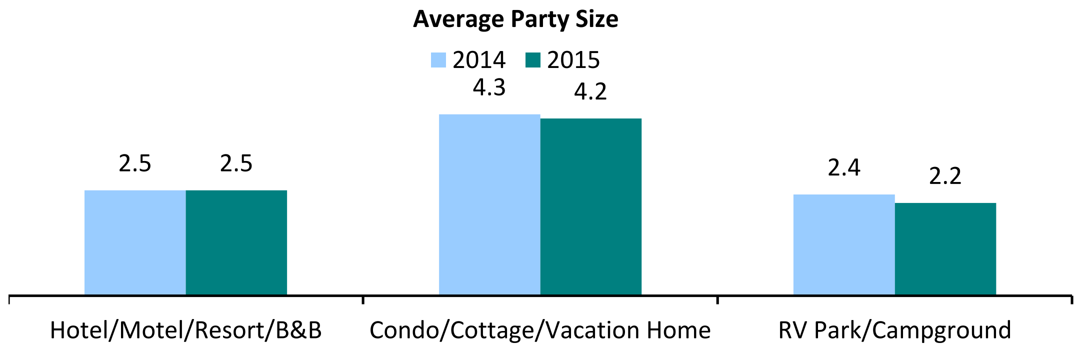



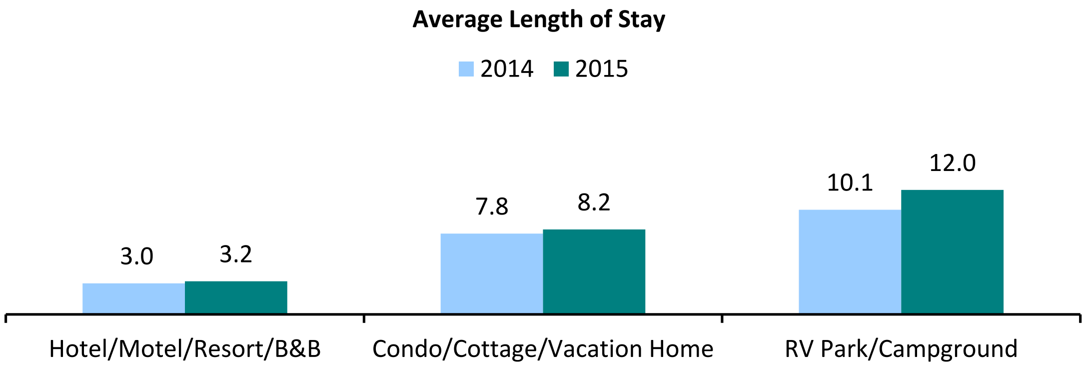
# Average Party Size and Length of Stay

| | Average Party Size | | | Average Length of Stay | | |
|---|---|---|---|---|---|---|
| | **2014** | **2015** | **% Change** | **2014** | **2015** | **% Change** |
| Hotel/Motel/Resort/B&B | 2.5 | 2.5 | 2.4% | 3.0 | 3.2 | 6.4% |
| Condo/Cottage/Vacation Home | 4.3 | 4.2 | -0.7% | 7.8 | 8.2 | 4.9% |
| RV Park/Campground | 2.4 | 2.2 | -6.2% | 10.1 | 12.0 | 18.8% |
| **Average** | **2.8** | **2.8** | **-0.6%** | **4.4** | **4.6** | **3.7%** |

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

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

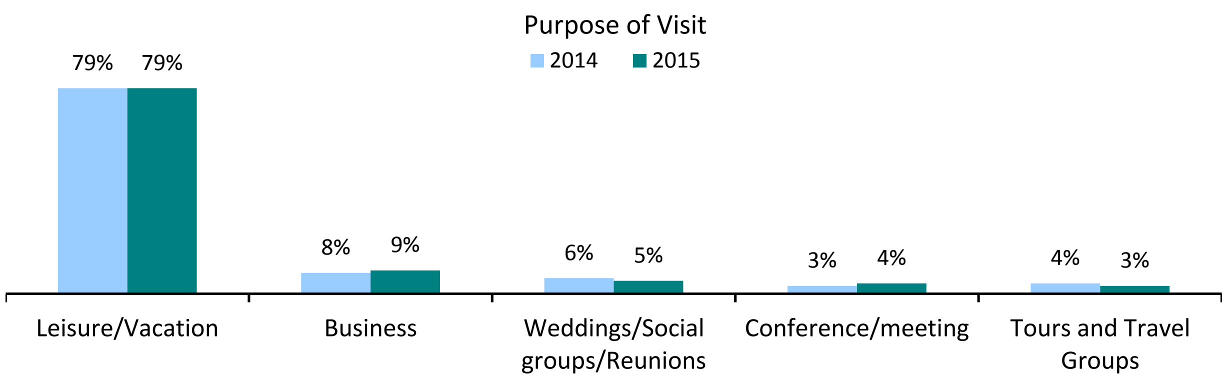


# Lodging Management Estimates

| Guest Profile | | |
|---|---|---|
| | 2014 | 2015 |
| | A | B |
| **Property Managers Responding** | **390** | **394** |
| Purpose of Visit | | |
| Leisure/Vacation | 79% | 79% |
| Business | 8% | 9% |
| Weddings/Social Groups/Reunions (net) | 6% | 5% |
| Conference/Meeting | 3% | 4% |
| Tour and Travel Groups | 4% | 3% |

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



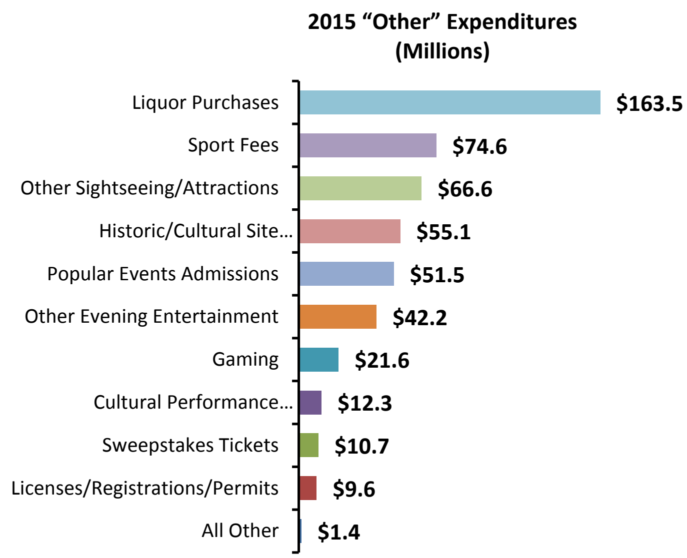
**Economic Impact Analysis**

**2015**

# Total Visitor Expenditures by Spending Category

| TOTAL EXPENDITURES | | | |
|---|---|---|---|
| | **2014** | **2015** | **% Change** |
| TOTAL | $2,865,097,777 | $2,997,115,778 | 4.6% |
| Food and Beverages | $737,024,866 | $759,778,132 | 3.1% |
| Shopping | $739,923,835 | $747,065,269 | 1.0% |
| Lodging Accommodations | $640,962,901 | $708,097,216 | 10.5% |
| Ground Transportation | $264,003,267 | $273,079,182 | 3.4% |
| Other | $483,182,908 | $509,095,979 | 5.4% |

(Note: Other includes the categories detailed below.)




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

## Total Visitor Expenditures by Lodging Type

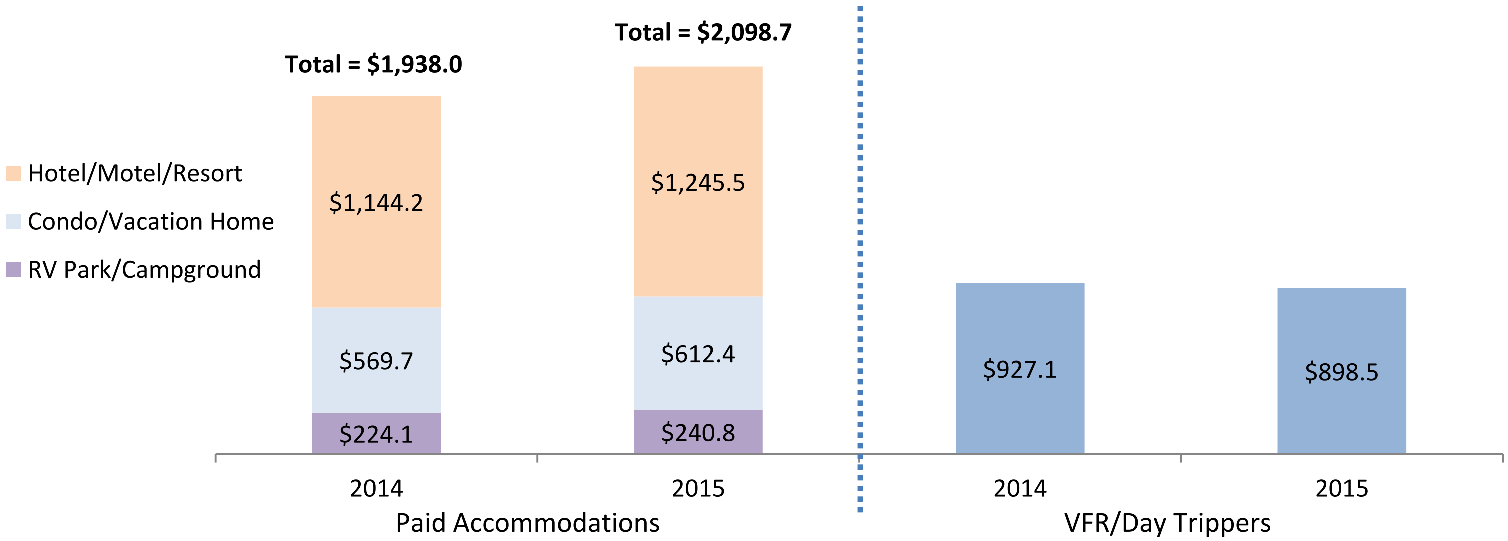
| TOTAL EXPENDITURES | | | | | | |
|---|---|---|---|---|---|---|
| | Staying Paid Accommodations | | | Visiting Friends and Relatives/Day Trippers | | |
| | 2014 | 2015 | % Change | 2014 | 2015 | % Change |
| TOTAL | $1,938,003,424 | $2,098,652,554 | 8.3% | $927,094,353 | $898,463,224 | -3.1% |
| Lodging Accommodations | $640,962,901 | $708,097,216 | 10.5% | $0 | $0 | - |
| Food and Beverages | $431,735,827 | $462,296,237 | 7.1% | $305,289,039 | $297,481,895 | -2.6% |
| Shopping | $421,527,189 | $449,801,646 | 6.7% | $318,396,646 | $297,263,623 | -6.6% |
| Ground Transportation | $165,088,374 | $176,259,311 | 6.8% | $98,914,893 | $96,819,871 | -2.1% |
| Other | $278,689,133 | $302,198,144 | 8.4% | $204,493,775 | $206,897,835 | 1.2% |

"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 | | | | | |
|---|---|---|---|---|---|
| | 2014 | 2015 | % Change | 2014 | 2015 |
| TOTAL | $2,865,097,777 | $2,997,115,778 | 4.6% | 100% | 100% |
| Visiting Friends & Relatives/Day Trippers | $927,094,353 | $898,463,224 | -3.1% | 32% | 30% |
| Paid Accommodations | $1,938,003,424 | $2,098,652,554 | 8.3% | 68% | 70% |
| *Hotel/Motel/Resort/B&B* | $1,144,229,178 | $1,245,483,345 | 8.8% | 40% | 42% |
| *Condo/Cottage/Vacation Home* | $569,689,146 | $612,356,656 | 7.5% | 20% | 20% |
| *RV Park/Campground* | $224,085,100 | $240,812,553 | 7.5% | 8% | 8% |

**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.

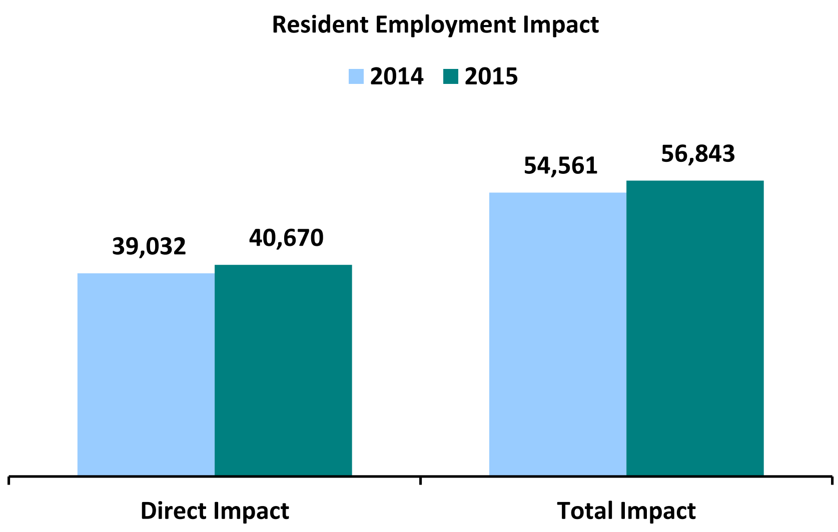
# Impact on Jobs for Lee County Residents

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.).



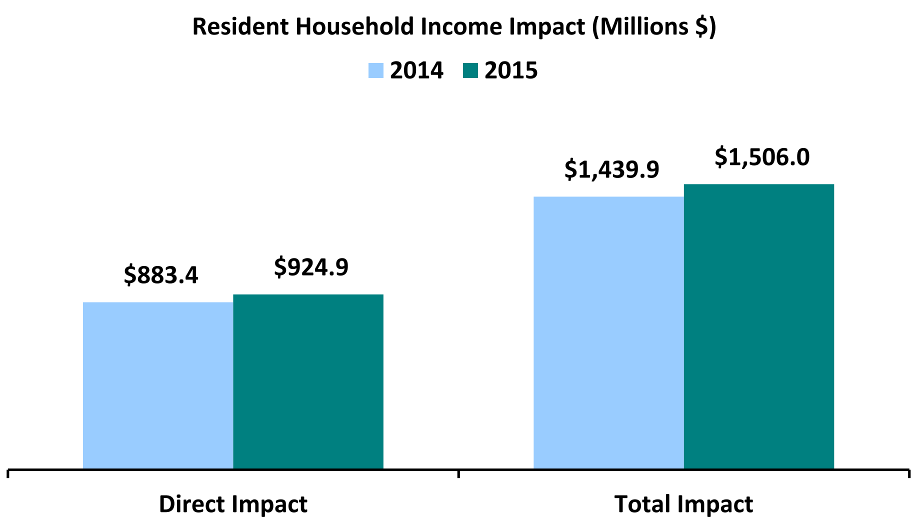
# Impact on Household Income for Lee County Residents

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.

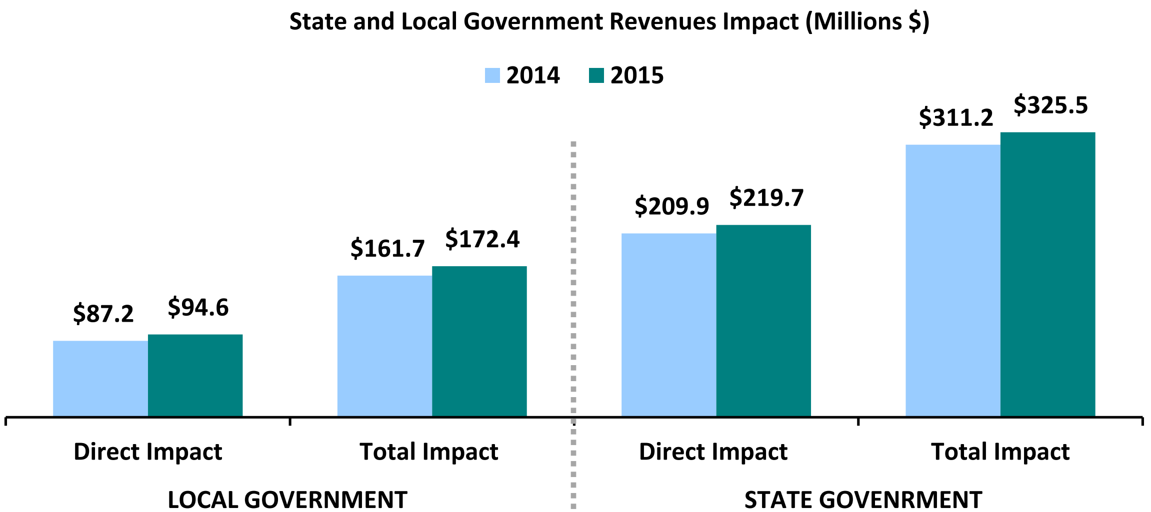
The gross government revenues accruing to governments as a result of producing the output purchased with visitor expenditures is the government revenue impact.

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).



THE BEACHES OF FORT MYERS AND SANIBEL

# Appendix
# 2015

## 2015 Interviewing Locations

| City | Event/Location |
|---|---|
| Bonita Springs | Bonita Beach |
| Cape Coral | Cape Coral Yacht Club |
| Estero | Miromar Outlets |
| Fort Myers | Centennial Park |
| Fort Myers | Edison-Ford Estates |
| Fort Myers | Hammond Stadium (Spring Training) |
| Fort Myers | Jet Blue Park (Spring Training) |
| Fort Myers | RSW Airport |
| Fort Myers Beach | Bel Air Beach Club |
| Fort Myers Beach | Best Western Beach Resort |
| Fort Myers Beach | Cane Palm Condos |
| Fort Myers Beach | DiamondHead Beach Resort |
| Fort Myers Beach | Estero Beach Club |
| Fort Myers Beach | Fort Myers Beach & Pier |
| Fort Myers Beach | Neptune Inn |
| Fort Myers Beach | Sunset Celebration - Fort Myers Beach |
| Fort Myers Beach | Times Square Area |
| Fort Myers Beach | Winward Passage |

| City | Event/Location |
|---|---|
| Sanibel | Casa Ybel |
| Sanibel | Compass Point |
| Sanibel | Coquina Beach |
| Sanibel | Holiday Inn – Sanibel |
| Sanibel | Lighthouse Beach |
| Sanibel | Loggerhead Cay |
| Sanibel | Pelican Roost |
| Sanibel | Pointe Santos |
| Sanibel | Sanibel Inn |
| Sanibel | Sanibel Siesta |
| Sanibel | Sanibel Surfside |
| Sanibel | Sundial |
| Sanibel | Tarpon Beach Resort Club |
| Sanibel | Tortuga Beach Club |

**Seasonal Comparisons:**

**Key Statistics**

**2015**

| | Winter 2015 | | YOY % Change | Spring 2015 | | YOY % Change | Summer 2015 | | YOY % Change | Fall 2015 | | YOY % Change |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Visitation** | | | | | | | | | | | | |
| Total Visitation | | 1,397,956 | -1.6% | | 1,299,863 | -4.8% | | 1,103,230 | 0.5% | | 1,117,714 | -0.2% |
| Paid Accommodations | | 776,164 | -0.2% | | 795,752 | -4.9% | | 728,080 | 5.0% | | 723,025 | 2.1% |
| Visiting Friends/Relatives | | 621,792 | -3.2% | | 504,111 | -4.7% | | 375,150 | -7.2% | | 394,689 | -4.2% |
| | | | | | | | | | | | | |
| **Visitor Origin by Country** | | | | | | | | | | | | |
| United States | 81% | 630,633 | -3.7% | 83% | 661,278 | -2.1% | 68% | 492,999 | 3.6% | 62% | 451,360 | -2.5% |
| Germany | 4% | 31,466 | 50.9% | 5% | 40,203 | -39.0% | 13% | 95,376 | 18.7% | 15% | 108,949 | 23.5% |
| Canada | 8% | 64,243 | 23.2% | 6% | 48,521 | 28.8% | 4% | 25,523 | -27.4% | 8% | 59,427 | 18.3% |
| United Kingdom | 3% | 26,222 | 151.4% | 4% | 29,113 | 20.2% | 8% | 59,106 | 30.7% | 9% | 63,671 | 2.0% |
| Other International | 3% | 23,600 | -34.3% | 2% | 16,636 | -50.5% | 8% | 55,076 | -2.5% | 5% | 39,618 | -11.5% |
| | | | | | | | | | | | | |
| **Visitor Origin by US Region** | | | | | | | | | | | | |
| Midwest | 60% | 375,864 | 3.6% | 46% | 303,510 | -12.2% | 38% | 184,875 | 8.9% | 52% | 236,600 | 13.6% |
| Northeast | 24% | 149,402 | 12.1% | 26% | 174,645 | 6.0% | 20% | 98,600 | -28.6% | 25% | 111,020 | 3.3% |
| South (incl. Florida) | 14% | 88,068 | 7.0% | 23% | 152,603 | 1.9% | 39% | 191,917 | 23.4% | 19% | 83,720 | -29.7% |
| West | 3% | 17,299 | -0.5% | 5% | 30,521 | 103.8% | 4% | 17,607 | 38.7% | 4% | 20,020 | -28.8% |
| | | | | | | | | | | | | |
| **In-State Visitors** | **3%** | **17,299** | **35.7%** | **9%** | **59,345** | **52.4%** | **16%** | **79,232** | **6.2%** | **5%** | **21,840** | **-49.2%** |
| | | | | | | | | | | | | |
| **Total Visitor Expenditures** | | **$1,129,495,160** | **5.1%** | | **$705,436,023** | **3.1%** | | **$497,945,851** | **3.9%** | | **$664,238,744** | **5.9%** |
| Paid Accommodations | | $822,847,372 | 7.8% | | $472,583,652 | 7.5% | | $333,721,725 | 8.0% | | $469,499,805 | 10.2% |
| Visiting Friends/Relatives | | $306,647,788 | -1.5% | | $232,852,371 | -4.8% | | $164,224,126 | -3.5% | | $194,738,939 | -3.1% |

| Visitor Profile Survey | Winter 2015 | Spring 2015 | Summer 2015 | Fall 2015 |
|---|---|---|---|---|
| # of Interviews Completed | 950 | 932 | 924 | 937 |
| | | | | |
| Percentage Flying to Lee County | 64% | 73% | 72% | 76% |
| | | | | |
| First-time Visitors | 28% | 34% | 37% | 26% |
| Repeat Visitors | 70% | 63% | 62% | 73% |
| | | | | |
| Average Length of Stay | 9.5 | 7.4 | 8.1 | 9.1 |
| | | | | |
| Satisfaction with Visit | | | | |
| Very Satisfied/Satisfied | 90% | 91% | 92% | 94% |
| *Very Satisfied* | 51% | 56% | 50% | 58% |
| *Satisfied* | 39% | 36% | 42% | 36% |
| | | | | |
| Likely to Recommend | 80% | 83% | 87% | 91% |
| Likely to Return | 86% | 86% | 88% | 90% |
| | | | | |
| Average Age | 56.5 | 52.2 | 47.5 | 51.6 |
| Average Household Income | $101,053 | $100,512 | $95,838 | $102,517 |
| Married | 75% | 75% | 73% | 73% |
| Traveling as a couple | 49% | 44% | 41% | 44% |
| Traveling as a family | 24% | 32% | 38% | 29% |
| Traveling with children | 14% | 21% | 32% | 19% |
| Average Travel Party Size | 2.8 | 2.9 | 3.3 | 2.9 |

| Occupancy Survey | Winter 2015 | YOY % Change | Spring 2015 | YOY % Change | Summer 2015 | YOY % Change | Fall 2015 | YOY % Change |
|---|---|---|---|---|---|---|---|---|
| | | | | | | | | |
| **Available Roomnights** | | | | | | | | |
| Hotel/Motel/Resort/B&B | 1,004,411 | 1.4% | 1,018,226 | 0.3% | 1,010,165 | 1.3% | 1,025,905 | -0.1% |
| Condo/Cottage/Vacation Home | 372,839 | -5.5% | 384,069 | -7.7% | 385,902 | 2.6% | 398,826 | 5.3% |
| RV Park/Campground | 423,450 | -1.0% | 404,417 | -19.0% | 436,726 | -6.6% | 427,864 | -1.6% |
| **Total** | **1,800,700** | **-0.7%** | **1,806,712** | **-6.4%** | **1,832,793** | **-0.4%** | **1,852,595** | **0.7%** |
| | | | | | | | | |
| **Occupied Roomnights** | | | | | | | | |
| Hotel/Motel/Resort/B&B | 883,487 | 6.0% | 716,580 | 6.0% | 618,669 | 8.9% | 692,461 | 11.2% |
| Condo/Cottage/Vacation Home | 329,693 | -1.8% | 281,514 | -5.2% | 181,863 | 7.1% | 241,370 | 3.1% |
| RV Park/Campground | 404,654 | 2.0% | 158,452 | -7.0% | 118,407 | -11.4% | 266,937 | 10.3% |
| **Total** | **1,617,834** | **3.3%** | **1,156,546** | **1.2%** | **918,939** | **5.4%** | **1,200,768** | **9.3%** |
| | | | | | | | | |
| **Occupancy Rates** | | | | | | | | |
| Hotel/Motel/Resort/B&B | 88.0% | 4.6% | 70.4% | 5.7% | 61.2% | 7.4% | 67.5% | 11.3% |
| Condo/Cottage/Vacation Home | 88.4% | 3.9% | 73.3% | 2.7% | 47.1% | 4.4% | 60.5% | -2.1% |
| RV Park/Campground | 95.6% | 3.0% | 39.2% | 15.0% | 27.1% | -5.2% | 62.4% | 12.1% |
| **Average** | **89.8%** | **4.0%** | **64.0%** | **8.1%** | **50.1%** | **5.7%** | **64.8%** | **8.6%** |
| | | | | | | | | |
| **Average Daily Rates** | | | | | | | | |
| Hotel/Motel/Resort/B&B | $196.48 | 5.5% | $149.43 | 3.8% | $122.13 | 1.3% | $133.62 | 3.2% |
| Condo/Cottage/Vacation Home | $258.66 | 8.5% | $180.73 | 12.2% | $159.12 | 3.5% | $176.39 | 10.1% |
| RV Park/Campground | $64.19 | 7.0% | $44.65 | 2.9% | $44.30 | 9.3% | $50.13 | 7.6% |
| **Average** | **$176.06** | **6.4%** | **$142.69** | **7.0%** | **$119.42** | **4.1%** | **$123.66** | **5.0%** |
| | | | | | | | | |
| **RevPAR** | | | | | | | | |
| Hotel/Motel/Resort/B7B | $172.83 | 10.3% | $105.16 | 9.8% | $74.80 | 8.8% | $90.19 | 14.8% |
| Condo/Cottage/Vacation Home | $228.73 | 12.7% | $132.47 | 15.3% | $74.99 | 8.1% | $106.75 | 7.8% |
| RV Park/Campground | $61.34 | 10.2% | $17.49 | 18.1% | $12.01 | 3.6% | $31.28 | 20.7% |
| **Average** | **$158.18** | **10.7%** | **$91.34** | **15.7%** | **$59.88** | **10.2%** | **$80.15** | **14.0%** |

| Occupancy Barometer | Winter 2015 | Spring 2015 | Summer 2015 | Fall 2015 |
|---|---|---|---|---|
| **Purpose of Visit** | | | | |
| Leisure/Vacation | 84% | 78% | 76% | 78% |
| Business | 6% | 10% | 11% | 8% |
| Weddings/Social Groups/Reunions | 4% | 5% | 6% | 6% |
| Tour and Travel Groups | 4% | 3% | 4% | 4% |
| Conference/Meeting | 3% | 4% | 4% | 5% |
| | | | | |
| **Level of Reservations for Next Three Months vs. Last Year** | | | | |
| Up/Same (Net) | 89% | 79% | 88% | 88% |
| Up | 60% | 45% | 53% | 58% |
| Same | 29% | 34% | 35% | 30% |
| Down | 6% | 14% | 7% | 9% |