Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

Oct – Dec 2021

Visitor Tracking, Occupancy & Economic Impact Study

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

fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

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

QUARTERLY SNAPSHOT

- Tourism is booming, with all economic impact metrics **exceeding pre-pandemic levels**
- The **travel planning cycle** was **longer** compared to 2020
- More October – December 2021 visitors flew to the Fort Myers area via **RSW**
- There were more **international visitors** compared to 2020
- October – December 2021 visitors were more likely to stay in a **condo/vacation home**
- October – December 2021 visitors in paid accommodations **stayed longer**

68.7%
OCCUPANCY RATE
↑ 8.9% from 2019

$152.67
AVERAGE DAILY RATE
↑ 11.1% from 2019

$104.88
REVENUE PER ROOM
↑ 21.0% from 2019

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

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

TOURISM SNAPSHOT: KEY METRICS OCTOBER – DECEMBER 2020 VS. 2021

Visitor & Lodging Statistics	Oct – Dec 2020	Oct – Dec 2021	% Change '20-'21
Visitors	1,097,800	1,301,600	+18.6%
Room Nights	1,320,900	1,780,000	+34.8%
Direct Expenditures[1]	$644,054,500	$959,551,100	+49.0%
Total Economic Impact[2]	$1,045,944,500	$1,529,524,500	+46.2%[3]

[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.

TOURISM SNAPSHOT: KEY METRICS OCTOBER – DECEMBER 2019 VS. 2021

Visitor & Lodging Statistics	Oct – Dec 2019	Oct - Dec 2021	% Change '19-'21
Visitors	1,249,500	1,301,600	4.2%[1]
Room Nights	1,456,300	1,780,000	22.2%[1]
Direct Expenditures[2]	$743,544,500	$959,551,100	29.1%[1]
Total Economic Impact[3]	$1,207,516,300	$1,529,524,500	26.7%[4]

[1] The year-over-year increase in room nights and visitor spending is higher than the increase in the number of visitors due to the increase in the percentage of visitors staying in paid accommodations and their longer length of stay in October – December 2021, increased number of rental units available in 2021, and increased visitor spending in 2021 on almost every category of spending, e.g., accommodations, restaurants, shopping, etc.

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

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

[4] As of January 2021, the IMPLAN multiplier used to estimate economic impact is 1.594.

TOURISM SNAPSHOT: KEY METRICS FOR THE CALENDAR

Visitor & Lodging Statistics	CYTD 2019	CYTD 2020	CYTD 2021	% Change '19-'21
Visitors	4,926,400	3,391,700	4,687,500	-4.8%[1]
Room Nights	5,638,700	4,413,800	6,394,800	+13.4%[1]
Direct Expenditures[2]	$3,272,030,100	$2,631,887,000	$3,729,946,900	+14.0%[1]
Total Economic Impact[3]	$5,313,776,600	$4,274,184,500	$5,945,535,400	+11.9%[4]

[1] The year-over-year increase in room nights and visitor spending is higher than the increase in the number of visitors due to the increase in the percentage of visitors staying in paid accommodations and their longer length of stay in October – December 2021, increased number of rental units available in 2021, and increased visitor spending in 2021 on almost every category of spending, e.g., accommodations, restaurants, shopping, etc.

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

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

[4] As of January 2021, the IMPLAN multiplier used to estimate economic impact is 1.594.

October – December LODGING STATISTICS

68.7%	$152.67	$104.88
Occupancy	ADR	RevPAR
↑ 8.9%	↑ 11.1%	↑ 21.0%
From 2019	From 2019	From 2019

VISITOR JOURNEY: PRE-VISIT

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

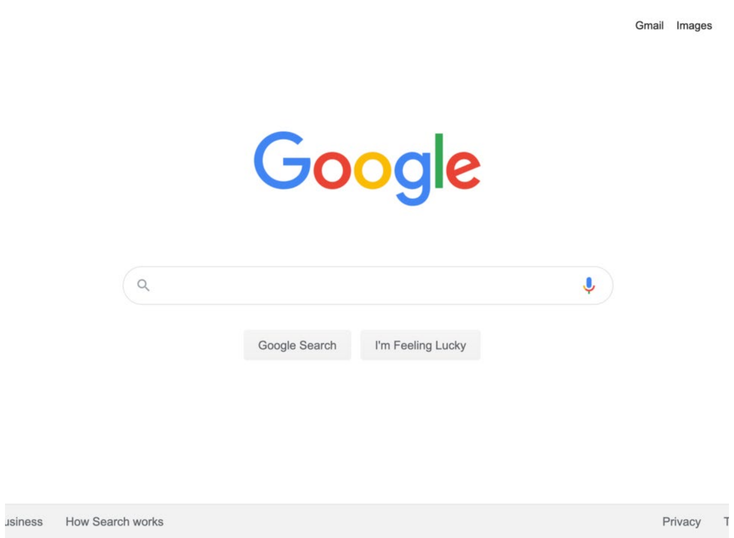
TRIP PLANNING

- Over half of visitors planned their trips to the Fort Myers area at least 3 months in advance
- 4 out of 5 visitors used websites/apps to plan their trips
- 1 in 3 visitors requested information to plan their trips
    - Nearly 1 in 4 called a hotel/motel/condo when planning their trips
- 22% of visitors considered choosing other destinations when planning their trips

TRIP PLANNING: WEBSITES/APPS USED

- 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]:

29% Airline websites/apps



28% Search engines

22% Airbnb, VRBO, Homeaway, or similar website

[1]Multiple responses permitted.

TOP TRIP INFLUENCERS

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

92% Warm weather

91% Peaceful/relaxing

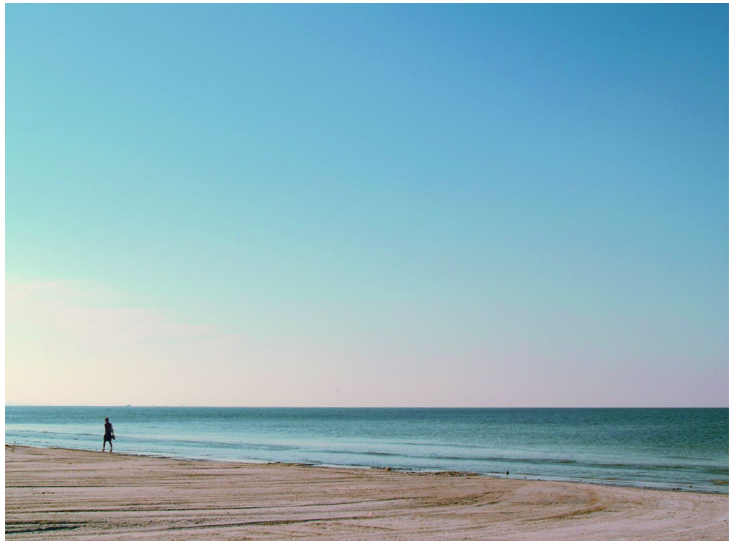
87% Safe destination

[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.

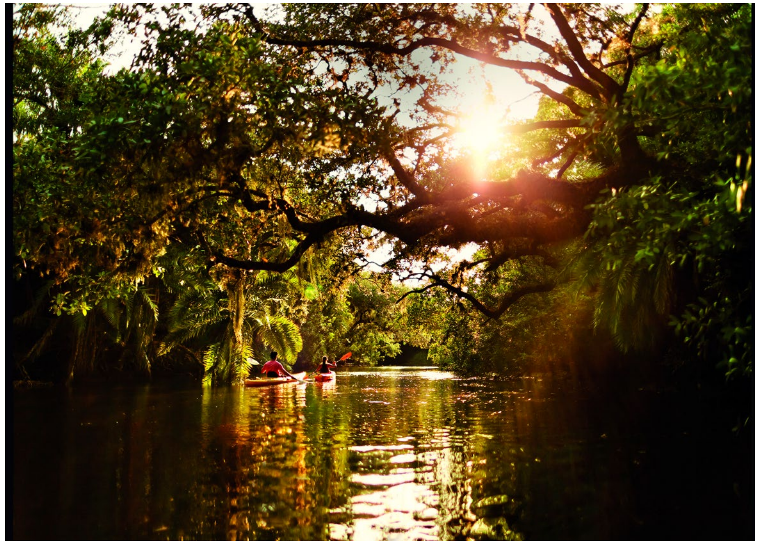
TOP REASONS FOR VISITING

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

56% Vacation



47% Beach



40% Relax & unwind

[1]Three responses permitted.

PROMOTIONS

- 33% of visitors recalled promotions in the past 6 months for the Fort Myers area
- Top sources of recall include[1]:

44% Internet

34% Social media

[1]Multiple responses permitted.

BOOKING

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

49% Directly with hotel

16% VRBO, HomeAway

13% Other online travel agency

9% Airbnb

8% Vacation rental company

TRANSPORTATION

- 75% 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

Pre-Visit

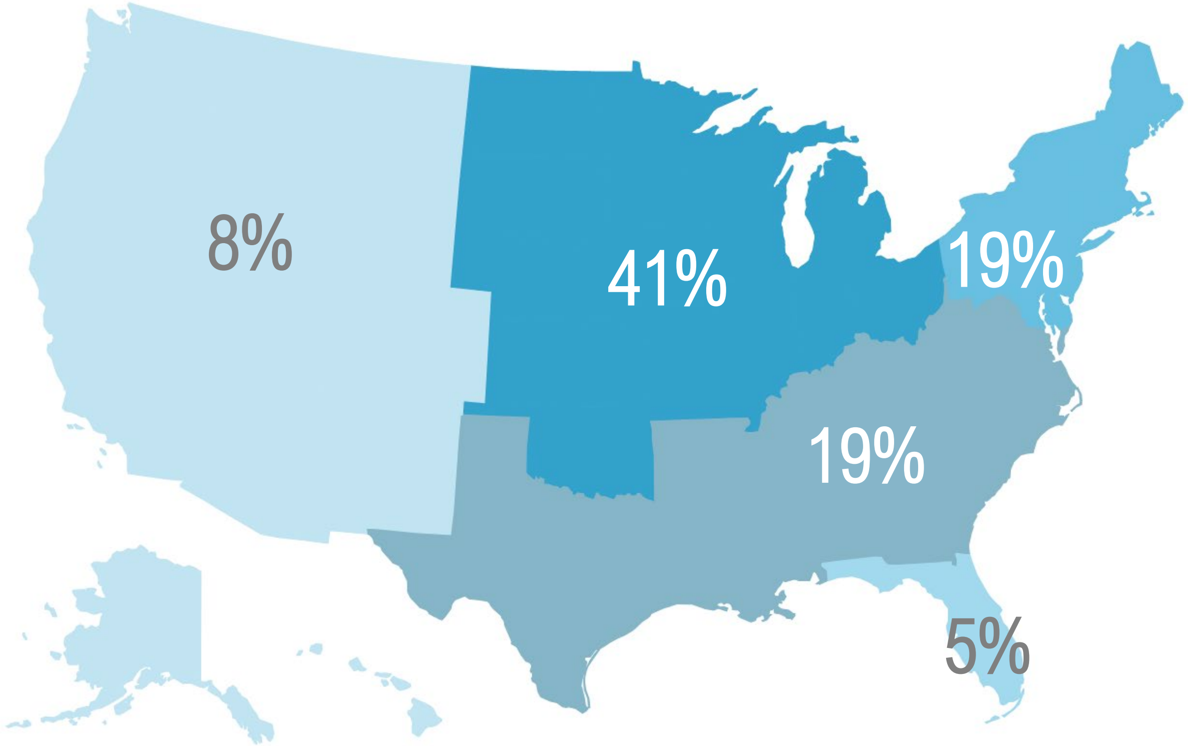
Travel Party Profile

Trip Experience

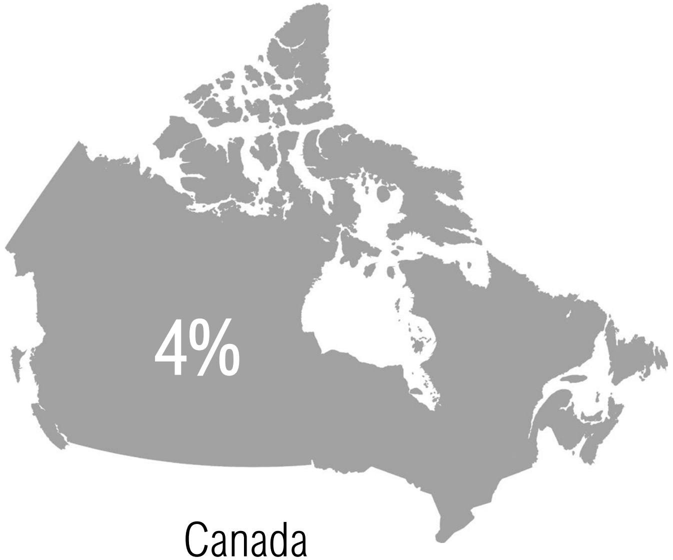
Post-Trip Evaluation

Economic Impact on Destination

ORIGIN



US = 92%



Canada

TOP ORIGIN MARKETS

5% New York City

4% Chicago

4% Minneapolis

4% Atlanta

TRAVEL PARTY SIZE AND COMPOSITION

- Visitors traveled in a party composed of 3.0 people[1]
- 30% traveled with children under the age of 18
- 37% traveled as a family, while a similar percentage traveled as a couples

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

DEMOGRAPHIC PROFILE

Oct – Dec Visitors:

- Average age of 52 years old
- Median household income of $110,200
- Married (72%)
- College educated (66%)
- Caucasian/white (82%)
- Female (55%)

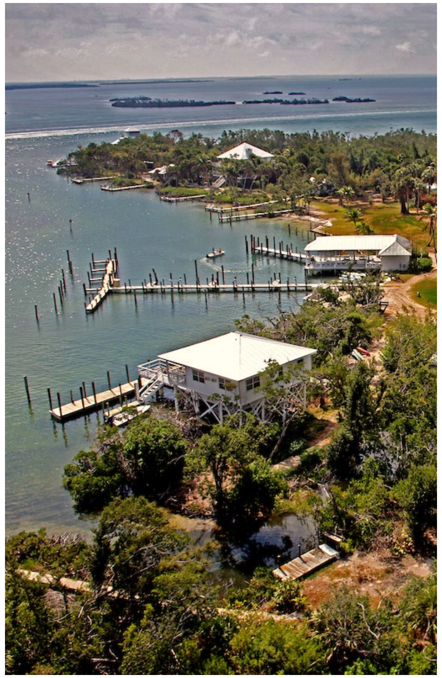
Visitor Journey: Trip Experience

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

ACCOMMODATIONS

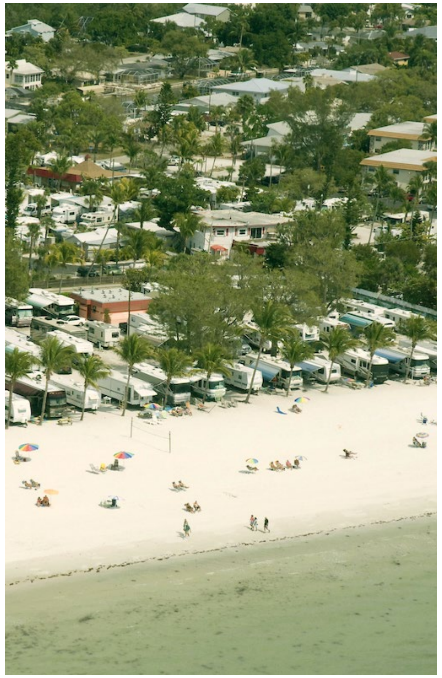
42% Condo/Vacation Rental

32% Hotel/Motel/Resort/B&B



22% Non-paid Accommodations

3% Day trippers



1% RV Park/Campground

LENGTH OF STAY & NUMBER OF TIMES IN DESTINATION

- Visitors[1] spent 5.7 nights in the Fort Myers area
- 29% were first time visitors
- 23% have visited more than 10 times

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

VISITOR ACTIVITIES

- Top visitor activities include[1]:

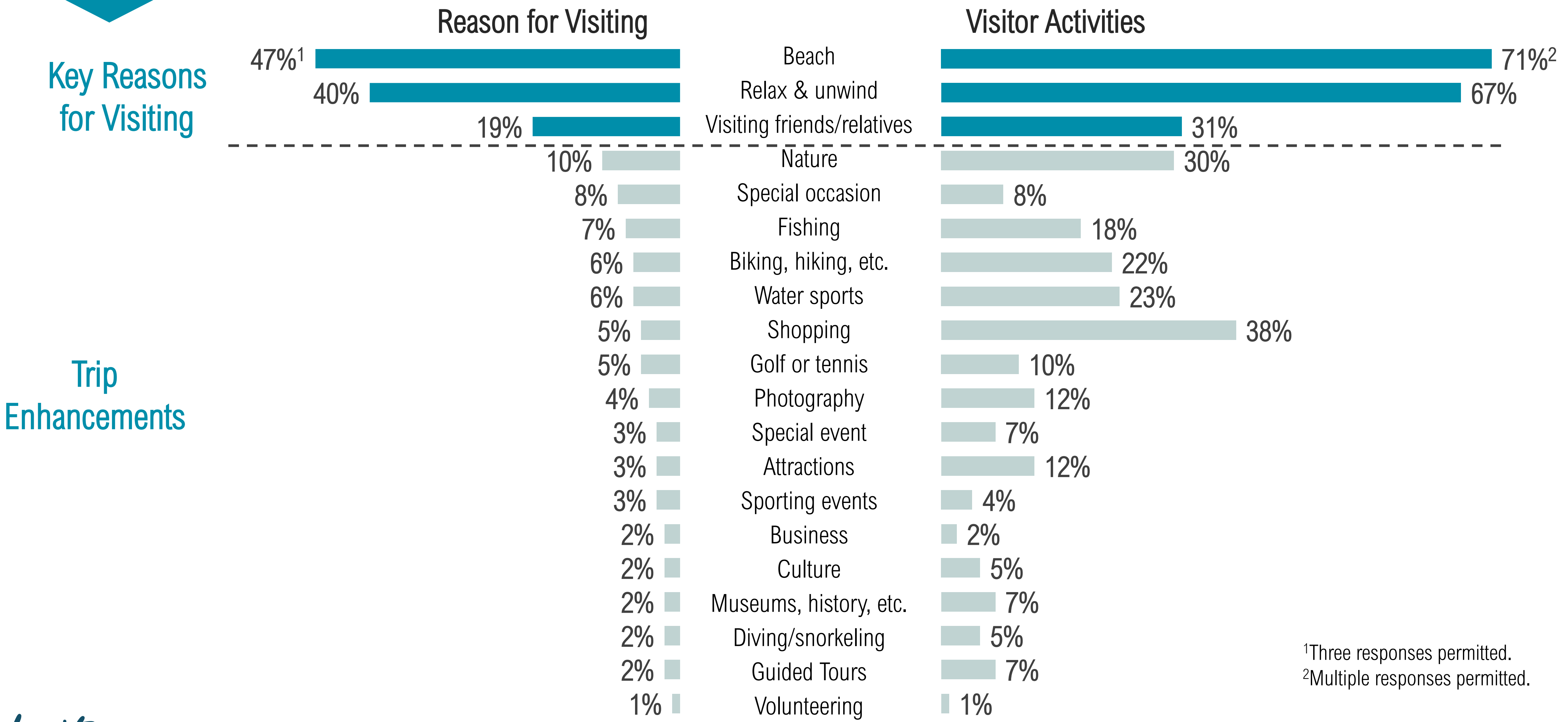
71% Beaches

67% Relax & unwind

57% Dining

[1]Multiple responses permitted.

REASON FOR VISITING VS. VISITOR ACTIVITIES



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

Fort Myers Islands, Beaches & Neighborhoods

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TOP ATTRACTIONS VISITED[1]

76% Beaches

31% Sanibel Lighthouse

30% Fort Myers Beach Pier

[1]Multiple responses permitted.

TOP COMMUNITIES STAYED

31% Sanibel Island

24% Fort Myers Beach

14% Fort Myers

13% Cape Coral

VISITOR JOURNEY: POST-TRIP EVALUATION

SATISFACTION

- **95%** of visitors are **likely to recommend** the Fort Myers area
- **89%** of visitors are **likely to return**
- **63%** 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 (66% were very satisfied)
- **92%** of visitors were **satisfied or very satisfied with customer service** on their visit (59% 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

94% 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

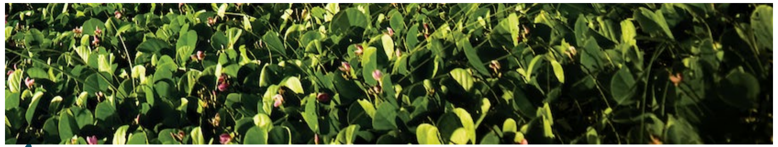
→ Over 1 in 5 were concerned about high prices and insects

→ 30% of visitors had no concerns about the destination

AREA DESCRIPTIONS

Warm Weather

"Water was warm, and the weather was fantastic in October!"

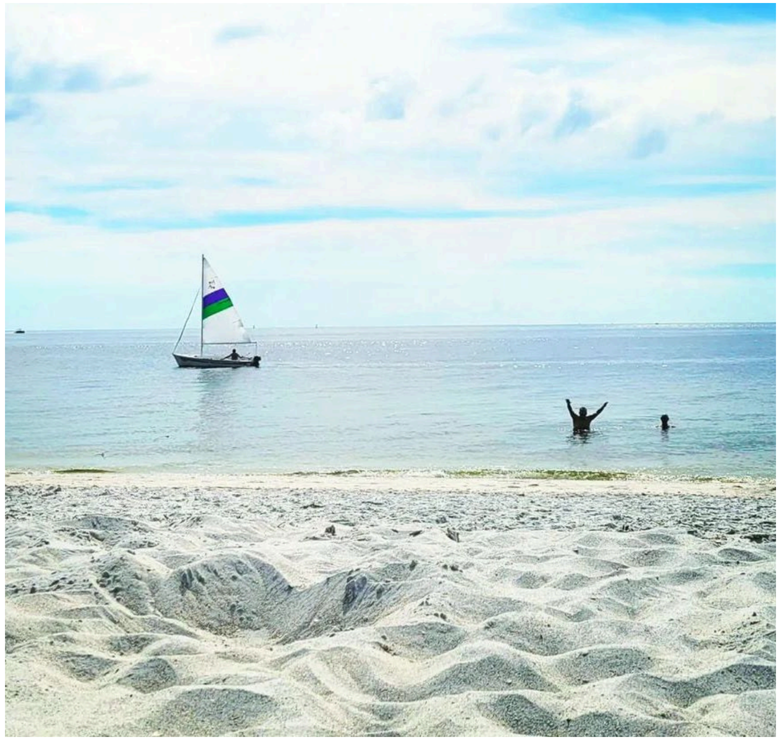


Beautiful Beaches

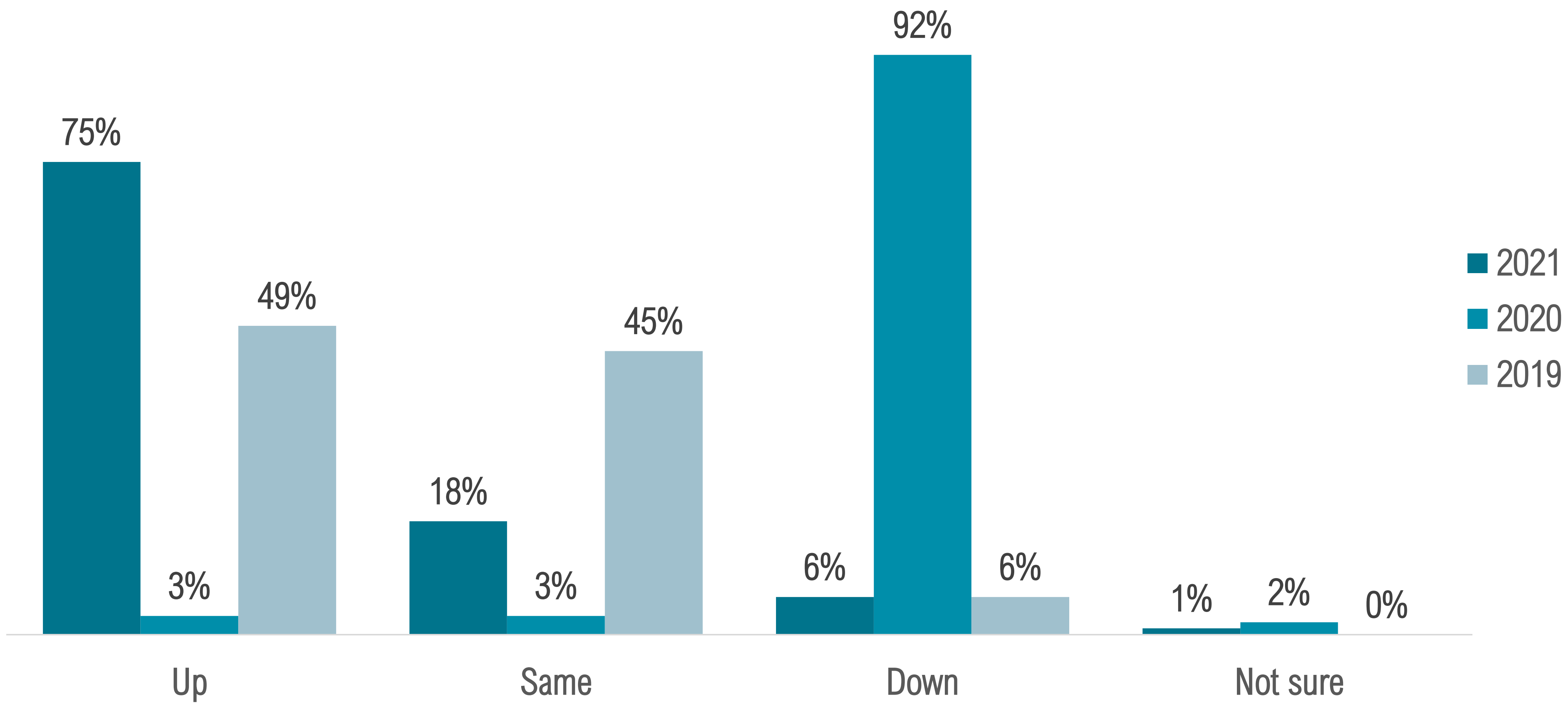
"Nice vacation with gorgeous beaches, sunsets, restaurants, and happy hours. Great boating and jet skis and kayaking."

Wonderful Place to Visit

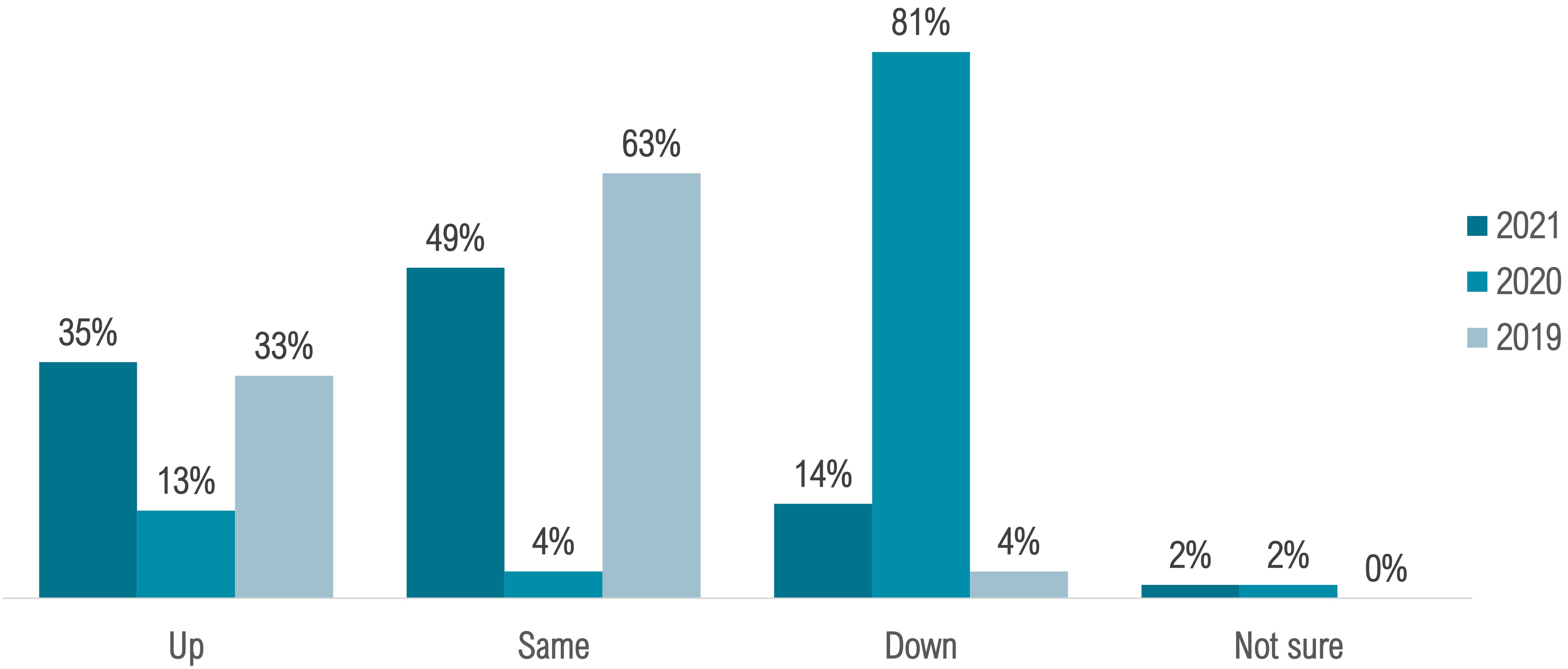
"A wonderful vacation destination is tropical atmosphere great weather and plenty to see and do."



OCCUPANCY BAROMETER: JANUARY – MARCH RESERVATIONS



OCCUPANCY BAROMETER: APRIL – JUNE RESERVATIONS



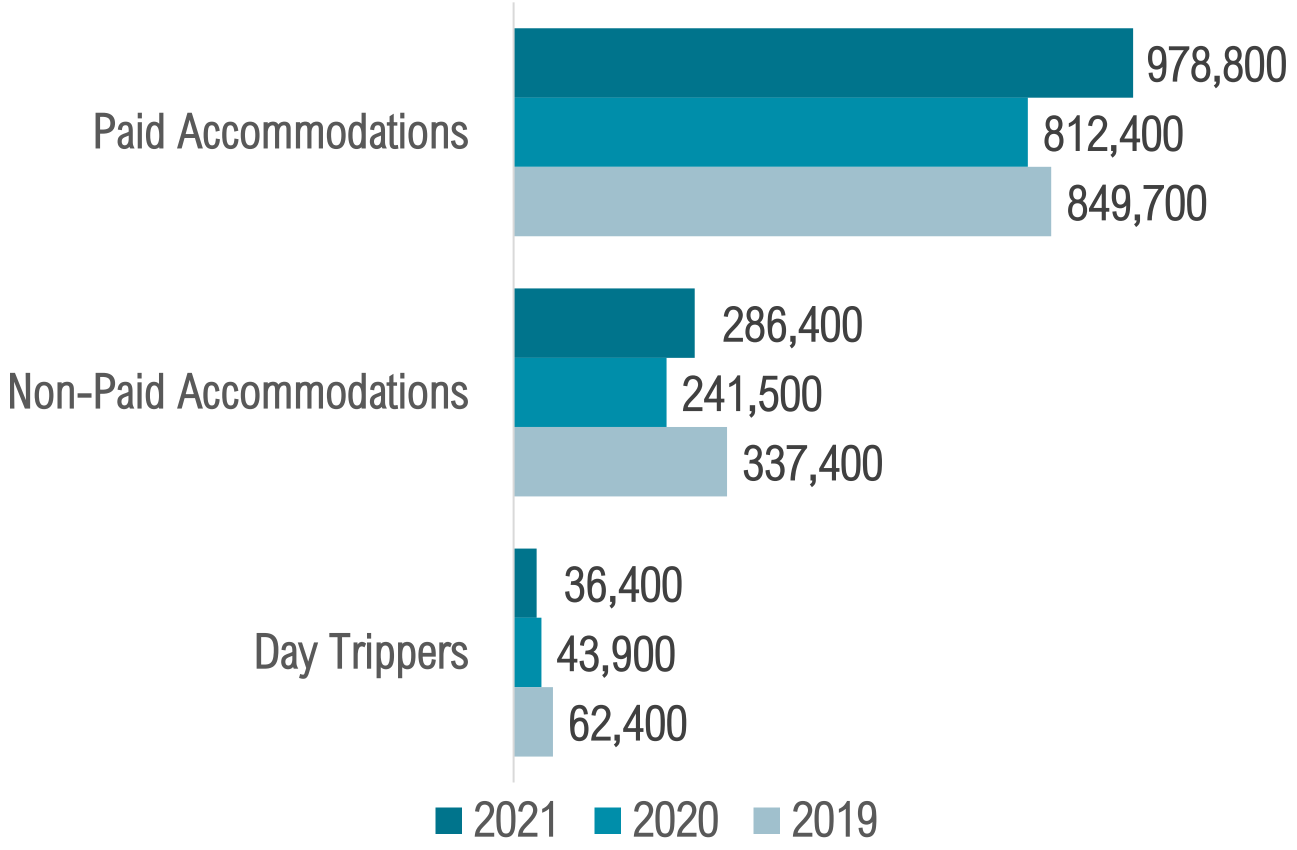
Detailed Findings

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

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

NUMBER OF VISITORS

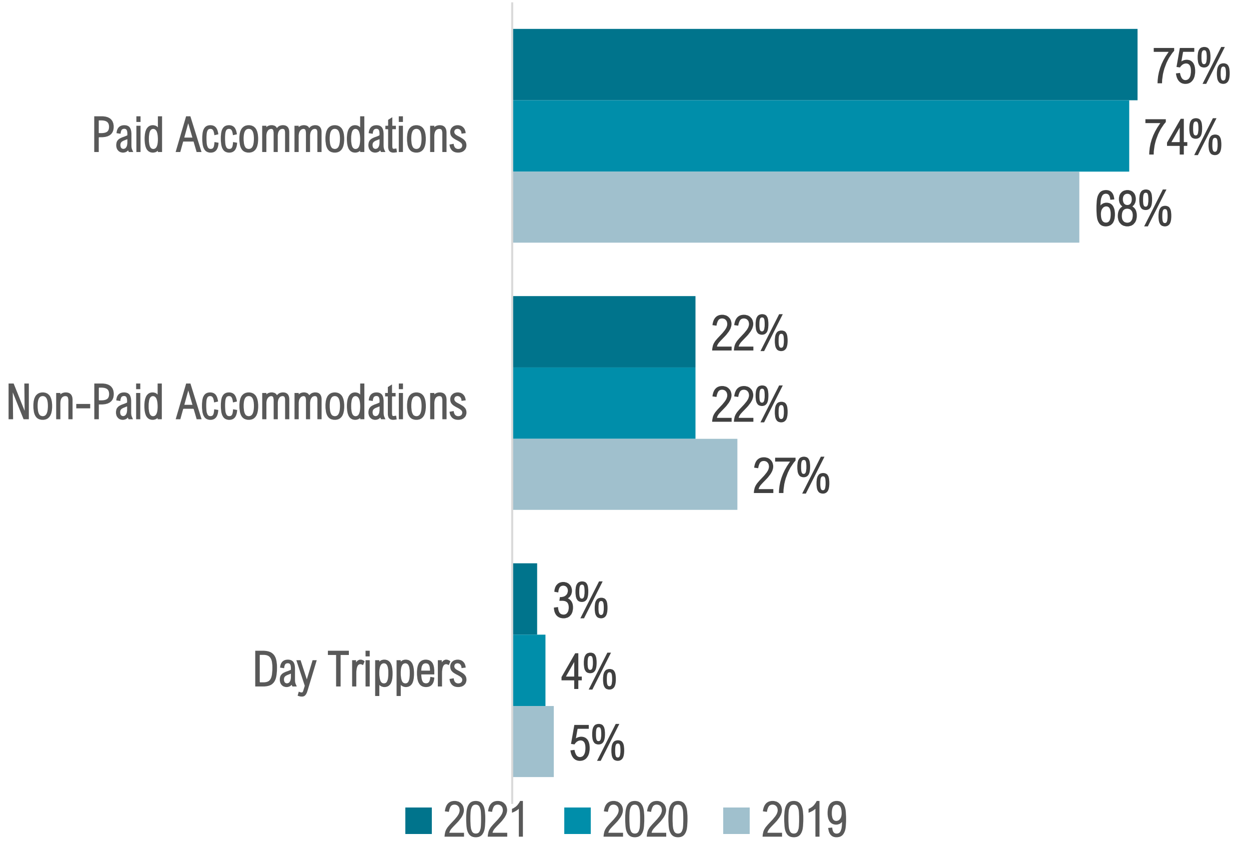
There were 1,301,600[1] visitors to the Fort Myers area in Oct – Dec 2021 (+4.2% from 2019 & +18.6% from 2020).



[1]Sources: Visitor Tracking Study & Occupancy Survey

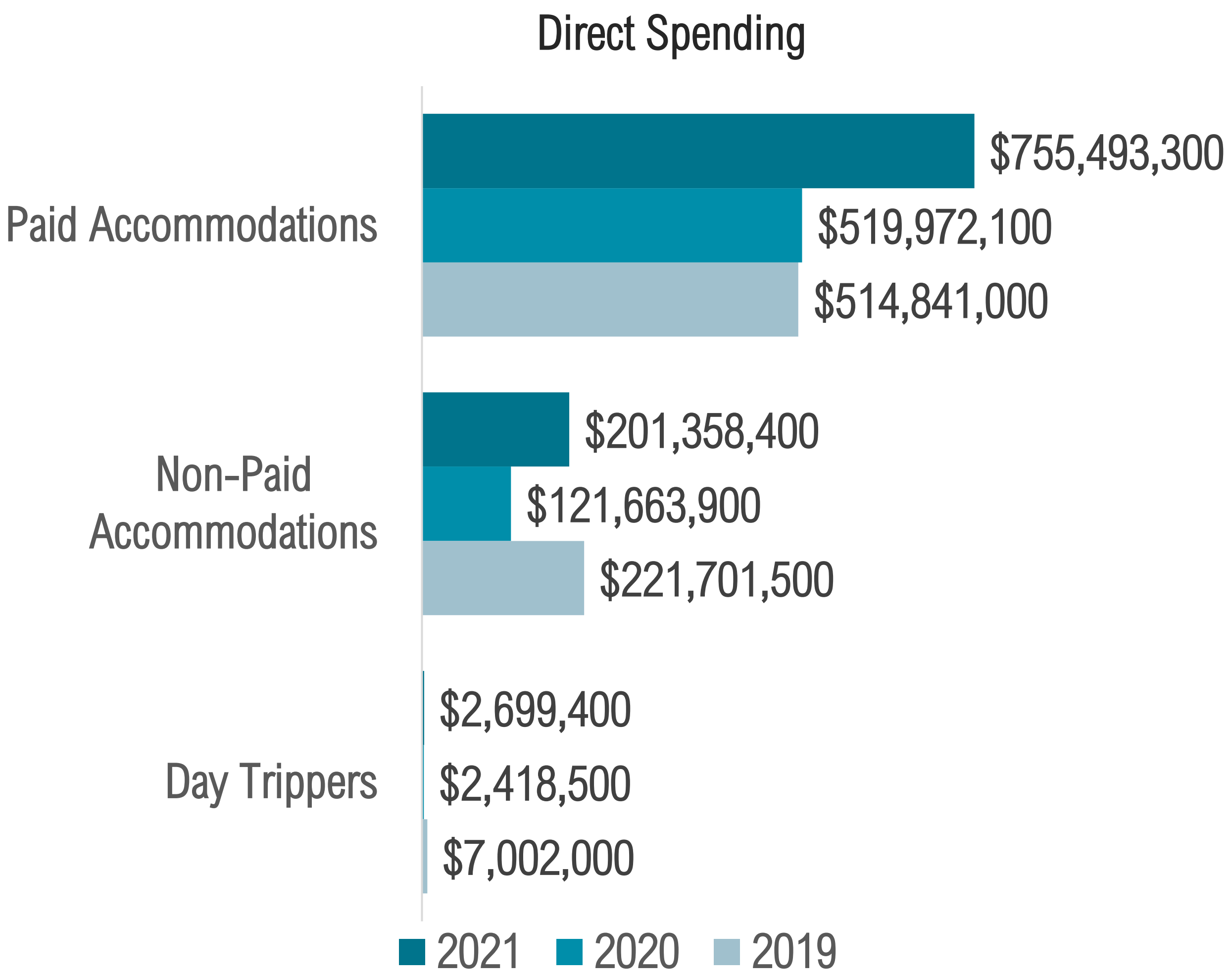
VISITOR TYPE

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



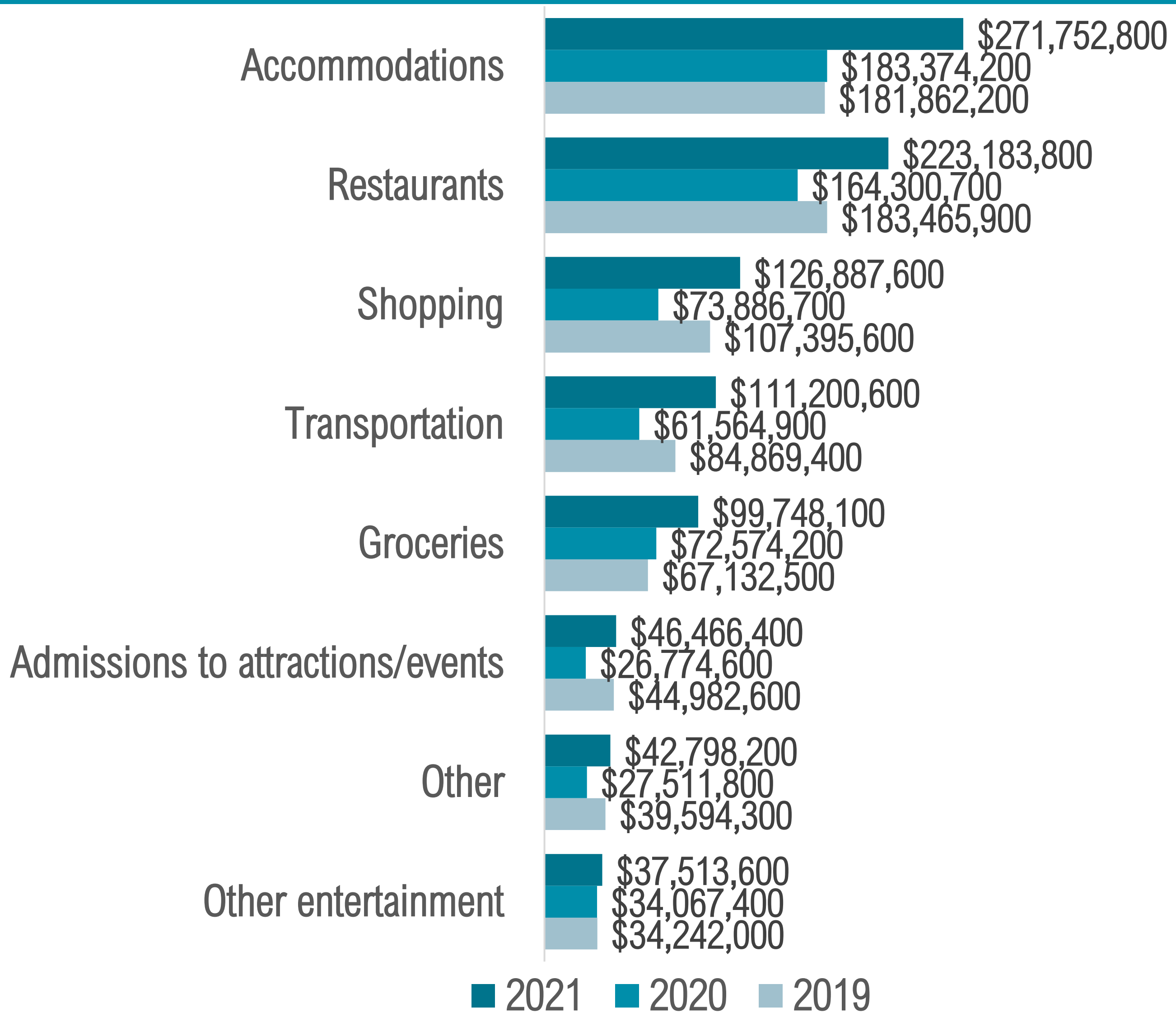
VISITOR EXPENDITURES BY VISITOR TYPE

Oct – Dec visitors spent $959,551,100 in the Fort Myers area, resulting in a total economic impact of $1,529,524,500, up 26.7% from 2019 & up 46.2% from 2020.



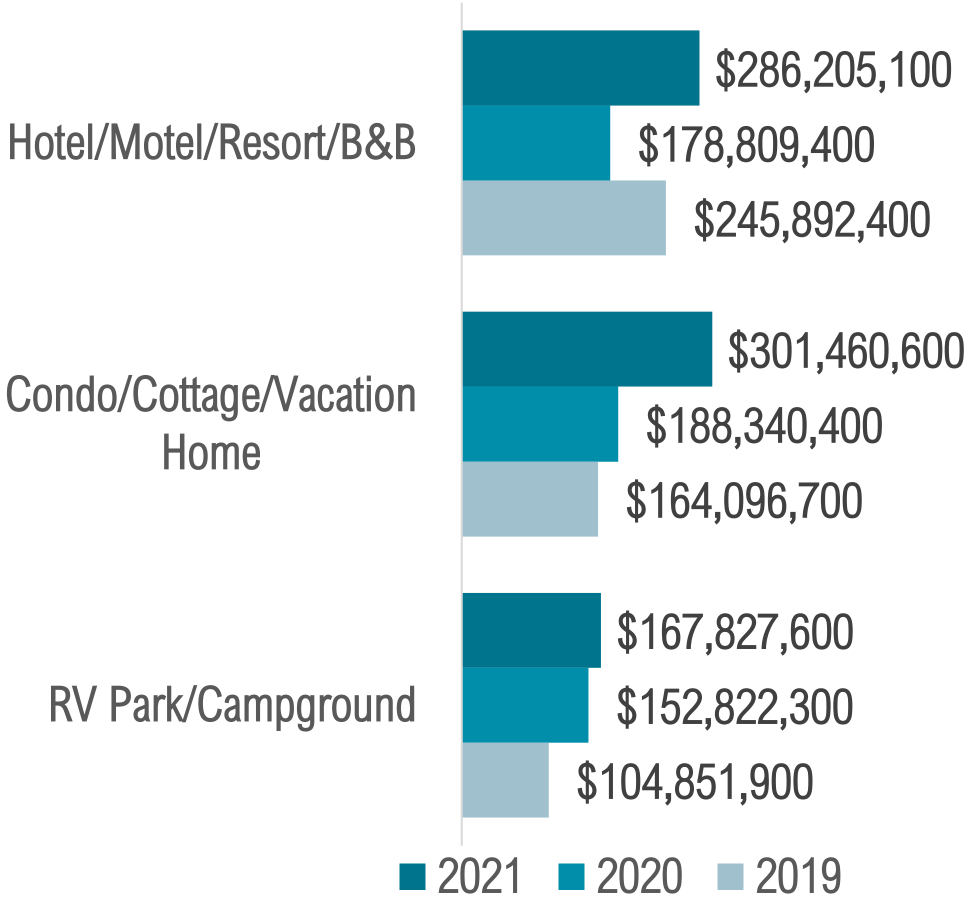
VISITOR EXPENDITURES BY SPENDING CATEGORY

Of the $959,551,100 visitors spent in the Fort Myers area, 28% was spent on accommodations and 23% was spent on restaurants, accounting for 51% of all visitor spending.



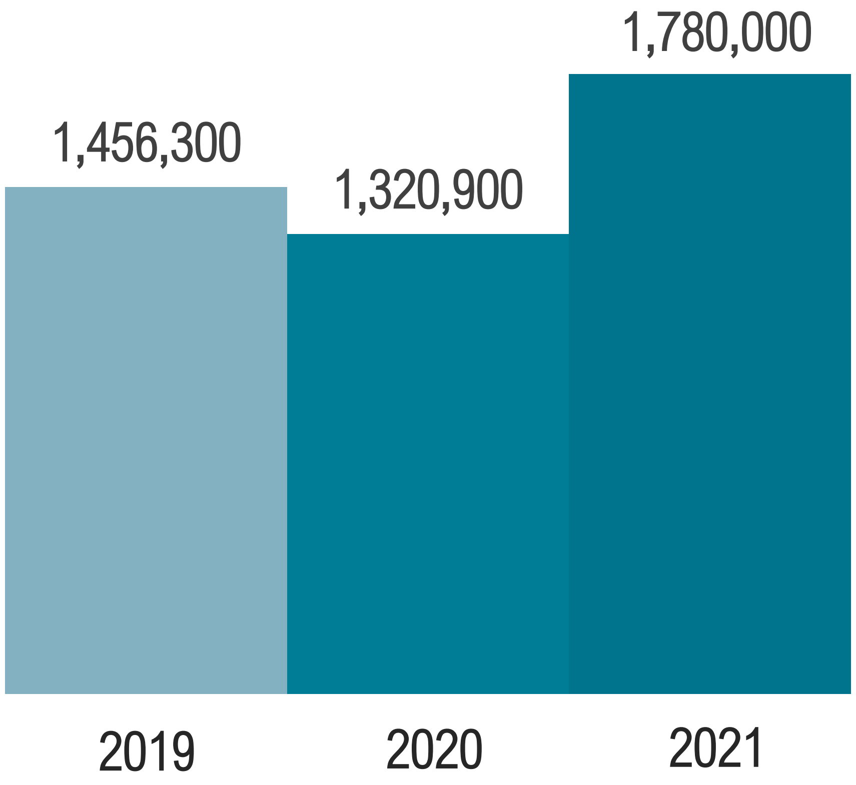
VISITOR EXPENDITURES BY LODGING TYPE

Oct – Dec visitors staying in paid accommodations spent **$755,493,400** in the Fort Myers area.



ROOM NIGHTS GENERATED

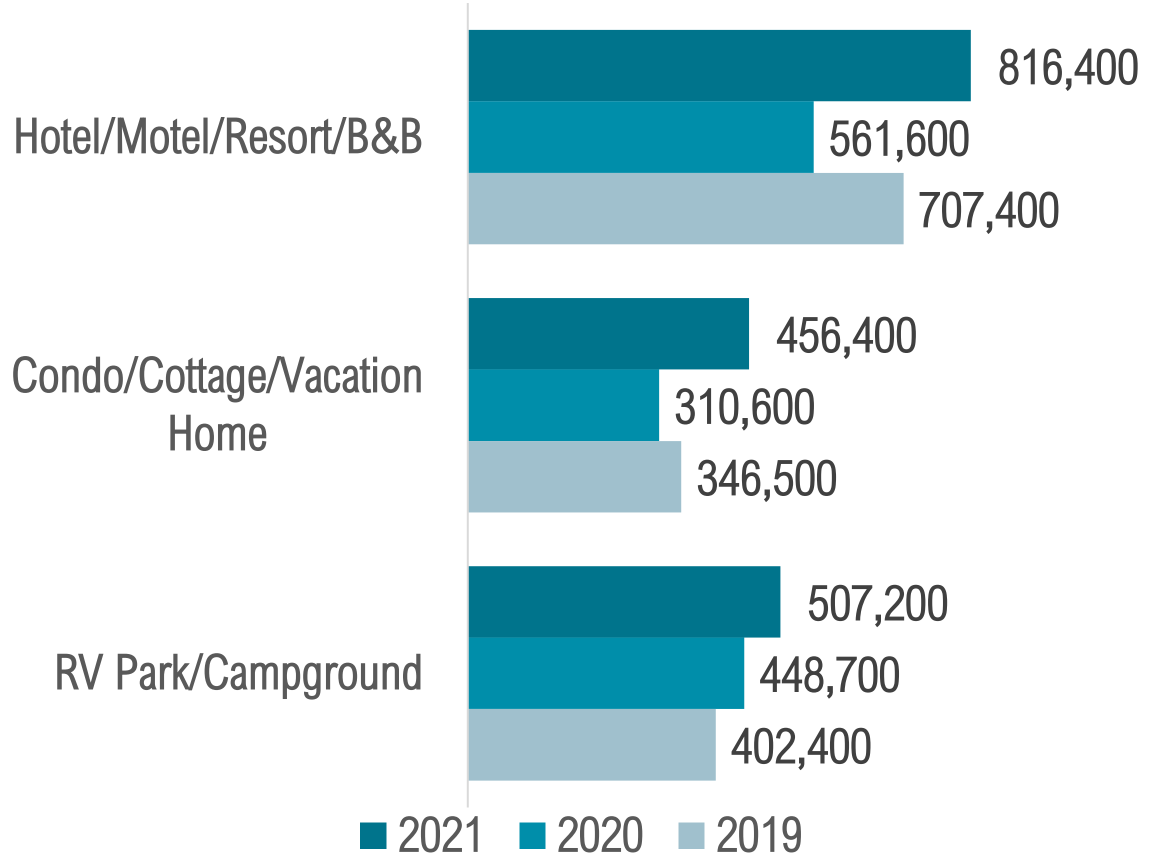
Oct – Dec visitors spent **1,780,000**[1] nights in Fort Myers area hotels, resorts, condos, rental houses, etc. (+22.2% from 2019 & +34.8% from 2020).



[1]Source: Occupancy Survey

ROOM NIGHTS GENERATED

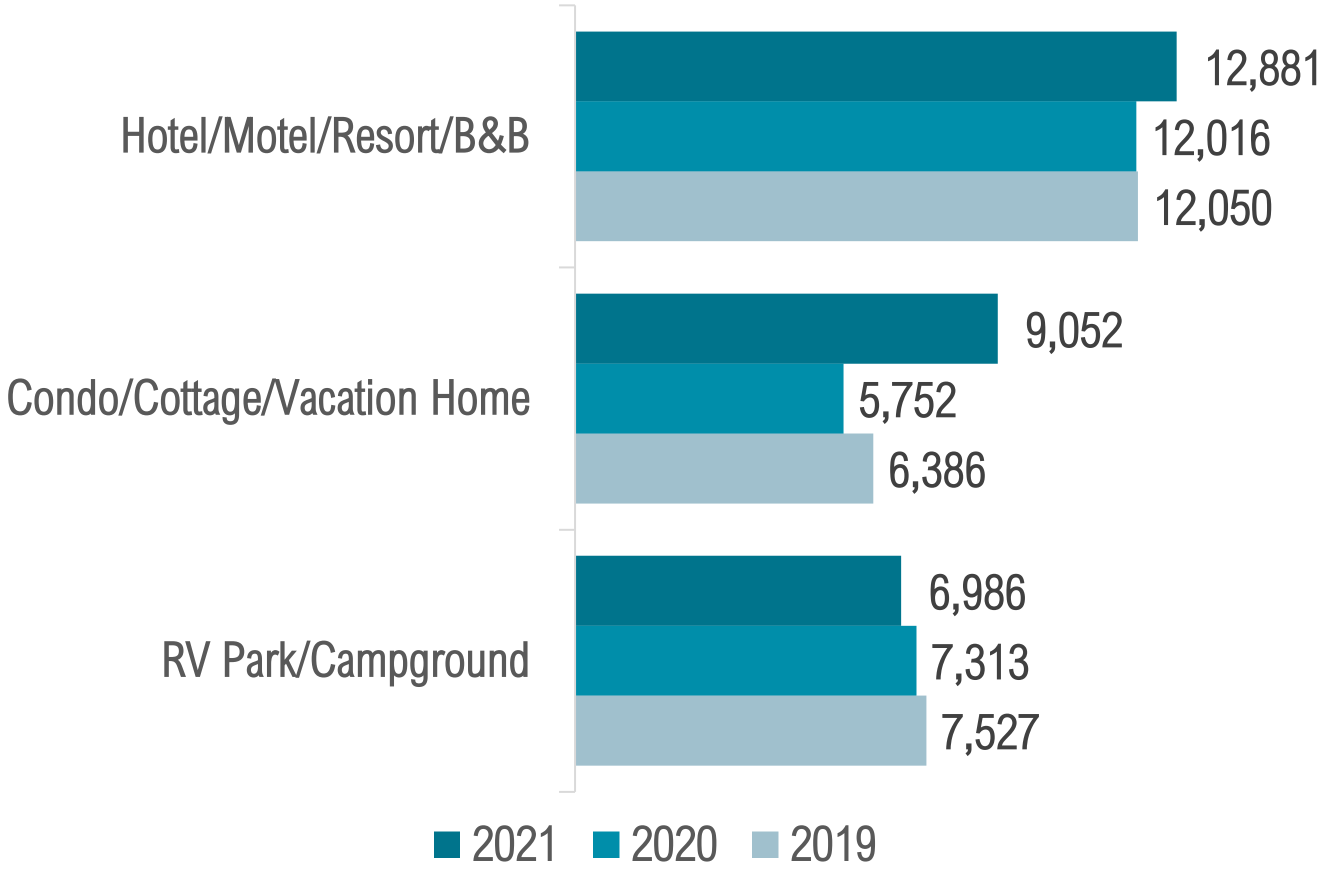
Motels, hotels, etc. accounted for over 2 in 5 nights in the Fort Myers area, while vacation rentals accounted for 1 in 4 nights visitors spent in the area.



[1]Source: Occupancy Survey

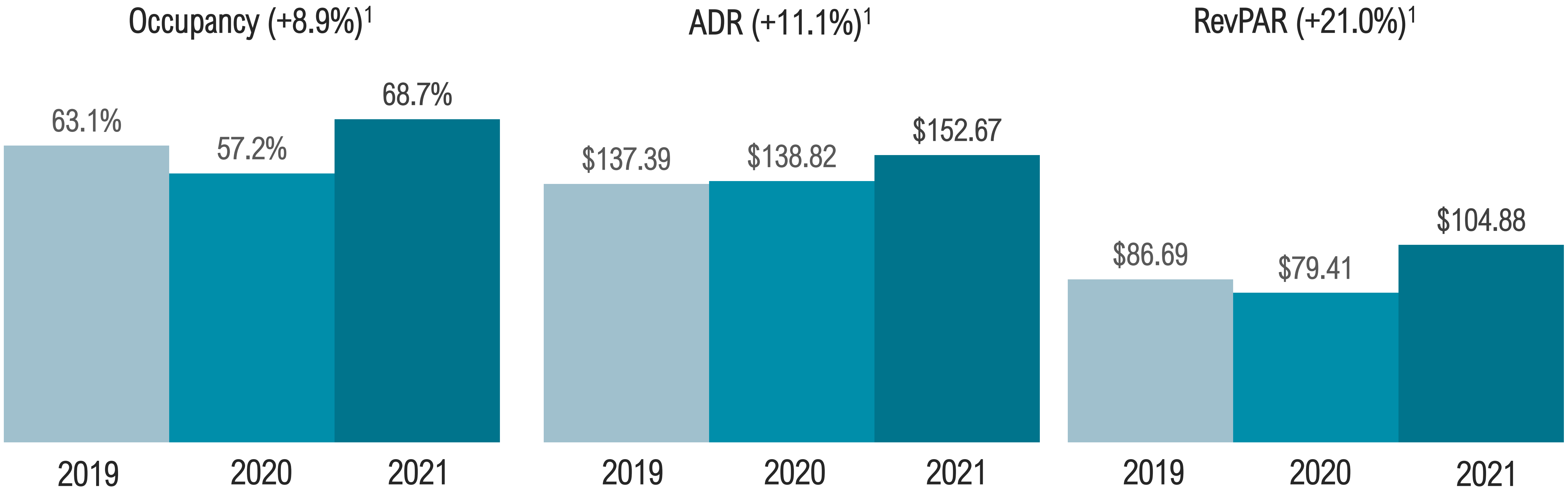
AVAILABLE UNITS

There were 28,919[1] available units in Oct – Dec, 2021 vs. 25,080 in 2020 (+15.3%) and 25,963 in 2019 (+11.4%). Nearly half of the units were hotels, motels, etc.



[1]Source: Occupancy Survey

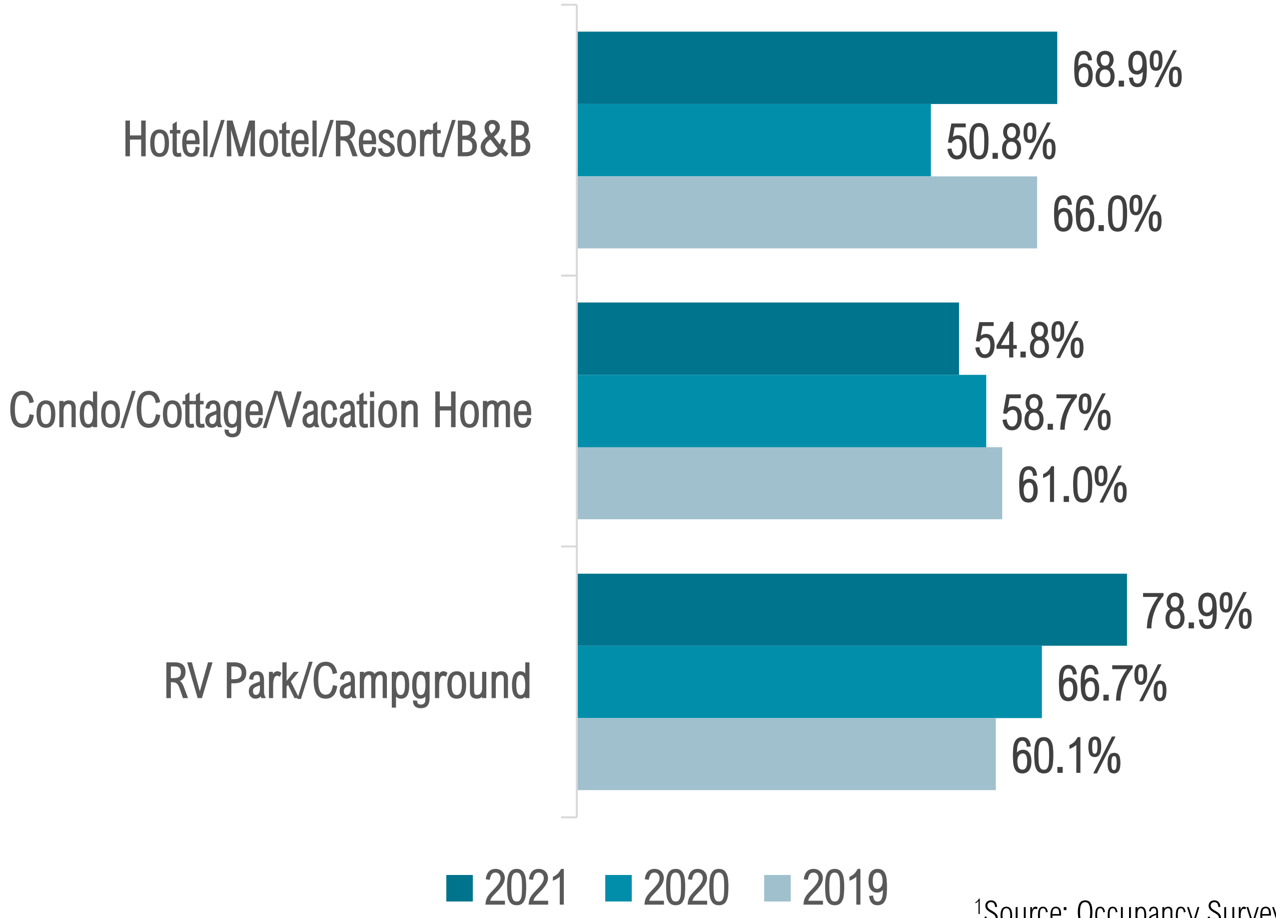
OCCUPANCY, ADR AND REVPAR



[1]Source: Occupancy Survey Compared to 2019

OCCUPANCY

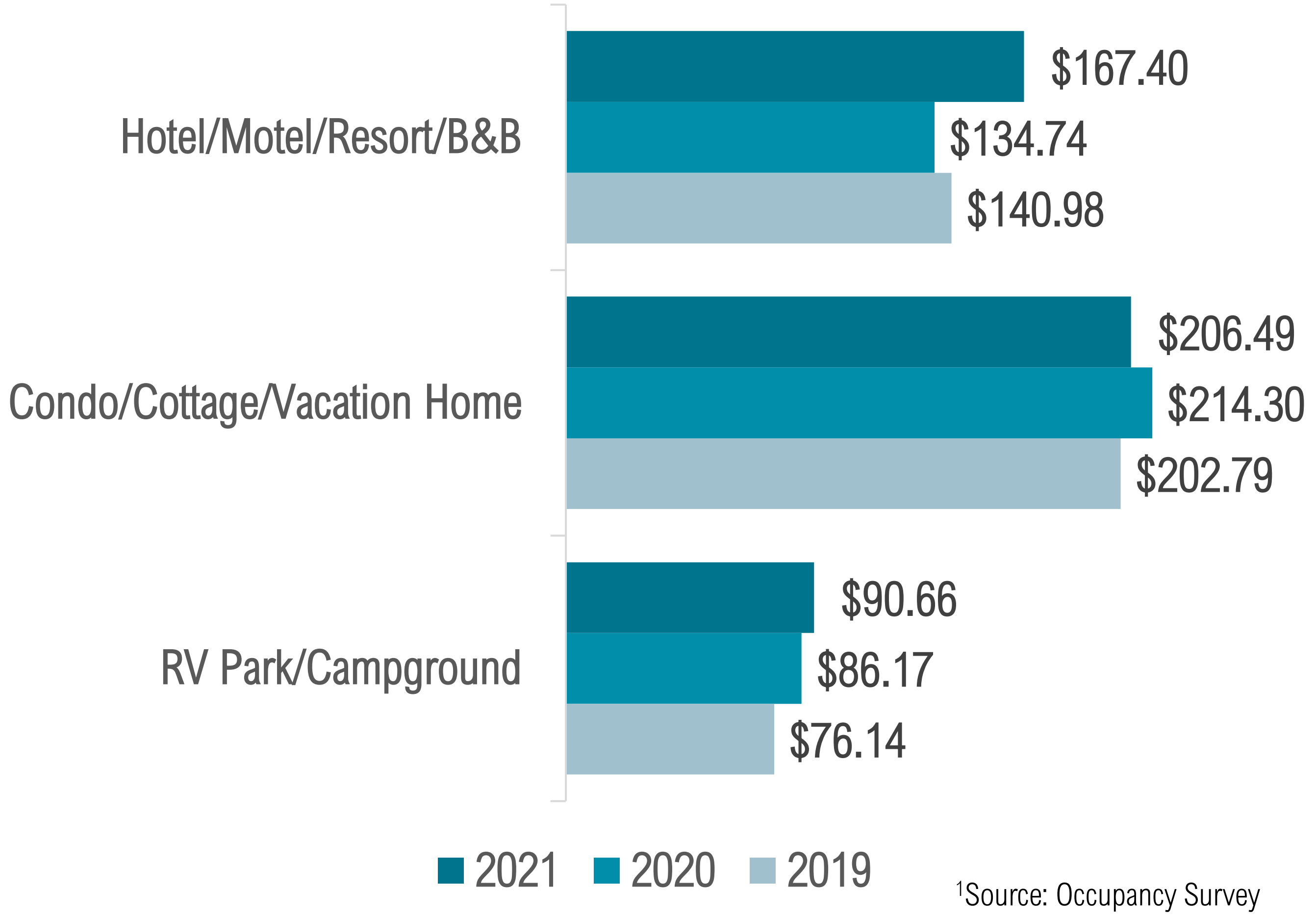
Average occupancy in Oct – Dec was **68.7%**[1] (57.2% in 2020 & 63.1% in 2019).



[1]Source: Occupancy Survey

ADR

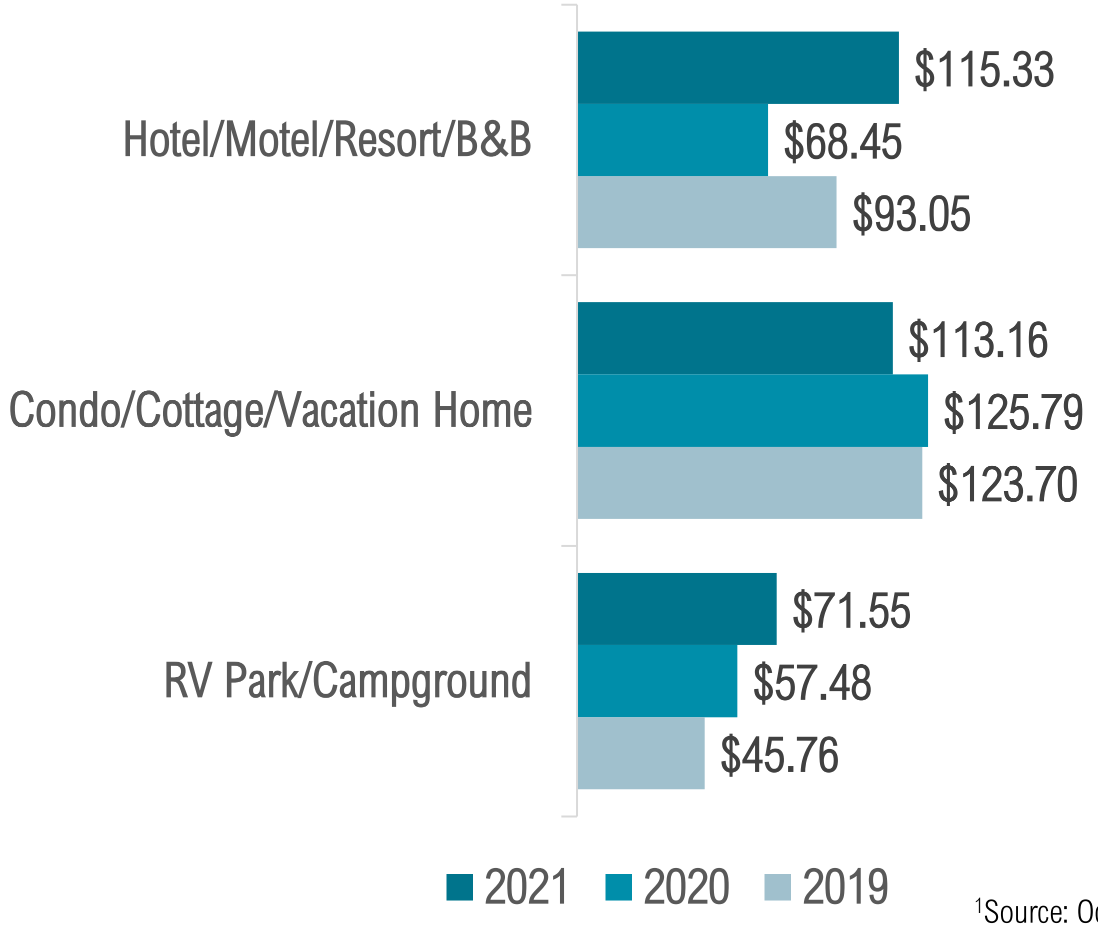
ADR in Oct – Dec was $152.67[1] ($138.82 in 2020 & $137.39 in 2019).



[1]Source: Occupancy Survey

REVPAR

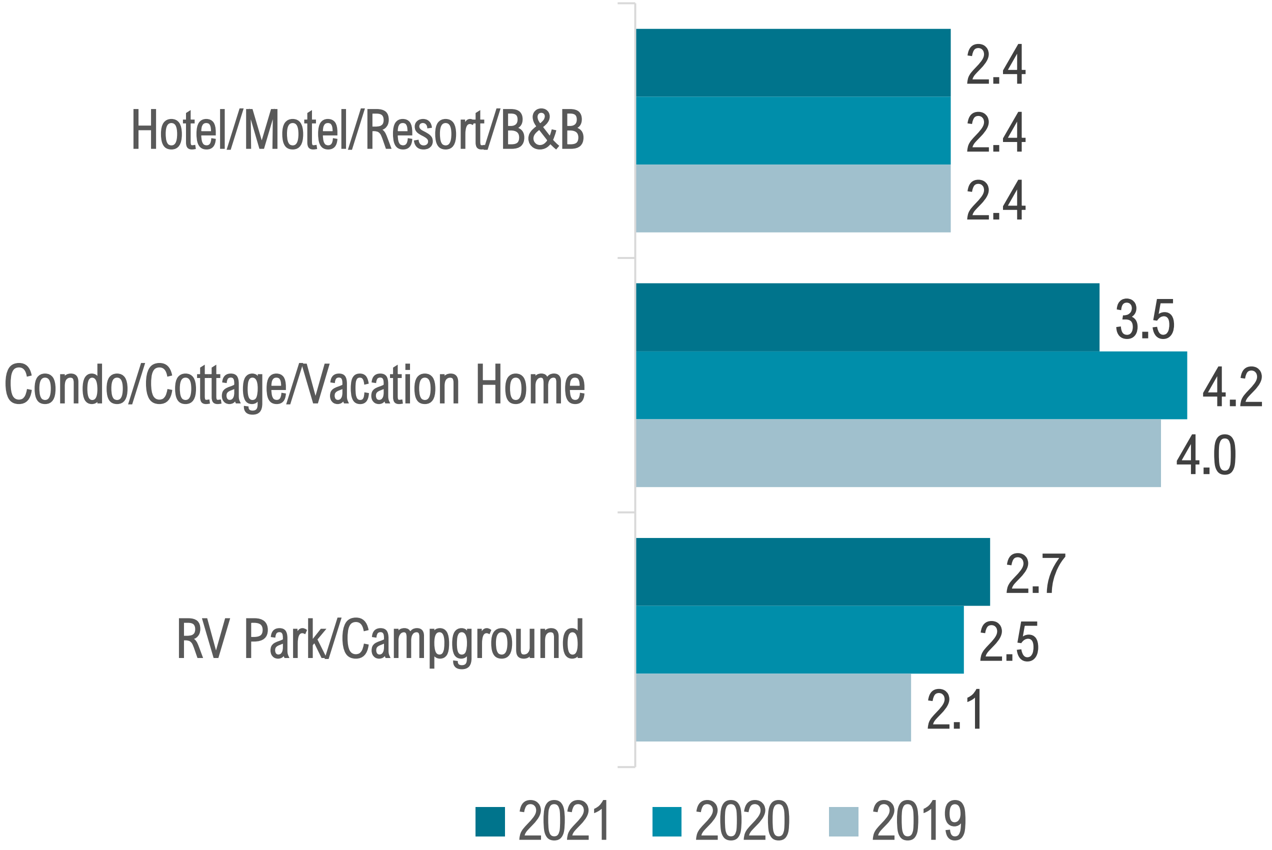
Average RevPAR in Oct – Dec was **$104.88** ($79.41 in 2020 & $86.69 in 2019).



[1]Source: Occupancy Survey

TRAVEL PARTY SIZE

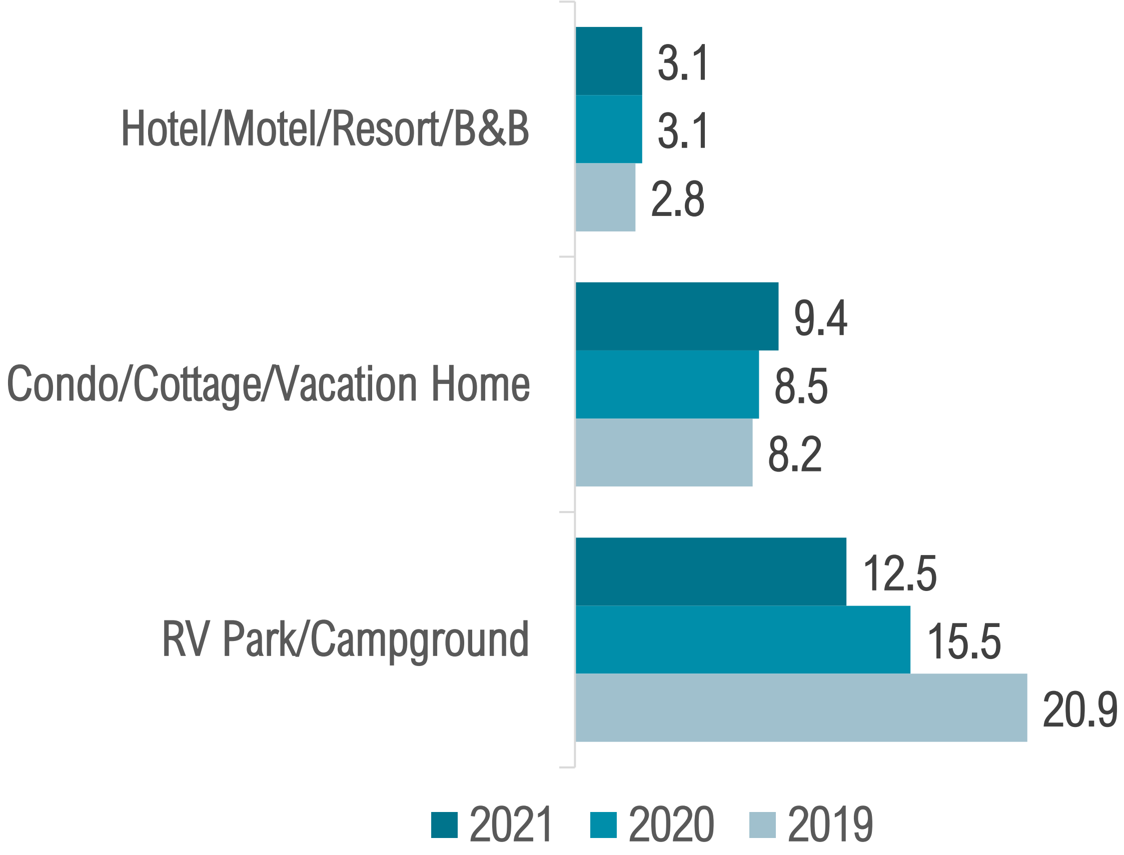
For visitors in paid accommodations, average travel party size in Oct – Dec was **3.0 people**[1] (2.8 people in 2020 & 2.7 people in 2019).



[1]Source: Occupancy Survey

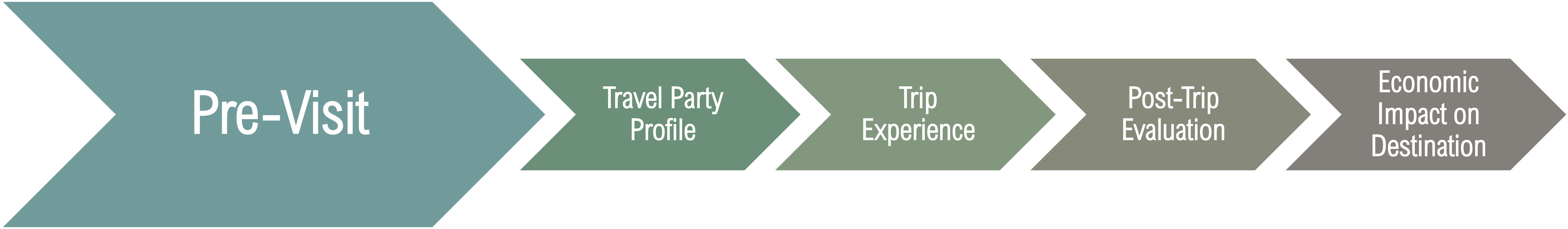
LENGTH OF STAY

For visitors in paid accommodations, average length of stay in Oct – Dec was **5.4 nights**[1] (4.6 nights in 2020 & 4.8 nights in 2019).



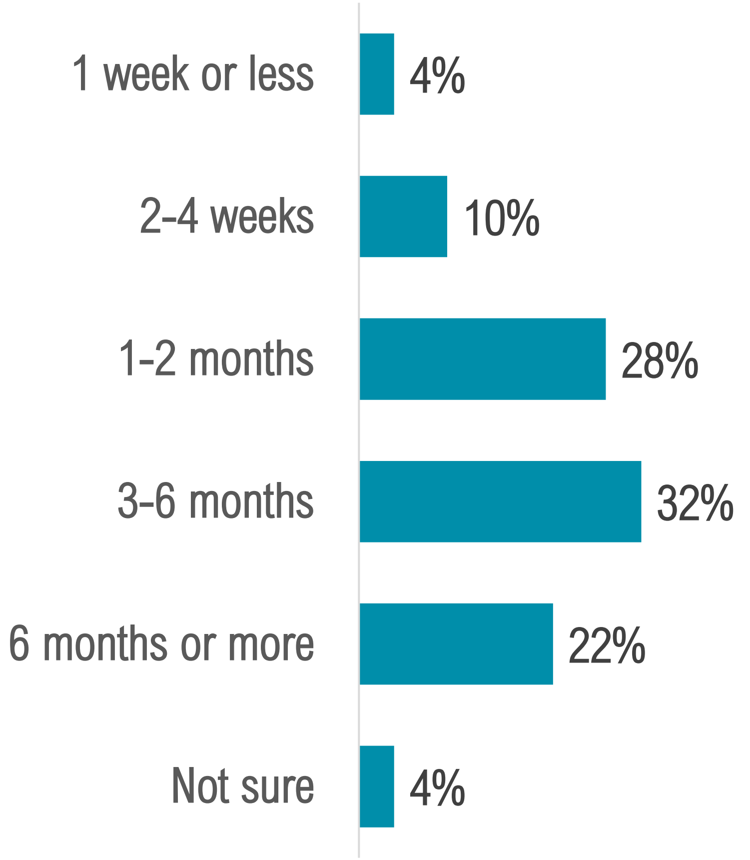
[1]Source: Occupancy Survey

Visitor Journey: Pre-Visit



TRIP PLANNING CYCLE

Over **half** of visitors planned their trip **at least 3 months** in advance, while fewer than **1 in 7** planned their trip **less than a month** in advance.

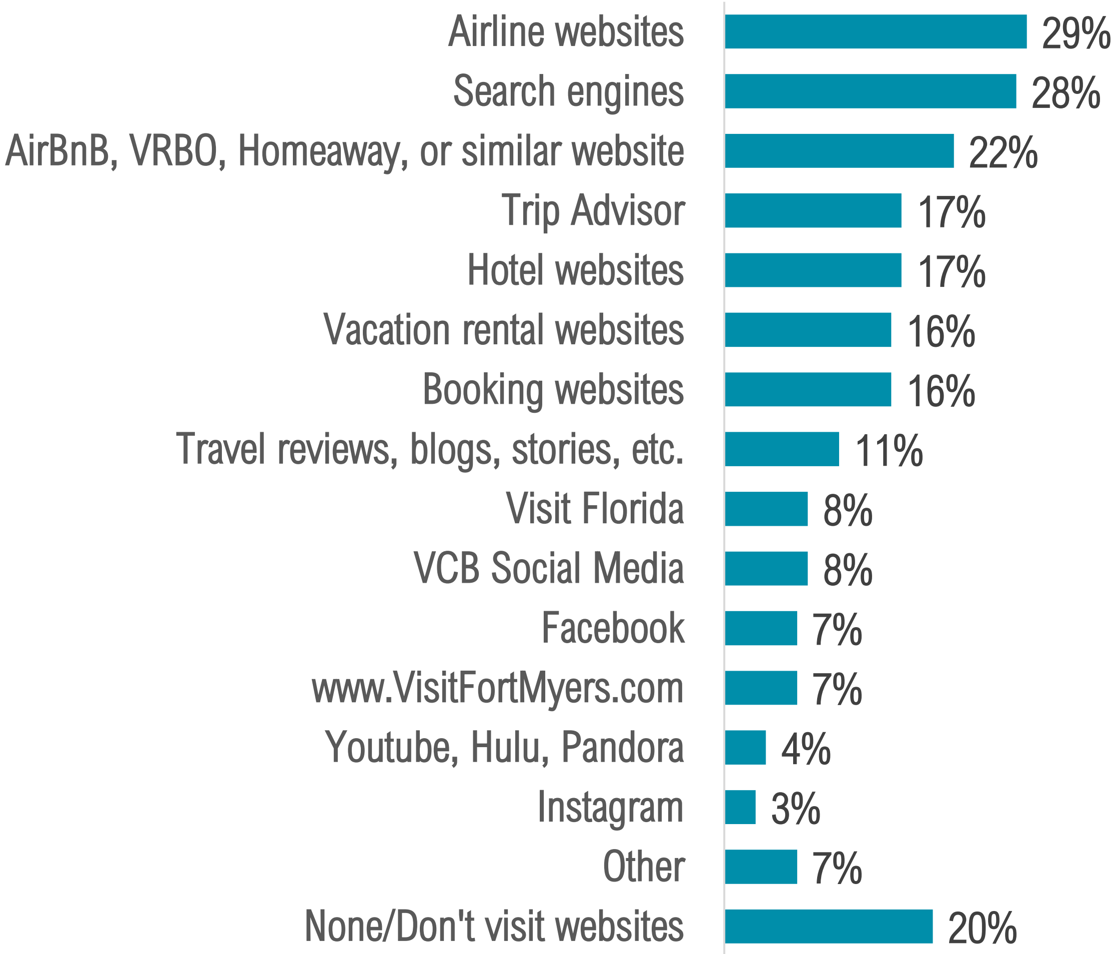


TRIP PLANNING: WEBSITES/APPS USED[1]

4 in 5 visitors used **websites** to plan their trip to the Fort Myers area.

Visitors were more likely to use **airline/hotel websites** and **search engines** to plan their trips.

Over **1 in 5** visitors used **Airbnb, VRBO, Homeaway, or similar website** to plan their trips.



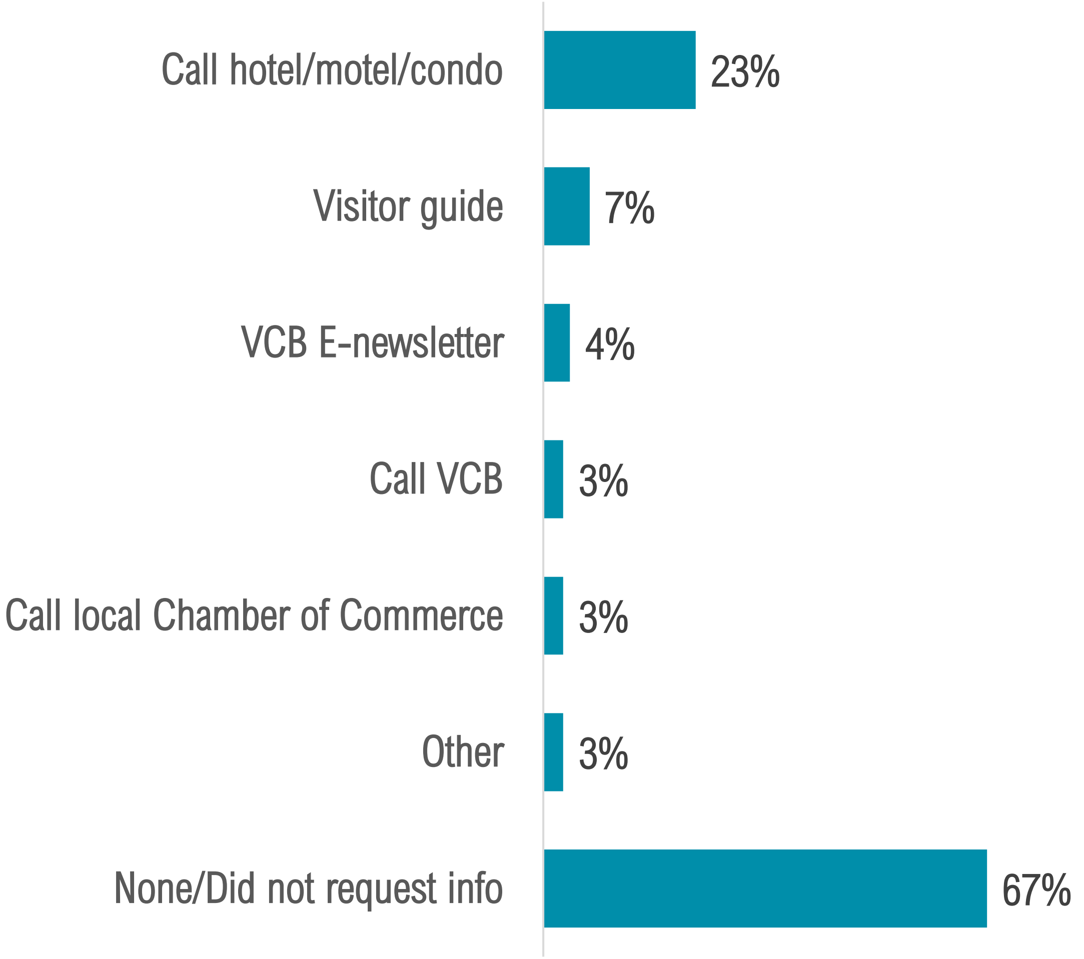
[1]Multiple responses permitted.

TRIP PLANNING: INFORMATION REQUESTS

1 in 3 visitors made **information requests** to plan their trip to the Fort Myers area.

Visitors who sought information prior to their trips were more likely to rely on **hotels/condos.**

Fewer visitors requested information in October-December 2021 compared to 2021

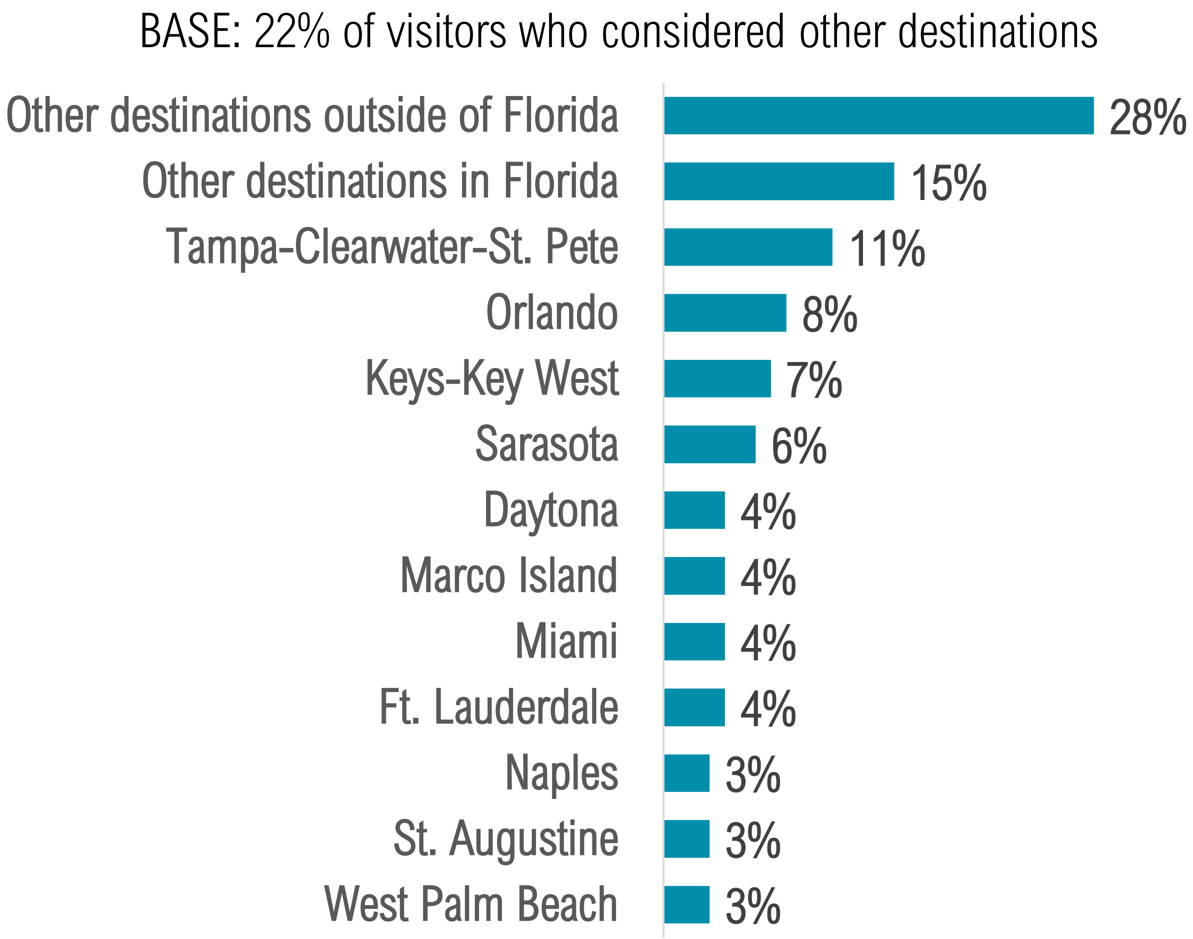


[1]Multiple responses permitted.

TRIP PLANNING: OTHER DESTINATIONS CONSIDERED

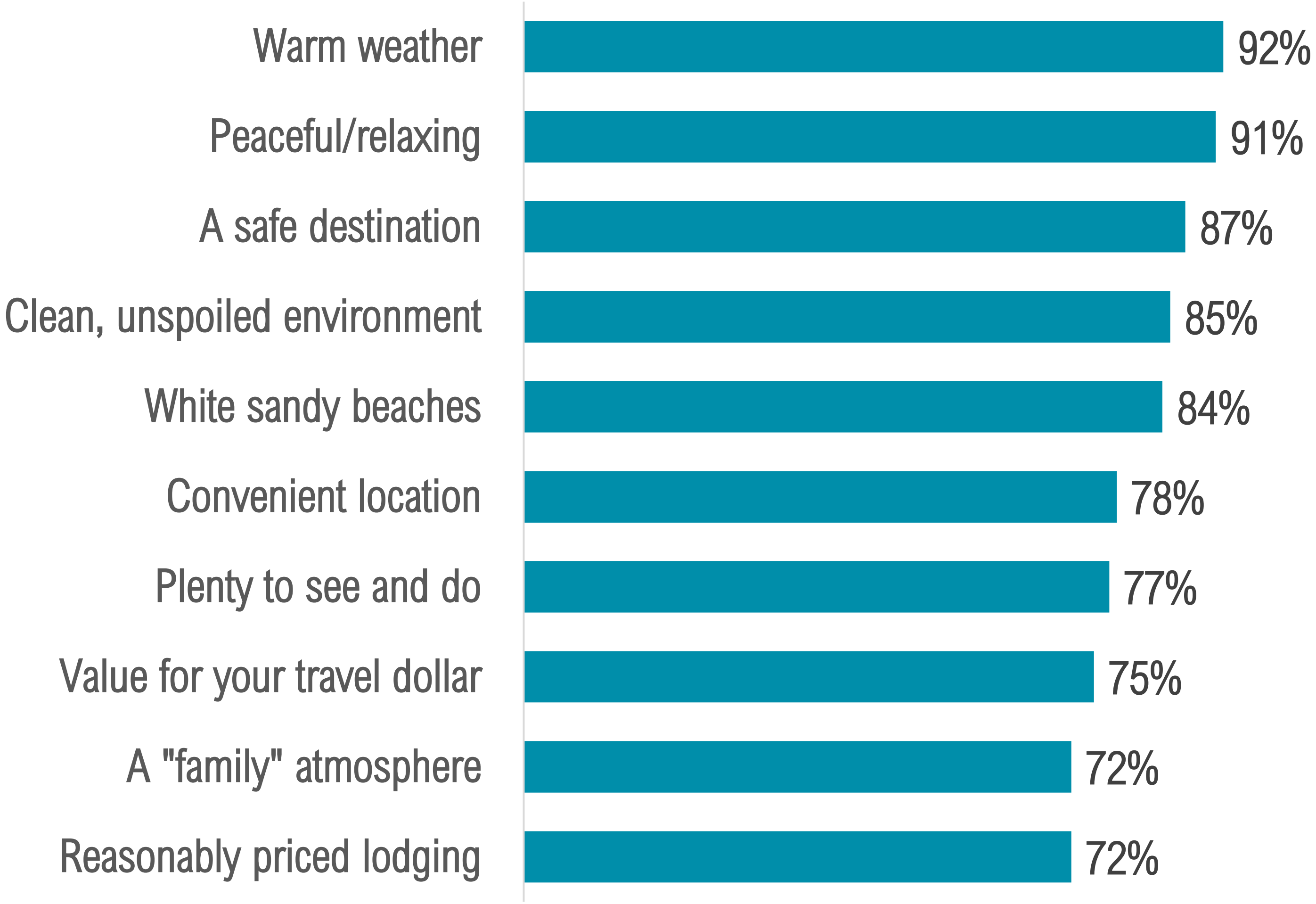
22% of visitors considered choosing other destinations when planning their trips.

Most alternative destinations were in Florida.



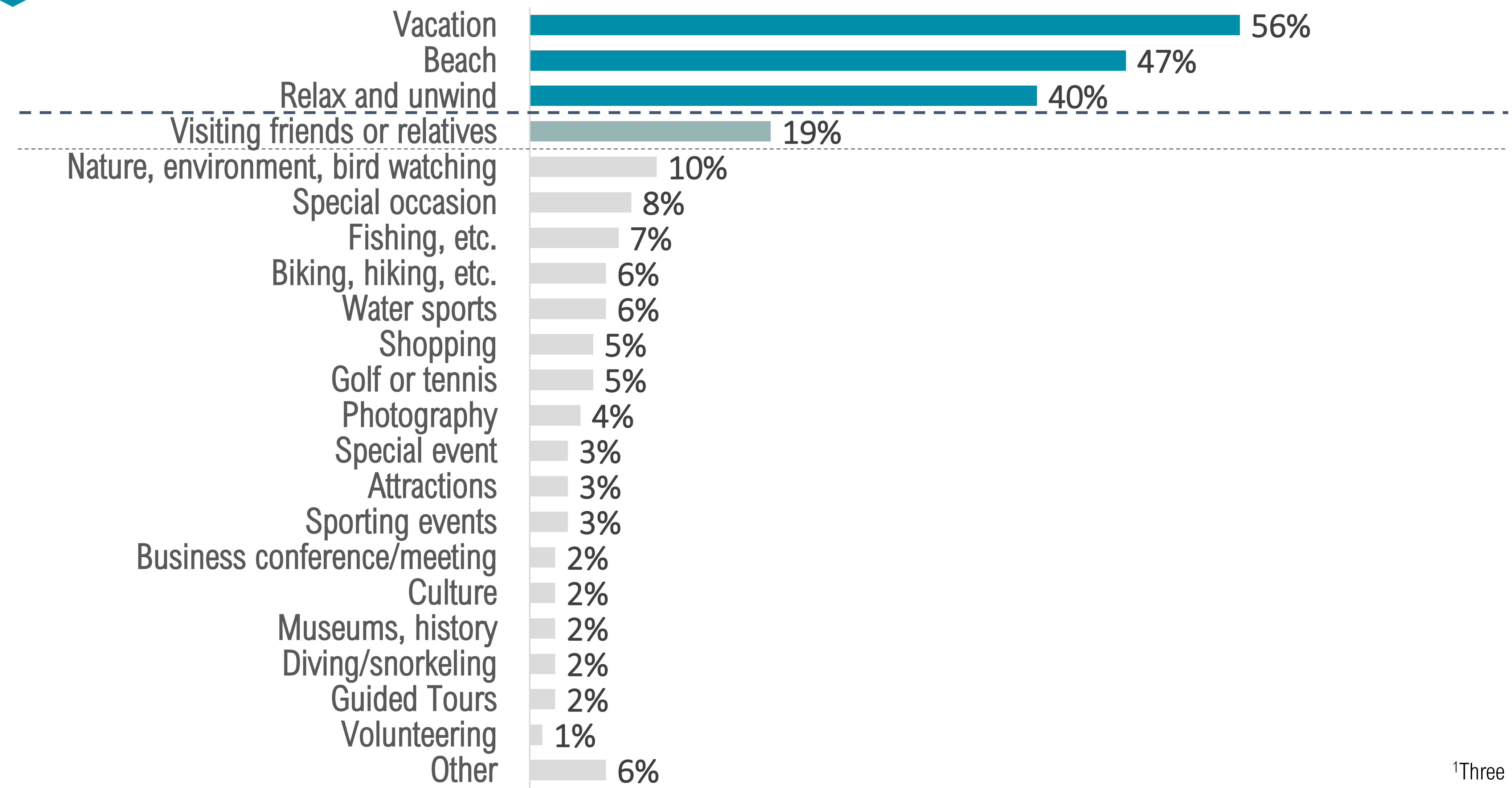
TRIP INFLUENCERS[1]

At least **9 in 10** visitors were heavily influenced by the Fort Myers area 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]



[1]Three responses permitted.

PROMOTIONS[1]

33% of visitors **recalled promotions** in the past 6 months for the Fort Myers area.

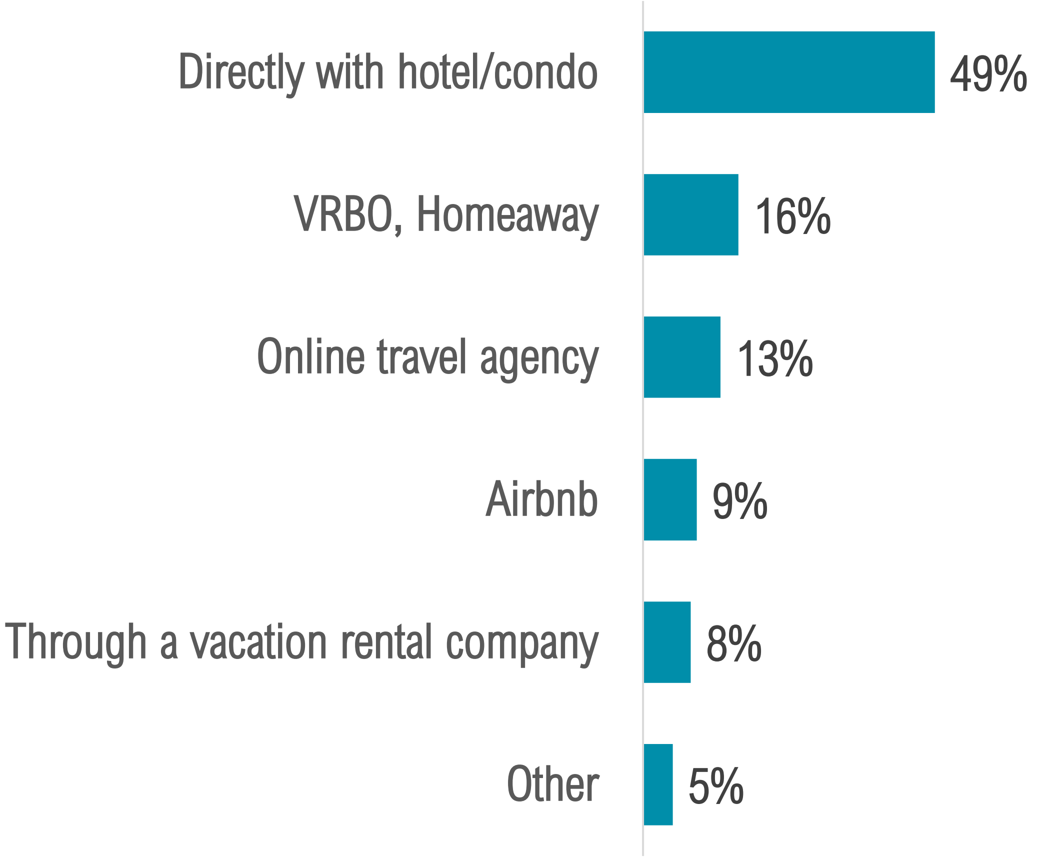
This influenced 16% of all visitors to come to the Fort Myers area.

BASE: 33% of visitors who recalled promotions

[1]Multiple responses permitted.

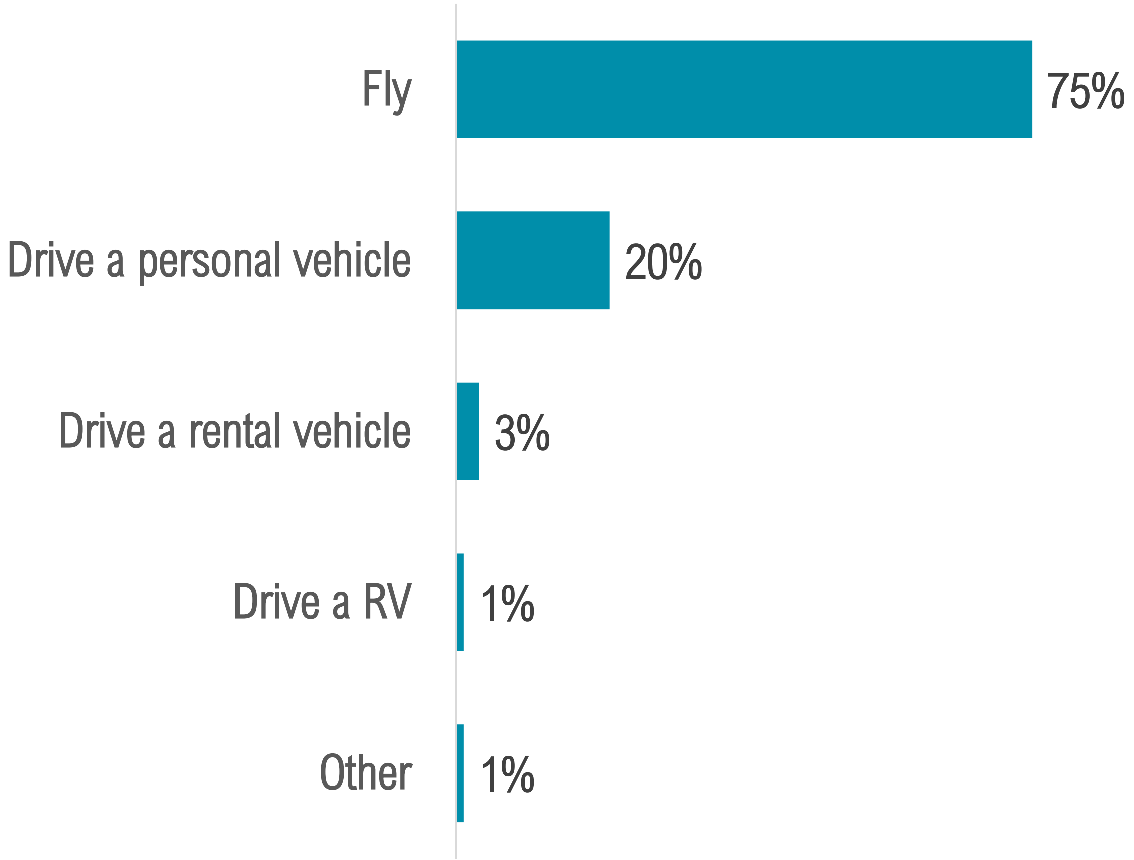
BOOKING

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



TRANSPORTATION

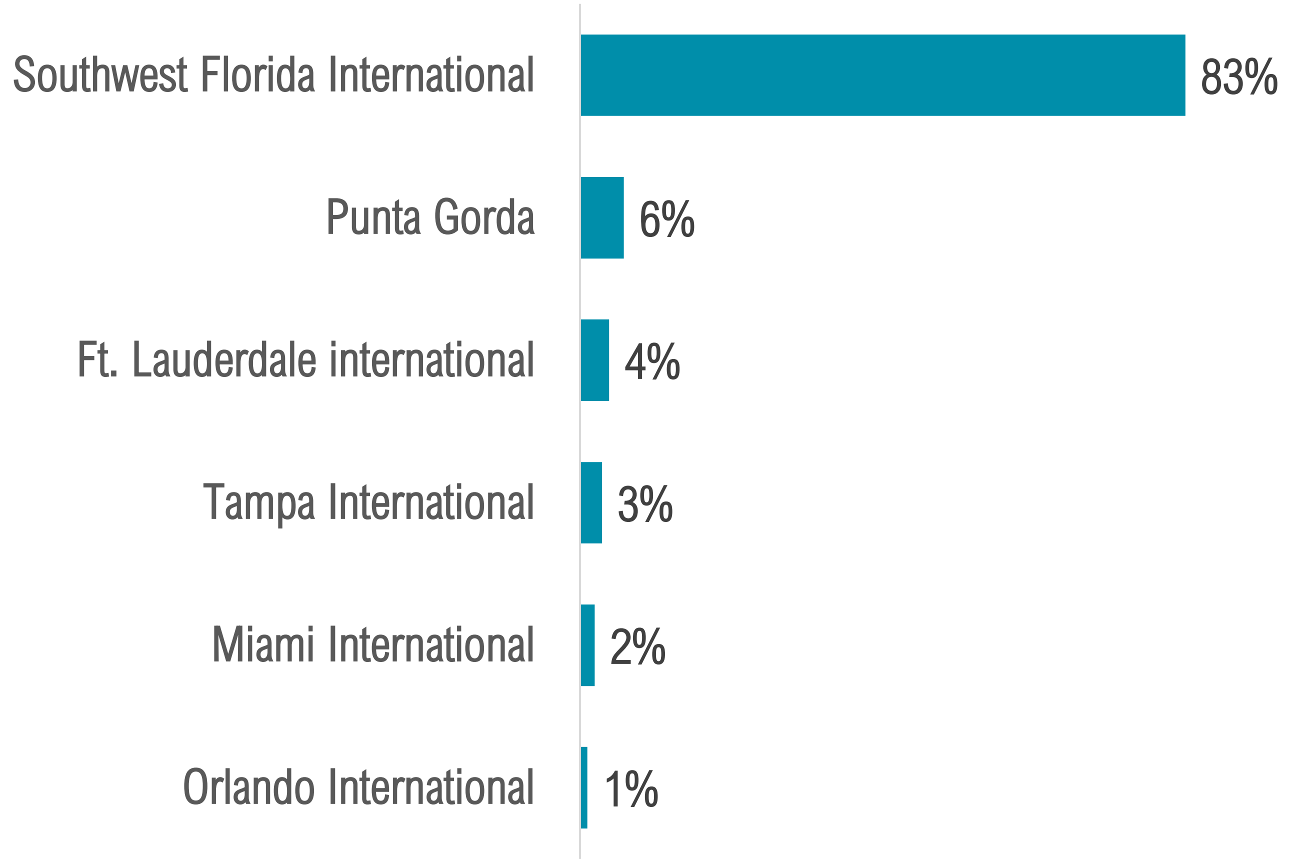
3 in 4 visitors **flew** to the Fort Myers area.



AIRPORT

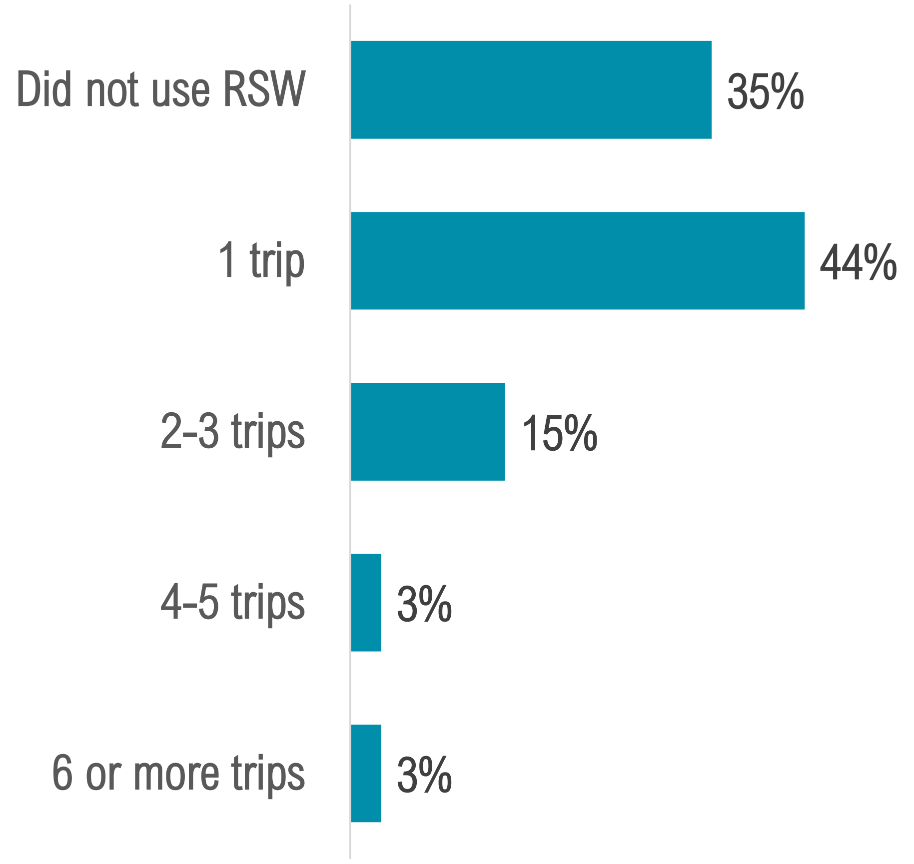
4 in 5 visitors who flew to the Fort Myers area came through RSW.

BASE: 75% of visitors who flew



USE OF RSW IN THE PAST YEAR

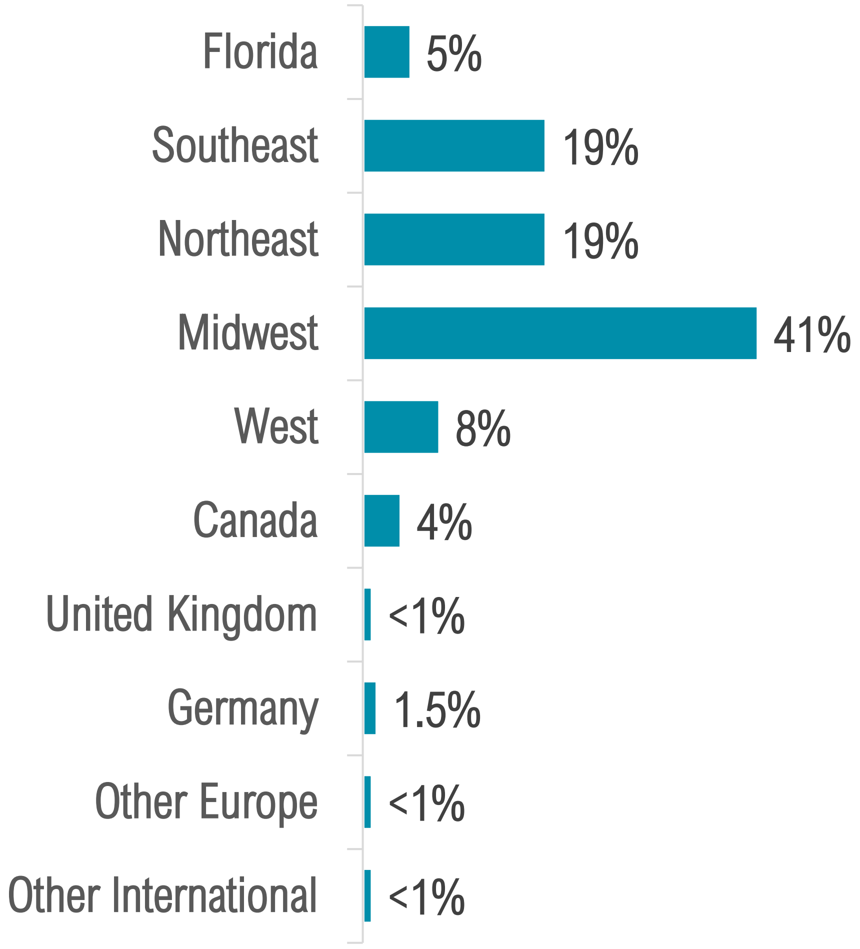
65% of visitors used RSW **at least once** in the past year.

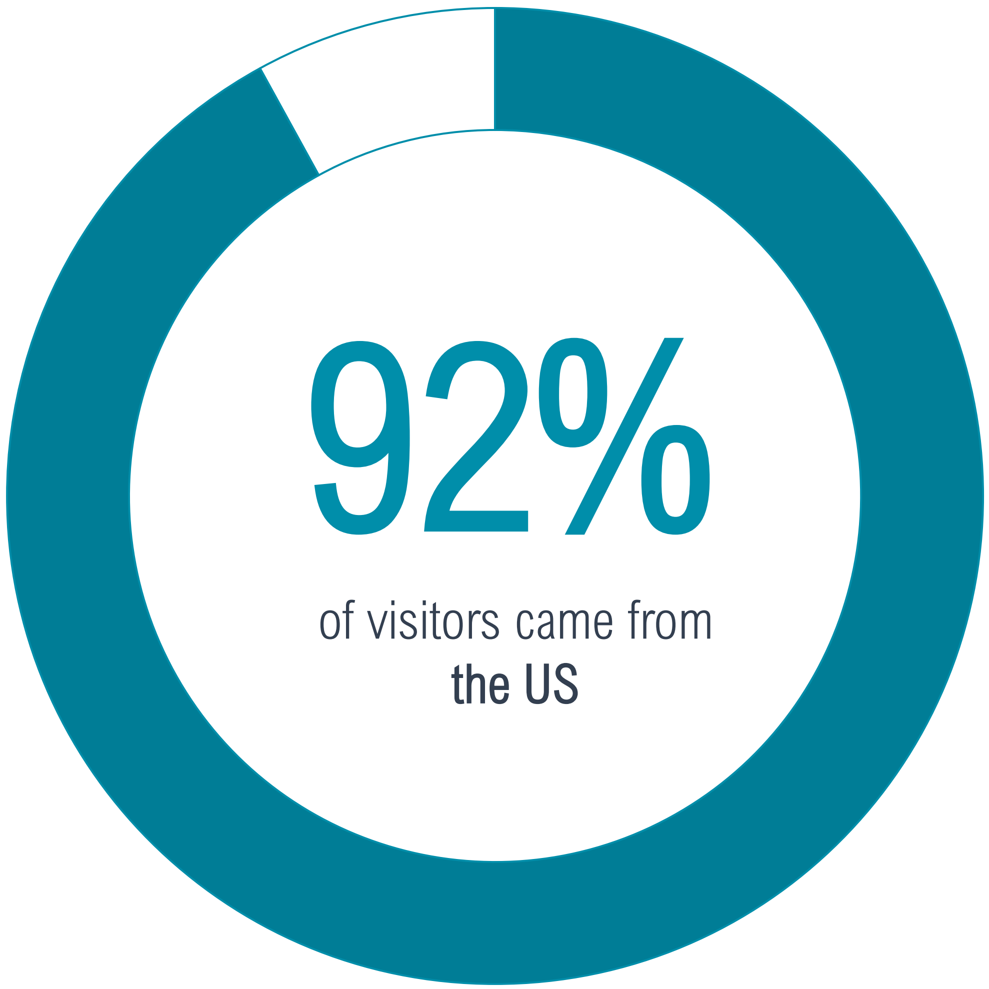


VISITOR JOURNEY: TRAVEL PARTY PROFILE

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

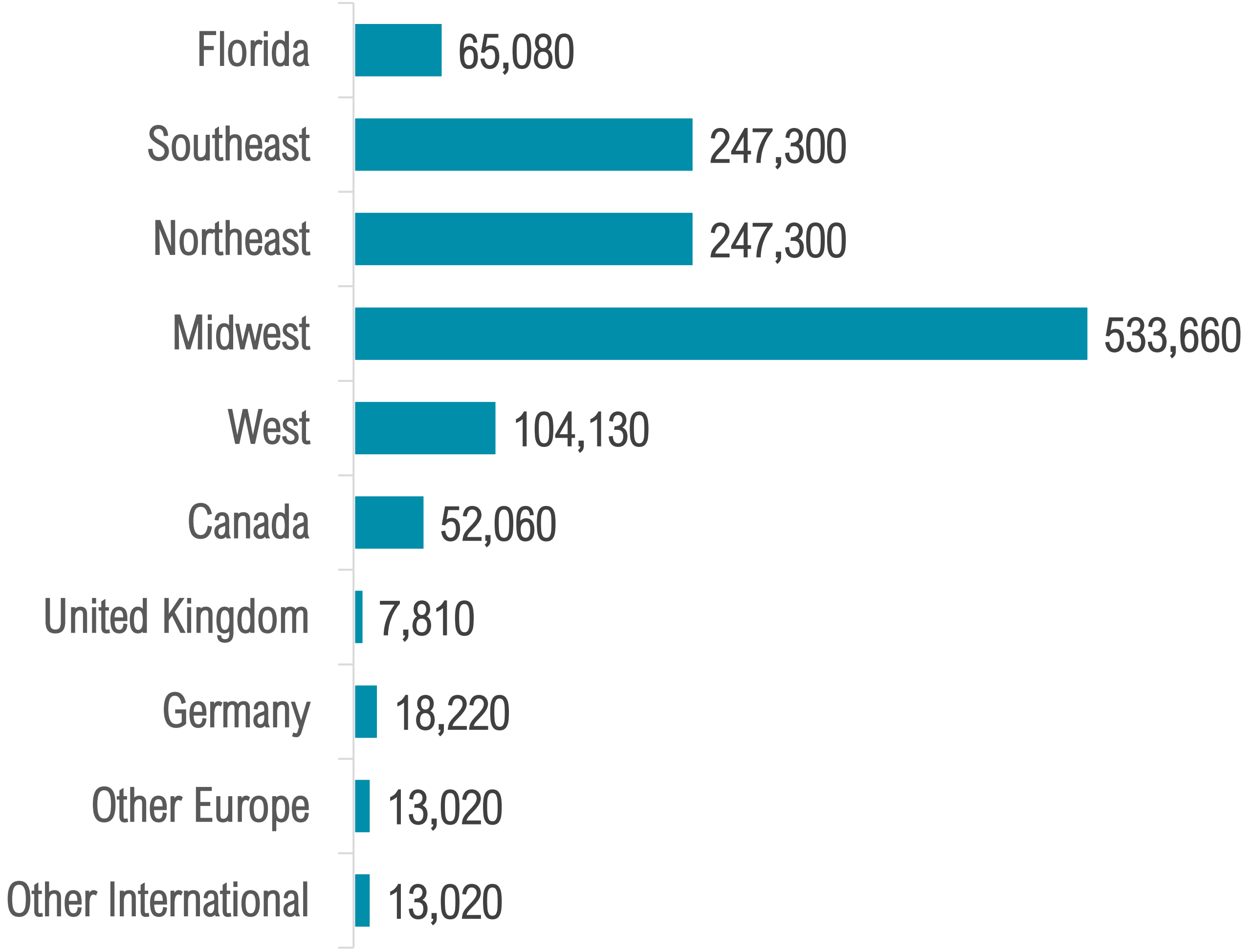
ORIGIN[1]



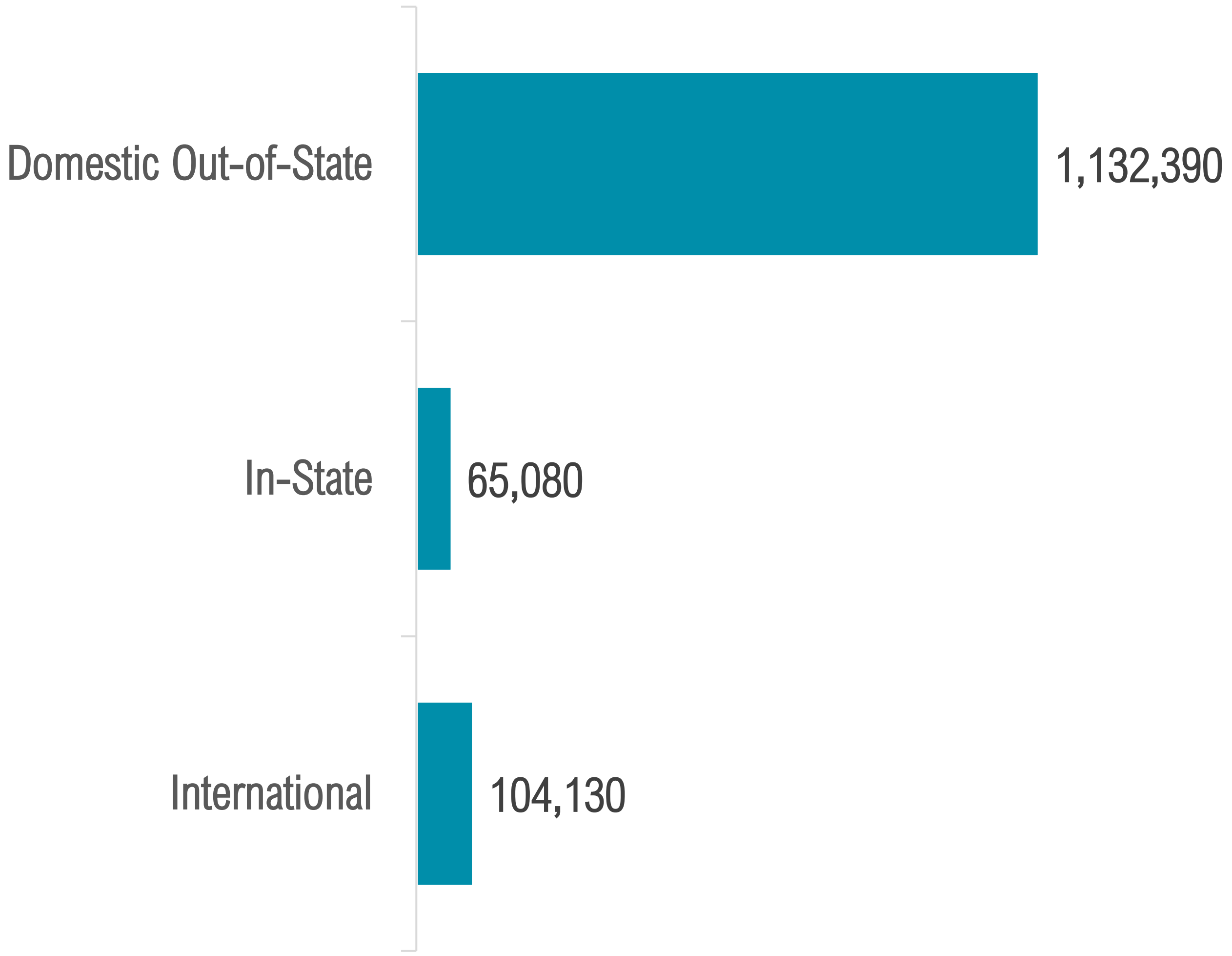


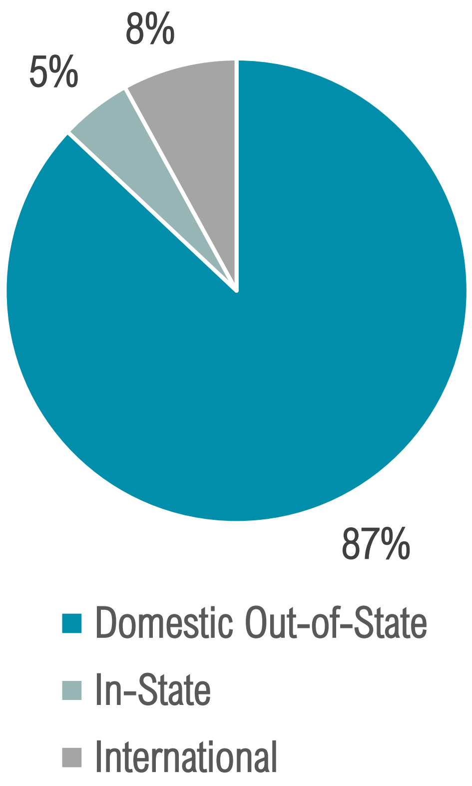
[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers.

NUMBER OF VISITORS BY ORIGIN



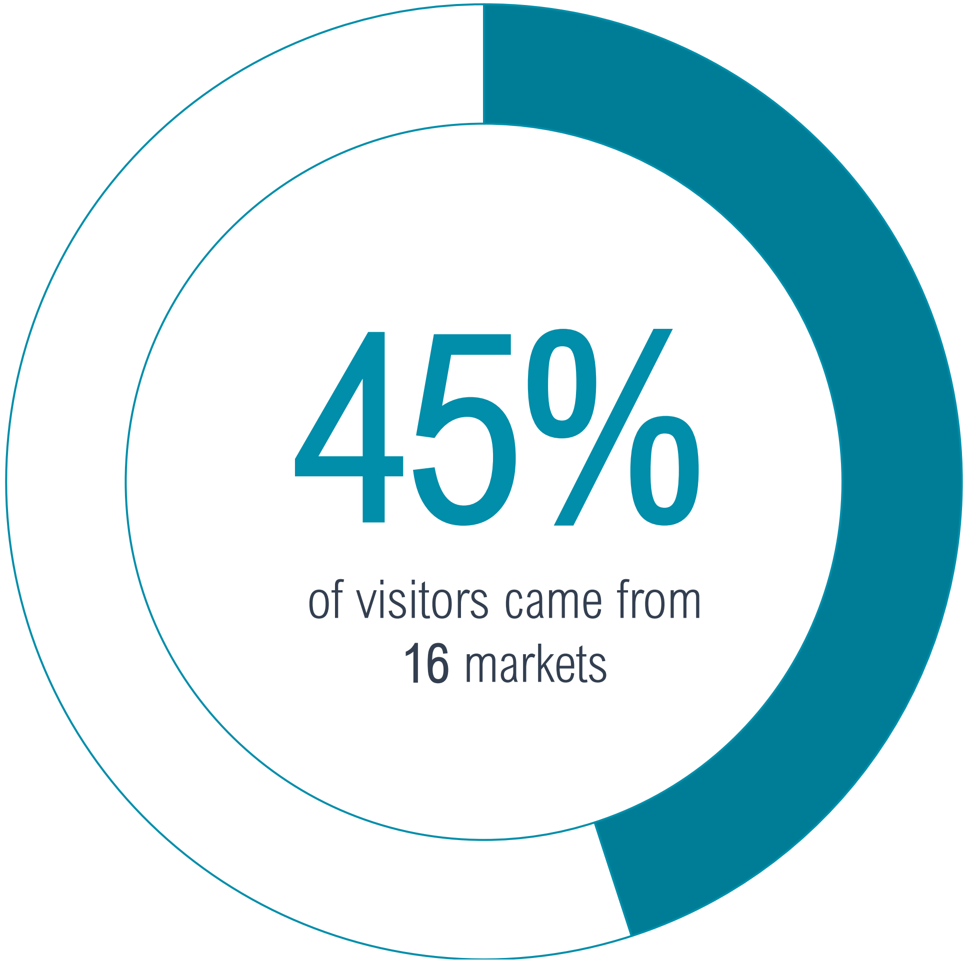
NUMBER OF VISITORS BY ORIGIN





ORIGIN MARKETS[1]

Market	Percentage of Visitors
New York City	5%
Chicago	4%
Minneapolis	4%
Atlanta	4%
Cleveland	3%
Washington DC-Baltimore	3%
Boston	3%
Detroit	3%
Cincinnati	2%
Pittsburgh	2%
Indianapolis	2%
Milwaukee	2%
Columbus, OH	2%
Denver-Aurora-Broomfield, CO	2%
St. Louis	2%
Green Bay-Appleton, WI	2%



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

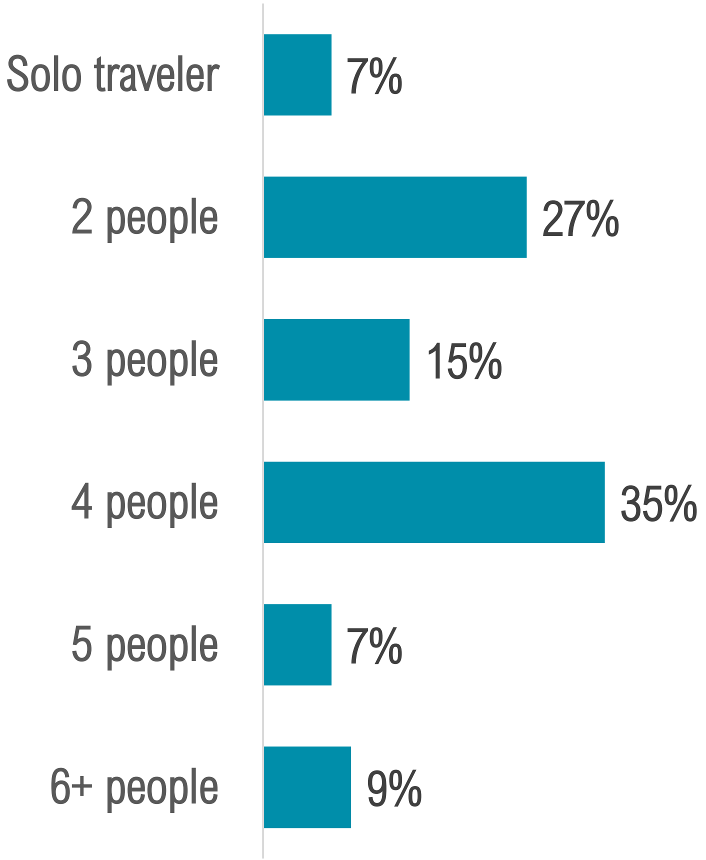
TRAVEL PARTY SIZE AND COMPOSITION

Travel Party Size

Visitors traveled in a party composed of **3.0**[1] **people**.

Travel with Children

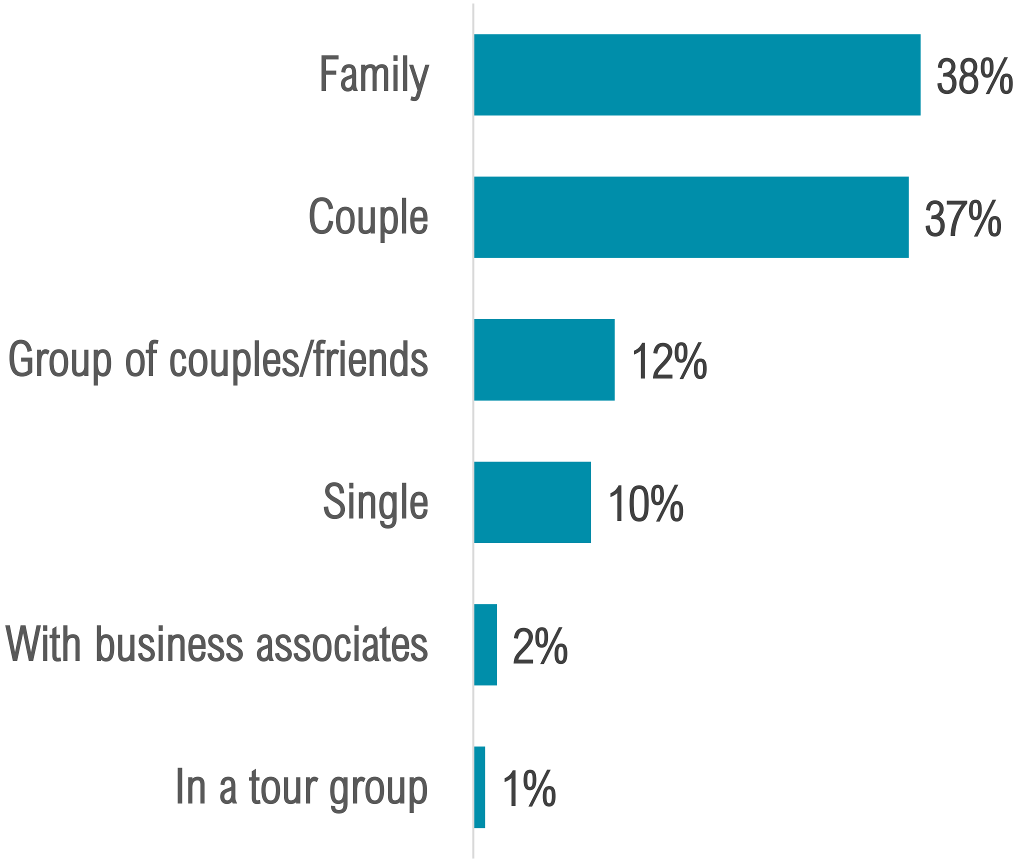
30% of visitors **traveled with children** under the age of 18.



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

TRAVEL PARTY TYPE

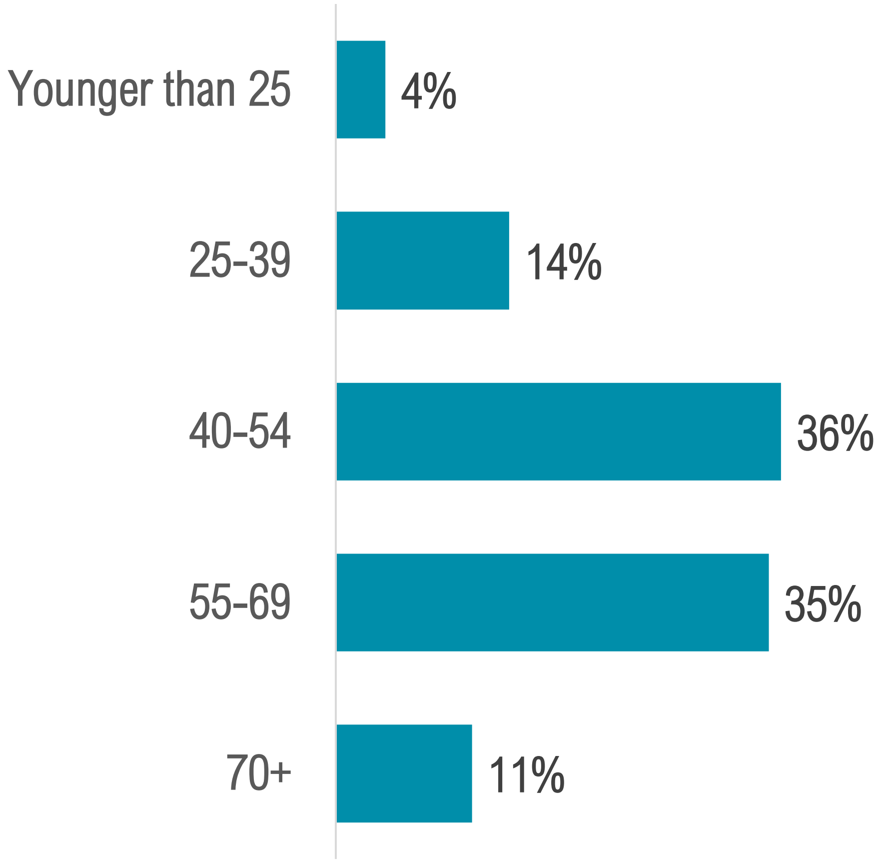
38% of visitors traveled as a **family**, while a similar percentage traveled as a **couple**.



AGE

Average Age

The average age of Oct – Dec visitors was **52 years old.**

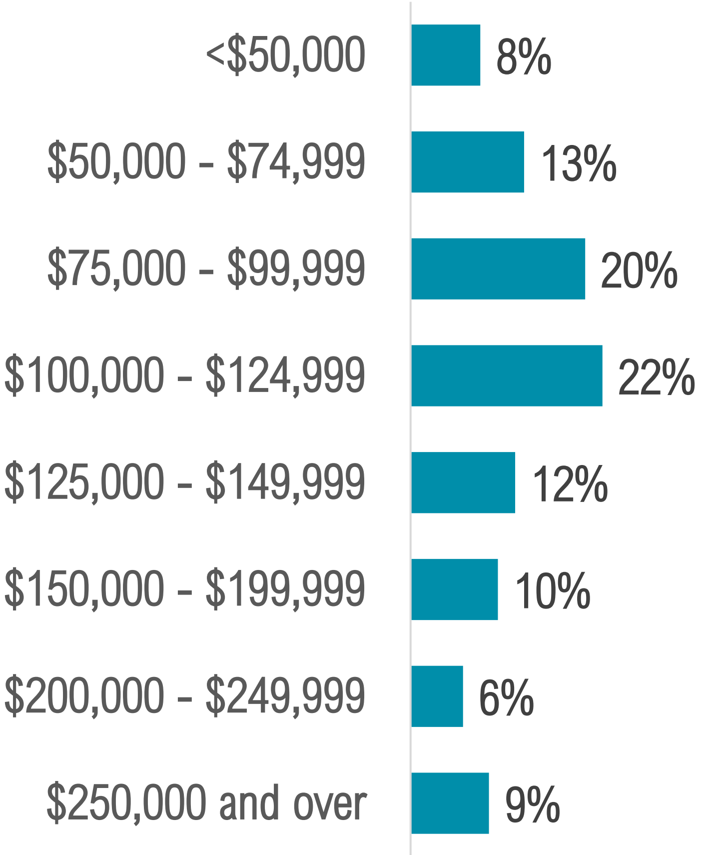


HOUSEHOLD INCOME

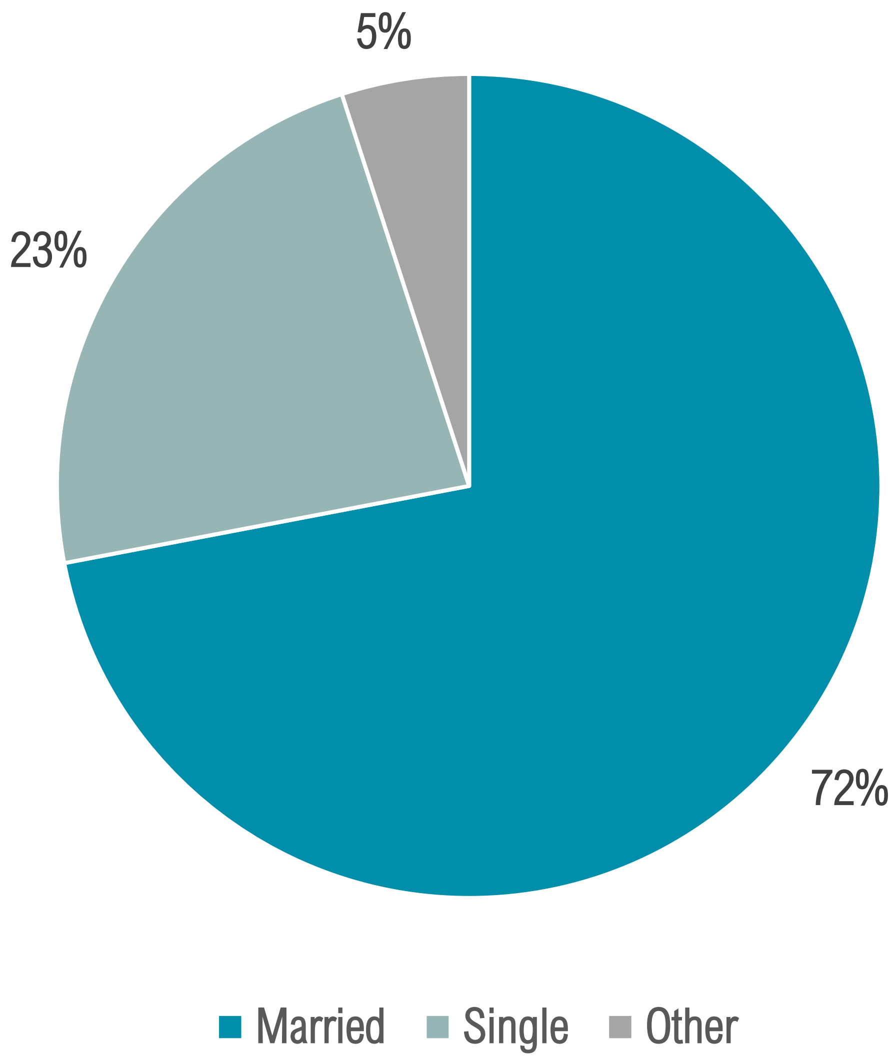
Median Household Income

Oct – Dec visitors had a median household income of **$110,200.**

15% of visitors had a household income in excess of **$200,000.**



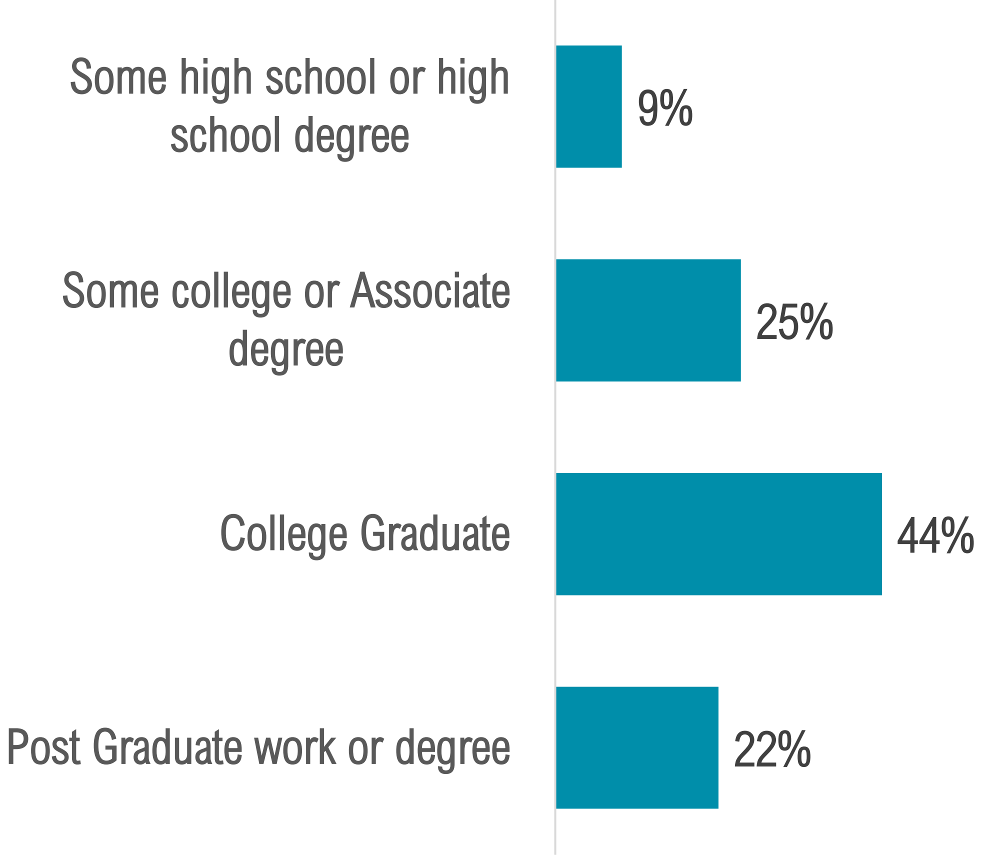
MARITAL STATUS



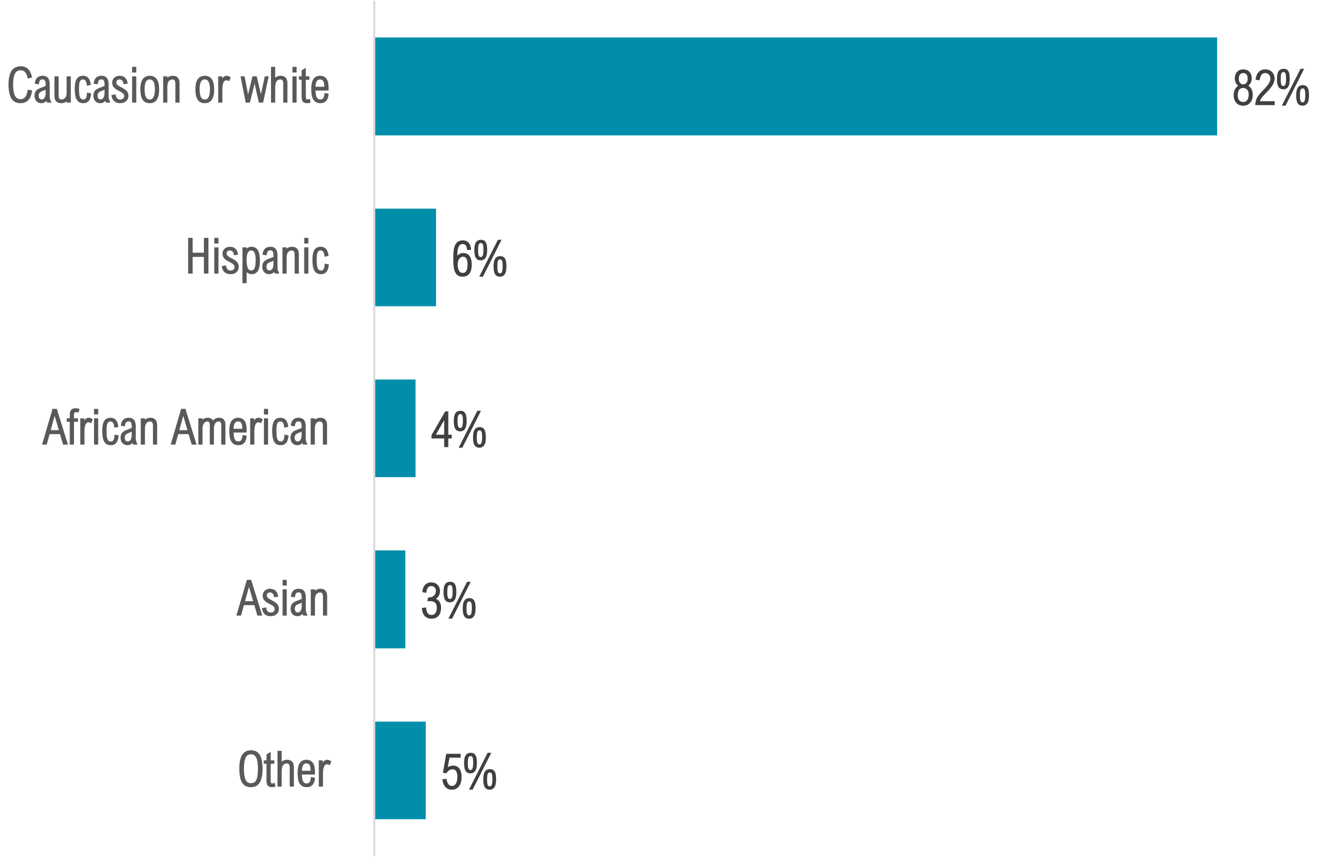
EDUCATION

College Education

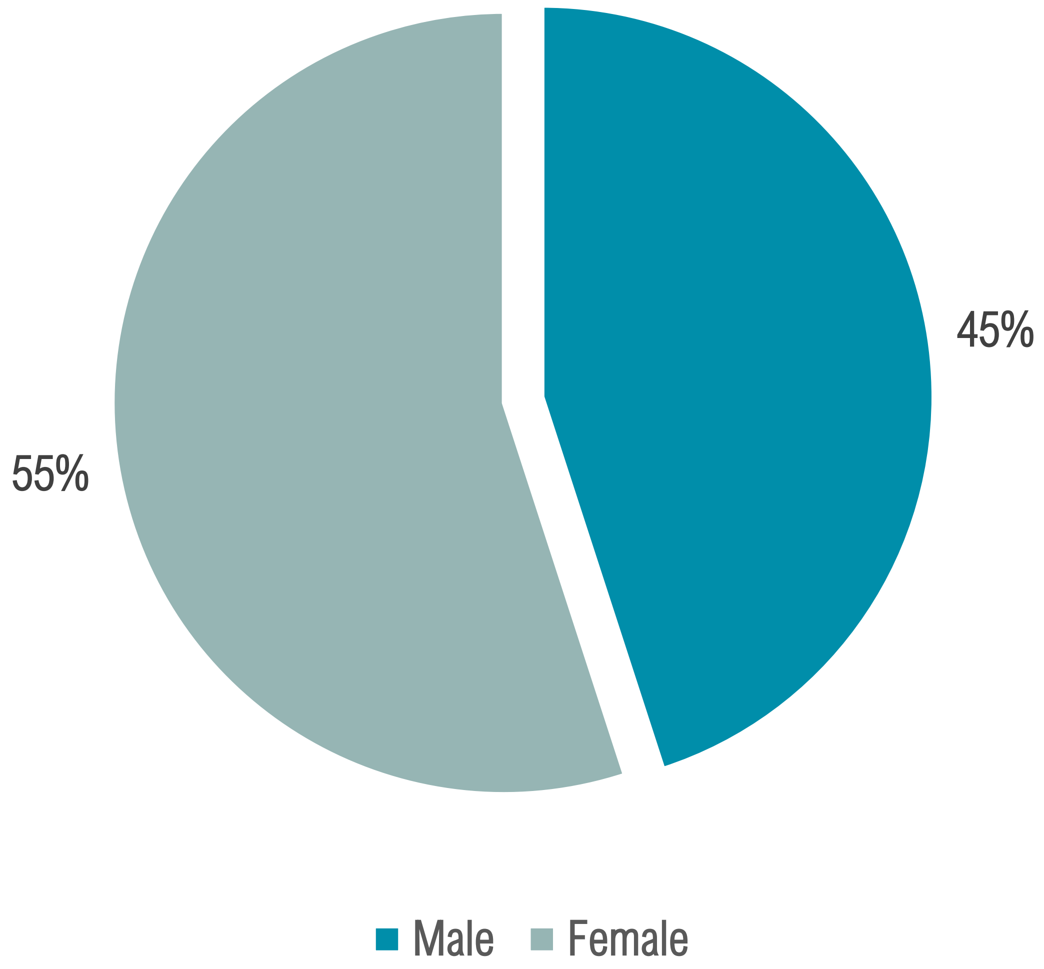
66% of Oct – Dec visitors were college graduates.



RACE/ETHNICITY



GENDER

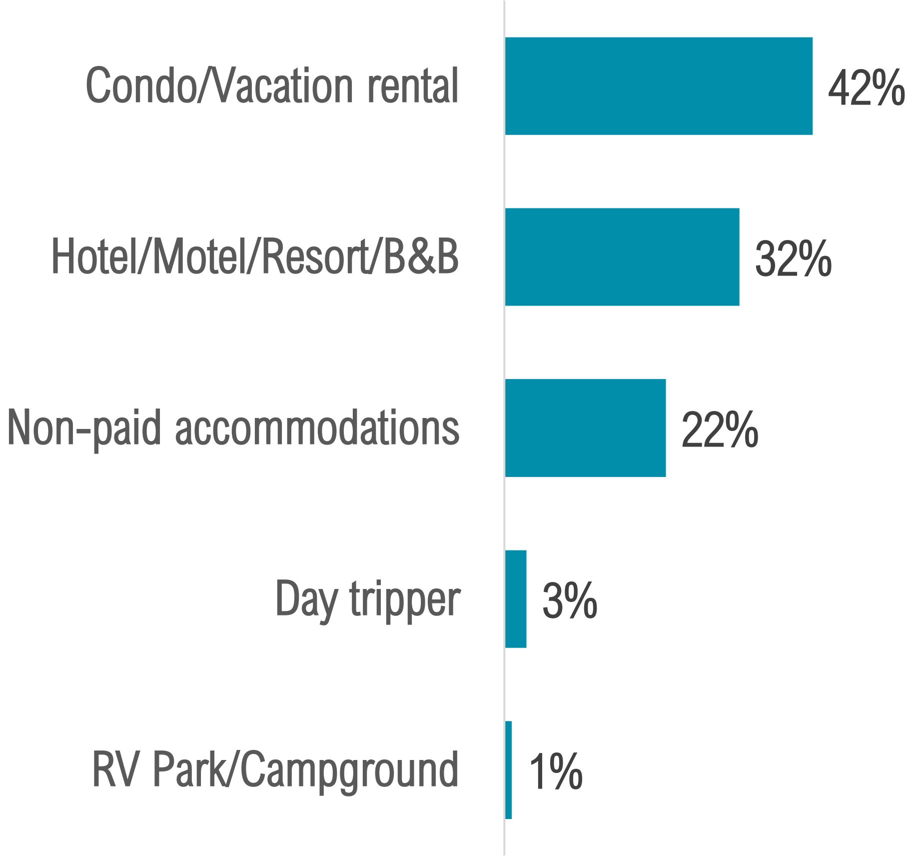


VISITOR JOURNEY: TRIP EXPERIENCE

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

ACCOMMODATIONS

3 in 4 visitors stayed in **paid accommodations** such as a hotel/motel/resort/B&B, condo/vacation rental, or a RV Park/Campground.



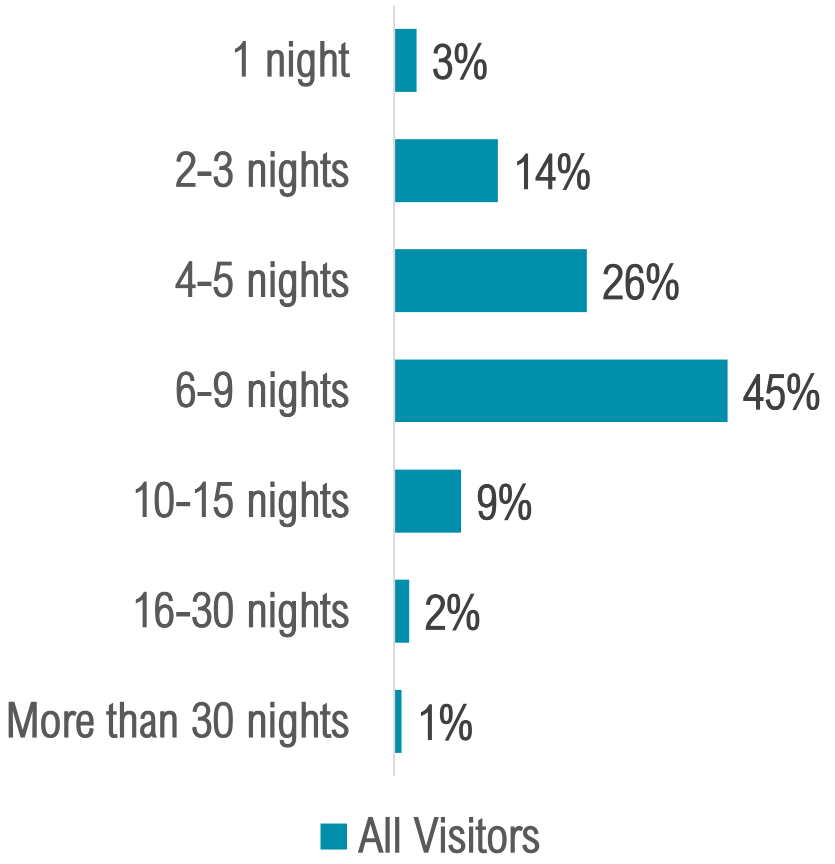
NIGHTS STAYED

All Visitors

Visitors spent **5.7[1] nights** in the Fort Myers area.

Visitors Staying in Paid Accommodations

Visitors staying in paid accommodations spent **5.4[2] nights** in the Fort Myers area.

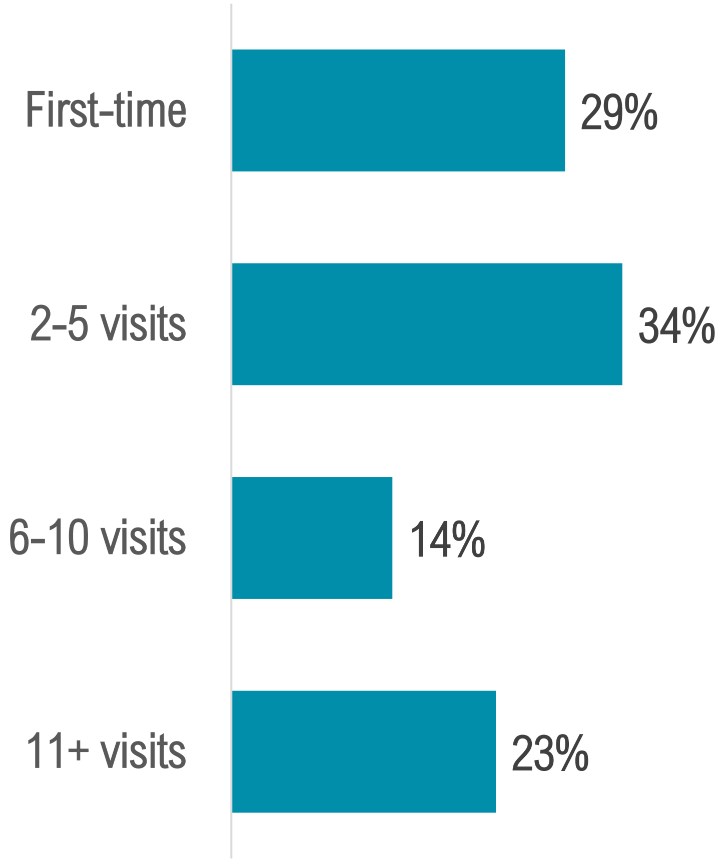


[1]When including extended stay visitors, average nights stayed for all visitors was 7.1 nights. Source: Visitor Tracking Survey

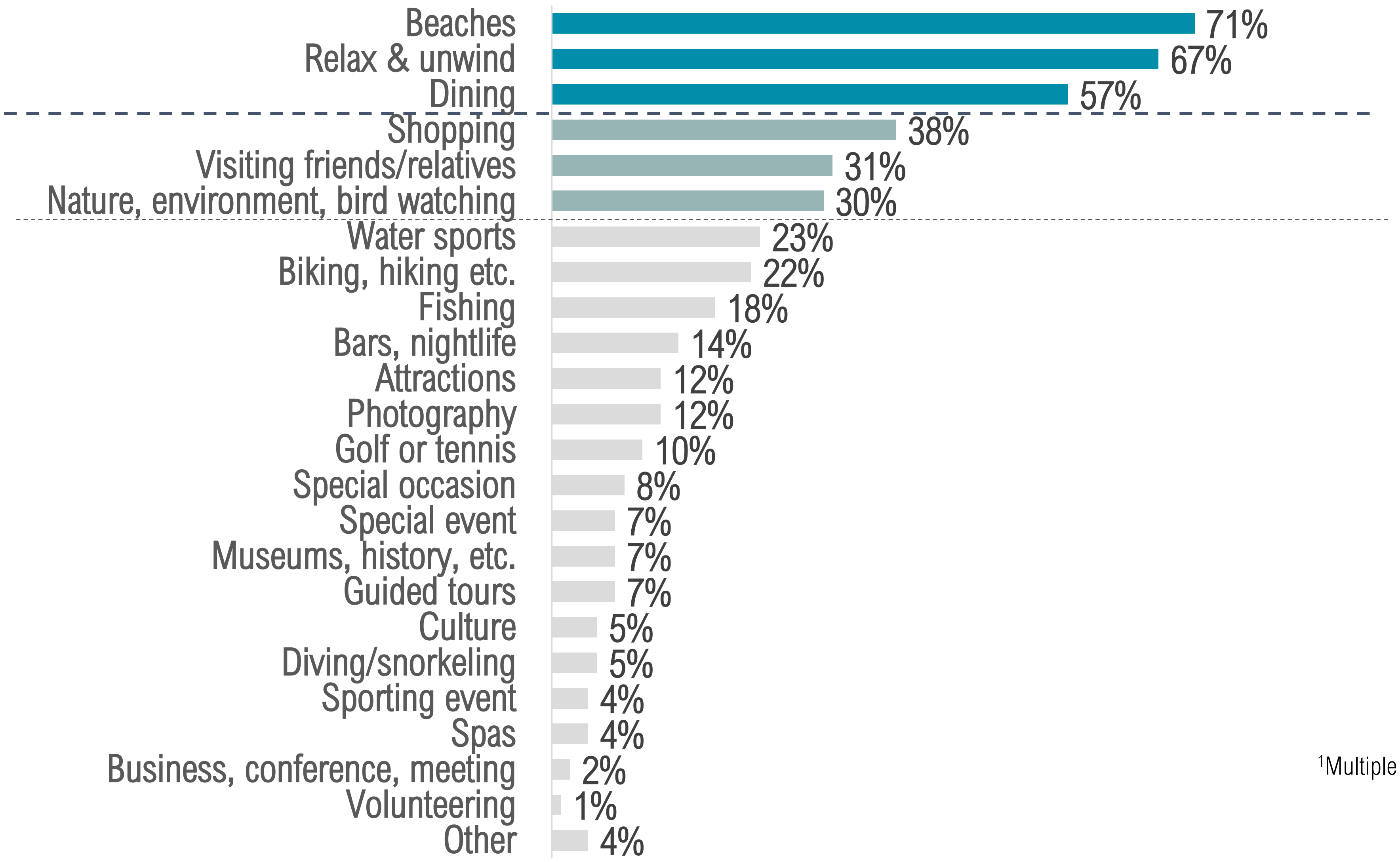
[2]When including extended stay visitors, average nights stayed for visitors staying in paid accommodations was 7.0 nights. Source: Visitor Tracking Survey

FIRST TIME AND EXPERIENCED VISITORS

Nearly 3 in 10 visitors were visiting for the first time, while nearly 1 in 4 were highly loyal visitors, having visited more than 10 times.



VISITOR ACTIVITIES[1]

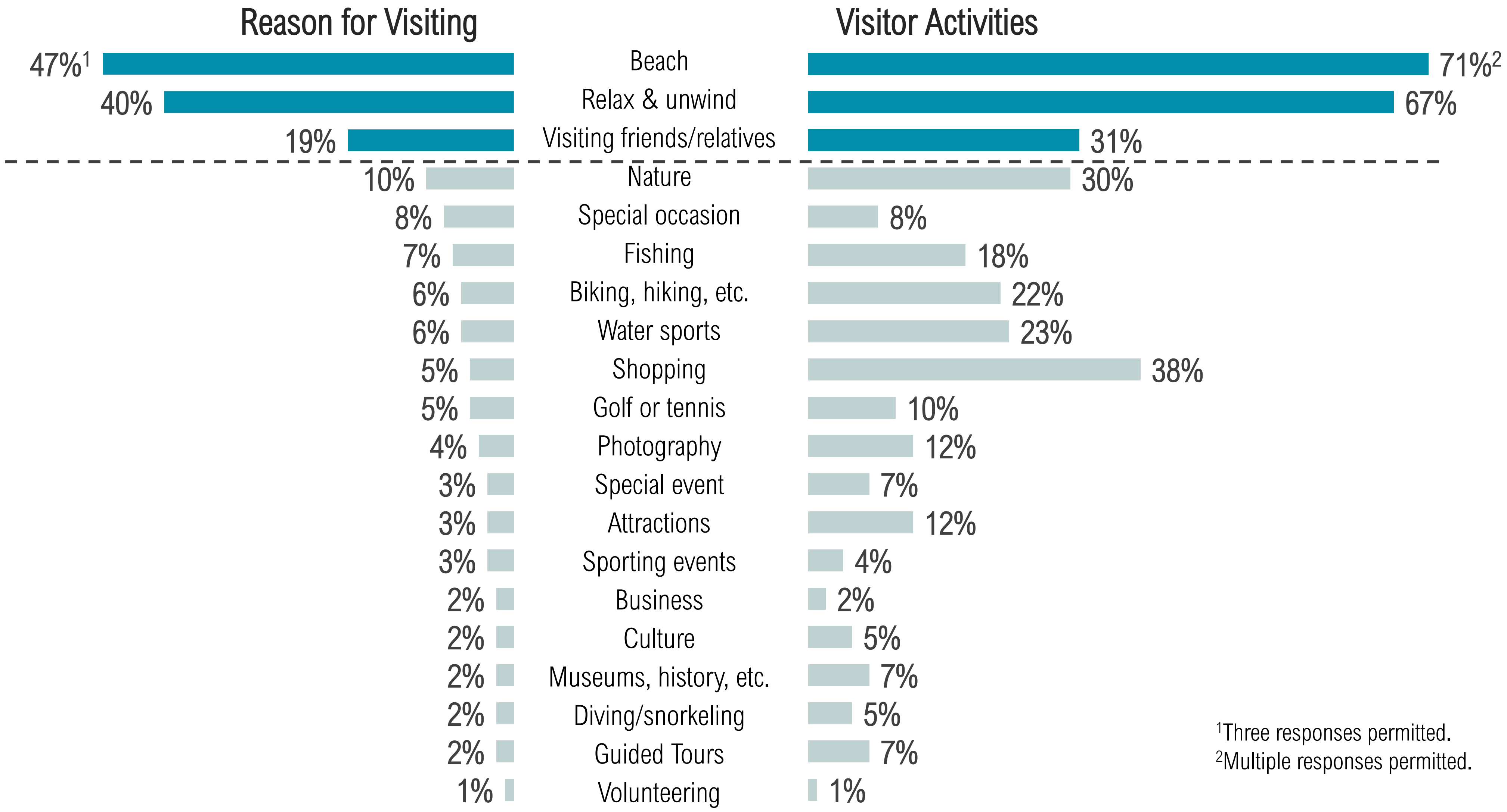


[1]Multiple responses permitted.

REASON FOR VISITING VS. VISITOR ACTIVITIES

Key Reasons for Visiting

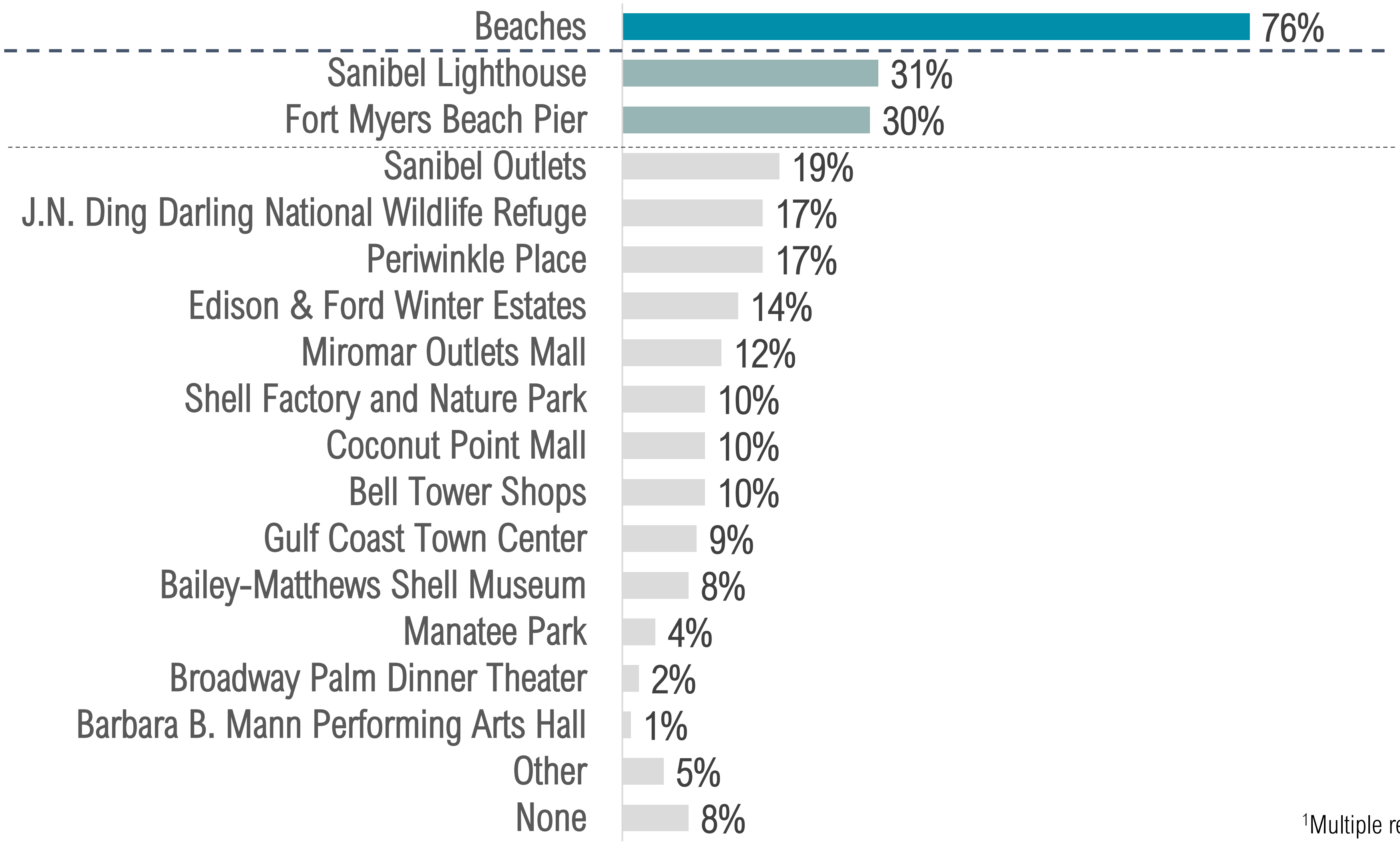
Trip Enhancements



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

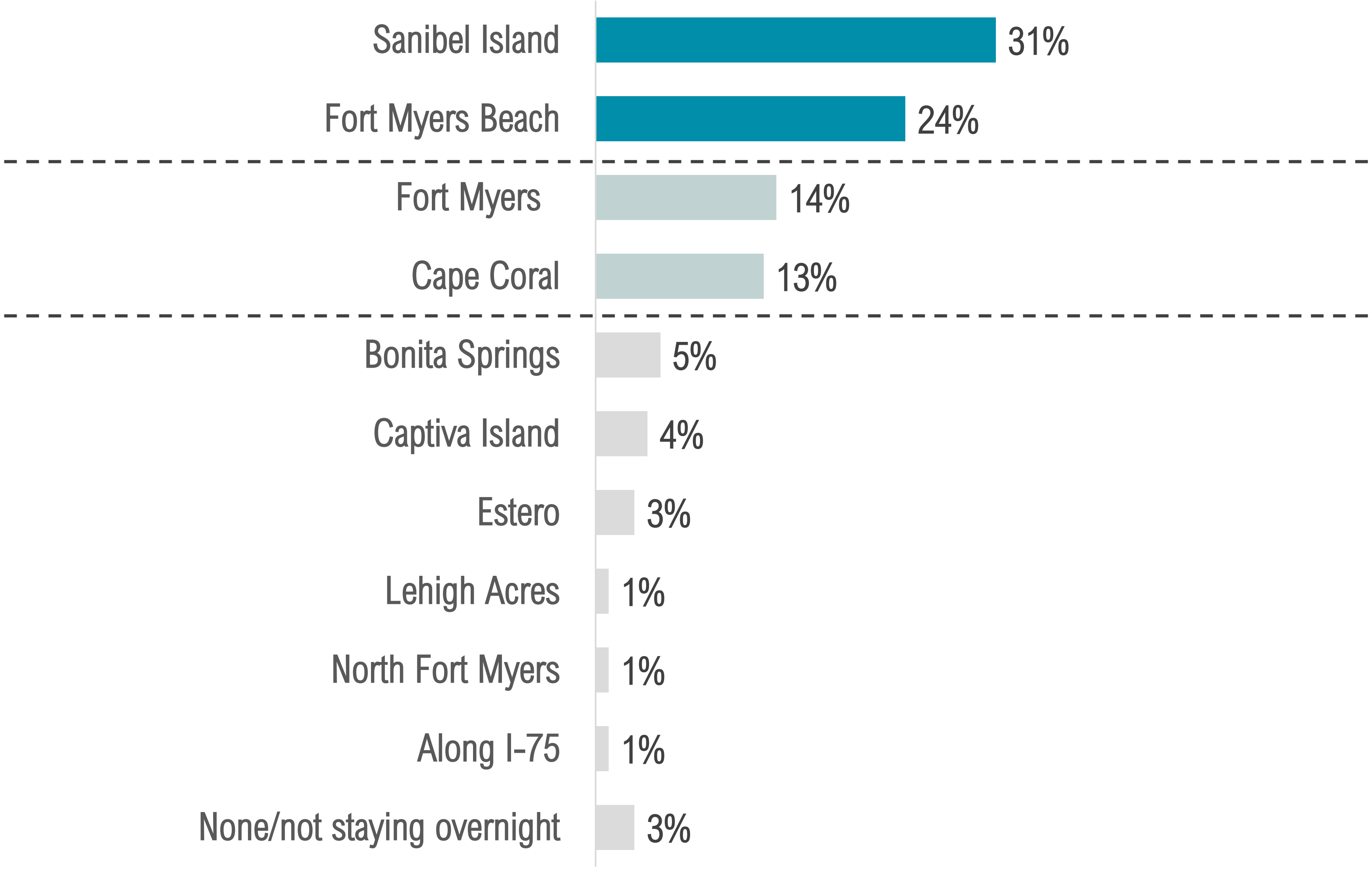
Trip Experience
Oct – Dec 2021

ATTRACTIONS VISITED[1]



[1]Multiple responses permitted.

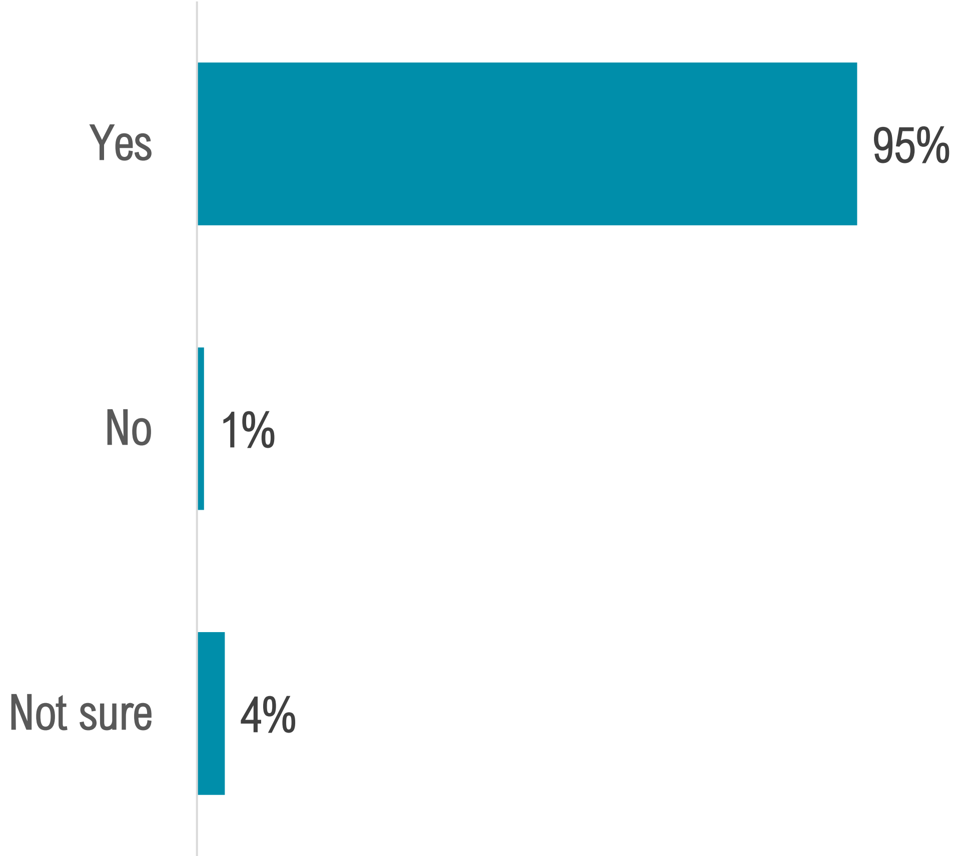
COMMUNITY STAYED



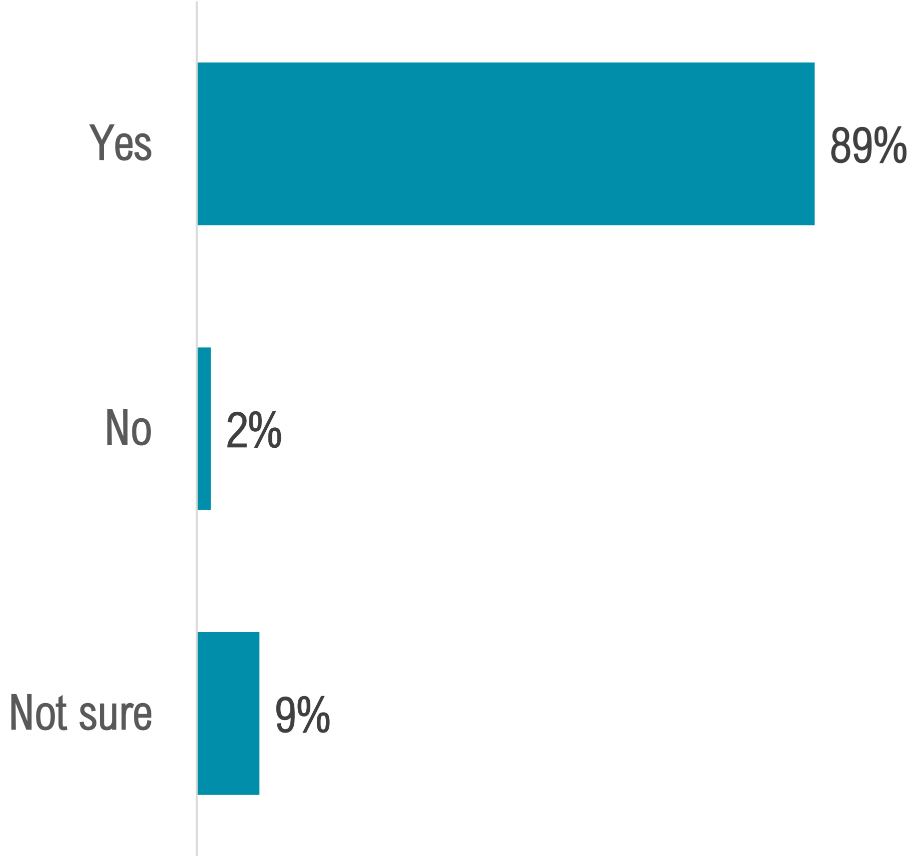
VISITOR JOURNEY: POST-TRIP EVALUATION

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

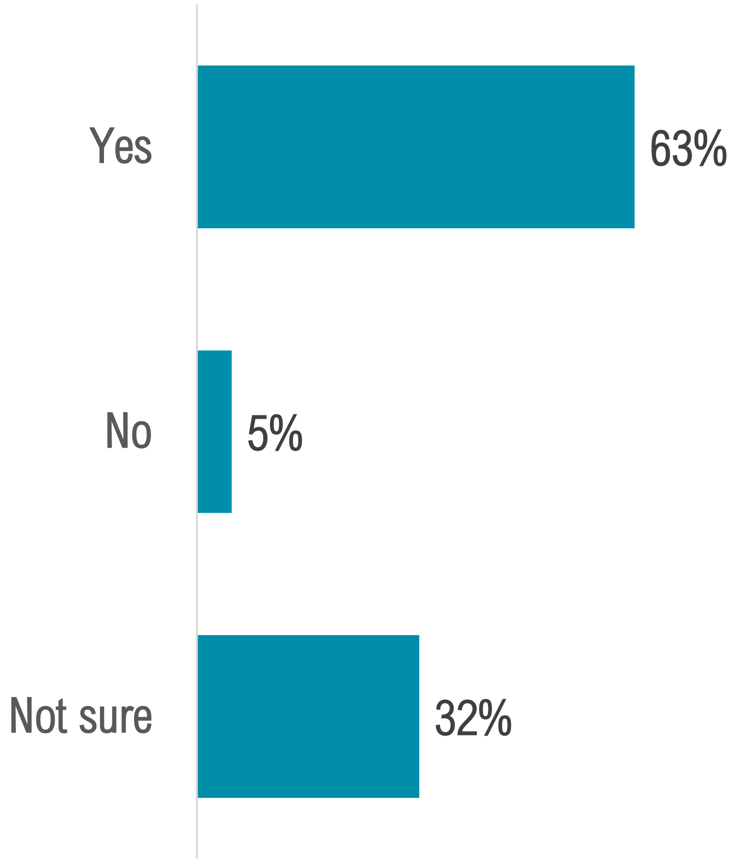
LIKELY TO RECOMMEND



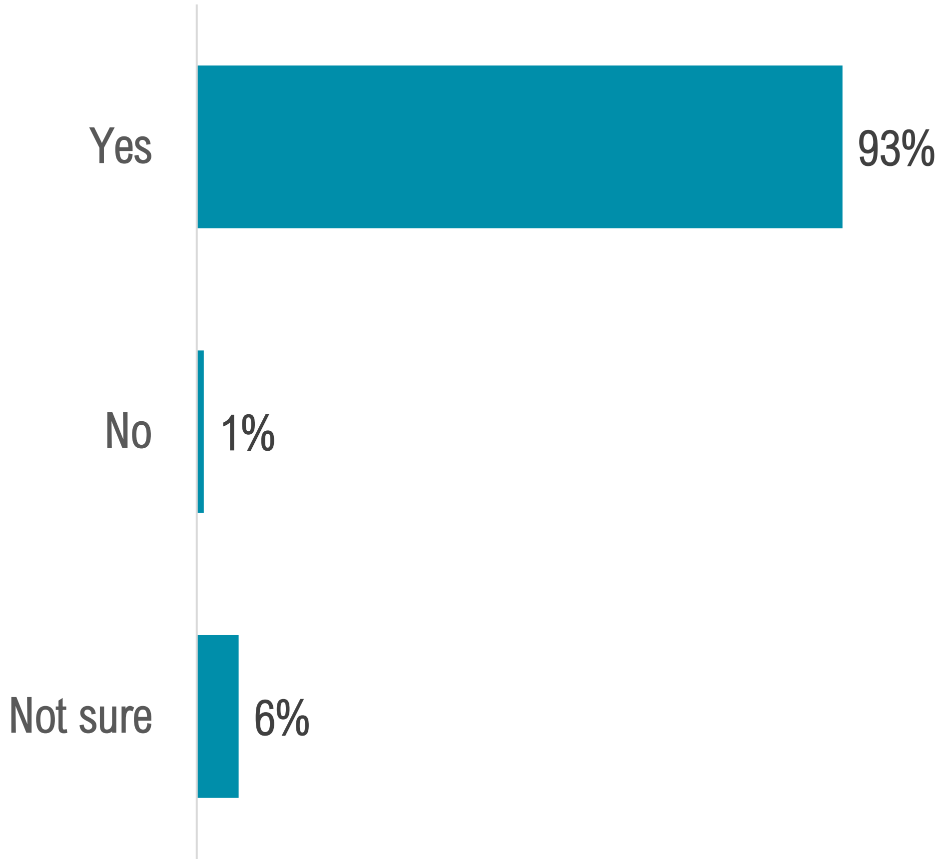
LIKELY TO RETURN



LIKELY TO RETURN NEXT YEAR



FEEL WELCOME

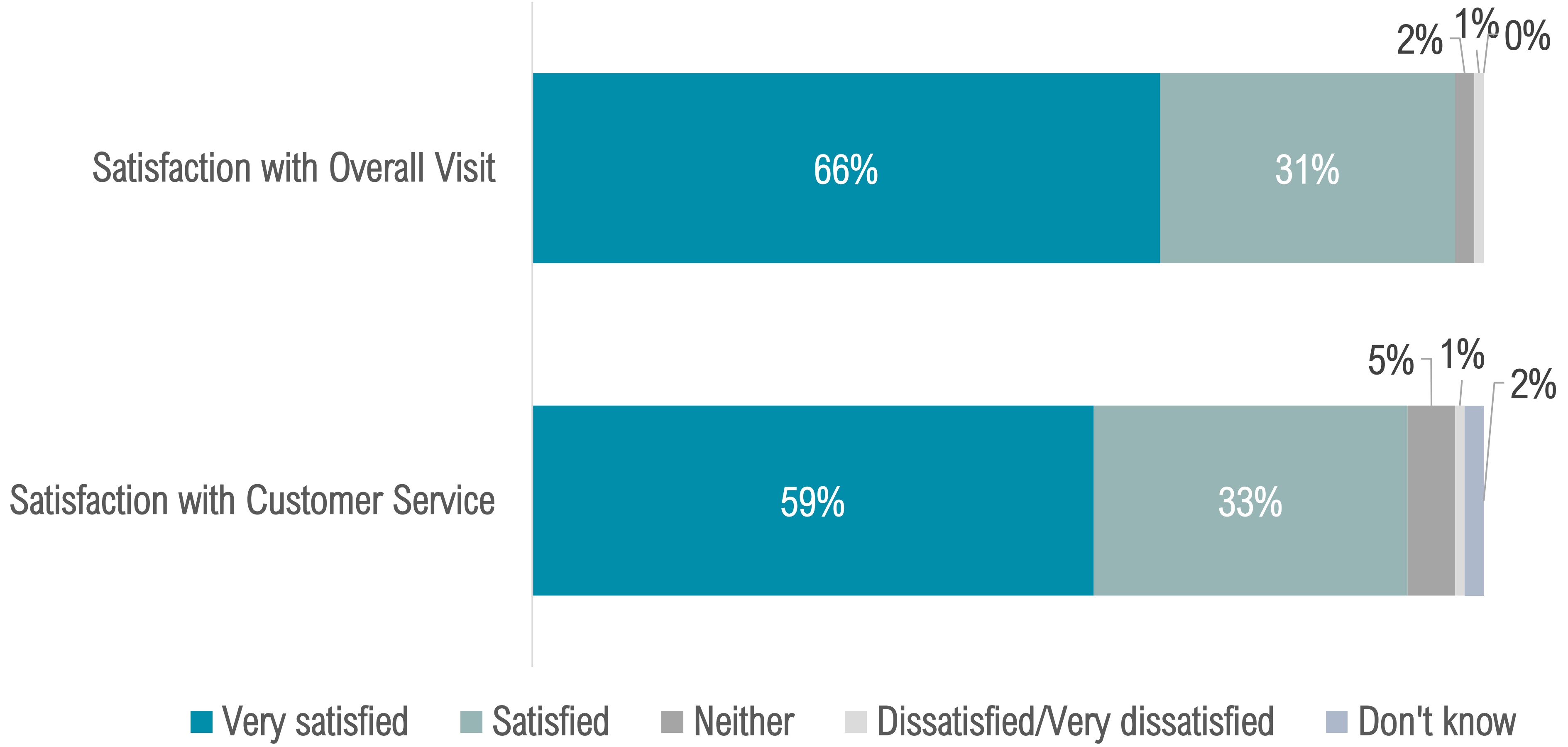


SATISFACTION RATINGS

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2020	2021	2020	2021	2020	2021	2020	2021
Likely to Recommend	88%	91%	94%	96%	93%	94%	87%	96%
Likely to Return	79%	80%	94%	94%	89%	89%	71%	92%
Likely to Return Next Year	39%	39%	74%	71%	60%	60%	59%	67%

SATISFACTION

- Compared to 2020, visitors were less likely to be very satisfied (-7.0% points) with customer service.



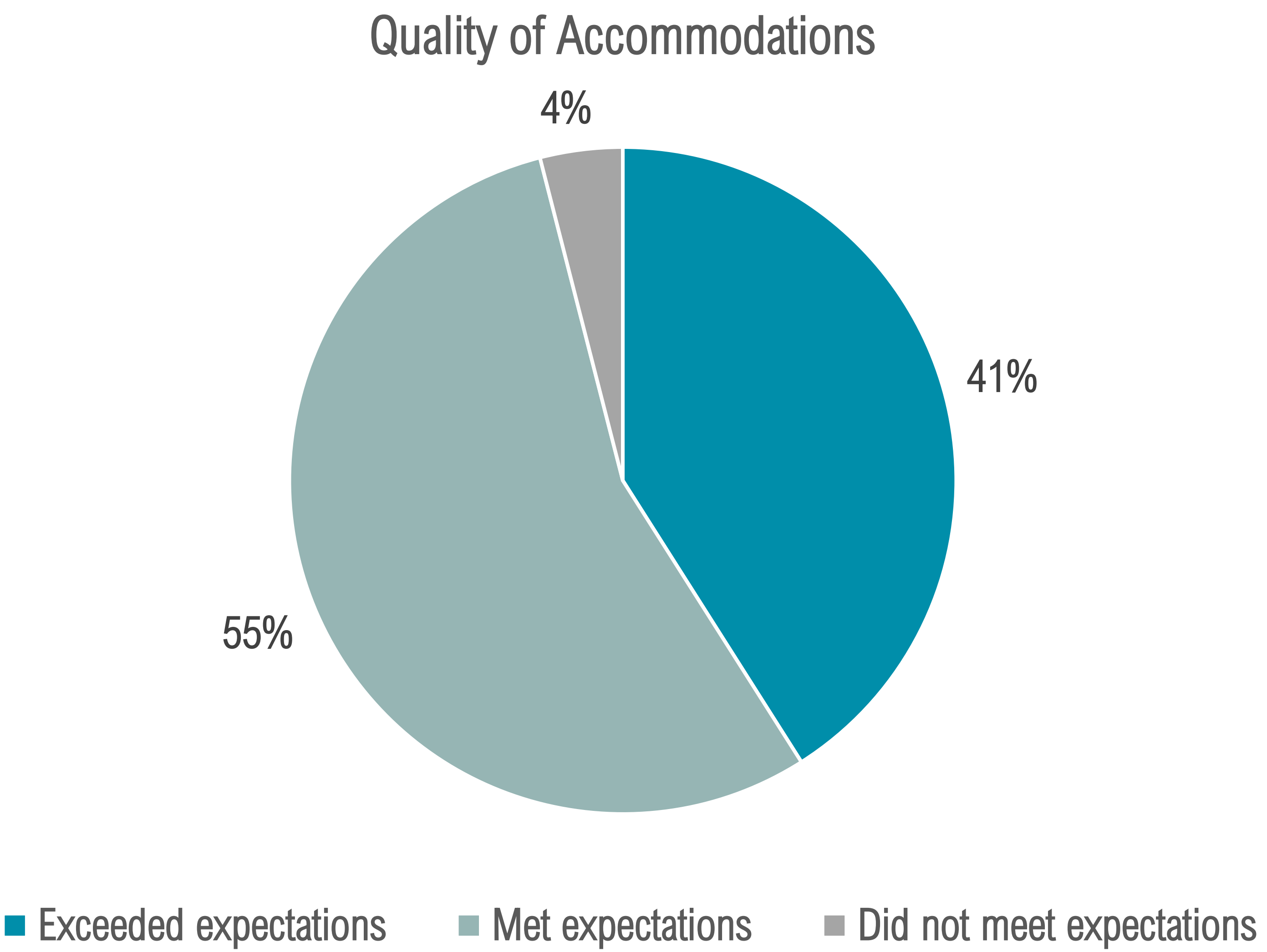
SATISFACTION RATINGS: OVERALL VISIT

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2020	2021	2020	2021	2020	2021	2020	2021
Very Satisfied	67%	56%	70%	71%	70%	66%	59%	59%
Satisfied	28%	39%	27%	27%	28%	31%	36%	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	67%	51%	65%	62%	66%	59%	56%	53%
Satisfied	25%	37%	29%	31%	29%	33%	34%	38%

SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

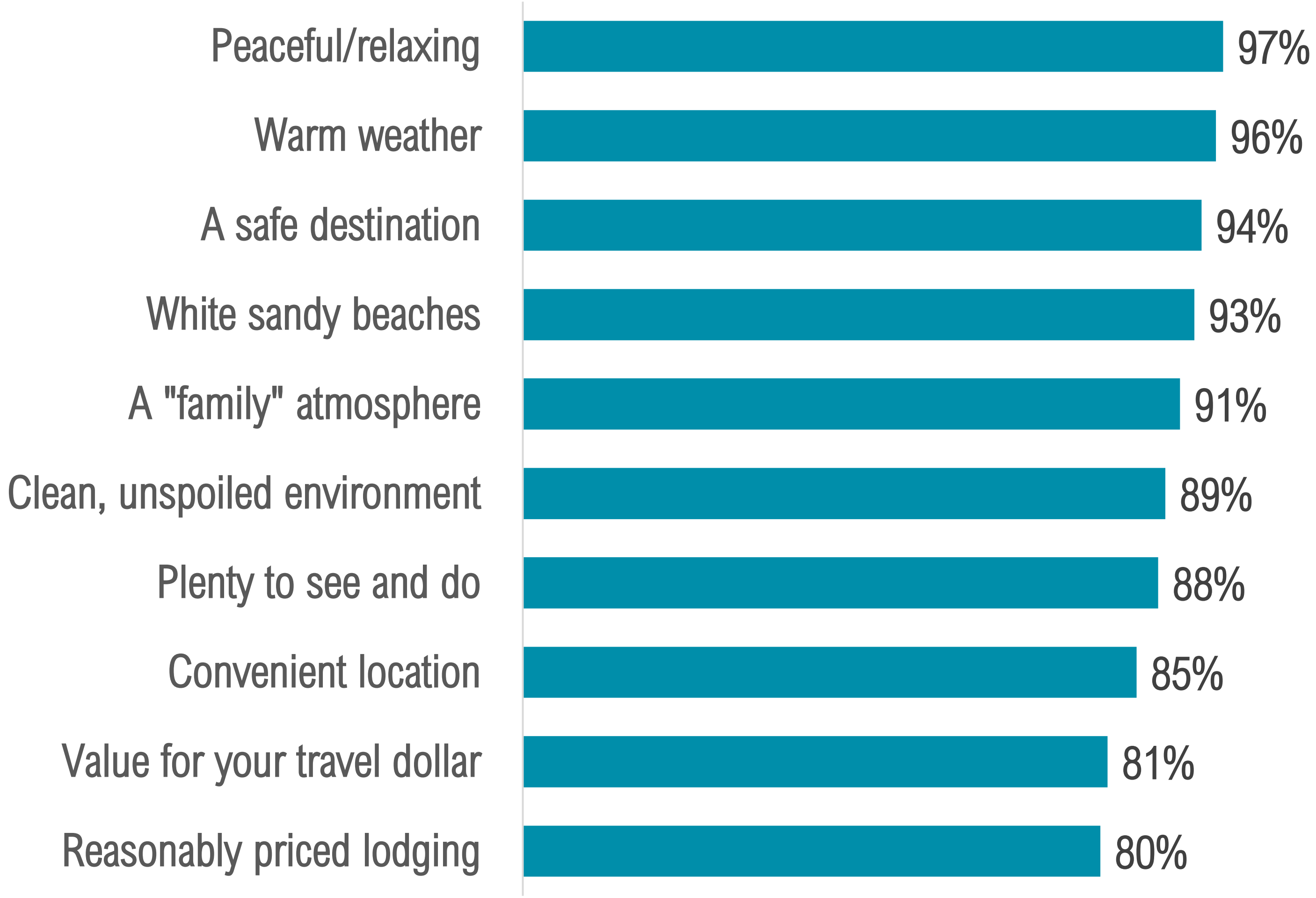


SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2020	2021	2020	2021	2020	2021	2020	2021
Exceeded Expectations	49%	41%	44%	41%	46%	41%	33%	47%
Met Expectations	47%	55%	54%	55%	52%	55%	62%	41%
Did Not Meet Expectations	4%	4%	2%	4%	2%	4%	5%	13%

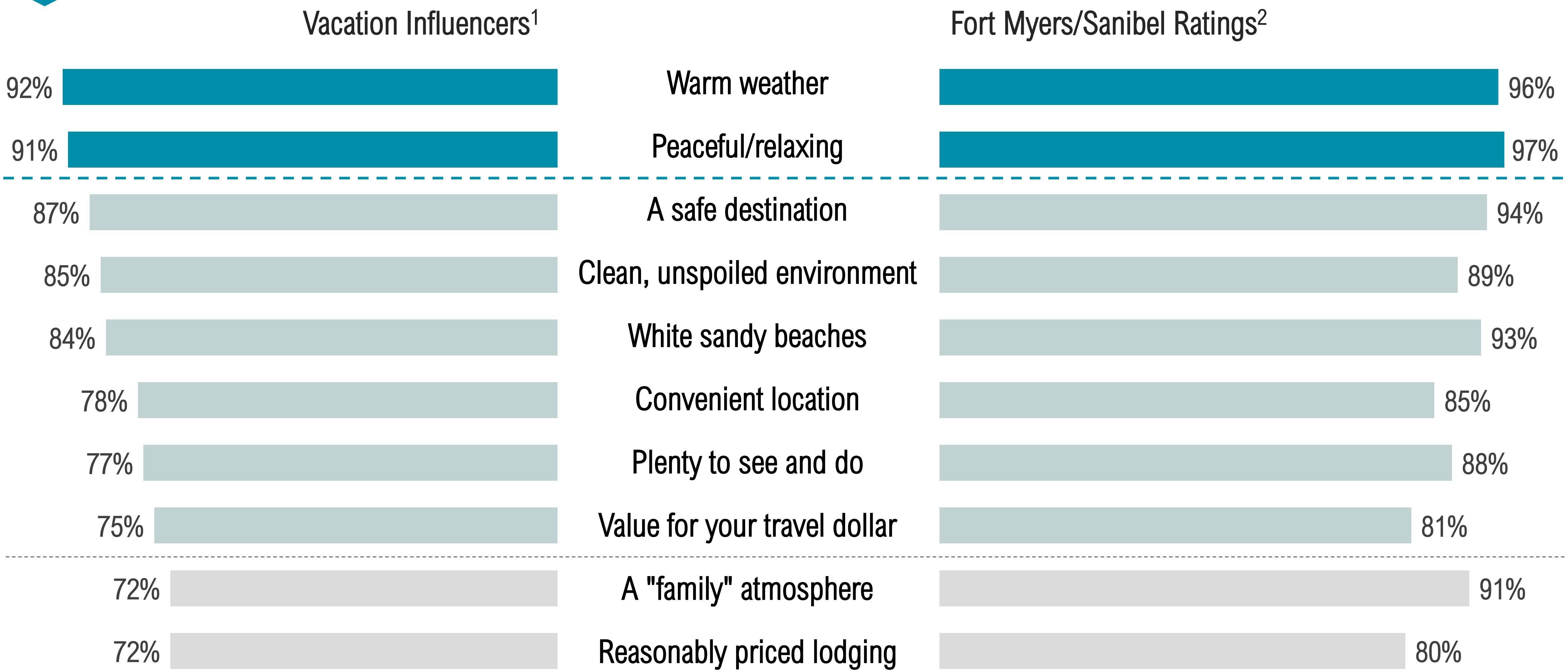
ATTRIBUTE RATINGS[1]

At least **90%** of visitors gave high experience ratings for **peace, warm weather, a safe destination, white sandy beaches,** and **a "family" atmosphere** 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

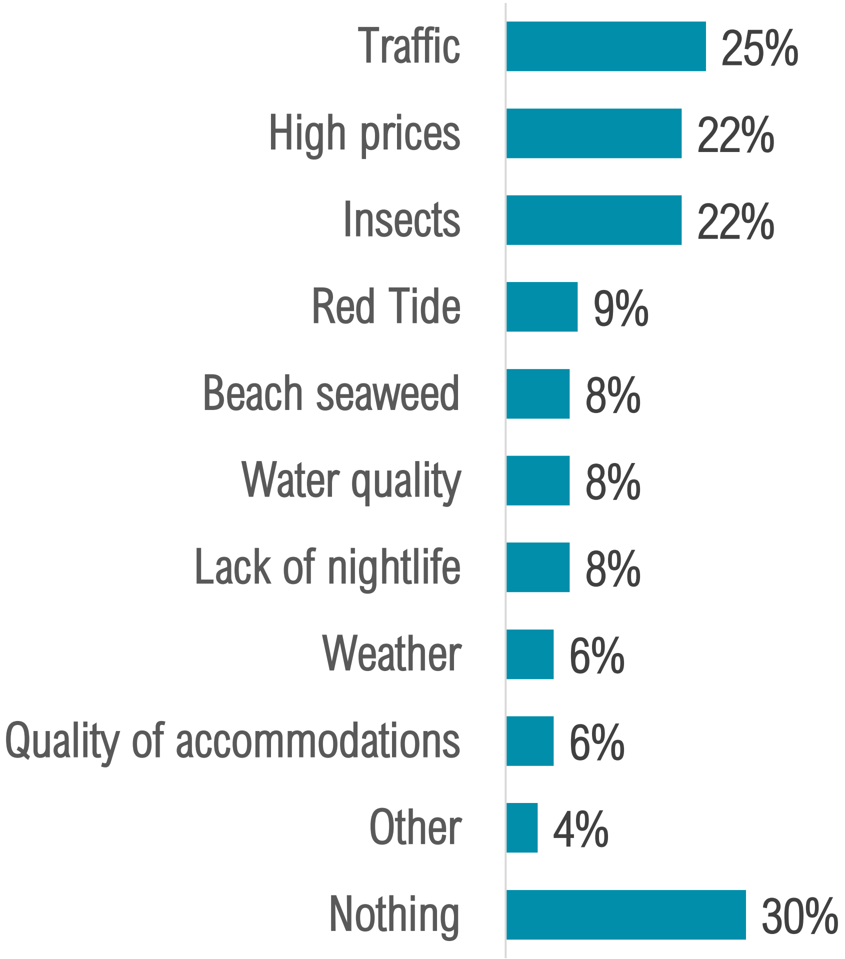


[1]Top 2 box scores. Attributes rated on a scale from 1 to 5 where 1 is Not at All Influential and 5 is Definitely Influential.
[2]Top 2 box scores. Attributes rated on a scale from 1 to 5 where 1 is Poor and 5 is Excellent.

Post-Trip Evaluation
Oct – Dec 2021

LEAST LIKED FEATURES[1]

About 1 in 4 visitors were concerned about **traffic, high prices** and **insects** during their visit.



[1]Multiple responses permitted.
During this specific visit, which features have you like the LEAST about our area?

AREA DESCRIPTIONS[1]

Visitors describe the Fort Myers area as having **beautiful beaches** and being **wonderful place to visit**.

It should be noted that in the previous years **70% of visitors** checked at least one negative attribute. However, when asked to describe their experience, only **12%** offered a negative description.

[1]Coded verbatim responses; multiple responses permitted.

AREA DESCRIPTIONS

Warm Weather

- "Water was warm, and the weather was fantastic in October!"
- "If you are looking for a warm getaway, with beautiful foliage, pristine beaches, white sand, water to the horizon, fun shell collecting, bike riding on safe trails, museums, and all your amenities within biking ... book a room at Sanibel Island."
- "Our favorite yearly vacation with beautiful weather, gorgeous beaches, stellar sunsets, great restaurants, boating and fishing, and family oriented."

Beautiful Beaches

- "Awesome vacation with beautiful beaches gorgeous sunsets safe and family environment. Awesome water sports such as kayaking and jet skiing. Great fishing also on charter flights."
- "Nice vacation with gorgeous beaches, sunsets, restaurants, and happy hours. Great boating and jet skis and kayaking."
- "Awesome vacation beautiful beaches family oriented."

AREA DESCRIPTIONS

Wonderful Place to Visit

- "An awesome vacation for us with great weather, beautiful beaches, water sports, jet skiing, kayaking, and great restaurants. We definitely will return again!"
- "A favorite vacation destination for us as we love the weather, subtropical atmosphere, perfect warm waters in the Gulf of Mexico, great sunsets, fishing and boating."
- "A wonderful vacation destination is tropical atmosphere, great weather, and plenty to see and do."

Relaxing & Peaceful

- "The most relaxing beaches ever! Everyone in Sanibel was very friendly. We stayed at Sanibel Moorings and EVERY staff member we came in contact with, was friendly, polite, and professional. Fabulous place!"
- "Quiet beach town with beautiful beaches and great shelling. I love the laid-back feel and was truly able to disconnect and relax."
- "Gorgeous. Perfect for relaxing. No traffic snarls, outstanding shell hunting. Terrific restaurants. Safe."

OCCUPANCY BAROMETER: JANUARY – MARCH RESERVATIONS

Jan – March Reservations	Jan – March 2021	Jan – March 2022
Up	3%	75%
Same	3%	18%
Down	92%	6%
Not Sure	2%	1%

OCCUPANCY BAROMETER: APRIL – JUNE RESERVATIONS

April – June Reservations	April – June 2021	April – June 2022
Up	13%	35%
Same	4%	49%
Down	81%	14%
Not Sure	2%	2%

Year-Over-Year Comparisons

ECONOMIC IMPACT

Visitor & Lodging Statistics	Oct – Dec 2019	Oct – Dec 2020	Oct – Dec 2021	% Change '19 – '21
Visitors	1,249,500	1,097,800	1,301,600	+4.2%
Room Nights	1,456,300	1,320,900	1,780,000	+22.2%
Direct Expenditures	$743,544,500	$644,054,500	$959,551,100	+29.1%
Total Economic Impact	$1,207,516,300	$1,045,944,500	$1,529,524,500	+26.7%
Occupancy	63.1%	57.2%	68.7%	+8.9%
ADR	$137.39	$138.82	$152.67	+11.1%
RevPAR	$86.69	$79.41	$104.88	+21.0%

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM

	Oct – Dec 2019	Oct – Dec 2020	Oct – Dec 2021	% Change ’19 – ‘21
Direct Jobs	9,992	8,609	12,897	+29.1%
Total Jobs	13,974	12,048	17,703	+26.7%
Direct Wages	$224,149,500	$196,562,600	$288,897,100	+28.9%
Total Wages	$374,473,700	$327,692,000	$474,435,800	+26.7%
Direct Local Taxes	$22,678,100	$19,579,300	$29,266,300	+29.1%
Total Local Taxes	$40,814,100	$34,934,500	$51,697,900	+26.7%
Direct State Taxes	$52,866,000	$45,405,800	$68,224,100	+29.1%
Total State Taxes	$79,092,300	$67,986,400	$100,183,800	+26.7%

VISITOR TYPE

Visitor Type	Oct – Dec 2020	Oct – Dec 2021
Visitors in Paid Accommodations	74%	75%
Visitors in Non-Paid Accommodations	22%	22%
Day Trippers	4%	3%

PRE-VISIT

Planned trip in advance	Oct – Dec 2020	Oct – Dec 2021
1 week or less	4%	4%
2-4 weeks	15%	10%
1-2 months	30%	28%
3-6 months	26%	32%
6 months or more	20%	22%
Not sure	5%	4%

Considered Other Destinations	Oct – Dec 2020	Oct – Dec 2021
Yes	18%	22%
No	82%	78%

PRE-VISIT

Trip Planning Websites/Apps[1]	Oct – Dec 2020	Oct – Dec 2021
Airline websites	34%	29%
Search engines	27%	28%
AirBnB, VRBO, Homeaway, or similar website	19%	22%
Trip Advisor	16%	17%
Hotel websites	22%	17%
Vacation rental websites	18%	16%
Booking websites	21%	16%
Travel reviews, blogs, stories, etc.	9%	11%
VCB Social Media	13%	8%
Visit Florida	10%	8%
Facebook	11%	7%
www.VisitFortMyers.com	10%	7%
YouTube, Hulu, Pandora	6%	4%
Instagram	6%	3%
None/Don't visit websites	15%	20%
Other	5%	7%

[1]Multiple responses permitted.

PRE-VISIT

Information Requests[1]	Oct – Dec 2020	Oct – Dec 2021
Call hotel/motel/condo	28%	23%
Visitor guide	15%	7%
VCB E-newsletter	12%	4%
Call local Chamber of Commerce	10%	3%
Call VCB	9%	3%
None/Did not request info	52%	67%
Other	3%	3%

[1]Multiple responses permitted.

PRE-VISIT

Recall of Lee County Promotions	Oct – Dec 2020	Oct – Dec 2021
Yes	38%	33%
No	48%	50%
Can't recall	14%	17%

Characteristics influencing decision to visit Lee County (top 2 boxes)	Oct – Dec 2020	Oct – Dec 2021
Warm weather	93%	92%
Peaceful/relaxing	94%	91%
A safe destination	90%	87%
Clean, unspoiled environment	88%	85%
White sandy beaches	89%	84%
Convenient location	85%	78%
Plenty to see and do	81%	77%
Value for your travel dollar	79%	75%
A "family" atmosphere	79%	72%
Reasonably priced lodging	77%	72%

PRE-VISIT

Transportation	Oct – Dec 2020	Oct – Dec 2021
Fly	65%	75%
Drive a personal vehicle	27%	20%
Drive a rental vehicle	4%	3%
Drive a RV	3%	1%
Travel by bus	0%	0%
Other	1%	1%

Airport Used	Oct – Dec 2020	Oct – Dec 2021
Southwest Florida International	77%	83%
Miami International	2%	2%
Ft. Lauderdale international	6%	4%
Orlando International	2%	1%
Tampa International	3%	3%
Punta Gorda	10%	6%
Other	0%	1%

TRAVEL PARTY PROFILE

Visitor Origin	Oct – Dec 2020	Oct – Dec 2021
Florida	10%	5%
Southeast	19%	19%
Northeast	15%	19%
Midwest	42%	41%
West	10%	8%
Canada	2%	4%
United Kingdom	<1%	<1%
Germany	1%	1.5%
Other Europe	<1%	<1%
Other international	<1%	<1%

Visitor Origin	Oct – Dec 2020	Oct – Dec 2021
New York City	5%	5%
Chicago	5%	4%
Minneapolis	2%	4%
Atlanta	2%	4%
Cleveland	2%	3%
Washington DC-Baltimore	3%	3%
Boston	<1%	3%
Detroit	3%	3%

TRAVEL PARTY PROFILE

Travel Parties	Oct – Dec 2020	Oct – Dec 2021
Mean travel party size	3.4[1]	3.0[1]
Travel with children under age 18	29%	30%

Travel Party Composition	Oct – Dec 2020	Oct – Dec 2021
Family	40%	38%
Couple	36%	37%
Group of couples/friends	9%	12%
Single	9%	10%
With business associates	5%	2%
In a tour group	1%	1%

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

TRAVEL PARTY PROFILE

Marital Status	Oct – Dec 2020	Oct – Dec 2021
Married	74%	72%
Single	23%	23%
Other	3%	5%

Age	Oct – Dec 2020	Oct – Dec 2021
Average age	52	52

Household Income	Oct – Dec 2020	Oct – Dec 2021
Median Income	$106,000	$110,200

TRIP EXPERIENCE

Length of Stay	Oct – Dec 2020	Oct – Dec 2021
Average nights in the Fort Myers area	6.6[1]	5.7[1]

First Time/Repeat Visitors	Oct – Dec 2020	Oct – Dec 2021
First-time	24%	29%
Repeat	76%	71%

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

TRIP EXPERIENCE

Activities[1]	Oct – Dec 2020	Oct – Dec 2021
Beaches	69%	71%
Relax & unwind	58%	67%
Dining	48%	57%
Shopping	33%	38%
Visiting friends/relatives	27%	31%
Nature, environment, bird watching	27%	30%
Water sports	22%	23%
Biking, hiking etc.	18%	22%
Fishing	19%	18%
Bars, nightlife	11%	14%
Attractions	13%	12%
Photography	12%	12%
Golf or tennis	13%	10%
Special occasion	8%	8%
Guided tours	7%	7%
Museums, history, etc.	8%	7%
Special event	9%	7%
Culture	6%	5%
Diving/snorkeling	6%	5%
Spas	5%	4%
Sporting event	5%	4%
Business, conference, meeting	4%	2%
Volunteering	4%	1%
Other	5%	4%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Attractions[1]	Oct – Dec 2020	Oct – Dec 2021
Beaches	69%	76%
Sanibel Lighthouse	30%	31%
Fort Myers Beach Pier	30%	30%
Sanibel Outlets	20%	19%
Periwinkle Place	15%	17%
J.N. Ding Darling National Wildlife Refuge	15%	17%
Edison & Ford Winter Estates	16%	14%
Miromar Outlets Mall	15%	12%
Coconut Point Mall	11%	10%
Bell Tower Shops	12%	10%
Shell Factory and Nature Park	11%	10%
Gulf Coast Town Center	9%	9%
Bailey-Matthews Shell Museum	7%	8%
Manatee Park	5%	4%
Broadway Palm Dinner Theater	4%	2%
Barbara B. Mann Performing Arts Hall	3%	1%
None	5%	8%
Other	3%	5%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Area stayed	Oct – Dec 2020	Oct – Dec 2021
Sanibel Island	23%	31%
Fort Myers Beach	23%	24%
Fort Myers	20%	14%
Cape Coral	11%	13%
Bonita Springs	6%	5%
Captiva Island	3%	4%
Estero	3%	3%
North Fort Myers	2%	1%
Along I-75	2%	1%
Lehigh Acres	1%	1%
Boca Grande/Outer Island	1%	0%
Pine Island	1%	0%
None/not staying overnight	4%	3%

POST-TRIP EVALUATION

Loyalty Metrics	Oct – Dec 2020	Oct – Dec 2021
Likely to recommend	93%	95%
Likely to return	90%	89%
Likely to return next year	64%	63%

Satisfaction with Accommodations	Oct – Dec 2020	Oct – Dec 2021
Exceeded expectations	45%	41%
Met expectations	52%	55%
Did not meet expectations	3%	4%

POST-TRIP EVALUATION

Satisfaction with Visit	Oct – Dec 2020	Oct – Dec 2021
Very satisfied	69%	66%
Satisfied	28%	31%
Neither	1%	2%
Dissatisfied/Very dissatisfied	1%	1%
Don’t know	1%	0%

Satisfaction with Customer Service	Oct – Dec 2020	Oct – Dec 2021
Very satisfied	66%	59%
Satisfied	28%	33%
Neither	3%	5%
Dissatisfied/Very dissatisfied	1%	1%
Don’t know	2%	2%

POST-TRIP EVALUATION

Visitor Concerns[1]	Oct – Dec 2020	Oct – Dec 2021
Traffic	25%	25%
Insects	25%	22%
High prices	22%	22%
Red Tide	13%	9%
Beach seaweed	15%	8%
Water quality	14%	8%
Lack of nightlife	12%	8%
Weather	15%	6%
Quality of accommodations	14%	6%
Nothing	22%	30%
Other	3%	4%

[1]Multiple responses permitted.

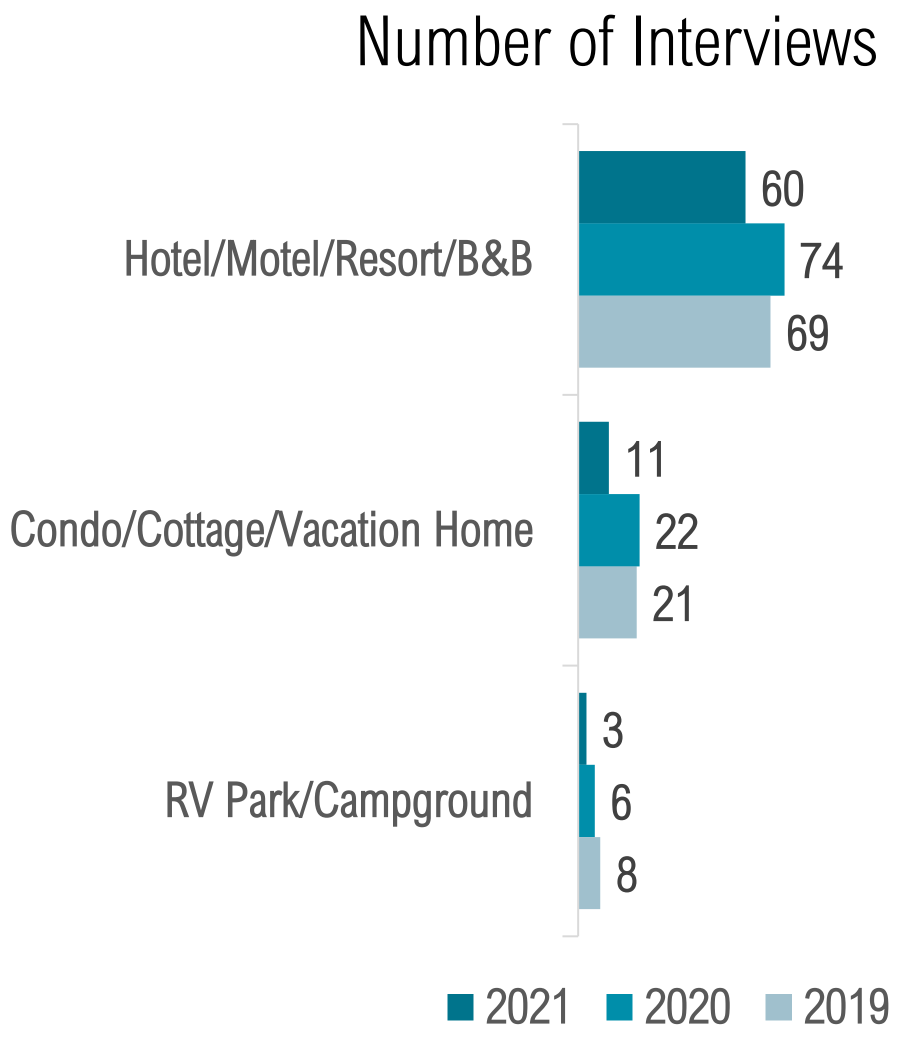
Methodology

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: 903 completed interviews
    - Target individuals: Oct – Dec visitors to Lee County
    - Data Collection: October 2021 – December 2021
  - Occupancy Study
    - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc., and the STR Report
    - Sample Size – data from 7,884 hotel/rental/campground units (74 properties) reporting to DSG, 10,406 hotel units reporting to STR (86 properties), and 19,248 rental unit listings on Key Data
  - IMPLAN Economic Impact Modeling software
    - IMPLAN models the way tourism dollars are spent and re-spent in other sectors of the economy, generating waves of economic activity, called multiplier effects. The model uses national industry data and county-level economic data to generate a series of multipliers, which in turn estimate the total economic implications of economic activity.
    - Over 1,500 organizations use IMPLAN, including FEMA, EPA, Federal Reserve Bank, and Bureau of Land Management.
  - Various government agencies and data sources
  - TDT collections provided by the Lee County VCB
  - Tourism database at Downs & St. Germain Research

METHODOLOGY

- Occupancy Study
  - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc.
    - Sample Size – 74 completed interviews
    - Data Collection: January 2022 (for Oct – Dec 2021)
  - Total Sample Size – data from 7,884 hotel/rental/campground units reporting to DSG, 10,406 hotel units reporting to STR (representing 86 properties), and 19,248 rental unit listings on Key Data



METHODOLOGY

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

225	Fort Myers Beach: The Pier, Times Square
345	Fort Myers: Centennial Park, RSW, Edison-Ford Winter Estates, Hampton Inn & Suites Fort Myers
183	Sanibel: Lighthouse Beach, Sanibel Moorings Resort
112	Cape Coral/North Fort Myers: Yacht Club Community Park
38	Bonita Springs: Bonita Beach, Estero

Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

Oct – Dec 2021

Visitor Tracking & Occupancy Study

Tamara Pigott, CDME
Executive Director

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

fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

downs & st. germain RESEARCH