Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

January – March 2022

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

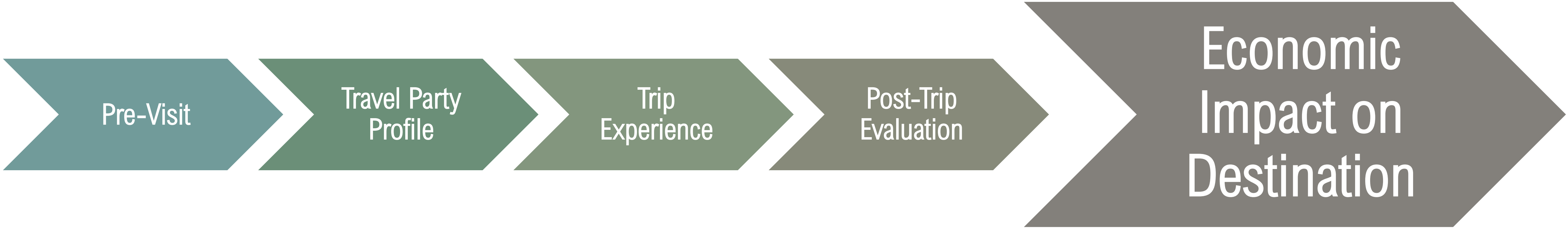
- Number of visitors
- Expenditures
- Economic impact
- Room nights generated
- Occupancy, ADR, RevPAR
- Jobs, wages and taxes supported by tourism

Executive Summary

TOURISM SNAPSHOT: NARRATIVE

- The increase in the number of visitors outpaced the increase in occupancy due to more rental units being available in 2022
- As the rest of the country and world re-opens, significantly more consumers considered multiple destinations before selecting the Fort Myers area
- More visitors noticed promotions this quarter compared to 2021
- There were more first time visitors this quarter compared to 2021
- Visitors were older, had higher household incomes and were less likely to travel with children this quarter compared to 2021

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION



TOURISM SNAPSHOT: KEY METRICS

Visitor & Lodging Statistics	Jan – Mar 2021	Jan – Mar 2022	% Change '21-'22
Visitors	913,800	1,126,500	+23.3%
Room Nights	1,554,500	1,985,900	+27.8%
Direct Expenditures[1]	$1,006,613,000	$1,410,763,600	+40.1%
Total Economic Impact[2]	$1,604,541,100	$2,247,346,400[3]	+40.1%

[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 2022, the IMPLAN multipler used to estimate economic impact is 1.593.

TOURISM SNAPSHOT: KEY METRICS 2020 VS. 2022

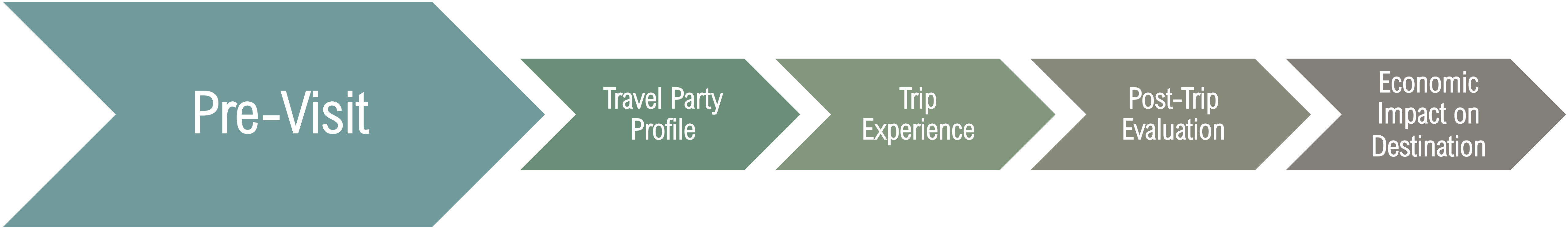
Visitor & Lodging Statistics	Jan – Mar 2020	Jan – Mar 2022	% Change '20-'22
Visitors	1,091,300	1,126,500	+2.7%
Room Nights	1,599,300	1,985,900	+20.9%
Direct Expenditures[1]	$1,082,785,200	$1,410,763,600	+26.2%
Total Economic Impact[2]	$1,758,443,200	$2,247,346,400	+27.8%[3]

[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 2022, the IMPLAN multipler used to estimate economic impact is 1.593.

JANUARY – MARCH LODGING STATISTICS

90.0%	$235.29	$211.84
Occupancy	ADR	RevPAR
↑14.3%	↑29.8%	↑48.3%

VISITOR JOURNEY: PRE-VISIT



TRIP PLANNING

- Nearly half of visitors planned their trips to the Fort Myers area at least 3 months in advance
- Over 2 in 5 visitors requested information from hotels, the VCB, etc., to plan their trips
  - 39% called a hotel/motel/condo when planning their trips
- 38% of visitors considered choosing other destinations when planning their trips

TRIP PLANNING: WEBSITES/APPS 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]:

34% Search engines

24% Airbnb, VRBO, HomeAway

23% Airline websites/apps

[1]Multiple responses permitted.

TOP TRIP INFLUENCERS

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

94% Warm weather

91% Peaceful/relaxing

[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]:

58% Vacation

51% Beach

39% Relax & unwind

19% Visit friends & relatives

[1]Three responses permitted.

PROMOTIONS

- 48% of visitors recalled promotions in the past 6 months for the Fort Myers area
- Top sources of recall include[1]:

44% Internet

32% Social media

24% Traveler review/blogs

[1]Multiple responses permitted.

BOOKING

- Visitors used the following to book their trips:

39% Directly with hotel/condo

18% VRBO, HomeAway

17% Online travel agencies

TRANSPORTATION

- 73% of visitors flew to the Fort Myers area
- 60% of all visitors traveled to Ft. Myers via RSW

VISITOR JOURNEY: TRAVEL PARTY PROFILE

Pre-Visit

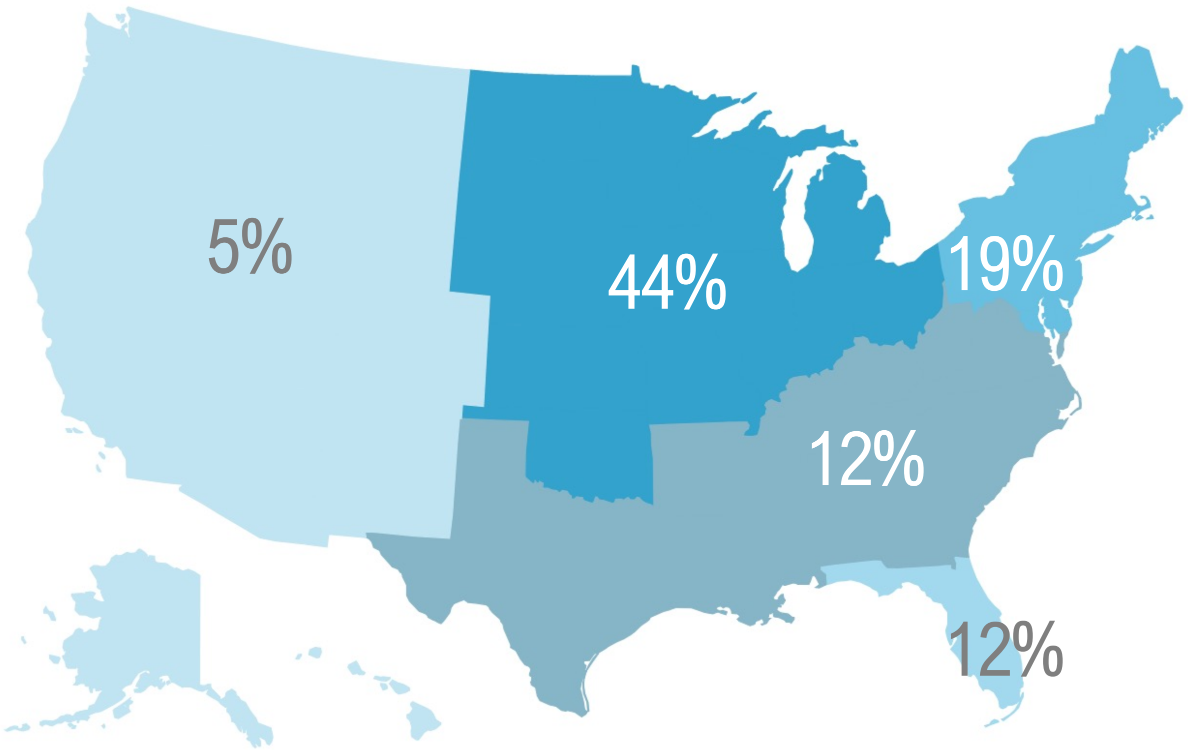
Travel Party Profile

Trip Experience

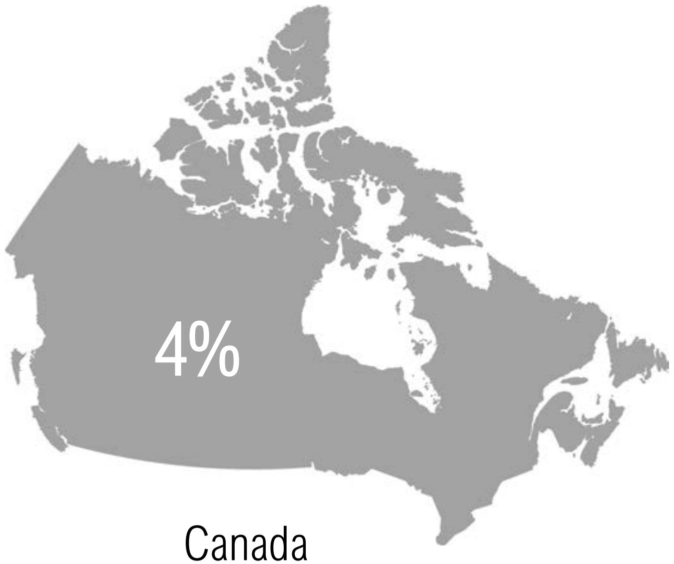
Post-Trip Evaluation

Economic Impact on Destination

ORIGIN[1]



US = 92%



Canada

[1]Based on the Visitor Tracking Study and data from Arrivalist.

TOP ORIGIN MARKETS[1]

7% Minneapolis-St. Paul

5% New York City

5% Chicago

5% Detroit

[1]Based on the Visitor Tracking Study and data from Arrivalist.

TRAVEL PARTY SIZE AND COMPOSITION

- Visitors traveled in a party composed of 3.5 people[1]
- 27% traveled with children under the age of 18
- 42% traveled as a family, while 36% of visitors traveled as a couple

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

DEMOGRAPHIC PROFILE

Jan – Mar Visitors:

- Average age of 52 years old
- Median household income of $112,500
- Married (71%)
- College educated (73%)
- Caucasian/white (83%)
- Slightly more likely to be male (55%)

Visitor Journey: Trip Experience

Pre-Visit

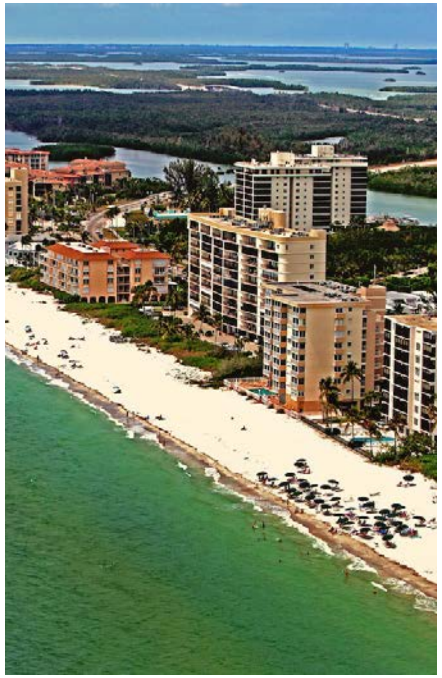
Travel Party Profile

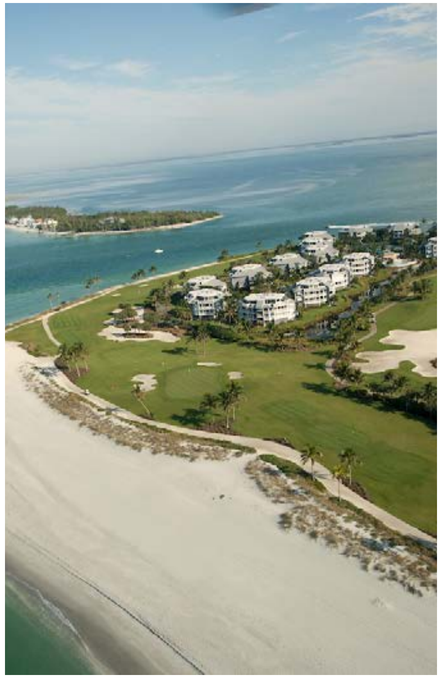
Trip Experience

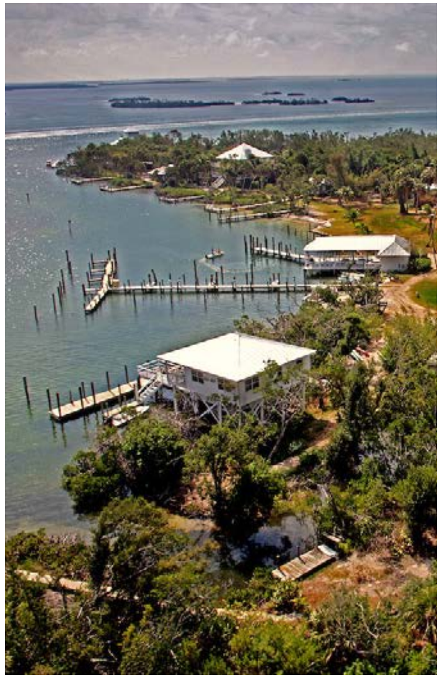
Post-Trip Evaluation

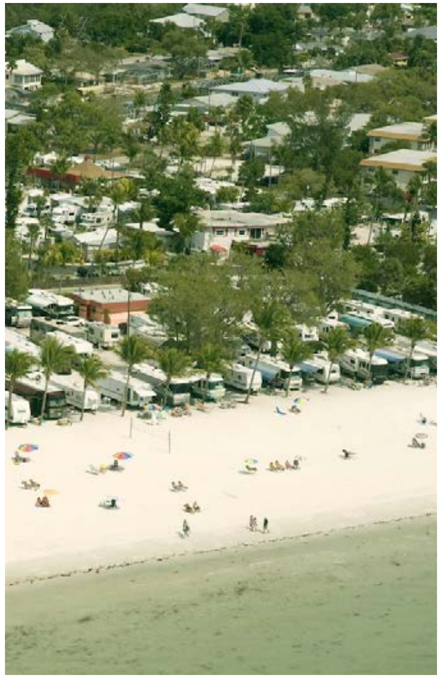
Economic Impact on Destination

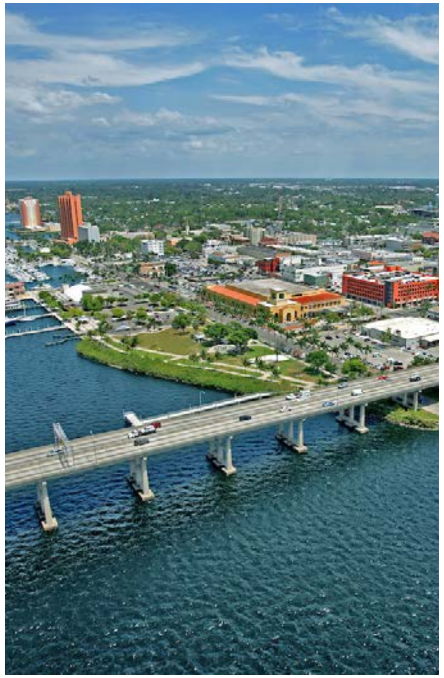
ACCOMMODATIONS


40% Condo/Vacation Rental


32% Hotel/Motel/Resort/B&B


25% Non-paid Accommodations


1% RV Park/Campground


2% Day trippers

LENGTH OF STAY & NUMBER OF TIMES IN DESTINATION

- Visitors[1] spent 8.8 nights in the Fort Myers area
- 35% were first time visitors
- 18% have visited more than 10 times

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

VISITOR ACTIVITIES

- Top visitor activities include[1]:

72% Beaches

67% Relax & unwind

54% Dining

[1]Multiple responses permitted.

TOP ATTRACTIONS VISITED[1]

72% Beaches

41% Fort Myers Beach Pier

29% Sanibel Lighthouse

21% Edison & Ford Winter Estates

[1]Multiple responses permitted.

TOP COMMUNITIES STAYED

29% Fort Myers Beach

22% Sanibel Island

16% Cape Coral

13% Fort Myers

VISITOR JOURNEY: POST-TRIP EVALUATION

SATISFACTION

- **95%** of visitors are **likely to recommend** the Fort Myers area
- **91%** of visitors are **likely to return**
- **58%** of visitors are **likely to return next year**

SATISFACTION

- 96% of visitors were satisfied or very satisfied with their overall visit to the Fort Myers area (58% were very satisfied)
- 92% of visitors were satisfied or very satisfied with customer service on their visit (55% were very satisfied)
- 34% of visitors said paid accommodations exceeded their expectations (95% met or exceeded expectations)

TOP ATTRIBUTE RATINGS

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

96% Warm weather

95% Peaceful/relaxing

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

→Nearly half of visitors were concerned about traffic in the Fort Myers area

→Nearly 1 in 5 were concerned about high prices and Red Tide

→21% of visitors had no concerns about the destination

AREA DESCRIPTIONS

Wonderful Place to Visit

"A beautiful destination for the whole family. A place to relax and enjoy the sounds of the clear blue water and gorgeous white sand."

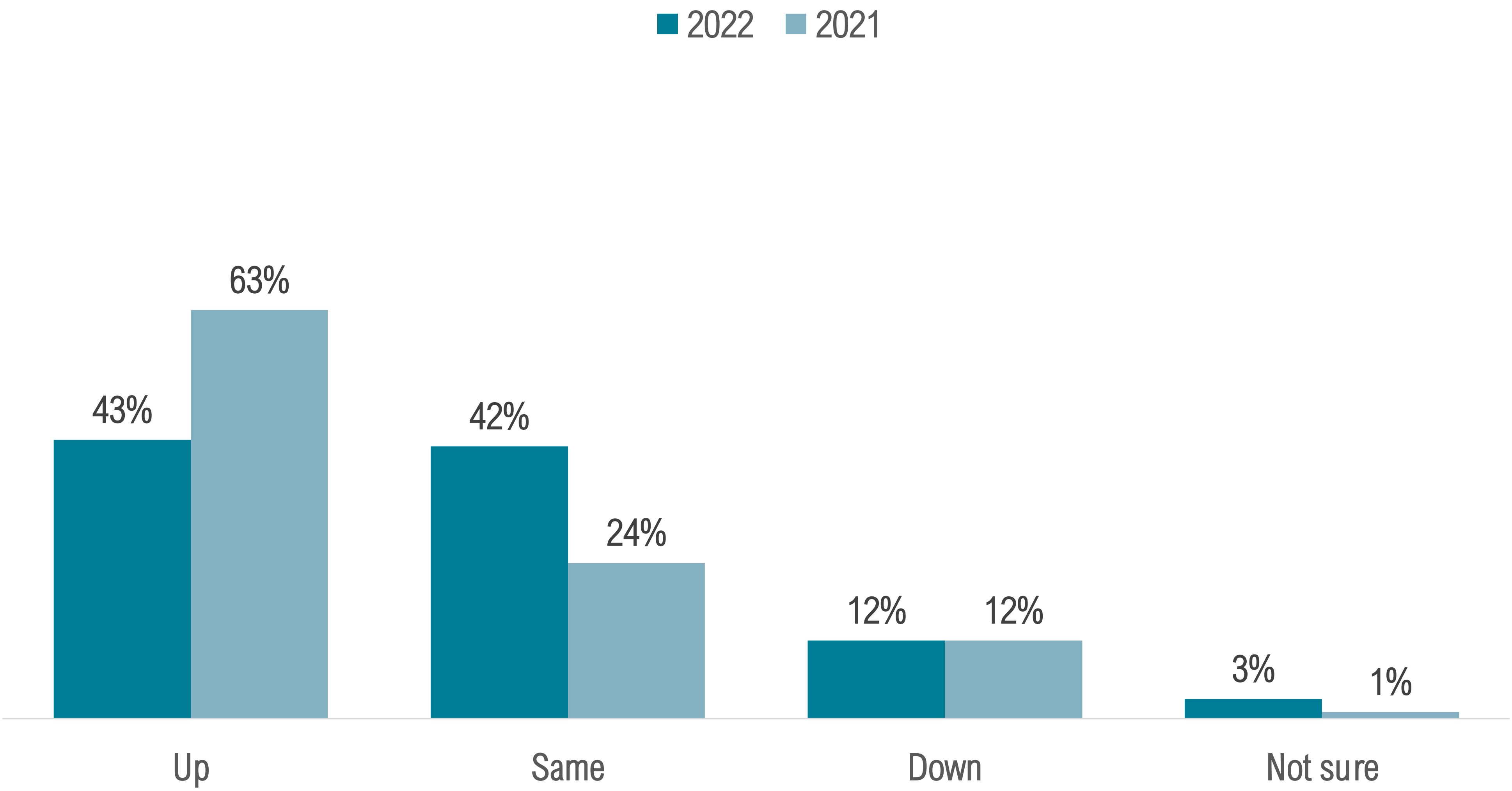
Beautiful Beaches

"The beaches are perfect. Soft and clean. We enjoyed trying the different beaches and finding shells."

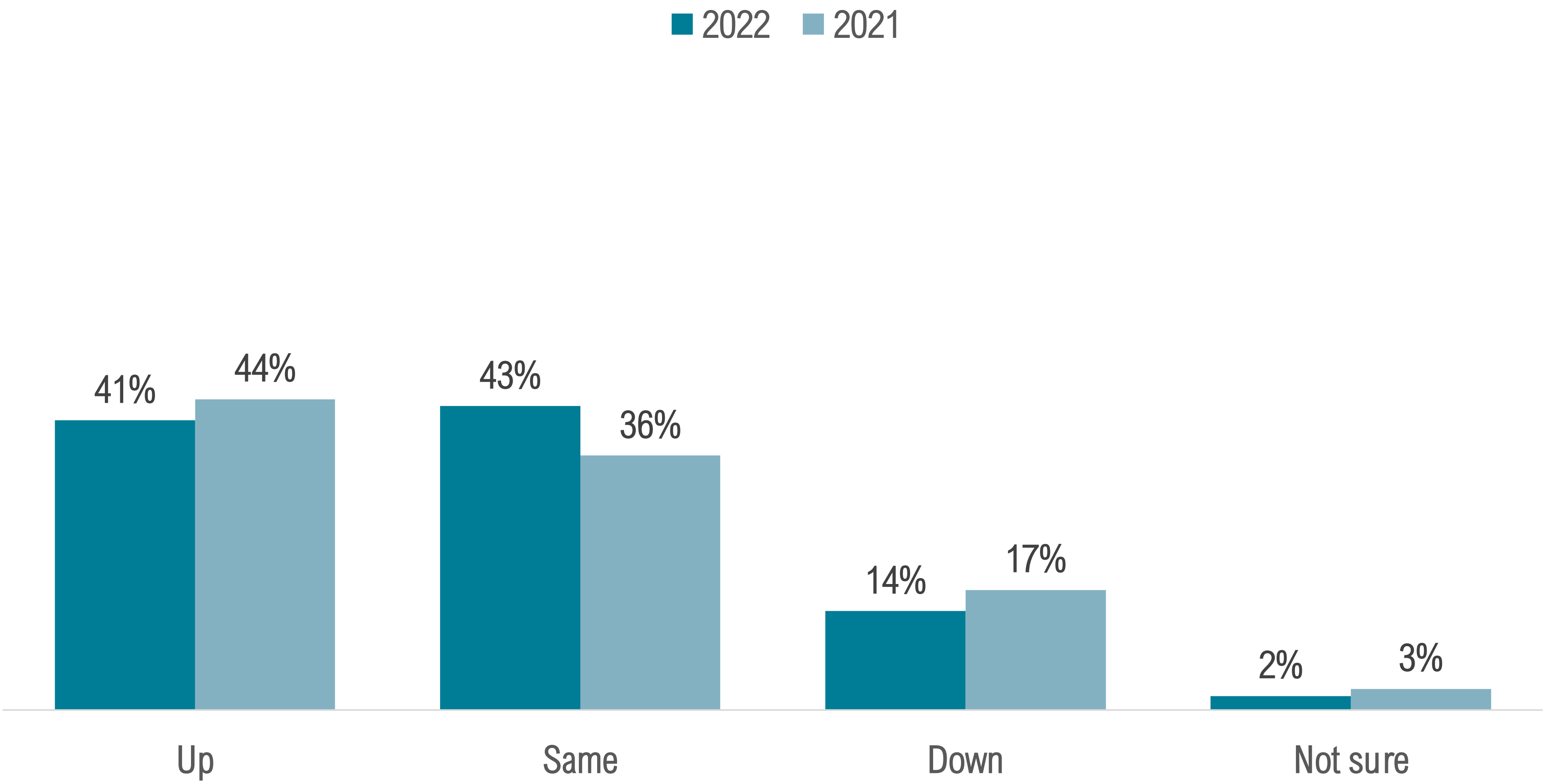
Relaxing & Peaceful

"I would describe it as a good place to go for a relaxing trip if you're looking for a calm place to get out and go on a trip to reset from a chaotic lifestyle."

OCCUPANCY BAROMETER: APRIL – JUNE RESERVATIONS



OCCUPANCY BAROMETER: JULY – SEPTEMBER RESERVATIONS



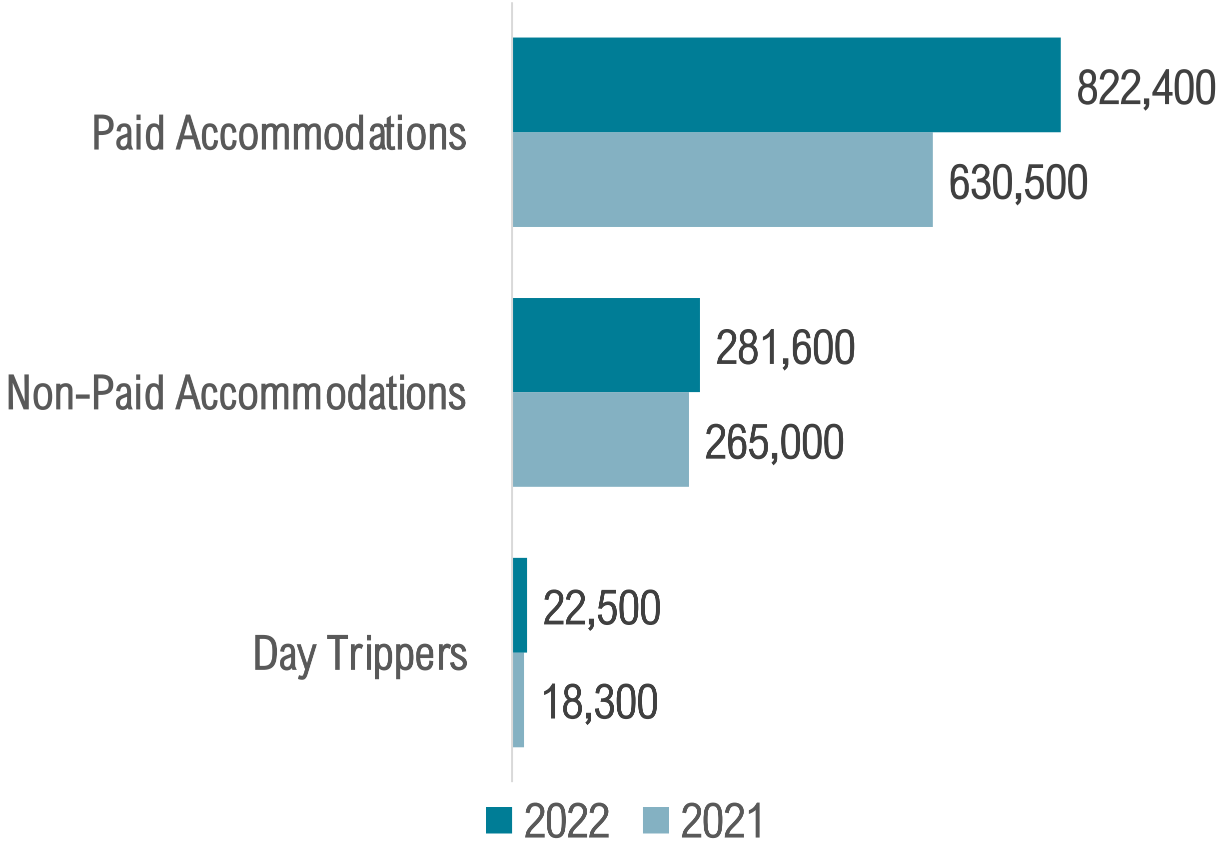
Detailed Findings

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

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

NUMBER OF VISITORS

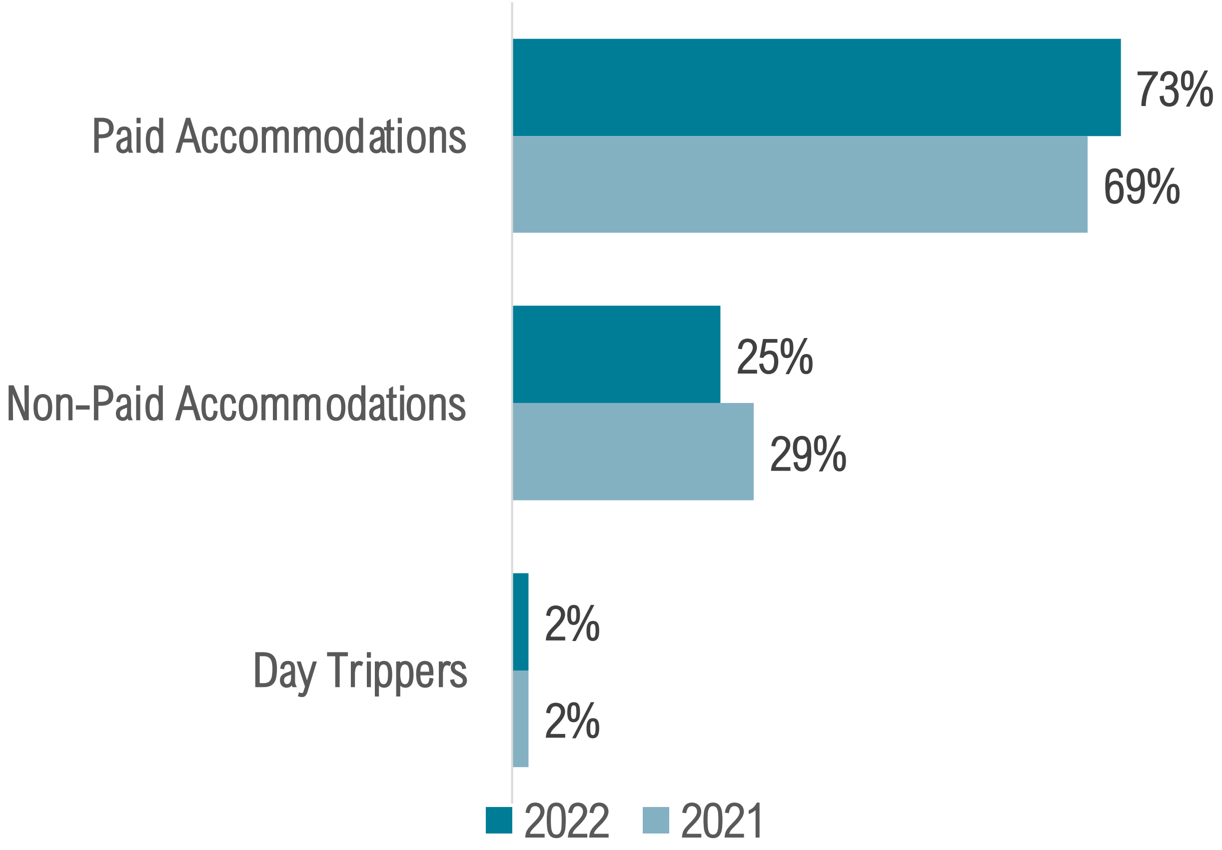
There were 1,126,500[1] visitors to the Fort Myers area in Jan – Mar 2022 (+23.3% from 2021).



[1]Sources: Visitor Tracking Study & Occupancy Survey

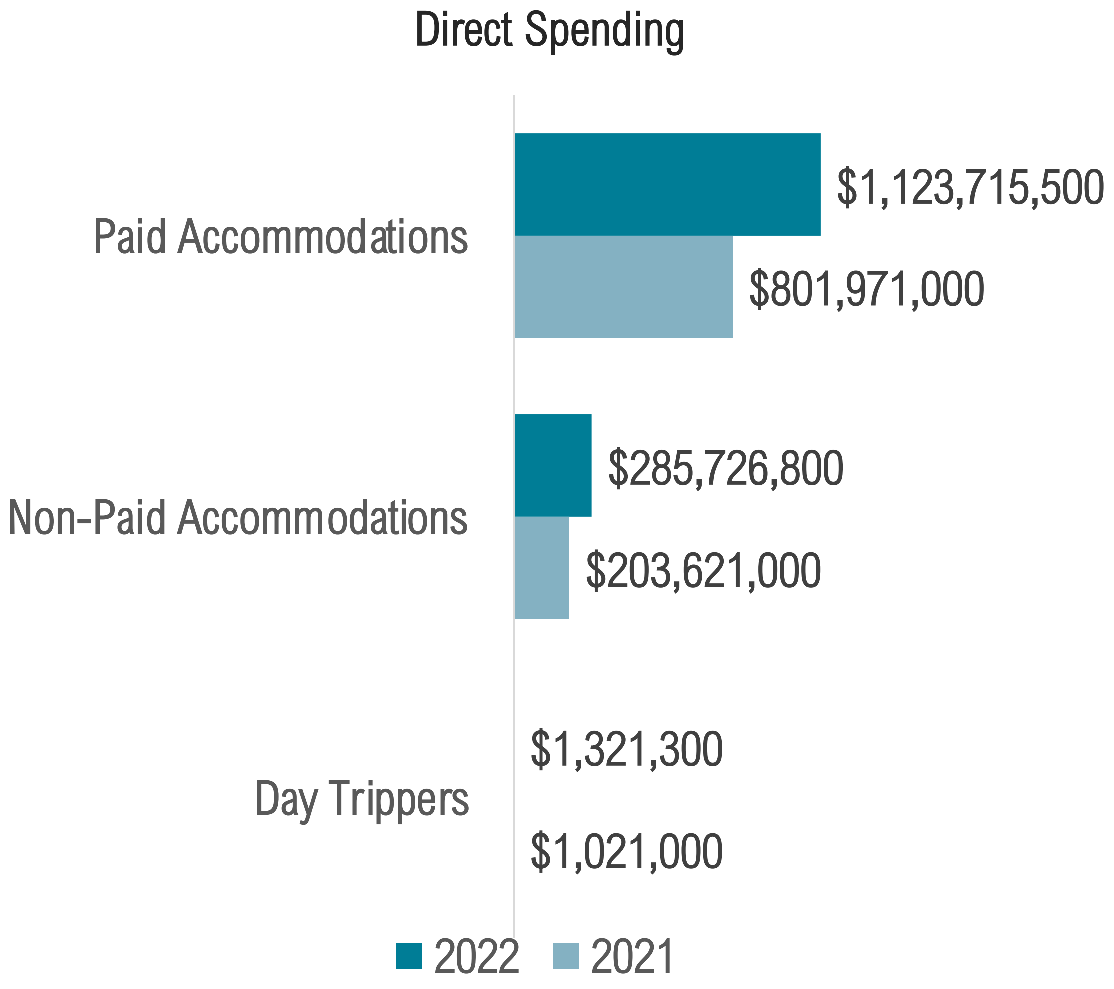
VISITOR TYPE

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



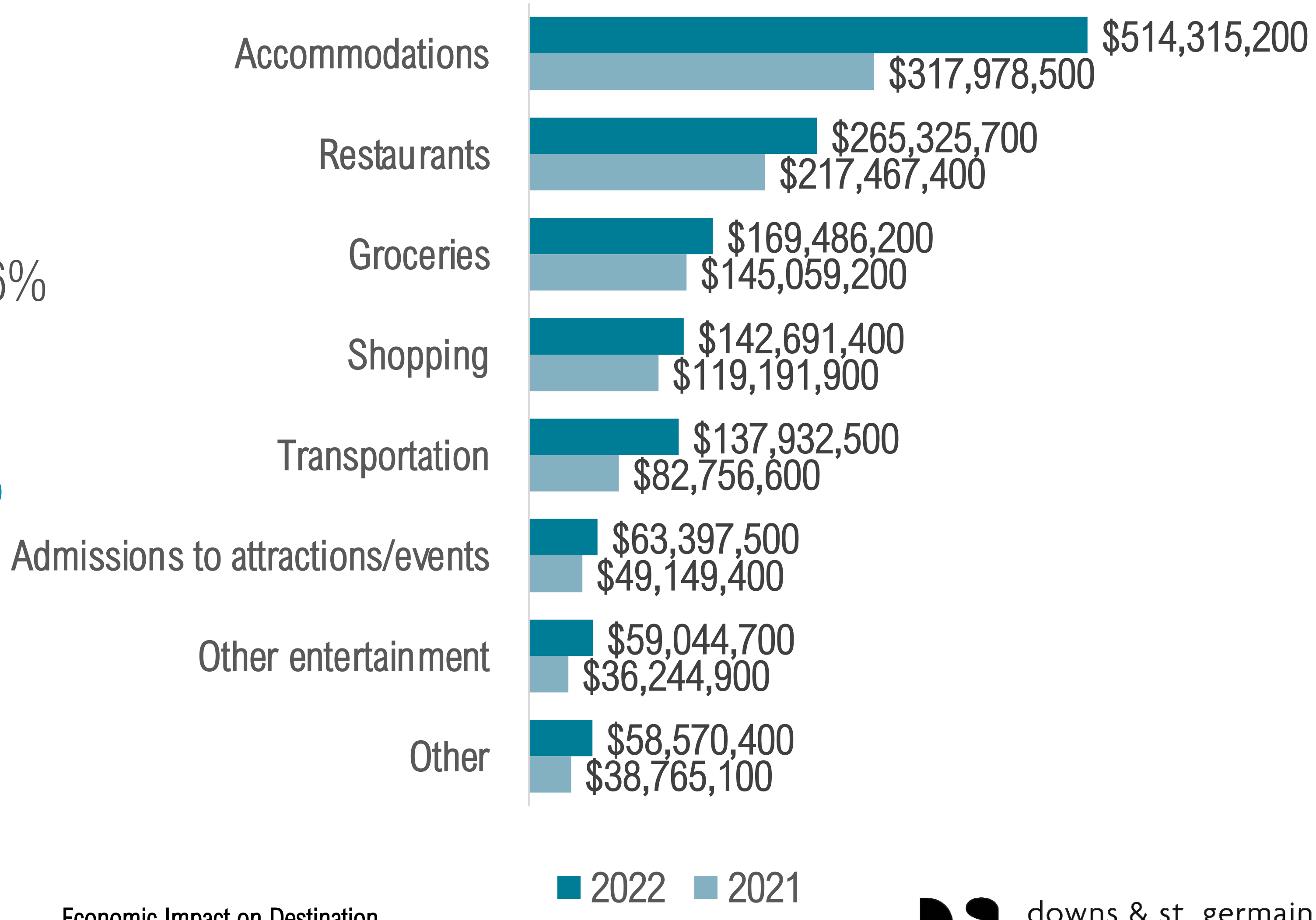
VISITOR EXPENDITURES BY VISITOR TYPE

Jan – Mar visitors spent $1,410,763,600 in the Fort Myers area, resulting in a total economic impact of $2,247,346,400, up 40.1% from 2021.



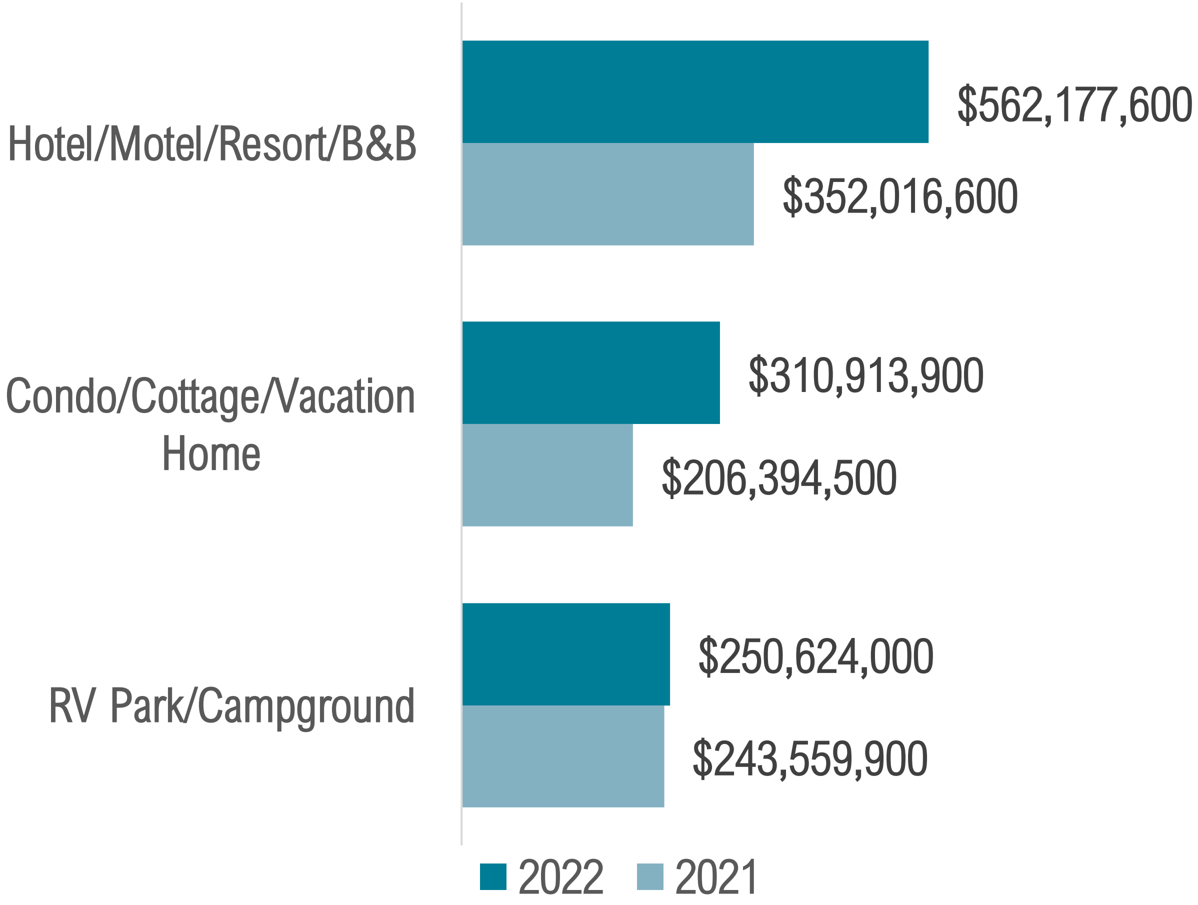
VISITOR EXPENDITURES BY SPENDING CATEGORY

Of the $1,410,763,600 visitors spent in the Fort Myers area, 36% was spent on accommodations and 19% was spent on restaurants, accounting for 55% of all visitor spending.



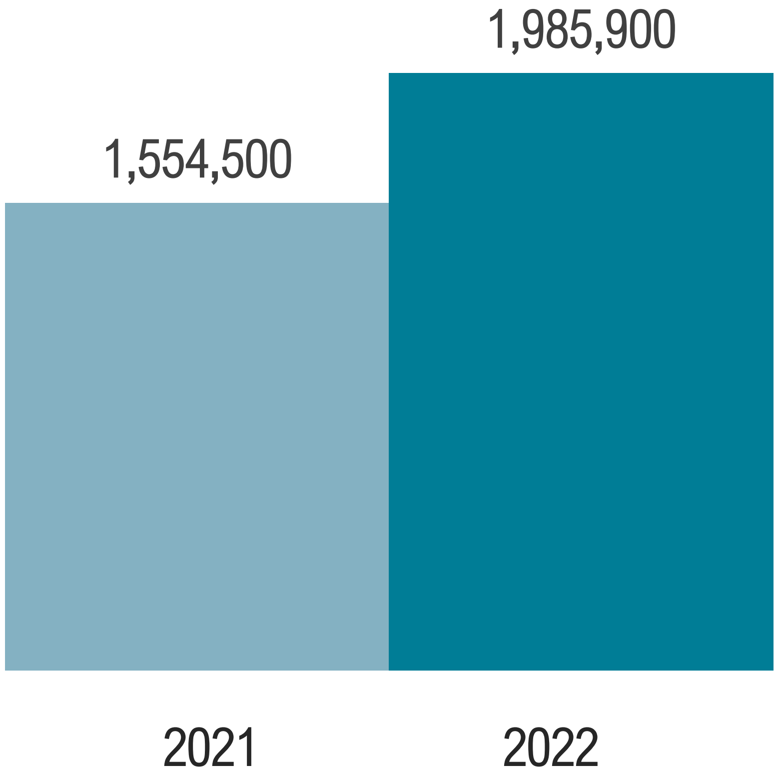
VISITOR EXPENDITURES BY LODGING TYPE

Jan – Mar visitors staying in paid accommodations spent **$1,123,715,500** in the Fort Myers area.



ROOM NIGHTS GENERATED

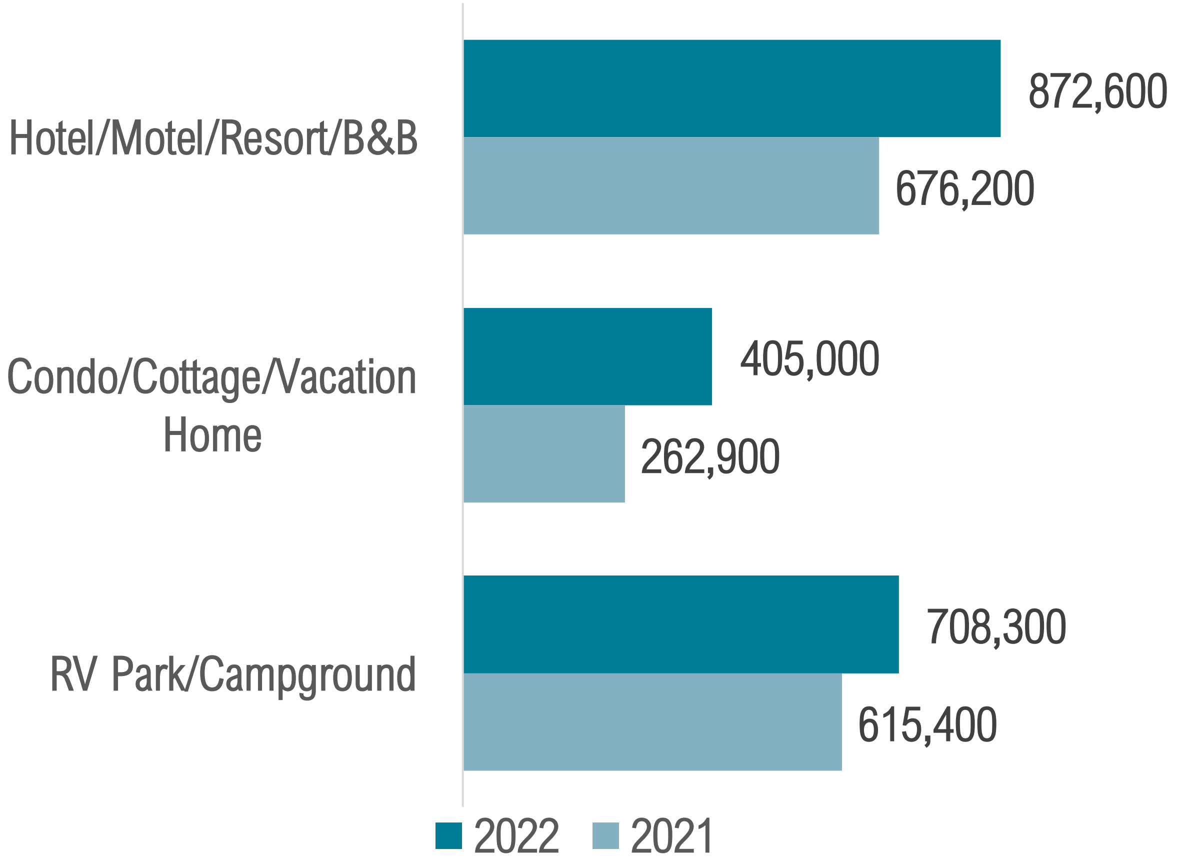
Jan – Mar visitors spent 1,985,900 nights in the Fort Myers area hotels, resorts, condos, rental houses, etc. (+27.8% from 2021).



[1]Source: Occupancy Survey

ROOM NIGHTS GENERATED

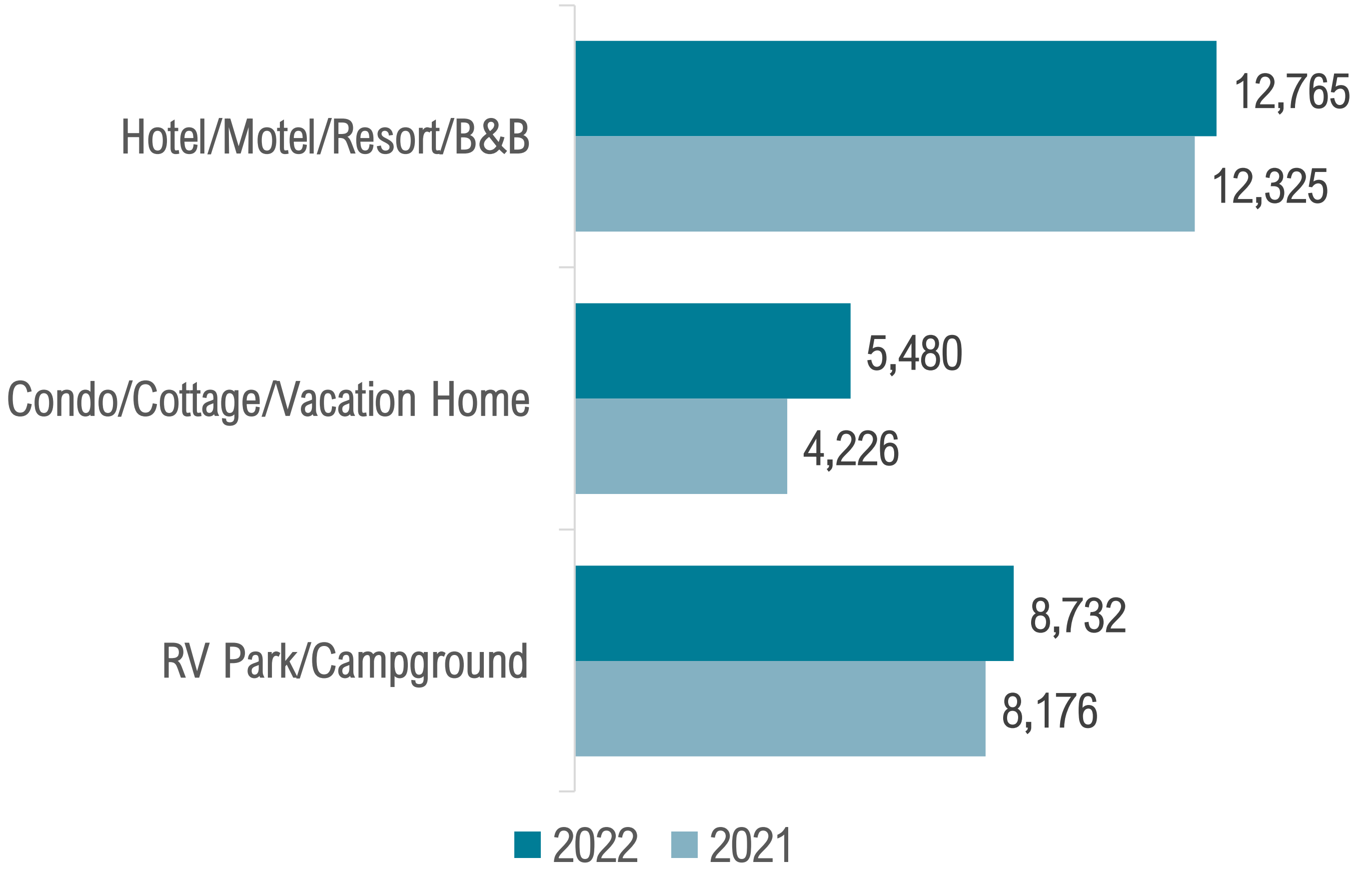
Motels, hotels, etc. accounted for over 2 in 5 nights in the Fort Myers area, while vacation rentals accounted for 1 in 5 nights visitors spent in the area.



[1]Source: Occupancy Survey

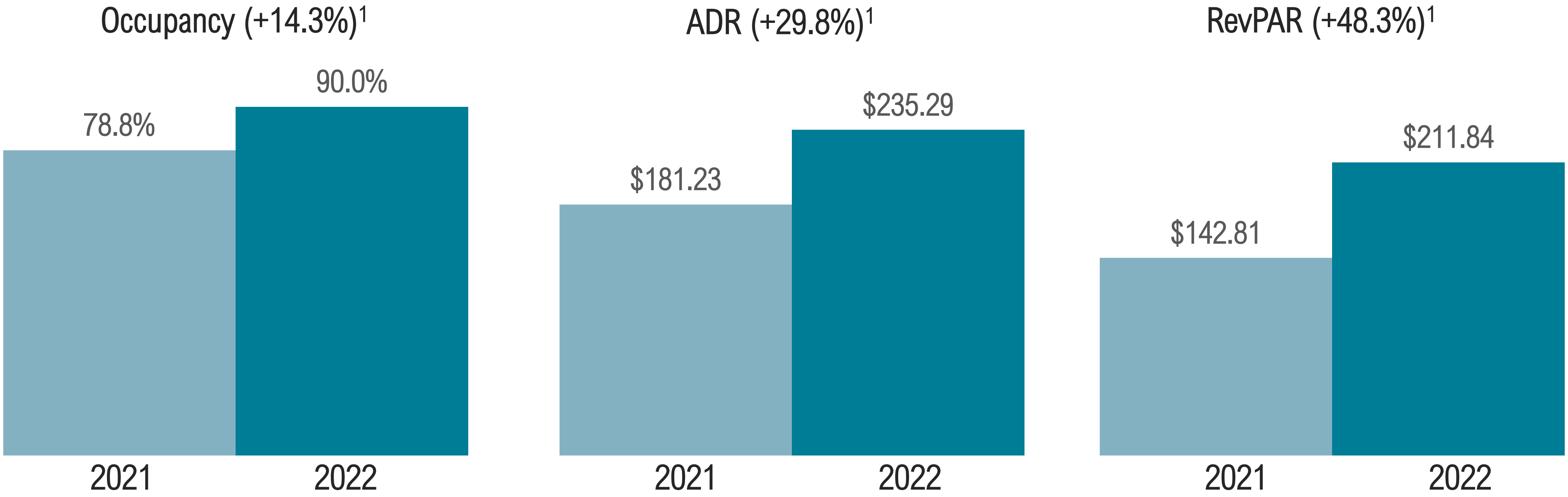
AVAILABLE UNITS

There were 26,977[1] available units in Jan – Mar, 2022 vs. 24,727 in 2021 (+9.1%). Over half of the units were hotels, motels, etc.



[1]Source: Occupancy Survey

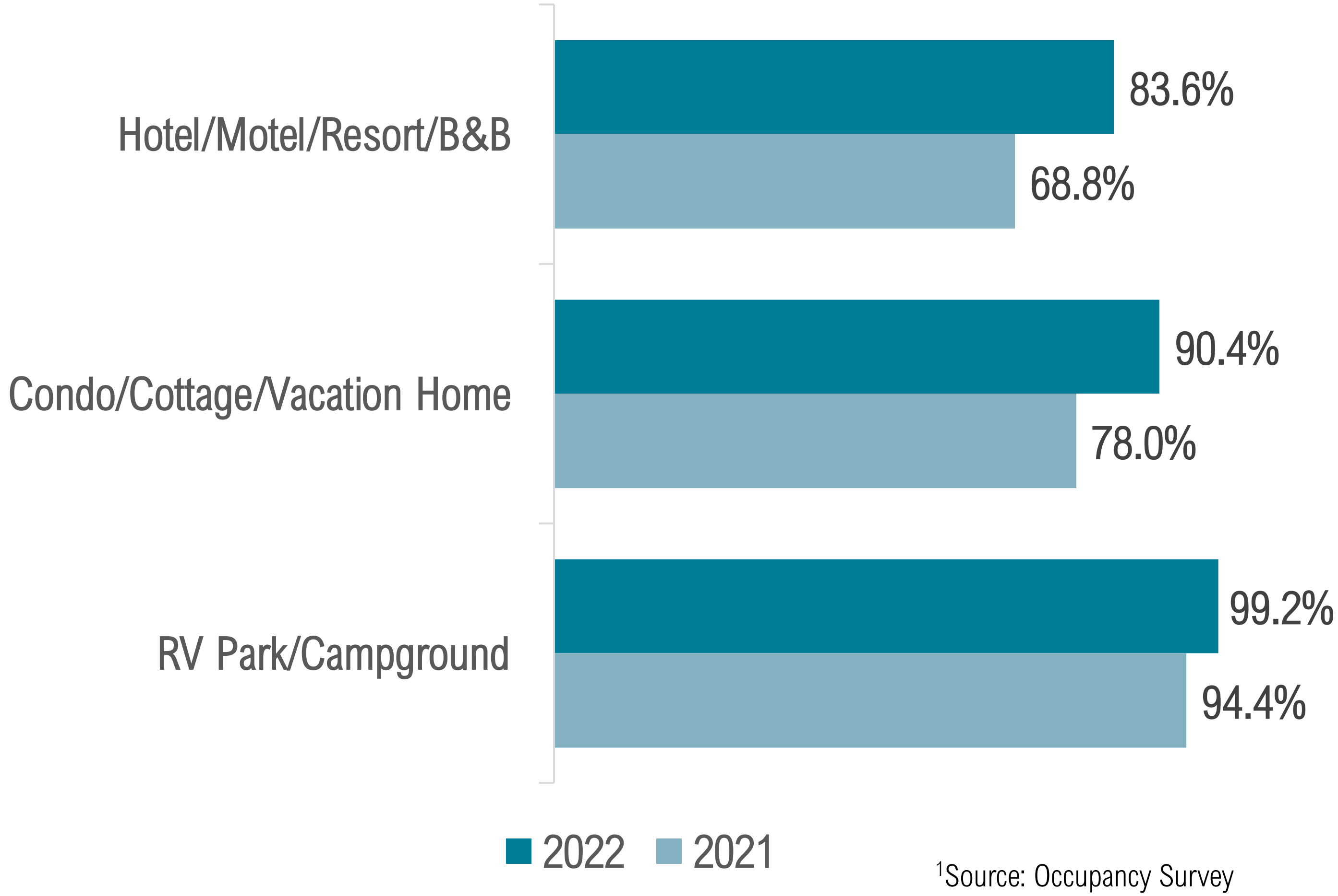
OCCUPANCY, ADR AND REVPAR



[1]Source: Occupancy Survey

OCCUPANCY

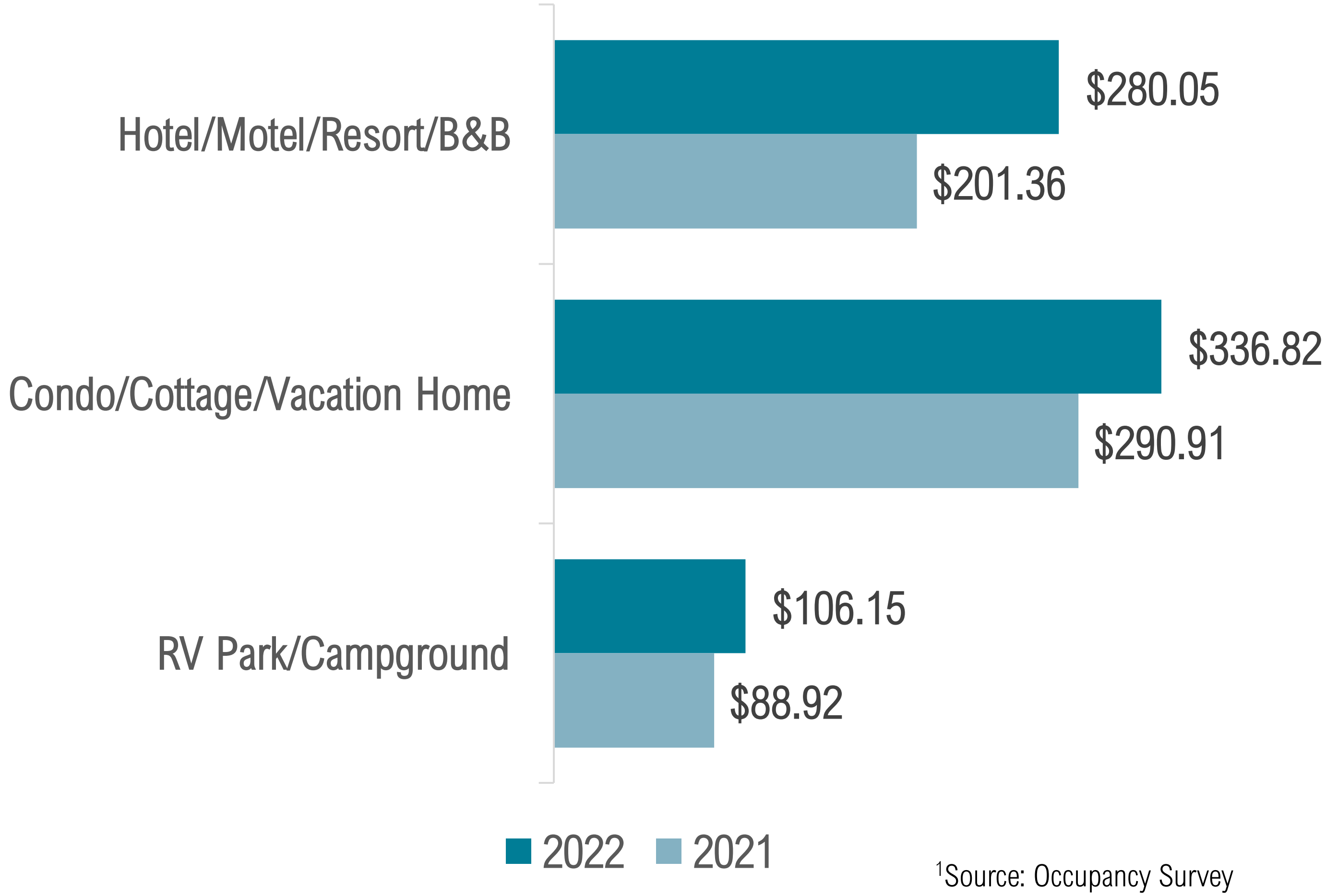
Average occupancy in Jan – Mar was 90.0% (78.8% in 2021).



[1]Source: Occupancy Survey

ADR

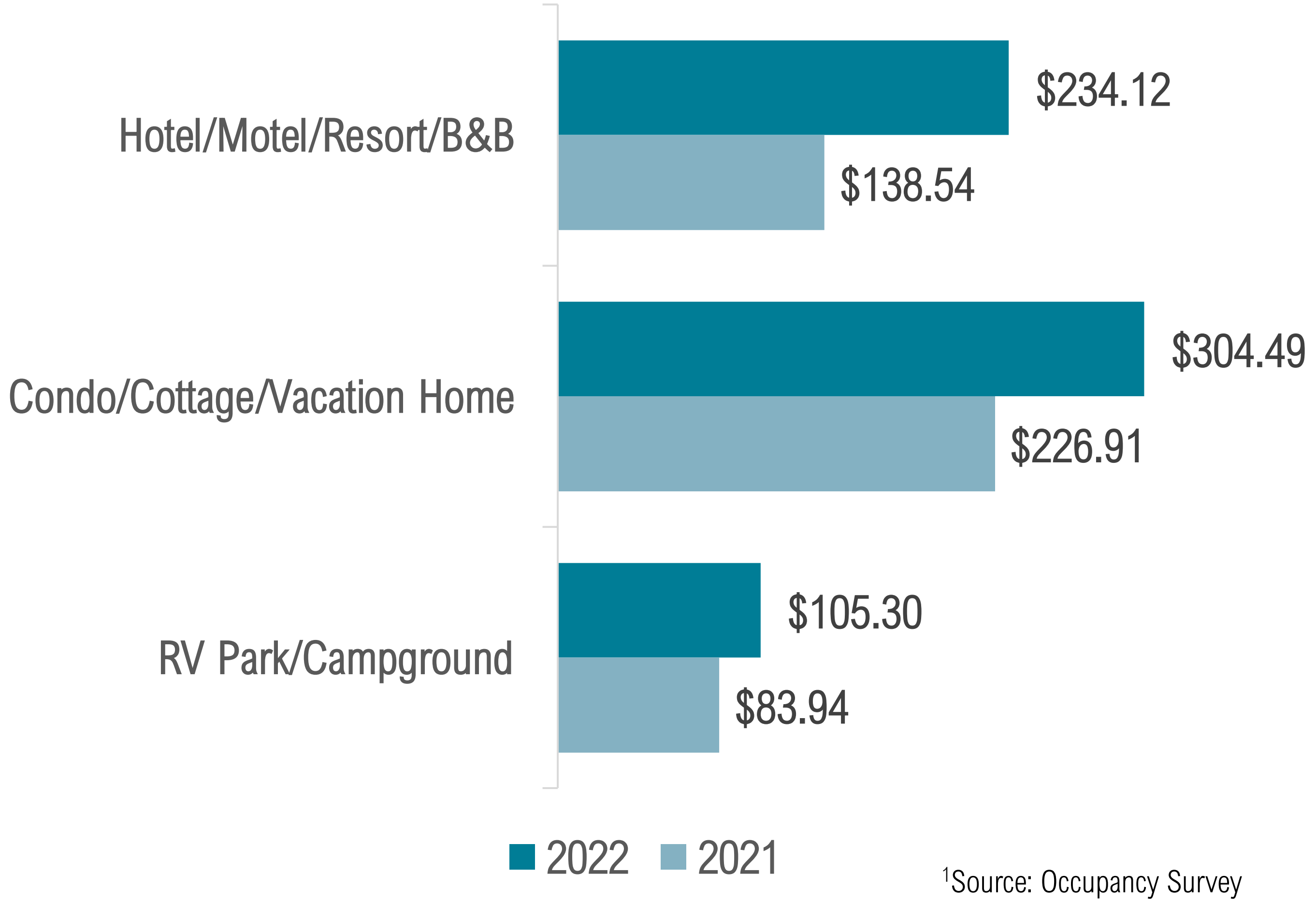
ADR in Jan – Mar was $235.29[1] ($181.23 in 2021).



[1]Source: Occupancy Survey

REVPAR

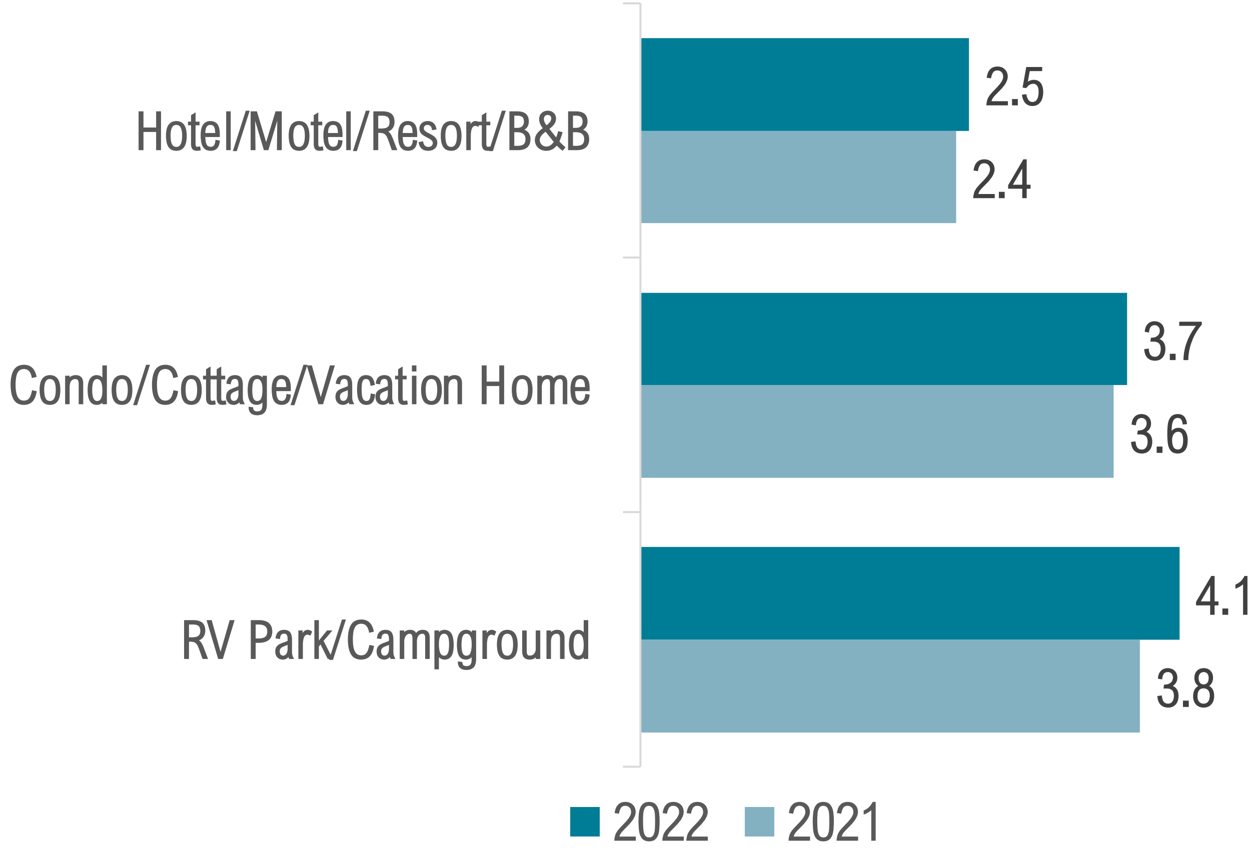
Average RevPAR in Jan – Mar was $211.84 ($142.81 in 2021).



[1]Source: Occupancy Survey

TRAVEL PARTY SIZE

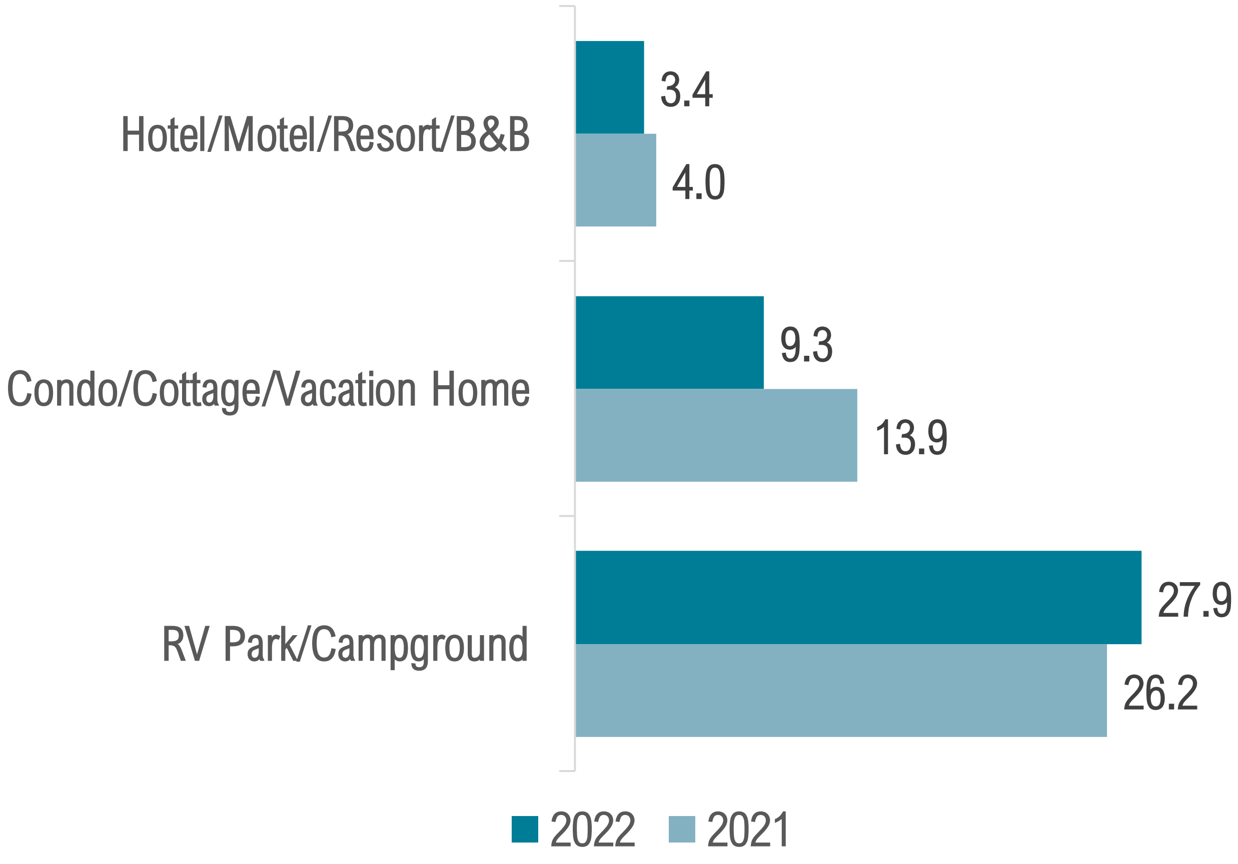
For visitors in paid accommodations, average travel party size in Jan – Mar was 2.9 people[1] (2.8 people in 2021).



[1]Source: Occupancy Survey

LENGTH OF STAY

For visitors in paid accommodations, average length of stay in Jan – Mar was 7.7 nights[1] (7.7 nights in 2021).



[1]Source: Occupancy Survey

Visitor Journey: Pre-Visit

Pre-Visit

Travel Party Profile

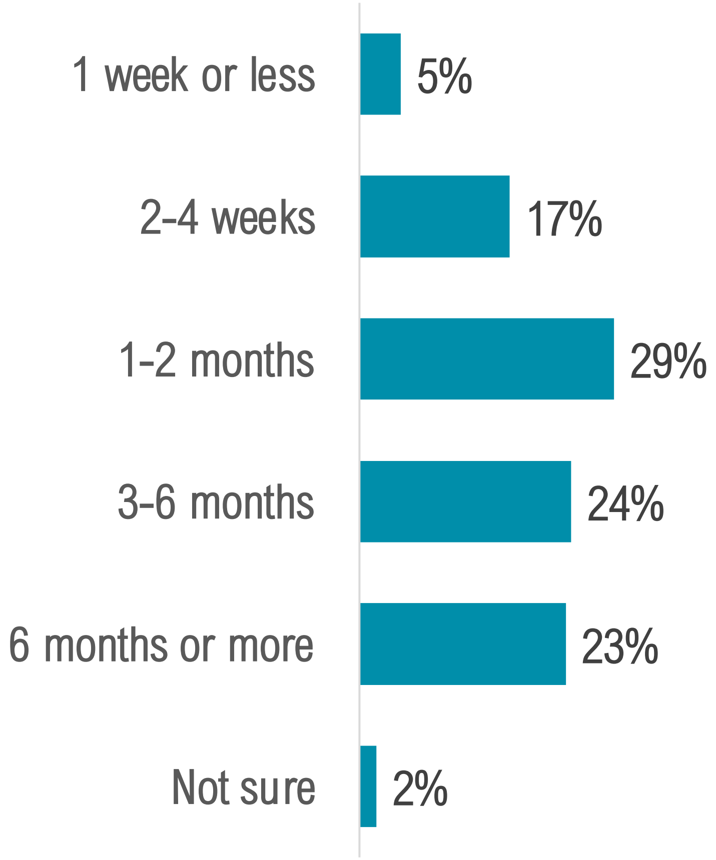
Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

TRIP PLANNING CYCLE

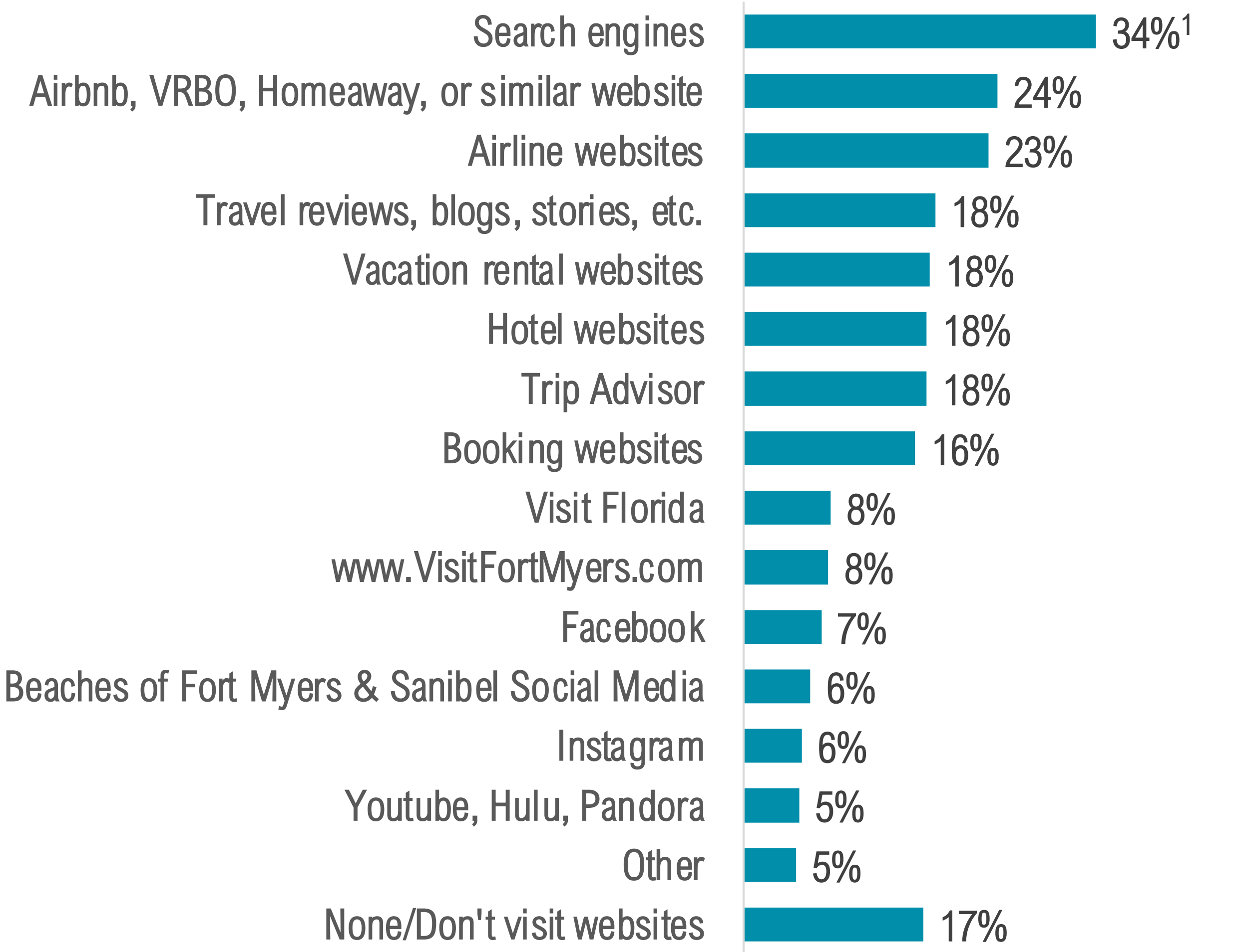
Nearly **half** of visitors planned their trip **at least 3 months** in advance.



TRIP PLANNING: WEBSITES/APPS USED

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

Visitors were more likely to use **search engines, vacation rental sites/apps**, and **airline sites/apps** to plan their trips.

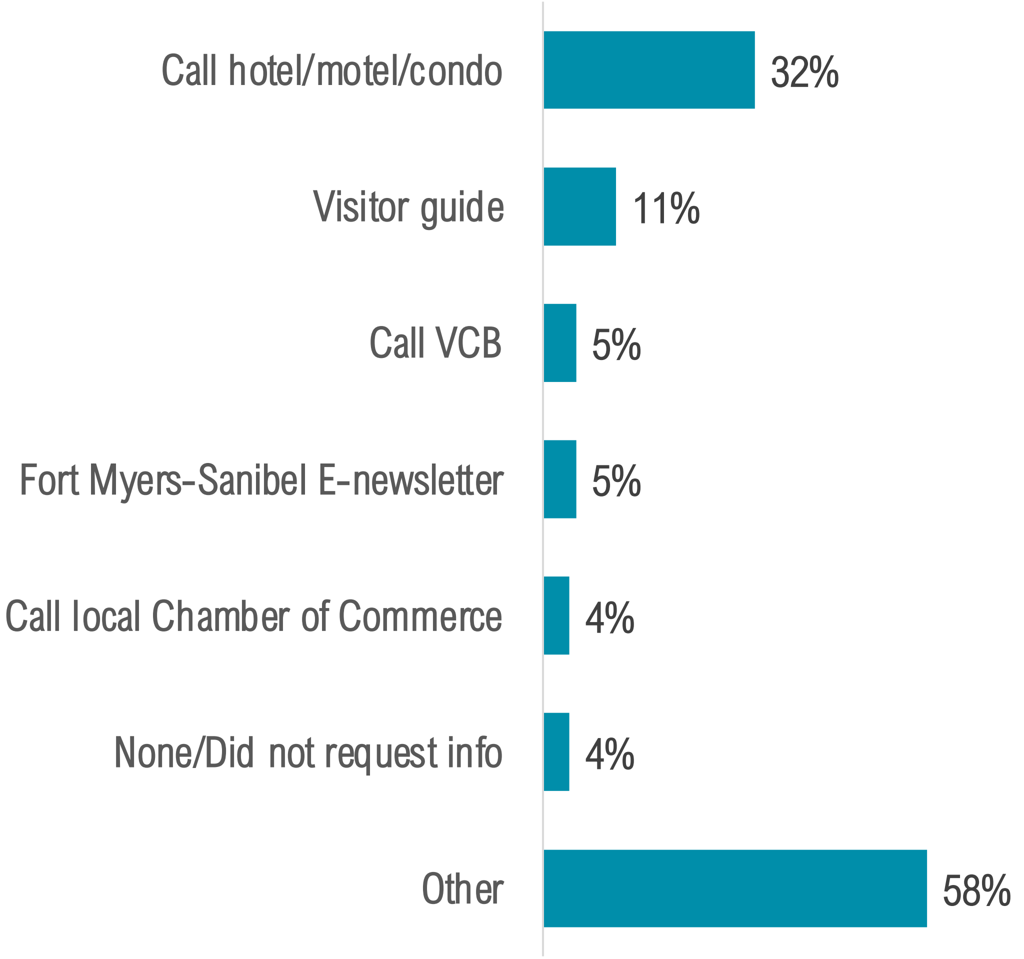


[1]Multiple responses permitted.

TRIP PLANNING: INFORMATION REQUESTS

Over 2 in 5 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 and visitor guides.

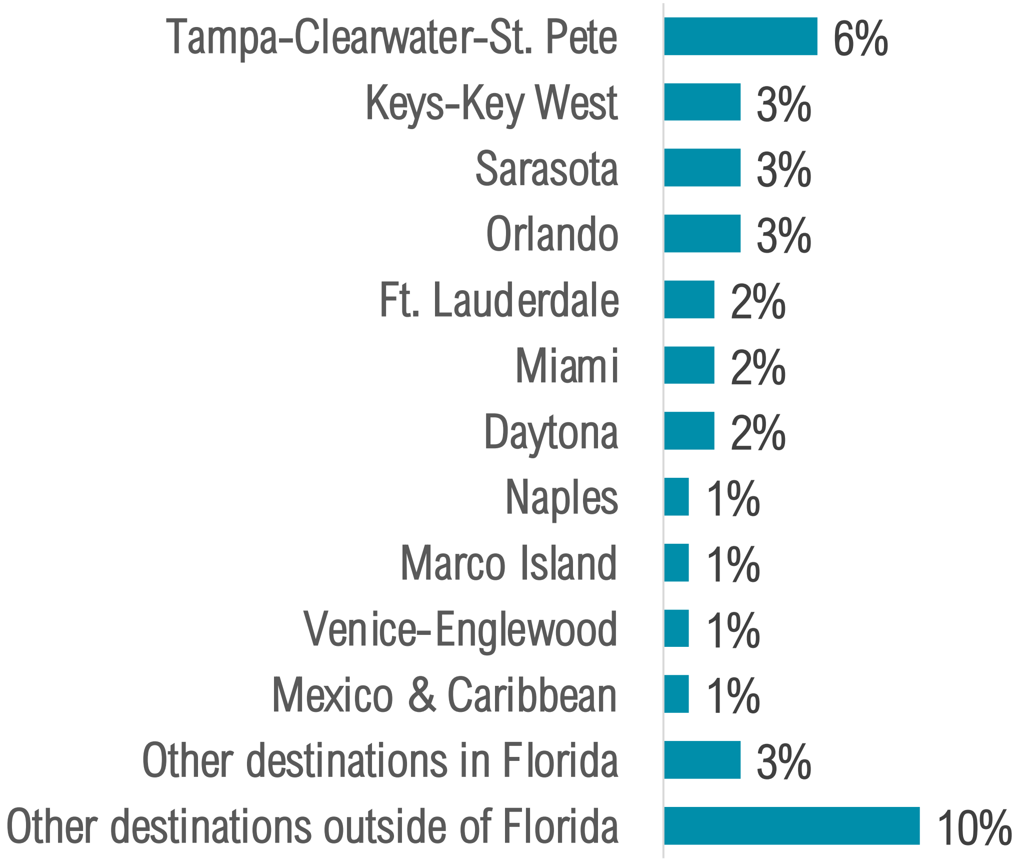


[1]Multiple responses permitted.

TRIP PLANNING: OTHER DESTINATIONS CONSIDERED

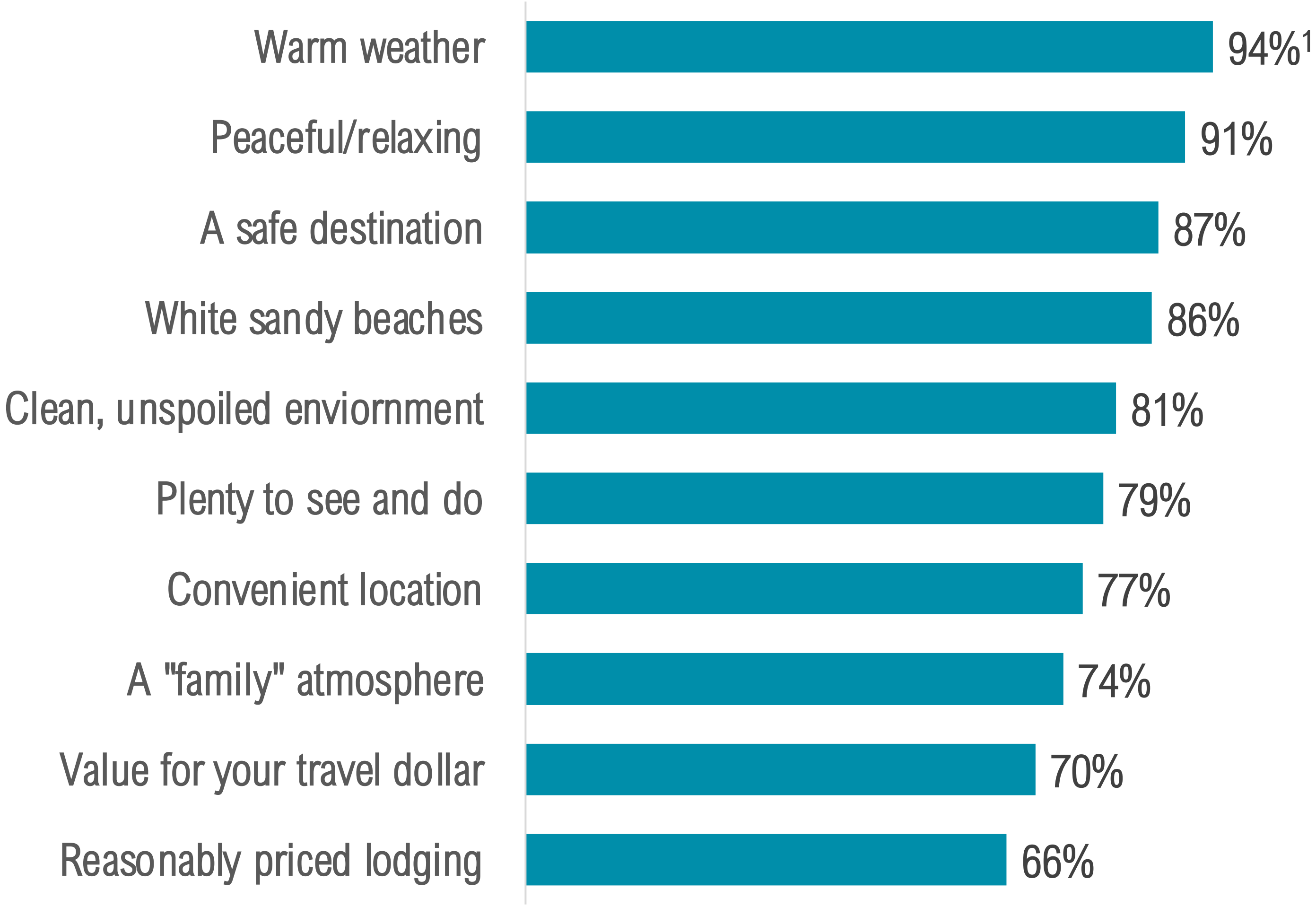
38% of visitors considered choosing other destinations when planning their trips.

Most alternative destinations were in Florida.



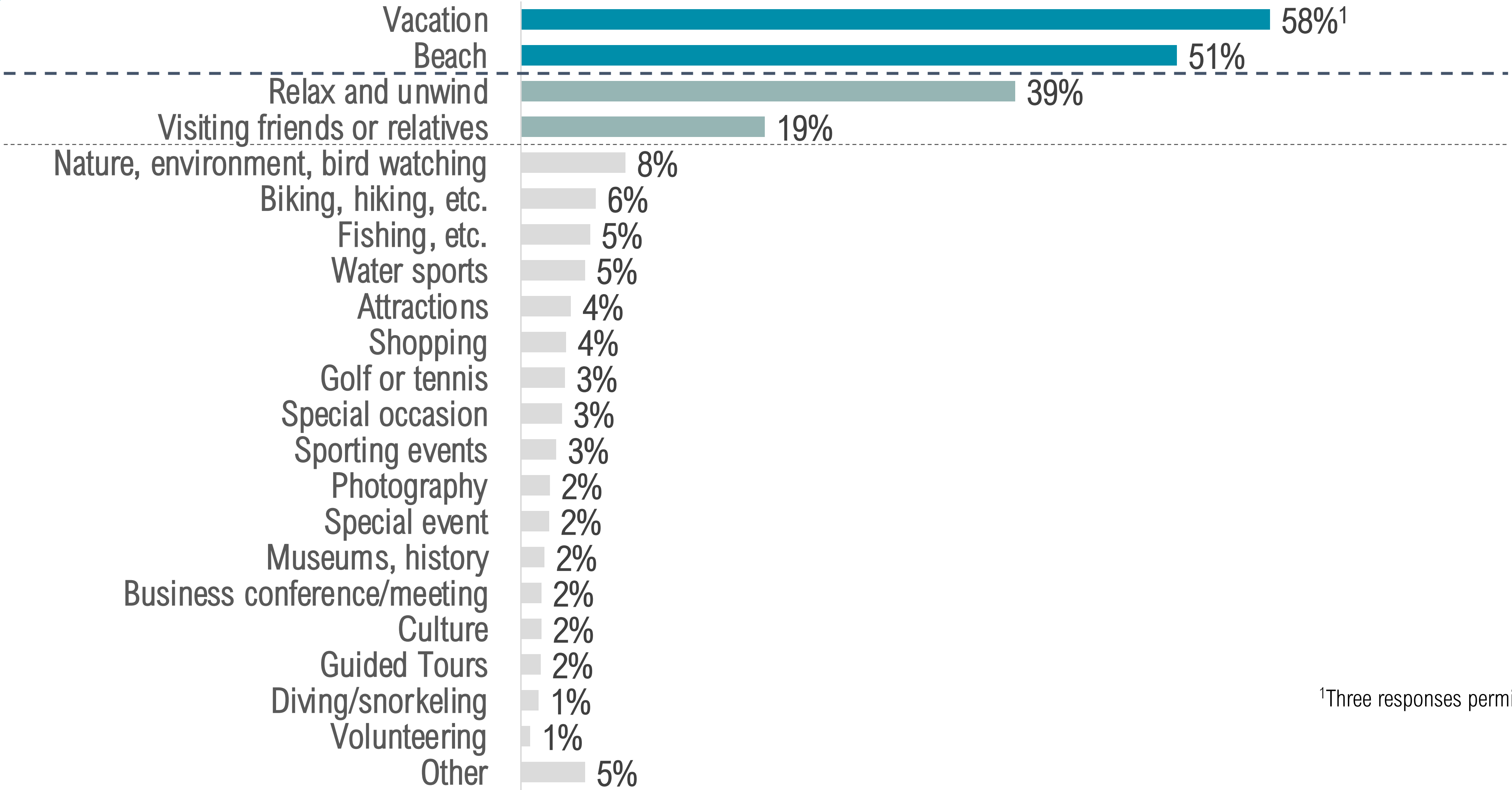
TRIP INFLUENCERS

Over 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]Three responses permitted.

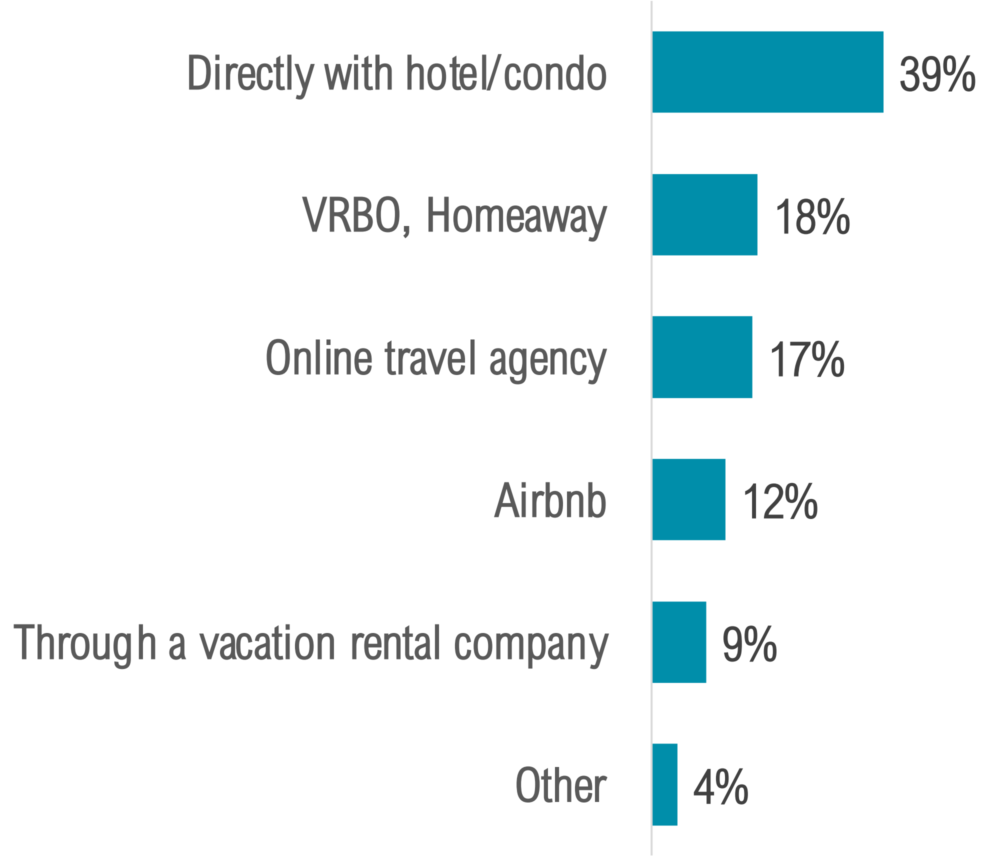
PROMOTIONS

48% of visitors recalled promotions in the past 6 months for the Fort Myers area.

[1]Multiple responses permitted.

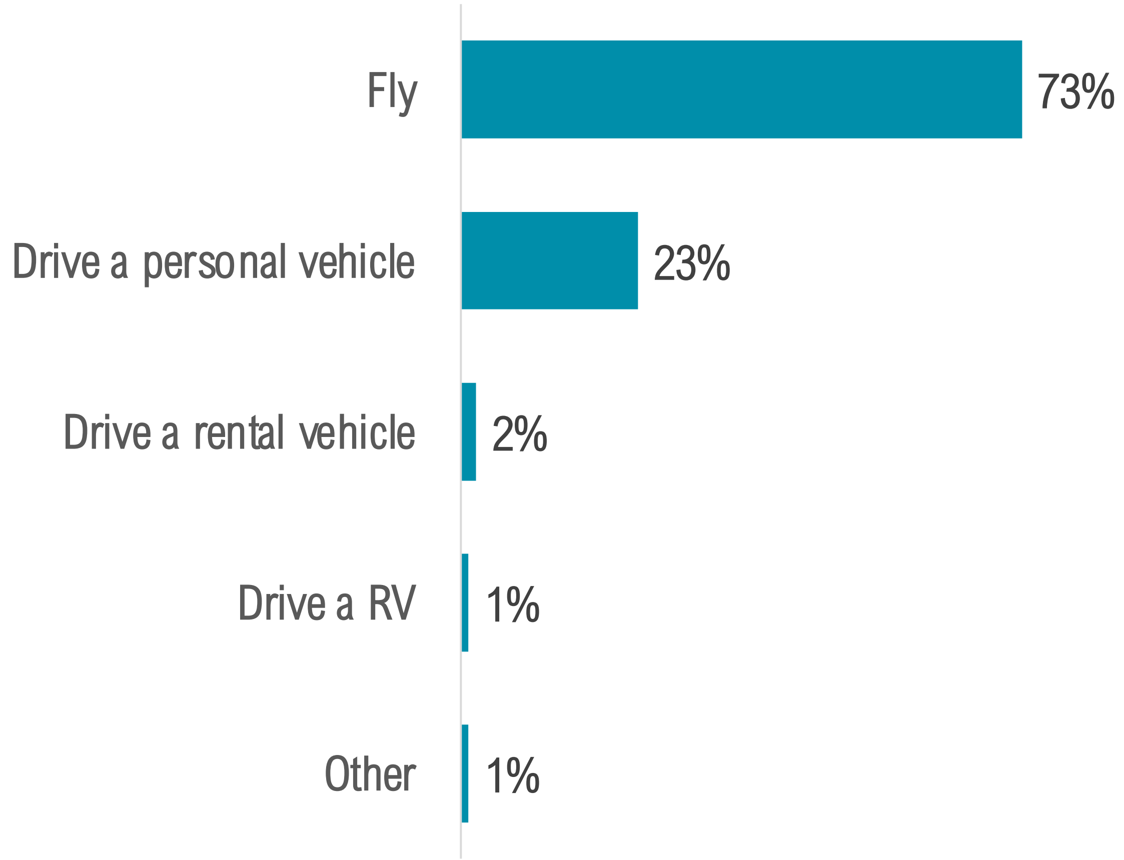
BOOKING

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



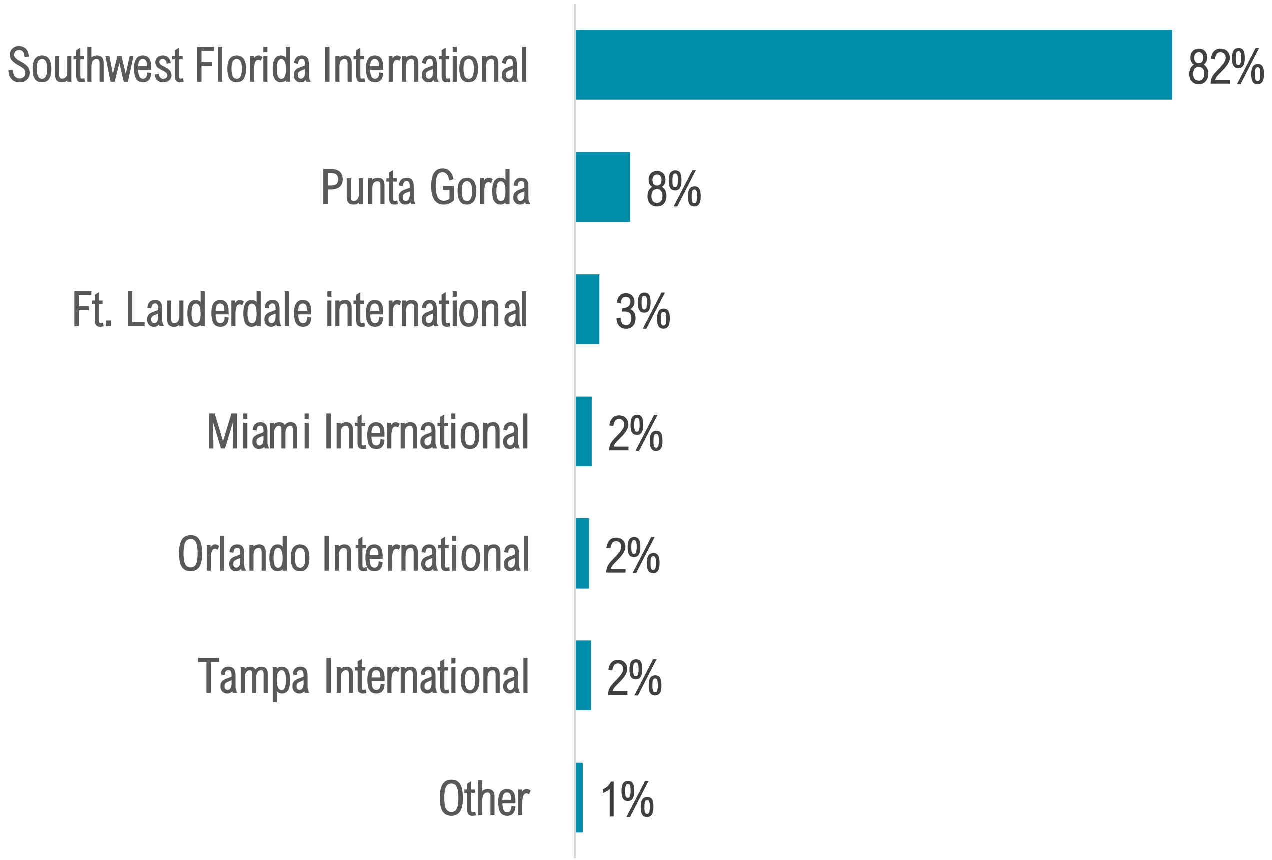
TRANSPORTATION

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



AIRPORT*

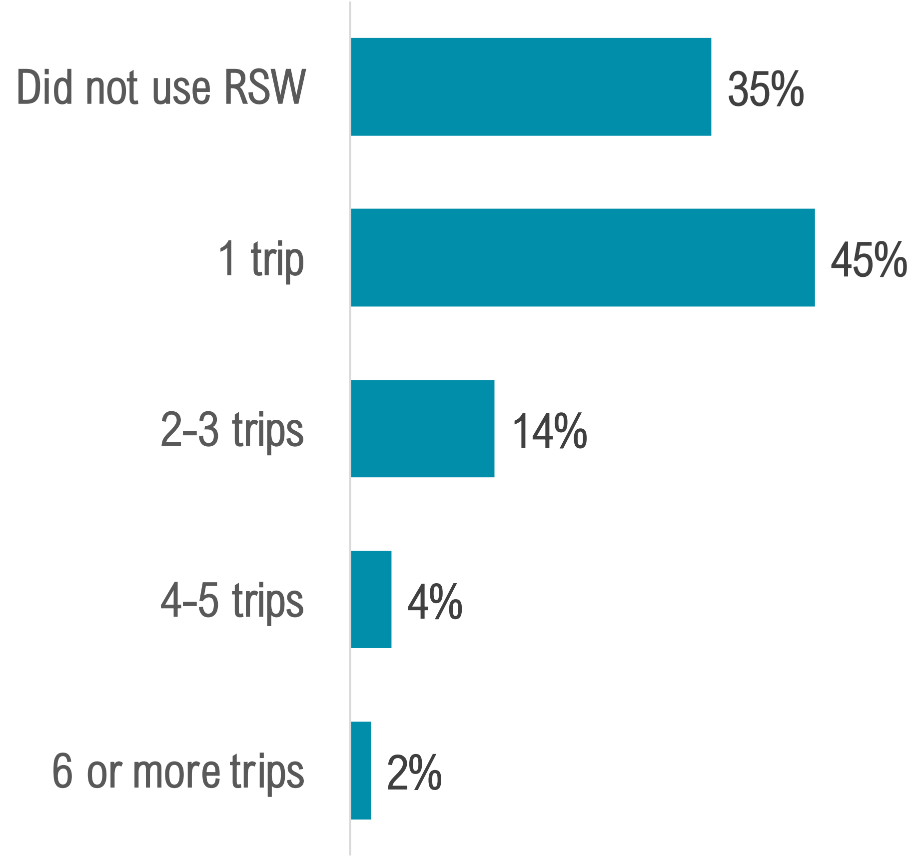
4 in 5 visitors who flew to the Fort Myers area came through RSW.



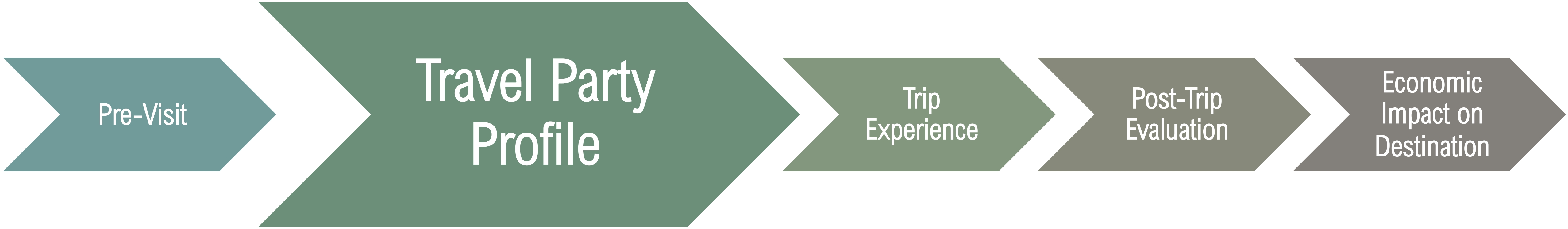
*Asked to visitors who flew

USE OF RSW IN THE PAST YEAR

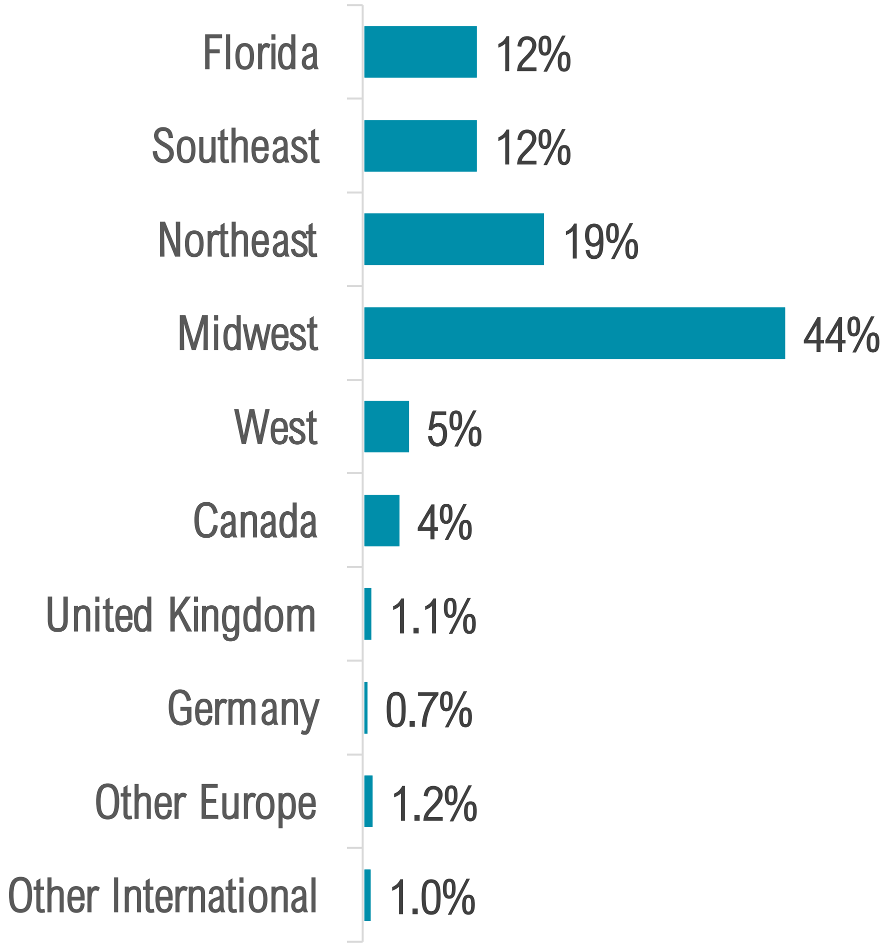
2 in 3 visitors used RSW at least once in the past year.

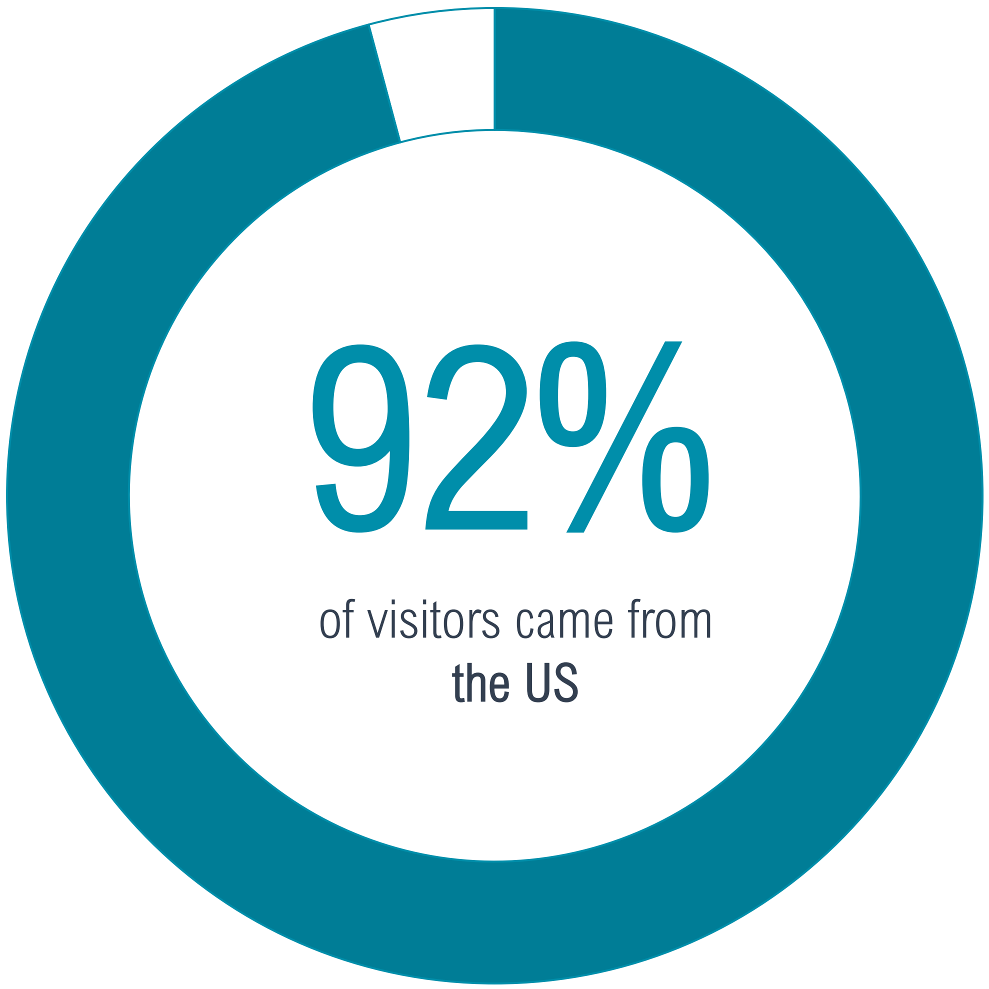


VISITOR JOURNEY: TRAVEL PARTY PROFILE



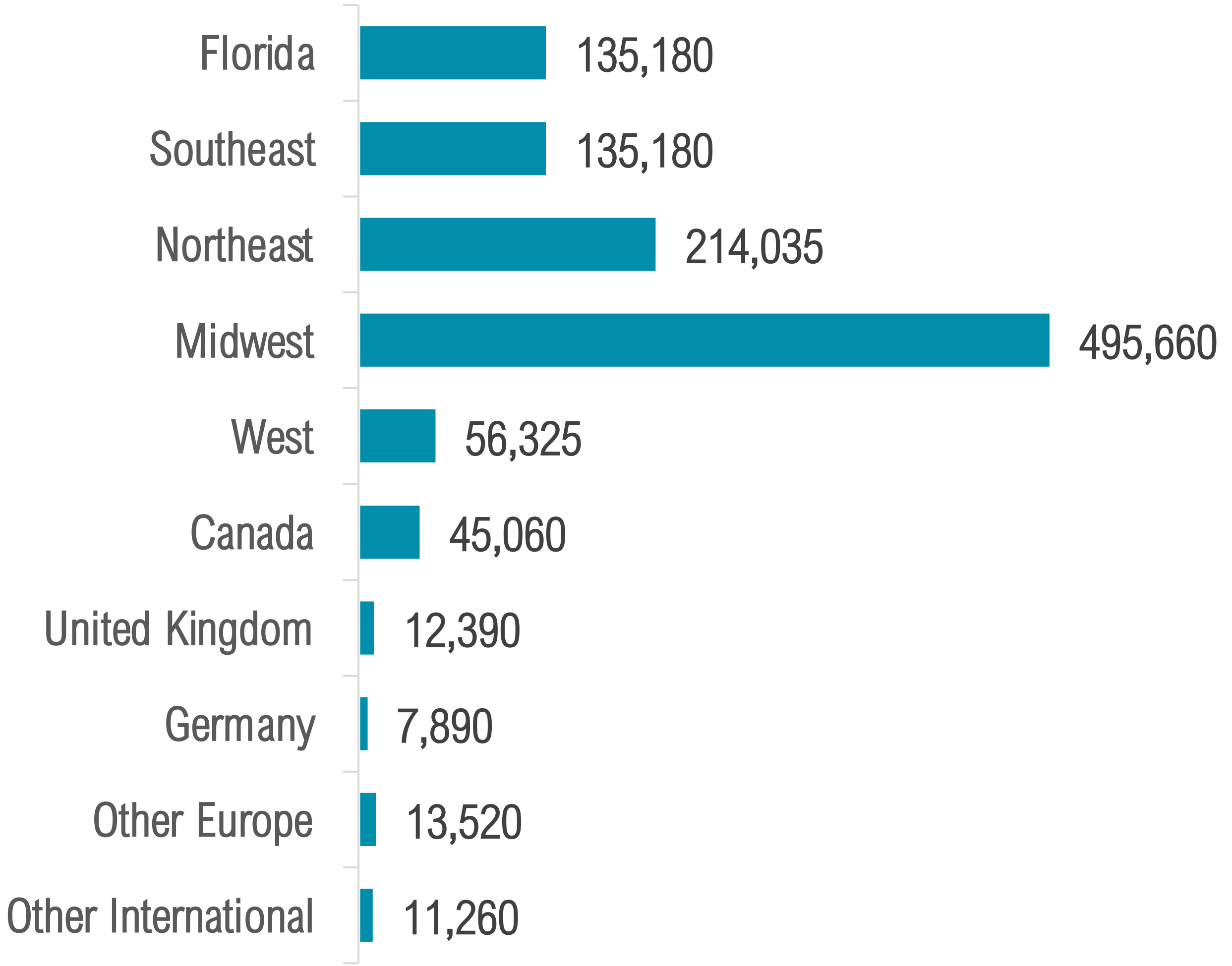
ORIGIN[1]





[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers
Based on the Visitor Tracking Study and data from Arrivalist

NUMBER OF VISITORS BY ORIGIN[1]



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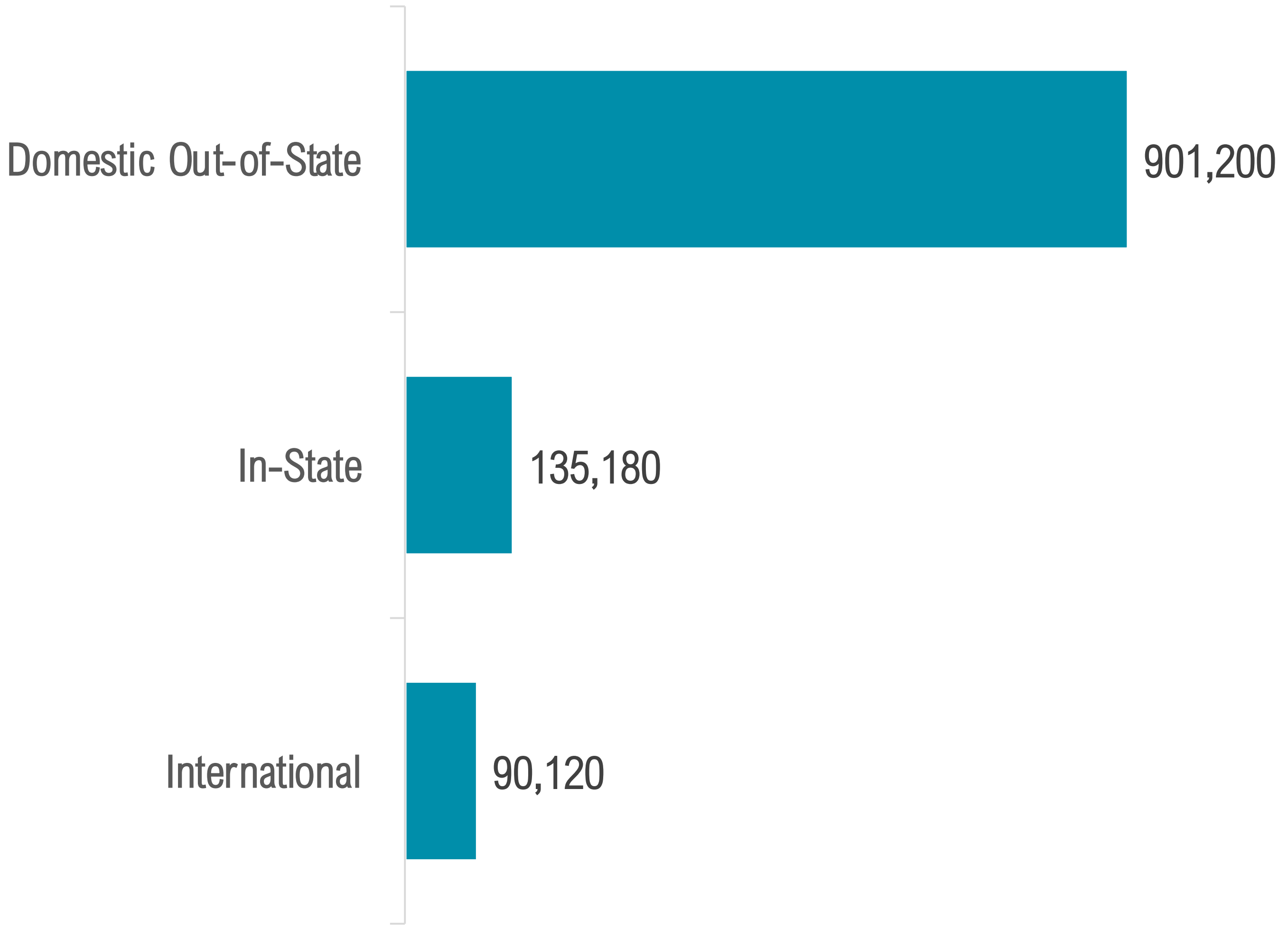
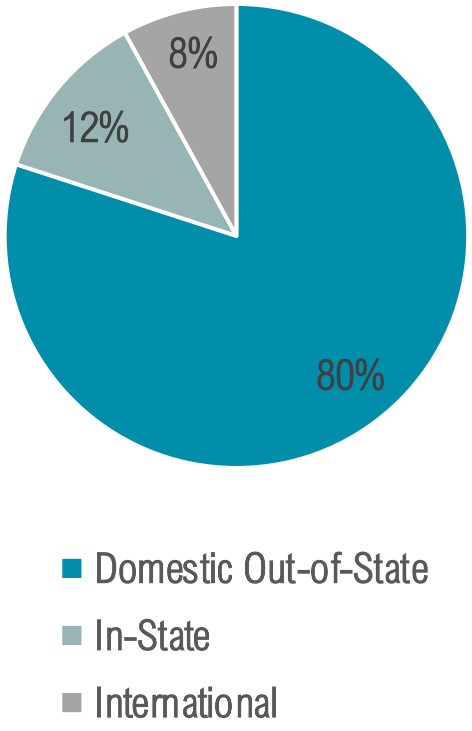
NUMBER OF VISITORS BY ORIGIN[1]

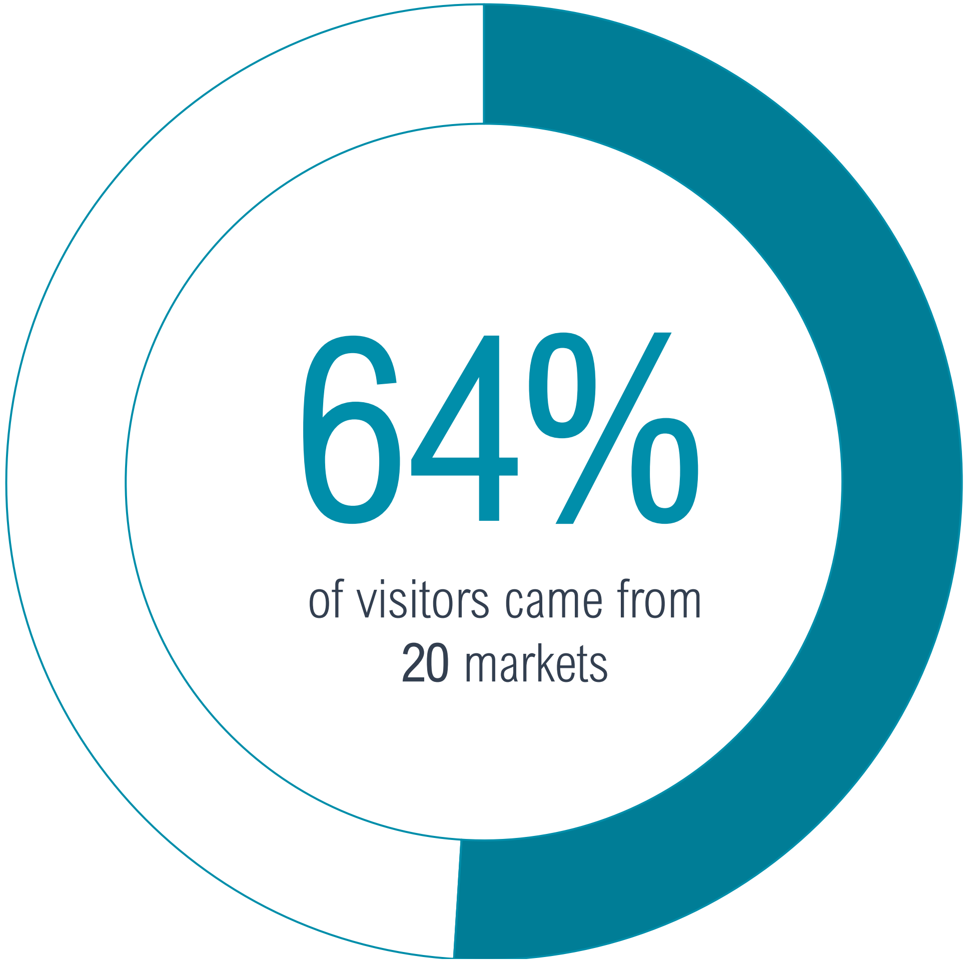




[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers
Based on the Visitor Tracking Study and data from Arrivalist

ORIGIN MARKETS[1]

Market	Percentage of Visitors
Minneapolis/Saint Paul	7%
Chicago	5%
New York City	5%
Detroit	5%
Tampa/Saint Petersburg/Clearwater	4%
Miami/Fort Lauderdale	4%
Boston	4%
Cleveland	3%
Cincinnati	3%
Milwaukee	3%
Grand Rapids/Kalamazoo/Battle Creek	3%
Indianapolis	2%
Philadelphia	2%
Green Bay/Appleton	2%
Atlanta	2%
Washington DC-Baltimore	2%
Orlando/Daytona Beach/Melbourne	2%
Columbus, OH	2%
Saint Louis	2%
Pittsburgh	2%



[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers
Based on the Visitor Tracking Study and data from Arrivalist

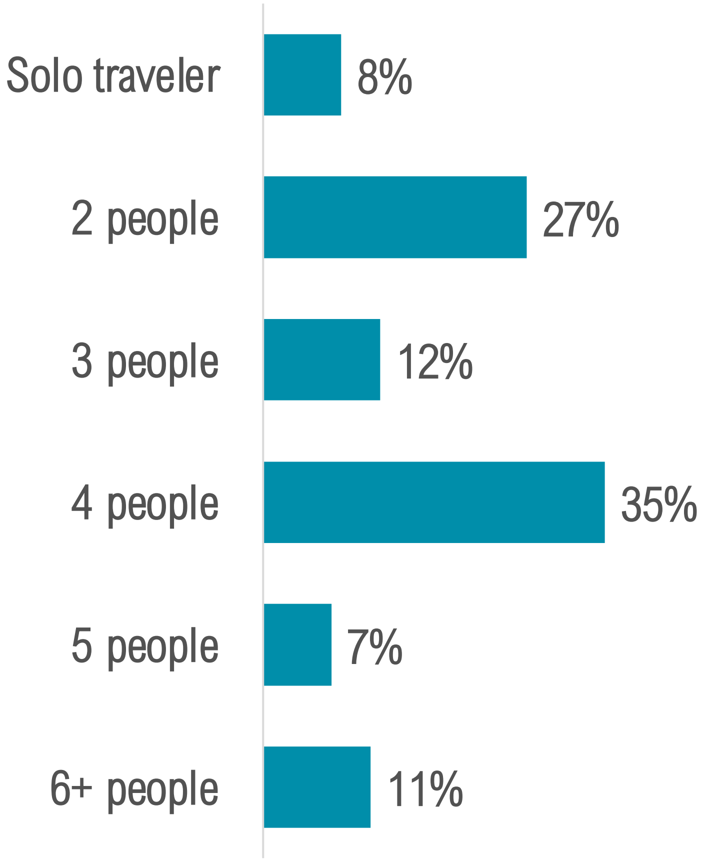
TRAVEL PARTY SIZE AND COMPOSITION

Travel Party Size

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

Travel with Children

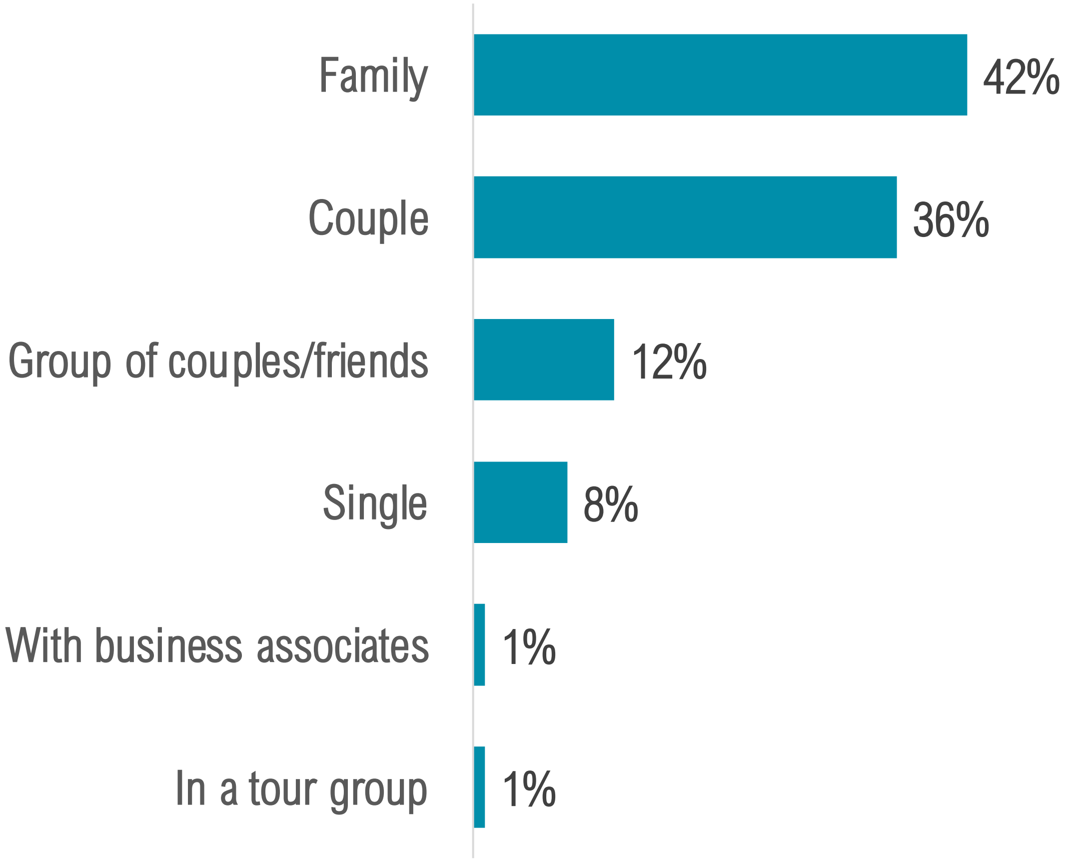
27% of visitors traveled with children under the age of 18.



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

TRAVEL PARTY TYPE

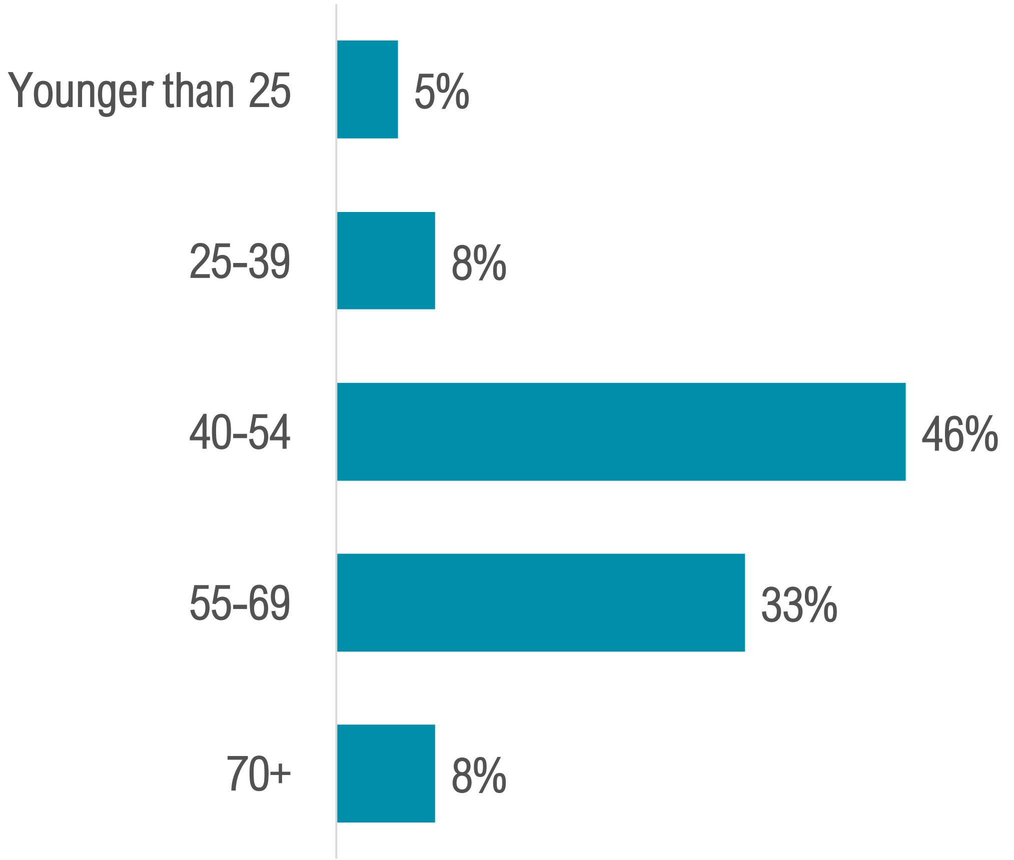
42% of visitors traveled as a family, while 36% traveled as a couple.



AGE

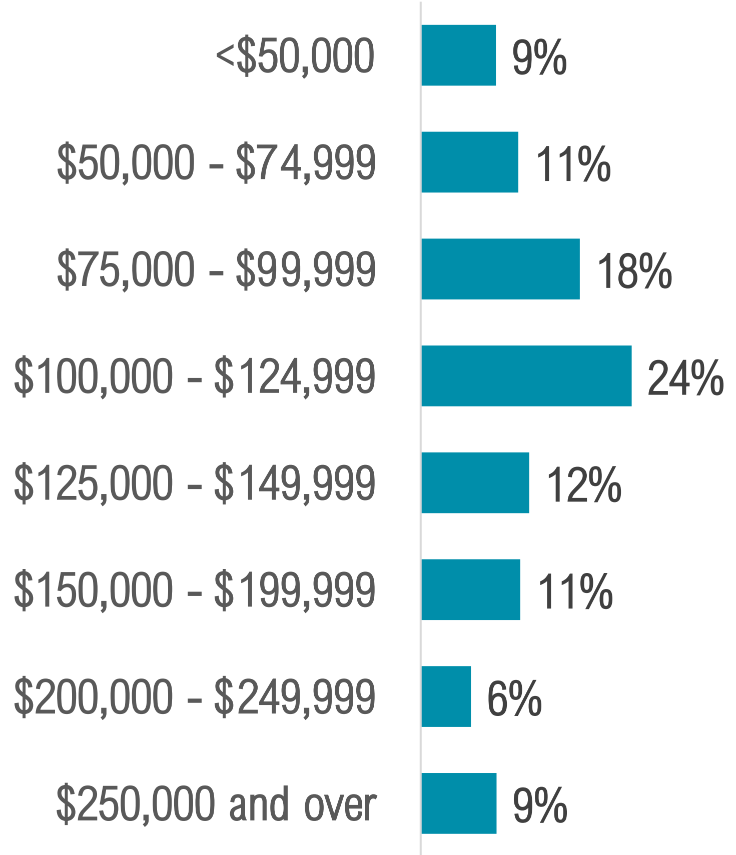
Average Age

The average age of Jan – Mar visitors was 52 years old.

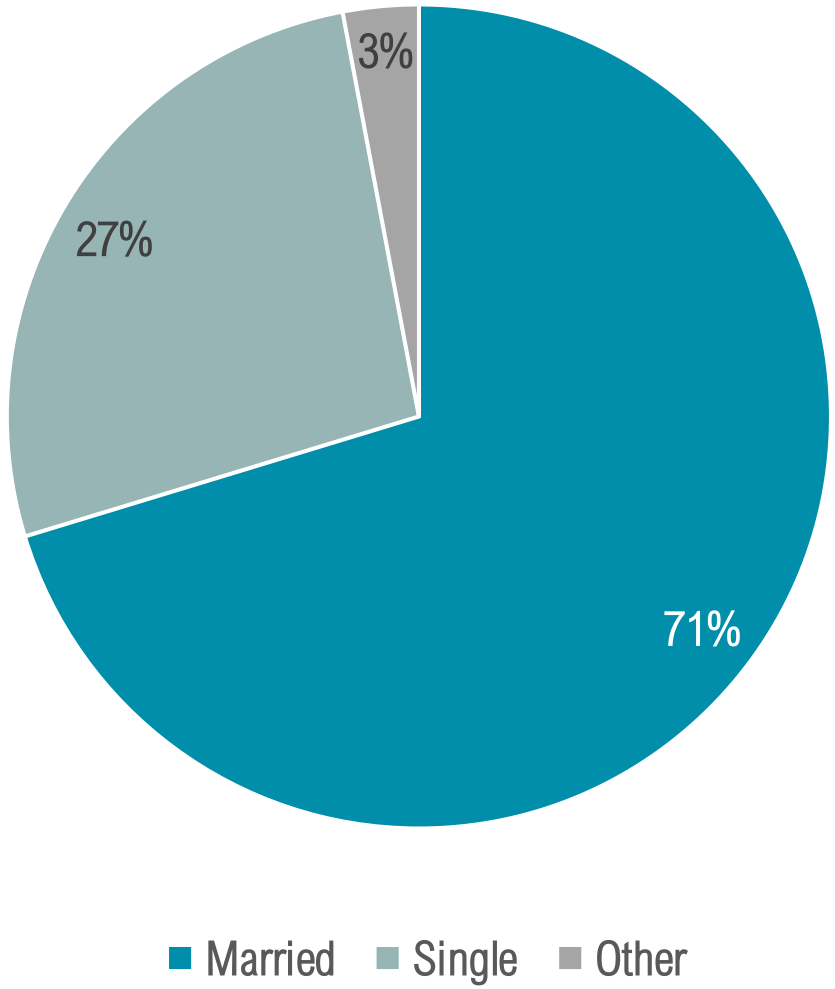


HOUSEHOLD INCOME

Median Household Income
Jan – Mar visitors had a median household income of **$112,500.**

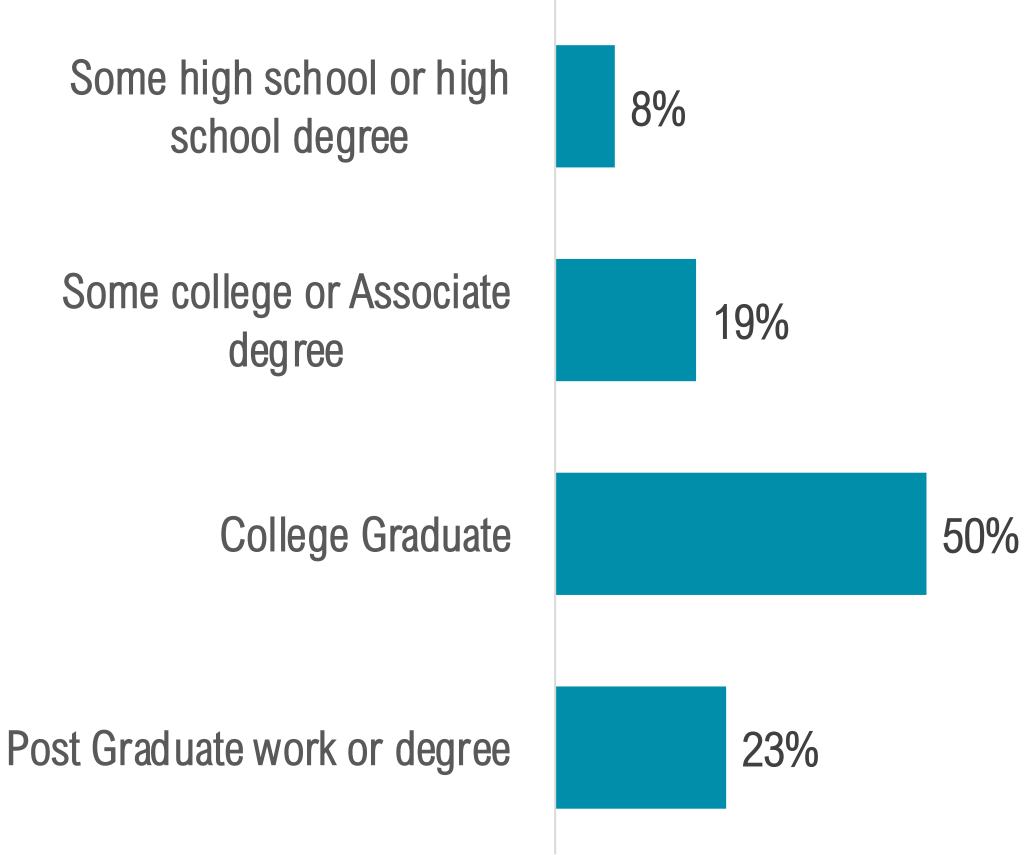


MARITAL STATUS

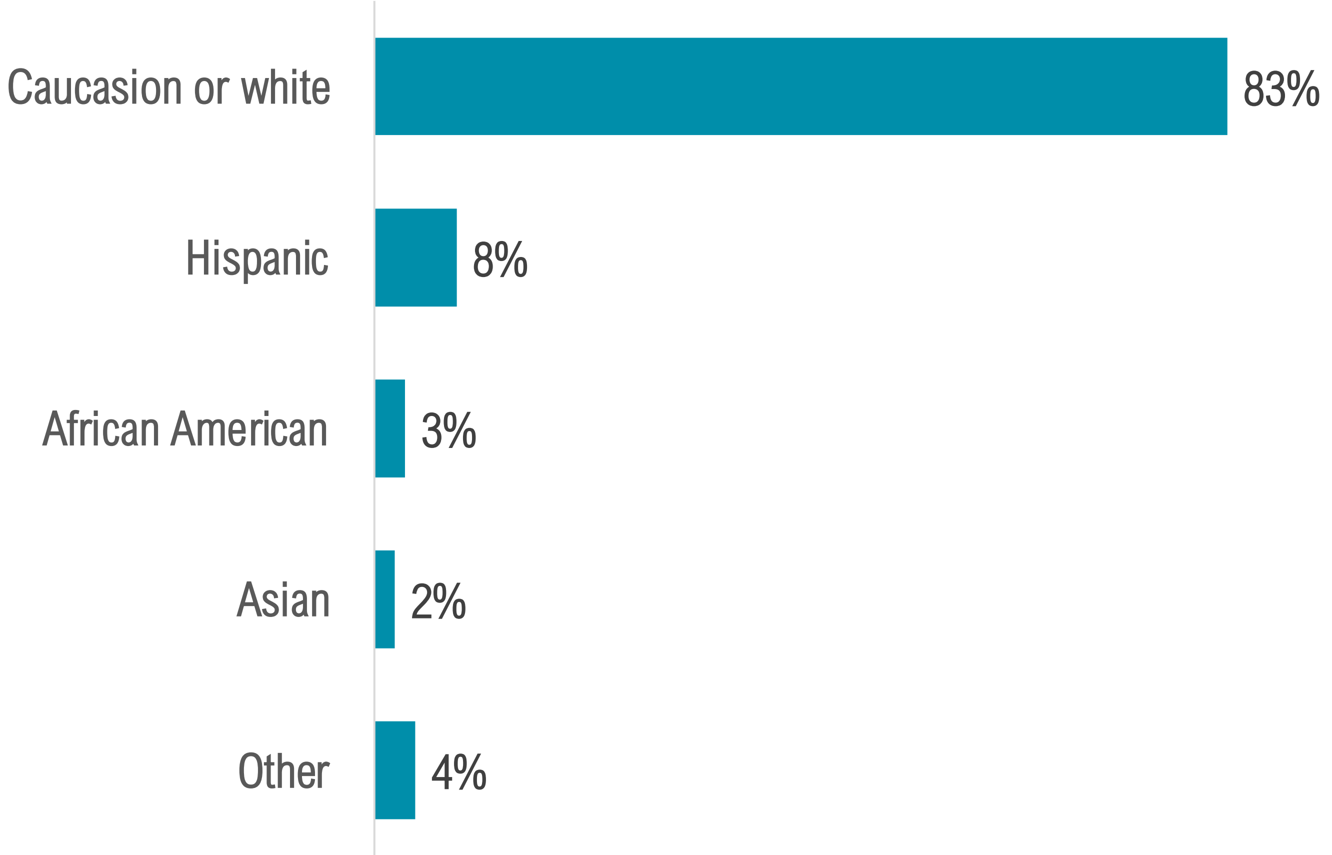


EDUCATION

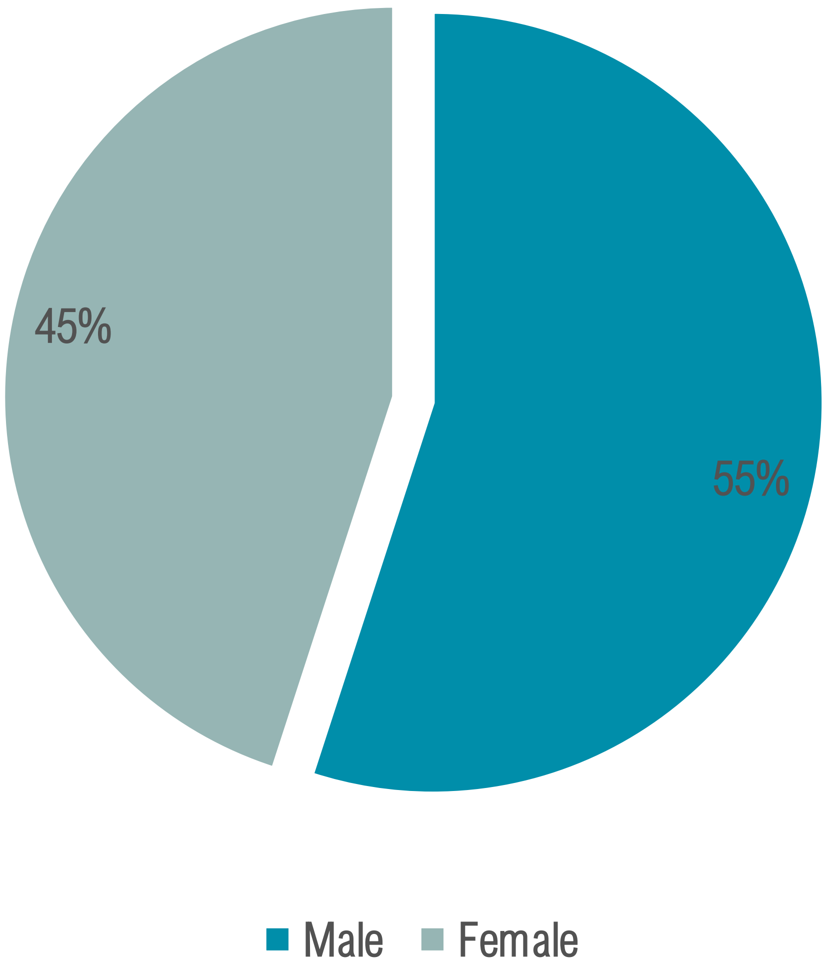
College Education
73% of Jan – Mar visitors were college graduates.



RACE/ETHNICITY



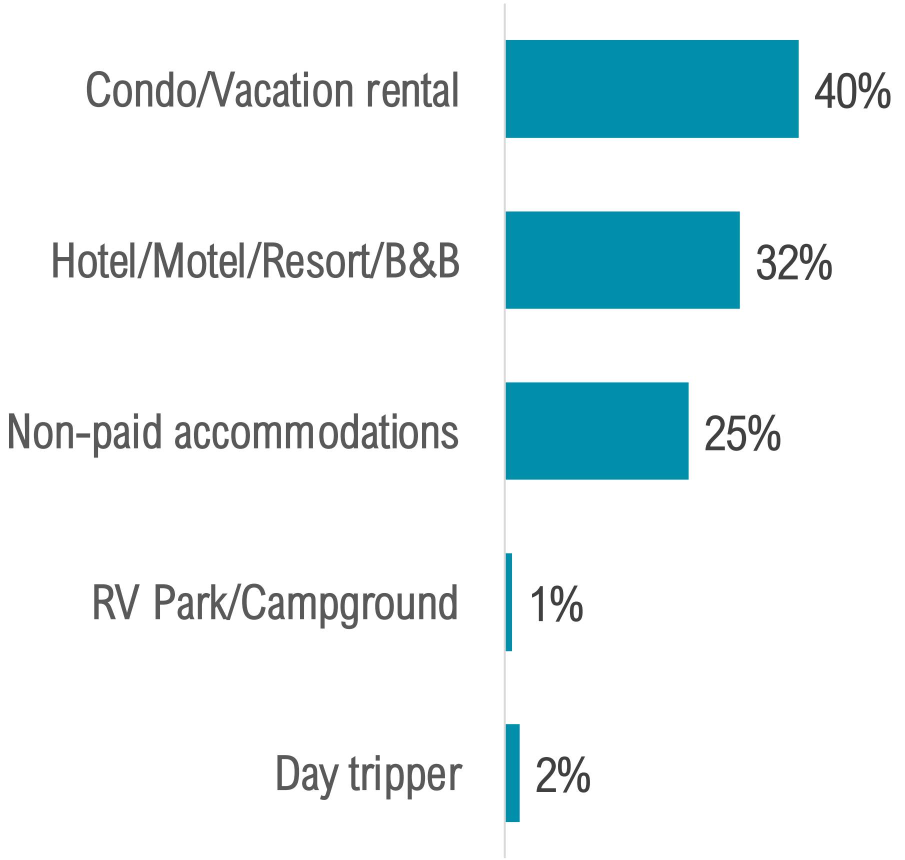
GENDER



VISITOR JOURNEY: TRIP EXPERIENCE

ACCOMMODATIONS

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



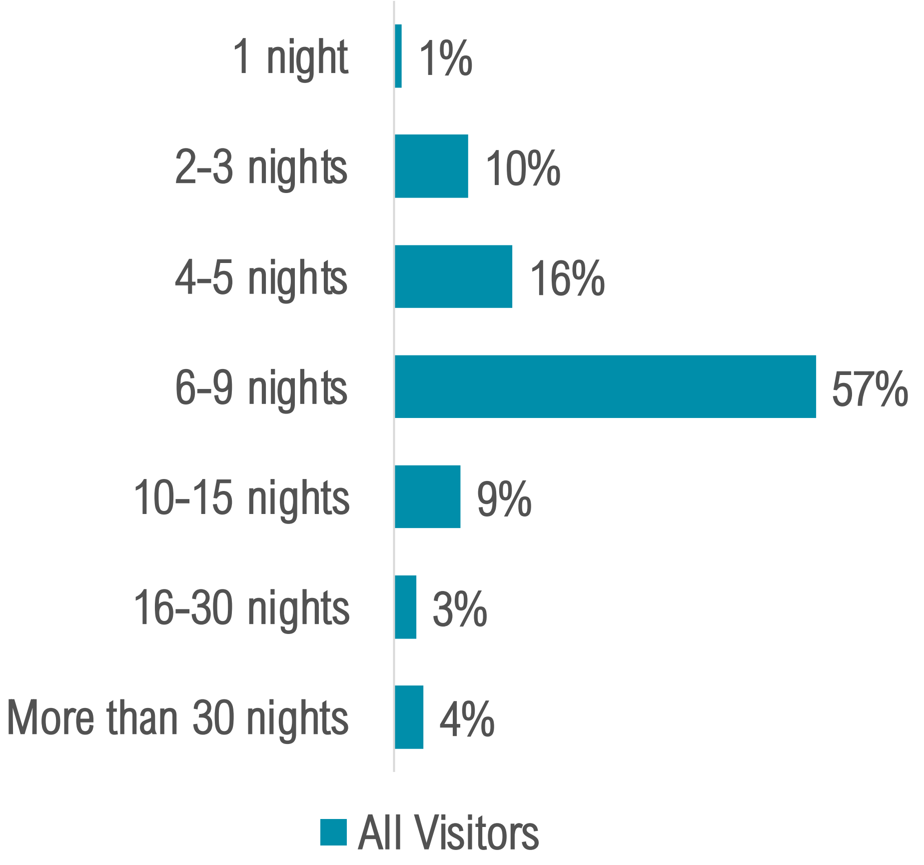
NIGHTS STAYED

All Visitors

Visitors spent **8.8[1] nights** in the Fort Myers area.

Visitors Staying in Paid Accommodations

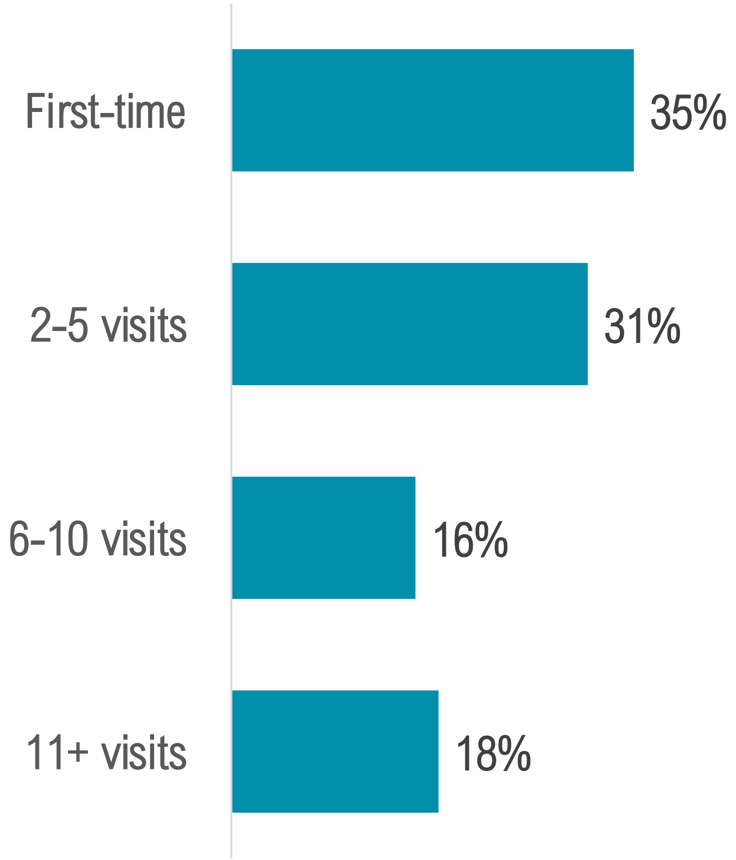
Visitors staying in paid accommodations spent **7.7[2] nights** in the Fort Myers area.



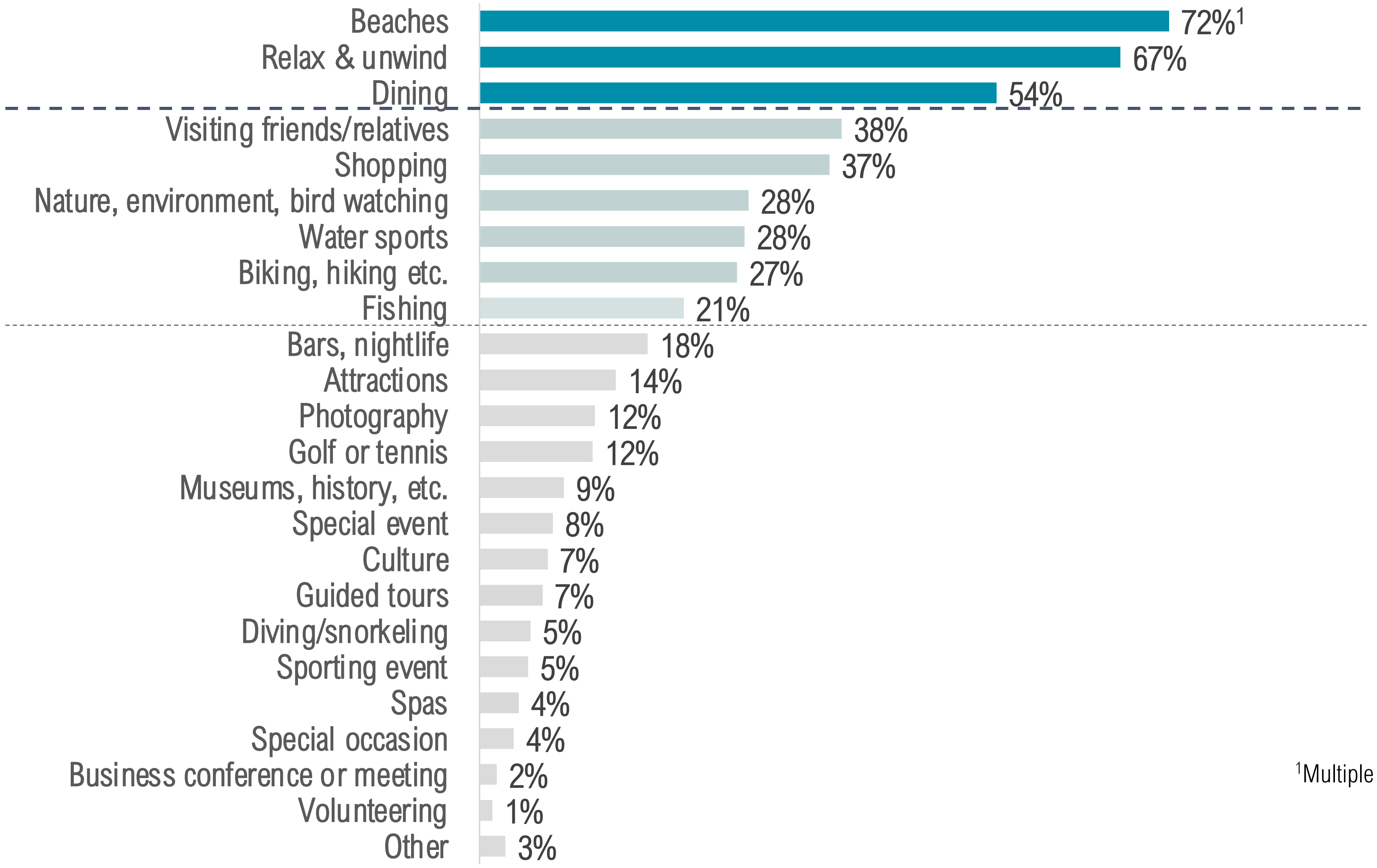
[1]Source: Visitor Tracking Survey
[2]Source: Occupancy and Visitor Tracking Survey

FIRST TIME AND EXPERIENCED VISITORS

Over 1 in 3 visitors were visiting for the first time, while nearly 1 in 5 were highly loyal visitors, having visited more than 10 times.



VISITOR ACTIVITIES



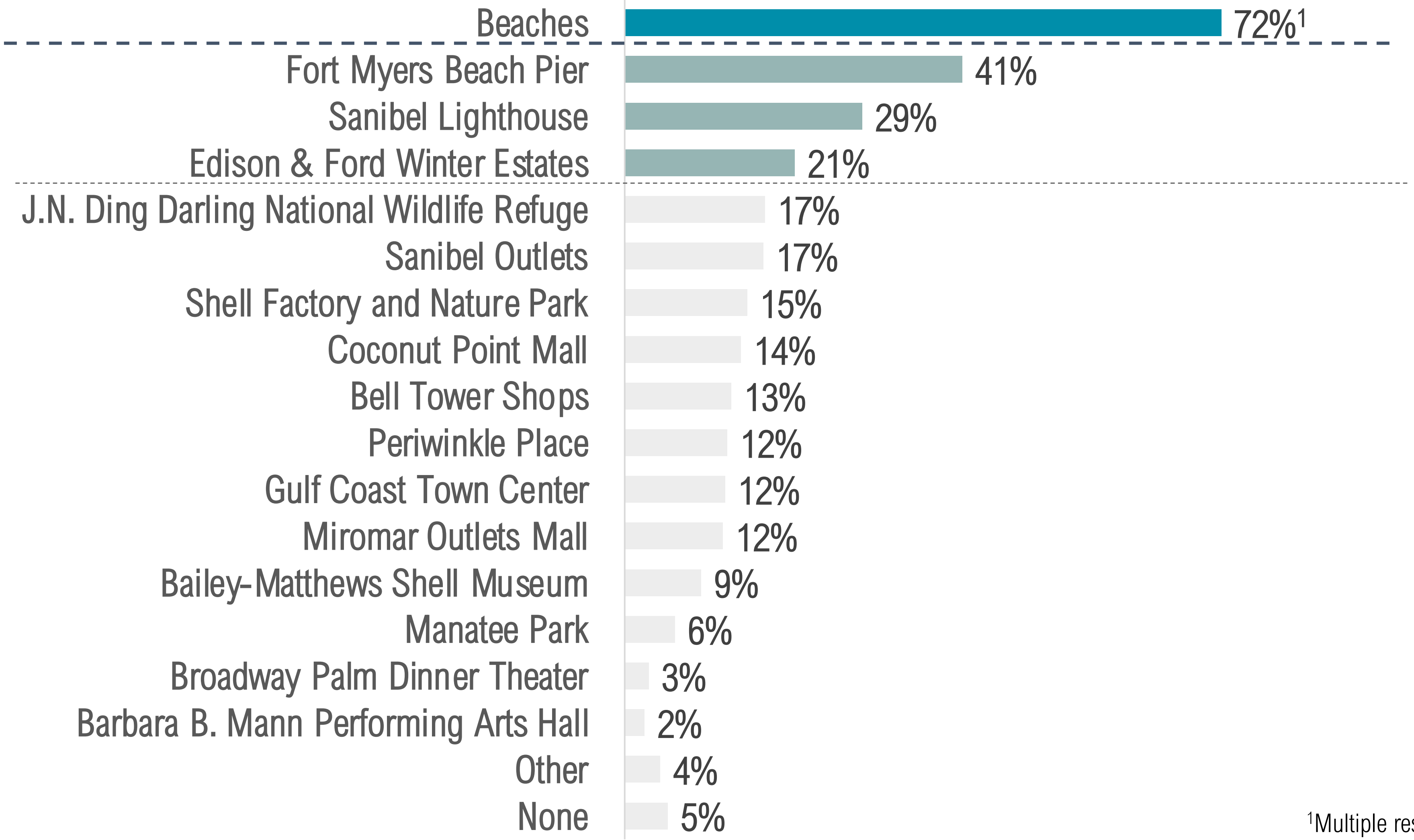
[1]Multiple responses permitted.

REASON FOR VISITING VS. VISITOR ACTIVITIES

	Reason for Visiting		Visitor Activities
Key Reasons for Visiting	51%[1]	Beaches	72%[2]
	39%	Relax & unwind	67%
	19%	Visiting friends/relatives	38%
Trip Enhancements	8%	Nature	28%
	6%	Biking, hiking etc.	27%
	5%	Fishing	21%
	5%	Water sports	28%
	4%	Attractions	14%
	4%	Shopping	37%
	3%	Golf or tennis	12%
	3%	Special occasion	4%
	3%	Sporting event	5%
	2%	Photography	12%
	2%	Special event	8%
	2%	Museums	9%
	2%	Business	2%
	2%	Culture	7%
	2%	Guided tours	7%
	1%	Diving/snorkeling	5%
	1%	Volunteering	1%

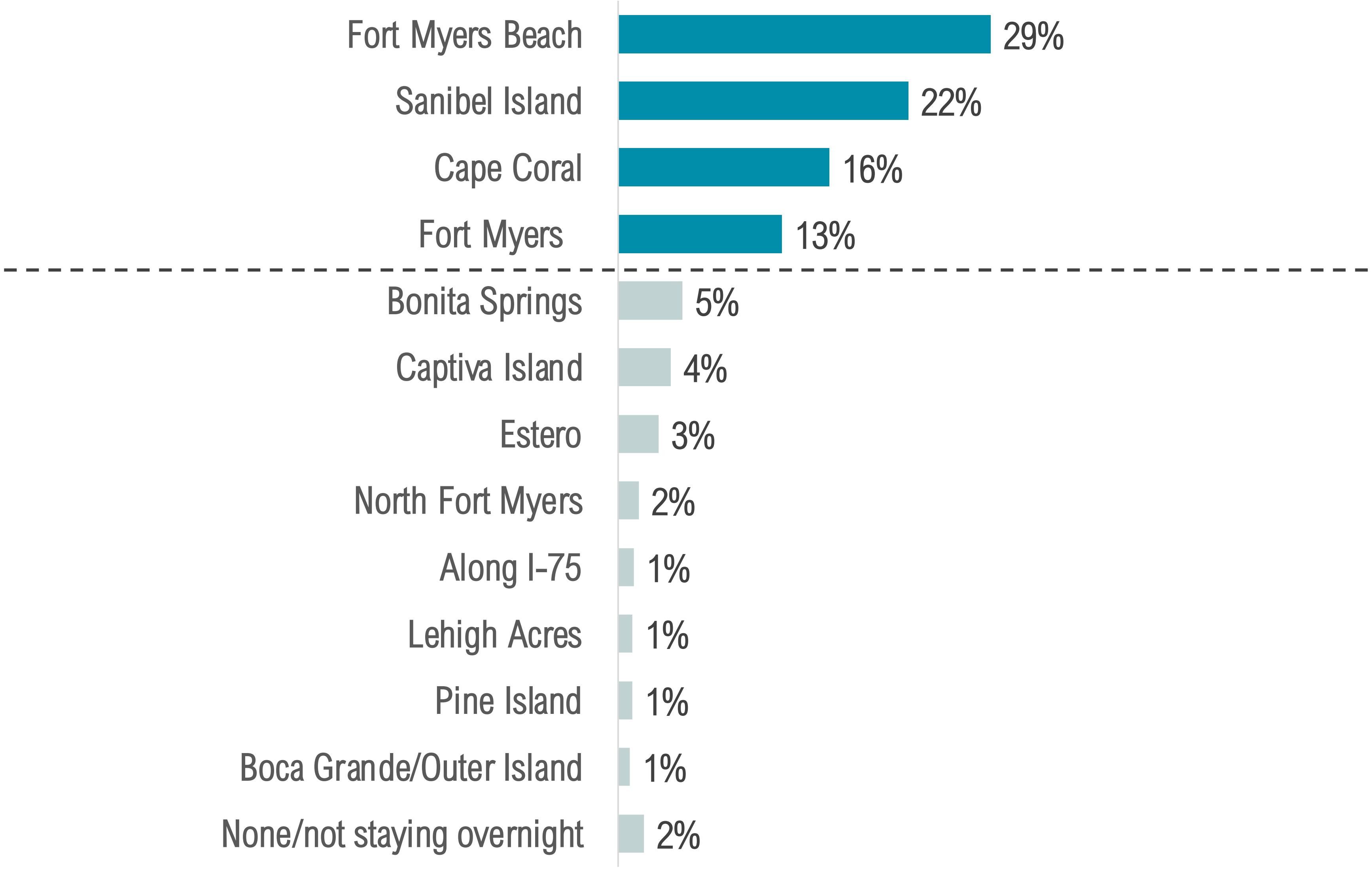
[1]Three responses permitted.
[2]Multiple responses permitted.

ATTRACTIONS VISITED



[1]Multiple responses permitted.

COMMUNITY STAYED



VISITOR JOURNEY: POST-TRIP EVALUATION

Pre-Visit

Travel Party Profile

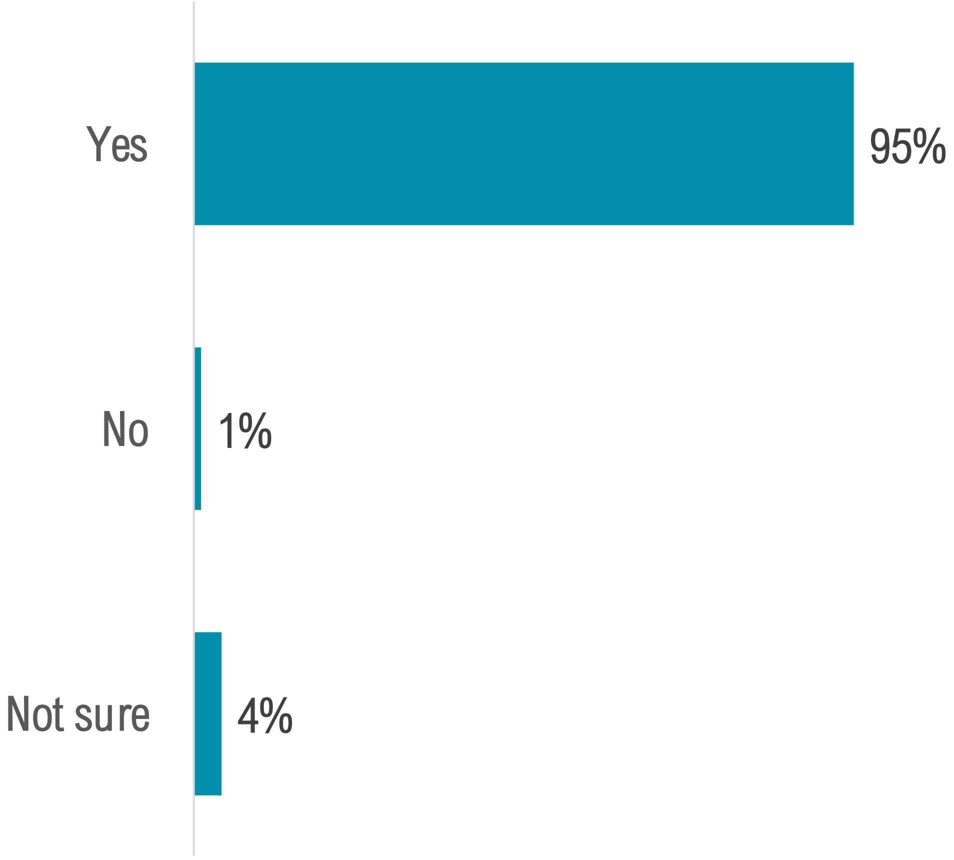
Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

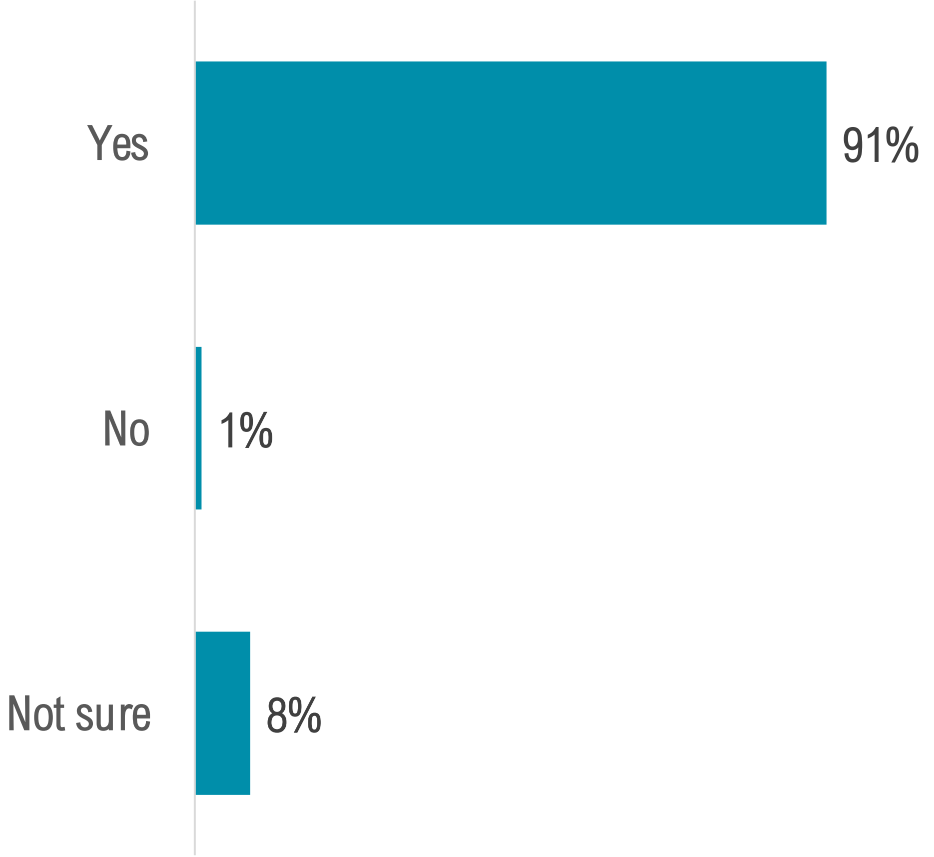
LIKELY TO RECOMMEND

Nearly all visitors are likely to recommend the Fort Myers area



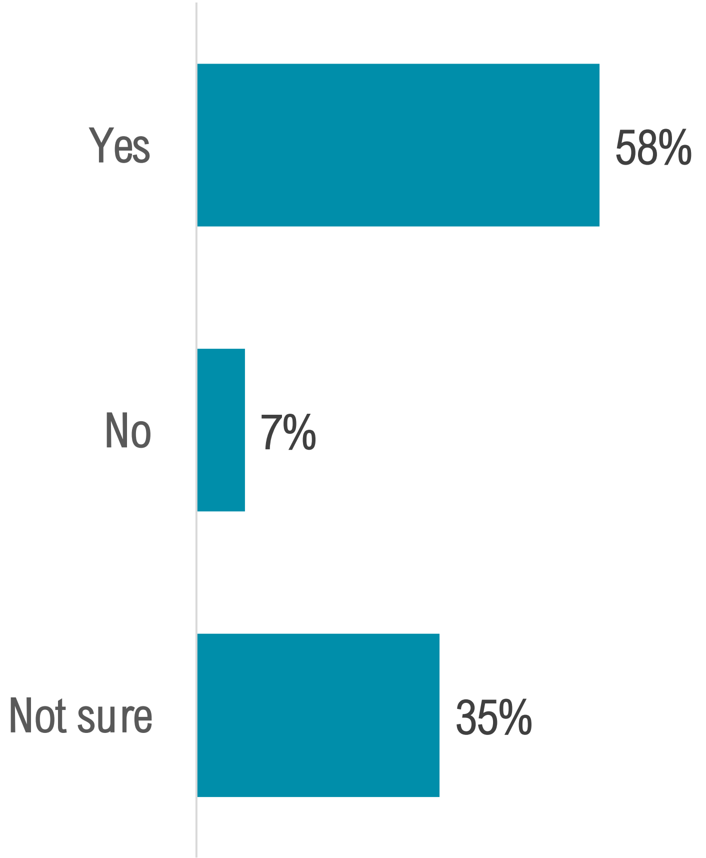
LIKELY TO RETURN

Over 9 in 10 visitors are likely to return to the Fort Myers area



LIKELY TO RETURN NEXT YEAR

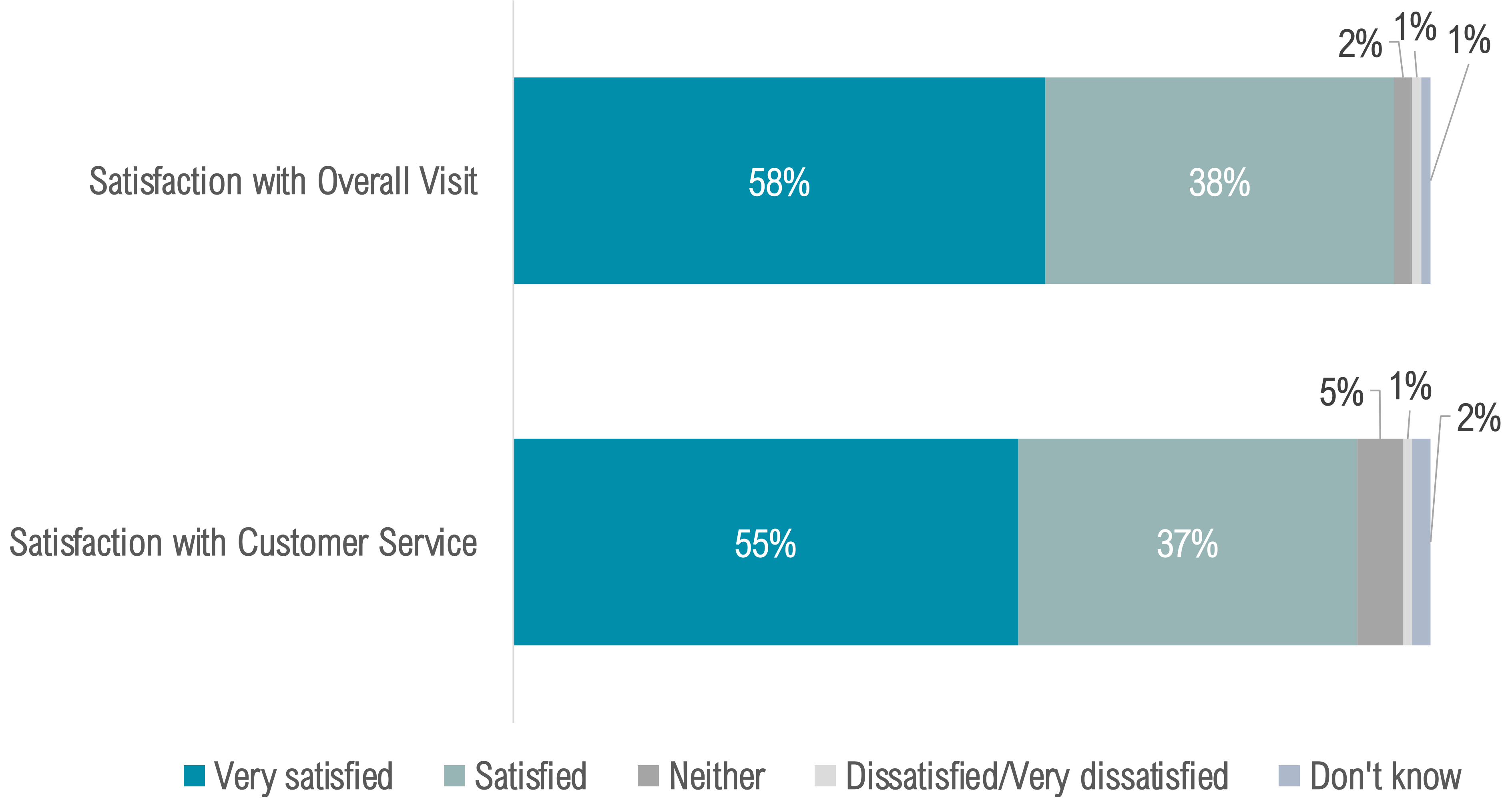
Nearly 3 in 5 visitors are likely to return to the Fort Myers area next year



SATISFACTION RATINGS

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2021	2022	2021	2022	2021	2022	2021	2022
Likely to Recommend	89%	92%	97%	96%	95%	94%	94%	95%
Likely to Return	81%	82%	96%	94%	93%	90%	81%	84%
Likely to Return Next Year	31%	37%	67%	73%	59%	61%	43%	61%

SATISFACTION



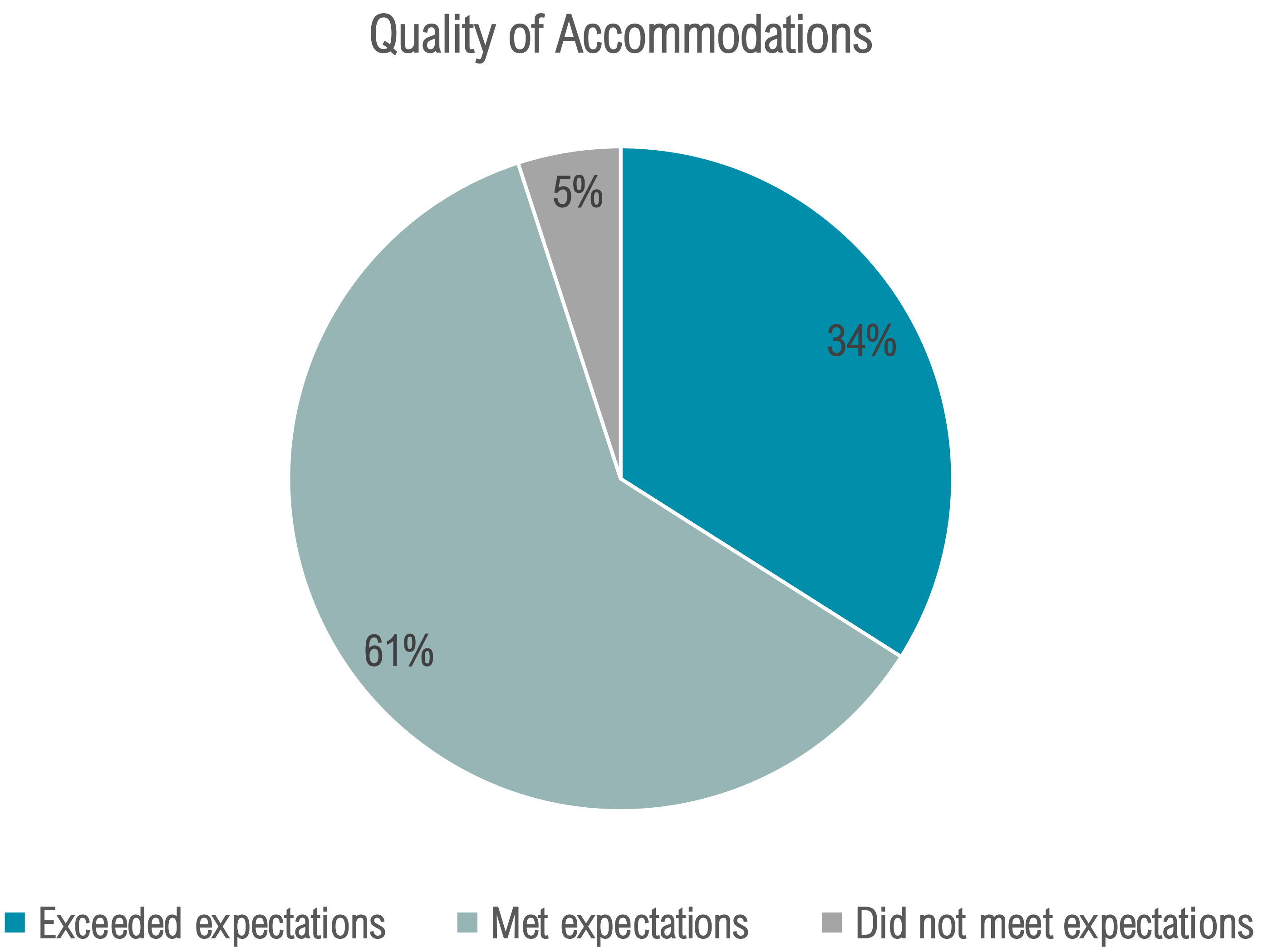
SATISFACTION RATINGS: OVERALL VISIT

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2021	2022	2021	2022	2021	2022	2021	2022
Very Satisfied	61%	45%	77%	66%	73%	58%	64%	51%
Satisfied	34%	50%	21%	31%	24%	38%	32%	45%

SATISFACTION RATINGS: CUSTOMER SERVICE

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2021	2022	2021	2022	2021	2022	2021	2022
Very Satisfied	56%	54%	67%	65%	64%	63%	55%	59%
Satisfied	35%	37%	28%	29%	30%	31%	36%	32%

SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

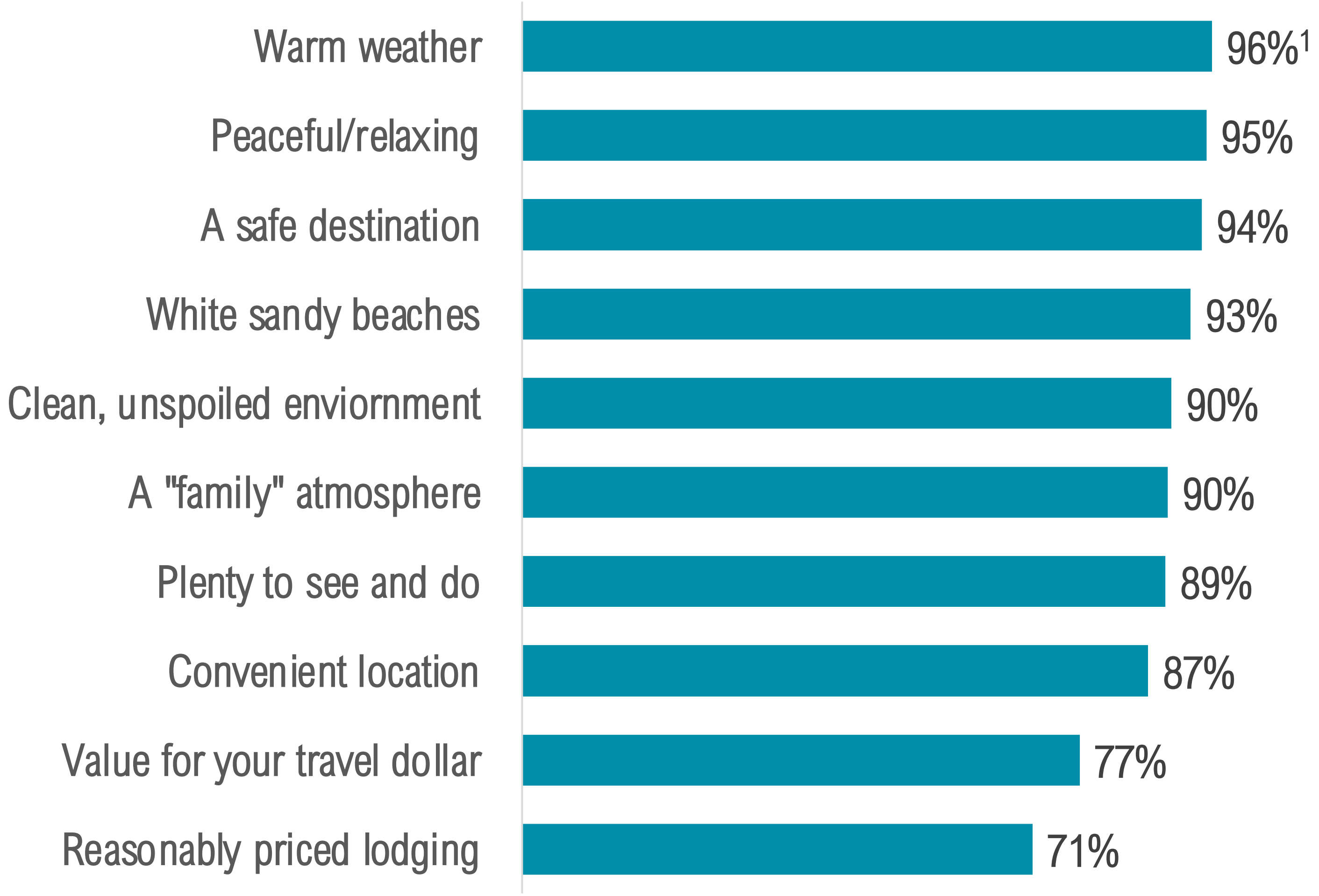


SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2021	2022	2021	2022	2021	2022	2021	2022
Exceeded Expectations	47%	43%	45%	41%	46%	41%	37%	35%
Met Expectations	50%	54%	52%	57%	51%	56%	60%	60%
Did Not Meet Expectations	4%	4%	3%	3%	3%	3%	3%	5%

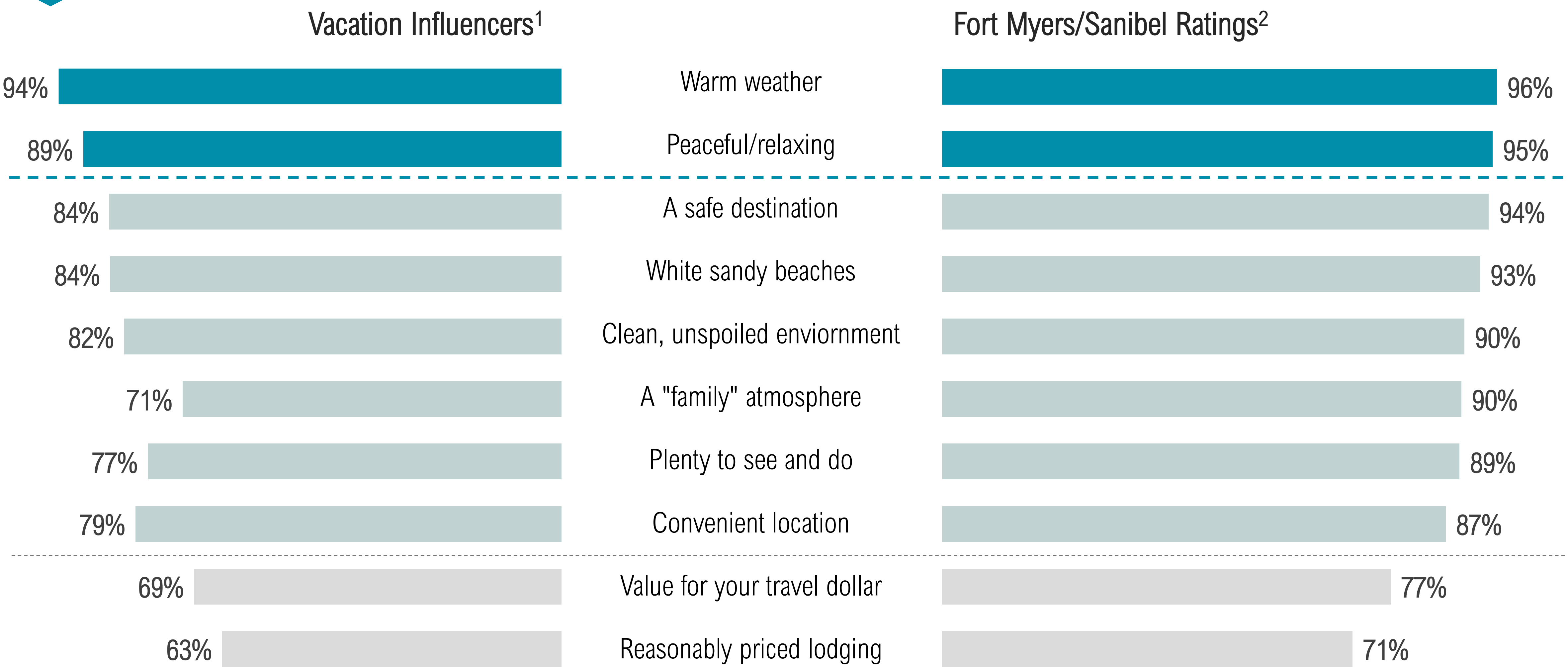
ATTRIBUTE RATINGS

Visitors gave the highest experience ratings for **warm weather**, **peace** 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.

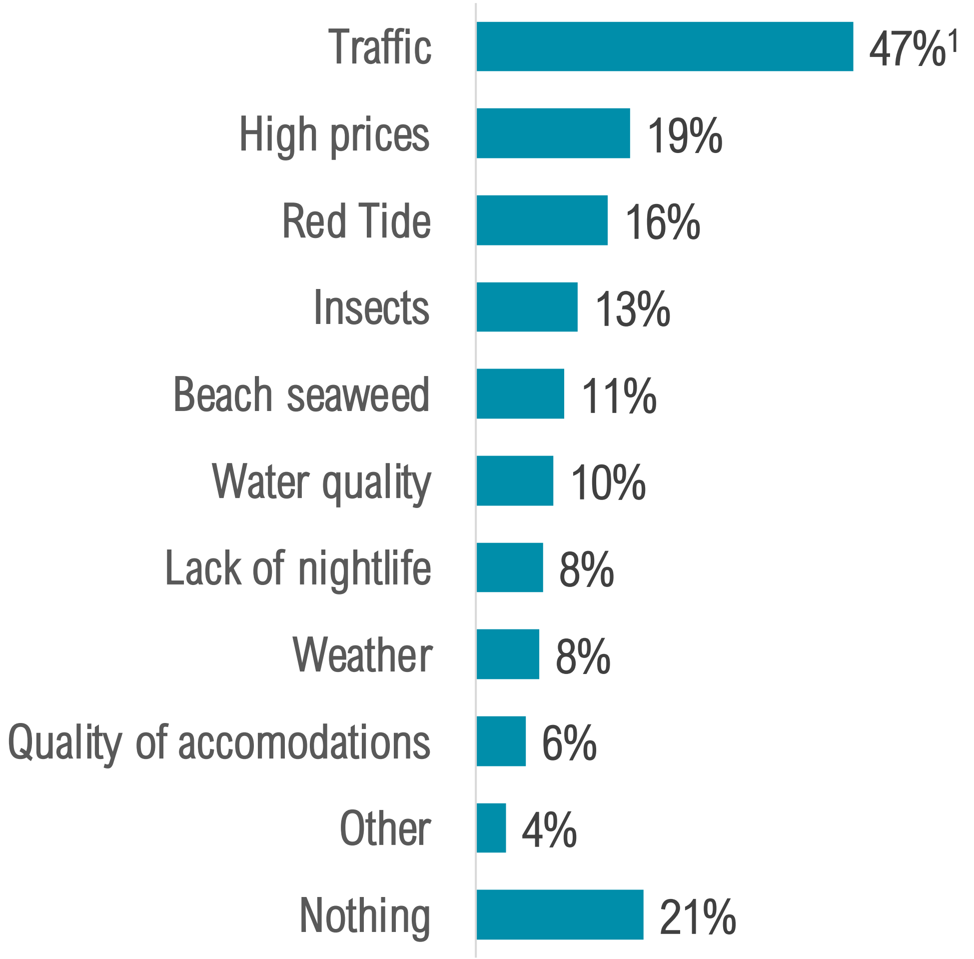
VACATION ATTRIBUTE INFLUENCE VS. RATINGS



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

VISITOR CONCERNS

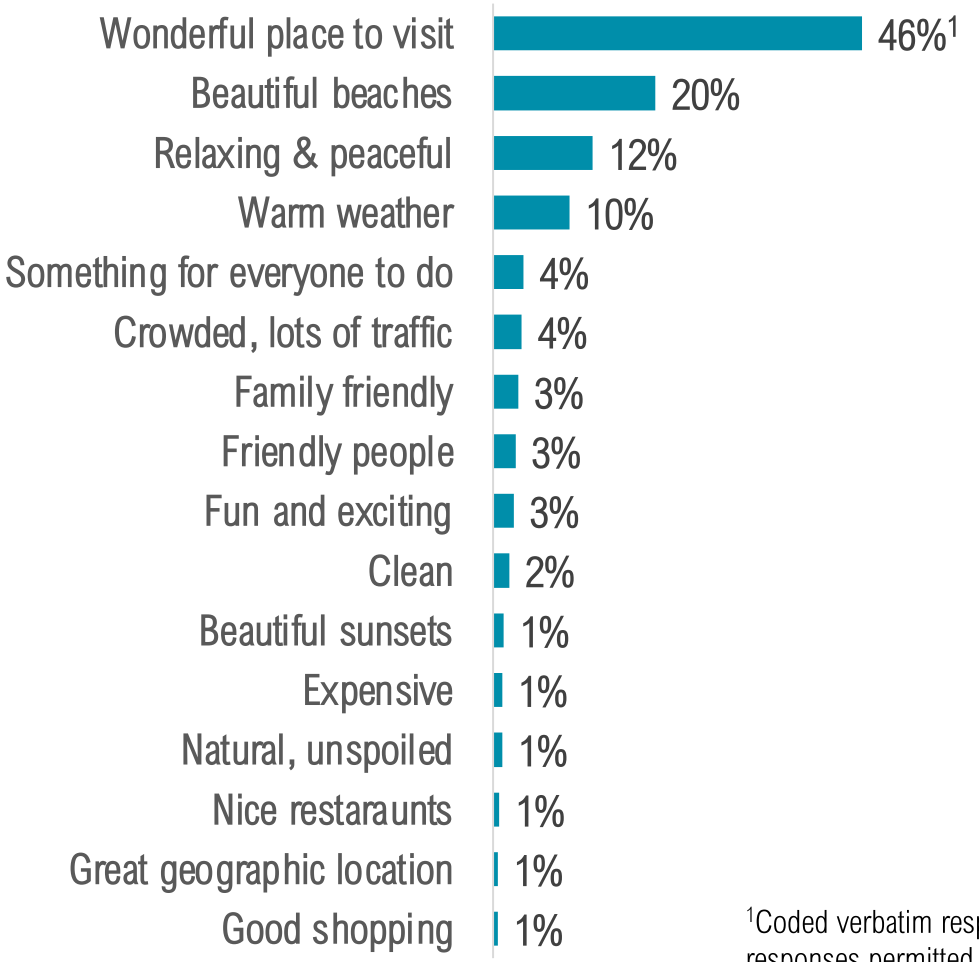
Nearly half of visitors were concerned about **traffic** during their visit.



[1]Multiple responses permitted.

AREA DESCRIPTIONS

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



[1]Coded verbatim responses; multiple responses permitted.

AREA DESCRIPTIONS

Wonderful Place to Visit

- “Great area to visit because the beach areas have so much to do. Some of the beaches are very natural. We liked the hiking there.”
- “A beautiful destination for the whole family. A place to relax and enjoy the sounds of the clear blue water and gorgeous white sand.”
- “We enjoyed our visit with our friends. Discovered so many great things here we didn't know about. The beaches are all different. Great shopping.”

Beautiful Beaches

- “Well protected nature preserve - beautiful beaches loaded with shells. Family friendly, relaxing.”
- “This area is very nice. We love the beaches and restaurants on the beach. Sunsets are awesome too.”
- “The beaches are perfect. Soft and clean. We enjoyed trying the different beaches and finding shells.”

AREA DESCRIPTIONS

Relaxing and Peaceful

- “We love that the beaches here are not full of city life. Just beaches. So relaxing.”
- “Peaceful. Environmentally friendly, bike friendly.”
- “I would describe it as a good place to go for a relaxing trip if you're looking for a calm place to get out and go on a trip to reset from a chaotic lifestyle. I would recommend bringing friends and soaking in the fun restaurants and beaches.”

Warm Weather

- “Warm weather, great beaches, different 'vibe' depending on where you stay (Sanibel. vs. FM Beach), great walking/hiking/biking, good shopping, lots of entertainment available in restaurants, hotels, OK restaurants. The main downside is the terrible traffic.”
- “The area is very nice for a winter getaway. We like that the beaches are all very unique.”
- “We have had an amazing experience here. The weather is wonderful. The local people are very friendly and helpful to find things to do.”

OCCUPANCY BAROMETER: APRIL – JUNE RESERVATIONS

Apr – June Reservations	Apr – June 2021	Apr – June 2022
Up	63%	43%
Same	24%	42%
Down	12%	12%
Not Sure	1%	3%

OCCUPANCY BAROMETER: APRIL – JUNE RESERVATIONS

July – Sept Reservations	July – Sept 2021	July – Sept 2022
Up	44%	41%
Same	36%	43%
Down	17%	14%
Not Sure	3%	2%

Year-Over-Year Comparisons

ECONOMIC IMPACT

Visitor & Lodging Statistics	Jan – Mar 2020	Jan – Mar 2021	Jan – Mar 2022	% Change
Visitors	1,091,300	913,800	1,126,500	+23.3%
Room Nights	1,599,300	1,554,500	1,985,900	+27.8%
Direct Expenditures	$1,082,785,200	$1,006,613,000	$1,410,763,600	+40.1%
Total Economic Impact	$1,758,443,200	$1,604,541,100	$2,247,346,400	+40.1%
Occupancy	78.2%	78.8%	90.0%	+14.3%
ADR	$196.19	$181.23	$235.29	+29.8%
RevPAR	$153.42	$142.81	$211.84	+48.3%

Note: The year-over-year increase in visitors is greater than the year-over-year increase in occupancy due to an increase in available units and a larger travel party size. The year-over-year increase in expenditures is greater than the year-over-year increase in ADR due to the overall increase in visitation and higher spending in all categories (restaurants, groceries, entertainment, attractions, transportation, and other expenses) by all visitor types (visitors staying in paid accommodations, visitors staying in non-paid accommodations, and day trippers).

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM

	Jan – Mar 2020	Jan – Mar 2021	Jan – Mar 2022	% Change '21-'22
Direct Jobs	14,551	13,530	18,227	+34.7%
Total Jobs	20,350	18,571	25,138	+35.4%
Direct Wages	$326,417,300	$303,066,300	$415,573,800	+37.1%
Total Wages	$545,326,600	$497,704,900	$683,756,400	+37.4%
Direct Local Taxes	$33,024,900	$30,701,700	$43,451,500	+41.5%
Total Local Taxes	$59,435,400	$54,233,500	$74,836,700	+38.0%
Direct State Taxes	$76,986,000	$71,570,200	$100,587,400	+40.5%
Total State Taxes	$115,178,000	$105,097,400	$146,526,900	+39.4%

VISITOR TYPE

Visitor Type	Jan – Mar 2021	Jan – Mar 2022
Visitors in Paid Accommodations	69%	73%
Visitors in Non-Paid Accommodations	29%	25%
Day Trippers	2%	2%

PRE-VISIT

Planned trip in advance	Jan – Mar 2021	Jan – Mar 2022
1 week or less	5%	5%
2-4 weeks	17%	17%
1-2 months	29%	29%
3-6 months	24%	24%
6 months or more	23%	23%
Not sure	2%	2%

Considered Other Destinations	Jan – Mar 2021	Jan – Mar 2022
Yes	21%	38%
No	79%	62%

PRE-VISIT

Trip Planning Websites/Apps[1]	Jan – Mar 2021	Jan – Mar 2022
Search engines	27%	34%
Airbnb, VRBO, HomeAway, or similar website	27%	24%
Airline websites	28%	23%
Vacation rental websites	21%	18%
Hotel websites	18%	18%
Trip Advisor	17%	18%
Travel reviews, blogs, stories, etc.	11%	18%
Booking websites	18%	16%
www.visitfortmyerscom	10%	8%
Visit Florida	9%	8%
Facebook	8%	7%
Fort Myers – Islands, Beaches, and Towns social media	8%	7%
TV or radio streaming	6%	6%
Instagram	5%	5%
None/Don't visit websites	17%	17%
Other	5%	5%

[1]Multiple responses permitted.

PRE-VISIT

Information Requests[1]	Jan – Mar 2021	Jan – Mar 2022
Call hotel/motel/condo	26%	32%
Visitor guide	16%	11%
Call VCB	12%	5%
E-newsletter	11%	5%
Call local Chamber of Commerce	11%	4%
None/Did not request info	58%	58%
Other	4%	4%

[1]Multiple responses permitted.

PRE-VISIT

Recall of Lee County Promotions	Jan – Mar 2021	Jan – Mar 2022
Yes	35%	48%
No	52%	40%
Can't recall	13%	12%

Characteristics influencing visit to Lee County (top 2 boxes)	Jan – Mar 2021	Jan – Mar 2022
Warm weather	95%	94%
Peaceful/relaxing	91%	91%
A safe destination	86%	87%
White sandy beaches	86%	86%
Clean, unspoiled environment	84%	81%
Convenient location	79%	77%
Plenty to see and do	79%	79%
A "family" atmosphere	74%	74%
Value for your travel dollar	70%	70%
Reasonably priced lodging	67%	66%

PRE-VISIT

Transportation	Jan – Mar 2021	Jan – Mar 2022
Fly	74%	73%
Drive a personal vehicle	21%	23%
Drive a rental vehicle	3%	2%
Drive a RV	1%	1%
Travel by bus	0%	0%
Other	0%	1%

Airport Used	Jan – Mar 2021	Jan – Mar 2022
Southwest Florida International	76%	82%
Punta Gorda	15%	8%
Miami International	2%	2%
Ft. Lauderdale international	2%	3%
Tampa International	2%	2%
Orlando International	2%	2%
Other	1%	1%

PRE-VISIT

Reasons for Visiting	Jan – Mar 2021	Jan – Mar 2022
Vacation	46%	58%
Beach	45%	51%
Relax and unwind	43%	39%
Visiting friends or relatives	20%	19%
Nature, environment, bird watching	10%	8%
Biking, hiking, etc.	8%	6%
Fishing, etc.	8%	5%
Water sports	10%	5%
Attractions	5%	4%
Shopping	4%	4%
Golf or tennis	6%	3%
Special occasion	4%	3%
Sporting events	5%	3%
Photography	4%	2%
Special event	4%	2%
Museums, history	5%	2%
Business conference/meeting	3%	2%
Culture	4%	2%
Guided Tours	3%	2%
Diving/snorkeling	3%	1%
Volunteering	3%	1%
Other	4%	5%

TRAVEL PARTY PROFILE

Visitor Origin[1]	Jan – Mar 2021[2]	Jan – Mar 2022
Florida	21%	4%
Southeast	14%	16%
Northeast	12%	20%
Midwest	44%	47%
West	5%	5%
Canada	2%	4%
United Kingdom	0.0%	1.1%
Germany	0.5%	0.7%
Other Europe	0.5%	1.2%
Other international	1.0%	1.0%

Visitor Origin[1]	Jan – Mar 2021[2]	Jan – Mar 2022
Minneapolis-St. Paul	6%	8%
New York City	5%	6%
Detroit	4%	5%
Chicago	6%	5%
Cincinnati	2%	4%
Cleveland-Akron	4%	4%
Boston	2%	4%

[1]Based on the Visitor Tracking Study and data from Arrivalist
[2]2021 data have been updated from the previous year's report to include Arrivalist data

TRAVEL PARTY PROFILE

Travel Parties	Jan – Mar 2021	Jan – Mar 2022
Mean travel party size	3.6[1]	3.5[1]
Travel with children under age 18	35%	27%

Travel Party Composition	Jan – Mar 2021	Jan – Mar 2022
Family	41%	42%
Couple	38%	36%
Group of couples/friends	12%	12%
Single	7%	8%
In a tour group	1%	1%
With business associates	1%	1%

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

TRAVEL PARTY PROFILE

Marital Status	Jan – Mar 2021	Jan – Mar 2022
Married	77%	71%
Single	20%	27%
Other	3%	3%

Age	Jan – Mar 2021	Jan – Mar 2022
Average age	50	52

Household Income	Jan – Mar 2021	Jan – Mar 2022
Median Income	$96,900	$112,500

TRAVEL PARTY PROFILE

Race/ethnicity	Jan – Mar 2021	Jan – Mar 2022
White	80%	83%
Hispanic	5%	8%
African American	5%	3%
Asian	4%	2%
Other	6%	4%

Gender	Jan – Mar 2021	Jan – Mar 2022
Male	52%	55%
Female	48%	45%

TRIP EXPERIENCE

Length of Stay	Jan – Mar 2021	Jan – Mar 2022
Average nights in the Fort Myers area	8.9[1]	8.8[1]

First time/Repeat Visitors	Jan – Mar 2021	Jan – Mar 2022
First-time	27%	35%
Repeat	73%	65%

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

TRIP EXPERIENCE

Activities[1]	Jan – Mar 2021	Jan – Mar 2022
Beaches	71%	72%
Relax & unwind	64%	67%
Dining	52%	54%
Visiting friends/relatives	28%	38%
Shopping	35%	37%
Nature, environment, bird watching	25%	28%
Water sports	25%	28%
Biking, hiking etc.	25%	27%
Fishing	18%	21%
Bars, nightlife	15%	18%
Attractions	15%	14%
Golf or tennis	15%	12%
Photography	12%	12%
Museum, history, etc.	8%	9%
Special event	5%	8%
Guided tours	10%	7%
Culture	8%	7%
Sporting event	7%	5%
Diving/snorkeling	6%	5%
Spas	5%	4%
Special occasion	4%	4%
Business conference or meeting	3%	2%
Volunteering	3%	1%
Other	3%	3%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Attractions[1]	Jan – Mar 2021	Jan – Mar 2022
Beaches	71%	72%
Fort Myers Beach Pier	29%	41%
Sanibel Lighthouse	32%	29%
Edison & Ford Winter Estates	16%	21%
Sanibel Outlets	19%	17%
J.N. Ding Darling National Wildlife Refuge	18%	17%
Shell Factory and Nature Park	11%	15%
Coconut Point Mall	9%	14%
Bell Tower Shops	10%	13%
Periwinkle Place	15%	12%
Miromar Outlets Mall	12%	12%
Gulf Coast Town Center	10%	12%
Bailey-Matthews Shell Museum	7%	9%
Manatee Park	8%	6%
Broadway Palm Dinner Theater	2%	3%
Barbara B. Mann Performing Arts Hall	3%	2%
Other	5%	4%
None	5%	13%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Area stayed	Jan – Mar 2021	Jan – Mar 2022
Fort Myers Beach	22%	29%
Sanibel Island	28%	22%
Cape Coral	15%	16%
Fort Myers	17%	13%
Bonita Springs	5%	5%
Captiva Island	3%	4%
Estero	2%	3%
North Fort Myers	2%	2%
Along I-75	1%	1%
Lehigh Acres	1%	1%
Pine Island	1%	1%
Boca Grande/Outer Island	1%	1%
None/not staying overnight	2%	2%

POST-TRIP EVALUATION

Loyalty metrics	Jan – Mar 2021	Jan – Mar 2022
Likely to recommend	95%	95%
Likely to return	91%	91%
Likely to return next year	58%	58%

Satisfaction with Accommodations	Jan – Mar 2021	Jan – Mar 2022
Exceeded expectations	45%	34%
Met expectations	52%	61%
Did not meet expectations	3%	5%

POST-TRIP EVALUATION

Satisfaction with Visit	Jan – Mar 2021	Jan – Mar 2022
Very satisfied	73%	58%
Satisfied	23%	38%
Neither	2%	2%
Dissatisfied/Very dissatisfied	1%	1%
Don't know	1%	1%

Satisfaction with Customer Service	Jan – Mar 2021	Jan – Mar 2022
Very satisfied	69%	55%
Satisfied	25%	37%
Neither	3%	5%
Dissatisfied/Very dissatisfied	1%	1%
Don't know	2%	2%

POST-TRIP EVALUATION

Visitor Concerns[1]	Jan – Mar 2021	Jan – Mar 2022
Traffic	44%	47%
High prices	22%	19%
Red Tide	21%	16%
Insects	14%	13%
Beach seaweed	11%	11%
Water quality	11%	10%
Lack of nightlife	11%	8%
Weather	9%	8%
Quality of accommodations	8%	6%
Nothing	19%	21%
Other	4%	4%

[1]Multiple responses permitted.

Methodology

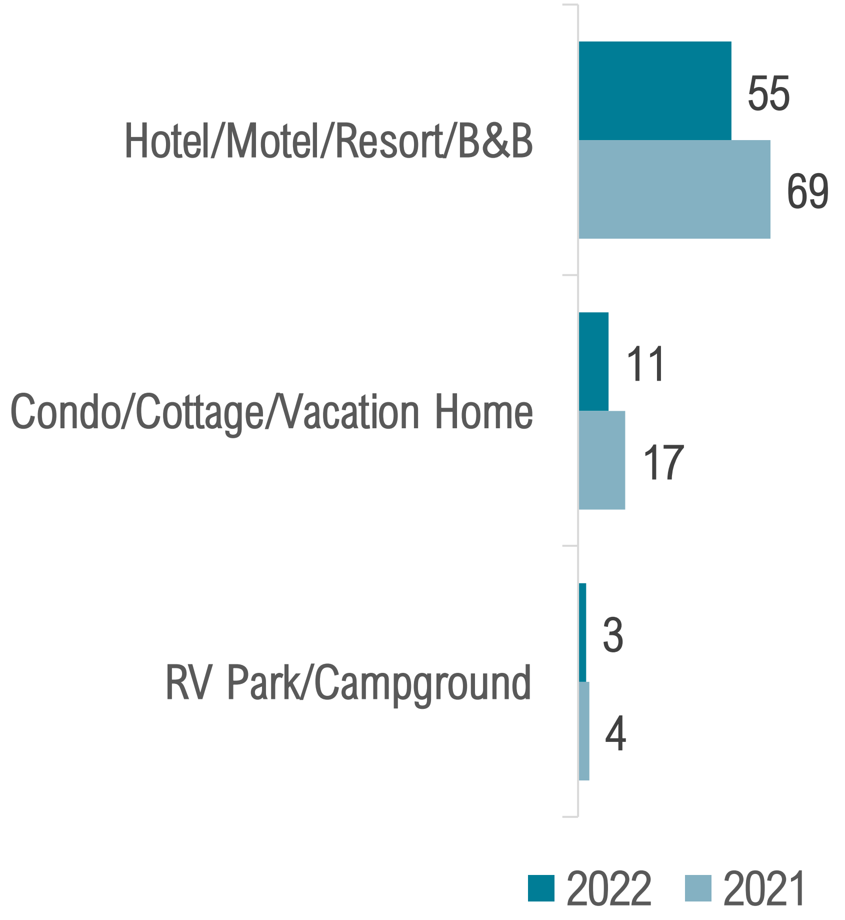
METHODOLOGY

- Visitor Profile and 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: 1,041 completed interviews
    - Target individuals: January – March visitors to Lee County
    - Data Collection: January 2022 – March 2022
  - Occupancy Study
    - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc., and the STR Report
    - Sample Size – data from 7,303 hotel/rental/campground units (69 properties) reporting to DSG, 10,269 hotel units reporting to STR (86 properties), and 15,892 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.
  - Arrivalist
  - 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 – 69 completed interviews
    - Data Collection: April 2022 (for Jan – Mar 2022)
  - Total Sample Size – data from 7,303 hotel/rental/campground units reporting to DSG, 10,269 hotel units reporting to STR (representing 86 properties), and 15,892 rental unit listings on Key Data

Number of Interviews



fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

downs & st. germain RESEARCH

METHODOLOGY

- **1,041** visitor interviews were completed in the following areas:

274	Fort Myers Beach: The Pier, Times Square
376	Fort Myers: Centennial Park, RSW
219	Sanibel: Lighthouse Beach, Sanibel Moorings Resort
131	Cape Coral/North Fort Myers: Yacht Club Community Park
41	Bonita Springs: Bonita Beach, Estero

Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

January – March 2022

Visitor Tracking & Occupancy Study

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fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

downs & st. germain RESEARCH