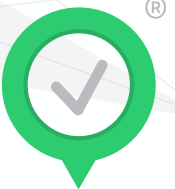




Visitation Trends & Key Insights from 2019 - 2021

Arrivalist



What We Will Cover Today

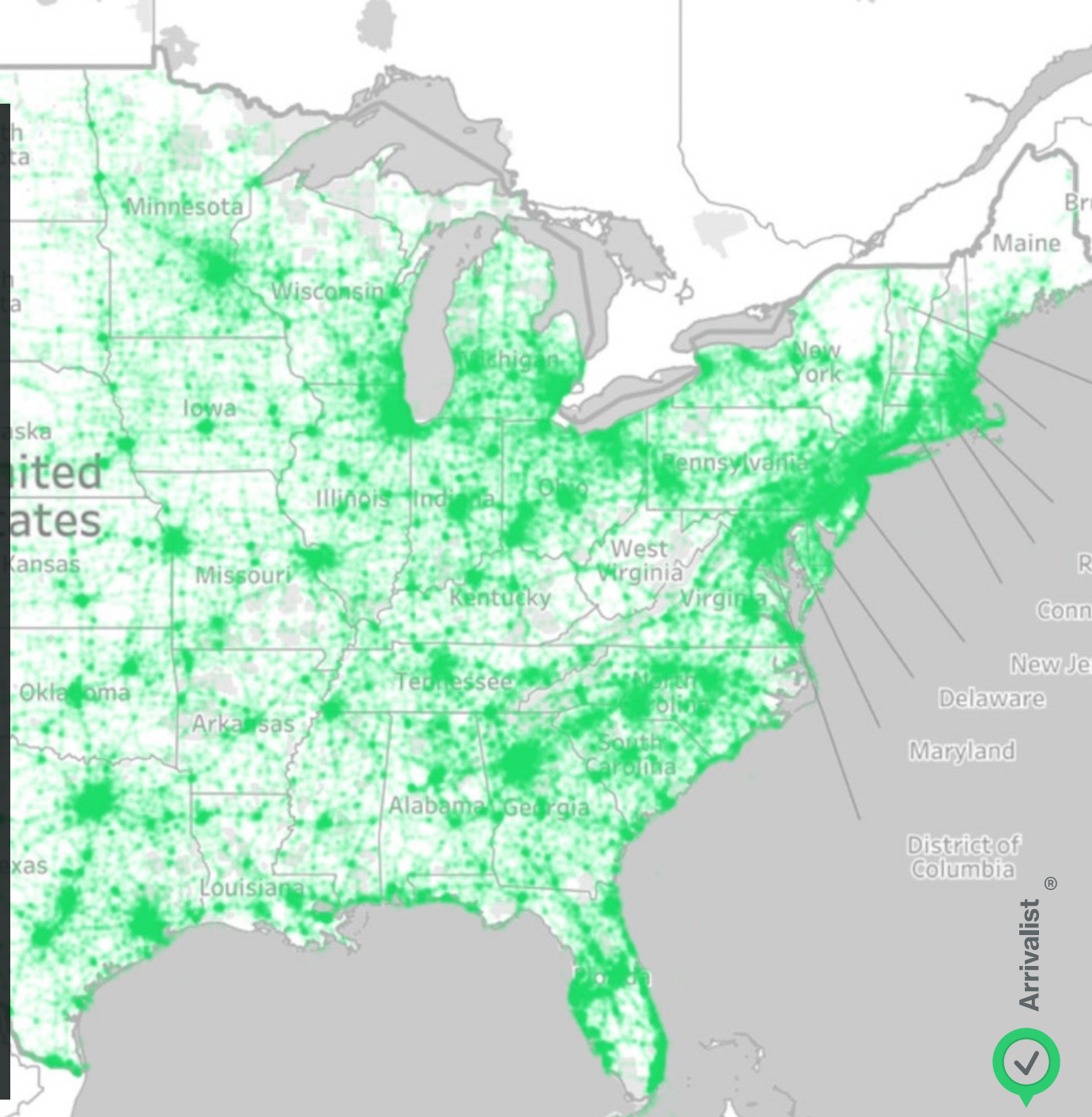
- How Arrivalist Works with the DMO
- Competitive Share in Florida
- YoY Trends in Arrivals to Lee County
- Means of Travel
- What Visitors are Doing in Market
- Your Questions



Arrivalist Calibrated Data



- Anonymized, multi-sourced GPS location data for millions of users, accurate to 30 feet
- Rigorously balanced to be an accurate representation of the US population
- Privacy Law Compliant (CCPA & GDPR)



Location Data Answers Fundamental Questions About Visitation To The Destination You Call Home



From Where?

- Origin State
- Origin DMA
- Origin Zip



How Long?

- Accuracy to the minute
- Unique Days composition
- Time to arrival



How Well?

- Arrival Lift™
- Stay Lift™



To Where?

- City
- Point of Interest



Why?

- Media Exposures
- Event Attendance
- Holidays



Who

- Monthly Demographics



When?

- Day of Arrival
- Seasonality



How?

- Fly
- Drive



What's Included in our 2021 Analysis

+

Included:

- Smartphone panel trips, balanced each month to the US Census and published as Calibrated Data
- US Adult extrapolations
- Trips of 50+ miles from panelists' homes
- Trips of 4+ hours in Lee County
- Round trips, where a visitor returns home
- Connected vehicle panel trips

-

Excluded:

- International visitation
- Children (<18 y/o)
- Non-smartphone users or trips where no smartphone signals picked up for multiple days
- Local trips of less than 50 miles
- Trips of less than 4 hours in Lee County
- One-way trips, like relocations
- Commuters

What We Measured in 2021

492,897 panel trips, projected to **9,861,477**
US adult trips

932,706 panel trips to Points of Interest,
projected to **22,730,788** US adult trips

60,609 Panel Attributed Arrivals*

*Small Subset of All Attributed Arrivals

Did You Know...Lee County Has GAINED Market Share in Florida Overnights Since 2019?

2019 County	2019 Share	2020 County	2020 Share	2021 County	2021 Share
Orange	17.6%	Orange	11.8%	Orange	14.5%
Miami-Dade	7.0%	Bay	5.7%	Miami-Dade	5.6%
Broward	5.4%	Miami-Dade	4.5%	Osceola	5.5%
Osceola	4.9%	Lee	4.4%	Bay	5.0%
Hillsborough	4.9%	Osceola	4.2%	Broward	4.6%
Palm Beach	4.8%	Hillsborough	4.1%	Lee	4.4%
Pinellas	3.7%	Pinellas	4.0%	Hillsborough	4.2%
Lee	3.7%	Broward	3.8%	Pinellas	4.0%
Bay	3.4%	Volusia	3.5%	Palm Beach	3.6%
Duval	3.4%	Palm Beach	3.4%	Monroe	3.3%



Overall Visitation Insights

2021, Jan – Dec Calibrated Data
Independent of Attribution

Arrivalist®



Calendar 2021 Overnight Visitation Profile

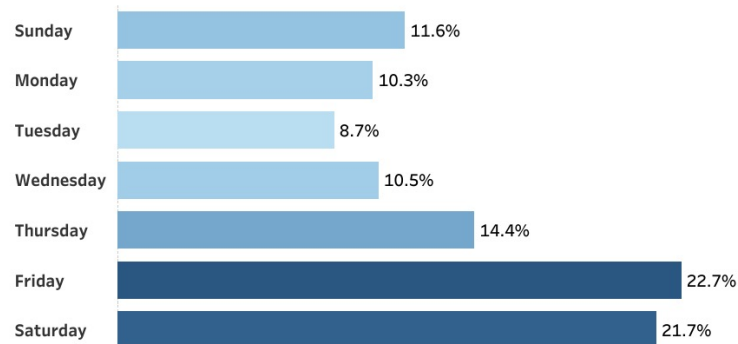
Total est. US Adult Trips

5,652,177

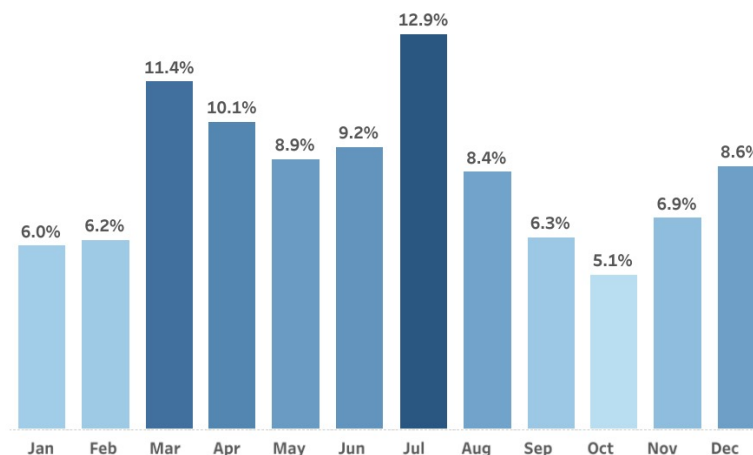
Top Origin Markets (DMAs)

DMA	Trips	Share of Trips	Average Unique Nig..
Miami/Fort Lauderdale	913,502	16.2%	2.3
Tampa/Saint Petersburg	618,799	10.9%	2.1
Orlando/Daytona Beach/Melbourne	321,610	5.7%	2.4
West Palm Beach/Fort Pierce	262,307	4.6%	2.2
Chicago	259,586	4.6%	4.7
New York	247,982	4.4%	4.3
Minneapolis/Saint Paul	194,270	3.4%	5.2
Detroit	143,275	2.5%	5.3
Cleveland	125,063	2.2%	4.8
Philadelphia	122,526	2.2%	4.3
Indianapolis	119,370	2.1%	5.2
Atlanta	111,867	2.0%	4.1
Boston	97,733	1.7%	4.6
Cincinnati	91,808	1.6%	4.7

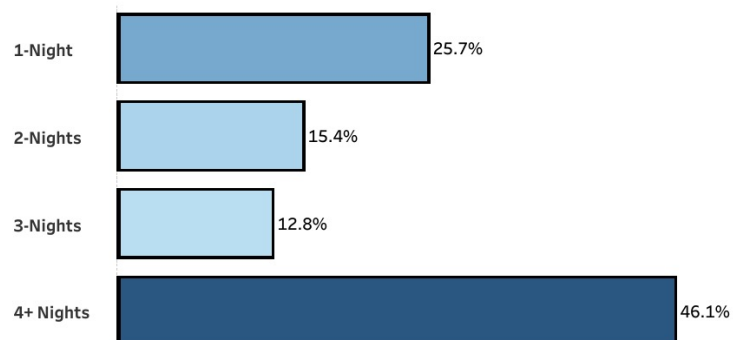
Trips by Day of Week



Trips by Month



Trips by Length of Stay



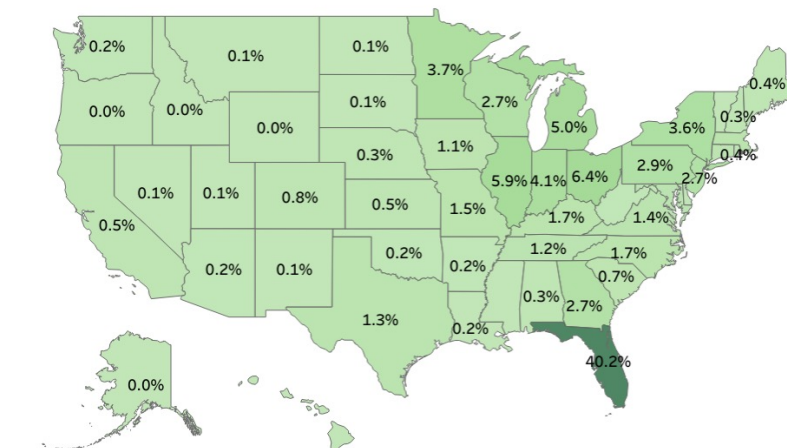
Average Nights

3.8

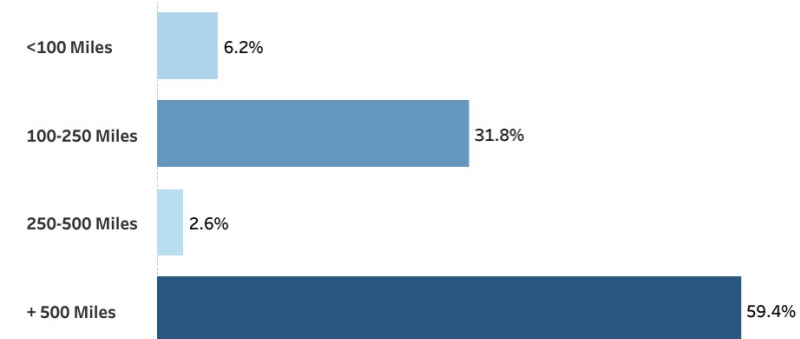
Average Distance Traveled

708.6 Miles

Trips by Origin States



Trips by Avg. Distance Traveled (Miles)



Primary visitors.



Calendar 2021 Overnight, Out of State Visitation

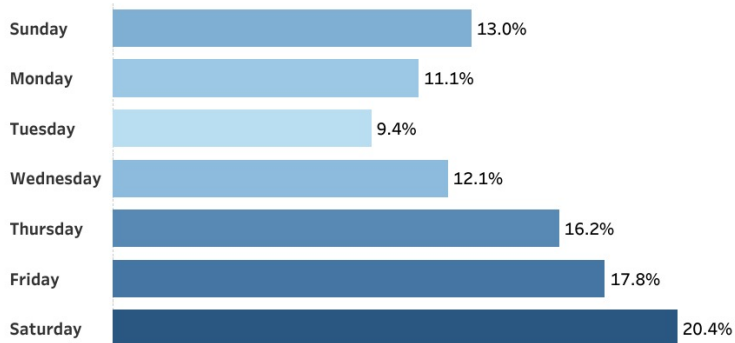
Total est. US Adult Trips

3,378,566

Top Origin Markets (DMAs)

DMA	Trips	Share of Trips	Average Unique Nig..
Chicago	259,586	7.7%	4.7
New York	247,982	7.3%	4.3
Minneapolis/Saint Paul	194,270	5.8%	5.2
Detroit	143,275	4.2%	5.3
Cleveland	125,063	3.7%	4.8
Philadelphia	122,526	3.6%	4.3
Indianapolis	119,370	3.5%	5.2
Atlanta	111,867	3.3%	4.1
Boston	97,733	2.9%	4.6
Cincinnati	91,808	2.7%	4.7
Columbus-Oh	79,716	2.4%	5.0
Milwaukee	70,432	2.1%	5.1
Washington Dc	69,342	2.1%	4.3
Grand Rapids/Kalamazoo/Battle Creek	65,835	1.9%	5.9

Trips by Day of Week

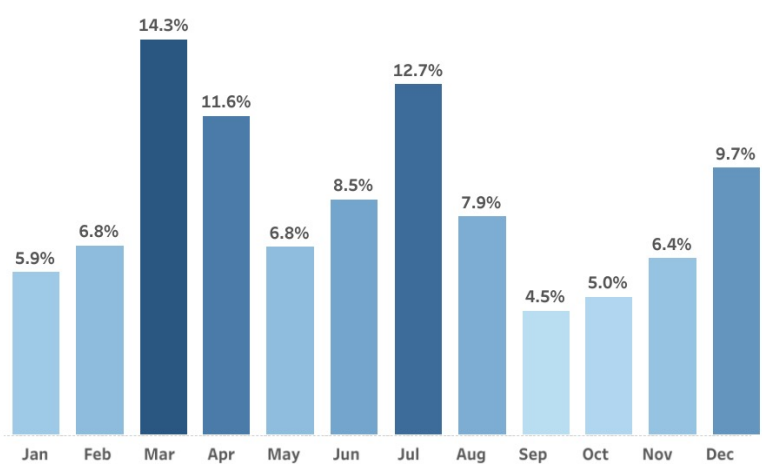


Primary visitors.

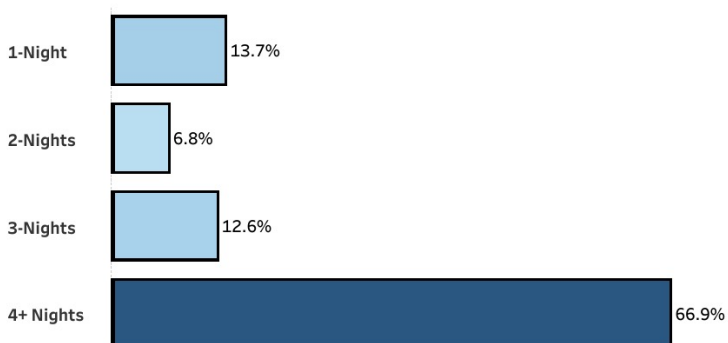
Average Nights

4.8

Trips by Month



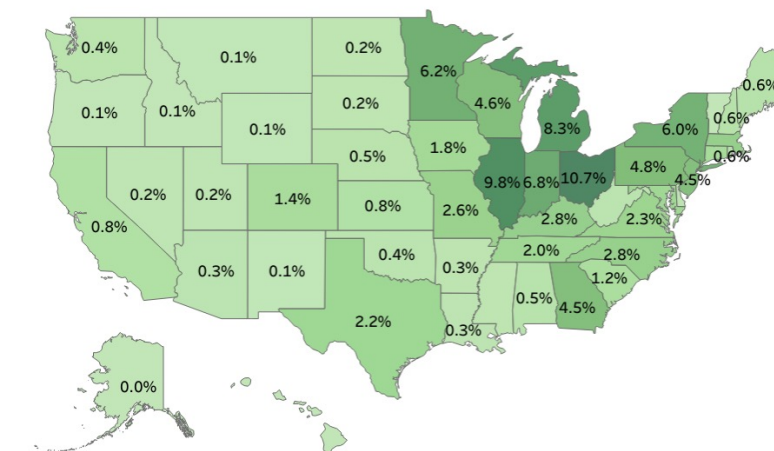
Trips by Length of Stay



Average Distance Traveled

1,087.5 Miles

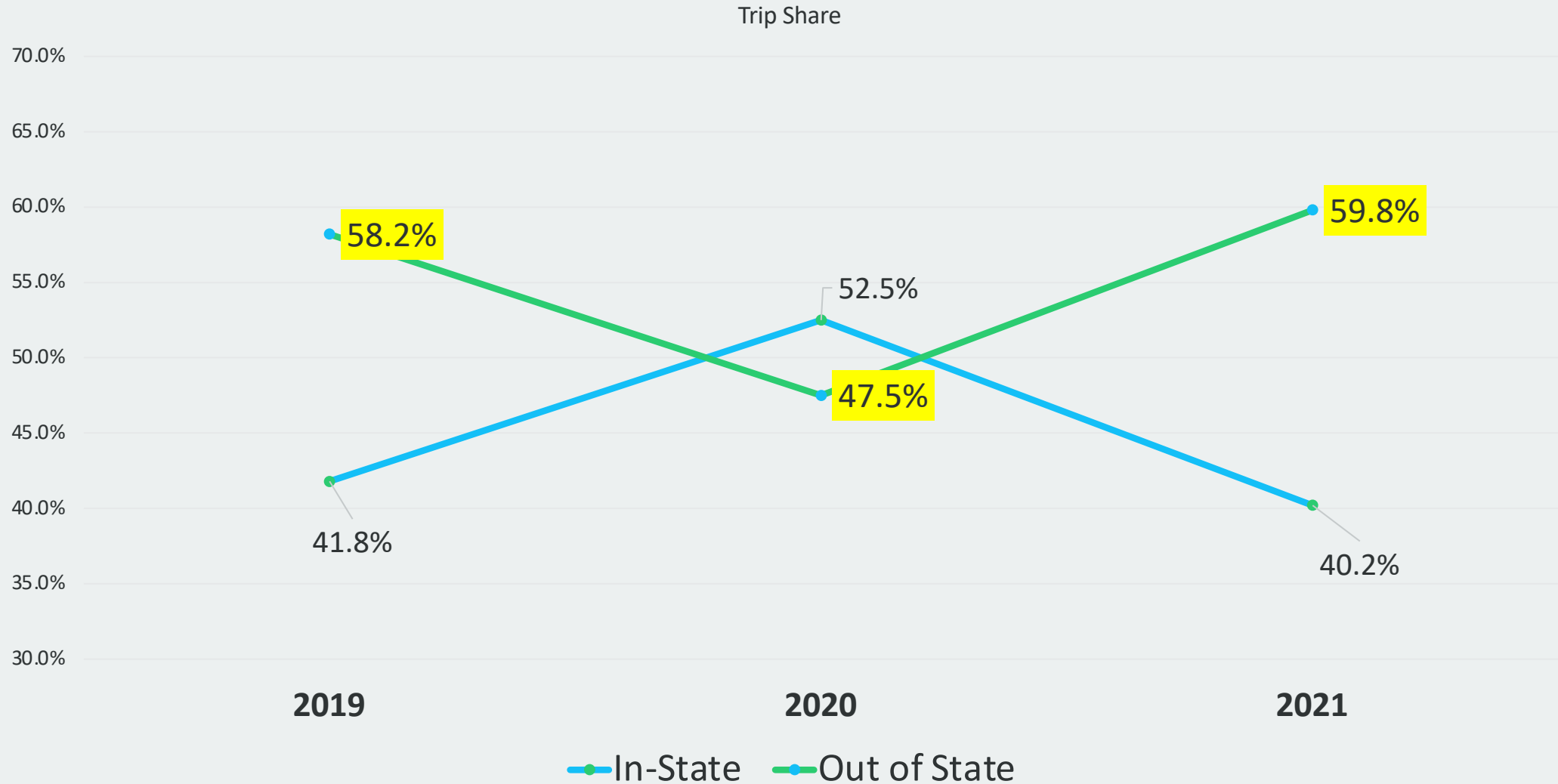
Trips by Origin States



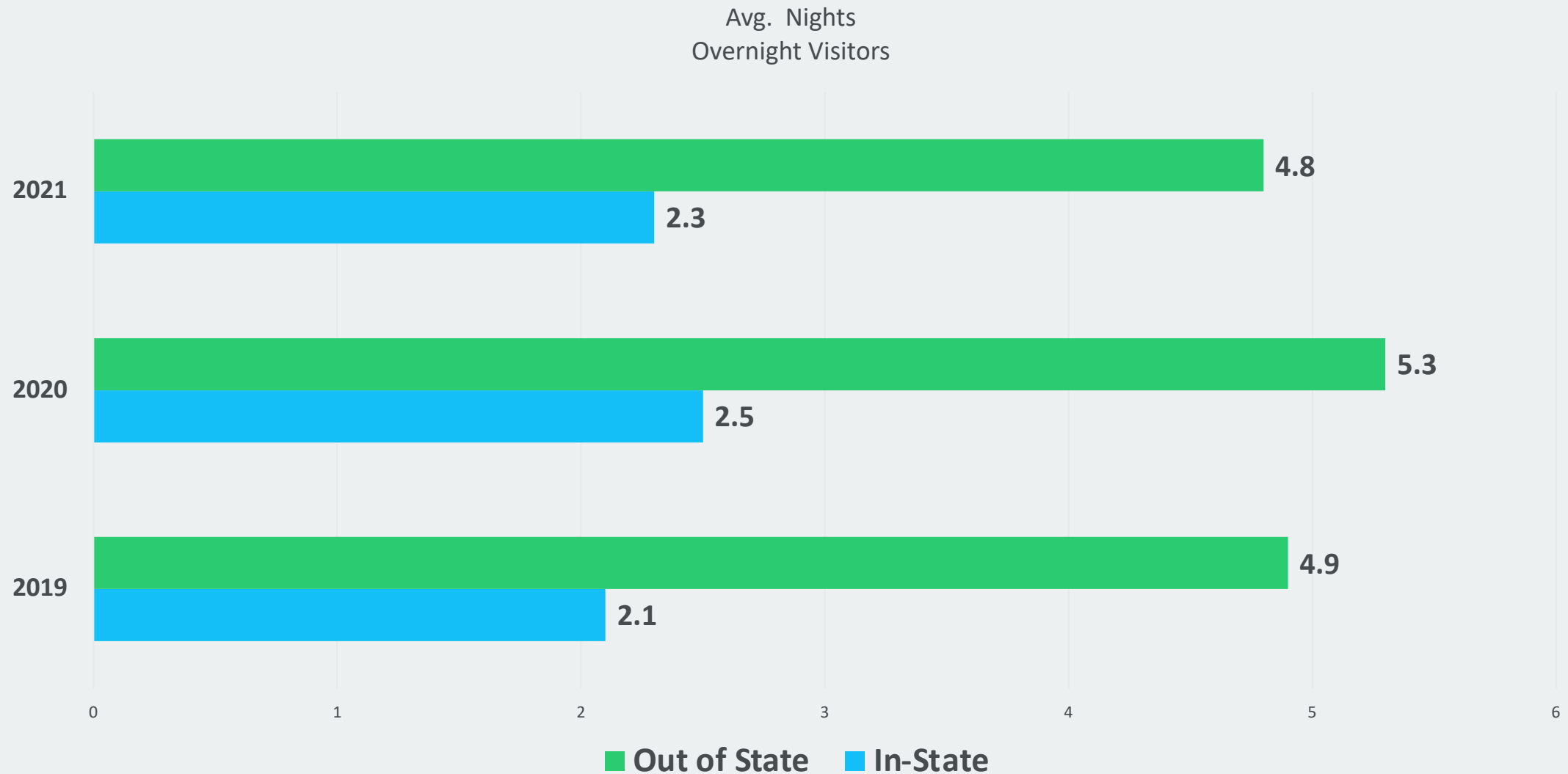
Trips by Avg. Distance Traveled (Miles)



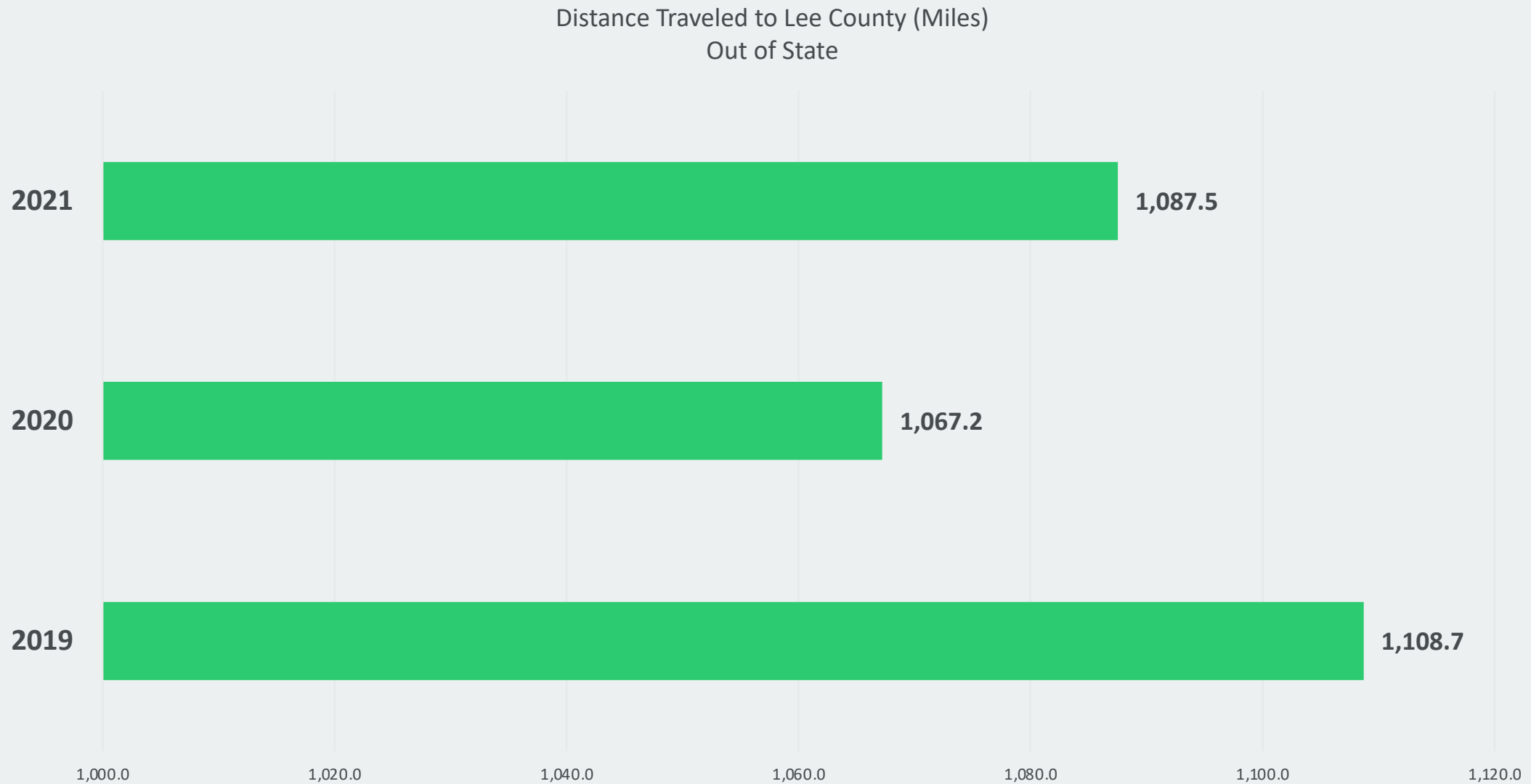
Out of State Visitors Made 6 in 10 Overnight Trips in 2021



Length of Stay Amongst Overnight Guests Nearly Flat with 2019

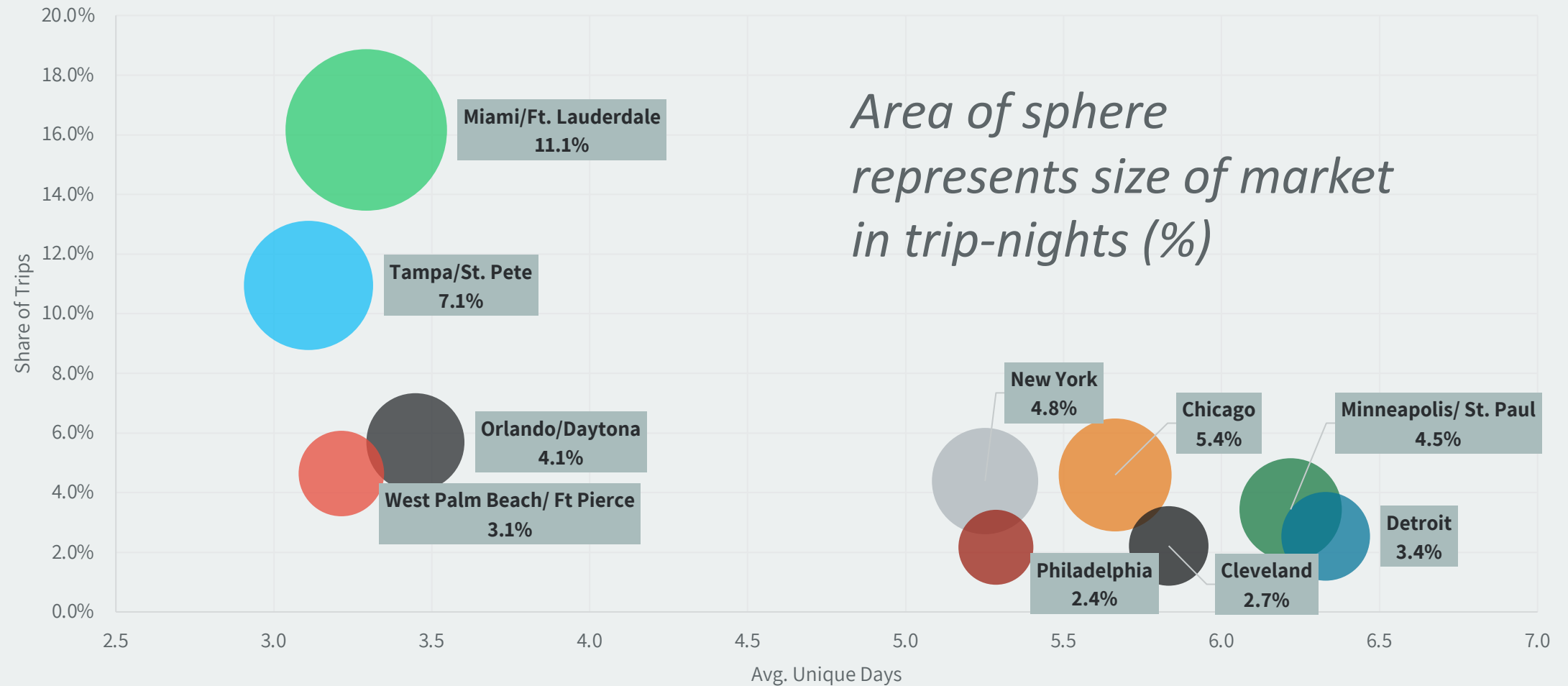


The Destination's Gravitational Force Has Reached 98% of Pre-Pandemic Levels Amongst Out of State Visitors

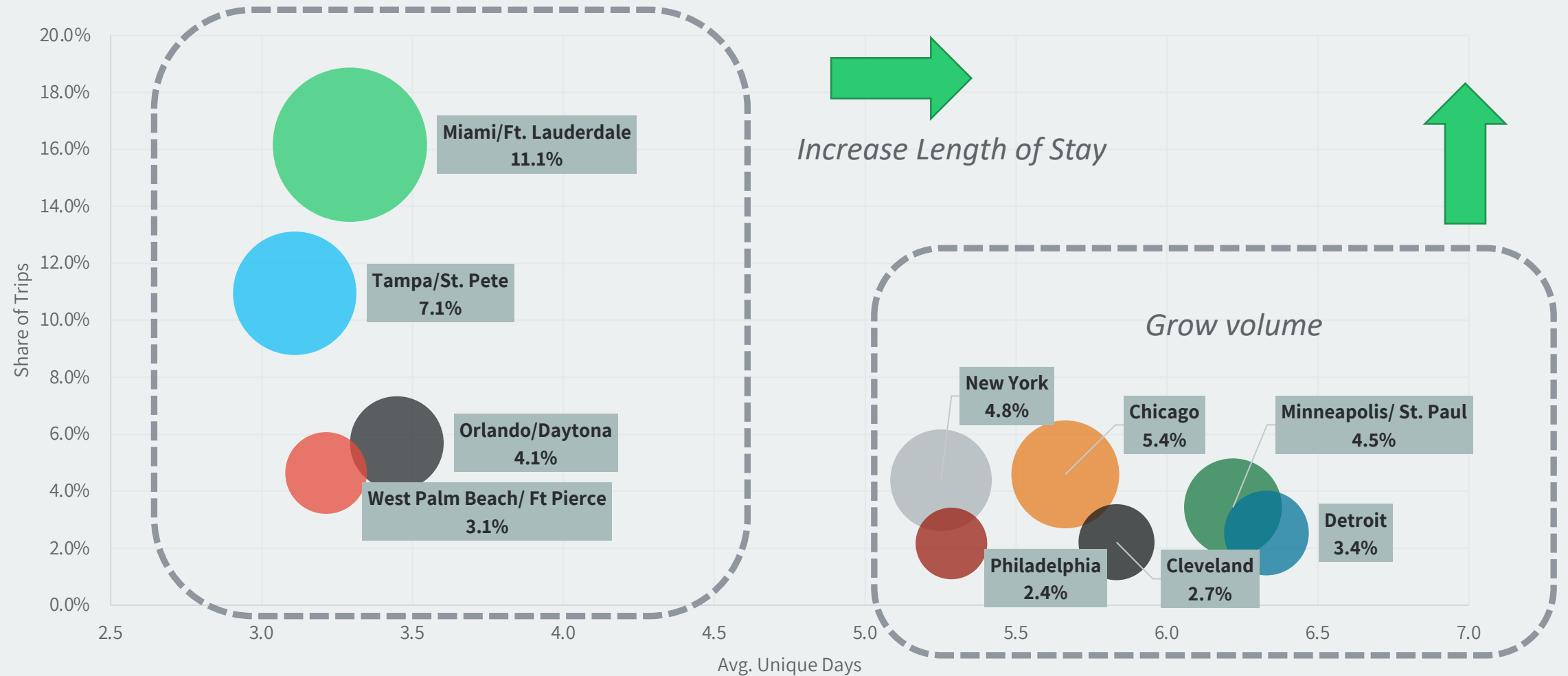


How can we reflect the combination of **volume** and **yield** to better understand key markets?

The Top 10 Markets Have Been Responsible for Just Under Half (49%) of Total Trip Nights in Market



The Top 10 Markets Have Been Responsible for Just Under Half (48%) of Total Trip Nights in Market



Primary, OVERNIGHT visitors. Jan – Dec 2021.



How Visitors Arrived

Arrivalist®



How Arrivalist Measures Method of Travel



- Fly
 - Cross-visitation with a mapped airport (RSW, PGD)
 - Min 1 night in Lee County
 - Agnostic to lodging type
 - Unit of measurement is trips



- Drive
 - Absence of airport trip during Lee County trip (smartphone GPS)
 - Road trips (connected vehicle GPS)

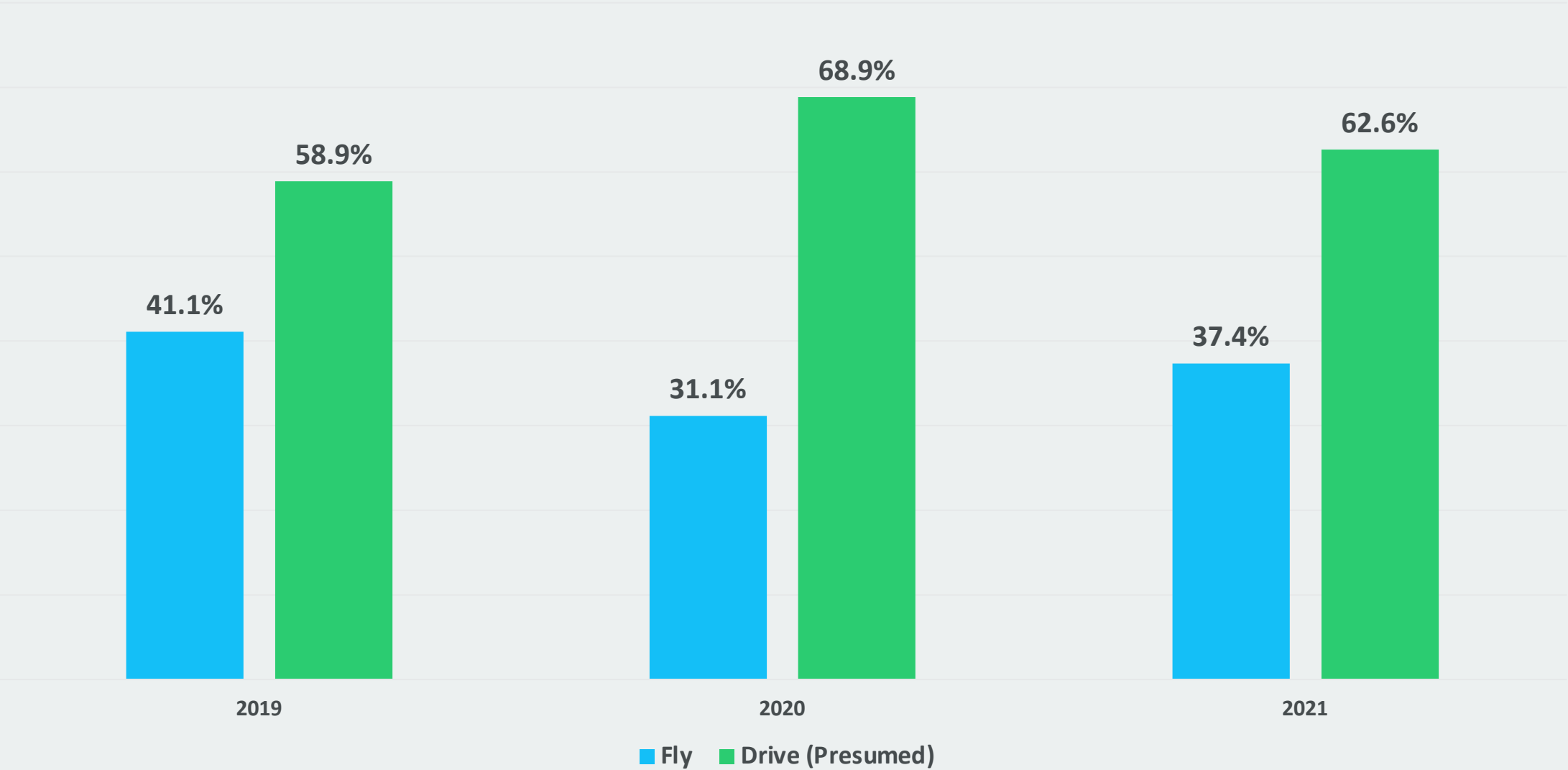
Remember, no intercept, and kids and international excluded.



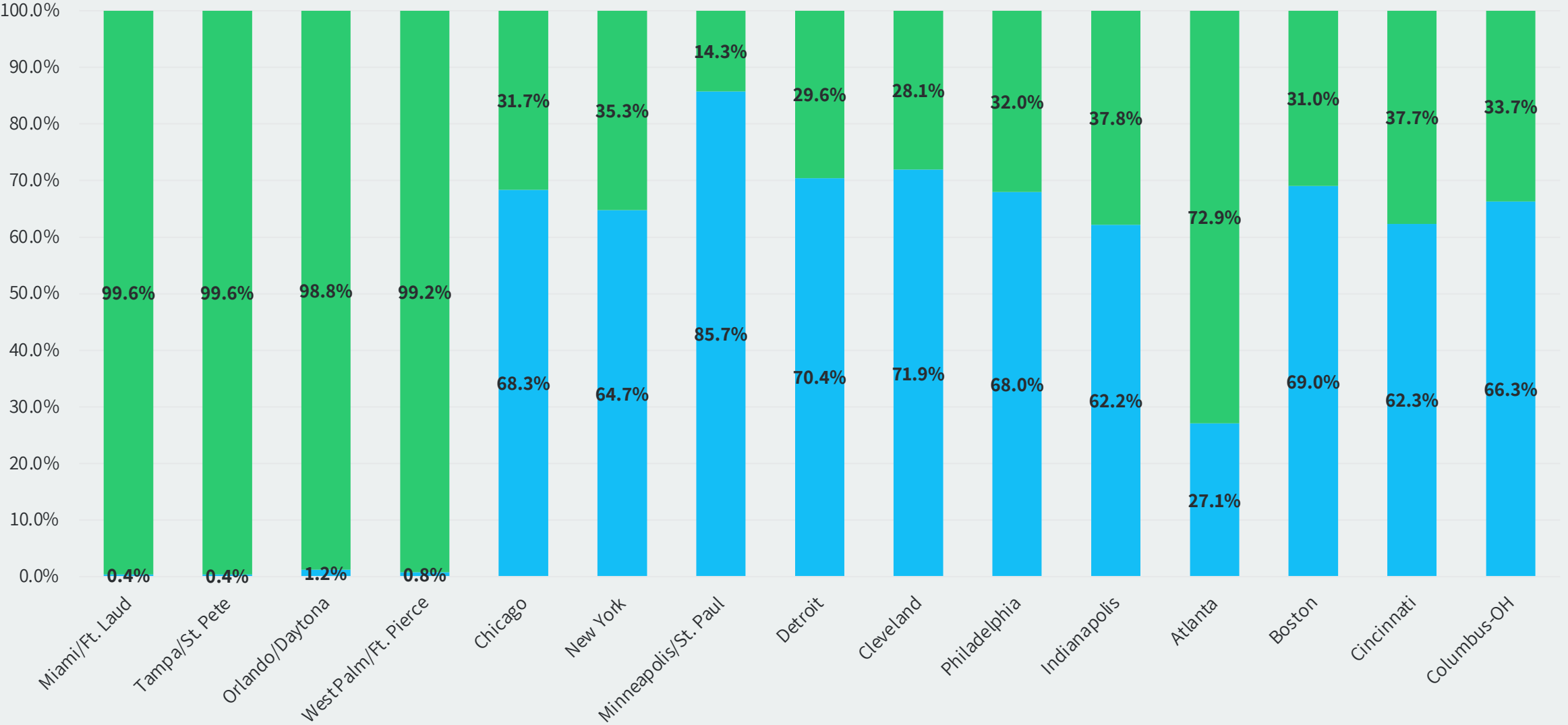
About 4 in 10 Overnight Trips Involve RSW or PGD in 2021



Means of Arrival



While, driving remains a key means of arrival, markets differ significantly in their arrival method.



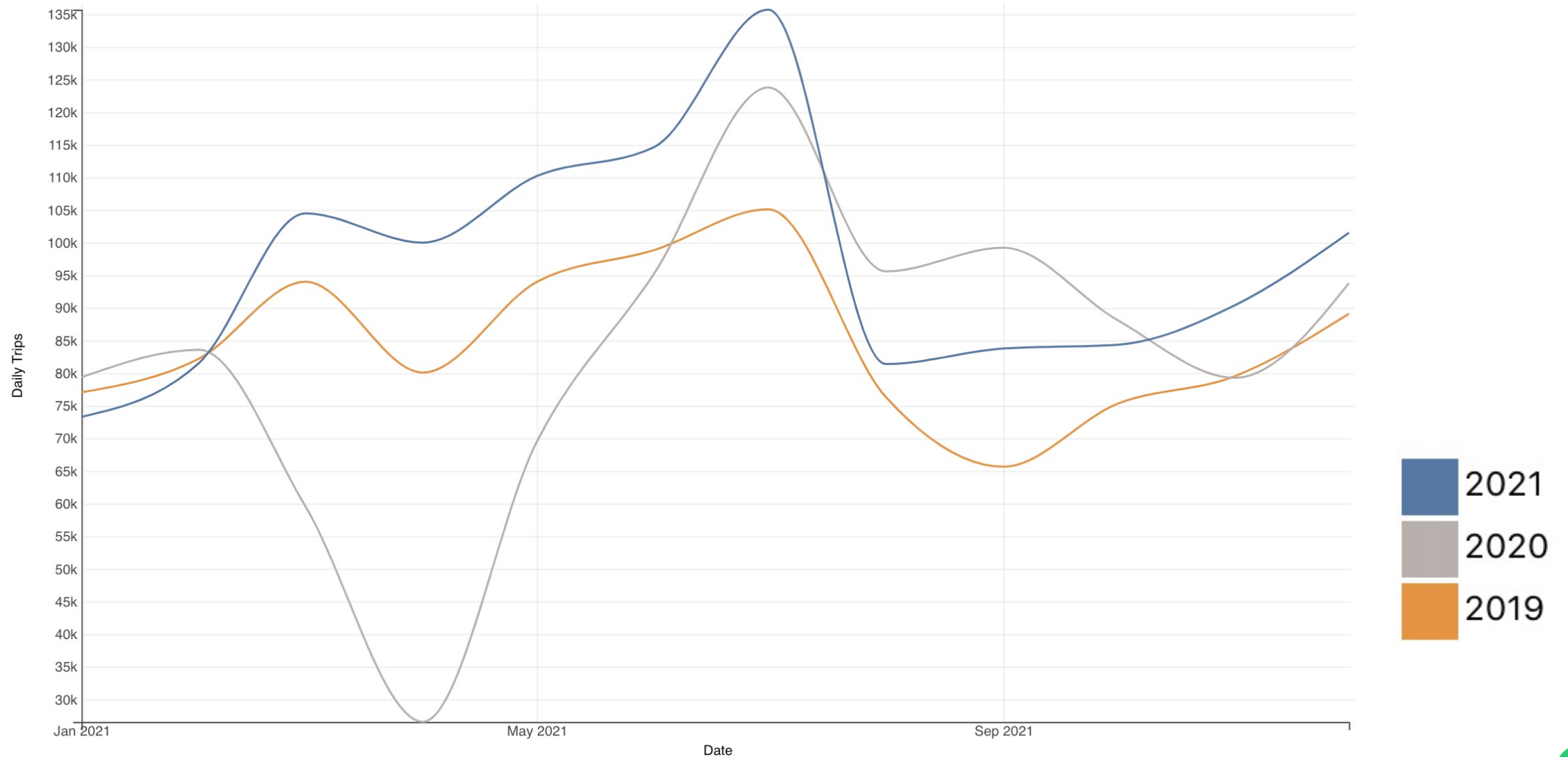
Primary, OVERNIGHT visitors. Jan – Dec 2021. RSW and PGD.

Fly Share Drive Share



Concentrating Just on Drives....

March – December 2021 - Overnight Road Trip Arrivals Exceeded 2019 Levels



In-Market Behavior

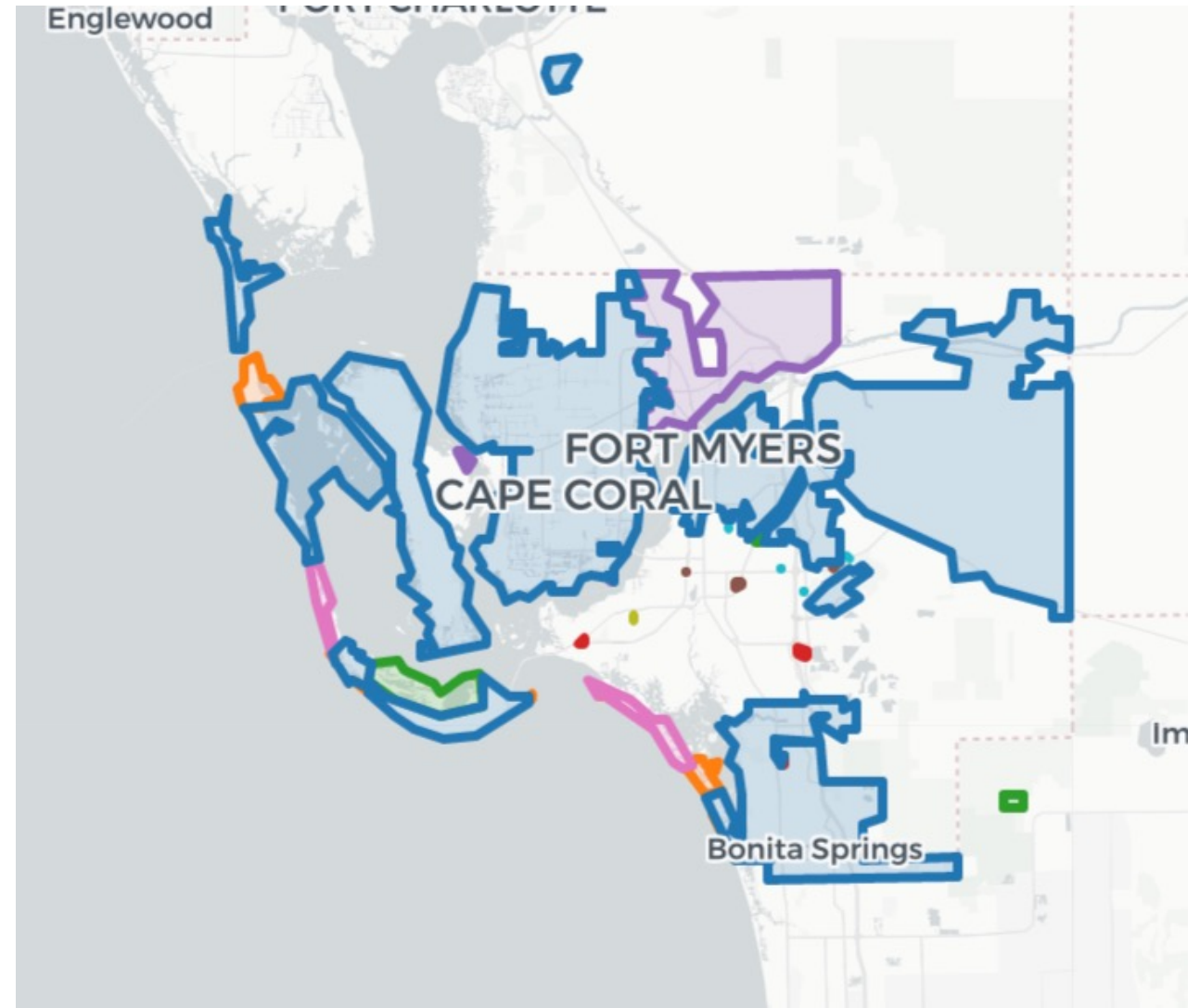
Arrivalist®



Observing 46 Points of Interest in and around Lee County

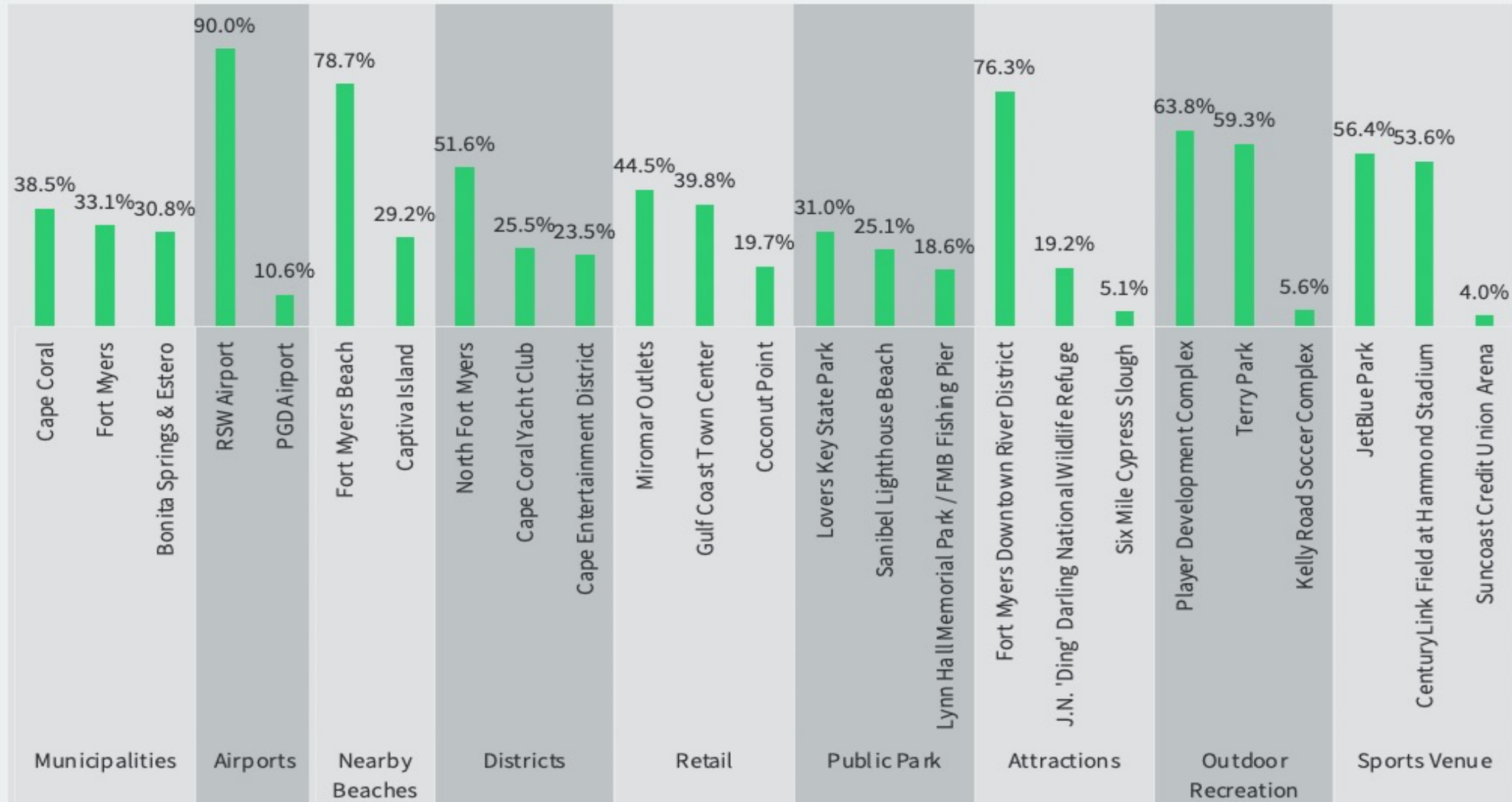
- Airports
- Districts
- Cities
- Beaches
- Retail

Focus on Primary visitors to Lee County.



Top POIs by Category (2021)

Top 3 POI by Category



Visitation Profile | Flyers



Total est. US adult Trips to POI

2,157,313

Average Nights

5.1

Average Distance Traveled

1,132 Miles

Trips by POI

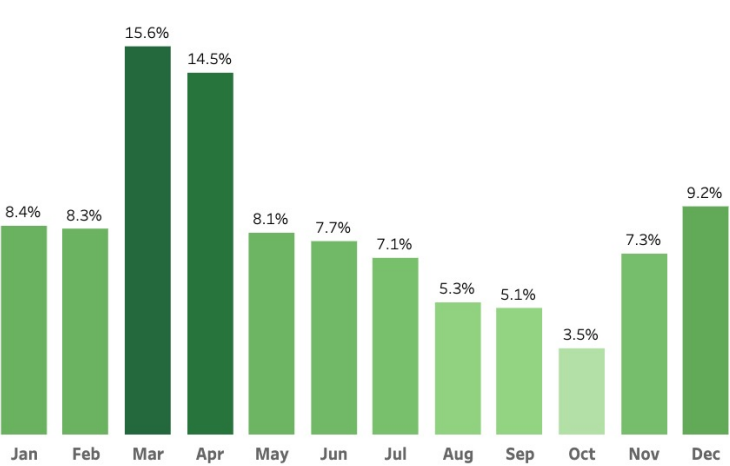
Point of Interest	Trips	Share of Trips	Avg. Time in POI (Hours)
RSW Airport	1,932,638	89.6%	2.4
PGD Airport	224,675	10.4%	1.8



53.0% visit Fort Myers Beach or Captiva Island

25.4% visit public parks

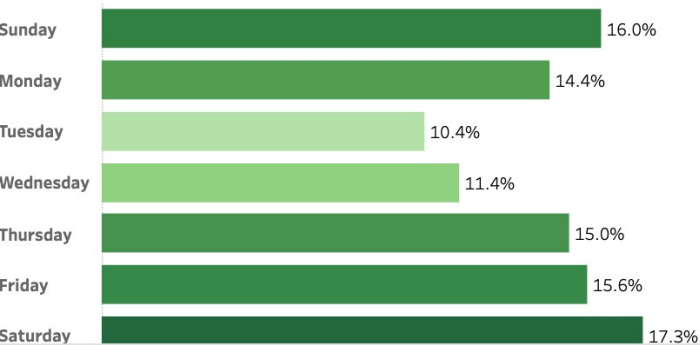
Trips by Month



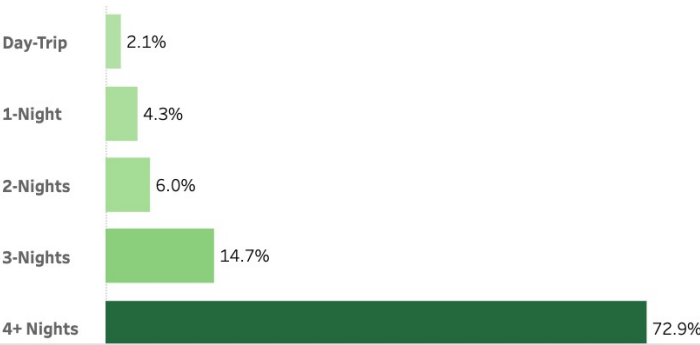
Top Origin Markets(DMA)

DMA	Trips	Share of Trips	Average Unique Nights
Chicago	182,279	8.4%	4.8
Minneapolis/Saint Paul	167,295	7.8%	5.3
New York	165,095	7.7%	4.6
Detroit	102,737	4.8%	5.4
Cleveland	93,073	4.3%	5.2
Philadelphia	84,930	3.9%	4.6
Indianapolis	75,578	3.5%	5.5
Boston	69,169	3.2%	5.1
Cincinnati	59,324	2.7%	4.7
Columbus-Oh	54,666	2.5%	5.2
Milwaukee	52,871	2.5%	5.4
Saint Louis	42,194	2.0%	5.1
Grand Rapids/Kalamazoo/Battle Creek	42,148	2.0%	6.1
Washington Dc	39,666	1.8%	4.4
Denver	31,021	1.5%	5.0

Trips by Day of Week



Trips by Length of Stay



Trips by Avg. Distance(miles)



Primary, domestic visitors outside 50 miles. 2021.



Visitation Profile | Fort Myers Downtown River Dist.



Total est. US adult Trips to POI

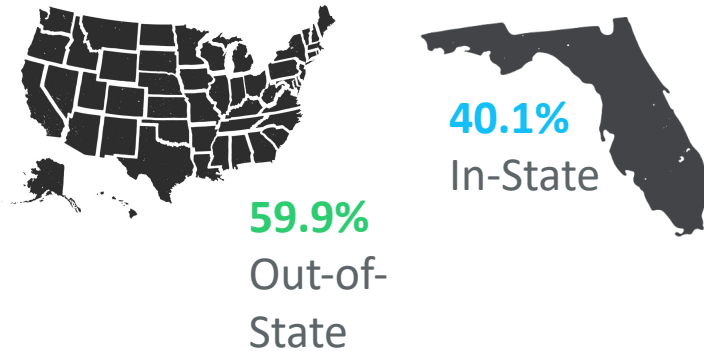
582,953

Average Nights

4.0

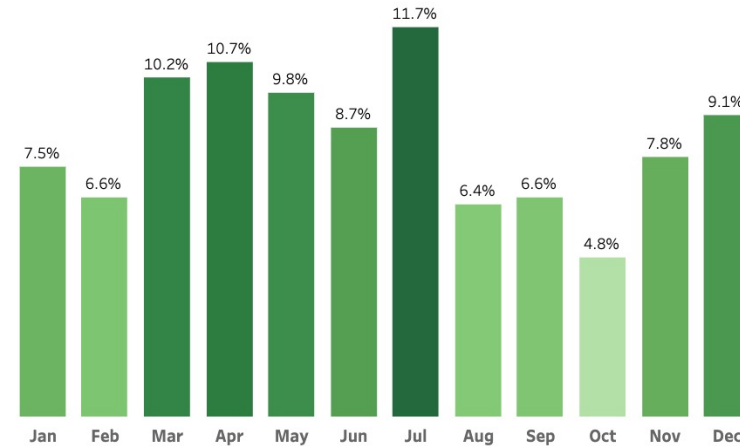
Average Distance Traveled

715.2 Miles



- **24.3%** fly through RSW
- **33.1%** also visit Cape Coral

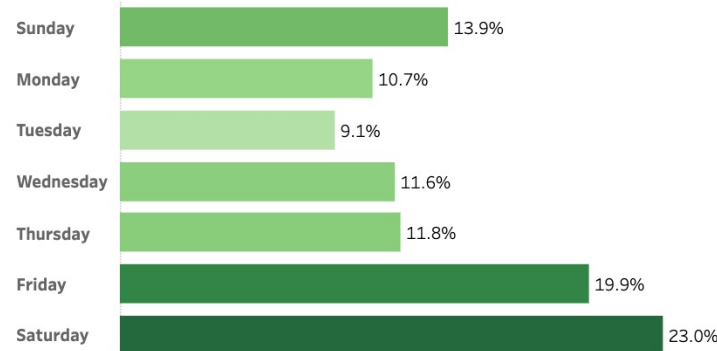
Trips by Month



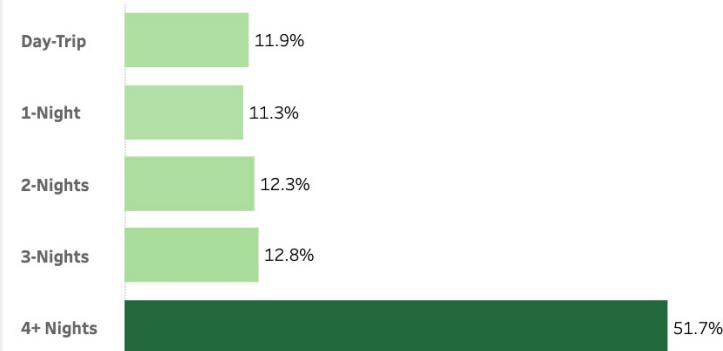
Top Origin Markets(DMA)

DMA	Trips	Share of Trips	Average Unique Nights
Miami/Fort Lauderdale	84,323	14.5%	2.1
Tampa/Saint Petersburg	76,184	13.1%	1.4
Orlando/Daytona Beach/Melbourne	29,434	5.0%	2.6
West Palm Beach/Fort Pierce	28,625	4.9%	2.0
Chicago	26,521	4.5%	5.3
New York	23,936	4.1%	5.0
Detroit	18,949	3.3%	5.6
Minneapolis/Saint Paul	18,515	3.2%	5.3
Philadelphia	16,854	2.9%	4.9
Atlanta	13,866	2.4%	4.3
Cleveland	11,636	2.0%	5.2
Indianapolis	9,093	1.6%	5.7
Columbus-Oh	8,774	1.5%	5.5
Boston	8,524	1.5%	5.0
Milwaukee	8,122	1.4%	5.6

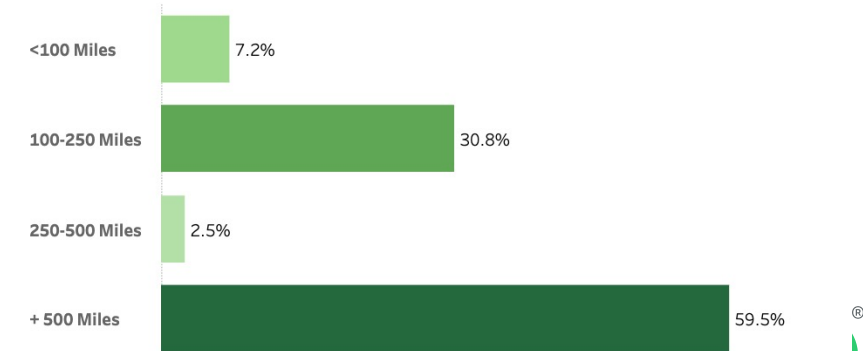
Trips by Day of Week



Trips by Length of Stay



Trips by Avg. Distance(miles)



Primary, domestic visitors outside 50 miles. 2021.



Visitation Profile | Retail



Total est. US adult Trips to POI

1,338,292

Average Nights

4.7

Average Distance Traveled

791.5 Miles

Trips by POI

Point of Interest	Trips	Share of Trips	Avg. Time in POI (Hours)
Miomar Outlets	498,239	37.2%	2.1
Gulf Coast Town Center	445,316	33.3%	1.8
Coconut Point	211,579	15.8%	1.5
Sanibel Outlets	183,158	13.7%	1.4



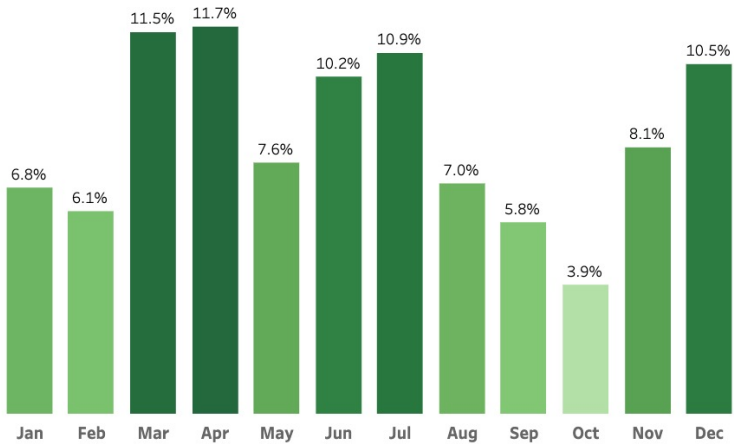
67.6%
Interstate



32.4%
In-State

- 46.2% fly via a mapped airport
- 36.8% go to a mapped beach

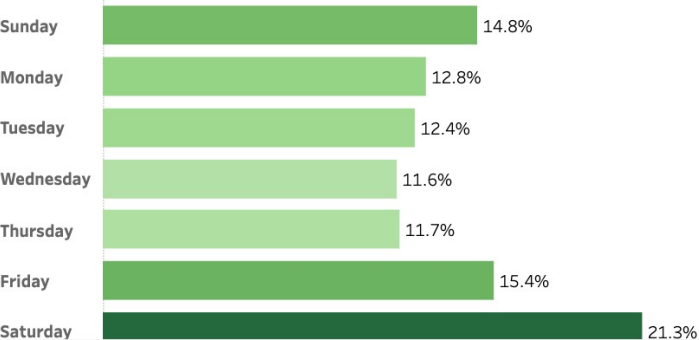
Trips by Month



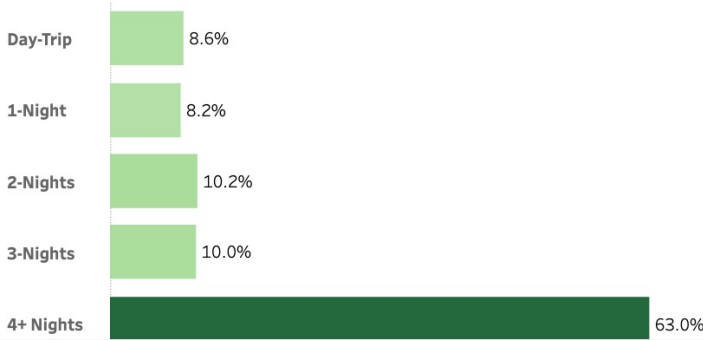
Top Origin Markets(DMA)

DMA	Trips	Share of Trips	Average Unique Nights
Miami/Fort Lauderdale	161,433	12.1%	2.2
Tampa/Saint Petersburg	130,373	9.7%	1.9
New York	67,062	5.0%	5.1
Chicago	61,195	4.6%	5.7
West Palm Beach/Fort Pierce	58,241	4.4%	2.5
Orlando/Daytona Beach/Melbourne	51,692	3.9%	3.0
Detroit	46,367	3.5%	6.1
Cleveland	45,696	3.4%	6.0
Minneapolis/Saint Paul	43,772	3.3%	6.2
Indianapolis	34,231	2.6%	6.0
Philadelphia	30,701	2.3%	5.5
Columbus-Oh	23,709	1.8%	6.3
Boston	22,688	1.7%	5.8
Atlanta	21,375	1.6%	5.0
Cincinnati	20,626	1.5%	5.8

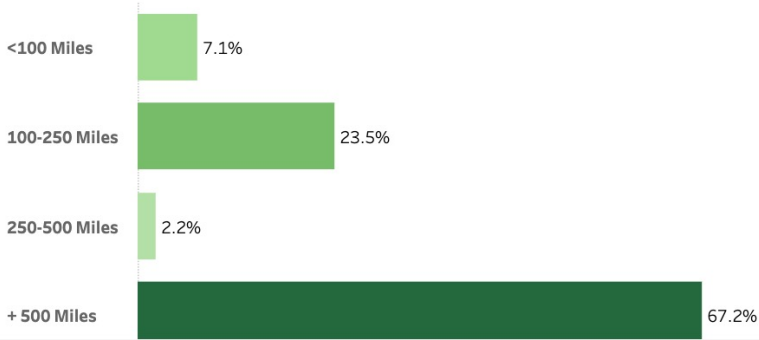
Trips by Day of Week



Trips by Length of Stay



Trips by Avg. Distance(miles)



Primary, domestic visitors outside 50 miles.





Visitation Profile | Fort Myers Beach



Total est. US adult Trips to POI

1,700,609

Average Nights

4.6

Average Distance Traveled

930.1 Miles

Trips by POI

Point of Interest	Trips	Share of Trips	Avg. Time in POI (Hours)
Fort Myers Beach	1,700,609	100.0%	36.6

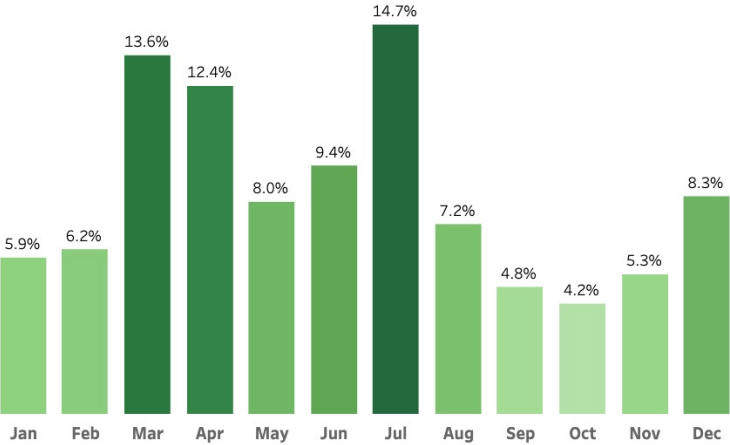


81.4%
Out-of-State



18.6%
In-State

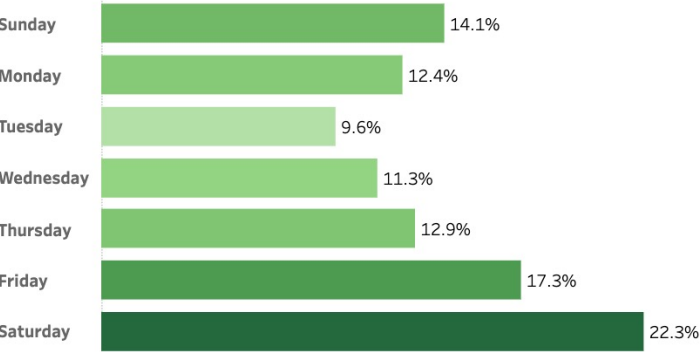
Trips by Month



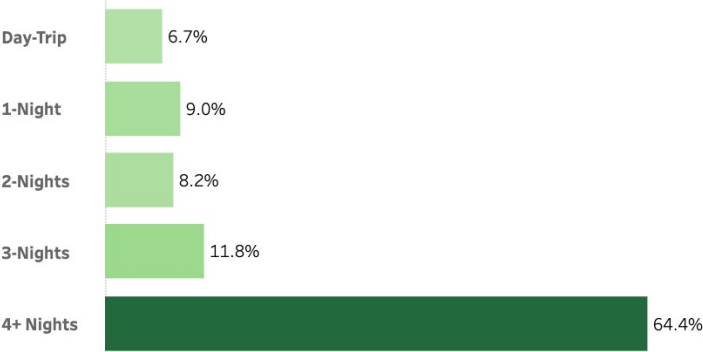
Top Origin Markets(DMA)

DMA	Trips	Share of Trips	Average Unique Nights
Miami/Fort Lauderdale	138,570	8.1%	2.0
Chicago	111,046	6.5%	4.9
Minneapolis/Saint Paul	108,842	6.4%	5.3
Tampa/Saint Petersburg	72,853	4.3%	1.8
Detroit	72,377	4.3%	5.7
Indianapolis	68,140	4.0%	5.3
Cleveland	54,820	3.2%	5.3
New York	53,945	3.2%	4.7
Cincinnati	45,878	2.7%	4.9
Orlando/Daytona Beach/Melbourne	43,122	2.5%	2.6
Milwaukee	38,796	2.3%	5.1
Grand Rapids/Kalamazoo/Battle Creek	38,359	2.3%	6.1
West Palm Beach/Fort Pierce	37,966	2.2%	2.1
Columbus-Oh	36,039	2.1%	5.2
Philadelphia	34,041	2.0%	5.1

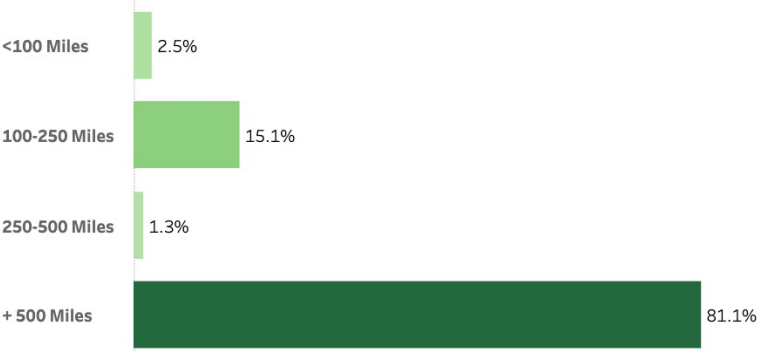
Trips by Day of Week



Trips by Length of Stay



Trips by Avg. Distance(miles)



Primary, domestic visitors outside 50 miles.





Visitation Profile | Captiva Island NEW



Total est. US adult Trips to POI

622,911

Average Nights

4.9

Average Distance Traveled

881.0 Miles

Trips by POI

Point of Interest	Trips	Share of Trips	Avg. Time in POI (Hours)
Captiva Island	622,911	100.0%	26.5

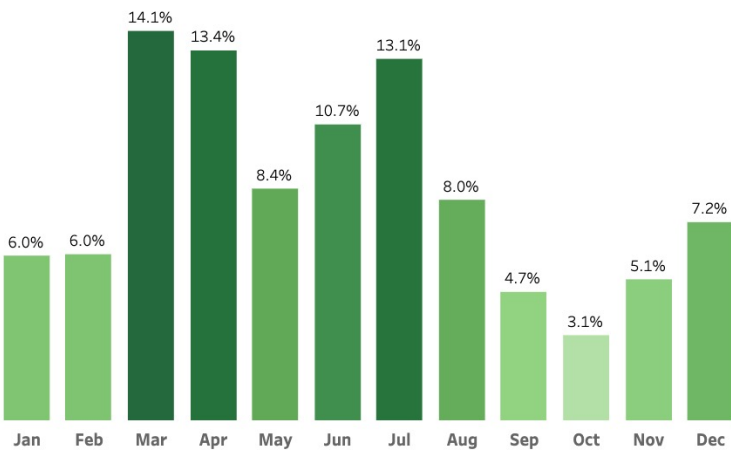


77.5%
Out-of-State



22.5%
In-State

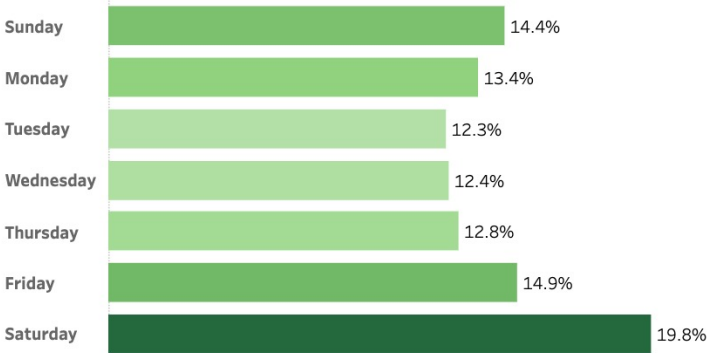
Trips by Month



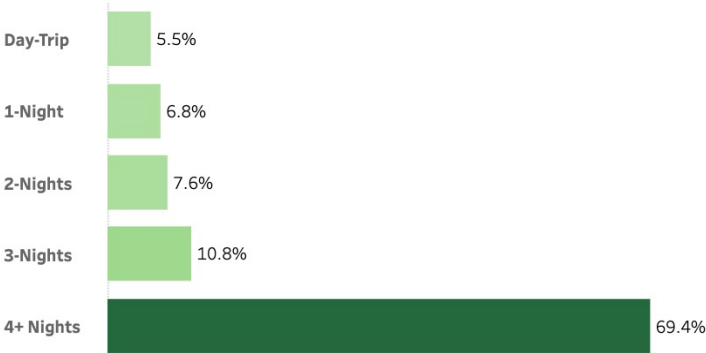
Top Origin Markets(DMA)

DMA	Trips	Share of Trips	Average Unique Nights
Miami/Fort Lauderdale	51,016	8.2%	2.3
Tampa/Saint Petersburg	33,314	5.3%	2.3
New York	32,236	5.2%	4.7
Chicago	31,354	5.0%	5.5
Minneapolis/Saint Paul	31,034	5.0%	5.8
West Palm Beach/Fort Pierce	23,586	3.8%	2.5
Orlando/Daytona Beach/Melbourne	22,379	3.6%	3.3
Boston	21,769	3.5%	5.0
Cleveland	20,581	3.3%	5.4
Indianapolis	17,164	2.8%	5.9
Philadelphia	15,580	2.5%	4.8
Detroit	14,808	2.4%	6.4
Atlanta	14,314	2.3%	5.6
Saint Louis	13,185	2.1%	5.6
Cincinnati	12,001	1.9%	5.7

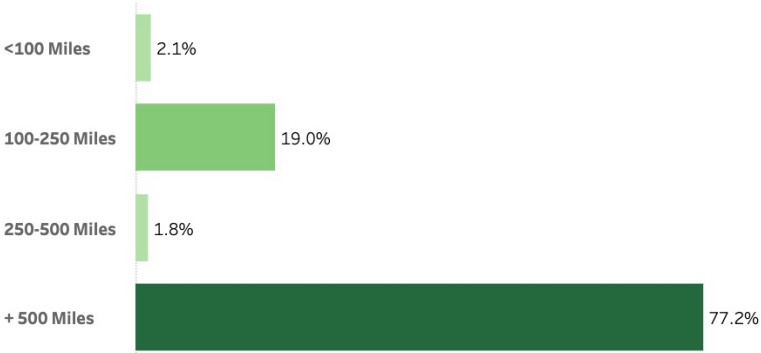
Trips by Day of Week



Trips by Length of Stay



Trips by Avg. Distance(miles)



Primary, domestic visitors outside 50 miles.



Visitation Profile | Sanibel Island



Total est. US adult Trips to POI

1.303.352

Average Nights

4.7

Average Distance Traveled

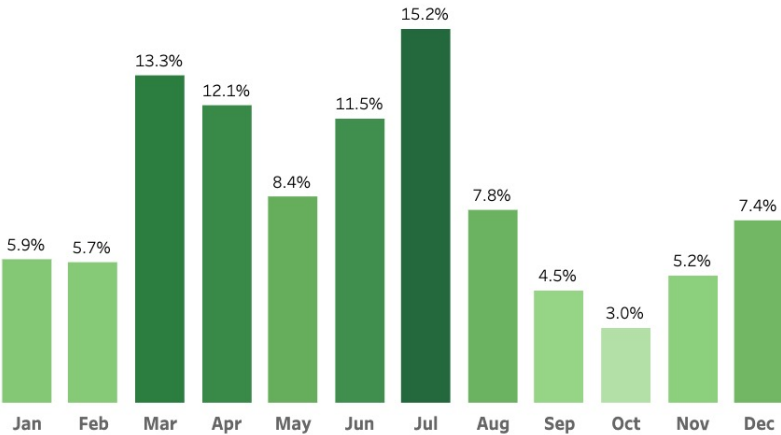
861.1 Miles

Trips by POI

Point of Interest	Trips	Share of Trips	Avg. Time in POI (Hours)
Sanibel Island	1,303,352	100.0%	28.2



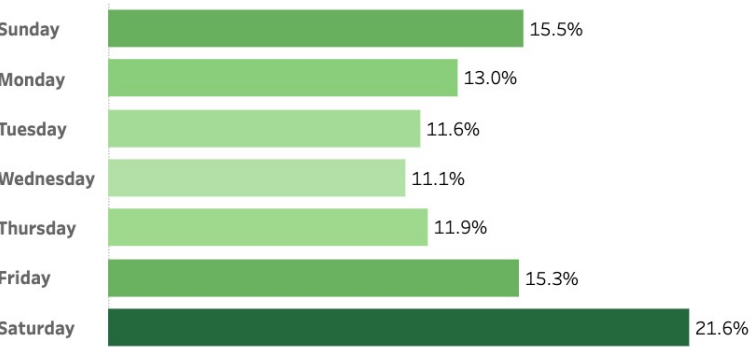
Trips by Month



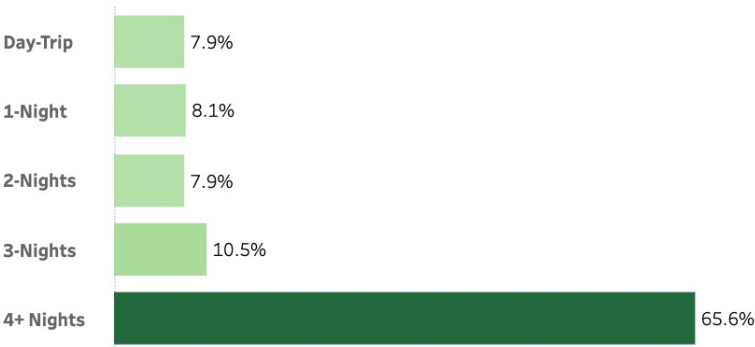
Top Origin Markets(DMA)

DMA	Trips	Share of Trips	Average Unique Nights
Miami/Fort Lauderdale	115,209	8.8%	1.9
Tampa/Saint Petersburg	80,739	6.2%	1.8
Minneapolis/Saint Paul	64,717	5.0%	5.6
Chicago	64,298	4.9%	5.6
New York	54,862	4.2%	5.1
Orlando/Daytona Beach/Melbourne	52,473	4.0%	2.9
West Palm Beach/Fort Pierce	42,329	3.2%	2.2
Cleveland	37,114	2.8%	5.6
Indianapolis	35,231	2.7%	5.6
Atlanta	32,217	2.5%	4.9
Detroit	30,890	2.4%	6.2
Cincinnati	30,686	2.4%	5.4
Philadelphia	27,984	2.1%	5.5

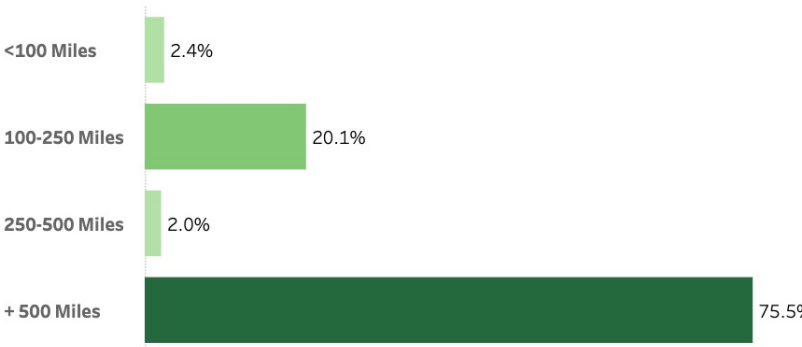
Trips by Day of Week



Trips by Length of Stay



Trips by Avg. Distance(miles)



Primary, domestic visitors outside 50 miles.



Visitation Profile | Cape Coral

Total est. US adult Trips to POI
2.213.030

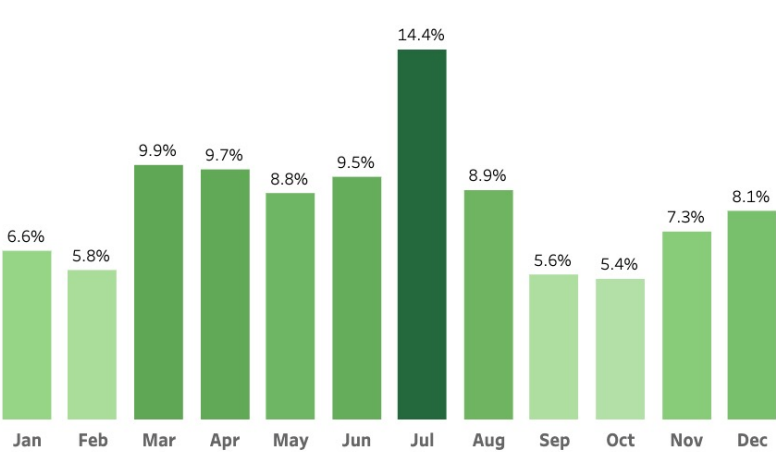
Average Nights
3.4

Average Distance Traveled
660.0 Miles

Trips by POI

Point of Interest	Trips	Share of Trips	Avg. Time in POI (Hours)
Cape Coral	2,213,030	100.0%	44.7

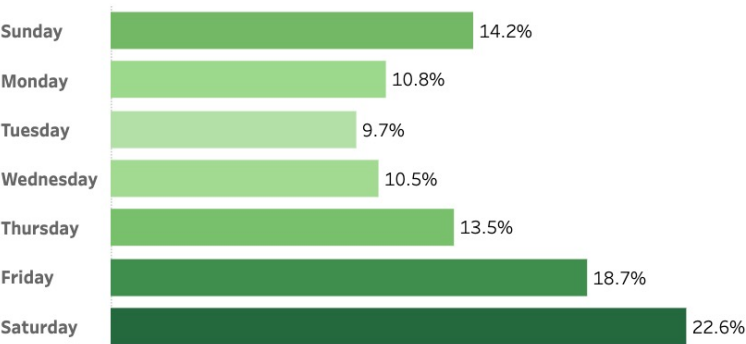
Trips by Month



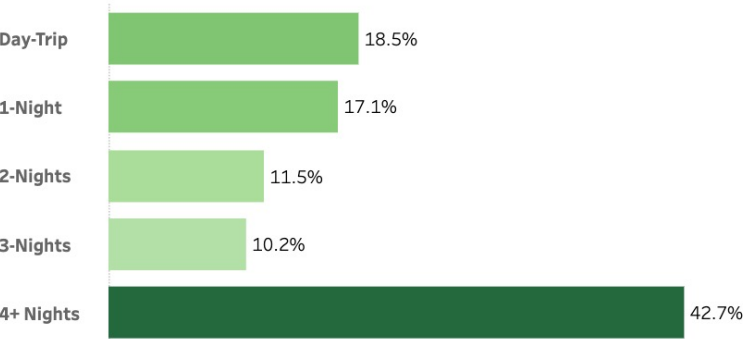
Top Origin Markets(DMA)

DMA	Trips	Share of Trips	Average Unique Nights
Miami/Fort Lauderdale	440,786	19.9%	1.7
Tampa/Saint Petersburg	310,559	14.0%	1.2
Orlando/Daytona Beach/Melbourne	107,553	4.9%	2.3
New York	94,022	4.2%	4.3
Chicago	91,404	4.1%	4.6
West Palm Beach/Fort Pierce	90,769	4.1%	1.6
Minneapolis/Saint Paul	76,729	3.5%	5.3
Philadelphia	50,113	2.3%	4.6
Detroit	50,098	2.3%	5.3
Cleveland	38,713	1.7%	5.4
Atlanta	35,773	1.6%	4.1
Boston	31,366	1.4%	4.3
Indianapolis	30,013	1.4%	5.5

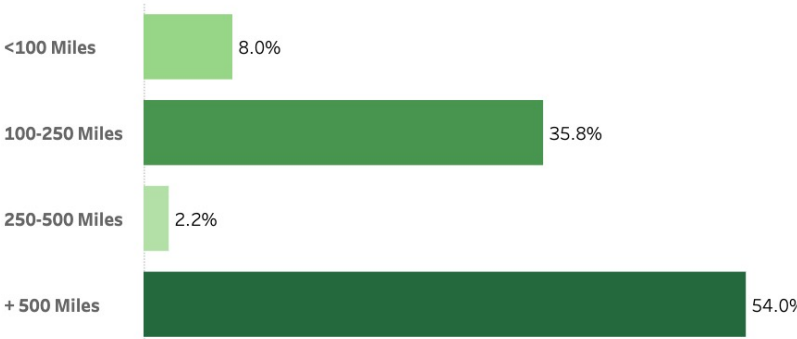
Trips by Day of Week



Trips by Length of Stay



Trips by Avg. Distance(miles)

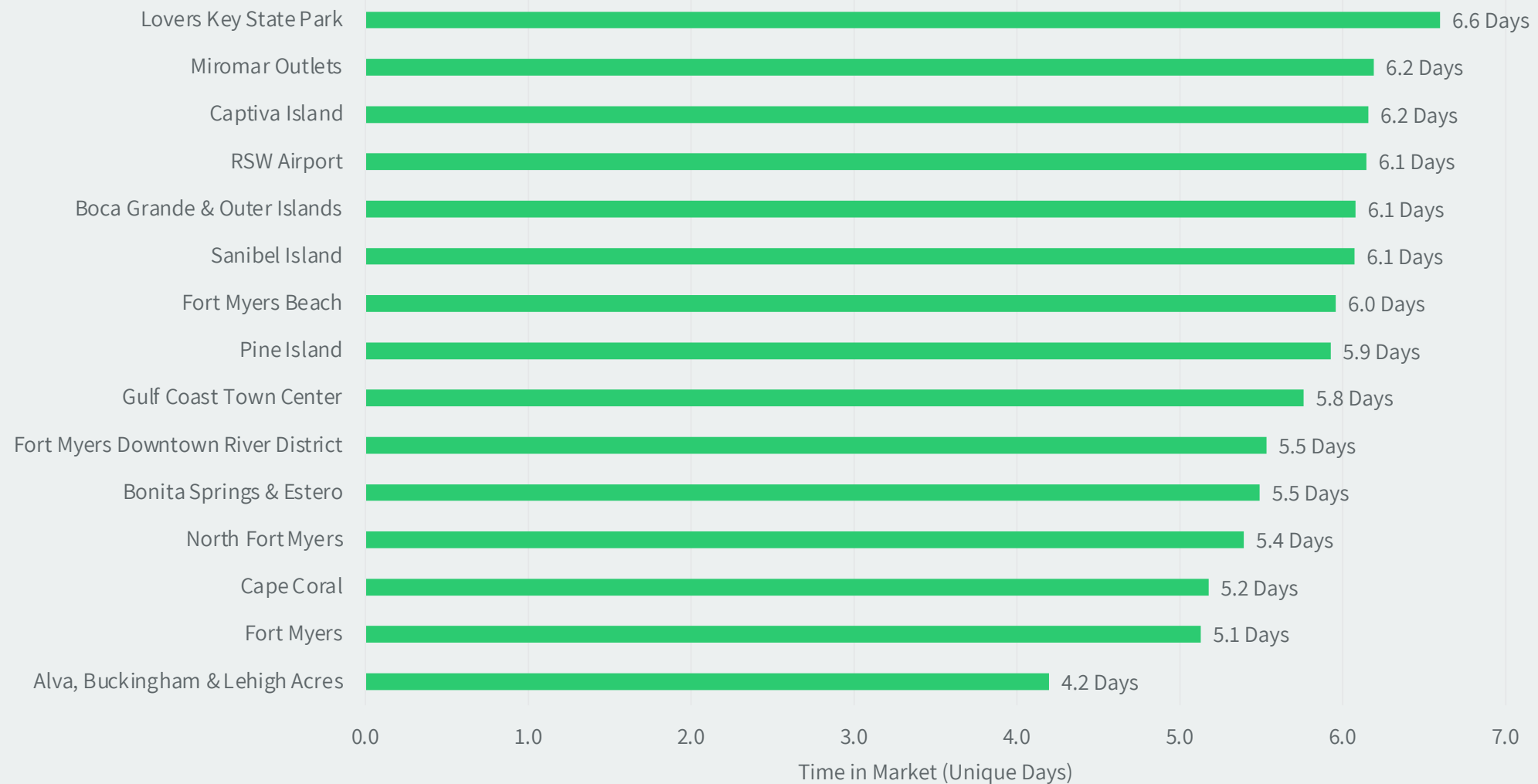


Primary, domestic visitors outside 50 miles.



POIs by Length of Stay in Lee County

Time in Market by POI



Key Takeaways

- Location data allows destinations to better understand their visitors to better reach and influence them.
- Looking at Florida, we see Lee County gained competitive share of overnight trips since 2019.
- The scales have tipped towards out of state visitors (overnight), who stay longer and travel longer than their in-state counter-parts.
- Deploy tactics to
 - Increase Length of Stay of In State Visitors
 - Grow share of out of state visitors
- Nearly 4 in 10 overnight trips involve the closest airports, and fly share is shifting toward 2019 level. Get to know them, but don't alienate the drivers.
- Visitors Point of Interest behavior varies by origin market, season, and length of stay
- The Midwest shows an increasing share of flights
- Most of your River District visitors are from out of state. Help orient them and inform them of events and unique offerings.
- Detroit, Cleveland, Minneapolis and Indianapolis shoppers are staying over a week. Entice them to spend and do more.
- Fort Myers Beach and Captiva Island visitors hail from different origin markets with their own visitation patterns.



Thank You!

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