The Beaches of Fort Myers & Sanibel

Lee County VCB

July – September 2020
Visitor Tracking, Occupancy & Economic Impact Study

Phillip Downs, Ph.D.
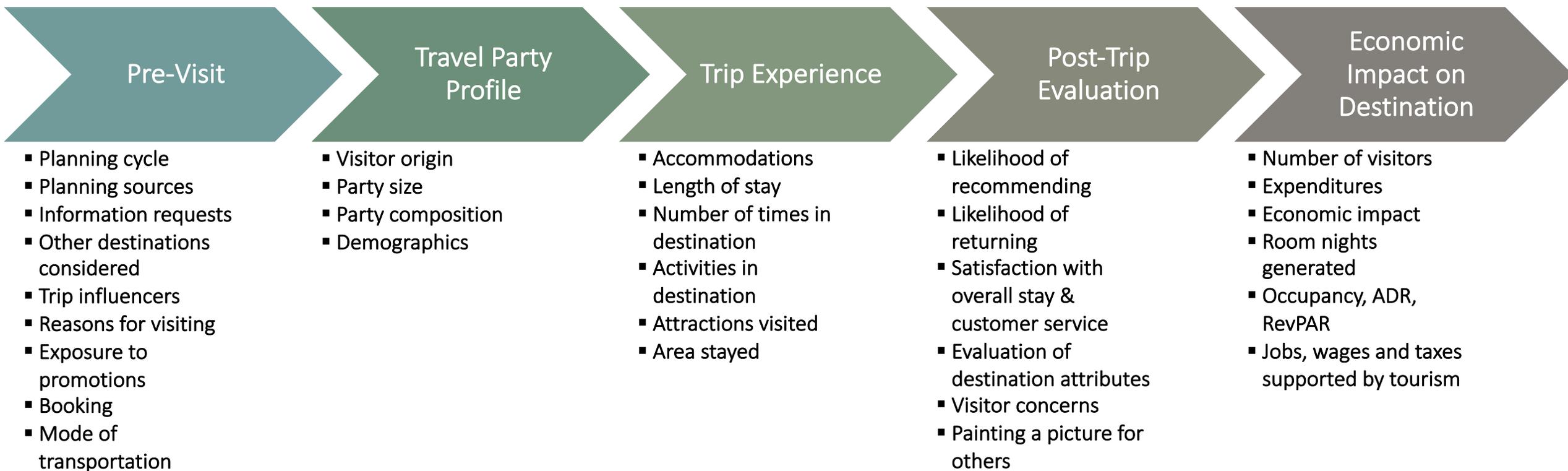Joseph St. Germain, Ph.D.
Rachael Anglin
Downs & St. Germain Research

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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

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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**
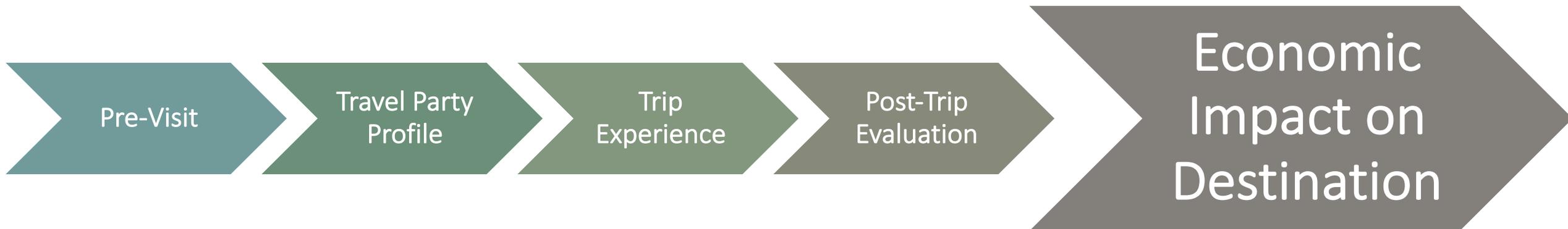
July – Sept 2020

Tourism Snapshot: July - Sept 2020[1]

Visitor & Lodging Statistics	July - September 2019	July - September 2020	% Change
Visitors	1,102,500	752,400[4]	-31.8%
Room Nights	975,200	846,900	-13.2%
Direct Expenditures[2]	$548,970,200	$500,650,800	-8.8%
Total Economic Impact[3]	$891,527,600	$813,056,900	-8.8%

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

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

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

[4]Larger decrease due to longer length of stay and a lower percentage of visitors staying with friends and relatives.

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Economic Impact on Destination
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Tourism Snapshot: Calendar Year-to-Date 2020[1]

Visitor & Lodging Statistics	CYTD 2019	CYTD 2020	% Change
Visitors	3,676,900	2,293,900	-37.6%
Room Nights	4,132,400	3,092,900	-25.2%
Direct Expenditures[2]	$2,528,485,600	$1,987,832,500	-21.4%
Total Economic Impact[3]	$4,106,260,300	$3,228,240,000	-21.4%

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

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

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

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Economic Impact on Destination
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July - Sept Lodging Statistics

39.7%
Occupancy

⬇ 12.9%

$127.24
ADR

⬆ 3.8%

$50.51
RevPAR

⬇ 9.7

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Economic Impact on Destination
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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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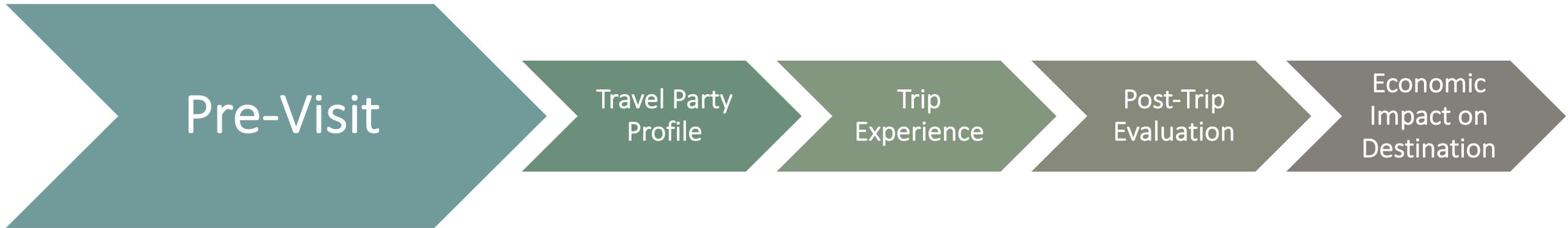
Trip Planning

→ Over **2 in 5** visitors planned their trip to The Beaches of Fort Myers & Sanibel at least 3 months in advance

→ **Over half** of visitors requested information from hotels, the VCB, etc., to plan their trip

→ **12%** of visitors considered choosing other destinations when planning their trips

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Trip Planning: Online Sources Used

→ **9 in 10** visitors used online sources to plan their trip to The Beaches of Fort Myers & Sanibel

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

31% Search engines

22% Airline websites/apps

22% Booking websites/apps

[1]Multiple responses permitted.

Pre-Visit
July – Sept 2020

Top Trip Influencers

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

96% Peaceful/relaxing

92% Safe destination

91% Clean, unspoiled environment

[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]:

45% Vacation

44% Beach

30% Relax & unwind

18% Visit friends & relatives

[1]Three responses permitted.

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Promotions

→ **36%** of visitors recalled promotions in the past 6 months for The Beaches of Fort Myers & Sanibel

→ Top sources of recall include[1]:

37% Social media

36% Internet

[1]Multiple responses permitted.

Booking

→Visitors used the following to book their trips:

37% Directly with hotel

21% Online travel agency
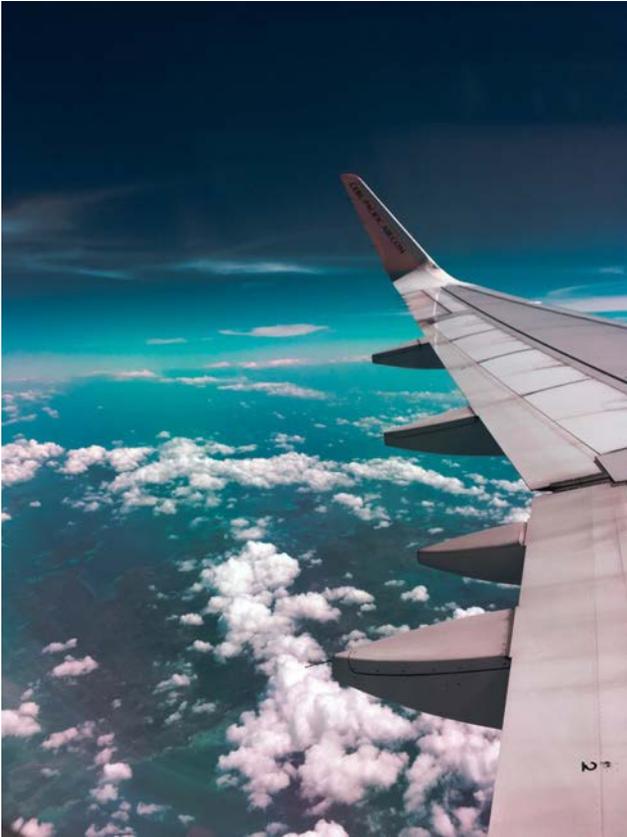

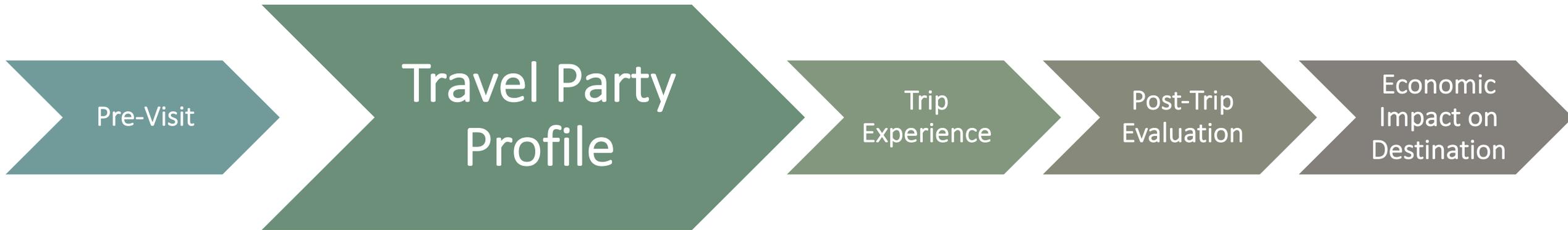**15% Vacation rental company**

13% Airbnb

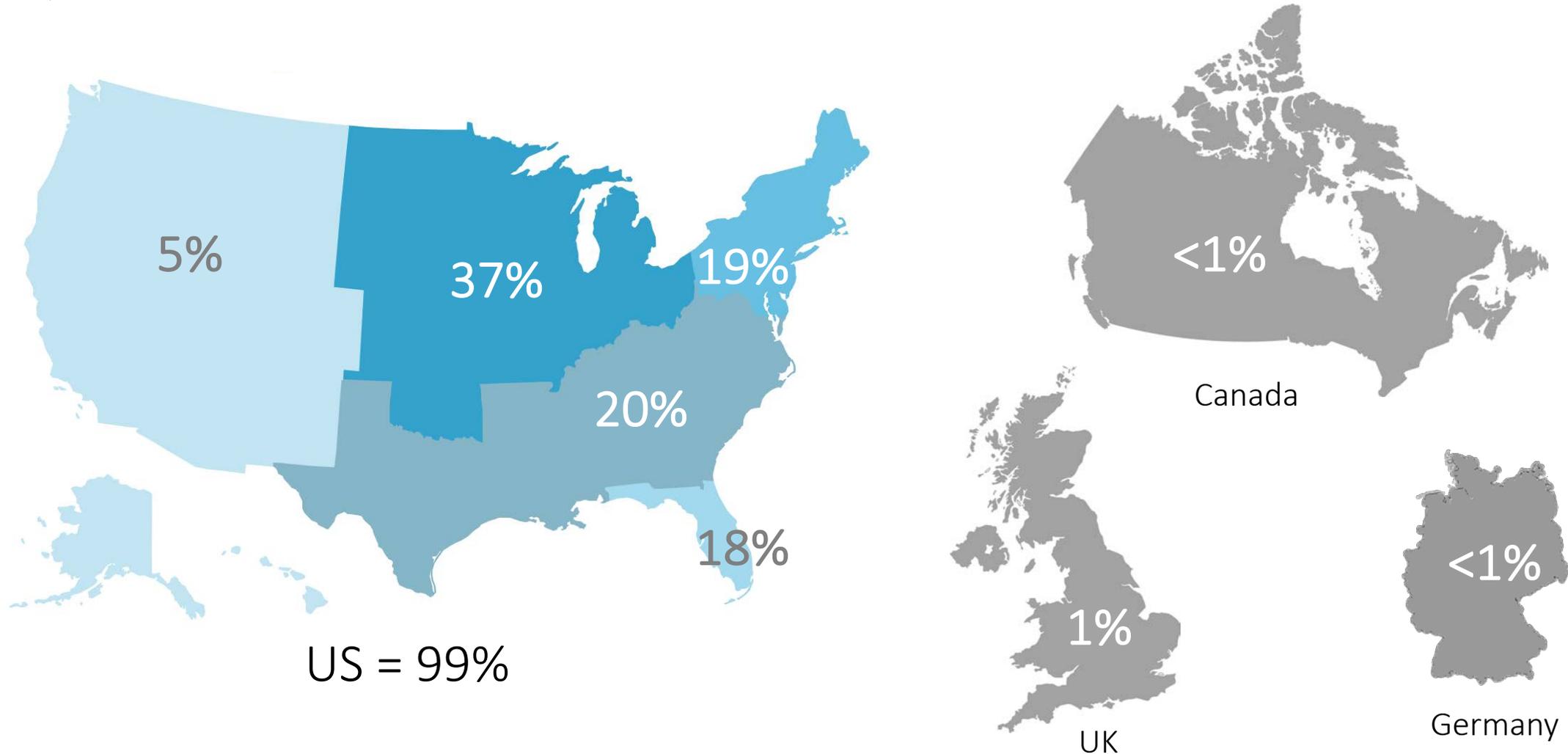**11% VRBO, HomeAway**

Transportation

→ **55%** of visitors flew to The Beaches of Fort Myers & Sanibel

→ **86%** of visitors who flew to The Beaches of Fort Myers & Sanibel flew to RSW

Visitor Journey: Travel Party Profile

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

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Travel Party Profile
July – Sept 2020

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Origin

5%

37%

19%

20%

18%

US = 99%

<1%

Canada

1%

UK

<1%

Germany

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Travel Party Profile
July – Sept 2020

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Top Origin Markets
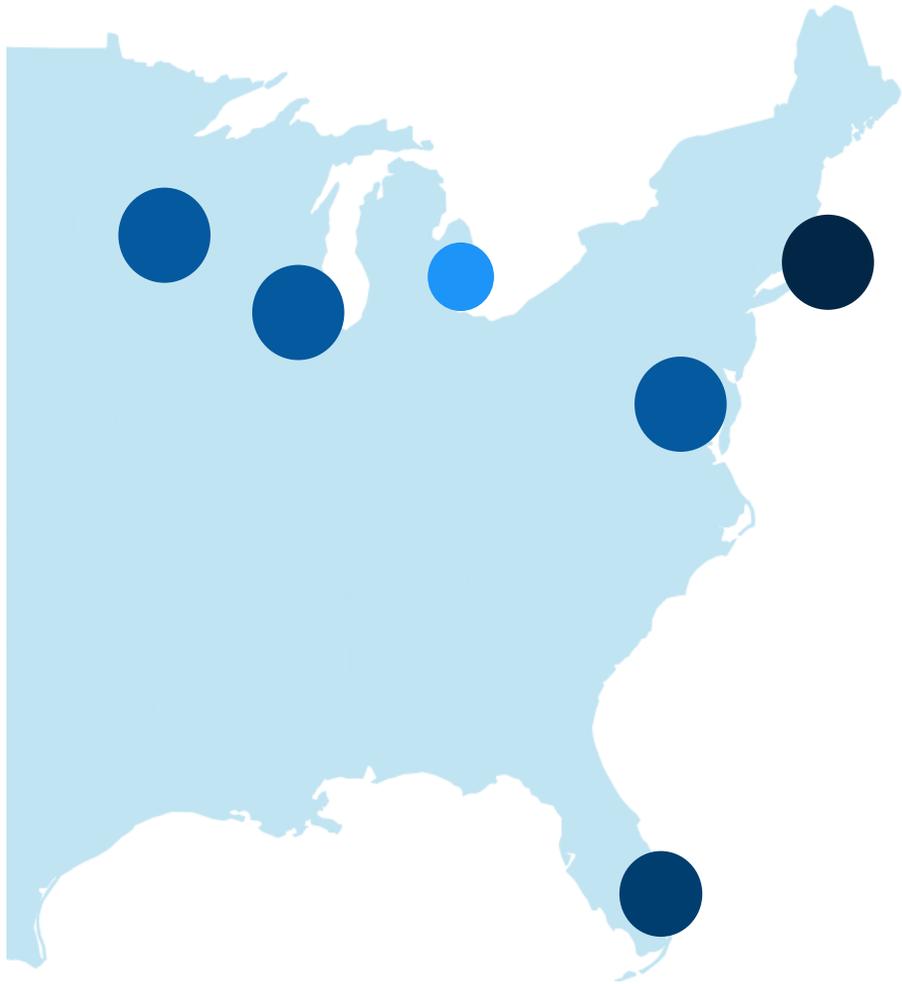
9%	New York
9%	Miami – Ft. Lauderdale
5%	Chicago
5%	Cincinnati
5%	Washington DC – Baltimore
4%	Detroit

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Travel Party Profile
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Travel Party Size and Composition

→Visitors traveled in a party composed of **3.8 people**[1]

→**38%** traveled with children under the age of 18

→**51%** of visitors traveled as a family, and another **30%** traveled as a couple

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

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Demographic Profile

July – September Visitors:

→ Average age of 47 years old

→ Median household income of $111,300

→ Married (75%)

→ College educated (57%)

→ Caucasian/white (76%)

→ Female (59%)

Travel Party Profile
July - Sept 2020

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Visitor Journey: Trip Experience

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

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Trip Experience
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Accommodations

39%
Hotel/Motel/Resort/B&B

33%
Condo/vacation rental

24%
Non-paid Accommodations

Length of Stay & Number of Times in Destination

→Visitors[1] spent **8.7 nights** in The Beaches of Fort Myers & Sanibel

→**27%** were first time visitors

→**25%** have visited more than 10 times

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

Visitor Activities

→Top visitor activities include[1]:
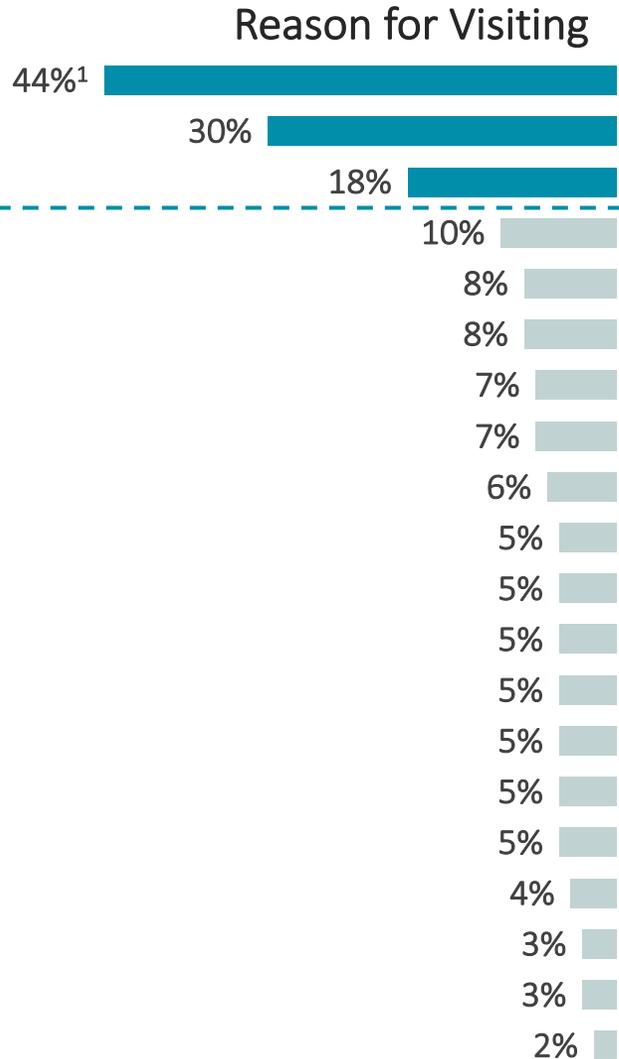

69% Beaches

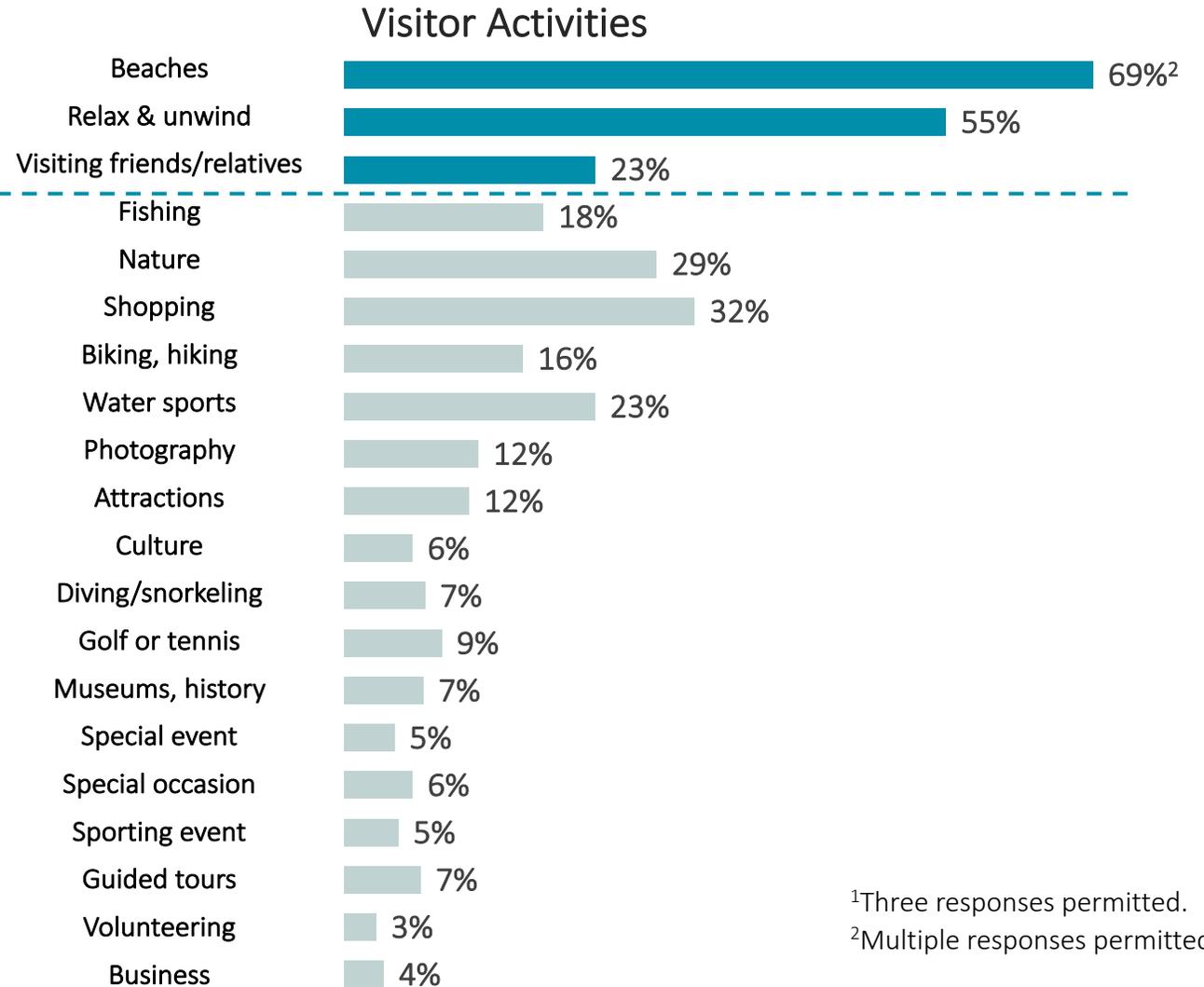
55% Relax & unwind

45% Dining

[1]Multiple responses permitted.

Reason for Visiting vs. Visitor Activities

Key Reasons for Visiting

Trip Enhancements

Reason for Visiting		Visitor Activities
44%[1]	Beaches	69%[2]
30%	Relax & unwind	55%
18%	Visiting friends/relatives	23%
10%	Fishing	18%
8%	Nature	29%
8%	Shopping	32%
7%	Biking, hiking	16%
7%	Water sports	23%
6%	Photography	12%
5%	Attractions	12%
5%	Culture	6%
5%	Diving/snorkeling	7%
5%	Golf or tennis	9%
5%	Museums, history	7%
5%	Special event	5%
5%	Special occasion	6%
4%	Sporting event	5%
3%	Guided tours	7%
3%	Volunteering	3%
2%	Business	4%

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

Travel Party Profile
July – Sept 2020

Top Attractions Visited[1]

69% Beaches

33% Fort Myers Beach Pier

33% Sanibel Lighthouse

19% Sanibel Outlets

14% Miromar Outlets

[1]Multiple responses permitted.

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Top Communities Stayed

24% Sanibel Island

24% Fort Myers Beach

15% Fort Myers

15% Cape Coral

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Visitor Journey: Post-Trip Evaluation

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

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Satisfaction

→ **94%** of visitors are likely to recommend The Beaches of Fort Myers & Sanibel

→ **94%** of visitors are likely to return

→ **66%** of visitors are likely to return next year

→ **43%** of visitors said paid accommodations exceeded their expectations

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Satisfaction

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

→ **93%** of visitors were satisfied or very satisfied with customer service on their visit

Top Attribute Ratings

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

98% Peaceful/relaxing

97% Warm weather

96% A safe destination

[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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Visitor Concerns

→ **Over 1 in 3** visitors were concerned about insects in The Beaches of Fort Myers & Sanibel

→ **2 in 5** July – September visitors had at least one concern about water conditions

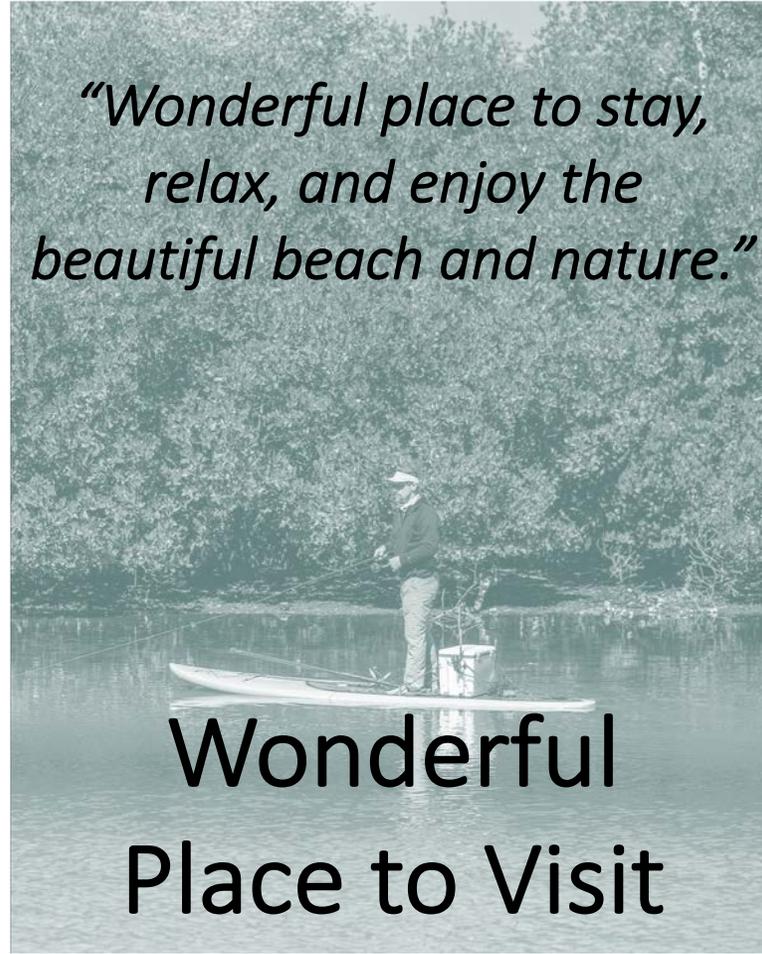→ **22%** of visitors had no concerns about the destination

Area Descriptions

"Beautiful Gulf beach with warm clear water. A more 'upscale' area of Florida that was quiet and relaxing. Lots of natural, unspoiled areas to enjoy!"
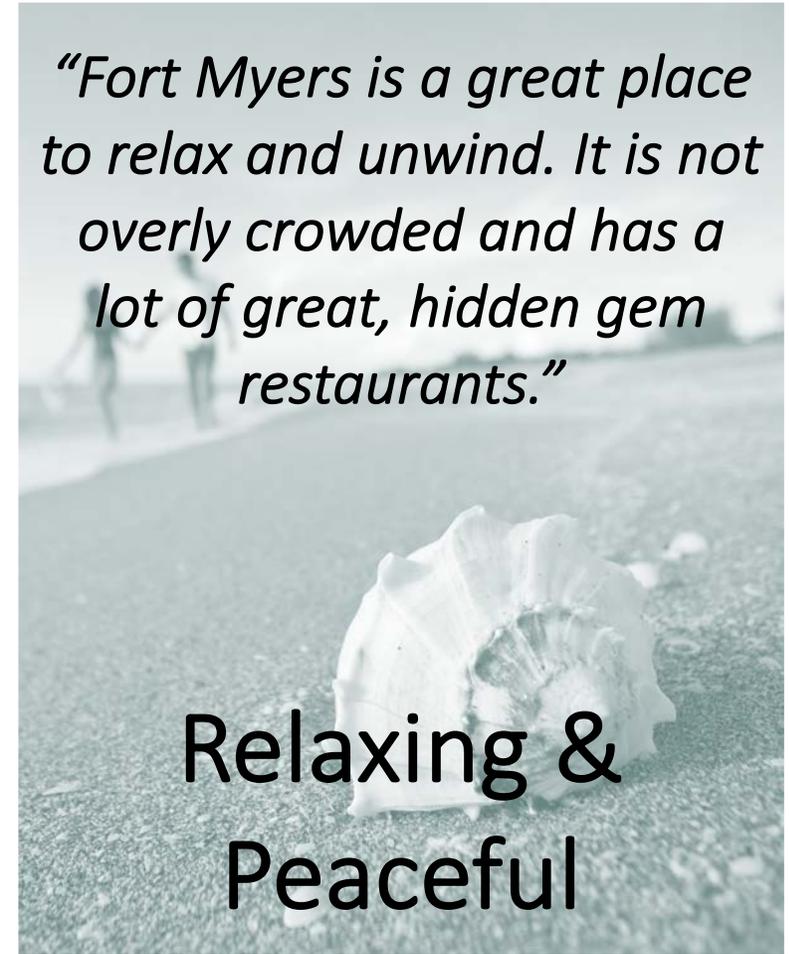
Beautiful Beaches

"Wonderful place to stay, relax, and enjoy the beautiful beach and nature."

Wonderful Place to Visit

"Fort Myers is a great place to relax and unwind. It is not overly crowded and has a lot of great, hidden gem restaurants."

Relaxing & Peaceful
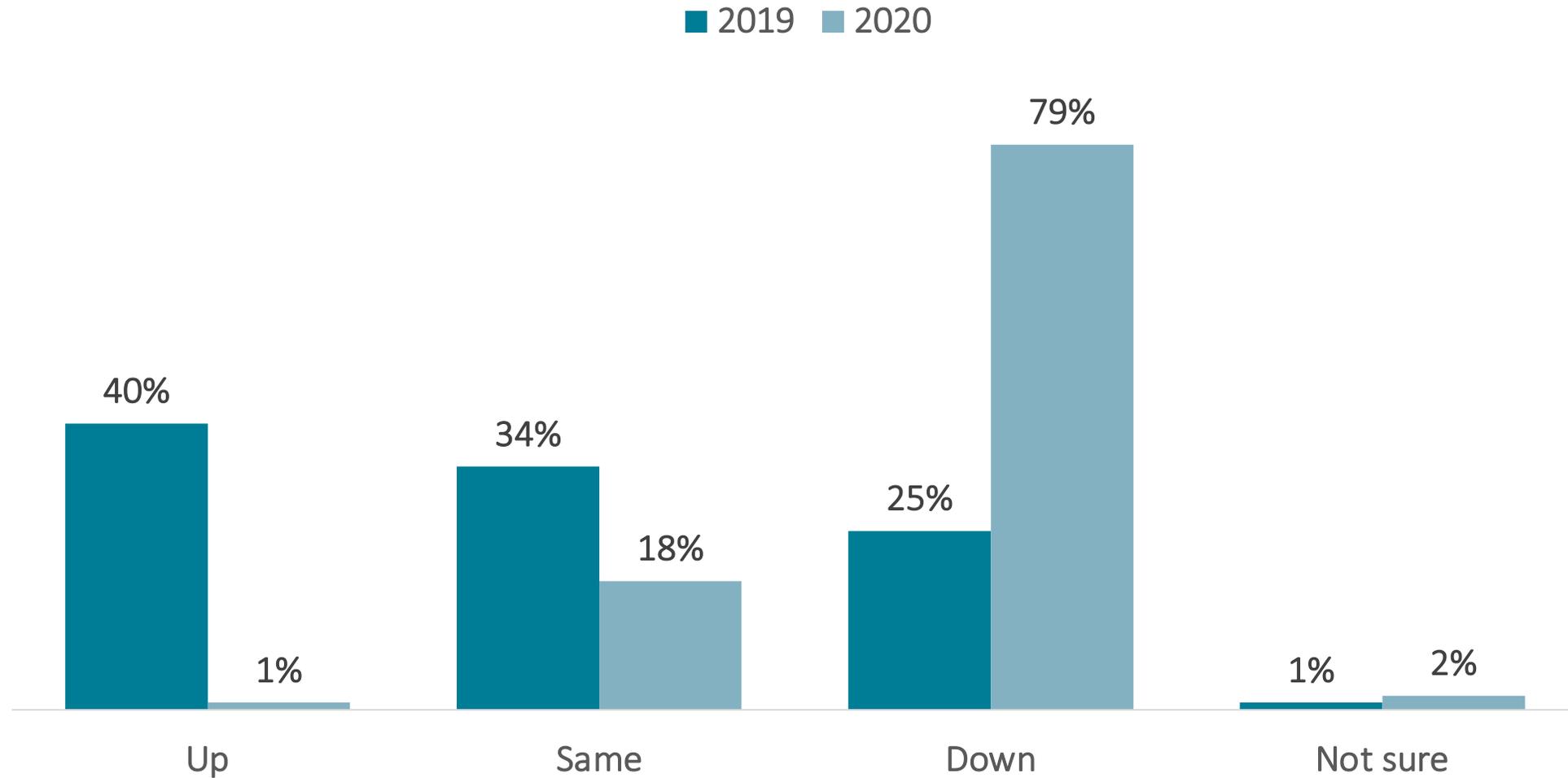
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Post-Trip Evaluation
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Occupancy Barometer: October – December Reservations

July – Sept 2020

Occupancy Barometer: January – March Reservations

July – Sept 2020

Detailed Findings

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Visitor Journey: Economic Impact on Destination

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

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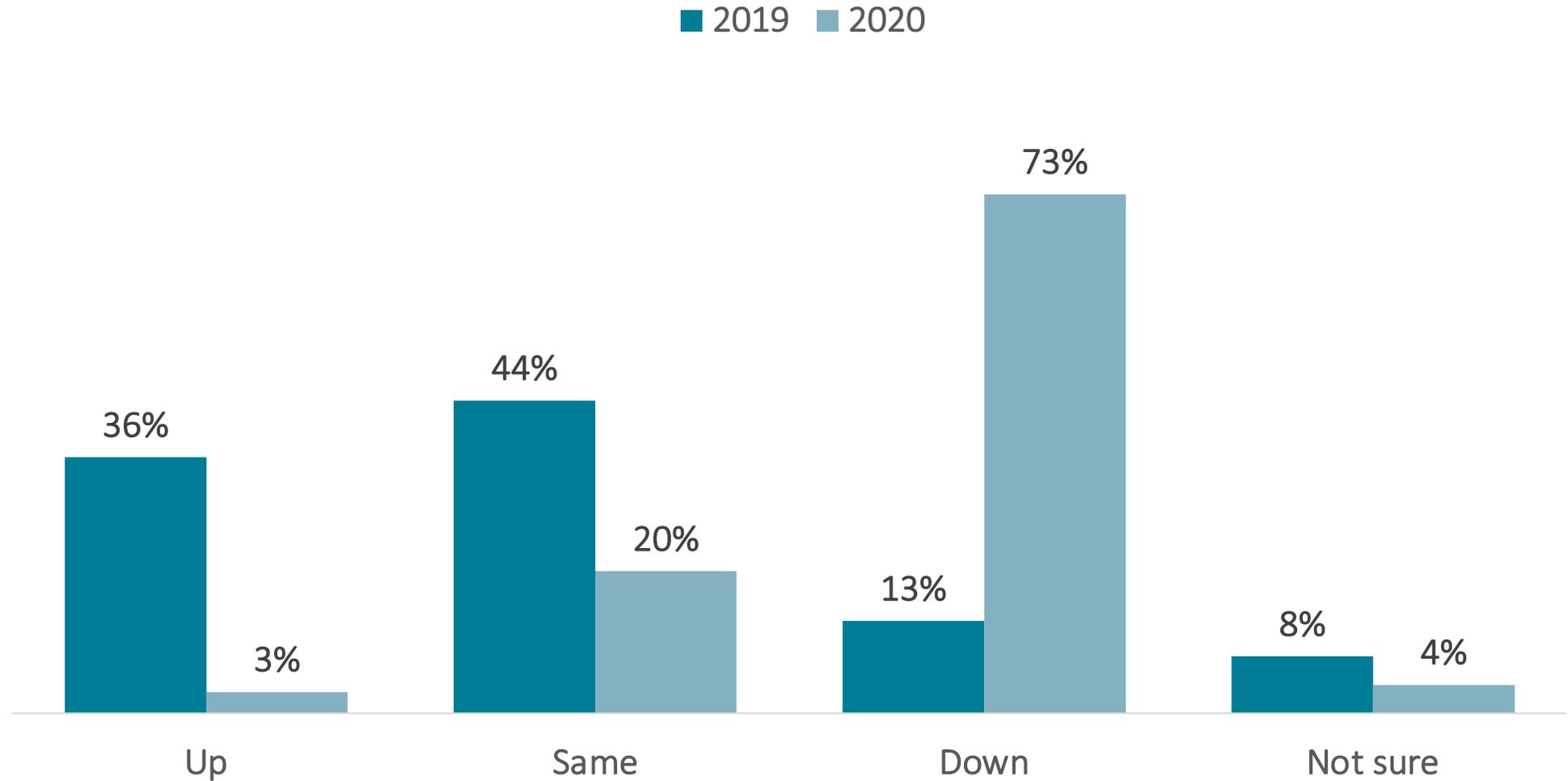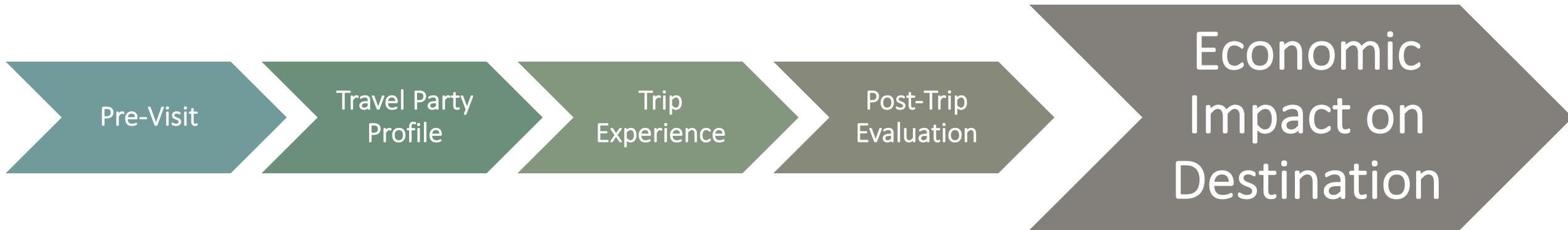
Number of Visitors

There were **752,400**[1] visitors to The Beaches of Fort Myers & Sanibel in July - Sept 2020 (-31.8% from 2019).

Paid Accommodations
- 541,800 (2020)
- 727,600 (2019)

Non-Paid Accommodations
- 195,600 (2020)
- 341,800 (2019)

Day Trippers
- 15,000 (2020)
- 33,100 (2019)

■ 2020 ■ 2019
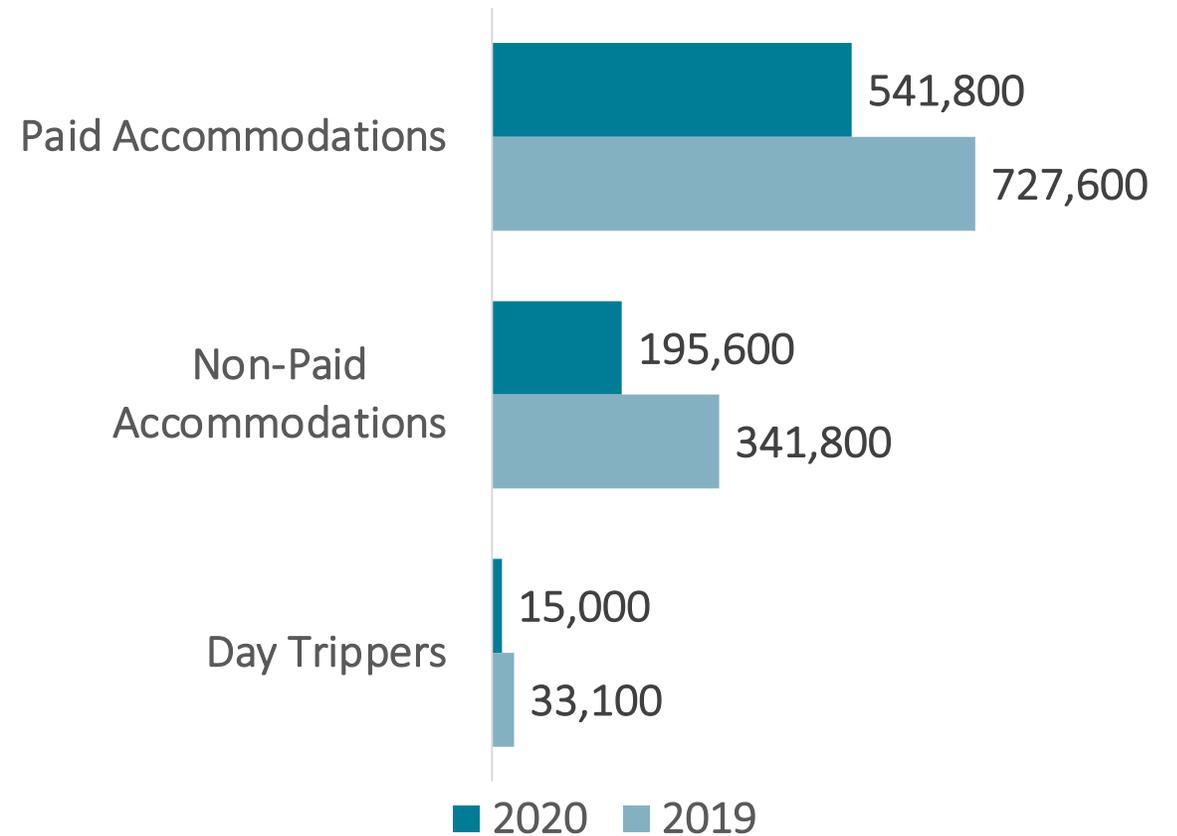
[1]Sources: Visitor Tracking Study & Occupancy Survey

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Economic Impact on Destination
July – Sept 2020

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Visitor Type

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

Paid Accommodations
- 72%
- 66%

Non-Paid Accommodations
- 26%
- 31%

Day Trippers
- 2%
- 3%

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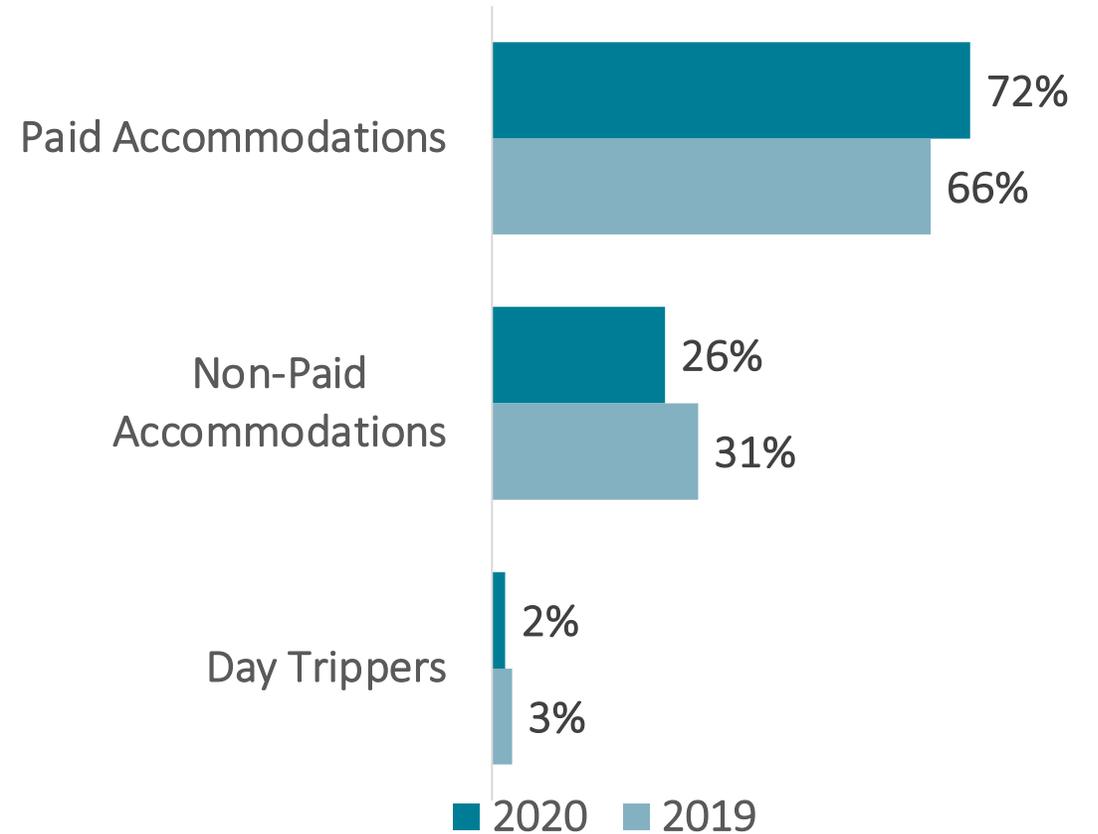
Visitor Expenditures by Visitor Type

July - Sept visitors spent **$500,650,800** in The Beaches of Fort Myers & Sanibel, resulting in a total economic impact of **$813,056,900**, down 8.8% from 2019.

Direct Spending

Paid Accommodations
- $388,891,600
- $374,872,900

Non-Paid Accommodations
- $110,596,400
- $171,972,500

Day Trippers
- $1,162,800
- $2,124,800

■ 2020 ■ 2019

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Economic Impact on Destination
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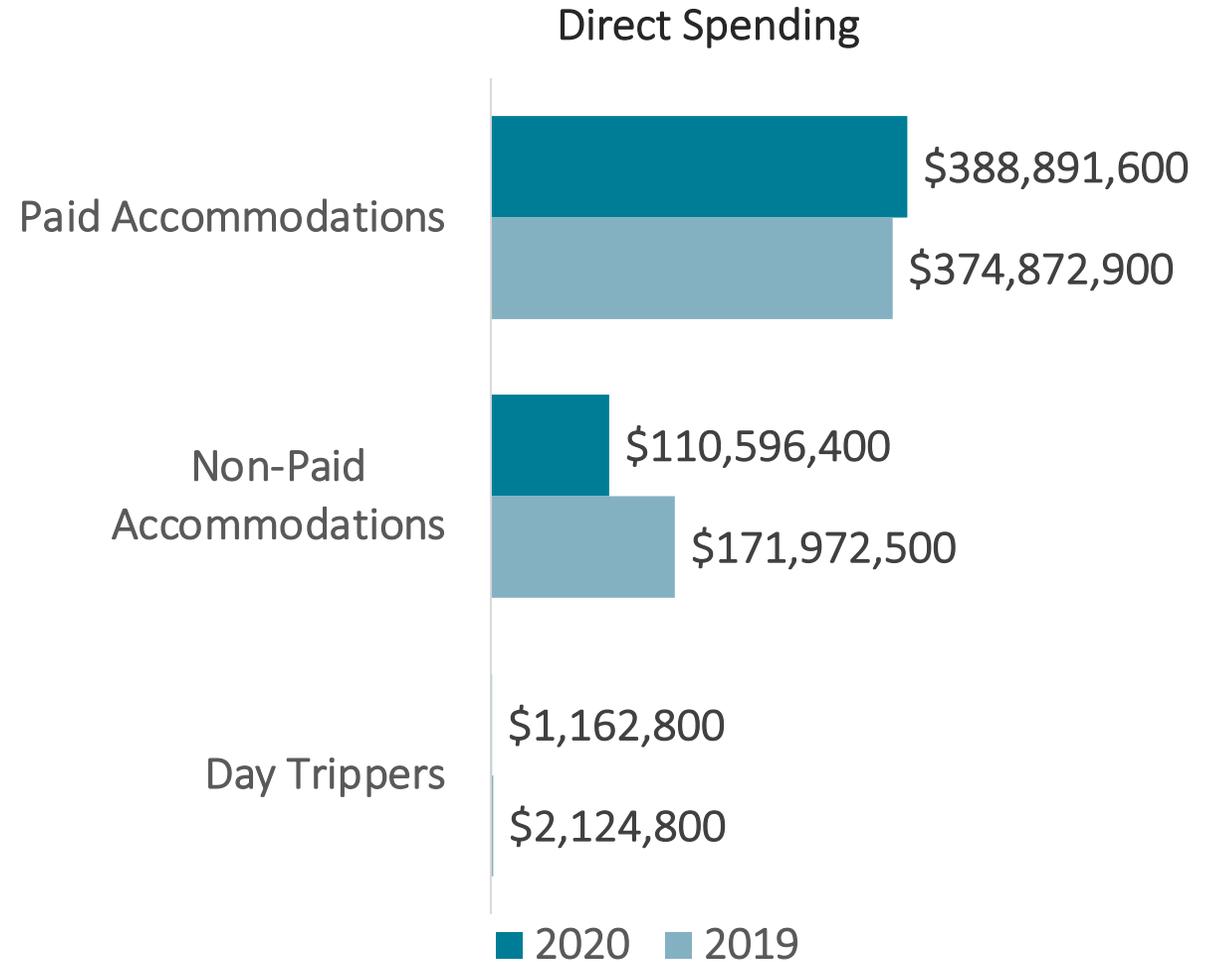
Visitor Expenditures by Spending Category

July - Sept visitors spent **$500,650,800** in The Beaches of Fort Myers & Sanibel, resulting in a total economic impact of **$813,056,900**, down 8.8% from 2019.

Category	2020	2019
Accommodations	$119,646,500	$140,565,400
Restaurants	$103,861,800	$139,279,600
Groceries	$61,340,800	$63,948,000
Shopping	$71,147,500	$75,806,300
Transportation	$57,339,000	$55,201,500
Admissions to attractions/events	$31,905,300	$28,503,300
Other entertainment	$27,318,000	$15,397,900
Other	$28,091,900	$30,268,200

■ 2020 ■ 2019

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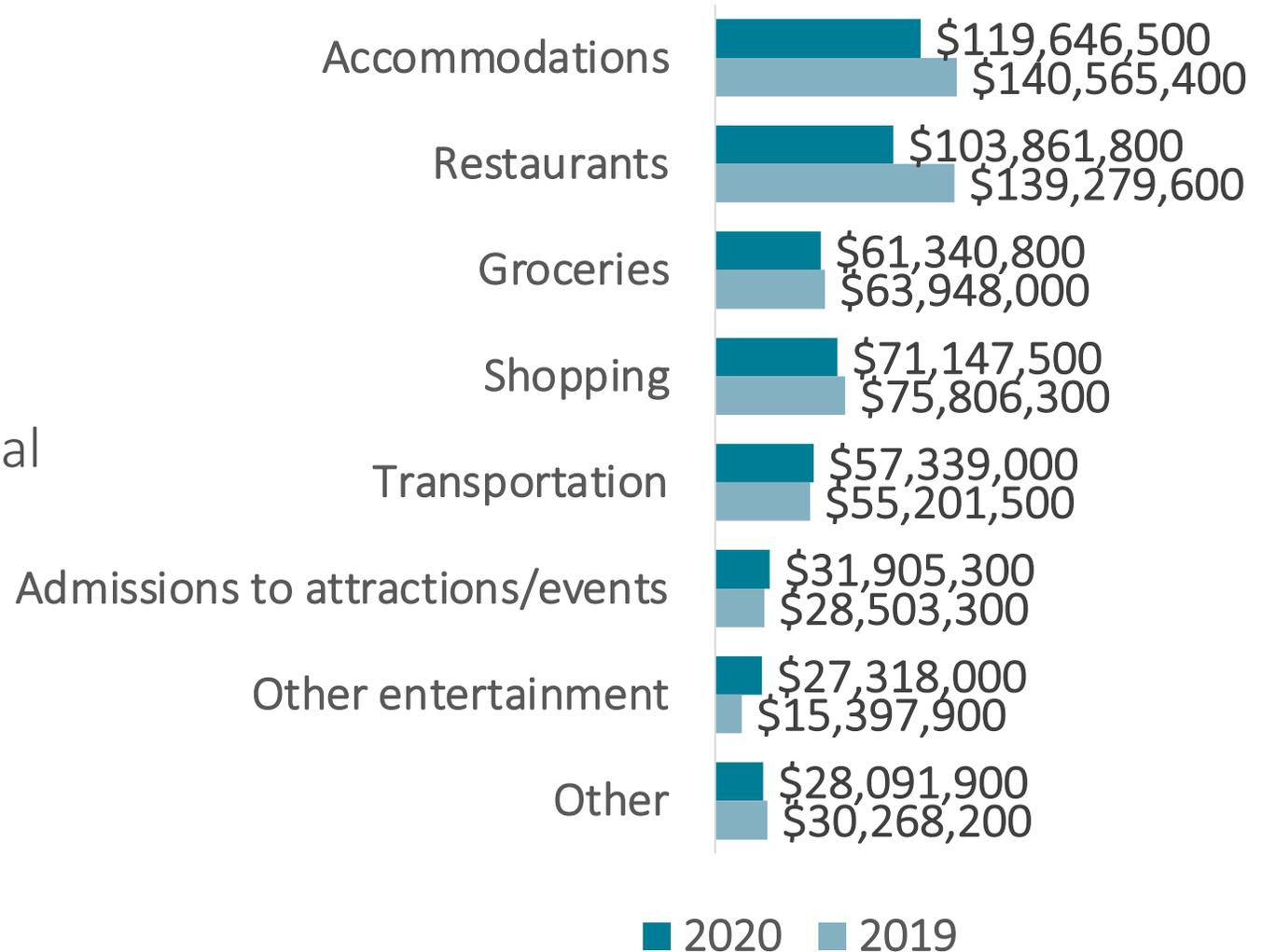
Number of Visitors by Lodging Type

541,800 visitors stayed in paid accommodations during their visit to The Beaches of Fort Myers & Sanibel (-25.5% from 2019).

Hotel/Motel/Resort/B&B
- 336,200
- 557,400

Condo/Cottage/Vacation Home
- 122,500
- 117,100

RV Park/Campground
- 83,100
- 53,100

■ 2020 ■ 2019
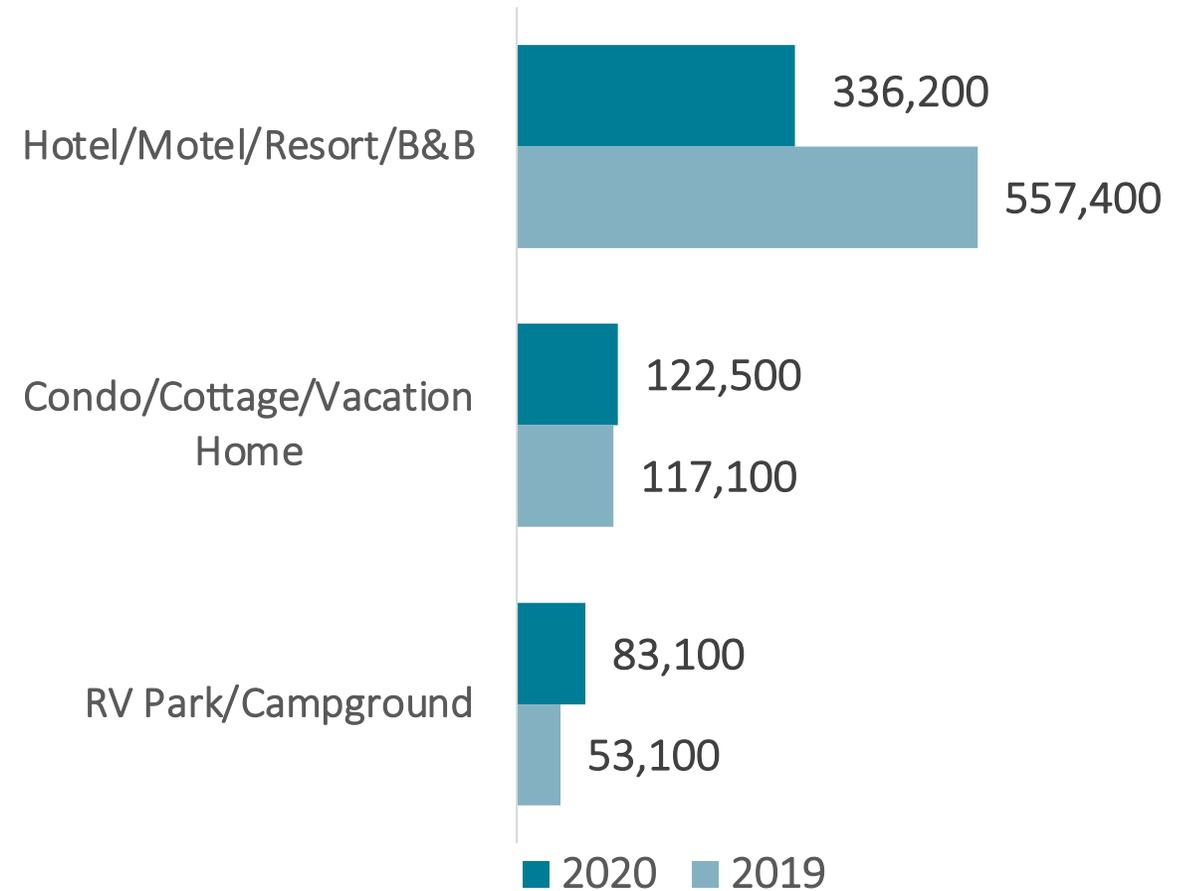
Visitor Expenditures by Lodging Type

July - Sept visitors staying in paid accommodations spent $388,891,600 in The Beaches of Fort Myers & Sanibel (+3.7% from 2019).

Hotel/Motel/Resort/B&B
- $220,549,700
- $233,941,800

Condo/Cottage/Vacation Home
- $100,838,100
- $93,971,300

RV Park/Campground
- $67,503,800
- $46,959,800

■ 2020 ■ 2019

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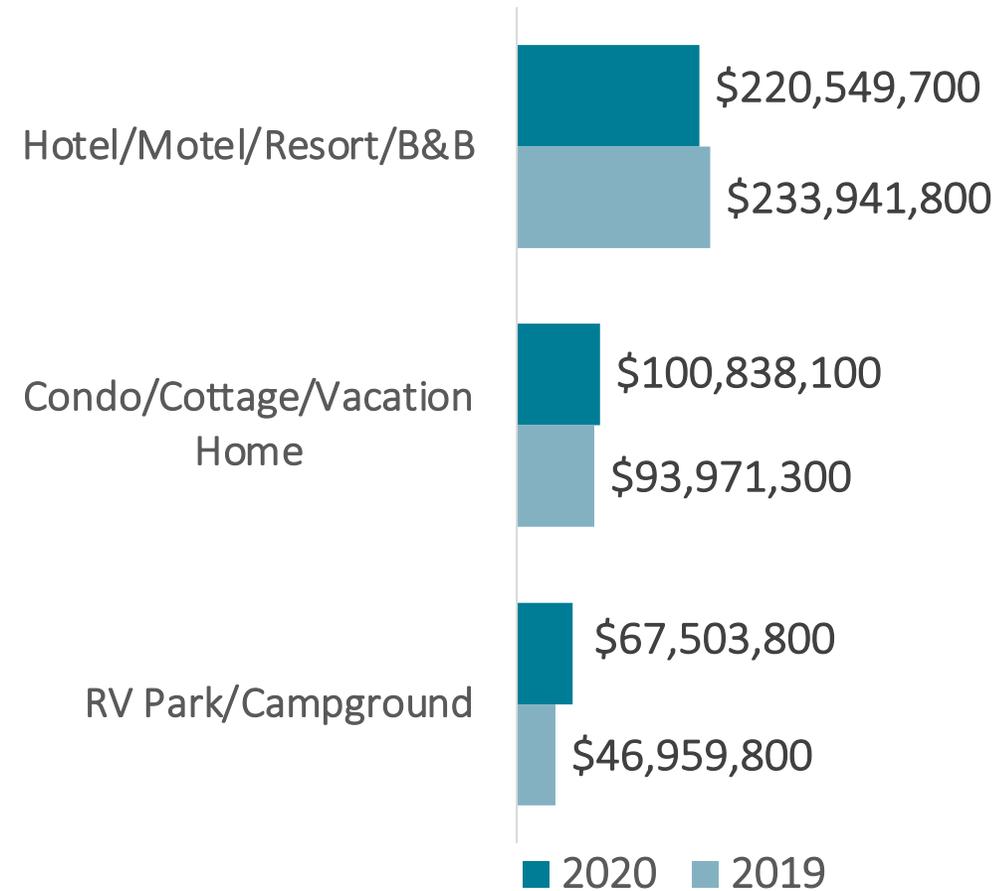
Room Nights Generated

July - Sept visitors spent **846,900**[1] nights in The Beaches of Fort Myers & Sanibel hotels, resorts, condos, rental houses, etc. (-13.2% from 2019).

975,200
846,900

2019   2020

[1]Source: Occupancy Survey

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Economic Impact on Destination
July – Sept 2020

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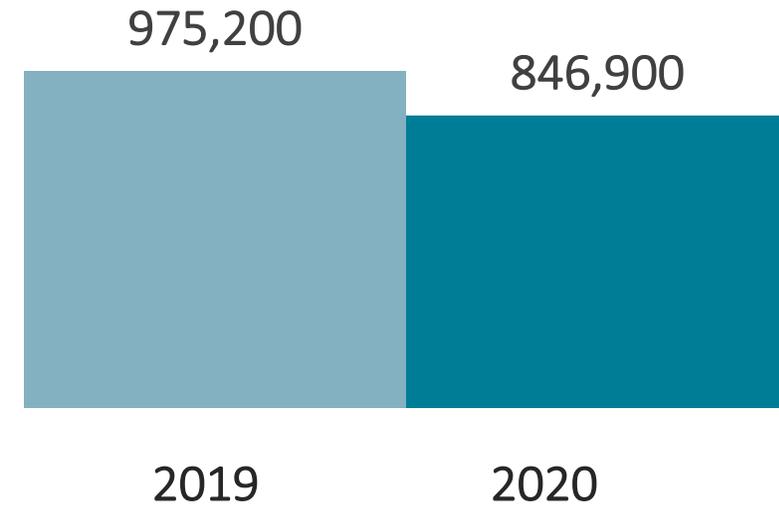
Room Nights Generated

Motels, hotels, etc. accounted for more than **half** the nights in The Beaches of Fort Myers & Sanibel, while RV Parks & campgrounds accounted for **1 in 4** nights visitors spent in the area.

Hotel/Motel/Resort/B&B
- 474,600
- 598,100

Condo/Cottage/Vacation Home
- 174,000
- 187,800

RV Park/Campground
- 198,300
- 189,300

■ 2020 ■ 2019

[1]Source: Occupancy Survey

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Economic Impact on Destination
July – Sept 2020

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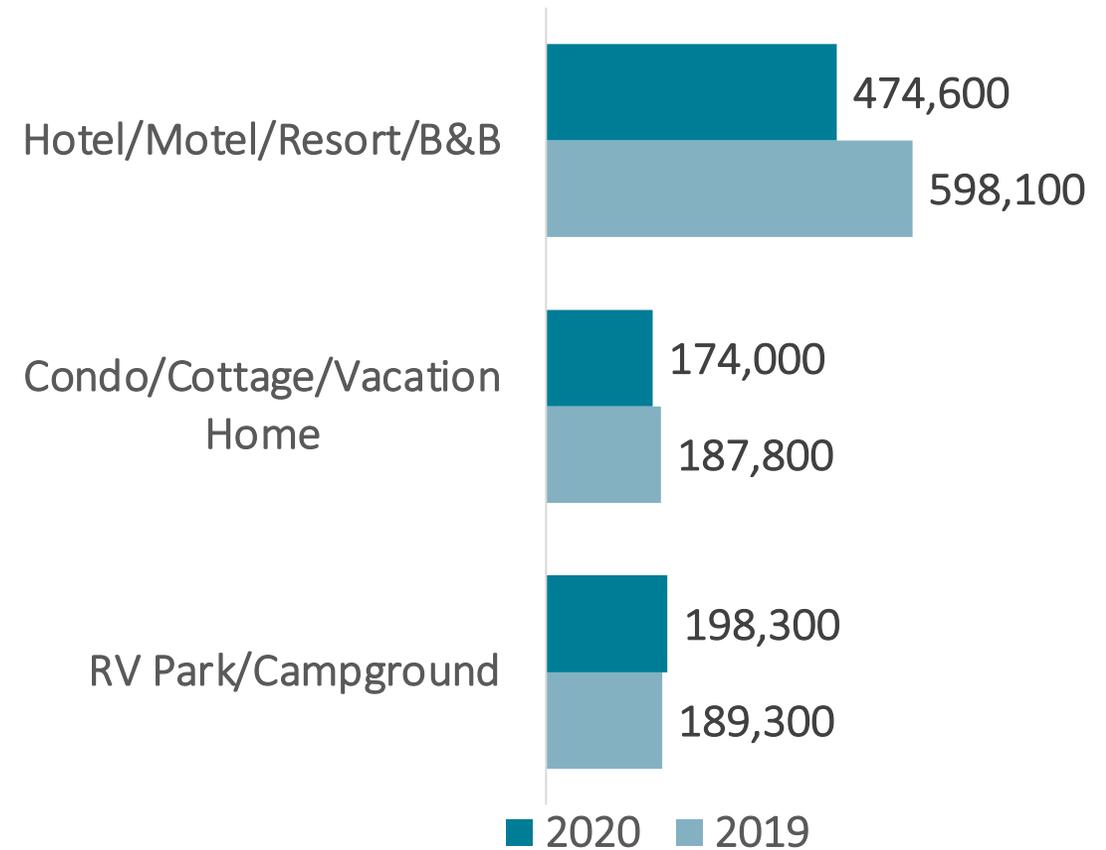
Available Units

There were **23,182**[1] available units in July - Sept, 2020 vs. 23,224 in 2019 (-0.2%). Over half of the units were hotels, motels, etc.

Hotel/Motel/Resort/B&B
- 2020: 11,238
- 2019: 11,326

Condo/Cottage/Vacation Home
- 2020: 6,102
- 2019: 6,440

RV Park/Campground
- 2020: 5,842
- 2019: 5,458

■ 2020 ■ 2019

[1]Source: Occupancy Survey

Economic Impact on Destination
July – Sept 2020
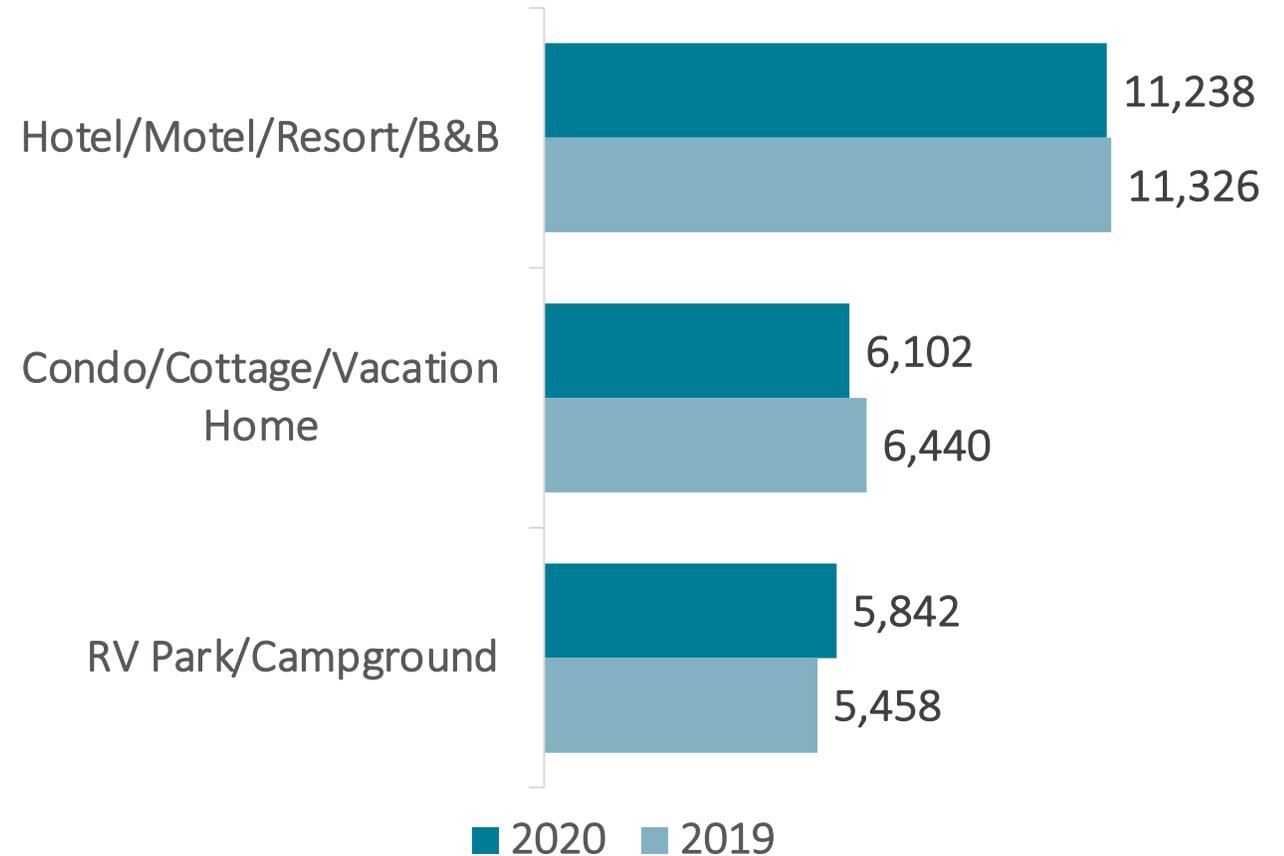
Occupancy, ADR and RevPAR

| Occupancy (-12.9%)[1] | ADR (+3.8%)[1] | RevPAR (-9.7%)[1] |

Occupancy (-12.9%)[1]
- 45.6% — 2019
- 39.7% — 2020

ADR (+3.8%)[1]
- $122.54 — 2019
- $127.24 — 2020

RevPAR (-9.7%)[1]
- $55.93 — 2019
- $50.51 — 2020

[1]Source: Occupancy Survey

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Economic Impact on Destination
July – Sept 2020

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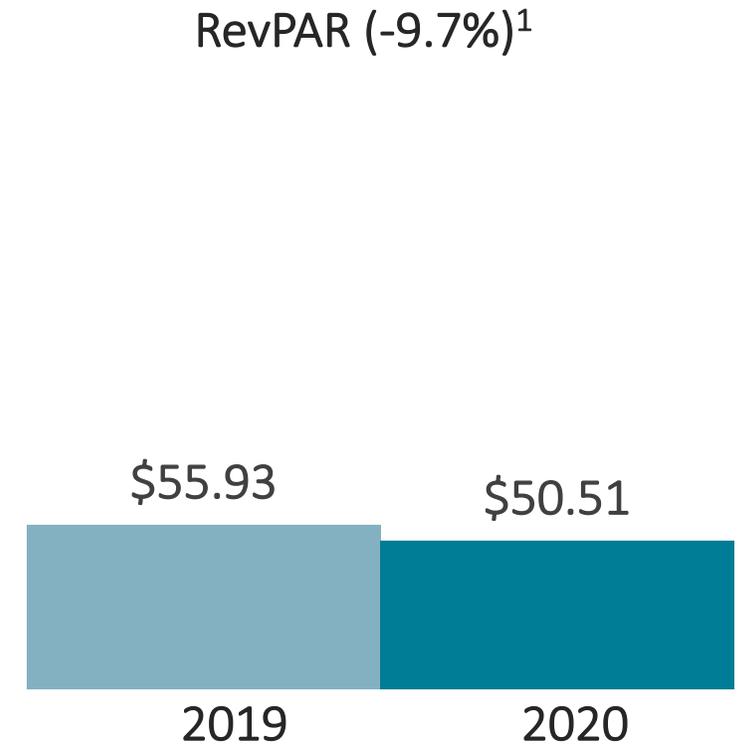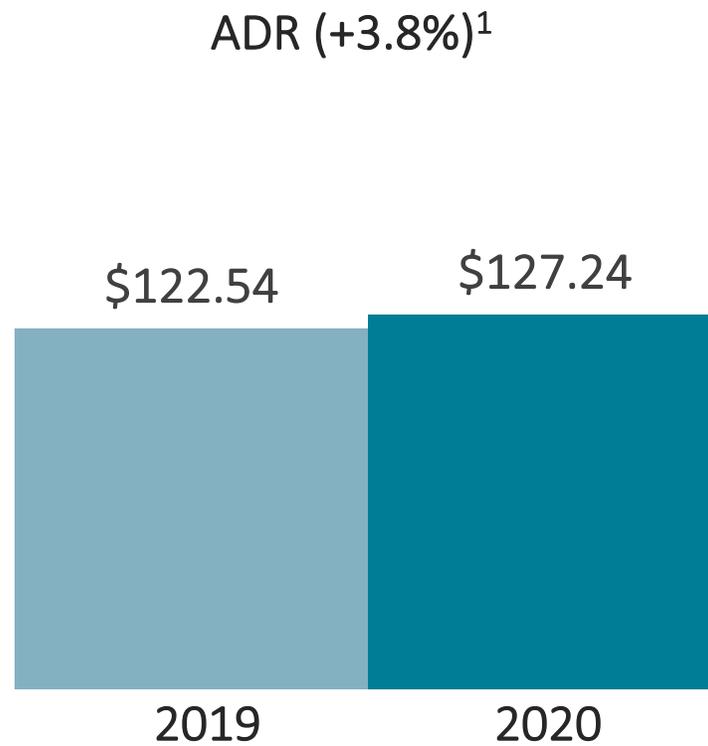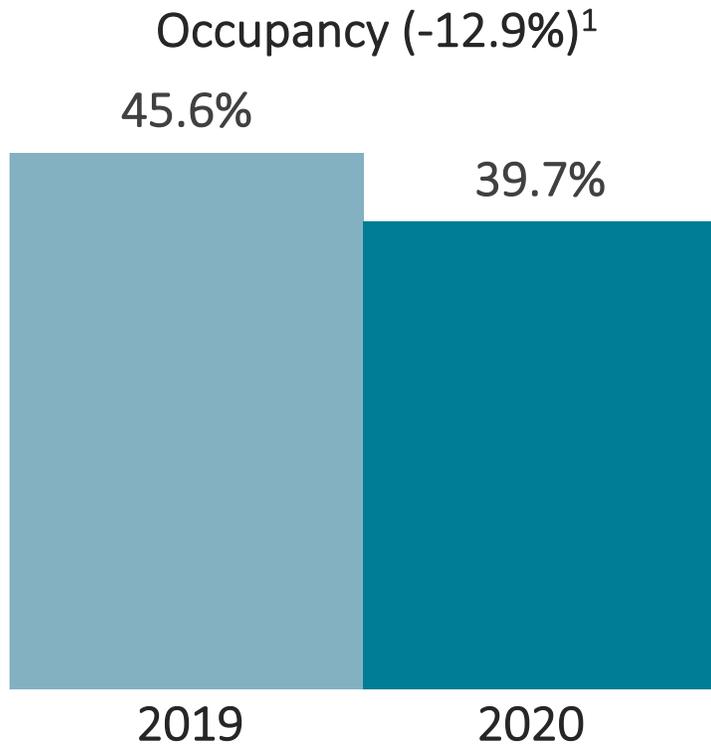
Occupancy

Average occupancy in July - Sept was **39.7%**[1] (45.6% in 2019).

Hotel/Motel/Resort/B&B
- 2020: 45.9%
- 2019: 57.4%

Condo/Cottage/Vacation Home
- 2020: 31.0%
- 2019: 31.7%

RV Park/Campground
- 2020: 36.9%
- 2019: 37.7%

■ 2020 ■ 2019

[1]Source: Occupancy Survey

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Economic Impact on Destination
July – Sept 2020

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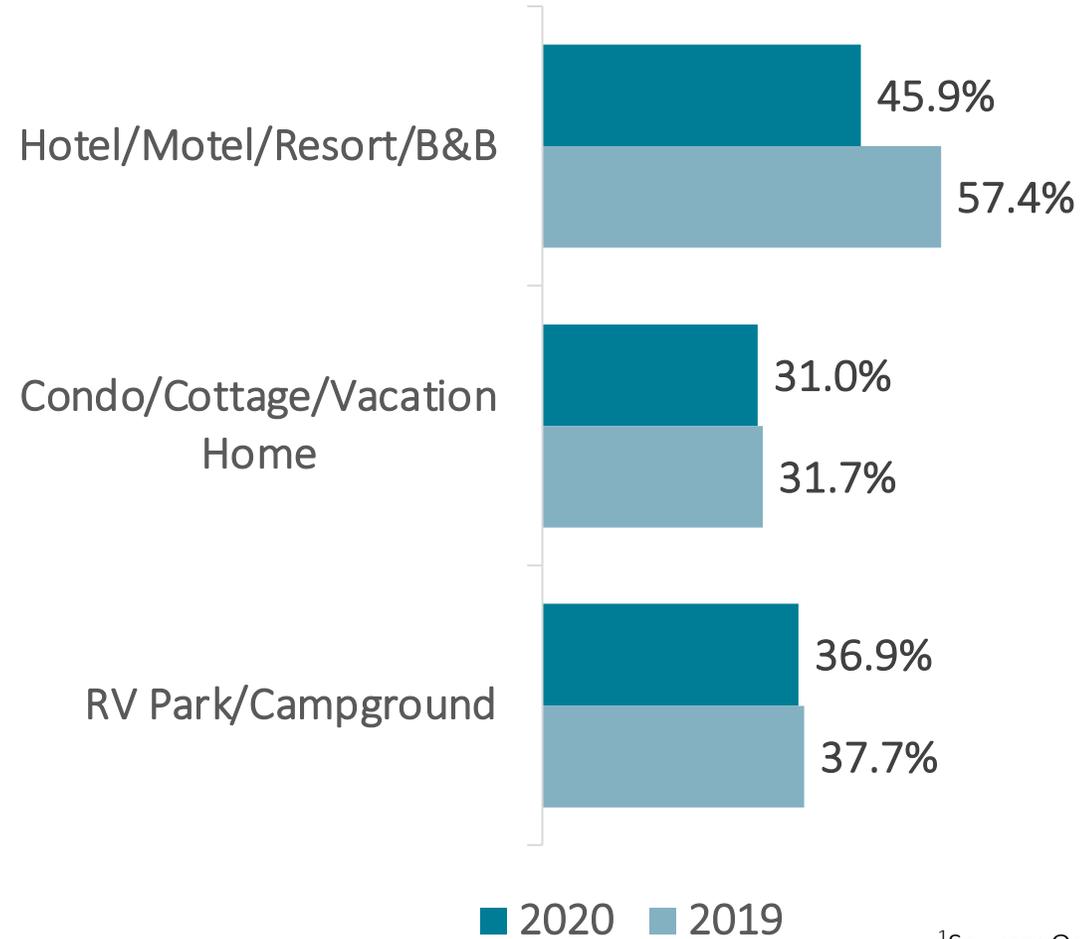
ADR

ADR in July - Sept was **$127.24**[1] ($122.54 in 2019).

Hotel/Motel/Resort/B&B
- 2020: $131.45
- 2019: $148.80

Condo/Cottage/Vacation Home
- 2020: $183.84
- 2019: $195.91

RV Park/Campground
- 2020: $60.01
- 2019: $53.30

■ 2020 ■ 2019

[1]Source: Occupancy Survey

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Economic Impact on Destination
July – Sept 2020

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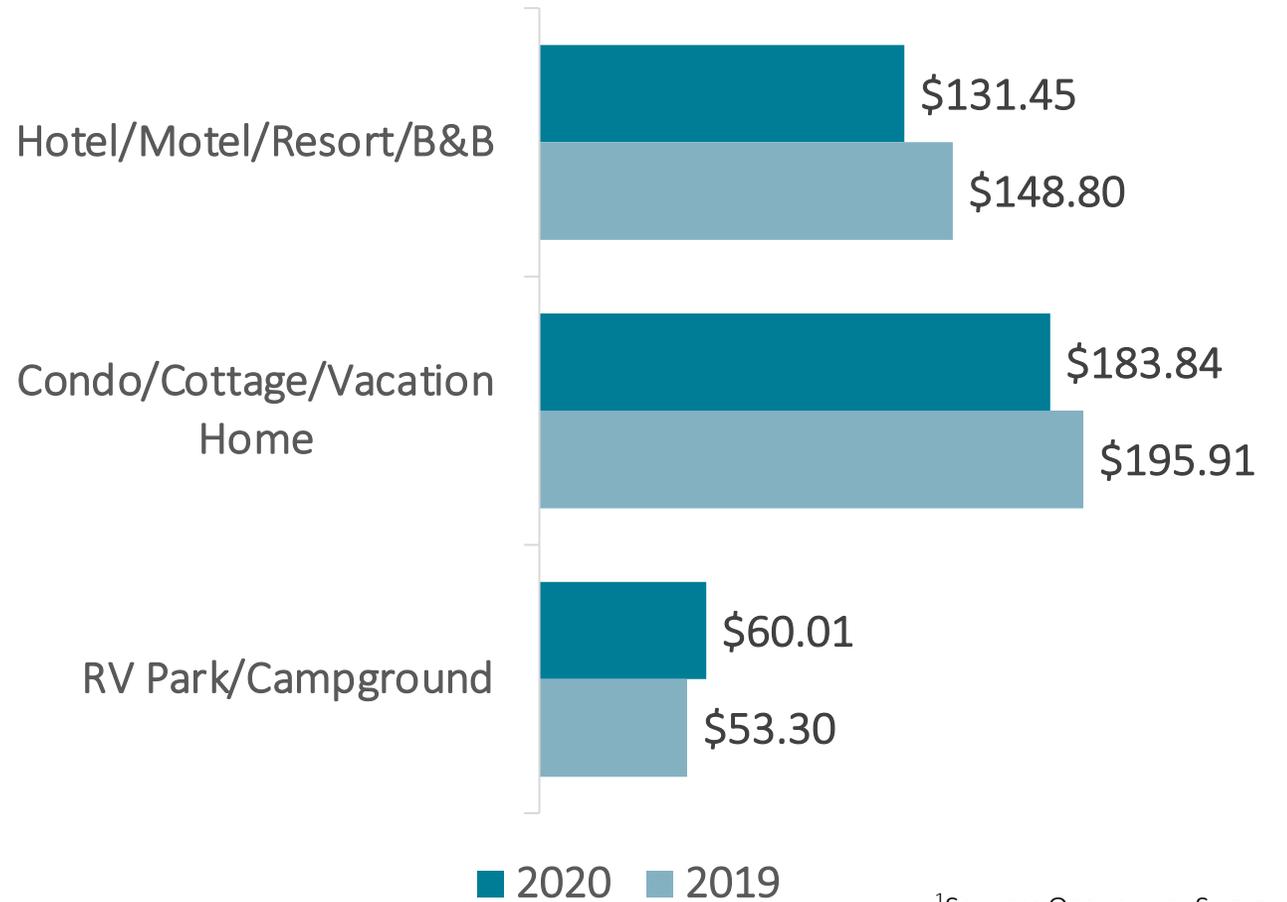
RevPAR

Average RevPAR in July - Sept was $50.51[1] ($55.93 in 2019).

RevPAR for RV Parks & campgrounds was up 22.3%, while RevPAR for hotels and condos were down 13.4% and 14.3%, respectively.

Hotel/Motel/Resort/B&B
- $60.34
- $69.69

Condo/Cottage/Vacation Home
- $56.99
- $66.53

RV Park/Campground
- $22.14
- $18.11

■ 2020   ■ 2019

[1]Source: Occupancy Survey

THE BEACHES OF
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Economic Impact on Destination
July – Sept 2020

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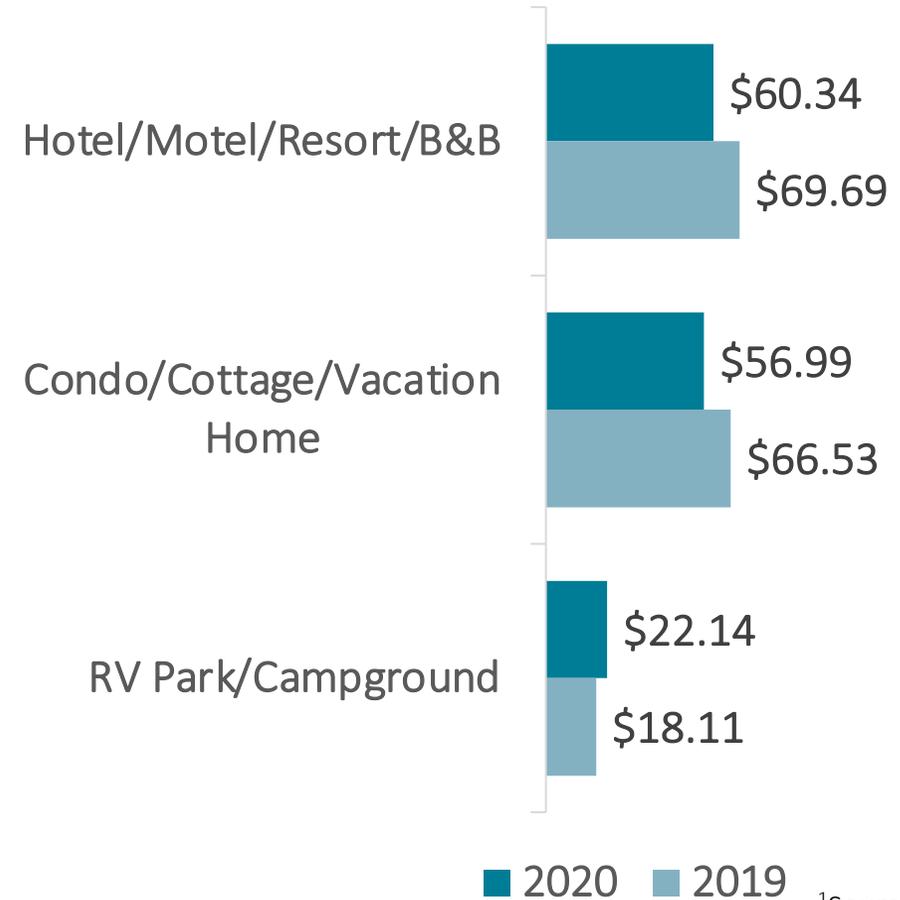
Travel Party Size

For visitors in paid accommodations, average travel party size in July - Sept was **3.0 people**[1] (2.6 people in 2019).

Average travel party size for visitors staying in RV Parks & campgrounds Increased significantly.

Hotel/Motel/Resort/B&B
- 2020: 2.3
- 2019: 2.2

Condo/Cottage/Vacation Home
- 2020: 4.5
- 2019: 4.1

RV Park/Campground
- 2020: 3.4
- 2019: 2.3

■ 2020   ■ 2019

[1]Source: Occupancy Survey

THE BEACHES OF FORT MYERS AND SANIBEL

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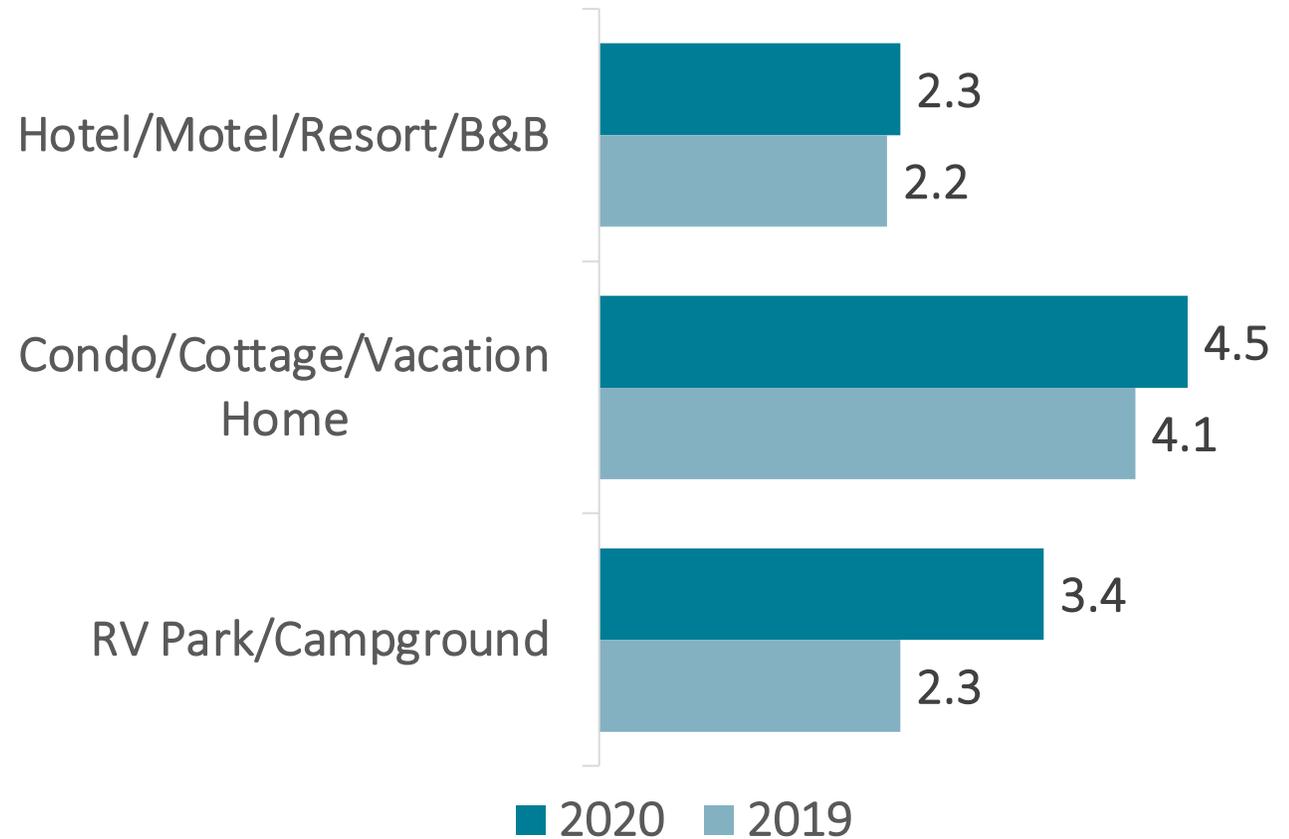
Length of Stay

For visitors in paid accommodations, average length of stay in July - Sept was **4.6 nights**[1] (3.5 nights in 2019).

Hotel/Motel/Resort/B&B
3.2
2.4

Condo/Cottage/Vacation Home
6.3
6.7

RV Park/Campground
8.0
8.3

■ 2020 ■ 2019

[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
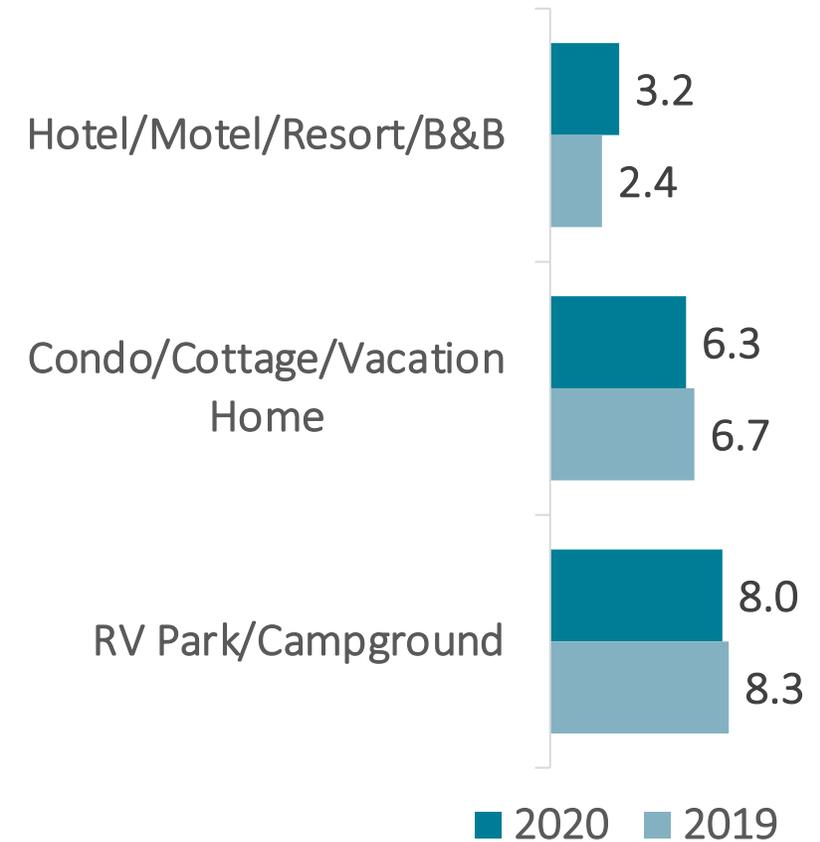
Pre-Visit
July – Sept 2020
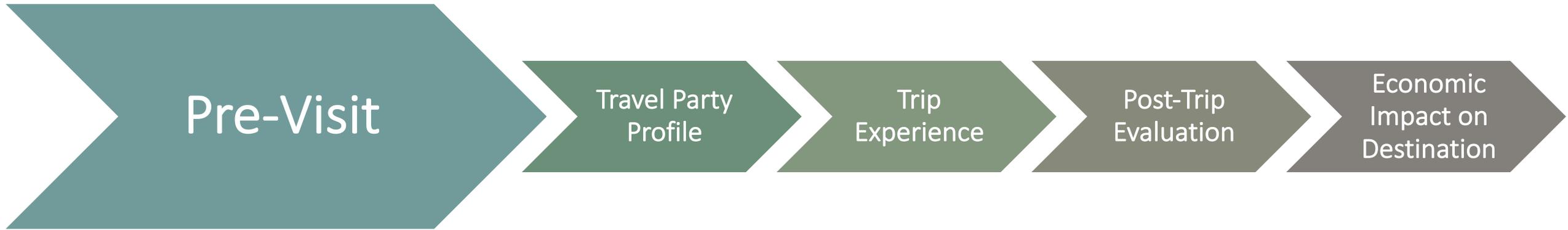
Trip Planning Cycle

Over **2 in 5** visitors planned their trip at least 3 months in advance, while nearly **1 in 4** planned their trip less than a month in advance.

Planning window	Percentage
1 week or less	6%
2-4 weeks	17%
1-2 months	35%
3-6 months	26%
6 months or more	16%

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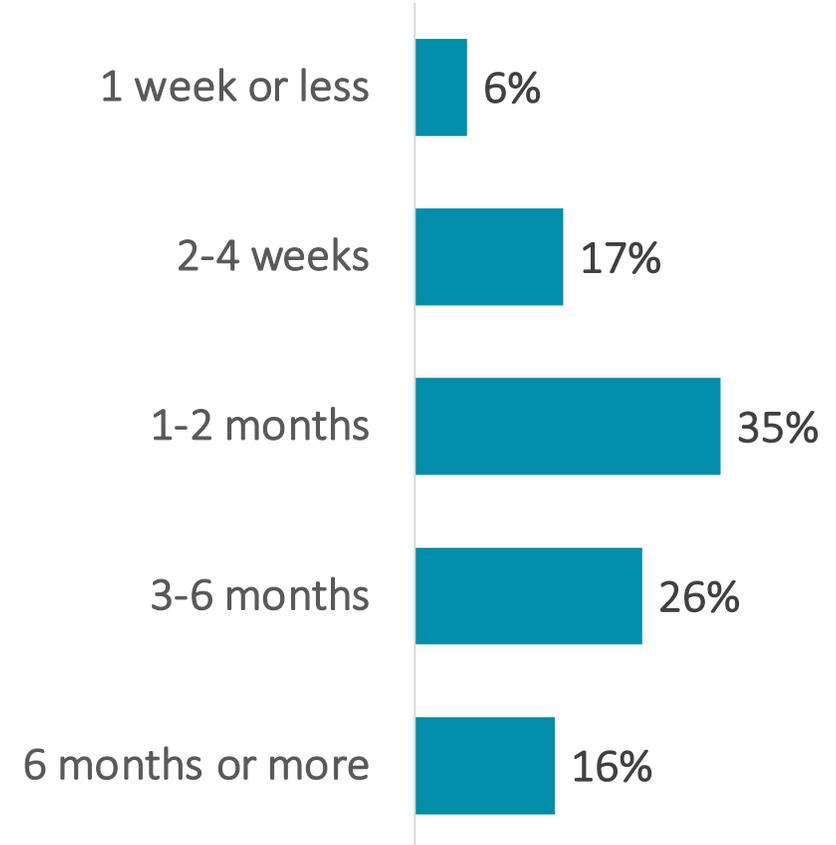
Trip Planning: Online Sources Used

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

Search engines were used most frequently, followed by airline and booking sites.

Use of The Beaches of Fort Myers & Sanibel social media and website nearly doubled year-over-year.

Source	%
Search engines	31%[1]
Airline websites	22%
Booking websites	22%
Airbnb, VRBO, Homeaway, or similar website	21%
Trip Advisor	20%
Hotel websites	17%
Vacation rental websites	16%
Beaches of Fort Myers & Sanibel Social Media	13%
www.FortMyers-Sanibel.com	12%
Facebook	11%
Visit Florida	10%
Travel reviews, blogs, stories, etc.	10%
Instagram	8%
Youtube, Hulu, Pandora	6%
Other	3%
None/Don't visit websites	10%

[1]Multiple responses permitted.

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Trip Planning: Information Requests

Over half of visitors made information requests to plan their trip to The Beaches of Fort Myers & Sanibel – more so than last year.

Significantly more information requests were made this year, likely due to visitors checking on COVID-19 restrictions, etc.

Information Source	Percentage
Call hotel/motel/condo	31%[1]
Visitor guide	19%
Fort Myers-Sanibel E-newsletter	19%
Call VCB	16%
Call local Chamber of Commerce	15%
Other	3%
None/Did not request info	46%

[1]Multiple responses permitted.

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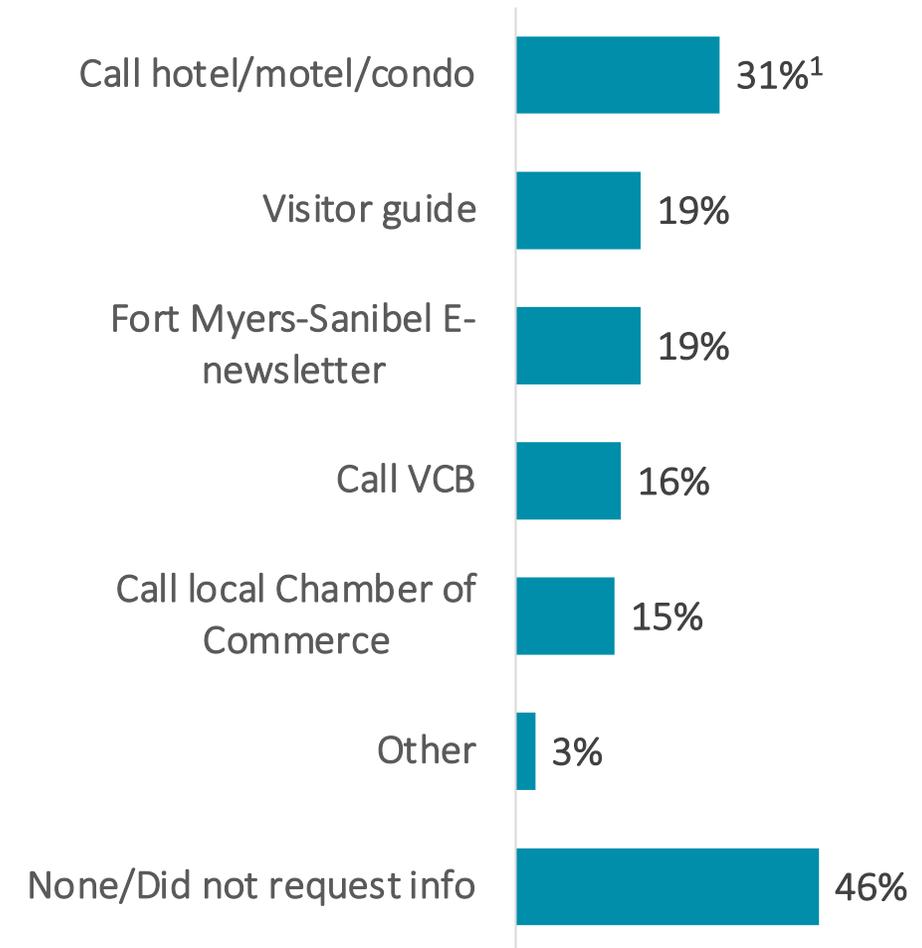
Trip Planning: Other destinations considered

12% of visitors considered choosing other destinations when planning their trips.

Tampa - Clearwater - St. Pete — 2%

Sarasota/Siesta Key — 2%

Keys/Key West — 2%

Miami — 1%

Orlando — 1%

Other destinations in Florida — 2%

Other destinations outside of Florida — 2%

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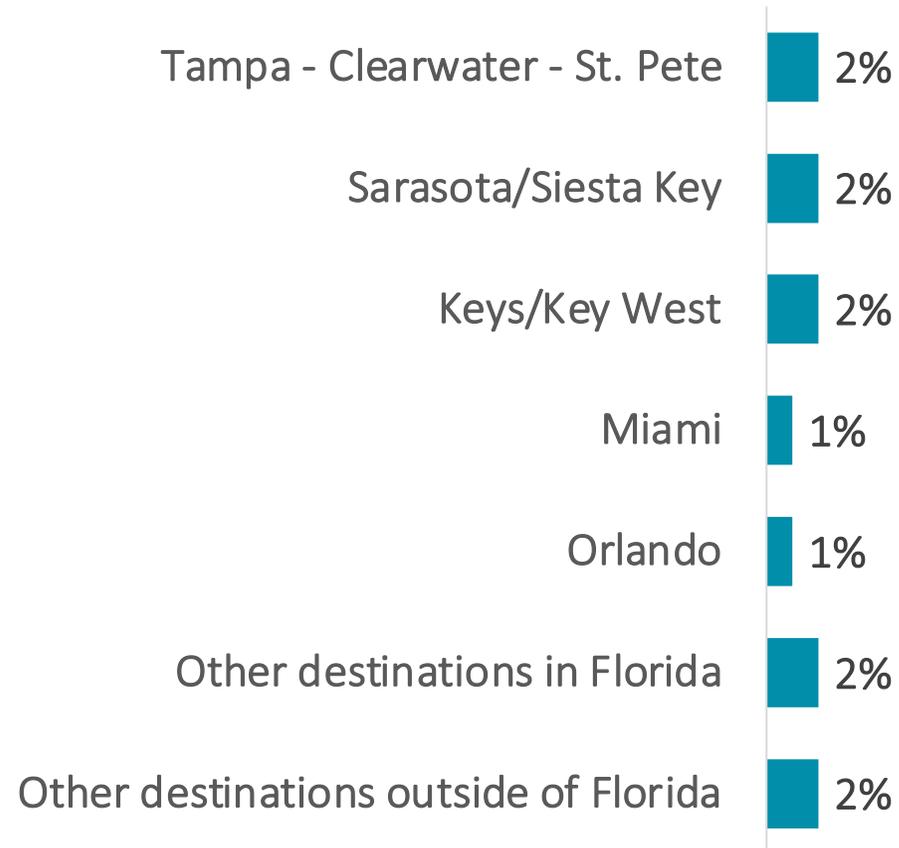
Trip Influencers

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

Peace, safety, and cleanliness were top-of-mind for visitors planning trips to The Beaches of Fort Myers & Sanibel , likely due to the COVID-19 Pandemic.

Attribute	Score
Peaceful/relaxing	96%[1]
A safe destination	92%
Clean, unspoiled environment	91%
White sandy beaches	87%
Convenient location	83%
Warm weather	82%
A "family" atmosphere	80%
Plenty to see and do	80%
Value for your travel dollar	79%
Reasonably priced lodging	78%

[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.

THE BEACHES OF FORT MYERS AND SANIBEL

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Reason for visiting

Reason	Percentage
Vacation	45%[1]
Beach	44%
Relax and unwind	30%
Visiting friends or relatives	18%
Fishing, etc.	10%
Nature, environment, bird watching	8%
Shopping	8%
Biking, hiking, etc.	7%
Water sports	7%
Photography	6%
Special occasion	5%
Special event	5%
Attractions	5%
Culture	5%
Museums, history	5%
Golf or tennis	5%
Diving/snorkeling	5%
Sporting events	4%
Guided Tours	3%
Volunteering	3%
Business conference/meeting	2%
Other	1%

[1]Three responses permitted.

Pre-Visit
July – Sept 2020

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Promotions

36% of visitors recalled promotions in the past 6 months for The Beaches of Fort Myers & Sanibel.

Visitors were more likely to recall social media and online promotions.

Source of Promotion

Source	Percentage
Social media	37%[1]
Internet	36%
Television	18%
Travel/visitor guide	17%
Brochure	15%
www.FortMyers-Sanibel.com	15%
Magazine	15%
AAA	12%
Traveler reviews/blogs	11%
Newspaper	10%
Radio	8%
Deal-based promotion	8%
Billboard	8%
Other	4%

[1]Multiple responses permitted.

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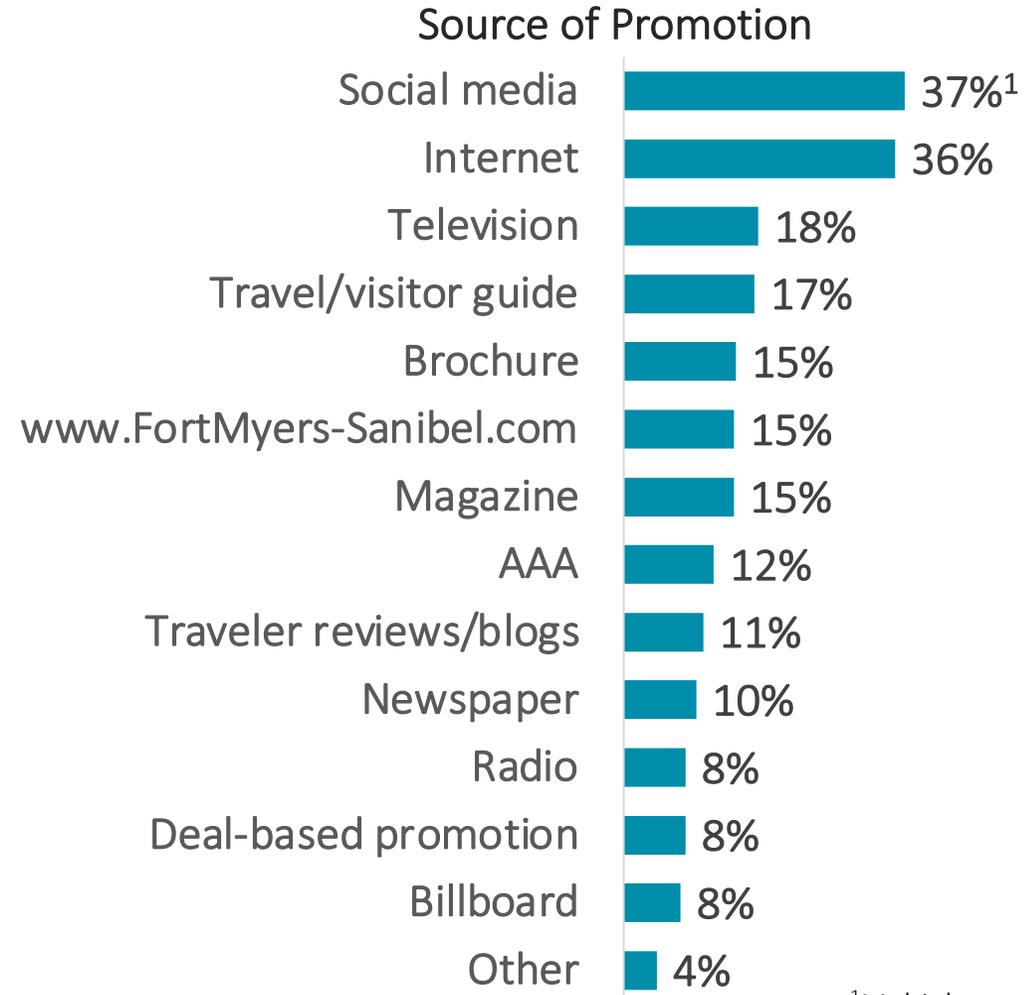
Booking

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

Together, short-term rental platforms such as VRBO and Airbnb accounted for **1 in 4** bookings.

Booking method	Percentage
Directly with hotel	37%
Online travel agency	21%
Through a vacation rental company	15%
Airbnb	13%
VRBO, HomeAway	11%
Other	4%
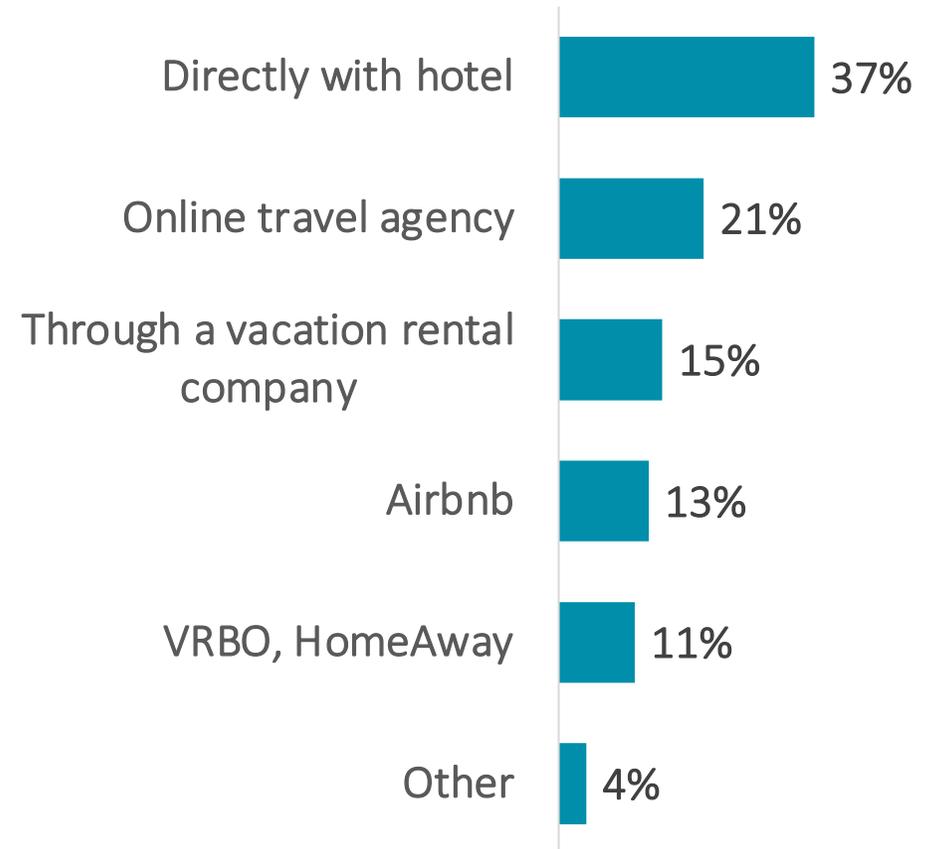
Transportation

Over half of visitors flew to The Beaches of Fort Myers & Sanibel.

Mode	Percent
Fly	55%
Drive a personal vehicle	41%
Drive a rental vehicle	2%
Drive a RV	1%
Travel by bus	0%
Other	1%

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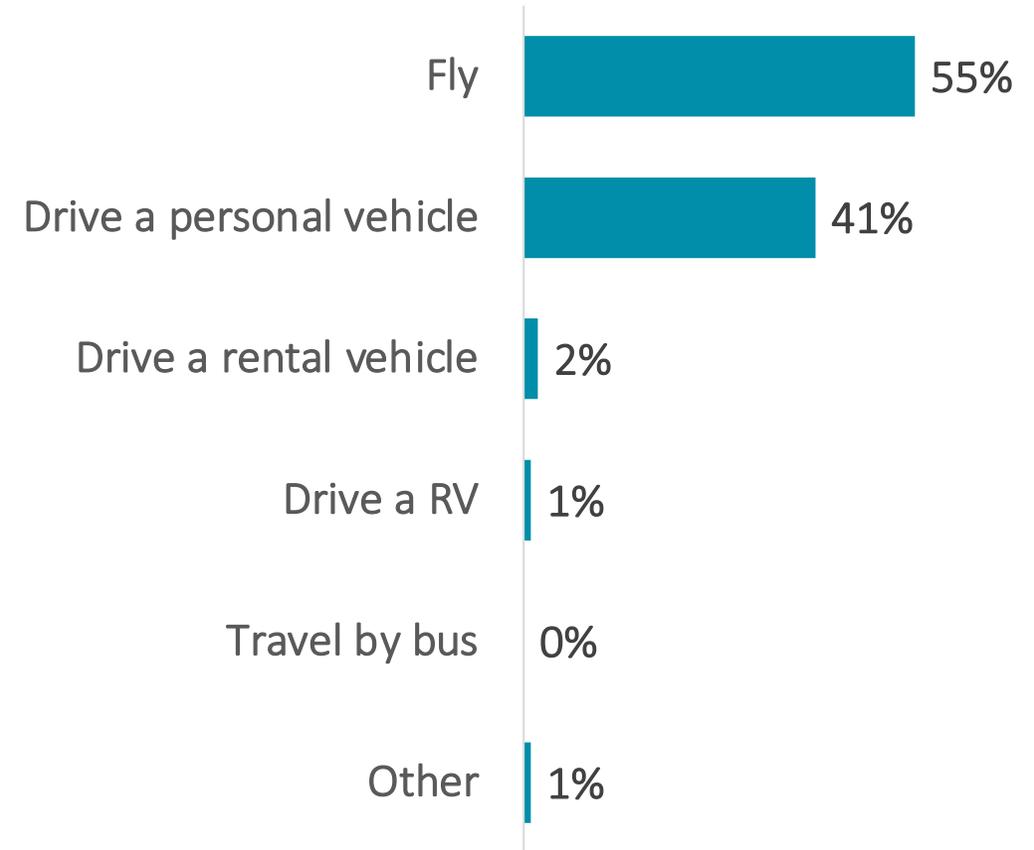
Airport

Over **4 in 5** visitors who flew to The Beaches of Fort Myers & Sanibel came through RSW.
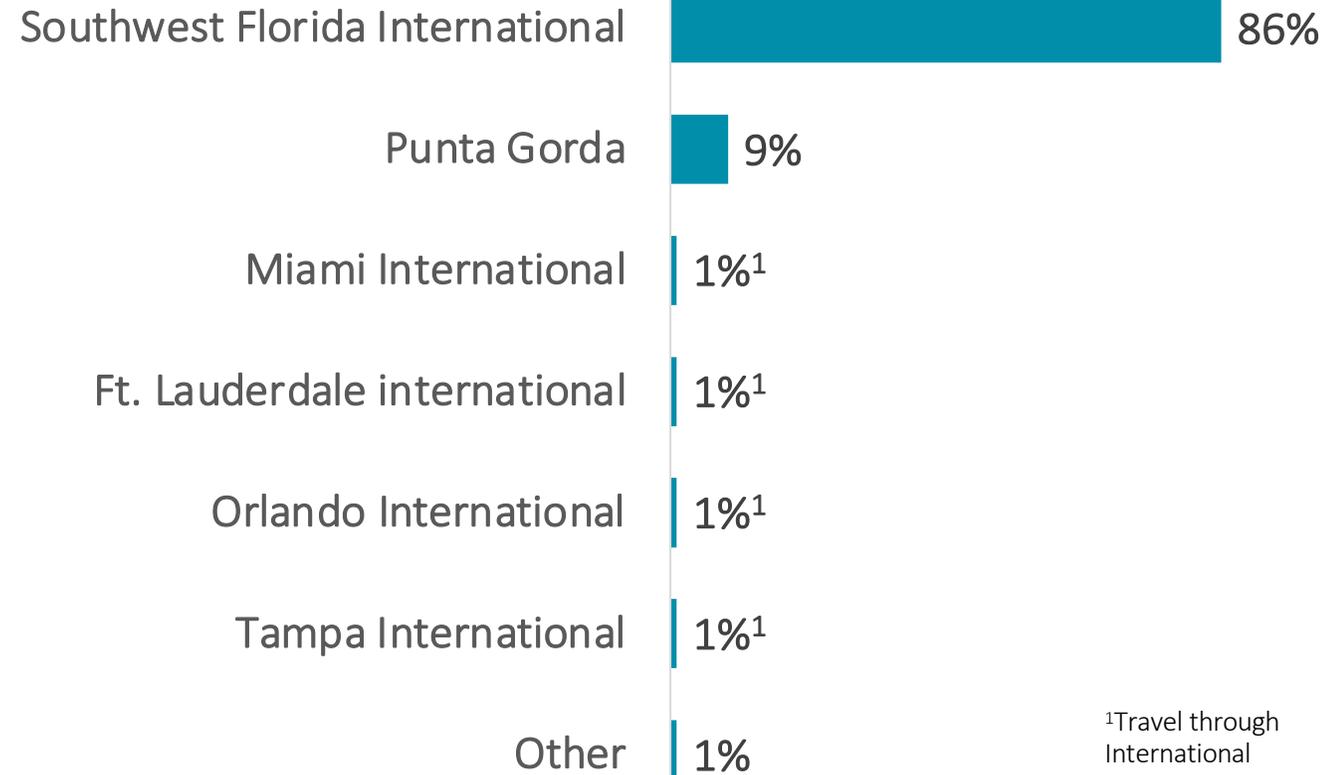
Airport	Percentage
Southwest Florida International	86%
Punta Gorda	9%
Miami International	1%[1]
Ft. Lauderdale international	1%[1]
Orlando International	1%[1]
Tampa International	1%[1]
Other	1%

[1]Travel through International airports was down due to the decrease in international visitors due to the COVID-19 crisis.

Pre-Visit
July – Sept 2020

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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	23%
2-3 trips	17%
4-5 trips	9%
6 or more trips	2%

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Pre-Visit
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Visitor Journey: Travel Party Profile

Pre-Visit

Travel Party Profile

Trip Experience

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Travel Party Profile
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R E S E A R C H

Origin[1]

Region	Percentage
Florida	18%
Southeast	20%
Northeast	19%
Midwest	37%
West	5%
Canada	<1%
United Kingdom	1%
Germany	<1%
Other Europe	<1%
Other International	<1%

99%
of visitors came from **the US.**

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

Travel Party Profile
July – Sept 2020

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Number of Visitors by Origin

Florida — 134,430
Southeast — 148,980
Northeast — 141,450
Midwest — 277,640
West — 37,110
Canada — 2,260
United Kingdom — 7,520
Germany — 760
Other Europe — 1,500
Other International — 750

Visitation was down across the board, but especially so for:

-98.6% - Germany
-97.7% - Other International countries
-95.5% - Other European countries
-89.8% - Canada
-77.3% - United Kingdom

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Travel Party Profile
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Number of Visitors by Origin

Domestic Out-of-State: 605,180

In-State: 134,430

International: 12,790

Domestic Out-of-State: 85%
In-State: 14%
International: 1%
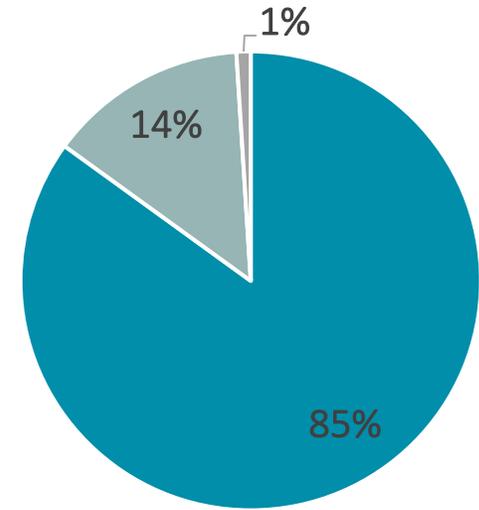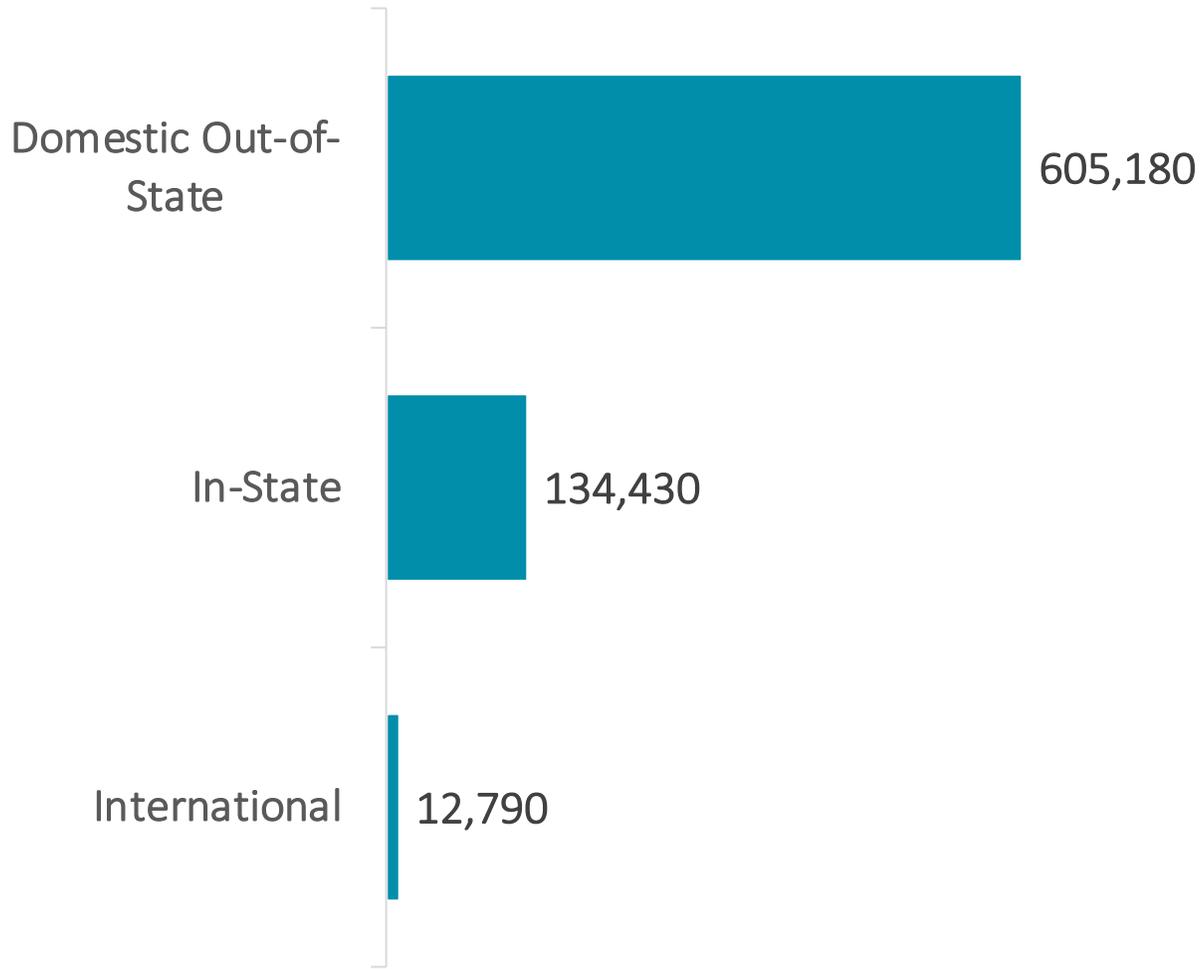
- Domestic Out-of-State
- In-State
- International

Travel Party Profile
July – Sept 2020

Origin Country

Country	% of Visitors
United States	99%
Germany	<1%
Canada	<1%
United Kingdom	1%
Other	<1%

Travel Party Profile
July – Sept 2020

Origin Markets[1]

Market	Percentage of Visitors
New York City	9%
Miami-Ft. Lauderdale	9%
Chicago	5%
Cincinnati	5%
Washington DC-Baltimore	5%
Detroit	4%
Columbus, OH	3%
Minneapolis	3%
Cleveland	3%
Tampa-Clearwater-St. Petersburg	3%
Atlanta	3%
Pittsburgh	3%
Nashville	3%
Louisville	3%
St. Louis	2%
Boston	2%
Philadelphia	2%
Indianapolis	2%
Orlando	2%
Austin	2%
Dallas-Ft. Worth	2%
Grand Rapids	2%
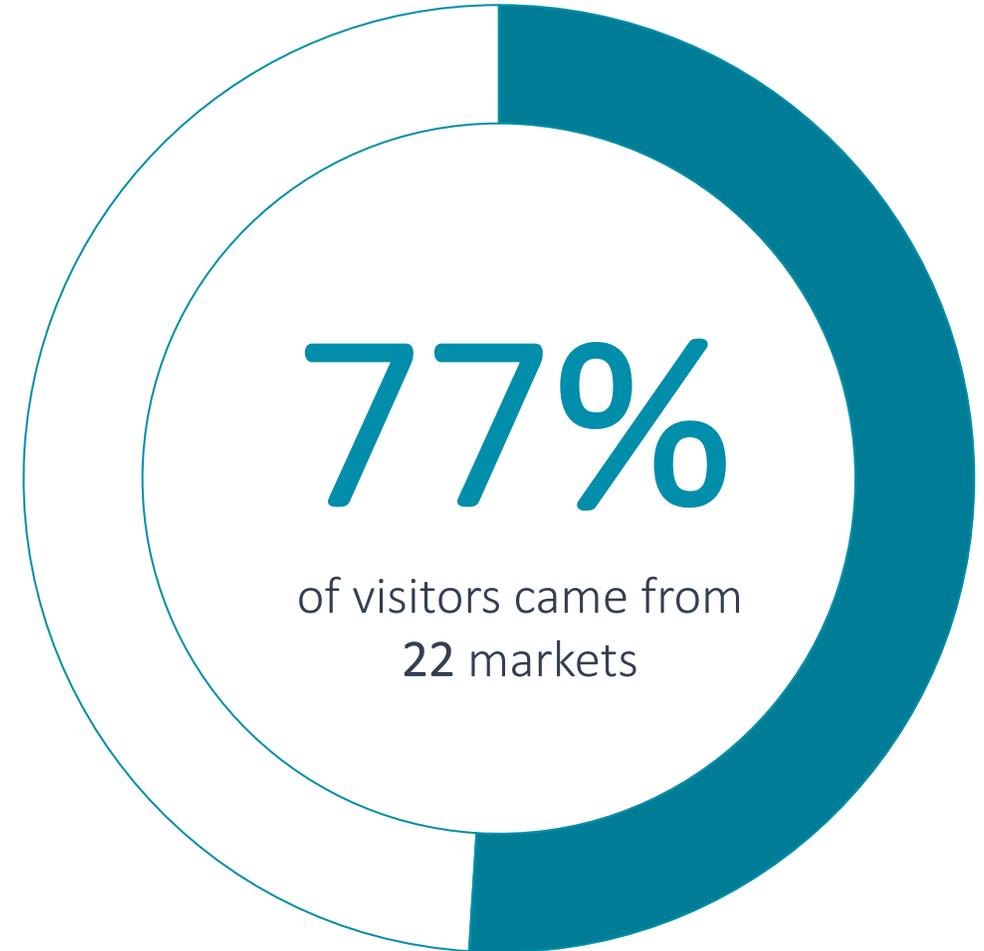
77%

of visitors came from
22 markets

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

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Travel Party Profile
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Travel Party Size and Composition

Travel Party Size
Visitors traveled in a party composed of **3.8**[1] people.

Travel with Children
38% of visitors traveled with children under the age of 18.

Solo traveler	6%
2 people	27%
3 people	14%
4 people	19%
5+ people	34%

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

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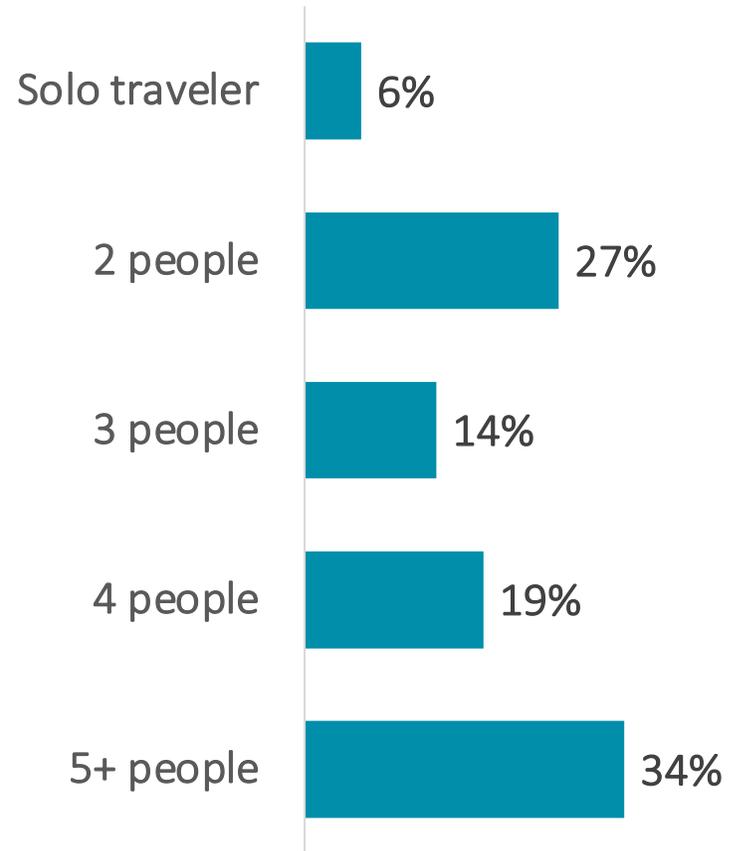
Travel Party Type

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

Travel Party Type	Percentage
Family	51%
Couple	30%
Group of couples/friends	9%
Single	6%
With business associates	3%
In a tour group	1%

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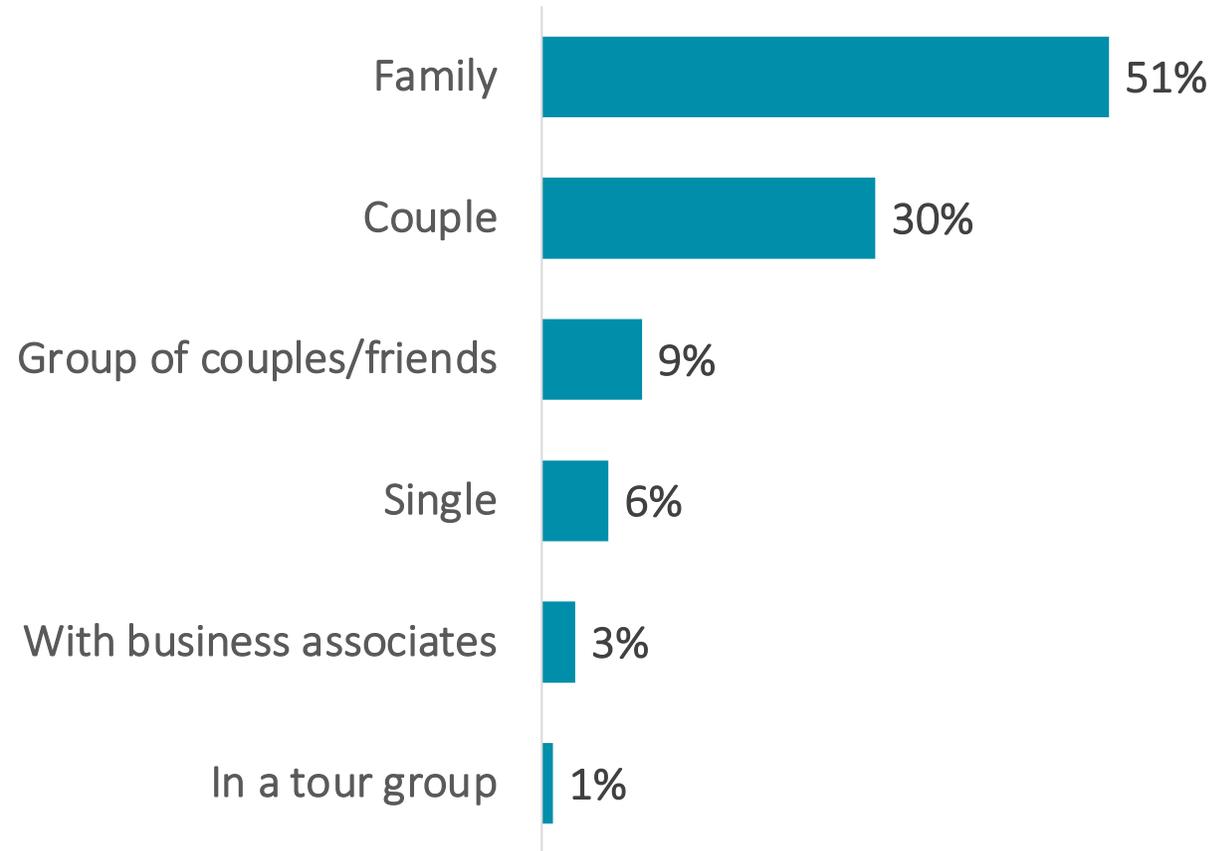
Age

Average Age

The average age of July - Sept visitors was **47 years old.**

The typical visitor was younger in 2020 compared to 2019.

Younger than 25 — 6%

25-39 — 26%

40-54 — 45%

55-69 — 20%

70+ — 3%

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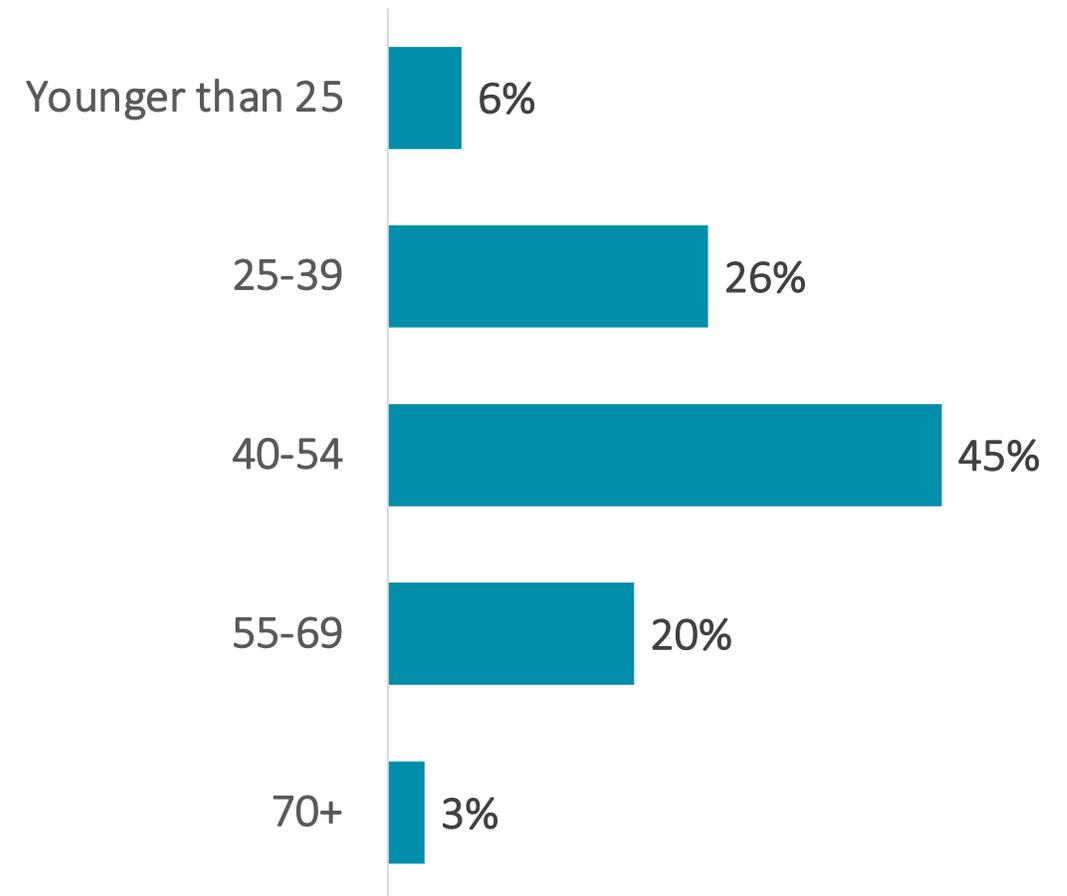
Household Income

Median Household Income
July - Sept visitors had a median household income of **$111,300.**

1 in 8 households earned **more than $200,000**.

Income	Percentage
<$50,000	12%
$50,000 - $74,999	12%
$75,000 - $99,999	17%
$100,000 - $124,999	20%
$125,000 - $149,999	13%
$150,000 - $199,999	14%
$200,000 - $249,999	6%
$250,000 and over	6%

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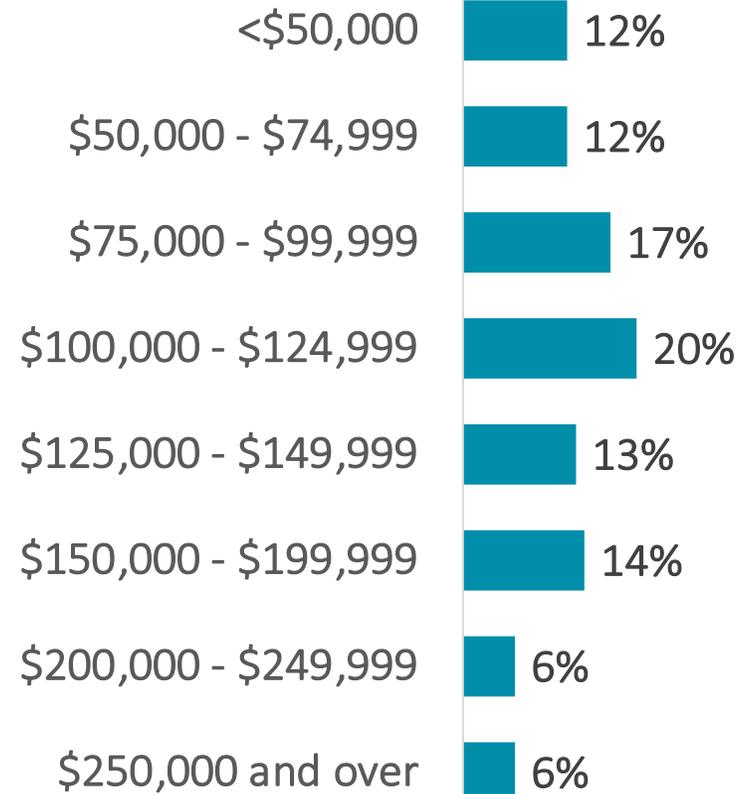
Marital Status

Married   Single

Travel Party Profile
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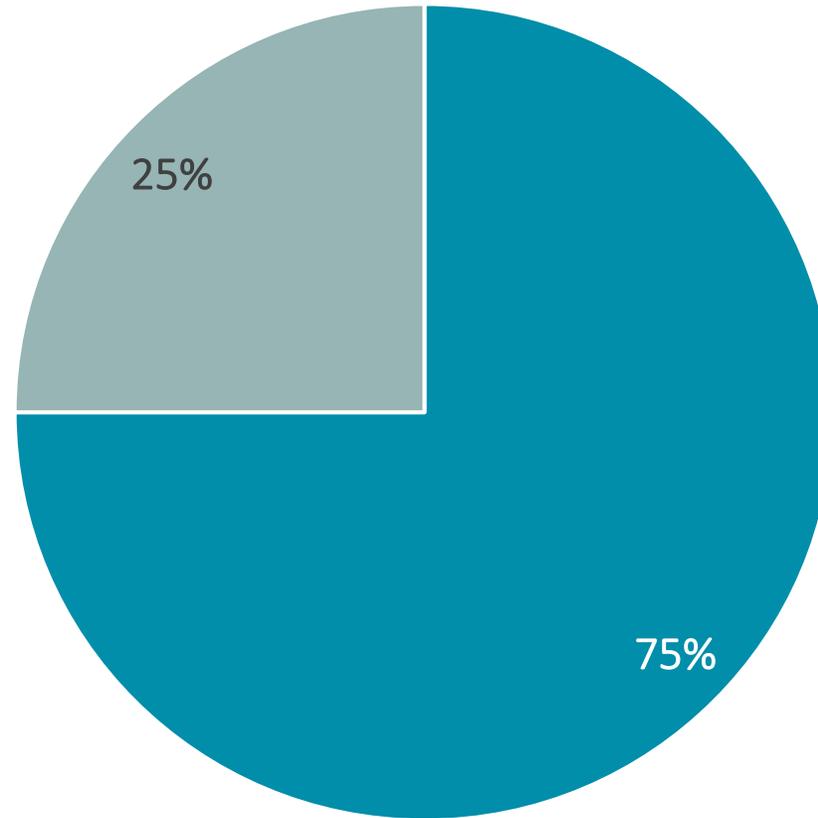
Education

College Education
57% of July - Sept visitors were college graduates.

Some high school or high school degree — 12%

Some college or Associate degree — 31%

College Graduate — 42%

Post Graduate work or degree — 15%

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Travel Party Profile
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Race/Ethnicity

Caucasion or white	76%
Hispanic	8%
African American	6%
Asian	6%
Other	4%

Travel Party Profile
July – Sept 2020

Gender

41%

59%

■ Male ■ Female

Travel Party Profile
July – Sept 2020

Visitor Journey: Trip Experience

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Accommodations

3 in 4 visitors stayed in paid accommodations such as hotels, motels, resorts, B&Bs, condos, vacation rentals, or RV Parks & campgrounds.

Hotel/Motel/Resort/B&B — 39%

Condo/Vacation rental — 33%

Non-paid accommodations — 24%

RV Park/Campground — 2%

Day tripper — 2%

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Travel Party Profile
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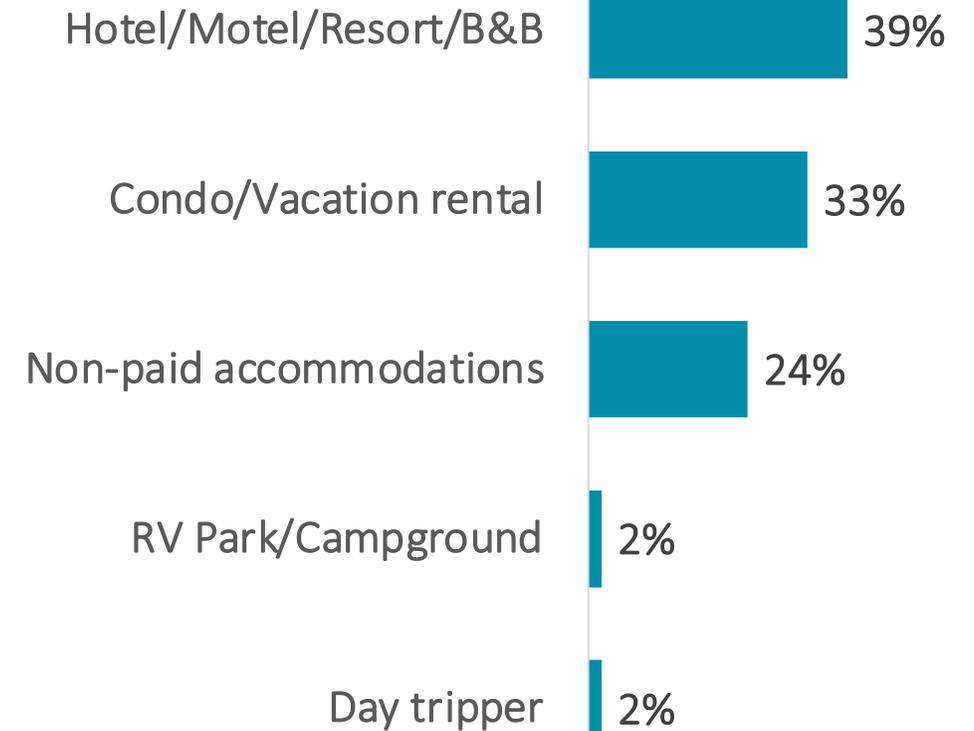
Nights Stayed

All Visitors
Visitors spent 8.7[1] nights in The Beaches of Fort Myers & Sanibel.

Visitors Staying in Paid Accommodations
Visitors staying in paid accommodations spent 7.5[2] nights in The Beaches of Fort Myers & Sanibel.
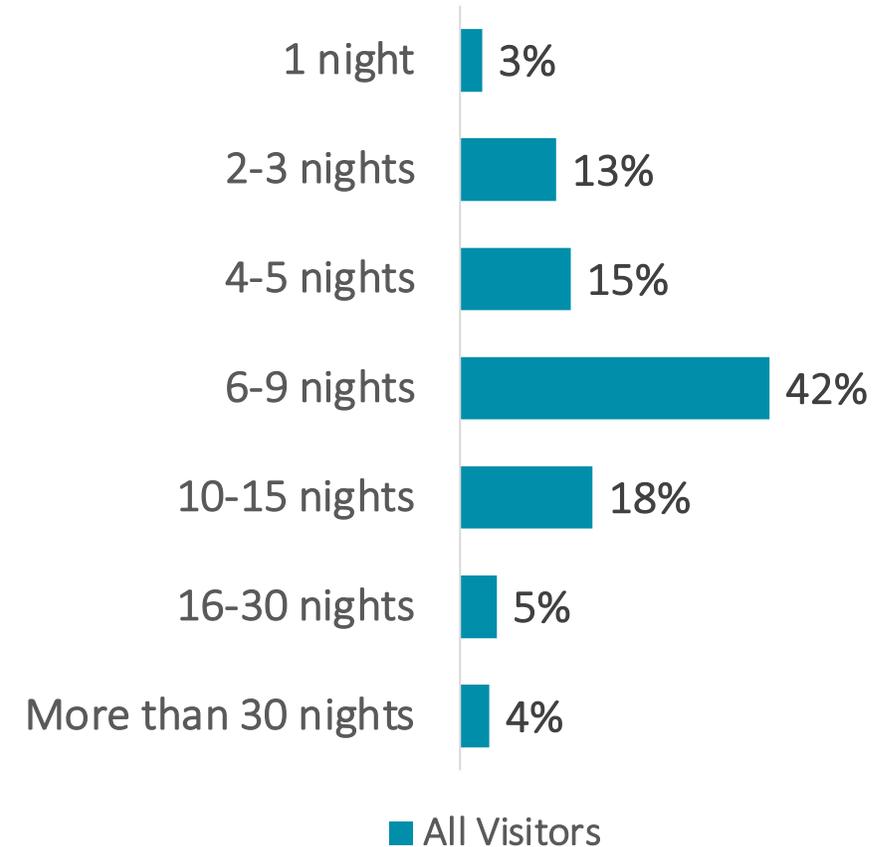
[1]When including extended stay visitors, average nights stayed for all visitors was 8.9 nights. Source: Visitor Tracking Survey
[2]When including extended stay visitors, average nights stayed for visitors staying in paid accommodations was 7.7 nights. Source: Visitor Tracking Survey

Nights	All Visitors
1 night	3%
2-3 nights	13%
4-5 nights	15%
6-9 nights	42%
10-15 nights	18%
16-30 nights	5%
More than 30 nights	4%

■ All Visitors

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Travel Party Profile
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First Time and Experienced Visitors

First Time vs. Repeat Visitors
Over **1 in 4** visitors were visiting for the first time.

First-time — 27%

2-5 visits — 27%

6-10 visits — 21%

11+ visits — 25%

Travel Party Profile
July – Sept 2020

Visitor Activities

Activity	Percentage
Beaches	69%[1]
Relax & unwind	55%
Dining	45%
Shopping	32%
Nature, environment, bird watching	29%
Visiting friends/relatives	23%
Water sports	23%
Fishing	18%
Biking, hiking etc.	16%
Bars, nightlife	13%
Photography	12%
Attractions	12%
Golf or tennis	9%
Diving/snorkeling	7%
Museums, history	7%
Guided tours	7%
Special occasion	6%
Culture	6%
Spas	6%
Sporting event	5%
Special event	5%
Business conference or meeting	4%
Volunteering	3%
Other	3%

[1]Multiple responses permitted.

THE BEACHES OF FORT MYERS AND SANIBEL

Travel Party Profile
July – Sept 2020

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Reason for Visiting vs. Visitor Activities

Key Reasons for Visiting

Trip Enhancements

	Reason for Visiting	Visitor Activities
Beaches	44%[1]	69%[2]
Relax & unwind	30%	55%
Visiting friends/relatives	18%	23%
Fishing	10%	18%
Nature	8%	29%
Shopping	8%	32%
Biking, hiking	7%	16%
Water sports	7%	23%
Photography	6%	12%
Attractions	5%	12%
Culture	5%	6%
Diving/snorkeling	5%	7%
Golf or tennis	5%	9%
Museums, history	5%	7%
Special event	5%	5%
Special occasion	5%	6%
Sporting event	4%	5%
Guided tours	3%	7%
Volunteering	3%	3%
Business	2%	4%

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

THE BEACHES OF FORT MYERS AND SANIBEL

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Attractions Visited

Attraction	Percentage
Beaches	69%[1]
Fort Myers Beach Pier	33%
Sanibel Lighthouse	33%
Sanibel Outlets	19%
Miromar Outlets Mall	14%
J.N. Ding Darling National Wildlife Refuge	13%
Edison & Ford Winter Estates	12%
Shell Factory and Nature Park	11%
Periwinkle Place	10%
Coconut Point Mall	8%
Gulf Coast Town Center	8%
Manatee Park	8%
Bell Tower Shops	7%
Bailey-Matthews Shell Museum	3%
Broadway Palm Dinner Theater	2%
Barbara B. Mann Performing Arts Hall	2%
Other	4%
None	7%

[1]Multiple responses permitted.

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Visitor Journey: Post-Trip Evaluation

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Satisfaction

Likely to recommend — 94%

Likely to return — 94%

Likely to return next year — 66%

Satisfaction Ratings

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents[1]	
	2019	2020	2019	2020	2019	2020	2019	2020
Likely to Recommend	88%	93%	92%	95%	90%	94%	96%	98%
Likely to Return	82%	90%	93%	95%	92%	95%	85%	94%
Likely to Return Next Year	44%	45%	67%	76%	62%	67%	51%	55%

[1]Interpret results with caution: small sample size of international visitors.

THE BEACHES OF FORT MYERS AND SANIBEL

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Satisfaction

Satisfaction with Overall Visit

Very satisfied	Satisfied	Neither	Dissatisfied/Very dissatisfied	Don't know
64%	32%	2%	1%	1%

Satisfaction with Customer Service

Very satisfied	Satisfied	Neither	Dissatisfied/Very dissatisfied	Don't know
61%	32%	4%	1%	2%

■ Very satisfied   ■ Satisfied   ■ Neither   ■ Dissatisfied/Very dissatisfied   ■ Don't know

THE BEACHES OF
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Post-Trip Evaluation
July – Sept 2020

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Satisfaction Ratings: Overall Visit

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents[1]	
	2019	2020	2019	2020	2019	2020	2019	2020
Very Satisfied	65%	65%	72%	68%	70%	66%	69%	89%
Satisfied	29%	31%	20%	29%	23%	30%	26%	11%

[1]Interpret results with caution: small sample size of international visitors.

Post-Trip Evaluation
July – Sept 2020

THE BEACHES OF
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Satisfaction Ratings: Customer Service

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents[1]	
	2019	2020	2019	2020	2019	2020	2019	2020
Very Satisfied	63%	61%	62%	62%	63%	61%	62%	25%
Satisfied	30%	31%	30%	31%	30%	31%	30%	72%

[1]Interpret results with caution: small sample size of international visitors.

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Satisfaction Ratings: Quality of Accommodations

Quality of Accommodations

- Far exceeded/exceeded expectations
- Met expectations
- Did not meet/far below expectations

Post-Trip Evaluation
July – Sept 2020
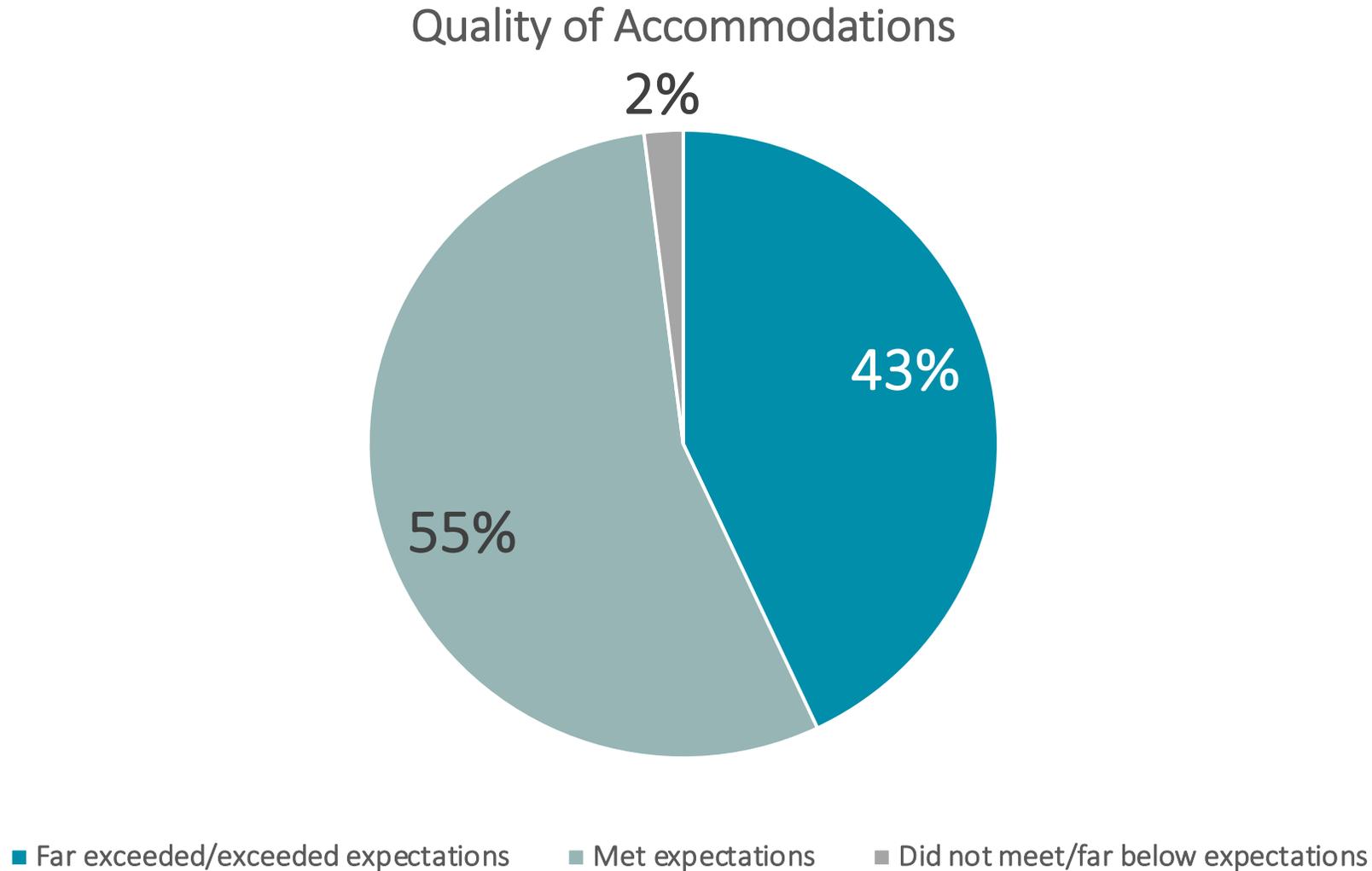
Satisfaction Ratings: Quality of Accommodations

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents[1]	
	2019	2020	2019	2020	2019	2020	2019	2020
Exceeded Expectations	40%	49%	42%	43%	41%	43%	43%	45%
Met Expectations	56%	49%	55%	55%	57%	54%	56%	53%
Did Not Meet Expectations	4%	2%	3%	2%	2%	3%	1%	2%

[1]Interpret results with caution: small sample size of international visitors.

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Post-Trip Evaluation
July – Sept 2020
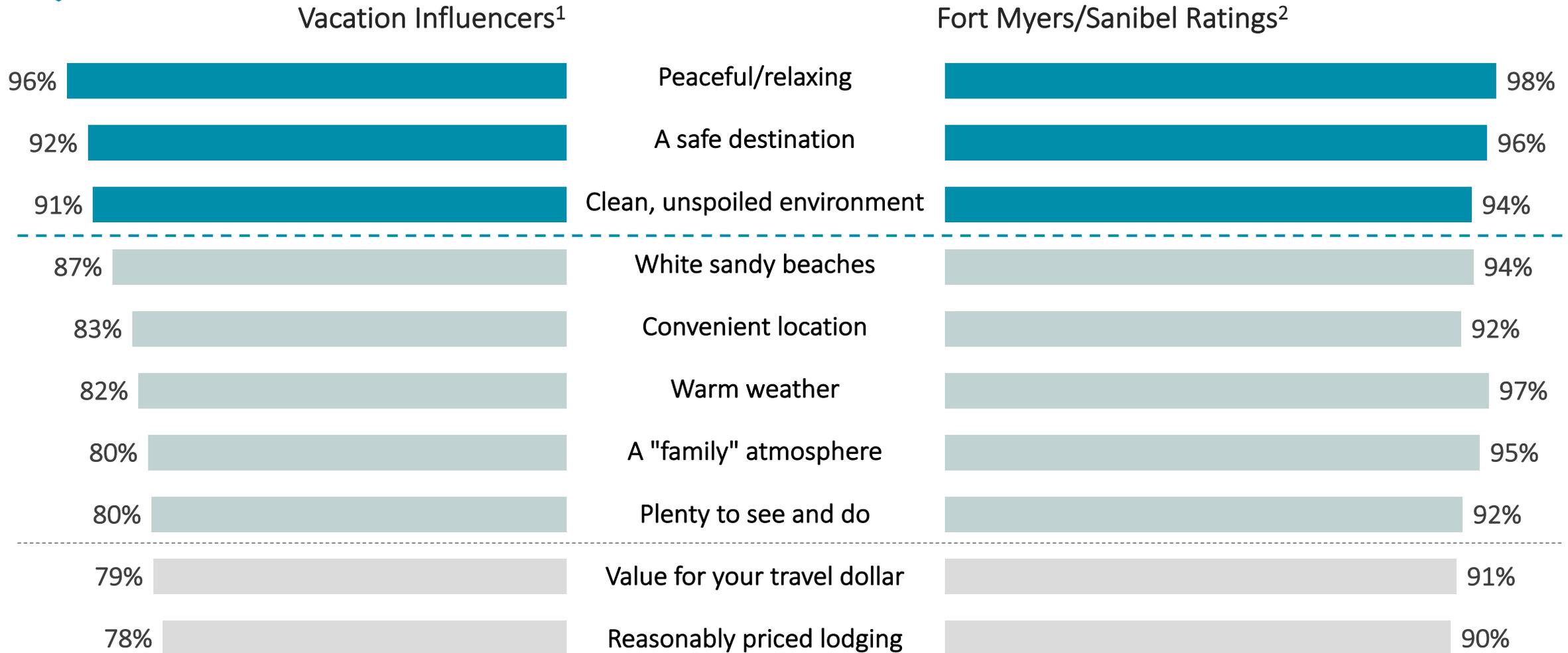
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Attribute Ratings

At least **95%** of visitors gave high experience ratings for peace, warm weather, safety and a family atmosphere in The Beaches of Fort Myers & Sanibel.
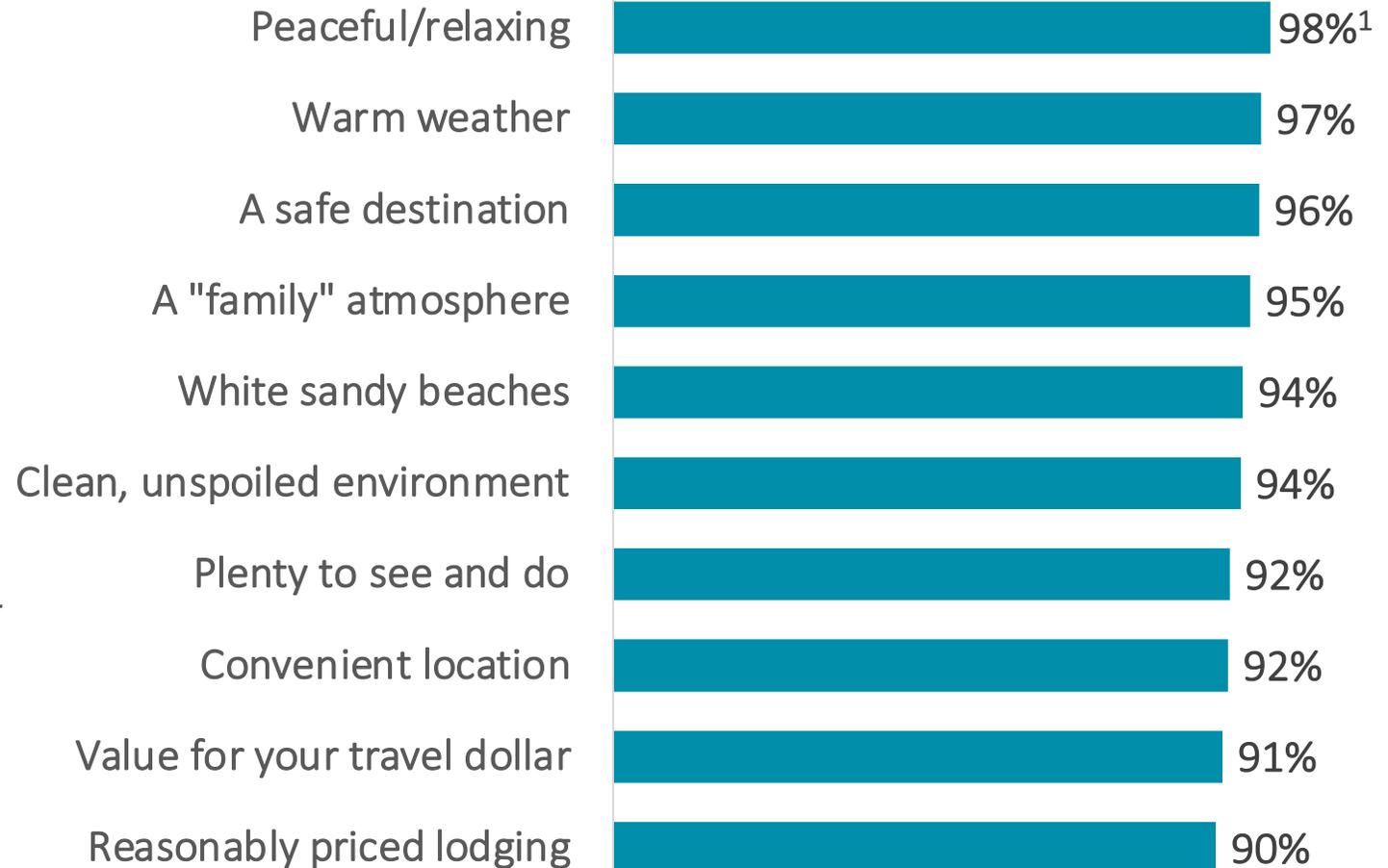
Attribute	Rating
Peaceful/relaxing	98%[1]
Warm weather	97%
A safe destination	96%
A "family" atmosphere	95%
White sandy beaches	94%
Clean, unspoiled environment	94%
Plenty to see and do	92%
Convenient location	92%
Value for your travel dollar	91%
Reasonably priced lodging	90%

[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

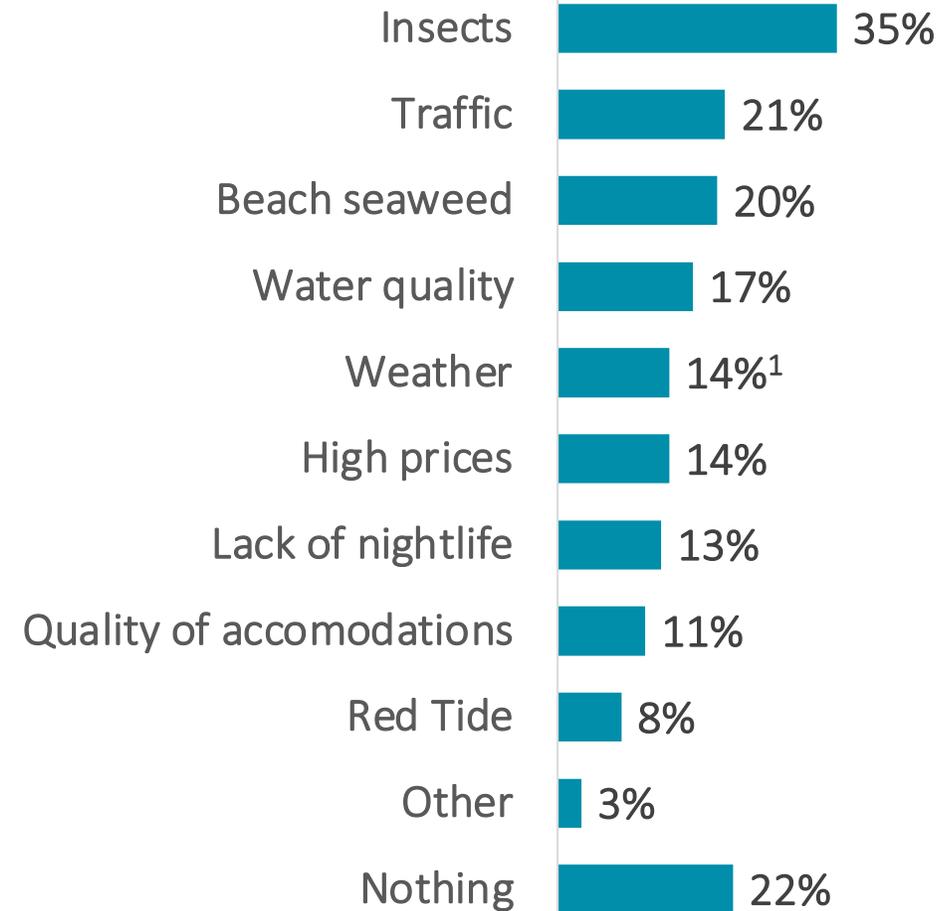| Vacation Influencers[1]		Fort Myers/Sanibel Ratings[2]
96%	Peaceful/relaxing	98%
92%	A safe destination	96%
91%	Clean, unspoiled environment	94%
87%	White sandy beaches	94%
83%	Convenient location	92%
82%	Warm weather	97%
80%	A "family" atmosphere	95%
80%	Plenty to see and do	92%
79%	Value for your travel dollar	91%
78%	Reasonably priced lodging	90%

[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 1 in 3 visitors were concerned about insects.

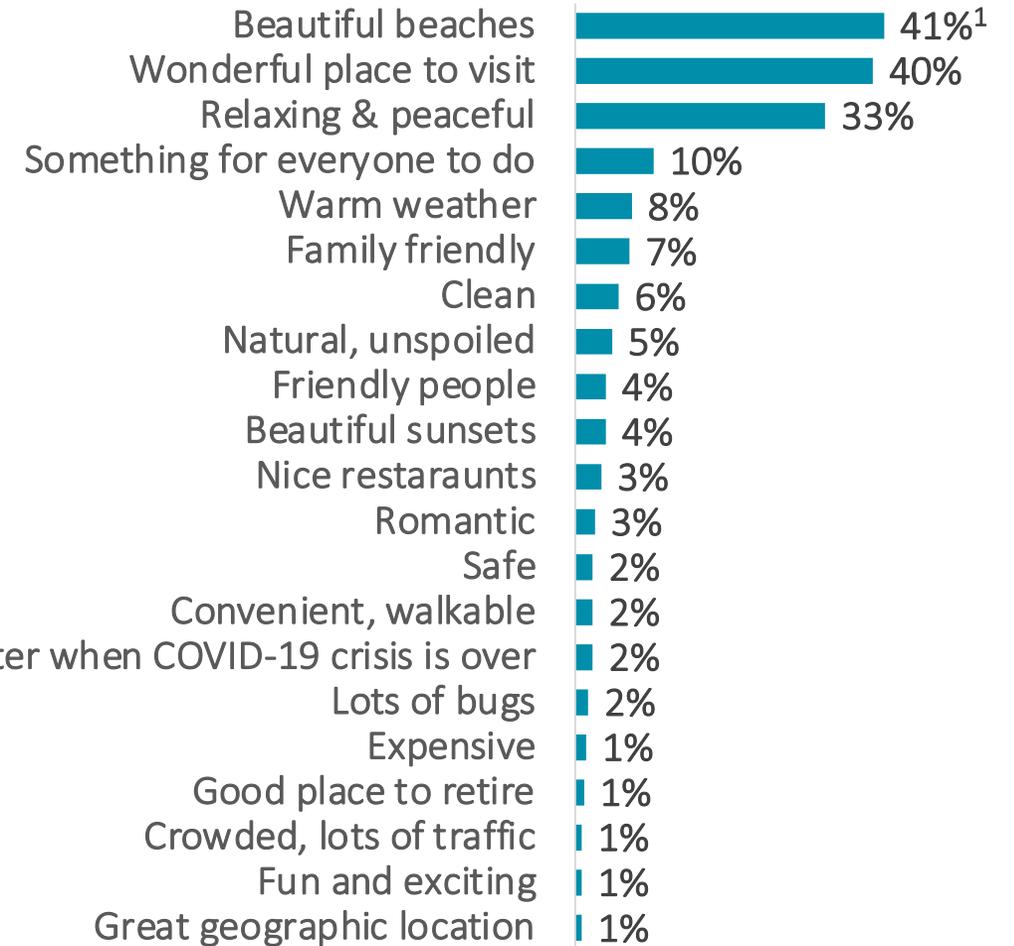At least one water condition issue was mentioned by 41% of visitors.

Concern	Percentage
Insects	35%
Traffic	21%
Beach seaweed	20%
Water quality	17%
Weather	14%[1]
High prices	14%
Lack of nightlife	13%
Quality of accomodations	11%
Red Tide	8%
Other	3%
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** with **beautiful beaches** and a **relaxing and peaceful** atmosphere.

Only 4% had a negative comment in describing the destination.

Beautiful beaches	41%[1]
Wonderful place to visit	40%
Relaxing & peaceful	33%
Something for everyone to do	10%
Warm weather	8%
Family friendly	7%
Clean	6%
Natural, unspoiled	5%
Friendly people	4%
Beautiful sunsets	4%
Nice restaraunts	3%
Romantic	3%
Safe	2%
Convenient, walkable	2%
Will be better when COVID-19 crisis is over	2%
Lots of bugs	2%
Expensive	1%
Good place to retire	1%
Crowded, lots of traffic	1%
Fun and exciting	1%
Great geographic location	1%

[1]Coded verbatim responses; multiple responses permitted.

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Area Descriptions

Beautiful Beaches

- "Beautiful Gulf beach with warm clear water. A more 'upscale' area of Florida that was quiet and relaxing. Lots of natural, unspoiled areas to enjoy!"
- "A beautiful beach in Florida. Warm weather and a good amount of waves for fun in the water."
- "A very pleasant place and beautiful environment. It's a place that you always want to go back!"

Wonderful Place to Visit

- "Wonderful place to stay, relax, and enjoy the beautiful beach and nature."
- "As Florida residents, we can easily travel to Sanibel and feel like we are somewhere else. It's amazing how the causeway takes you to the island but it's like you have been transported somewhere else. Somewhere special."
- "Nice place to visit - highly recommend."
- "Great place every time I visit."

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RESEARCH

Area Descriptions

Relaxing and Peaceful

- "Beautiful, laid back unspoiled surroundings and really good food!"
- "Relaxing and beautiful with natural landscapes, animals, and birds."
- "Very peaceful when you want to get away from stress, and people here are very calming and nice. Not rude like in Los Angeles."
- "Fort Myers is a great place to relax and unwind. It is not overly crowded and has a lot of great, hidden gem restaurants."

Something for Everyone to Do

- "South Florida vibes with lots of palm trees and beach access! Well developed so there are plenty of things to do."
- "White beaches and lots to do."
- "This is a nice serene area with white sandy beaches. There is a lot to do like museums and shopping. It's just a fun area."
- "Beautiful, plenty to do and see, good restaurants and bars."

Occupancy Barometer: October – December Reservations

Oct – Dec Reservations	July - Sept 2019	July - Sept 2020
Up	40%	1%
Same	34%	18%
Down	25%	79%
Not Sure	1%	2%

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Occupancy Barometer: January – March Reservations

Jan – Mar Reservations	July - Sept 2019	July - Sept 2020
Up	36%	3%
Same	44%	20%
Down	13%	73%
Not Sure	8%	4%

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Year-Over-Year Comparisons

Economic Impact

Visitor & Lodging Statistics	July - Sept 2019	July - Sept 2020	% Change
Visitors	1,102,500	752,400	-31.8%
Room Nights	975,200	846,900	-13.2%
Direct Expenditures	$548,970,200	$500,650,800	-8.8%
Total Economic Impact	$891,527,600	$813,056,900	-8.8%
Occupancy	45.6%	39.7%	-12.9%
ADR	$122.54	$127.24	+3.8%
RevPAR	$55.93	$50.51	-9.7%

Jobs, Wages and Taxes Supported by Tourism

	July - Sept 2019	July - Sept 2020	% Change
Direct Jobs	7,378	6,529	-11.5%
Total Jobs	10,317	9,110	-11.7%
Direct Wages	$165,493,000	$146,615,200	-11.4%
Total Wages	$276,479,600	$245,104,600	-11.3%
Direct Local Taxes	$16,743,600	$15,169,700	-9.4%
Total Local Taxes	$30,133,600	$27,074,800	-10.2%
Direct State Taxes	$39,031,800	$35,045,600	-10.2%
Total State Taxes	$58,395,100	$52,035,600	-10.9%

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Economic Impact on Destination
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Visitor Type

Visitor Type	July - Sept 2019	July - Sept 2020
Visitors in Paid Accommodations	66%	72%
Visitors in Non-Paid Accommodations	31%	26%
Day Trippers	3%	2%

Pre-Visit

Planned trip in advance	July - Sept 2019	July - Sept 2020
1 week or less	8%	6%
2-4 weeks	12%	17%
1-2 months	26%	35%
3-6 months	29%	26%
6 months or more	25%	16%

Considered Other Destinations	July - Sept 2019	July - Sept 2020
Yes	16%	12%
No	84%	88%

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Pre-Visit

Trip Planning Online Sources[1]	July – Sept 2019	July – Sept 2020
Search engines	20%	31%
Airline websites	34%	22%
Booking websites	18%	22%
Airbnb, VRBO, HomeAway	15%	21%
Trip Advisor	17%	20%
Hotel websites	20%	17%
Vacation rental websites	11%	16%
VCB Social Media	7%	13%
www.FortMyers-Sanibel.com	7%	12%
Facebook	7%	11%
Travel reviews, blogs, stories, etc.	5%	10%
Visit Florida	6%	10%
Instagram	4%	8%
YouTube, Hulu, Pandora	3%	6%
Other	9%	3%
None/Don't visit websites	20%	10%

[1]Multiple responses permitted.

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Pre-Visit
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Pre-Visit

Information Requests[1]	July - Sept 2019	July - Sept 2020[2]
Call hotel/motel/condo	8%	31%
Visitor guide	3%	19%
Fort Myers-Sanibel E-newsletter	2%	19%
Call VCB	2%	16%
Call local Chamber of Commerce	2%	15%
Other	5%	3%
None/Did not request info	82%	46%

[1]Multiple responses permitted.
[2]Significantly more information requests were made this year, likely due to visitors checking on COVID-19 restrictions, etc.

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Pre-Visit

Recall of Lee County Promotions	July - Sept 2019	July - Sept 2020
Yes	31%	36%
No	55%	43%
Can't recall	14%	20%

Characteristics influencing decision to visit Lee County (top 2 boxes)	July - Sept 2019	July - Sept 2020
Peaceful/relaxing[1]	86%	96%
A safe destination[1]	82%	92%
Clean, unspoiled[1]	78%	91%
White sandy beaches	80%	87%
Convenient location	75%	83%
Warm weather	78%	82%
Plenty to see and do	72%	80%
A "family" atmosphere	71%	80%
Value for your travel dollar	67%	79%
Reasonably priced lodging	67%	78%

[1]Peace, safety, and cleanliness were top-of-mind for visitors planning trips to The Beaches of Fort Myers & Sanibel , likely due to the COVID-19 Pandemic.

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Pre-Visit

Transportation	July - Sept 2019	July - Sept 2020
Fly	60%	55%
Drive a personal vehicle	35%	41%
Drive a rental vehicle	3%	2%
Drive a RV	1%	1%
Travel by bus	0%	0%
Other	1%	1%

Airport Used (Base = Visitors who flew)	July - Sept 2019	July - Sept 2020
Southwest Florida International	66%	86%
Punta Gorda	10%	9%
Miami International[1]	9%	1%
Orlando International[1]	5%	1%
Ft. Lauderdale International[1]	3%	1%
Tampa International[1]	6%	1%
Other	1%	1%

[1]Travel through International airports was down due to the decrease in international visitors due to the COVID-19 crisis.

Travel Party Profile

Visitor Origin	July - Sept 2019	July - Sept 2020
Florida	17%	18%
Southeast	13%	20%
Northeast	18%	19%
Midwest	31%	37%
West	5%	5%
Canada	2%	<1%
United Kingdom	3%	1%
Germany	5%	<1%
Other Europe	3%	<1%
Other international	3%	<1%

Visitor Origin	July - Sept 2019	July - Sept 2020
New York City	6%	9%
Miami-Ft. Lauderdale	6%	9%
Chicago	5%	5%
Cincinnati	4%	5%
Washington DC-Baltimore	2%	5%
Detroit	1%	4%

Travel Party Profile

Travel Parties	July - Sept 2019	July - Sept 2020
Mean travel party size	3.5	3.8[1]
Travel with children under age 18	36%	38%

Travel Party Composition	July - Sept 2019	July - Sept 2020
Family	47%	48%
Couple	33%	30%
Single	12%	9%
Group of couples/friends	7%	9%
With business associates	1%	3%
In a tour group	<1%	1%

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

Travel Party Profile

Marital Status	July - Sept 2019	July - Sept 2020
Married	74%	75%
Single	26%	25%

Age	July - Sept 2019	July - Sept 2020
Average age	50	47

Household Income	July - Sept 2019	July - Sept 2020
Median Income	$100,000	$111,300

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Travel Party Profile
July – Sept 2020

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Trip Experience

Length of Stay	July - Sept 2019	July - Sept 2020
Average nights in The Beaches of Fort Myers & Sanibel	7.7	8.7

First time/Repeat Visitors	July - Sept 2019	July - Sept 2020
First-time	29%	27%
Repeat	70%	73%

Trip Experience

Activities[1]	July - Sept 2019	July - Sept 2020
Beaches	75%	69%
Relax & unwind	65%	55%
Dining	65%	45%
Shopping	46%	32%
Nature, environment, bird watching	38%	29%
Visiting friends/relatives	26%	23%
Water sports	22%	23%
Fishing	13%	18%
Biking, hiking etc.	17%	16%
Bars, nightlife	13%	13%
Photography	16%	12%
Attractions	18%	12%
Golf or tennis	9%	9%
Diving/snorkeling	4%	7%
Museums, history, etc.	9%	7%
Guided tours	6%	7%
Culture	5%	6%
Special occasion	3%	6%
Spas	4%	6%
Sporting event	5%	5%
Special event	9%	5%
Business conference or meeting	2%	4%
Volunteering	1%	3%

[1]Multiple responses permitted.

Trip Experience

Attractions[1]	July - Sept 2019	July - Sept 2020
Beaches	75%	69%
Fort Myers Beach Pier	33%	33%
Sanibel Lighthouse	32%	33%
Sanibel Outlets	19%	19%
Miromar Outlets Mall	20%	14%
J.N. Ding Darling National Wildlife Refuge	12%	13%
Edison & Ford Winter Estates	24%	12%
Shell Factory and Nature Park	7%	11%
Periwinkle Place	11%	10%
Coconut Point Mall	8%	8%
Gulf Coast Town Center	8%	8%
Manatee Park	3%	8%
Bell Tower Shops	7%	7%
Bailey-Matthews Shell Museum	2%	3%
Broadway Palm Dinner Theater	2%	2%
Barbara B. Mann Performing Arts Hall	1%	2%
None	15%	7%

[1]Multiple responses permitted.

Trip Experience

Area stayed	July - Sept 2019	July - Sept 2020
Sanibel Island	26%	24%
Fort Myers Beach	22%	24%
Fort Myers	17%	15%
Cape Coral	18%	15%
Bonita Springs	5%	5%
Estero	3%	4%
Captiva Island	4%	3%
North Fort Myers	2%	3%
Lehigh Acres	1%	2%
Along I-75	1%	1%
Boca Grande/Outer Island	1%	1%
Pine Island	1%	1%

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Trip Experience
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Post-Trip Evaluation

Loyalty metrics	July - Sept 2019	July - Sept 2020
Likely to recommend	91%	94%
Likely to return	91%	94%
Likely to return next year	60%	66%

Satisfaction with Accommodations	July - Sept 2019	July - Sept 2020
Exceeded expectations	41%	43%
Met expectations	56%	55%
Did not meet expectations	3%	2%

Post-Trip Evaluation

Satisfaction with Visit	July - Sept 2019	July - Sept 2020
Very satisfied	69%	64%
Satisfied	26%	32%
Neither	1%	2%
Dissatisfied/Very dissatisfied	1%	1%
Don't know	3%	1%

Satisfaction with Customer Service	July - Sept 2019	July - Sept 2020
Very satisfied	63%	61%
Satisfied	30%	32%
Neither	3%	4%
Dissatisfied/Very dissatisfied	1%	1%
Don't know	3%	2%

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Post-Trip Evaluation

Visitor Concerns[1]	July - Sept 2019	July - Sept 2020
Insects	19%	35%
Traffic	9%	21%
Beach seaweed	19%	20%
Water quality	17%	17%
High prices	8%	14%
Weather	8%	14%
Lack of nightlife	4%	13%
Quality of accommodations	2%	11%
Red Tide	20%	8%
Other	5%	3%
No concerns	33%	22%

[1]Multiple responses permitted.

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Methodology

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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: 958 completed interviews
    - Target individuals: July – September visitors to Lee County
    - Data Collection: July 2020 – September 2020
  - Occupancy Study
    - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc., and the STR Report
    - Sample Size – data from 8,121 hotel/rental/campground units (87 properties) reporting to DSG, and 9,828 hotel units reporting to STR (83 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
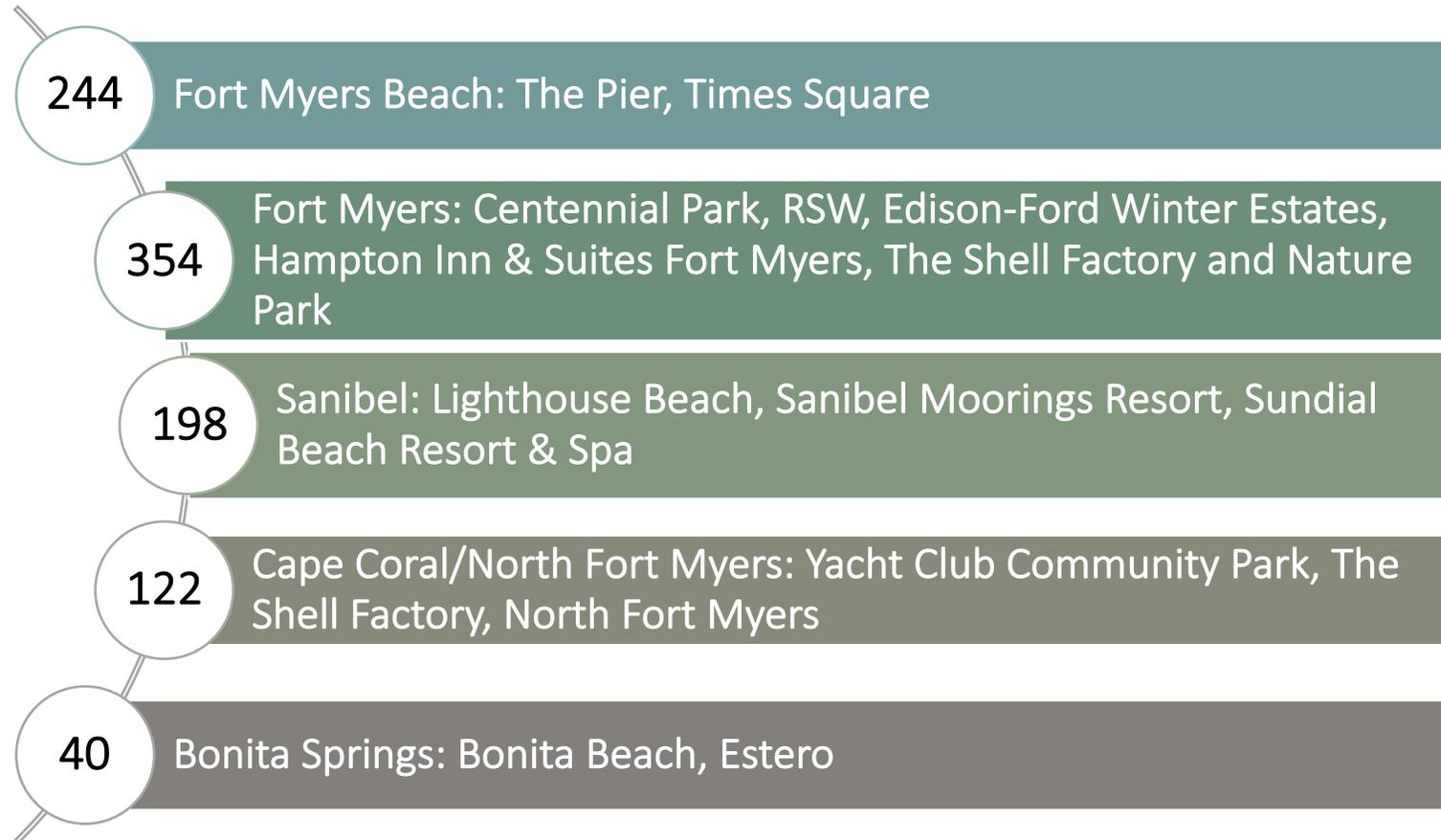
Methodology

- ## Occupancy Study
  - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc.
    - Sample Size – 87 completed interviews
    - Data Collection: October 2020 (for July - September 2020)
  - Total Sample Size – data from 8,121 hotel/rental/campground units reporting to DSG and 9,828 hotel units reporting to STR (representing 83 properties)

Number of Interviews

Category	2020	2019
Hotel/Motel/Resort/B&B	68	38
Condo/Cottage/Vacation Home	14	13
RV Park/Campground	5	6

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Methodology

- **958** visitor interviews were completed in the following areas:

244 — Fort Myers Beach: The Pier, Times Square

354 — Fort Myers: Centennial Park, RSW, Edison-Ford Winter Estates, Hampton Inn & Suites Fort Myers, The Shell Factory and Nature Park

198 — Sanibel: Lighthouse Beach, Sanibel Moorings Resort, Sundial Beach Resort & Spa

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

40 — Bonita Springs: Bonita Beach, Estero

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