



Report to the Industry

February 9, 2017

Fall 2016 Statistics

During the fall of 2016, The Beaches of Fort Myers & Sanibel hosted more than 1.1 million visitors who spent an estimated \$656 million while visiting – a one percent drop in spending year-over-year. Visitors staying in paid accommodations spent an estimated \$477 million (73 percent of the total). Lee County’s lodging industry experienced a year-over-year decrease in average occupancy rate and small decrease in average daily rate for the season, translating to a slight drop in revenue per available room (RevPAR).

Occupancy Summary

	Average Occupancy Rate		Average Daily Rate		RevPAR	
	2015	2016	2015	2016	2015	2016
Hotel/Motel/Resort/B&B	67.5%	65.2%	\$133.62	\$132.35	\$90.19	\$86.3
Condo/Cottage/Vacation Home	60.5%	59.2%	\$176.39	\$186.28	\$106.75	\$110.22
RV Park/Campground	62.4%	64.5%	\$50.13	\$56.43	\$31.28	\$36.42
OVERALL	64.8%	63.8%	\$123.66	\$122.62	\$80.15	\$78.26

Visitation and Visitor Origins

Total Visitation				
	%		Visitor Estimates	
	2015	2016	2015	2016
Paid Accommodations	65%	67%	723,025	745,398
Friends/Relatives	35%	33%	394,689	362,598
Total Visitation			1,117,714	1,107,996

Visitor Origin – Paid Accommodations Visitors				
	%		Visitor Estimates	
	2015	2016	2015	2016
United States	62%	70%	451,360	520,401
Germany	15%	11%	108,949	82,652
Canada	8%	7%	59,427	55,101
UK	9%	4%	63,671	30,612
Other International	5%	8%	38,203	56,632

Top DMAs (Paid Accommodations)		
	Summer 2016	
Minneapolis-St.Paul	6%	31,843
Indianapolis	6%	29,631
New York	5%	27,779
Cleveland-Akron (Canton)	5%	27,779
Chicago	5%	25,927
Cincinnati	4%	22,224
Boston (Manchester, NH)	4%	20,372
Philadelphia	3%	14,816
Tampa-Saint Petersburg (Sarasota)	2%	12,964
Denver	2%	12,964
Detroit	2%	12,964

December Smith Travel Research Summary

Average Occupancy Rate			Average Daily Rate			RevPAR		
2015	2016	% Change	2015	2016	% Change	2015	2016	% Change
69.1%	64.8%	-6.2%	\$138.73	\$140.56	+1.3%	\$95.91	\$91.10	-5.0%

Bed tax collection

The preliminary resort tax collected for December 2016 was \$3,314,913, a 0.3 percent increase over December 2015 preliminary collections of \$3,124,516. Fiscal year-to-date preliminary tourist tax collections are \$7,386,764 an increase of 1.4 percent year-over-year.

Airport News

During December 2016, 840,501 passengers traveled through Southwest Florida International Airport (RSW). Figures represent an increase of 0.6 percent compared to December 2015. Year-to-date, passenger traffic is up 2.8 percent from the same period last year.

Lee County Visitation Update

Bob Domine, DPA, reported on the fall season and 2016 highlights. Visitation among 2016 visitors staying in paid accommodations held steady while expenditures increased to its highest level exceeding \$3 billion. About one-quarter of those guests were from international markets with Germany representing the largest share.

A 2016 review of the Hotel Industry

Ali Hoyt, STR, presented an overview of the Lee County hotel industry. While room demand and occupancy dipped slightly, both ADR and RevPAR increased in 2016. The industry is still at record-setting levels, but growth is slowing. For 2017 STR projects Lee County's average occupancy will decrease 0.5% to 69.3%, ADR will increase 2.8 to \$153.68 and RevPar will be up 2.3% at \$106.46.

VCB Departmental Reports

Marketing showcased two videos produced by Matador Network, which have already reached 90,000 views on the VCB Facebook page. The videos have been translated into German and Spanish and shared on social channels. Industry partners can imbed them in their social media platforms as well. Sports Development reported 157,000 room nights sold with direct visitor spending of more than \$67 million in 2016.

Next TDC meeting

There will be no TDC meeting in March. The next TDC meeting will be held on Thursday, April 13, 2017 at 9 a.m. at the Lee County Admin East building, first floor conference room 118, 2201 Second Street, Fort Myers, FL 33901. To view a complete tax collections report, go to www.LeeVCB.com. Contact: Tamara Pigott, TPigott@leegov.com, Lee County VCB, 239-338-3500.