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

Spring 2018 Visitor Profile and Occupancy Analysis

August 9, 2018

Prepared for:

Lee County Board of County Commissioners

Lee County Visitor and Convention Bureau

Prepared by:

Davidson-Peterson Associates

dpa
Davidson Peterson
Associates

Executive Summary

Spring 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 <u>statistically significant</u>.

A difference is said to be statistically significant (at the 95% confidence level) if the <u>probability of the difference occurring purely by chance</u> 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

Visitation Estimates

- During spring 2018, Lee County hosted approximately 1.3 million visitors, with 866,000 visitors staying in paid accommodations and an additional 480,000 staying with friends or relatives.

- Spring 2018 visitation among paid accommodations guests was up 1.4% from 2017, and visitation among those staying with friends or relatives was up 0.8% year-over-year. As a result, total visitation increased 1.2% year-over-year.

Estimated Visitation	Spring 2017	Spring 2018	% Change
Paid Accommodations	853,367	865,503	1.4%
Friends/Relatives	476,082	479,694	0.8%
Total Visitation	**1,329,449**	**1,345,197**	**1.2%**

Visitor Expenditures

- Spring 2018 visitors spent an estimated $755 million during their stay in Lee County – a 3.8% increase from last spring ($728 million).

- Paid accommodations guests spent $527 million (70% of the total) – a 5% increase from last spring ($500 million). Spending among visitors staying with friends or relatives was about even with last year, contributing $229 million to the total.

Estimated Expenditures	Spring 2017	Spring 2018	% Change
Paid Accommodations	$500,090,495	$526,702,281	5.3%
Friends/Relatives	$227,944,523	$228,748,104	0.4%
Total Expenditures	**$728,035,018**	**$755,450,385**	**3.8%**

Note: Spring season refers to the period including April, May, and June when referenced throughout this report.

Visitor Origin

- Eight in ten spring 2018 visitors staying in paid accommodations reside within the United States (84%). Germany and Canada represented the largest share of international paid accommodation guests (7% and 3% respectively).

- Four out of ten *domestic* paid accommodations visitors came from the Midwest (39%). One-third came from the South (including in-state visitors), and the Northeast contributed one-fourth of domestic paid accommodations visitors. The remaining 5% came from the West.

- The top domestic feeder markets for the Lee County lodging industry during spring 2018 were Boston (7%), Chicago (6%), New York (5%), and Tampa (5%).

Spring 2018 Top DMAs (Paid Accommodations)

Boston (Manchester, NH)	7%	53,890
Chicago	6%	40,882
New York	5%	33,449
Tampa-Saint Petersburg (Sarasota)	5%	33,449
Cleveland-Akron (Canton)	4%	31,590
Miami-Fort Lauderdale	3%	24,157
Indianapolis	3%	24,157
Milwaukee	3%	22,299
Minneapolis-Saint Paul	3%	22,299
Detroit	3%	20,441

Visitors Staying in Paid Accommodations

	%		Visitor Estimates		Direction of Change
Spring Season	2017	2018	2017	2018	
Country of Origin					
United States	79%	84%	677,585	728,439	+
Germany	7%	7%	61,599	60,062	-
Canada	7%	3%	63,101	29,261	-
UK	2%	2%	19,531	16,940	-
Scandinavia	1%	1%	28,546	9,240	-
Latin America	<1%	1%	1,502	4,620	+
France	<1%	<1%	1,502	1,540	+
Other International	2%	2%	19,531	15,400	-

Visitors Staying in Paid Accommodations

	%		Visitor Estimates		Direction of Change
Spring Season	2017	2018	2017	2018	
U.S. Region of Origin					
Florida	8%	11%	53,711	78,047	+
South (including Florida)	25%	31%	167,331	228,566	+
Midwest	46%	39%	309,871	282,456	-
Northeast	25%	25%	171,462	182,110	+
West	4%	5%	28,921	35,307	+

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 the 2018 percentages.

Trip Planning

- The trip planning window reported by spring 2018 visitors was comparable in length to that of spring 2017 visitors. For many visitors, their trip was planned well in advance. Six out of ten chose Lee County as their destination *three or more months* in advance. Among those staying in paid accommodations, over half made their lodging reservations within that window as well.

    - 58% chose Lee County for trip (vs. 66% in 2017)
    - 55% made lodging reservation (vs. 58% in 2017)

- Use of the internet as a planning tool continues to be widespread among Lee County visitors, with 77% of spring visitors claiming to have visited one or more websites during the planning process (a decrease from 86% in 2017). Visitors most often mention using *airline websites* (31% vs. 44% in 2017), followed by *search engines* (24% vs. 29% in 2017), *Trip Advisor* (20% vs. 21% in 2017), *hotel websites* (19% vs. 24% in 2017), and *booking websites* (19% vs. 24% in 2017) when preparing for their trip.

- The most likely characteristics to motivate travelers' decisions to visit Lee County in spring 2018 included:
    - *Warm weather (86%);*
    - *Peaceful/relaxing (85%);*
    - *White sandy beaches* (82%);
    - *A safe destination* (75%); and
    - *Clean, unspoiled environment* (72%).

Visitor Profile

- Three in four visitors flew to the destination, with Southwest Florida International Airport (79 vs. 84% in 2017) being the airport mentioned most often as an entry point for visitors traveling by air.

- Spring visitors reported they were staying in Lee County 10 days on average. The majority were repeat visitors (79% vs. 70% in 2017) who have taken an average of six trips to Lee County in the past five years.

Visitor Profile (cont'd)

- Half of spring 2018 paid accommodation guests said they were staying in hotel/motel/resort properties (a decrease from 64% in 2017). Nearly as many stayed at condo/vacation home properties (47% vs. 35% in 2017), and only a small number in RV parks/campgrounds (2% vs. 1% in 2017). Nearly all of those staying in paid accommodations reported that the quality of their lodgings *met their expectations* (52%) or *exceeded their expectations* (41%).

- The top activities enjoyed in Lee County during spring 2018 included: *beaches* (94% vs. 96% in 2017), *relaxing* (75% vs. 71% in 2017), *dining out* (74% vs. 76% in 2017), *swimming,* (62% vs. 65% in 2017) and *shopping* (56% vs. 60% in 2017). When asked which attractions they were visiting in Lee County, beaches received the highest level of mentions (86%).

- Less then half of spring visitors took a day trip outside of Lee County (41%), with most visiting Naples (27%).

- Visitors continue to be highly satisfied with their stay in Lee County, with the majority of spring 2018 visitors indicating they were either *very satisfied* or *satisfied* with their visit (58% and 36% respectively). For most spring visitors, their positive experiences in the destination foster an intent to return – nine in ten said they are likely to visit Lee County again (90%), and more than half of them said they will return next year (53%). Many visitors also said they will spread the word about their positive experiences, with 91% claiming to recommend Lee County over other areas in Florida.

- When asked what they liked least about the area, one in four spring visitors cited *traffic* (24%). *Insects* (14% - slight decrease from last year's 17%), *beach seaweed* (13%), *red tide* (13% - an increase from 3% last year), and *weather* (12% - an increase from 3% last year), were all mentioned by more than one in ten spring visitors.

- The demographic composition of spring 2018 visitors can be summarized as follows:

    - 51 years of age on average
    - $105,000 household income on average
    - 75% married
    - 37% traveling as a couple
    - 38% traveling as a family
    - 65% traveling *without* children (down from 72% in 2017)
    - 3-4 people in travel party on average

Lodging Industry Assessments

- For the Lee County lodging industry in total, *available* room nights rose 3.4% from spring 2017 to 2018 and *occupied* room nights saw a 9.9% increase year-over-year. RV parks/campgrounds and hotel/motel/resort/B&B properties experienced growth in both *available* (6.6% and 3% respectively) and *occupied* room nights (45.5% and 4.8% respectively) while condo/vacation homes were on par with last spring (-0.7% *occupied* and 0.4% *available* room nights).

Spring Season	Occupied Room Nights			Available Room Nights		
	2017	2018	% Change	2017	2018	% Change
Hotel/Motel/Resort/B&B	713,185	747,265	4.8%	1,016,476	1,046,611	3.0%
Condo/Cottage/Vacation Home	275,002	273,161	-0.7%	384,495	385,972	0.4%
RV Park/Campground	183,298	266,612	45.5%	497,937	530,897	6.6%
Total	**1,171,485**	**1,287,038**	**9.9%**	**1,898,908**	**1,963,480**	**3.4%**

- The result was a 6.2% increase in the Lee County industry-wide average occupancy rate (61.7% in spring 2017 to 65.5% in spring 2018). The RV park/campground category posted the most significant increase (50.2% vs. 36.8% in 2017).

- In contrast, average daily rate decreased from spring 2017 to 2018 ($149.73 to $138.26). This ADR decrease was seen mostly in the hotel/motel/resort (-4.5%) and condo/vacation home categories (-3.3%).

- Spring season RevPAR experienced a 1.9% decrease from 2017 to 2018. While RV park/campground experienced a significant increase in RevPAR (44.7%), condo/cottage/vacation homes and hotel/motel/resorts both saw year-over-year declines in RevPAR due to their drops in ADR (-4.3% and -2.8% respectively).

Spring Season	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2017	2018	% Change	2017	2018	% Change	2017	2018	% Change
Hotel/Motel/Resort/B&B	70.2%	71.4%	1.7%	$155.03	$148.11	-4.5%	$108.77	$105.75	-2.8%
Condo/Cottage/Vacation Home	71.5%	70.8%	-1.0%	$204.71	$197.98	-3.3%	$146.41	$140.12	-4.3%
RV Park/Campground	36.8%	50.2%	36.4%	$46.64	$49.46	6.0%	$17.17	$24.84	44.7%
AVERAGE	**61.7%**	**65.5%**	**6.2%**	**$149.73**	**$138.26**	**-7.7%**	**$92.37**	**$90.63**	**-1.9%**

- According to reports from Lee County property managers, reservations for the upcoming summer season (July, August, and September) suggest business will be stronger than last summer. Three out of ten responding managers reported that their total reservations for the next three months are *up* over the same period last year (34% vs. 23% in 2017), and one-third said reservations are the *same* (33% vs. 33% in 2017). The remaining property managers claimed that their reservations are *down* compared to last summer (25% vs. 36% in 2017).

Spring 2018 Lee County Snapshot

Total Visitation

Spring Season	% 2017	% 2018	Visitor Estimates 2017	Visitor Estimates 2018
Paid Accommodations	64%	64%	853,367	865,503
Friends/Relatives	36%	36%	476,082	479,694
Total Visitation			**1,329,449**	**1,345,197**

Visitor Origin - Visitors Staying in Paid Accommodations

Spring Season	% 2017	% 2018	Visitor Estimates 2017	Visitor Estimates 2018
Florida	8%	11%	53,711	78,047
United States	79%	84%	677,585	728,439
Canada	7%	3%	63,101	29,261
Germany	7%	7%	61,599	60,062
UK	2%	2%	19,531	16,940
Other International	4%	4%	51,081	30,801

Total Visitor Expenditures

Spring Season	2017	2018	% Change
Total Visitor Expenditures	$728,035,018	$755,450,385	3.8%
Paid Accommodations	$500,090,495	$526,702,281	5.3%

First-Time/Repeat Visitors to Lee County

Spring Season	2017	2018
First-time	27%	19%
Repeat	70%	79%

Spring Season	Average Occupancy Rate 2017	2018	% Change	Average Daily Rate 2017	2018	% Change	RevPAR 2017	2018	% Change
Hotel/Motel/Resort/B&B	70.2%	71.4%	1.7%	$155.03	$148.11	-4.5%	$108.77	$105.75	-2.8%
Condo/Cottage/Vacation Home	71.5%	70.8%	-1.0%	$204.71	$197.98	-3.3%	$146.41	$140.12	-4.3%
RV Park/Campground	36.8%	50.2%	36.4%	$46.64	$49.46	6.0%	$17.17	$24.84	44.7%
AVERAGE	**61.7%**	**65.5%**	**6.2%**	**$149.73**	**$138.26**	**-7.7%**	**$92.37**	**$90.63**	**-1.9%**

Calendar YTD 2018 (Jan-Jun) Lee County Snapshot

Total Calendar Year Visitation

	%		Visitor Estimates	
	2017	2018	2017	2018
Paid Accommodations	60%	61%	1,581,576	1,654,773
Friends/Relatives	40%	39%	1,071,114	1,057,509
Total Visitation			**2,652,690**	**2,712,282**

Total Visitor Expenditures

	2017	2018	% Change
Total Visitor Expenditures	$1,875,368,027	$1,947,432,439	3.8%
Paid Accommodations	$1,352,055,380	$1,414,796,436	4.6%

Visitor Origin - Visitors Staying in Paid Accommodations

	%		Visitor Estimates	
	2017	2018	2017	2018
Florida	4%	6%	52,124	81,619
US	81%	88%	1,279,727	1,452,443
Canada	10%	5%	153,011	82,377
Germany	5%	4%	76,505	66,480
UK	2%	1%	31,993	15,897
Other International	3%	2%	40,339	37,576

First-Time/Repeat Visitors to Lee County

	2017	2018
First-time	26%	17%
Repeat	72%	81%

	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2017	2018	% Change	2017	2018	% Change	2017	2018	% Change
Hotel/Motel/Resort/B&B	76.3%	79.3%	3.9%	$181.27	$183.10	1.0%	$138.26	$145.14	5.0%
Condo/Cottage/Vacation Home	81.1%	77.7%	-4.3%	$237.90	$219.81	-7.6%	$192.99	$170.72	-11.5%
RV Park/Campground	66.4%	73.4%	10.6%	$60.84	$56.40	-7.3%	$40.41	$41.43	2.5%
AVERAGE	**74.6%**	**77.4%**	**3.7%**	**$165.26**	**$158.13**	**-4.3%**	**$123.34**	**$122.33**	**-0.8%**

* Although Average Daily Rates are up slightly for each property category, a significant increase in RV Park/Campground occupied site nights has increased the relative weight of this lower category ADR. This results in the overall Average Daily Rate showing a slight decrease.

Visitor Profile Analysis
Spring 2018

A total of 968 interviews were conducted with visitors in Lee County during the spring months of April, May, and June 2018. A total sample of this size is considered accurate to plus or minus 3.2 percentage points at the 95% confidence level.
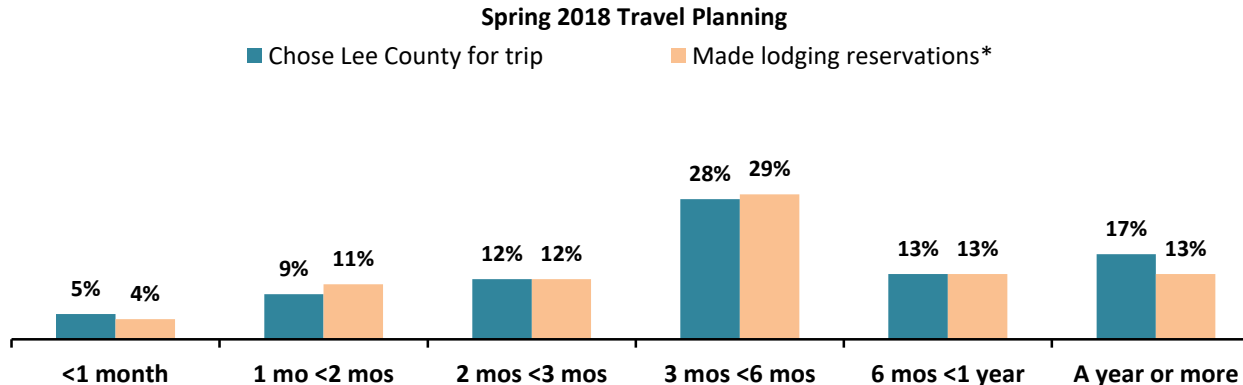
A total of 940 interviews were conducted with visitors in Lee County during the spring months of April, May, and June 2017. A total sample of this size is considered accurate to plus or minus 3.2 percentage points at the 95% confidence level.

dpa
Davidson Peterson
Associates

Travel Planning

Spring Season	Chose Lee County for Trip		Made Lodging Reservations*	
	2017	2018	2017	2018
	A	B	A	B
Total Respondents	**940**	**968**	**578***	**567***
<u>Less than 3 months (NET)</u>	<u>27%</u>	<u>26%</u>	<u>37% b</u>	<u>28%</u>
<1 month	5%	5%	9% b	4%
1 month - <2 months	11%	9%	13%	11%
2 months - <3 months	12%	12%	15%	12%
<u>3 months or more (NET)</u>	<u>66% b</u>	<u>58%</u>	<u>58%</u>	<u>55%</u>
3 months - <6 months	35% b	28%	35% b	29%
6 months - <1 year	15%	13%	15%	13%
A year or more	16%	17%	8%	13% a
No Lodging Reservations Made	-	-	3%	4%
No Answer	6%	14% a	2%	10% a

Q4: When did you choose Lee County for this trip?
Q5. When did you make lodging reservations for this trip?

Spring 2018 Travel Planning

■ Chose Lee County for trip   ■ Made lodging reservations*

	<1 month	1 mo <2 mos	2 mos <3 mos	3 mos <6 mos	6 mos <1 year	A year or more
Chose Lee County for trip	5%	9%	12%	28%	13%	17%
Made lodging reservations*	4%	11%	12%	29%	13%	13%

* Base: Among those staying in paid accommodations

Travel Planning

Considered Other Destinations

	2018*
Spring Season	
Total Respondents	**968**
Yes	17%
No	82%
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
Spring Season	**A**	**B**
Total Respondents	**940**	**968**
Visited web sites (NET)	86% b	77%
Airline websites	44% b	31%
Search Engines	29% b	24%
Trip Advisor	21%	20%
Hotel websites	24% b	19%
Booking websites	24% b	19%
Vacation rental websites	23% b	15%
AirBnB,VRBO,Homeaway, or similar website	7%	15% a
www.FortMyers-Sanibel.com	11%	11%
Facebook	8%	8%
Visit Florida	8%	8%
Other	10%	8%
None/Didn't visit websites	12%	21% a
No Answer	2%	2%

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**
Spring Season	**A**	**B**
Total Respondents	**940**	**968**
Requested information (NET)	17%	19%
Call hotel/motel/condo	6%	6%
Visitor Guide	3%	4%
E-Newsletter	1%	2% a
Call VCB	<1%	1%
Call local Chamber of Commerce	<1%	1%
Other	8%	8%
None/Did not request information	63%	79% a
No Answer	7% b	2%

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**
Spring Season	**A**	**B**
Total Respondents	**940**	**968**
Yes	37%	44% a
No	43%	39%
Can't Recall	19%	16%

Q9: Over the past six months, have you seen, read or heard any travel stories, advertising or promotions for the Lee County area?
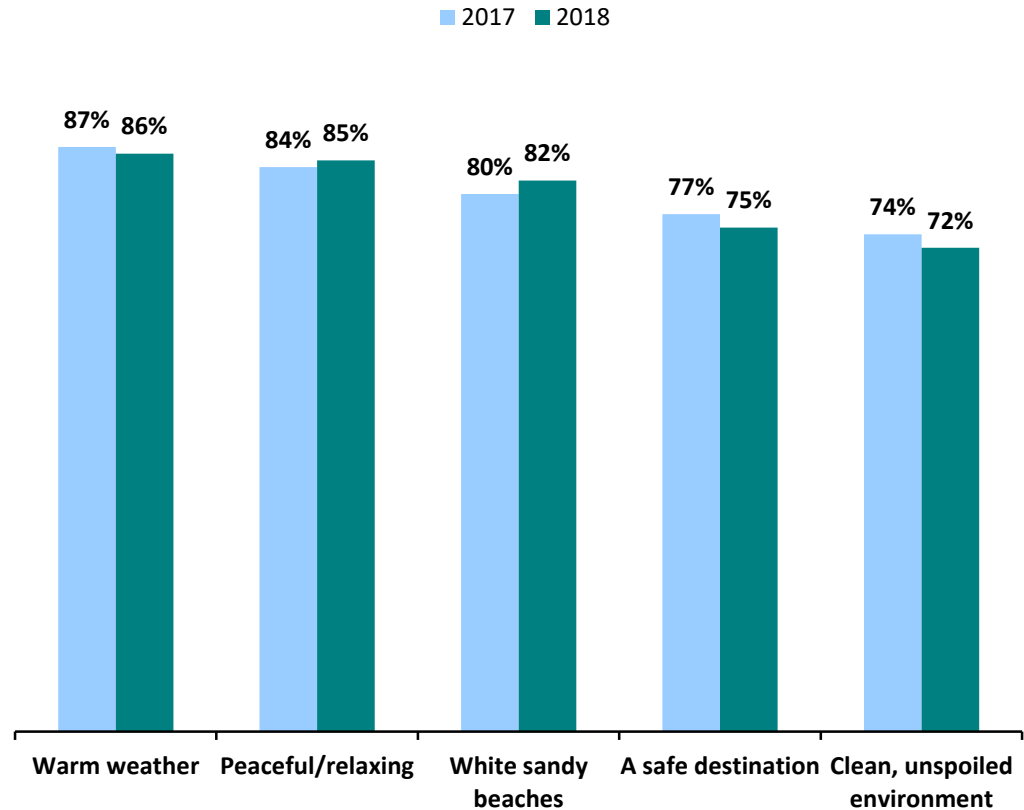
Recall of Lee County Promotions

Travel Planning
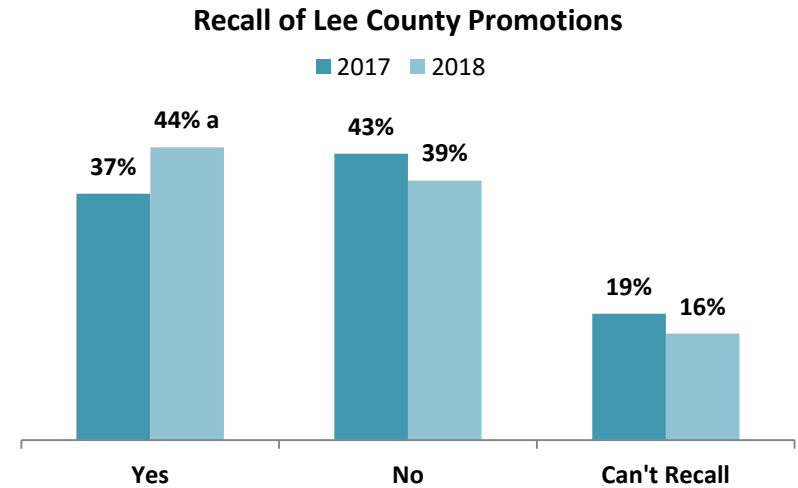
Top Travel Decisions Influences*

Travel Decision Influences*		
Spring Season	**2017**	**2018**
	A	**B**
Total Respondents	**940**	**968**
Warm weather	87%	86%
Peaceful/relaxing	84%	85%
White sandy beaches	80%	82%
A safe destination	77%	75%
Clean, unspoiled environment	74%	72%
Convenient location	71%	68%
Overall value for the money	66%	63%
A "family" atmosphere	53%	61% a
Plenty to see and do	65% b	59%
Reasonably priced lodging	58% b	53%

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*

■ 2017 ■ 2018

	Warm weather	Peaceful/relaxing	White sandy beaches	A safe destination	Clean, unspoiled environment
2017	87%	84%	80%	77%	74%
2018	86%	85%	82%	75%	72%

dpa
Davidson Peterson
Associates

Trip Profile

Mode of Transportation		
Spring Season	**2017**	**2018**
	A	**B**
Total Respondents	**940**	**968**
Fly	78%	77%
Drive a personal vehicle	18%	19%
Drive a rental vehicle	3%	2%
Drive an RV	<1%	1%
Travel by bus	--	0%
Other/No Answer	<1%	<1%

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

Frequency of Using SWFL Int'l (Past Year)		
Spring Season	**2017**	**2018**
Total Respondents	**940**	**968**
One or more trips	62%	60%
1 trip	43% b	35%
2 to 3 trips	15%	19% a
4 to 5 trips	3%	3%
6 or more trips	2%	2%
None/No Answer	38%	40%

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		
Spring Season	**2017**	**2018**
	A	**B**
Respondents who flew	**736**	**744**
SW Florida Int'l (Fort Myers)	84% b	79%
Punta Gorda	5%	10% a
Miami Int'l	3%	3%
Tampa Int'l	2%	3%
Orlando Int'l	2%	2%
Ft. Lauderdale Int'l	2%	2%
Other/No Answer	2%	1%

Q2: At which Florida airport did you land?

Trip Profile

Trip Length Mean # of Nights		
Spring Season	**2017**	**2018**
	A	**B**
Total Respondents	**940**	**968**
# of Nights Intend to Stay	9.0	10.4 a
# of Nights Already Spent	6.2	7.5 a

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)
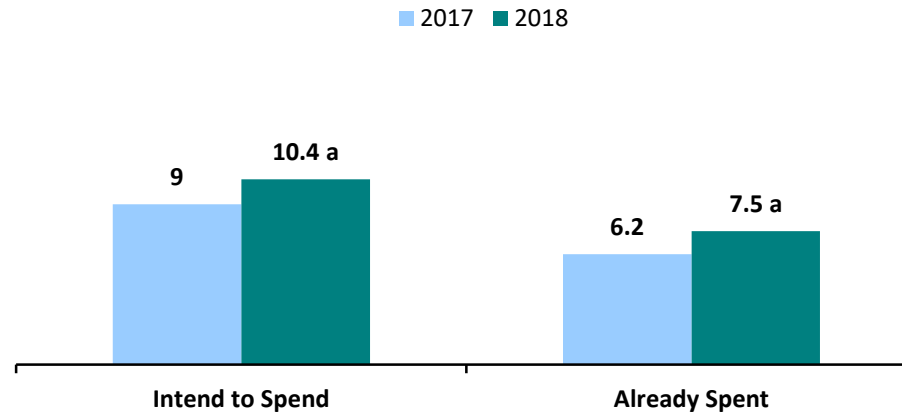
Trip Profile

Reason(s) for Visit		
Spring Season	**2017**	**2018**
	A	**B**
Total Respondents	**940**	**968**
A Vacation	89% b	84%
Visiting Friends/Relatives	31%	35%
Sporting Event(s)	1%	4% a
Personal Business	1%	2%
A Conference/Meeting	1%	1%
Other Business Trip	1%	1%
A Convention/Trade Show	1%	1%
Other/No Answer (NET)	2%	4%

Q11: Did you come to our area for…(Please mark all that apply.)

Reason for Visit
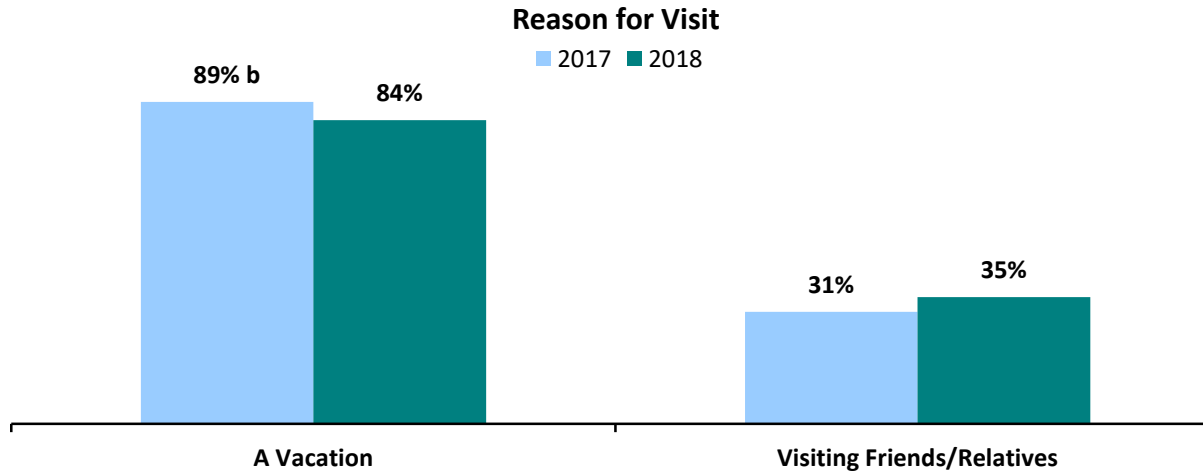
Trip Profile

First Time Visitors to Lee County

Spring Season	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
Total Respondents	**940**	**968**	**30***	**57***	**534**	**758**	**165**	**138**
First-time visitor	27% b	19%	13%	20%	24%	20%	34%	18%
Repeat visitor	70%	79% b	83%	80%	76%	79%	60%	80%
No Answer	2%	2%	4%	--	1%	1%	6%	2%

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

Spring Season	2017	2018
Total Respondents	**940**	**968**
	A	B
Yes, first-time visitor	10% b	4%
No	84%	87% a
No answer	2%	3%
*FL Residents**	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
■ 2017 ■ 2018

	To Florida	To Lee County
2017	10%	27% b
2018	4%	19%
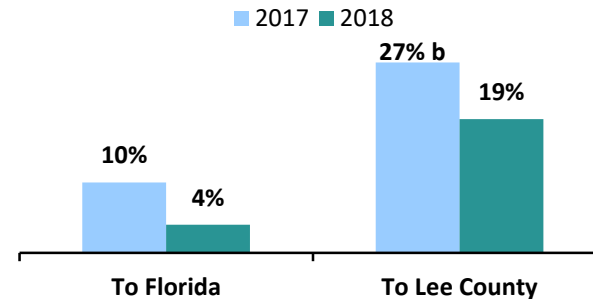
Previous Visits in Five Years

Spring Season	Mean # of Visits to Lee County	
	2017	2018
	A	B
Base: Repeat Visitors	662	765
Number of visits	4.9	6.3 a

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

Trip Profile

Type of Accommodations Used		
Spring Season	**2017**	**2018**
	A	**B**
Total respondents staying in paid accommodations	**578**	**567**
<u>**Hotel/Motel/Resort/B&B (NET)**</u>	<u>64% a</u>	<u>51%</u>
At a hotel/motel/historic inn	36%	37%
At a resort	28%	14%
At a Bed and Breakfast	<1%	1%
Condo/Cottage/Vacation Home/Timeshare (NET)	35%	47% a
RV Park/Campground (NET)	1%	2%

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

Type of Accommodations Used
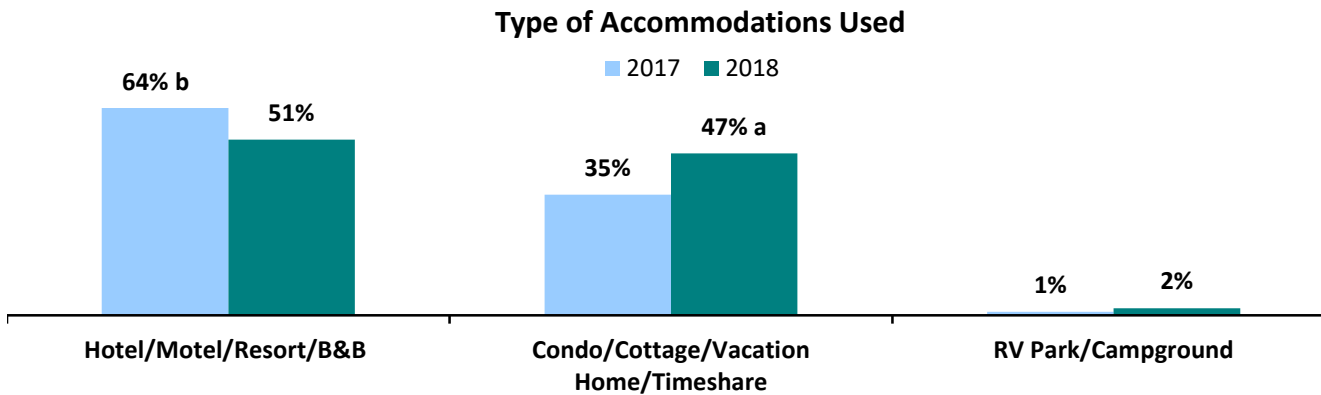
Trip Profile

Community Staying In		
Spring Season	2017	2018
	A	B
Total respondents	**940**	**968**
Sanibel Island	25%	27%
Fort Myers Beach	24%	22%
Fort Myers	15%	17%
Cape Coral	12%	13%
Bonita Springs	5%	4%
North Fort Myers	3%	3%
Estero	3%	3%
Captiva Island	2%	2%
Lehigh Acres	1%	1%
Boca Grande / outer islands	--	1%
Pine Island	--	<1%
None/not staying overnight	4%	3%
No Answer	7%	6%

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

Community Staying In				
Spring Season	2017		2018	
Accommodations:	Paid	Unpaid	Paid	Unpaid
	A	B	C	D
Total respondents	**578**	**330**	**567**	**366**
Sanibel Island	34% b	11%	37% d	11%
Fort Myers Beach	28% b	18%	26% d	18%
Fort Myers	9%	26% a	10%	28% c
Cape Coral	11%	15%	11%	15%
Bonita Springs	4%	7%	3%	6% c
North Fort Myers	1%	5% a	1%	6% c
Estero	2%	4%	2%	4%
Captiva Island	3%	1%	2%	1%
Lehigh Acres	--	2%	--	2%
Boca Grande / outer islands	<1%	<1%	<1%	1%
Pine Island	--	<1%	--	<1%
None/not staying overnight	1%	2% a	2%	2%
No Answer	6%	9%	6%	6%

Trip Profile

Quality of Accommodations		
Spring Season	**2017**	**2018**
	A	**B**
Total respondents staying in paid accommodations	**578**	**567**
Far exceeded/Exceeded expectations	39%	41%
Met your expectations	55%	52%
Did not meet/Far below expectations	3%	3%
No Answer	4%	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**	
Spring Season	**2017**	**2018**	**2017**	**2018**	**2017**	**2018**	**2017**	**2018**
	A	**B**	**A**	**B**	**A**	**B**	**A**	**B**
Total respondents staying in paid accommodations	**181**	**132**	**383**	**426**	**451**	**814**	**117**	**138**
Far exceeded/Exceeded expectations	34%	42%	43%	41%	42%	47%	30%	46% a
Met your expectations	57%	54%	52%	52%	53% b	44%	62% b	40%
Did not meet/Far below expectations	3%	3%	3%	4%	3%	2%	2%	4%
No Answer	5%	1%	3%	3%	2%	7% a	6%	10%

Trip Activities

| Activities Enjoyed		
Spring Season	**2017**	**2018**
	A	**B**
Total Respondents	**940**	**968**
Beaches	96% b	94%
Relaxing	71%	75%
Dining Out	76%	74%
Swimming	65%	62%
Shopping	60%	56%
Shelling	35%	37%
Sightseeing	33%	36%
Visiting friends/relatives	33%	35%
Watching wildlife	26%	24%
Attractions	18%	20%
Bicycle riding	22%	19%
Bars/nightlife	15%	18%
Photography	21% b	17%
Exercise/working out	15%	14%
Boating	12%	14%
Birdwatching	11%	13%
Fishing	11%	13%
Golfing	15% b	11%
Kayaking/canoeing	11%	10%
Miniature golf	9%	7%
Parasailing/jet skiing	5%	6%
Guided tour	5%	6%
Sporting event	2%	5% a
Cultural events	3%	3%
Tennis	2%	3%
Scuba diving/snorkeling	2%	3%
Other	3%	3%
No Answer	1%	1%
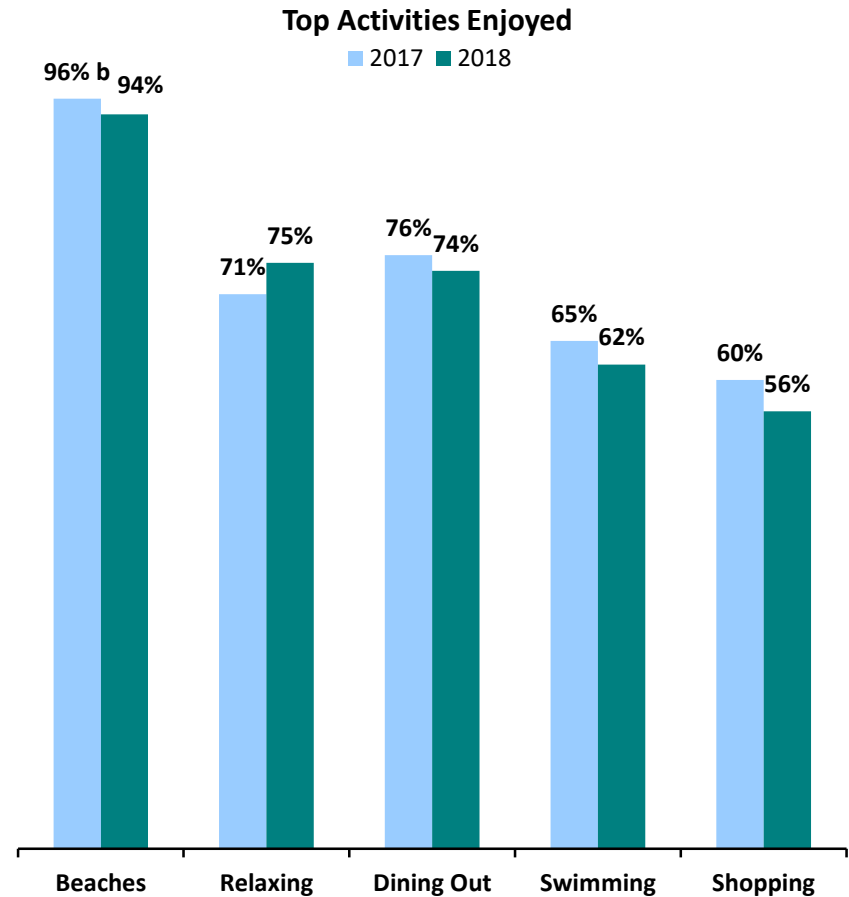
Q23: What activities or interests are you enjoying while in Lee County?
(Please mark ALL that apply.)

Top Activities Enjoyed
2017 ■ 2018

	Beaches	Relaxing	Dining Out	Swimming	Shopping
2017	96% b	71%	76%	65%	60%
2018	94%	75%	74%	62%	56%

Trip Activities

Attractions Visited		
Spring Season	**2017**	**2018**
	A	**B**
Total Respondents	**940**	**968**
Beaches	88%	86%
Fort Myers Beach Pier	47%	45%
Sanibel Lighthouse	24%	31% a
Miromar Outlets Mall	31%	27%
Sanibel Outlets	23%	26%
Edison/Ford Estates	28% b	23%
Ding Darling National Wildlife Refuge	16%	17%
Periwinkle Place	12%	15%
Bell Tower Shops	10%	12%
Coconut Point Mall	8%	10%
Gulf Coast Town Center	7%	9%
Shell Factory and Nature Park	8%	7%
Manatee Park	3%	4%
Bailey-Matthews Shell Museum	3%	2%
Broadway Palm Dinner Theater	1%	2% a
Barbara B. Mann Performing Arts Hall	1%	1%
Other	5%	5%
None/No Answer (NET)	5%	7%

Q24. On this trip, which attractions are you visiting? *(Please mark ALL that apply.)*
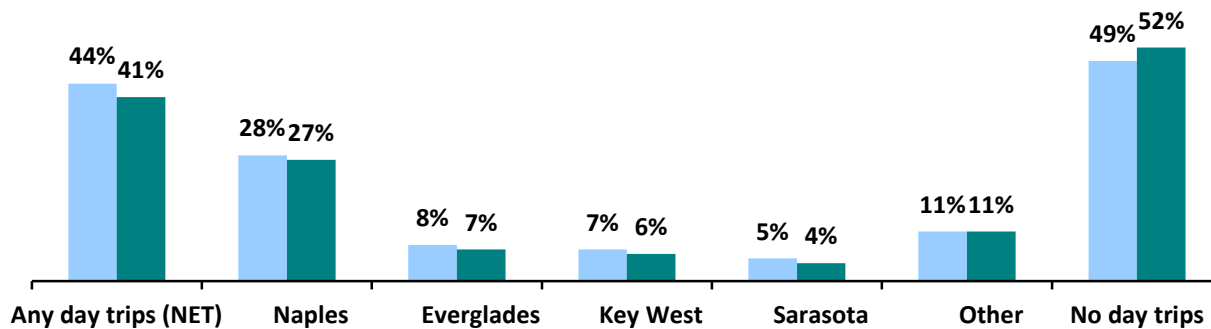
Top Attractions Visited
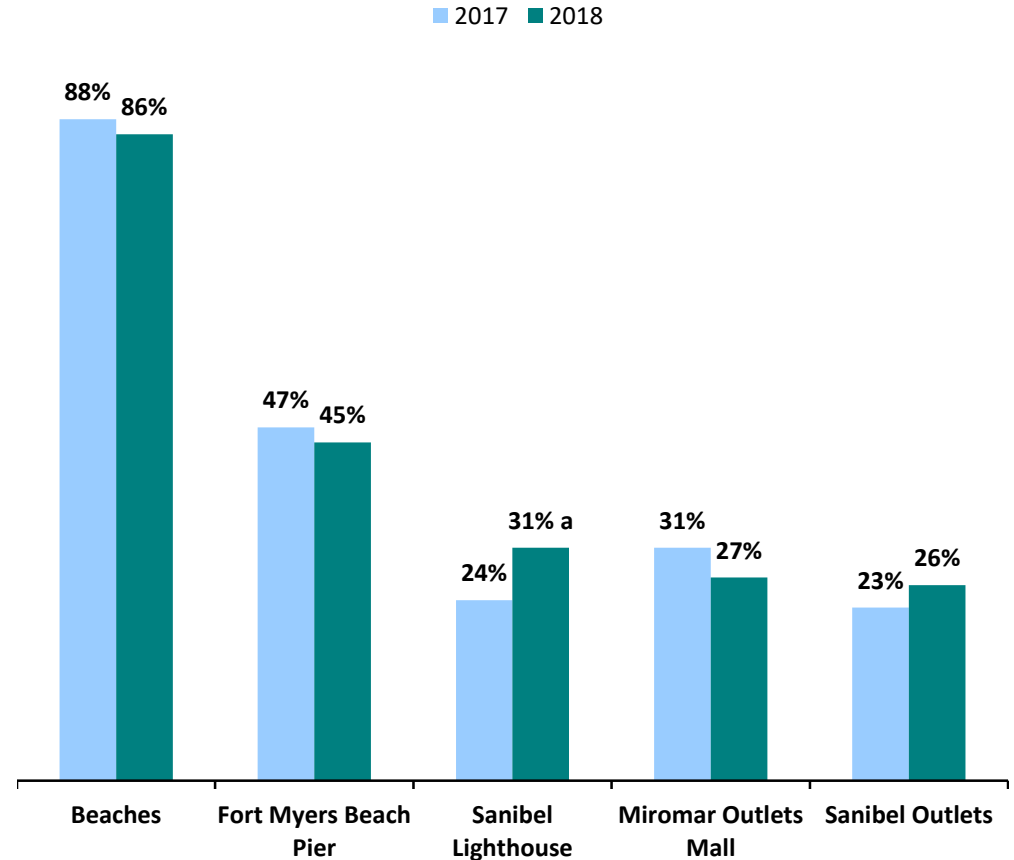
■ 2017 ■ 2018

Trip Activities

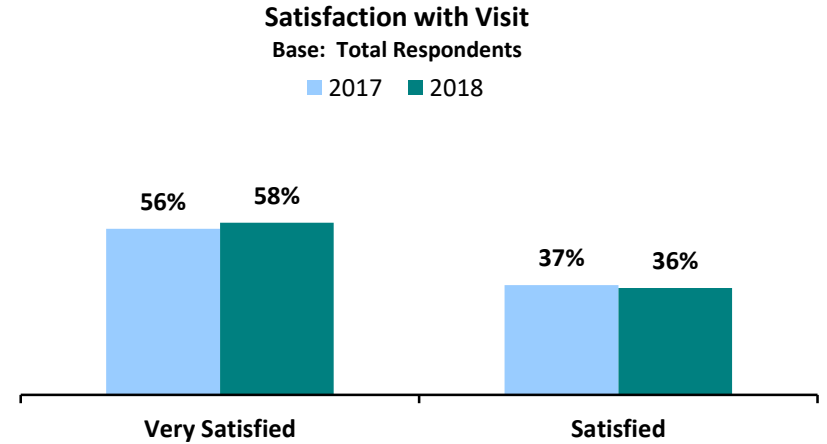| Day Trips Outside Lee County		
Spring Season	**2017**	**2018**
	A	**B**
Total Respondents	**940**	**968**
Any day trips (NET)	44%	41%
Naples	28%	27%
Everglades	8%	7%
Key West	7%	6%
Sarasota	5%	4%
Other	11%	11%
No day trips	49%	52%
No Answer	6%	7%

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

Day Trips Outside Lee County

■ 2017 ■ 2018

Lee County Experience

Satisfaction with Visit

Spring Season	Total Respondents 2017	2018
	A	B
Total Respondents	940	968
Very Satisfied/Satisfied	93%	95%
Very Satisfied	56%	58%
Satisfied	37%	36%
Neither	1%	1%
Dissatisfied/Very Dissatisfied	<1%	1%
Don't know/no answer	5%	4%

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

Satisfaction with Visit
Base: Total Respondents
■ 2017 ■ 2018

	Very Satisfied	Satisfied
2017	56%	37%
2018	58%	36%

Ratings by Subgroup

Spring Season	First-Timers 2017	2018	Repeaters 2017	2018	U.S. Residents 2017	2018	International Residents 2017	2018
	A	B	A	B	A	B	A	B
Total Respondents	257	187	662	765	759	814	165	138
Very Satisfied/Satisfied	90%	94%	94%	95%	94%	95%	91%	96%
Very Satisfied	37%	52% a	65%	60%	59%	59%	45%	57%
Satisfied	52% b	42%	30%	35% a	34%	36%	46%	39%

Lee County Experience

Satisfaction with Customer Service

Winter Season	2018*
Total Respondents	**968**
<u>Very Satisfied/Satisfied</u>	<u>86%</u>
Very Satisfied	*43%*
Satisfied	*43%*
Neither	*4%*
Dissatisfied/Very Dissatisfied	*<1%*
Don't know/no answer	*10%*
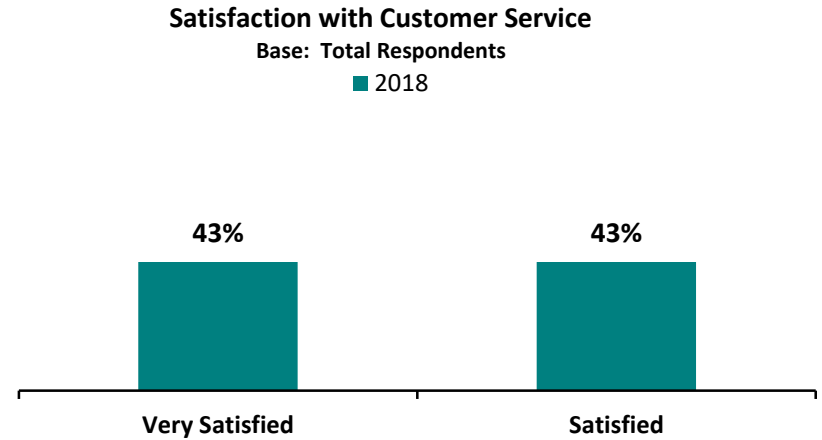
Q29: How satisfied are you with the customer service you received while visiting Lee County?
This question was added in January 2018, so prior year (2017) data is not available.

Satisfaction with Customer Service
Base: Total Respondents
■ 2018

Ratings by Subgroup

	First-Timers	Repeaters	U.S. Residents	International Residents
Winter Season	**2018**	**2018**	**2018**	**2018**
Total Respondents	**187**	**765**	**814**	**138**
<u>Very Satisfied/Satisfied</u>	<u>82%</u>	<u>87%</u>	<u>86%</u>	<u>87%</u>
Very Satisfied	46%	43%	44%	39%
Satisfied	36%	44%	42%	48%

Future Plans

Likelihood to Recommend/Return to Lee County		
Spring Season	**2017**	**2018**
	A	**B**
Total Respondents	**940**	**968**
Likely to Recommend Lee County	90%	91%
Likely to Return to Lee County	90%	90%
Base: Total Respondents Planning to Return	**848**	**873**
Likely to Return Next Year	57%	53%

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**	
Spring Season	**2017**	**2018**	**2017**	**2018**	**2017**	**2018**	**2017**	**2018**
	A	**B**	**A**	**B**	**A**	**B**	**A**	**B**
Total Respondents	**257**	**187**	**662**	**765**	**759**	**814**	**165**	**138**
Likely to Recommend Lee County	85%	87%	92%	92%	90%	90%	93%	94%
Likely to Return to Lee County	81%	79%	94%	93%	91%	92%	88%	86%
Base: Total Respondents Planning to Return	**207**	**149**	**620**	**712**	**690**	**748**	**146**	**118**
Likely to Return Next Year	34%	36%	64% b	57%	58%	52%	51%	60% a

Trip Experience

| Least Liked Features		
Spring Season	**2017**	**2018**
	A	**B**
Total Respondents	**940**	**968**
Traffic	22%	24%
Insects	17% b	14%
Beach seaweed	13%	13%
Red Tide	3%	13% a
Weather	9%	12% a
High prices	9%	9%
Water quality	6%	9%
Lack of nightlife	5%	4%
Quality of accommodations	1%	3% a
Other	5%	6%
Nothing/No Answer (NET)	40% b	35%

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

Least Liked Features

■ 2017 ■ 2018

- Traffic: 22%, 24%
- Insects: 17% b, 14%
- Beach seaweed: 13%, 13%
- Red Tide: 3%, 13% a
- Weather: 9%, 12% a
- High prices: 9%, 9%
- Water quality: 6%, 9%
- Lack of nightlife: 5%, 4%
- Quality of accommodations: 1%, 3% a
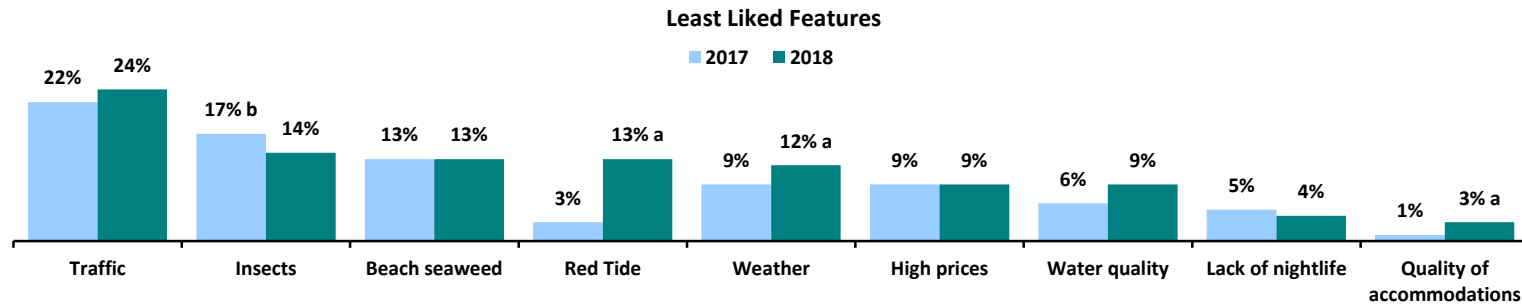
Trip Experience

Perception of Lee County as Expensive		
Spring Season	**2017**	**2018**
	A	**B**
Total Respondents	**940**	**968**
More Expensive	11%	11%
Less Expensive	3%	4%
As Expected	82%	79%
Don't know/No Answer (NET)	5%	5%

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

■ 2017 ■ 2018

dpa
Davidson Peterson
Associates
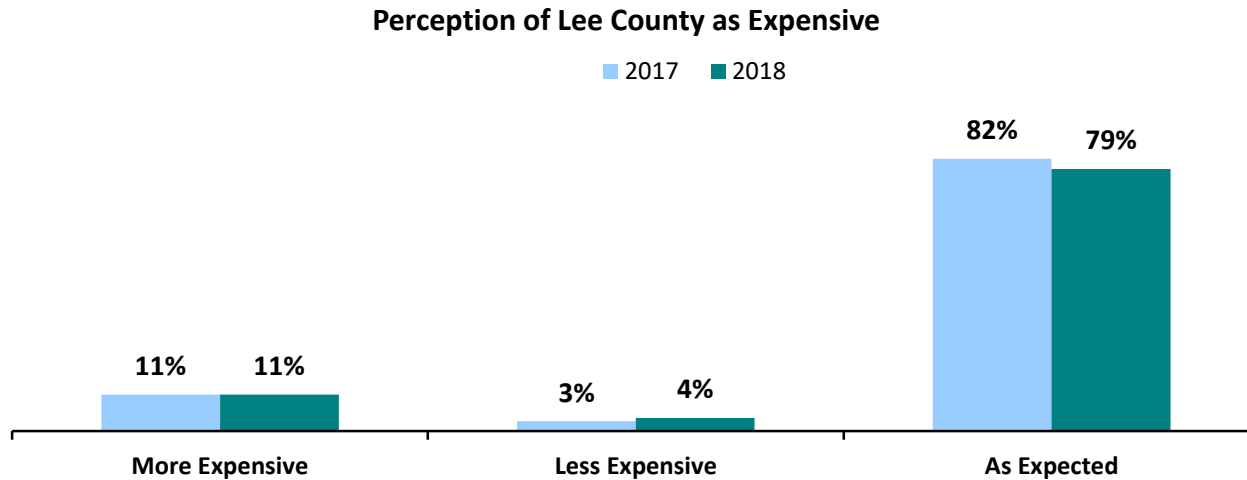
Visitor and Travel Party Demographic Profile

Visitor Demographic Profile

Spring Season	2017	2018
	A	B
Total Respondents	**940**	**968**
Age of respondent (mean)	50.1	51.4
Annual household income (mean)	$102,800	$105,300
Marital Status		
Married	72%	75%
Single	13%	13%

Q35: What is your age, please?
Q37: What is your total annual household income before taxes?
Q34. Are you: Married/Single/Other

Travel Party

Spring Season	2017	2018
	A	B
Total Respondents	**940**	**968**
Family	40%	38%
Couple	37%	37%
Group of couples/friends	13%	13%
Single	6%	8%
Mean travel party size	3.3	3.5
Mean adults in travel party	2.7	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

Spring Season	2017	2018
	A	B
Total Respondents	**940**	**968**
Traveling with any Children (net)	28%	32% a
Any younger than 6	13%	17% a
Any ages 6-11	14%	15%
Any 12-17 years old	12%	14%
No Children	72% b	65%

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

Spring Season	%		Visitor Estimates		
	2017	2018	2017	2018	% Change
Paid Accommodations	64%	64%	853,367	865,503	+ 1.4%
Friends/Relatives	36%	36%	476,082	479,694	+ 0.8%
Total Visitation			**1,329,449**	**1,345,197**	**+ 1.2%**

Visitor Origin (Paid Accommodation Guests)

Spring Season	%		Visitor Estimates		
Country of Origin	2017	2018	2017	2018	Direction of Change
United States	79%	84%	677,585	728,439	+
Germany	7%	7%	61,599	60,062	-
Canada	7%	3%	63,101	29,261	-
UK	2%	2%	19,531	16,940	-
Scandinavia	1%	1%	28,546	9,240	-
Latin America	1%	1%	1,502	4,620	+
France	1%	<1%	1,502	1,540	+
Other International	2%	2%	19,531	15,400	-

U.S. Region of Origin	2017	2018	2017	2018	Direction of Change
Florida	8%	11%	53,711	78,047	+
South (including Florida)	25%	31%	167,331	228,566	+
Midwest	46%	39%	309,871	282,456	-
Northeast	25%	25%	171,462	182,110	+
West	4%	5%	28,921	35,307	+

Spring 2018 Top DMAs (Paid Accommodations)

Boston (Manchester, NH)	7%	53,890
Chicago	6%	40,882
New York	5%	33,449
Tampa-Saint Petersburg (Sarasota)	5%	33,449
Cleveland-Akron (Canton)	4%	31,590
Miami-Fort Lauderdale	3%	24,157
Indianapolis	3%	24,157
Milwaukee	3%	22,299
Minneapolis-Saint Paul	3%	22,299
Detroit	3%	20,441

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 the 2018 percentages.

Occupancy Data Analysis

Spring 2018

For the 2018 spring season, property managers were interviewed in July 2018 to provide data for each specific month of the season (April, May, and June 2018).

For the 2017 spring season, property managers were interviewed in July 2017 to provide data for each specific month of the season (April, May, and June 2017).
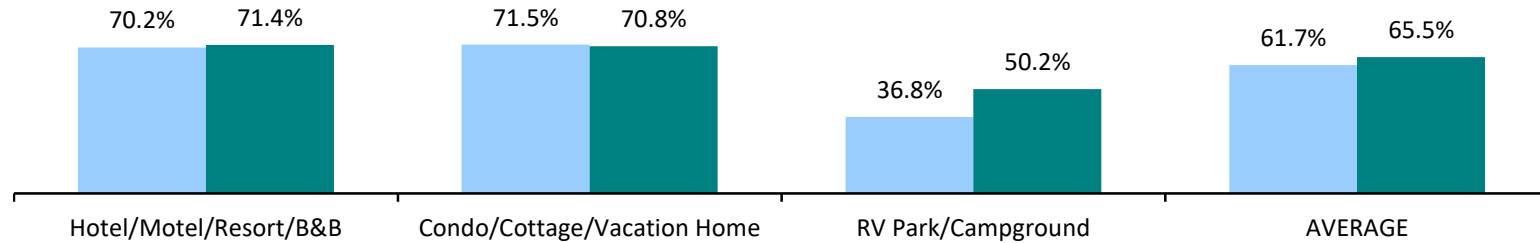
Occupancy/Daily Rates

Spring Season	Average Occupancy Rate			Average Daily Rate			RevPAR		
	2017	2018	% Change	2017	2018	% Change	2017	2018	% Change
Hotel/Motel/Resort/B&B	70.2%	71.4%	1.7%	$155.03	$148.11	-4.5%	$108.77	$105.75	-2.8%
Condo/Cottage/Vacation Home	71.5%	70.8%	-1.0%	$204.71	$197.98	-3.3%	$146.41	$140.12	-4.3%
RV Park/Campground	36.8%	50.2%	36.4%	$46.64	$49.46	6.0%	$17.17	$24.84	44.7%
AVERAGE	**61.7%**	**65.5%**	**6.2%**	**$149.73**	**$138.26**	**-7.7%**	**$92.37**	**$90.63**	**-1.9%**

Q16: What was your overall average occupancy rate for the month of [April/May/June]?
Q17: What was your average daily rate (ADR) in [April/May/June]?

Average Occupancy Rate

Average Daily Rate
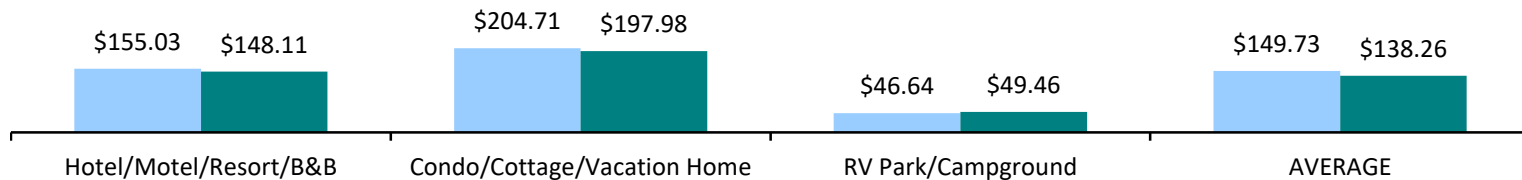
Room/Unit/Site Nights

Spring Season	Occupied Room Nights			Available Room Nights		
	2017	2018	% Change	2017	2018	% Change
Hotel/Motel/Resort/B&B	713,185	747,265	4.8%	1,016,476	1,046,611	3.0%
Condo/Cottage/Vacation Home	275,002	273,161	-0.7%	384,495	385,972	0.4%
RV Park/Campground	183,298	266,612	45.5%	497,937	530,897	6.6%
Total	**1,171,485**	**1,287,038**	**9.9%**	**1,898,908**	**1,963,480**	**3.4%**

Occupied Room Nights

■ 2017 ■ 2018

713,185 747,265
275,002 273,161
183,298 266,612

Hotel/Motel/Resort/B&B   Condo/Cottage/Vacation Home   RV Park/Campground

Available Room Nights

■ 2017 ■ 2018

1,016,476 1,046,611
384,495 385,972
497,937 530,897

Hotel/Motel/Resort/B&B   Condo/Cottage/Vacation Home   RV Park/Campground
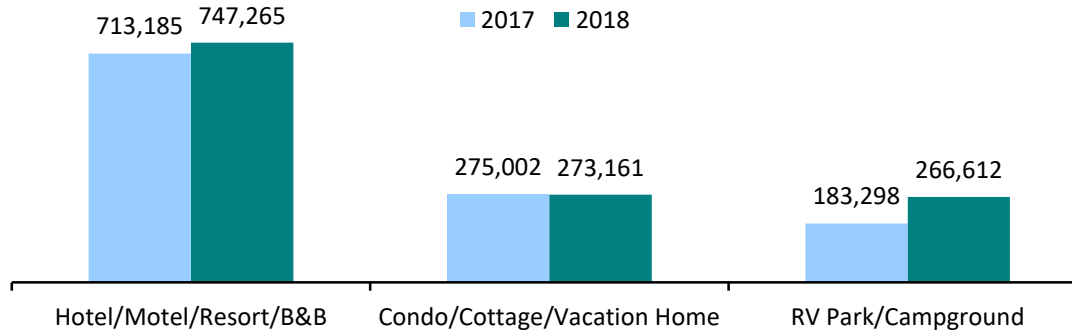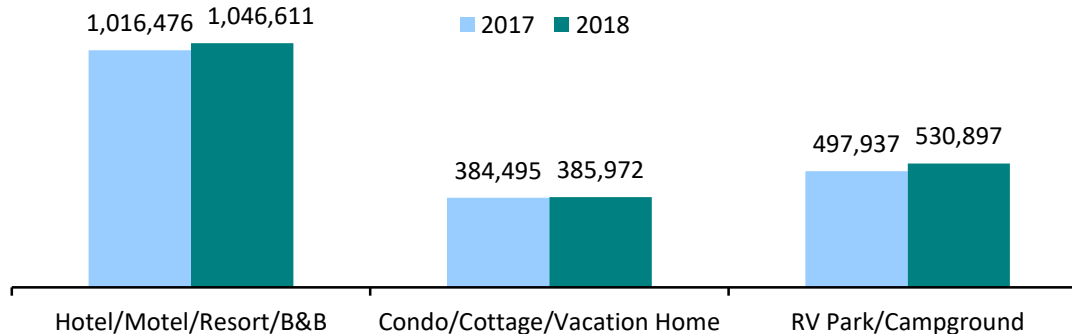
Average Party Size and Length of Stay

Spring Season	Average Party Size			Average Length of Stay		
	2017	2018	% Change	2017	2018	% Change
Hotel/Motel/Resort/B&B	2.4	2.3	-4.2%	2.8	2.7	-3.6%
Condo/Cottage/Vacation Home	4.7	4.1	-12.8%	6.9	7.0	1.4%
RV Park/Campground	2.2	2.3	4.5%	8.5	12.2	43.5%
Average	**2.9**	**2.7**	-6.9%	**4.0**	**4.0**	--

Q18: What was your average number of guests per room/site/unit in [April/May/June]?
Q19: What was the average length of stay (in nights) of your guests in [April/May/June]?

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

Average Party Size
2017 2018

Average Length of Stay
2017 2018
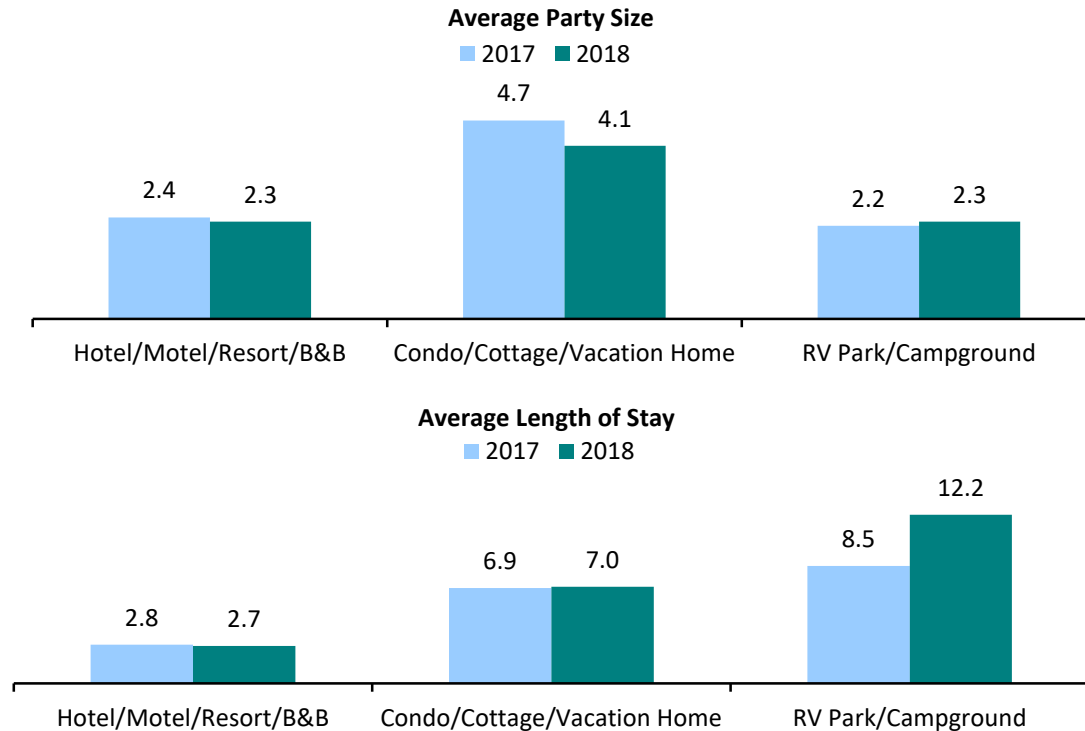
Lodging Management Estimates

Guest Profile		
Spring Season	**2017**	**2018**
	A	**B**
Total Number of Responses	**98**	**118**
<u>Purpose of Visit</u>		
Leisure/Vacation	78%	72%
Business	9%	12%
Weddings/Social groups/Reunions (net)	5%	6%
Sport events	3%	5%
Conference/meeting	3%	3%
Tour and Travel Groups	2%	2%

Q22: What percent of your [April/May/June] room/site/unit occupancy do you estimate was generated by:

Purpose of Visit
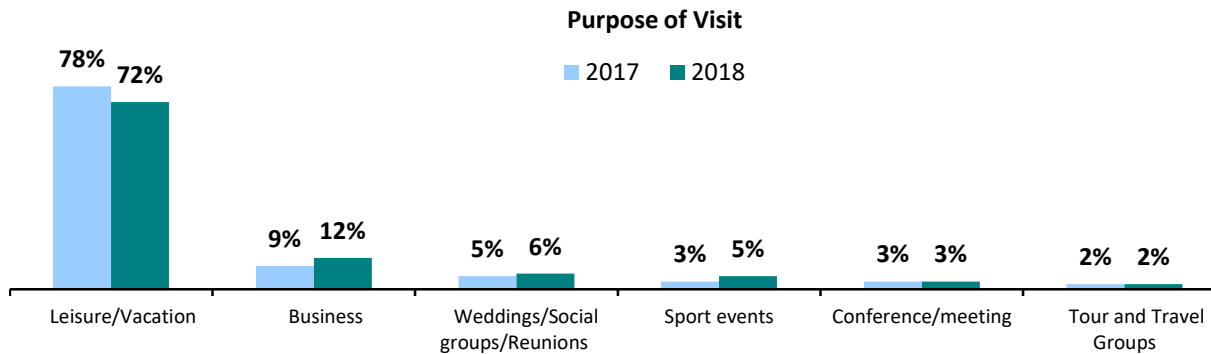
Occupancy Barometer

Level of Reservations for Next 3 Months Compared to Last Year		
Spring Season	**2017**	**2018**
	A	**B**
Total Respondents	**108**	**126**
Up/Same (net)	56%	67% a
Up	23%	34% a
Same	33%	33%
Down	36% b	25%
No Answer	7%	8%

Q24: Compared to July, August, and September of 2017, is your property's total level of reservations up, the same or down for July, August, and September of 2018?
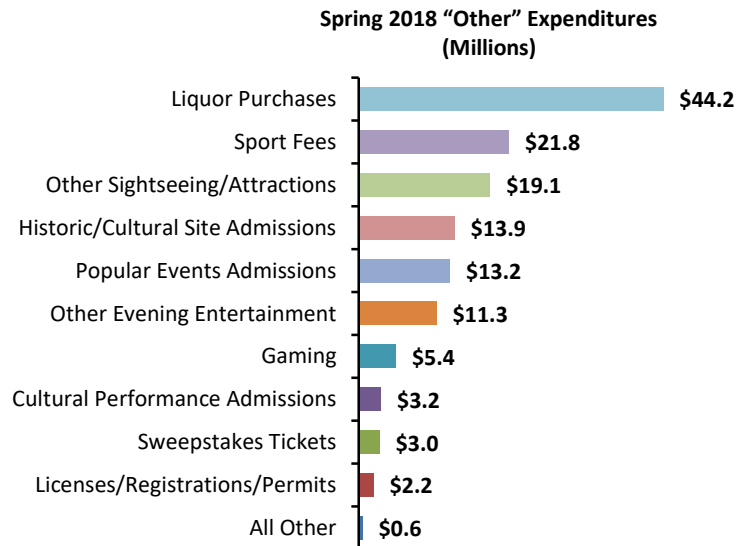
Level of Reservations for Next 3 Months
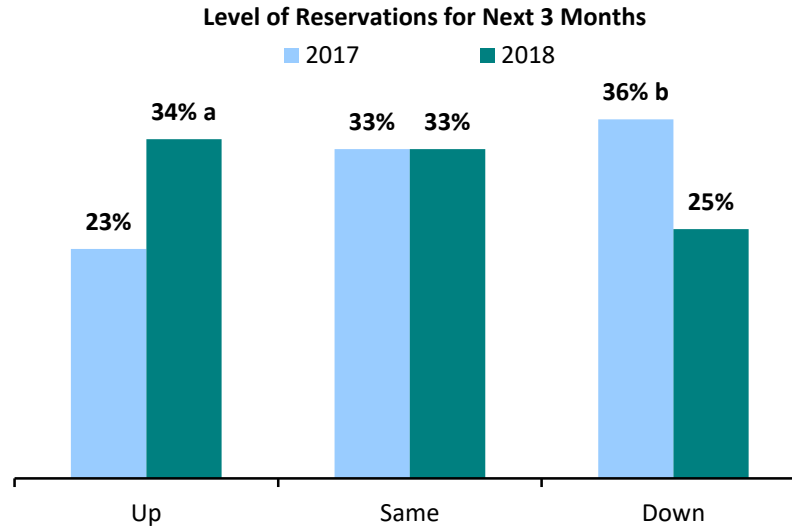
Economic Impact Analysis

Spring 2018

Total Visitor Expenditures by Spending Category

TOTAL EXPENDITURES			
Spring Season	**2017**	**2018**	**% Change**
TOTAL	$728,035,018	$755,450,385	3.8%
Food and Beverages	$185,064,979	$195,213,846	5.5%
Shopping	$174,720,564	$180,361,019	3.2%
Lodging Accommodations	$175,408,246	$177,946,457	1.4%
Ground Transportation	$62,177,601	$64,092,648	3.1%
Other	$130,663,628	$137,836,415	5.5%

(Note: Other includes the categories detailed below.)

**Spring 2018 "Other" Expenditures
(Millions)**

Category	Value
Liquor Purchases	$44.2
Sport Fees	$21.8
Other Sightseeing/Attractions	$19.1
Historic/Cultural Site Admissions	$13.9
Popular Events Admissions	$13.2
Other Evening Entertainment	$11.3
Gaming	$5.4
Cultural Performance Admissions	$3.2
Sweepstakes Tickets	$3.0
Licenses/Registrations/Permits	$2.2
All Other	$0.6

(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

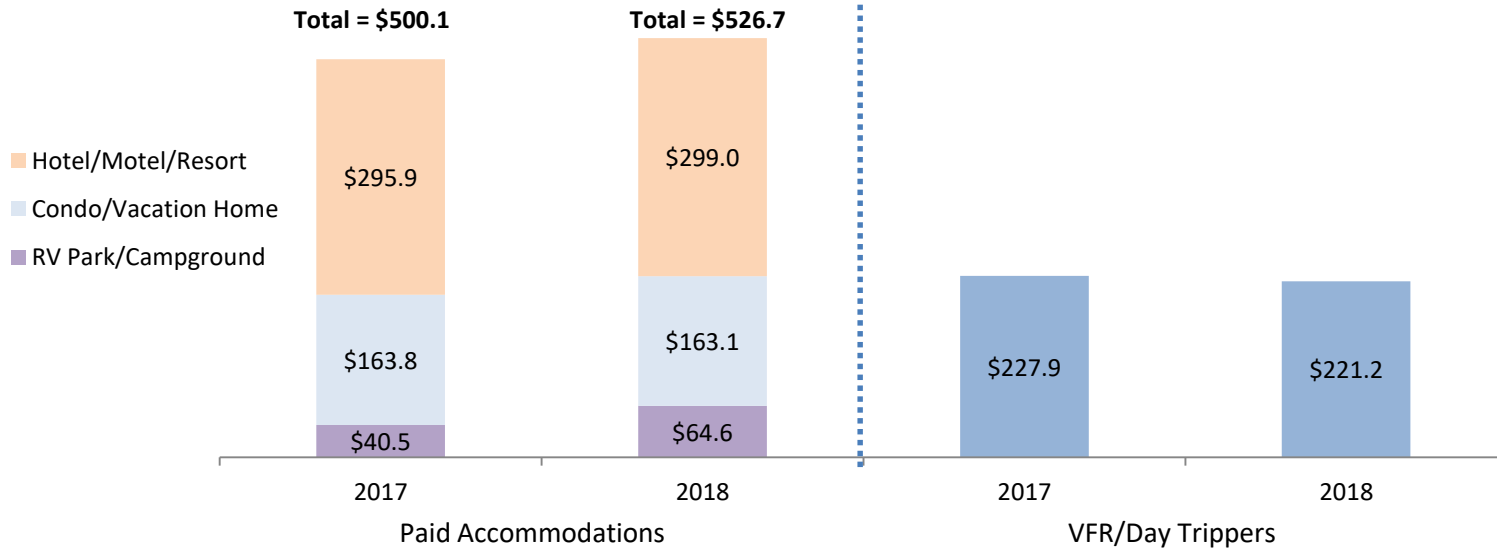| TOTAL EXPENDITURES						
	Staying Paid Accommodations			Visiting Friends and Relatives/Day Trippers		
Spring Season	2017	2018	% Change	2017	2018	% Change
TOTAL	$500,090,495	$526,702,281	5.3%	$227,944,523	$228,748,104	0.4%
Lodging Accommodations	$175,408,246	$177,946,457	1.4%	$0	$0	--
Food and Beverages	$110,004,843	$117,802,350	7.1%	$75,060,136	$77,411,496	3.1%
Shopping	$100,713,339	$107,589,211	6.8%	$74,007,225	$72,771,808	-1.7%
Ground Transportation	$39,213,812	$41,615,045	6.1%	$22,963,789	$22,477,603	-2.1%
Other	$74,750,255	$81,749,218	9.4%	$55,913,373	$56,087,197	0.3%

"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					
Spring Season	2017	2018	% Change	2017	2018
TOTAL	$728,035,018	$755,450,385	3.8%	100%	100%
Visiting Friends & Relatives/Day Trippers	$227,944,523	$228,748,104	0.4%	31%	30%
Paid Accommodations	$500,090,495	$526,702,281	5.3%	69%	70%
Hotel/Motel/Resort/B&B	$295,864,452	$299,046,878	1.1%	41%	40%
Condo/Cottage/Vacation Home	$163,767,728	$163,104,868	-0.4%	22%	22%
RV Park/Campground	$40,458,315	$64,550,535	59.5%	6%	9%

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 <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.
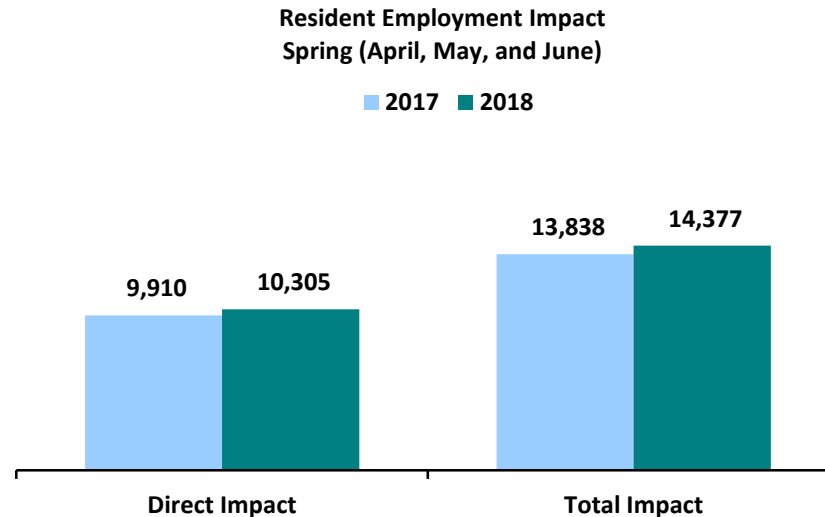
Impact on Jobs for Lee County Residents

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
Spring (April, May, and June)

■ 2017   ■ 2018

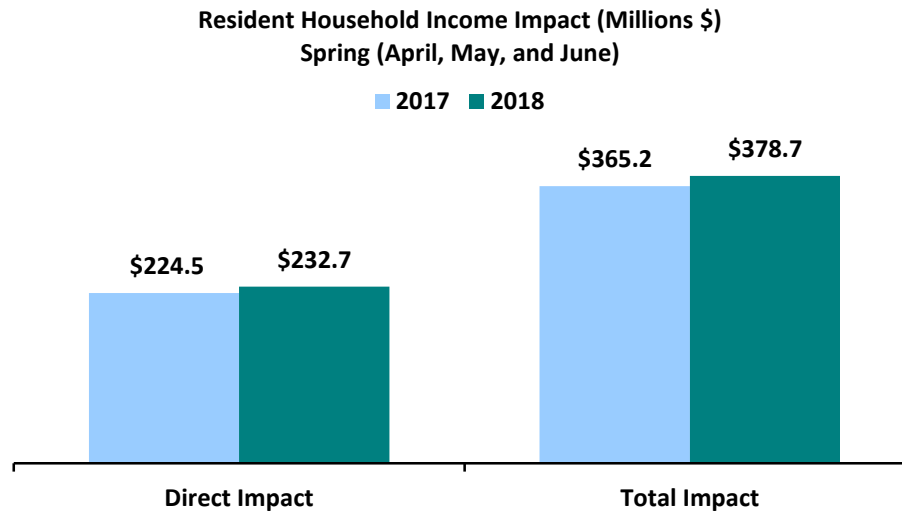|	Direct Impact	Total Impact
2017	9,910	13,838
2018	10,305	14,377

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 $)
Spring (April, May, and June)

■ 2017 ■ 2018

	Direct Impact	Total Impact
2017	$224.5	$365.2
2018	$232.7	$378.7

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.
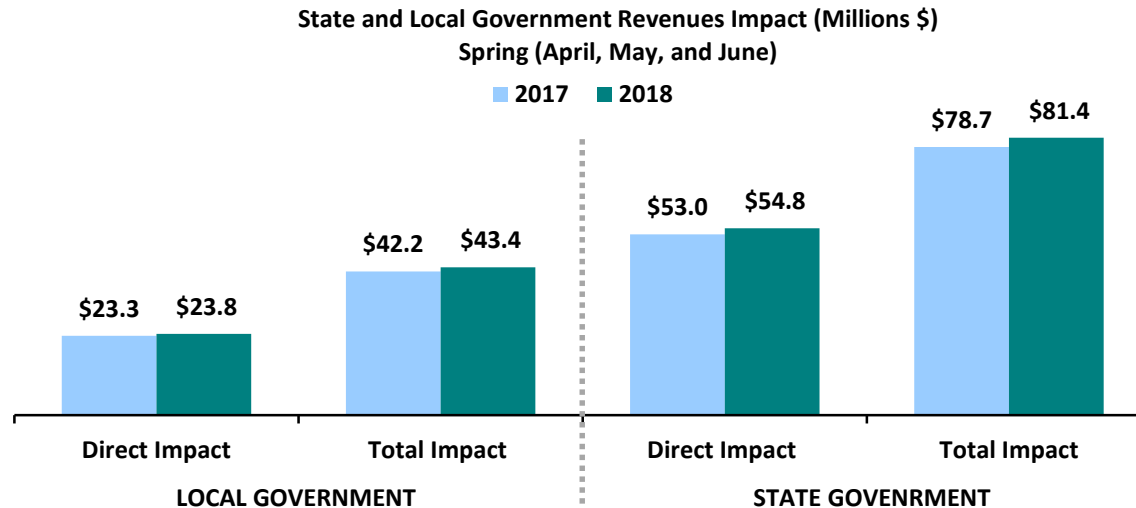
The gross government revenues accruing to governments as A result of producing the output purchased with visitor expenditures is the <u>government revenue impact</u>.

<u>Local government revenue impact</u> 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.

<u>State government revenue impact</u> 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 $)
Spring (April, May, and June)

■ 2017   ■ 2018

	Direct Impact	Total Impact	Direct Impact	Total Impact
2017	$23.3	$42.2	$53.0	$78.7
2018	$23.8	$43.4	$54.8	$81.4

LOCAL GOVERNMENT | **STATE GOVENRMENT**

Appendix

Spring 2018

April 2018 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Sanibel	Tortuga Beach Club	4/6/2018	8
Sanibel	Loggerhead Cay	4/6/2018	8
Sanibel	Lighthouse Beach	4/6/2018	10
Sanibel	Sanibel Inn	4/6/2018	10
Fort Myers	RSW Airport	4/7/2018	33
Fort Myers Beach	Cane Palm Beach Condos	4/10/2018	9
Fort Myers Beach	The Pier	4/10/2018	15
Fort Myers Beach	Best Western PLUS Beach Resort	4/10/2018	9
Fort Myers Beach	Estero Island Beach Club	4/10/2018	8
Fort Myers	Edison & Ford Winter Estates	4/11/2018	20
Bonita Springs	Bonita Beach	4/12/2018	30
Cape Coral	Cape Coral Yacht Club	4/13/2018	19
Fort Myers	Summerlin Square Trolley	4/14/2018	6
Fort Myers	Edison & Ford Winter Estates	4/20/2018	20
Fort Myers Beach	DiamondHead Beach Resort	4/25/2018	8
Fort Myers Beach	Times Square	4/25/2018	10
Fort Myers Beach	Neptune Inn	4/25/2018	5
Fort Myers Beach	Bel-Air	4/25/2018	7
Fort Myers	Edison & Ford Winter Estates	4/26/2018	19
Sanibel	Compass Pointe	4/27/2018	7
Sanibel	Holiday Inn Sanibel Island	4/27/2018	11
Sanibel	Pelican Roost	4/27/2018	7
Sanibel	Sanibel Surfside	4/27/2018	8
Fort Myers	RSW Airport	4/28/2018	35
Total			**322**

May 2018 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Sanibel	Song of the Sea	5/2/2018	8
Sanibel	Compass Pointe	5/2/2018	8
Sanibel	Holiday Inn Sanibel Island	5/2/2018	11
Sanibel	Sanibel Surfside	5/2/2018	8
Estero	Miromar Outlet	5/4/2018	20
Fort Myers	RSW Airport	5/5/2018	35
Fort Myers Beach	Neptune Inn	5/8/2018	8
Fort Myers Beach	Estero Island Beach Club	5/8/2018	7
Fort Myers Beach	Times Square	5/8/2018	14
Fort Myers Beach	DiamondHead Beach Resort	5/8/2018	7
Fort Myers	Centennial Park	5/12/2018	7
Fort Myers	Edison & Ford Winter Estates	5/17/2018	20
Fort Myers	RSW Airport	5/19/2018	32
Fort Myers	Edison & Ford Winter Estates	5/21/2018	18
Fort Myers Beach	Best Western	5/22/2018	9
Fort Myers Beach	Windward Passage	5/22/2018	6
Fort Myers Beach	Cane Palm Beach Condos	5/22/2018	6
Fort Myers Beach	Lani Kai	5/22/2018	6
Fort Myers Beach	The Pier	5/22/2018	7
Sanibel	Sanibel Mooring	5/24/2018	7
Sanibel	Lighthouse Beach	5/24/2018	12
Sanibel	Sanibel Arms West	5/24/2018	7
Sanibel	Sanibel Inn	5/24/2018	10
Fort Myers	Edison & Ford Winter Estates	5/30/2018	19
Bonita Springs	Bonita Beach	5/31/2018	29
Total			**321**

June 2018 Interviewing Statistics

City	Event/Location	Interviewing Dates	Number of Interviews
Fort Myers	FHSA Tournament (Hammond Stadium)	6/1/2018	27
Fort Myers	RSW Airport	6/2/2018	36
Bonita Springs	Bonita Beach	6/5/2018	30
Fort Myers Beach	Lani Kai	6/7/2018	7
Fort Myers Beach	Windward Passage	6/7/2018	9
Fort Myers Beach	Estero Island Beach Club	6/7/2018	9
Fort Myers Beach	Best Western PLUS Beach Resort	6/7/2018	11
Sanibel	Sanibel Mooring	6/8/2018	8
Sanibel	Sanibel Arms	6/8/2018	7
Sanibel	Sanibel Inn	6/8/2018	11
Sanibel	Tortuga Beach Resort	6/8/2018	6
Sanibel	Loggerhead Cay	6/8/2018	7
Fort Myers	Edison & Ford Winter Estates	6/12/2018	18
Estero	Miromar Outlet	6/15/2018	20
Sanibel	Pelican Roost	6/21/2018	10
Sanibel	Sanibel Surfside	6/21/2018	9
Sanibel	Holiday Inn Sanibel Island	6/21/2018	12
Fort Myers	RSW Airport	6/23/2018	32
Fort Myers	Edison & Ford Winter Estates	6/26/2018	18
Fort Myers Beach	Cane Palm Beach Condos	6/27/2018	7
Fort Myers Beach	Times Square	6/27/2018	23
Fort Myers Beach	DiamondHead Beach Resort	6/27/2018	8
Total			**325**

Occupancy Interviewing Statistics

Interviews were conducted during the first two weeks of July 2018 to gather data for April, May, and June 2018 lodging activity. Information was provided by 133 Lee County lodging properties.

Lodging Type	Spring 2018 Number of Interviews
Hotel/Motel/Resort/B&Bs	87
Condo/Cottage/Vacation Home/Timeshare	32
RV Park/Campground	14
Total	**133**