The Beaches of Fort Myers & Sanibel

Lee County VCB

January – March 2019
Visitor Tracking & Occupancy Study

THE BEACHES OF
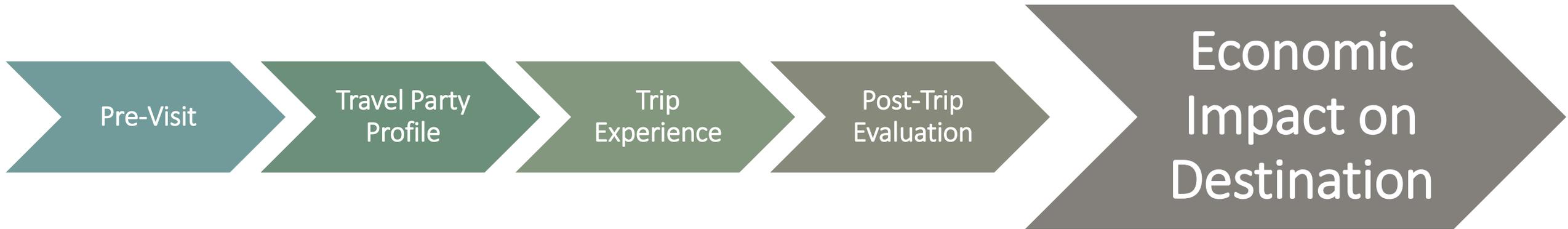FORT MYERS
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Introduction

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

January – March 2019

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Executive Summary

Visitor Journey: Economic Impact on Destination

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

January – March 2019

Tourism Snapshot: January – March 2019[1]

Visitor & Lodging Statistics	Jan – March 2018	Jan – March 2019	% Change
Visitors	1,367,100	1,311,900	-4.0%
Room Nights	1,800,600	1,848,200	+2.6%
Direct Expenditures[2]	$1,191,982,100	$1,251,828,600	+5.0%
Total Economic Impact[3]	$1,935,778,900	$2,032,969,600	+5.0%

[1] Year-over-year differences due to:
1. longer length of stay in 2019,
2. more available inventory in 2019,
3. 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.

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Changes in Tourism Metrics: Jan – Mar 2017 - 2019

Visitor & Lodging Statistics	Jan – Mar 2018 vs. 2017	Jan – Mar 2019 vs. 2018	Jan – Mar 2019 vs. 2017[1]
Visitors	+3.3%	-4.0%	-0.9%
Room Nights	+7.3%	+2.6%	+10.1%
Direct Expenditures[2]	+3.9%	+5.0%	+9.1%
Total Economic Impact[3]	+3.9%	+5.0%	+9.1%

[1]Annual change from 2017 to 2019.
[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.

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Tourism Snapshot: Calendar Year-to-Date 2019[1]

Visitor & Lodging Statistics	CYTD 2018	CYTD 2019	% Change
Visitors	1,367,100	1,311,900	-4.0%
Room Nights	1,800,600	1,848,200	+2.6%
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January – March Lodging Statistics

86.3%
Occupancy
▼ 2.8%

$213.96[1]
ADR
▲ 24.2%

$188.01[1]
RevPAR
▲ 22.9%

[1]Adjusted from original report to reflect updated occupancy figures

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Visitor Journey: Pre-Visit

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

January – March 2019
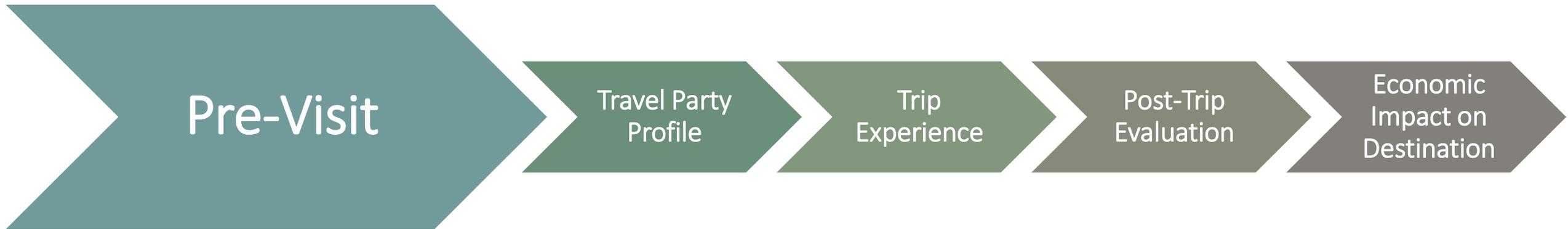
Trip Planning

→ **2 in 3** 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

→ **2 in 10** visitors considered choosing other destinations when planning their trips

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Trip Planning: Websites Used

→ **7 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]:

24% Airline websites

20% Search engines
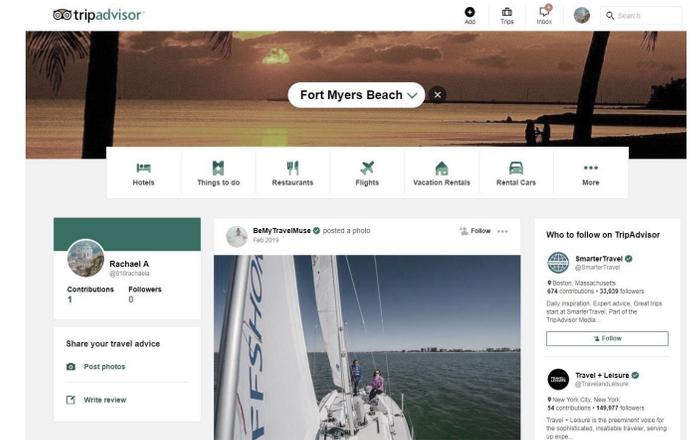
18% Trip Advisor

[1]Multiple responses permitted.

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Top Trip Influencers

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

92% Warm weather

86% Peaceful/relaxing

80% 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.

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Top Reasons for Visiting

→ Visitors' top reasons for visiting The Beaches of Fort Myers & Sanibel include[1]:

46% Beach

44% Relax & unwind

41% Vacation

31% Visit friends & relatives

[1]Three responses permitted.

Promotions

→ **35%** of visitors recalled promotions in the past 6 months for The Beaches of Fort Myers & Sanibel

→ Top sources of recall include[1]:

42% TV

32% Social media

30% Internet

[1]Multiple responses permitted.

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Booking

→Visitors used the following to book their trips:

35% Directly with hotel/condo

14% VRBO, HomeAway
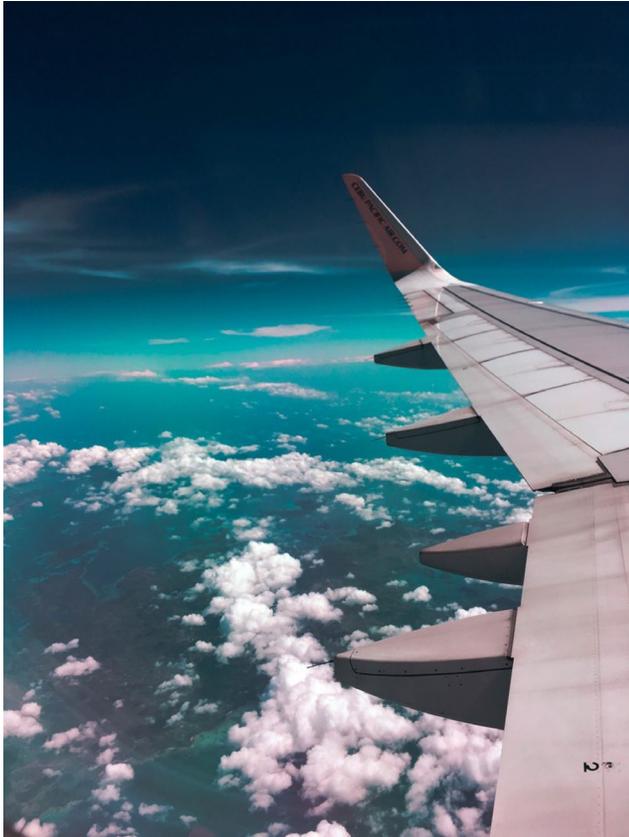
12% Vacation rental company
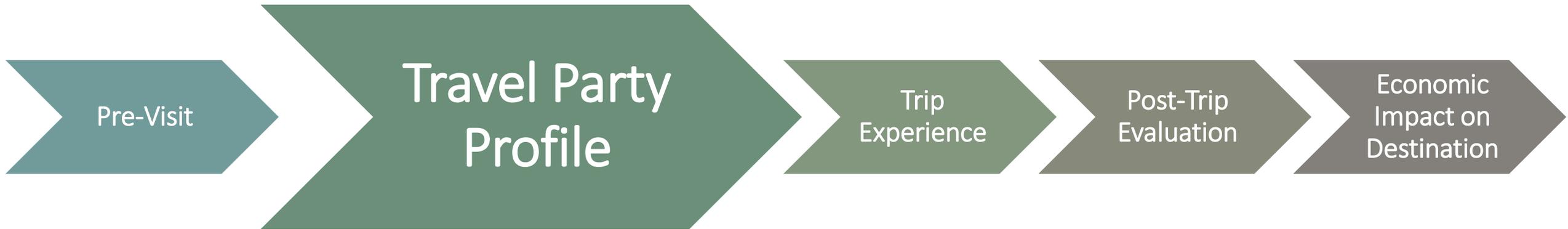
11% Other online travel agency

11% Airbnb

Transportation

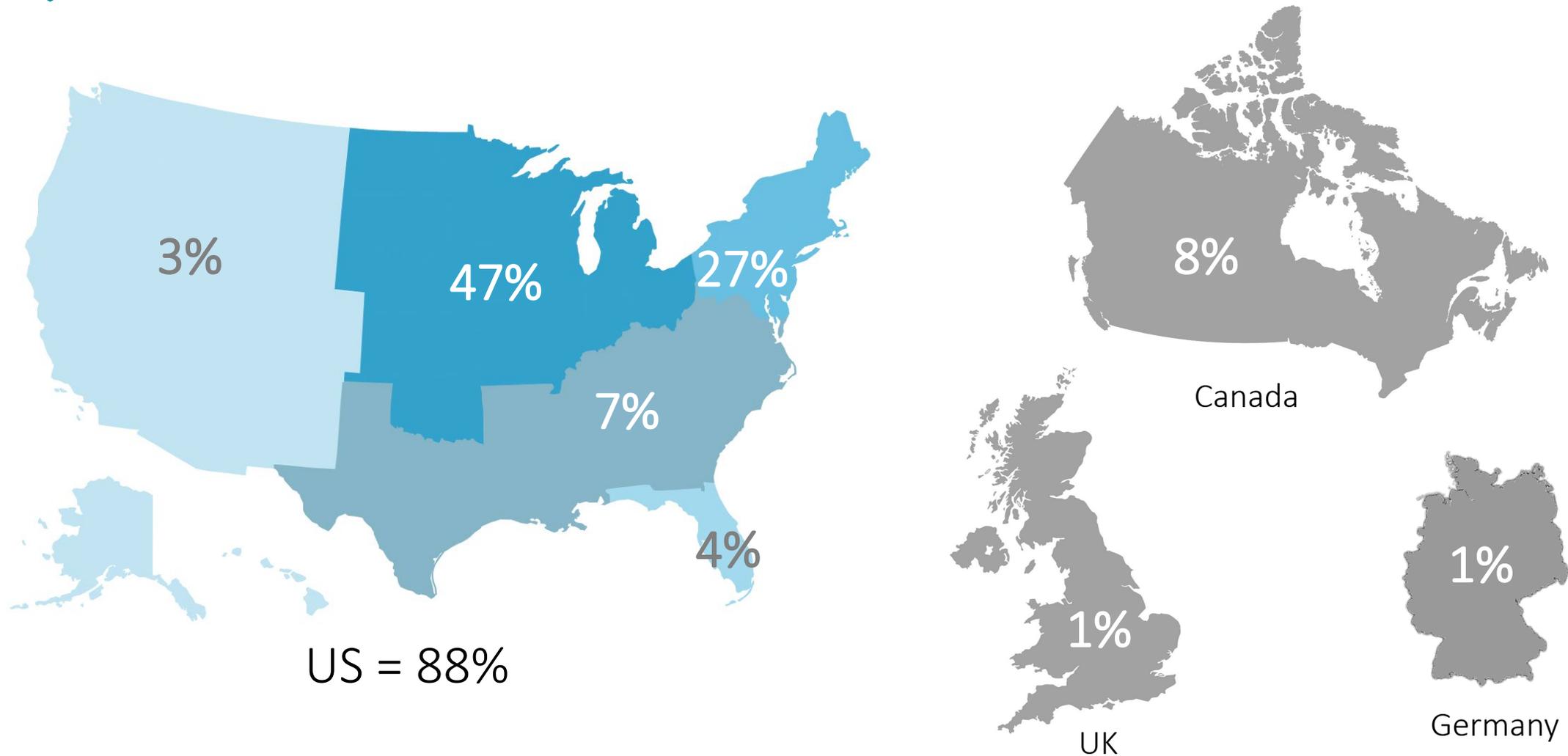→ **64%** of visitors flew to The Beaches of Fort Myers & Sanibel

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

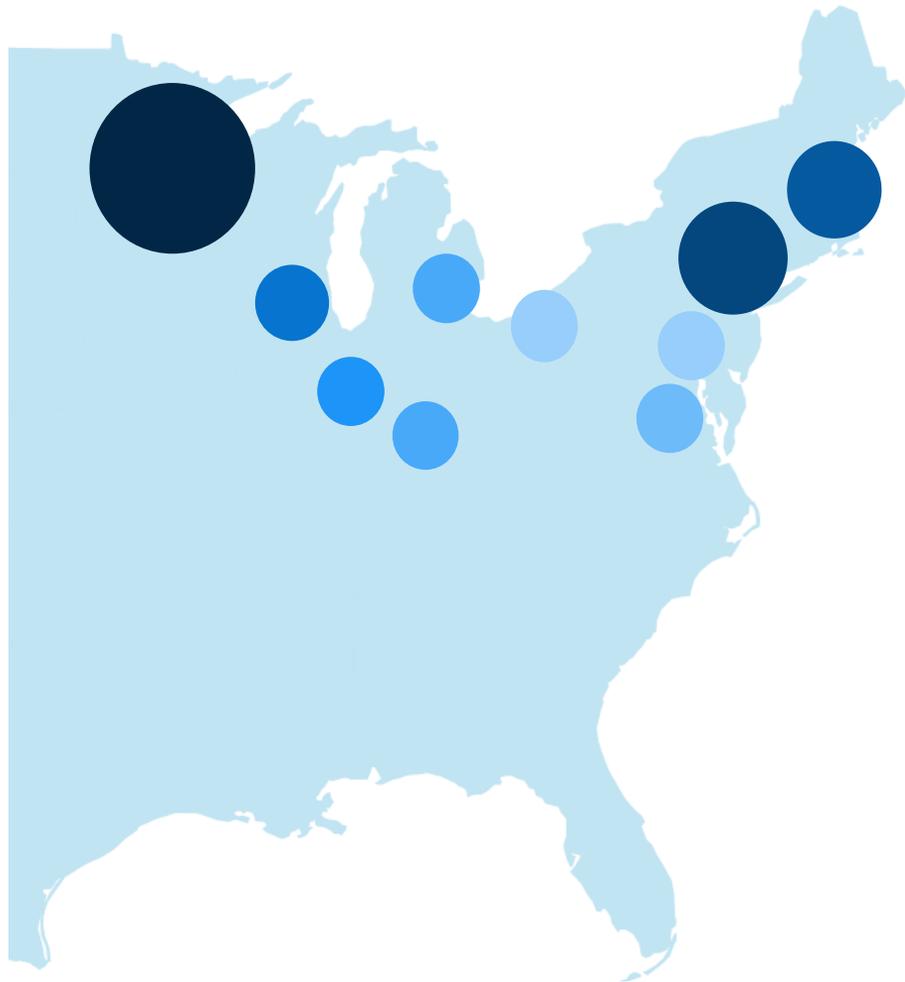THE BEACHES OF
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Visitor Journey: Travel Party Profile

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

January – March 2019

Origin

US = 88%

3%

47%

27%

7%

4%

8%
Canada

1%
UK

1%
Germany

Top Origin Markets

9% Minneapolis

6% New York

5% Boston

5% Chicago

3% Indianapolis

3% Detroit

3% Cincinnati

3% Washington D.C.-Baltimore

3% Philadelphia

3% Cleveland-Akron

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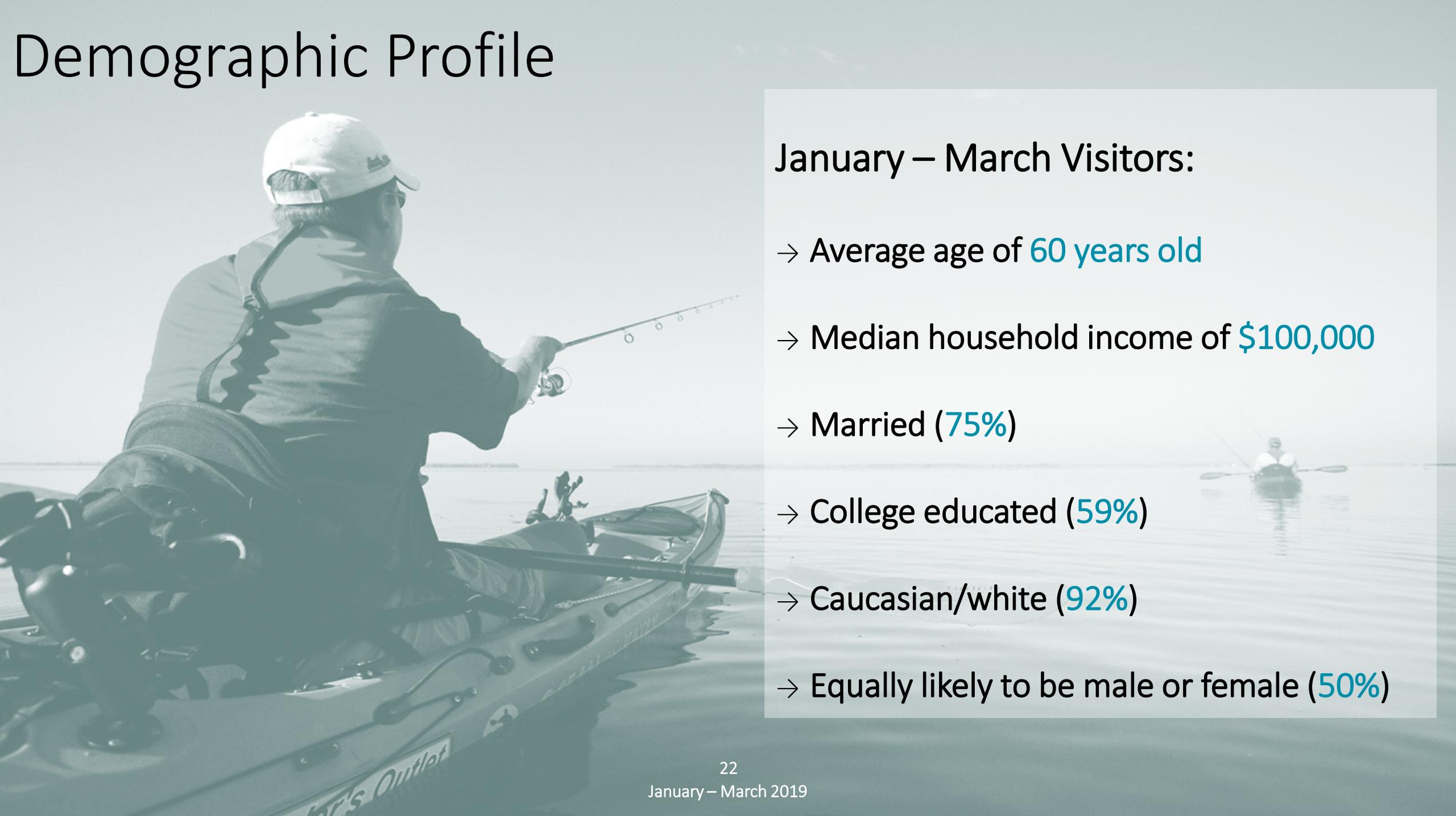January – March 2019

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Travel Party Size and Composition

→Visitors traveled in a party composed of **2.9 people**[1]

→**23%** traveled with children under the age of 18

→**Half** of visitors traveled as a couple, while **3 in 10** traveled as a family

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

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Demographic Profile

January – March Visitors:

→ Average age of 60 years old

→ Median household income of $100,000

→ Married (75%)

→ College educated (59%)

→ Caucasian/white (92%)

→ Equally likely to be male or female (50%)

Visitor Journey: Trip Experience

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

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Accommodations

35% Non-paid Accommodations

29% Condo/Vacation Rental

27% Hotel/Motel/Resort/B&B

5% Day trippers

4% RV Park/Campground

→ **34%** of visitors said paid accommodations "Far Exceeded" or "Exceeded" their expectations

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Length of Stay & Number of Times in Destination

→Visitors[1] spent **13.4 nights** in The Beaches of Fort Myers & Sanibel

→**23%** stayed more than 30 nights

→**23%** were first time visitors

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

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Visitor Activities

→Top visitor activities include[1]:

75% Beaches

69% Relax & unwind

62% Dining

[1]Multiple responses permitted.

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Reason for Visiting vs. Visitor Activities

	Reason for Visiting		Visitor Activities
Key Reasons for Visiting	46%[1]	Beaches	75%[2]
	44%	Relax & unwind	69%
	31%	Visiting friends	39%
Trip Enhancements	7%	Sporting event	12%
	6%	Nature	24%
	5%	Biking, hiking	21%
	4%	Fishing	14%
	3%	Shopping	48%
	3%	Attractions	19%
	3%	Golf or tennis	19%
	2%	Water sports	23%
	2%	Culture	10%
	1%	Photography	12%

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

January – March 2019
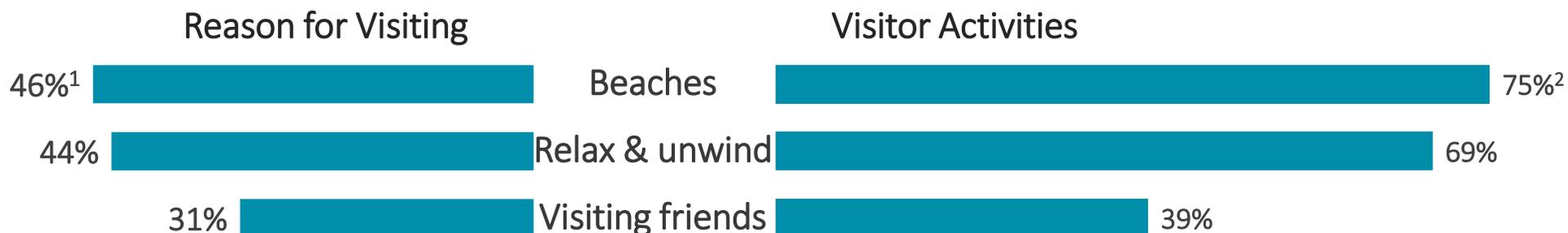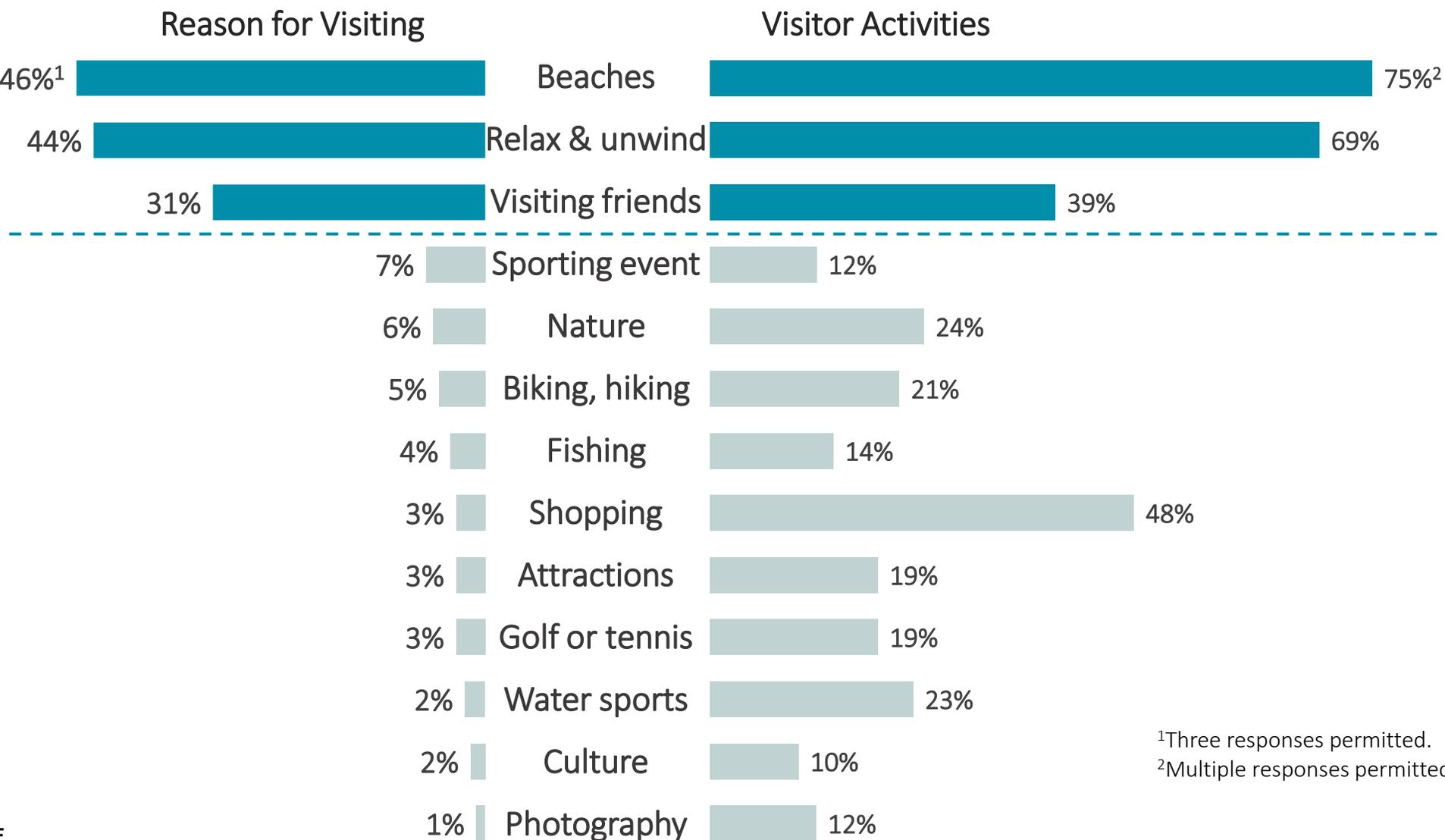
Top Attractions Visited[1]

75% Beaches

39% Fort Myers Beach Pier

26% Sanibel Lighthouse

24% Edison & Ford Winter Estates

20% Miromar Outlets

19% Sanibel Outlets

16% Ding Darling Wildlife Refuge

[1]Multiple responses permitted.

Top Communities Stayed

26% Fort Myers

19% Fort Myers Beach

16% Sanibel Island

14% Cape Coral

Visitor Journey: Post-Trip Evaluation

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

January – March 2019

Satisfaction

→ **92%** of visitors are likely to recommend The Beaches of Fort Myers & Sanibel

→ **89%** of visitors are likely to return

→ **75%** of visitors are likely to return next year

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Satisfaction

→ **96%** of visitors were satisfied or very satisfied with their overall visit to The Beaches of Fort Myers & Sanibel

→ **89%** of visitors were satisfied or very satisfied with customer service on their visit

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Top Attribute Ratings

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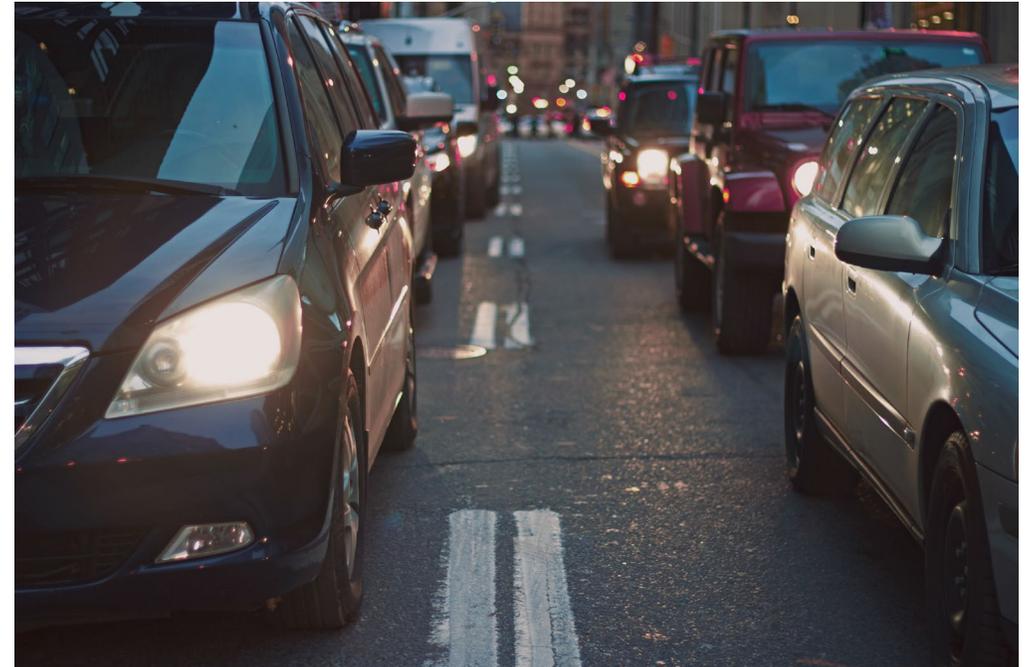

96% Warm weather

93% Peaceful/relaxing

92% Safe destination

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

Visitor Concerns

→**56%** of visitors were concerned about traffic in The Beaches of Fort Myers & Sanibel

→**22%** of visitors had no concerns about the destination

Area Descriptions

"We are living our best lives and this is the place to do it. We have been to other areas in Florida before and we like this area much more. It has a slower pace but at the same time it is exciting."

Wonderful to Visit

"Very calming and peaceful; a nice place to unwind."

Relaxing and Peaceful

"My husband and I think Fort Myers beach has some of the most beautiful ocean waters. We do a lot of traveling and must say that these blue waters are very impressive."

Beautiful Beaches

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Occupancy Barometer: April – June Reservations

2018

2019

	2018	2019
Up	32%	19%
Same	39%	39%
Down	16%	38%
Not sure	13%	5%

January – March 2019

Occupancy Barometer: July – September Reservations

2018

2019

27%

12%

Up

53%

44%

Same

11%

35%

Down

9%

Not sure

9%

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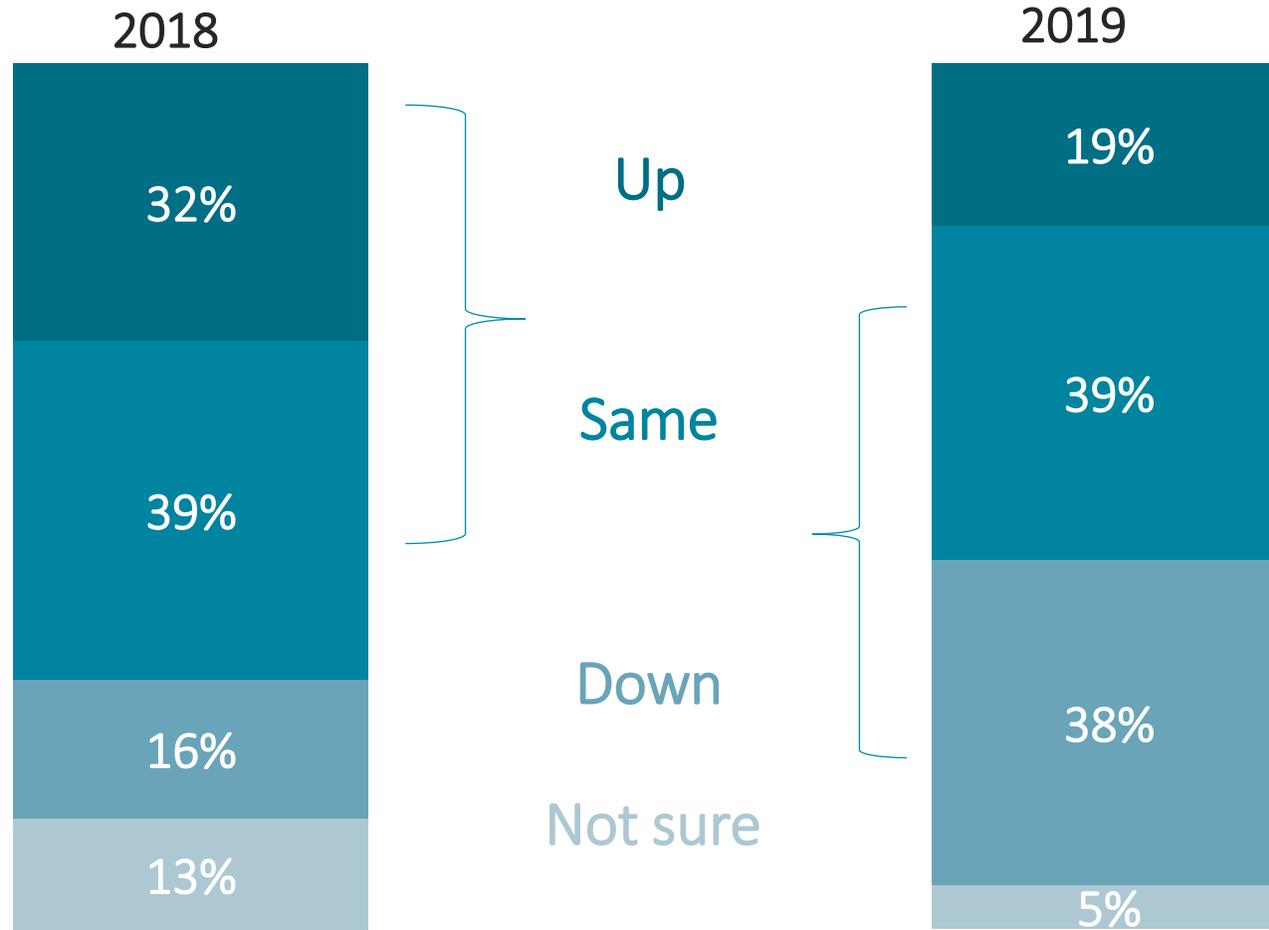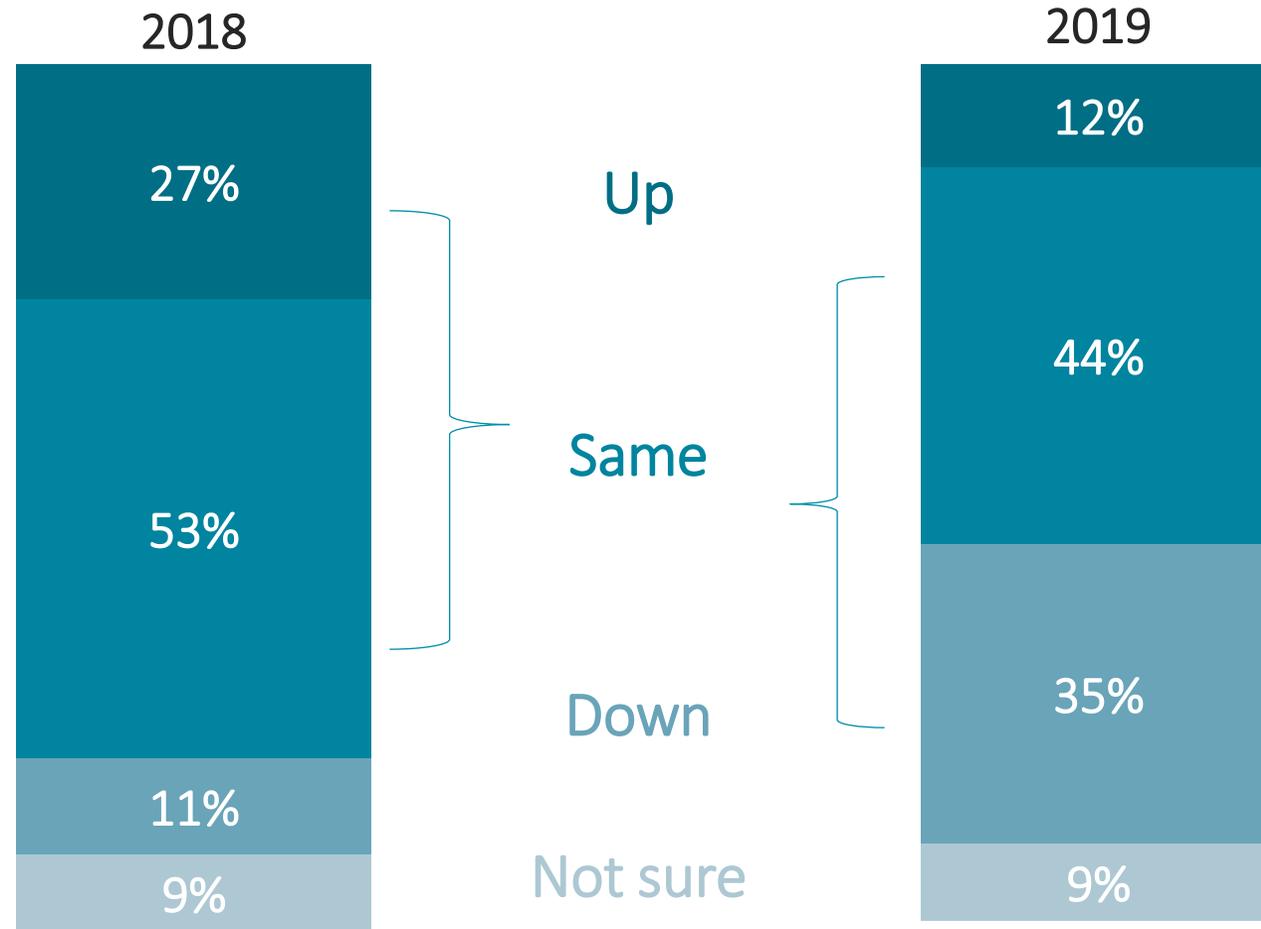
Detailed Findings

Visitor Journey: Economic Impact on Destination

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

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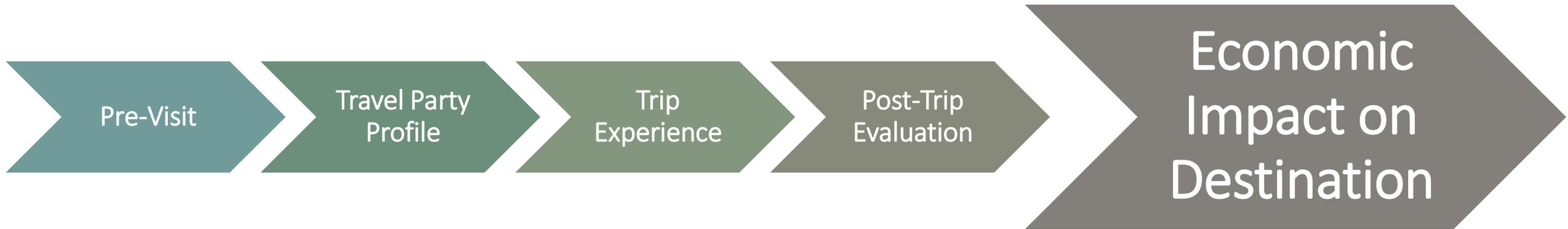
Number of Visitors

There were **1,311,900**[1] visitors to The Beaches of Fort Myers & Sanibel in January-March 2019.

Paid Accommodations
787,140
789,270

Non-Paid Accommodations
459,170
577,815

Day Trippers
65,590
NA
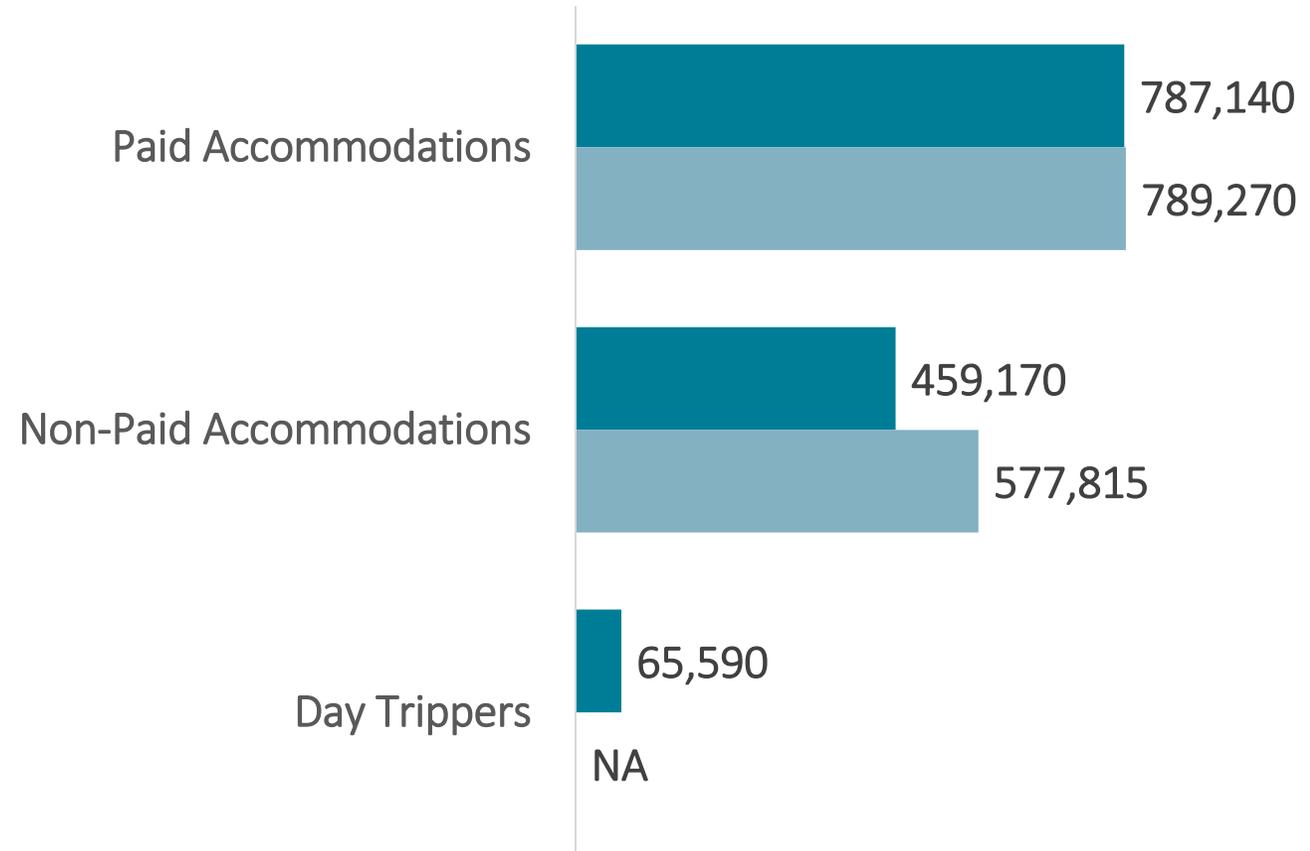
[1]Sources: Visitor Tracking Study & Occupancy Survey

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Visitor Type

Visitors staying in paid accommodations accounted for **6 in 10** visitors.

Paid Accommodations
- 2019: 60%
- 2018: 58%

Non-Paid Accommodations
- 2019: 35%
- 2018: 42%

Day Trippers
- 2019: 5%
- 2018: NA

■ 2019 ■ 2018

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Visitor Expenditures

January – March visitors spent **$1,251,828,600** in The Beaches of Fort Myers & Sanibel, resulting in a total economic impact of **$2,032,969,600**.

Paid Accommodations
- $859,892,900
- $888,094,155

Non-Paid Accommodations
- $387,914,700
- $303,887,899

Day Trippers
- $4,021,000
- NA

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Visitor Expenditures

January – March visitors spent **$1,251,828,600** in The Beaches of Fort Myers & Sanibel, resulting in a total economic impact of **$2,032,969,600**.

Category		
Accommodations	$378,418,600	$310,282,844
Restaurants	$298,380,700	$297,661,359
Groceries	$165,231,900	$66,200,000
Shopping	$157,063,000	$264,895,052
Transportation	$93,515,400	$103,684,422
Admissions to attractions/events	$80,354,200	$80,900,000
Other entertainment	$36,748,700	$32,200,000
Other	$42,116,100	$36,158,377

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Visitor Expenditures by Lodging Type

Jan – March visitors staying in paid accommodations spent **$859,892,900** in The Beaches of Fort Myers & Sanibel.
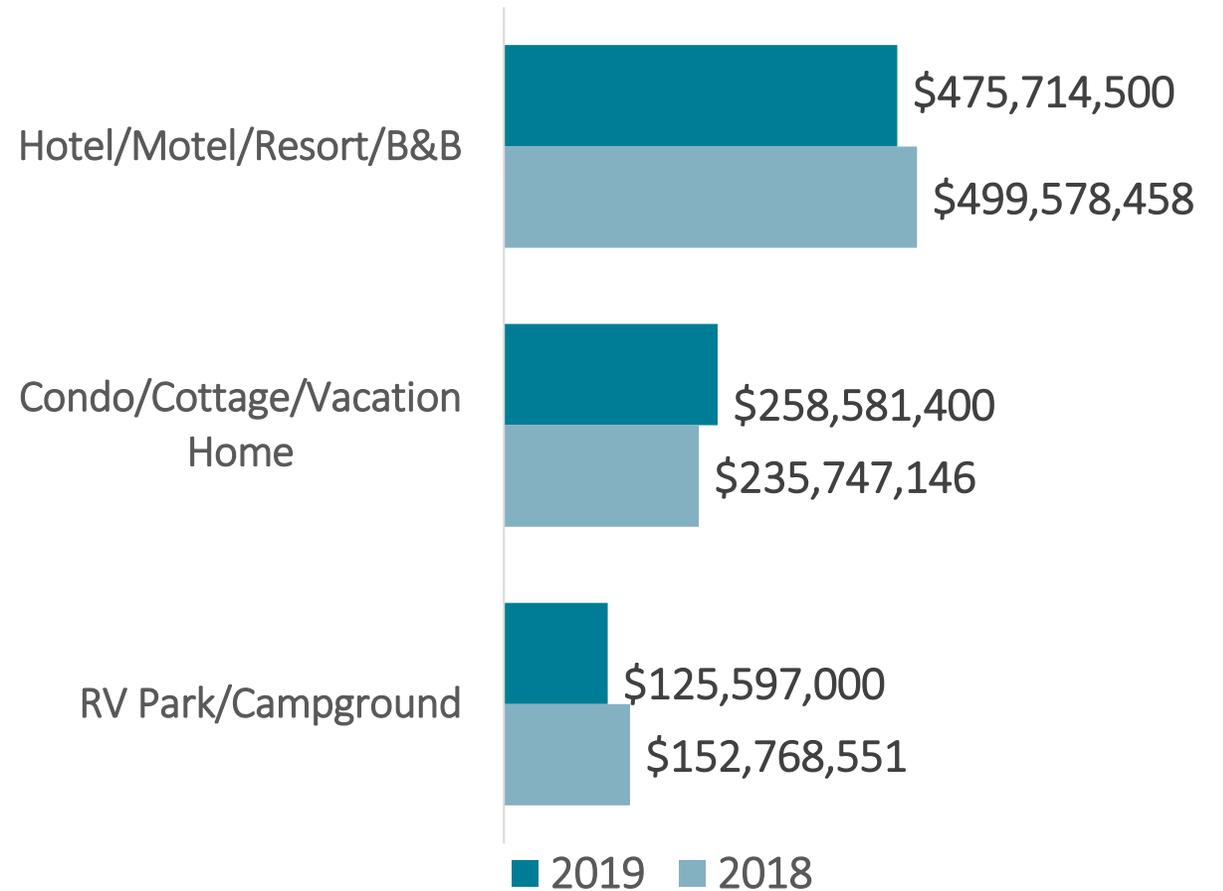
Hotel/Motel/Resort/B&B
- $475,714,500
- $499,578,458

Condo/Cottage/Vacation Home
- $258,581,400
- $235,747,146

RV Park/Campground
- $125,597,000
- $152,768,551

■ 2019 ■ 2018

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Room Nights Generated

January – March visitors spent **1,848,200**[1] nights in The Beaches of Fort Myers & Sanibel hotels, resorts, condos, rental houses etc. (+2.6% from 2018).

1,800,600
1,848,200

2018   2019

[1]Source: Occupancy Survey

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Room Nights Generated

January – March visitors spent **1,848,200[1]** nights in The Beaches of Fort Myers & Sanibel hotels, resorts, condos, rental houses, etc. (+2.6% from 2018).

Hotel/Motel/Resort/B&B
- 913,600
- 909,028

Condo/Cottage/Vacation Home
- 465,100
- 364,717

RV Park/Campground
- 469,500
- 526,826

[1]Source: Occupancy Survey

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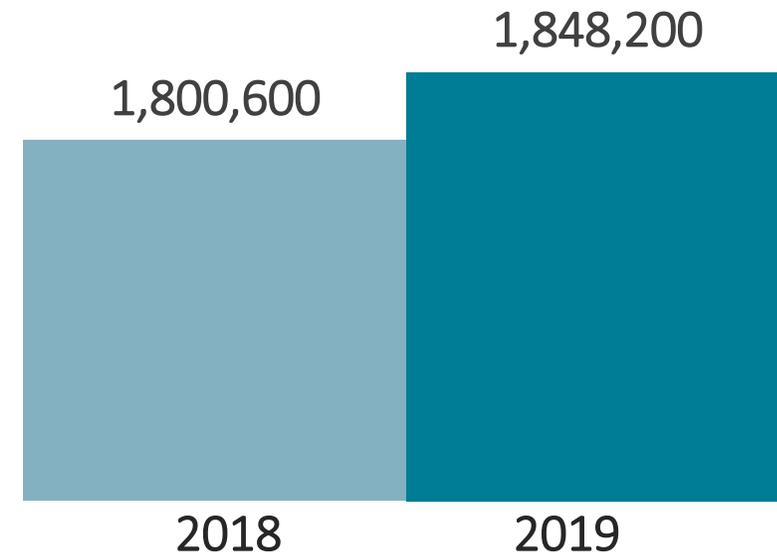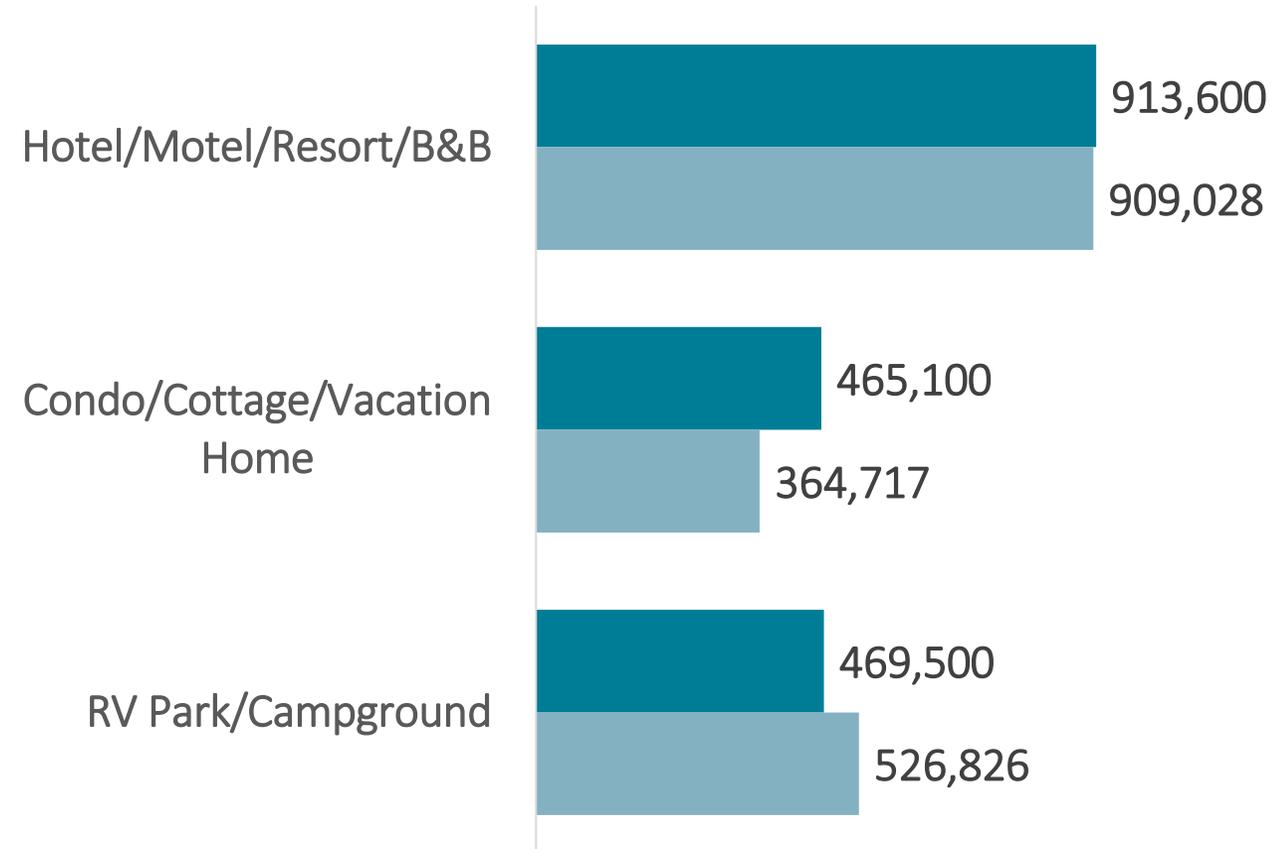
Available Units

There were **23,370**[1] available units in January – March, 2019 vs. 22,528 in 2018 (+3.7%)

Hotel/Motel/Resort/B&B
- 11,900
- 11,587

Condo/Cottage/Vacation Home
- 5,873
- 4,837

RV Park/Campground
- 5,597
- 6,104

■ 2019　■ 2018

[1]Source: Occupancy Survey

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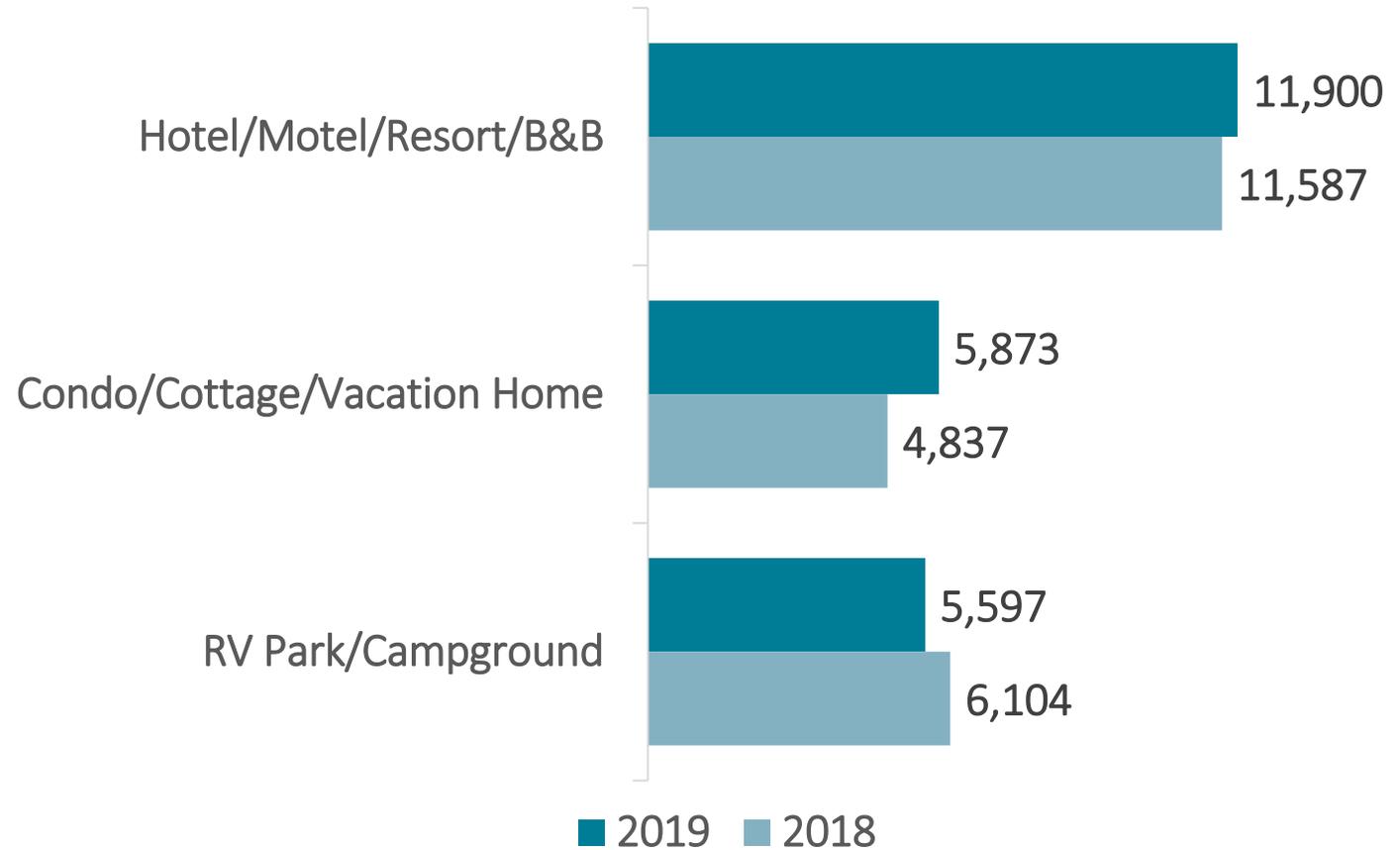
Occupancy, ADR and RevPAR
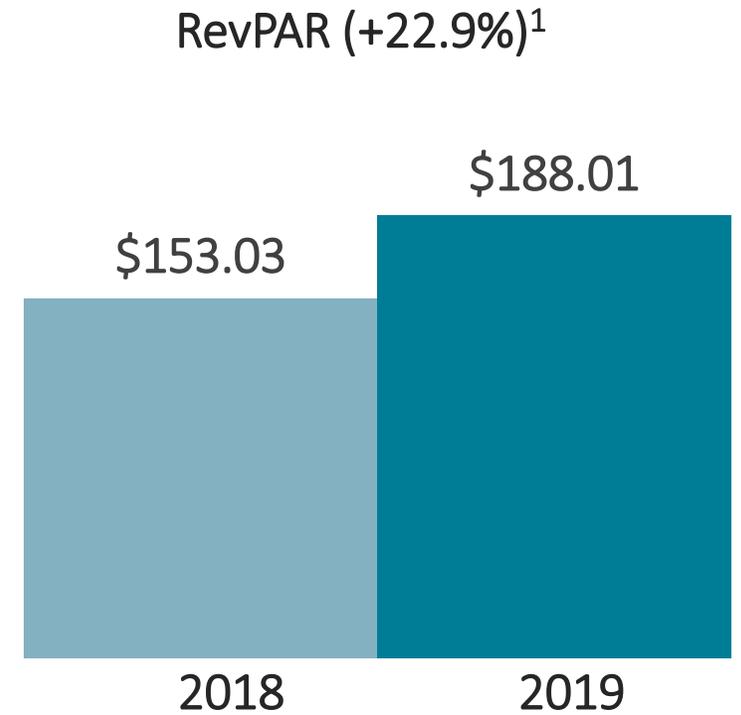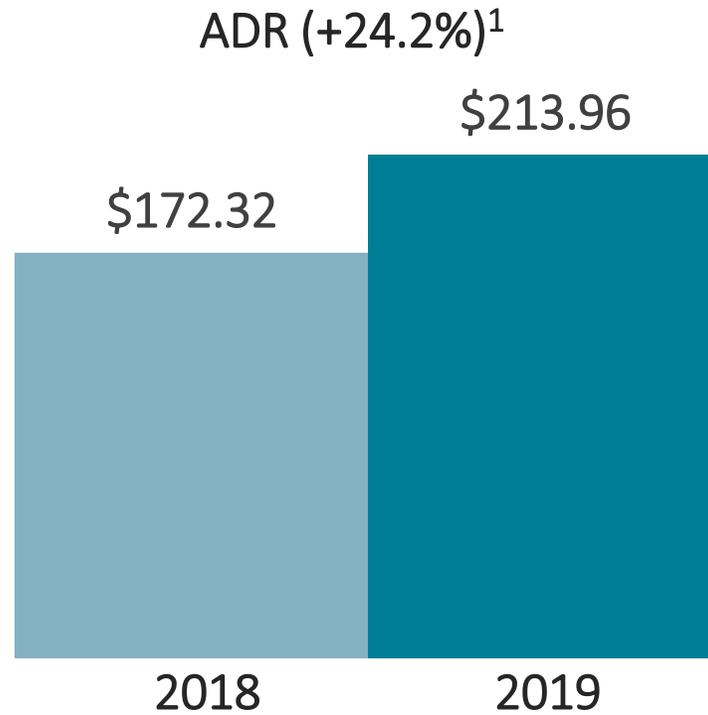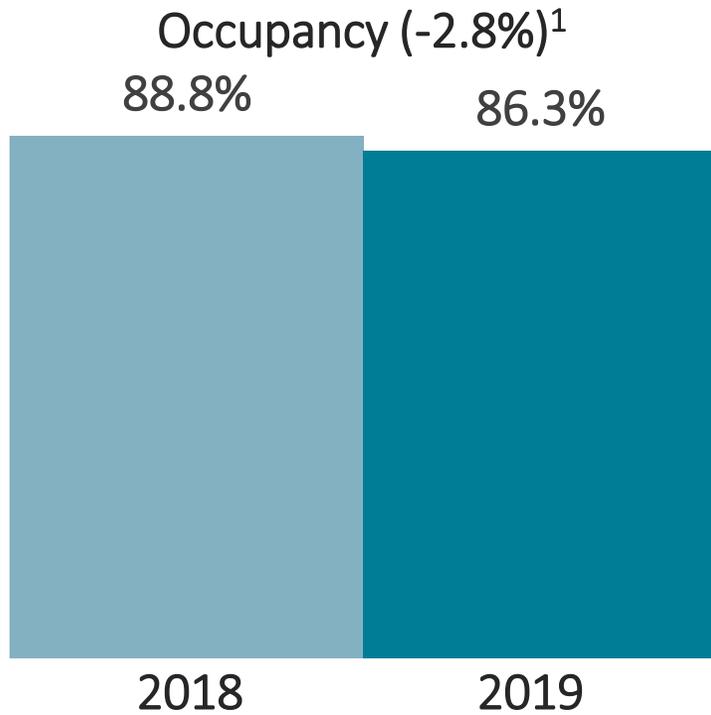
Occupancy (-2.8%)[1]

88.8%
86.3%

2018   2019

ADR (+24.2%)[1]

$172.32
$213.96

2018   2019

RevPAR (+22.9%)[1]

$153.03
$188.01

2018   2019

[1]Source: Occupancy Survey
Adjusted from original report to reflect updated occupancy figures

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Occupancy

Average occupancy in January – March was **86.3%**[1] (88.8% in 2018).

Hotel/Motel/Resort/B&B
- 2019: 85.3%
- 2018: 87.2%

Condo/Cottage/Vacation Home
- 2019: 88.0%
- 2018: 83.8%

RV Park/Campground
- 2019: 93.2%
- 2018: 95.9%

■ 2019 ■ 2018

[1]Source: Occupancy Survey

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ADR
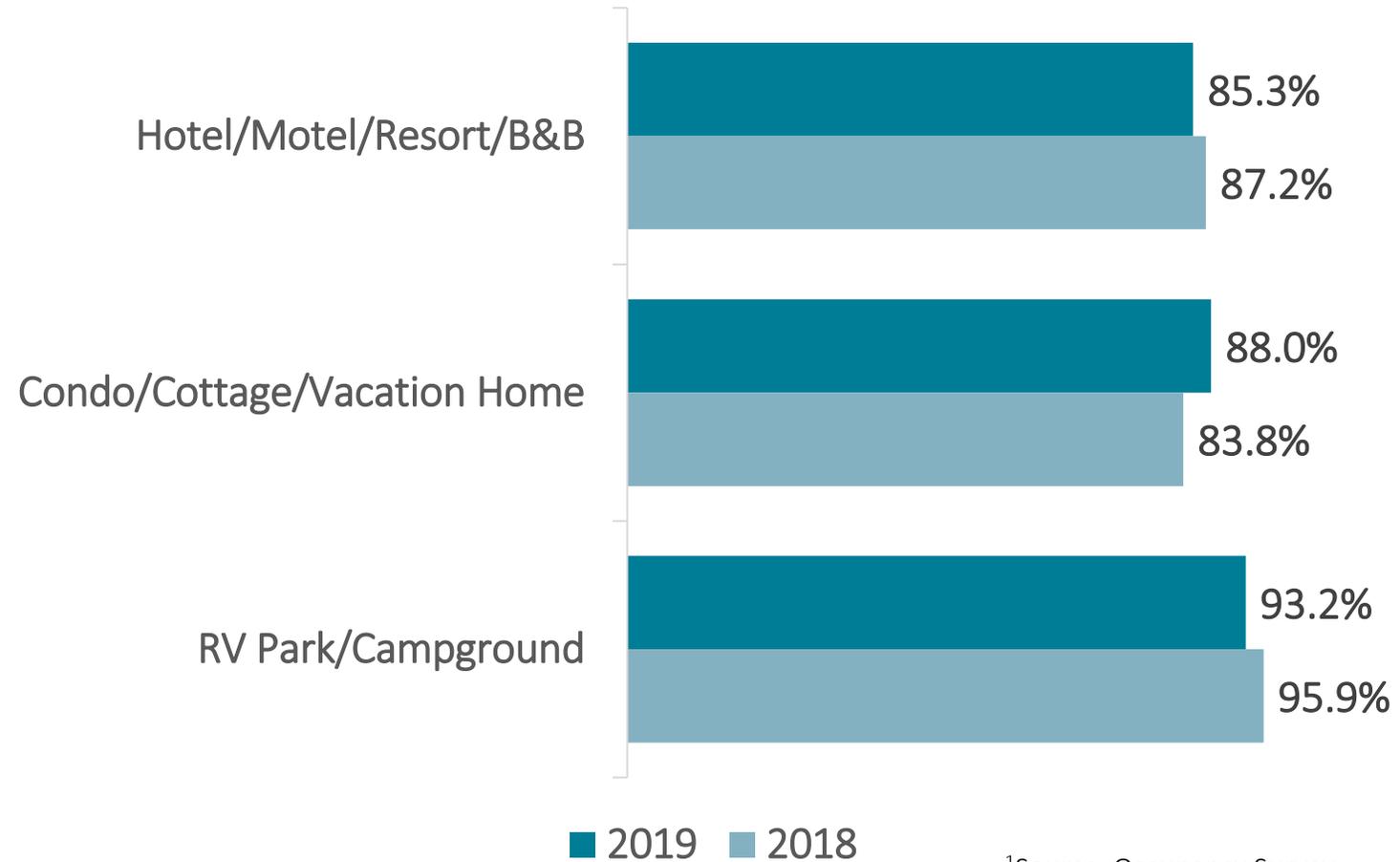
ADR in Jan – March was **$213.96**[1] ($172.32 in 2018).
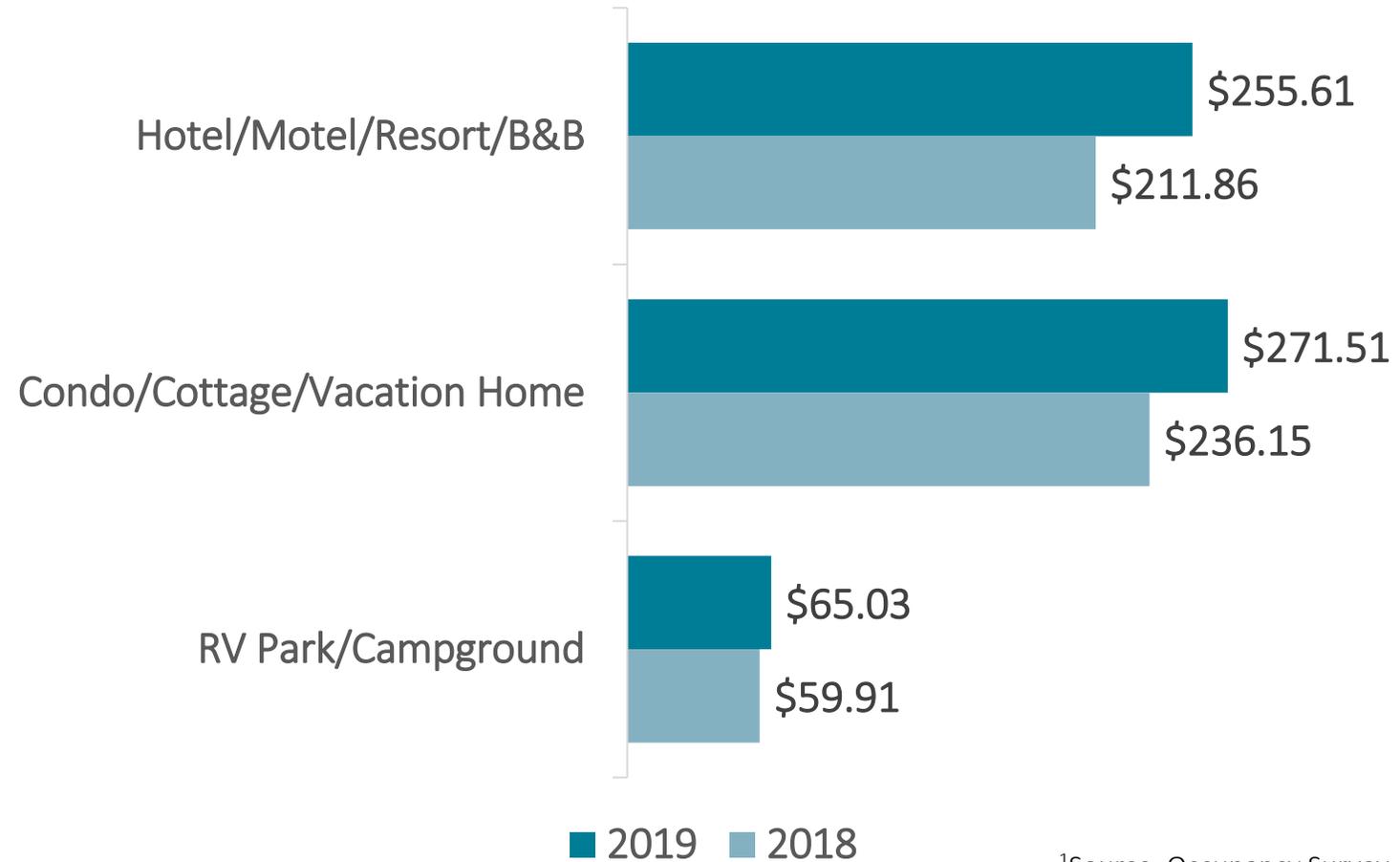
Hotel/Motel/Resort/B&B
- $255.61 (2019)
- $211.86 (2018)

Condo/Cottage/Vacation Home
- $271.51 (2019)
- $236.15 (2018)

RV Park/Campground
- $65.03 (2019)
- $59.91 (2018)

■ 2019 ■ 2018

[1]Source: Occupancy Survey
Adjusted from original report to reflect updated occupancy figures

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RevPAR

Average RevPAR in Jan – March was **$188.01**[1] ($153.03 in 2018).
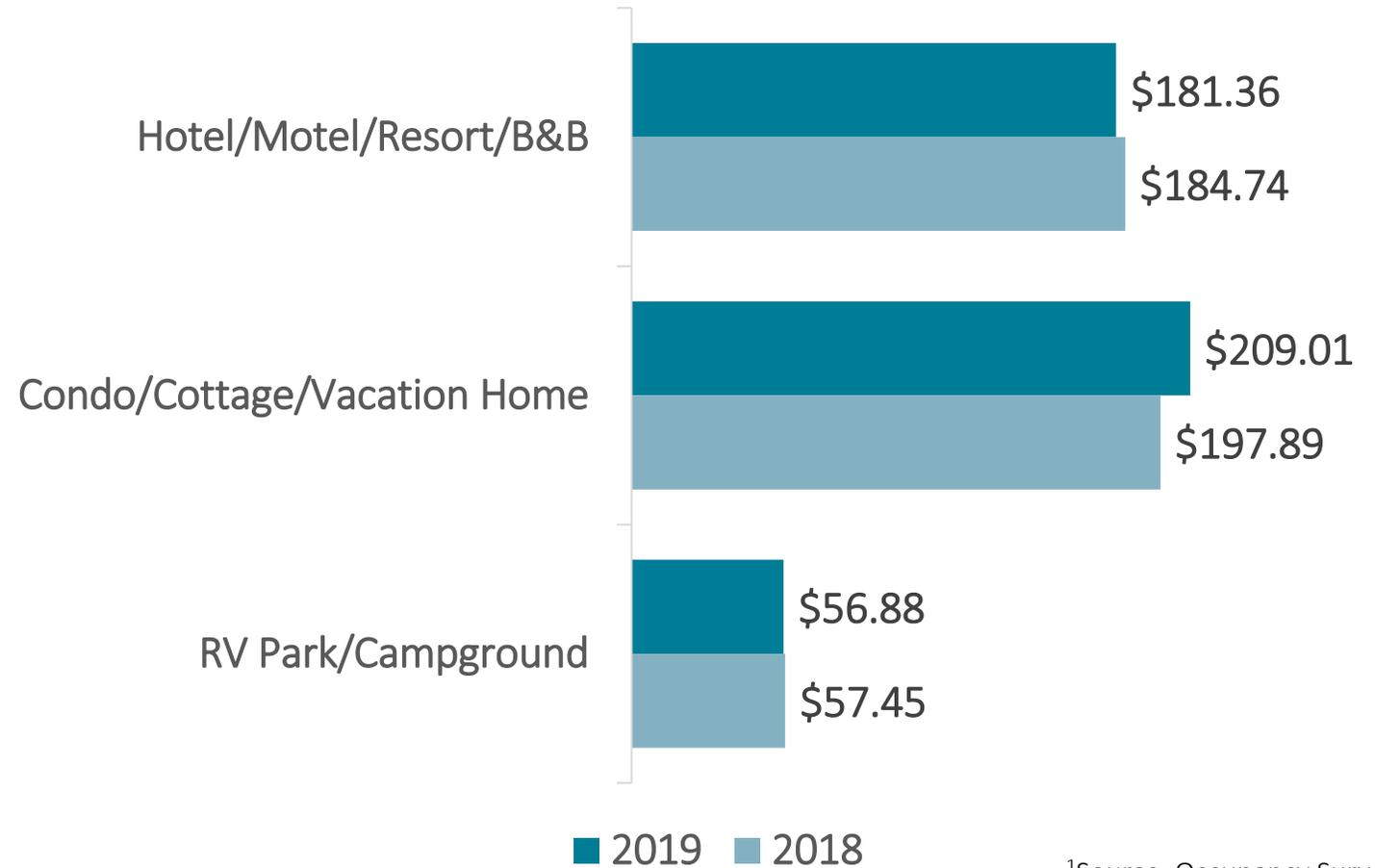
Hotel/Motel/Resort/B&B
- $181.36 (2019)
- $184.74 (2018)

Condo/Cottage/Vacation Home
- $209.01 (2019)
- $197.89 (2018)

RV Park/Campground
- $56.88 (2019)
- $57.45 (2018)

■ 2019 ■ 2018

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Travel Party Size

Average travel party size in January – March was **3.0 people**[1] (2.8 people in 2018).

Hotel/Motel/Resort/B&B
- 2019: 2.7
- 2018: 2.5

Condo/Cottage/Vacation Home
- 2019: 4.3
- 2018: 4.2

RV Park/Campground
- 2019: 2.3
- 2018: 2.4

■ 2019 ■ 2018
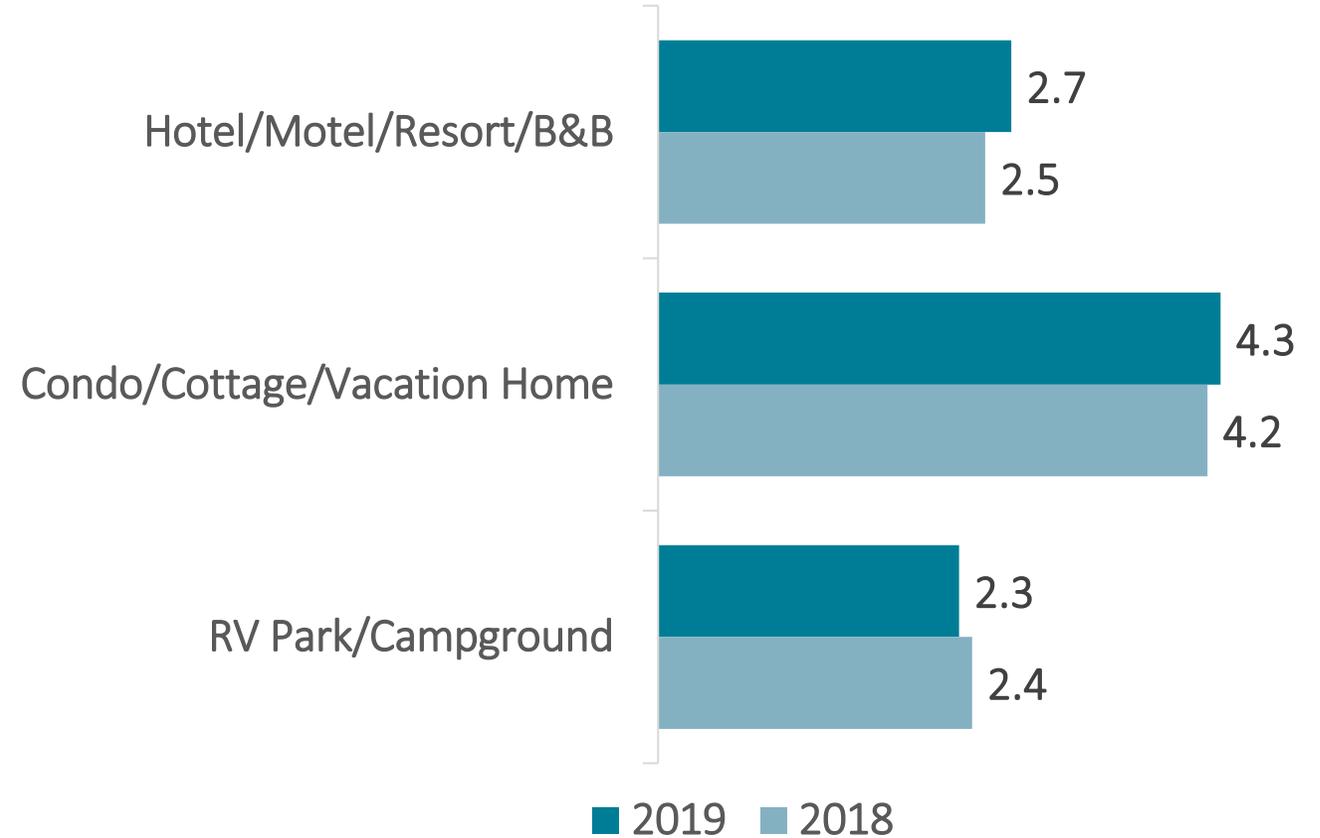
[1]Source: Occupancy Survey

Length of Stay

Average length of stay in January – March was **7.0 nights**[1] (6.4 nights in 2018).

Hotel/Motel/Resort/B&B
- 2019: 4.3
- 2018: 3.9

Condo/Cottage/Vacation Home
- 2019: 11.2
- 2018: 9.3

RV Park/Campground
- 2019: 28.0
- 2018: 27.7

■ 2019   ■ 2018

[1]Source: Occupancy Survey

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Visitor Journey: Pre-Visit

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

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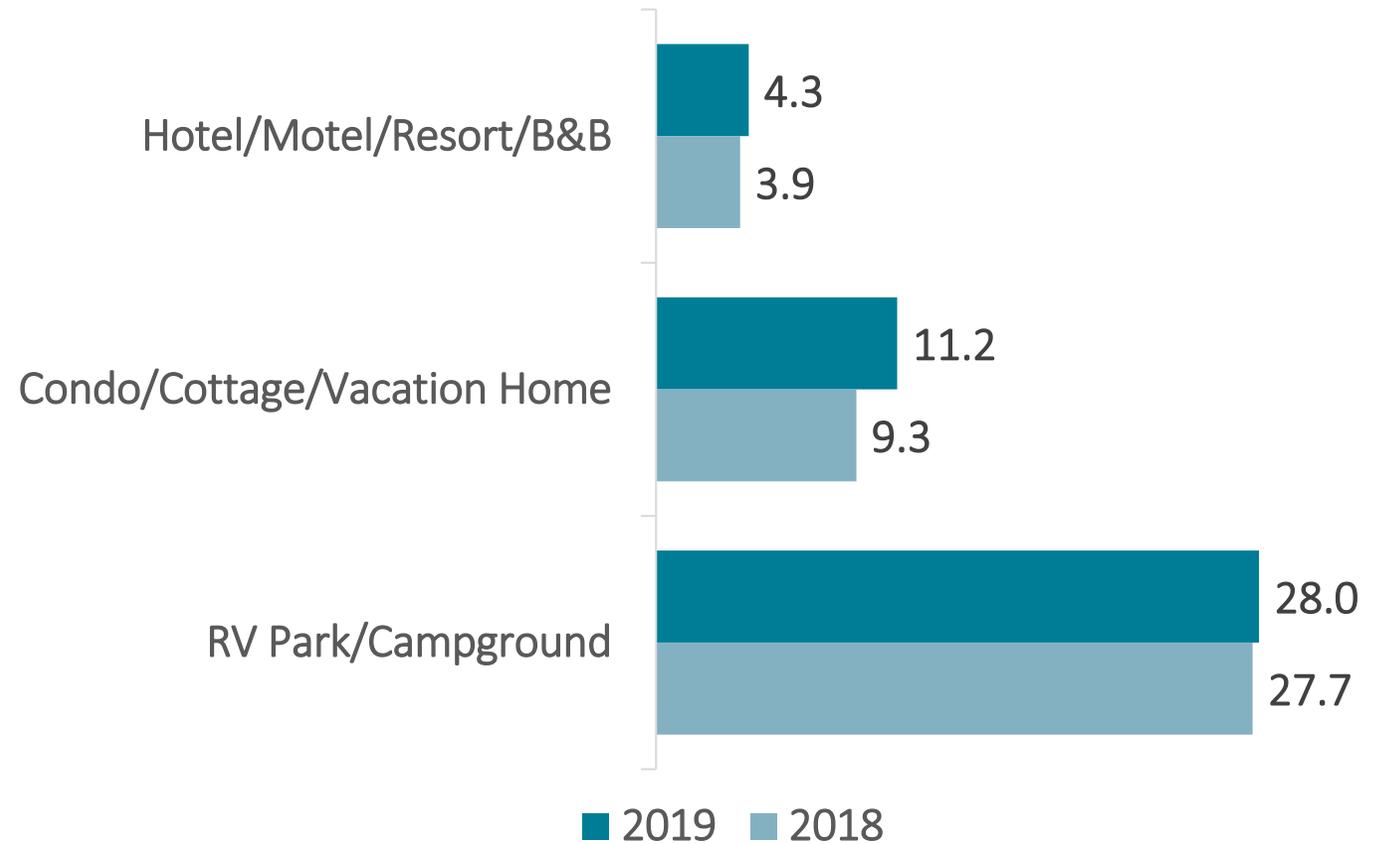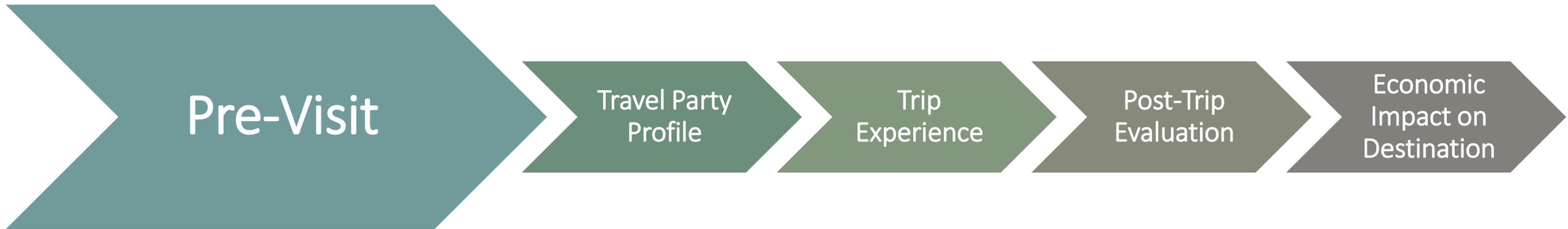
Trip Planning Cycle
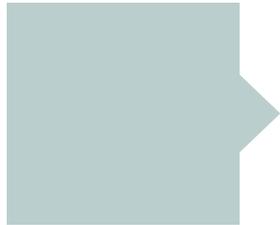
2 in 3 visitors planned their trip at least 3 months in advance, while only 16% planned their trip less than a month in advance.

- 1 week or less: 8%
- 2-4 weeks: 8%
- 1-2 months: 18%
- 3-6 months: 29%
- 6 months or more: 37%

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Trip Planning: Websites Used

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

Airline websites	24%[1]
Search engines	20%
Trip Advisor	18%
AirBnB, VRBO, Homeaway, etc.	16%
Hotel websites	15%
Booking websites	14%
Vacation rental websites	10%
Facebook	6%
www.FortMyers-Sanibel.com	5%
Visit Florida	4%
Beaches of Fort Myers & Sanibel Social Media	3%
Travel reviews, blogs, stories, etc.	3%
Instagram	2%
Youtube, Hulu, Pandora	2%
Other	8%
None/Don't visit websites	31%

[1]Multiple responses permitted.

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Trip Planning: Information Requests
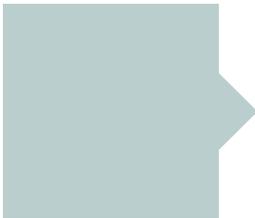
2 in 10 visitors made information requests to plan their trip to The Beaches of Fort Myers & Sanibel.

Call hotel/motel/condo — 8%[1]

Call VCB — 2%

Visitor guide — 2%

Call local Chamber of Commerce — 2%

Fort Myers-Sanibel E-newsletter — 1%

Other — 8%

None/Did not request info — 79%

[1]Multiple responses permitted.

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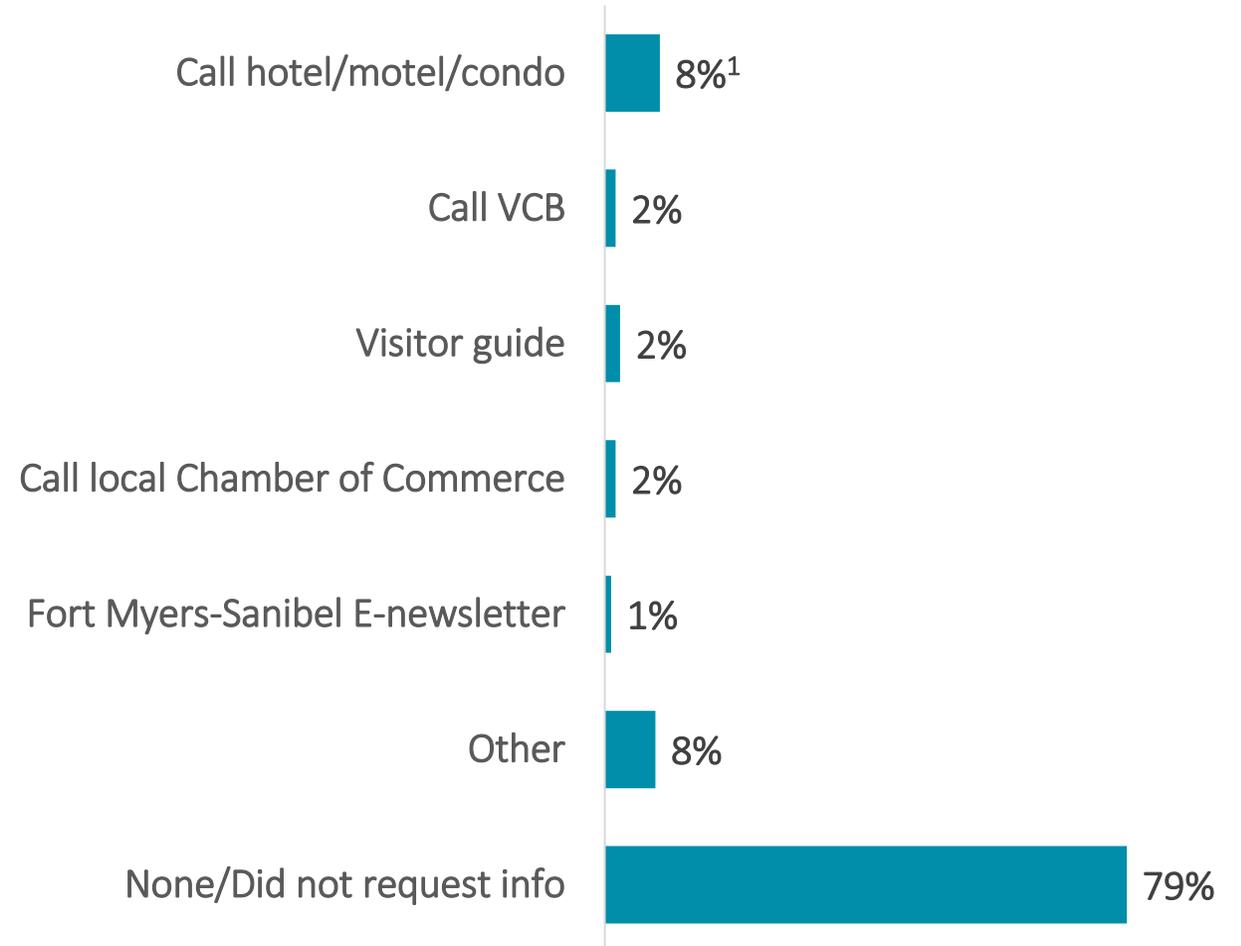
Trip Planning: Other destinations considered

17% of visitors considered choosing other destinations when planning their trips.

Destination	%
Naples	13%
Keys/Key West	10%
Marco Island	9%
Siesta Key	7%
Ft. Lauderdale	6%
Orlando	6%
Miami	5%
Venice	2%
Clearwater	2%
Tampa	2%
Other destinations in Florida	18%
Other destinations outside of Florida	20%

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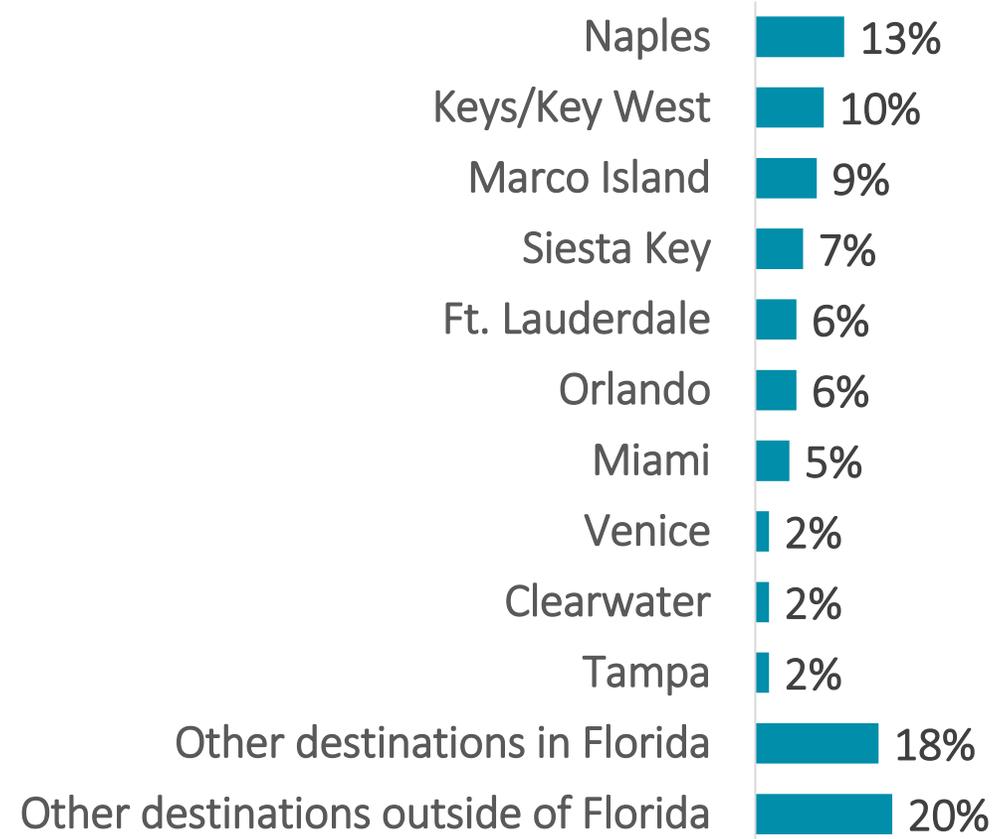
Trip Influencers

9 in 10 visitors were heavily influenced by warm weather when thinking about visiting The Beaches of Fort Myers & Sanibel.

Attribute	Score
Warm weather	92%[1]
Peaceful/relaxing	86%
A safe destination	80%
White sandy beaches	80%
Convenient location	76%
Clean, unspoiled environment	75%
Plenty to see and do	73%
A "family" atmosphere	64%
Value for your travel dollar	61%
Reasonably priced lodging	51%

[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.

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Reason for visiting

Reason	Percentage
Beach	46%[1]
Relax and unwind	44%
Vacation	41%
Visiting friends or relatives	31%
Sporting events	7%
Nature, environment, bird watching	6%
Biking, hiking, etc.	5%
Fishing, etc.	4%
Attractions	3%
Shopping	3%
Golf or tennis	3%
Special event	2%
Water sports	2%
Special occasion	2%
Culture	2%
Business conference/meeting	1%
Museums, history	1%
Diving/snorkeling	1%
Guided Tours	1%
Photography	1%
Other	8%

[1]Three responses permitted.

Promotions

35% of visitors recalled promotions in the past 6 months for The Beaches of Fort Myers & Sanibel.

Channel	Percentage
Television	42%[1]
Social media	32%
Internet	30%
Newspaper	18%
Travel/visitor guide	13%
Traveler reviews/blogs	12%
Radio	11%
Magazine	9%
Billboard	5%
Brochure	5%
www.FortMyers-Sanibel.com	4%
Deal-based promotion	2%
AAA	2%
Other	3%

[1]Multiple responses permitted.

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Booking

1 in 3 visitors who stayed in paid accommodations booked directly with a hotel/condo.

Directly with hotel/condo — 35%

VRBO, HomeAway — 14%

Through a vacation rental company — 12%

Airbnb — 11%

Online travel agency — 11%

Other — 16%

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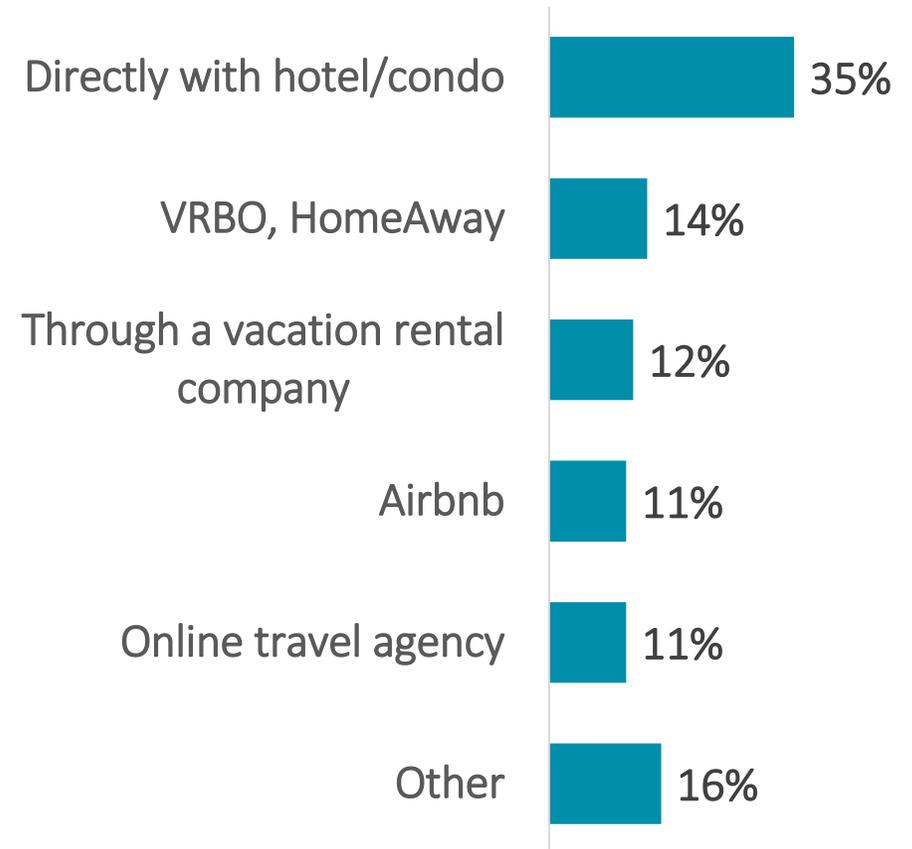
Transportation

2 in 3 visitors flew to The Beaches of Fort Myers & Sanibel.

- Fly — 64%
- Drive a personal vehicle — 32%
- Drive a rental vehicle — 2%
- Drive an RV — 2%

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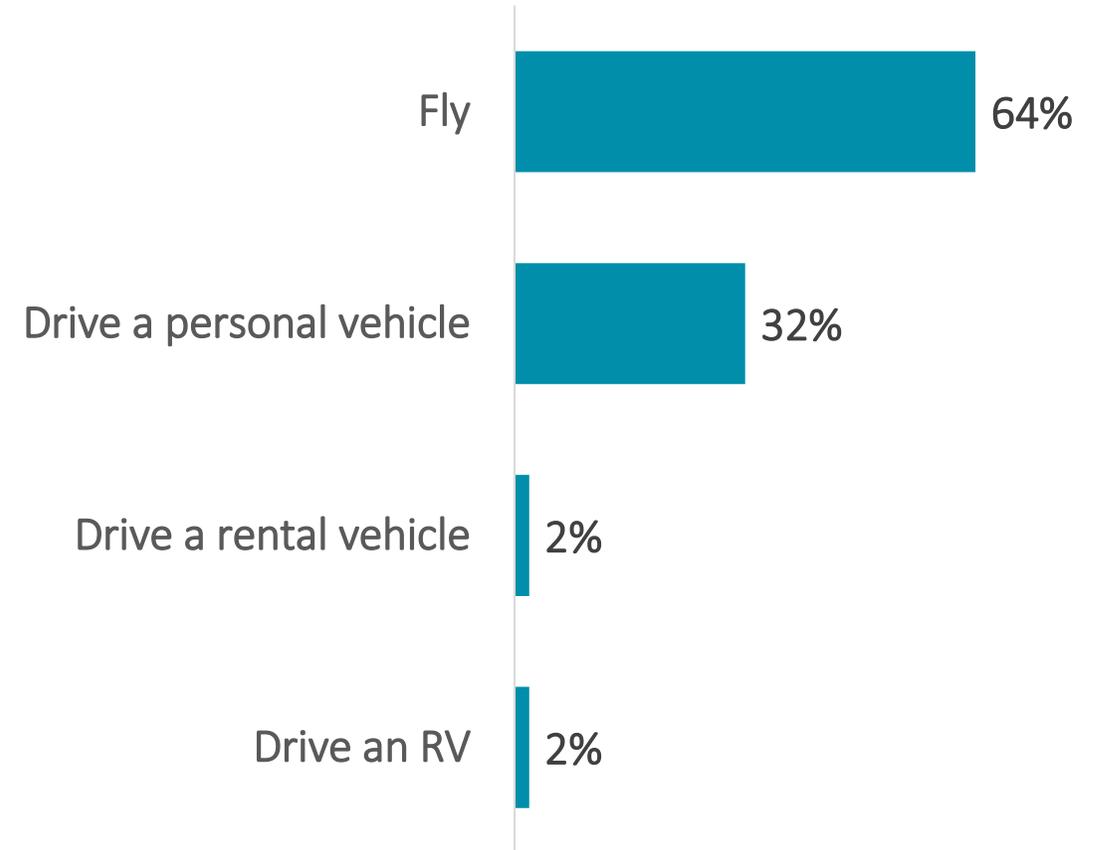
8 in 10 visitors who flew to The Beaches of Fort Myers & Sanibel came through RSW.

Airport	Percentage
Southwest Florida International	80%
Punta Gorda	9%
Orlando International	3%
Miami International	2%
Ft. Lauderdale international	2%
Tampa International	<1%
Other	1%

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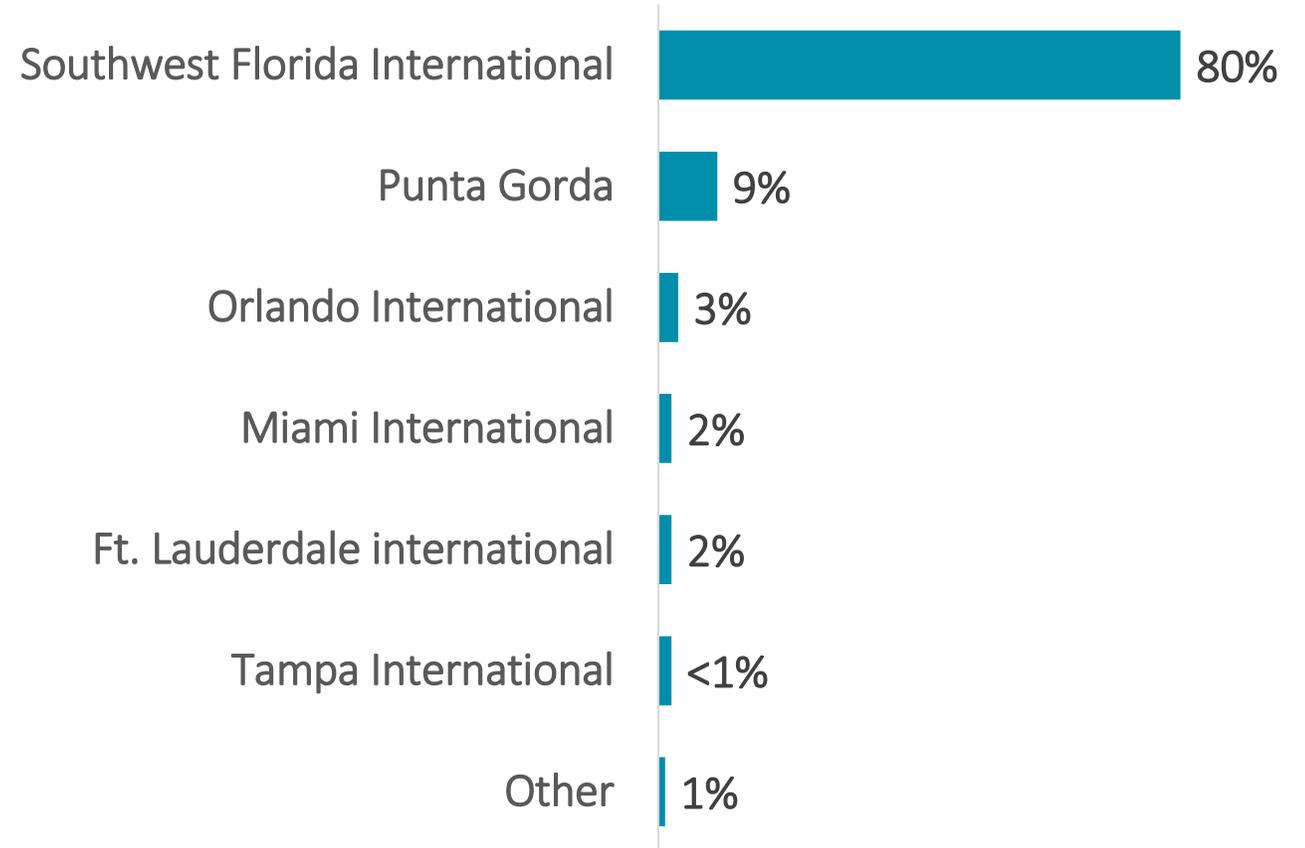
Use of RSW in the Past Year

51% of visitors used RSW at least once in the past year.
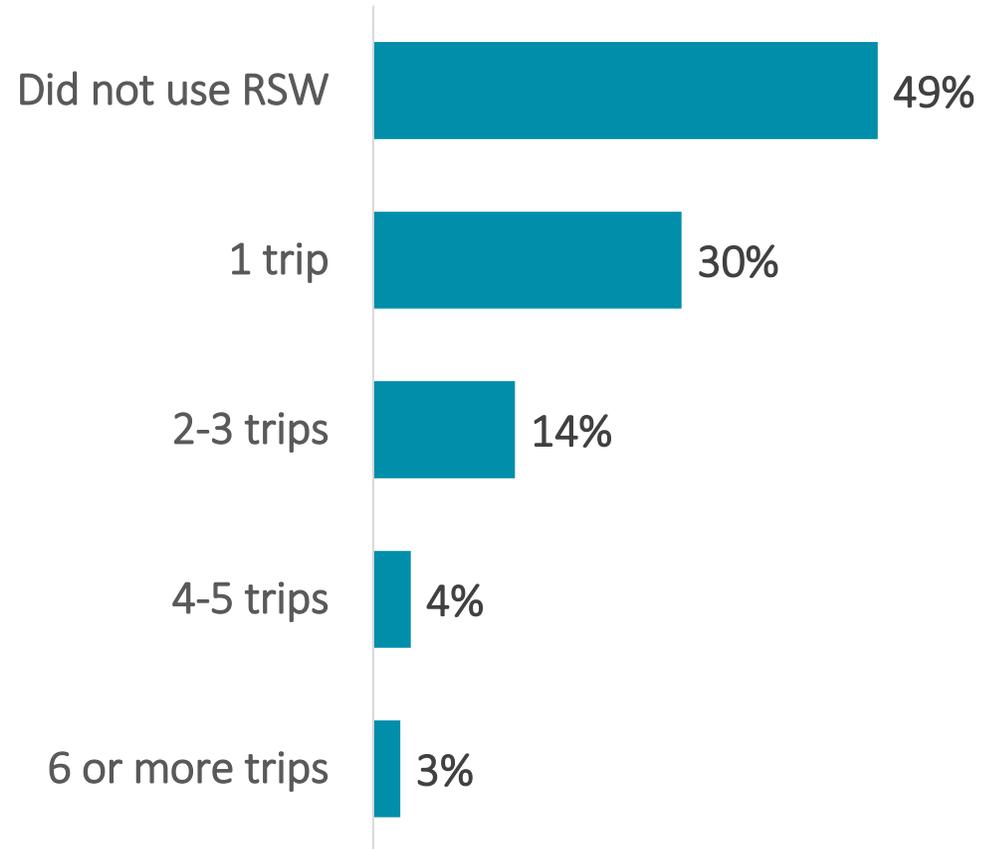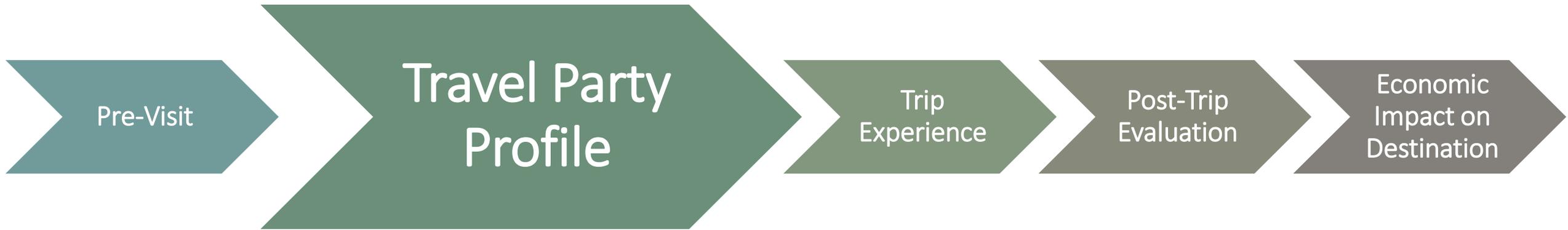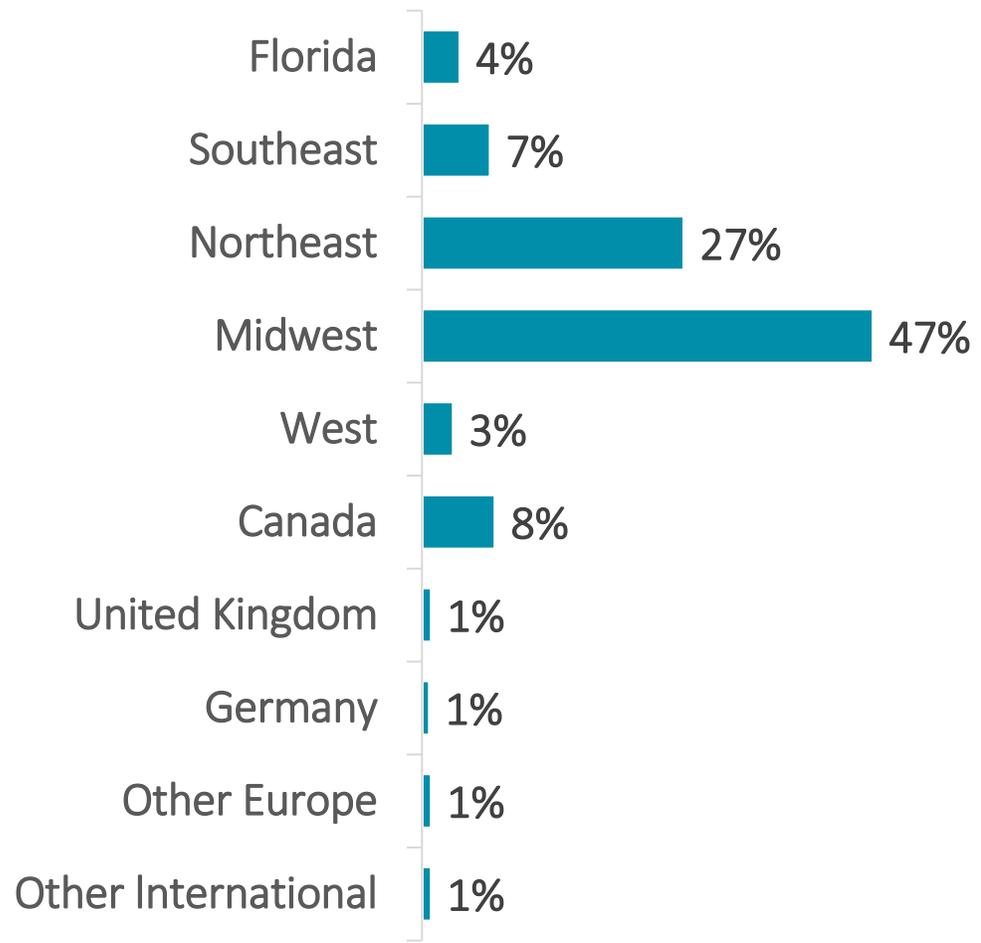
Did not use RSW — 49%

1 trip — 30%

2-3 trips — 14%

4-5 trips — 4%

6 or more trips — 3%

Origin[1]

Florida — 4%
Southeast — 7%
Northeast — 27%
Midwest — 47%
West — 3%
Canada — 8%
United Kingdom — 1%
Germany — 1%
Other Europe — 1%
Other International — 1%

88%
of visitors came from **the US**

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

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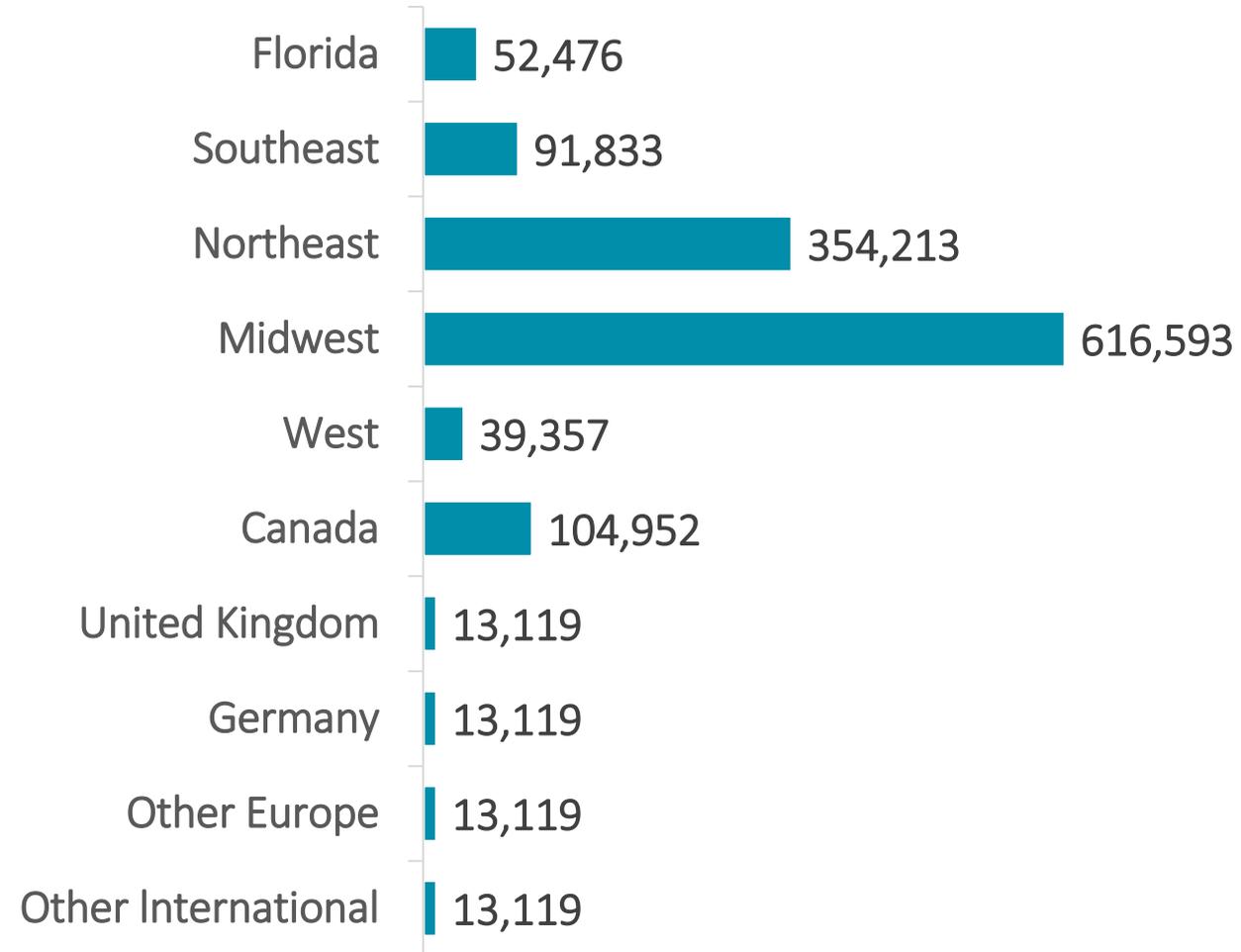
Number of Visitors by Origin

Origin	Visitors
Florida	52,476
Southeast	91,833
Northeast	354,213
Midwest	616,593
West	39,357
Canada	104,952
United Kingdom	13,119
Germany	13,119
Other Europe	13,119
Other International	13,119

January – March 2019

Number of Visitors by Origin

Domestic Out-of-State — 1,101,996

In-State — 52,476

International — 157,428

Domestic Out-of-State — 84%

In-State — 4%

International — 12%

January – March 2019

Origin Country

Country[1]	% of Visitors
United States	88%
Germany	1%
United Kingdom	1%
Canada	8%
Other	2%

[1]1% or fewer visitors came from Switzerland, Sweden, Nova Scotia, Norway, Italy, Ukraine, Dominican Republic, Denmark, Cuba, and Brazil.

Origin Markets[1]

Market	Percentage of Visitors
Minneapolis-St. Paul	9%
New York	6%
Boston	5%
Chicago	5%
Indianapolis	3%
Detroit	3%
Cincinnati	3%
Washington D.C.	3%
Philadelphia	3%
Cleveland-Akron	3%
Naples	2%
Green Bay-Appleton, WI	2%
Milwaukee	2%
Columbus, OH	2%
Buffalo-Rochester	2%
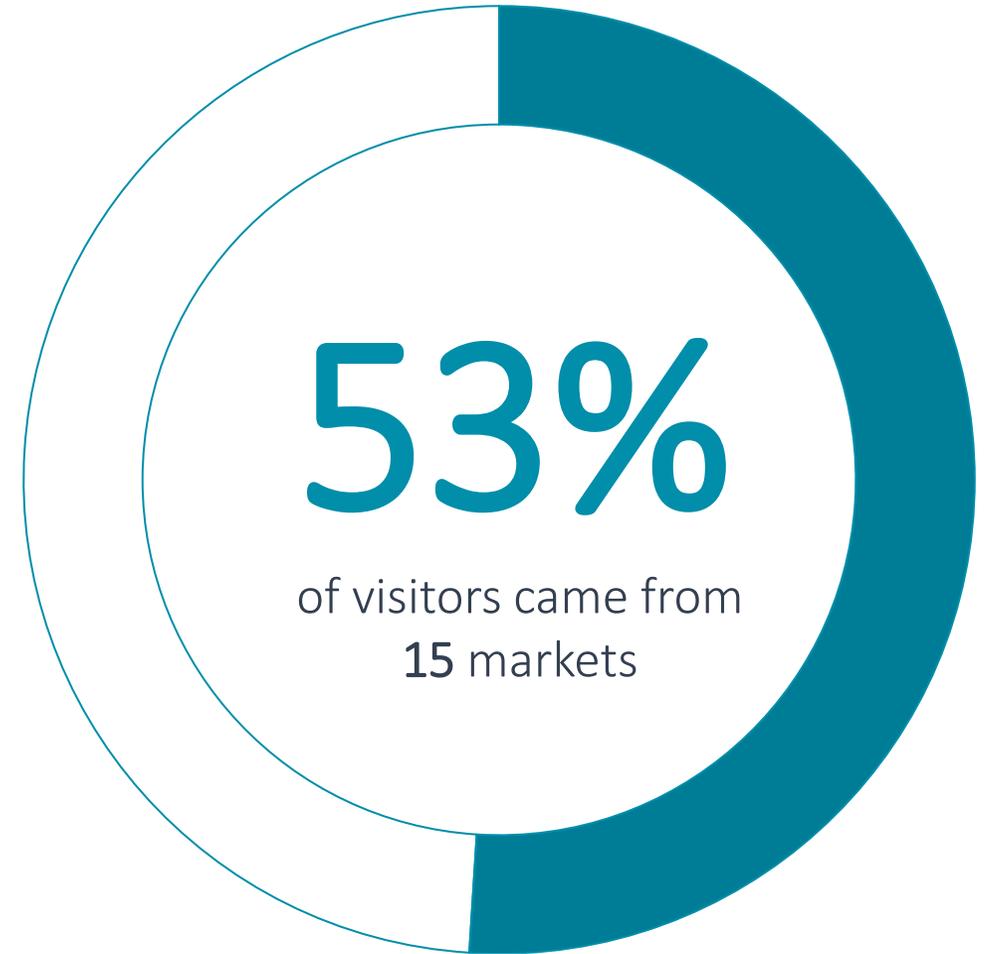
53%

of visitors came from
15 markets

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

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Travel Party Size and Composition

Travel Party Size
Visitors traveled in a party composed of **2.9**[1] people.

Travel with Children
23% of visitors traveled with children under the age of 18.

Solo traveler ▮ 9%

2 people ▮ 56%

3 people ▮ 11%

4 people ▮ 11%

5+ people ▮ 13%
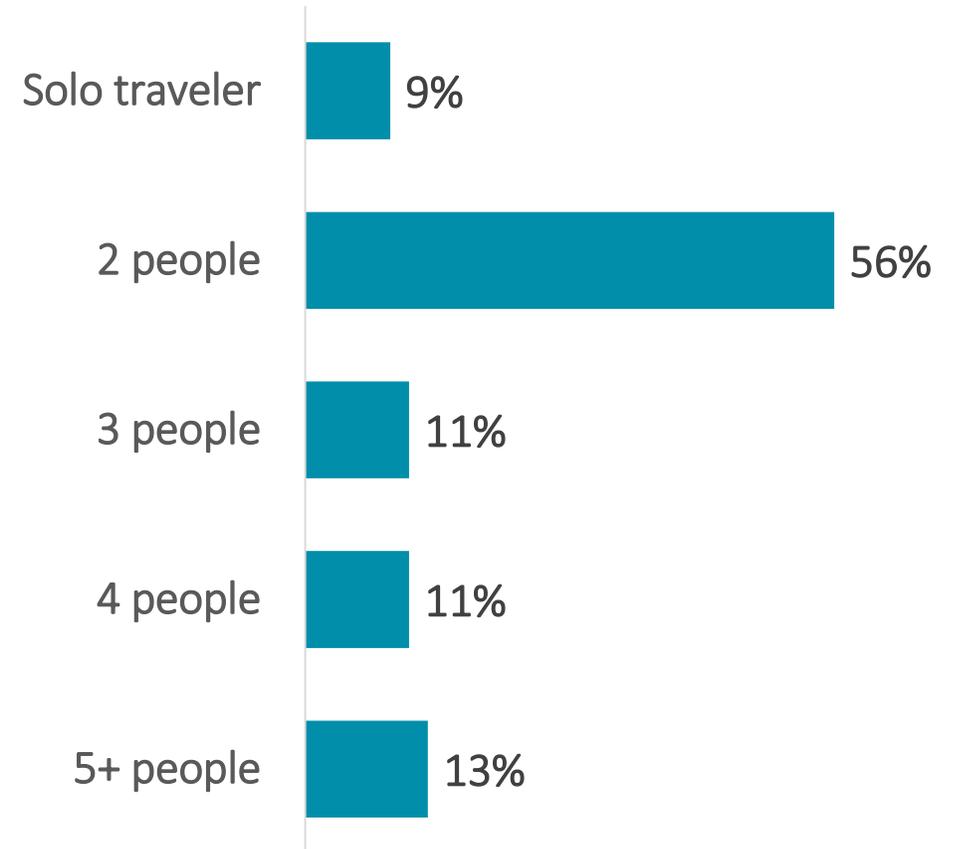
[1]Source: Visitor Tracking Survey, includes all types of visitors

Travel Party Type

49% of visitors traveled as a couple, while **29%** traveled as a family.

Couple	49%
Family	29%
Group of couples/friends	11%
Single	9%
With business associates	1%
In a tour group	1%

January – March 2019

Age
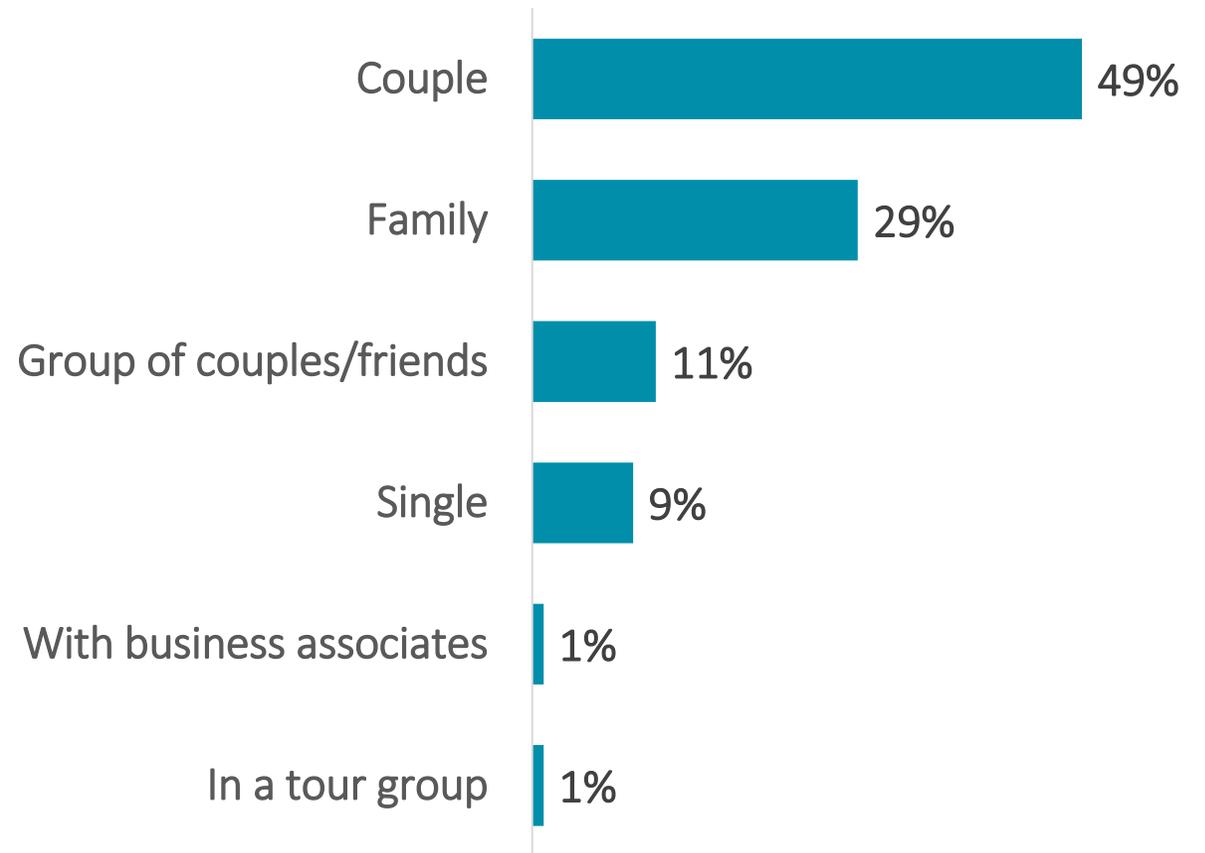
Average Age
The average age of January-March visitors was **60 years old.**

Younger than 25 — 6%

25-39 — 14%

40-54 — 17%

55-69 — 43%

70+ — 20%

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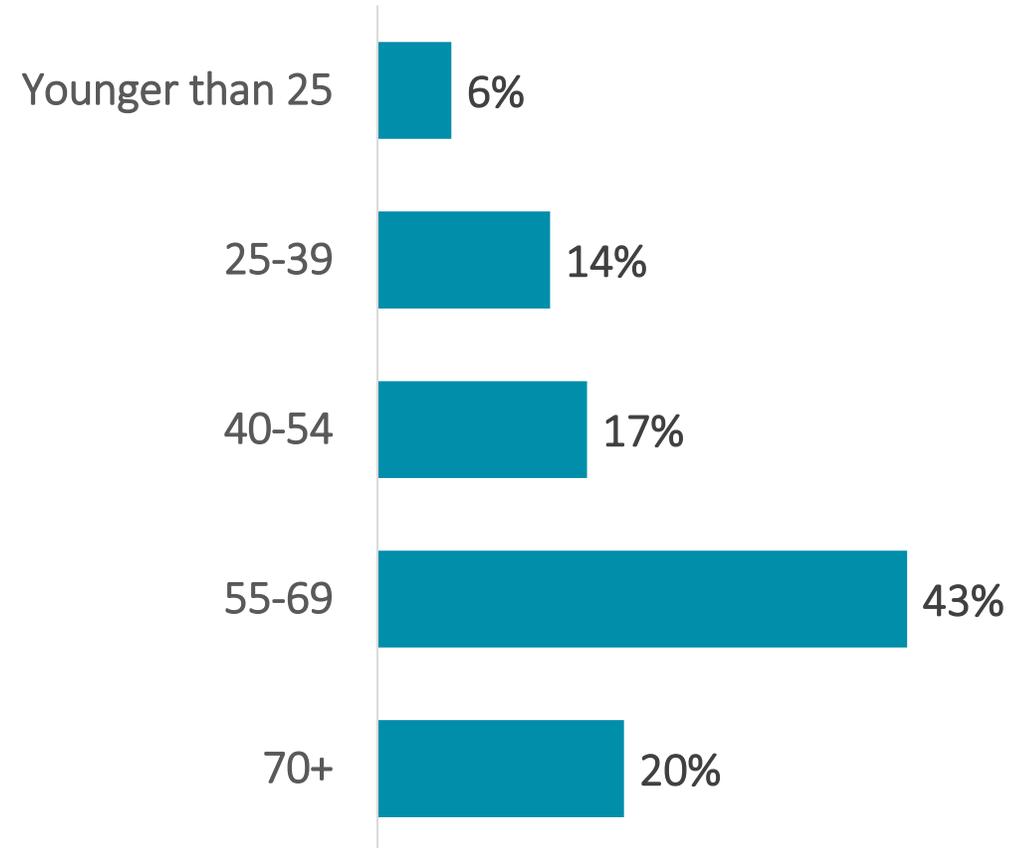
Household Income

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

Income	Percentage
<$50,000	14%
$50,000 - $74,999	17%
$75,000 - $99,999	19%
$100,000 - $124,999	16%
$125,000 - $149,999	9%
$150,000 - $199,999	10%
$200,000 - $249,999	6%
$250,000 and over	9%

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Marital Status

75% Married, 20% Single, 5% Other
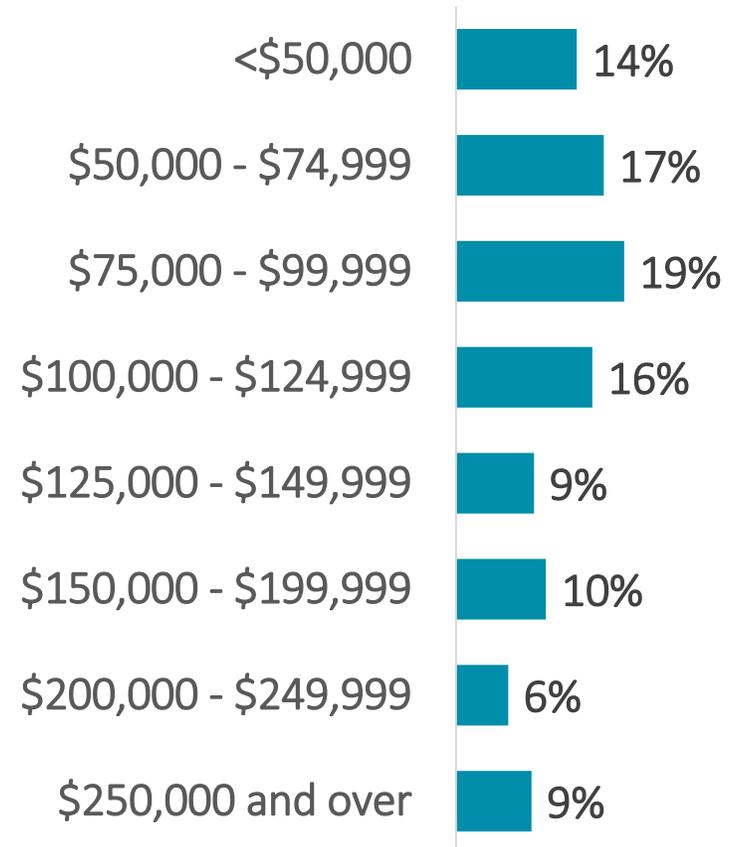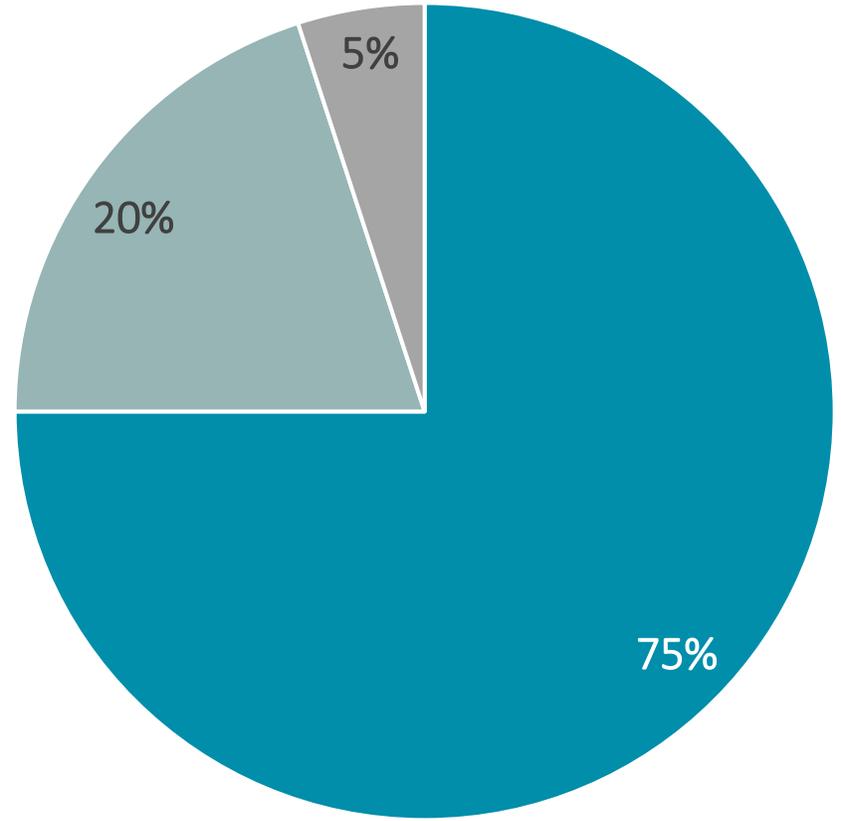
■ Married   ■ Single   ■ Other

Education

College Education
59% of January – March visitors were college graduates.

Some high school or high school degree — 14%

Some college or Associate degree — 27%

College Graduate — 39%

Post Graduate work or degree — 20%

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Race/Ethnicity

Caucasion or white — 92%
Hispanic — 3%
African American — 2%
Asian — 1%
Other — 2%

January – March 2019

Gender

50%   50%

■ Male   ■ Female

January – March 2019

Visitor Journey: Trip Experience

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

January – March 2019

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Accommodations

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

Accommodation	%
Non-paid accommodations	35%
Condo/Vacation rental	29%
Hotel/Motel/Resort/B&B	27%
Day tripper	5%
RV Park/Campground	4%

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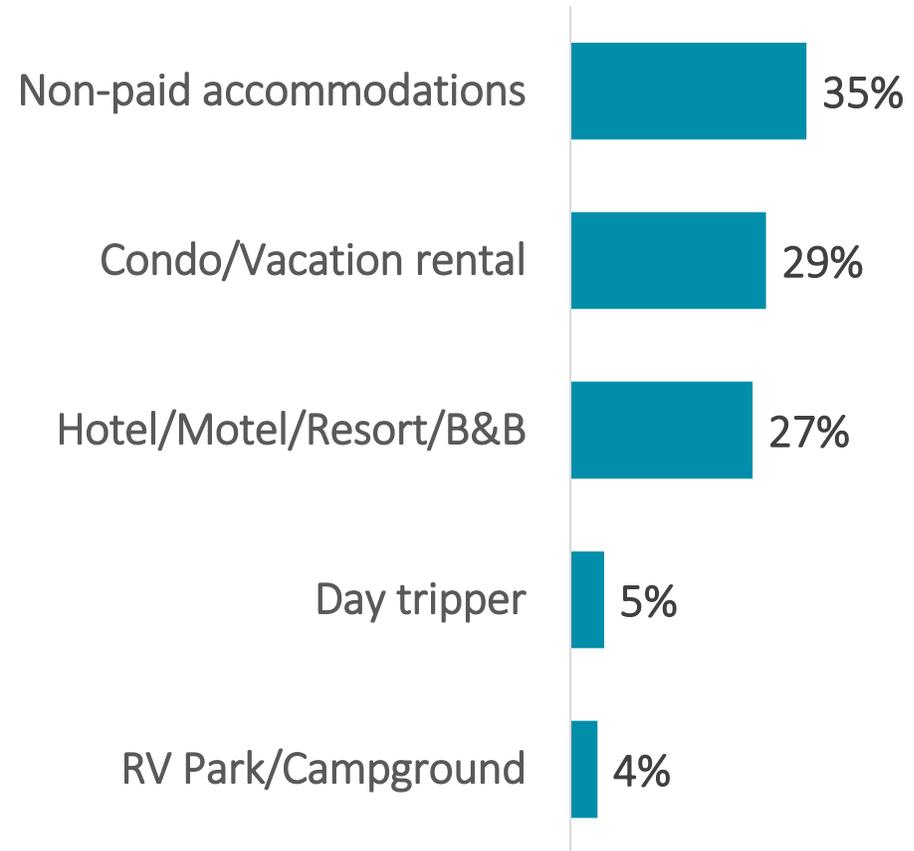
Nights Stayed

All Visitors
Visitors spent **13.4**[1] nights in The Beaches of Fort Myers & Sanibel.

Visitors Staying in Paid Accommodations
Visitors staying in paid accommodations spent **12.5**[1] nights in The Beaches of Fort Myers & Sanibel.

[1] Source: Visitor Tracking Survey, includes all types of visitors
Nights stayed capped at 30 nights. Average length of stay is 23.4 nights for all visitors and 19.7 nights for visitors staying in paid accommodations when nights stayed is not capped.

	All Visitors	Visitors Staying in Paid Accommodations
1 night	6%	2%
2-3 nights	9%	10%
4-5 nights	14%	17%
6-9 nights	30%	33%
10-15 nights	14%	16%
16-30 nights	4%	10%
More than 30 nights	23%	12%

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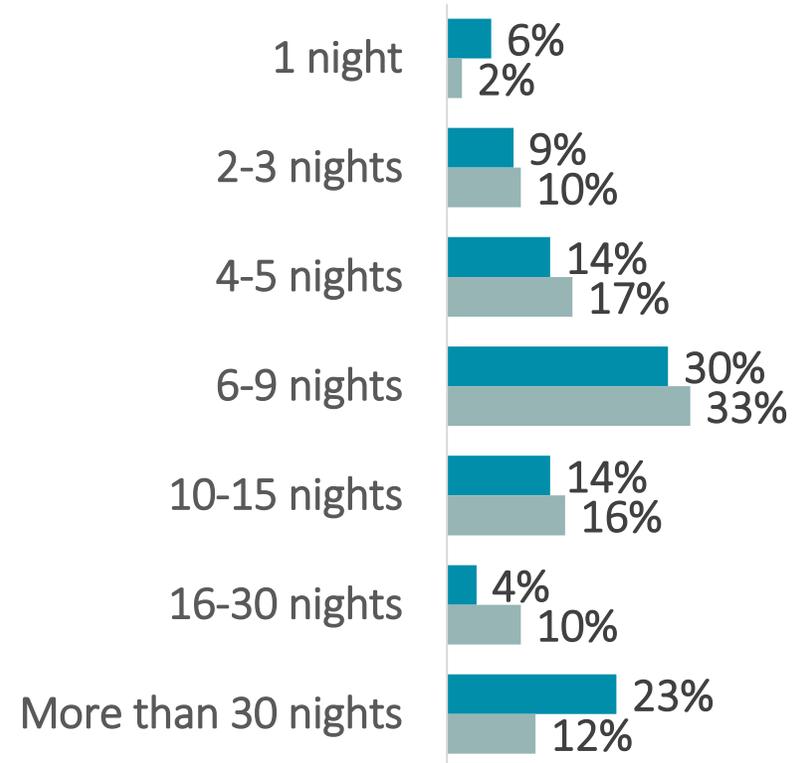
First Time and Experienced Visitors

First Time vs. Repeat Visitors
77% of visitors were repeat visitors, while **23%** were visiting for the first time.

First-time — 23%

2-5 visits — 34%

6-10 visits — 18%

11+ visits — 25%

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Visitor Activities

Activity	Percent
Beaches	75%[1]
Relax & unwind	69%
Dining	62%
Shopping	48%
Visiting friends/relatives	39%
Nature, environment, bird watching	24%
Water sports	23%
Biking, hiking etc.	21%
Attractions	19%
Golf or tennis	19%
Bars, nightlife	18%
Fishing	14%
Sporting event	12%
Photography	12%
Culture	10%
Guided tours	7%
Special event	6%
Museums, history, etc.	6%
Spas	2%
Diving/snorkeling	2%
Special occasion	2%
Business conference or meeting	1%

[1]Multiple responses permitted.

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Reason for Visiting vs. Visitor Activities

Reason for Visiting		Visitor Activities

Key Reasons for Visiting

- 46%[1] — Beaches — 75%[2]
- 44% — Relax & unwind — 69%
- 31% — Visiting friends — 39%

Trip Enhancements

- 7% — Sporting event — 12%
- 6% — Nature — 24%
- 5% — Biking, hiking — 21%
- 4% — Fishing — 14%
- 3% — Shopping — 48%
- 3% — Attractions — 19%
- 3% — Golf or tennis — 19%
- 2% — Water sports — 23%
- 2% — Culture — 10%
- 1% — Photography — 12%

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

THE BEACHES OF FORT MYERS AND SANIBEL

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Attractions Visited

Attraction	Percentage
Beaches	75%[1]
Fort Myers Beach Pier	39%
Sanibel Lighthouse	26%
Edison & Ford Winter Estates	24%
Miromar Outlets Mall	20%
Sanibel Outlets	19%
J.N. Ding Darling National Wildlife Refuge	16%
Bell Tower Shops	10%
Periwinkle Place	10%
Coconut Point Mall	9%
Manatee Park	8%
Shell Factory and Nature Park	8%
Gulf Coast Town Center	7%
Barbara B. Mann Performing Arts Hall	4%
Bailey-Matthews Shell Museum	3%
Broadway Palm Dinner Theater	3%
Other	8%
None	12%

[1]Multiple responses permitted.

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Community Stayed

Community	Percentage
Fort Myers	26%
Fort Myers Beach	19%
Sanibel Island	16%
Cape Coral	14%
Bonita Springs	7%
North Fort Myers	3%
Captiva Island	2%
Other	7%
None/not staying overnight	5%

January – March 2019

Visitor Journey: Post-Trip Evaluation

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

January – March 2019

Satisfaction

Likely to recommend — 92%

Likely to return — 89%

Likely to return next year — 75%

January – March 2019

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Satisfaction Ratings

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2018	2019	2018	2019	2018	2019	2018	2019
Likely to Recommend	82%	85%	92%	95%	92%	93%	86%	89%
Likely to Return	88%	76%	95%	94%	95%	92%	90%	88%
Likely to Return Next Year	35%	42%	78%	81%	73%	75%	57%	76%

January – March 2019

Satisfaction

Satisfaction with Overall Visit: Very satisfied 64%, Satisfied 32%, Neither 2%, Dissatisfied/Very dissatisfied 1%, Don't know 1%

Satisfaction with Customer Service: Very satisfied 54%, Satisfied 35%, Neither 4%, Dissatisfied/Very dissatisfied 1%, Don't know 6%

Legend: Very satisfied ■ Satisfied ■ Neither ■ Dissatisfied/Very dissatisfied ■ Don't know ■
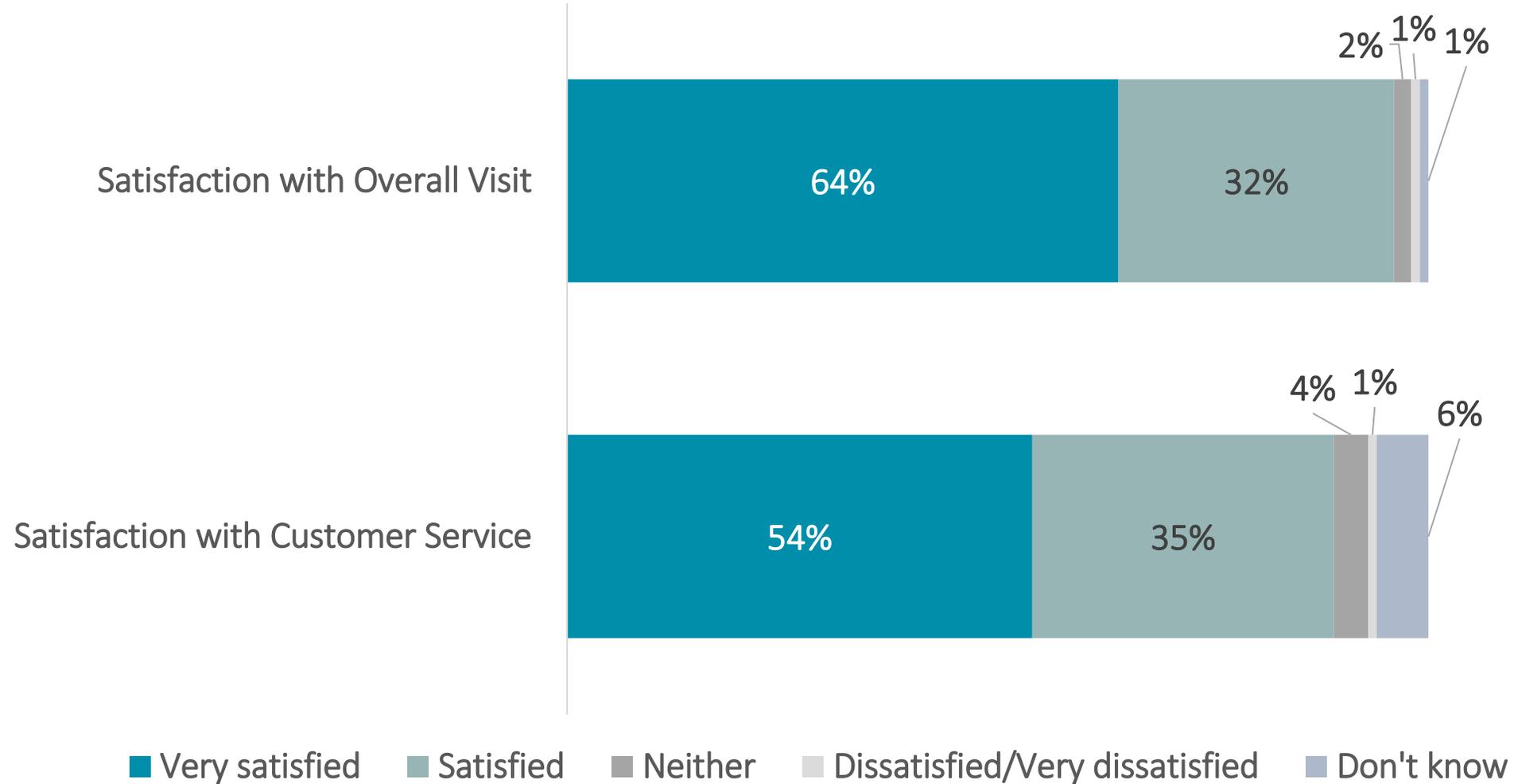
Satisfaction Ratings: Overall Visit

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2018	2019	2018	2019	2018	2019	2018	2019
Very Satisfied	39%	48%	60%	69%	58%	66%	57%	70%
Satisfied	55%	47%	35%	28%	37%	31%	38%	27%

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Satisfaction Ratings: Customer Service

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2018	2019	2018	2019	2018	2019	2018	2019
Very Satisfied	42%	44%	41%	61%	42%	57%	45%	58%
Satisfied	47%	46%	46%	32%	46%	36%	42%	31%

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Satisfaction Ratings: Quality of Accommodations

Quality of Accommodations
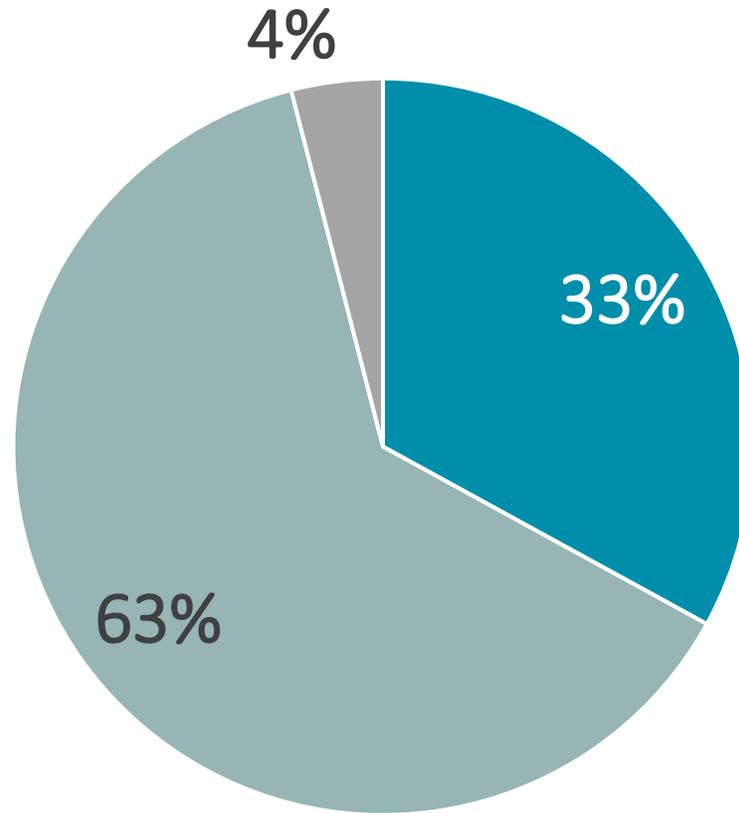
- Exceeded expectations
- Met expectations
- Did not meet expectations

33%
63%
4%

Post-Trip Evaluation
January – March 2019

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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	34%	34%	32%	35%	34%	34%	20%	27%
Met Expectations	59%	64%	59%	62%	59%	63%	63%	62%
Did Not Meet Expectations	7%	3%	8%	3%	8%	3%	18%	12%

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Attribute Ratings

Over **9 in 10** visitors gave high experience ratings for warm weather, peace, and safety in The Beaches of Fort Myers & Sanibel.
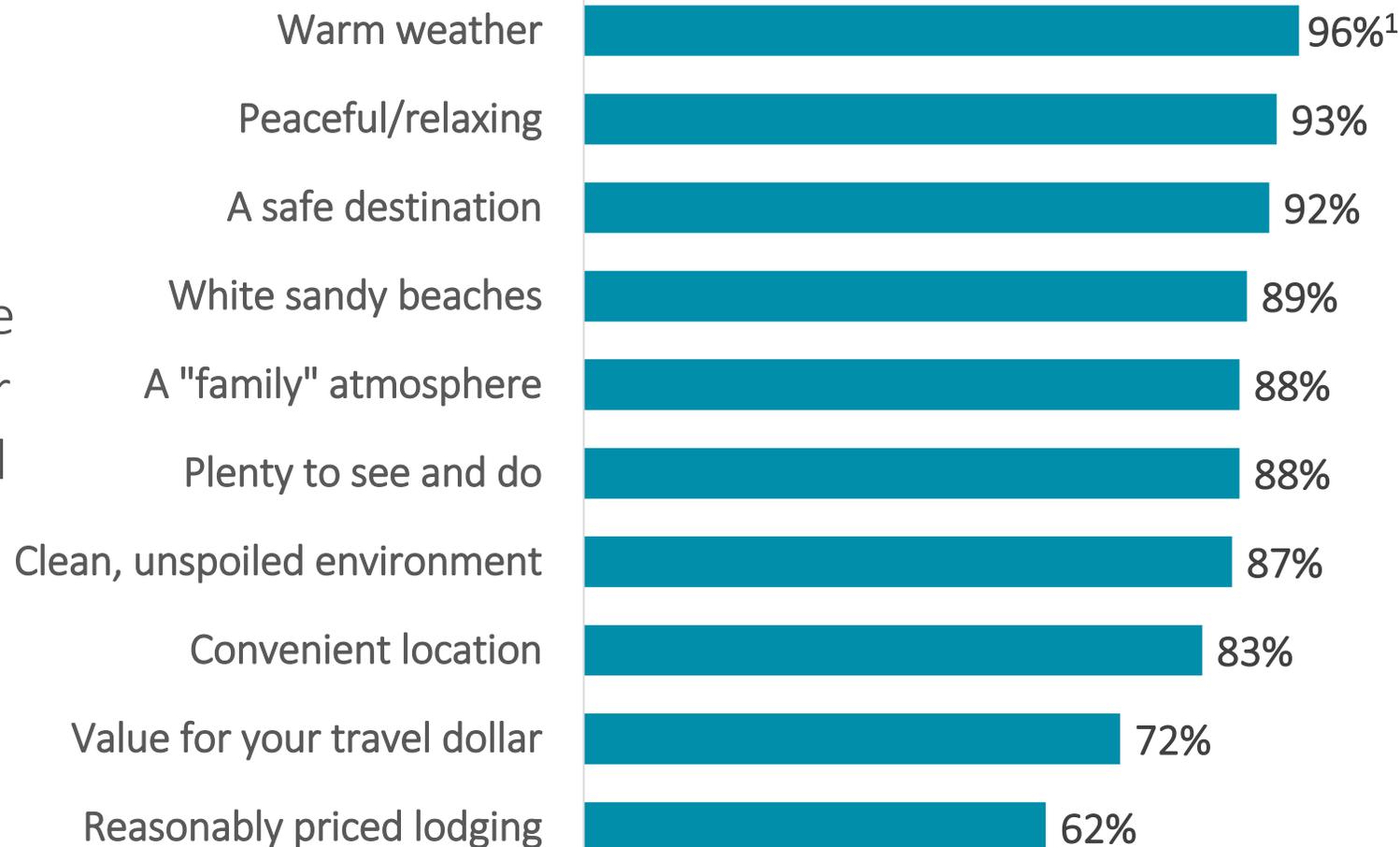
Attribute	Rating
Warm weather	96%[1]
Peaceful/relaxing	93%
A safe destination	92%
White sandy beaches	89%
A "family" atmosphere	88%
Plenty to see and do	88%
Clean, unspoiled environment	87%
Convenient location	83%
Value for your travel dollar	72%
Reasonably priced lodging	62%

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

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Vacation Attribute Influence vs. Ratings

Vacation Influencers[1]		Fort Myers/Sanibel Ratings[2]
92%	Warm weather	96%
86%	Peaceful/relaxing	93%
80%	A safe destination	92%
80%	White sandy beaches	89%
76%	Convenient location	83%
75%	Clean, unspoiled environment	87%
73%	Plenty to see and do	88%
64%[1]	A "family" atmosphere	88%[2]
61%	Value for your travel dollar	72%
51%	Reasonably priced lodging	62%
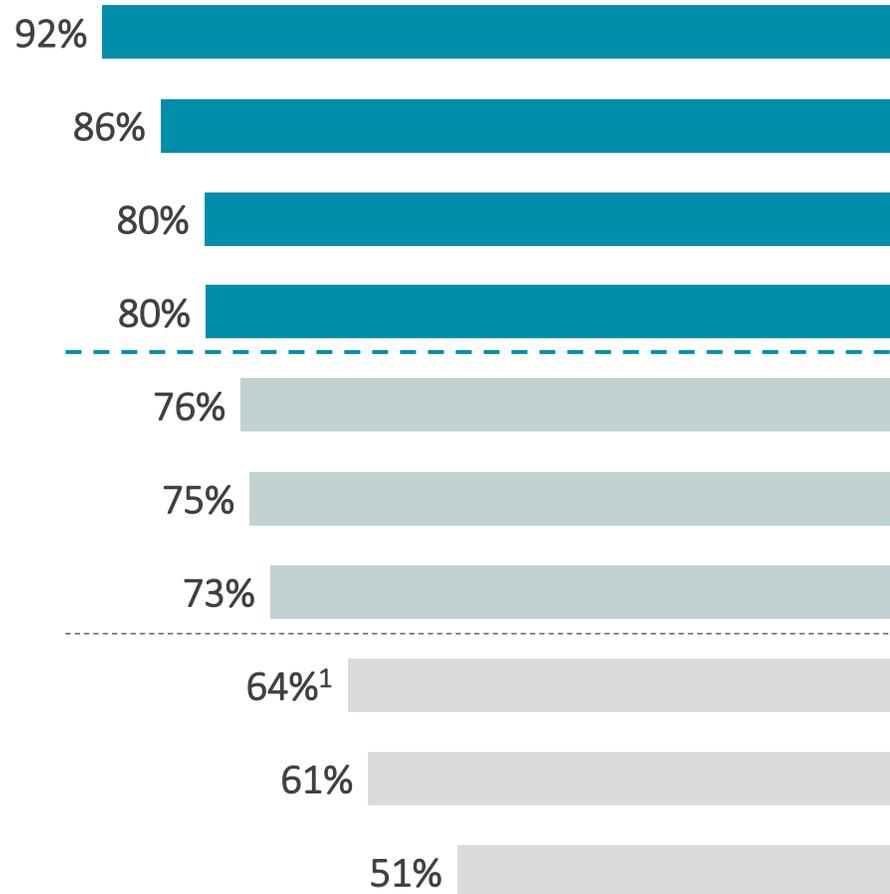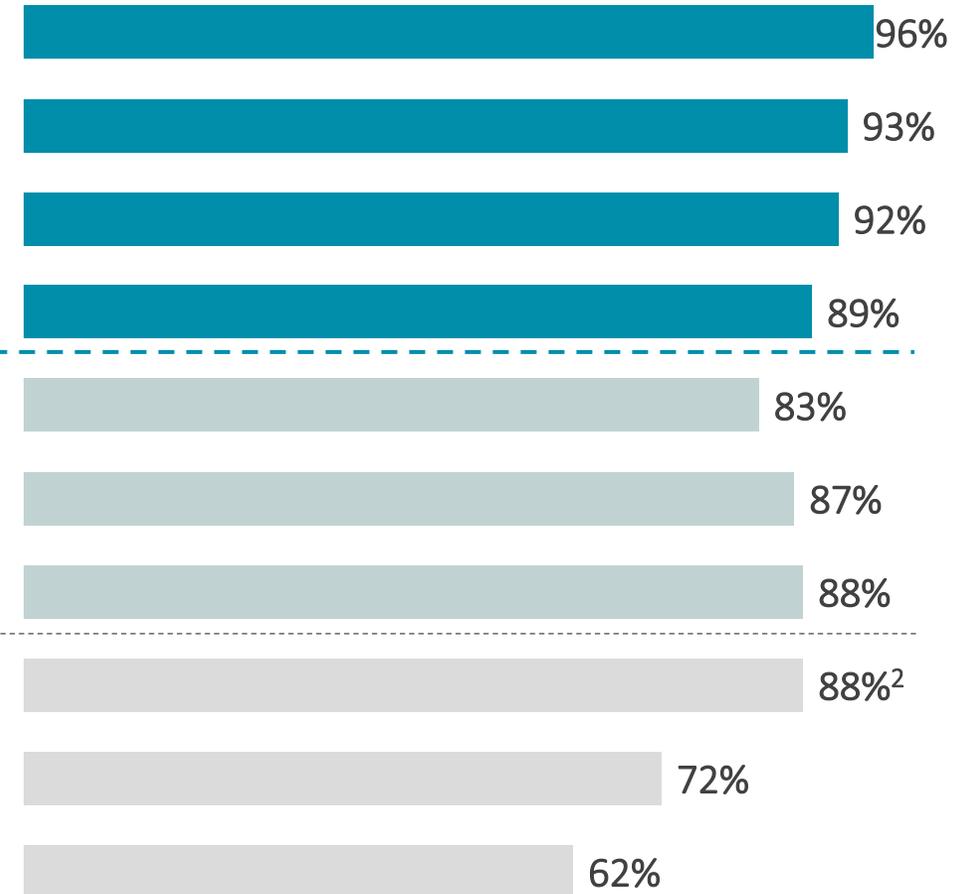
[1]Top 2 box scores. Attributes rated on a scale from 1 to 5 where 1 is Not at All Influential and 5 is Definitely Influential.
[2]Top 2 box scores. Attributes rated on a scale from 1 to 5 where 1 is Poor and 5 is Excellent.

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Visitor Concerns

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

Traffic 56%[1]
High prices 14%
Beach seaweed 14%
Red Tide 13%
Insects 9%
Water quality 7%
Weather 3%[1]
Quality of accomodations 3%
Lack of nightlife 3%
Other 2%
Nothing 22%

[1]Multiple responses permitted.

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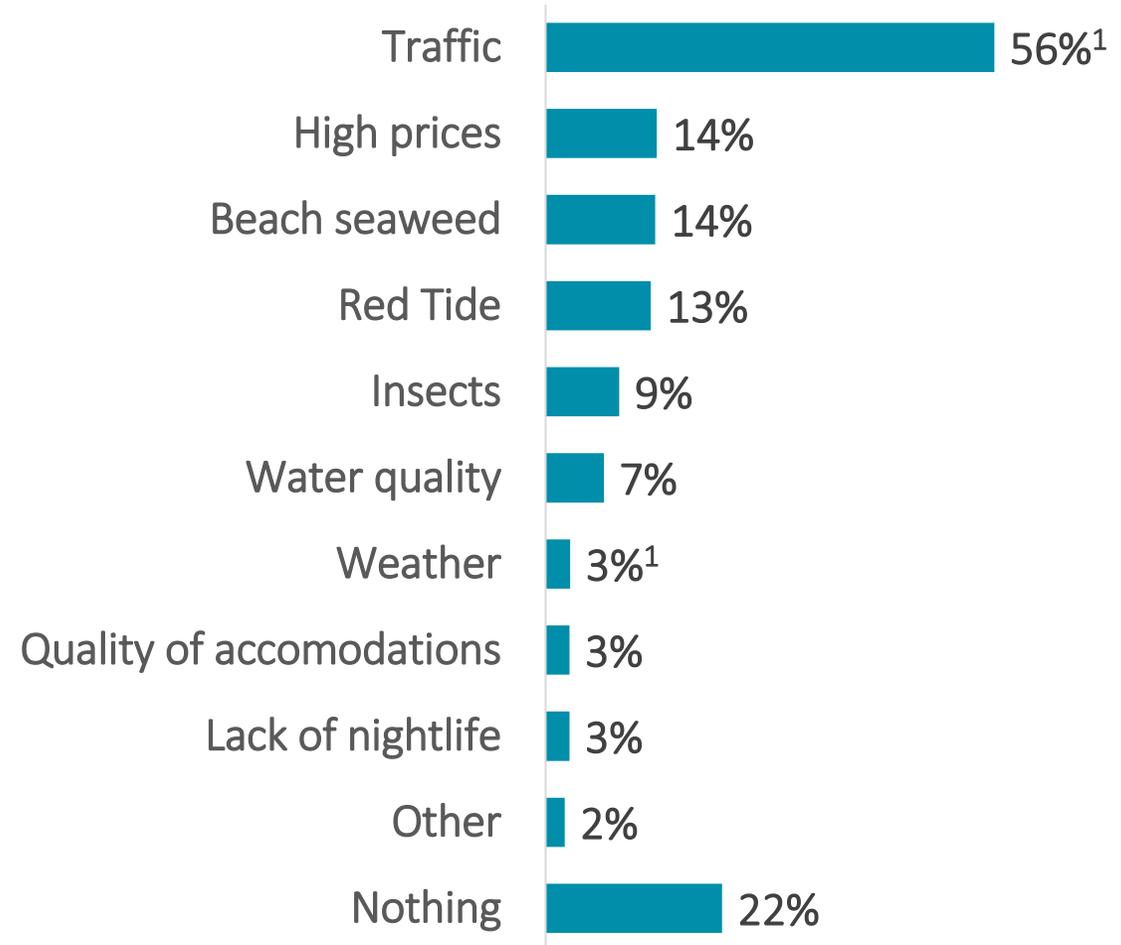
Area Descriptions

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

Description	%
Wonderful place to visit	43%[1]
Relaxing & peaceful	15%
Beautiful beaches	12%
Warm weather	12%
Fun and exciting	10%
Crowded, lots of traffic	8%
Friendly people	6%
Clean	4%
Family friendly	4%
Nice restaraunts	3%
Natural	3%
Convenient, walkable	2%
Safe	2%
Great geographic location	2%
Boring	2%
Water quality/seaweed issues	2%
Good place to retire	1%
Expensive	1%

[1]Coded verbatim responses; multiple responses permitted.

THE BEACHES OF FORT MYERS AND SANIBEL

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Area Descriptions

Wonderful place to visit

- "We are living our best lives and this is the place to do it. We have been to other areas in Florida before, and we like this area much more. It has a slower pace but at the same time it is exciting."
- "It's so good that we don't want to go home."
- "Great place to take the family because it has a little slower pace to allow you to unwind."

Relaxing and peaceful

- "Relaxing, change of pace from northern weather, outdoorsy oriented."
- "It's peaceful, beautiful and filled with nature."
- "Very calming and peaceful; a nice place to unwind."

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Area Descriptions

Beautiful beaches

- "The beach is beautiful. It's a great feeling to look out your window and see the ocean. Very relaxing."
- "My husband and I think Fort Myers Beach has some of the most beautiful ocean waters. We do a lot of traveling and must say that these blue waters are very impressive."
- "Beautiful clean sandy beaches."

Warm weather

- "Being I'm from New York we love the warm weather and the fact that there are beautiful beaches here. A great place to visit and get away from all the hustle and bustle from home."
- "Sunny and warm. Well kept, clean, beautiful."
- "Weather is excellent and walking conditions are excellent."

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Occupancy Barometer: April – June Reservations

April – June Reservations	Jan – March 2018	Jan – March 2019
Up	32%	19%
Same	39%	39%
Down	16%	38%
Not Sure	13%	5%

Occupancy Barometer: July – September Reservations

July – Sept Reservations	Jan – Mar 2018	Jan – Mar 2019
Up	27%	12%
Same	53%	44%
Down	11%	35%
Not Sure	9%	9%

Quarterly Comparisons

Economic Impact

Visitor & Lodging Statistics	Jan – Mar 2018	Jan – Mar 2019	% Change
Visitors	1,367,100	1,311,900	-4.0%
Room Nights	1,800,600	1,848,200	+2.6%
Direct Expenditures	$1,191,982,100	$1,251,828,600	+5.0%
Total Economic Impact	$1,935,778,900	$2,032,969,600	+5.0%
Occupancy	88.8%	86.3%	-2.8%
ADR	$172.32	$213.96	24.2%
RevPAR	$153.03	$184.65	20.7%

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Jobs, Wages and Taxes Supported by Tourism

	January – March 2018	January – March 2019
Direct Jobs	16,248	16,851
Total Jobs	22,677	23,423
Direct Wages	$369,300,000	$391,224,900
Total Wages	$599,700,000	$639,734,400
Direct Local Taxes	$40,300,000	$41,435,500
Total Local Taxes	$71,300,000	$71,763,800
Direct State Taxes	$86,800,000	$89,005,000
Total State Taxes	$128,800,000	$133,769,400

Visitor Type

Visitor Type	Jan – Mar 2018	Jan – Mar 2019
Visitors in Paid Accommodations	65%	60%
Visitors in Non-Paid Accommodations	35%	35%
Day Trippers	NA	5%

Economic Impact
January – March 2019

Pre-Visit

Planned trip in advance	January – March 2018	January – March 2019
1 week or less	2%	8%
2-4 weeks	2%	8%
1-2 months	19%	18%
3-6 months	27%	29%
6 months or more	40%	37%

Considered Other Destinations	January – March 2018	January – March 2019
Yes	20%	17%
No	80%	83%

Pre-Visit

Trip Planning Websites	January – March 2018	January – March 2019
Airline websites	34%	24%
Search engines	25%	20%
Trip Advisor	22%	18%
Airbnb, VRBO, HomeAway	16%	16%
Hotel websites	23%	15%
Booking websites	18%	14%
Vacation rental websites	15%	10%
Facebook	7%	6%
www.FortMyers-Sanibel.com	8%	5%
Visit Florida	5%	4%
Beaches of Fort Myers & Sanibel Social Media	NA	3%
Travel reviews, blogs, stories, etc.	NA	3%
Instagram	NA	2%
YouTube, Hulu, Pandora	NA	2%
Other	9%	8%
None/Don't visit websites	21%	31%

Pre-Visit

Information Requests	January – March 2018	January – March 2019
Call hotel/motel/condo	9%	8%
Visitor guide	3%	2%
Call VCB	1%	2%
Call local Chamber of Commerce	1%	2%
Fort Myers-Sanibel E-newsletter	1%	1%
Other	9%	8%
None/Did not request info	76%	79%

Pre-Visit

Recall of Lee County Promotions	January – March 2018	January – March 2019
Yes	40%	35%
No	40%	50%
Can't recall	19%	14%

Characteristics influencing decision to visit Lee County (top 2 boxes)	January – March 2018	January – March 2019
Warm weather	93%	92%
Peaceful/relaxing	81%	86%
A safe destination	72%	80%
White sandy beaches	79%	80%
Convenient location	71%	76%
Clean, unspoiled environment	68%	75%
Plenty to see and do	63%	73%
A "family" atmosphere	52%	64%
Value for your travel dollar	60%	61%
Reasonably priced lodging	47%	51%

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Travel Party Profile

Transportation	January – March 2018	January – March 2019
Fly	66%	64%
Drive a personal vehicle	28%	32%
Drive a rental vehicle	3%	2%
Drive a RV	3%	2%
Other	1%	<1%

Airport Used	January – March 2018	January – March 2019
Southwest Florida International	85%	80%
Punta Gorda	6%	9%
Orlando International	2%	3%
Ft. Lauderdale International	3%	2%
Miami International	1%	2%
Tampa International	2%	<1%
Other	1%	1%

Travel Party Profile

Visitor Origin	January – March 2018	January – March 2019
Florida	1%	4%
Southeast	12%	7%
Northeast	26%	27%
Midwest	48%	47%
West	2%	3%
Canada	7%	8%
United Kingdom	1%	1%
Germany	1%	1%
Other Europe	1%	1%
Other international	1%	1%

Visitor Origin	January – March 2018	January – March 2019
Minneapolis-Saint Paul	9%	9%
New York	7%	6%
Chicago	5%	5%
Boston	4%	5%

Travel Party Profile

Travel Parties	January – March 2018	January – March 2019
Mean travel party size	3.0	2.9[1]
Travel with children under age 18	26%	23%

Travel Party Composition	January – March 2018	January – March 2019
Couple	49%	49%
Family	28%	29%
Group of couples/friends	10%	11%
Single	9%	9%
In a tour group	1%	1%
With business associates	1%	1%

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

Travel Party Profile

Marital Status	January – March 2018	January – March 2019
Married	76%	75%
Single	10%	20%
Other	11%	5%

Age	January – March 2018	January – March 2019
Average age	57	60

Household Income	January – March 2018	January – March 2019
<$50,000	10%	14%
$50,000 - $74,999	17%	17%
$75,000 - $99,999	20%	19%
$100,000 - $124,999	17%	16%
$125,000 - $149,999	9%	9%
$150,000 - $199,999	11%	10%
$200,000 - $249,999	6%	6%
$250,000 and over	10%	9%

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Trip Experience

Length of Stay	January – March 2018	January – March 2019
Average nights in The Beaches of Fort Myers & Sanibel	15.3	13.4[1]

First time/Repeat Visitors	January – March 2018	January – March 2019
First-time	15%	23%
Repeat	82%	77%

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

Trip Experience

Activities	January – March 2018	January – March 2019
Beaches	92%	75%
Relax & unwind	74%	69%
Dining	77%	62%
Shopping	56%	48%
Visiting friends/relatives	43%	39%
Nature, environment, bird watching (2018: Watching wildlife)	25%	24%
Water sports (2018: boating, kayaking/canoeing, and parasailing/jet skiing were separate categories)	23%	23%
Biking, hiking etc.	24%	21%
Attractions	21%	19%
Golf or tennis (2018: Golf and tennis were separate categories)	22%	19%
Bars, nightlife	20%	18%
Fishing	12%	14%
Sporting event	14%	12%
Photography	15%	12%
Culture	7%	10%
Guided tours	8%	7%
Special event	NA	6%
Museums, history, etc.	NA	6%
Spas	NA	2%
Diving/snorkeling	2%	2%
Special occasion	NA	2%
Business conference or meeting	NA	1%
Other	3%	4%

Trip Experience

Attractions	January – March 2018	January – March 2019
Beaches	84%	75%
Fort Myers Beach Pier	42%	39%
Sanibel Lighthouse	24%	26%
Edison & Ford Winter Estates	28%	24%
Miromar Outlets Mall	27%	20%
Sanibel Outlets	22%	19%
J.N. Ding Darling National Wildlife Refuge	15%	16%
Bell Tower Shops	14%	10%
Periwinkle Place	12%	10%
Coconut Point Mall	8%	9%
Manatee Park	10%	8%
Shell Factory and Nature Park	8%	8%
Gulf Coast Town Center	9%	7%
Barbara B. Mann Performing Arts Hall	3%	4%
Bailey-Matthews Shell Museum	2%	3%
Broadway Palm Dinner Theater	2%	3%
None	6%	12%
Other	8%	8%

Trip Experience

Area stayed	January – March 2018	January – March 2019
Fort Myers	23%	26%
Fort Myers Beach	18%	19%
Sanibel Island	22%	16%
Cape Coral	12%	14%
Bonita Springs	5%	7%
North Fort Myers	4%	3%
Captiva Island	1%	2%
Other	10%	8%
None/not staying overnight	5%	5%

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Post-Trip Evaluation

Loyalty metrics	January – March 2018	January – March 2019
Likely to recommend	91%	92%
Likely to return	94%	89%
Likely to return next year	72%	75%

Satisfaction with Accommodations	January – March 2018	January – March 2019
Exceeded expectations	32%	33%
Met expectations	59%	63%
Did not meet expectations	6%	4%

Post-Trip Evaluation

Satisfaction with Visit	January – March 2018	January – March 2019
Very satisfied	56%	64%
Satisfied	40%	32%
Neither	1%	2%
Dissatisfied/Very dissatisfied	1%	1%
Don't know	2%	1%

Satisfaction with Customer Service	January – March 2018	January – March 2019
Very satisfied	41%	54%
Satisfied	46%	35%
Neither	5%	4%
Dissatisfied/Very dissatisfied	0%	1%
Don't know	7%	6%

Trip Experience

Visitor Concerns	January – March 2018	January – March 2019
Traffic	55%	56%
High prices	12%	14%
Beach seaweed	4%	14%
Red Tide	8%	13%
Insects	6%	9%
Water quality	6%	7%
Weather	7%	3%
Quality of accommodations	3%	3%
Lack of nightlife	3%	3%
Other	5%	2%
Nothing	28%	22%

Methodology

Methodology

- Visitor Tracking Study
  - Internet survey & in-person interviews in public areas, hotels, & at events around Lee County
  - Sample size: 1,165 completed interviews
  - Target individuals: January – March visitors to Lee County
  - Data Collection: January 2019 – March 2019

- Occupancy Study
  - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc.
  - Sample Size – data from 10,039 units reporting to DSG (91 properties), and 9,557 hotel units reporting to STR (80 properties)
  - Data Collection: April 2019 (for January – March 2019)

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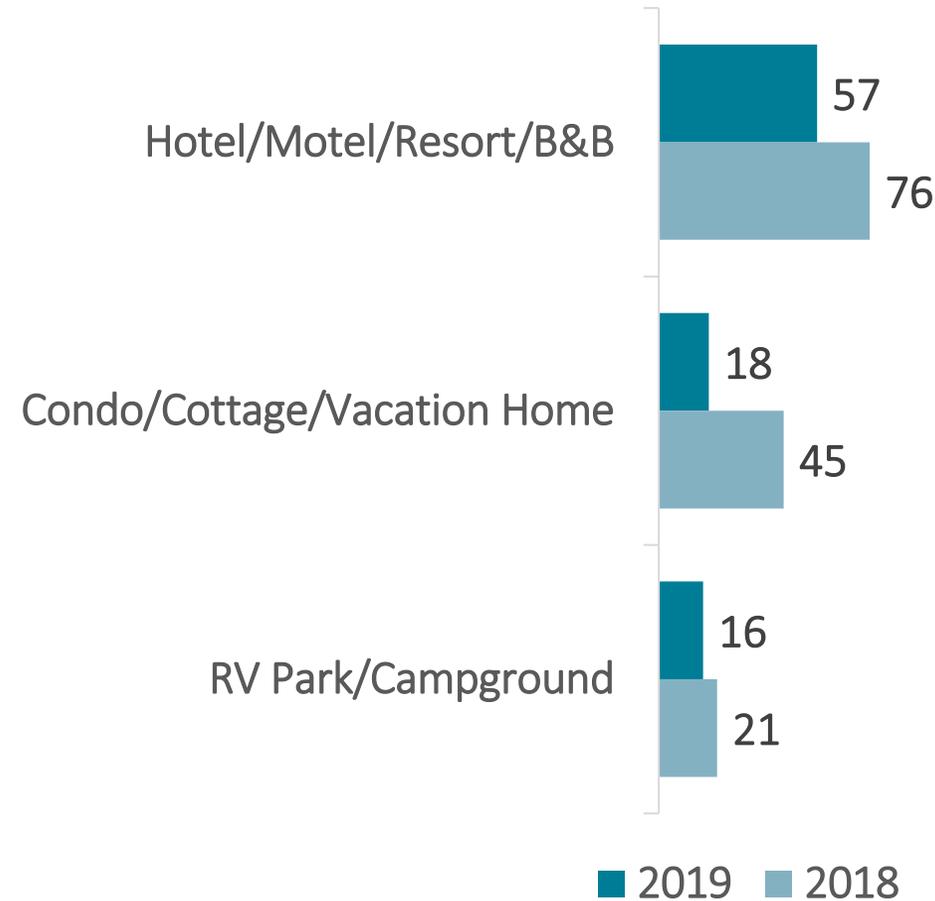
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Methodology

- 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: 1,165 completed interviews
    - Target individuals: January – March visitors to Lee County
    - Data Collection: January 2019 – March 2019
  - Occupancy Study
    - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc., and the STR Report
    - Sample Size – data from 10,039 units reporting to DSG (91 properties), and 9,557 hotel units reporting to STR (80 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 – 91 completed interviews
    - Data Collection: April 2019 (for Jan – Mar 2019)
  - Total Sample Size – data from 10,039 hotel/rental/campground units reporting to DSG (representing 91 properties) and 9,557 hotel units reporting to STR (representing 80 properties)

Number of Interviews

Hotel/Motel/Resort/B&B
- 2019: 57
- 2018: 76

Condo/Cottage/Vacation Home
- 2019: 18
- 2018: 45

RV Park/Campground
- 2019: 16
- 2018: 21

■ 2019 ■ 2018

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Methodology

- **1,165** visitor interviews were completed in the following areas:

269 — Fort Myers Beach: The Pier, Times Square, Outrigger Beach Resort

480 — Fort Myers: Jet Blue Park, CenturyLink Sports Complex, Centennial Park, RSW, Edison-Ford Winter Estates, Hampton Inn & Suites Fort Myers

208 — Sanibel: Lighthouse Beach, Castaways Cottages, Beachview Cottages, West Wind Inn, Tween Waters

163 — Cape Coral/North Fort Myers: Yacht Club Community Park, The Shell Factory, North Fort Myers

45 — Bonita Springs: Bonita Beach, Estero

January – March 2019

The Beaches of Fort Myers & Sanibel

Lee County VCB

January – March 2019
Visitor Tracking & Occupancy Study

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