

The Beaches of Fort Myers & Sanibel

Lee County VCB

January – March 2020

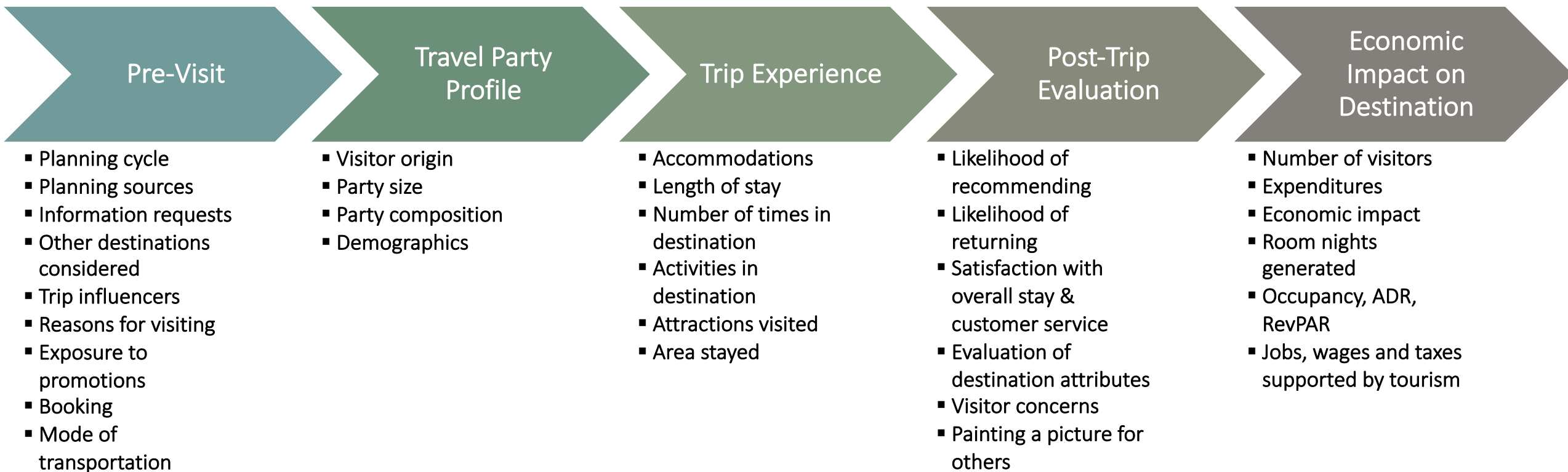
Visitor Tracking, Occupancy & Economic Impact Study



Introduction



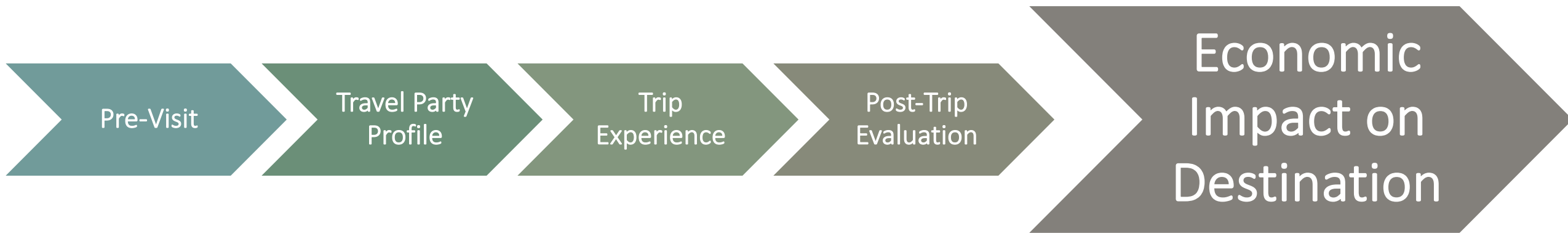
Study Objectives: Map the Visitor Journey



Executive Summary



Visitor Journey: Economic Impact on Destination



A possible record quarter was ambushed by COVID-19, and key KPIs dropped precipitously after March 10.
The net result was a quarter with double digit drops in many KPIs.

Tourism Snapshot: Jan – Mar 2020¹

Visitor & Lodging Statistics	Jan – Mar 2019	Jan – Mar 2020	% Change
Visitors	1,311,900	1,091,300	-16.8%
Room Nights	1,848,200	1,599,300	-13.5%
Direct Expenditures ²	\$1,251,828,600	\$1,082,785,200	-13.5%
Total Economic Impact ³	\$2,032,969,600	\$1,758,443,200	-13.5%

¹ Decreases in KPIs from 2019 to 2020 were due to COVID-19.

² Includes: accommodations, restaurants, entertainment, shopping, transportation, groceries, and “other” expenses.

³ Economic impact includes indirect and induced effects of visitor spending. Indirect effects are increased business spending resulting from tourism dollars. Induced effects are increased household spending resulting from tourism dollars.

Tourism Snapshot: Calendar Year-to-Date 2020¹

Visitor & Lodging Statistics	CYTD 2019	CYTD 2020	% Change
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¹ Year-over-year differences impacted by COVID-19 effects on travel.

² Includes: accommodations, restaurants, entertainment, shopping, transportation, groceries, and “other” expenses.

³ Economic impact includes indirect and induced effects of visitor spending. Indirect effects are increased business spending resulting from tourism dollars. Induced effects are increased household spending resulting from tourism dollars.

Jan – Mar Lodging Statistics

78.2%

Occupancy

↓ -9.4%

\$196.19

ADR

↓ -8.3%¹

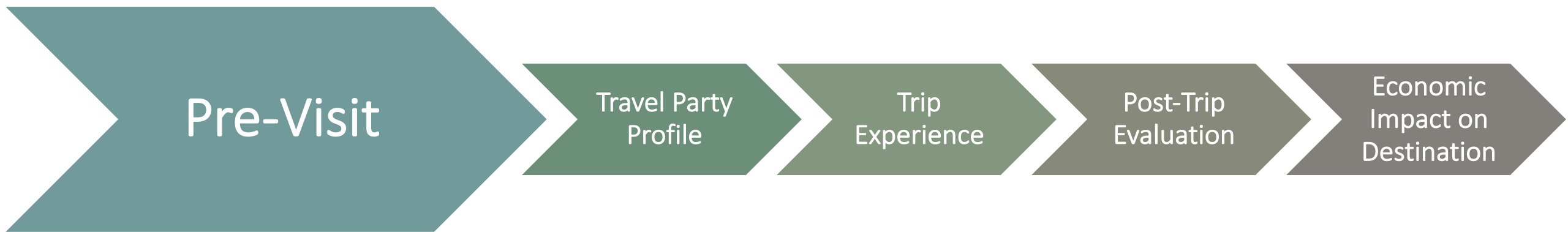
\$153.42

RevPAR

↓ -18.4%¹

¹Adjustment to 2019 ADR was made.

Visitor Journey: Pre-Visit



Trip Planning

- Over **3 in 5** visitors planned their trip to The Beaches of Fort Myers & Sanibel at least 3 months in advance
- **1 in 3** visitors requested information from hotels, the VCB, etc., to plan their trip
- **16%** of visitors considered choosing other destinations when planning their trips



Trip Planning: Websites Used

→ **8 in 10** visitors used websites to plan their trip to The Beaches of Fort Myers & Sanibel

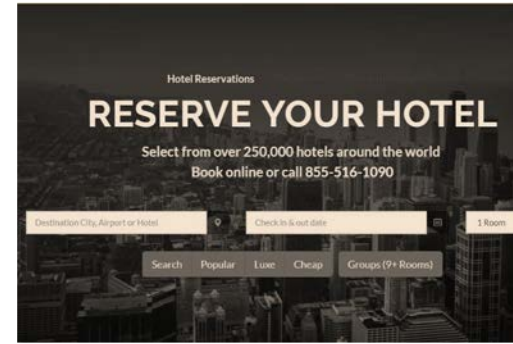
→ Top websites used to plan their trip include¹:



28% Airline websites



20% Search engines



19% Hotel websites



17% Trip Advisor

¹Multiple responses permitted.

Top Trip Influencers

→ Visitors were heavily influenced by the following when choosing where to vacation¹:



93% Warm weather



87% Peaceful/relaxing



83% Safe destination

¹Top 2 box scores. Attributes rated on a scale from 1 to 5 where 1 is Not at All Influential and 5 is Definitely Influential.

Top Reasons for Visiting

→ Visitors' top reasons for visiting The Beaches of Fort Myers & Sanibel include¹:



42% Relax & unwind



41% Beach



41% Vacation



25% Visit friends & relatives

¹Three responses permitted.

Promotions

→ **40%** of visitors recalled promotions in the past 6 months for The Beaches of Fort Myers & Sanibel

→ Top sources of recall include¹:



27% TV



25% Social media



25% Internet

¹Multiple responses permitted.

Booking

→ Visitors used the following to book their trips:



37% Directly with hotel/condo



20% VRBO, HomeAway



12% Other online travel agency



12% Vacation rental company



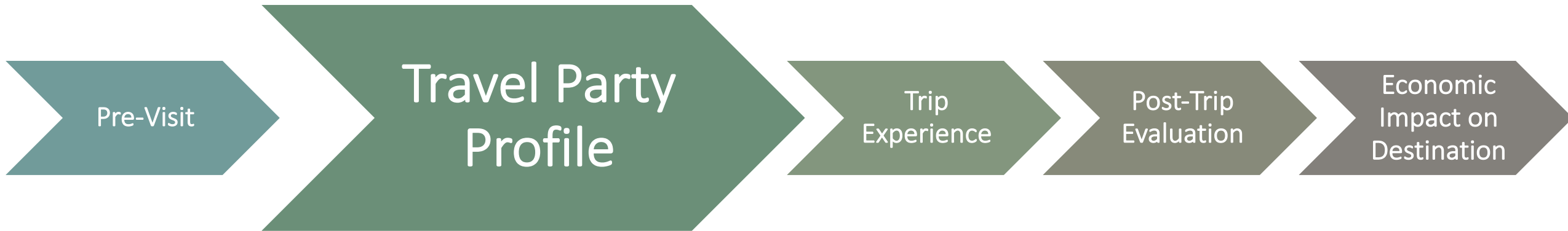
12% Airbnb

Transportation

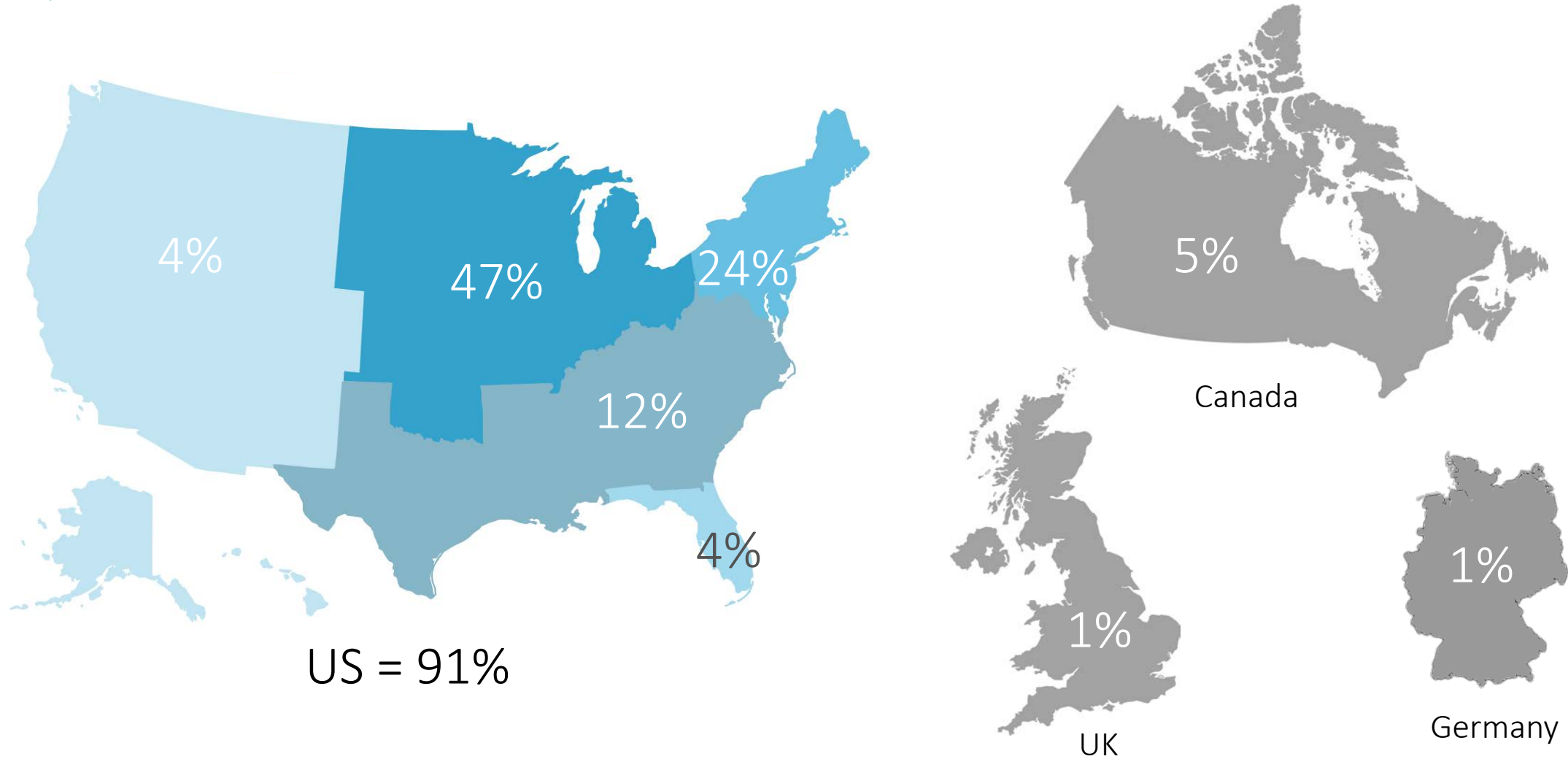


- **70%** of visitors flew to The Beaches of Fort Myers & Sanibel
- **80%** of visitors who flew to The Beaches of Fort Myers & Sanibel flew to RSW

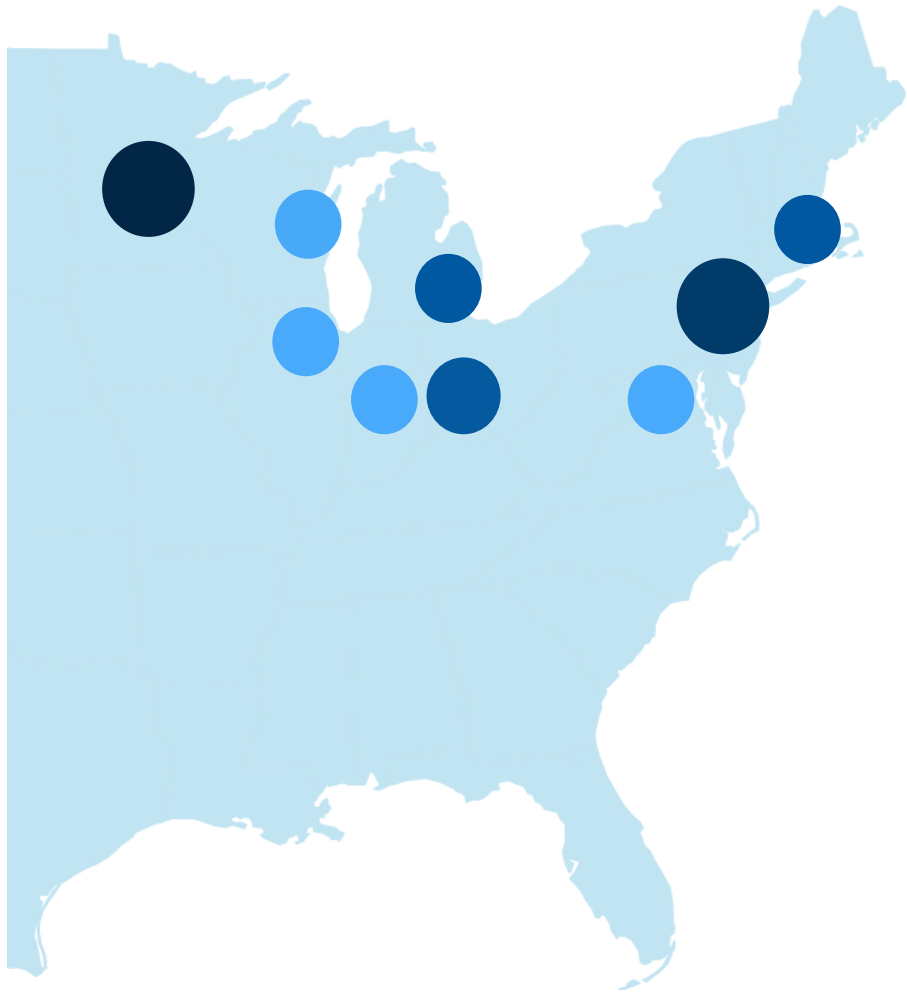
Visitor Journey: Travel Party Profile



Origin



Top Origin Markets



- 7% Minneapolis
- 5% New York City
- 4% Cincinnati
- 4% Detroit
- 4% Boston
- 3% Chicago
- 3% Washington D.C.
- 3% Indianapolis
- 3% Green Bay-Appleton

Travel Party Size and Composition

- Visitors traveled in a party composed of **3.1 people**¹
- **22%** traveled with children under the age of 18
- **48%** traveled as a couple, while **27%** of visitors traveled as a family



¹Source: Visitor Tracking Survey, includes all types of visitors

Demographic Profile

Jan – Mar Visitors:

- Average age of **53 years old**
- Median household income of **\$118,300**
- Married (**74%**)
- College educated (**67%**)
- Caucasian/white (**83%**)
- Female (**50%**)

Visitor Journey: Trip Experience



Accommodations



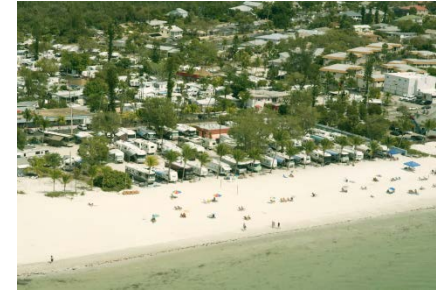
35% Hotel/Motel/Resort/B&B



32% Non-paid Accommodations



27% Condo/Vacation Rental



3% RV Park/Campground



3% Day trippers

Length of Stay & Number of Times in Destination

- Visitors¹ spent **10.5 nights** in The Beaches of Fort Myers & Sanibel
- **20%** were first time visitors
- **25%** have visited more than 10 times



¹Source: Visitor Tracking Survey, includes all types of visitors

Visitor Activities

→ Top visitor activities include¹:



62% Beaches



60% Relax &
unwind



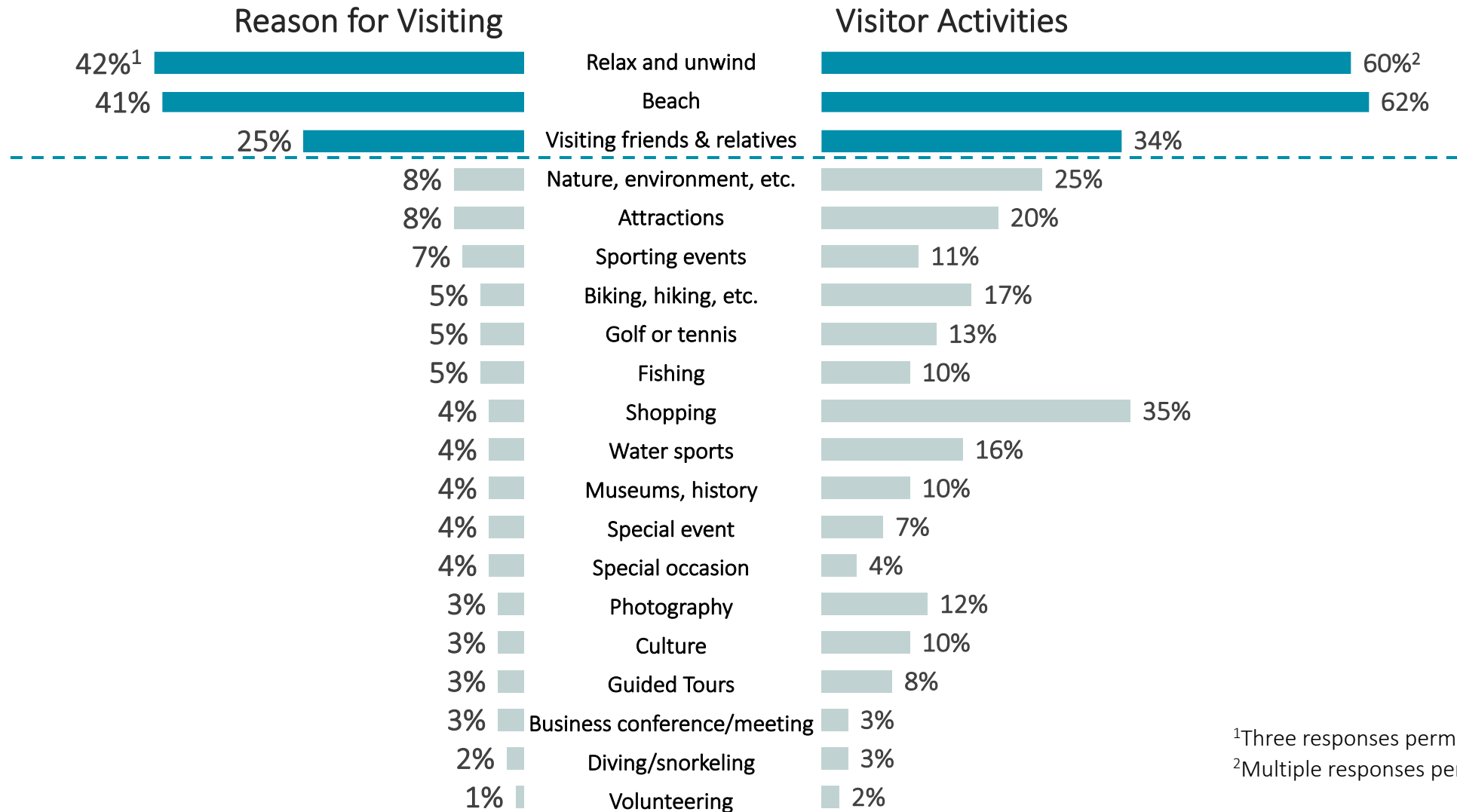
56% Dining

¹Multiple responses permitted.

Reason for Visiting vs. Visitor Activities

Key Reasons for Visiting

Trip Enhancements

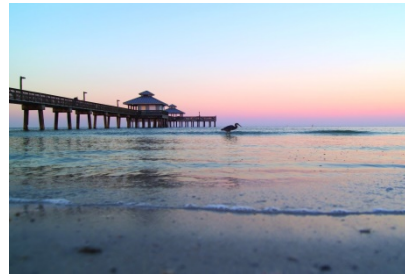


¹Three responses permitted.
²Multiple responses permitted.

Top Attractions Visited¹



60% Beaches



35% Fort Myers Beach Pier



27% Sanibel Lighthouse



20% Edison & Ford Winter Estates



17% Miromar Outlets



17% Sanibel Outlets



17% J.N. Ding Darling Wildlife Refuge

¹Multiple responses permitted.

Top Communities Stayed



21% Sanibel Island



21% Fort Myers Beach



18% Fort Myers



16% Cape Coral

Visitor Journey: Post-Trip Evaluation



Satisfaction



- **95%** of visitors are likely to recommend The Beaches of Fort Myers & Sanibel
- **94%** of visitors are likely to return
- **74%** of visitors are likely to return next year
- **34%** of visitors said paid accommodations “Far Exceeded” or “Exceeded” their expectations

Satisfaction



- **97%** of visitors were satisfied or very satisfied with their overall visit to The Beaches of Fort Myers & Sanibel
- **93%** of visitors were satisfied or very satisfied with customer service on their visit

Top Attribute Ratings

→ Visitors gave the highest ratings to the following destination attributes¹:



96% Warm weather



95% Peaceful/relaxing



94% Safe Destination

¹Top 2 box scores. Attributes rated on a scale from 1 to 5 where 1 is Poor and 5 is Excellent.

Visitor Concerns

- **1 in 2** were concerned about traffic
- **25%** of visitors had no concerns about the destination



Area Descriptions

*“Beautiful in February.
Temperature was perfect.
Weather was perfect. Shelling
was awesome. We loved going to
the beach. Sunsets and sunrises
were stunning. Loved the VRBO
condo. Took a cruise over to
Captiva for shelling and lunch.
Awesome tours and beaches.*

**Wonderful
Place to Visit**

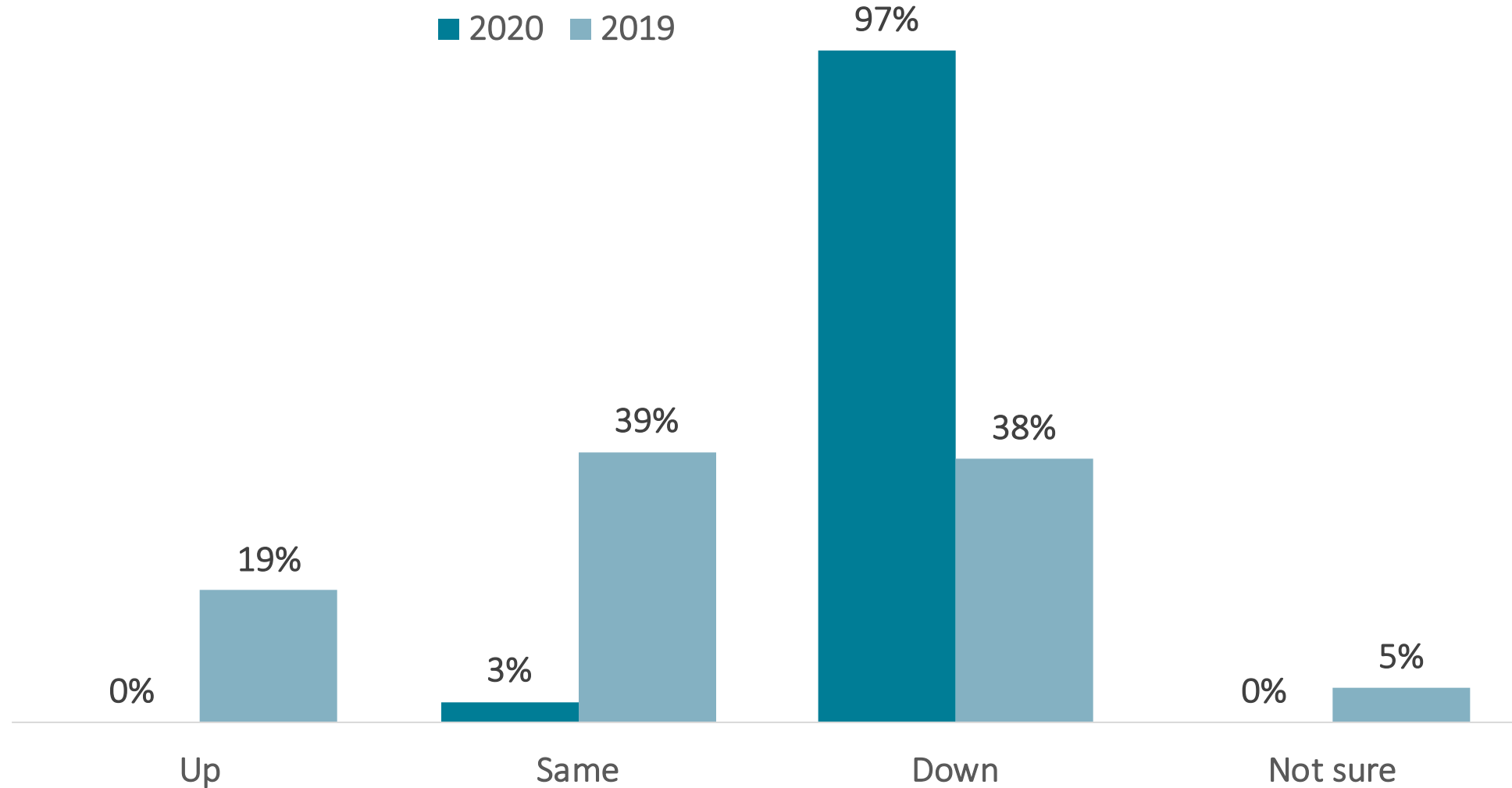
*“Peaceful and unspoiled
with a variety of activities
for people of all ages.
Relaxed vibe and kind
people.”*

**Relaxing and
Peaceful**

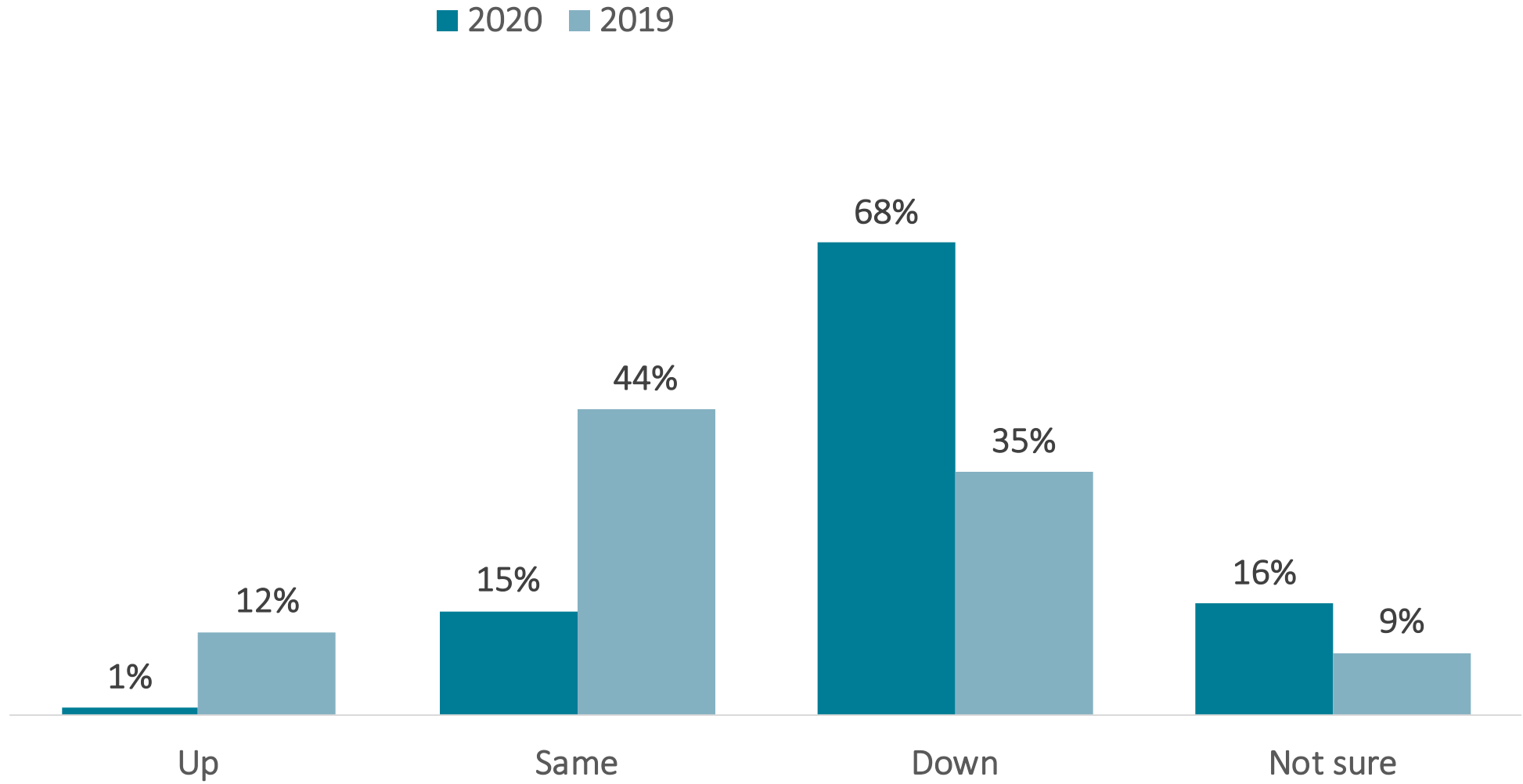
*“Beautiful state to visit the
weather is chilly but better
than home!”*

**Warm
Weather**

Occupancy Barometer: April – June Reservations



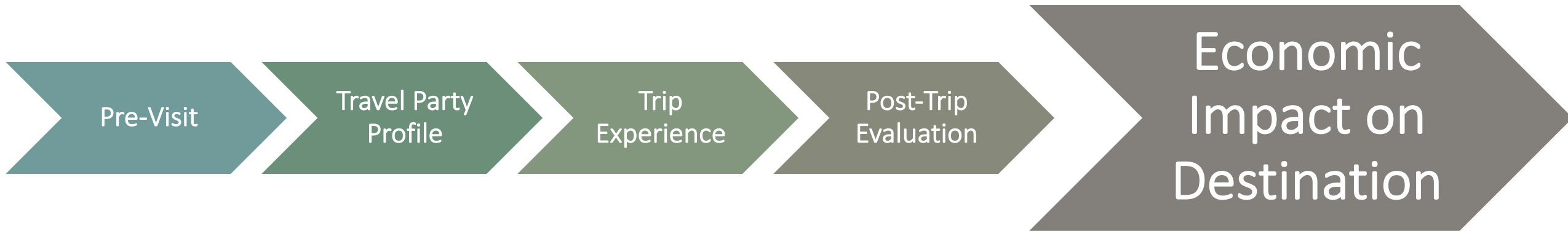
Occupancy Barometer: July-September Reservations



Detailed Findings

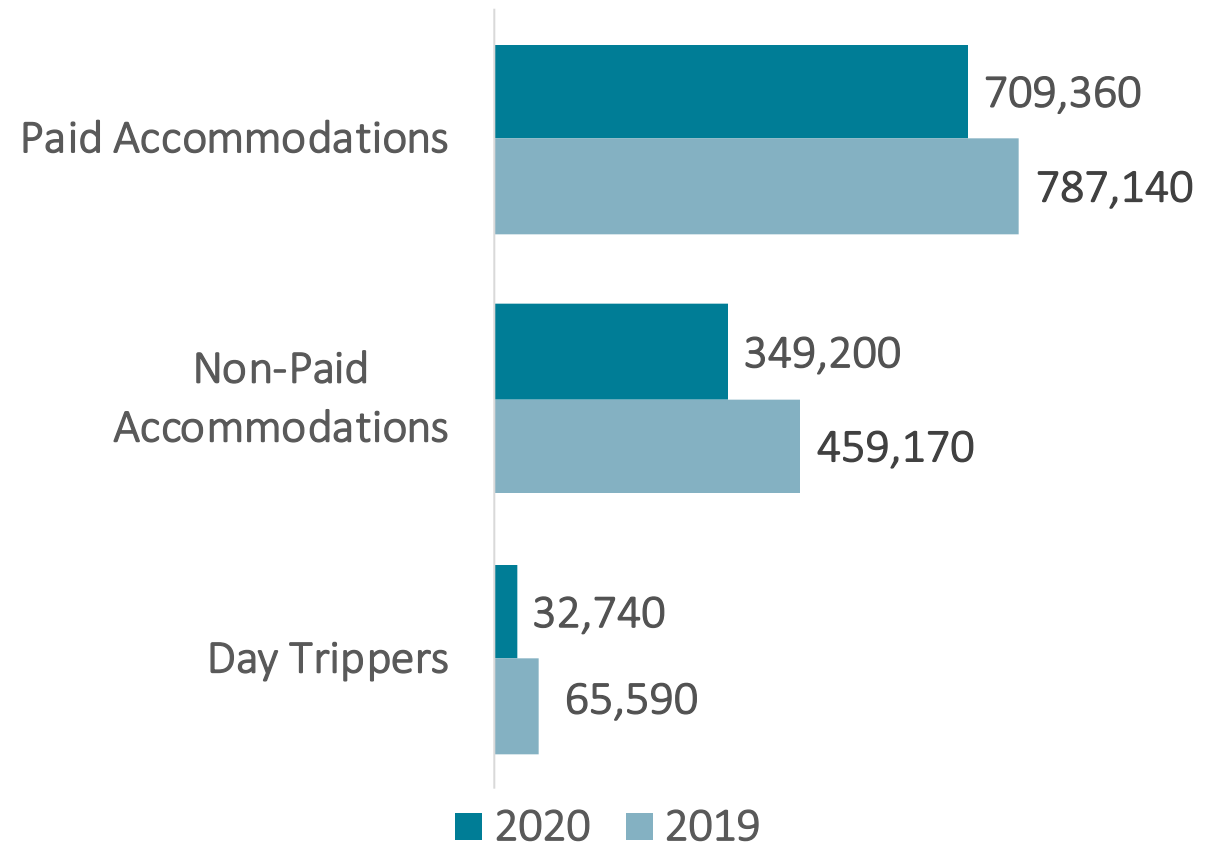


Visitor Journey: Economic Impact on Destination



Number of Visitors

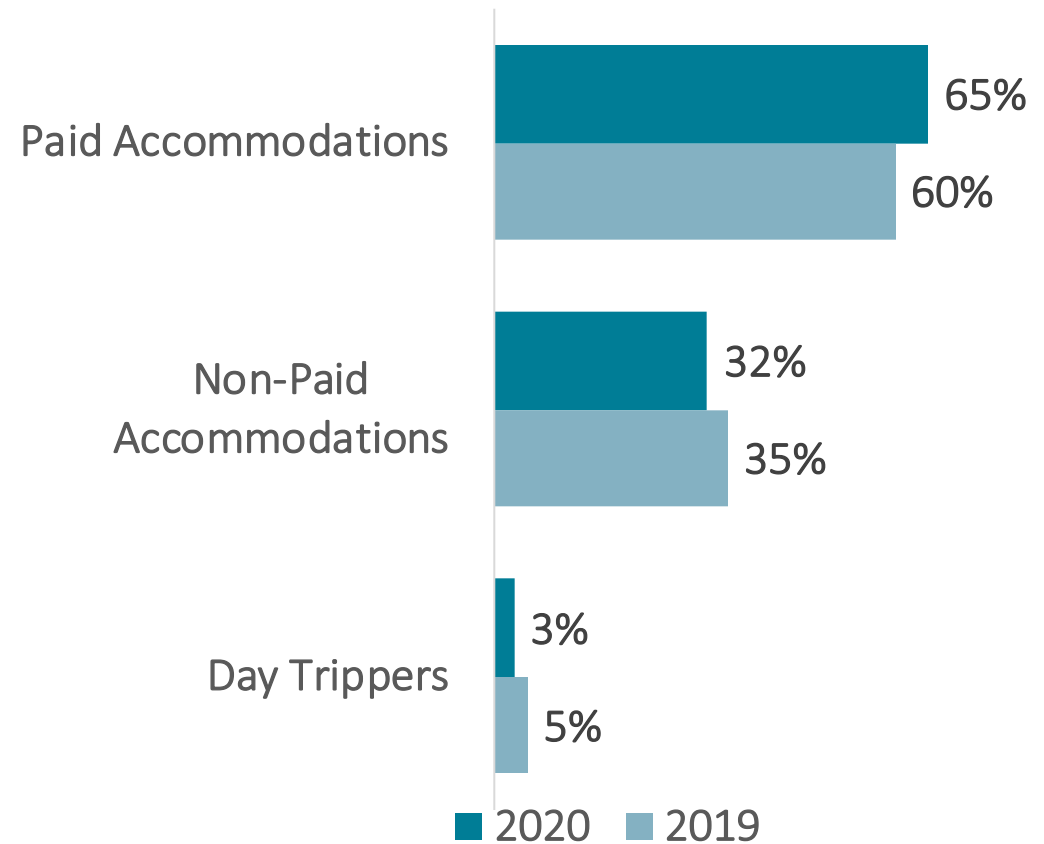
There were **1,091,300¹** visitors to The Beaches of Fort Myers & Sanibel in Jan – Mar 2020 (-16.8% from 2019).



¹Sources: Visitor Tracking Study & Occupancy Survey

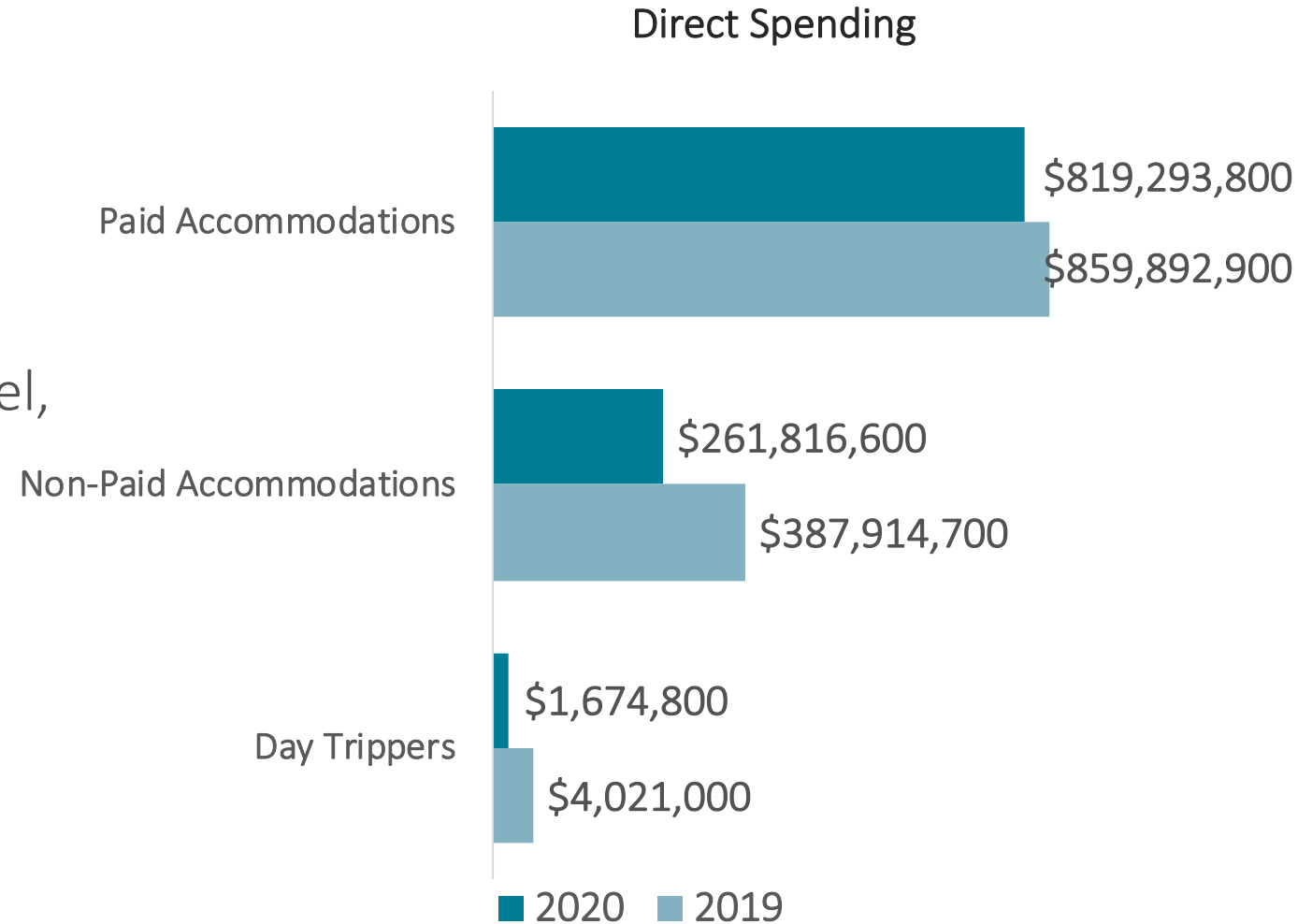
Visitor Type

Visitors staying in paid accommodations accounted for nearly 2 in 3 visitors.



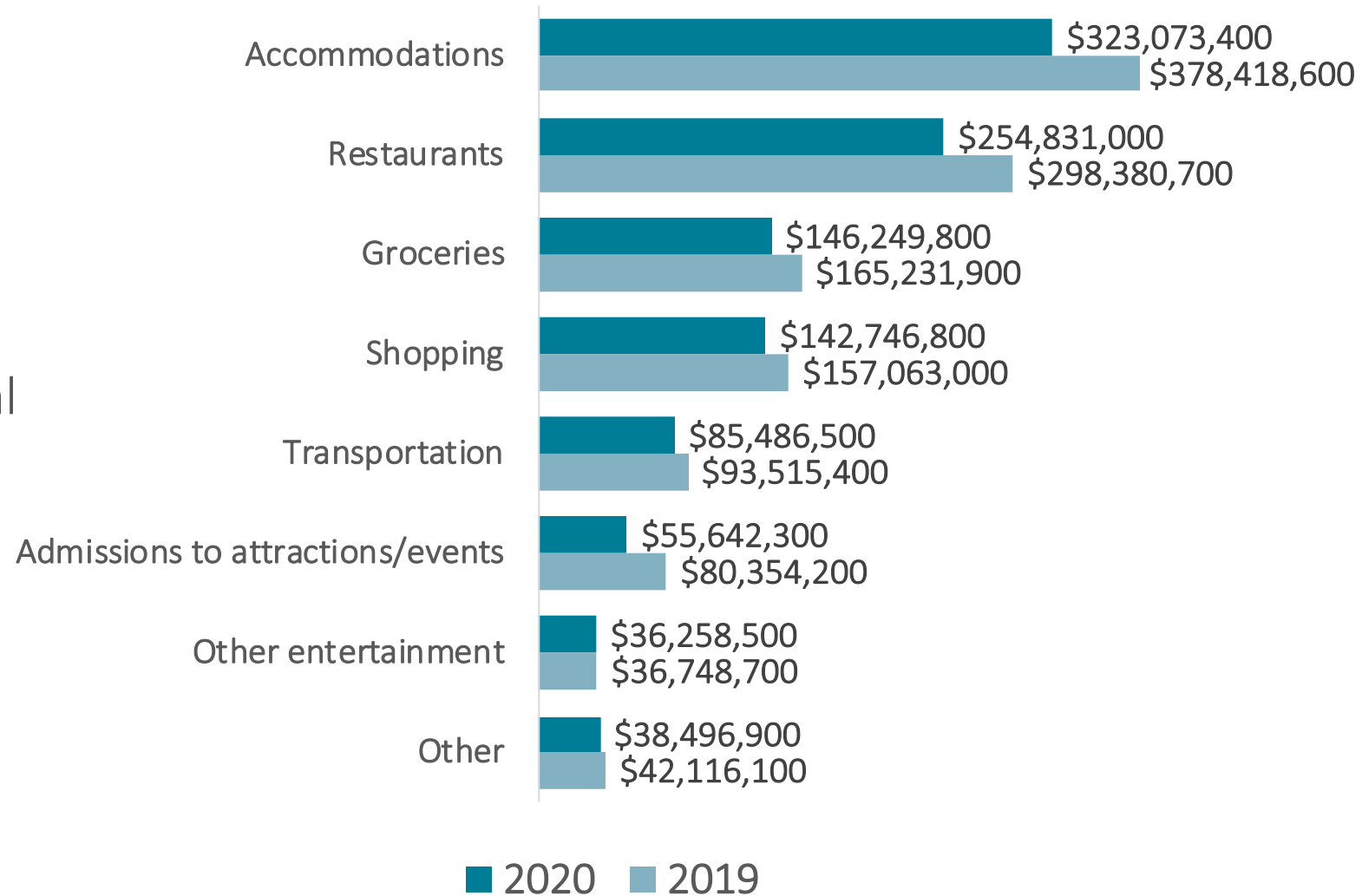
Visitor Expenditures by Visitor Type

Jan – Mar visitors spent **\$1,082,785,200** in The Beaches of Fort Myers & Sanibel, resulting in a total economic impact of **\$1,758,443,200**, down 13.5% from 2019.



Visitor Expenditures by Spending Category

Jan – Mar visitors spent
\$1,082,785,200 in The
 Beaches of Fort Myers &
 Sanibel, resulting in a total
 economic impact of
\$1,758,443,200.

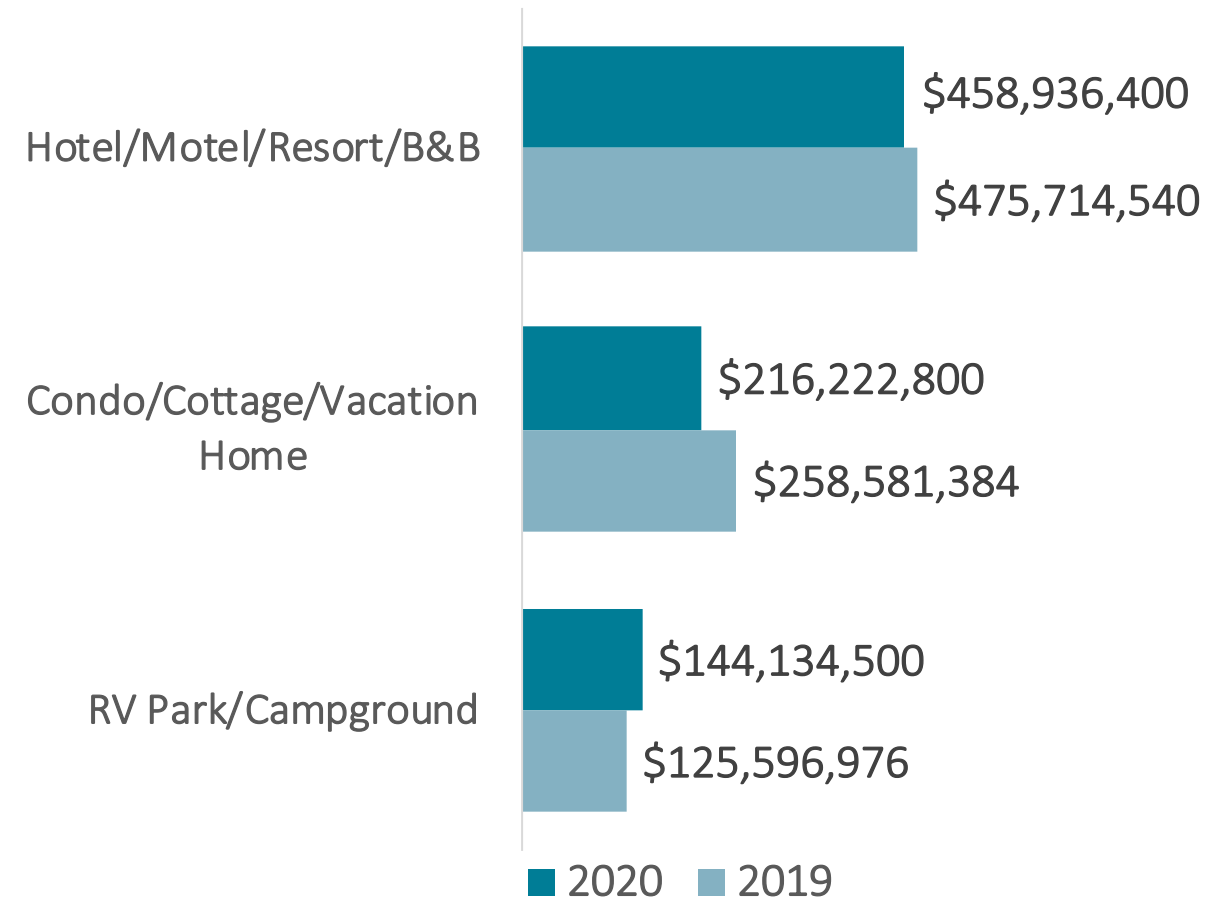


■ 2020 ■ 2019

Economic Impact on Destination
 Jan – Mar 2020

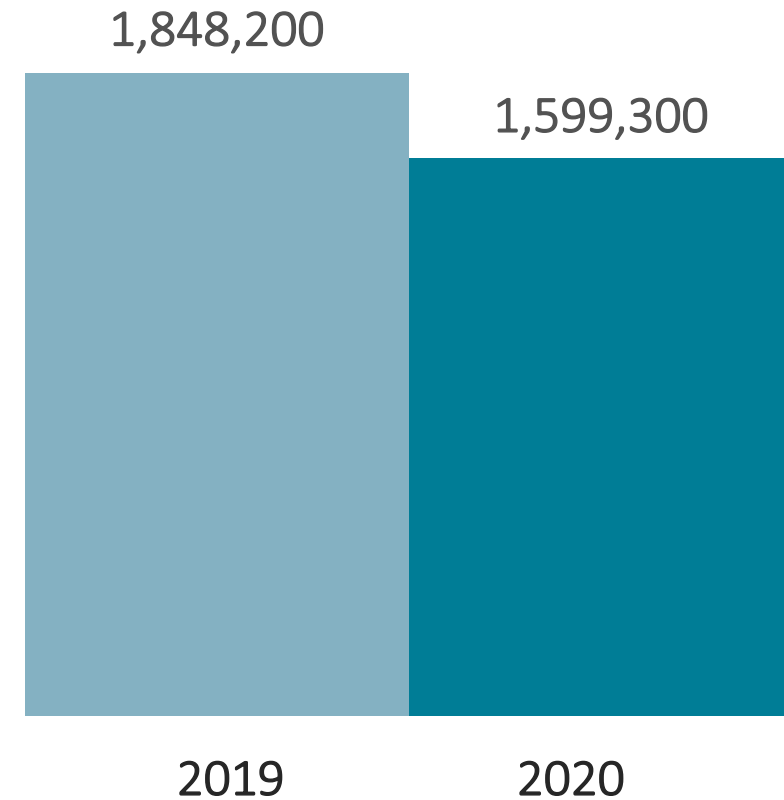
Visitor Expenditures by Lodging Type

Jan – Mar visitors staying in paid accommodations spent **\$819,293,700** in The Beaches of Fort Myers & Sanibel.



Room Nights Generated

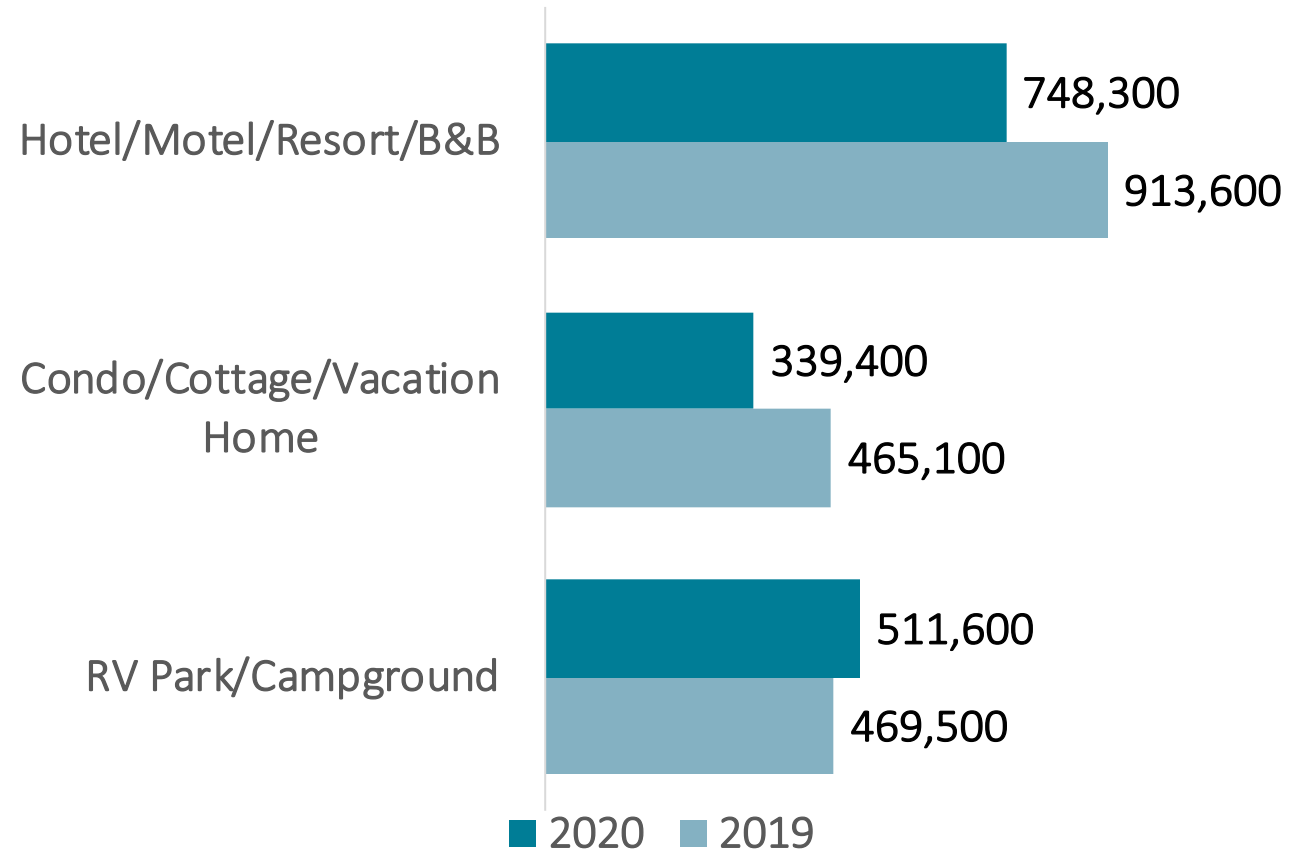
Jan – Mar visitors spent **1,599,300¹** nights in The Beaches of Fort Myers & Sanibel hotels, resorts, condos, rental houses, etc. (-13.5% from 2019).



¹Source: Occupancy Survey

Room Nights Generated

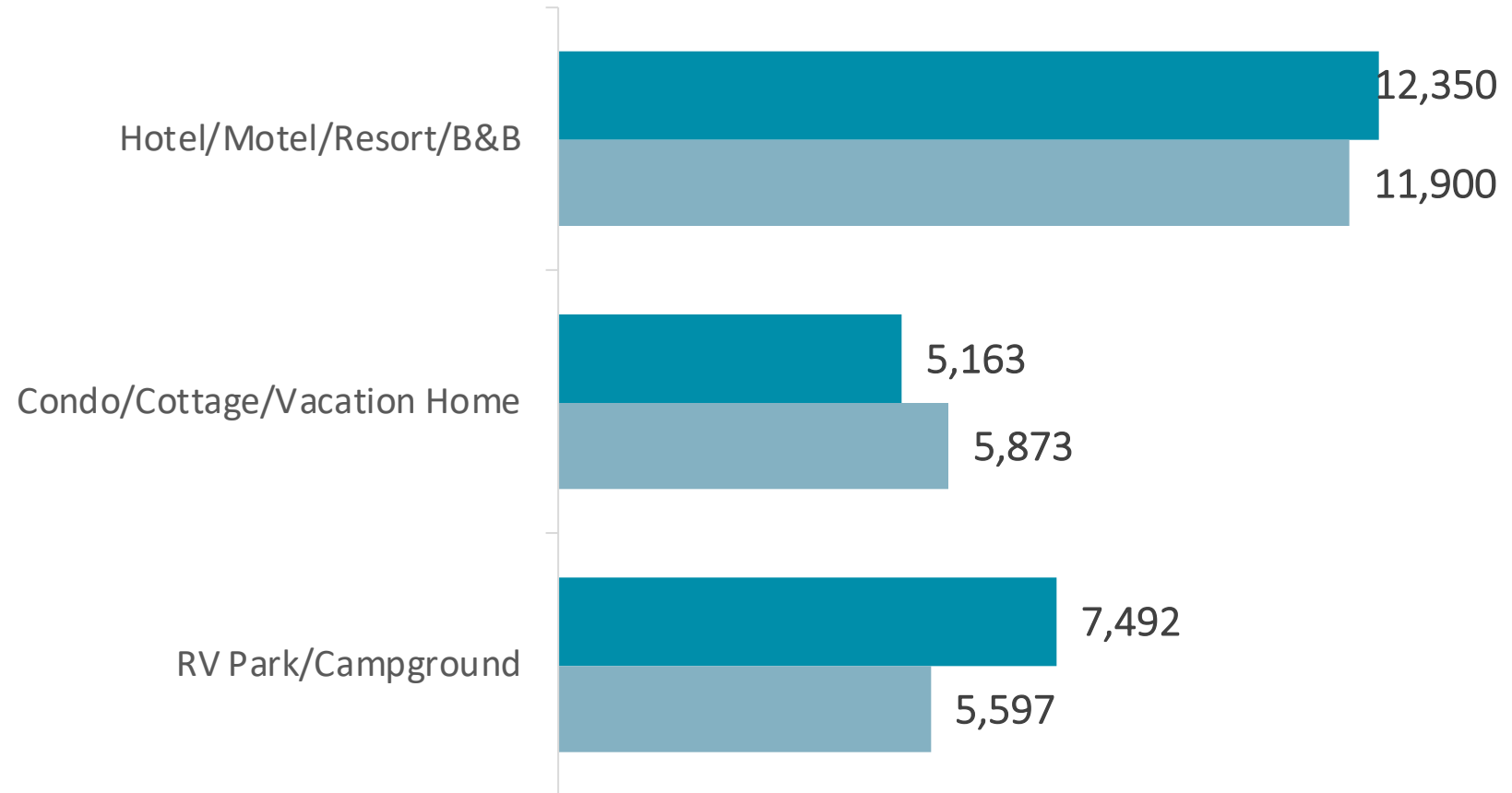
Motels, hotels, etc. accounted for about **1 in 2** nights in The Beaches of Fort Myers & Sanibel, while vacation rentals accounted for about **1 in 5** nights visitors spent in the area.



¹Source: Occupancy Survey

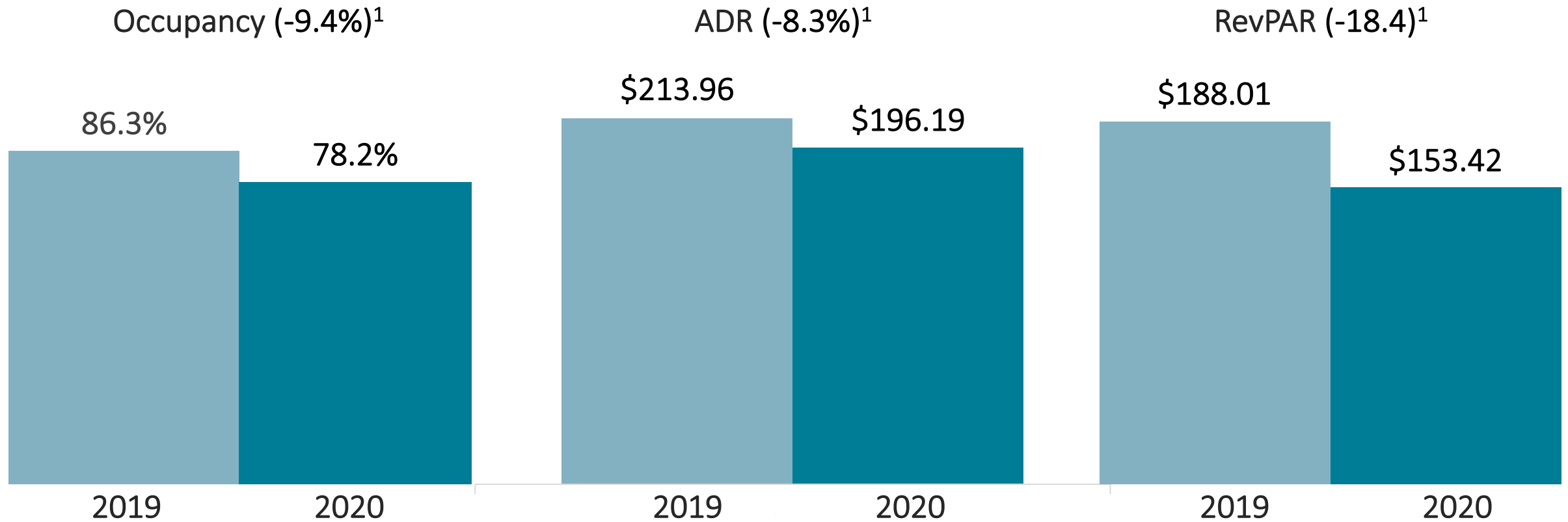
Available Units

There were **25,005¹** available units in Jan – Mar, 2020.



¹Source: Occupancy Survey

Occupancy, ADR and RevPAR

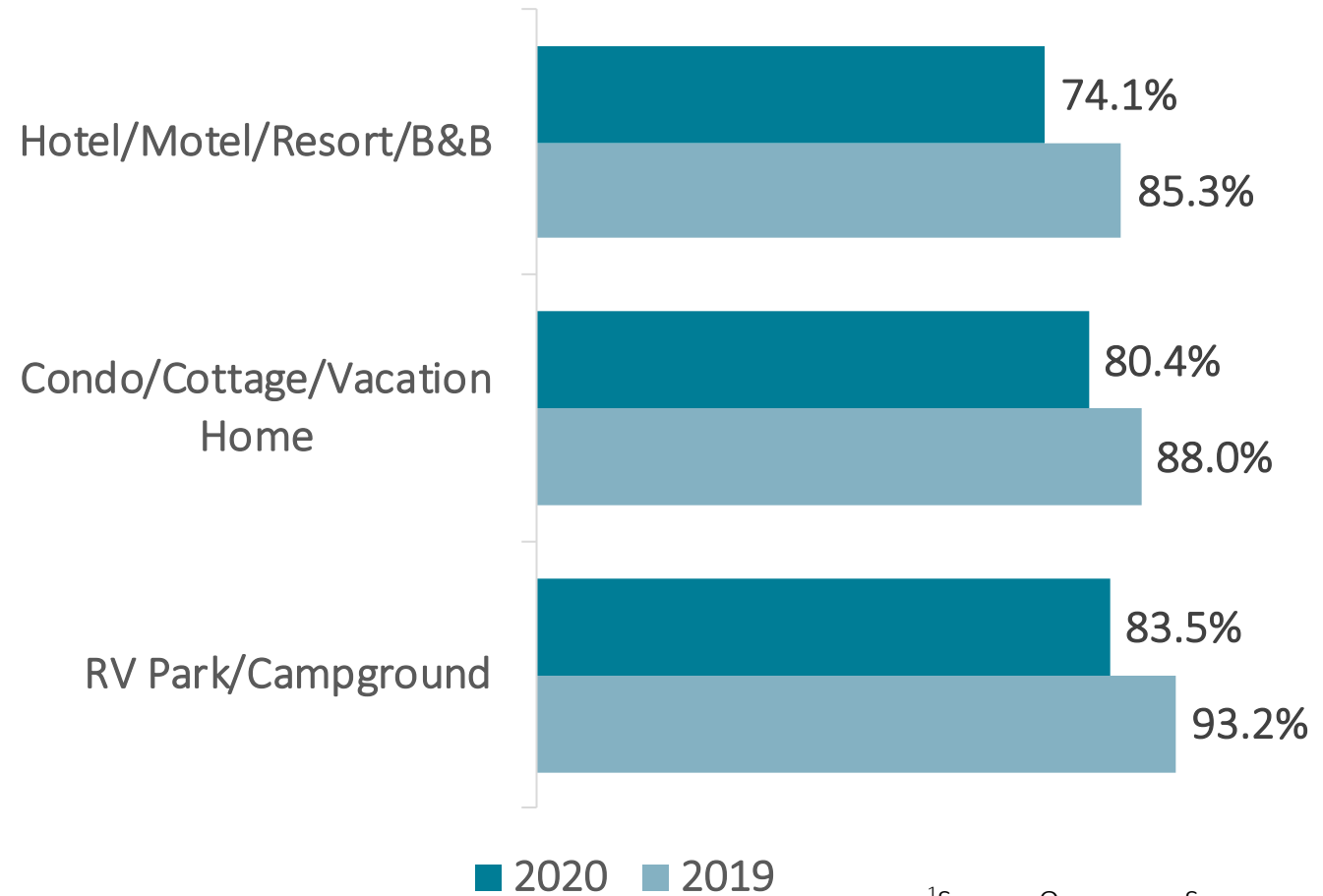


¹Source: Occupancy Survey

²Adjustment to 2019 ADR was made

Occupancy

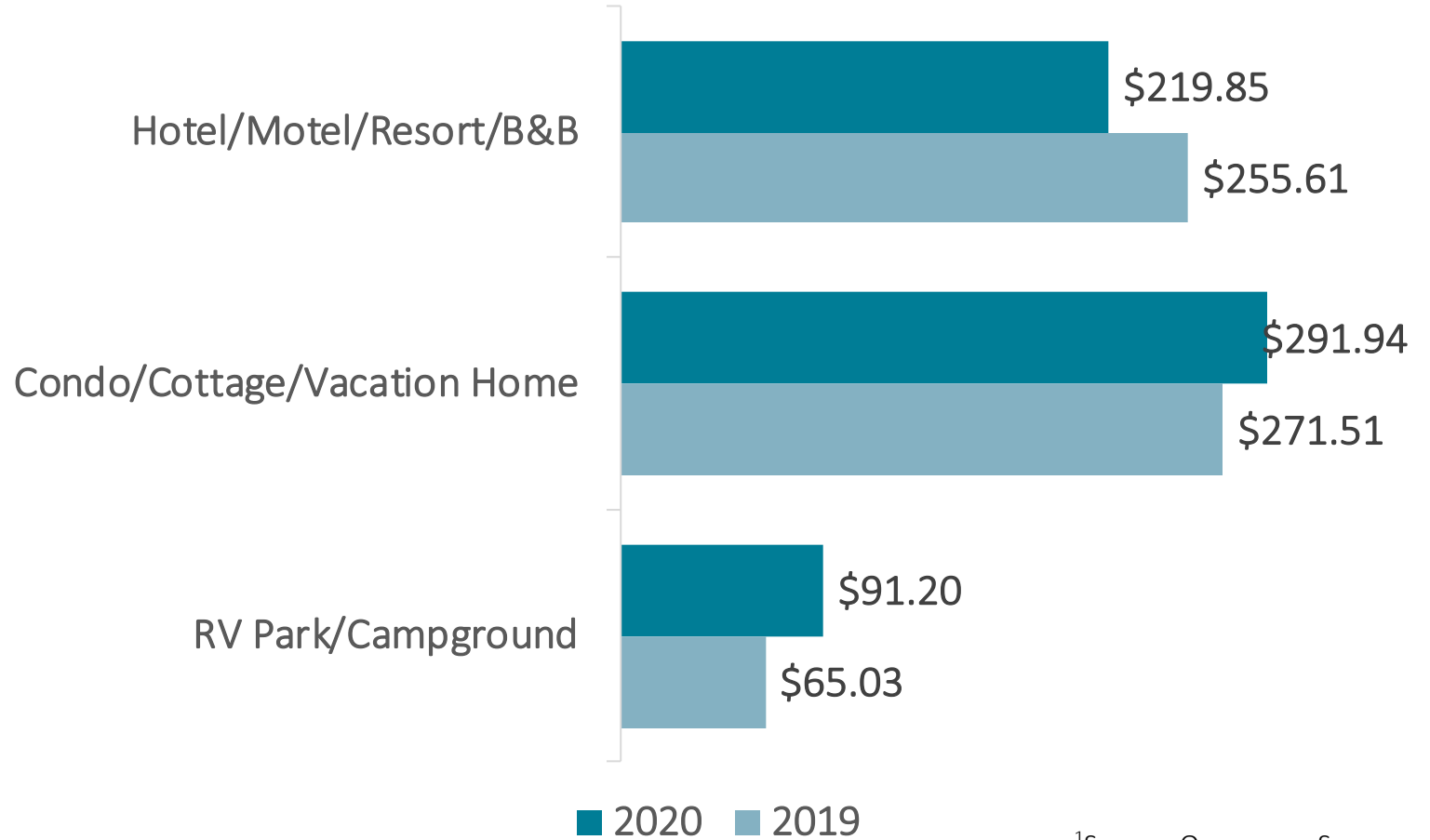
Average occupancy in Jan – Mar was **78.2%¹** (86.3% in 2019).



¹Source: Occupancy Survey

ADR

ADR in Jan – Mar was **\$196.19¹** (\$213.96 in 2019).

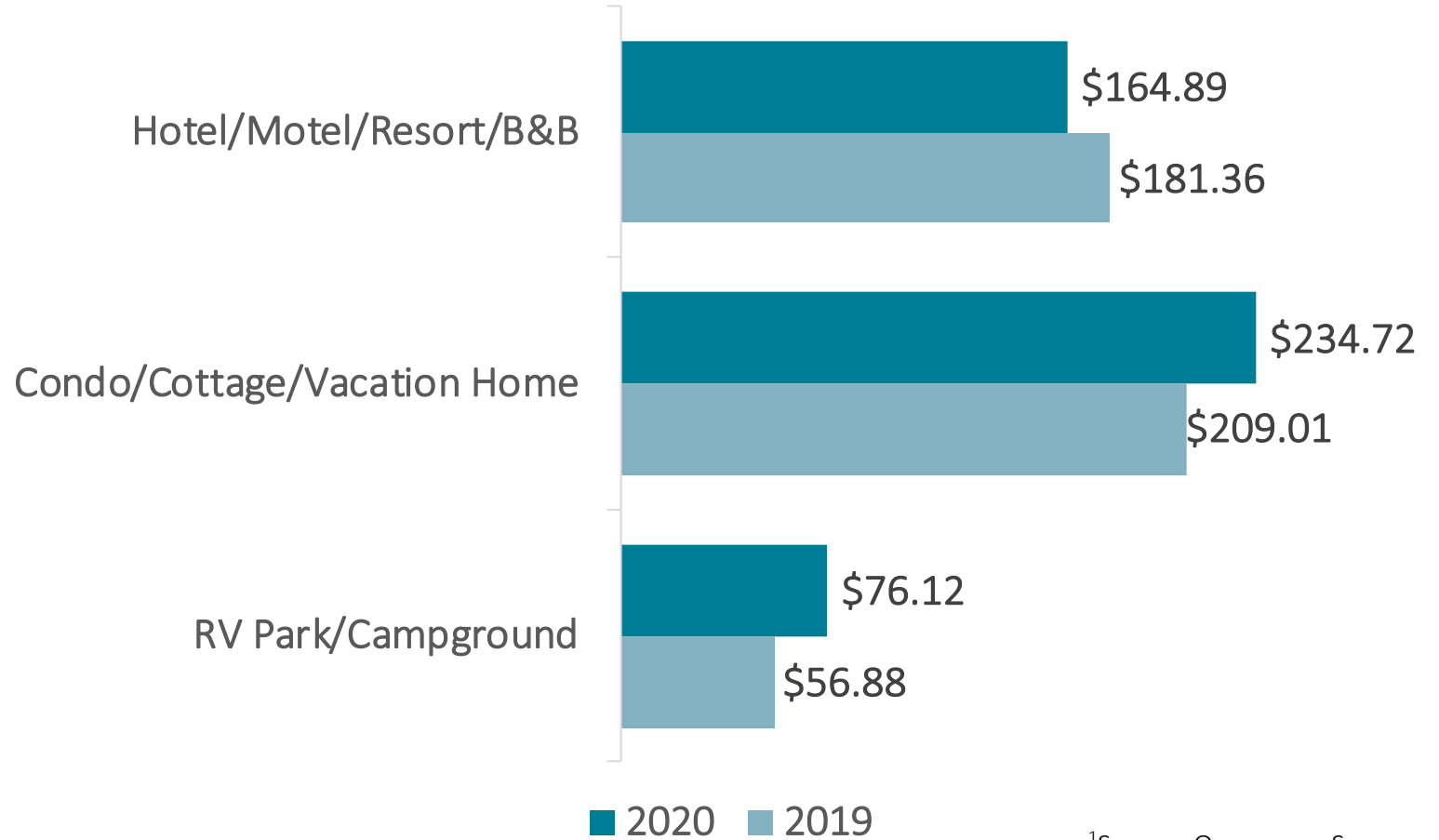


¹Source: Occupancy Survey

RevPAR



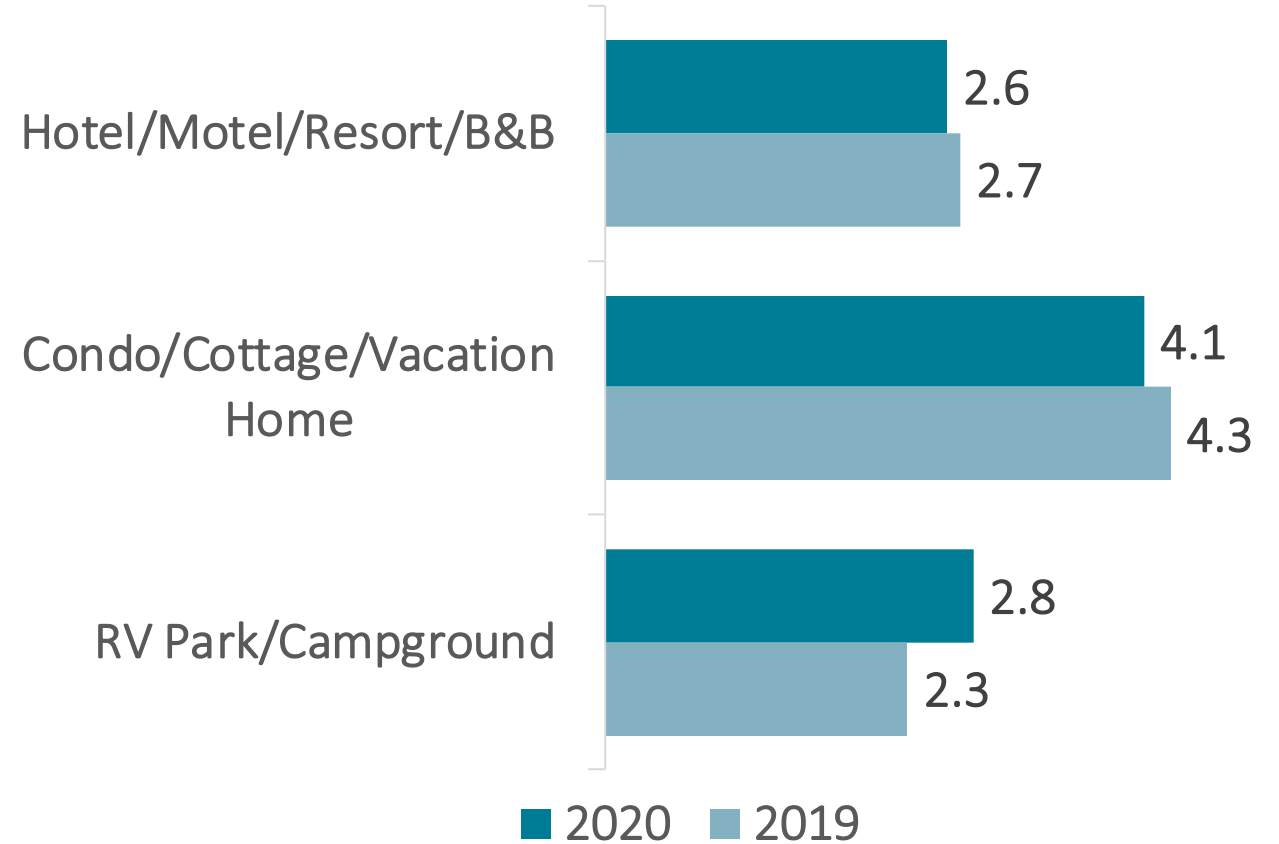
Average RevPAR in Jan – Mar was **\$153.42¹** (**\$188.01** in 2019).



¹Source: Occupancy Survey

Travel Party Size

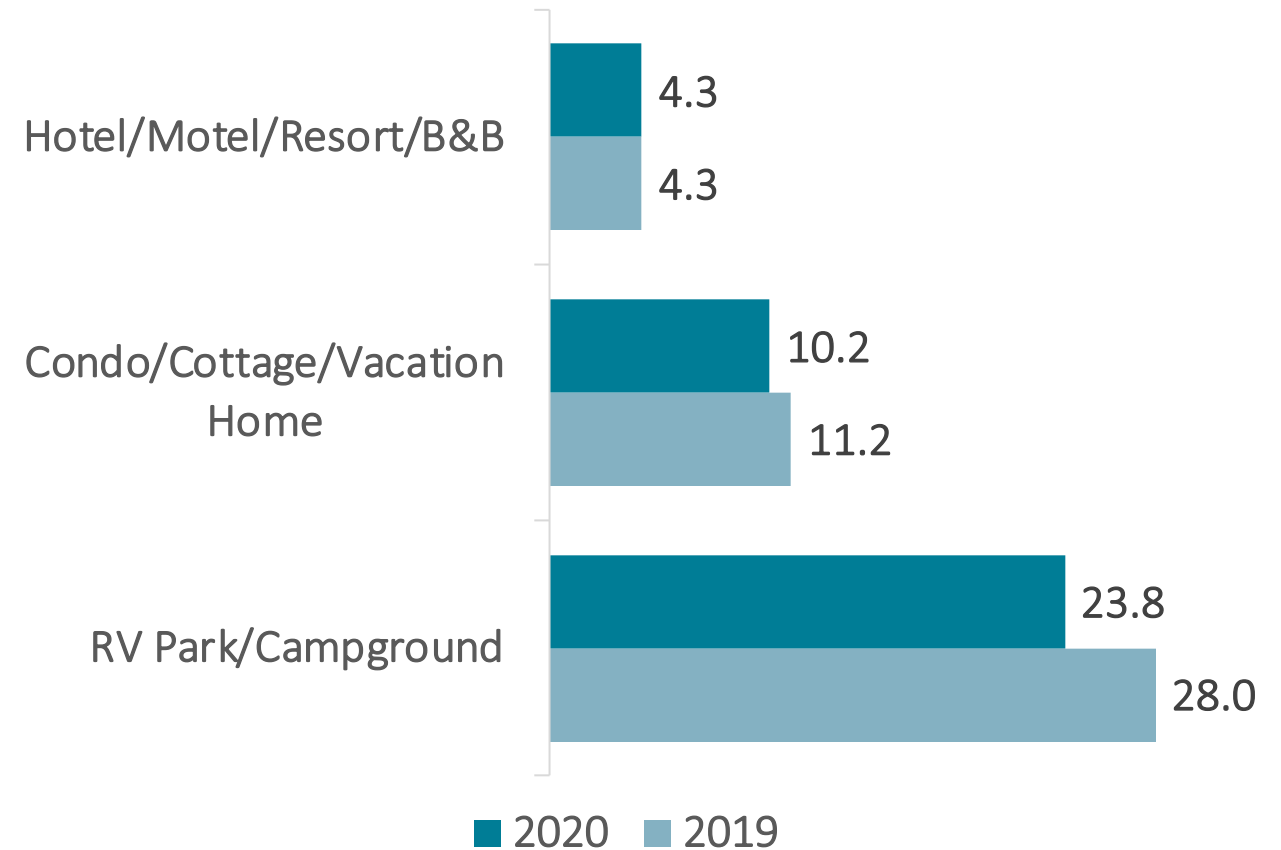
For visitors in paid accommodations, average travel party size in Jan – Mar was **2.9 people¹** (3 people in 2019).



¹Source: Occupancy Survey

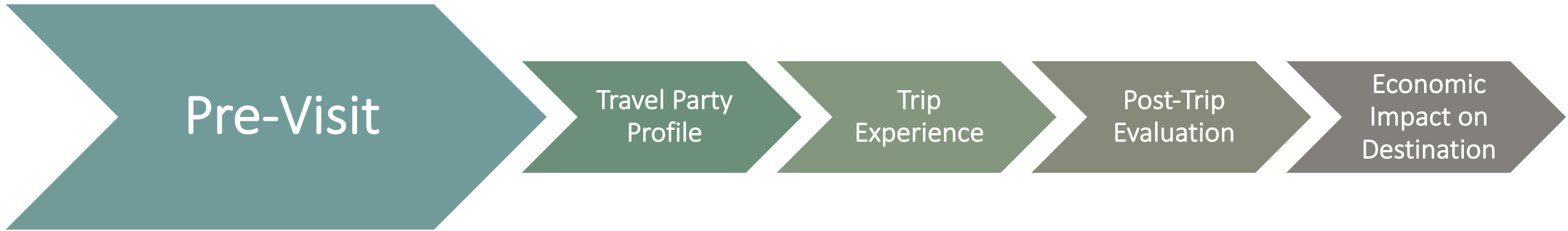
Length of Stay

For visitors in paid accommodations, average length of stay in Jan – Mar was **7.4 nights¹** (7.0 nights in 2019).



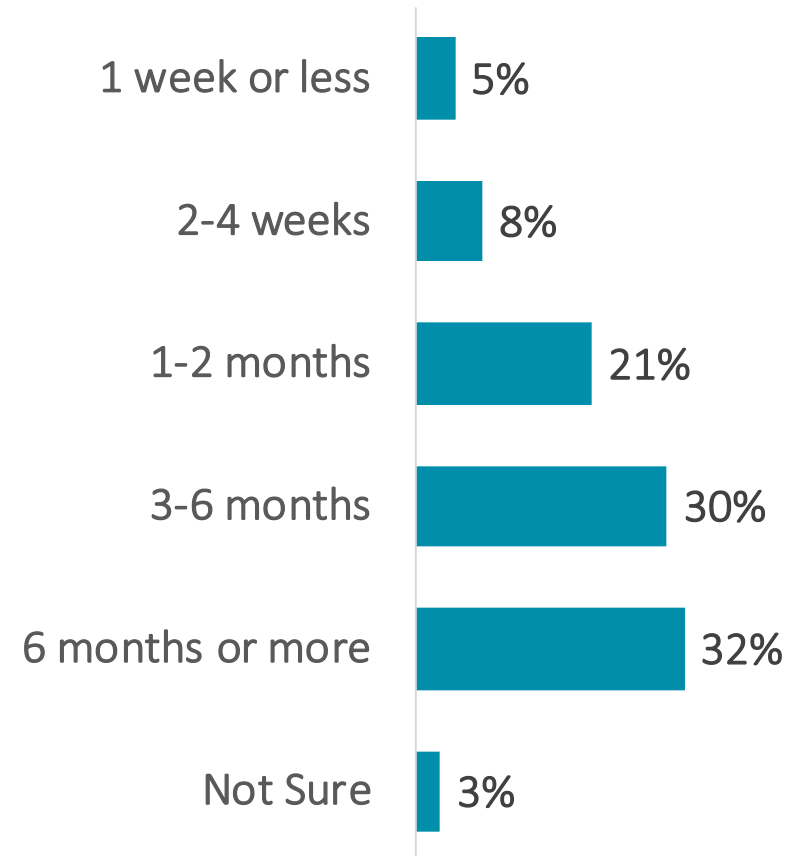
¹Source: Occupancy Survey

Visitor Journey: Pre-Visit



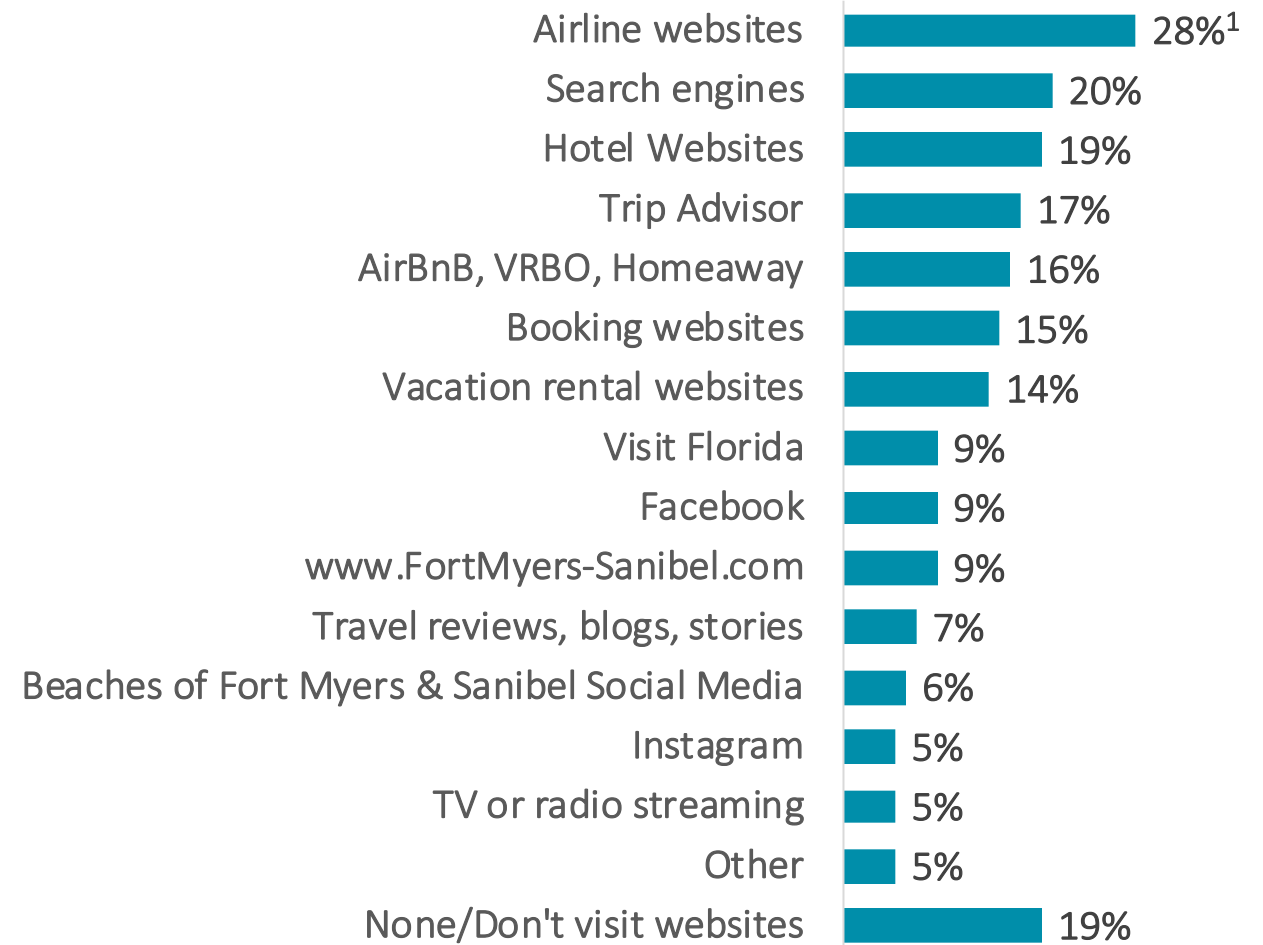
Trip Planning Cycle

Over **3 in 5** visitors planned their trip at least 3 months in advance, while only **13%** planned their trip less than a month in advance.



Trip Planning: Websites Used

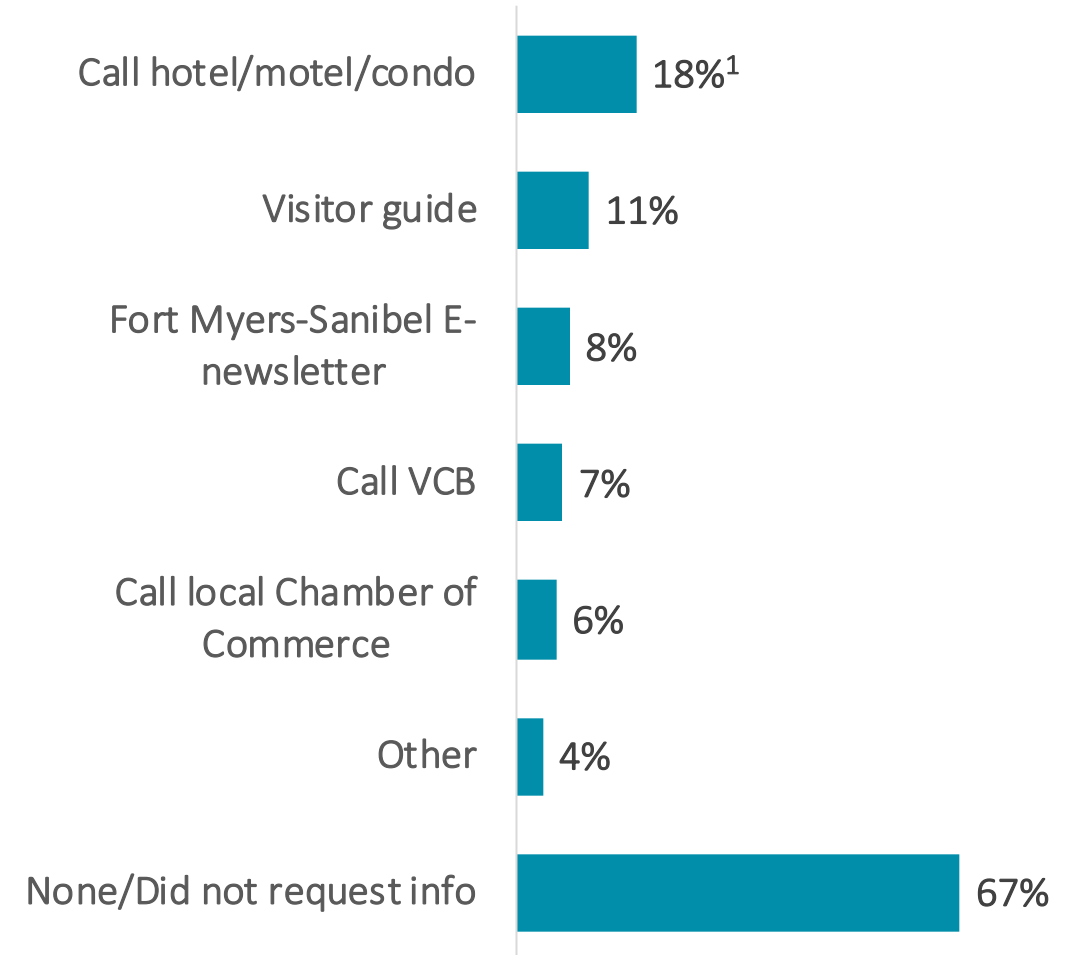
8 in 10 visitors used websites to plan their trip to The Beaches of Fort Myers & Sanibel.



¹Multiple responses permitted.

Trip Planning: Information Requests

1 in 3 visitors made information requests to plan their trip to The Beaches of Fort Myers & Sanibel.



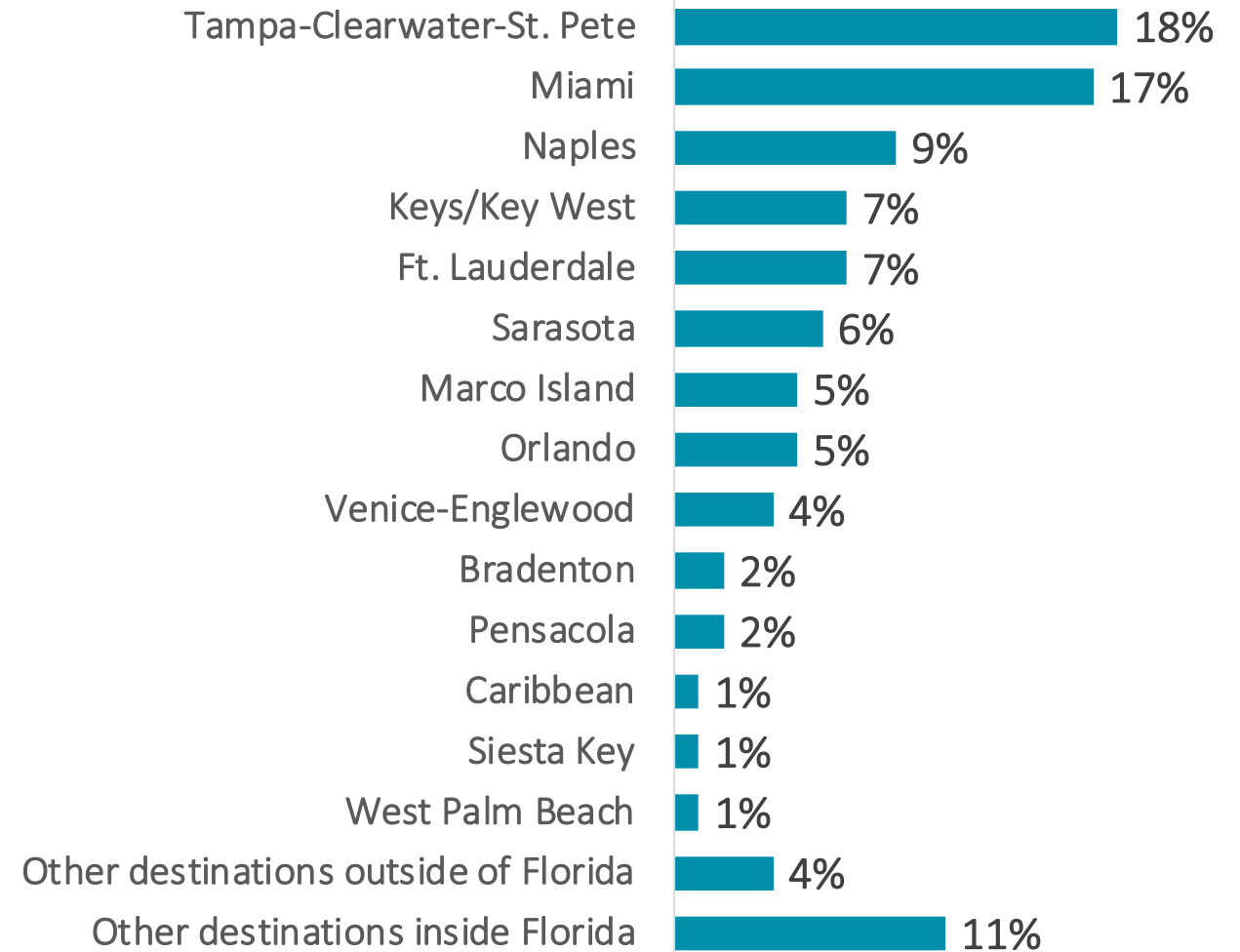
¹Multiple responses permitted.

Trip Planning: Other destinations considered

16% of visitors considered choosing other destinations when planning their trips.

Almost all other destinations considered were in Florida.

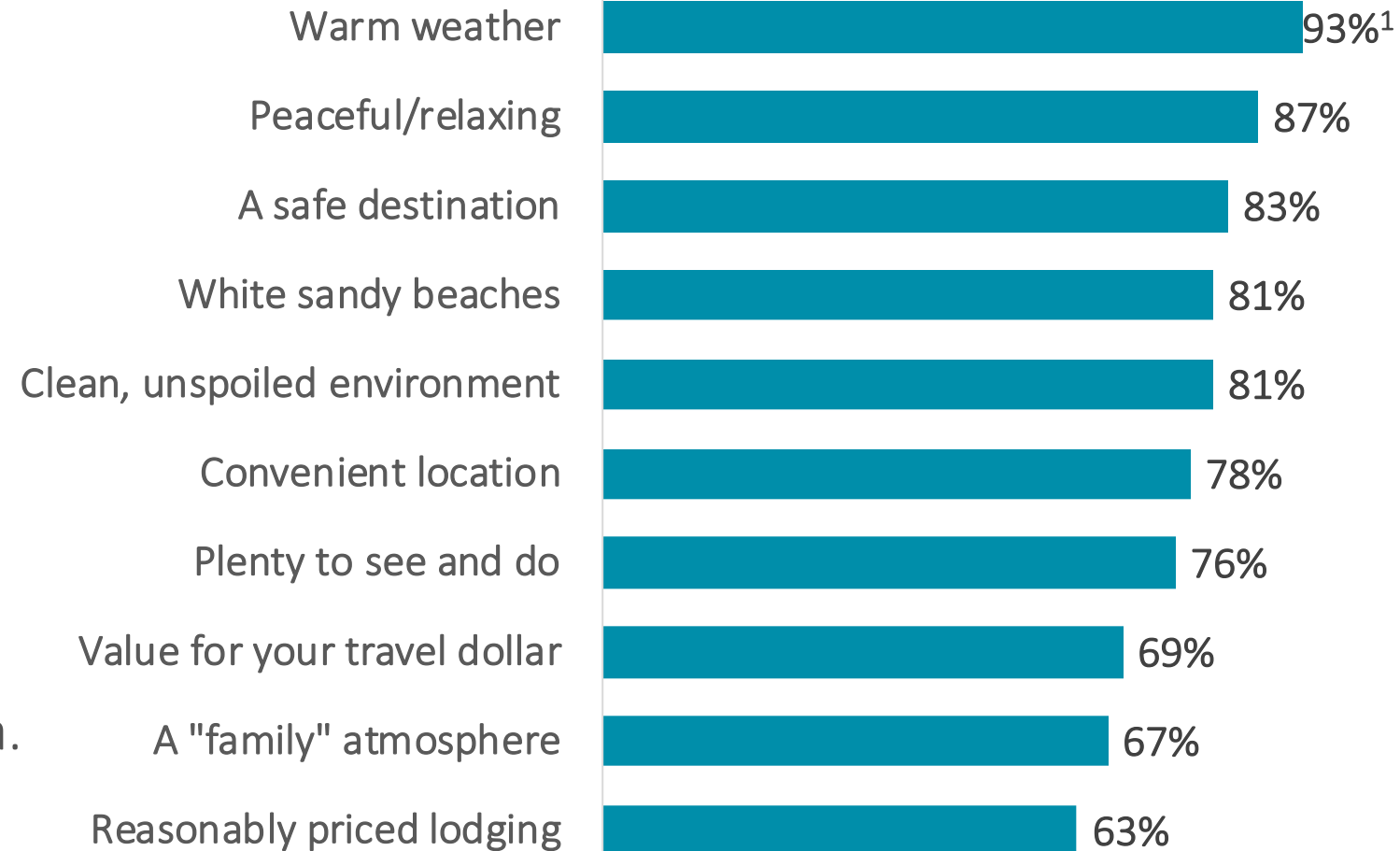
The Tampa Bay area and Miami were key competitors.



Trip Influencers

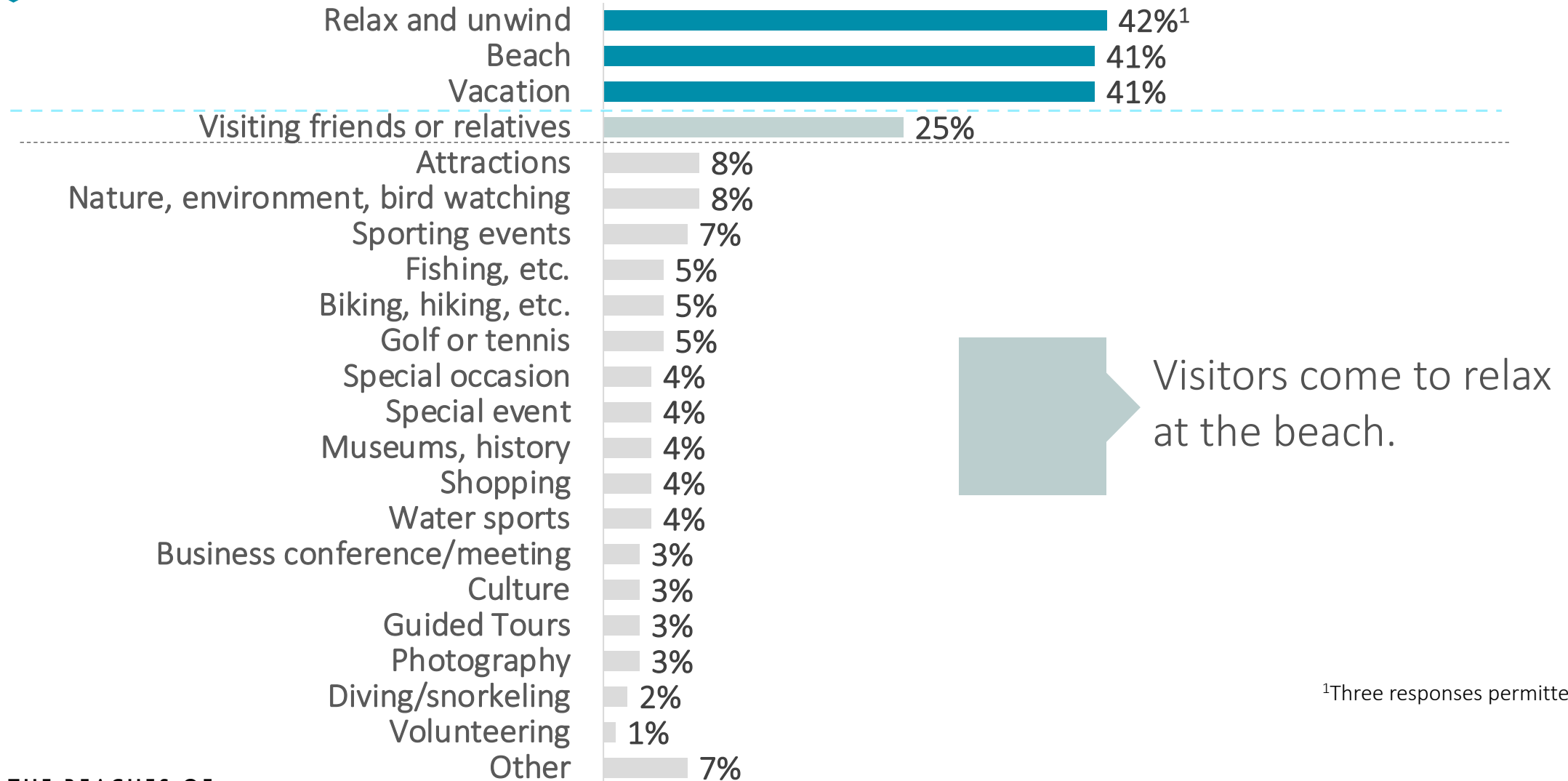
Nearly **9 in 10** visitors were heavily influenced by The Beaches of Fort Myers & Sanibel being warm and peaceful when thinking about visiting.

Price and value were not major considerations in deciding to come to the area.



¹Top 2 box scores. Attributes rated on a scale from 1 to 5 where 1 is Not at All Influential and 5 is Definitely Influential.

Reason for visiting

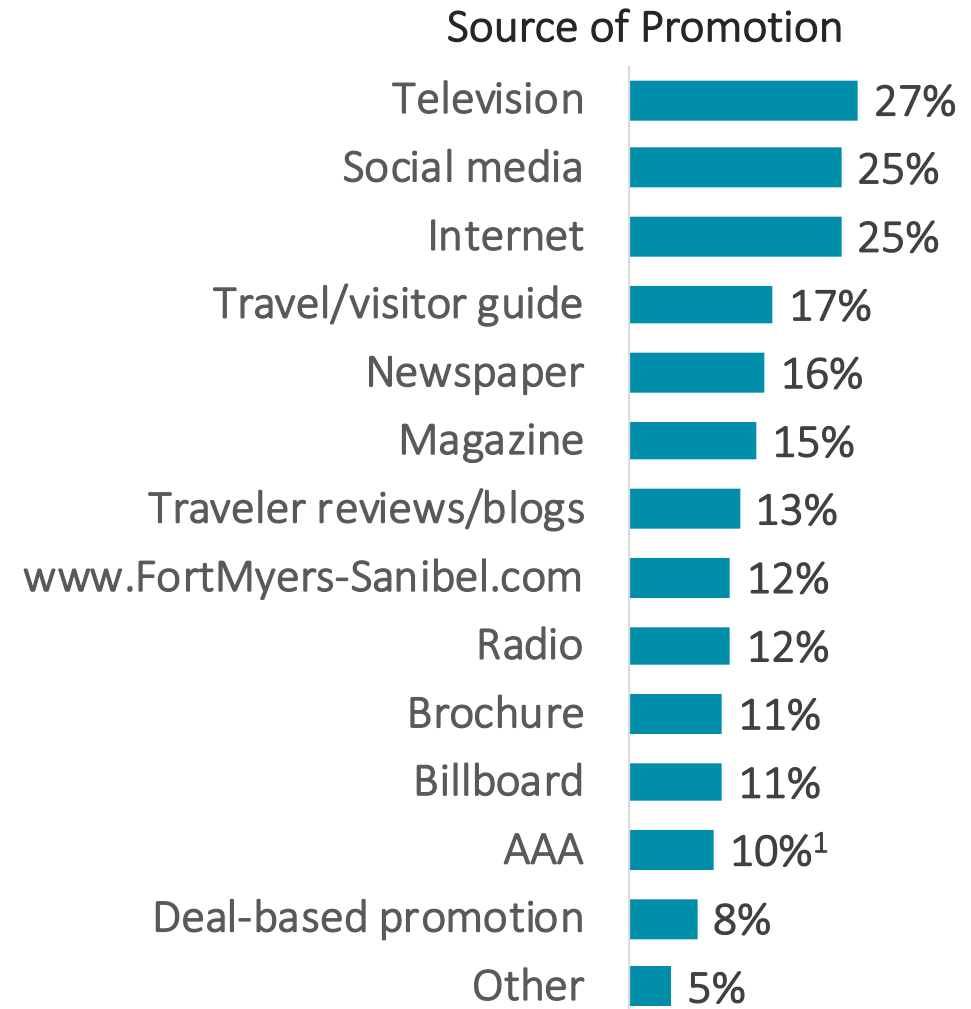


¹Three responses permitted.

Promotions

40% of visitors recalled promotions in the past 6 months for The Beaches of Fort Myers & Sanibel.

Unlike visitors to many other destinations, visitors to The Beaches of Fort Myers and Sanibel rely on traditional media as much as social media.

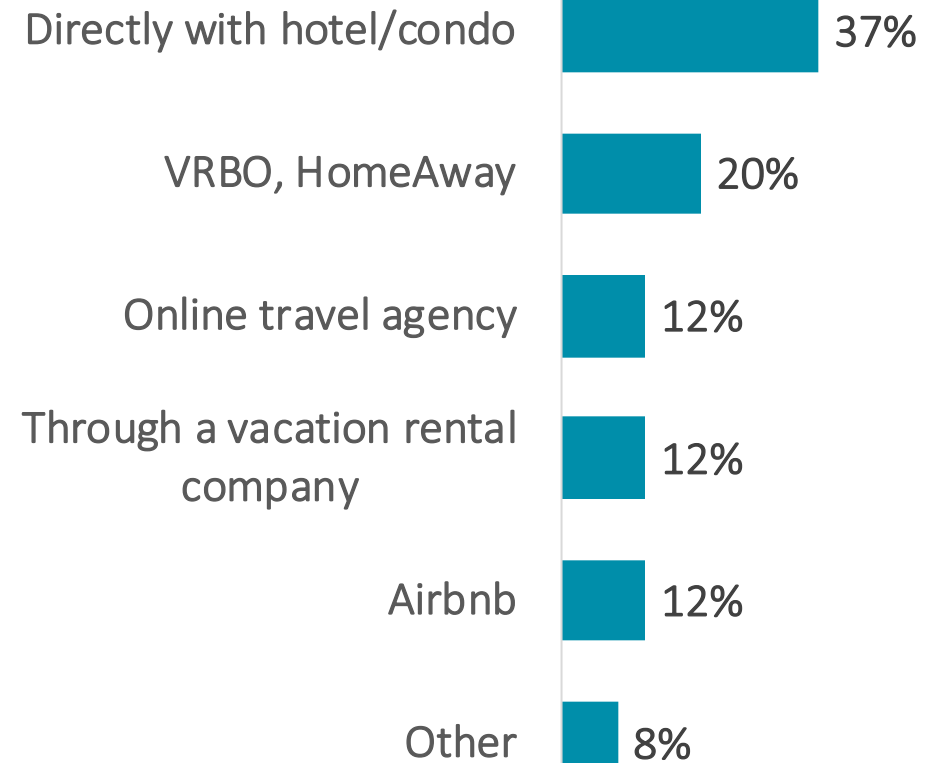


¹Multiple responses permitted.

Booking

More than a **third** of visitors who stayed in paid accommodations booked directly with a hotel/condo.

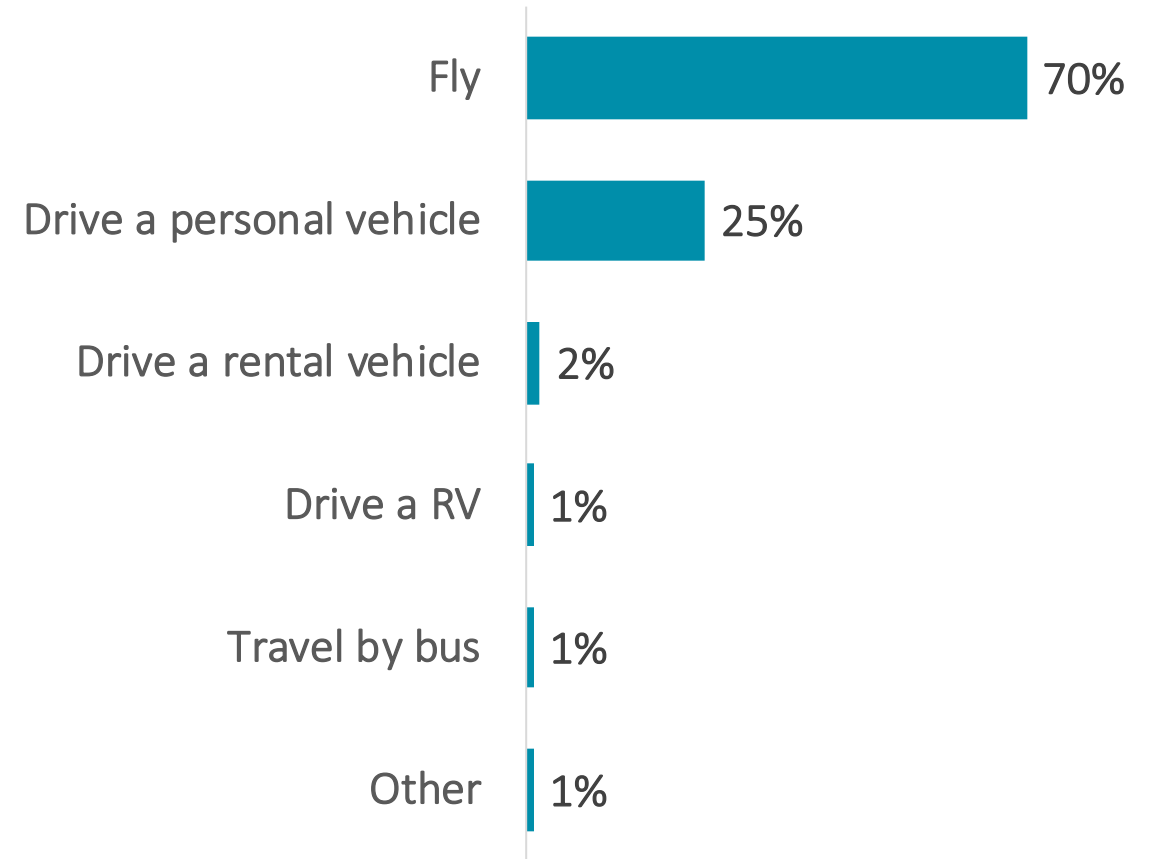
Another **third** of visitors booked with Airbnb, VRBO, and HomeAway.



Transportation



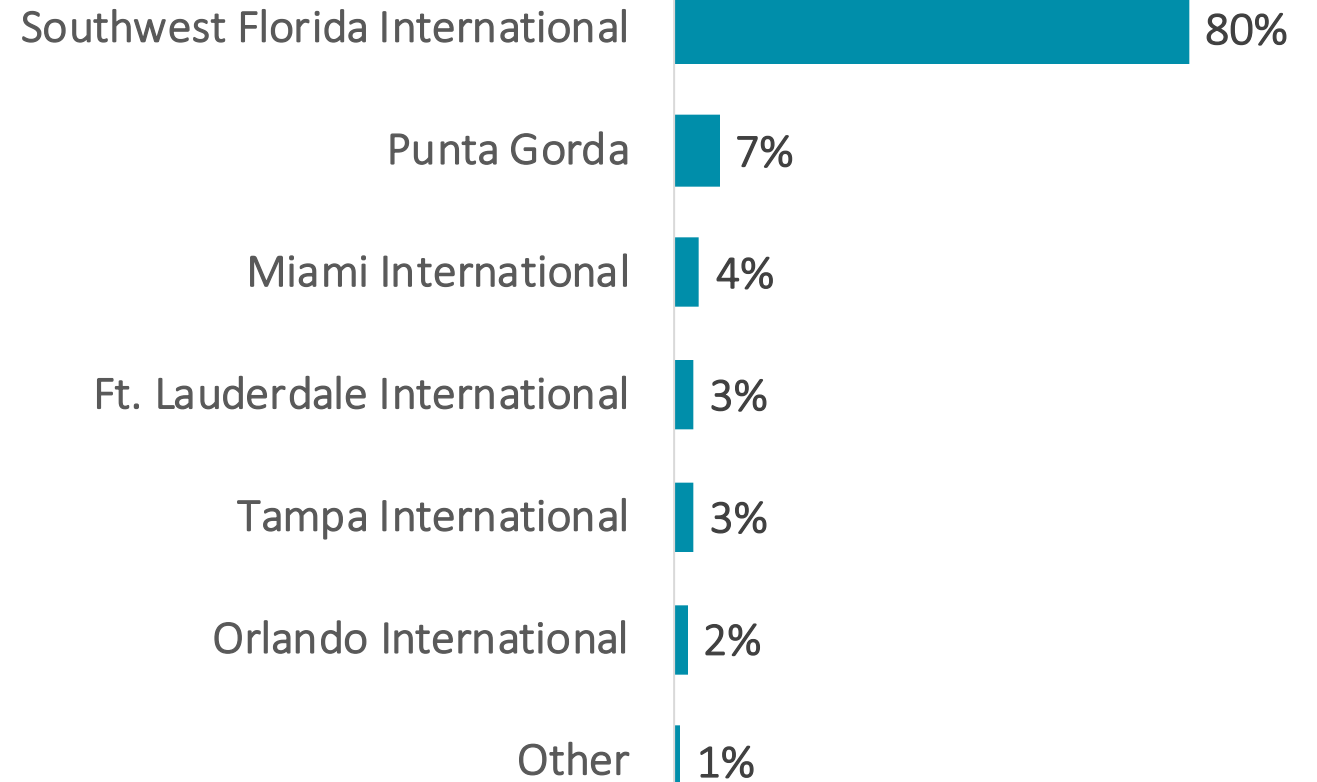
7 in 10 visitors flew to The Beaches of Fort Myers & Sanibel.



Airport



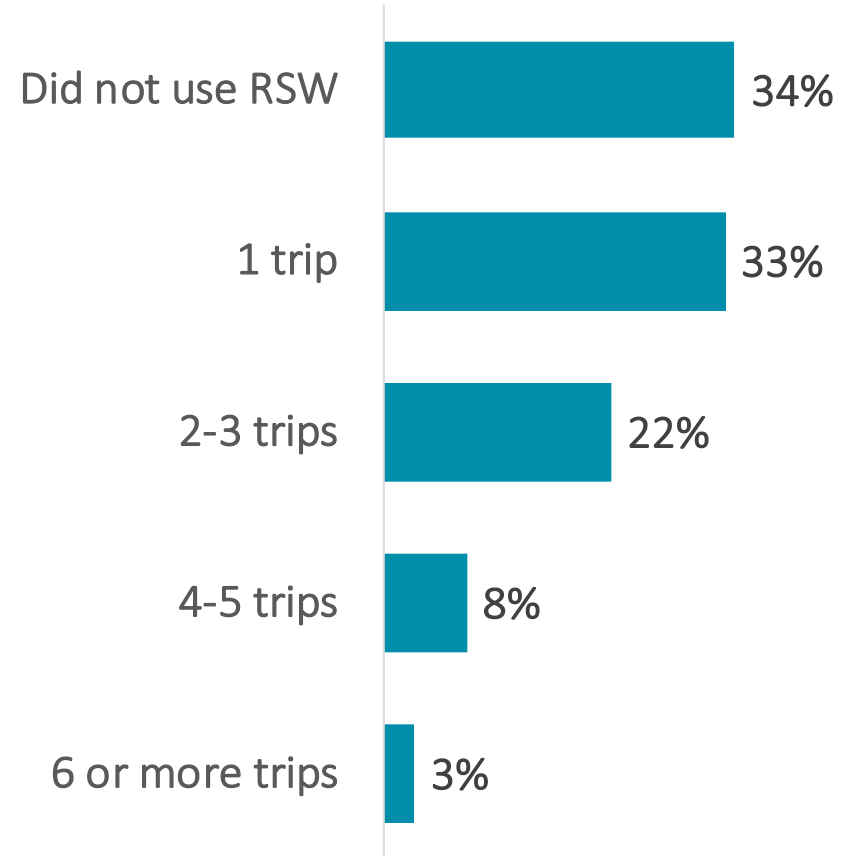
8 in 10 visitors who flew to The Beaches of Fort Myers & Sanibel came through RSW.



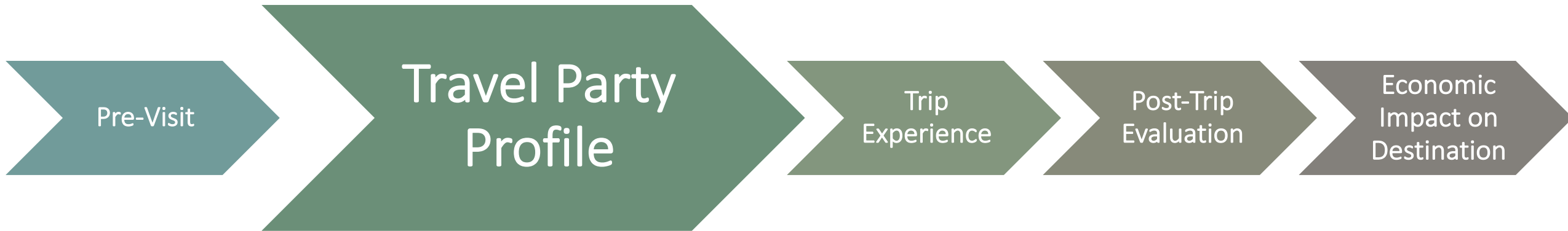
Used RSW in the Past Year



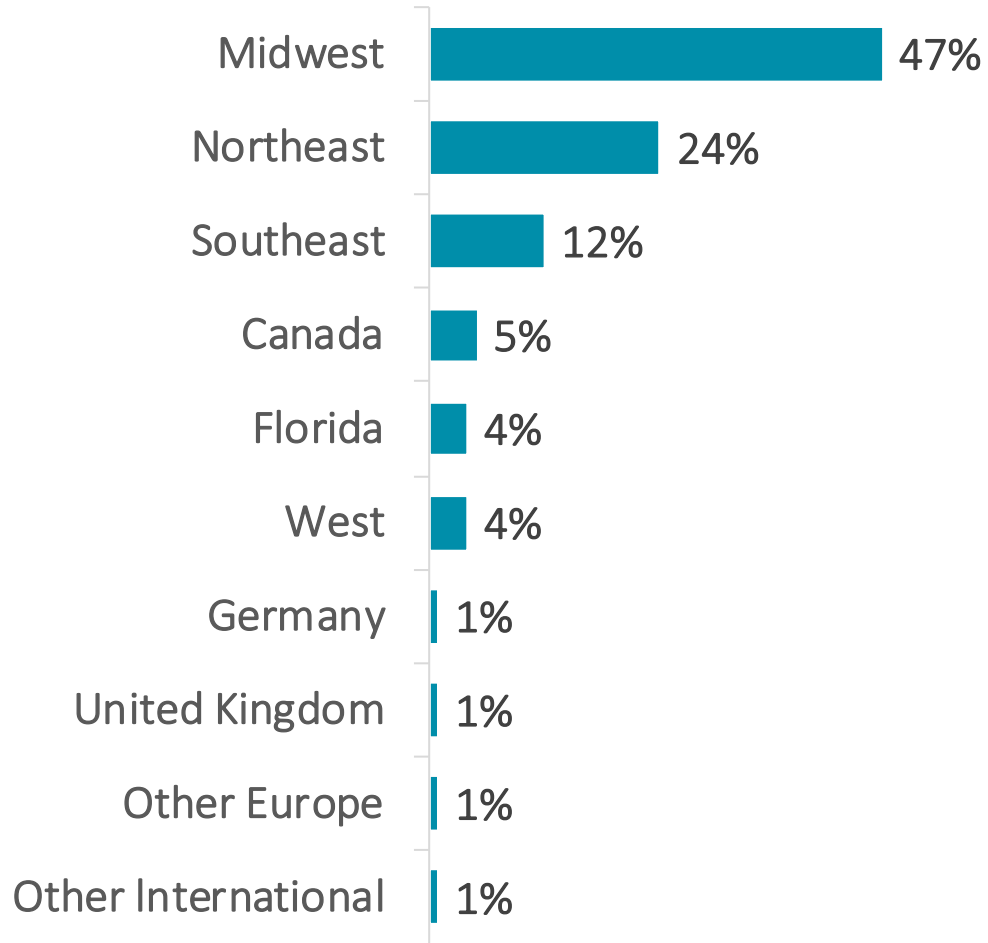
66% of visitors used RSW at least once in the past year.



Visitor Journey: Travel Party Profile

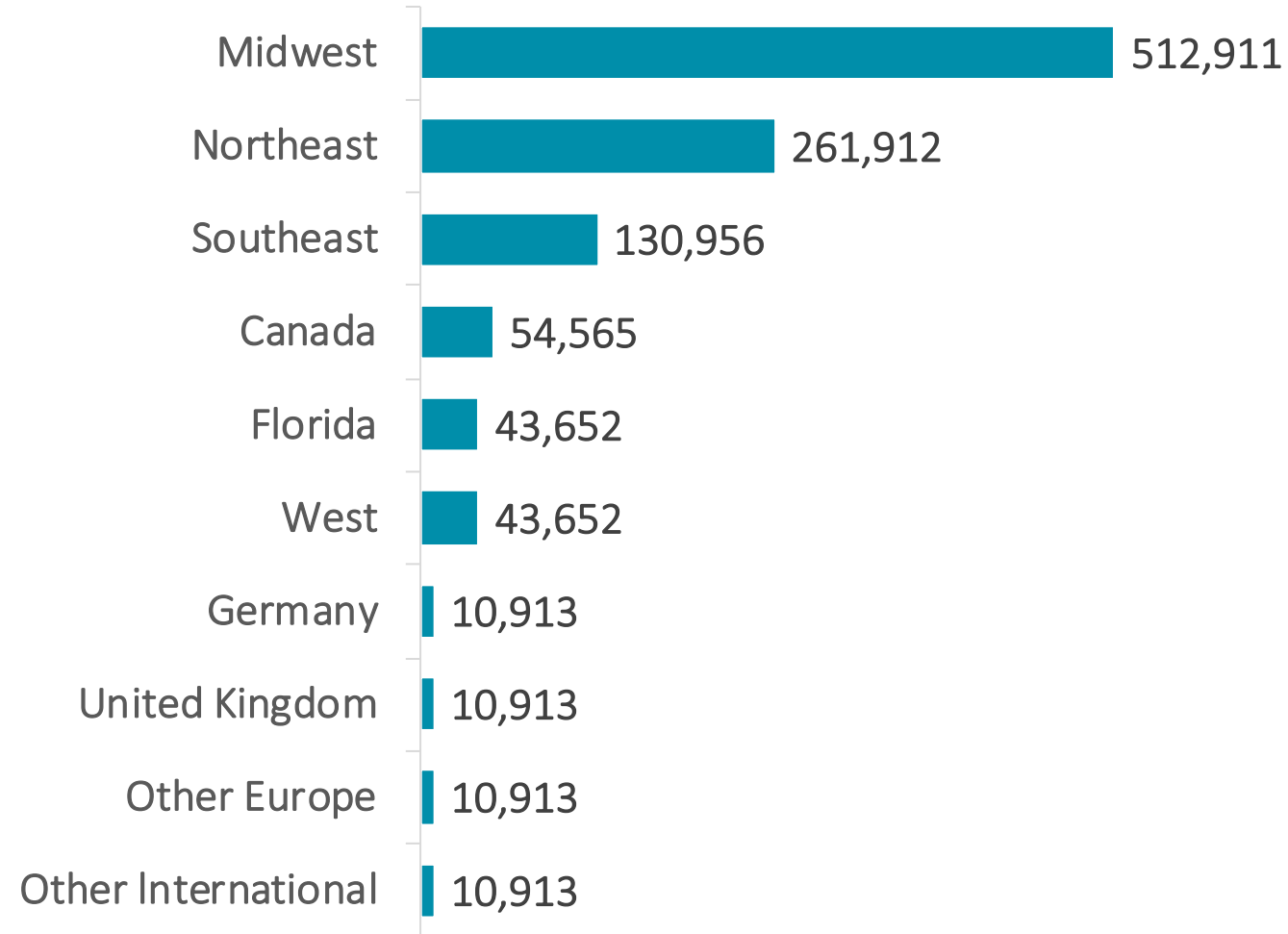


Origin¹

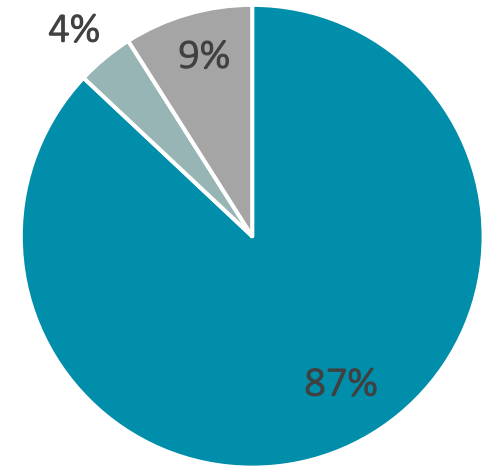
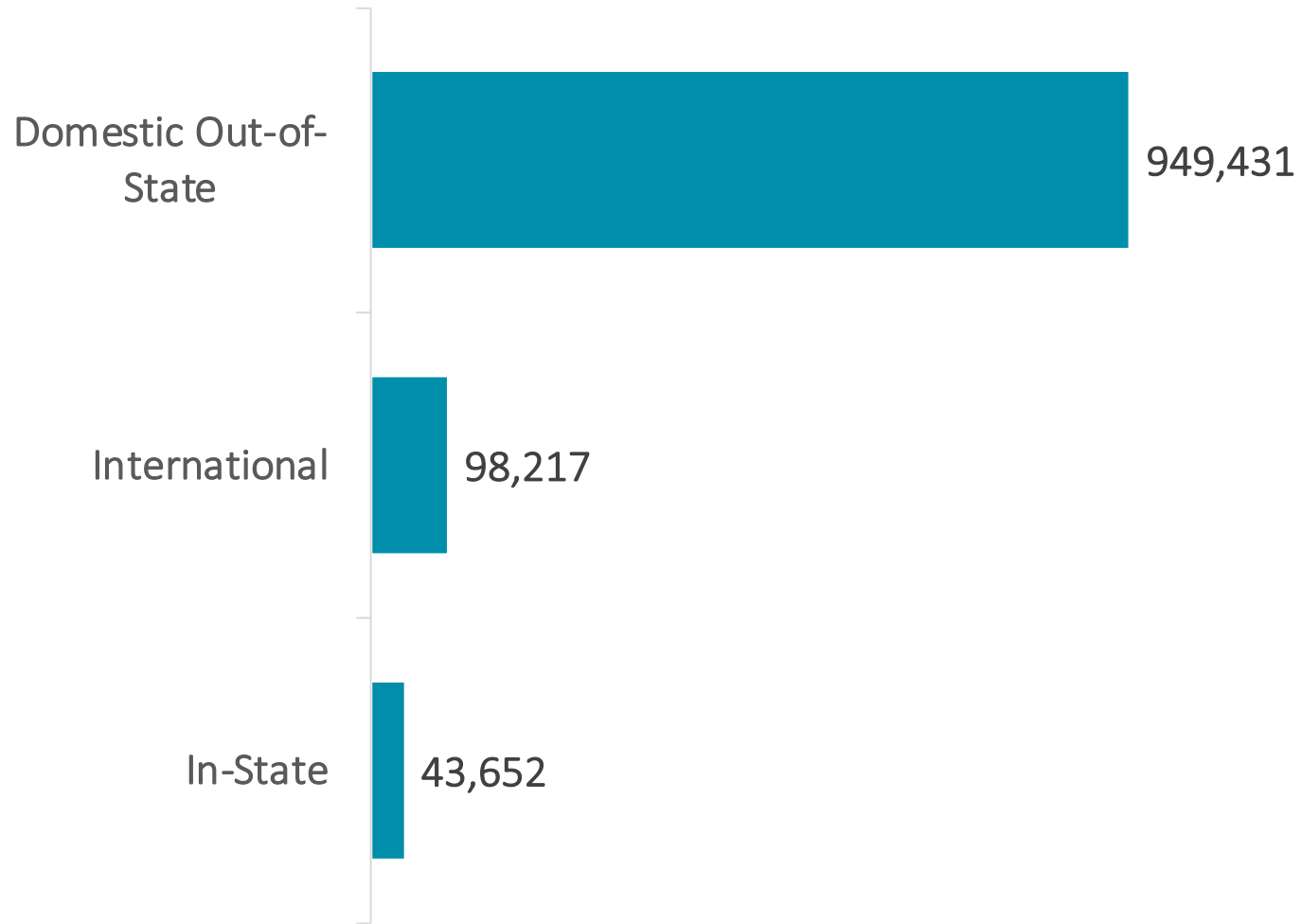


¹Includes visitors who stayed in paid accommodations, VFRs, and day trippers.

Number of Visitors by Origin



Number of Visitors by Origin



- Domestic Out-of-State
- In-State
- International

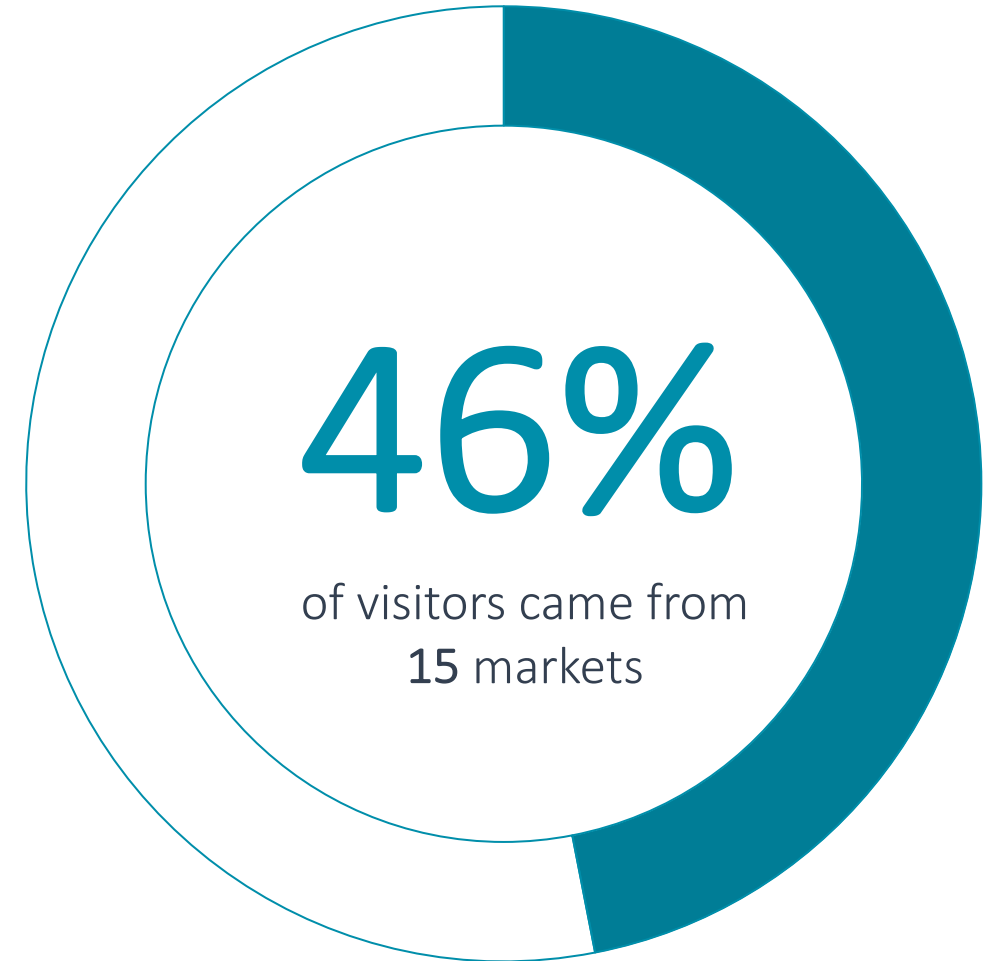
Origin Country

Country ¹	% of Visitors
United States	91%
Canada	5%
Germany	1%
United Kingdom	1%
Other	2%

¹1% or fewer visitors came from Australia, Belgium, Catalonia, Columbia, Greece, Ireland, The Netherlands, Sweden, Switzerland, and Venezuela.

Origin Markets¹

Market	Percentage of Visitors
Minneapolis-Saint Paul	7%
New York	5%
Boston	4%
Cincinnati	4%
Detroit	4%
Chicago	3%
Washington D.C.	3%
Green Bay-Appleton, WI	3%
Indianapolis	3%
Nashville	2%
Grand Rapids	2%
Philadelphia	2%
Cleveland-Akron	2%
Milwaukee	1%
Columbus, OH	1%



¹Includes visitors who stayed in paid accommodations, VFRs, and day trippers.

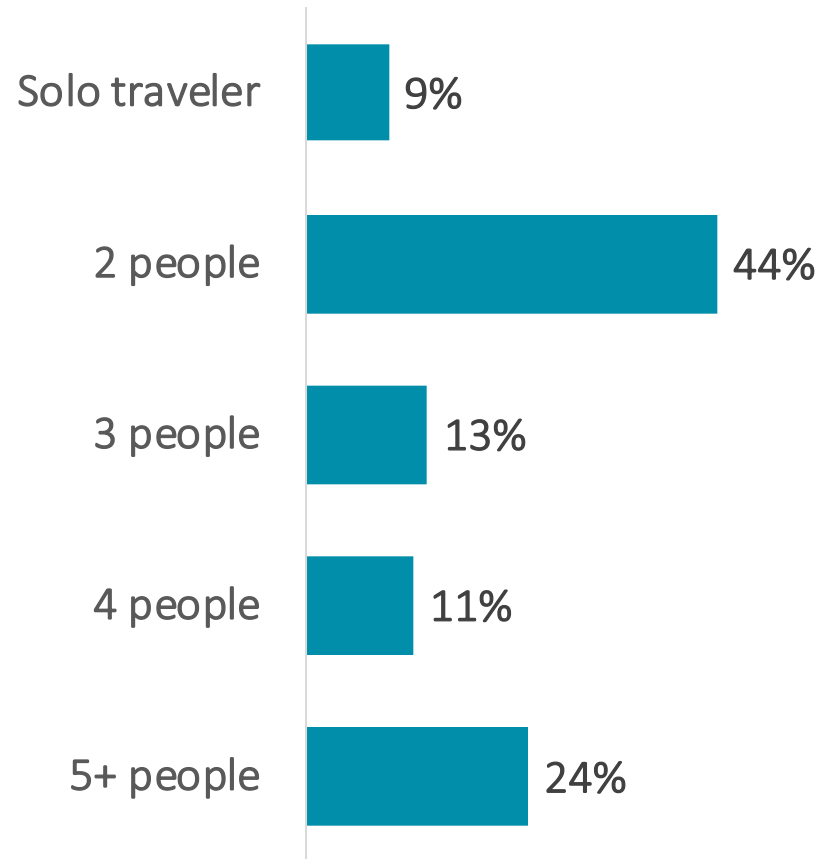
Travel Party Size and Composition

Travel Party Size

Visitors traveled in a party composed of **3.1¹** people.

Travel with Children

22% of visitors traveled with children under the age of 18.

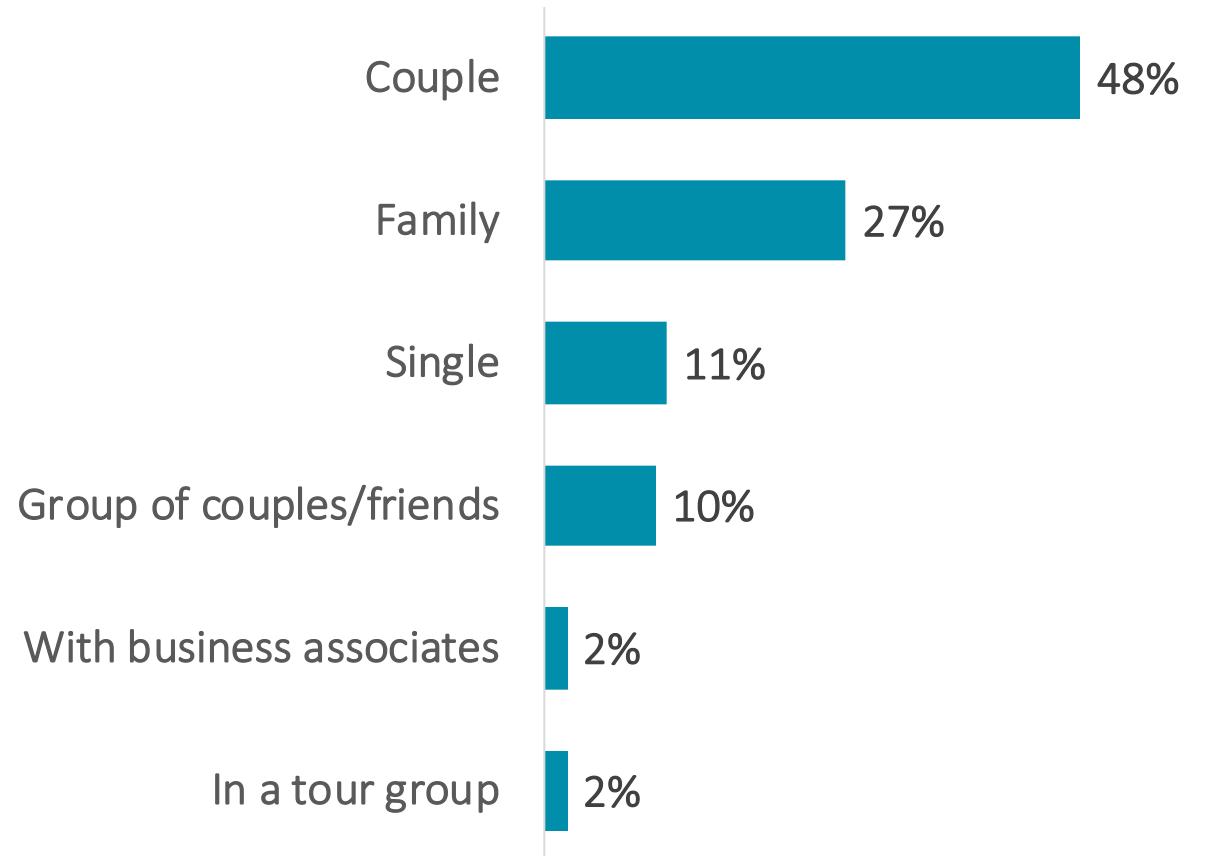


¹Source: Visitor Tracking Survey, includes all types of visitors

Travel Party Type



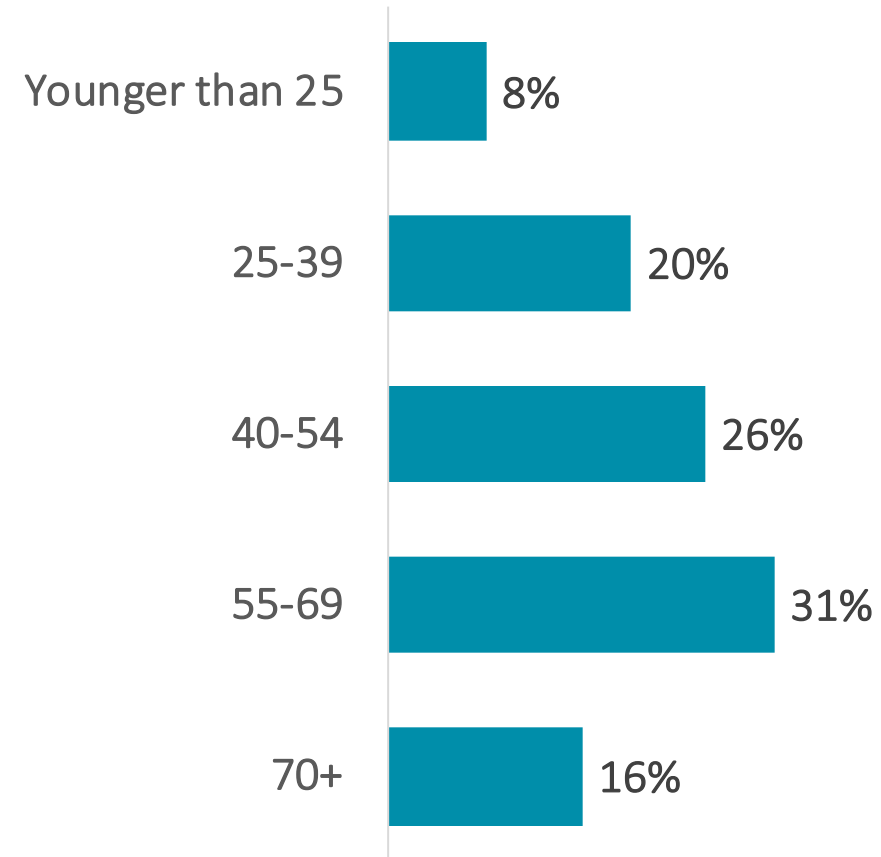
48% of visitors traveled as a couple, while **27%** traveled as a family.



Age

Average Age

The average age of Jan – Mar visitors was **53 years old.**



Household Income

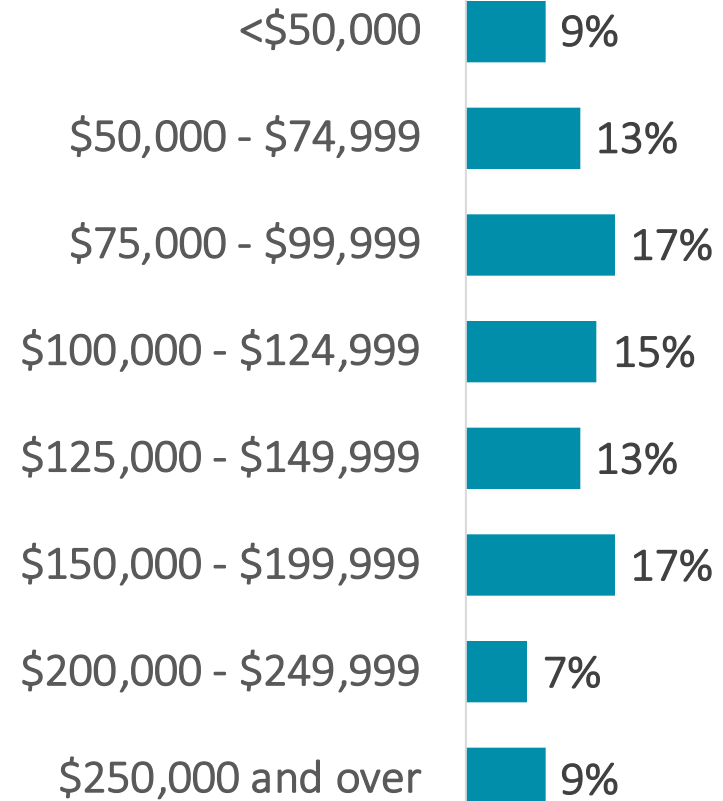
Median Household Income

Jan – Mar visitors had a median household income of **\$118,300**.

Estimate Average Household Income

The estimated average household income was **\$135,900**.

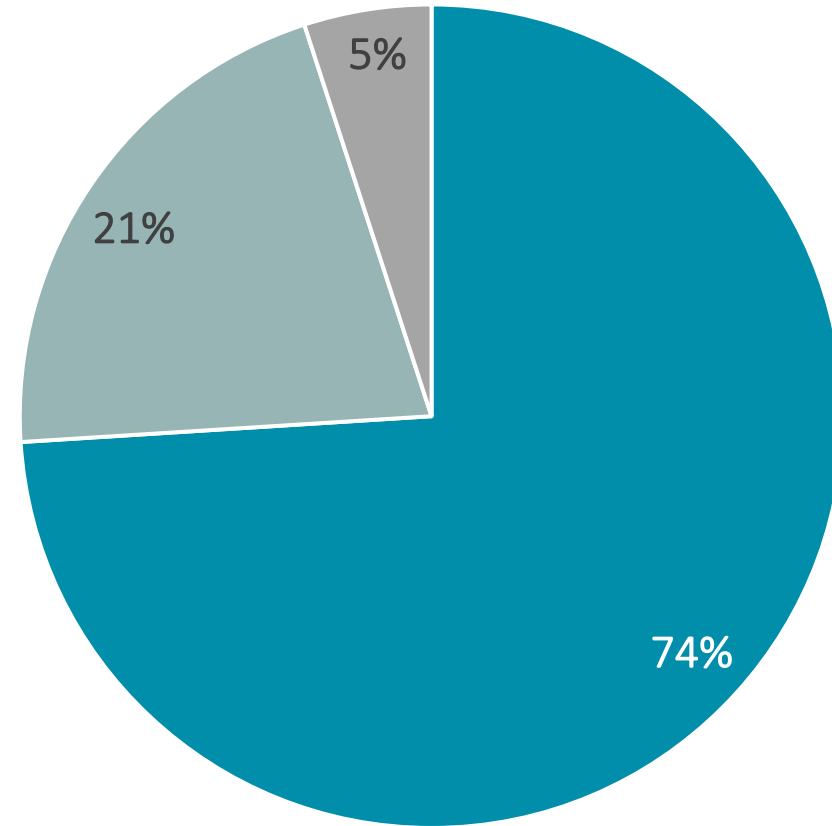
Income distribution is fairly uniform rather than bell shaped around the median. There are nearly equal numbers of visitors across all income categories.



Marital Status



Three out of four visitors to The Beaches of Fort Myers and Sanibel are married, but only 22% brought children with them to the destination.

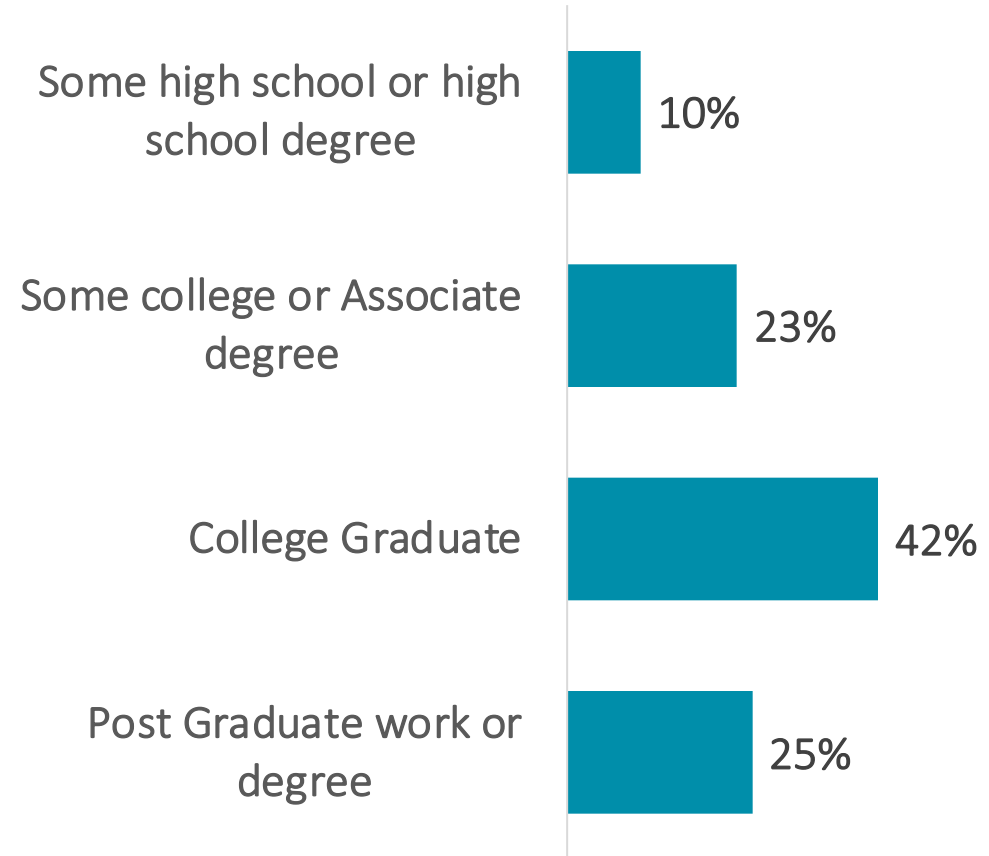


■ Married ■ Single ■ Other

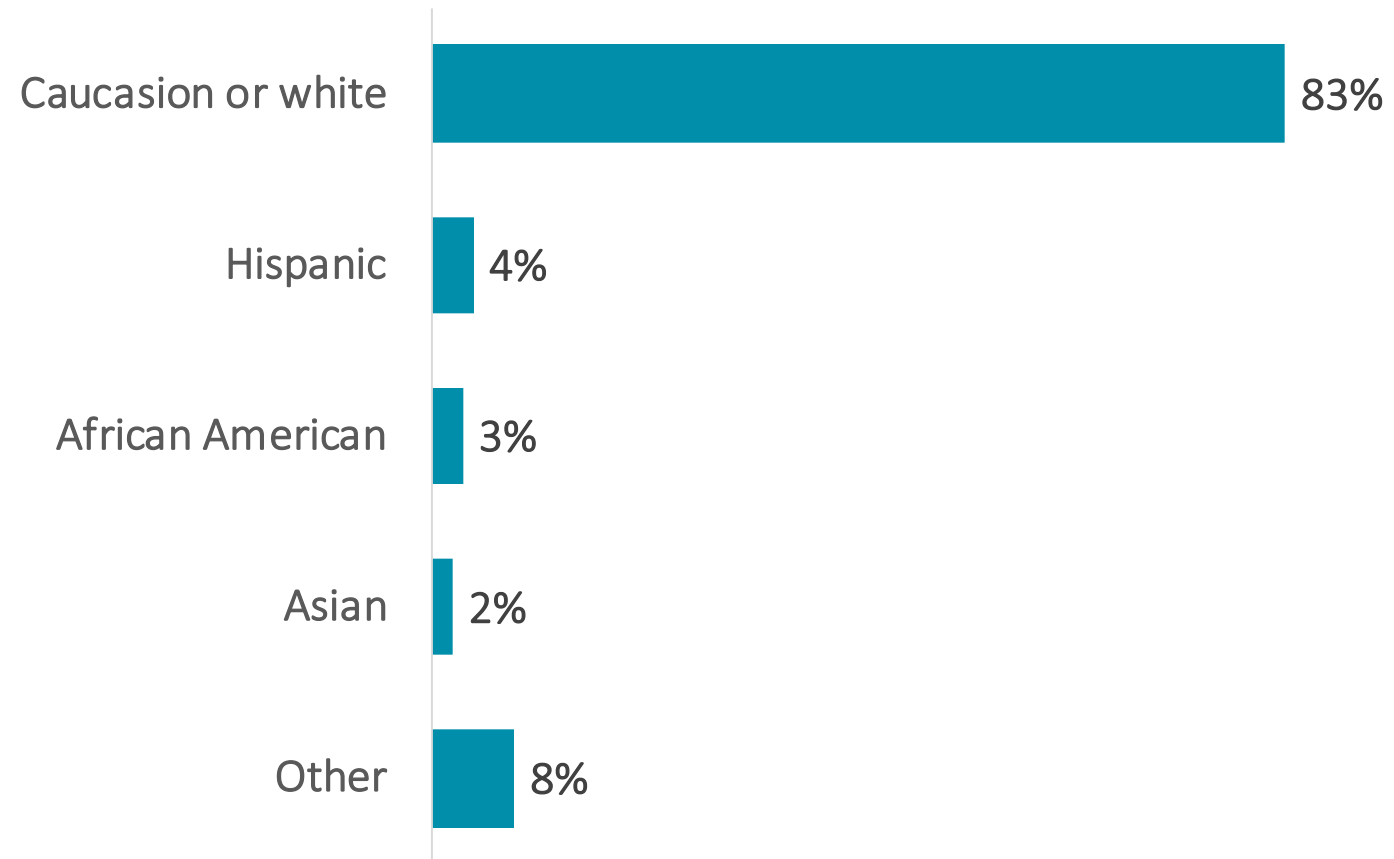
Education

College Education

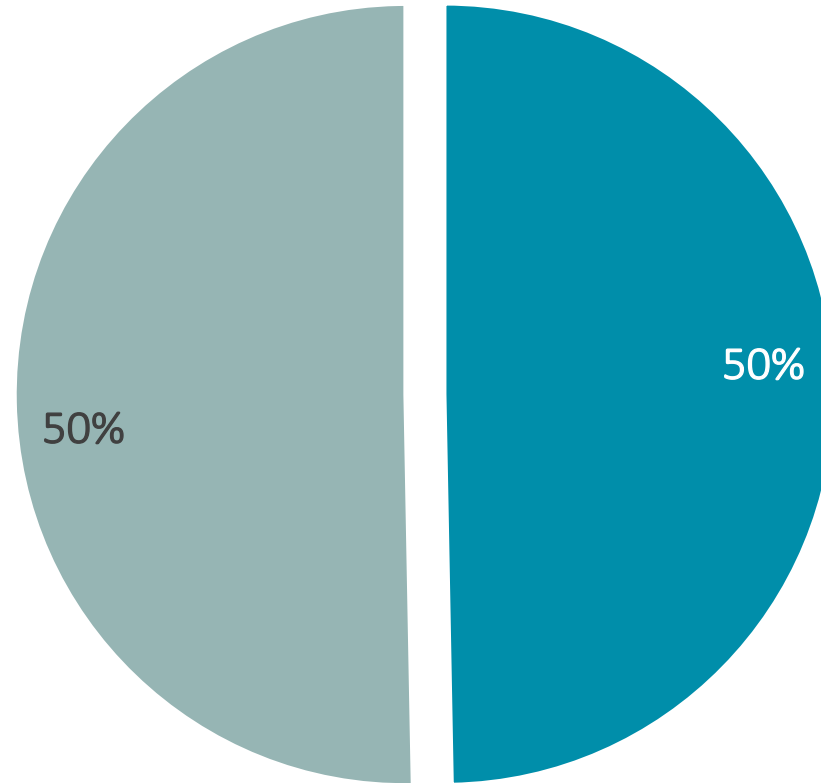
67% of Jan – Mar visitors were college graduates.



Race/Ethnicity



Gender



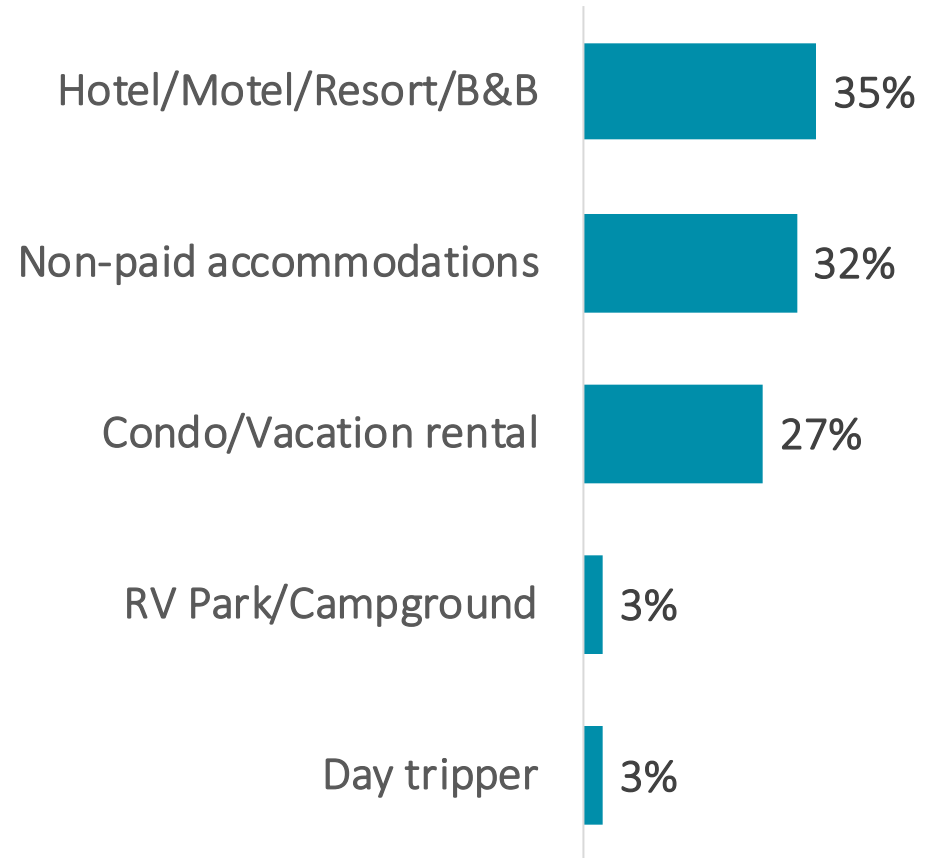
■ Male ■ Female

Visitor Journey: Trip Experience



Accommodations

3 in 5 visitors stayed in paid accommodations such as a hotel/motel/resort/B&B, condo/vacation rental, or a RV Park/Campground.



Nights Stayed

All Visitors

Visitors spent **10.5¹** nights in The Beaches of Fort Myers & Sanibel.

Visitors Staying in Paid Accommodations

Visitors staying in paid accommodations spent **8.0²** nights in The Beaches of Fort Myers & Sanibel.



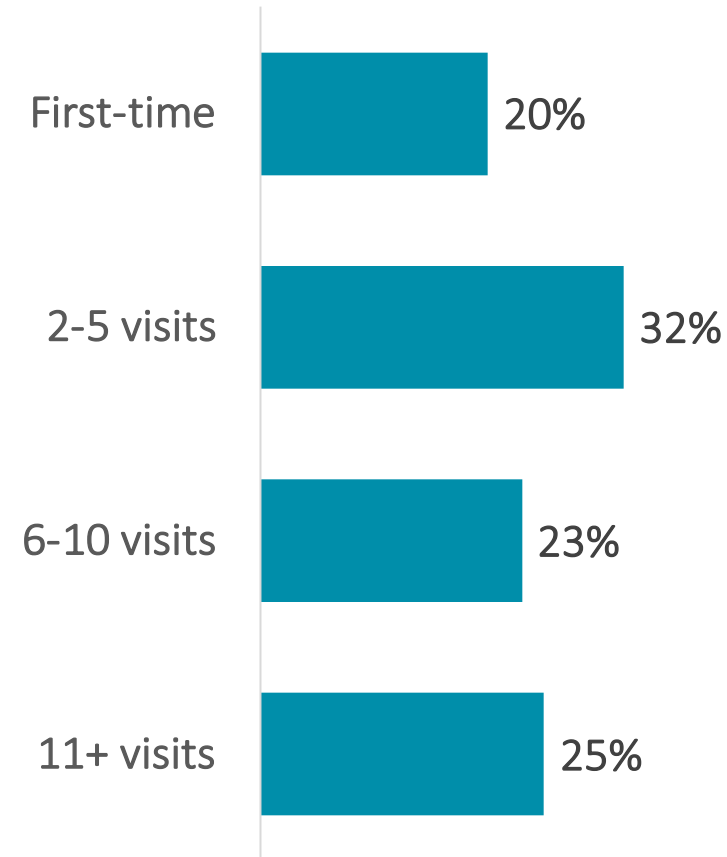
¹When including extended stay visitors, average nights stayed for all visitors was 11.7 nights. Source: Visitor Tracking Survey

²When including extended stay visitors, average nights stayed for visitors staying in paid accommodations was 10.0 nights. Source: Visitor Tracking Survey

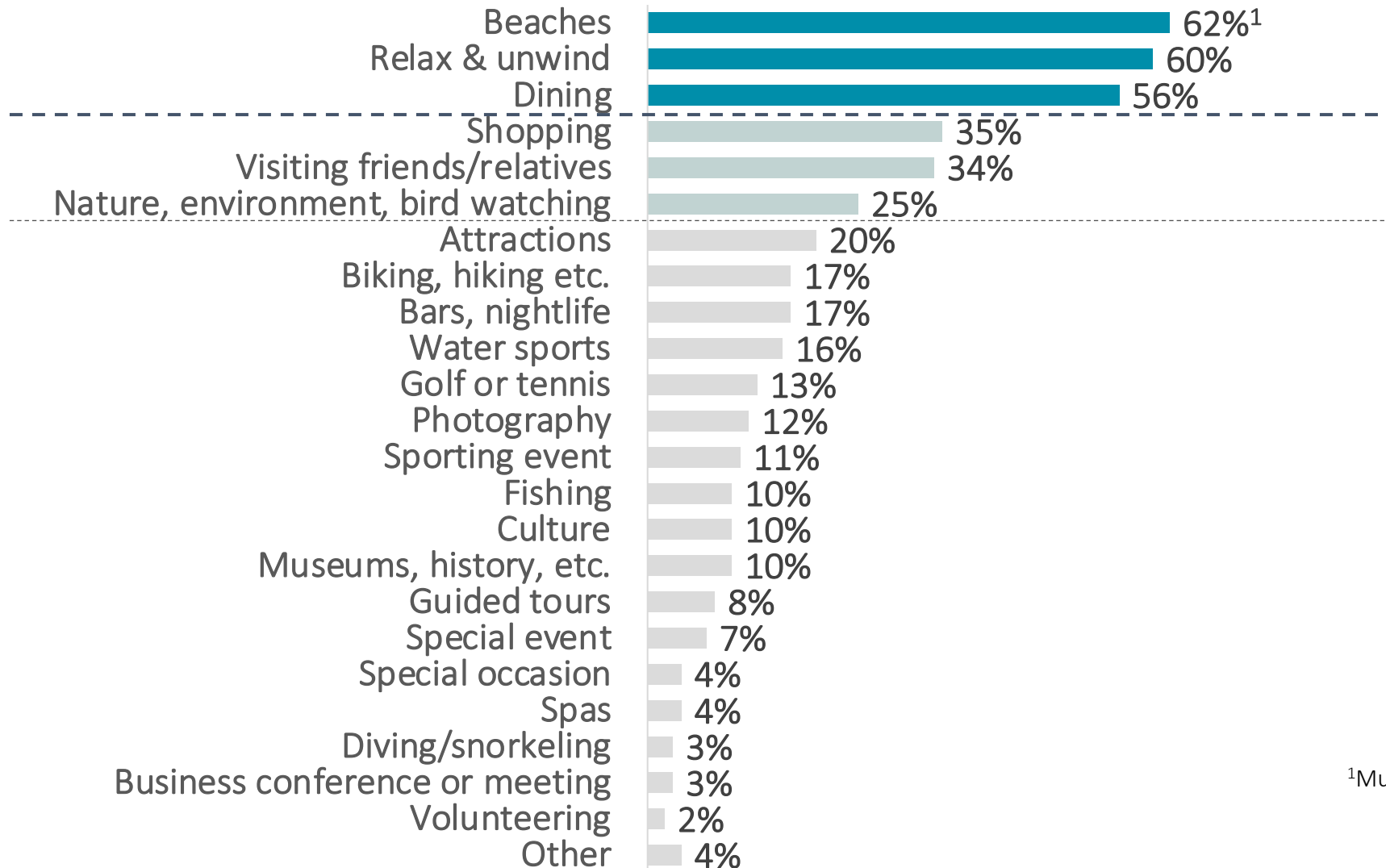
First Time and Experienced Visitors

First Time vs. Repeat Visitors

25% of visitors had made 11+ visits, while **20%** were visiting for the first time.



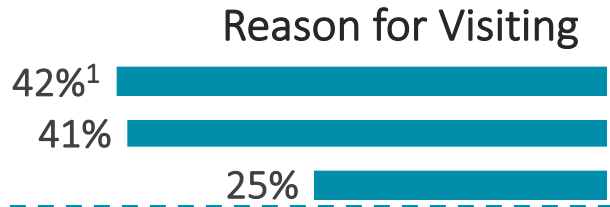
Visitor Activities



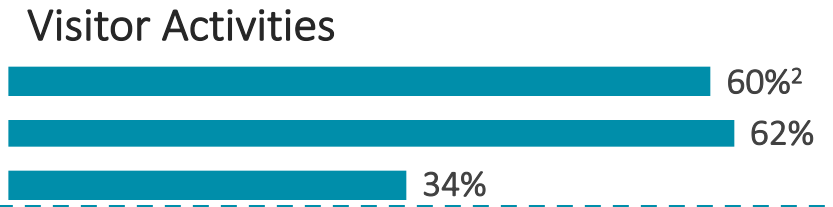
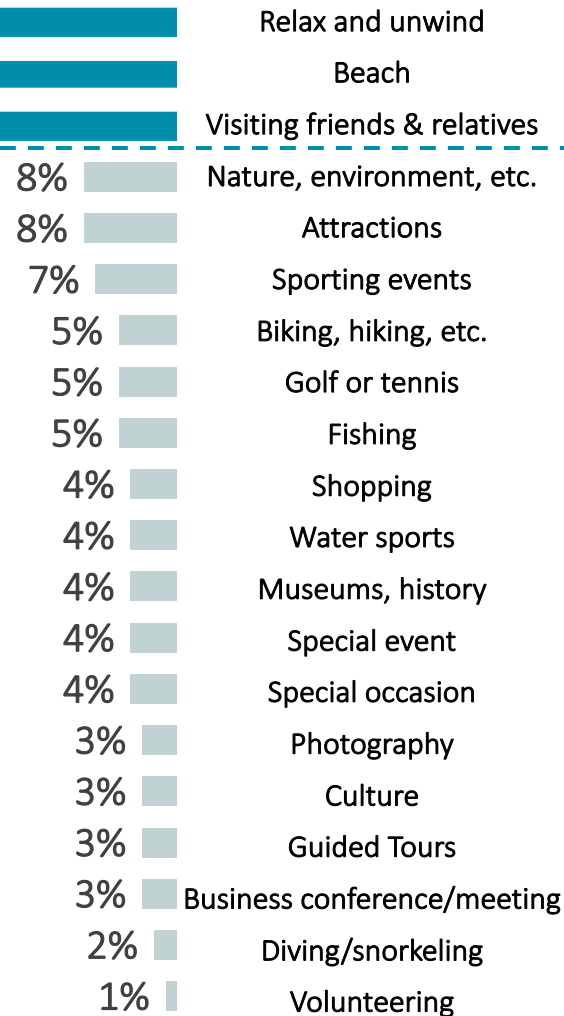
¹Multiple responses permitted.

Reason for Visiting vs. Visitor Activities

Key Reasons for Visiting

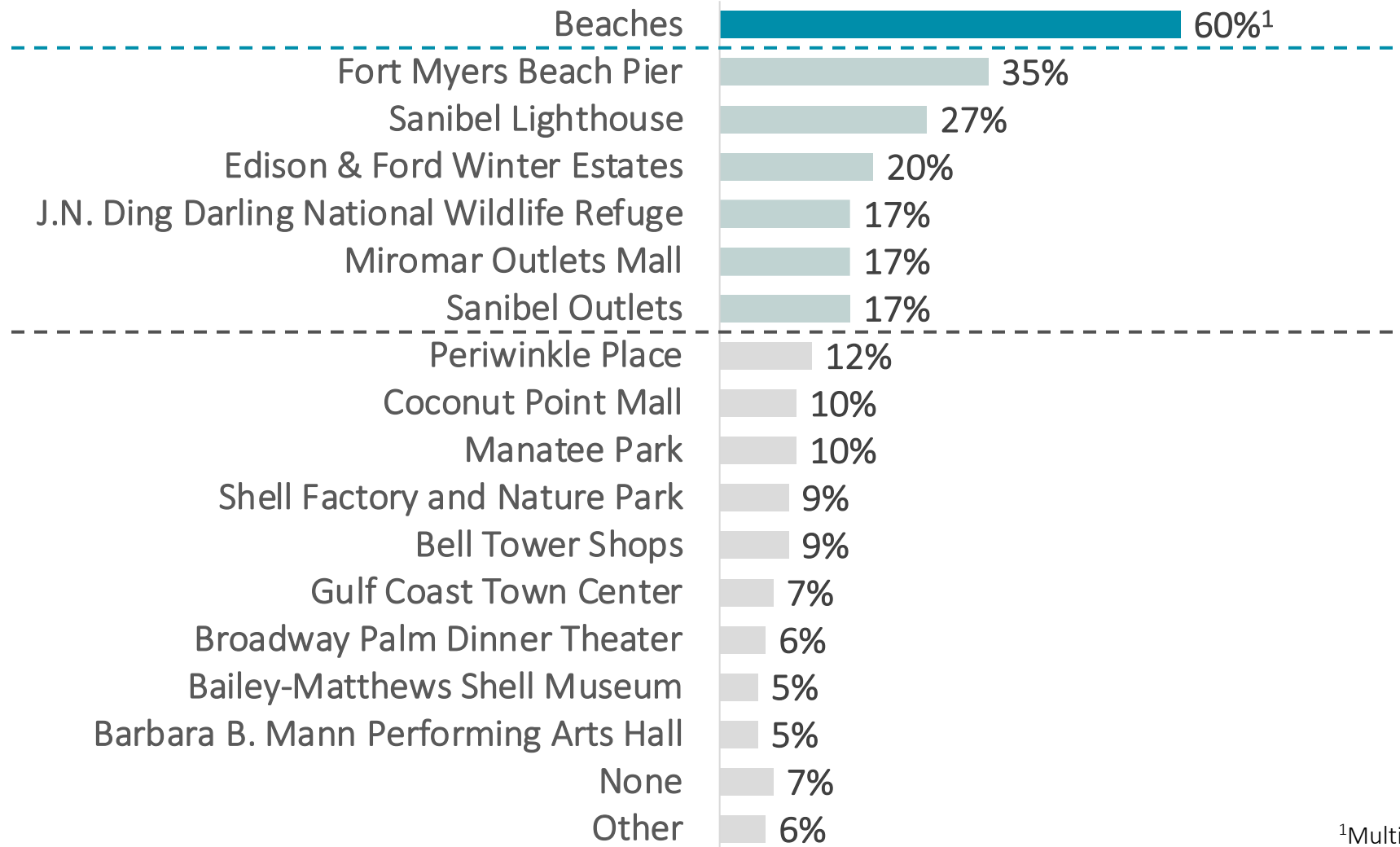


Trip Enhancements



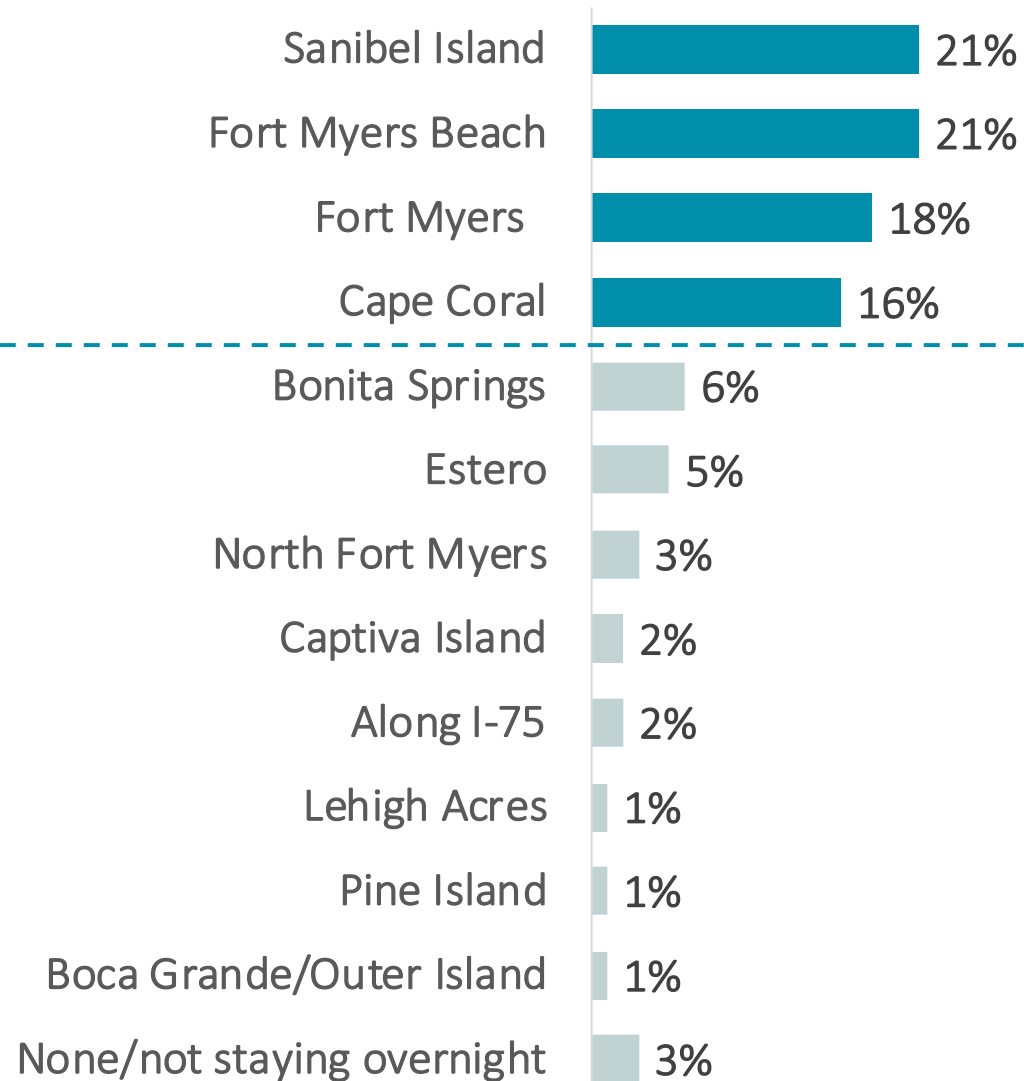
¹Three responses permitted.
²Multiple responses permitted.

Attractions Visited



¹Multiple responses permitted.

Community Stayed

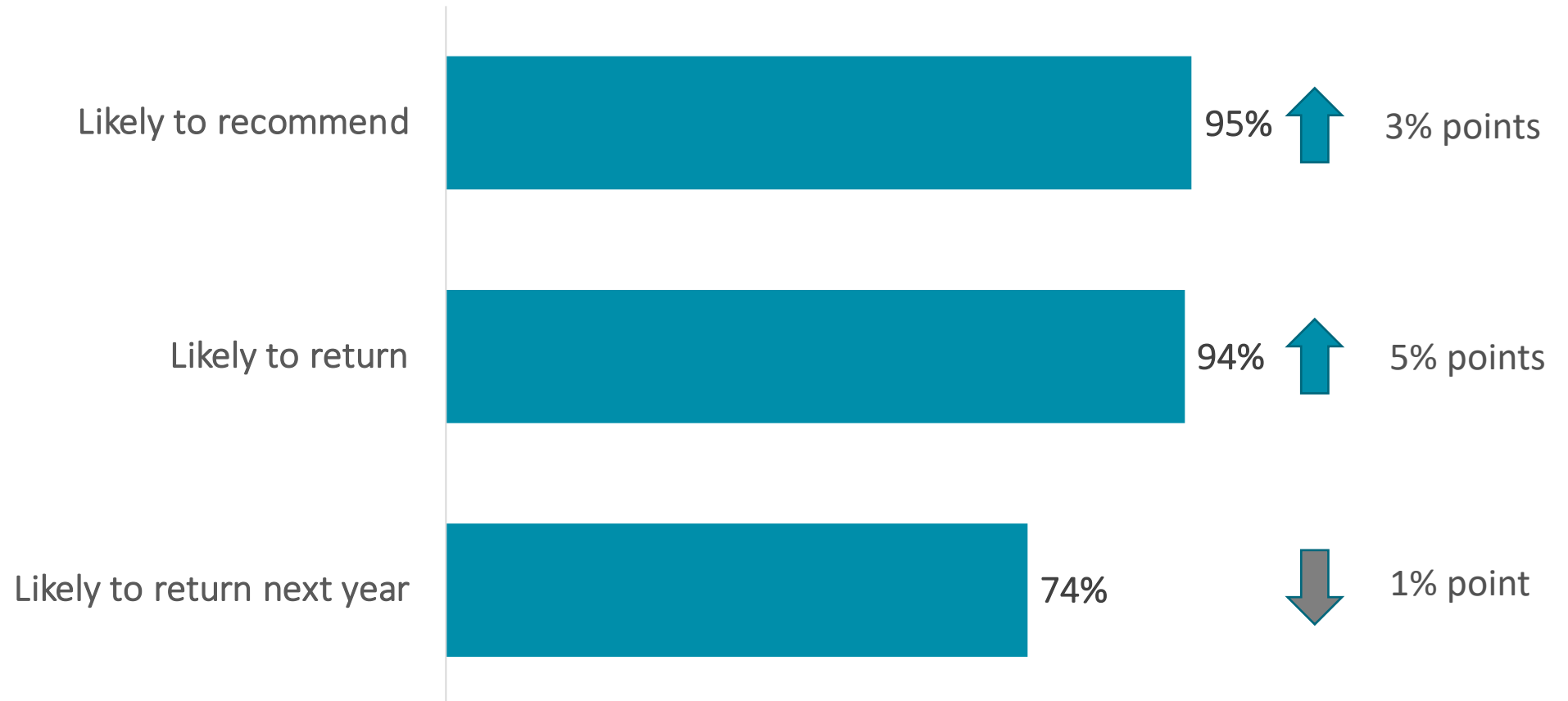


Travel Party Profile
Jan – Mar 2020

Visitor Journey: Post-Trip Evaluation



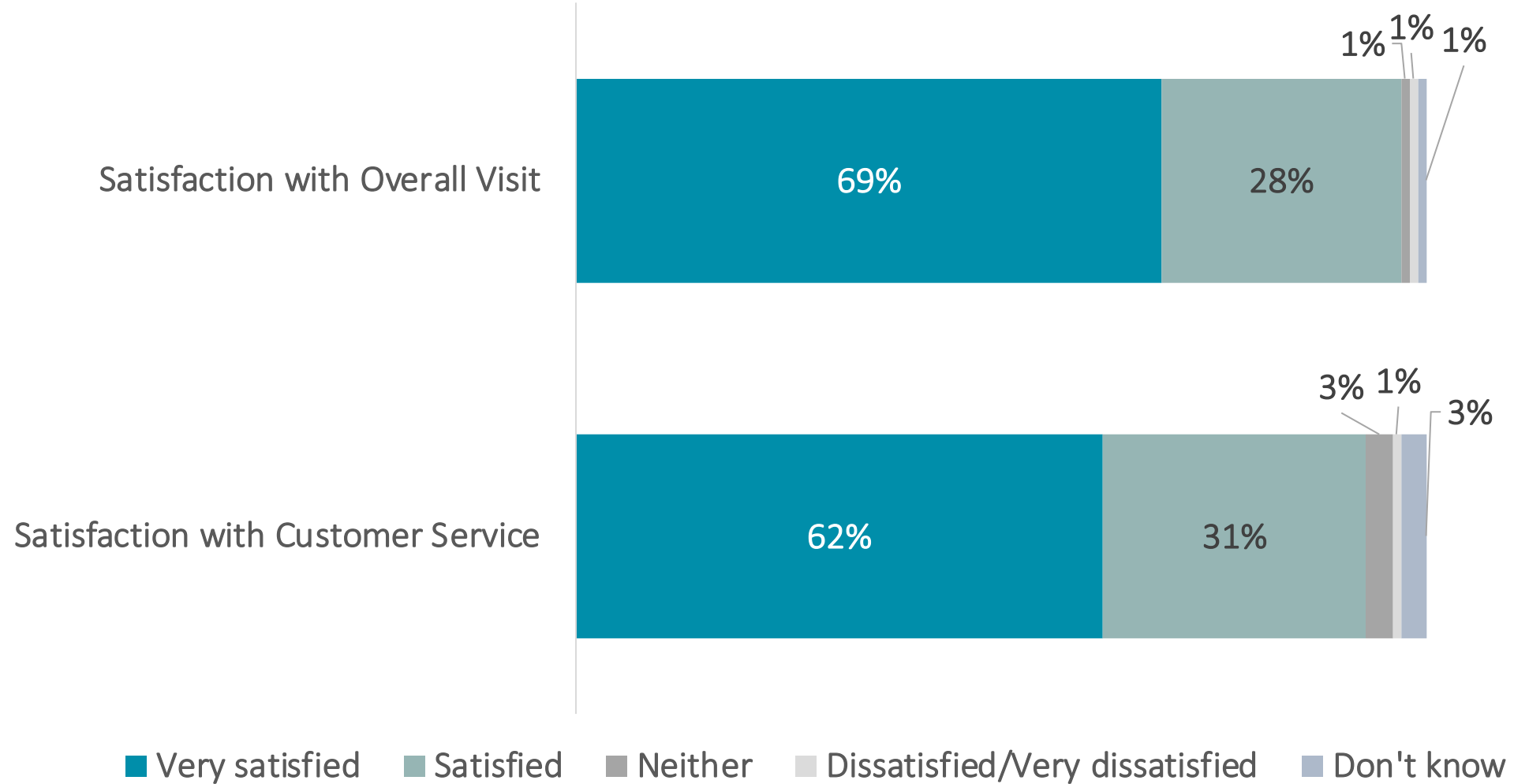
Satisfaction



Satisfaction Ratings

	1 st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2019	2020	2019	2020	2019	2020	2019	2020
Likely to Recommend	85%	90%	95%	96%	93%	95%	89%	93%
Likely to Return	76%	84%	94%	96%	92%	94%	88%	91%
Likely to Return Next Year	42%	42%	81%	81%	75%	75%	76%	61%

Satisfaction



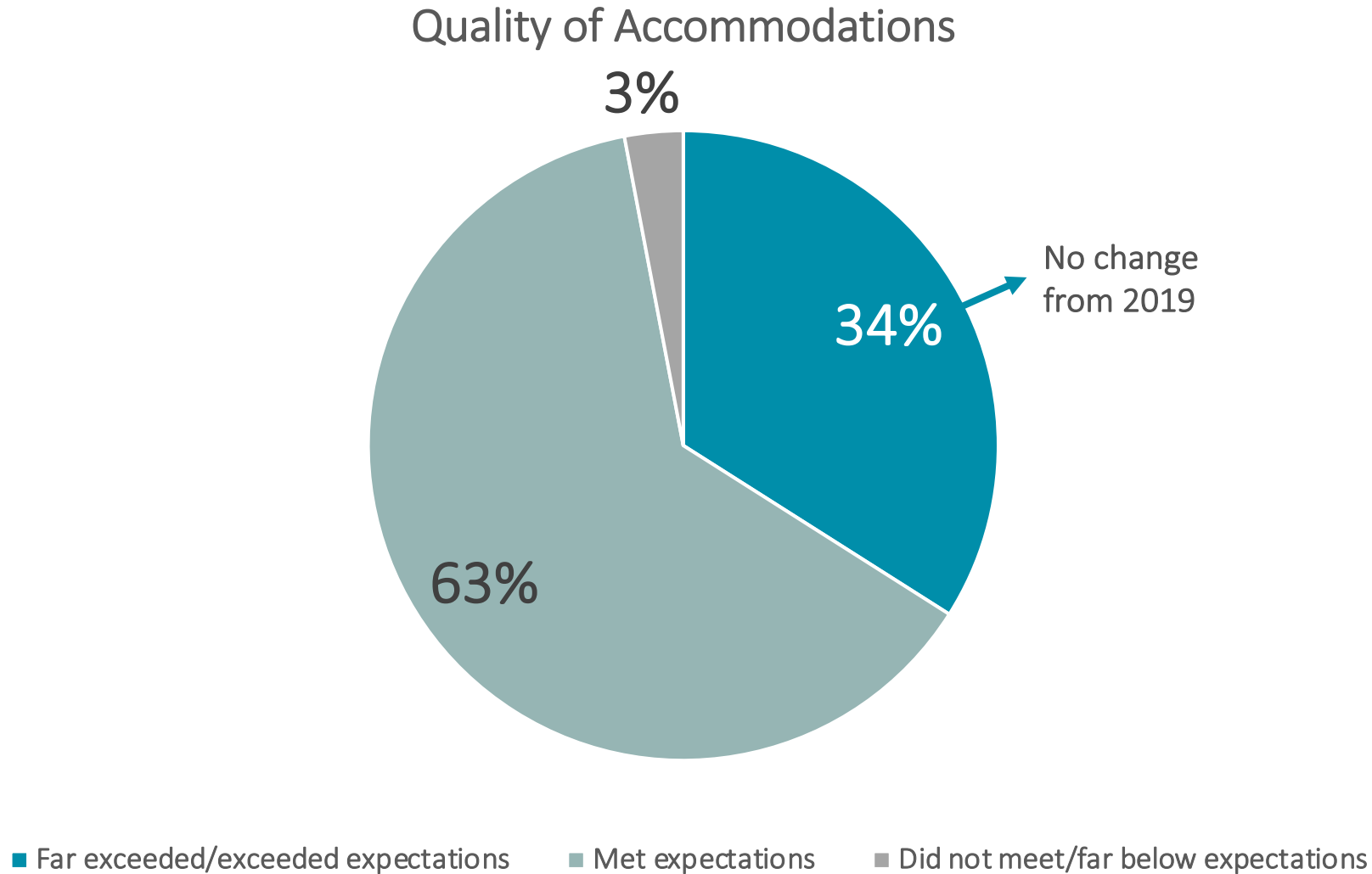
Satisfaction Ratings: Overall Visit

	1 st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2019	2020	2019	2020	2019	2020	2019	2020
Very Satisfied	48%	59%	69%	72%	66%	70%	70%	76%
Satisfied	47%	37%	28%	25%	31%	28%	27%	20%

Satisfaction Ratings: Customer Service

	1 st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2019	2020	2019	2020	2019	2020	2019	2020
Very Satisfied	44%	56%	61%	64%	57%	62%	58%	69%
Satisfied	46%	36%	32%	29%	36%	31%	31%	23%

Satisfaction Ratings: Quality of Accommodations



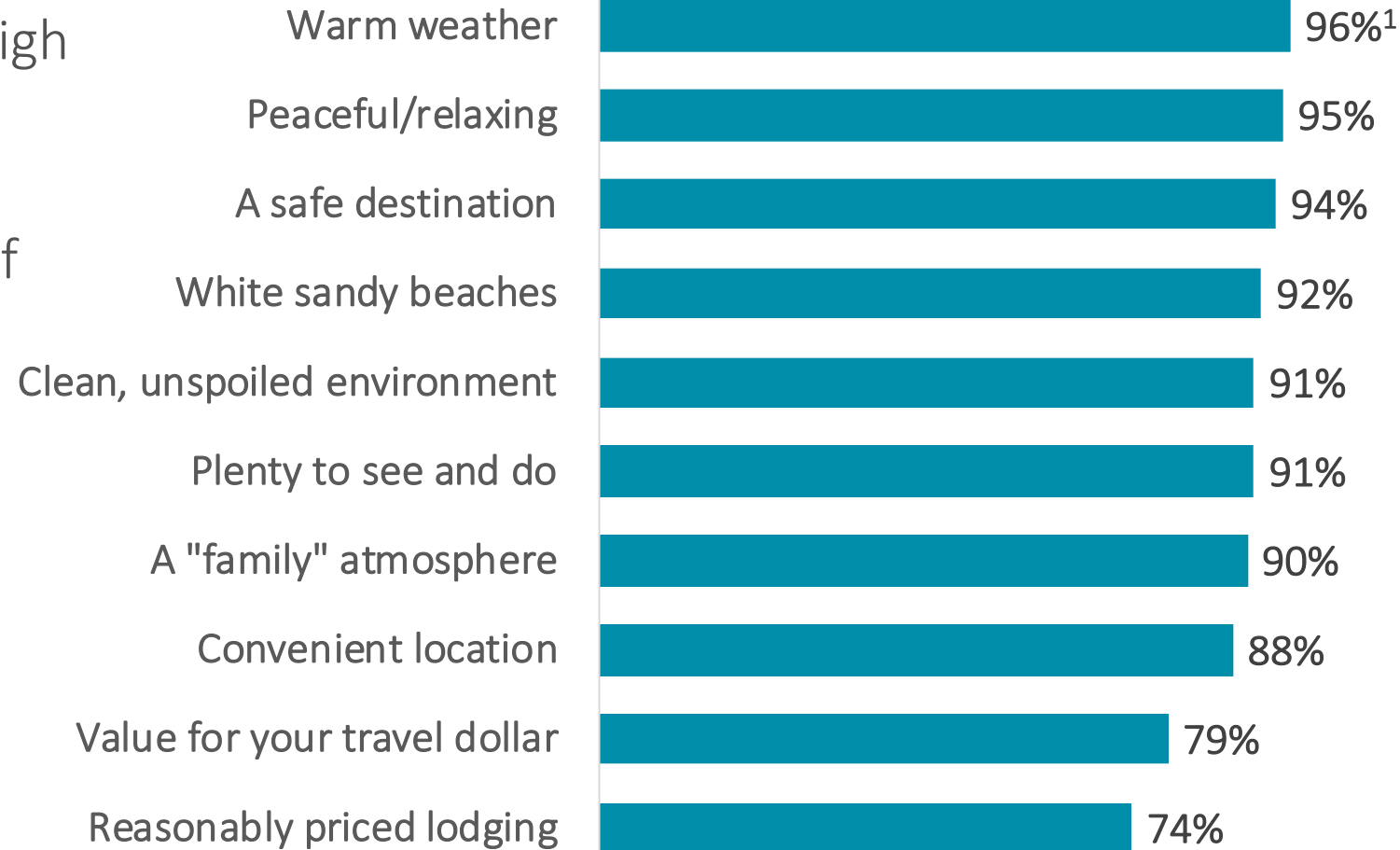
Satisfaction Ratings: Quality of Accommodations

	1 st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2019	2020	2019	2020	2019	2020	2019	2020
Exceeded Expectations	34%	39%	35%	33%	34%	33%	27%	36%
Met Expectations	64%	57%	62%	63%	63%	63%	62%	59%
Did Not Meet Expectations	3%	4%	3%	3%	3%	4%	12%	6%

Attribute Ratings

Over **95%** of visitors gave high experience ratings for warm weather, peace, and a safe destination in The Beaches of Fort Myers & Sanibel.

As the next slide shows, The Beaches of Fort Myers and Sanibel score high on all attributes that are key influencers on visitors' decision making



¹Top 2 box scores. Attributes rated on a scale from 1 to 5 where 1 is Poor and 5 is Excellent.

Vacation Attribute Influence vs. Ratings

Vacation Influencers¹

93%

87%

83%

81%

81%

78%

76%

69%

67%

63%

Warm weather

Peaceful/relaxing

A safe destination

White sandy beaches

Clean, unspoiled environment

Convenient location

Plenty to see and do

Value for your travel dollar

A "family" atmosphere

Reasonably priced lodging

Fort Myers/Sanibel Ratings²

96%

95%

94%

92%

91%

88%

91%

79%

90%

74%

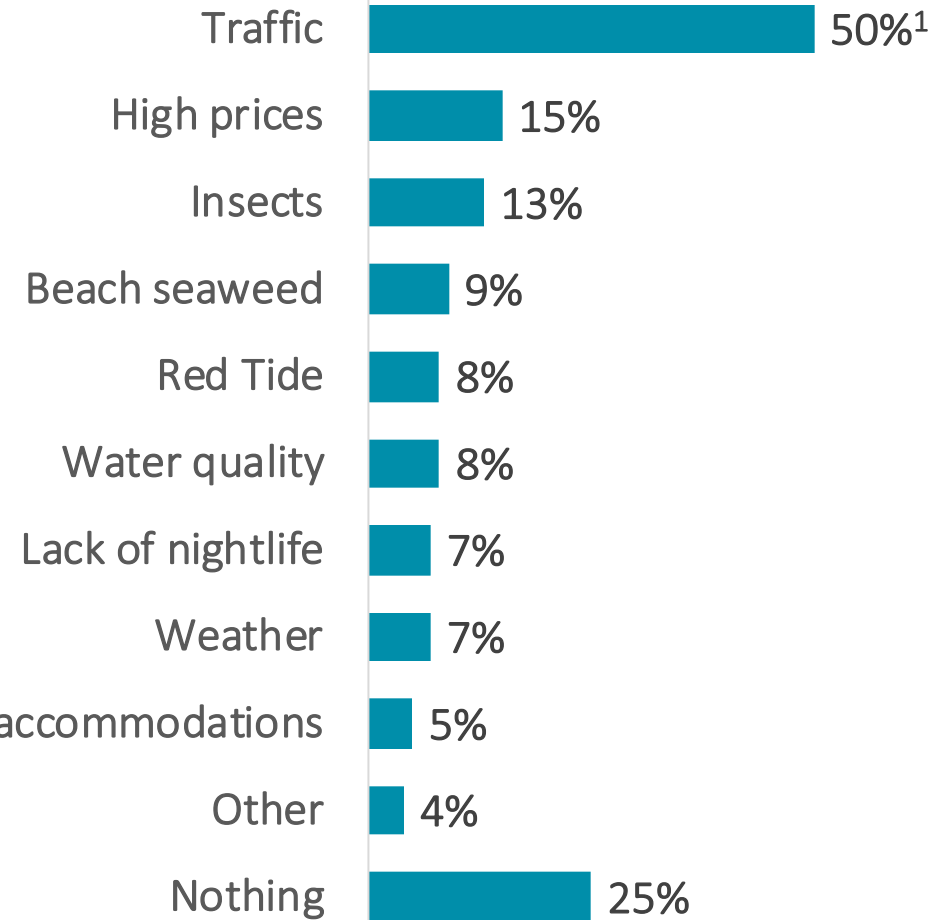
¹Top 2 box scores. Attributes rated on a scale from 1 to 5 where 1 is Not at All Influential and 5 is Definitely Influential.

²Top 2 box scores. Attributes rated on a scale from 1 to 5 where 1 is Poor and 5 is Excellent.

Visitor Concerns

Half of visitors indicated traffic was a concern while visiting The Beaches of Fort Myers & Sanibel.

Water quality, which was a major issue last year, was not mentioned as frequently.

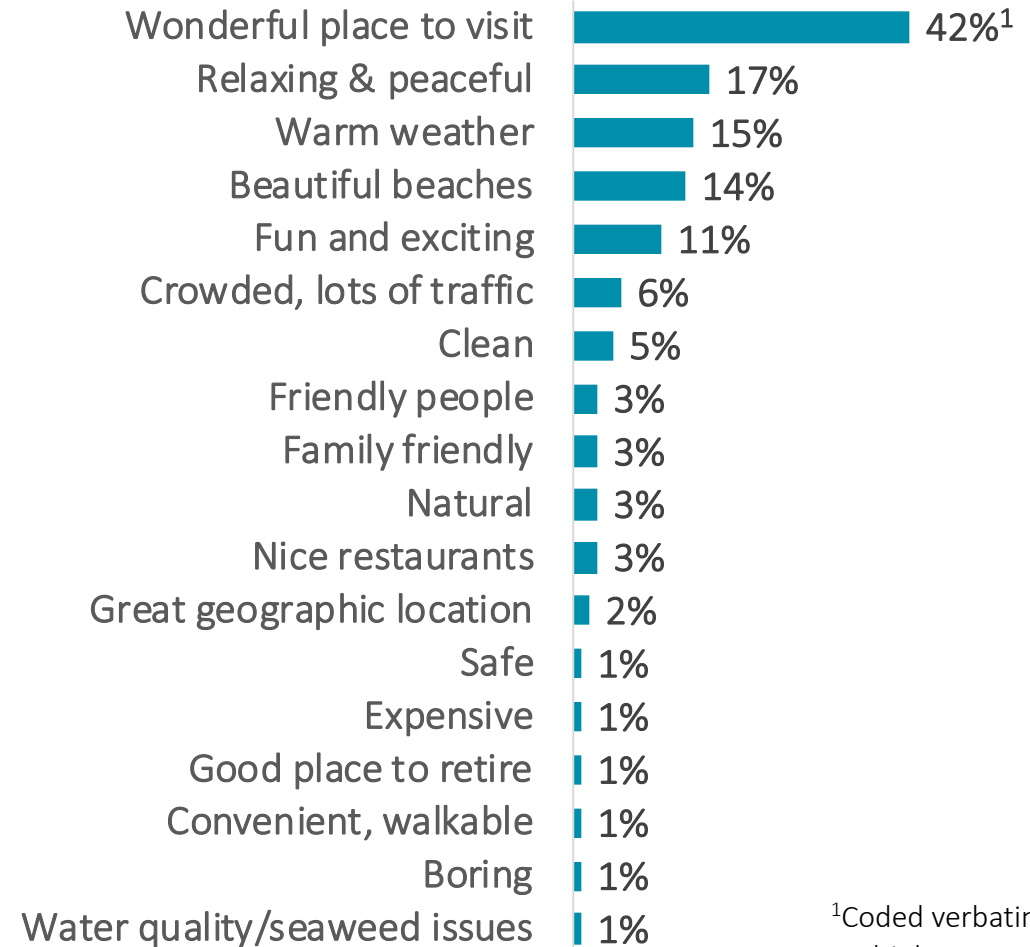


¹Multiple responses permitted.

Area Descriptions

Visitors describe The Beaches of Fort Myers & Sanibel as a **wonderful place to visit.**

Positive descriptors outnumber negative ones by a 121 to 9 ratio.



¹Coded verbatim responses; multiple responses permitted.

Area Descriptions



Wonderful Place to Visit

- “Beautiful, peaceful, worth every penny.”
- “Amazing place to relax and unwind as well as nice shops to shop, spas, and much more.”
- “Sanibel is absolutely beautiful and worth the trip.”
- “Come see it and have fun under the sun”



Relaxing & Peaceful

- “Relaxing to stroll the beaches searching for shells and enjoy great restaurants.”
- “Peaceful and unspoiled with a variety of activities for people of all ages. Relaxed vibe and kind people.”
- “A wonderful place to relax and unwind with family atmosphere away from maddening crowds.”
- “Quaint getaway, so peaceful and relaxing.”

Area Descriptions



Warm Weather

- “A peaceful, beautiful tropical location with stunning white beaches and bright blue skies.”
- “Love the weather, may retire here.”
- “Tropical paradise.”
- “Beautiful weather, beautiful beaches, we honeymooned here!”



Beautiful Beaches

- “Lovely white sand beaches and a relaxing atmosphere that revolves around the rhythms of nature and the beach.”
- “Beautiful white beaches, shell picking fun, great restaurants and the Royal Scoop ice cream.”
- “White sandy beaches are unreal.”
- “Love to watch the sunrise and sunset at the beach”

Occupancy Barometer: April – June Reservations

April – June Reservations	Apr – Jun 2019	Apr – Jun 2020
Up	19%	0%
Same	39%	3%
Down	38%	97%
Not Sure	5%	0%

Occupancy Barometer: July – September Reservations

July – Sept Reservations	July – Sept 2019	July – Sept 2020
Up	12%	1%
Same	44%	15%
Down	35%	68%
Not Sure	9%	16%

Year-Over-Year Comparisons



Economic Impact

Visitor & Lodging Statistics	Jan – Mar 2019	Jan – Mar 2020	% Change
Visitors	1,311,900	1,091,300	-16.8%
Room Nights	1,848,200	1,599,300	-13.5%
Direct Expenditures	\$1,251,828,600	\$1,082,785,200	-13.5%
Total Economic Impact	\$2,032,969,600	\$1,758,443,200	-13.5%
Occupancy	86.3%	78.2%	-9.4%
ADR	\$213.96	\$196.19	-8.3%
RevPAR	\$184.65	\$153.42	-16.9%

Jobs, Wages and Taxes Supported by Tourism

	Jan – Mar 2019	Jan – Mar 2020	% Change
Direct Jobs	16,851	14,551	-13.6%
Total Jobs	23,423	20,350	-13.1%
Direct Wages	\$391,224,900	\$326,417,300	-16.6%
Total Wages	\$639,734,400	\$545,326,600	-14.8%
Direct Local Taxes	\$41,435,500	\$33,024,900	-20.3%
Total Local Taxes	\$71,763,800	\$59,435,400	-17.2%
Direct State Taxes	\$89,005,000	\$76,986,000	-13.5%
Total State Taxes	\$133,769,400	\$115,178,000	-13.9%

Visitor Type

Visitor Type	Jan – Mar 2019	Jan – Mar 2020
Visitors in Paid Accommodations	60%	65%
Visitors in Non-Paid Accommodations	35%	32%
Day Trippers	5%	3%

Pre-Visit

Planned trip in advance	Jan – Mar 2019	Jan – Mar 2020
1 week or less	7%	5%
2-4 weeks	7%	8%
1-2 months	17%	21%
3-6 months	27%	30%
6 months or more	35%	32%
Not sure	4%	3%

Considered Other Destinations	Jan – Mar 2019	Jan – Mar 2020
Yes	21%	16%
No	79%	84%

Pre-Visit

Trip Planning Websites ¹	Jan – Mar 2019	Jan – Mar 2020
Airline websites	24%	28%
Search engines	20%	20%
Hotel websites	15%	19%
Trip Advisor	18%	17%
Airbnb, VRBO, HomeAway, or similar website	11%	16%
Booking websites	14%	15%
Vacation rental websites	10%	14%
Facebook	6%	9%
Visit Florida	4%	9%
Travel reviews, blogs, stories, etc.	3%	7%
www.FortMyers-Sanibel.com	5%	9%
Beaches of Fort Myers & Sanibel Social Media	3%	6%
Instagram	2%	5%
TV or radio streaming	2%	5%
None/Don't visit websites	31%	19%
Other	8%	5%

¹Multiple responses permitted.

Pre-Visit

Information Requests ¹	Jan – Mar 2019	Jan – Mar 2020
Call hotel/motel/condo	8%	18%
Visitor guide	2%	11%
Fort Myers-Sanibel E-newsletter	1%	8%
Call VCB	2%	7%
Call local Chamber of Commerce	2%	6%
None/Did not request info	79%	67%
Other	8%	4%

¹Multiple responses permitted.

Pre-Visit

Recall of Lee County Promotions	Jan – Mar 2019	Jan – Mar 2020
Yes	35%	40%
No	50%	48%
Can't recall	15%	12%

Characteristics influencing decision to visit Lee County (top 2 boxes)	Jan – Mar 2019	Jan – Mar 2020
Warm weather	92%	93%
Peaceful/relaxing	86%	87%
A safe destination	80%	83%
White sandy beaches	80%	81%
Clean, unspoiled environment	75%	81%
Convenient location	76%	78%
Plenty to see and do	73%	76%
Value for your travel dollar	61%	69%
A "family" atmosphere	64%	67%
Reasonably priced lodging	51%	63%

Pre-Visit

Transportation	Jan – Mar 2019	Jan – Mar 2020
Fly	64%	70%
Drive a personal vehicle	33%	25%
Drive a rental vehicle	2%	2%
Drive a RV	2%	1%
Travel by bus	0.4%	1%
Other	1%	1%

Airport Used	Jan – Mar 2019	Jan – Mar 2020
Southwest Florida International	80%	80%
Punta Gorda	9%	7%
Miami International	2%	4%
Ft. Lauderdale international	2%	3%
Tampa International	2%	3%
Orlando International	3%	2%
Other	1%	1%

Travel Party Profile

Visitor Origin	Jan – Mar 2019	Jan – Mar 2020
Florida	4%	4%
Southeast	7%	12%
Northeast	27%	24%
Midwest	47%	47%
West	3%	4%
Canada	8%	5%
United Kingdom	1%	1%
Germany	1%	1%
Other Europe	2%	1%
Other international	0%	1%

Visitor Origin	Jan – Mar 2019	Jan – Mar 2020
Minneapolis	9%	7%
New York City	6%	5%
Boston	5%	4%
Cincinnati	3%	4%
Detroit	5%	4%
Indianapolis	3%	3%
Chicago	3%	3%

Travel Party Profile

Travel Parties	Jan – Mar 2019	Jan – Mar 2020
Mean travel party size	2.9	3.1 ¹
Travel with children under age 18	23%	22%

Travel Party Composition	Jan – Mar 2019	Jan – Mar 2020
Couple	49%	48%
Family	29%	27%
Single	9%	11%
Group of couples/friends	11%	10%
In a tour group	1%	2%
With business associates	1%	2%

¹Source: Visitor Tracking Survey, includes all types of visitors

Travel Party Profile

Marital Status	Jan – Mar 2019	Jan – Mar 2020
Married	75%	74%
Single	20%	21%
Other	5%	5%

Age	Jan – Mar 2019	Jan – Mar 2020
Average age	59	53

Household Income	Jan – Mar 2019	Jan – Mar 2020
Median Income	\$100,109	\$118,300

Trip Experience

Length of Stay	Jan – Mar 2019	Jan – Mar 2020
Average nights in The Beaches of Fort Myers & Sanibel	13.4	10.5

First time/Repeat Visitors	Jan – Mar 2019	Jan – Mar 2020
First-time	23%	20%
Repeat	77%	80%

Trip Experience

Activities ¹	Jan – Mar 2019	Jan – Mar 2020
Beaches	75%	62%
Relax & unwind	69%	60%
Dining	62%	56%
Shopping	48%	35%
Visiting friends/relatives	39%	34%
Nature, environment, bird watching	24%	25%
Attractions	19%	20%
Biking, hiking etc.	21%	17%
Bars, nightlife	18%	17%
Water sports	23%	16%
Golf or tennis	19%	13%
Photography	12%	12%
Sporting event	12%	11%
Fishing	14%	10%
Culture	24%	10%
Museum, history, etc.	10%	10%
Guided tours	7%	8%
Special event	6%	7%
Special occasion	2%	4%
Spas	2%	4%
Diving/snorkeling	2%	3%
Business conference or meeting	1%	3%
Volunteering	0%	2%
Other	4%	4%

¹Multiple responses permitted.

Trip Experience

Attractions ¹	Jan – Mar 2019	Jan – Mar 2020
Beaches	75%	60%
Fort Myers Beach Pier	39%	35%
Sanibel Lighthouse	26%	27%
Edison & Ford Winter Estates	24%	20%
J.N. Ding Darling National Wildlife Refuge	16%	17%
Miramar Outlets Mall	20%	17%
Sanibel Outlets	19%	17%
Periwinkle Place	10%	12%
Coconut Point Mall	9%	10%
Manatee Park	8%	10%
Shell Factory and Nature Park	8%	9%
Bell Tower Shops	10%	9%
Gulf Coast Town Center	7%	7%
Broadway Palm Dinner Theater	3%	6%
Bailey-Matthews Shell Museum	3%	5%
Barbara B. Mann Performing Arts Hall	4%	5%
None	12%	7%
Other	8%	6%

¹Multiple responses permitted.

Trip Experience

Area stayed	Jan – Mar 2019	Jan – Mar 2020
Sanibel Island	16%	21%
Fort Myers Beach	19%	21%
Fort Myers	26%	18%
Cape Coral	14%	16%
Bonita Springs	7%	6%
Estero	1%	5%
North Fort Myers	3%	3%
Captiva Island	2%	2%
Along I-75	1%	2%
Lehigh Acres	2%	1%
Pine Island	1%	1%
Boca Grande/Outer Island	1%	1%
None/not staying overnight	5%	3%

Post-Trip Evaluation

Loyalty metrics	Jan – Mar 2019	Jan – Mar 2020
Likely to recommend	92%	95%
Likely to return	89%	94%
Likely to return next year	75%	74%

Satisfaction with Accommodations	Jan – Mar 2019	Jan – Mar 2020
Exceeded expectations	33%	34%
Met expectations	64%	63%
Did not meet expectations	3%	3%

Post-Trip Evaluation

Satisfaction with Visit	Jan – Mar 2019	Jan – Mar 2020
Very satisfied	64%	69%
Satisfied	32%	28%
Neither	2%	1%
Dissatisfied/Very dissatisfied	1%	1%
Don't know	1%	1%

Satisfaction with Customer Service	Jan – Mar 2019	Jan – Mar 2020
Very satisfied	54%	62%
Satisfied	34%	31%
Neither	4%	3%
Dissatisfied/Very dissatisfied	1%	1%
Don't know	6%	3%

Post-Trip Evaluation

Visitor Concerns ¹	Jan – Mar 2019	Jan – Mar 2020
Traffic	56%	50%
High prices	14%	15%
Insects	9%	13%
Beach seaweed	14%	9%
Red Tide	13%	8%
Water quality	7%	8%
Weather	3%	7%
Lack of nightlife	3%	7%
Quality of accommodations	3%	5%
Nothing	22%	25%
Other	2%	4%

¹Multiple responses permitted.

Methodology



Methodology

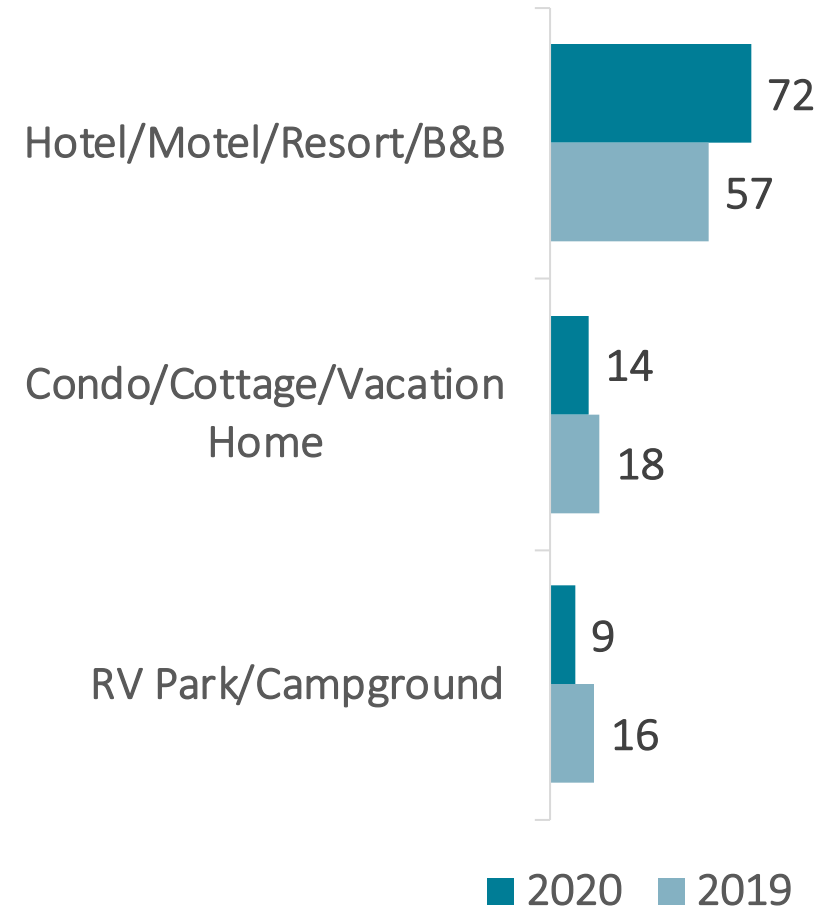
- Economic Impact of tourism in Lee County is derived from:
 - Visitor Tracking Study
 - Internet survey & in-person interviews in public areas, hotels, & at events around Lee County
 - Sample size: 1,014 completed interviews
 - Target individuals: Jan – Mar visitors to Lee County
 - Data Collection: January 2020 – March 2020
 - Occupancy Study
 - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc., and the STR Report
 - Sample Size – data from 8,406 hotel/rental/campground units (95 properties) reporting to DSG, and 9,869 hotel units reporting to STR (84 properties)
 - IMPLAN Economic Impact Modeling software
 - IMPLAN models the way tourism dollars are spent and re-spent in other sectors of the economy, generating waves of economic activity, called multiplier effects. The model uses national industry data and county-level economic data to generate a series of multipliers, which in turn estimate the total economic implications of economic activity.
 - Over 1,500 organizations use IMPLAN, including FEMA, EPA, Federal Reserve Bank, and Bureau of Land Management.
- Various government agencies and data sources
- TDT collections provided by the Lee County VCB
- Tourism database at Downs & St. Germain Research

Methodology

- **Occupancy Study**

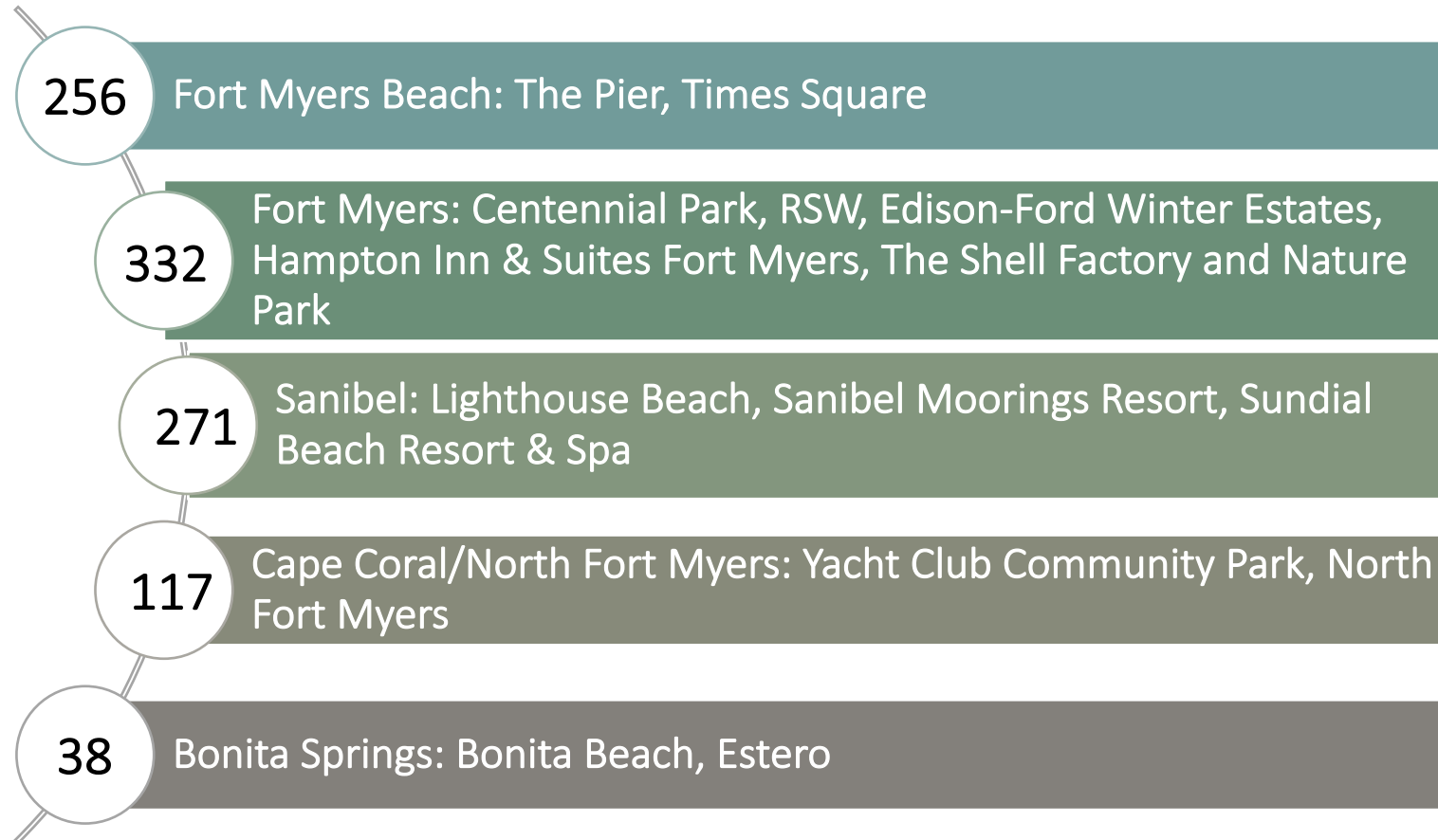
- Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc.
 - Sample Size – 95 completed interviews
 - Data Collection: April 2020 (for Jan – Mar 2020)
- Total Sample Size – data from 8,406 hotel/rental/campground units reporting to DSG and 9,869 hotel units reporting to STR (representing 84 properties)

Number of Interviews



Methodology

- 1,014 visitor interviews were completed in the following areas:



The Beaches of Fort Myers & Sanibel

Lee County VCB

Jan – Mar 2020

Visitor Tracking & Occupancy Study

Tamara Pigott, CDME

Executive Director

Phillip Downs, Ph.D.

Joseph St. Germain, Ph.D.

Rachael Anglin

Erin Dinkel

Downs & St. Germain Research

