Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

April – June 2022

Visitor Tracking, Occupancy & Economic Impact Study

Introduction

STUDY OBJECTIVES: MAP THE VISITOR JOURNEY

Pre-Visit

- Planning cycle
- Planning sources
- Information requests
- Other destinations considered
- Trip influencers
- Reasons for visiting
- Exposure to promotions
- Booking
- Mode of transportation

Travel Party Profile

- Visitor origin
- Party size
- Party composition
- Demographics

Trip Experience

- Accommodations
- Length of stay
- Number of times in destination
- Activities in destination
- Attractions visited
- Area stayed

Post-Trip Evaluation

- Likelihood of recommending
- Likelihood of returning
- Satisfaction with overall stay & customer service
- Evaluation of destination attributes
- Visitor concerns
- Painting a picture for others

Economic Impact on Destination

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

Executive Summary

QUARTERLY SNAPSHOT

April – June 2022

- **Visitors are up, yet room nights are essentially** stable because of a decrease in length of stay and more reliance on the Department of Business and Professional Regulation's estimate of rental units available
- The **travel planning cycle** was **shorter** compared to 2021
- There were more **international visitors** compared to April-June 2021 and January-March 2022
- More **first-time visitors came to the Fort Myers area** compared to 2021
- **Satisfaction metrics were down** compared to 2021

68.4%	$190.79	$130.50
OCCUPANCY RATE	AVERAGE DAILY RATE	REVENUE PER ROOM
↓ 8.6% from 2021	↑ 18.7% from 2021	↑ 8.5% from 2021

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

TOURISM SNAPSHOT: KEY METRICS APRIL – JUNE 2021 VS. 2022

Visitor & Lodging Statistics	April – June 2021	April – June 2022	% Change '21-'22
Visitors[1]	1,309,300	1,477,100	+ 12.8%
Room Nights[1]	1,766,300	1,748,800	- 1.0%
Direct Expenditures[2]	$996,169,300	$1,206,349,700	+21.1%
Total Economic Impact[3]	$1,587,893,900	$1,921,715,100	+21.1%

[1] Visitors are up, yet room nights are essentially stable because of a decrease in length of stay and more reliance on the Department of Business and Professional Regulation's estimate of rental units available

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

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

TOURISM SNAPSHOT: KEY METRICS YEAR TO DATE

Visitor & Lodging Statistics	CYTD 2021	CYTD 2022	% Change '21-'22
Visitors	2,223,100	2,603,600	+ 17.1%
Room Nights	3,320,800	3,734,700	+ 12.5%
Direct Expenditures[1]	$2,002,782,300	$2,617,113,300	+ 30.7%
Total Economic Impact[2]	$3,192,435,000	$4,169,061,500[3]	+30.7%

[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.

April – June LODGING STATISTICS

68.4%	$190.79	$130.50
Occupancy	ADR	RevPAR
↓ 8.6% From 2021	↑ 18.7% From 2021	↑ 8.5% From 2021

VISITOR JOURNEY: PRE-VISIT

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

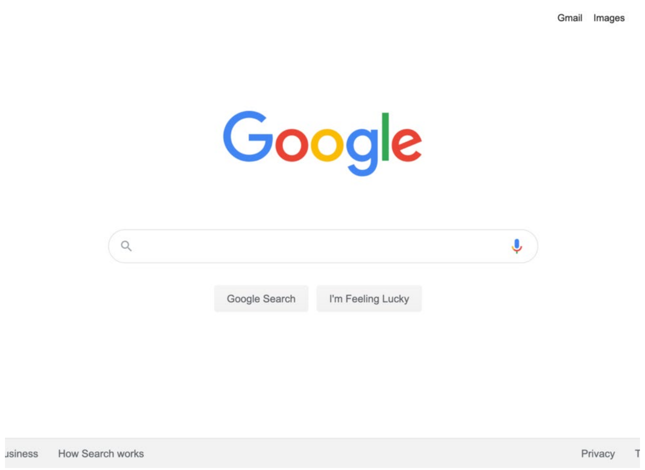
Economic Impact on Destination

TRIP PLANNING

- Over half of visitors planned their trips to the Fort Myers area less than 3 months in advance
- Nearly 2 in 5 visitors requested information to plan their trips
  - Over 1 in 4 called a hotel, motel, or condo when planning their trips
- 29% of visitors considered choosing other destinations when planning their trips

TRIP PLANNING: WEBSITES/APPS USED

- More than **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]:



31% Search engines

25% Airbnb, VRBO, Homeaway, or similar website

24% Airline websites/apps

[1]Multiple responses permitted.

TOP TRIP INFLUENCERS

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

94% Peaceful/relaxing

93% Warm weather

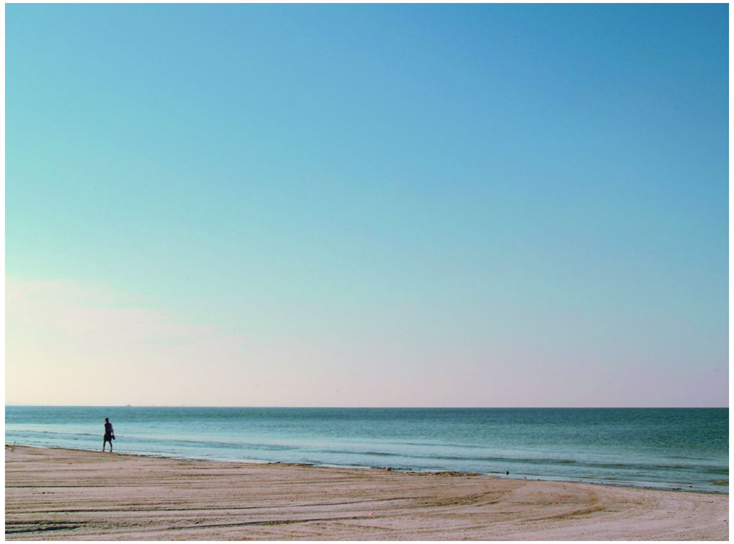
91% Safe destination

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

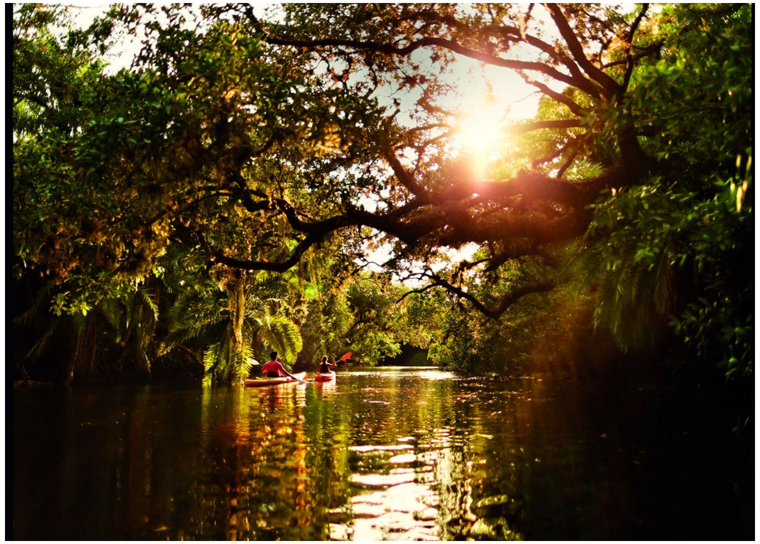
TOP REASONS FOR VISITING

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

61% Vacation



56% Beach



39% Relax & unwind

[1]Three responses permitted.

PROMOTIONS

- 45% of visitors recalled promotions in the past 6 months for the Fort Myers area
- 24% of all visitors were influenced to come to the Fort Myers area by these promotions
- Top sources of recall include[1]:

42% Internet

35% Social media

[1]Multiple responses permitted.

BOOKING

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

45% Directly with hotel

15% VRBO, HomeAway

14% Other online travel agency

11% Airbnb

10% Vacation rental company

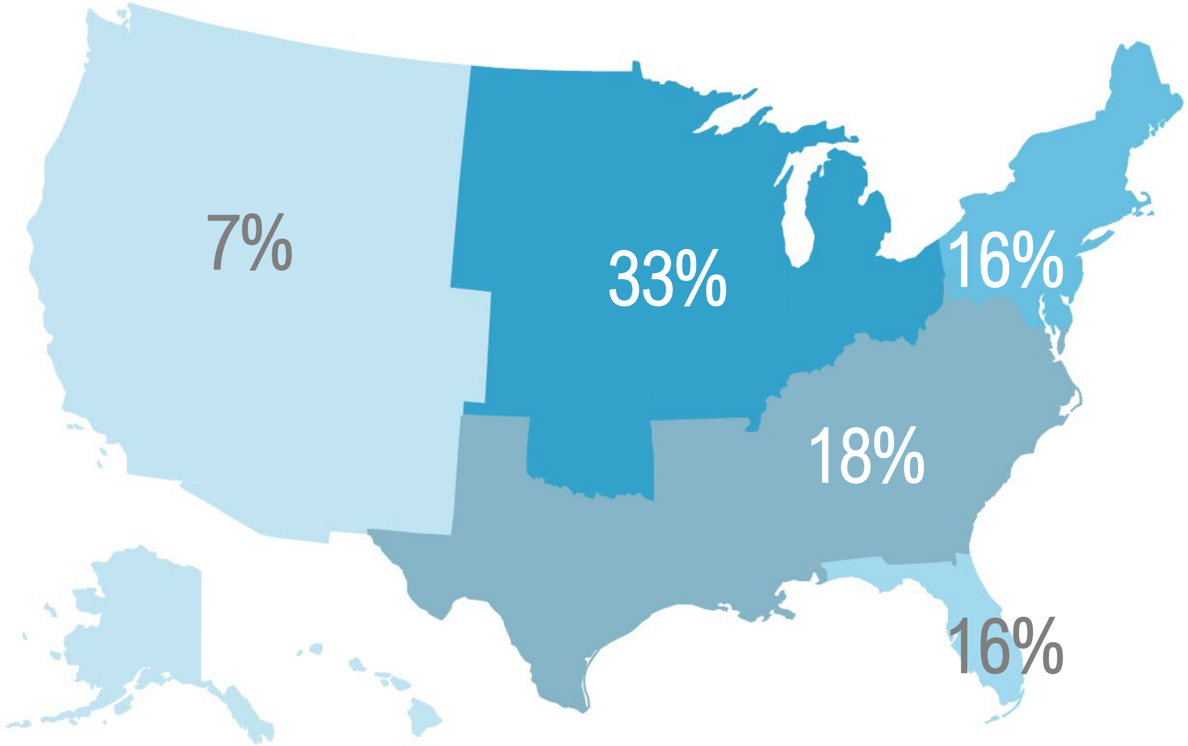
TRANSPORTATION

- 66% of visitors flew to the Fort Myers area
- 55% of all visitors traveled to the Fort Myers area via RSW

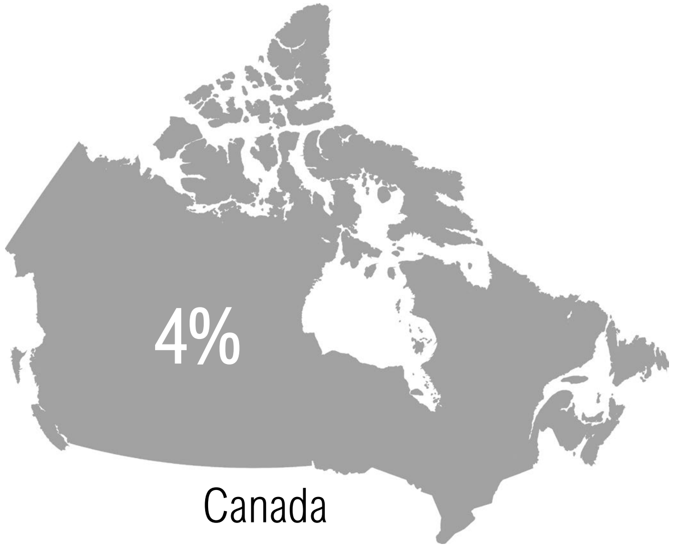
VISITOR JOURNEY: TRAVEL PARTY PROFILE

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

ORIGIN REGION[1]



US = 90%

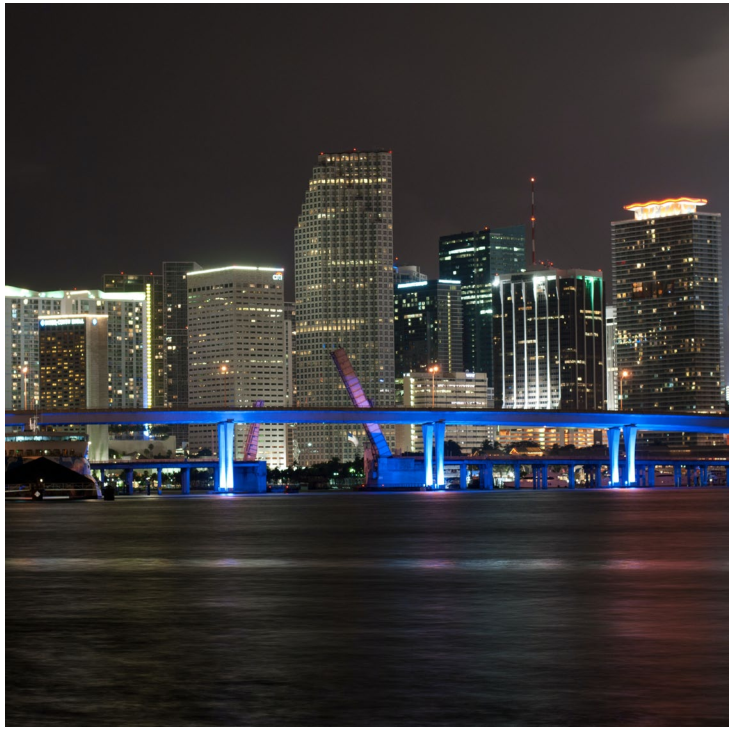


Canada

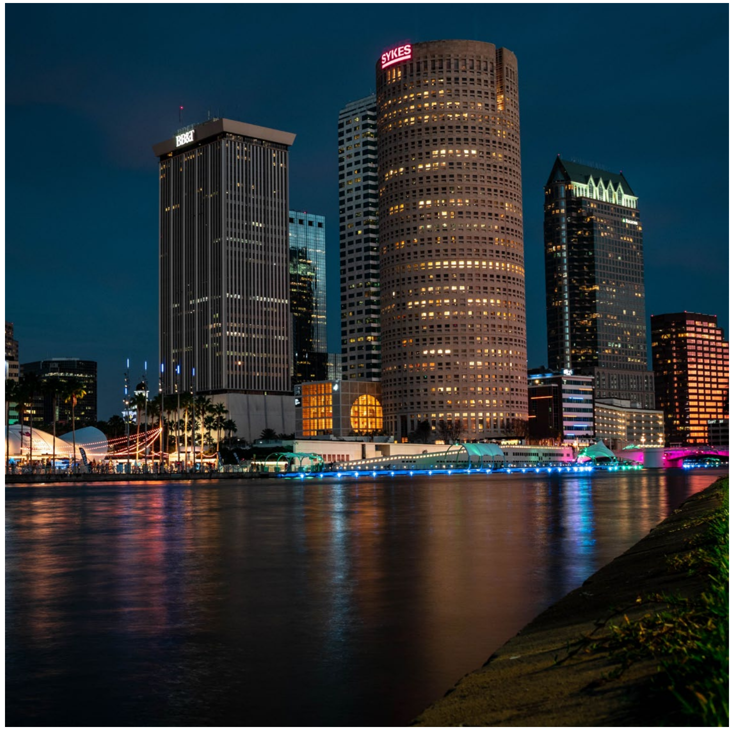
6% Other International Markets

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

TOP ORIGIN MARKETS[1]



5% Miami – Ft. Lauderdale



5% Tampa – St. Petersburg

4% New York

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

TRAVEL PARTY SIZE AND COMPOSITION

- Visitors traveled in a party composed of 3.2 people[1]
- 41% traveled with children under the age of 18
- 44% traveled as a family, while a third of visitors traveled as a couple

[1]Sources: Occupancy Study for visitors staying in paid accommodations and Visitor Tracking Survey for all other visitors

DEMOGRAPHIC PROFILE

April – June Visitors:

- Average age of 50 years old
- Median household income of $108,300
- Married (73%)
- College educated (67%)
- Caucasian/white (79%)
- Male (52%)

Visitor Journey: Trip Experience

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

TOP ACCOMMODATIONS

39% Condo/Vacation Rental

32% Hotel/Motel/Resort/B&B

24% Non-paid Accommodations

LENGTH OF STAY & NUMBER OF TIMES IN DESTINATION

- Visitors[1] spent an average of **5.6 nights** in the Fort Myers area
- **36%** were **first time** visitors
- **18%** have visited **more than 10 times**

[1]Sources: Occupancy Study for visitors staying in paid accommodations and Visitor Tracking Survey for all other visitors

VISITOR ACTIVITIES

- Top visitor activities include[1]:

77% Beaches

71% Relax & unwind

54% Dining

[1]Multiple responses permitted.

TOP ATTRACTIONS VISITED[1]

79% Beaches

43% Fort Myers Beach Pier

31% Sanibel Lighthouse

[1]Multiple responses permitted.

TOP COMMUNITIES STAYED

25% Sanibel Island

21% Fort Myers Beach

20% Fort Myers

13% Cape Coral

VISITOR JOURNEY: POST-TRIP EVALUATION

SATISFACTION

- 95% of visitors are likely to recommend the Fort Myers area
- 87% of visitors are likely to return
- 59% of visitors are likely to return next year

SATISFACTION

- **97%** of visitors were **satisfied or very satisfied with their overall visit** to the Fort Myers area (62% were very satisfied)
- **93%** of visitors were **satisfied or very satisfied with customer service** on their visit (59% were very satisfied)
- **39%** of visitors said paid accommodations **exceeded their expectations** (96% met or exceeded expectations)

TOP ATTRIBUTE RATINGS

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

98% Warm weather

97% Peaceful/relaxing

96% White sandy beaches

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

VISITOR CONCERNS

- Over 1 in 3 visitors were concerned about traffic in the Fort Myers area

→ 1 in 5 were concerned about beach seaweed or high prices

→ 1 in 4 visitors had no concerns at all about the destination

AREA DESCRIPTIONS

Beautiful Beaches

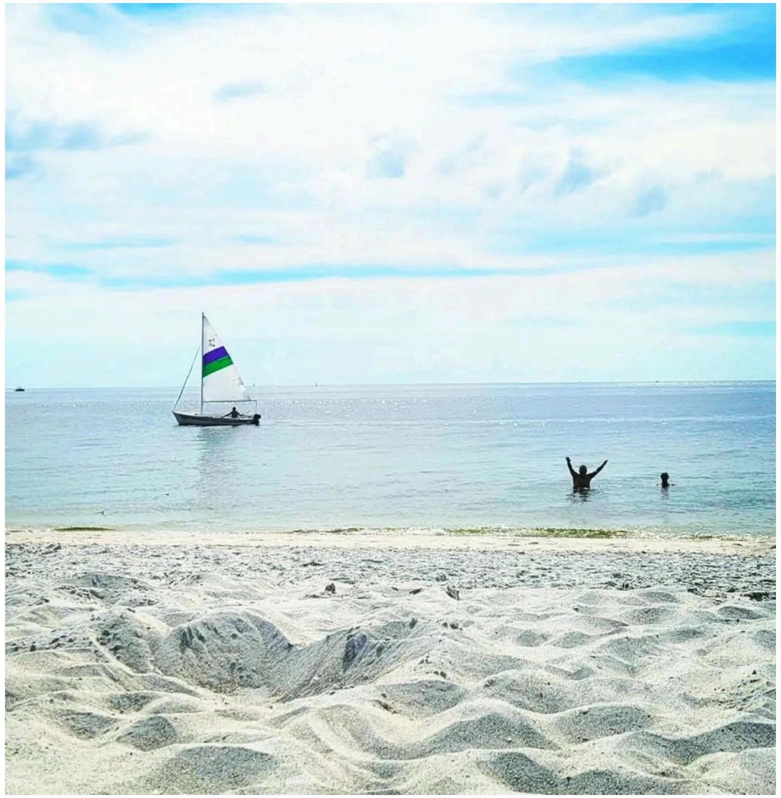
"The beaches are so refreshing on a hot day. We loved watching the dolphins. Great ice cream too right on the beach."

Wonderful Place to Visit

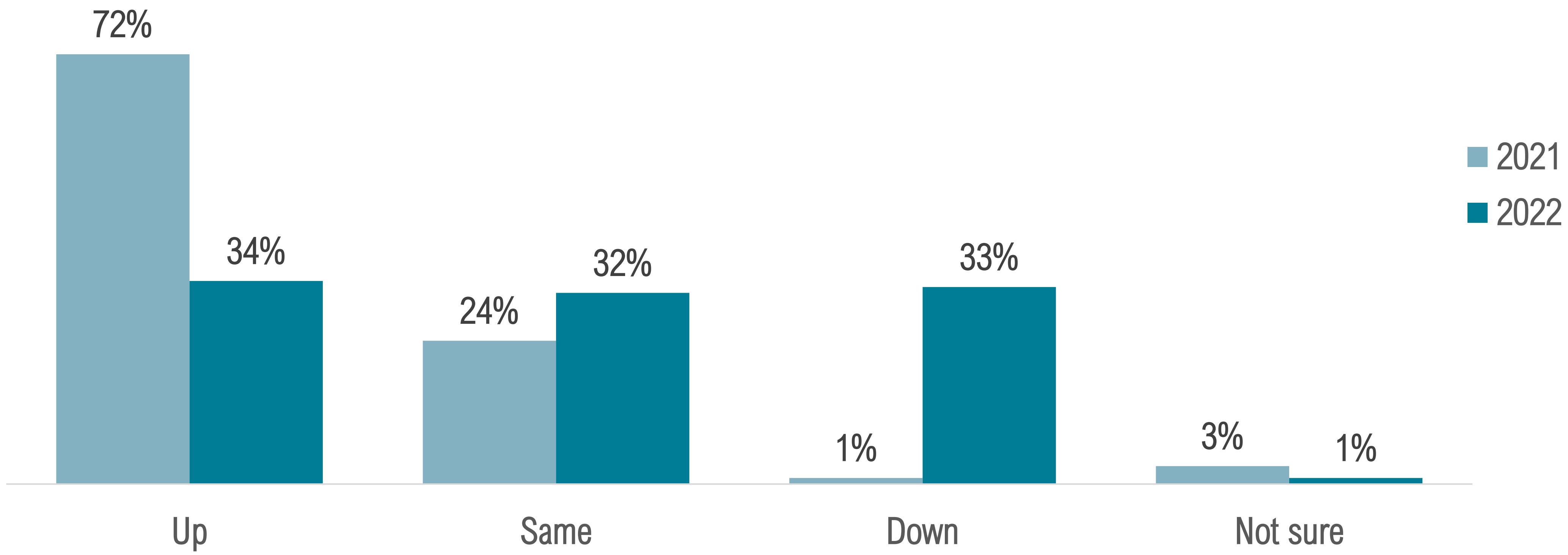
"The area is wonderful for a long getaway. We enjoyed the history and the museums."

Warm Weather

"Wonderful weather, gorgeous beaches, stellar atmosphere, and family oriented."



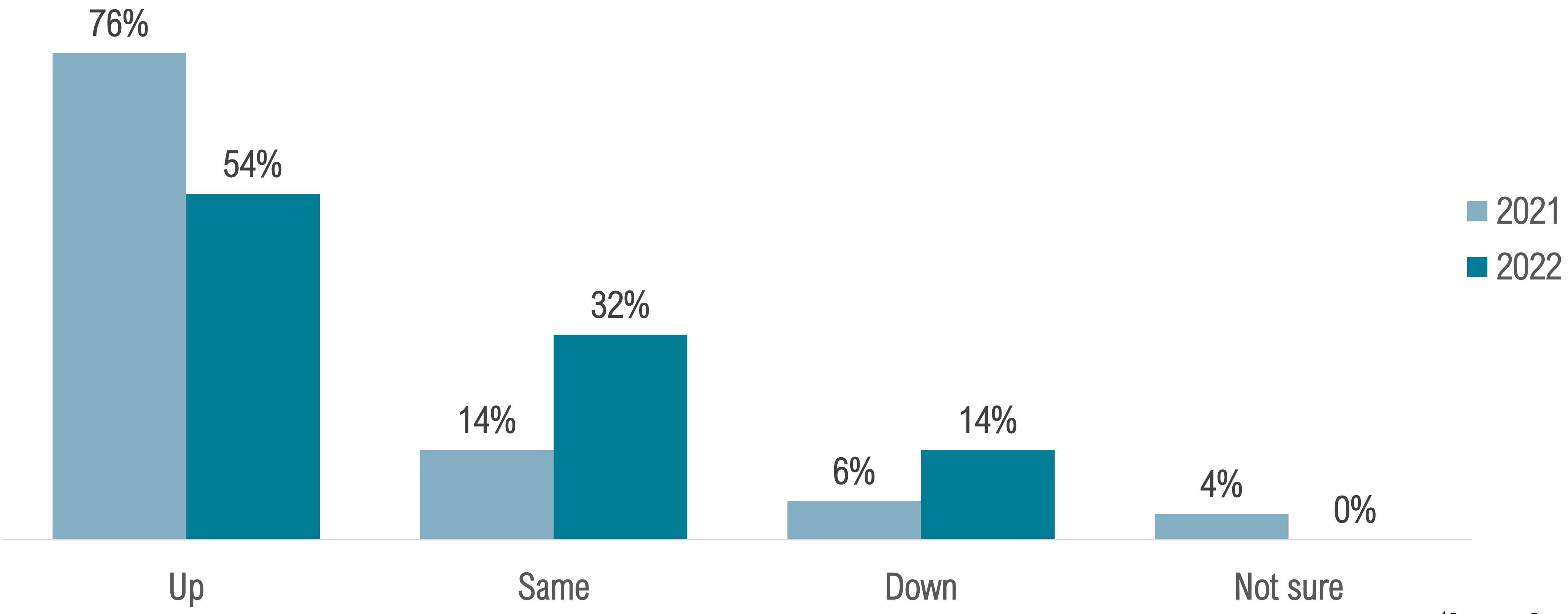
OCCUPANCY BAROMETER[1]: JULY – SEPTEMBER RESERVATIONS



[1]Sources: Occupancy Survey

Accommodations partners were asked the following, "Please think about your reservations for the next three months. Compared to July through September of 2021, would you say the total level of reservations are up, the same, or down?"

OCCUPANCY BAROMETER[1]: OCT – DEC RESERVATIONS



[1]Sources: Occupancy Survey

Accommodations partners were asked the following, "Please think about your reservations for the next three months. Compared to October through December of 2021, would you say the total level of reservations are up, the same, or down?"

Post-Trip Evaluation
April – June 2022

fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

downs & st. germain RESEARCH

Detailed Findings

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

Pre-Visit

Travel Party Profile

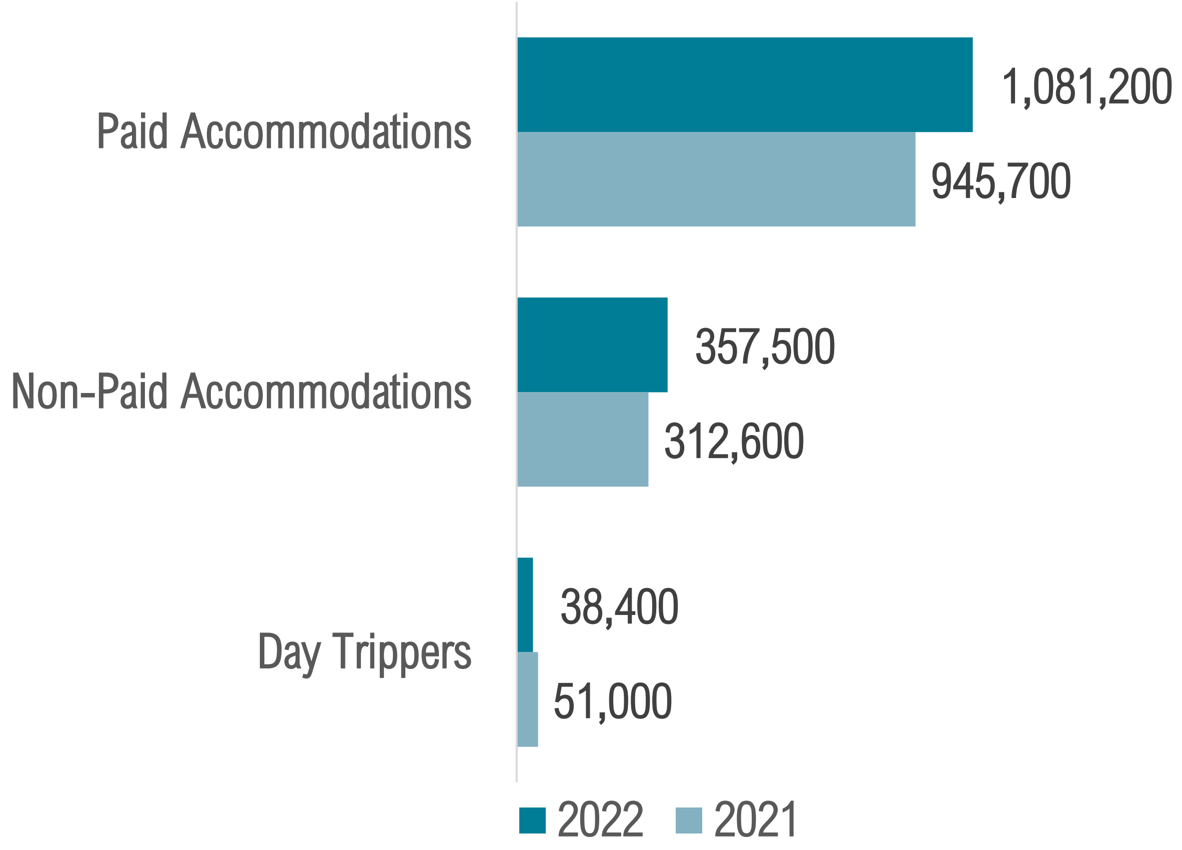
Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

NUMBER OF VISITORS

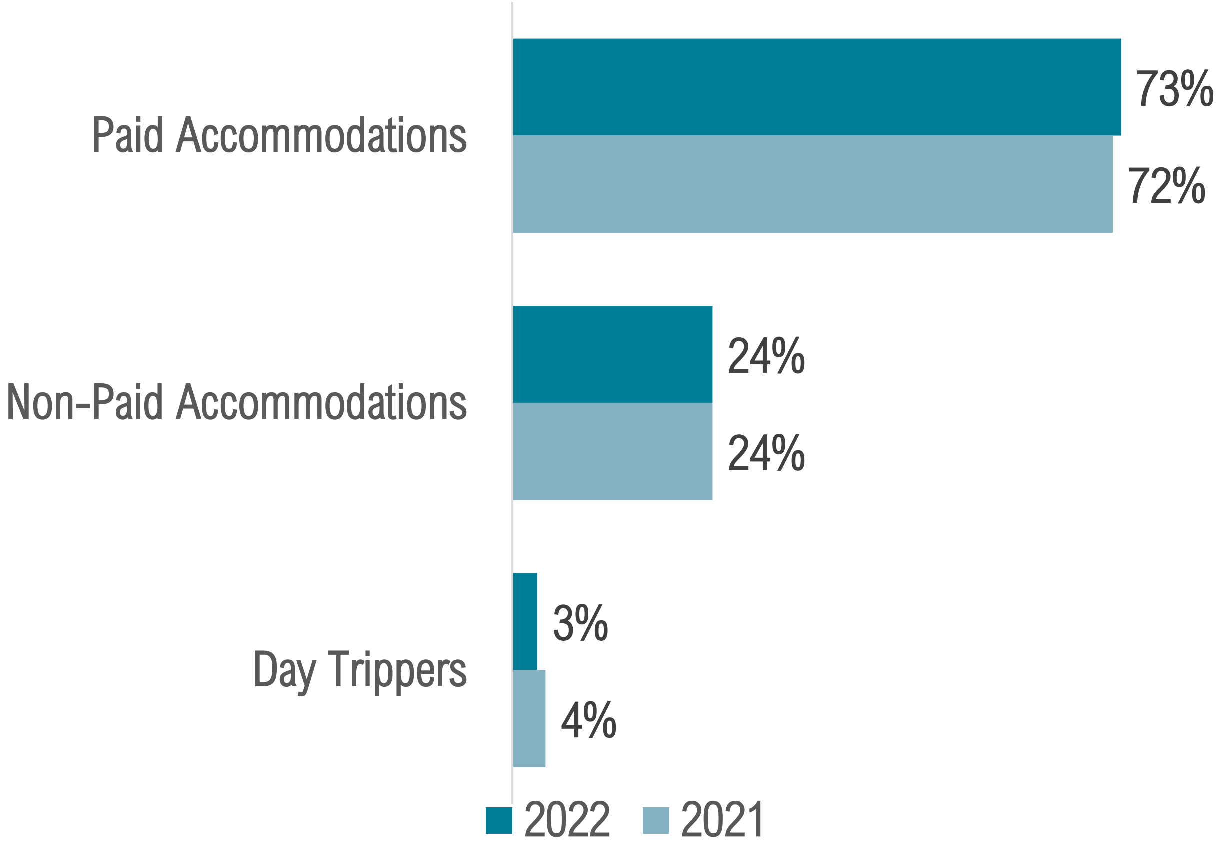
There were 1,477,100[1] visitors to the Fort Myers area in April – June 2022 (+12.8% from 2021).



[1]Sources: Visitor Tracking Study & Occupancy Survey

VISITOR TYPE

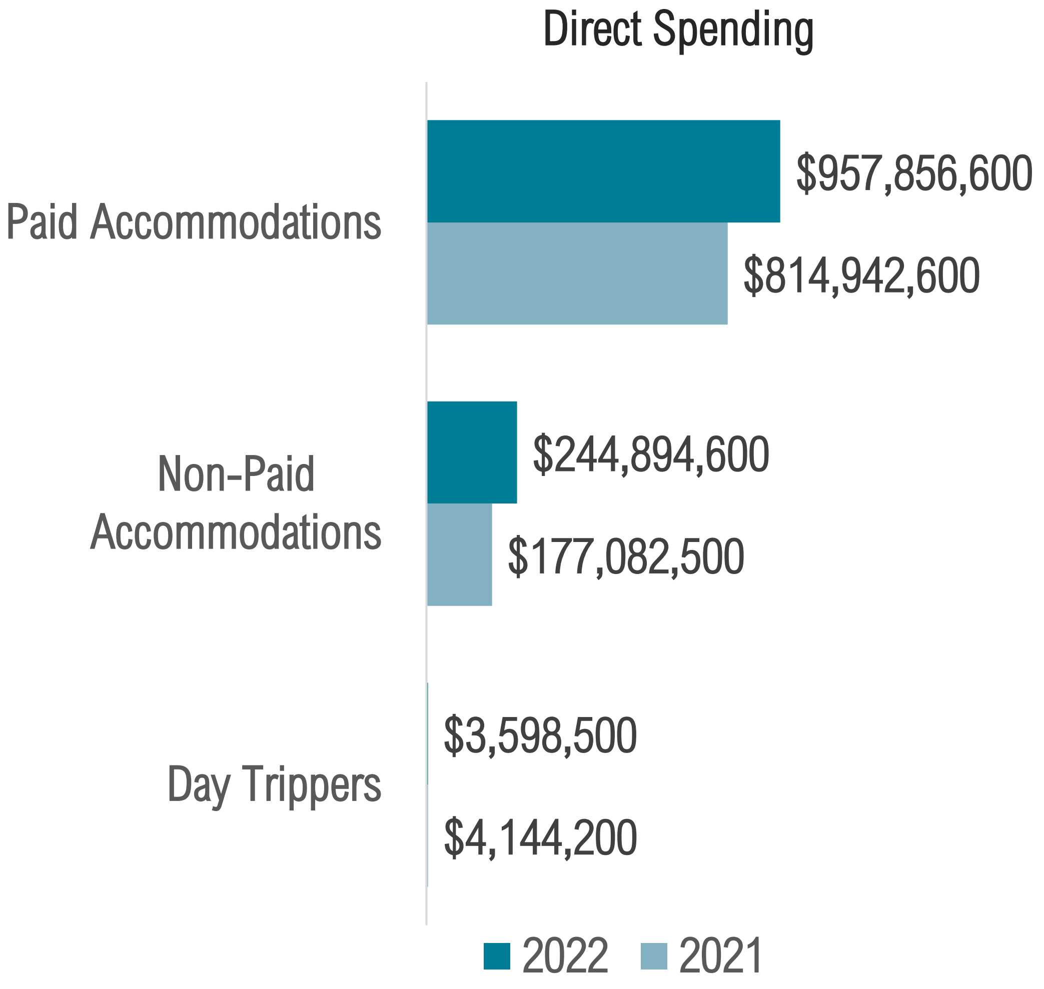
Visitors staying in paid accommodations accounted for nearly 3 in 4 visitors.



VISITOR EXPENDITURES BY VISITOR TYPE

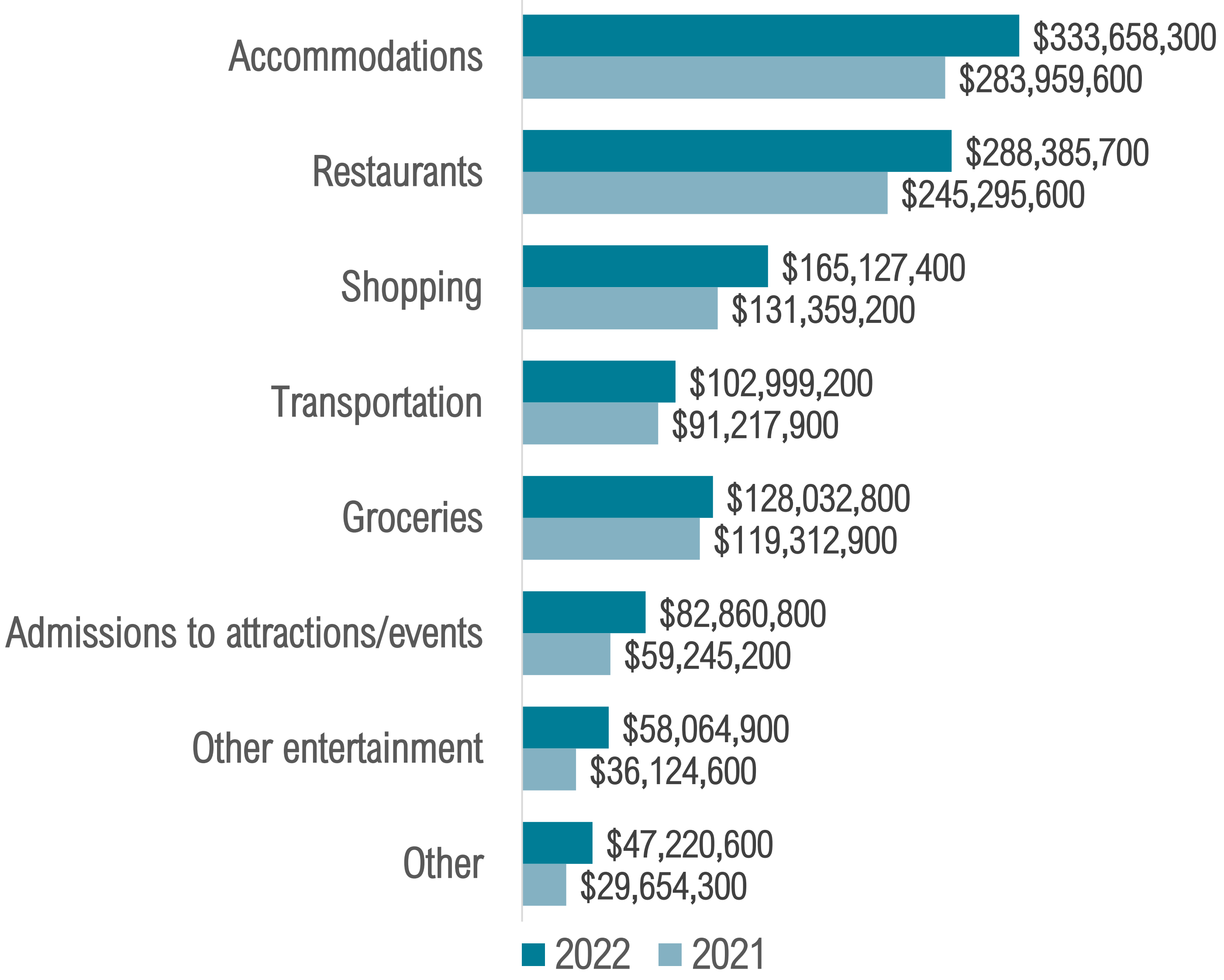
April – June visitors spent $1,206,349,700 in the Fort Myers area, resulting in a total economic impact of $1,921,715,100, up 21.1% from 2021.

Visitors staying in paid accommodations accounted for 73% of all visitors and 79% of all spending



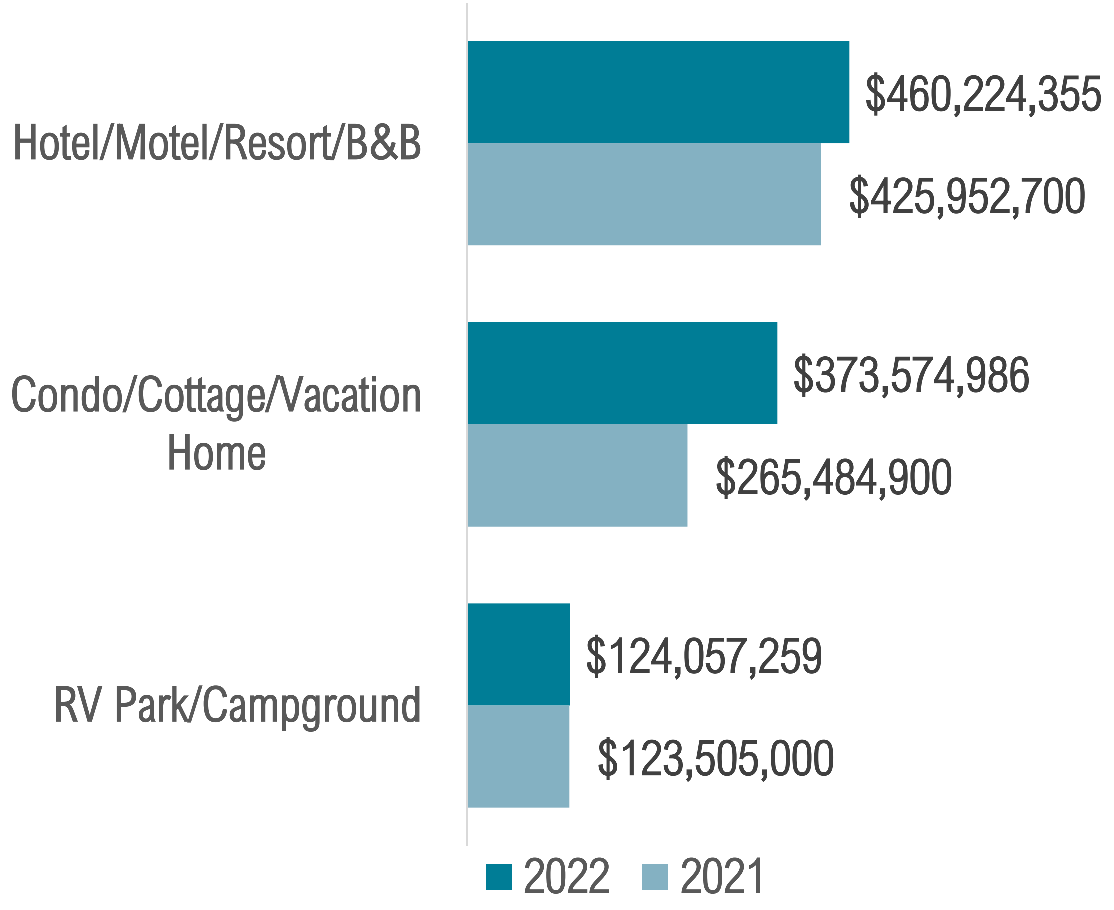
VISITOR EXPENDITURES BY SPENDING CATEGORY

Of the **$1,206,349,700** visitors spent in the Fort Myers area, 28% was spent on **accommodations** and 24% was spent on **restaurants**, accounting for **52% of all visitor spending**.



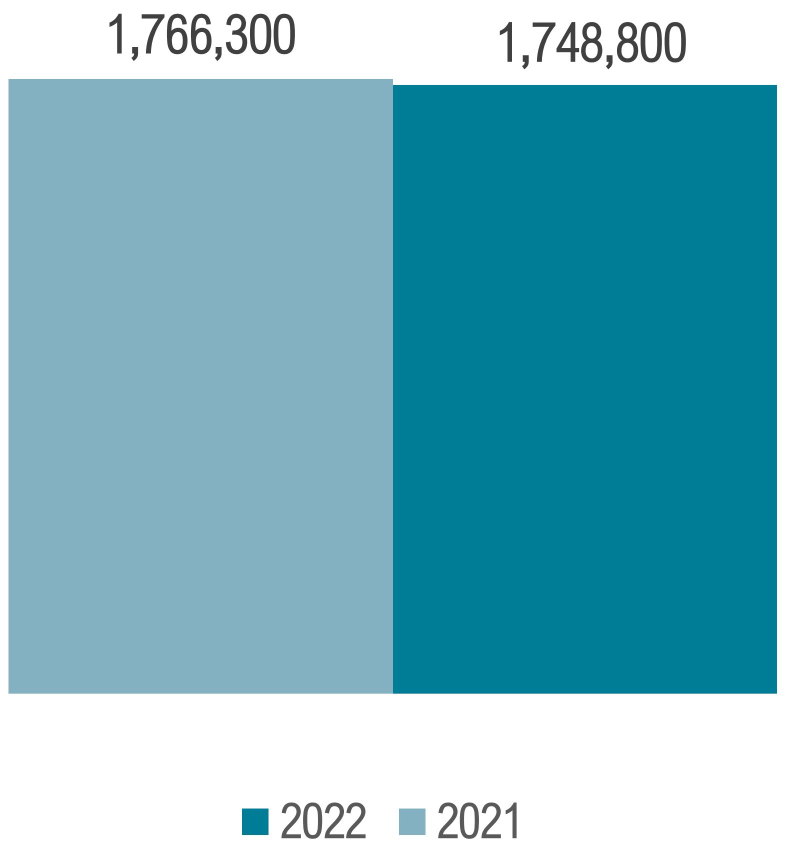
VISITOR EXPENDITURES BY LODGING TYPE

April – June visitors staying in paid accommodations spent **$957,856,600** in the Fort Myers area.



ROOM NIGHTS GENERATED

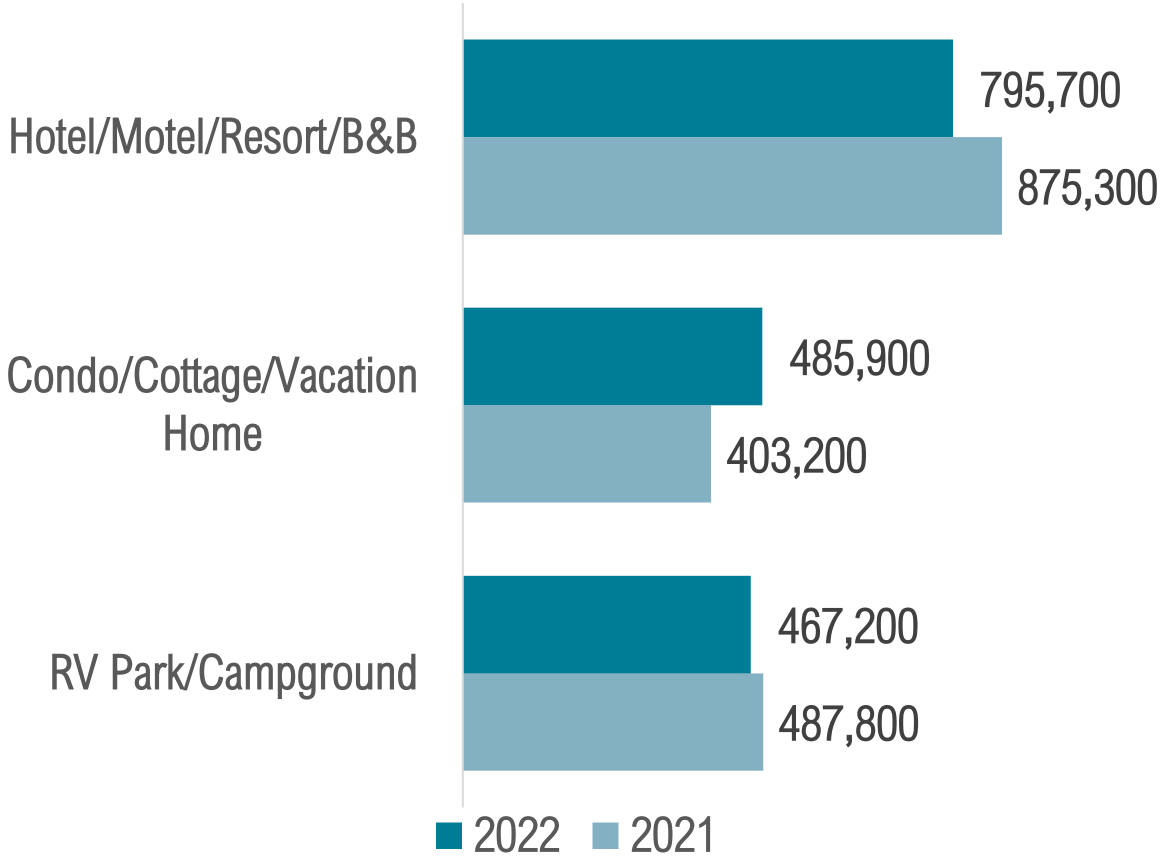
April – June visitors spent 1,748,800[1] nights in Fort Myers area hotels, resorts, condos, rental houses, etc. (-1.0% from 2021).



[1]Source: Occupancy Survey

ROOM NIGHTS GENERATED

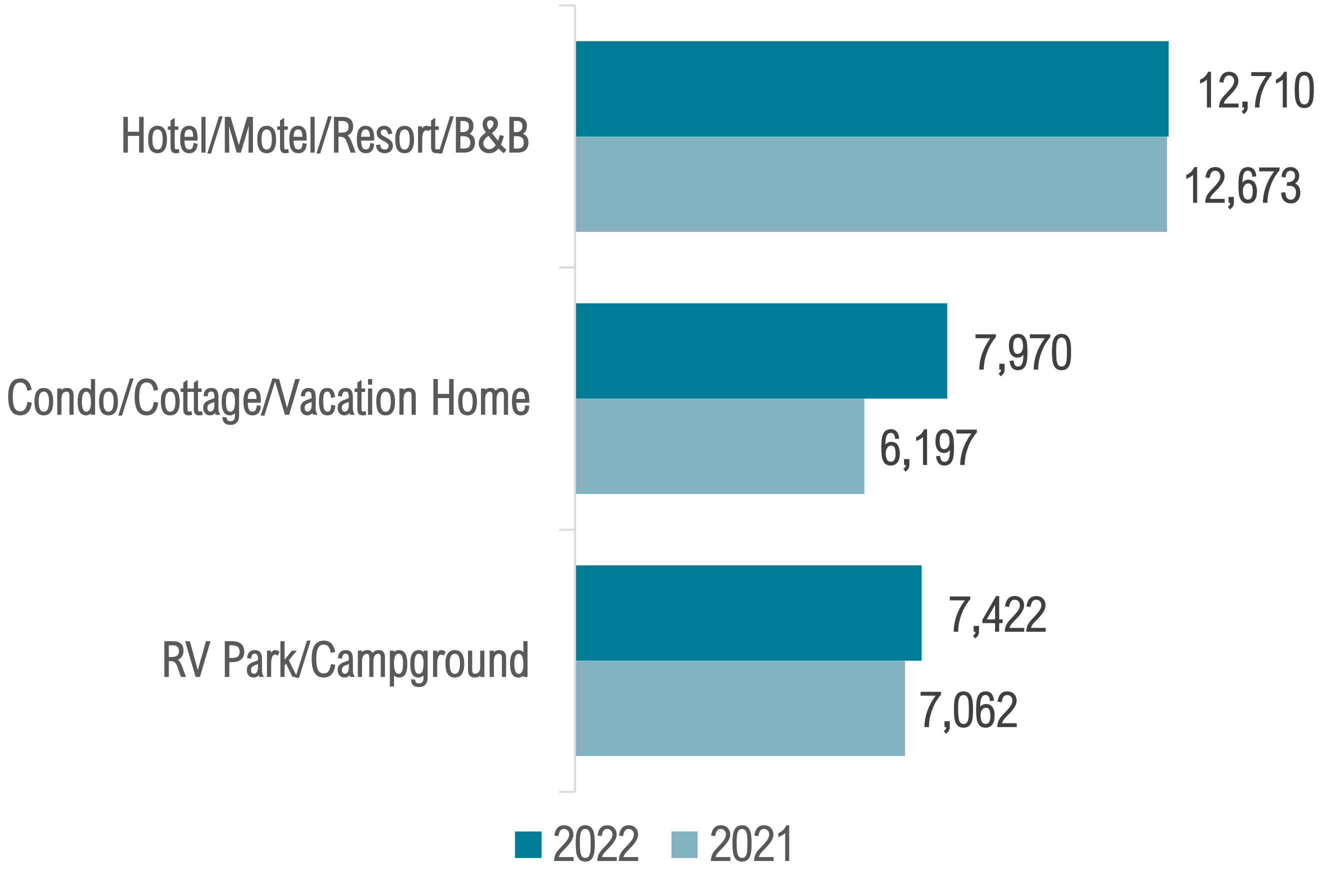
Motels, hotels, etc. accounted for over **2 in 5** nights in the Fort Myers area, while vacation rentals accounted for nearly **3 in 10** nights visitors spent in the area.



[1]Source: Occupancy Survey

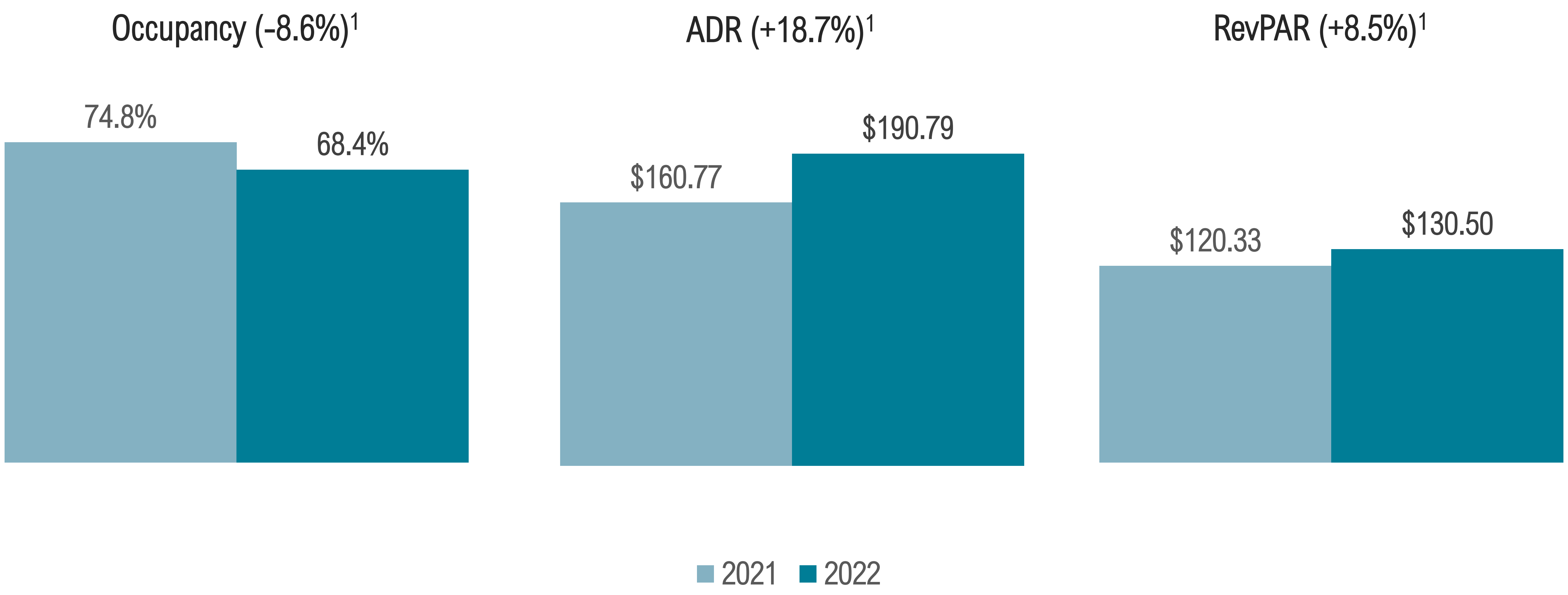
AVAILABLE UNITS

There were 28,102[1] available units in April – June 2022 vs. 25,932 in 2021 (+8.4%). Nearly half of the units were hotels, motels, etc.



[1]Source: Occupancy Survey

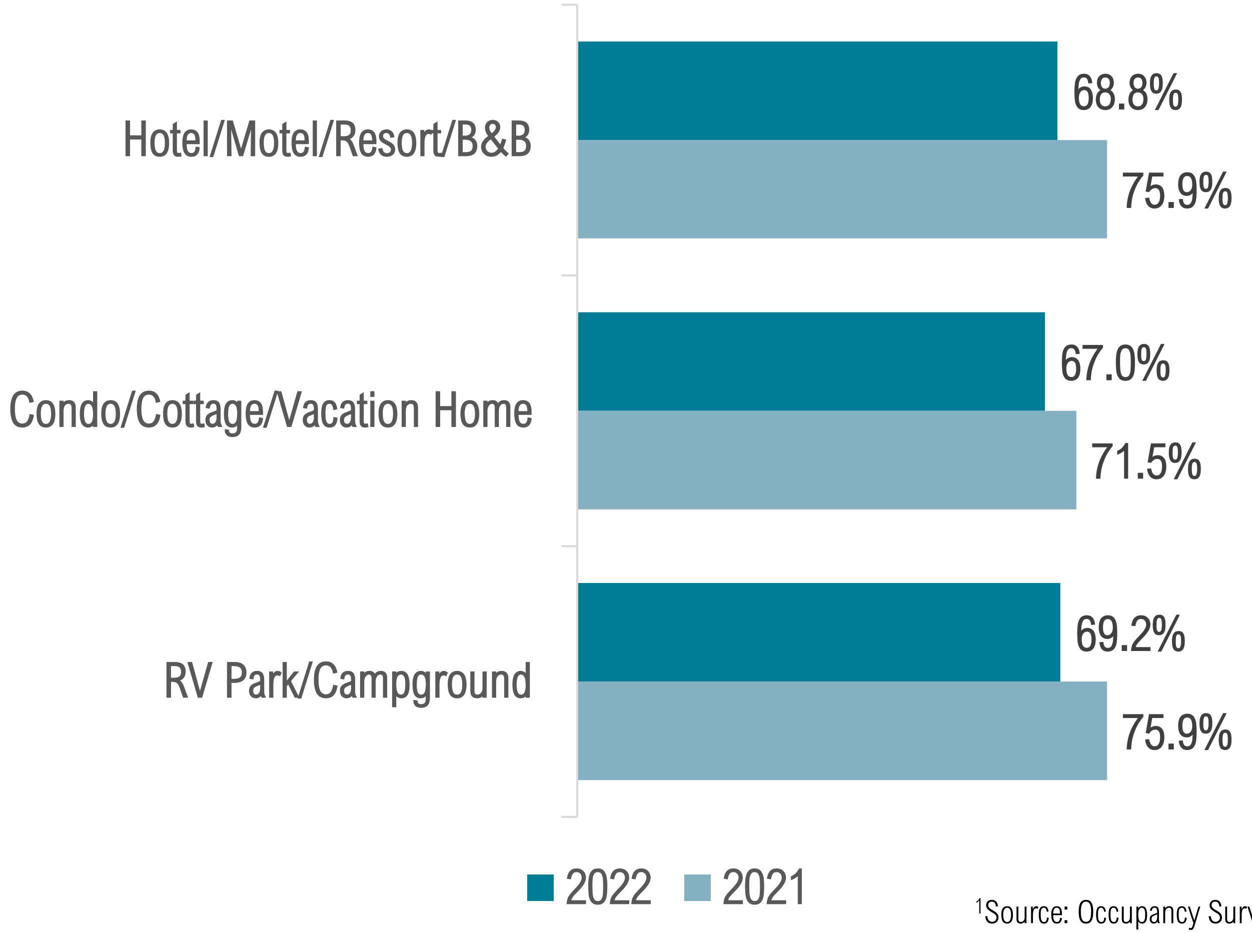
OCCUPANCY, ADR AND REVPAR



[1]Source: Occupancy Survey

OCCUPANCY

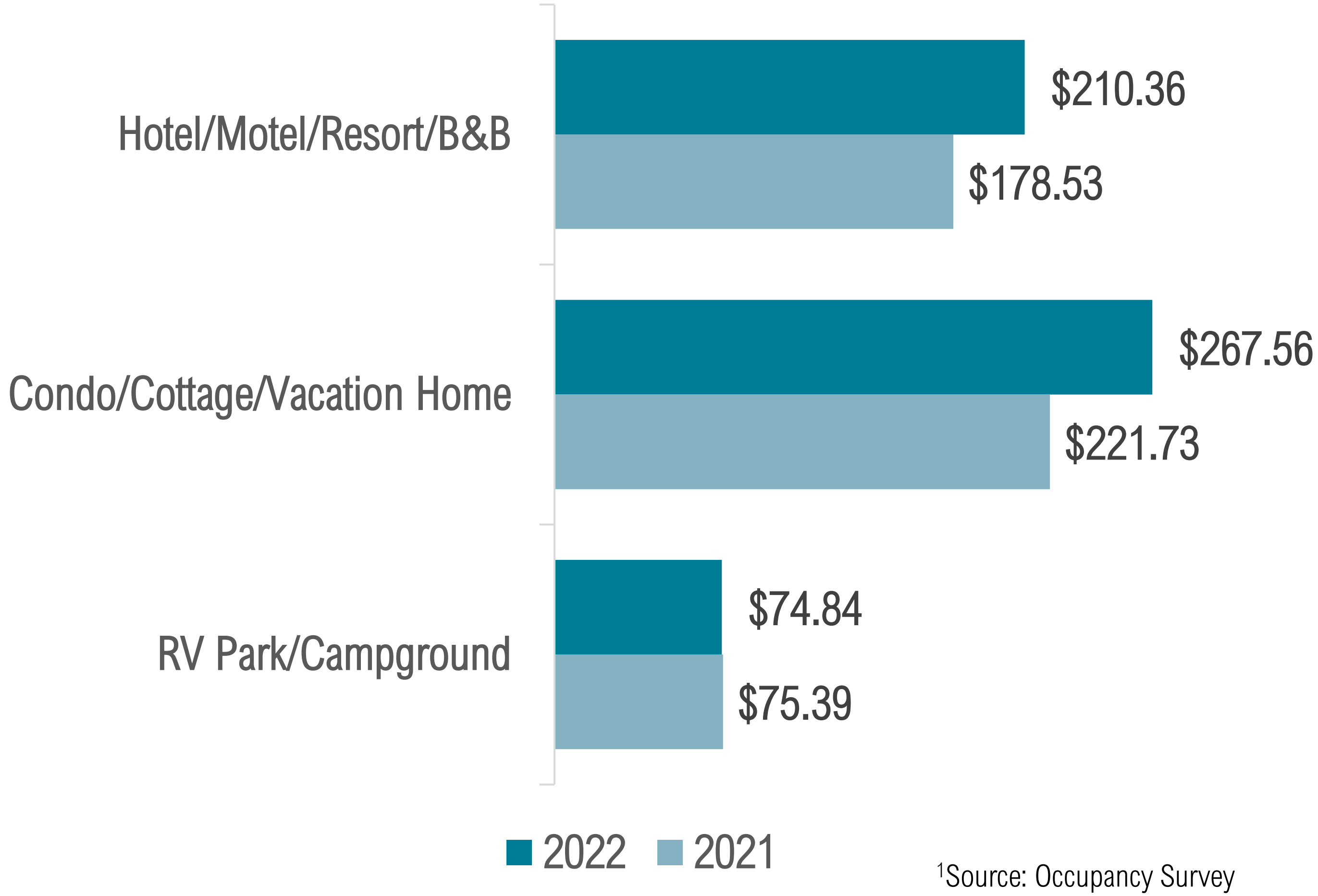
Average occupancy in April – June was 68.4%[1] (74.8% in 2021).



[1]Source: Occupancy Survey

ADR

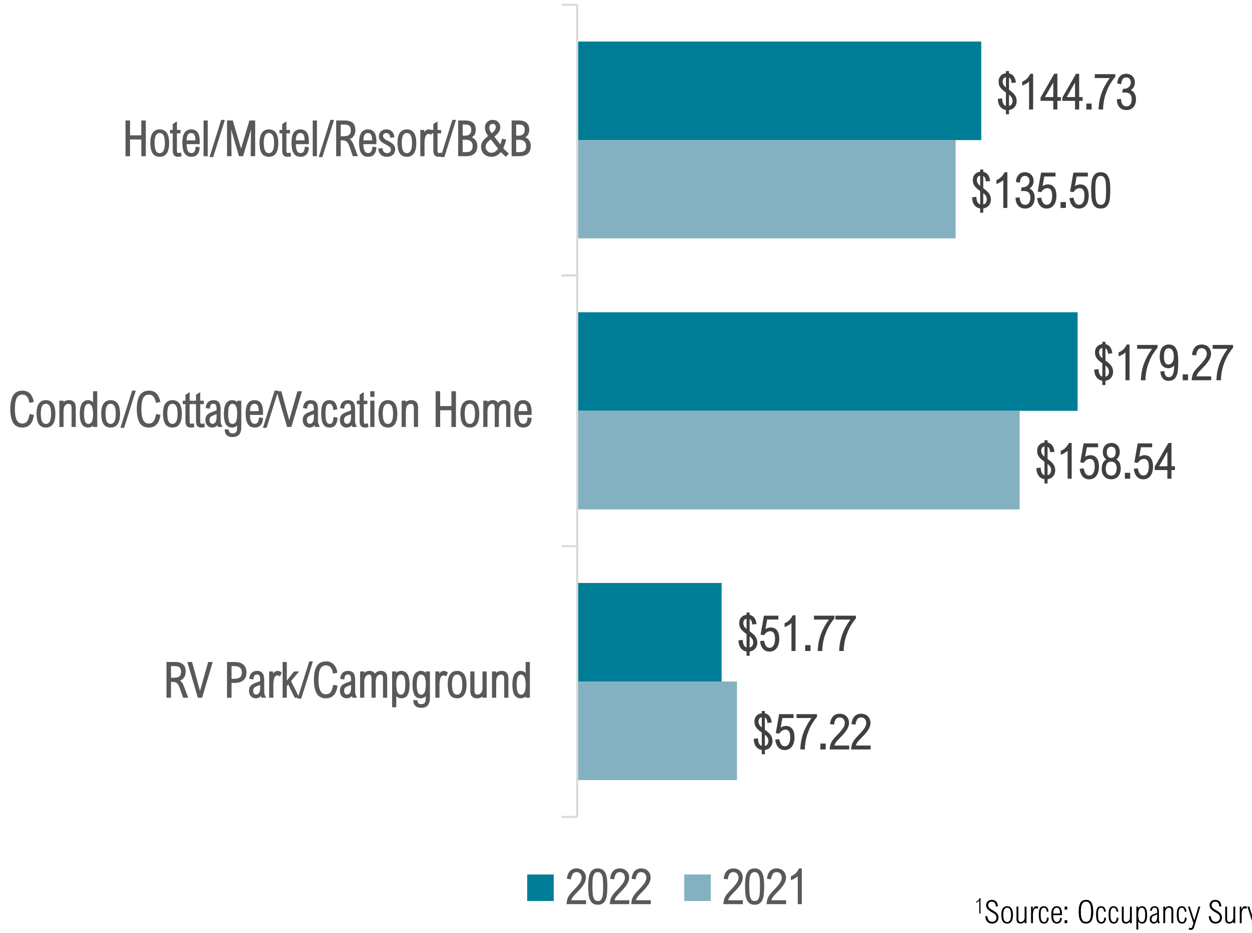
ADR in April – June was $190.79[1] ($160.77 in 2021).



[1]Source: Occupancy Survey

REVPAR

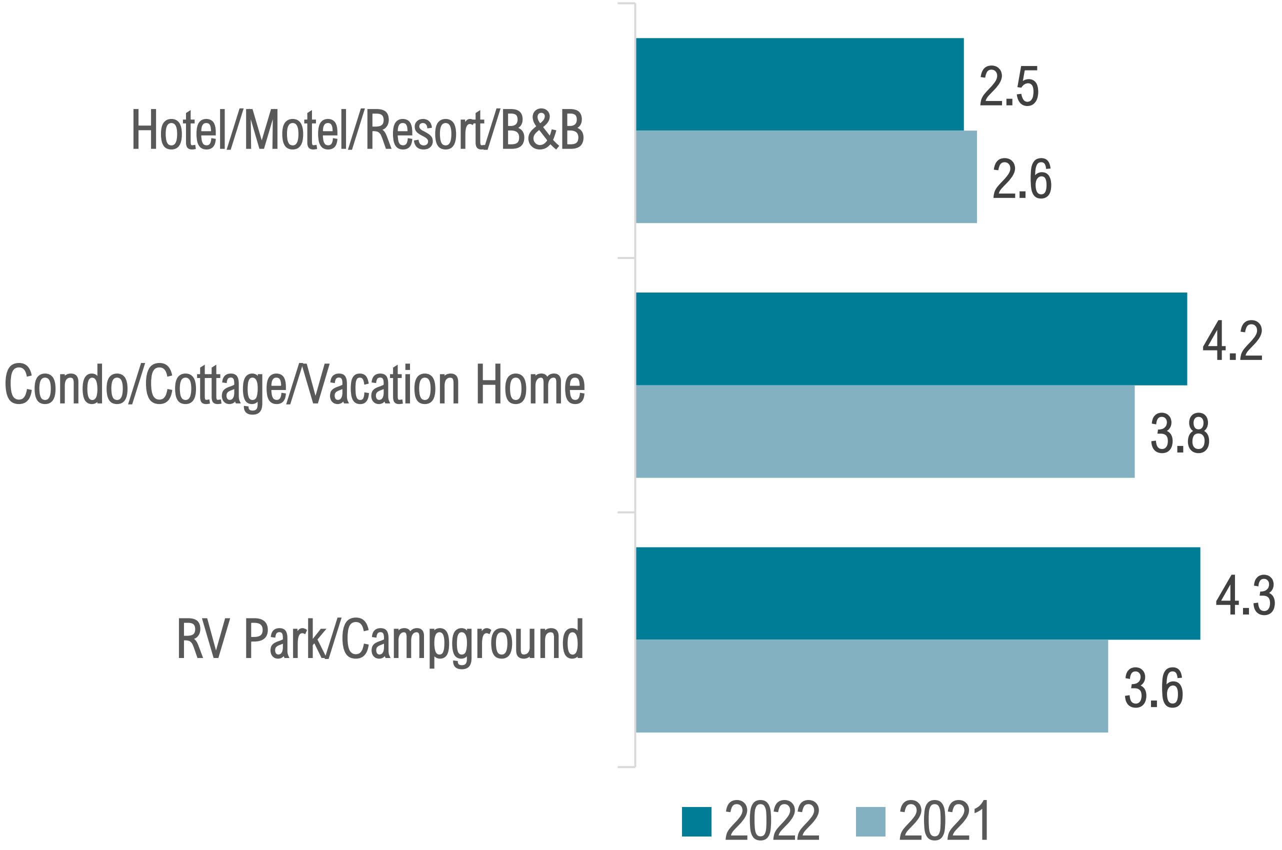
Average RevPAR in April – June was $130.50 ($120.33 in 2021).



Source: Occupancy Survey[1]

TRAVEL PARTY SIZE

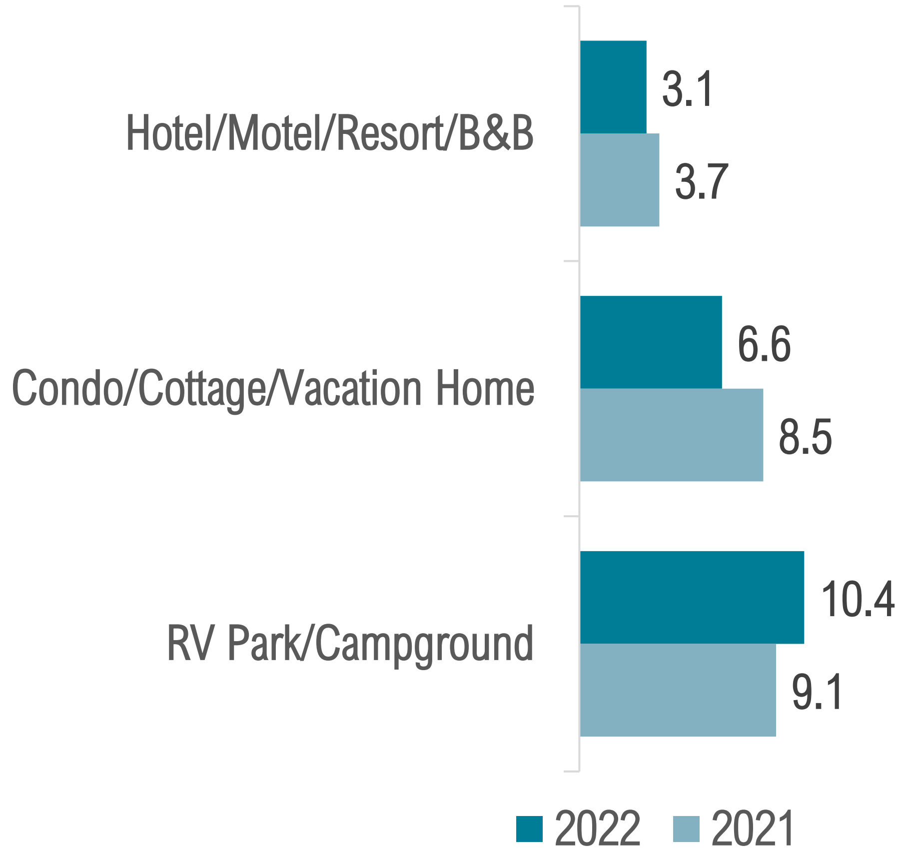
For visitors in paid accommodations, average travel party size in April – June was **3.3 people**[1] (3.0 people in 2021).



[1]Source: Occupancy Survey

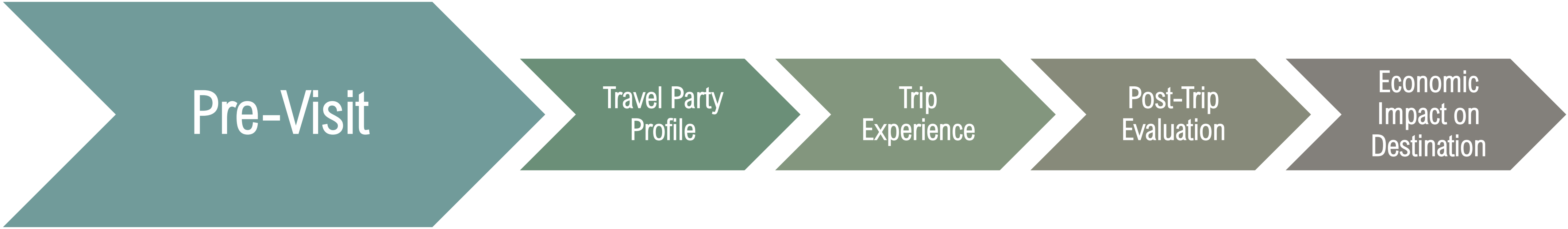
LENGTH OF STAY

For visitors in paid accommodations, average length of stay in April – June was **5.3 nights**[1] (5.6 nights in 2021).



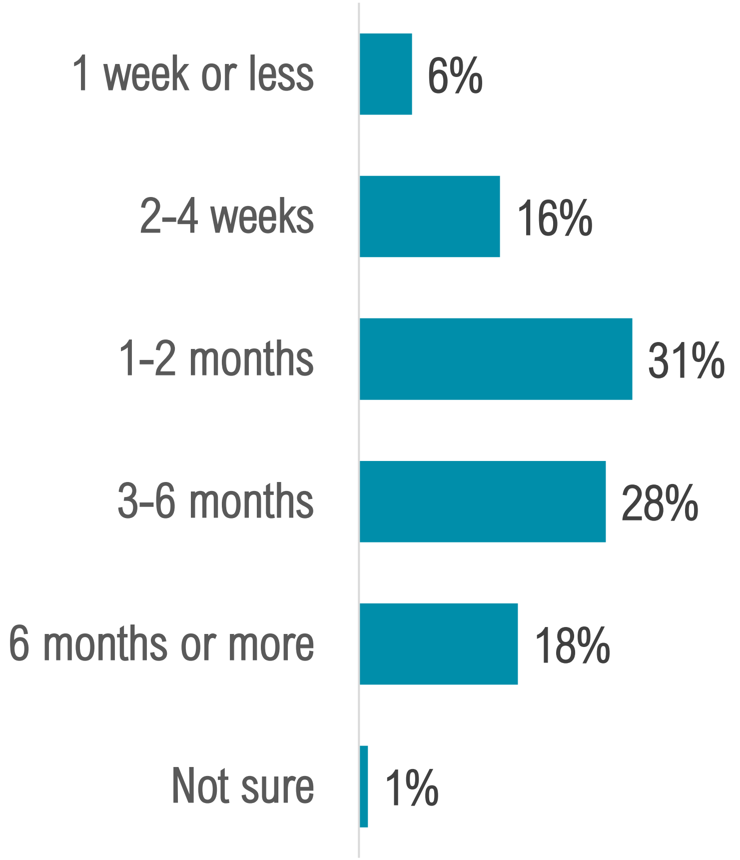
[1]Source: Occupancy Survey

Visitor Journey: Pre-Visit



TRIP PLANNING CYCLE

Over **half** of visitors planned their trip **less than 3 months** in advance, while nearly **1 in 5** planned their trip **more than 6 months** in advance.

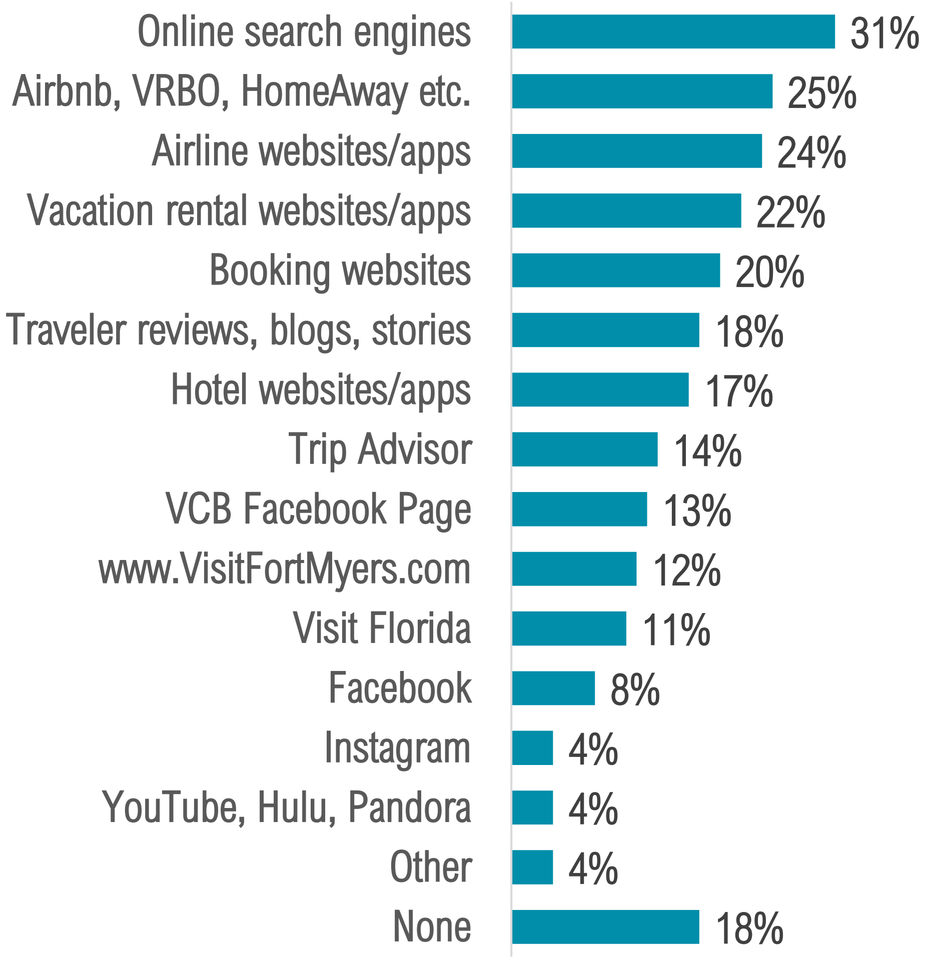


TRIP PLANNING: WEBSITES/APPS USED[1]

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

Visitors were most likely to use **online search engines** to plan their trips.

1 in 4 visitors used **Airbnb, VRBO, HomeAway, or similar websites** to plan their trips.



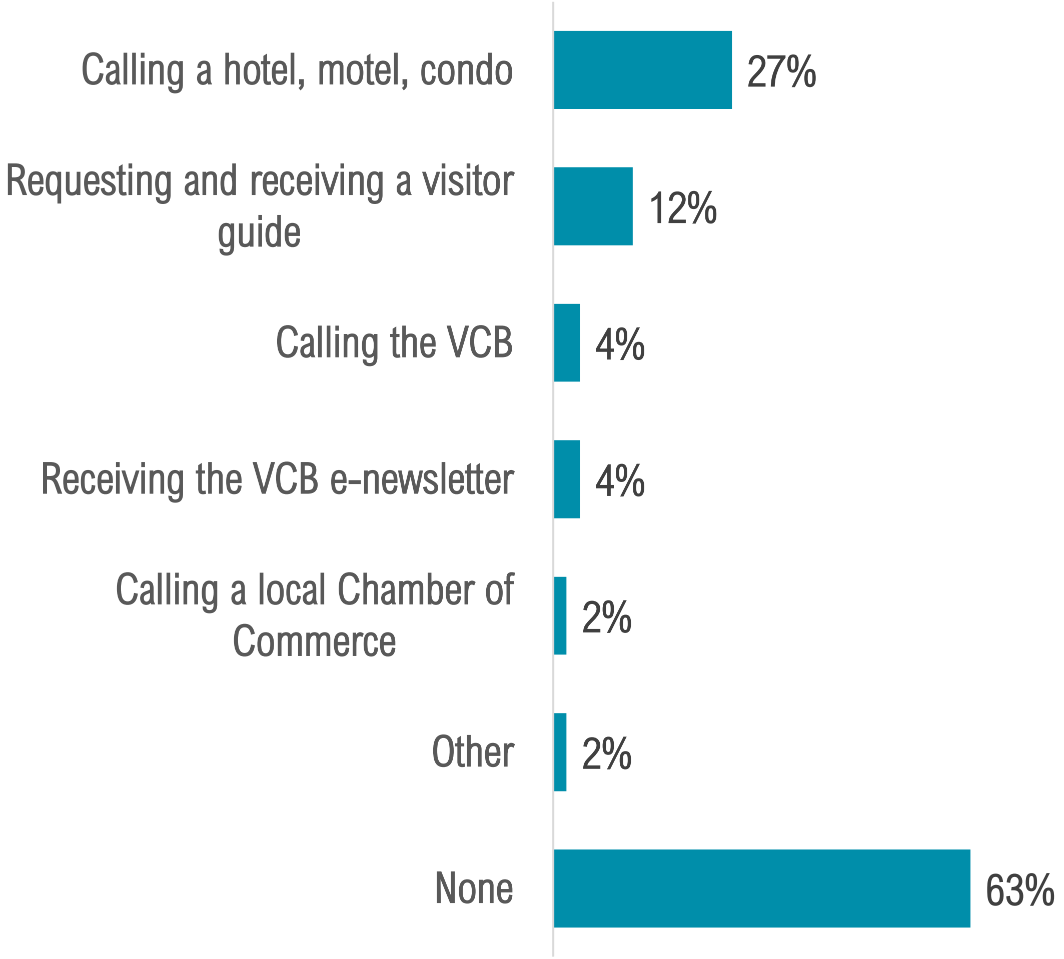
[1]Multiple responses permitted.

TRIP PLANNING: INFORMATION REQUESTS[1]

Nearly **2 in 5** visitors made **information requests** while planning their trip to the Fort Myers area.

Visitors who sought information prior to their trips were most likely to rely on **hotels, motels, or condos.**

The number of visitors requesting information in Q2 2022 remained level with Q2 2021.



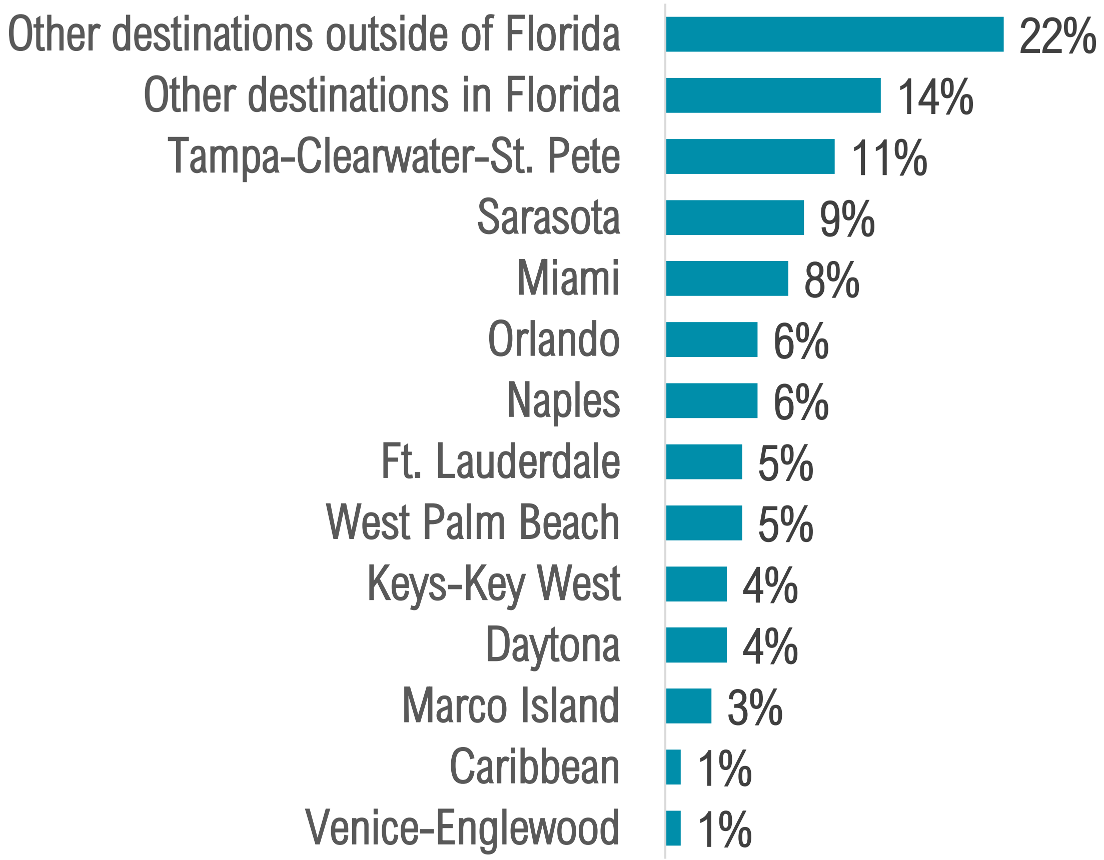
[1]Multiple responses permitted.

TRIP PLANNING: OTHER DESTINATIONS CONSIDERED

29% of visitors considered choosing other destinations when planning their trips.

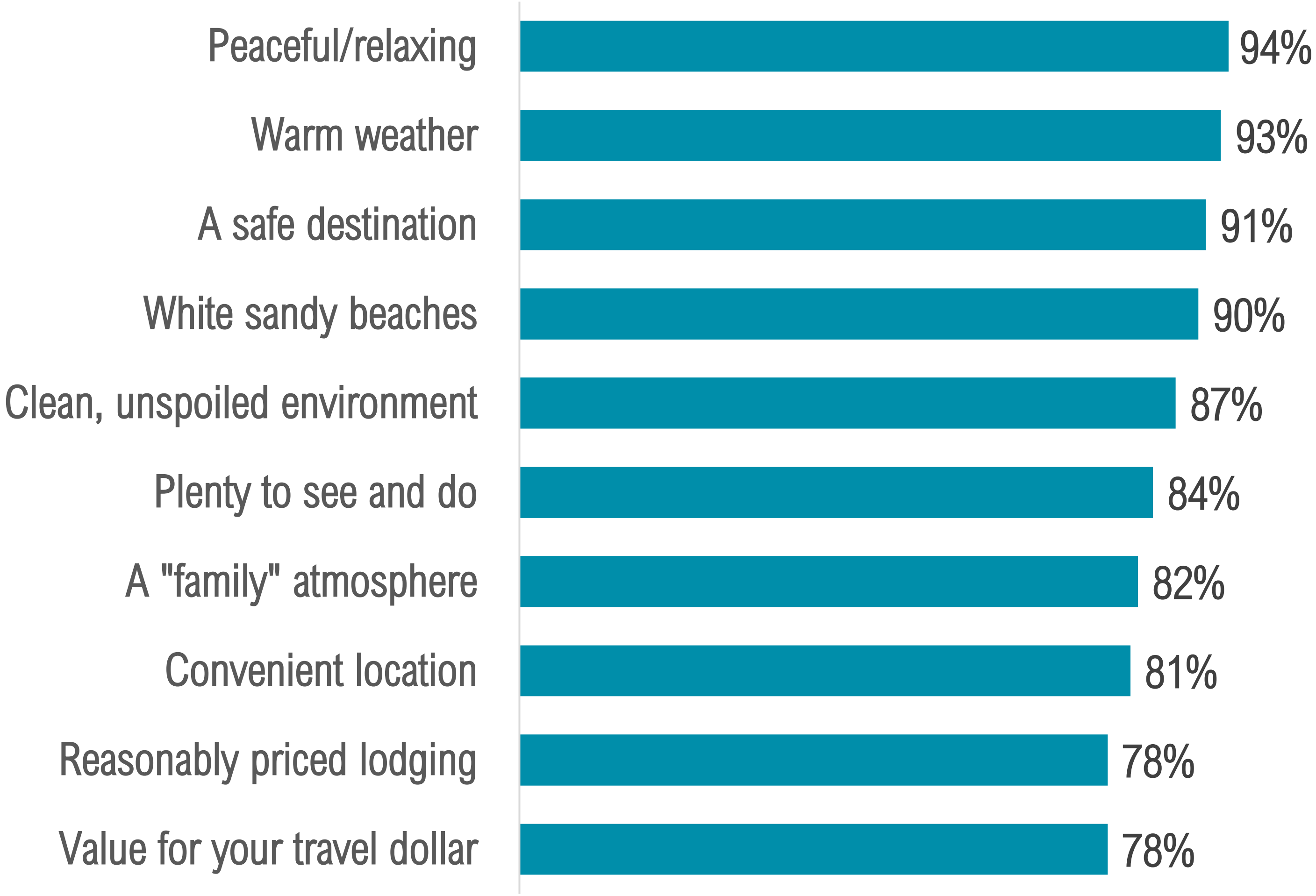
More than 1 in 5 visitors considered destinations outside of Florida.

BASE: 29% of visitors who considered other destinations



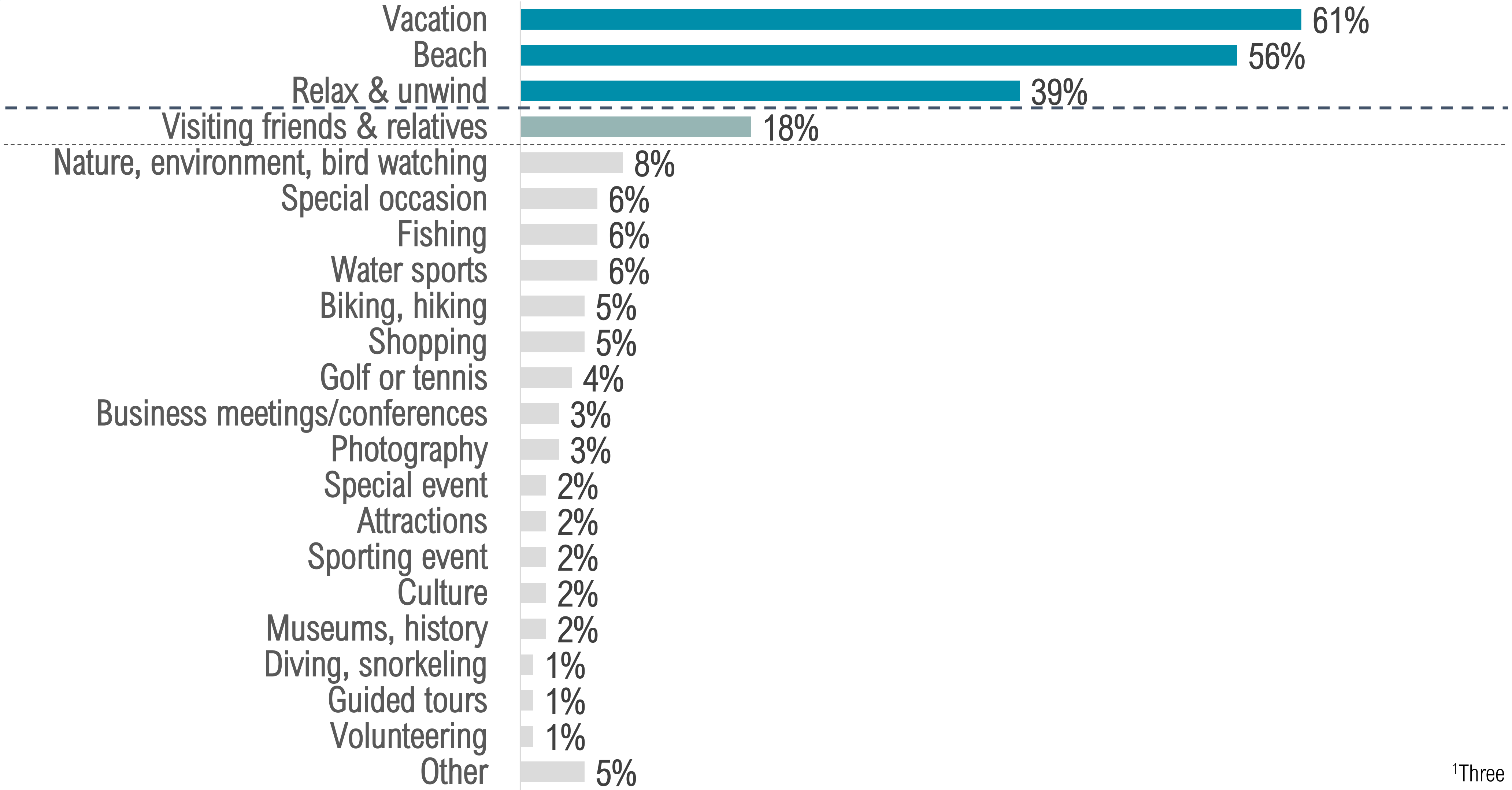
TRIP INFLUENCERS[1]

At least **9 in 10** visitors were heavily influenced by the Fort Myers area being **peaceful** and **warm** when thinking about visiting.



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

REASON FOR VISITING[1]



[1]Three responses permitted.

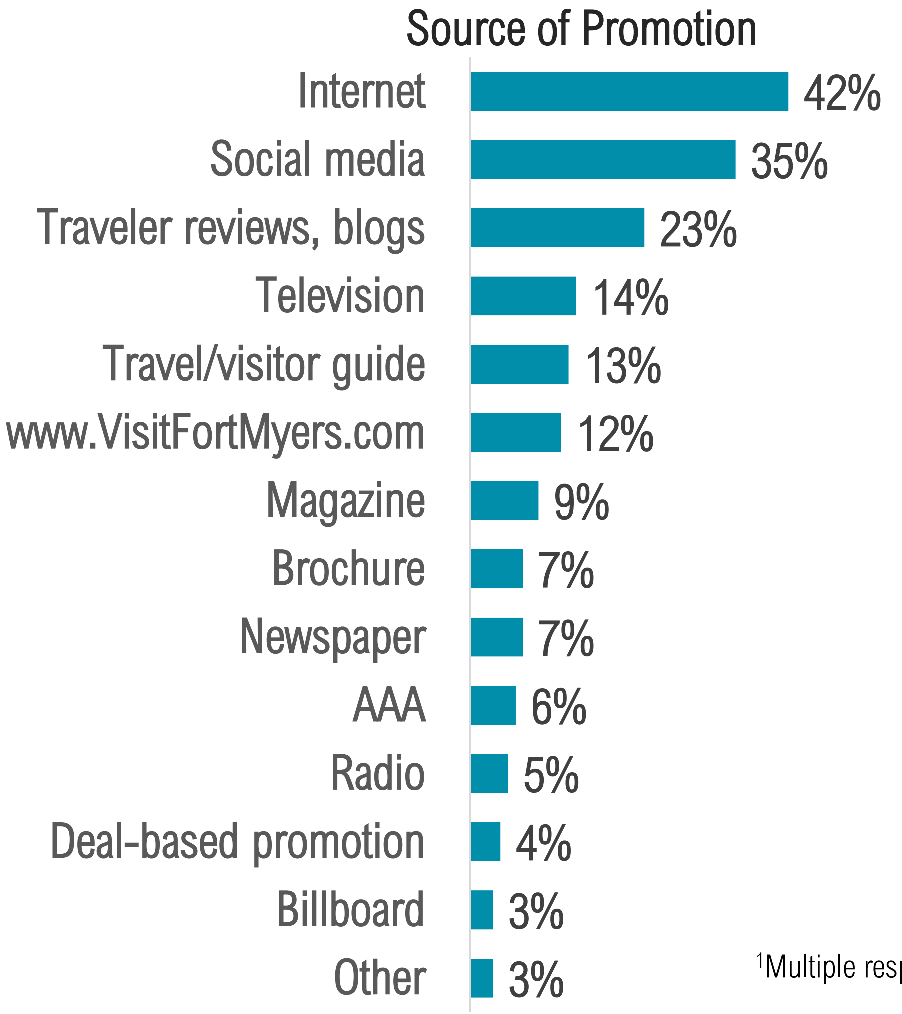
Pre-Visit
April – June 2022

PROMOTIONS[1]

45% of visitors **recalled promotions** in the past 6 months for the Fort Myers area.

This influenced **24%** of all visitors to come to the Fort Myers area.

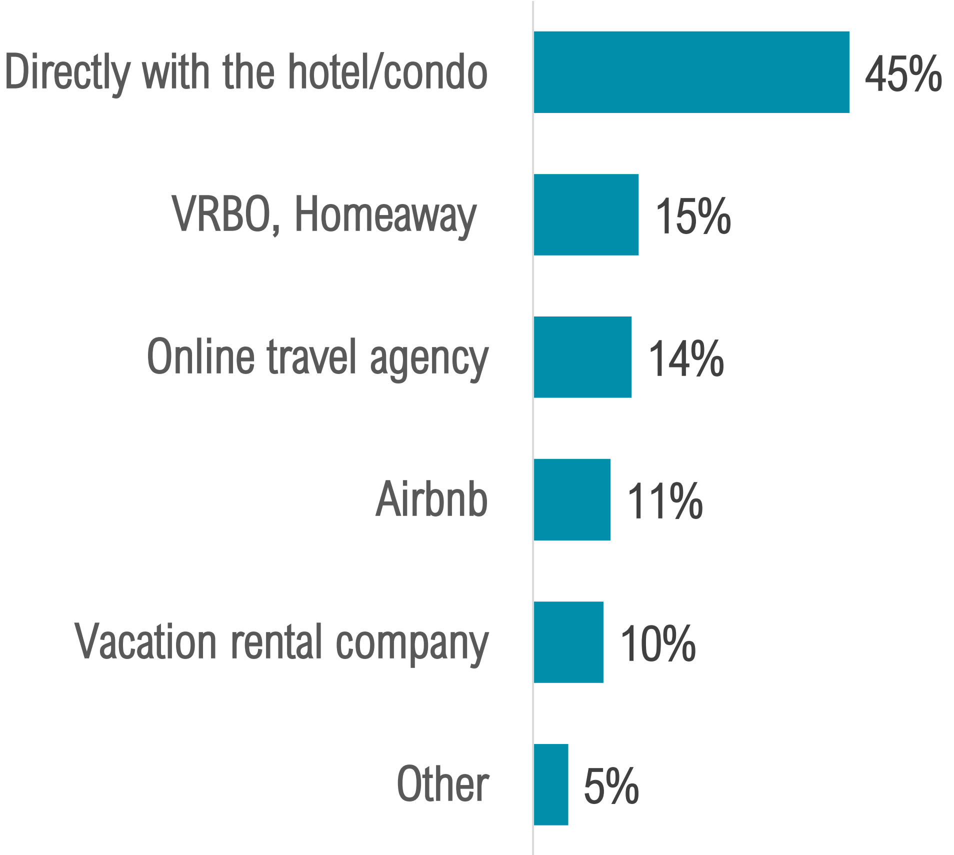
BASE: 45% of visitors who recalled promotions



[1]Multiple responses permitted.

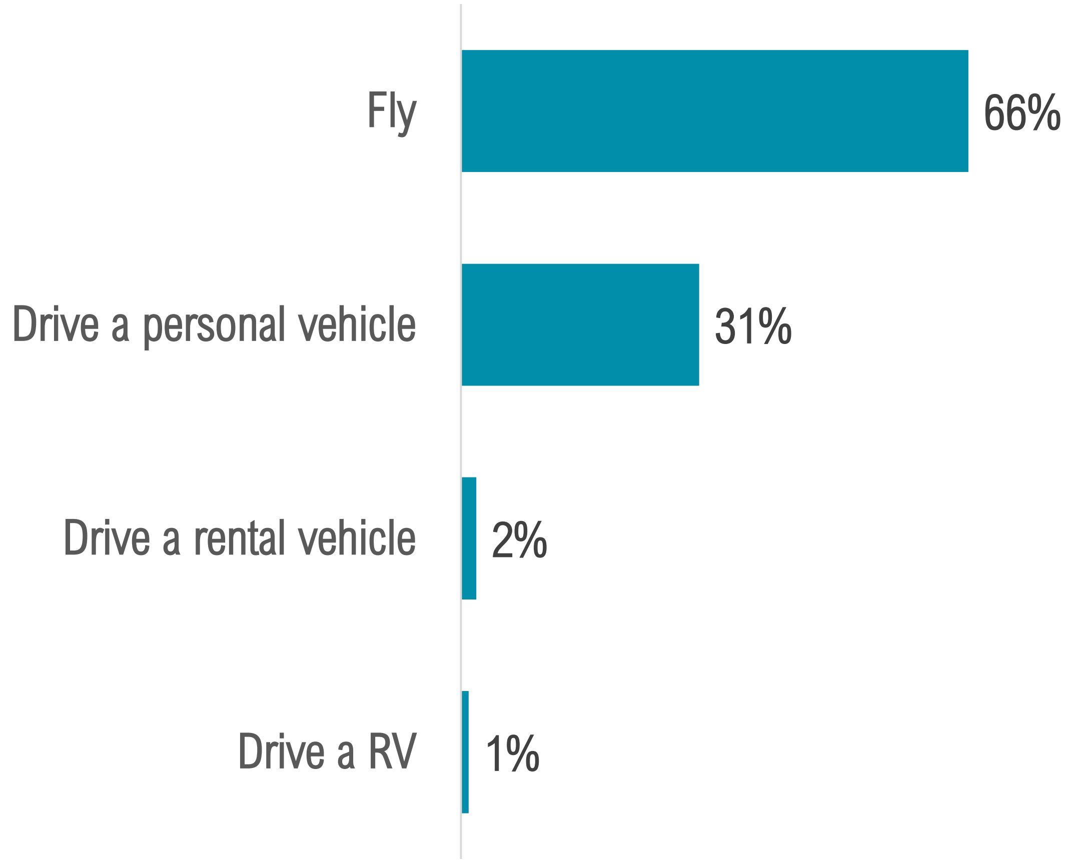
BOOKING

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



TRANSPORTATION

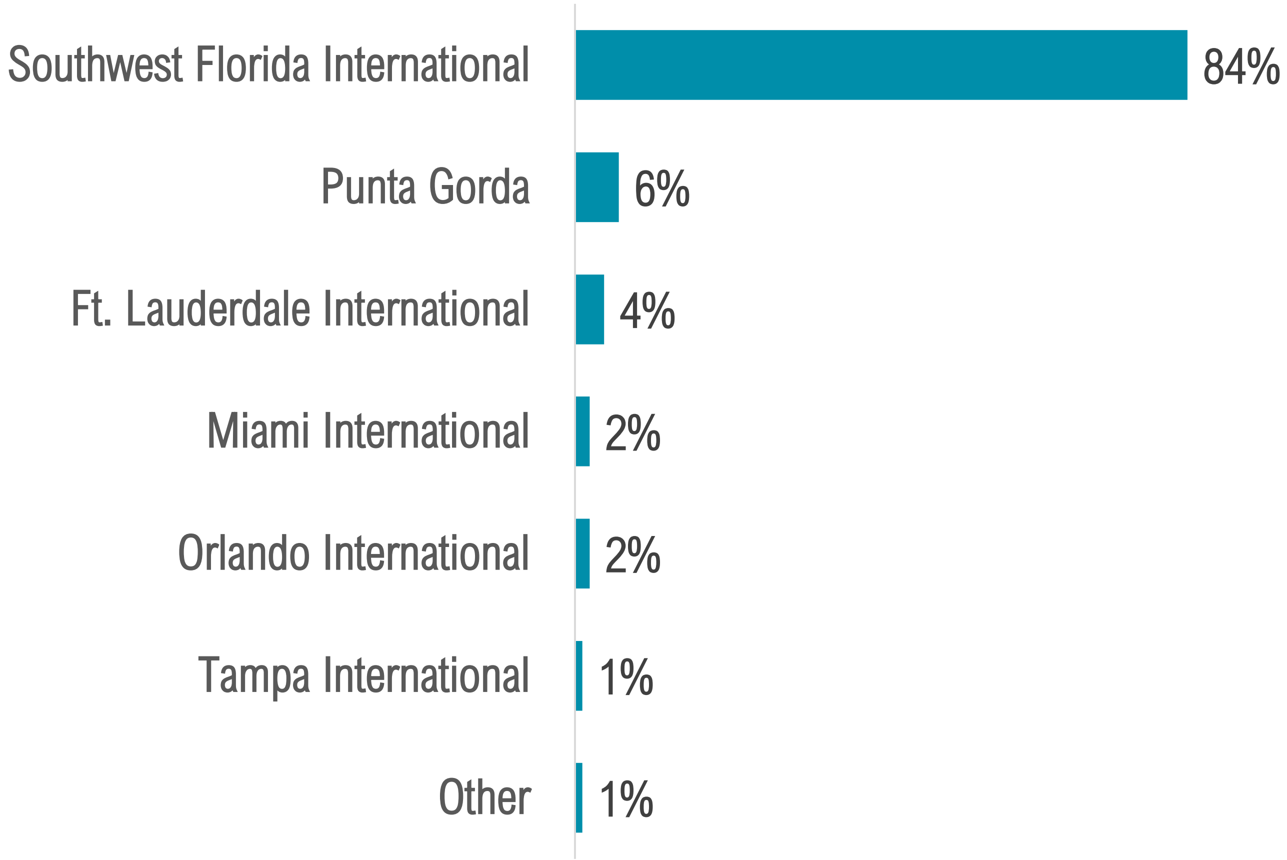
2 in 3 visitors **flew** to the Fort Myers area.



AIRPORT

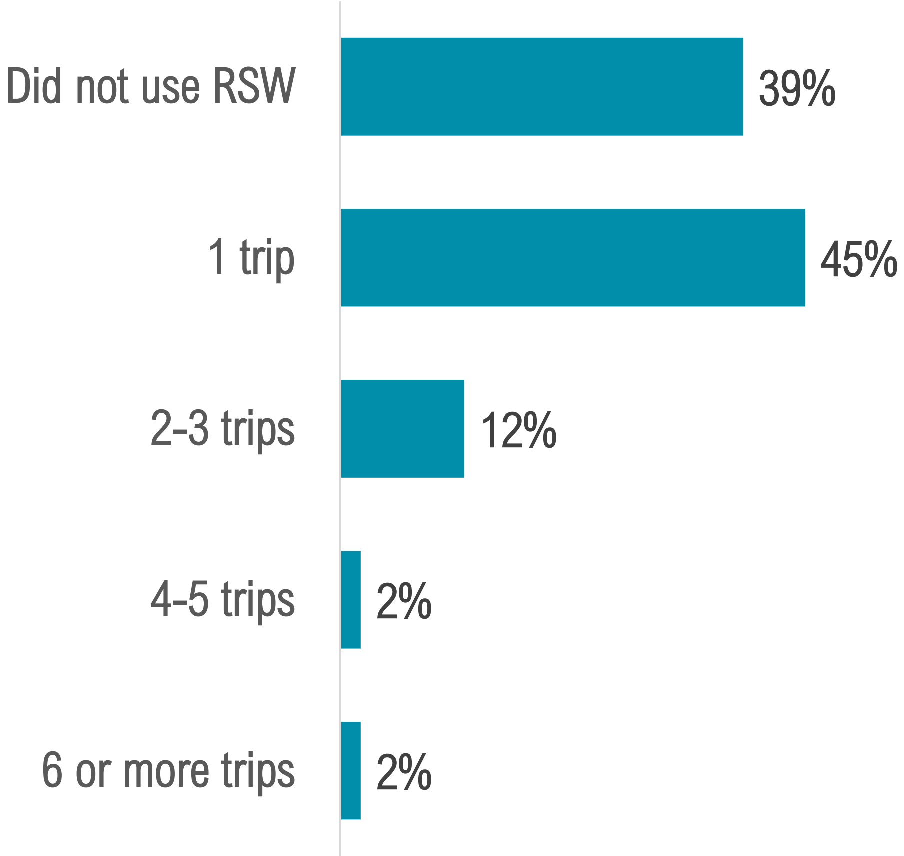
Over 4 in 5 visitors who flew to the Fort Myers area came through RSW.

BASE: 66% of visitors who flew

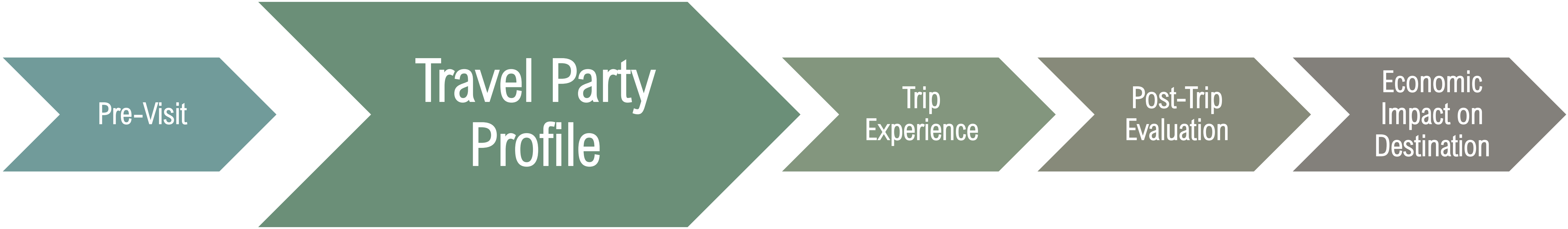


USE OF RSW IN THE PAST YEAR

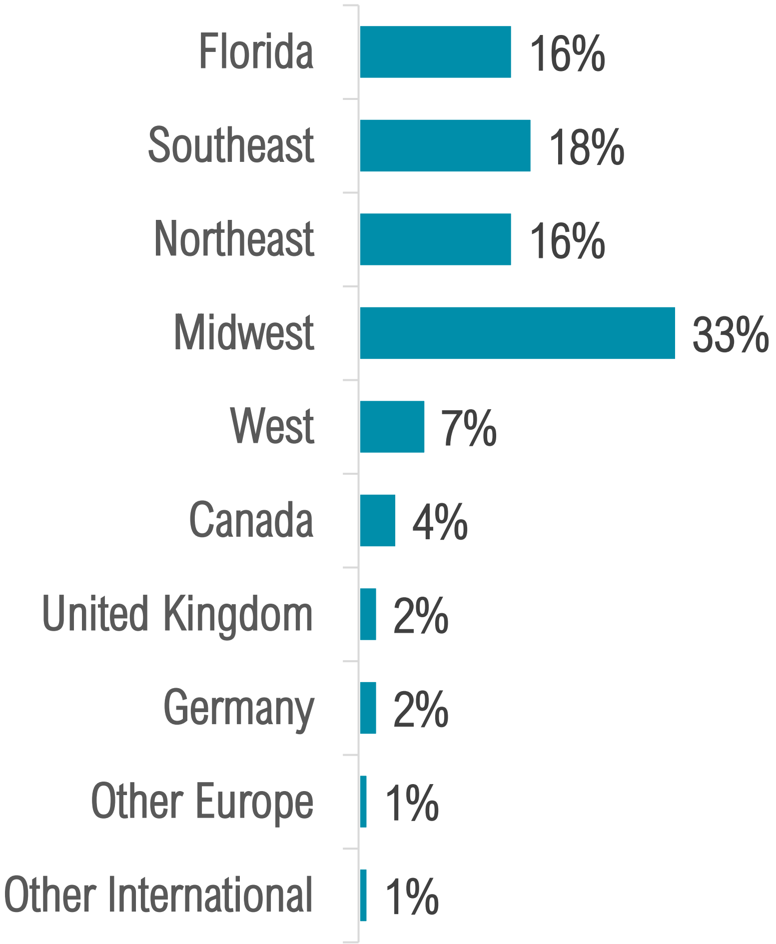
61% of visitors used RSW at least once in the past year.

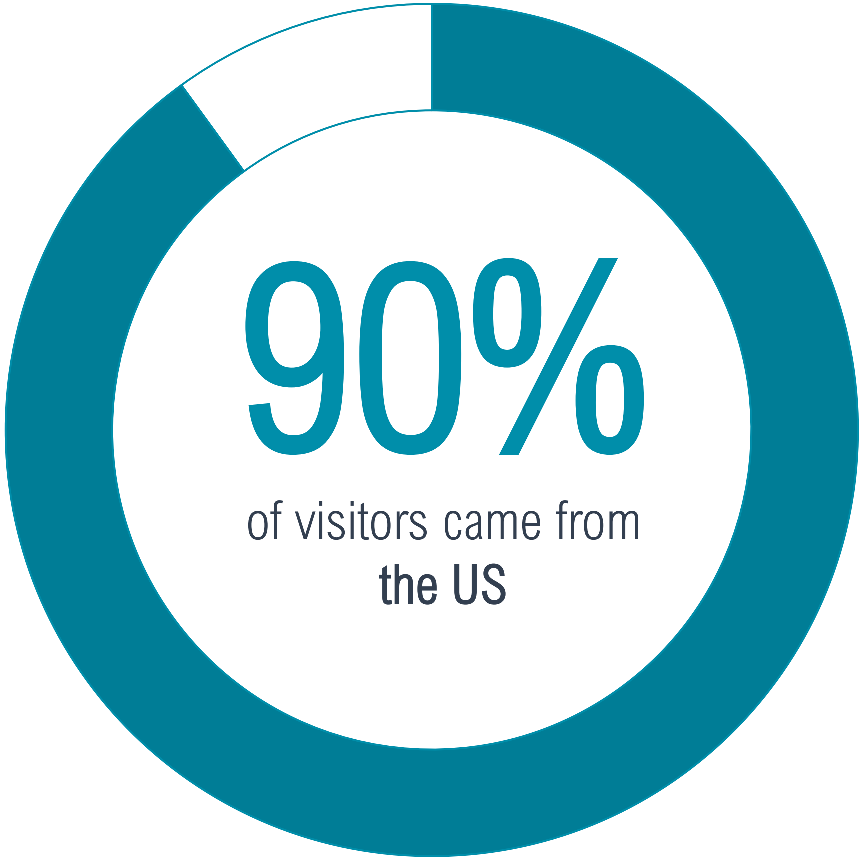


VISITOR JOURNEY: TRAVEL PARTY PROFILE



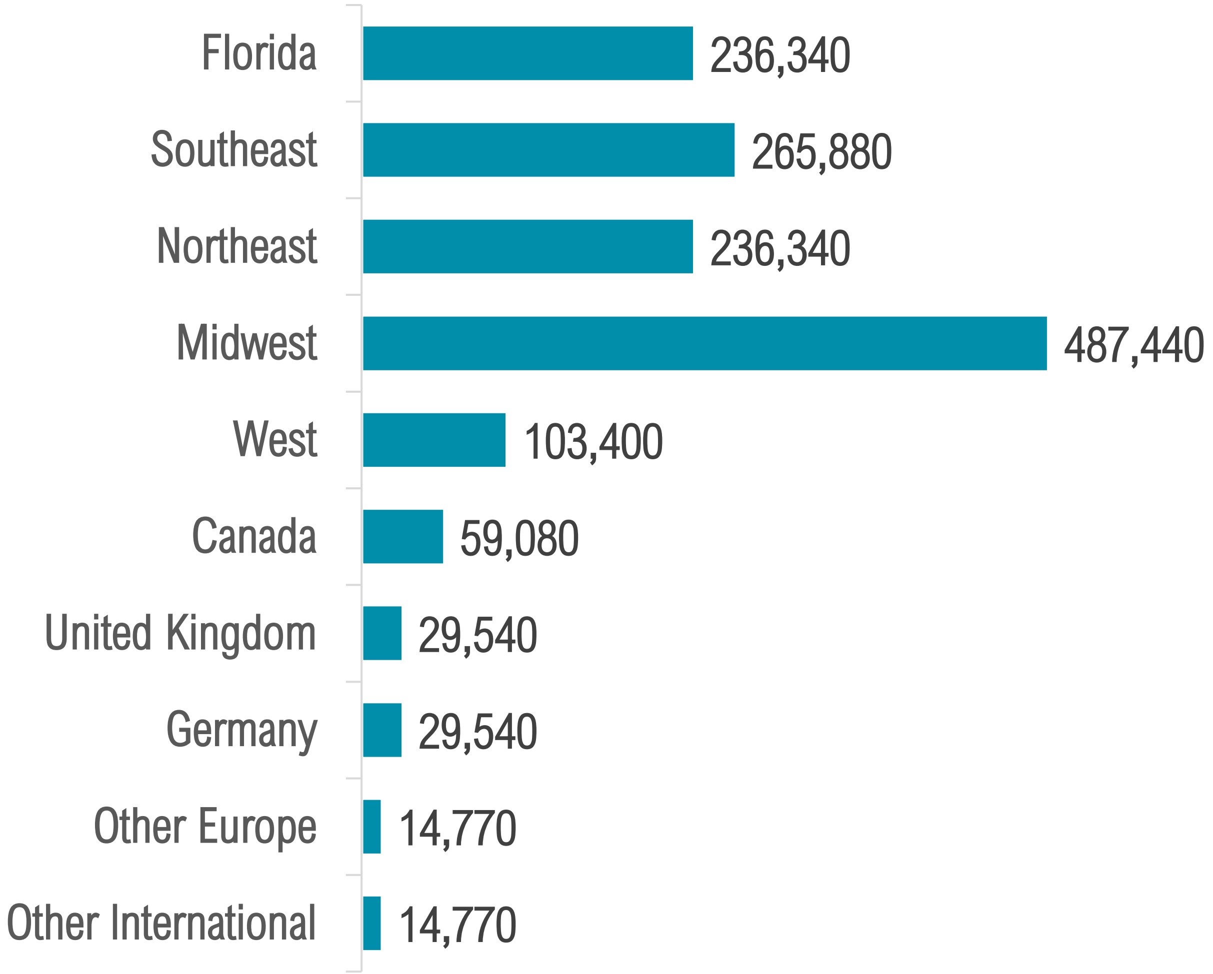
ORIGIN[1]





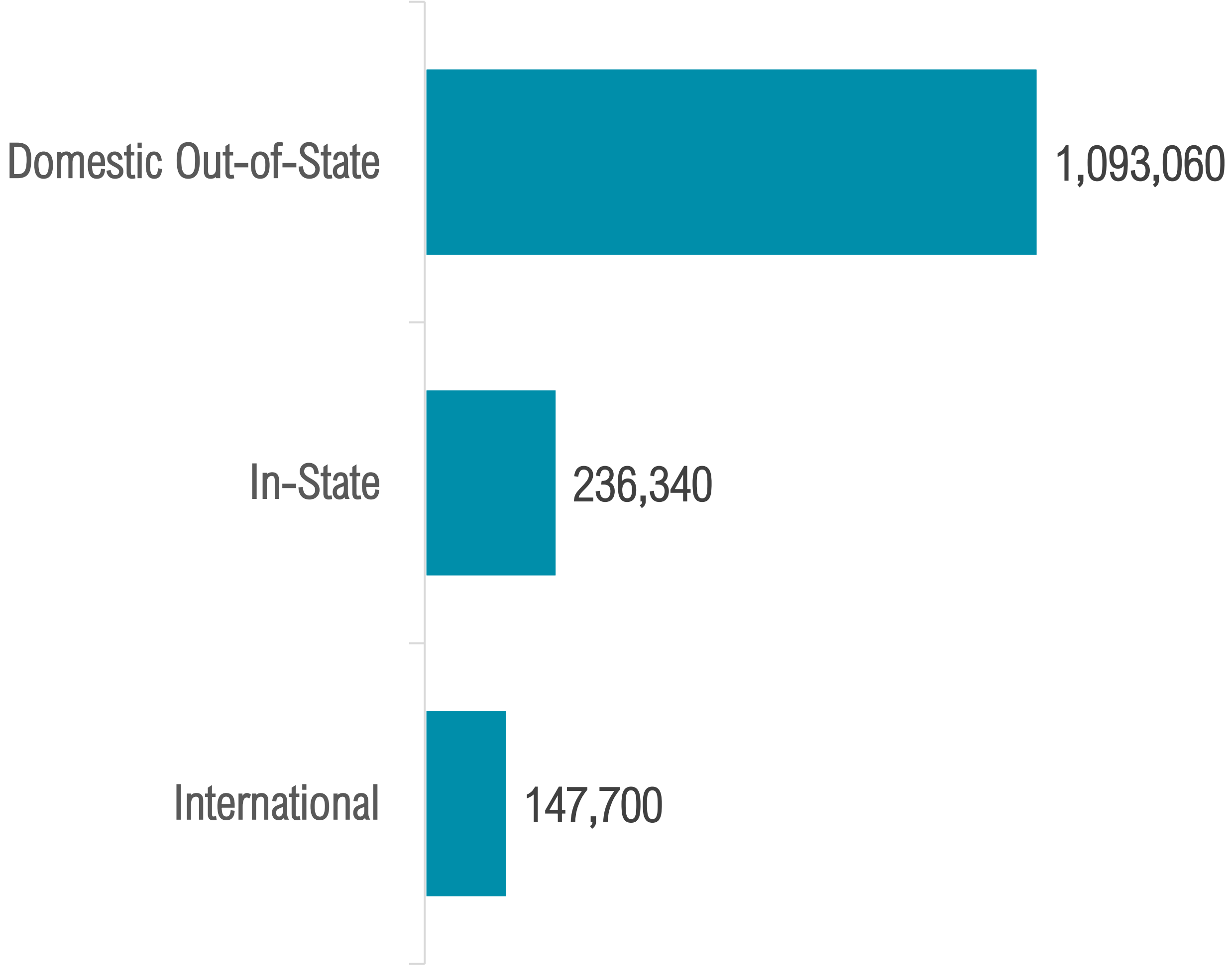
[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers. Based on the Visitor Tracking Study and supplemental data from Arrivalist.

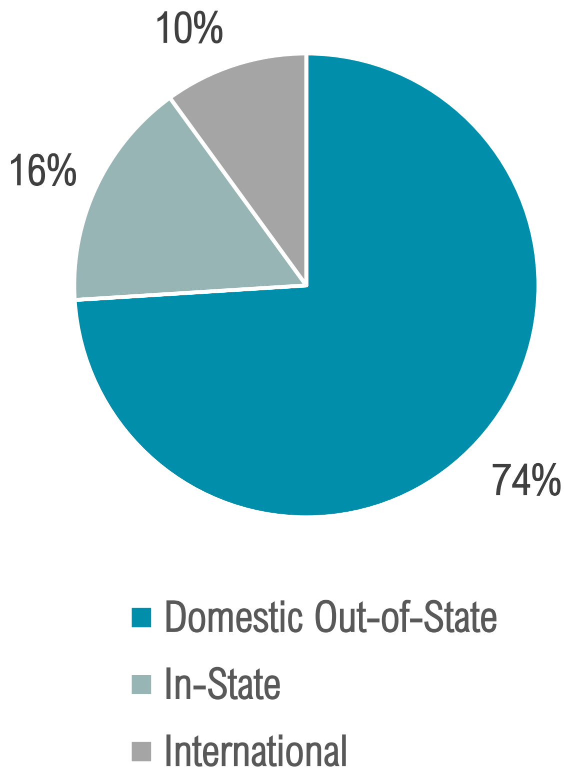
NUMBER OF VISITORS BY ORIGIN[1]



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

NUMBER OF VISITORS BY ORIGIN



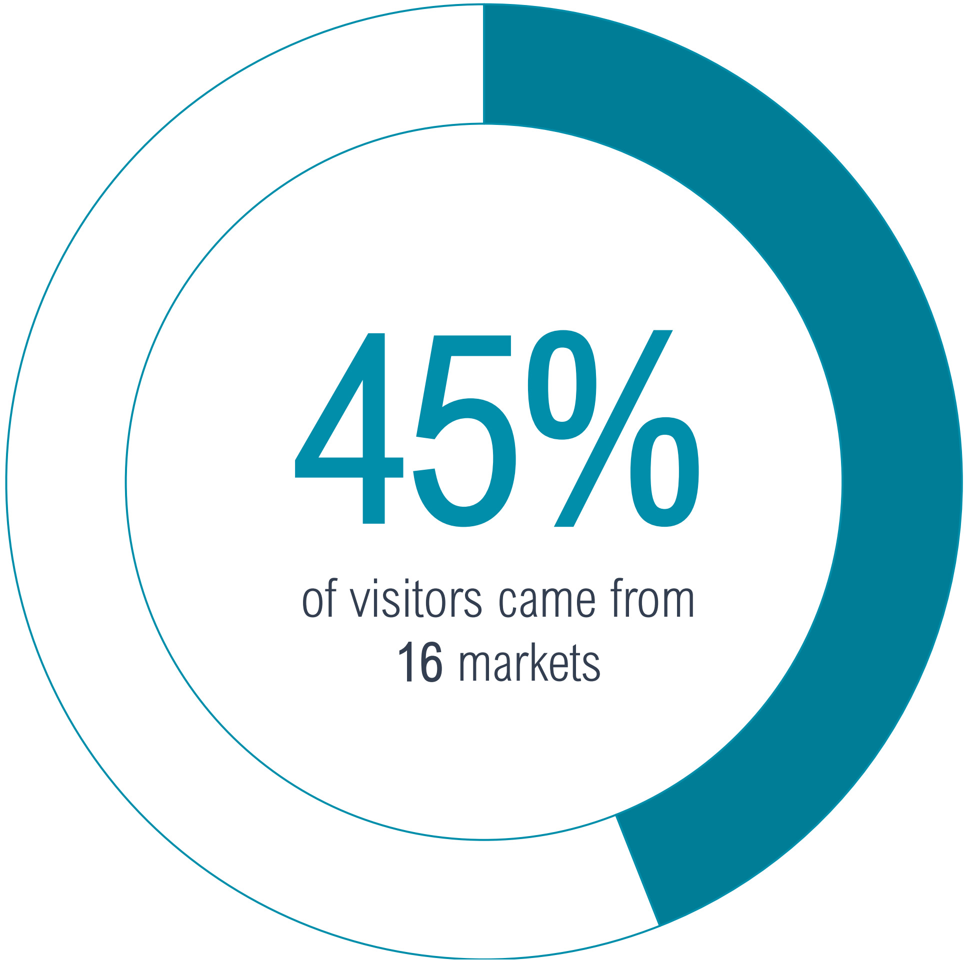


[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers. Based on the Visitor Tracking Study and supplemental data from Arrivalist.

ORIGIN MARKETS[1]

Market [2]	Percentage of Visitors
Miami – Ft. Lauderdale	5%
Tampa – St. Petersburg	5%
New York	4%
Orlando - Daytona Beach	3%
Atlanta	3%
Minneapolis – St. Paul	3%
Chicago	3%
Boston	3%
Detroit	2%
West Palm Beach – Ft. Pierce	2%
Cincinnati	2%
Jacksonville	2%
Cleveland - Akron	2%
Naples	2%
Nashville	2%
Milwaukee	2%

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



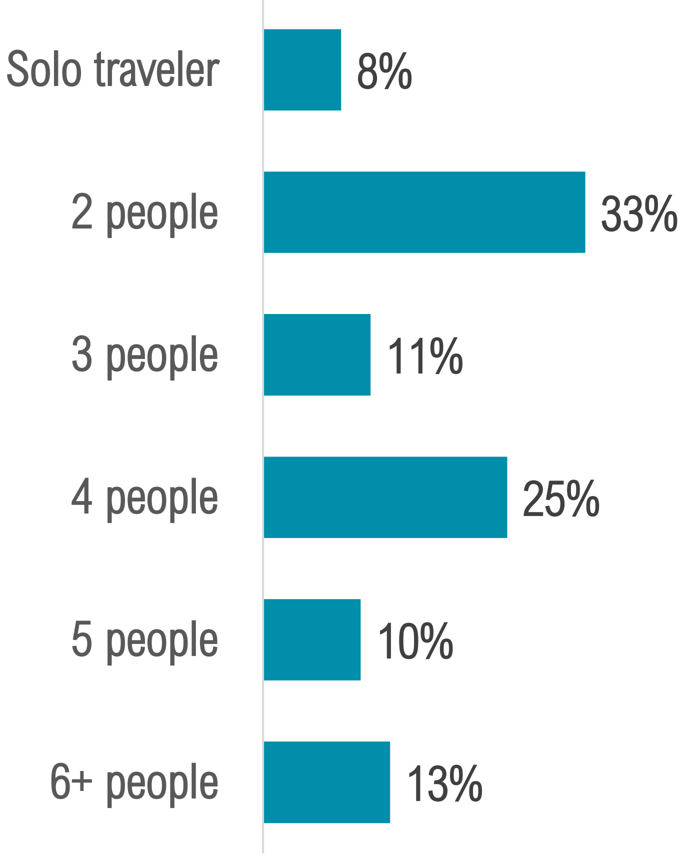
TRAVEL PARTY SIZE AND COMPOSITION

Travel Party Size

Visitors traveled in a party composed of **3.2[1] people**.

Travel with Children

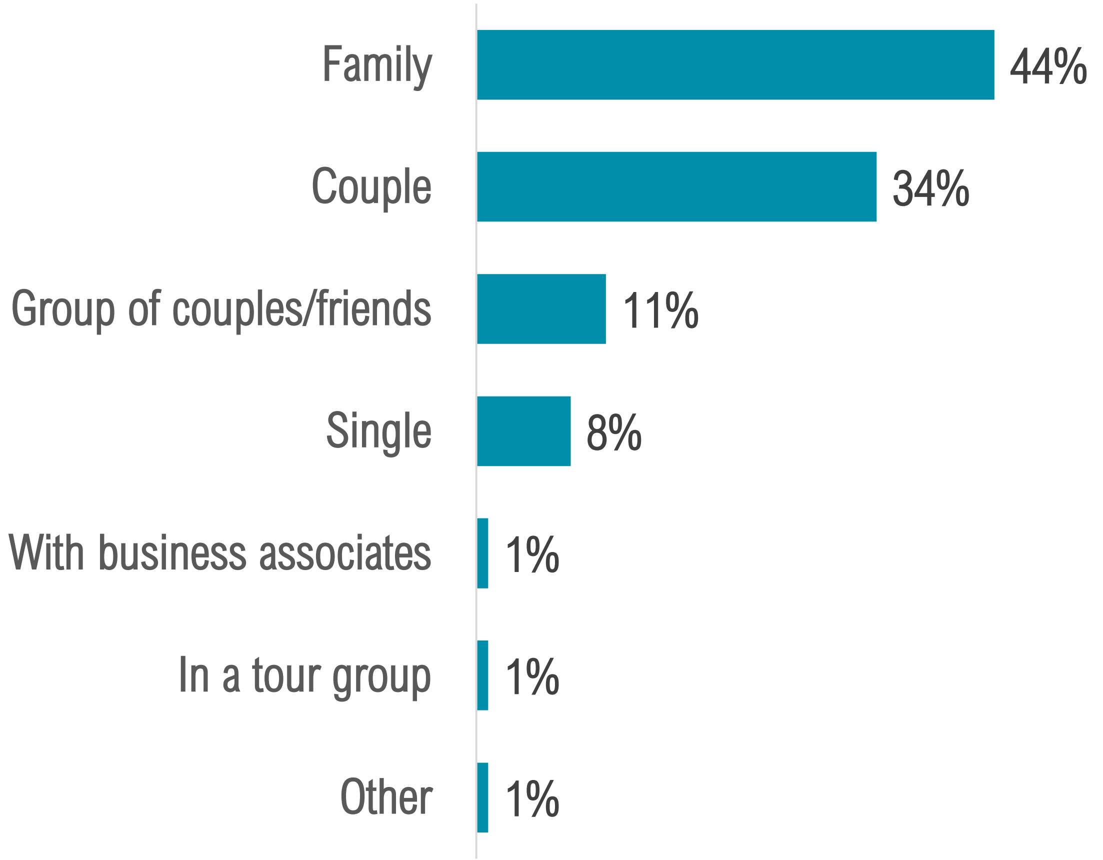
41% of visitors **traveled with children** under the age of 18.



[1]Sources: Occupancy Study for visitors staying in paid accommodations and Visitor Tracking Survey for all other visitors

TRAVEL PARTY TYPE

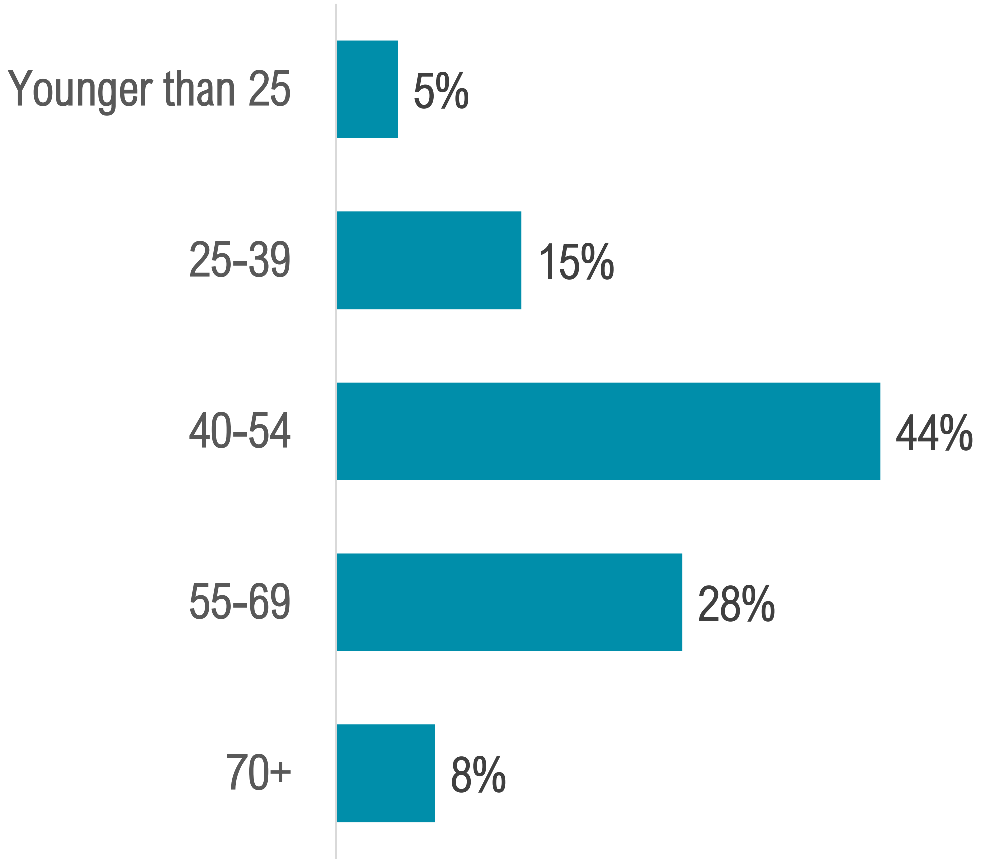
44% of visitors traveled as a family, while a third of visitors traveled as a couple.



AGE

Average Age

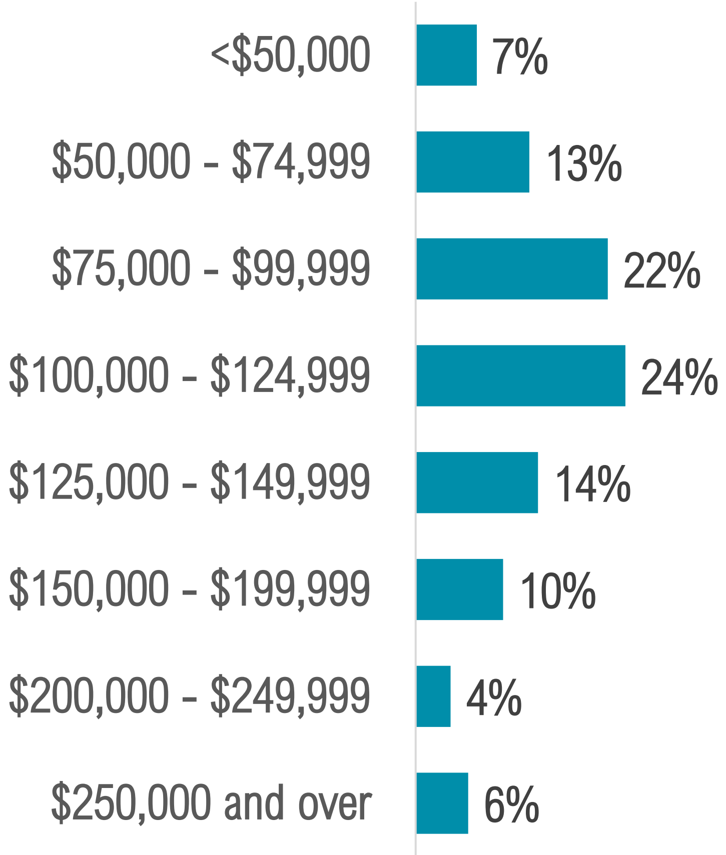
The average age of April – June visitors was 50 years old.



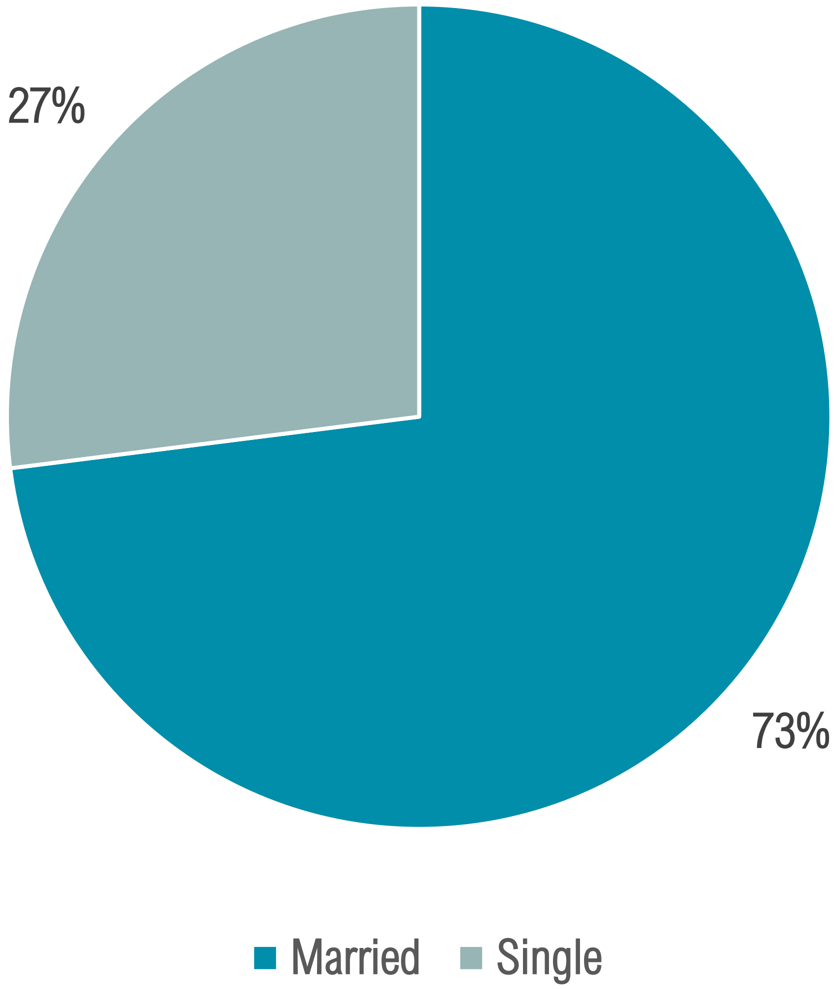
HOUSEHOLD INCOME

Median Household Income
April – June visitors had a median household income of **$108,300.**

10% of visitors had a household income in excess of **$200,000.**



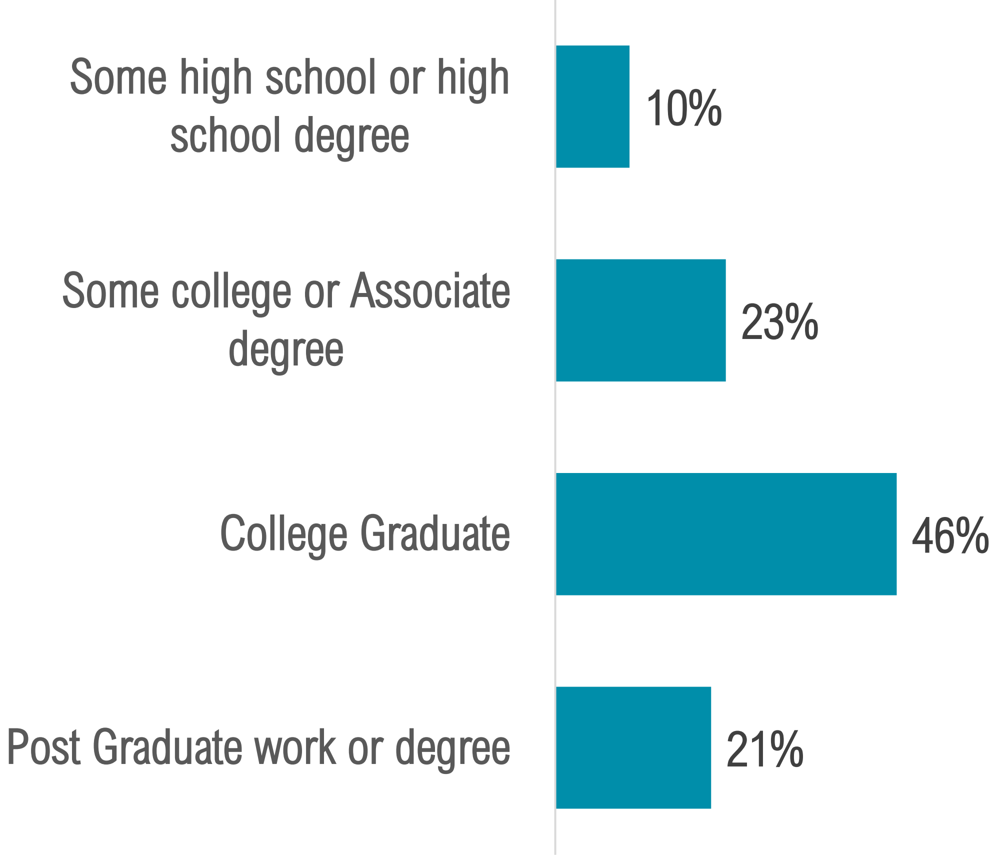
MARITAL STATUS



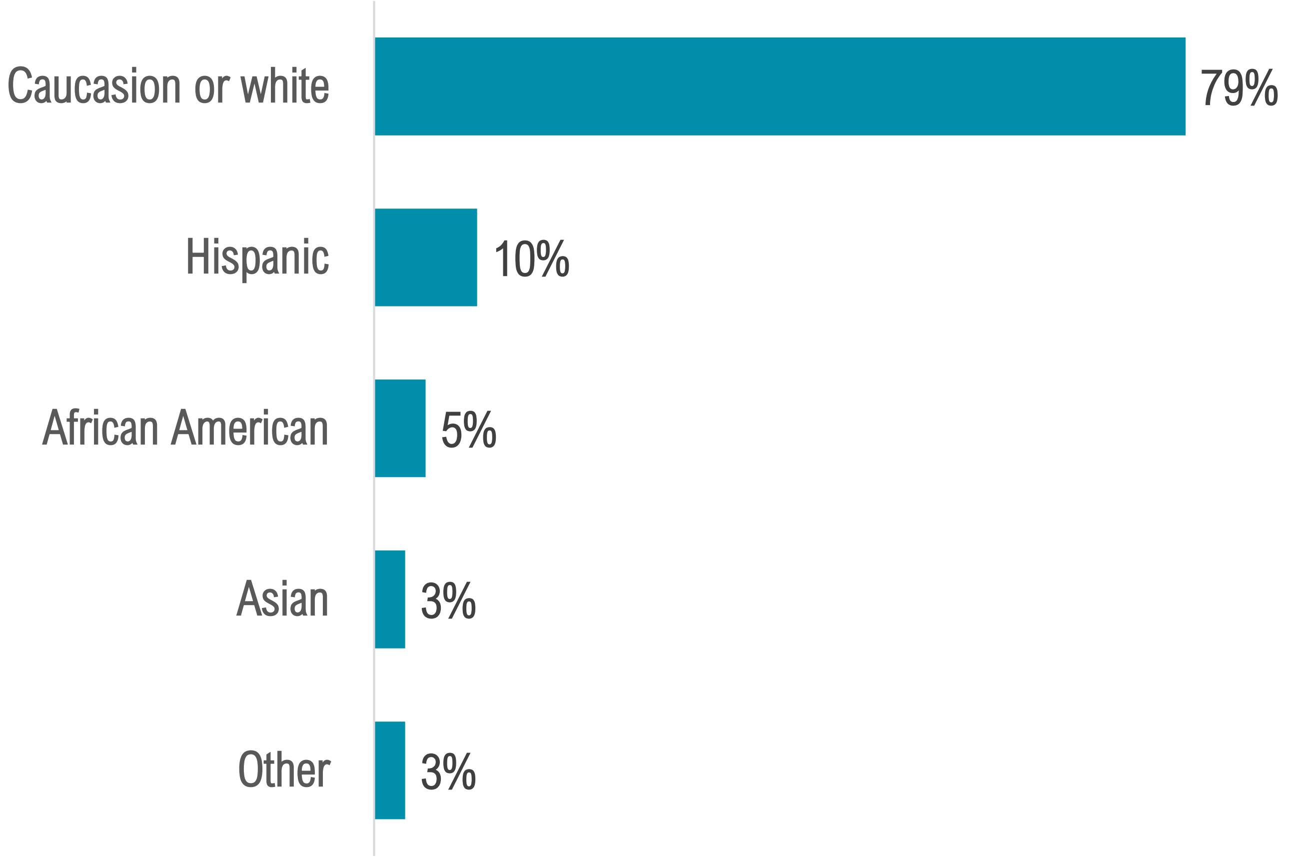
EDUCATION

Education Level

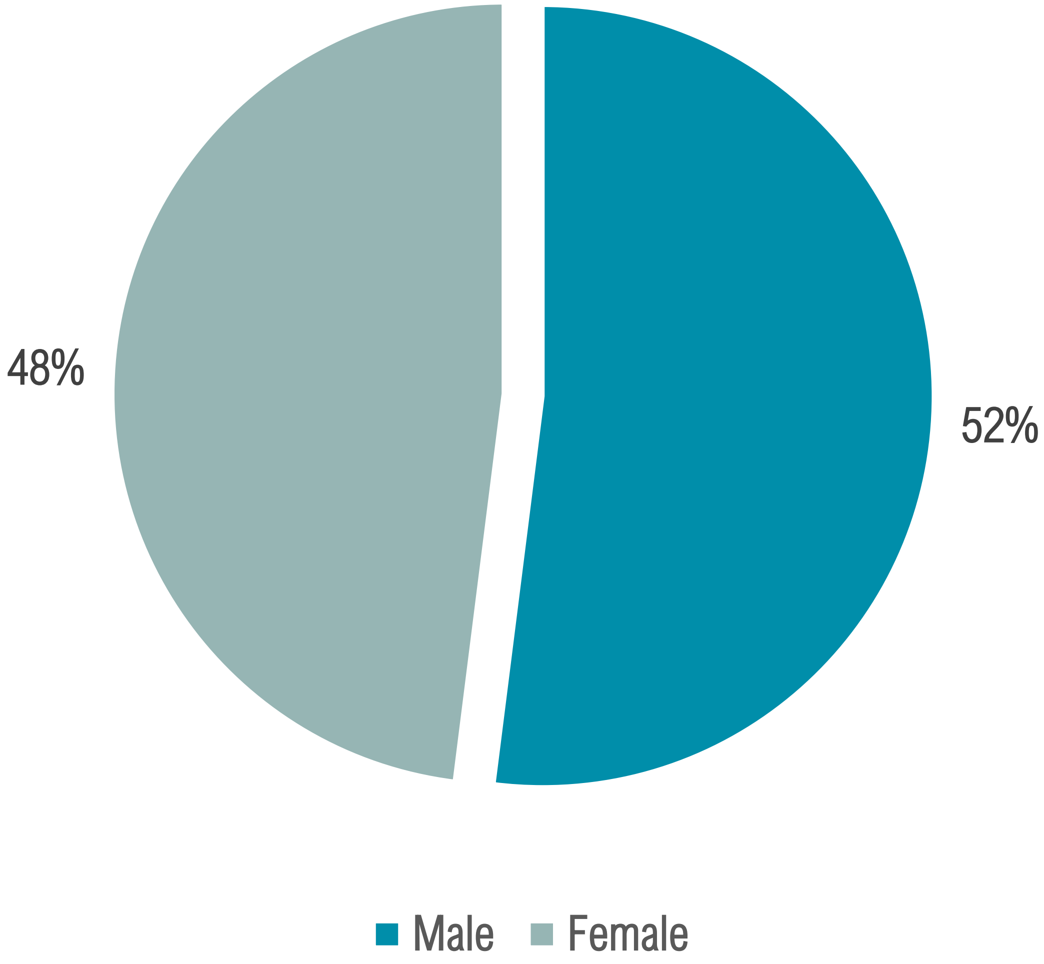
2 in 3 of April – June visitors have a college degree or higher.



RACE/ETHNICITY



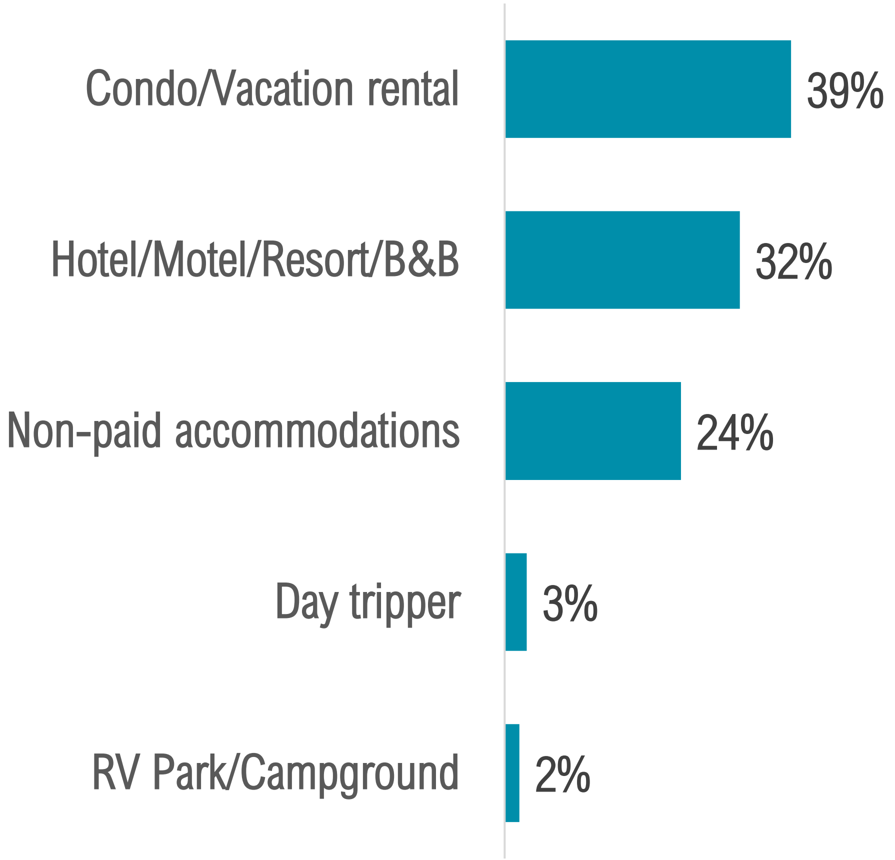
GENDER



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.



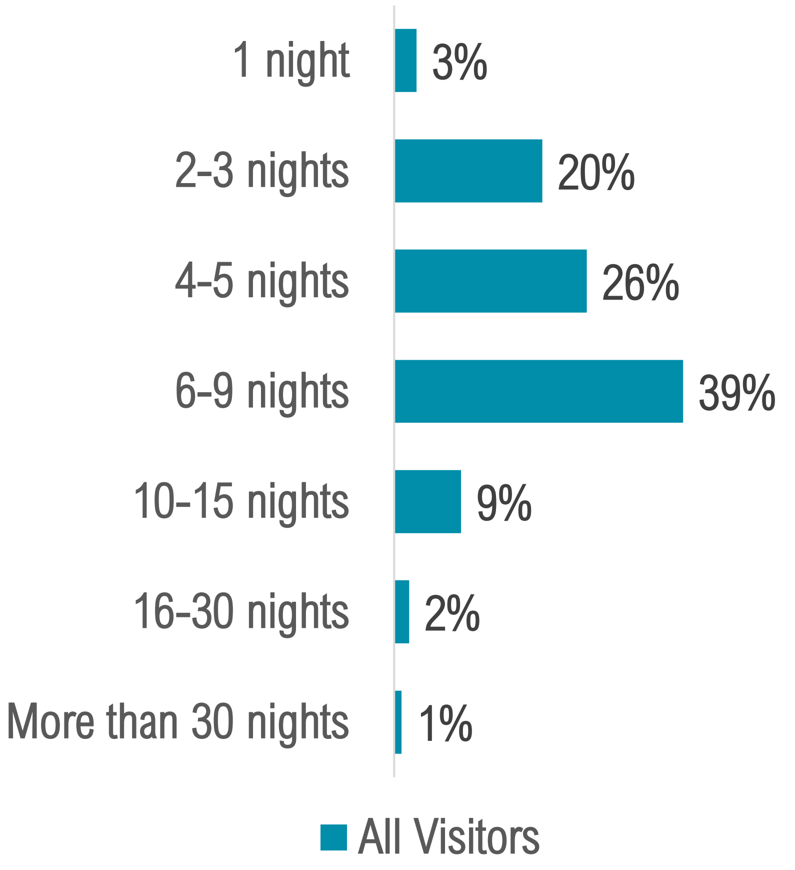
NIGHTS STAYED

All Visitors

Visitors spent an average of **5.6[1] nights** in the Fort Myers area.

Visitors Staying in Paid Accommodations

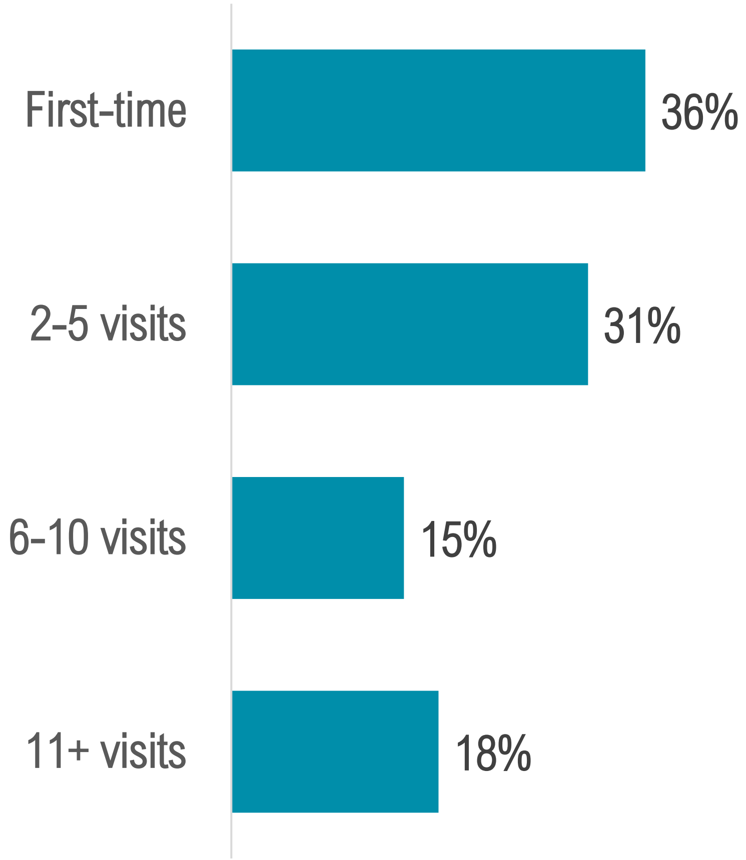
Visitors staying in paid accommodations spent an average of **5.3[2] nights** in the Fort Myers area.



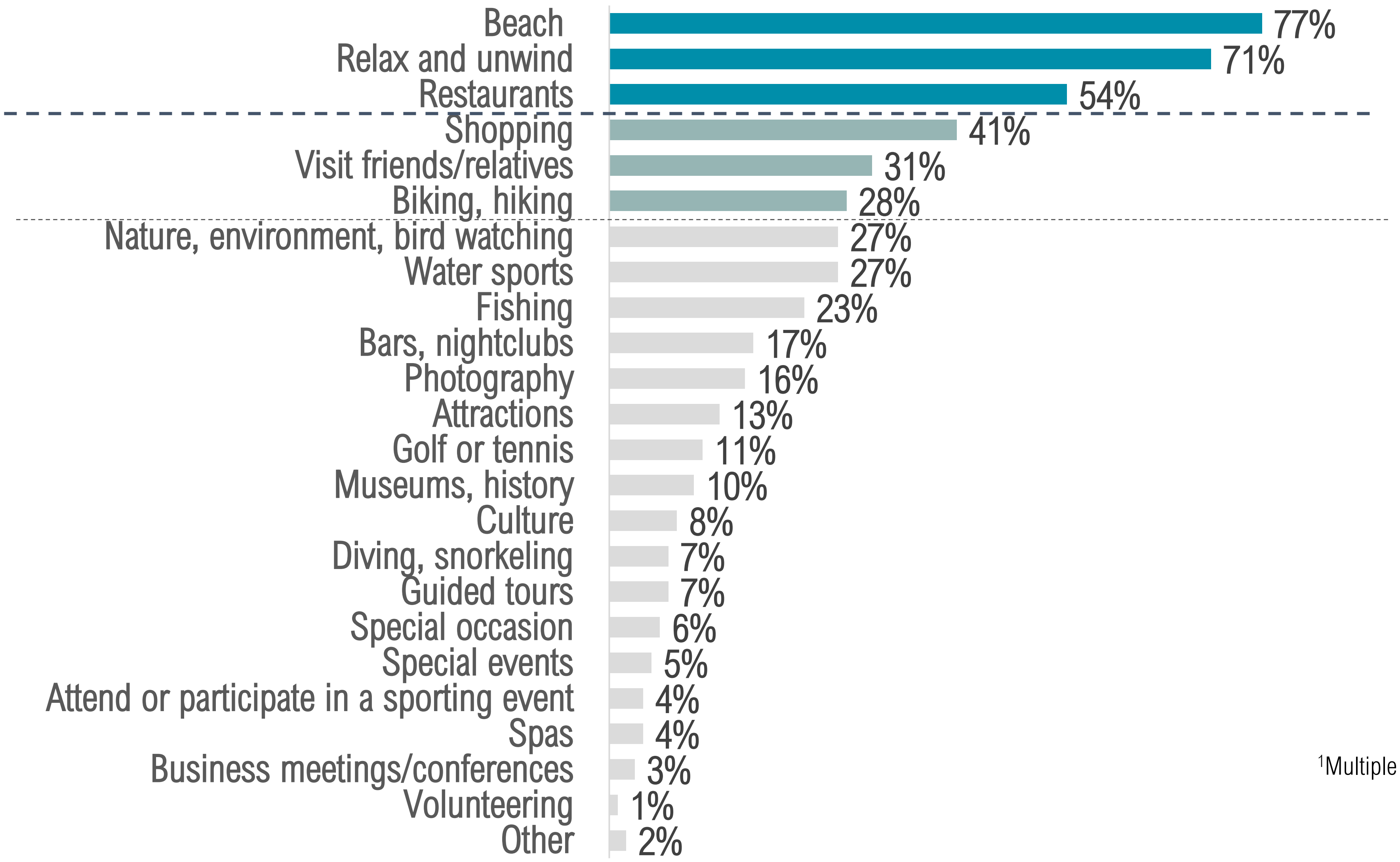
[1]Sources: Occupancy Study for visitors staying in paid accommodations and Visitor Tracking Survey for all other visitors
[2]Source: Occupancy Study

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.

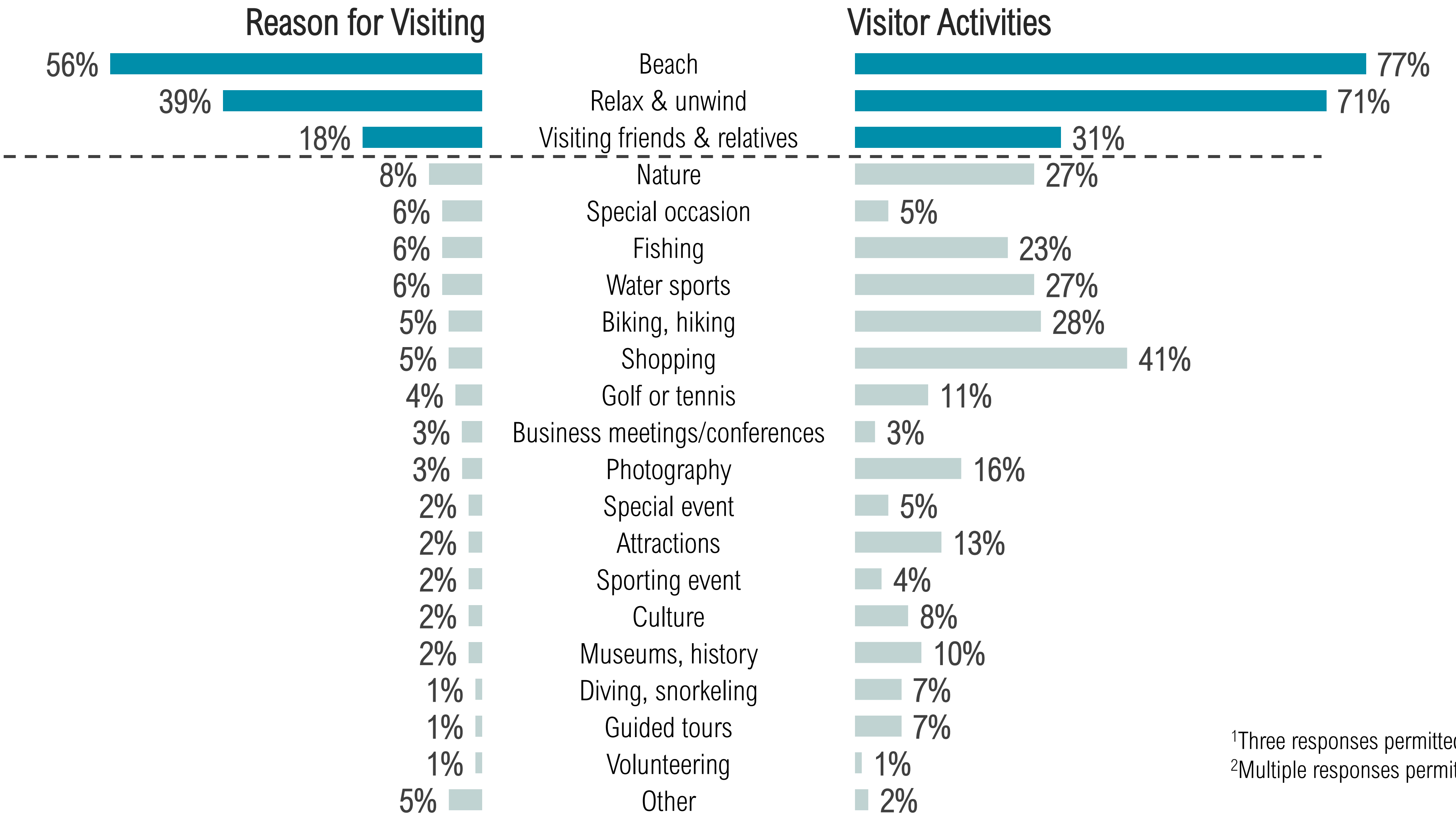


VISITOR ACTIVITIES[1]



[1]Multiple responses permitted.

REASON FOR VISITING[1] VS. VISITOR ACTIVITIES[2]



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

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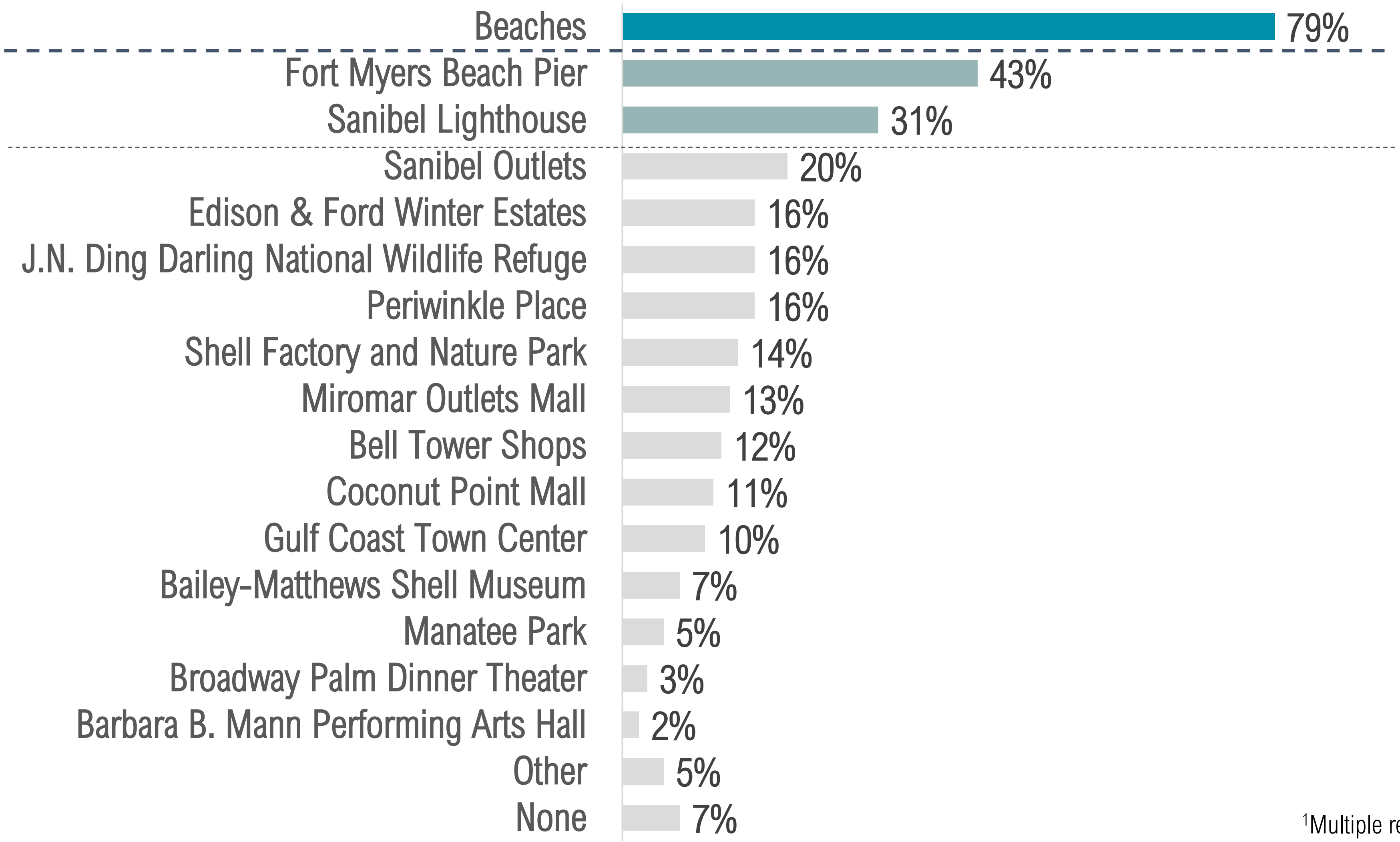
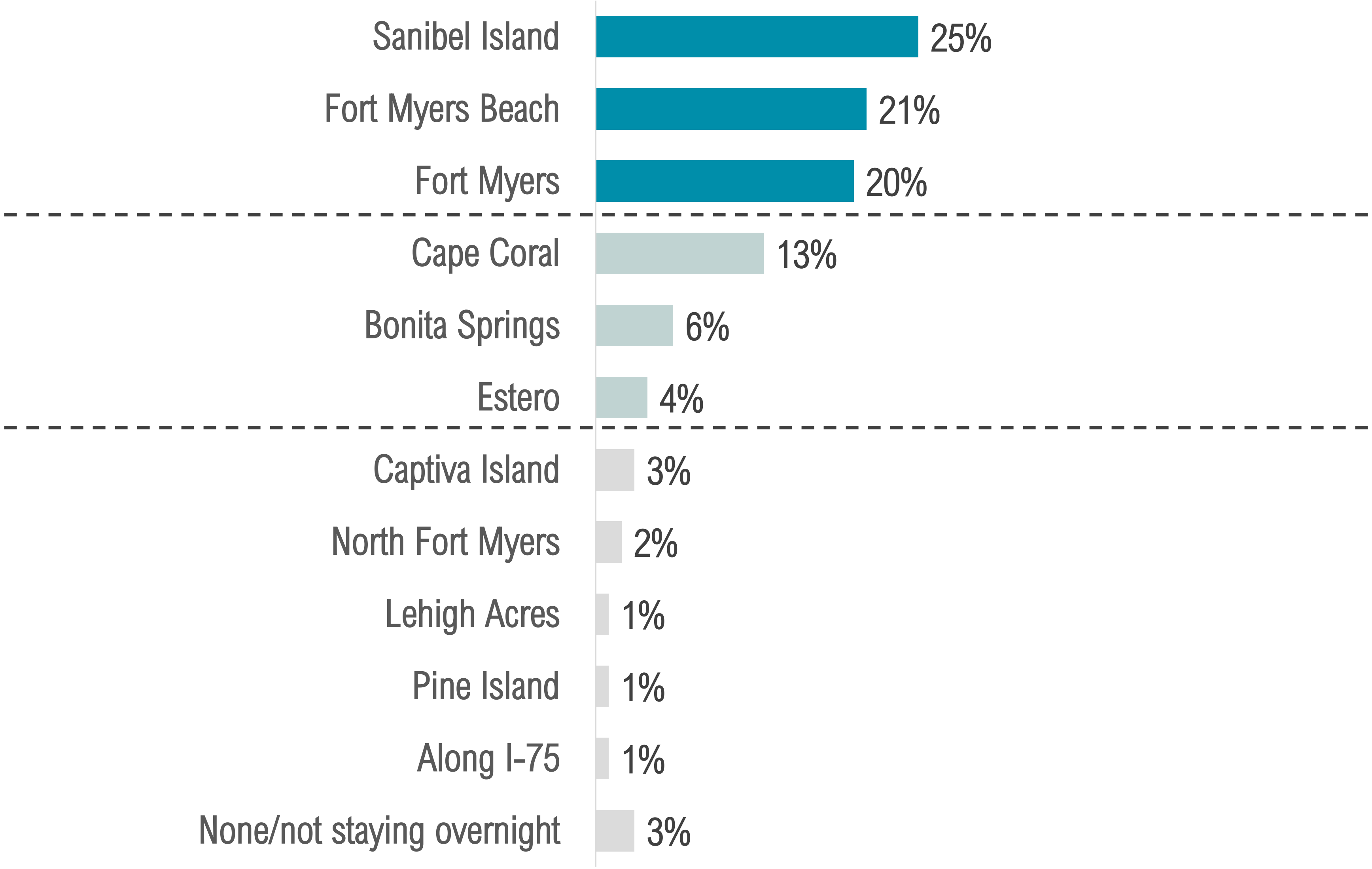
ATTRACTIONS VISITED[1]



[1]Multiple responses permitted.

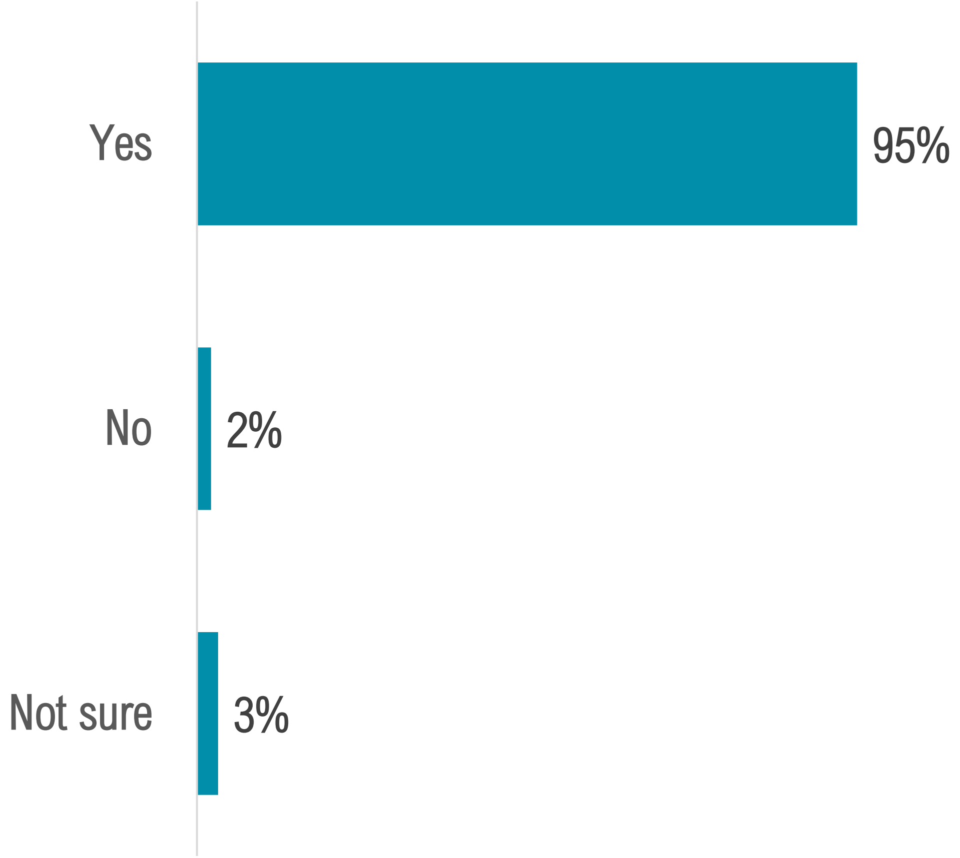
COMMUNITY STAYED



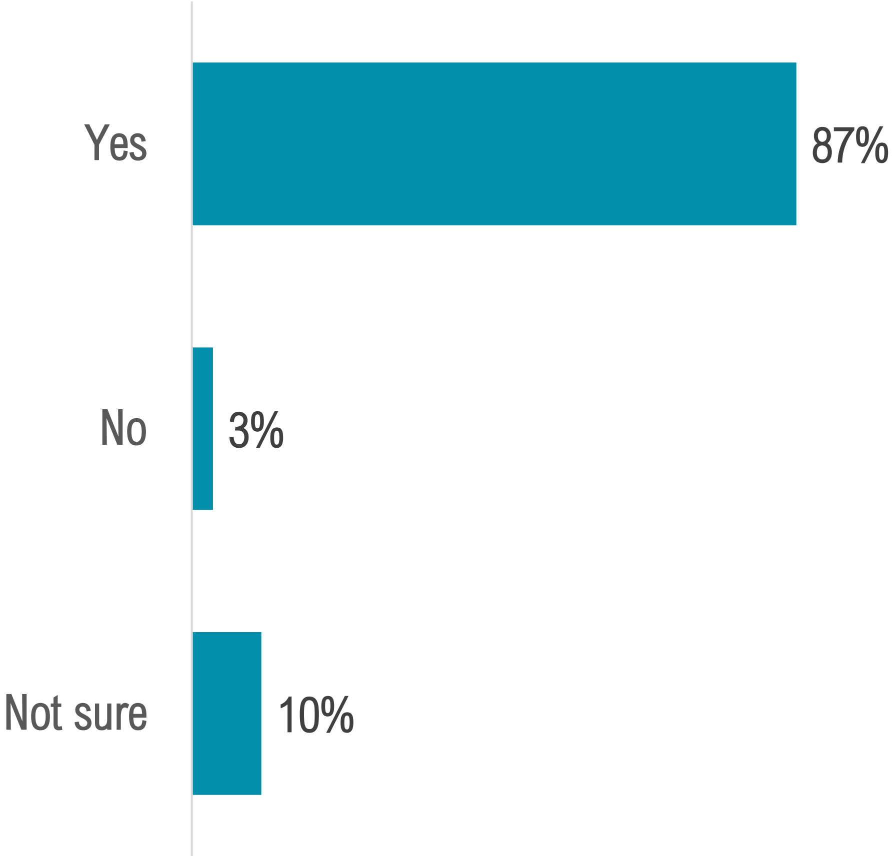
VISITOR JOURNEY: POST-TRIP EVALUATION

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

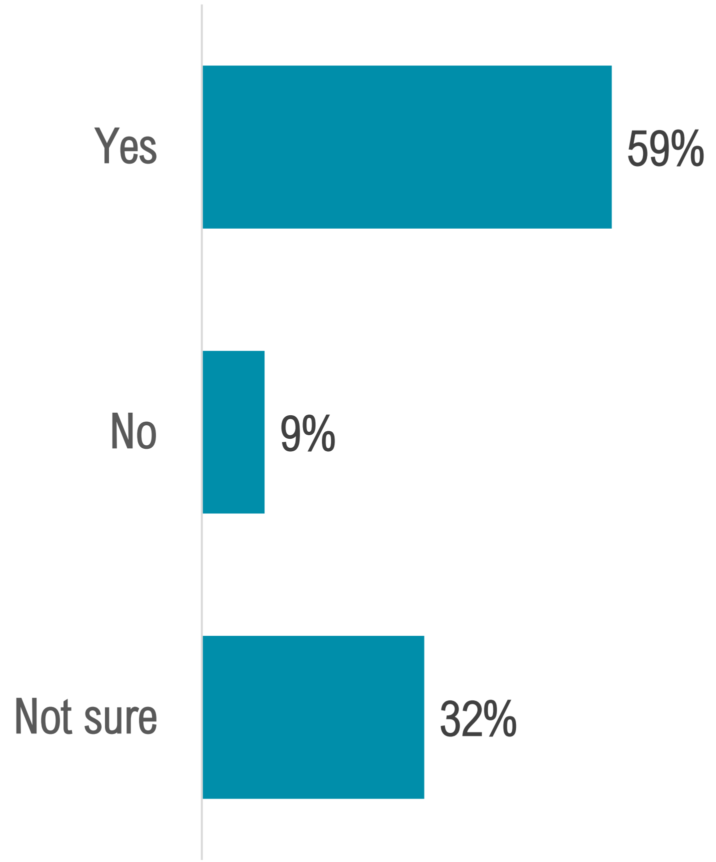
LIKELY TO RECOMMEND



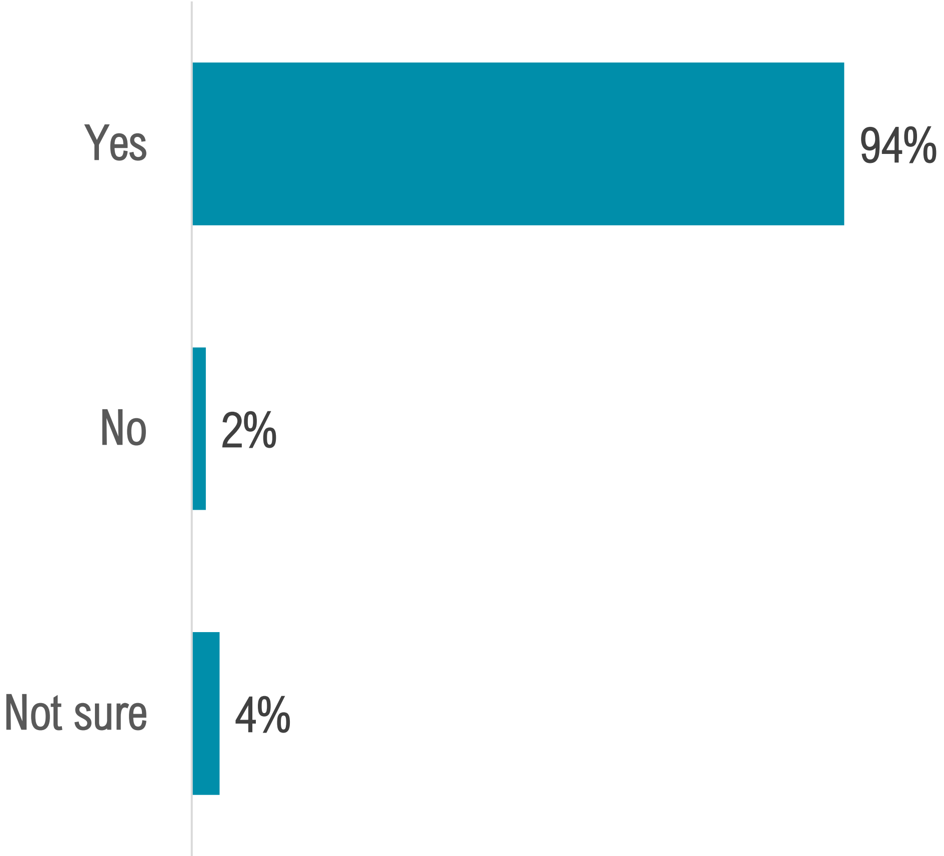
LIKELY TO RETURN



LIKELY TO RETURN NEXT YEAR



FEEL WELCOME

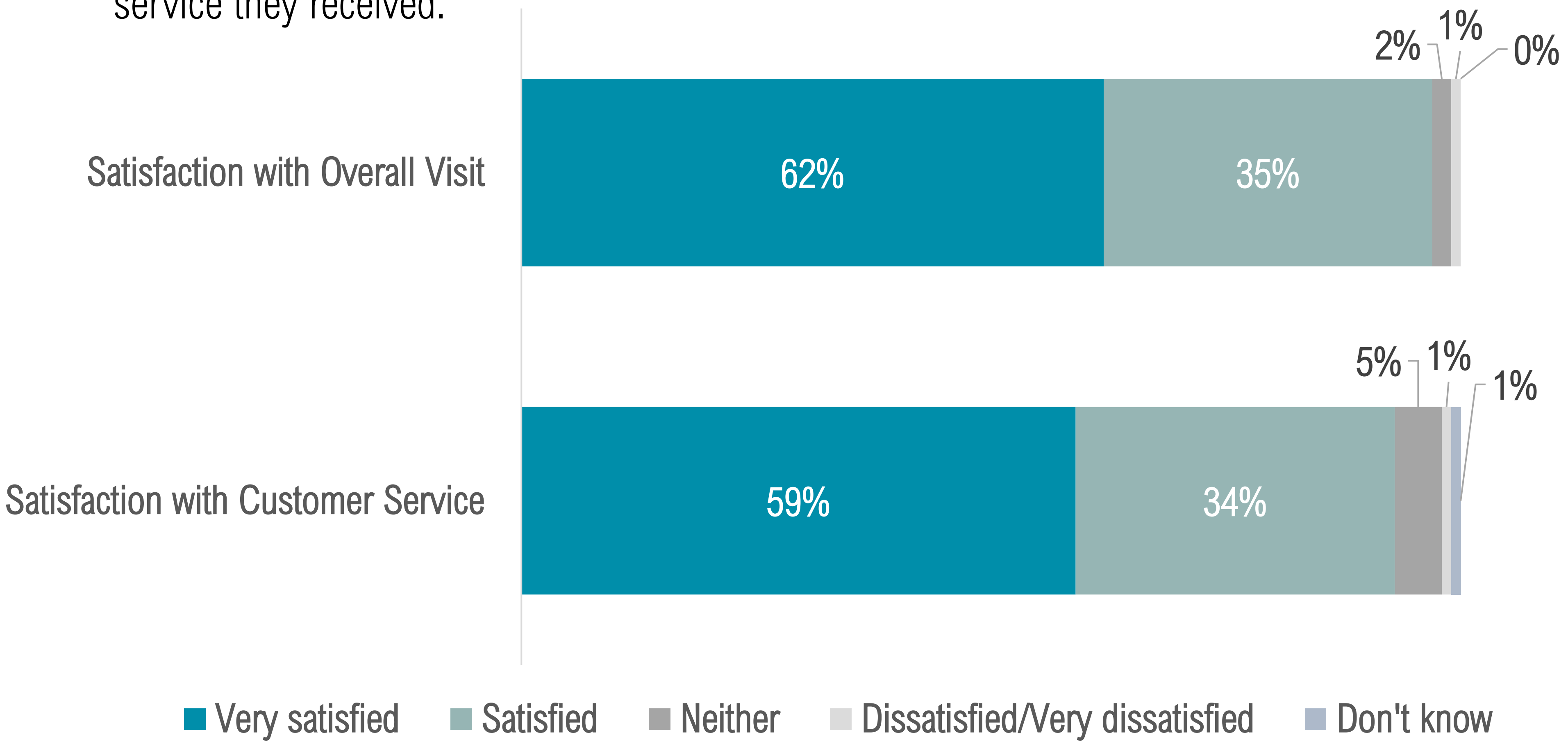


SATISFACTION RATINGS

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2021	2022	2021	2022	2021	2022	2021	2022
Likely to Recommend	92%	93%	98%	97%	96%	96%	96%	95%
Likely to Return	79%	75%	94%	93%	91%	87%	82%	84%
Likely to Return Next Year	33%	32%	64%	72%	57%	59%	30%	51%

SATISFACTION

- Compared to 2021, visitors were less likely to be **very satisfied** with their overall visit or the customer service they received.



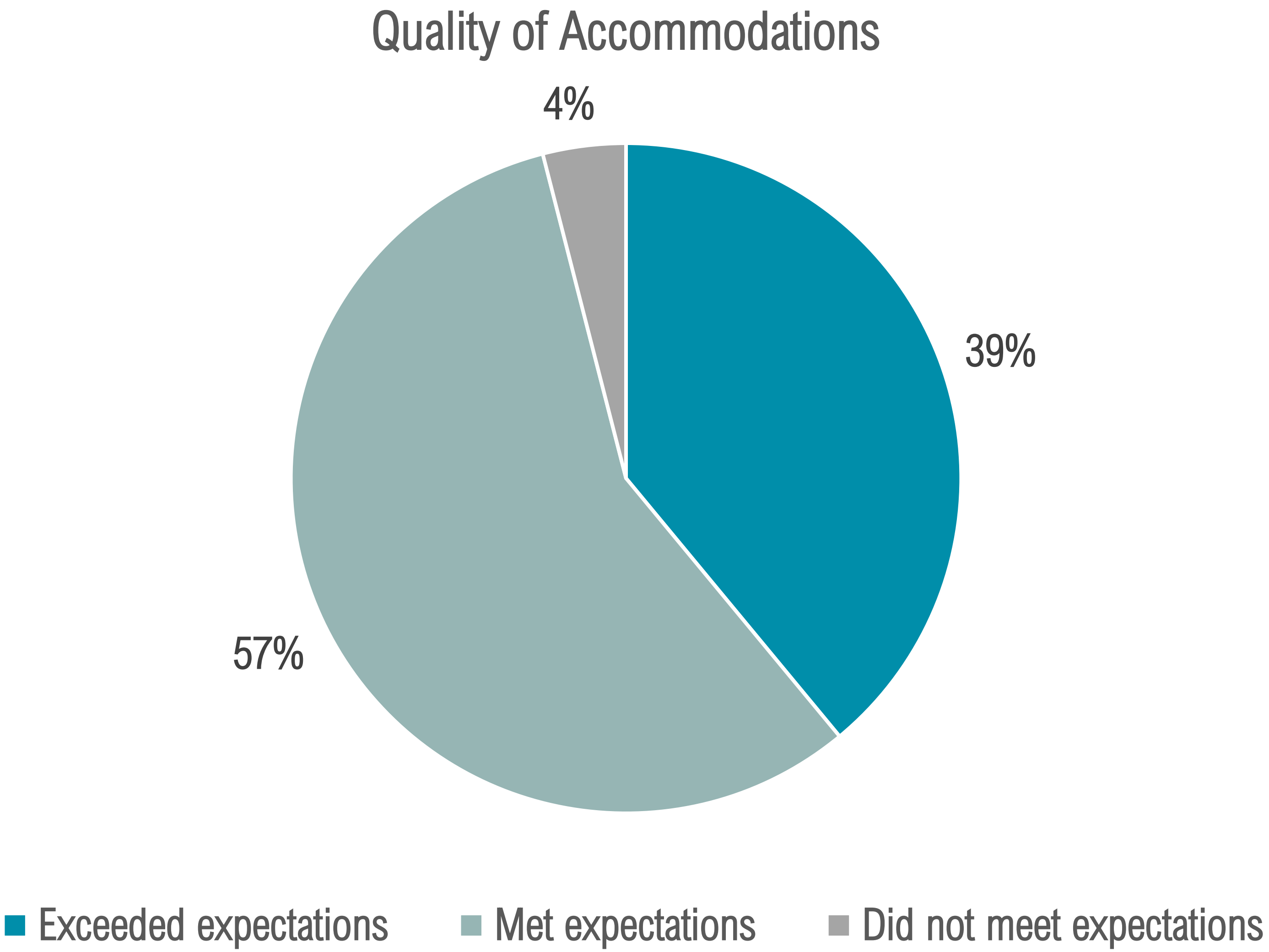
SATISFACTION RATINGS: OVERALL VISIT

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2021	2022	2021	2022	2021	2022	2021	2022
Very Satisfied	65%	49%	77%	70%	73%	61%	56%	67%
Satisfied	29%	46%	22%	27%	24%	35%	41%	31%

SATISFACTION RATINGS: CUSTOMER SERVICE

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2021	2022	2021	2022	2021	2022	2021	2022
Very Satisfied	57%	50%	69%	65%	66%	59%	53%	62%
Satisfied	30%	41%	27%	29%	28%	35%	34%	31%

SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

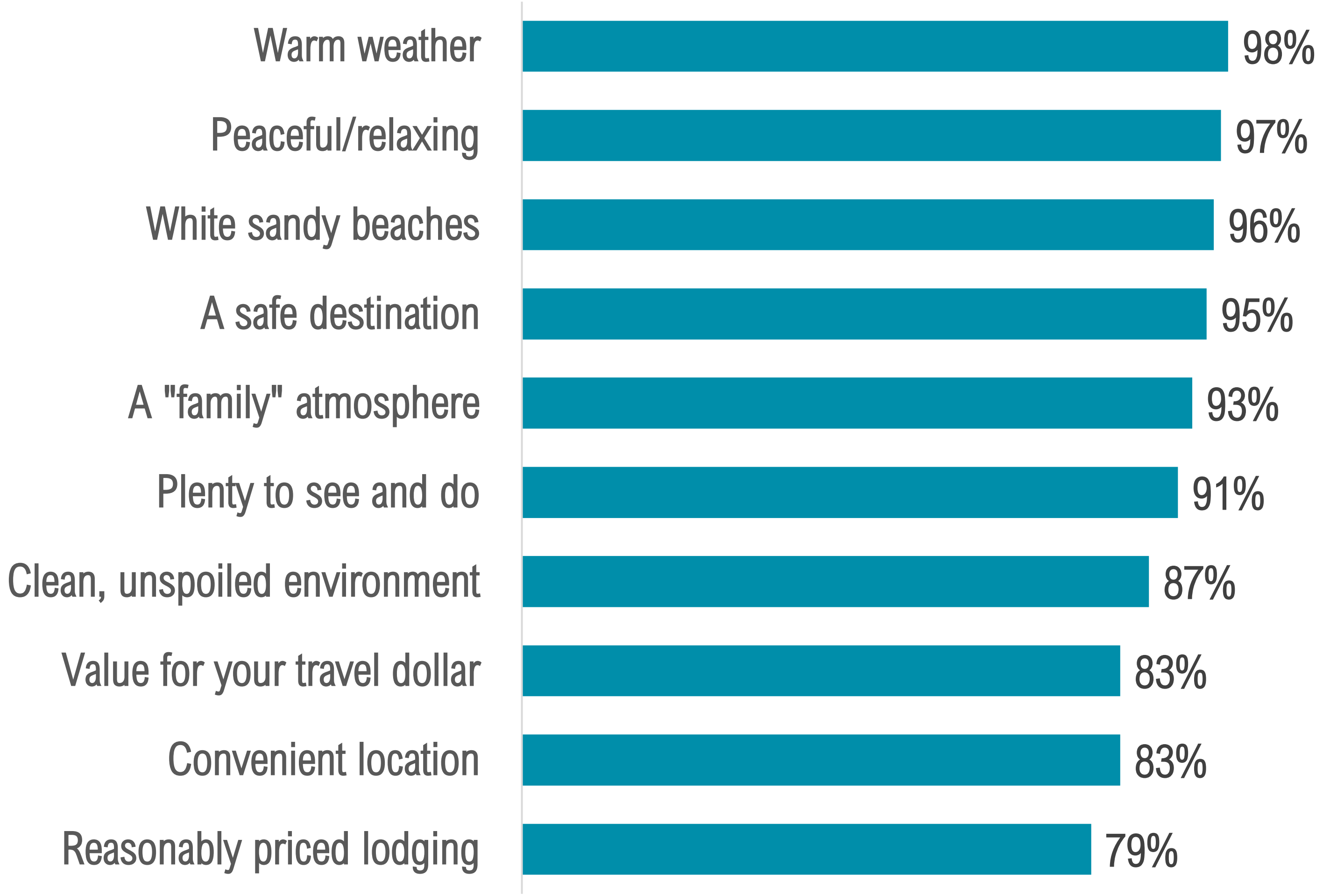


SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2021	2022	2021	2022	2021	2022	2021	2022
Exceeded Expectations	41%	40%	43%	39%	40%	38%	32%	46%
Met Expectations	53%	56%	55%	58%	56%	58%	63%	52%
Did Not Meet Expectations	6%	4%	3%	4%	4%	4%	5%	2%

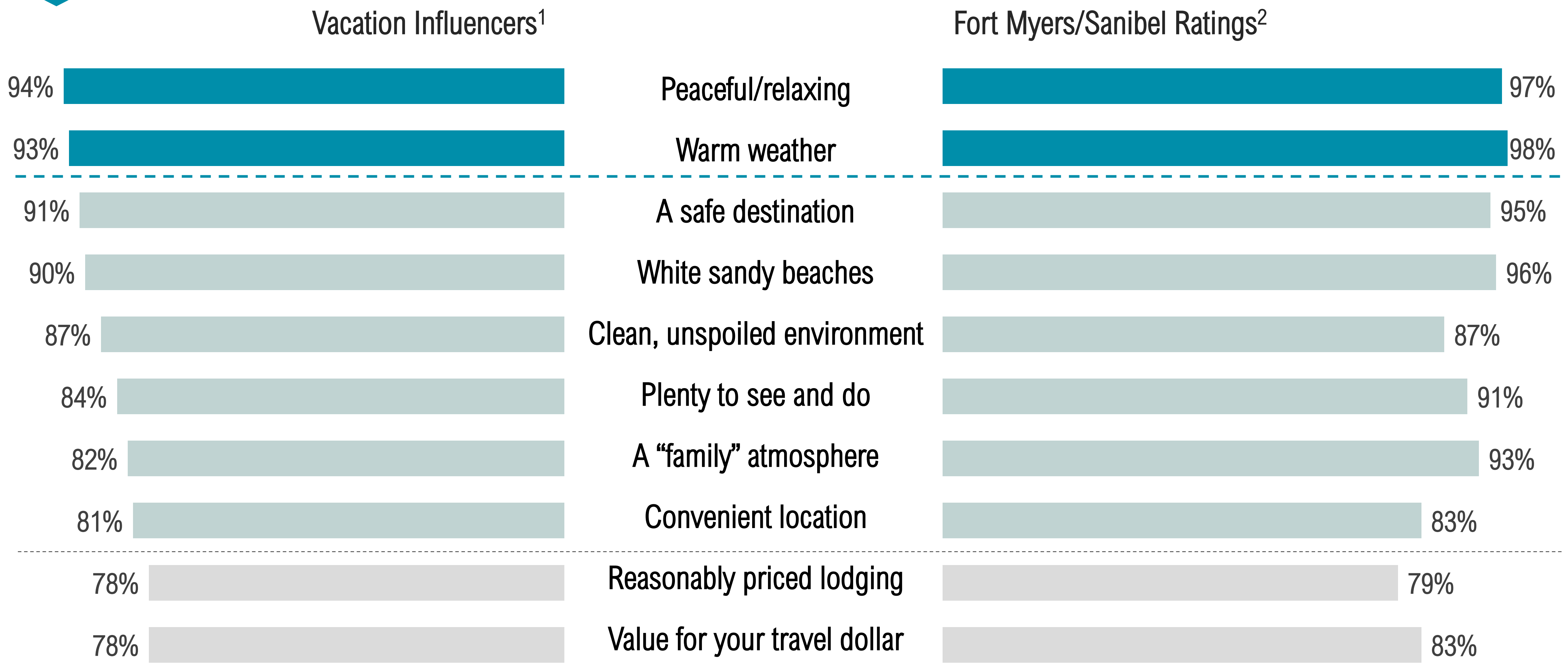
ATTRIBUTE RATINGS[1]

At least **90%** of visitors gave high attribute ratings for **warm weather, peacefulness, white sandy beaches, safety, its “family” atmosphere,** and the fact that there is **plenty to see and do** in the Fort Myers area.



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

VACATION ATTRIBUTE INFLUENCE VS. RATINGS



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

Post-Trip Evaluation
April – June 2022

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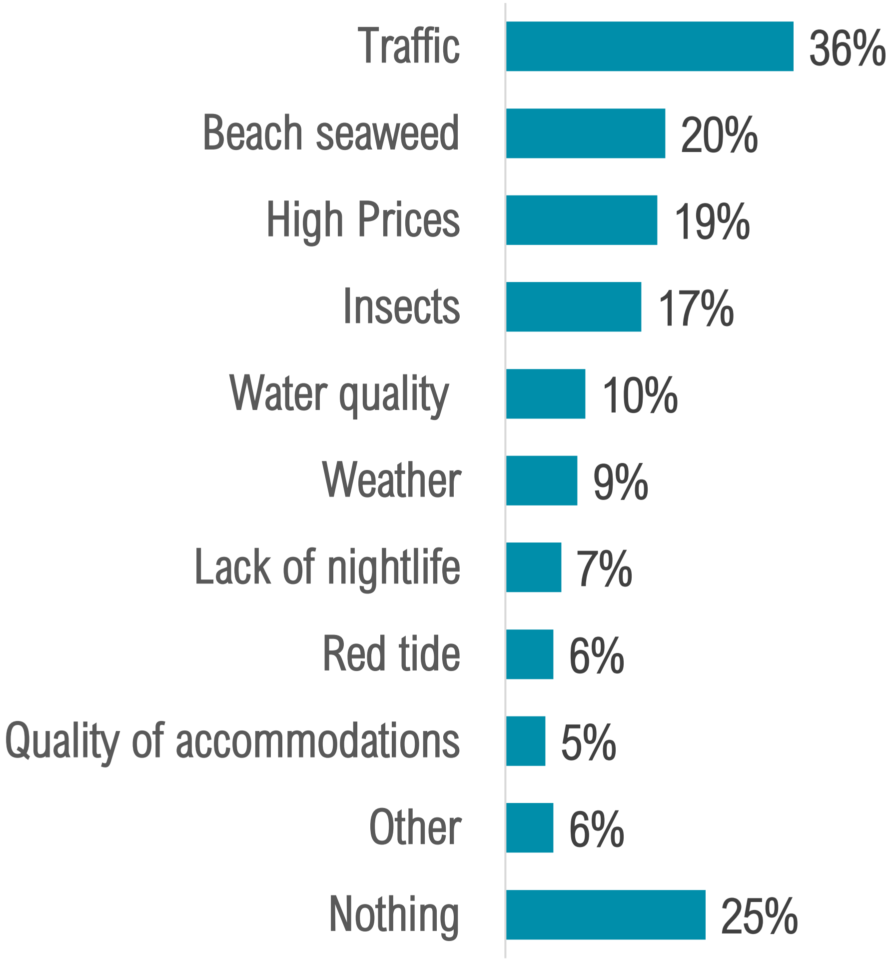
LEAST LIKED FEATURES[1]

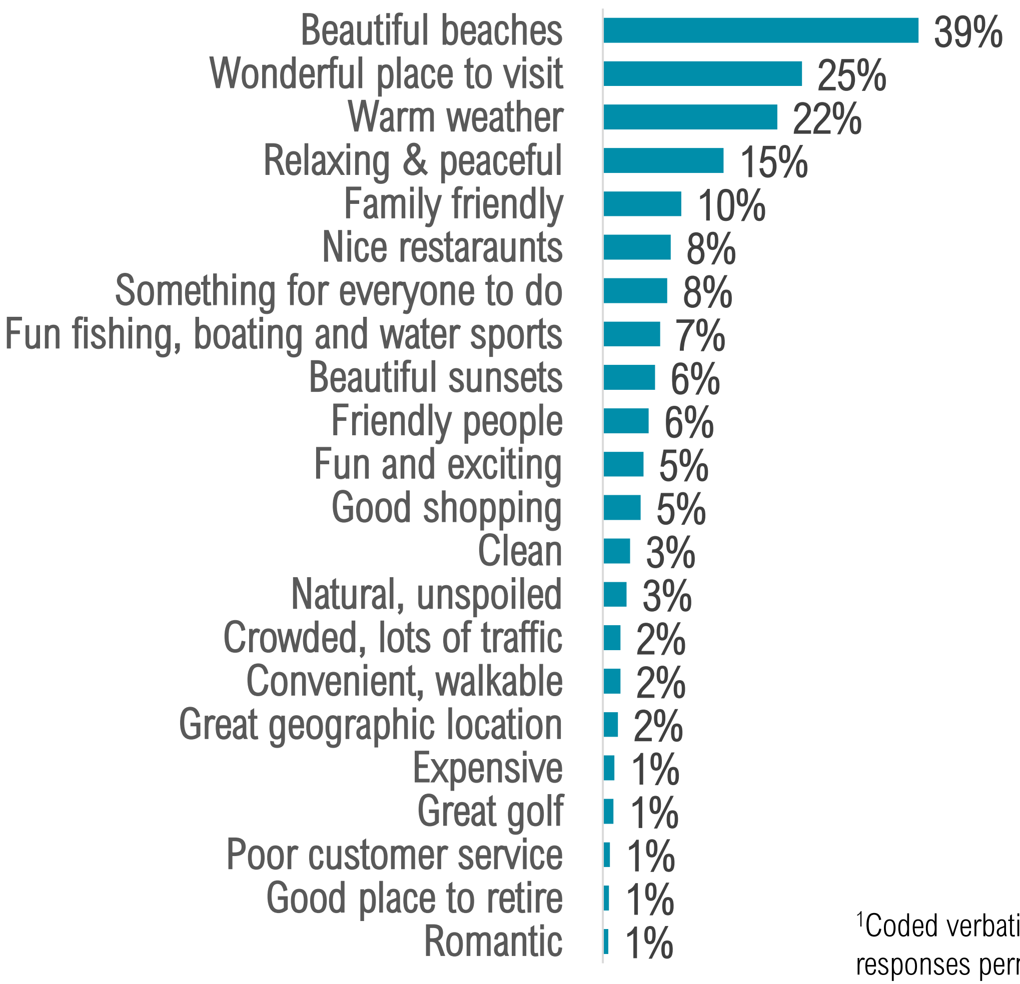
Over 1 in 3 visitors were concerned about traffic, while 1 in 5 were concerned with beach seaweed and high prices during their visit.



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

AREA DESCRIPTIONS[1]

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



[1]Coded verbatim responses; multiple responses permitted.

AREA DESCRIPTIONS

Beautiful Beaches

- "Our annual vacation with gorgeous beaches, great weather, and very safe for the family."
- "Beautiful vacation with great weather, gorgeous beaches, and it's family oriented."
- "The beaches are so refreshing on a hot day. We loved watching the dolphins. Great ice cream too right on the beach."

Wonderful Place to Visit

- "The area is wonderful for a long getaway. We enjoyed the history and the museums."
- "We enjoy having a second home here. The lifestyle is so relaxed."
- "Incredible vacation with great weather, unbelievable fishing, and Jet Skiing with near perfect weather."

AREA DESCRIPTIONS

Warm Weather

- “Wonderful weather, gorgeous beaches, stellar atmosphere, and family oriented.”
- “The weather was impeccable. The beaches and sunsets are second to none and there are great golf courses and Jet Skis.”
- “Great weather and terrific accommodations. Beach was great also.”

Relaxing & Peaceful

- “The most wonderful, quiet spot to just relax and enjoy the warmth.”
- “Peaceful paradise with a lot of original beach areas and a place to enjoy the silence and nature.”
- “Peaceful and relaxing, family atmosphere. And tons of fun. Much better than Los Angeles.”

OCCUPANCY BAROMETER[1]: JULY – SEPTEMBER RESERVATIONS

July – Sept Reservations	July – Sept 2021	July – Sept 2022
Up	72%	34%
Same	24%	32%
Down	1%	33%
Not Sure	3%	1%

[1]Sources: Occupancy Survey
Accommodations partners were asked the following, "Please think about your reservations for the next three months. Compared to July through September of 2021, would you say the total level of reservations are up, the same, or down?"

OCCUPANCY BAROMETER[1]: OCTOBER – DECEMBER RESERVATIONS

Oct – Dec Reservations	Oct – Dec 2021	Oct – Dec 2022
Up	76%	54%
Same	14%	32%
Down	6%	14%
Not Sure	4%	0%

[1]Sources: Occupancy Survey

Accommodations partners were asked the following, "Please think about your reservations for the next three months. Compared to October through December of 2021, would you say the total level of reservations are up, the same, or down?"

Year-Over-Year Comparisons

ECONOMIC IMPACT

Visitor & Lodging Statistics	April – June 2021	April – June 2022	% Change '21 – '22
Visitors[1]	1,309,300	1,477,100	+ 12.8%
Room Nights[1]	1,766,300	1,748,800	- 1.0%
Direct Expenditures[2]	$996,169,300	$1,206,349,700	+ 21.1%
Total Economic Impact[3]	$1,587,893,900	$1,921,715,100	+ 21.1%
Occupancy	74.8%	68.4%	- 8.6%
ADR	$160.77	$190.79	+ 18.7%
RevPAR	$120.33	$130.50	+ 8.5%

[1] Visitors are up, yet room nights are essentially stable because of a decrease in length of stay and more reliance on the Department of Business and Professional Regulation's estimate of rental units available

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

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

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM

	April – Dec 2019	April – June 2021	April – June 2022	% Change '21 – '22
Direct Jobs	9,795	13,389	15,600	+ 16.4%
Total Jobs	13,616	18,738	21,500	+ 14.7%
Direct Wages	$227,418,700	$299,921,900	$355,358,800	+ 18.5%
Total Wages	$371,877,000	$492,541,200	$584,682,900	+ 18.7%
Direct Local Taxes	$23,213,200	$30,383,100	$37,155,500	+ 22.3%
Total Local Taxes	$41,716,300	$53,670,800	$63,993,100	+ 19.2%
Direct State Taxes	$51,738,500	$70,827,600	$86,012,700	+ 21.4%
Total State Taxes	$77,760,000	$104,007,000	$125,295,800	+ 20.5%

VISITOR TYPE

Visitor Type	April – June 2021	April – June 2022
Visitors in Paid Accommodations	72%	73%
Visitors in Non-Paid Accommodations	24%	24%
Day Trippers	4%	3%

PRE-VISIT

Planned trip in advance	April – June 2021	April – June 2022
1 week or less	4%	6%
2-4 weeks	13%	16%
1-2 months	31%	31%
3-6 months	32%	28%
6 months or more	20%	18%
Not sure	0%	1%

Considered Other Destinations	April – June 2021	April – June 2022
Yes	25%	29%
No	75%	71%

PRE-VISIT

Trip Planning Websites/Apps[1]	April – June 2021	April – June 2022
Online search engines	30%	31%
Airbnb, VRBO, HomeAway etc.	32%	25%
Airline websites/apps	26%	24%
Vacation rental websites/apps	22%	22%
Booking websites	21%	20%
Traveler reviews, blogs, stories	13%	18%
Hotel websites/apps	16%	17%
Trip Advisor	18%	14%
VCB Facebook Page	11%	13%
www.VisitFortMyers.com	8%	12%
Visit Florida	8%	11%
Facebook	8%	8%
Instagram	6%	4%
YouTube, Hulu, Pandora	5%	4%
Other	4%	4%
None/Don't visit websites	16%	18%

[1]Multiple responses permitted.

PRE-VISIT

Information Requests[1]	April – June 2021	April – June 2022
Call hotel/motel/condo	26%	27%
Visitor guide	8%	12%
Calling the VCB	4%	4%
VCB E-newsletter	3%	4%
Calling the local Chamber of Commerce	3%	2%
Other	2%	2%
None/Did not request info	63%	63%

[1]Multiple responses permitted.

PRE-VISIT

Recall of Lee County Promotions	April – June 2021	April – June 2022
Yes	41%	45%
No	44%	41%
Can't recall	15%	14%

Characteristics influencing decision to visit Lee County (top 2 boxes)	April – June 2021	April – June 2022
Peaceful/relaxing	95%	94%
Warm weather	92%	93%
A safe destination	91%	91%
White sandy beaches	89%	90%
Clean, unspoiled environment	86%	87%
Plenty to see and do	81%	84%
A "family" atmosphere	80%	82%
Convenient location	83%	81%
Reasonably priced lodging	78%	78%
Value for your travel dollar	78%	78%

PRE-VISIT

Transportation	April – June 2021	April – June 2022
Fly	77%	66%
Drive a personal vehicle	19%	31%
Drive a rental vehicle	2%	2%
Drive a RV	1%	1%
Travel by bus	1%	0%

Airport Used	April – June 2021	April – June 2022
Southwest Florida International	81%	84%
Punta Gorda	7%	6%
Ft. Lauderdale International	3%	4%
Miami International	3%	2%
Orlando International	3%	2%
Tampa International	2%	1%
Other	1%	1%

TRAVEL PARTY PROFILE

Visitor Origin[1]	April – June 2021	April – June 2022
Florida	15%	16%
Southeast	17%	18%
Northeast	15%	16%
Midwest	37%	33%
West	8%	7%
Canada	3%	4%
United Kingdom	1%	2%
Germany	1%	2%
Other Europe	1%	1%
Other International	2%	1%

Visitor Origin[1]	April – June 2021	April – June 2022
Miami – Ft. Lauderdale	6%	5%
Tampa – St. Petersburg	4%	5%
New York	3%	4%
Orlando - Daytona Beach	3%	3%
Atlanta	3%	3%
Minneapolis – St. Paul	4%	3%
Chicago	4%	3%
Boston	2%	3%
Detroit	3%	2%

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

[2]2021 data have been updated from the previous year's report to include Arrivalist data

TRAVEL PARTY PROFILE

Travel Parties	April – June 2021	April – June 2022
Mean travel party size	3.2[1]	3.2[1]
Travel with children under age 18	39%	41%

Travel Party Composition	April – June 2021	April – June 2022
Family	47%	44%
Couple	33%	34%
Group of couples/friends	13%	11%
Single	5%	8%
With business associates	1%	1%
In a tour group	1%	1%
Other	0%	1%

[1]Sources: Occupancy Study for visitors staying in paid accommodations and Visitor Tracking Survey for all other visitors
2021 data was updated to match the updated calculation method

TRAVEL PARTY PROFILE

Marital Status	April – June 2021	April – June 2022
Married	76%	73%
Single	24%	27%

Age	April – June 2021	April – June 2022
Average age	50	50

Household Income	April – June 2021	April – June 2022
Median Income	$104,400	$108,300

TRAVEL PARTY PROFILE

Race/Ethnicity	April – June 2021	April – June 2022
Caucasian or white	77%	79%
Hispanic	6%	10%
African American or black	5%	5%
Asian	3%	3%
Other	9%	3%

Gender	April – June 2021	April – June 2022
Female	52%	48%
Male	48%	52%

TRIP EXPERIENCE

Length of Stay	April – June 2021	April – June 2022
Average nights in the Fort Myers area	5.8[1]	5.6[1]

First Time/Repeat Visitors	April – June 2021	April – June 2022
First-time	30%	36%
Repeat	70%	64%

[1]Sources: Occupancy Study for visitors staying in paid accommodations and Visitor Tracking Survey for all other visitors
2021 data was updated to match the updated calculation method

TRIP EXPERIENCE

Activities[1]	April – June 2021	April – June 2022
Beach	78%	77%
Relax and unwind	70%	71%
Restaurants	54%	54%
Shopping	38%	41%
Visit friends/relatives	28%	31%
Biking, hiking	26%	28%
Nature, environment, bird watching	31%	27%
Water sports	31%	27%
Fishing	25%	23%
Bars, nightclubs	16%	17%
Photography	16%	16%
Attractions	13%	13%
Golf or tennis	9%	11%
Museums, history	9%	10%
Culture	8%	8%
Diving, snorkeling	8%	7%
Guided tours	8%	7%
Special occasion	5%	6%
Special events	6%	5%
Attend or participate in a sporting event	3%	4%
Spas	4%	4%
Business meetings/conferences	2%	3%
Volunteering	2%	1%
Other	2%	2%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Attractions[1]	April – June 2021	April – June 2022
Beaches	78%	79%
Fort Myers Beach Pier	36%	43%
Sanibel Lighthouse	32%	31%
Sanibel Outlets	17%	20%
Edison & Ford Winter Estates	15%	16%
J.N. Ding Darling National Wildlife Refuge	17%	16%
Periwinkle Place	18%	16%
Shell Factory and Nature Park	11%	14%
Miromar Outlets Mall	11%	13%
Bell Tower Shops	10%	12%
Coconut Point Mall	10%	11%
Gulf Coast Town Center	9%	10%
Bailey-Matthews Shell Museum	9%	7%
Manatee Park	6%	5%
Broadway Palm Dinner Theater	3%	3%
Barbara B. Mann Performing Arts Hall	2%	2%
Other	4%	5%
None	7%	7%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Area stayed	April – June 2021	April – June 2022
Sanibel Island	29%	25%
Fort Myers Beach	25%	21%
Fort Myers	14%	20%
Cape Coral	11%	13%
Bonita Springs	5%	6%
Estero	3%	4%
Captiva Island	4%	3%
North Fort Myers	1%	2%
Lehigh Acres	1%	1%
Pine Island	1%	1%
Along I-75	1%	1%
Boca Grande/Outer Islands	1%	0%
None/not staying overnight	4%	3%

POST-TRIP EVALUATION

Loyalty Metrics	April – June 2021	April – June 2022
Likely to recommend	96%	95%
Likely to return	89%	87%
Likely to return next year	56%	59%

Satisfaction with Accommodations	April – June 2021	April – June 2022
Exceeded expectations	40%	39%
Met expectations	56%	57%
Did not meet expectations	4%	4%

POST-TRIP EVALUATION

Satisfaction with Visit	April – June 2021	April – June 2022
Very satisfied	72%	62%
Satisfied	25%	35%
Somewhat satisfied	2%	2%
Dissatisfied	1%	1%
Very dissatisfied	0%	0%
Don't know/no opinion	0%	0%

Satisfaction with Customer Service	April – June 2021	April – June 2022
Very satisfied	65%	59%
Satisfied	28%	34%
Somewhat satisfied	4%	5%
Dissatisfied	3%	1%
Very dissatisfied	0%	0%
Don't know/no opinion	0%	1%

POST-TRIP EVALUATION

Visitor Concerns[1]	April – June 2021	April – June 2022
Traffic	21%	36%
Beach seaweed	48%	20%
High Prices	12%	19%
Insects	7%	17%
Water quality	14%	10%
Weather	20%	9%
Lack of nightlife	9%	7%
Red tide	12%	6%
Quality of accommodations	13%	5%
Nothing	18%	25%
Other	11%	6%

[1]Multiple responses permitted.

Methodology

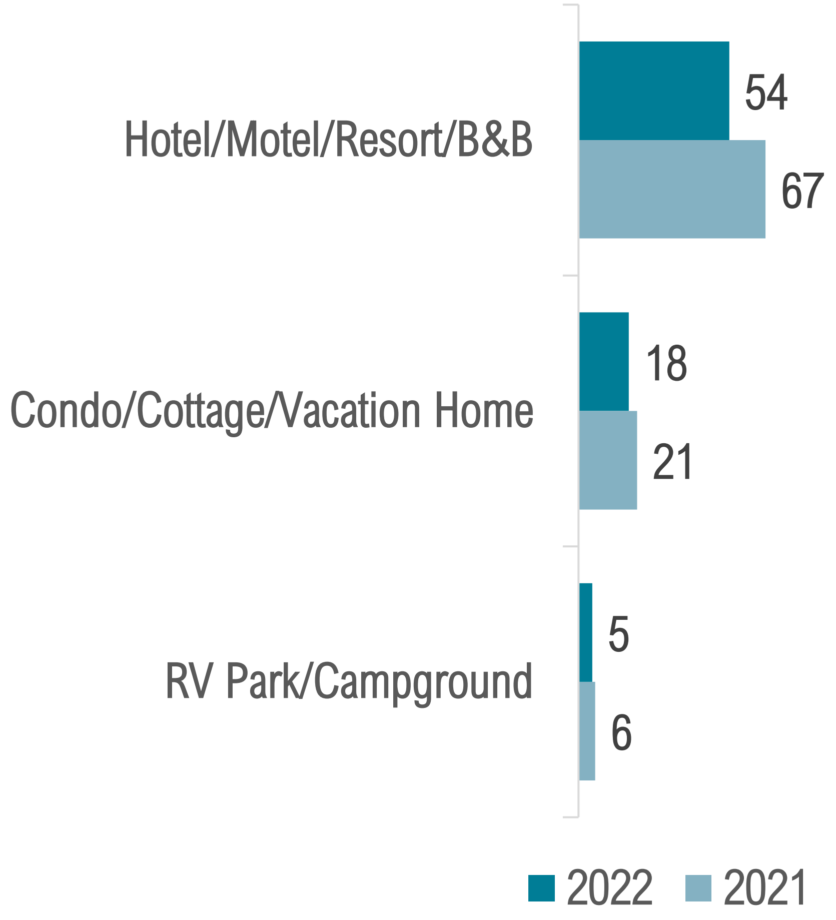
METHODOLOGY

- Economic Impact of tourism in Lee County is derived from:
  - Visitor Tracking Study
    - Internet survey & in-person interviews in public areas, hotels, & at events around Lee County
    - Sample size: 1,077 completed interviews
    - Target individuals: April – June visitors to Lee County
    - Data Collection: April 2022 – June 2022
  - Occupancy Study
    - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc., and the STR Report
    - Sample Size – data from 6,224 hotel/rental/campground units (77 properties) reporting to DSG,10,384 hotel units reporting to STR (86 properties), and 2,378 rental units reporting to 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 including Florida Department of Business and Professional Regulation
  - 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 – 77 completed interviews
    - Data Collection: Completed in July 2022 (for April - June 2022)
  - Total Sample Size – data from 6,224 hotel/rental/campground units reporting to DSG, 10,384 hotel units reporting to STR (representing 86 properties), and 2,378 rental units reporting to Key Data

Number of Interviews



METHODOLOGY

- **1,077** visitor interviews were completed in the following areas:

282	Fort Myers Beach: The Pier, Times Square
403	Fort Myers: Centennial Park, RSW, Edison-Ford Winter Estates, Hampton Inn & Suites Fort Myers
214	Sanibel: Lighthouse Beach, Sanibel Moorings Resort
130	Cape Coral/North Fort Myers: Yacht Club Community Park
48	Bonita Springs: Bonita Beach, Estero

Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

April – June 2022

Visitor Tracking, Occupancy, & Economic Impact Study

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fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

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