The Beaches of Fort Myers & Sanibel

Lee County VCB

Calendar Year 2020

Visitor Tracking, Occupancy & Economic Impact Study

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THE BEACHES OF FORT MYERS AND SANIBEL

downs & st. germain RESEARCH

Introduction

STUDY OBJECTIVES: MAP THE VISITOR JOURNEY

Pre-Visit

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

Travel Party Profile

- Visitor origin
- Party size
- Party composition
- Demographics

Trip Experience

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

Post-Trip Evaluation

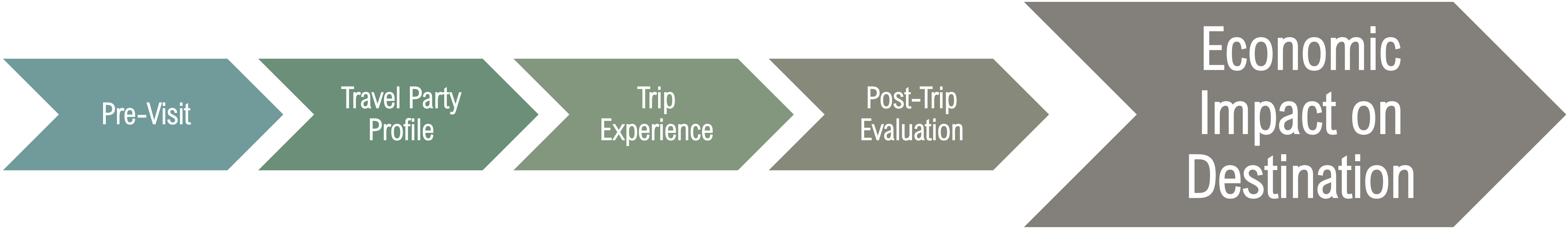
- Likelihood of recommending
- Likelihood of returning
- Satisfaction with overall stay & customer service
- Evaluation of destination attributes
- Visitor concerns
- Painting a picture for others

Economic Impact on Destination

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

Executive Summary

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION



DIRECT SPENDING

Visitors who traveled to The Beaches of Fort Myers & Sanibel in CY 2020 spent

$2,631,887,000

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

A decrease of **19.6%.**

TOURISM MATTERS TO LEE COUNTY

Visitor spending in CY 2020 generated a total economic impact of

$4,274,184,500

in The Beaches of Fort Myers & Sanibel.

A decrease of **19.6%.**

VISITORS

The Beaches of Fort Myers & Sanibel attracted

3,391,700

visitors in CY 2020.

A decrease of **31.2%.**

ROOM NIGHTS

The Beaches of Fort Myers & Sanibel visitors generated

4,413,800

room nights in paid accommodations in CY 2020.

A decrease of **21.0%.**

JOBS & WAGES

Tourism in The Beaches of Fort Myers & Sanibel supported

49,006 (-20.1%)

local jobs in CY 2020, generating

$1,324,423,200 (-19.2%)

in wages and salaries.

VISITORS SUPPORT JOBS

An additional Lee County job
is supported by every

97

visitors

TOURIST DEVELOPMENT TAX

Paid accommodations and vacation rentals by visitors to The Beaches of Fort Myers & Sanibel in CY 2020 generated

$37,400,615

in TDT collected

A decrease of **14.1%.**

HOUSEHOLD SAVINGS[1]

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

$1,537

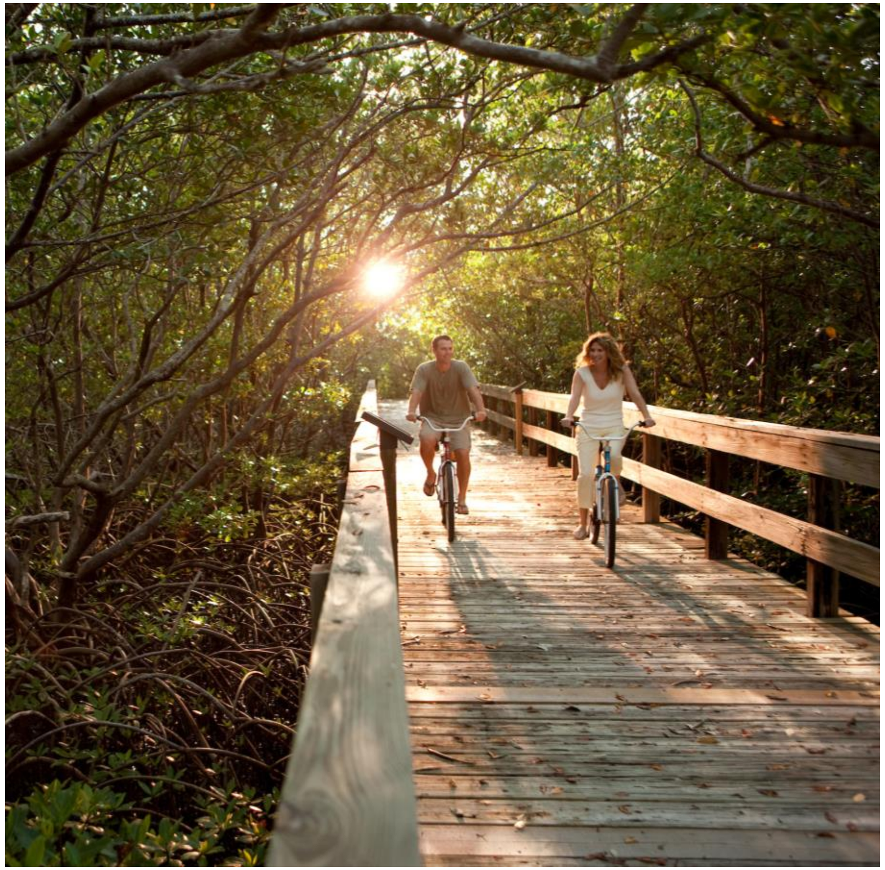
per household every year in state and local taxes

MARKETING SPENDING

Every dollar spent by the Lee County VCB on marketing[1] is associated with

$264

in visitor spending within Lee County



[1]The Lee County VCB's marketing budget for FY2020 was $9,982,140.

CALENDAR YEAR LODGING STATISTICS

52.9%	$144.75	$76.57
Occupancy	ADR	RevPAR
↓19.4%	↑ 1.3%	↓18.3%

VISITOR JOURNEY: PRE-VISIT

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

TRIP PLANNING

→1 in 2 visitors planned their trip to The Beaches of Fort Myers & Sanibel at least 3 months in advance

→2 in 5 visitors requested information from hotels, the VCB, etc., to plan their trip

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

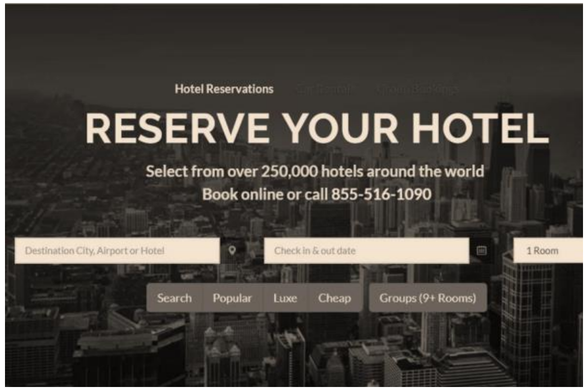
TRIP PLANNING: TOP WEBSITES USED

→ Over 5 in 6 visitors used websites to plan their trip to The Beaches of Fort Myers & Sanibel

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

28% Airline websites

25% Search engines



20% Hotel websites

19% Booking websites

[1]Multiple responses permitted.

TOP TRIP INFLUENCERS

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

92% Peaceful/relaxing

90% Warm weather

88% 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.

TOP REASONS FOR VISITING

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

45% Vacation

43% Beach

42% Relax & unwind

22% Visit friends & relatives

[1]Three responses permitted.

PROMOTIONS

→ 38% of visitors recalled promotions in the past 6 months for The Beaches of Fort Myers & Sanibel

→ Top sources of recall include[1]:

32% Social media

31% Internet

22% TV

[1]Multiple responses permitted.

BOOKING

→ Visitors used the following to book their trips:

42% Directly with hotel

15% Online travel agency

14% VRBO, HomeAway

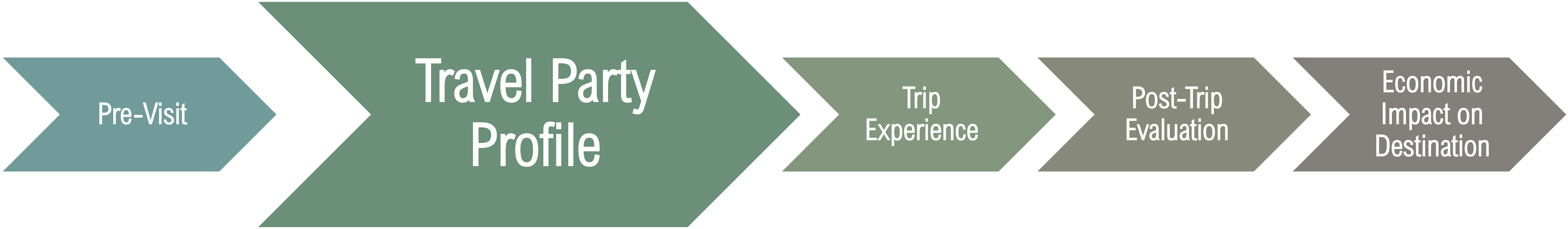
12% Vacation rental company

12% Airbnb

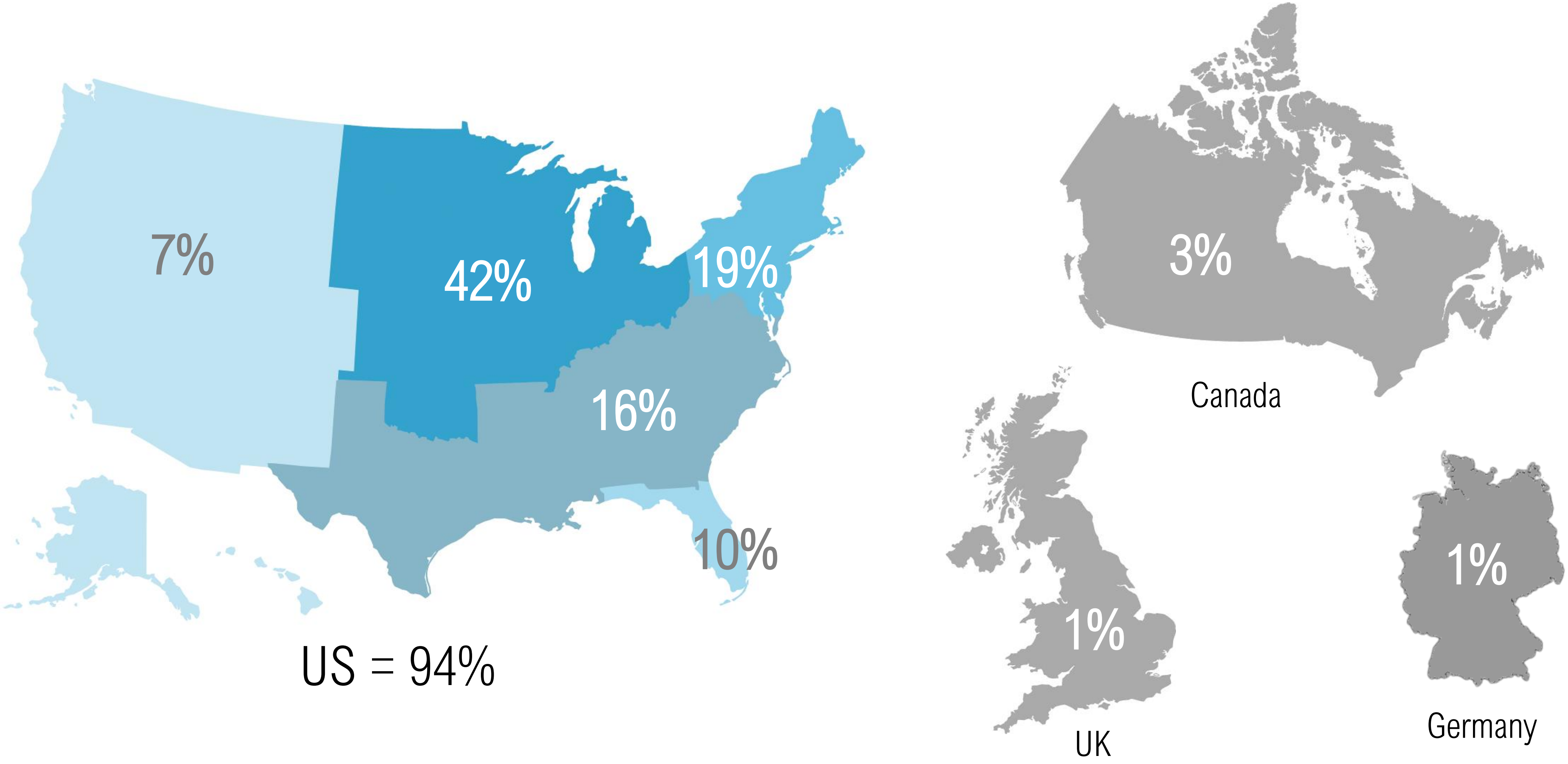
TRANSPORTATION

- → 64% of visitors flew to The Beaches of Fort Myers & Sanibel
- → 51% of all visitors flew to The Beaches of Fort Myers & Sanibel flew via RSW

VISITOR JOURNEY: TRAVEL PARTY PROFILE



ORIGIN



TOP ORIGIN MARKETS

6% New York City

4% Chicago

4% Miami – Ft. Lauderdale

4% Detroit

4% Minneapolis – St. Paul

TRAVEL PARTY SIZE AND COMPOSITION

→ Visitors traveled in a party composed of 3.4 people[1]

→ 29% traveled with children under the age of 18

→ 39% traveled as a couple, while 38% of visitors traveled as a family

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

DEMOGRAPHIC PROFILE

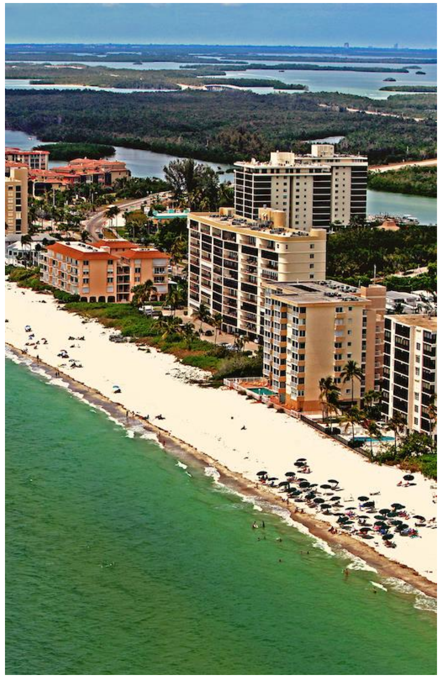
2020 Visitors:

- Average age of 51 years old
- Median household income of $109,700
- Married (74%)
- College educated (62%)
- Caucasian/white (77%)
- Slightly more likely to be female (53%)

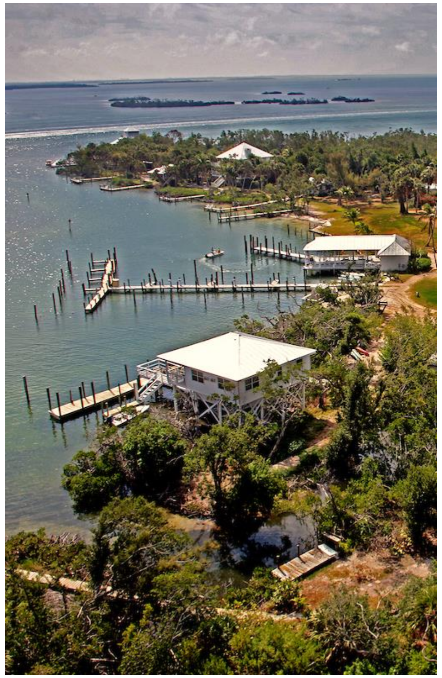
VISITOR JOURNEY: TRIP EXPERIENCE

ACCOMMODATIONS

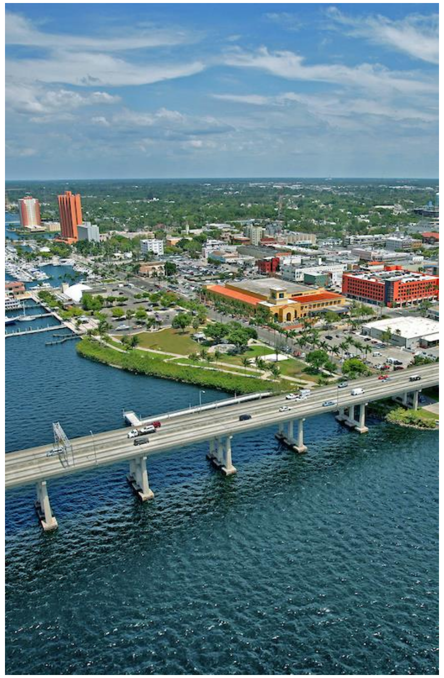
36% Hotel/Motel/Resort/B&B



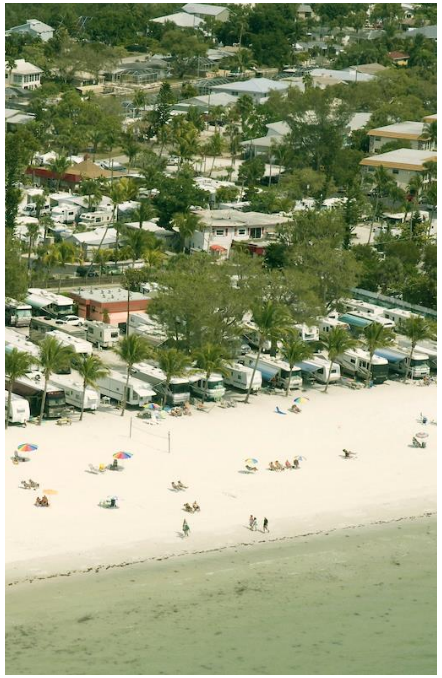
32% Condo/Vacation Rental



27% Non-paid Accommodations



3% Day trippers



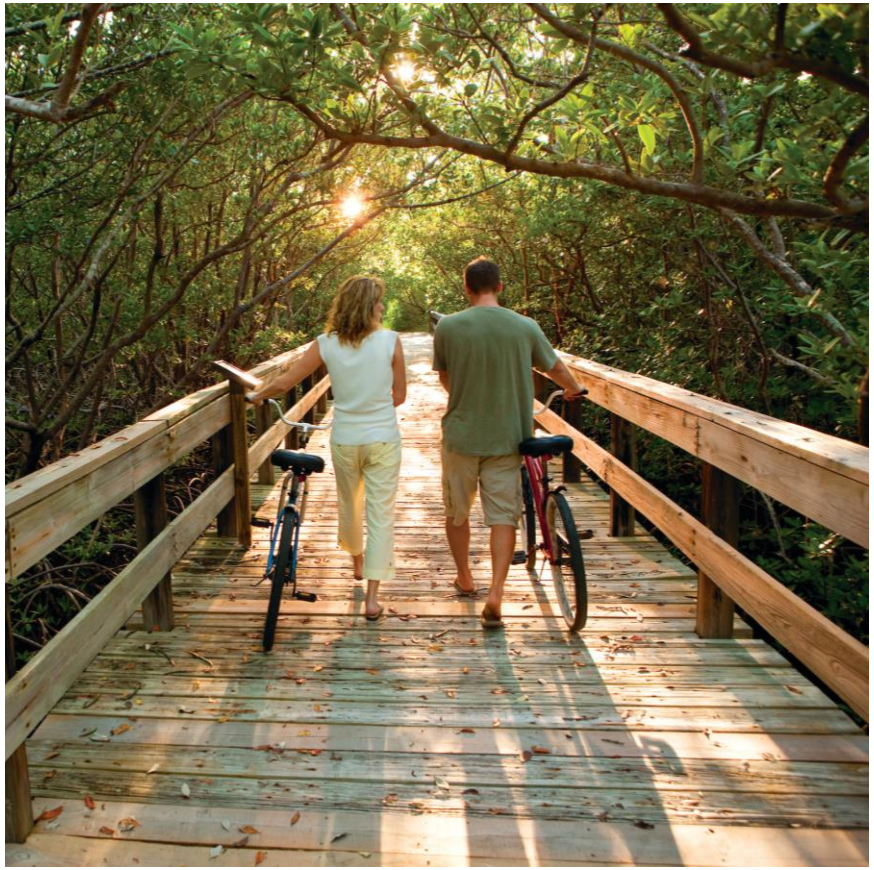
2% RV Park/Campground

LENGTH OF STAY & NUMBER OF TIMES IN DESTINATION

→Visitors[1] spent 8.5 nights in The Beaches of Fort Myers & Sanibel

→24% were first time visitors

→24% have visited more than 10 times



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

TOP VISITOR ACTIVITIES

→ Top visitor activities include[1]:

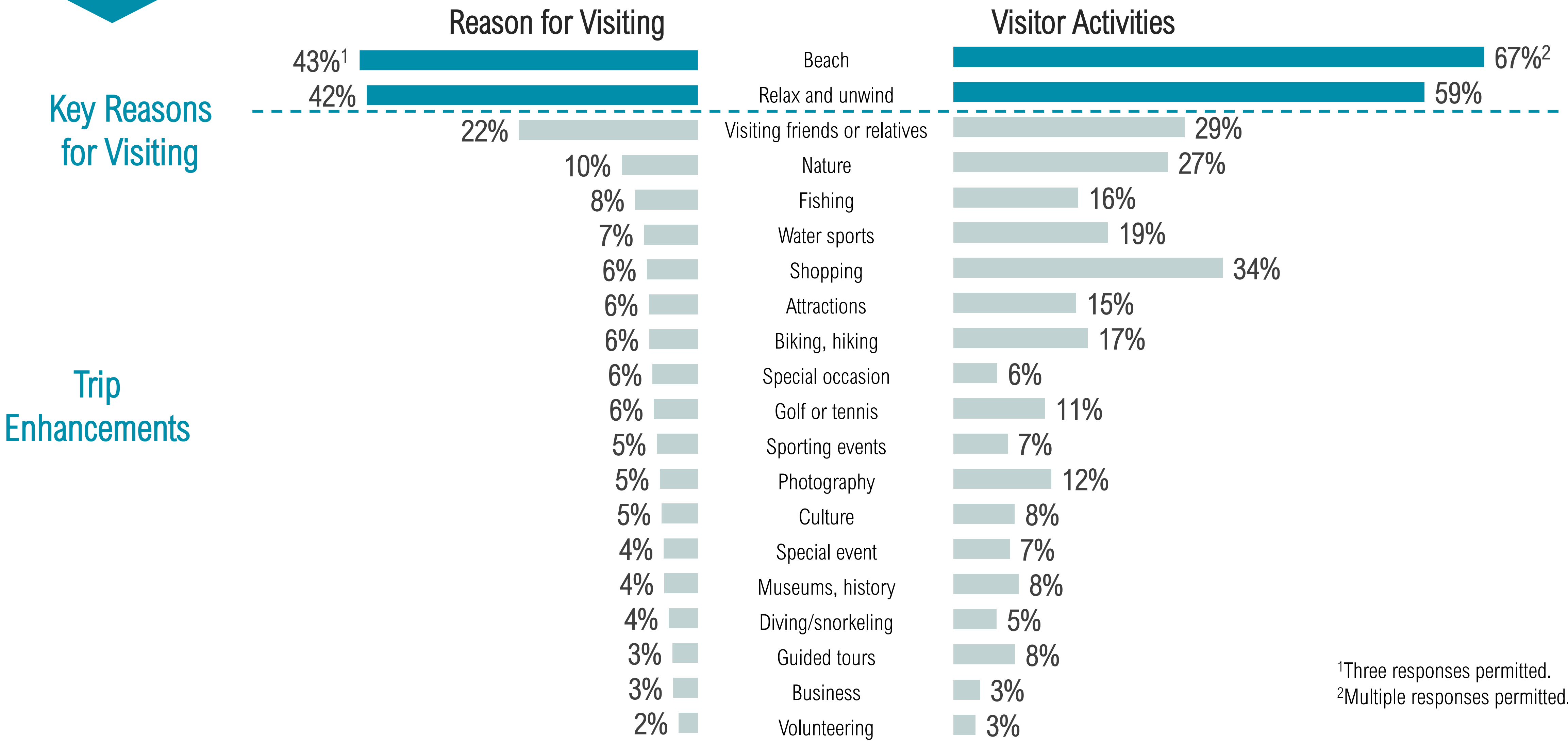
67% Beaches

59% Relax & unwind

51% Dining

[1]Multiple responses permitted.

REASON FOR VISITING VS. VISITOR ACTIVITIES



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

TOP ATTRACTIONS VISITED[1]

67% Beaches

33% Fort Myers Beach Pier

30% Sanibel Lighthouse

19% Sanibel Outlets

[1]Multiple responses permitted.

TOP COMMUNITIES STAYED

23% Sanibel Island

22% Fort Myers Beach

18% Fort Myers

14% Cape Coral

VISITOR JOURNEY: POST-TRIP EVALUATION

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

SATISFACTION

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

→93% of visitors are likely to return

→68% of visitors are likely to return next year

→41% of visitors said paid accommodations exceeded their expectations

SATISFACTION

→ 97% of visitors were satisfied or very satisfied with their overall visit to The Beaches of Fort Myers & Sanibel

→ 94% 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]:

97% Warm weather

97% 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.

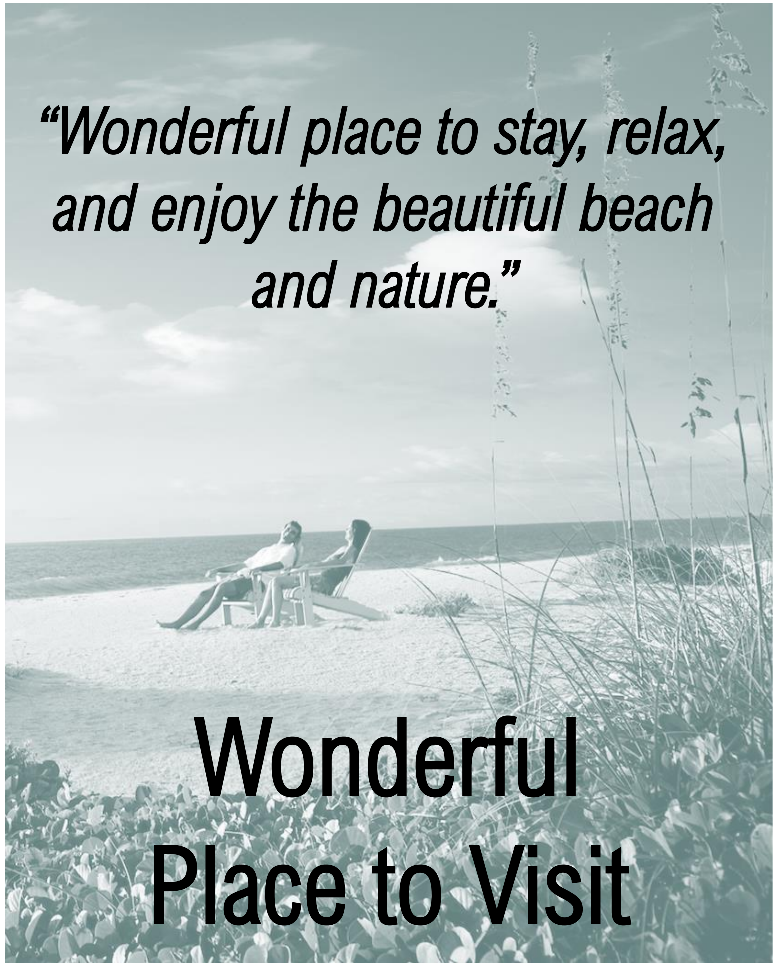
VISITOR CONCERNS

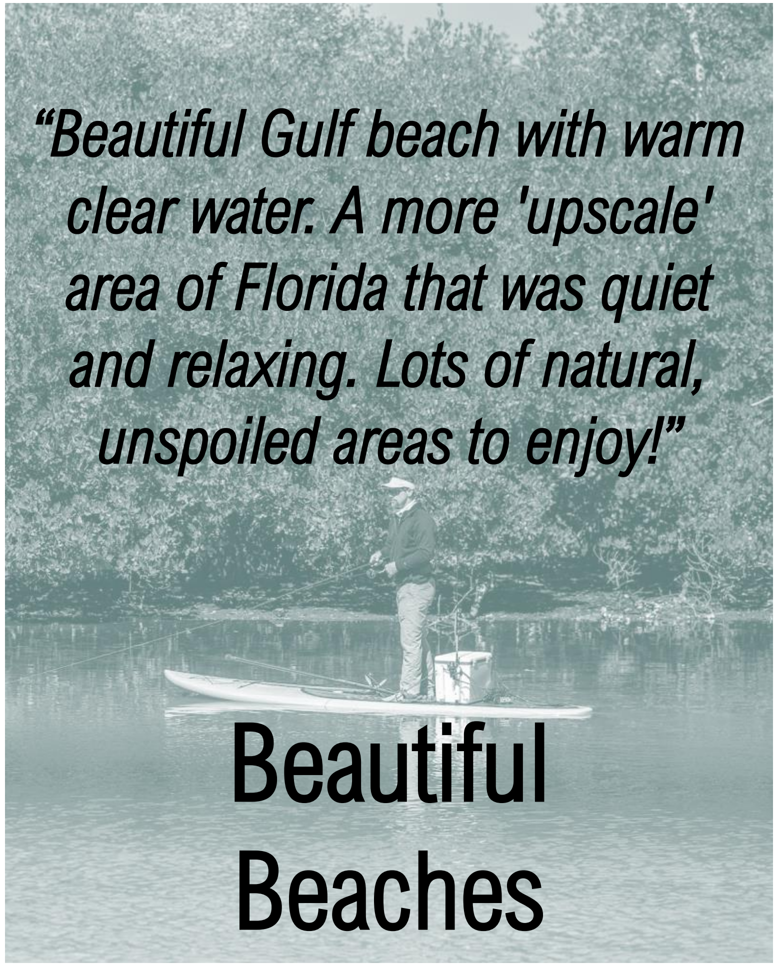
→1 in 3 visitors were concerned about traffic in The Beaches of Fort Myers & Sanibel

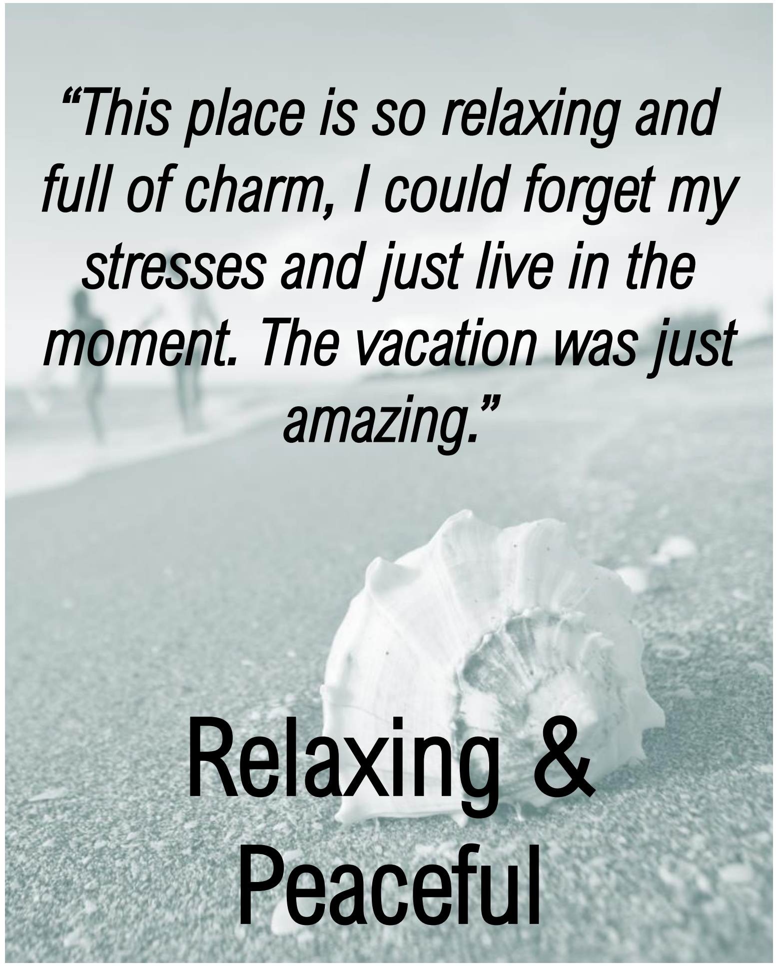
→23% were concerned about insects

→24% of visitors had no concerns about the destination

AREA DESCRIPTIONS







Detailed Findings

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

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

TOURISM SNAPSHOT: CALENDAR YEAR 2020[1]

Visitor & Lodging Statistics	2019	2020	% Change
Visitors	4,926,400	3,391,700	-31.2%
Room Nights	5,588,700	4,413,800	-21.0%
Direct Expenditures[2]	$3,272,030,100	$2,631,887,000	-19.6%
Total Economic Impact[3]	$5,313,776,900	$4,274,184,500	-19.6%
TDT	$43,493,514	$37,400,615	-14.1%

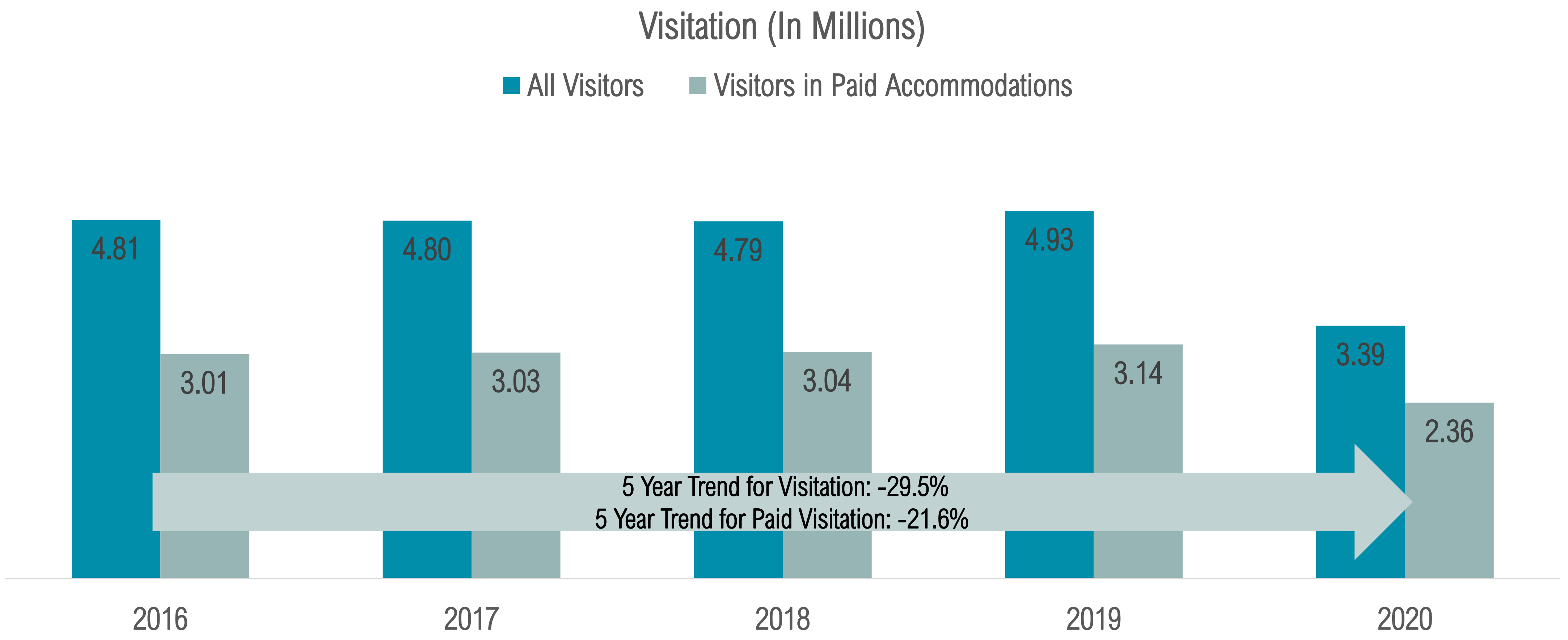
[1] Year-over-year differences due to the COVID-19 crisis. Number of visitors is down more than the number of room nights and direct expenditures because visitors staying in paid accommodations comprised a larger percentage of 2020 visitors.
[2] Includes: accommodations, restaurants, entertainment, shopping, 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.

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM

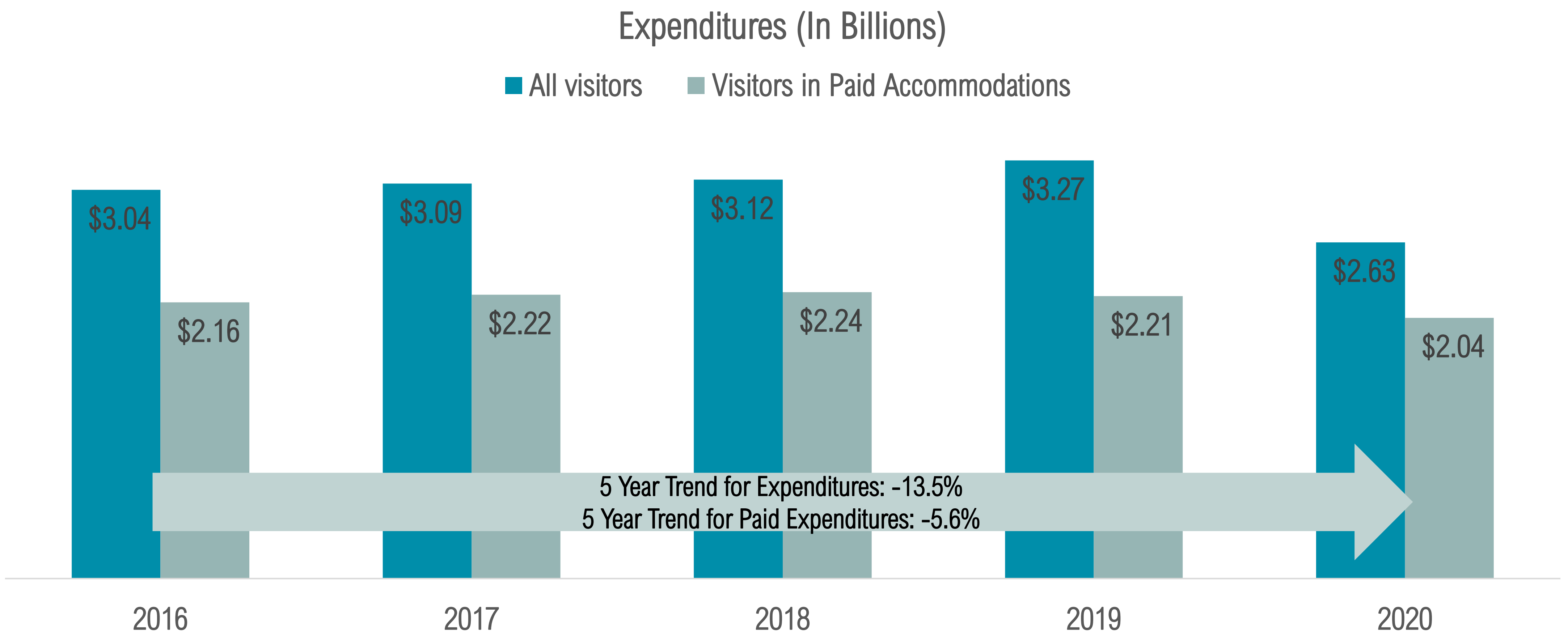
	2019	2020	% Change
Direct Jobs	44,016	35,060	-20.3%
Total Jobs[1]	61,330	49,006	-20.1%
Direct Wages	$1,008,286,100	$790,077,400	-21.6%
Total Wages[1]	$1,639,842,000	$1,324,423,200	-19.2%
Visitors to support one additional job	112	97	-13.4%
Household Savings on State & Local Taxes	$1,961	$1,537	-21.6%
Marketing ROI	$247	$264	+6.9%

[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.

5 YEAR TREND: VISITATION

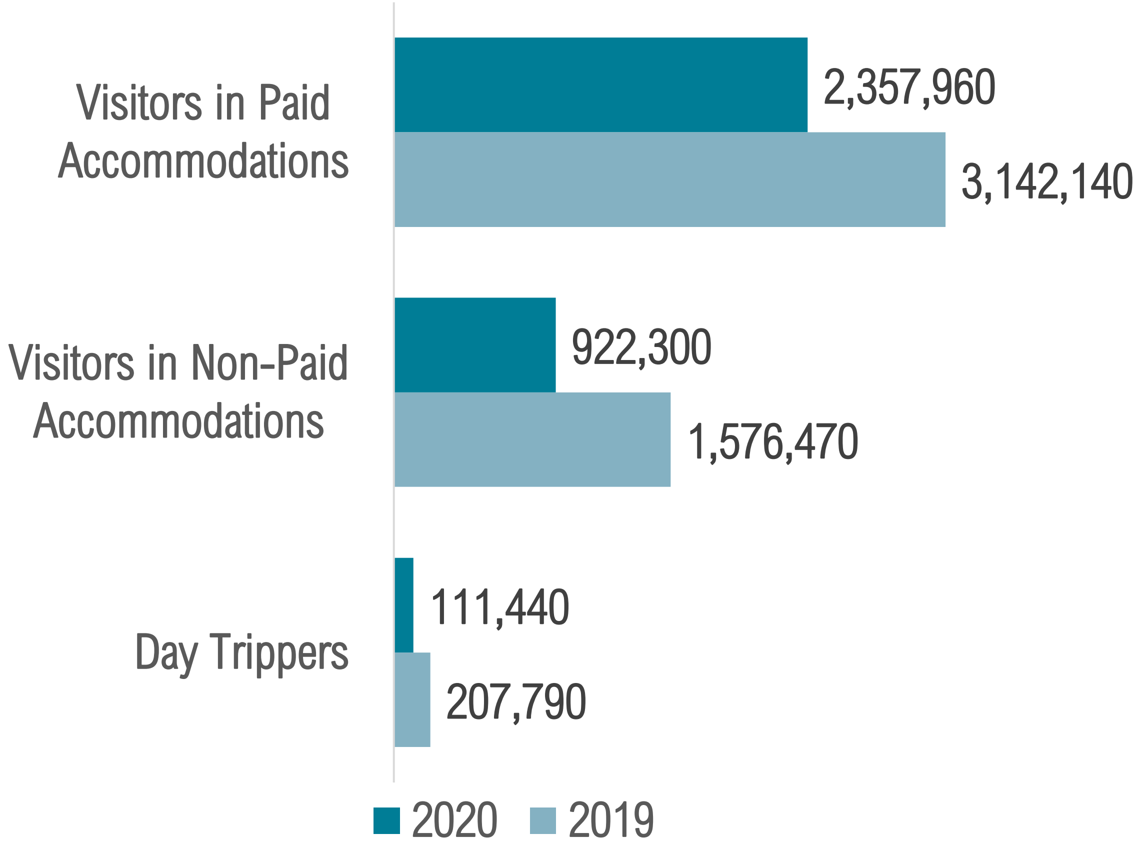


5 YEAR TREND: VISITOR SPENDING



NUMBER OF VISITORS

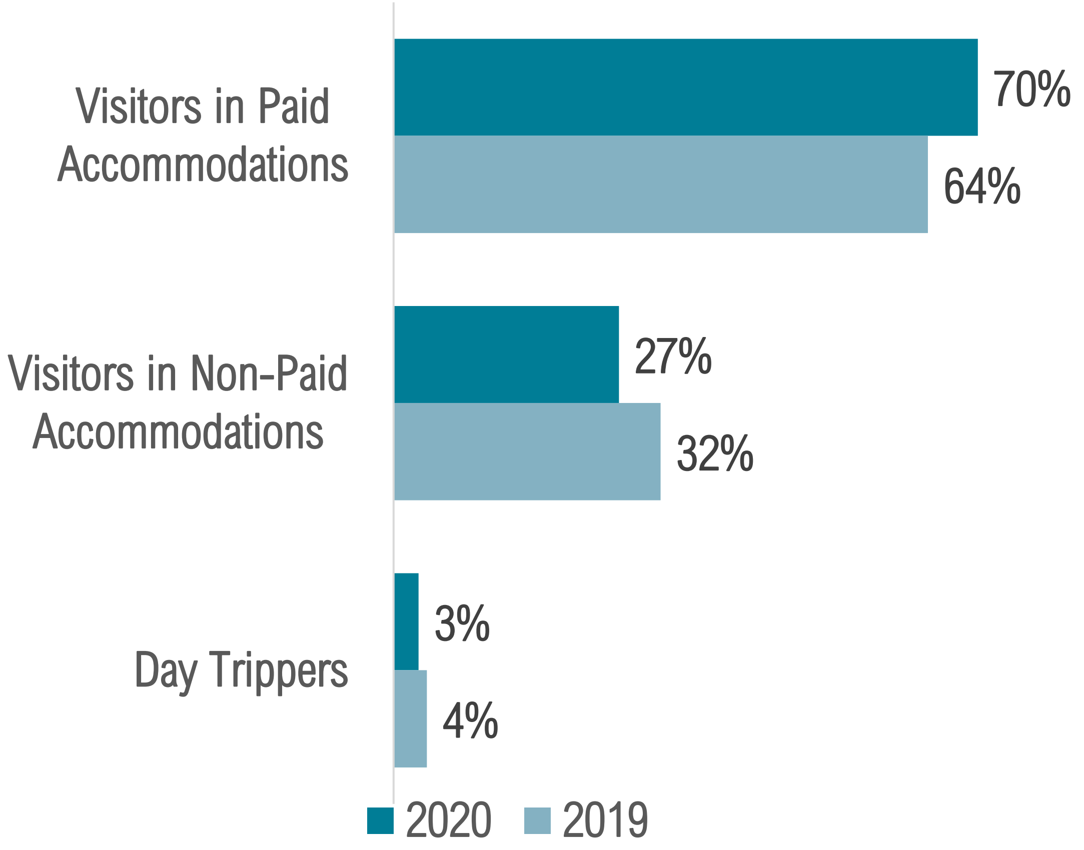
There were **3,391,700**[1] **visitors** to The Beaches of Fort Myers & Sanibel in 2020 (-31.2% from 2019).



[1]Sources: Visitor Tracking Study & Occupancy Survey

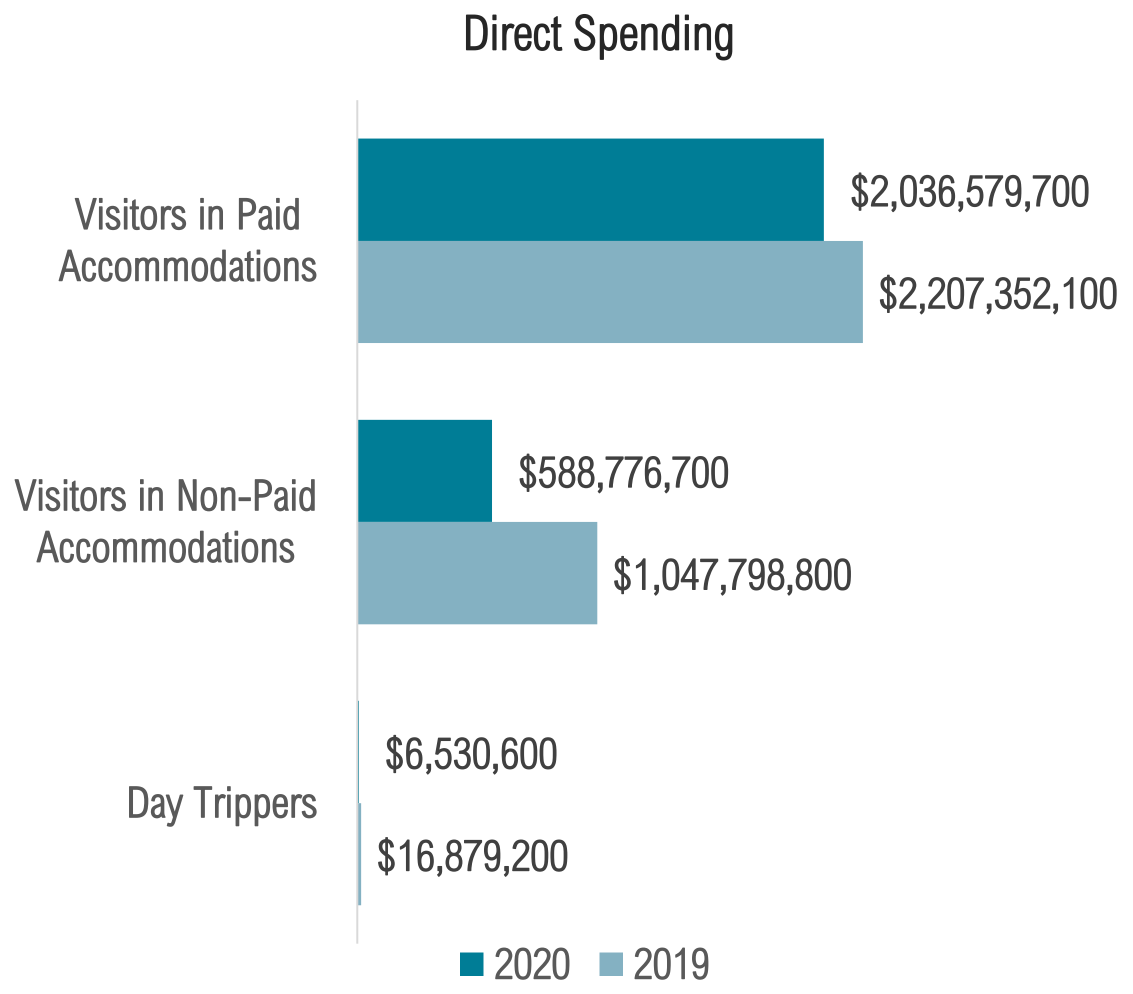
VISITOR TYPE

Visitors staying in **paid accommodations** accounted for **7 in 10** visitors.



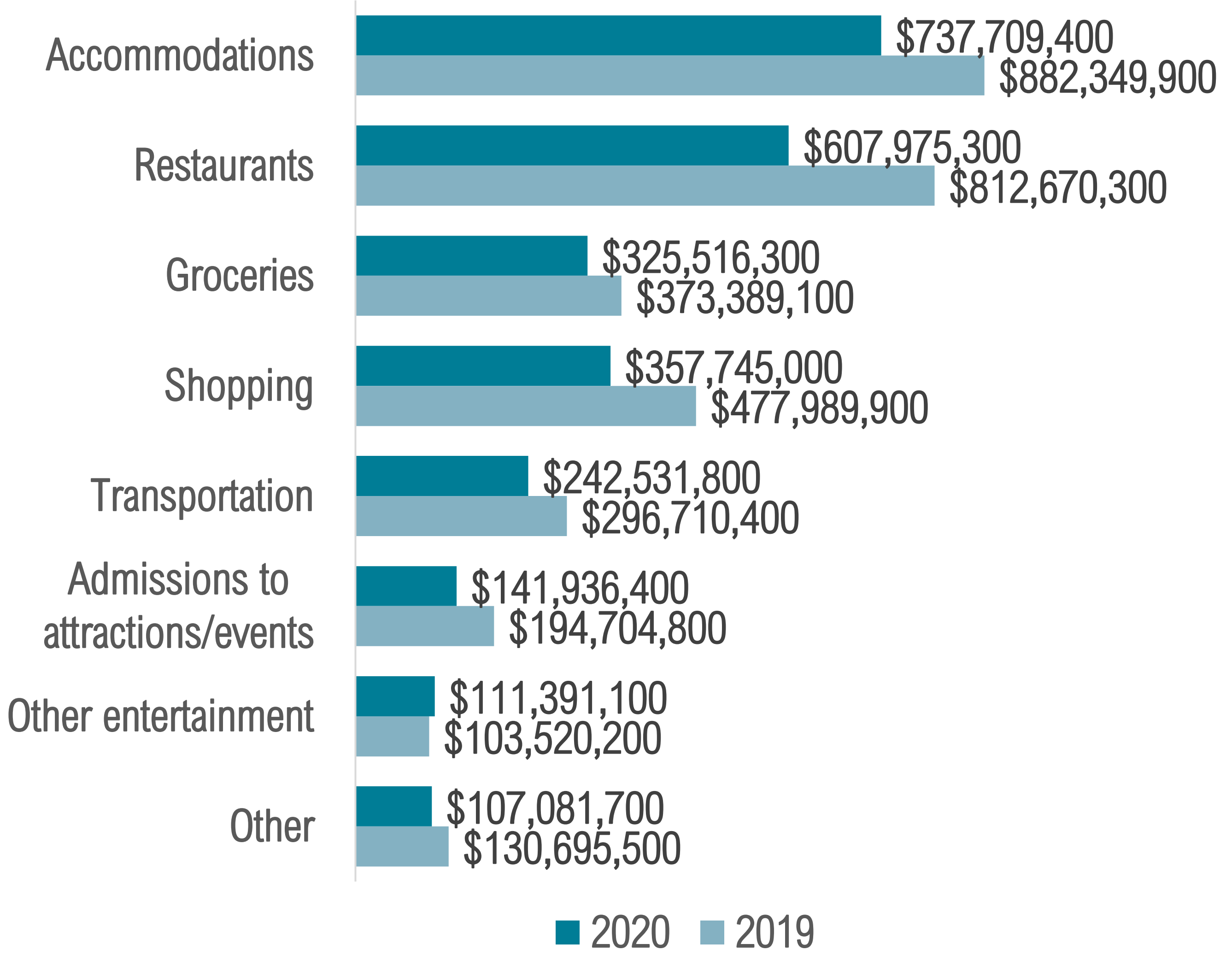
VISITOR EXPENDITURES BY VISITOR TYPE

2020 visitors spent **$2,631,887,000** in The Beaches of Fort Myers & Sanibel, resulting in a total economic impact of **$4,274,184,500**, down 19.6% from 2019.



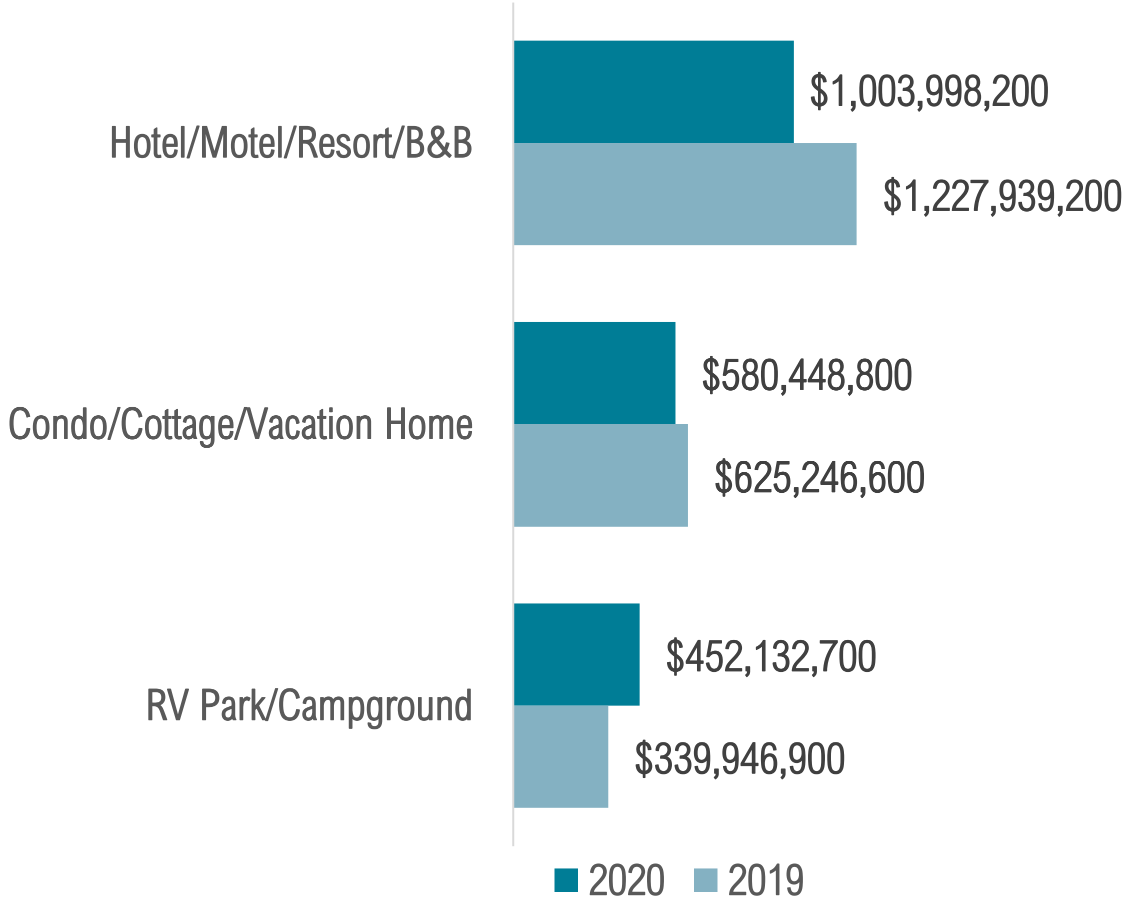
VISITOR EXPENDITURES BY SPENDING CATEGORY

Visitor spending on accommodations accounted for 28% of total visitor spending in 2020.



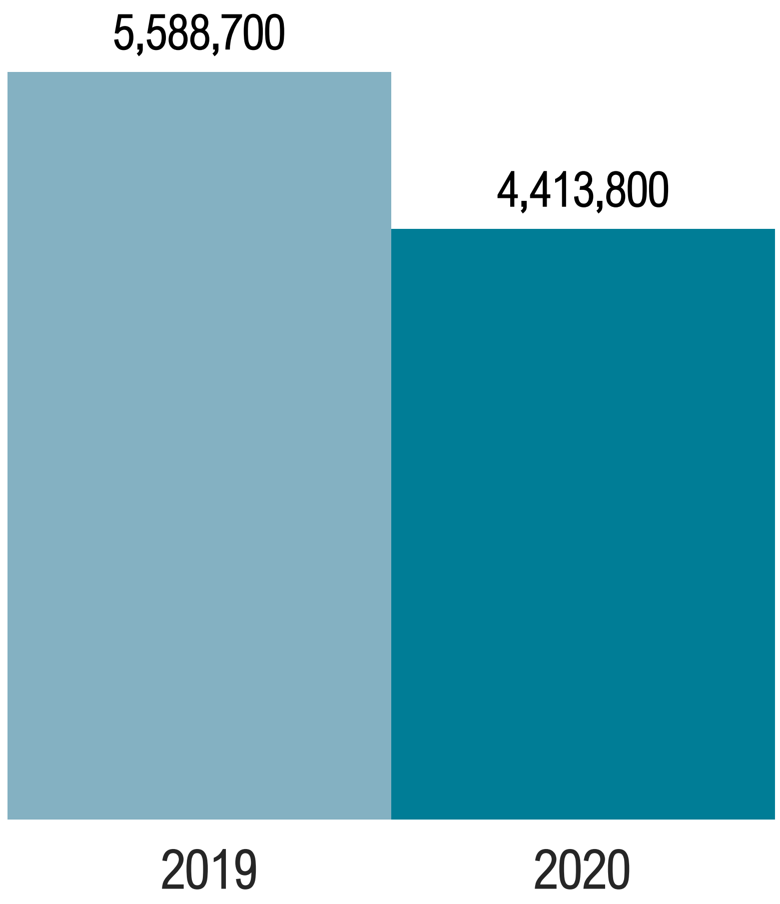
VISITOR EXPENDITURES BY LODGING TYPE

2020 visitors staying in **paid accommodations** spent **$2,036,579,700** in The Beaches of Fort Myers & Sanibel.



ROOM NIGHTS GENERATED

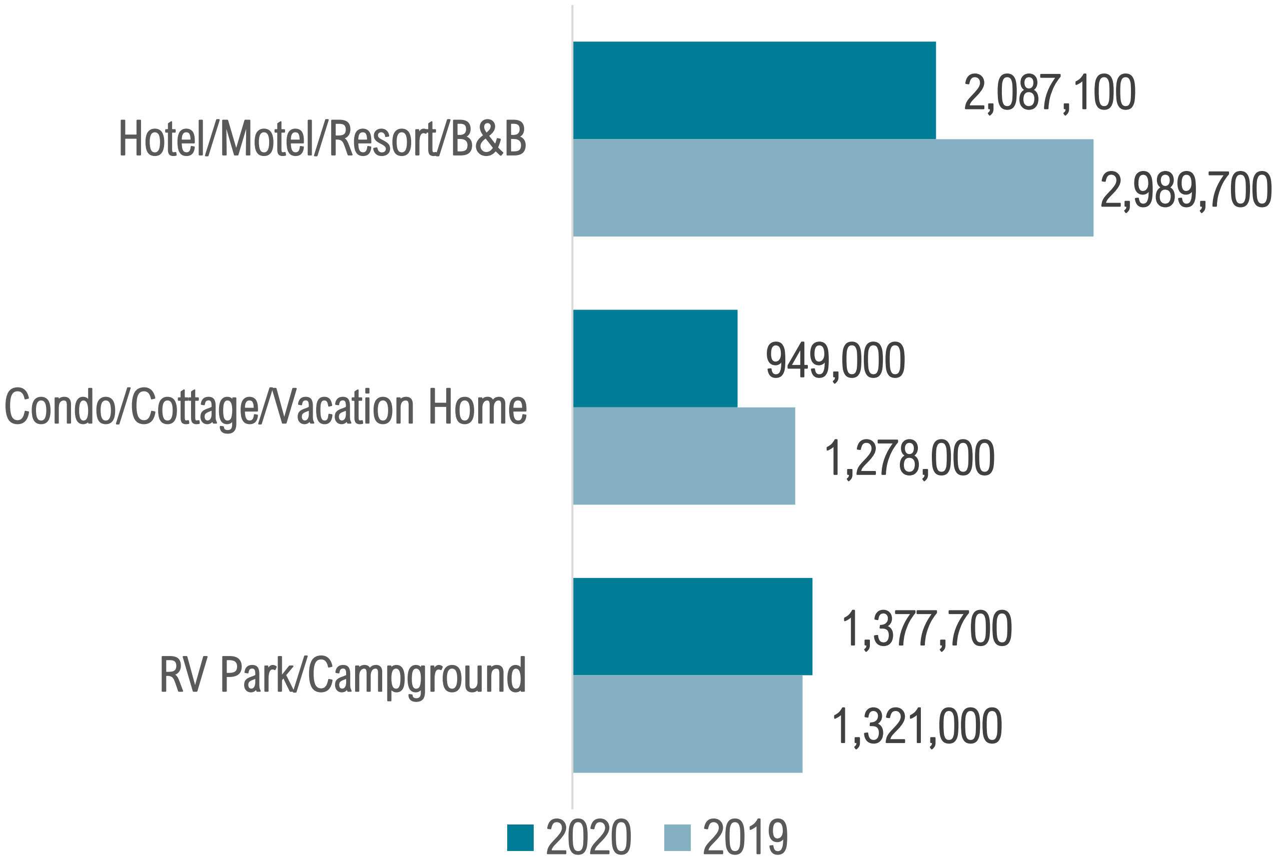
2020 visitors spent **4,413,800[1] nights** in The Beaches of Fort Myers & Sanibel hotels, resorts, condos, rental houses, etc. (-21.0% from 2019).



[1]Source: Occupancy Survey

ROOM NIGHTS GENERATED

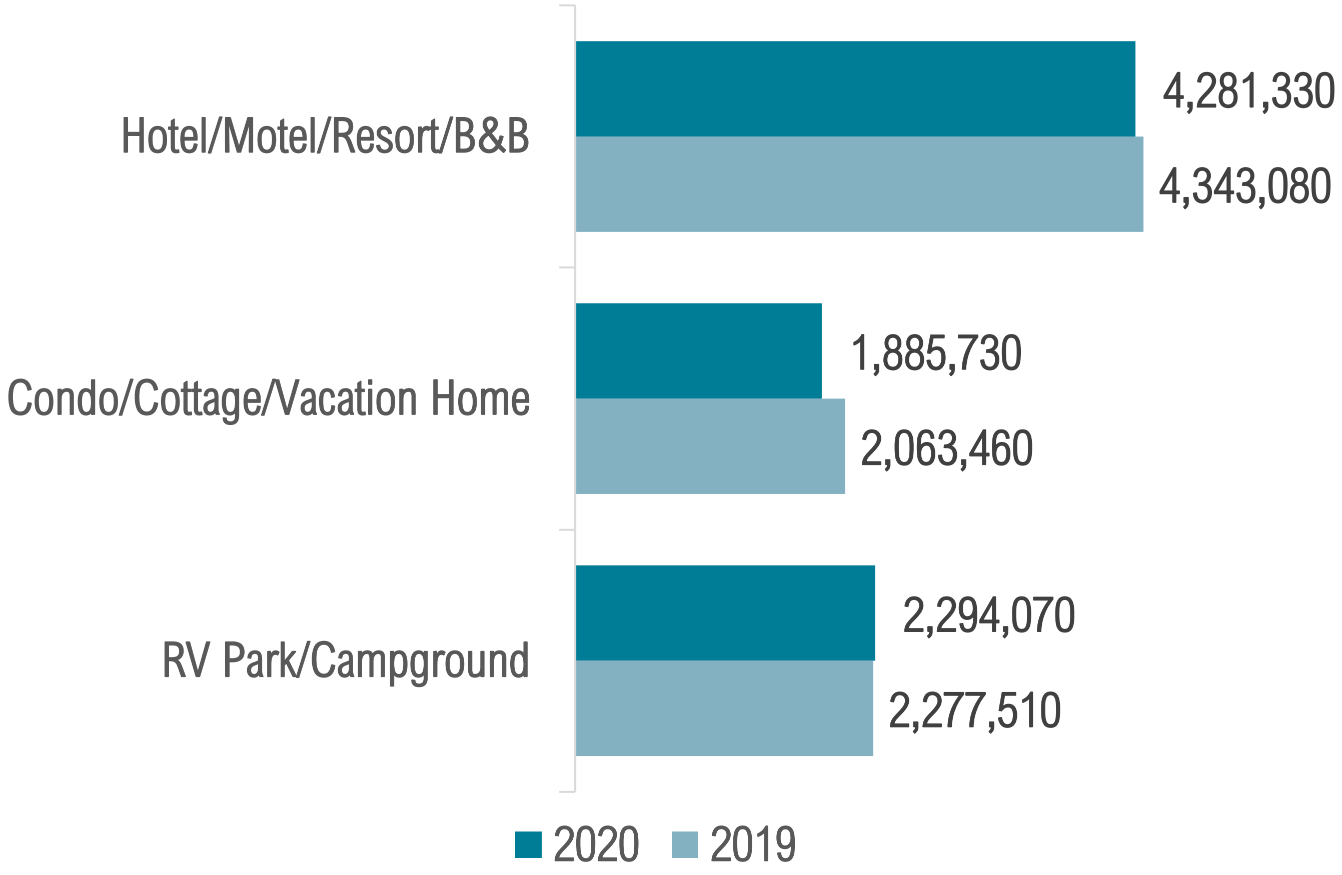
Motels, hotels, etc. accounted for over **2 in 5** nights in The Beaches of Fort Myers & Sanibel, while **RV Parks/Campgrounds** accounted for nearly **1 in 3** nights visitors spent in the area.



[1]Source: Occupancy Survey

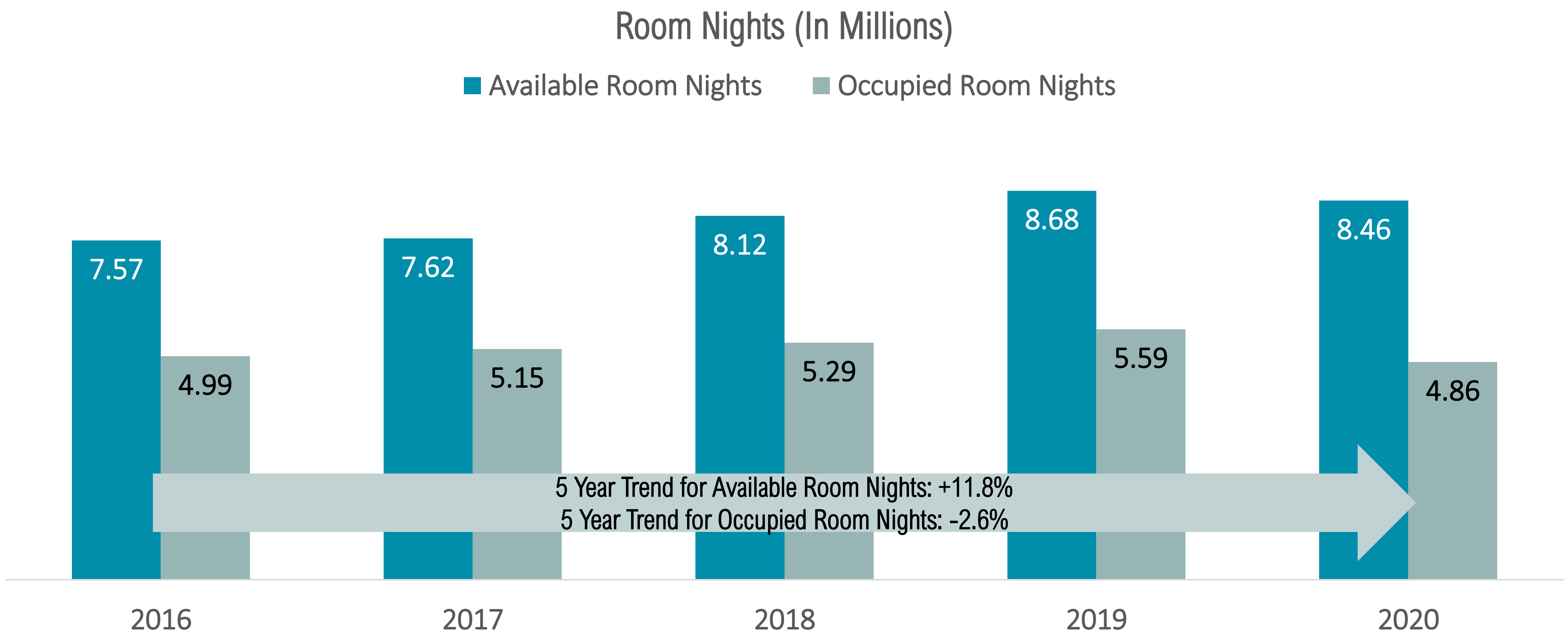
AVAILABLE ROOM NIGHTS

There were **8,461,130[1] available room nights** in 2020 vs. 8,684,050 in 2019 (-2.6%).

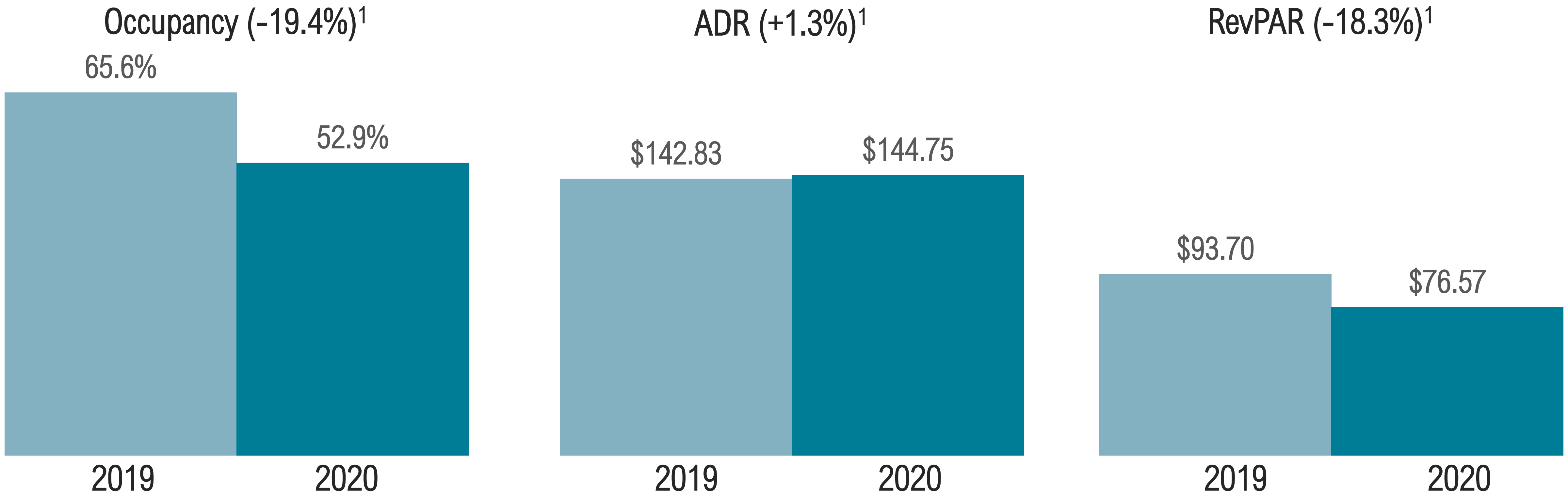


[1]Source: Occupancy Survey

5 YEAR TREND: AVAILABLE & OCCUPIED ROOM NIGHTS



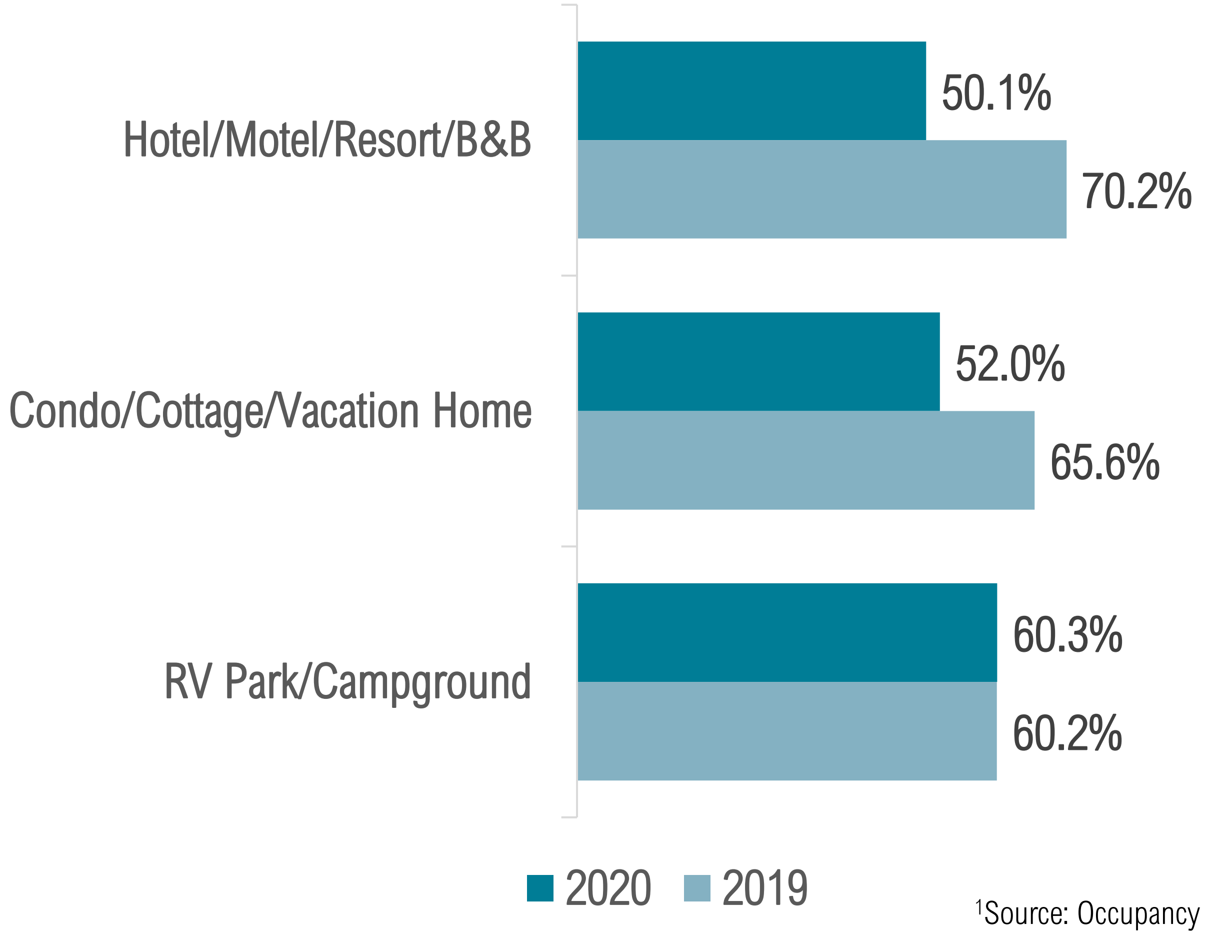
OCCUPANCY, ADR AND REVPAR



[1]Source: Occupancy Survey

OCCUPANCY

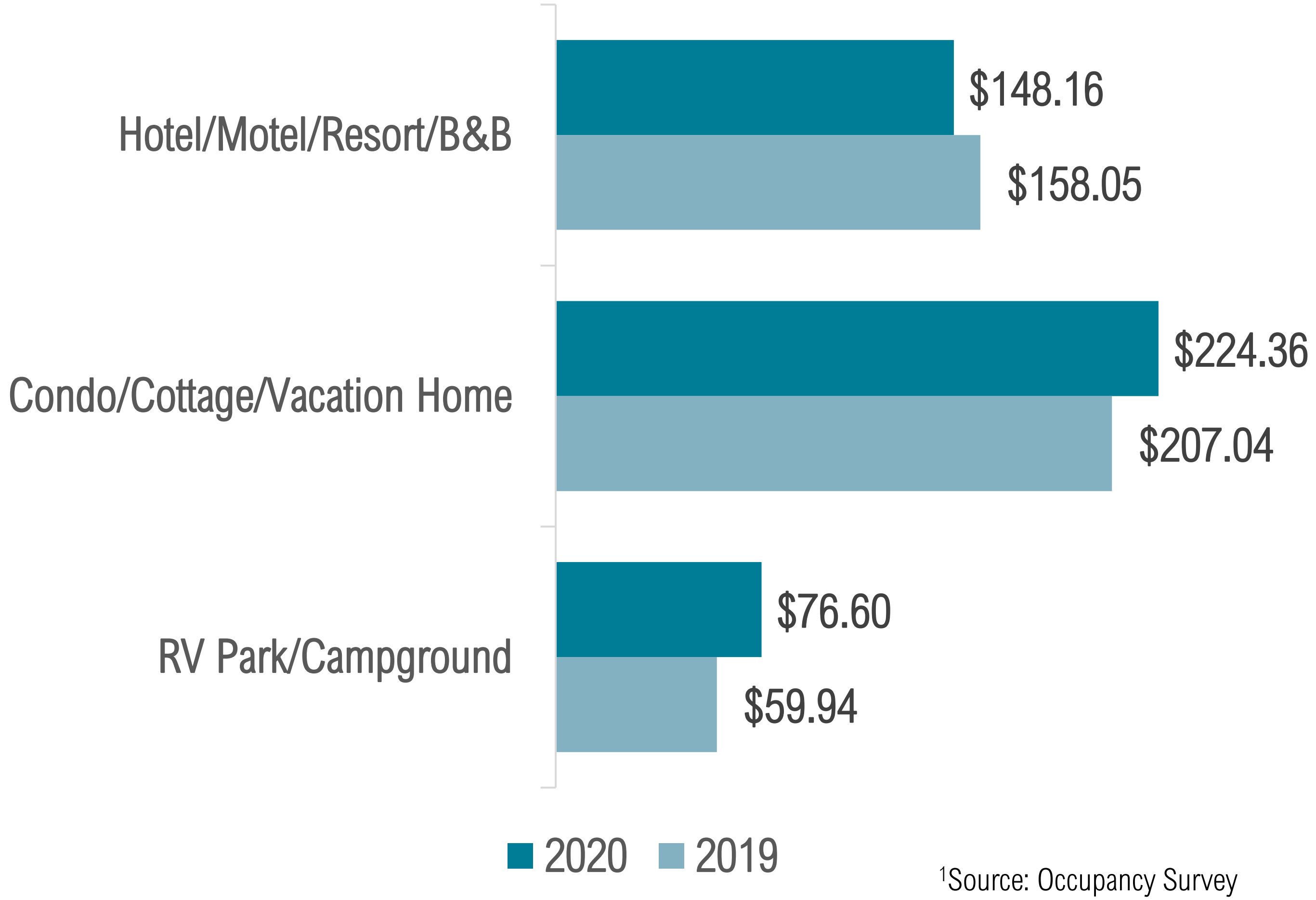
Average **occupancy** in 2020 was **52.9%**[1] (65.6% in 2019).



[1]Source: Occupancy Survey

ADR

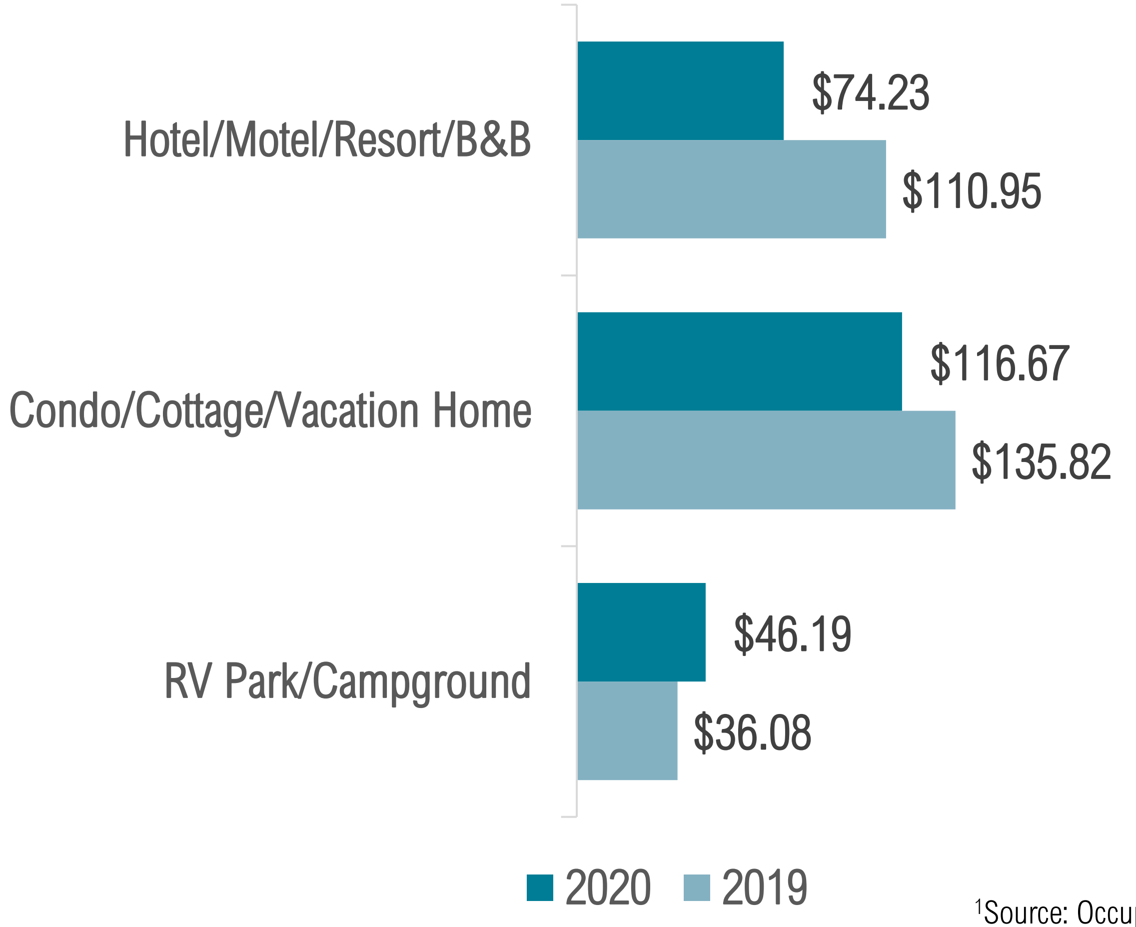
ADR in 2020 was **$144.75**[1] ($142.83 in 2019).



[1]Source: Occupancy Survey

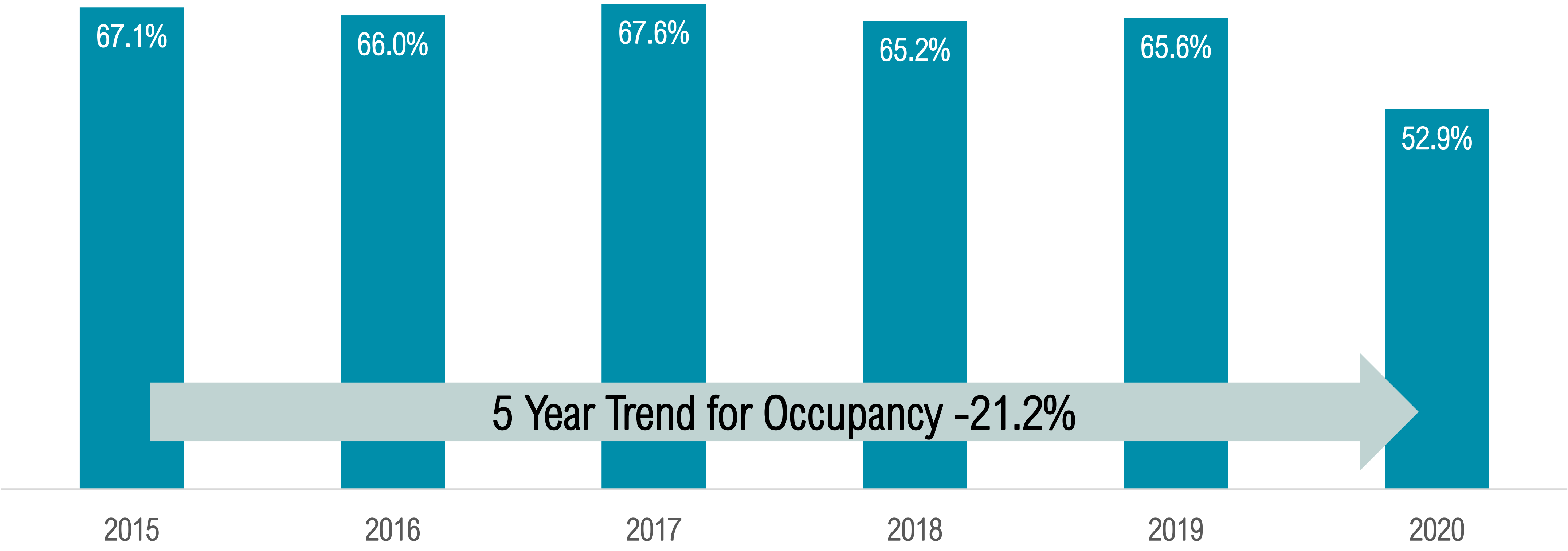
REVPAR

Average RevPAR in 2020 was $76.57[1] ($93.70 in 2019).

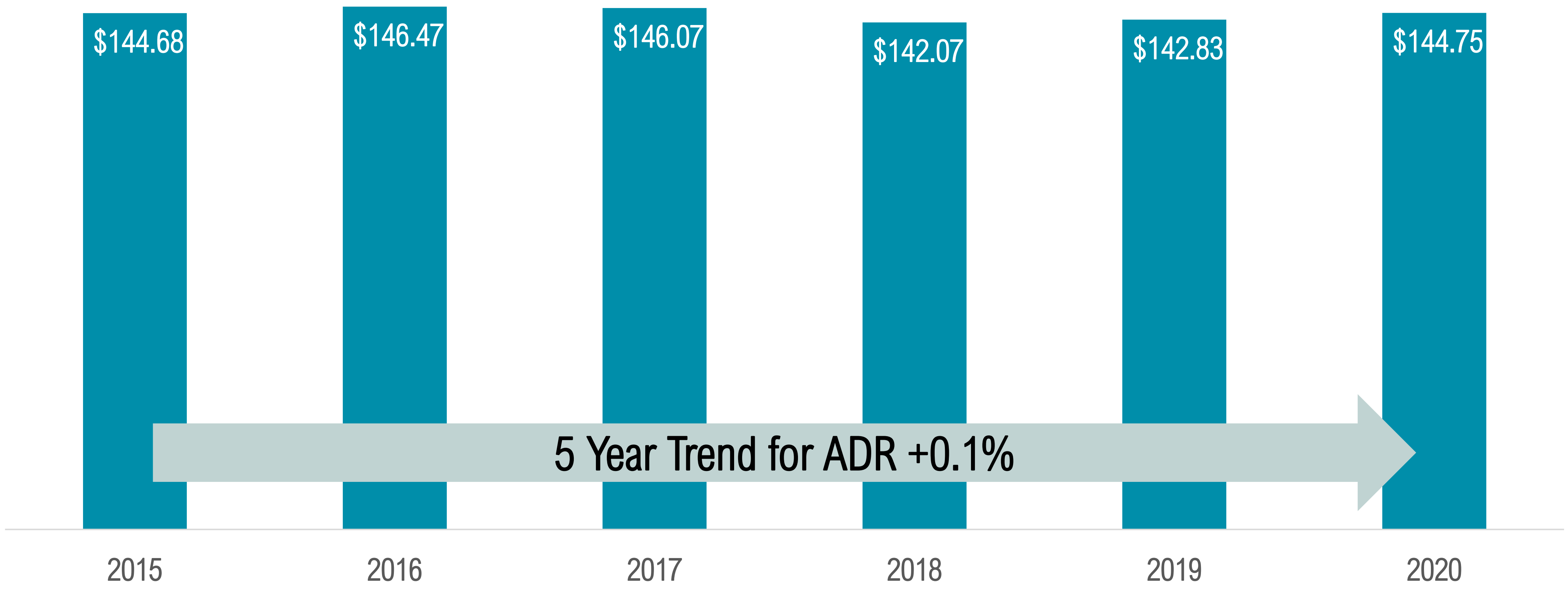


[1]Source: Occupancy Survey

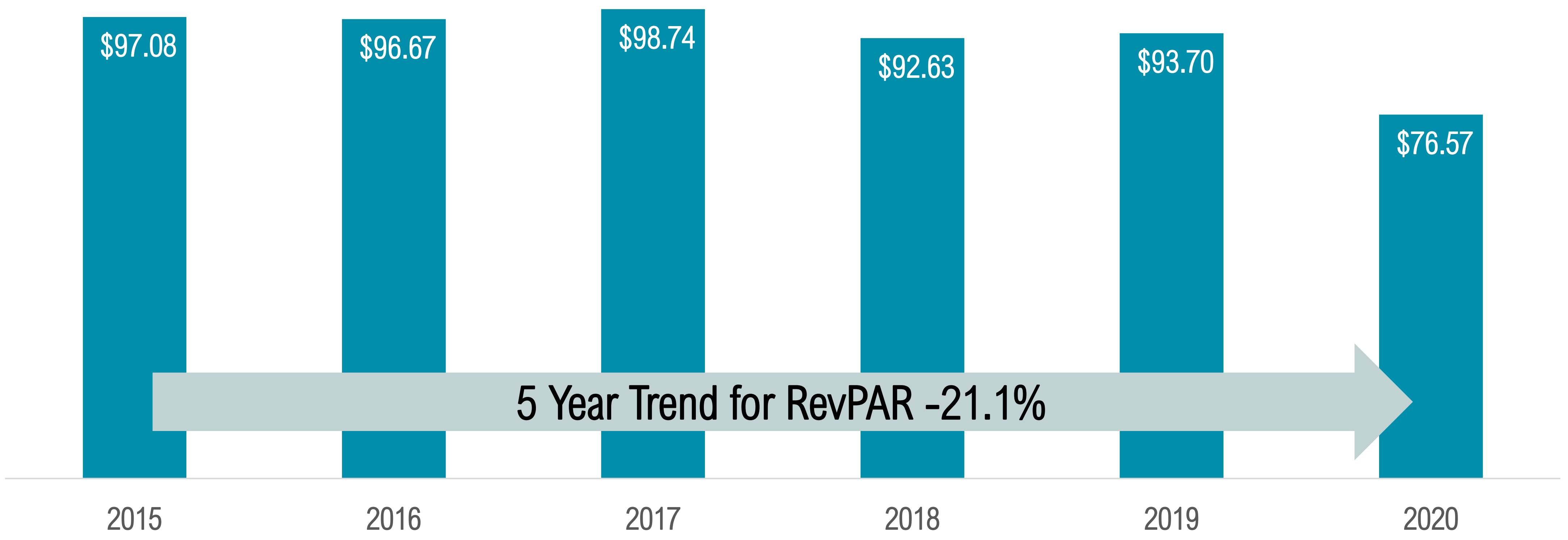
5 YEAR TREND: OCCUPANCY



5 YEAR TREND: ADR

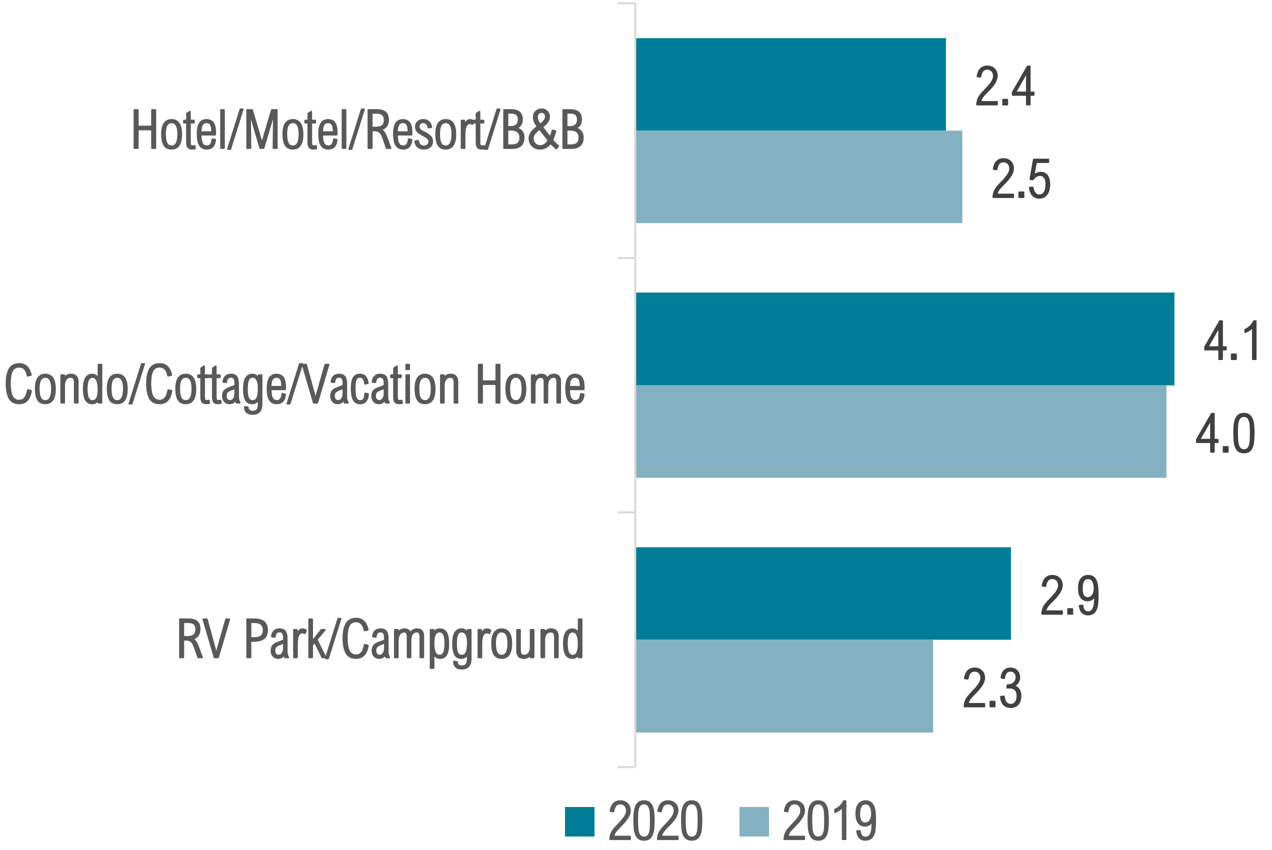


5 YEAR TREND: REVPAR



TRAVEL PARTY SIZE

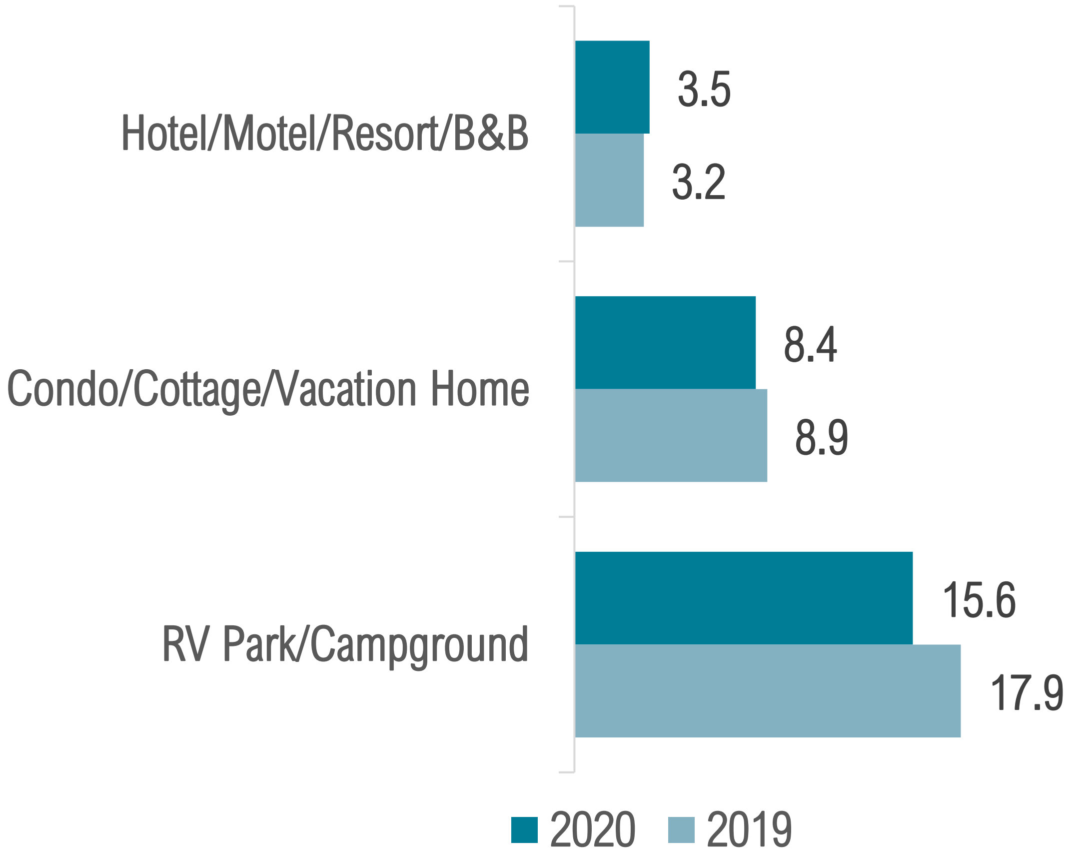
For visitors in paid accommodations, average **travel party size** in 2020 was **2.8 people**[1] (2.8 people in 2019).



[1]Source: Occupancy Survey

LENGTH OF STAY

For visitors in paid accommodations, average **length of stay** in 2020 was **5.5 nights**[1] (5.1 nights in 2019).



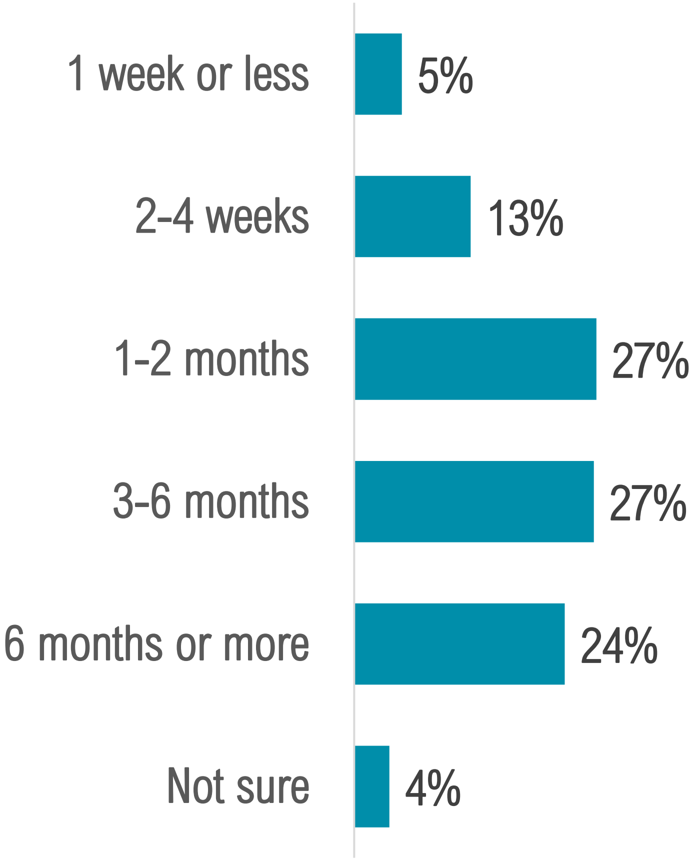
[1]Source: Occupancy Survey

VISITOR JOURNEY: PRE-VISIT

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

TRIP PLANNING CYCLE

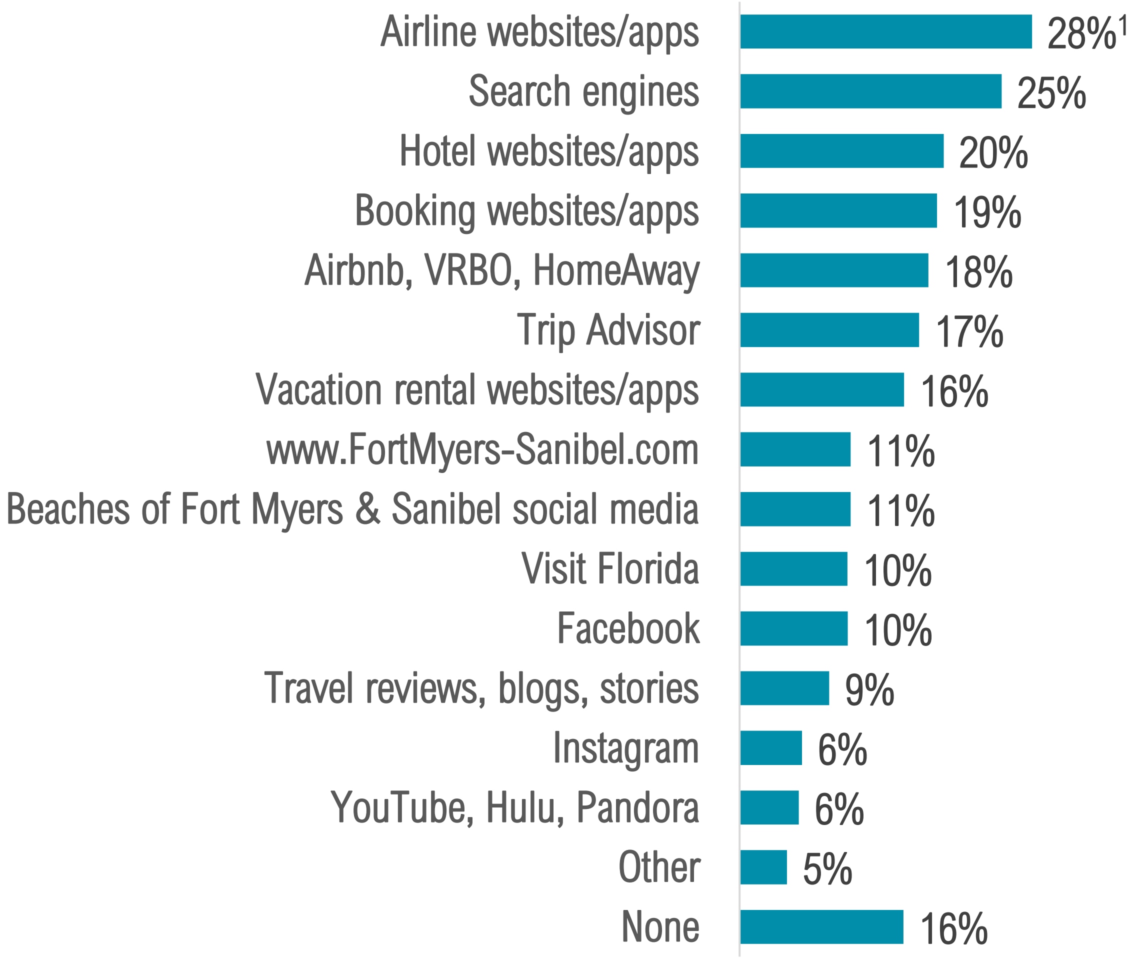
1 in 2 visitors planned their trip at least 3 months in advance, while only 18% planned their trip less than a month in advance.



TRIP PLANNING: WEBSITES USED

84% of visitors used **websites** to plan their trips to The Beaches of Fort Myers & Sanibel.

Visitors' use of **The Beaches of Fort Myers & Sanibel website and social media** doubled in 2020.



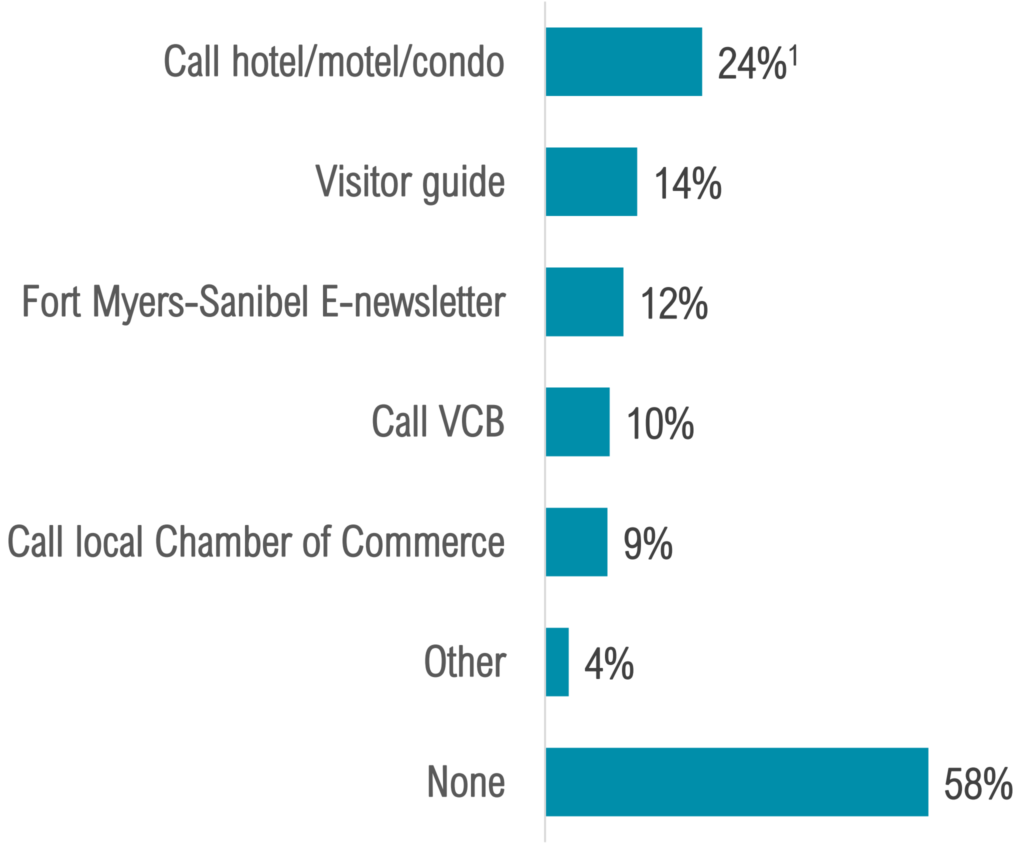
[1]Multiple responses permitted.

TRIP PLANNING: INFORMATION REQUESTS

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

1 in 4 visitors called a hotel/motel/condo, while 1 in 7 consulted a visitor guide.

Visitors are much more likely to make information requests in 2020.

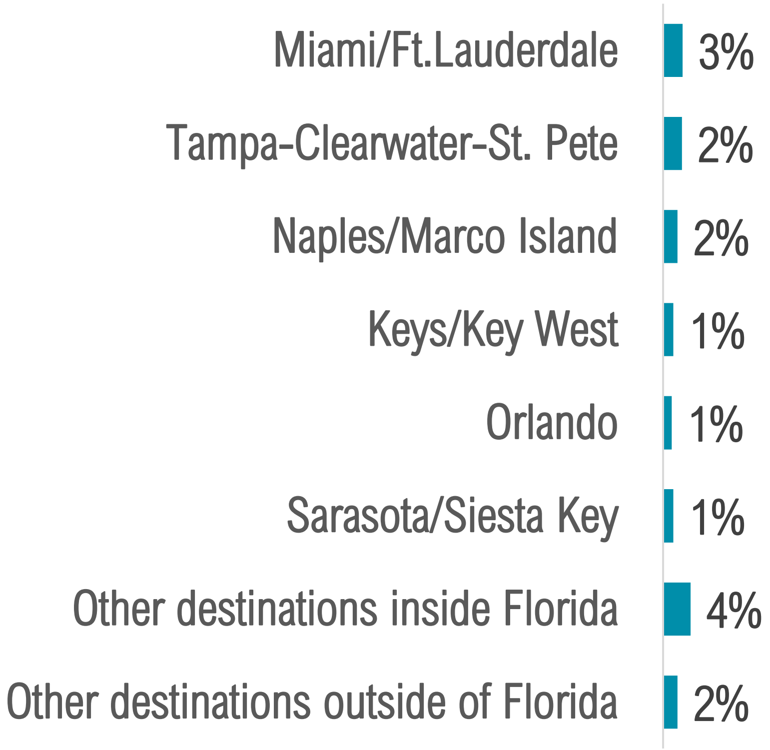


[1]Multiple responses permitted.

TRIP PLANNING: OTHER DESTINATIONS CONSIDERED

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

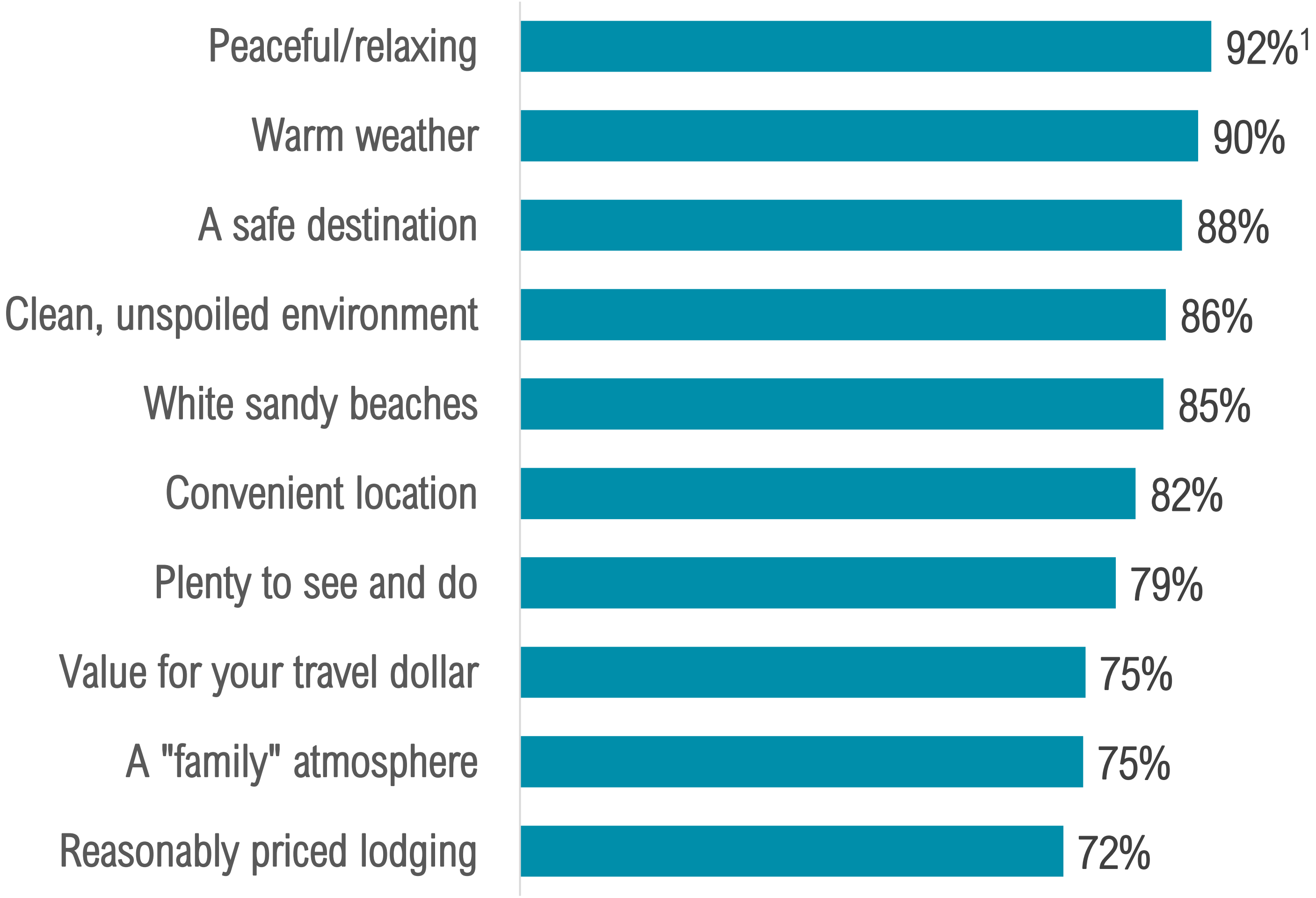
Other Destinations Considered[1]



[1]Coded verbatim responses; multiple responses permitted.

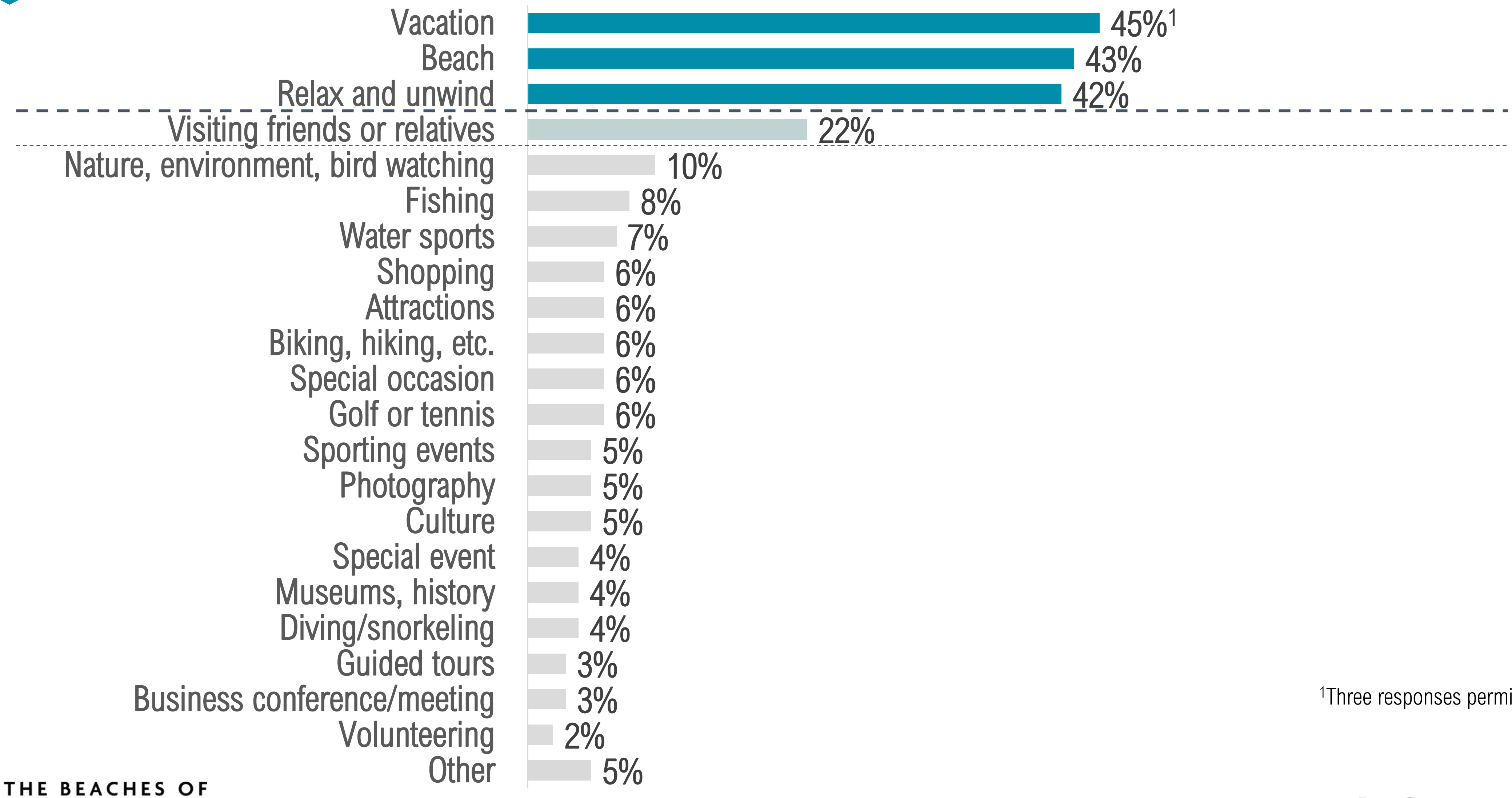
TRIP INFLUENCERS

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



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

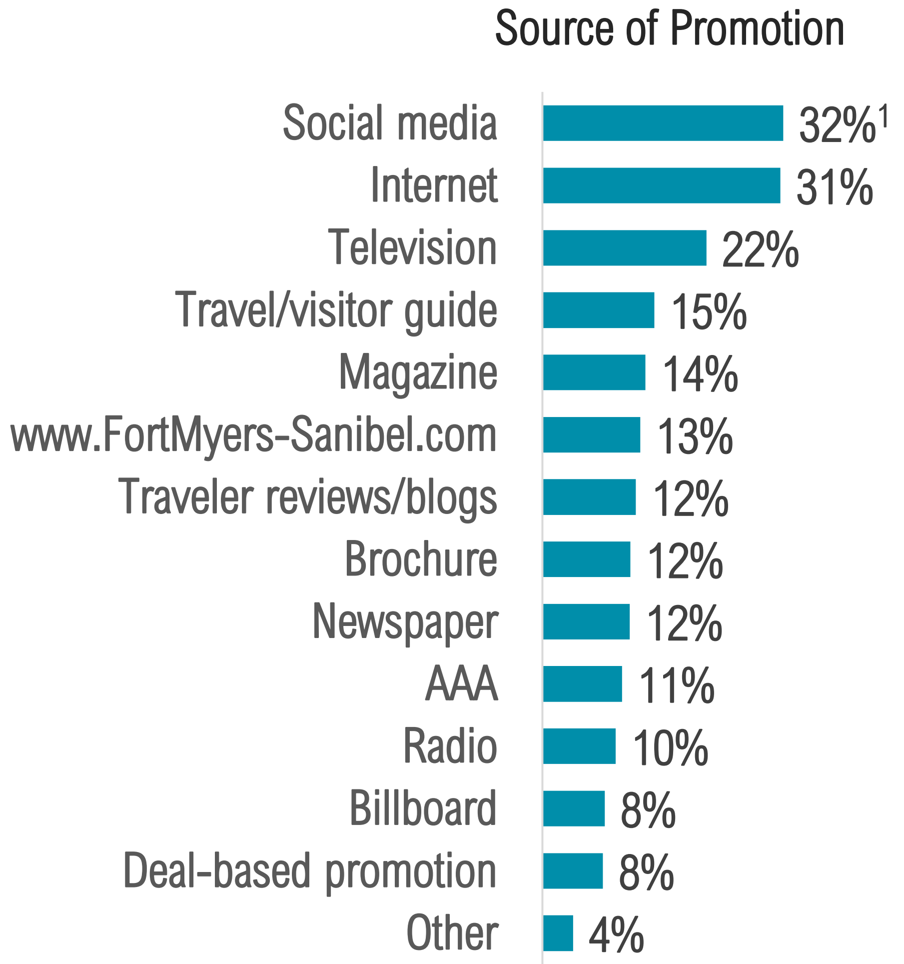
REASON FOR VISITING



[1]Three responses permitted.

PROMOTIONS

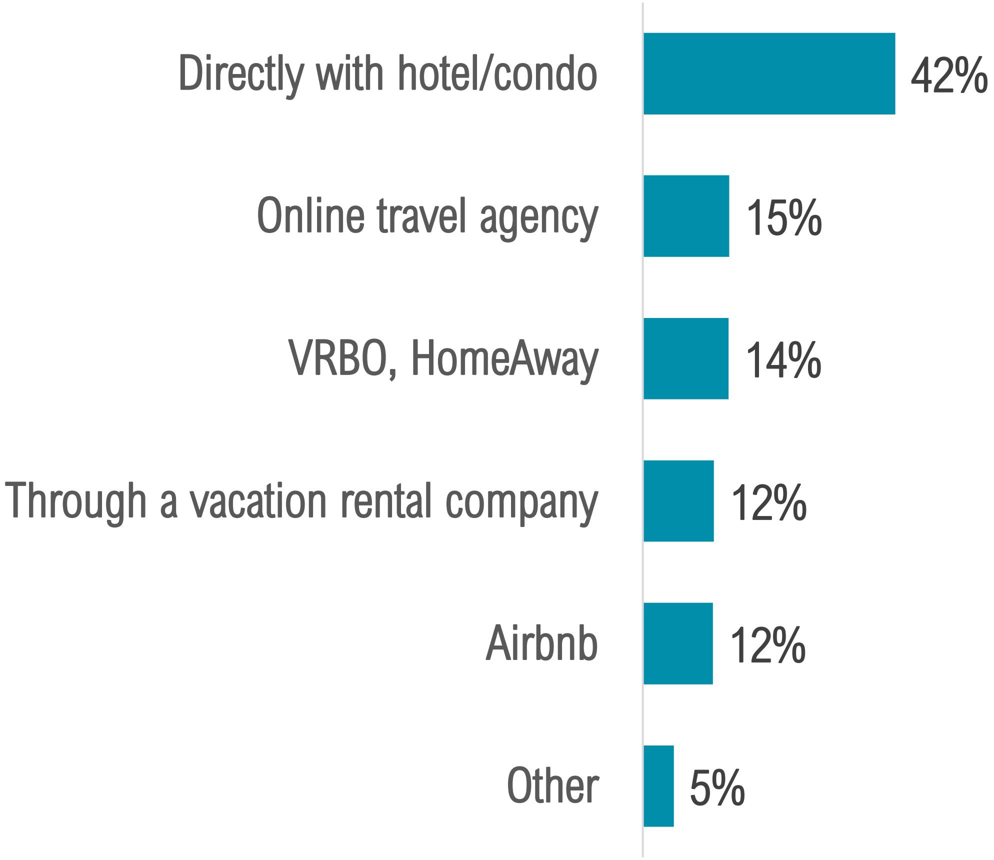
38% of visitors recalled promotions for The Beaches of Fort Myers & Sanibel, primarily on social media or the Internet.



[1]Multiple responses permitted.

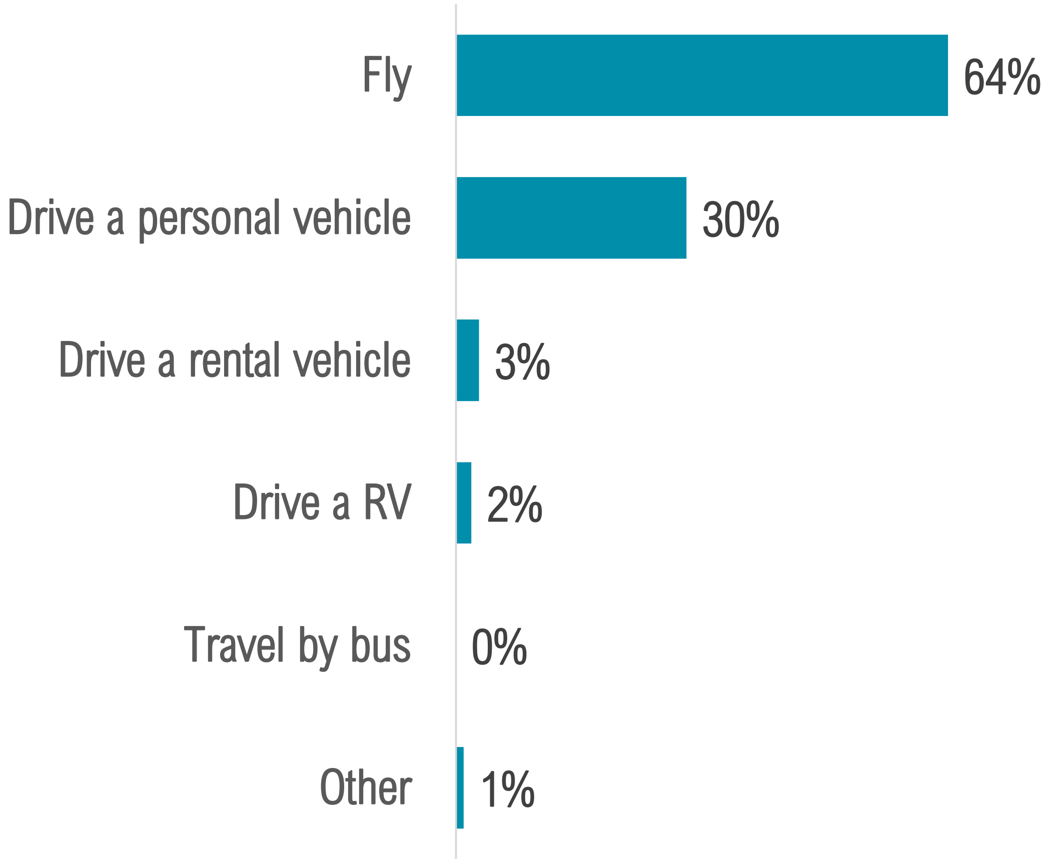
BOOKING

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



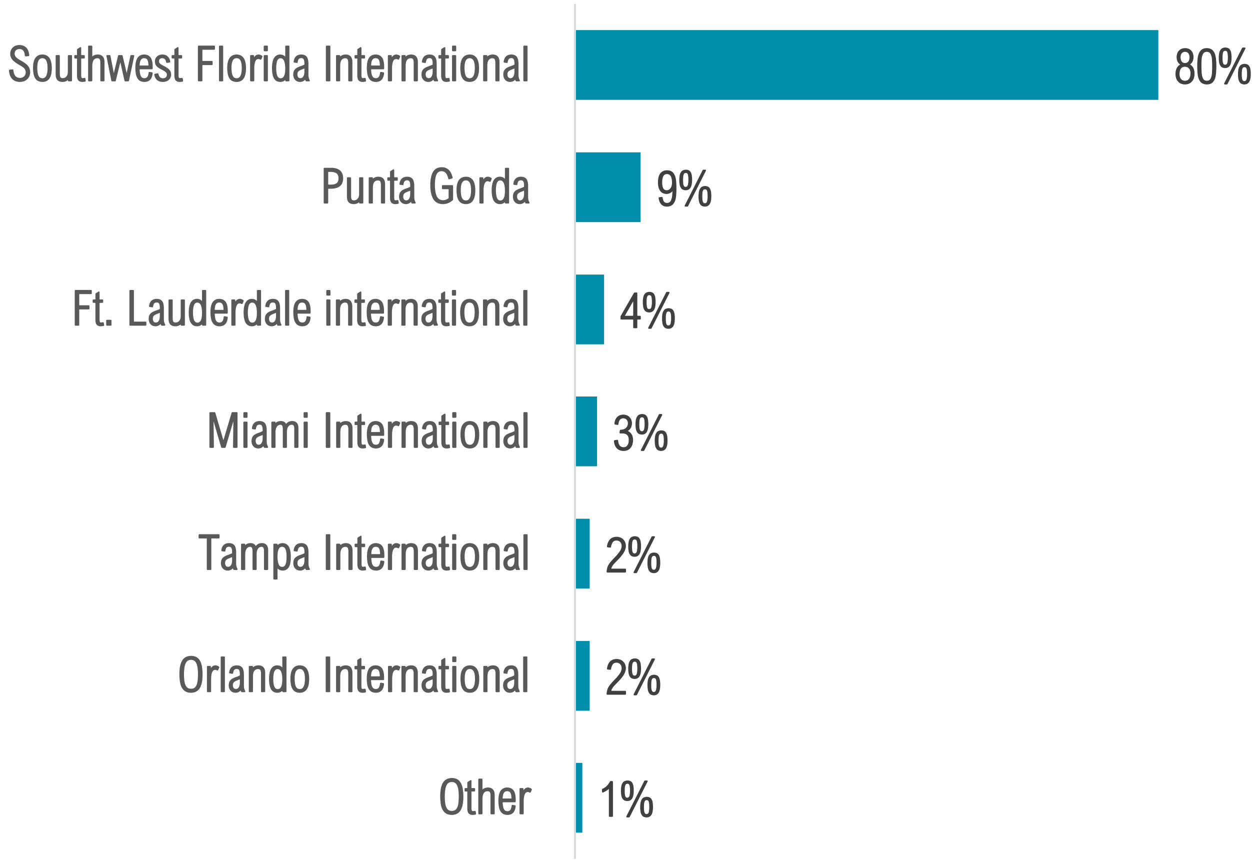
TRANSPORTATION

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



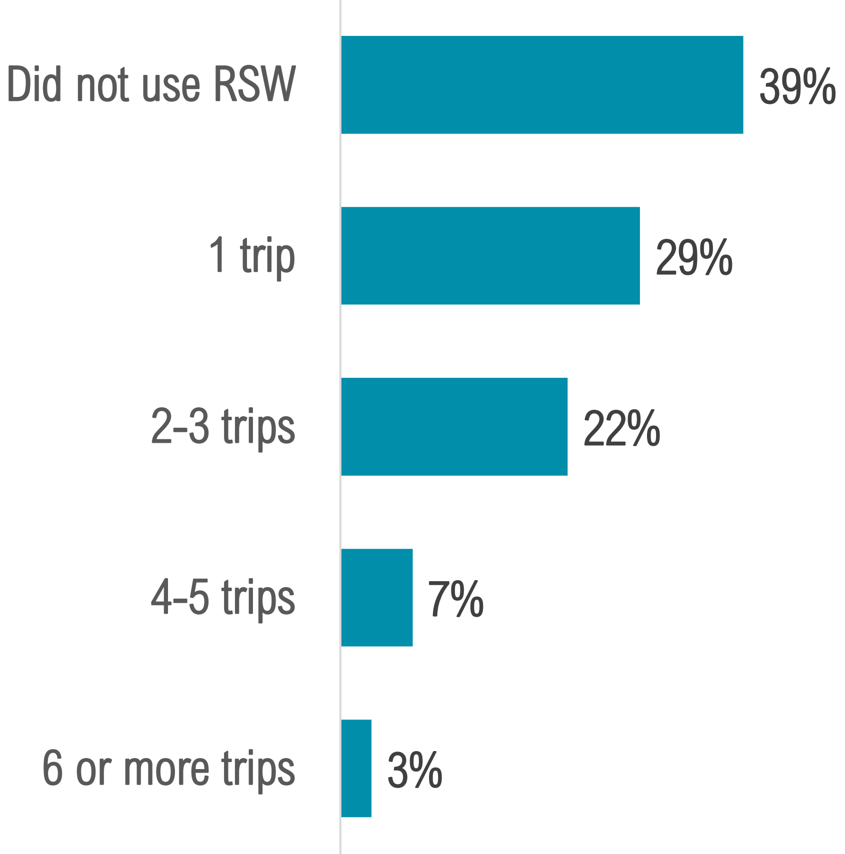
AIRPORT

4 in 5 visitors who flew to The Beaches of Fort Myers & Sanibel came through RSW.



USE OF RSW IN THE PAST YEAR

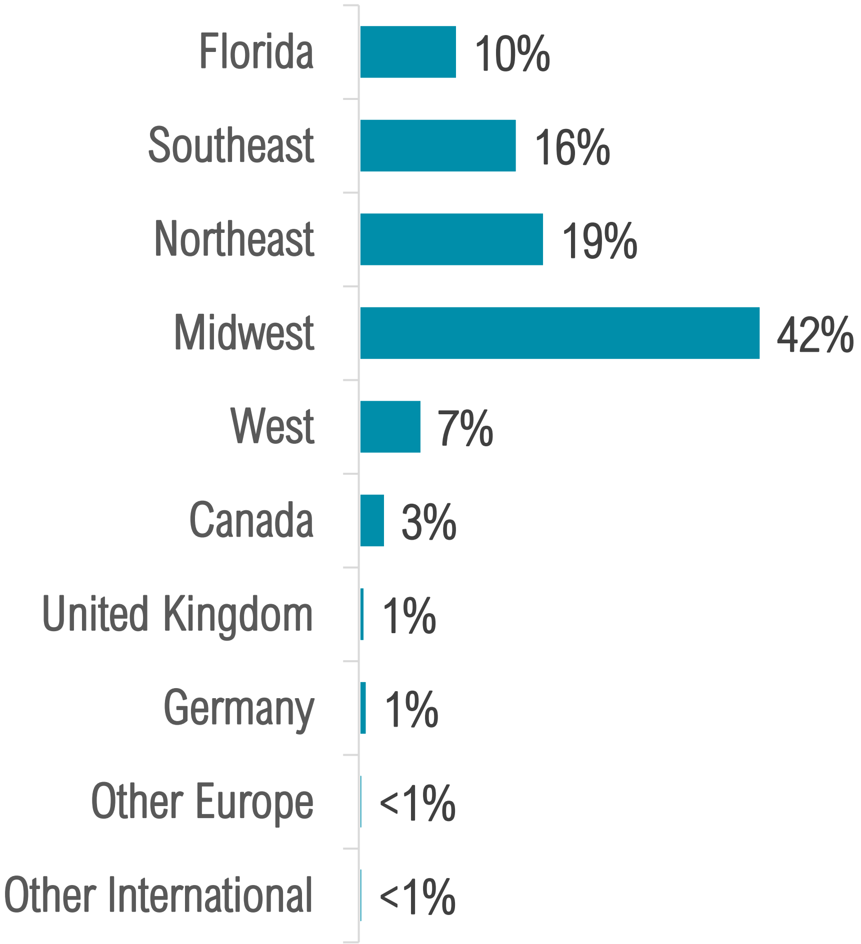
61% of visitors used RSW at least once in the past year.

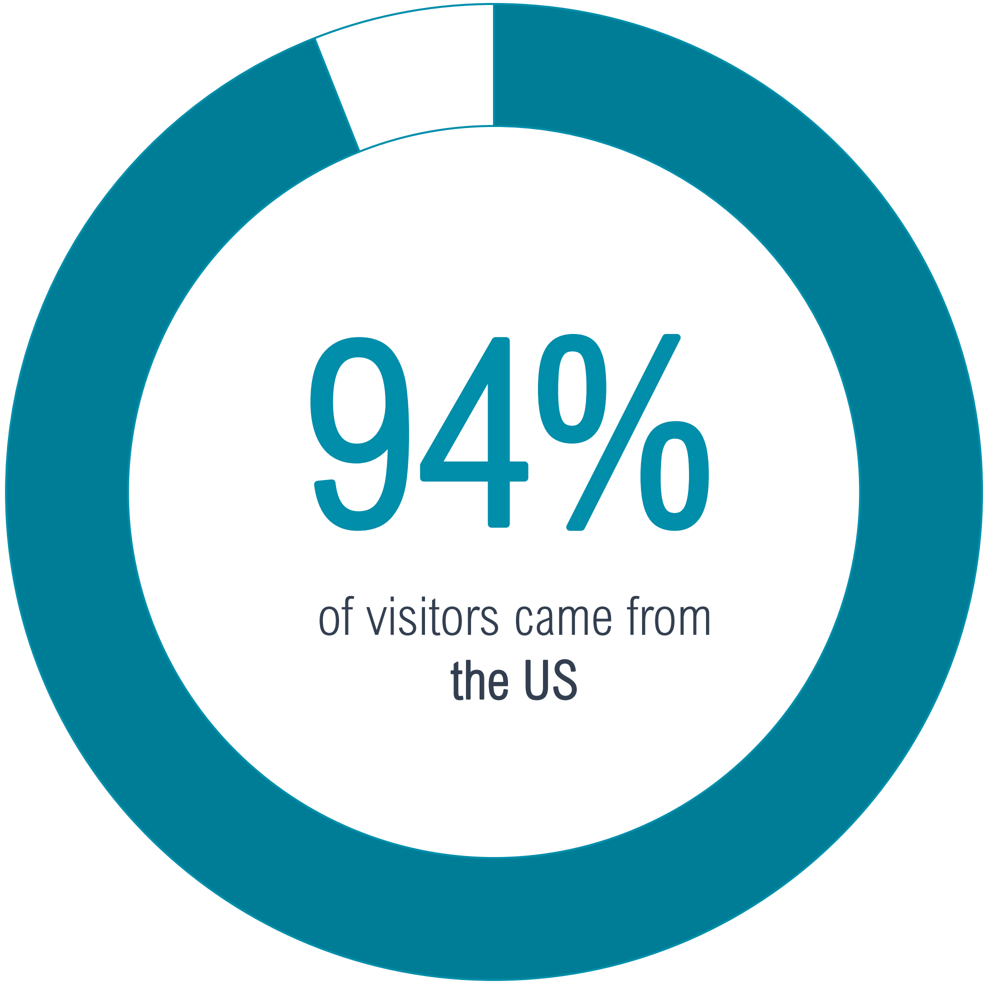


VISITOR JOURNEY: TRAVEL PARTY PROFILE

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

ORIGIN[1]

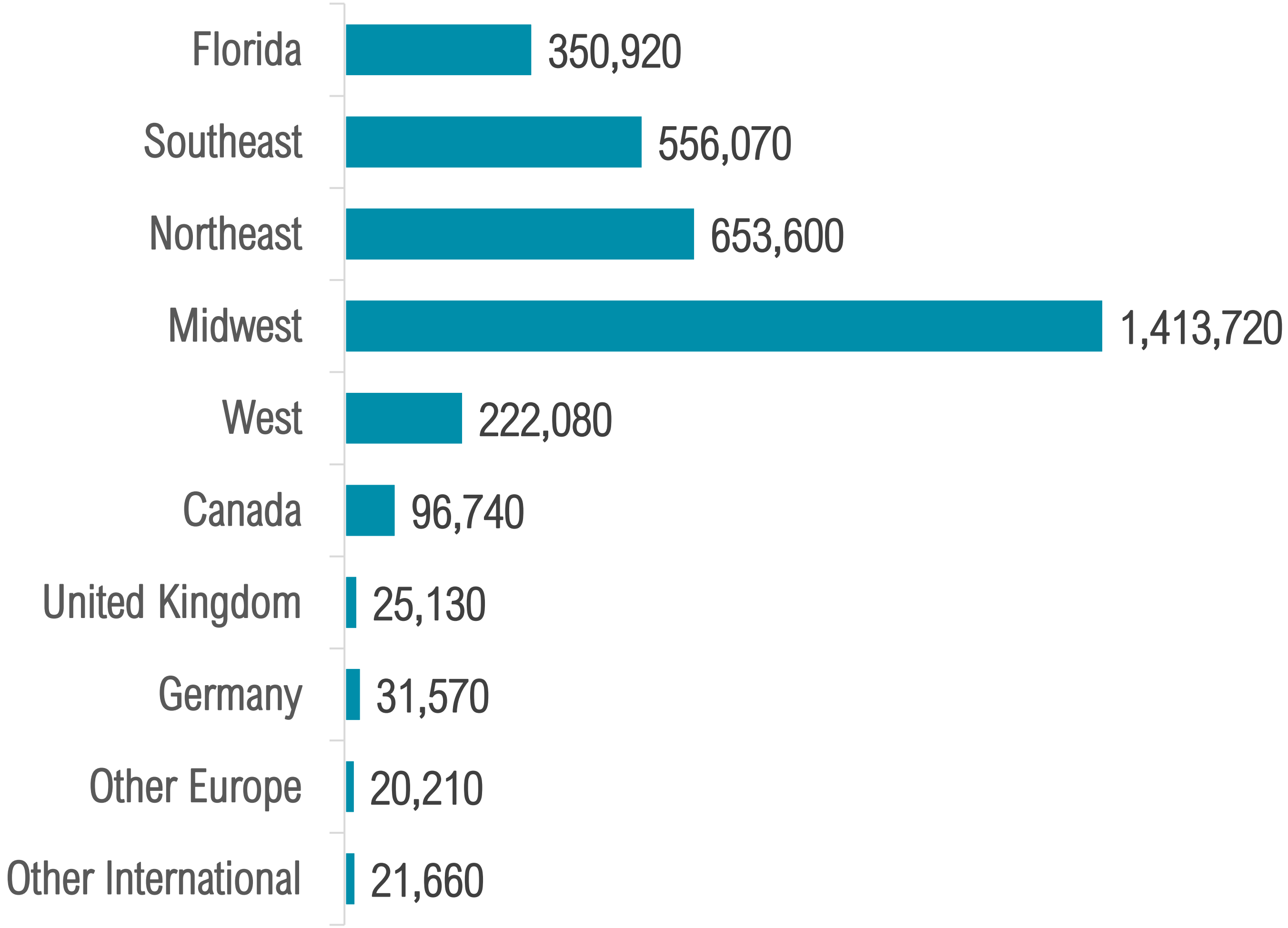




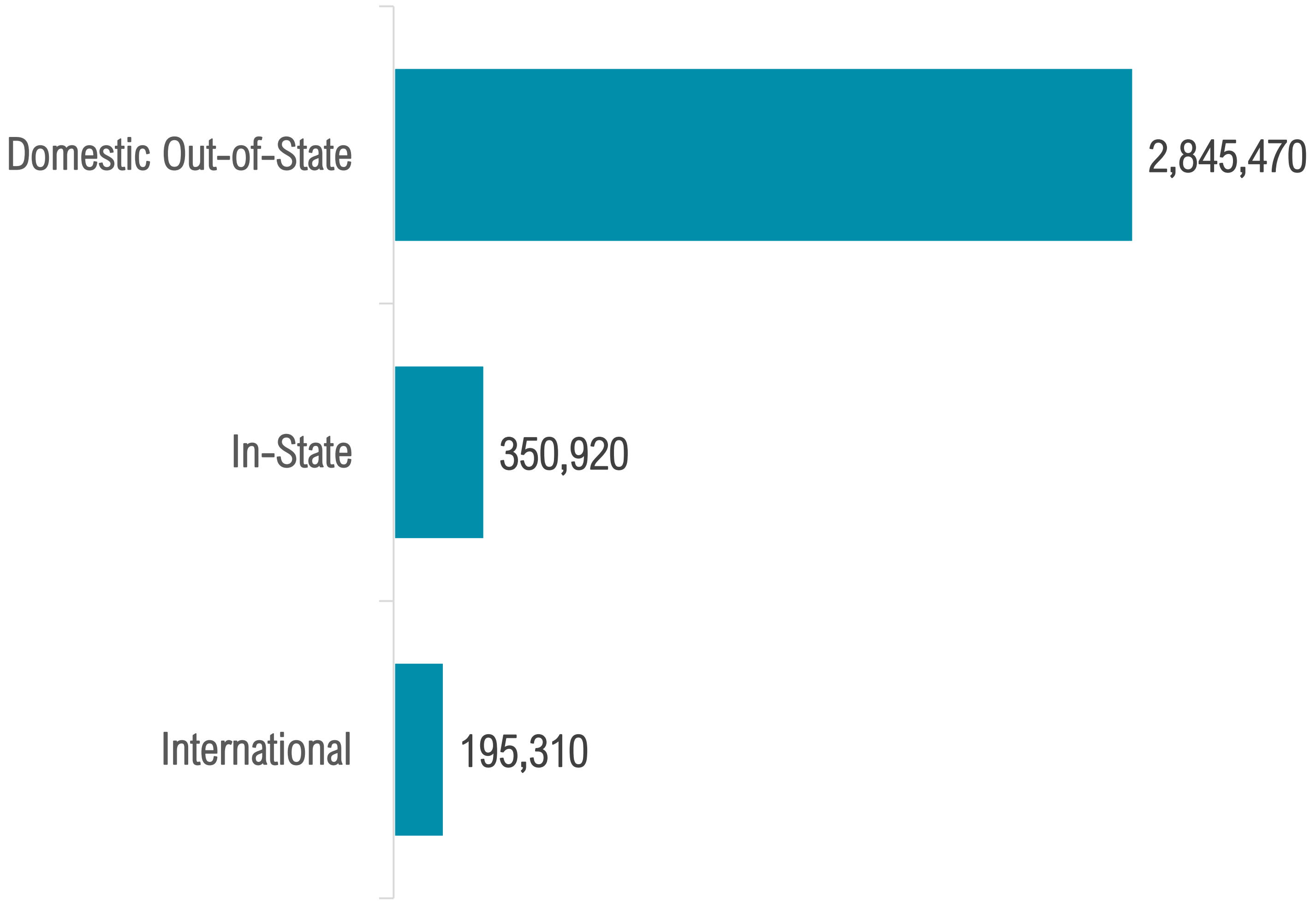
[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers.

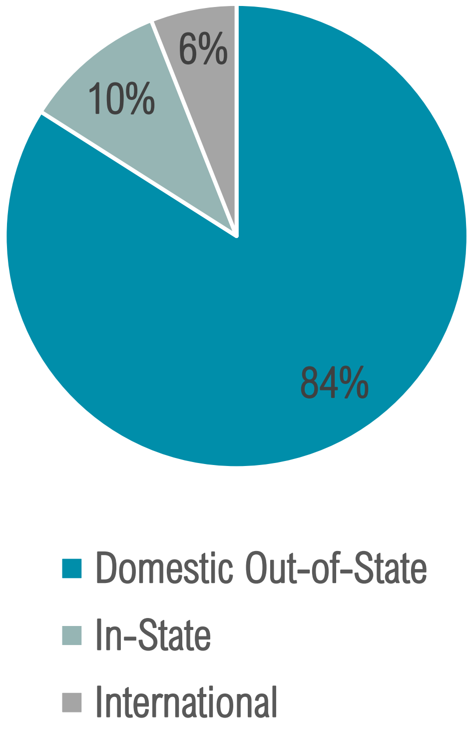
Number of Visitors by Origin

Total of 3,391,700 visitors in 2020.

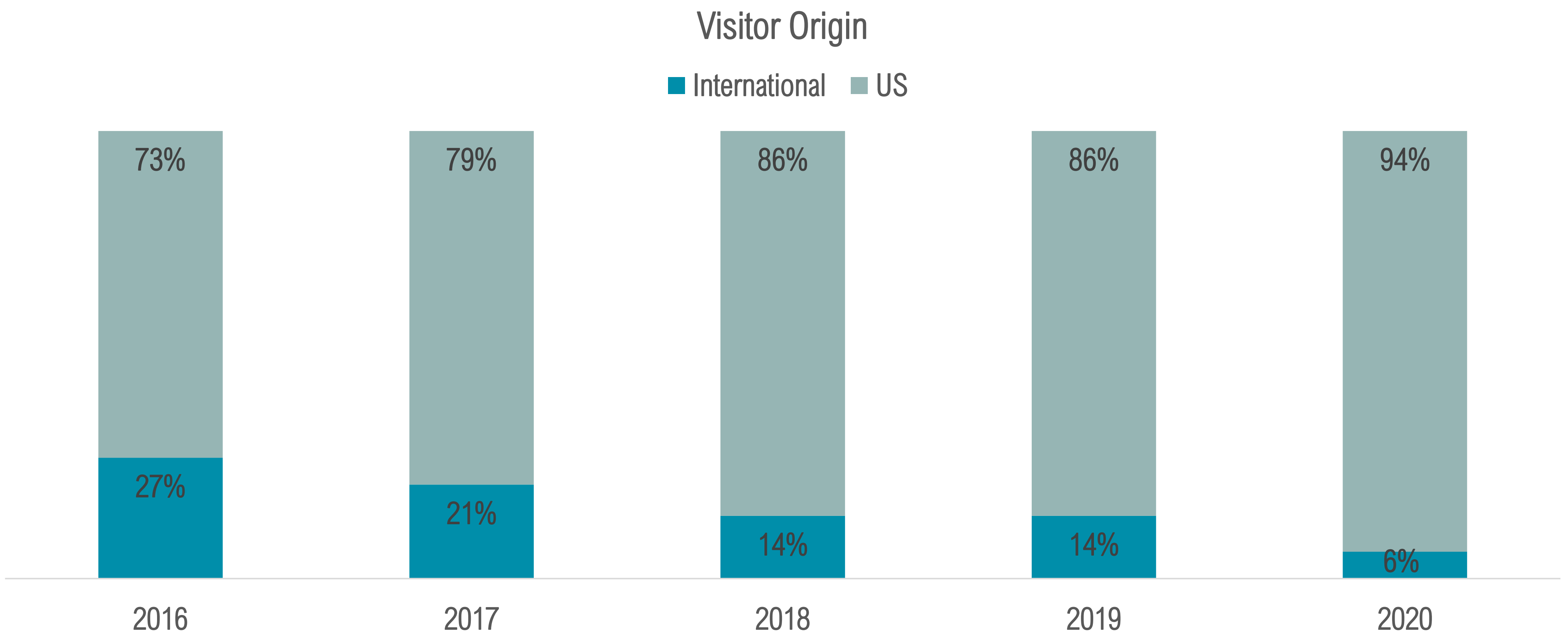


Number of Visitors by Origin





5 YEAR TREND: US VS. INTERNATIONAL VISITATION



5 YEAR TREND: ORIGIN

Country	2016	2017	2018	2019	2020
Florida	6%	6%	9%	10%	10%
Southeast	12%	13%	16%	12%	16%
Northeast	17%	20%	20%	21%	19%
Midwest	34%	37%	37%	38%	42%
West	4%	3%	3%	5%	7%
International	27%	21%	14%	14%	6%

ORIGIN COUNTRY

2020 international visitation decreased significantly as a result of the COVID-19 crisis.

Country	% of Visitors
United States	94.3%
Canada	2.9%
Germany	0.9%
United Kingdom	0.7%
Other	1.2%

5 YEAR TREND: ORIGIN COUNTRY

Country	2016	2017	2018	2019	2020
United States	73%	79%	86%	86%	94%
Canada	6%	8%	4%	4%	3%
Germany	11%	6%	4%	4%	1%
United Kingdom	5%	3%	2%	2%	1%
Other	5%	4%	4%	4%	1%

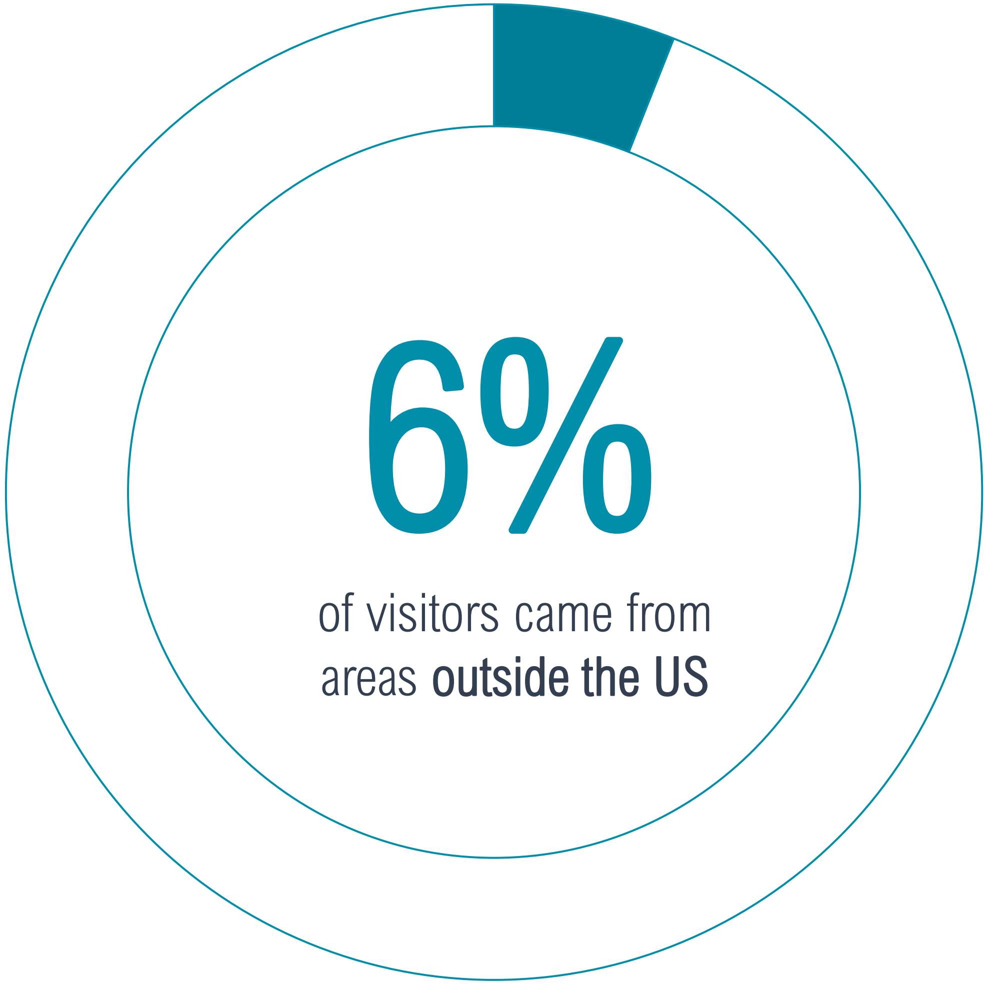
TOP ORIGIN MARKETS[1]

Market	Percentage of Visitors
New York City	6%
Chicago	4%
Miami-Ft. Lauderdale	4%
Detroit	4%
Minneapolis-Saint Paul	4%
Washington D.C.-Baltimore	3%
Indianapolis	3%
Cleveland-Akron	2%
Boston	2%
Grand Rapids	2%
Green Bay-Appleton, WI	2%
Atlanta	2%
Milwaukee	2%
Cincinnati	2%
Nashville	2%
St. Louis	2%
Philadelphia	2%
Tampa-Clearwater-St. Pete	2%

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

TOP INTERNATIONAL ORIGIN MARKETS[1]

Market	Percentage of Visitors
London	0.2%
Toronto	0.2%
Vancouver	0.1%
Calgary	0.1%
Berlin	0.1%
Munich	0.1%
Dusseldorf	0.1%
Amsterdam	0.1%
Hamburg	0.1%



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

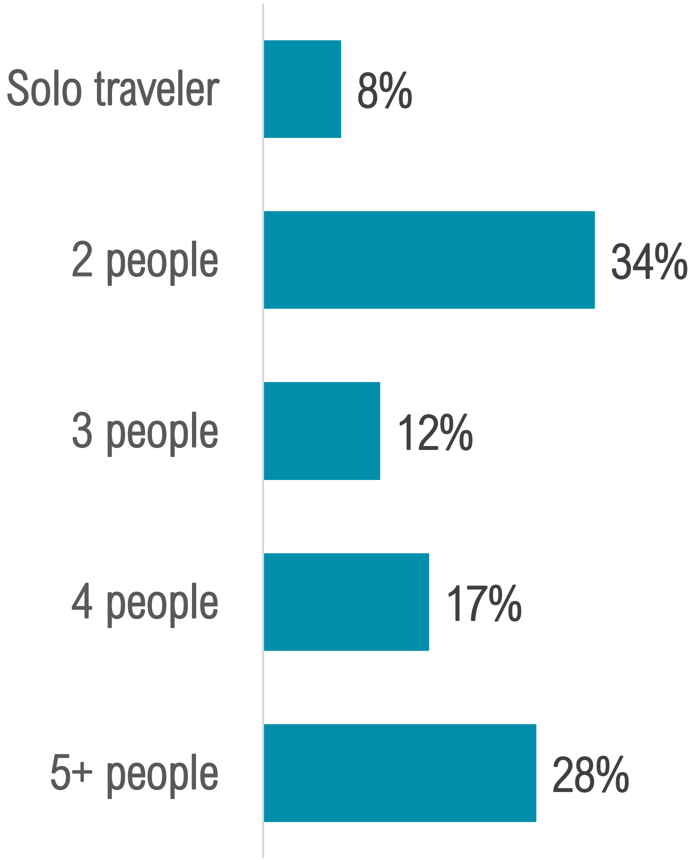
TRAVEL PARTY SIZE AND COMPOSITION

Travel Party Size

Visitors traveled in a party composed of 3.4[1] people.

Travel with Children

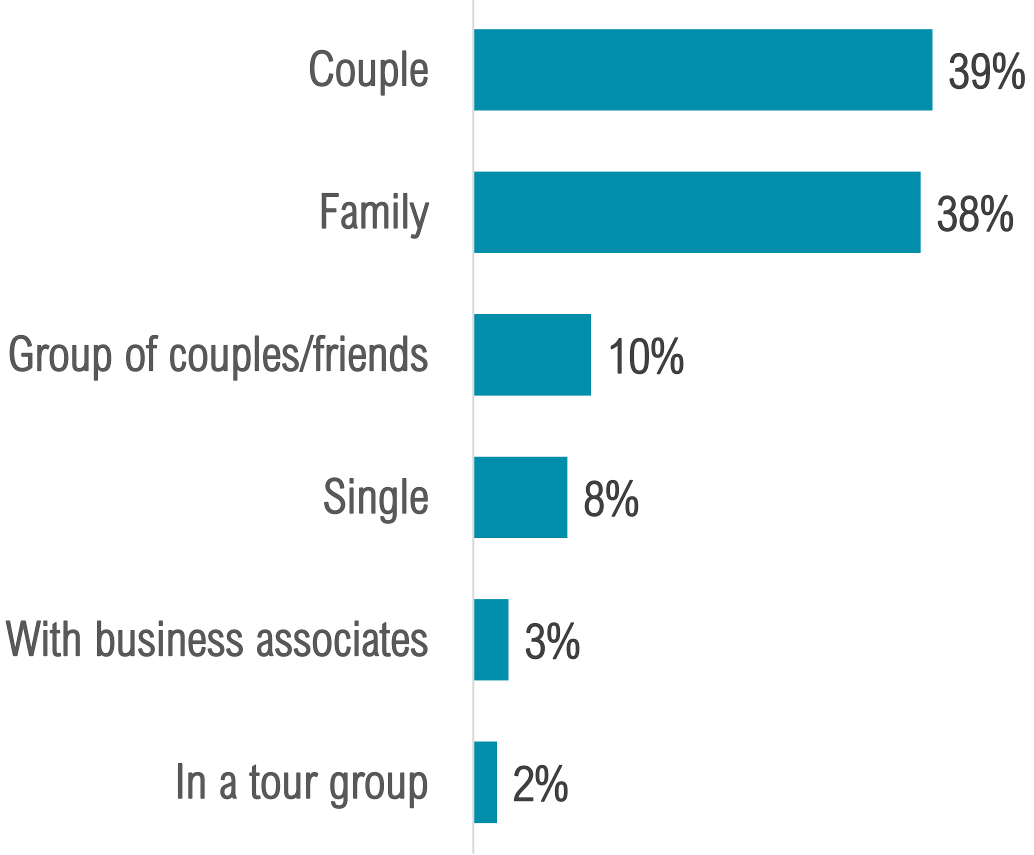
29% of visitors traveled with children under the age of 18.



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

TRAVEL PARTY TYPE

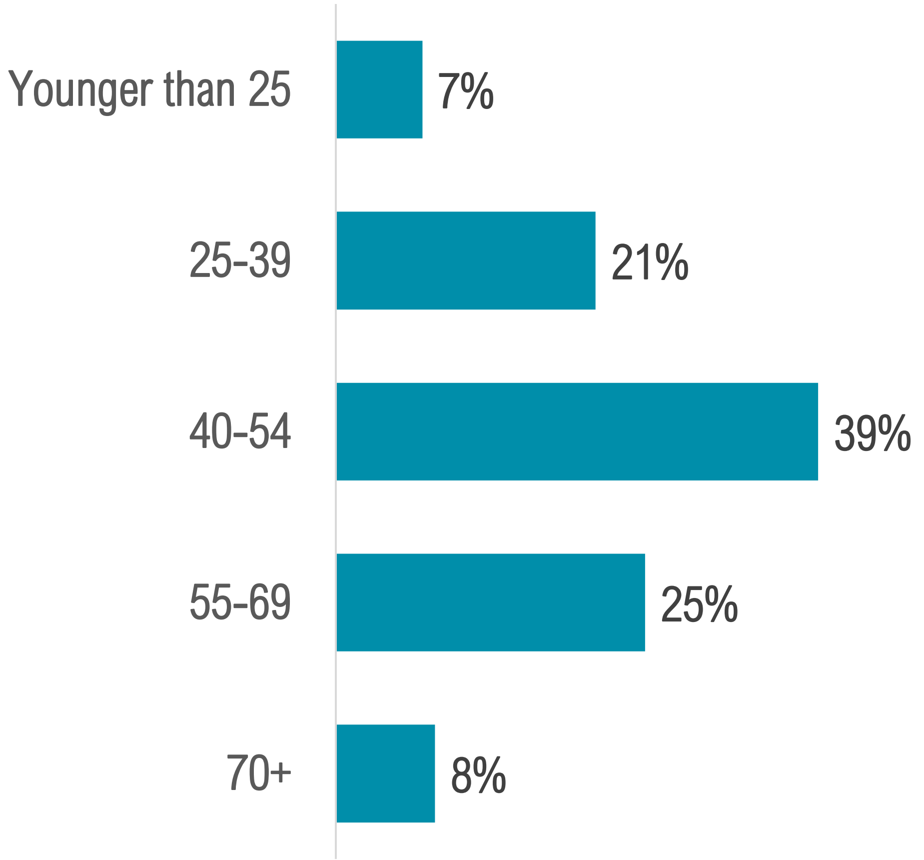
Visitors primarily traveled as a **couple** or as a **family**.



AGE

Average Age

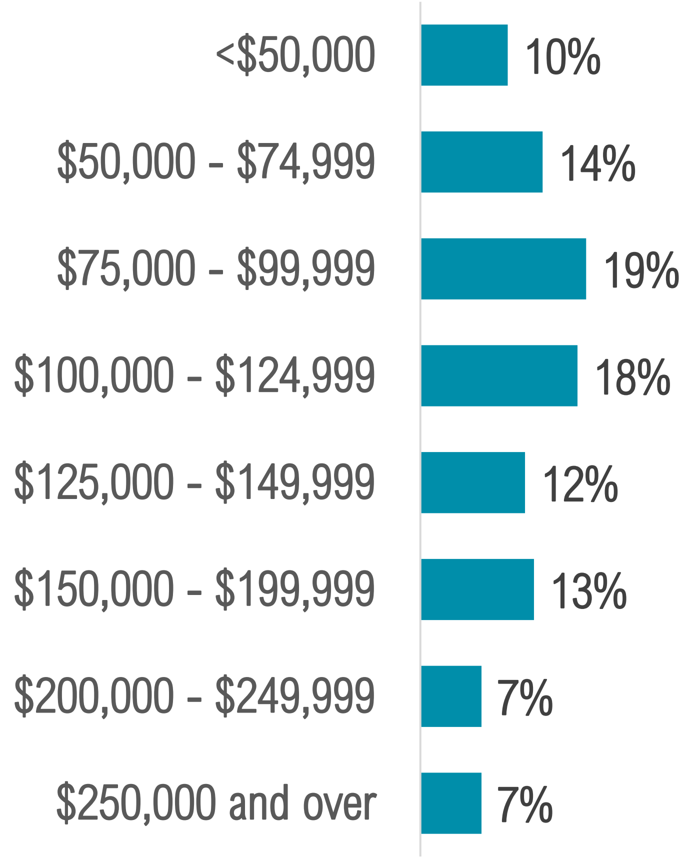
The average age of 2020 visitors was 51 years old.



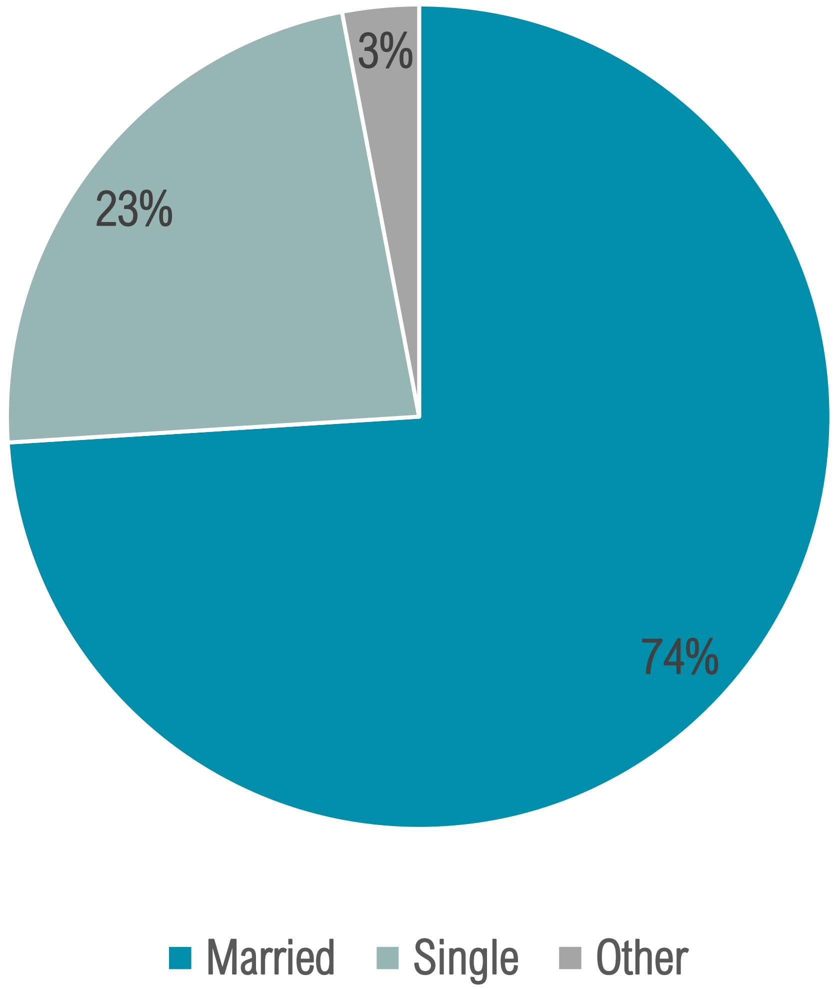
HOUSEHOLD INCOME

Median Household Income
2020 visitors had a median household income of **$109,700.**

1 in 7 visitors earned over **$200,000.**



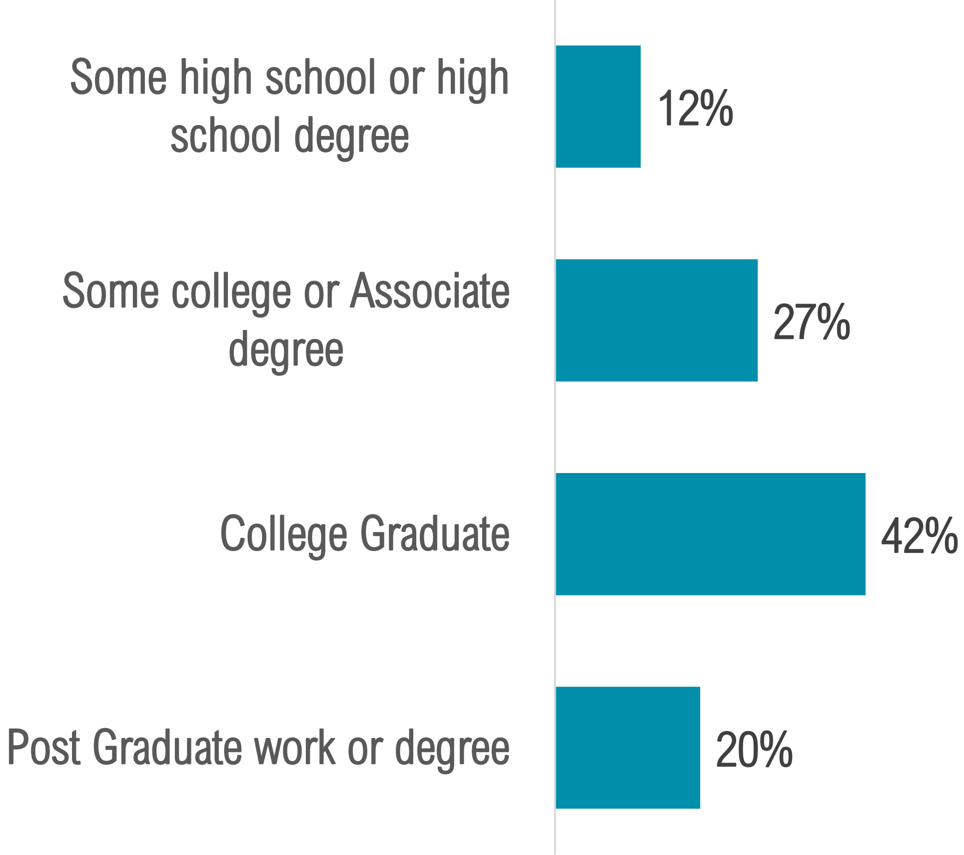
MARITAL STATUS



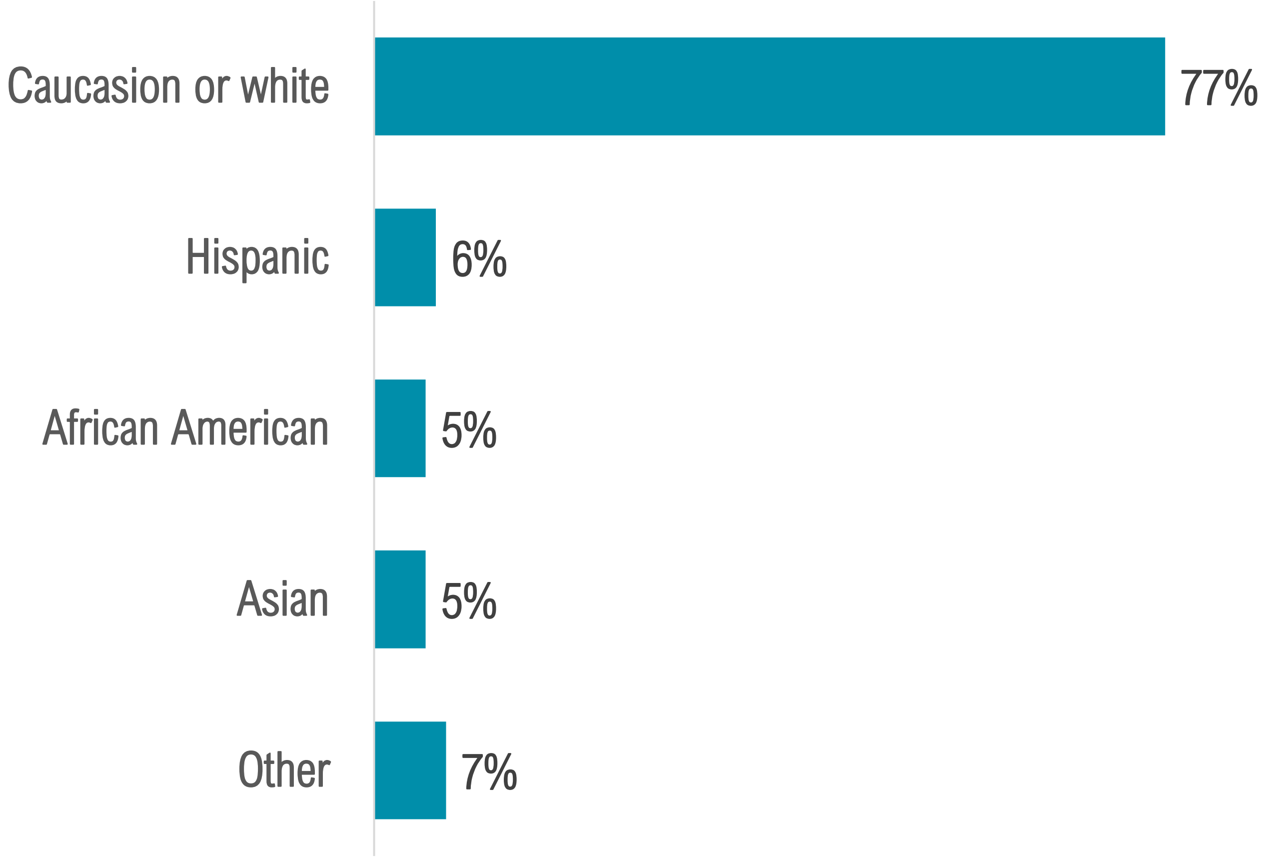
EDUCATION

College Education

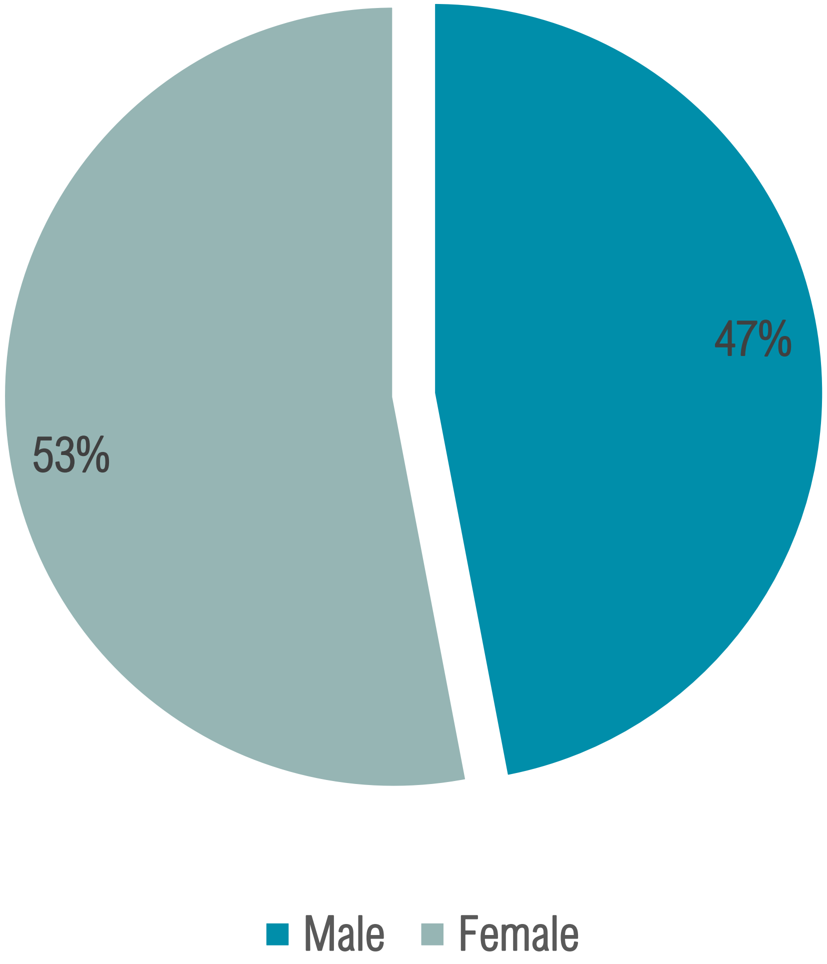
62% of 2020 visitors were college graduates.



RACE/ETHNICITY



GENDER



VISITOR JOURNEY: TRIP EXPERIENCE

Pre-Visit

Travel Party Profile

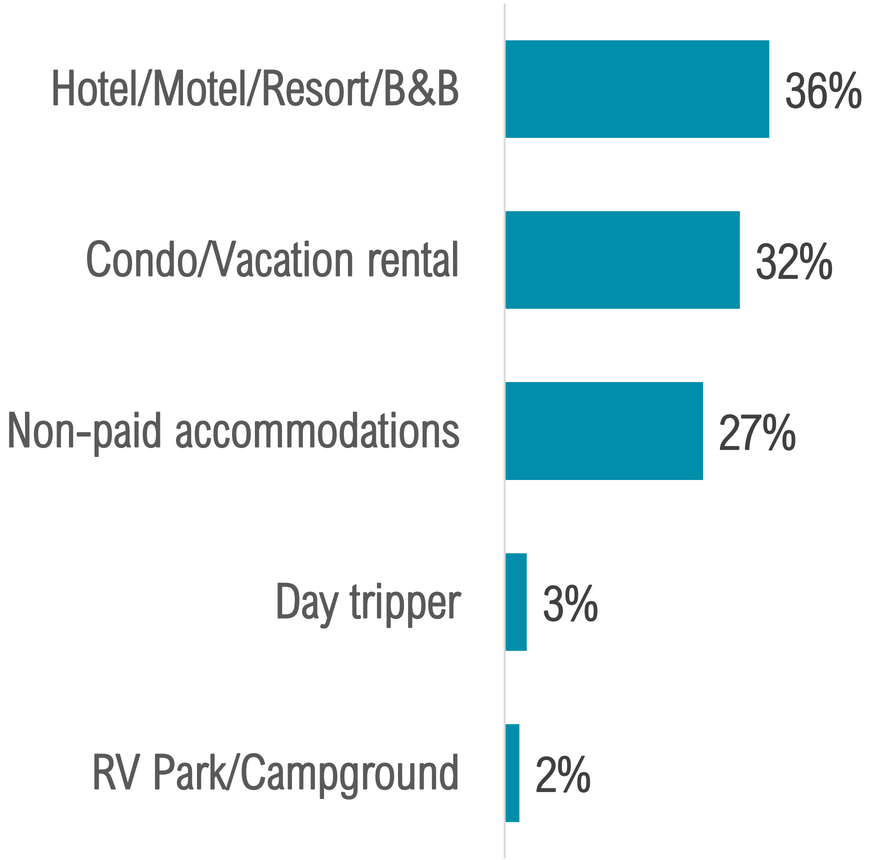
Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

ACCOMMODATIONS

7 in 10 visitors stayed in **paid accommodations** such as a hotel/motel/resort/B&B, condo/vacation rental, or a RV Park/Campground.



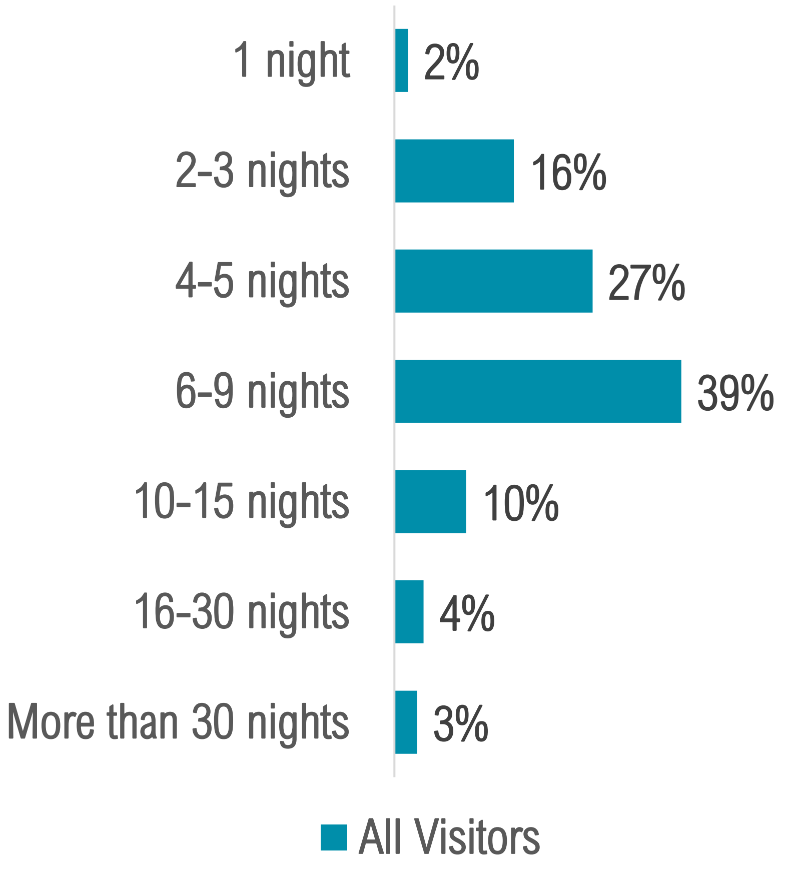
NIGHTS STAYED

All Visitors

Visitors spent 8.5[1] nights in The Beaches of Fort Myers & Sanibel.

Visitors Staying in Paid Accommodations

Visitors staying in paid accommodations spent 6.9[2] nights in The Beaches of Fort Myers & Sanibel.



[1]When including extended stay visitors, average nights stayed for all visitors was 9.5 nights.
Source: Visitor Tracking Survey
[2]When including extended stay visitors, average nights stayed for visitors staying in paid accommodations was 7.9 nights.
Source: Visitor Tracking Survey

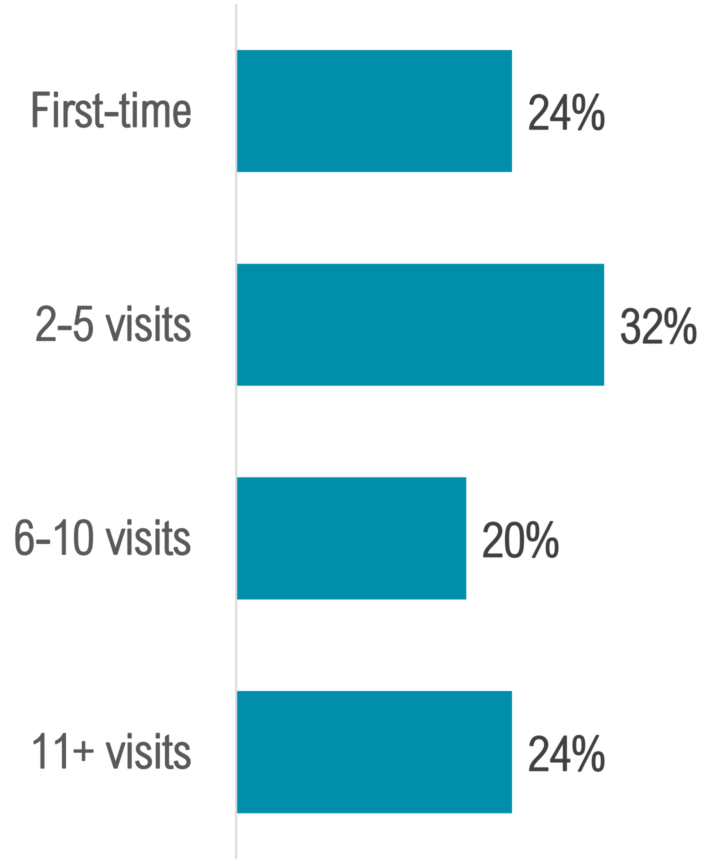
FIRST TIME AND EXPERIENCED VISITORS

First Time vs. Repeat Visitors

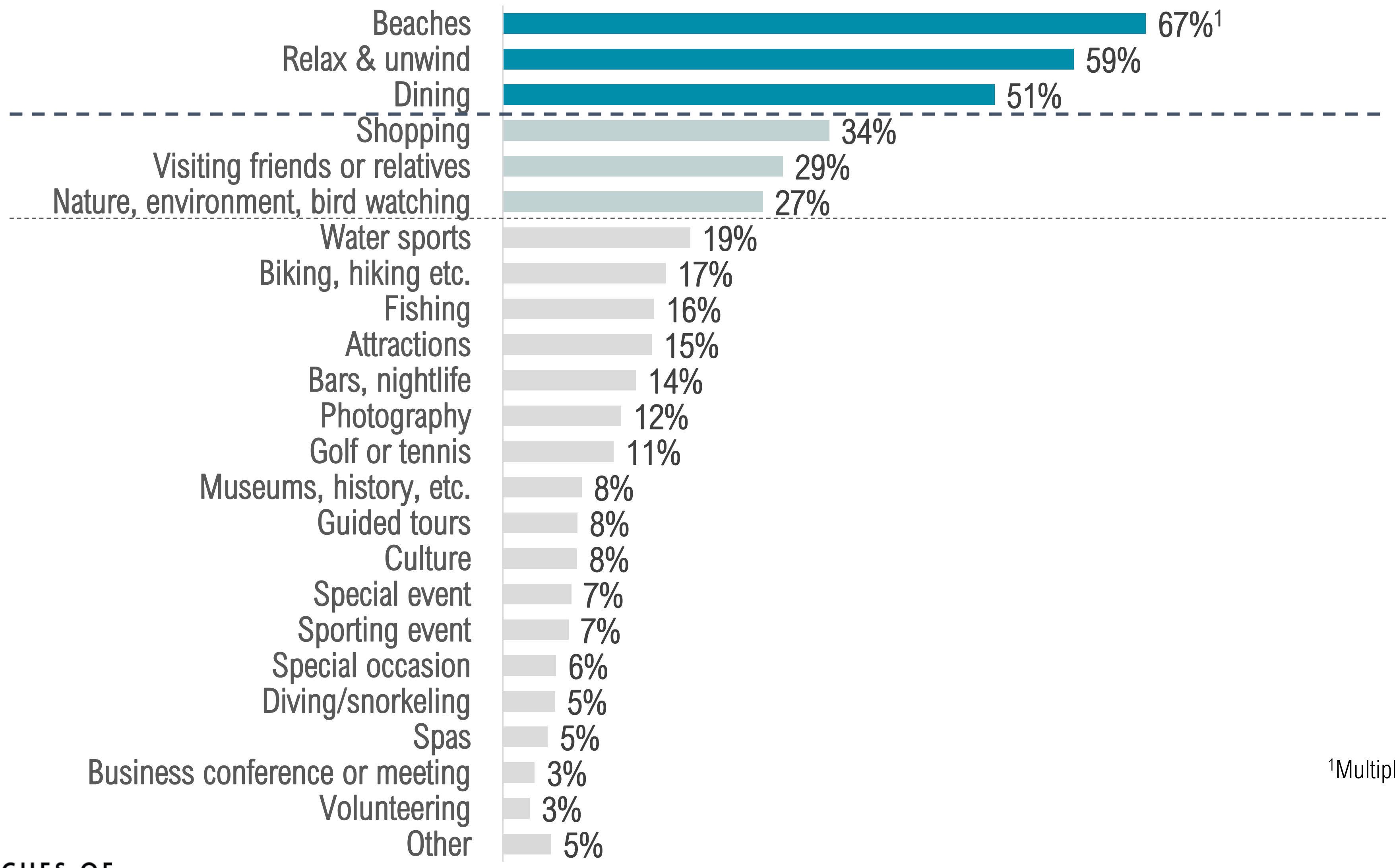
76% of visitors had previously visited the Beaches of Fort Myers & Sanibel, while 24% were visiting for the first time.

First Time vs. Repeat Visitors

1 in 4 visitors were loyalists, i.e., they had visited more than 10 times.

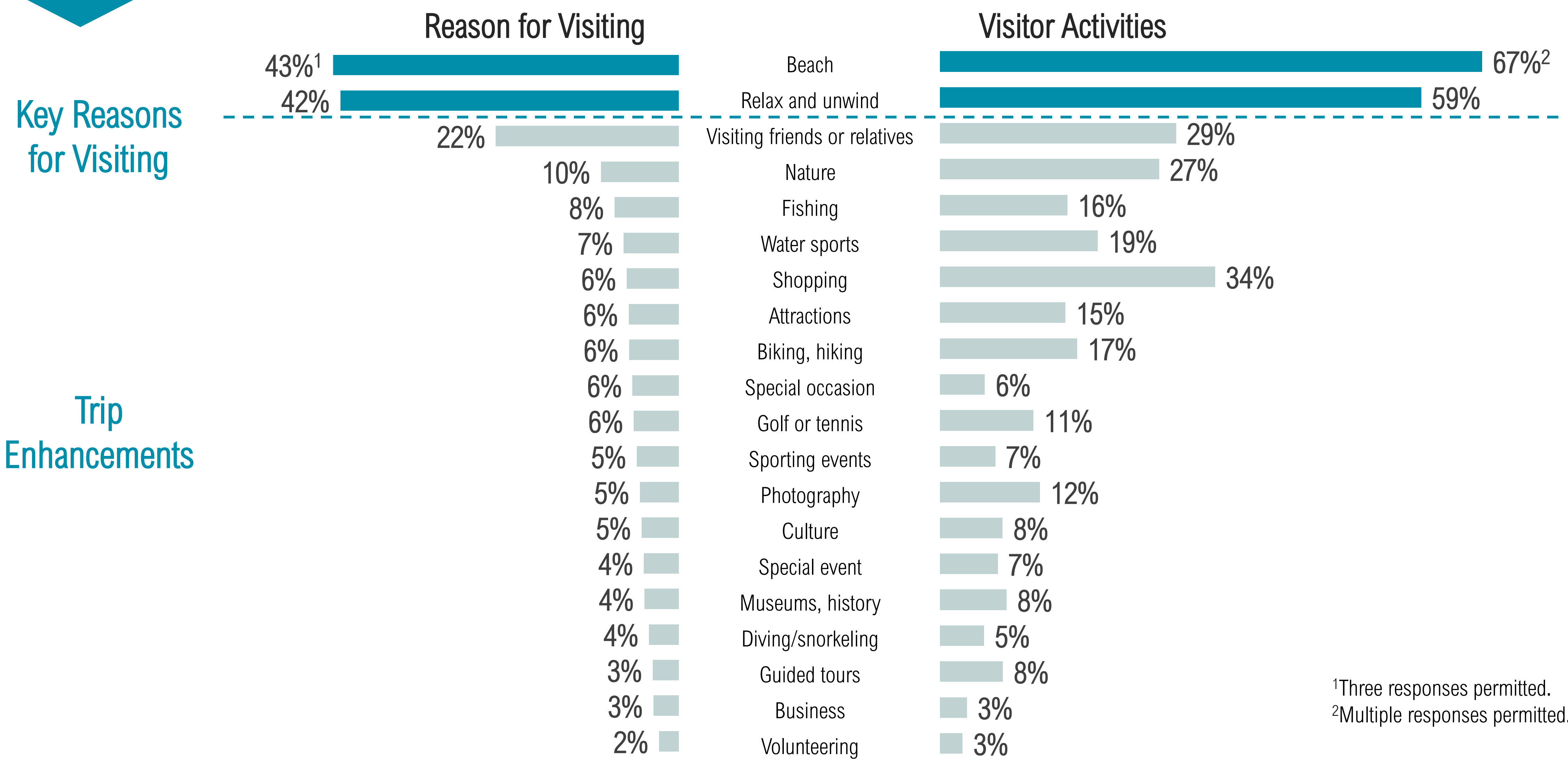


VISITOR ACTIVITIES



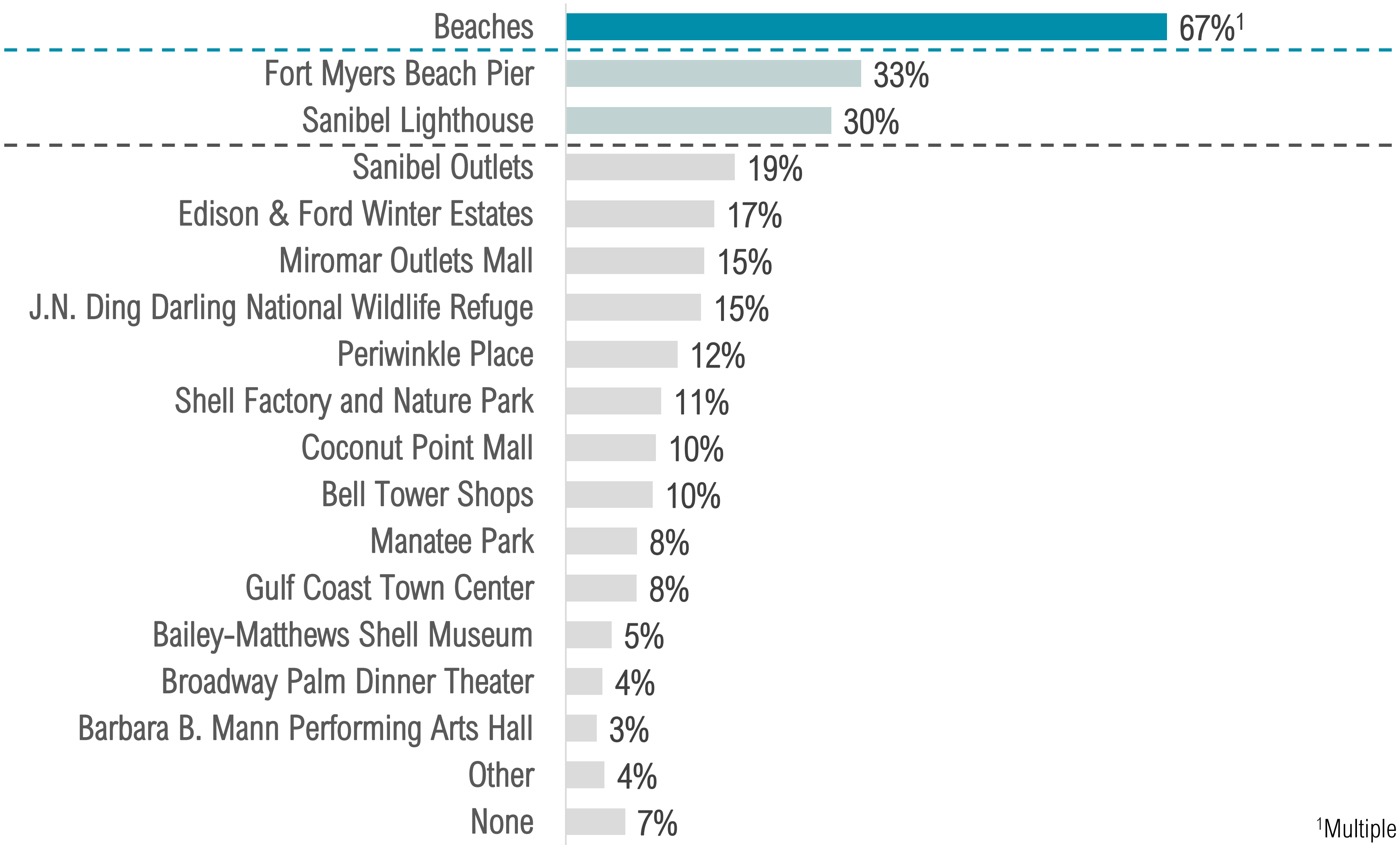
[1]Multiple responses permitted.

REASON FOR VISITING VS. VISITOR ACTIVITIES



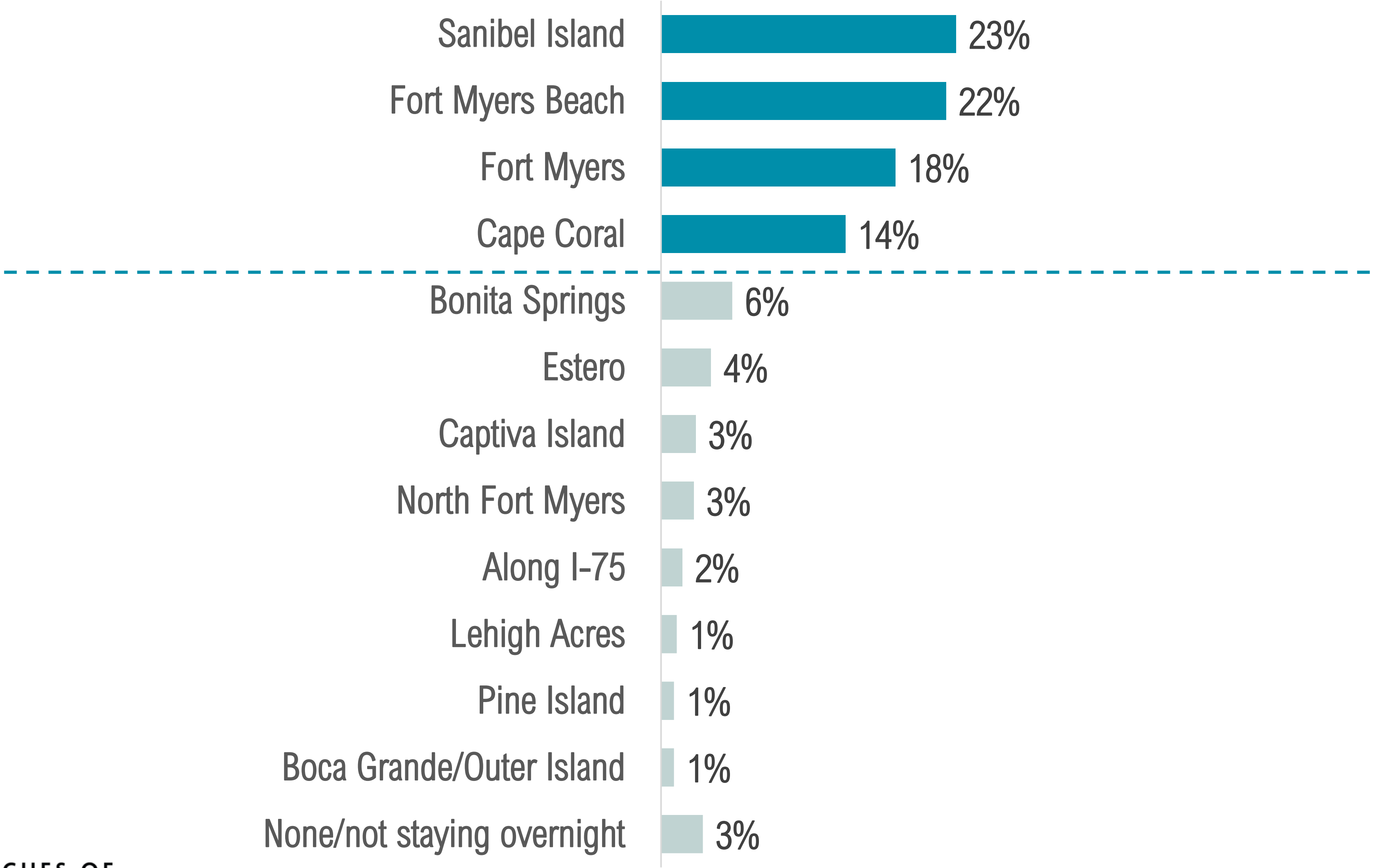
[1]Three responses permitted.
[2]Multiple responses permitted.

ATTRACTIONS VISITED



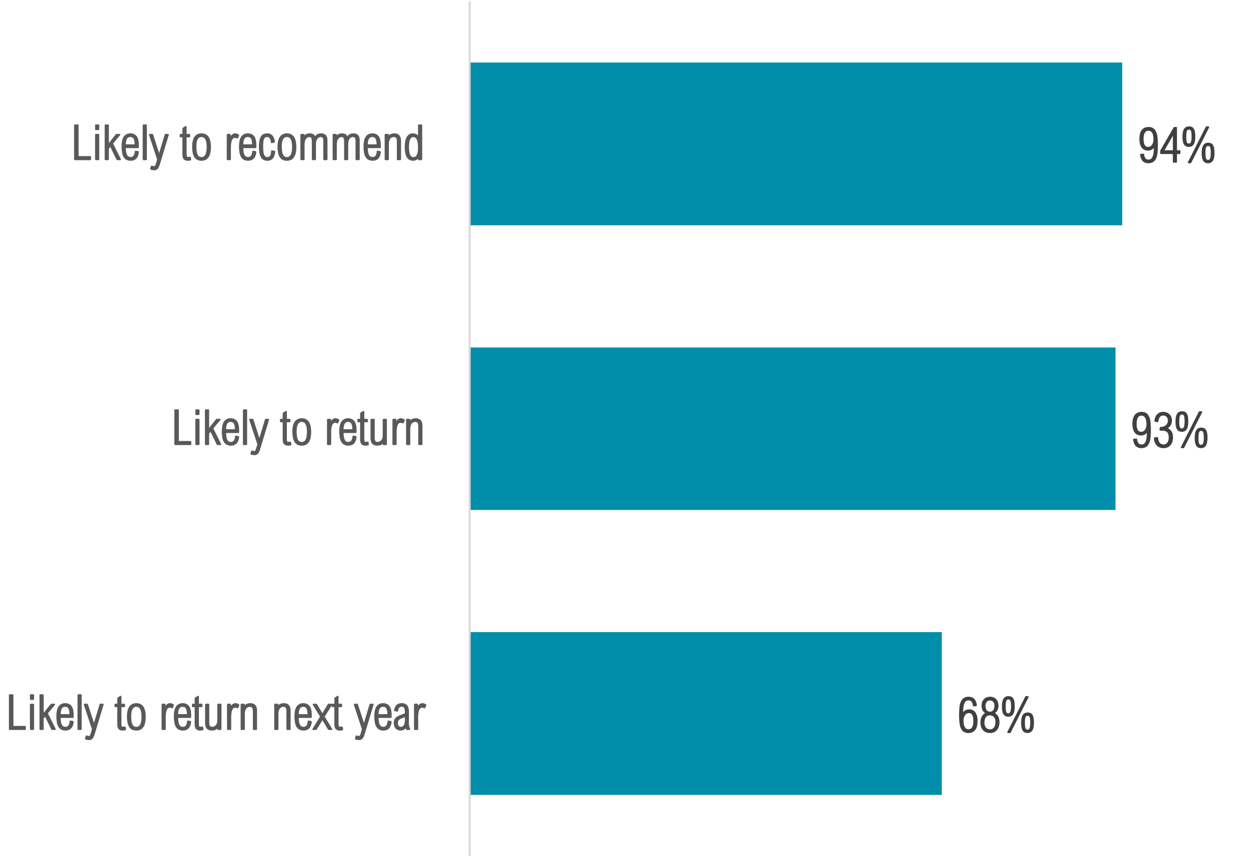
[1]Multiple responses permitted.

COMMUNITY STAYED



VISITOR JOURNEY: POST-TRIP EVALUATION

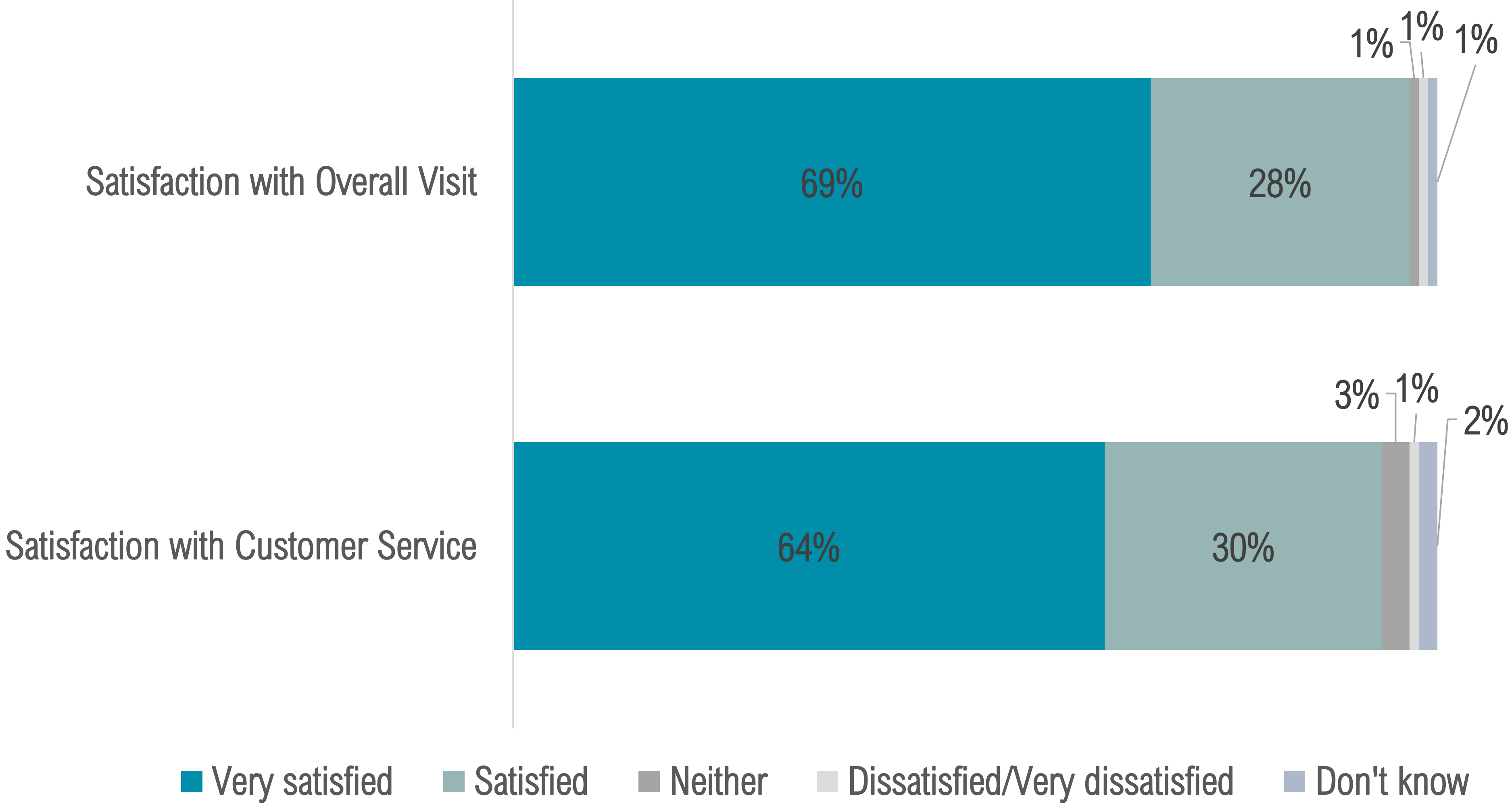
SATISFACTION



SATISFACTION RATINGS

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2019	2020	2019	2020	2019	2020	2019	2020
Likely to Recommend	88%	90%	94%	95%	92%	94%	93%	91%
Likely to Return	82%	84%	94%	95%	91%	93%	89%	85%
Likely to Return Next Year	41%	42%	73%	77%	64%	68%	65%	57%

SATISFACTION



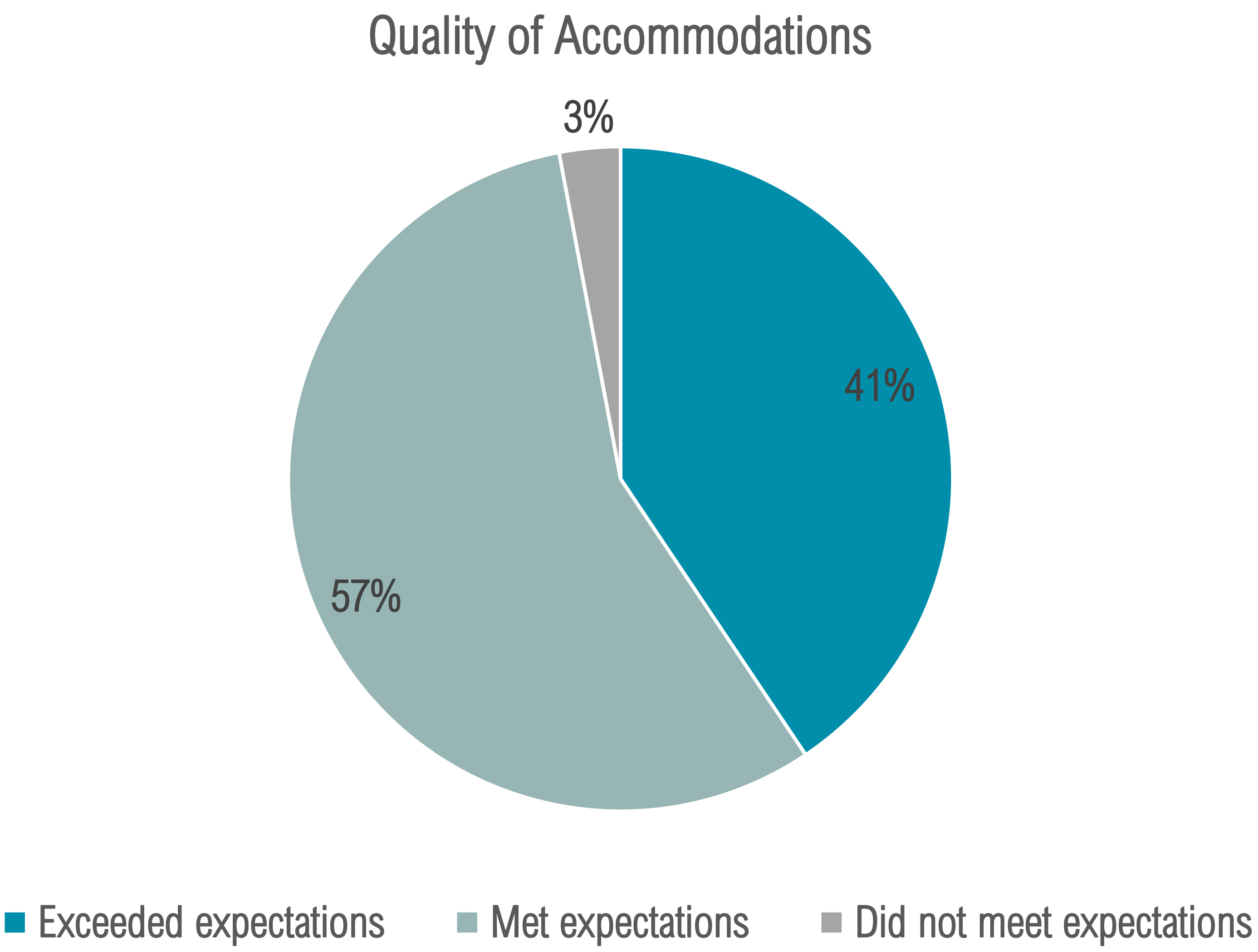
SATISFACTION RATINGS: OVERALL VISIT

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2019	2020	2019	2020	2019	2020	2019	2020
Very Satisfied	63%	64%	72%	71%	69%	69%	69%	73%
Satisfied	32%	32%	24%	26%	27%	28%	27%	24%

SATISFACTION RATINGS: CUSTOMER SERVICE

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2019	2020	2019	2020	2019	2020	2019	2020
Very Satisfied	59%	61%	62%	64%	61%	63%	64%	56%
Satisfied	32%	31%	31%	29%	32%	30%	27%	36%

SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

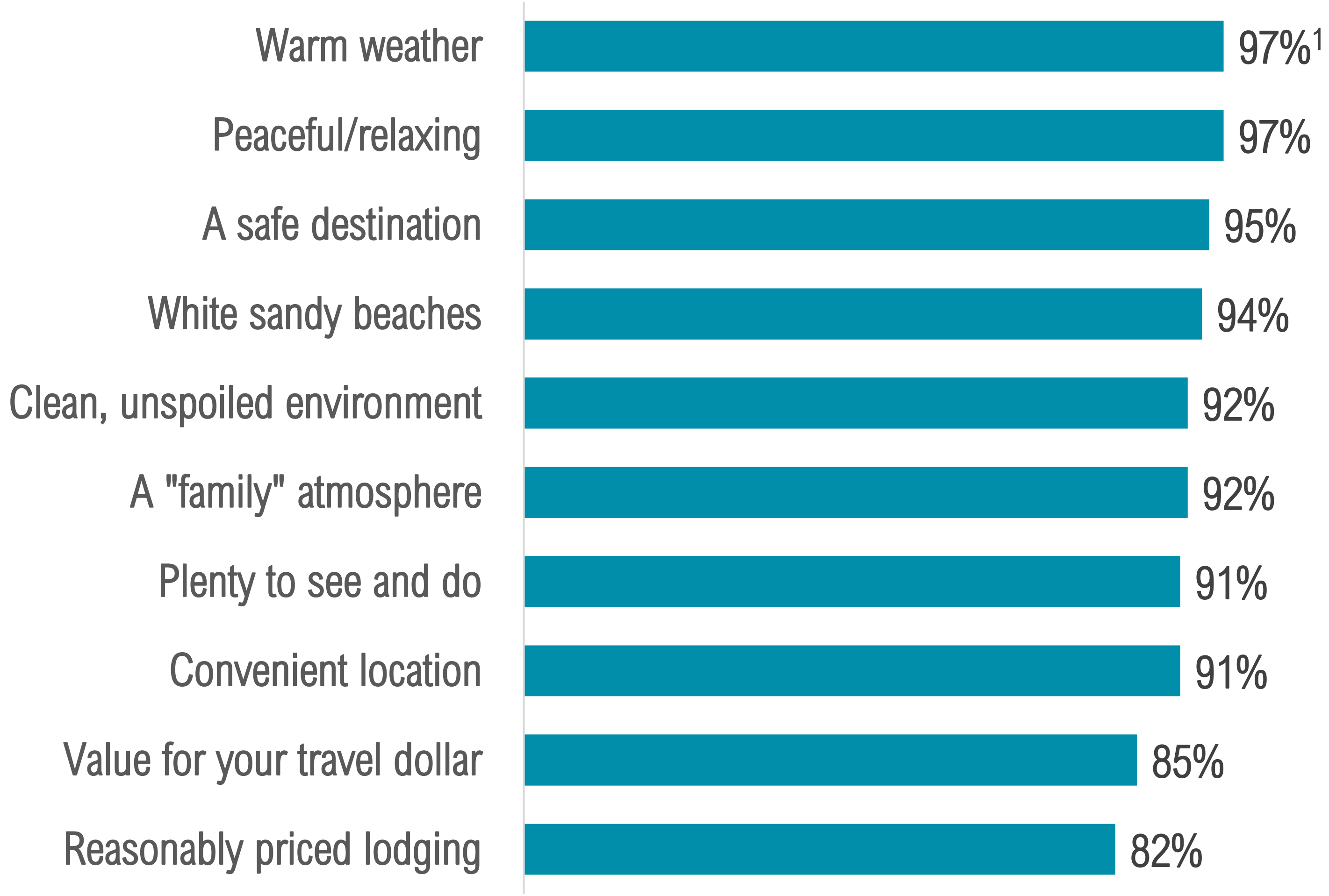


SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2019	2020	2019	2020	2019	2020	2019	2020
Exceeded Expectations	40%	45%	39%	40%	38%	41%	42%	35%
Met Expectations	57%	51%	58%	57%	59%	56%	53%	61%
Did Not Meet Expectations	3%	4%	3%	2%	2%	3%	5%	4%

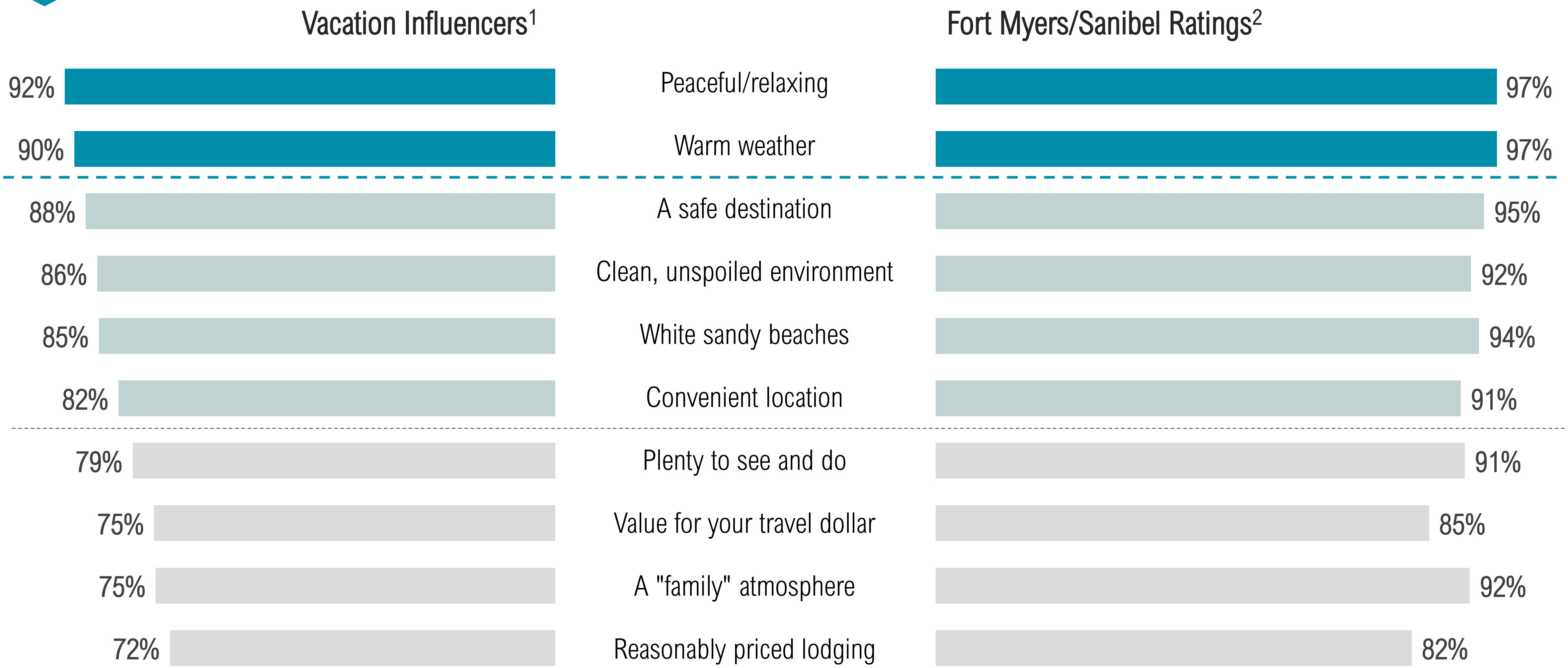
ATTRIBUTE RATINGS

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



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

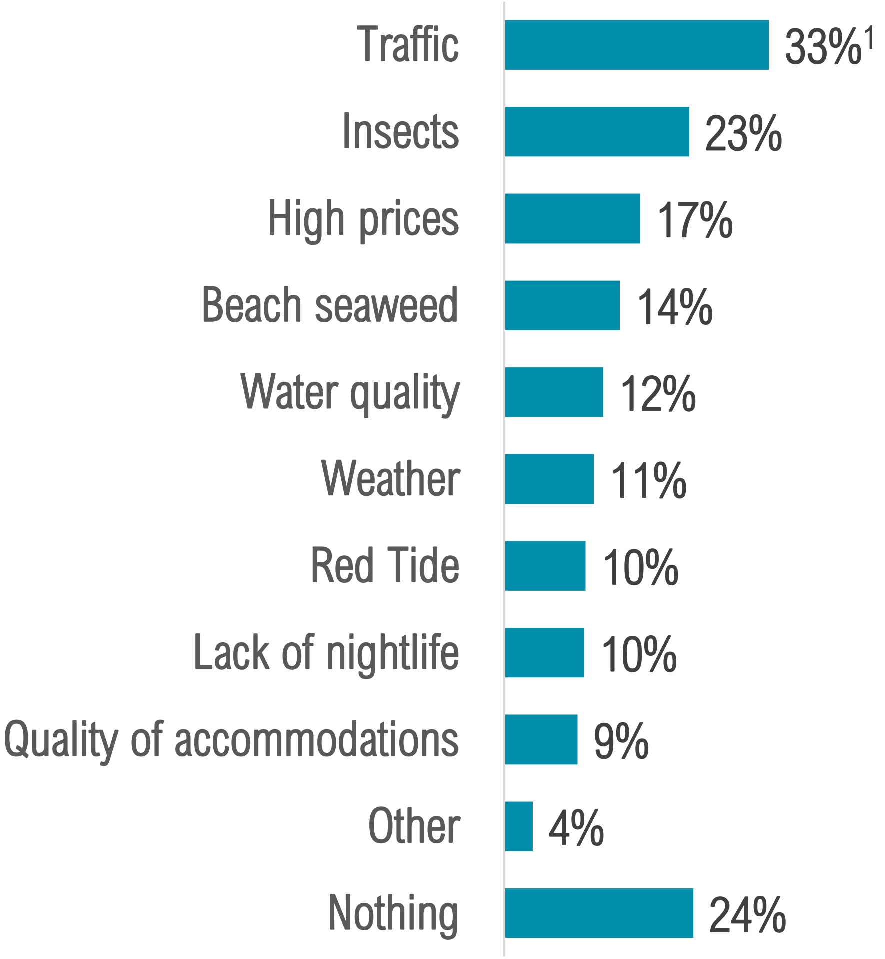
VACATION ATTRIBUTE INFLUENCE VS. RATINGS



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

VISITOR CONCERNS

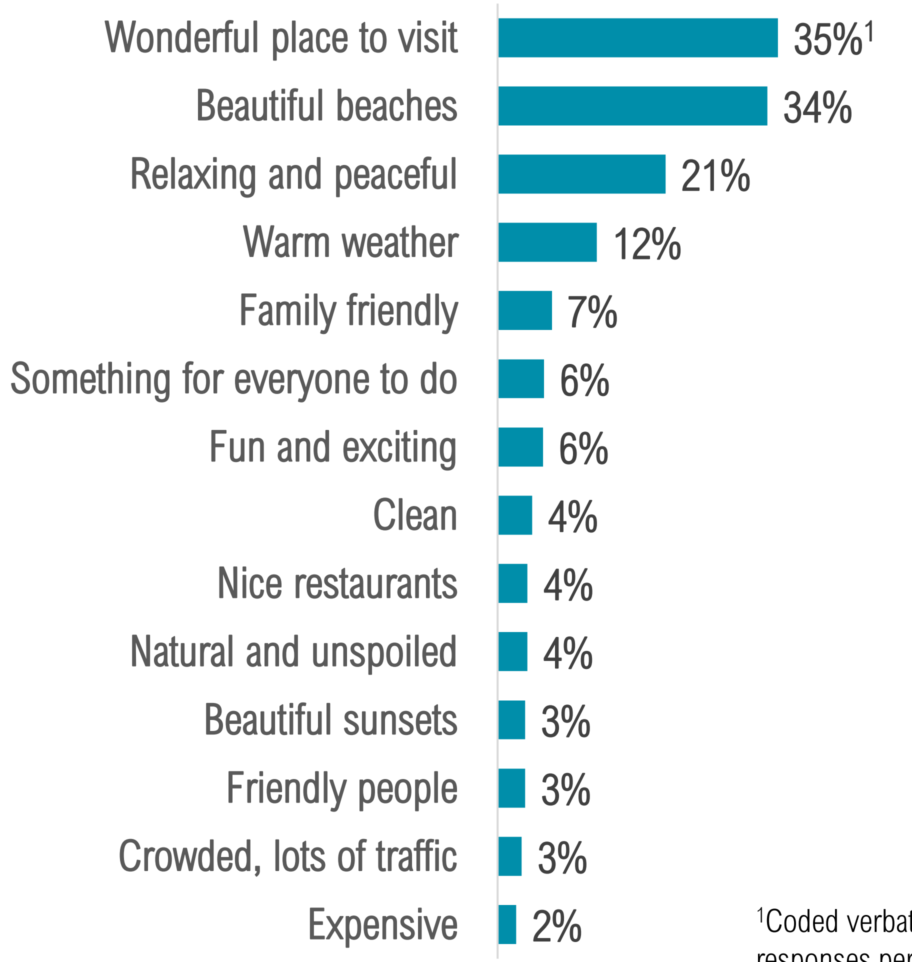
1 in 3 visitors were concerned about traffic, and nearly 1 in 4 were concerned about insects.



[1]Multiple responses permitted.

AREA DESCRIPTIONS

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



[1]Coded verbatim responses; multiple responses permitted.

AREA DESCRIPTIONS

Wonderful Place to Visit

- "Amazing place to relax and unwind as well as nice shops to shop, spas, and much more."
- "The best place in the world. My home away from home."
- "Wonderful place to stay, relax, and enjoy the beautiful beach and nature."
- "This place is our family vacation spot. I love coming here every year."

Beautiful Beaches

- "Lovely white sand beaches and a relaxing atmosphere that revolve around the rhythms of nature and the beach."
- "A beautiful place with excellent sunsets. Relaxing, do as you feel destination. A wonderful experience."
- "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 area with gorgeous crystal-clear water and great fishing and snorkeling."

AREA DESCRIPTIONS

Relaxing & Peaceful

- "A wonderful place to relax and unwind with family atmosphere away from maddening crowds."
- "This place is so relaxing and full of charm, I could forget my stresses and just live in the moment. The vacation was just amazing."
- "Very peaceful when you want to get away from stress, and people here are very calming and nice."
- "Quiet, family oriented, unspoiled by overdevelopment, eco friendly."

Warm Weather

- "Beautiful weather, beautiful beaches, we honeymooned here!"
- "Nice quiet place with great beaches and awesome weather."
- "A beautiful beach in Florida. Warm weather and a good amount of waves for fun in the water."
- "Perfect weather; not too hot, beautiful coastline, family atmosphere."

Year-Over-Year Comparisons

ECONOMIC IMPACT

Visitor & Lodging Statistics	2019	2020	% Change
Visitors	4,926,400	3,391,700	-31.2%
Room Nights	5,588,700	4,413,800	-21.0%
Direct Expenditures	$3,272,030,100	$2,631,887,000	-19.6%
Total Economic Impact	$5,313,776,900	$4,274,184,500	-19.6%
Occupancy	65.6%	57.4%	-12.5%
ADR	$142.83	$151.76	+6.3%
RevPAR	$93.70	$87.10	-7.0%
TDT	$43,493,514	$37,400,615	-14.1%

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM

	2019	2020	% Change
Direct Jobs	44,016	35,060	-20.3%
Total Jobs[1]	61,330	49,006	-20.1%
Direct Wages	$1,008,286,100	$790,077,400	-21.6%
Total Wages[1]	$1,639,842,000	$1,324,423,200	-19.2%
Direct Local Taxes	$104,070,400	$80,755,000	-22.4%
Total Local Taxes[1]	$184,427,800	$145,481,400	-21.1%
Direct State Taxes	$232,641,300	$185,745,200	-20.2%
Total State Taxes[1]	$349,016,800	$278,544,800	-20.2%

[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.

VISITOR TYPE

Visitor Type	2019	2020
Visitors in Paid Accommodations	64%	70%
Visitors in Non-Paid Accommodations	32%	27%
Day Trippers	4%	3%

PRE-VISIT

Planned trip in advance	2019	2020
1 week or less	7%	5%
2-4 weeks	9%	13%
1-2 months	20%	27%
3-6 months	30%	27%
6 months or more	30%	24%
Not sure	4%	4%

Considered Other Destinations	2019	2020
Yes	15%	16%
No	85%	84%

PRE-VISIT

Trip Planning Websites[1]	2019	2020
Airline websites	31%	28%
Search engines	19%	25%
Hotel websites	17%	20%
Booking websites/apps	16%	19%
Airbnb, VRBO, HomeAway	14%	18%
Trip Advisor	17%	17%
Vacation rental websites	11%	16%
www.FortMyers-Sanibel.com	6%	11%
Beaches of Fort Myers & Sanibel Social Media	5%	11%
Visit Florida	6%	10%
Facebook	6%	10%
Travel reviews, blogs, stories, etc.	4%	9%
Instagram	2%	6%
YouTube, Hulu, Pandora	2%	6%
Other	7%	5%
None/Don't visit websites	24%	16%

[1]Multiple responses permitted.

PRE-VISIT

Information Requests[1]	2019	2020
Call hotel/motel/condo	8%	24%
Visitor guide	3%	14%
Fort Myers-Sanibel E-newsletter	1%	12%
Call VCB	1%	10%
Call local Chamber of Commerce	2%	9%
Other	6%	4%
None/Did not request info	81%	58%

[1]Multiple responses permitted.

PRE-VISIT

Reason for Visiting	2019	2020
Vacation	54%	45%
Beach	47%	43%
Relax and unwind	47%	42%
Visiting friends or relatives	27%	22%
Nature, environment, bird watching	10%	10%
Fishing	6%	8%
Water sports	3%	7%
Shopping	4%	6%
Attractions	4%	6%
Biking, hiking, etc.	4%	6%
Special occasion	4%	6%
Golf or tennis	3%	6%
Sporting events	4%	5%
Photography	2%	5%
Culture	2%	5%
Special event	2%	4%
Museums, history	2%	4%
Diving/snorkeling	1%	4%
Guided tours	2%	3%
Business conference/meeting	2%	3%
Volunteering	0%	2%
Other	9%	5%

PRE-VISIT

Recall of Lee County Promotions	2019	2020
Yes	32%	38%
No	54%	47%
Can't recall	14%	15%

Characteristics influencing decision to visit Lee County (top 2 boxes)	2019	2020
Peaceful/relaxing	87%	92%
Warm weather	88%	90%
A safe destination	83%	88%
Clean, unspoiled environment	78%	86%
White sandy beaches	82%	85%
Convenient location	77%	82%
Plenty to see and do	75%	79%
Value for your travel dollar	69%	75%
A "family" atmosphere	71%	75%
Reasonably priced lodging	63%	72%

PRE-VISIT

Transportation	2019	2020
Fly	66%	64%
Drive a personal vehicle	29%	30%
Drive a rental vehicle	3%	3%
Drive a RV	1%	2%
Travel by bus	1%	0%
Other	1%	1%

Airport Used	2019	2020
Southwest Florida International	72%	80%
Punta Gorda	10%	9%
Ft. Lauderdale international	4%	4%
Miami International	5%	3%
Tampa International	4%	2%
Orlando International	4%	2%
Other	2%	1%

TRAVEL PARTY PROFILE

Visitor Origin	2019	2020
Florida	10%	10%
Southeast	12%	16%
Northeast	21%	19%
Midwest	38%	42%
West	5%	7%
Canada	4%	3%
United Kingdom	2%	1%
Germany	4%	1%
Other Europe	2%	<1%
Other international	2%	<1%

Visitor Origin	2019	2020
New York City	5%	6%
Chicago	5%	4%
Miami-Ft. Lauderdale	3%	4%
Detroit	2%	4%
Minneapolis-St. Paul	5%	4%
Washington D.C.-Baltimore	2%	3%
Indianapolis	3%	3%

TRAVEL PARTY PROFILE

Travel Parties	2019	2020
Mean travel party size	3.1[1]	3.4[1]
Travel with children under age 18	27%	29%

Travel Party Composition	2019	2020
Couple	42%	39%
Family	36%	38%
Group of couples/friends	9%	10%
Single	11%	8%
With business associates	1%	3%
In a tour group	1%	2%

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

TRAVEL PARTY PROFILE

Marital Status	2019	2020
Married	74%	74%
Single	21%	23%
Other	5%	3%

Age	2019	2020
Average age	54	51

Household Income	2019	2020
Median Income	$102,900	$109,700

ACCOMMODATIONS

Lodging Accommodations	2019	2020
Hotel/Motel/Resort/B&B	32%	36%
Condo/Vacation rental	31%	32%
Non-paid accommodations	31%	27%
Day tripper	4%	3%
RV Park/Campground	2%	2%

TRIP EXPERIENCE

Length of Stay	2019	2020
Average nights in The Beaches of Fort Myers & Sanibel	9.9	8.5

First time/Repeat Visitors	2019	2020
First-time	23%	24%
Repeat	77%	76%

TRIP EXPERIENCE

Activities[1]	2019	2020
Beaches	74%	67%
Relax & unwind	68%	59%
Dining	62%	51%
Shopping	44%	34%
Visiting friends/relatives	33%	29%
Nature, environment, bird watching	32%	27%
Water sports	19%	19%
Biking, hiking etc.	19%	17%
Fishing	13%	16%
Attractions	19%	15%
Bars, nightlife	15%	14%
Photography	15%	12%
Golf or tennis	13%	11%
Museums, history, etc.	8%	8%
Guided tours	6%	8%
Culture	8%	8%
Special event	8%	7%
Sporting event	7%	7%
Special occasion	4%	6%
Diving/snorkeling	3%	5%
Spas	4%	5%
Business conference or meeting	2%	3%
Volunteering	0%	3%
Other	4%	5%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Attractions[1]	2019	2020
Beaches	75%	67%
Fort Myers Beach Pier	35%	33%
Sanibel Lighthouse	30%	30%
Sanibel Outlets	19%	19%
Edison & Ford Winter Estates	24%	17%
Miromar Outlets Mall	20%	15%
J.N. Ding Darling National Wildlife Refuge	14%	15%
Periwinkle Place	12%	12%
Shell Factory and Nature Park	8%	11%
Coconut Point Mall	8%	10%
Bell Tower Shops	8%	10%
Manatee Park	5%	8%
Gulf Coast Town Center	7%	8%
Bailey-Matthews Shell Museum	2%	5%
Broadway Palm Dinner Theater	3%	4%
Barbara B. Mann Performing Arts Hall	2%	3%
Other	6%	4%
None	13%	7%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Area stayed	2019	2020
Sanibel Island	21%	23%
Fort Myers Beach	20%	22%
Fort Myers	22%	18%
Cape Coral	16%	14%
Bonita Springs	5%	6%
Estero	2%	4%
Captiva Island	3%	3%
North Fort Myers	3%	3%
Along I-75	1%	2%
Lehigh Acres	1%	1%
Pine Island	1%	1%
Boca Grande/Outer Island	1%	1%
None/not staying overnight	4%	3%

POST-TRIP EVALUATION

Loyalty metrics	2019	2020
Likely to recommend	92%	94%
Likely to return	92%	93%
Likely to return next year	66%	68%

Satisfaction with Accommodations	2019	2020
Exceeded expectations	38%	41%
Met expectations	59%	57%
Did not meet expectations	3%	3%

POST-TRIP EVALUATION

Satisfaction with Visit	2019	2020
Very satisfied	68%	69%
Satisfied	28%	28%
Neither	2%	1%
Dissatisfied/Very dissatisfied	1%	1%
Don't know	1%	1%

Satisfaction with Customer Service	2019	2020
Very satisfied	61%	64%
Satisfied	31%	30%
Neither	3%	3%
Dissatisfied/Very dissatisfied	1%	1%
Don't know	4%	2%

POST-TRIP EVALUATION

Visitor Concerns[1]	2019	2020
Traffic	30%	33%
Insects	14%	23%
High prices	10%	17%
Beach seaweed	16%	14%
Water quality	12%	12%
Weather	5%	11%
Red Tide	18%	10%
Lack of nightlife	3%	10%
Quality of accommodations	2%	9%
Other	4%	4%
Nothing	29%	24%

[1]Multiple responses permitted.

Quarterly Comparisons

ECONOMIC IMPACT

Visitor & Lodging Statistics	January – March	April – June	July – September	October – December
Visitors	1,091,300	450,200	752,400	1,097,800
Room Nights	1,599,300	646,700	846,900	1,320,900
Direct Expenditures	$1,082,785,200	$404,396,500	$500,650,800	$644,054,500
Total Economic Impact	$1,758,443,200	$656,739,900	$813,056,900	$1,045,944,500
Occupancy	78.2%	36.6%	39.7%	57.2%
ADR	$196.19	$116.73	$127.24	$138.82
RevPAR	$153.42	$42.72	$50.51	$79.41

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM

	January – March	April – June	July – September	October – December
Direct Jobs	14,551	5,371	6,529	8,609
Total Jobs[1]	20,350	7,498	9,110	12,048
Direct Wages	$326,417,300	$120,482,300	$146,615,200	$196,562,600
Total Wages[1]	$545,326,600	$206,300,000	$245,104,600	$327,692,000
Direct Local Taxes	$33,024,900	$12,981,100	$15,169,700	$19,579,300
Total Local Taxes[1]	$59,435,400	$24,036,700	$27,074,800	$34,934,500
Direct State Taxes	$76,986,000	$28,307,800	$35,045,600	$45,405,800
Total State Taxes[1]	$115,178,000	$43,344,800	$52,035,600	$67,986,400

[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.

VISITOR TYPE

Visitor Type	January – March	April – June	July – September	October – December
Visitors in Paid Accommodations	65%	66%	72%	74%
Visitors in Non-Paid Accommodations	32%	30%	26%	22%
Day Trippers	3%	4%	2%	4%

PRE-VISIT

Planned trip in advance	January – March	April – June	July – September	October – December
1 week or less	5%	9%	6%	4%
2-4 weeks	8%	15%	17%	15%
1-2 months	21%	24%	35%	30%
3-6 months	30%	25%	26%	26%
6 months or more	32%	27%	16%	20%
Not sure	3%	0%	0%	5%

Considered Other Destinations	January – March	April – June	July – September	October – December
Yes	16%	19%	12%	18%
No	84%	81%	88%	82%

PRE-VISIT

Trip Planning Websites[1]	January – March	April – June	July – September	October – December
Airline websites/apps	28%	23%	22%	34%
Search engines	20%	23%	31%	27%
Hotel websites/apps	19%	19%	17%	22%
Trip Advisor	17%	16%	20%	16%
Airbnb, VRBO, HomeAway	16%	16%	21%	19%
Booking websites/apps	15%	18%	22%	21%
Vacation rental websites/apps	14%	14%	16%	18%
Visit Florida	9%	15%	10%	10%
Facebook	9%	11%	11%	11%
www.FortMyers-Sanibel.com	9%	14%	12%	10%
Travel reviews, blogs, stories	7%	9%	10%	9%
Beaches of Fort Myers & Sanibel social media	6%	12%	13%	13%
Instagram	5%	5%	8%	6%
YouTube, Hulu, Pandora	5%	6%	6%	6%
Other	5%	5%	3%	5%
None/Don't visit websites	19%	19%	10%	15%

[1]Multiple responses permitted.

PRE-VISIT

Information Requests[1]	January – March	April – June	July – September	October – December
Call hotel/motel/condo	18%	15%	31%	28%
Visitor guide	11%	10%	19%	15%
Fort Myers-Sanibel E-newsletter	8%	9%	19%	12%
Call VCB	7%	8%	16%	9%
Call local Chamber of Commerce	6%	7%	15%	10%
Other	4%	5%	3%	3%
None	67%	71%	46%	52%

[1]Multiple responses permitted.

PRE-VISIT

Recall of Lee County Promotions	January – March	April – June	July – September	October – December
Yes	40%	38%	36%	38%
No	48%	47%	43%	48%
Can't recall	12%	15%	20%	14%

Characteristics influencing decision to visit Lee County (top 2 boxes)	January – March	April – June	July – September	October – December
Warm weather	93%	87%	82%	93%
Peaceful/relaxing	87%	89%	96%	94%
A safe destination	83%	86%	92%	90%
Clean, unspoiled environment	81%	81%	91%	88%
White sandy beaches	81%	83%	87%	89%
Convenient location	78%	79%	83%	85%
Plenty to see and do	76%	79%	80%	81%
Value for your travel dollar	69%	72%	79%	79%
A "family" atmosphere	67%	73%	80%	79%
Reasonably priced lodging	63%	71%	78%	77%

PRE-VISIT

Transportation	January – March	April – June	July – September	October – December
Fly	70%	61%	55%	65%
Drive a personal vehicle	25%	32%	41%	27%
Drive a rental vehicle	2%	4%	2%	4%
Drive a RV	1%	1%	1%	3%
Travel by bus	1%	0%	0%	0%
Other	1%	0%	1%	1%

Airport Used	January – March	April – June	July – September	October – December
Southwest Florida International	80%	77%	86%	77%
Punta Gorda	7%	8%	9%	10%
Ft. Lauderdale international	3%	3%	1%	6%
Miami International	4%	5%	1%	2%
Tampa International	3%	2%	1%	3%
Orlando International	2%	3%	1%	2%
Other	1%	1%	1%	0%

TRAVEL PARTY PROFILE

Visitor Origin	January – March	April – June	July – September	October – December
Florida	4%	14%	18%	10%
Southeast	12%	15%	20%	19%
Northeast	24%	19%	19%	15%
Midwest	47%	36%	37%	42%
West	4%	7%	5%	10%
Canada	5%	4%	<1%	2%
United Kingdom	1%	1%	1%	<1%
Germany	1%	2%	<1%	1%
Other Europe	1%	1%	<1%	<1%
Other International	1%	1%	<1%	<1%

TRAVEL PARTY PROFILE

Visitor Origin	January – March	April – June	July – September	October – December
New York City	5%	4%	9%	5%
Chicago	3%	4%	5%	5%
Miami-Ft. Lauderdale	1%	6%	9%	2%
Detroit	4%	3%	4%	3%
Minneapolis-Saint Paul	7%	4%	3%	2%
Washington D.C.-Baltimore	3%	2%	5%	3%
Indianapolis	3%	2%	2%	3%
Cleveland-Akron	2%	2%	3%	2%
Boston	4%	2%	2%	1%
Grand Rapids	2%	2%	2%	2%
Green Bay-Appleton, WI	3%	1%	1%	2%
Atlanta	1%	2%	3%	2%
Milwaukee	1%	2%	1%	3%
Cincinnati	4%	2%	5%	1%
Nashville	2%	1%	3%	1%
St. Louis	1%	2%	2%	2%
Philadelphia	2%	2%	2%	1%
Tampa-Clearwater-St. Pete	1%	2%	3%	1%
Pittsburgh	1%	2%	3%	1%
Columbus, OH	1%	1%	3%	1%
Louisville	1%	1%	3%	1%
Orlando	1%	2%	2%	1%

TRAVEL PARTY PROFILE

Travel Parties	January – March	April – June	July – September	October – December
Mean travel party size[1]	3.1	3.6	3.8	3.4
Travel with children under age 18	22%	30%	38%	29%

Travel Party Composition	January – March	April – June	July – September	October – December
Couple	48%	38%	30%	36%
Family	27%	38%	51%	40%
Single	11%	10%	6%	9%
Group of couples/friends	10%	11%	9%	9%
In a tour group	2%	2%	1%	1%
With business associates	2%	1%	3%	5%

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

TRAVEL PARTY PROFILE

Marital Status	January – March	April – June	July – September	October – December
Married	74%	72%	75%	74%
Single	21%	28%	25%	23%
Other	5%	0%	0%	3%

Age	January – March	April – June	July – September	October – December
Average age	53	49	47	52

Household Income	January – March	April – June	July – September	October – December
Median Income	$118,300	$97,200	$111,300	$106,000

TRIP EXPERIENCE

Length of Stay	January – March	April – June	July – September	October – December
Average nights in The Beaches of Fort Myers & Sanibel	10.5	7.8	8.7	6.6

First time/Repeat Visitors	January – March	April – June	July – September	October – December
First-time	20%	26%	27%	24%
Repeat	80%	74%	73%	76%

TRIP EXPERIENCE

Activities[1]	January – March	April – June	July – September	October – December
Beaches	62%	68%	69%	69%
Relax & unwind	60%	67%	55%	58%
Dining	56%	56%	45%	48%
Shopping	35%	36%	32%	33%
Visiting friends or relatives	34%	32%	23%	27%
Nature, environment, bird watching	25%	28%	29%	27%
Attractions	20%	16%	12%	13%
Bars, nightlife	17%	14%	13%	11%
Biking, hiking etc.	17%	15%	16%	18%
Water sports	16%	15%	23%	22%
Golf or tennis	13%	8%	9%	13%
Photography	12%	14%	12%	12%
Sporting event	11%	4%	5%	5%
Fishing	10%	17%	18%	19%
Museums, history, etc.	10%	6%	7%	8%
Culture	10%	9%	6%	6%
Guided tours	8%	10%	7%	7%
Special event	7%	6%	5%	9%
Spas	4%	3%	6%	5%
Special occasion	4%	2%	6%	8%
Diving/snorkeling	3%	7%	7%	6%
Business conference or meeting	3%	1%	4%	4%
Volunteering	2%	1%	3%	4%
Other	4%	3%	3%	5%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Attractions[1]	January – March	April – June	July – September	October – December
Beaches	60%	69%	69%	69%
Fort Myers Beach Pier	35%	35%	33%	30%
Sanibel Lighthouse	27%	29%	33%	30%
Edison & Ford Winter Estates	20%	17%	12%	16%
Sanibel Outlets	17%	20%	19%	20%
Miromar Outlets Mall	17%	15%	14%	15%
J.N. Ding Darling National Wildlife Refuge	17%	14%	13%	15%
Periwinkle Place	12%	11%	10%	15%
Coconut Point Mall	10%	11%	8%	11%
Manatee Park	10%	10%	8%	5%
Shell Factory and Nature Park	9%	13%	11%	11%
Bell Tower Shops	9%	10%	7%	12%
Gulf Coast Town Center	7%	7%	8%	9%
Broadway Palm Dinner Theater	6%	3%	2%	4%
Bailey-Matthews Shell Museum	5%	4%	3%	7%
Barbara B. Mann Performing Arts Hall	5%	3%	2%	3%
Other	6%	4%	4%	3%
None	7%	9%	7%	5%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Area stayed	January – March	April – June	July – September	October – December
Sanibel Island	21%	25%	24%	23%
Fort Myers Beach	21%	19%	24%	23%
Fort Myers	18%	19%	15%	20%
Cape Coral	16%	17%	15%	11%
Bonita Springs	6%	4%	5%	6%
Estero	5%	3%	4%	3%
North Fort Myers	3%	2%	3%	2%
Captiva Island	2%	3%	3%	3%
Along I-75	2%	1%	1%	2%
Lehigh Acres	1%	1%	2%	1%
Pine Island	1%	1%	1%	1%
Boca Grande/Outer Island	1%	1%	1%	1%
None/not staying overnight	3%	4%	2%	4%

POST-TRIP EVALUATION

Loyalty metrics	January – March	April – June	July – September	October – December
Likely to recommend	95%	92%	94%	93%
Likely to return	94%	94%	94%	90%
Likely to return next year	74%	70%	66%	64%

Satisfaction with Accommodations	January – March	April – June	July – September	October – December
Exceeded expectations	34%	41%	43%	45%
Met expectations	63%	56%	55%	52%
Did not meet expectations	3%	3%	2%	3%

POST-TRIP EVALUATION

Satisfaction with Visit	January – March	April – June	July – September	October – December
Very satisfied	69%	71%	64%	69%
Satisfied	28%	25%	32%	28%
Neither	1%	2%	2%	1%
Dissatisfied/Very dissatisfied	1%	1%	1%	1%
Don't know	1%	1%	1%	1%

Satisfaction with Customer Service	January – March	April – June	July – September	October – December
Very satisfied	62%	63%	61%	66%
Satisfied	31%	28%	32%	28%
Neither	3%	5%	4%	3%
Dissatisfied/Very dissatisfied	1%	1%	1%	1%
Don't know	3%	3%	2%	2%

POST-TRIP EVALUATION

Visitor Concerns[1]	January – March	April – June	July – September	October – December
Traffic	50%	32%	21%	25%
High prices	15%	14%	14%	22%
Insects	13%	23%	35%	25%
Beach seaweed	9%	17%	20%	15%
Red Tide	8%	12%	8%	13%
Water quality	8%	11%	17%	14%
Weather	7%	7%	14%	15%
Lack of nightlife	7%	7%	13%	12%
Quality of accommodations	5%	4%	11%	14%
Other	4%	5%	3%	3%
Nothing	25%	27%	22%	22%

[1]Multiple responses permitted.

Methodology

METHODOLOGY

- Economic Impact of tourism in Lee County is derived from:
  - Visitor Tracking Study
    - Internet survey & in-person[1] interviews in public areas, hotels, & at events around Lee County
    - Sample size: 3,822 completed interviews
    - Target individuals: Calendar Year 2020 visitors to Lee County
    - Data Collection: January 2020 – December 2020
  - Occupancy Study
    - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc., and the STR Report
    - Sample Size – quarterly survey data from 379 properties reporting to DSG, and 334 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

[1]No in-person interviews were conducted in April or May due to COVID-19.

METHODOLOGY

- **3,822** visitor interviews were completed in the following areas:

972	Fort Myers Beach: The Pier, Times Square
1,378	Fort Myers: Centennial Park, RSW, Edison-Ford Winter Estates, Hampton Inn & Suites Fort Myers
851	Sanibel: Lighthouse Beach, Sanibel Moorings Resort
458	Cape Coral/North Fort Myers: Yacht Club Community Park, The Shell Factory and Nature Park
163	Bonita Springs: Bonita Beach

The Beaches of Fort Myers & Sanibel

Lee County VCB

Calendar Year 2020

Visitor Tracking, Occupancy & Economic Impact Study

Tamara Pigott, CDME
Executive Director

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

downs & st. germain RESEARCH