The Beaches of Fort Myers & Sanibel

Lee County VCB

Calendar Year 2019
Visitor Tracking, Occupancy & Economic Impact Study

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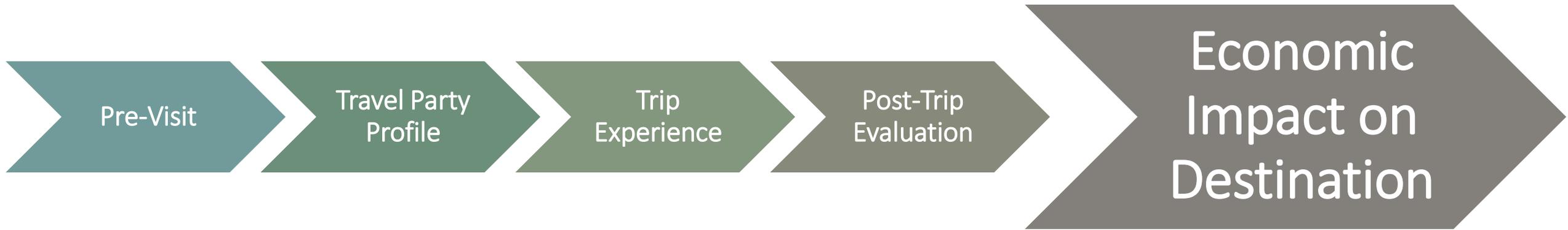Rachael Anglin
Downs & St. Germain Research

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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**

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Direct Spending

Visitors who traveled to The Beaches of Fort Myers & Sanibel in CY 2019 spent

$3,272,030,100

in Lee County on accommodations, restaurants, groceries, transportation, attractions, entertainment, and shopping.

An increase of 5.0%.

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Tourism Matters to Lee County

Visitor spending in CY 2019 generated a total economic impact of

$5,313,776,900

in The Beaches of Fort Myers & Sanibel.

An increase of 5.0%.

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Visitors

The Beaches of Fort Myers & Sanibel attracted

4,926,400

visitors in CY 2019.

An increase of 2.8%.

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Room Nights

The Beaches of Fort Myers & Sanibel visitors generated

5,588,700

room nights in paid accommodations in CY 2019.

An increase of 5.6%.

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Jobs & Wages

Tourism in The Beaches of Fort Myers & Sanibel supported

44,016 (+3.6%)

local jobs in CY 2019, generating

$1,008,286,100 (+4.9%)

in wages and salaries.

Visitors Support Jobs

An additional Lee County job is supported by every

112

visitors

Tourist Development Tax

Paid accommodations and vacation rentals by visitors to The Beaches of Fort Myers & Sanibel in CY 2019 generated

$43,493,514

in TDT collected

An increase of **5.5%.**

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Household Savings[1]

Visitors to The Beaches of Fort Myers & Sanibel save local residents

$678

per household every year in local taxes

Marketing Spending

Every dollar spent by the Lee County VCB on marketing is associated with

$247[1]

in visitor spending within Lee County

[1]The Lee County VCB's marketing budget for FY2019 was $13,253,608.

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Calendar Year Lodging Statistics

65.6%
Occupancy
⬆ 0.6%

$142.83
ADR
⬆ 0.5%

$93.70
RevPAR
⬆ 1.2%

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Economic Impact on Destination
Calendar Year 2019

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Visitor Journey: Pre-Visit

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

Pre-Visit
Calendar Year 2019
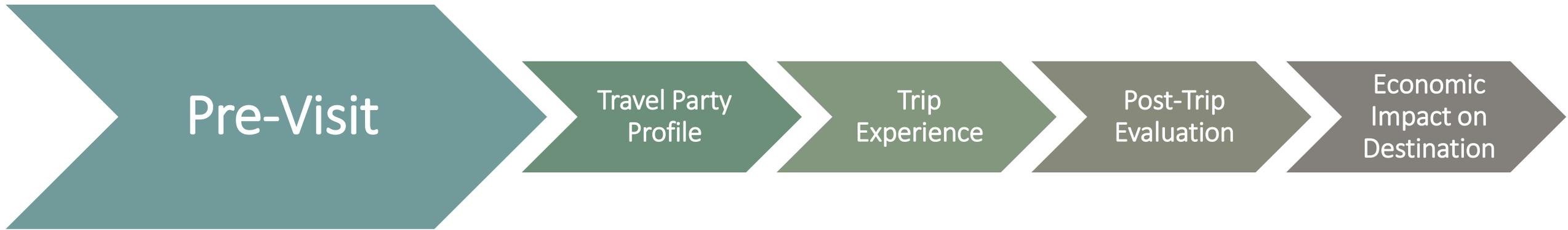
Trip Planning

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

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

→ **15%** of visitors considered choosing other destinations when planning their trips

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Trip Planning: Websites Used

→ **3 in 4** visitors used websites to plan their trip to The Beaches of Fort Myers & Sanibel
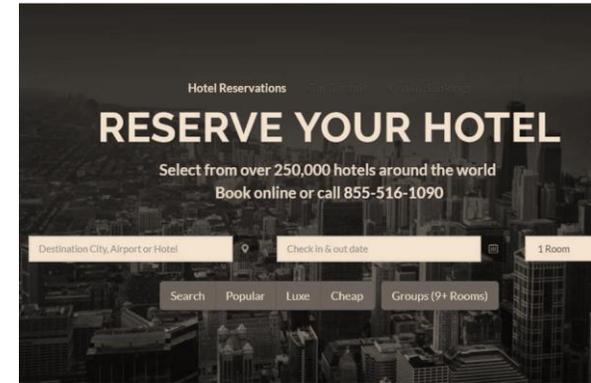
→ Top websites used to plan their trip include[1]:

31% Airline websites   **19% Search engines**   **17% Trip Advisor**   **17% Hotel websites**

[1]Multiple responses permitted.

Top Trip Influencers

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

88% Warm weather

87% Peaceful/relaxing

83% Safe destination

[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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Pre-Visit
Calendar Year 2019

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Top Reasons for Visiting

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

54% Vacation

47% Beach

47% Relax & unwind

27% Visit friends & relatives

[1]Three responses permitted.

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Promotions

→ **32%** of visitors recalled promotions in the past 6 months for The Beaches of Fort Myers & Sanibel

→ Top sources of recall include[1]:

36% Internet

30% TV

29% Social media

[1]Multiple responses permitted.

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Booking

→Visitors used the following to book their trips:

44% Directly with hotel

15% Online travel agency

14% VRBO, HomeAway

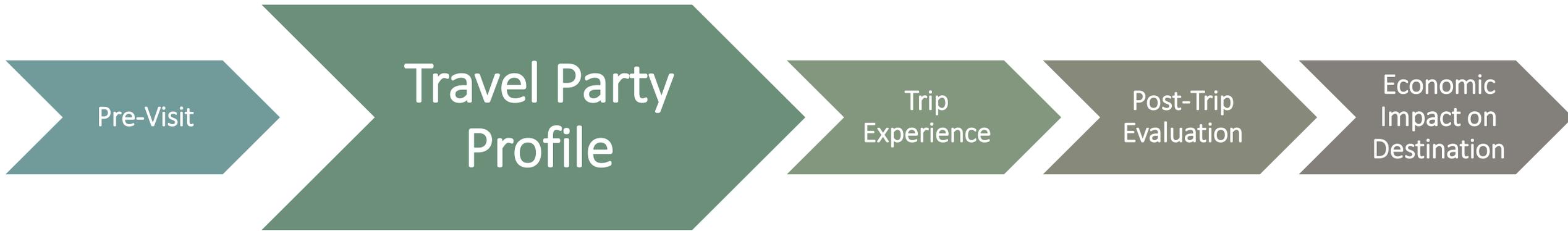10% Vacation rental company

8% Airbnb

Transportation
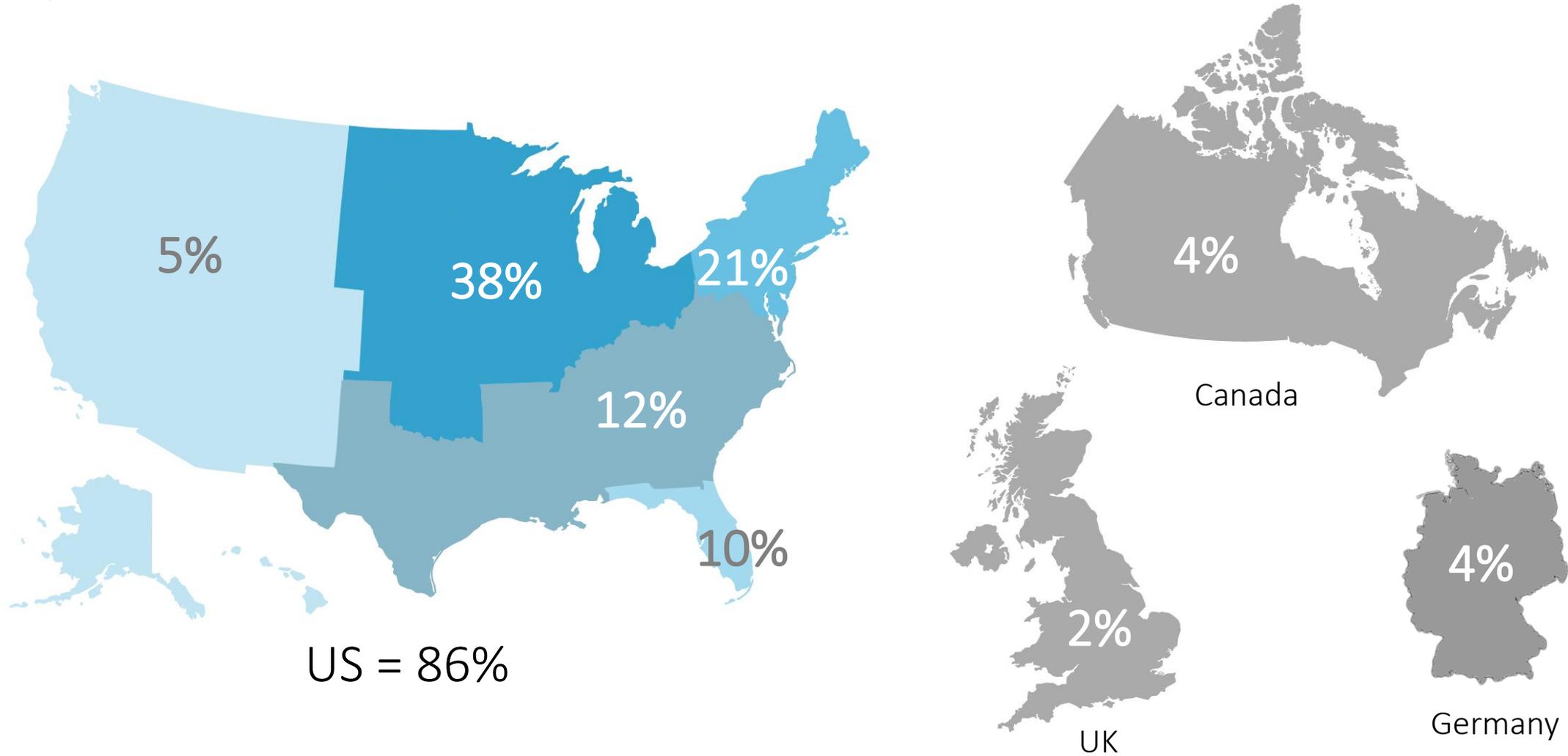
→ **66%** of visitors flew to The Beaches of Fort Myers & Sanibel

→ **72%** of visitors who flew to The Beaches of Fort Myers & Sanibel flew to RSW

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Pre-Visit
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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
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Origin

5%

38%

21%

12%

10%

US = 86%

4%

Canada

2%

UK

4%

Germany

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Travel Party Profile
Calendar Year 2019

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Top Origin Markets

5% New York City

5% Chicago

5% Minneapolis

4% Cincinnati

3% Boston

3% Indianapolis

3% Miami-Ft. Lauderdale

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Travel Party Profile
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Travel Party Size and Composition

→Visitors traveled in a party composed of **3.1 people**[1]

→**27%** traveled with children under the age of 18

→**42%** traveled as a couple, while **36%** of visitors traveled as a family

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

Visitor Journey: Trip Experience

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

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Trip Experience
Calendar Year 2019

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Accommodations

32% Hotel/Motel/Resort/B&B

31% Condo/Vacation Rental

31% Non-paid Accommodations

4% Day trippers

2% RV Park/Campground

Trip Experience
Calendar Year 2019

Length of Stay & Number of Times in Destination

→ Visitors[1] spent **9.9 nights** in The Beaches of Fort Myers & Sanibel

→ **23%** were first time visitors

→ **29%** have visited more than 10 times

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

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Trip Experience
Calendar Year 2019

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Visitor Activities

→Top visitor activities include[1]:

74% Beaches

68% 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	47%[1]	Beaches	74%[2]
	47%	Relax & unwind	68%
	27%	Visiting friends/relatives	33%
	10%	Nature	32%
Trip Enhancements	6%	Fishing	13%
	4%	Biking, hiking etc.	19%
	4%	Sporting event	7%
	4%	Special occasion	4%
	4%	Shopping	44%
	4%	Attractions	19%
	3%	Golf or tennis	13%
	3%	Water sports	19%
	2%	Photography	15%
	2%	Culture	8%
	2%	Special event	8%
	2%	Business	2%
	2%	Guided tours	6%
	2%	Museums, history, etc.	8%
	1%	Diving/snorkeling	3%
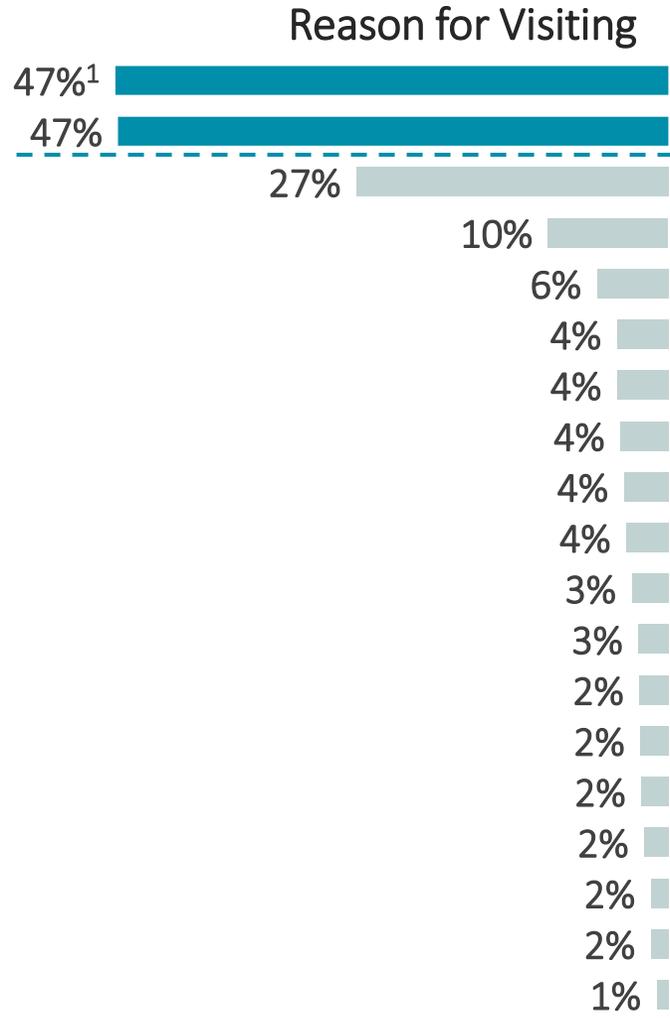
[1]Three responses permitted.
[2]Multiple responses permitted.

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Travel Party Profile
Calendar Year 2019

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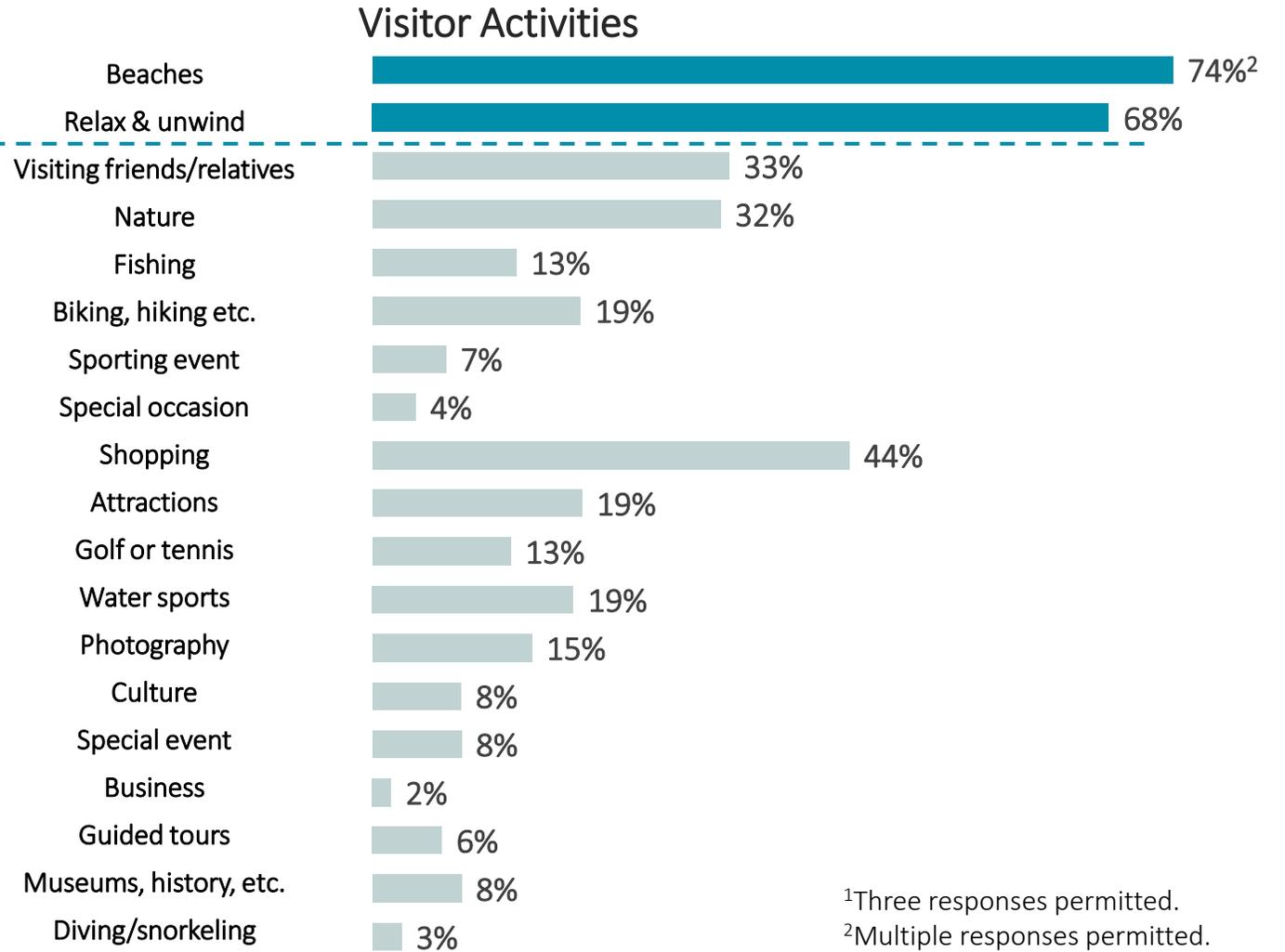
Top Attractions Visited[1]

75% Beaches

35% Fort Myers Beach Pier   **30%** Sanibel Lighthouse   **24%** Edison & Ford Winter Estates

20% Miromar Outlets   **19%** Sanibel Outlets

[1]Multiple responses permitted.

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Trip Experience
Calendar Year 2019

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Top Communities Stayed

22% Fort Myers

21% Sanibel Island

20% Fort Myers Beach

16% 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

Satisfaction

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

→ **92%** of visitors are likely to return

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

→ **38%** of visitors said paid accommodations "Far Exceeded" or "Exceeded" their expectations

Satisfaction

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

→**92%** 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]:


97% Warm weather

96% Peaceful/relaxing

95% 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

→ **3 in 10** visitors were concerned about traffic in The Beaches of Fort Myers & Sanibel

→ **18%** were concerned about Red Tide

→ **29%** of visitors had no concerns about the destination
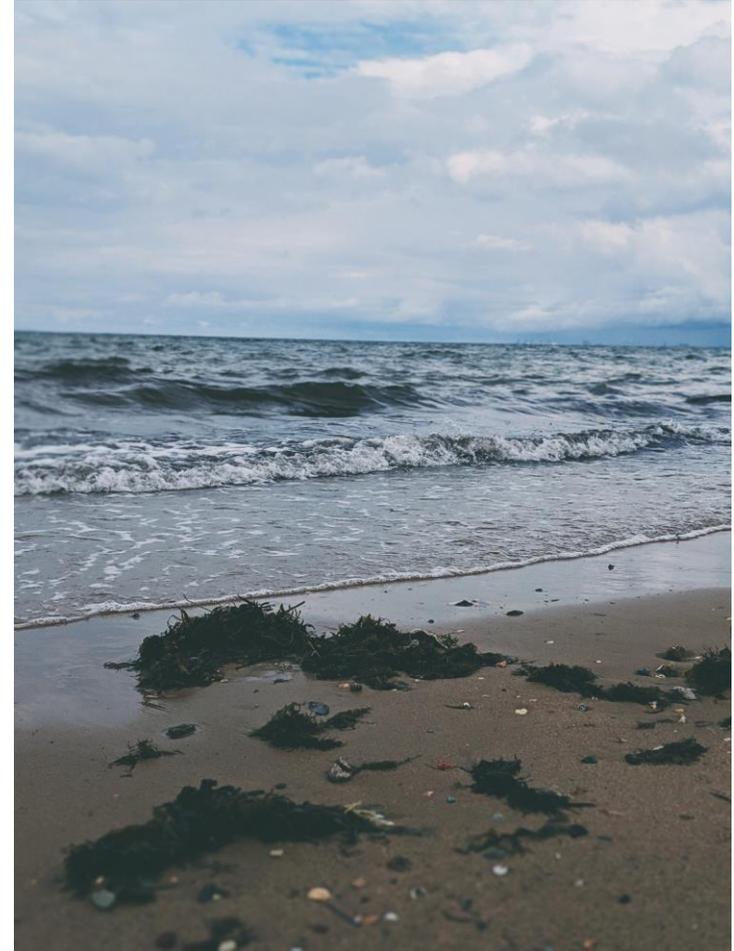
Area Descriptions

"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 Place to Visit

"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

"Very laid back, great beach, shelling, sea creatures. Soul renewing!"

Relaxing & Peaceful

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Post-Trip Evaluation
Calendar Year 2019

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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

Economic Impact on Destination
Calendar Year 2019
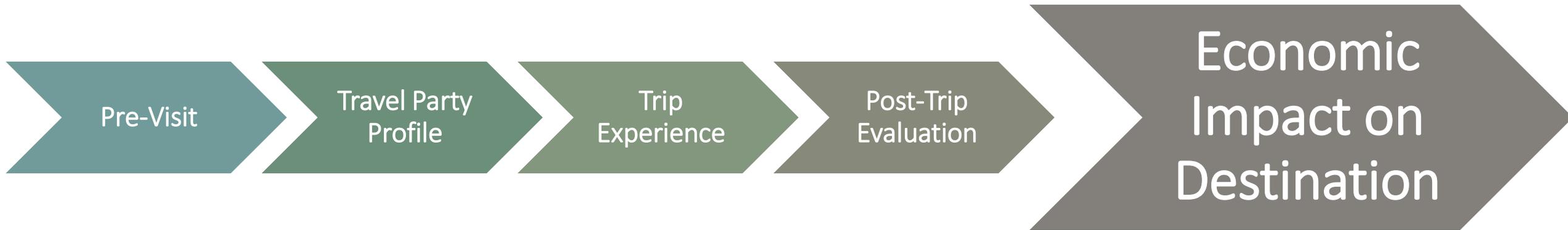
Tourism Snapshot: Calendar Year 2019[1]

Visitor & Lodging Statistics	2018	2019	% Change
Visitors	4,793,800	4,926,400	+2.8%
Room Nights	5,290,750	5,588,700	+5.6%
Direct Expenditures[2]	$3,116,791,500	$3,272,030,100	+5.0%
Total Economic Impact[3]	$5,061,669,400	$5,313,776,900	+5.0%

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

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

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

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Economic Impact on Destination
Calendar Year 2019

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5 Year Trend: Visitation

Visitation (In Millions)

■ All Visitors   ■ Visitors in Paid Accommodations

	2015	2016	2017	2018	2019
All Visitors	4.92	4.81	4.80	4.79	4.93
Visitors in Paid Accommodations	3.02	3.01	3.03	3.04	3.14

Visitation: +0.2%
Paid Visitation: +4.0%

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Calendar Year 2019

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5 Year Trend: Visitor Spending

Expenditures (In Billions)

■ All visitors ■ Visitors in Paid Accommodations

	2015	2016	2017	2018	2019
All visitors	$3.00	$3.04	$3.09	$3.12	$3.27
Visitors in Paid Accommodations	$2.10	$2.16	$2.22	$2.24	$2.21

Expenditures: +9.0%
Paid Expenditures: +5.2%

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Calendar Year 2019

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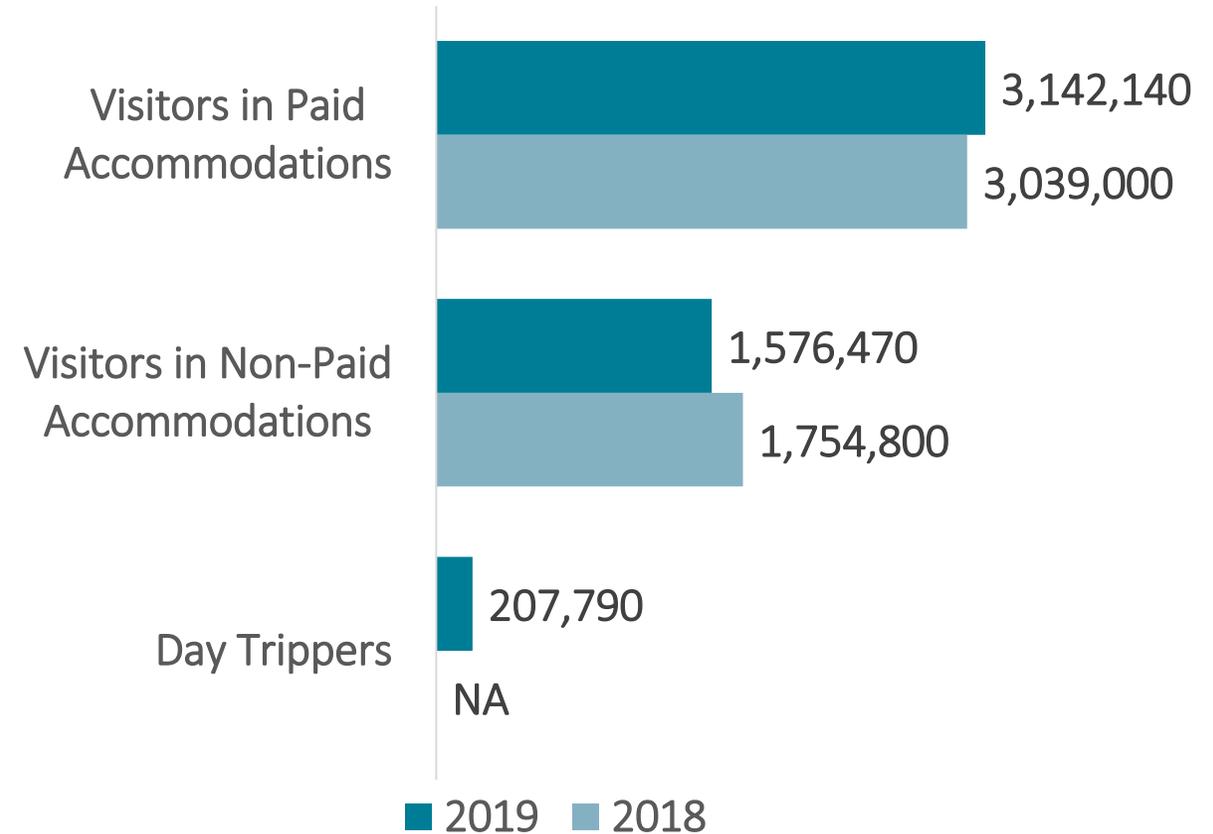R E S E A R C H
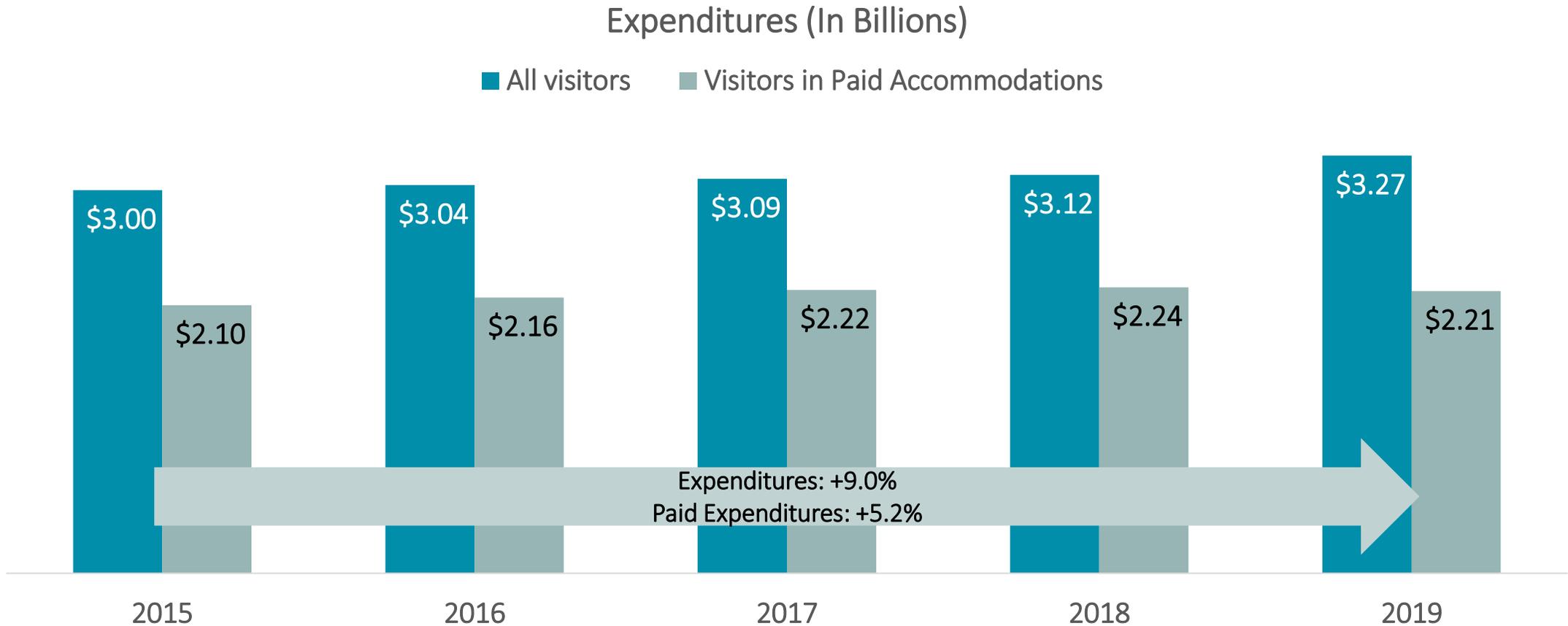
Number of Visitors

There were **4,926,400**[1] visitors to The Beaches of Fort Myers & Sanibel in 2019 (+2.8% from 2018).

Visitors in Paid Accommodations
- 2019: 3,142,140
- 2018: 3,039,000

Visitors in Non-Paid Accommodations
- 2019: 1,576,470
- 2018: 1,754,800

Day Trippers
- 2019: 207,790
- 2018: NA

■ 2019 ■ 2018

[1]Sources: Visitor Tracking Study & Occupancy Survey

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Economic Impact on Destination
Calendar Year 2019

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Visitor Type

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

Visitors in Paid Accommodations: 64% / 63%

Visitors in Non-Paid Accommodations: 32% / 37%

Day Trippers: 4% / NA

2019 2018

Economic Impact on Destination
Calendar Year 2019
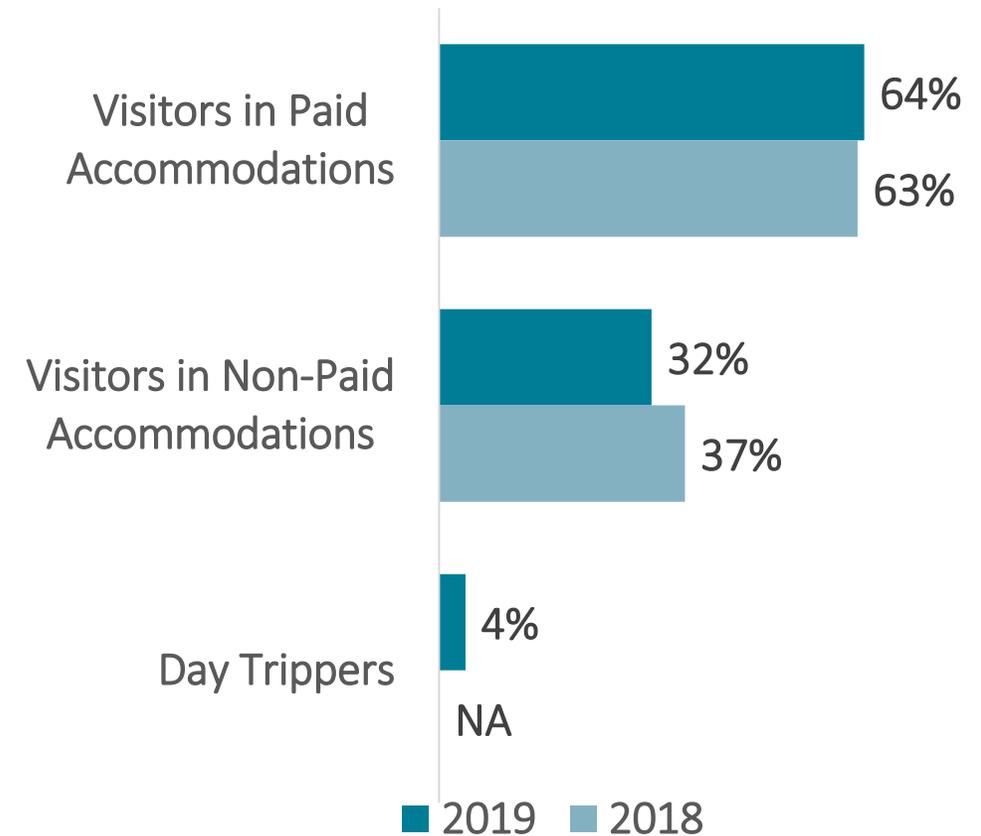
Visitor Expenditures by Visitor Type

2019 visitors spent **$3,272,030,100** in The Beaches of Fort Myers & Sanibel, resulting in a total economic impact of **$5,313,776,900**, up 5.0% from 2018.

Direct Spending

Visitors in Paid Accommodations
- $2,207,352,100
- $2,239,802,800

Visitors in Non-Paid Accommodations
- $1,047,798,800
- $876,988,700

Day Trippers
- $16,879,200
- NA

■ 2019 ■ 2018

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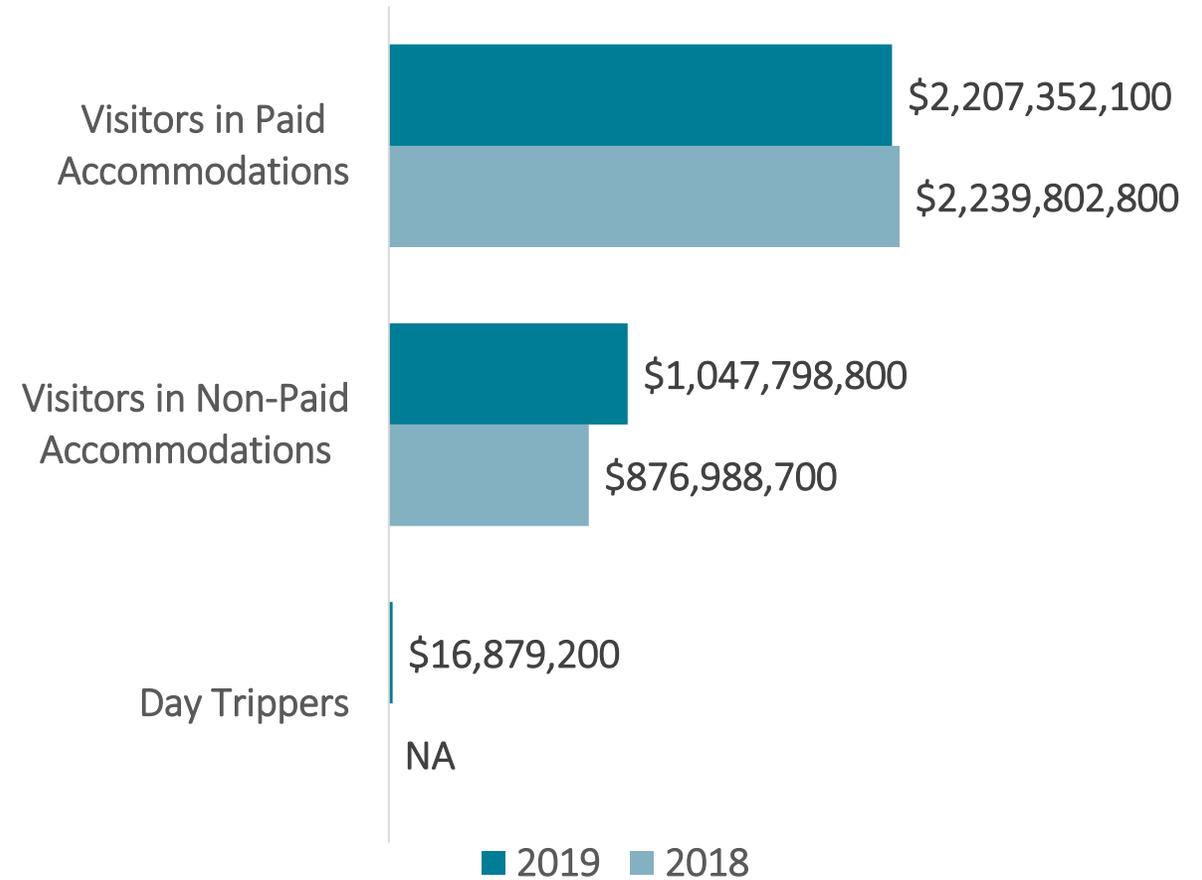
Visitor Expenditures by Spending Category
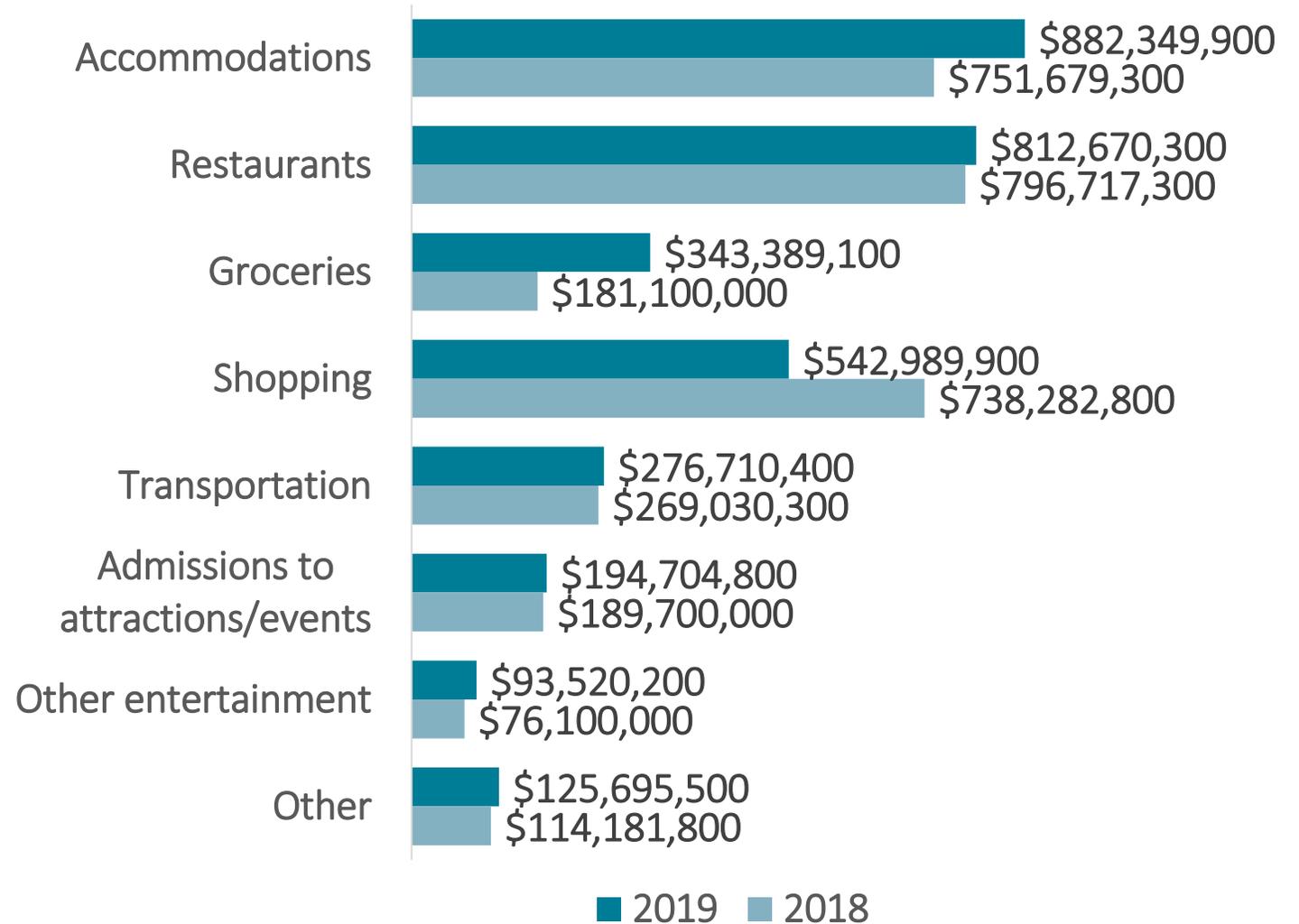
2019 visitors spent **$3,272,030,100** in The Beaches of Fort Myers & Sanibel, resulting in a total economic impact of **$5,313,776,900**.

Accommodations
$882,349,900
$751,679,300

Restaurants
$812,670,300
$796,717,300

Groceries
$343,389,100
$181,100,000

Shopping
$542,989,900
$738,282,800

Transportation
$276,710,400
$269,030,300

Admissions to attractions/events
$194,704,800
$189,700,000

Other entertainment
$93,520,200
$76,100,000

Other
$125,695,500
$114,181,800

■ 2019 ■ 2018

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Calendar Year 2019

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Visitor Expenditures by Lodging Type

2019 visitors staying in paid accommodations spent **$2,193,132,700** in The Beaches of Fort Myers & Sanibel.

Hotel/Motel/Resort/B&B
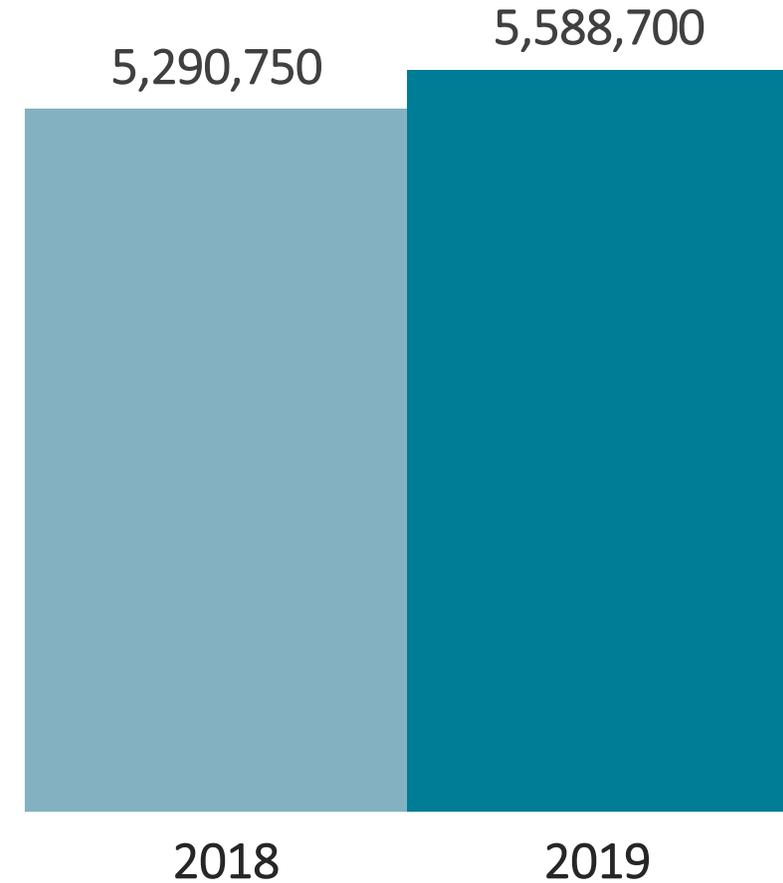- $1,227,939,200
- $1,240,408,000

Condo/Cottage/Vacation Home
- $625,246,600
- $641,235,300

RV Park/Campground
- $339,946,900
- $358,159,400

■ 2019 ■ 2018

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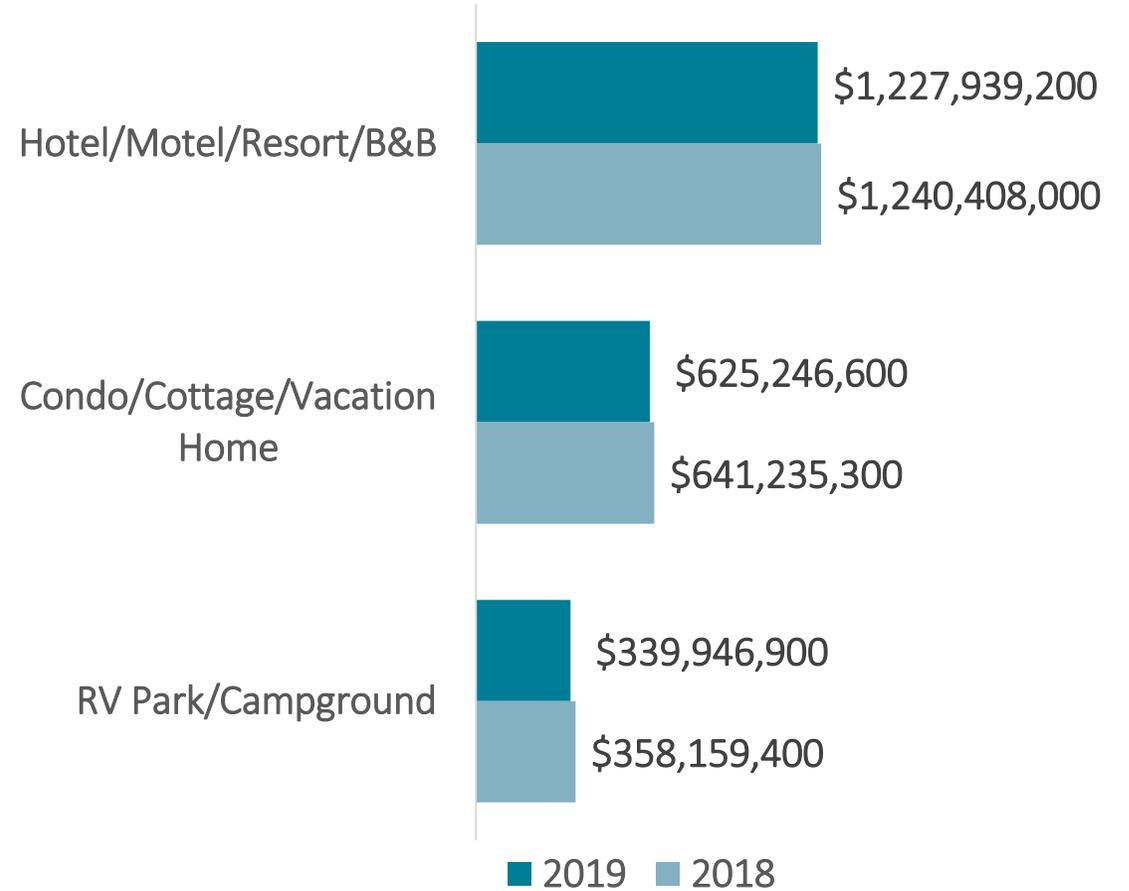
Room Nights Generated
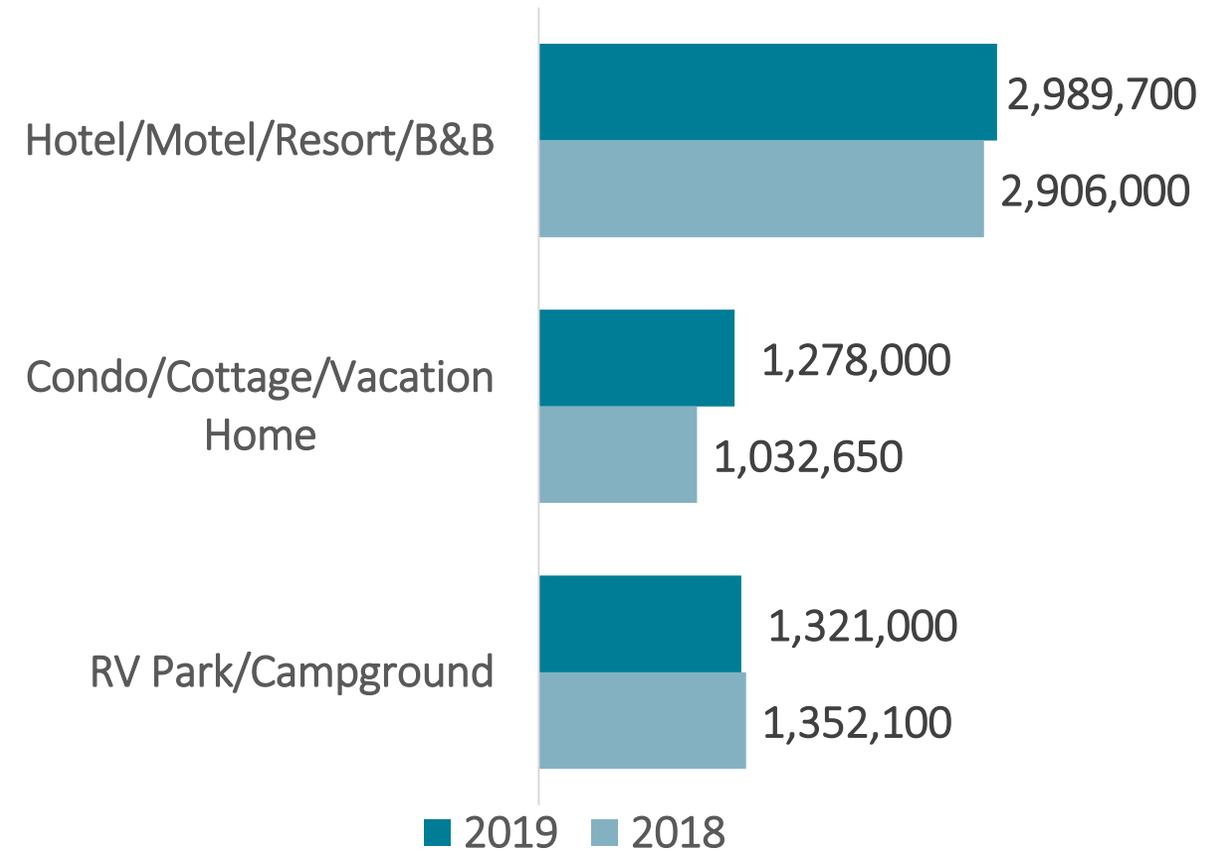
2019 visitors spent **5,588,700**[1] nights in The Beaches of Fort Myers & Sanibel hotels, resorts, condos, rental houses, etc. (+5.6% from 2018).

5,290,750

5,588,700

2018

2019

[1]Source: Occupancy Survey

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Economic Impact on Destination
Calendar Year 2019

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Room Nights Generated

Motels, hotels, etc. accounted for over **1 in 2** nights in The Beaches of Fort Myers & Sanibel, while vacation rentals accounted for nearly **1 in 4** nights visitors spent in the area.

Hotel/Motel/Resort/B&B
- 2,989,700
- 2,906,000

Condo/Cottage/Vacation Home
- 1,278,000
- 1,032,650

RV Park/Campground
- 1,321,000
- 1,352,100

■ 2019 ■ 2018

[1]Source: Occupancy Survey

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Economic Impact on Destination
Calendar Year 2019

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Available Room Nights

There were **8,684,047**[1] available room nights in 2019 vs. 8,121,464 in 2018 (+6.9%).

Hotel/Motel/Resort/B&B
- 4,343,077
- 4,187,735

Condo/Cottage/Vacation Home
- 2,063,458
- 1,658,300

RV Park/Campground
- 2,277,512
- 2,275,429

■ 2019 ■ 2018

[1]Source: Occupancy Survey

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Economic Impact on Destination
Calendar Year 2019

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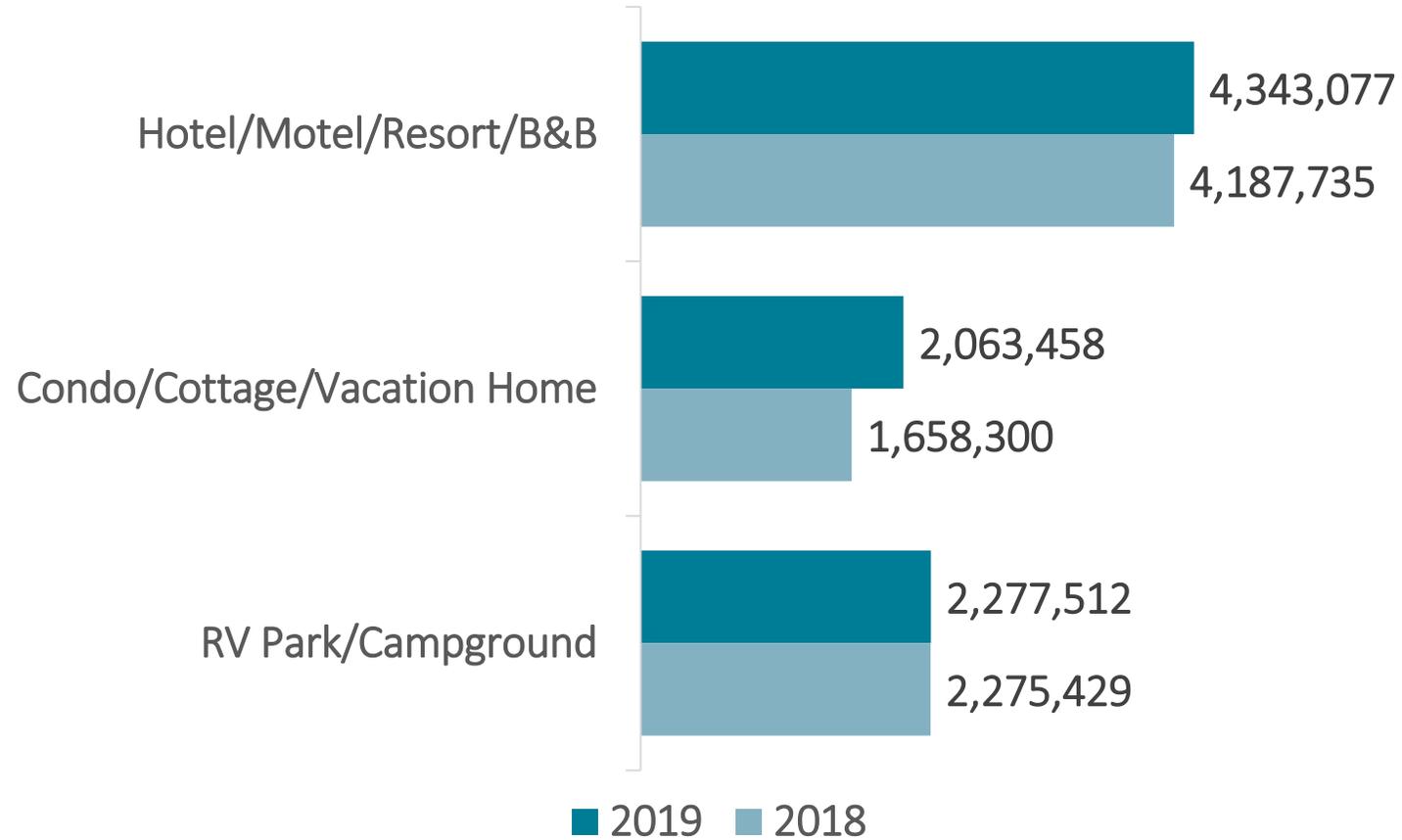
5 Year Trend: Available & Occupied Room Nights

Room Nights (In Millions)

- Available Room Nights
- Occupied Room Nights

	2015	2016	2017	2018	2019
Available Room Nights	7.29	7.57	7.62	8.12	8.68
Occupied Room Nights	4.89	4.99	5.15	5.29	5.59

Available Room Nights: +19.1%
Occupied Room Nights: +14.3%

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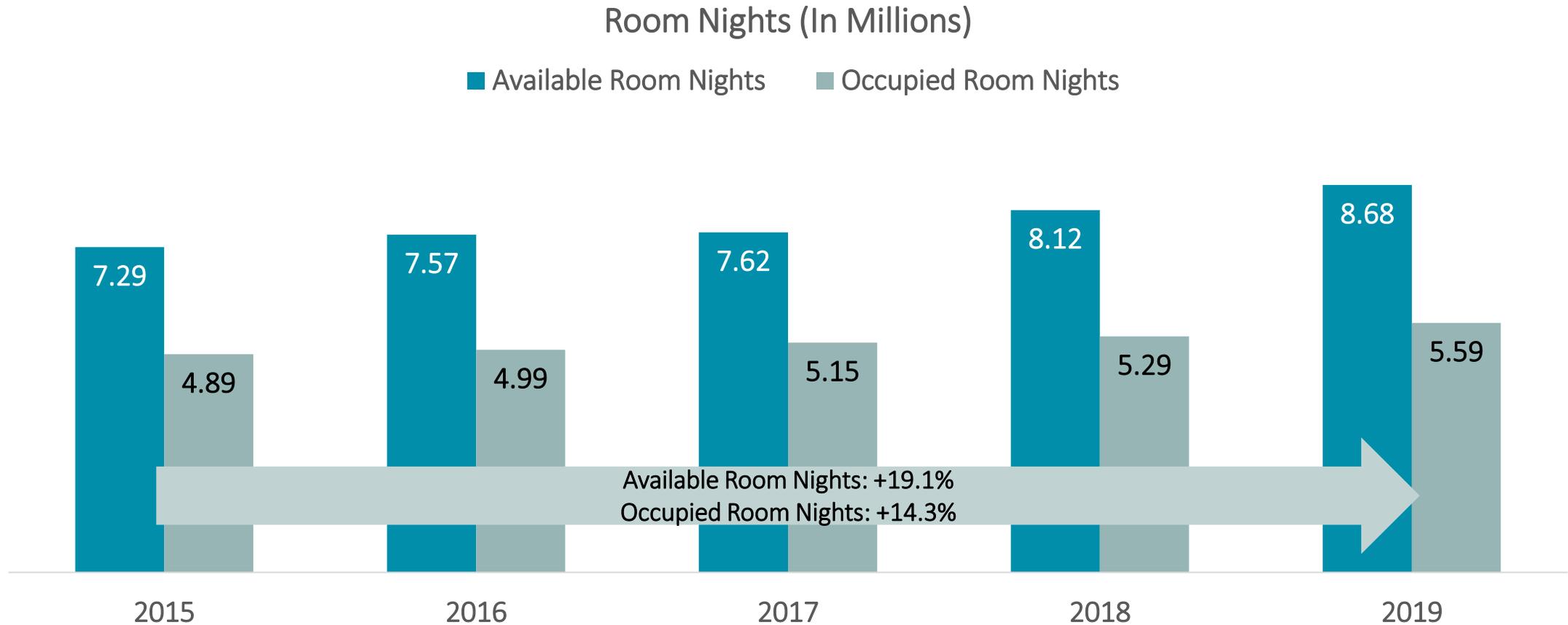
Occupancy, ADR and RevPAR

Occupancy (+0.6%)[1]

65.2% 65.6%

2018 2019

ADR (+0.5%)[1]

$142.07 $142.83

2018 2019

RevPAR (+1.2%)[1]

$92.63 $93.70

2018 2019
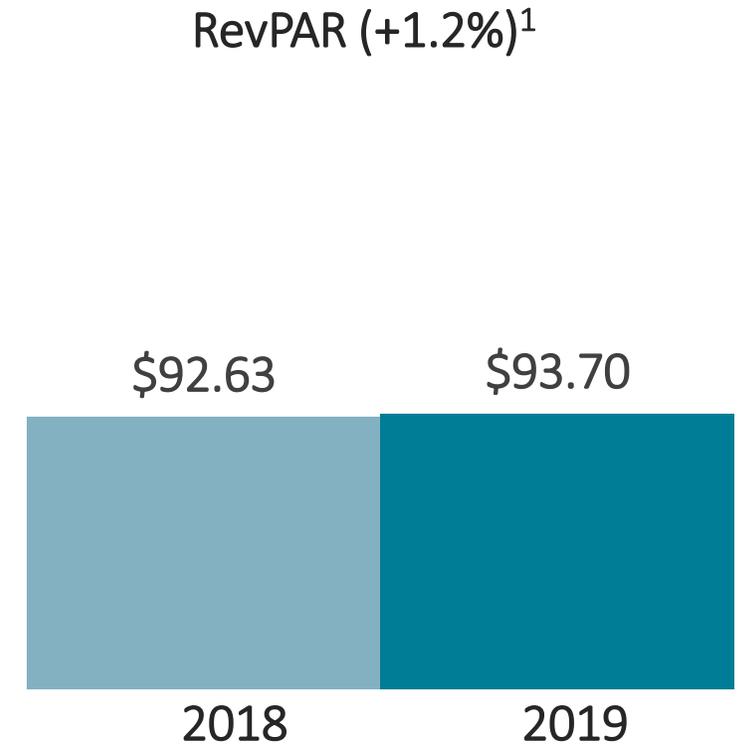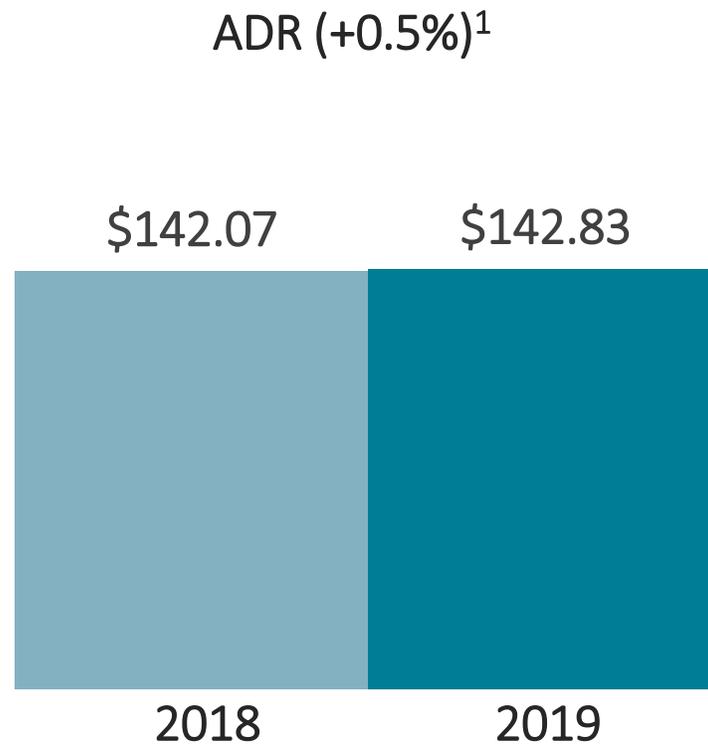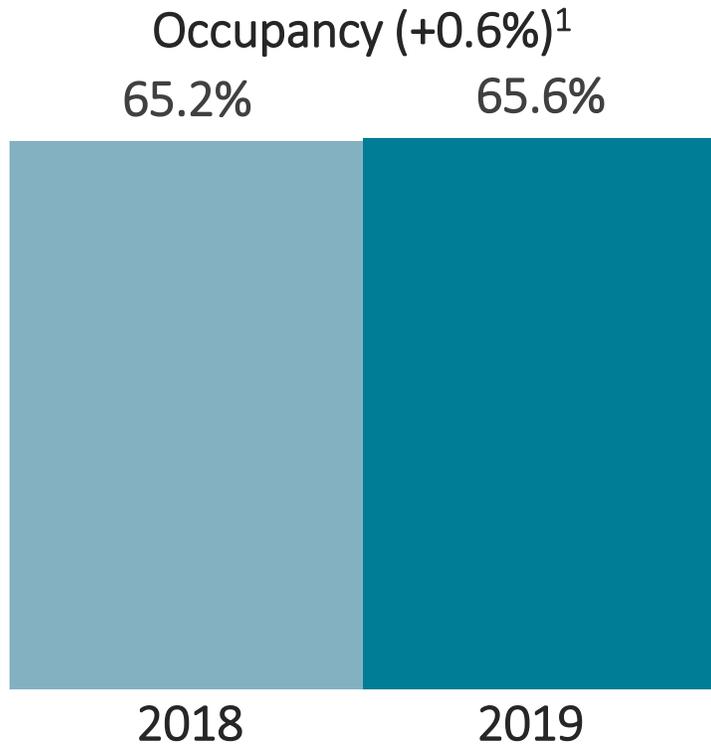
[1]Source: Occupancy Survey

Occupancy

Average occupancy in 2019 was **65.6%**[1] (65.2% in 2018).

Hotel/Motel/Resort/B&B
- 70.2%
- 69.4%

Condo/Cottage/Vacation Home
- 65.6%
- 62.3%

RV Park/Campground
- 60.2%
- 59.4%

■ 2019 ■ 2018

[1]Source: Occupancy Survey

THE BEACHES OF
FORT MYERS
AND SANIBEL

Economic Impact on Destination
Calendar Year 2019

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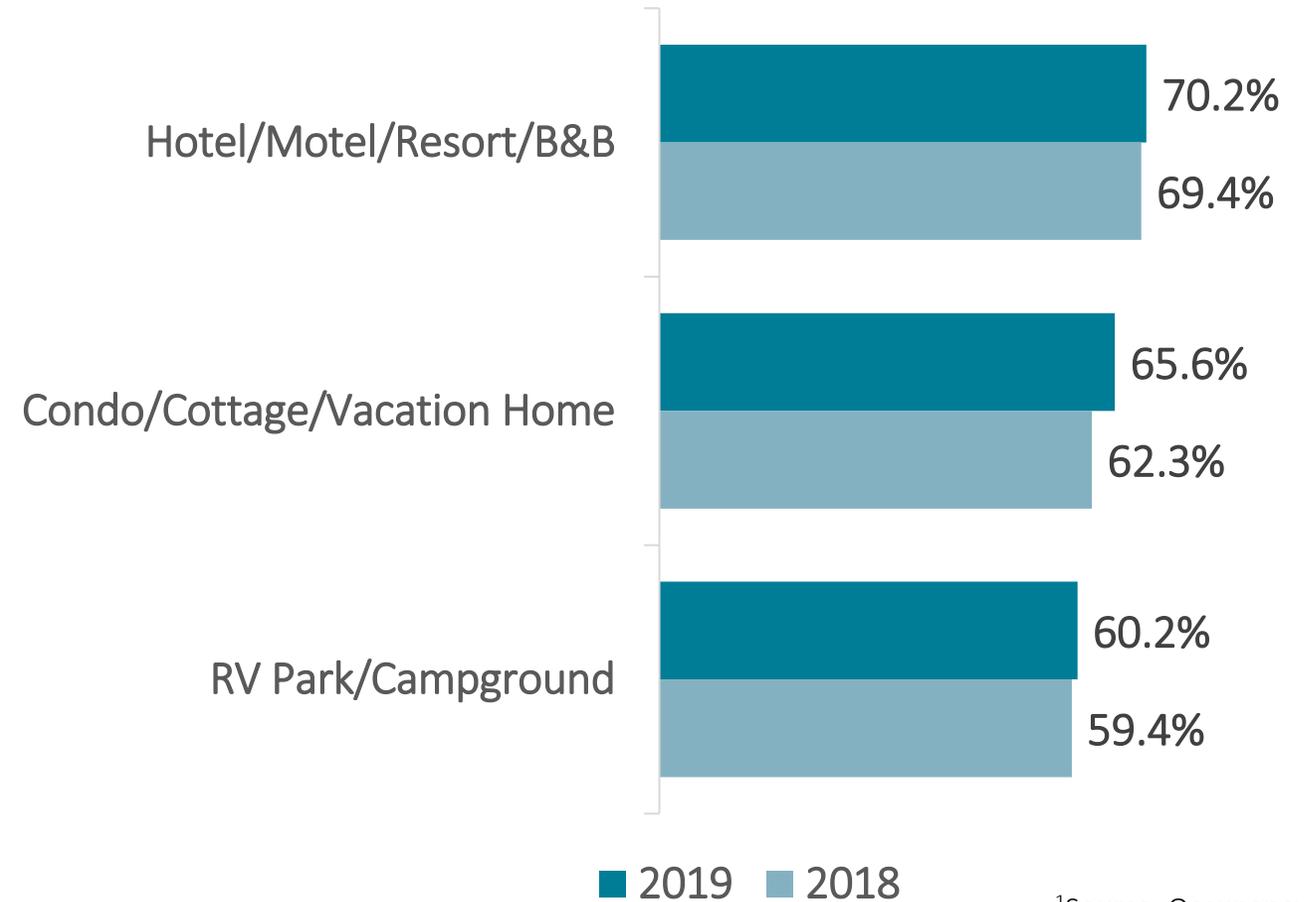
ADR

ADR in 2019 was **$142.83**[1] ($142.07 in 2018).

Hotel/Motel/Resort/B&B
- $158.05 (2019)
- $159.16 (2018)

Condo/Cottage/Vacation Home
- $207.04 (2019)
- $208.47 (2018)

RV Park/Campground
- $59.94 (2019)
- $54.64 (2018)

■ 2019 ■ 2018

[1]Source: Occupancy Survey

THE BEACHES OF **FORT MYERS AND SANIBEL**

Economic Impact on Destination
Calendar Year 2019

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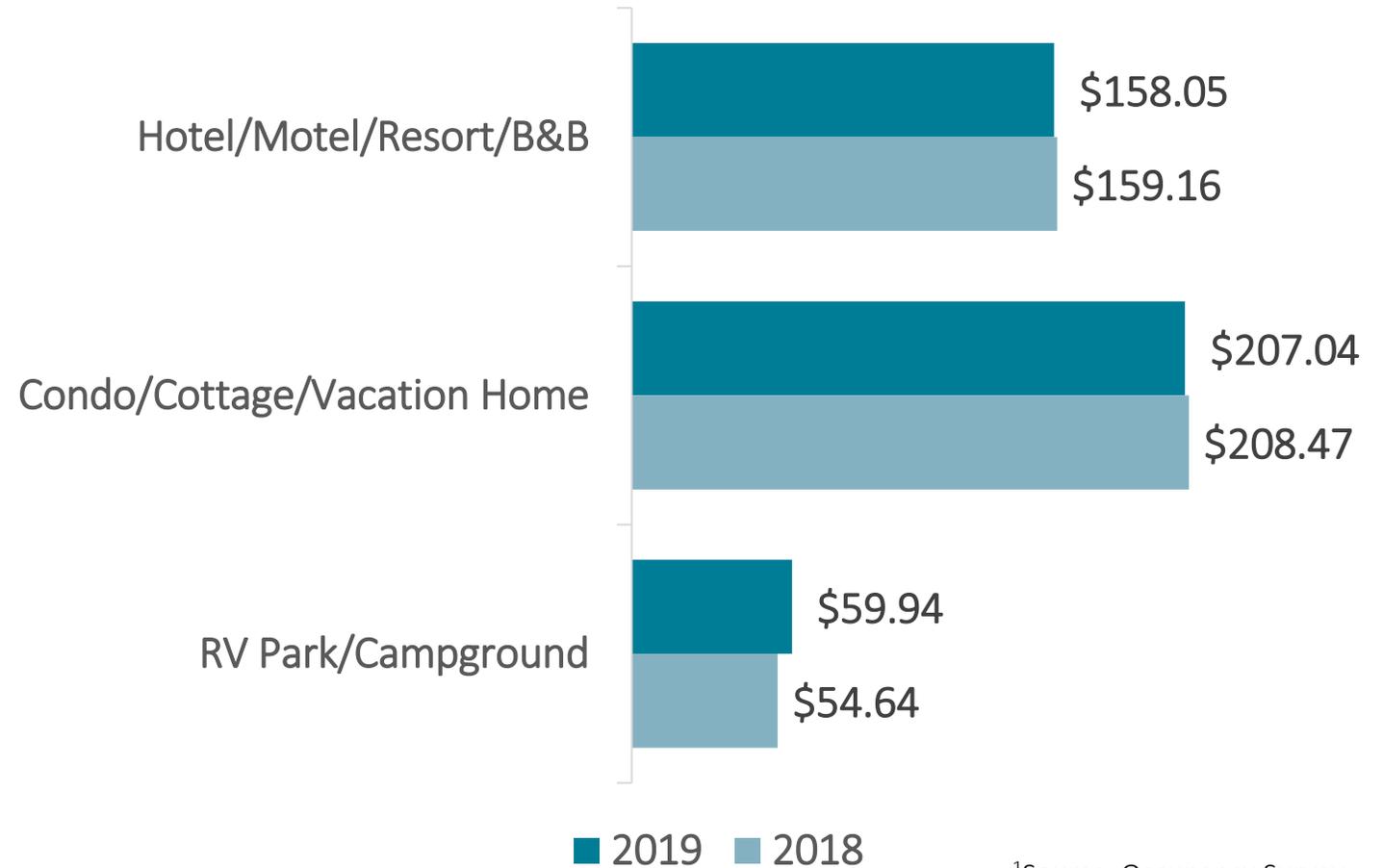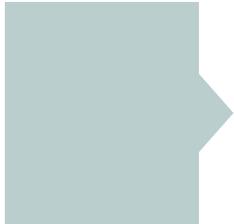
RevPAR

Average RevPAR in 2019 was **$93.70**[1] ($92.63 in 2018).

Hotel/Motel/Resort/B&B
- $93.05 (2019)
- $86.68 (2018)

Condo/Cottage/Vacation Home
- $123.70 (2019)
- $102.52 (2018)

RV Park/Campground
- $45.76 (2019)
- $36.51 (2018)

■ 2019 ■ 2018

[1]Source: Occupancy Survey

THE BEACHES OF
FORT MYERS
AND SANIBEL

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5 Year Trend: Occupancy

67.1% 66.0% 67.6% 65.2% 65.6%

-2.2%

2015   2016   2017   2018   2019

Calendar Year 2019

5 Year Trend: ADR

$144.68 $146.47 $146.07 $142.07 $142.83

-1.3%

2015   2016   2017   2018   2019

THE BEACHES OF
FORT MYERS
AND SANIBEL

Calendar Year 2019

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5 Year Trend: RevPAR

2015	2016	2017	2018	2019
$97.08	$96.67	$98.74	$92.63	$93.70

-3.5%

Calendar Year 2019

Travel Party Size

For visitors in paid accommodations, average travel party size in 2019 was **2.8 people**[1] (2.7 people in 2018).

Hotel/Motel/Resort/B&B
- 2019: 2.5
- 2018: 2.4

Condo/Cottage/Vacation Home
- 2019: 4.0
- 2018: 4.1

RV Park/Campground
- 2019: 2.3
- 2018: 2.2

■ 2019 ■ 2018

[1]Source: Occupancy Survey

THE BEACHES OF FORT MYERS AND SANIBEL

Economic Impact on Destination
Calendar Year 2019

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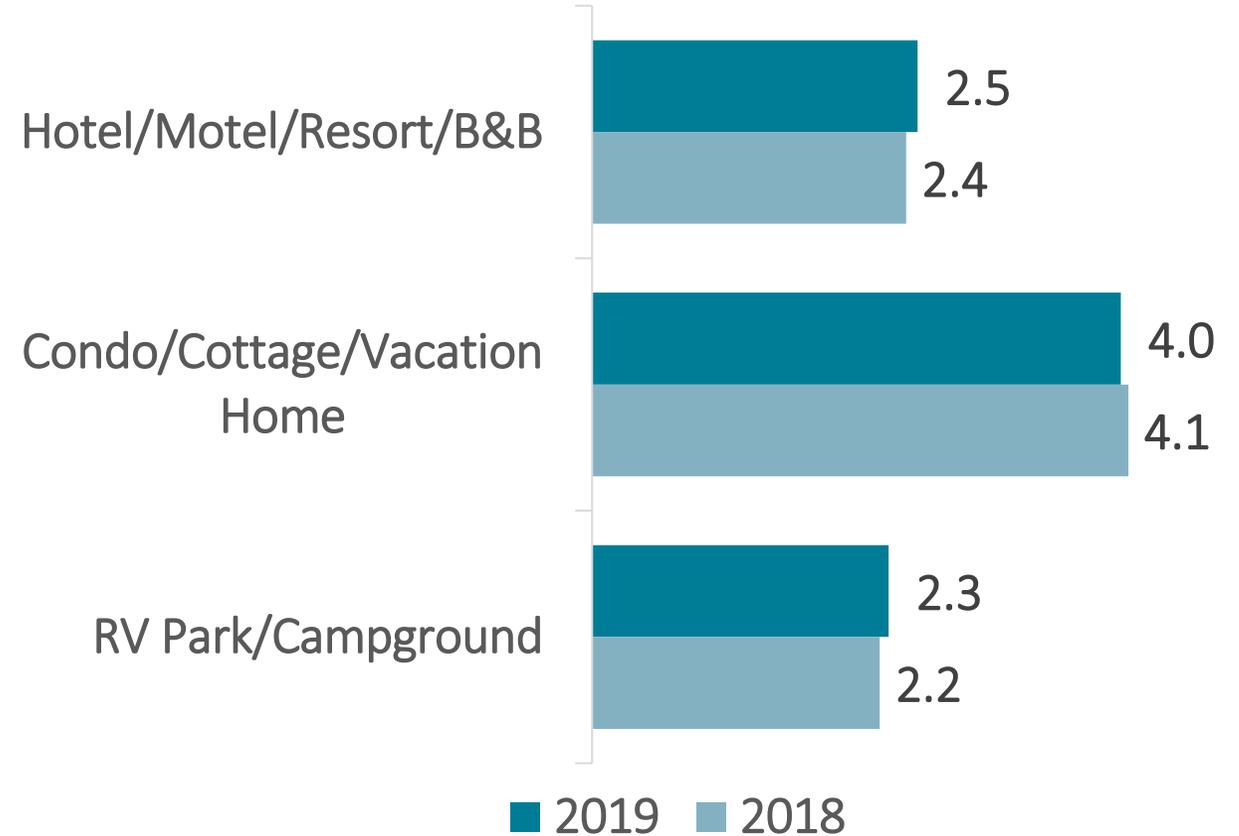
Length of Stay

For visitors in paid accommodations, average length of stay in 2019 was **5.1 nights**[1] (4.7 nights in 2018).

Hotel/Motel/Resort/B&B
3.2
3.0

Condo/Cottage/Vacation Home
8.9
7.9

RV Park/Campground
17.9
18.1

■ 2019 ■ 2018

[1]Source: Occupancy Survey

Economic Impact on Destination
Calendar Year 2019

THE BEACHES OF FORT MYERS AND SANIBEL

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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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FORT MYERS
AND SANIBEL

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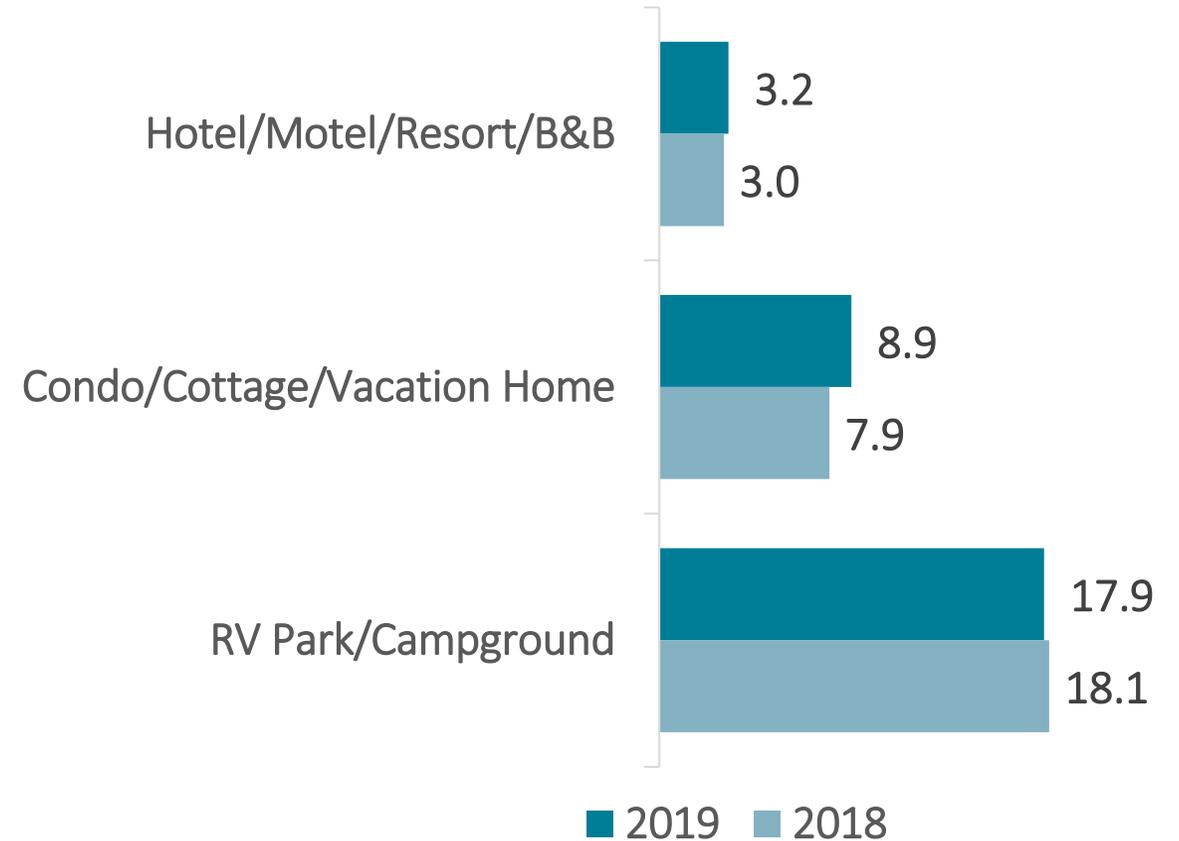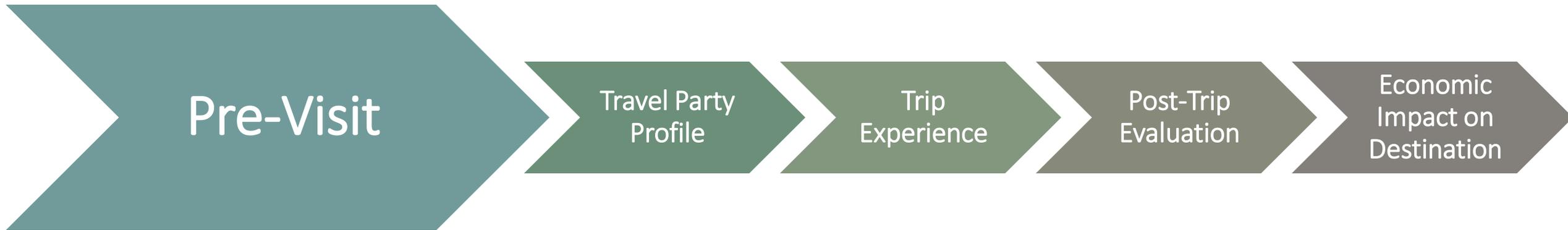
Trip Planning Cycle

6 in 10 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	7%
2-4 weeks	9%
1-2 months	20%
3-6 months	30%
6 months or more	30%
Not sure	4%

Pre-Visit
Calendar Year 2019

Trip Planning: Websites Used

3 in 4 visitors used websites to plan their trip to The Beaches of Fort Myers & Sanibel.

Website	Percentage
Airline websites	31%[1]
Search engines	19%
Trip Advisor	17%
Hotel websites	17%
Online travel agency	16%
Airbnb, VRBO, Homeaway	14%
Vacation rental websites	11%
www.FortMyers-Sanibel.com	6%
Facebook	6%
Visit Florida	6%
Beaches of Fort Myers & Sanibel Social Media	5%
Travel reviews, blogs, stories, etc.	4%
Instagram	2%
Youtube, Hulu, Pandora	2%
Other	7%
None/Don't visit websites	24%

[1]Multiple responses permitted.

THE BEACHES OF FORT MYERS AND SANIBEL

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R E S E A R C H

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]

Visitor guide — 3%

Call local Chamber of Commerce — 2%

Fort Myers-Sanibel E-newsletter — 1%

Call VCB — 1%

Other — 6%

None/Did not request info — 81%

[1]Multiple responses permitted.

THE BEACHES OF FORT MYERS AND SANIBEL

Pre-Visit
Calendar Year 2019

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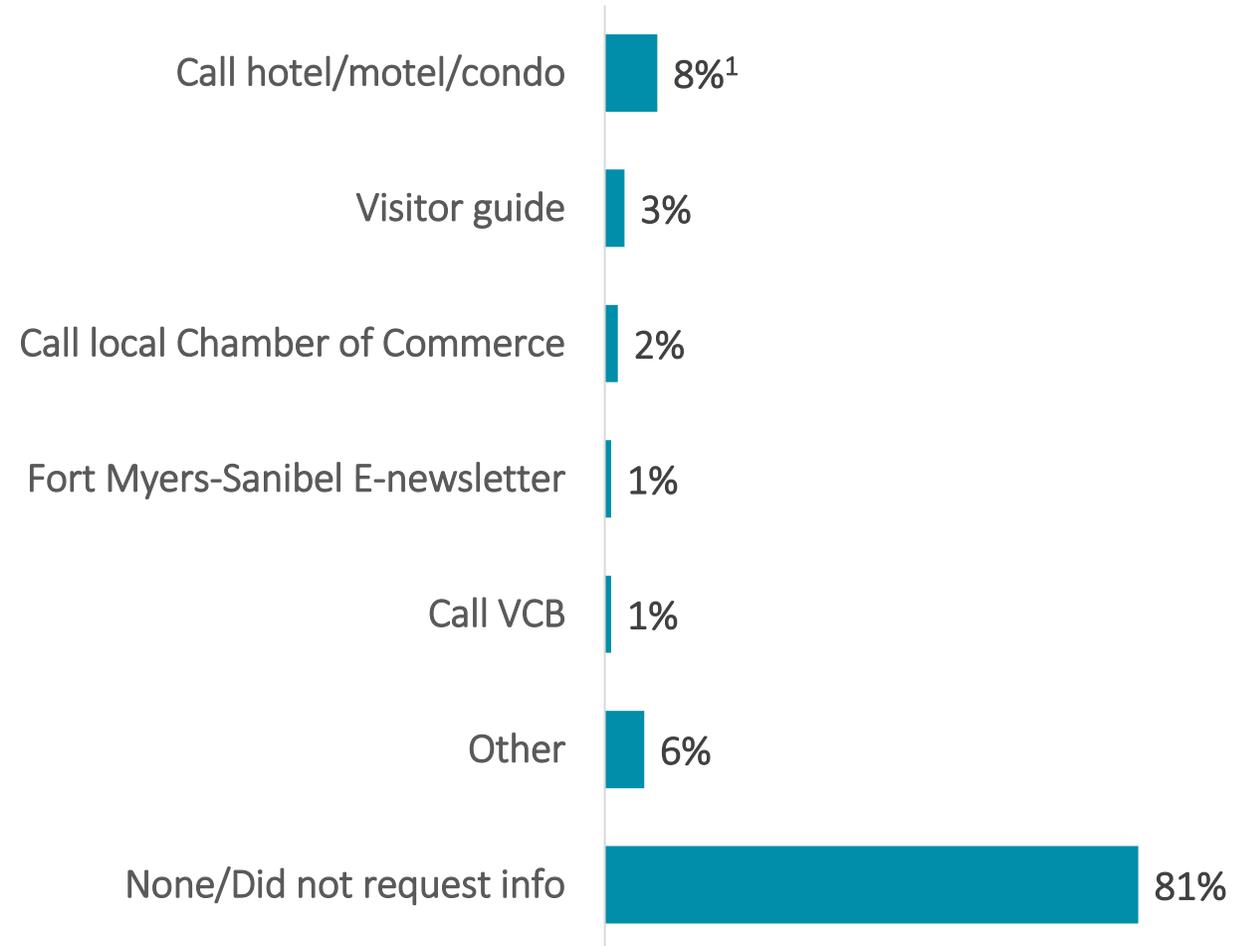
Trip Planning: Other destinations considered

15% of visitors considered choosing other destinations when planning their trips.

Destination	Percentage
Keys/Key West	11%
Naples	10%
Orlando	9%
Miami	9%
Tampa-Clearwater-St. Pete	8%
Marco Island	7%
Ft. Lauderdale	6%
Siesta Key	4%
Caribbean	2%
Sarasota	2%
Venice	1%
Panhandle	1%
Mexico	1%
Other destinations in Florida	12%
Other destinations outside of Florida	17%

THE BEACHES OF
FORT MYERS
AND SANIBEL

Pre-Visit
Calendar Year 2019

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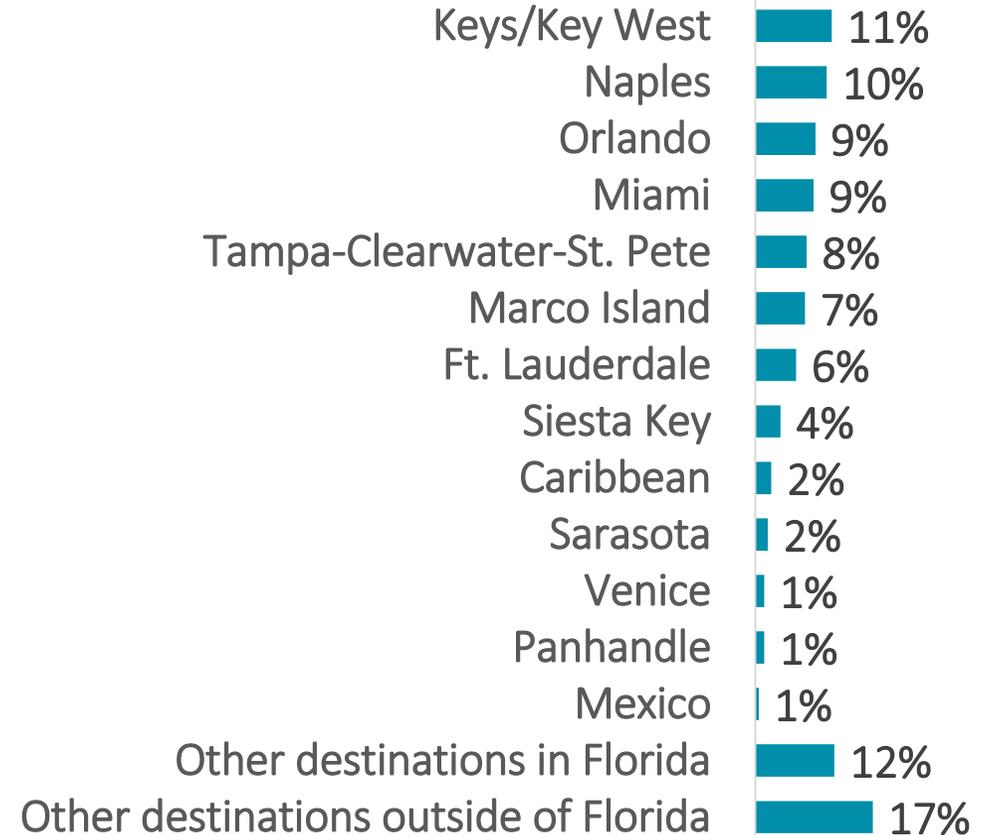
Trip Influencers

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

Attribute	Score
Warm weather	88%[1]
Peaceful/relaxing	87%
A safe destination	83%
White sandy beaches	82%
Clean, unspoiled environment	78%
Convenient location	77%
Plenty to see and do	75%
A "family" atmosphere	71%
Value for your travel dollar	69%
Reasonably priced lodging	63%

[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

Pre-Visit
Calendar Year 2019

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Reason for visiting

Vacation — 54%[1]
Beach — 47%
Relax and unwind — 47%
Visiting friends or relatives — 27%
Nature, environment, bird watching — 10%
Fishing, etc. — 6%
Biking, hiking, etc. — 4%
Sporting events — 4%
Special occasion — 4%
Shopping — 4%
Attractions — 4%
Golf or tennis — 3%
Water sports — 3%
Photography — 2%
Culture — 2%
Special event — 2%
Business conference/meeting — 2%
Museums, history — 2%
Guided Tours — 2%
Diving/snorkeling — 1%
Other — 9%

[1]Three responses permitted.

Pre-Visit
Calendar Year 2019

THE BEACHES OF
FORT MYERS
AND SANIBEL

downs & st. germain
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Promotions

32% of visitors recalled promotions for The Beaches of Fort Myers & Sanibel.

Source of Promotion

Source	Percentage
Internet	36%[1]
Television	30%
Social media	29%
Travel/visitor guide	13%
Newspaper	11%
Magazine	9%
www.FortMyers-Sanibel.com	9%
Traveler reviews/blogs	7%
AAA	7%
Brochure	6%
Radio	6%
Deal-based promotion	4%
Billboard	3%
Other	7%

[1]Multiple responses permitted.

THE BEACHES OF FORT MYERS AND SANIBEL

Pre-Visit
Calendar Year 2019

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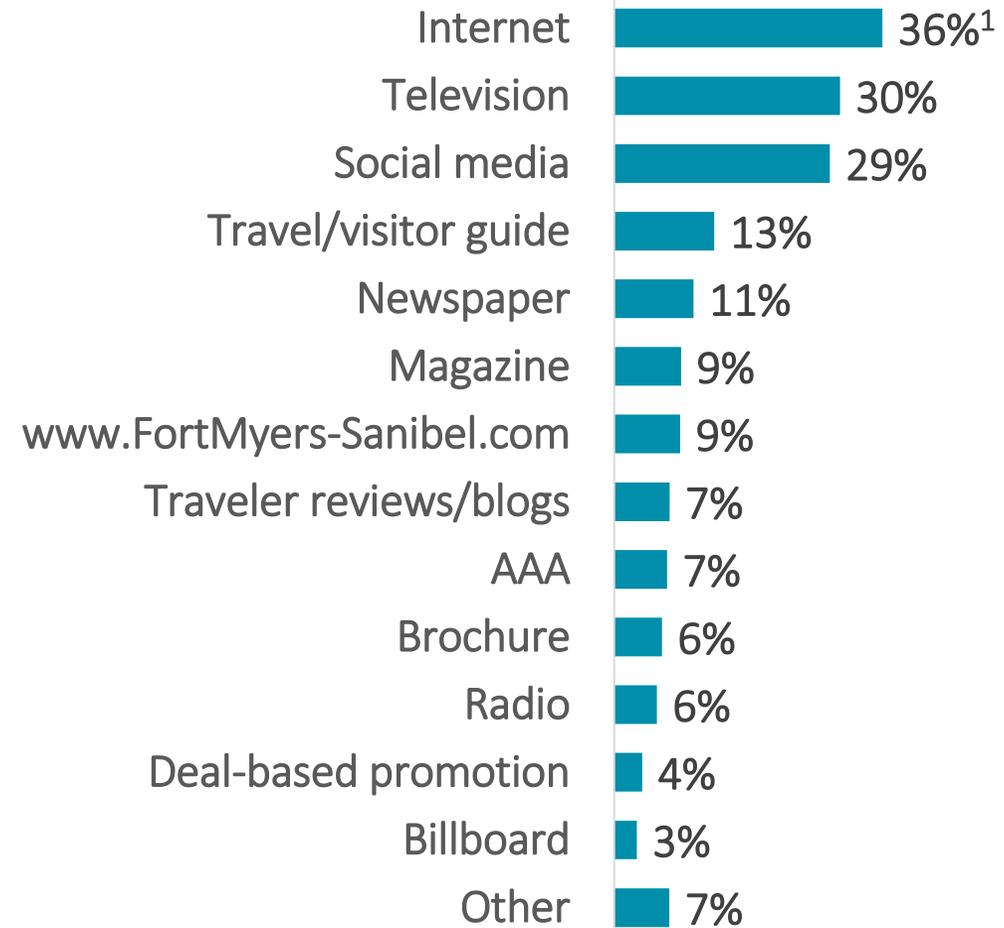
Booking

Over **4 in 10** visitors who stayed in paid accommodations booked directly with a hotel/condo.

Directly with hotel	44%
Online travel agency	15%
VRBO, HomeAway	14%
Through a vacation rental company	10%
Airbnb	8%
Other	9%

THE BEACHES OF
FORT MYERS AND SANIBEL

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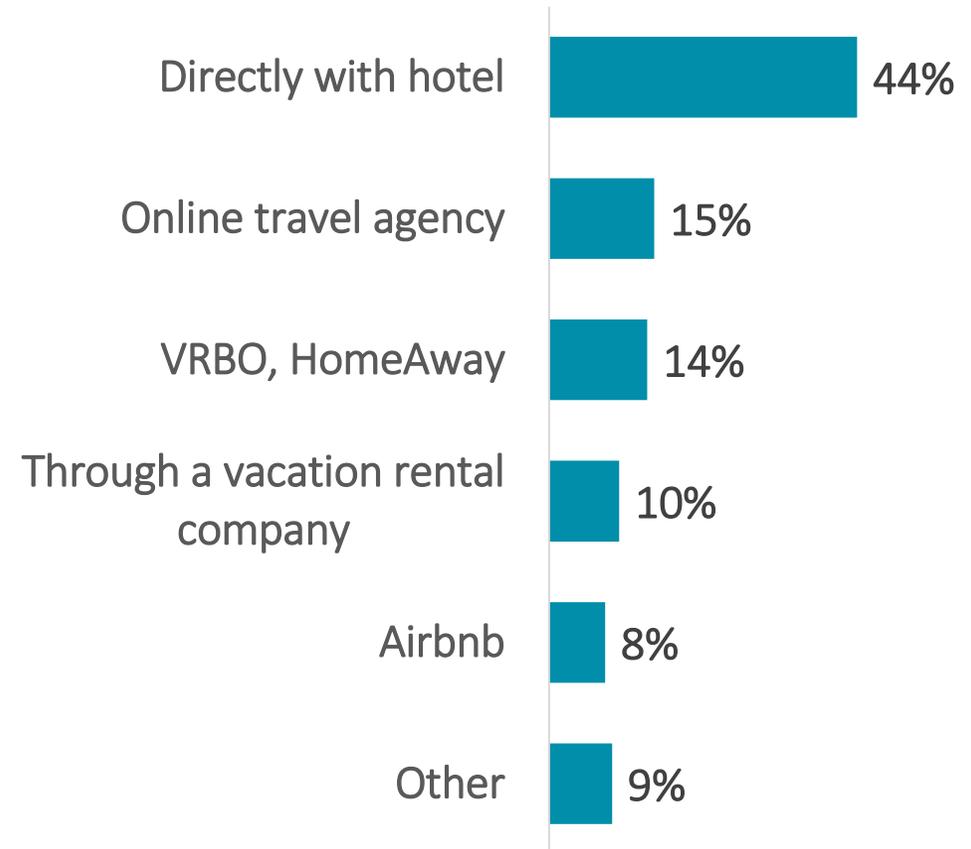
Transportation

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

Mode	Percentage
Fly	66%
Drive a personal vehicle	29%
Drive a rental vehicle	3%
Drive a RV	1%
Travel by bus	1%
Other	1%

THE BEACHES OF
FORT MYERS
AND SANIBEL

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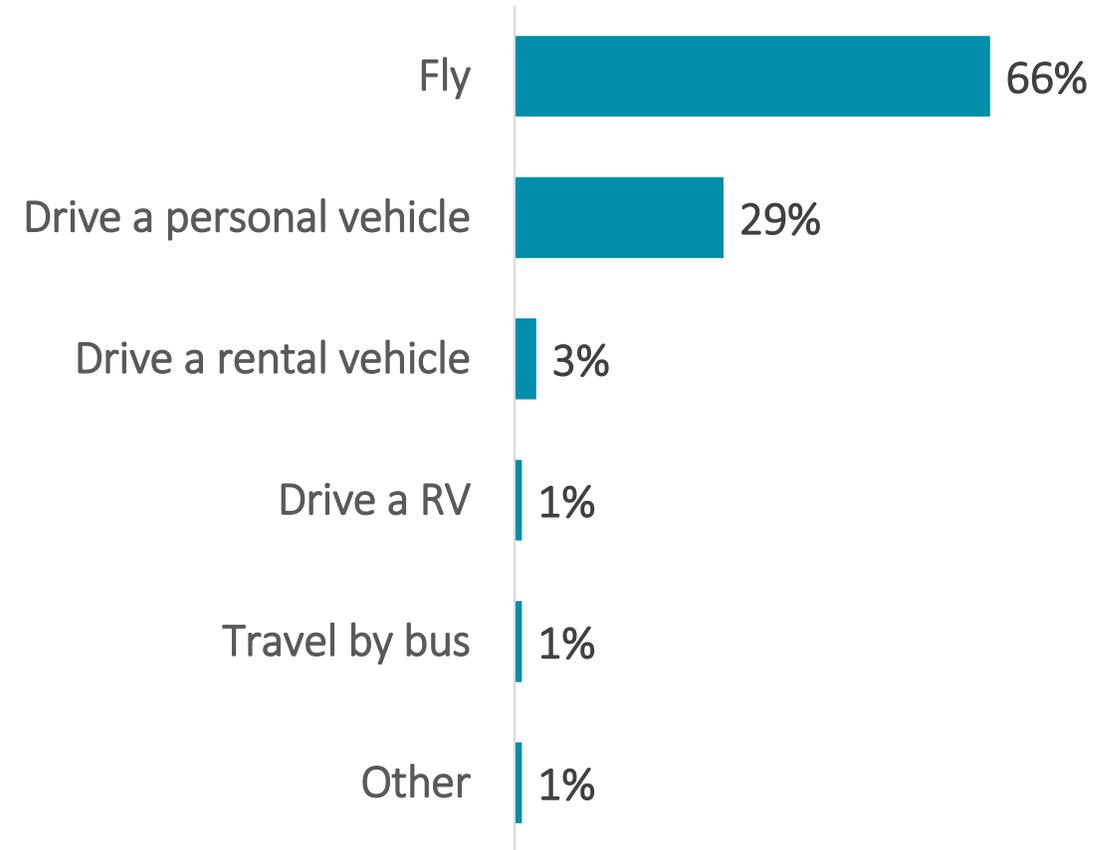
Airport

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

Southwest Florida International	72%
Punta Gorda	10%
Ft. Lauderdale International	4%
Miami International	5%
Tampa International	4%
Orlando International	4%
Other	2%

THE BEACHES OF FORT MYERS AND SANIBEL

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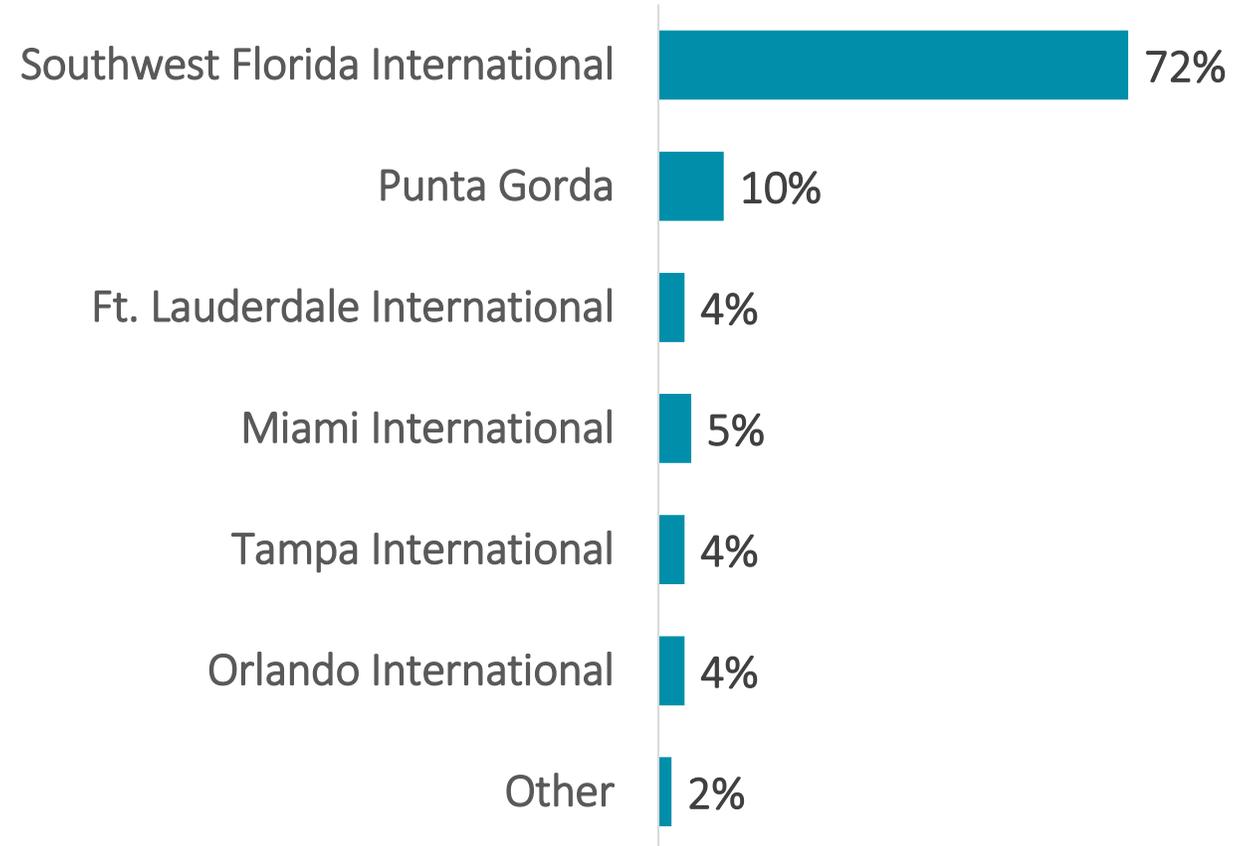
Use of RSW in the Past Year

54% of visitors used RSW at least once in the past year.

Did not use RSW	46%
1 trip	30%
2-3 trips	17%
4-5 trips	4%
6 or more trips	3%

THE BEACHES OF
FORT MYERS
AND SANIBEL

Pre-Visit
Calendar Year 2019

downs & st. germain
R E S E A R C H

Visitor Journey: Travel Party Profile

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

THE BEACHES OF FORT MYERS AND SANIBEL

Travel Party Profile
Calendar Year 2019

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Origin[1]

Origin	%
Florida	10%
Southeast	12%
Northeast	21%
Midwest	38%
West	5%
Canada	4%
United Kingdom	2%
Germany	4%
Other Europe	2%
Other International	2%

86% of visitors came from **the US**

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

Travel Party Profile
Calendar Year 2019

THE BEACHES OF
FORT MYERS
AND SANIBEL

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Number of Visitors by Origin

Origin	Visitors
Florida	472,934
Southeast	591,168
Northeast	1,044,397
Midwest	1,876,958
West	241,394
Canada	216,762
United Kingdom	103,454
Germany	192,130
Other Europe	108,381
Other International	78,822

THE BEACHES OF FORT MYERS AND SANIBEL

Travel Party Profile
Calendar Year 2019

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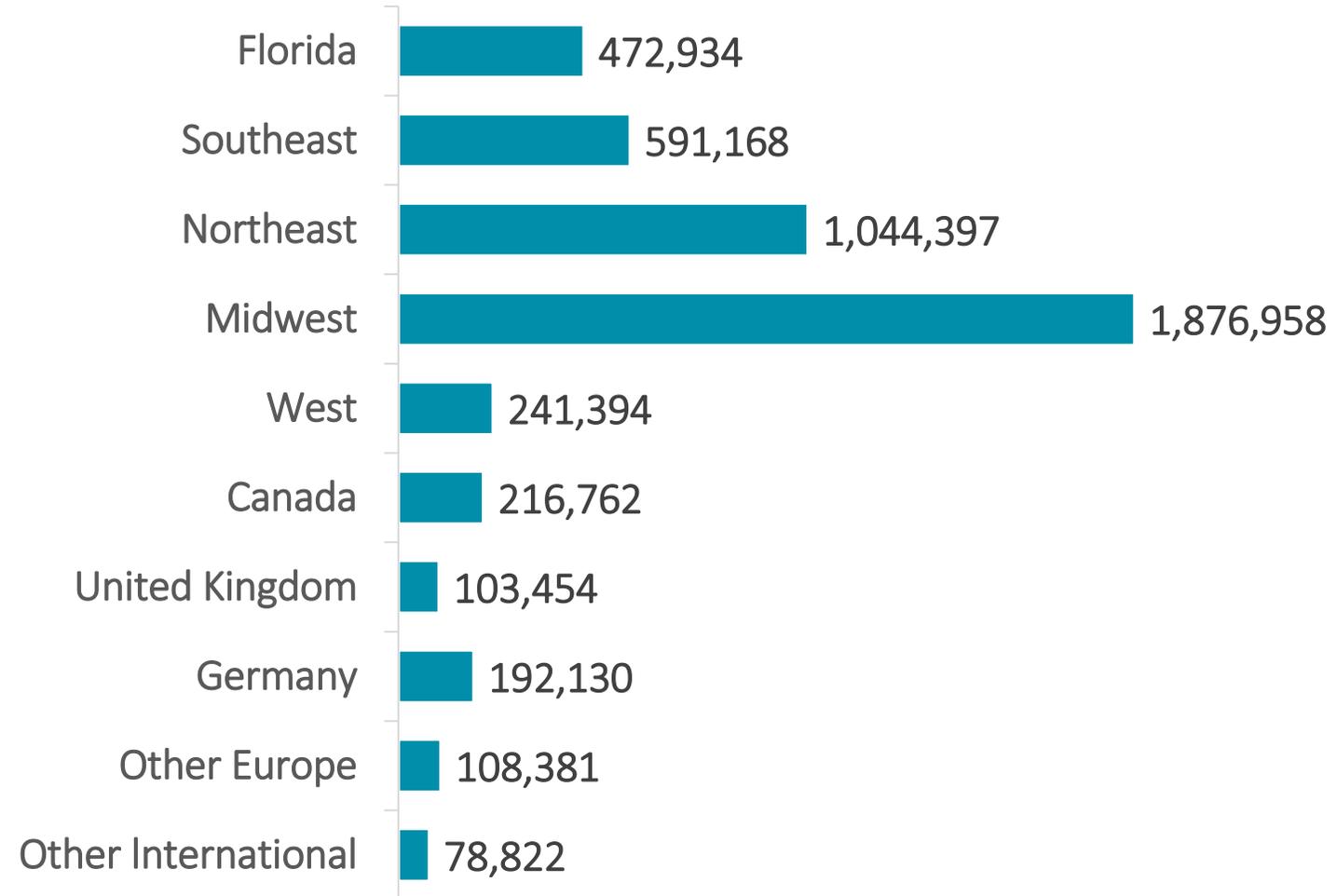
Number of Visitors by Origin

Domestic Out-of-State 3,753,917

In-State 472,934

International 699,549

76%

10%

14%
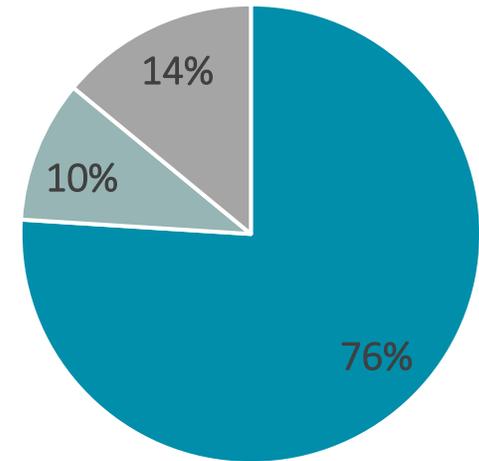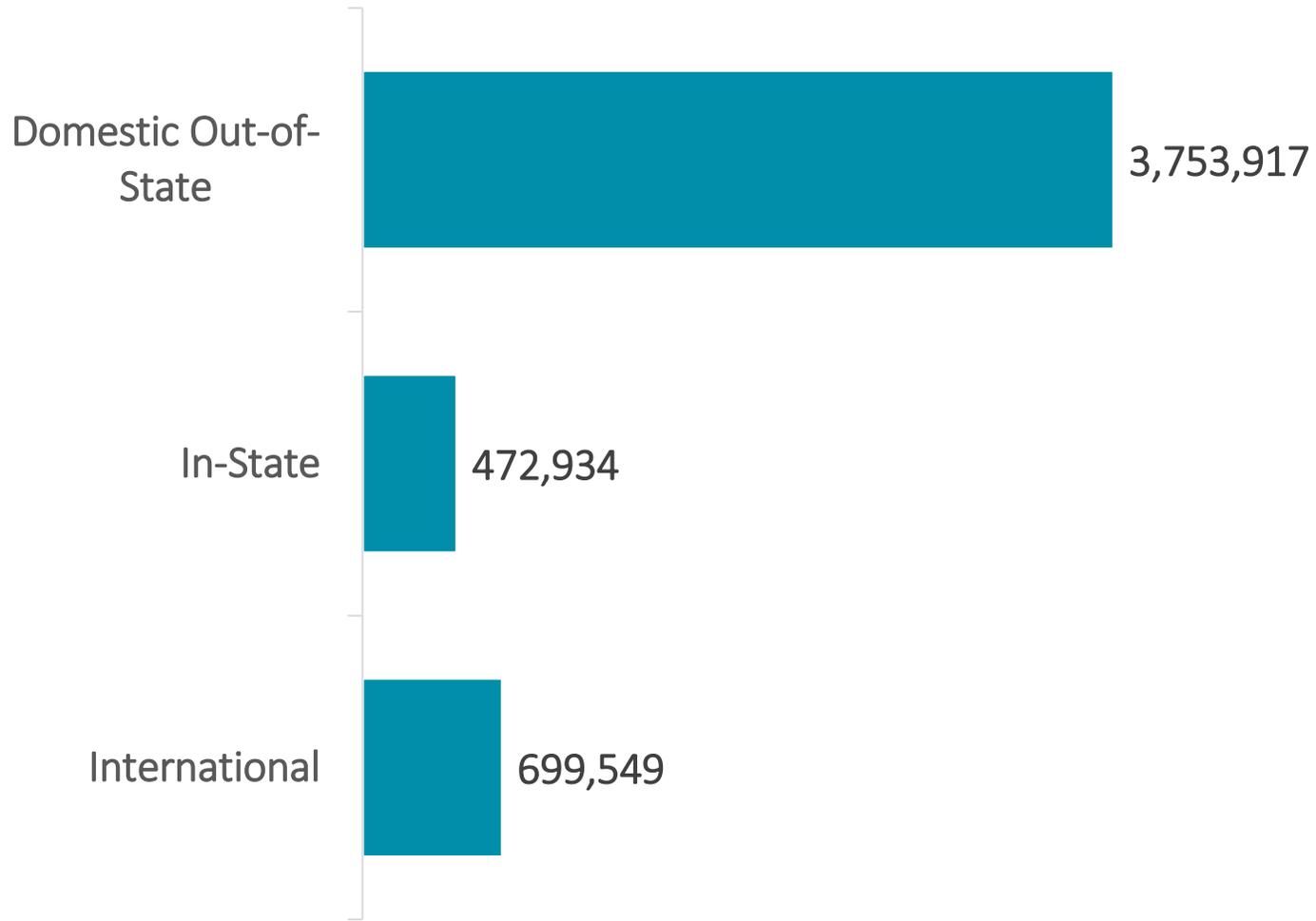
- Domestic Out-of-State
- In-State
- International

Travel Party Profile
Calendar Year 2019

THE BEACHES OF
FORT MYERS
AND SANIBEL

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5 Year Trend: US vs. International Visitation

Visitor Origin

■ International ■ US

Year	International	US
2015	26%	74%
2016	27%	73%
2017	21%	79%
2018	14%	86%
2019	14%	86%

THE BEACHES OF FORT MYERS AND SANIBEL

Calendar Year 2019

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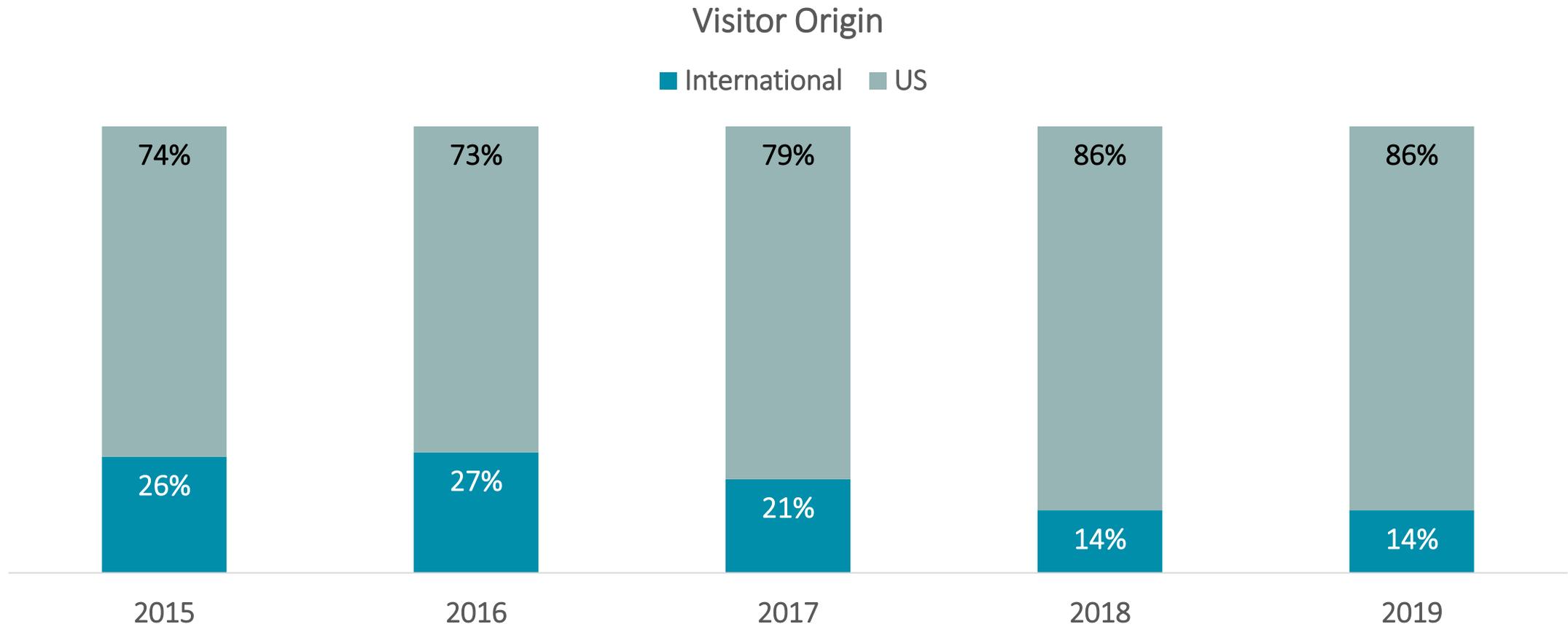
5 Year Trend: Origin

Country	2015	2016	2017	2018	2019
Florida	6%	6%	6%	9%	10%
Southeast	11%	12%	13%	16%	12%
Northeast	18%	17%	20%	20%	21%
Midwest	37%	34%	37%	37%	38%
West	3%	4%	3%	3%	5%
International	26%	27%	21%	14%	14%

Travel Party Profile
Calendar Year 2019

Origin Country

Country	% of Visitors
United States	85.9%
Germany	3.9%
Canada	4.4%
United Kingdom	2.3%
Switzerland	0.4%
Sweden	0.3%
Brazil	0.3%
Netherlands	0.3%
Norway	0.2%
Other	2.0%

The United States share of Lee County visitors has increased over the past several years, now accounting for 6 out of 7 visitors.

Canada and Germany are the largest foreign origin markets followed by the United Kingdom.

Travel Party Profile
Calendar Year 2019

5 Year Trend: Origin Country

Country	2015	2016	2017	2018	2019
United States	74%	73%	79%	86%	86%
Germany	9%	11%	6%	4%	4%
Canada	6%	6%	8%	4%	4%
United Kingdom	6%	5%	3%	2%	2%
Other	5%	5%	4%	4%	4%

Travel Party Profile
Calendar Year 2019

Top Origin Markets[1]

Market	Percentage of Visitors
New York City	5%
Chicago	5%
Minneapolis	5%
Cincinnati	4%
Boston	3%
Miami-Ft. Lauderdale	3%
Indianapolis	3%
Detroit	2%
Cleveland	2%
Philadelphia	2%
Washington DC-Baltimore	2%
Tampa-St. Pete-Clearwater	2%
Naples	2%
Green Bay-Appleton	2%
Columbus	2%
St. Louis	2%
Atlanta	2%
Milwaukee	2%
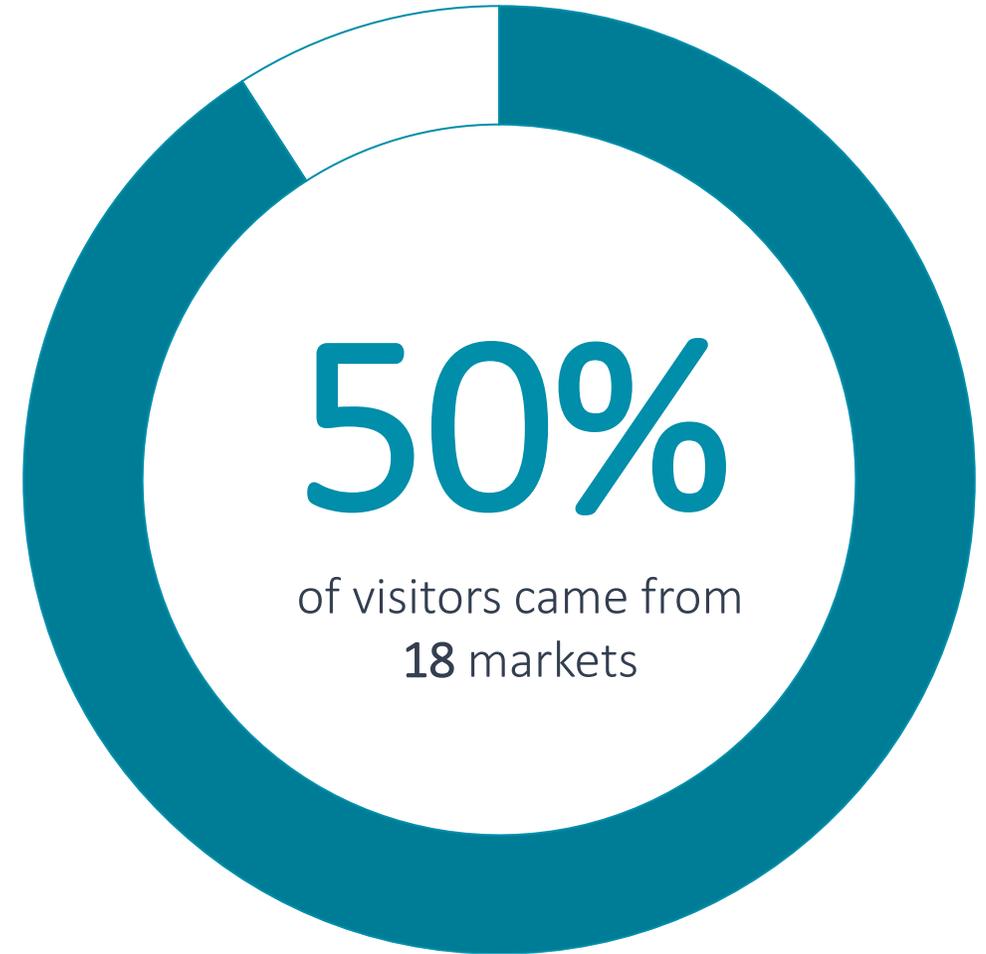
50%
of visitors came from
18 markets

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

THE BEACHES OF
FORT MYERS
AND SANIBEL

Travel Party Profile
Calendar Year 2019

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R E S E A R C H

Top International Origin Markets[1]

Market	Percentage of Visitors
Toronto	1.2%
Ottawa-Gatineau	0.5%
London-Chatham-Kent-Windsor	0.3%
Munich	0.3%
Berlin	0.3%
London	0.3%
Frankfurt	0.3%
Montreal	0.2%
Cologne	0.2%
Hamburg	0.2%
Stuttgart	0.2%
Manchester	0.1%
Paris	0.1%
Lyon	0.1%
Dusseldorf	0.1%
Erfurt	0.1%
Liverpool	0.1%
Northampton	0.1%
Vancouver	0.1%
Edmonton	0.1%
Quebec City	0.1%
Winnipeg	0.1%
Calgary	0.1%
Halifax	0.1%
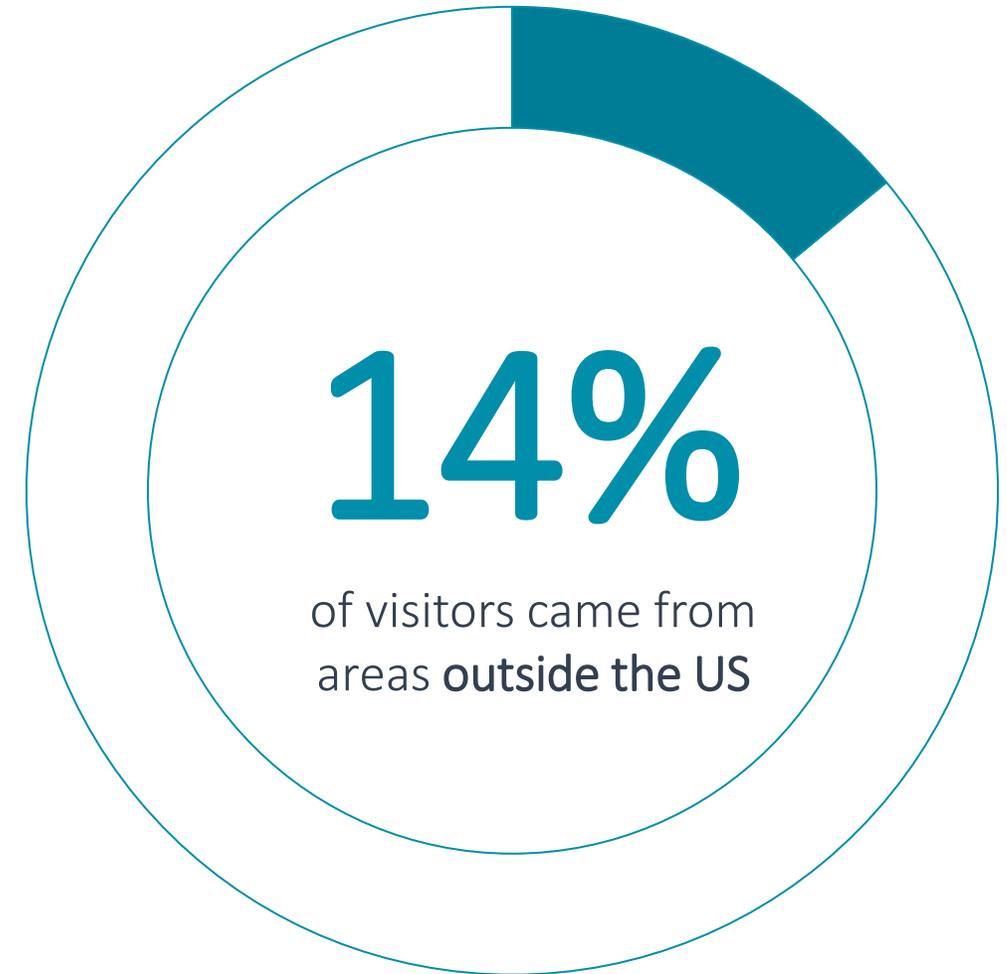
14%

of visitors came from areas **outside the US**

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

THE BEACHES OF FORT MYERS AND SANIBEL

Travel Party Profile
Calendar Year 2019

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R E S E A R C H

Travel Party Size and Composition

Travel Party Size
Visitors traveled in a party composed of **3.1**[1] people.

Travel with Children
27% of visitors traveled with children under the age of 18.
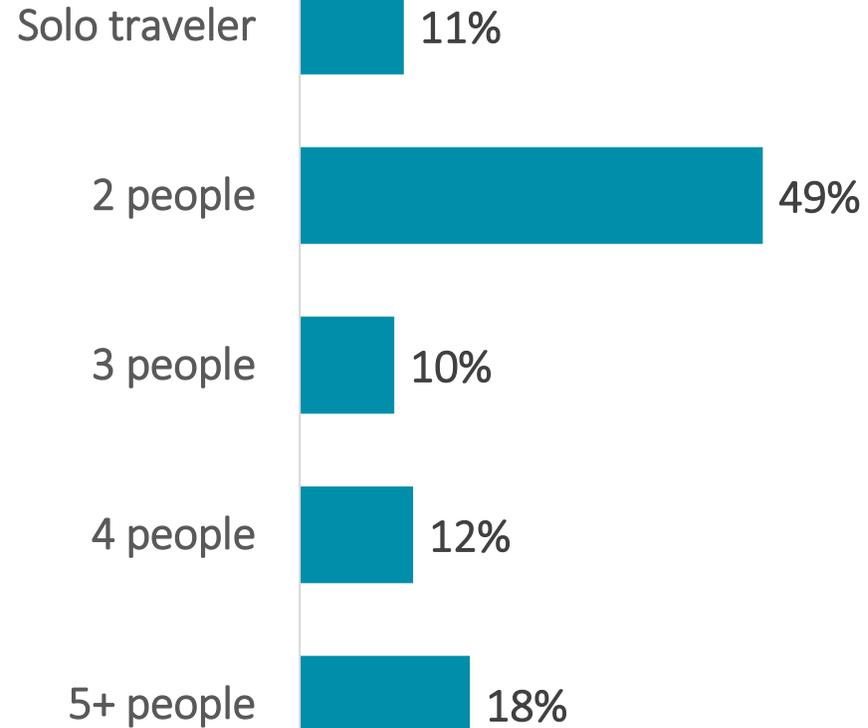
Solo traveler	11%
2 people	49%
3 people	10%
4 people	12%
5+ people	18%

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

THE BEACHES OF FORT MYERS AND SANIBEL

Travel Party Profile
Calendar Year 2019

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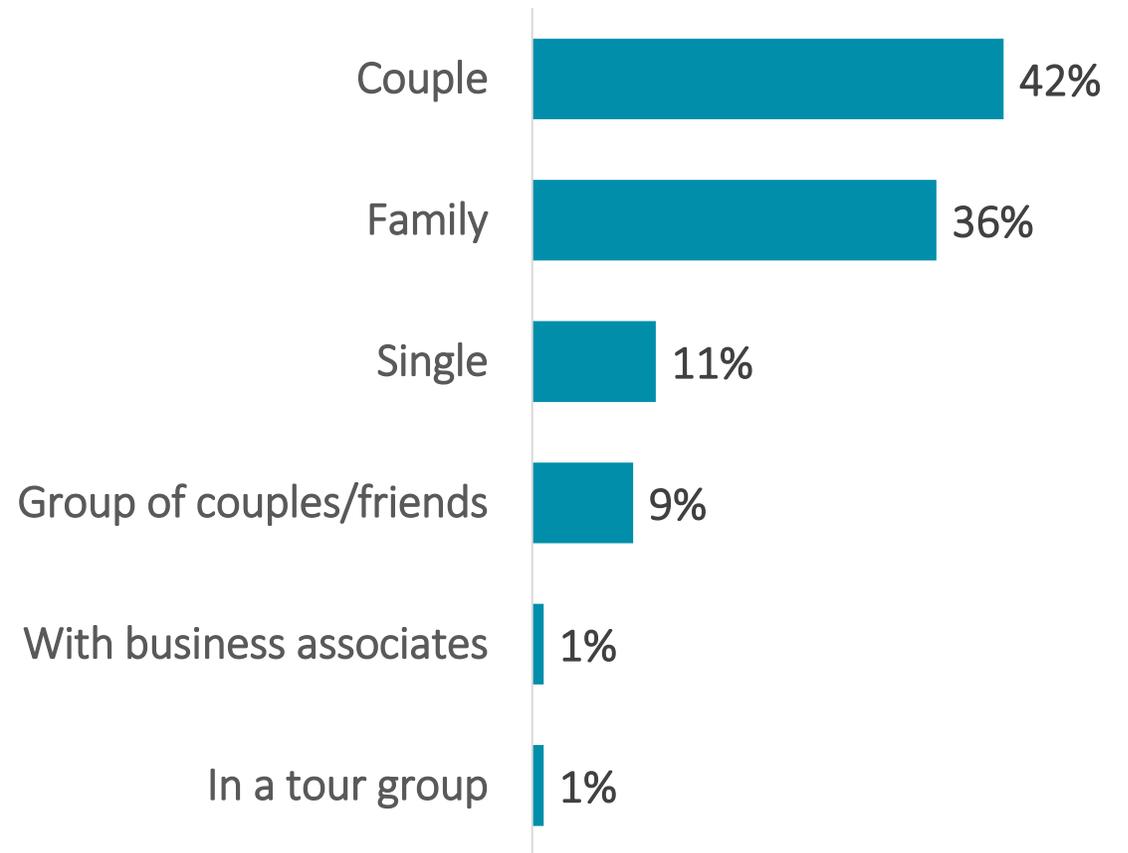
Age

Average Age

The average age of 2019 visitors was **54 years old.**

Younger than 25 ▮ 5%

25-39 ▮ 17%

40-54 ▮ 26%

55-69 ▮ 39%

70+ ▮ 13%

THE BEACHES OF
FORT MYERS
AND SANIBEL

Travel Party Profile
Calendar Year 2019

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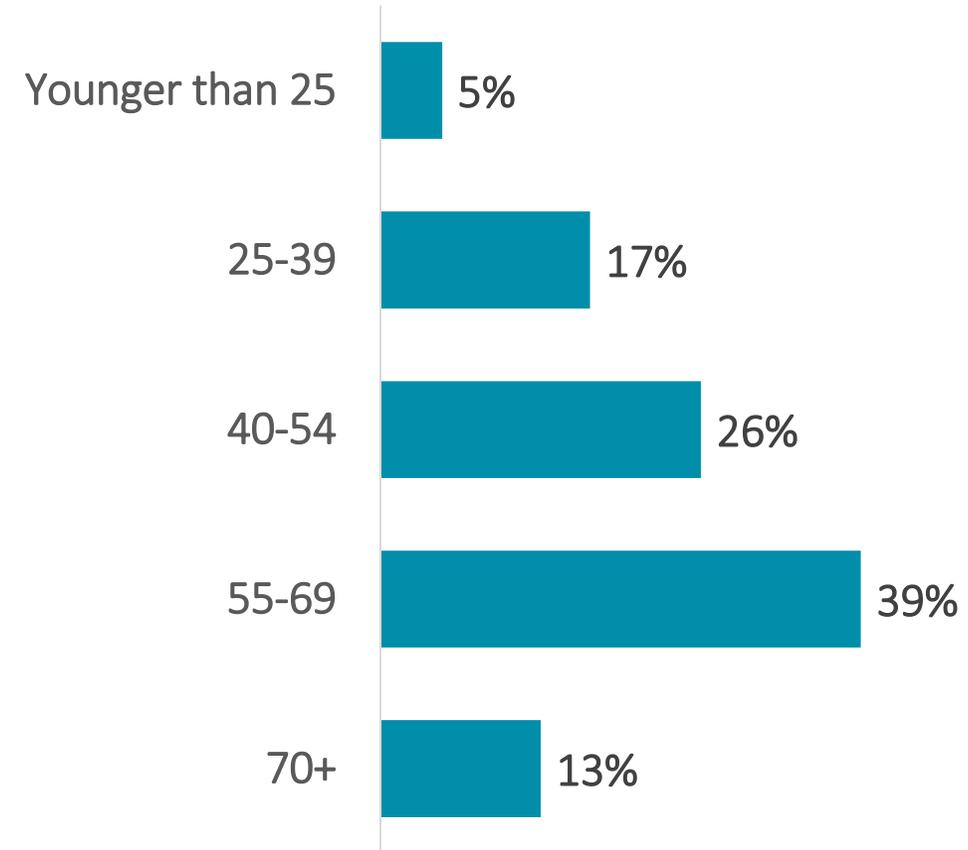
Household Income

Median Household Income
2019 visitors had a median household income of
$102,900.

Income	Percent
<$50,000	13%
$50,000 - $74,999	17%
$75,000 - $99,999	18%
$100,000 - $124,999	17%
$125,000 - $149,999	10%
$150,000 - $199,999	11%
$200,000 - $249,999	6%
$250,000 and over	8%

Marital Status

- Married — 74%
- Single — 21%
- Other — 5%

Travel Party Profile
Calendar Year 2019
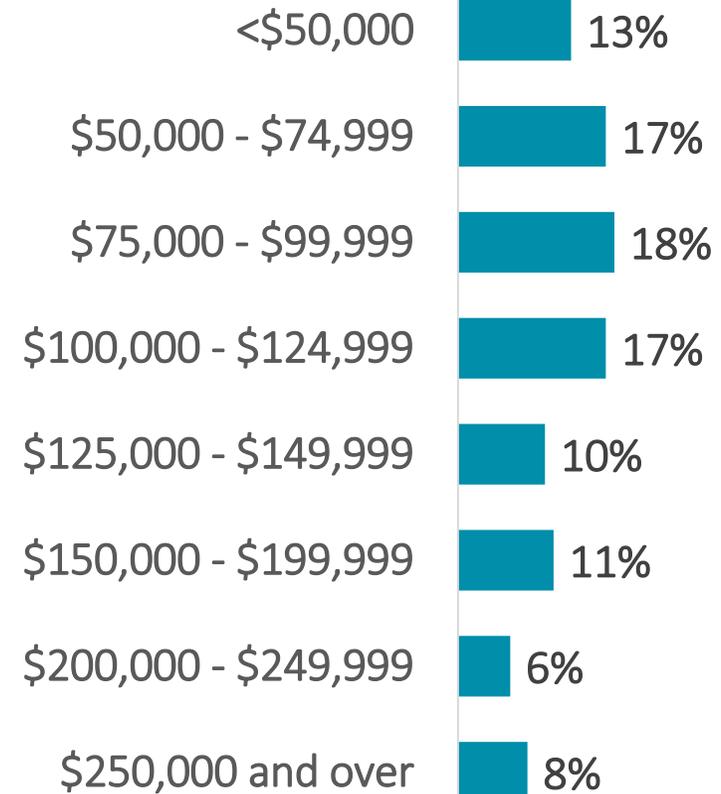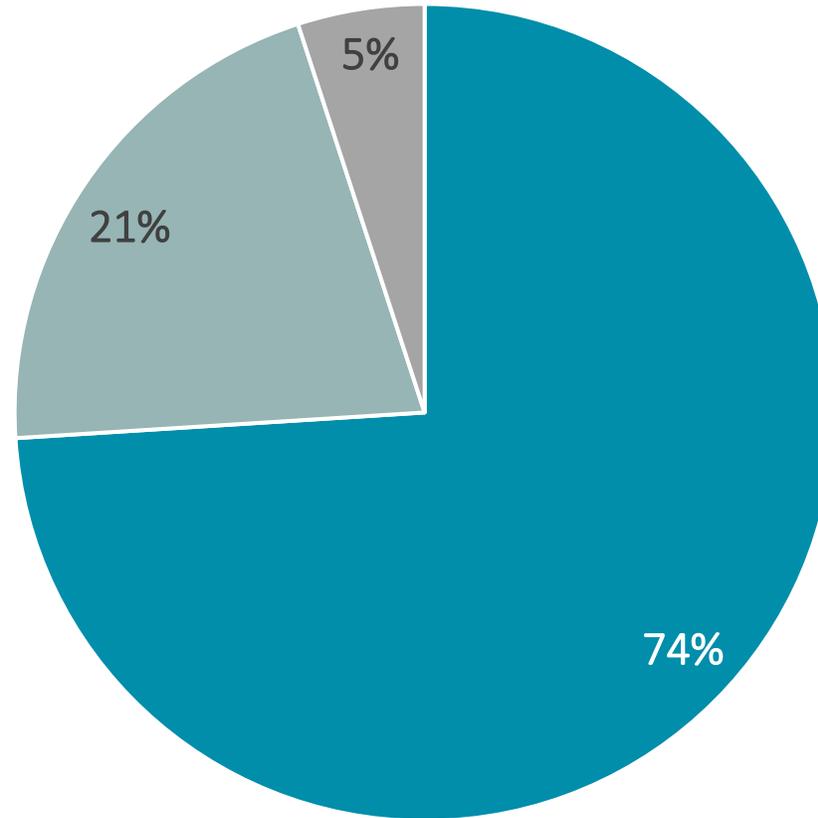
Education

College Education
61% of 2019 visitors were college graduates.

Some high school or high school degree — 14%

Some college or Associate degree — 25%

College Graduate — 40%

Post Graduate work or degree — 21%

THE BEACHES OF FORT MYERS AND SANIBEL

Travel Party Profile
Calendar Year 2019

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Race/Ethnicity

Caucasion or white — 85%
Hispanic — 5%
African American — 4%
Asian — 2%
Other — 4%

Travel Party Profile
Calendar Year 2019

Gender

- ■ Male ■ Female

Travel Party Profile
Calendar Year 2019

Visitor Journey: Trip Experience

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

THE BEACHES OF
FORT MYERS
AND SANIBEL

Travel Party Profile
Calendar Year 2019

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Accommodations

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

Accommodation	Percentage
Hotel/Motel/Resort/B&B	32%
Condo/Vacation rental	31%
Non-paid accommodations	31%
Day tripper	4%
RV Park/Campground	2%

THE BEACHES OF
FORT MYERS
AND SANIBEL

Travel Party Profile
Calendar Year 2019

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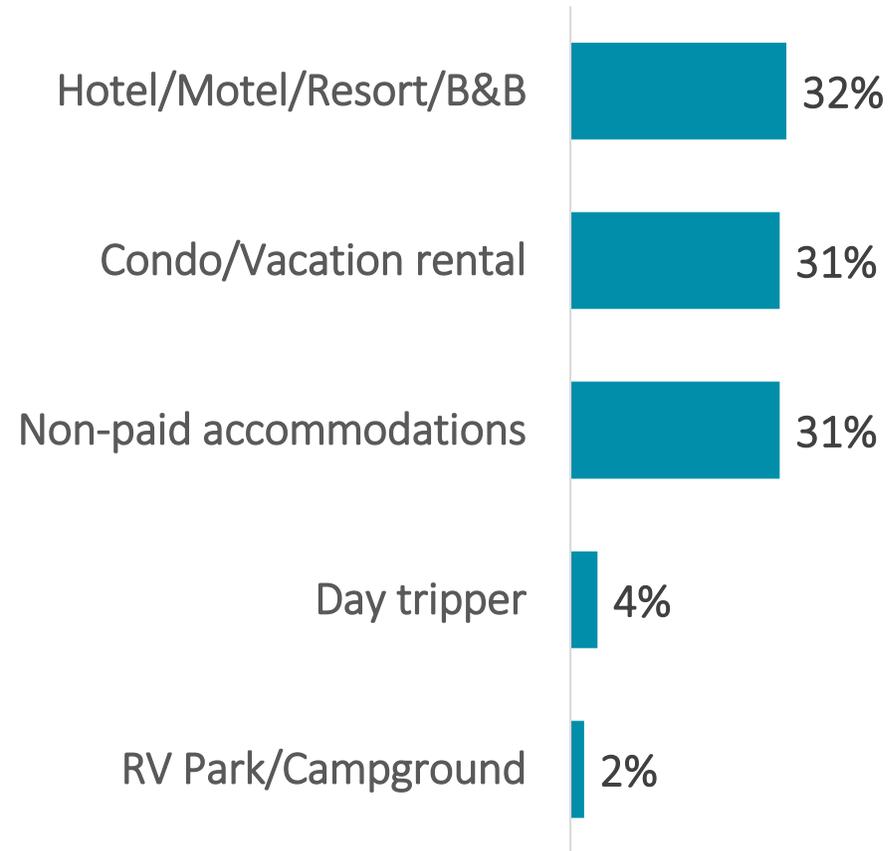
Nights Stayed

All Visitors

Visitors spent 9.9[1] nights in The Beaches of Fort Myers & Sanibel.

Visitors Staying in Paid Accommodations

Visitors staying in paid accommodations spent 7.7[2] nights in The Beaches of Fort Myers & Sanibel.

	All Visitors
1 night	4%
2-3 nights	15%
4-5 nights	17%
6-9 nights	34%
10-15 nights	14%
16-30 nights	5%
More than 30 nights	11%
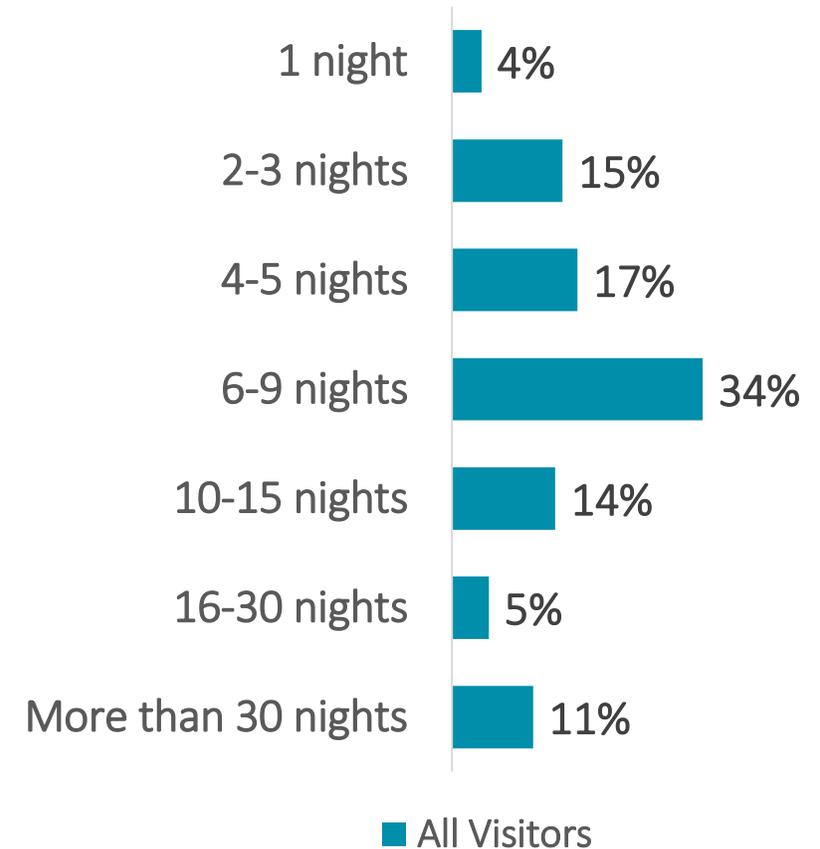
[1]When including extended stay visitors, average nights stayed for all visitors was 14.9 nights. Source: Visitor Tracking Survey
[2]When including extended stay visitors, average nights stayed for visitors staying in paid accommodations was 11.7 nights. Source: Visitor Tracking Survey

THE BEACHES OF FORT MYERS AND SANIBEL

Travel Party Profile
Calendar Year 2019

DS downs & st. germain
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First Time and Experienced Visitors

First Time vs. Repeat Visitors
29% of visitors had made 11+ visits, while **23%** were visiting for the first time.

First-time — 23%

2-5 visits — 32%

6-10 visits — 16%

11+ visits — 29%

THE BEACHES OF FORT MYERS AND SANIBEL

Travel Party Profile
Calendar Year 2019

DS downs & st. germain
R E S E A R C H

Visitor Activities

Activity	Percentage
Beaches	74%[1]
Relax & unwind	68%
Dining	62%
Shopping	44%
Visiting friends/relatives	33%
Nature, environment, bird watching	32%
Attractions	19%
Biking, hiking etc.	19%
Water sports	19%
Bars, nightlife	15%
Photography	15%
Fishing	13%
Golf or tennis	13%
Special event	8%
Museums, history, etc.	8%
Culture	8%
Sporting event	7%
Guided tours	6%
Spas	4%
Special occasion	4%
Diving/snorkeling	3%
Business conference or meeting	2%
Other	4%

[1]Multiple responses permitted.

THE BEACHES OF FORT MYERS AND SANIBEL

Travel Party Profile
Calendar Year 2019

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R E S E A R C H

Reason for Visiting vs. Visitor Activities

	Reason for Visiting		Visitor Activities
	47%[1]	Beaches	74%[2]
Key Reasons for Visiting	47%	Relax & unwind	68%
	27%	Visiting friends/relatives	33%
	10%	Nature	32%
	6%	Fishing	13%
	4%	Biking, hiking etc.	19%
	4%	Sporting event	7%
	4%	Special occasion	4%
Trip Enhancements	4%	Shopping	44%
	4%	Attractions	19%
	3%	Golf or tennis	13%
	3%	Water sports	19%
	2%	Photography	15%
	2%	Culture	8%
	2%	Special event	8%
	2%	Business	2%
	2%	Guided tours	6%
	2%	Museums, history, etc.	8%
	1%	Diving/snorkeling	3%

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

THE BEACHES OF FORT MYERS AND SANIBEL

Travel Party Profile
Calendar Year 2019

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R E S E A R C H

Attractions Visited

Attraction	Percentage
Beaches	75%[1]
Fort Myers Beach Pier	35%
Sanibel Lighthouse	30%
Edison & Ford Winter Estates	24%
Miromar Outlets Mall	20%
Sanibel Outlets	19%
J.N. Ding Darling National Wildlife Refuge	14%
Periwinkle Place	12%
Bell Tower Shops	8%
Coconut Point Mall	8%
Shell Factory and Nature Park	8%
Gulf Coast Town Center	7%
Manatee Park	5%
Broadway Palm Dinner Theater	3%
Bailey-Matthews Shell Museum	2%
Barbara B. Mann Performing Arts Hall	2%
Other	6%
None	13%

[1]Multiple responses permitted.

THE BEACHES OF FORT MYERS AND SANIBEL

Travel Party Profile
Calendar Year 2019

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R E S E A R C H

Community Stayed

Fort Myers	22%
Sanibel Island	21%
Fort Myers Beach	20%
Cape Coral	16%
Bonita Springs	5%
Captiva Island	3%
North Fort Myers	3%
Estero	2%
Lehigh Acres	1%
Pine Island	1%
Boca Grande/Outer Island	1%
Along I-75	1%
None/not staying overnight	4%

Travel Party Profile
Calendar Year 2019

Visitor Journey: Post-Trip Evaluation

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

Satisfaction

Likely to recommend — 92%

Likely to return — 92%

Likely to return next year — 66%

THE BEACHES OF FORT MYERS AND SANIBEL

downs & st. germain
R E S E A R C H

Satisfaction Ratings

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2018	2019	2018	2019	2018	2019	2018	2019
Likely to Recommend	82%	88%	88%	94%	87%	92%	91%	93%
Likely to Return	78%	82%	91%	94%	89%	91%	85%	89%
Likely to Return Next Year	34%	41%	56%	73%	53%	64%	52%	65%

THE BEACHES OF
FORT MYERS
AND SANIBEL

downs & st. germain
R E S E A R C H

Satisfaction

Satisfaction with Overall Visit

68% | 28% | 2% | 1% | 1%

Satisfaction with Customer Service

61% | 31% | 3% | 1% | 4%

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

Post-Trip Evaluation
Calendar Year 2019
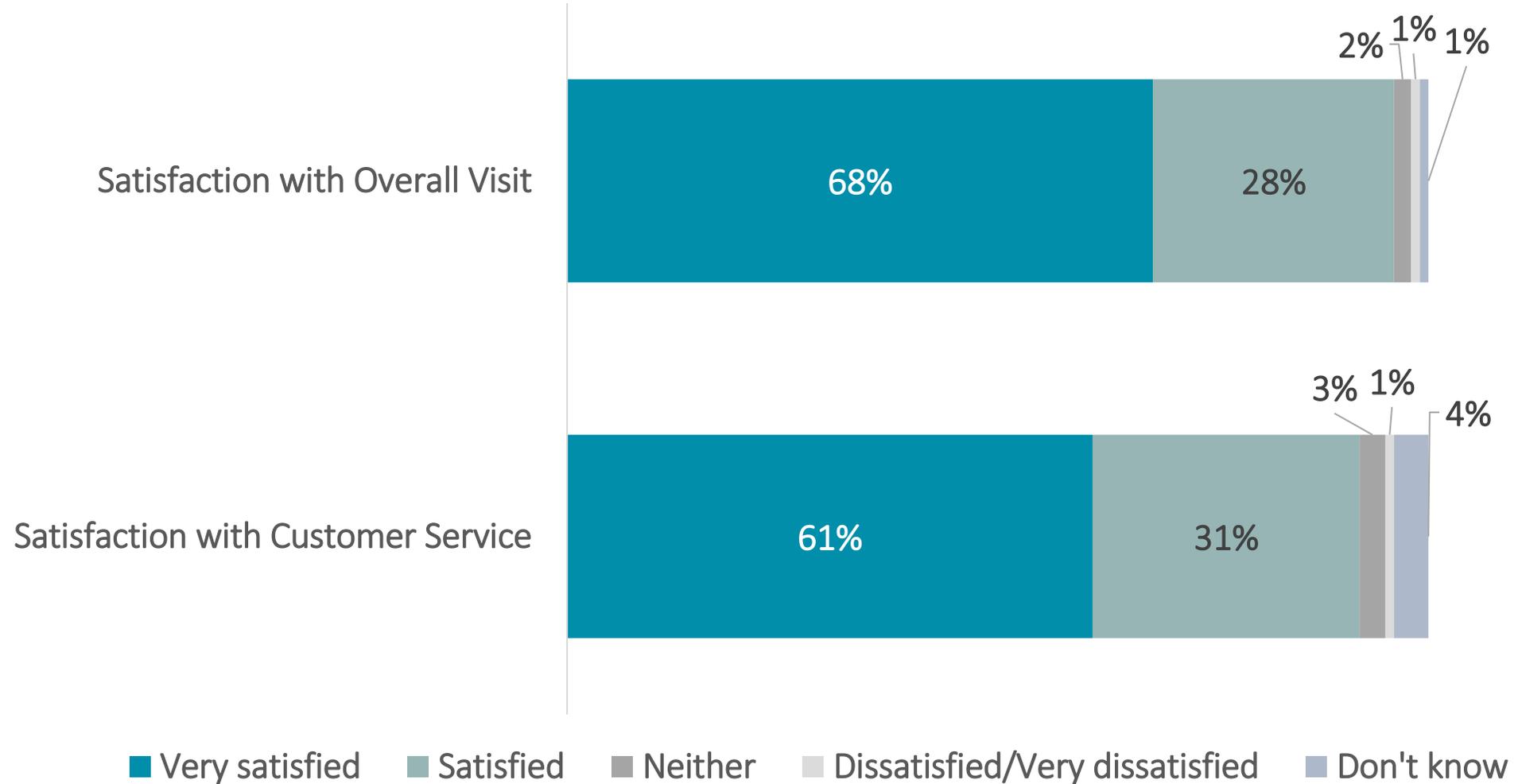
Satisfaction Ratings: Overall Visit

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2018	2019	2018	2019	2018	2019	2018	2019
Very Satisfied	48%	63%	55%	72%	54%	69%	57%	74%
Satisfied	44%	32%	38%	24%	39%	27%	38%	23%

THE BEACHES OF FORT MYERS AND SANIBEL

Post-Trip Evaluation
Calendar Year 2019

downs & st. germain
RESEARCH

Satisfaction Ratings: Customer Service

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2018	2019	2018	2019	2018	2019	2018	2019
Very Satisfied	43%	59%	42%	62%	42%	61%	42%	64%
Satisfied	43%	32%	46%	31%	45%	32%	44%	27%

Post-Trip Evaluation
Calendar Year 2019

Satisfaction Ratings: Quality of Accommodations

Quality of Accommodations

3%

38%

59%
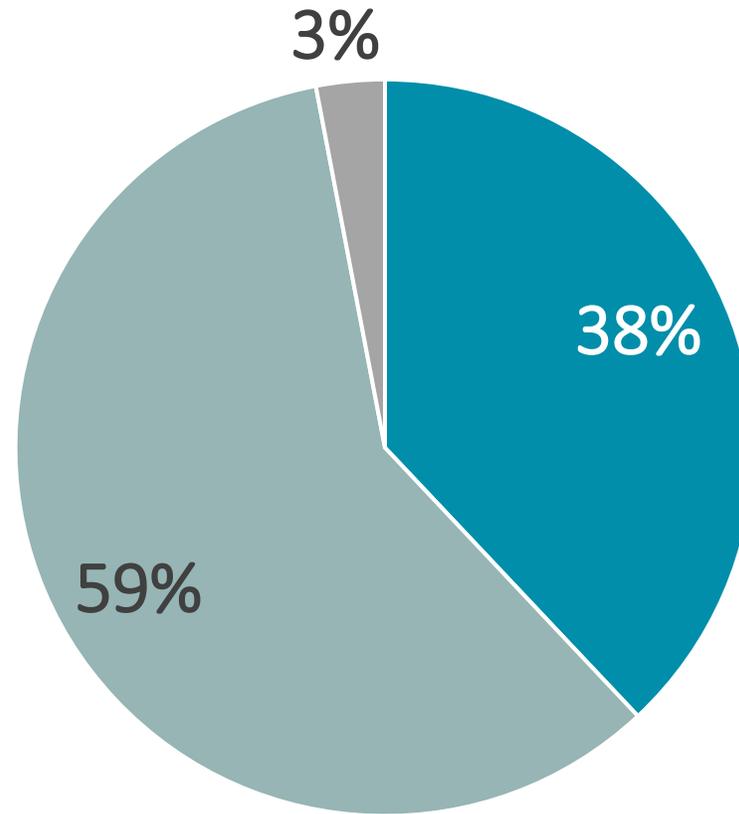
■ Far exceeded/exceeded expectations   ■ Met expectations   ■ Did not meet/far below expectations

THE BEACHES OF
FORT MYERS
AND SANIBEL

Post-Trip Evaluation
Calendar Year 2019

downs & st. germain
R E S E A R C H

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	42%	40%	38%	39%	39%	38%	40%	42%
Met Expectations	55%	57%	59%	58%	58%	59%	55%	53%
Did Not Meet Expectations	3%	3%	3%	3%	3%	2%	5%	5%

THE BEACHES OF FORT MYERS AND SANIBEL

Post-Trip Evaluation
Calendar Year 2019

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R E S E A R C H

Attribute Ratings

95% or more of visitors gave high experience ratings for warm weather, peace, and safety in The Beaches of Fort Myers & Sanibel.
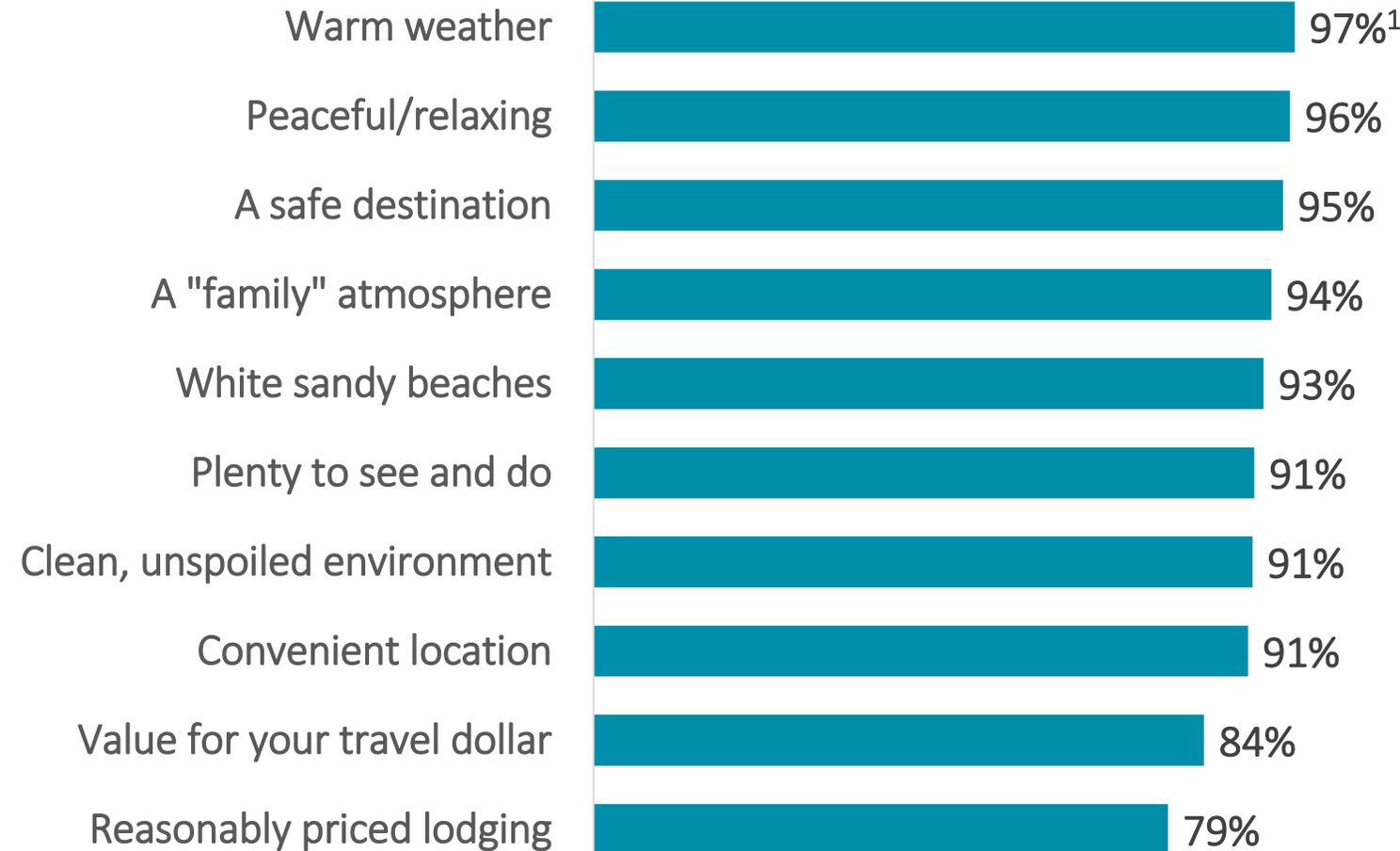
Attribute	Rating
Warm weather	97%[1]
Peaceful/relaxing	96%
A safe destination	95%
A "family" atmosphere	94%
White sandy beaches	93%
Plenty to see and do	91%
Clean, unspoiled environment	91%
Convenient location	91%
Value for your travel dollar	84%
Reasonably priced lodging	79%

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

THE BEACHES OF FORT MYERS AND SANIBEL

downs & st. germain
R E S E A R C H

Vacation Attribute Influence vs. Ratings
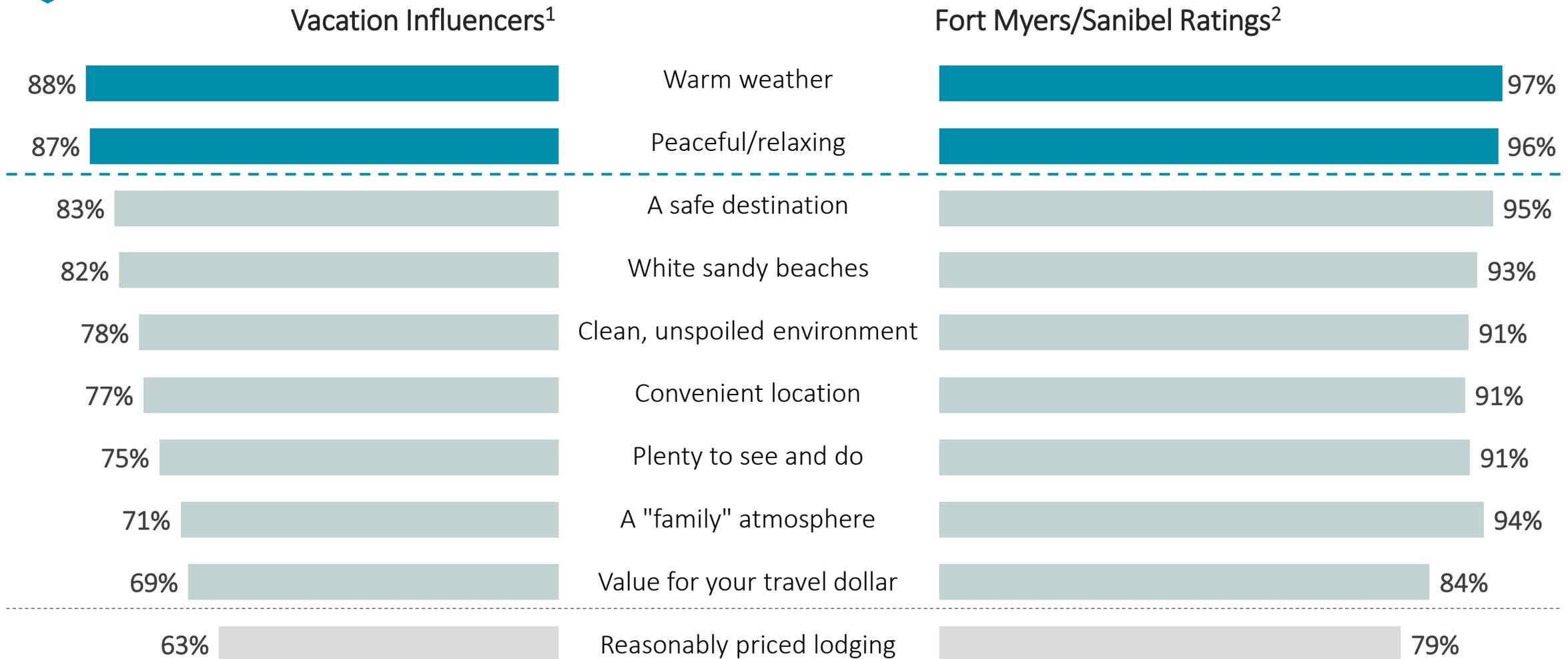
	Vacation Influencers[1]		Fort Myers/Sanibel Ratings[2]
Warm weather	88%		97%
Peaceful/relaxing	87%		96%
A safe destination	83%		95%
White sandy beaches	82%		93%
Clean, unspoiled environment	78%		91%
Convenient location	77%		91%
Plenty to see and do	75%		91%
A "family" atmosphere	71%		94%
Value for your travel dollar	69%		84%
Reasonably priced lodging	63%		79%

[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.

THE BEACHES OF FORT MYERS AND SANIBEL

**Post-Trip Evaluation
Calendar Year 2019**

downs & st. germain R E S E A R C H

Visitor Concerns

3 in 10 visitors were concerned about traffic.

Concern	Percent
Traffic	30%
Red Tide	18%
Beach seaweed	16%
Insects	14%
Water quality	12%
High prices	10%
Weather	5%
Lack of nightlife	3%
Quality of accommodations	2%
Other	4%
Nothing	29%

[1]Multiple responses permitted.

Post-Trip Evaluation
Calendar Year 2019

THE BEACHES OF FORT MYERS AND SANIBEL

downs & st. germain
R E S E A R C H

Area Descriptions

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

Description	Percent
Wonderful place to visit	38%[1]
Beautiful beaches	31%
Relaxing & peaceful	29%
Fun things to do	11%
Warm weather	10%
Natural	7%
Friendly people	6%
Family friendly	6%
Clean	5%
Nice restaraunts	4%
Crowded, lots of traffic	4%
Water quality/seaweed issues	3%
Great geographic location	3%
Safe	2%
Convenient, walkable	2%
Expensive	1%
Good place to retire	1%

[1]Coded verbatim responses; multiple responses permitted.

Area Descriptions

Wonderful Place to Visit

- "Sometimes you just need to get away and this is a great place to do that."
- "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 a great place to stay and visit. It's safe, friendly, and not too expensive."
- "Love the natural beaches, not extremely crowded, lots of shells, very relaxing."

Beautiful Beaches

- "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, happy, warm, sunny – you have to spend the day here, it's heaven."
- "Beautiful beaches with great shelling! Friendly atmosphere with happy people."
- "Relaxing, unspoiled, beautiful. Something for everyone."

THE BEACHES OF
FORT MYERS
AND SANIBEL

Post-Trip Evaluation
Calendar Year 2019

DS downs & st. germain
R E S E A R C H

Area Descriptions

Relaxing & Peaceful

- "Very peaceful and relaxing atmosphere where one can unwind and chill out."
- "Very calming and peaceful; a nice place to unwind."
- "A nice relaxing area. I enjoyed photographing the sunrises on the beach and finding beautiful shells during my morning walks."
- "Very laid back, great beach, shelling, sea creatures. Soul renewing!"

Fun things to do

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

Year-Over-Year Comparisons

Economic Impact

Visitor & Lodging Statistics	2018	2019	% Change
Visitors	4,793,800	4,926,400	+2.8%
Room Nights	5,290,750	5,588,700	+5.6%
Direct Expenditures	$3,116,791,500	$3,272,030,100	+5.0%
Total Economic Impact	$5,061,669,400	$5,313,776,900	+5.0%
Occupancy	65.2%	65.6%	+0.6%
ADR	$142.07	$142.83	+0.5%
RevPAR	$92.63	$93.70	+1.2%

THE BEACHES OF
FORT MYERS
AND SANIBEL

downs & st. germain
R E S E A R C H

Jobs, Wages and Taxes Supported by Tourism

	2018	2019	% Change
Direct Jobs	42,477	44,016	+3.6%
Total Jobs[1]	59,275	61,330	+3.5%
Direct Wages	$961,020,000	$1,008,286,100	+4.9%
Total Wages[1]	$1,562,970,000	$1,639,842,000	+4.9%
Direct Local Taxes	$99,780,000	$104,070,400	+4.3%
Total Local Taxes[1]	$180,610,000	$184,427,800	+2.1%
Direct State Taxes	$226,750,000	$232,641,300	+2.6%
Total State Taxes[1]	$336,480,000	$349,016,800	+3.7%

[1]"Total" wages and taxes are greater than "direct" wages and taxes because visitors direct spending is recirculated throughout the Lee County economy as employees and employers buy products and services with visitors' dollars.

THE BEACHES OF FORT MYERS AND SANIBEL

Economic Impact on Destination
Calendar Year 2019

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RESEARCH

Visitor Type

Visitor Type	2018	2019
Visitors in Paid Accommodations	63%	64%
Visitors in Non-Paid Accommodations	37%	32%
Day Trippers	NA	4%

Pre-Visit

Planned trip in advance	2018	2019
1 week or less	4%	7%
2-4 weeks	4%	9%
1-2 months	24%	20%
3-6 months	25%	30%
6 months or more	32%	30%
Not sure	11%	4%

Considered Other Destinations	2018	2019
Yes	17%	15%
No	83%	85%

Pre-Visit

Trip Planning Websites[1]	2018	2019
Airline websites	34%	31%
Search engines	23%	19%
Trip Advisor	21%	17%
Hotel websites	22%	17%
Online Travel Agency	20%	16%
Airbnb, VRBO, HomeAway	14%	14%
Vacation rental websites	14%	11%
Visit Florida	7%	6%
Facebook	8%	6%
www.FortMyers-Sanibel.com	9%	6%
Beaches of Fort Myers & Sanibel Social Media	NA	5%
Travel reviews, blogs, stories, etc.	NA	4%
Instagram	NA	2%
YouTube, Hulu, Pandora	NA	2%
Other	9%	7%
None/Don't visit websites	20%	24%

[1]Multiple responses permitted.

Pre-Visit
Calendar Year 2019

Pre-Visit

Information Requests[1]	2018	2019
Call hotel/motel/condo	7%	8%
Visitor guide	3%	3%
Call local Chamber of Commerce	1%	2%
Fort Myers-Sanibel E-newsletter	1%	1%
Call VCB	1%	1%
None/Did not request info	82%	81%
Other	8%	6%

[1]Multiple responses permitted.

Pre-Visit
Calendar Year 2019

Pre-Visit

Recall of Lee County Promotions	2018	2019
Yes	40%	32%
No	41%	54%
Can't recall	18%	14%

Characteristics influencing decision to visit Lee County (top 2 boxes)	2018	2019
Warm weather	85%	88%
Peaceful/relaxing	81%	87%
A safe destination	73%	83%
White sandy beaches	78%	82%
Clean, unspoiled environment	69%	78%
Convenient location	68%	77%
Plenty to see and do	59%	75%
A "family" atmosphere	57%	71%
Value for your travel dollar	61%	69%
Reasonably priced lodging	50%	63%

THE BEACHES OF FORT MYERS AND SANIBEL

downs & st. germain
R E S E A R C H

Pre-Visit

Transportation	2018	2019
Fly	75%	66%
Drive a personal vehicle	21%	29%
Drive a rental vehicle	3%	3%
Drive a RV	1%	1%
Travel by bus	0%	1%
Other	1%	1%

Airport Used	2018	2019
Southwest Florida International	80%	72%
Punta Gorda	8%	10%
Miami International	3%	5%
Ft. Lauderdale international	2%	4%
Orlando International	3%	4%
Tampa International	3%	4%
Other	2%	2%

Travel Party Profile

Visitor Origin	2018	2019
Florida	6%	10%
Southeast	15%	12%
Northeast	22%	21%
Midwest	40%	38%
West	3%	5%
Canada	4%	4%
United Kingdom	2%	2%
Germany	4%	4%
Other Europe	2%	2%
Other international	2%	2%

Visitor Origin	2018	2019
New York City	6%	5%
Chicago	5%	5%
Minneapolis	4%	5%
Cincinnati	3%	4%
Boston	5%	3%
Miami-Ft. Lauderdale	4%	3%
Indianapolis	3%	3%

THE BEACHES OF
FORT MYERS AND SANIBEL

Travel Party Profile
Calendar Year 2019

downs & st. germain
RESEARCH

126

Travel Party Profile

Travel Parties	2018	2019
Mean travel party size	3.2	3.1[1]
Travel with children under age 18	29%	27%

Travel Party Composition	2018	2019
Couple	41%	42%
Family	36%	36%
Single	8%	11%
Group of couples/friends	10%	9%
In a tour group	0%	1%
With business associates	0%	1%

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

THE BEACHES OF
FORT MYERS
AND SANIBEL

Travel Party Profile
Calendar Year 2019

DS downs & st. germain
R E S E A R C H

Travel Party Profile

Marital Status	2018	2019
Married	75%	74%
Single	12%	21%
Other	13%	5%

Age	2018	2019
Average age	53	54

Household Income	2018	2019
Median Income	$105,800	$102,900

Travel Party Profile
Calendar Year 2019

Trip Experience

Length of Stay	2018	2019
Average nights in The Beaches of Fort Myers & Sanibel	10.9	9.9

First time/Repeat Visitors	2018	2019
First-time	18%	23%
Repeat	82%	77%

Trip Experience
Calendar Year 2019

Trip Experience

Activities[1]	2018	2019
Beaches	90%	74%
Relax & unwind	70%	68%
Dining	73%	62%
Shopping	55%	44%
Visiting friends/relatives	35%	33%
Nature, environment, bird watching	24%	32%
Attractions	21%	19%
Biking, hiking etc.	21%	19%
Water sports	22%	19%
Bars, nightlife	17%	15%
Photography	15%	15%
Fishing	11%	13%
Golf or tennis	14%	13%
Special event	NA	8%
Culture	5%	8%
Museums, history, etc.	NA	8%
Sporting event	10%	7%
Guided tours	6%	6%
Spas	NA	4%
Special occasion	NA	4%
Diving/snorkeling	2%	3%
Business conference or meeting	NA	2%
Other	2%	4%

[1]Multiple responses permitted.

THE BEACHES OF FORT MYERS AND SANIBEL

Trip Experience
Calendar Year 2019

downs & st. germain
RESEARCH

Trip Experience

Attractions[1]	2018	2019
Beaches	82%	75%
Fort Myers Beach Pier	40%	35%
Sanibel Lighthouse	27%	30%
Edison & Ford Winter Estates	22%	24%
Miromar Outlets Mall	30%	20%
Sanibel Outlets	23%	19%
J.N. Ding Darling National Wildlife Refuge	13%	14%
Periwinkle Place	12%	12%
Shell Factory and Nature Park	7%	8%
Coconut Point Mall	9%	8%
Bell Tower Shops	12%	8%
Gulf Coast Town Center	10%	7%
Manatee Park	5%	5%
Broadway Palm Dinner Theater	2%	3%
Bailey-Matthews Shell Museum	2%	2%
Barbara B. Mann Performing Arts Hall	1%	2%
Other	5%	6%
None	6%	13%

[1]Multiple responses permitted.

THE BEACHES OF FORT MYERS AND SANIBEL

Trip Experience
Calendar Year 2019

downs & st. germain
R E S E A R C H

Trip Experience

Area stayed	2018	2019
Fort Myers	25%	22%
Sanibel Island	21%	21%
Fort Myers Beach	19%	20%
Cape Coral	12%	16%
Bonita Springs	3%	5%
Captiva Island	1%	3%
North Fort Myers	3%	3%
Estero	3%	2%
Lehigh Acres	1%	1%
Pine Island	1%	1%
Boca Grande/Outer Island	1%	1%
Along I-75	1%	1%
None/not staying overnight	11%	4%

THE BEACHES OF FORT MYERS AND SANIBEL

DS downs & st. germain
R E S E A R C H

Post-Trip Evaluation

Loyalty metrics	2018	2019
Likely to recommend	87%	92%
Likely to return	88%	92%
Likely to return next year	52%	66%

Satisfaction with Accommodations	2018	2019
Exceeded expectations	39%	38%
Met expectations	58%	59%
Did not meet expectations	3%	3%

Post-Trip Evaluation
Calendar Year 2019

Post-Trip Evaluation

Satisfaction with Visit	2018	2019
Very satisfied	54%	68%
Satisfied	39%	28%
Neither	2%	2%
Dissatisfied/Very dissatisfied	1%	1%
Don't know	4%	1%

Satisfaction with Customer Service	2018	2019
Very satisfied	42%	61%
Satisfied	45%	31%
Neither	4%	3%
Dissatisfied/Very dissatisfied	<1%	1%
Don't know	9%	4%

THE BEACHES OF FORT MYERS AND SANIBEL

downs & st. germain
R E S E A R C H

Post-Trip Evaluation

Visitor Concerns[1]	2018	2019
Traffic	29%	30%
Red Tide	22%	18%
Beach seaweed	13%	16%
Insects	12%	14%
Water quality	14%	12%
High prices	9%	10%
Weather	9%	5%
Lack of nightlife	4%	3%
Quality of accommodations	3%	2%
Other	5%	4%
Nothing	30%	29%

[1]Multiple responses permitted.

THE BEACHES OF
FORT MYERS
AND SANIBEL

DS downs & st. germain
R E S E A R C H

Quarterly Comparisons

Economic Impact

Visitor & Lodging Statistics	January – March	April – June	July – September	October – December
Visitors	1,311,900	1,262,500	1,102,500	1,249,500
Room Nights	1,848,200	1,309,000	975,200	1,456,300
Direct Expenditures	$1,251,828,600	$727,686,800	$548,970,200	$743,544,500
Total Economic Impact	$2,032,969,600	$1,181,763,400	$891,527,600	$1,207,516,300
Occupancy	86.3%	63.6%	45.6%	63.1%
ADR	$176.26	$130.52	$122.54	$137.39
RevPAR	$152.11	$83.01	$55.93	$86.69

Economic Impact
Calendar Year 2019

Jobs, Wages and Taxes Supported by Tourism

	January – March	April – June	July – September	October – December
Direct Jobs	16,851	9,795	7,378	9,992
Total Jobs[1]	23,423	13,616	10,317	13,974
Direct Wages	$391,224,900	$227,418,700	$165,493,000	$224,149,500
Total Wages[1]	$639,734,400	$371,877,000	$276,479,600	$374,473,700
Direct Local Taxes	$41,435,500	$23,213,200	$16,743,600	$22,678,100
Total Local Taxes[1]	$71,763,800	$41,716,300	$30,133,600	$40,814,100
Direct State Taxes	$89,005,000	$51,738,500	$39,031,800	$52,866,000
Total State Taxes[1]	$133,769,400	$77,760,000	$58,395,100	$79,092,300

[1]"Total" wages and taxes are greater than "direct" wages and taxes because visitors direct spending is recirculated throughout the Lee County economy as employees and employers buy products and services with visitors' dollars.

THE BEACHES OF FORT MYERS AND SANIBEL

Economic Impact on Destination
Calendar Year 2019

downs & st. germain
R E S E A R C H

Visitor Type

Visitor Type	January – March	April – June	July – September	October – December
Visitors in Paid Accommodations	60%	62%	66%	68%
Visitors in Non-Paid Accommodations	35%	35%	31%	27%
Day Trippers	5%	3%	3%	5%

Economic Impact
Calendar Year 2019

Pre-Visit

Planned trip in advance	January – March	April – June	July – September	October – December
1 week or less	8%	6%	8%	6%
2-4 weeks	8%	7%	11%	9%
1-2 months	18%	23%	25%	15%
3-6 months	29%	30%	28%	34%
6 months or more	37%	28%	24%	30%
Not sure	0%	6%	4%	6%

Considered Other Destinations	January – March	April – June	July – September	October – December
Yes	17%	17%	16%	10%
No	83%	83%	84%	90%

Pre-Visit
Calendar Year 2019

Pre-Visit

Trip Planning Websites[1]	January – March	April – June	July – September	October – December
Airline websites	24%	32%	34%	36%
Search engines	20%	19%	20%	16%
Trip Advisor	18%	16%	17%	17%
Hotel websites	15%	15%	20%	17%
Booking websites	14%	16%	18%	15%
Airbnb, VRBO, HomeAway	11%	16%	15%	15%
Vacation rental websites	10%	11%	11%	11%
Facebook	6%	5%	7%	6%
www.FortMyers-Sanibel.com	5%	7%	7%	6%
Visit Florida	4%	5%	6%	7%
Beaches of Fort Myers & Sanibel Social Media	3%	4%	7%	6%
Travel reviews, blogs, stories, etc.	3%	4%	5%	4%
Instagram	2%	2%	4%	1%
YouTube, Hulu, Pandora	2%	2%	3%	1%
Other	8%	7%	9%	6%
None/Don't visit websites	31%	28%	20%	18%

[1]Multiple responses permitted.

THE BEACHES OF FORT MYERS AND SANIBEL

DS downs & st. germain
R E S E A R C H

Pre-Visit

Information Requests[1]	January – March	April – June	July – September	October – December
Call hotel/motel/condo	8%	7%	8%	10%
Visitor guide	2%	3%	3%	3%
Call local Chamber of Commerce	2%	2%	2%	2%
Call VCB	2%	2%	2%	1%
Fort Myers-Sanibel E-newsletter	1%	1%	2%	2%
Other	8%	5%	5%	4%
None/Did not request info	79%	82%	82%	79%

[1]Multiple responses permitted.

THE BEACHES OF
FORT MYERS
AND SANIBEL

Pre-Visit
Calendar Year 2019

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Pre-Visit

Recall of Lee County Promotions	January – March	April – June	July – September	October – December
Yes	35%	31%	31%	30%
No	50%	55%	55%	56%
Can't recall	14%	14%	14%	15%

Characteristics influencing decision to visit Lee County (top 2 boxes)	January – March	April – June	July – September	October – December
Warm weather	92%	91%	78%	89%
Peaceful/relaxing	86%	90%	86%	88%
A safe destination	80%	85%	82%	84%
White sandy beaches	80%	85%	80%	82%
Clean, unspoiled environment	75%	80%	78%	80%
Convenient location	76%	79%	75%	79%
Plenty to see and do	73%	77%	72%	76%
A "family" atmosphere	64%	75%	71%	73%
Value for your travel dollar	61%	75%	67%	74%
Reasonably priced lodging	51%	68%	67%	69%

THE BEACHES OF FORT MYERS AND SANIBEL

downs & st. germain
R E S E A R C H

Pre-Visit

Transportation	January – March	April – June	July – September	October – December
Fly	64%	69%	60%	70%
Drive a personal vehicle	32%	26%	35%	24%
Drive a rental vehicle	2%	2%	3%	4%
Drive a RV	2%	1%	1%	1%
Travel by bus	0%	1%	0%	1%
Other	<1%	1%	1%	1%

Airport Used	January – March	April – June	July – September	October – December
Southwest Florida International	80%	74%	66%	69%
Miami International	2%	5%	9%	4%
Ft. Lauderdale international	2%	3%	3%	9%
Orlando International	3%	3%	5%	4%
Tampa International	2%	3%	6%	4%
Punta Gorda	9%	11%	10%	10%
Other	2%	2%	1%	1%

Travel Party Profile

Visitor Origin	January – March	April – June	July – September	October – December
Florida	4%	9%	17%	10%
Southeast	7%	12%	13%	16%
Northeast	27%	21%	18%	18%
Midwest	47%	36%	31%	37%
West	3%	5%	5%	6%
Canada	8%	4%	2%	3%
United Kingdom	1%	3%	3%	2%
Germany	1%	5%	5%	5%
Other Europe	1%	3%	3%	2%
Other international	1%	1%	3%	1%

Travel Party Profile
Calendar Year 2019

Travel Party Profile

Visitor Origin	January – March	April – June	July – September	October – December
New York City	6%	4%	6%	5%
Chicago	5%	5%	5%	4%
Minneapolis	9%	4%	2%	3%
Cincinnati	3%	2%	4%	6%
Boston	5%	4%	3%	2%
Miami-Ft. Lauderdale	1%	3%	6%	3%
Indianapolis	3%	2%	2%	3%
Detroit	3%	3%	1%	3%
Cleveland	3%	3%	2%	2%
Philadelphia	3%	2%	2%	2%
Washington DC-Baltimore	3%	2%	2%	2%
Tampa-St. Pete-Clearwater	1%	3%	4%	1%
Naples	2%	2%	2%	2%
Green Bay-Appleton	2%	2%	1%	2%
Columbus	2%	1%	2%	2%
St. Louis	1%	2%	2%	2%
Atlanta	1%	1%	2%	2%
Milwaukee	2%	2%	1%	1%
Buffalo-Rochester	2%	1%	1%	2%
Pittsburgh	1%	1%	2%	1%
Lakeland	1%	1%	2%	1%
Denver	1%	1%	2%	1%

THE BEACHES OF
FORT MYERS
AND SANIBEL

Travel Party Profile
Calendar Year 2019

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Travel Party Profile

Travel Parties	January – March	April – June	July – September	October – December
Mean travel party size[1]	2.9	3.2	3.5	2.9
Travel with children under age 18	23%	29%	36%	21%

Travel Party Composition	January – March	April – June	July – September	October – December
Couple	49%	42%	33%	44%
Family	29%	37%	47%	30%
Group of couples/friends	11%	10%	7%	9%
Single	9%	9%	12%	15%
In a tour group	1%	0%	0%	1%
With business associates	1%	0%	1%	2%

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

THE BEACHES OF FORT MYERS AND SANIBEL

Travel Party Profile
Calendar Year 2019

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Travel Party Profile

Marital Status	January – March	April – June	July – September	October – December
Married	75%	77%	72%	73%
Single	20%	19%	25%	22%
Other	5%	4%	3%	5%

Age	January – March	April – June	July – September	October – December
Average age	59	53	50	52

Household Income	January – March	April – June	July – September	October – December
Median Income	$100,000	$94,400	$100,000	$114,500

THE BEACHES OF FORT MYERS AND SANIBEL

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R E S E A R C H

Trip Experience

Length of Stay	January – March	April – June	July – September	October – December
Average nights in The Beaches of Fort Myers & Sanibel	13.4	10.1	7.7	7.8

First time/Repeat Visitors	January – March	April – June	July – September	October – December
First-time	23%	25%	29%	15%
Repeat	77%	75%	70%	85%

Trip Experience
Calendar Year 2019

Trip Experience

Activities[1]	January – March	April – June	July – September	October – December
Beaches	75%	78%	75%	67%
Relax & unwind	69%	77%	65%	61%
Dining	62%	64%	65%	60%
Shopping	48%	42%	46%	40%
Visiting friends/relatives	39%	36%	26%	29%
Nature, environment, bird watching	24%	31%	38%	38%
Attractions	19%	19%	18%	21%
Biking, hiking etc.	21%	20%	17%	18%
Water sports	23%	14%	22%	16%
Bars, nightlife	18%	17%	13%	12%
Photography	12%	16%	16%	15%
Fishing	14%	15%	13%	11%
Golf or tennis	19%	10%	9%	12%
Special event	6%	9%	9%	9%
Museums, history, etc.	6%	9%	9%	9%
Culture	10%	8%	5%	9%
Sporting event	12%	4%	5%	6%
Guided tours	7%	6%	6%	7%
Spas	2%	4%	4%	4%
Diving/snorkeling	2%	4%	4%	2%
Special occasion	2%	3%	3%	3%
Business conference or meeting	1%	2%	2%	2%
Volunteering	0%	1%	1%	1%
Other	4%	4%	5%	3%

[1]Multiple responses permitted.

Trip Experience
Calendar Year 2019

Trip Experience

Attractions[1]	January – March	April – June	July – September	October – December
Beaches	75%	75%	75%	75%
Fort Myers Beach Pier	39%	37%	33%	32%
Sanibel Lighthouse	26%	32%	32%	30%
Edison & Ford Winter Estates	24%	24%	24%	24%
Miromar Outlets Mall	20%	20%	20%	20%
Sanibel Outlets	19%	19%	19%	19%
J.N. Ding Darling National Wildlife Refuge	16%	14%	12%	16%
Periwinkle Place	10%	12%	11%	14%
Bell Tower Shops	10%	8%	7%	7%
Coconut Point Mall	9%	9%	8%	6%
Shell Factory and Nature Park	8%	8%	7%	8%
Gulf Coast Town Center	7%	6%	8%	6%
Manatee Park	8%	5%	3%	3%
Broadway Palm Dinner Theater	3%	3%	2%	3%
Bailey-Matthews Shell Museum	3%	3%	2%	2%
Barbara B. Mann Performing Arts Hall	4%	2%	1%	2%
Other	8%	5%	7%	4%
None	12%	14%	15%	10%

[1]Multiple responses permitted.

Trip Experience

Area stayed	January – March	April – June	July – September	October – December
Fort Myers	26%	20%	17%	22%
Sanibel Island	16%	23%	25%	22%
Fort Myers Beach	19%	19%	21%	20%
Cape Coral	14%	16%	18%	13%
Bonita Springs	7%	5%	5%	5%
Captiva Island	2%	3%	4%	2%
North Fort Myers	3%	2%	2%	2%
Estero	1%	2%	3%	2%
Lehigh Acres	2%	1%	1%	1%
Along I-75	1%	1%	1%	1%
Pine Island	1%	1%	1%	1%
Boca Grande/Outer Island	1%	1%	1%	1%
None/not staying overnight	5%	5%	2%	8%

Post-Trip Evaluation

Loyalty metrics	January – March	April – June	July – September	October – December
Likely to recommend	92%	93%	91%	93%
Likely to return	89%	91%	91%	93%
Likely to return next year	75%	66%	60%	63%

Satisfaction with Accommodations	January – March	April – June	July – September	October – December
Exceeded expectations	33%	41%	41%	38%
Met expectations	63%	56%	57%	60%
Did not meet expectations	4%	3%	3%	2%

THE BEACHES OF FORT MYERS AND SANIBEL

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Post-Trip Evaluation

Satisfaction with Visit	January – March	April – June	July – September	October – December
Very satisfied	64%	72%	69%	67%
Satisfied	32%	23%	26%	29%
Neither	2%	2%	1%	2%
Dissatisfied/Very dissatisfied	1%	1%	1%	1%
Don't know	1%	2%	3%	2%

Satisfaction with Customer Service	January – March	April – June	July – September	October – December
Very satisfied	54%	66%	63%	60%
Satisfied	35%	26%	30%	33%
Neither	4%	3%	3%	2%
Dissatisfied/Very dissatisfied	1%	1%	1%	0%
Don't know	6%	4%	3%	4%

THE BEACHES OF FORT MYERS AND SANIBEL

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RESEARCH

Post-Trip Evaluation

Visitor Concerns[1]	January – March	April – June	July – September	October – December
Traffic	56%	30%	9%	20%
Nothing	22%	30%	33%	32%
Red Tide	13%	13%	20%	25%
Beach seaweed	14%	20%	19%	12%
Insects	9%	17%	19%	13%
Water quality	7%	10%	17%	16%
High prices	14%	10%	8%	8%
Weather	3%	5%	8%	6%
Other	2%	5%	5%	3%
Lack of nightlife	3%	3%	4%	2%
Quality of accommodations	3%	2%	2%	2%

[1]Multiple responses permitted.

THE BEACHES OF FORT MYERS AND SANIBEL

downs & st. germain
R E S E A R C H

Methodology

Methodology

- Economic Impact of tourism in Lee County is derived from:
  - Visitor Tracking Study
    - Internet survey & in-person interviews in public areas, hotels, & at events around Lee County
    - Sample size: 4,962 completed interviews
    - Target individuals: Calendar Year 2019 visitors to Lee County
    - Data Collection: January 2019 – December 2019
  - Occupancy Study
    - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc., and the STR Report
    - Sample Size – quarterly survey data from 327 properties reporting to DSG, and 325 properties reporting to STR
  - 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

- **4,962** visitor interviews were completed in the following areas:

1,222 — Fort Myers Beach: The Pier, Times Square, Outrigger Beach Resort

1,781 — Fort Myers: Centennial Park, RSW, Edison-Ford Winter Estates, Hampton Inn & Suites Fort Myers

1,130 — Sanibel: Lighthouse Beach, Sanibel Moorings Resort, Sundial Beach Resort & Spa, Castaways Cottages, Beachview Cottages, West Wind Inn, Tween Waters,

641 — Cape Coral/North Fort Myers: Yacht Club Community Park, The Shell Factory and Nature Park, Tarpon Lodge (Pine Island)

188 — Bonita Springs: Bonita Beach, Estero Bay Aquatic Preserve

THE BEACHES OF FORT MYERS AND SANIBEL

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The Beaches of Fort Myers & Sanibel

Lee County VCB

Calendar Year 2019
Visitor Tracking, Occupancy & Economic Impact Study

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