



# Destination Strategic Plan

Prepared for the

LEE COUNTY VISITOR & CONVENTION BUREAU

August 2022

*fort*  
**MYERS**  
ISLANDS, BEACHES  
& NEIGHBORHOODS





## ACKNOWLEDGMENTS

Clarity of Place would like to thank the numerous individuals and organizations who took time out of their schedules to provide insights and context for this plan. The list of individuals who actively contributed to the planning process—either by participating in one of the focus groups, giving of their time for an individual interview, and/or providing data and other contextual material are noted in the Appendix.

Additionally, Clarity of Place would like to thank the staff at the Lee County Visitor & Convention Bureau. Their guidance and input were integral in understanding the current state and ambitions of Lee County and the role of tourism within the County.

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# Executive Summary

**Strategic Plan Objectives:** *Provide a blueprint for the Lee County Visitor & Convention Bureau to:*

- *Lead and support efforts that leverage Lee County's visitor economy, and*
- *Contribute to county-wide efforts to provide outstanding services and amenities, a sustainable future, and excellent quality of life for all who call Lee County home.*



The Lee County Visitor & Convention Bureau (VCB) is the lead agency responsible for destination marketing and management of the County's tourism economy. The VCB represents the broader interests of the economy and residents by marketing the area to visitors and cultivating relationships among attractions, hospitality businesses, and individual communities to cultivate the area's quality of life and unique attributes. The impact of the VCB's efforts creates continual benefits for the County's residents and guests.

The VCB has created this Destination Strategic Plan (the Plan) to guide its work over the next five years to market Lee County to visitors, improve the visitor experience, and enhance and protect the County's destination assets. It provides a framework for activities needed to nurture the destination and preserve the unique balance it offers to visitors and residents—while continuing its best-in-class marketing and promotions that draw visitors to the area.

The Plan is aligned with the County's overall direction towards smart growth as set forth by the Board of Commissioners in its 2022 Strategic Planning process. In addition to looking at ways to provide positive economic impact to the County through the visitor economy, the Plan suggests a role for the VCB as a key steward in the area's placemaking efforts.

This document summarizes the Plan and provides a high-level overview of the goals, priorities, and strategic initiatives the VCB will take to support County-wide efforts to maintain and enhance the quality of life for residents. In doing so, the VCB will support the destination's long-term sustainability while taking into account the area's changing demographics and economic development needs.



## Vision

To enhance our position as the premier tourism marketing organization by working with our partners to promote one of the world's best tourism destinations.

## Mission

The Lee County Visitor & Convention Bureau serves the broader interests of the economy of Lee County by acting as an industry leader to market the entire area globally, facilitate travel to the area, and preserve and protect the area's unique attributes for the continual benefit of its residents and the travel and tourism industry.

## Plan Goals



### Overarching Goals

Three overarching goals for the destination were established to ensure the visitor economy contributes to the smart growth of the County envisioned in the Lee County 2022 Strategic Plan. Each goal is supported by a set of prioritized strategies to achieve the destination goals. The tactics for each strategy provide direction for the VCB team; each VCB department director has created an implementation plan for action using the strategies as guides. The strategies are not meant to be a static to-do list. Rather, they should be reviewed annually and as market and destination changes occur to ensure that the work of the VCB accomplishes the destination goals and supports the VCB vision and mission.

## Key Strategies

Optimize Impact	Placemaking Contributions	Destination Adaptability
Follow the targeted marketing and sales approach to celebrate the community's brand purpose and demonstrate the impact of the visitor economy to destination partners and residents	Provide recommendations on future development and preservation of the County's natural attractions to ensure that the County remains a competitive destination and maintains a high quality of life for residents	Proactively build and acquire new skills to ensure the VCB's organizational structure and resources allow the team to carry out the Plan's goals
<p><b>Key Strategies</b></p> <ol style="list-style-type: none"> <li>Maintain a dynamic, progressive, and effective marketing push to grow visitation from target audiences</li> <li>Establish visiting friends and relatives (VFR) as a new primary target market</li> <li>Work with non-traditional destination partners to generate economic activity through visitor activity</li> <li>Support initiatives that strengthen the hospitality sector</li> </ol>	<p><b>Key Strategies</b></p> <ol style="list-style-type: none"> <li>Articulate a placemaking roadmap for internal use within the County</li> <li>Support placemaking efforts within the County that affect the visitor economy and contribute to quality of place</li> <li>Have a voice and make recommendations regarding future development and conservation of the County's natural attractions to ensure the destination remains competitive in attracting guests and maintains a high quality of place for residents</li> </ol>	<p><b>Key Strategies</b></p> <ol style="list-style-type: none"> <li>Realign internal structure to deliver the objectives of the Plan and provide ongoing professional development opportunities to attract and retain staff</li> <li>Develop a communications strategy/plan that speaks directly to the value of tourism for the local community and identifies areas for greater destination partner involvement</li> </ol>

## Methodology to Craft the Destination Strategic Plan

- Assessments and data insights
- Understanding the destination in the context of the Lee County economy
- Applying industry expertise and stakeholder goals to build a strategy for destination management

## Methodology

The recommendations set forth in the Plan considered the area's destination assets; the brand values and available experiences; current travel trends and behavior, and strengths of competitor destinations. These assessments were documented in an Environmental Scan that was shared with the VCB in December 2021 and which is included in the Appendix.

The scan and a SWOT analysis were the basis for crafting the Plan's goals, recommended high-level strategies, and tactics.

## Resources



### PERFORMANCE DATA

Data and research from the VCB—including annual reports and commissioned research—and independent assessment of the data sets



### COMP SET DATA

Industry available data from a comparative set of destination organizations to compare Lee County to like destinations



### BRAND ARCHITECTURE

Branding research compiled by MMGY to understand the emotionally compelling, unique selling proposition of Lee County as a destination



### INDUSTRY STANDARDS

Assessment of the VCB's program using the same criteria Destinations International employs to accredit destination organizations



### DESTINATION PRODUCT

Competitive examination and assessment of the current and planned product mix across Lee County



### STAKEHOLDER INPUT

Real-time discussions with key stakeholders who lead or benefit from the County's tourism promotion efforts

# Destination Differentiators

Tourism has long been recognized as an important driver of the County's economic development. The tourism industry generates revenue and jobs for the area's economy and contributes to the County's vibrancy.

Due in large part to the efforts of the VCB, Lee County is known for its pristine beaches, family- and visitor-friendly atmosphere, and strong hospitality infrastructure. Given its enviable quality of place, the County and



surrounding areas have witnessed continued population growth while also maintaining a healthy first-time and repeat visitor base. The area's climate, access to amenities, and affordability have made it a top choice for second homes.

## Maintaining Competitiveness

Despite its strong destination product, Lee County must compete with other similar destinations to attract visitors. Constant effort is required to establish and maintain the destination's appeal for visitors.

The goals and strategies of the Plan take into account where the destination stands among these comparative areas and how the area can continue to differentiate itself for leisure travel, meetings, group travel, and amateur sports events.\*

Understanding the areas of differentiation for each target market—as well as the destination's overall competitiveness—will allow the VCB to continue to generate economic activity for the County while also balancing the needs of growing the visitor economy and ensuring the long-term vibrancy of the community.

## Differentiators

One of the major thrusts of the recently conducted branding effort for Lee County as a destination was to distill the elements, emotions, and appeal of the area for guests. Lee County stands out among other similar destinations thanks to the change of pace it offers; its natural environment; and the built, man-made attractions that inspire guests to pursue their passions. Additionally, Lee County is known for its stellar visitor-services and reputation as a destination that places customers and visitors first.

Coupled with these attractions and emotional draws, the area offers a variety of amenities that form a hospitality infrastructure which enhances the visitor stay and experience.

In addition to its world-renowned beaches, the County has several neighborhoods within and among its municipalities. Each municipality and neighborhood offers a different set of amenities and visitor-facing attractions.

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\* The VCB collaborates closely with Lee County Sports Development to attract and service the sports tourism market.



## Destination Vulnerabilities

The VCB has a solid strategy for marketing the destination to highlight its differentiators and excels in leveraging its venues, facilities and attractions to draw travelers. Past performance demonstrates what the impacts of VCB's actions are on increasing visitation and visitor spending.

However, many issues have the potential to impact travel and tourism in Lee County and the visitor economy's ability to continue to contribute to the area's long-term vision.

- **Environmental Sustainability**

Because Lee County's predominant demand drivers are its beaches and natural recreation assets, ensuring that the visitor economy takes into account and helps to support the County's conservation efforts is key.

Building on the County's efforts within its Strategic Plan to enhance Parks & Recreation amenities and access to Conservation 20/20 Preserves, the Destination Strategic Plan provides ways for the VCB to be a voice in efforts to preserve the County's environment, in addition to ongoing investments in beach replenishment.

- **Support for Hospitality Workforce**

Even prior to the pandemic, the future stability of the hospitality workforce was a concern—not only in Lee County, but nationally. The large share of the hospitality-related businesses in the County's economic base reinforces the national trends. In addition to not having the quantity of workers to serve the industry's needs, the high level of customer service that visitors are accustomed to makes it challenging for the destination to uphold the quality of its hospitality workforce, as well.

- **Showing the Value of the Visitor Economy to Residents**

While the pandemic and closures were reminders to residents of the impact of the tourism industry and the many amenities that they enjoy because of it, the heightened and seemingly constant influx of travelers after restrictions were lifted has shone a spotlight on the negative impacts of peak-season travel to residents.

The VCB must remind the community that its promotional efforts are targeted at shoulder and off-season visitation and continue to educate the community on

## Key Terms

### Destination Product

The sum of the natural or man-made assets, attractions and visitor services a community offers visitors. Residents also benefit from it.

### Demand Driver

The assets and attractions that provide the actual trip purpose. Not all demand drivers are focused on leisure travel; events, business travel, personal business, and education are also demand drivers.

### Hospitality Infrastructure

A natural or man-made facility or location that provides activity for people visiting an area. Examples include hotels, retail, restaurants, airports, etc.

### Destination Partners

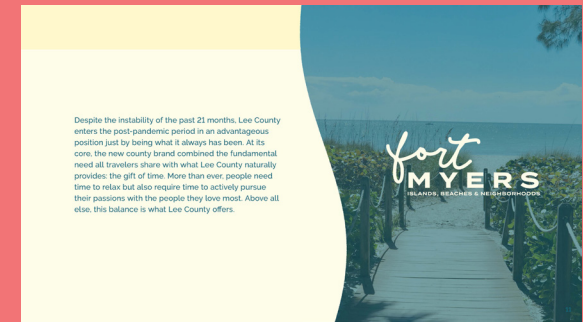
Businesses and venues that serve visitor needs. These include hoteliers and lodging providers, retail, dining and culinary assets, demand drivers, venues, attractions, and/or other organizations that promote the County.

how tourism “works” to positively impact the local economy and provide benefits to residents.

## Refreshed Brand

The VCB recently concluded a branding process to refresh messaging around what distinguishes Lee County as a destination.

The process studied traveler and resident social sentiment and identified the brand values, purpose, and experiences that make Lee County unique.



BRAND VALUES	BRAND PURPOSE	BRAND EXPERIENCE	BRAND VOICE
<p>Active</p> <p>Connecting</p> <p>Inspiring</p> <p>Fresh</p> <p>Fun</p>	<p>We are a change of pace from the regular world.</p> <p>We create an environment that inspires you to take time to pursue your passions and make the most of every moment.</p>	<p>This is our time.</p> <p>~</p> <p><i>Always at our own speed.</i></p> <p>~</p> <p>Connected to the water.</p> <p>~</p> <p><i>More Time, more living.</i></p>	<p>Comfortable</p> <p>Confident</p> <p>Refreshing</p> <p>Empowering</p> <p>Passionate</p>

# Stakeholder Feedback

Stakeholders provide the backbone of a destination's marketplace, as well as the support—both financial and tactical—to accomplish the VCB's goals.

To understand stakeholder needs and to ensure that the VCB will have the buy-in from its destination partners to implement the Plan, 32 interviews, 10 focus groups, and several follow-up conversations were held. In addition to gaining input on stakeholder concerns and validating or refuting findings from the assessments, the conversations uncovered potential programs to enhance the value the VCB brings to its stakeholders.

## Summary Themes

The following themes emerged from the sessions.

- **Conservation & Growth**

Stakeholders recognize that natural resources drive leisure demand and leisure demand drives economic activity in the County, as well as spurring population gains and more growth. Conservation of open space; water quantity and quality; and wildlife habitats are fundamental to the region's quality of life. As with other destinations that

rely on their natural resources to drive visitation, the VCB must encourage and support efforts to balance conservation of the natural environment and the needs of a growing population. The sentiments reflected those raised in the Lee County "Planning for One Million" conversations.

- **Brand Beyond the Beaches**

Stakeholders know that the area's beaches are iconic and one of the main demand drivers. However, they also recognize that there are other attractions for which the destination should be known. Stakeholders affirmed the destination's reputation for ease of travel and unparalleled visitor services.

- **Placemaking & Connecting the County**

As the County continues to grow, there is an opportunity for public- and private-sector developers to create more inclusive and engaging places that serve both residents and visitors.

Stakeholders recognize that there are concentrations of visitor amenities, hospitality infrastructure, and other visitor-facing activities throughout the

region. However, the stakeholders also recognize that these assets are not easily connected.

Stakeholders believe that the VCB should leverage and encourage the development of more inclusive and engaging places throughout the County; should market those experiences to visitors; and should show visitors easy ways to access the different neighborhoods in the County during their stays.

- **Hospitality Workforce Concerns**

Workforce is a challenge that currently dominates the industry. Addressing the issue will require a long-term strategy.

Stakeholders believe that the VCB should support efforts to fill the workforce gaps in the short-term, as well as be involved in discussions to ensure there is an ample hospitality workforce in the longer-term that can continue to provide high-quality service to the area's visitors.

# Why Placemaking and Destination Management Matter

The goal of tourism marketing programs is to raise visibility of the destination and create interest among potential guests to travel to the destination. Destinations are the sum of their parts—and each has a mix of attractions, venues, characteristics, and other intangibles that set them apart. Destination organizations rely on the collection of attractions, attributes, and the brand of the place to make the case for a visit.

Marketing of destinations and encouraging visits create what the U.S. Travel Association has described as a “virtuous cycle of economic benefits.” By promoting a destination, the destination organization generates awareness which leads to attracting more visitors. The visitors spend money at hotels and resorts, as well as at the destination’s attractions, restaurants, and stores. That activity supports jobs and generates tax revenue that can be re-invested into the community that the destination organization serves.

## The VCB’s Dual Role

The VCB is the catalyst for the virtuous cycle of visitor economy benefits in Lee County. With increasing competition in the visitor market, the VCB’s marketing and sales programs work to gain a “share of voice” among each of the target visitor audiences. The VCB represents the entire destination with efforts at a scale that create efficiencies and maximize marketing and advertising impact. The larger scale of collaborative destination marketing that the VCB is able to attain is more effective than what individual destination partners could accomplish alone.

Ensuring that the destination remains competitive is a more complex endeavor than merely marketing a group of attractions or assets. It requires stewarding the destinations assets—which serve both residents and visitors—for the long-term.

***Destination Placemaking:*** Providing added passive and active attributes and assets that enhance the sense of place, attractiveness, and appeal of an area to both residents and visitors.

## Promoting Beyond Tourists

While increased visitation and visitor spending are the most visible impacts of the VCB’s efforts, the VCB’s work also creates positive attention for the County’s other economic development efforts.

For well-established destinations like Lee County whose tourism industry is deeply intertwined as a significant part of the local economy, the campaigns and brand management are able to gain attention for Lee County as a great place to live, work, buy a second home, retire, start a business, start a career, or go to college.

Marketing those nuances and reaching those high-value visitors—of all types—requires continual and consistent investment to remain relevant amid fierce competition.

# Strategic Opportunities

After assessing the destination, the visitor industry's alignment with the Lee County 2021 Strategic Plan goals, an internal VCB SWOT, and the input received from stakeholders, the following key strategic opportunities for the VCB were identified.



## Leveraging Hospitality Infrastructure

The continued growth of the area (in terms of population and the amenities that have built up to serve residents) is an opportunity for the VCB and its tourism promotion efforts.

The VCB can better market the inland communities' hospitality infrastructure and disperse visitors throughout the County. To ensure better accessibility between the infrastructure and beaches, the VCB will need to lend a voice to efforts at improving transportation corridors and travel options within the County.

Additionally, the VCB can leverage the large percentage of visiting friends and relatives to the area as a way to connect to residents. By sharing information about the hospitality infrastructure and visitor experiences to be enjoyed in the County, the VCB will provide tangible value to the area residents.



## Activating the Brand

The new brand architecture positions Lee County to differentiate itself among potential visitors, as well as anyone looking at the area for potential travel, work, or investment opportunities.

In addition to carrying out the current fiscal year marketing and sales strategies, the VCB should continue to socialize the new brand to ensure destination partners and other placemaking entities understand and appreciate the destination's brand promise and align their external messaging as appropriate.

Working with community partners to portray the County with a unified voice will serve the purpose of consistent messaging to external audiences and will build community pride within the destination.



## Managing the Destination

The VCB is an integral part of placemaking and should provide a voice, rationale, and validation for quality of place investments or initiatives that protect the long-term sustainability of the area for residents and guests, alike. Going forward, the VCB has the opportunity to be even more intentional and proactive in such efforts to round out its responsibility to "manage," as well as "market" the destination.

By shifting the VCB's mindset from primarily tourism promotion to a balance with more active and visible destination management, the VCB can continue to leverage the demand drivers in the area to stimulate greater visitor spending and business activity throughout the County.

## Foundations Upon Which to Leverage Opportunity



To enhance our position as the premier tourism marketing organization by working with our partners to promote one of the world's best tourism destinations.

The Lee County Visitor & Convention Bureau serves the broader interests of the economy of Lee County by acting as an industry leader to market the entire area globally, facilitate travel to the area, and preserve and protect the area's unique attributes for the continual benefit of its residents and the travel and tourism industry.

We are a change of pace from the regular world. We create an environment that inspires you to take time to pursue your passions and make the most of every moment.

- Optimize positive impacts of the visitor economy
- Support placemaking initiatives that enhance Lee County and ensure long-term destination sustainability
- Position the destination to be adaptable

Main initiatives the VCB will undertake

Specific steps/actions to carry out the initiative



# Strategic Framework

The VCB has excelled and continues to excel in its primary role of telling the County's story to increase destination awareness and encourage visits to and visitor spending in the area. The VCB's continued success and ability to have a lasting impact on the County's economic vitality and long-term sustainability depends on ensuring residents appreciate the impacts of the visitor economy and providing a more proactive voice to the County's long-term placemaking needs.

## DESIRED OUTCOMES

The overarching goals for the Lee County VCB to continue to serve the broader social and economic interests of the County by marketing and managing the destination for the continual benefit of residents, visitors, and the travel and tourism industry are:

- Drive higher levels of shoulder and off-season visitation and visitor spending to the area
- Support placemaking initiatives that enhance Lee County and continue destination product development efforts
- Position the destination to be adaptable

## STRATEGIES

Prioritized, high-level initiatives to achieve the goal and the VCB's role therein

## TACTICS

Actions and steps for the VCB team to implement the strategies

## LEE COUNTY VCB ROLE

### LEAD

Strategies for which the VCB will be the main actor and for which the organization will be held accountable

### PARTNER

Strategies for which the VCB will take an active role to ensure the strategy's success.

### PROPONENT

Community needs around which the VCB will rally support and provide the case for the impact it will have on the destination

# 01 OPTIMIZATION OF VISITOR ECONOMY IMPACTS

## WHY

Attracting visitors to a destination is a dramatically competitive industry. Travelers—especially leisure travelers—have a tremendously wide variety of options of where to go and how to spend their money. By continuing to be intentional and targeted in its promotional efforts, the VCB will be able to attain its mission of building Lee County’s reputation as one of the most naturally beautiful and sought-after tourism destinations in the world.

## OUTCOME

By following the targeted marketing and sales approach to celebrate the community's brand promise to external and internal markets, the VCB will demonstrate the impact of the visitor economy in more direct ways to destination partners and residents and, in doing so, invite them to help extend the area's brand to all types of visitors.

### TARGETED MARKETING AND SALES

Maintain dynamic, progressive, and effective marketing to grow shoulder and off-season visitation from target audiences

- 1. Continue to invest in and develop target markets in accordance with the adopted annual marketing and sales plan **L**
- 2. Strengthen outreach to grow travel trade, group planner, and media relationships through continued travel trade, meeting, media relations, and sales **L**

### VISITING FRIENDS & RELATIVES

Establish visiting friends and relatives (VFR) as a new primary target market

- 1. Use creative content, social media, and visitor services platforms to intentionally encourage local ambassadors and VFR invitations **L**
- 2. Develop and distribute tools to encourage exploration of different parts of the destination **L**



L = LEAD

PT = PARTNER

PP = PROPONENT

**■** Ongoing

**■** Medium-term

**■** Short-term

**■** Long-term





### LEVERAGE MARKET DEMAND DRIVERS

Work with non-traditional destination partners to generate economic activity through visitor activity

1. Connect with corporate and higher-education business transient demand drivers and find ways to support and encourage their travelers **PT**
2. Provide resources to the sports development and economic development departments to share messaging, visuals, and other collateral with their visiting audiences to enhance their visitors' experiences **PT**
3. Connect with local corporate leaders and educational institutions to identify potential meetings/conferences that could be held in Lee County **PT**

### STRENGTHEN HOSPITALITY SECTOR

Support initiatives that strengthen the hospitality sector

1. Provide support to local partners to advance the tourism workforce (e.g., market existing training programs to destination partners to extend their reach and provide added support given changes in travel behavior due to the pandemic) **PT**

L = LEAD

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■ Ongoing

■ Medium-term

■ Short-term

■ Long-term

## 02 THOUGHT LEADERSHIP IN PLACEMAKING

### WHY

Lee County's destination assets are the product the VCB "sells" to potential visitors. Given the VCB's role as the lead agency for marketing the destination and its understanding of long-term travel trends, it knows what attracts guests to the area and what future guests will want for a superb experience in Lee County. The VCB should lend its voice to community-wide conversations about needed ancillary products or hospitality infrastructure to ensure the highest and best use of existing venues and facilities and that the community works together to sustain the area's natural attractions and resources.

### OUTCOME

By having a voice and making recommendations regarding future development (built attractions) and conservation of the County's natural attractions, the VCB will ensure that the County nurtures and strengthens its competitiveness as a travel destination and maintains a high quality of life for residents.

#### PLACEMAKING ROADMAP

Articulate a placemaking roadmap for internal use within the County

1. Identify opportunities to leverage natural/outdoor recreation areas for visitor use **L**
2. Work with other County departments and municipalities to provide support for Lee County's Strategic Planning efforts to maintain and nurture water-based natural areas and recreational resources **PT**
3. Provide input on the budgetary implications of building out the placemaking roadmap **PT**

#### THOUGHT LEADERSHIP

Support placemaking efforts within the County that affect the visitor economy and contribute to quality of place

1. Provide a prioritized list of tourist tax funded capital projects and private market development opportunities that would complement the area's destination product and ensure long-term competitiveness. **PT**
2. Encourage redevelopment opportunities that expand the area's capacity to host groups and events **PP**

#### CHAMPION THE VALUE OF TOURISM

Continue conversations with key stakeholders to champion the value of tourism and show how the VCB's efforts contribute to placemaking

1. Set meetings with each municipality to introduce how the brand elements apply to their city/town and how the priorities of the Plan give the VCB a vehicle to promote the area's unique selling proposition to visitors and residents **PT**

L = LEAD   PT = PARTNER   PP = PROPONENT

Ongoing     
  Medium-term  
 Short-term     
  Long-term

### 03 DESTINATION ADAPTABILITY

**WHY**

As the VCB becomes more intentional in carrying out the objective of “destination management,” it will need to realign its team’s focus, priorities, and roles. Different skills will be needed to serve as a thought leader in placemaking and supporting those efforts.

**OUTCOME**

By being proactive to build and acquire new skills, the VCB will ensure that it has the resources, support, and prioritization to successfully carry out the Plan’s goals.



#### INTERNAL STRUCTURE

Realign internal structure to deliver the objectives of the Destination Strategic Plan

1. Clarify the role of the VCB mission and ensure its organizational structure supports destination management **L**
2. Expand the research program so the VCB’s Customer Relationship Management (CRM) system and other data/ research can be easily used to share tourism market insights with destination partners **L**
3. Develop Key Performance Indicators (KPI) to measure progress in managing the destination over time (in addition to annual KPIs for tracking success in promoting the destination) **L**
4. Obtain Destination Marketing Accreditation Program (DMAP) re-accreditation **L**
5. Provide ongoing professional development to attract and retain VCB staff **L**

#### DEVELOP A COMMUNICATIONS PLAN

Develop a communications strategy/plan that speaks directly to the value of tourism for the local community and areas for greater destination partner involvement

1. Expand the existing communications plan to apprise stakeholders and funders of top priorities going forward, what the VCB hopes to accomplish (destination impact), and how the VCB will individually engage and measure success **L**

L = LEAD	PT = PARTNER	PP = PROPONENT
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<span style="display: inline-block; width: 15px; height: 15px; background-color: #c00; margin-right: 5px;"></span> Short-term	<span style="display: inline-block; width: 15px; height: 15px; background-color: #008000; margin-right: 5px;"></span> Long-term	

# Next Steps

The visitor economy has and will be a critical element of the vibrancy of Lee County. Through the work of the VCB, Lee County is known globally as a family-friendly destination, with superior visitor services and a host of assets beyond the beaches, including attractions for outdoor recreation enthusiasts and sports tourists. The VCB has excelled in telling the story of the area's brand purpose and value and looks to play a more active role in the management of the destination.

The recommendations of this Destination Strategic Plan build on the VCB's solid foundation of marketing, programming, and visitor services to map a course for engaging more actively and intentionally in the County's placemaking efforts. By lending its voice and expertise in what is needed for the County to remain a sought after destination for visitors, the VCB will contribute to the County's efforts to create a safe, healthy, and vibrant community that provides a high quality of life for residents and visitors alike.

Through the Plan, the VCB will continue to apply the organization's expertise and relationships with destination partners to drive shoulder and off-season visitation. The VCB will also work to help find a balance between creating economic activity through the visitor economy and the vision and goals for long-term stewardship of the County's natural attractions and destination assets.

The Plan was built under the assumption that the VCB will take the lead on several of the recommended strategies. Other efforts will require involvement and action by destination partners, the municipalities, and other placemaking entities in the County.



# Appendix

1. Participating Stakeholders
2. Environmental Scan



## PARTICIPATING STAKEHOLDERS

Jan Ackley-Malecha, Intermezzo Choir/Fort Myers Symphonic Mastersingers	LeAnn Bruzewski, Hampton Inn Fort Myers Beach/Sanibel Gateway	Lois Croft, Florida Restaurant & Lodging Association
Jenna Adams, Luminary Hotel & Co.	Erin Burdette, Sea Gypsy Vacation Rentals	Chris Davison, Island Inn Company
Tom Albrecht, Fairfield Inn & Suites by Marriott Bonita Springs	Pam Cronin, The Shell Factory and Nature Park	Colleen DePasquale, Greater Fort Myers Chamber
Jisel Alonso, Fort Myers Beach Chamber of Commerce	Mike Cannington, FastTrax & HeadPinz Entertainment Centers	Roger Desjarlais, County Manager
Mayor Kevin Anderson, City of Fort Myers	Joel Caouette, City of Sanibel	Megan Dunphy, Luminary Hotel & Co.
Tom Anderson, Courtyard by Marriott Fort Myers Cape Coral	Edward Caracappa, Wild About Popcorn	Tiffany Esposito, SWFL Inc.
Kevin Berry, ADA Consulting of SWFL	Tommy Cassel, Lee County Sports Development	Ani Farrell, Holiday Inn Fort Myers Airport at Town Center
Heather Bettner, Gulf Coast Symphony	Anita Cereceda, The Islander, The Pier Peddler, Local Color Fort Myers Beach	Megan Fasig, Outrigger Beach Resort
Jennifer Blanes, ConferenceDirect	Chadd Chustz, Town of Fort Myers Beach	Mark Fisher, Lee County Port Authority - Southwest Florida International Airport
Darla Bonk, City of Fort Myers	Lee Clayton, Courtyard Fort Myers Cape Coral	Sandra Greiner, Sun Splash Family Waterpark
Nadia Bourgault, Global Communication Experts GmbH	Doris Colgate, Offshore Sailing School	Allison Gruber, Lee County Sports Organizing Committee
Steve Boutelle, Lee County Natural Resources	Kari Cordisco, Sanibel Moorings Resort	Marwan Haddad, The Westin Cape Coral Resort
Christine Brady, Lee County, Assistant County Manager	Cindy Cowart, Cowart Sports Events, Inc.	

## PARTICIPATING STAKEHOLDERS, *continued*

Jennifer Hamil, Lee County Parks & Recreation	John Lai, Sanibel and Captiva Chamber	Frank Mann, Lee County Commissioner
Brian Hamman, Lee County Commissioner	Tony Lapi, Sanibel Captiva Beach Resorts	Sharon McAllister, ArtFest Fort Myers
Mike Hammond, Lee County Parks and Recreation	Jim Larkin, Crowne Plaza Hotel	Marcia McHugh-Turner, United Way of Lee, Inc.
Dave Harner, Lee County, Deputy County Manager	Dan Lauer, Fort Myers Mighty Mussels	Jon McLain, Village of Estero
Marty Harrity, Doc Ford's Rum Bar and Grille	Samantha Leonard, Hyatt Regency Coconut Point Resort & Spa	Kevin McNamara, Cape Coral Business Alliance
Rob Hernandez, City of Cape Coral	Marty Lawing, City of Fort Myers	Susan McNamara, Cape Coral Business Alliance
Roger Hernstadt, Town of Fort Myers Beach	Robbie Lindeman, Florida High School Athletic Association	Lynnae Messina, J.N. "Ding" Darling Wildlife Society
Brian Holly, Holiday Inn Fort Myers Airport at Town Center	Barbara Linstrom, Sanibel Captiva Conservation Foundation	Jeff Mielke, Lee County Sports Development
Sarah Jacobson, Sanibel Community Association	Jacki Liszak, Fort Myers Beach Chamber	Becky Miller, Sundial Beach Resort and Spa
Deborah Jonsson, Florida Repertory Theatre	Zach Lozano, Florida Park Service	Sharon Mitchie, Cottages to Castles
Annisa Karim, Randell Research Center	Jodi Lucke, Hampton Inn Fort Myers Beach/Sanibel Gateway	Marc Mora, Lee County, Assistant County Manager
Dawn Kayatta, Fluke Corporation	Carrie Lund Cacioppo, Players Circle Performing Arts Center	Victoria Moreland, , Lee County Port Authority - Southwest Florida International Airport
Brian Kramer, Hyatt Regency Coconut Point Resort & Spa	Russ Luther, ECHO Global Farm	Stephanie Muddell, Bailey-Matthews National Shell Museum
Andrew Kurtz, Gulf Coast Symphony		

## PARTICIPATING STAKEHOLDERS, *continued*

Fran Myers, Lee County Tourist Development Council	Ray Sandelli, Lee County Commissioner	John Talmage, Lee County Economic Development
John Naylor, Classic Basketball Inc	Lisa Sbuttoni, Fort Myers River District Alliance	Misty Tidwell, Resort Harbour Properties
Ryan Orgera, Sanibel-Captiva Conservation Foundation	LaBrenda Schretter, Outrigger Beach Resort	Janel Trull, Cape Coral Museum of History
Randy Paniagua, Town of Fort Myers Beach	Glen Salyer, Lee County, Assistant County Manager	Renee Turbeville, Fort Myers Community Redevelopment Agency
Steffanie Pearce, Gulfshore Opera	Mayor Holly Smith, City of Sanibel	Ryan VanDenabeele, Salty Sam's Marina
Cecil Pendergrass, Lee County Commissioner	Benjamin Siegel, Lee County Port Authority - Southwest Florida International Airport	Pamela Vargas, Marriott Sanibel Harbour Resort & Spa
Chris Peters, Fort Myers Mighty Mussels	Ken Sneed, Ken Sneed & Associates	William Waichulis, Pink Shell Beach Resort & Spa
Fran Peters, Island Vacations of Sanibel & Captiva, Inc	Tracy Snyder, Sundial Beach Resort and Spa	Mark Weber, Minnesota Twins
Jennifer Pfenninger, Embassy Suites by Hilton Fort Myers - Estero	Elyzabeth Spires, The Westin Cape Coral Resort at Marina Village	Robert Wells, Marker 60, LLC
Honey Phillips, City of Cape Coral	Jeff Staner, Miromar Outlets	Michelle Westley, Gulfshore Opera
William Prather, Broadway Palm Dinner Theatre	Mark Starsiak, Intersport	Rhett Wilson, Hyatt Regency Coconut Point Resort & Spa
Kevin Ruane, Lee County Commissioner	Bryan Stockbridge, Gulf Coast Kayak	Pete Winton, Lee County, Chief Financial Officer/Assistant County Manager
Tracy Ryan, McKibbin Hospitality	Kristen Stuller, Estero River Outfitters	
Scott Safford, Sea Gypsy Vacation Rentals	Sanmukh Swami, Best Western Fort Myers Inn & Suites	



# Environmental Scan

Prepared for the

**Lee County VCB**

December 2021

CLARITY  
OF PLACE 

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# OVERVIEW & PURPOSE

*Identify what assets Lee County has from a visitor perspective to develop an understanding of its current and potential competitiveness and differentiation as a destination.*

To understand the current state of the Lee County destination, Clarity of Place undertook an environmental scan to inventory destination assets, understand areas where Lee County can differentiate itself, and gather staff input on a future vision and goals for the destination. The scan also helps understand the foundations in place that allow the Lee County Visitor & Convention Bureau ("Lee County VCB") to produce the impacts that it does for the County's visitor economy.

## Environmental Scan Components

- **What:** Destination assets are the "product" that Lee County has to offer to visitors. Without a compelling product, Lee County cannot differentiate itself against its competition.
- **Why:** Understanding areas where Lee County can differentiate itself will allow the Lee County Visitor and Convention Bureau ("Lee County VCB") to more effectively hone marketing efforts, while encouraging needed destination development investments.

The environmental scan sets a base for understanding the context in which Lee County will compete and grow. Unless otherwise noted, all data was current as of October 31, 2021.

This baseline also provides a starting point to consider stakeholder input and identify areas where the Lee County VCB can have the most direct impact.

## 2021 Tourism Impacts



### TOURISM DOLLARS AT WORK



**BEACH & SHORELINE**  
Allocated **\$9.1M** to county-wide projects including beach nourishment, facility maintenance and improvements.  
\*FY2021



**EVENTS & ATTRACTIONS MARKETING**  
Allocated **\$559K** to nonprofit partners to help foster the development and enhancement of visitor experiences.  
\*FY2021

Source: Lee County VCB

# LEE COUNTY DESTINATION

Known primarily as a beach destination, Lee County offers visitors a range of activities to enhance and extend their stay. The County is home to two Major League Baseball Spring Training programs (Boston Red Sox and Minnesota Twins), hosts a number of youth sporting activities, and maintains historical assets (e.g., Edison and Ford Winter Estates). Strong population growth over the past four decades has contributed to the development of the destination's hospitality infrastructure.

Lee County is 1,212 sq. miles comprising 65% land mass and 35% water resources situated in Southwest Florida along the Gulf of Mexico. In 2021, a study by SmartAsset ranked Lee County as the eighth best economy in the State of Florida. The tourism and hospitality industry contributes over \$3.7 billion in direct visitor spending to Lee County's economy. The natural appeal of the beaches and natural areas in the County are the main drivers of visitation to the Fort Myers area. The hospitality infrastructure that has evolved to serve visitors has also added to the area's quality of place and has helped to attract new residents and corporate growth to Lee County.

Lee County offers visitors entertaining downtown environments, recreational waterways, competitive sports venues, especially for baseball, and a vibrant support system of activities,

## Accessibility to Visitors

Lee County enjoys primary air service from the Southwest Florida International Airport (RSW), north/south drive access via Interstate 75, and water access via the Key West Express Ferry. The road network across the inland areas of the county is extensive, however, there are limited bridges

from the inland area to the beaches. This limits access to the beaches and islands and increases driving time and congestion between the islands and the inland areas.

## Competitive Set

Lee County competes with other beach destinations along the western Gulf Coast and the Keys of Florida. Prior to the pandemic 17% of Lee County visitors also considered Naples/Marco Island, 15% considered Miami/Fort Lauderdale, 11% considered the Keys/Key West, 9% Orlando, and 8% Tampa/St. Petersburg.

## Destination Management

As a department of the Lee County government, the Lee County VCB serves the broader interests of the county by acting as an industry leader to market the entire area globally, facilitate travel to the area, and preserve and protect the area's unique attributes for the continued benefit of its residents and the travel and tourism industry.

## Destination Neighborhoods

Lee County as a destination can be divided into several distinct neighborhoods:

- Alva, Buckingham & Leigh Acres
- Boca Grande & Outer Islands
- Bonita Springs & Estero
- Cape Coral
- Captiva Island
- Fort Myers
- Fort Myers Beach
- Matlacha
- North Fort Myers
- Pine Island
- Sanibel Island

Each neighborhood has a unique set of attractions and appeals to visitors travel interest and needs in different ways.

# Lee County's Neighborhoods

## Neighborhoods with a Concentration of Attractors/Demand Drivers

- **Boca Grande & Outer Islands** – A barefoot lifestyle awaits guests and residents across these islands and beach-front playgrounds. Fishing is abundant as the “Tarpon Capital of the World”. The area beckons its guests to slow their pace and take in the beauty.
- **Captiva Island** – The stunning natural beauty of the beaches of Captiva Island provide tremendous allure for drawing visitors to the region while the resorts, restaurants, activities, and welcoming warmth of residents and climate continually reinforce the reasons for returning.
- **Fort Myers** – The destination is most frequently recognized in external markets by the name “Fort Myers.” The city is the centerpiece of the growing region and is known externally for its climate, access to beaches and outdoor recreation, and strong traditions in both baseball and innovation. Visitor amenities are scattered across the city and numerous distinctive neighborhoods help craft the charm of this community. Two sections of Fort Myers stand out for their emerging role as destination neighborhoods:
  - **Downtown Fort Myers** - The city center of the area features an entertainment district, performing arts, boutiques, and alfresco dining in a riverside environment.
  - **Southwest Florida International Airport (RSW)/ Florida Gulf Coast University** – This neighborhood is a destination in and of itself as home to the Southwest Florida International Airport, Florida Gulf Coast University, Hertz Arena, several innovative corporations and JetBlue Park at Fenway South.
- **Fort Myers Beach** – If beautiful resort properties and vacation rental options along the coastline of this island weren't compelling enough the enhancements of Times Square and the development of the region's only Margaritaville Resort add another element to the quaint appeal of the fishing and marina lifestyle across the bridge.
- **Matlacha** – The easily accessible connection to the surrounding sound draws artists to the creative colony of Matlacha, anglers to the “fishingest bridge in the world”, and travelers to the galleries and restaurants that benefit from their production.
- **Pine Island** – Just over the “fishingest bridge in the world” and connected to Matlacha, Pine Island is an agricultural paradise. Pine flatwoods, tropical fruit farms, and market stands dot this special area of Lee County.
- **Sanibel Island** – Often noted among list of the “best beaches”, Sanibel Island defines the beachcomber lifestyle of the region. On top of the amazing beaches is the one-of-a-kind 6,400-acre J.N. “Ding Darling” National Wildlife Refuge.



## Neighborhoods that Provide Hospitality Infrastructure & Attractions to Extend the Visitor Experience

- **Alva, Buckingham & Lehigh Acres** – The eastern edge of Lee County is surrounded by ranch land, parks, and natural preserves. Currently it does not have a high concentration of hospitality infrastructure, but will be pivotal in providing future recreational opportunities.
- **Bonita Springs & Estero** – Visitors are attracted to the retail centers (Miromar Outlets and Coconut Point), resort properties (Hyatt Regency Coconut Point Resort), The Wonder Gardens, and recreational opportunities within this inland district. Corporate campuses (e.g., Hertz) also draw business transient travelers.
- **Cape Coral** – Canals and waterways connect this vacation and residential community which is the centerpiece of the north side of the region. With home to resort properties (Westin Cape Coral Resort), marinas, golf, and a thriving entertainment district, Cape Coral is a vibrant draw for visitors.
- **North Fort Myers** – Farmlands and countryside combine with homes and parklands to create a unique blend of product and place that defines Lee County. The Shell Factory is notable as one of the region's longstanding regional attractions.

# VISITOR PROFILE

## Who Visits

The average visitor shifted from 54 years old with an average household income of \$102,900 in 2019 to 50 years old and average household income of \$105,950 in 2021. The shift in profiles also showed more college educated visitors (61% to 67%) and a more diverse ethnic mix (85% Caucasian to 79%).

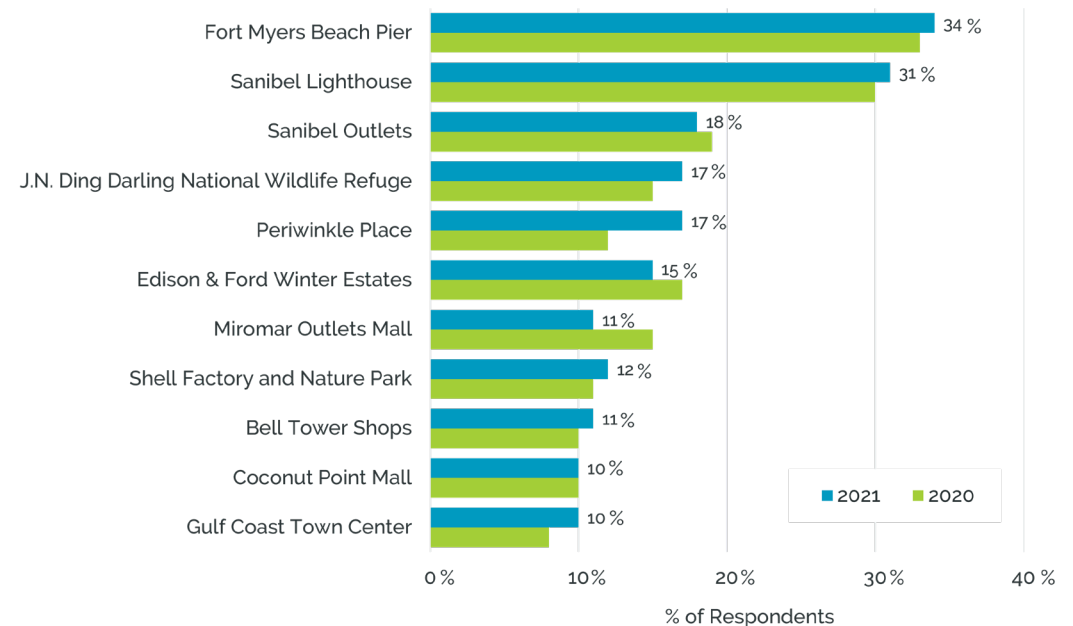
The pre- to post- pandemic shift also reflected more family travel as party size increased from 3.1 people in 2019 to 3.5 in 2021. Families (47% of parties in 2021) overtook Couples (42% of parties in 2019) as the top party type. Family parties were only 36% of the 2019 composition. The shift in family travel also reflected in more parties traveling with children under the age of 18 growing from 27% of travel parties in 2019 to 38% in 2021. These visitors shifted the top accommodations from 2019 to 2021 as Condo/Vacation Rentals grew from 31% to 41% in the same period and hotels stayed consistent hovering around 30%.

Visitors spent less time in the area as nights spent dropped from 9.9 in 2019 to 6.9 in 2021. First time visitors grew from 23% of travelers in 2019 to 32% in 2021. Frequent repeat visitors shifted also as the 29% of "more than 10 times" visitors dropped to 19% in 2021.

In total, the number of visitors to Lee County dropped from the record level of 4,926,400 in 2019 to 4,687,500 in 2021, while nights spent in the area grew from 5,588,700 in 2019 to 6,394,800. The target audience emphasis on spending growth of 14% as direct visitor expenditures went from \$3.272 billion in 2019 to \$3.730 billion in 2021.

With one exception, the changes in visitor profile did not alter the primary reasons for visiting Lee County as Vacation, Beach, and Relax and Unwind were the top three reasons pre- and post- pandemic. Visiting Friends and Relatives did shift, likely in conjunction with the big jump in family travel and first time visitors, dropping from 27% of the reason to visit in 2019 to 18% in 2021.

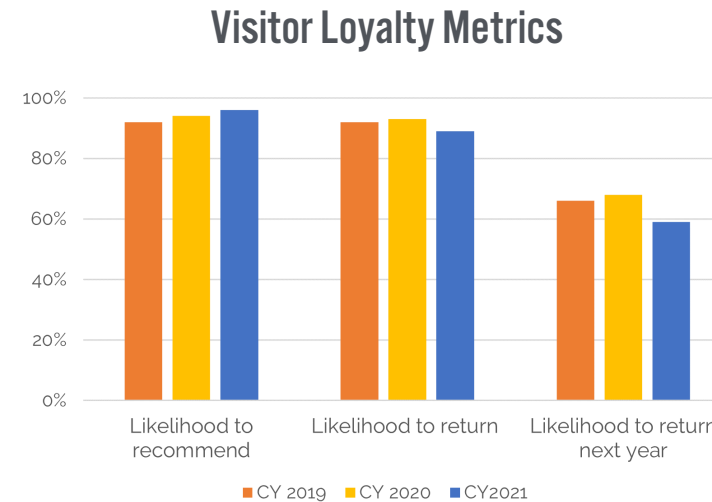
### Other Attractions Visited



\* Non-beach attractions; Percent of visitors reporting having visited during their stay  
Source: Downs St. Germain Research

# Visitor Satisfaction

Visitors in 2021 were slightly more likely to recommend friends to Lee County and slightly less likely to return than in 2020 or 2019. All years had high loyalty metrics. These metrics are similar to those enjoyed by other Florida beach communities; visitors to Florida beaches tend to develop a favored destination and return to it.



Source: Downs St. Germain Research

# Visitor Activities

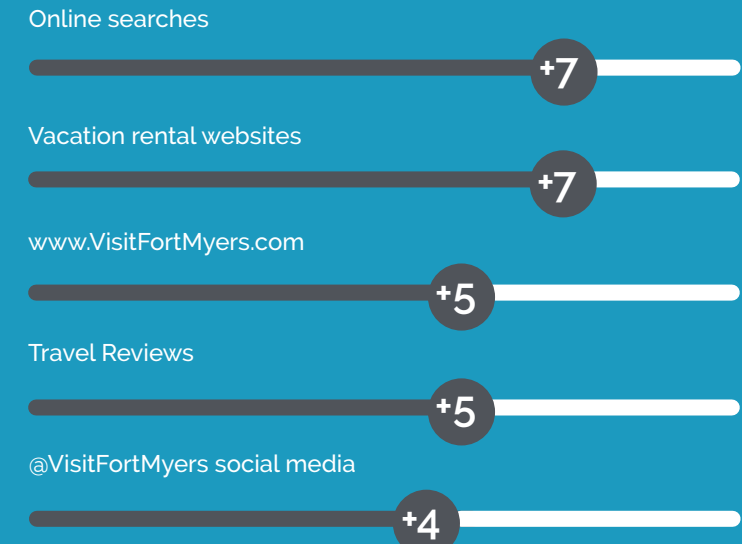
Visitors reported enjoying a range of activities during their stay in Lee County. The below illustrates the percent of visitors who reported participating in the activities in 2019, 2020, and 2021.

Activity	2019	2020	2021
Beaches	74%	67%	74%
Relax & unwind	68%	59%	69%
Dining	62%	51%	55%
Shopping	44%	34%	37%
Visiting friends/relatives	33%	29%	30%
Nature, environment, bird watching	32%	27%	30%
Water sports	19%	19%	29%
Biking, hiking etc.	19%	17%	23%
Bars, nightlife	15%	14%	15%
Attractions	19%	15%	13%

Source: Downs St. Germain Research

# Visitor Planning Sources

Growth in use of the below tools between 2019 and 2021



Source: Downs St. Germain Research

Visitors to Lee County reflect the ongoing industry trend of the importance of digital advertising and marketing.

Visitors (potential and converted) rely more and more on information gleaned from the Internet than printed publications.

The growth of applied searches and use of Fort Myers area planning sources is a good indicator of short-range interest in the area and the suggest continued growth in visitation to the area.

# DESTINATION ASSETS

Destination assets are the attractors, attractions, and hospitality infrastructure that compel a visit and ensure guests have an enjoyable stay. The experience the combination of these assets is able to provide are the destination's differentiators, especially compared to the range of offerings in other beach communities in Florida.

While the beaches are the primary driver for visitation to Lee County, sporting venues and other water-based natural recreational opportunities also serve to encourage travelers to choose the area for an overnight trip. Most attractors and attractions are situated west of Interstate 75.

## Hospitality Infrastructure

We define hospitality infrastructure as the businesses and amenities in a community that provide visitor services and make a stay more enjoyable such as hotels and lodging properties, dining, and retail.

Due in large part to the dual use of the amenities to service the area's residents, the hospitality infrastructure in Lee County is more evenly distributed. There are more than 13,000 hotel rooms in the County, and the Visit Lee County website lists more than 430 dining, retail, and visitor service providers.



## ATTRACTORS/DEMAND DRIVERS

Attractors play important roles in compelling a visitor's decision to make a trip to a particular place. Not all attractors and demand drivers are physical assets. In the case of Fort Myers demand drivers include local corporations prompting business travelers and local residents encouraging visiting friends and relative (VFR) travel.



## ATTRACTIONS

Attractions contribute to the region's appeal by offering potential experiences and activity in addition to the demand drivers. They each contribute to the area's appeal. Most all attractions are also amenities for residents to enjoy and use.



## HOSPITALITY INFRASTRUCTURE

The County's high concentration and variety of dining, retail and lodging (hotel and vacation rentals) establishments serves a variety of visitor types in the area. Additionally, the area's attentive and welcoming hospitality workforce and Guests First customer training program sets the area apart.



# PRIMARY DEMAND DRIVERS

## Beaches

The beaches are a primary driver for visitation to the region and together are Lee County's greatest attractor for visitation. The large majority of visitors in 2021 listed going to the beach as a top reason for their trip to the Fort Myers area.

## Sporting Events

The County's investment in Major League Baseball Spring Training facilities, as well as youth, collegiate, and amateur baseball fields work to attract more than 370,000 visitors to Lee County annually.

## Nature Activities & Water Sports

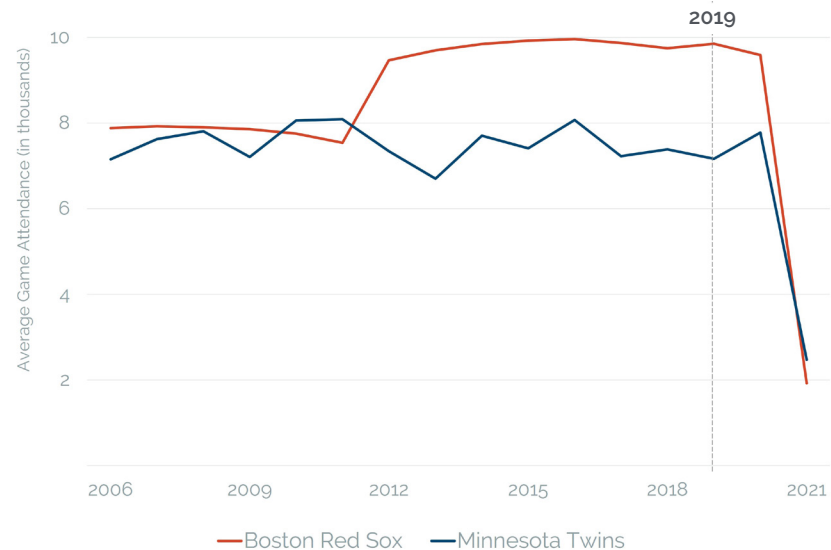
Data collected from Visitor Profile research suggests that a number of visitors take part in nature activities and water sports during their stay. The availability of trails, launch areas along the river, and marinas accommodate this activity. These assets and demand drivers also benefit the area's residents.

## Visiting Friends and Relatives

Visitor Profile data also suggests that a high proportion of guests travel to Lee County to visit friends and relatives. In 2021, 30% of visitors indicated that visiting friends and relatives was one of the reasons for their travel.



## Spring Training Attendance



Source: Lee County Sports Development

## SPORTING EVENTS

The Fort Myers area is home to Spring Training for the Minnesota Twins (since 1991) and the Boston Red Sox (since 1993). Attendance at Spring Training has increased steadily. In 2019, the teams hosted nearly 270,000 attendees. According to an impact study conducted by DPA, 70% of attendees at Spring Training games are overnight guests to Lee County.

The 2021 Spring Training season experienced a drastic reduction in attendance due to union contract negotiations. Total attendance across both teams dropped to 61,478.

The County's Parks and Rec department maintains several baseball complexes that meet the requirements of out of market travel and showcase baseball tournaments. The County's sports department estimates that more than 100,000 visitors travel to the area annually to participate in youth, collegiate, and amateur baseball events.

## NATURE ACTIVITIES & WATER SPORTS

Outdoor attractions, beyond beach activities and sports, include:

- Nature/bird watching (32%)
- Biking & hiking/walking (19%)
- Canoeing/kayaking/paddle-boarding/water sports (19%)
- Fishing (13%)

The natural environment of the Fort Myers area drives 10% of the visits to the area for bird watching and outdoor recreation at nationally recognized preserves and wildlife refuges like J.N. "Ding" Darling National Wildlife Refuge.

Source: Downs St. Germain Research



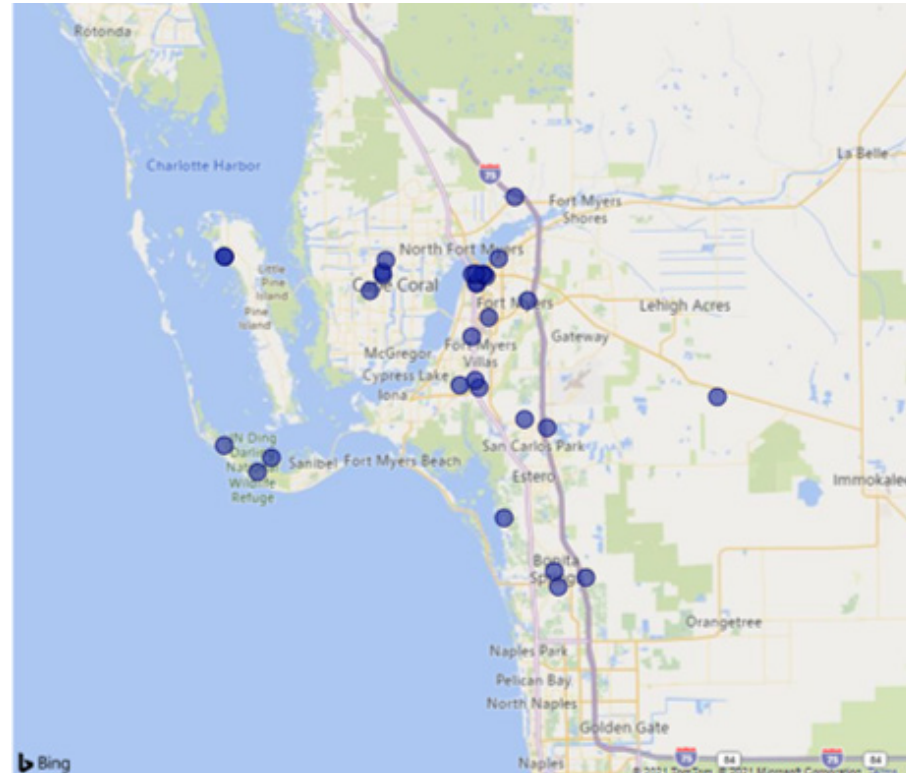
# VISITOR ATTRACTIONS

Visitor attractions are natural or man-made facilities, businesses, or experiences that provide diversionary activity options for people visiting an area. In Lee County, many of these options provide “rainy day” or off-beach activities. The attractions are also used and enjoyed by the area’s residents.

Examples of recent developments include:

- **Downtown Fort Myers:** A collection of entertainment, dining and boutiques along a picturesque riverfront is bolstered by conference and event space and walkable lodging options. Downtown Fort Myers is a vital gathering option for visitors and residents alike and hosts a number of festivals and events.
- **Performing Arts:** Performing arts are increasingly an attraction option for visitors. Led by several creative endeavors including the annual Island Hopper Songwriter Fest, the Gulf Coast Symphony and the Southwest Florida Symphony, and the Florida Repertory Theatre provide more distinctive and differentiated entertainment options than other areas of Florida.
- **Public Art and Art Galleries:** Public art and murals combine with enticing art galleries to provide visual stimulation and take-home reminders of the abundant beauty of Lee County.

## ATTRACTIONS THAT EXTEND VISITS



Source: Lee County VCB, Clarity of Place

Edison and Ford Winter Estates



McCollum Hall in Dunbar



Island Hopper Songwriter Fest



# HOSPITALITY INFRASTRUCTURE

## Lodging Properties

As of December 2021, the County had over 13,000 hotel rooms, the majority of which are in the Upscale and Midscale categories. There were 153 hotel properties in Lee County. Lee County is also home to more than 17,000 short-term rental properties providing an alternative to traditional hotel stays.

## Dining & Retail

The Lee County Visitors and Convention Bureau lists more than 280 dining establishments and 158 shopping amenities for visitors.

## Meeting and Conference Venues

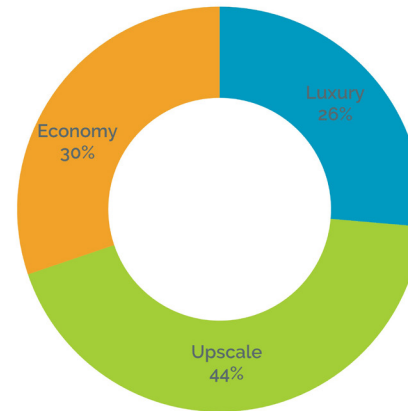
According to STR, visitors attending meetings and conferences made up 5.8% of visitors during the first 8 months of 2021. Most of meetings and conferences in Lee County are relatively small corporate meetings and moderate sized trade association gatherings.

## Customer Care

The Guests First training program is a best-in-class hospitality program offered and administered by the Lee County VCB. The lessons in customer service extend the destination's brand of world-class visitor service. The organization's commitment to providing tools and other resources to service providers across the tourism field ensures that a greater percentage of visitors to Lee County will encounter high-levels of care and support.

## LODGING SUPPLY

Available Rooms, 2021



Source: CoStar



## COMPARABLE SUPPLY

Market	Number of Rooms	Number of Properties
St. Petersburg/Clearwater	22,189	309
Palm Beach	18,413	164
Fort Myers	13,140	153
Key West	10,377	185
Naples	7,691	67
Sarasota	7,236	104

Source: STR, December 2021

## MEETING AND CONFERENCE SPACE

- Downtown Fort Myers: Luminary Hotel + Caloosa Sound Convention Center (243 rooms & 51,885 total SF event space)
- Fort Myers: Marriott Sanibel Harbour Resort & Spa (347 rooms & 45,000 SF meeting space)
- Captiva: South Seas Island Resort (424 rooms & 45,000 SF meeting space)
- Bonita Springs & Estero: Hyatt Regency Coconut Point Resort (462 rooms & 83,800 SF meeting space); Embassy Suites Fort Myers Estero (150 rooms & 5,080 SF meeting space); Holiday Inn, Ft. Myers Airport at Town Center (169 rooms & 7,000 SF meeting space)
- Cape Coral: Westin Cape Coral Resort at Marina Village (308 rooms & 50,000 SF meeting space)
- Sanibel: Sundial Beach Resort (225 rooms & 23,000 SF meeting space)

# TRANSPORTATION INFRASTRUCTURE

## Roadways

Interstate-75 is the most visible highway artery connecting to Charlotte County to the north and Collier County to the south. Within Lee County there are 19 County roads.

Congestion is most often felt on the bridges spanning waterways in the county. In the Cape Coral/North Fort Myers & Fort Myers area, this congestion corresponds to rush hour commute times. In the areas involving island bridges much of the congestion is directly connected to trade traffic moving in and out to service properties on the islands.

Public transportation options provide access to beach areas across Lee County. This transportation service could potentially provide congestion relief if coordinated and targeted to address workforce shifts. Additional research on possible visitor usage is also necessary, but the service would need to be creatively deployed to appeal to guests.

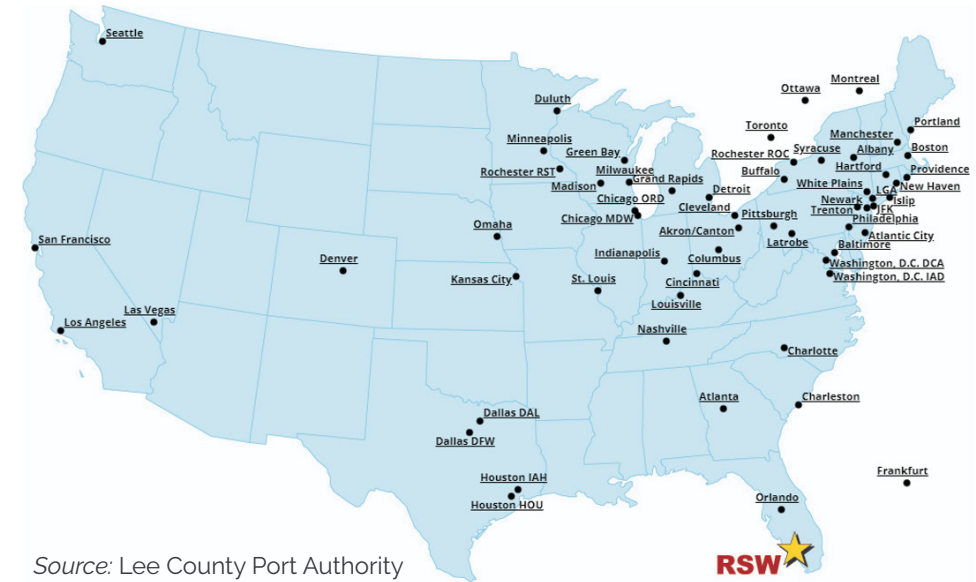
## Air Lift

RSW is the primary airport through which visitors arrive to the area, Punta Gorda Charlotte County Airport which is approximately 30 miles from Fort Myers, is used by approximately 10% of visitors to the area.

The Lee County Port Authority reports that in 2021, the airport saw just over 5.19 million passenger enplanements up 39% from 2009. *Simple Flying*, the leading independent voice for aviation news and insight, noted in May of 2021 that RSW is the best performing airport by added seats since summer of 2019. RSW has 3 concourses with 28 gates.

- Rental Car outlets: 10 on-site, 2 off-property
- Airlines: 14 Carriers providing nonstop service to 64 destinations.
- International: Class A Port of Entry. Designated Foreign Trade Zone

## NON-STOP SERVICE TO RSW



## RSW Expansion

A \$331 billion terminal expansion and renovation project is underway for RSW. The expansion will consolidate TSA checkpoints into one location, remodel 164,000 sq. ft. of space and create 117,000 sq. ft. of new walkways and concessions space. Construction is scheduled to take place over three years.

## Water Access

Several marinas allow for water accessibility and service the Key West Express and private boats. Several resorts have active marinas and lodging amenities to encourage overnight stays (e.g., Yacht Harbour & Marina at South Seas Island Resort)

# MARKET CONTEXT

The market context of a destination often suggests areas of opportunity to leverage non-tourism activity to encourage more visits. Market forces and trends also have an impact on the destination since the local policies and regulations to encourage or mitigate the trends will also impact destination partners or destination assets.

In 2019, Leisure and Hospitality jobs made up roughly 11.5% of employment in Lee County. Since 2013, the number of jobs in Leisure and Hospitality has grown nearly 5%.

## Population

Compared to the surrounding counties (i.e., Collier and Charlotte), Lee County has by far the largest population. Of the three counties, Lee County has a higher percent of its population for persons under 18 years old and a lesser percent of its population over 65 years old.

The population of Lee County is more prosperous than that of Charlotte County, but less than Collier County.

Census blocks in the beach areas and along the waterways tend to be home to the older generations in Lee County. Census blocks in the inland areas and in the eastern part of the County are home to the younger generations.

## Employment

By virtue of its larger population, Lee County also has more employer establishments than the other two counties and much higher total employment.

Compared to the national average, all three counties have a higher concentration of Leisure and Hospitality jobs. Collier County had the highest concentration in 2019, with 1.76 times higher concentration than the national average. Lee County had a concentration on 1.45 times more, and Charlotte County had a concentration of 1.42 times more.

## Visitor Inducing Industries

Business transient travel is most often spurred by activity in the “traded” industries—businesses that sell goods and services in markets outside the region. Lee County has a lower concentration of jobs in these industries than the national average, yet collectively, these industries spur some business transient demand.

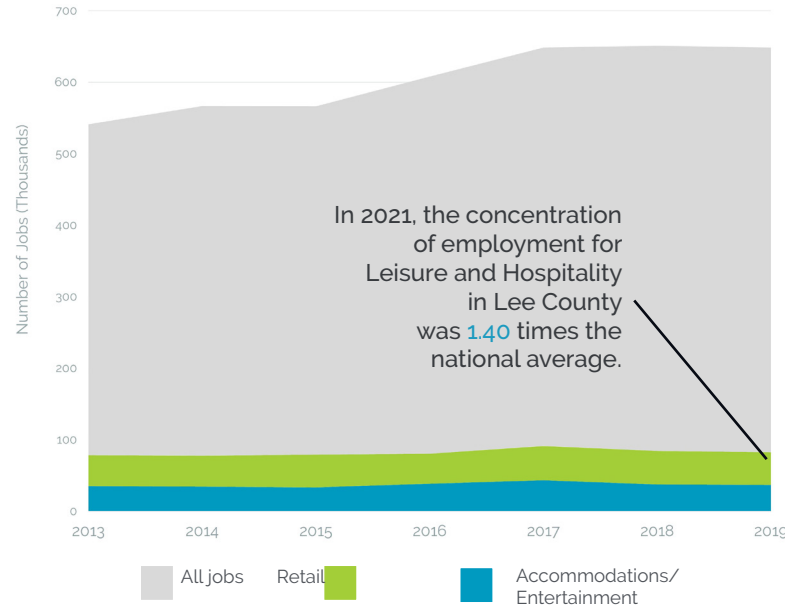
A strong construction market often contributes to hotel occupancy (given the need for short-term housing). Lee County has 2.34 times the concentration of construction jobs than the national average.

## JOB GROWTH IN LEE COUNTY

**8.8%**  
% of Jobs in Lee County  
in Hospitality and Leisure  
(2021)

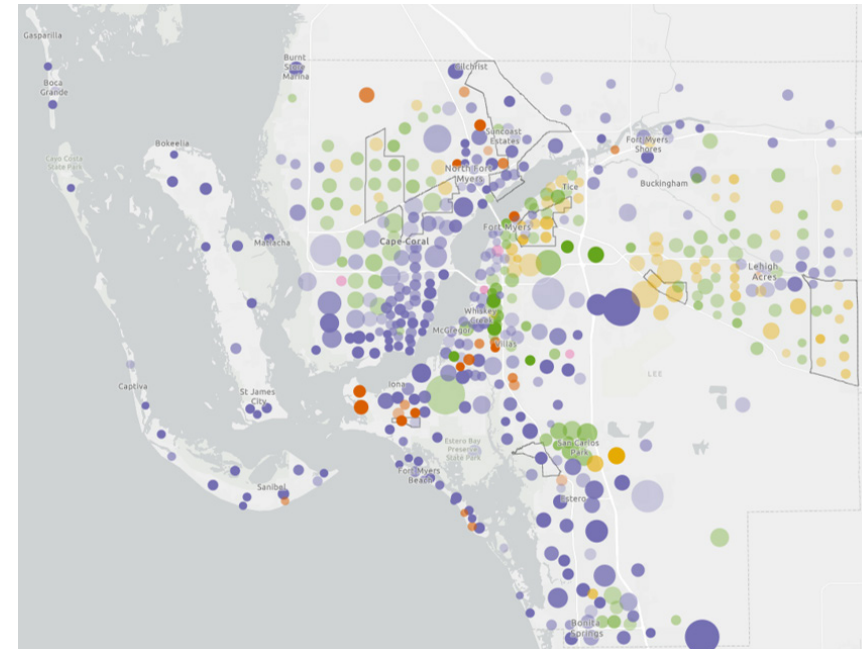
**9%**  
Growth in Hospitality and  
Leisure Jobs since 2017

**15.8%**  
Growth in All Jobs  
since 2017



Source: US Bureau of Labor Statistics, 2021

## DEMOGRAPHIC DISTRIBUTION



Source: University of South Florida, ESRI

## COUNTY COMPARISON (2021)

	Lee	Collier	Charlotte
Total population	787,976	385,980	194,843
% Growth 2010-21	27.3	20.0	21.8
% Over 65 years old	29.2	32.9	40.8
Median household income	\$59,608	\$70,217	\$52,724
Median home value	\$235,300	\$366,600	\$209,500

Source: US Census - Quick Facts

## SAMPLE OF TOP REGIONAL EMPLOYERS IN TRADED INDUSTRIES

- Arthrex** – Global HQ of medical devices manufacturing and development firm specializing in arthroscopic & sports medicine
- Alico** – Citrus/conservation agribusiness
- Gartner** – World's leading market research and data advisory company
- Hertz Global Holdings** – Corporate HQ Hertz, Dollar, and Thrifty rental car brands operator with more than 1,000 employees locally
- NEOGenomics** – Corporate HQ of cancer diagnostics and pharma services firm
- Chicos** - Global HQ of national retailer of apparel and accessories Brands include: Chico's White House Black Market, Soma and TellTale.

# STAKEHOLDER INPUT

Stakeholder input is used to validate the above assessments and to uncover other community priorities. The focus groups and interviews uncover shared concerns. Stakeholder engagement and input at the beginning of the process ensures the plan's direction and focus reflects the shared vision and goals for the destination.

Between late July and mid-September 2021, Clarity of Place facilitated 32 interviews and 10 focus groups organized and scheduled by the Lee County VCB. A list of the individuals who participated is included in the Appendix.

These input sessions helped clarify programs and opportunities influencing the destination direction. In total, over 157 individuals provided input and guidance for the plan and its direction.

The lingering effects of COVID-19 - in particular the Delta variant - continued to influence stakeholder perceptions of the area's ability to recover. The majority of the interviews and focus groups were held during a spike in hospitalizations.

## SUMMARY THEMES

The following themes emerged from the combined input of the various stakeholder sessions. These common themes point to some clear opportunities and needs for the area—as a great place to visit or live and often both.

### Conservation & Growth

Stakeholders recognize that natural resources drive leisure demand and leisure demand drives economic activity in the region, as well as spurring more growth. Conservation of open space, water quantity, water quality, and wildlife is fundamental to the region's quality of life. As with other destinations that rely on their natural resources to drive visitation, the Lee County VCB must advocate and support efforts to balance conservation of the natural environment and the effects of continued population growth.

## Base Questions

- How can this plan shape the direction of Lee County and its communities?
- What priority needs to be addressed through this plan?
- What new assets strengthen competitiveness?
- What infrastructure improvements are needed to improve appeal to residents and visitors?
- How do residents view visitors?
- How do our guests view Lee County?
- How do we want them to view Lee County?
- How will we determine if this plan is a success?
- Are there any additional or outside thoughts beyond the posed questions?



Given the ongoing 50-year trend, continued and sustained population growth can be assumed, and the area will need to respond accordingly to absorb future growth.

### **Brand Beyond the Beaches**

Stakeholders know that the area's beaches are iconic and one of the main reasons visitors come to the area. However, they also recognize that the growth of the area has created other attractions for which the destination should be known. Stakeholders also agree that the destination has a reputation for providing an ease of travel and relaxed atmosphere for visitors.

### **Placemaking & People**

The shifting demographics of the area provide an opportunity to develop more inclusive and engaging places. Stakeholders recognize that there are concentrations of visitor amenities and activities throughout the region; however they are not well interconnected.

Stakeholders believe that the Lee County VCB should leverage and encourage the movement towards more inclusive and engaging places in the region and market the opportunity to experience them to visitors.

### **Outreach that Drives Demand**

Strategic sales, marketing, and communications have been pillars of the Lee County VCB's success and part of what has driven visitor demand for the area. Sports have helped to address some seasonal business needs. Pent-up demand has helped Lee County address COVID-19 related business recovery, shifting the demand across international and business travel markets.

Stakeholders believe that the Lee County VCB has the opportunity to leverage future demand by adjusting how they position their assets based on emerging market opportunities such as demographic changes, air service access, and family travel.

### **Hospitality Workforce Concerns**

Workforce is a dominating industry challenge. Addressing the crisis is a long-term operational requirement rather than a temporary necessity. Stakeholders believe that the Lee County VCB should support efforts to fill the gaps in the short-term, as well as be involved in longer-term discussions to ensure there is an ample hospitality workforce to continue to service the area's visitors.

## **Focus Groups**

- Parks, Beaches, Natural Areas, Charter Groups, Soft Adventure, Outfitters, and Guides
- Resorts and Unique Lodging
- Hotels
- Attractions, Arts, Culture, History
- Retail and Restaurants
- Meetings/Conferences and Event Planners
- Chambers of Commerce and Business Associations
- Vacation Rentals
- Community Services
- Sports Promoters and Venues

# SWOT & SCAN TAKE-AWAYS

Lee County stands out for ease of access and consistency of appeal as both a destination and a place to live. Lee County has the opportunity to increase connectivity between the beaches and the growing inland hospitality infrastructure and attractions to strengthen the destination's competitiveness.

## ASSETS TO LEVERAGE

- Best-in-class visitor services
- Variety of visitor-facing amenities/hospitality infrastructure
- Visitor loyalty
- Community strength and safety
- Meeting venues
- Youth sport friendly brand
- Growing traded industry cluster
- Airlift and accessibility



## DESTINATION ASSET NEEDS

- Better connectivity between beaches and inland amenities (both in terms of transportation infrastructure and Broadband)
- Better promotion of the area neighborhoods and their existing visitor-facing amenities and hospitality infrastructure
- Continued support for conservation efforts and strategic plan for marketing those amenities to visitors
- Showing the value of the visitor economy to residents

## IDENTIFYING OPPORTUNITY

As part of their efforts to set a baseline for recovery, the VCB staff undertook a SWOT analysis of the destination in the Summer of 2021.

### Strengths

- » Natural beauty and assets
- » Wildlife
- » Commitment to conservation
- » Beaches and unique islands
- » Sunshine and warm climate
- » International airport/ Easy access
- » Authentic experiences
- » Laid back, shoulder-drop feeling
- » Friendly locals/ welcoming neighborhoods
- » Budding communities/ opportunities for business
- » 2 Spring Training teams
- » Activities and attractions for all generations
- » Great Parks and Rec facilities
- » Clean community/Pride in our area
- » Relatively safe destination
- » Repeat visitors
- » Intellectual capital
- » Smart growth
- » Universities

### Weaknesses

- » Limited public parking at beaches
- » Lack of large scale meeting space over 100,000 SF
- » Transportation costs from RSW (airport) to beach resorts
- » Limited biking paths/sidewalks/walkable community paths
- » Limited number of ADA accommodations in historic facilities
- » Independently-owned properties need renovations and upgrades
- » Community awareness of the roles of the VCB, Sports, and Economic development
- » Lack of "late night" or night life activities and planned attractions
- » Perceived as a retirement destination
- » Awareness of where Fort Myers is located geographically
- » The name of "Southwest Florida International Airport" is not specific
- » Long travel times between largest meeting hotels/resorts

### Opportunities

- » Collaborations with small businesses (diversity)
- » Relationship building-local businesses and City departments
- » Diversity
- » Accessibility
- » Water Taxi- Public Island Hopping
- » Conservation 20/20, passive recreation
- » Community engagement and education
- » Member outreach, industry relationship advocates within the community
- » Vacation rental outreach
- » Arts and culture
- » Creative growth and reallocation of talents (internally)

### Threats

- » Water quality (red tide, algae blooms)
- » COVID- worker shortage (service quality decrease)
- » Infrastructure issues/population growth /increase-traffic/overcrowding
- » Intense weather changes, makes all issues listed above worse
- » Lack of renovations/updates-full service/meeting product
- » Inflation/global economy
- » Politics (International and Domestic)
- » Affordable housing



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