

## Report to the Industry

February 14, 2019

### Fall 2018 Statistics

During the fall of 2018, The Beaches of Fort Myers & Sanibel hosted more than 1 million visitors who spent an estimated \$684 million while visiting – a 3 percent decrease in spending year-over-year. Visitors staying in paid accommodations spent an estimated \$500 million (73 percent of the total). Lee County’s lodging industry experienced a year-over-year decrease in average occupancy rate and average daily rate for the season, translating to a decrease in revenue per available room (RevPAR).

### Occupancy Summary

	Average Occupancy Rate		Average Daily Rate		RevPAR	
	2017	2018	2017	2018	2017	2018
Hotel/Motel/Resort/B&B	73.8%	64.5%	\$139.24	\$134.38	\$102.70	\$86.60
Condo/Cottage/Vacation Home	58.2%	48.9%	\$176.19	\$209.65	\$102.55	\$102.49
RV Park/Campground	67.3%	66.4%	\$52.61	\$54.98	\$35.40	\$36.52
<b>OVERALL</b>	<b>68.8%</b>	<b>61.8%</b>	<b>\$123.04</b>	<b>\$121.66</b>	<b>\$84.68</b>	<b>\$75.14</b>

### Visitation and Visitor Origins

Total Visitation				
	%		Visitor Estimates	
	2017	2018	2017	2018
Paid Accommodations	69%	68%	786,552	745,739
Friends/Relatives	31%	32%	352,374	354,069
<b>Total Visitation</b>			<b>1,138,926</b>	<b>1,099,808</b>

Visitor Origin – Paid Accommodations Visitors				
	%		Visitor Estimates	
	2017	2018	2017	2018
United States	74%	85%	582,292	633,617
Germany	8%	4%	59,449	31,290
Canada	9%	4%	74,692	29,986
Scandinavia	2%	2%	13,719	15,645
UK	4%	2%	35,059	13,037
Other International	3%	3%	21,340	22,163

Top DMAs (Paid Accommodations)		
	Fall 2018	
New York	6%	35,388
Philadelphia	5%	30,333
Miami-Fort Lauderdale	5%	30,333
Chicago	5%	28,648
Cincinnati	5%	28,648
Detroit	4%	25,277
Minneapolis-Saint Paul	3%	21,907
Boston (Manchester, NH)	3%	20,222
Indianapolis	3%	20,222
Atlanta	3%	18,537

## December Smith Travel Research Summary

Average Occupancy Rate			Average Daily Rate			RevPAR		
2017	2018	% Change	2017	2018	% Change	2017	2018	% Change
72.8%	66.3%	-8.9%	\$146.95	\$146.48	-0.3%	\$106.96	\$97.08	-9.2%

### Bed tax collection

The preliminary resort tax collected for December 2018 was \$3,537,771, a 0.5 percent increase over December 2017 preliminary collections of \$3,518,946. Fiscal year-to-date preliminary tourist tax collections are \$7,853,438 a decrease of 7.92 percent year-over-year.

### Airport News

During December 2018, 958,717 passengers traveled through Southwest Florida International Airport (RSW). Figures represent an increase of 9.8 percent compared to December 2017. Year-end passenger traffic was up 6 percent compared to last year.

### Lee County Visitation Update

Bob Domine, DPA, reported on the fall season 2018 highlights. Visitation among visitors staying in paid accommodations decreased by 5.2 percent, while total expenditures decreased 3.3 percent, coming in at \$684 million. Eight in 10 fall 2018 visitors staying in paid accommodations reside within the U.S. The majority of international visitors staying in paid accommodations came from Germany and Canada, with 4 percent each.

### Sports Development Update

Jeff Mielke, Sports Development director, reported 2018 year-end highlights including an increased number of annual events from 144 to 158 that resulted in a record-breaking 163,546 room nights sold, and direct visitor spending in excess of \$72 million.

### A Review of the 2018 Spring Training Impact

A [Spring Training Study](#) conducted during the 2018 season by Lee County Sports Development shows fans spend \$68.9 million annually and plan return trips to the destination. Of that amount, \$56.7 million was spent outside the ballpark. Lee County hosts two teams, the Boston Red Sox at JetBlue Park and the Minnesota Twins at CenturyLink Sports Complex.

### Branding Initiative

Stewart Colovin, MMGY Global executive vice president and chief creative officer, presented plans to develop a unified brand for the VCB, Economic Development and Sports Development. Plan highlights include interviewing stakeholders, local residents and visitors. The branding effort is expected to be completed by the end of the year.

### Next TDC meeting

The next TDC meeting will be held at 9 a.m. Friday, March 15, 2019, at the Lee County Admin East building, first floor conference room 118, 2201 Second St., Fort Myers, FL 33901. To view a complete tax collections report, go to [www.LeeVCB.com](http://www.LeeVCB.com). Contact: Tamara Pigott, [TPigott@leegov.com](mailto:TPigott@leegov.com), Lee County VCB, 239-338-3500.