The Beaches of Fort Myers & Sanibel

Lee County VCB

July – Sept 2019

Visitor Tracking, Occupancy & Economic Impact Study

THE BEACHES OF FORT MYERS AND SANIBEL

downs & st. germain RESEARCH

Introduction

Study Objectives: Map the Visitor Journey

Pre-Visit
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- Planning sources
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- Reasons for visiting
- Exposure to promotions
- Booking
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- Expenditures
- Economic impact
- Room nights generated
- Occupancy, ADR, RevPAR
- Jobs, wages and taxes supported by tourism

Executive Summary

Visitor Journey: Economic Impact on Destination

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

Tourism Snapshot: July – Sept 2019[1]

Visitor & Lodging Statistics	July – Sept 2018	July – Sept 2019	% Change
Visitors	981,760	1,102,500	+12.3%
Room Nights	907,150	975,200	+7.5%
Direct Expenditures[2]	$485,177,600	$548,970,200	+13.1%
Total Economic Impact[3]	$787,928,400	$891,527,600	+13.1%

[1] The levels of increases from 2018 to 2019 were relatively high in no small amount due to water quality issues last year, which depressed metrics. Plus, available inventory for visitors was up 5.1% in July to September 2019 compared to 2018.
[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.

Changes in Tourism Metrics: July – Sept 2017 - 2019[1]

Visitor & Lodging Statistics	July – Sept 2018 vs. 2017	July – Sept 2019 vs. 2018	July – Sept 2019 vs. 2017[2]
Visitors	-2.4%	+12.3%	+4.8%
Room Nights	-2.8%	+7.5%	+2.3%
Direct Expenditures[3]	-3.4%	+13.1%	+4.6%
Total Economic Impact[4]	-3.2%	+13.1%	+4.8%

[1] Percentage changes over the past two years were affected by water quality issues in 2018, hence significant decreases in 2018 followed by significant increases in 2019. The annual change across the two years is shown in the last column. These figures show a clearer picture of the last two years.

[2]Annual change from 2017 to 2019.

[3]Includes: accommodations, restaurants, entertainment, shopping, transportation, groceries, and "other" expenses.

[4] 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 2019[1]

Visitor & Lodging Statistics	CYTD 2018	CYTD 2019	% Change
Visitors	3,694,000	3,676,900	-0.5%
Room Nights	3,994,750	4,132,400	+3.4%
Direct Expenditures[2]	$2,432,610,100	$2,528,485,600	+3.9%
Total Economic Impact[3]	$3,950,558,800	$4,106,260,300	+3.9%

[1] Year-over-year differences due to: 1. more available inventory in 2019 and 2. differences in methodology impacting data collection, estimates for visitors staying in non-paid accommodations and day trippers.
[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.

July – Sept Lodging Statistics

45.6%	$122.54	$55.93
Occupancy	ADR	RevPAR
↑ 2.2%	↑ 5.1%	↑ 7.6%

Visitor Journey: Pre-Visit

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

Trip Planning

→ Nearly **6 in 10** visitors planned their trip to The Beaches of Fort Myers & Sanibel at least 3 months in advance

→ **2 in 10** visitors requested information from hotels, the VCB, etc., to plan their trip

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

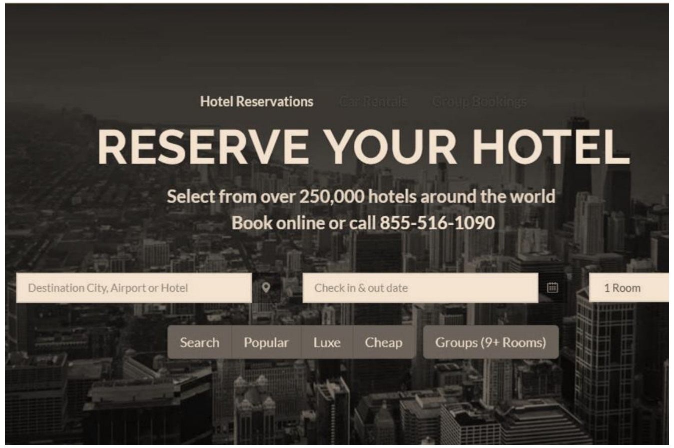
Trip Planning: Websites Used

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

→Top websites used to plan their trip include[1]:

34% Airline websites

20% Search engines



20% Hotel websites

[1]Multiple responses permitted.

Top Trip Influencers

→ Visitors were heavily influenced by the following when choosing where to vacation[1]:

86% Peaceful/relaxing

82% Safe destination

80% White sandy beaches

[1]Top 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 include[1]:

59% Vacation

52% Beach

51% Relax & unwind

24% Visit friends & relatives

[1]Three responses permitted.

Promotions

→ 31% of visitors recalled promotions in the past 6 months for The Beaches of Fort Myers & Sanibel

→ Top sources of recall include[1]:

40% Internet

34% Social media

25% TV

[1]Multiple responses permitted.

Booking

→Visitors used the following to book their trips:

45% Directly with hotel

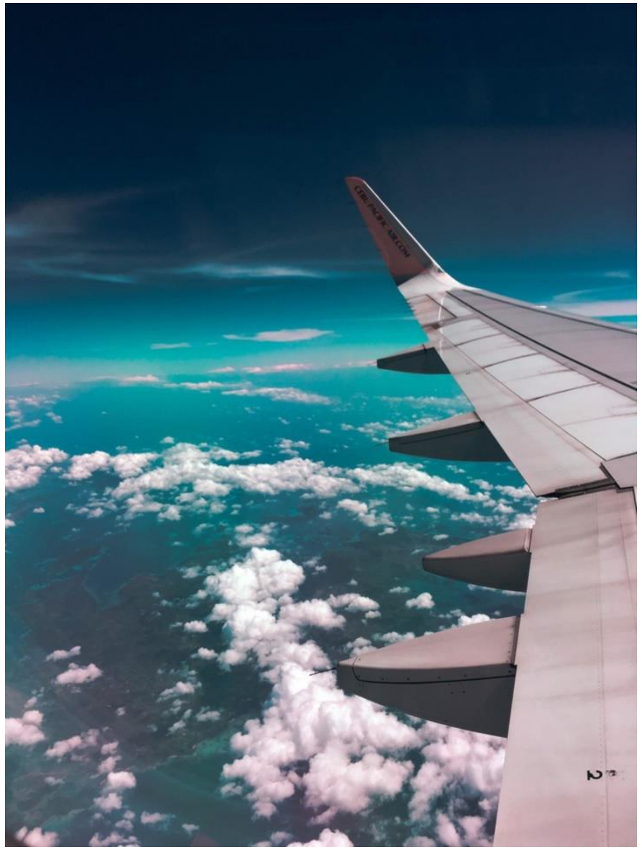
20% Other online travel agency

12% VRBO, HomeAway

10% Vacation rental company

7% Airbnb

Transportation



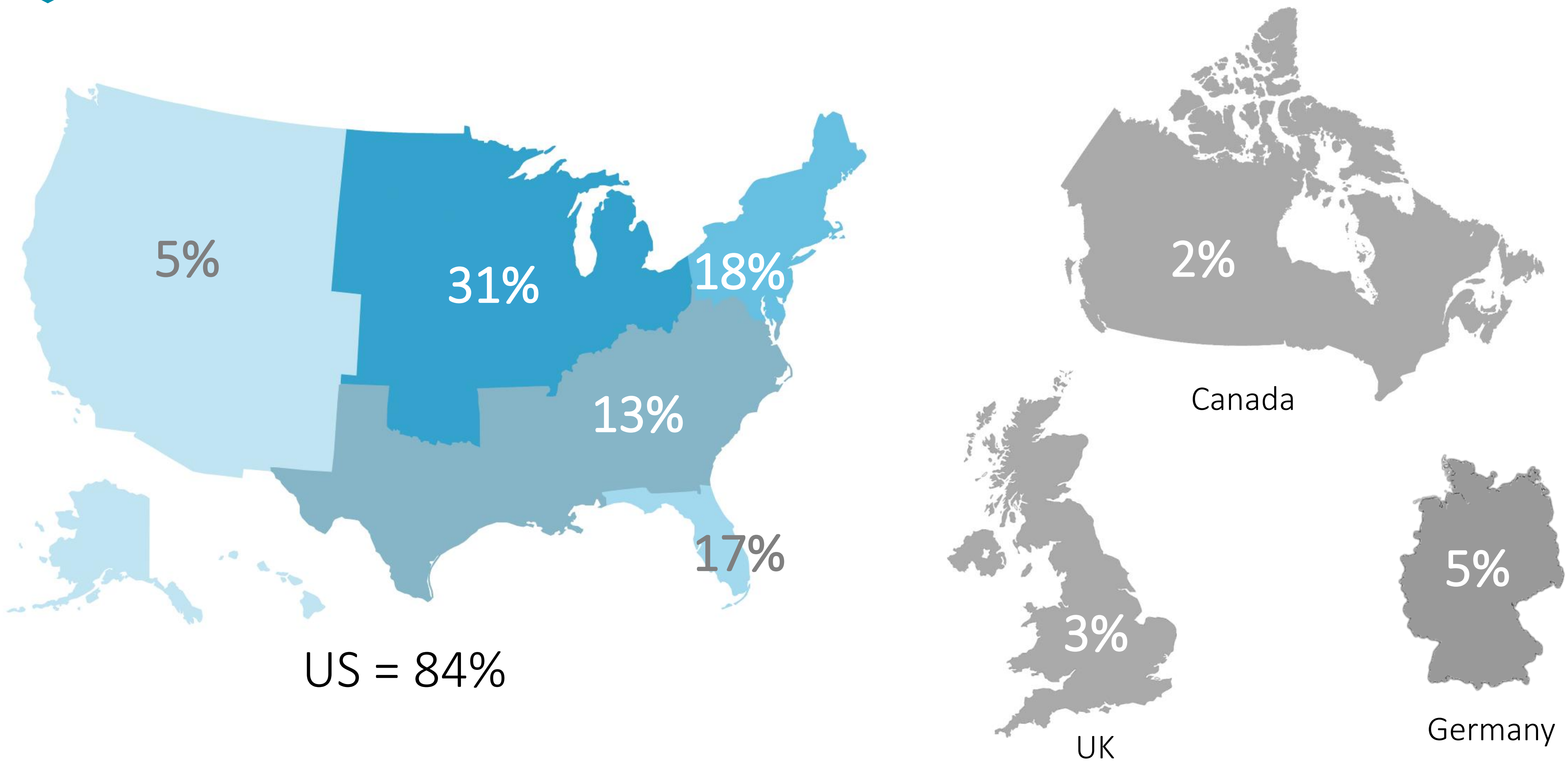
→ 60% of visitors flew to The Beaches of Fort Myers & Sanibel

→ 66% of visitors who flew to The Beaches of Fort Myers & Sanibel flew to RSW

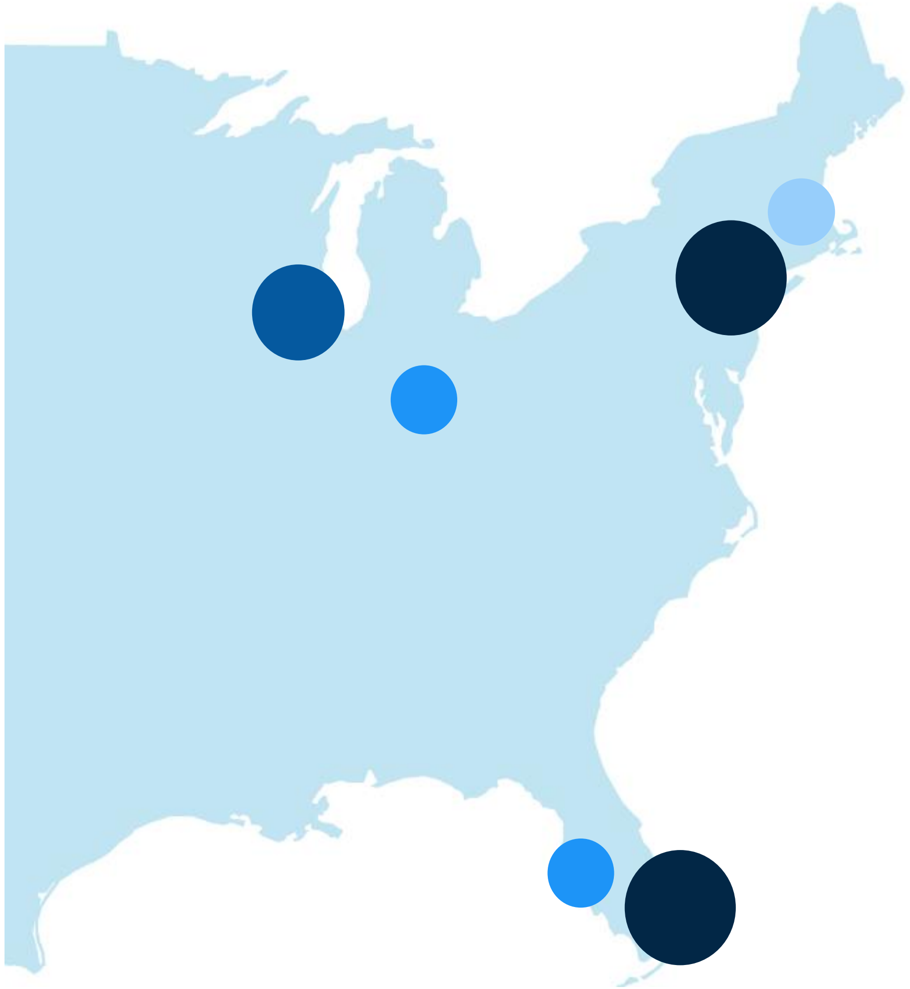
Visitor Journey: Travel Party Profile

Pre-Visit → **Travel Party Profile** → Trip Experience → Post-Trip Evaluation → Economic Impact on Destination

Origin



Top Origin Markets



- 6% New York
- 6% Miami-Ft. Lauderdale
- 5% Chicago
- 4% Cincinnati
- 4% Tampa-St. Pete-Clearwater
- 3% Boston

Travel Party Size and Composition

→Visitors traveled in a party composed of **3.5 people**[1]

→**36%** traveled with children under the age of 18

→**47%** traveled as a family, while **33%** of visitors traveled as a couple

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

Demographic Profile

July – Sept Visitors:

- → Average age of 50 years old
- → Median household income of $100,000
- → Married (72%)
- → College educated (59%)
- → Caucasian/white (83%)
- → Female (60%)

Visitor Journey: Trip Experience

Accommodations

33% Hotel/Motel/Resort/B&B

32% Condo/Vacation Rental

31% Non-paid Accommodations

3% Day trippers

1% RV Park/Campground

Length of Stay & Number of Times in Destination

→Visitors[1] spent 7.7 nights in The Beaches of Fort Myers & Sanibel

→30% were first time visitors

→29% have visited more than 10 times

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

Visitor Activities

→Top visitor activities include[1]:

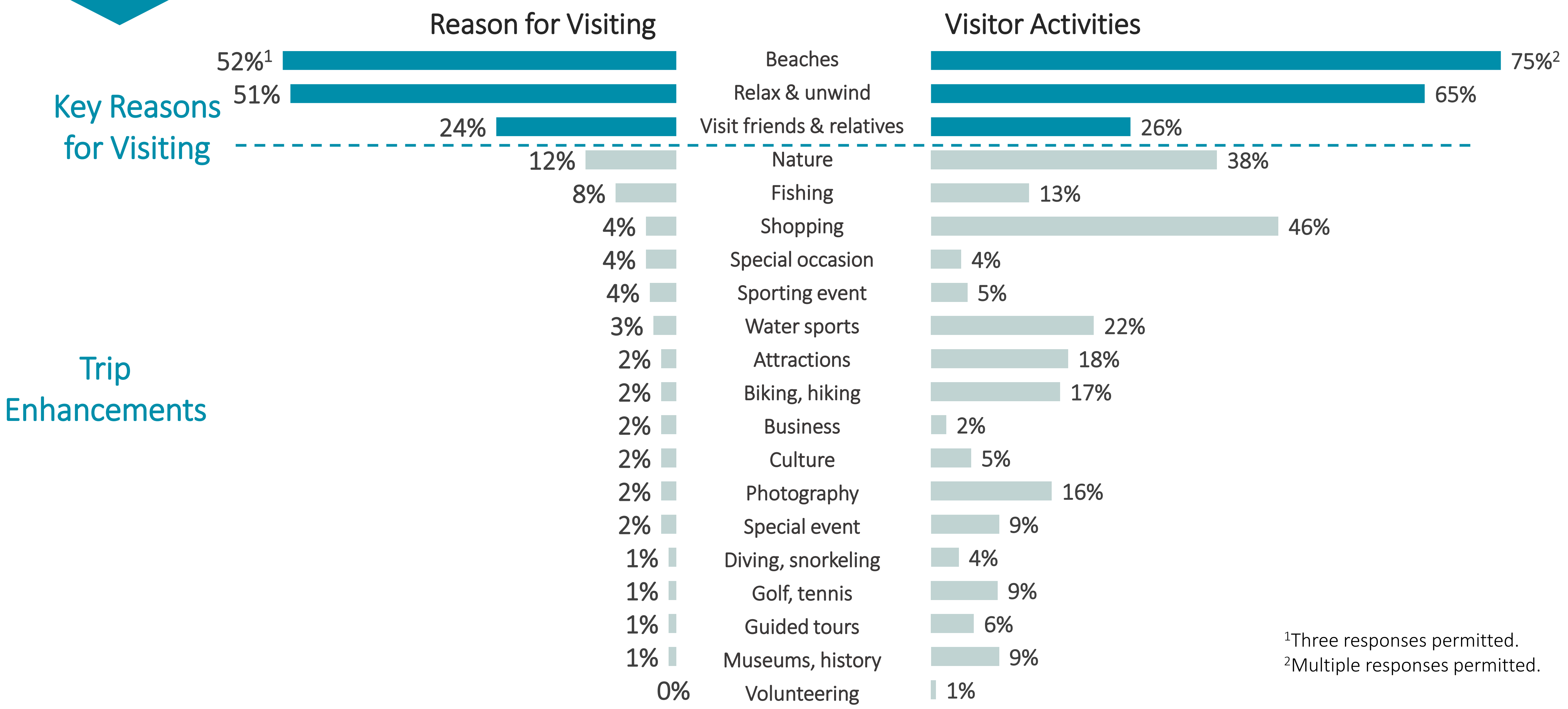
75% Beaches

65% Relax & unwind

65% Dining

[1]Multiple responses permitted.

Reason for Visiting vs. Visitor Activities



[1]Three responses permitted.
[2]Multiple responses permitted.

Top Attractions Visited[1]

75% Beaches

33% Fort Myers Beach Pier

32% Sanibel Lighthouse

24% Edison & Ford Winter Estates

20% Miromar Outlets

19% Sanibel Outlets

[1]Multiple responses permitted.

Top Communities Stayed

26% Sanibel Island

22% Fort Myers Beach

18% Cape Coral

17% Fort Myers

Visitor Journey: Post-Trip Evaluation

Pre-Visit → Travel Party Profile → Trip Experience → **Post-Trip Evaluation** → Economic Impact on Destination

Satisfaction

→ 91% of visitors are likely to recommend The Beaches of Fort Myers & Sanibel

→ 91% of visitors are likely to return

→ 60% of visitors are likely to return next year

→ 41% of visitors said paid accommodations "Far Exceeded" or "Exceeded" their expectations

Satisfaction

→ **95%** 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 attributes[1]:

98% Peaceful/relaxing

97% Safe destination

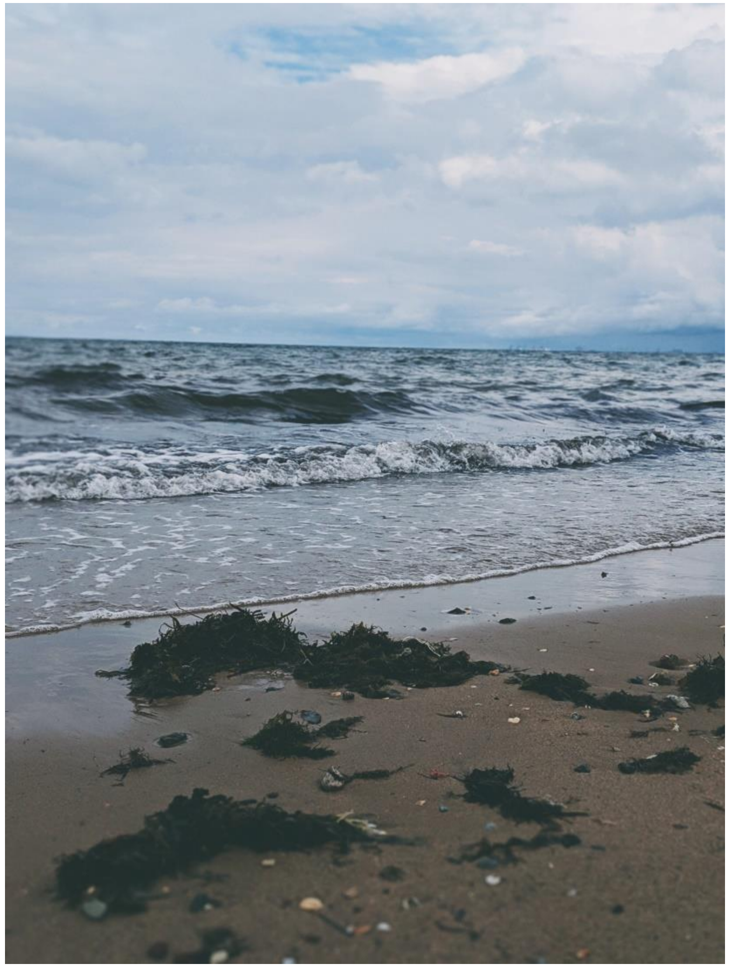
97% Family atmosphere

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

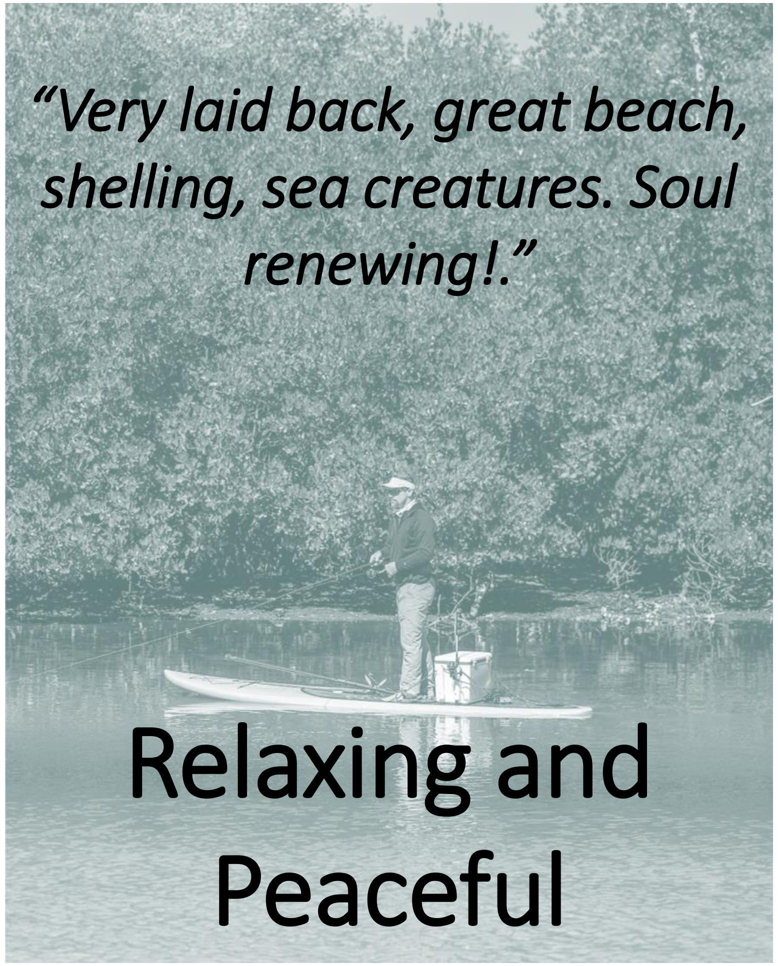
Visitor Concerns

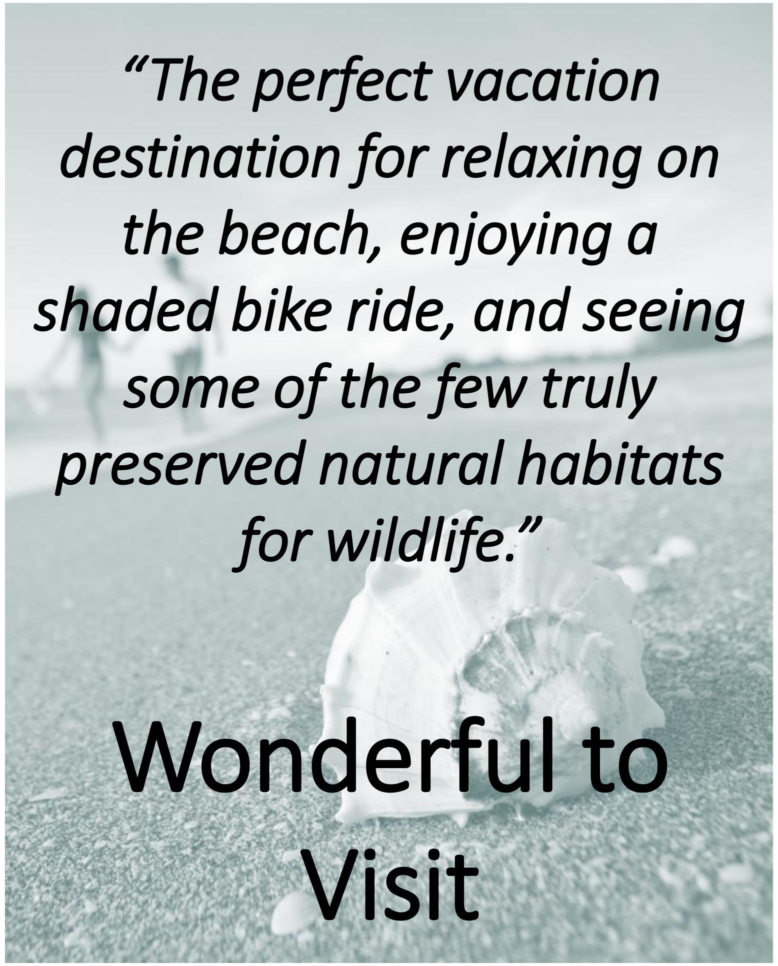
→2 in 10 visitors were concerned about Red Tide, beach seaweed and insects in The Beaches of Fort Myers & Sanibel

→33% of visitors had no concerns about the destination

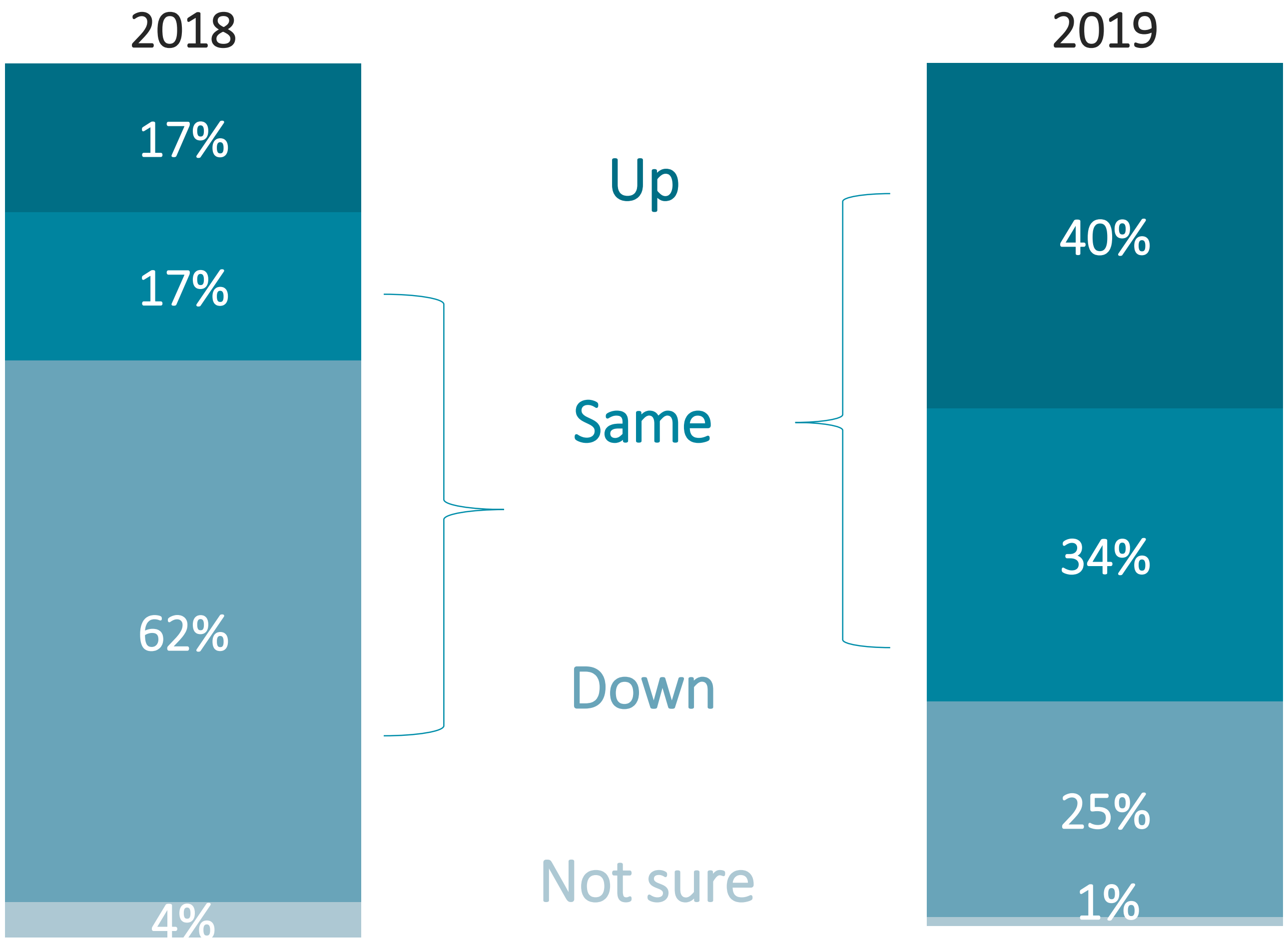


Area Descriptions

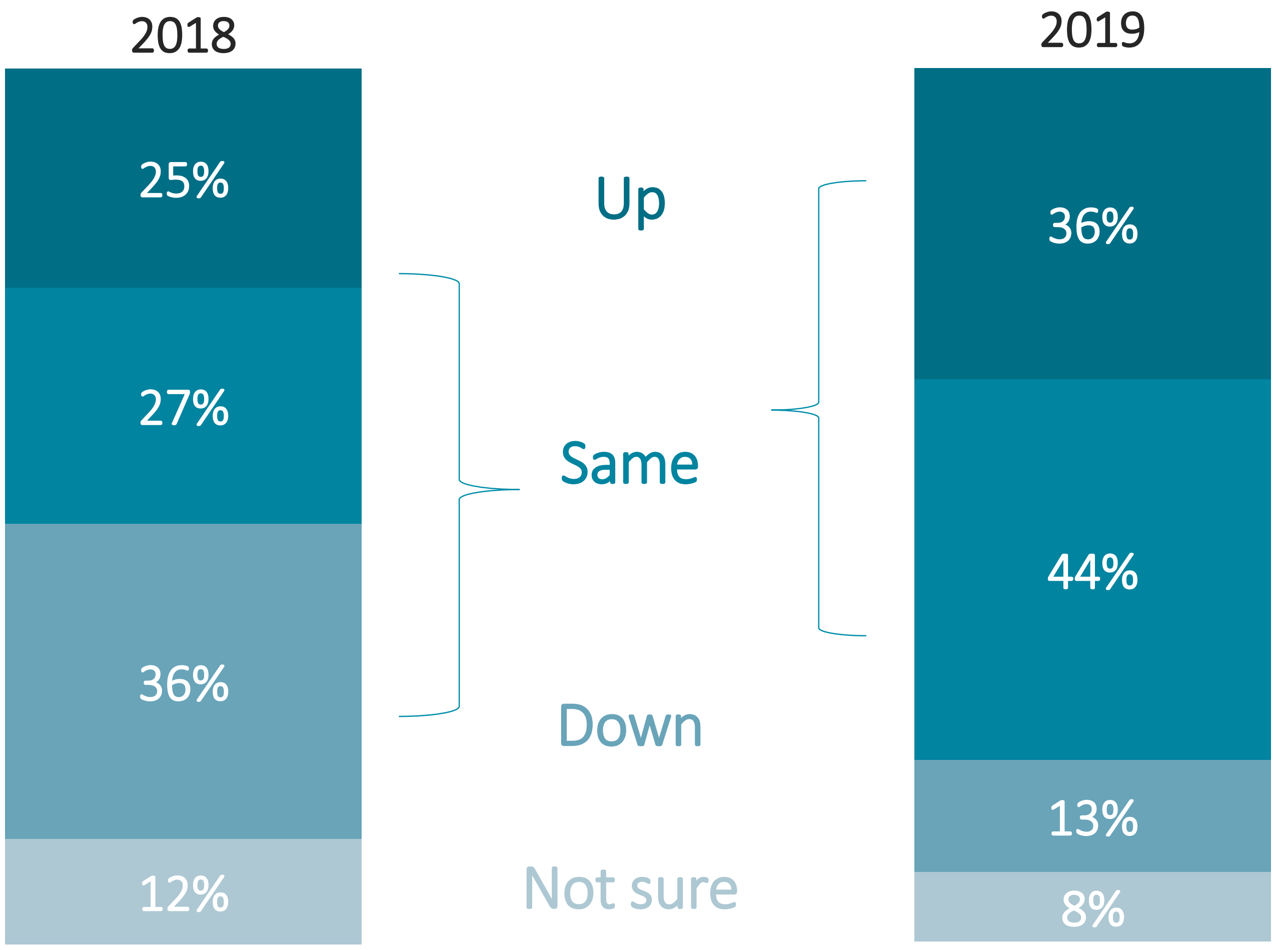




Occupancy Barometer: October – December Reservations



Occupancy Barometer: January – March Reservations



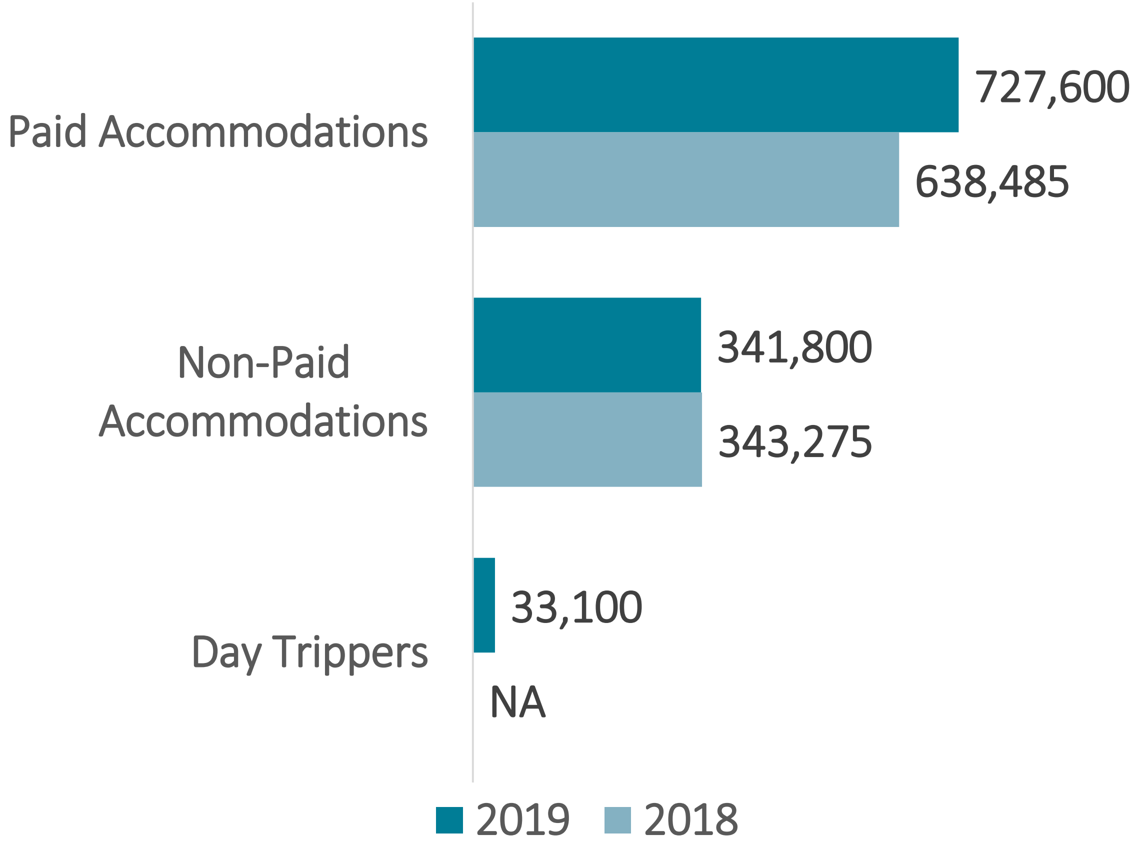
Detailed Findings

Visitor Journey: Economic Impact on Destination

Pre-Visit → Travel Party Profile → Trip Experience → Post-Trip Evaluation → **Economic Impact on Destination**

Number of Visitors

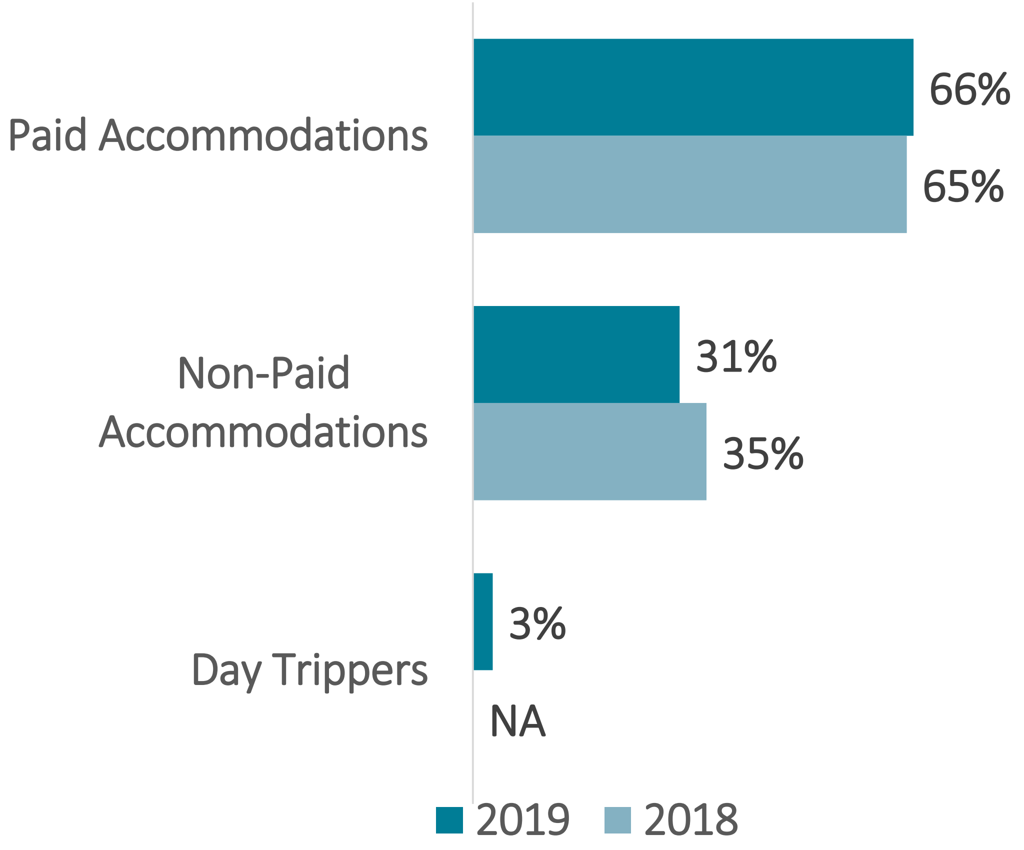
There were **1,102,500**[1] visitors to The Beaches of Fort Myers & Sanibel in July – Sept 2019 (+12.3% from 2018).



[1]Sources: Visitor Tracking Study & Occupancy Survey

Visitor Type

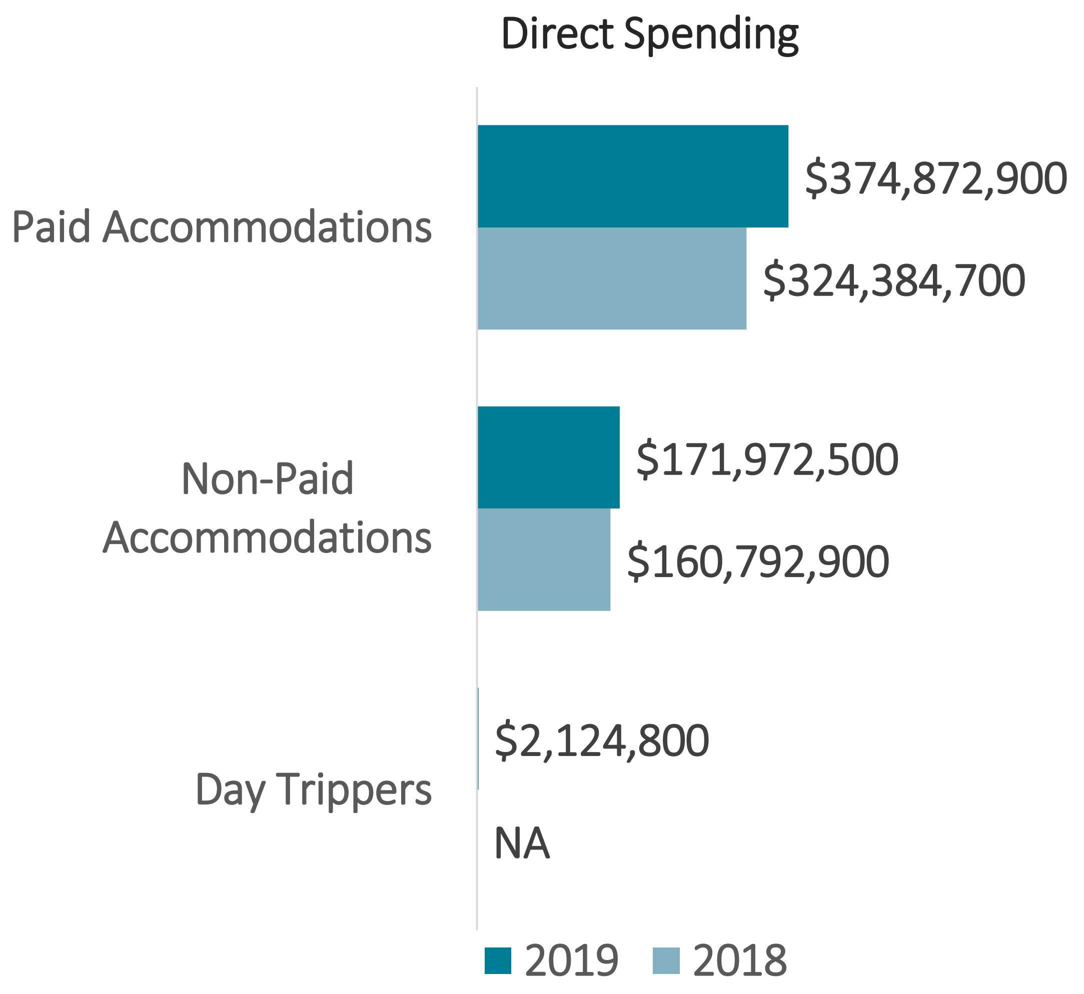
Visitors staying in paid accommodations accounted for **two-thirds** of all visitors.



[1]Sources: Visitor Tracking Study & Occupancy Survey

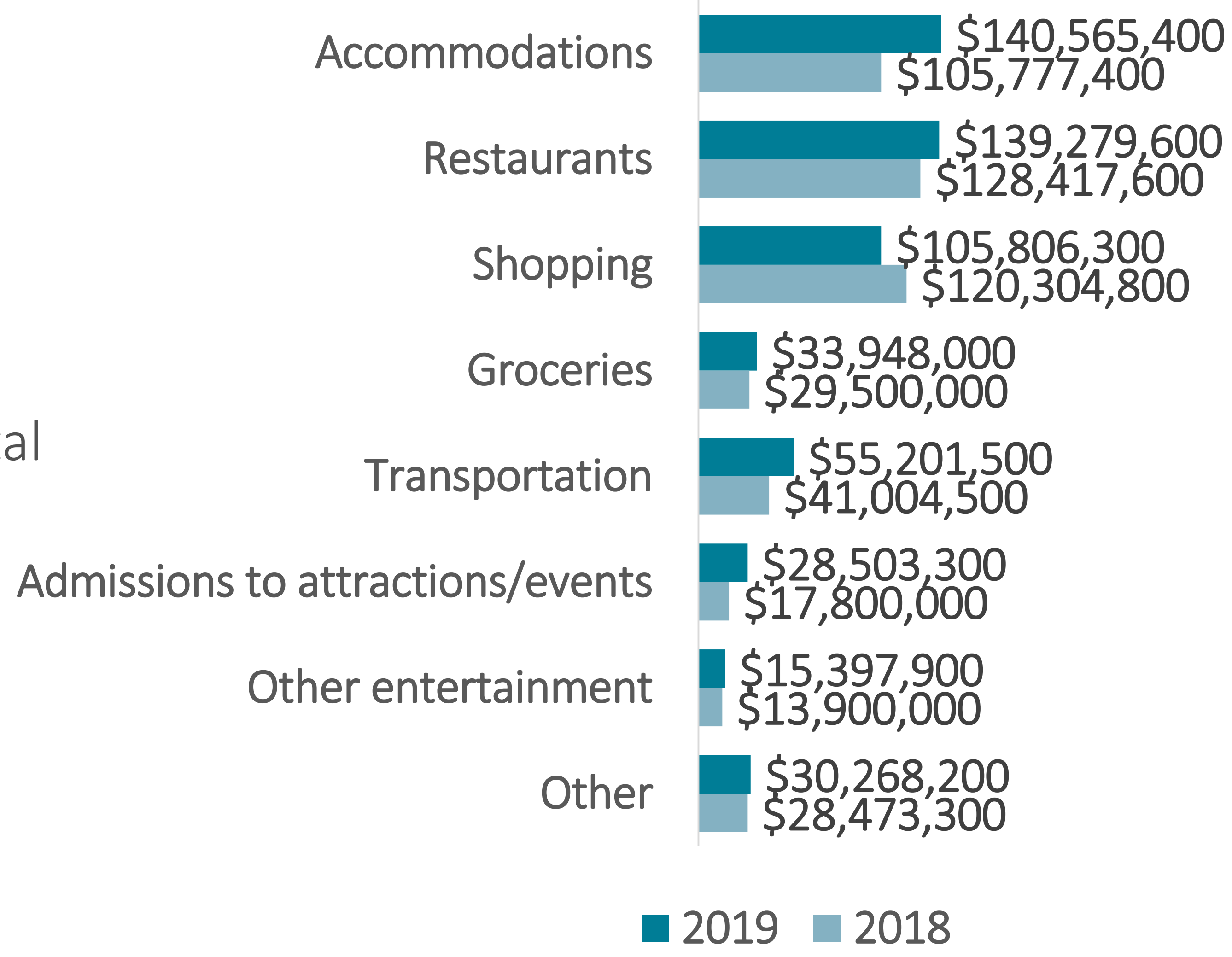
Visitor Expenditures by Visitor Type

July – Sept visitors spent **$548,970,200** in The Beaches of Fort Myers & Sanibel, resulting in a total economic impact of **$891,527,600**, up 13.1% from 2018.



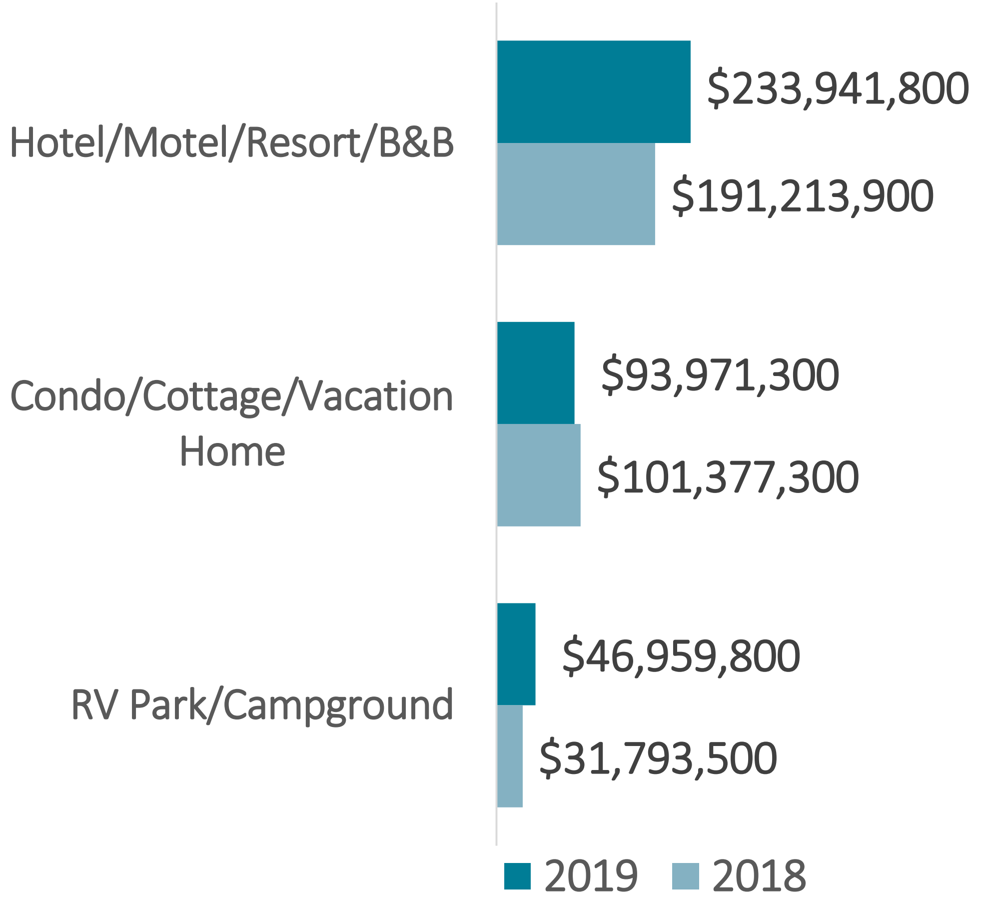
Visitor Expenditures by Spending Category

July – Sept visitors spent **$548,970,200** in The Beaches of Fort Myers & Sanibel, resulting in a total economic impact of **$891,527,600**.



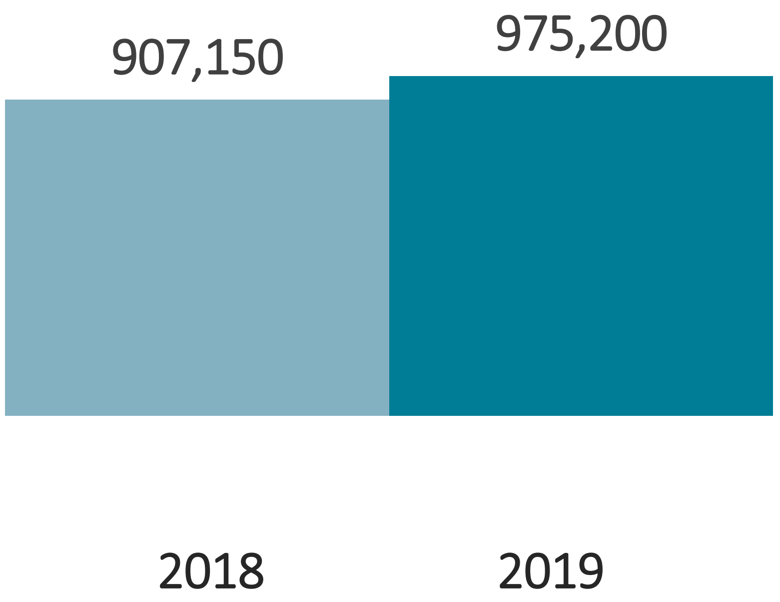
Visitor Expenditures by Lodging Type

July – Sept visitors staying in paid accommodations spent **$374,872,900** in The Beaches of Fort Myers & Sanibel.



Room Nights Generated

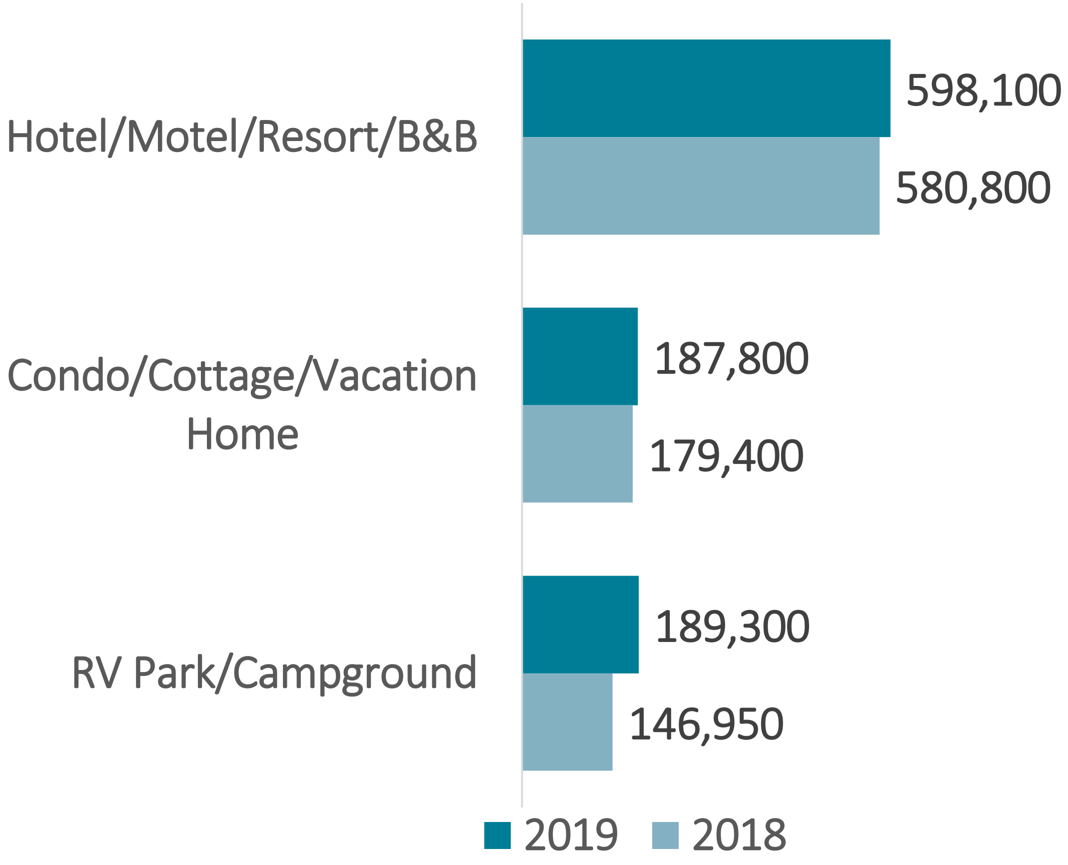
July – Sept visitors spent **975,200**[1] nights in The Beaches of Fort Myers & Sanibel hotels, resorts, condos, rental houses, etc. (+7.5% from 2018).



[1]Source: Occupancy Survey

Room Nights Generated

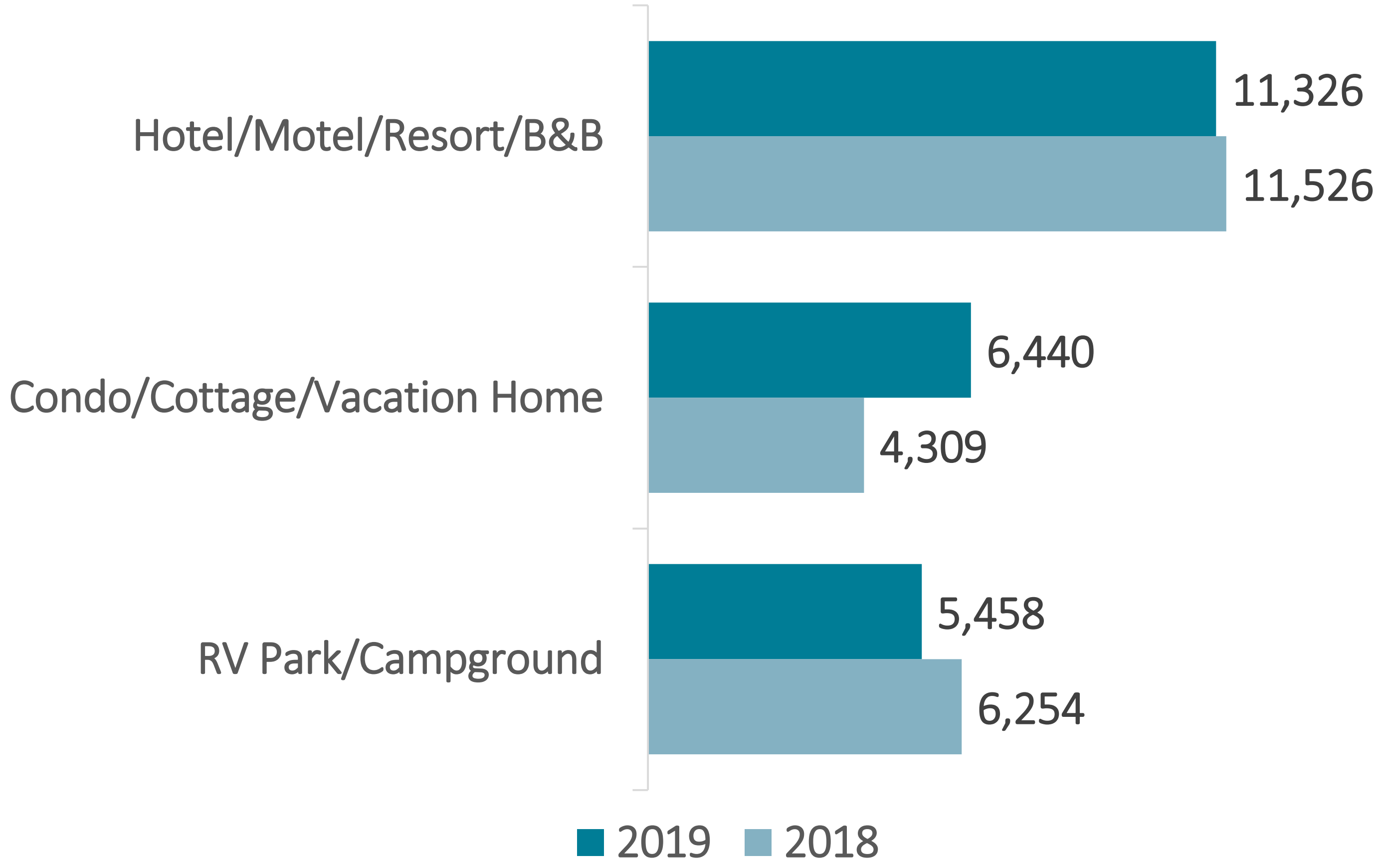
Motels, hotels, etc. accounted for **3 in 5** nights in The Beaches of Fort Myers & Sanibel, while vacation rentals accounted for nearly **1 in 5** nights visitors spent in the area.



[1]Source: Occupancy Survey

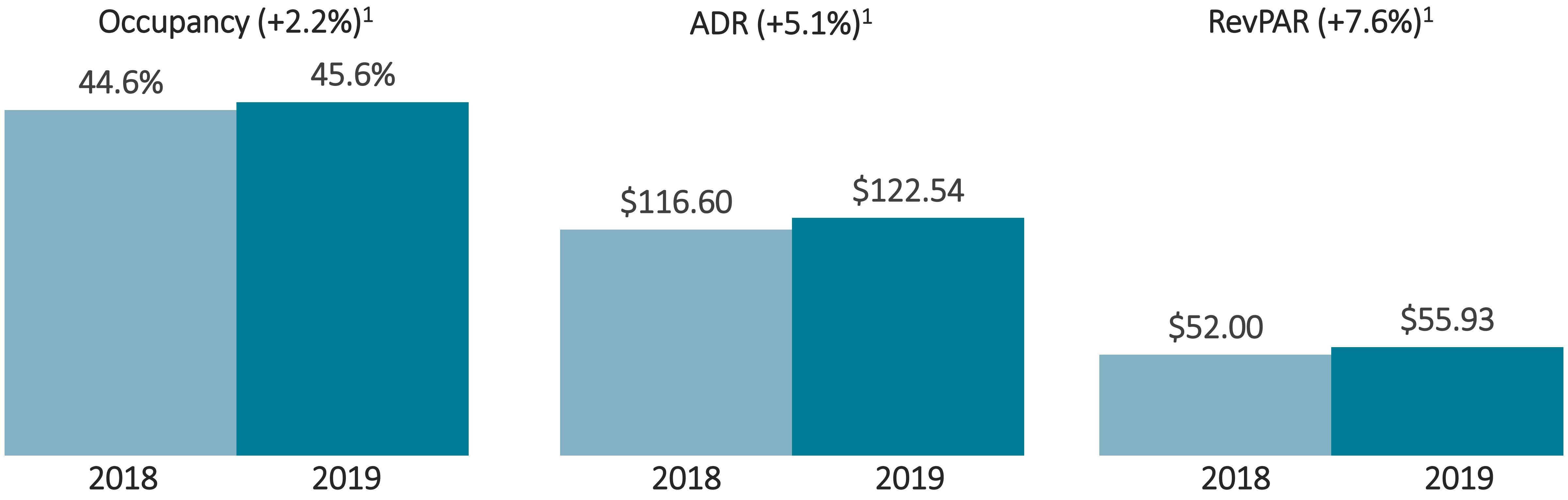
Available Units

There were **23,224**[1] available units in July – Sept, 2019 vs. 22,089 in 2018 (+5.1%). Nearly half of the units were hotels, motels, etc.



[1]Source: Occupancy Survey

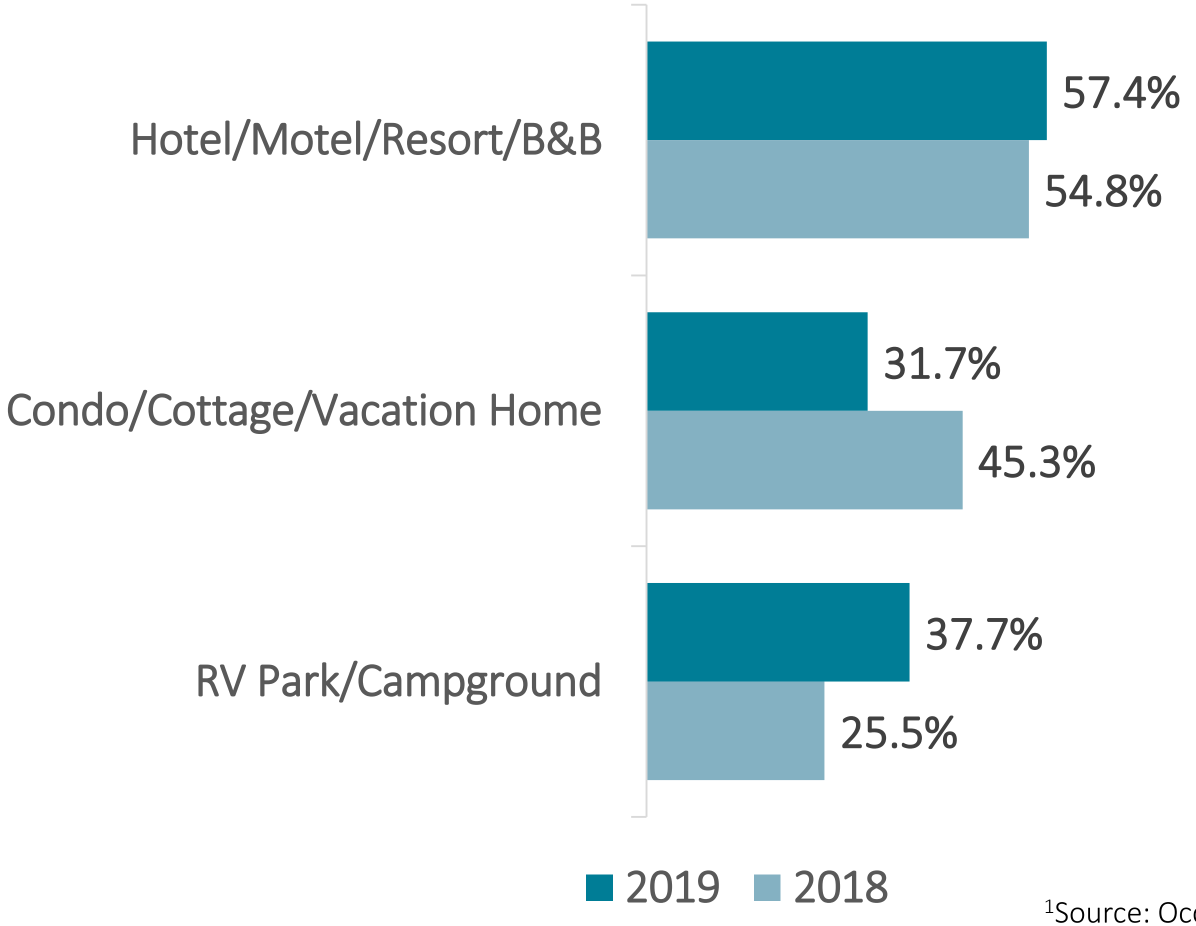
Occupancy, ADR and RevPAR



[1]Source: Occupancy Survey

Occupancy

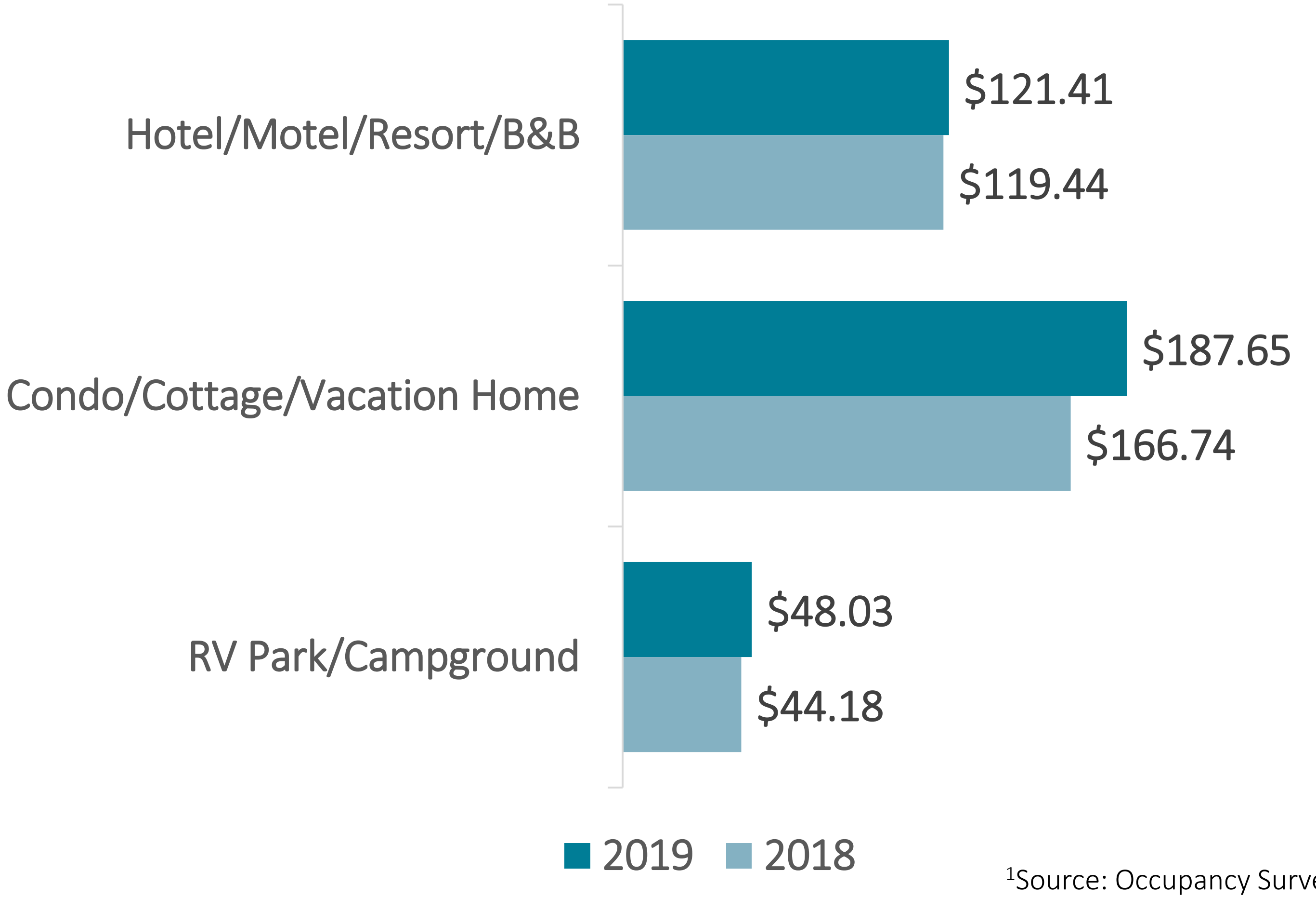
Average occupancy in July – Sept was **45.6%**[1] (44.6% in 2018).



[1]Source: Occupancy Survey

ADR

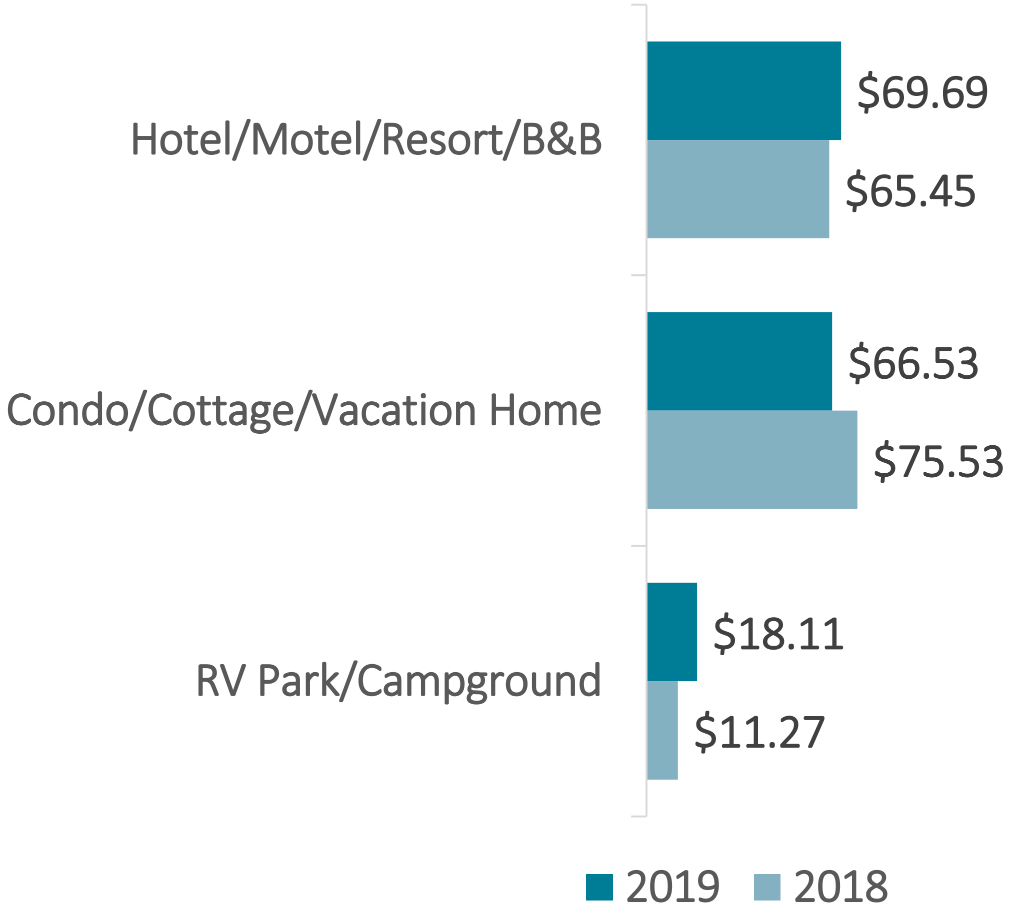
ADR in July – Sept was **$122.54**[1] ($116.60 in 2018).



[1]Source: Occupancy Survey

RevPAR

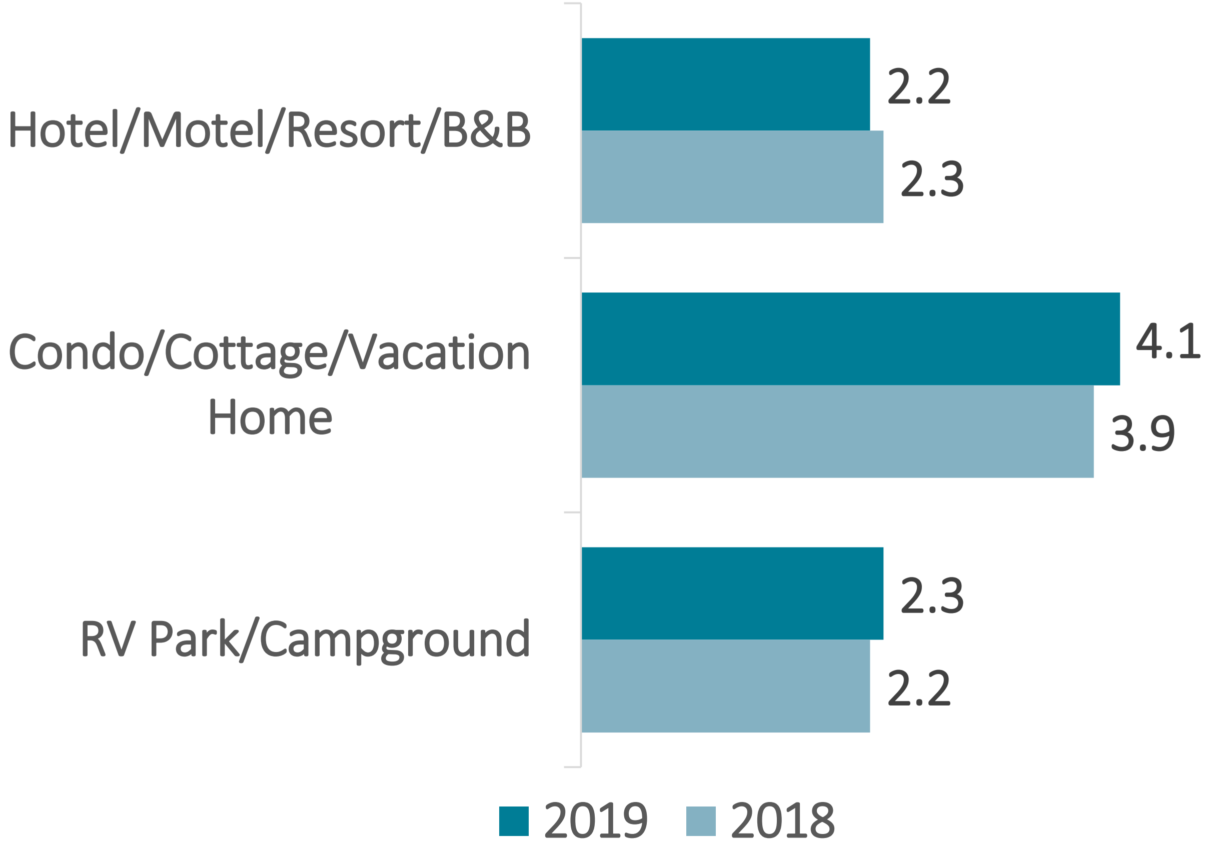
Average RevPAR in July – Sept was **$58.74**[1] ($52.00 in 2018).



[1]Source: Occupancy Survey

Travel Party Size

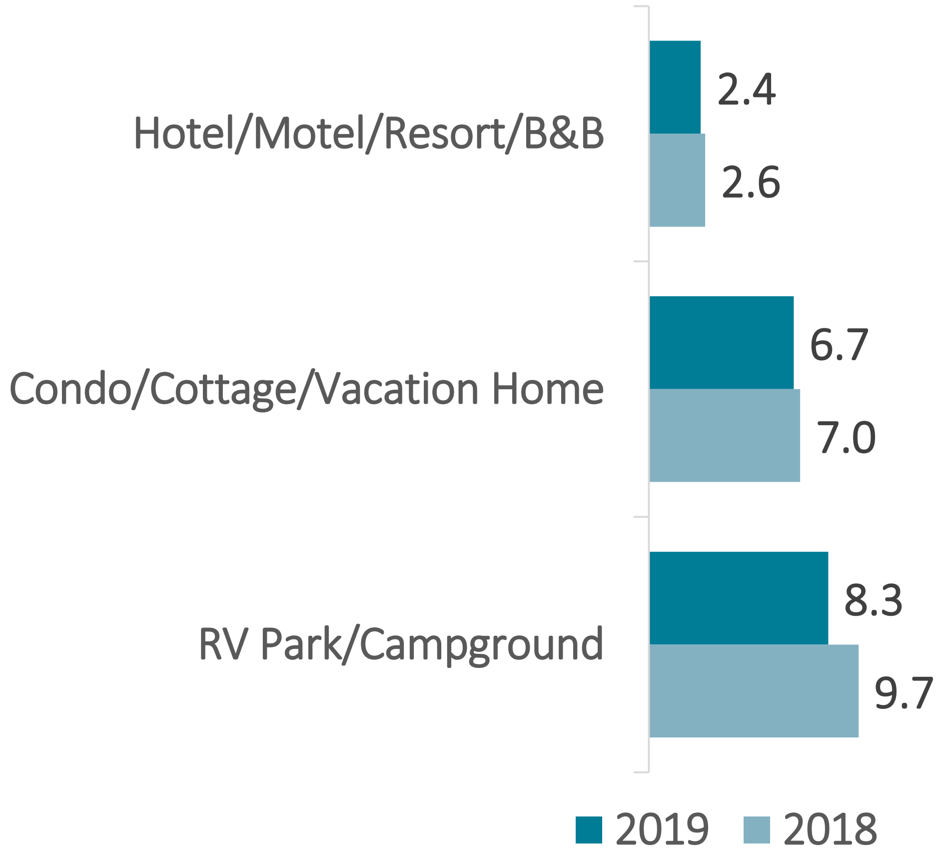
For visitors in paid accommodations, average travel party size in July – Sept was **2.6 people**[1] (2.6 people in 2018).



[1]Source: Occupancy Survey

Length of Stay

For visitors in paid accommodations, average length of stay in July – Sept was **3.5 nights**[1] (4.0 nights in 2018).



[1]Source: Occupancy Survey

Visitor Journey: Pre-Visit

Pre-Visit

Travel Party Profile

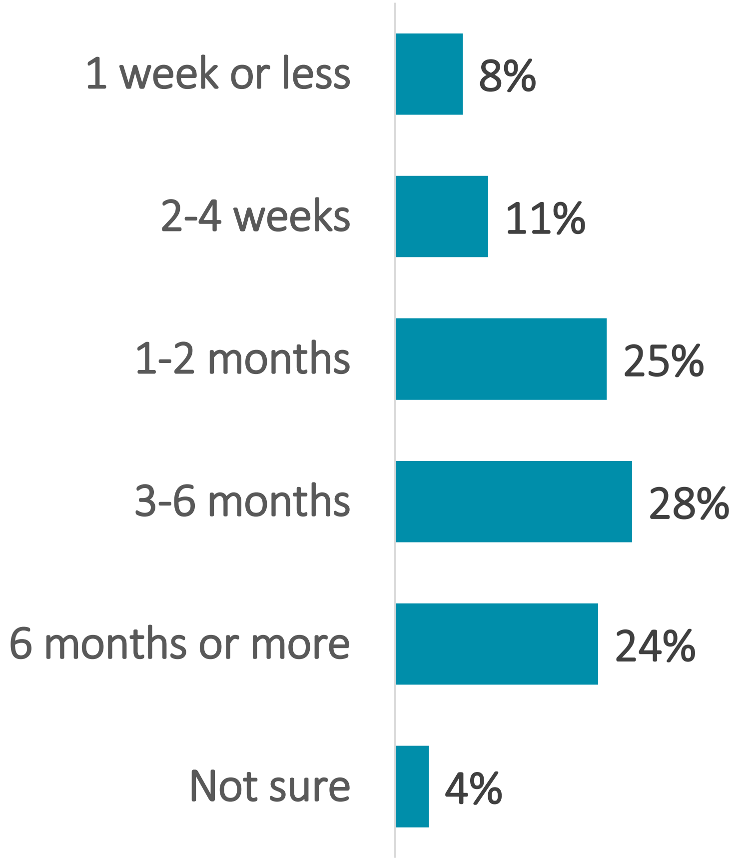
Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

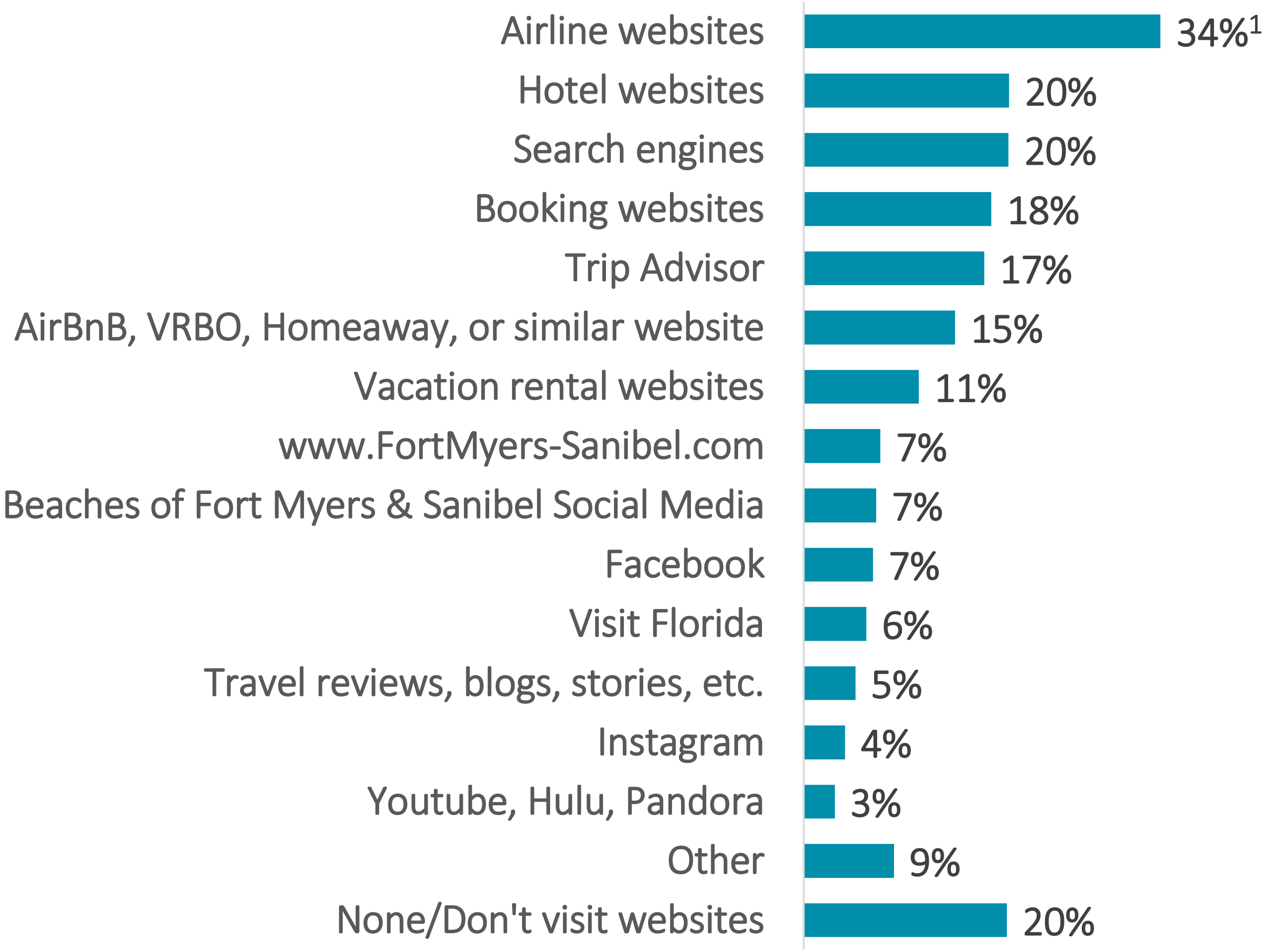
Trip Planning Cycle

Nearly **6 in 10** visitors planned their trip at least 3 months in advance, while only **19%** planned their trip less than a month in advance.



Trip Planning: Websites Used

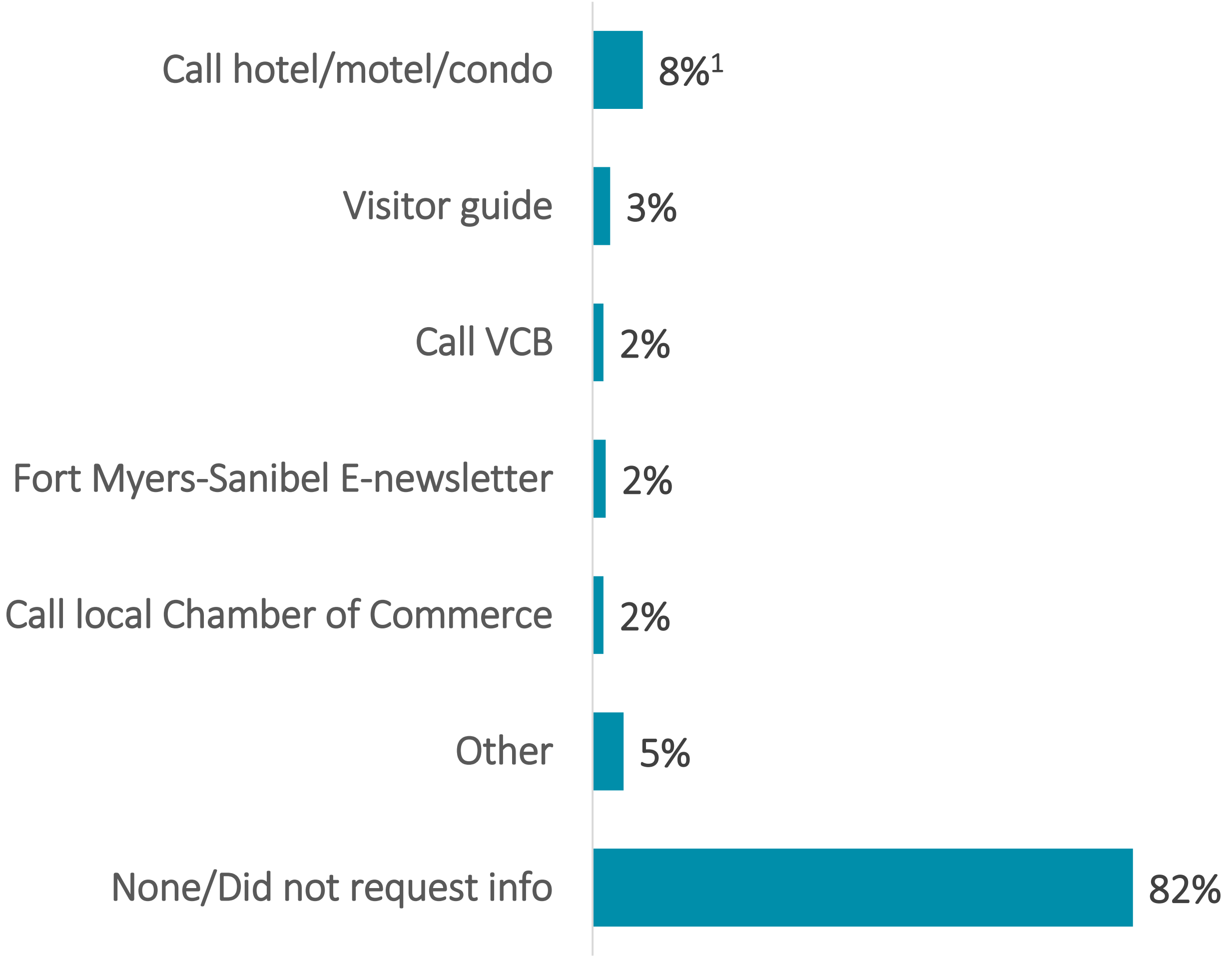
8 in 10 visitors used websites to plan their trip to The Beaches of Fort Myers & Sanibel.



[1]Multiple responses permitted.

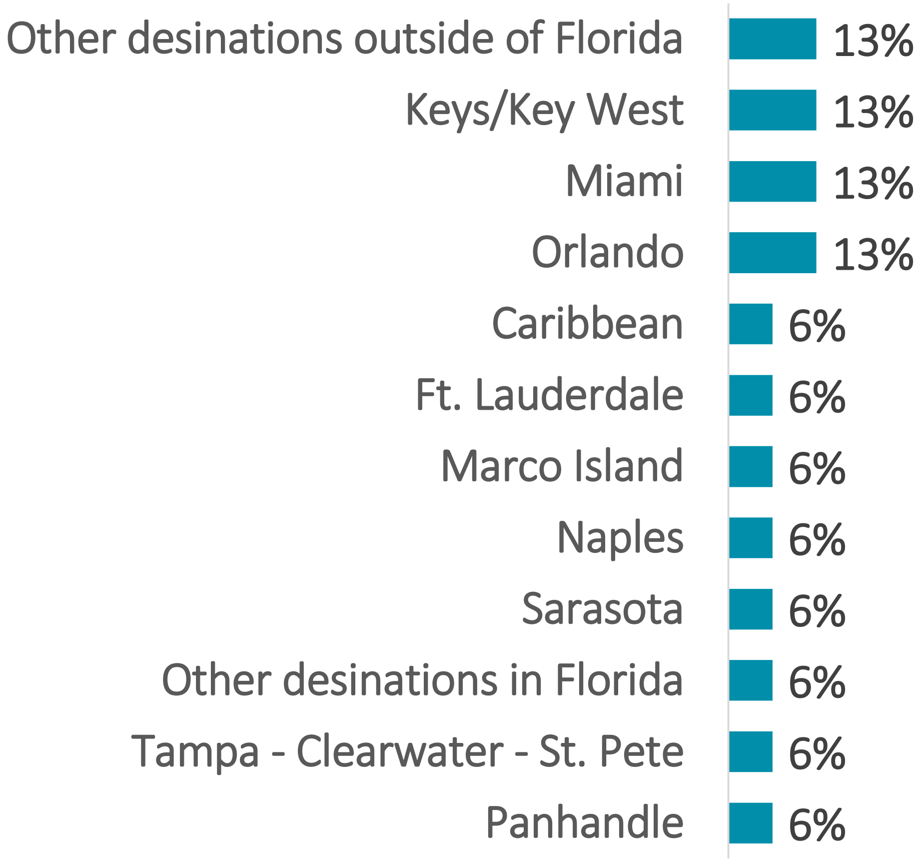
Trip Planning: Information Requests

2 in 10 visitors made information requests to plan their trip to The Beaches of Fort Myers & Sanibel.



[1]Multiple responses permitted.

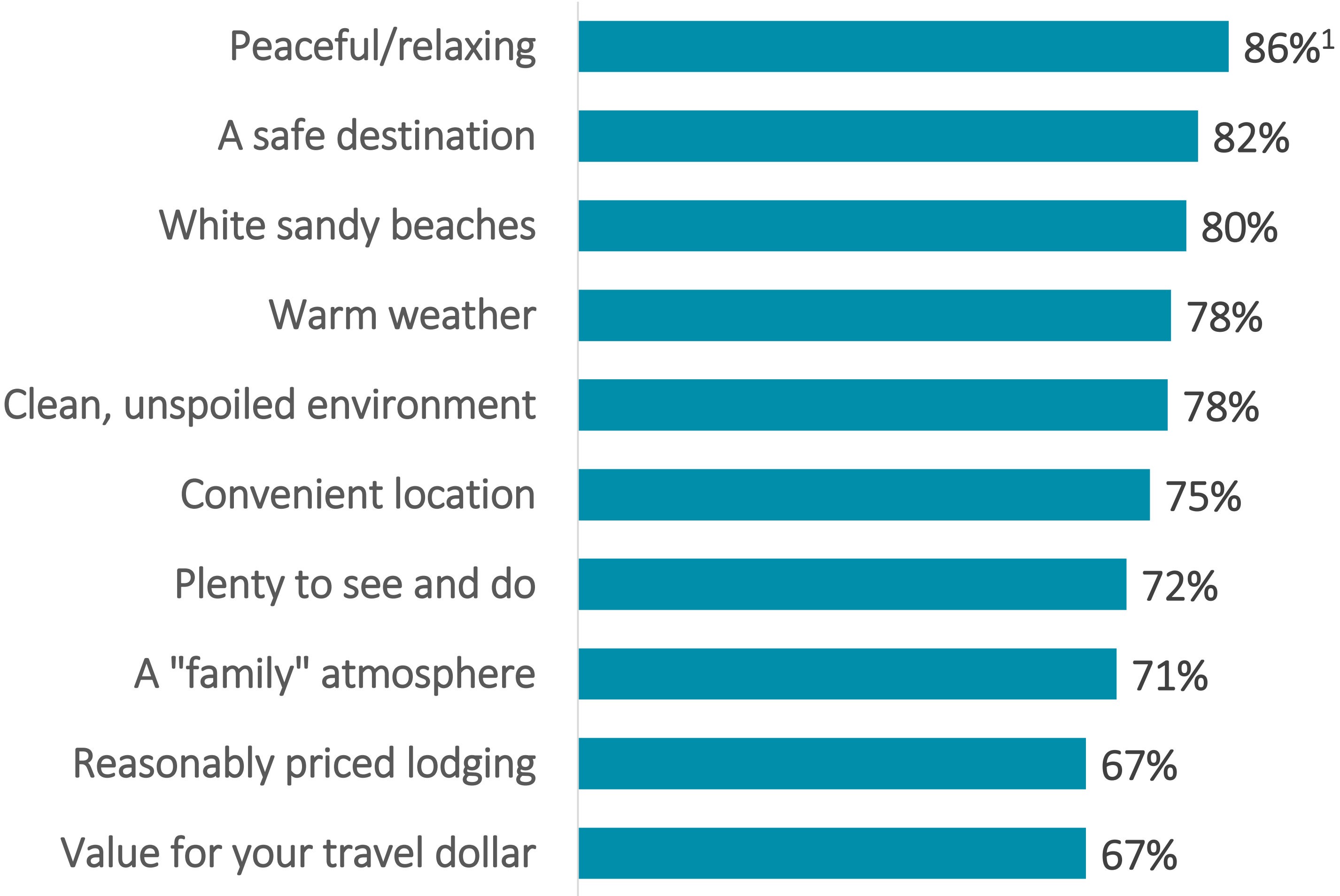
Trip Planning: Other destinations considered



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

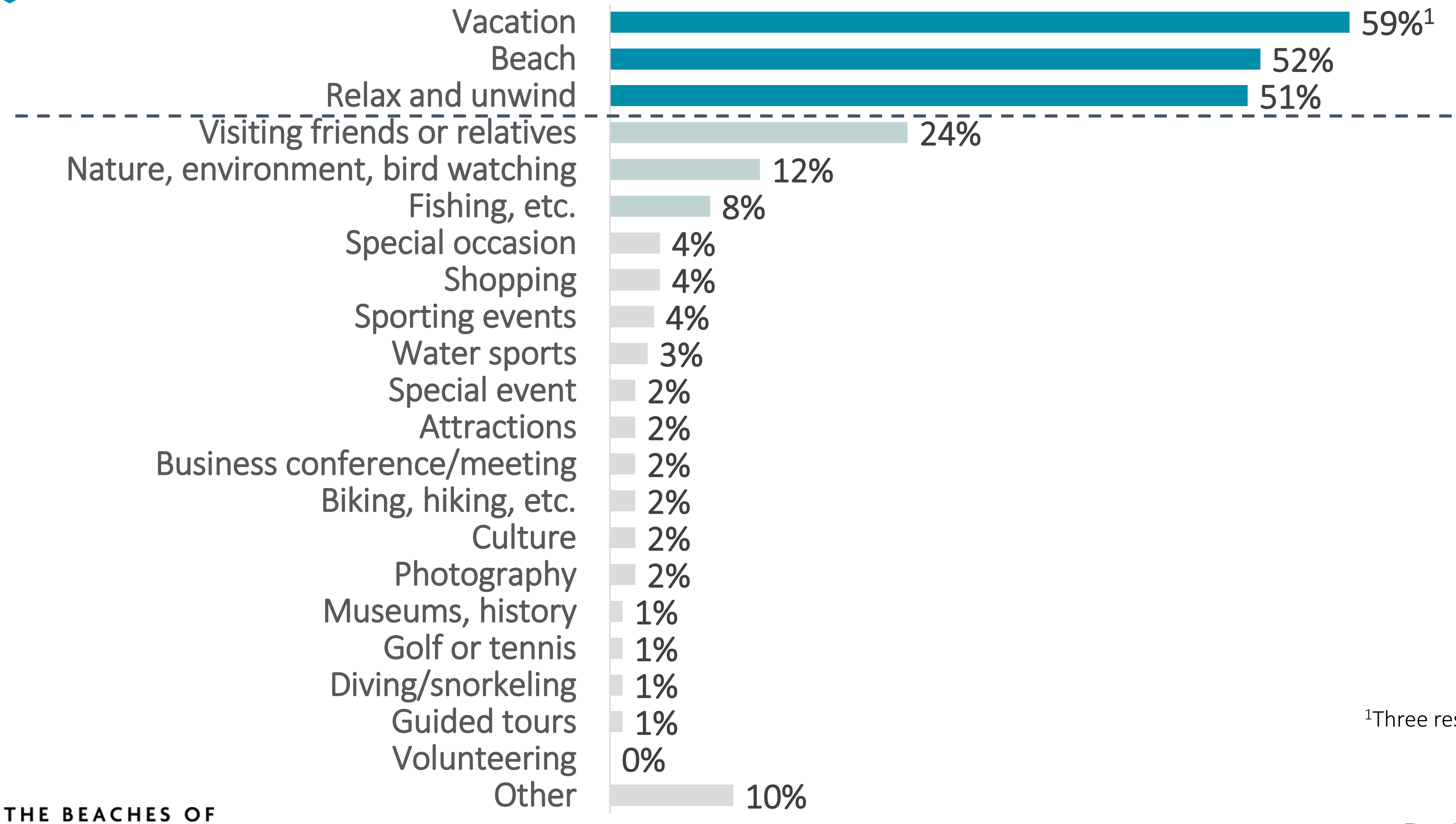
Trip Influencers

Over **8 in 10** visitors were heavily influenced by The Beaches of Fort Myers & Sanibel being peaceful and safe when thinking about visiting.



[1]Top 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

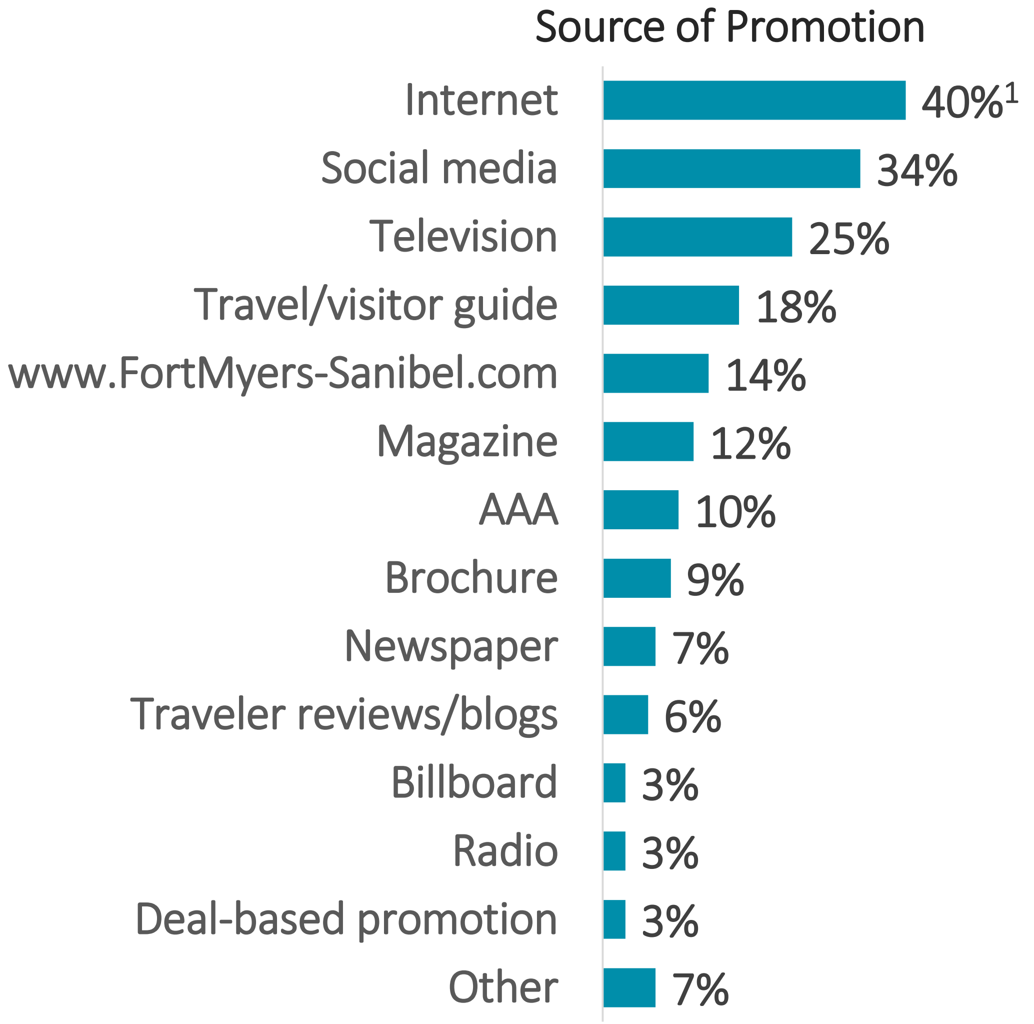


[1]Three responses permitted.

Pre-Visit
July – Sept 2019

Promotions

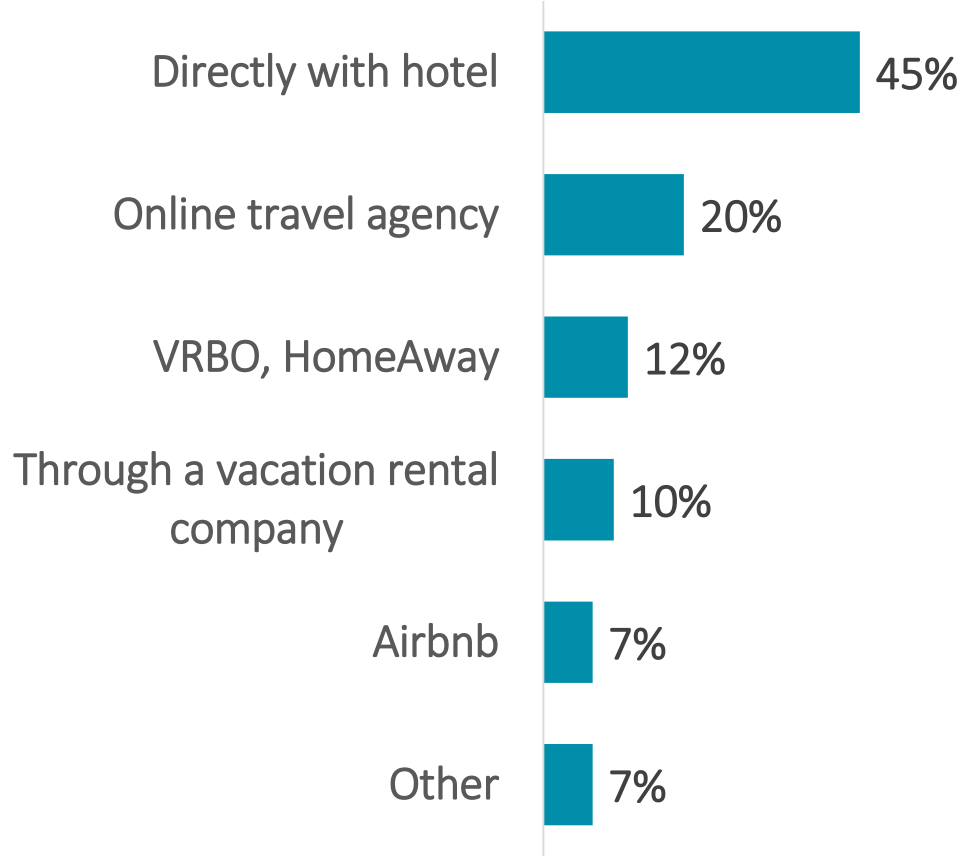
31% of visitors recalled promotions in the past 6 months for The Beaches of Fort Myers & Sanibel.



[1]Multiple responses permitted.

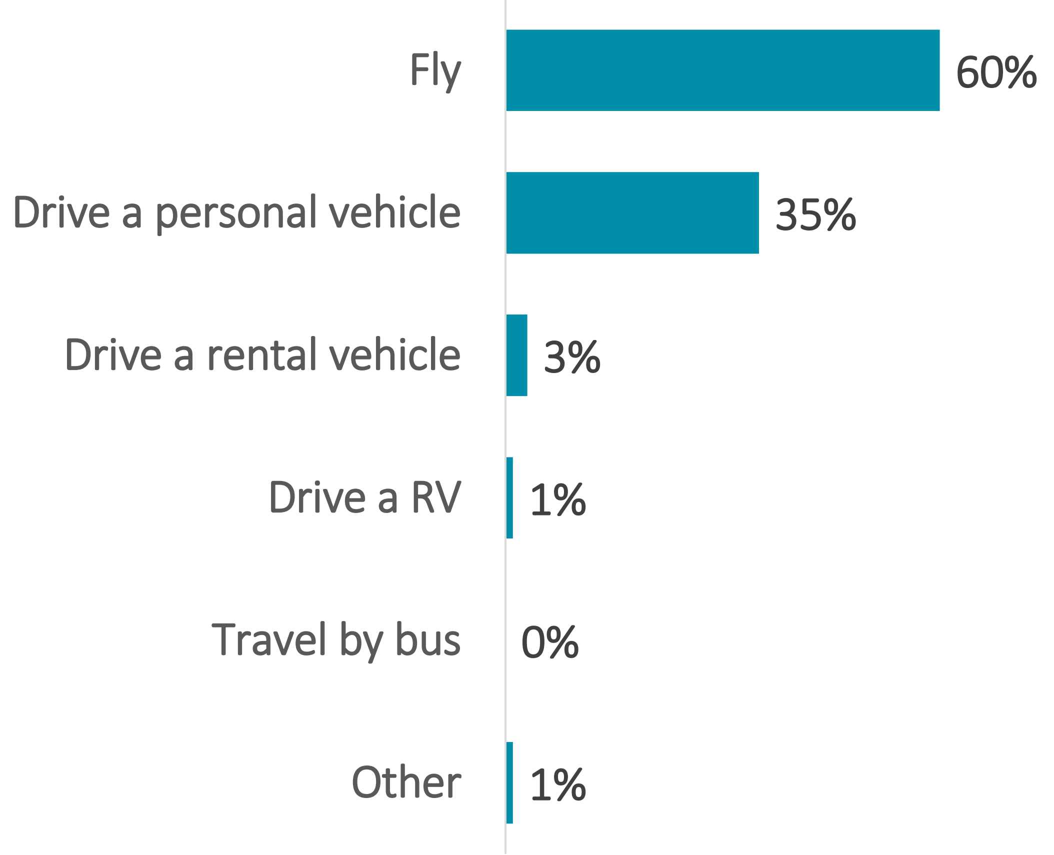
Booking

Nearly **half** of visitors who stayed in paid accommodations booked directly with a hotel/condo.



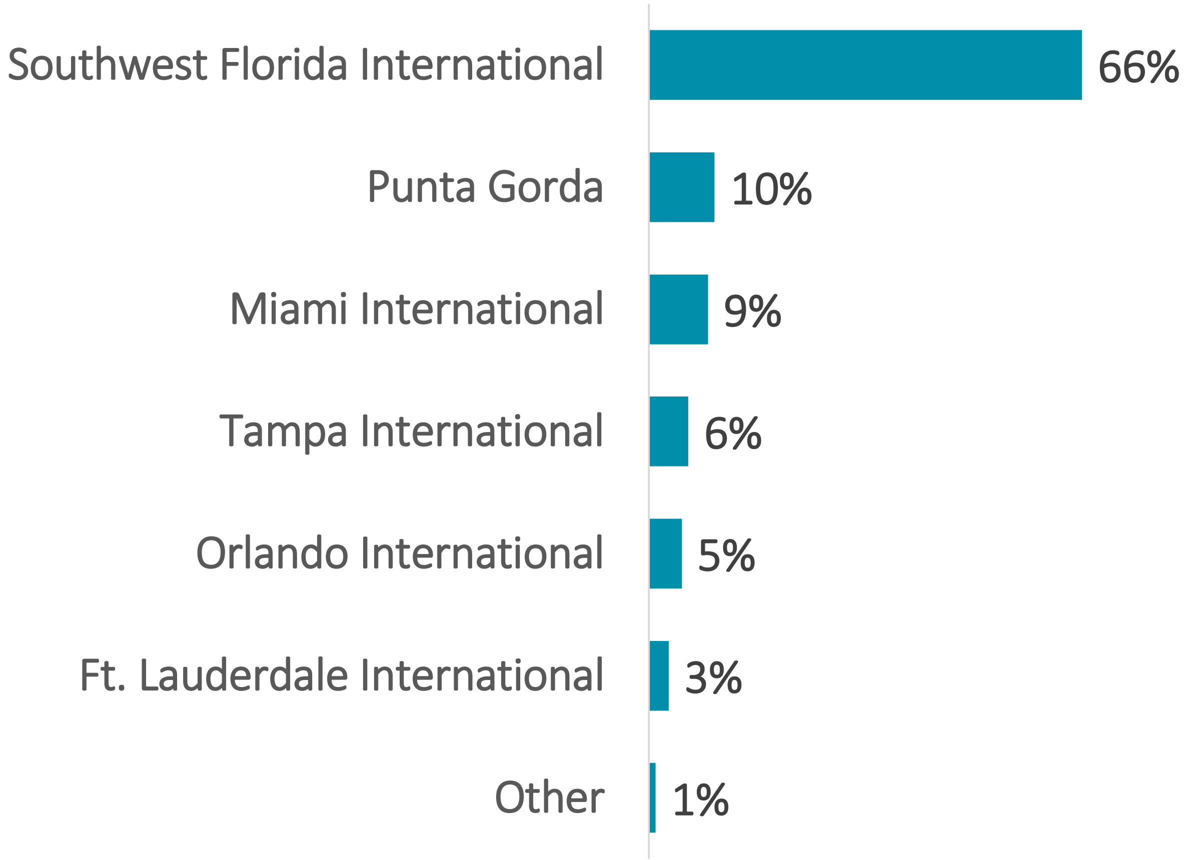
Transportation

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



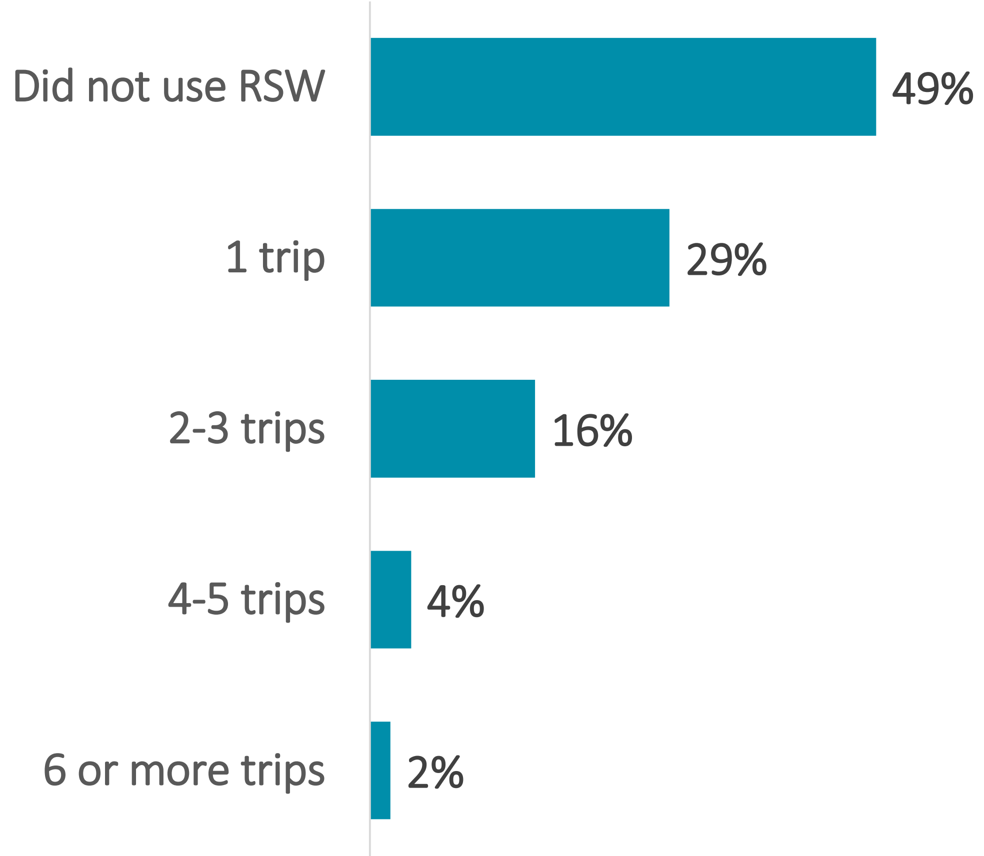
Airport

2 in 3 visitors who flew to The Beaches of Fort Myers & Sanibel came through RSW.



Use of RSW in the Past Year

51% of visitors used RSW at least once in the past year.



Visitor Journey: Travel Party Profile

Pre-Visit

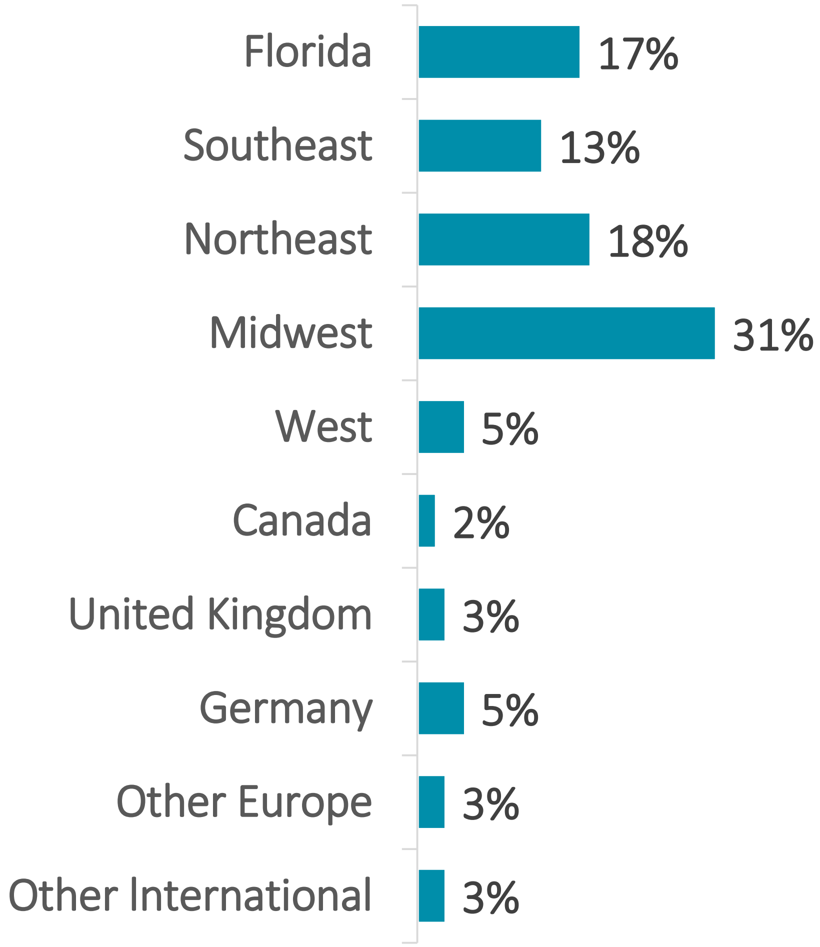
Travel Party Profile

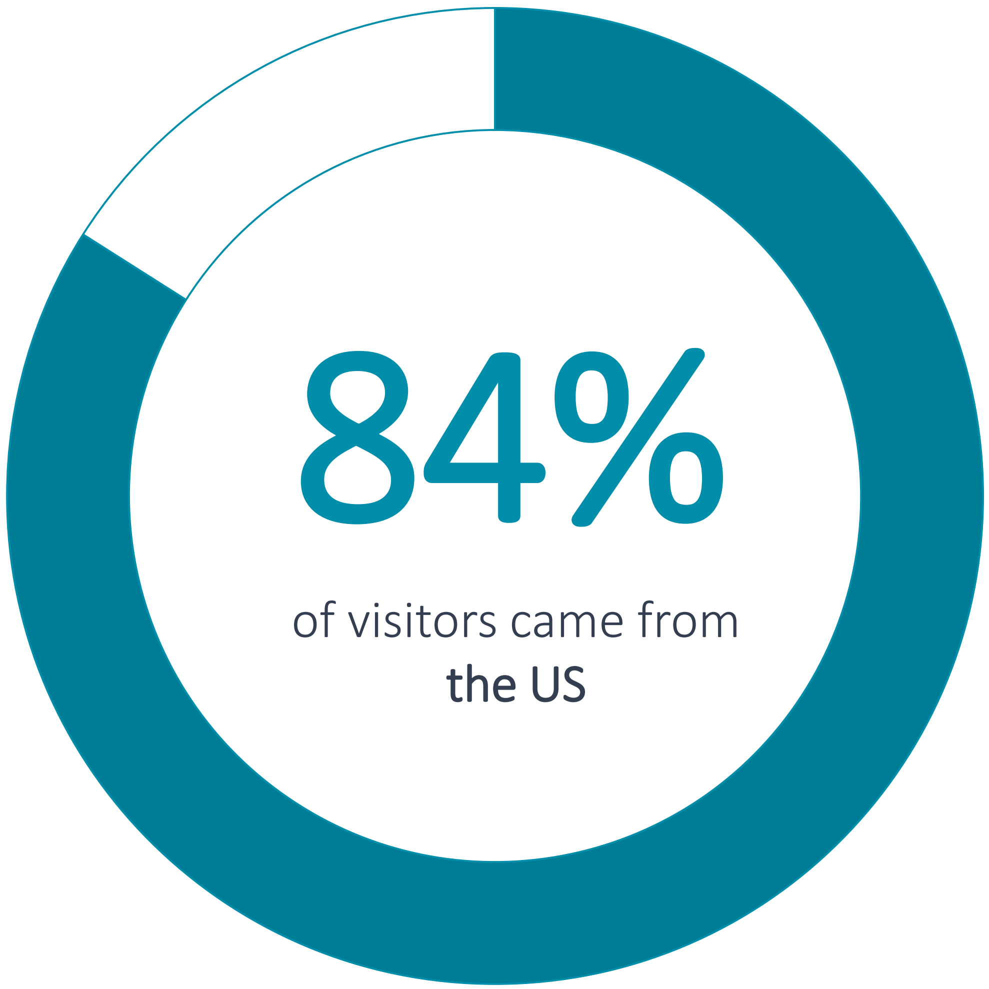
Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

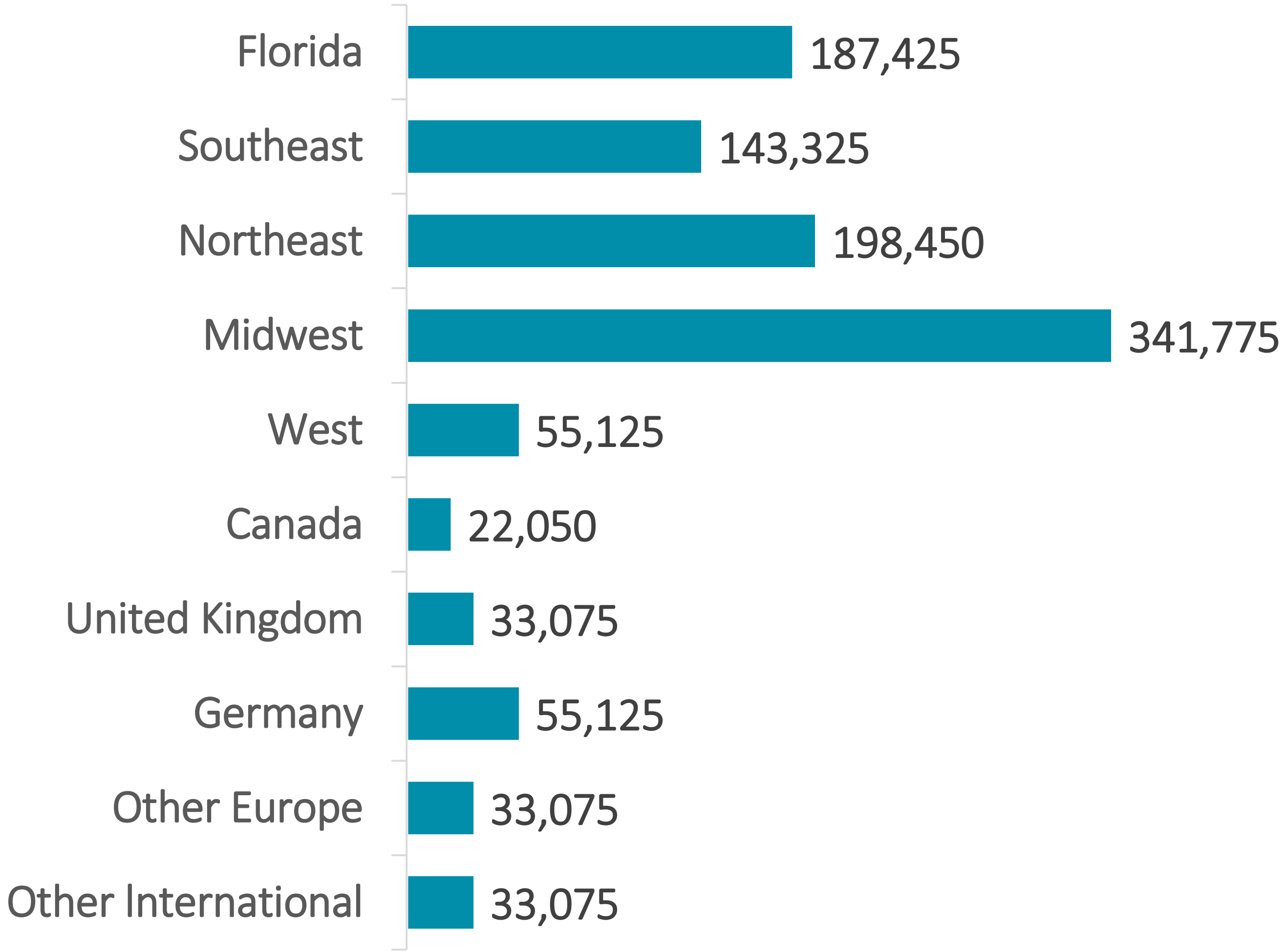
Origin[1]





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

Number of Visitors by Origin



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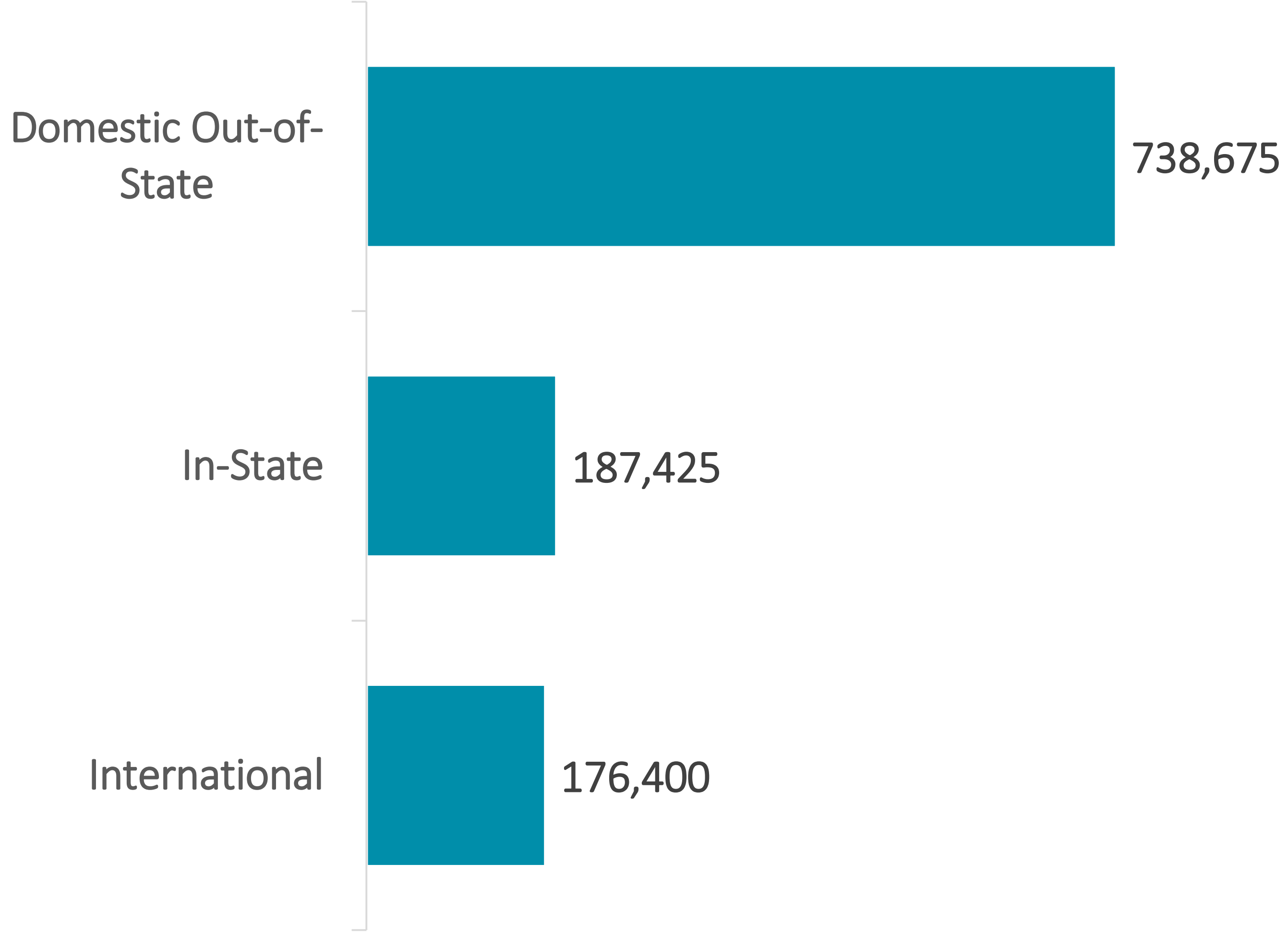
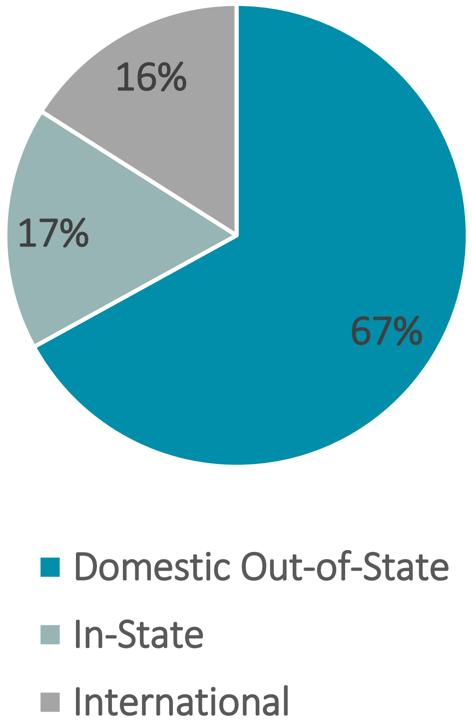




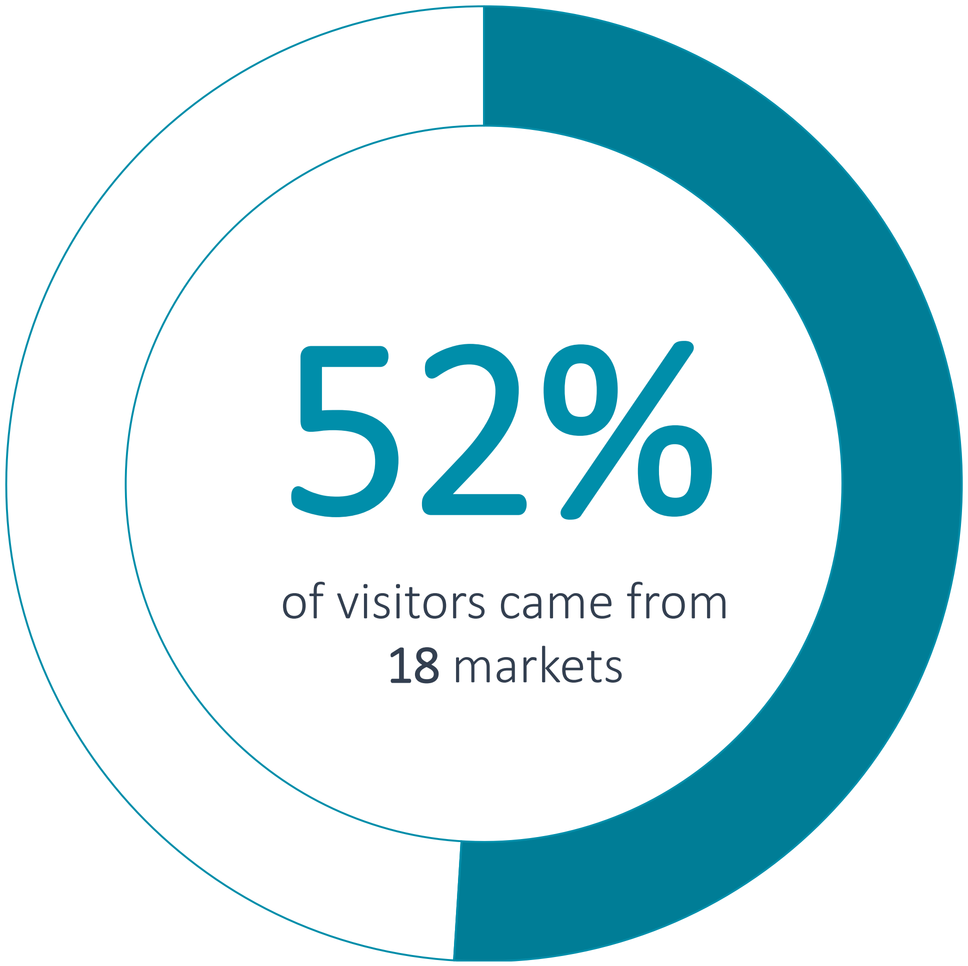
Origin Country

Country[1]	% of Visitors
United States	84%
Germany	5%
United Kingdom	3%
Canada	2%
Other	6%

[1] 1% or fewer visitors came from Bolivia, Brazil, Cayman Island, China, Columbia, Denmark, Dominican Republic, Japan, Norway, Pakistan, Puerto Rico, Scotland, Spain, Sweden, Switzerland, The Netherlands, and Vietnam.

Origin Markets[1]

Market	Percentage of Visitors
New York City	6%
Miami-Ft. Lauderdale	6%
Chicago	5%
Cincinnati	4%
Tampa-Clearwater-St. Petersburg	4%
Boston	3%
Columbus, OH	2%
Minneapolis	2%
Naples	2%
St Louis	2%
Cleveland	2%
Lakeland, FL	2%
Denver-Aurora-Broomfield, CO	2%
Atlanta	2%
Pittsburgh	2%
Philadelphia	2%
Washington DC-Baltimore	2%
Indianapolis	2%



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

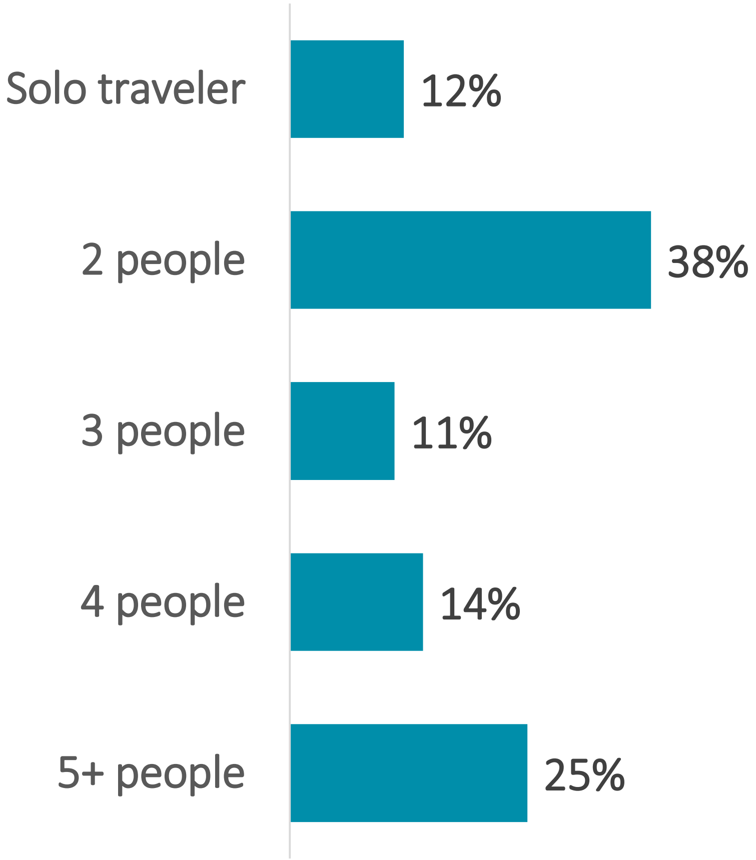
Travel Party Size and Composition

Travel Party Size

Visitors traveled in a party composed of 3.5[1] people.

Travel with Children

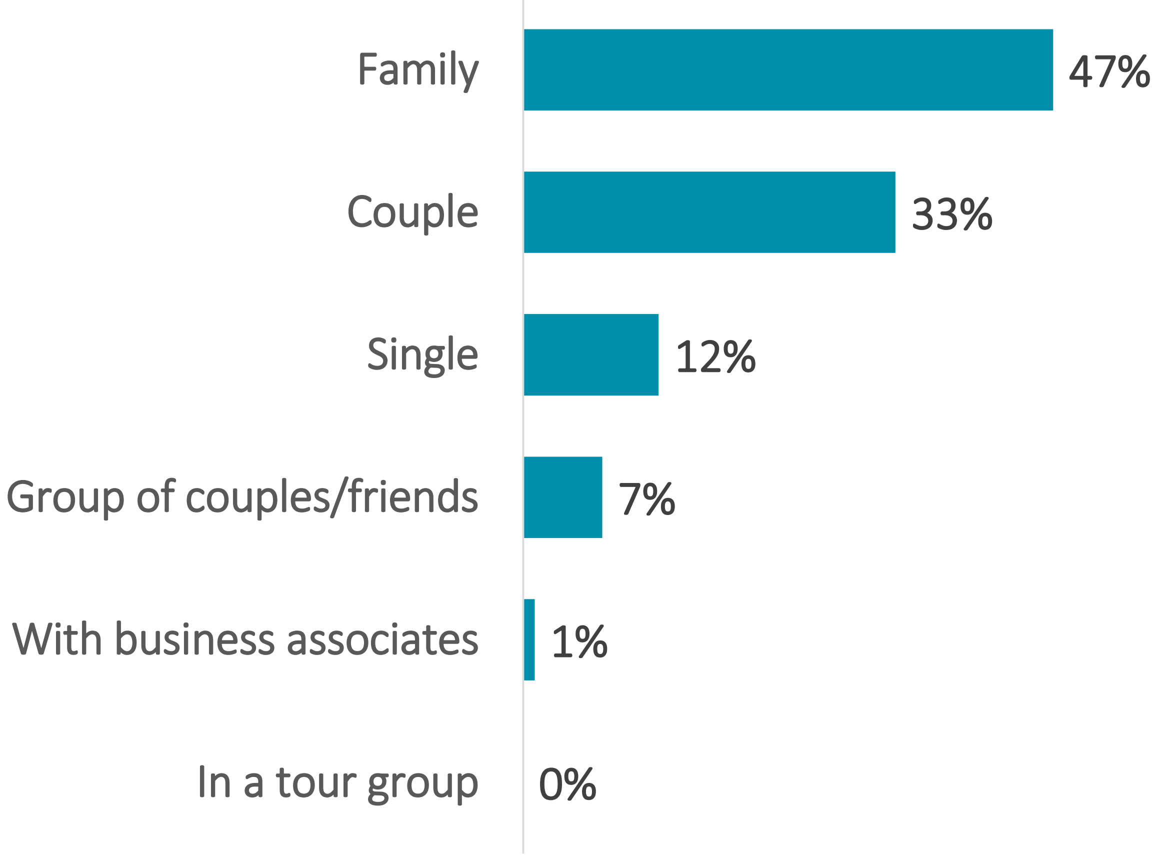
36% of visitors traveled with children under the age of 18.



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

Travel Party Type

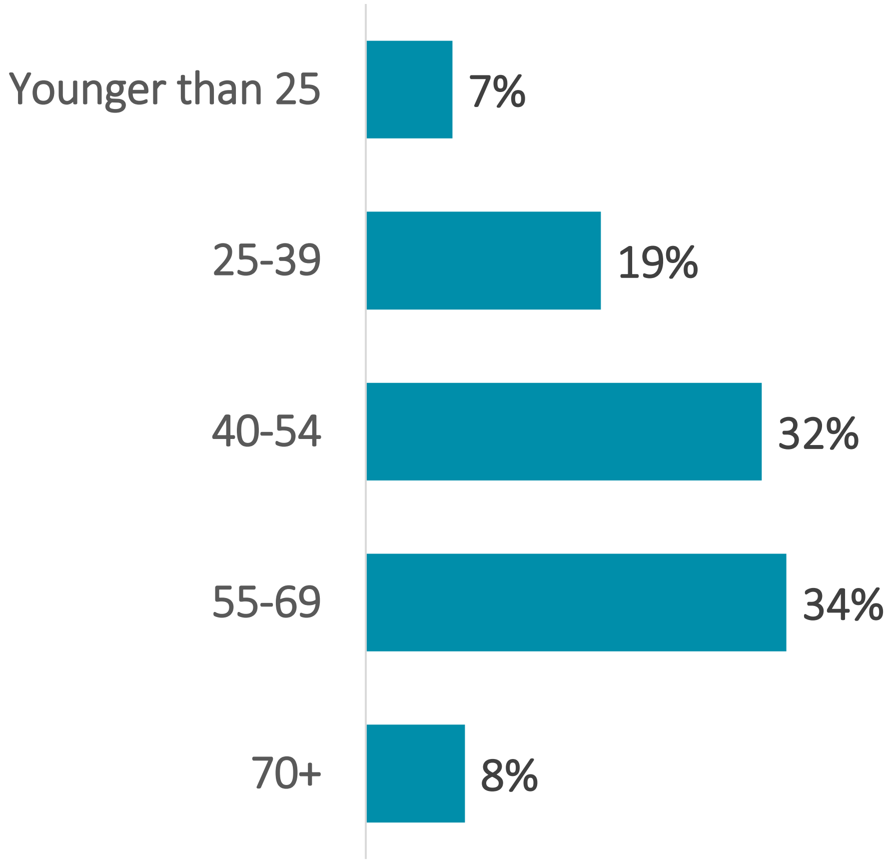
33% of visitors traveled as a couple, while **47%** traveled as a family.



Age

Average Age

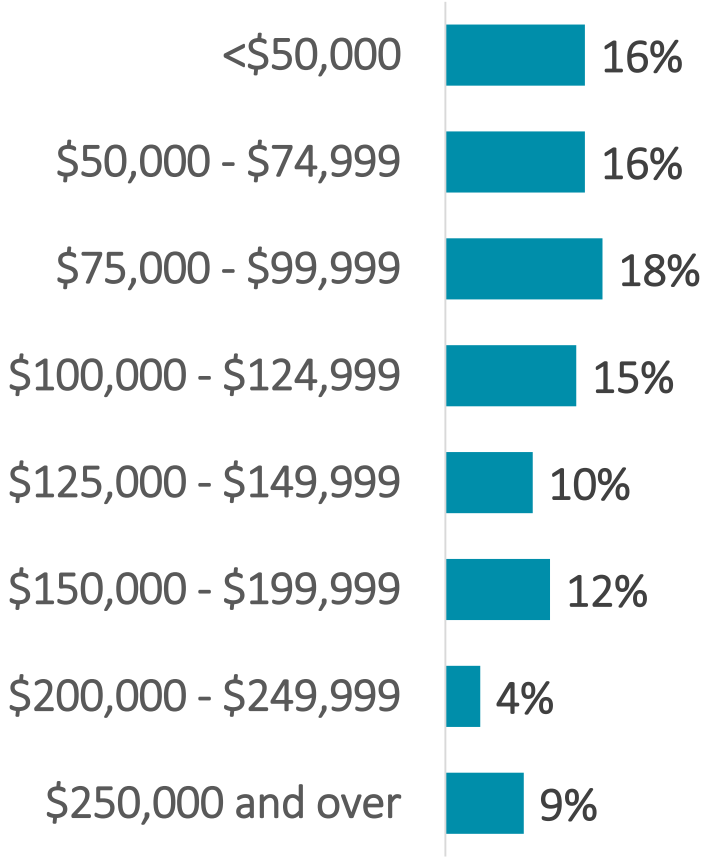
The average age of July – Sept visitors was **50 years old.**



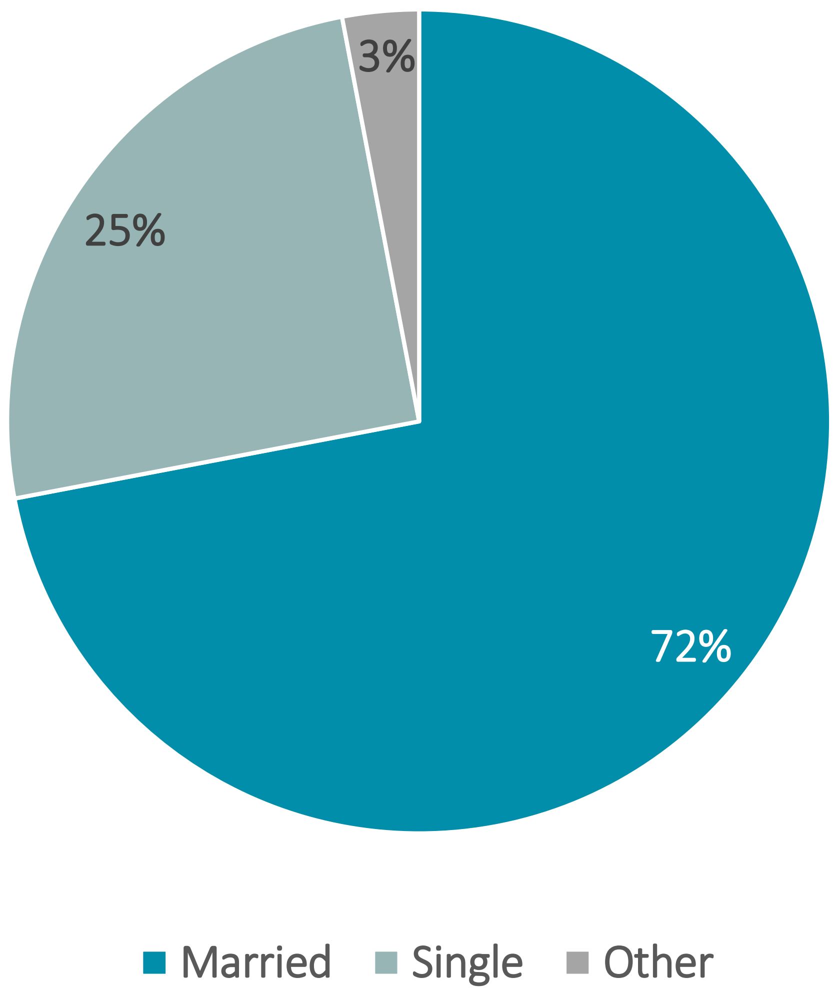
Household Income

Median Household Income
July – Sept visitors had a median household income of **$100,000.**

Estimate Average Household Income
The estimated average household income was **$121,000.**



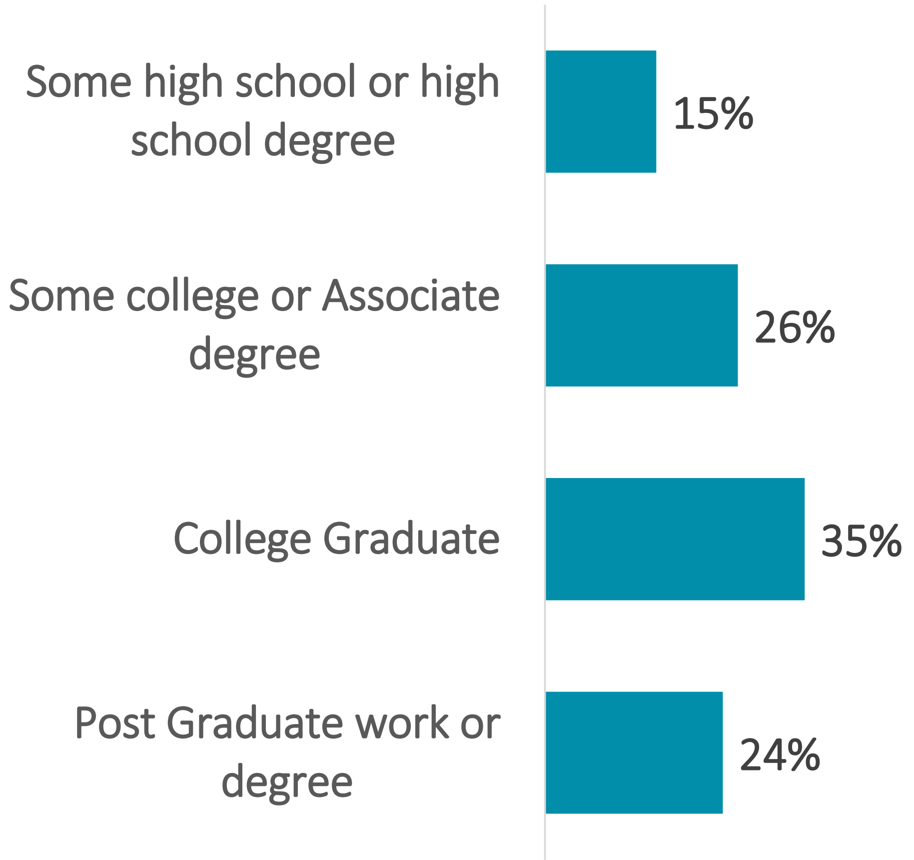
Marital Status



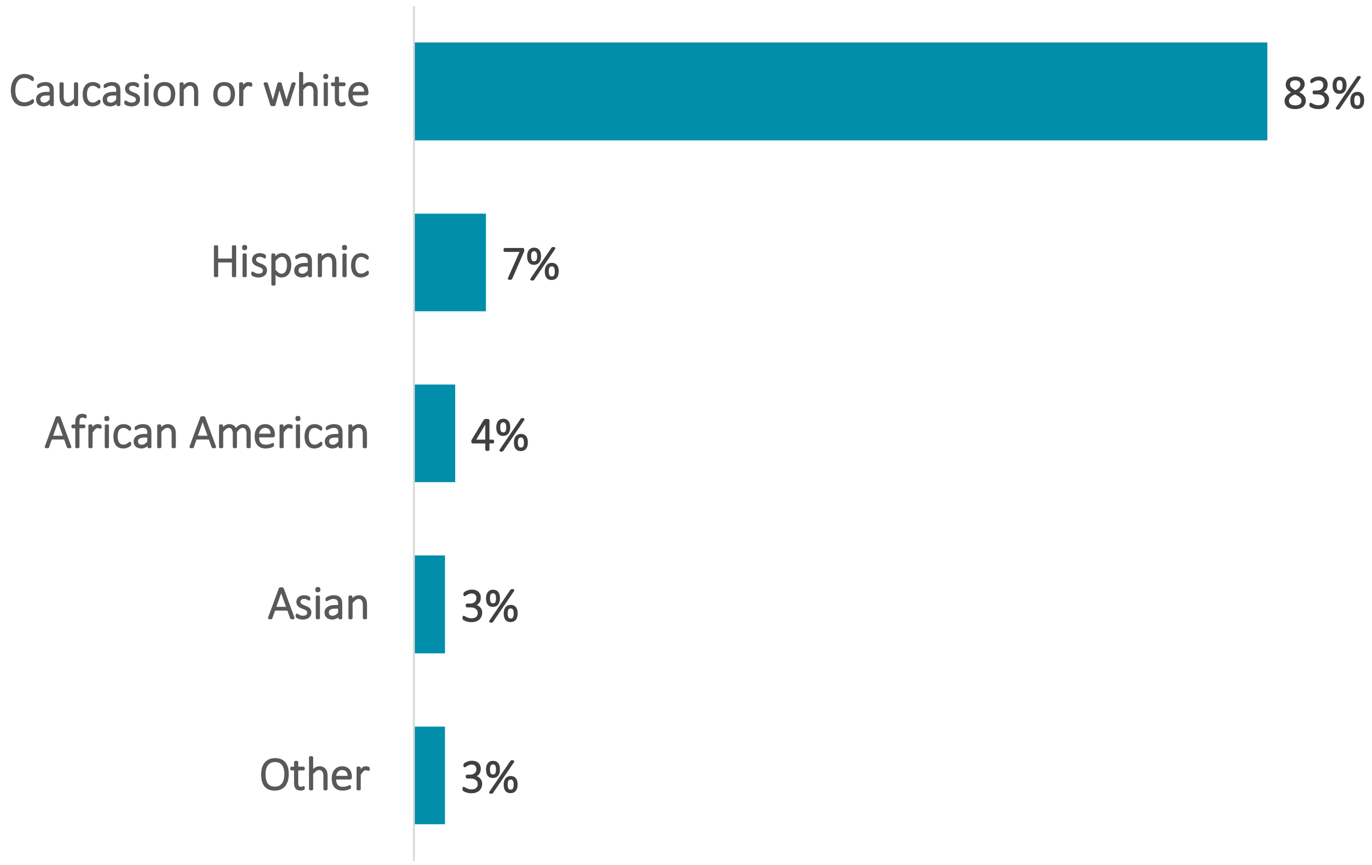
Education

College Education

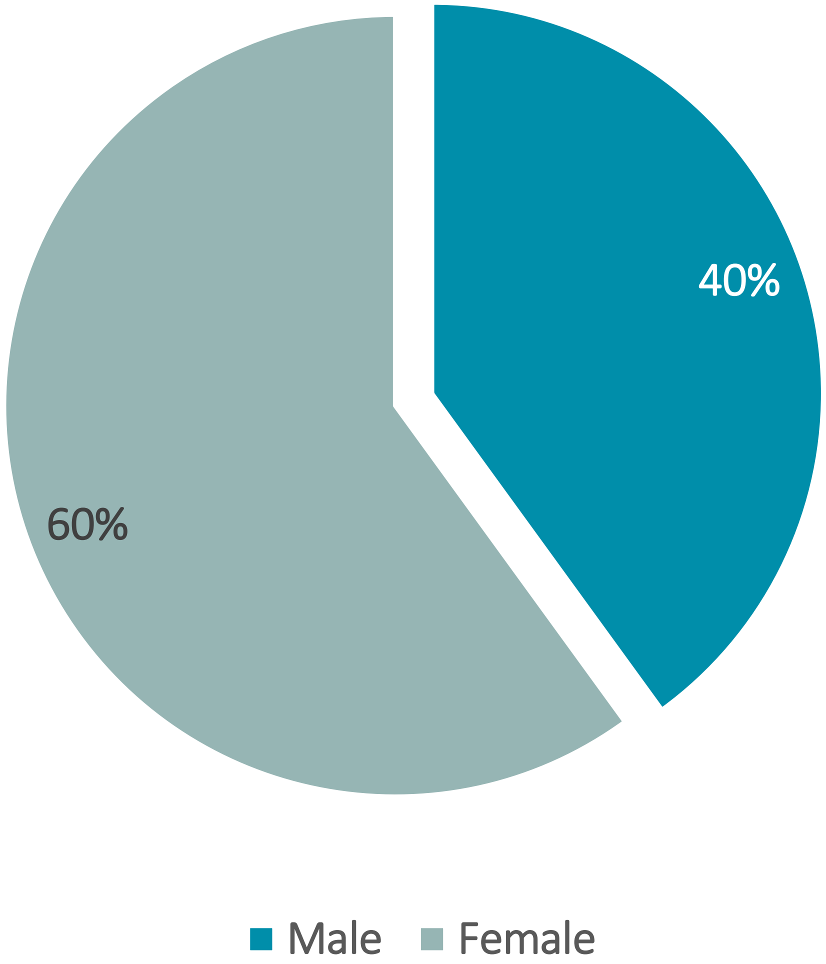
59% of July – Sept visitors were college graduates.



Race/Ethnicity



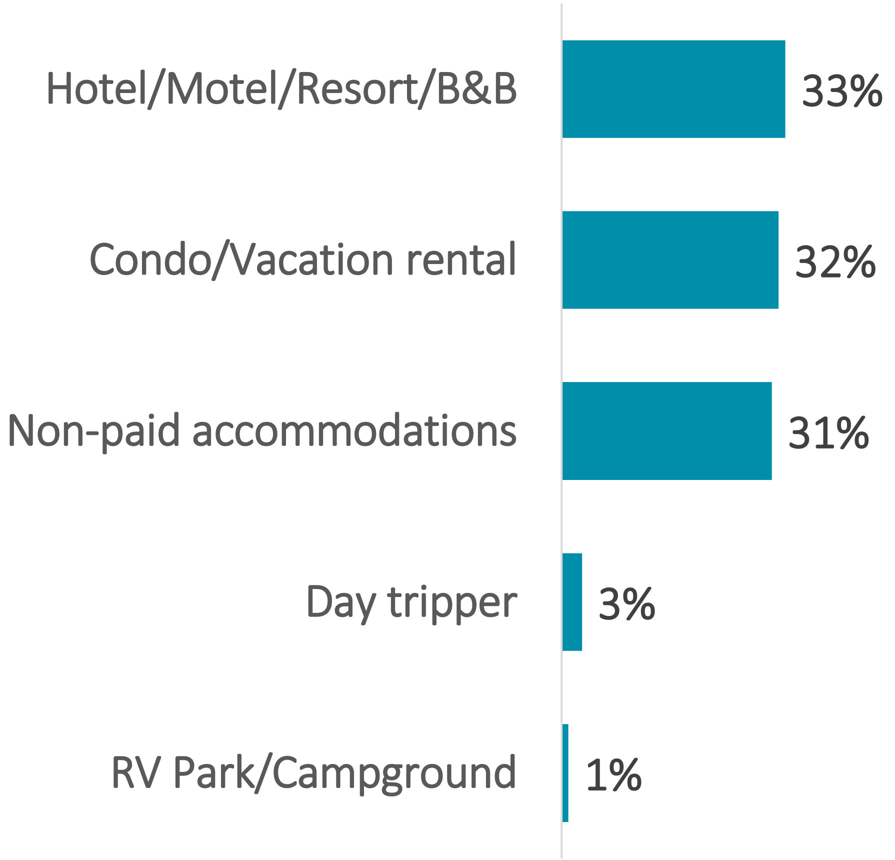
Gender



Visitor Journey: Trip Experience

Accommodations

1 in 3 visitors stayed in non-paid accommodations, a condo/vacation rental, or a hotel/motel/resort/B&B.



Nights Stayed

All Visitors

Visitors spent 7.7[1] nights in The Beaches of Fort Myers & Sanibel.

Visitors Staying in Paid Accommodations

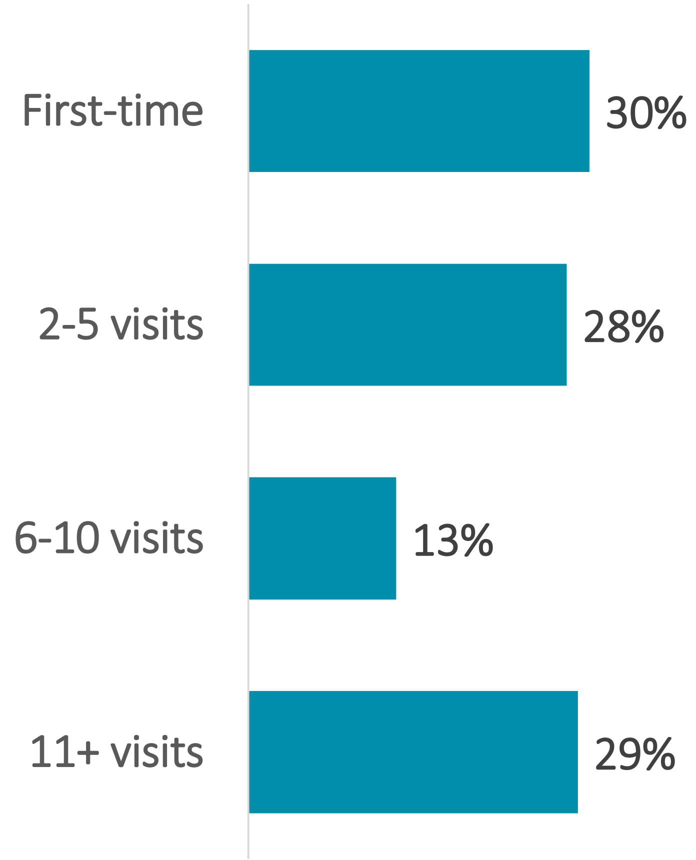
Visitors staying in paid accommodations spent 6.5[2] nights in The Beaches of Fort Myers & Sanibel.

[1]When including extended stay visitors, average nights stayed for all visitors was 8.1 nights. Source: Visitor Tracking Survey

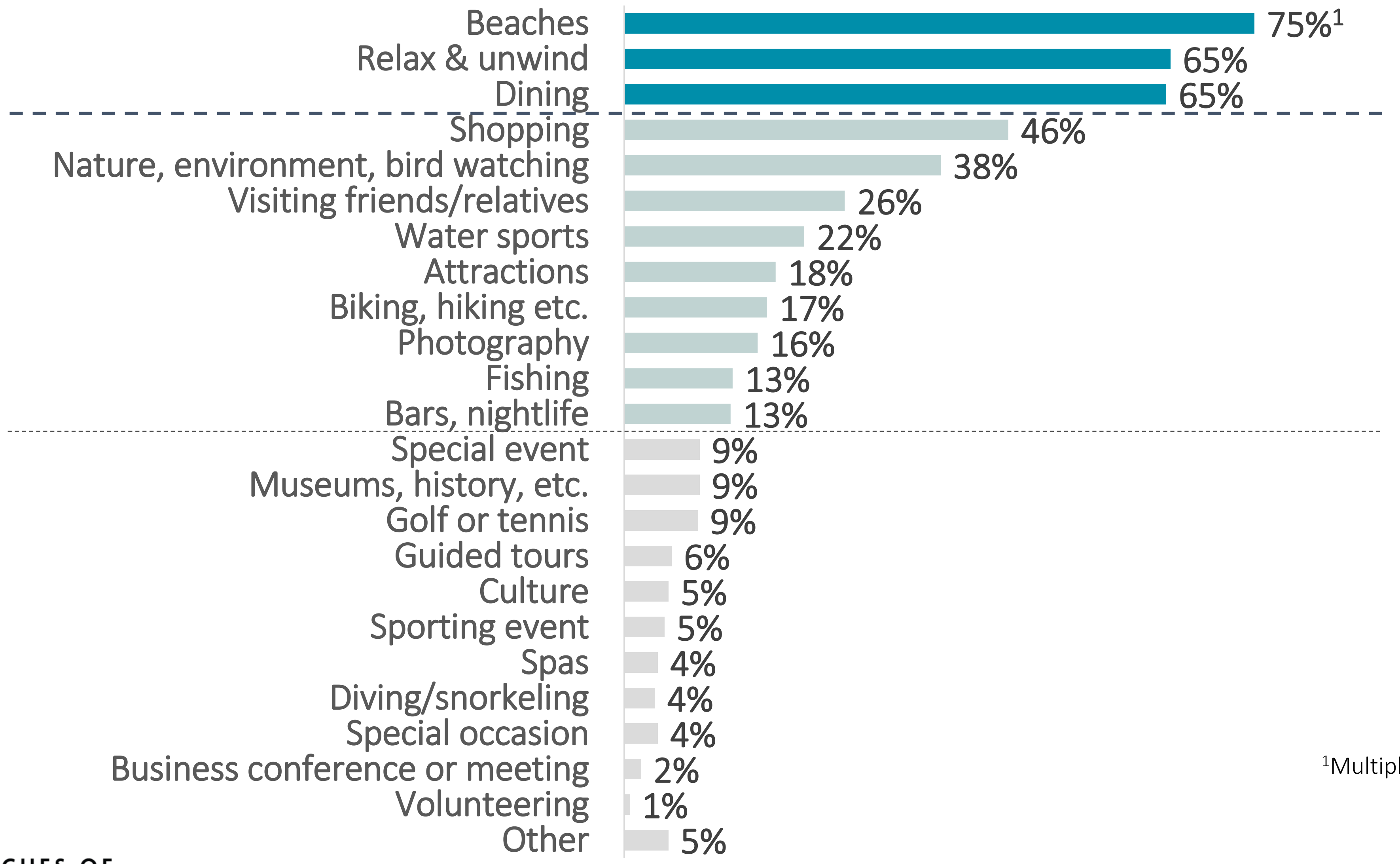
[2]When including extended stay visitors, average nights stayed for visitors staying in paid accommodations was 6.9 nights. Source: Visitor Tracking Survey

First Time and Experienced Visitors

First Time vs. Repeat Visitors
29% of visitors had made 11+ visits, while 30% were visiting for the first time.



Visitor Activities

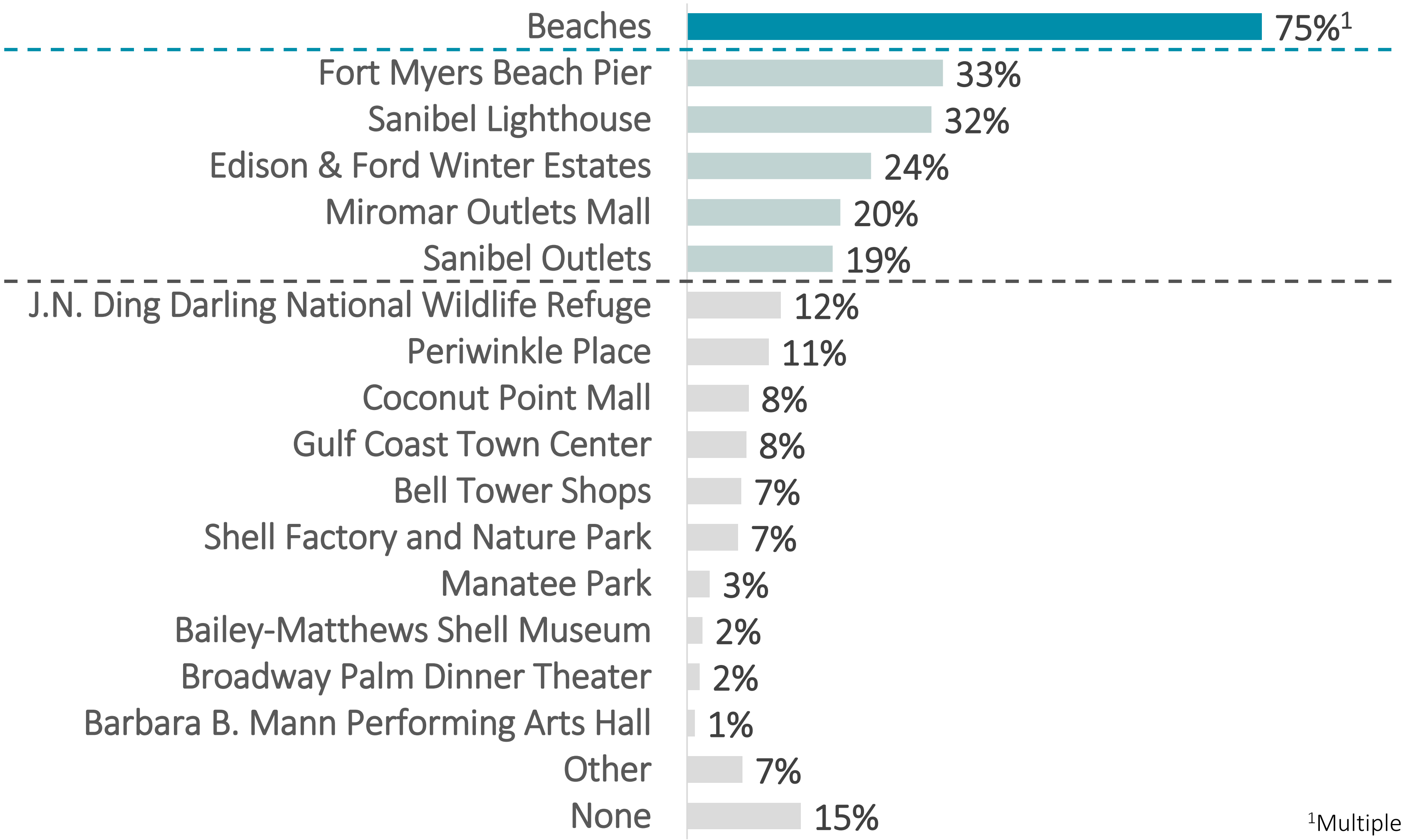


[1]Multiple responses permitted.

Reason for Visiting vs. Visitor Activities

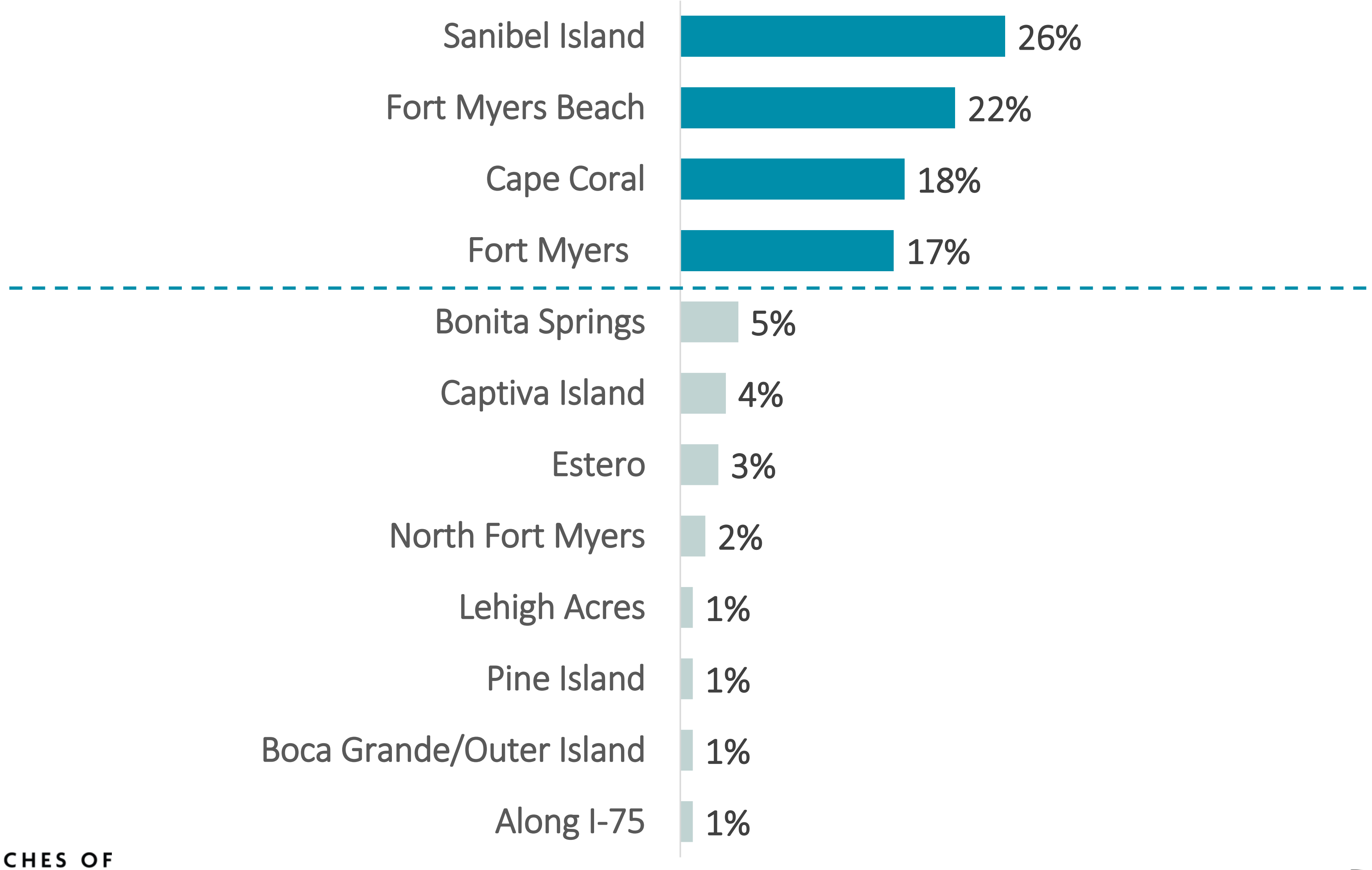
[1]Three responses permitted.
[2]Multiple responses permitted.

Attractions Visited



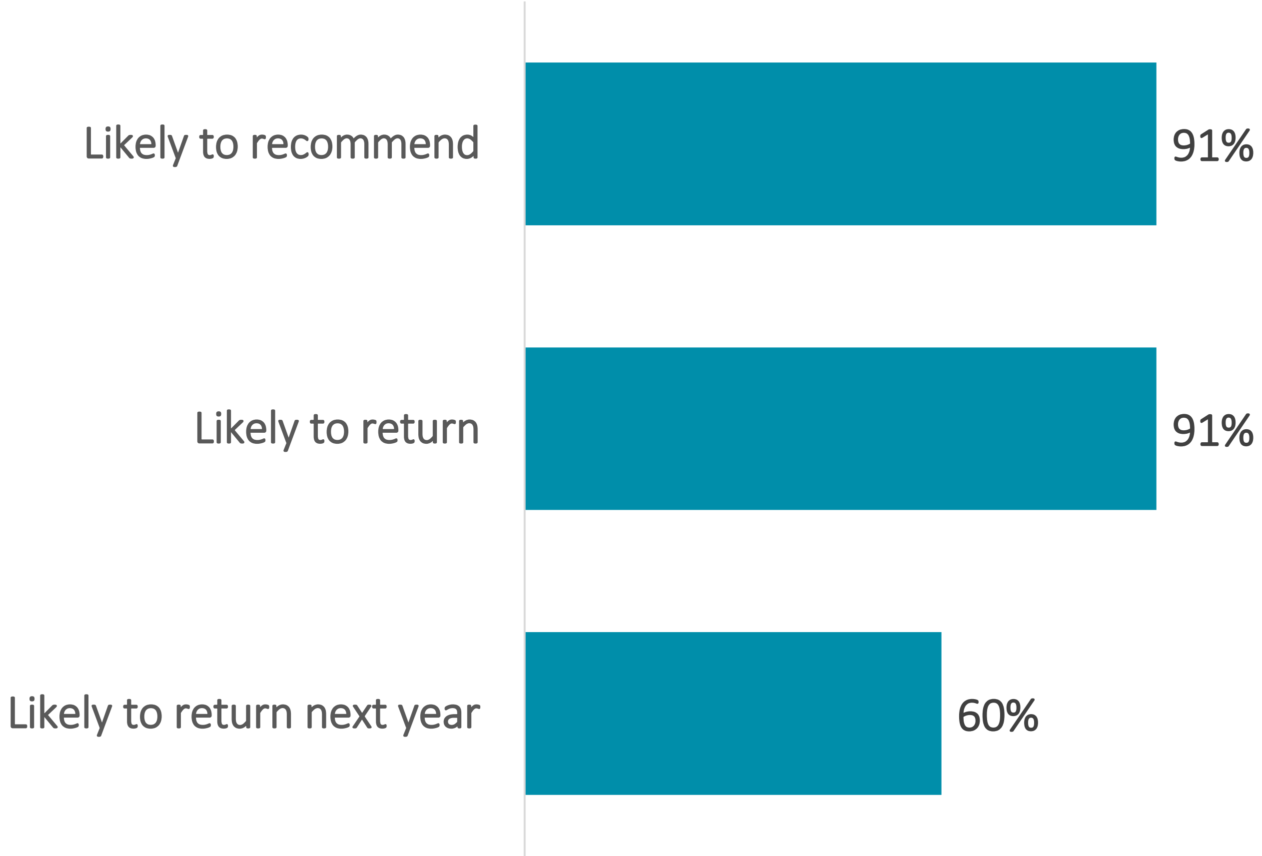
[1]Multiple responses permitted.

Community Stayed



Visitor Journey: Post-Trip Evaluation

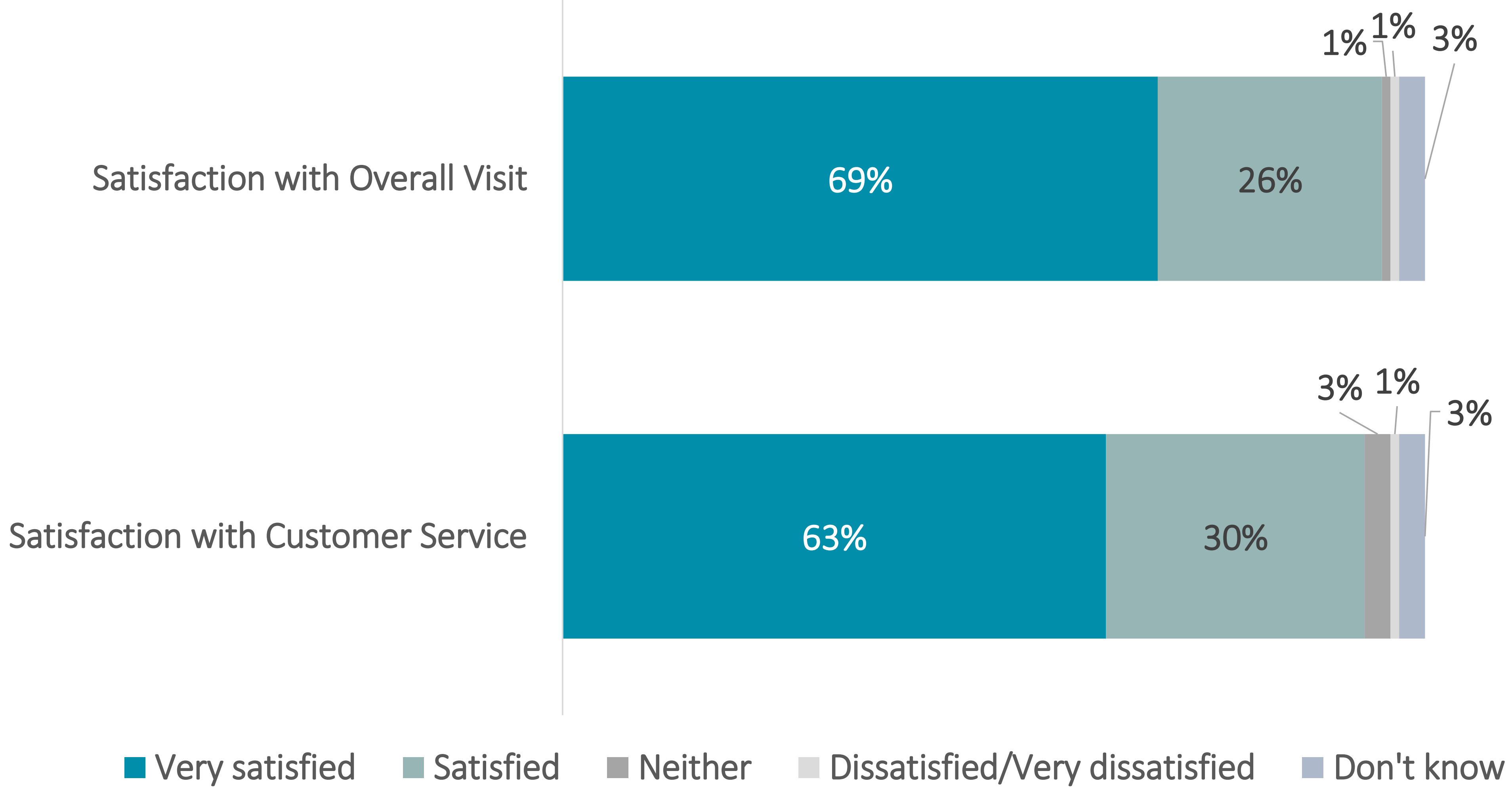
Satisfaction



Satisfaction Ratings

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2018	2019	2018	2019	2018	2019	2018	2019
Likely to Recommend	78%	88%	83%	92%	81%	90%	91%	96%
Likely to Return	71%	82%	90%	93%	87%	92%	81%	85%
Likely to Return Next Year	39%	44%	55%	67%	53%	62%	53%	51%

Satisfaction



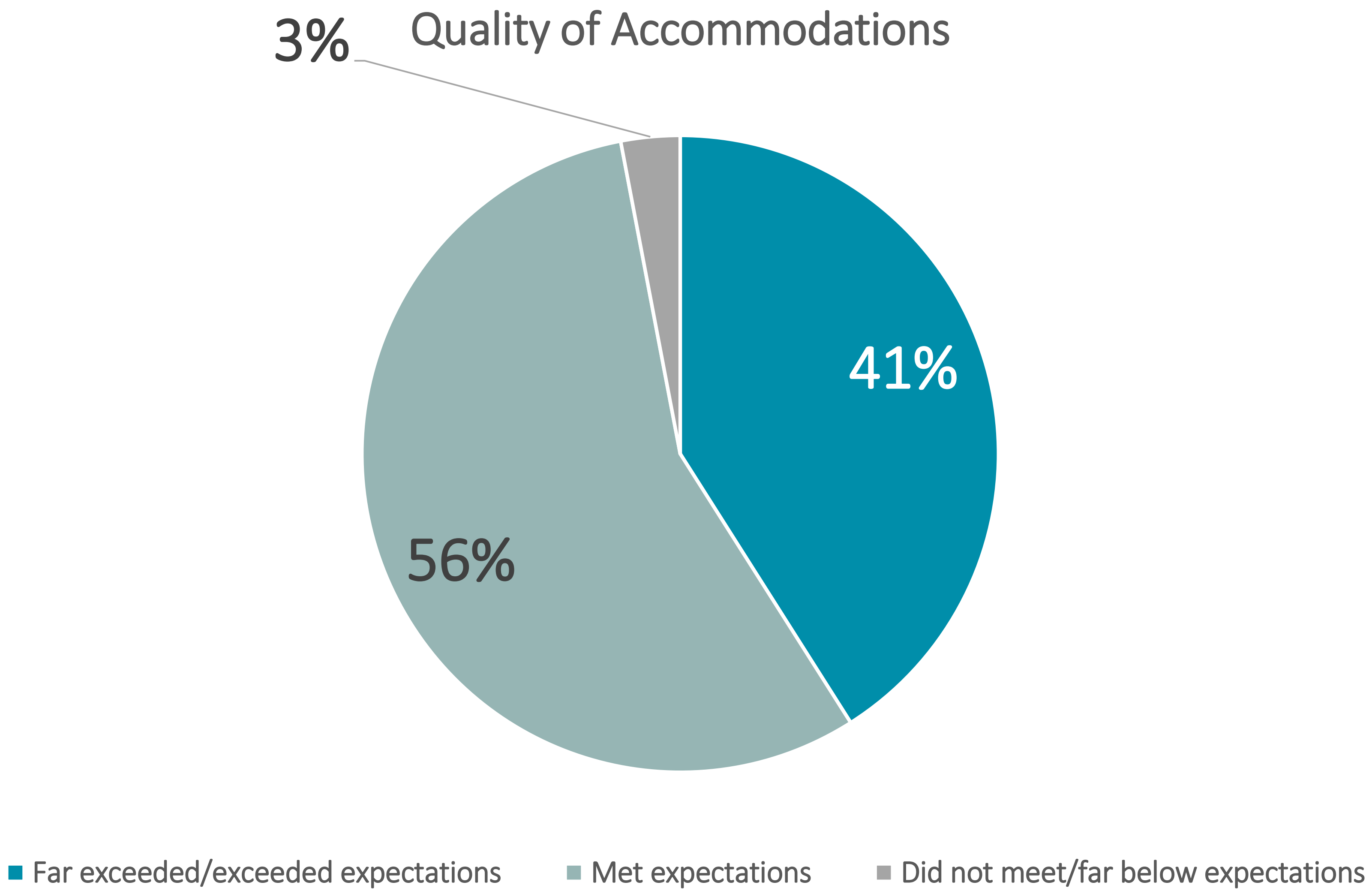
Satisfaction Ratings: Overall Visit

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2018	2019	2018	2019	2018	2019	2018	2019
Very Satisfied	52%	65%	65%	72%	59%	70%	57%	69%
Satisfied	42%	29%	30%	20%	36%	23%	39%	26%

Satisfaction Ratings: Customer Service

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2018	2019	2018	2019	2018	2019	2018	2019
Very Satisfied	34%	63%	39%	62%	38%	63%	39%	62%
Satisfied	50%	30%	48%	30%	49%	30%	47%	30%

Satisfaction Ratings: Quality of Accommodations

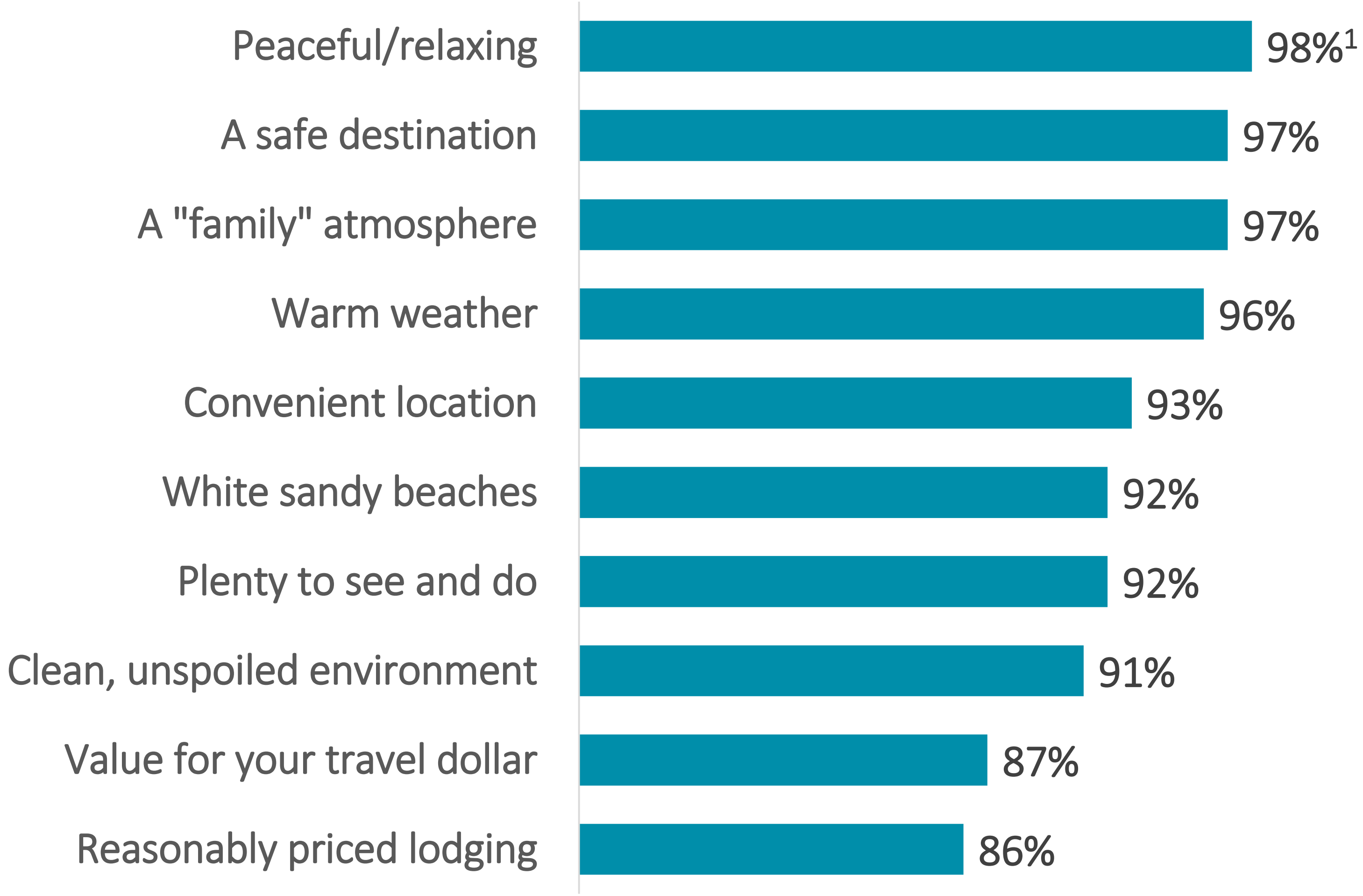


Satisfaction Ratings: Quality of Accommodations

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2018	2019	2018	2019	2018	2019	2018	2019
Exceeded Expectations	44%	40%	40%	42%	40%	41%	44%	43%
Met Expectations	53%	56%	54%	55%	54%	57%	51%	56%
Did Not Meet Expectations	2%	4%	2%	3%	2%	2%	0%	1%

Attribute Ratings

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



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

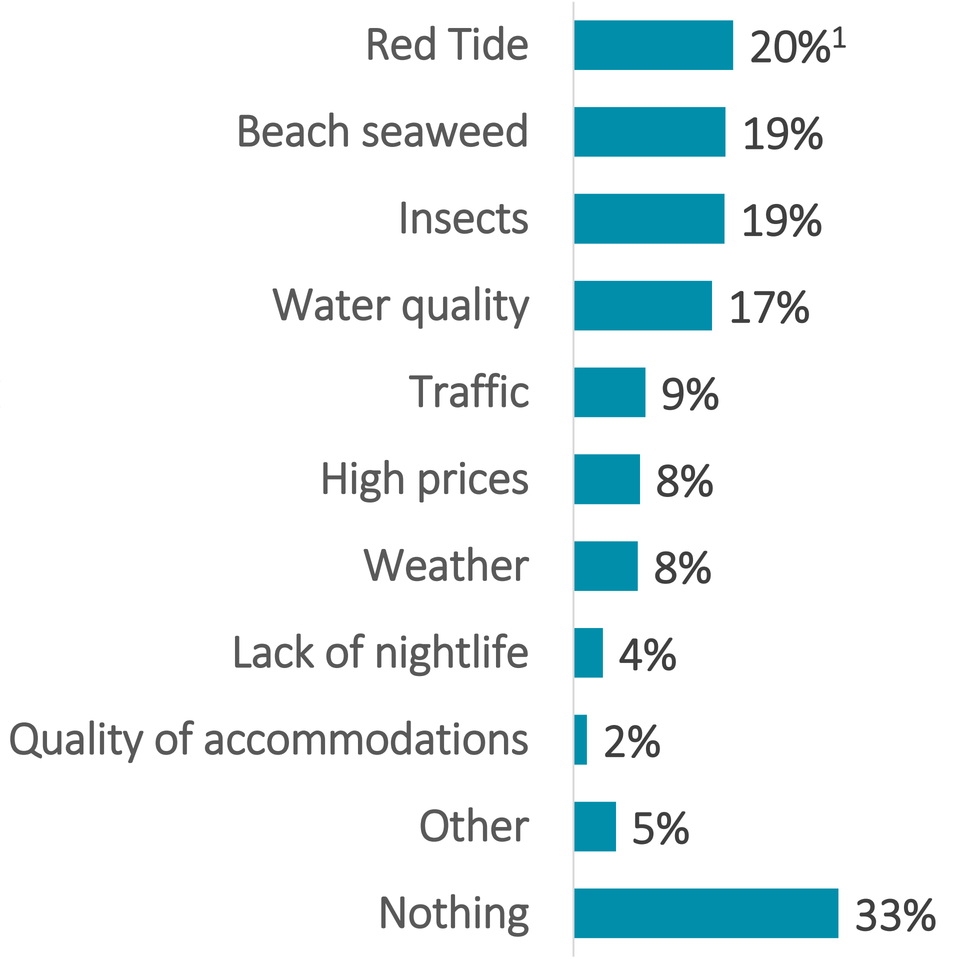
Vacation Attribute Influence vs. Ratings

Vacation Influencers[1]	Attribute	Fort Myers/Sanibel Ratings[2]
86%	Peaceful/relaxing	98%
82%	A safe destination	97%
80%	White sandy beaches	92%
78%	Warm weather	96%
78%	Clean, unspoiled environment	91%
75%	Convenient location	93%
72%	Plenty to see and do	92%
71%	A "family" atmosphere	97%
67%	Reasonably priced lodging	86%
67%	Value for your travel dollar	87%

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

Visitor Concerns

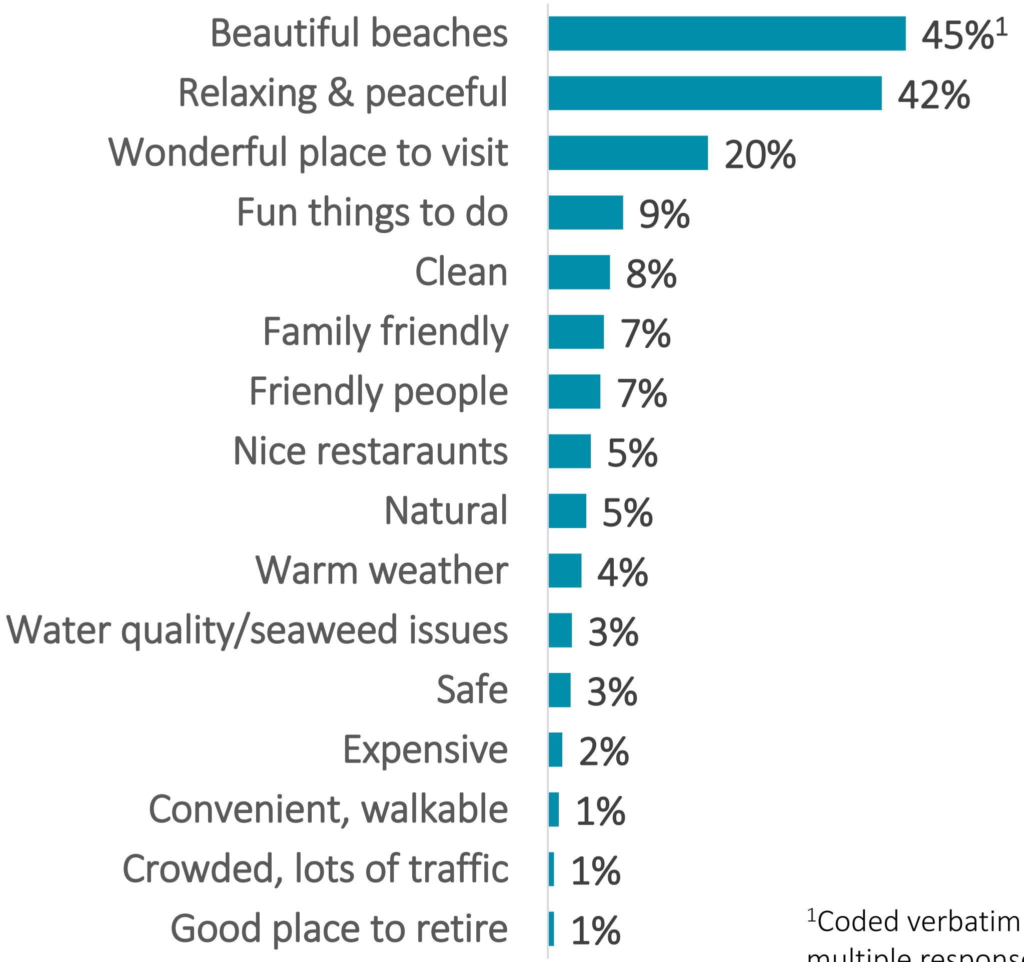
26% of visitors had at least one concern about the conditions of the beaches



[1]Multiple responses permitted.

Area Descriptions

Visitors describe The Beaches of Fort Myers & Sanibel as having **beautiful beaches** and being **relaxing and peaceful**.



[1]Coded verbatim responses; multiple responses permitted.

Area Descriptions

Beautiful Beaches

- “Beautiful with white sand, clean water and beaches.”
- “Beautiful place, nice relaxed atmosphere, friendly and clean. Nice beaches.”
- “Beautiful beaches with great shelling! Friendly atmosphere with happy people.”
- “Love the natural beaches, not extremely crowded, lots of shells, very relaxing.”

Relaxing & Peaceful

- “Nice a place to relax, beautiful water and friendly people.”
- “Very laid back, great beach, shelling, sea creatures. Soul renewing!”
- “Very peaceful and relaxing atmosphere where one can unwind and chill out.”
- “Very tranquil and relaxing. Sanibel is like going to a tropical island and not having to leave the USA.”

Area Descriptions

Wonderful place to visit

- "The perfect vacation destination for relaxing on the beach, enjoying a shaded bike ride, and seeing some of the few truly preserved natural habitats for wildlife."
- "Wonderful beaches that were not crowded. Good restaurants. Family friendly."
- "Fantastic! The best place in the world."

Fun things to do

- "A vibrant growing area with plenty of attractions and quality restaurants to make for a memorable stay."
- "A little bit of everything, always a great place to visit and great theater."
- "Very accommodating with lots of different things to do."
- "Lots to do – outdoor paradise."

Occupancy Barometer: October – December Reservations

Oct – Dec Reservations	July – Sept 2018	July – Sept 2019
Up	17%	40%
Same	17%	34%
Down	62%	25%
Not Sure	4%	1%

Occupancy Barometer: January – March Reservations

Jan – Mar Reservations	July – Sept 2018	July – Sept 2019
Up	25%	36%
Same	27%	44%
Down	36%	13%
Not Sure	12%	8%

Quarterly Comparisons

Economic Impact

Visitor & Lodging Statistics	July – Sept 2018	July – Sept 2019	% Change
Visitors	981,760	1,102,500	+12.3%
Room Nights	907,150	975,200	+7.5%
Direct Expenditures	$485,177,600	$548,970,200	+13.1%
Total Economic Impact	$787,928,400	$891,527,600	+13.1%
Occupancy	44.6%	45.6%	+2.2%
ADR	$116.60	$122.54	+5.1%
RevPAR	$52.00	$55.93	+7.6%

Jobs, Wages and Taxes Supported by Tourism

	July – Sept 2018	July – Sept 2019	% Change
Direct Jobs	6,617	7,378	+11.5%
Total Jobs	9,226	10,317	+11.8%
Direct Wages	$148,800,000	$165,493,000	+11.2%
Total Wages	$242,300,000	$276,479,600	+14.1%
Direct Local Taxes	$14,500,000	$16,743,600	+15.5%
Total Local Taxes	$27,100,000	$30,133,600	+11.2%
Direct State Taxes	$35,100,000	$39,031,800	+11.2%
Total State Taxes	$52,100,000	$58,395,100	+12.1%

Visitor Type

Visitor Type	July – Sept 2018	July – Sept 2019
Visitors in Paid Accommodations	65%	66%
Visitors in Non-Paid Accommodations	35%	31%
Day Trippers	NA	3%

Pre-Visit

Planned trip in advance	July – Sept 2018	July – Sept 2019
1 week or less	4%	8%
2-4 weeks	4%	11%
1-2 months	24%	25%
3-6 months	32%	28%
6 months or more	27%	24%
Not sure	9%	4%

Considered Other Destinations	July – Sept 2018	July – Sept 2019
Yes	17%	16%
No	83%	84%

Pre-Visit

Trip Planning Websites[1]	July – Sept 2018	July – Sept 2019
Airline websites	37%	34%
Search engines	23%	20%
Hotel websites	25%	20%
Booking websites	22%	18%
Trip Advisor	20%	17%
Airbnb, VRBO, HomeAway	12%	15%
Vacation rental websites	15%	11%
www.FortMyers-Sanibel.com	10%	7%
Facebook	8%	7%
VCB Social Media	NA	7%
Visit Florida	8%	6%
Travel reviews, blogs, stories, etc.	NA	5%
Instagram	NA	4%
YouTube, Hulu, Pandora	NA	3%
Other	10%	9%
None/Don't visit websites	17%	20%

[1]Multiple responses permitted.

Pre-Visit

Information Requests[1]	July – Sept 2018	July – Sept 2019
Call hotel/motel/condo	5%	8%
Visitor guide	2%	3%
Call VCB	1%	2%
Call local Chamber of Commerce	1%	2%
Fort Myers-Sanibel E-newsletter	2%	2%
Other	6%	5%
None/Did not request info	83%	82%

[1]Multiple responses permitted.

Pre-Visit

Recall of Lee County Promotions	July – Sept 2018	July – Sept 2019
Yes	41%	31%
No	50%	55%
Can't recall	19%	14%

Characteristics influencing decision to visit Lee County (top 2 boxes)	July – Sept 2018	July – Sept 2019
Peaceful/relaxing	80%	86%
A safe destination	74%	82%
White sandy beaches	77%	80%
Warm weather	75%	78%
Clean, unspoiled	70%	78%
Convenient location	67%	75%
Plenty to see and do	60%	72%
A "family" atmosphere	60%	71%
Value for your travel dollar	54%	67%
Reasonably priced lodging	54%	67%

Pre-Visit

Transportation	July – Sept 2018	July – Sept 2019
Fly	65%	60%
Drive a personal vehicle	30%	35%
Drive a rental vehicle	3%	3%
Drive a RV	1%	1%
Travel by bus	0%	0%
Other	1%	1%

Airport Used	July – Sept 2018	July – Sept 2019
Southwest Florida International	66%	66%
Punta Gorda	11%	10%
Miami International	8%	9%
Tampa International	3%	6%
Orlando International	5%	5%
Ft. Lauderdale International	5%	3%
Other	2%	1%

Travel Party Profile

Visitor Origin	July – Sept 2018	July – Sept 2019
Florida	20%	17%
Southeast	19%	13%
Northeast	16%	18%
Midwest	27%	31%
West	3%	5%
Canada	1%	2%
United Kingdom	3%	3%
Germany	6%	5%
Other Europe	2%	3%
Other international	3%	3%

Visitor Origin	July – Sept 2018	July – Sept 2019
New York City	7%	6%
Miami-Ft. Lauderdale	6%	6%
Chicago	5%	5%
Tampa-Clearwater-St. Petersburg	9%	4%
Cincinnati	4%	4%
Boston	5%	3%

Travel Party Profile

Travel Parties	July – Sept 2018	July – Sept 2019
Mean travel party size	3.4	3.5[1]
Travel with children under age 18	35%	36%

Travel Party Composition	July – Sept 2018	July – Sept 2019
Family	44%	47%
Couple	36%	33%
Single	11%	12%
Group of couples/friends	9%	7%
With business associates	0%	1%
In a tour group	0%	<1%

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

Travel Party Profile

Marital Status	July – Sept 2018	July – Sept 2019
Married	72%	72%
Single	14%	25%
Other	9%	3%

Age	July – Sept 2018	July – Sept 2019
Average age	49	50

Household Income	July – Sept 2018	July – Sept 2019
Median Income	$105,050	100,000

Trip Experience

Length of Stay	July – Sept 2018	July – Sept 2019
Average nights in The Beaches of Fort Myers & Sanibel	8.3	7.7

First time/Repeat Visitors	July – Sept 2018	July – Sept 2019
First-time	19%	29%
Repeat	81%	70%

Trip Experience

Activities[1]	July – Sept 2018	July – Sept 2019
Beaches	87%	75%
Relax & unwind	62%	65%
Dining	68%	65%
Shopping	55%	46%
Nature, environment, bird watching	30%	38%
Visiting friends/relatives	27%	26%
Water sports	28%	22%
Attractions	22%	18%
Biking, hiking etc.	19%	17%
Photography	14%	16%
Fishing	11%	13%
Bars, nightlife	14%	13%
Special event	NA	9%
Museums, history, etc.	NA	9%
Golf or tennis	14%	9%
Guided tours	5%	6%
Culture	4%	5%
Sporting event	10%	5%
Spas	NA	4%
Diving/snorkeling	3%	4%
Special occasion	NA	3%
Business conference or meeting	NA	2%
Volunteering	NA	1%
Other	2%	5%

[1]Multiple responses permitted.

Trip Experience

Attractions[1]	July – Sept 2018	July – Sept 2019
Beaches	80%	75%
Fort Myers Beach Pier	36%	33%
Sanibel Lighthouse	28%	32%
Edison & Ford Winter Estates	18%	24%
Miromar Outlets Mall	34%	20%
Sanibel Outlets	24%	19%
J.N. Ding Darling National Wildlife Refuge	9%	12%
Periwinkle Place	10%	11%
Coconut Point Mall	10%	8%
Gulf Coast Town Center	11%	8%
Bell Tower Shops	11%	7%
Shell Factory and Nature Park	6%	7%
Manatee Park	3%	3%
Bailey-Matthews Shell Museum	2%	2%
Broadway Palm Dinner Theater	1%	2%
Barbara B. Mann Performing Arts Hall	1%	1%
Other	4%	7%
None	9%	15%

[1]Multiple responses permitted.

Trip Experience

Area stayed	July – Sept 2018	July – Sept 2019
Sanibel Island	23%	26%
Fort Myers Beach	19%	22%
Cape Coral	16%	18%
Fort Myers	21%	17%
Bonita Springs	4%	5%
Captiva Island	3%	4%
Estero	5%	3%
North Fort Myers	2%	2%
Lehigh Acres	1%	1%
Pine Island	1%	1%
Boca Grande/Outer Island	1%	1%
Along I-75	NA	1%

Post-Trip Evaluation

Loyalty metrics	July – Sept 2018	July – Sept 2019
Likely to recommend	82%	91%
Likely to return	86%	91%
Likely to return next year	52%	60%

Satisfaction with Accommodations	July – Sept 2018	July – Sept 2019
Exceeded expectations	42%	41%
Met expectations	56%	56%
Did not meet expectations	2%	3%

Post-Trip Evaluation

Satisfaction with Visit	July – Sept 2018	July – Sept 2019
Very satisfied	46%	69%
Satisfied	43%	26%
Neither	2%	1%
Dissatisfied/Very dissatisfied	2%	1%
Don't know	7%	3%

Satisfaction with Customer Service	July – Sept 2018	July – Sept 2019
Very satisfied	38%	63%
Satisfied	49%	30%
Neither	3%	3%
Dissatisfied/Very dissatisfied	1%	1%
Don't know	9%	3%

Post-Trip Evaluation

Visitor Concerns[1]	July – Sept 2018	July – Sept 2019
Red Tide	44%	20%
Beach seaweed	19%	19%
Insects	13%	19%
Water quality	29%	17%
Traffic	9%	9%
High prices	7%	8%
Weather	10%	8%
Lack of nightlife	5%	4%
Quality of accommodations	3%	2%
Other	4%	5%
Nothing	24%	33%

[1]Multiple responses permitted.

Methodology

Methodology

- Visitor Tracking Study
  - Internet survey[1] & in-person interviews in public areas, hotels, & at events around Lee County
  - Sample size: 1,074 completed interviews
  - Target individuals: July – Sept visitors to Lee County
  - Data Collection: July 2019 – September 2019

- Occupancy Study
  - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc., and the STR Report
  - Sample Size – data from 6,896 hotel/rental/campground units (57 properties) reporting to DSG and 9,767 hotel units reporting to STR (81 properties)

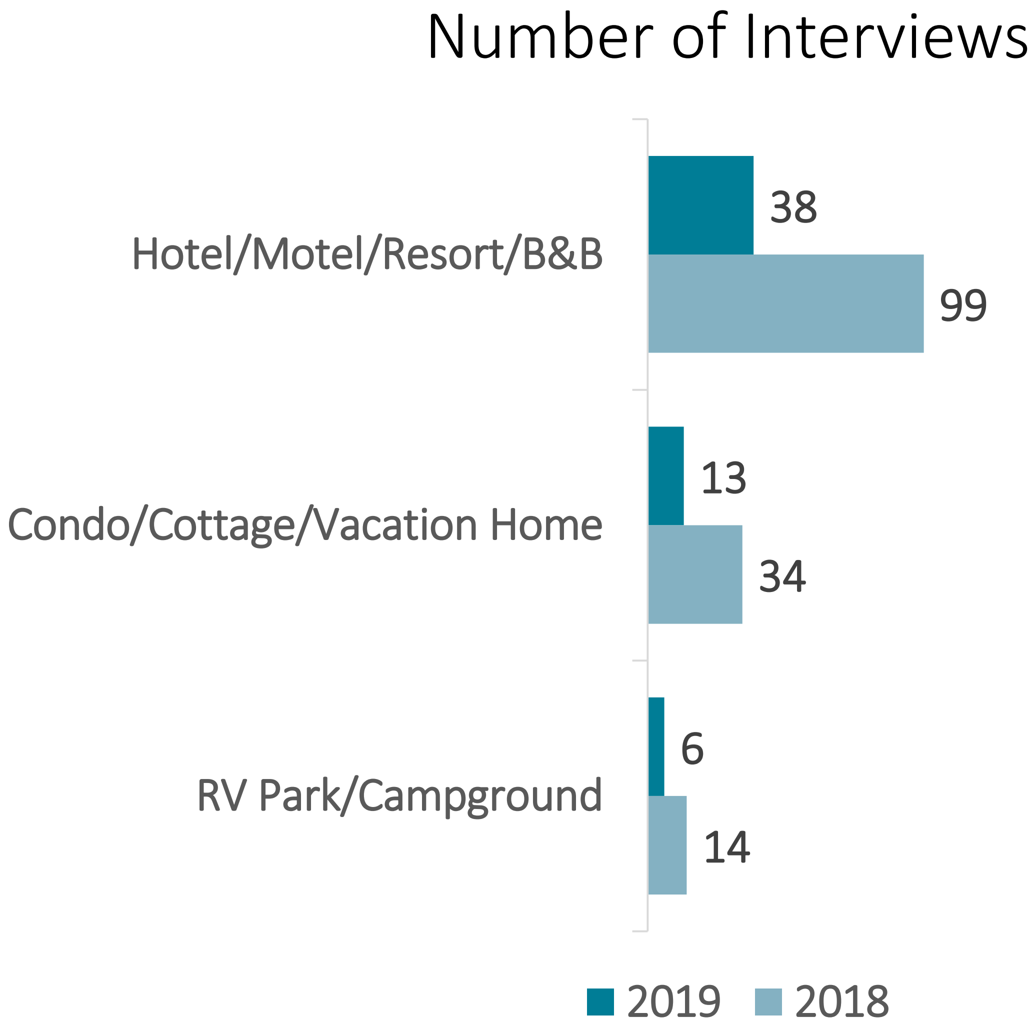
[1]166 internet surveys were completed by visitors to Sanibel Moorings Resort and Sundial Beach Resort & Spa.

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: 1,074 completed interviews
    - Target individuals: July – Sept visitors to Lee County
    - Data Collection: July 2019 – September 2019
  - Occupancy Study
    - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc., and the STR Report
    - Sample Size – data from 6,896 hotel/rental/campground units (57 properties) reporting to DSG, and 9,767 hotel units reporting to STR (81 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 – 57 completed interviews
    - Data Collection: October 2019 (for July – Sept 2019)
  - Total Sample Size – data from 6,896 hotel/rental/campground units reporting to DSG and 9,767 hotel units reporting to STR (representing 81 properties)



Methodology

- **1,074** visitor interviews were completed in the following areas:

277	Fort Myers Beach: The Pier, Times Square, Outrigger Beach Resort, Tarpon Lodge (Pine Island)
385	Fort Myers: Centennial Park, RSW, Edison-Ford Winter Estates, Hampton Inn & Suites Fort Myers, The Shell Factory and Nature Park
221	Sanibel: Lighthouse Beach, Castaways Cottages, Beachview Cottages, West Wind Inn, Tween Waters, Sanibel Moorings Resort, Sundial Beach Resort & Spa
140	Cape Coral/North Fort Myers: Yacht Club Community Park, The Shell Factory, North Fort Myers
51	Bonita Springs: Bonita Beach, Estero

The Beaches of Fort Myers & Sanibel

Lee County VCB

July – Sept 2019
Visitor Tracking & Occupancy Study

Tamara Pigott, CDME
Executive Director

Phillip Downs, Ph.D.
Joseph St. Germain, Ph.D.
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THE BEACHES OF FORT MYERS AND SANIBEL

downs & st. germain RESEARCH