Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

Calendar Year 2021

Visitor Tracking, Occupancy & Economic Impact Study

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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

Executive Summary

ANNUAL SNAPSHOT

January – December 2021

- Tourism is booming, with all economic impact metrics **exceeding CY 2020**
- CY 2021 visitors were more likely to consider vacation destinations outside of Florida when planning their trips
- Spending per person is up **24%** from 5 years ago
- More CY 2021 visitors **flew** to the Fort Myers area
- More CY 2021 visitors **traveled with children** under age 18 compared to 2020
- CY 2021 visitors were more likely to travel as a **family**
- CY 2021 visitors in paid accommodations **stayed longer**

69.5%	$158.51	$110.16
OCCUPANCY RATE	AVERAGE DAILY RATE	REVENUE PER ROOM
↑ 31.4% from 2020	↑ 9.5% from 2020	↑ 43.9% from 2020

fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

downs & st. germain RESEARCH

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

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

DIRECT SPENDING

Visitors who traveled to the Fort Myers area in CY 2021 spent

$3,729,946,900

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

An increase of **41.7%.**

TOURISM MATTERS TO LEE COUNTY

Visitor spending in CY 2021 generated a total economic impact of

$5,945,535,400

in the Fort Myers area.

An increase of **39.1%.**

VISITORS

The Fort Myers area attracted

4,687,500

visitors in CY 2021.

An increase of **38.2%.**

ROOM NIGHTS

The Fort Myers area visitors generated

6,394,800

room nights in paid accommodations in CY 2021.

An increase of **44.9%.**

JOBS & WAGES

Tourism in the Fort Myers area supported

69,174 (+41.2%)

local jobs in CY 2021, generating

$1,844,217,000 (+39.2%)

in wages and salaries.

VISITORS SUPPORT JOBS

An additional Lee County job
is supported by every

68

visitors

TOURIST DEVELOPMENT TAX

Paid accommodations and vacation rentals by visitors to the Fort Myers area in CY 2021 generated

$57,528,841

in TDT collected

An increase of **53.8%.**

HOUSEHOLD SAVINGS[1]

Visitors to the Fort Myers area
save local residents

$2,139

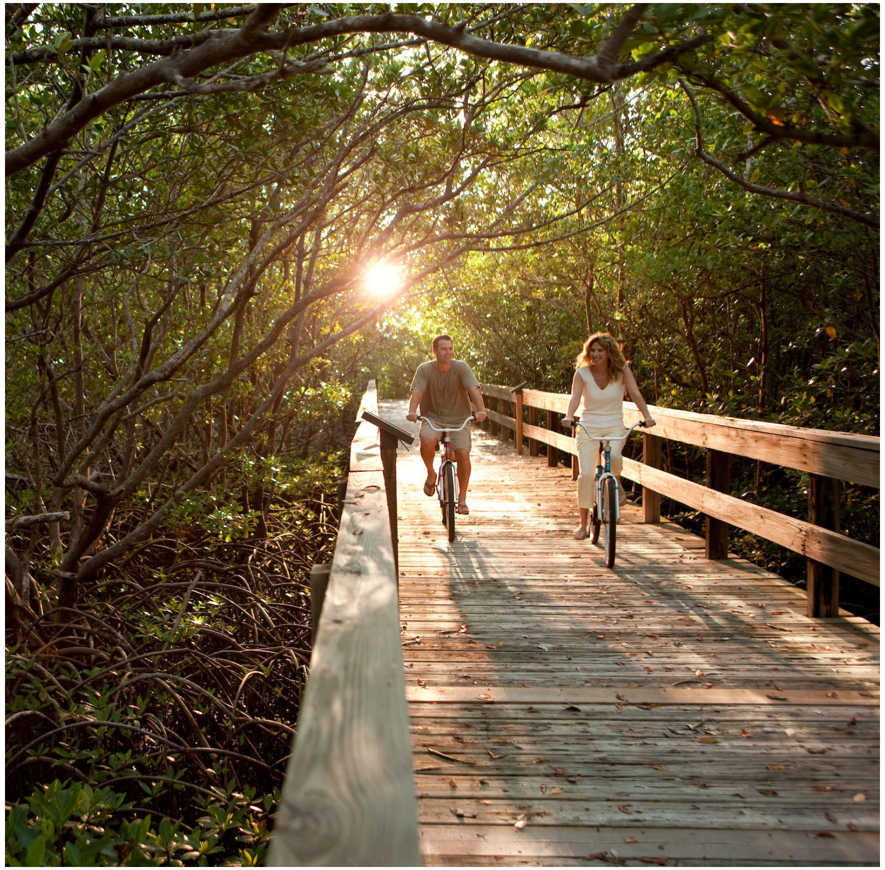
per household every year
in state and local taxes

MARKETING SPENDING

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

$301

in visitor spending within Lee County



[1]The Lee County VCB's marketing budget for FY2021 was $12,409,715.

CALENDAR YEAR LODGING STATISTICS

69.5%	$158.51	$110.16
Occupancy	ADR	RevPAR
31.4%	9.5%	43.9%

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 Fort Myers area at least 3 months in advance
- → Nearly 2 in 5 visitors requested information from local organizations to plan their trips
  - → 1 in 4 visitors called a hotel/motel/condo when planning their trips
- → 26% of visitors considered choosing other destinations when planning their trips

TRIP PLANNING: TOP WEBSITES USED

- Over 4 in 5 visitors used websites and apps to plan their trips to the Fort Myers area
- Top websites and apps used to plan their trips include[1]:

28% Airbnb, VRBO, Homeaway, or similar website

26% Airline websites

26% Search engines

[1]Multiple responses permitted.

TOP TRIP INFLUENCERS

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

92% Warm weather

92% Peaceful/relaxing

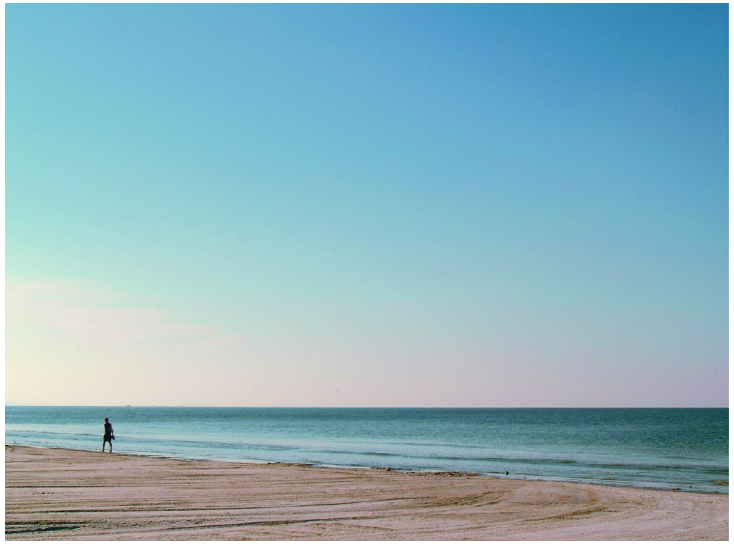
89% Safe destination

[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.

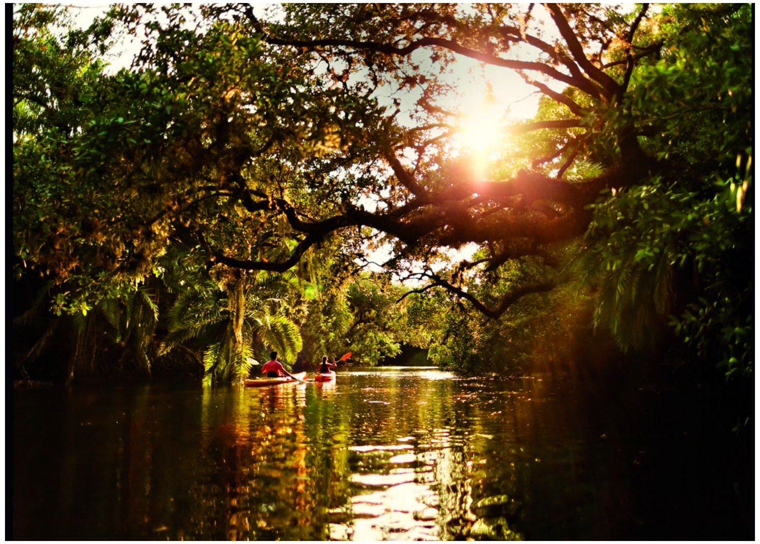
TOP REASONS FOR VISITING

- Visitors' top reasons for visiting the Fort Myers area include[1]:

57% Vacation



53% Beach



43% Relax & unwind

[1]Three responses permitted.

PROMOTIONS

- 38% of visitors **recalled promotions** in the past 6 months for the Fort Myers area
- Top sources of recall include[1]:

41%[2] Internet

36%[2] Social media

[1] Multiple responses permitted.
[2] Base = 38%.

BOOKING

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

46% Directly with hotel/condo

16% VRBO, HomeAway

13% Other online travel agency

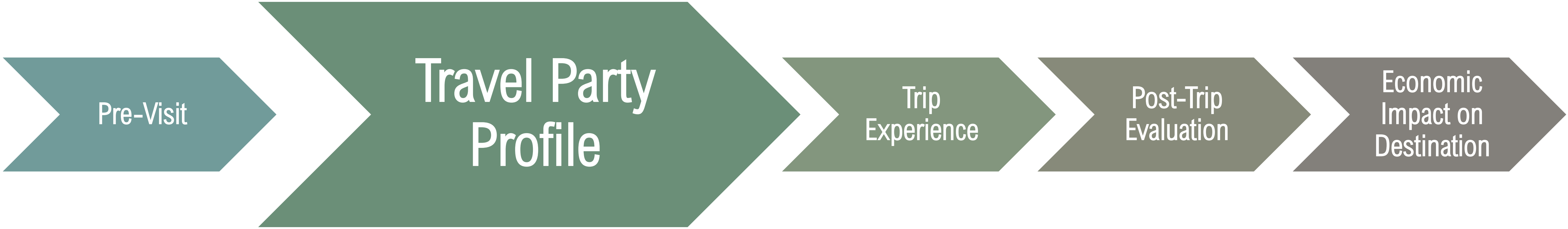
12% Airbnb

8% Vacation rental company

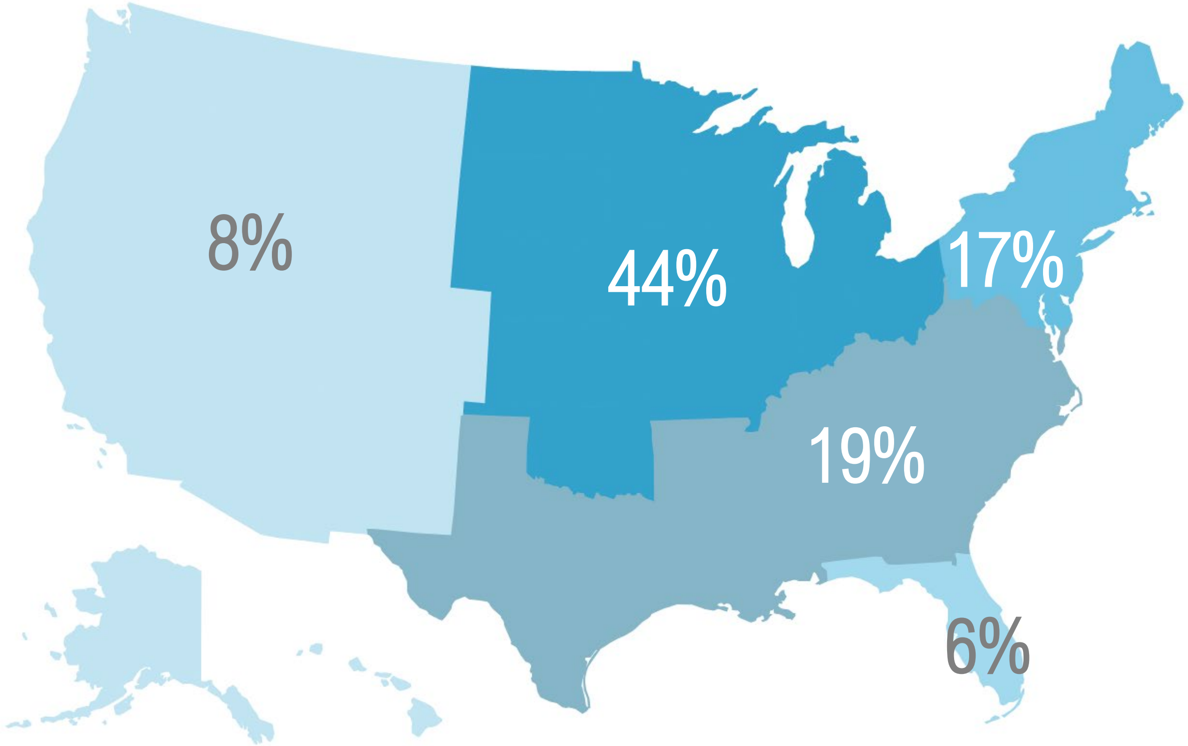
TRANSPORTATION

- 76% of visitors flew to the Fort Myers area
- 62% of all visitors traveled to the Fort Myers area via RSW

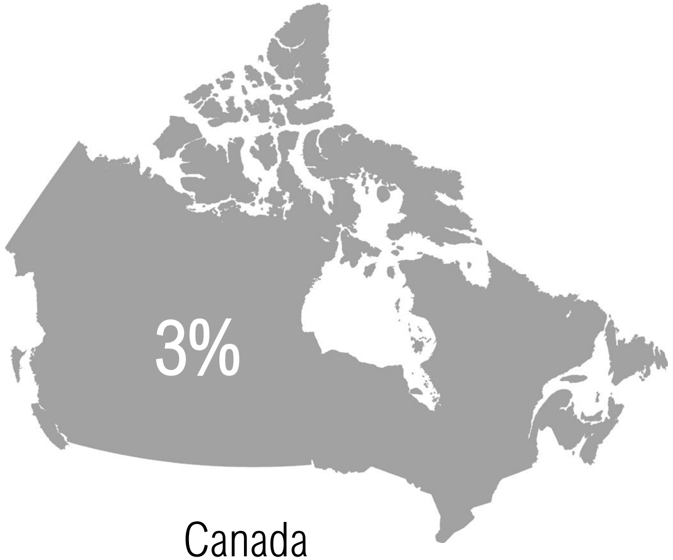
VISITOR JOURNEY: TRAVEL PARTY PROFILE



ORIGIN



US = 94%



Canada

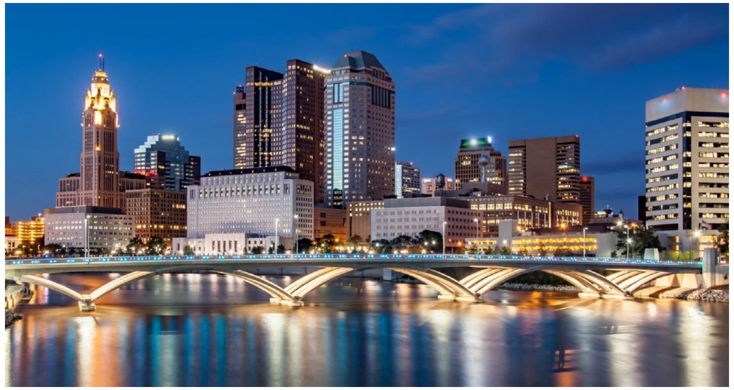
TOP ORIGIN MARKETS

6% Chicago

5% New York City

5% Minneapolis

4% Detroit



4% Columbus, OH

4% Atlanta

TRAVEL PARTY SIZE AND COMPOSITION

- Visitors traveled in a party composed of 3.5 people[1]
- 38% traveled with children under the age of 18
- 47% traveled as a family

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

DEMOGRAPHIC PROFILE

CY 2021 Visitors:

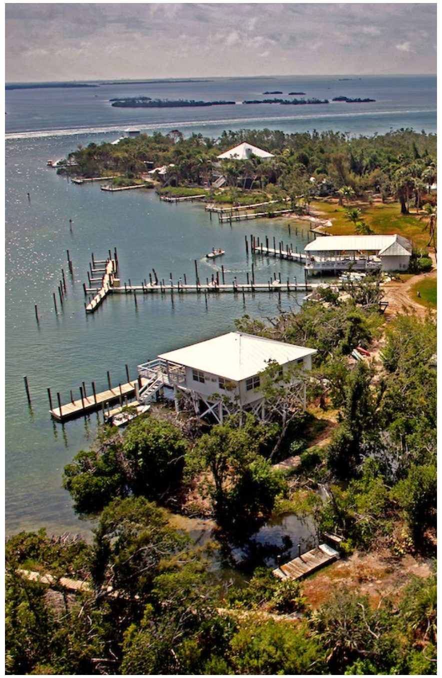
- Average age of 50 years old
- Median household income of $105,950
- Married (74%)
- College educated (67%)
- Caucasian/white (79%)
- Female (53%)

Visitor Journey: Trip Experience

ACCOMMODATIONS

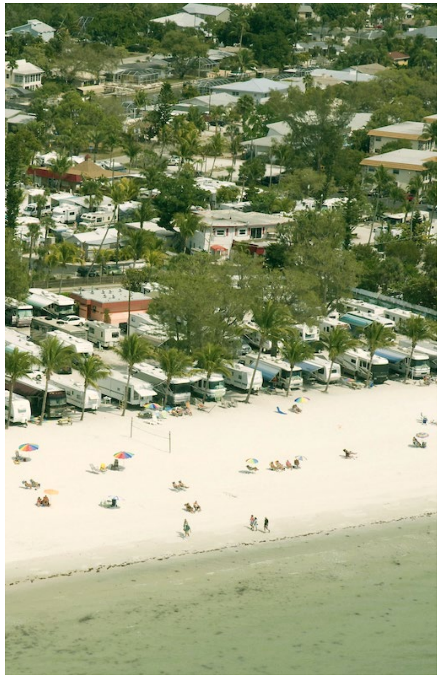
41% Condo/Vacation Rental

30% Hotel/Motel/Resort/B&B



24% Non-paid Accommodations

3% Day trippers



2% RV Park/Campground

LENGTH OF STAY & NUMBER OF TIMES IN DESTINATION

- Visitors[1] spent **6.9 nights** in the Fort Myers area
- **32%** were **first time** visitors
- **19%** have visited **more than 10 times**

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

VISITOR ACTIVITIES

- Top visitor activities include[1]:

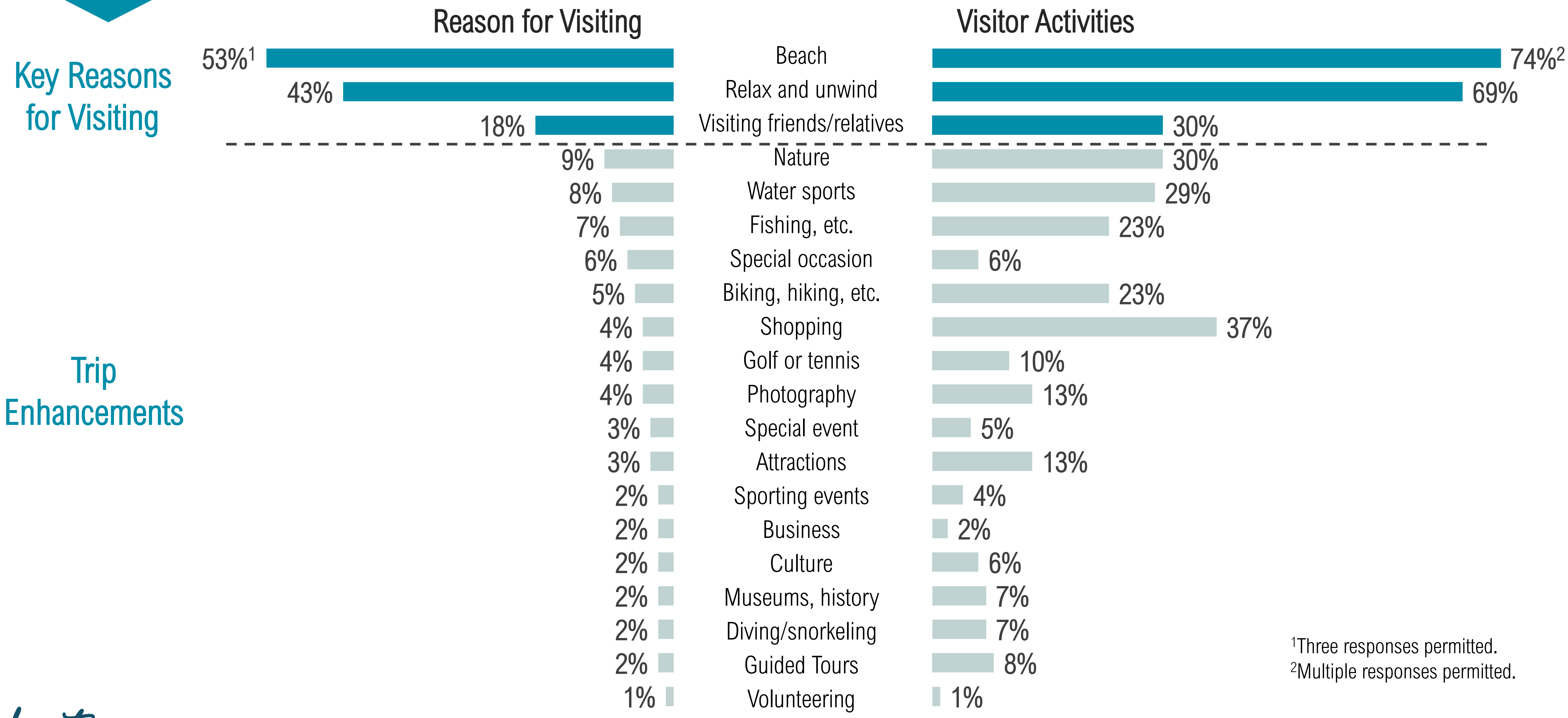
74% Beaches

69% Relax & unwind

55% Dining

[1]Multiple responses permitted.

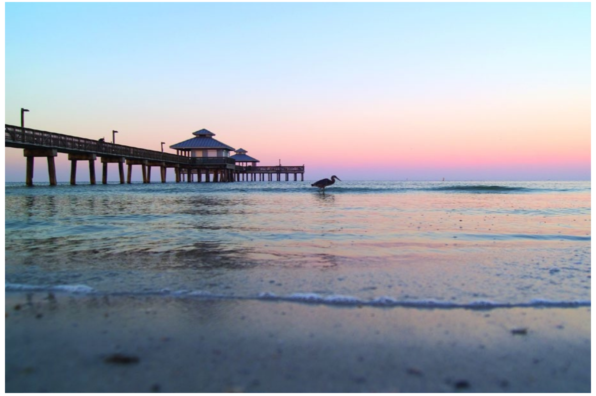
REASON FOR VISITING VS. VISITOR ACTIVITIES



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

TOP ATTRACTIONS VISITED[1]

75% Beaches



34% Fort Myers Beach Pier

31% Sanibel Lighthouse

[1]Multiple responses permitted.

TOP COMMUNITIES STAYED

29% Sanibel Island

26% Fort Myers Beach

13% Fort Myers

13% Cape Coral

VISITOR JOURNEY: POST-TRIP EVALUATION

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

SATISFACTION

- 96% of visitors are likely to recommend the Fort Myers area
- 89% of visitors are likely to return
- 59% of visitors are likely to return next year

SATISFACTION

- 97% of visitors were satisfied or very satisfied with their overall visit to the Fort Myers area (69% were very satisfied)
- 93% of visitors were satisfied or very satisfied with customer service on their visit (63% were very satisfied)
- 41% of visitors said paid accommodations exceeded their expectations (96% met or exceeded expectations)

TOP ATTRIBUTE RATINGS

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

97% Peaceful/relaxing

96% Warm weather

96% A safe destination

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

VISITOR CONCERNS

- 1 in 4 visitors was concerned about traffic in the Fort Myers area
- 1 in 5 were concerned about beach seaweed and high prices
- 25% of visitors had no concerns about the destination

AREA DESCRIPTIONS

Wonderful Place to Visit

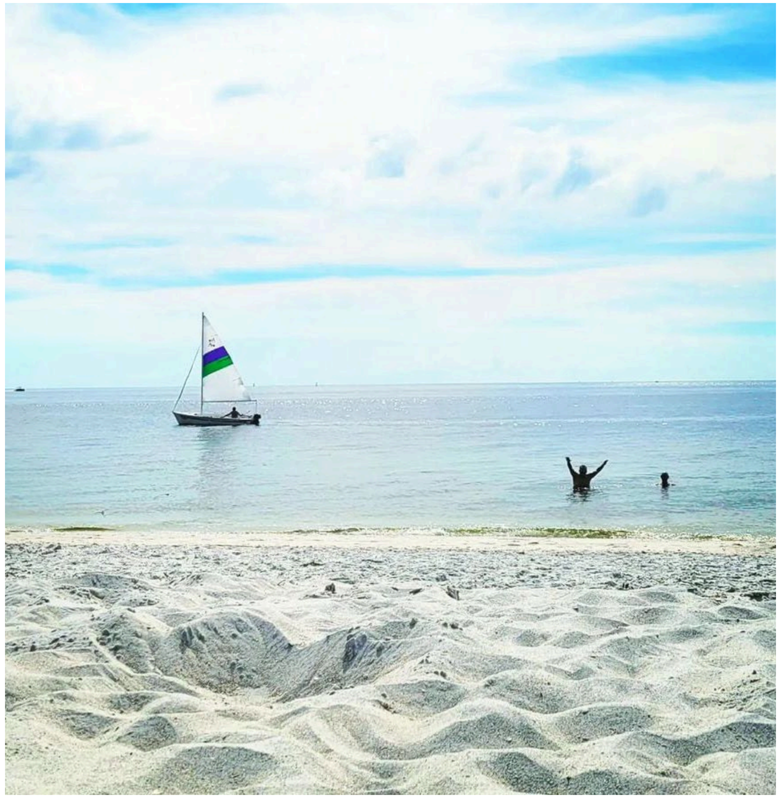
"Perfect vacation; my favorite getaway."

Beautiful Beaches

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

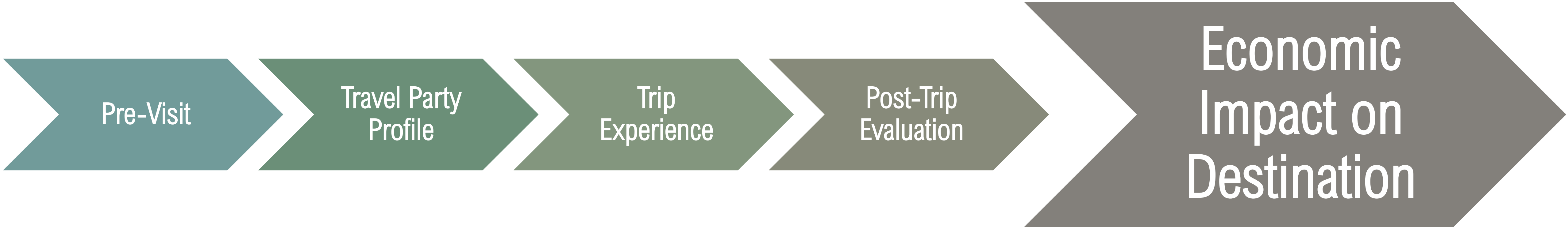
Warm Weather

"The warm weather is refreshing from the long winter."



Detailed Findings

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION



TOURISM SNAPSHOT: CALENDAR YEAR 2021[1]

Visitor & Lodging Statistics	2020	2021	% Change
Visitors	3,391,700	4,687,500	+38.2%
Room Nights	4,413,800	6,394,800	+44.9%
Direct Expenditures[2]	$2,631,887,000	$3,729,946,900	+41.7%
Total Economic Impact[3]	$4,274,184,500	$5,945,535,400	+39.1%
TDT	$37,400,615	$57,528,841	+53.8%

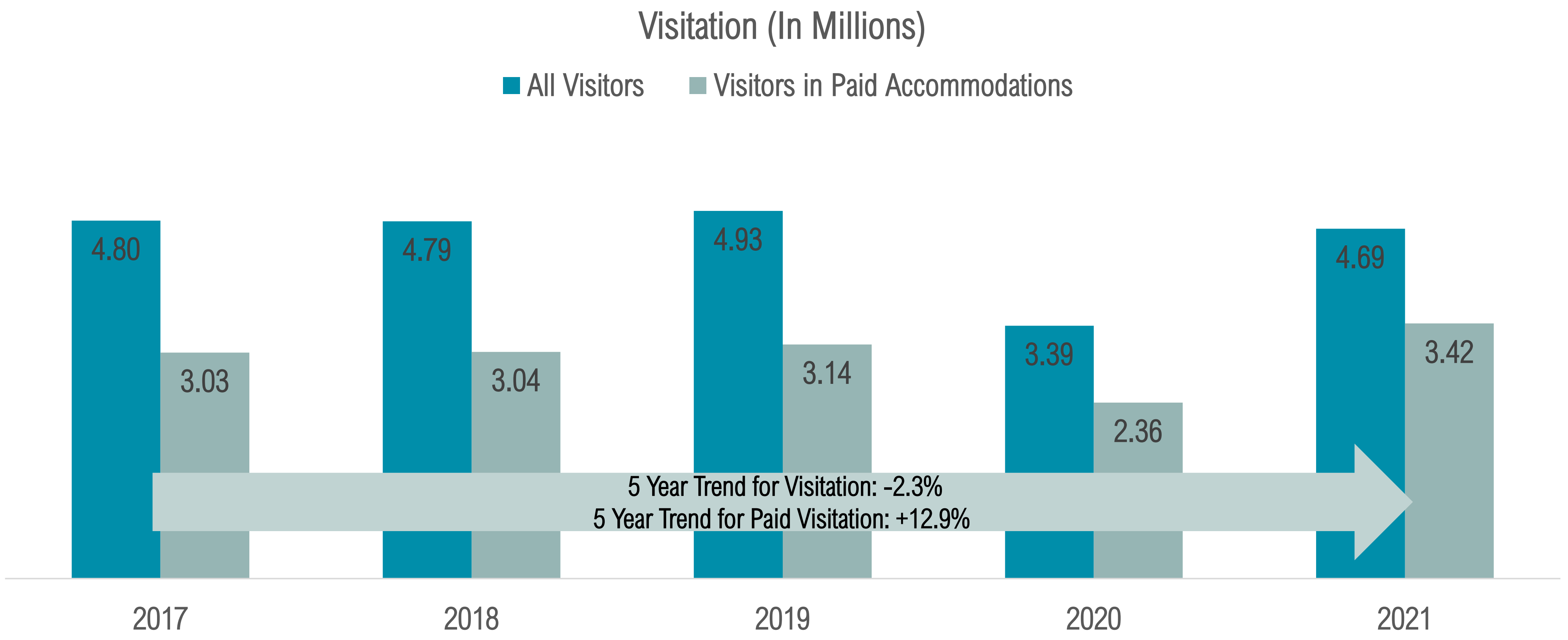
[1] Includes: accommodations, restaurants, entertainment, shopping, transportation, groceries, and "other" expenses.
[2] Economic impact includes indirect and induced effects of visitor spending. Indirect effects are increased business spending resulting from tourism dollars. Induced effects are increased household spending resulting from tourism dollars.
[3] As of January 2021, the IMPLAN multiplier used to estimate economic impact is 1.594.

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM

	2020	2021	% Change
Direct Jobs	35,060	50,133	+43.0%
Total Jobs[1]	49,006	69,174	+41.2%
Direct Wages	$790,077,400	$1,122,994,700	+42.1%
Total Wages[1]	$1,324,423,200	$1,844,217,000	+39.2%
Visitors to support one additional job	97	68	
Household Savings on State & Local Taxes	$1,537	$2,139	+39.2%
Marketing ROI	$264	$301	+14.0%

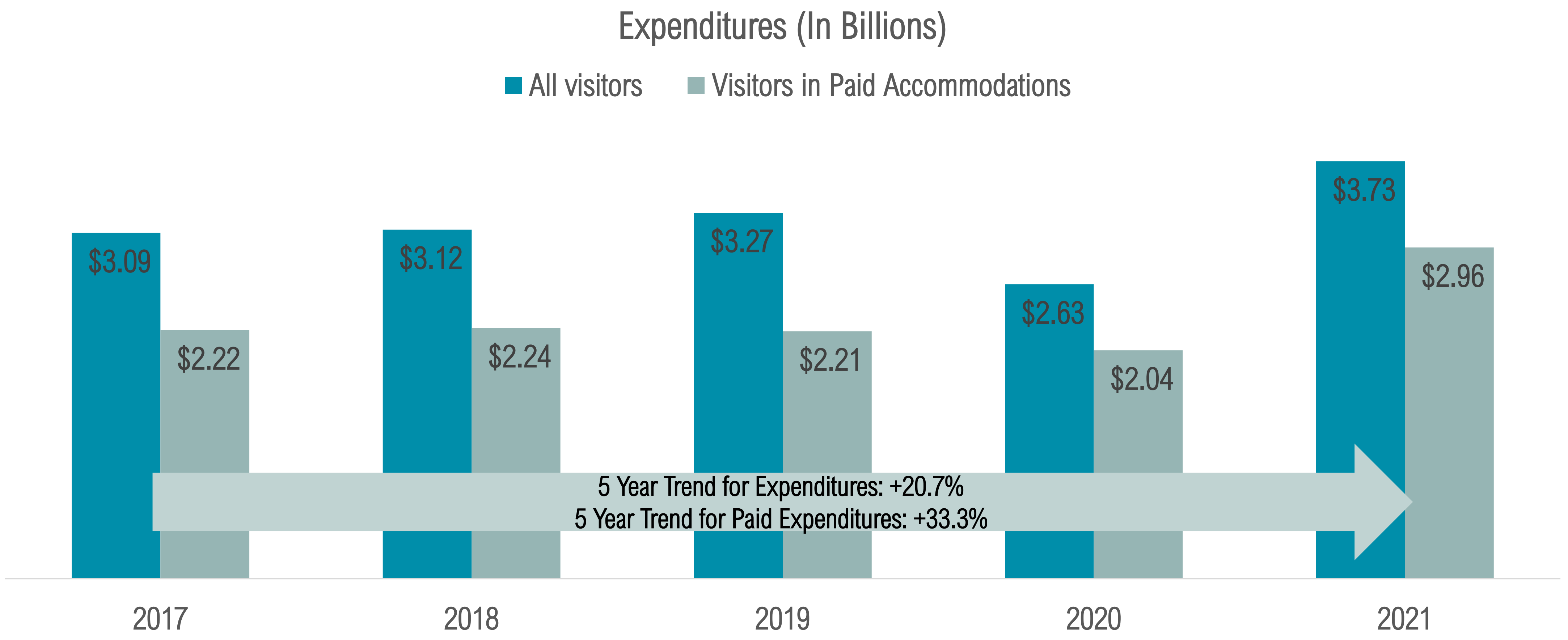
[1]"Total wages" and "total taxes" are greater than "direct wages" and "direct taxes" because visitors direct spending is recirculated throughout the Lee County economy as employees and employers buy products and services with visitors' dollars.

5 YEAR TREND: VISITATION



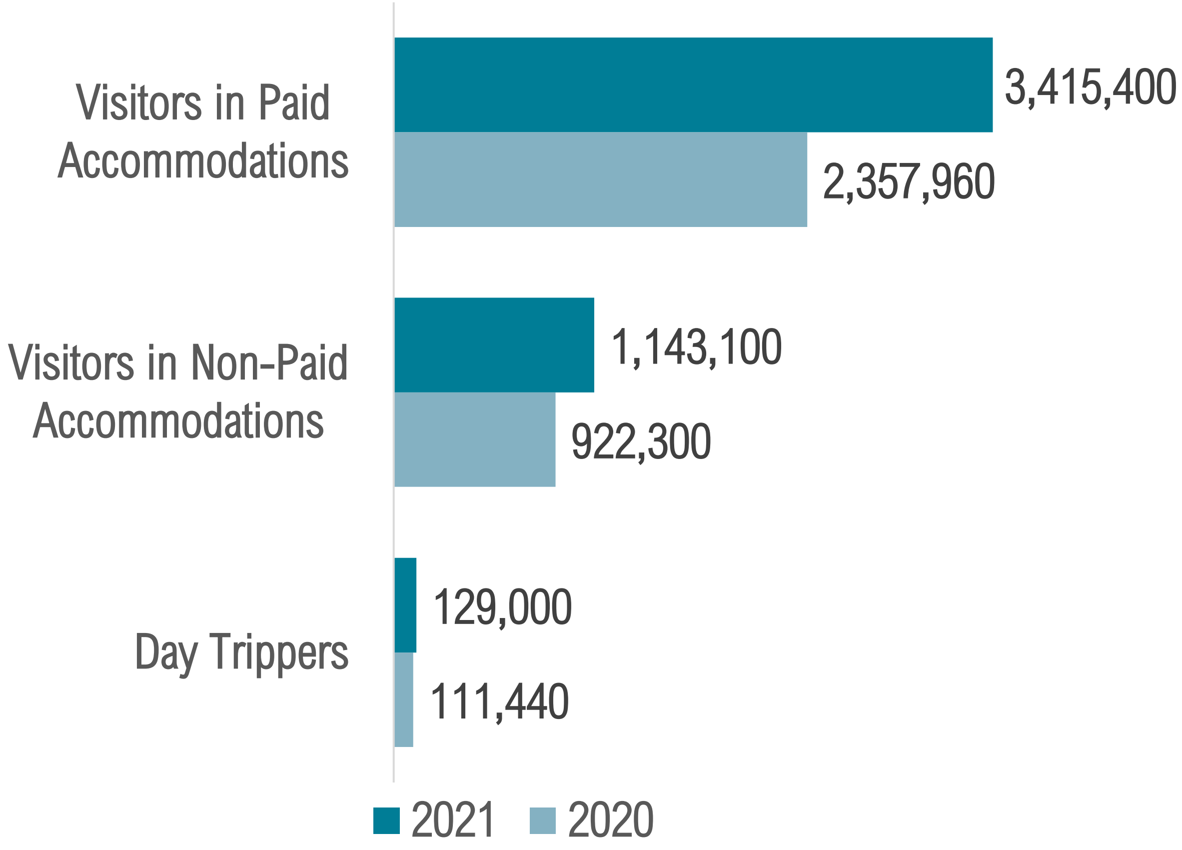
5 YEAR TREND: VISITOR SPENDING

- Spending per person is up 24% from 5 years ago



NUMBER OF VISITORS

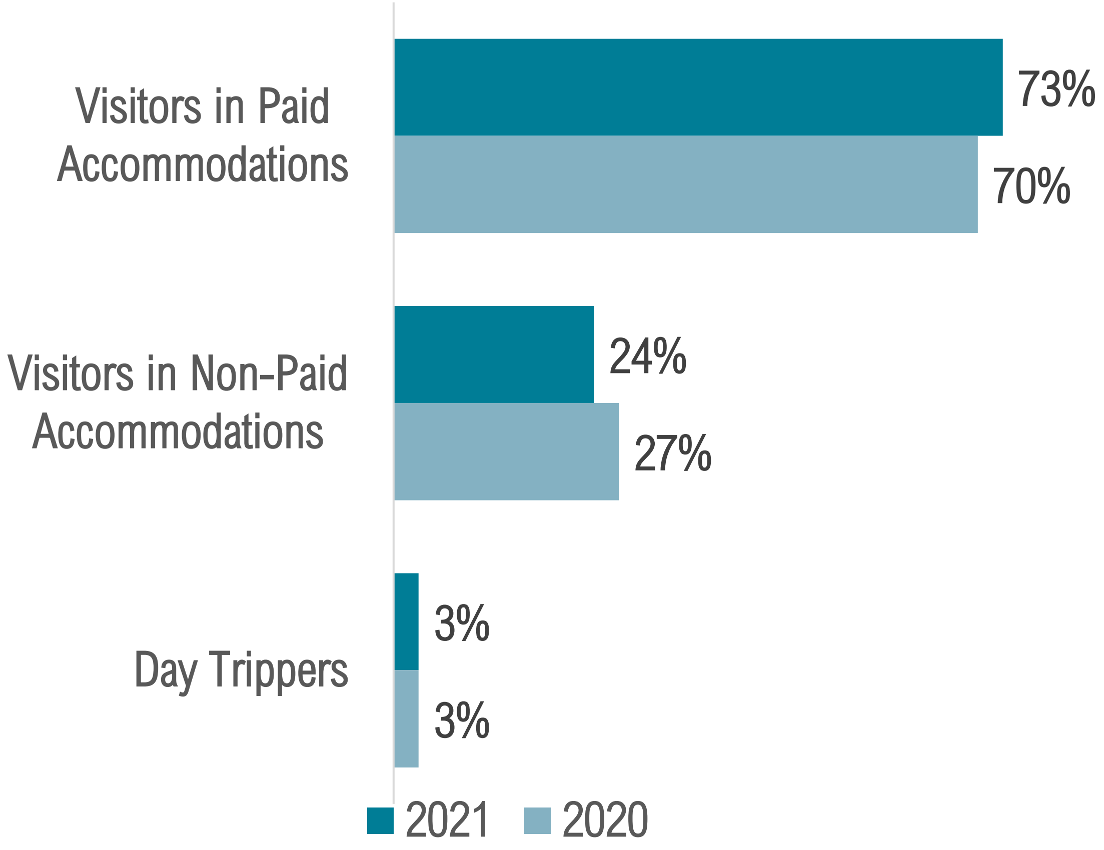
There were **4,687,500[1] visitors** to the Fort Myers area in 2021 (+38.2% from 2020).



[1]Sources: Visitor Tracking Study & Occupancy Survey

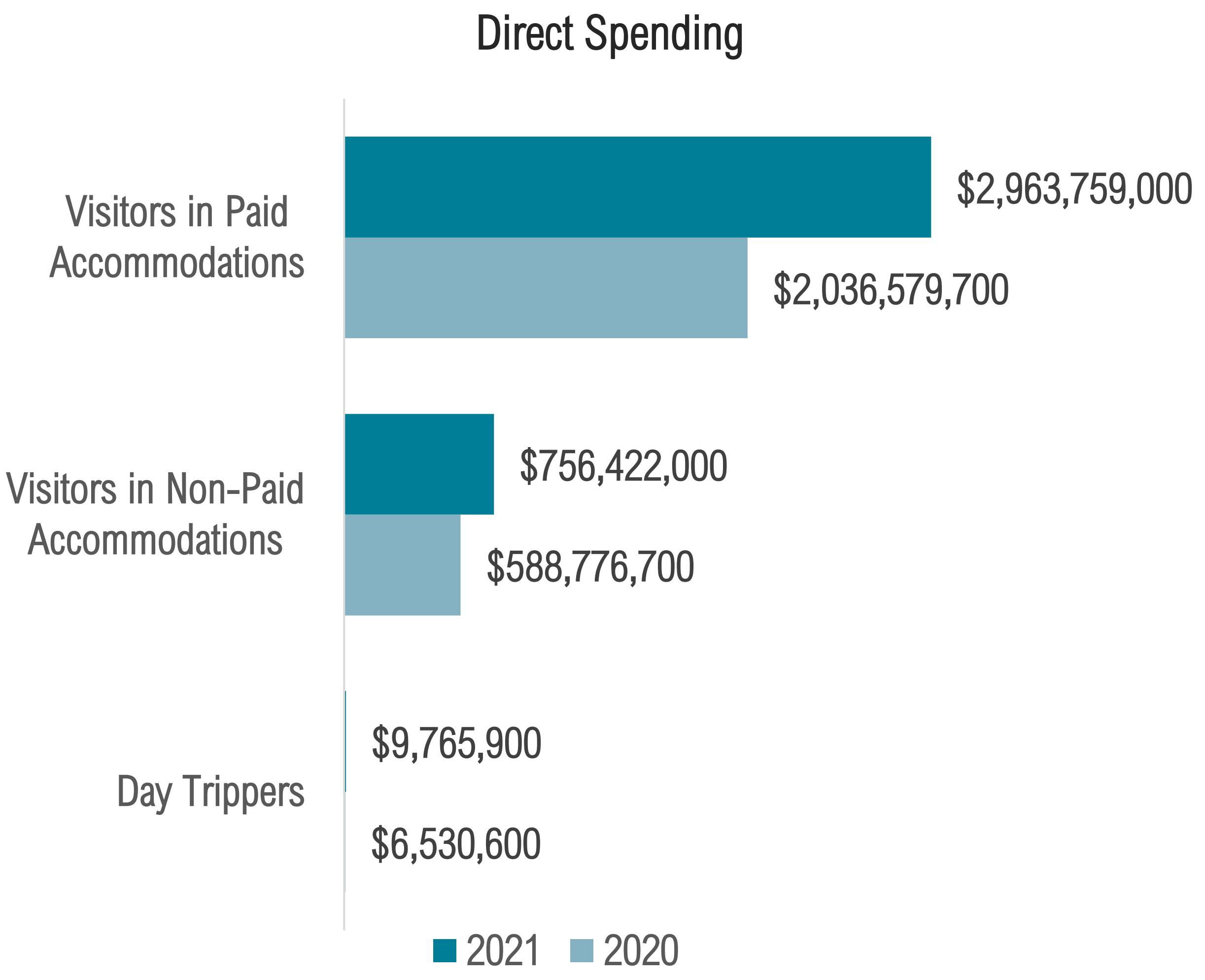
VISITOR TYPE

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



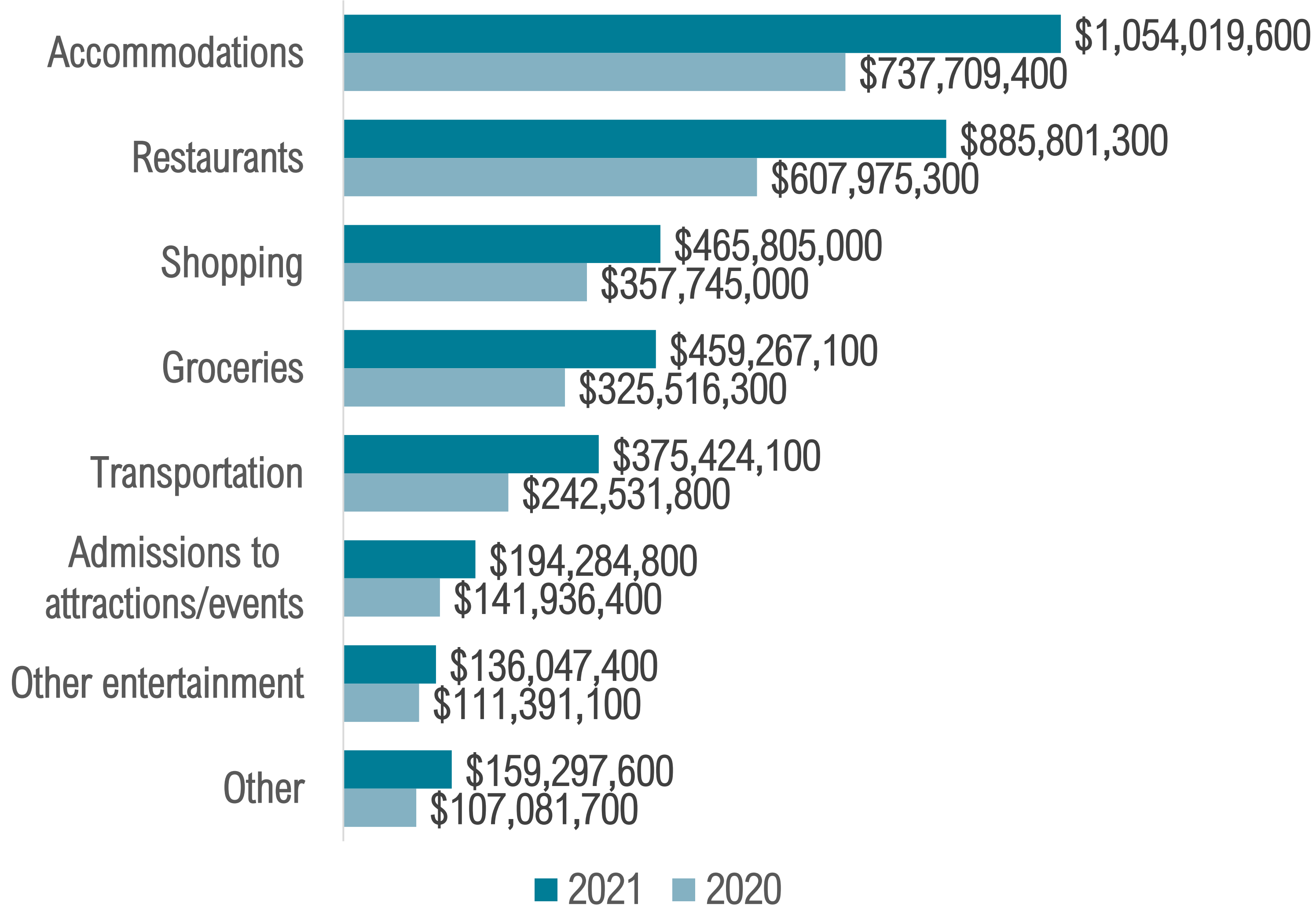
VISITOR EXPENDITURES BY VISITOR TYPE

2021 visitors spent **$3,729,946,900** in the Fort Myers area, resulting in a total economic impact of **$5,945,535,400**, up 39.1% from 2020.



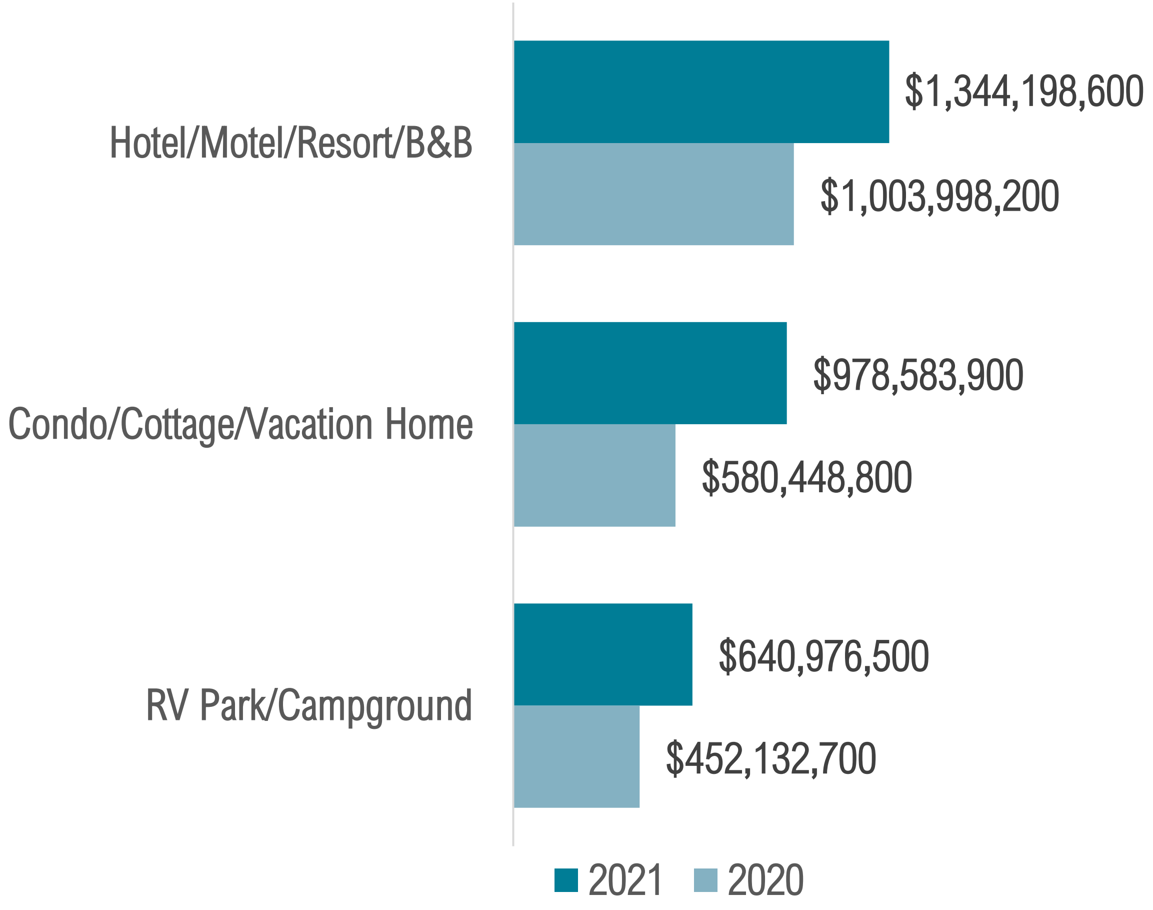
VISITOR EXPENDITURES BY SPENDING CATEGORY

Visitor spending on accommodations accounted for 28% of total visitor spending in 2021.



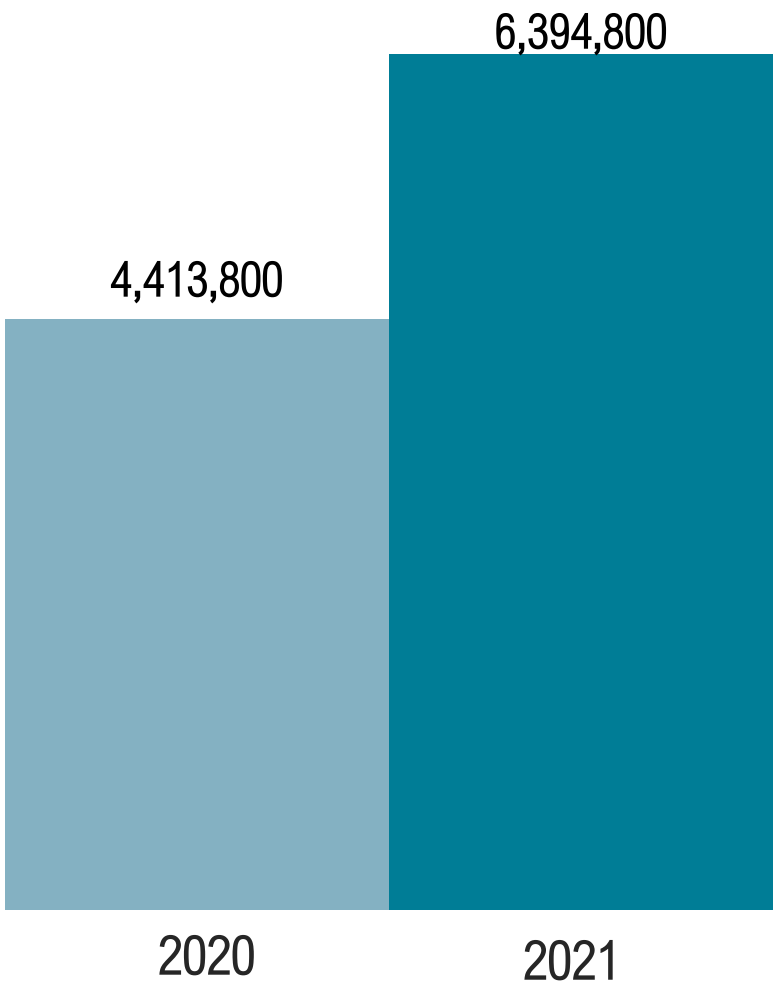
VISITOR EXPENDITURES BY LODGING TYPE

2021 visitors staying in **paid accommodations** spent **$2,963,759,000** in the Fort Myers area.



ROOM NIGHTS GENERATED

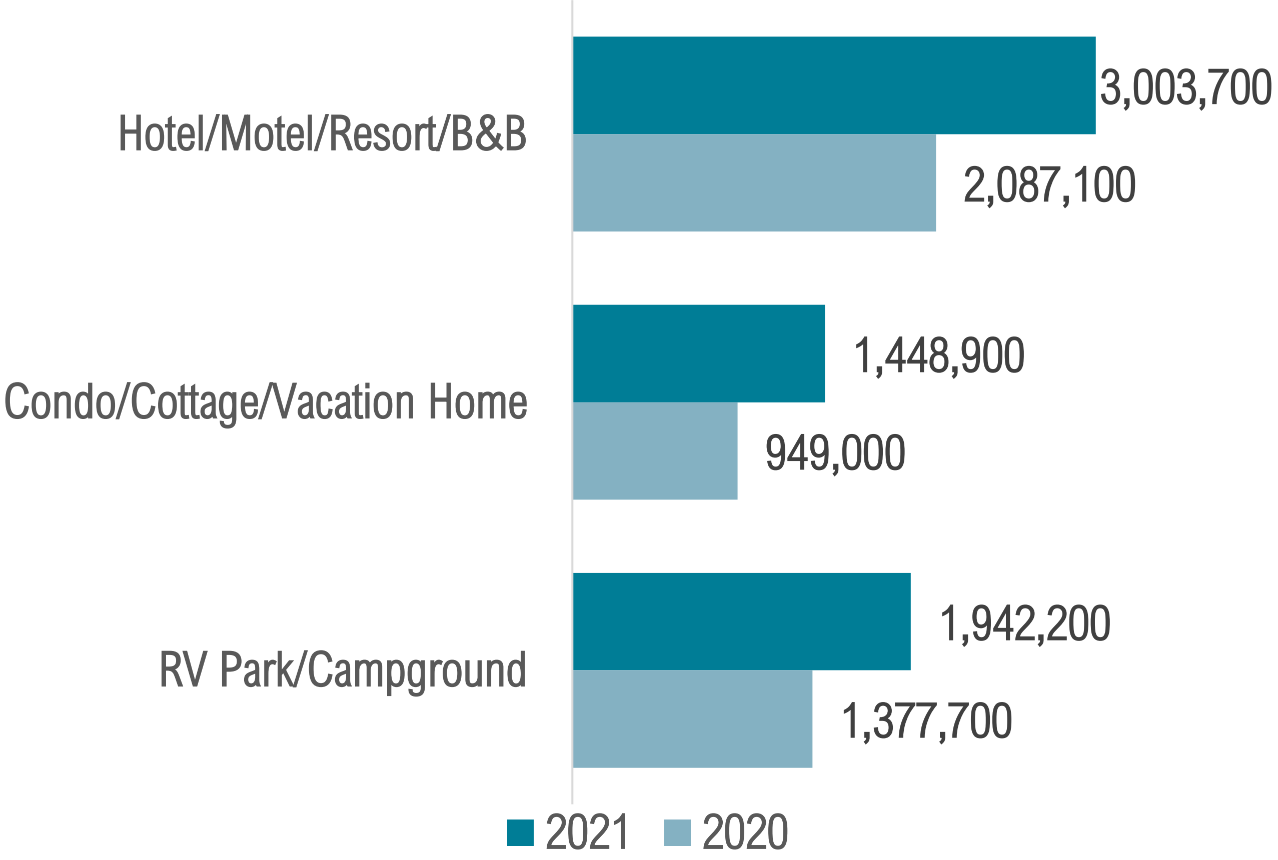
2021 visitors spent **6,394,800[1] nights** in the Fort Myers area. (+44.9% from 2020).



[1]Source: Occupancy Survey

ROOM NIGHTS GENERATED

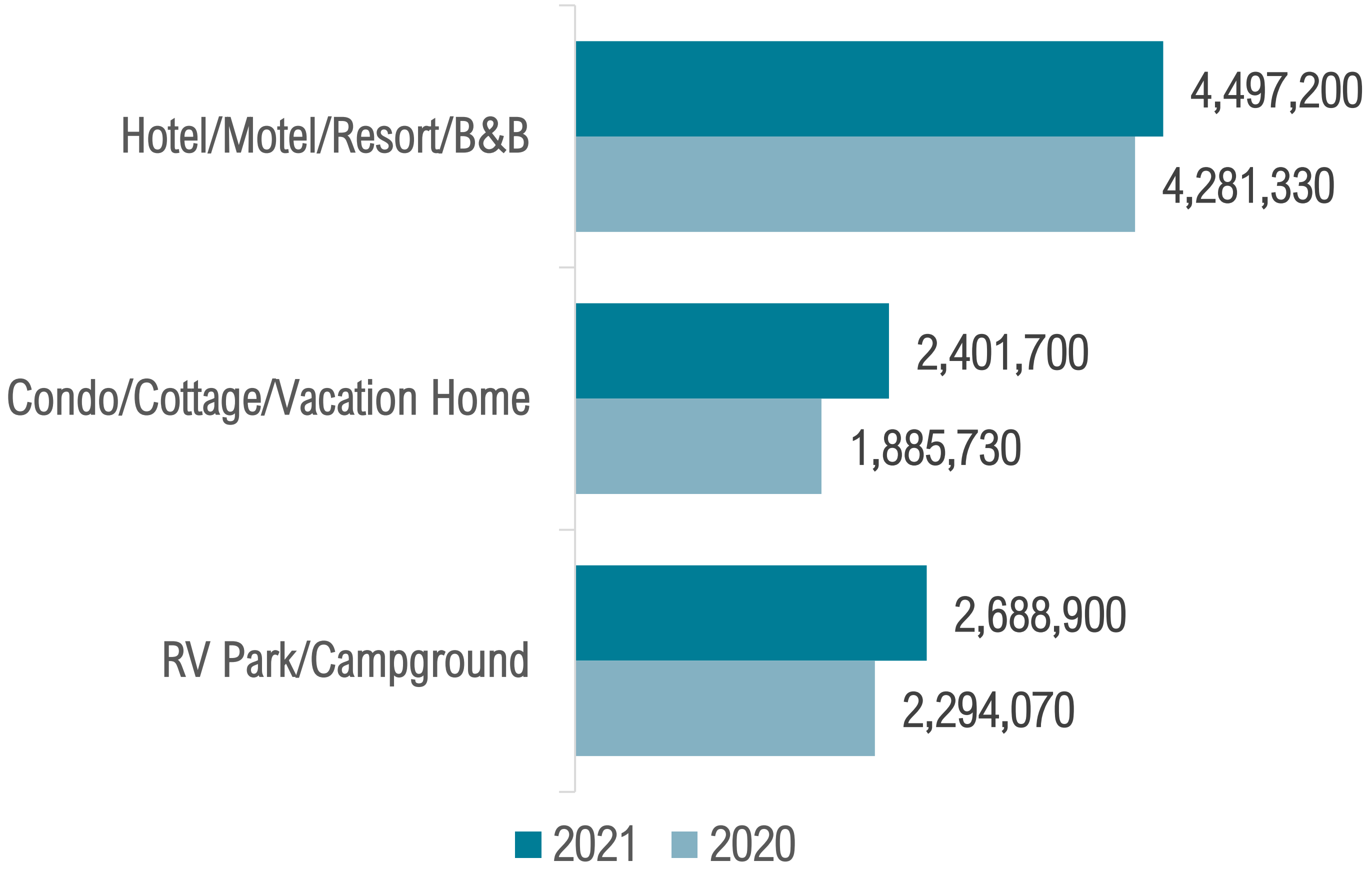
Motels, hotels, etc. accounted for nearly **half** of nights in the Fort Myers area, while **RV Parks/Campgrounds** accounted for **3 in 10** nights visitors spent in the area.



[1]Source: Occupancy Survey

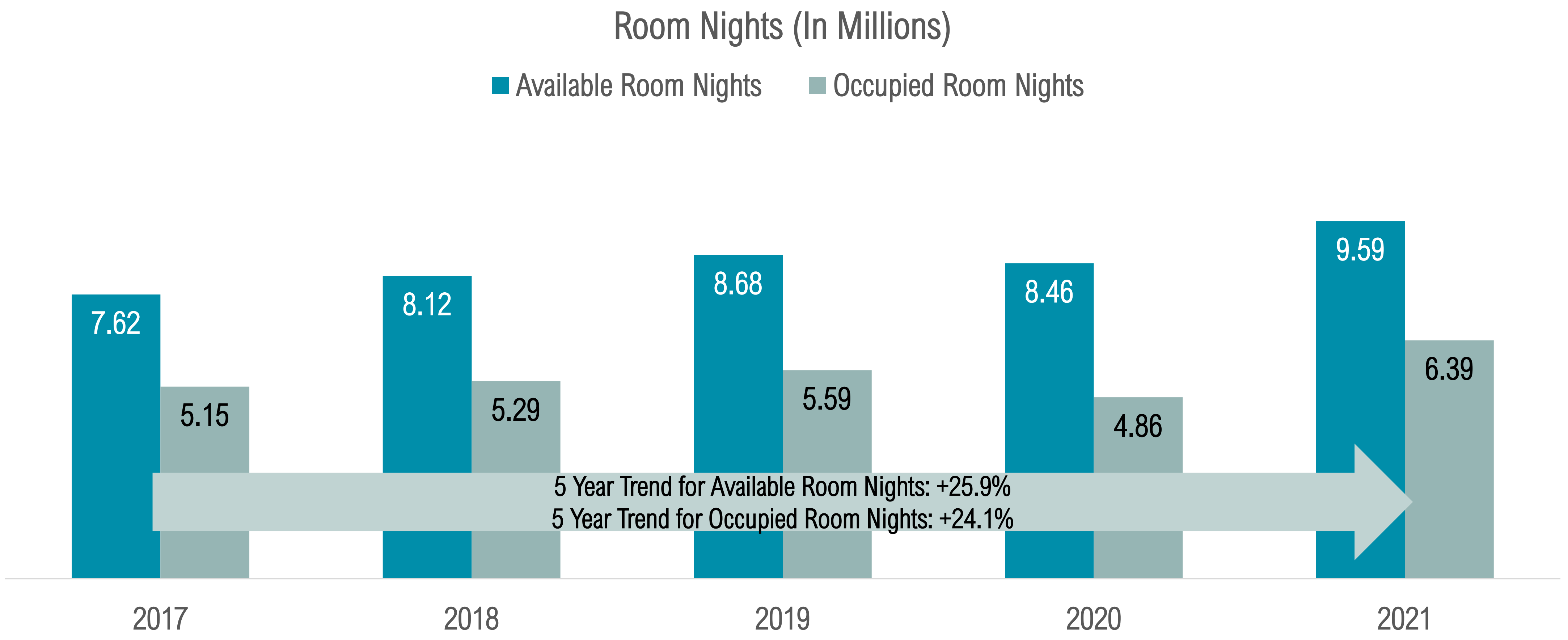
AVAILABLE ROOM NIGHTS

There were **9,587,800[1] available room nights** in 2021 vs. 8,461,130 in 2020 (+13.3%).

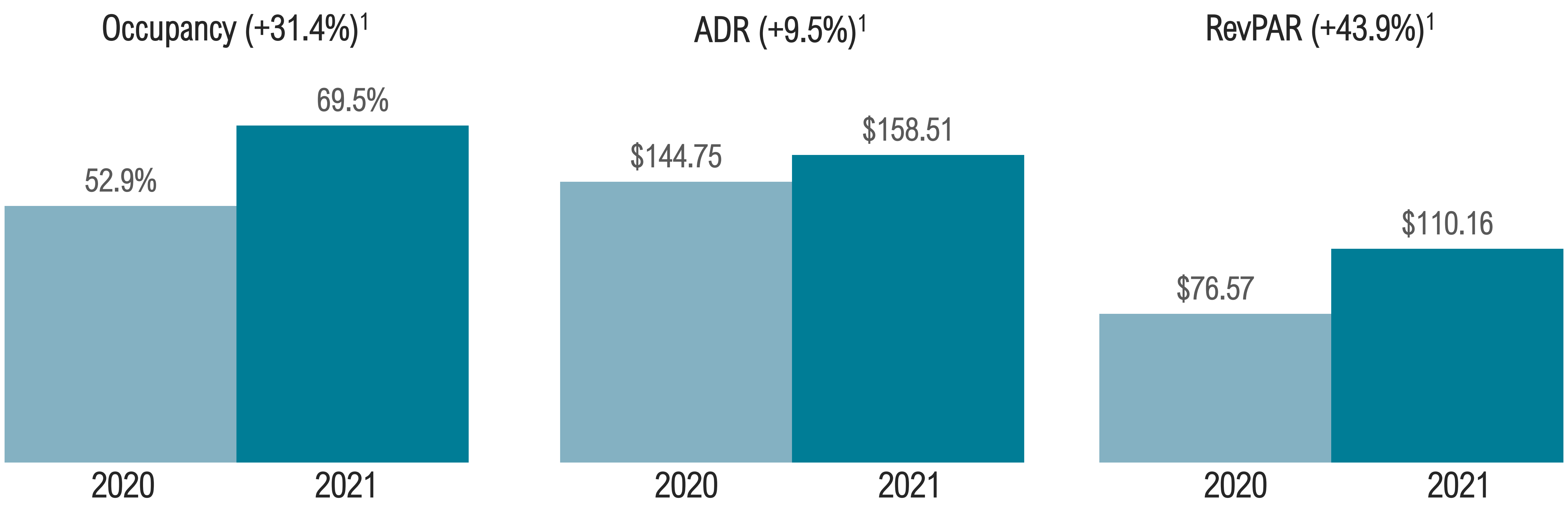


[1]Source: Occupancy Survey

5 YEAR TREND: AVAILABLE & OCCUPIED ROOM NIGHTS



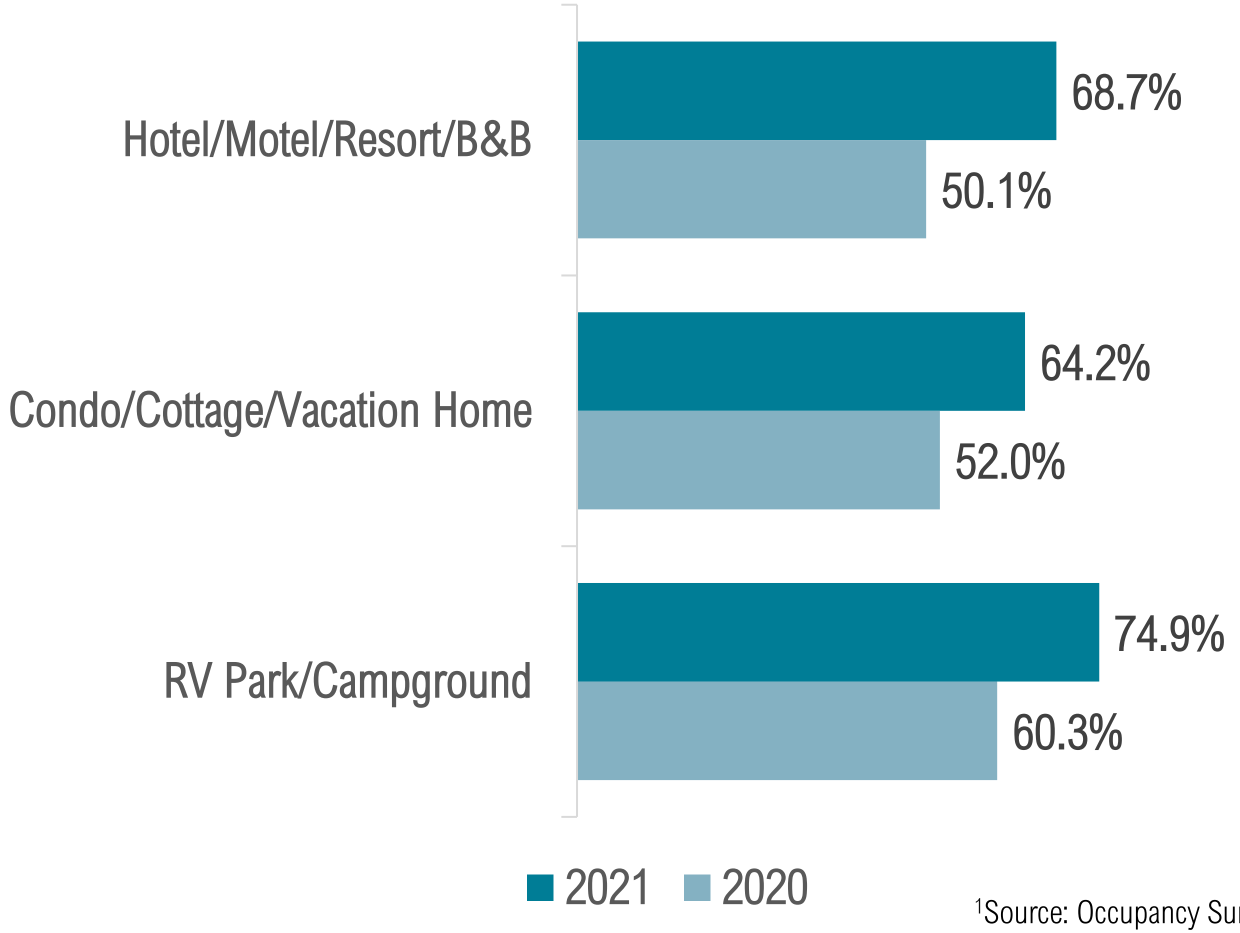
OCCUPANCY, ADR AND REVPAR



[1]Source: Occupancy Survey

OCCUPANCY

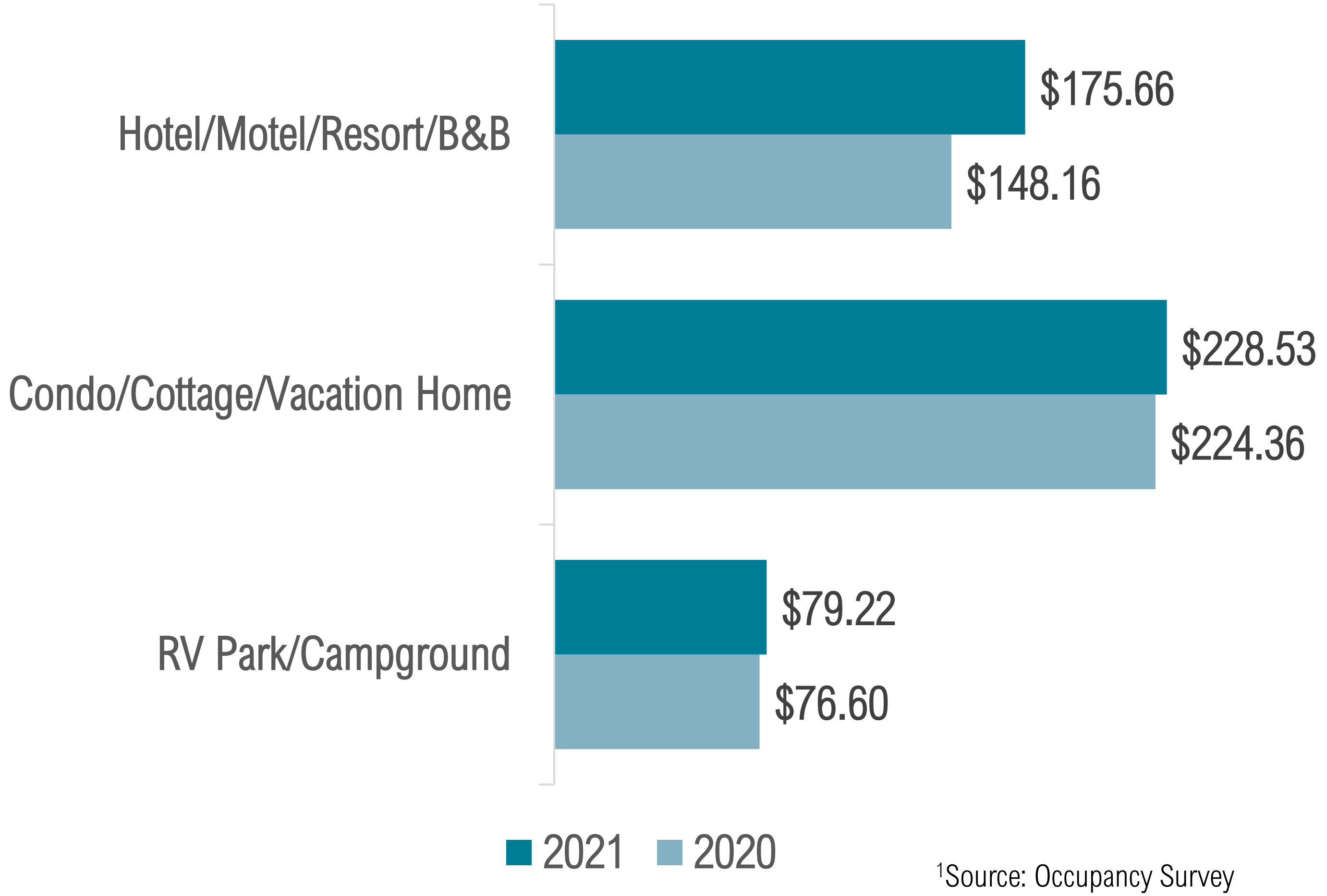
Average **occupancy** in 2021 was **69.5%**[1] (52.9% in 2020).



[1]Source: Occupancy Survey

ADR

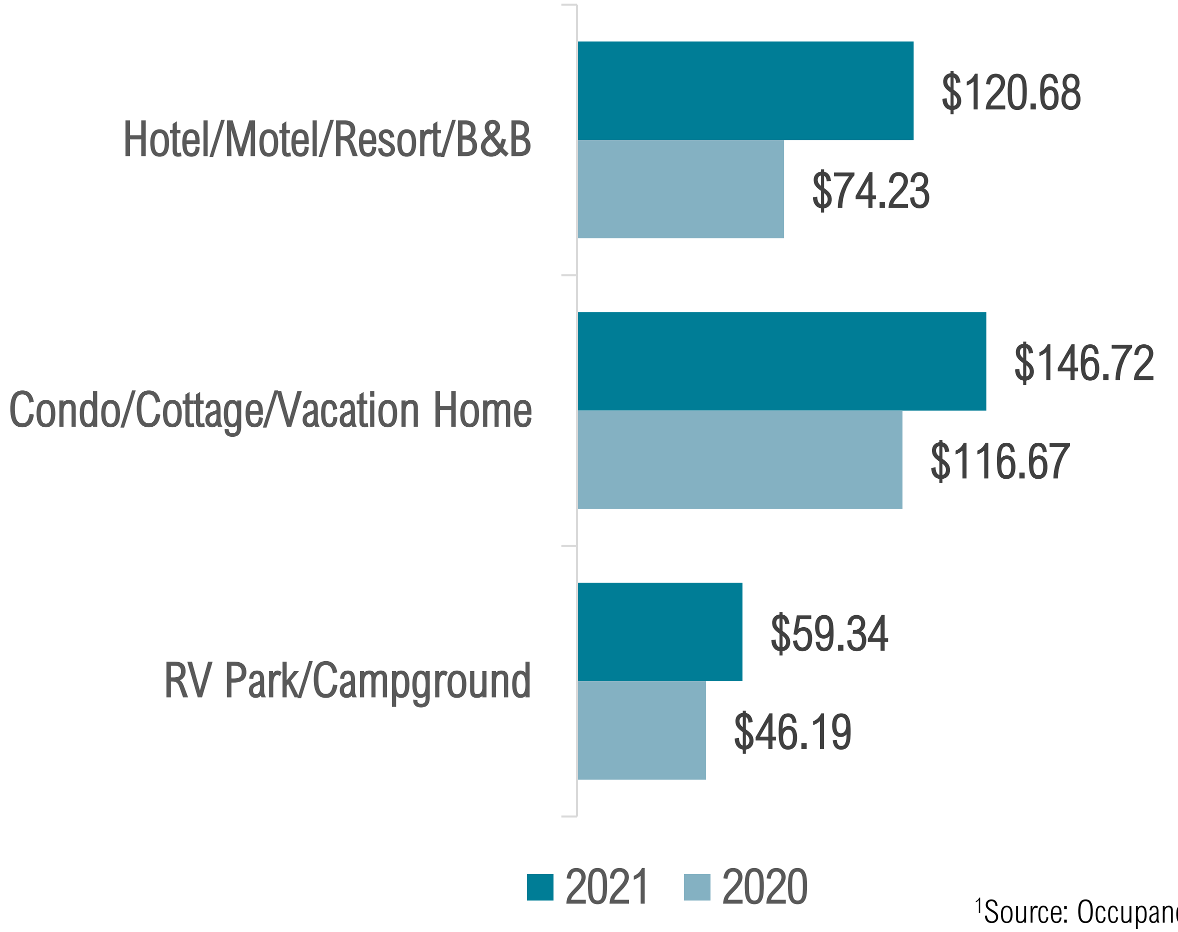
ADR in 2021 was **$158.51**[1] ($144.75 in 2020).



[1]Source: Occupancy Survey

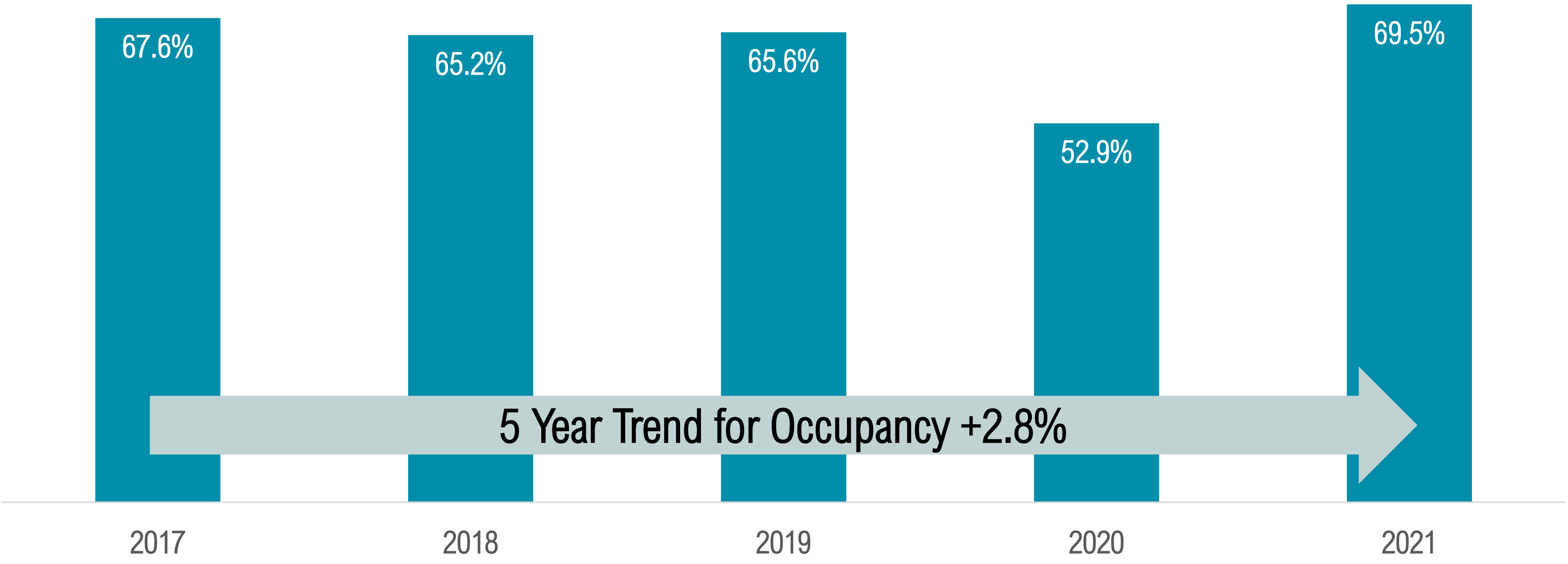
REVPAR

Average **RevPAR** in 2021 was **$110.16**[1] ($76.57 in 2020).

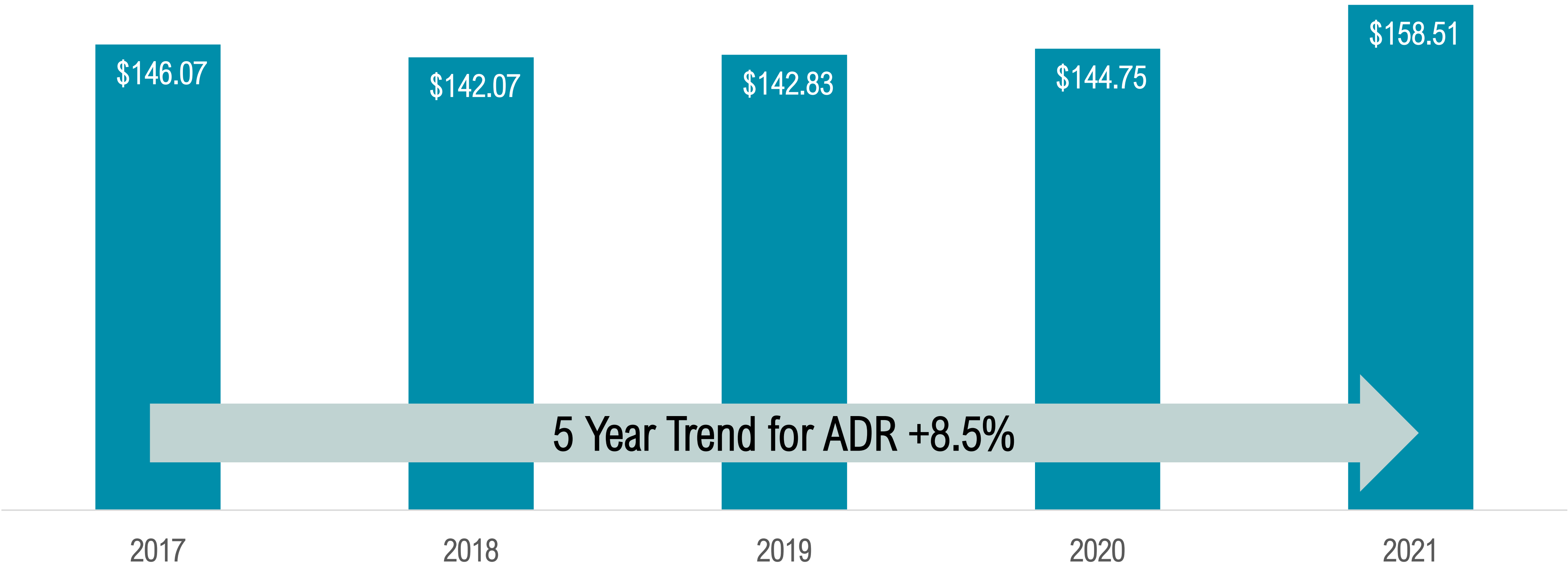


[1]Source: Occupancy Survey

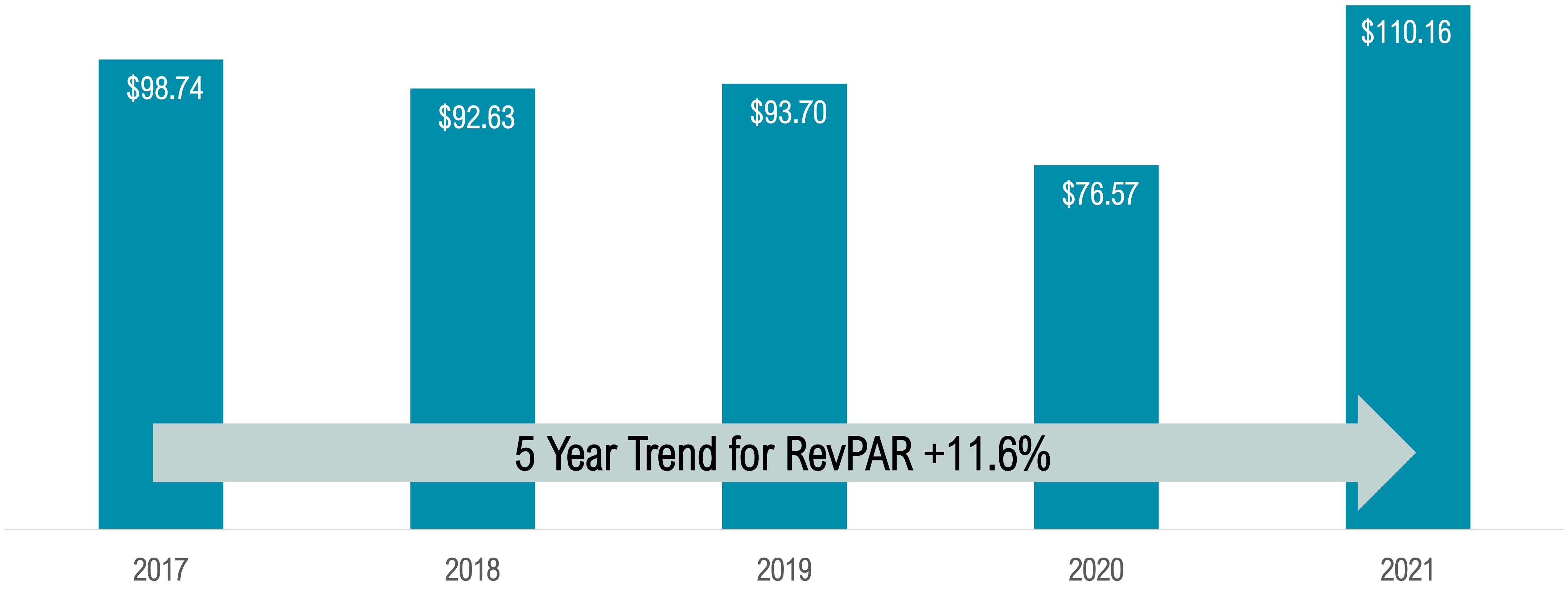
5 YEAR TREND: OCCUPANCY



5 YEAR TREND: ADR

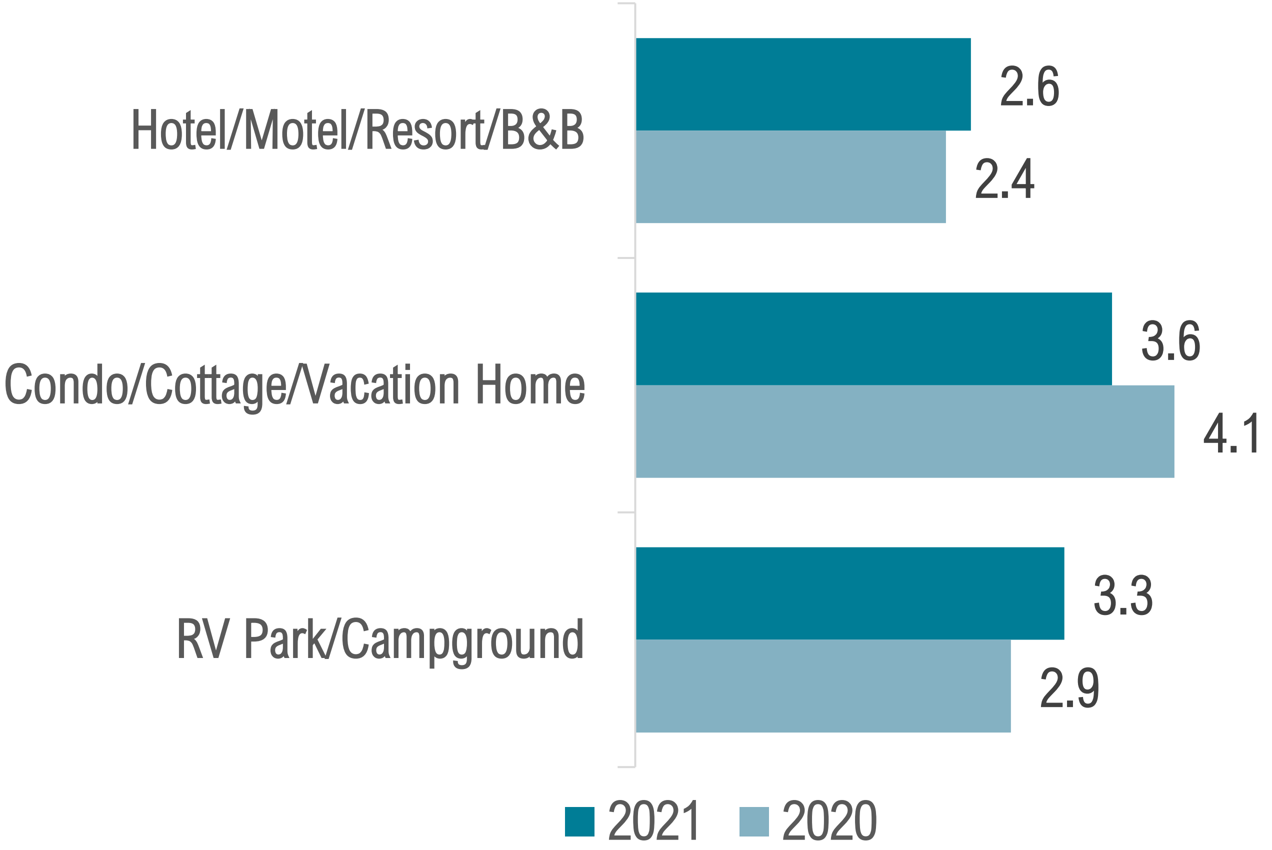


5 YEAR TREND: REVPAR



TRAVEL PARTY SIZE

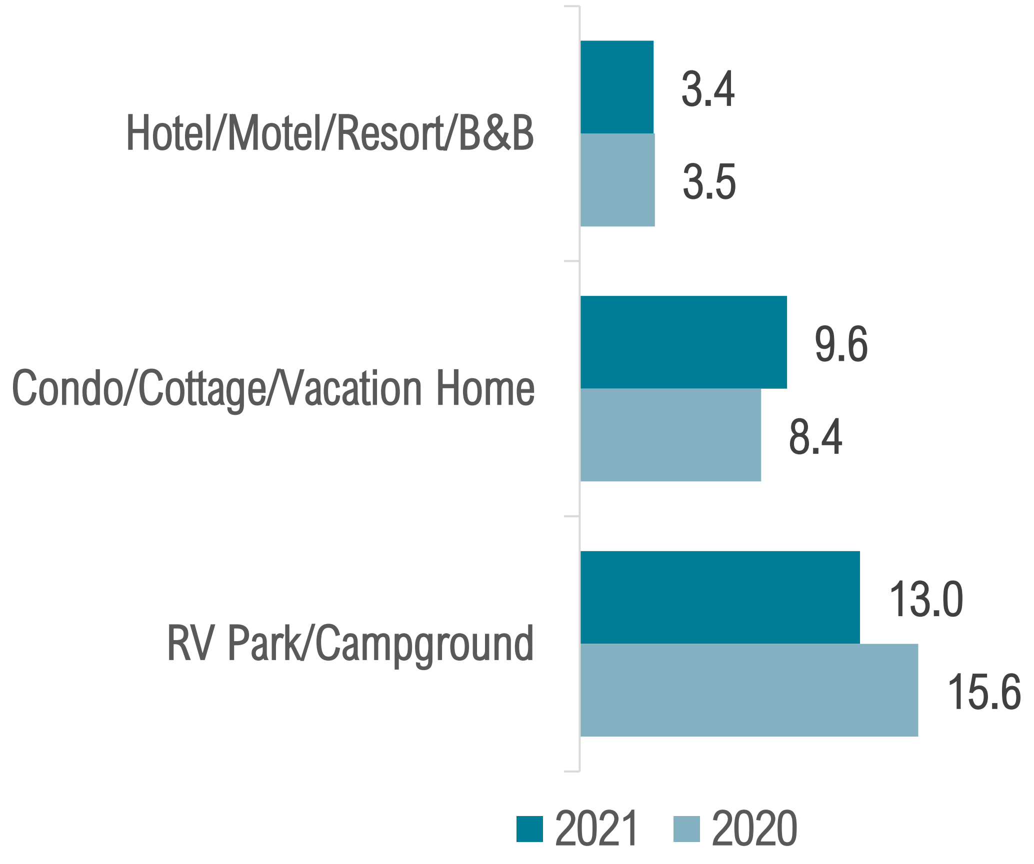
For visitors in **paid accommodations**, average **travel party size** in 2021 was **3.0 people**[1] (2.8 people in 2020).



[1]Source: Occupancy Survey

LENGTH OF STAY

For visitors in **paid accommodations**, average length of stay in 2021 was 5.7 nights[1] (5.5 nights in 2020).



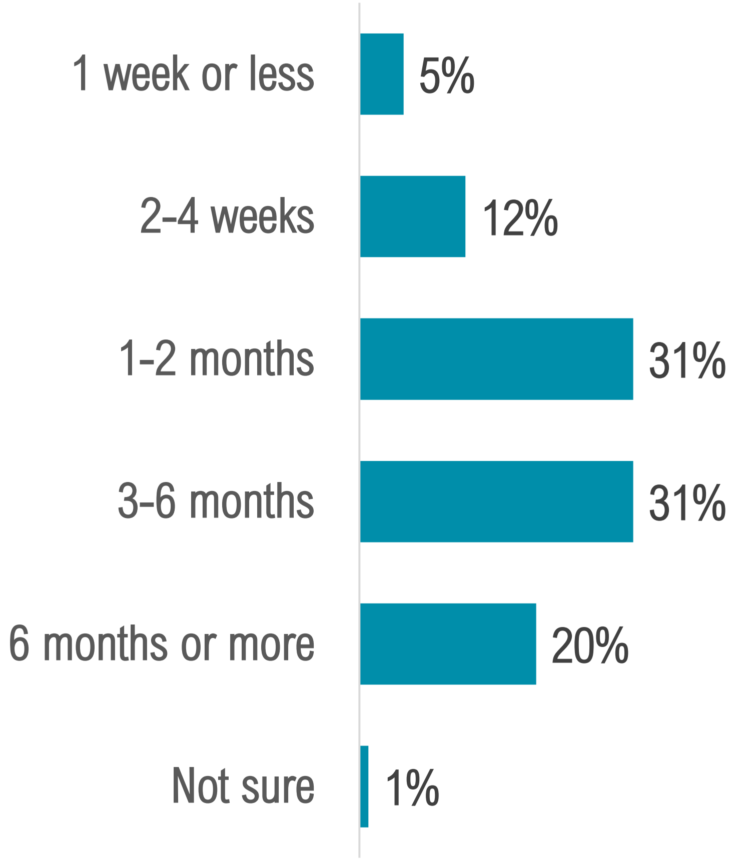
[1]Source: Occupancy Survey

VISITOR JOURNEY: PRE-VISIT

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

TRIP PLANNING CYCLE

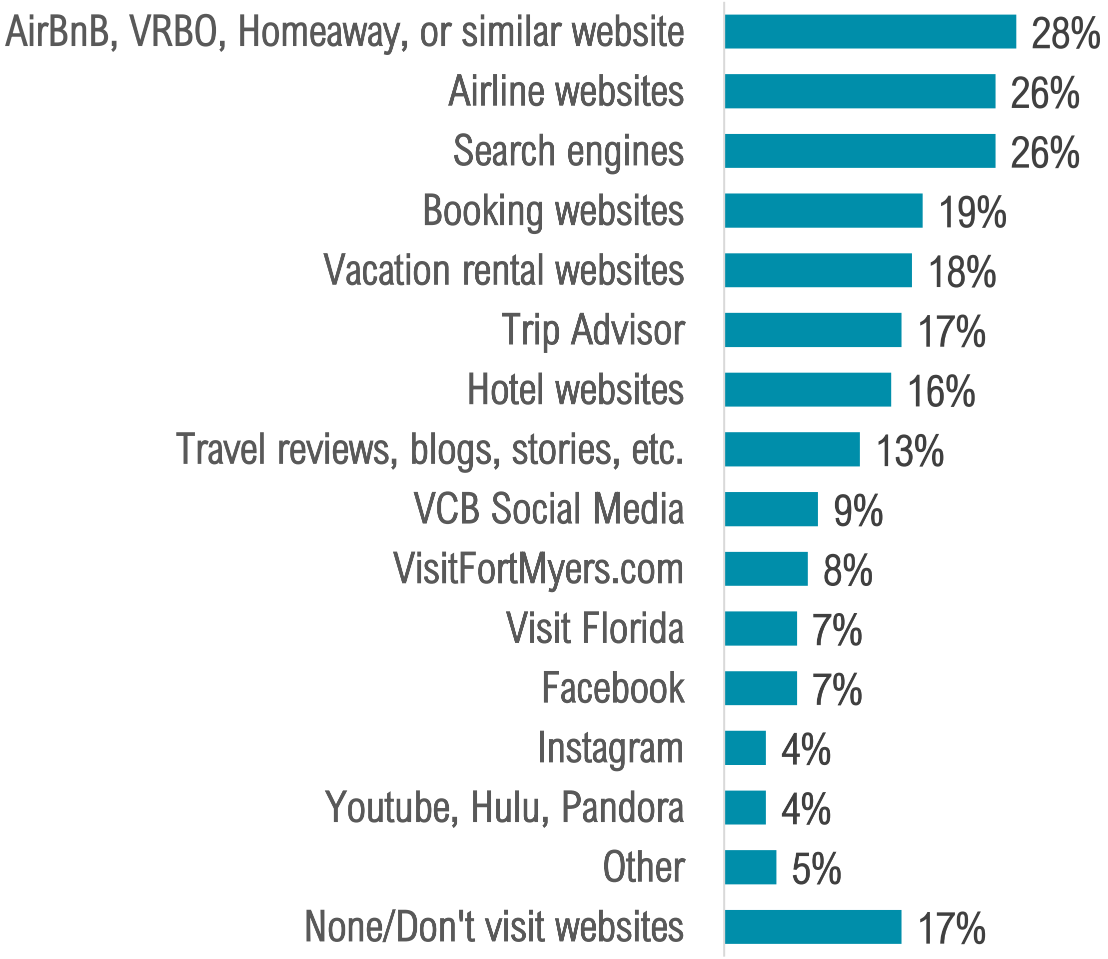
1 in 2 visitors planned their trip at least 3 months in advance, while only 17% planned their trip less than a month in advance.



TRIP PLANNING: WEBSITES USED[1]

83% of visitors used **websites** to plan their trips to the Fort Myers area.

Nearly **3 in 10** visitors used websites like **Airbnb and VRBO** to plan their trips in 2021.



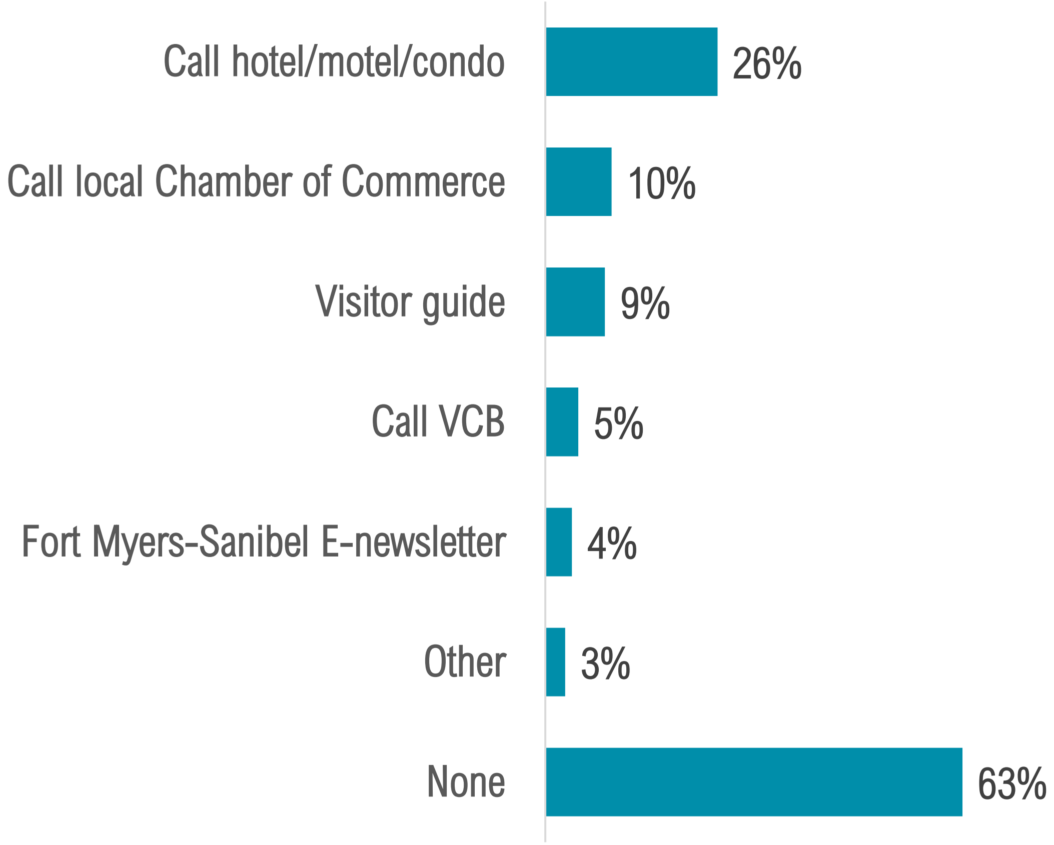
[1]Multiple responses permitted.

TRIP PLANNING: INFORMATION REQUESTS[1]

Nearly **2 in 5** visitors made **information requests** to plan their trips to the Fort Myers area.

Visitors who sought information prior to their trips were more likely to rely on a **hotel/motel/condo**.

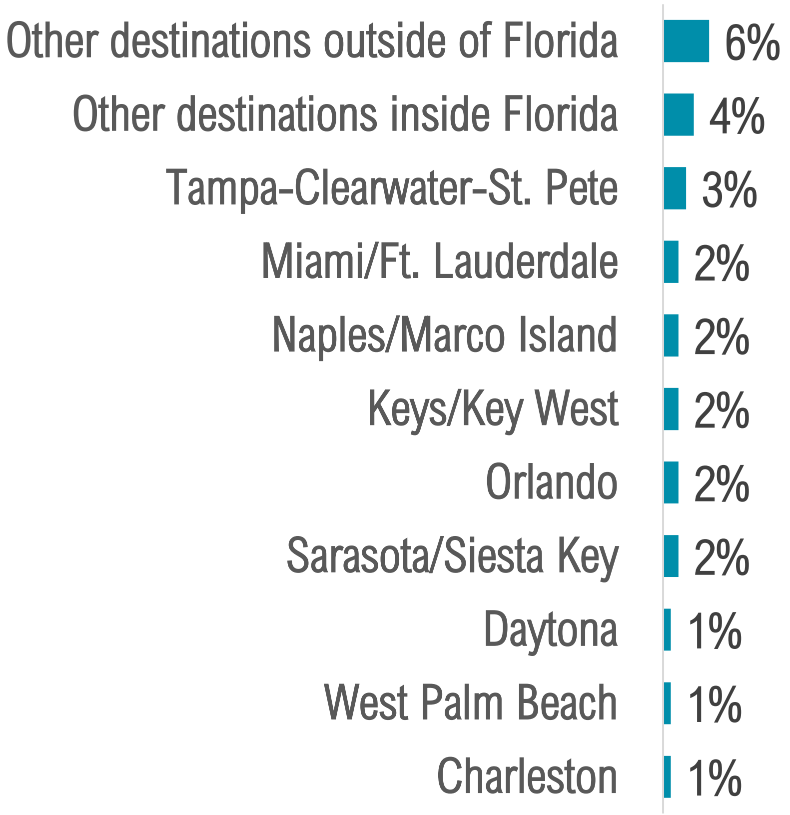
Visitors were **less likely** to **make information requests** in 2021 (-5% points)



[1]Multiple responses permitted.

TRIP PLANNING: OTHER DESTINATIONS CONSIDERED[1]

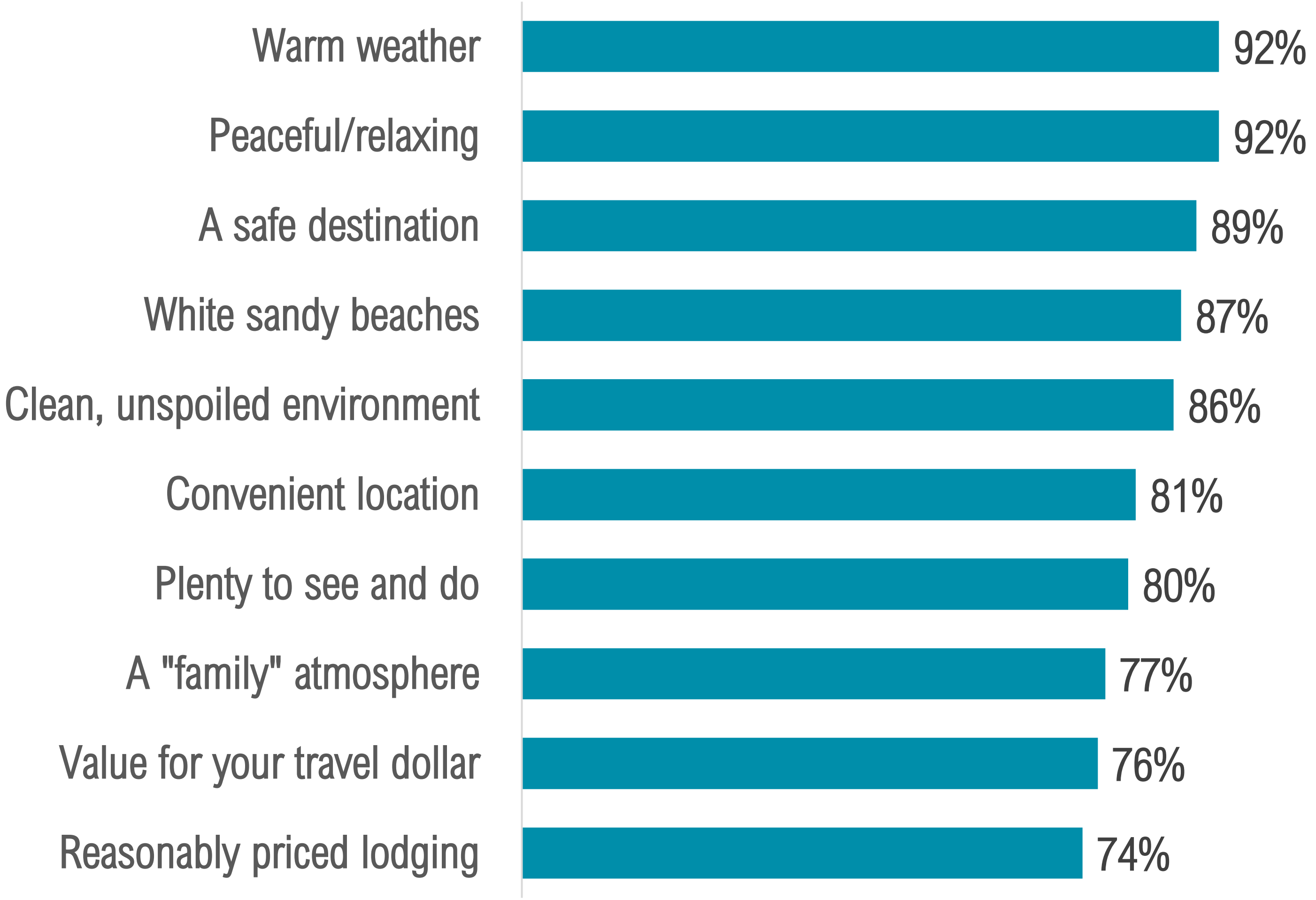
26% of visitors considered **choosing other destinations** when planning their trips.



[1]Coded verbatim responses; multiple responses permitted.

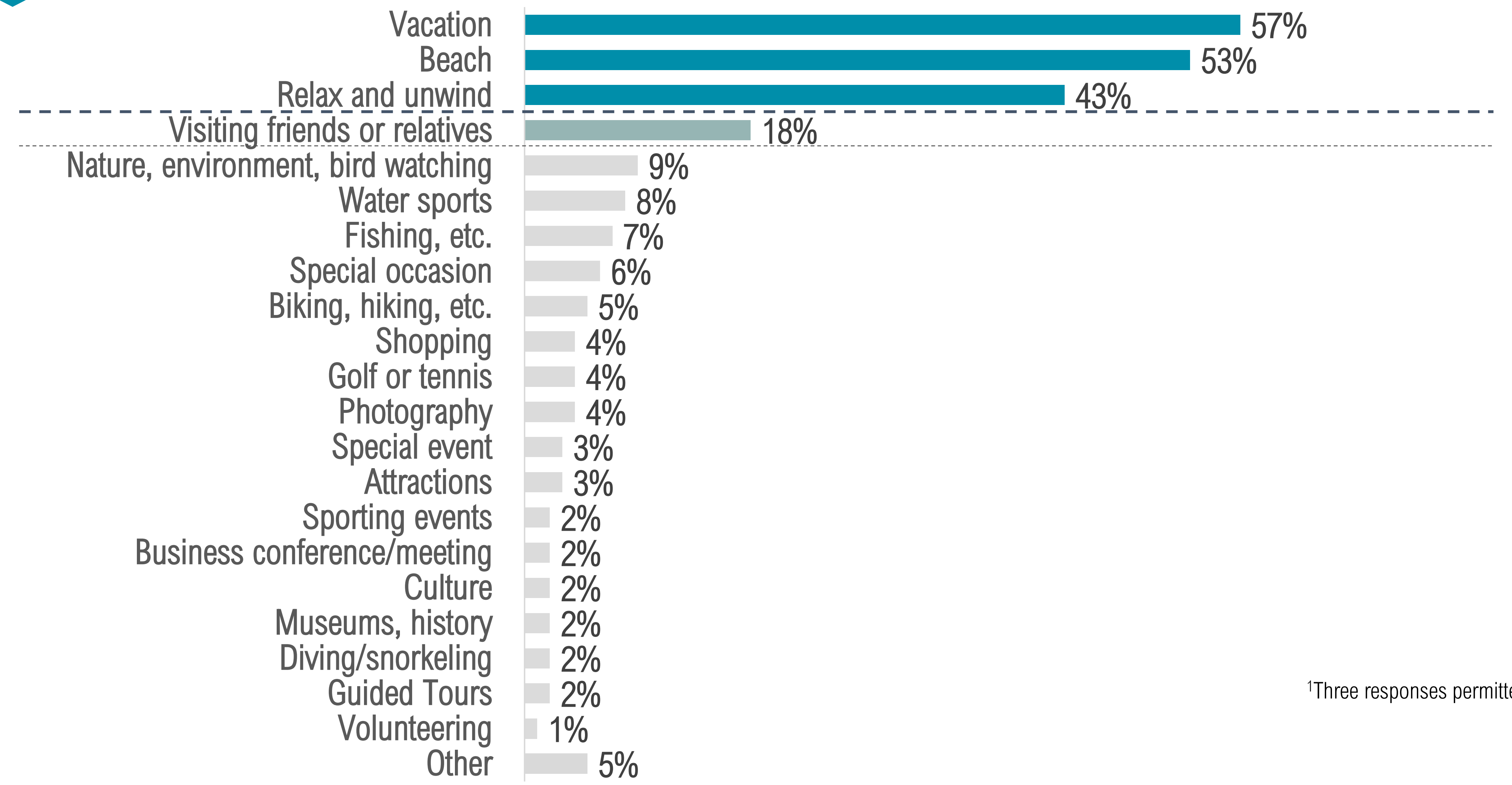
TRIP INFLUENCERS[1]

At least 9 in 10 visitors were heavily influenced by the Fort Myers area being warm and peaceful 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]



[1]Three responses permitted.

PROMOTIONS[1]

38% of visitors **recalled promotions** for the Fort Myers area, primarily on **the internet** or **social media.**

Promotions influenced **16%** of all visitors to come to the Fort Myers area.

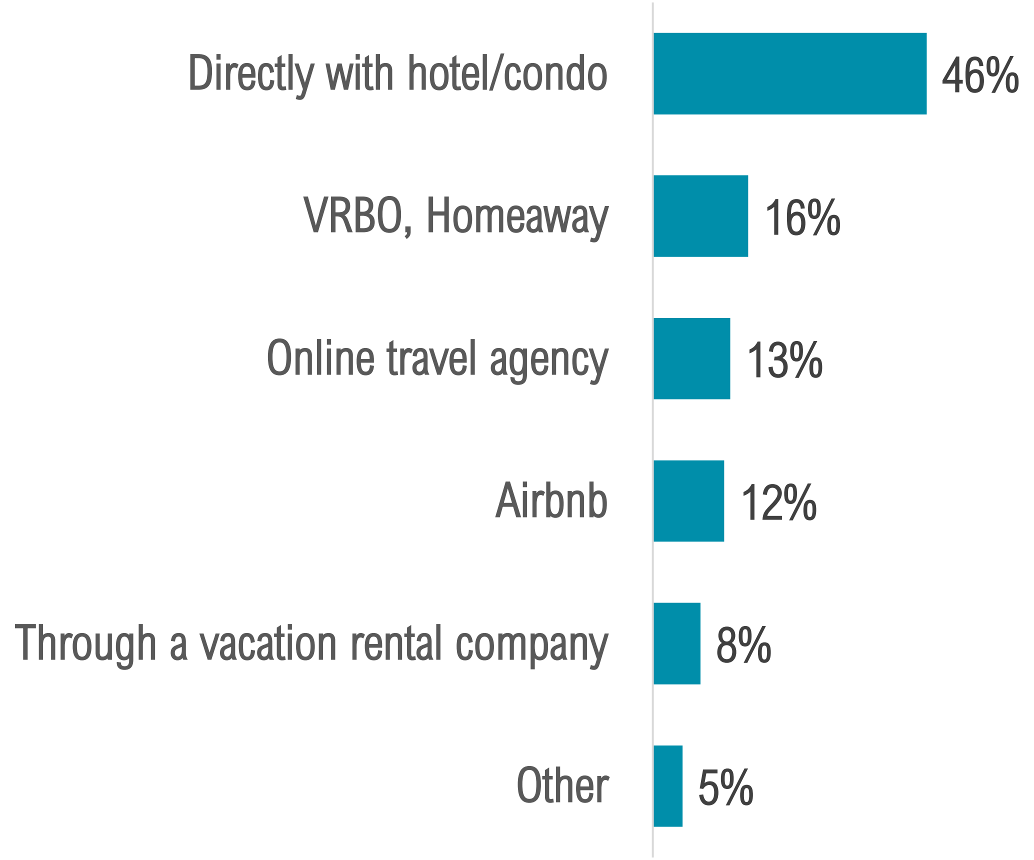
BASE: 38% of visitors who recalled promotions

Source of Promotion

[1]Multiple responses permitted.

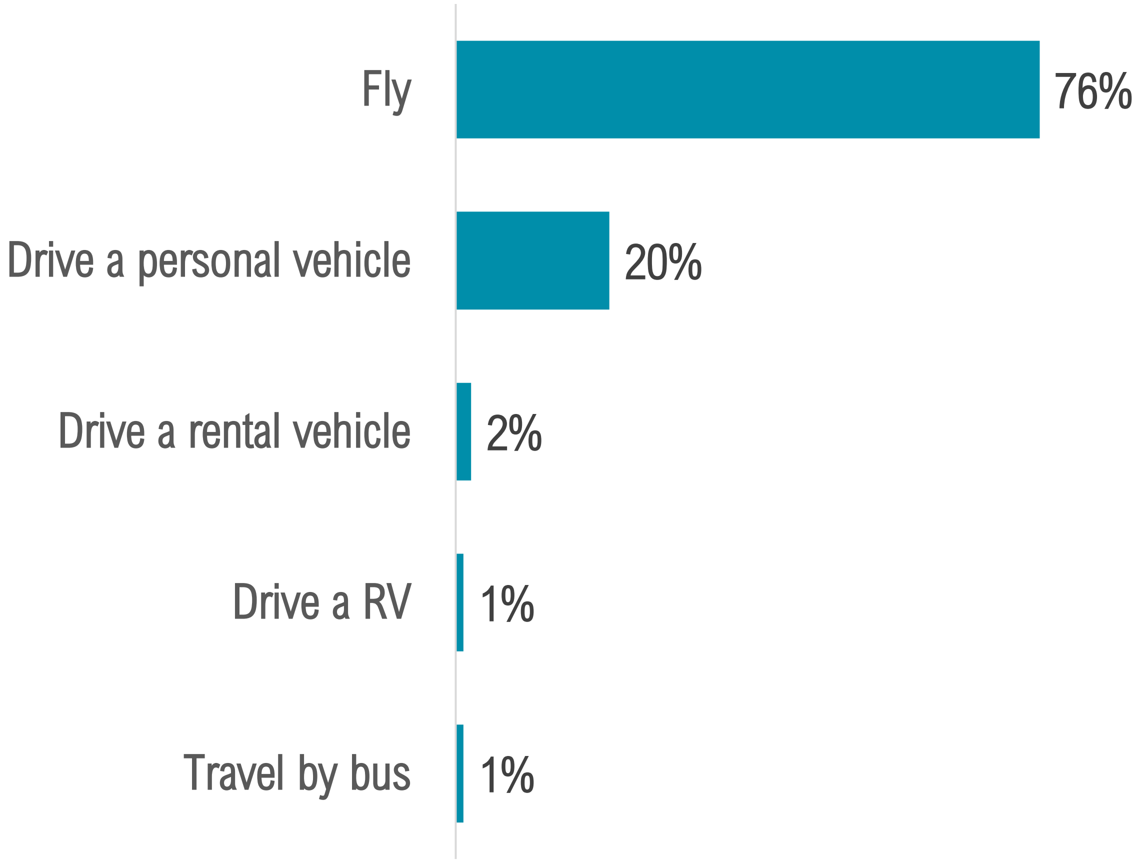
BOOKING

Nearly **half** of visitors who stayed in paid accommodations **booked directly with a hotel/condo**.



TRANSPORTATION

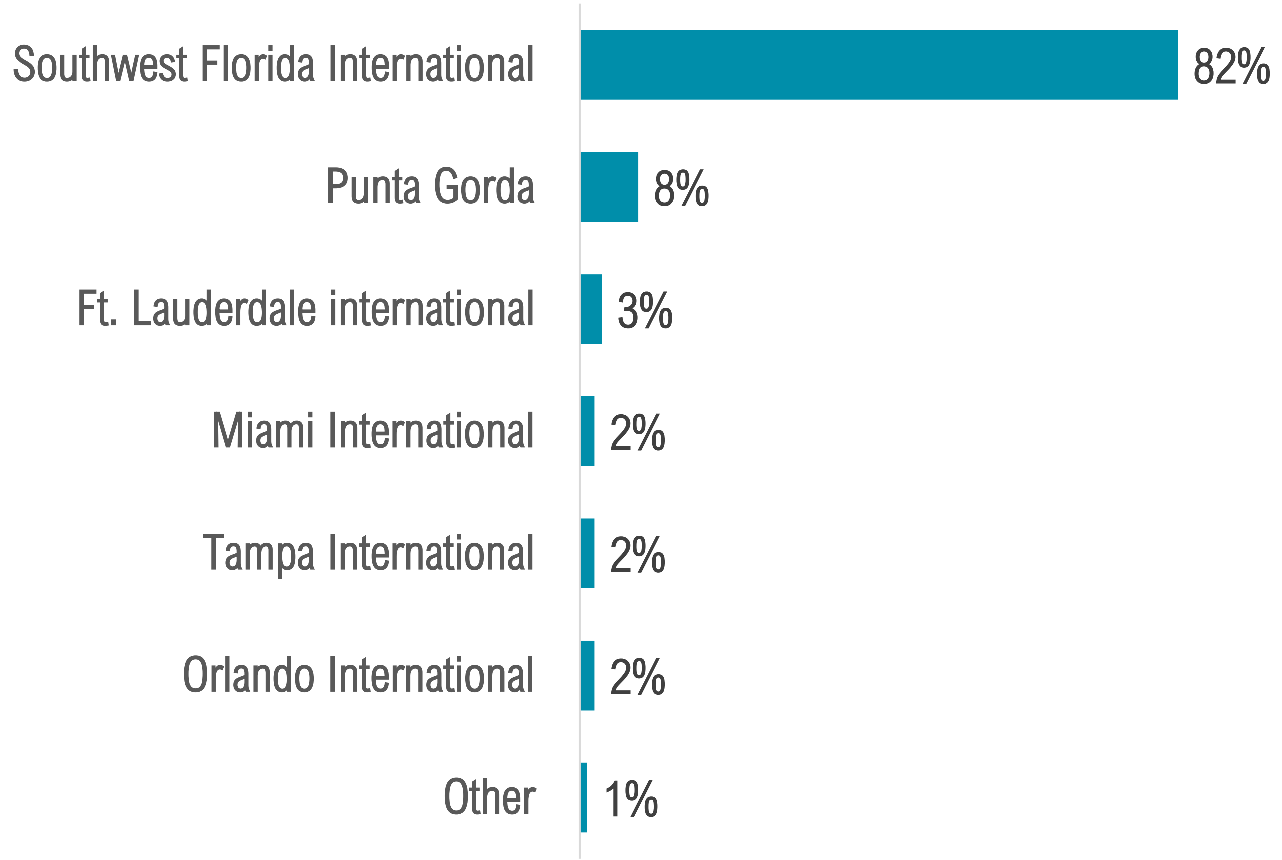
Over 3 in 4 visitors flew to the Fort Myers area.



AIRPORT

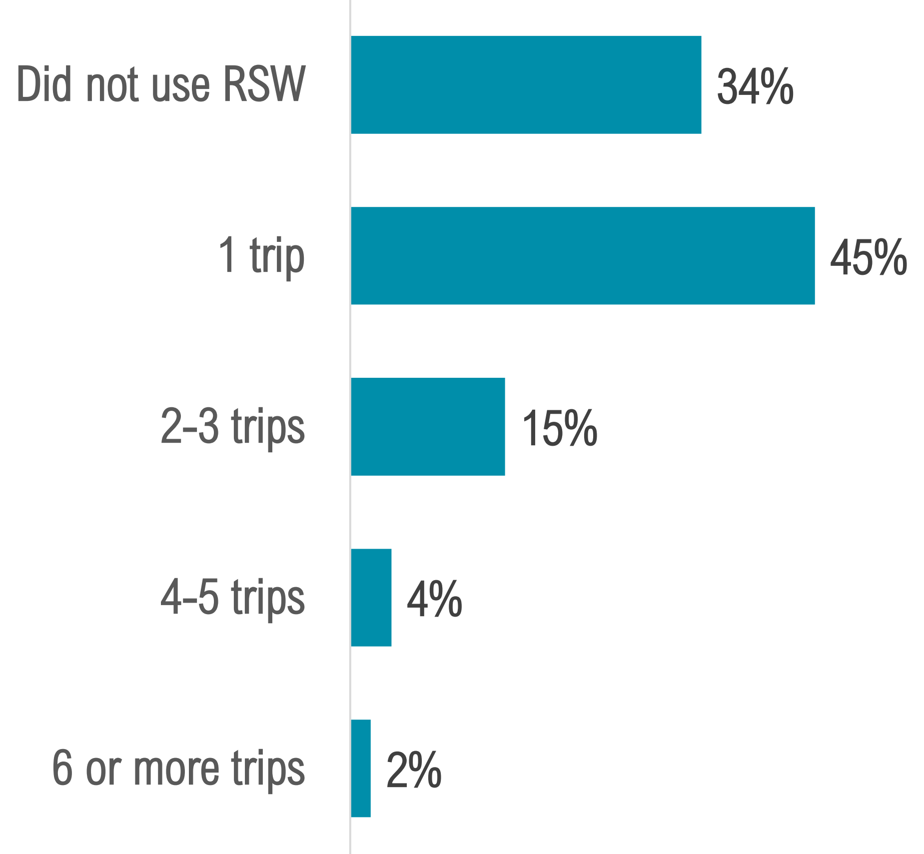
4 in 5 visitors who flew to the Fort Myers area came through **RSW**.

BASE: 76% of visitors who flew



USE OF RSW IN THE PAST YEAR

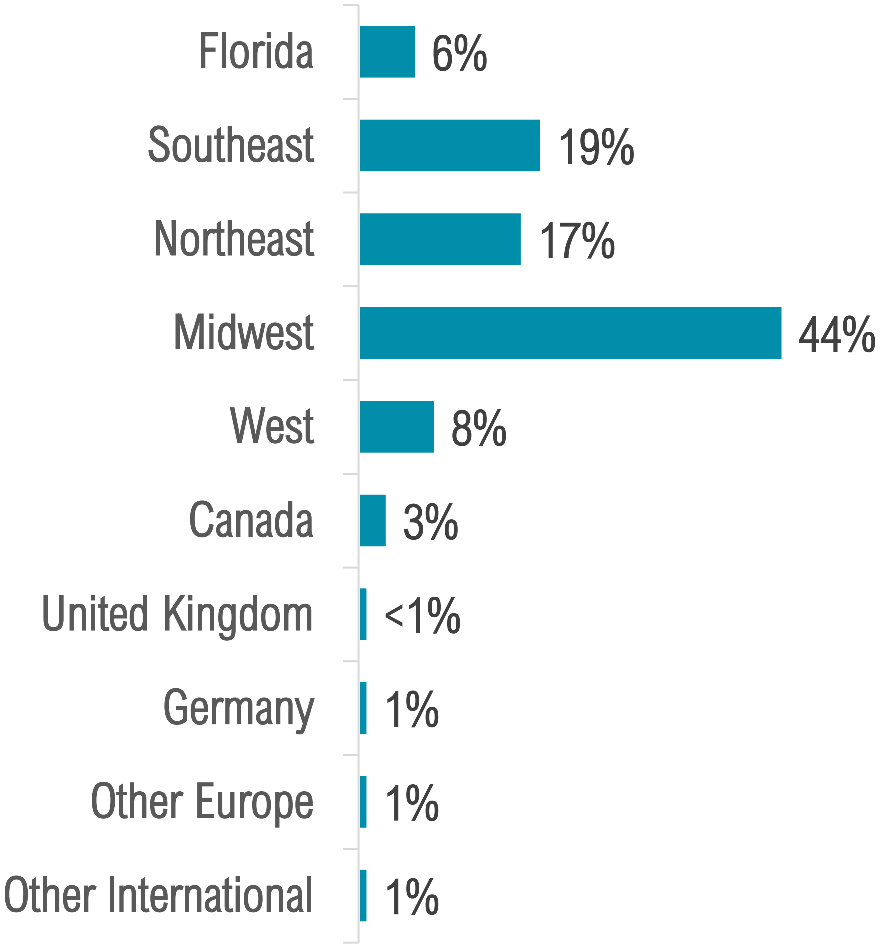
66% of visitors used RSW at least once in the past year.

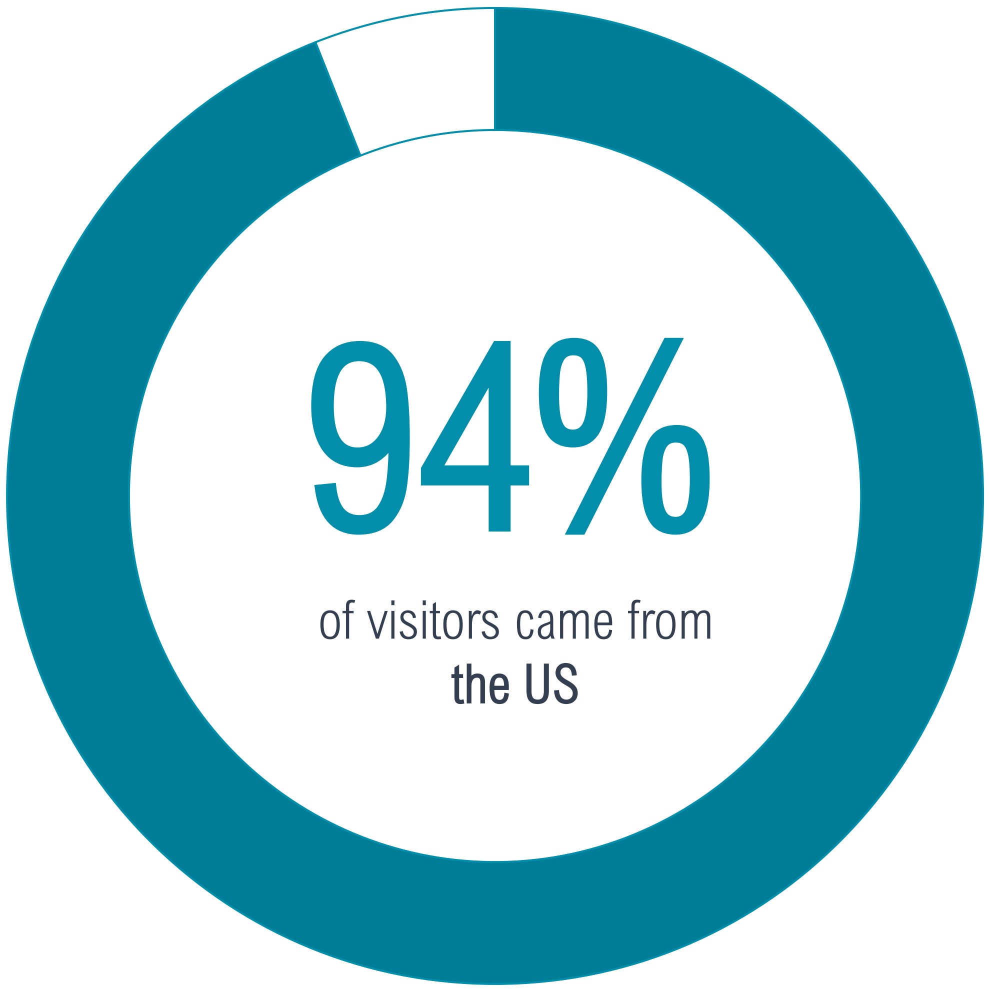


VISITOR JOURNEY: TRAVEL PARTY PROFILE

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

ORIGIN[1]

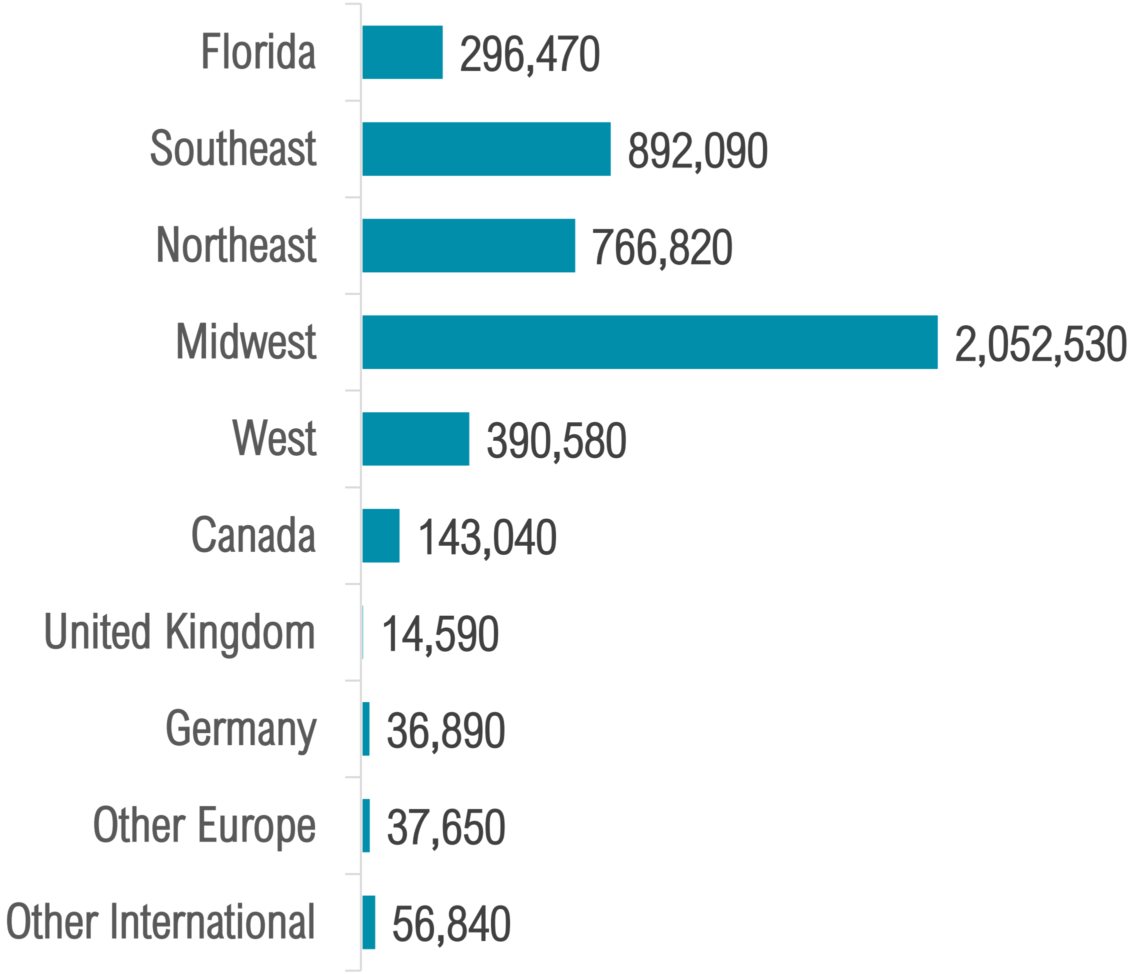




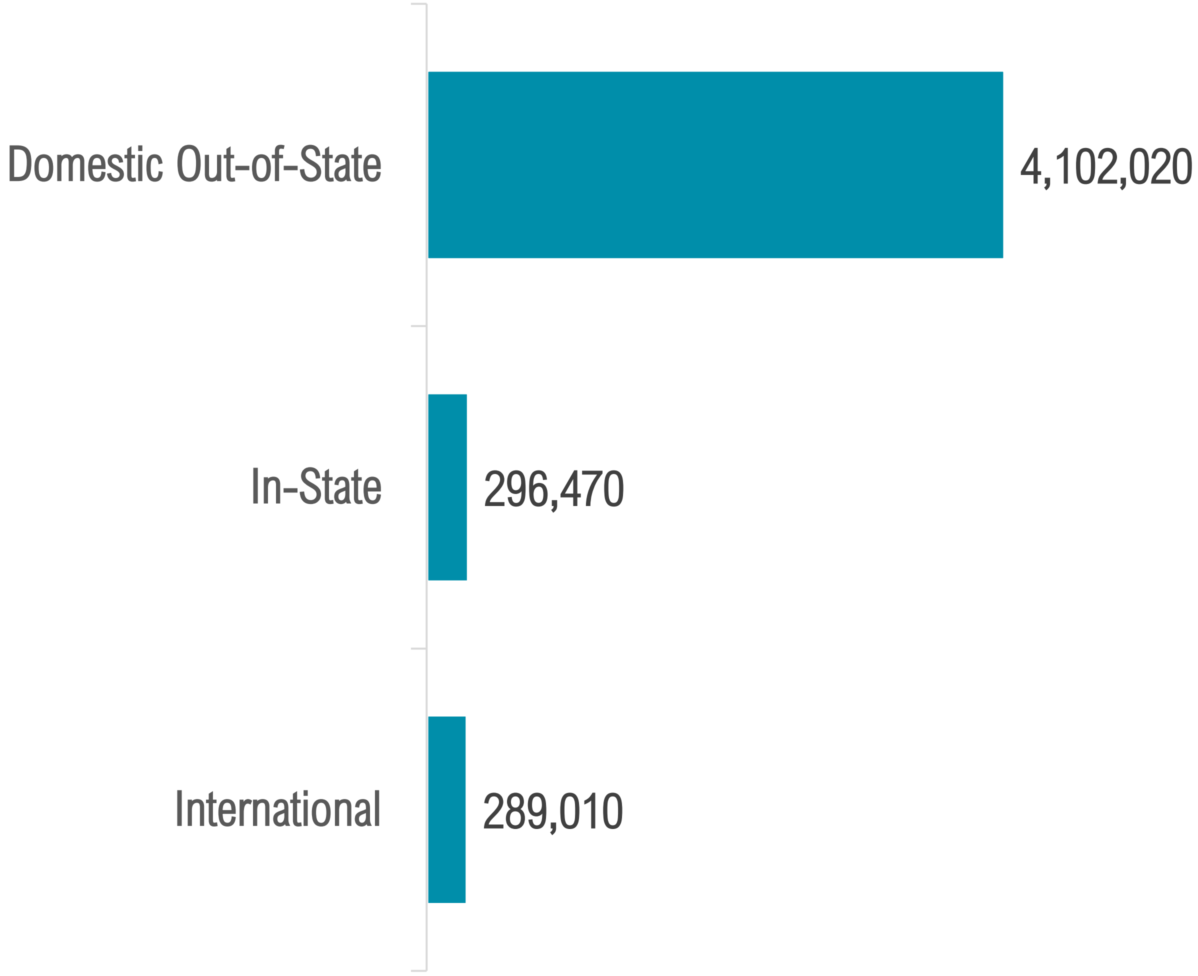
[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers.

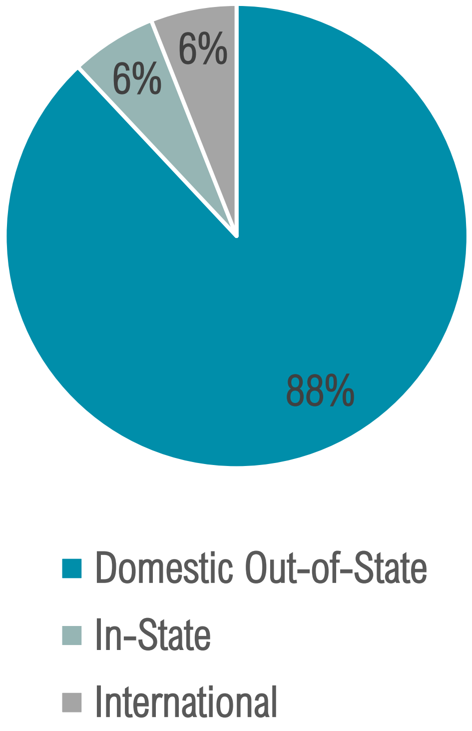
NUMBER OF VISITORS BY ORIGIN

Total of 4,687,500 visitors in 2021.

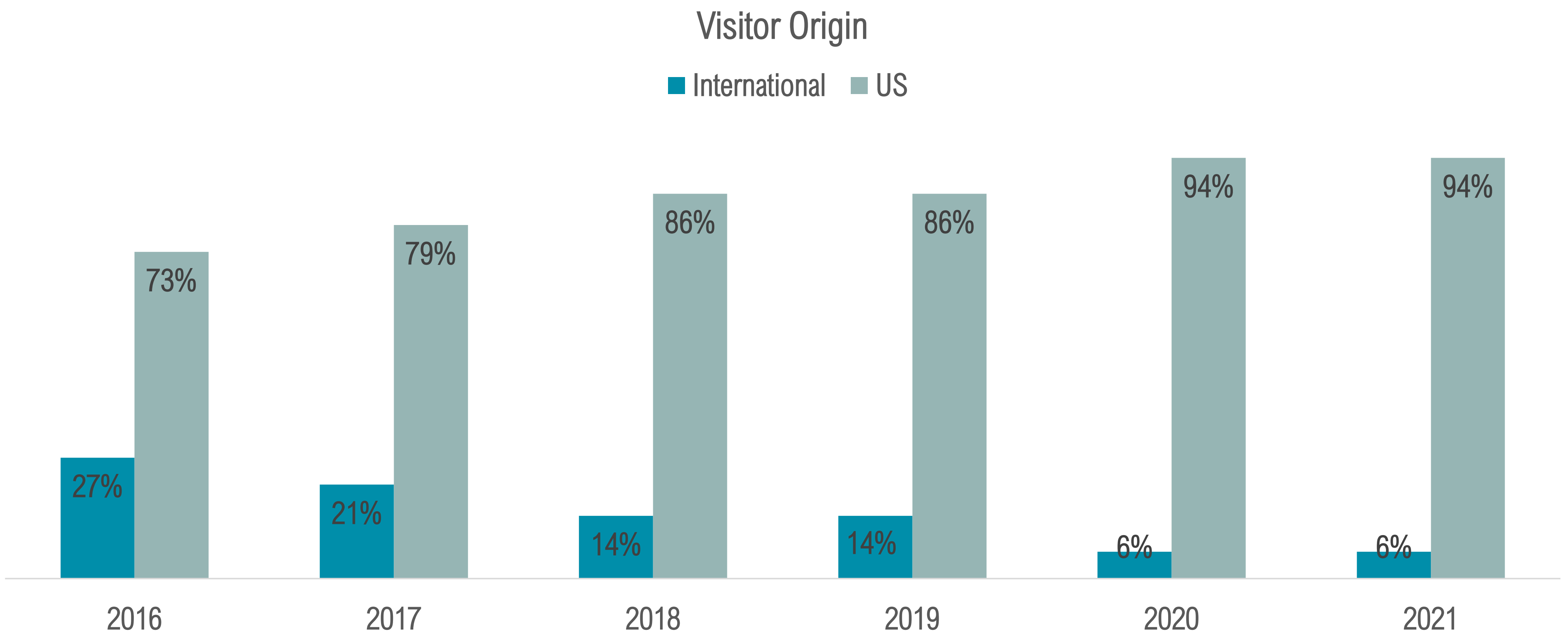


Number Of Visitors By Origin





5 YEAR TREND: US VS. INTERNATIONAL VISITATION



5 YEAR TREND: ORIGIN

Country	2017	2018	2019	2020	2021
Florida	6%	9%	10%	10%	6%
Southeast	13%	16%	12%	16%	19%
Northeast	20%	20%	21%	19%	17%
Midwest	37%	37%	38%	42%	44%
West	3%	3%	5%	7%	8%
International	21%	14%	14%	6%	6%

ORIGIN COUNTRY

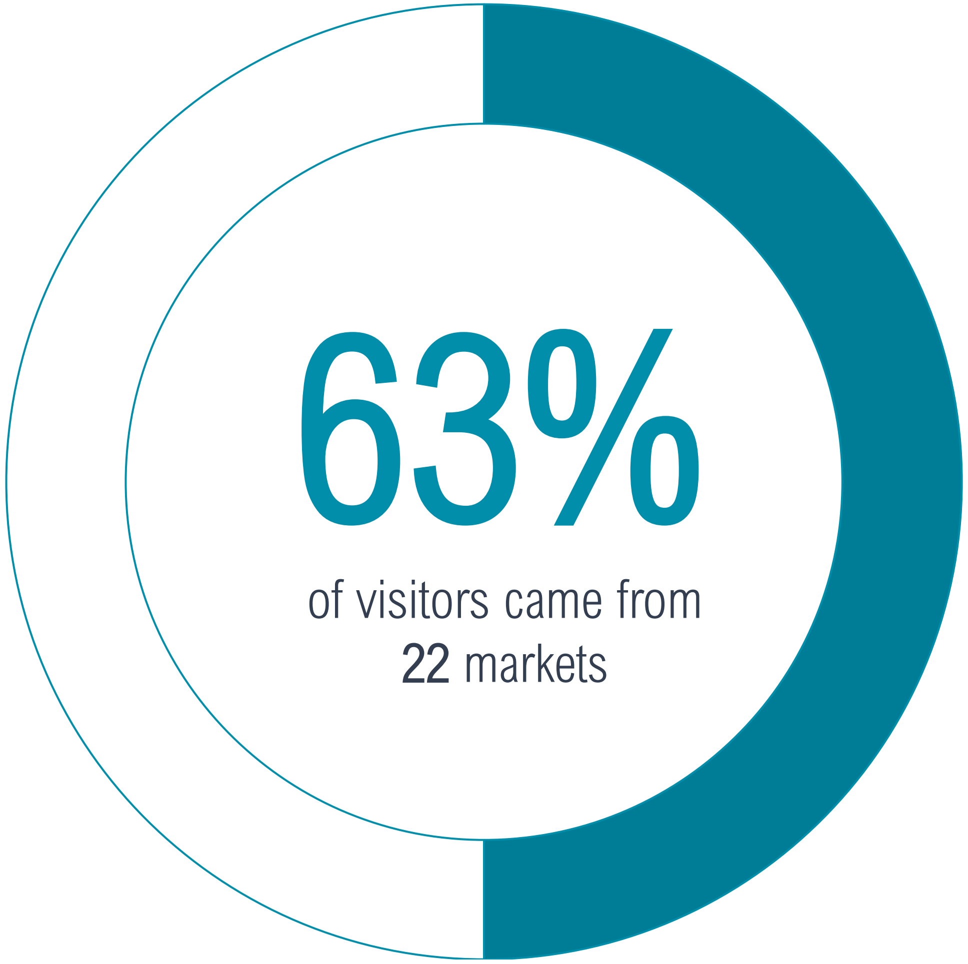
Country	% of Visitors
United States	93.8%
Canada	3.1%
Germany	0.8%
United Kingdom	0.3%
Other	2.0%

5 YEAR TREND: ORIGIN COUNTRY

Country	2017	2018	2019	2020	2021
United States	79%	86%	86%	94%	94%
Canada	8%	4%	4%	3%	3%
Germany	6%	4%	4%	1%	1%
United Kingdom	3%	2%	2%	1%	<1%
Other	4%	4%	4%	1%	2%

TOP ORIGIN MARKETS[1]

Market	Percentage of Visitors
Chicago	6%
New York City	5%
Minneapolis	5%
Detroit	4%
Columbus, OH	4%
Atlanta	4%
Cleveland	3%
Washington DC – Baltimore	3%
Indianapolis	3%
Miami –Ft. Lauderdale	3%
St Louis	2%
Dallas – Ft. Worth	2%
Boston	2%
Milwaukee	2%
Kansas City	2%
Cincinnati	2%
Green Bay	2%
Denver	2%
Jacksonville	2%
Pittsburgh	2%
Nashville	2%
Grand Rapids	2%



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

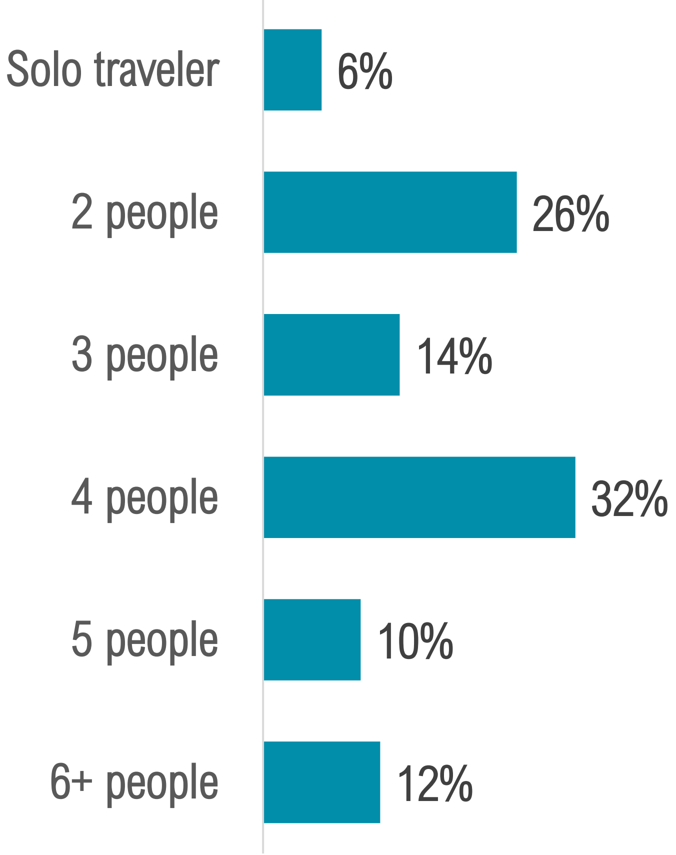
TRAVEL PARTY SIZE AND COMPOSITION

Travel Party Size

Visitors traveled in a party composed of 3.5[1] people.

Travel with Children

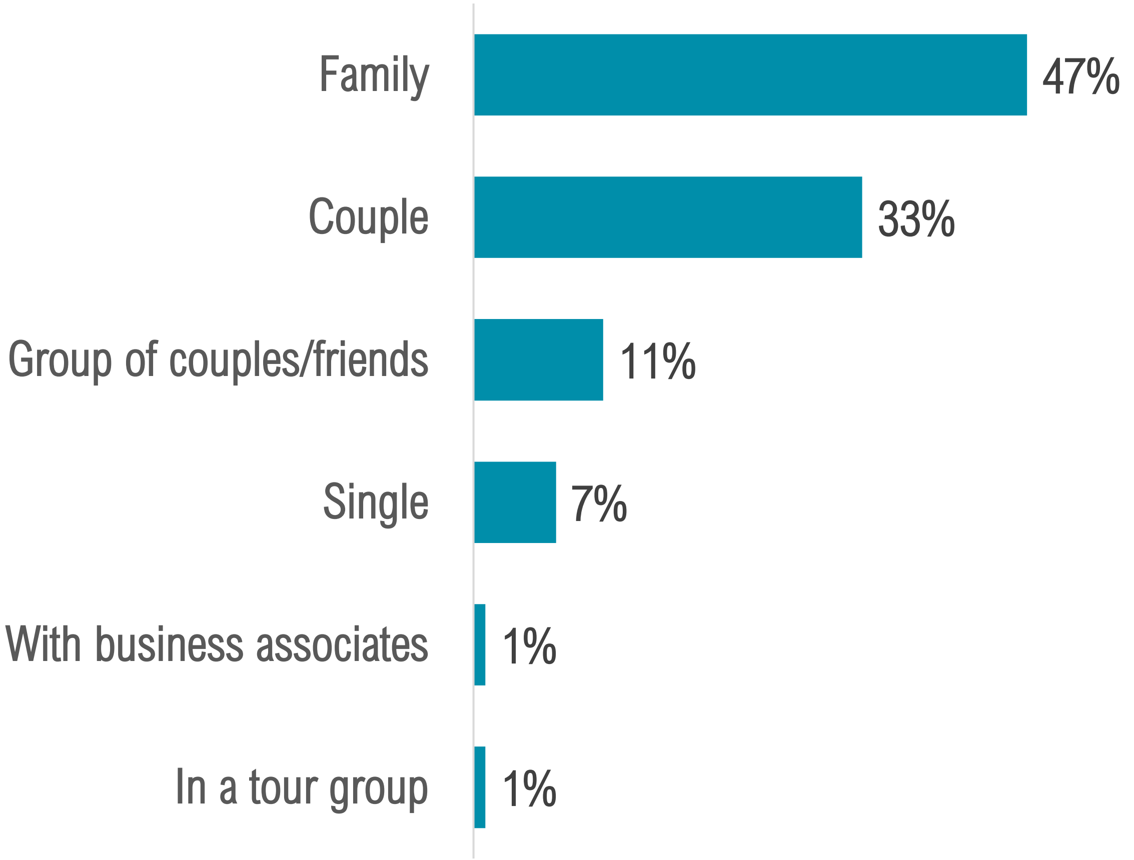
38% of visitors traveled with children under the age of 18.



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

TRAVEL PARTY TYPE

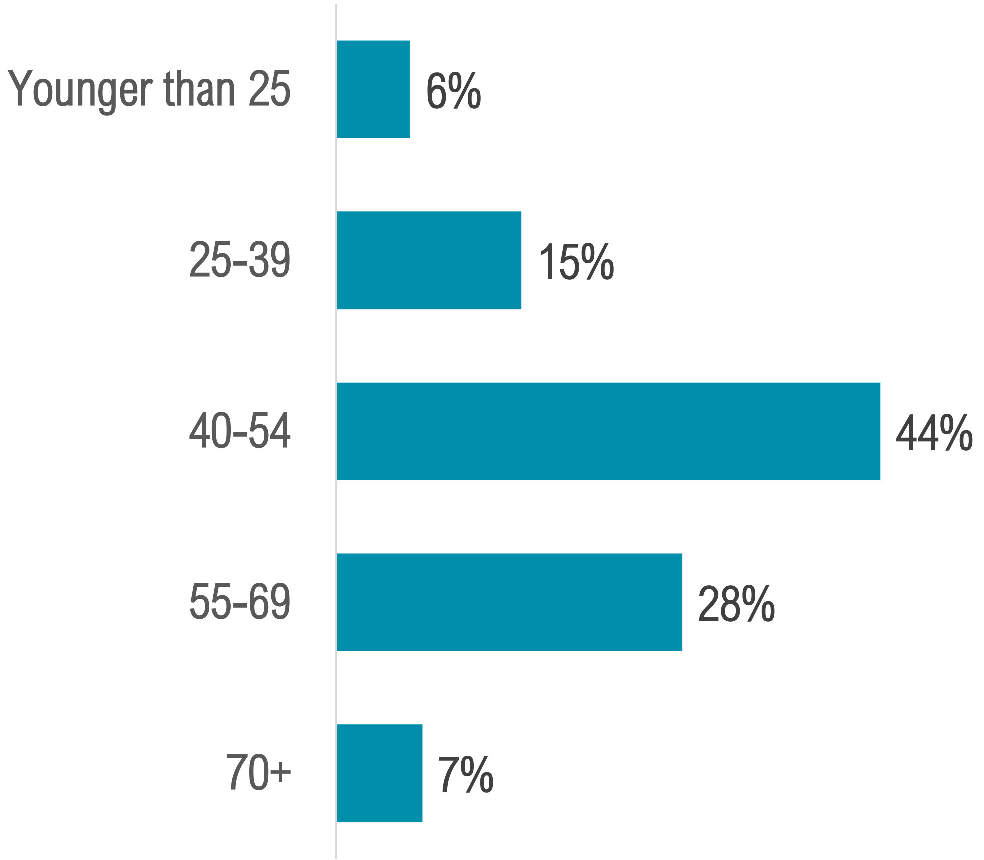
Visitors primarily traveled as a family or as a couple.



AGE

Average Age

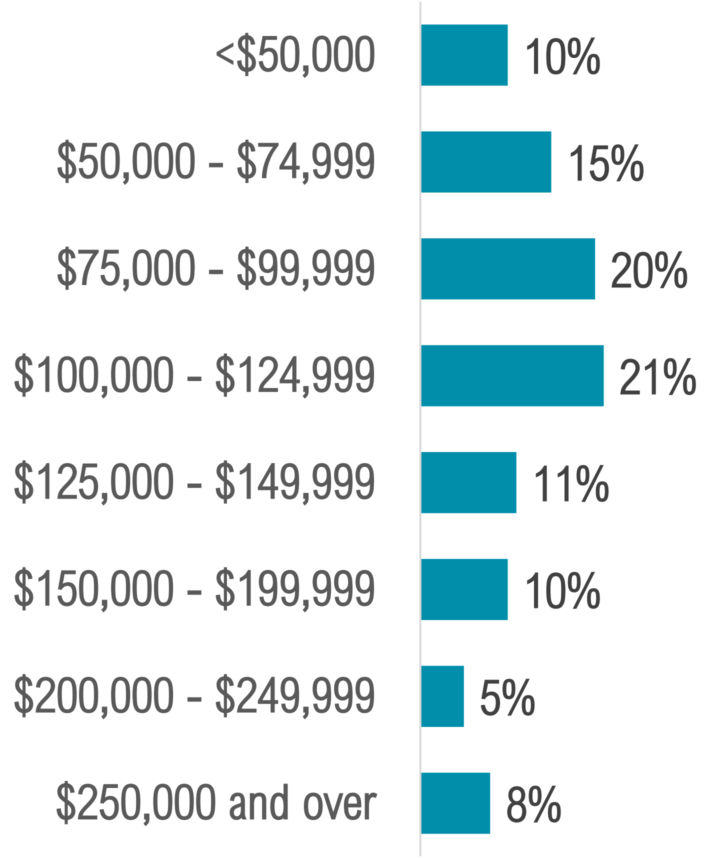
The average age of 2021 visitors was 50 years old.



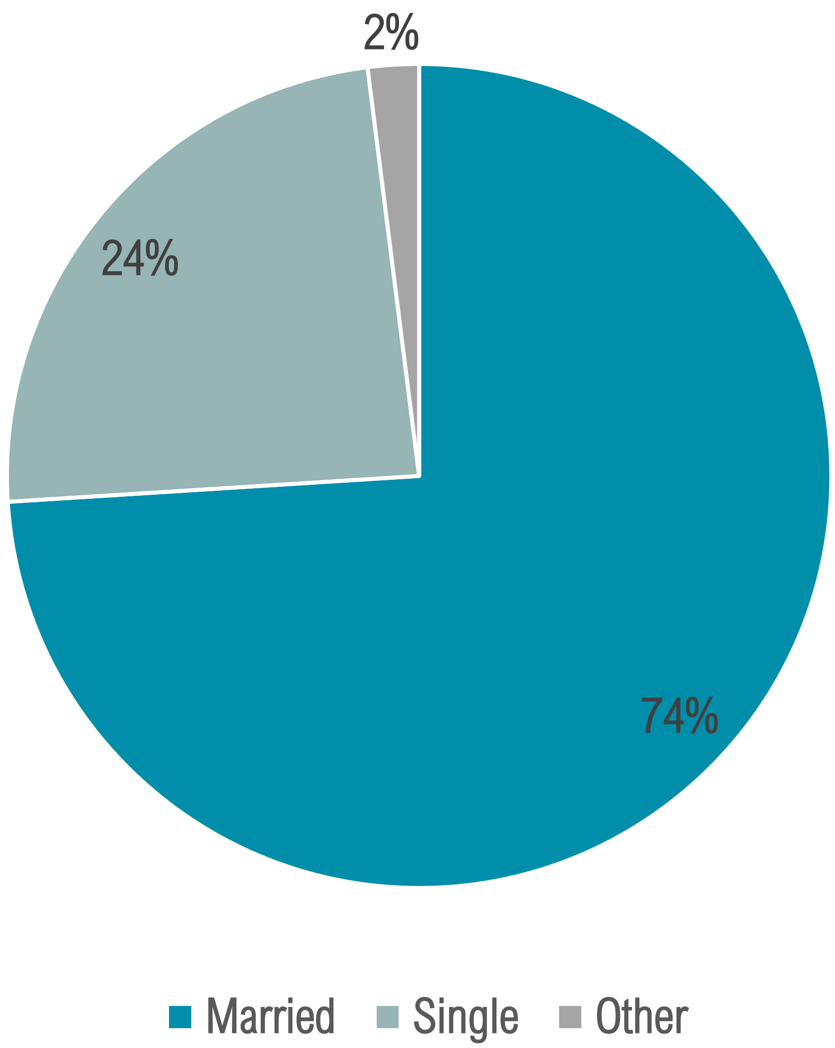
HOUSEHOLD INCOME

Median Household Income
2021 visitors had a median household income of **$105,950.**

1 in 8 visitors earned over **$200,000.**



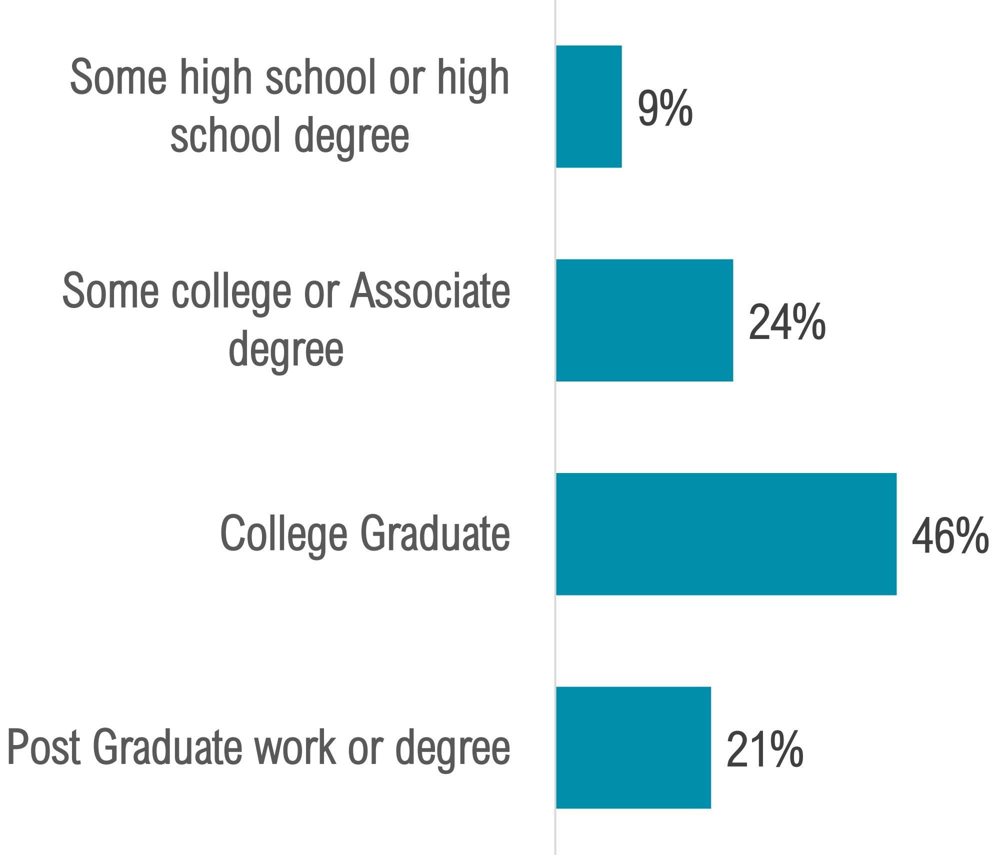
MARITAL STATUS



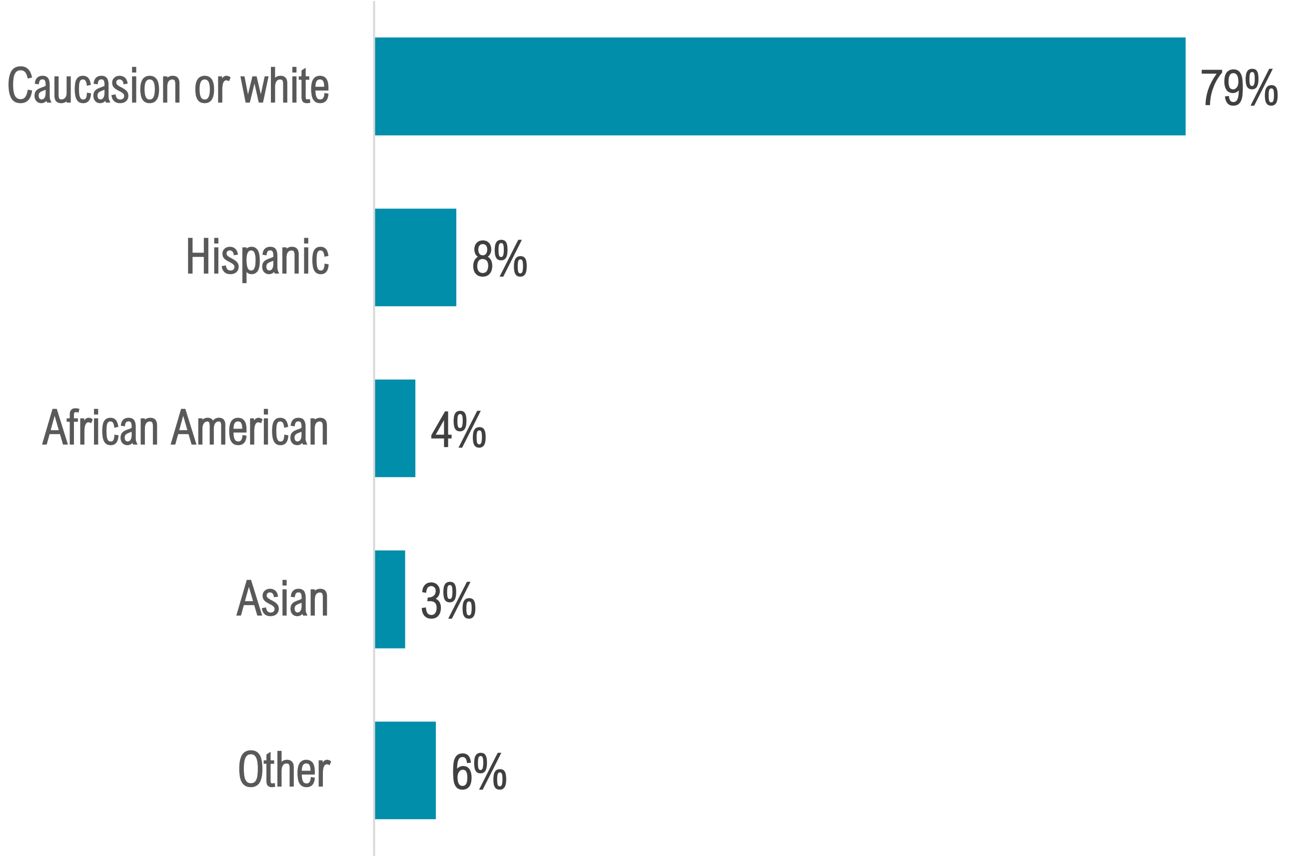
EDUCATION

College Education

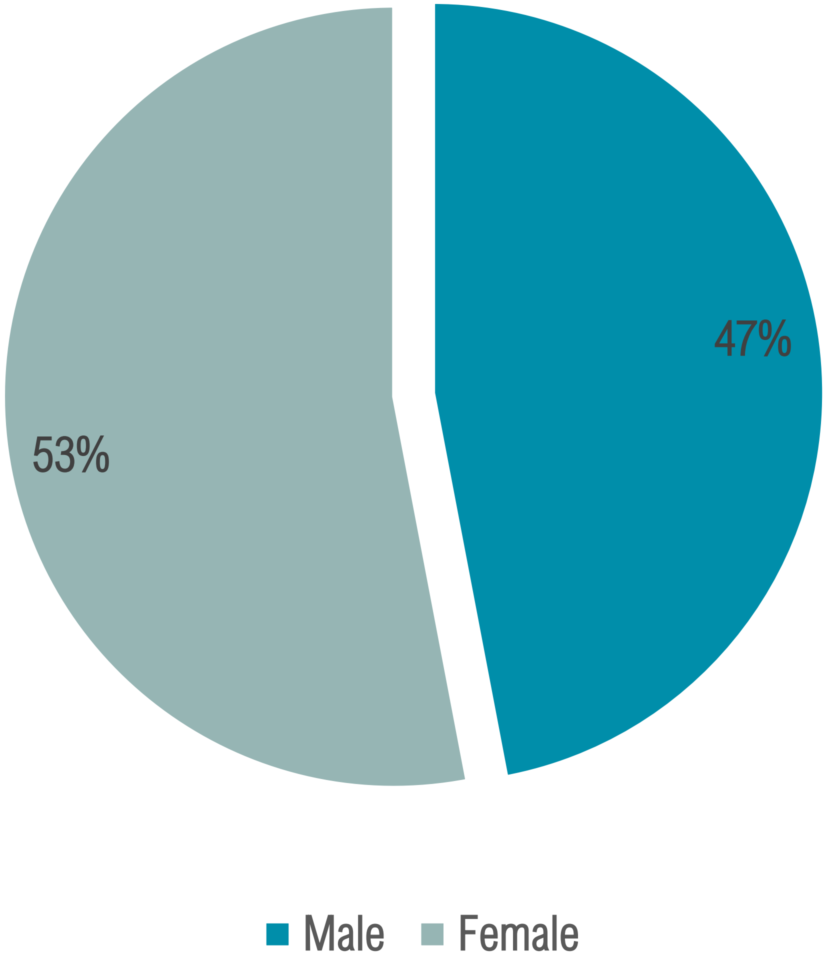
67% of 2021 visitors were college graduates.



RACE/ETHNICITY



GENDER

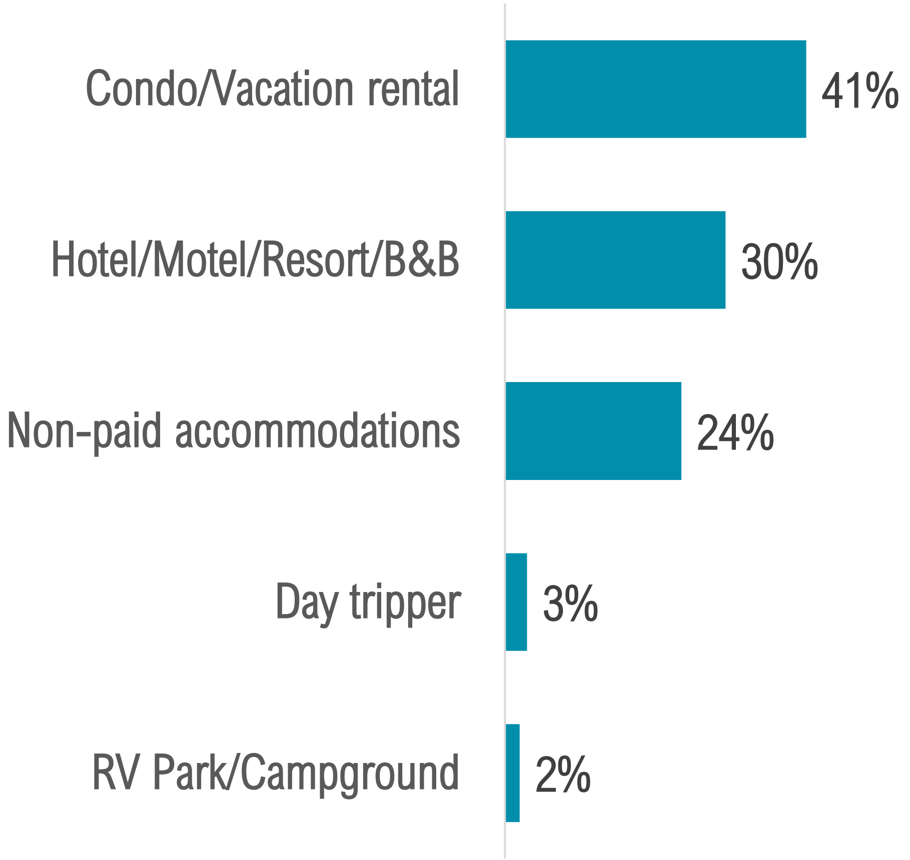


VISITOR JOURNEY: TRIP EXPERIENCE

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.



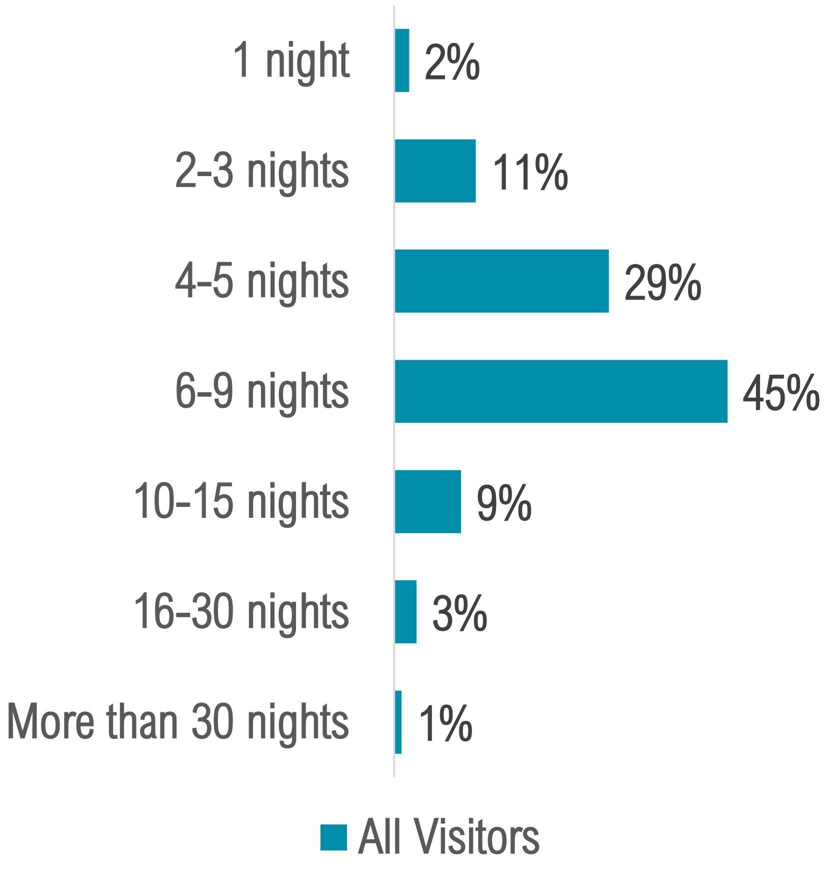
NIGHTS STAYED

All Visitors

Visitors spent **6.9**[1] nights in the Fort Myers area.

Visitors Staying in Paid Accommodations

Visitors staying in paid accommodations spent **5.7**[2] nights in the Fort Myers area.



[1]When including extended stay visitors, average nights stayed for all visitors was 8.7 nights.
Source: Visitor Tracking Survey
[2]When including extended stay visitors, average nights stayed for visitors staying in paid accommodations was 6.7 nights.
Source: Visitor Tracking Survey

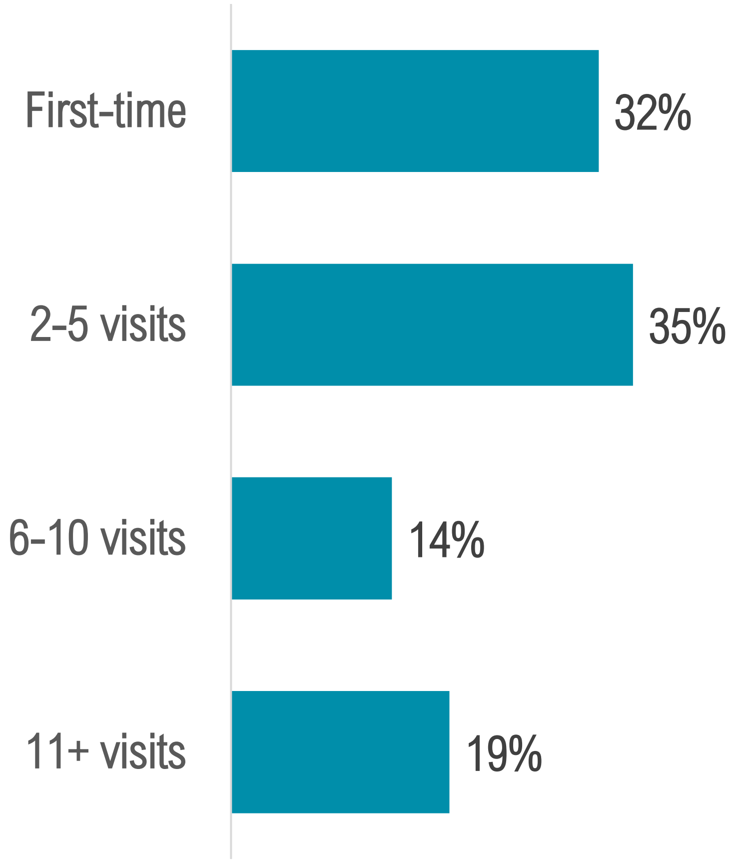
FIRST TIME AND EXPERIENCED VISITORS

First Time vs. Repeat Visitors

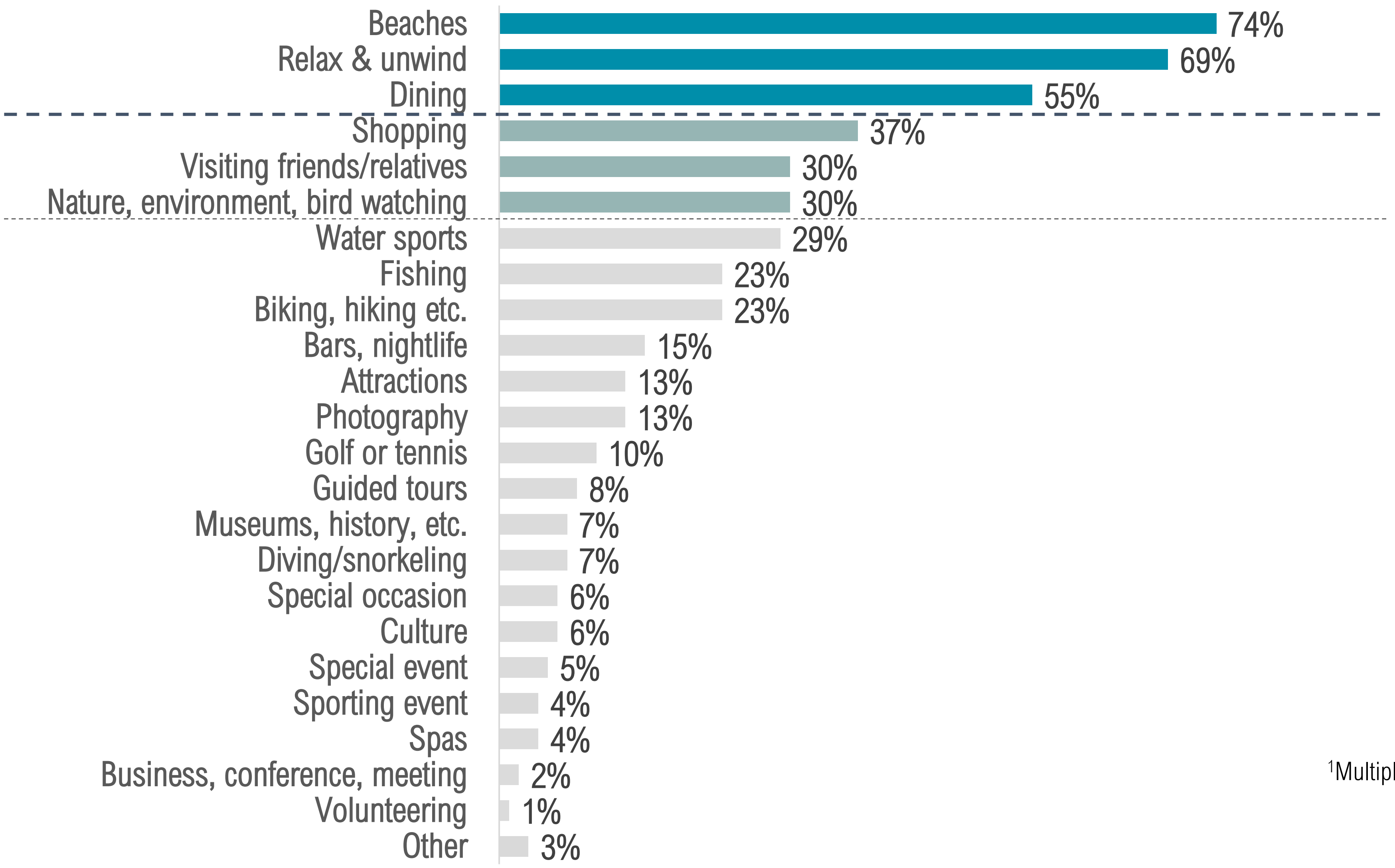
68% of visitors had previously visited the Fort Myers area, while 32% were visiting for the first time.

First Time vs. Repeat Visitors

1 in 5 visitors were loyalists, i.e., they had visited more than 10 times.

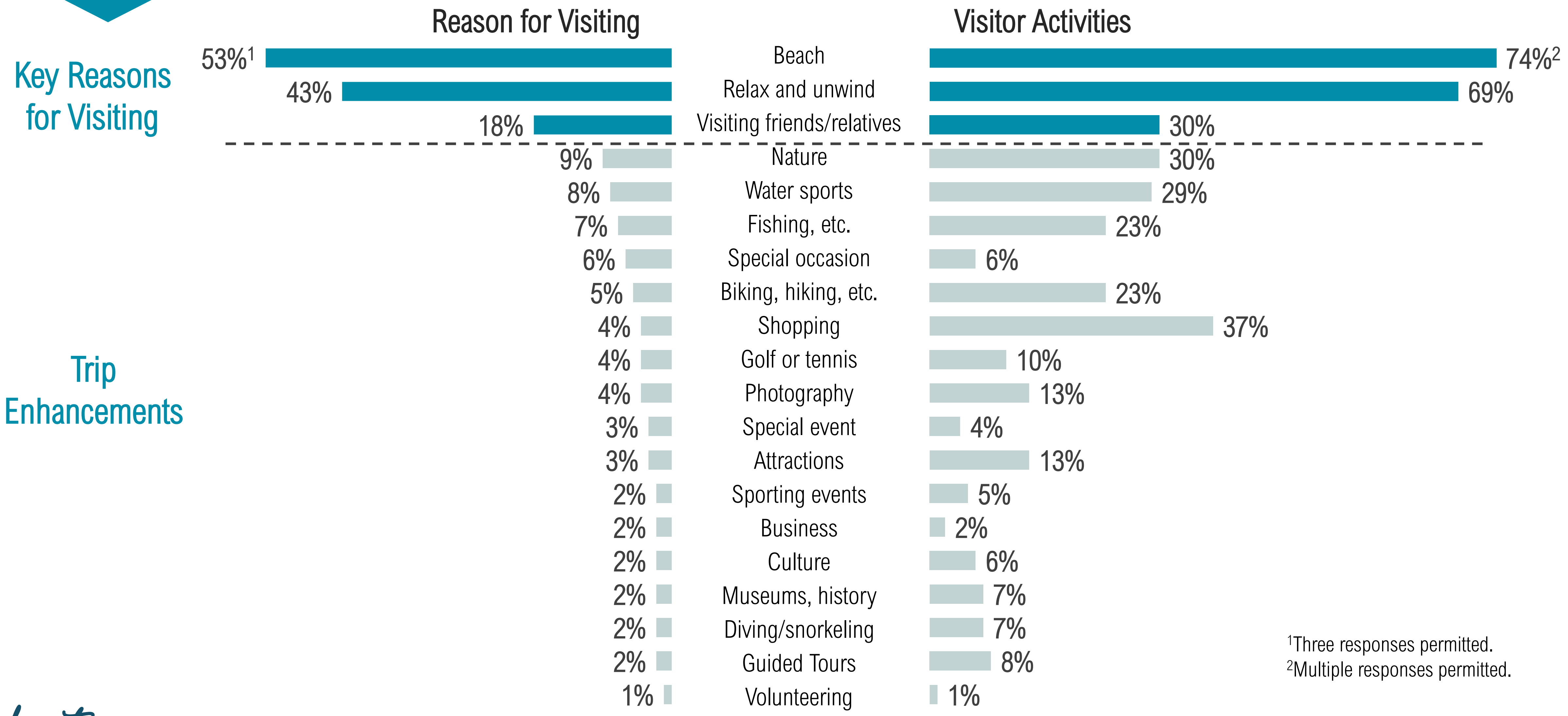


VISITOR ACTIVITIES[1]



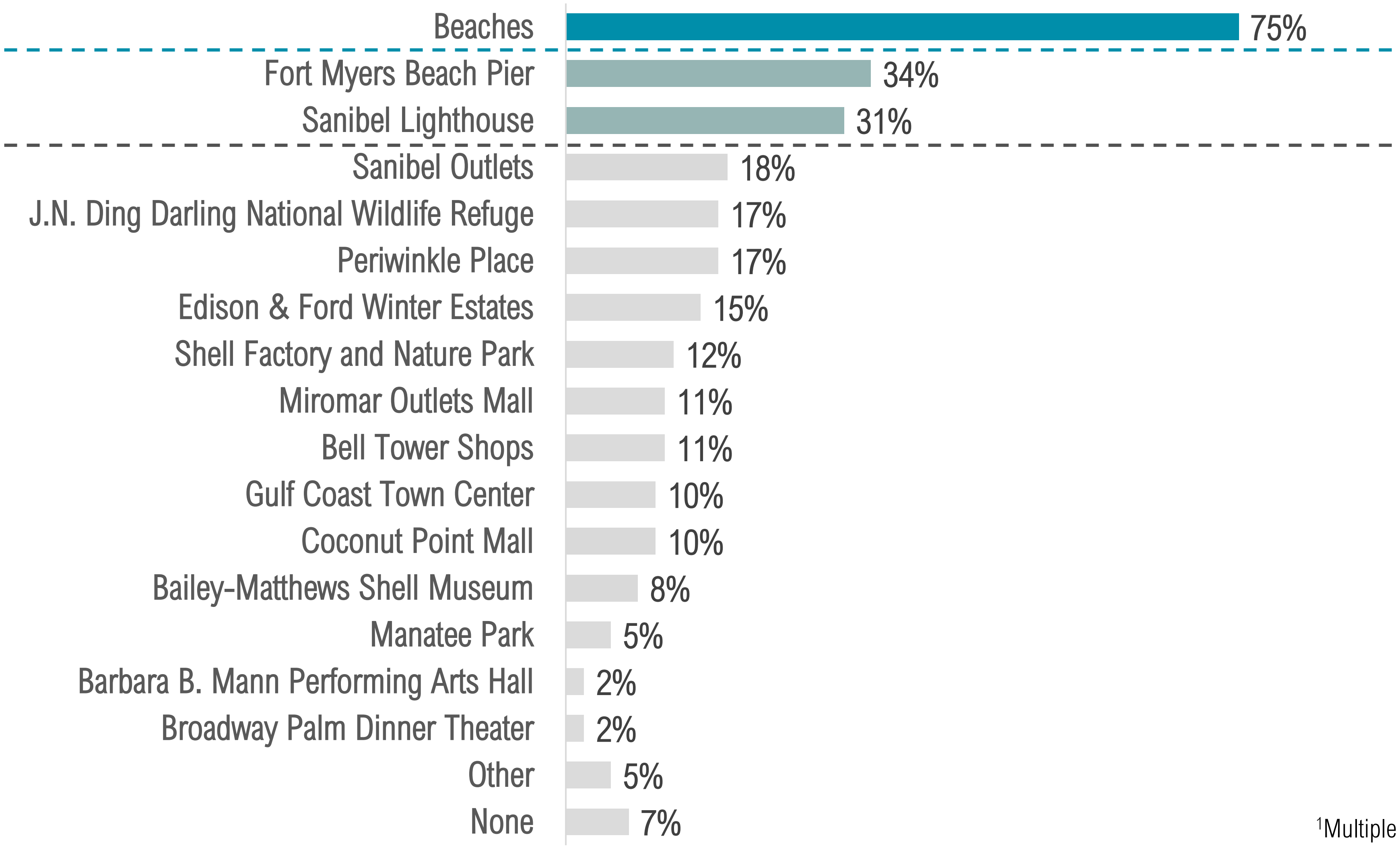
[1]Multiple responses permitted.

REASON FOR VISITING VS. VISITOR ACTIVITIES



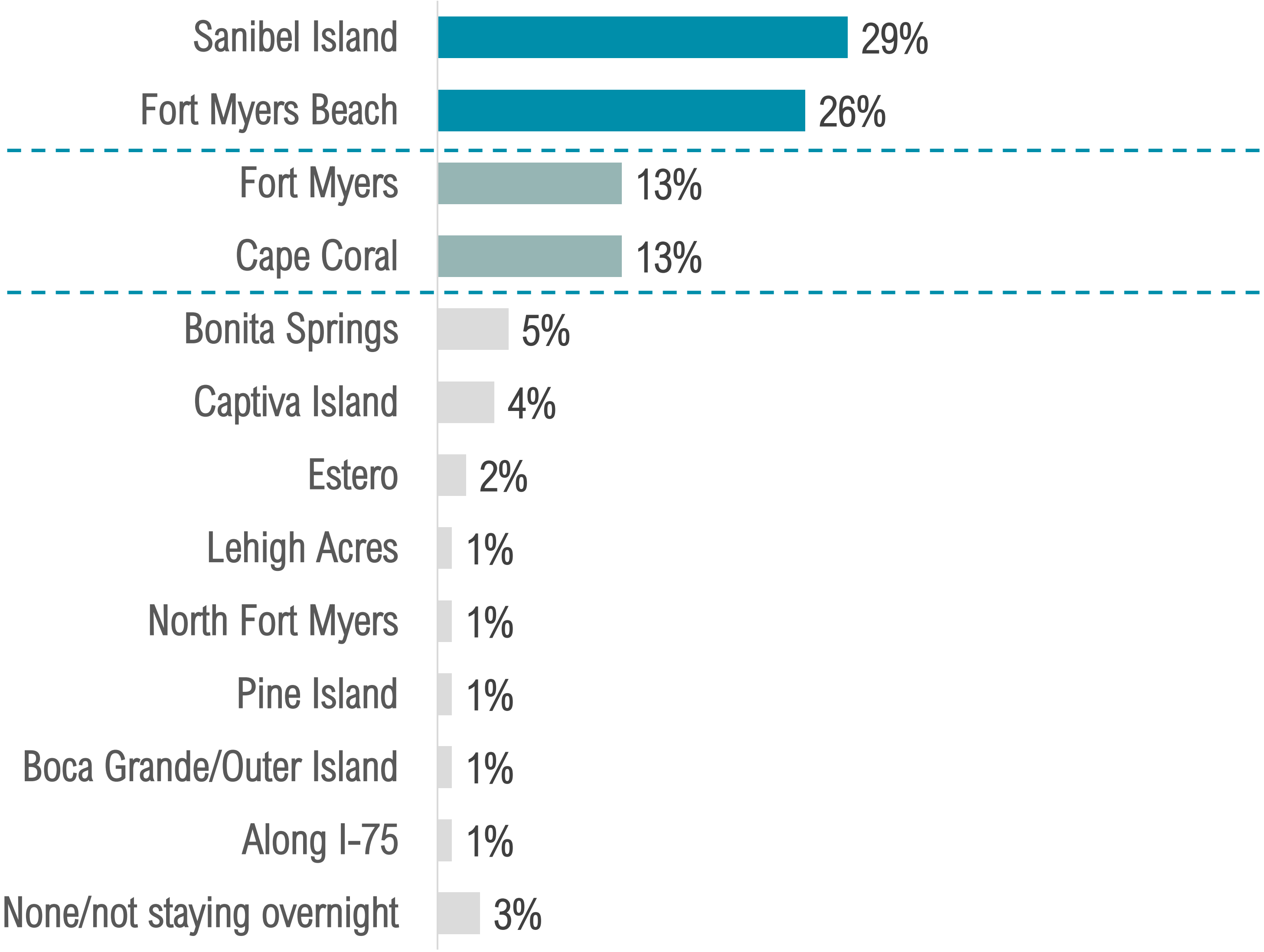
[1]Three responses permitted.
[2]Multiple responses permitted.

ATTRACTIONS VISITED[1]



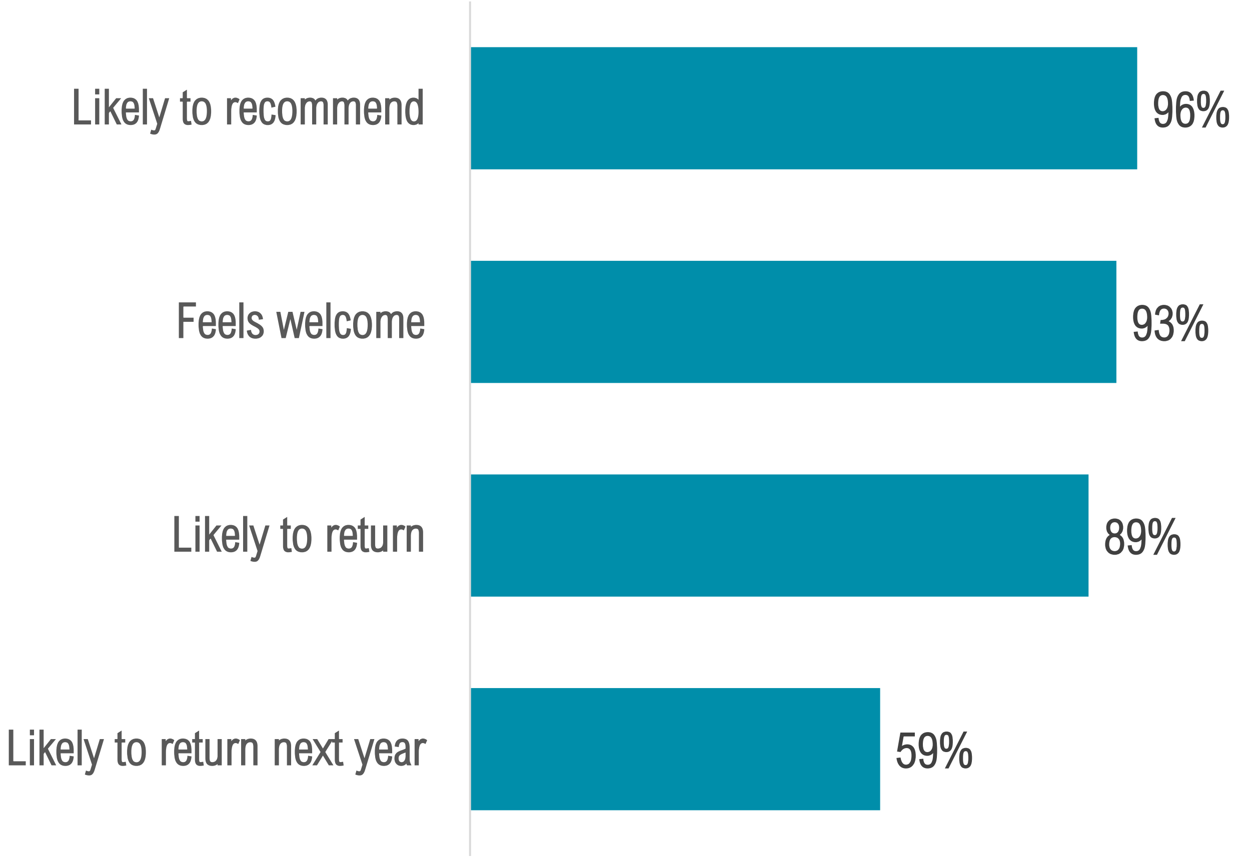
[1]Multiple responses permitted.

COMMUNITY STAYED



VISITOR JOURNEY: POST-TRIP EVALUATION

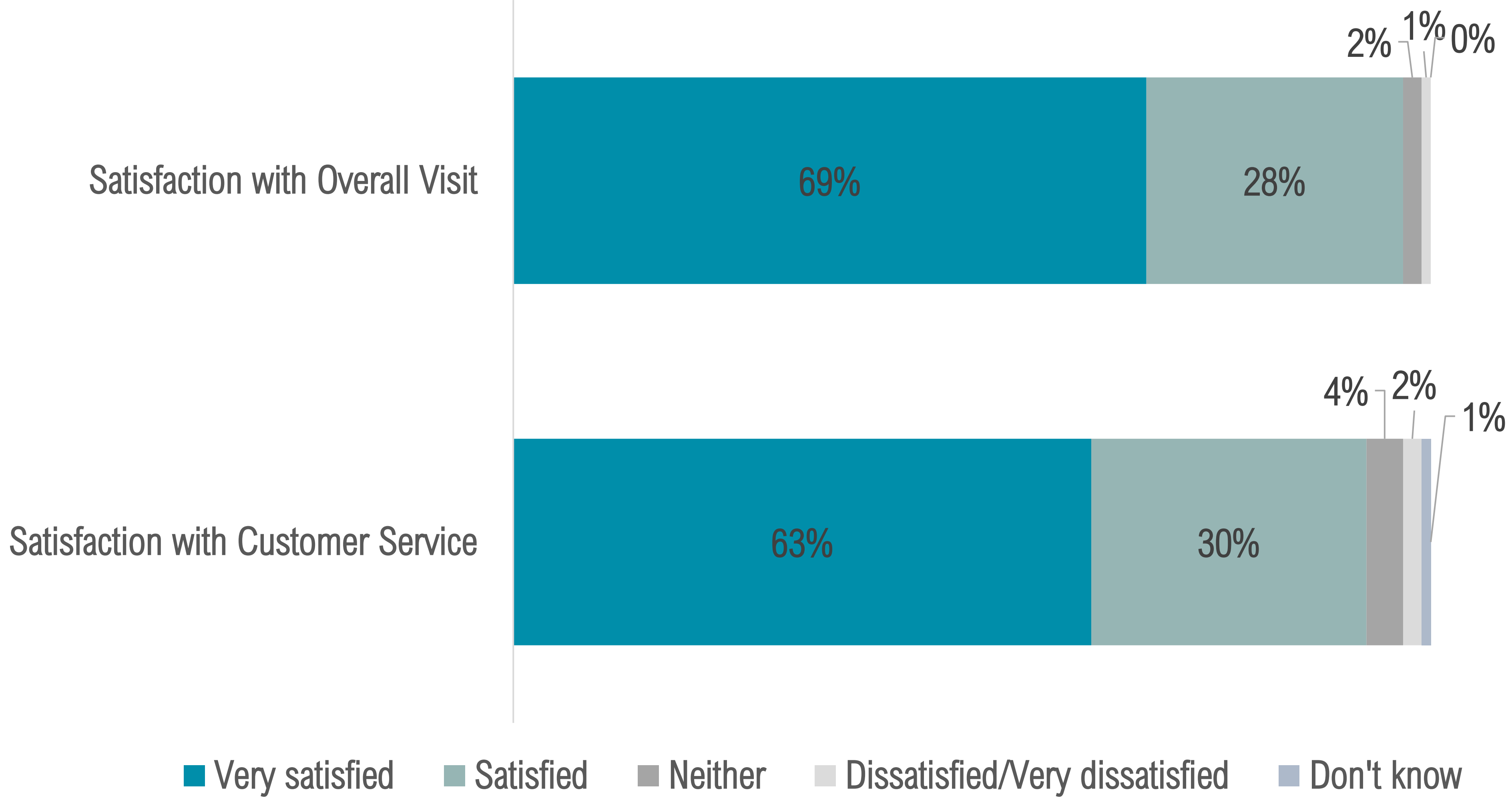
SATISFACTION



SATISFACTION RATINGS

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2020	2021	2020	2021	2020	2021	2020	2021
Likely to Recommend	90%	91%	95%	97%	94%	95%	91%	96%
Likely to Return	84%	81%	95%	94%	93%	91%	85%	84%
Likely to Return Next Year	42%	35%	77%	66%	68%	57%	57%	44%

SATISFACTION



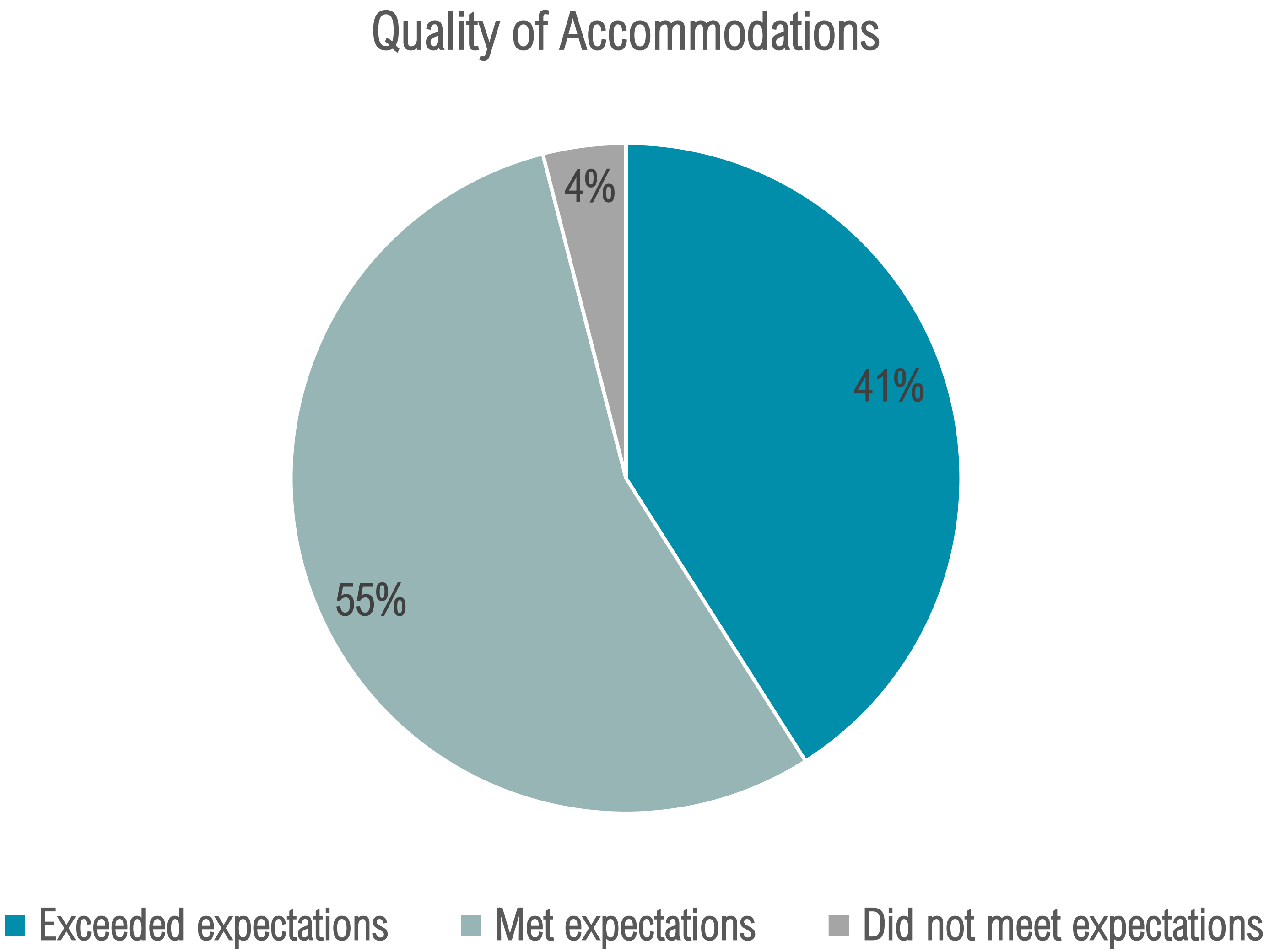
SATISFACTION RATINGS: OVERALL VISIT

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2020	2021	2020	2021	2020	2020	2020	2021
Very Satisfied	64%	59%	71%	74%	69%	70%	73%	56%
Satisfied	32%	35%	26%	24%	28%	27%	24%	40%

SATISFACTION RATINGS: CUSTOMER SERVICE

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2020	2021	2020	2021	2020	2021	2020	2021
Very Satisfied	61%	54%	64%	63%	63%	62%	56%	51%
Satisfied	31%	35%	29%	29%	30%	31%	36%	38%

SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

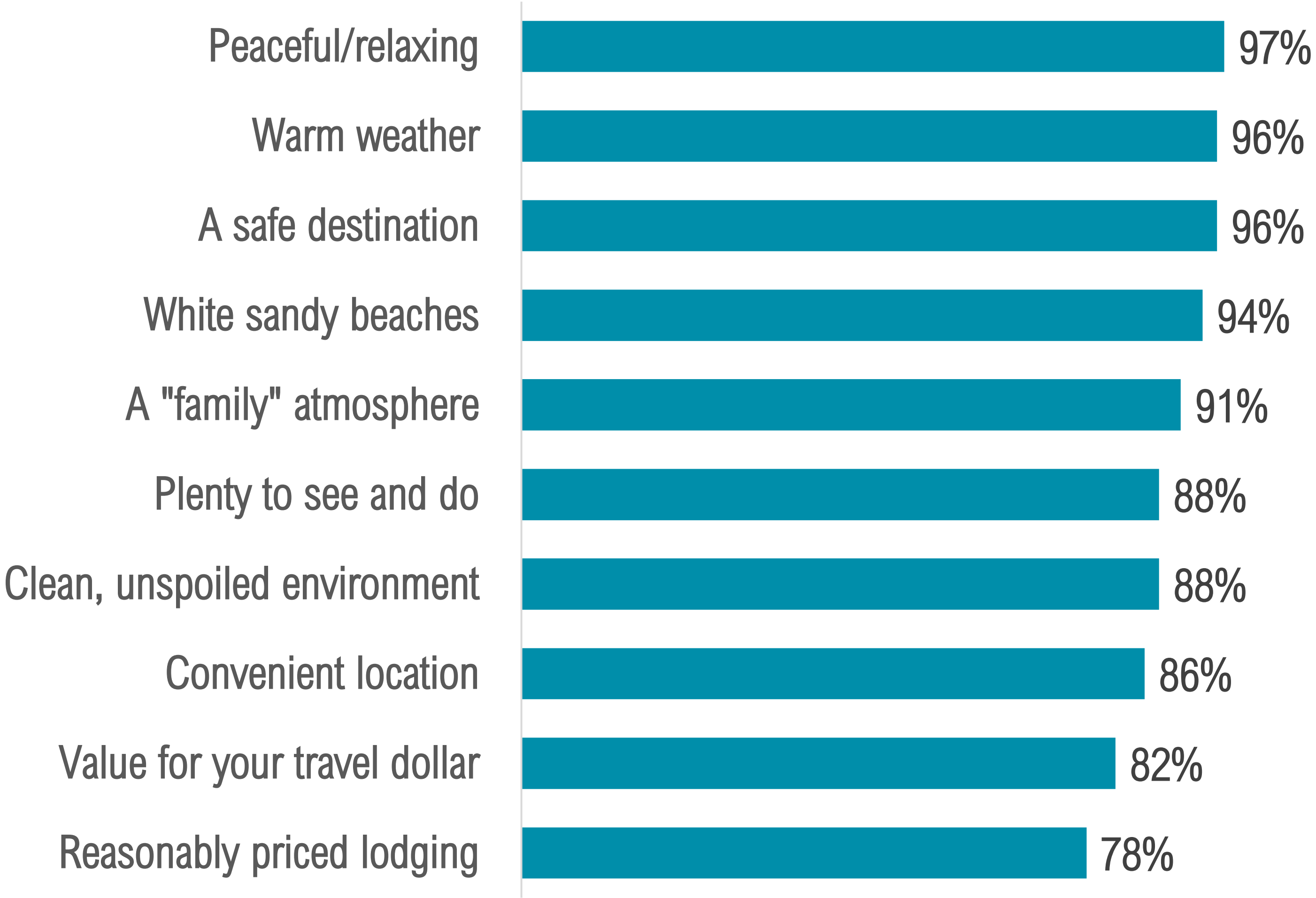


SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2020	2021	2020	2021	2020	2021	2020	2021
Exceeded Expectations	45%	40%	40%	43%	41%	41%	35%	37%
Met Expectations	51%	55%	57%	54%	56%	55%	61%	56%
Did Not Meet Expectations	4%	5%	2%	4%	3%	4%	4%	7%

ATTRIBUTE RATINGS[1]

96% or more of visitors gave high experience ratings for peace, warm weather, and safety in the Fort Myers area.



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

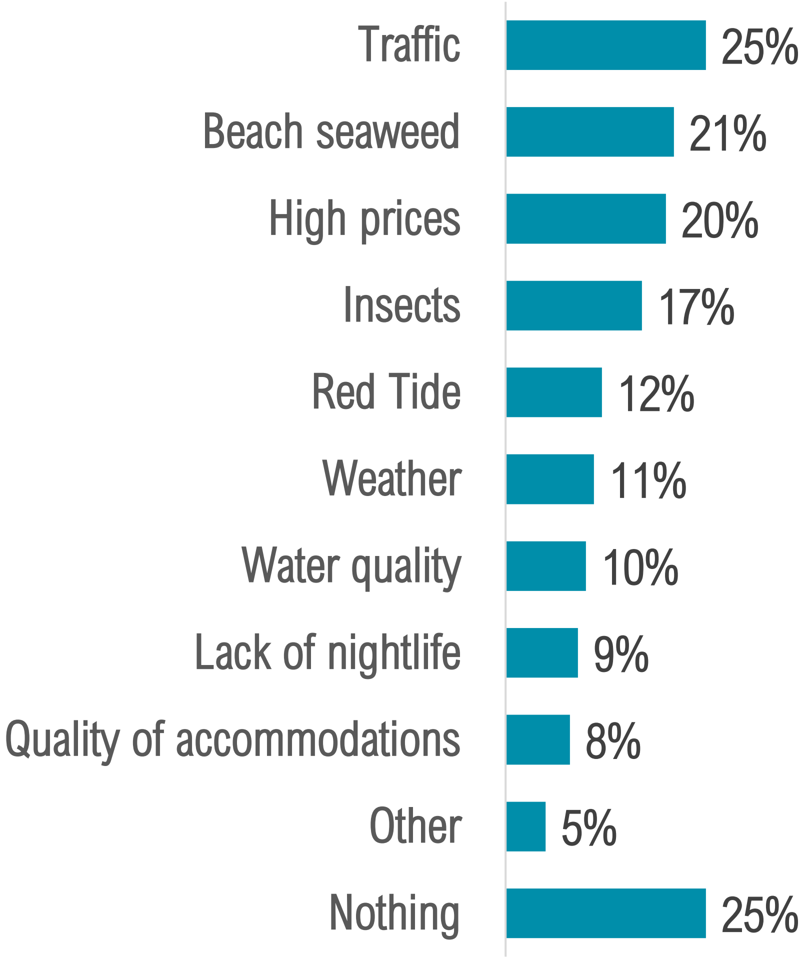
VACATION ATTRIBUTE INFLUENCE VS. RATINGS

Vacation Influencers[1]	Attribute	Fort Myers Area Ratings[2]	GAP %[3]
92%	Warm weather	96%	+4%
92%	Peaceful/relaxing	97%	+5%
89%	A safe destination	96%	+7%
87%	White sandy beaches	94%	+7%
86%	Clean, unspoiled environment	88%	+2%
81%	Convenient location	86%	+5%
80%	Plenty to see and do	88%	+8%
77%	A "family" atmosphere	91%	+14%
76%	Value for your travel dollar	82%	+6%
74%	Reasonably priced lodging	78%	+4%

[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.
[3]Gap is the difference between rating of Fort Myers area ratings and score or Vacation Influencers. A positive GAP is preferred.

VISITOR CONCERNS[1]

1 in 4 visitors were concerned about **traffic**, and nearly 1 in 5 were concerned about **seaweed and high prices**.



[1]Multiple responses permitted.

AREA DESCRIPTIONS[1]

Visitors describe the Fort Myers area as a **wonderful place to visit** with **beautiful beaches** and **warm weather**.

[1]Coded verbatim responses; multiple responses permitted.

AREA DESCRIPTIONS

Wonderful Place to Visit

- “A wonderful vacation destination is tropical atmosphere, great weather, and plenty to see and do.”
- “Perfect vacation; my favorite getaway.”
- “One of the best vacations we have ever taken. Great weather, a tropical environment, and a safe and secure place to visit.”
- “Came for a guys weekend away. Great golfing and beaches. Had a great time.”

Beautiful Beaches

- “Nice vacation with gorgeous beaches, sunsets, restaurants, and happy hours. Great boating and jet skis and kayaking.”
- “A slice of paradise: beautiful, unspoiled, clean absolutely wonderful!”
- “The beaches here are calmer than the east coast. It's very relaxing.”
- “The beaches of Fort Myers and Sanibel are pretty. They are clean and easy to access. I wish there was more parking.”

AREA DESCRIPTIONS

Warm Weather

- “Water was warm, and the weather was fantastic in October!”
- “It’s beautiful, warm and relaxing. People are great and welcoming. A real family place.”
- “The warm weather is refreshing from the long winter.”
- “Wonderful place that is peaceful, has warm weather, wonderful shelling, swimming, biking and resting. We often take a day or two to head to Lover's Key and to Marco Island for a shelling trip.”

Peaceful & Relaxing

- “Quiet beach town with beautiful beaches and great shelling. I love the laid-back feel and was truly able to disconnect and relax.”
- “Quiet, relaxing, beautiful and sometimes great shelling, great restaurants, beautiful flowers and plants. Perfect place for unwinding.”
- “Listening to the waves splash against the shore is life breathing.”
- “Beautiful and relaxing vacation spot. Spent great time with family and friends while enjoying amazing weather and so much wildlife.”

Year-Over-Year Comparisons

ECONOMIC IMPACT

Visitor & Lodging Statistics	2020	2021	% Change
Visitors	3,391,700	4,687,500	+38.2%
Room Nights	4,413,800	6,394,800	+44.9%
Direct Expenditures	$2,631,887,000	$3,729,946,900	+41.7%
Total Economic Impact	$4,274,184,500	$5,945,535,400	+39.1%
Occupancy	52.9%	69.5%	+31.4%
ADR	$144.75	$158.51	+9.5%
RevPAR	$76.57	$110.16	+43.9%
TDT	$37,400,615	$57,528,841	+53.8%

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM

	2020	2021	% Change
Direct Jobs	35,060	50,133	+43.0%
Total Jobs[1]	49,006	69,174	+41.2%
Direct Wages	$790,077,400	$1,122,994,700	+42.1%
Total Wages[1]	$1,324,423,200	$1,844,217,000	+39.2%
Direct Local Taxes	$80,755,000	$113,763,300	+40.9%
Total Local Taxes[1]	$145,481,400	$200,959,100	+38.1%
Direct State Taxes	$185,745,200	$265,199,200	+42.8%
Total State Taxes[1]	$278,544,800	$389,432,400	+39.8%

[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	2020	2021
Visitors in Paid Accommodations	70%	73%
Visitors in Non-Paid Accommodations	27%	24%
Day Trippers	3%	3%

PRE-VISIT

Planned trip in advance	2020	2021
1 week or less	5%	5%
2-4 weeks	13%	12%
1-2 months	27%	31%
3-6 months	27%	31%
6 months or more	24%	20%
Not sure	4%	1%

Considered Other Destinations	2020	2021
Yes	16%	26%
No	84%	74%

PRE-VISIT

Trip Planning Websites[1]	2020	2021
Airbnb, VRBO, HomeAway	18%	28%
Airline websites	28%	26%
Search engines	25%	26%
Booking websites/apps	19%	19%
Vacation rental websites	16%	18%
Trip Advisor	17%	17%
Hotel websites	20%	16%
Travel reviews, blogs, stories, etc.	9%	13%
VCB Social Media	11%	9%
VisitFortMyers.com	11%	8%
Visit Florida	10%	7%
Facebook	10%	7%
Instagram	6%	4%
YouTube, Hulu, Pandora	6%	4%
Other	5%	5%
None/Don't visit websites	16%	17%

[1]Multiple responses permitted.

PRE-VISIT

Information Requests[1]	2020	2021
Call hotel/motel/condo	24%	26%
Call local Chamber of Commerce	9%	10%
Visitor guide	14%	9%
Call VCB	10%	5%
Fort Myers-Sanibel E-newsletter	12%	4%
Other	4%	3%
None/Did not request info	58%	63%

[1]Multiple responses permitted.

PRE-VISIT

Reason for Visiting	2020	2021
Vacation	45%	57%
Beach	43%	53%
Relax and unwind	42%	43%
Visiting friends or relatives	22%	18%
Nature, environment, bird watching	10%	9%
Water sports	7%	8%
Fishing	8%	7%
Special occasion	6%	6%
Biking, hiking, etc.	6%	5%
Shopping	6%	4%
Golf or tennis	6%	4%
Photography	5%	4%
Special event	4%	3%
Attractions	6%	3%
Sporting events	5%	2%
Business conference/meeting	3%	2%
Culture	5%	2%
Museums, history	4%	2%
Diving/snorkeling	4%	2%
Guided tours	3%	2%
Volunteering	2%	1%
Other	5%	5%

PRE-VISIT

Recall of Lee County Promotions	2020	2021
Yes	38%	38%
No	47%	47%
Can't recall	15%	15%

Characteristics influencing decision to visit Lee County (top 2 boxes)	2020	2021
Warm weather	90%	92%
Peaceful/relaxing	92%	92%
A safe destination	88%	89%
White sandy beaches	85%	87%
Clean, unspoiled environment	86%	86%
Convenient location	82%	81%
Plenty to see and do	79%	80%
A "family" atmosphere	75%	77%
Value for your travel dollar	75%	76%
Reasonably priced lodging	72%	74%

PRE-VISIT

Transportation	2020	2021
Fly	64%	76%
Drive a personal vehicle	30%	20%
Drive a rental vehicle	3%	2%
Drive a RV	2%	1%
Travel by bus	0%	1%
Other	1%	0%

Airport Used	2020	2021
Southwest Florida International	80%	82%
Punta Gorda	9%	8%
Ft. Lauderdale international	4%	3%
Miami International	3%	2%
Tampa International	2%	2%
Orlando International	2%	2%
Other	1%	1%

TRAVEL PARTY PROFILE

Visitor Origin	2020	2021
Florida	10%	6%
Southeast	16%	19%
Northeast	19%	17%
Midwest	42%	44%
West	7%	8%
Canada	3%	3%
United Kingdom	1%	<1%
Germany	1%	1%
Other Europe	<1%	1%
Other international	<1%	1%

Visitor Origin	2020	2021
Chicago	4%	6%
New York City	6%	5%
Minneapolis	4%	5%
Detroit	4%	4%
Columbus, OH	1%	4%
Atlanta	2%	4%
Cleveland	2%	3%

TRAVEL PARTY PROFILE

Travel Parties	2020	2021
Mean travel party size	3.4[1]	3.5[1]
Travel with children under age 18	29%	38%

Travel Party Composition	2020	2021
Family	38%	47%
Couple	39%	33%
Group of couples/friends	10%	11%
Single	8%	7%
With business associates	3%	1%
In a tour group	2%	1%

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

TRAVEL PARTY PROFILE

Marital Status	2020	2021
Married	74%	74%
Single	23%	24%
Other	3%	2%

Age	2020	2021
Average age	51	50

Household Income	2020	2021
Median Income	$109,700	$105,950

ACCOMMODATIONS

Lodging Accommodations	2020	2021
Condo/Vacation rental	32%	41%
Hotel/Motel/Resort/B&B	36%	30%
Non-paid accommodations	27%	24%
Day tripper	3%	3%
RV Park/Campground	2%	2%

TRIP EXPERIENCE

Length of Stay	2020	2021
Average nights in the Fort Myers area[1]	8.5	6.9

First time/Repeat Visitors	2020	2021
First-time	24%	32%
Repeat	76%	68%

[1]Source: Includes all types of visitors

TRIP EXPERIENCE

Activities[1]	2020	2021
Beaches	67%	74%
Relax & unwind	59%	69%
Dining	51%	55%
Shopping	34%	37%
Visiting friends/relatives	29%	30%
Nature, environment, bird watching	27%	30%
Water sports	19%	29%
Fishing	16%	23%
Biking, hiking etc.	17%	23%
Bars, nightlife	14%	15%
Attractions	15%	13%
Photography	12%	13%
Golf or tennis	11%	10%
Guided tours	8%	8%
Museums, history, etc.	8%	7%
Diving/snorkeling	5%	7%
Special occasion	6%	6%
Culture	8%	6%
Special event	7%	5%
Sporting event	7%	4%
Spas	5%	4%
Business conference or meeting	3%	2%
Volunteering	3%	1%
Other	5%	3%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Attractions[1]	2020	2021
Beaches	67%	75%
Fort Myers Beach Pier	33%	34%
Sanibel Lighthouse	30%	31%
Sanibel Outlets	19%	18%
J.N. Ding Darling National Wildlife Refuge	15%	17%
Periwinkle Place	12%	17%
Edison & Ford Winter Estates	17%	15%
Shell Factory and Nature Park	11%	12%
Miromar Outlets Mall	15%	11%
Bell Tower Shops	10%	11%
Gulf Coast Town Center	8%	10%
Coconut Point Mall	10%	10%
Bailey-Matthews Shell Museum	5%	8%
Manatee Park	8%	5%
Barbara B. Mann Performing Arts Hall	3%	2%
Broadway Palm Dinner Theater	4%	2%
Other	4%	5%
None	7%	7%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Area stayed	2020	2021
Sanibel Island	23%	29%
Fort Myers Beach	22%	26%
Fort Myers	18%	13%
Cape Coral	14%	13%
Bonita Springs	6%	5%
Captiva Island	3%	4%
Estero	4%	2%
Lehigh Acres	1%	1%
North Fort Myers	3%	1%
Pine Island	1%	1%
Boca Grande/Outer Island	1%	1%
Along I-75	2%	1%
None/not staying overnight	3%	3%

POST-TRIP EVALUATION

Loyalty metrics	2020	2021
Likely to recommend	94%	96%
Likely to return	93%	89%
Likely to return next year	68%	59%

Satisfaction with Accommodations	2020	2021
Exceeded expectations	41%	41%
Met expectations	57%	55%
Did not meet expectations	3%	4%

POST-TRIP EVALUATION

Satisfaction with Visit	2020	2021
Very satisfied	69%	69%
Satisfied	28%	28%
Neither	1%	2%
Dissatisfied/Very dissatisfied	1%	1%
Don't know	1%	0%

Satisfaction with Customer Service	2020	2021
Very satisfied	64%	63%
Satisfied	30%	30%
Neither	3%	4%
Dissatisfied/Very dissatisfied	1%	2%
Don't know	2%	1%

POST-TRIP EVALUATION

Visitor Concerns[1]	2020	2021
Traffic	33%	25%
Beach seaweed	14%	21%
High prices	17%	20%
Insects	23%	17%
Red Tide	10%	12%
Weather	11%	11%
Water quality	12%	10%
Lack of nightlife	10%	9%
Quality of accommodations	9%	8%
Other	4%	5%
Nothing	24%	25%

[1]Multiple responses permitted.

Quarterly Comparisons

ECONOMIC IMPACT

Visitor & Lodging Statistics	January – March	April – June	July – September	October – December
Visitors	913,800	1,309,300	1,162,800	1,301,600
Room Nights	1,554,500	1,766,300	1,294,000	1,780,000
Direct Expenditures	$1,006,613,000	$996,169,300	$767,613,500	$959,551,100
Total Economic Impact	$1,604,541,100	$1,587,893,900	$1,223,575,900	$1,529,524,500
Occupancy	78.8%	74.8%	56.0%	68.7%
ADR	$181.23	$160.77	$139.36	$152.67
RevPAR	$142.81	$120.33	$77.76	$104.88

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM

	January – March	April – June	July – September	October – December
Direct Jobs	13,530	13,389	10,317	12,897
Total Jobs[1]	18,571	18,738	14,162	17,703
Direct Wages	$303,066,300	$299,921,900	$231,109,400	$288,897,100
Total Wages[1]	$497,704,900	$492,541,200	$379,535,100	$474,435,800
Direct Local Taxes	$30,701,700	$30,383,100	$23,412,200	$29,266,300
Total Local Taxes[1]	$54,233,500	$53,670,800	$41,356,900	$51,697,900
Direct State Taxes	$71,570,200	$70,827,600	$54,577,300	$68,224,100
Total State Taxes[1]	$105,097,400	$104,007,000	$80,144,200	$100,183,800

[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	69%	72%	74%	75%
Visitors in Non-Paid Accommodations	29%	24%	24%	22%
Day Trippers	2%	4%	2%	3%

PRE-VISIT

Planned trip in advance	January – March	April – June	July –September	October – December
1 week or less	5%	4%	6%	4%
2-4 weeks	17%	13%	9%	10%
1-2 months	29%	31%	35%	28%
3-6 months	24%	32%	34%	32%
6 months or more	23%	20%	17%	22%
Not sure	2%	0%	0%	4%

Considered Other Destinations	January – March	April – June	July – September	October – December
Yes	21%	25%	36%	22%
No	79%	75%	64%	78%

PRE-VISIT

Trip Planning Websites[1]	January – March	April – June	July – September	October – December
Airline websites/apps	28%	26%	22%	29%
Search engines	27%	30%	20%	28%
Airbnb, VRBO, HomeAway	27%	32%	30%	22%
Vacation rental websites/apps	21%	21%	15%	16%
Hotel websites/apps	18%	16%	15%	17%
Booking websites/apps	18%	21%	20%	16%
Trip Advisor	17%	18%	15%	17%
Travel reviews, blogs, stories	11%	13%	16%	11%
VisitFortMyers.com	10%	8%	8%	7%
Visit Florida	9%	8%	5%	8%
Facebook	8%	8%	7%	7%
VCB social media	8%	11%	8%	8%
YouTube, Hulu, Pandora	6%	5%	3%	4%
Instagram	5%	6%	3%	3%
Other	5%	4%	5%	7%
None/Don't visit websites	17%	16%	16%	20%

[1]Multiple responses permitted.

PRE-VISIT

Information Requests[1]	January – March	April – June	July –September	October – December
Call hotel/motel/condo	26%	26%	30%	23%
Visitor guide	16%	8%	8%	7%
Call VCB	12%	4%	2%	3%
Fort Myers-Sanibel E-newsletter	11%	3%	1%	4%
Call local Chamber of Commerce	11%	26%	1%	3%
Other	4%	2%	3%	3%
None	58%	63%	63%	67%

[1]Multiple responses permitted.

PRE-VISIT

Recall of Lee County Promotions	January – March	April – June	July –September	October – December
Yes	35%	41%	42%	33%
No	52%	44%	44%	50%
Can't recall	13%	15%	14%	17%

Characteristics influencing decision to visit Lee County (top 2 boxes)	January – March	April – June	July –September	October – December
Warm weather	95%	92%	88%	92%
Peaceful/relaxing	91%	95%	92%	91%
A safe destination	86%	91%	91%	87%
Clean, unspoiled environment	84%	86%	87%	85%
White sandy beaches	86%	89%	87%	84%
Convenient location	79%	83%	82%	78%
Plenty to see and do	79%	81%	82%	77%
Value for your travel dollar	70%	78%	80%	75%
A "family" atmosphere	74%	80%	80%	72%
Reasonably priced lodging	67%	78%	77%	72%

PRE-VISIT

Transportation	January – March	April – June	July – September	October – December
Fly	74%	77%	75%	75%
Drive a personal vehicle	21%	19%	21%	20%
Drive a rental vehicle	3%	2%	2%	3%
Drive a RV	1%	1%	1%	1%
Travel by bus	0%	1%	1%	0%
Other	1%	0%	0%	1%

Airport Used	January – March	April – June	July – September	October – December
Southwest Florida International	76%	81%	85%	83%
Punta Gorda	2%	3%	3%	2%
Ft. Lauderdale international	2%	3%	2%	4%
Miami International	2%	3%	2%	1%
Tampa International	2%	2%	3%	3%
Orlando International	15%	7%	5%	6%
Other	1%	1%	0%	1%

TRAVEL PARTY PROFILE

Visitor Origin	January – March	April – June	July – September	October – December
Florida	4%	6%	10%	5%
Southeast	19%	20%	18%	19%
Northeast	15%	15%	16%	19%
Midwest	51%	44%	41%	41%
West	7%	9%	9%	8%
Canada	2%	2%	4%	4%
United Kingdom	0.2%	0.2%	0.2%	0.6%
Germany	0.5%	0.8%	0.2%	1.5%
Other Europe	0.5%	1%	0.6%	1%
Other International	0.8%	2%	1%	0.9%

TRAVEL PARTY PROFILE

Visitor Origin	January – March	April – June	July – September	October – December
Chicago	8%	5%	7%	4%
New York City	6%	3%	7%	5%
Minneapolis	8%	5%	4%	4%
Detroit	5%	3%	5%	3%
Columbus, OH	6%	5%	3%	2%
Atlanta	4%	3%	3%	4%
Cleveland	5%	2%	4%	3%
Washington DC-Baltimore	4%	3%	2%	3%
Indianapolis	5%	2%	2%	2%
Miami-Ft. Lauderdale	<1%	1%	7%	1%
St Louis	4%	3%	<1%	2%
Dallas-Ft. Worth	2%	3%	3%	1%
Boston	3%	2%	<1%	3%
Milwaukee	4%	2%	<1%	2%
Kansas City	1%	2%	3%	1%
Cincinnati	2%	2%	1%	2%
Green Bay-Appleton, WI	2%	1%	2%	2%
Denver-Aurora-Broomfield, CO	<1%	2%	2%	2%
Jacksonville	2%	2%	2%	1%
Pittsburgh	<1%	1%	3%	2%
Nashville	2%	2%	1%	1%
Grand Rapids	3%	2%	<1%	1%

TRAVEL PARTY PROFILE

Travel Parties	January – March	April – June	July – September	October – December
Mean travel party size[1]	3.6	3.8	3.8	3.0
Travel with children under age 18	35%	39%	49%	30%

Travel Party Composition	January – March	April – June	July – September	October – December
Couple	38%	33%	26%	37%
Family	41%	47%	60%	38%
Single	7%	5%	4%	10%
Group of couples/friends	12%	13%	8%	12%
In a tour group	1%	1%	1%	1%
With business associates	1%	1%	1%	2%

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

TRAVEL PARTY PROFILE

Marital Status	January – March	April – June	July – September	October – December
Married	77%	76%	72%	72%
Single	20%	24%	28%	23%
Other	3%	0%	0%	5%

Age	January – March	April – June	July – September	October – December
Average age	50	50	49	52

Household Income	January – March	April – June	July – September	October – December
Median Income	$96,880	$104,350	$106,250	$110,200

TRIP EXPERIENCE

Length of Stay	January – March	April – June	July – September	October – December
Average nights in the Fort Myers area	8.9	7.2	6.4	5.7

First time/Repeat Visitors	January – March	April – June	July – September	October – December
First-time	27%	30%	40%	29%
Repeat	73%	70%	60%	71%

TRIP EXPERIENCE

Activities[1]	January – March	April – June	July – September	October – December
Beaches	71%	78%	74%	71%
Relax & unwind	64%	70%	74%	67%
Dining	52%	54%	57%	57%
Shopping	35%	38%	36%	38%
Visiting friends/relatives	28%	28%	31%	31%
Nature, environment, bird watching	27%	31%	31%	30%
Biking, hiking etc.	25%	26%	20%	22%
Water sports	25%	31%	36%	23%
Fishing	18%	25%	29%	18%
Attractions	15%	13%	11%	12%
Bars, nightlife	15%	16%	14%	14%
Golf or tennis	15%	9%	7%	10%
Photography	12%	16%	13%	12%
Guided tours	10%	8%	7%	7%
Culture	8%	8%	4%	5%
Museums, history, etc.	8%	9%	5%	7%
Sporting event	7%	3%	1%	4%
Diving/snorkeling	6%	8%	8%	5%
Special event	5%	6%	2%	7%
Spas	5%	4%	5%	4%
Special occasion	4%	5%	5%	8%
Business, conference, meeting	3%	2%	1%	2%
Volunteering	3%	2%	0%	1%
Other	3%	2%	3%	4%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Attractions[1]	January – March	April – June	July – September	October – December
Beaches	71%	78%	74%	76%
Sanibel Lighthouse	32%	32%	31%	31%
Fort Myers Beach Pier	29%	36%	41%	30%
Sanibel Outlets	19%	17%	18%	19%
J.N. Ding Darling National Wildlife Refuge	18%	17%	15%	17%
Edison & Ford Winter Estates	16%	15%	14%	14%
Periwinkle Place	15%	18%	16%	17%
Miromar Outlets Mall	12%	11%	9%	12%
Shell Factory and Nature Park	11%	11%	16%	10%
Gulf Coast Town Center	10%	9%	12%	9%
Bell Tower Shops	10%	10%	16%	10%
Coconut Point Mall	9%	10%	11%	10%
Manatee Park	8%	6%	3%	4%
Bailey-Matthews Shell Museum	7%	9%	9%	8%
Barbara B. Mann Performing Arts Hall	3%	2%	1%	1%
Broadway Palm Dinner Theater	2%	3%	1%	2%
None	5%	7%	8%	8%
Other	5%	4%	5%	5%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Area stayed	January – March	April – June	July – September	October – December
Sanibel Island	28%	29%	27%	31%
Fort Myers Beach	22%	25%	34%	24%
Fort Myers	17%	14%	8%	14%
Cape Coral	15%	11%	13%	13%
Bonita Springs	5%	5%	4%	5%
Captiva Island	3%	4%	5%	4%
Estero	2%	3%	2%	3%
North Fort Myers	2%	1%	1%	1%
Lehigh Acres	1%	1%	1%	1%
Pine Island	1%	1%	1%	0%
Boca Grande/Outer Island	1%	1%	1%	0%
Along I-75	1%	1%	1%	1%
None/not staying overnight	2%	4%	2%	3%

POST-TRIP EVALUATION

Loyalty metrics	January – March	April – June	July – September	October – December
Likely to recommend	95%	96%	96%	95%
Likely to return	91%	89%	89%	89%
Likely to return next year	58%	56%	58%	63%

Satisfaction with Accommodations	January – March	April – June	July – September	October – December
Exceeded expectations	45%	40%	37%	41%
Met expectations	52%	56%	58%	55%
Did not meet expectations	3%	4%	5%	4%

POST-TRIP EVALUATION

Satisfaction with Visit	January – March	April – June	July – September	October – December
Very satisfied	73%	72%	66%	66%
Satisfied	23%	25%	31%	31%
Neither	2%	2%	2%	2%
Dissatisfied/Very dissatisfied	1%	1%	1%	1%
Don't know	1%	0%	0%	0%

Satisfaction with Customer Service	January – March	April – June	July – September	October – December
Very satisfied	69%	65%	61%	59%
Satisfied	25%	28%	34%	33%
Neither	3%	4%	4%	5%
Dissatisfied/Very dissatisfied	1%	3%	1%	1%
Don't know	2%	0%	0%	2%

POST-TRIP EVALUATION

Visitor Concerns[1]	January – March	April – June	July – September	October – December
Traffic	44%	21%	16%	25%
High prices	22%	12%	24%	22%
Red Tide	21%	12%	8%	9%
Insects	14%	7%	25%	22%
Beach seaweed	11%	48%	14%	8%
Water quality	11%	14%	6%	8%
Lack of nightlife	11%	9%	7%	8%
Weather	9%	20%	8%	6%
Quality of accommodations	8%	13%	4%	6%
Nothing	19%	18%	31%	30%
Other	4%	11%	2%	4%

[1]Multiple responses permitted.

Methodology

METHODOLOGY

- Economic Impact of tourism in Lee County is derived from:
  - Visitor Tracking Study
    - Internet survey & in-person interviews in public areas, hotels, & at events around Lee County
    - Sample size: 3,793 completed interviews
    - Target individuals: Calendar Year 2021 visitors to Lee County
    - Data Collection: January 2021 – December 2021
  - Occupancy Study
    - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc., and the STR Report
    - Sample Size – quarterly survey data from 352 properties reporting to DSG, and 86 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

- **3,793** visitor interviews were completed in the following areas:

889	Fort Myers Beach: The Pier, Times Square
1,467	Fort Myers: Centennial Park, RSW, Edison-Ford Winter Estates, Hampton Inn & Suites Fort Myers
816	Sanibel: Lighthouse Beach, Sanibel Moorings Resort
502	Cape Coral/North Fort Myers: Yacht Club Community Park, The Shell Factory and Nature Park
119	Bonita Springs: Bonita Beach

Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

Calendar Year 2021
Visitor Tracking, Occupancy & Economic Impact Study

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