The Beaches of Fort Myers & Sanibel

Lee County VCB

July – September 2021

Visitor Tracking, Occupancy & Economic Impact Study

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THE BEACHES OF FORT MYERS AND SANIBEL

downs & st. germain RESEARCH

Introduction

STUDY OBJECTIVES: MAP THE VISITOR JOURNEY

Pre-Visit

- Planning cycle
- Planning sources
- Information requests
- Other destinations considered
- Trip influencers
- Reasons for visiting
- Exposure to promotions
- Booking
- Mode of transportation

Travel Party Profile

- Visitor origin
- Party size
- Party composition
- Demographics

Trip Experience

- Accommodations
- Length of stay
- Number of times in destination
- Activities in destination
- Attractions visited
- Area stayed

Post-Trip Evaluation

- Likelihood of recommending
- Likelihood of returning
- Satisfaction with overall stay & customer service
- Evaluation of destination attributes
- Visitor concerns
- Painting a picture for others

Economic Impact on Destination

- Number of visitors
- Expenditures
- Economic impact
- Room nights generated
- Occupancy, ADR, RevPAR
- Jobs, wages and taxes supported by tourism

Executive Summary

QUARTERLY SNAPSHOT

- Tourism is booming, with all economic impact metrics **exceeding pre-pandemic levels**
- More visitors **traveled as a family** to The Beaches of Ft. Myers and Sanibel this quarter compared to 2020
- More July – September 2021 visitors flew to the Beaches of Fort Myers and Sanibel via **RSW**
- July – September 2021 visitors were more likely to stay in **paid accommodations**
- July – September 2021 visitors **stayed longer**

55.8%	$139.36	$77.76
OCCUPANCY RATE	AVERAGE DAILY RATE	REVENUE PER ROOM
↑ 22.4% from 2019	↑ 13.7% from 2019	↑ 39.1% from 2019

THE BEACHES OF FORT MYERS AND SANIBEL

downs & st. germain RESEARCH

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

TOURISM SNAPSHOT: KEY METRICS JULY – SEPTEMBER 2020 VS. 2021

Visitor & Lodging Statistics	July -Sept 2020	July – Sept 2021	% Change '20-'21
Visitors	752,400	1,162,800	+54.5%
Room Nights	846,900	1,294,000	+52.8%
Direct Expenditures[1]	$500,650,800	$767,613,500	+53.3%
Total Economic Impact[2]	$813,056,900	$1,223,575,900	+50.5%

[1]Includes: accommodations, restaurants, entertainment, shopping, transportation, groceries, and "other" expenses.
[2]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
[3]As of January 2021, the IMPLAN multiplier used to estimate economic impact is 1.594.

TOURISM SNAPSHOT: KEY METRICS JULY – SEPTEMBER 2019 VS. 2021

Visitor & Lodging Statistics	July – Sept 2019	July – Sept 2021	% Change '19-'21
Visitors	1,102,500	1,162,800	+5.5%[1]
Room Nights	975,200	1,294,000	+32.7%[1]
Direct Expenditures[2]	$548,970,200	$767,613,500	+39.8%[1]
Total Economic Impact[3]	$891,527,600	$1,223,575,900	+37.2%[4]

[1]The year-over-year increase in room nights and visitor spending is higher than the increase in the number of visitors due to the increase in the percentage of visitors staying in paid accommodations and their longer length of stay in July – September 2021, increased number of rental units available in 2021, and increased visitor spending in 2021 on almost every category of spending, e.g., accommodations, restaurants, shopping, etc.

[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.

[4]As of January 2021, the IMPLAN multiplier used to estimate economic impact is 1.594.

TOURISM SNAPSHOT: KEY METRICS FOR THE CALENDAR YEAR

Visitor & Lodging Statistics	CY 2019	CY 2020	CY 2021	% Change '19-'21
Visitors	3,676,900	2,293,900	3,385,900	-7.9%[1]
Room Nights	4,132,400	3,092,900	4,614,800	+11.7%[1]
Direct Expenditures[2]	$2,528,485,600	$1,987,832,500	$2,770,395,800	+9.6%[1]
Total Economic Impact[3]	$4,106,260,300	$3,228,240,000	$4,416,010,900	+7.5%[4]

[1]The year-over-year increase in room nights and visitor spending is higher than the increase in the number of visitors due to the increase in the percentage of visitors staying in paid accommodations and their longer length of stay, increased number of rental units available in 2021, and increased visitor spending in 2021 on almost every category of spending, e.g., accommodations, restaurants, shopping, etc.

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[4]As of January 2021, the IMPLAN multiplier used to estimate economic impact is 1.594.

July – September LODGING STATISTICS

55.8%	$139.36	$77.76
Occupancy	ADR	RevPAR
↑ 22.4%	↑ 13.7%	↑ 39.1%
From 2019	From 2019	From 2019

VISITOR JOURNEY: PRE-VISIT

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

TRIP PLANNING

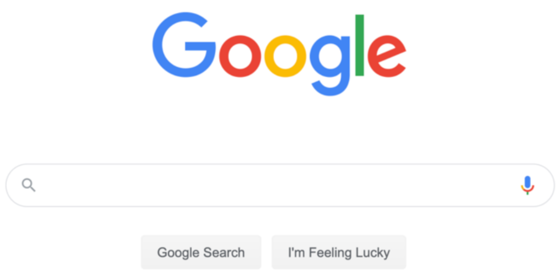
- Over **half** of visitors planned their trips to The Beaches of Fort Myers & Sanibel at least **3 months in advance**

- Nearly **2 in 5** visitors **requested information** from hotels, the VCB, etc., to plan their trips
  - **3 in 10 called a hotel/motel/condo** when planning their trips

- **Over 1 in 3** visitors considered choosing other destinations when planning their trips

TRIP PLANNING: WEBSITES/APPS USED

- Over 4 in 5 visitors used websites and apps to plan their trips to The Beaches of Fort Myers & Sanibel
- Top websites and apps used to plan their trips include[1]:



36% Search engines

30% Airbnb, VRBO, HomeAway

22% Airline websites/apps

20% Booking websites/apps

[1]Multiple responses permitted.

TOP TRIP INFLUENCERS

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

92% Peaceful/relaxing

91% A Safe Destination

88% Warm weather

[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]:

67% Vacation

62% Beach

43% Relax & unwind

16% Visit friends & relatives

[1]Three responses permitted.

PROMOTIONS

- 42% of visitors recalled promotions in the past 6 months for The Beaches of Fort Myers & Sanibel
- Top sources of recall include[1]:

46% Internet

38% Social media

22% Travel reviews/blogs

[1]Multiple responses permitted.

BOOKING

- Visitors used the following to **book their trips**:

42% Directly with hotel/condo

VRBO from HomeAway airbnb

29% VRBO, HomeAway, Airbnb

19% Online Travel Agencies

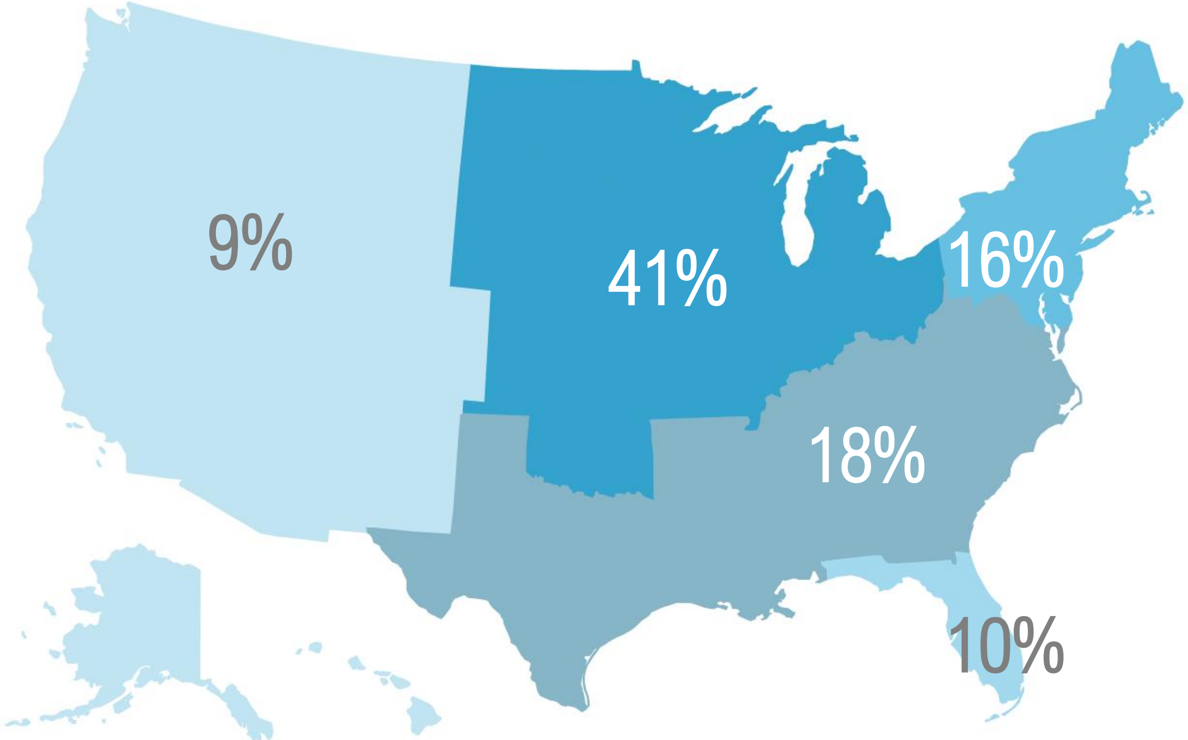
TRANSPORTATION

- 75% of visitors flew to The Beaches of Fort Myers & Sanibel
- 64% of all visitors traveled to Ft. Myers via RSW

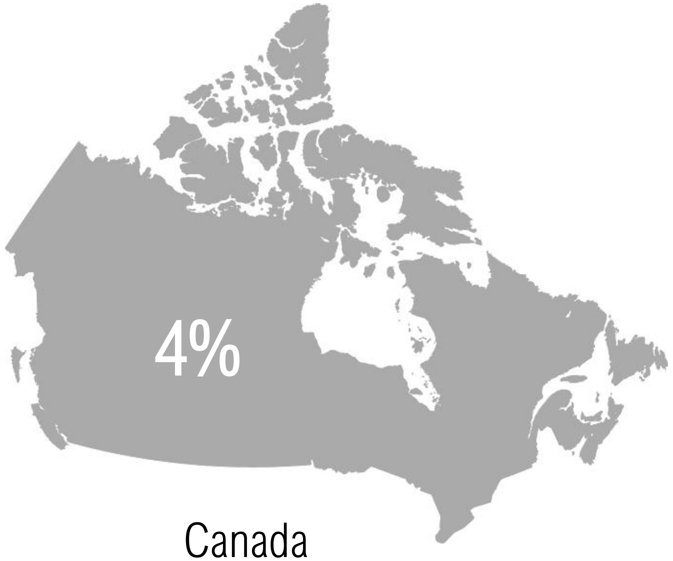
VISITOR JOURNEY: TRAVEL PARTY PROFILE

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

ORIGIN

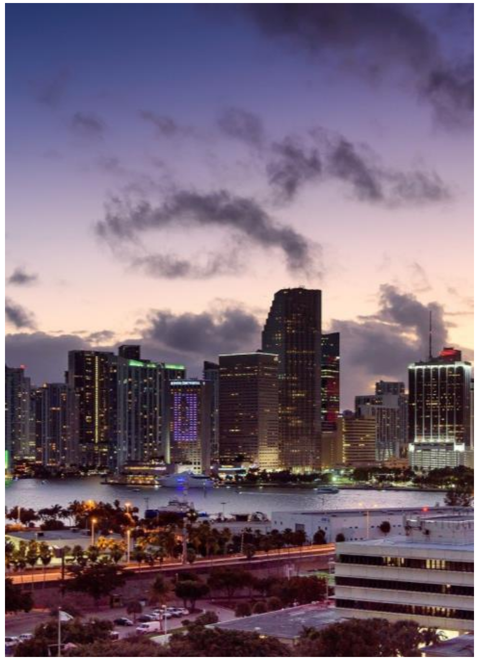


US = 94%



Canada

TOP ORIGIN MARKETS



7% Miami-Ft. Lauderdale

7% Chicago

7% New York City

5% Detroit

TRAVEL PARTY SIZE AND COMPOSITION

- Visitors traveled in a party composed of 3.8 people[1]
- 49% traveled with children under the age of 18
- 60% traveled as a family, while 26% of visitors traveled as a couple

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

DEMOGRAPHIC PROFILE

July – September Visitors:

- Average age of 49 years old
- Median household income of $106,300
- Married (72%)
- College educated (66%)
- Caucasian/white (78%)
- Slightly more likely to be female (55%)[1]

[1]May reflect females' willingness to be interviewed.

Visitor Journey: Trip Experience

Pre-Visit

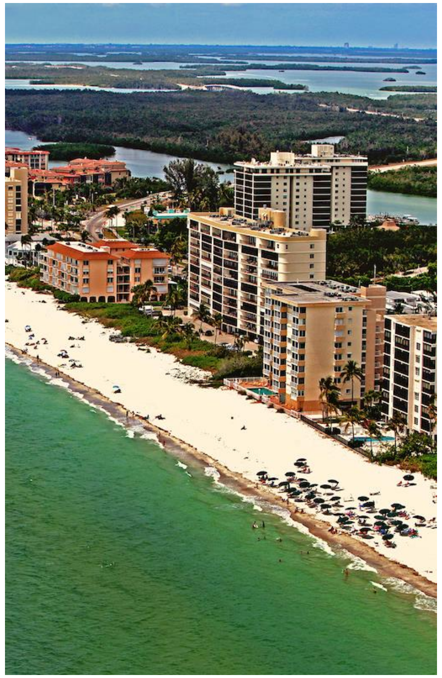
Travel Party Profile

Trip Experience

Post-Trip Evaluation

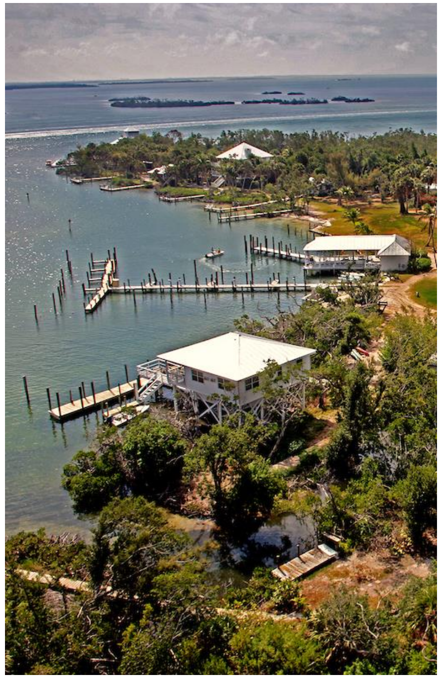
Economic Impact on Destination

ACCOMMODATIONS

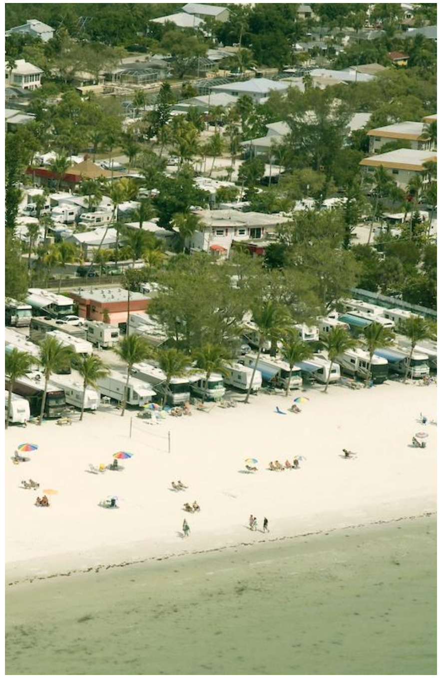


42% Condo/Vacation Rental

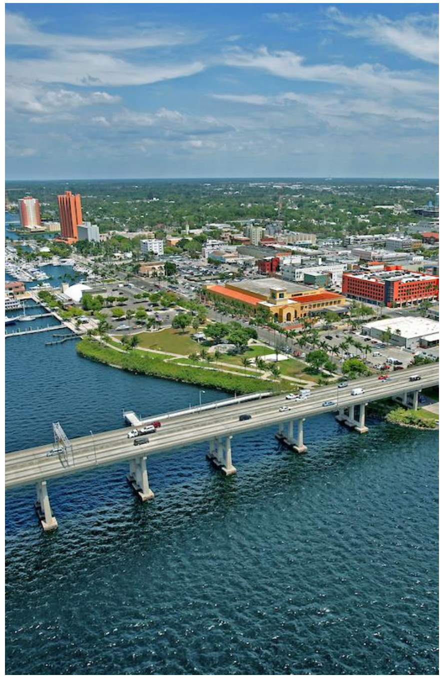
30% Hotel/Motel/Resort/B&B



24% Non-paid Accommodations



2% RV Park/Campground



2% Day trippers

LENGTH OF STAY & NUMBER OF TIMES IN DESTINATION

- Visitors[1] spent 6.4 nights in The Beaches of Fort Myers & Sanibel
- 40% were first time visitors
- 18% have visited more than 10 times

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

VISITOR ACTIVITIES

- Top visitor activities include[1]:

74% Beaches

74% Relax & unwind

57% Dining

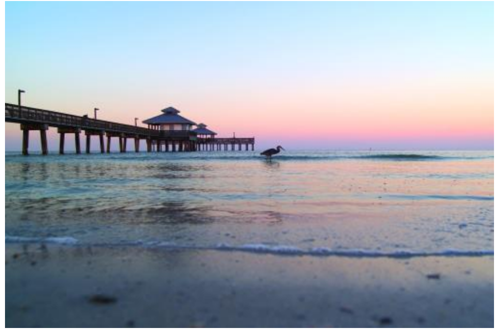
[1]Multiple responses permitted.

REASON FOR VISITING VS. VISITOR ACTIVITIES

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

TOP ATTRACTIONS VISITED[1]

74% Beaches



41% Fort Myers Beach Pier

31% Sanibel Lighthouse

[1]Multiple responses permitted.

TOP COMMUNITIES STAYED

34% Fort Myers Beach

27% Sanibel Island

13% Cape Coral

8% Fort Myers

VISITOR JOURNEY: POST-TRIP EVALUATION

SATISFACTION

- 96% of visitors are likely to recommend The Beaches of Fort Myers & Sanibel
- 89% of visitors are likely to return
- 53% of visitors are likely to return next year

SATISFACTION

- 97% of visitors were satisfied or very satisfied with their overall visit to The Beaches of Fort Myers & Sanibel (66% were very satisfied)
- 95% of visitors were satisfied or very satisfied with customer service on their visit (61% were very satisfied)
- 37% of visitors said paid accommodations exceeded their expectations (95% met or exceeded expectations)

TOP ATTRIBUTE RATINGS

→Visitors gave the highest ratings to the following destination attributes[1]:

97% Peaceful/relaxing

96% A safe destination

96% Warm weather

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

LEAST LIKED FEATURES[1]

- 1 in 4 visitors indicated insects and high prices were the least liked features of their visit

→ 1 in 6 visitors least liked the traffic and 1 in 7 least liked the beach seaweed

→ 31% of visitors had no concerns about the destination

[1]During this specific visit, which features have you liked LEAST about our area?

AREA DESCRIPTIONS

Beautiful Beaches

"A slice of paradise - beautiful, unspoiled, clean - absolutely wonderful!"

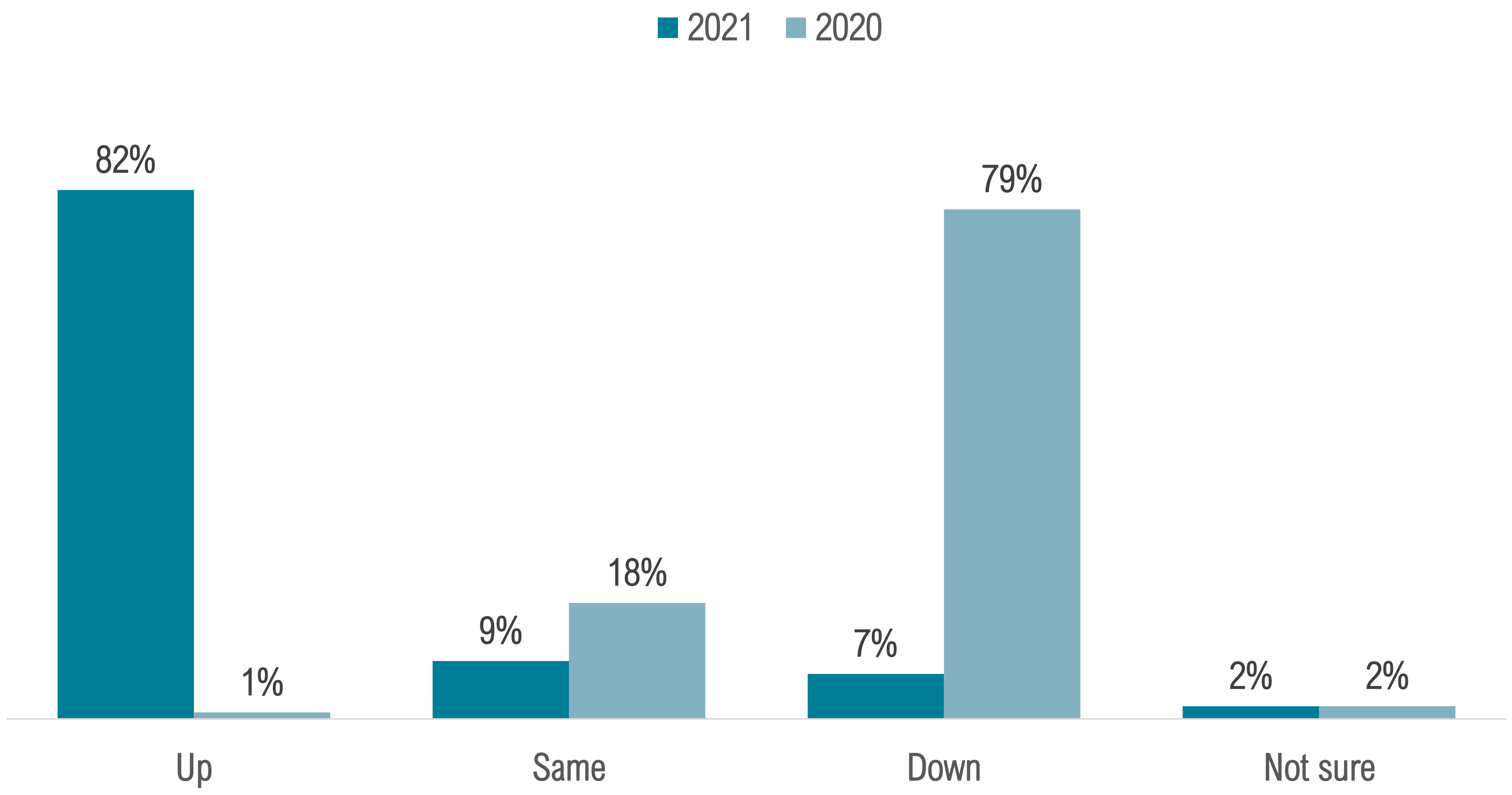
Wonderful Place to Visit

"I can't get to Hawaii but Sanibel is just as good!"

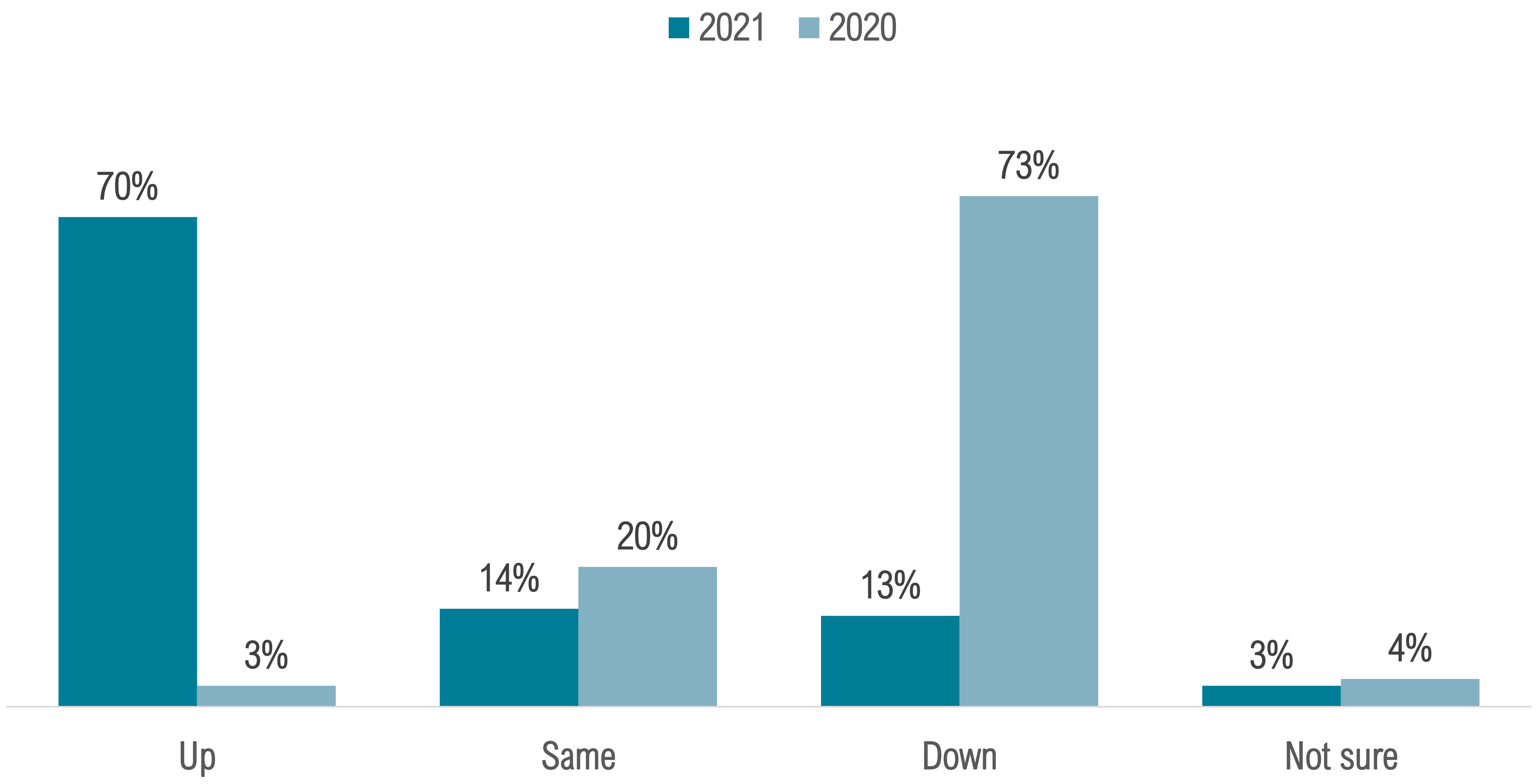
Relaxing & Peaceful

"Very laid back family atmosphere. Not at all commercialized. Calm and safe water for young swimmers."

OCCUPANCY BAROMETER: OCTOBER – DECEMBER RESERVATIONS



OCCUPANCY BAROMETER: JANUARY – MARCH RESERVATIONS



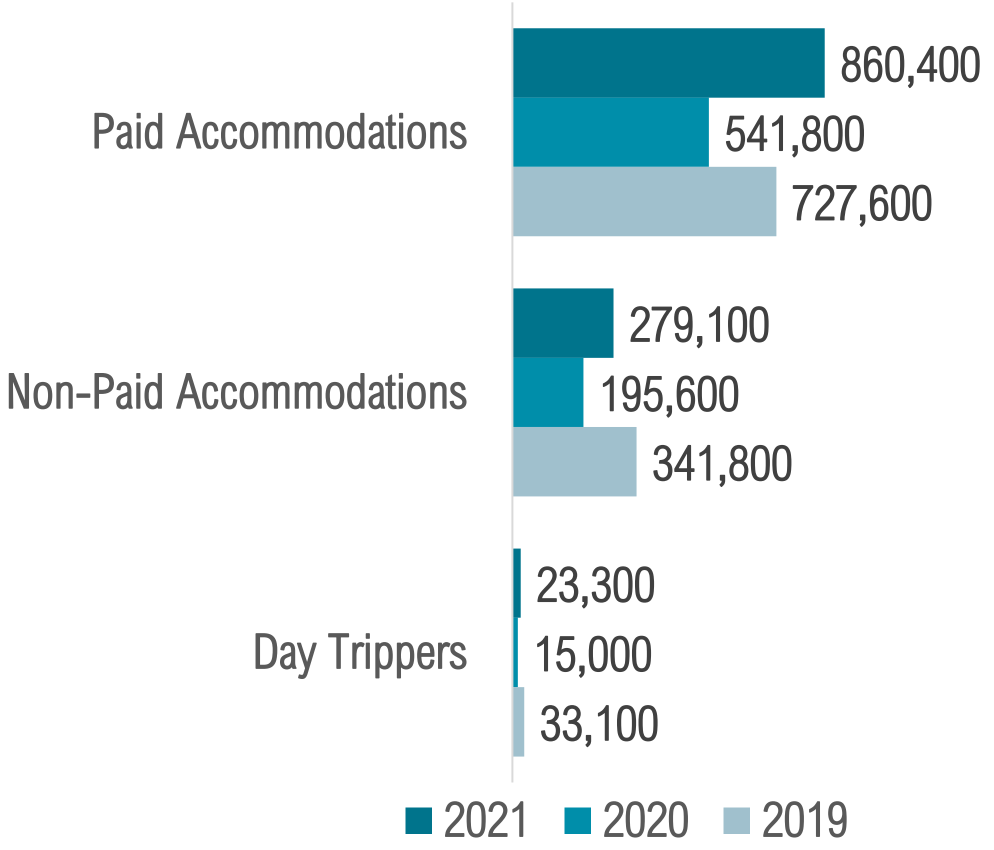
Detailed Findings

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

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

NUMBER OF VISITORS

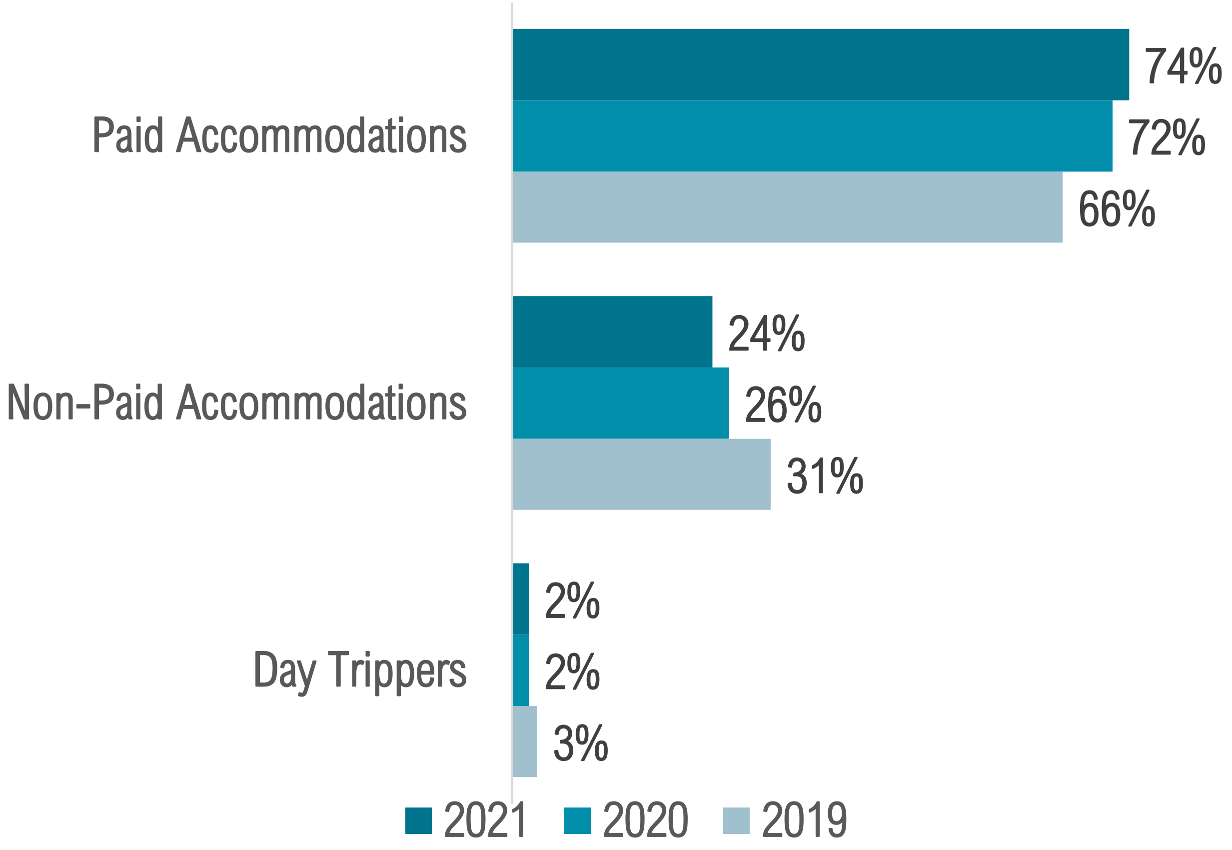
There were 1,162,800[1] visitors to The Beaches of Fort Myers & Sanibel in July – September 2021 (+5.5% from 2019 & +54.5% from 2020).



[1]Sources: Visitor Tracking Study & Occupancy Survey

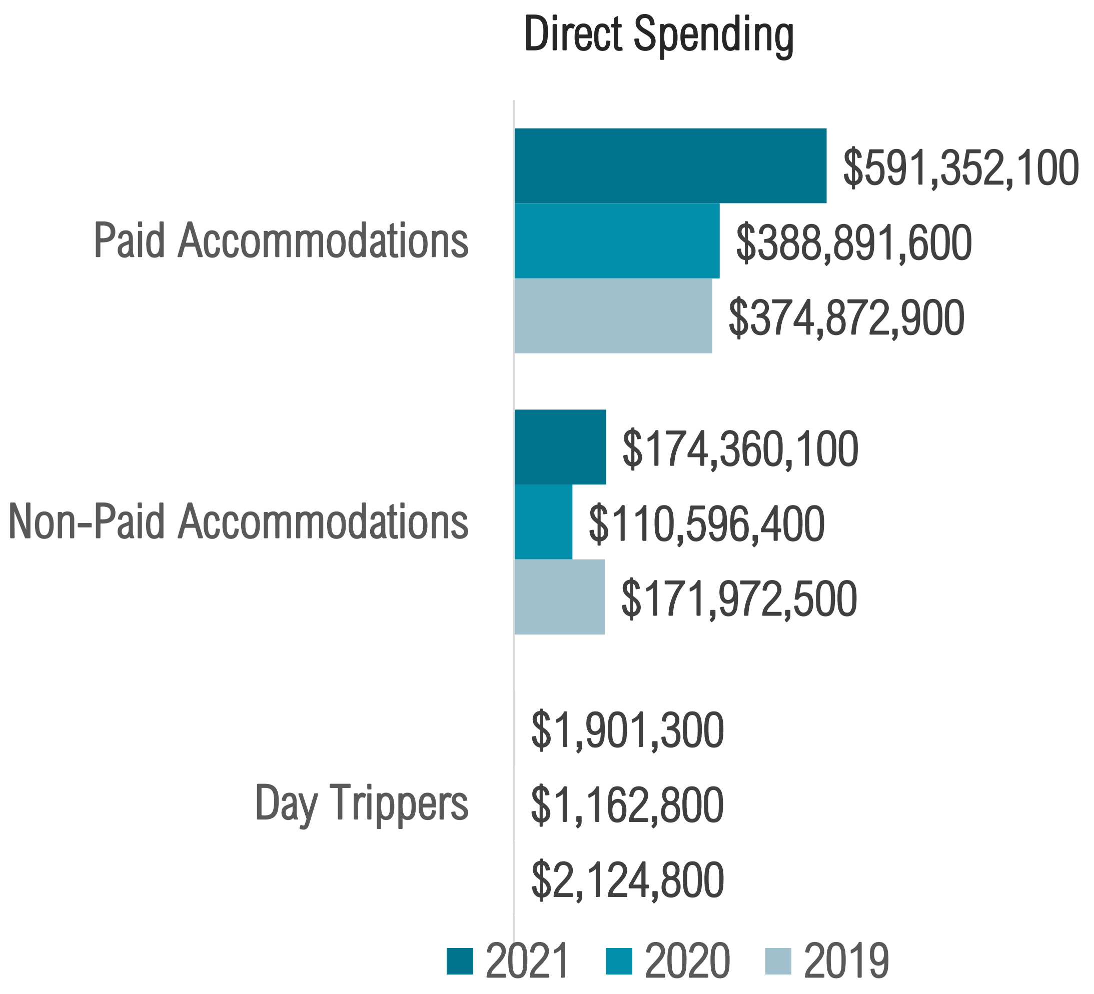
VISITOR TYPE

Visitors staying in paid accommodations accounted for nearly **3 in 4** visitors.



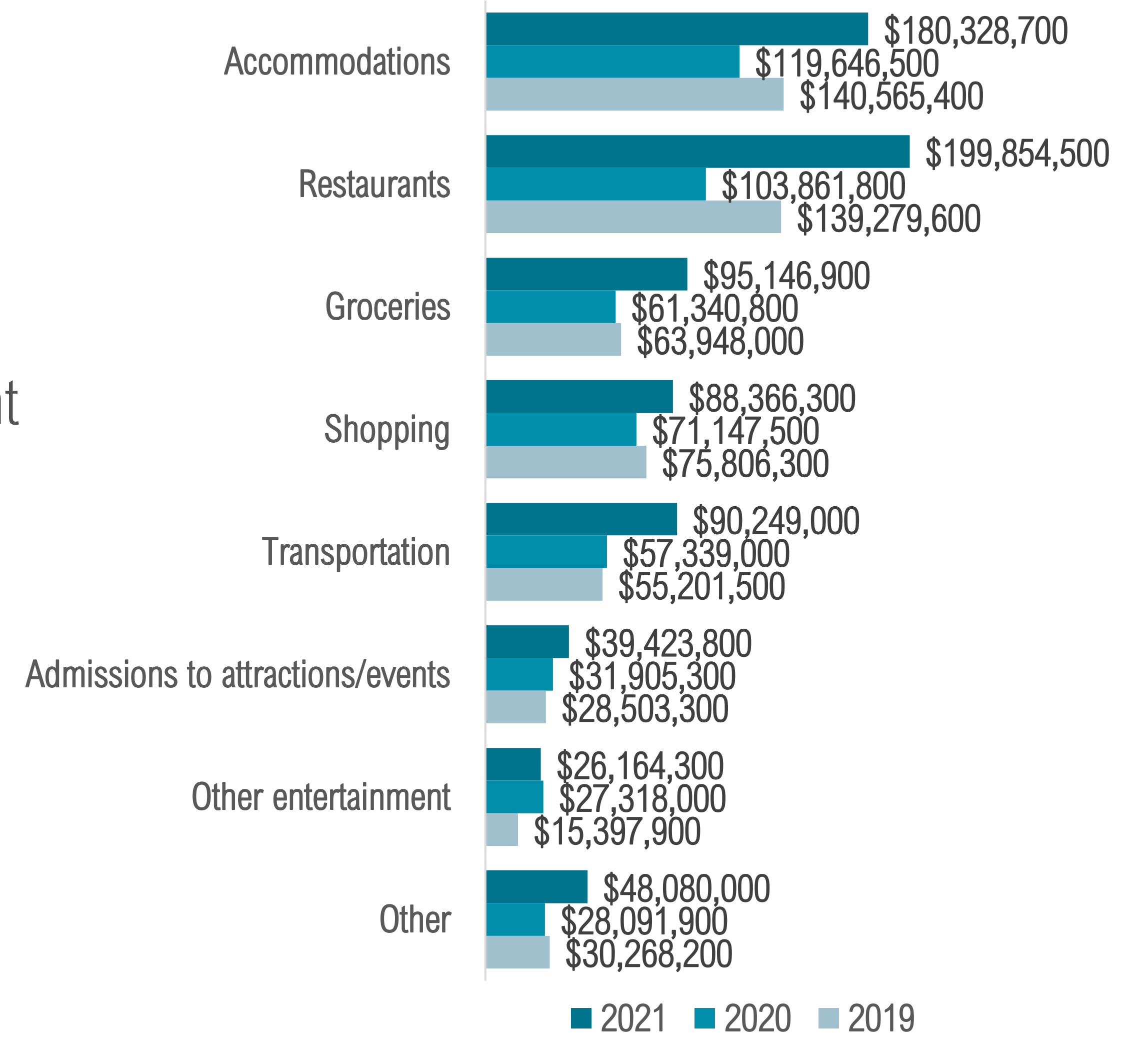
VISITOR EXPENDITURES BY VISITOR TYPE

July – September visitors spent **$767,613,500** in The Beaches of Fort Myers & Sanibel, resulting in a total economic impact of **$1,223,575,900**, up 37.2% from 2019 & up 50.5% from 2020.



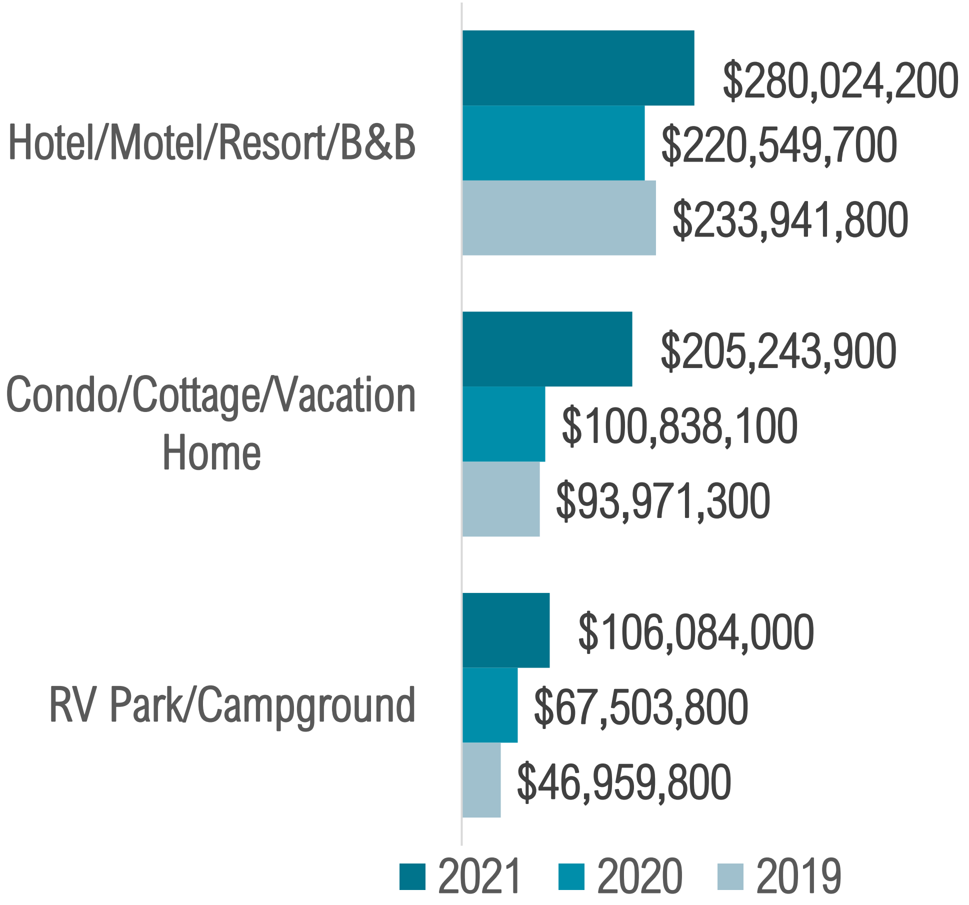
VISITOR EXPENDITURES BY SPENDING CATEGORY

Of the **$767,613,500** visitors spent in The Beaches of Fort Myers & Sanibel, 23% was spent on **accommodations** and 26% was spent on **restaurants**, accounting for **nearly half of all visitor spending**.



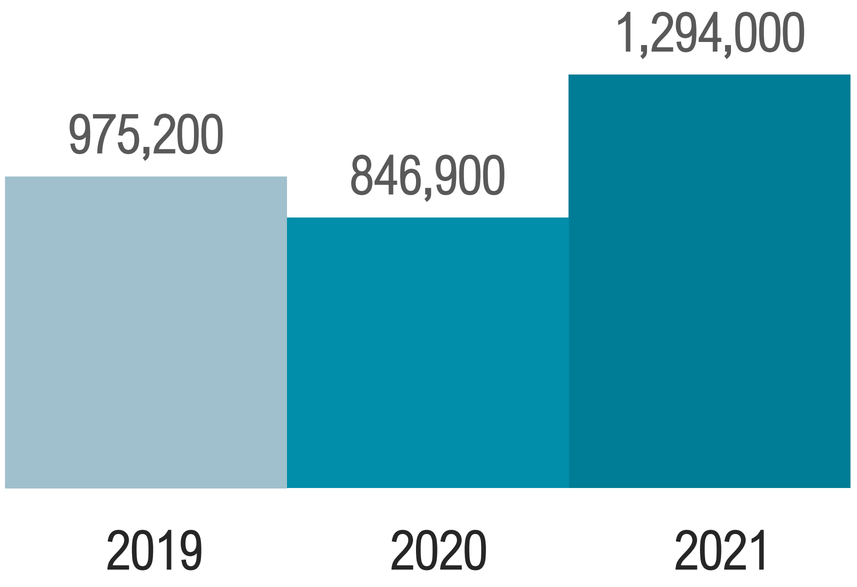
VISITOR EXPENDITURES BY LODGING TYPE

July – September visitors staying in paid accommodations spent $591,352,100 in The Beaches of Fort Myers & Sanibel.



ROOM NIGHTS GENERATED

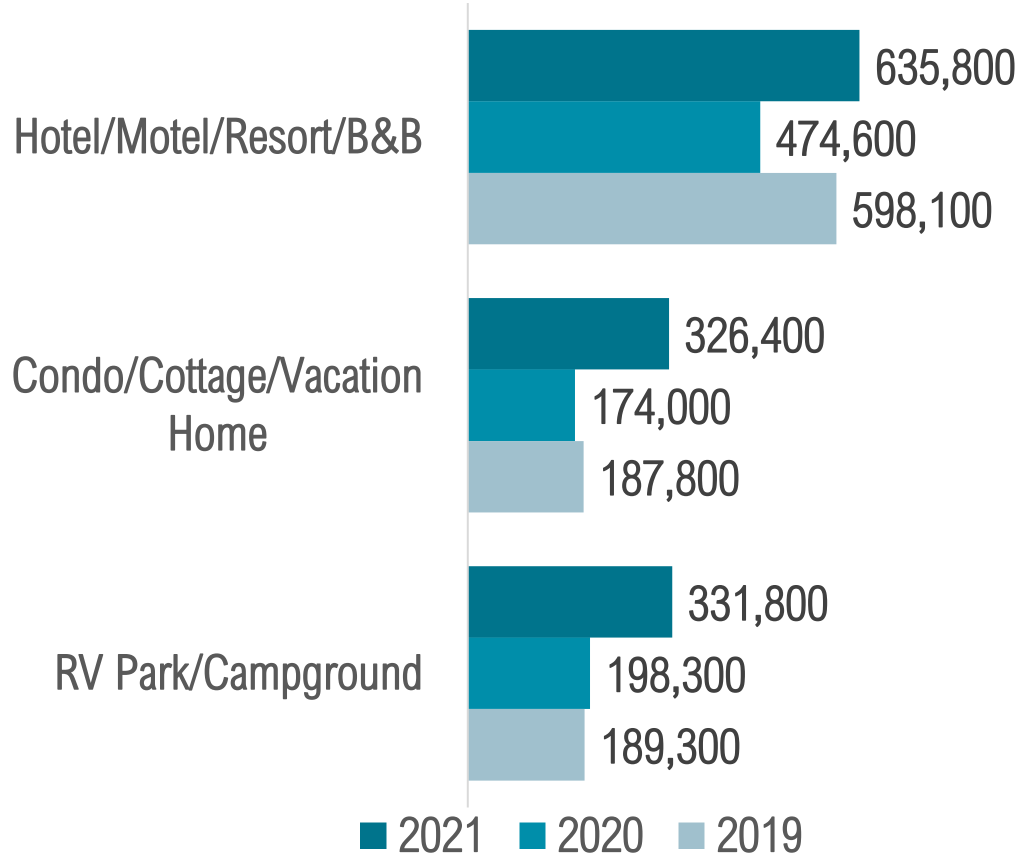
July – September visitors spent **1,294,000** nights in The Beaches of Fort Myers & Sanibel hotels, resorts, condos, rental houses, etc. (+32.7% from 2019 & +52.8% from 2020).



[1]Source: Occupancy Survey

ROOM NIGHTS GENERATED

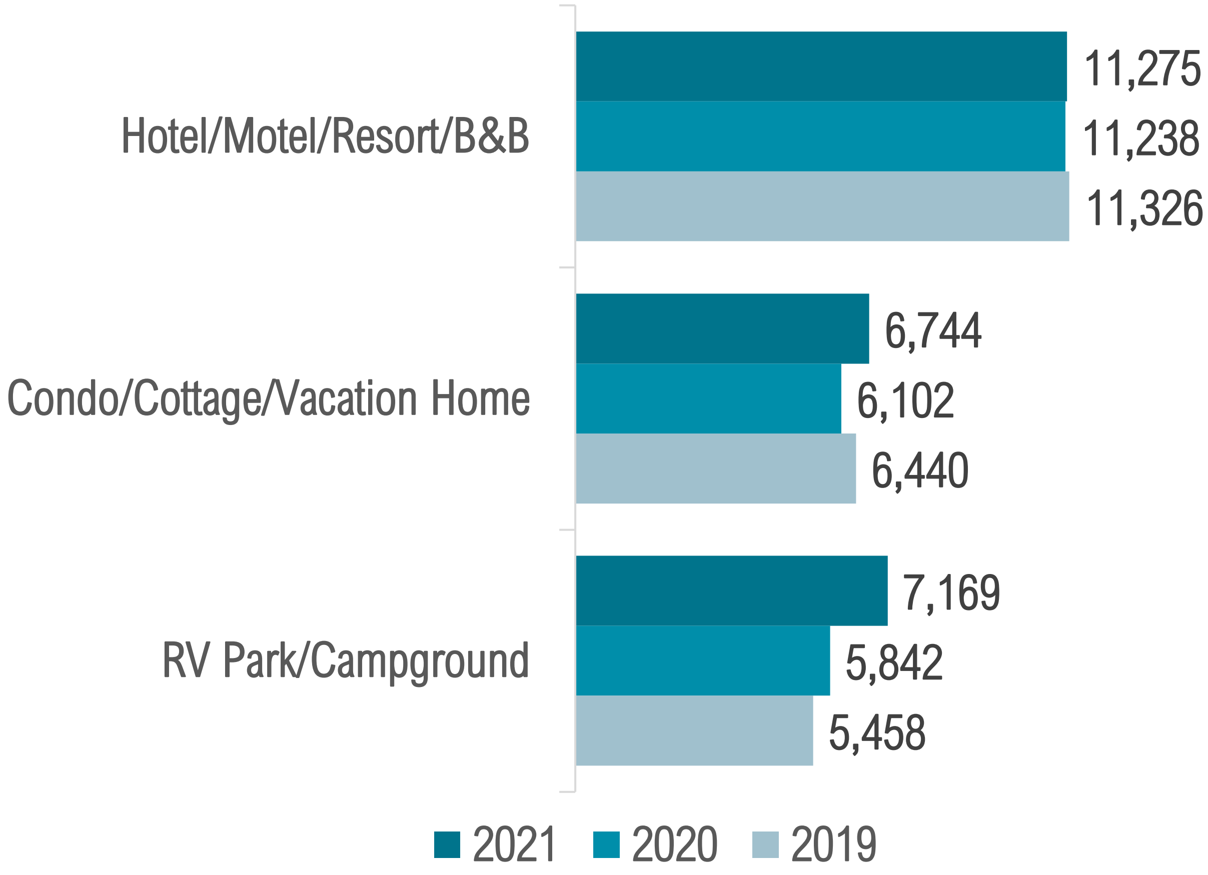
Of the 1,294,000 room nights, motels, hotels, etc. accounted for **nearly 1 in 2** nights in The Beaches of Fort Myers & Sanibel, while vacation rentals accounted for **1 in 4** nights visitors spent in the area.



[1]Source: Occupancy Survey

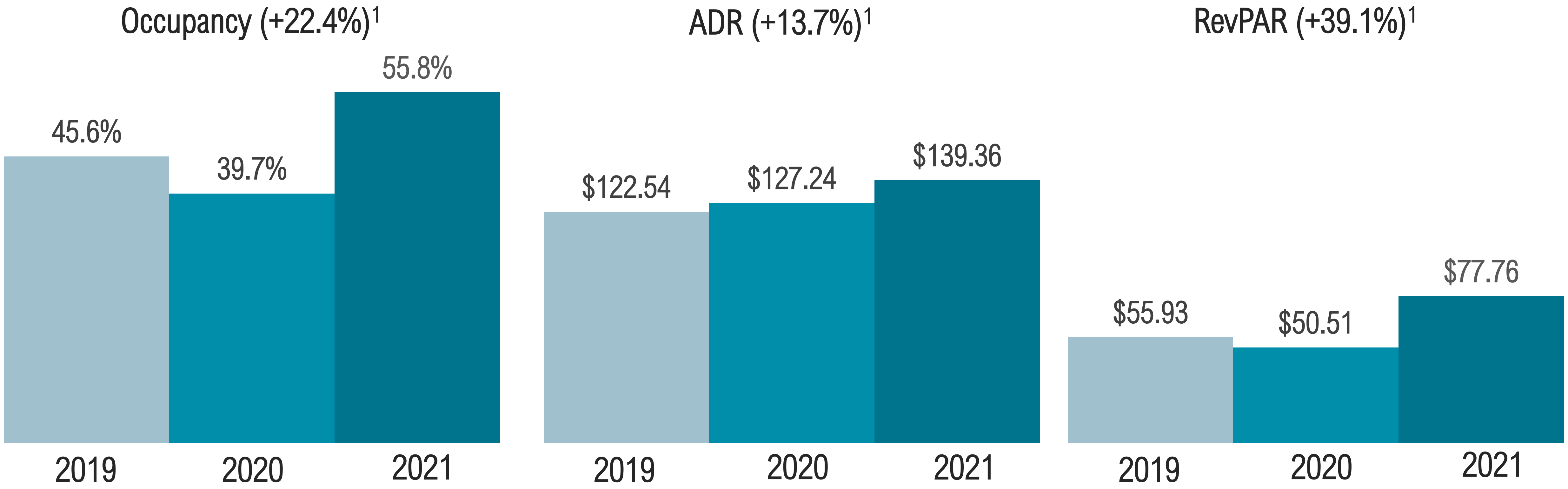
AVAILABLE UNITS

There were **25,188**[1] available units in July – September, 2021 vs. 23,224 in 2019 (+8.5%). Nearly half of the units were hotels, motels, etc.



[1]Source: Occupancy Survey

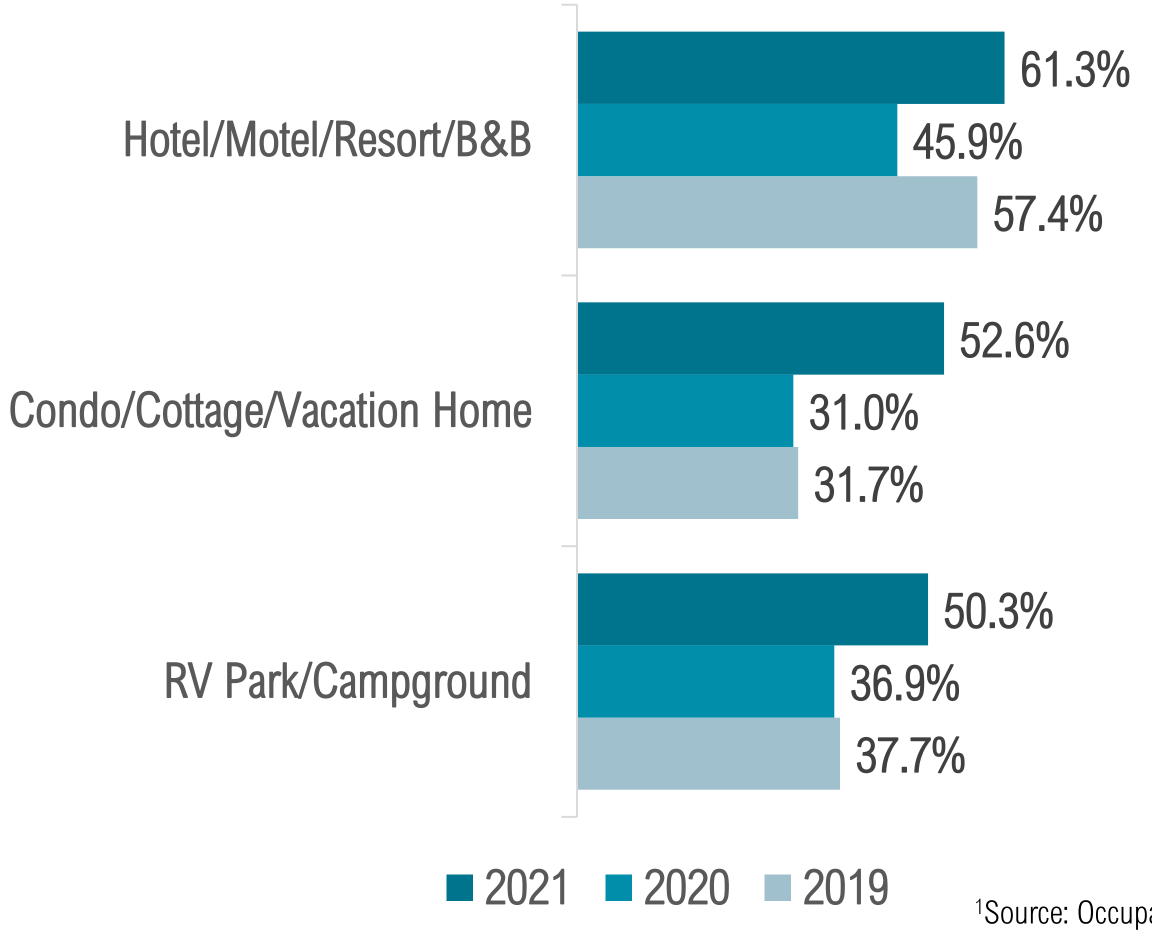
OCCUPANCY, ADR AND REVPAR



[1]Source: Occupancy Survey

OCCUPANCY

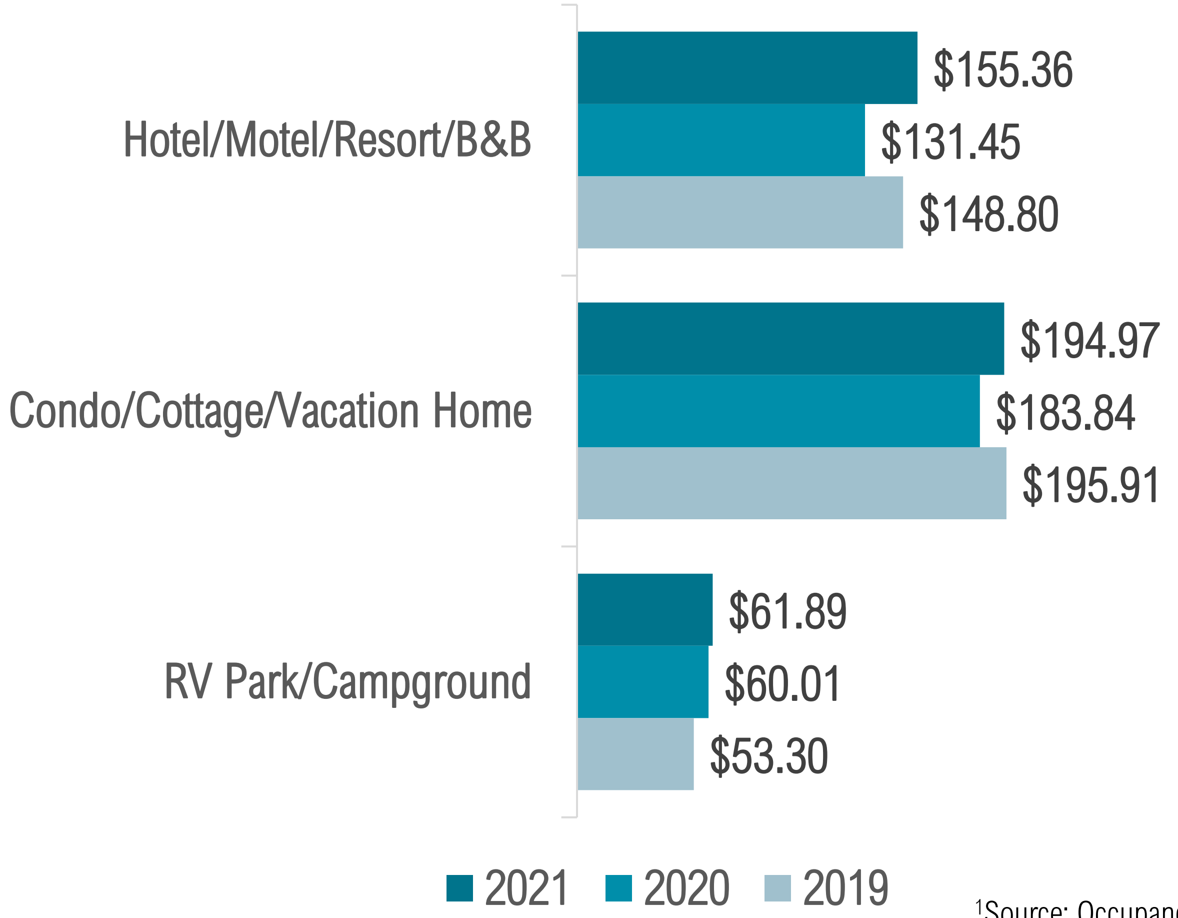
Average occupancy in July – September was 55.8%[1] with hotels having the highest occupancy



[1]Source: Occupancy Survey

ADR

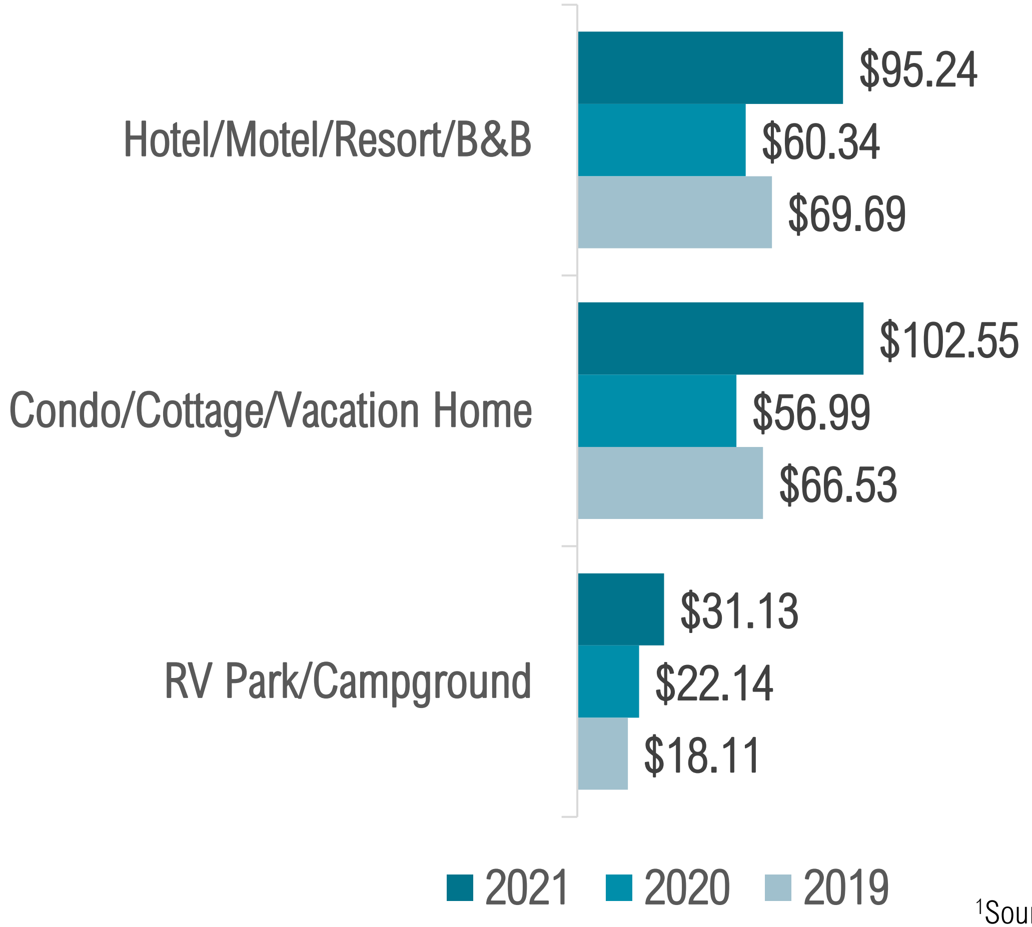
ADR in July – September was **$139.36**[1] with vacation rentals having the highest rate



[1]Source: Occupancy Survey

REVPAR

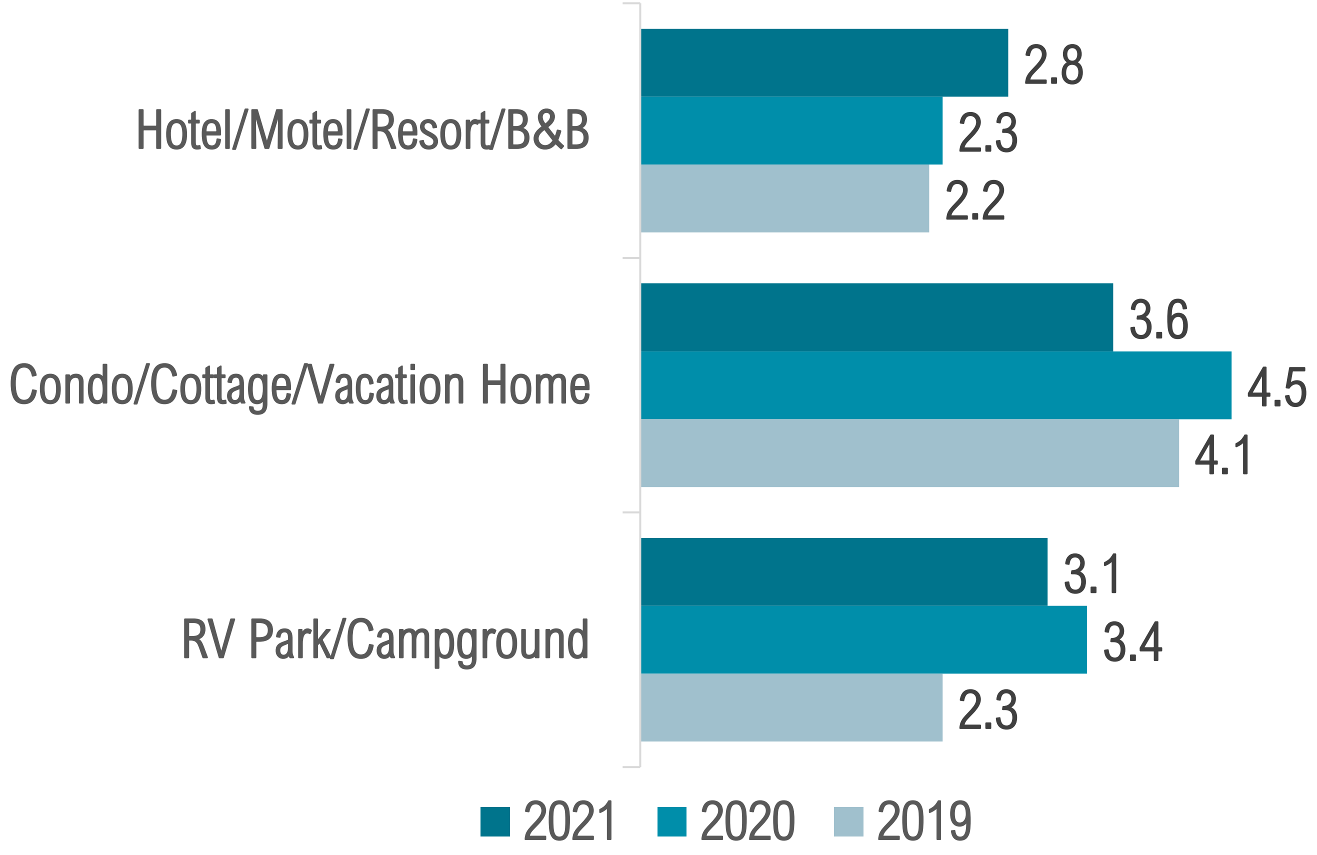
Average RevPAR in July – September was $77.76[1] with vacation rentals having the highest RevPAR



[1]Source: Occupancy Survey

TRAVEL PARTY SIZE

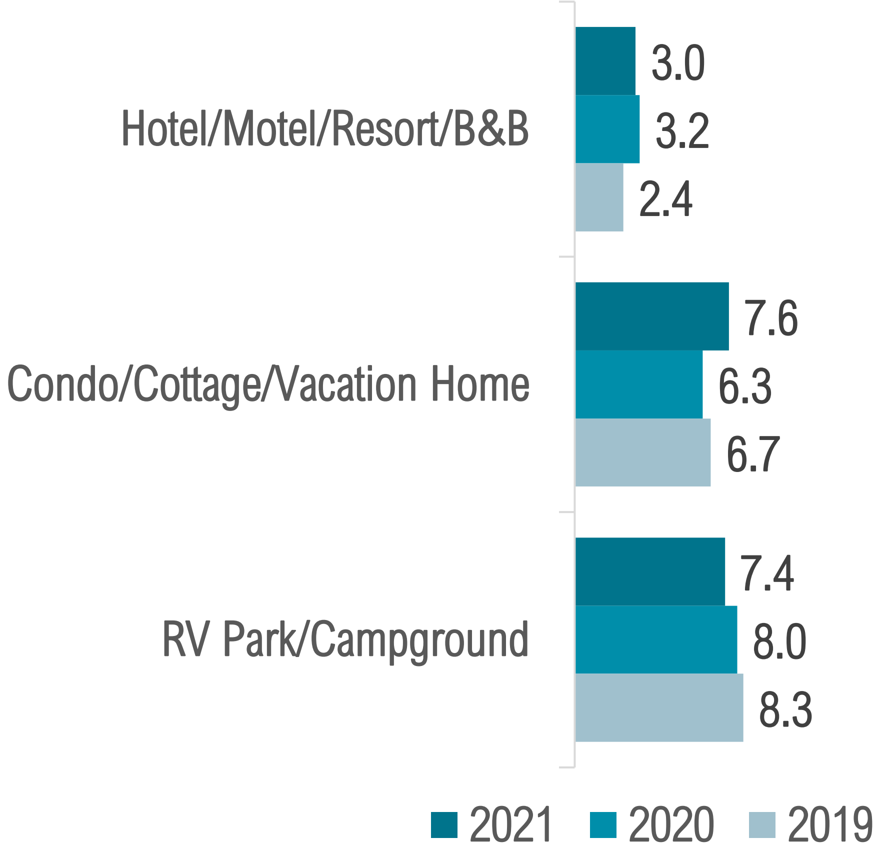
For visitors in paid accommodations, average travel party size in July – September was **3.0 people**[1] (2.6 people in 2019 & 3.0 people in 2020).



[1]Source: Occupancy Survey

LENGTH OF STAY

For visitors in paid accommodations, average length of stay in July – September was **4.5 nights**[1] (3.5 nights in 2019 & 4.6 nights in 2020).



[1]Source: Occupancy Survey

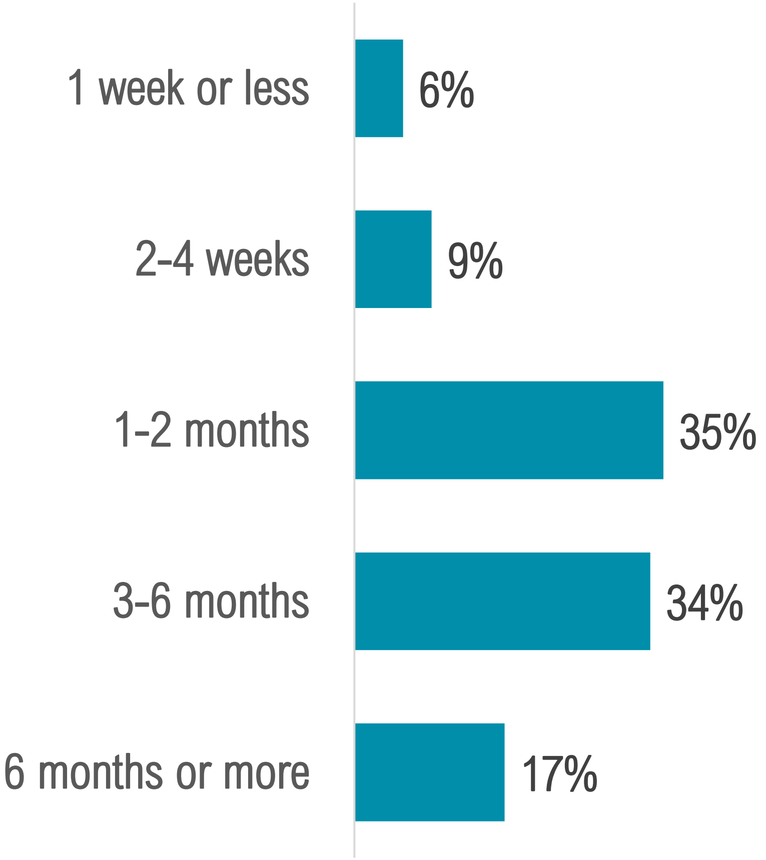
Visitor Journey: Pre-Visit

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

TRIP PLANNING CYCLE

Over **half** of visitors planned their trip **more than 3 months** in advance.

Trip planning windows were slightly longer in 2021.

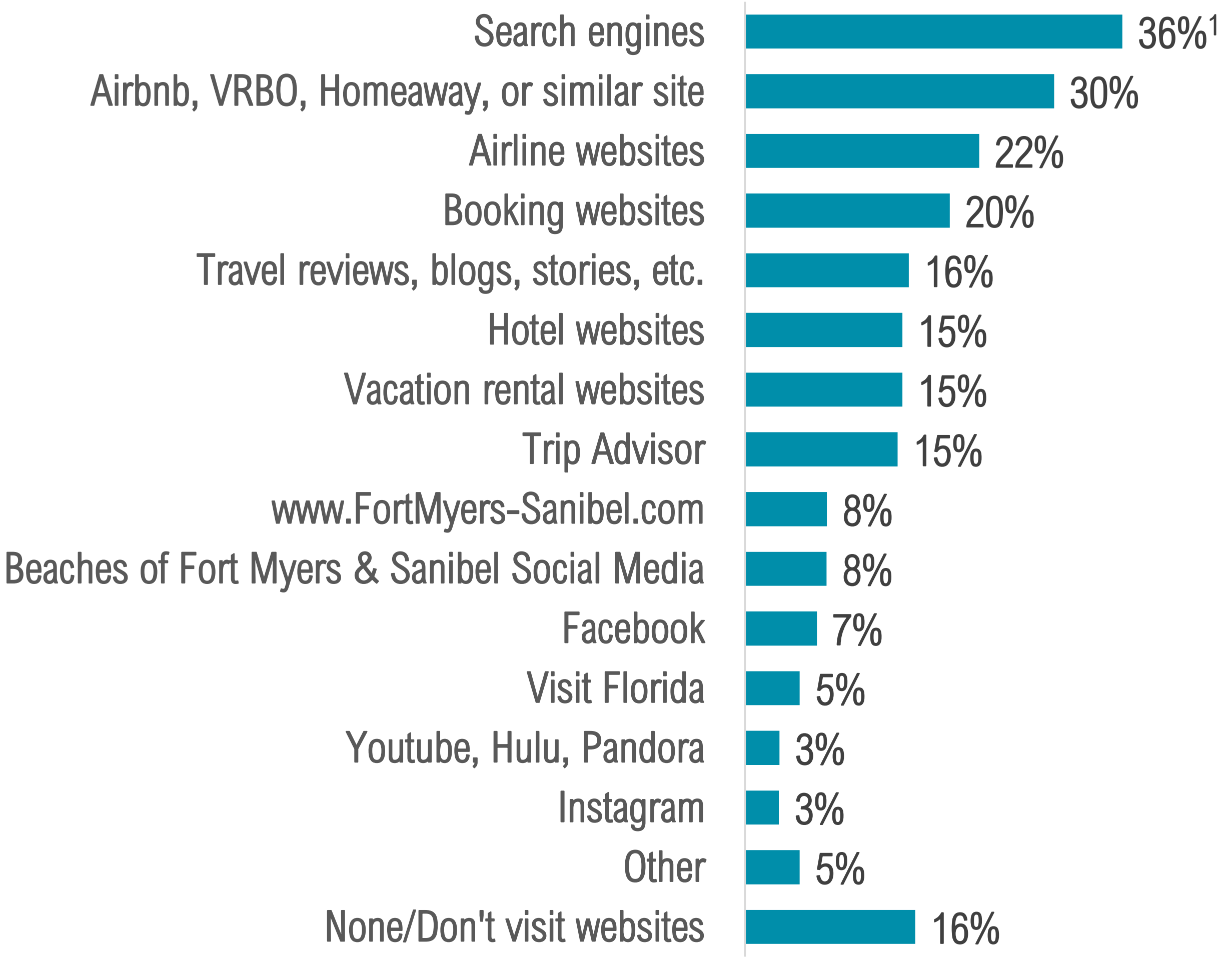


TRIP PLANNING: WEBSITES/APPS USED

Over 4 in 5 visitors used **websites/apps** to plan their trip to The Beaches of Fort Myers & Sanibel.

Visitors were more likely to use **search engines, Airbnb/VRBO/HomeAway** and **airline websites** to plan their trips.

2021 visitors were more likely to use **Airbnb/VRBO/HomeAway** and **vacation rental websites** to plan their trips.



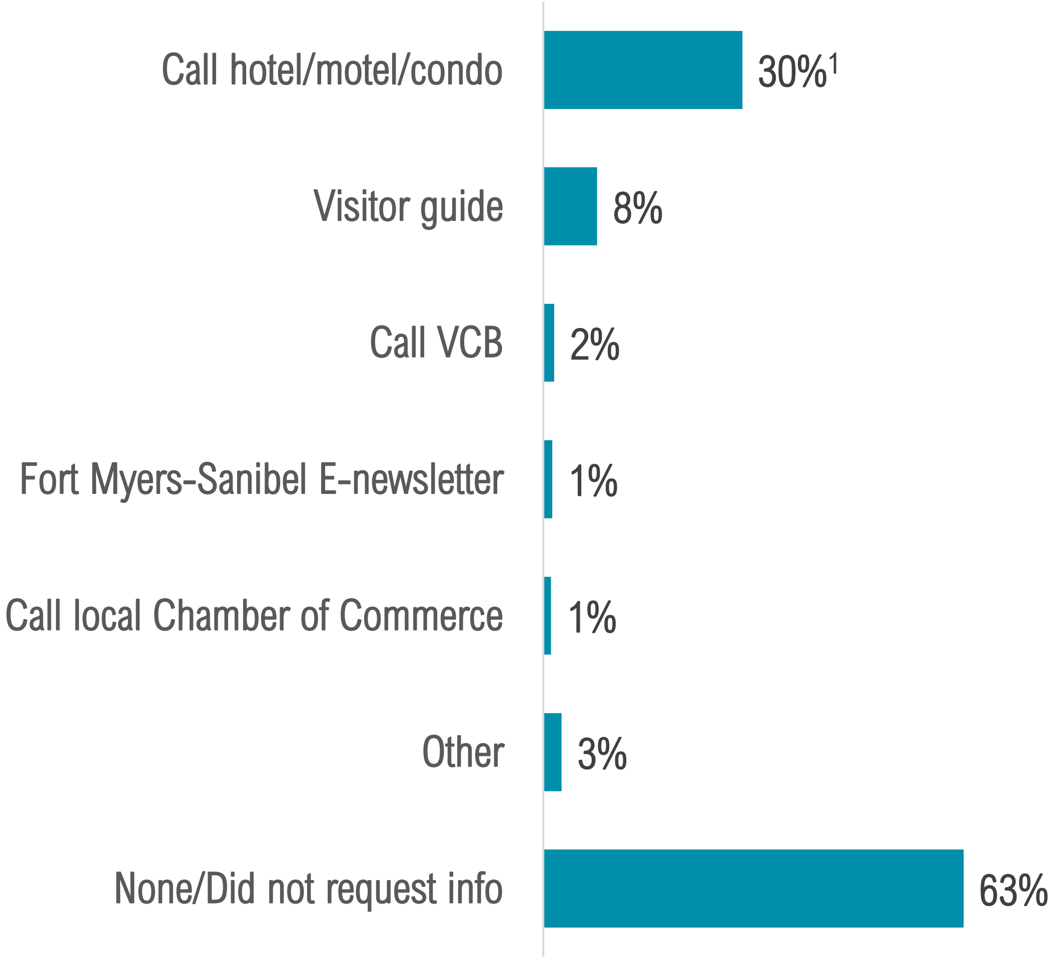
[1]Multiple responses permitted.

TRIP PLANNING: INFORMATION REQUESTS

Nearly 2 in 5 visitors made information requests to plan their trip to The Beaches of Fort Myers & Sanibel.

Visitors who sought information prior to their trips were more likely to rely on hotels/condos and visitor guides.

A higher percentage of visitors requested information from hotels/motels/condos in July-September 2021

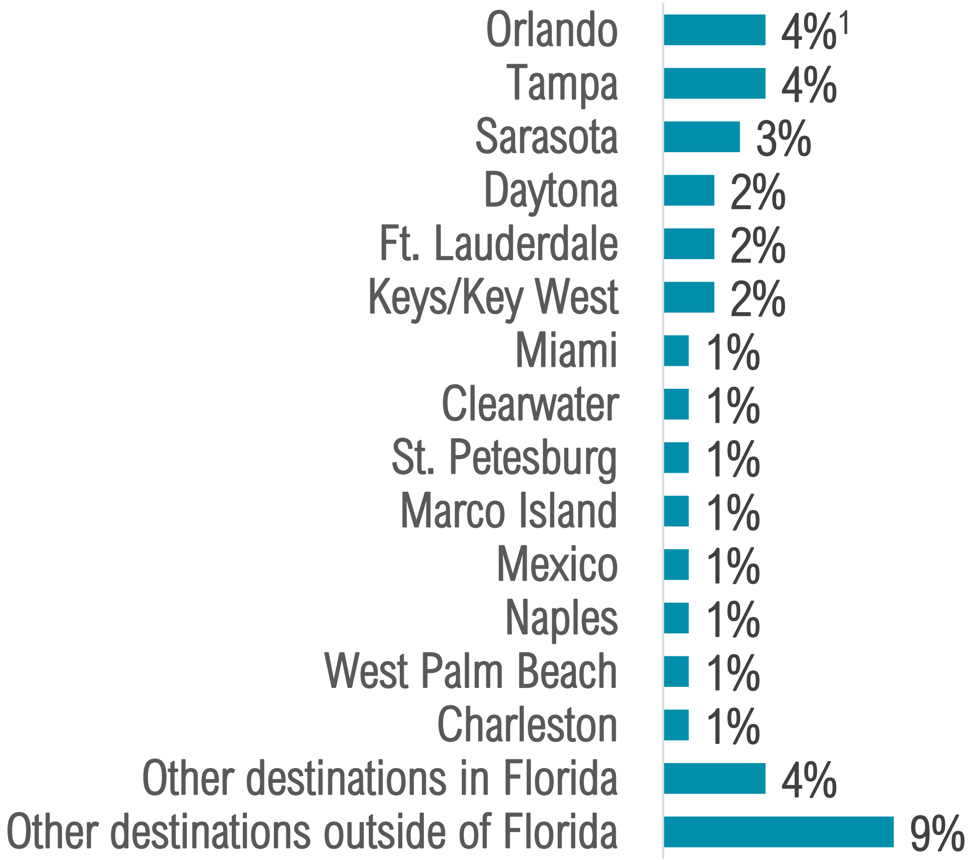


[1]Multiple responses permitted.

TRIP PLANNING: OTHER DESTINATIONS CONSIDERED

36% of visitors considered choosing other destinations when planning their trips.

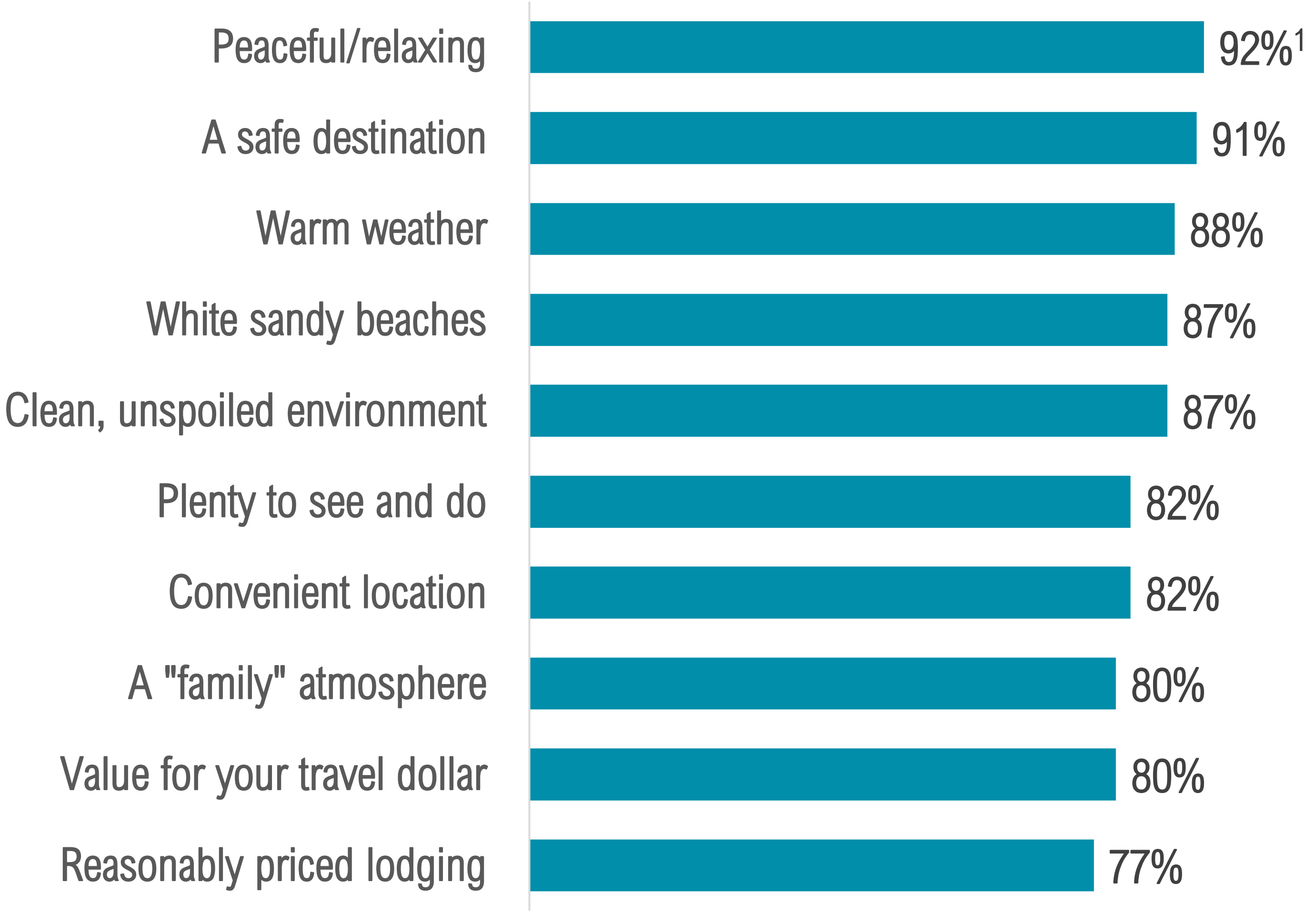
Most alternative destinations were in Florida.



[1]Multiple responses permitted.

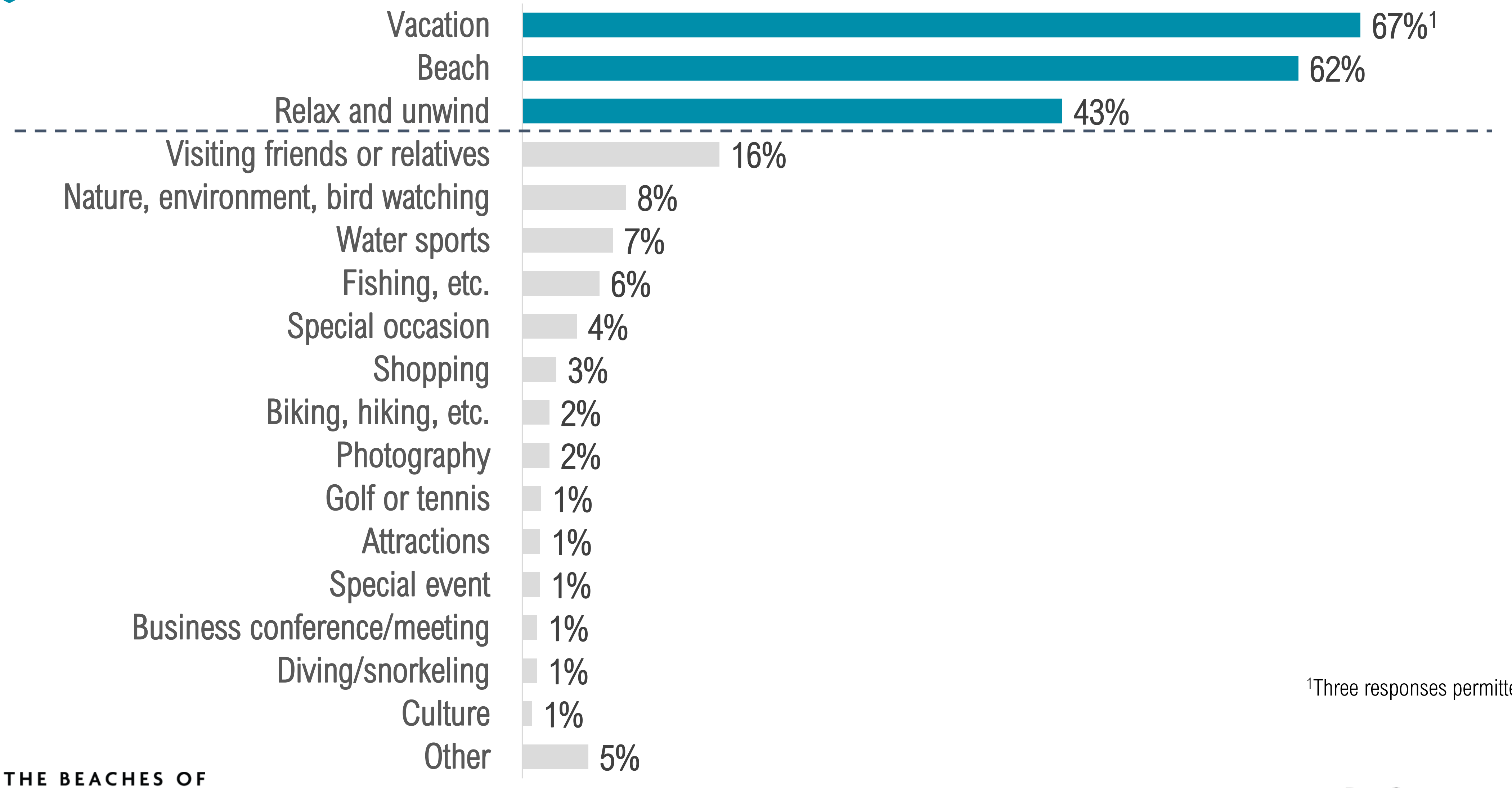
TRIP INFLUENCERS

Over 9 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.

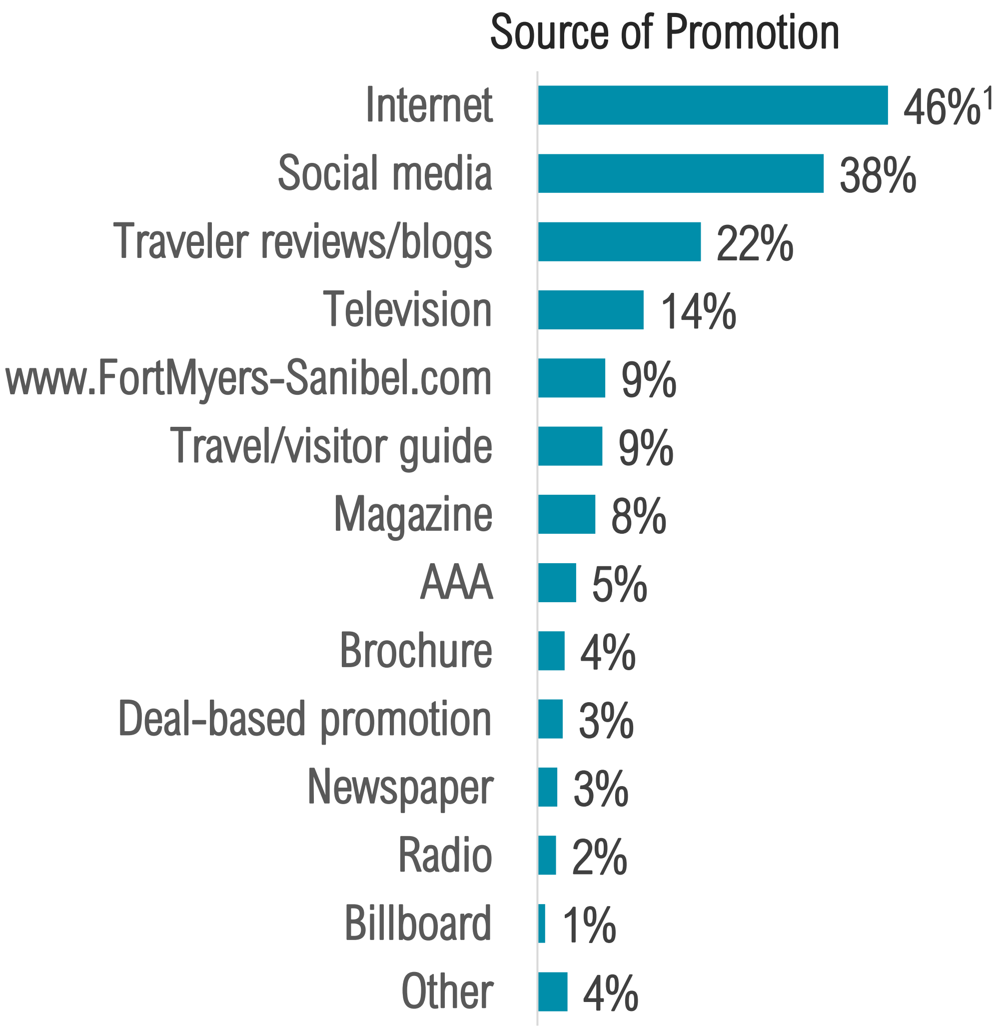
REASON FOR VISITING



[1]Three responses permitted.

PROMOTIONS

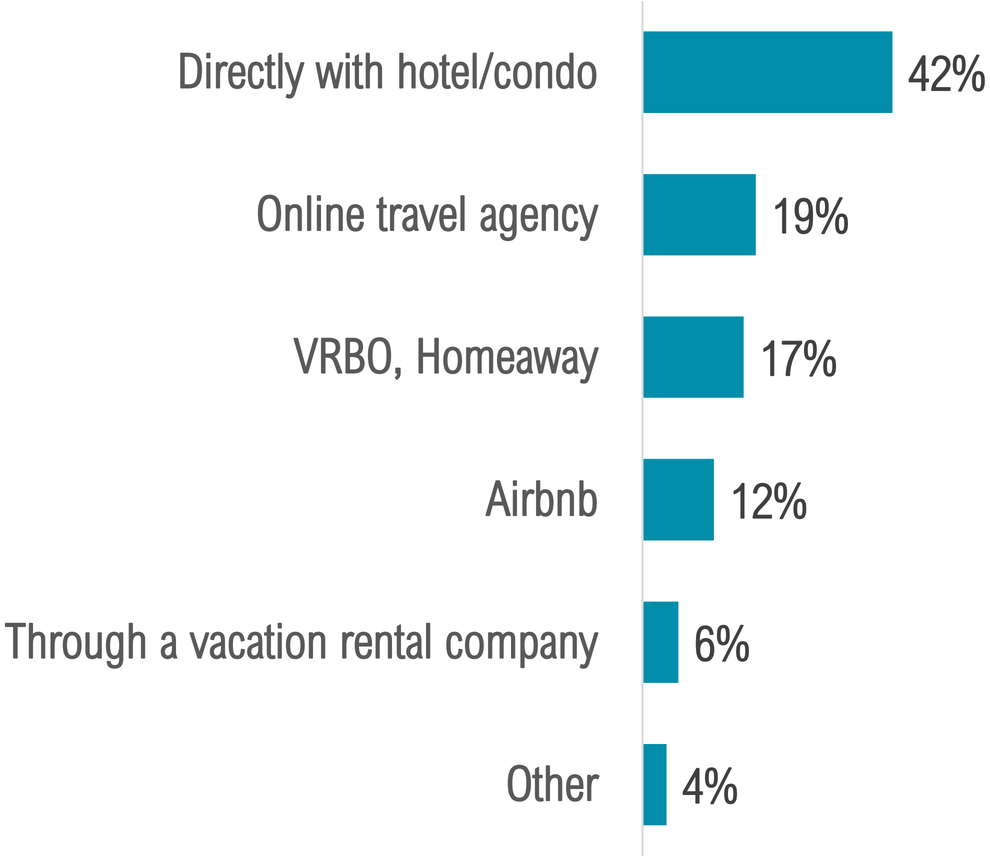
42% of visitors **recalled promotions** in the past 6 months for The Beaches of Fort Myers & Sanibel (+6% points from 2020).



[1]Multiple responses permitted.

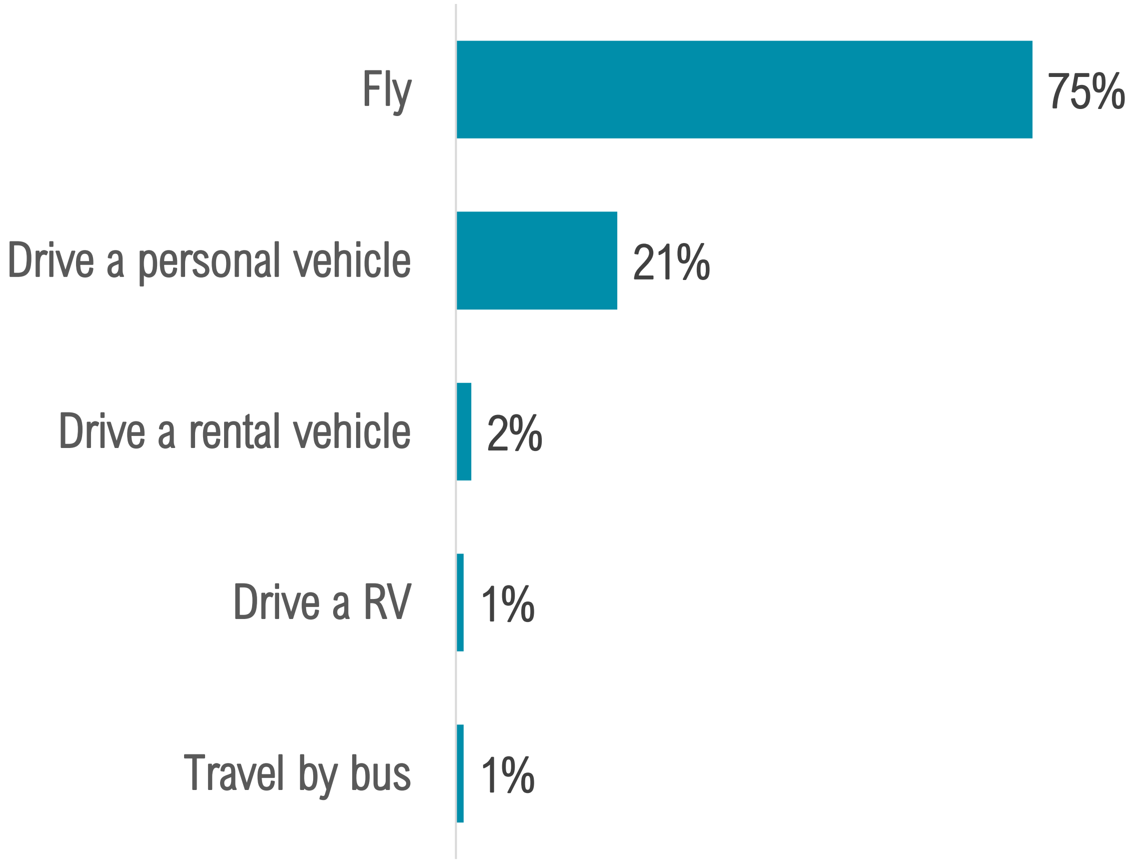
BOOKING

Over 2 in 5 visitors who stayed in paid accommodations **booked directly with a hotel/condo**.



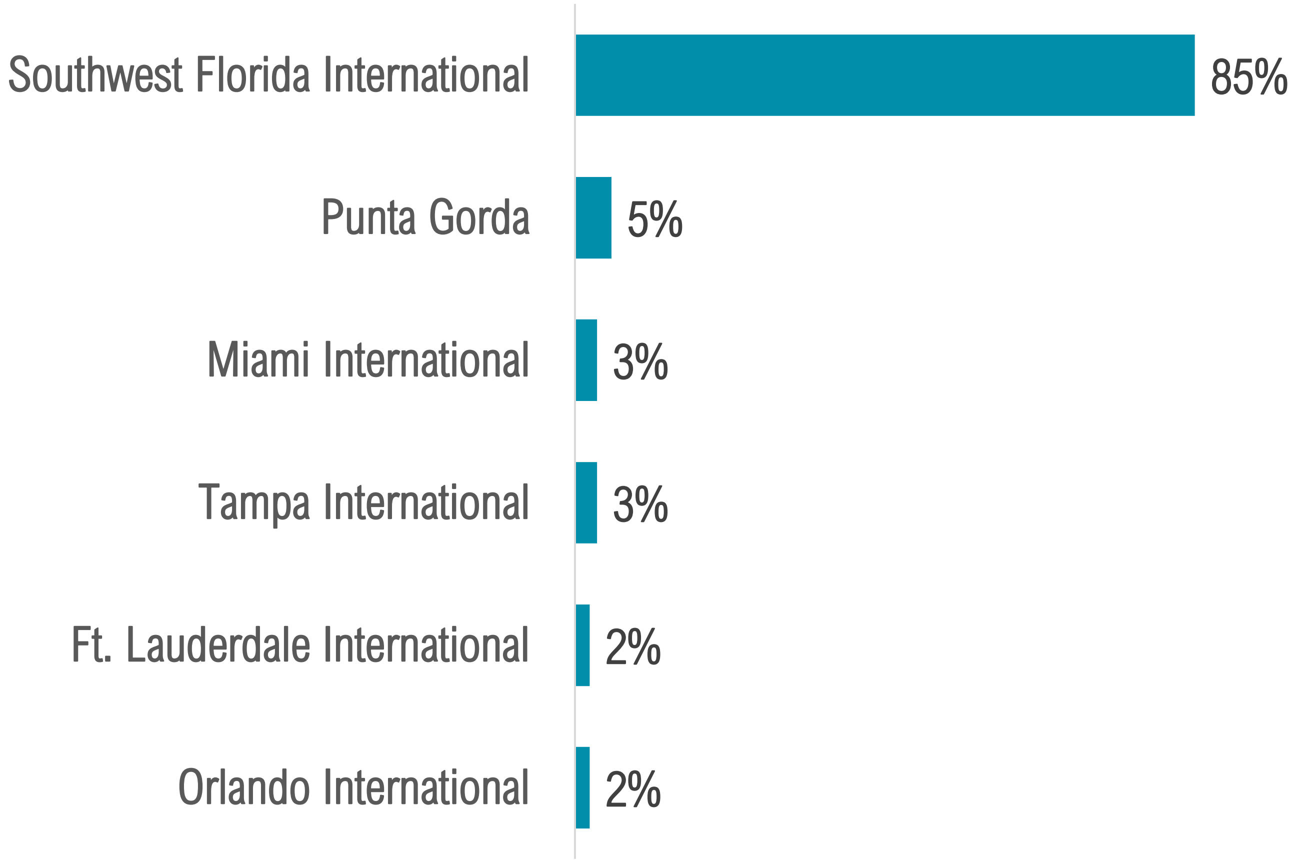
TRANSPORTATION

3 in 4 visitors flew to The Beaches of Fort Myers & Sanibel, up 20% points from 2020.



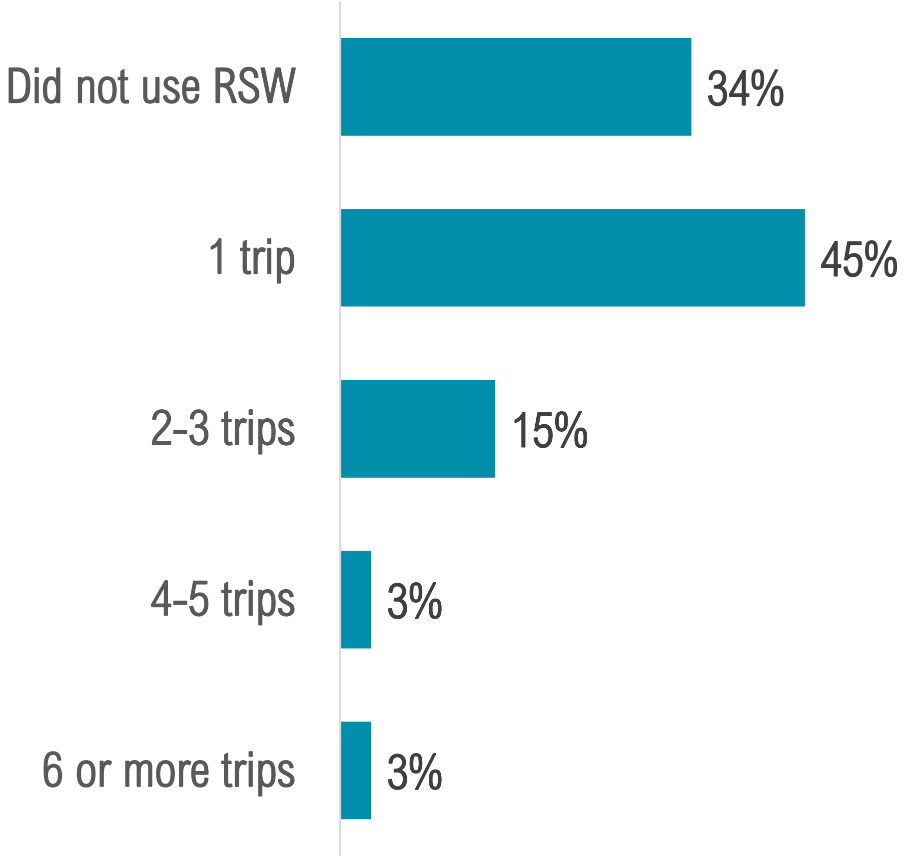
AIRPORT

Over 4 in 5 visitors who flew to The Beaches of Fort Myers & Sanibel came through RSW – this translates to 64% of all visitors.



USE OF RSW IN THE PAST YEAR

2 in 3 visitors used RSW at least once in the past year.



VISITOR JOURNEY: TRAVEL PARTY PROFILE

Pre-Visit

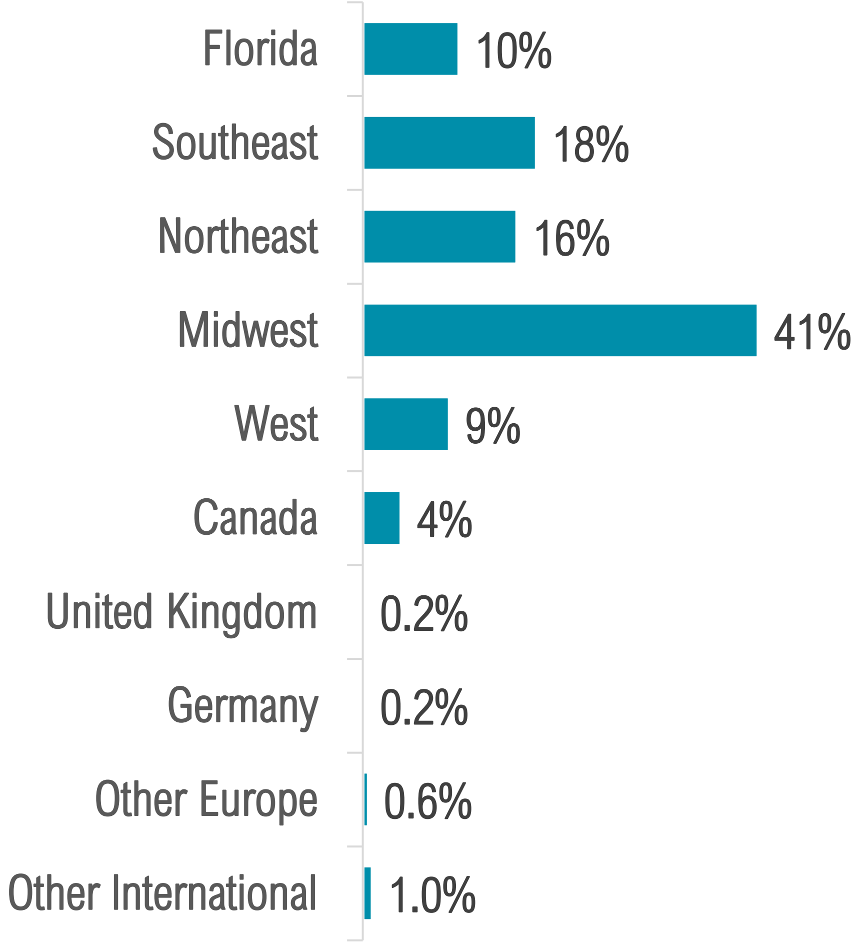
Travel Party Profile

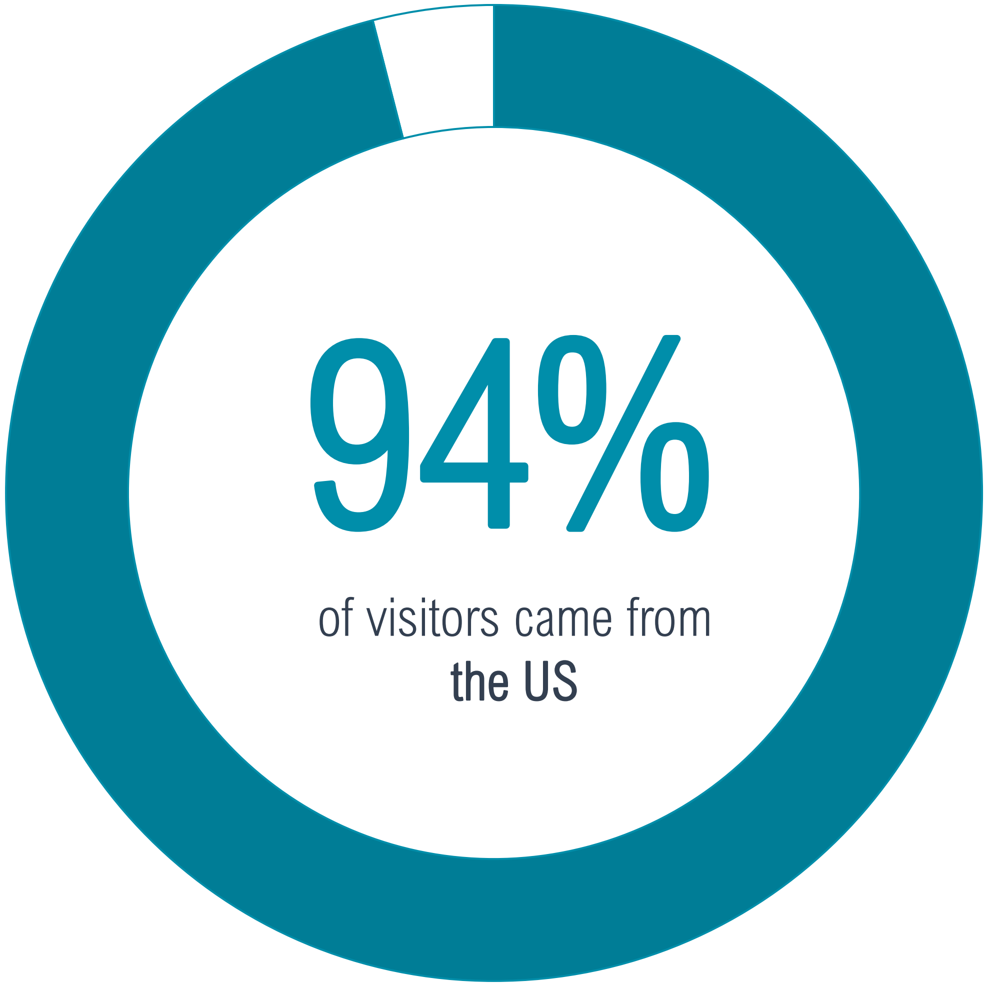
Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

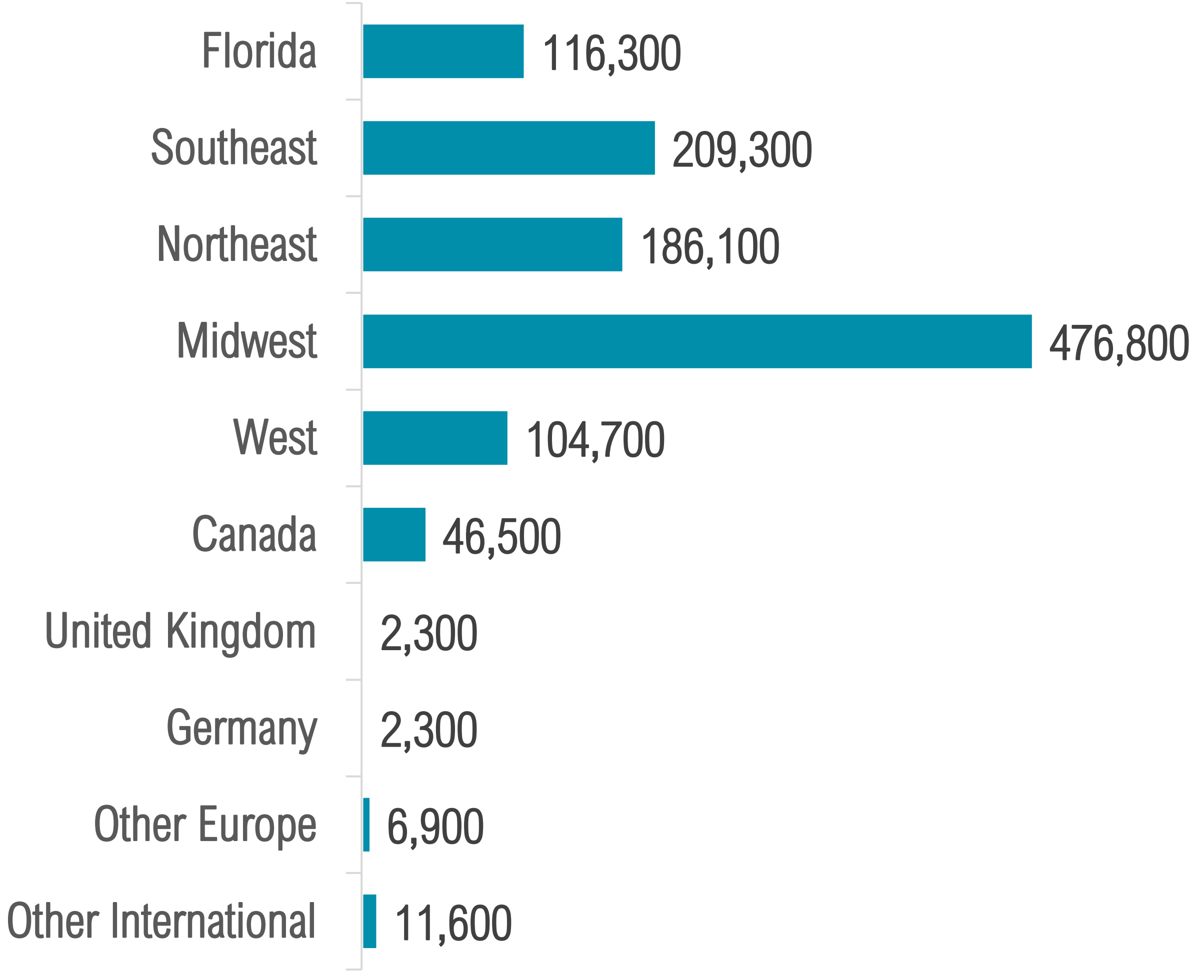
ORIGIN[1]



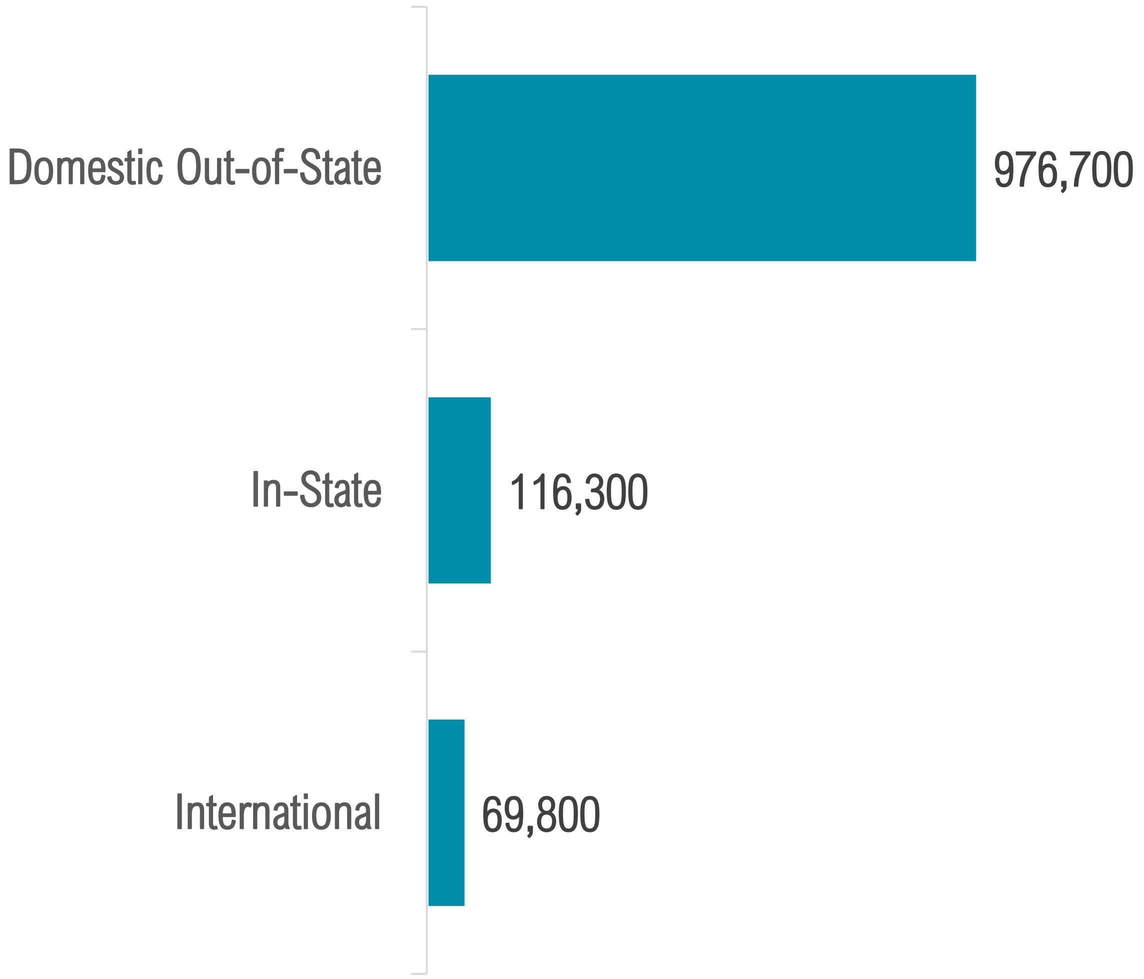


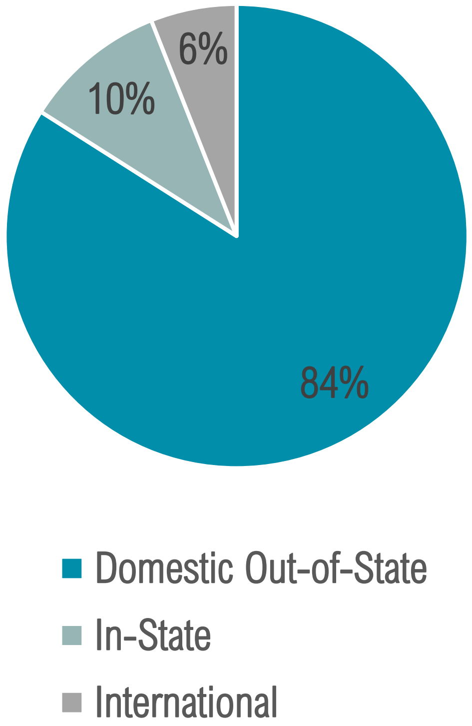
[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers.

NUMBER OF VISITORS BY ORIGIN



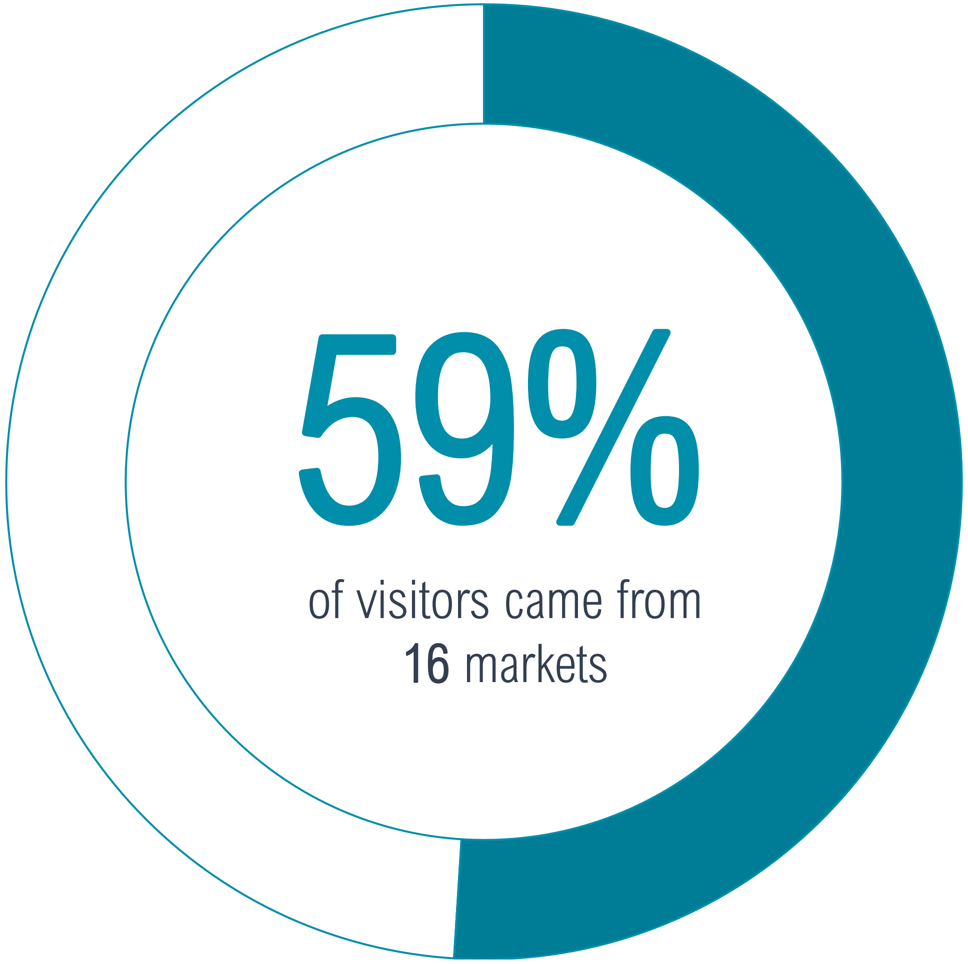
NUMBER OF VISITORS BY ORIGIN





ORIGIN MARKETS[1]

Market	Percentage of Visitors
Miami-Ft. Lauderdale	7%
Chicago	7%
New York City	7%
Detroit	5%
Cleveland	4%
Minneapolis	4%
Atlanta	3%
Kansas City	3%
Columbus, OH	3%
Pittsburgh	3%
Dallas-Ft. Worth	3%
Washington DC-Baltimore	2%
Indianapolis	2%
Green Bay-Appleton	2%
Jacksonville	2%
Denver-Aurora-Broomfield	2%



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

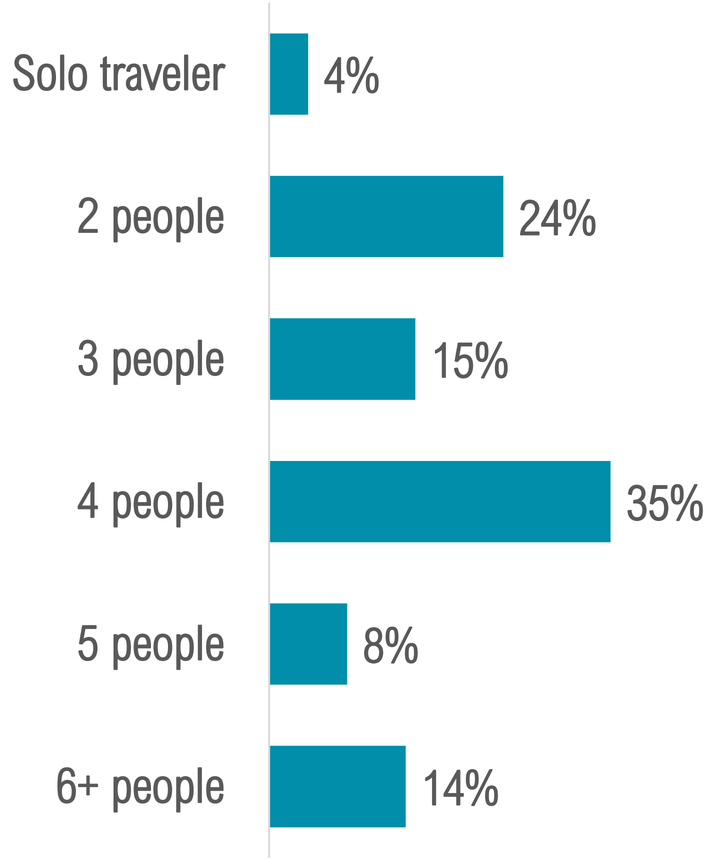
TRAVEL PARTY SIZE AND COMPOSITION

Travel Party Size

Visitors traveled in a party composed of **3.8[1] people** (same as 2020).

Travel with Children

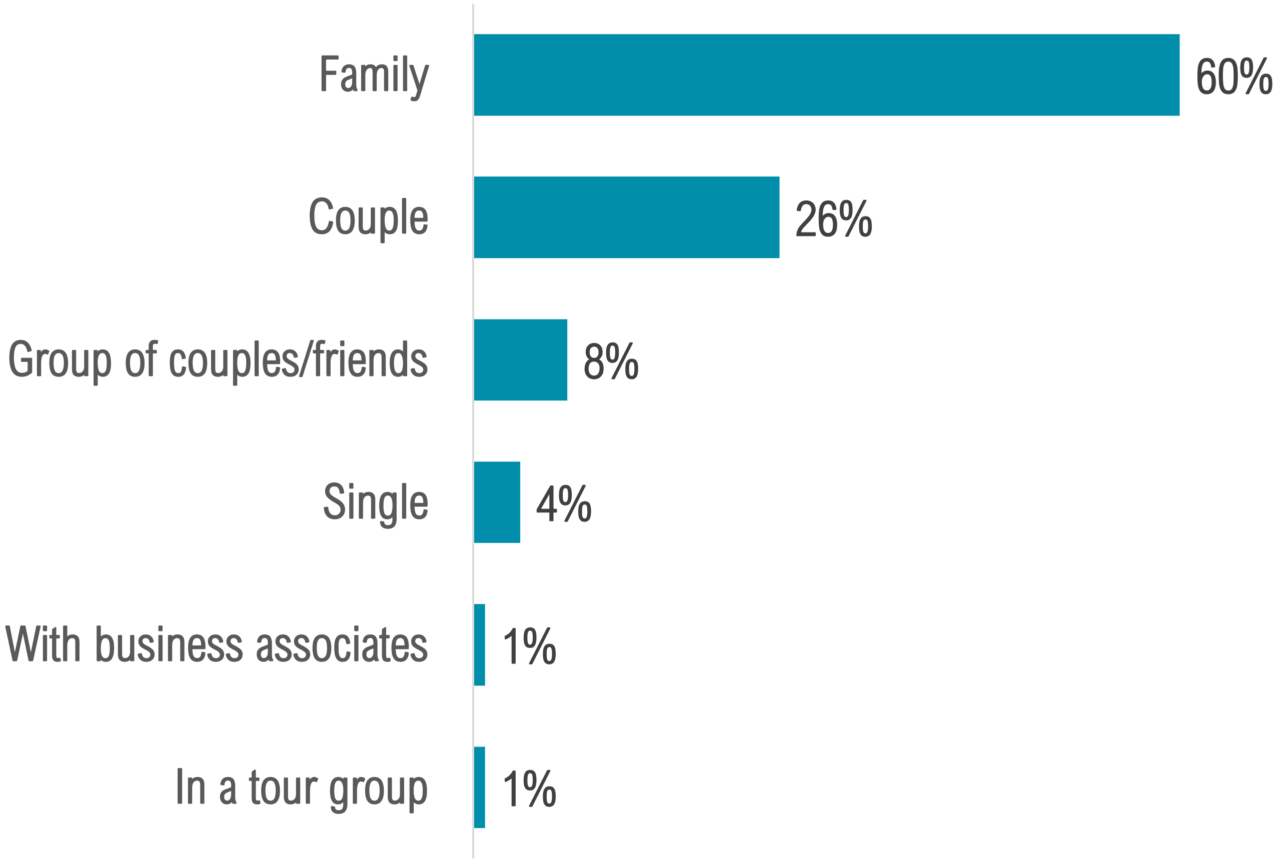
49% of visitors **traveled with children** under the age of 18 (38% in 2020).



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

TRAVEL PARTY TYPE

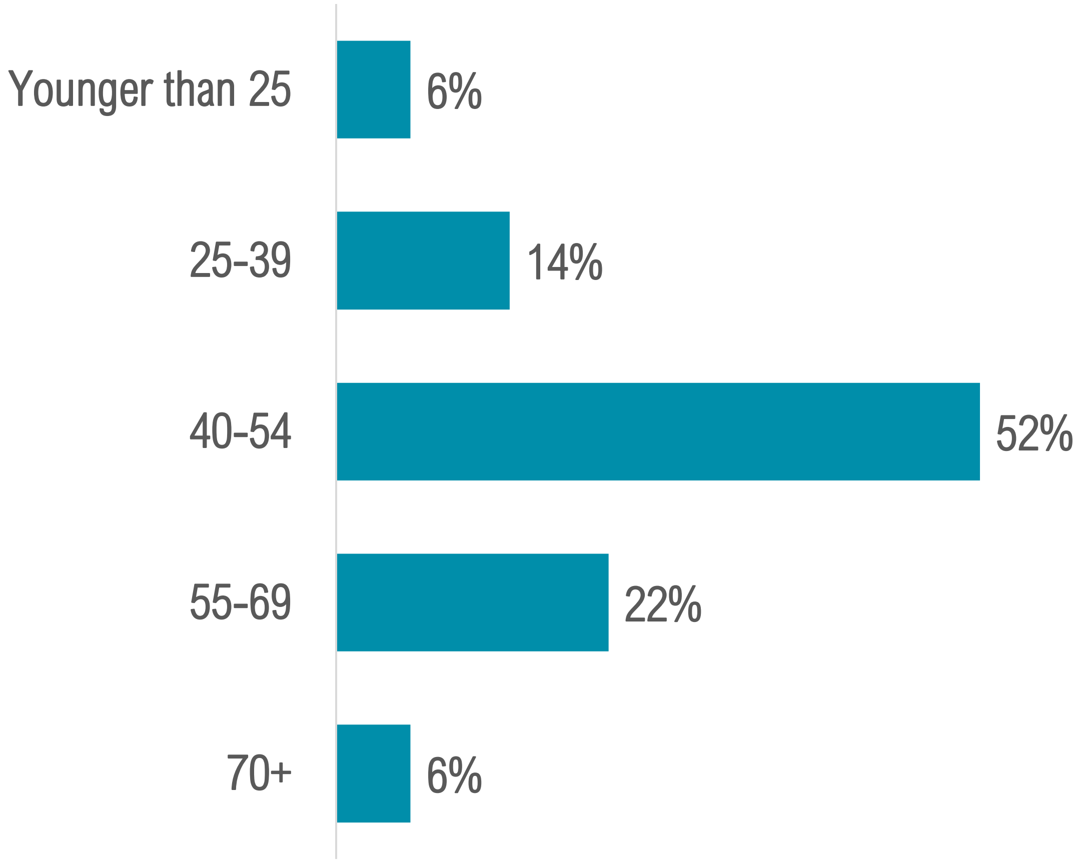
3 in 5 visitors traveled as a family, while 1 in 4 traveled as a couple.



AGE

Average Age

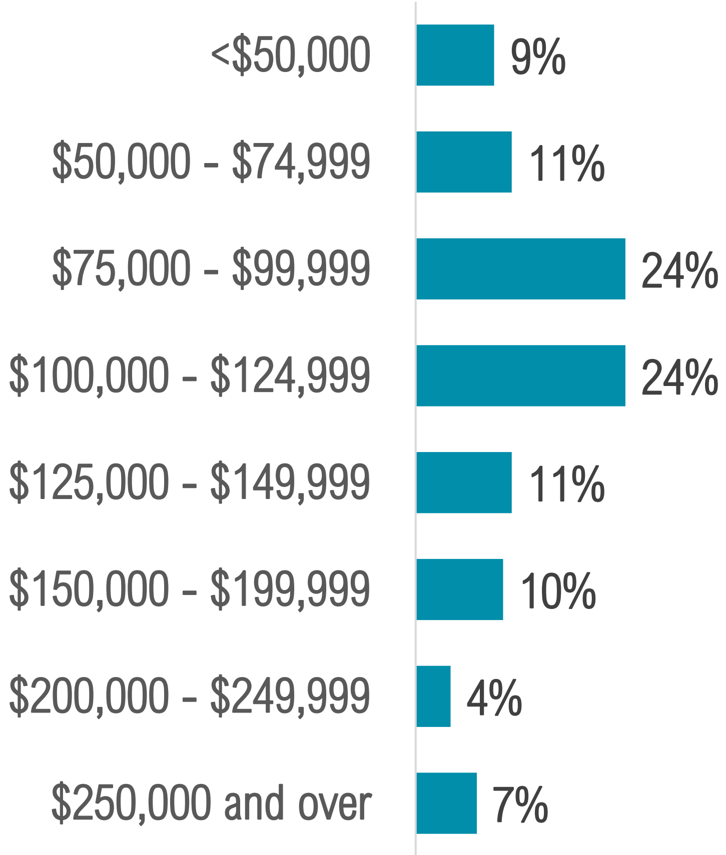
The average age of July – September visitors was **49 years old.**



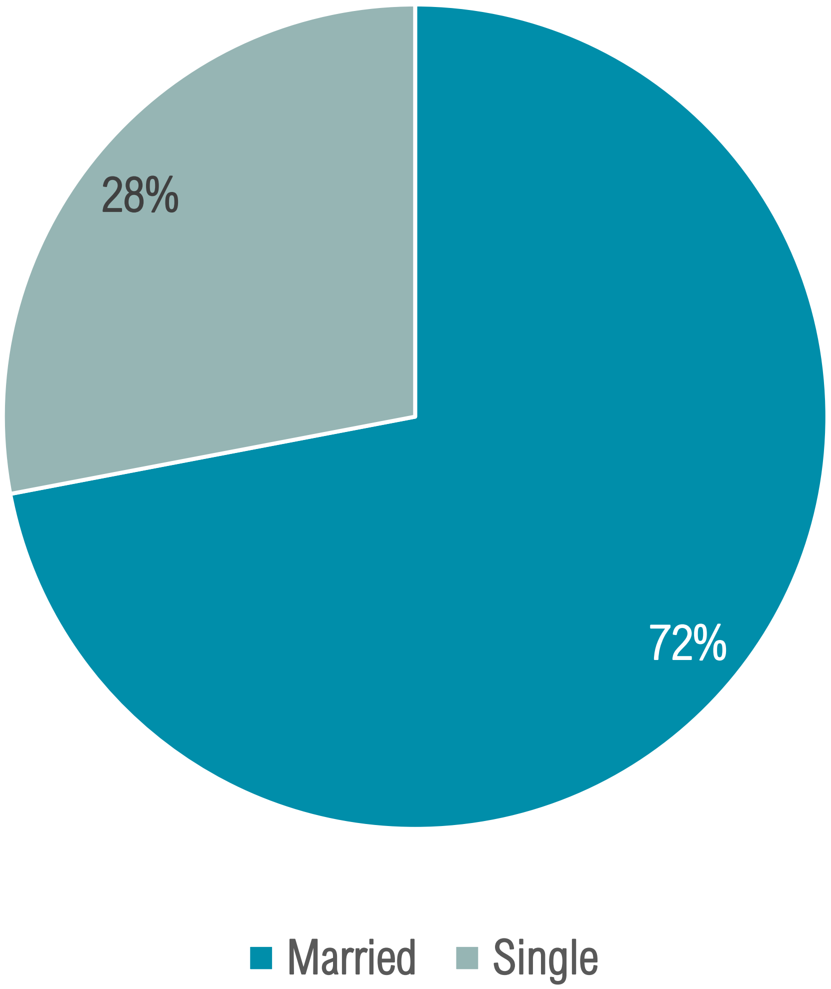
HOUSEHOLD INCOME

Median Household Income

July – September visitors had a median household income of **$106,300.**



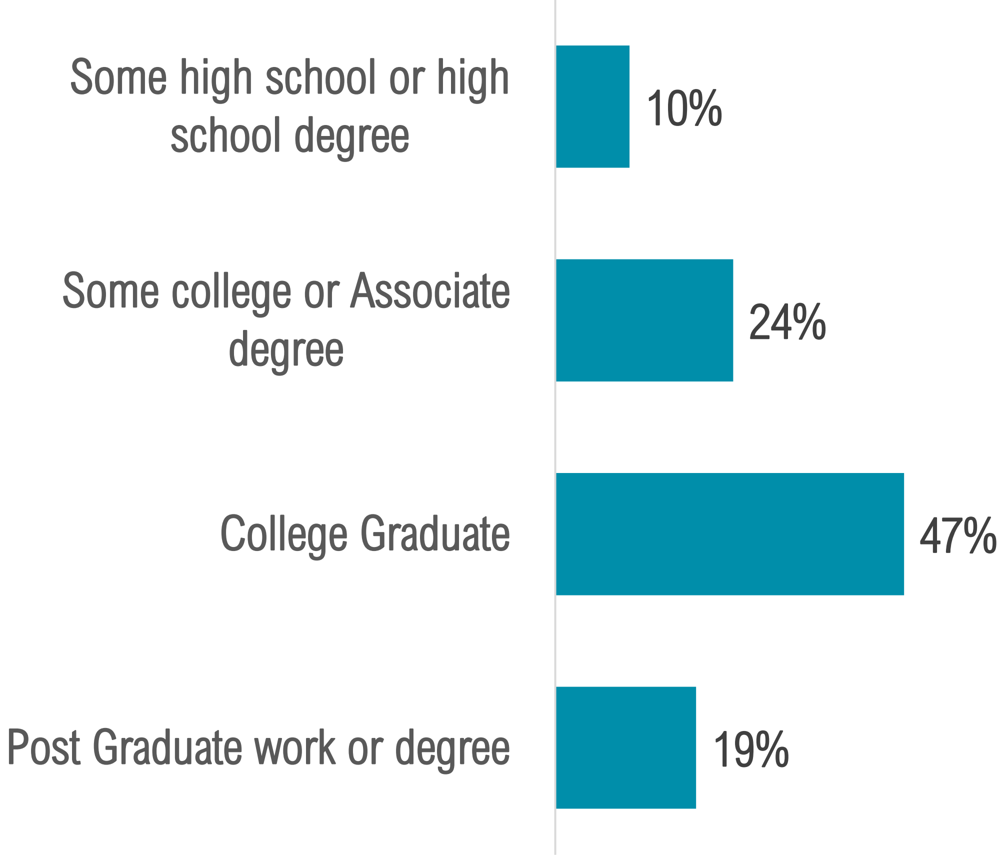
MARITAL STATUS



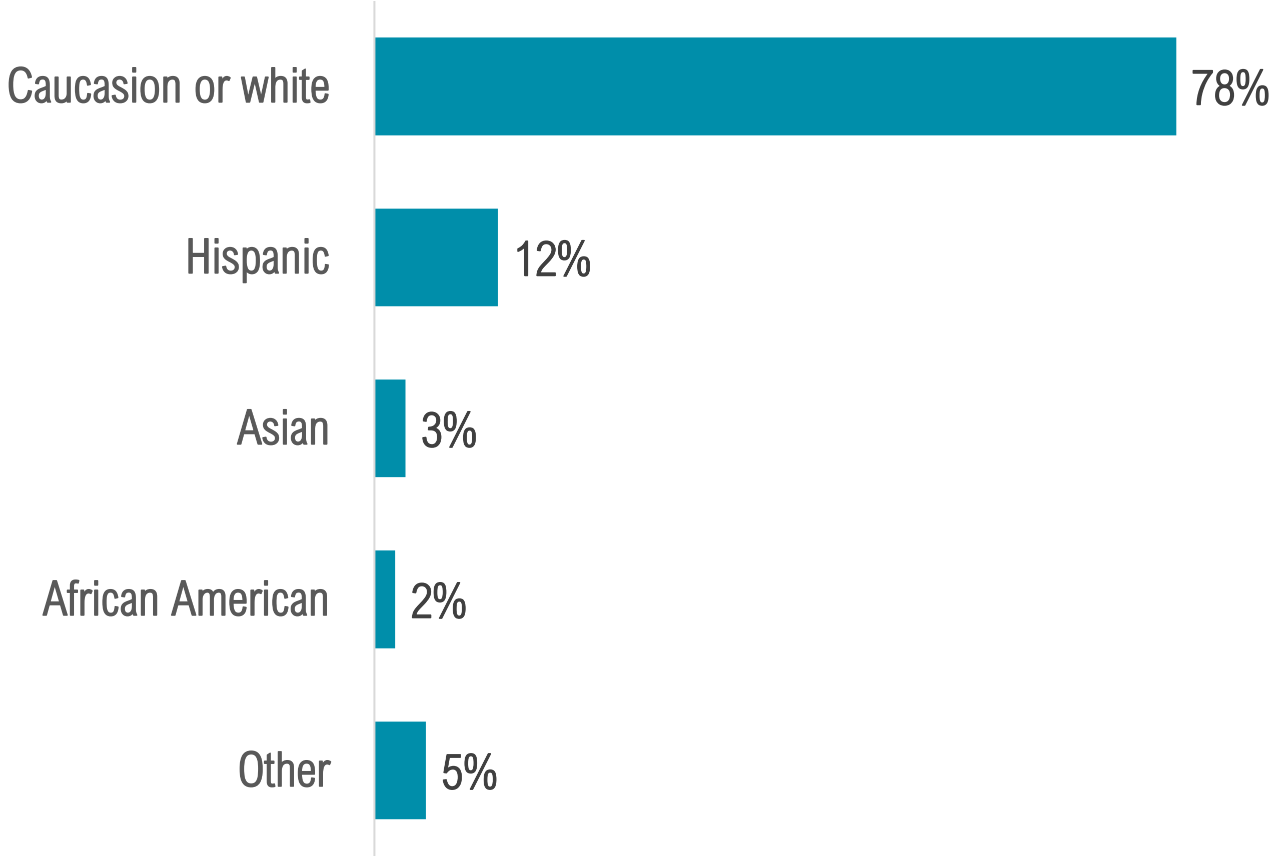
EDUCATION

College Education

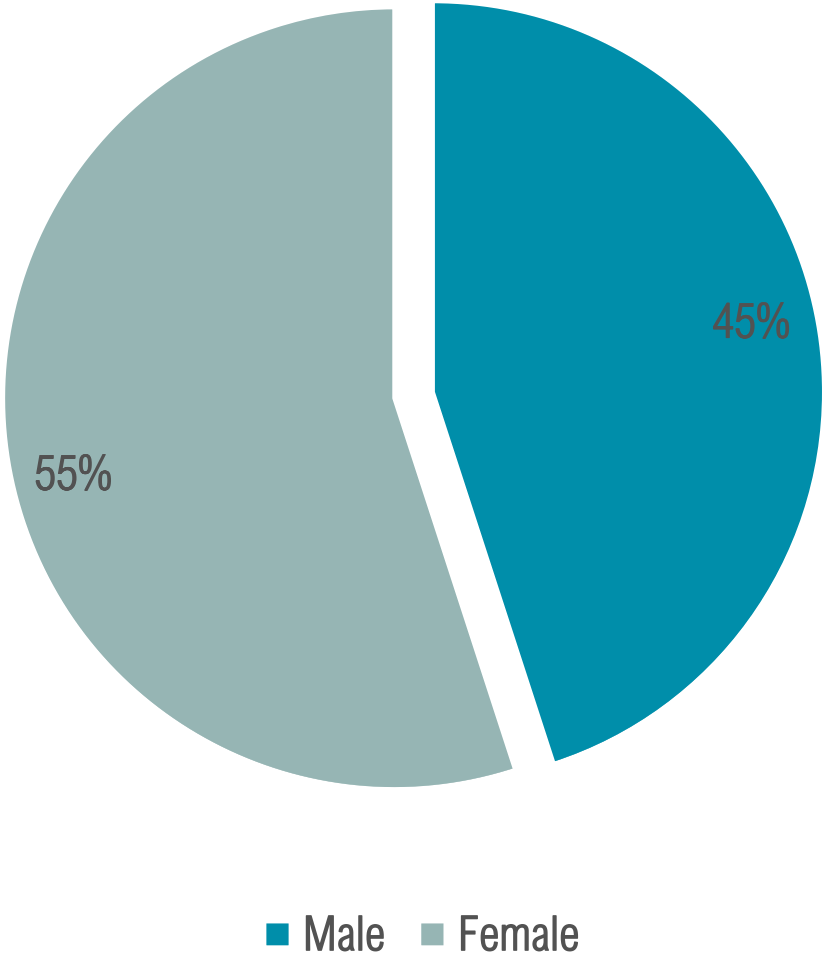
66% of July – September visitors were **college graduates**.



RACE/ETHNICITY



GENDER[1]



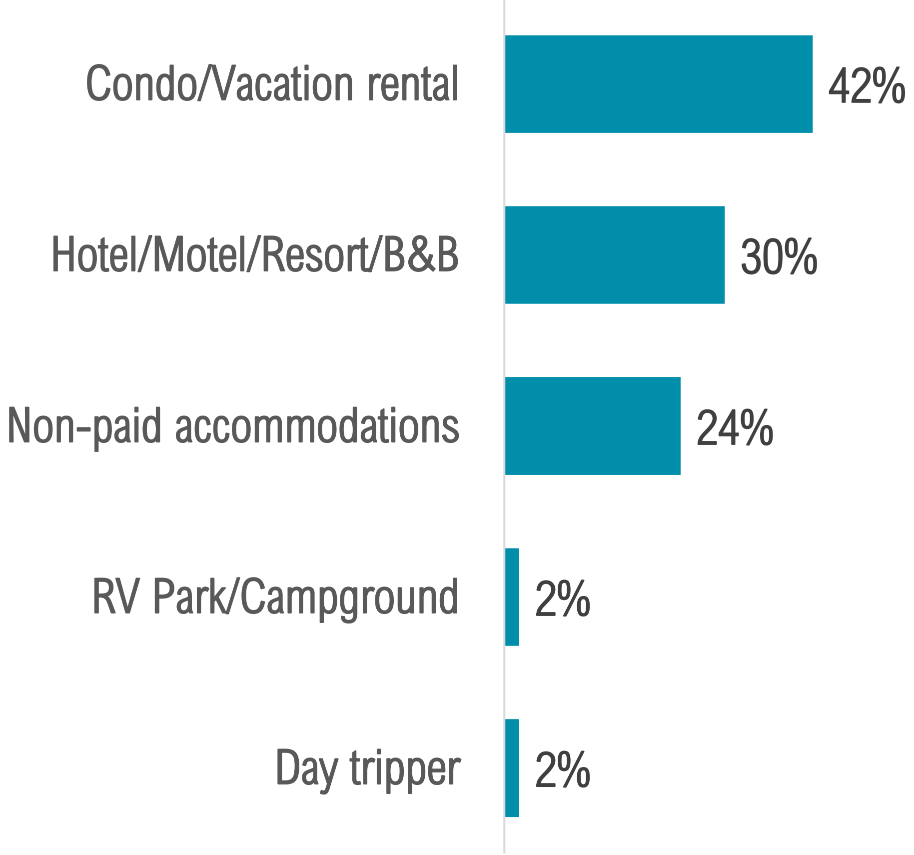
[1]May reflect females' willingness to be interviewed.

VISITOR JOURNEY: TRIP EXPERIENCE

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

ACCOMMODATIONS

Nearly 3 in 4 visitors stayed in **paid accommodations** such as a hotel/motel/resort/B&B, condo/vacation rental, or a RV Park/Campground.



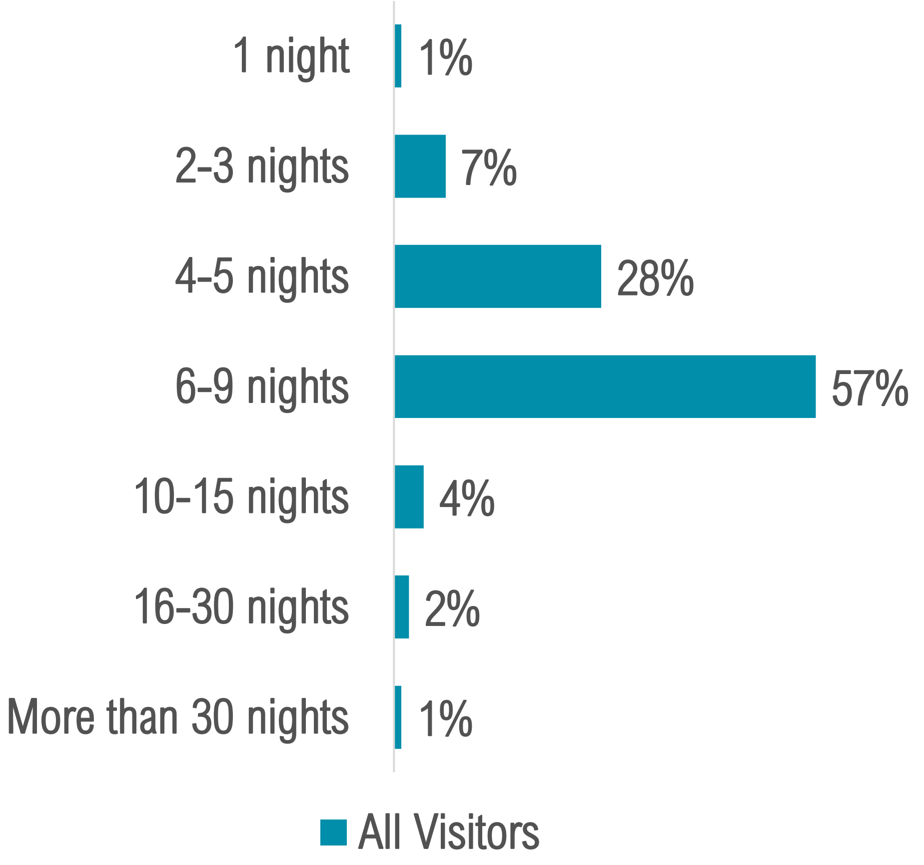
NIGHTS STAYED

All Visitors

Visitors spent **6.4[1] nights** in The Beaches of Fort Myers & Sanibel.

Visitors Staying in Paid Accommodations

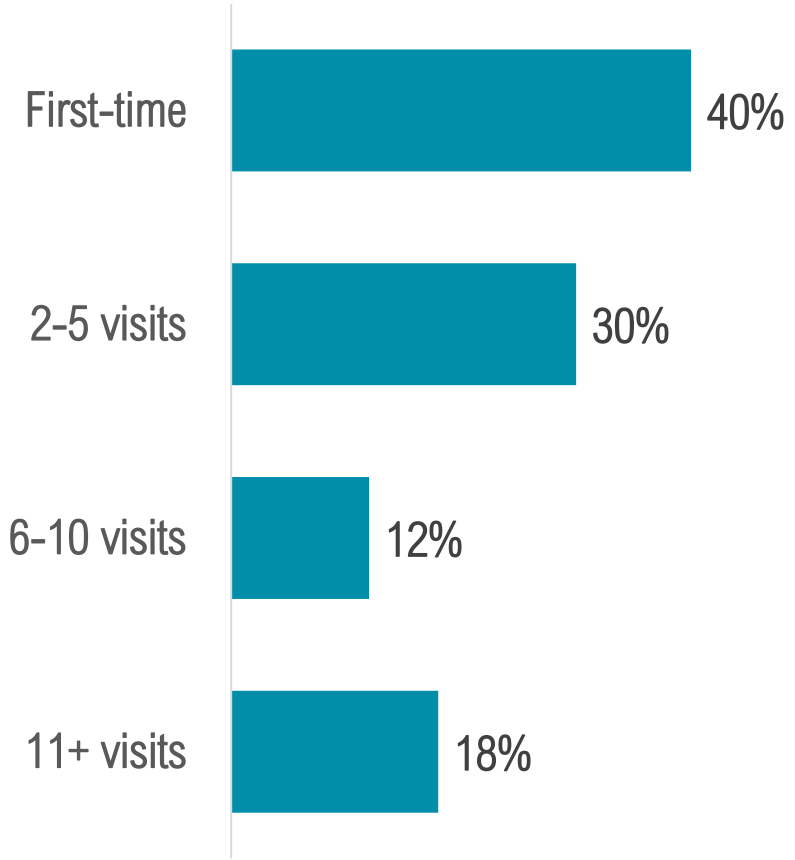
Visitors staying in paid accommodations spent **4.5[2] nights** in The Beaches of Fort Myers & Sanibel.



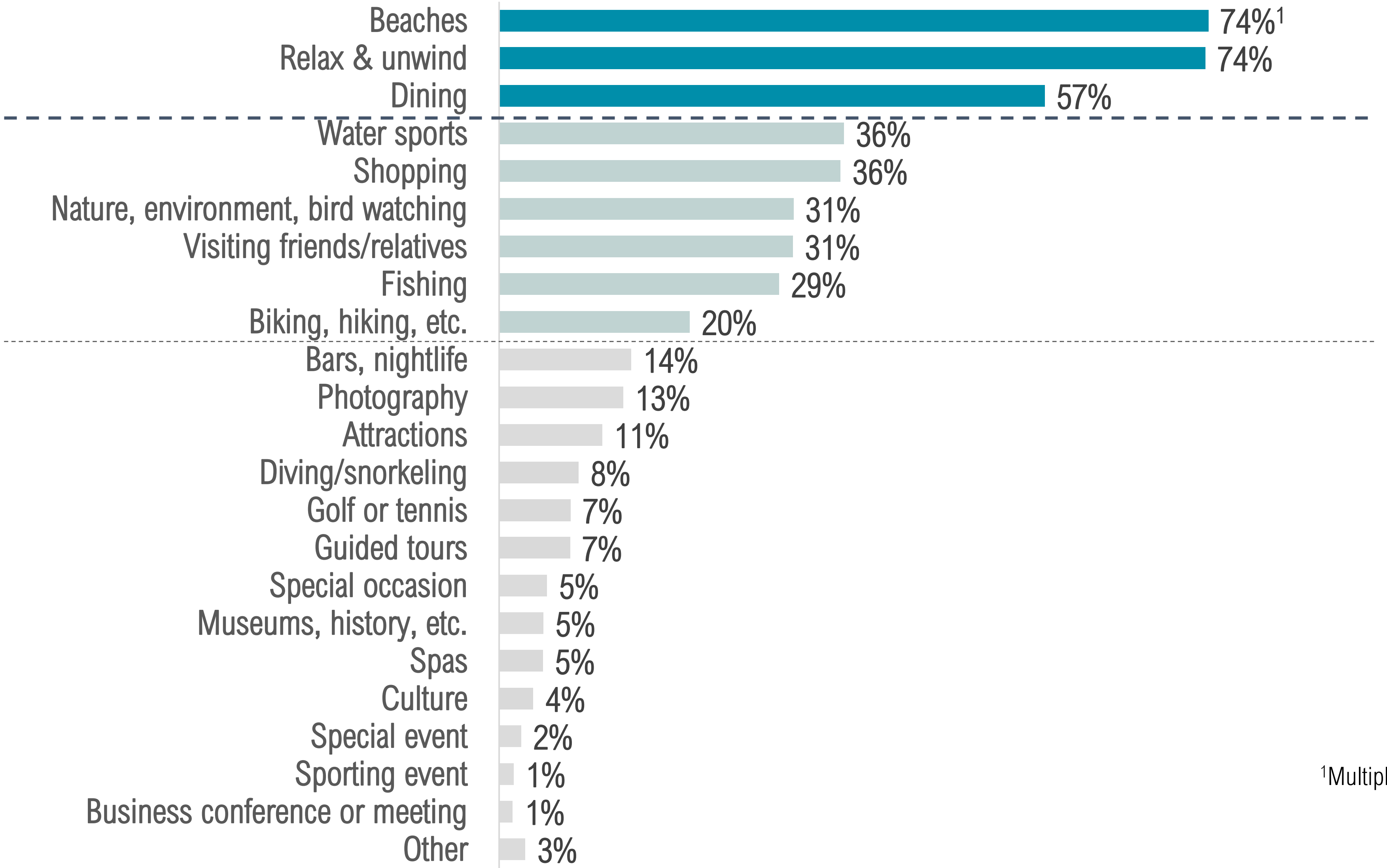
[1] When including extended stay visitors, average nights stayed for all visitors was 9.3 nights.
Source: Visitor Tracking Survey
[2] Source: Occupancy Survey

FIRST TIME AND EXPERIENCED VISITORS

2 in 5 visitors were visiting for the first time, while nearly 1 in 5 were highly loyal visitors, having visited more than 10 times.

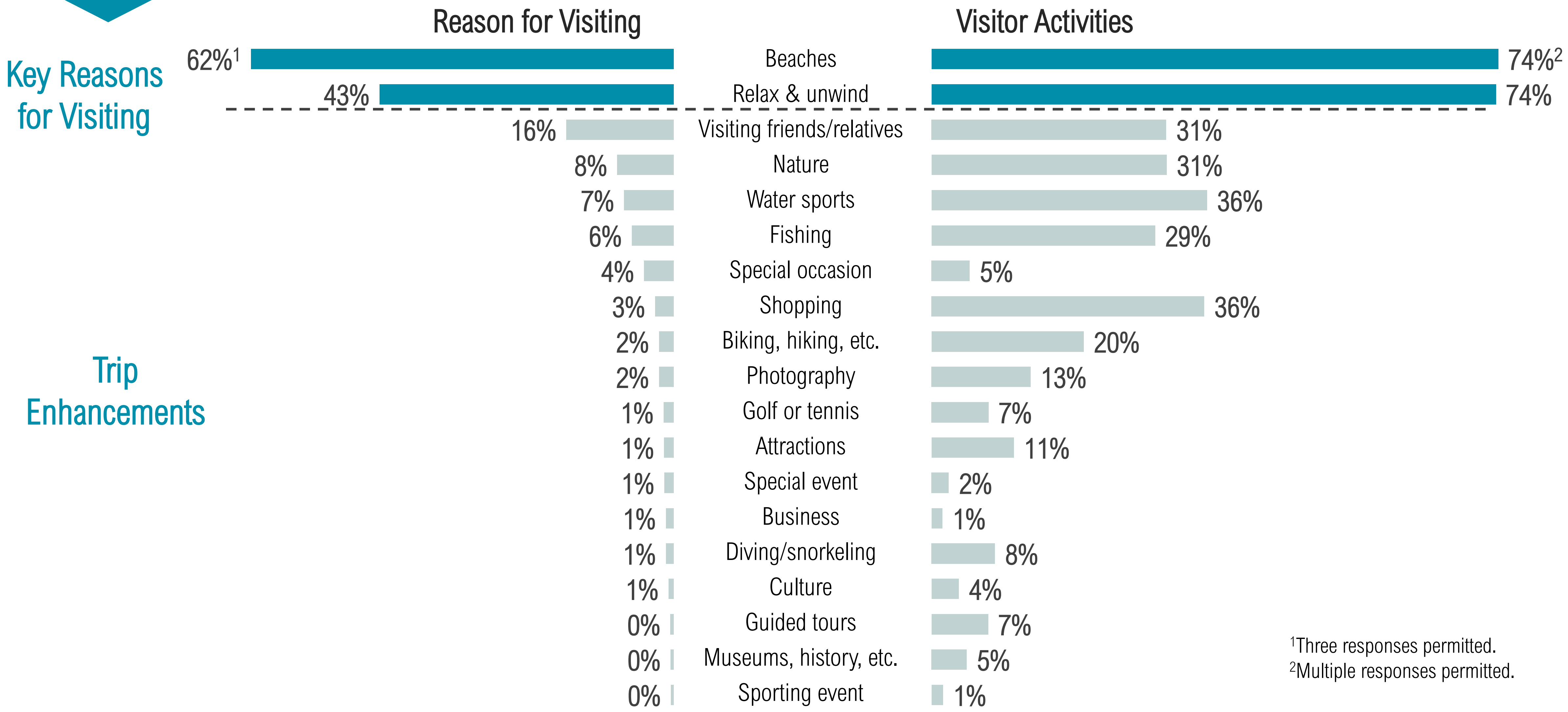


VISITOR ACTIVITIES



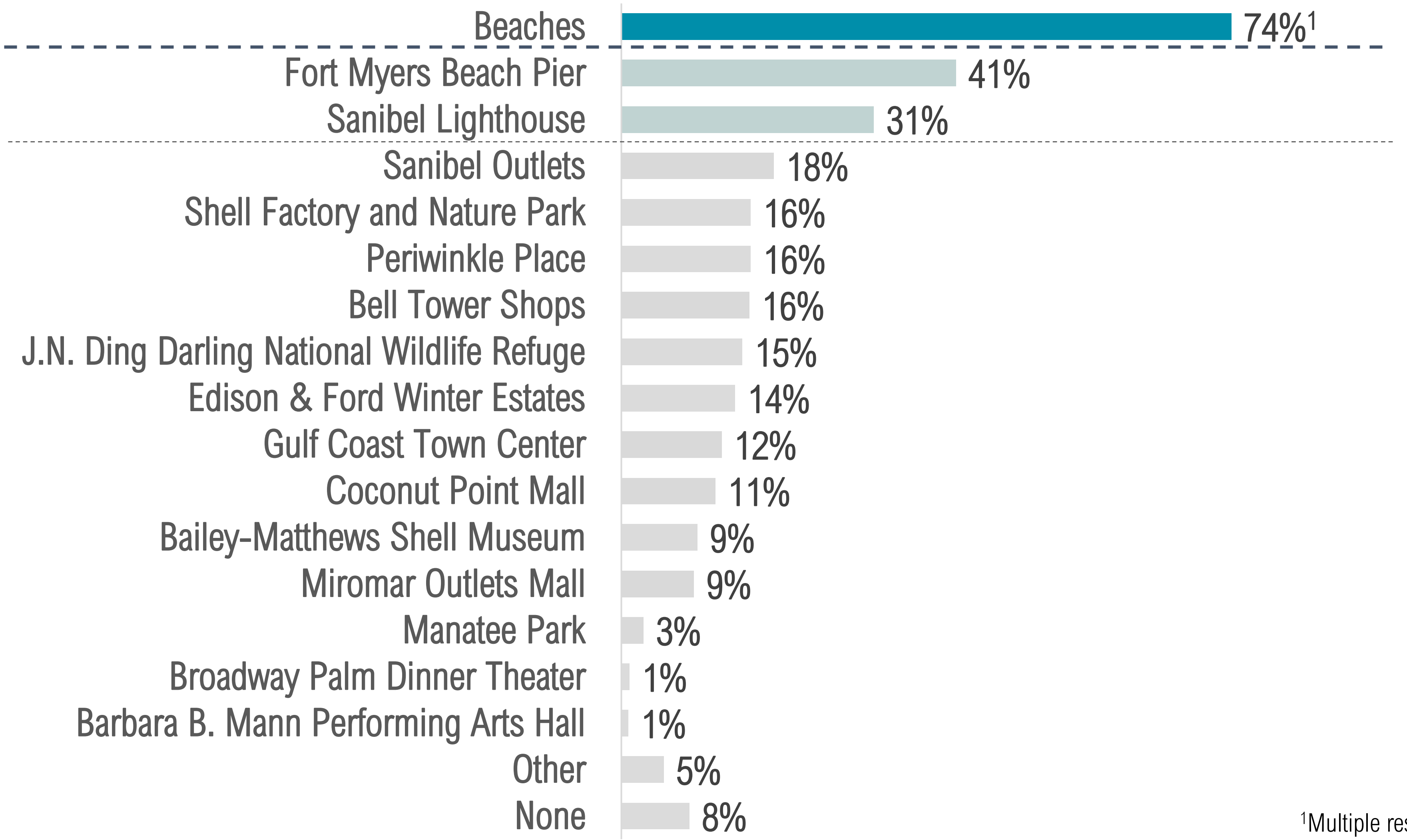
[1]Multiple responses permitted.

REASON FOR VISITING VS. VISITOR ACTIVITIES



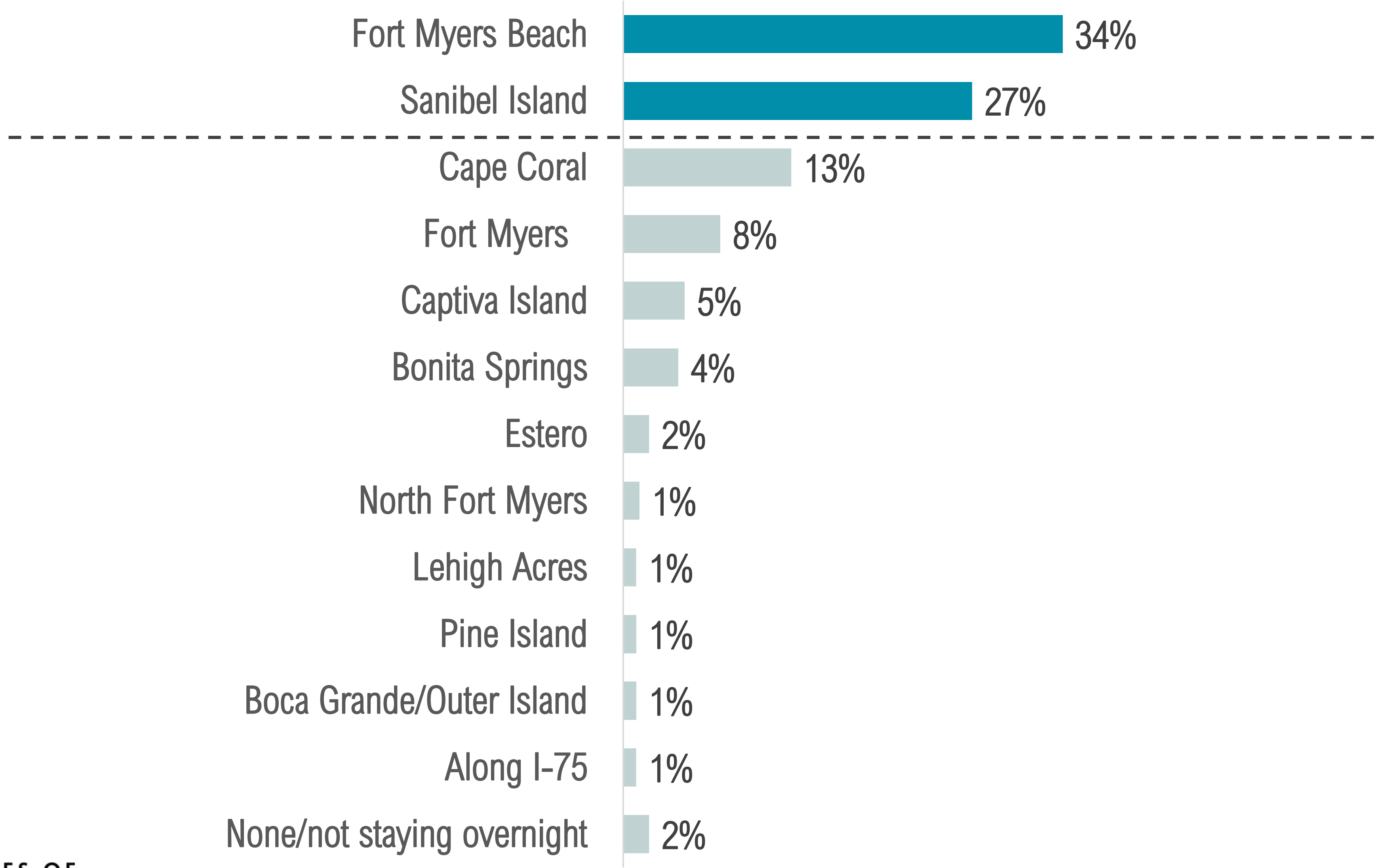
[1]Three responses permitted.
[2]Multiple responses permitted.

ATTRACTIONS VISITED



[1]Multiple responses permitted.

COMMUNITY STAYED

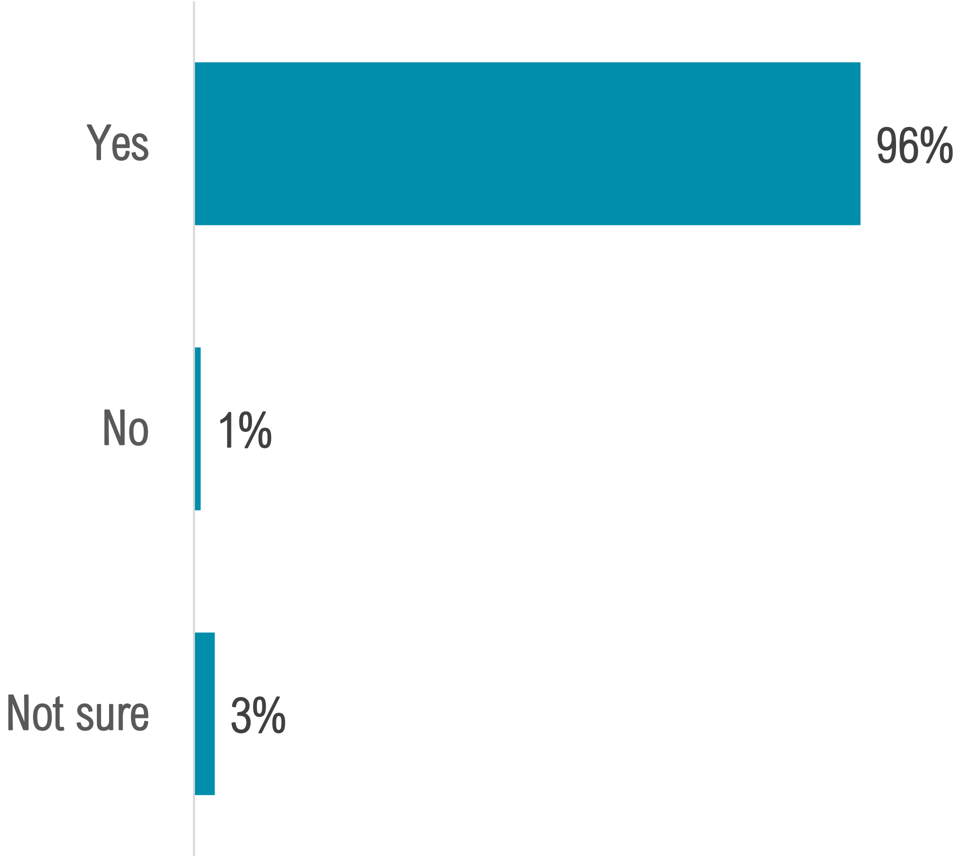


VISITOR JOURNEY: POST-TRIP EVALUATION

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

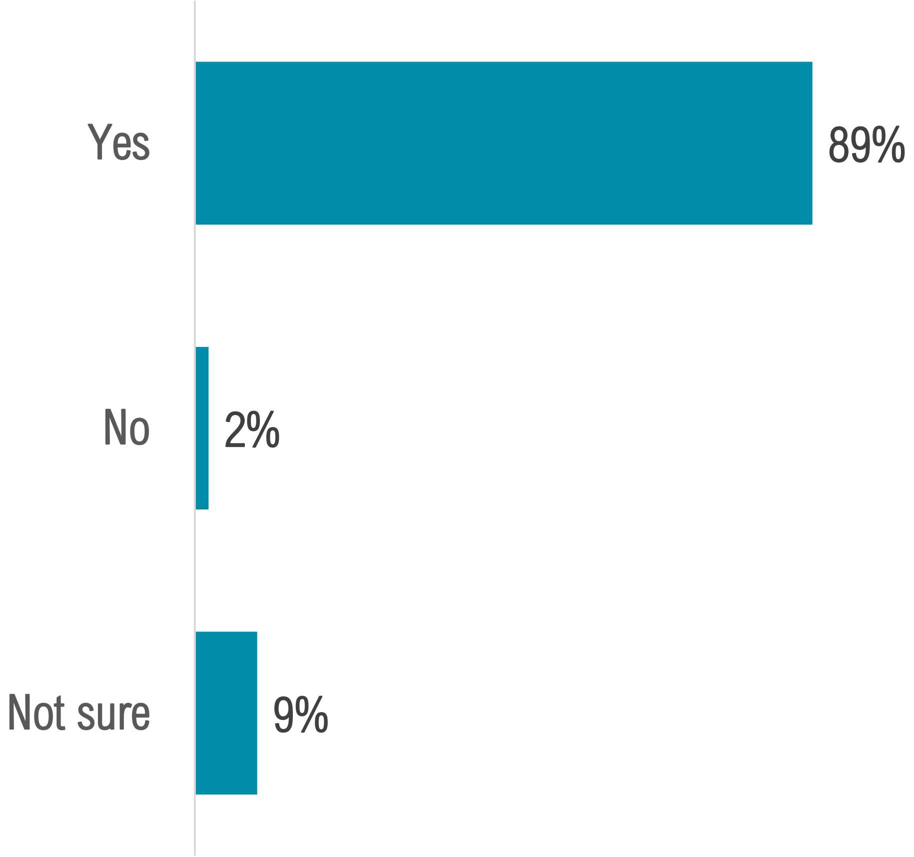
LIKELY TO RECOMMEND

Nearly all visitors are likely to recommend The Beaches of Ft. Myers & Sanibel



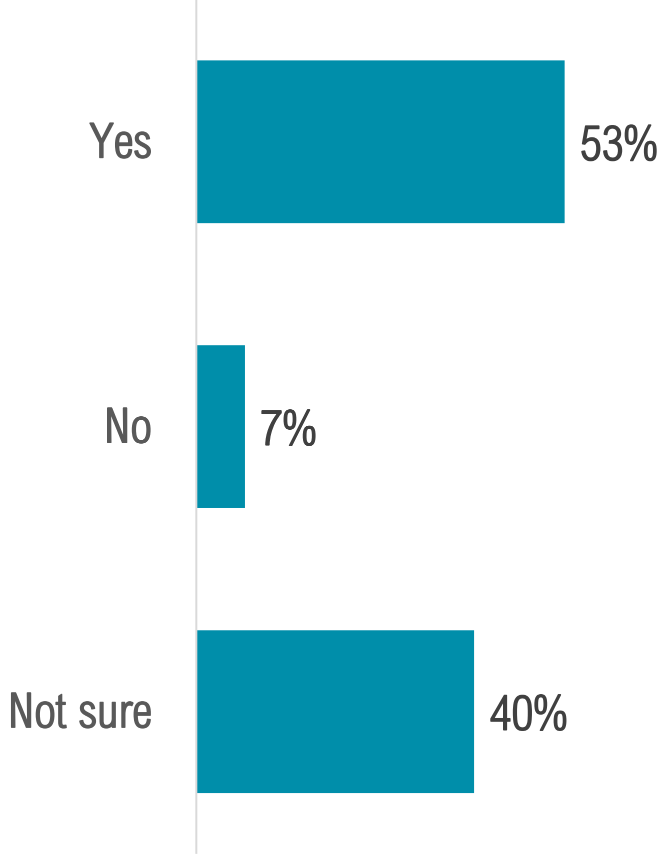
LIKELY TO RETURN

Nearly 9 in 10 visitors are likely to return to The Beaches of Ft. Myers & Sanibel



LIKELY TO RETURN NEXT YEAR

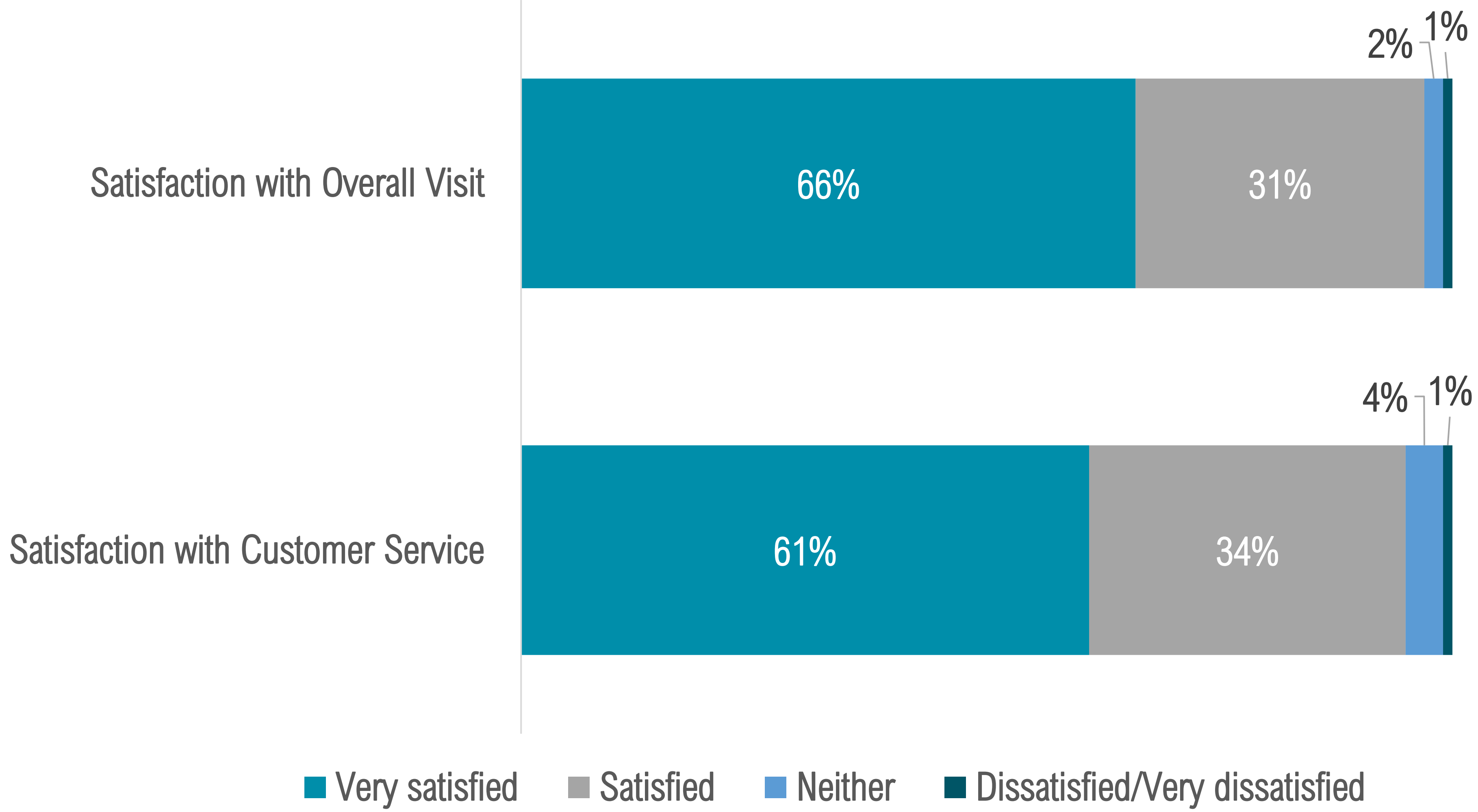
Over half of visitors are likely to return to The Beaches of Ft. Myers & Sanibel next year



SATISFACTION RATINGS

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2020	2021	2020	2021	2020	2021	2020	2021
Likely to Recommend	93%	93%	95%	98%	94%	96%	98%	95%
Likely to Return	90%	83%	95%	94%	95%	90%	94%	80%
Likely to Return Next Year	45%	36%	76%	63%	67%	54%	55%	33%

SATISFACTION



SATISFACTION RATINGS: OVERALL VISIT

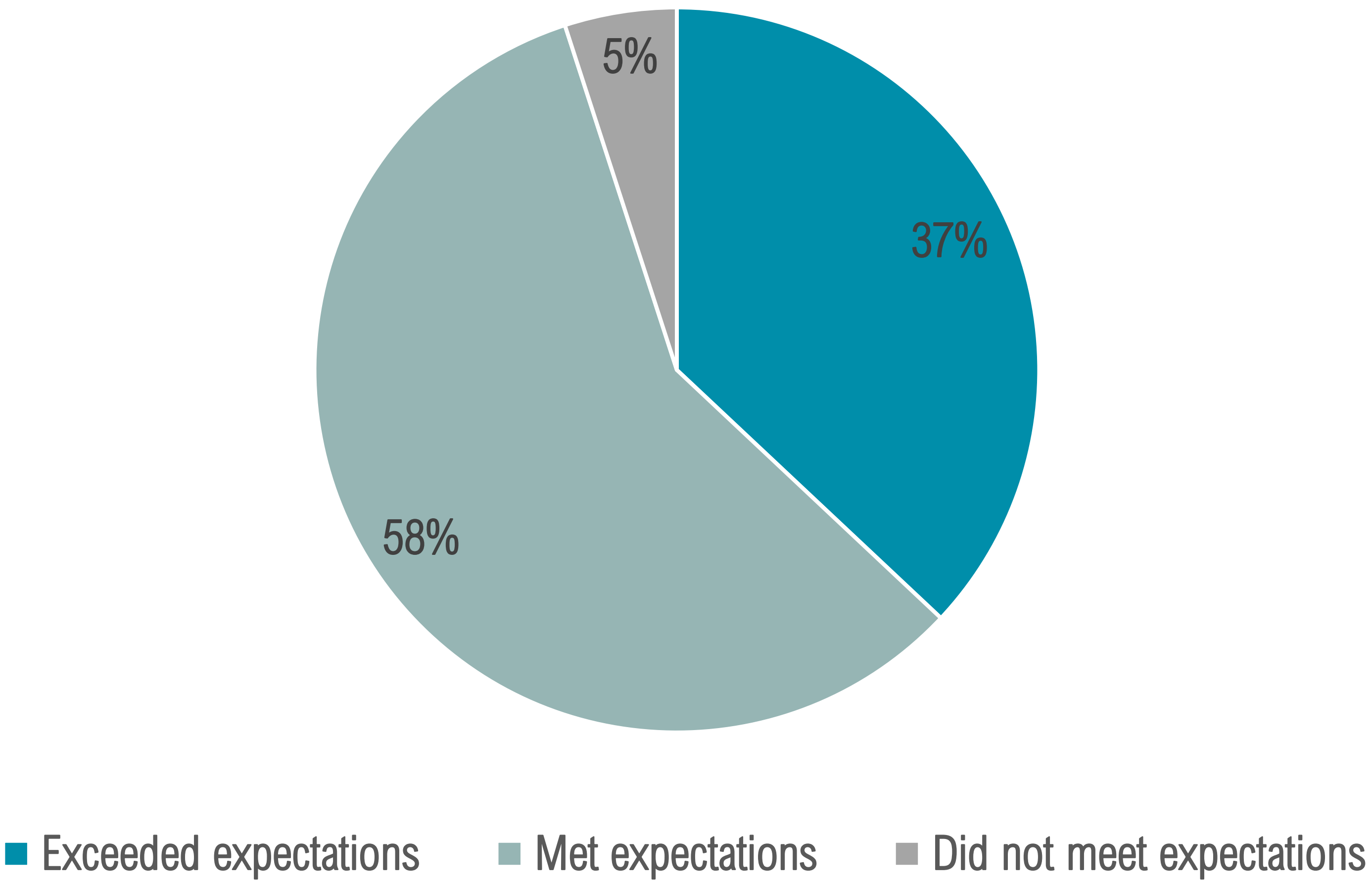
	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2020	2021	2020	2021	2020	2021	2020	2021
Very Satisfied	65%	56%	68%	73%	66%	67%	89%	48%
Satisfied	31%	40%	29%	24%	30%	30%	11%	47%

SATISFACTION RATINGS: CUSTOMER SERVICE

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2020	2021	2020	2021	2020	2021	2020	2021
Very Satisfied	61%	54%	62%	64%	61%	60%	25%	44%
Satisfied	31%	40%	31%	30%	31%	34%	72%	43%

SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

Quality of Accommodations

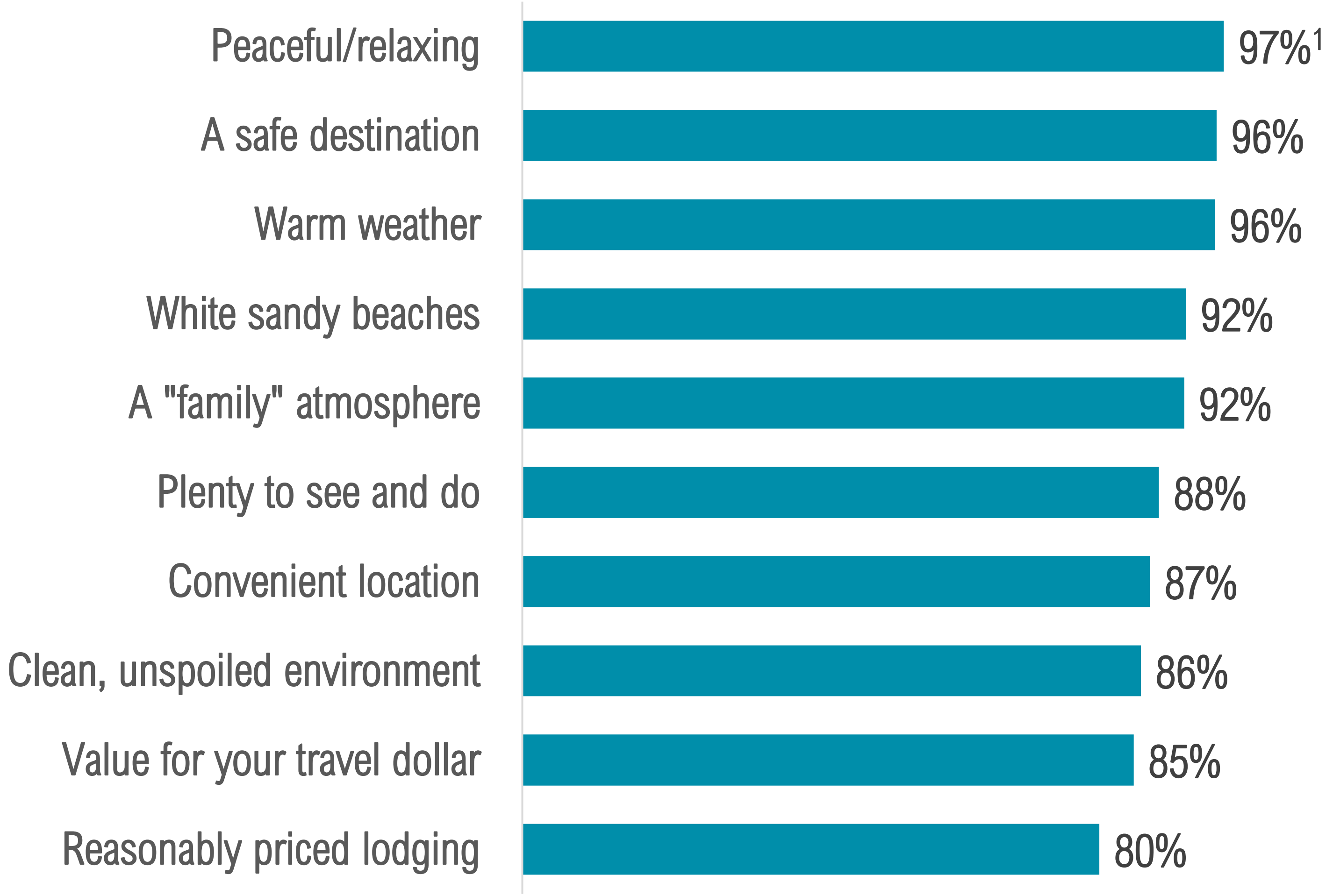


SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2020	2021	2020	2021	2020	2021	2020	2021
Exceeded Expectations	49%	34%	43%	43%	43%	39%	45%	32%
Met Expectations	49%	61%	55%	52%	54%	57%	53%	61%
Did Not Meet Expectations	2%	5%	2%	5%	3%	4%	2%	7%

ATTRIBUTE RATINGS

Over 95% of visitors gave high experience ratings for peace, safety, 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.

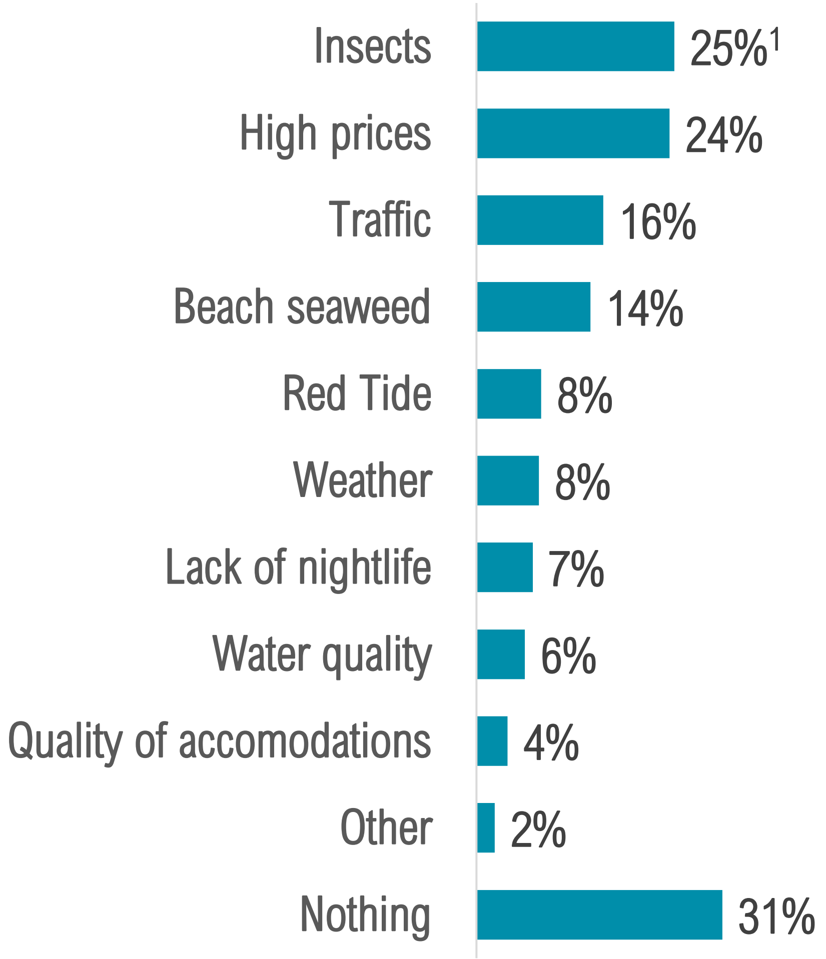
VACATION ATTRIBUTE INFLUENCE VS. RATINGS

Vacation Influencers[1]	Attribute	Fort Myers/Sanibel Ratings[2]
92%	Peaceful/relaxing	97%
91%	A safe destination	96%
88%	Warm weather	96%
87%	Clean, unspoiled environment	86%
87%	White sandy beaches	92%
82%	Convenient location	87%
82%	Plenty to see and do	88%
80%	A "family" atmosphere	92%
80%	Value for your travel dollar	85%
77%	Reasonably priced lodging	80%

[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.

LEAST LIKED FEATURES[2]

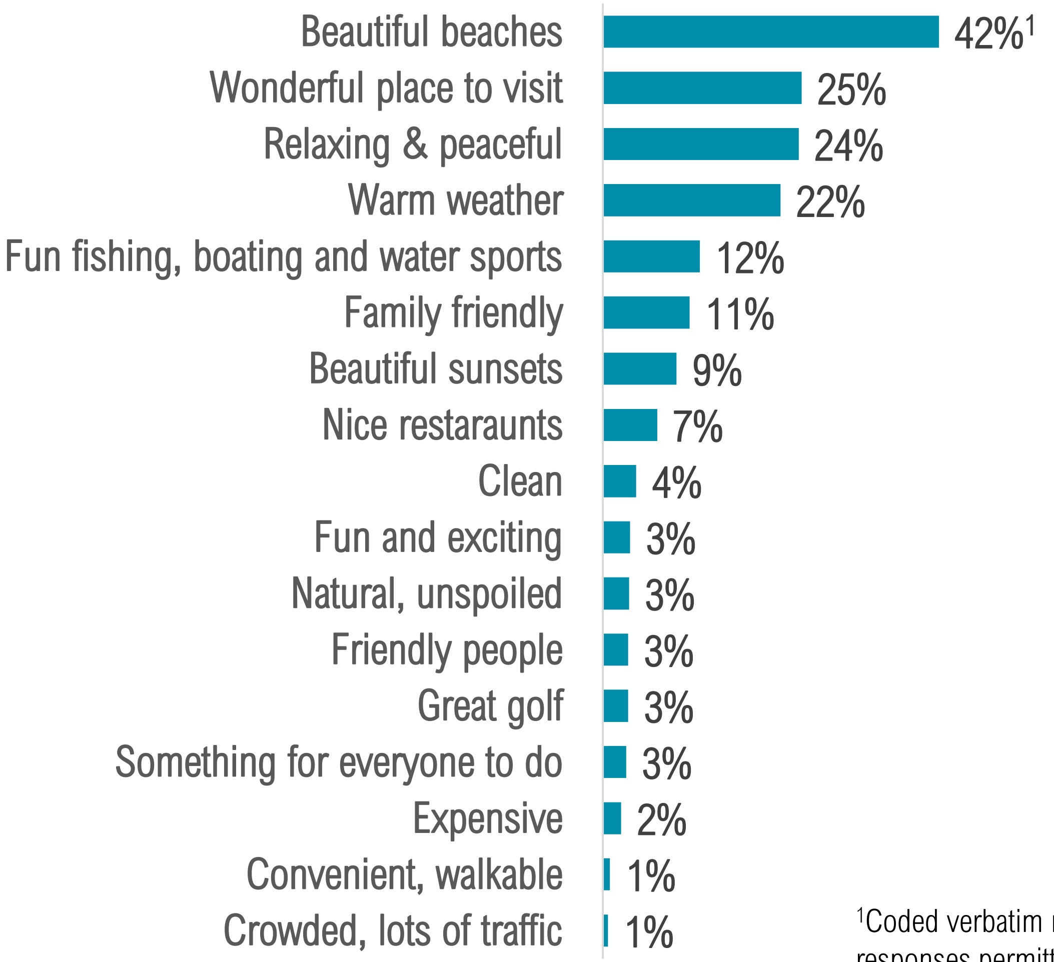
1 in 4 visitors indicated **insects** and **high prices** were the features they least liked during their visit.



[1]Multiple responses permitted.
[2]During this specific visit, which features have you liked LEAST about our area?

AREA DESCRIPTIONS

Visitors describe The Beaches of Fort Myers & Sanibel as having **beautiful beaches** and being a **wonderful place to visit**.



[1]Coded verbatim responses; multiple responses permitted.

AREA DESCRIPTIONS

Beautiful Beaches

- “Beaches are very relaxing and calm compared to beaches at home in the Jersey Shore! They have the best views.”
- “A slice of paradise - beautiful, unspoiled, clean - absolutely wonderful!”
- “Beautiful beaches and landscape, very relaxing and enjoyable. I would also mention there were places to play pickleball!”
- “Beautiful, serene beach with excellent shelling and wildlife. My pics look like they came straight out of National Geographic. Sunsets were stunning. Beach was much more relaxing than places like Madeira.”

Wonderful Place to Visit

- “Perfect vacation; my favorite getaway place.”
- “Our favorite place to vacation.”
- “I can't get to Hawaii but Sanibel is just as good!”
- “Paradise on earth.”
- “Awesome vacation destination. Perfect weather, gorgeous beaches, great fishing and boating.”
- “The only place in Florida to stay.”

AREA DESCRIPTIONS

Relaxing and Peaceful

- “Beautiful, relaxing and clean. A perfect place to see!”
- “Sanibel: Peaceful, beautiful, amazing seashells, great restaurants, a fantastic island to visit!”
- “Quiet, relaxing, beautiful and sometimes great shelling, great restaurants, beautiful flowers and plants. Perfect place for unwinding.”
- “Beautiful, relaxing, great nature and lovely sunsets.”
- “Very laid back family atmosphere. Not at all commercialized. Calm and safe water for young swimmers.”

Warm Weather

- “It’s beautiful, warm and relaxing. People are great and welcoming. A real family place.”
- “Warm water; white sand; friendly and super people.”
- “Awesome vacation, perfect weather, tropical atmosphere.”
- “Beautiful white sandy beaches and pretty blue water, amazing weather and was able to relax.”
- “Wonderful golf courses, beautiful weather, gorgeous beaches.”

OCCUPANCY BAROMETER: OCTOBER – DECEMBER RESERVATIONS

Oct – Dec Reservations	July – Sept 2020	July – Sept 2021
Up	1%	82%
Same	18%	9%
Down	79%	7%
Not Sure	2%	2%

OCCUPANCY BAROMETER: JANUARY – MARCH RESERVATIONS

Jan – Mar Reservations	July – September 2020	July – September 2021
Up	3%	70%
Same	20%	14%
Down	73%	13%
Not Sure	4%	3%

Year-Over-Year Comparisons

ECONOMIC IMPACT

Visitor & Lodging Statistics	July - Sept 2019	July - Sept 2020	July – Sept 2021	% Change '19 – '21
Visitors	1,102,500	752,400	1,162,800	+5.5%
Room Nights	975,200	846,900	1,294,000	+32.7%
Direct Expenditures	$548,970,200	$500,650,800	$767,613,500	+39.8%
Total Economic Impact	$891,527,600	$813,056,900	$1,223,575,900	+37.2%
Occupancy	45.6%	39.7%	55.8%	+22.4%
ADR	$122.54	$127.24	$139.36	+13.7%
RevPAR	$55.93	$50.51	$77.82	+39.1%

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM

	July – Sept 2019	July – Sept 2020	July – Sept 2021	% Change '19-'21
Direct Jobs	7,378	6,529	10,317	+39.8%
Total Jobs	10,317	9,110	14,162	+37.3%
Direct Wages	$165,493,000	$146,615,200	$231,109,400	+39.6%
Total Wages	$276,479,600	$245,104,600	$379,535,100	+37.3%
Direct Local Taxes	$16,743,600	$15,169,700	$23,412,200	+39.8%
Total Local Taxes	$30,133,600	$27,074,800	$41,356,900	+37.2%
Direct State Taxes	$39,031,800	$35,045,600	$54,577,300	+39.8%
Total State Taxes	$58,395,100	$52,035,600	$80,144,200	+37.2%

VISITOR TYPE

Visitor Type	July – September 2020	July – September 2021
Visitors in Paid Accommodations	72%	74%
Visitors in Non-Paid Accommodations	26%	24%
Day Trippers	2%	2%

PRE-VISIT

Planned trip in advance	July – September 2020	July – September 2021
1 week or less	6%	6%
2-4 weeks	17%	9%
1-2 months	35%	35%
3-6 months	26%	34%
6 months or more	16%	17%

Considered Other Destinations	July – September 2020	July – September 2021
Yes	12%	36%
No	88%	64%

PRE-VISIT

Trip Planning Websites/Apps[1]	July – September 2020	July – September 2021
Search engines	31%	36%
Airbnb, VRBO, HomeAway	21%	30%
Airline websites	22%	22%
Booking websites	22%	20%
Travel reviews, blogs, stories, etc.	10%	16%
Trip Advisor	20%	15%
Hotel websites	17%	15%
Vacation rental websites	16%	15%
VCB Social Media	13%	8%
www.FortMyers-Sanibel.com	12%	8%
Facebook	11%	7%
Visit Florida	10%	5%
Instagram	8%	3%
YouTube, Hulu, Pandora	6%	3%
Other	3%	5%
None/Don't visit websites	10%	16%

[1]Multiple responses permitted.

PRE-VISIT

Information Requests[1]	July – September 2020	July – September 2021
Call hotel/motel/condo	31%	30%
Visitor guide	19%	8%
Call VCB	16%	2%
Fort Myers-Sanibel E-newsletter	19%	1%
Call local Chamber of Commerce	15%	1%
Other	3%	3%
None/Did not request info	46%	63%

[1]Multiple responses permitted.

PRE-VISIT

Recall of Lee County Promotions	July – September 2020	July – September 2021
Yes	36%	42%
No	43%	44%
Can't recall	20%	14%

Characteristics influencing visit to Lee County (top 2 boxes)	July – September 2020	July – September 2021
Peaceful/relaxing	96%	92%
A safe destination	92%	91%
Warm weather	82%	88%
Clean, unspoiled	91%	87%
White sandy beaches	87%	87%
Convenient location	83%	82%
Plenty to see and do	80%	82%
A "family" atmosphere	80%	80%
Value for your travel dollar	79%	80%
Reasonably priced lodging	78%	77%

PRE-VISIT

Transportation	July – September 2020	July – September 2021
Fly	55%	75%
Drive a personal vehicle	41%	21%
Drive a rental vehicle	2%	2%
Drive a RV	1%	1%
Travel by bus	0%	1%
Other	1%	0%

Airport Used	July – September 2020	July – September 2021
Southwest Florida International	86%	85%
Punta Gorda	9%	5%
Miami International	1%	3%
Tampa International	1%	3%
Orlando International	1%	2%
Ft. Lauderdale International	1%	2%
Other	1%	0%

TRAVEL PARTY PROFILE

Visitor Origin	July – September 2020	July – September 2021
Florida	18%	10%
Southeast	20%	18%
Northeast	19%	16%
Midwest	37%	41%
West	5%	9%
Canada	<1%	4%
United Kingdom	1%	0.2%
Germany	<1%	0.2%
Other Europe	<1%	0.6%
Other international	<1%	1%

TRAVEL PARTY PROFILE

Travel Parties	July – September 2020	July – September 2021
Mean travel party size[1]	3.8	3.8
Travel with children under age 18	38%	49%

Travel Party Composition	July – September 2020	July – September 2021
Family	48%	60%
Couple	30%	26%
Group of couples/friends	9%	8%
Single	9%	4%
With business associates	3%	1%
In a tour group	1%	1%

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

TRAVEL PARTY PROFILE

Marital Status	July – September 2020	July – September 2021
Married	75%	72%
Single	25%	28%

Age	July – September 2020	July – September 2021
Average age	47	49

Household Income	July – September 2020	July – September 2021
Median Income	$111,300	$106,300

TRIP EXPERIENCE

Length of Stay	July – September 2020	July – September 2021
Average nights in The Beaches of Fort Myers & Sanibel	8.7[1]	6.4

First time/Repeat Visitors	July – September 2020	July – September 2021
First-time	27%	40%
Repeat	73%	60%

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

TRIP EXPERIENCE

Activities[1]	July – September 2020	July – September 2021
Beaches	69%	74%
Relax & unwind	55%	74%
Dining	45%	57%
Shopping	32%	36%
Water sports	23%	36%
Nature, environment, bird watching	29%	31%
Visiting friends/relatives	23%	31%
Fishing	18%	29%
Biking, hiking etc.	16%	20%
Bars, nightlife	13%	14%
Photography	12%	13%
Attractions	12%	11%
Diving/snorkeling	7%	8%
Golf or tennis	9%	7%
Guided tours	7%	7%
Museums, history, etc.	7%	5%
Special occasion	6%	5%
Spas	6%	5%
Culture	6%	4%
Special event	5%	2%
Sporting event	5%	1%
Business conference or meeting	4%	1%
Volunteering	3%	0%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Attractions[1]	July – September 2020	July – September 2021
Beaches	69%	74%
Fort Myers Beach Pier	33%	41%
Sanibel Lighthouse	33%	31%
Sanibel Outlets	19%	18%
Shell Factory and Nature Park	11%	16%
Periwinkle Place	10%	16%
Bell Tower Shops	7%	16%
J.N. Ding Darling National Wildlife Refuge	13%	15%
Edison & Ford Winter Estates	12%	14%
Gulf Coast Town Center	8%	12%
Coconut Point Mall	8%	11%
Miromar Outlets Mall	14%	9%
Bailey-Matthews Shell Museum	3%	9%
Manatee Park	8%	3%
Broadway Palm Dinner Theater	2%	1%
Barbara B. Mann Performing Arts Hall	2%	1%
None	7%	8%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Area stayed	July – September 2020	July – September 2021
Fort Myers Beach	24%	34%
Sanibel Island	24%	27%
Cape Coral	15%	13%
Fort Myers	15%	8%
Captiva Island	3%	5%
Bonita Springs	5%	4%
Estero	4%	2%
North Fort Myers	3%	1%
Lehigh Acres	2%	1%
Along I-75	1%	1%
Boca Grande/Outer Island	1%	1%
Pine Island	1%	1%

POST-TRIP EVALUATION

Loyalty metrics	July – September 2020	July – September 2021
Likely to recommend	94%	96%
Likely to return	94%	89%
Likely to return next year	66%	53%

Satisfaction with Accommodations	July – September 2020	July – September 2021
Exceeded expectations	43%	37%
Met expectations	55%	58%
Did not meet expectations	2%	5%

POST-TRIP EVALUATION

Satisfaction with Visit	July – September 2020	July – September 2021
Very satisfied	64%	66%
Satisfied	32%	31%
Neither	2%	2%
Dissatisfied/Very dissatisfied	1%	1%

Satisfaction with Customer Service	July – September 2020	July – September 2021
Very satisfied	61%	61%
Satisfied	32%	34%
Neither	4%	4%
Dissatisfied/Very dissatisfied	1%	1%

POST-TRIP EVALUATION

Least Liked Features[1]	July – September 2020	July – September 2021
Insects	35%	25%
High prices	14%	24%
Traffic	21%	16%
Beach seaweed	20%	14%
Weather	14%	8%
Red Tide	8%	8%
Lack of nightlife	13%	7%
Water quality	17%	6%
Quality of accommodations	11%	4%
Other	3%	2%
No concerns	22%	31%

[1]During this specific visit, which features have you liked LEAST about our area? Multiple responses permitted.

Methodology

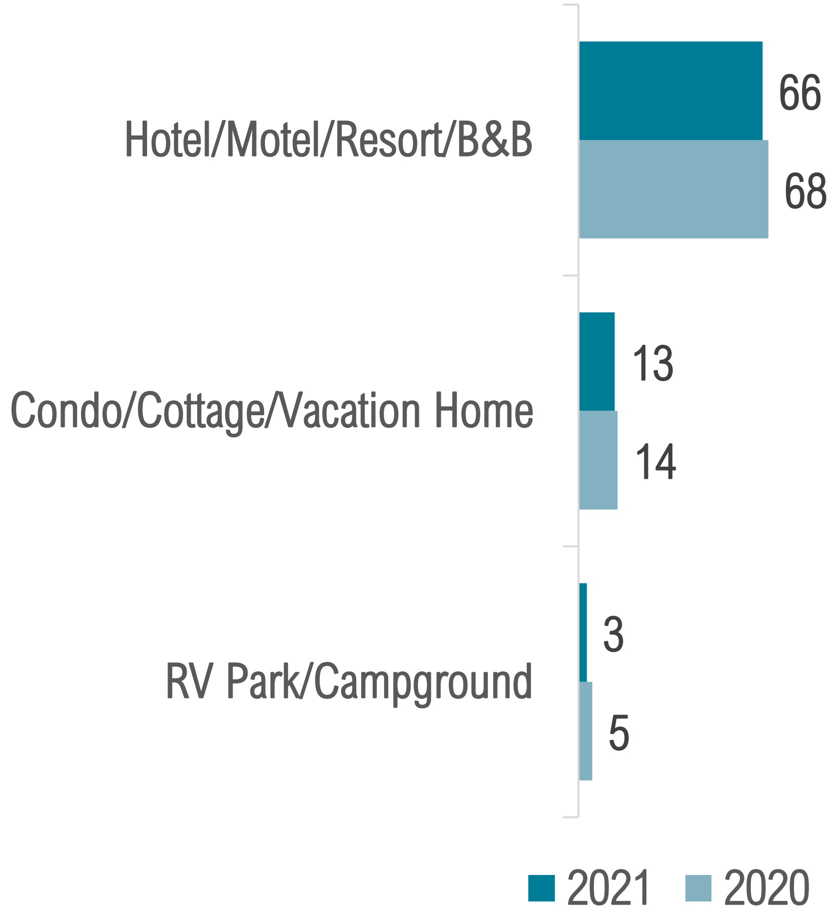
METHODOLOGY

- 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: 902 completed interviews
    - Target individuals: July – September visitors to Lee County
    - Data Collection: July 2021 – September 2021
  - Occupancy Study
    - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc., and the STR Report
    - Sample Size – data from 8,649 hotel/rental/campground units (82 properties) reporting to DSG, 10,394 hotel units reporting to STR (86 properties), and 17,566 rental unit listings on Key Data
  - 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 – 82 completed interviews
    - Data Collection: October 2021 (for July – September 2021)
  - Total Sample Size – data from 8,649 hotel/rental/campground units reporting to DSG, 10,394 hotel units reporting to STR (representing 86 properties), and 17,566 rental unit listings on Key Data

Number of Interviews



METHODOLOGY

- 902 visitor interviews were completed in the following areas:

229	Fort Myers Beach: The Pier, Times Square
344	Fort Myers: Centennial Park, RSW, Edison-Ford Winter Estates, Hampton Inn & Suites Fort Myers
190	Sanibel: Lighthouse Beach, Sanibel Moorings Resort
115	Cape Coral/North Fort Myers: Yacht Club Community Park
24	Bonita Springs: Bonita Beach, Estero

The Beaches of Fort Myers & Sanibel

Lee County VCB

July – September 2021
Visitor Tracking & Occupancy Study

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