# 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*

## Summer 2014 Visitor Profile and Occupancy Analysis

## November 13, 2014

**Prepared for:**

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

**Prepared by:**

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## dpa
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**Executive Summary**

**Summer 2014**

**(July, August, and September)**

*Throughout this report, statistically significant differences between responses*
*for 2013 and 2014 at the 95% confidence level are noted with an A,B lettering system.*
*For example:*

| 2013 A | 2014 B |
|--------|--------|
| 70%    | 80%A   |

*In the table above  80% in Column B is statistically greater than 70% in Column A.*

# Executive Summary

## Visitation Estimates

- The summer 2014 brought approximately 693,000 paid accommodation visitors to Lee County.  An additional 404,000 visitors stayed with friends or relatives for an estimated total of 1.1 million visitors.

- Summer 2014 visitation among paid accommodations guests was up significantly from 2013. However, visitors staying with friends or relatives was down by 5.6%.  The net result was a modest increase in total visitation from the prior year.

| Estimated Visitation | Summer 2013 | Summer  2014 | % Change |
|---|---|---|---|
| Paid Accommodations | 624,158 | 693,277 | 11.1% |
| Friends/Relatives | 428,409 | 404,232 | -5.6% |
| **Total Visitation** | **1,052,567** | **1,097,509** | **4.3%** |

## Visitor Expenditures

- Summer 2014 visitors spent an estimated $479 million during their stay in Lee County, a 2% increase from last summer ($470  million).

- Expenditures among summer 2014 paid accommodations guests amounted to $308.9 million (65% of the total), providing an increase of 3.5% year-over-year.  Those staying with friends or relatives contributed the remaining $170.2 million – a  very slight decline from the previous year.

| Estimated Expenditures | Summer  2013 | Summer  2014 | % Change |
|---|---|---|---|
| Paid Accommodations | $298,563,087 | $308,889,274 | 3.5% |
| Friends/Relatives | $171,303,936 | $170,156,393 | -0.7% |
| **Total Expenditures** | **$469,867,023** | **$479,045,667** | **2.0%** |

*Note:  Summer season refers to the period including July, August, and  September when referenced throughout this report.*

## Visitor Origin

- Comparable to last year, seven in ten summer 2014 visitors staying in paid accommodations are from the United States (69%). The majority of international visitors staying in paid accommodations came from Germany (12%), followed by the UK (7%) and Canada (5%).

- About equal numbers of domestic paid accommodations guests came from the Midwest (36%) and the South (33%) regions.  Almost as many arrived from the Northeast (29%), but only a small minority of guests came from the West (3%).

- During summer 2014, the Lee County lodging industry drew the largest proportion of its domestic visitors from New York, followed by Miami, Indianapolis, and Philadelphia DMAs.

| Summer 2014 Top DMAs (Paid Accommodations) | | |
| --- | --- | --- |
| New York | 13% | 60,293 |
| Miami-Fort Lauderdale | 6% | 28,560 |
| Indianapolis | 5% | 23,800 |
| Philadelphia | 5% | 22,213 |
| Tampa-Saint Petersburg | 4% | 20,627 |
| Cleveland-Akron | 4% | 20,627 |
| Cincinnati | 4% | 19,040 |
| Detroit | 4% | 17,453 |
| Pittsburgh | 3% | 14,280 |
| Chicago | 3% | 14,280 |

| Visitors Staying in Paid Accommodations | | | | | |
| --- | --- | --- | --- | --- | --- |
| | % | | Visitor Estimates | | % Change |
| Summer Season | 2013 | 2014 | 2013 | 2014 | |
| *Country of Origin* | | | | | |
| United States | 74% | 69% | 463,861 | 476,000 | 2.6% |
| Germany | 9% | 12% | 54,100 | 80,380 | 48.6% |
| UK | 4% | 7% | 28,052 | 45,214 | 61.2% |
| Canada | 3% | 5% | 19,035 | 35,166 | 84.7% |
| Scandinavia | 2% | 2% | 14,026 | 12,559 | -10.5% |
| BeNeLux | 1% | 2% | 8,015 | 12,559 | 56.7% |
| Switzerland | 1% | 1% | 7,013 | 10,047 | 43.3% |
| France | 2% | 1% | 11,020 | 7,536 | -31.6% |
| Austria | 1% | 1% | 6,011 | 3,768 | -37.3% |
| Latin America | <1% | 1% | 1,002 | 3,768 | 276.1% |
| Ireland | 1% | <1% | 5,009 | 1,256 | -74.9% |
| Other International | 1% | 1% | 5,009 | 5,024 | 0.3% |
| No Answer | <1% | - | 2,004 | - | - |

| Visitors Staying in Paid Accommodations | | | | | |
| --- | --- | --- | --- | --- | --- |
| | % | | Visitor Estimates | | % Change |
| Summer Season | 2013 | 2014 | 2013 | 2014 | |
| *U.S. Region of Origin* | | | | | |
| Florida | 22% | 16% | 103,191 | 74,573 | -27.7% |
| South (including Florida) | 45% | 33% | 207,385 | 155,493 | -25.0% |
| Midwest | 33% | 36% | 155,288 | 169,773 | 9.3% |
| Northeast | 17% | 29% | 77,143 | 138,040 | 78.9% |
| West | 2% | 3% | 9,017 | 12,693 | 40.8% |
| No Answer | 3% | - | 15,028 | - | - |

**Note: The percentage of visitors by origin market is based on data collected from visitors in the Visitor Profile Survey.  Respondents who did not answer the area of residence questions are excluded when calculating these percentages.**

Trip Planning

- For the majority of summer 2014 visitors, their Lee County trip was planned well in advance.  Seven in ten began talking about their Lee County trip *three or more months* in advance and six in ten chose the destination within that timeframe. Fewer visitors, however made their lodging reservations within that window.

    - 71% started talking about trip 3+ months in advance (vs. 73% in 2013)
    - 64% chose Lee County for trip  (vs. 67% in 2013)
    - 42% made lodging reservation (vs. 49% in 2013)

- The internet continues to be a popular planning tool among Lee County visitors with 89%  of summer visitors claiming to have visited one or more websites during the planning process.  Visitors most often mention using airline website (40%), followed by Trip Advisor  (30%), search engines (28%), hotel (27%), or vacation rental (26%) websites when preparing for their trip.

- Six in ten summer 2014 visitors indicated they use their laptop to access destination planning information online (65%).  Mobile devices continue to be on the rise, with half of summer visitors accessing  online content on a smartphone (52%), and a sizeable increase saying they use a tablet (46% vs. 33% in 2013).

- Summer 2014 visitors most frequently cited *peaceful/relaxing*  (80%),  *warm weather* (80%), and *white sandy beaches* (77%) as the attributes of the destination that positively influenced their selection of Lee County for their trip.  A *safe destination* (70%) and *convenient location* (68%) were also influential in selecting this destination.

Visitor Profile

- Similar to last summer, most visitors flew to the destination (72%  vs. 65% in 2013) and predominantly used the Southwest Florida International Airport (86%) – a slight increase from last year (80%).

- On average summer 2014 visitors stayed in Lee County for about 8 days. While most reported that they came to Lee County for a vacation trip (83%), there was a slight decrease in the proportion of mentions versus last year (90%).  In contrast, there was an increase in the proportion reporting they were visiting friends or relatives (28% vs. 21% in 2013).  Regardless of their reason for visiting Lee County, nearly three-quarters were repeat visitors (67%) who averaged  five trips to Lee County in the past five years.

- Among the summer 2014 visitors  interviewed, three in ten reported they were staying in hotel/motel/resort properties (32% vs. 39% in 2013) and four in ten in condo/vacation home properties  (39% vs. 46% in 2013).  Of those staying in paid accommodations, nearly all reported that the quality of their lodging either *met expectations* (45%) or *far exceeded/exceeded expectations* (50%).

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Visitor Profile (cont'd)

- The top activities visitors enjoyed in Lee County during summer 2014 included: *beaches* (94%), *relaxing* (76%), *dining out* (71%), and to a lesser extent, *swimming* (67%) and *shopping* (57%). Half of summer visitors took a day trip outside of Lee County (53%), traveling to Naples (31%) and a slight increase from last year visiting Sarasota (12% vs. 6% in 2013).

- Visitors continue to be highly satisfied with their stay in Lee County. Nearly all summer 2014 visitors said they were either *very satisfied* or *satisfied* with their visit (55% and 37% respectively). Furthermore, nine in ten reported they intend to return to Lee County (87%), with more than half suggesting they will do so next year (53%). Visitors also indicated they will spread the word about their positive experiences, with 89% indicating they will recommend Lee County over other areas in Florida.

- When asked what they liked *least* about the area, a quarter of summer 2014 visitors cited insects (25%) – similar to last year (27%). Beach seaweed (14%) and weather (9%) ranked as distant second and third in the list of disliked features, however, both of these features received fewer mentions when compared with the previous summer (17% and 22% respectively).

- The demographic composition of summer 2014 visitors can be summarized as follows:

  - 49 years of age on average
  - $103,200 household income on average
  - 74% married
  - 42% traveling as a family
  - 34% traveling as a couple
  - 32% traveling *with* children
  - 3 to 4 people in travel party on average

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Lodging Industry Assessments

- For the Lee County lodging industry in total, *available* room nights showed a 3.2% decrease from summer 2013 to 2014, however, *occupied* room nights increased 1.2%.  Hotel/motel/resort and RV/campground saw very little change in *available* room nights but an increase in *occupied* room nights, whereas condo/vacation homes saw sizeable decreases in both *available* and in *occupied* room nights.

| Summer Season | Occupied Room Nights | | | Available Room Nights | | |
|---|---|---|---|---|---|---|
| | 2013 | 2014 | % Change | 2013 | 2014 | % Change |
| Hotel/Motel/Resort/B&B | 532,562 | 568,125 | 6.7% | 1,007,222 | 996,884 | -1.0% |
| Condo/Cottage/Vacation Home | 198,205 | 169,779 | -14.3% | 426,320 | 376,067 | -11.8% |
| RV Park/Campground | 130,720 | 133,672 | 2.3% | 468,242 | 467,384 | -0.2% |
| **Total** | **861,487** | **871,576** | **1.2%** | **1,901,784** | **1,840,335** | **-3.2%** |

- The industry-wide average occupancy rate in Lee County increased from 45.3% in summer 2013 to 47.4% this summer (+4.6%). While hotels/motels/resorts and RV parks/campgrounds experienced growth in occupancy rate (+7.8% and +2.5% respectively), condos/vacation homes experienced a decrease (-3.0%) when compared to last summer.

- Lee County's average daily rate increased 3.7% year-over-year. All three lodging categories  posted  increases in ADR versus last summer.

- The increases in both average occupancy rate and ADR for the Lee County lodging industry produced a positive shift in RevPAR from summer 2013 to summer 2014 (+8.4%).  Year-over-year RevPAR performance was very favorable for all categories with hotels/motels/resorts and RV parks/campgrounds seeing the largest increases.

| Summer Season | Average Occupancy Rate | | | Average Daily Rate | | | RevPAR | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2013 | 2014 | % Change | 2013 | 2014 | % Change | 2013 | 2014 | % Change |
| Hotel/Motel/Resort/B&B | 52.9% | 57.0% | 7.8% | $115.41 | $120.58 | 4.5% | $61.02 | $68.72 | 12.6% |
| Condo/Cottage/Vacation Home | 46.5% | 45.1% | -3.0% | $145.85 | $153.67 | 5.4% | $67.81 | $69.38 | 2.3% |
| RV Park/Campground | 27.9% | 28.6% | 2.5% | $37.69 | $40.54 | 7.6% | $10.52 | $11.59 | 10.2% |
| **AVERAGE** | **45.3%** | **47.4%** | **4.6%** | **$110.62** | **$114.75** | **3.7%** | **$50.11** | **$54.34** | **8.4%** |

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Lodging Industry Assessments (cont'd)

- According to reports from Lee County property managers, reservations for fall season 2014 (October, November, and December) portray a climate of potential growth in business performance. Six-in-ten managers responding reported that their total level of reservations for October, November, and December are  up  over the same period the prior year (59% vs. 55% in 2013).  Another quarter said reservation for the next three months are at least the same as the same time last year (27% vs. 35% in 2013), and very few claimed that their reservations are down for the next three months (8% vs.9% in 2013).

# Summer 2014 Lee County Snapshot

## Total Visitation

| Summer Season | % | | Visitor Estimates | |
|---|---|---|---|---|
| | 2013 | 2014 | 2013 | 2014 |
| Paid Accommodations | 59% | 63% | 624,158 | 693,277 |
| Friends/Relatives | 41% | 37% | 428,409 | 404,232 |
| **Total Visitation** | | | *1,052,567* | *1,097,509* |

## Total Visitor Expenditures

| Summer Season | 2013 | 2014 | % Change |
|---|---|---|---|
| Total Visitor Expenditures | $469,867,023 | $479,045,667 | 2.0% |
| Paid Accommodations | $298,563,087 | $308,889,274 | 3.5% |

## Visitor Origin - Visitors Staying in Paid Accommodations

| Summer Season | % | | Visitor Estimates | |
|---|---|---|---|---|
| | 2013 | 2014 | 2013 | 2014 |
| Florida | 22% | 16% | 103,191 | 74,573 |
| | | | | |
| United States | 74% | 69% | 463,861 | 476,000 |
| Germany | 9% | 12% | 54,100 | 80,380 |
| UK | 4% | 7% | 28,052 | 45,214 |
| Canada | 3% | 5% | 19,035 | 35,166 |
| Other International | 9% | 8% | 55,102 | 56,517 |
| No Answer | <1% | - | 2,004 | - |

## First-Time/Repeat Visitors to Lee County

| Summer Season | 2013 | 2014 |
|---|---|---|
| First-time | 27% | 32% |
| Repeat | 72% | 67% |

| Summer Season | Average Occupancy Rate | | | Average Daily Rate | | | RevPAR | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2013 | 2014 | % Change | 2013 | 2014 | % Change | 2013 | 2014 | % Change |
| Hotel/Motel/Resort/B&B | 52.9% | 57.0% | 7.8% | $115.41 | $120.58 | 4.5% | $61.02 | $68.72 | 12.6% |
| Condo/Cottage/Vacation Home | 46.5% | 45.1% | -3.0% | $145.85 | $153.67 | 5.4% | $67.81 | $69.38 | 2.3% |
| RV Park/Campground | 27.9% | 28.6% | 2.5% | $37.69 | $40.54 | 7.6% | $10.52 | $11.59 | 10.2% |
| **AVERAGE** | **45.3%** | **47.4%** | **4.6%** | **$110.62** | **$114.75** | **3.7%** | **$50.11** | **$54.34** | **8.4%** |

# Calendar YTD 2014 Lee County Snapshot

## Total Calendar Year Visitation

| | % | | Visitor Estimates | |
|---|---|---|---|---|
| | 2013 | 2014 | 2013 | 2014 |
| Paid Accommodations | 56% | 59% | 2,091,118 | 2,307,500 |
| Friends/Relatives | 44% | 41% | 1,670,001 | 1,575,618 |
| **Total Visitation** | | | *3,761,119* | 3,883,118 |

## Total Visitor Expenditures

| | 2013 | 2014 | % Change |
|---|---|---|---|
| Total Visitor Expenditures | $2,186,438,031 | $2,238,032,397 | 2.4% |
| Paid Accommodations | $1,440,207,473 | $1,511,974,943 | 5.0% |

## Visitor Origin - Visitors Staying in Paid Accommodations

| | % | | Visitor Estimates | |
|---|---|---|---|---|
| | 2013 | 2014 | 2013 | 2014 |
| Florida | 10% | 7% | 169,897 | 120,409 |
| | | | | |
| US | 79% | 78% | 1,644,471 | 1,810,442 |
| Germany | 7% | 7% | 141,046 | 164,017 |
| Canada | 5% | 5% | 105,785 | 126,456 |
| UK | 3% | 3% | 64,112 | 80,130 |
| Other International | 6% | 5% | 128,224 | 126,456 |
| No Answer | <1% | - | 7,480 | - |

## First-Time/Repeat Visitors to Lee County

| | 2013 | 2014 |
|---|---|---|
| First-time | 27% | 32% |
| Repeat | 72% | 67% |

| | Average Occupancy Rate | | | Average Daily Rate | | | RevPAR | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2013 | 2014 | % Change | 2013 | 2014 | % Change | 2013 | 2014 | % Change |
| Hotel/Motel/Resort/B&B | 66.0% | 69.2% | 4.8% | $144.61 | $154.53 | 6.9% | $95.48 | $106.90 | 12.0% |
| Condo/Cottage/Vacation Home | 65.2% | 67.6% | 3.7% | $178.11 | $191.87 | 7.7% | $116.11 | $129.75 | 11.8% |
| RV Park/Campground | 51.1% | 50.3% | -1.6% | $49.33 | $52.23 | 5.9% | $25.18 | $26.25 | 4.2% |
| **AVERAGE** | **62.2%** | **64.1%** | **3.1%** | **$133.67** | **$142.87** | **6.9%** | **$83.15** | **$91.62** | **10.2%** |

**Visitor Profile Analysis**

**Summer 2014**

*A total of 935 interviews were conducted with visitors in Lee County during the summer months of July, August, and September 2014. A total sample of this size is considered accurate to plus or minus 3.2 percentage points at the 95% confidence level.*

*A total of 921 interviews were conducted with visitors in Lee County during the Summer months of July, August, and September 2013. A total sample of this size is considered accurate to plus or minus 3.2 percentage points at the 95% confidence level.*

# Travel Planning

| Summer Season | Started Talking About Trip | | Chose Lee County for Trip | | Made Lodging Reservations | |
|---|---|---|---|---|---|---|
| | 2013 | 2014 | 2013 | 2014 | 2013 | 2014 |
| | A | B | A | B | A | B |
| **Total Respondents** | **921** | **935** | **921** | **935** | **921** | **935** |
| <u>Less than 3 months (NET)</u> | <u>25%</u> | <u>25%</u> | <u>29%</u> | <u>29%</u> | <u>30%</u> | <u>29%</u> |
| <1 month | 4% | 5% | 6% | 6% | 6% | 8% |
| 1 month - <2 months | 10% | 9% | 13% | 12% | 13% | 12% |
| 2 months - <3 months | 11% | 11% | 11% | 11% | 11% | 9% |
| <u>3 months or more (NET)</u> | <u>73%</u> | <u>71%</u> | <u>67%</u> | <u>64%</u> | <u>49%b</u> | <u>42%</u> |
| 3 months - <6 months | 31% | 28% | 29% | 28% | 27% b | 22% |
| 6 months - <1 year | 29% | 30% | 23% | 25% | 16% | 15% |
| A year or more | 14% | 13% | 15% | 12% | 6% | 6% |
| No Lodging Reservations Made | - | - | - | - | 18% | 25%a |
| No Answer | 2% | 4%a | 3% | 7% a | 3% | 4% |

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?

### Summer 2014 Travel Planning

■ Started talking about trip  ■ Chose Lee County for trip  ■ Made lodging reservations*
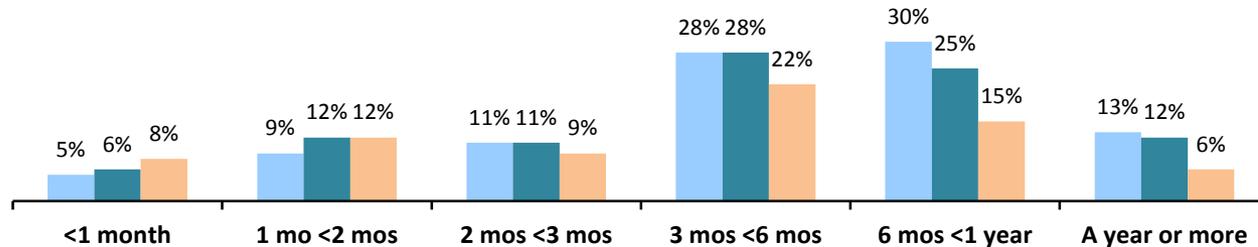


\* Base: Among those staying in paid accommodations

# Travel Planning

| Devices Used to Access Destination Planning Information | | |
|---|---|---|
| **Summer Season** | **2013** | **2014** |
| | **A** | **B** |
| **Total Respondents** | **921** | **935** |
| Any (NET) | 95% | 97%a |
| Laptop computer | 61% | 65% |
| Smartphone | 49% | 52% |
| Tablet | 33% | 46%a |
| Desktop computer | 44% | 41% |
| E-Reader | 5% | 4% |
| Other portable device | 1% | 1% |
| None of these | 4% b | 2% |
| 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 | | |
|---|---|---|
| **Summer Season** | **2013** | **2014** |
| | **A** | **B** |
| **Respondents who used a device to plan** | **874** | **910** |
| Visited web sites (net) | 85% | 89%a |
| Airline websites | 36% | 40% |
| Trip Advisor | 23% | 30%a |
| Search Engines | 32% | 28% |
| Hotel websites | 23% | 27% |
| Vacation rental websites * | n/a | 26% |
| Booking websites | 26% | 24% |
| www.FortMyers-Sanibel.com | 15% | 12% |
| AAA | 5% | 10%a |
| Visit Florida | 9% | 9% |
| Facebook | 5% | 7% |
| Other | 18%b | 11% |
| None/Didn't visit websites | 14%b | 11% |
| No Answer | 1% | 1% |

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

\* Note: Response option added in January 2014.

# Travel Planning

| Travel Information Requested | | |
|---|---|---|
| **Summer Season** | **2013** | **2014** |
| | **A** | **B** |
| **Total Respondents** | **921** | **935** |
| <u>Requested information (NET)</u> | <u>30%</u> | <u>28%</u> |
| Hotel Web Site | 13% | 11% |
| Visitor Guide | 3% | 6%a |
| VCB website | 8% | 6% |
| Call hotel/motel/condo | 6% | 5% |
| E-Newsletter | 1% | 1% |
| Call VCB | 1% | 1% |
| Call local Chamber of Commerce | 1% | <1% |
| Magazine Reader Service Card | - | <1% |
| Other | 8% | 7% |
| <u>None/Did not request information</u> | <u>66%</u> | <u>67%</u> |
| No Answer | 4% | 5% |

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

| Recall of Lee County Promotions | | |
|---|---|---|
| **Summer Season** | **2013** | **2014** |
| | **A** | **B** |
| **Total Respondents** | **921** | **935** |
| Yes | 26% | 38% a |
| No | 56% b | 41% |
| Can't Recall | 16% | 19% |
| No Answer | 2% | 2% |

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? *

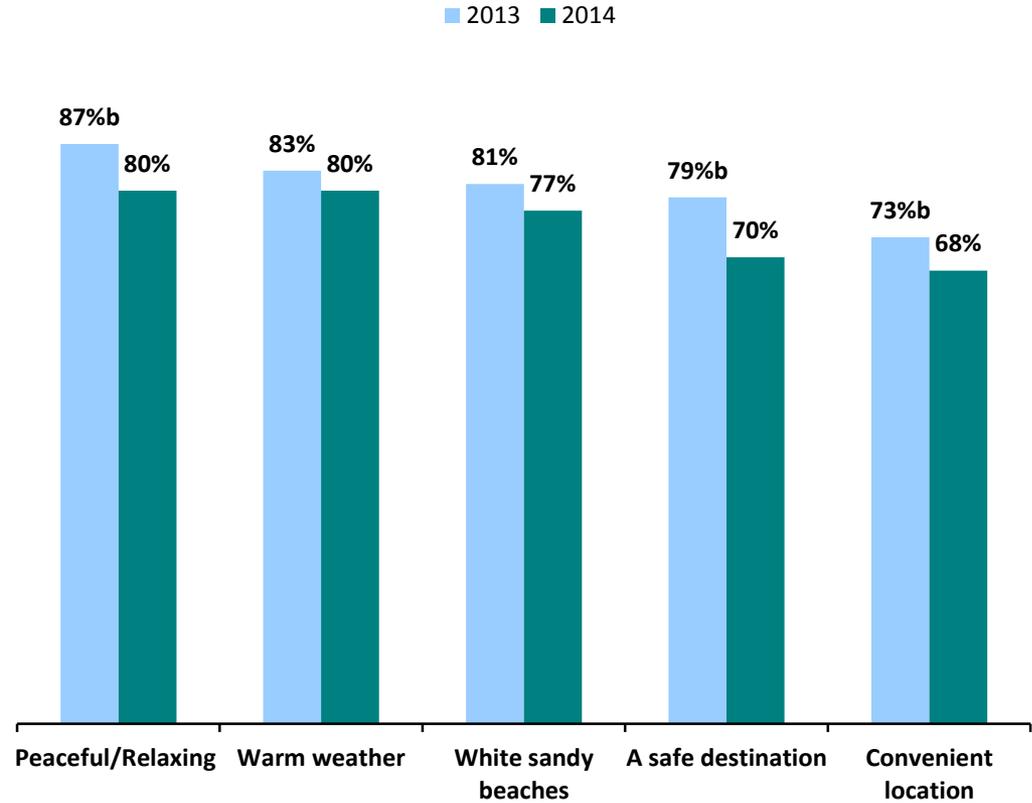* Note: Question wording changed in January 2014.  Therefore, results are not directly comparable to 2013.

### Recall of Promotions
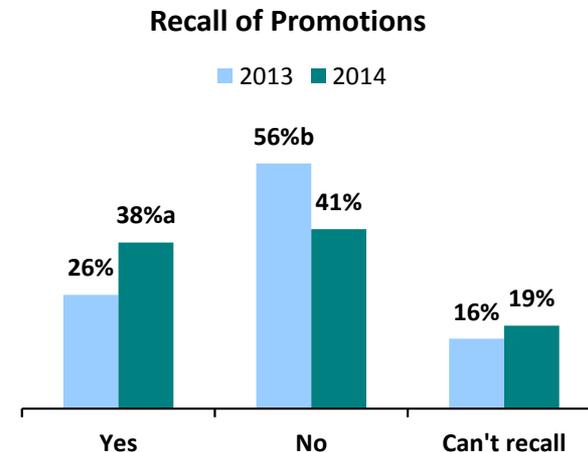
■ 2013 ■ 2014

# Travel Planning

## Travel Decision Influences*

| Summer Season | 2013 | 2014 |
|---|---|---|
| | A | B |
| **Total Respondents** | **921** | **935** |
| Peaceful/Relaxing | 87%b | 80% |
| Warm weather | 83% | 80% |
| White sandy beaches | 81% | 77% |
| A safe destination | 79%b | 70% |
| Convenient location | 73%b | 68% |
| Clean, unspoiled environment | 76%b | 64% |
| Good value for the money | 71%b | 63% |
| A "family" atmosphere | 66%b | 57% |
| Reasonably priced lodging | 66%b | 56% |
| Plenty to see and do | 61%b | 56% |
| Affordable dining | 59%b | 53% |
| Upscale accommodations | 58%b | 50% |

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)

### Top Travel Decisions Influences*



- 2013
- 2014

| | Peaceful/Relaxing | Warm weather | White sandy beaches | A safe destination | Convenient location |
|---|---|---|---|---|---|
| 2013 | 87%b | 83% | 81% | 79%b | 73%b |
| 2014 | 80% | 80% | 77% | 70% | 68% |

# Trip Profile

## Mode of Transportation

| Summer Season | 2013 | 2014 |
|---|---|---|
| | A | B |
| **Total Respondents** | **921** | **935** |
| Fly | 65% | 72%a |
| Drive a personal vehicle | 29%b | 22% |
| Drive a rental vehicle | 5% | 6% |
| Drive an RV | - | - |
| Travel by bus | - | - |
| Other/No Answer | <1% | <1% |

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

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

| Summer Season | 2013 | 2014 |
|---|---|---|
| | A | B |
| **Total Respondents** | **921** | **935** |
| One or more trips | 51% | 56%a |
| 1 trip | 34% | 35% |
| 2 to 3 trips | 12% | 16%a |
| 4 to 5 trips | 3% | 3% |
| 6 or more trips | 2% | 2% |
| None/No Answer | 49%b | 44% |

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

| Summer Season | 2013 | 2014 |
|---|---|---|
| | A | B |
| **Respondents who flew into the area** | **601** | **671** |
| SW Florida Int'l (Fort Myers) | 80% | 86%a |
| Miami Int'l | 5% | 3% |
| Orlando Int'l | 4% | 3% |
| Tampa Int'l | 5% | 3% |
| Punta Gorda* | n/a | 2% |
| Ft. Lauderdale Int'l | 3% | 1% |
| West Palm Beach Int'l** | <1% | n/a |
| Sarasota / Bradenton** | <1% | n/a |
| Other | 3%b | 1% |
| No Answer | <1% | 1% |

Q2: At which Florida airport did you land?

 * Note: Response option added in January 2014.
 ** Note:  Response options removed in January 2014.

# Trip Profile

| Trip Length Mean # of Days | | |
|---|---|---|
| Summer Season | 2013 | 2014 |
| | A | B |
| Total Respondents | 921 | 935 |
| Away from home | 10.6 | 10.1 |
| In Florida | 10.1 | 9.6 |
| In Lee County | 8.7 | 8.2 |

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

**Trip Length (mean # of days)**

■ 2013 ■ 2014



| Away from home | In Florida | In Lee County |
|---|---|---|
| 10.6  10.1 | 10.1  9.6 | 8.7  8.2 |
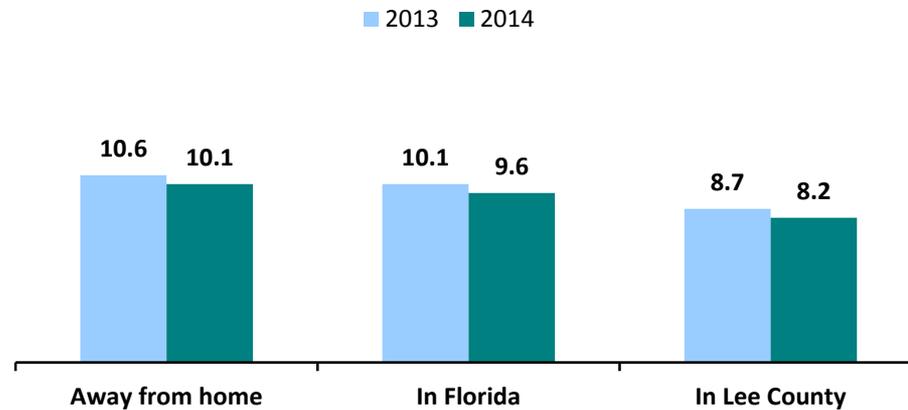
# Trip Profile

| Reason(s) for Visit | | |
| --- | --- | --- |
| **Summer Season** | **2013** | **2014** |
| | **A** | **B** |
| **Total Respondents** | **921** | **935** |
| A Vacation | 90%b | 83% |
| Visiting Friends / Relatives | 21% | 28%a |
| Personal Business | 1% | 3%a |
| Other Business Trip | 1% | 1% |
| A Conference/Meeting | <1% | 1% |
| Sporting Event(s) | 1% | 1% |
| A Convention/Trade Show | <1% | <1% |
| Other/No Answer (NET) | 1% | 1% |

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

## Reason for Visit



■ 2013 ■ 2014

90%b   83%

21%   28%a

A Vacation          Visiting Friends / Relatives
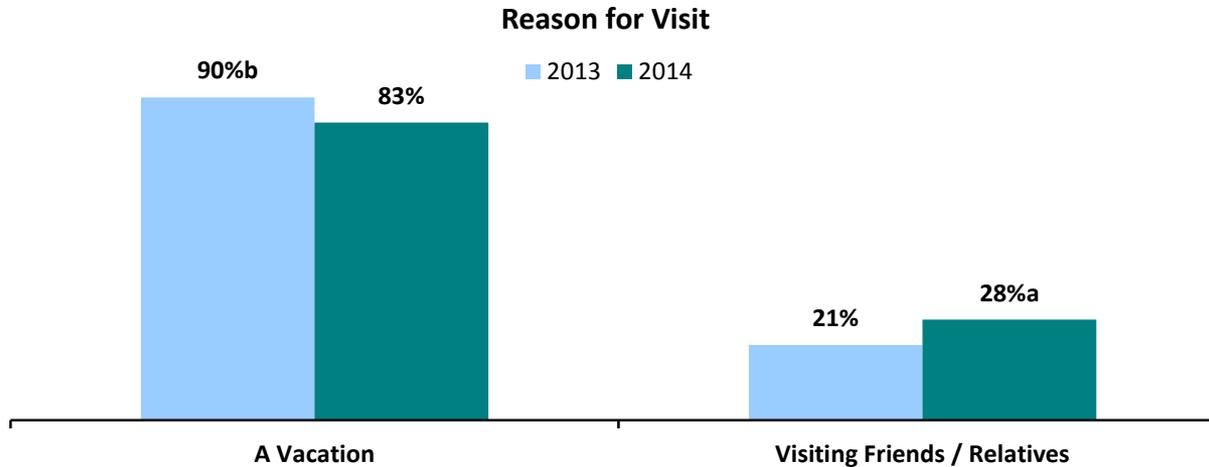
# Trip Profile

## First Time Visitors to Lee County

| Summer Season | Total | | Florida Residents | | Out-of-State Residents | | International Visitors | |
|---|---|---|---|---|---|---|---|---|
| | 2013 | 2014 | 2013 | 2014 | 2013 | 2014 | 2013 | 2014 |
| | A | B | A | B | A | B | A | B |
| Total Respondents | 921 | 935 | 134 | 62* | 526 | 471 | 229 | 239 |
| First-time visitor | 20% | 19% | 16% | 12% | 23% | 23% | 16% | 14% |
| Repeat visitor | 72%b | 67% | 84% | 86% | 73% | 73% | 61%b | 50% |
| No Answer | 1% | 1% | - | 2% | 1% | 1% | - | <1% |

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

## First Time Visitors to Florida

| Summer Season | 2013 | 2014 |
|---|---|---|
| | A | B |
| Total Respondents | 921 | 935 |
| Yes, first-time visitor | 8% | 13%a |
| No | 78% | 79% |
| No answer | <1% | 2% |
| *FL Residents** | 15%b | 7% |

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 .*

### First Time Visitors

- 2013  2014
- To Florida: 8% (2013), 13%a (2014)
- To Lee County: 20% (2013), 19% (2014)
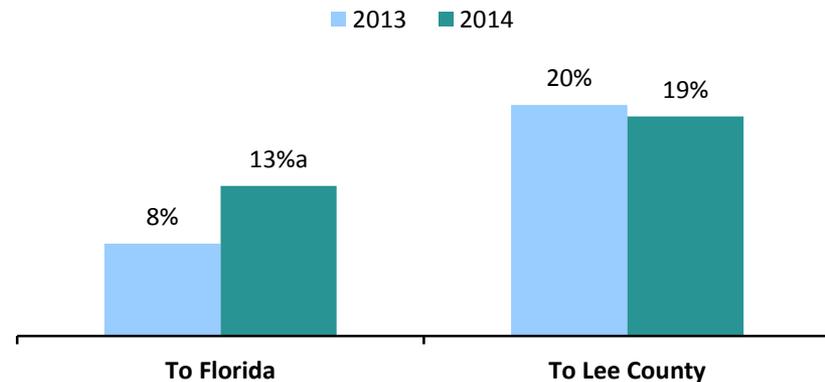
# Trip Profile

| Previous Visits in Five Years | | | | |
|---|---|---|---|---|
| | Mean # of Visits to Florida | | Mean # of Visits to Lee County | |
| Summer Season | 2013 | 2014 | 2013 | 2014 |
| | A | B | A | B |
| Base: Repeat Visitors | 716 (FL res. Excl) | 739 (FL res. Excl) | 663 | 627 |
| Number of visits | 5.0 | 5.0 | 5.2 | 4.9 |

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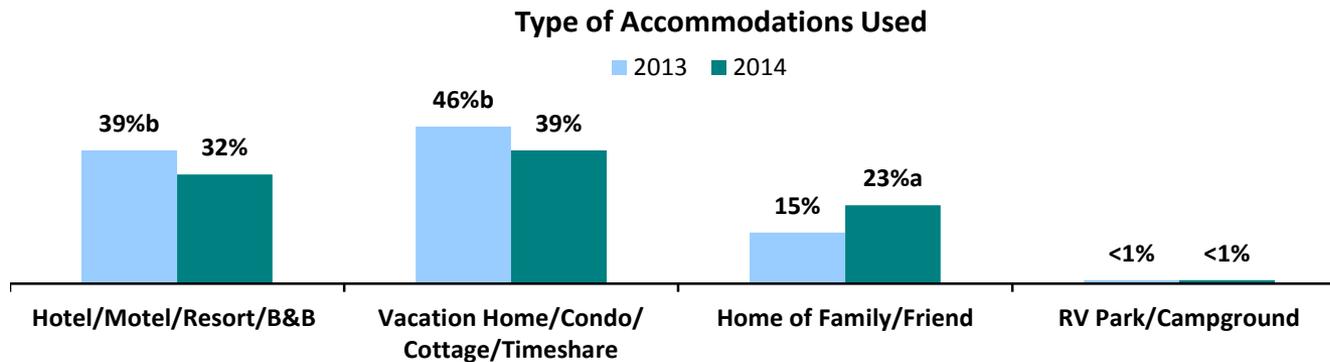Q16: Over the past five (5) years, how many times have you visited Lee County?

**Previous Visits in Five Years**
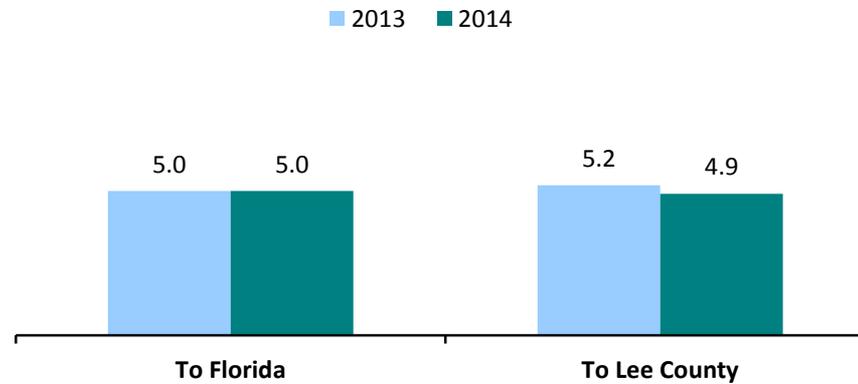
■ 2013  ■ 2014

# Trip Profile

| Type of Accommodations Used | | |
|---|---|---|
| **Summer Season** | **2013** | **2014** |
| | **A** | **B** |
| **Total Respondents** | **921** | **935** |
| **Hotel/Motel/Resort/B&B (NET)** | **39%b** | **32%** |
|    Hotel/motel/historic inn | 19% | 21% |
|    Resort | 20%b | 12% |
|    Bed and Breakfast | <1% | <1% |
| **Vacation Home/Condo/Cottage/Timeshare (NET)** | **46%b** | **39%** |
|    Rented | 29% | 27% |
|    Owned | 12%b | 7% |
|    Borrowed | 5% | 5% |
| **RV Park/Campground (NET)** | **<1%** | **<1%** |
| **Home of family or a friend** | **15%** | **23%a** |
| **Daytripper (No Accommodations)** | **<1%** | **4%a** |

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

## Type of Accommodations Used



■ 2013 ■ 2014

| | Hotel/Motel/Resort/B&B | Vacation Home/Condo/ Cottage/Timeshare | Home of Family/Friend | RV Park/Campground |
|---|---|---|---|---|
| 2013 | 39%b | 46%b | 15% | <1% |
| 2014 | 32% | 39% | 23%a | <1% |

# Trip Profile

| Quality of Accommodations | | | | |
|---|---|---|---|---|
| | **Total Respondents** | | **Paid Accommodations** | |
| **Summer Season** | **2013** | **2014** | **2013** | **2014** |
| | **A** | **B** | **A** | **B** |
| **Respondents** | **921** | **935** | **622** | **557** |
| Far exceeded/Exceeded expectations | 52% | 50% | 48% | 50% |
| Met your expectations | 41% | 39% | 44% | 45% |
| Did not meet/Far below expectations | 3% | 3% | 3% | 3% |
| No Answer | 4% | 9%a | 4%b | 2% |

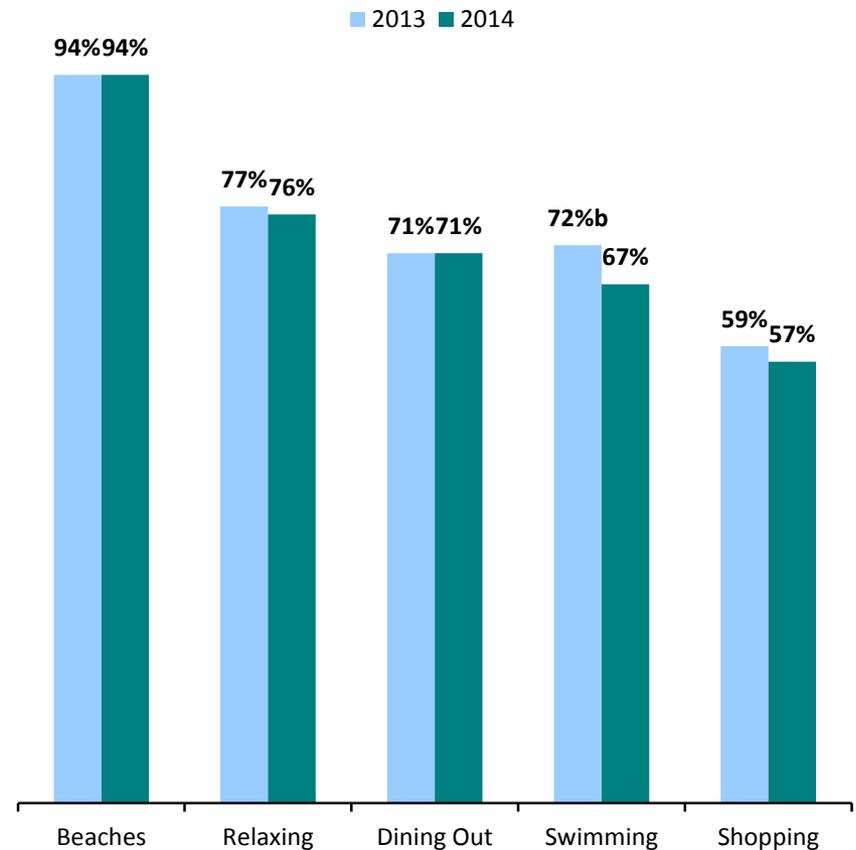Q21: How would you describe the quality of your accommodations?  Do you feel they:

## Quality of Accommodations
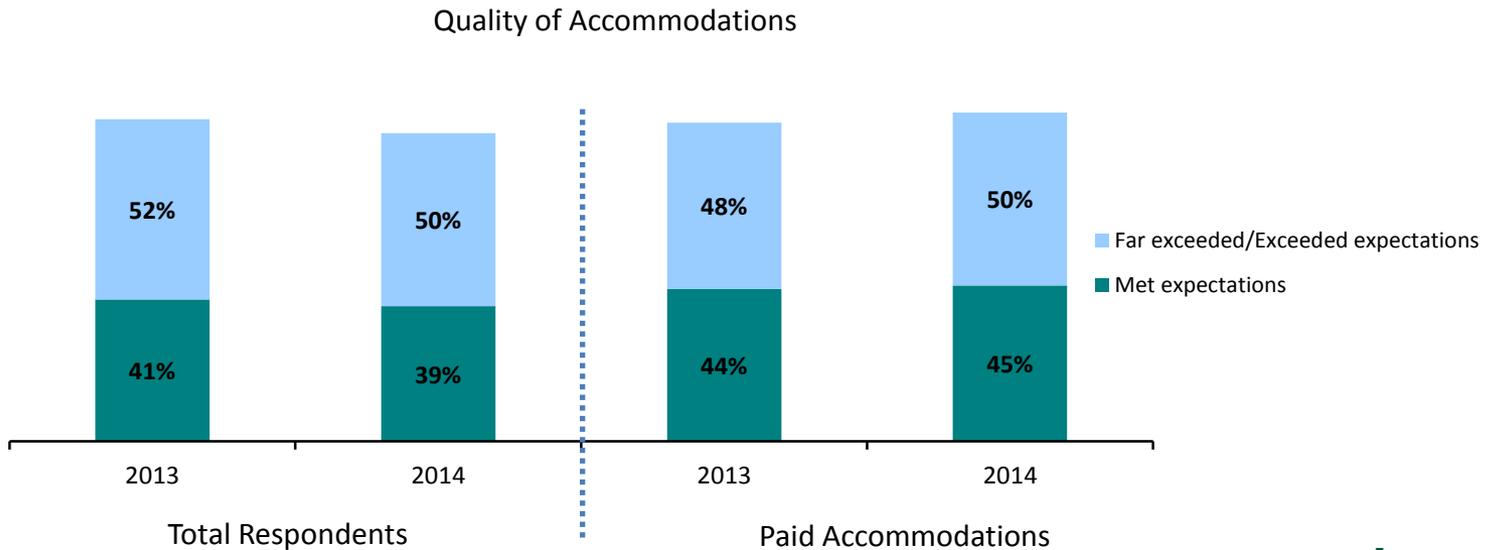
## Trip Activities

| Activities Enjoyed | | |
|---|---|---|
| **Summer Season** | **2013** | **2014** |
| | **A** | **B** |
| **Total Respondents** | **921** | **935** |
| Beaches | 94% | 94% |
| Relaxing | 77% | 76% |
| Dining Out | 71% | 71% |
| Swimming | 72%b | 67% |
| Shopping | 59% | 57% |
| Shelling | 42% | 38% |
| Sightseeing | 33% | 37% |
| Visiting Friends/Relatives | 24% | 25% |
| Watching Wildlife | 20% | 23% |
| Attractions | 25%b | 19% |
| Photography | 21%b | 18% |
| Bicycle Riding | 16% | 17% |
| Exercise/Working Out | 15% | 13% |
| Bars/Nightlife | 14% | 13% |
| Boating | 11% | 13% |
| Birdwatching | 13% | 12% |
| Fishing | 12% | 12% |
| Golfing | 7% | 11%a |
| Miniature Golf | 10% | 9% |
| Parasailing / Jet Skiing | 9% | 9% |
| Kayaking / Canoeing | 7% | 9% |
| Guided Tour | 4% | 6%a |
| Cultural Events | 4% | 4% |
| Tennis | 3% | 4% |
| Sporting Event | 5% | 3% |
| Scuba Diving/Snorkeling | 2% | 3% |
| Other | 3% | 3% |
| No Answer | <1% | 2%a |

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



**Top Activities Enjoyed**
■ 2013 ■ 2014

| | Beaches | Relaxing | Dining Out | Swimming | Shopping |
|---|---|---|---|---|---|
| 2013 | 94% | 77% | 71% | 72%b | 59% |
| 2014 | 94% | 76% | 71% | 67% | 57% |

# Trip Activities

| Attractions Visited | | |
|---|---|---|
| **Summer Season** | **2013** | **2014** |
| | **A** | **B** |
| **Total Respondents** | **921** | **935** |
| Beaches | 86% | 84% |
| Fort Myers Beach Pier | 45% | 44% |
| Sanibel Lighthouse | 33% | 33% |
| Miromar Outlets Mall* | 24% | 31%a |
| Tanger Outlet Center | 26% | 24% |
| Edison/Ford Estates | 22% | 21% |
| Coconut Point Mall | 13% | 14% |
| Ding Darling National Wildlife Refuge | 12% | 14% |
| Bell Tower Shops | 12% | 11% |
| Periwinkle Place | 14%a | 11% |
| Gulf Coast Town Center | 9% | 10% |
| Edison Mall | 11%b | 9% |
| Shell Factory and Nature Park | 12%b | 7% |
| Bailey-Matthews Shell Museum | 3% | 3% |
| Manatee Park | 3% | 3% |
| Broadway Palm Dinner Theater | 2% | 2% |
| Babcock Wilderness Adventures | 1% | 1% |
| Barbara B. Mann Perfoming Arts Hall | 1% | 1% |
| Other | 4% | 5% |
| None/No Answer (NET) | 5% | 5% |
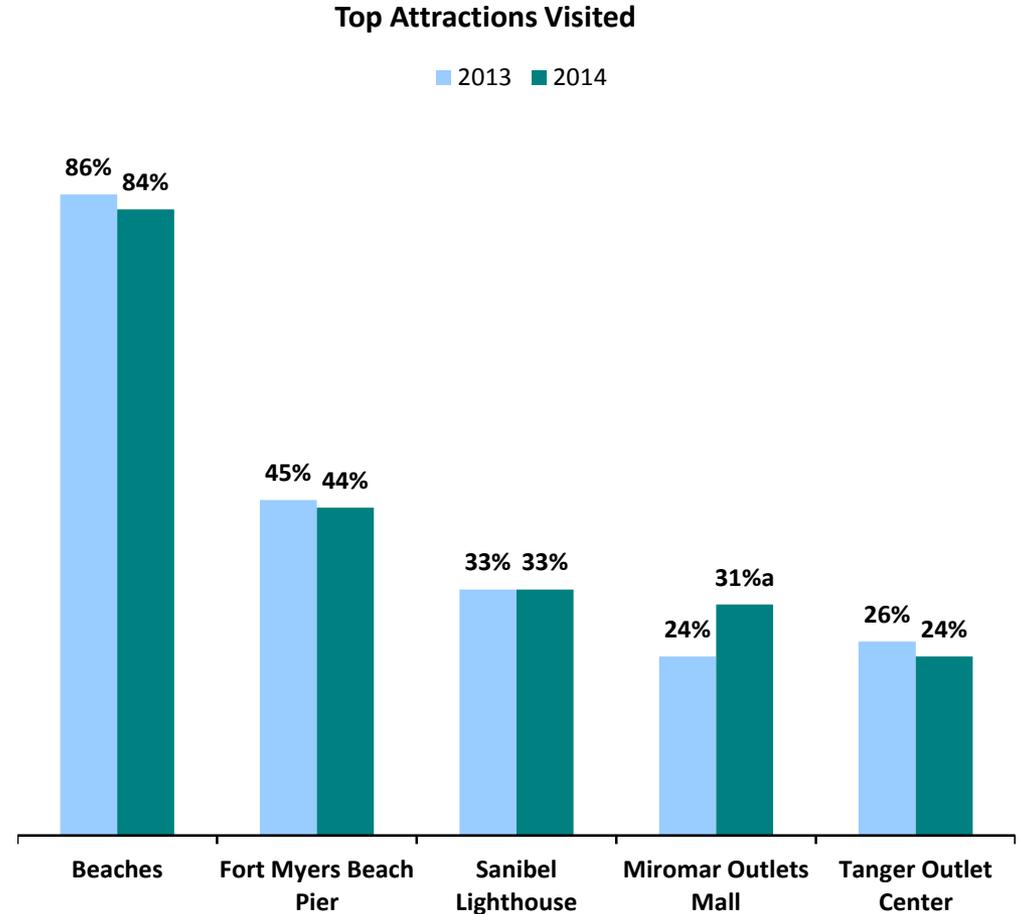
Q24.  On this trip, which attractions are you visiting?  *(Please mark ALL that apply.)*

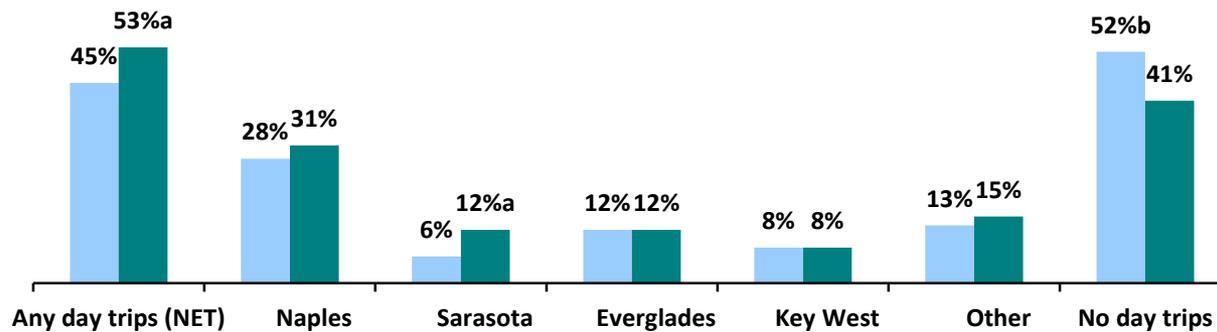\* Note: Miromar Outlets Mall was  included as a survey location for summer 2014 but not for 2013.

## Top Attractions Visited

■ 2013  ■ 2014



| | Beaches | Fort Myers Beach Pier | Sanibel Lighthouse | Miromar Outlets Mall | Tanger Outlet Center |
|---|---|---|---|---|---|
| 2013 | 86% | 45% | 33% | 24% | 26% |
| 2014 | 84% | 44% | 33% | 31%a | 24% |

# Trip Activities

| Day Trips Outside Lee County | | |
|---|---|---|
| Summer Season | 2013 | 2014 |
| | A | B |
| Total Respondents | 921 | 935 |
| Any day trips (NET) | 45% | 53%a |
|    Naples | 28% | 31% |
|    Sarasota | 6% | 12%a |
|    Everglades | 12% | 12% |
|    Key West | 8% | 8% |
|    Other | 13% | 15% |
| No day trips | 52%b | 41% |
| No Answer | 11% | 14% |

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

## Day Trips Outside Lee County

■ 2013  ■ 2014



| | Any day trips (NET) | Naples | Sarasota | Everglades | Key West | Other | No day trips |
|---|---|---|---|---|---|---|---|
| 2013 | 45% | 28% | 6% | 12% | 8% | 13% | 52%b |
| 2014 | 53%a | 31% | 12%a | 12% | 8% | 15% | 41% |

# Lee County Experience

| Satisfaction with Visit | | |
|---|---|---|
| **Summer Season** | **2013** | **2014** |
| | **A** | **B** |
| **Total Respondents** | **921** | **935** |
| <u>Very Satisfied/Satisfied</u> | <u>94%</u> | <u>92%</u> |
| *Very Satisfied* | 60%b | 55% |
| *Satisfied* | 34% | 37% |
| Neither | 2% | 2% |
| Dissatisfied/Very Dissatisfied | 1% | <1% |
| Don't know/no answer | 3% | 6%a |

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

### Satisfaction with Visit
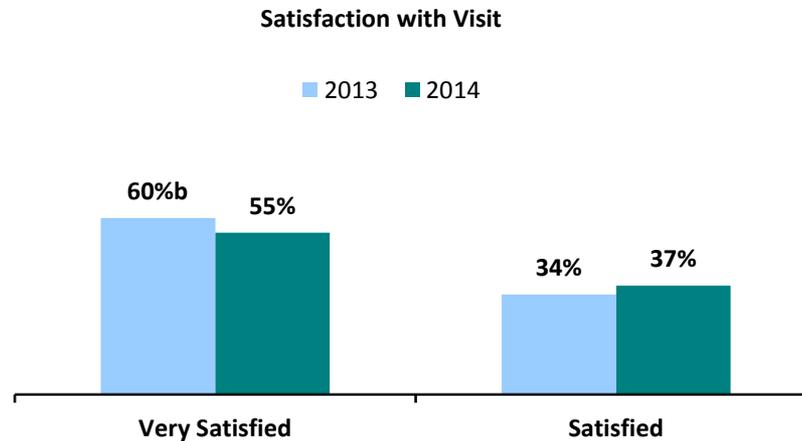
■ 2013  ■ 2014

# Future Plans

| Likelihood to Recommend/Return to Lee County | | |
|---|---|---|
| **Summer Season** | **2013** | **2014** |
| | **A** | **B** |
| **Total Respondents** | **921** | **935** |
| Likely to Recommend Lee County | 88% | 89% |
| Likely to Return to Lee County | 88% | 87% |
| **Base:  Total Respondents Planning to Return** | **812** | **810** |
| Likely to Return Next Year | 56% | 53% |

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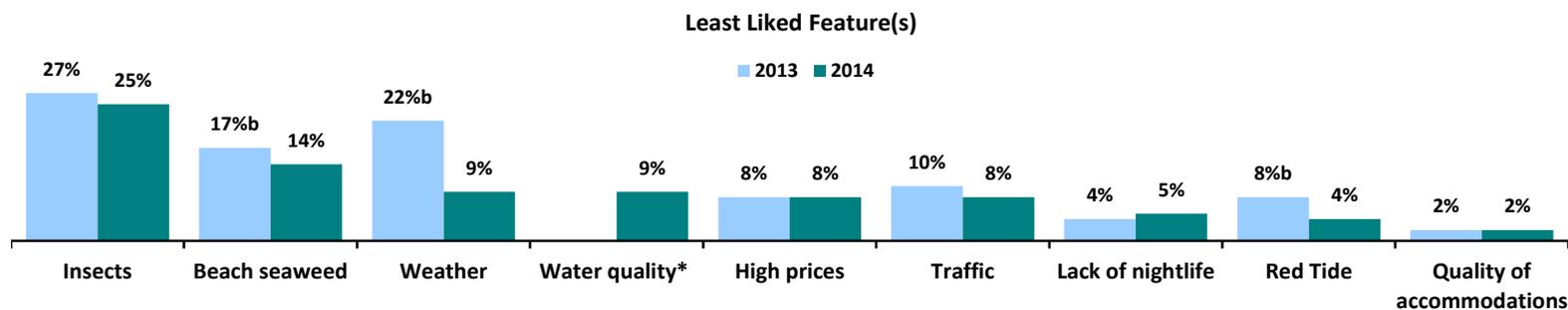Q32: Will you come back next year?

## Likelihood to Recommend/Return to Lee County (Responded "Yes")



Legend: 2013, 2014

Likely to Recommend Lee County: 88% (2013), 89% (2014)
Likely to Return to Lee County: 88% (2013), 87% (2014)
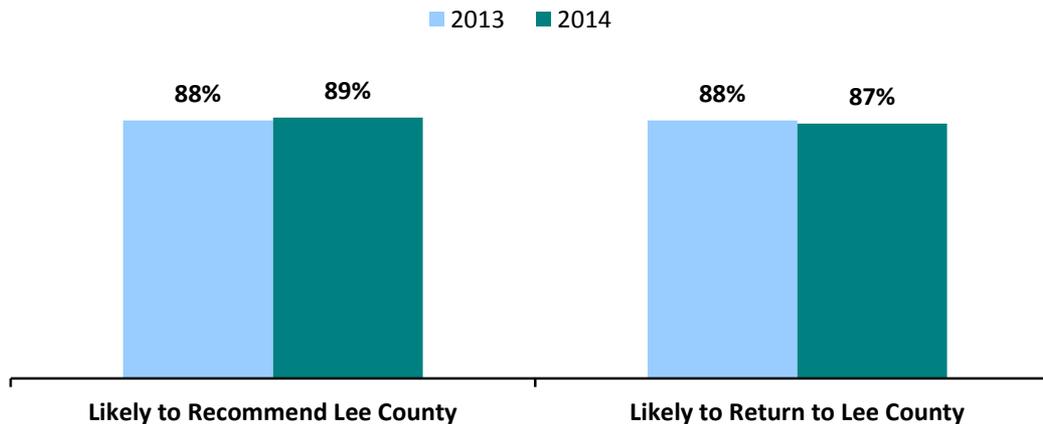
# Trip Activities

| Least Liked Features | | |
| --- | --- | --- |
| **Summer Season** | **2013** | **2014** |
| | **A** | **B** |
| **Total Respondents** | **921** | **935** |
| Insects | 27% | 25% |
| Beach seaweed | 17%b | 14% |
| Weather | 22%b | 9% |
| Water quality* | n/a | 9% |
| High prices | 8% | 8% |
| Traffic | 10% | 8% |
| Lack of nightlife | 4% | 5% |
| Red Tide | 8%b | 4% |
| Quality of accommodations | 2% | 2% |
| Other | 10%b | 4% |
| Nothing/No Answer (NET) | 29% | 41%a |

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

## Least Liked Feature(s)



■ 2013 ■ 2014

| | Insects | Beach seaweed | Weather | Water quality* | High prices | Traffic | Lack of nightlife | Red Tide | Quality of accommodations |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| 2013 | 27% | 17%b | 22%b | | 8% | 10% | 4% | 8%b | 2% |
| 2014 | 25% | 14% | 9% | 9% | 8% | 8% | 5% | 4% | 2% |

* Note: Response option added in January 2014.

# Trip Activities

| Perception of Lee County as Expensive | | |
|---|---|---|
| **Summer Season** | **2013** | **2014** |
| | **A** | **B** |
| **Total Respondents** | **921** | **935** |
| More Expensive | 8% | 9% |
| Less Expensive | 5% | 6% |
| As Expected | 80% | 79% |
| 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
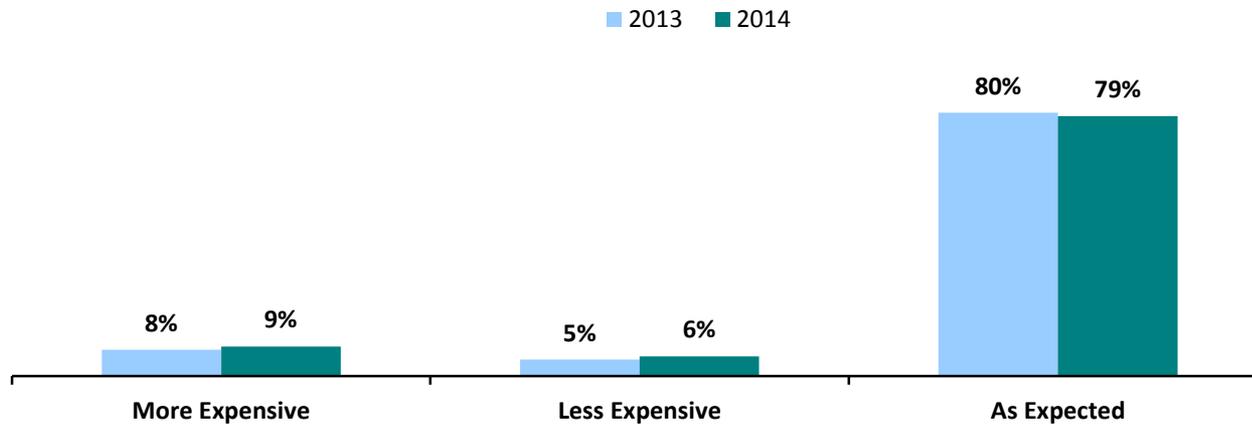
■ 2013  ■ 2014

# Visitor and Travel Party Demographic Profile

| Visitor Demographic Profile | | |
| --- | --- | --- |
| **Summer Season** | **2013** | **2014** |
| | **A** | **B** |
| **Total Respondents** | **921** | **935** |
| Age of respondent (mean) | 48.1 | 49.0 |
| Annual household income (mean) | $104,259 | $103,189 |
| Martial Status | | |
| Married | 69% | 74%a |
| Single | 13% | 13% |
| Other | 13%b | 10% |
| Vacations per year (mean) | 2.9 | 3.0 |
| Short getaways per year (mean) | 3.4 | 3.4 |

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 | | |
| --- | --- | --- |
| **Summer Season** | **2013** | **2014** |
| | **A** | **B** |
| **Total Respondents** | **921** | **935** |
| Family | 47%b | 42% |
| Couple | 32% | 34% |
| Group of couples/friends | 12% | 13% |
| Single | 6% | 9%a |
| | | |
| Mean travel party size | 3.4 | 3.3 |
| Mean adults in travel party | 2.7 | 2.7 |

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

| Travel Parties with Children | | |
| --- | --- | --- |
| **Summer Season** | **2013** | **2013** |
| | **A** | **B** |
| **Total Respondents** | **921** | **935** |
| Traveling with any Children (net) | 37%b | 32% |
| Any younger than 6 | 13%b | 9% |
| Any ages 6-11 | 16% | 14% |
| Any 12-17 years old | 22% | 19% |
| No Children | 63% | 68%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

**THE BEACHES OF FORT MYERS AND SANIBEL**

## Total Visitation

| Summer Season | % 2013 | % 2014 | Visitor Estimates 2013 | Visitor Estimates 2014 | % Change |
|---|---|---|---|---|---|
| Paid Accommodations | 59% | 63% | 624,158 | 693,277 | 11.1% |
| Friends/Relatives | 41% | 37% | 428,409 | 404,232 | -5.6% |
| *Total Visitation* | | | *1,052,567* | *1,097,509* | *4.3%* |

## Visitor Origin (Paid Accommodation Guests)

| Country of Origin | % 2013 | % 2014 | Visitor Estimates 2013 | Visitor Estimates 2014 | % Change |
|---|---|---|---|---|---|
| United States | 74% | 69% | 463,861 | 476,000 | 2.6% |
| Germany | 9% | 12% | 54,100 | 80,380 | 48.6% |
| UK | 4% | 7% | 28,052 | 45,214 | 61.2% |
| Canada | 3% | 5% | 19,035 | 35,166 | 84.7% |
| Scandinavia | 2% | 2% | 14,026 | 12,559 | -10.5% |
| BeNeLux | 1% | 2% | 8,015 | 12,559 | 56.7% |
| Switzerland | 1% | 1% | 7,013 | 10,047 | 43.3% |
| France | 2% | 1% | 11,020 | 7,536 | -31.6% |
| Austria | 1% | 1% | 6,011 | 3,768 | -37.3% |
| Latin America | <1% | 1% | 1,002 | 3,768 | 276.1% |
| Ireland | 1% | <1% | 5,009 | 1,256 | -74.9% |
| Other International | 1% | 1% | 5,009 | 5,024 | 0.3% |
| No Answer | <1% | - | 2,004 | - | - |

| U.S. Region of Origin | 2013 | 2014 | 2013 | 2014 | % Change |
|---|---|---|---|---|---|
| Florida | 22% | 16% | 103,191 | 74,573 | -27.7% |
| South (including Florida) | 45% | 33% | 207,385 | 155,493 | -25.0% |
| Midwest | 33% | 36% | 155,288 | 169,773 | 9.3% |
| Northeast | 17% | 29% | 77,143 | 138,040 | 78.9% |
| West | 2% | 3% | 9,017 | 12,693 | 40.8% |
| No Answer | 3% | - | 15,028 | - | - |

## Summer 2014 Top DMAs (Paid Accommodations)

| DMA | % | Estimate |
|---|---|---|
| New York | 13% | 60,293 |
| Miami-Fort Lauderdale | 6% | 28,560 |
| Indianapolis | 5% | 23,800 |
| Philadelphia | 5% | 22,213 |
| Tampa-Saint Petersburg | 4% | 20,627 |
| Cleveland-Akron | 4% | 20,627 |
| Cincinnati | 4% | 19,040 |
| Detroit | 4% | 17,453 |
| Pittsburgh | 3% | 14,280 |
| Chicago | 3% | 14,280 |

Note: The percentage of visitors by origin market is based on data collected from visitors in the Visitor Profile Survey. Respondents who did not answer the area of residence questions are excluded when calculating these percentages.

dpa Davidson Peterson Associates

**Occupancy Data Analysis**

**Summer 2014**

*For the 2014 summer season, property managers were interviewed in October 2014 to provide data for each specific month of the season (July, August, and September 2014).*

*For the 2013 summer season, property managers were interviewed in October 2013, to provide data for each specific month of the season (July, August, and September 2013).*
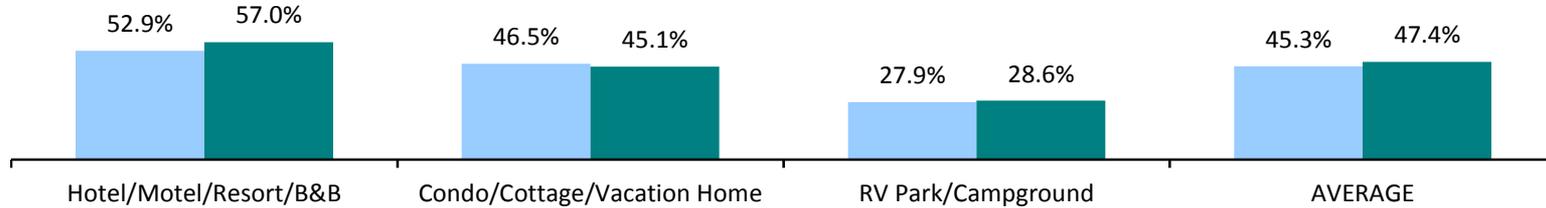
# Occupancy/Daily Rates

| Summer Season | Average Occupancy Rate | | | Average Daily Rate | | | RevPAR | | |
|---|---|---|---|---|---|---|---|---|---|
| | 2013 | 2014 | % Change | 2013 | 2014 | % Change | 2013 | 2014 | % Change |
| Hotel/Motel/Resort/B&B | 52.9% | 57.0% | 7.8% | $115.41 | $120.58 | 4.5% | $61.02 | $68.72 | 12.6% |
| Condo/Cottage/Vacation Home | 46.5% | 45.1% | -3.0% | $145.85 | $153.67 | 5.4% | $67.81 | $69.38 | 2.3% |
| RV Park/Campground | 27.9% | 28.6% | 2.5% | $37.69 | $40.54 | 7.6% | $10.52 | $11.59 | 10.2% |
| **AVERAGE** | **45.3%** | **47.4%** | **4.6%** | **$110.62** | **$114.75** | **3.7%** | **$50.11** | **$54.34** | **8.4%** |

Q16: What was your overall average occupancy rate for the month of [July/August/September]?
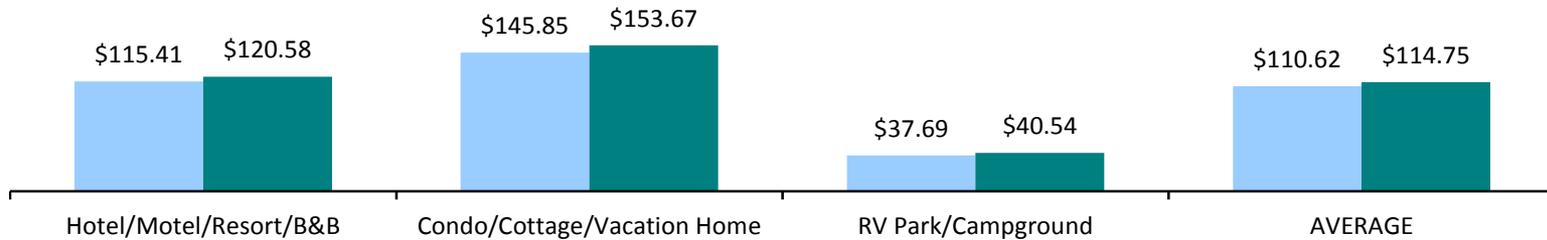Q17: What was your average daily rate (ADR) in [July/August/September]?
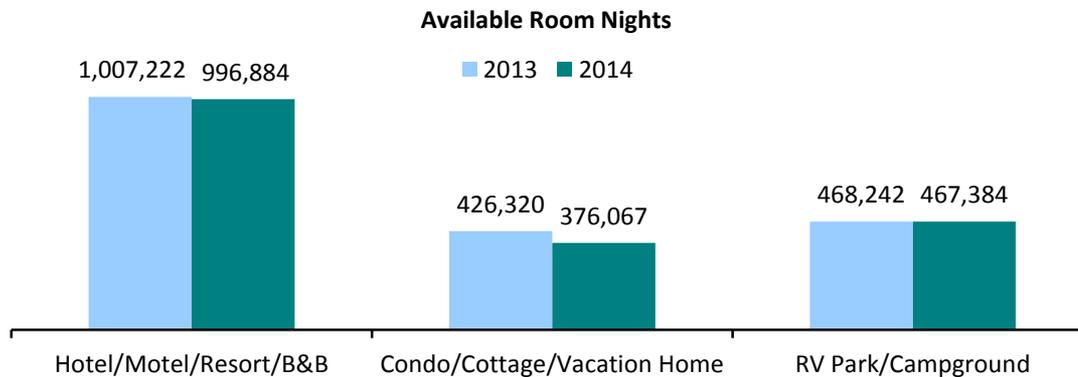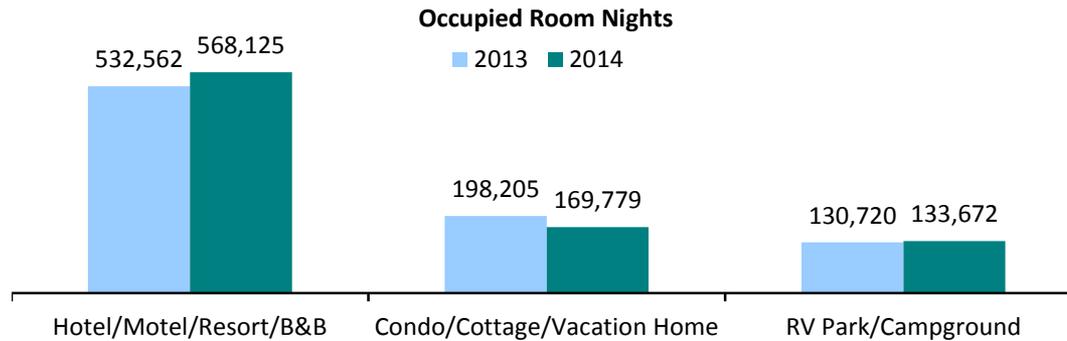
## Average Occupancy Rate

2013   2014



| | Hotel/Motel/Resort/B&B | Condo/Cottage/Vacation Home | RV Park/Campground | AVERAGE |
|---|---|---|---|---|
| 2013 | 52.9% | 46.5% | 27.9% | 45.3% |
| 2014 | 57.0% | 45.1% | 28.6% | 47.4% |

## Average Daily Rate

2013   2014



| | Hotel/Motel/Resort/B&B | Condo/Cottage/Vacation Home | RV Park/Campground | AVERAGE |
|---|---|---|---|---|
| 2013 | $115.41 | $145.85 | $37.69 | $110.62 |
| 2014 | $120.58 | $153.67 | $40.54 | $114.75 |

# Room/Unit/Site Nights

| Summer Season | Occupied Room Nights | | | Available Room Nights | | |
|---|---|---|---|---|---|---|
| | **2013** | **2014** | **% Change** | **2013** | **2014** | **% Change** |
| Hotel/Motel/Resort/B&B | 532,562 | 568,125 | 6.7% | 1,007,222 | 996,884 | -1.0% |
| Condo/Cottage/Vacation Home | 198,205 | 169,779 | -14.3% | 426,320 | 376,067 | -11.8% |
| RV Park/Campground | 130,720 | 133,672 | 2.3% | 468,242 | 467,384 | -0.2% |
| **Total** | **861,487** | **871,576** | **1.2%** | **1,901,784** | **1,840,335** | **-3.2%** |

### Occupied Room Nights

2013    2014

532,562  568,125
Hotel/Motel/Resort/B&B

198,205  169,779
Condo/Cottage/Vacation Home

130,720  133,672
RV Park/Campground

### Available Room Nights

2013    2014

1,007,222  996,884
Hotel/Motel/Resort/B&B

426,320  376,067
Condo/Cottage/Vacation Home

468,242  467,384
RV Park/Campground

# Average Party Size and Length of Stay

| Summer Season | Average Party Size | | | Average Length of Stay | | |
|---|---|---|---|---|---|---|
| | 2013 | 2014 | % Change | 2013 | 2014 | % Change |
| Hotel/Motel/Resort/B&B | 2.6 | 2.5 | -2.7% | 3.0 | 2.8 | -8.3% |
| Condo/Cottage/Vacation Home | 4.2 | 4.8 | 13.3% | 6.9 | 6.3 | -9.3% |
| RV Park/Campground | 2.4 | 2.3 | -5.4% | 6.4 | 7.3 | 14.2% |
| **Average** | **2.9** | **2.9** | **1.0%** | **4.0** | **3.7** | **-8.0%** |

Q18: What was your average number of guests per room/site/unit in [July/August/September]?
Q19: What was the average length of stay (in nights) of your guests in [July/August/September]?
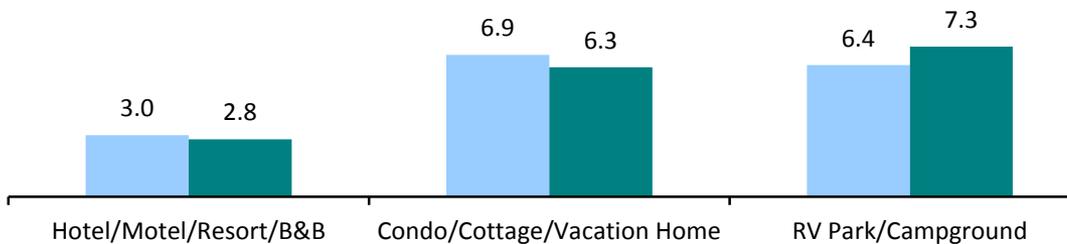
### Average Party Size
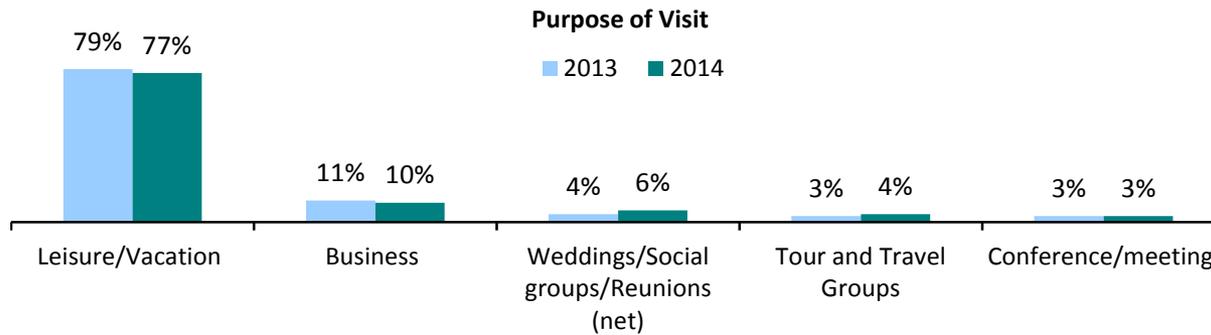■ 2013 ■ 2014
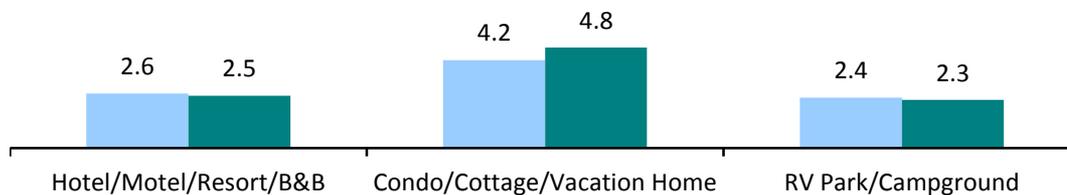


### Average Length of Stay
■ 2013 ■ 2014

# Lodging Management Estimates

| Guest Profile | | |
|---|---|---|
| **Summer Season** | **2013** | **2014** |
| | **A** | **B** |
| **Total Number of Responses** | **107** | **99** |
| <u>Purpose of Visit</u> | | |
| Leisure/Vacation | 79% | 77% |
| Business | 11% | 10% |
| Weddings/Social groups/Reunions (net) | 4% | 6% |
| Tour and Travel Groups | 3% | 4% |
| Conference/meeting | 3% | 3% |

Q22: What percent of your [July/August/September] room/site/unit occupancy do you estimate was generated by:

**Purpose of Visit**

# Occupancy Barometer

| Level of Reservations for Next 3 Months Compared to Last Year | | |
|---|---|---|
| Summer Season | 2013 | 2014 |
| | A | B |
| Total Respondents | 117 | 107 |
| Up/Same (net) | 90% | 86% |
| Up | 55% | 59% |
| Same | 35% | 27% |
| Down | 9% | 8% |

Q24: Compared to October, November, and December of [prior year], is your property's total level of reservations up, the same or down for October, November, and December of [current year]?
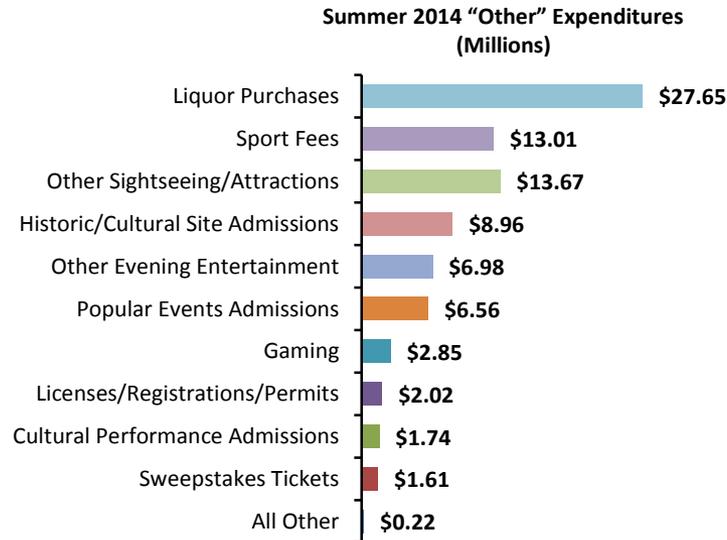
### Level of Reservations for Next 3 Months
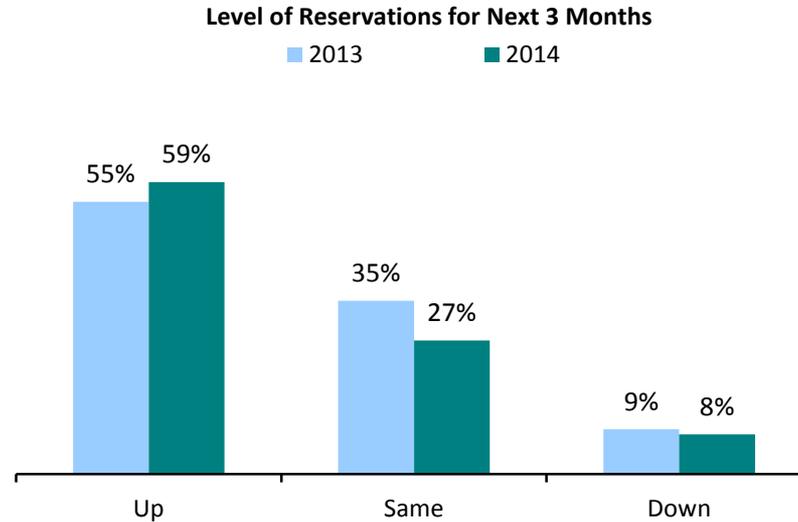
**Economic Impact Analysis**

**Summer 2014**

# Total Visitor Expenditures by Spending Category

| TOTAL EXPENDITURES | | | |
|---|---|---|---|
| **Summer Season** | **2013** | **2014** | **% Change** |
| TOTAL | $469,867,023 | $479,045,667 | 2.0% |
| Food and Beverages | $125,995,356 | $128,935,362 | 2.3% |
| Shopping | $123,608,014 | $123,779,875 | 0.1% |
| Lodging Accommodations | $95,295,729 | $100,012,810 | 4.9% |
| Ground Transportation | $39,597,064 | $41,053,678 | 3.7% |
| Other | $85,370,860 | $85,263,942 | -0.1% |

(Note: Other includes the categories detailed below.)

**Summer 2014 "Other" Expenditures**
**(Millions)**

| Category | Amount |
|---|---|
| Liquor Purchases | $27.65 |
| Sport Fees | $13.01 |
| Other Sightseeing/Attractions | $13.67 |
| Historic/Cultural Site Admissions | $8.96 |
| Other Evening Entertainment | $6.98 |
| Popular Events Admissions | $6.56 |
| Gaming | $2.85 |
| Licenses/Registrations/Permits | $2.02 |
| Cultural Performance Admissions | $1.74 |
| Sweepstakes Tickets | $1.61 |
| All Other | $0.22 |

(Note: The sum of the numbers in the chart may not match the "other" row in the table above due to rounding.)
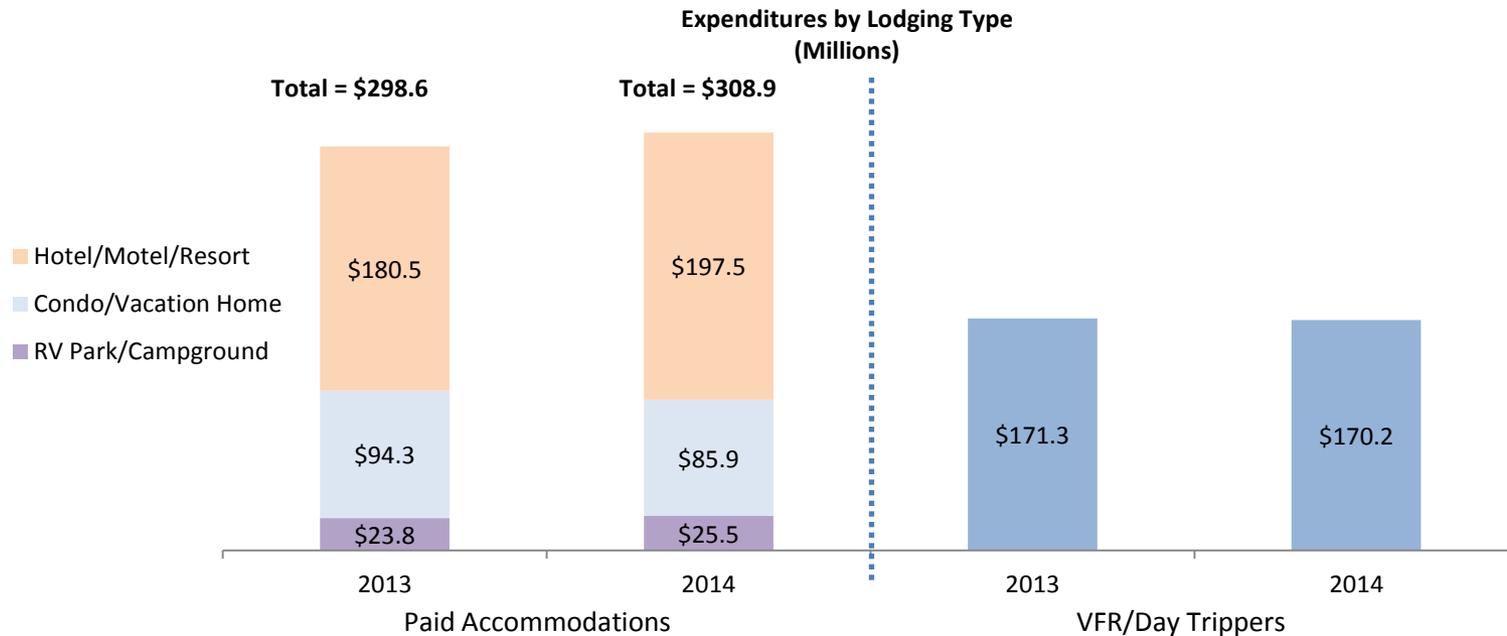
# Total Visitor Expenditures by Lodging Type

| TOTAL EXPENDITURES | | | | | | |
|---|---|---|---|---|---|---|
| | Staying Paid Accommodations | | | Visiting Friends and Relatives/Day Trippers | | |
| Summer Season | 2013 | 2014 | % Change | 2013 | 2014 | % Change |
| TOTAL | $298,563,087 | $308,889,274 | 3.5% | $171,303,936 | $170,156,393 | -0.7% |
| Lodging Accommodations | $95,295,729 | $100,012,810 | 4.9% | $0 | $0 | - |
| Food and Beverages | $69,695,704 | $71,375,597 | 2.4% | $56,299,652 | $57,559,765 | 2.2% |
| Shopping | $66,829,595 | $67,351,915 | 0.8% | $56,778,419 | $56,427,960 | -0.6% |
| Ground Transportation | $22,679,850 | $24,874,335 | 9.7% | $16,917,214 | $16,179,343 | -4.4% |
| Other | $44,062,209 | $45,274,617 | 2.8% | $41,308,651 | $39,989,325 | -3.2% |

"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 | | | | | |
|---|---|---|---|---|---|
| Summer Season | 2013 | 2014 | % Change | 2013 | 2014 |
| TOTAL | $469,867,023 | $479,045,667 | 2.0% | 100% | 100% |
| Visiting Friends & Relatives/Day Trippers | $171,303,936 | $170,156,393 | -0.7% | 36% | 36% |
| Paid Accommodations | $298,563,087 | $308,889,274 | 3.5% | 64% | 64% |
| *Hotel/Motel/Resort/B&B* | $180,504,843 | $197,473,622 | 9.4% | 38% | 41% |
| *Condo/Cottage/Vacation Home* | $94,271,036 | $85,866,276 | -8.9% | 20% | 18% |
| *RV Park/Campground* | $23,787,208 | $25,549,376 | 7.4% | 5% | 5% |



Expenditures by Lodging Type (Millions)

Total = $298.6    Total = $308.9

Legend:
- Hotel/Motel/Resort
- Condo/Vacation Home
- RV Park/Campground

Paid Accommodations: 2013 — $180.5, $94.3, $23.8; 2014 — $197.5, $85.9, $25.5
VFR/Day Trippers: 2013 — $171.3; 2014 — $170.2

# 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 <u>direct</u> and <u>total</u> 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 <u>direct</u> and <u>indirect</u> impacts.

<u>Indirect</u> 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.
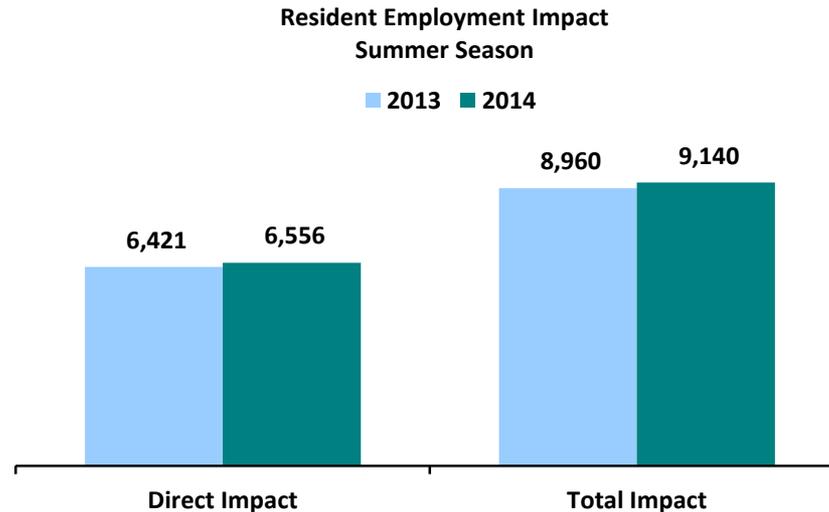
# Impact on Jobs for Lee County Residents

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**
**Summer Season**

■ **2013**  ■ **2014**

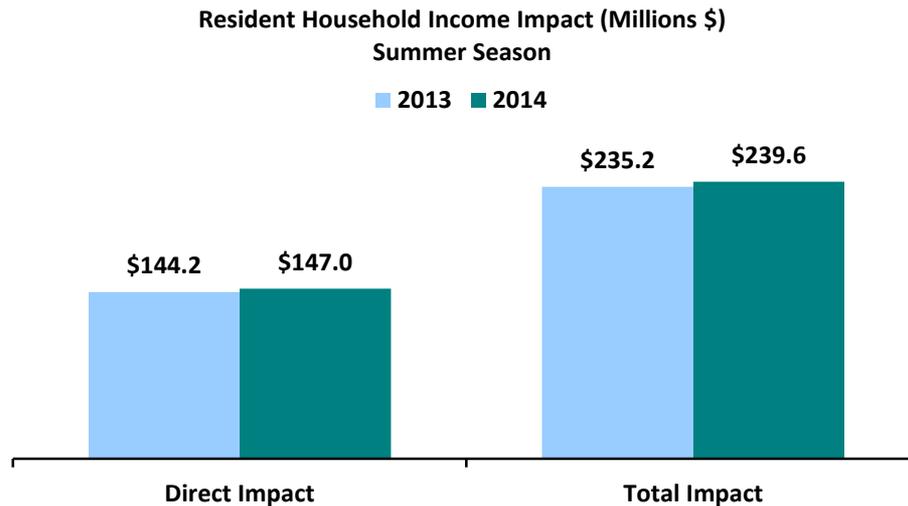| | Direct Impact | Total Impact |
|---|---|---|
| 2013 | 6,421 | 8,960 |
| 2014 | 6,556 | 9,140 |

# Impact on Household Income for Lee County Residents

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

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

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

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

**Resident Household Income Impact (Millions $)**
**Summer Season**

■ 2013  ■ 2014

|  | Direct Impact | Total Impact |
|---|---|---|
| 2013 | $144.2 | $235.2 |
| 2014 | $147.0 | $239.6 |

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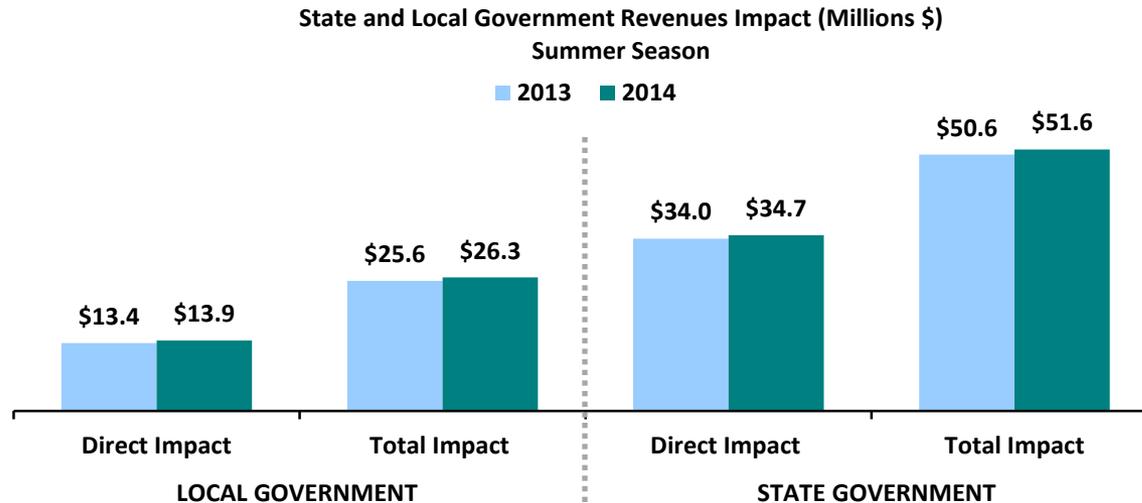
The gross government revenues accruing to governments as a result of producing the output purchased with visitor expenditures is the government revenue impact.

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).

**State and Local Government Revenues Impact (Millions $)**
**Summer Season**



Chart legend: 2013, 2014

Local Government: Direct Impact — $13.4 (2013), $13.9 (2014); Total Impact — $25.6 (2013), $26.3 (2014)

State Government: Direct Impact — $34.0 (2013), $34.7 (2014); Total Impact — $50.6 (2013), $51.6 (2014)

LOCAL GOVERNMENT          STATE GOVERNMENT

**Appendix**

**Summer 2014**

# July 2014 Interviewing Statistics

| City | Event/Location | Interviewing Dates | Number of Interviews |
|------|----------------|--------------------|----------------------|
| Fort Myers Beach | The Pier | 7/3/14 | 28 |
| Fort Myers Beach | Estero Beach Club | 7/3/14 | 12 |
| North Fort Myers | Shell Factory | 7/5/14 | 5 |
| RSW | RSW Airport | 7/7/14 | 32 |
| Sanibel | Lighthouse Beach | 7/8/14 | 18 |
| Sanibel | Tarpon Point | 7/8/14 | 12 |
| Bonita Springs | Bonita Beach | 7/11/14 | 29 |
| Fort Myers | Edison Estates | 7/16/14 | 22 |
| Estero | Miromar Outlets | 7/18/14 | 18 |
| Fort Myers | Centennial Park | 7/19/14 | 8 |
| Fort Myers Beach | Winward Passage | 7/21/14 | 7 |
| Fort Myers Beach | Cane Palm Condos | 7/21/14 | 6 |
| Fort Myers Beach | Best Western | 7/21/14 | 12 |
| Fort Myers Beach | Bay to Beach | 7/21/14 | 6 |
| Fort Myers | Edison Estates | 7/24/14 | 28 |
| RSW | RSW Airport | 7/26/14 | 32 |
| Sanibel | Sanibel Surfside | 7/28/14 | 12 |
| Sanibel | Holiday Inn | 7/28/14 | 8 |
| Sanibel | Casa Ybel | 7/28/14 | 9 |
| Sanibel | Pointe Santo | 7/28/14 | 11 |
| | | | |
| **Total** | | | **315** |

# August 2014 Interviewing Statistics

| City | Event/Location | Interviewing Dates | Number of Interviews |
|---|---|---|---|
| RSW | RSW Airport | 8/2/14 | 32 |
| Sanibel | Tarpon Point | 8/4/14 | 15 |
| Sanibel | Pointe Santo | 8/4/14 | 15 |
| Sanibel | Holiday Inn | 8/4/14 | 12 |
| Fort Myers Beach | Best Western | 8/7/14 | 12 |
| Fort Myers Beach | Estero Beach Club | 8/7/14 | 15 |
| Fort Myers Beach | Neptune Inn | 8/7/14 | 10 |
| Fort Myers | Edison Estates | 8/12/14 | 22 |
| Bonita Springs | Bonita Beach | 8/14/14 | 26 |
| Cape Coral | Cape Coral Yacht | 8/15/14 | 5 |
| RSW | RSW Airport | 8/23/14 | 30 |
| Sanibel | Sanibel Surfside | 8/26/14 | 10 |
| Sanibel | Loggerhead Cay | 8/26/14 | 10 |
| Sanibel | Casa Ybel | 8/26/14 | 8 |
| Fort Myers | Edison Estates | 8/28/14 | 29 |
| Estero | Miromar Outlets | 8/29/14 | 15 |
| Fort Myers Beach | Times Square | 8/30/14 | 33 |
| Fort Myers | Centennial Park | 8/30/14 | 11 |
| | | | |
| **Total** | | | **310** |

# September 2014 Interviewing Statistics

| City | Event/Location | Interviewing Dates | Number of Interviews |
|------|----------------|--------------------|----------------------|
| Sanibel | Lighthouse Beach | 9/1/14 | 27 |
| Fort Myers Beach | Best Western | 9/4/14 | 12 |
| Fort Myers Beach | The Pier | 9/4/14 | 30 |
| RSW | RSW Airport | 9/6/14 | 33 |
| Cape Coral | Cape Coral Yacht | 9/12/14 | 10 |
| Bonita Springs | Bonita Beach | 9/10/14 | 28 |
| Fort Myers | Centennial Park | 9/14/14 | 12 |
| Sanibel | Pointe Santo | 9/16/14 | 9 |
| Sanibel | Loggerhead Cay | 9/16/14 | 14 |
| Sanibel | Holiday Inn | 9/16/14 | 12 |
| Fort Myers | Edison Estates | 9/18/14 | 25 |
| North Fort Myers | Shell Factory | 9/20/14 | 9 |
| Fort Myers | Summerlin Square Trolly | 9/25/14 | 5 |
| Fort Myers Beach | Estero Beach Club | 9/26/14 | 10 |
| Fort Myers Beach | Bay to Beach | 9/26/14 | 10 |
| Fort Myers Beach | Neptune Inn | 9/26/14 | 9 |
| RSW | RSW Airport | 9/27/14 | 31 |
| Estero | Miromar Outlets | 9/29/14 | 12 |
| Fort Myers | Edison Estates | 9/30/14 | 12 |
| | | | |
| **Total** | | | **310** |

# Occupancy Interviewing Statistics

Interviews were conducted during the first two weeks of October 2014 to gather data for July, August, and September 2014 lodging activity.  Information was provided by 123 Lee County lodging properties.

| Lodging Type | Summer 2014 Number of Interviews |
|---|---|
|  |  |
| Hotel/Motel/Resort/B&Bs | 74 |
| Condo/Cottage/Vacation Home/Timeshare | 31 |
| RV Park/Campground | 18 |
| **Total** | **123** |