# Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

July - September 2022

Visitor Tracking, Occupancy & Economic Impact Study

fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

downs & st. germain RESEARCH

# Introduction

# STUDY OBJECTIVES: MAP THE VISITOR JOURNEY

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

## Travel Party Profile
- Visitor origin
- Party size
- Party composition
- Demographics

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

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

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

# Executive Summary

# QUARTERLY SNAPSHOT

## July - September 2022

- Direct spending by visitors increased more than the number of visitors this quarter, resulting in a **higher yield of spending per visitor (+7%)**
- Visitors **used more online resources** and had **more information requests**
- More visitors **traveled with children (+7% points)**
- More visitors **recalled noticing advertising (+13% points)** about the area prior to their trip
- There were more **international visitors** compared to July-September 2021 and April-June 2022
- Higher than normal inflation led to **lower ratings regarding value per travel dollar, lodging prices, and satisfaction levels** compared to 2021 – yet most are visitors are just as likely to recommend the area

| 55.2% | $151.82 | $83.80 |
|---|---|---|
| OCCUPANCY RATE | AVERAGE DAILY RATE | REVENUE PER ROOM |
| ↓ 1.1% from 2021 | ↑ 8.9% from 2021 | ↑ 7.8% 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 JULY – SEPTEMBER 2021 VS. 2022

| Visitor & Lodging Statistics | July - Sept 2021 | July - Sept 2022 | % Change '21-'22 |
|---|---|---|---|
| Visitors[1] | 1,162,800 | 1,199,100 | + 3.1% |
| Room Nights[1] | 1,294,000 | 1,457,300 | + 12.6% |
| Direct Expenditures[2] | $767,613,500 | $854,982,500 | +11.4% |
| Total Economic Impact[3] | $1,223,575,900 | $1,361,987,100 | +11.4% |

[1] Visitors and room nights are up largely due to increases in TP Size and LOS, but also in part due to our utilization of 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 | 3,385,900 | 3,802,700 | + 12.3% |
| Room Nights | 4,614,800 | 5,192,000 | + 12.5% |
| Direct Expenditures[1] | $2,770,395,800 | $3,472,095,800 | + 25.3% |
| Total Economic Impact[2] | $4,416,010,900 | $5,531,048,600 | + 25.3% |

[1] Includes: accommodations, restaurants, entertainment, shopping, transportation, groceries, and "other" expenses.
[2] Economic impact includes indirect and induced effects of visitor spending. Indirect effects are increased business spending resulting from tourism dollars. Induced effects are increased household spending resulting from tourism dollars.

# JULY – SEPTEMBER LODGING STATISTICS

| 55.2% | $151.82 | $83.80 |
|---|---|---|
| Occupancy | ADR | RevPAR |
| ↓ 1.1% | ↑ 8.9% | ↑ 7.8% |
| From 2021 | From 2021 | From 2021 |

# VISITOR JOURNEY: PRE-VISIT

**Pre-Visit**

Travel Party Profile

Trip Experience

Post-Trip Evaluation

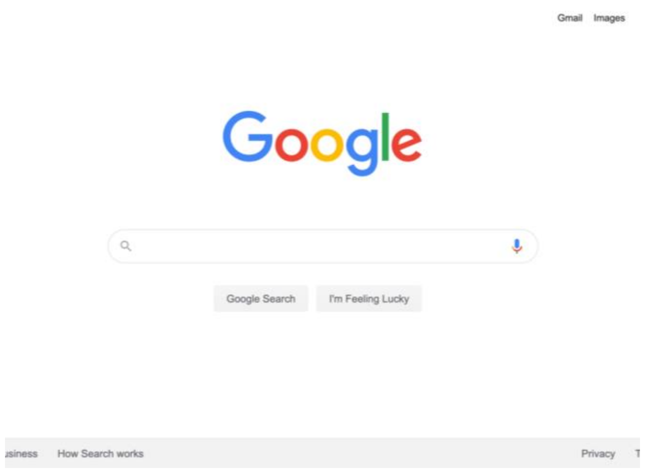
Economic Impact on Destination

# TRIP PLANNING

- 2 in 5 of visitors planned their trips to the Fort Myers area 1-2 months in advance
- Nearly 3 in 5 visitors requested information to plan their trips
  - Almost half called a hotel, motel, or condo when planning their trips
- 54% of visitors considered choosing other destinations when planning their trips

# TRIP PLANNING: WEBSITES/APPS USED

- More than 9 in 10 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]:




38% Search engines

34% Airline websites/apps

airbnb

24% Airbnb, VRBO, HomeAway, or similar websites

[1]Multiple responses permitted.

# TOP TRIP INFLUENCERS

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

96% Peaceful/relaxing

93% Safe destination

91% Warm weather

91% White sandy beaches

[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.

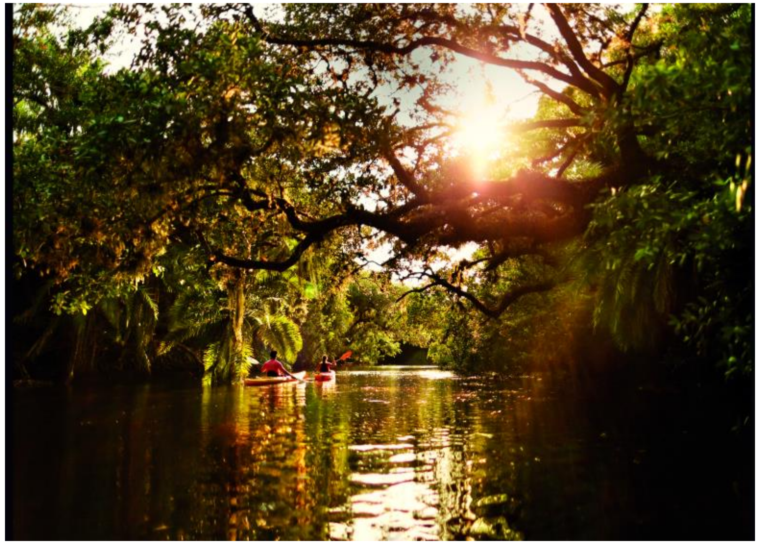
# TOP REASONS FOR VISITING



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

69% Vacation

66% Beach



38% Relax & unwind

[1]Three responses permitted.

# PROMOTIONS

- 55% of visitors recalled promotions in the past 6 months for the Fort Myers area
- 29% of all visitors were influenced to come to the Fort Myers area by these promotions
- Top sources of recall include[1]:

66% Internet


36% Social media

34% Traveler reviews, blogs

[1]Multiple responses permitted.

# BOOKING

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

37% Directly with hotel/condo

25% Other online travel agency

18% VRBO, HomeAway

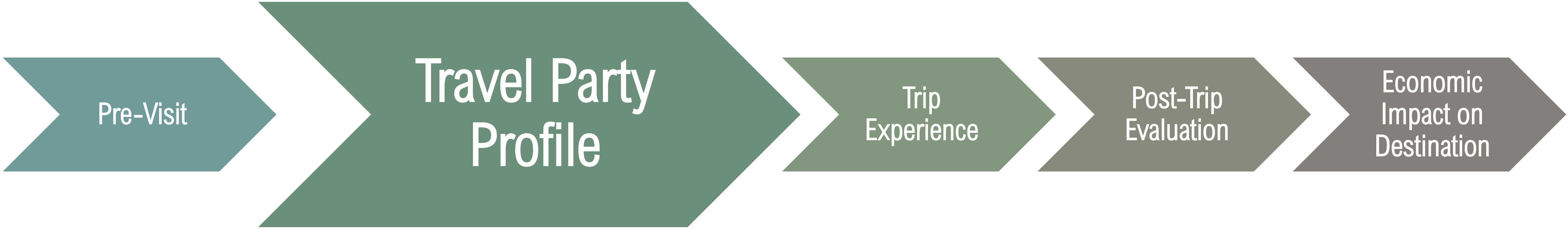
10% Airbnb

7% Vacation rental company

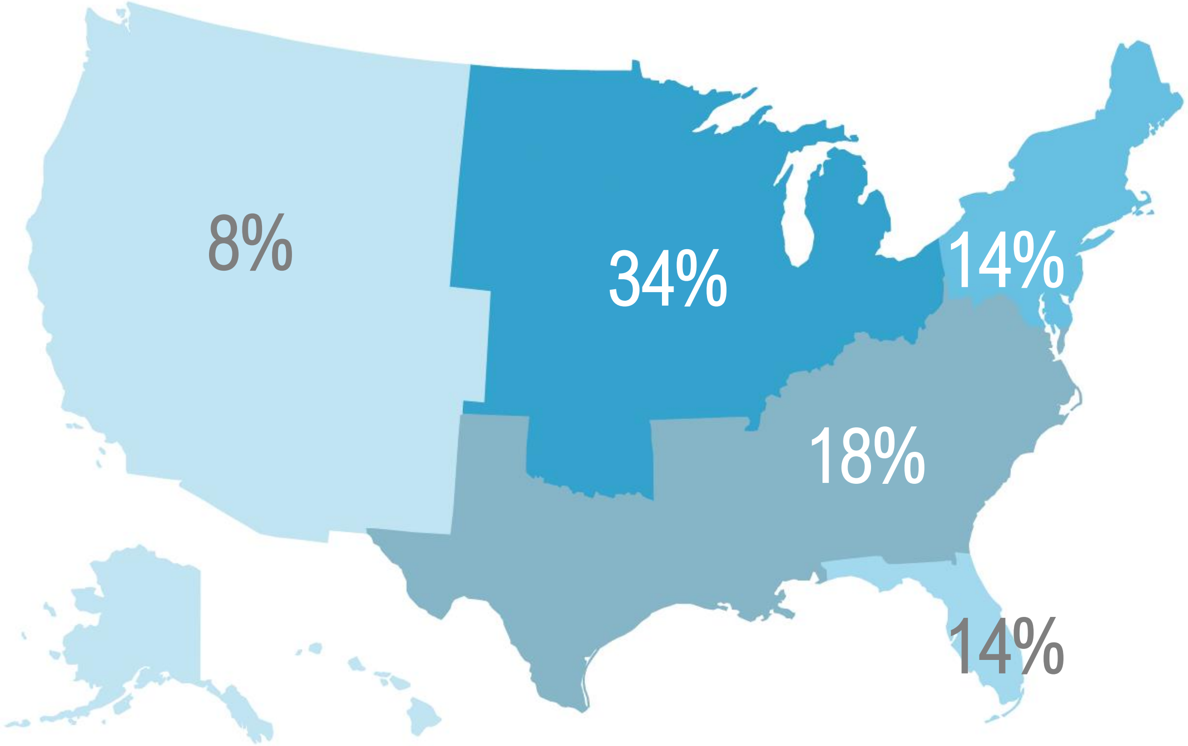
# TRANSPORTATION

- 78% of visitors flew to the Fort Myers area
- 66% of all visitors traveled to the Fort Myers area via RSW

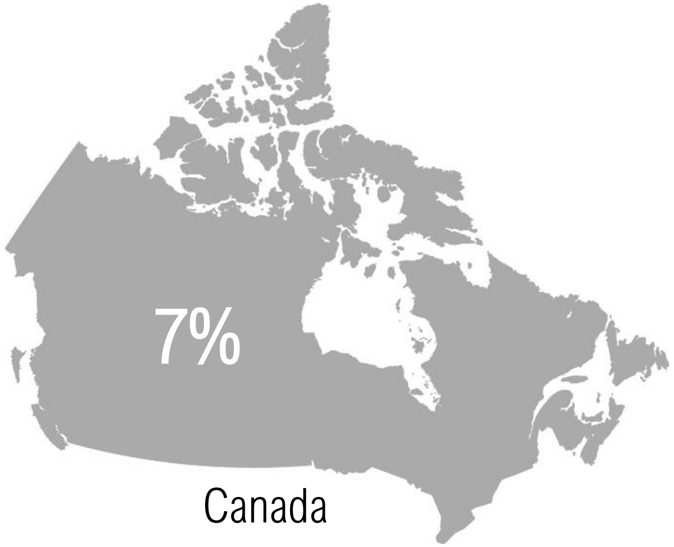
# VISITOR JOURNEY: TRAVEL PARTY PROFILE



# ORIGIN REGION[1]




US = 88%




Canada

5% Other International Markets

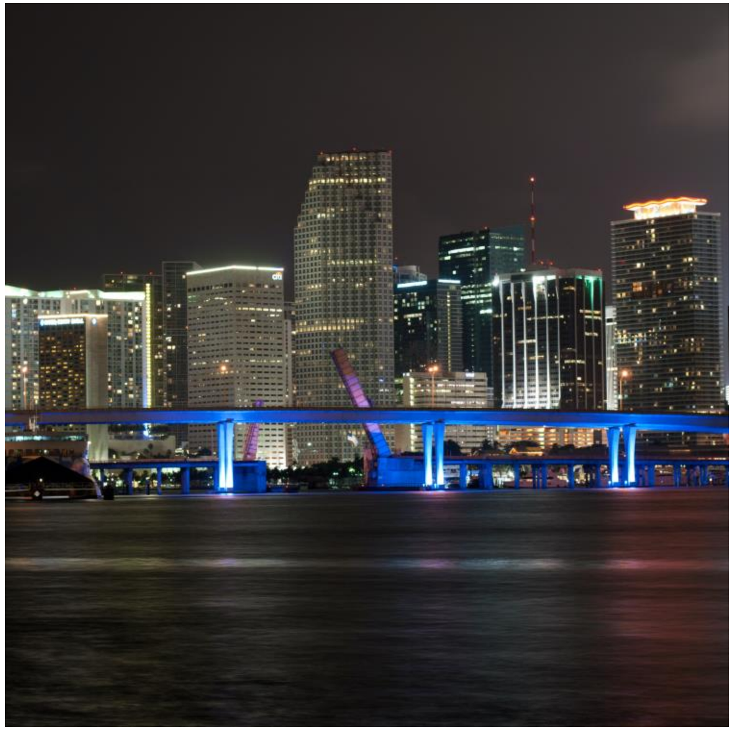
[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers. Based on the Visitor Tracking Study and supplemental data from Arrivalist.

fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS



downs & st. germain RESEARCH

# TOP ORIGIN MARKETS[1]



6% Miami – Ft. Lauderdale


4% Chicago

4% Cleveland – Akron

[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]
- 56% traveled with children under the age of 18
- 64% traveled as a family, while nearly 1 in 4 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

## July - September Visitors:

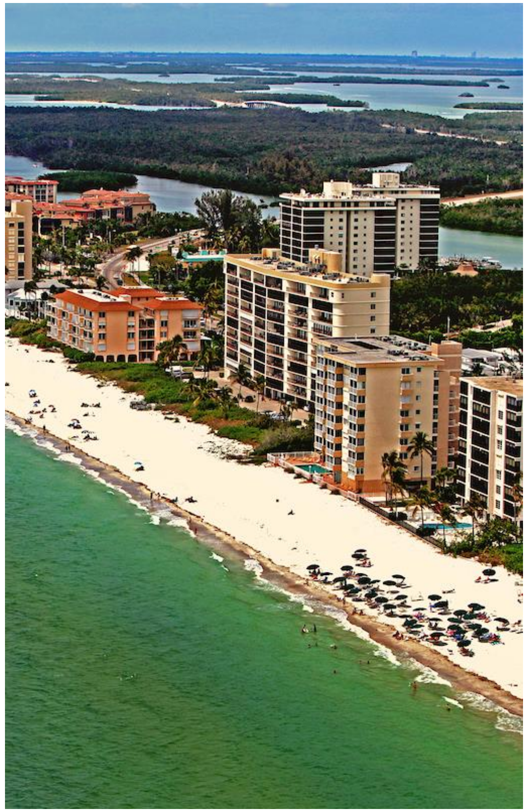
- Average age of 52 years old
- Median household income of $108,600
- Married (69%)
- College educated (67%)
- Caucasian/white (78%)
- Male[1] (54%)

[1]Gender of person interviewed.

# Visitor Journey: Trip Experience

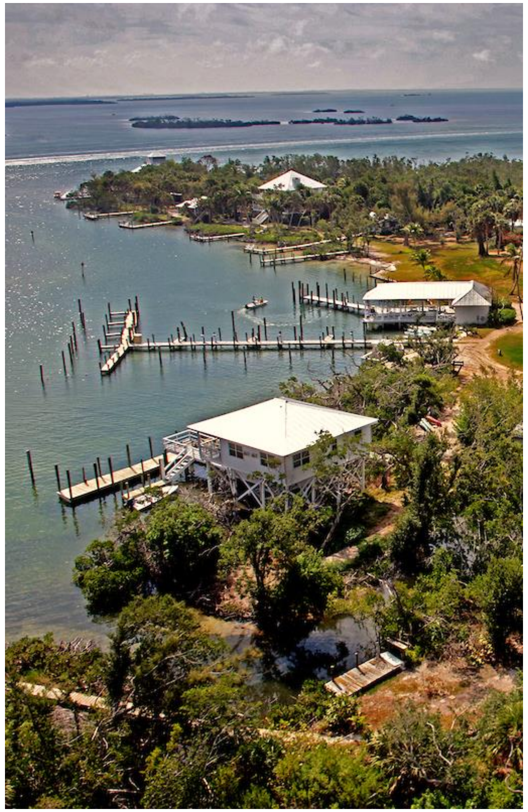
- Pre-Visit
- Travel Party Profile
- **Trip Experience**
- Post-Trip Evaluation
- Economic Impact on Destination

# TOP ACCOMMODATIONS



39% Hotel/Motel/Resort/B&B

36% Condo/Vacation Rental



22% Non-paid Accommodations

# LENGTH OF STAY & NUMBER OF TIMES IN DESTINATION

- Visitors[1] spent an average of 5.2 nights in the Fort Myers area
- 42% were first time visitors
- 11% 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]:

65% Beaches

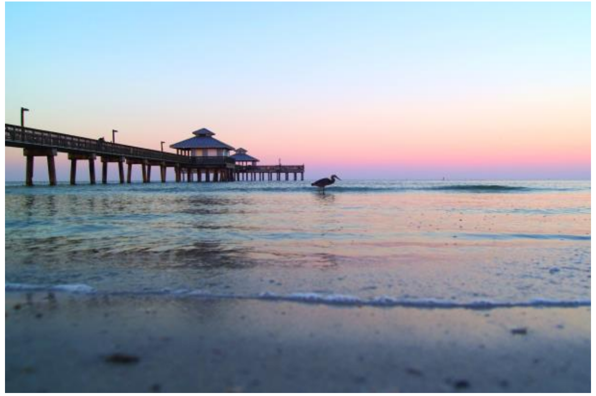
64% Relax & unwind

53% Dining

[1]Multiple responses permitted.

# TOP ATTRACTIONS VISITED[1]

64% Beaches



42% Fort Myers Beach Pier

31% Sanibel Lighthouse

[1]Multiple responses permitted.

# TOP COMMUNITIES STAYED



36% Fort Myers Beach

27% Sanibel Island

11% Cape Coral

11% Fort Myers

# VISITOR JOURNEY: POST-TRIP EVALUATION

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

# SATISFACTION

- 93% of visitors are likely to recommend the Fort Myers area
- 87% of visitors are likely to return
- 56% of visitors are likely to return next year

# SATISFACTION


- 94% of visitors were satisfied or very satisfied with their overall visit to the Fort Myers area (51% were very satisfied)
- 91% of visitors were satisfied or very satisfied with customer service on their visit (49% were very satisfied)
- 36% of visitors said paid accommodations exceeded their expectations (93% met or exceeded expectations)

# TOP ATTRIBUTE RATINGS

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

97% Warm weather

97% Peaceful/relaxing

96% A safe destination

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

# VISITOR CONCERNS

- 3 in 10 visitors were concerned about high prices in the Fort Myers area
- About 1 in 5 were concerned about traffic or insects
- Over 1 in 4 visitors had no concerns at all about the destination

# AREA DESCRIPTIONS

## Beautiful Beaches

*"It is like heaven on earth. The sand is soft, the water is warm, and the sunsets cannot be beat."*

## Wonderful Place to Visit

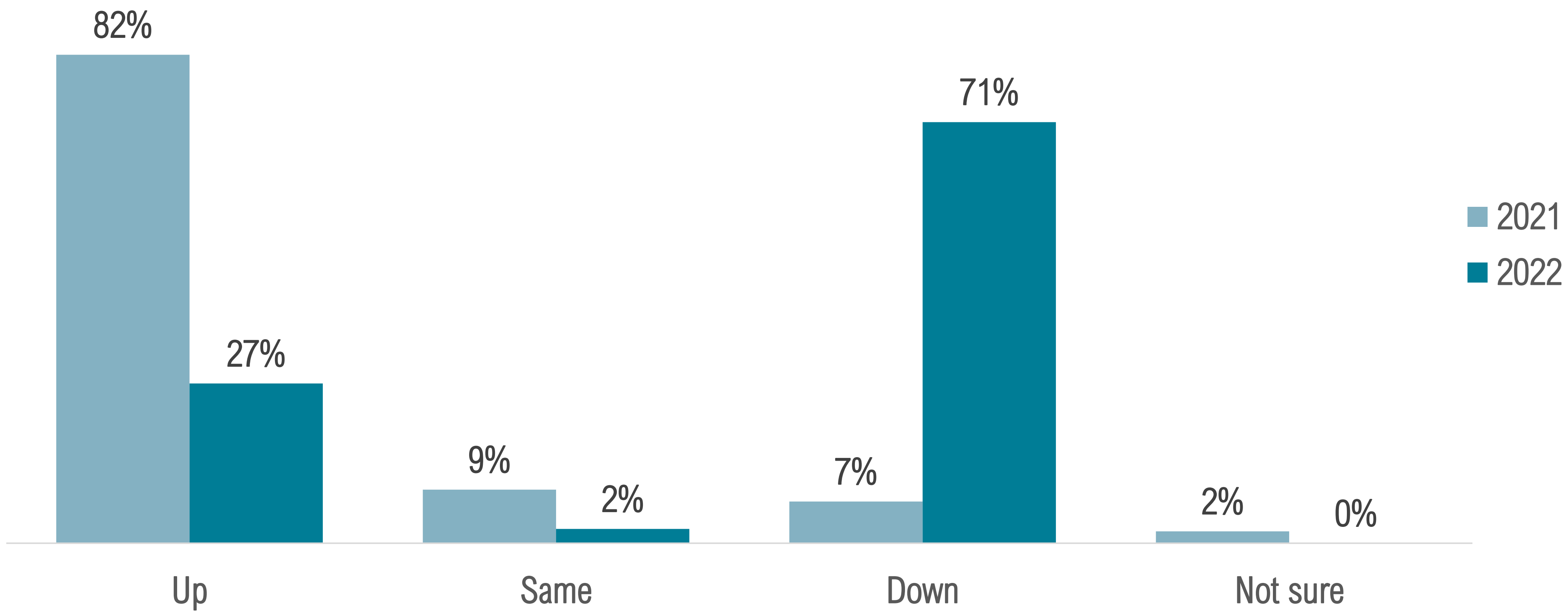
*"The Fort Myers and Sanibel area is a wonderful place to relax with family and friends of all ages. Plenty to do or just relax, which ever you want to do."*

## Warm Weather



*"Always a tremendous vacation in our favorite area to visit. The weather is perfect, and the water is phenomenal with plenty to see and do."*

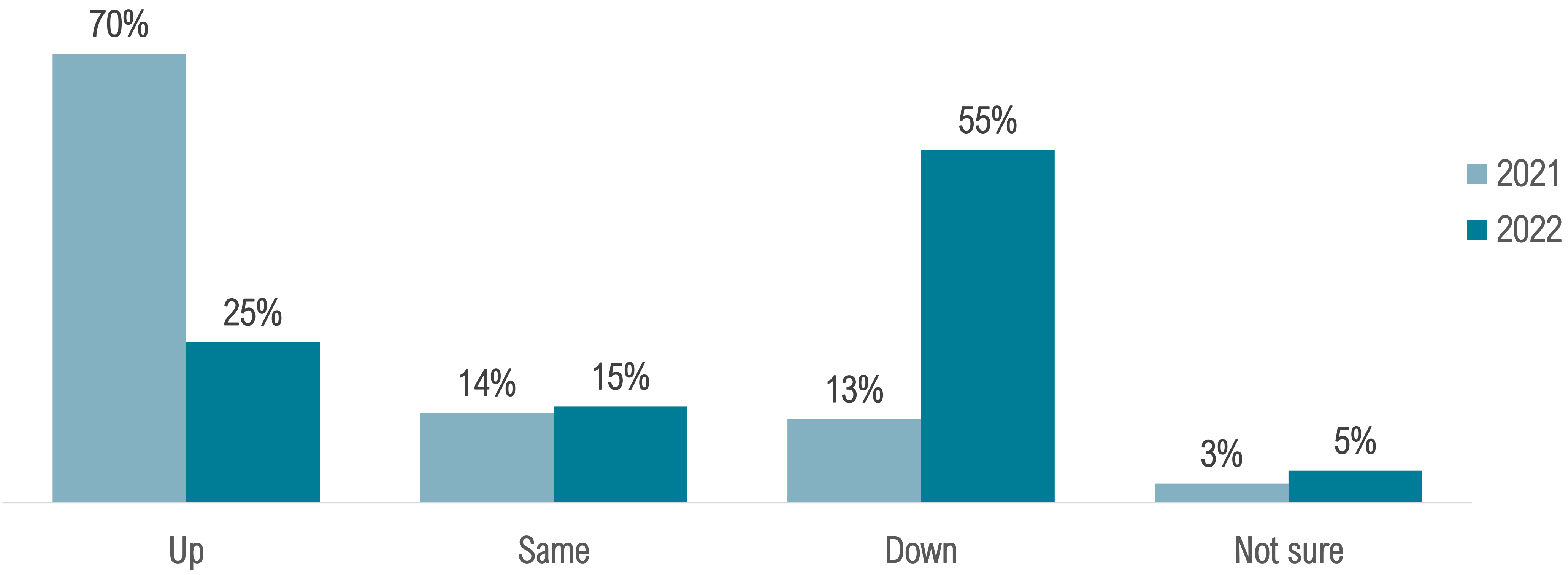
# OCCUPANCY BAROMETER[1]: OCT – DEC RESERVATIONS




[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?"

# OCCUPANCY BAROMETER[1]: JAN – MAR RESERVATIONS




[1]Sources: Occupancy Survey

Accommodations partners were asked the following, “Please think about your reservations for the next three months. Compared to January through March of 2022, would you say the total level of reservations are up, the same, or down?”

# Detailed Findings

# VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

Pre-Visit

Travel Party Profile

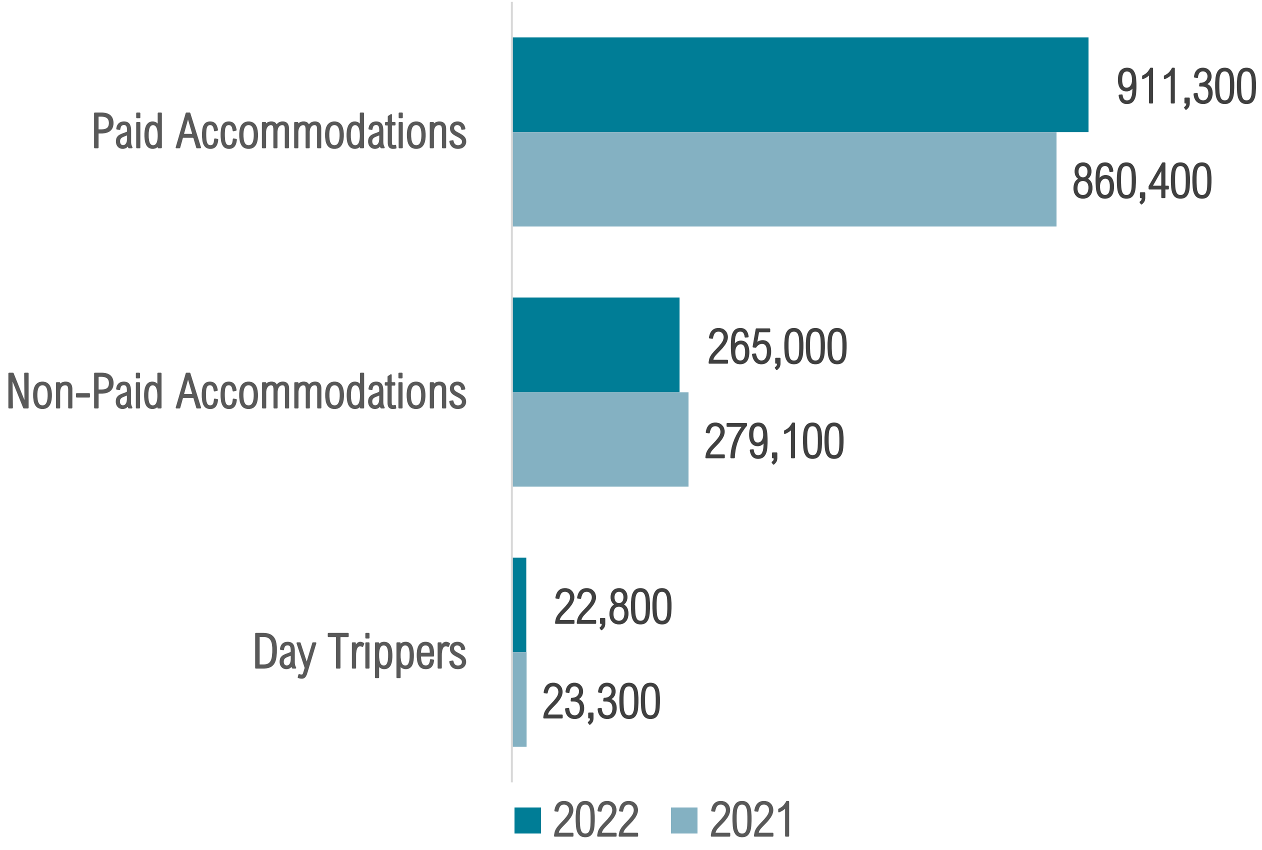
Trip Experience

Post-Trip Evaluation

**Economic Impact on Destination**

# NUMBER OF VISITORS

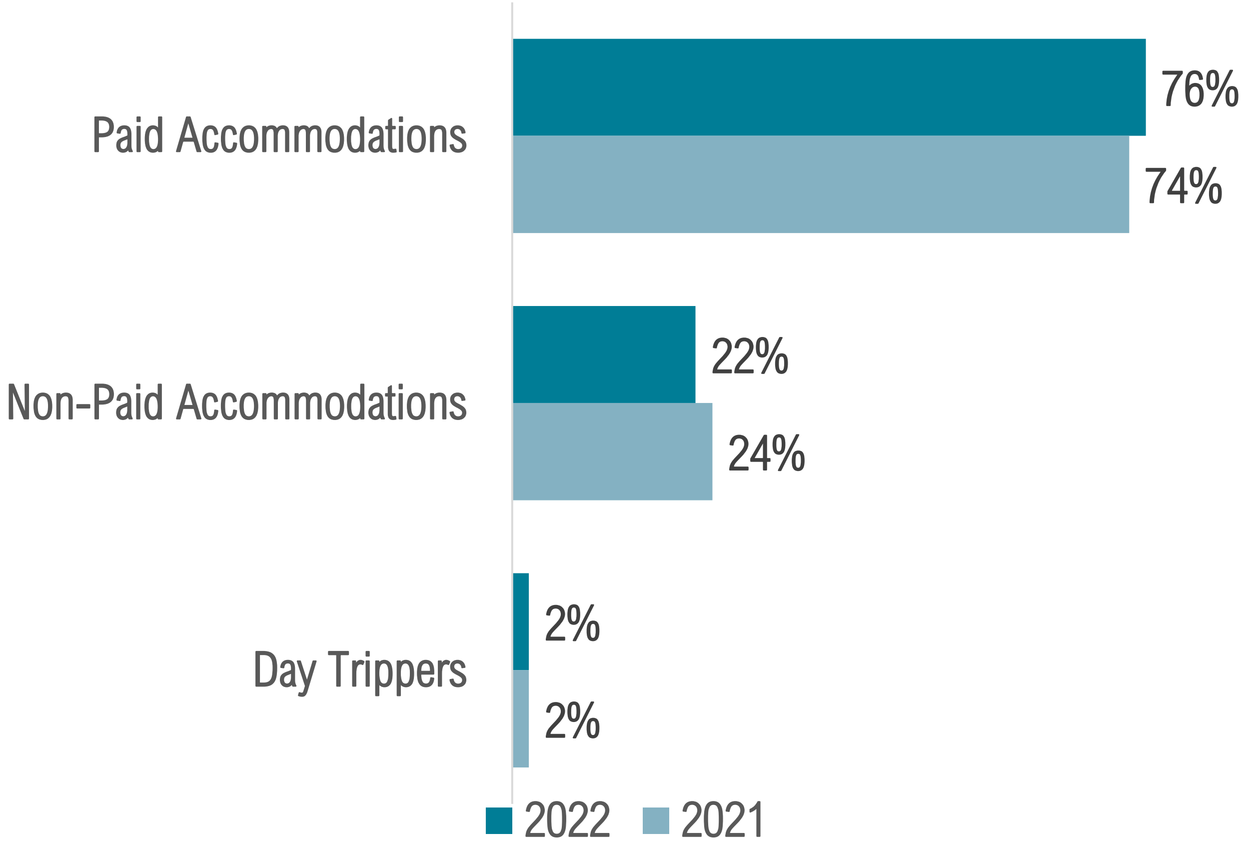
There were 1,199,100[1] visitors to the Fort Myers area in July - September 2022 (+3.1% from 2021).




[1]Sources: Visitor Tracking Study & Occupancy Survey

# VISITOR TYPE

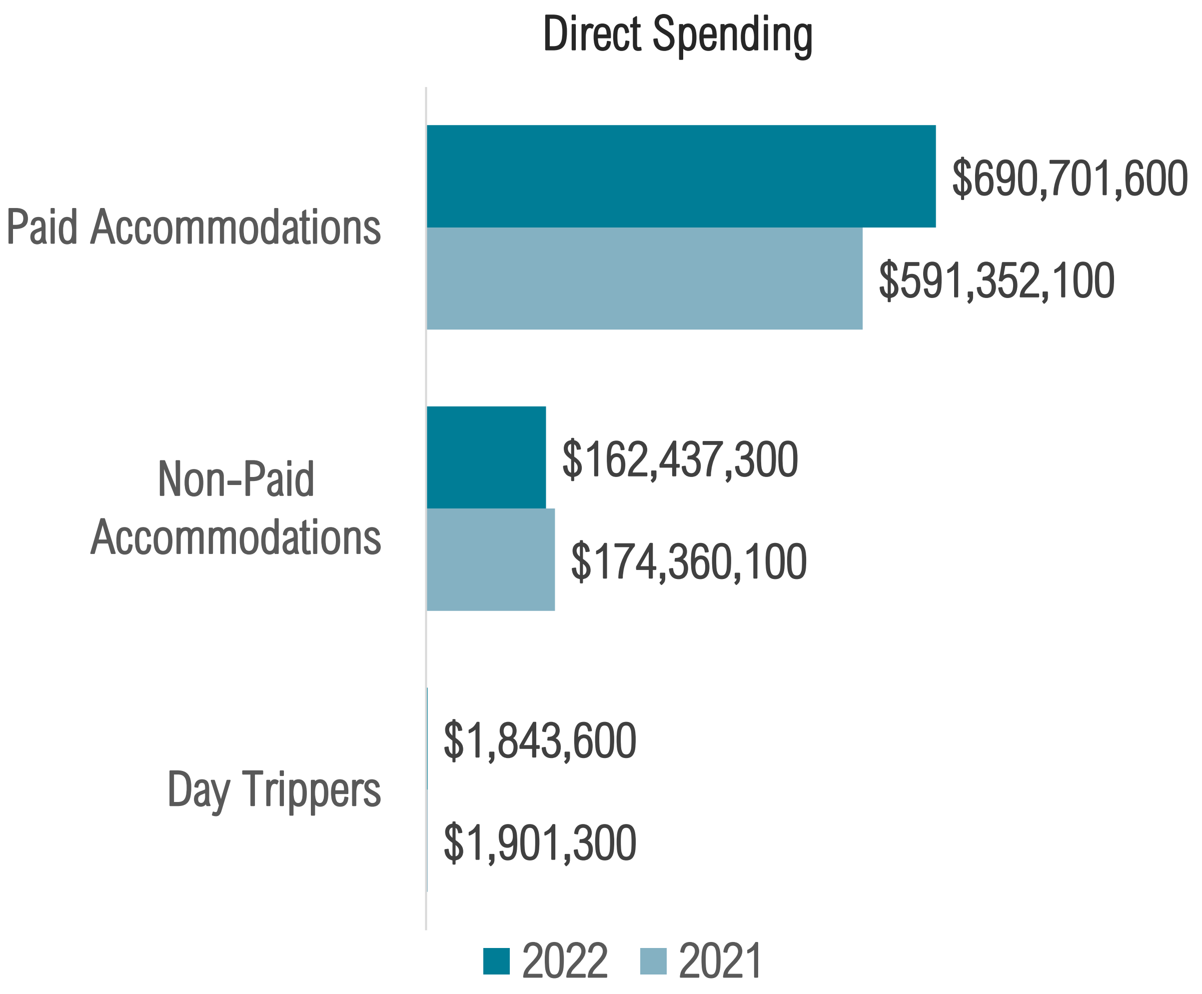
Visitors staying in paid accommodations accounted for just over 3 in 4 visitors.



# VISITOR EXPENDITURES BY VISITOR TYPE

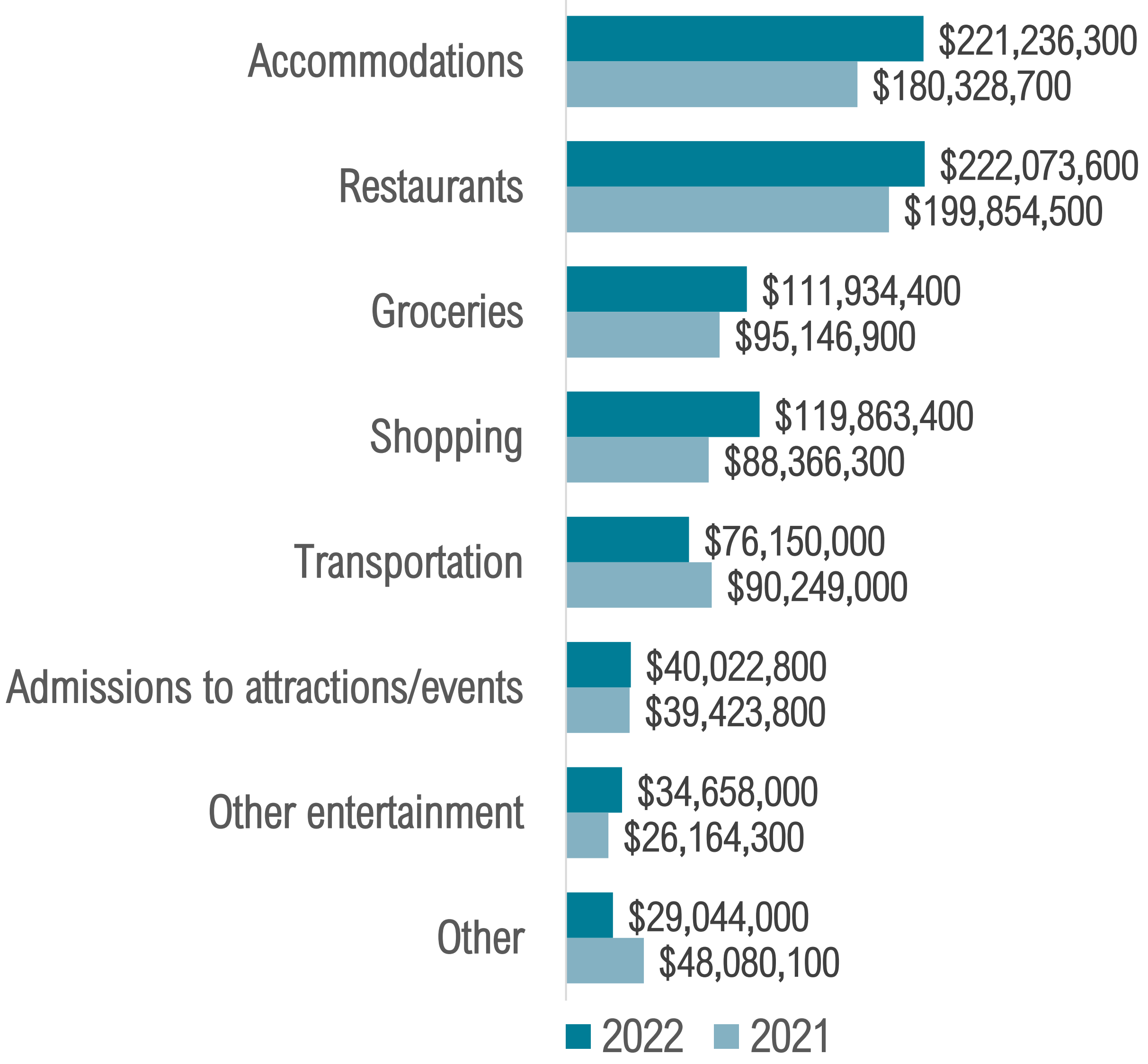
July - September visitors spent $854,982,500 in the Fort Myers area, resulting in a total economic impact of $1,361,987,100, up 11.4% from 2021.

Visitors staying in paid accommodations accounted for 76% of all visitors and 81% of all spending



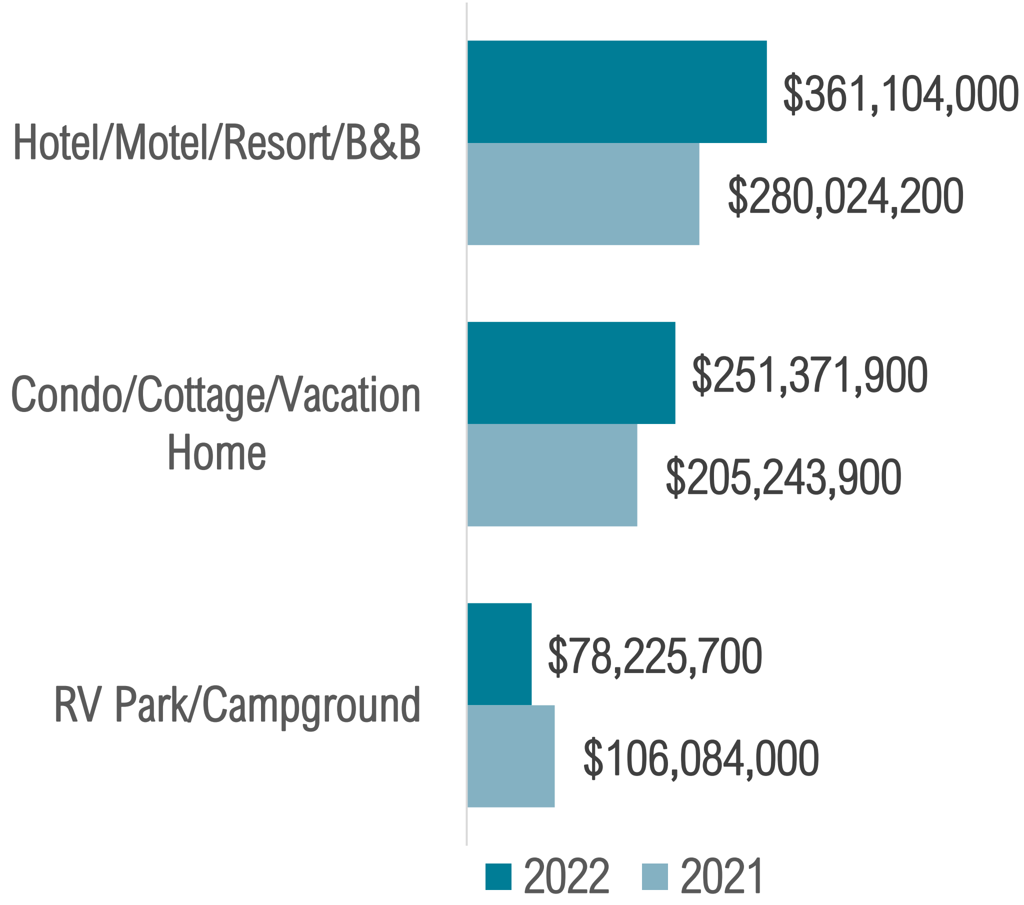
# VISITOR EXPENDITURES BY SPENDING CATEGORY

Of the $854,982,500 visitors spent in the Fort Myers area, 26% was spent on accommodations and 26% was spent on restaurants, accounting for 52% of all visitor spending.



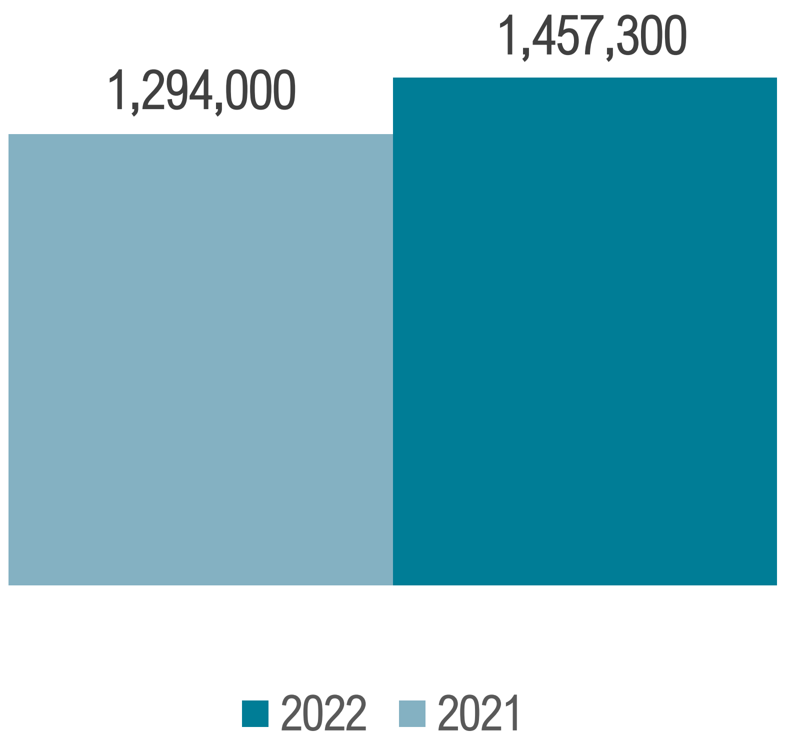
# VISITOR EXPENDITURES BY LODGING TYPE

July - September visitors staying in paid accommodations spent $690,701,600 in the Fort Myers area.



# ROOM NIGHTS GENERATED

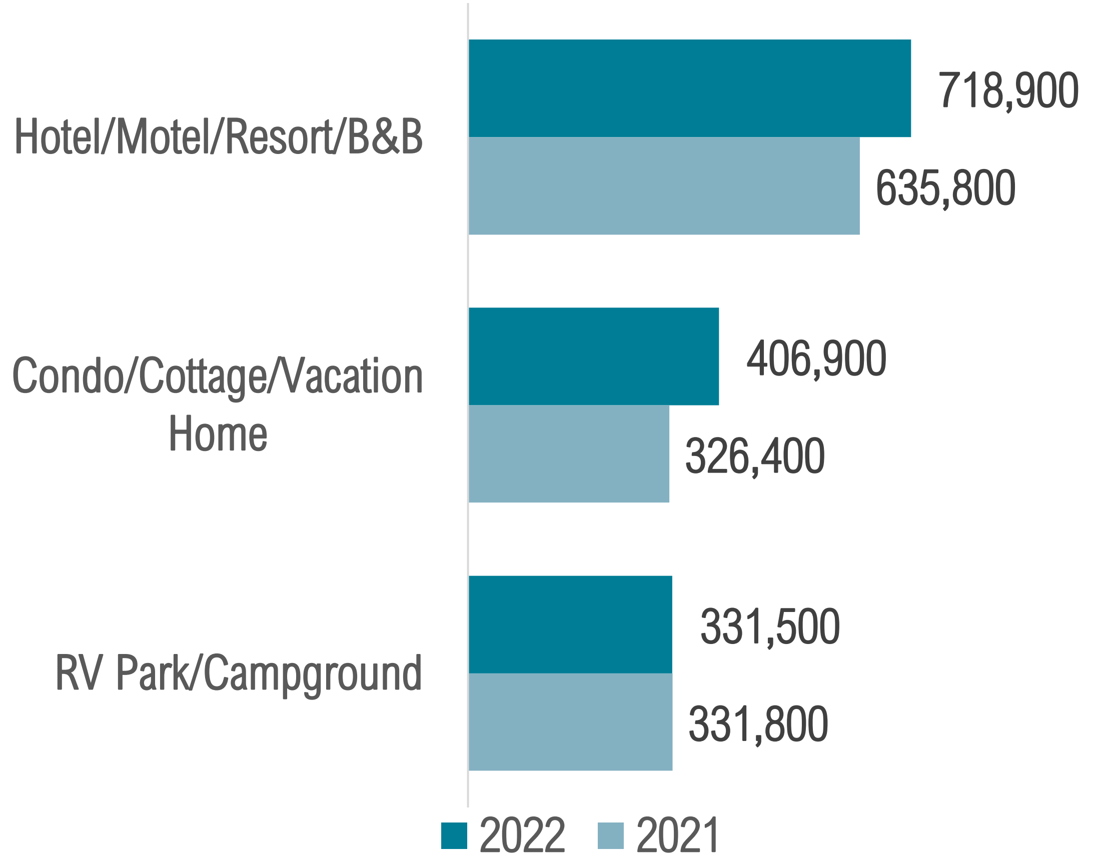
July - September visitors spent 1,457,300[1] nights in Fort Myers area hotels, resorts, condos, rental houses, etc. (+12.6% from 2021).




[1]Source: Occupancy Survey

# ROOM NIGHTS GENERATED

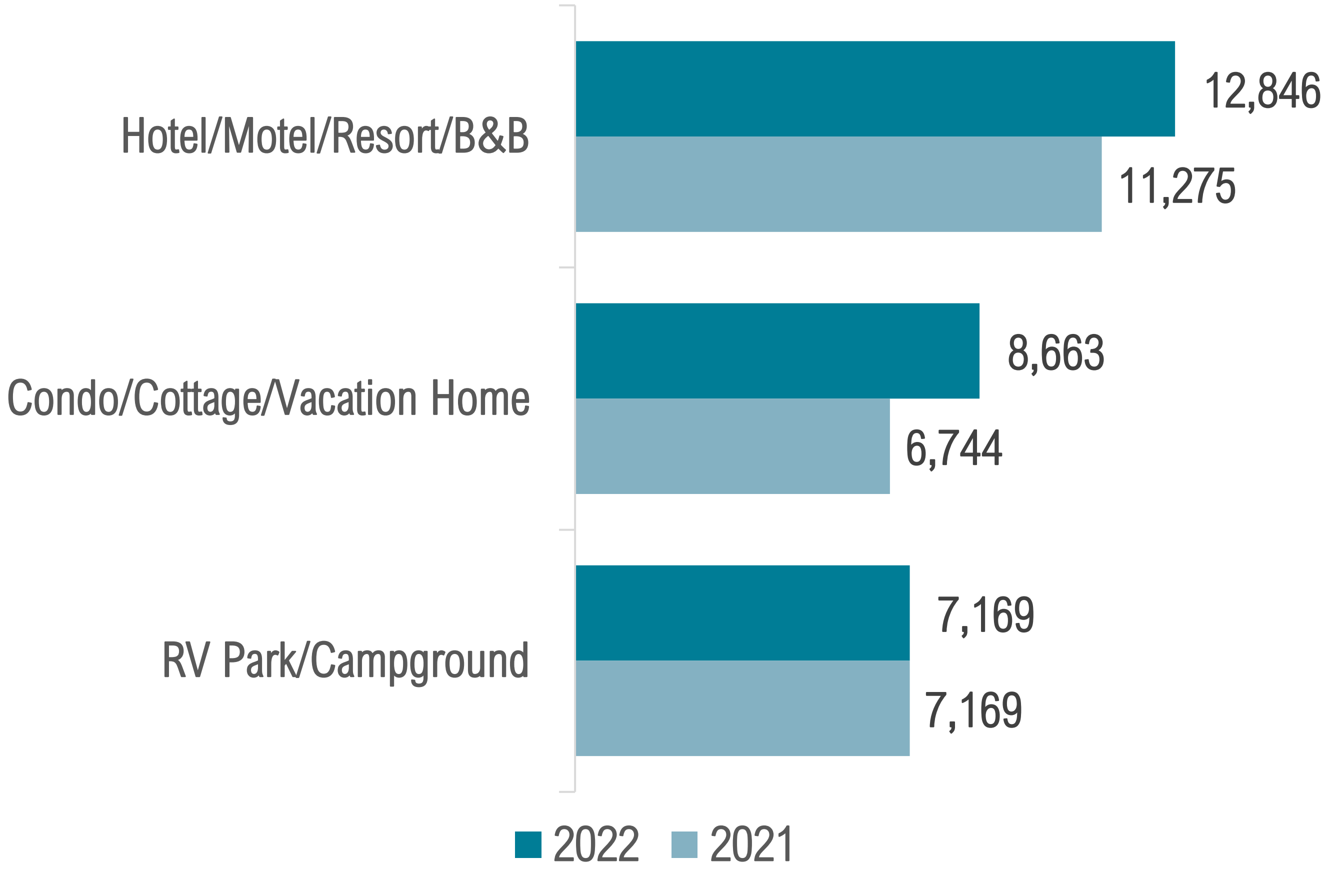
Hotels, motels, etc. accounted for nearly **half** the nights spent in the Fort Myers area, while vacation rentals accounted for over **1 in 4** nights visitors spent in the area.




[1]Source: Occupancy Survey

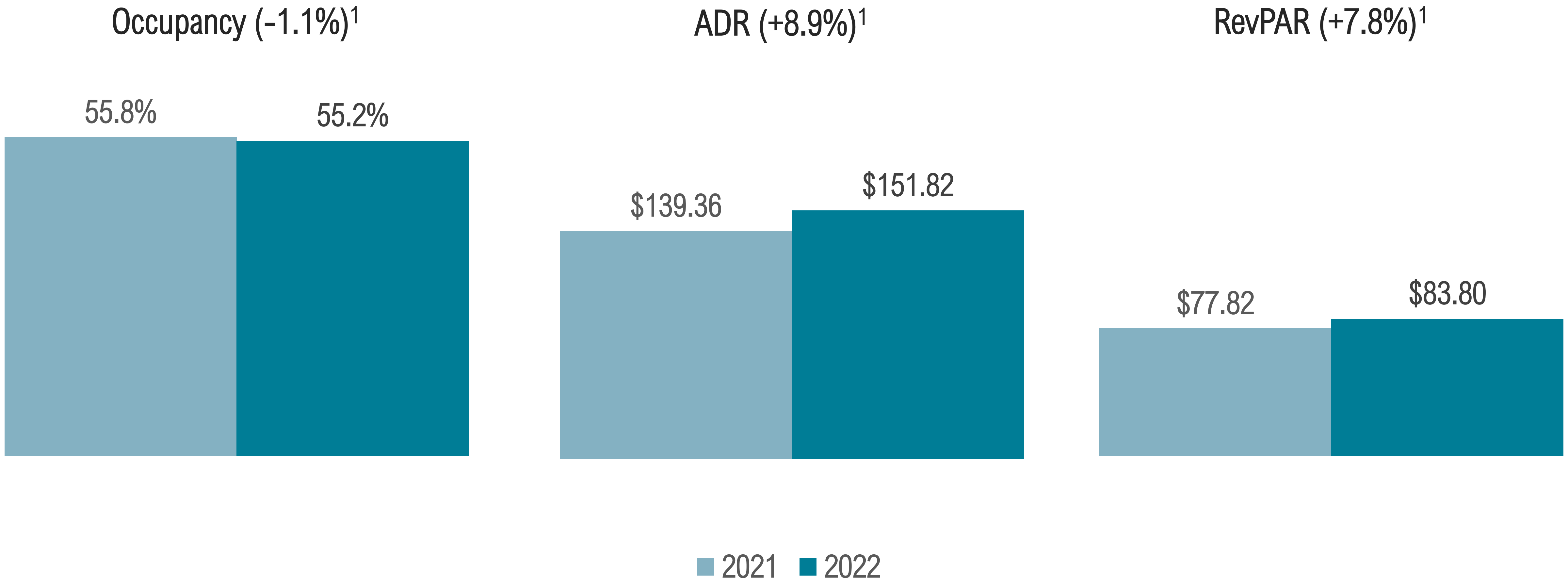
# AVAILABLE UNITS

There were **28,678**[1] available units in July - September 2022 vs. 25,188 in 2021 (+13.8%). Nearly half of the units were hotels, motels, etc.




[1]Source: Occupancy Survey

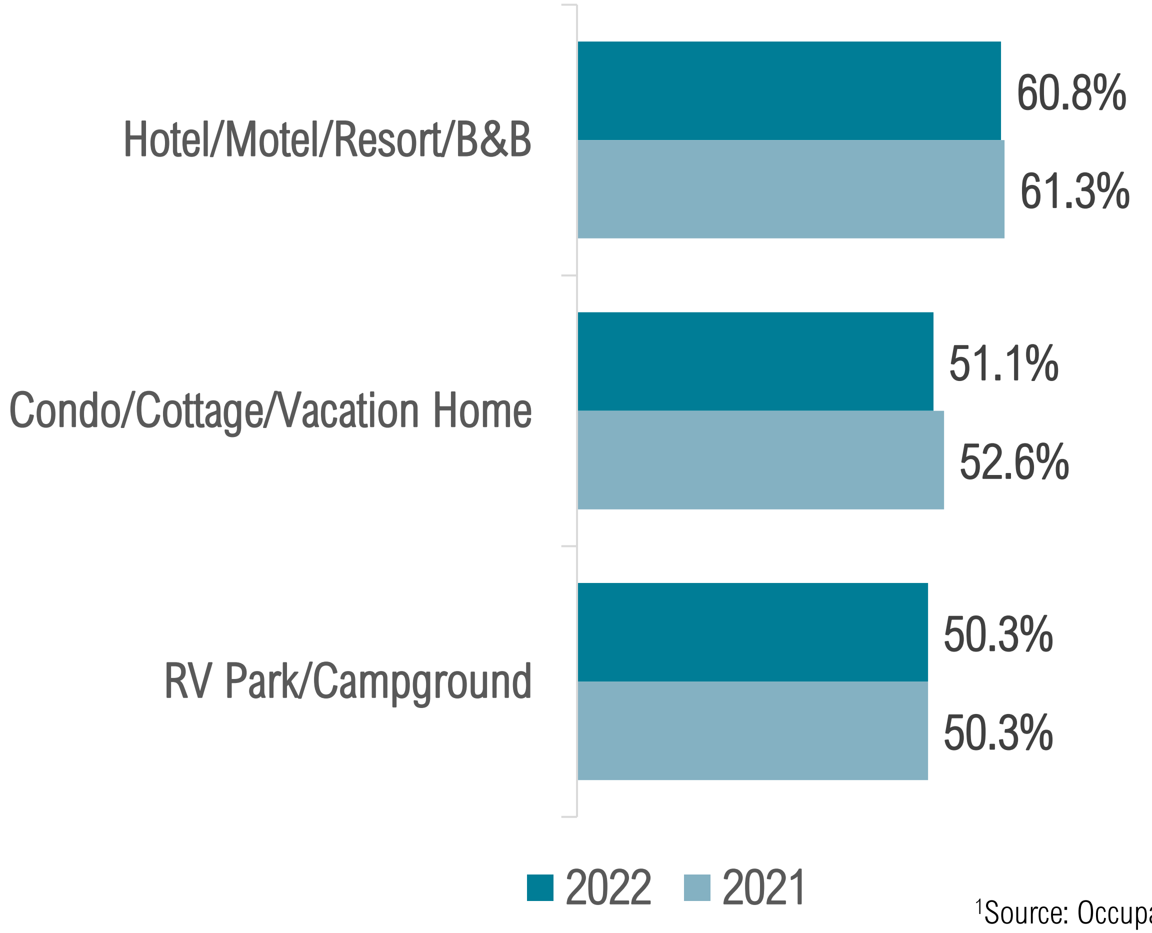
# OCCUPANCY, ADR AND REVPAR




[1]Source: Occupancy Survey

# OCCUPANCY

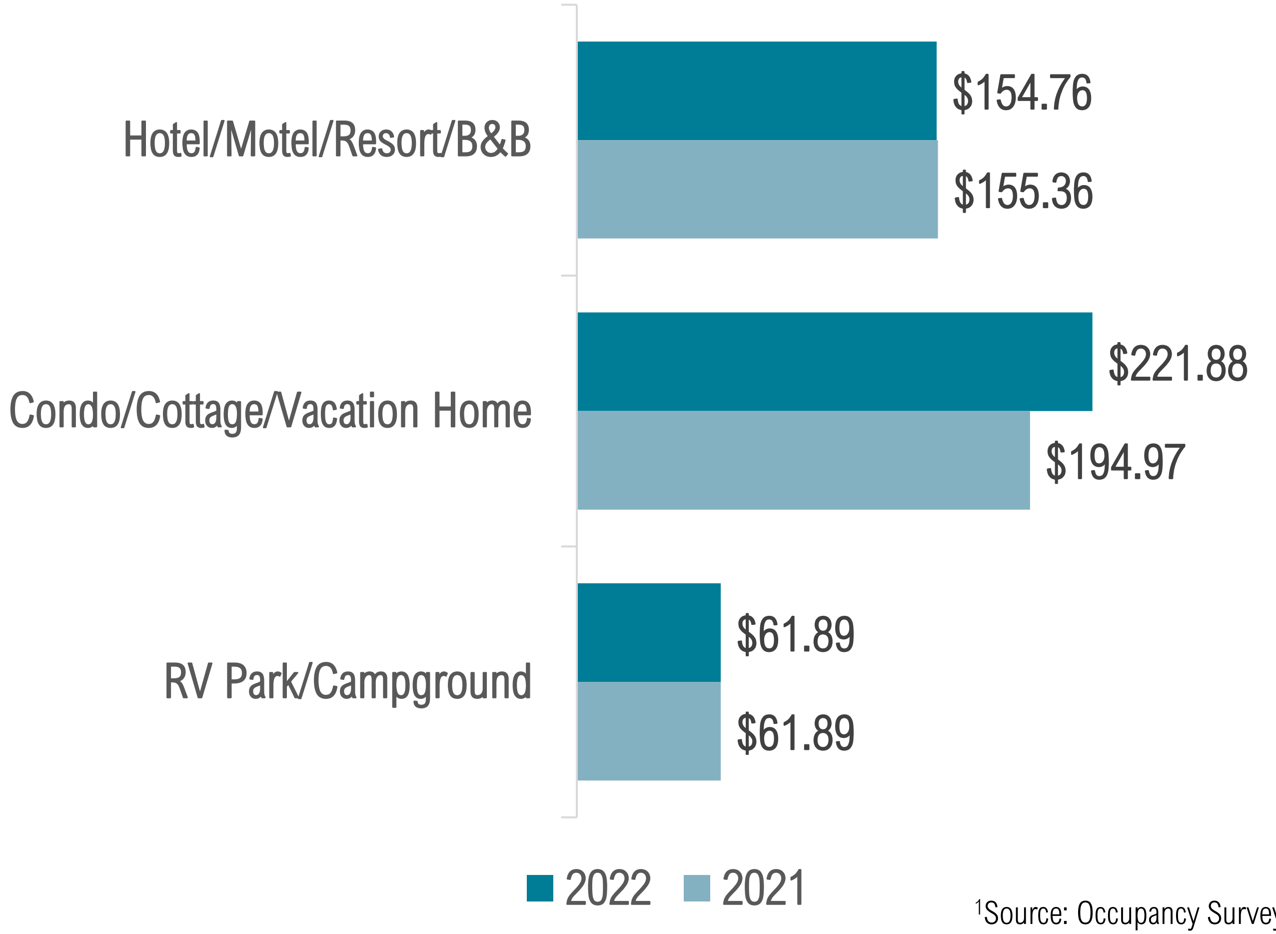
Average occupancy in July - September was 55.2%[1] (55.8% in 2021).




[1]Source: Occupancy Survey

# ADR

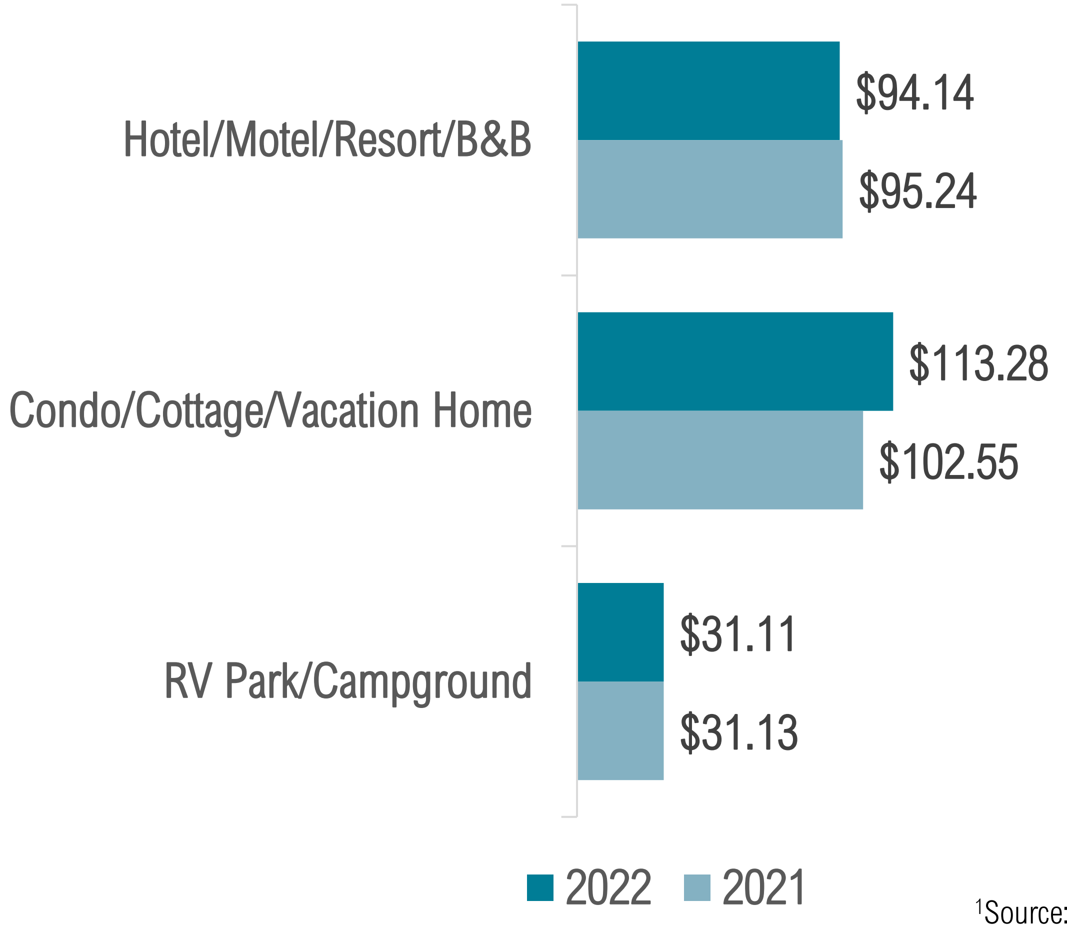
ADR in July - September was $151.82[1] ($139.36 in 2021).




[1]Source: Occupancy Survey

# REVPAR

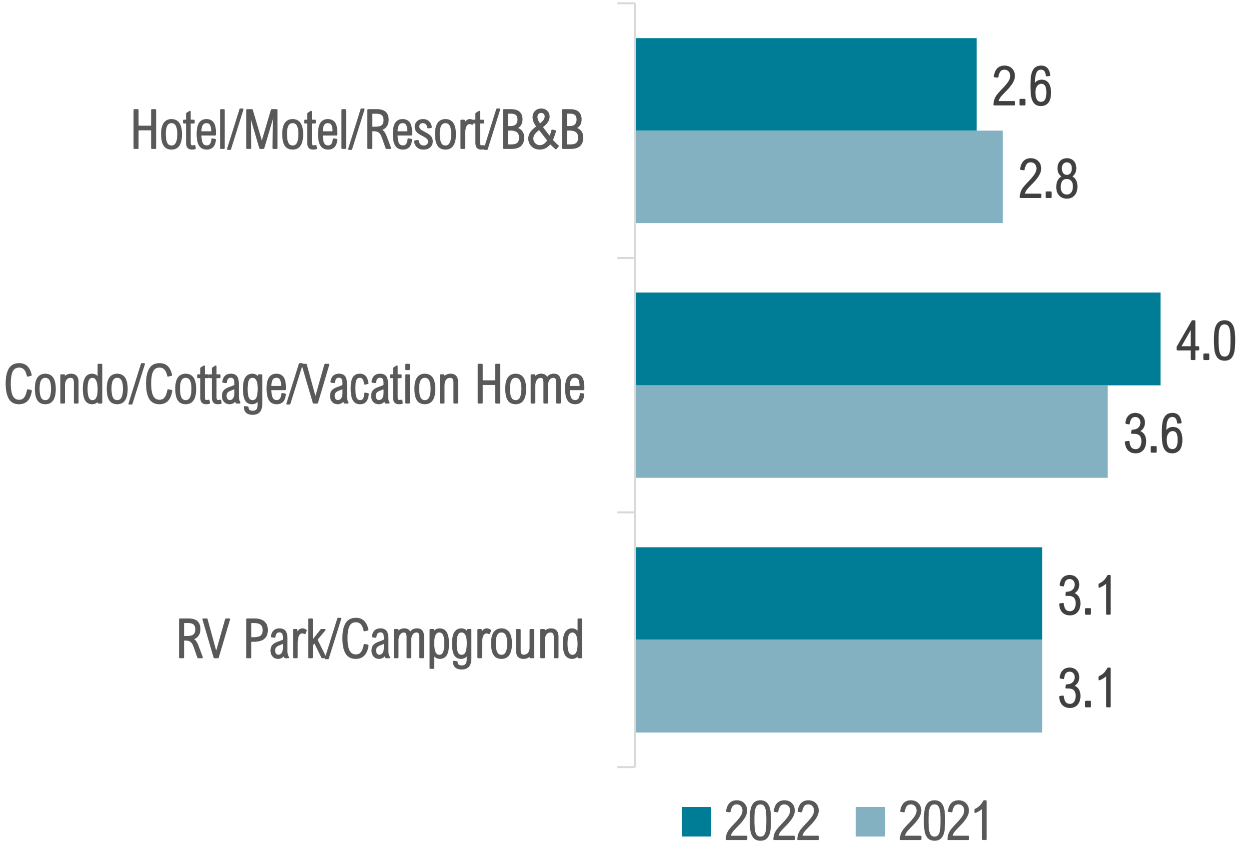
Average RevPAR in July - September was **$83.80** ($77.82 in 2021).




[1]Source: Occupancy Survey

# TRAVEL PARTY SIZE

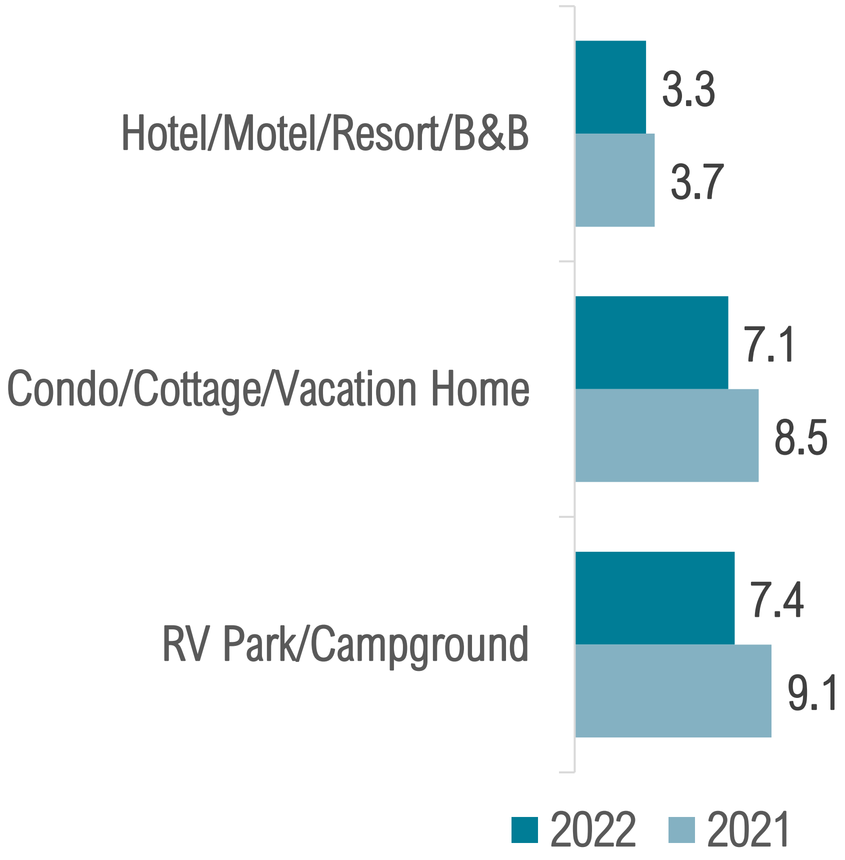
For visitors in paid accommodations, average travel party size in July - September was **3.0 people**[1] (3.0 people in 2021).




[1]Source: Occupancy Survey

# LENGTH OF STAY

For visitors in paid accommodations, average length of stay in July - September was **4.8 nights**[1] (5.0 nights in 2021).




[1]Source: Occupancy Survey

# Visitor Journey: Pre-Visit

Pre-Visit

Travel Party Profile

Trip Experience

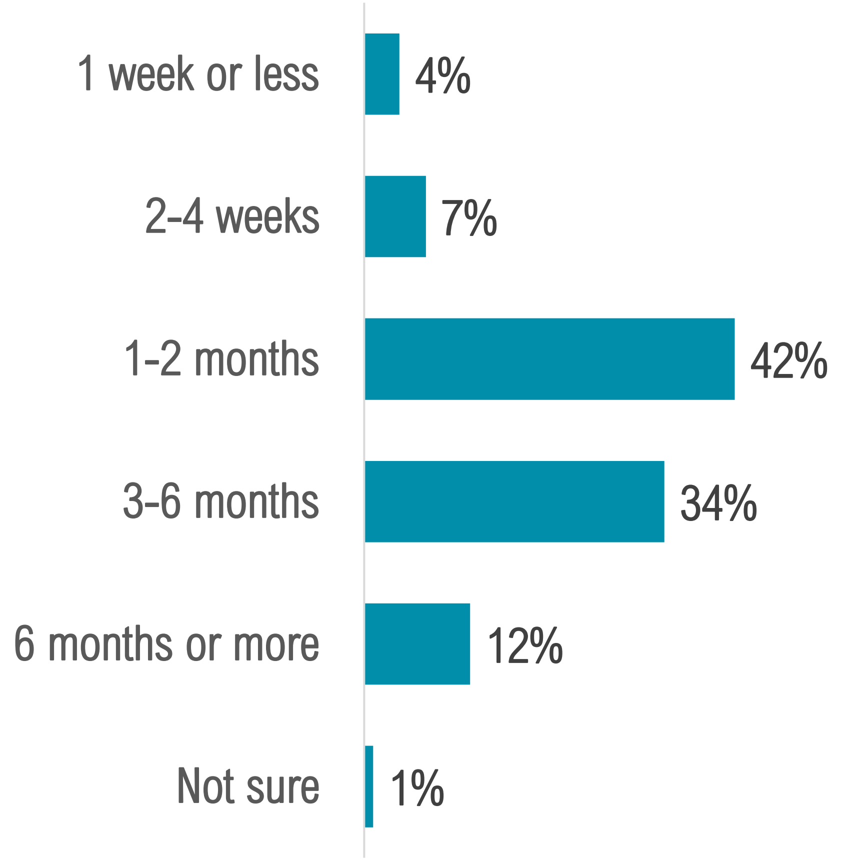
Post-Trip Evaluation

Economic Impact on Destination

# TRIP PLANNING CYCLE

2 in 5 of visitors planned their trip 1-2 months in advance, while about 1 in 8 planned their trip more than 6 months in advance.

The average trip planning cycle lasted nearly 3 months (88 days).

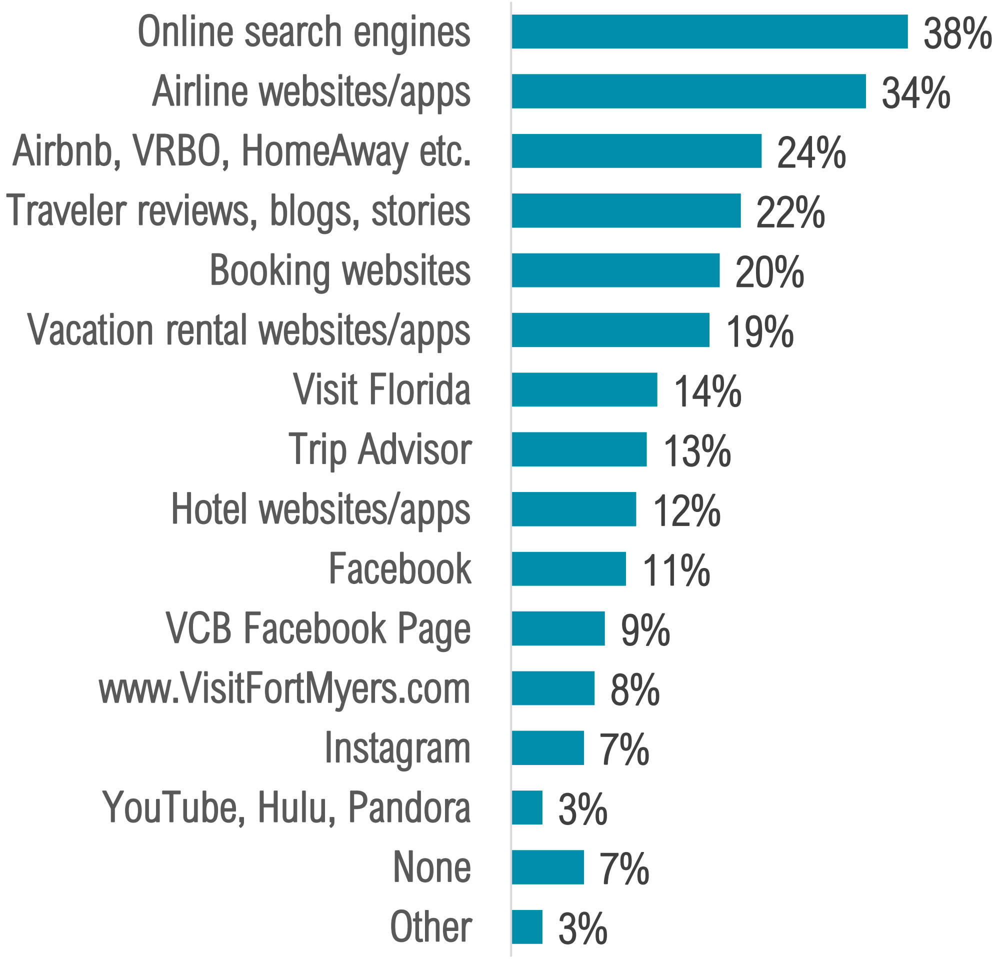


# TRIP PLANNING: WEBSITES/APPS USED[1]

Over **9 in 10** visitors used **websites and apps** to plan their trip to the Fort Myers area.

Visitors were most likely to use **online search engines or airline websites/apps** to plan their trips.

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



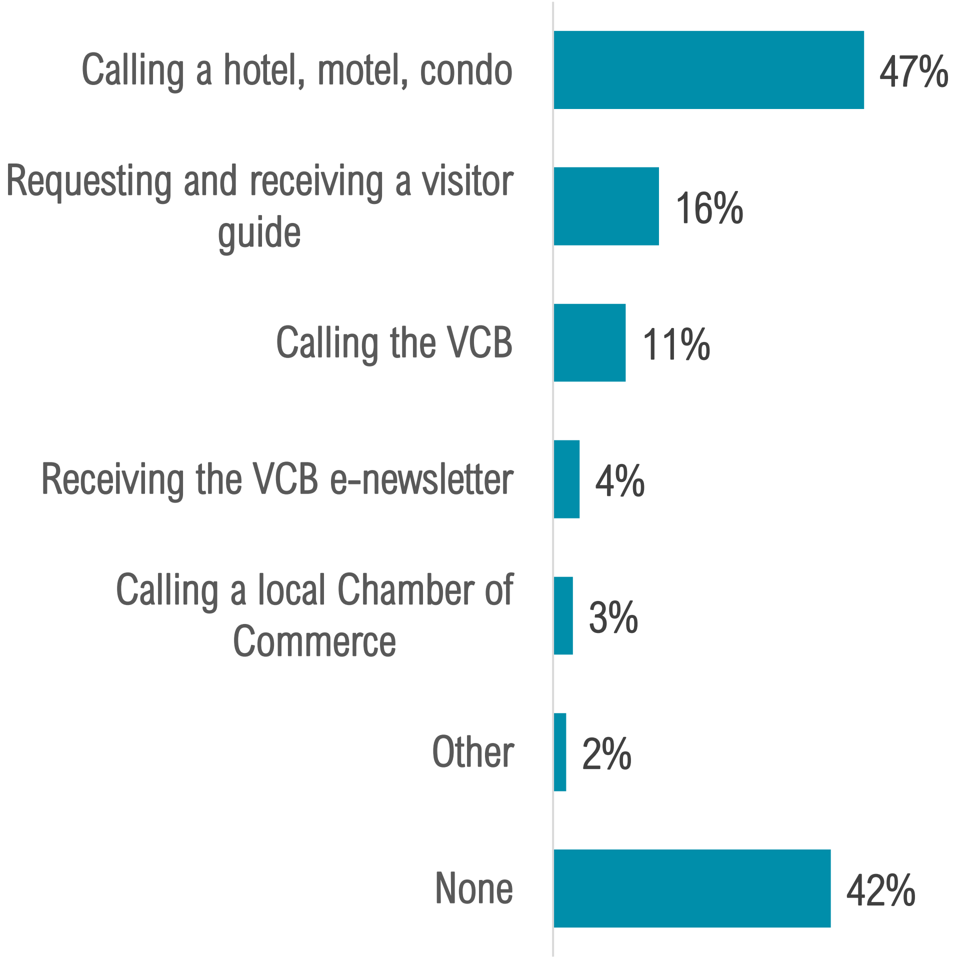

[1]Multiple responses permitted.

# TRIP PLANNING: INFORMATION REQUESTS[1]

Nearly **3 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 Q3 2022 increased from Q3 2021.



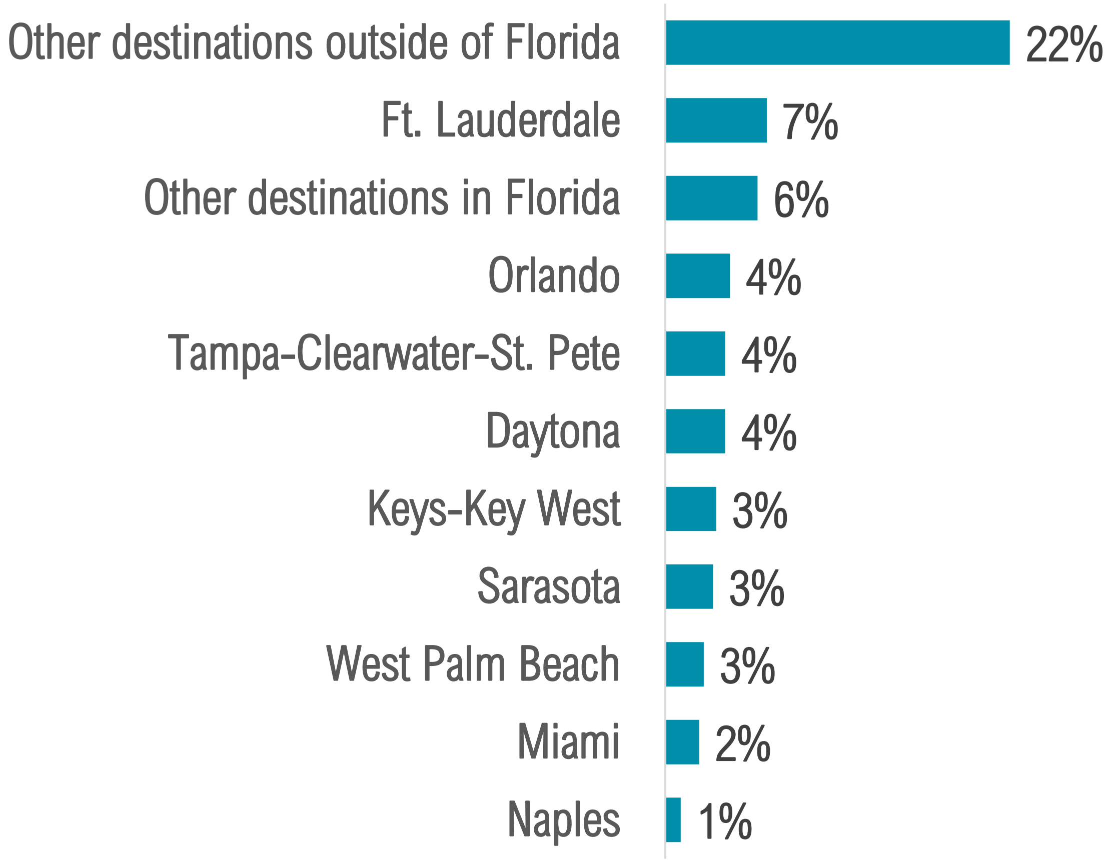

[1]Multiple responses permitted.

# TRIP PLANNING: OTHER DESTINATIONS CONSIDERED

54% of visitors considered choosing other destinations when planning their trips.

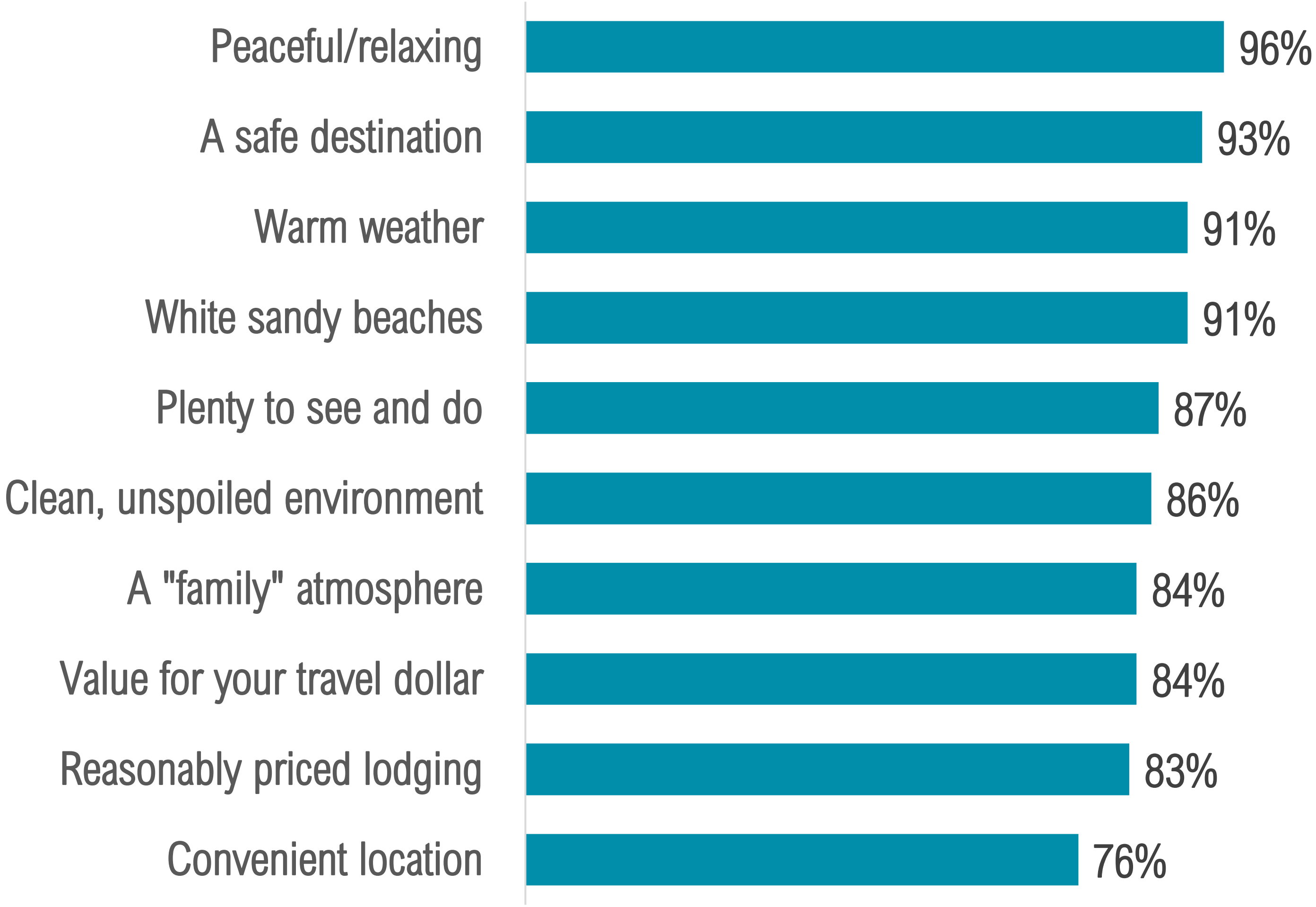
More than 1 in 5 visitors considered destinations outside of Florida.

BASE: 54% of visitors who considered other destinations



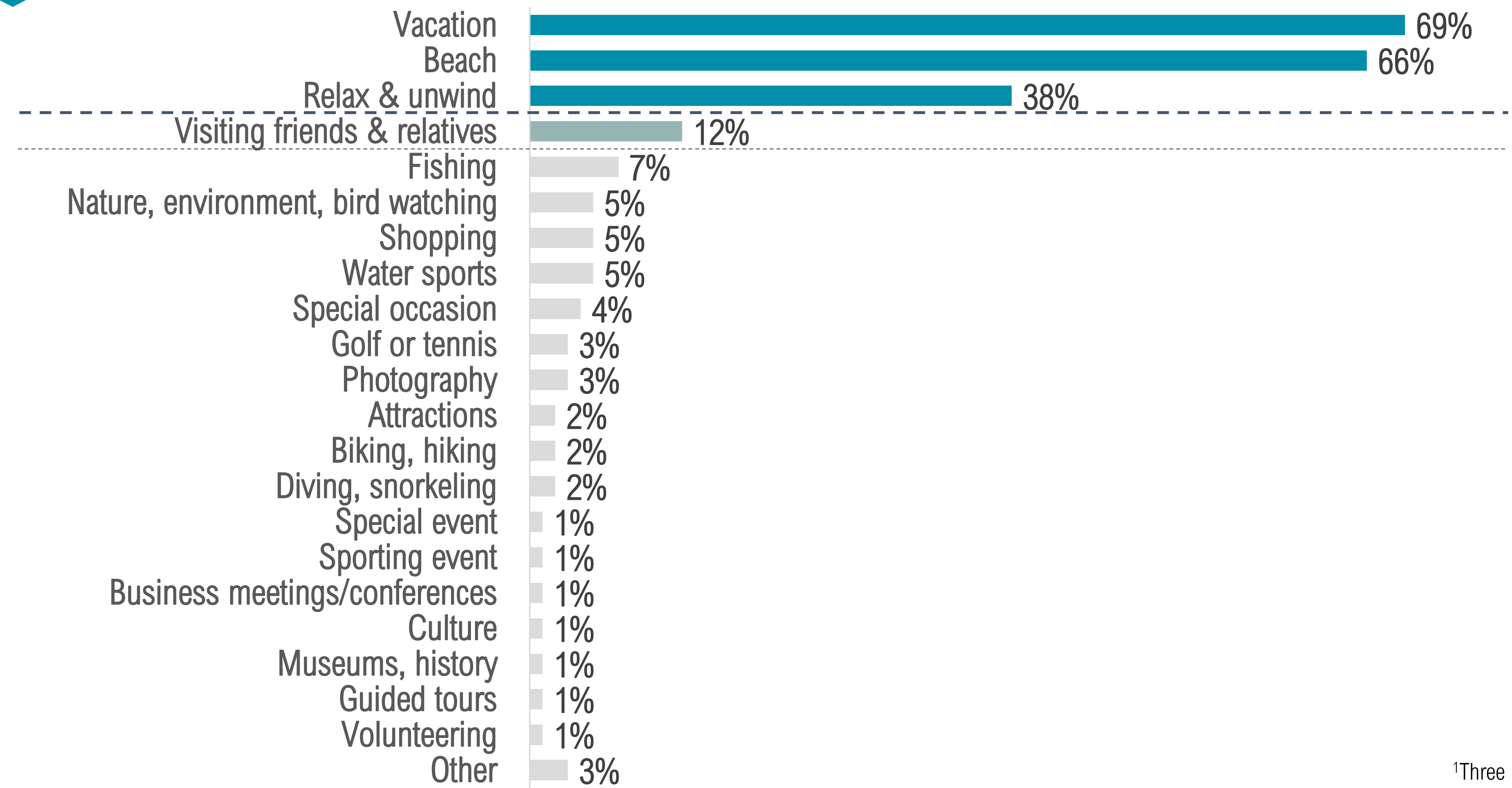
# TRIP INFLUENCERS[1]

Over **9 in 10** visitors were heavily influenced by the Fort Myers area being **peaceful** and **a safe destination** when thinking about visiting.




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

# REASON FOR VISITING[1]




[1]Three responses permitted.

# PROMOTIONS[1]

55% of visitors **recalled promotions** in the past 6 months for the Fort Myers area.

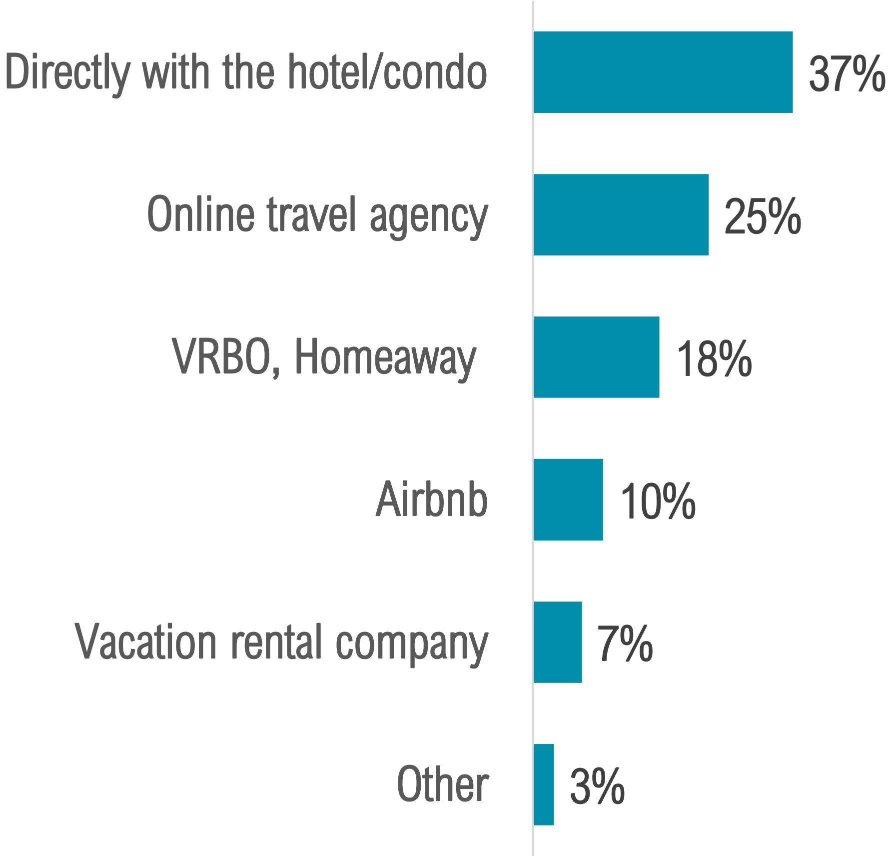
This influenced 29% of all visitors to come to the Fort Myers area.

BASE: 55% of visitors who recalled promotions


[1]Multiple responses permitted.

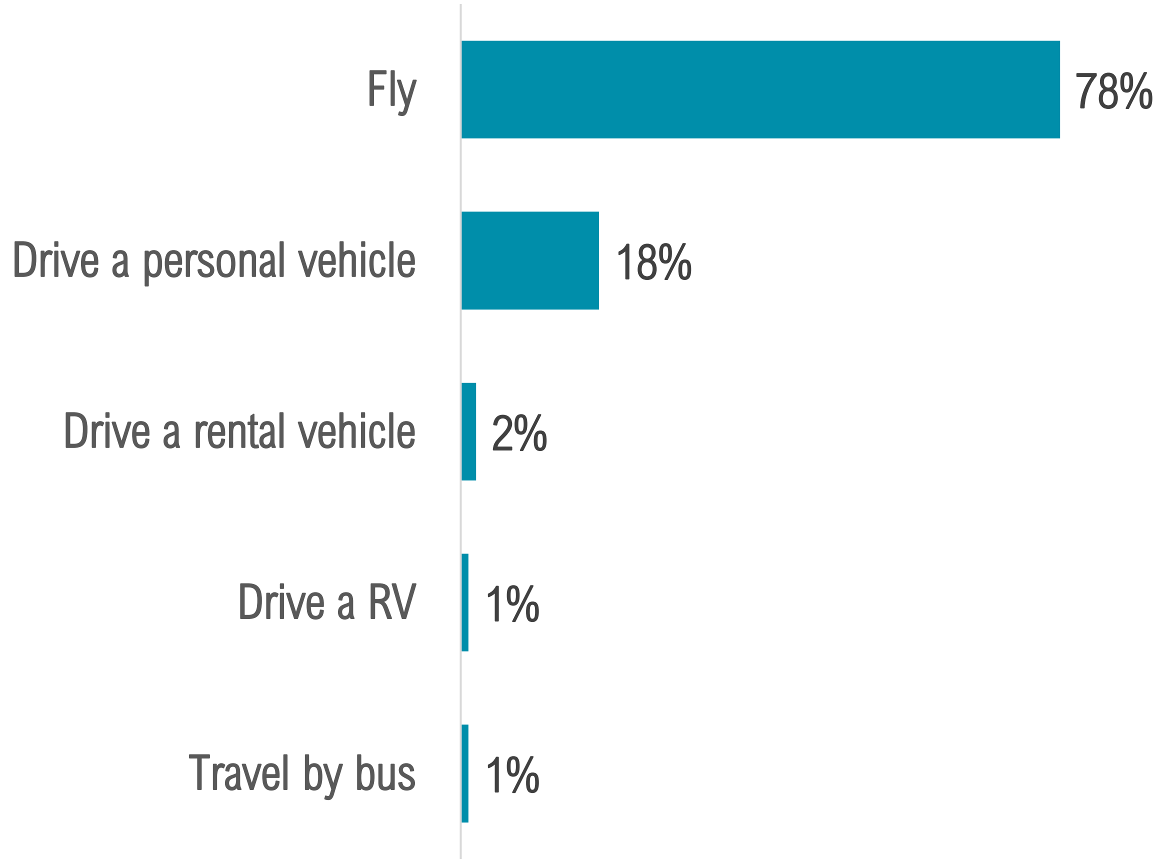
# BOOKING

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



# TRANSPORTATION

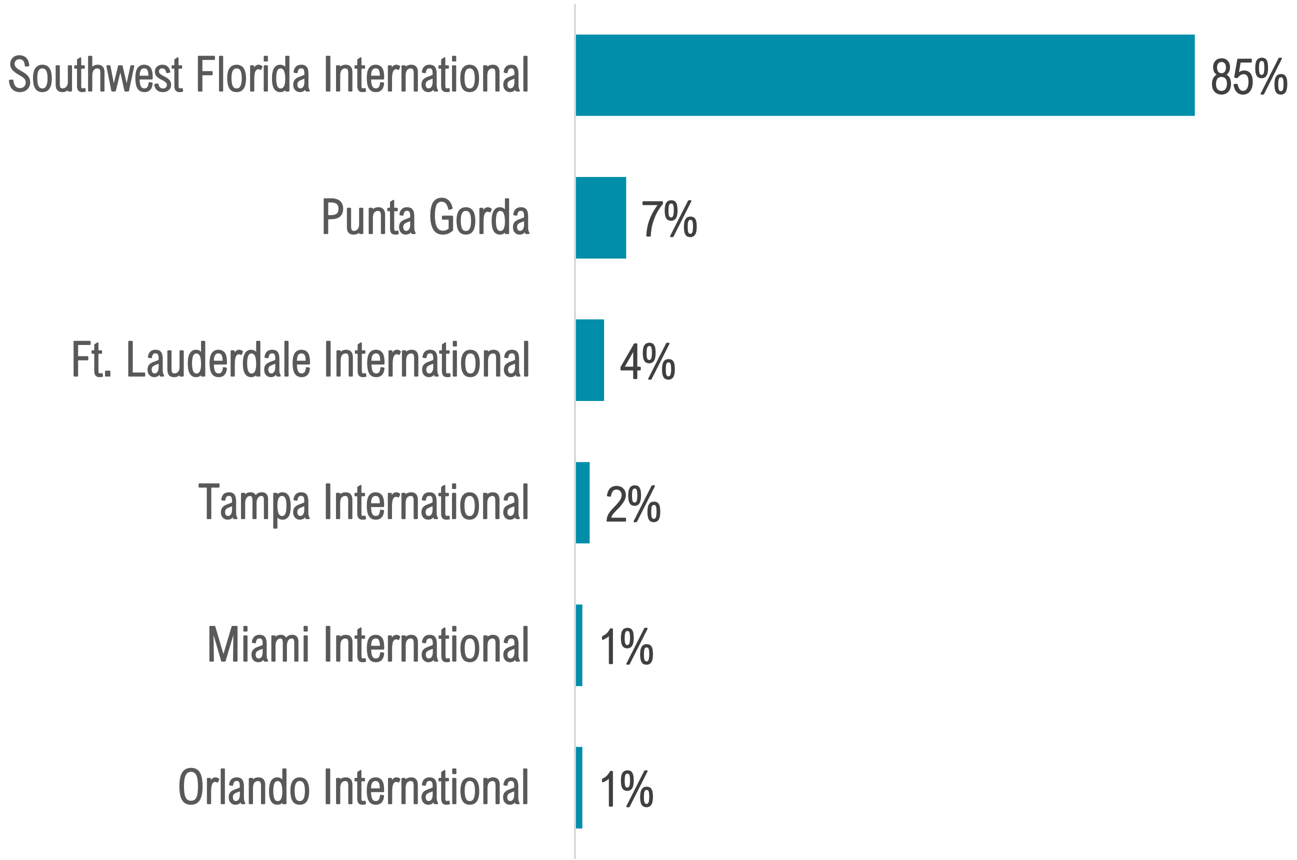
Nearly 4 in 5 visitors flew to the Fort Myers area.



# AIRPORT

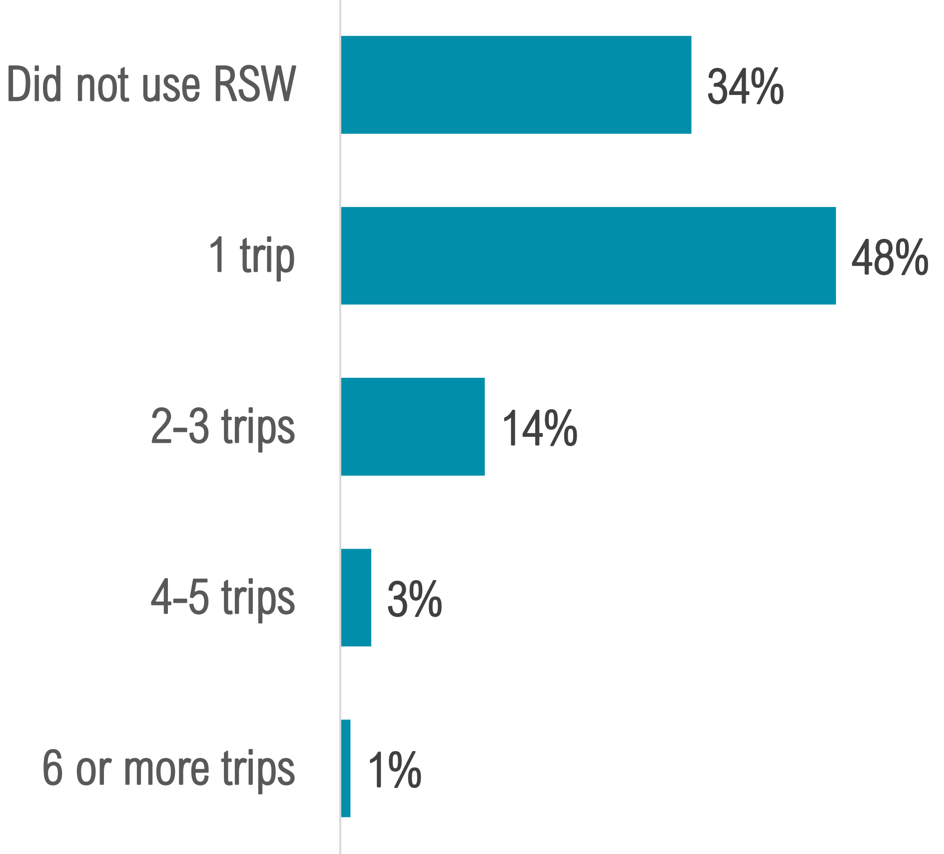
Over 4 in 5 visitors who flew to the Fort Myers area came through RSW.

BASE: 78% of visitors who flew



# USE OF RSW IN THE PAST YEAR

66% of visitors used RSW at least once in the past year.



# VISITOR JOURNEY: TRAVEL PARTY PROFILE

Pre-Visit

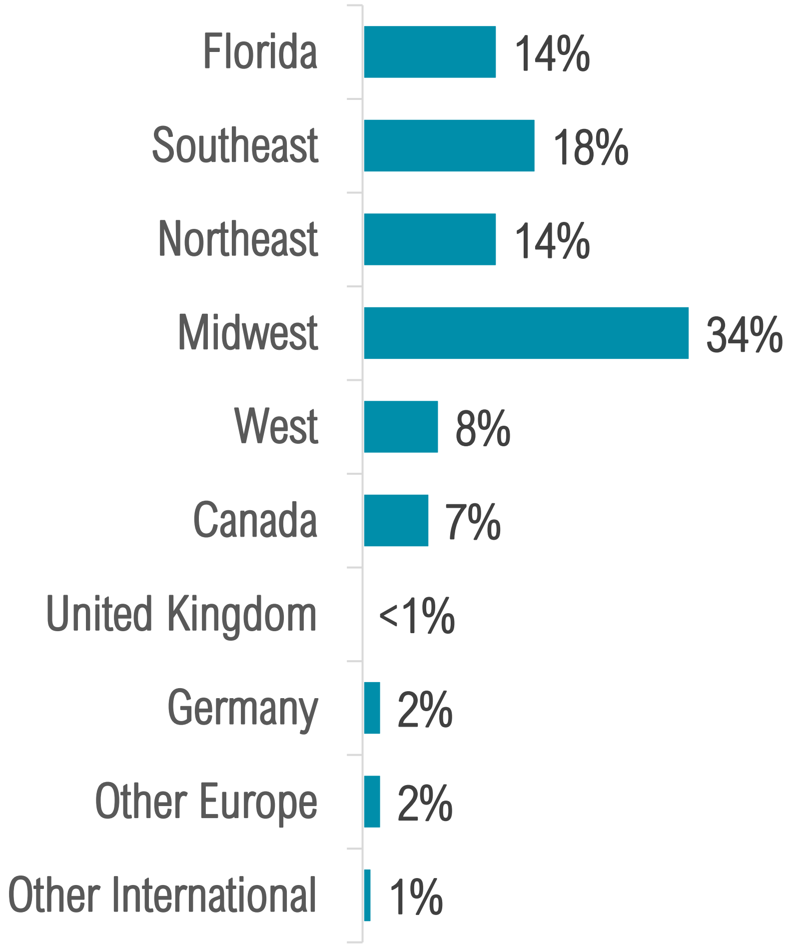
**Travel Party Profile**

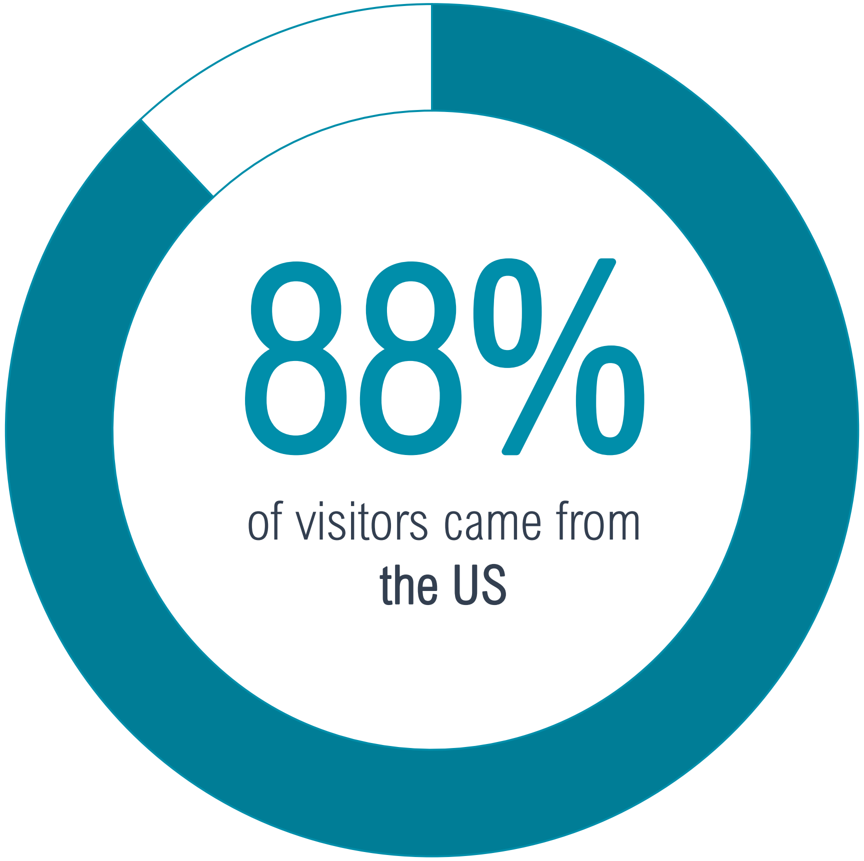
Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

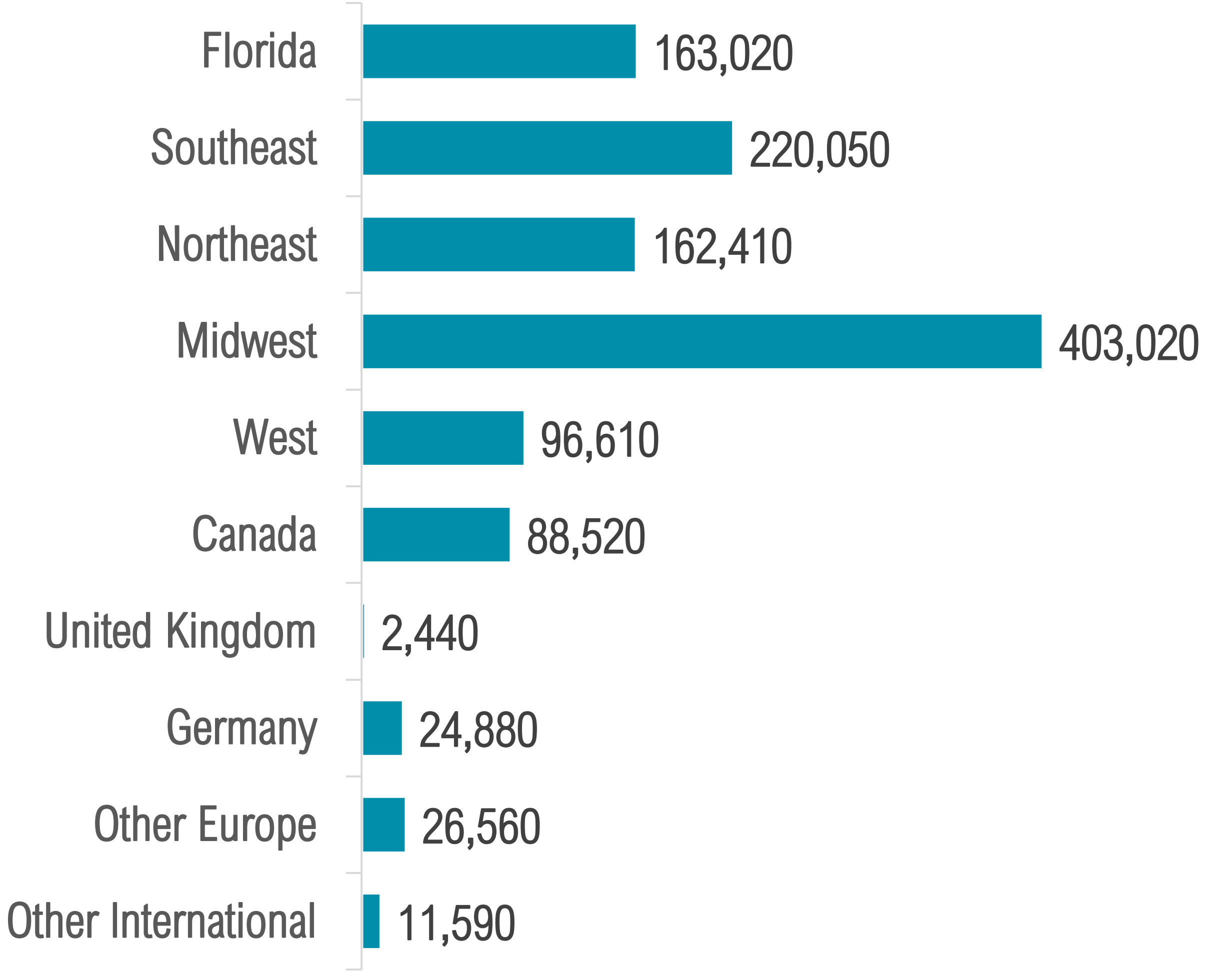
# ORIGIN[1]



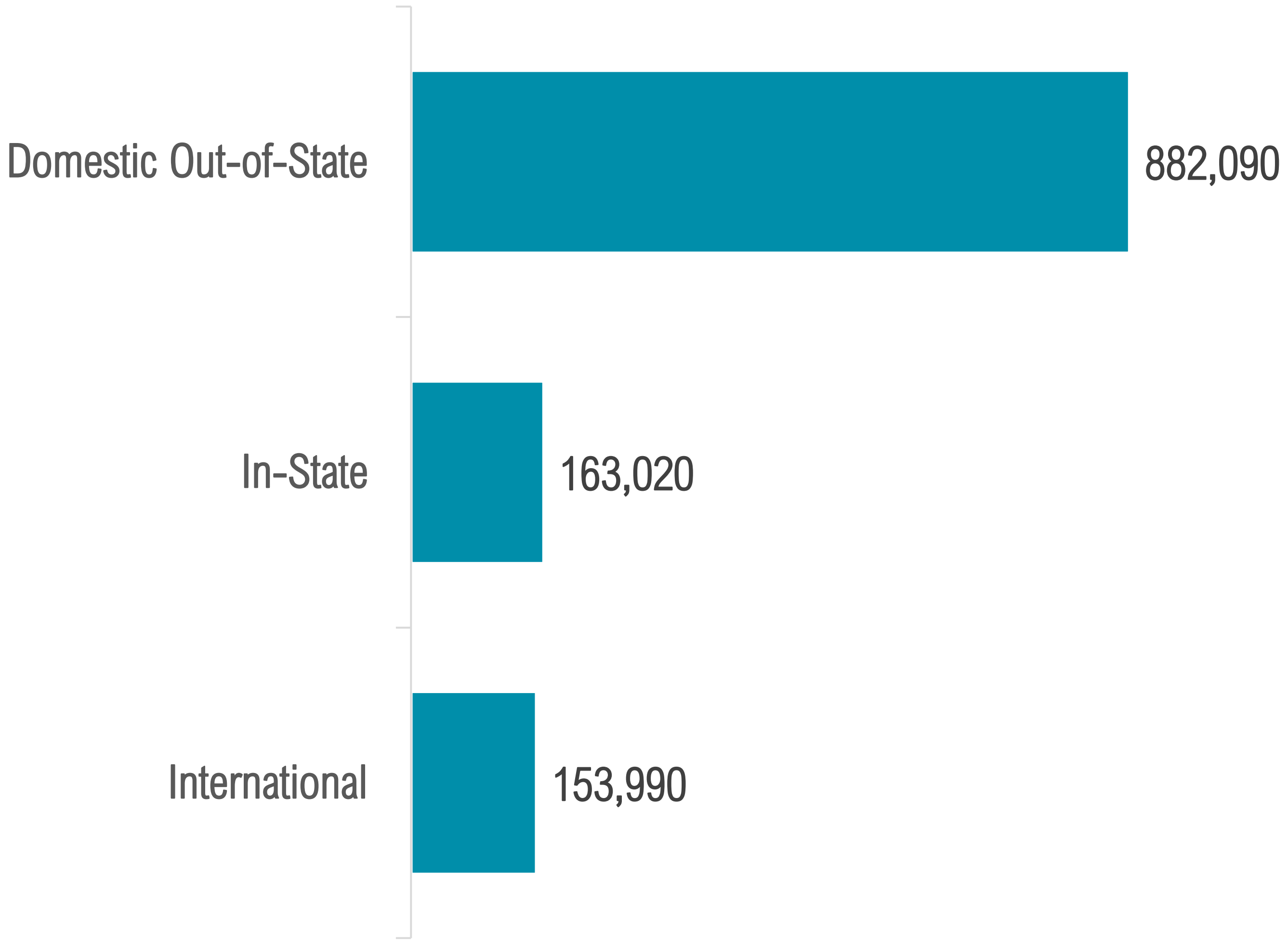

[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers. Based on the Visitor Tracking Study and supplemental data from Arrivalist.

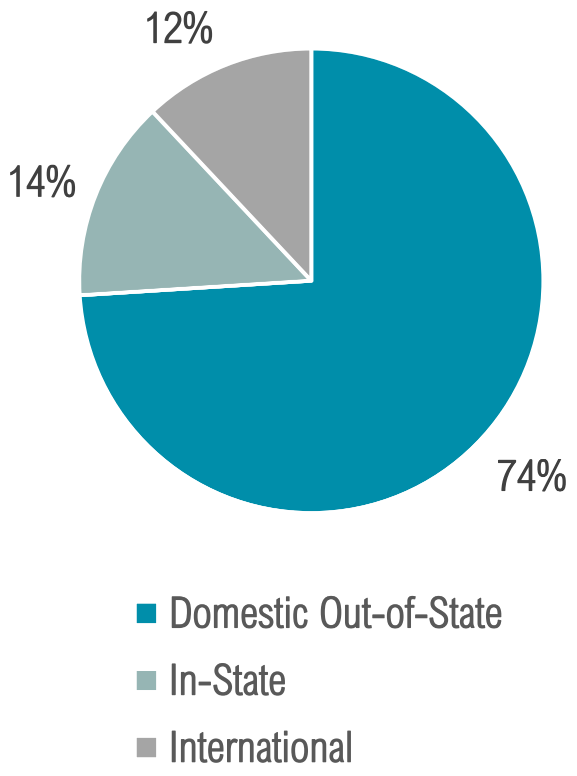
# NUMBER OF VISITORS BY ORIGIN[1]




[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

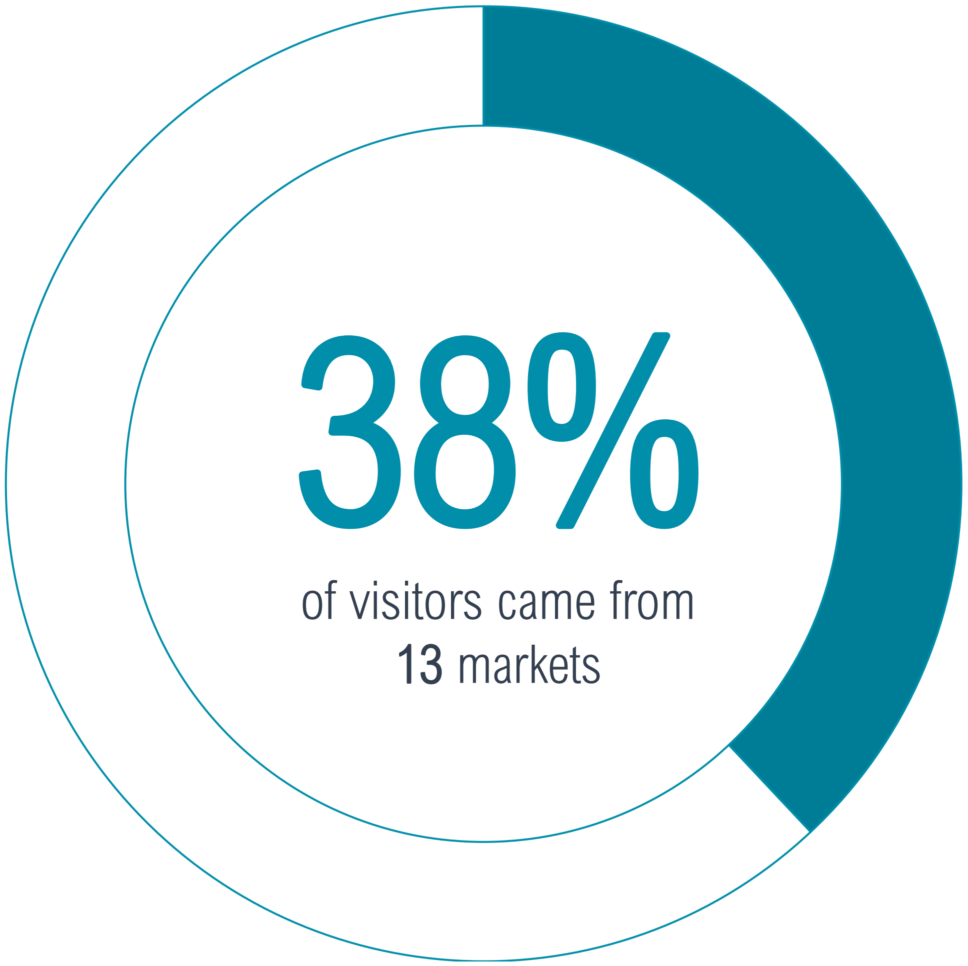



[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers. Based on the Visitor Tracking Study and supplemental data from Arrivalist.

# ORIGIN MARKETS[1]

| Market [2] | Percentage of Visitors |
|---|---|
| Miami – Fort Lauderdale | 6% |
| Chicago | 4% |
| Cleveland – Akron | 4% |
| Tampa – St. Petersburg | 3% |
| Atlanta | 3% |
| Cincinnati | 3% |
| Louisville | 3% |
| New York | 2% |
| Orlando – Daytona Beach – Melbourne | 2% |
| Houston | 2% |
| Washington, DC – Hagerstown | 2% |
| Jacksonville | 2% |
| Denver | 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.

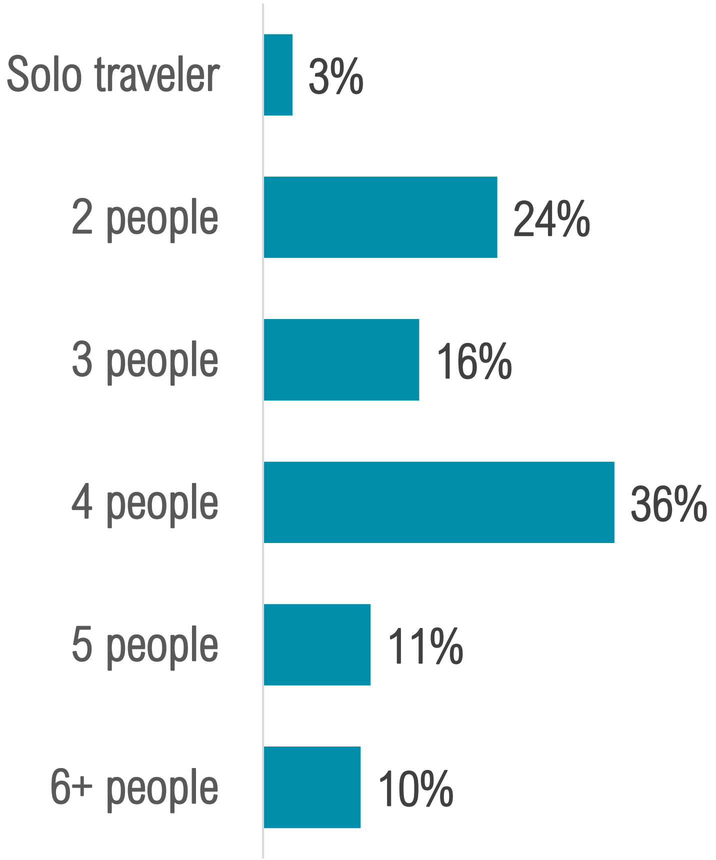
# TRAVEL PARTY SIZE AND COMPOSITION

*Travel Party Size*

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

*Travel with Children*

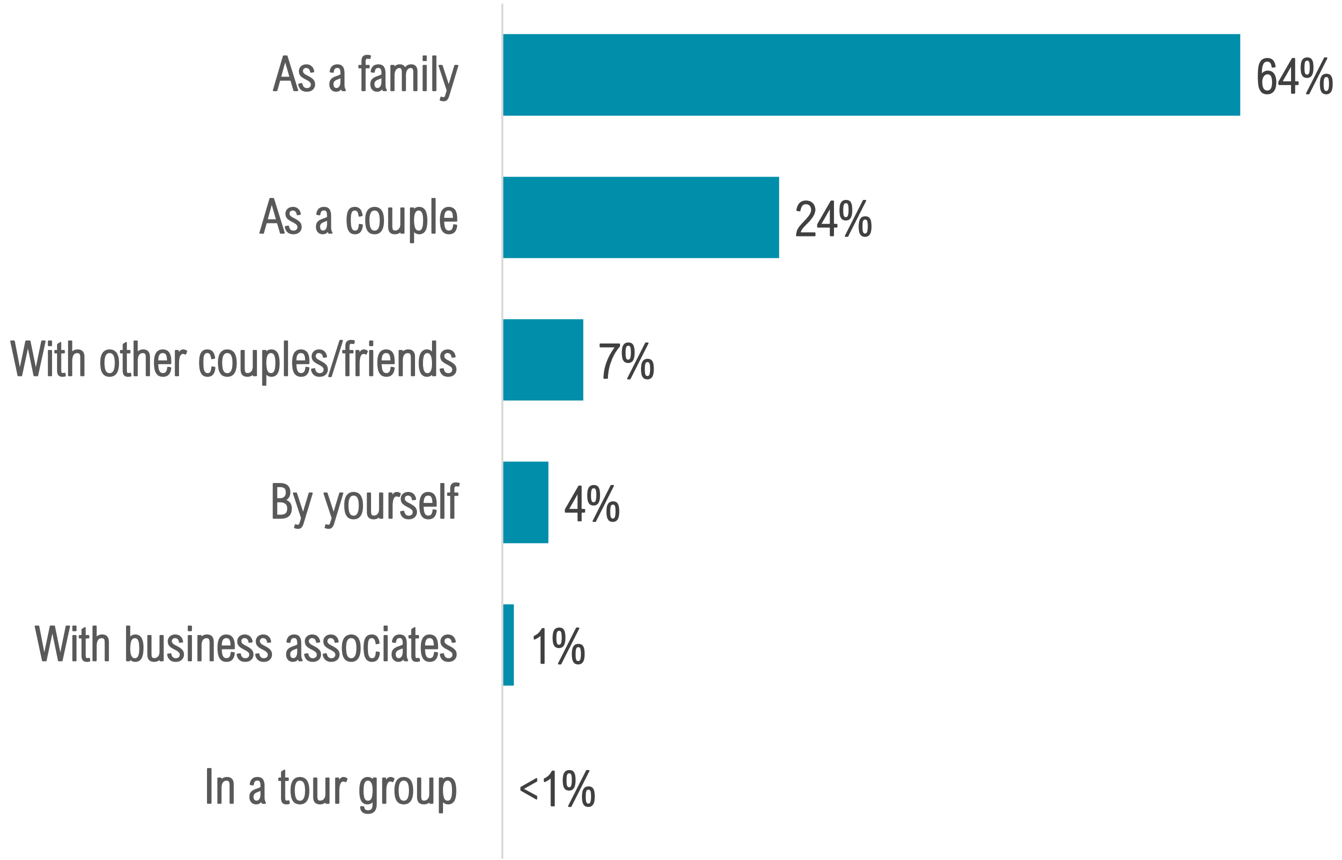
**56%** of visitors **traveled with children** under the age of 18.




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

# TRAVEL PARTY TYPE

64% of visitors traveled as a family, while 1 in 4 visitors traveled as a couple.



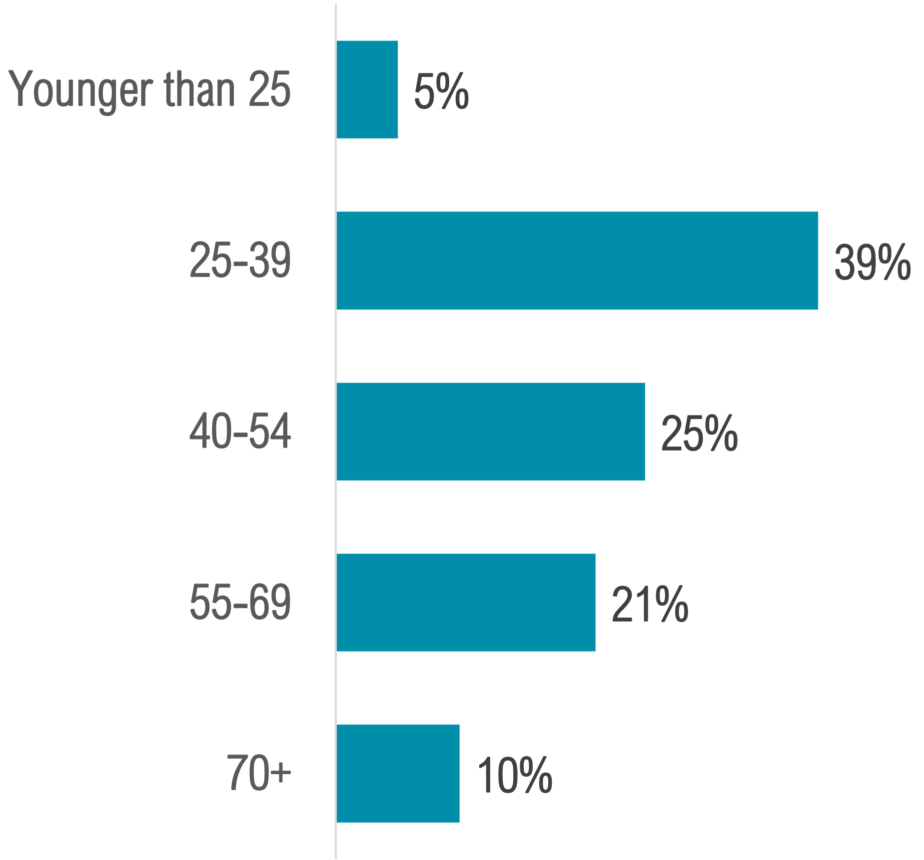
# AGE

***Average Age***

The average age of July - September visitors was **52 years old.**

***Median Age***

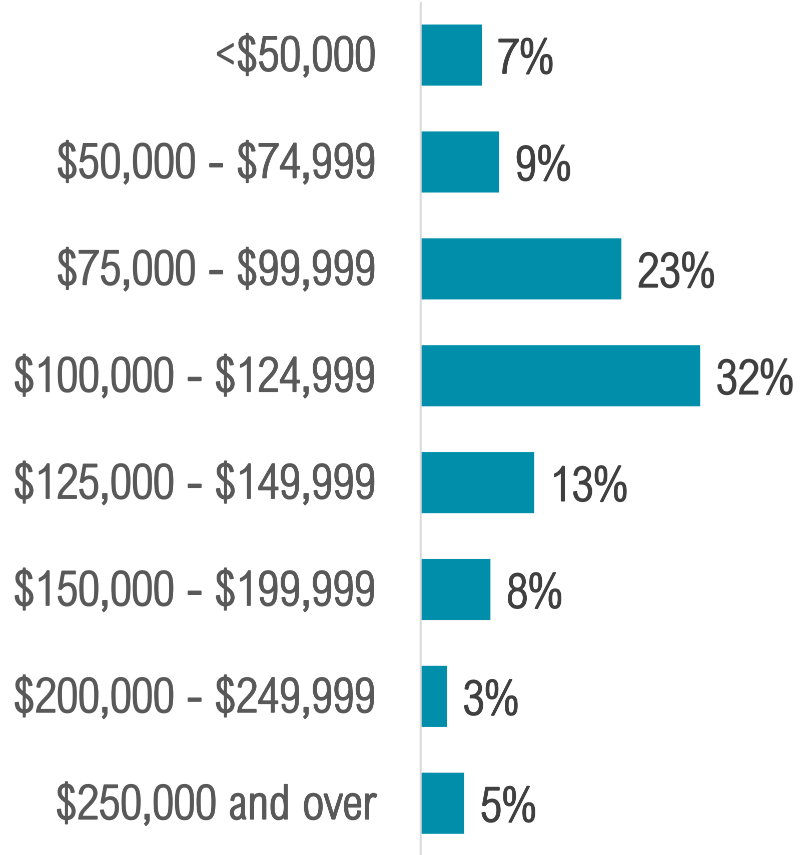
The average age of July - September visitors was **43 years old.**



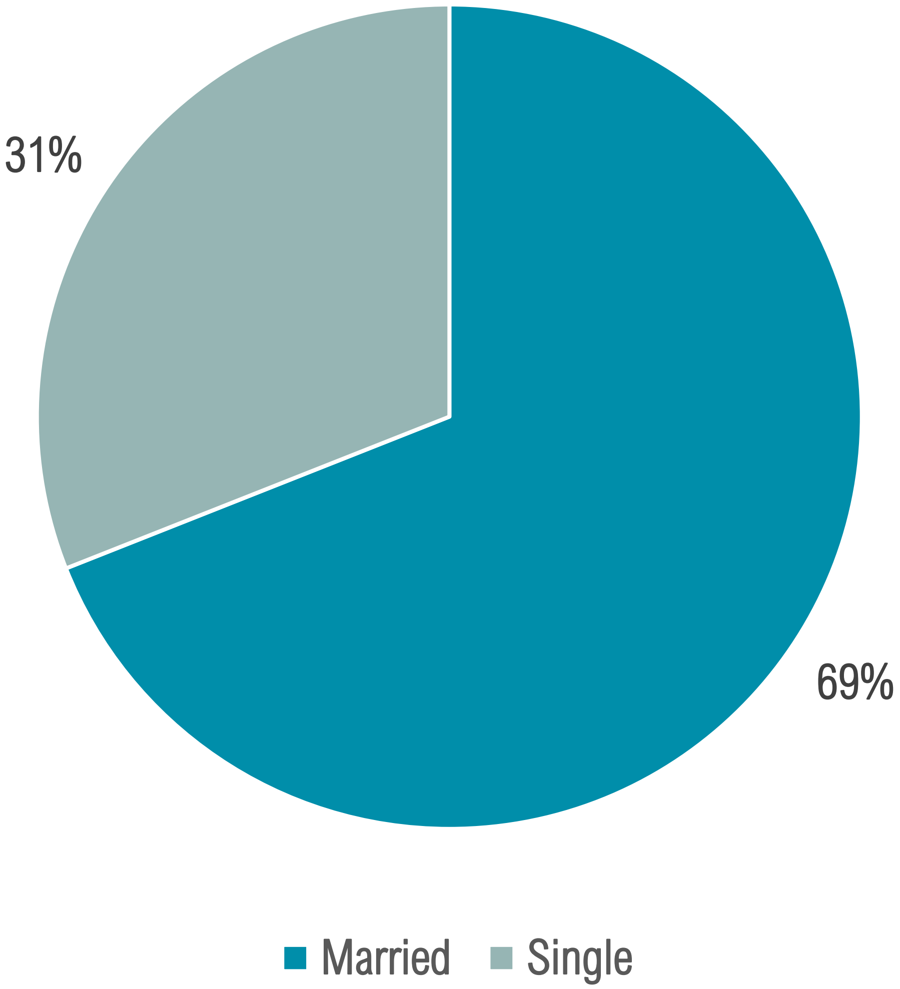
# HOUSEHOLD INCOME

*Median Household Income*
July - September visitors had a median household income of **$108,600.**

8% of visitors had a household income in excess of **$200,000.**



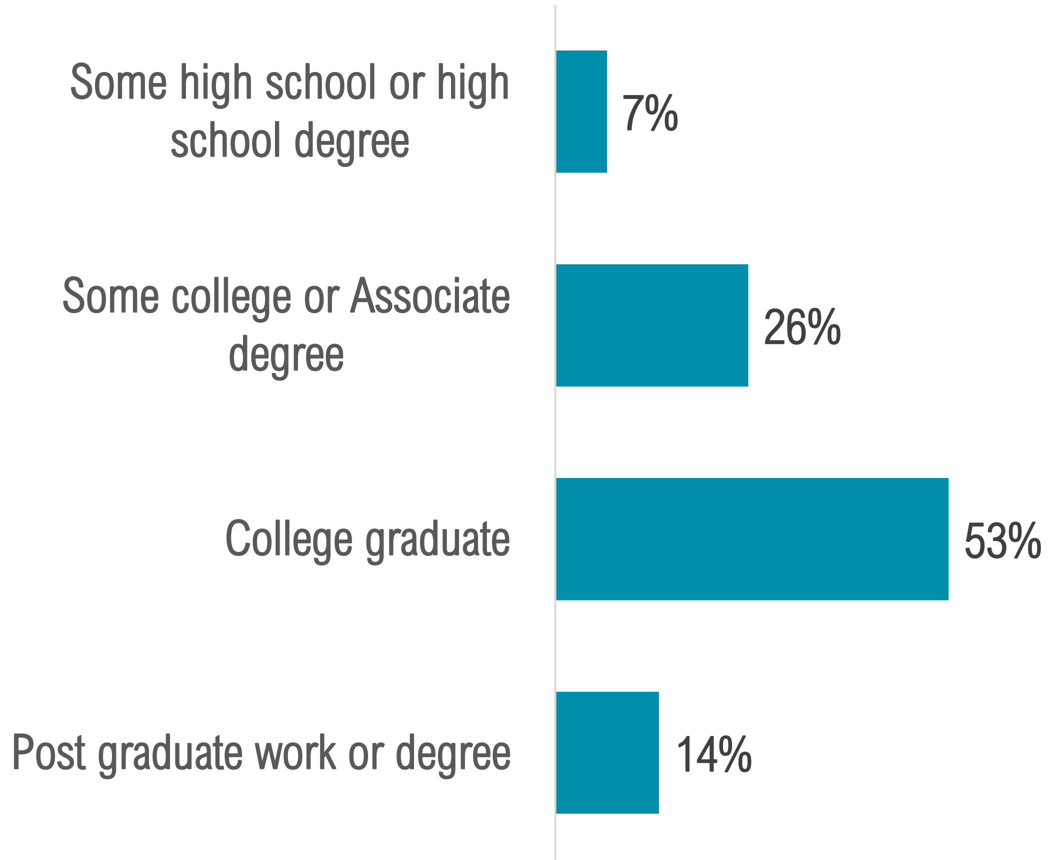
# MARITAL STATUS



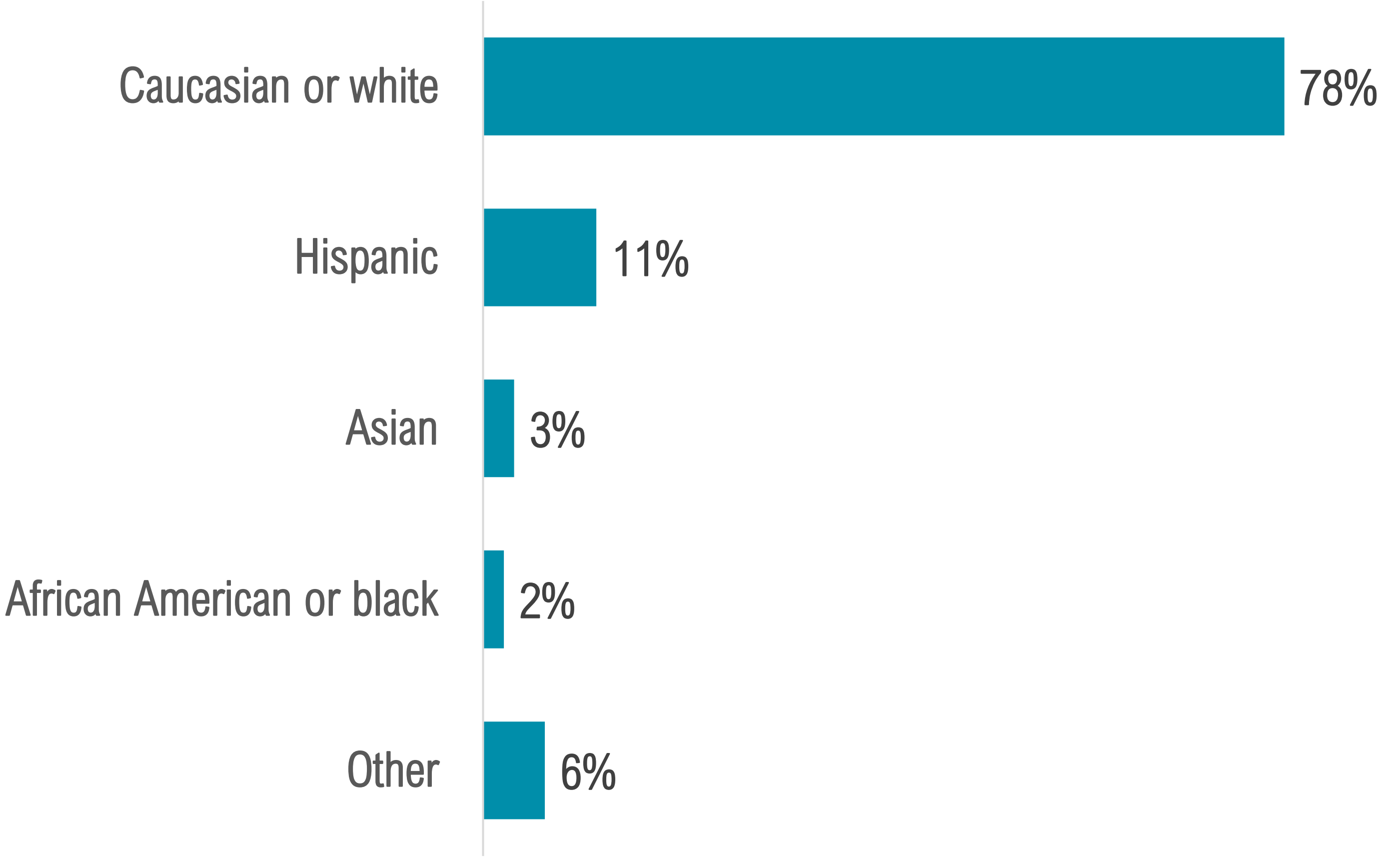
# EDUCATION

*Education Level*

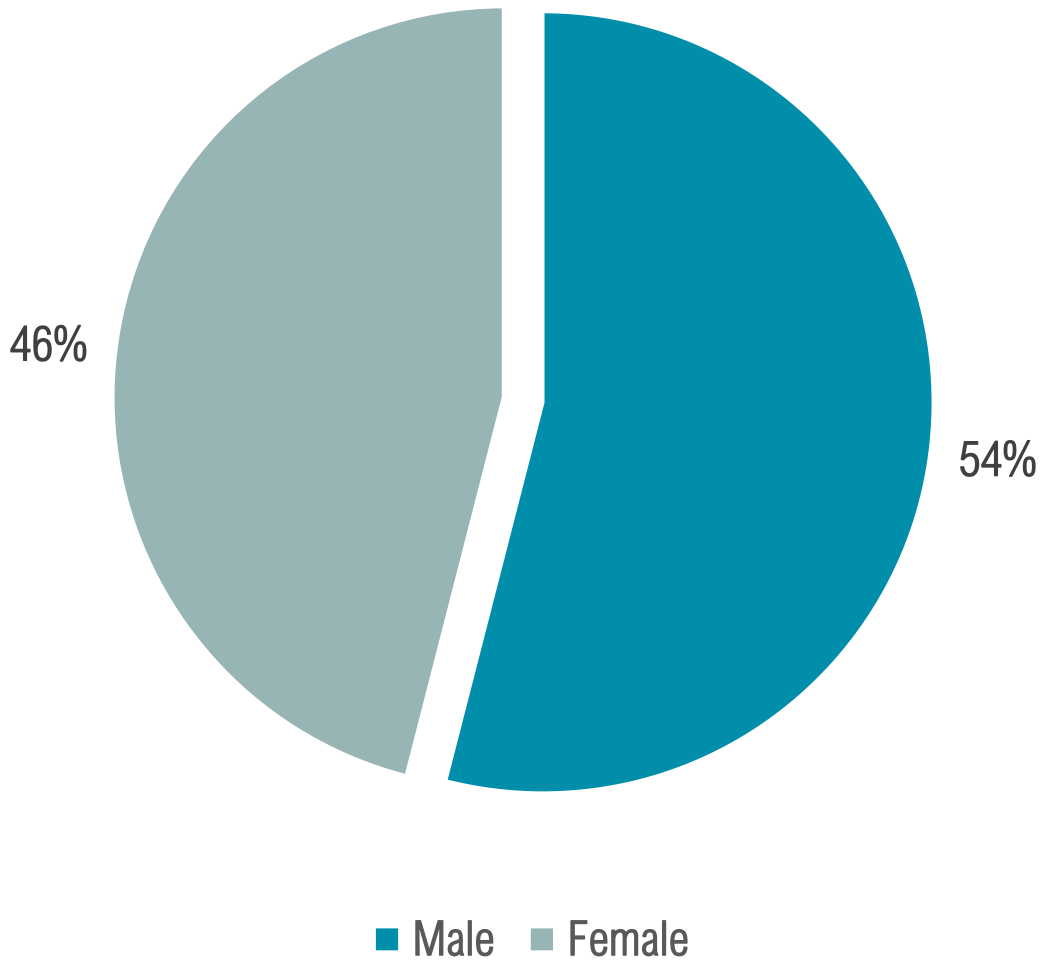
2 in 3 of July - September visitors have a **college degree or higher.**



# RACE/ETHNICITY



# GENDER[1]

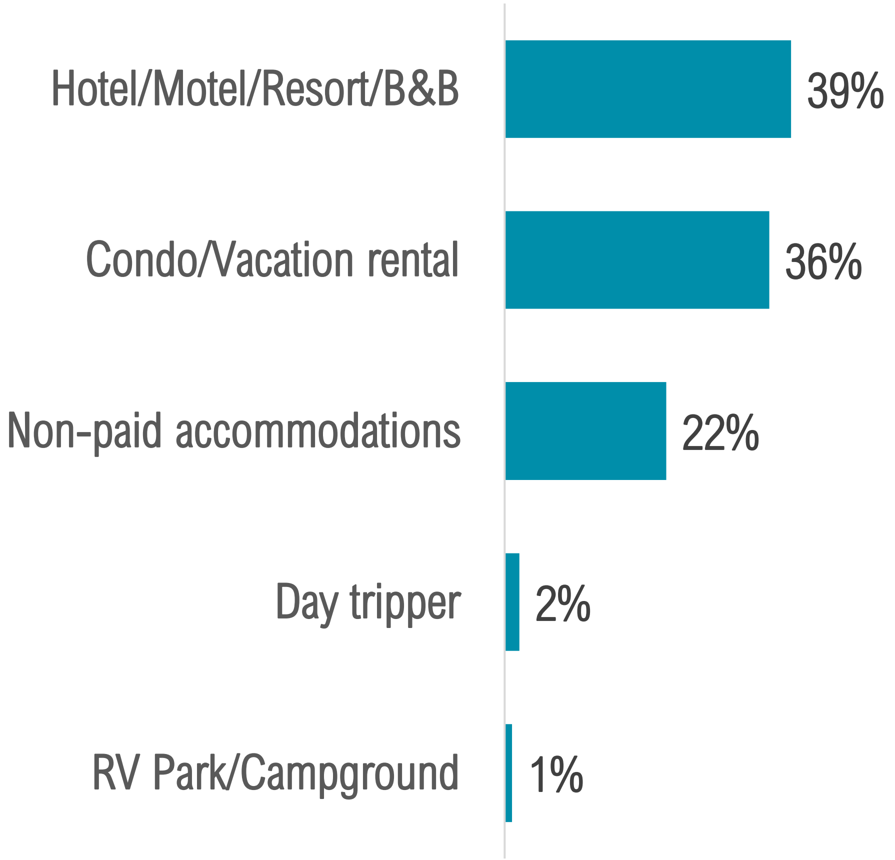



[1]Gender of person interviewed.

# VISITOR JOURNEY: TRIP EXPERIENCE

# ACCOMMODATIONS

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



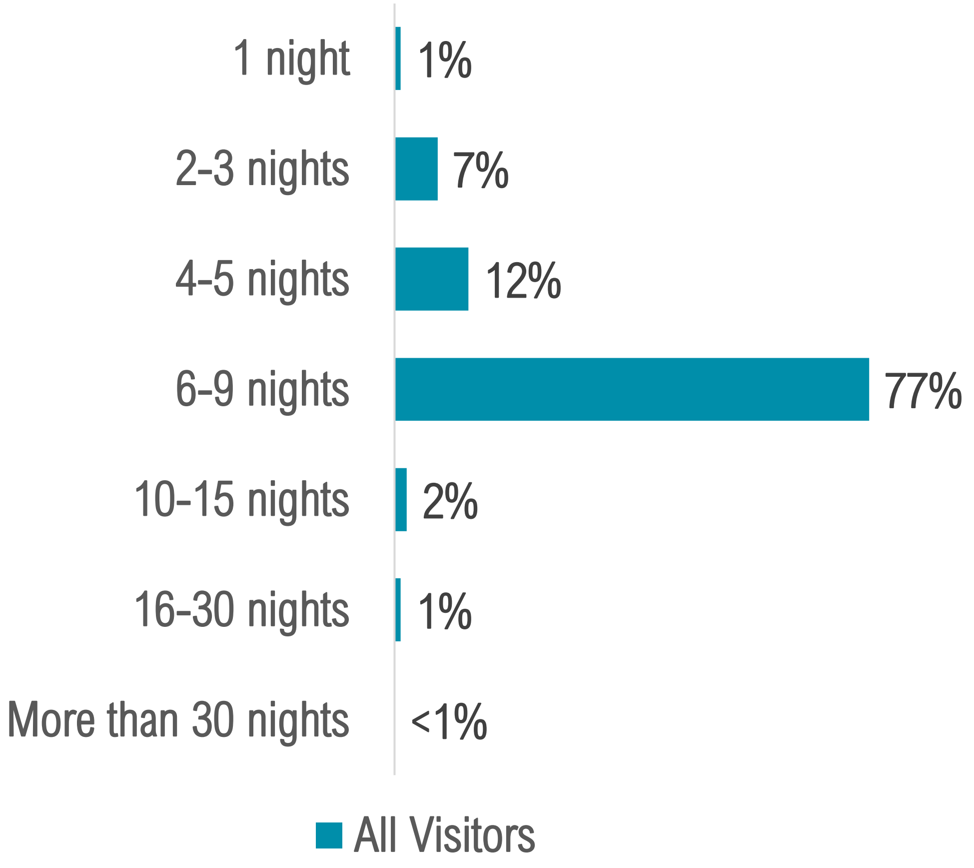
# NIGHTS STAYED

### *All Visitors*

Visitors spent an average of **5.2[1] nights** in the Fort Myers area.

### *Visitors Staying in Paid Accommodations*

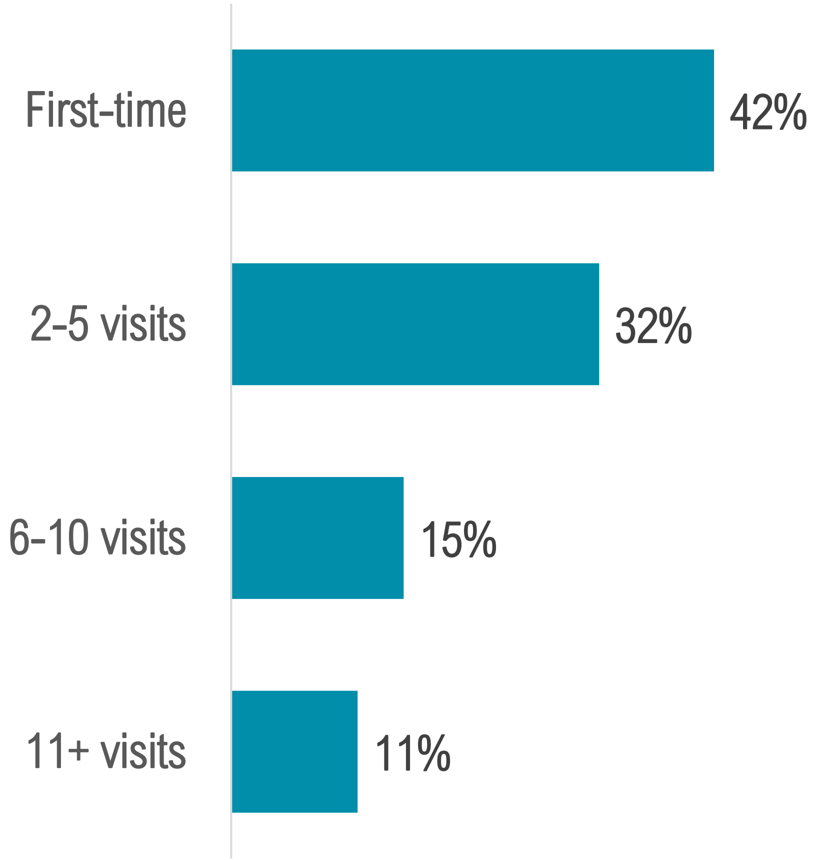
Visitors staying in paid accommodations spent an average of **4.8[2] nights** in the Fort Myers area.



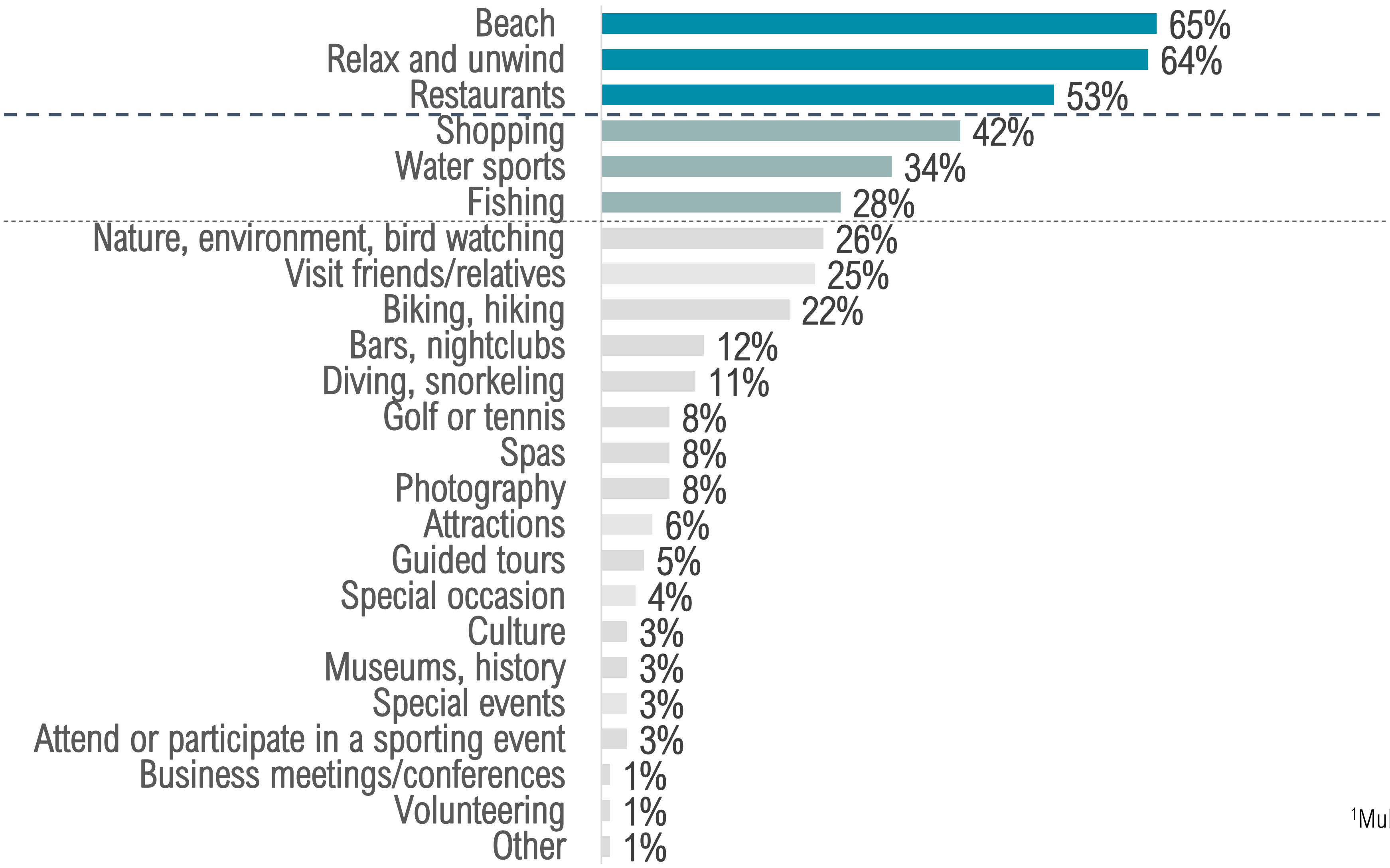

[1]Sources: Occupancy Study for visitors staying in paid accommodations and Visitor Tracking Survey for all other visitors
[2]Source: Occupancy Study

# FIRST TIME AND EXPERIENCED VISITORS

Over 2 in 5 visitors were visiting for the first time, while about 1 in 10 were highly loyal visitors, having visited more than 10 times.

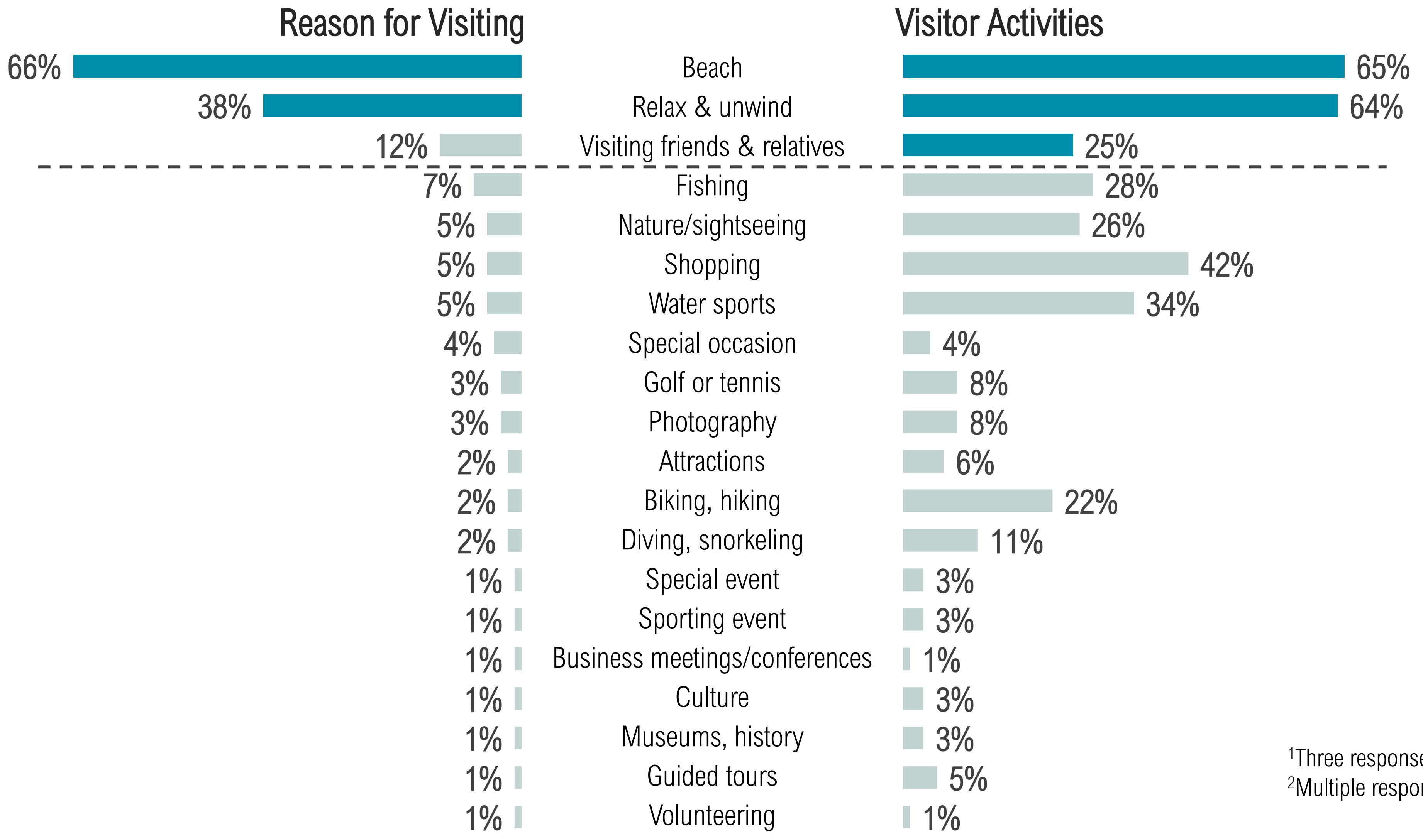


# VISITOR ACTIVITIES[1]



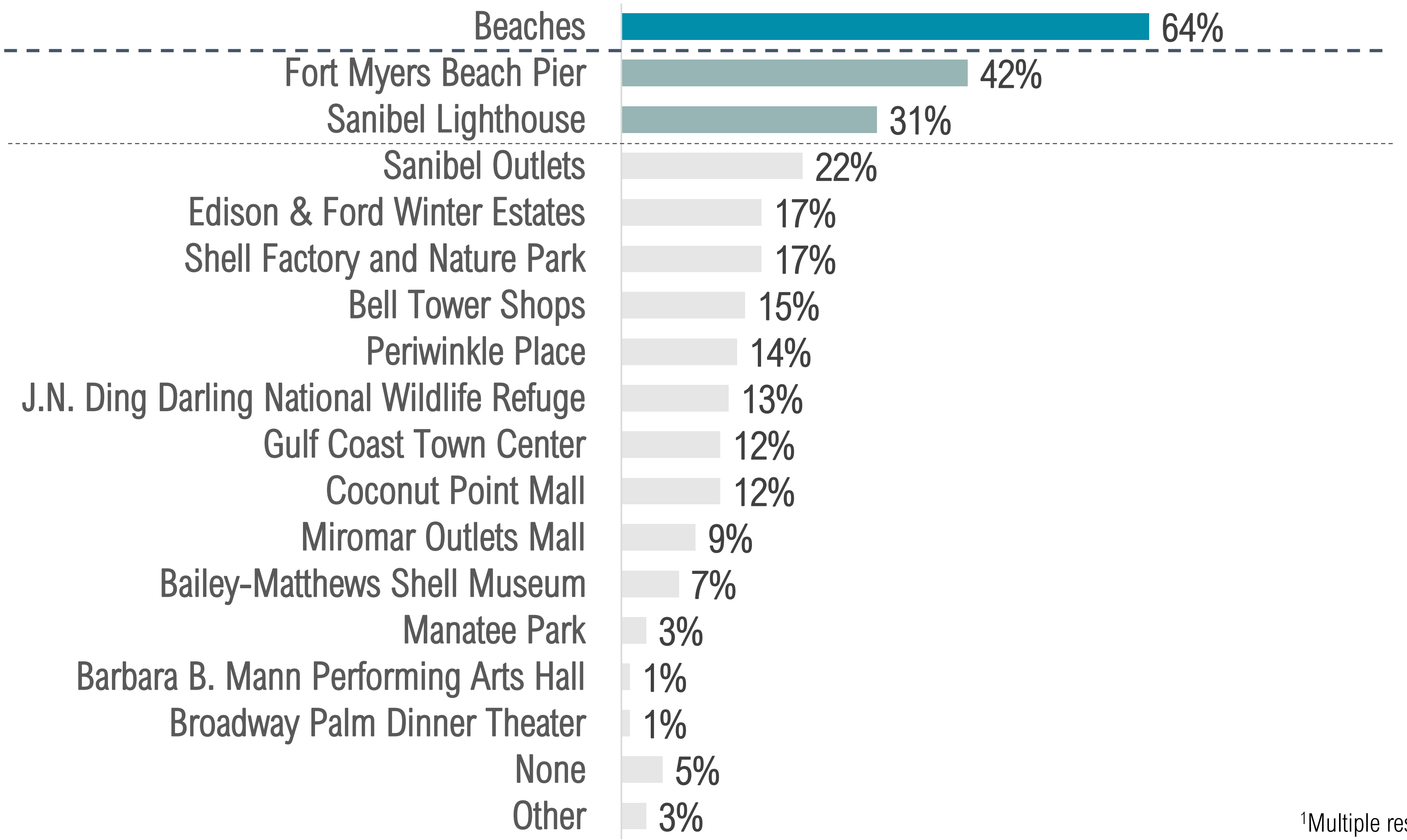

[1]Multiple responses permitted.

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



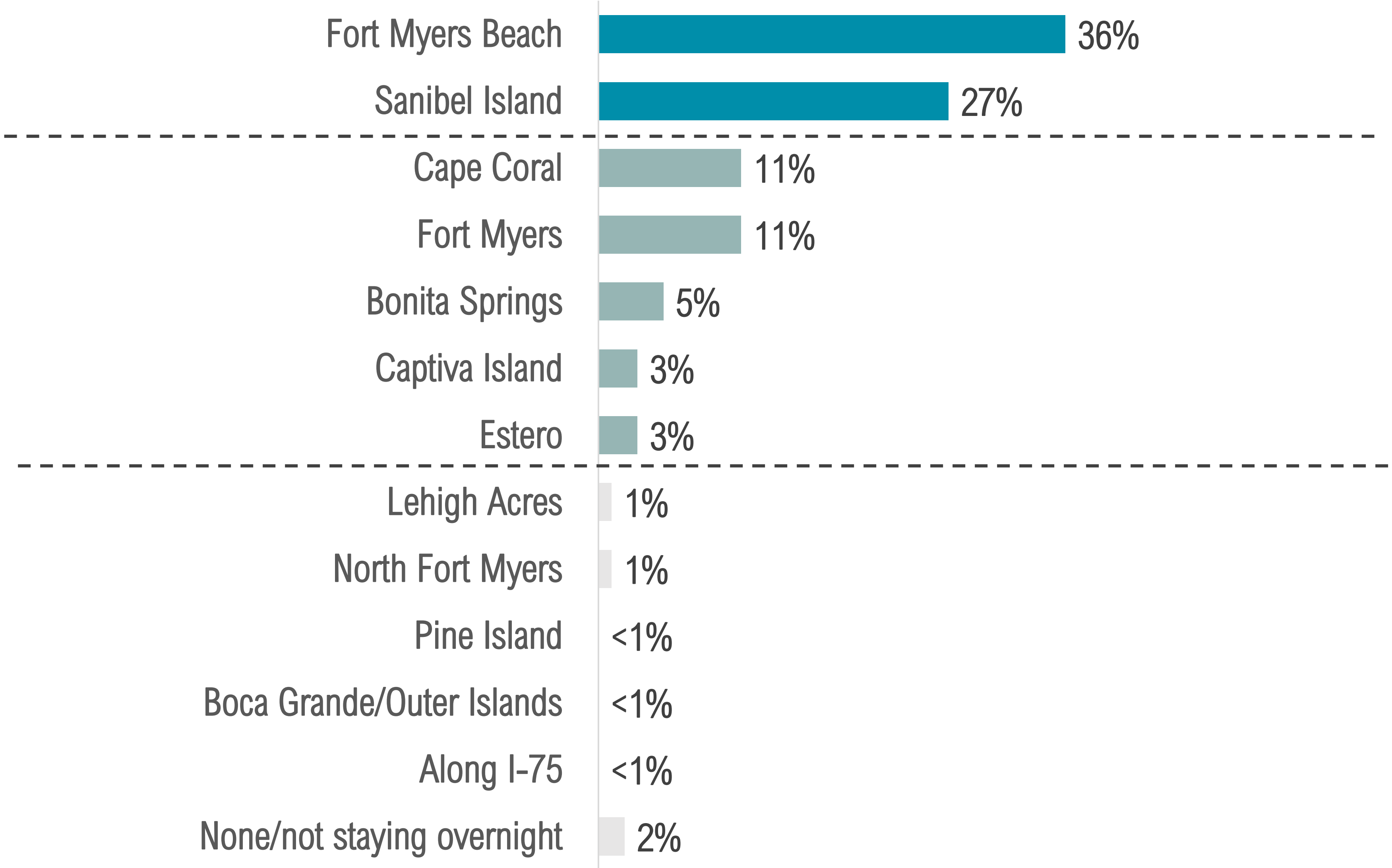

[1]Three responses permitted.
[2]Multiple responses permitted.

# ATTRACTIONS VISITED[1]




[1]Multiple responses permitted.

# COMMUNITY STAYED



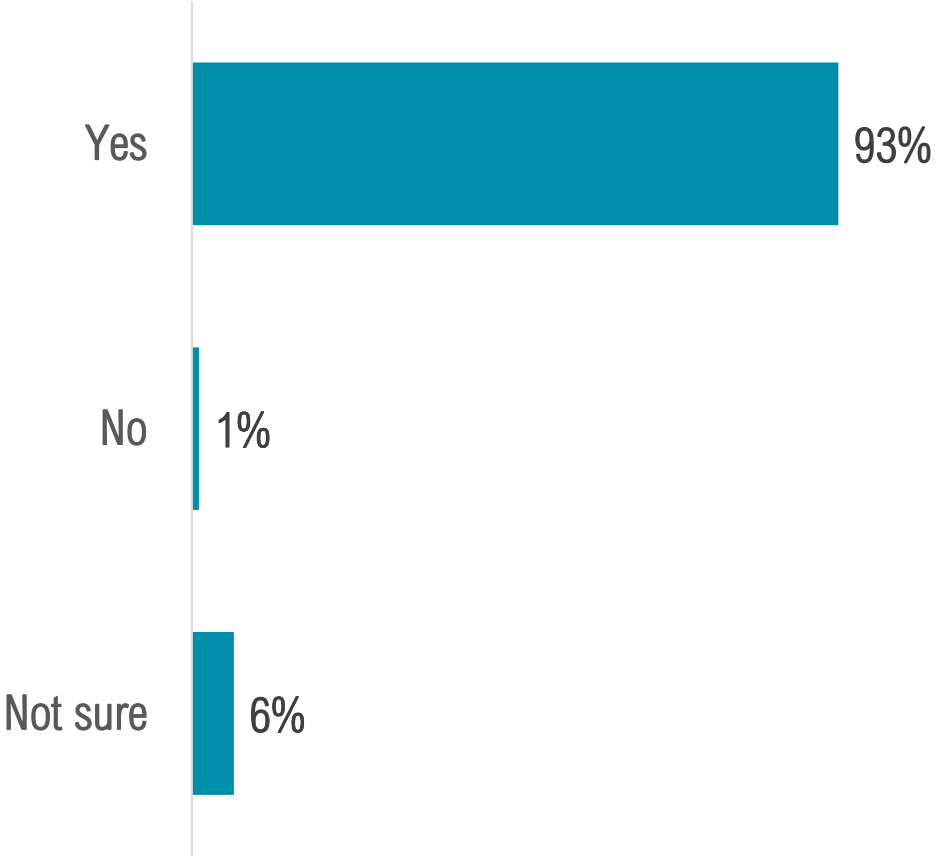



fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

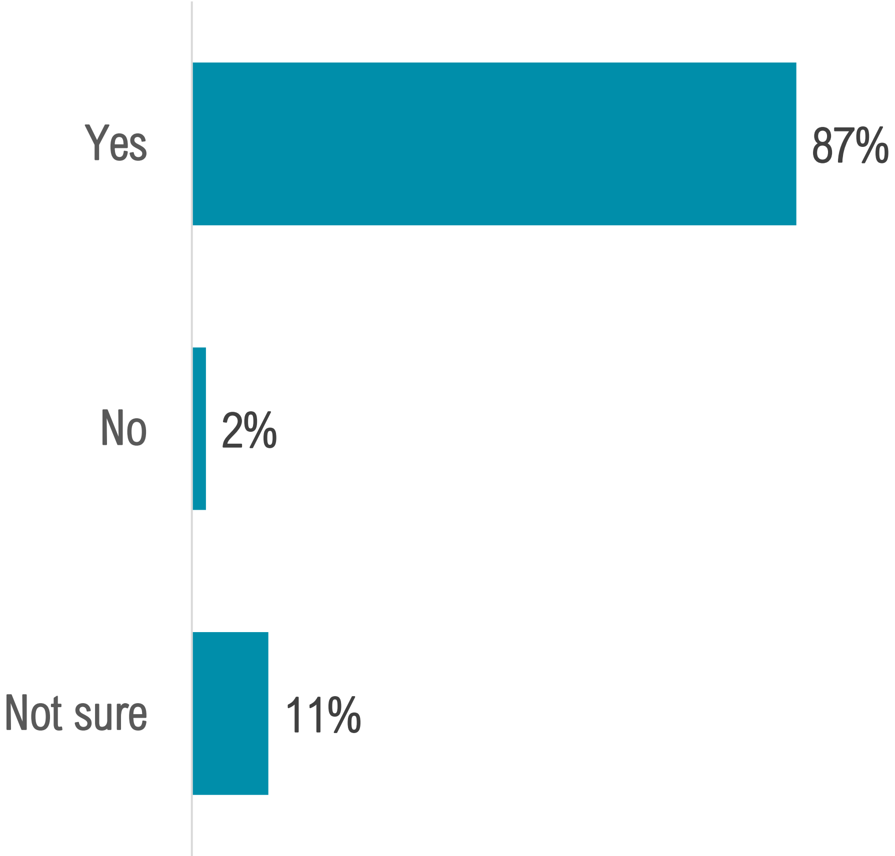
downs & st. germain RESEARCH

# VISITOR JOURNEY: POST-TRIP EVALUATION

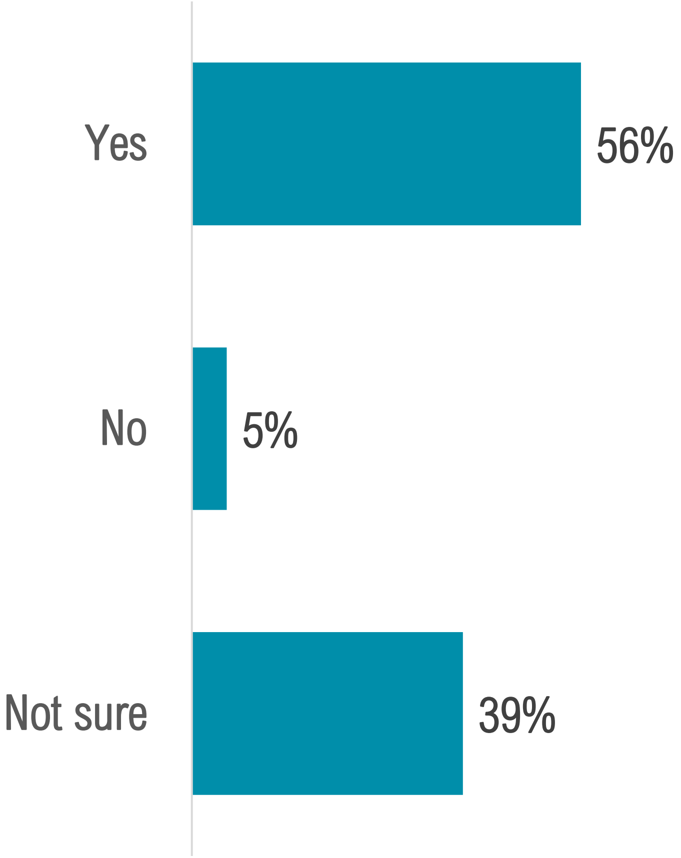
# LIKELY TO RECOMMEND



# LIKELY TO RETURN

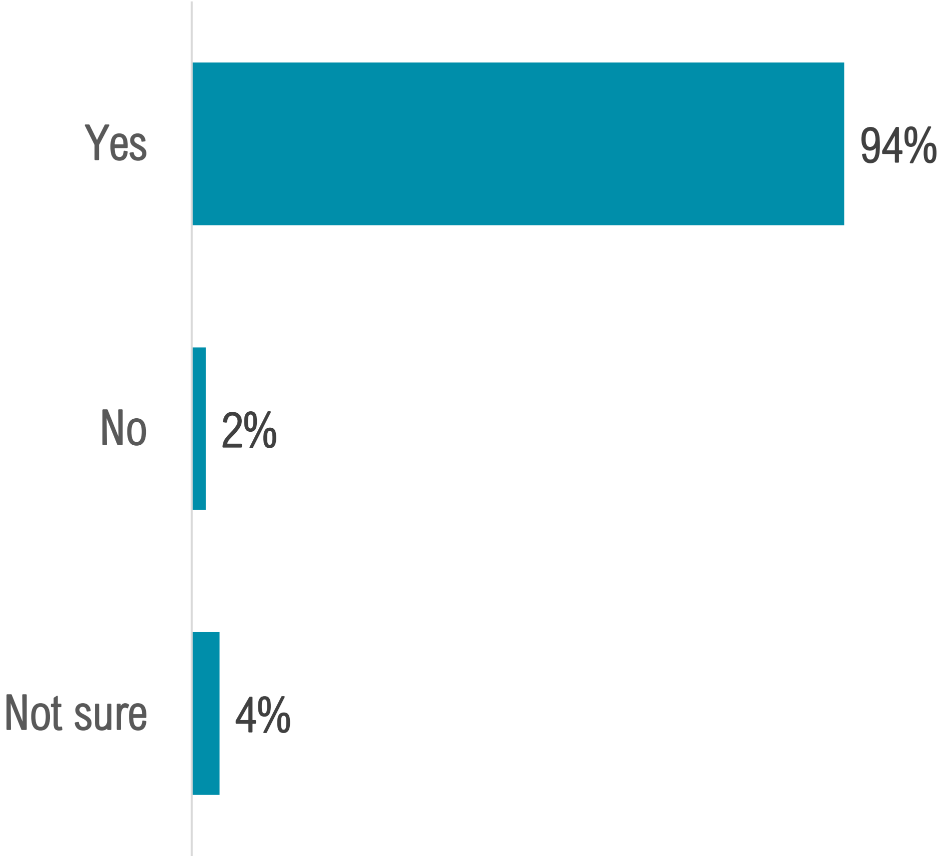


# LIKELY TO RETURN NEXT YEAR



# FEEL WELCOME



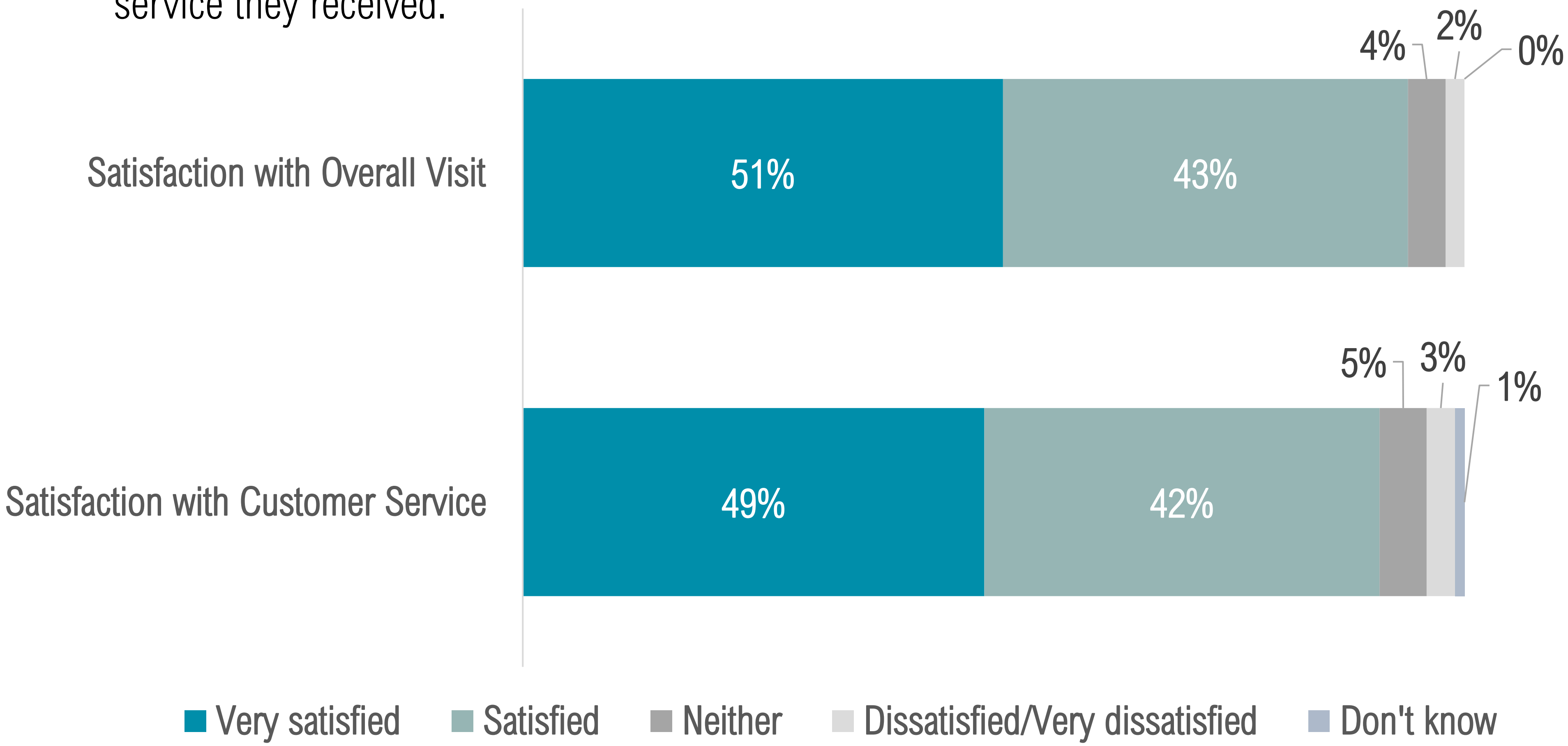


# SATISFACTION RATINGS

| | 1st Time Visitors | | Repeat Visitors | | U.S. Residents | | International Residents | |
|---|---|---|---|---|---|---|---|---|
| | 2021 | 2022 | 2021 | 2022 | 2021 | 2022 | 2021 | 2022 |
| Likely to Recommend | 93% | 89% | 98% | 97% | 96% | 93% | 95% | 95% |
| Likely to Return | 83% | 79% | 94% | 93% | 90% | 88% | 80% | 80% |
| Likely to Return Next Year | 36% | 39% | 63% | 67% | 54% | 56% | 33% | 52% |

# SATISFACTION

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



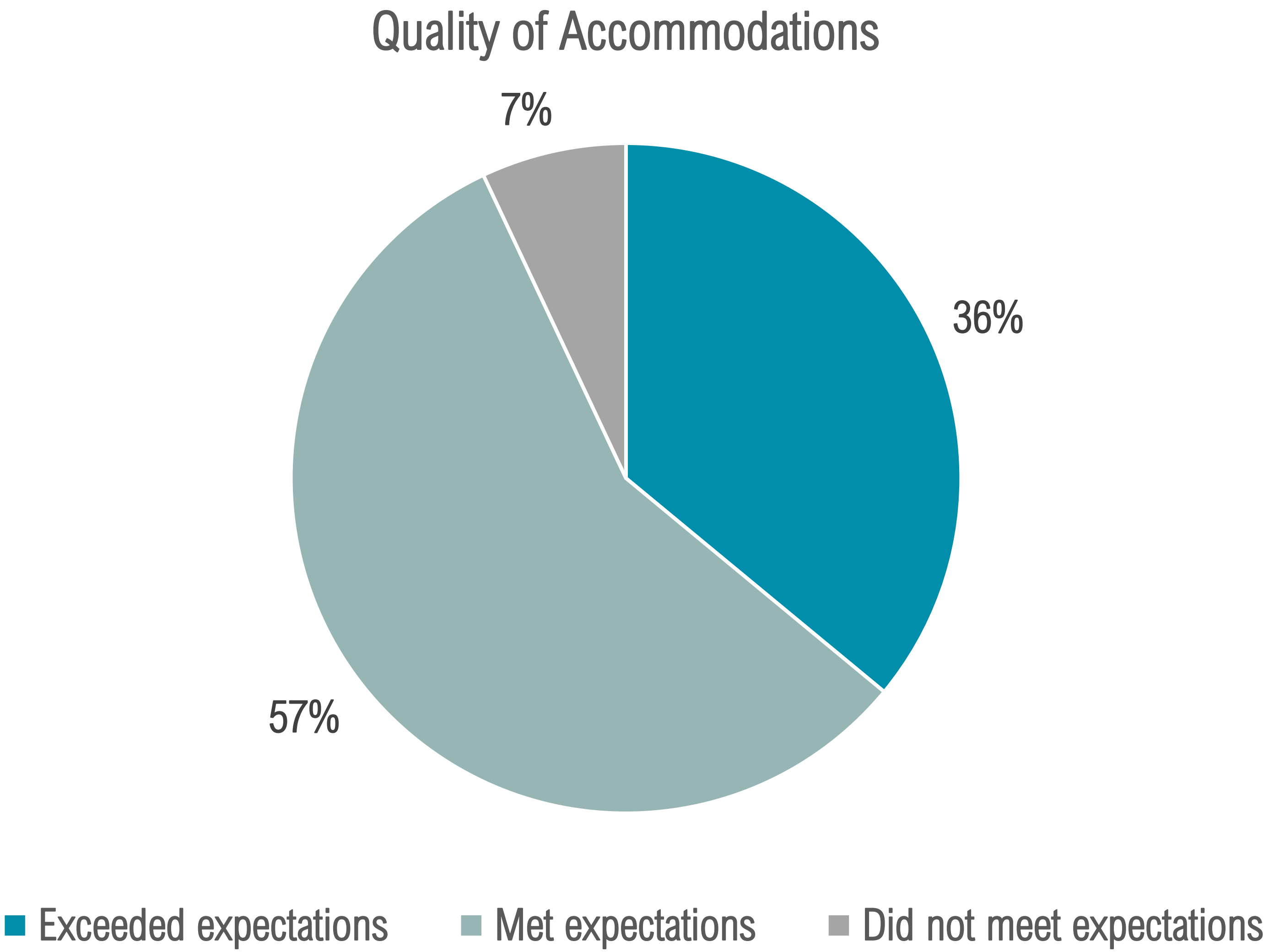
# SATISFACTION RATINGS: OVERALL VISIT

| | 1st Time Visitors | | Repeat Visitors | | U.S. Residents | | International Residents | |
|---|---|---|---|---|---|---|---|---|
| | 2021 | 2022 | 2021 | 2022 | 2021 | 2022 | 2021 | 2022 |
| Very Satisfied | 56% | 41% | 73% | 60% | 67% | 52% | 48% | 45% |
| Satisfied | 40% | 50% | 24% | 37% | 30% | 42% | 47% | 52% |

# SATISFACTION RATINGS: CUSTOMER SERVICE

| | 1st Time Visitors | | Repeat Visitors | | U.S. Residents | | International Residents | |
|---|---|---|---|---|---|---|---|---|
| | 2021 | 2022 | 2021 | 2022 | 2021 | 2022 | 2021 | 2022 |
| Very Satisfied | 54% | 39% | 64% | 57% | 60% | 49% | 44% | 31% |
| Satisfied | 40% | 48% | 30% | 37% | 34% | 41% | 43% | 62% |

# SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

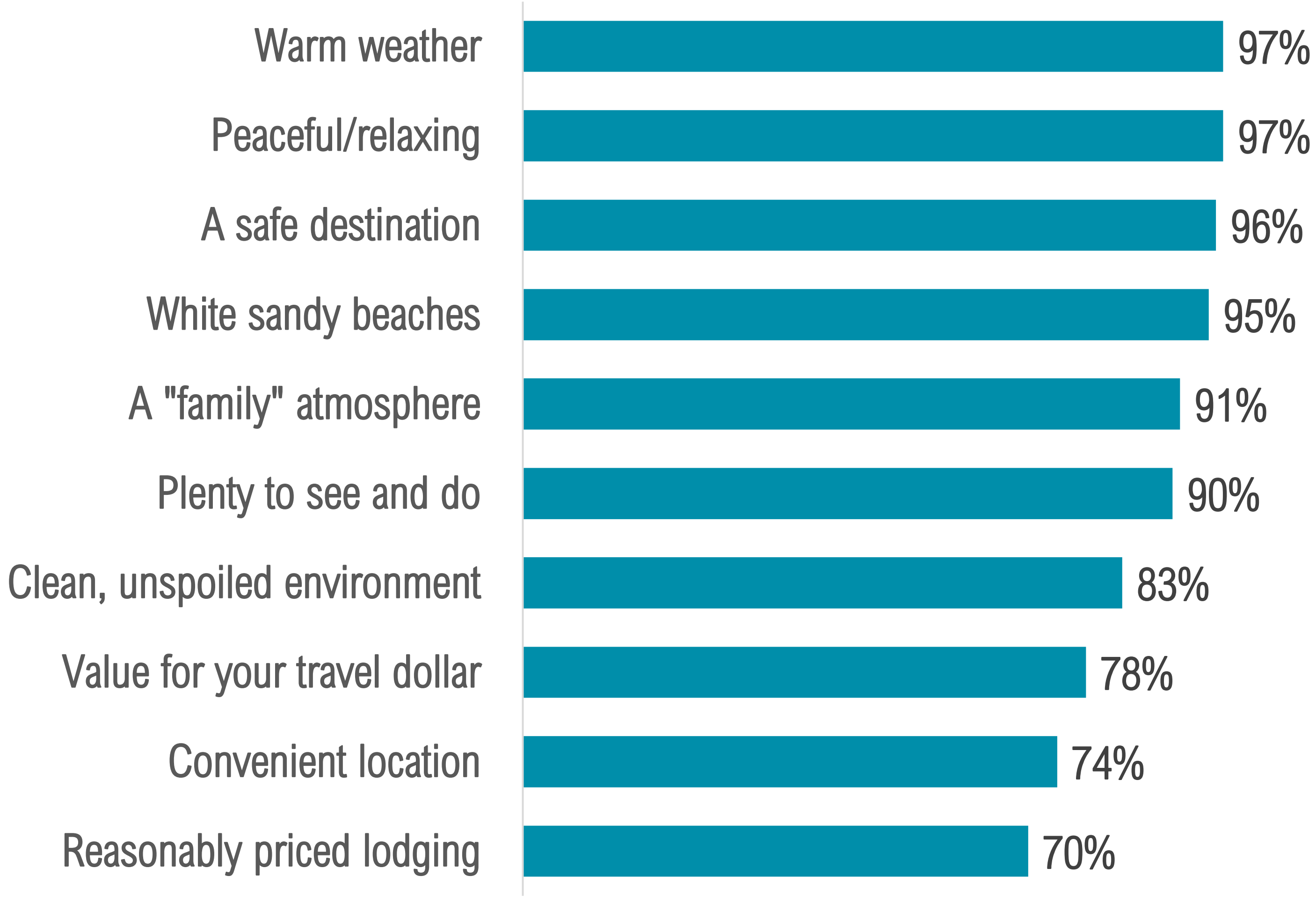


# SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

| | 1st Time Visitors | | Repeat Visitors | | U.S. Residents | | International Residents | |
|---|---|---|---|---|---|---|---|---|
| | 2021 | 2022 | 2021 | 2022 | 2021 | 2022 | 2021 | 2022 |
| Exceeded Expectations | 34% | 33% | 43% | 41% | 39% | 34% | 32% | 46% |
| Met Expectations | 61% | 58% | 52% | 55% | 57% | 58% | 61% | 51% |
| Did Not Meet Expectations | 5% | 9% | 5% | 4% | 4% | 7% | 7% | 4% |

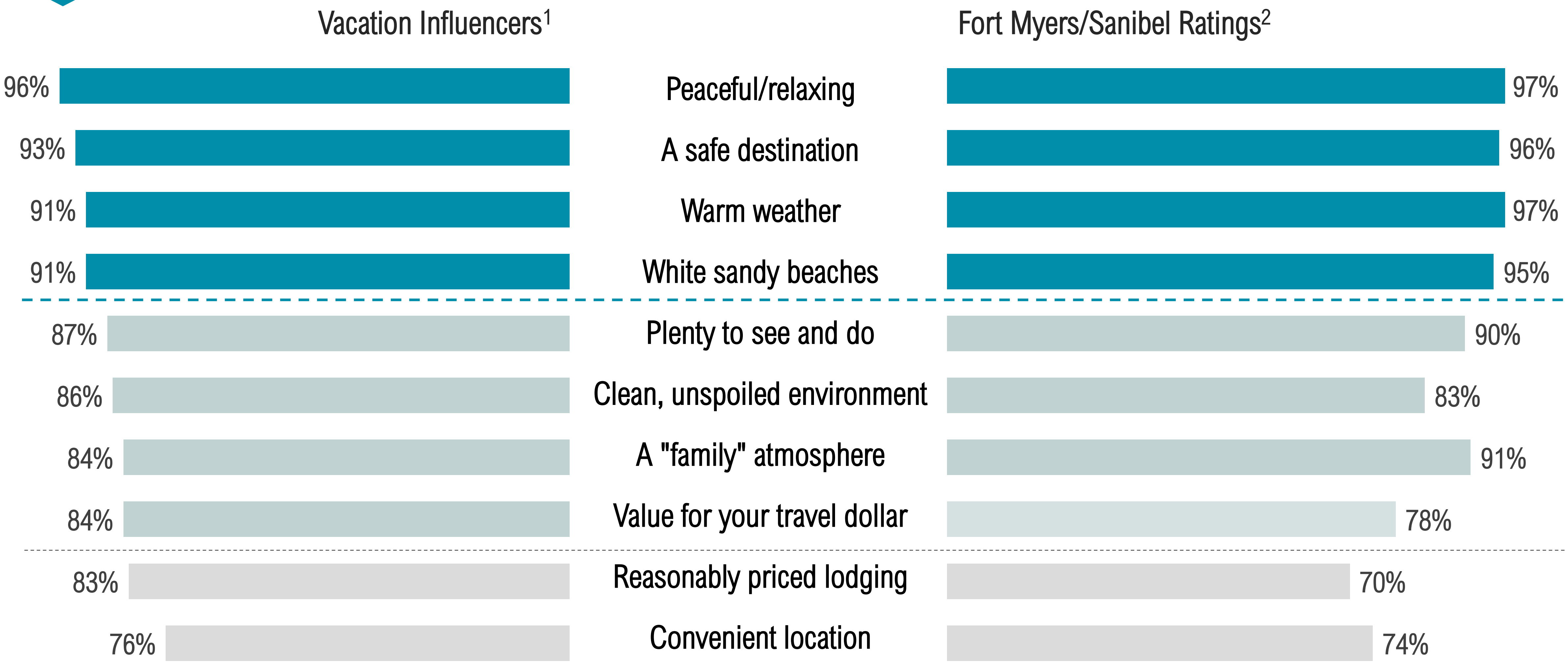
# ATTRIBUTE RATINGS[1]

At least **90%** of visitors gave high attribute ratings for **warm weather, peacefulness, safety, white sandy beaches, a “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.

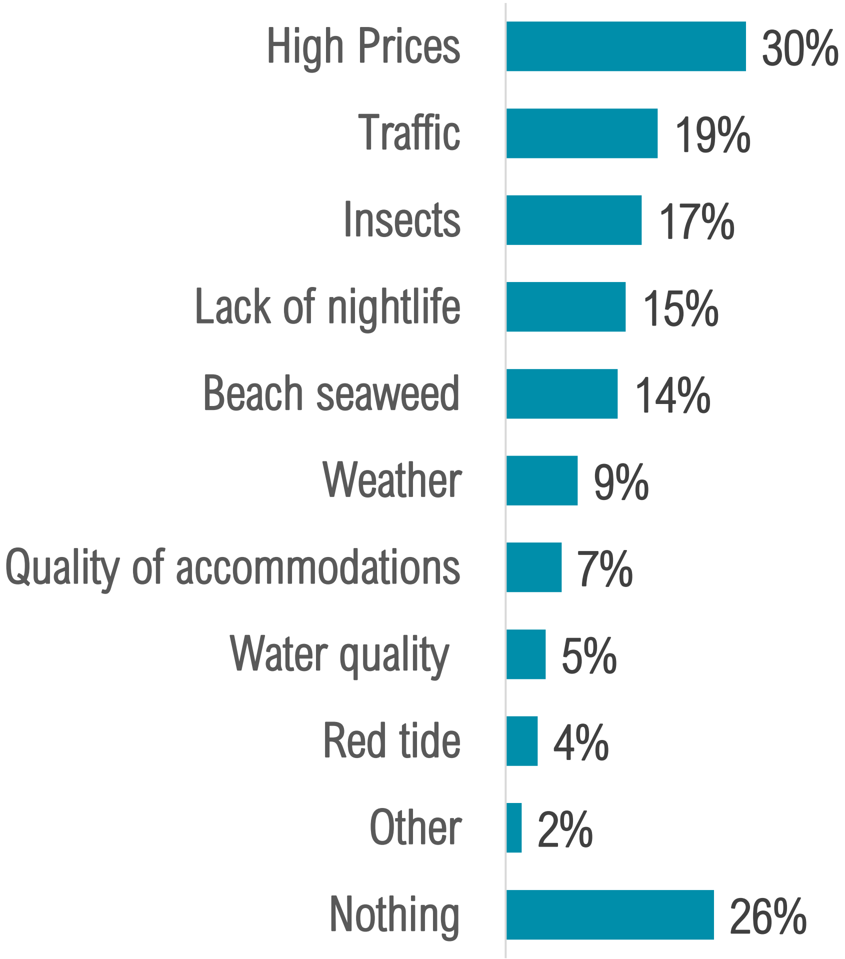
[2]Top 2 box scores. Attributes rated on a scale from 1 to 5 where 1 is Poor and 5 is Excellent.

Post-Trip Evaluation

July - September 2022

# LEAST LIKED FEATURES[1]

3 in 10 visitors were concerned about high prices, while nearly 1 in 5 were concerned with traffic and insects during their visit.




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

# AREA DESCRIPTIONS

## Beautiful Beaches

- “It is like heaven on earth. The sand is soft, the water is warm, and the sunsets cannot be beat.”
- “It is so beautiful. I love the tides and color of the ocean, which is just fascinating to view.”
- “Our favorite vacation to go on each year! The perfect weather and gorgeous beaches the unbelievable sunsets, great restaurants, friends and happy hour. Nothing beats it!”

## Wonderful Place to Visit

- “The Fort Myers and Sanibel area is a wonderful place to relax with family and friends of all ages. Plenty to do or just relax, which ever you want to do.”
- “Definitely a place you want to vacation! there is great weather, unbelievable beaches and plenty to see and do.”

# AREA DESCRIPTIONS

## Warm Weather

- "Always a tremendous vacation in our favorite area to visit. The weather is perfect, and the water is phenomenal with plenty to see and do."
- "We had a great time on our annual vacation! There was perfect weather as well as the crystal-clear Gulf of Mexico with its gorgeous beaches and great restaurants and shopping."
- "Great weather and terrific accommodations. Beach was great also."

## Relaxing & Peaceful

- "Lovely location to spend time relaxing. The beaches are beautiful, peaceful, and full of sea life. Beyond great quality for price!"
- "Beautiful beaches and convenient restaurants within walking distance. Hoping they will be able to rebuild this wonderful vacation destination after the hurricane damage."

# OCCUPANCY BAROMETER[1]: OCT – DEC RESERVATIONS

| Oct – Dec Reservations | Oct – Dec 2021 | Oct – Dec 2022 |
|---|---|---|
| Up | 82% | 27% |
| Same | 9% | 2% |
| Down | 7% | 71% |
| Not Sure | 2% | 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?"

# OCCUPANCY BAROMETER[1]: JAN – MAR RESERVATIONS

| Oct – Dec Reservations | Jan – Mar 2021 | Jan – Mar 2022 |
|---|---|---|
| Up | 70% | 25% |
| Same | 14% | 15% |
| Down | 13% | 55% |
| Not Sure | 3% | 5% |

[1]Sources: Occupancy Survey
Accommodations partners were asked the following, "Please think about your reservations for the next three months. Compared to January through March of 2022, would you say the total level of reservations are up, the same, or down?"

# Year-Over-Year Comparisons

# ECONOMIC IMPACT

| Visitor & Lodging Statistics | July - September 2021 | July - September 2022 | % Change '21 – '22 |
|---|---|---|---|
| Visitors[1] | 1,162,800 | 1,199,100 | + 3.1% |
| Room Nights[1] | 1,294,000 | 1,457,300 | + 12.6% |
| Direct Expenditures[2] | $767,613,500 | $854,982,500 | +11.4% |
| Total Economic Impact[3] | $1,223,575,900 | $1,361,987,100 | +11.4% |
| Occupancy | 55.8% | 55.2% | -1.1% |
| ADR | $139.36 | $151.82 | + 8.9% |
| RevPAR | $77.82 | $83.80 | + 7.8% |

[1] Visitors and room nights are up, in part, due to increases in TP Size and LOS, but also in part due to our utilization of 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

| | July - September 2021 | July - September 2022 | % Change '21 – '22 |
|---|---|---|---|
| Direct Jobs | 10,317 | 10,961 | + 6.2% |
| Total Jobs | 14,162 | 15,133 | + 6.9% |
| Direct Wages | $231,109,400 | $257,590,881 | + 11.5% |
| Total Wages | $379,535,100 | $438,862,510 | + 15.6% |
| Direct Local Taxes | $23,412,200 | $25,649,475 | + 9.6% |
| Total Local Taxes | $41,356,900 | $45,626,568 | + 10.3% |
| Direct State Taxes | $54,577,300 | $60,703,758 | + 11.2% |
| Total State Taxes | $80,144,200 | $88,529,162 | + 10.5% |

# VISITOR TYPE

| Visitor Type | July - September 2021 | July - September 2022 |
|---|---|---|
| Visitors in Paid Accommodations | 74% | 76% |
| Visitors in Non-Paid Accommodations | 24% | 22% |
| Day Trippers | 2% | 2% |

# PRE-VISIT

| Planned trip in advance | July - September 2021 | July - September 2022 |
|---|---|---|
| 1 week or less | 6% | 4% |
| 2-4 weeks | 9% | 7% |
| 1-2 months | 34% | 42% |
| 3-6 months | 34% | 34% |
| 6 months or more | 17% | 12% |
| Not sure | 0% | 1% |

| Considered Other Destinations | July - September 2021 | July - September 2022 |
|---|---|---|
| Yes | 36% | 54% |
| No | 64% | 46% |

# PRE-VISIT

| Other destinations considered[1] | July - September 2021[2] | July - September 2022[3] |
|---|---|---|
| Other destinations outside of Florida | 9% | 22% |
| Ft. Lauderdale | 2% | 7% |
| Other destinations in Florida | 4% | 6% |
| Orlando | 4% | 4% |
| Tampa – Clearwater – St. Petersburg | 4% | 4% |
| Daytona | 2% | 4% |
| Keys – Key West | 2% | 3% |
| Sarasota | 3% | 3% |
| West Palm Beach | 1% | 3% |
| Miami | 1% | 2% |
| Naples | 1% | 1% |

[1]Multiple responses permitted.
[2]Base: 36% of visitors who considered other destinations.
[3]Base: 54% of visitors who considered other destinations.

# PRE-VISIT

| Trip Planning Websites/Apps[1] | July - September 2021 | July - September 2022 |
|---|---|---|
| Online search engines | 36% | 38% |
| Airline websites/apps | 22% | 34% |
| Airbnb, VRBO, HomeAway etc. | 30% | 24% |
| Traveler reviews, blogs, stories | 16% | 22% |
| Booking websites | 20% | 20% |
| Vacation rental websites/apps | 15% | 19% |
| Visit Florida | 5% | 14% |
| Trip Advisor | 15% | 13% |
| Hotel websites/apps | 15% | 12% |
| Facebook | 7% | 11% |
| VCB Facebook Page | 15% | 9% |
| www.VisitFortMyers.com | 8% | 8% |
| Instagram | 3% | 7% |
| YouTube, Hulu, Pandora | 3% | 3% |
| None | 16% | 7% |
| Other | 5% | 3% |

[1]Multiple responses permitted.

# PRE-VISIT

| Information Requests[1] | July - September 2021 | July - September 2022 |
|---|---|---|
| Calling a hotel, motel, condo | 30% | 47% |
| Requesting and receiving a visitor guide | 8% | 16% |
| Calling the VCB | 2% | 11% |
| Receiving the VCB e-newsletter | 1% | 4% |
| Calling a local Chamber of Commerce | 1% | 3% |
| Other | 3% | 2% |
| None | 63% | 42% |

[1]Multiple responses permitted.

# PRE-VISIT



| Recall of Lee County Promotions | July - September 2021 | July - September 2022 |
|---|---|---|
| Yes | 42% | 55% |
| No | 44% | 30% |
| Can't recall | 14% | 15% |
| % of recallers influenced by promotions | - | 53% |
| % of total visitors influenced by promotions | - | 29% |

# PRE-VISIT

| Type of Promotions Recalled[1] | July - September 2021[2] | July - September 2022[3] |
|---|---|---|
| Internet | 46% | 66% |
| Social media | 38% | 36% |
| Traveler reviews, blogs | 22% | 34% |
| Television | 14% | 8% |
| Travel/visitor guide | 9% | 7% |
| www.VisitFortMyers.com | 9% | 7% |
| Magazine | 8% | 6% |
| Brochure | 4% | 5% |
| AAA | 5% | 5% |
| Billboard | 1% | 3% |
| Deal-based promotion | 3% | 3% |
| Radio | 2% | 2% |
| Newspaper | 3% | 2% |
| Other | 4% | 2% |

[1]Multiple responses permitted.
[2]Base: 42% of visitors who considered other destinations.
[3]Base: 54% of visitors who considered other destinations.

# PRE-VISIT

| Characteristics influencing decision to visit Lee County (top 2 boxes)[1] | July - September 2021 | July - September 2022 |
|---|---|---|
| Peaceful/relaxing | 92% | 96% |
| A safe destination | 91% | 93% |
| Warm weather | 88% | 91% |
| White sandy beaches | 87% | 91% |
| Plenty to see and do | 82% | 87% |
| Clean, unspoiled environment | 87% | 86% |
| A "family" atmosphere | 80% | 84% |
| Value for your travel dollar | 80% | 84% |
| Reasonably priced lodging | 77% | 83% |
| Convenient location | 82% | 76% |

[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.

# PRE-VISIT

| Main Reason for Visiting[1] | July - September 2021 | July - September 2022 |
|---|---|---|
| Vacation | 67% | 69% |
| Beach | 62% | 66% |
| Relax & unwind | 43% | 38% |
| Visiting friends & relatives | 16% | 12% |
| Fishing | 6% | 7% |
| Nature, environment, bird watching | 8% | 5% |
| Shopping | 3% | 5% |
| Water sports | 7% | 5% |
| Special occasion | 4% | 4% |
| Golf or tennis | 1% | 3% |
| Photography | 2% | 3% |
| Attractions | 1% | 2% |
| Biking, hiking | 2% | 2% |
| Diving, snorkeling | 1% | 2% |
| Special event | 1% | 1% |
| Sporting event | <1% | 1% |
| Business meetings/conferences | 1% | 1% |
| Culture | 1% | 1% |
| Museums, history | <1% | 1% |
| Guided tours | <1% | 1% |
| Volunteering | <1% | 1% |
| Other | 5% | 3% |

[1]Multiple responses permitted.

# PRE-VISIT

| Transportation | July - September 2021 | July - September 2022 |
|---|---|---|
| Fly | 74% | 78% |
| Drive a personal vehicle | 21% | 18% |
| Drive a rental vehicle | 2% | 2% |
| Drive a RV | 1% | 1% |
| Travel by bus | 1% | 1% |
| Other | 1% | 0% |

| Airport Used | July - September 2021 | July - September 2022 |
|---|---|---|
| Southwest Florida International | 85% | 85% |
| Punta Gorda | 5% | 7% |
| Ft. Lauderdale International | 2% | 4% |
| Tampa International | 3% | 2% |
| Miami International | 3% | 1% |
| Orlando International | 2% | 1% |
| Other | 0% | 0% |

# TRAVEL PARTY PROFILE

| Visitor Origin[1] | July - September 2021 | July - September 2022 |
|---|---|---|
| Florida | 10% | 14% |
| Southeast | 18% | 18% |
| Northeast | 16% | 14% |
| Midwest | 41% | 34% |
| West | 9% | 8% |
| Canada | 4% | 7% |
| United Kingdom | <1% | <1% |
| Germany | <1% | 2% |
| Other Europe | 1% | 2% |
| Other International | 1% | 1% |

| Visitor Origin[1] | July - September 2021 | July - September 2022 |
|---|---|---|
| Miami – Fort Lauderdale | 8% | 6% |
| Chicago | 4% | 4% |
| Cleveland – Akron | 4% | 4% |
| Tampa – St. Petersburg | 4% | 3% |
| Atlanta | 2% | 3% |
| Cincinnati | 1% | 3% |
| Louisville | 1% | 3% |

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

# TRAVEL PARTY PROFILE

| Travel Parties | July - September 2021 | July - September 2022 |
|---|---|---|
| Mean travel party size | 3.0 | 3.2 |
| Travel with children under age 18 | 49% | 56% |

| Travel Party Composition | July - September 2021 | July - September 2022 |
|---|---|---|
| As a family | 60% | 64% |
| As a couple | 26% | 24% |
| With other couples/friends | 8% | 7% |
| By yourself | 4% | 4% |
| 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 | July - September 2021 | July - September 2022 |
|---|---|---|
| Married | 72% | 69% |
| Single | 28% | 31% |

| Age | July - September 2021 | July - September 2022 |
|---|---|---|
| Average age | 49 | 52 |
| Median age | 48 | 43 |

| Household Income | July - September 2021 | July - September 2022 |
|---|---|---|
| Median Income | $106,300 | $108,600 |

# TRAVEL PARTY PROFILE

| Race/Ethnicity | July - September 2021 | July - September 2022 |
|---|---|---|
| Caucasian or white | 78% | 78% |
| Hispanic | 12% | 11% |
| Asian | 3% | 3% |
| African American or black | 2% | 2% |
| Other | 5% | 6% |

| Gender[1] | July - September 2021 | July - September 2022 |
|---|---|---|
| Female | 55% | 46% |
| Male | 45% | 54% |

[1]Gender of person interviewed.

# TRIP EXPERIENCE

| Length of Stay | July - September 2021 | July - September 2022 |
|---|---|---|
| Average nights in the Fort Myers area | 5.0 | 5.2 |

| First Time/Repeat Visitors | July - September 2021 | July - September 2022 |
|---|---|---|
| First-time | 40% | 42% |
| Repeat | 60% | 58% |

[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

| Type of Accommodations | July - September 2021 | July - September 2022 |
|---|---|---|
| Hotel/motel/resort/B&B | 30% | 39% |
| Condo/Vacation rental | 42% | 36% |
| Non-paid accommodations | 24% | 22% |
| Day tripper | 2% | 2% |
| Campground/RV Park | 2% | 1% |

# TRIP EXPERIENCE

| Activities[1] | July - September 2021 | July - September 2022 |
|---|---|---|
| Beach | 74% | 65% |
| Relax and unwind | 74% | 64% |
| Restaurants | 57% | 53% |
| Shopping | 36% | 42% |
| Water sports | 36% | 34% |
| Fishing | 29% | 28% |
| Nature, environment, bird watching | 31% | 26% |
| Visit friends/relatives | 31% | 25% |
| Biking, hiking | 20% | 22% |
| Bars, nightclubs | 14% | 12% |
| Diving, snorkeling | 8% | 11% |
| Golf or tennis | 7% | 8% |
| Spas | 5% | 8% |
| Photography | 13% | 8% |
| Attractions | 11% | 6% |
| Guided tours | 7% | 5% |
| Special occasion | 5% | 4% |
| Culture | 4% | 3% |
| Museums, history | 5% | 3% |
| Special events | 2% | 3% |
| Attend or participate in a sporting event | 1% | 3% |
| Business meetings/conferences | 1% | 1% |
| Volunteering | 0% | 1% |
| Other | 3% | 1% |

[1]Multiple responses permitted.

# TRIP EXPERIENCE

| Attractions[1] | July - September 2021 | July - September 2022 |
|---|---|---|
| Beaches | 74% | 64% |
| Fort Myers Beach Pier | 41% | 42% |
| Sanibel Lighthouse | 31% | 31% |
| Sanibel Outlets | 18% | 22% |
| Edison & Ford Winter Estates | 14% | 17% |
| Shell Factory and Nature Park | 16% | 17% |
| Bell Tower Shops | 16% | 15% |
| Periwinkle Place | 16% | 14% |
| J.N. Ding Darling National Wildlife Refuge | 15% | 13% |
| Gulf Coast Town Center | 12% | 12% |
| Coconut Point Mall | 11% | 12% |
| Miromar Outlets Mall | 9% | 9% |
| Bailey-Matthews Shell Museum | 9% | 7% |
| Manatee Park | 3% | 3% |
| Barbara B. Mann Performing Arts Hall | 1% | 1% |
| Broadway Palm Dinner Theater | 1% | 1% |
| None | 8% | 5% |
| Other | 5% | 3% |

[1]Multiple responses permitted.

# TRIP EXPERIENCE

| Area stayed | July - September 2021 | July - September 2022 |
|---|---|---|
| Fort Myers Beach | 34% | 36% |
| Sanibel Island | 27% | 27% |
| Cape Coral | 13% | 11% |
| Fort Myers | 8% | 11% |
| Bonita Springs | 4% | 5% |
| Captiva Island | 5% | 3% |
| Estero | 2% | 3% |
| Lehigh Acres | 1% | 1% |
| North Fort Myers | 1% | 1% |
| Pine Island | 1% | <1% |
| Boca Grande/Outer Islands | 1% | <1% |
| Along I-75 | 1% | <1% |
| None/not staying overnight | 1% | 2% |

# POST-TRIP EVALUATION

| Loyalty Metrics | July - September 2021 | July - September 2022 |
|---|---|---|
| Likely to recommend | 96% | 93% |
| Likely to return | 89% | 87% |
| Likely to return next year | 53% | 56% |

| Satisfaction with Accommodations | July - September 2021 | July - September 2022 |
|---|---|---|
| Exceeded expectations | 37% | 36% |
| Met expectations | 58% | 57% |
| Did not meet expectations | 5% | 7% |

# POST-TRIP EVALUATION

| Satisfaction with Visit | July - September 2021 | July - September 2022 |
| --- | --- | --- |
| Very satisfied | 66% | 51% |
| Satisfied | 31% | 43% |
| Somewhat satisfied | 2% | 4% |
| Dissatisfied | 1% | 2% |
| Very dissatisfied | 0% | 0% |
| Don't know/no opinion | 1% | 0% |

| Satisfaction with Customer Service | July - September 2021 | July - September 2022 |
| --- | --- | --- |
| Very satisfied | 60% | 49% |
| Satisfied | 34% | 42% |
| Somewhat satisfied | 4% | 5% |
| Dissatisfied | 1% | 3% |
| Very dissatisfied | 0% | 0% |
| Don't know/no opinion | 1% | 1% |

# POST-TRIP EVALUATION

| Visitor Concerns[1] | July - September 2021 | July - September 2022 |
|---|---|---|
| High Prices | 24% | 30% |
| Traffic | 16% | 19% |
| Insects | 25% | 17% |
| Lack of nightlife | 7% | 15% |
| Beach seaweed | 14% | 14% |
| Weather | 8% | 9% |
| Quality of accommodations | 4% | 7% |
| Water quality | 6% | 5% |
| Red tide | 8% | 4% |
| Other | 2% | 2% |
| Nothing | 31% | 26% |

[1]Multiple responses permitted.

# Methodology

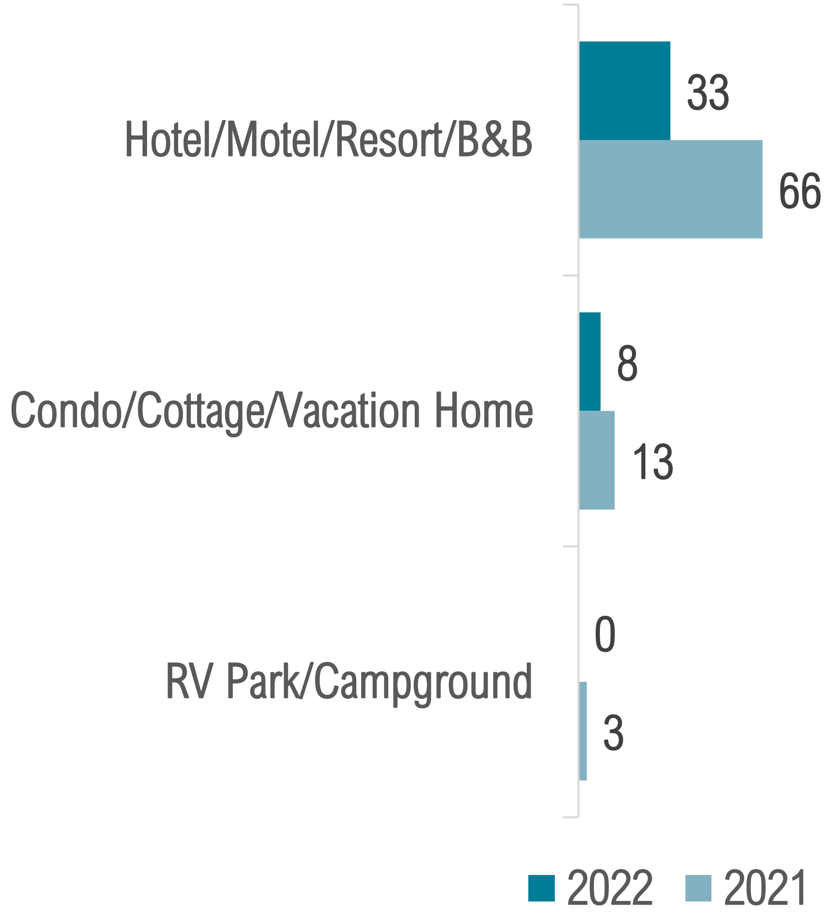
# METHODOLOGY

- 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: 871 completed interviews
    - Target individuals: July - September visitors to Lee County
    - Data Collection: July – September 2022
  - Occupancy Study
    - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc., and the STR Report
    - Sample Size – data from 4,205 hotel/rental/campground units (41 properties) reporting to DSG, 9,843 hotel units reporting to STR (82 properties), and 2,892 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[1]
  - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc.
    - Sample Size – 41 completed interviews
    - Data Collection: Completed in Oct/Nov 2022 (for July - September 2022)
  - Total Sample Size – data from 4,205 hotel/rental/campground units reporting to DSG, 9,843 hotel units reporting to STR (representing 82 properties), and 2,892 rental units reporting to Key Data

## Number of Interviews




[1]RV/Campground data was modeled due to Occupancy Study difficulties following Hurricane Ian.

# METHODOLOGY

- 871 visitor interviews were completed in the following areas:

| | |
|---|---|
| 272 | Fort Myers Beach: The Pier, Times Square |
| 303 | Fort Myers: Centennial Park, RSW, Edison-Ford Winter Estates, Hampton Inn & Suites Fort Myers |
| 157 | Sanibel: Lighthouse Beach, Sanibel Moorings Resort |
| 89 | Cape Coral/North Fort Myers: Yacht Club Community Park |
| 50 | Bonita Springs: Bonita Beach, Estero |

# Fort Myers – Islands, Beaches and Neighborhoods

## Lee County VCB

## July - September 2022

Visitor Tracking, Occupancy, & Economic Impact Study

Tamara Pigott, CDME
Executive Director

Downs & St. Germain Research
contact@dsg-research.com
850-906-3111 | www.dsg-research.com