Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

October - December 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

October - December 2022

- Due to Hurricane Ian, the tourism metrics for the Fort Myers area were down across the board
- Although **hotel occupancy** was **up**, **vacation rental occupancy** was **down significantly**, causing **overall occupancy** to **decrease 19.8%** compared to Oct-Dec 2021
- **Visitation** was **down 51.3%** and **room nights** were **down 39.4%**
  - The drop in room nights was not as steep as the drop in visitation due to an increased length of stay
- The **proportion of visitors who stayed in unpaid accommodations increased significantly** due to decreases in the availability of paid accommodations for visitors to stay in as well as the holiday-season influx of people visiting friends/family
- The **proportion of international visitors increased by 71%.** Although, due to decreased visitation, this still represented a **27% decrease in terms of the number of international visitors**
- Compared to Oct-Dec 2021, **more visitors travelled** to the Fort Myers area **alone or with business associates.** This is likely due to the influx of recovery workers, volunteers, etc.
- RSW saw a **26% decrease in flight passengers** compared to Oct-Dec of 2021

55.1%	$152.64	$84.10
OCCUPANCY RATE	**AVERAGE DAILY RATE**	**REVENUE PER ROOM**
↓ 19.8% from 2021	↓ <0.1% from 2021	↓ 19.8% from 2021

fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

downs & st. germain RESEARCH

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

fort MYERS
ISLANDS, BEACHES & NEIGHBORHOODS

downs & st. germain RESEARCH

TOURISM SNAPSHOT: KEY METRICS October – December 2021 VS. 2022

Visitor & Lodging Statistics	Oct - Dec 2021	Oct - Dec 2022	% Change '21-'22
Visitors[1]	1,301,645	633,300	- 51.3%
Visitor Days[1]	7,398,289	4,965,072	- 32.9%
Room Nights[1]	1,779,960	1,078,500	- 39.4%
Direct Expenditures[2]	$959,551,600	$666,254,300	- 30.6%
Total Economic Impact[3]	$1,529,525,300	$1,061,343,100	- 30.6%

[1] Room nights are down less than the number of visitors. This is due to the decreased travel party size and increased length of stay.
[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	4,687,500	4,436,000	- 5.4%
Room Nights	6,394,800	6,270,500	- 1.9%
Direct Expenditures[1]	$3,729,946,900	$4,138,350,100	+ 10.9%
Total Economic Impact[2]	$5,945,535,400	$6,592,391,700	+ 10.9%

[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.

October – December LODGING STATISTICS

55.1%	$152.64	$84.10
Occupancy	ADR	RevPAR
↓19.8%	↓<0.1%	↓19.8%
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

- 3 in 10 visitors planned their trips to the Fort Myers area 3-6 months in advance

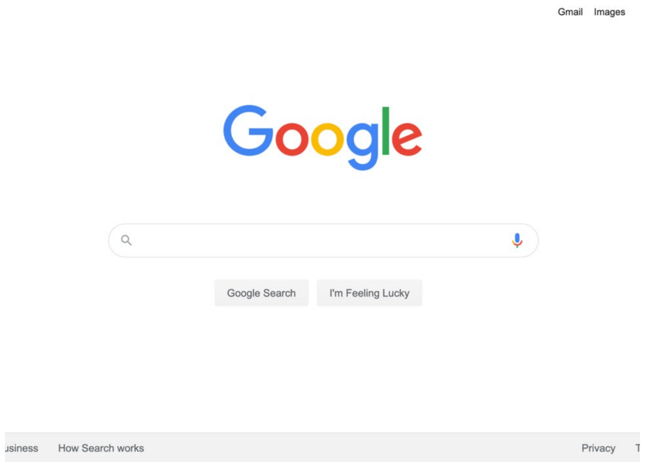
- Over 1 in 3 visitors requested information to plan their trips
  - Nearly 1 in 4 called a hotel, motel, or condo when planning their trips

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

TRIP PLANNING: WEBSITES/APPS USED

- More than 3 in 4 visitors used websites and apps to plan their trips to the Fort Myers area
- Top websites and apps used to plan their trips include[1]:

29% Airline websites/apps



26% Search engines

19% 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]:

85% Warm weather

82% Peaceful/relaxing

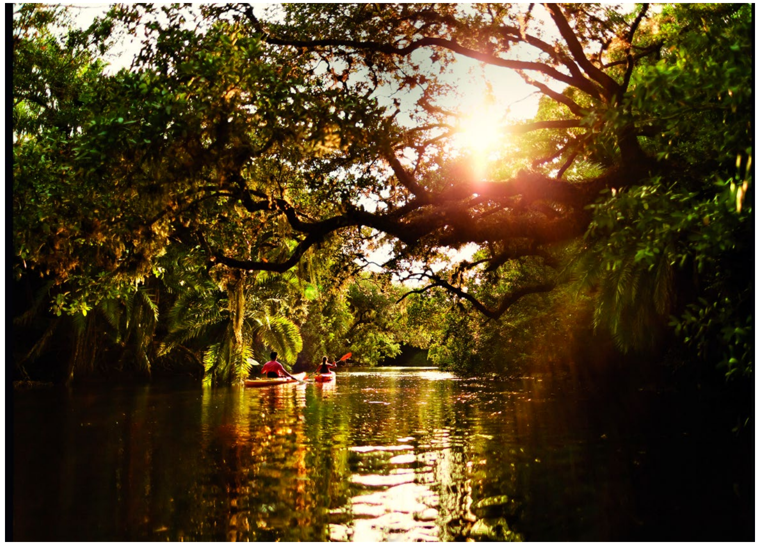
79% A safe destination

[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]:

38% Visiting friends & relatives



30% Relax & unwind

16% Checking-in on my property post-hurricane Ian

[1]Three responses permitted.

PROMOTIONS

- 40% of visitors **recalled promotions** in the past 6 months for the Fort Myers area
- 21% of all visitors **were influenced** to come to the Fort Myers area by these promotions
- Top sources of recall include[1]:

46% Internet

34% Social media

20% Traveler reviews, blogs

[1]Multiple responses permitted.

BOOKING

- Visitors used the following to book their trips:

44% Directly with hotel/condo

17% Other online travel agency

15% VRBO, HomeAway

13% Airbnb

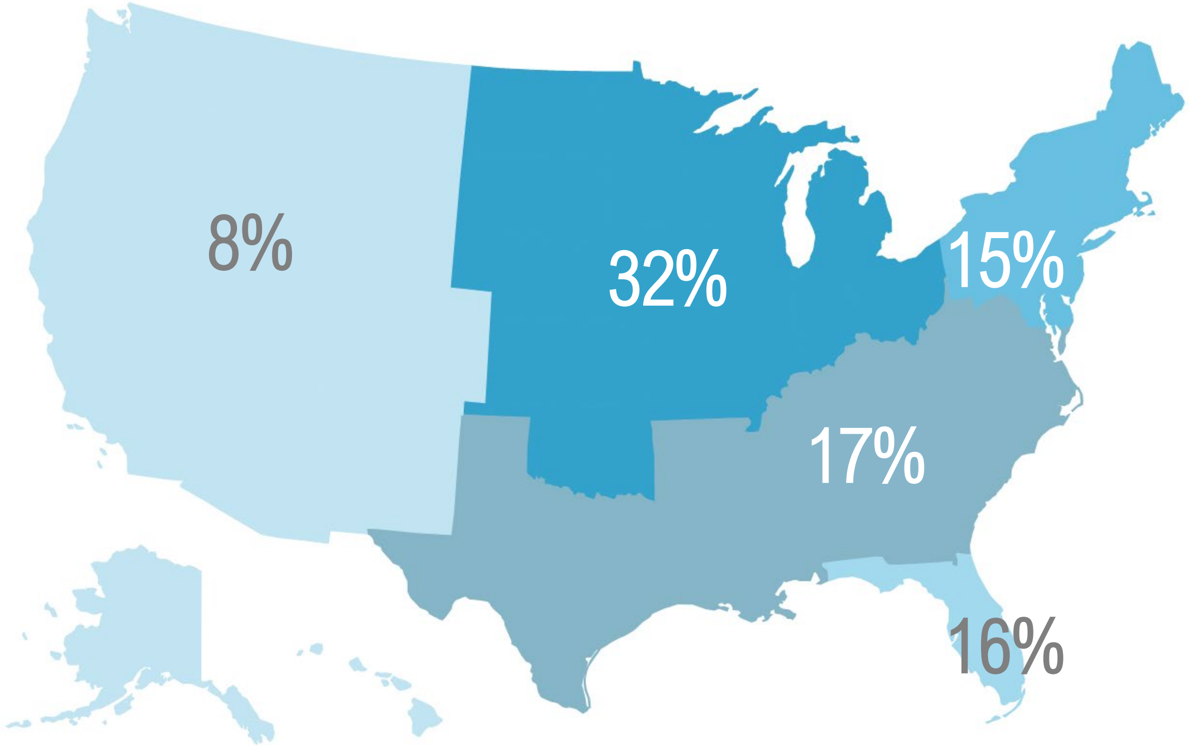
7% Vacation rental company

TRANSPORTATION

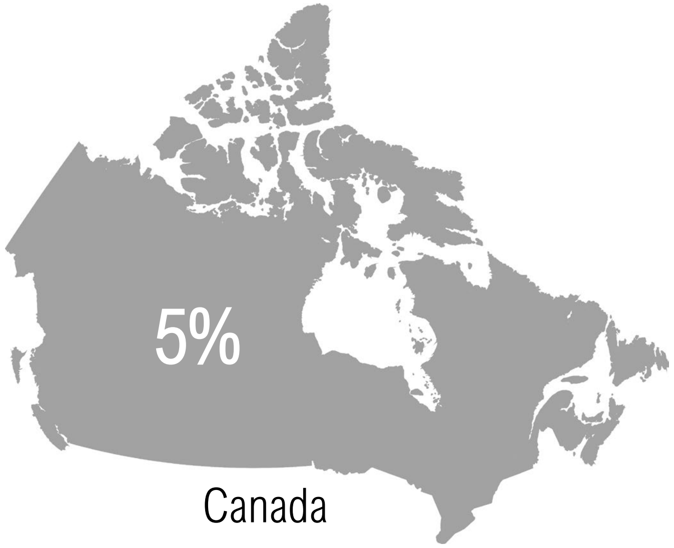
- 61% of visitors flew to the Fort Myers area
- 51% of all visitors traveled to the Fort Myers area via RSW

VISITOR JOURNEY: TRAVEL PARTY PROFILE

ORIGIN REGION[1]



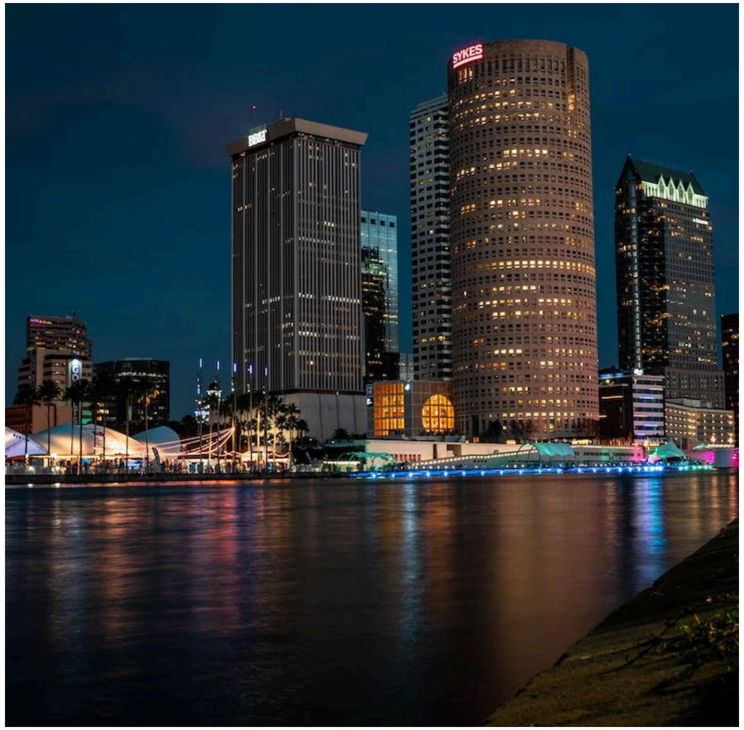
US = 88%



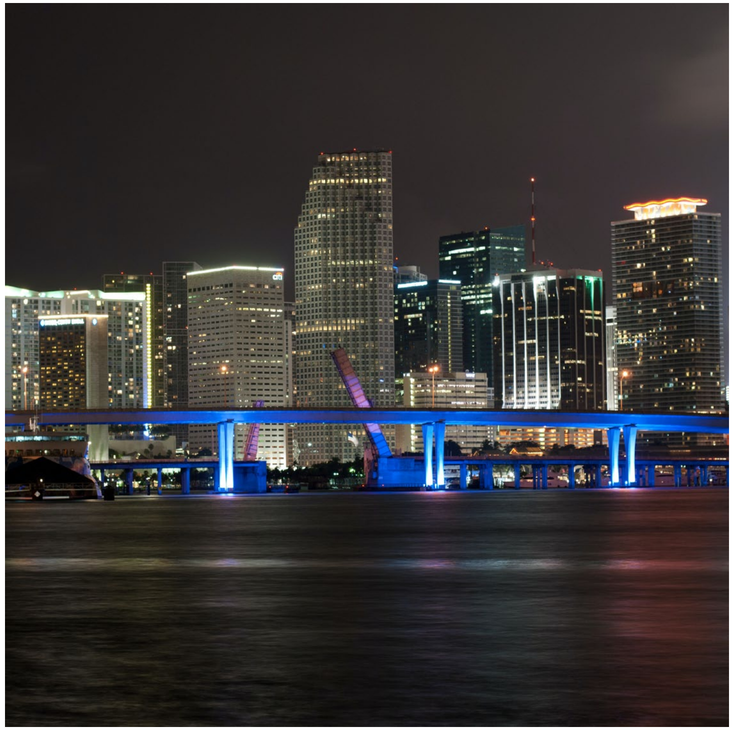
7% Other International Markets

[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% Tampa – St. Petersburg



4% Miami – Ft. Lauderdale

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 2.8 people[1]
- 31% traveled with children under the age of 18
- 1 in 3 traveled as a couple or as a family, while over 1 in 5 visitors traveled by themself

[1]Sources: Occupancy Study and Visitor Tracking Study

DEMOGRAPHIC PROFILE

October - December Visitors:

- Average age[1] of 51 years old
- Median household income of $108,800
- Married (72%)
- College educated (66%)
- Caucasian/white (71%)
- Male[1] (56%)

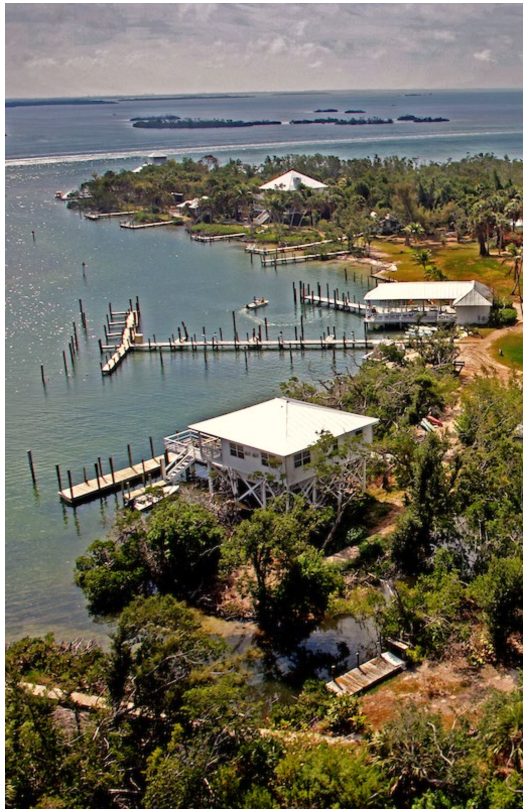
[1]Gender of person interviewed.

Visitor Journey: Trip Experience

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

TOP ACCOMMODATIONS

40% Hotel/Motel/Resort/B&B



38% Non-paid Accommodations

14% Condo/Vacation Rental

LENGTH OF STAY & NUMBER OF TIMES IN DESTINATION

- Visitors[1] spent an average of 7.8 nights in the Fort Myers area
- 26% were first time visitors
- 23% have visited more than 10 times

[1]Sources: Occupancy Study and Visitor Tracking Study

VISITOR ACTIVITIES

- Top visitor activities include[1]:

49% Shopping

69% Dining out

61% Relaxing & unwinding

49% Visiting friends/family

[1]Multiple responses permitted.

TOP ATTRACTIONS VISITED[1]

38% Miromar Outlets

32% Beaches

30% Gulf Coast Town Center

28% Bell Tower Shops

26% Coconut Point Mall

28% Edison & Ford Winter Estates

[1]Multiple responses permitted.

TOP COMMUNITIES STAYED

48% Fort Myers

13% Cape Coral

12% Bonita Springs

VISITOR JOURNEY: POST-TRIP EVALUATION

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

SATISFACTION

- 87% of visitors are likely to recommend the Fort Myers area
- 85% of visitors are likely to return
- 66% of visitors are likely to return next year

SATISFACTION

- 90% of visitors were satisfied or very satisfied with their overall visit to the Fort Myers area (48% were very satisfied)

- 88% of visitors were satisfied or very satisfied with customer service on their visit (48% were very satisfied)

- 36% of visitors said paid accommodations exceeded their expectations (97% met or exceeded expectations)

TOP ATTRIBUTE RATINGS

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

88% Peaceful/relaxing

87% Warm weather

86% A safe destination

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

VISITOR CONCERNS[1]

- Nearly 2 in 5 visitors were concerned about traffic in the Fort Myers area
- Over 1 in 7 were concerned about high prices
- Nearly 1 in 4 visitors had no concerns at all about the destination

[1]6% of visitors specifically mentioned concerns regarding the impact of Hurricane Ian.

AREA DESCRIPTIONS

Peaceful/relaxing

"It's really a wonderful place. It's quaint and peaceful. It's my favorite place in the world to relax and watch the sunset."

Warm Weather

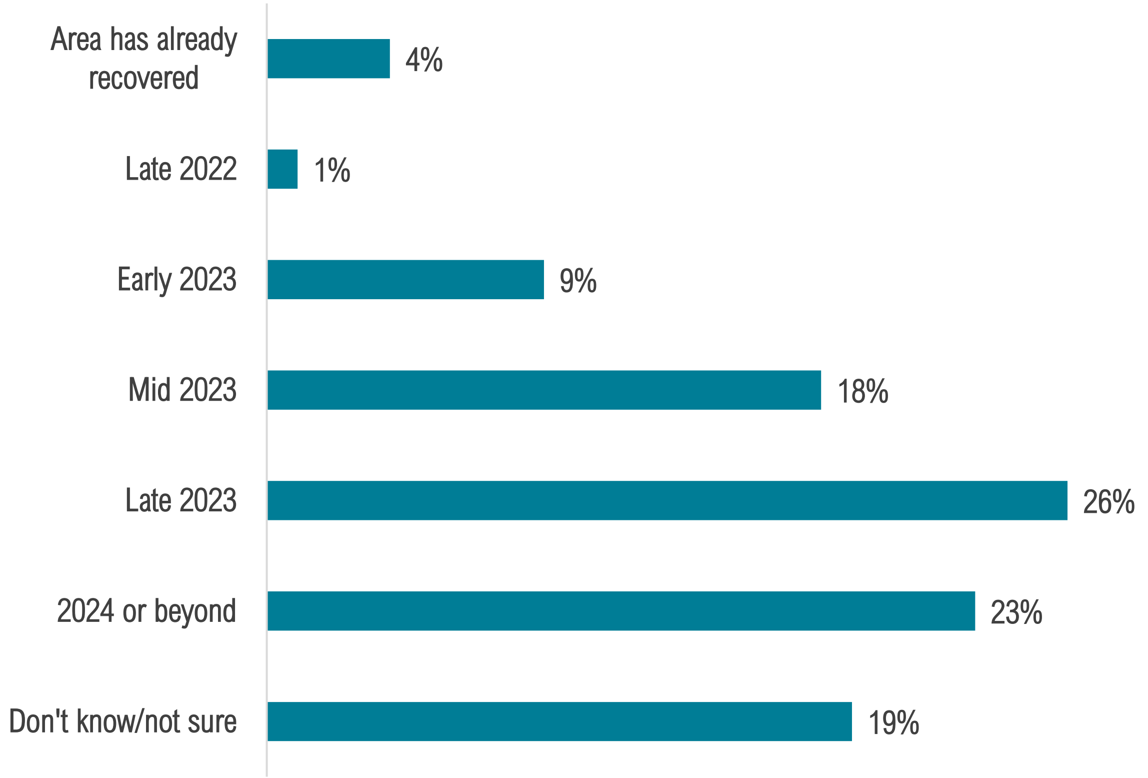
"Despite having no access to the beaches when we visited, we still had a tremendous vacation because of the great weather and plentiful restaurant and shopping options. It's really an amazing area."

Safe Destination

"I had a great time here on vacation with my family. Despite the events of Hurricane Ian, it's still a wonderful place to visit! It's a very welcoming area."

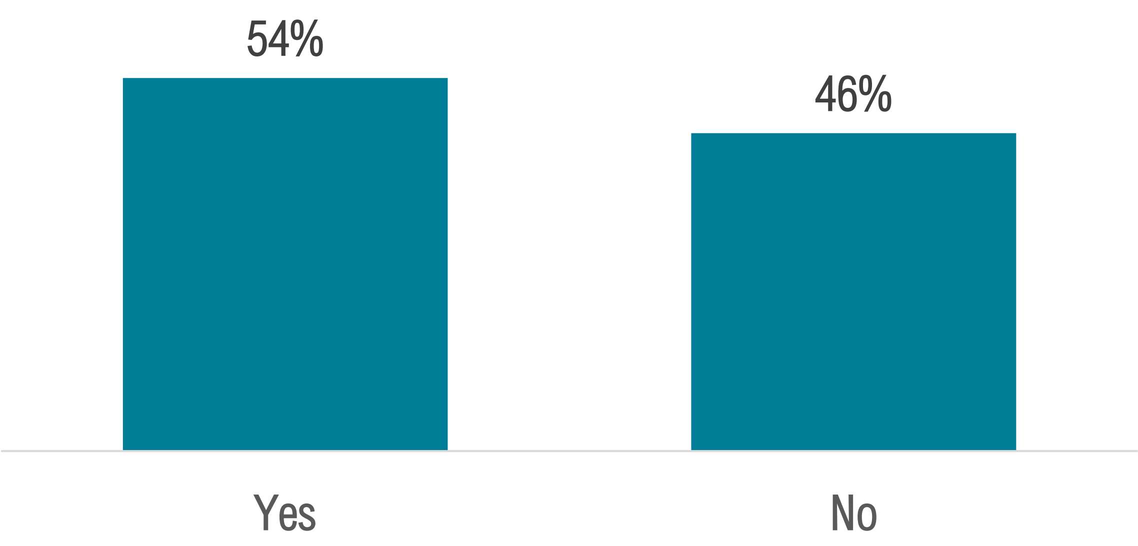
VISITOR HURRICANE RECOVERY FORECAST

"When do you think the Fort Myers area will recover enough to make a trip to the area feel back to normal?"

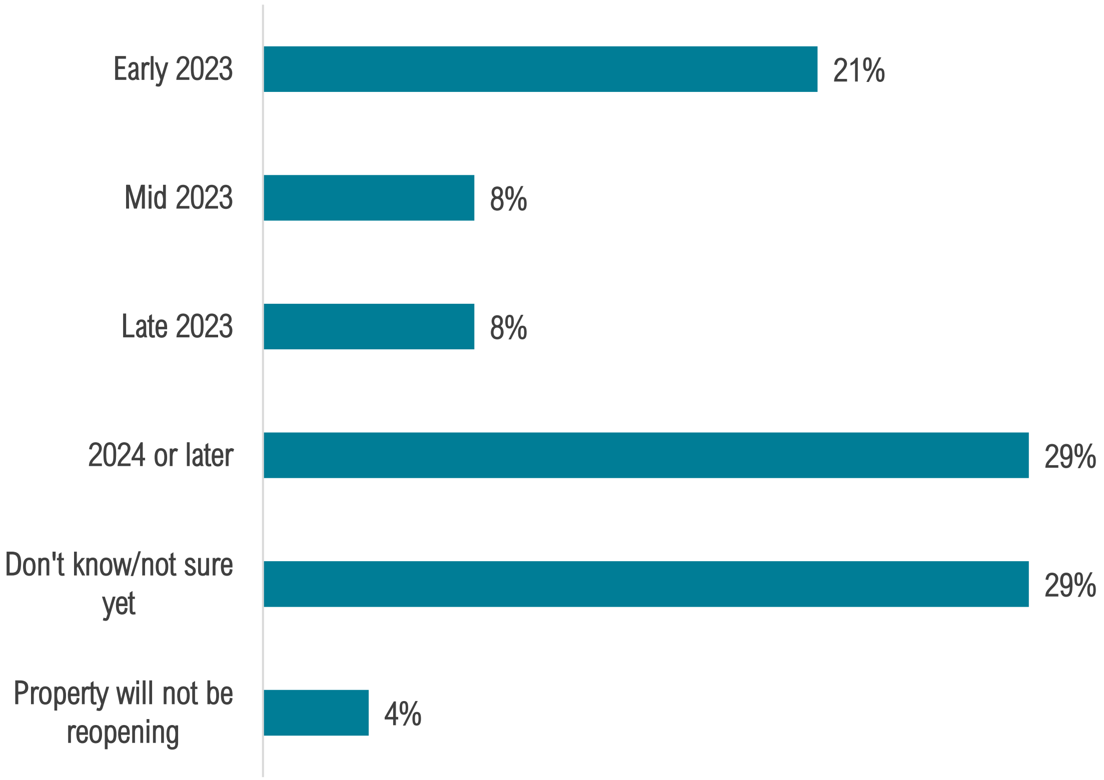


OCCUPANCY BAROMETER: PROPERTY RECOVERY

“Is your property currently open to guests?”

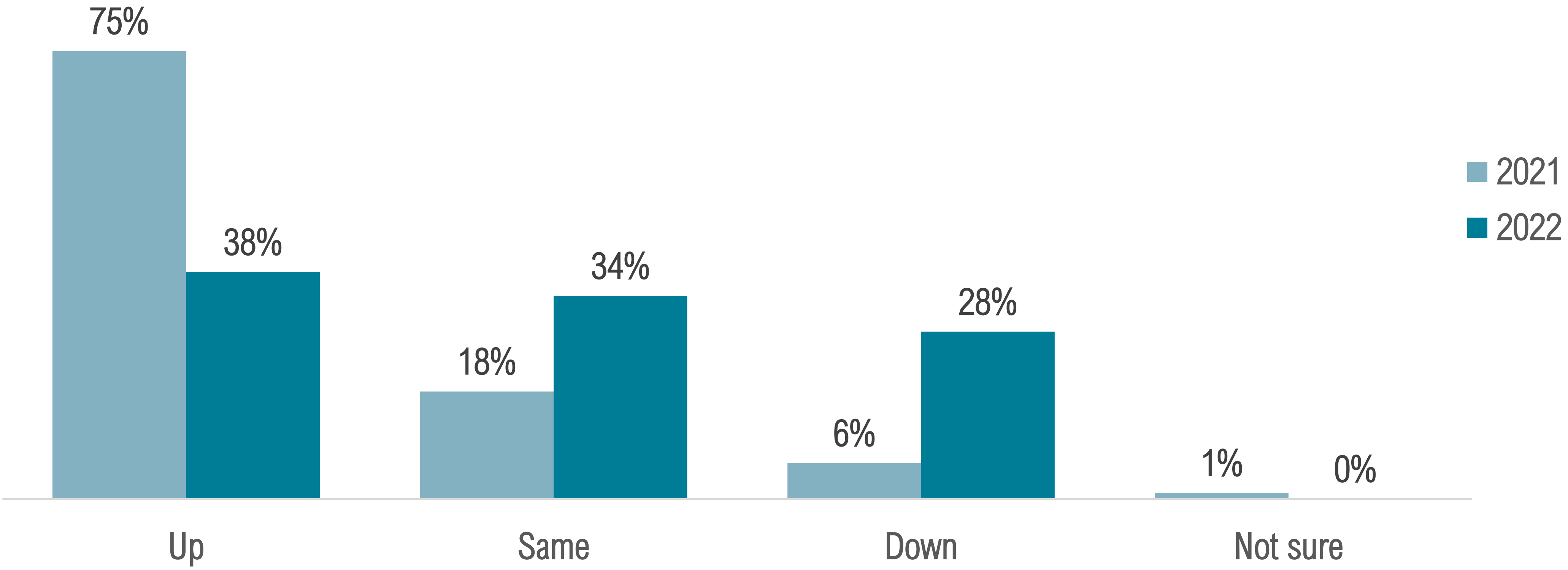


“When do you think your property will re-open to guests?”



[1]Sources: Occupancy Survey

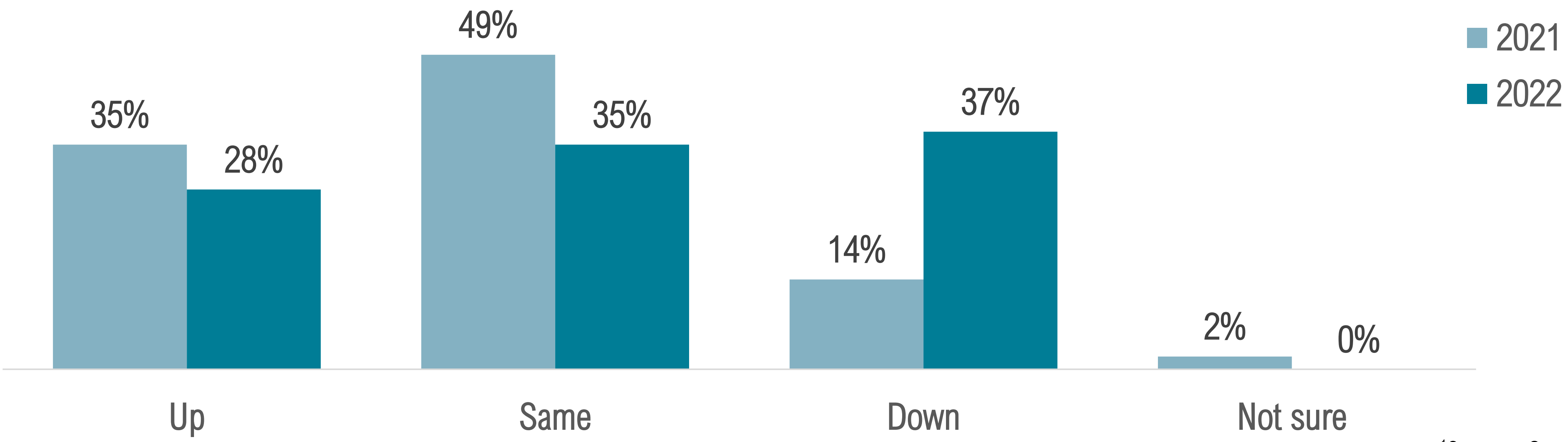
OCCUPANCY BAROMETER[1]: JAN – MAR RESERVATIONS



[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?"

OCCUPANCY BAROMETER[1]: APR – JUN RESERVATIONS



[1]Sources: Occupancy Survey

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

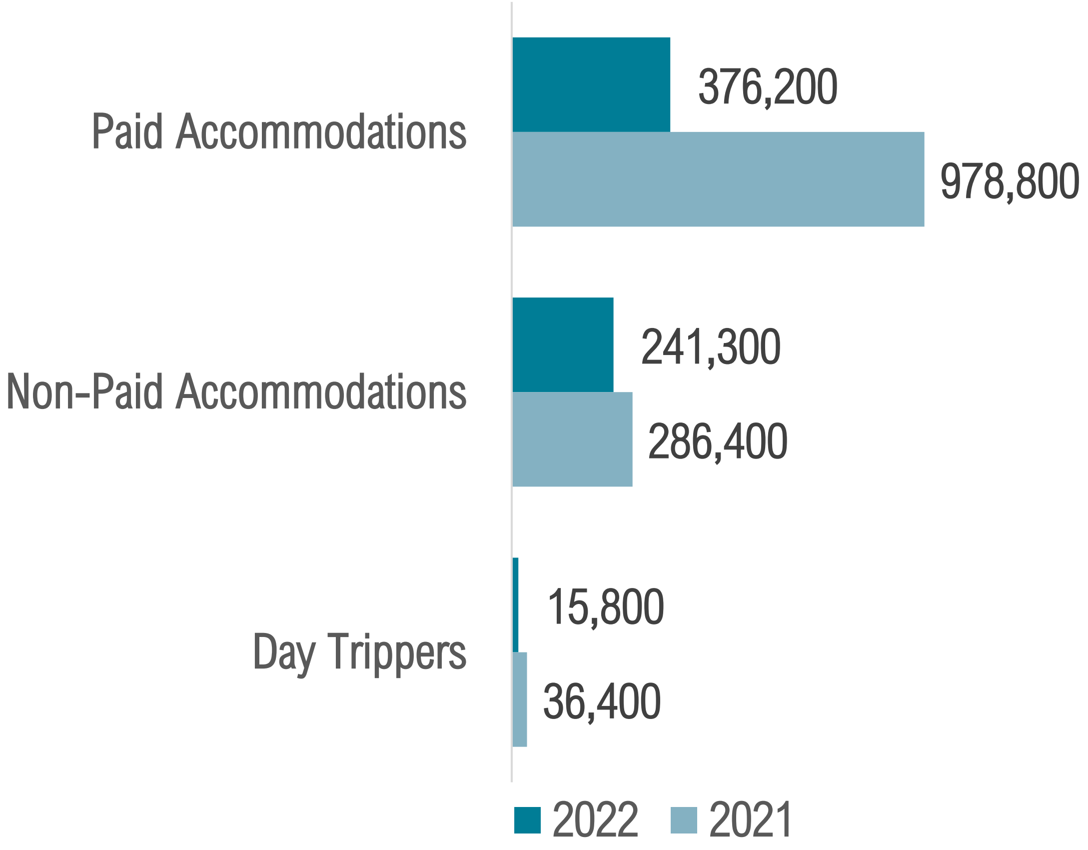
Detailed Findings

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

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

NUMBER OF VISITORS

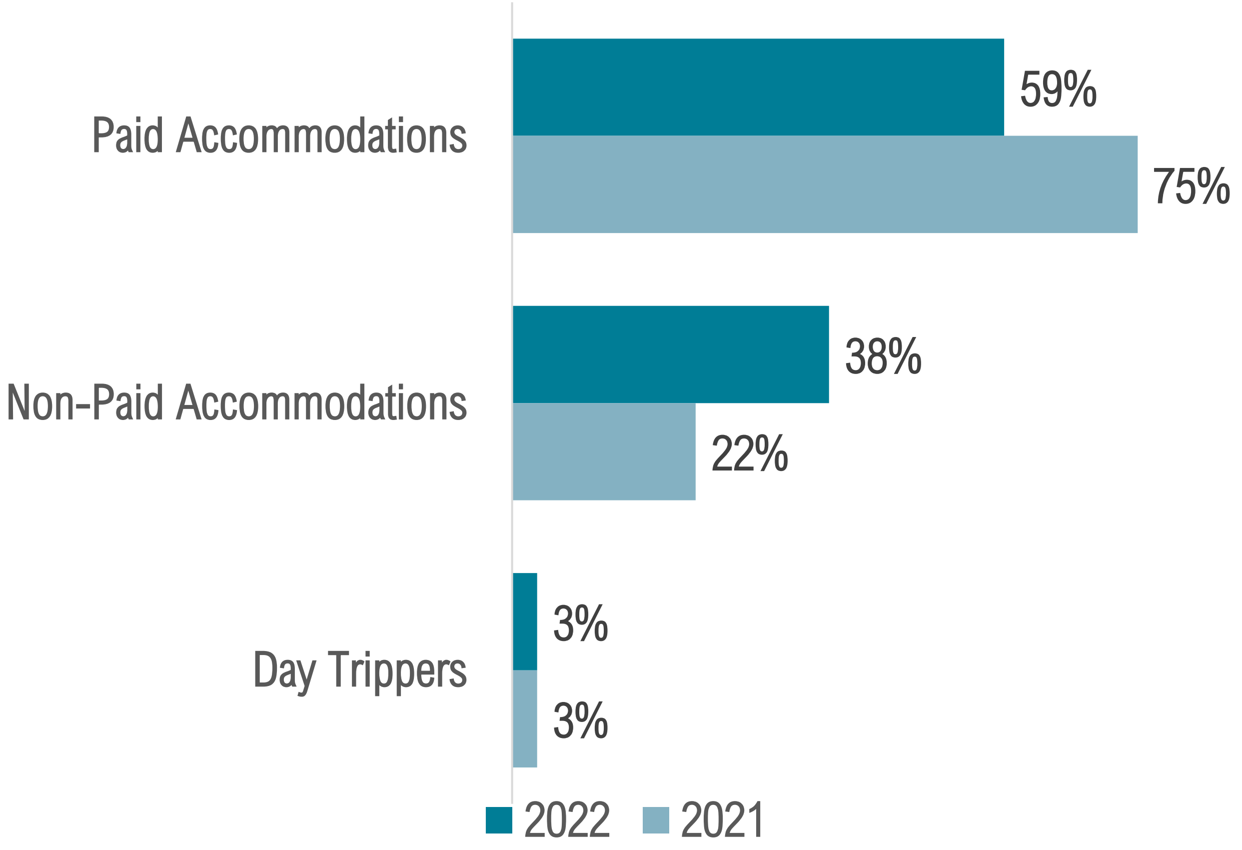
There were 633,300[1] visitors to the Fort Myers area in October - December 2022 (-51.3% from 2021).



[1]Sources: Visitor Tracking Study & Occupancy Survey

VISITOR TYPE

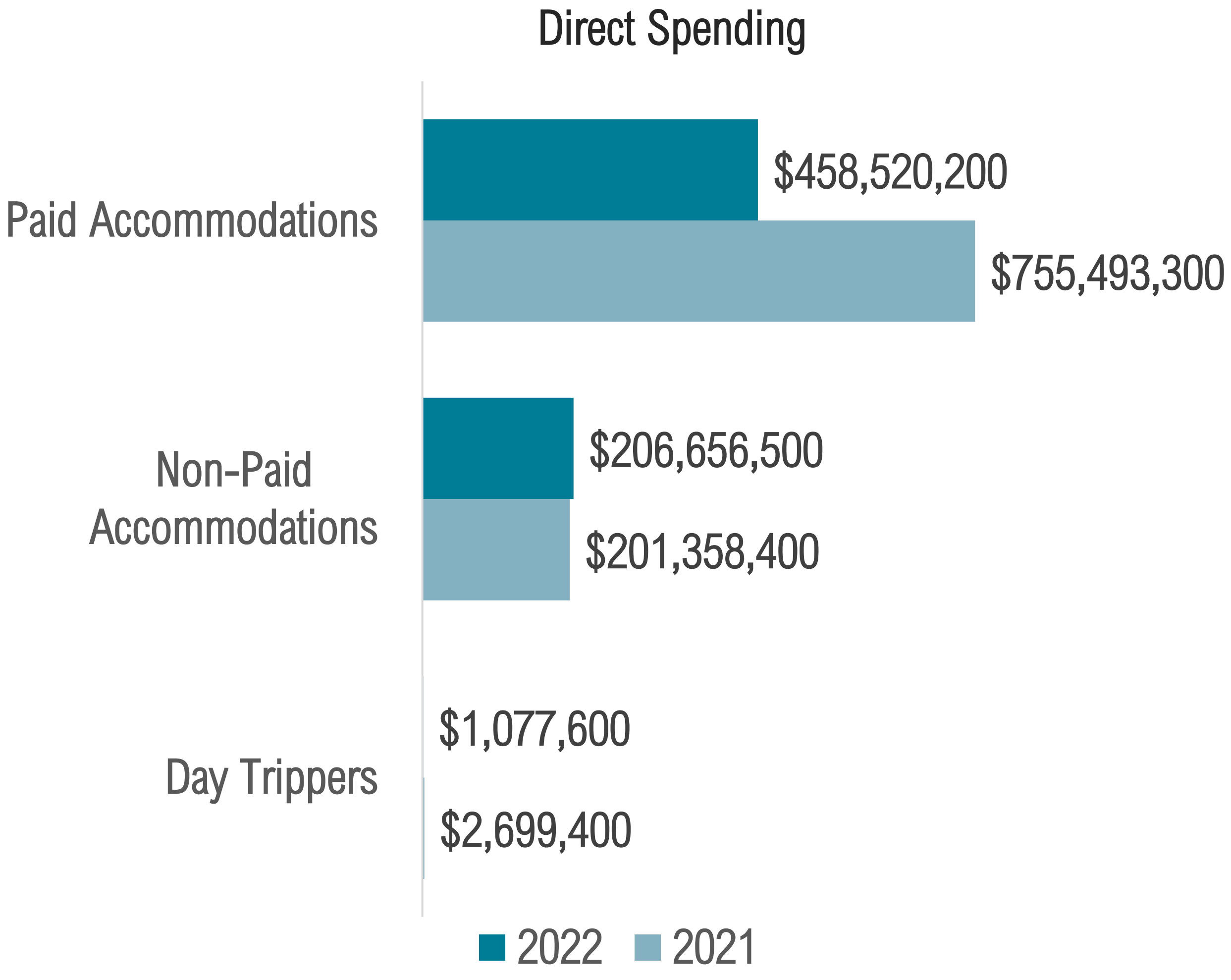
Visitors staying in paid accommodations accounted for just under **3 in 5** visitors.



VISITOR EXPENDITURES BY VISITOR TYPE

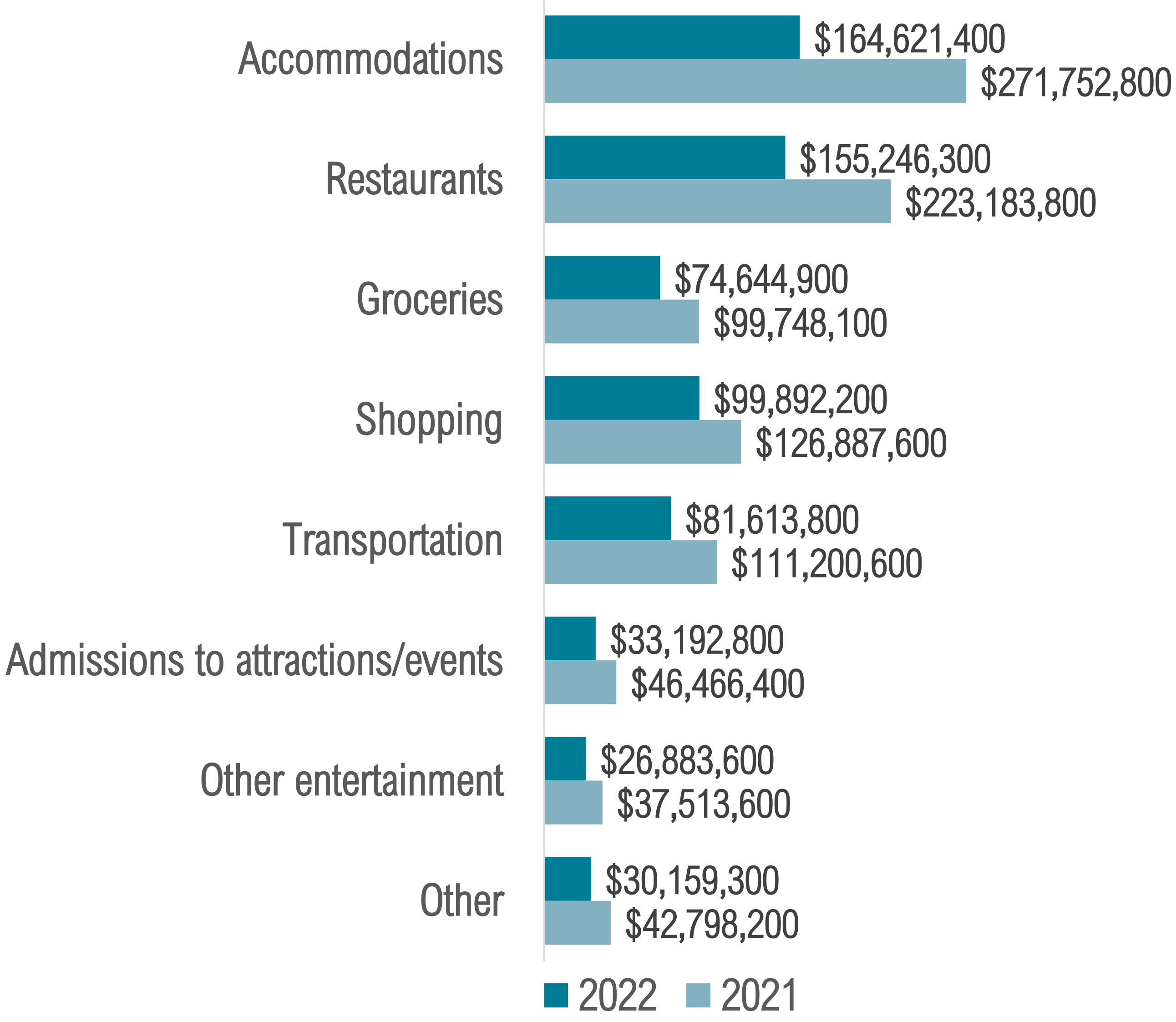
October - December visitors spent $666,254,300 in the Fort Myers area, resulting in a total economic impact of $1,061,343,100, down 30.6% from 2021.

Visitors staying in paid accommodations accounted for 59% of all visitors and 69% of all spending.



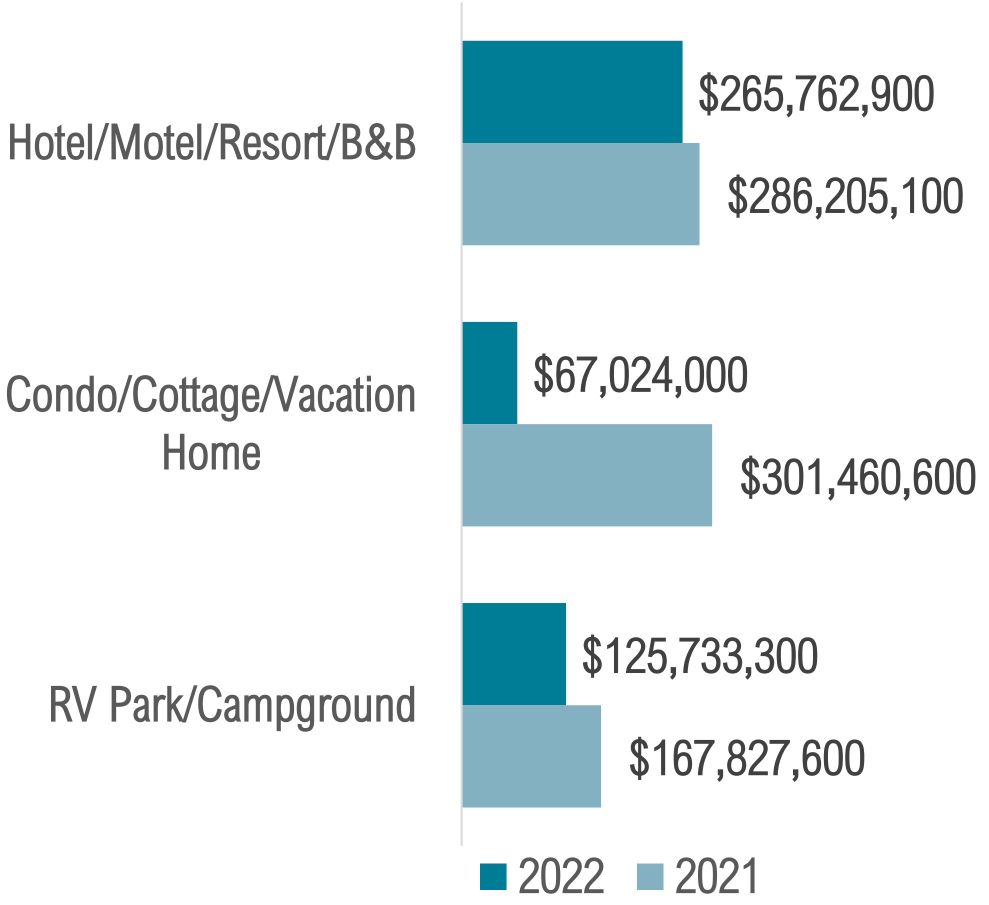
VISITOR EXPENDITURES BY SPENDING CATEGORY

Of the $666,254,300 visitors spent in the Fort Myers area, 25% was spent on accommodations and 23% was spent on restaurants, accounting for 48% of all visitor spending.



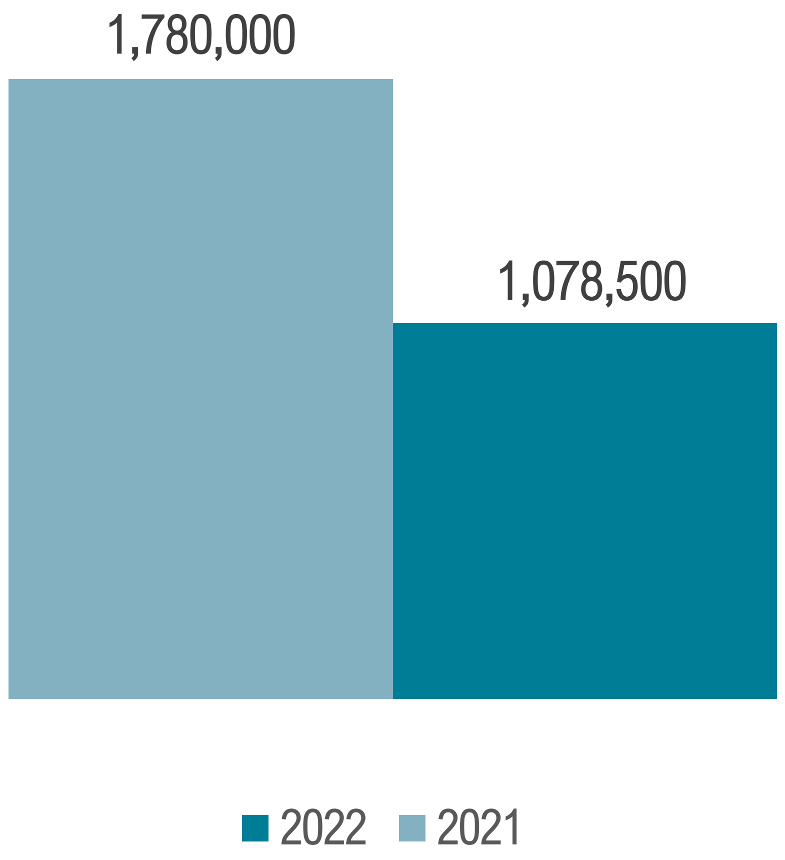
VISITOR EXPENDITURES BY LODGING TYPE

October - December visitors staying in paid accommodations spent $458,520,200 in the Fort Myers area.



ROOM NIGHTS GENERATED

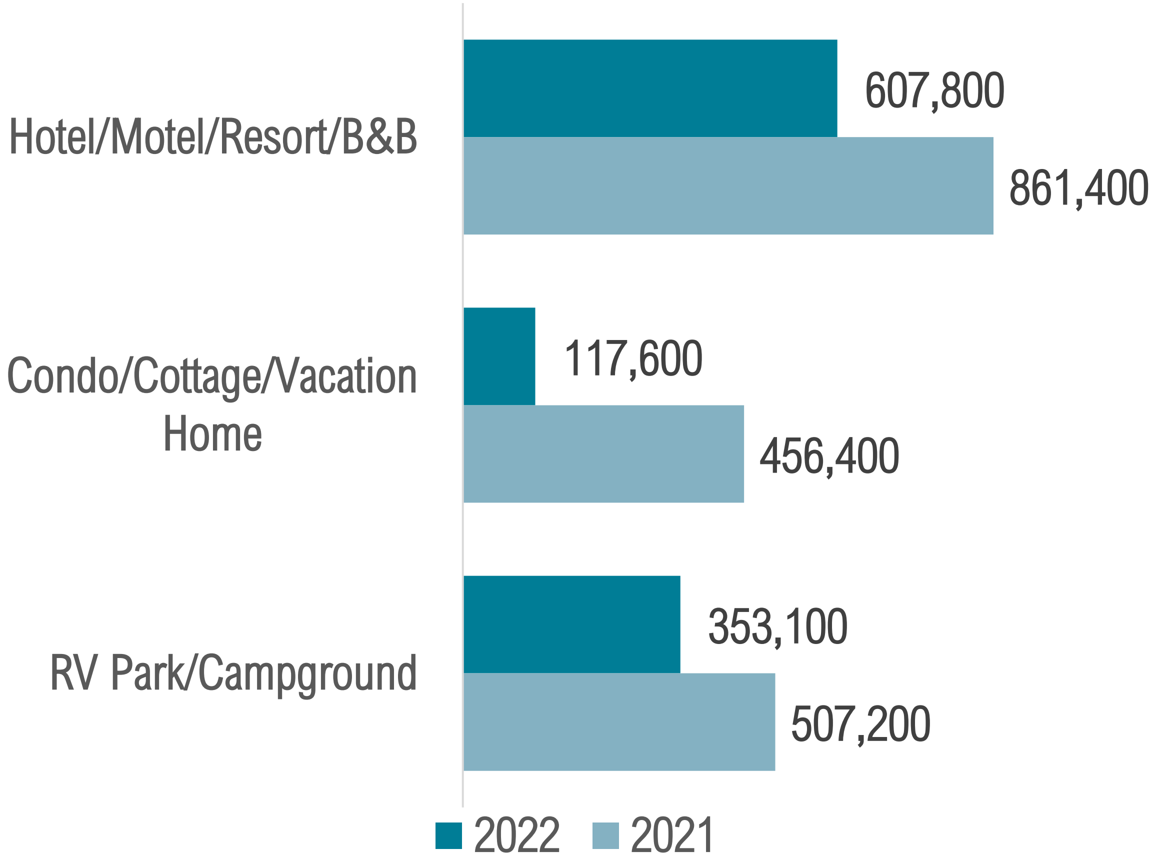
October - December visitors spent **1,078,500**[1] nights in Fort Myers area hotels, resorts, condos, rental houses, etc. (-39.4% from 2021).



[1]Source: Occupancy Study, STR, and KeyData

ROOM NIGHTS GENERATED

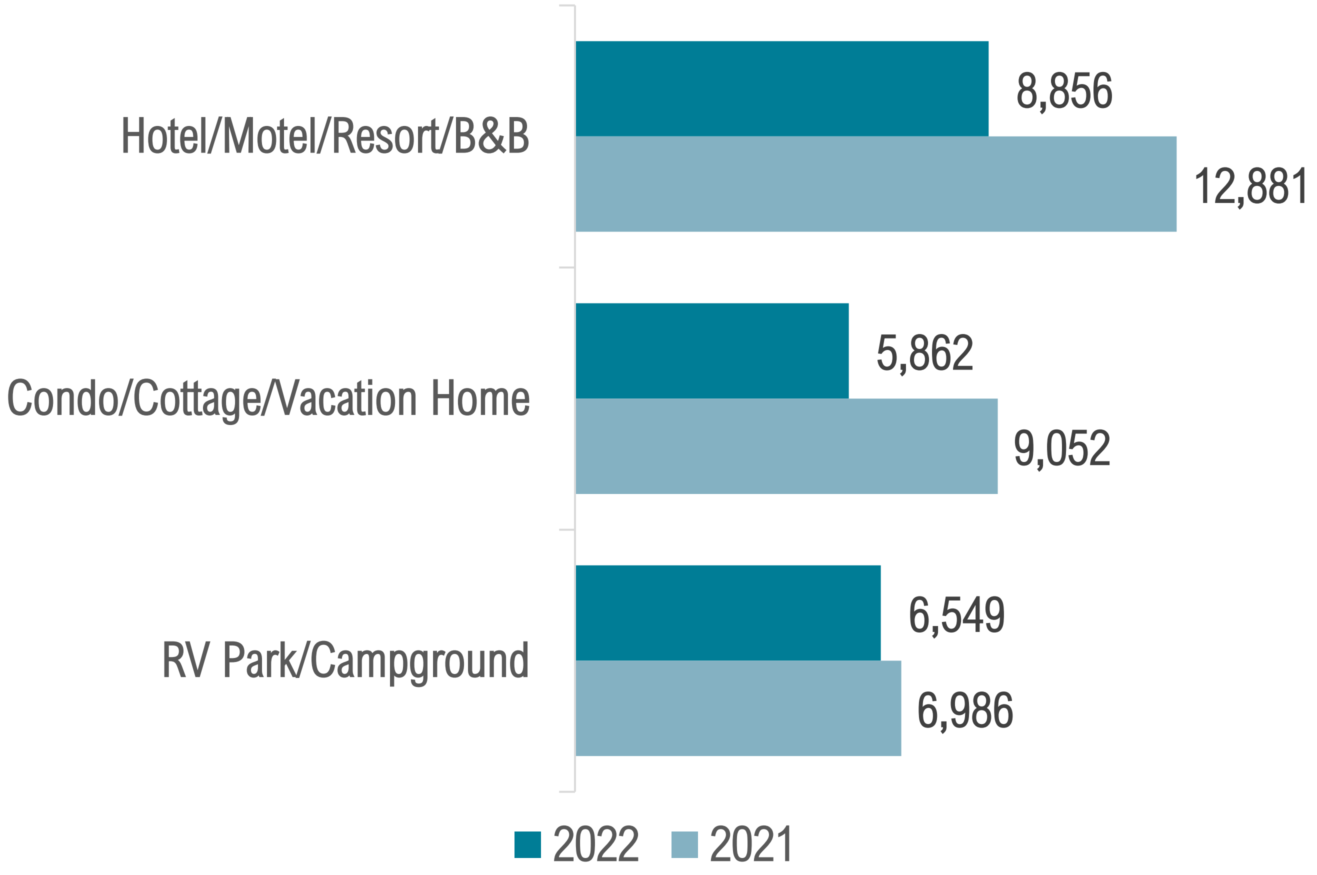
Hotels, motels, etc. accounted for over **half** the nights spent in the Fort Myers area, while vacation rentals accounted for only **1 in 10** nights visitors spent in the area.



[1]Source: Occupancy Study, STR, and KeyData

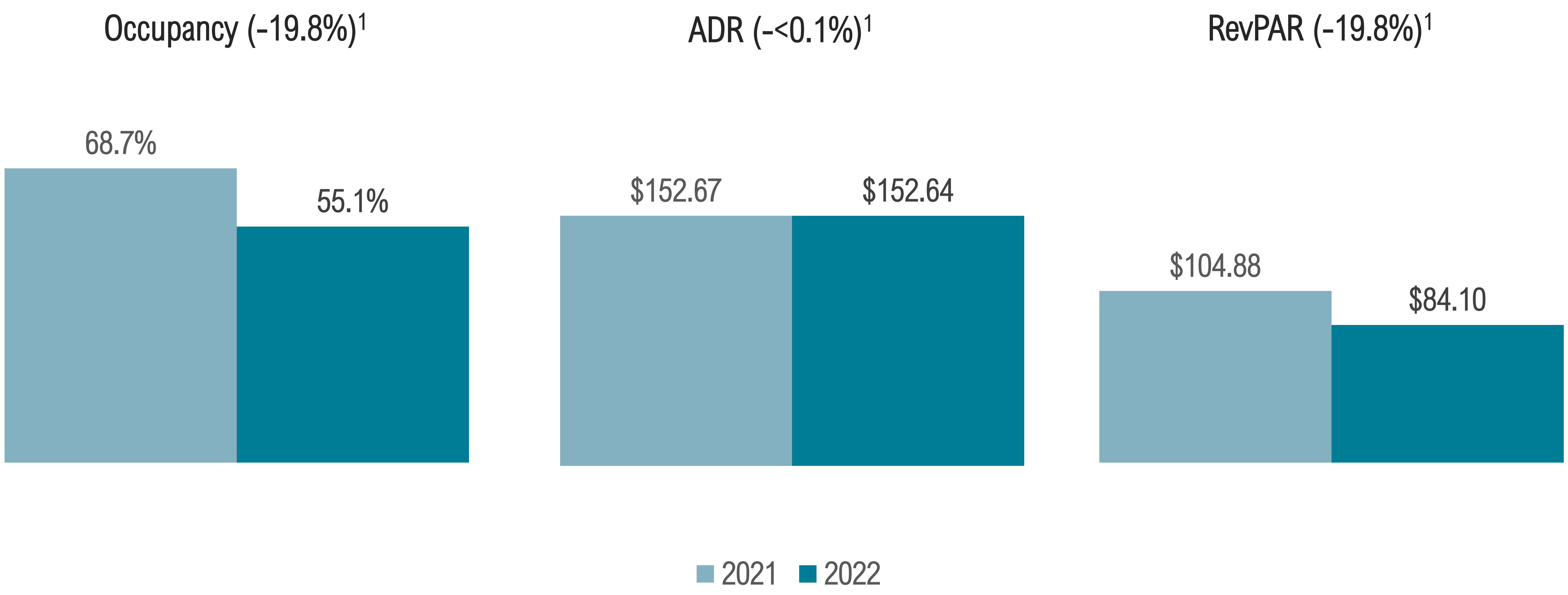
AVAILABLE UNITS

There were 21,267[1] available units in October - December 2022 vs. 28,919 in 2021(-26%). Over 2 in 5 of the units available were from hotels, motels, etc.



[1]Source: Occupancy Study, STR, and KeyData

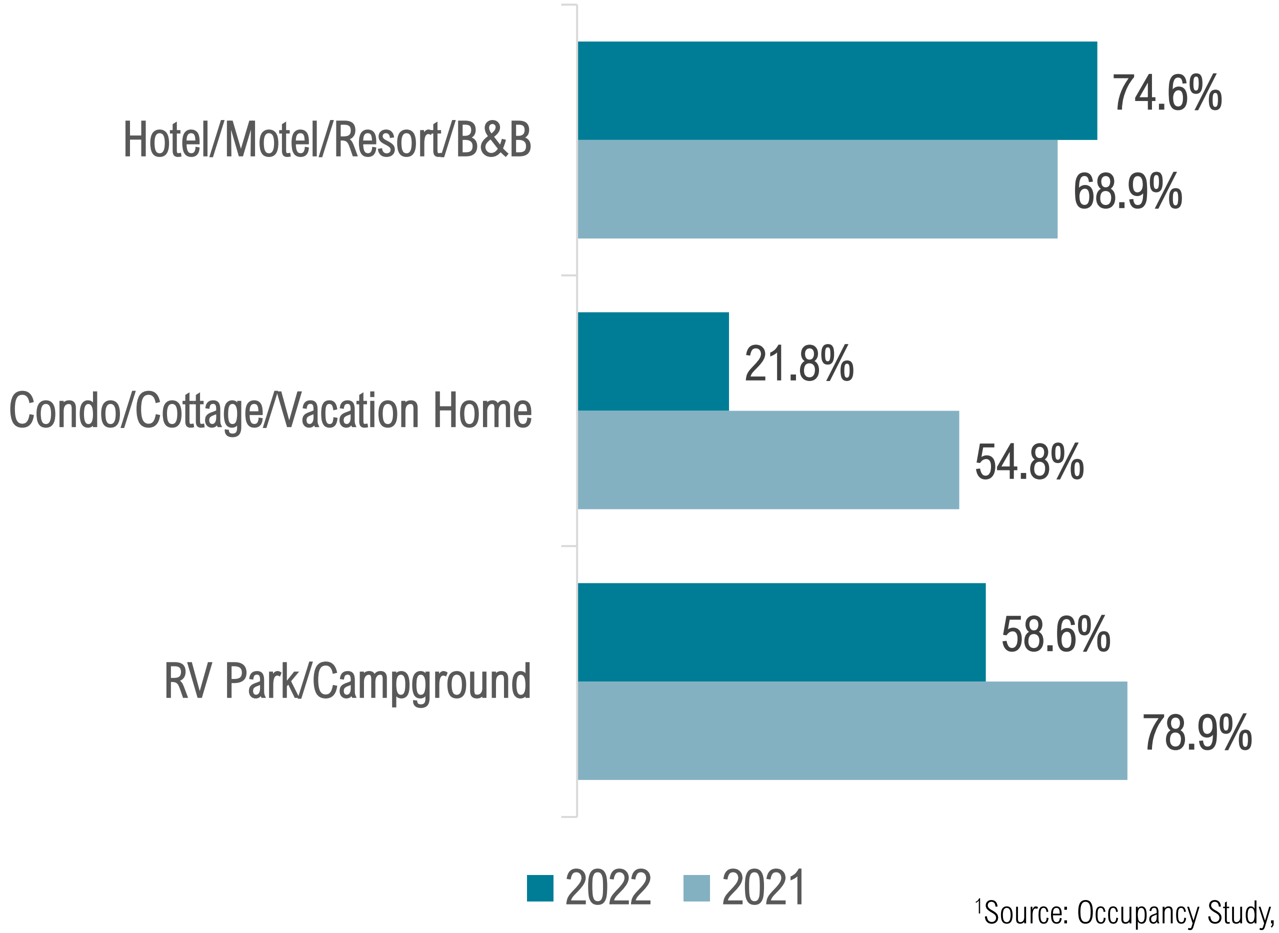
OCCUPANCY, ADR AND REVPAR



[1]Source: Occupancy Study, STR, and KeyData

OCCUPANCY

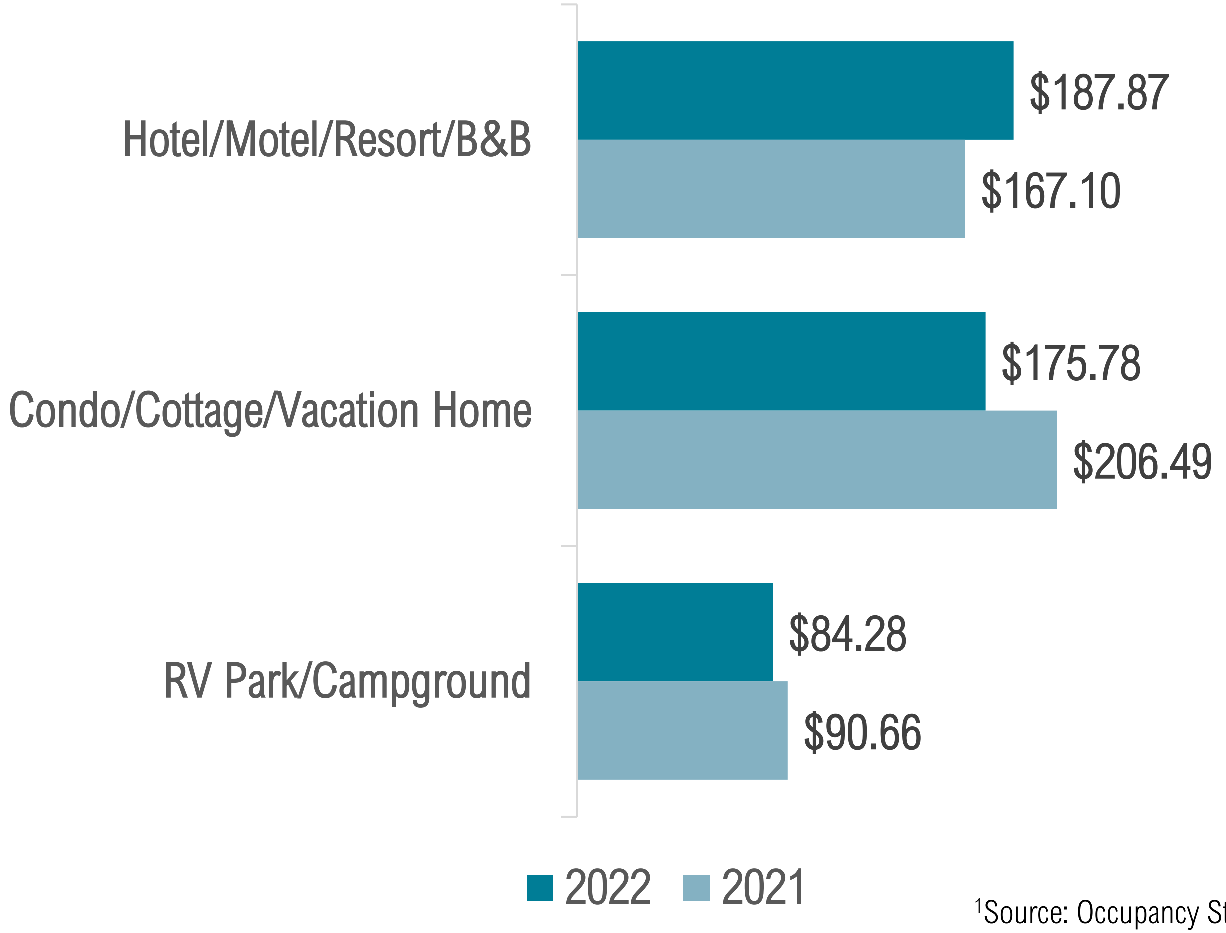
Average occupancy in October – December was 55.1%[1] (68.7% in 2021).



[1]Source: Occupancy Study, STR, and KeyData

ADR

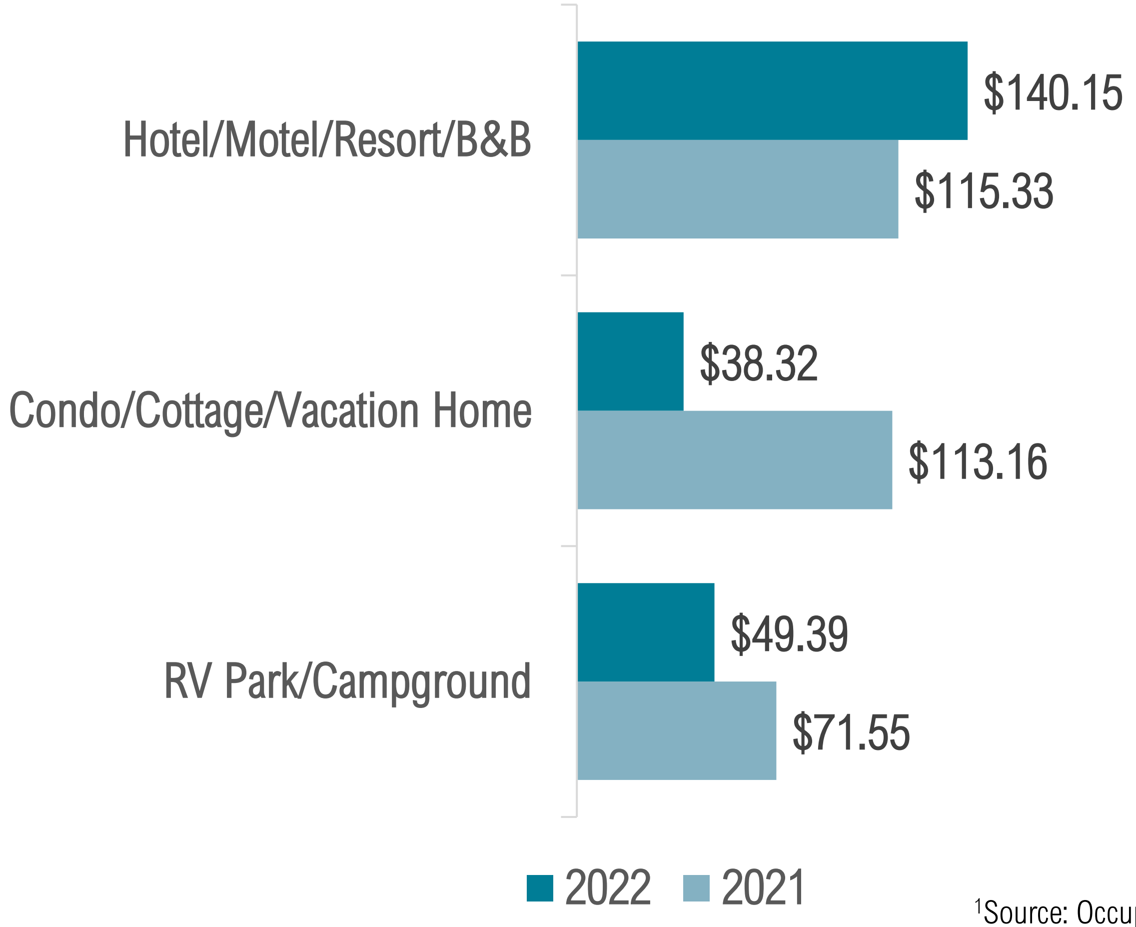
ADR in October - December was $152.64[1] ($152.67 in 2021).



[1]Source: Occupancy Study, STR, and KeyData

REVPAR

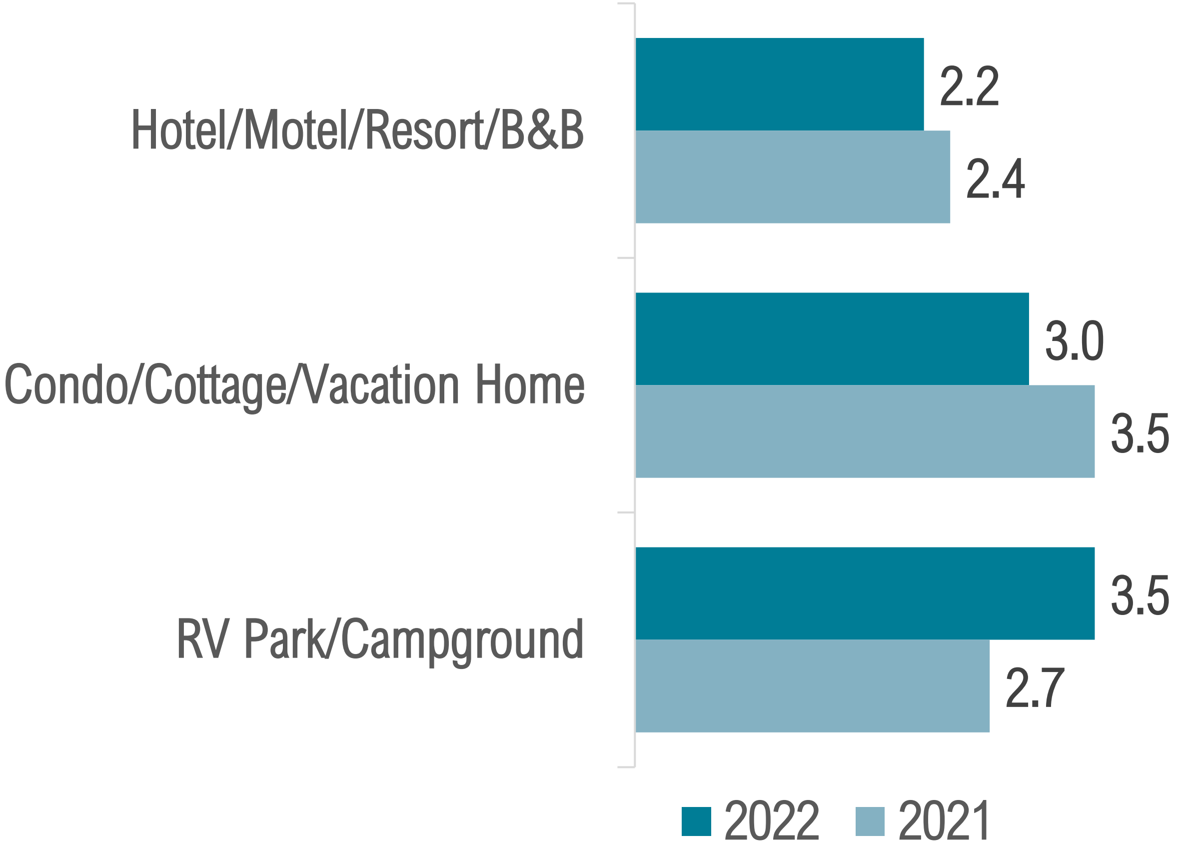
Average RevPAR in October - December was $84.10[1] ($104.88 in 2021).



[1]Source: Occupancy Study, STR, and KeyData

TRAVEL PARTY SIZE

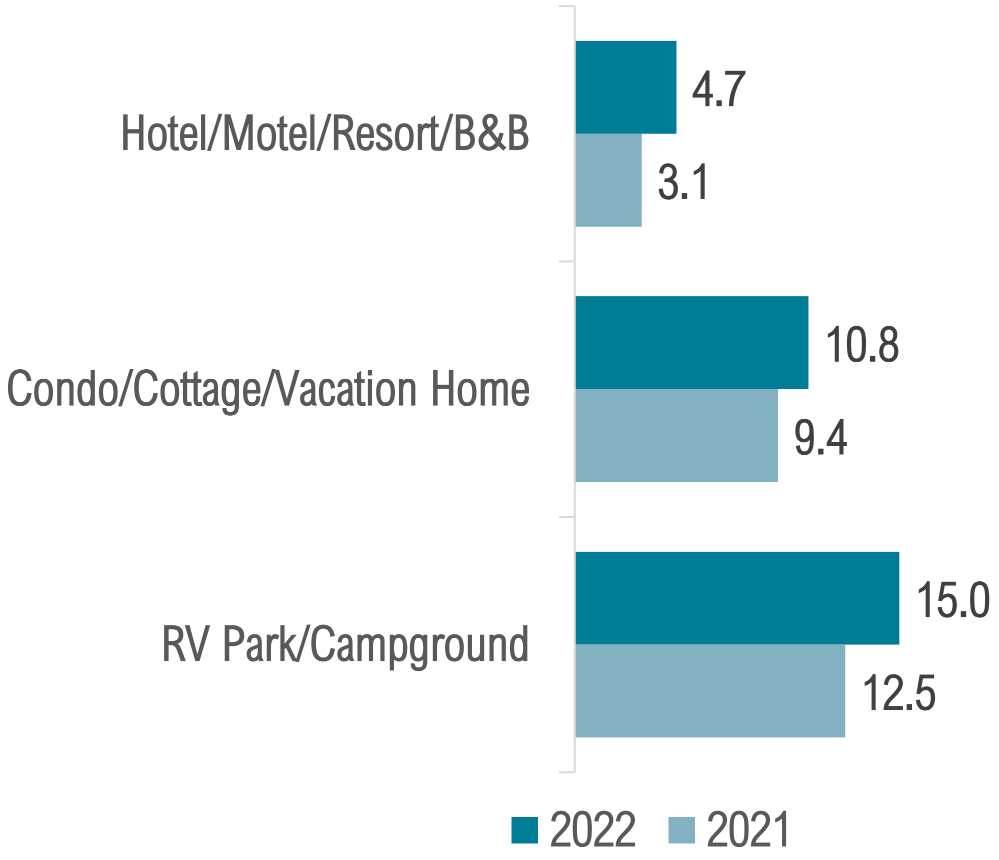
For visitors in paid accommodations, average travel party size in October - December was **2.6 people**[1] (3.0 people in 2021).



[1]Source: Occupancy Study, STR, and KeyData

LENGTH OF STAY

For visitors in paid accommodations, average length of stay in October - December was **7.4 nights**[1] (5.4 nights in 2021).



[1]Source: Occupancy Study, STR, and KeyData

Visitor Journey: Pre-Visit

Pre-Visit

Travel Party Profile

Trip Experience

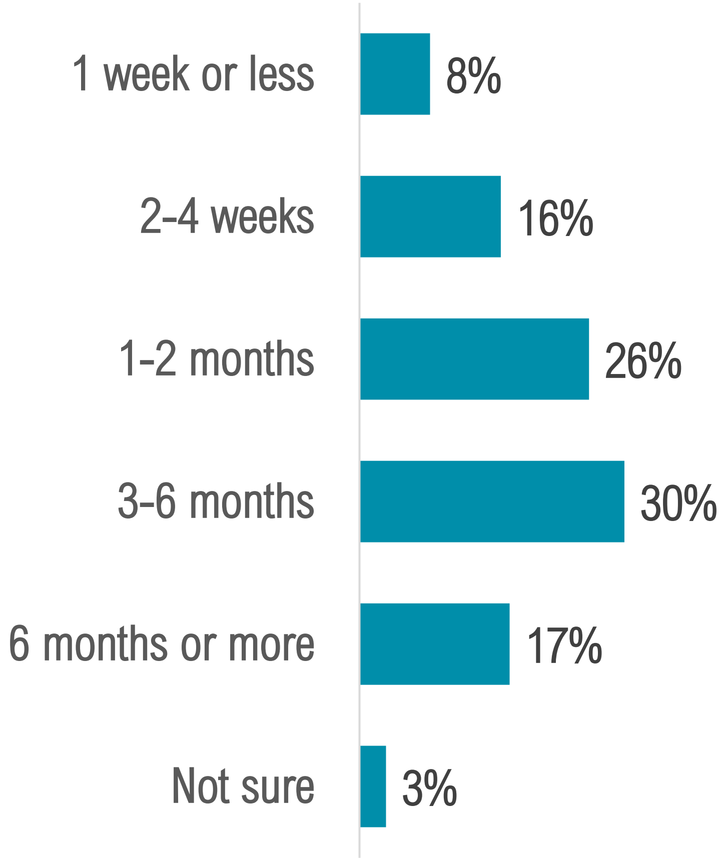
Post-Trip Evaluation

Economic Impact on Destination

TRIP PLANNING CYCLE

Nearly 1 in 3 visitors planned their trip 3-6 months in advance, while over 1 in 4 visitors planned their trip 1-2 months in advance.

The average trip planning cycle lasted nearly 3 months (87 days).

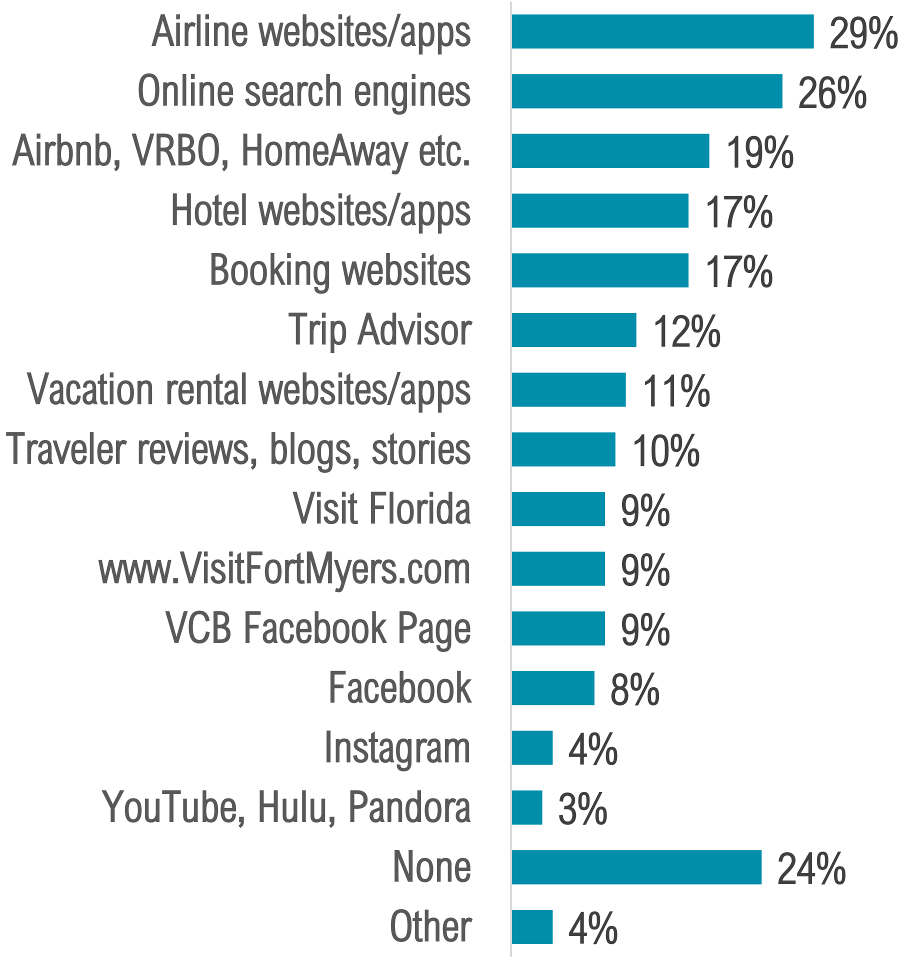


TRIP PLANNING: WEBSITES/APPS USED[1]

Over **3 in 4** visitors used **websites and apps** to plan their trip to the Fort Myers area.

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

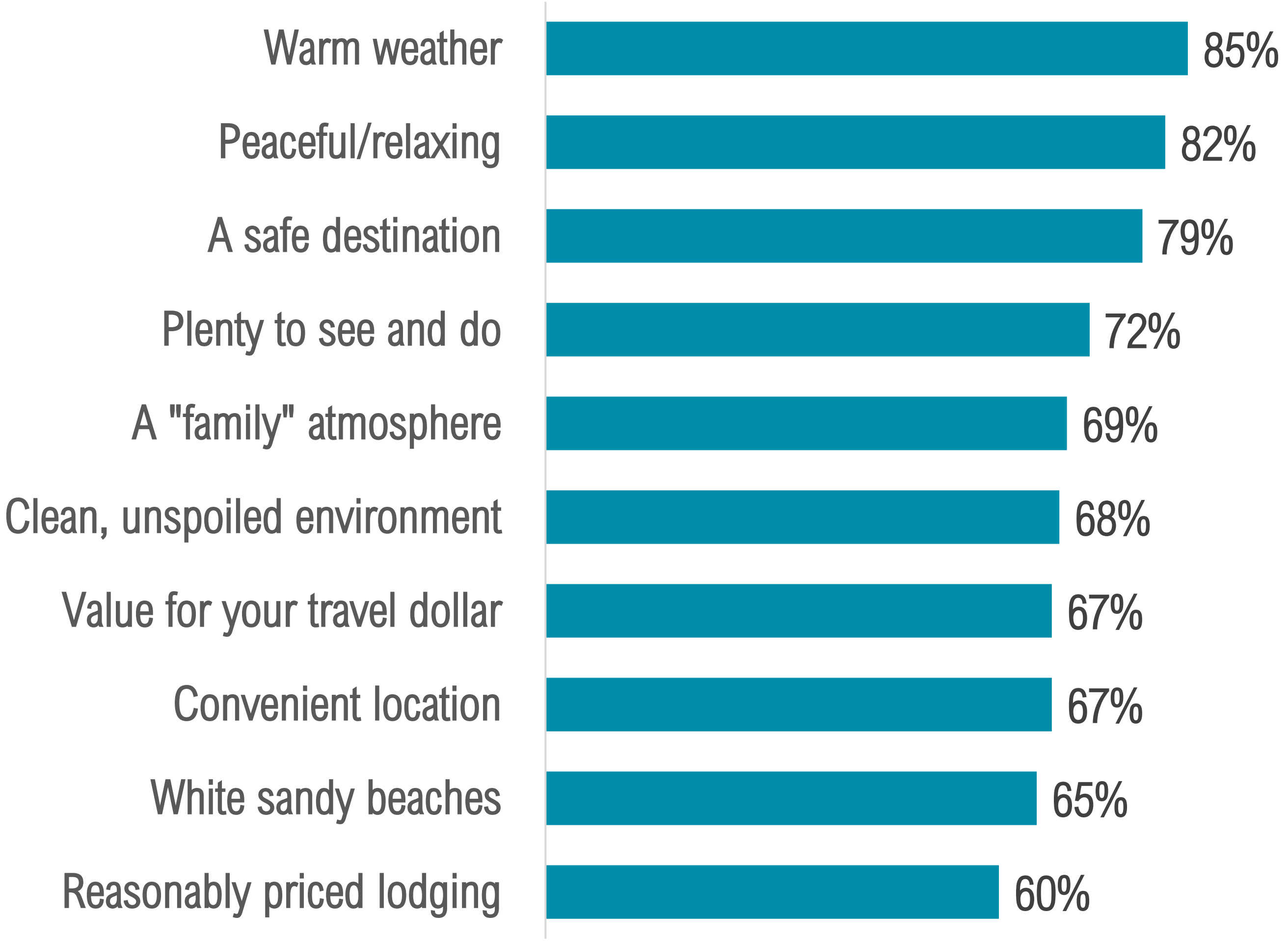
Nearly **1 in 5** visitors used **Airbnb, VRBO, HomeAway, or similar websites** to plan their trips.



[1]Multiple responses permitted.

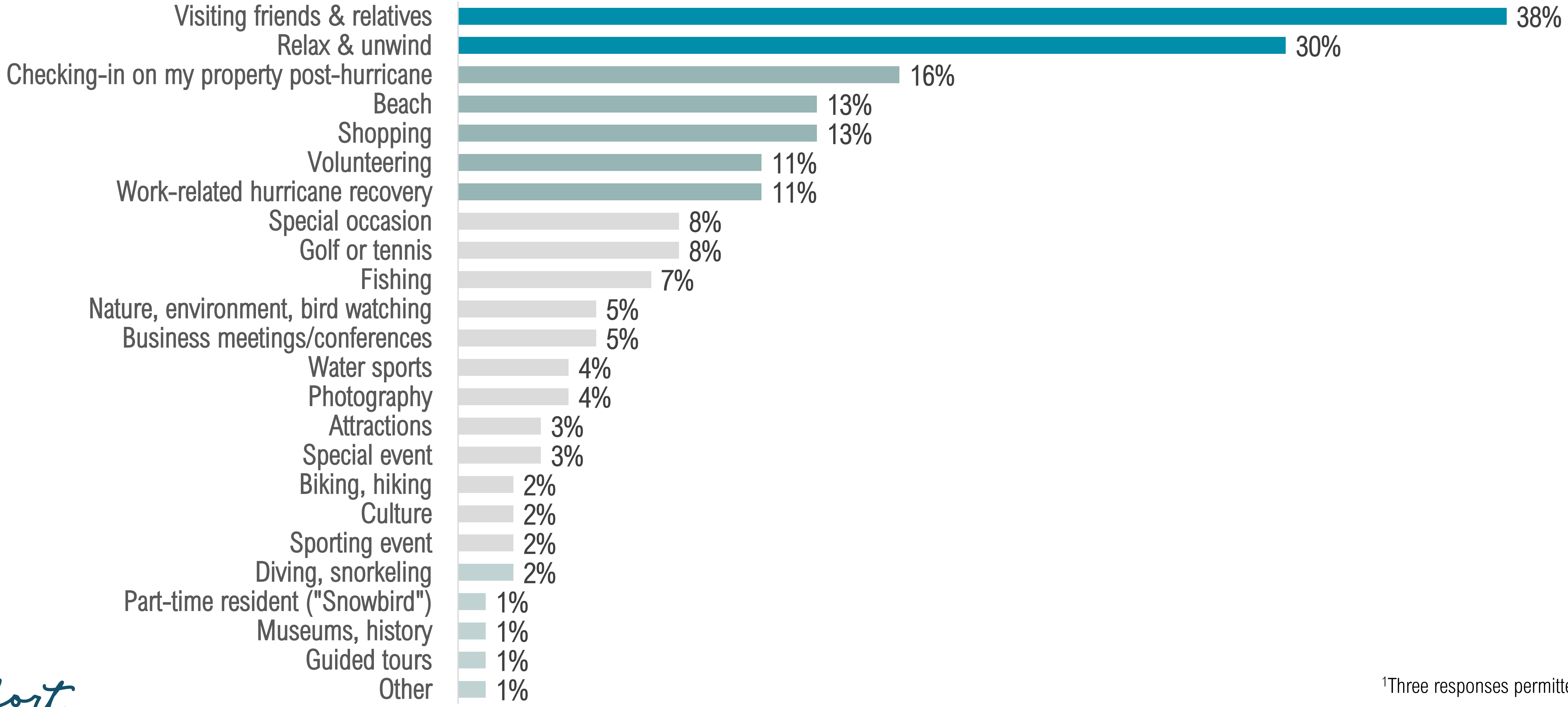
TRIP INFLUENCERS[1]

Over 4 in 5 visitors were heavily influenced by the warm weather and peaceful/relaxing atmosphere in the Fort Myers area 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.

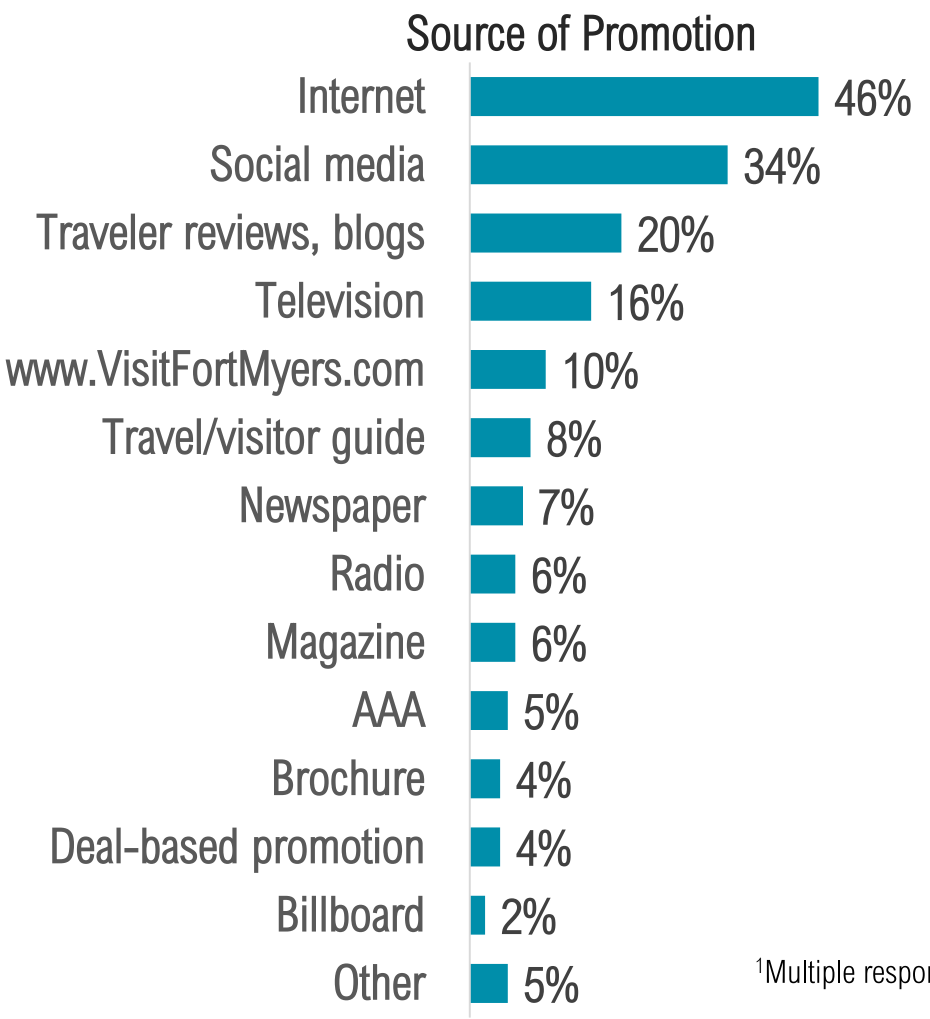
Pre-Visit
Oct - Dec 2022

PROMOTIONS[1]

BASE: 40% of visitors who recalled promotions

40% of visitors recalled promotions in the past 6 months for the Fort Myers area.

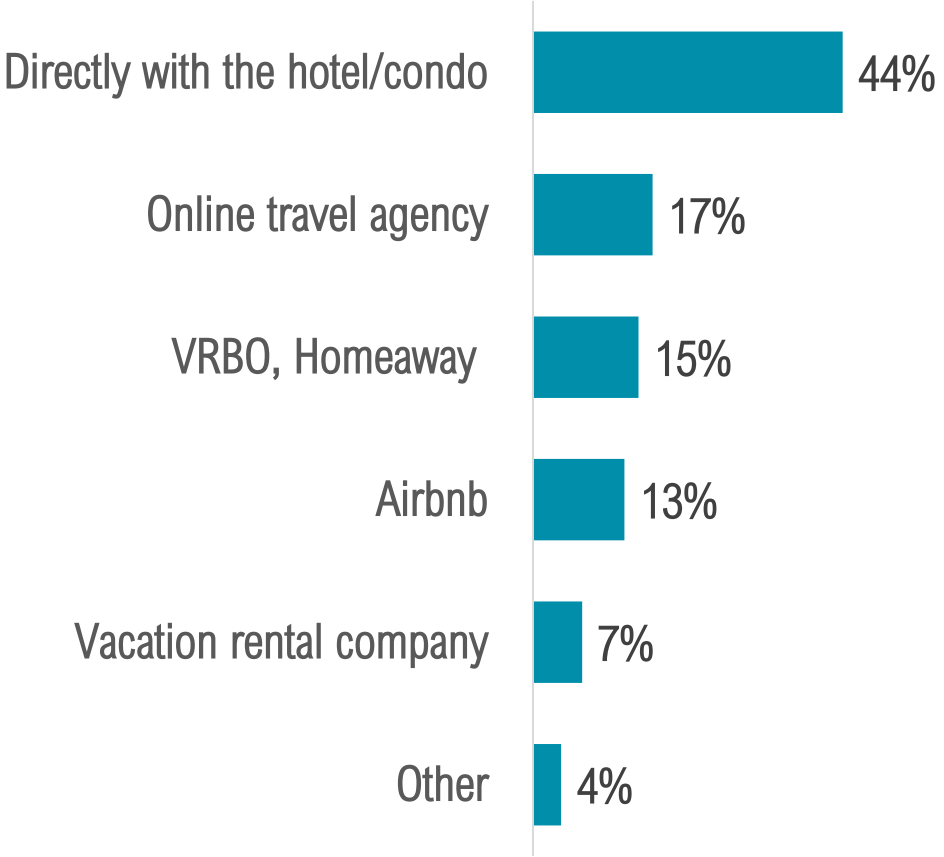
This influenced 21% of all visitors to come to the Fort Myers area.



[1]Multiple responses permitted.

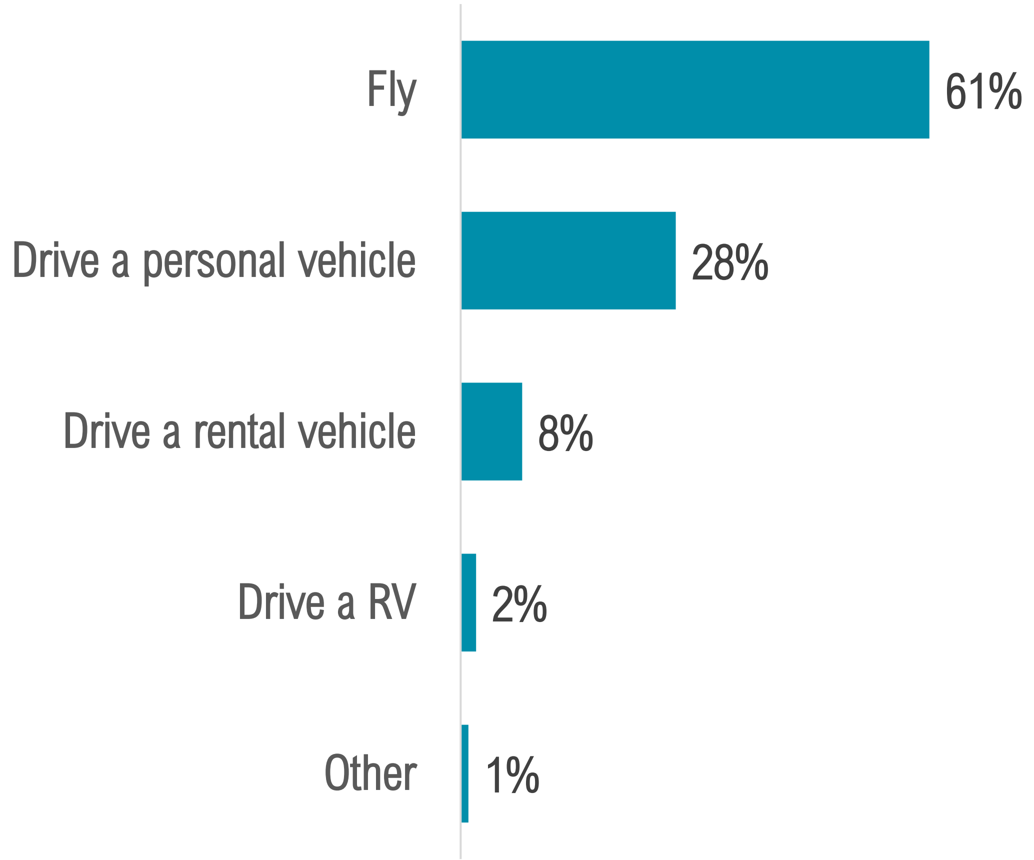
BOOKING

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



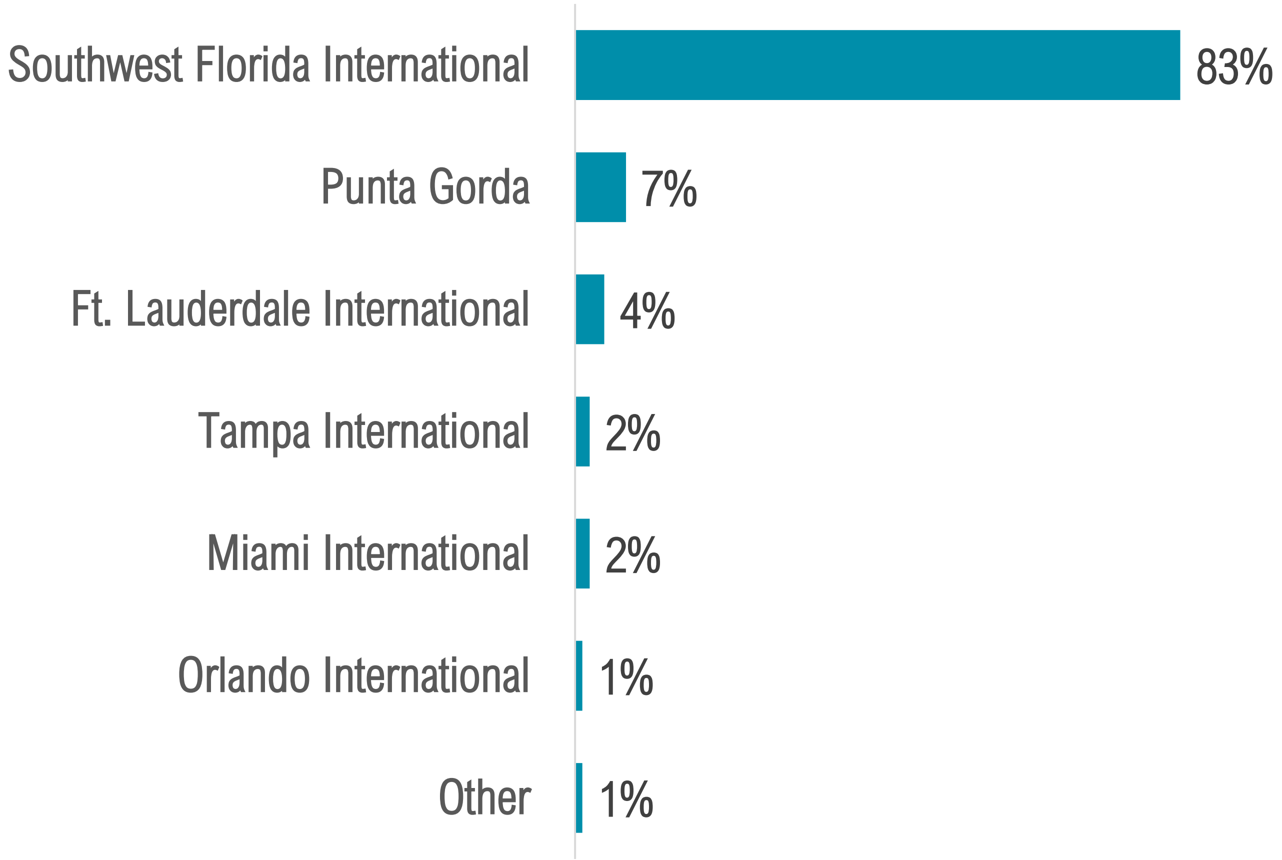
TRANSPORTATION

Over 3 in 5 visitors flew to the Fort Myers area.



AIRPORT

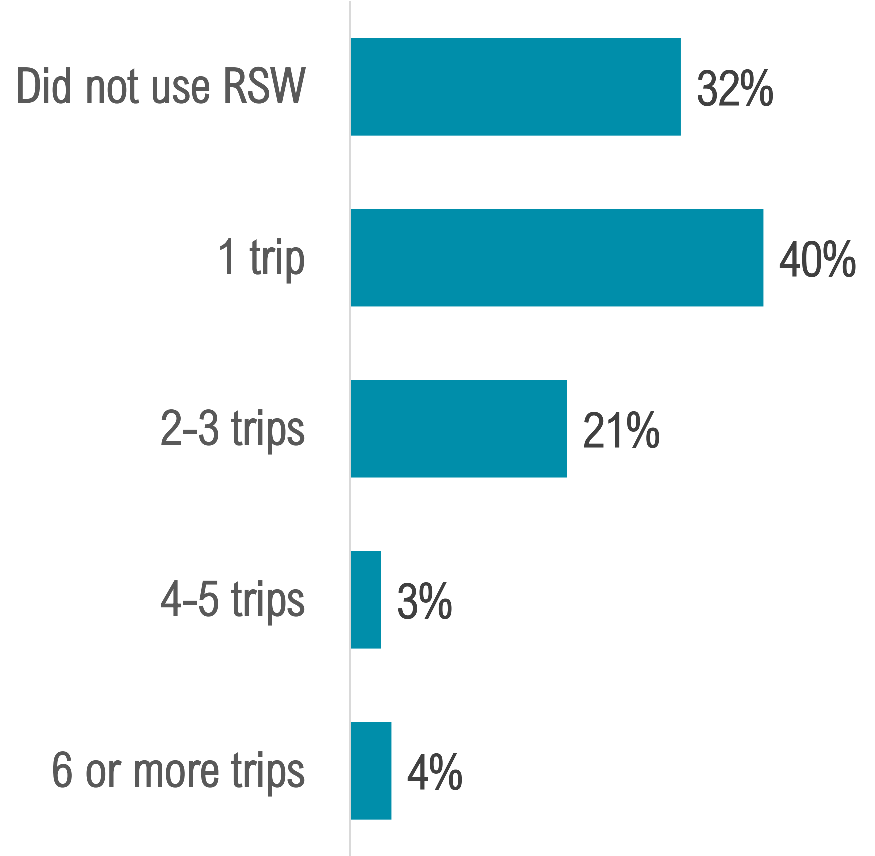
BASE: 61% of visitors who flew



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

USE OF RSW IN THE PAST YEAR

68% of visitors used RSW at least once in the past year.

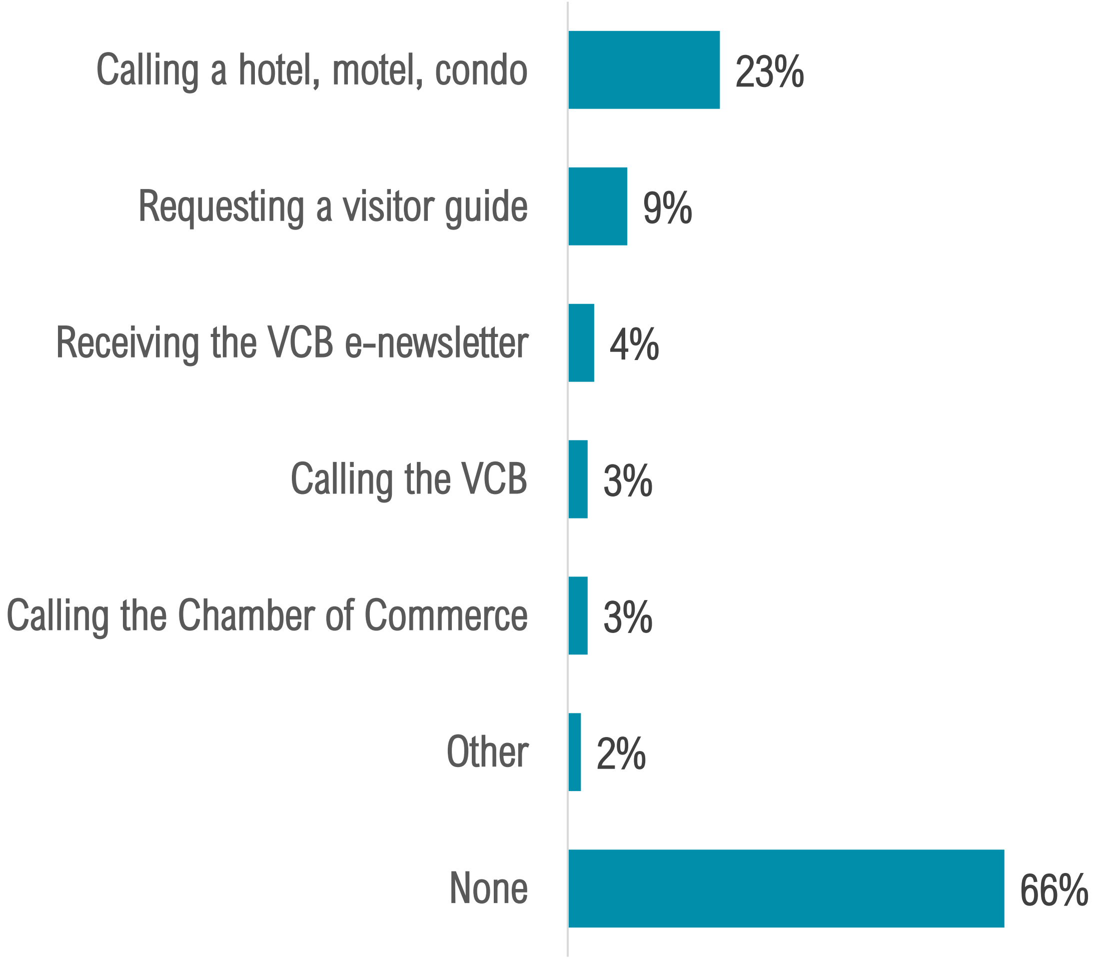


TRIP PLANNING: INFORMATION REQUESTS[1]

Over 1 in 3 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 Q4 2022 was very similar to Q4 2021.



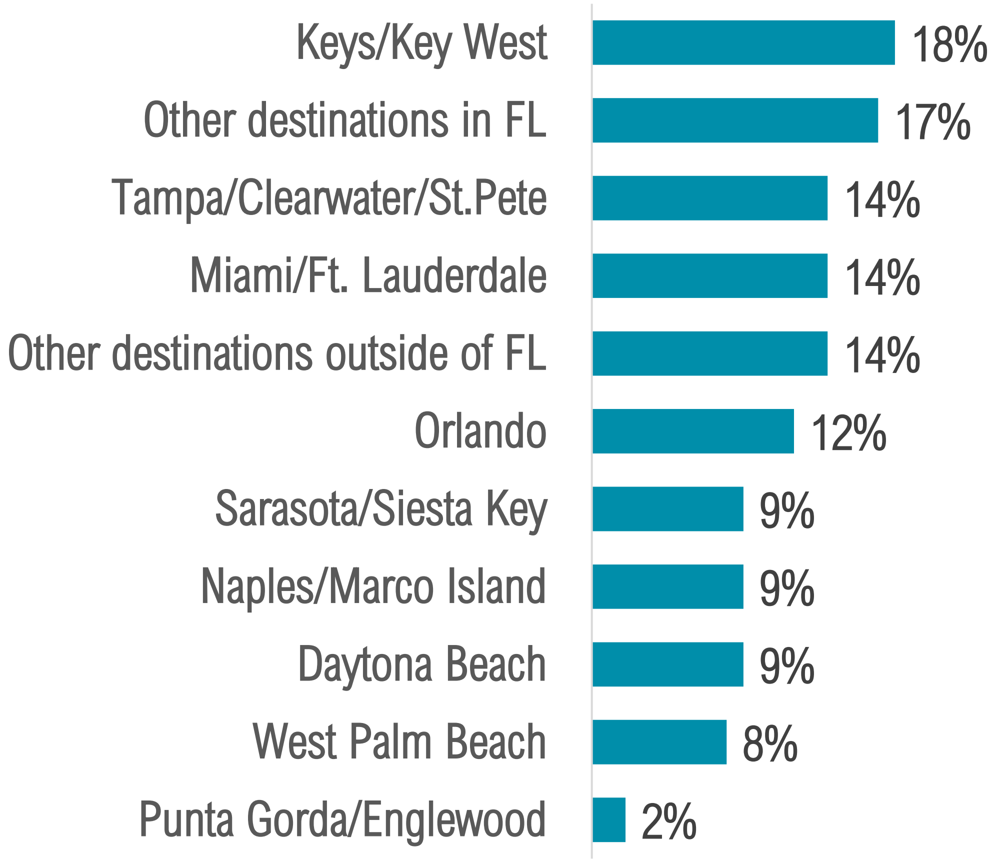
[1]Multiple responses permitted.

TRIP PLANNING: OTHER DESTINATIONS CONSIDERED

Most alternate destinations considered were in Florida.

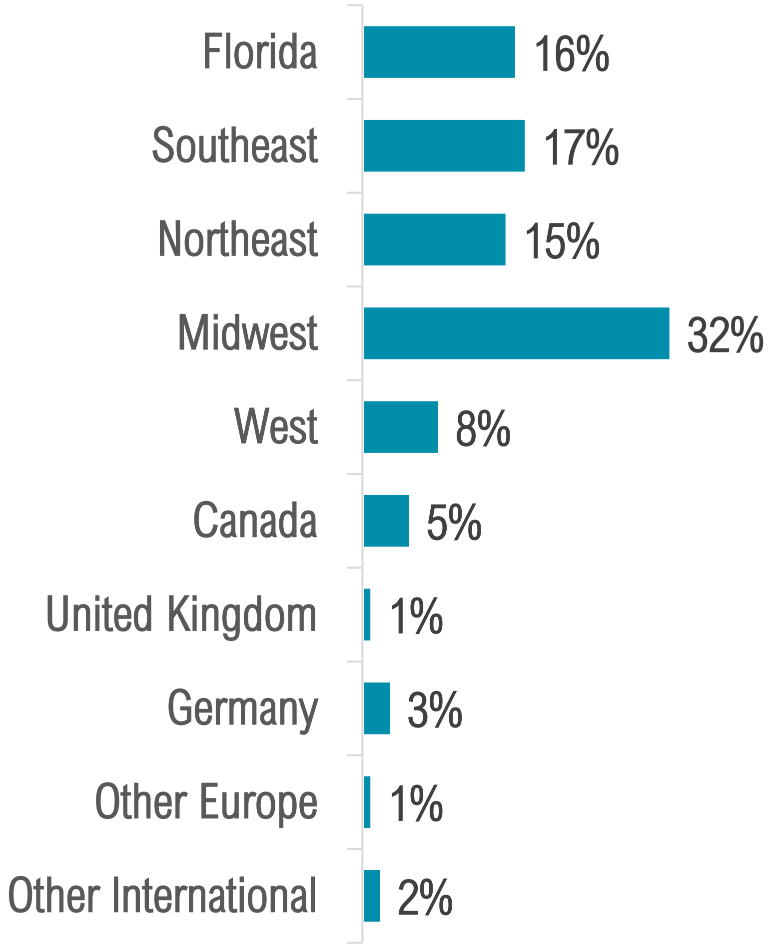
Less than 1 in 7 visitors considered destinations outside of Florida.

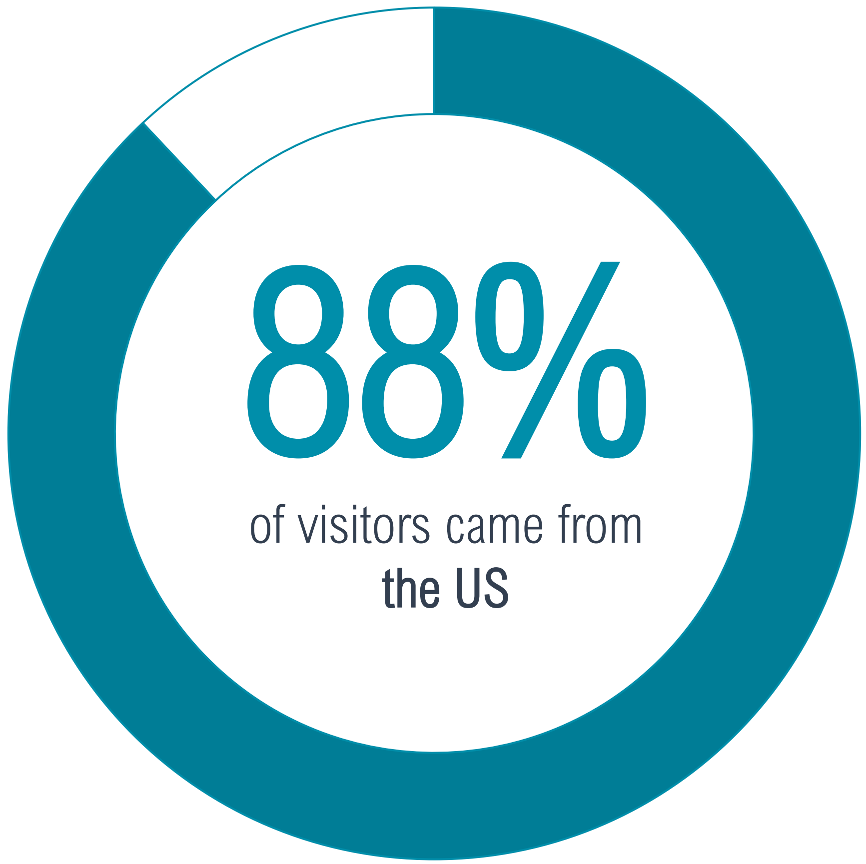
BASE: 22% of visitors who considered other destinations



VISITOR JOURNEY: TRAVEL PARTY PROFILE

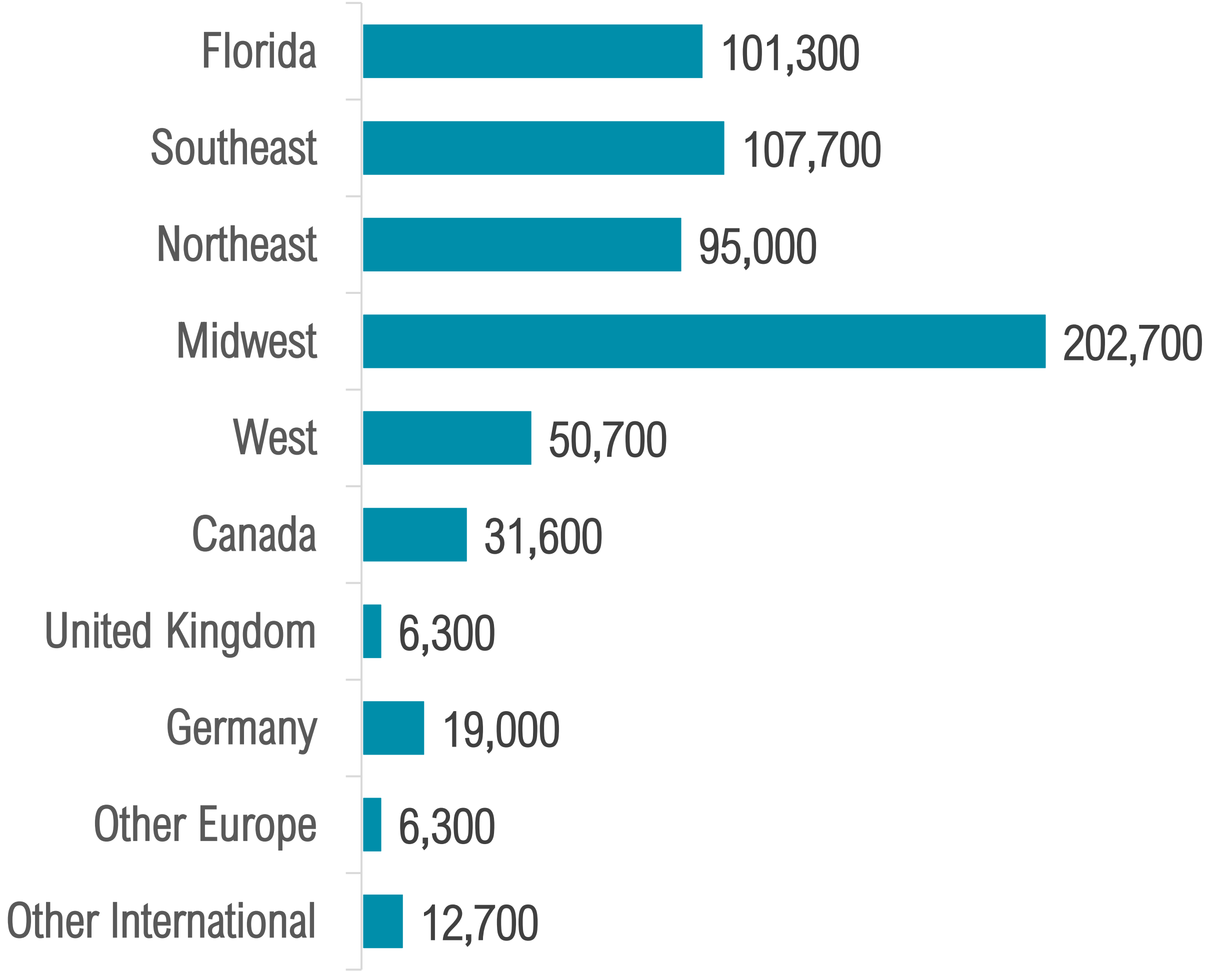
ORIGIN[1]





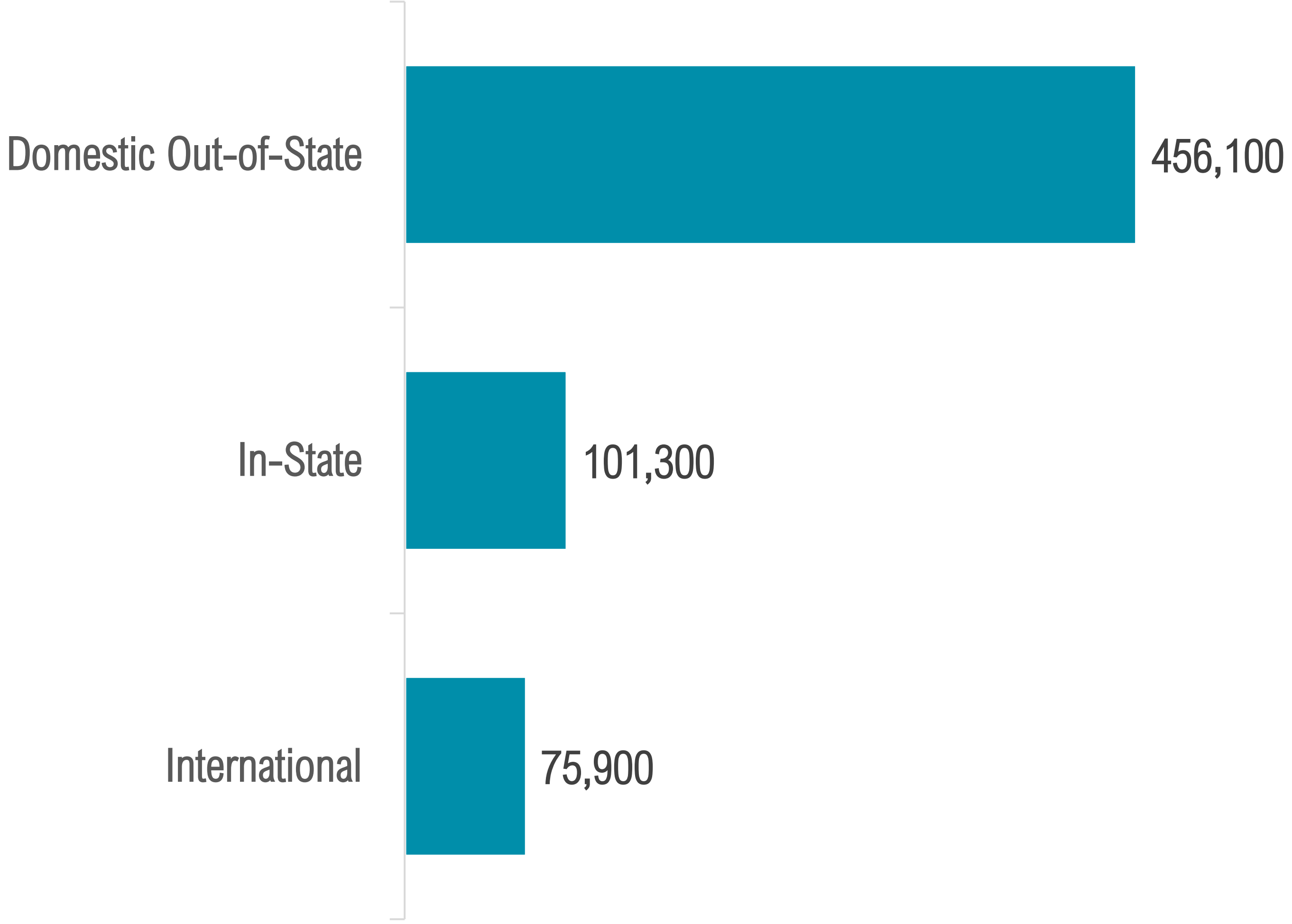
[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers.
Based on the Visitor Tracking Study and supplemental data from Arrivalist.

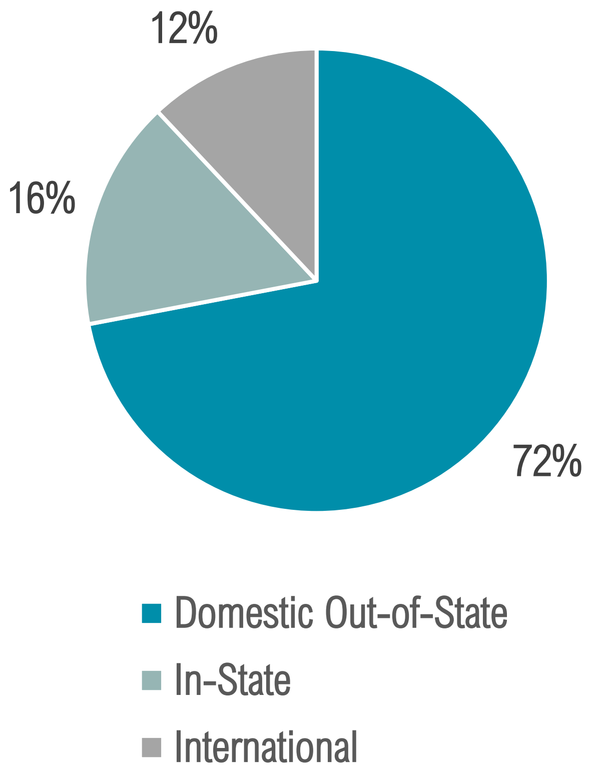
NUMBER OF VISITORS BY ORIGIN[1]



[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

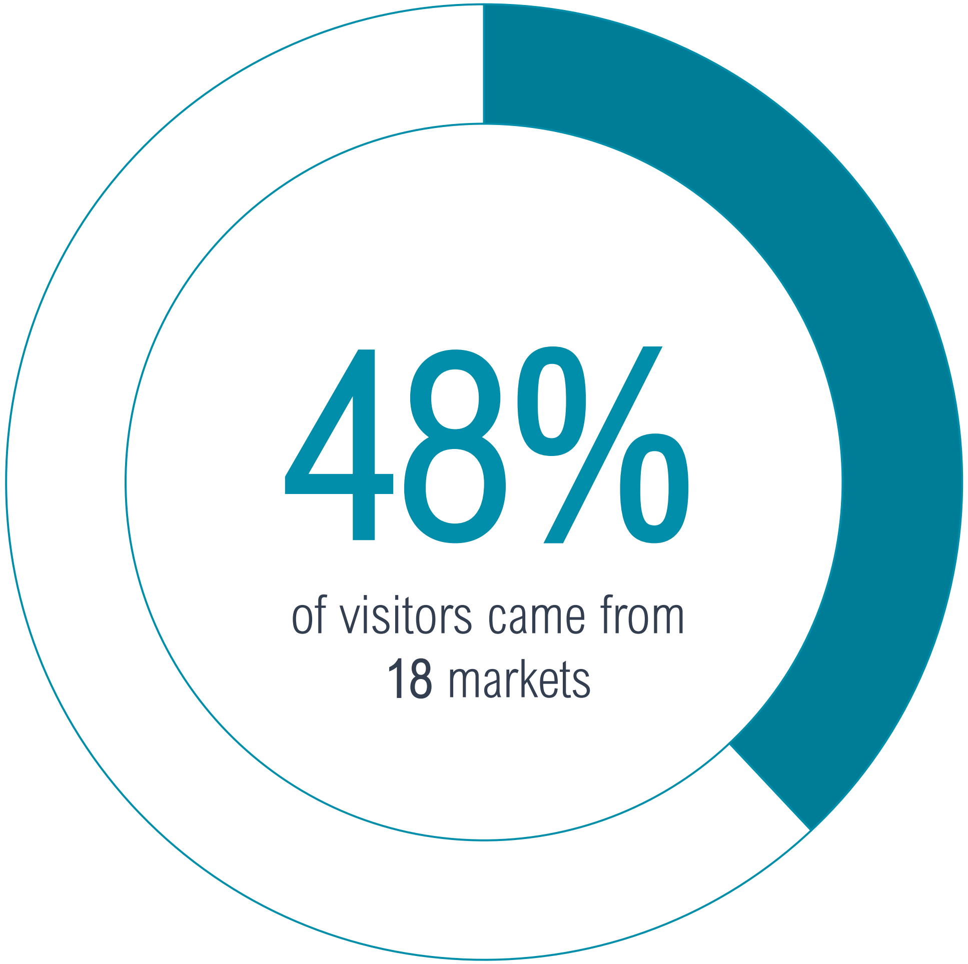




[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers. Based on the Visitor Tracking Study and supplemental data from Arrivalist.

ORIGIN MARKETS[1]

Market [2]	Percentage of Visitors
TAMPA-ST PETERSBURG	5%
MIAMI-FORT LAUDERDALE	4%
NEW YORK	4%
CHICAGO	3%
ATLANTA	3%
ORLANDO-DAYTONA BEACH-MELBOURNE	3%
CLEVELAND-AKRON	3%
MINNEAPOLIS-SAINT PAUL	3%
NAPLES & SURROUNDING AREAS	2%
DENVER	2%
PHILADELPHIA	2%
WASHINGTON, DC-HAGERSTOWN	2%
DETROIT	2%
INDIANAPOLIS	2%
CINCINNATI	2%
PITTSBURGH	2%
BOSTON	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.

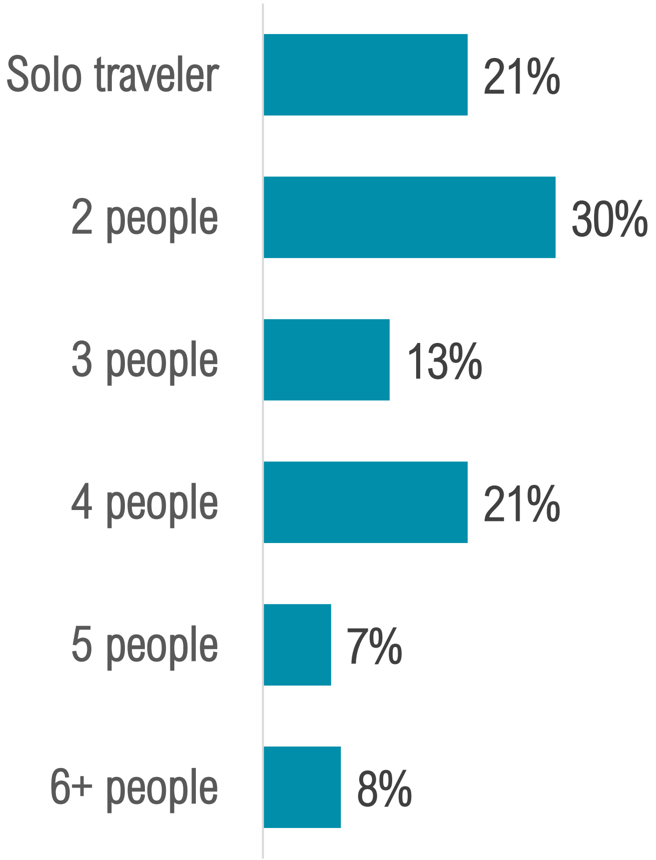
TRAVEL PARTY SIZE AND COMPOSITION

Travel Party Size

Visitors traveled in a party composed of **2.8**[1] **people**.

Travel with Children

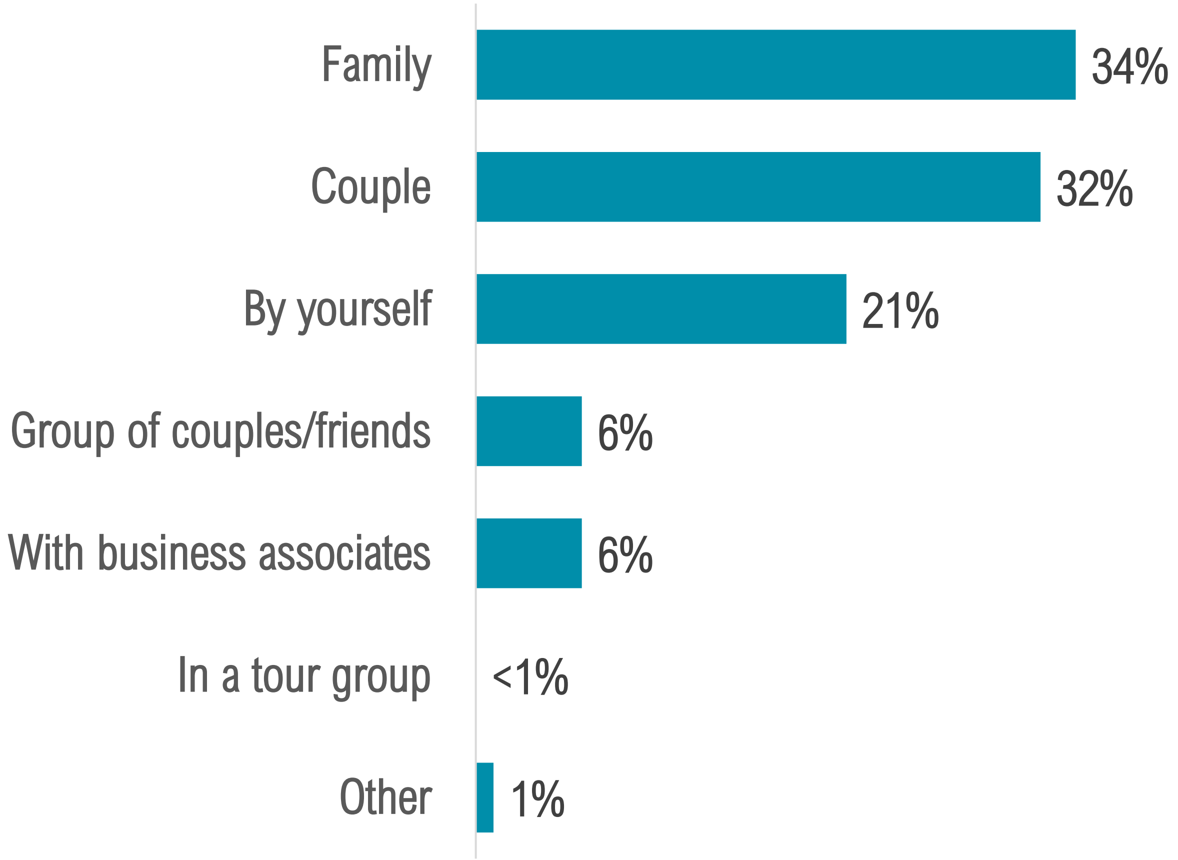
31% of visitors **traveled with children** under the age of 18.



[1]Sources: Occupancy Study and Visitor Tracking Study

TRAVEL PARTY TYPE

Roughly **1 in 3** of visitors traveled either as a **family** or a **couple**, while over **1 in 5** visitors traveled **by themself**.



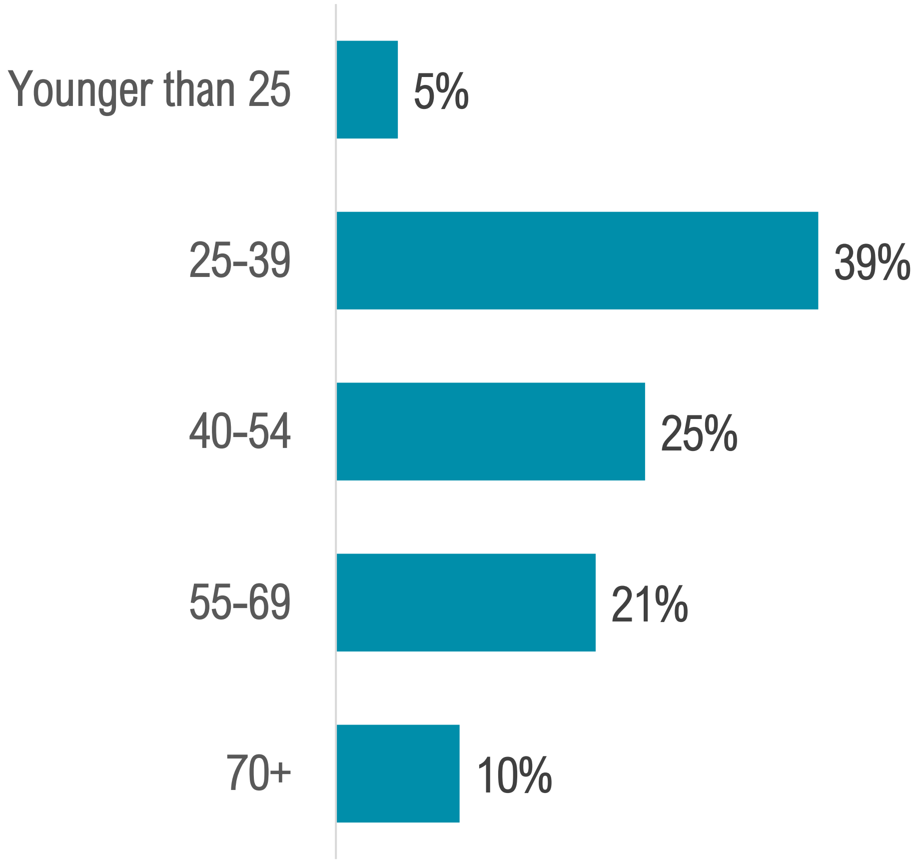
AGE

Average Age

The average age of October - December visitors was **51 years old.**

Median Age

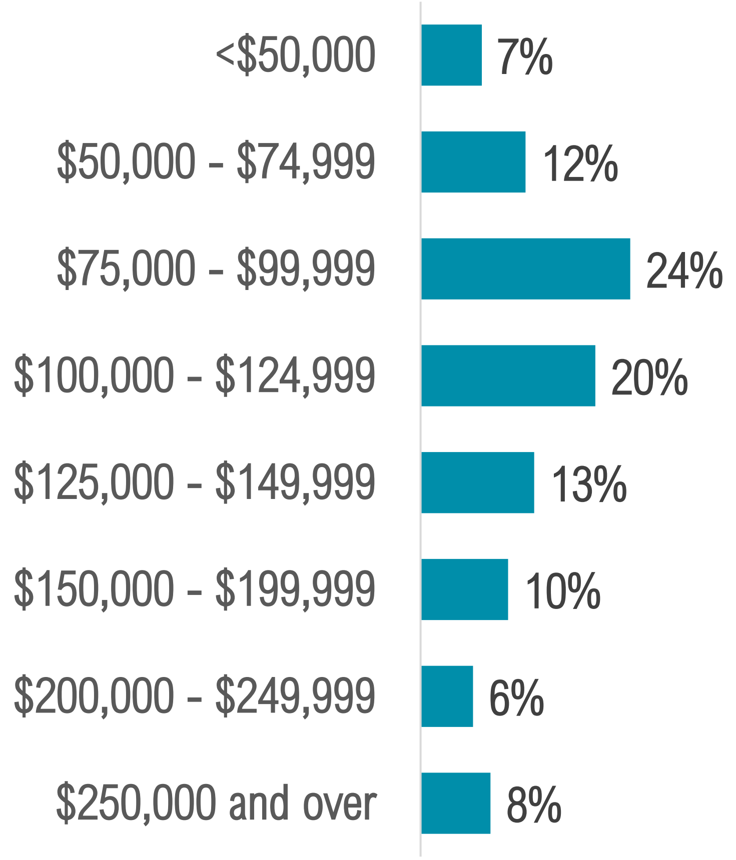
The median age of October - December visitors was **44 years old.**



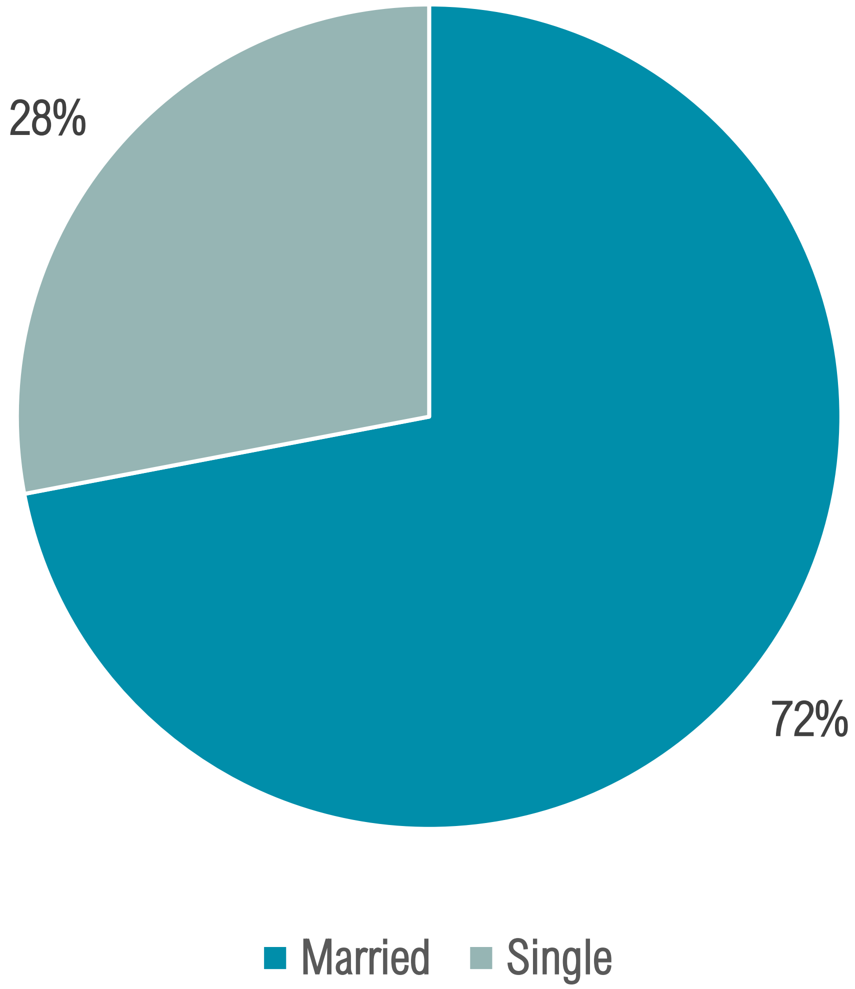
HOUSEHOLD INCOME

Median Household Income
October - December visitors had a median household income of **$108,800.**

14% of visitors had a household income in excess of **$200,000.**

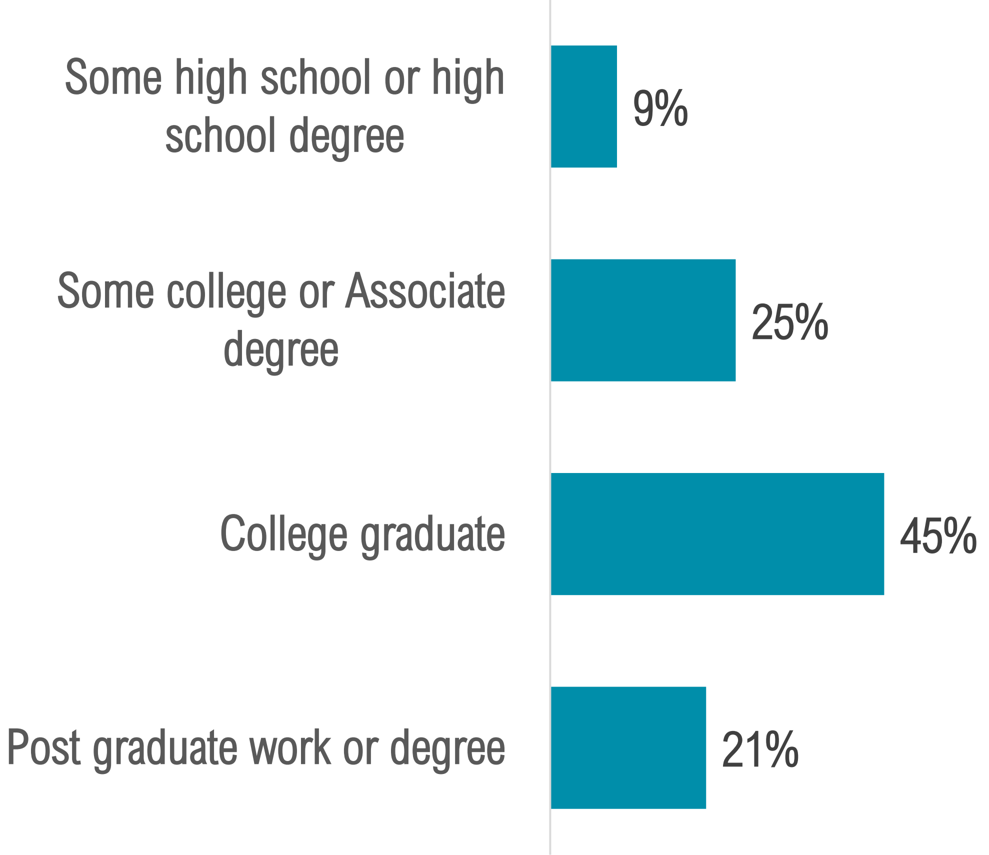


MARITAL STATUS

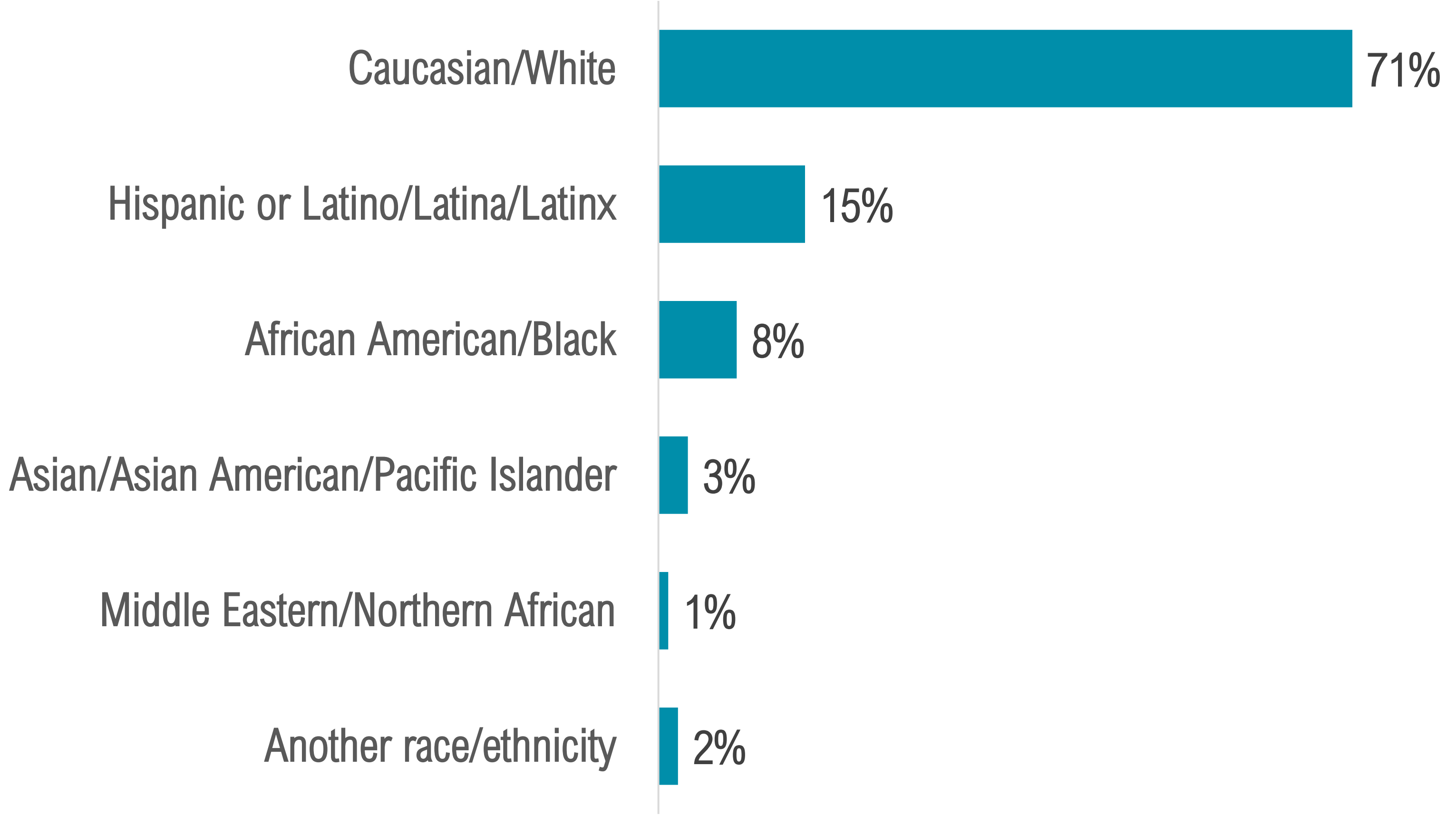


EDUCATION

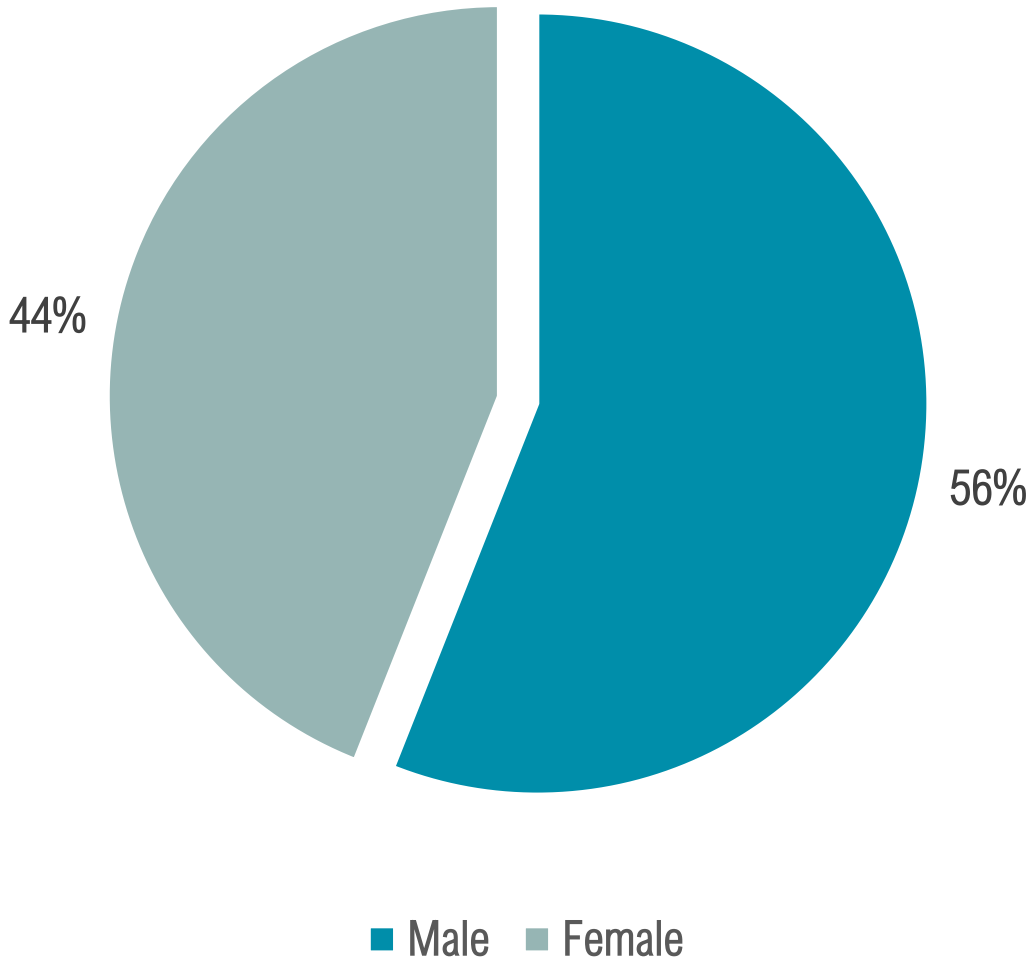
Education Level
2 in 3 of October - December visitors had achieved a bachelor's degree or higher.



RACE/ETHNICITY



GENDER[1]



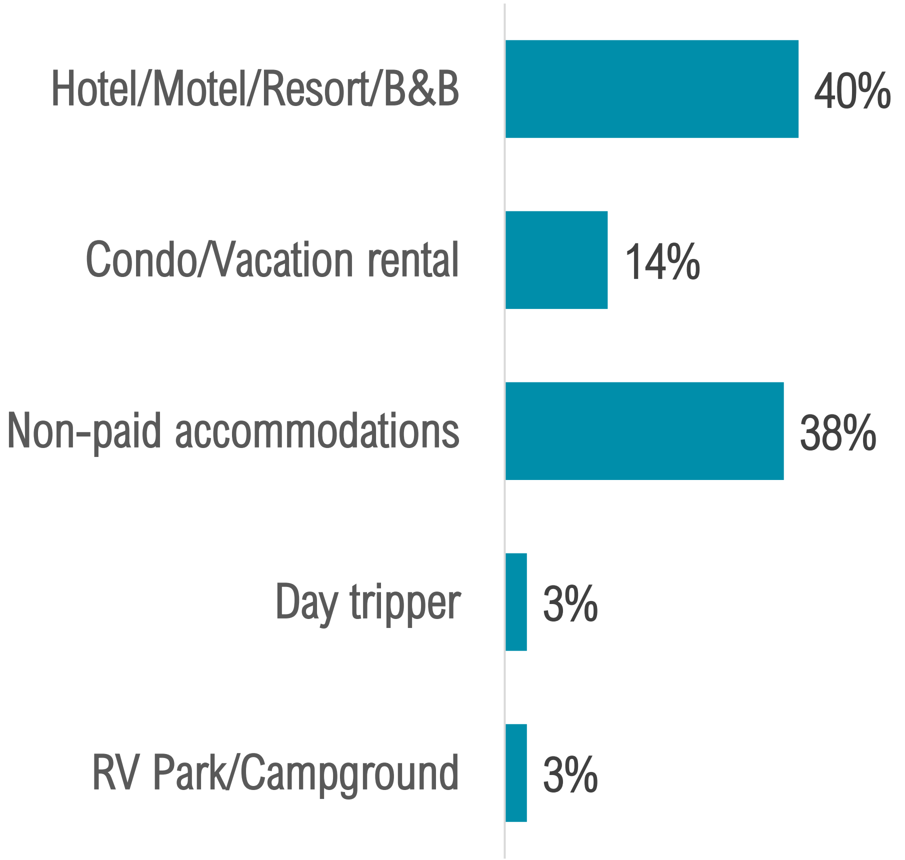
[1]Gender of person interviewed.

VISITOR JOURNEY: TRIP EXPERIENCE

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

ACCOMMODATIONS

Nearly 3 in 5 visitors stayed in paid accommodations such as a hotel/motel/resort/B&B, condo/vacation rental, or an RV Park/Campground.



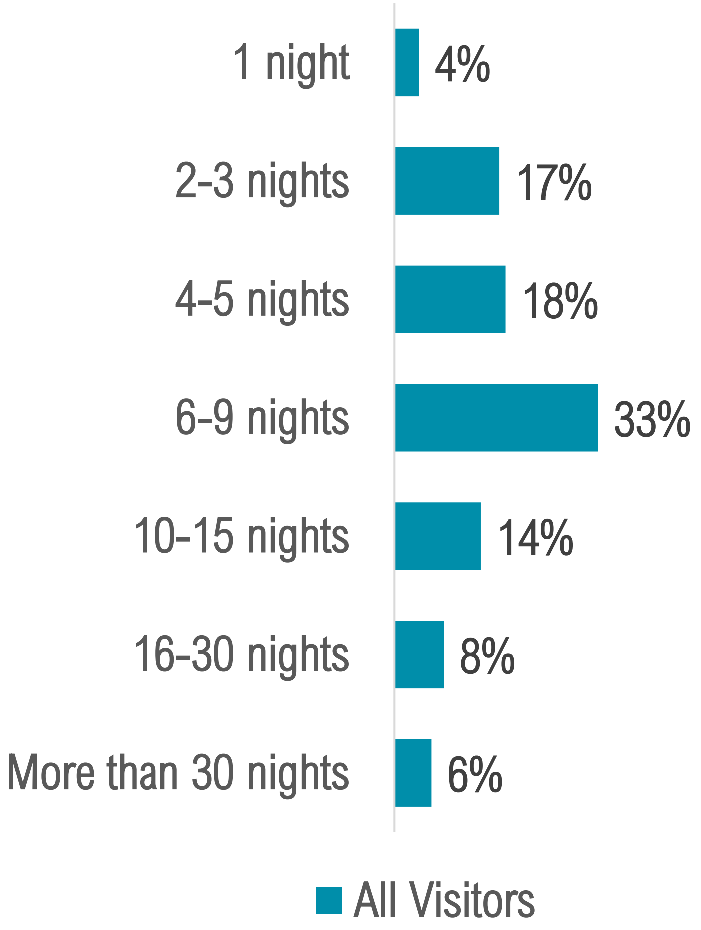
NIGHTS STAYED

All Visitors

Visitors spent an average of 7.8[1] nights in the Fort Myers area.

Visitors Staying in Paid Accommodations

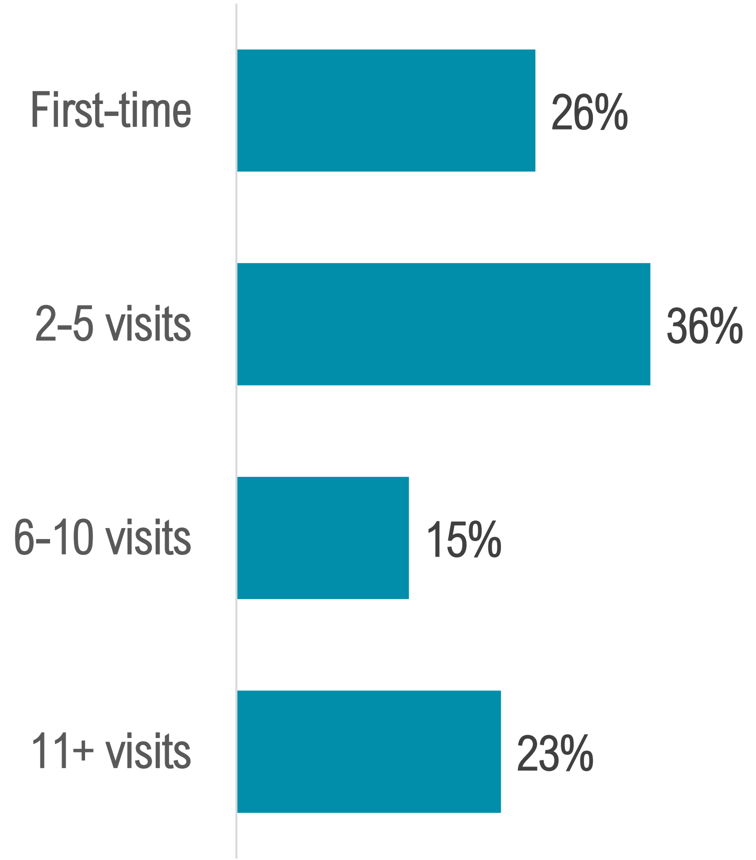
Visitors staying in paid accommodations spent an average of 7.4[2] nights in the Fort Myers area.



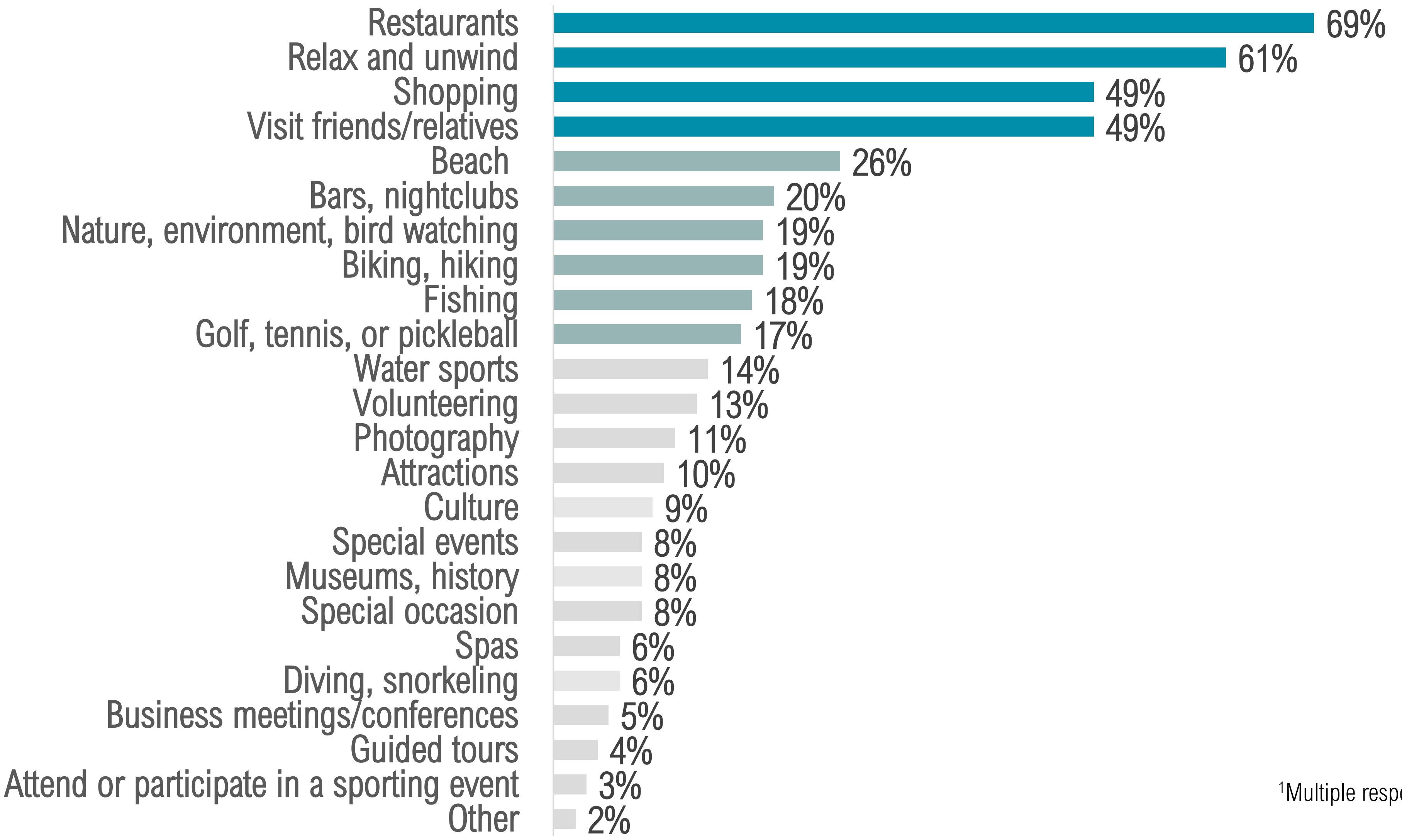
[1]Sources: Occupancy Study and Visitor Tracking Study
[2]Source: Occupancy Study

FIRST TIME AND EXPERIENCED VISITORS

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



VISITOR ACTIVITIES[1]



[1]Multiple responses permitted.

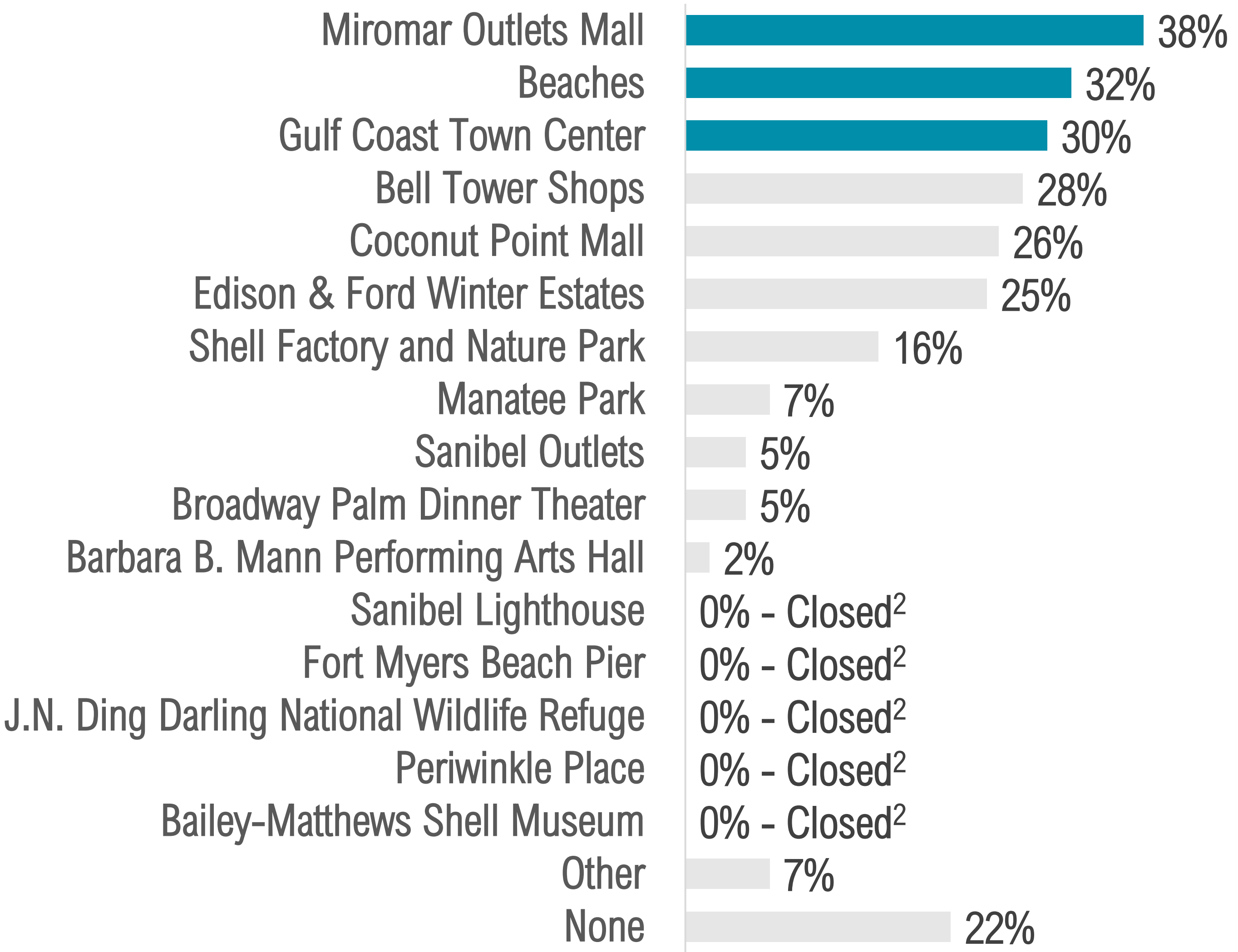
Trip Experience
Oct - Dec 2022

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

Reason for Visiting		Visitor Activities
38%	Visiting friends & relatives	49%
30%	Relax & unwind	61%
13%	Beach	26%
13%	Shopping	49%
11%	Volunteering	13%
8%	Special occasion	8%
8%	Golf or tennis	17%
7%	Fishing	18%
5%	Nature, environment, bird watching	19%
5%	Business meetings/conferences	5%
4%	Water sports	14%
4%	Photography	11%
3%	Attractions	10%
3%	Special event	8%
2%	Biking, hiking	19%
2%	Culture	9%
2%	Sporting event	3%
2%	Diving, snorkeling	6%
1%	Museums, history	8%
1%	Guided tours	4%
1%	Other	2%

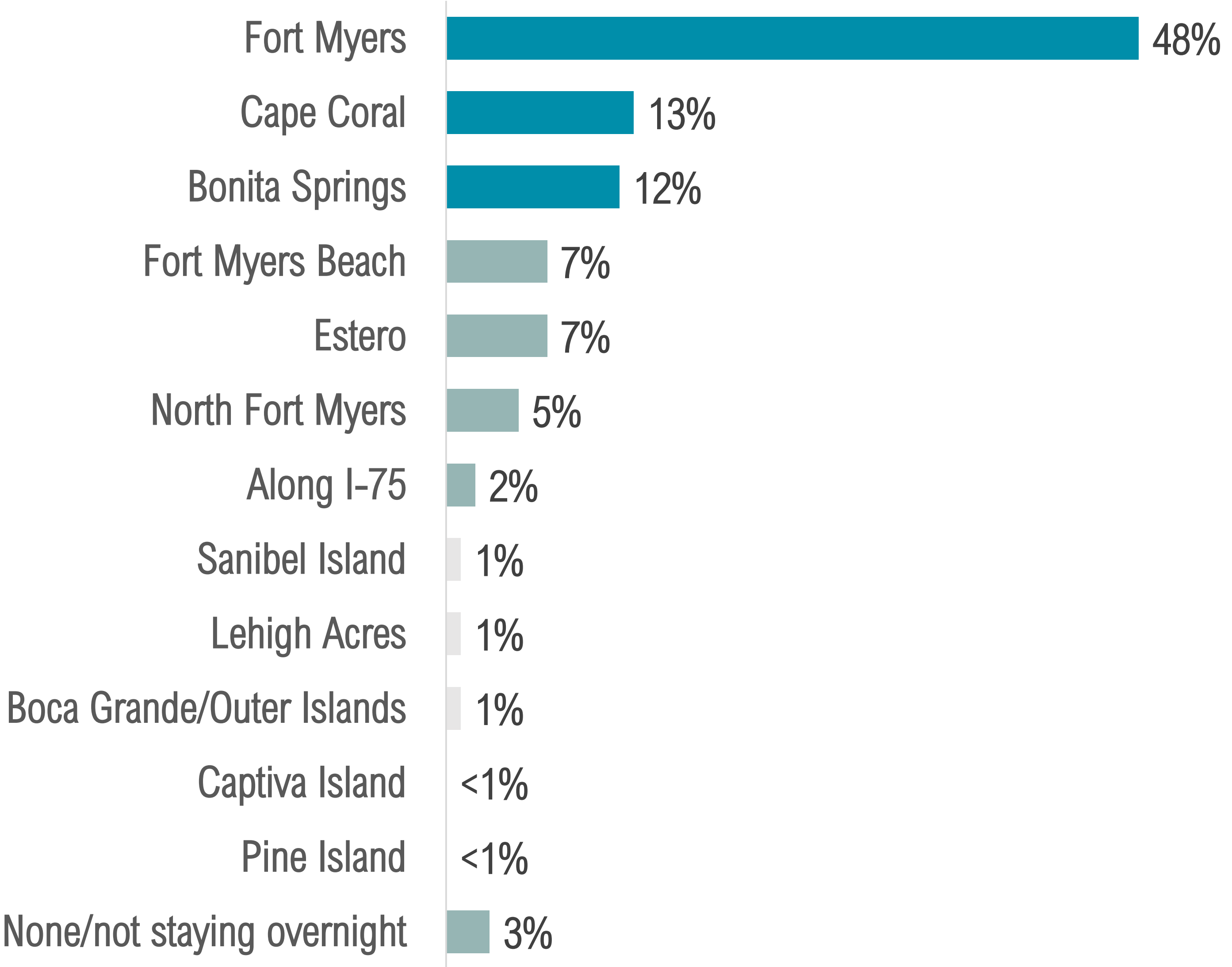
[1]Three responses permitted.
[2]Multiple responses permitted.

ATTRACTIONS VISITED[1]



[1]Multiple responses permitted.
[2]Due to Hurricane Ian.

COMMUNITY STAYED

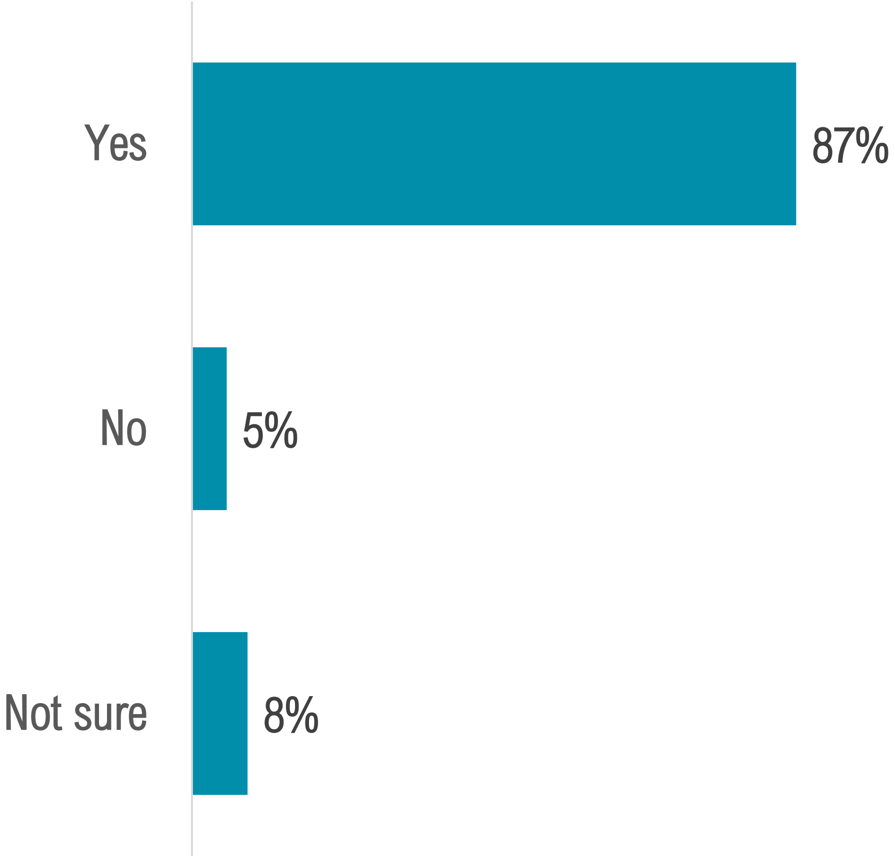


Trip Experience
Oct - Dec 2022

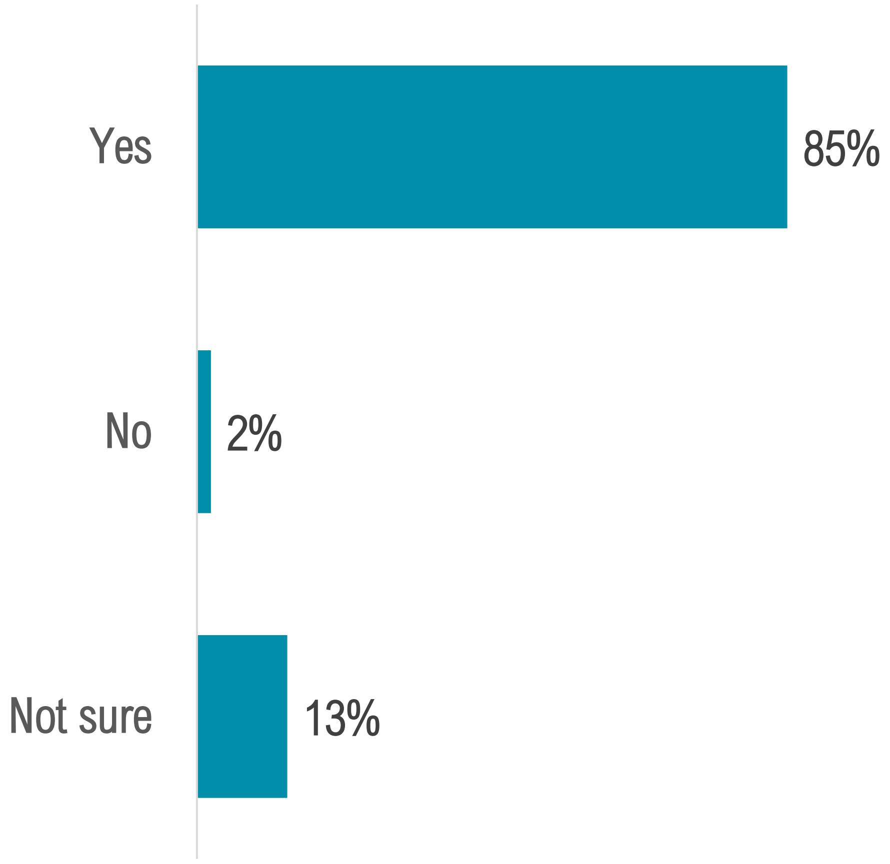
VISITOR JOURNEY: POST-TRIP EVALUATION

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

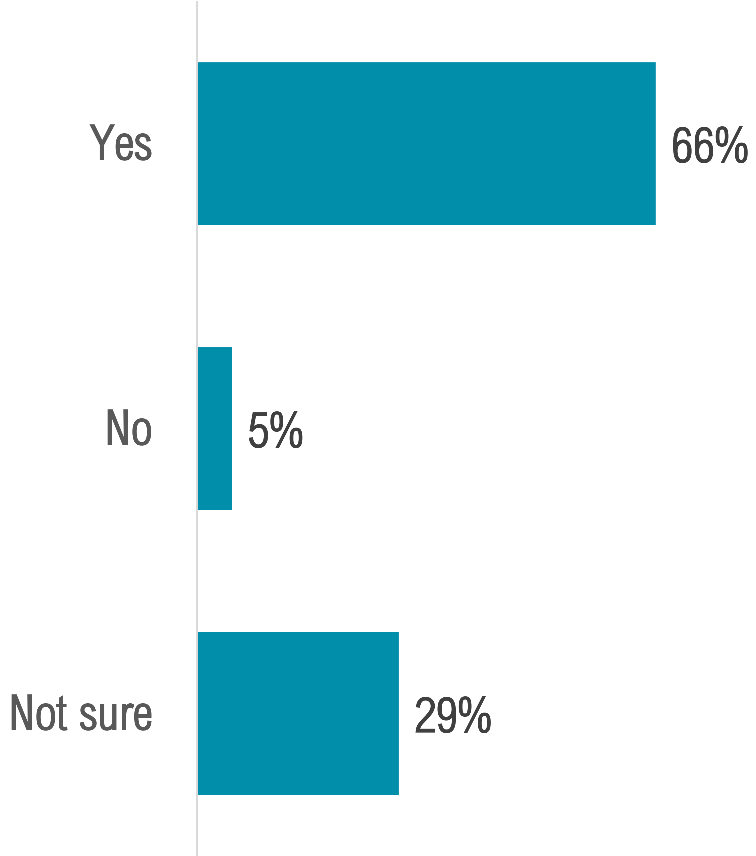
LIKELY TO RECOMMEND



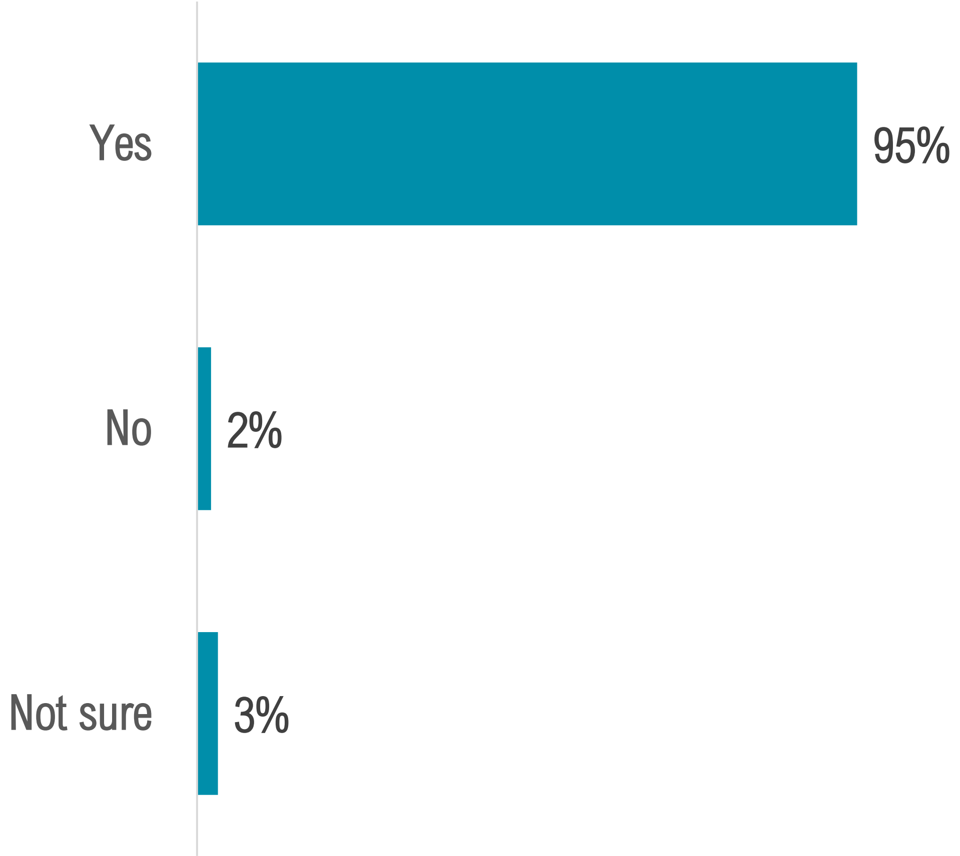
LIKELY TO RETURN



LIKELY TO RETURN NEXT YEAR



FEEL WELCOME

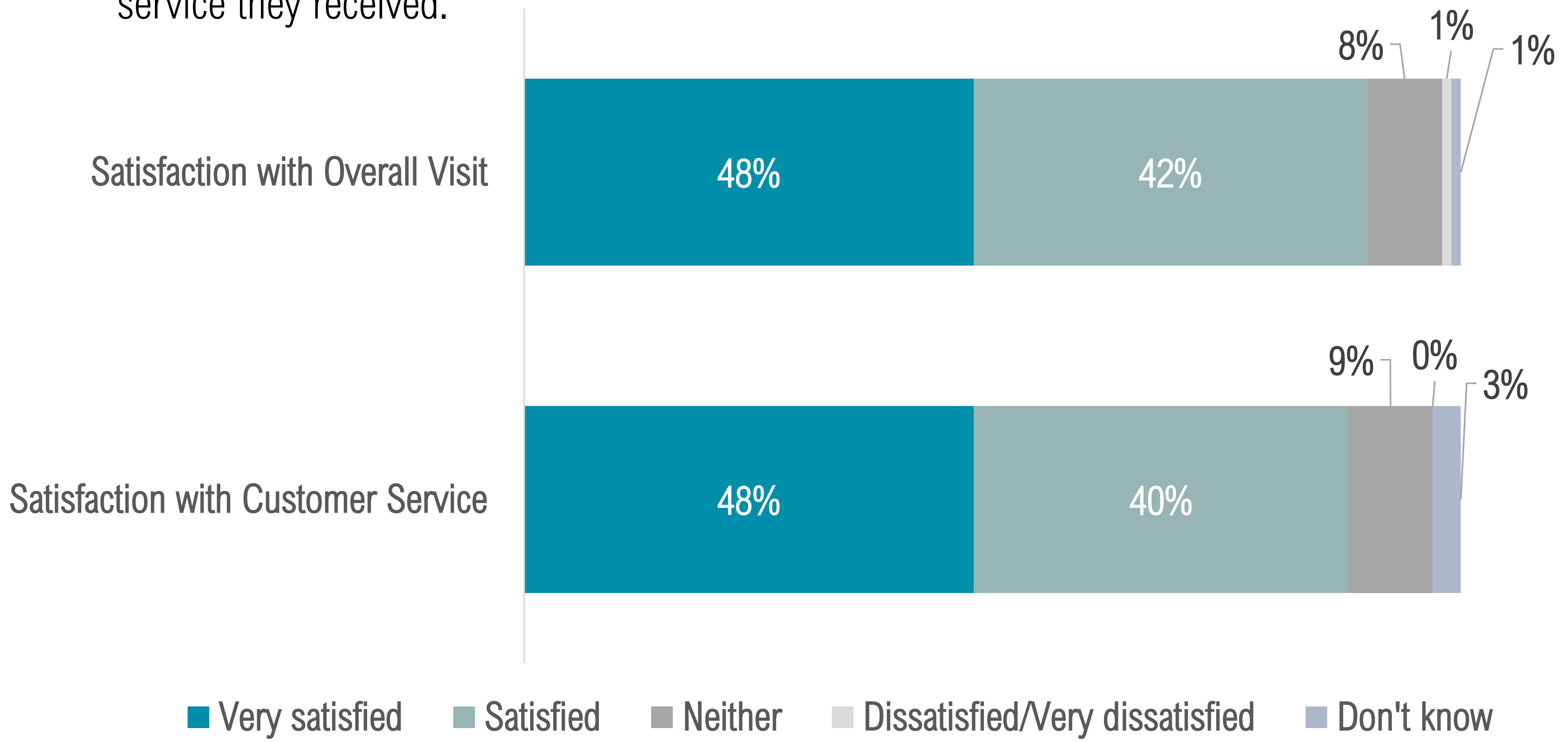


SATISFACTION RATINGS

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2021	2022	2021	2022	2021	2022	2021	2022
Likely to Recommend	91%	86%	96%	88%	94%	86%	96%	96%
Likely to Return	80%	64%	94%	92%	89%	85%	92%	84%
Likely to Return Next Year	39%	43%	71%	72%	60%	65%	67%	80%

SATISFACTION

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



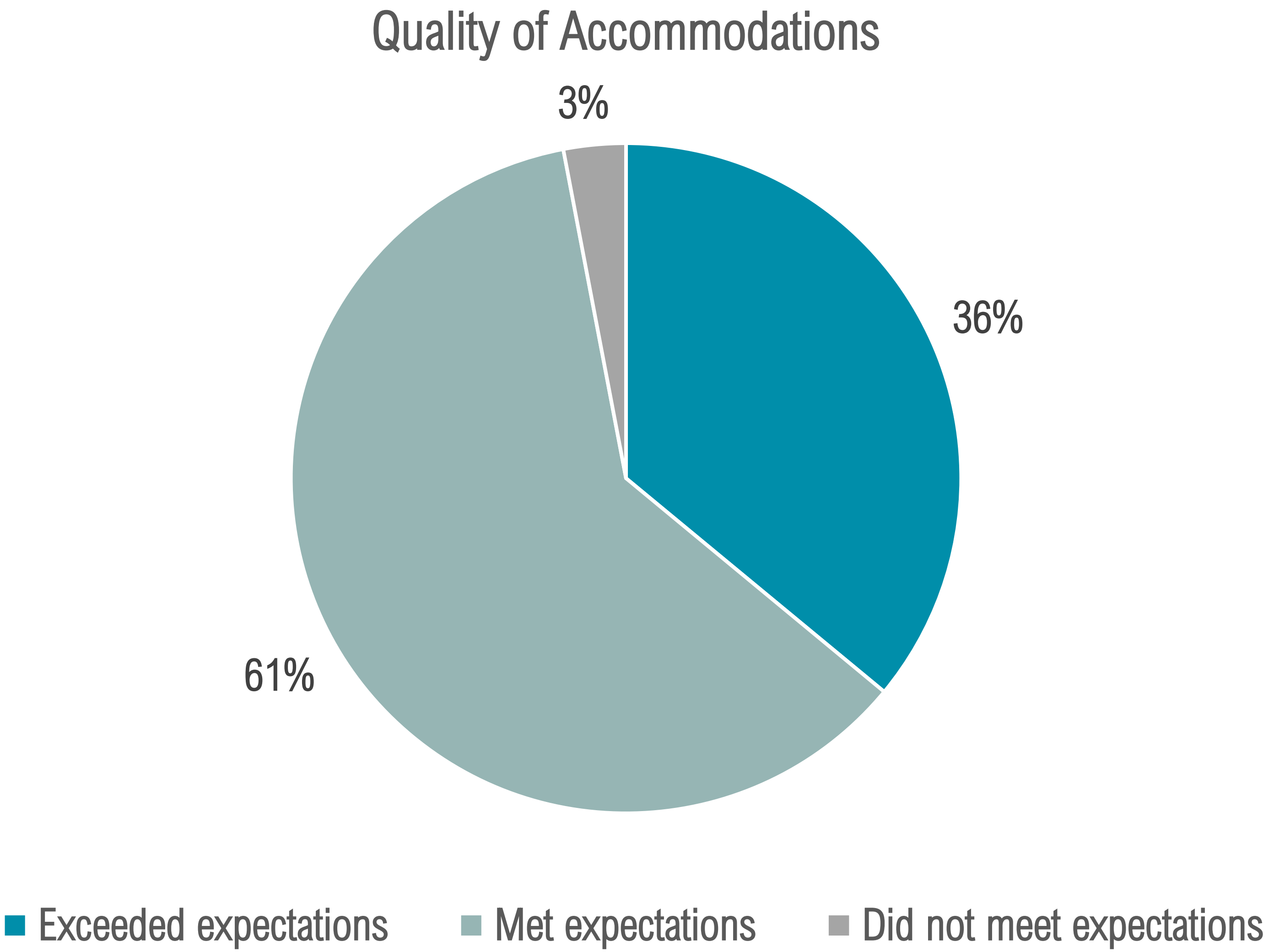
SATISFACTION RATINGS: OVERALL VISIT

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2021	2022	2021	2022	2021	2022	2021	2022
Very Satisfied	56%	42%	71%	50%	66%	47%	59%	61%
Satisfied	39%	48%	27%	40%	31%	42%	40%	37%

SATISFACTION RATINGS: CUSTOMER SERVICE

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2021	2022	2021	2022	2021	2022	2021	2022
Very Satisfied	51%	42%	62%	50%	59%	46%	53%	61%
Satisfied	37%	42%	31%	40%	33%	41%	38%	35%

SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

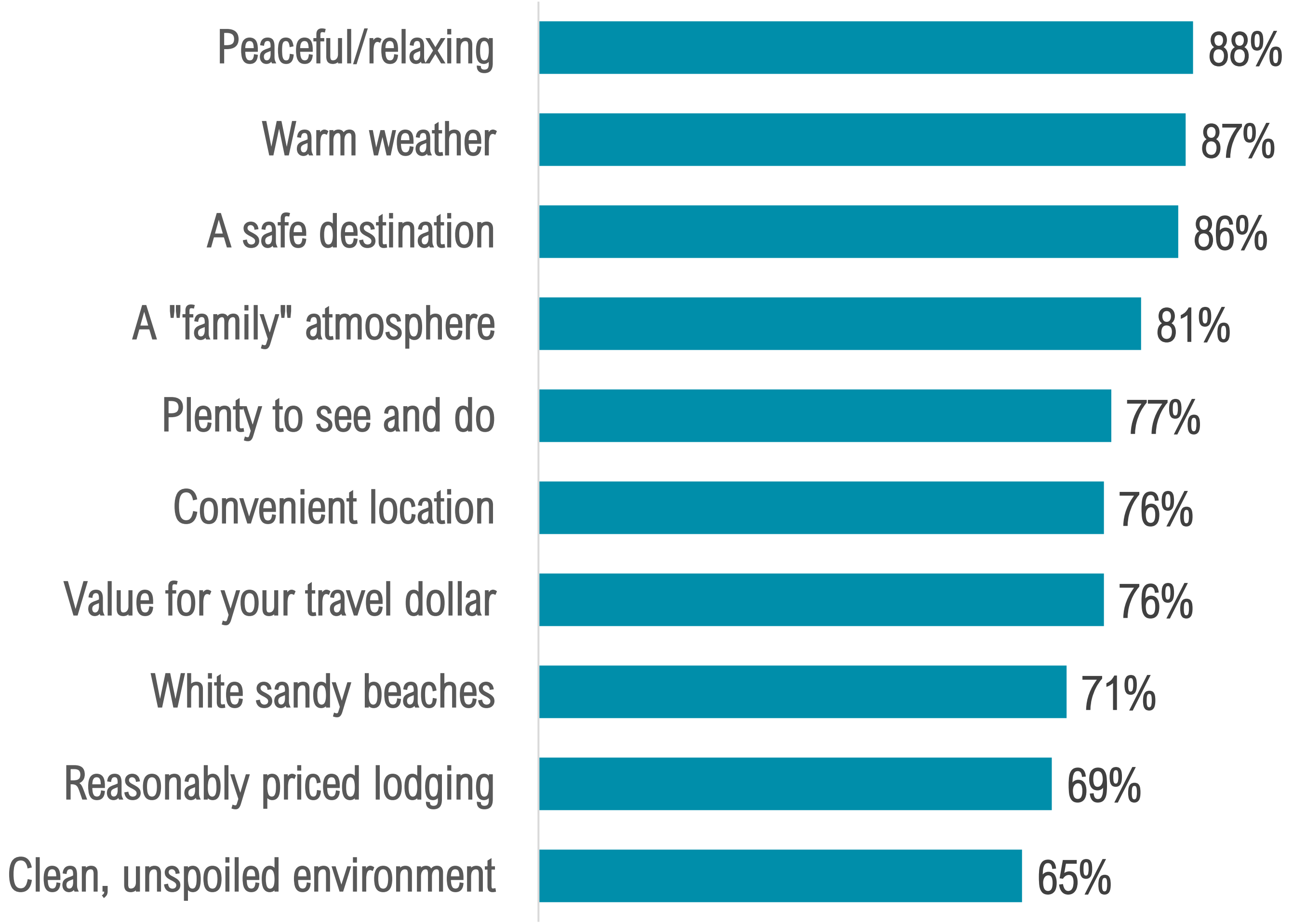


SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2021	2022	2021	2022	2021	2022	2021	2022
Exceeded Expectations	41%	37%	41%	30%	41%	28%	47%	59%
Met Expectations	55%	60%	55%	69%	55%	70%	41%	38%
Did Not Meet Expectations	4%	3%	4%	1%	4%	2%	13%	3%

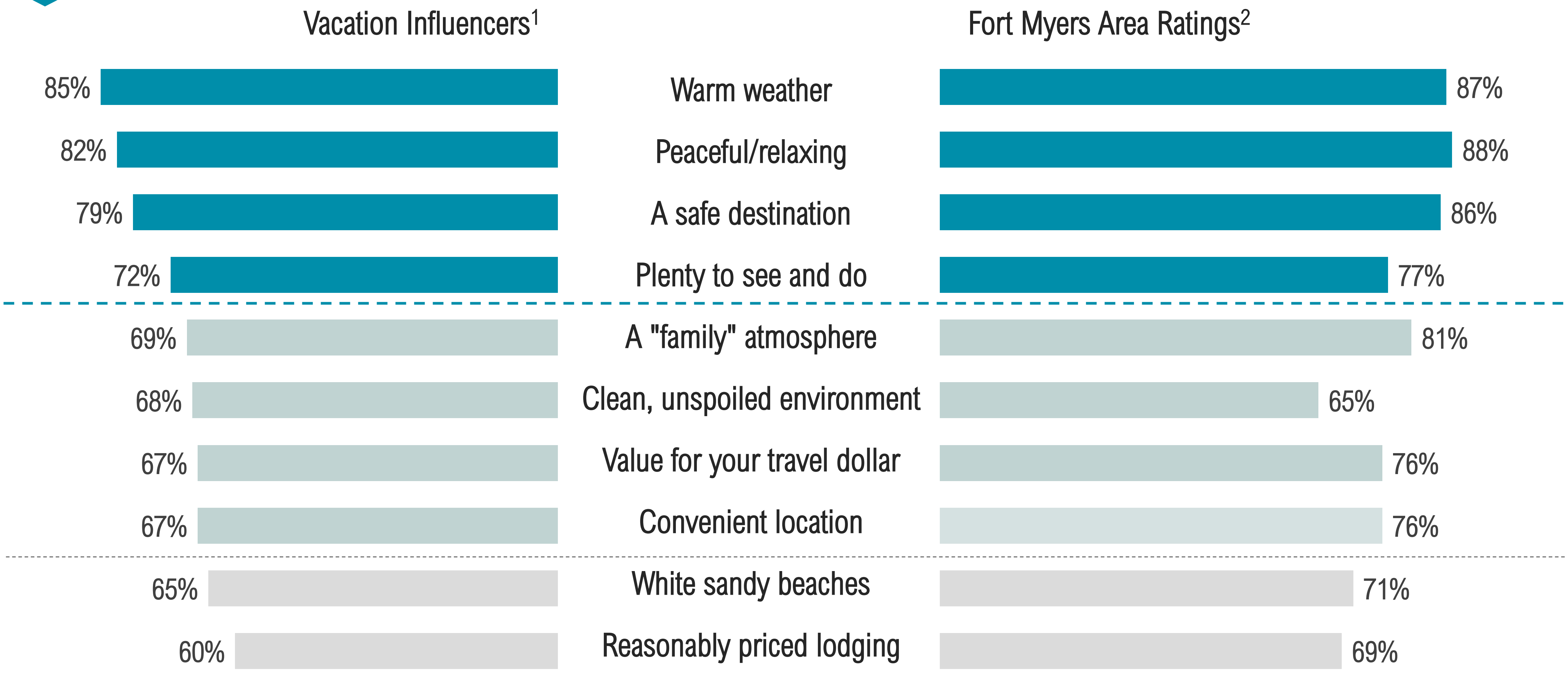
ATTRIBUTE RATINGS[1]

At least **80%** of visitors gave high attribute ratings for **peacefulness, weather, safety, and "family" atmosphere** in the Fort Myers area.



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

VACATION ATTRIBUTE INFLUENCE VS. RATINGS



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

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

Post-Trip Evaluation

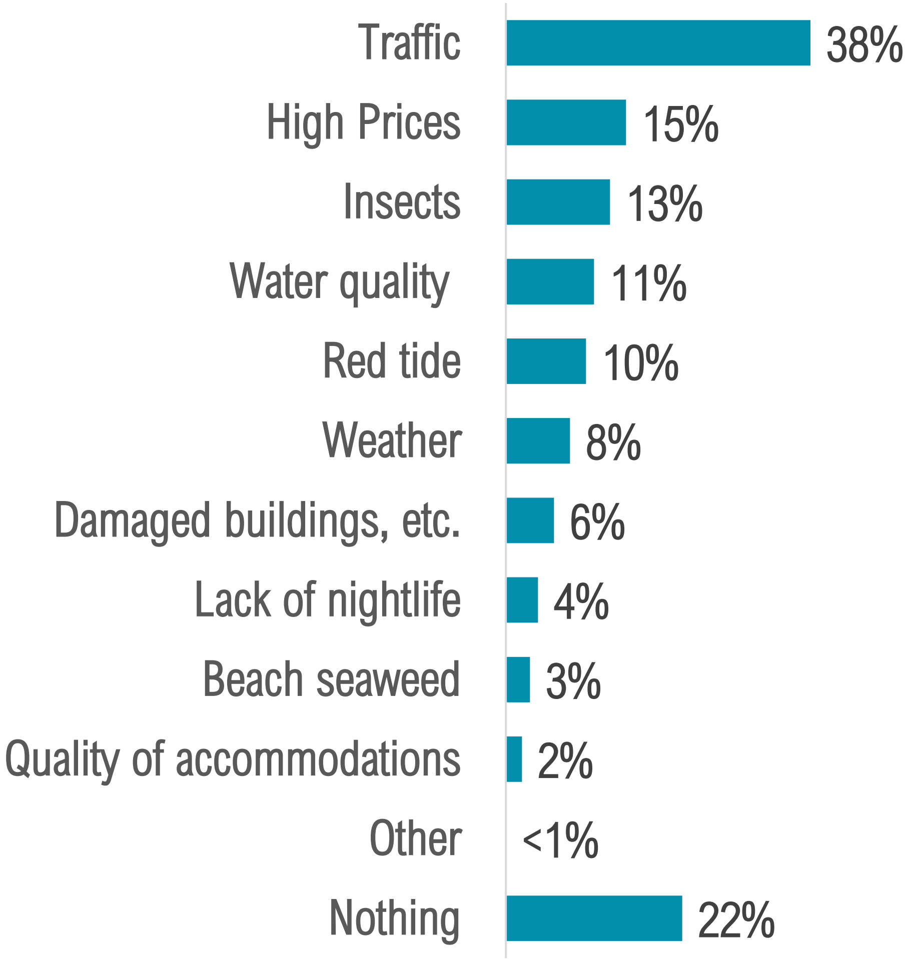
Oct - Dec 2022

fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

downs & st. germain RESEARCH

LEAST LIKED FEATURES[1]

Nearly **2 in 5** visitors were concerned about **Traffic,** while over **1 in 7** were concerned with **high prices** and over **1 in 8** were concerned about **insects** during their visit.



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

AREA DESCRIPTIONS

Warm Weather

- "Wonderful place to vacation with great shopping, restaurants, and warm weather."
- "We had an inspiring vacation with great warm weather and although the impacts of the hurricane are hard to accept, I know the area will come back stronger than ever."
- "Warm with great food and lots to do. What more could you want?"

Peaceful & Relaxing

- "It's the perfect place to visit in Florida. The temperature is lovely because of the gulf breeze and the general vibe is relaxed and welcoming."
- "It's so peaceful here. I love the people and the draw from the Midwest is sweet."
- "It's beautiful, enchanting, fun, and relaxing."

AREA DESCRIPTIONS

Plenty to see and do

- "One of our favorite places to vacation because of the great weather, the friendly people, and there's plenty to see and do."
- "Nice location with a lot to do nearby. Great museums and culture."
- "I love the downtown district. You've got to stay here! There are all kinds of amazingly fun spots to find and explore."

A "Family" Atmosphere

- "It's fun and interesting. The people here are nice and talkative, and they have good service and some really good food as well. I always go with a friend although it's also the perfect place for a family trip."
- "Great vacation destination with perfect weather, great golf courses, lots to see and do, and it's very family-oriented."

OCCUPANCY BAROMETER[1]: JAN – MAR RESERVATIONS

Jan – Mar Reservations	Jan – Mar 2022	Jan – Mar 2023
Up	75%	38%
Same	18%	34%
Down	6%	28%
Not Sure	1%	0%

[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?"

OCCUPANCY BAROMETER[1]: APR – JUN RESERVATIONS

Apr – Jun Reservations	Apr – Jun 2022	Apr – Jun 2023
Up	35%	28%
Same	49%	35%
Down	14%	37%
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 April through June 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	October - December 2021	October - December 2022	% Change '21 – '22
Visitors[1]	1,301,645	633,300	- 51.3%
Visitor Days[1]	7,398,289	4,965,072	- 32.9%
Room Nights[1]	1,779,960	1,078,500	- 39.4%
Direct Expenditures[2]	$959,551,600	$666,254,300	- 30.6%
Total Economic Impact[3]	$1,529,525,300	$1,061,343,100	- 30.6%
Occupancy	68.7%	55.1%	- 19.8%
ADR	$152.67	$152.64	- <0.1%
RevPAR	$104.88	$84.10	- 19.8%

[1] Room nights are down less than Visitors due to the decreased travel party size and increased length of stay.
[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

	October - December 2021	October - December 2022	% Change '21 – '22
Direct Jobs	12,897	8,542	- 33.8%
Total Jobs	17,703	11,793	- 33.4%
Direct Wages	$288,897,100	$200,730,462	- 30.5%
Total Wages	$474,435,800	$341,988,332	- 27.9%
Direct Local Taxes	$29,266,300	$19,987,629	- 31.7%
Total Local Taxes	$51,697,900	$35,554,994	- 31.2%
Direct State Taxes	$68,224,100	$47,304,055	- 30.7%
Total State Taxes	$100,183,800	$68,987,302	- 31.1%

VISITOR TYPE

Visitor Type	October - December 2021	October - December 2022
Visitors in Paid Accommodations	75%	59%
Visitors in Non-Paid Accommodations	22%	38%
Day Trippers	3%	3%

PRE-VISIT

Planned trip in advance	October - December 2021	October - December 2022
1 week or less	4%	8%
2-4 weeks	10%	16%
1-2 months	28%	26%
3-6 months	32%	30%
6 months or more	22%	17%
Not sure	4%	3%

Considered Other Destinations	October - December 2021	October - December 2022
Yes	22%	22%
No	78%	78%

PRE-VISIT

Other destinations considered[1]	October - December 2021[2]	October - December 2022[3]
Keys/Key West	7%	18%
Other destinations in FL	15%	17%
Tampa/Clearwater/St. Pete	11%	14%
Miami/Ft. Lauderdale	8%	14%
Other destinations outside of FL	28%	14%
Orlando	8%	12%
Sarasota/Siesta Key	6%	9%
Naples/Marco Island	3%	9%
Daytona Beach	4%	9%
West Palm Beach	3%	8%
Punta Gorda/Englewood	<1%	2%

[1]Multiple responses permitted.
[2]Base: 22% of visitors who considered other destinations.
[3]Base: 22% of visitors who considered other destinations.

PRE-VISIT

Trip Planning Websites/Apps[1]	October - December 2021	October - December 2022
Airline websites/apps	29%	29%
Online search engines	28%	26%
Airbnb, VRBO, HomeAway etc.	22%	19%
Hotel websites/apps	17%	17%
Booking websites	16%	17%
Trip Advisor	17%	12%
Vacation rental websites/apps	16%	11%
Traveler reviews, blogs, stories	11%	10%
Visit Florida	8%	9%
www.VisitFortMyers.com	7%	9%
VCB Facebook Page	8%	9%
Facebook	7%	8%
Instagram	3%	4%
YouTube, Hulu, Pandora	4%	3%
None	20%	24%
Other	7%	4%

[1]Multiple responses permitted.

PRE-VISIT

Information Requests[1]	October - December 2021	October - December 2022
Calling a hotel, motel, condo	23%	23%
Requesting and receiving a visitor guide	7%	9%
Receiving the VCB e-newsletter	4%	4%
Calling the VCB	3%	3%
Calling a local Chamber of Commerce	3%	3%
Other	3%	2%
None	67%	66%

[1]Multiple responses permitted.

PRE-VISIT

Recall of Lee County Promotions	October - December 2021	October - December 2022
Yes	33%	40%
No	50%	46%
Can't recall	17%	14%
% of recallers influenced by promotions	50%	52%
% of total visitors influenced by promotions	17%	21%

PRE-VISIT

Type of Promotions Recalled[1]	October - December 2021[2]	October - December 2022[3]
Internet	44%	46%
Social media	34%	34%
Traveler reviews, blogs	18%	20%
Television	16%	16%
www.VisitFortMyers.com	7%	10%
Travel/visitor guide	11%	8%
Newspaper	4%	7%
Radio	4%	6%
Magazine	9%	6%
AAA	8%	5%
Brochure	6%	4%
Deal-based promotion	5%	4%
Billboard	4%	2%
Other	5%	5%

[1]Multiple responses permitted.
[2]Base: 33% of visitors who recalled seeing a promotion.
[3]Base: 40% of visitors who recalled seeing a promotion.

PRE-VISIT

Characteristics influencing decision to visit Lee County (top 2 boxes)[1]	October - December 2021	October - December 2022
Warm weather	92%	85%
Peaceful/relaxing	91%	82%
A safe destination	87%	79%
Plenty to see and do	77%	72%
A "family" atmosphere	72%	69%
Clean, unspoiled environment	85%	68%
Value for your travel dollar	75%	67%
Convenient location	78%	67%
White sandy beaches	84%	65%
Reasonably priced lodging	72%	60%

[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]	October - December 2021	October - December 2022
Visiting friends & relatives	19%	38%
Relax & unwind	40%	30%
Checking-in on my property post-hurricane	NA	16%
Beach	47%	13%
Shopping	5%	13%
Volunteering	1%	11%
Work-related hurricane recovery	NA	11%
Special occasion	8%	8%
Golf or tennis	5%	8%
Fishing	7%	7%
Nature, environment, bird watching	10%	5%
Business meetings/conferences	2%	5%
Water sports	6%	4%
Photography	4%	4%
Attractions	3%	3%
Special event	3%	3%
Biking, hiking	6%	2%
Culture	2%	2%
Sporting event	3%	2%
Diving, snorkeling	2%	2%
Part-time resident ("Snowbird")	NA	1%
Museums, history	2%	1%
Guided tours	2%	1%
Other	6%	1%

[1]Multiple responses permitted.

PRE-VISIT

Transportation	October - December 2021	October - December 2022
Fly	65%	61%
Drive a personal vehicle	27%	28%
Drive a rental vehicle	4%	8%
Drive a RV	3%	2%
Travel by bus	<1%	<1%
Other	1%	1%

Airport Used	October - December 2021	October - December 2022
Southwest Florida International	83%	83%
Punta Gorda	6%	7%
Ft. Lauderdale International	4%	4%
Tampa International	3%	2%
Miami International	2%	2%
Orlando International	1%	1%
Other	1%	1%

TRAVEL PARTY PROFILE

Visitor Origin[1]	October - December 2021	October - December 2022
Florida	13%	16%
Southeast	18%	17%
Northeast	16%	15%
Midwest	38%	32%
West	8%	8%
Canada	3%	5%
United Kingdom	1%	1%
Germany	1%	3%
Other Europe	1%	1%
Other International	1%	2%

Visitor Origin[1]	October - December 2021	October - December 2022
TAMPA-ST PETERSBURG	3%	5%
MIAMI-FORT LAUDERDALE	3%	4%
NEW YORK	5%	4%
CHICAGO	4%	3%
ATLANTA	3%	3%
ORLANDO-DAYTONA BEACH-MELBOURNE	1%	3%
CLEVELAND-AKRON	4%	3%
MINNEAPOLIS-SAINT PAUL	4%	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	October - December 2021	October - December 2022
Mean travel party size	3.0	2.8
Travel with children under age 18	30%	31%

Travel Party Composition	October - December 2021	October - December 2022
As a family	38%	34%
As a couple	37%	32%
By yourself	10%	21%
With other couples/friends	12%	6%
With business associates	2%	6%
In a tour group	1%	<1%
Other	<1%	1%

[1]Sources: Occupancy Study and Visitor Tracking Study

TRAVEL PARTY PROFILE

Marital Status	October - December 2021	October - December 2022
Married	76%	72%
Single	24%	28%

Age	October - December 2021	October - December 2022
Average age	52	51
Median age	53	44

Household Income	October - December 2021	October - December 2022
Median Income	$110,200	$108,800

TRAVEL PARTY PROFILE

Race/Ethnicity	October - December 2021	October - December 2022
Caucasian/White	82%	71%
Hispanic/Latino/Latina/Latinx	6%	15%
African American/Black	4%	8%
Asian/Asian American/Pacific Islander	3%	3%
Middle Eastern/Northern African	-	1%
Another race/ethnicity	5%	2%

Gender[1]	October - December 2021	October - December 2022
Female	55%	44%
Male	45%	56%

[1]Gender of person interviewed.

TRIP EXPERIENCE

Length of Stay[1]	October - December 2021	October - December 2022
Average nights in the Fort Myers area	5.7	7.8

First Time/Repeat Visitors	October - December 2021	October - December 2022
First-time	29%	26%
Repeat	71%	74%

[1]Sources: Occupancy Study & Visitor Tracking Survey.
Also, 2021 data was updated to match the updated calculation method

TRIP EXPERIENCE

Type of Accommodations	October - December 2021	October - December 2022
Hotel/motel/resort	32%	39%
Friends/family home	11%	20%
Personal condo, house, timeshare, etc.	11%	18%
Vacation rental home	42%	14%
Not spending the night	3%	3%
Campground/RV Park	1%	3%
Bed & Breakfast/Inn	NA	1%
Other	<1%	2%

TRIP EXPERIENCE

Activities[1]	October - December 2021	October - December 2022
Restaurants	57%	69%
Relax and unwind	67%	61%
Shopping	38%	49%
Visit friends/relatives	31%	49%
Beach	71%	26%
Bars, nightclubs	14%	20%
Nature, environment, bird watching	30%	19%
Biking, hiking	22%	19%
Fishing	18%	18%
Golf, tennis, or pickleball	10%	17%
Water sports	23%	14%
Volunteering	1%	13%
Photography	12%	11%
Attractions	12%	10%
Culture	5%	9%
Special events	7%	8%
Museums, history	7%	8%
Special occasion	8%	8%
Spas	4%	6%
Diving, snorkeling	5%	6%
Business meetings/conferences	2%	5%
Guided tours	7%	4%
Attend or participate in a sporting event	4%	3%
Other	4%	2%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Attractions[1]	October - December 2021	October - December 2022
Miromar Outlets Mall	12%	38%
Beaches	76%	32%
Gulf Coast Town Center	9%	30%
Bell Tower Shops	10%	28%
Coconut Point Mall	10%	26%
Edison & Ford Winter Estates	14%	25%
Shell Factory and Nature Park	10%	16%
Manatee Park	4%	7%
Sanibel Outlets	19%	5%
Broadway Palm Dinner Theater	2%	5%
Barbara B. Mann Performing Arts Hall	1%	2%
Sanibel Lighthouse[2]	31%	0%
Fort Myers Beach Pier[2]	30%	0%
J.N. Ding Darling National Wildlife Refuge[2]	17%	0%
Periwinkle Place[2]	17%	0%
Bailey-Matthews Shell Museum[2]	8%	0%
Other	5%	7%
None	8%	22%

[1]Multiple responses permitted.
[2]Closed until further notice due to Hurricane Ian.

TRIP EXPERIENCE

Area stayed	October - December 2021	October - December 2022
Fort Myers	14%	48%
Cape Coral	13%	13%
Bonita Springs	5%	12%
Fort Myers Beach	24%	7%
Estero	3%	7%
North Fort Myers	1%	5%
Along I-75	1%	2%
Sanibel Island	31%	1%
Lehigh Acres	1%	1%
Boca Grande/Outer Islands	<1%	1%
Captiva Island	4%	<1%
Pine Island	<1%	<1%
None/not staying overnight	3%	3%

POST-TRIP EVALUATION

Loyalty Metrics	October - December 2021	October - December 2022
Likely to recommend	95%	87%
Likely to return	89%	85%
Likely to return next year	63%	66%

Satisfaction with Accommodations	October - December 2021	October - December 2022
Exceeded expectations	41%	36%
Met expectations	55%	61%
Did not meet expectations	4%	3%

Felt Welcomed in the Fort Myers Area	October - December 2021	October - December 2022
Yes	NA	95%

POST-TRIP EVALUATION

Satisfaction with Visit	October - December 2021	October - December 2022
Very satisfied	66%	48%
Satisfied	31%	42%
Neither	2%	8%
Dissatisfied	1%	1%
Very dissatisfied	0%	0%
Don't know/no opinion	0%	1%

Satisfaction with Customer Service	October - December 2021	October - December 2022
Very satisfied	59%	48%
Satisfied	33%	40%
Somewhat satisfied	5%	9%
Dissatisfied	1%	0%
Very dissatisfied	0%	0%
Don't know/no opinion	2%	3%

POST-TRIP EVALUATION

Visitor Concerns[1]	October - December 2021	October - December 2022
Traffic	25%	38%
High Prices	22%	15%
Insects	22%	13%
Water quality	8%	11%
Red tide	9%	10%
Weather	6%	8%
Damaged buildings, signs, and landscapes	NA	6%
Lack of nightlife	8%	4%
Beach seaweed	8%	3%
Quality of accommodations	6%	2%
Other	4%	<1%
Nothing	30%	22%

[1]Multiple responses permitted.

Methodology

METHODOLOGY

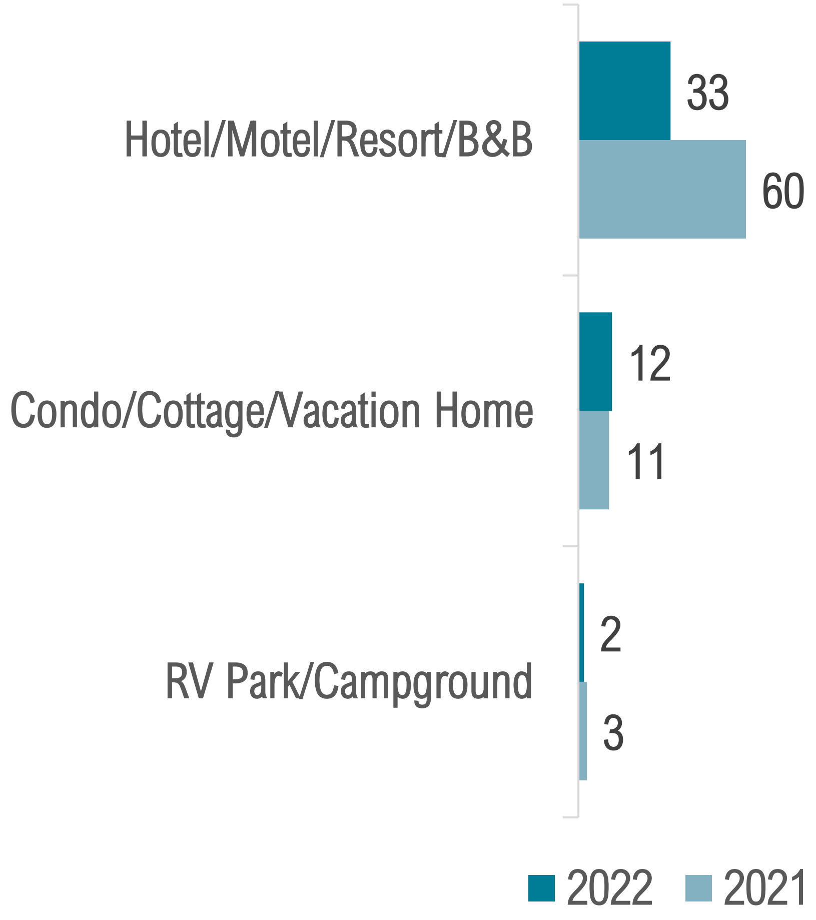
- Economic Impact of tourism in Lee County is derived from:
  - Visitor Tracking Study
    - Internet survey & in-person interviews in public areas, hotels, & at events around Lee County
    - Sample size: 602 completed interviews[1]
    - Target individuals: October - December visitors to Lee County
    - Data Collection: October – December 2022
  - Occupancy Study
    - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc., as well as data from STR and KeyData reports
    - Sample Size – data from 5,618 hotel/rental/campground units (47 properties) reporting to DSG, 8,856 hotel units reporting to STR (90 properties), and 2,819 rental units (26 properties) reporting to KeyData
  - 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

[1]No visitor interviews were completed during the month of October.

METHODOLOGY

- Occupancy Study
  - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc.
    - Sample Size – 47 completed interviews
    - Data Collection: Completed in Jan 2022 (for October - December 2022)
  - Total Sample Size – data from 5,618 hotel/rental/campground units reporting to DSG, 8,856 hotel units reporting to STR (representing 90 properties), and 2,819 rental units reporting to KeyData (representing 26 properties)

Number of Interviews



Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

October - December 2022

Visitor Tracking, Occupancy, & Economic Impact Study

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ISLANDS, BEACHES & NEIGHBORHOODS

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