



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

**2018 Annual Visitor Profile and Occupancy Analysis  
(January-December)**

**March 4, 2019**

**Prepared for:**

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

**Prepared by:**

**Davidson-Peterson Associates**



## Executive Summary

### 2018

#### A Note About “Statistical Significance”

*(Statistically significant difference = a difference that is large enough that it is not likely to occur by chance)*

This report includes comparisons between data collected last year (2017) and data collected this year (2018). In most cases, slight differences will be seen between the two years’ values due to random differences in the respondents taking the survey in each year. When these differences are not likely to be due to chance, then they are statistically significant.

A difference is said to be statistically significant (at the 95% confidence level) if the probability of the difference occurring purely by chance is less than 5%. In other words, if the same question were asked 100 times, these differences would be seen by chance in fewer than five of those instances.

Throughout this report, differences that rise to the level of statistical significance are marked by letters showing which column the marked percentage is significantly greater than. For example, the “A” in Column B of the table below indicates that 70% is statistically greater than the 60% in Column A.

2017 A	2018 B
60%	70%A

## Executive Summary

### Introduction

The following report summarizes the results from the Lee County Visitor Profile and Occupancy research study for Calendar Year 2018, with comparisons to Calendar Year 2017. 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 2018, Lee County hosted an estimated 4.8 million visitors. Almost two thirds of these visitors stayed in paid accommodations on their trip, while the remainder stayed with friends or relatives.
- 2018 visitation among paid accommodations, and among those staying with friends and relatives, was similar to 2017.
- As a result, there was no significant change in overall visitation year over year (-0.1%).

Estimated Visitation	2017	2018	% Change
Paid Accommodations	3,027,400	3,038,997	0.4%
Friends/Relatives	1,769,994	1,754,853	-0.9%
<b>Total Visitation</b>	<b>4,797,394</b>	<b>4,793,850</b>	<b>-0.1%</b>

### Visitor Expenditures

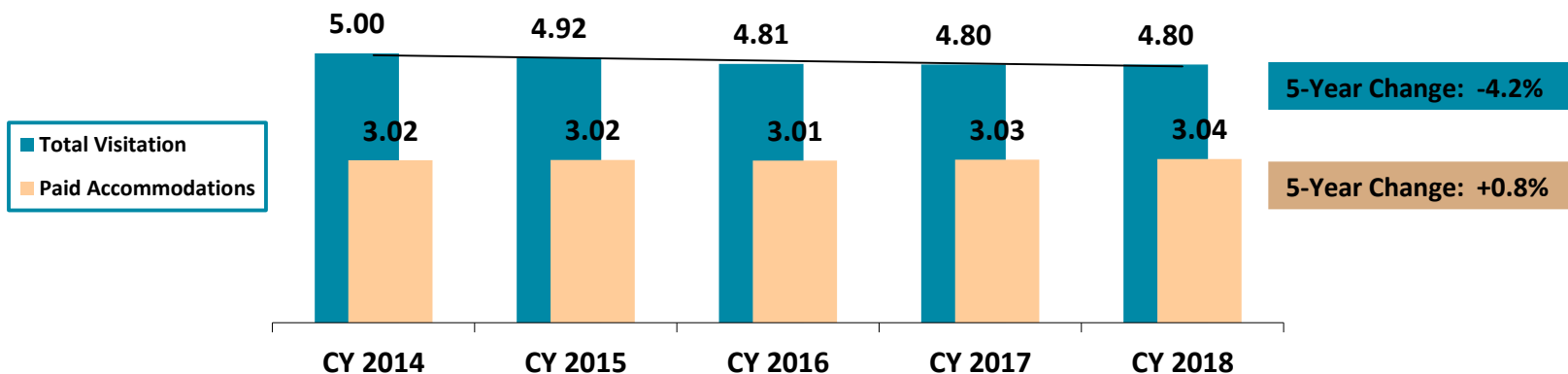
- Visitors spent an estimated \$3.1 billion in Lee County during 2018, a modest 1% increase over 2017.
- Visitors staying in paid accommodations contributed 2.2 billion (72% of the total), even with 2017. The VFR traveler segment showed a slight increase (+1.6%).

Estimated Expenditures	2017	2018	% Change
Paid Accommodations	\$2,222,342,586	\$2,239,802,711	0.8%
Friends/Relatives	\$862,829,417	\$876,988,708	1.6%
<b>Total Expenditures</b>	<b>\$3,085,172,003</b>	<b>\$3,116,791,419</b>	<b>1.0%</b>

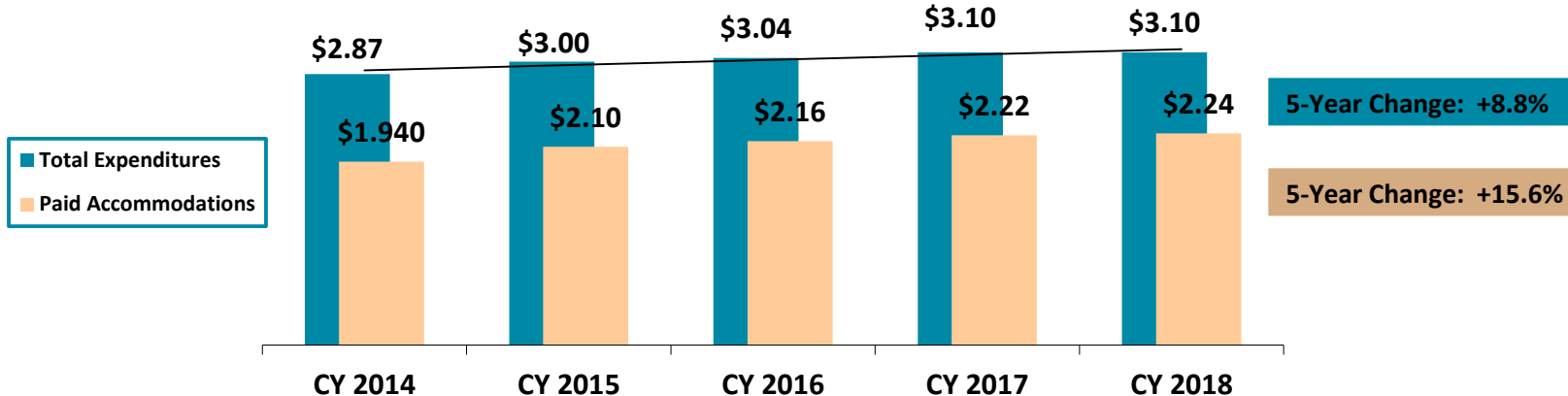
5-Year Trends in Visitation and Expenditures

- While estimated visitation in 2018 is lower than visitation levels five years ago, estimated visitor expenditures have climbed nearly 9% since 2014. Increases are even more significant when looking at visitors staying in paid accommodations – expenditures among those staying in paid accommodations has grown 15.6%.

**Estimated Visitation (in Millions)**



**Estimated Expenditures (in Billions)**

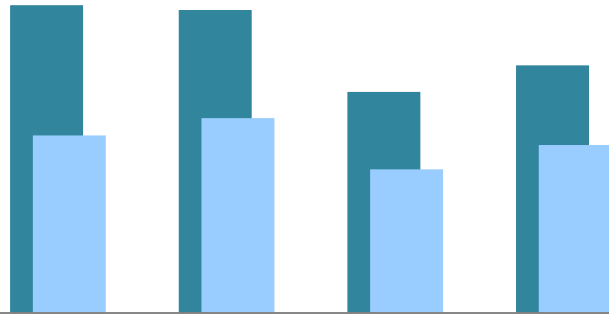


Visitation and Expenditure Estimates by Season

- The winter and spring seasons drove the highest levels of visitation during 2018. Visitor spending was highest during the winter season, amounting to 38% of the total expenditures for 2018.

**Estimated Visitation**

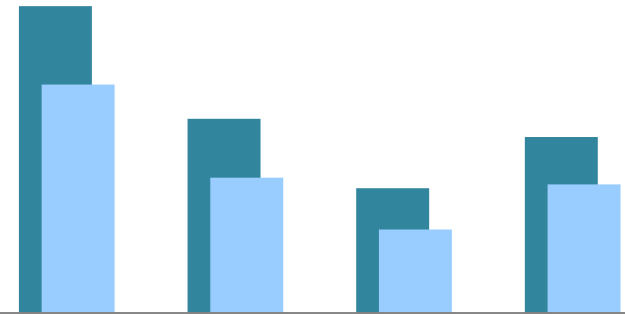
■ Total Visitation    ■ Paid Accommodations



	Winter 2018	Spring 2018	Summer 2018	Fall 2018
Total Visitation	1,367,085	1,345,197	981,760	1,099,808
Paid Accommodations	789,270	865,503	638,485	745,739

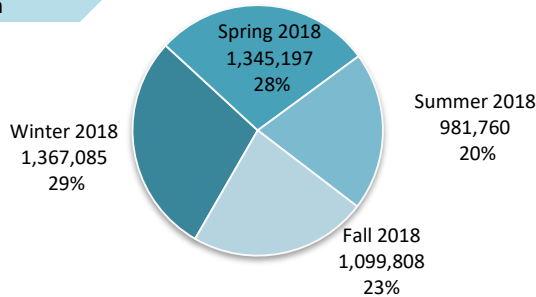
**Estimated Expenditures**

■ Total Expenditures    ■ Paid Accommodations

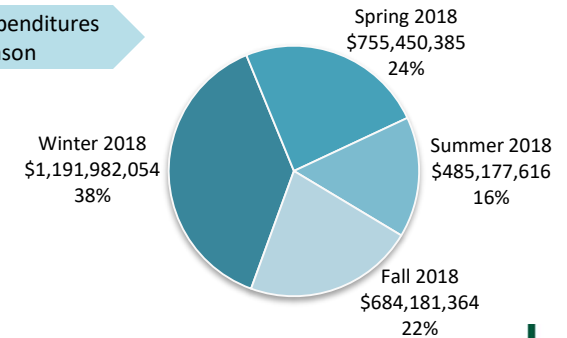


	Winter 2018	Spring 2018	Summer 2018	Fall 2018
Total Expenditures	\$1,191,982,054	\$755,450,385	\$485,177,616	\$684,181,364
Paid Accommodations	\$888,094,155	\$526,702,281	\$324,384,705	\$500,621,570

% of Total Visitation by Season



% of Total Expenditures by Season



### Visitor Origin

- The majority of 2018 visitors staying in paid accommodations were United States residents (86%), representing more than 2.6 million visitors. International markets delivered just over 412,000 visitors to Lee County’s lodging establishments – with Germany and Canada being the top contributors.
- Two in five domestic paid accommodations guests came from the Midwest (43%). The South (30%) contributed about one-third, and the Northeast (23%) contributed about one-fourth. Very few came from the West (4%).
- New York was the leading domestic feeder market for the Lee County lodging industry during 2018, followed by Chicago, Boston, and Minneapolis. The key Florida market was Tampa-St. Petersburg.

2018 Top DMAs (Paid Accommodations)			
New York	5.9%	154,221	1
Chicago	5.2%	136,893	2
Boston (Manchester, NH)	4.8%	126,496	3
Minneapolis-Saint Paul	4.4%	114,366	4
Tampa-St. Petersburg	3.8%	98,771	5
Miami-Fort Lauderdale	3.5%	91,839	6
Indianapolis	3.4%	90,107	7
Philadelphia	3.4%	90,107	8
Cincinnati	3.3%	86,641	9
Detroit	3.1%	81,442	10

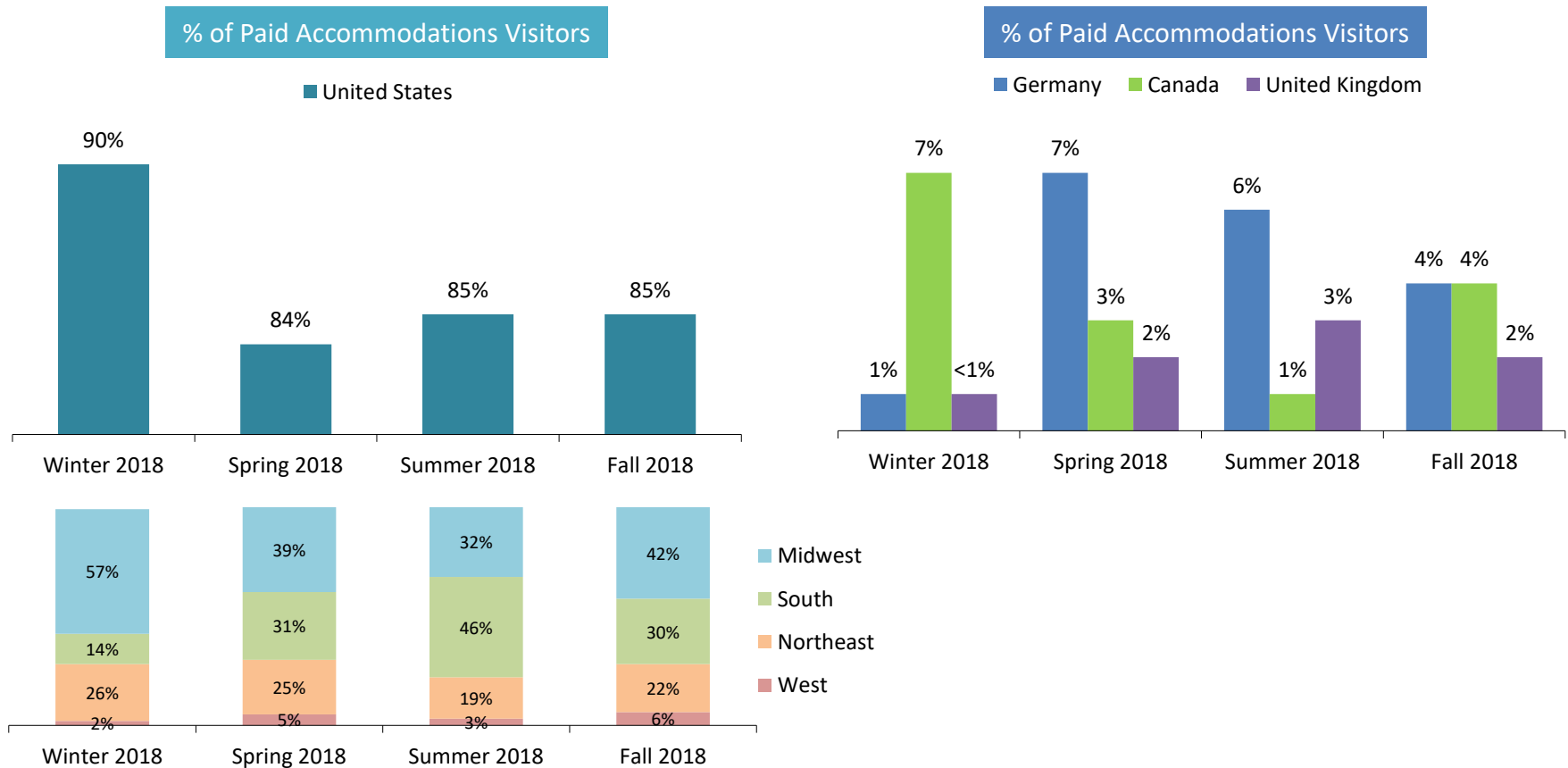
Visitors Staying in Paid Accommodations					
Country of Origin	%		Visitor Estimates		Direction of Change
	2017	2018	2017	2018	
United States	79%	86%	2,387,914	2,626,952	+
Germany	6%	4%	189,589	136,015	-
Canada	8%	4%	252,785	114,679	-
UK	3%	2%	81,252	49,339	-
Other International	4%	4%	115,860	112,012	-

Visitors Staying in Paid Accommodations					
U.S. Region of Origin	%		Visitor Estimates		Direction of Change
	2017	2018	2017	2018	
Florida	7%	11%	166,960	289,381	+
South (including Florida)	24%	30%	564,946	786,699	+
Midwest	47%	43%	1,120,184	1,124,599	+
Northeast	25%	23%	597,949	608,219	+
West	4%	4%	104,835	107,435	+

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

Visitor Origins by Season

- Visitor origin distribution varied by season. While the U.S. markets dominated as the majority each season, the proportion of U.S. residents staying in Lee County paid accommodations was highest in the winter season.
- U.S. visitors from the Midwest were more likely to visit during the winter and fall seasons, while visitors from the South were more likely to visit Lee County during the summer.
- On the international front, Germans contributed a larger share in the spring and summer seasons while Canadians were most prevalent during the winter.





## Trip Planning

- Most visitors started planning their Lee County trip well in advance of arrival. More than half selected Lee County as their destination three or more months in advance. Fewer made their lodging reservations within that timeframe.
  - 58% chose Lee County for trip 3+ months in advance (vs. 63% in 2017)
  - 56% made lodging reservation 3+ months in advance (vs. 58% in 2017)
- The Internet continues to be an instrumental planning tool for visitors in 2018. One-third mentioned using airline websites – the highest level of mentions (34%). Fewer 2018 visitors used search engines (23%), hotel websites (22%), Trip Advisor (21%), and booking websites (20%) to aid in planning their trip.
- The attributes that 2018 visitors rated highest for having positively influenced their selection of Lee County as a destination were:
  - *Warm weather (85%),*
  - *Peaceful/relaxing (81%),*
  - *White sandy beaches (78%),*
  - *A safe destination (73%),*
  - *Clean, unspoiled environment (69%),* and
  - *Convenient location (68%).*

## Trip Profile

- Flying continues to be the primary means of transportation to Lee County among 2018 visitors, with three-fourths flying to the area (75% vs. 76% in 2017). Four in five air travelers deplaned at Southwest Florida International Airport (80%).
- Four in five visitors in 2018 had been to Lee County before (80% vs. 74% in 2017). Eight in ten visitors said the purpose of their trip was to vacation (80%, down from 85% in 2017), while one-third indicated they were visiting friends or relatives (35%).
- Six in ten visitors surveyed said they were staying overnight in paid accommodations during their 2018 Lee County trip. Six in ten then paid accommodations guests indicated they were staying in a hotel/motel/resort (59%). Fewer stayed in a condo/vacation home property (39%), and a small minority stayed at an RV park/campground (2%). The majority felt the quality of their lodging *met expectations* (56%), and two in five said the quality *far exceeded* or *exceeded expectations* (38%).
- Nine in ten visitors claimed to be enjoying Lee County's *beaches* (90%) during their trip. Further, when asked which attractions they were visiting, beaches received the highest level of mentions at 82% (vs. 86% in 2017). Many visitors also enjoyed *dining out* (73%), *relaxing* (70%), *shopping* (55%), and *swimming* (54%) while in Lee County. Two in five 2018 visitors took a day trip outside the County (44%), and those that did were most likely to visit Naples (29%).
- Visitor satisfaction remains exceptionally high in Lee County – almost all 2018 visitors said they were either *very satisfied* or *satisfied* with their visit (54% and 39% respectively), and nearly as many indicated they would recommend Lee County to a friend over other areas in Florida (87%). Additionally, most visitors said they are likely to return to Lee County themselves (88%), and half of these travelers claimed they will return next year (52%).
- 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 2018 visitors was *traffic* (29%), followed closely by *Red Tide* (22% - up significantly from 6% in 2017). Far fewer mentioned *insects* (12%), *beach seaweed* (13%), *high prices* (9%), and *water quality* (14% vs. 9% in 2017) as unfavorable features.

### Visitor and Travel Party Characteristics

- The composition of 2018 visitors and their travel parties can be summarized as follows:
  - 52 years of age on average (age of respondent)
  - \$105,800 household income on average
  - 75% married
  - 41% traveling as a couple
  - 36% traveling as a family
  - 29% traveling *with* children
  - 4 people in travel party on average

### Lodging Industry Assessments

- For the Lee County lodging industry in total, there was an increase of 136,233 in *occupied* room nights (+2.6%), from 2017 to 2018, as well as an increase of 492,390 *available* room nights (+6.5%).

	Occupied Room Nights			Available Room Nights		
	2017	2018	% Change	2017	2018	% Change
Hotel/Motel/Resort/B&B	2,958,106	2,905,961	-1.8%	4,101,441	4,187,735	2.1%
Condo/Cottage/Vacation Home	1,030,580	1,032,657	0.2%	1,541,882	1,658,300	7.6%
RV Park/Campground	1,165,828	1,352,129	16.0%	1,985,751	2,275,429	14.6%
<b>Total</b>	<b>5,154,514</b>	<b>5,290,747</b>	<b>2.6%</b>	<b>7,629,074</b>	<b>8,121,464</b>	<b>6.5%</b>

- The industry-wide average occupancy rate in Lee County decreased slightly from 67.6% in 2017 to 65.2% in 2018 (-3.6%).
- Lee County's average daily rate also decreased slightly year-over-year. Hotel/motel/resort properties saw relatively no change in ADR versus the prior year.
- Due to the drops in average occupancy rate and ADR, overall revenue per available room saw a 6.2% decrease from 2017 to 2018.

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2017	2018	% Change	2017	2018	% Change	2017	2018	% Change
Hotel/Motel/Resort/B&B	72.1%	69.4%	-3.7%	\$157.96	\$159.16	0.8%	\$113.93	\$110.45	-3.1%
Condo/Cottage/Vacation Home	66.8%	62.3%	-6.7%	\$213.71	\$208.47	-2.5%	\$142.84	\$129.82	-9.1%
RV Park/Campground	58.7%	59.4%	1.2%	\$56.11	\$54.64	-2.6%	\$32.94	\$32.47	-1.4%
<b>AVERAGE</b>	<b>67.6%</b>	<b>65.2%</b>	<b>-3.6%</b>	<b>\$146.07</b>	<b>\$142.07</b>	<b>-2.7%</b>	<b>\$98.69</b>	<b>\$92.55</b>	<b>-6.2%</b>

## 2018 Lee County Snapshot

Total Visitation				
	%		Visitor Estimates	
	2017	2018	2017	2018
Paid Accommodations	63%	63%	3,027,400	3,038,997
Friends/Relatives	37%	37%	1,769,994	1,754,853
<b>Total Visitation</b>			<b>4,797,394</b>	<b>4,793,850</b>

Visitor Origin - Visitors Staying in Paid Accommodations				
	%		Visitor Estimates	
	2017	2018	2017	2018
Florida	7%	11%	166,960	289,381
US	79%	86%	2,387,914	2,626,952
Germany	6%	4%	189,589	136,015
Canada	8%	4%	252,785	114,679
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Other International	4%	4%	115,860	112,012

Total Visitor Expenditures			
	2017	2018	% Change
Total Visitor Expenditures	\$3,085,172,003	\$3,116,791,419	1.0%
Paid Accommodations	\$2,222,342,586	\$2,239,802,711	0.8%

First-Time/Repeat Visitors to Lee County		
	2017	2018
	A	B
<b>Total Respondents</b>	<b>3430</b>	<b>3744</b>
First-time	24%b	18%
Repeat	74%	80%a

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2017	2018	% Change	2017	2018	% Change	2017	2018	% Change
Hotel/Motel/Resort/B&B	72.1%	69.4%	-3.8%	\$157.96	\$159.16	0.8%	\$113.93	\$110.45	-3.1%
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<b>AVERAGE</b>	<b>67.6%</b>	<b>65.2%</b>	<b>-3.6%</b>	<b>\$146.07</b>	<b>\$142.07</b>	<b>-2.7%</b>	<b>\$98.69</b>	<b>\$92.55</b>	<b>-6.2%</b>

## Visitor Profile Analysis 2018

*A total of 3,744 interviews were conducted with visitors in Lee County during the months of January – December 2018. A total sample of this size is considered accurate to plus or minus 1.6 percentage points at the 95% confidence level.*

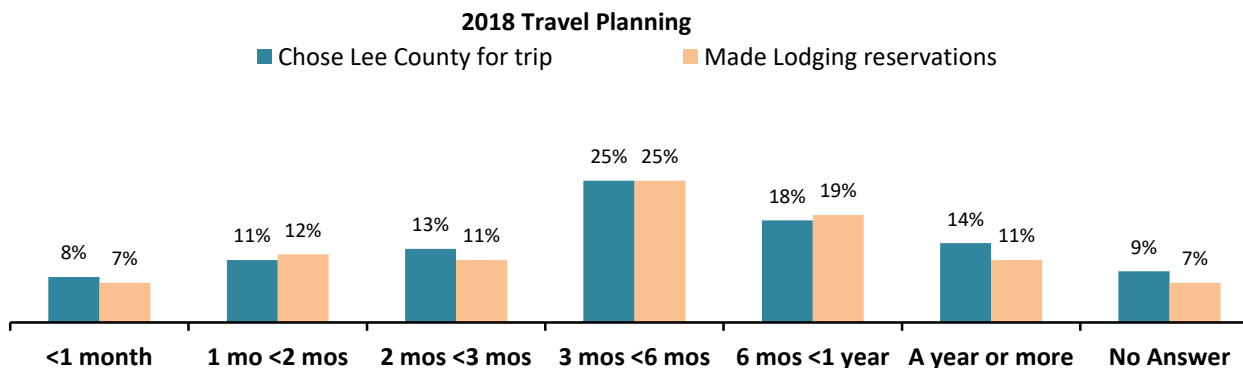
*A total of 3,430 interviews were conducted with visitors in Lee County during the months of January – December 2017. A total sample of this size is considered accurate to plus or minus 1.6 percentage points at the 95% confidence level. **Due to Hurricane Irma, visitor interviewing was not conducted during the month of September 2017, resulting in a slightly smaller sample size for 2017 than seen in prior years.***

## Travel Planning

	Chose Lee County for Trip		Made Lodging Reservations*	
	2017	2018	2017	2018
	A	B	A	B
<b>Total Respondents</b>	<b>3430</b>	<b>3744</b>	<b>2053*</b>	<b>2333*</b>
<u>Less than 3 months (NET)</u>	<u>31%</u>	<u>31%</u>	<u>34% b</u>	<u>30%</u>
<1 month	6%	8% a	7%	7%
1 month - <2 months	12%	11%	13%	12%
2 months - <3 months	13%	13%	14% b	11%
<u>3 months or more (NET)</u>	<u>63% b</u>	<u>58%</u>	<u>58%</u>	<u>56%</u>
3 months - <6 months	28% b	25%	30% b	25%
6 months - <1 year	19%	18%	19%	19%
A year or more	16%	14%	9%	11% a
No Lodging Reservations Made	N/A	N/A	5%	5%
No Answer	6%	9% a	2%	7% a

Q4: When did you choose Lee County for this trip?

Q5: When did you make lodging reservations for this trip?



\* Base: Among those staying in paid accommodations

## Travel Planning

Considered Other Destinations*	
	2018
<b>Total Respondents</b>	<b>3744</b>
Yes	81%
No	17%
No Answer	1%

Q6: When you were planning this trip, did you consider any destinations other than Lee County?

*\*This question was added in January 2018, so prior year (2017) data is not available.*

Travel Websites Visited		
	2017	2018
	A	B
<b>Total Respondents</b>	<b>3430</b>	<b>3744</b>
<u>Visited websites (net)</u>	<u>84% b</u>	<u>77%</u>
Airline websites	42% b	34%
Search engines	27% b	23%
Hotel websites	23%	22%
Trip Advisor	21%	21%
Booking websites	22%	20%
AirBnb, VRBO, Home away, etc,	6%	14% a
Vacation rental websites	23% b	14%
<a href="http://www.FortMyers-Sanibel.com">www.FortMyers-Sanibel.com</a>	9%	9%
Facebook	7%	8%
Visit Florida	7%	7%
Other	10%	9%
None/Didn't visit websites	15%	20% a
No Answer	2%	3%

Q7: While planning this trip, which of the following web sites did you visit? (Please mark ALL that apply.)



## Travel Planning

Travel Information Requested		
	2017	2018
	A	B
<b>Total Respondents</b>	<b>3430</b>	<b>3744</b>
<u>Requested information (NET)</u>	<u>17%</u>	<u>18%</u>
Call hotel/motel/condo	6%	7%
Visitor Guide	3%	3%
E-Newsletter	1%	1%
Call local Chamber of Commerce	<1%	1%
Call VCB	<1%	1%
Other	8%	8%
<u>None/Did not request information</u>	<u>83%</u>	<u>82%</u>

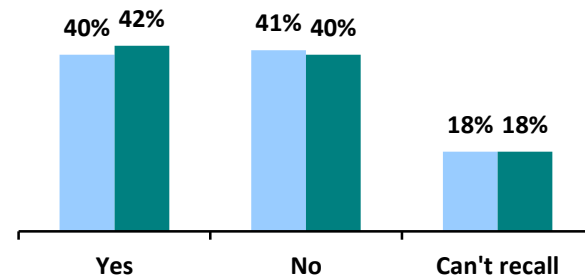
Q8: For this trip, did you request any information about our area by:  
(Please mark ALL that apply.)

Recall of Lee County Promotions		
	2017	2018
	A	B
<b>Total Respondents</b>	<b>3430</b>	<b>3744</b>
Yes	40%	42%
No	41%	40%
Can't Recall	18%	18%

Q9: 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?

### Recall of Promotions

■ 2017 ■ 2018



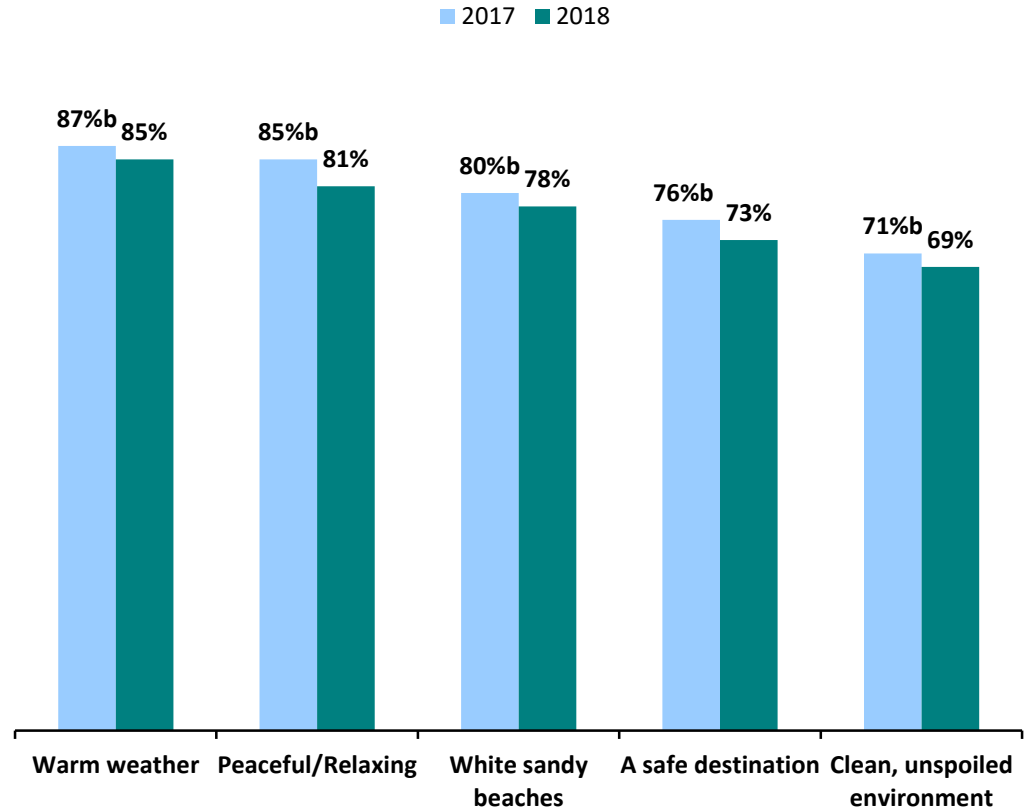
## Travel Planning

Travel Decision Influences*		
	2017	2018
	A	B
<b>Total Respondents</b>	<b>3430</b>	<b>3744</b>
Warm weather	87% b	85%
Peaceful/Relaxing	85% b	81%
White sandy beaches	80% b	78%
A safe destination	76% b	73%
Clean, unspoiled environment	71% b	69%
Convenient location	70%	68%
Good value for the money	63% b	61%
Plenty to see and do	62% b	59%
A "family" atmosphere	54%	57% a
Reasonably priced lodging	54% b	50%

Q10: When you were talking about coming to Lee County, if one (1) is "Not at All Influential" and five (5) is "Definitely Influential," how strongly did the following influence your selection?

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

### Top Travel Decisions Influences\*



## Trip Profile

Mode of Transportation		
	2017	2018
	A	B
<b>Total Respondents</b>	<b>3430</b>	<b>3744</b>
Fly	76%	75%
Drive a personal vehicle	19%	21%
Drive a rental vehicle	3%	3%
Drive an RV	1%	1%
Other/No Answer (NET)	<1%	1% a

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

Frequency of Using SWFL Int'l (Past Year)		
	2017	2018
	A	B
<b>Total Respondents</b>	<b>3430</b>	<b>3744</b>
<u>One or more trips</u>	<u>62%<sup>b</sup></u>	<u>58%</u>
1 trip	39% <sup>b</sup>	32%
2 to 3 trips	17%	19% <sup>a</sup>
4 to 5 trips	4%	4%
6 or more trips	3%	3%
<u>None/No Answer</u>	<u>38%</u>	<u>42%<sup>a</sup></u>

Q3: 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		
	2017	2018
	A	B
<b>Total Respondents Who Arrived by Air</b>	<b>2606</b>	<b>2790</b>
SW Florida Int'l (Fort Myers)	82%	80%
Punta Gorda	6%	8% <sup>a</sup>
Miami Int'l	3%	3%
Tampa Int'l	2%	3%
Ft. Lauderdale Int'l	2%	2%
Orlando Int'l	2%	3%
Other/No Answer (NET)	2%	2%

Q2: At which Florida airport did you land?

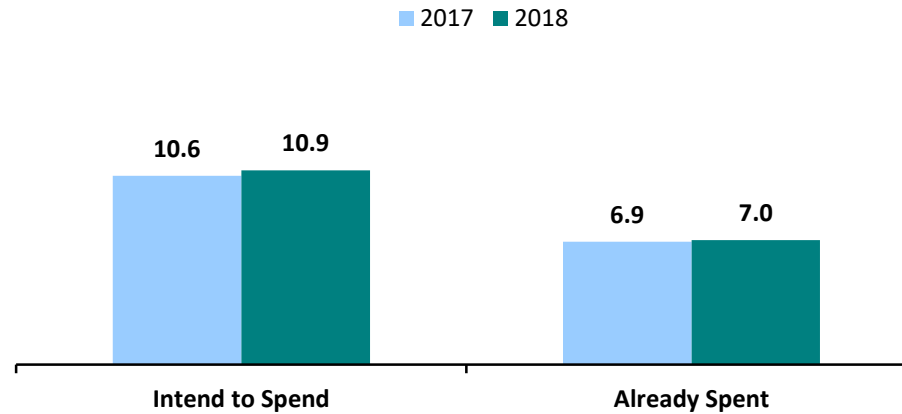
## Trip Profile

Trip Length Mean # of Nights		
	2017	2018
	A	B
<b>Total Respondents</b>	<b>3430</b>	<b>3744</b>
# of Nights Intend to Stay	10.6	10.9
# of Nights Already Spent	6.9	7.0

Q12: How many nights in total do you intend to stay in either this town or city or in the immediate surrounding area on this trip?

Q13: How many nights have you already spent in this area on this trip?

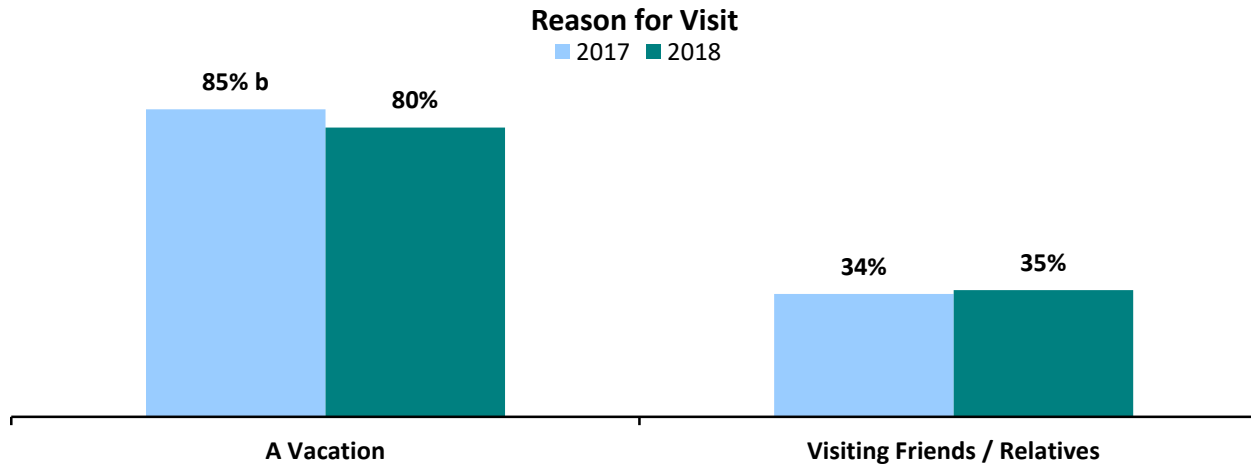
### Trip Length (mean # of days)



### Trip Profile

Reason(s) for Visit		
	2017	2018
	A	B
<b>Total Respondents</b>	<b>3430</b>	<b>3744</b>
A Vacation	85% b	80%
Visiting Friends / Relatives	34%	35%
Sporting Event(s)	2%	8% a
Personal Business	2%	2%
Other Business Trip	1%	1%
Meeting/Conference/ Convention/Trade Show	<1%	1% a
Other/No Answer (NET)	3%	4% a

Q11: 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	
	2017	2018	2017	2018	2017	2018	2017	2018
	A	B	A	B	A	B	A	B
<b>Total Respondents</b>	<b>3430</b>	<b>3744</b>	<b>112</b>	<b>209</b>	<b>2022</b>	<b>2287</b>	<b>626</b>	<b>483</b>
First-time visitor	24% a	18%	12%	14%	21%	19%	34% b	21%
Repeat visitor	74%	80% a	85%	84%	78%	79%	63%	76% a
No Answer	2%	2%	4%	1%	1%	2%	3%	3%

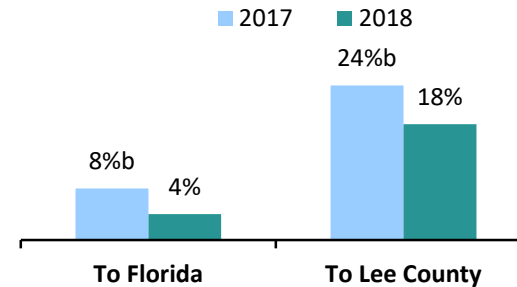
Q15: Is this your first visit to Lee County?

First Time Visitors to Florida		
	2017	2018
<b>Total Respondents</b>	<b>3430</b>	<b>3744</b>
	<b>A</b>	<b>B</b>
Yes, first-time visitor	8% b	4%
No	85%	87%a
No answer	4%	4%
<i>FL Residents*</i>	3%	6% a

Q14: Is this your first visit to Florida?

\*Florida residents are shown as a proportion of total visitor interviews conducted, though FL residents are not asked this question .

### First Time Visitors



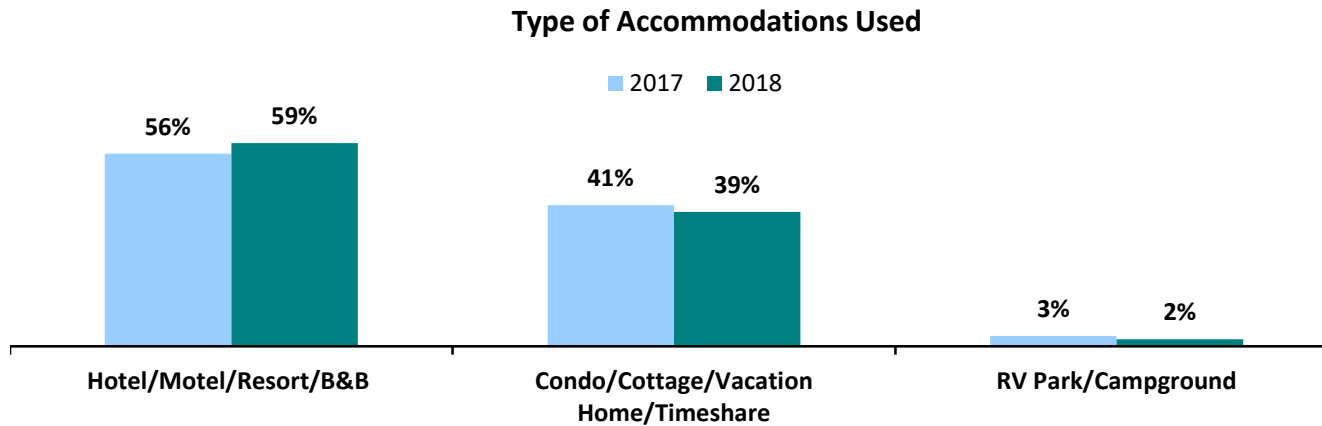
Previous Visits in Five Years		
	Mean # of Visits to Lee County	
	2017	2018
	A	B
Base: Repeat Visitors	<b>2540</b>	<b>2996</b>
Number of visits	5.4	6.2 a

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

## Trip Profile

Type of Accommodations Used		
	2017	2018
	A	B
<b>Total respondents staying in paid accommodations</b>	<b>2053</b>	<b>2333</b>
<b><u>Hotel/Motel/Resort/B&amp;B (NET)</u></b>	<b><u>56%</u></b>	<b><u>59%</u></b>
At a hotel/motel/historic inn	32%	42% a
At a resort	23% b	15%
At a Bed and Breakfast	<1%	1%
<b><u>Condo/Cottage/Vacation Home/Timeshare (NET)</u></b>	<b><u>41%</u></b>	<b><u>39%</u></b>
<b><u>RV Park/Campground (NET)</u></b>	<b><u>3%</u></b>	<b><u>2%</u></b>

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



## Trip Profile

Community Staying In		
	2017	2018
	A	B
<b>Total Respondents</b>	<b>3430</b>	<b>3744</b>
Sanibel Island	24%	23%
Fort Myers	16%	21% a
Fort Myers Beach	21% b	19%
Cape Coral	13%	13%
Bonita Springs	5%	4%
North Fort Myers	3%	3%
Estero	3%	3%
Lehigh Acres	1%	1%
Captiva Island	2%	1%
Other	<1%	<1%
Not staying overnight/ No Answer	12%	11%

Community Staying In				
	2017		2018	
Accommodations:	Paid	Unpaid	Paid	Unpaid
	A	B	C	D
<b>Total respondents</b>	<b>2053</b>	<b>1249</b>	<b>2333</b>	<b>1330</b>
Sanibel Island	34% bc	10%	31% d	9%
Fort Myers	12%	26% a	16% a	30% c
Fort Myers Beach	25% bc	15%	22% d	14%
Cape Coral	11%	17% a	12%	15% c
Bonita Springs	4%	7% a	3%	6% c
North Fort Myers	2%	5% a	2%	5% c
Estero	2%	4% a	2%	5% c
Lehigh Acres	<1%	2% a	<1%	1% c
Captiva Island	2% b	1%	2% d	1%
Other	<1%	1%	<1%	2%
Not staying overnight/ No Answer	7%	13% a	9%	13% c

Q31: In which community are you spending the most nights for your accommodations during this visit in the Fort Myers/Sanibel area? (Please mark one.)



## Trip Profile

Quality of Accommodations		
	2017	2018
	A	B
<b>Total respondents staying in paid accommodations</b>	<b>2053</b>	<b>2333</b>
Far exceeded/Exceeded expectations	38%	38%
Met your expectations	56%	56%
Did not meet/Far below expectations	3%	3%
No Answer	3%	3%

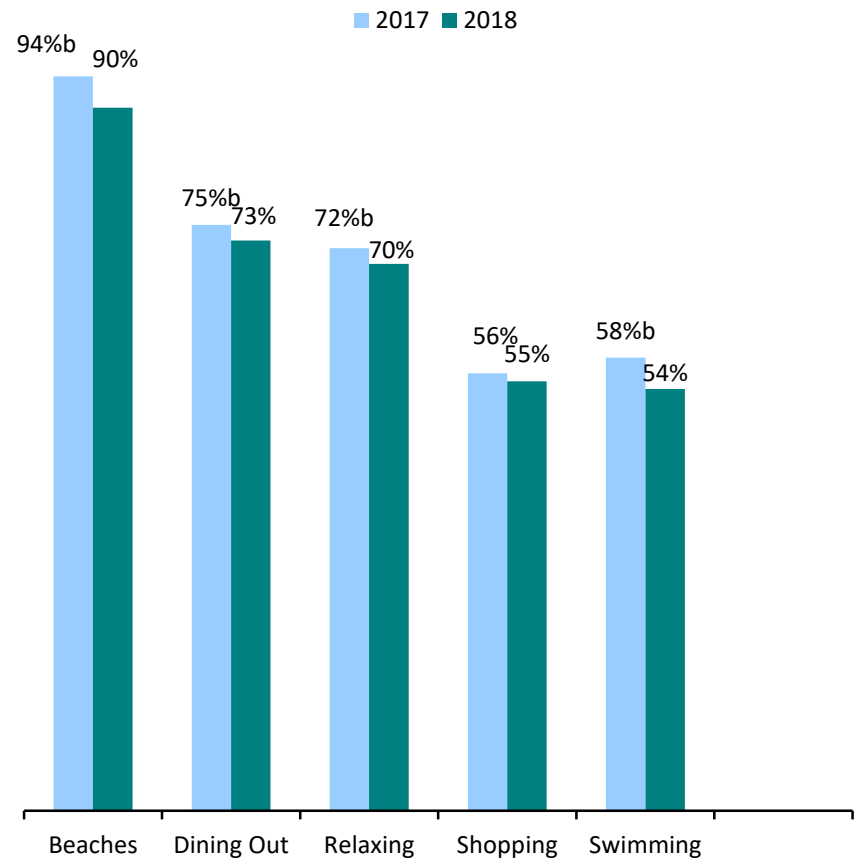
Q21: How would you describe the quality of your accommodations? Do you feel they:

Ratings by Subgroup								
	First-Timers		Repeaters		U.S. Residents		International Residents	
	2017	2018	2017	2018	2017	2018	2017	2018
	A	B	A	B	A	B	A	B
<b>Total respondents staying in paid accommodations</b>	<b>571</b>	<b>471</b>	<b>1443</b>	<b>1809</b>	<b>1587</b>	<b>1970</b>	<b>426</b>	<b>309</b>
Far exceeded/Exceeded expectations	34%	41% a	40%	37%	39%	38%	32%	38%
Met your expectations	57%	54%	56%	57%	55%	57%	61% b	53%
Did not meet/Far below expectations	3%	3%	2%	3%	3%	3%	1%	5% a
No Answer	6% b	1%	2%	3%	2%	2%	6%	5%

## Trip Activities

Activities Enjoyed		
	2017	2018
	A	B
<b>Total Respondents</b>	<b>3430</b>	<b>3744</b>
Beaches	94% b	90%
Dining Out	75% b	73%
Relaxing	72% b	70%
Shopping	56%	55%
Swimming	58% b	54%
Sightseeing	32%	35% a
Visiting Friends/Relatives	35%	35%
Shelling	35%	33%
Watching Wildlife	25%	24%
Bicycle Riding	21%	21%
Attractions	18%	21% a
Bars / Nightlife	15%	17% a
Exercise / Working Out	17%	16%
Photography	18% b	15%
Golfing	15%	14%
Boating	14%	14%
Birdwatching	13% b	11%
Fishing	12%	11%
Sporting Event	5%	10% a
Kayaking / Canoeing	10% b	8%
Miniature Golf	8%	7%
Guided Tour	5%	6%
Cultural Events	4%	5% a
Parasailing / Jet Skiing	4%	4%
Tennis	3%	3%
Scuba Diving / Snorkeling	2%	2%
Other	3%	2%
No Answer	1%	1%

### Top Activities Enjoyed

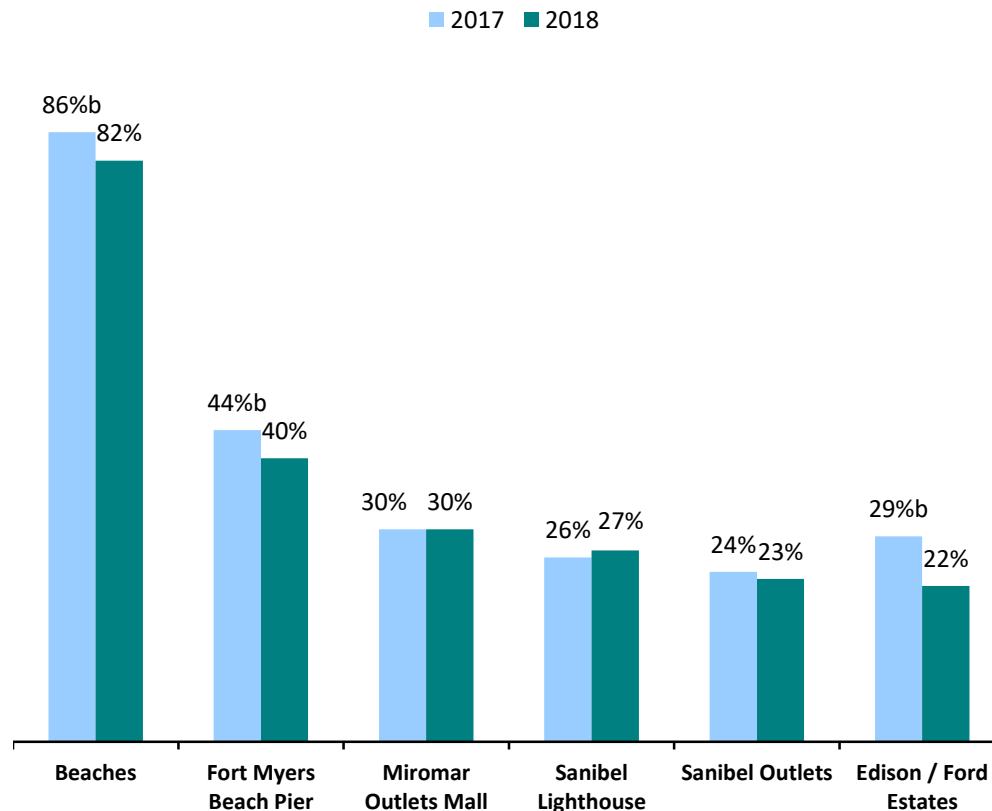


Q23: What activities or interests are you enjoying while in Lee County?  
(Please mark ALL that apply.)

## Trip Activities

Attractions Visited		
	2017	2018
	A	B
<b>Total Respondents</b>	<b>3430</b>	<b>3744</b>
Beaches	86% b	82%
Fort Myers Beach Pier	44% b	40%
Miromar Outlets Mall	30%	30%
Sanibel Lighthouse	26%	27%
Sanibel Outlets	24%	23%
Edison / Ford Estates	29% b	22%
Ding Darling National Wildlife Refuge	15%	13%
Periwinkle Place	12%	12%
Bell Tower Shops	11%	12% a
Gulf Coast Town Center	9%	10%
Coconut Point Mall	10%	9%
Shell Factory and Nature Park	9% b	7%
Manatee Park	5%	5%
Bailey-Matthews Shell Museum	4% b	2%
Broadway Palm Dinner Theater	2%	2%
Barbara B. Mann Performing Arts Hall	1%	1%
Other	5%	6%
None/No Answer (NET)	6%	7%

### Top Attractions Visited

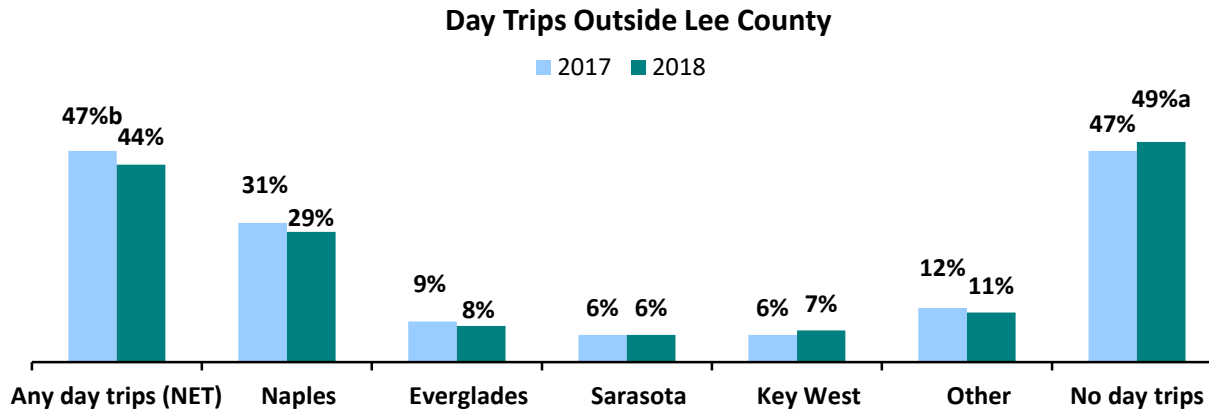


Q24: On this trip, which attractions are you visiting?  
(Please mark ALL that apply.)

### Trip Activities

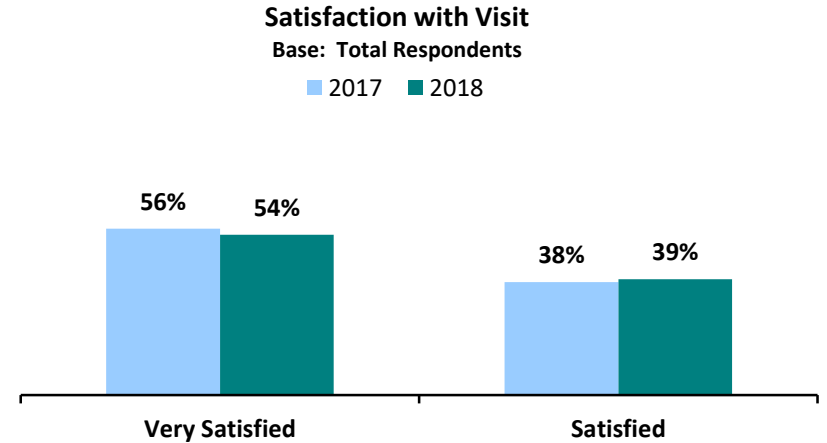
Day Trips Outside Lee County		
	2017	2018
	A	B
<b>Total Respondents</b>	<b>3430</b>	<b>3744</b>
<u>Any day trips (NET)</u>	<u>47% b</u>	<u>44%</u>
<i>Naples</i>	31%	29%
<i>Everglades</i>	9%	8%
<i>Key West</i>	6%	7%
<i>Sarasota</i>	6%	6%
<i>Other</i>	12%	11%
<u>No day trips</u>	<u>47%</u>	<u>49% a</u>
No Answer	6%	7%

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



## Lee County Experience

Satisfaction with Visit		
	Total Respondents	
	2017	2018
	A	B
<b>Total Respondents</b>	<b>3430</b>	<b>3744</b>
<u>Very Satisfied/Satisfied</u>	<u>94%</u>	<u>93%</u>
<i>Very Satisfied</i>	56%	54%
<i>Satisfied</i>	38%	39%
Neither	1%	2%
Dissatisfied/Very Dissatisfied	<1%	1%
Don't know/No answer	5%	4%

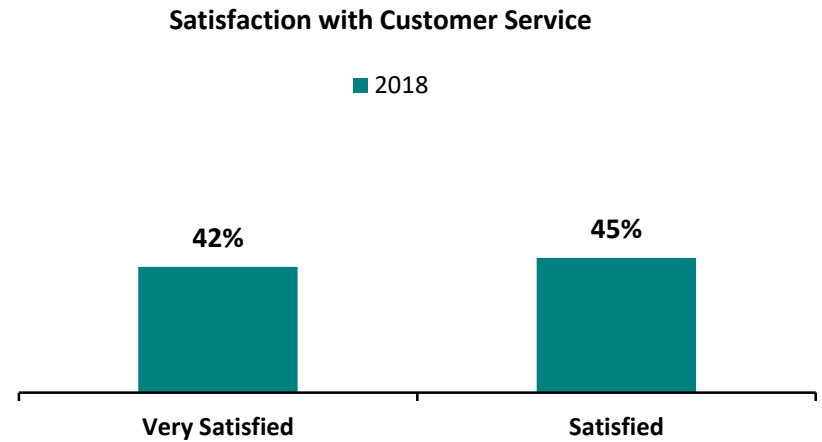


Q28: How satisfied are you with your stay in Lee County?

Ratings by Subgroup								
	First-Timers		Repeaters		U.S. Residents		International Residents	
	2017	2018	2017	2018	2017	2018	2017	2018
	A	B	A	B	A	B	A	B
<b>Total Respondents</b>	<b>826</b>	<b>660</b>	<b>2540</b>	<b>2996</b>	<b>2738</b>	<b>3163</b>	<b>626</b>	<b>483</b>
<u>Very Satisfied/Satisfied</u>	<u>91%</u>	<u>92%</u>	<u>95%</u>	<u>94%</u>	<u>94%</u>	<u>93%</u>	<u>93%</u>	<u>95%</u>
<i>Very Satisfied</i>	39%	48% a	62% b	55%	59% b	54%	45%	57% a
<i>Satisfied</i>	52% b	44%	33%	38% a	35%	39% a	48% b	38%

## Lee County Experience

Satisfaction with Customer Service*	
	2018
<b>Total Respondents</b>	<b>3744</b>
<u>Very Satisfied/Satisfied</u>	<u>87%</u>
<i>Very Satisfied</i>	42%
<i>Satisfied</i>	45%
Neither	4%
Dissatisfied/Very Dissatisfied	<1%
Don't know/no answer	9%



Q29: How satisfied are you with the customer service you received while visiting Lee County?

*\*This question was added in January 2018, so prior year (2017) data is not available.*

Ratings by Subgroup				
2018	First-Timers	Repeaters	U.S. Residents	International Residents
<b>Total Respondents</b>	<b>660</b>	<b>2996</b>	<b>3163</b>	<b>483</b>
<u>Very Satisfied/Satisfied</u>	<u>86%</u>	<u>87%</u>	<u>87%</u>	<u>87%</u>
<i>Very Satisfied</i>	43%	42%	42%	42%
<i>Satisfied</i>	43%	46%	45%	44%

## Future Plans

Likelihood to Recommend/Return to Lee County		
	2017	2018
	A	B
<b>Total Respondents</b>	<b>3430</b>	<b>3744</b>
Likely to Recommend Lee County	88%	87%
Likely to Return to Lee County	90% b	88%
<b>Base: Total Respondents Planning to Return</b>	<b>3093</b>	<b>3311</b>
Likely to Return Next Year	60% b	52%

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

Q32: Will you come back to Lee County?

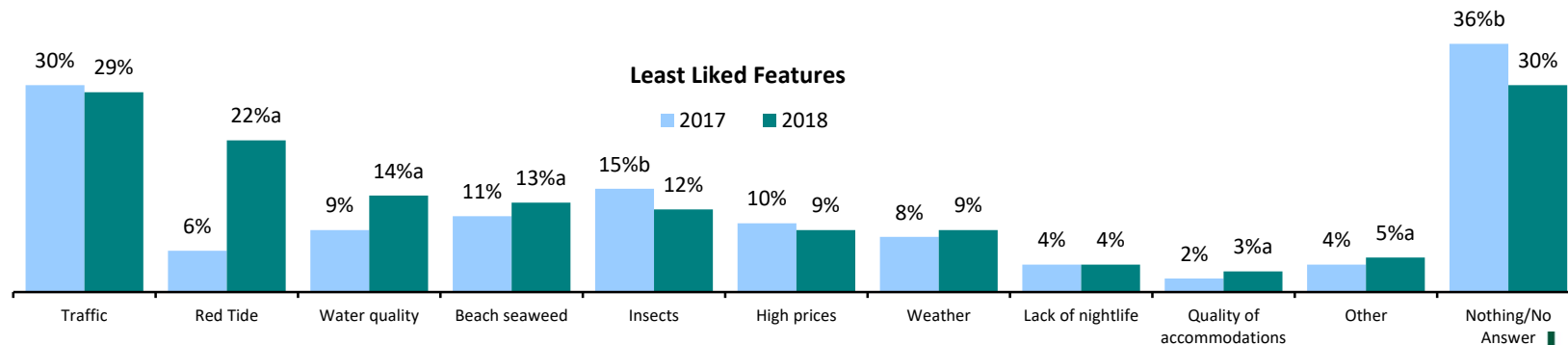
Q32\_1: Will you come back next year?

Ratings by Subgroup								
	First-Timers		Repeaters		U.S. Residents		International Residents	
	2017	2018	2017	2018	2017	2018	2017	2018
	A	B	A	B	A	B	A	B
<b>Total Respondents</b>	<b>826</b>	<b>660</b>	<b>2540</b>	<b>2996</b>	<b>2738</b>	<b>3163</b>	<b>626</b>	<b>483</b>
Likely to Recommend Lee County	82%	82%	90% b	88%	88%	87%	91%	91%
Likely to Return to Lee County	78%	78%	94% b	91%	91% b	89%	88%	85%
<b>Base: Total Respondents Planning to Return</b>	<b>647</b>	<b>513</b>	<b>2389</b>	<b>2724</b>	<b>2492</b>	<b>2831</b>	<b>551</b>	<b>412</b>
Likely to Return Next Year	30%	34%	68% b	56%	62% b	53%	53%	52%

## Lee County Experience

Least Liked Features		
	2017	2018
	A	B
<b>Total Respondents</b>	<b>3430</b>	<b>3744</b>
Traffic	30%	29%
Red Tide	6%	22% a
Water quality	9%	14% a
Beach seaweed	11%	13% a
Insects	15% b	12%
High prices	10%	9%
Weather	8%	9%
Lack of nightlife	4%	4%
Quality of accommodations	2%	3% a
Other	4%	5% a
Nothing/No Answer	36% b	30%

Q30: During this specific visit, which features have you liked **LEAST** about our area?  
(Please mark ALL that apply.)



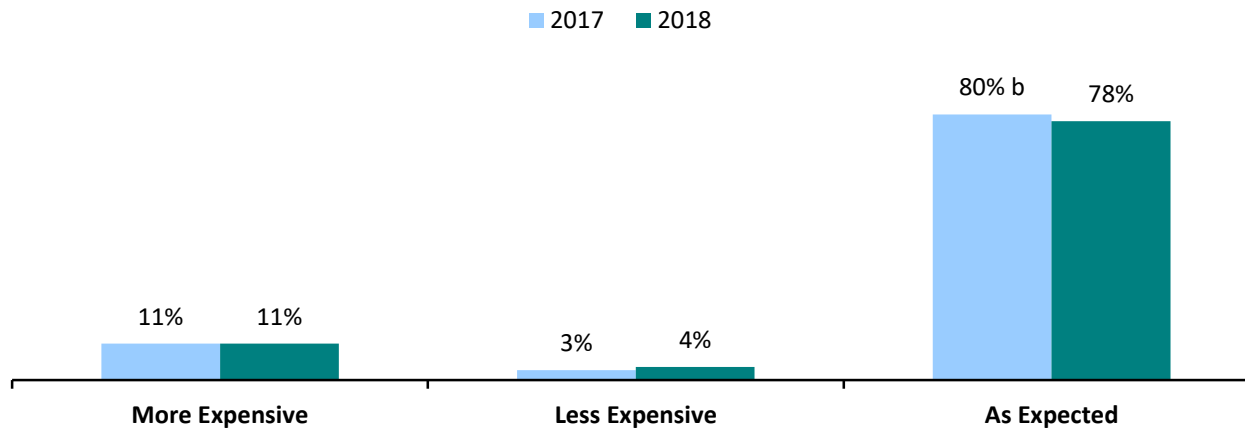


## Lee County Experience

Perception of Lee County as Expensive		
	2017	2018
	A	B
<b>Total Respondents</b>	<b>3430</b>	<b>3744</b>
More Expensive	11%	11%
Less Expensive	3%	4%
As Expected	80% b	78%
Don't know/No Answer (NET)	6%	7%

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

### Perception of Lee County as Expensive



## Visitor and Travel Party Demographic Profile

Visitor Demographic Profile		
	2017	2018
	A	B
<b>Total Respondents</b>	<b>3430</b>	<b>3744</b>
Age of respondent (mean)	51.9	52.5
Annual household income (mean)	\$102,400	\$105,800 a
Martial Status		
Married	72%	75% a
Single	13%	12%

Q35: What is your age, please?

Q37: What is your total annual household income before taxes?

Q34: Are you: Married/Single/Other

Travel Party		
	2017	2018
	A	B
<b>Total Respondents</b>	<b>3430</b>	<b>3744</b>
Couple	40%	41%
Family	34%	36%
Single	8%	8%
Group of couples/friends	13% b	10%
Mean travel party size	3.1	3.2 a
Mean adults in travel party	2.6	3.1 a

Q17: On this trip, are you traveling:

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

Travel Parties with Children		
	2017	2018
	A	B
<b>Total Respondents</b>	<b>3430</b>	<b>3744</b>
<u>Traveling with any Children (net)</u>	<u>23%</u>	<u>29% a</u>
Any younger than 6	10%	11%
Any ages 6-11	10%	12% a
Any 12-17 years old	11%	16% a
<u>No Children</u>	<u>77% b</u>	<u>68%</u>

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		
	2017	2018	2017	2018	% Change
Paid Accommodations	63%	63%	3,027,400	3,038,997	0.4%
Friends/Relatives	37%	37%	1,769,994	1,754,853	-0.9%
<b>Total Visitation</b>			<b>4,797,394</b>	<b>4,793,850</b>	<b>-0.1%</b>

Paid Accommodations Visitors					
	%		Visitor Estimates		Direction of Change
Country of Origin	2017	2018	2017	2018	
United States	79%	86%	2,387,914	2,626,952	+
Germany	6%	4%	189,589	136,015	-
Canada	8%	4%	252,785	114,679	-
UK	3%	2%	81,252	49,339	-
Other International	4%	4%	115,860	112,012	-

U.S. Region of Origin	2017	2018	2017	2018	Direction of Change
Florida	7%	11%	166,960	289,381	+
South (including Florida)	24%	30%	564,946	786,699	+
Midwest	47%	43%	1,120,184	1,124,599	+
Northeast	25%	23%	597,949	608,219	+
West	4%	4%	104,835	107,435	+

2018 Top DMAs (Paid Accommodations)			
New York	5.9%	154,221	1
Chicago	5.2%	136,893	2
Boston (Manchester, NH)	4.8%	126,496	3
Minneapolis-Saint Paul	4.4%	114,366	4
Tampa-St. Petersburg	3.8%	98,771	5
Miami-Fort Lauderdale	3.5%	91,839	6
Indianapolis	3.4%	90,107	7
Philadelphia	3.4%	90,107	8
Cincinnati	3.3%	86,641	9
Detroit	3.1%	81,442	10

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

## Occupancy Data Analysis 2018

*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 2017	April 2018
2	April	May	June	July 2017	July 2018
3	July	August	September	October 2017	October 2018
4	October	November	December	January 2018	January 2019

## Occupancy/Daily Rates

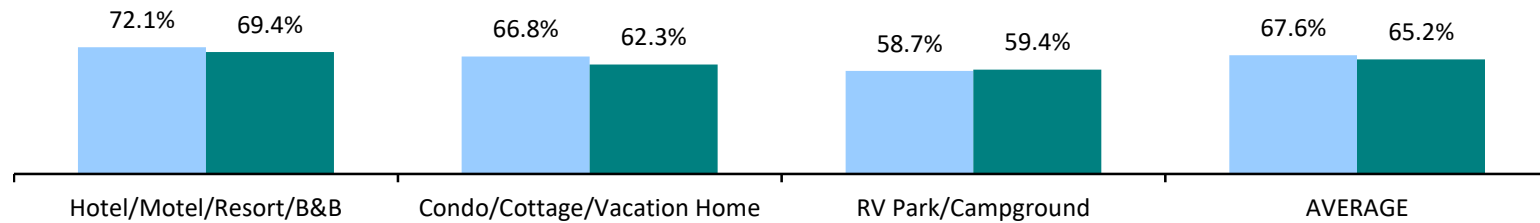
	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2017	2018	% Change	2017	2018	% Change	2017	2018	% Change
Hotel/Motel/Resort/B&B	72.1%	69.4%	-3.8%	\$157.96	\$159.16	0.8%	\$113.93	\$110.45	-3.1%
Condo/Cottage/Vacation Home	66.8%	62.3%	-6.8%	\$213.71	\$208.47	-2.4%	\$142.84	\$129.82	-9.1%
RV Park/Campground	58.7%	59.4%	1.2%	\$56.11	\$54.64	-2.6%	\$32.94	\$32.47	-1.4%
<b>AVERAGE</b>	<b>67.6%</b>	<b>65.2%</b>	<b>-3.6%</b>	<b>\$146.07</b>	<b>\$142.07</b>	<b>-2.7%</b>	<b>\$98.69</b>	<b>\$92.55</b>	<b>-6.2%</b>

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]?

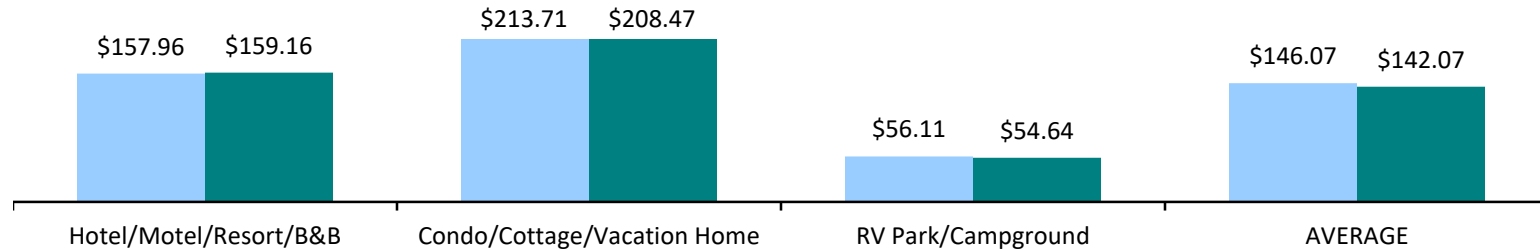
### Average Occupancy Rate

■ 2017 ■ 2018



### Average Daily Rate

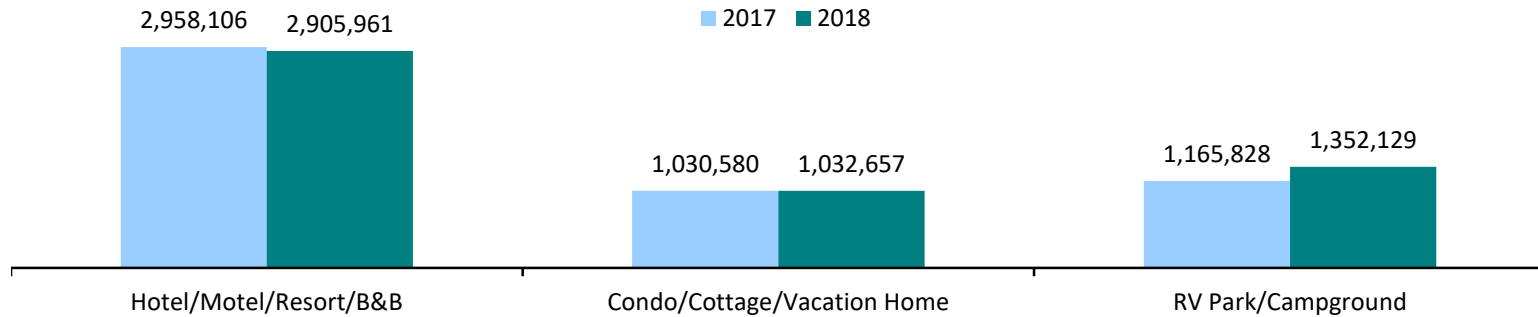
■ 2017 ■ 2018



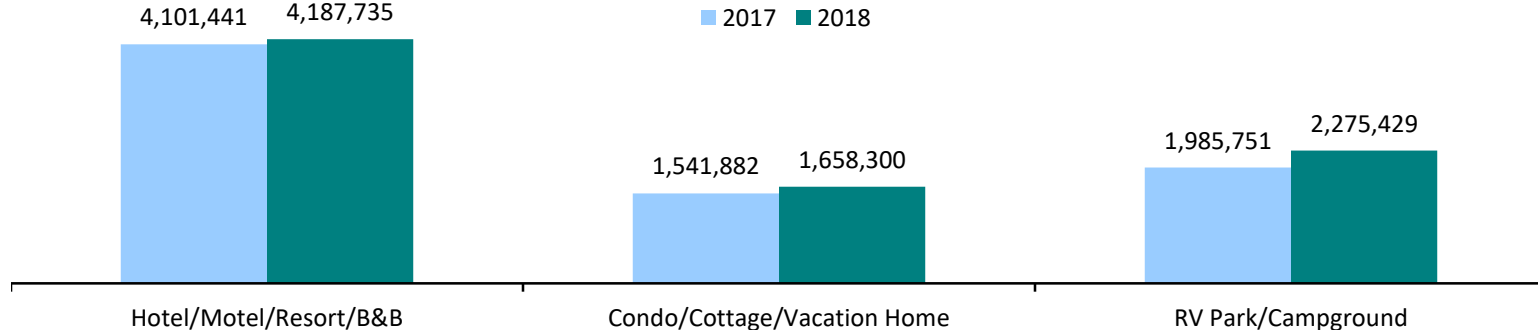
### Room/Unit/Site Nights

	Occupied Room Nights			Available Room Nights		
	2017	2018	% Change	2017	2018	% Change
Hotel/Motel/Resort/B&B	2,958,106	2,905,961	-1.8%	4,101,441	4,187,735	2.1%
Condo/Cottage/Vacation Home	1,030,580	1,032,657	0.2%	1,541,882	1,658,300	7.6%
RV Park/Campground	1,165,828	1,352,129	16.0%	1,985,751	2,275,429	14.6%
<b>Total</b>	<b>5,154,514</b>	<b>5,290,747</b>	<b>2.6%</b>	<b>7,629,074</b>	<b>8,121,464</b>	<b>6.5%</b>

#### Occupied Room Nights



#### Available Room Nights



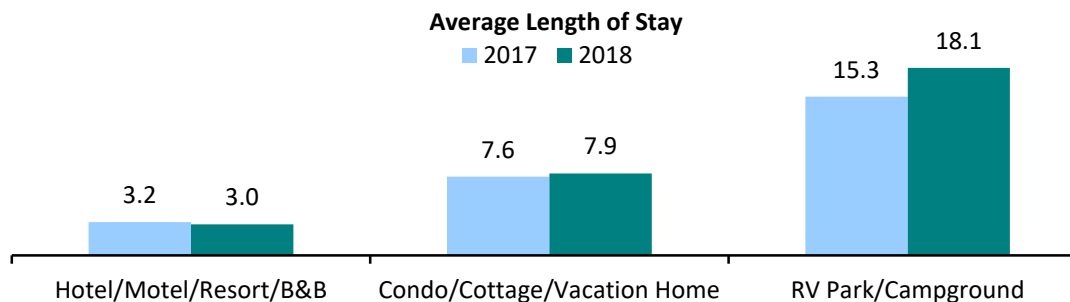
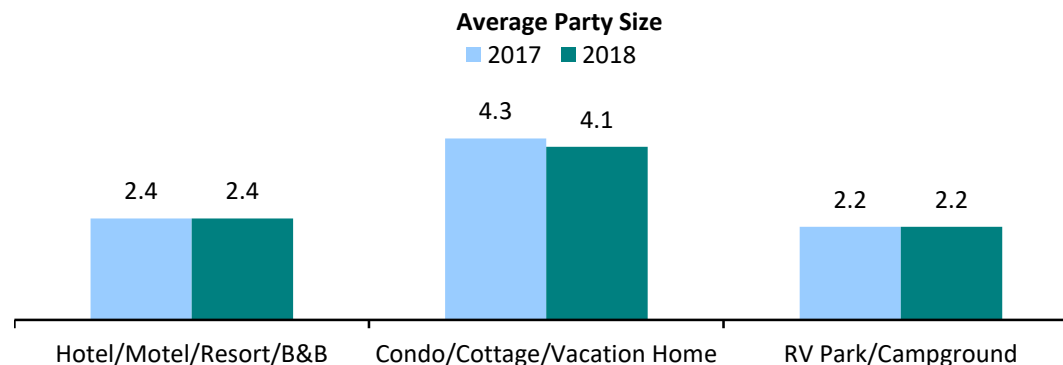
### Average Party Size and Length of Stay

	Average Party Size			Average Length of Stay		
	2017	2018	% Change	2017	2018	% Change
Hotel/Motel/Resort/B&B	2.4	2.4	-1.3%	3.2	3.0	-5.8%
Condo/Cottage/Vacation Home	4.3	4.1	-5.8%	7.6	7.9	3.6%
RV Park/Campground	2.2	2.2	+1.2%	15.3	18.1	18.5%
<b>Average</b>	<b>2.8</b>	<b>2.7</b>	<b>-2.8%</b>	<b>4.7</b>	<b>4.7</b>	<b>-0.6%</b>

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]?

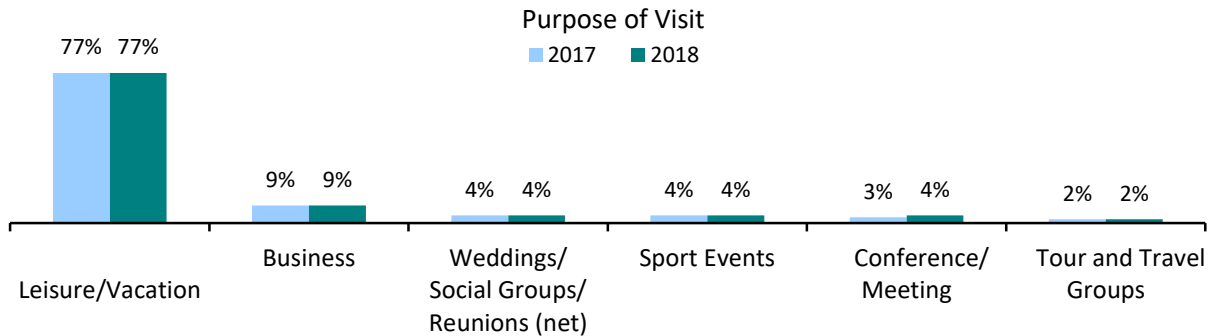
**Note:** Year-over-year percent change is calculated using unrounded figures for estimated average party size and length of stay.



## Lodging Management Estimates

Guest Profile		
	2017	2018
	A	B
<b>Property Managers Responding</b>	<b>403</b>	<b>476</b>
<u>Purpose of Visit</u>		
Leisure/Vacation	77%	77%
Business	9%	9%
Weddings/Social Groups/Reunions (net)	4%	4%
Sport Events	4%	4%
Conference/Meeting	3%	4%
Tour and Travel Groups	2%	2%

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:





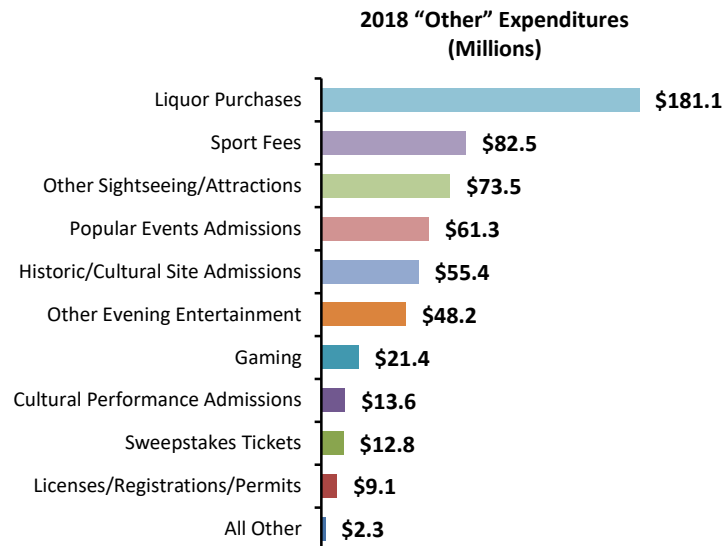
## **Economic Impact Analysis**

### **2018**

## Total Visitor Expenditures by Spending Category

TOTAL EXPENDITURES			
	2017	2018	% Change
<u>TOTAL</u>	<u>\$3,085,172,003</u>	<u>\$3,116,791,419</u>	<u>1.0%</u>
Food and Beverages	\$777,713,327	\$796,717,213	2.4%
Shopping	\$747,350,463	\$738,282,897	-1.2%
Lodging Accommodations	\$752,914,551	\$751,679,241	-0.2%
Ground Transportation	\$267,688,944	\$269,030,291	0.5%
Other	\$539,504,718	\$561,081,777	4.0%

(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 in Paid Accommodations			Visiting Friends and Relatives/Day Trippers		
	2017	2018	% Change	2017	2018	% Change
<b>TOTAL</b>	<u>\$2,222,342,586</u>	<u>\$2,239,802,711</u>	<u>0.8%</u>	<u>\$862,829,417</u>	<u>\$876,988,708</u>	<u>1.6%</u>
Lodging Accommodations	\$752,914,551	\$751,679,241	-0.2%	\$0	\$0	--
Food and Beverages	\$487,533,125	\$496,683,109	1.9%	\$290,180,202	\$300,034,104	3.4%
Shopping	\$468,035,700	\$463,856,568	-0.9%	\$279,314,763	\$274,426,329	-1.8%
Ground Transportation	\$179,879,657	\$179,886,982	0.0%	\$87,809,287	\$89,143,309	1.5%
Other	\$333,979,553	\$347,696,811	4.1%	\$205,525,165	\$213,384,966	3.8%

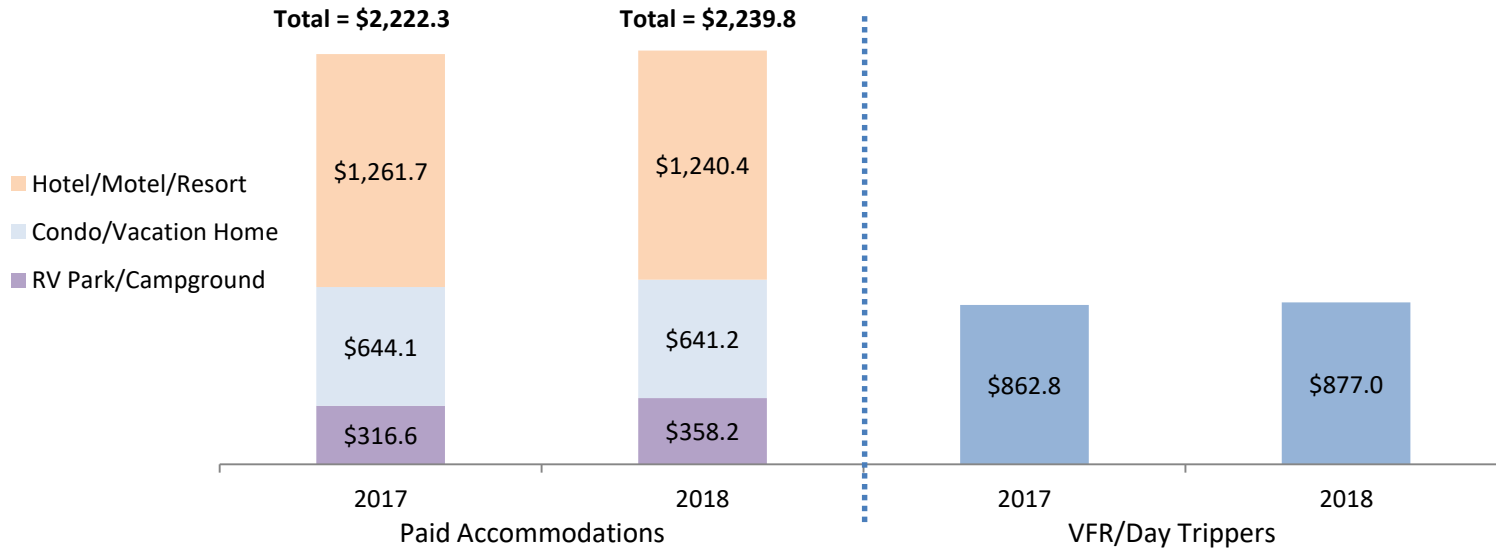
“Other ” includes the following categories:

- 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					
	2017	2018	% Change	2017	2018
<u>TOTAL</u>	<u>\$3,085,172,003</u>	<u>\$3,116,791,419</u>	<u>1.0%</u>	<u>100%</u>	<u>100%</u>
Visiting Friends & Relatives/Day Trippers	\$862,829,417	\$876,988,708	1.6%	28%	28%
<u>Paid Accommodations</u>	<u>\$2,222,342,586</u>	<u>\$2,239,802,711</u>	<u>0.8%</u>	<u>72%</u>	<u>72%</u>
<i>Hotel/Motel/Resort/B&amp;B</i>	\$1,261,655,436	\$1,240,407,913	-1.7%	41%	40%
<i>Condo/Cottage/Vacation Home</i>	\$644,113,940	\$641,235,310	-0.4%	21%	21%
<i>RV Park/Campground</i>	\$316,573,210	\$358,159,488	13.1%	10%	11%

Expenditures by Lodging Type  
(Millions)



## Direct and Indirect Impact of Visitor Expenditures

Estimated total visitor expenditures (detailed in 16 expense categories) are entered into an input/output model designed specifically for Lee County. This model classifies the visitor expenditure dollars by industry and identifies how the dollars move through the County economy. This Regional Input-Output Model is based on an economic model designed by the Federal Government, but it is modified using County Business Patterns to reflect how the economy of Lee County actually works.

*In the text and figures which follow to describe the impact of visitor expenditures on Lee County, both direct and total impacts are mentioned.*

### DIRECT IMPACTS

Economic benefits due directly to visitor expenditures.

For example, when visitor expenditures pay the salary and benefits for a hotel desk clerk, that amount would be considered in the direct impact for both jobs and income.

### TOTAL IMPACTS

Total impacts are the sum of direct and indirect impacts.

Indirect impacts are the additional economic benefits supported during additional rounds of spending.

For example, the front desk clerk pays income tax and property tax which are an indirect result of visitor expenditures. The front desk clerk also pays his/her utility bills, buys food for his/her family, shops for gifts, etc. Those dollars create the indirect impact of the initial traveler expenditures through many additional rounds of spending in the economy.

## Impact on Jobs for Lee County Residents

In order to produce the output (food, lodging, entertainment, etc.) purchased by visitors, businesses have to employ people.

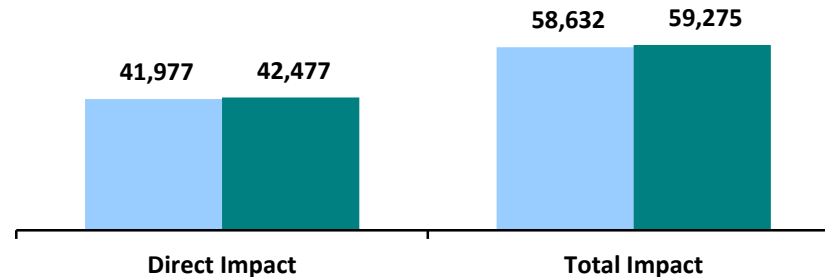
The number of jobs necessary to produce what is purchased with visitor expenditures is the employment impact of the visitor expenditures.

Direct employment includes the number of employees necessary to produce the direct output purchased with the visitor expenditures.

Total employment includes the number of employees necessary to produce the direct output purchased with the visitor expenditures PLUS the employees necessary to produce additional output purchased with the recirculation of money in Lee County. For example, wages paid to a hotel desk clerk are then used to purchase food and services for that employee, leading to additional supported jobs (grocery store proprietor, auto mechanic, etc.).

**Resident Employment Impact**

■ 2017 ■ 2018



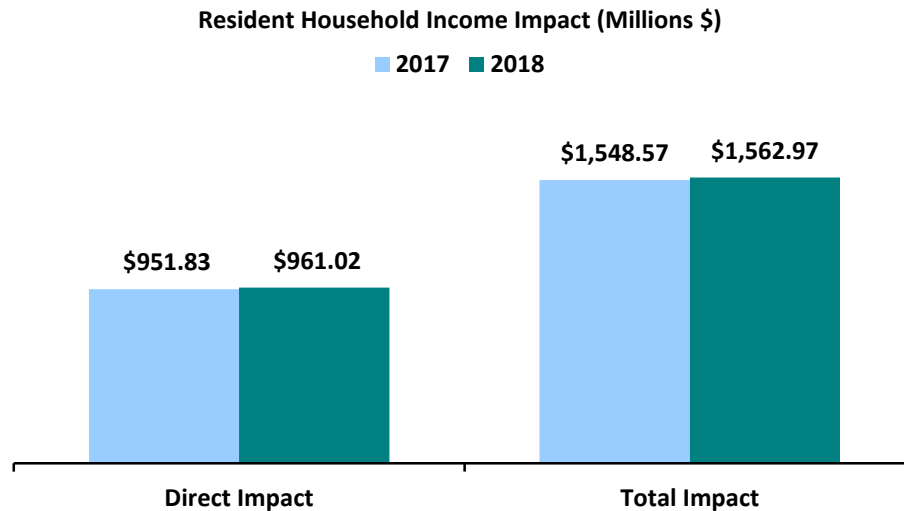
## Impact on Household Income for Lee County Residents

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

The wages and salaries paid in order to produce what is purchased with visitor expenditures is the household income impact of the visitor expenditures.

Direct household income impact includes the direct wages and salaries paid in order to produce the goods and services purchased with the visitor expenditures.

Total household income includes the wages and salaries paid in order to produce the goods and services purchased with the visitor expenditures PLUS the wages and salaries necessary to produce the additional output purchased with the recirculation of money in Lee County. For example, wages brought home by a hotel desk clerk are then used to purchase food and services for that person and his/her family, leading to additional wages and salaries being paid to others (grocery store employee, utility crews, etc.).



## Impact on State and Local Government Revenues

In producing and selling any goods and services purchased by visitors, both local and state revenues are collected by local and state governments.

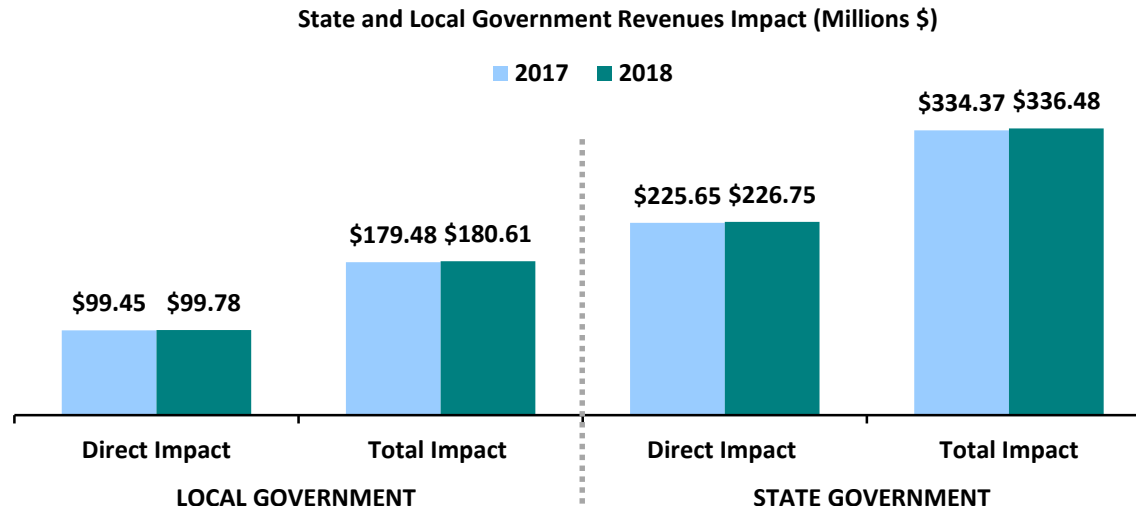
The gross government revenues accruing to governments as a result of producing the output purchased with visitor expenditures is the government revenue impact.

Local government revenue impact is a result of revenues provided to the local (Lee County) government. This includes the bed tax, local property tax, any local-option sales tax, and any operating income for local government agencies.

State government revenue impact is a result of revenues provided to the Florida state government. This includes sales tax and any operating income for state government agencies.

The following are included in government revenues as appropriate for the local area; gasoline taxes, vehicle licenses and registrations, boat registrations, hunting and fishing licenses, liquor taxes, local and state park user fees, etc.

Tax ratios used to calculate these government revenue impacts are adjusted to conform to data reported in State and Local Government Finance Data (SLGF, Bureau of the Census).





## Appendix 2018

## 2018 Interviewing Locations

City	Event/Location
Bonita Springs	Bonita Beach Park
Cape Coral	Cape Coral Yacht Club
Estero	Miromar Outlets
Fort Myers Beach	Bel-Air
Fort Myers Beach	Best Western PLUS Beach Resort
Fort Myers Beach	Cane Palm Beach Condos
Fort Myers Beach	Casa Playa
Fort Myers Beach	DiamondHead Resort
Fort Myers Beach	Estero Island Beach Club
Fort Myers Beach	Neptune Inn
Fort Myers Beach	The Pier
Fort Myers Beach	Times Square
Fort Myers Beach	Sunset Celebration
Fort Myers Beach	Windward Passage
Fort Myers	Hammond Stadium - Twins Game
Fort Myers	Jet Blue Park - Red Sox Game

City	Event/Location
Fort Myers	Centennial Park
Fort Myers	Edison-Ford Winter Estates
Fort Myers	RSW Airport
Sanibel	Casa Ybel
Sanibel	Coquina Beach Club
Sanibel	Holiday Inn Sanibel Island
Sanibel	Lighthouse Beach
Sanibel	Loggerhead Cay
Sanibel	Compass Point
Sanibel	Pelican Roost
Sanibel	Pointe Santo
Sanibel	Sanibel Arms West
Sanibel	Sanibel Inn
Sanibel	Sanibel Moorings
Sanibel	Sanibel Surfside
Sanibel	Song of the Sea
Sanibel	Tortuga Beach Resort

**Seasonal Comparisons:  
Key Statistics  
2018**

	Winter 2018		Direction of Change	Spring 2018		Direction of Change	Summer 2018		Direction of Change	Fall 2018		Direction of Change
<b>Visitation</b>												
Total Visitation		<b>1,367,085</b>	+		<b>1,345,197</b>	+		<b>981,760</b>	-		<b>1,099,808</b>	-
Paid Accommodations		789,270	+		865,503	+		638,485	-		745,739	-
Visiting Friends/Relatives		577,815	-		479,694	+		343,275	-		354,069	+
<b>Visitor Origin by Country</b>												
United States	90%	708,080	+	84%	728,439	+	85%	545,159	+	85%	633,617	+
Canada	7%	58,563	-	3%	29,261	-	1%	6,829	-	4%	29,986	-
Germany	1%	10,648	-	7%	60,062	-	6%	36,420	-	4%	31,290	-
United Kingdom	<1%	2,662	-	2%	16,940	-	3%	18,210	+	2%	13,037	-
Other International	1%	9,317	-	5%	30,800	-	5%	31,867	-	6%	37,808	+
<b>Visitor Origin by US Region</b>												
Midwest	57%	404,877	+	39%	282,456	-	32%	175,121	-	42%	267,939	-
Northeast	26%	187,006	+	25%	182,110	+	19%	103,550	+	22%	138,183	-
South (incl. Florida)	14%	101,673	+	31%	228,566	+	46%	248,215	+	30%	188,737	+
West	2%	14,525	-	5%	35,307	+	3%	18,273	-	6%	38,759	+
<b>In-State Visitors</b>	<b>1%</b>	<b>3,631</b>	-	<b>11%</b>	<b>78,047</b>	+	<b>23%</b>	<b>127,914</b>	+	<b>10%</b>	<b>65,721</b>	+
<b>Total Visitor Expenditures</b>		<b>\$1,191,982,054</b>	+		<b>\$755,450,385</b>	+		<b>\$485,177,616</b>	-		<b>\$684,181,364</b>	-
Paid Accommodations		\$888,094,155	+		\$526,702,281	+		\$324,384,705	-		\$500,621,570	-
Visiting Friends/Relatives		\$303,887,899	+		\$228,748,104	+		\$160,792,911	+		\$183,559,794	+

Visitor Profile Survey	Winter 2018	Spring 2018	Summer 2018	Fall 2018
# of Interviews Completed	958	968	872	946
Percentage Flying to Lee County	72%	77%	72%	77%
First-time Visitors	15%	19%	19%	17%
Repeat Visitors	82%	79%	79%	80%
Average Length of Stay	6.4	4.0	3.7	4.4
Satisfaction with Visit				
<u>Very Satisfied/Satisfied</u>	<u>96%</u>	<u>95%</u>	<u>89%</u>	<u>94%</u>
<i>Very Satisfied</i>	56%	58%	46%	55%
<i>Satisfied</i>	40%	36%	43%	39%
Likely to Recommend	91%	91%	82%	87%
Likely to Return	94%	90%	86%	92%
Average Age	56.9	51.4	49.0	52.6
Average Household Income	\$105,200	\$105,300	\$105,050	\$107,800
Married	76%	75%	72%	75%
Traveling as a couple	49%	37%	35%	42%
Traveling as a family	28%	38%	43%	37%
Traveling with children	24%	32%	35%	26%
Average Travel Party Size	3.0	3.5	3.4	3.0

Occupancy Survey	Winter 2018	YOY % Change	Spring 2018	YOY % Change	Summer 2018	YOY % Change	Fall 2018	YOY % Change
<b>Available Roomnights</b>								
Hotel/Motel/Resort/B&B	1,042,867	2.3%	1,046,611	3.0%	1,060,395	4.4%	1,037,862	-1.1%
Condo/Cottage/Vacation Home	435,330	12.9%	385,972	0.4%	396,416	9.6%	440,582	7.4%
RV Park/Campground	549,360	6.7%	530,897	6.6%	575,368	30.6%	619,804	16.4%
<b>Total</b>	<b>2,027,557</b>	<b>5.6%</b>	<b>1,963,480</b>	<b>3.4%</b>	<b>2,032,179</b>	<b>11.8%</b>	<b>2,098,248</b>	<b>5.3%</b>
<b>Occupied Roomnights</b>								
Hotel/Motel/Resort/B&B	909,028	8.2%	747,265	4.8%	580,805	-7.9%	668,863	-13.6%
Condo/Cottage/Vacation Home	364,717	4.3%	273,161	-0.7%	179,399	7.2%	215,380	-9.8%
RV Park/Campground	526,826	7.7%	266,612	45.5%	146,946	8.8%	411,745	14.9%
<b>Total</b>	<b>1,800,571</b>	<b>7.3%</b>	<b>1,287,038</b>	<b>9.9%</b>	<b>907,150</b>	<b>-2.8%</b>	<b>1,295,988</b>	<b>-5.5%</b>
<b>Occupancy Rates</b>								
Hotel/Motel/Resort/B&B	87.2%	5.8%	71.4%	1.7%	54.8%	-11.8%	64.5%	-12.6%
Condo/Cottage/Vacation Home	83.8%	-7.6%	70.8%	-1.0%	45.3%	-1.9%	48.9%	-16.0%
RV Park/Campground	95.9%	0.9%	50.2%	36.4%	25.5%	-16.9%	66.4%	-1.3%
<b>Average</b>	<b>88.8%</b>	<b>1.6%</b>	<b>65.5%</b>	<b>6.2%</b>	<b>44.6%</b>	<b>-13.1%</b>	<b>61.8%</b>	<b>-10.2%</b>
<b>Average Daily Rates</b>								
Hotel/Motel/Resort/B&B	\$211.86	4.1%	\$148.11	-4.5%	\$119.44	-3.3%	\$134.38	-3.5%
Condo/Cottage/Vacation Home	\$236.16	-10.5%	\$197.98	-3.3%	\$166.74	-5.8%	\$209.65	19.0%
RV Park/Campground	\$59.91	-9.5%	\$49.46	6.0%	\$44.18	5.7%	\$54.98	4.5%
<b>Average</b>	<b>\$172.32</b>	<b>-2.1%</b>	<b>\$138.26</b>	<b>-7.7%</b>	<b>\$116.60</b>	<b>-3.9%</b>	<b>\$121.66</b>	<b>-1.1%</b>
<b>RevPAR</b>								
Hotel/Motel/Resort/B7B	\$184.67	10.2%	\$105.75	-2.8%	\$65.42	-14.8%	\$86.60	-15.7%
Condo/Cottage/Vacation Home	\$197.86	-17.4%	\$140.41	-4.3%	\$75.46	-7.8%	\$102.49	-0.1%
RV Park/Campground	\$57.45	-8.6%	\$24.84	44.7%	\$11.28	-11.9%	\$36.52	3.2%
<b>Average</b>	<b>\$153.03</b>	<b>-0.6%</b>	<b>\$90.63</b>	<b>-1.9%</b>	<b>\$52.05</b>	<b>-16.4%</b>	<b>\$75.14</b>	<b>-11.3%</b>

Occupancy Barometer	Winter 2018	Spring 2018	Summer 2018	Fall 2018
<b>Purpose of Visit</b>				
Leisure/Vacation	86%	72%	72%	76%
Business	12%	12%	12%	9%
Weddings/Social groups/Reunions (net)	3%	6%	4%	4%
Conference/meeting	2%	3%	6%	4%
Tour and Travel Groups	1%	2%	2%	3%
Sport Events	3%	5%	3%	4%
<b>Level of Reservations for Next Three Months vs. Last Year</b>				
Up/Same (Net)	<u>71%</u>	<u>67%</u>	<u>34%</u>	<u>53%</u>
Up	32%	34%	17%	31%
Same	39%	33%	17%	22%
Down	16%	25%	62%	37%