Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

Calendar Year 2022

Visitor Tracking, Occupancy & Economic Impact Study

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

ANNUAL SNAPSHOT

- Although visitation decreased 5.4% compared to 2021, direct spending and economic impact increased 10.9%. This was caused by increases in inflation and ADR, a decrease in travel party size, as well as the ongoing post-pandemic trend of U.S. households spending larger portions of their discretionary income on travel.
- The Fort Myers area also experienced more competition in 2022. The share of visitors who considered other destinations prior to their visit increased from 26% in 2021 to 37% in 2022.
- Compared to 2021, recall of Lee County promotions increased from 38% to 48% in 2022 and 26% of all visitors said the promotions they saw directly influenced their decision to visit Lee County.

67.2%	$182.64	$122.69
OCCUPANCY RATE	**AVERAGE DAILY RATE**	**REVENUE PER ROOM**
↓ 3.4% from 2021	↑ 15.2% from 2021	↑ 11.3% from 2021

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

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

DIRECT SPENDING

Visitors who traveled to the Fort Myers area in CY 2022 spent

$4,138,350,100

in Lee County on accommodations, restaurants, groceries, transportation, attractions, entertainment, and shopping.

An increase of **10.9%.**

TOURISM MATTERS TO LEE COUNTY

Visitor spending in CY 2022 generated a total economic impact of

$6,592,391,700

in the Fort Myers area.

An increase of **10.9%.**

VISITORS

The Fort Myers area attracted

4,436,000

visitors in CY 2022.

A decrease of **5.4%.**

ROOM NIGHTS

The Fort Myers area visitors generated

6,270,500

room nights in paid accommodations in CY 2022.

A decrease of **1.9%.**

TOURIST DEVELOPMENT TAX

Paid accommodations and vacation rentals by visitors to the Fort Myers area in CY 2022 generated

$60,902,400

in TDT collected

An increase of **5.9%.**

JOBS & WAGES

Tourism in the Fort Myers area supported

73,564 (+6.3%)

local jobs in CY 2022, generating

$2,049,290,100 (+11.1%)

in wages and salaries.

VISITORS SUPPORT JOBS

An additional Lee County job
is supported by every

60

visitors

HOUSEHOLD SAVINGS[1]

Visitors to the Fort Myers area
save local residents

$2,176

per household every year
in state and local taxes

CALENDAR YEAR LODGING STATISTICS

67.2%	$182.64	$122.69
Occupancy	ADR	RevPAR
↓ 3.4%	↑ 15.2%	↑ 11.3%

VISITOR JOURNEY: PRE-VISIT

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

TRIP PLANNING

→ Nearly half of visitors planned their trip to the Fort Myers area 3 months or more in advance

→ Nearly half of visitors requested information from local organizations to plan their trips

  → Nearly 1 in 3 visitors called a hotel, motel, or condo when planning their trips

→ 37% of visitors considered choosing other destinations when planning their trips

TRIP PLANNING: TOP WEBSITES USED

- Over 4 in 5 visitors used online sources to plan their trips to the Fort Myers area
- Top online sources used to plan their trips include[1]:

33% Search engines

27% Airline websites

VRBO® from HomeAway®

24% Airbnb, VRBO, HomeAway, or similar website

[1]Multiple responses permitted.

TOP TRIP INFLUENCERS

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

92% Warm weather

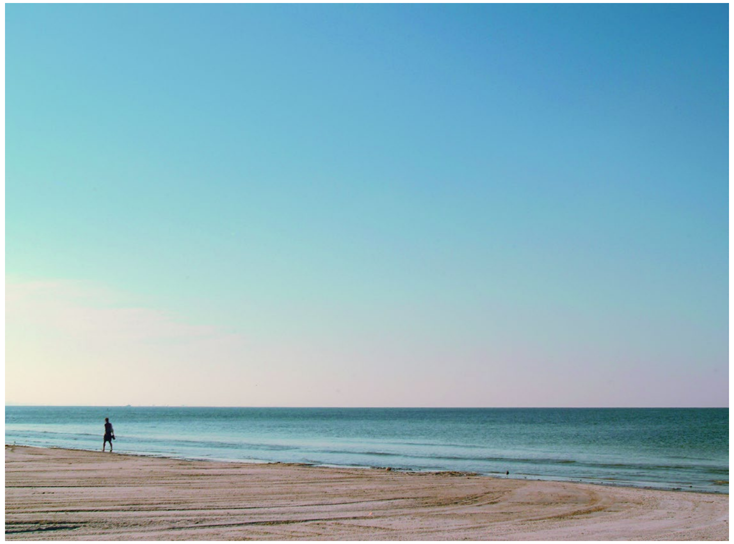
92% Peaceful/relaxing

89% Safe destination

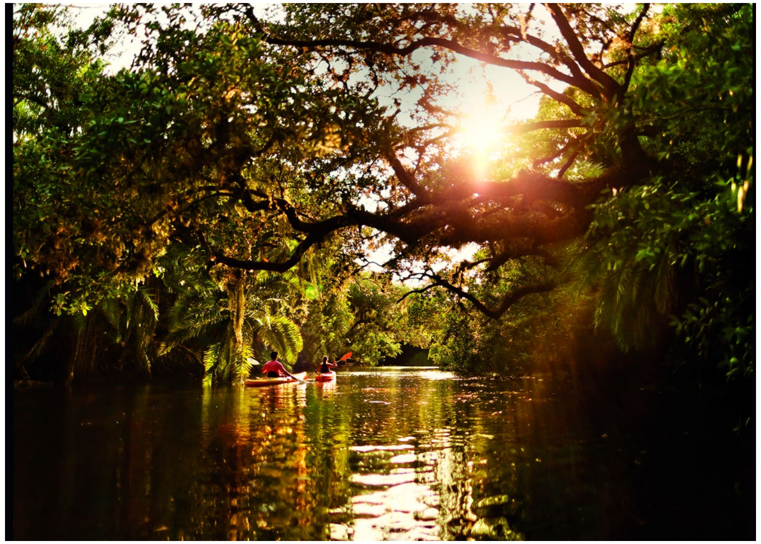
[1]Top 2 box scores. Attributes rated on a scale from 1 to 5 where 1 is Not at All Influential and 5 is Definitely Influential.

TOP REASONS FOR VISITING

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



51% Beach



38% Relax & unwind

20% Visiting friends/relatives

[1]Three responses permitted.

PROMOTIONS

- 48% of visitors **recalled promotions** in the past 6 months for the Fort Myers area
- **Promotions influenced 26%** of all visitors to come to the Fort Myers area
- Top sources of recall include[1]:

50%[2] Internet

34%[2] Social media

[1] Multiple responses permitted.
[2] Base = 48%.

BOOKING

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

41% Directly with hotel/condo

18% Other online travel agency

17% VRBO, HomeAway

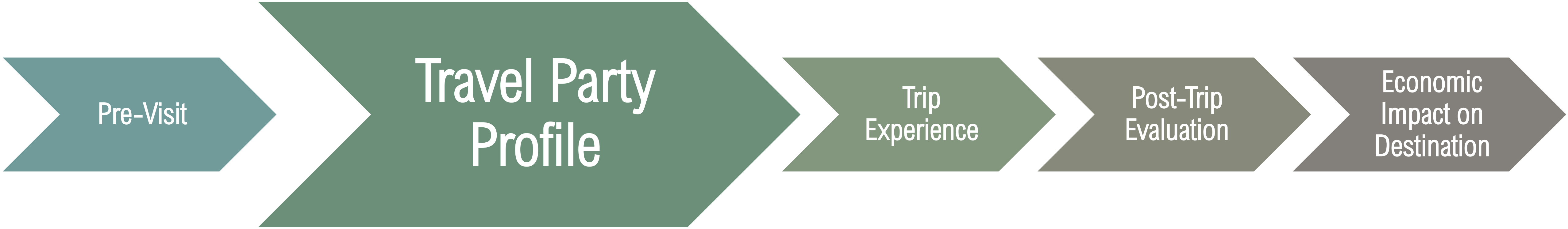
11% Airbnb

9% Vacation rental company

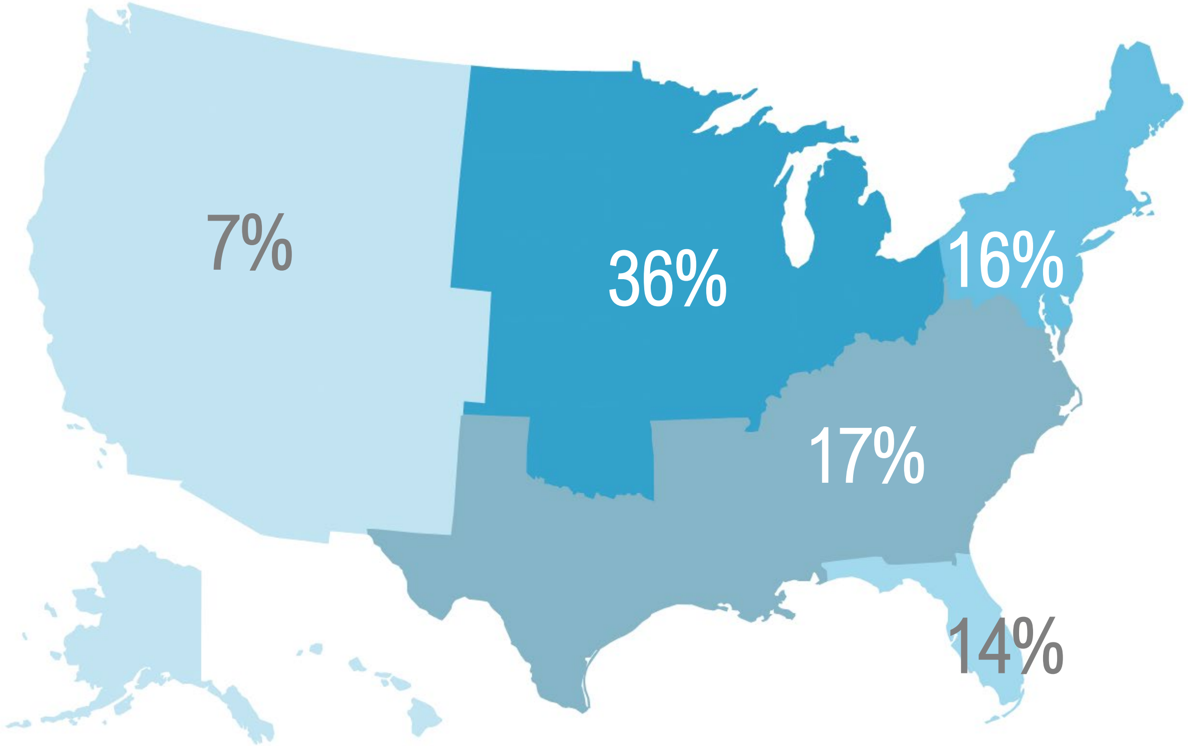
TRANSPORTATION

- **70%** of visitors **flew** to the Fort Myers area
- **58%** of all visitors traveled to the Fort Myers area via **RSW**

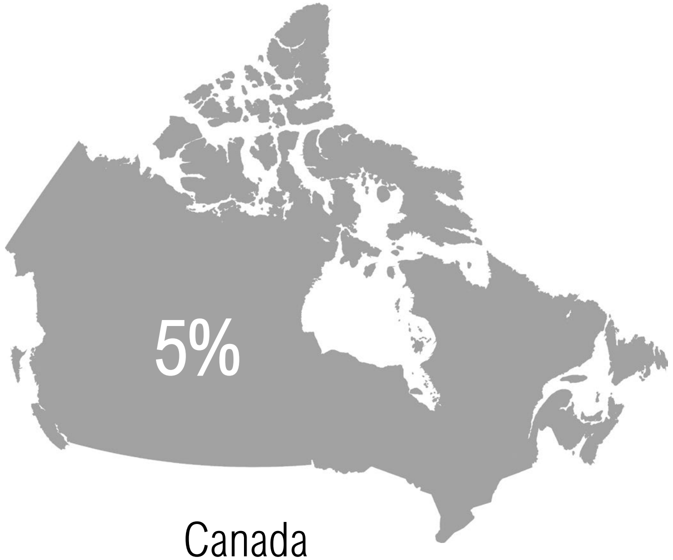
VISITOR JOURNEY: TRAVEL PARTY PROFILE



ORIGIN



US = 90%



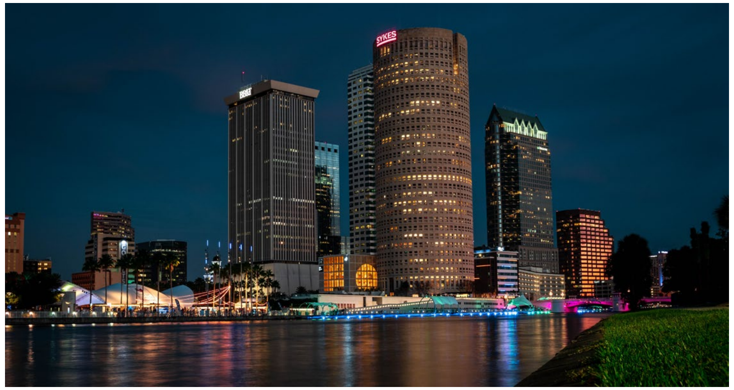
Canada

Other International = 5%

[1]Sources: Data from Visitor Tracking Survey and Arrivalist

TOP ORIGIN MARKETS[1]

5% Miami-Ft Lauderdale



4% Tampa-St Petersburg

4% Chicago

4% New York

[1]Sources: Data from Visitor Tracking Survey and Arrivalist

TRAVEL PARTY SIZE AND COMPOSITION

- Visitors traveled in a party composed of 3.2 people[1]
- 40% traveled with children under the age of 18
- 47% traveled as a family

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

DEMOGRAPHIC PROFILE

CY 2022 Visitors:

- Median age of 50 years old
- Median household income of $109,600
- Married (71%)
- College educated (69%)
- Caucasian/white (79%)

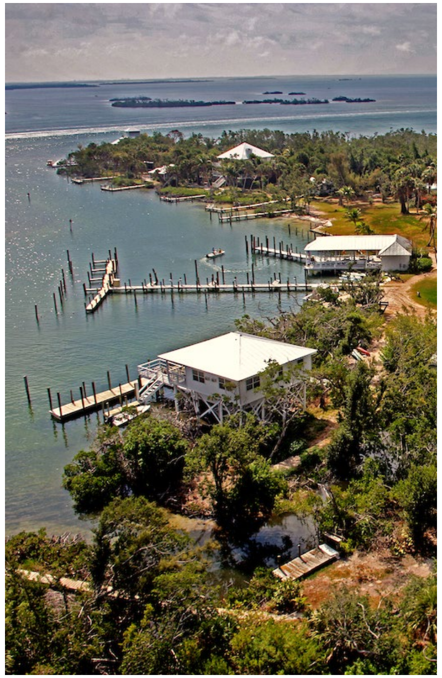
Visitor Journey: Trip Experience

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

ACCOMMODATIONS

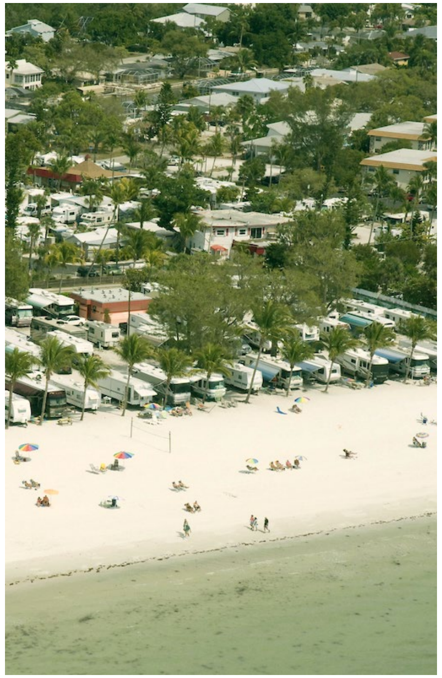
35% Condo/Vacation Rental

35% Hotel/Motel/Resort/B&B



25% Non-paid Accommodations

3% Day trippers



2% RV Park/Campground

LENGTH OF STAY & NUMBER OF TIMES IN DESTINATION

- Visitors[1] spent 6.6 nights in the Fort Myers area
- 36% were first time visitors
- 17% have visited more than 10 times

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

VISITOR ACTIVITIES

- Top visitor activities include[1]:

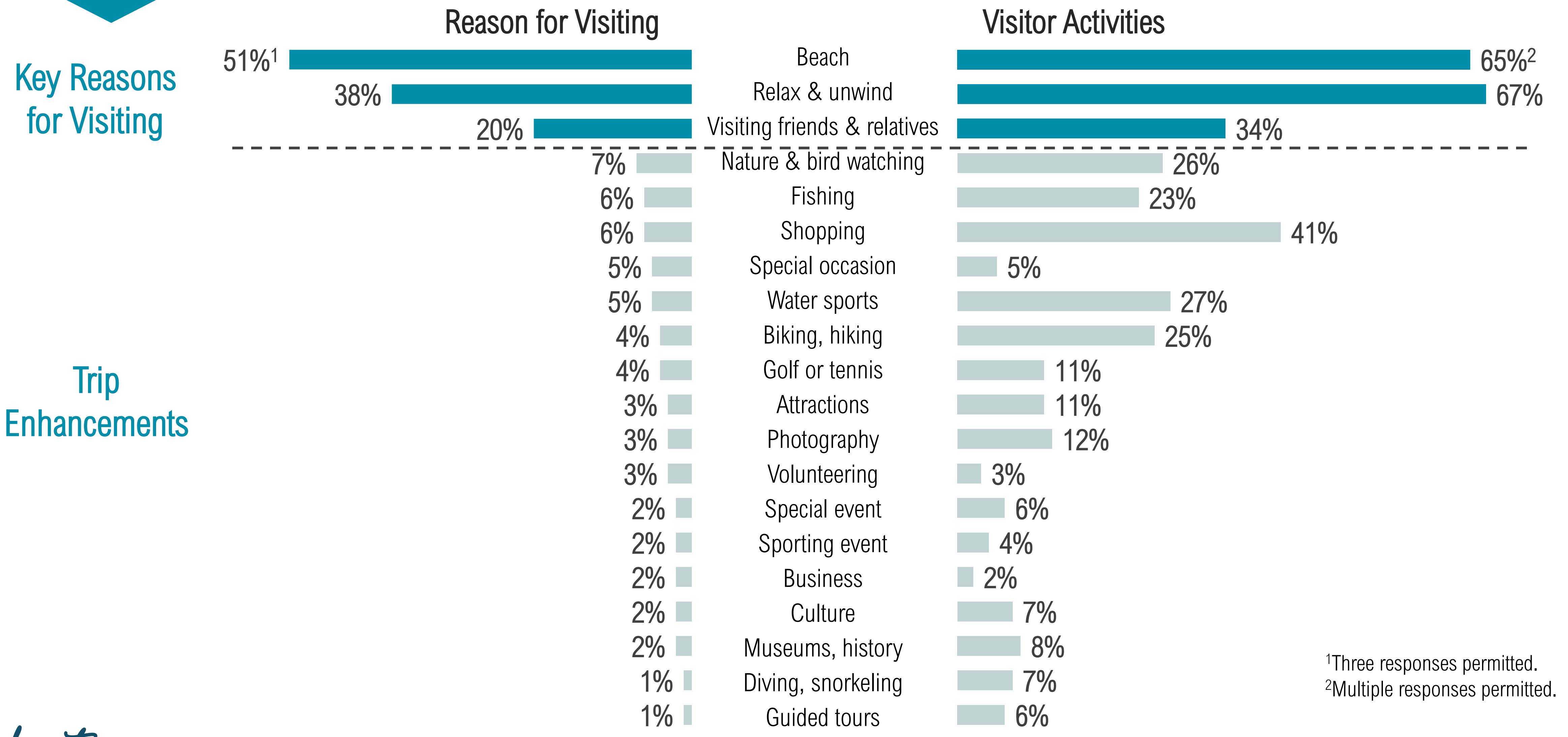
67% Relax & unwind

65% Beaches

56% Dining

[1]Multiple responses permitted.

REASON FOR VISITING VS. VISITOR ACTIVITIES



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

TOP COMMUNITIES STAYED

25% Fort Myers Beach

21% Sanibel Island

20% Fort Myers

13% Cape Coral

VISITOR JOURNEY: POST-TRIP EVALUATION

SATISFACTION

- 93% of visitors are likely to recommend the Fort Myers area
- 88% of visitors are likely to return
- 59% of visitors are likely to return next year

SATISFACTION

- 95% of visitors were satisfied or very satisfied with their overall visit to the Fort Myers area (56% were very satisfied)
- 92% of visitors were satisfied or very satisfied with customer service on their visit (54% were very satisfied)
- 36% of visitors said paid accommodations exceeded their expectations (95% met or exceeded expectations)

TOP ATTRIBUTE RATINGS

→Visitors gave the highest ratings to the following destination attributes[1] of the Fort Myers area:

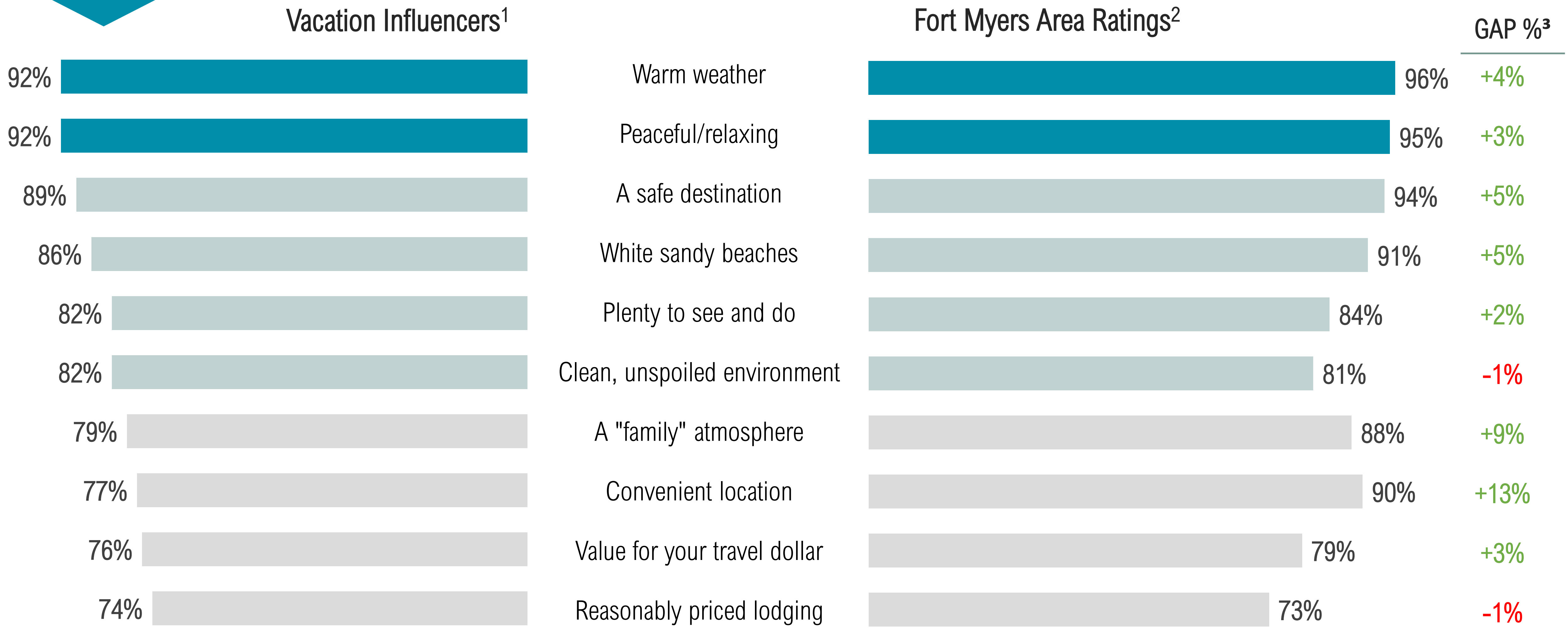
96% Warm weather

95% Peaceful/relaxing

94% A safe destination

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

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.
[3]Gap is the difference between Fort Myers Area Ratings and the score for Vacation Influencers. A positive GAP is preferred.

VISITOR CONCERNS

- Over 1 in 3 visitors were concerned about traffic in the Fort Myers area
- Over 1 in 5 were concerned about high prices
- 24% of visitors had no concerns about the destination

AREA DESCRIPTIONS

Warm Weather

"Favorite vacation of the year. Perfect warm weather, gorgeous beaches, and great restaurants. I'd recommend it to anyone."

Peaceful & Relaxing

"It's so relaxing. People who live here must feel like they're on permanent vacation."

Safe Destination

"Nice vacation for the family. It has a lot to see and do, it's a very safe environment with great beaches, and there's good golfing options."

Detailed Findings

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

TOURISM SNAPSHOT: CALENDAR YEAR 2022[1]

Visitor & Lodging Statistics	2021	2022	% Change
Visitors	4,687,500	4,436,000	- 5.4%
Visitor Days[2]	27,818,100	28,284,000	+ 1.7%
Room Nights	6,394,800	6,270,500	- 1.9%
Direct Expenditures[3]	$3,729,946,900	$4,138,350,100	+10.9%
Total Economic Impact[4]	$5,945,535,400	$6,592,391,700	+ 10.9%
TDT	$57,528,800	$60,902,400	+ 5.9%

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

[2] Visitor Days reflect the total amount of days that visitors spent in the destination including all visitor types and not just those who stayed in paid accommodations.

[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.

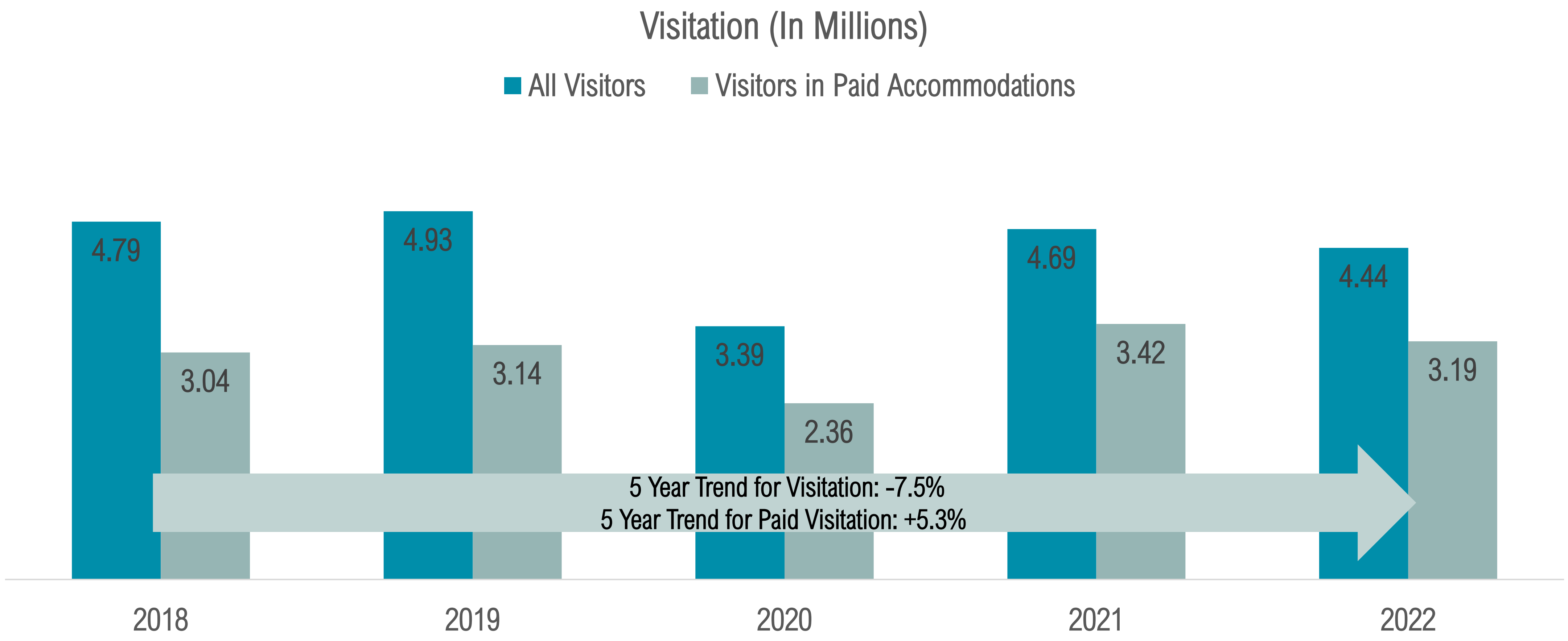
[4] The IMPLAN multiplier used to estimate economic impact is 1.594.

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM

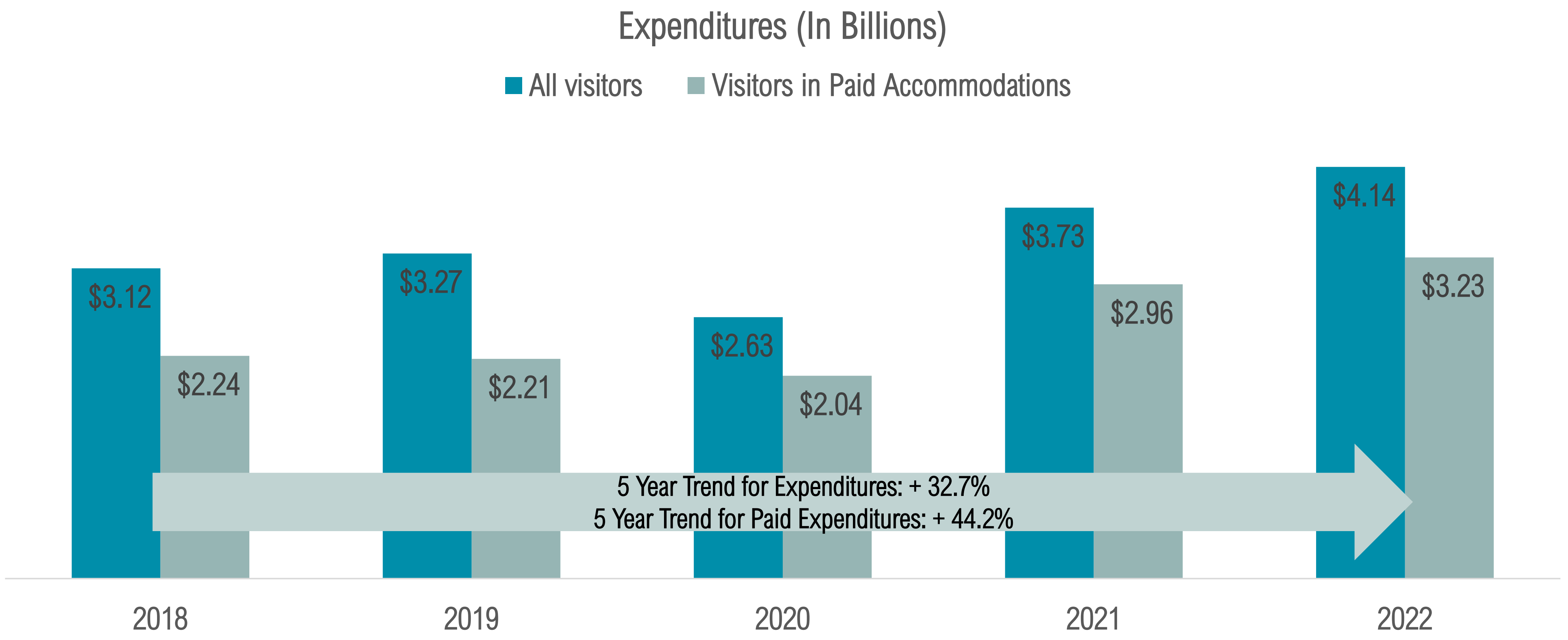
	2021	2022	% Change
Direct Jobs	50,133	53,330	+ 6.4%
Total Jobs[1]	69,174	73,564	+ 6.4%
Direct Wages	$1,122,994,700	$1,229,254,000	+ 9.5%
Total Wages[1]	$1,844,217,000	$2,049,290,100	+11.1%
Visitors per Job Supported	68	60	
Household Savings on Taxes	$2,139	$2,176	

[1]"Total wages" and "total taxes" are greater than "direct wages" and "direct taxes" because visitors direct spending is recirculated throughout the Lee County economy as employees and employers buy products and services with visitors' dollars.

5 YEAR TREND: VISITATION



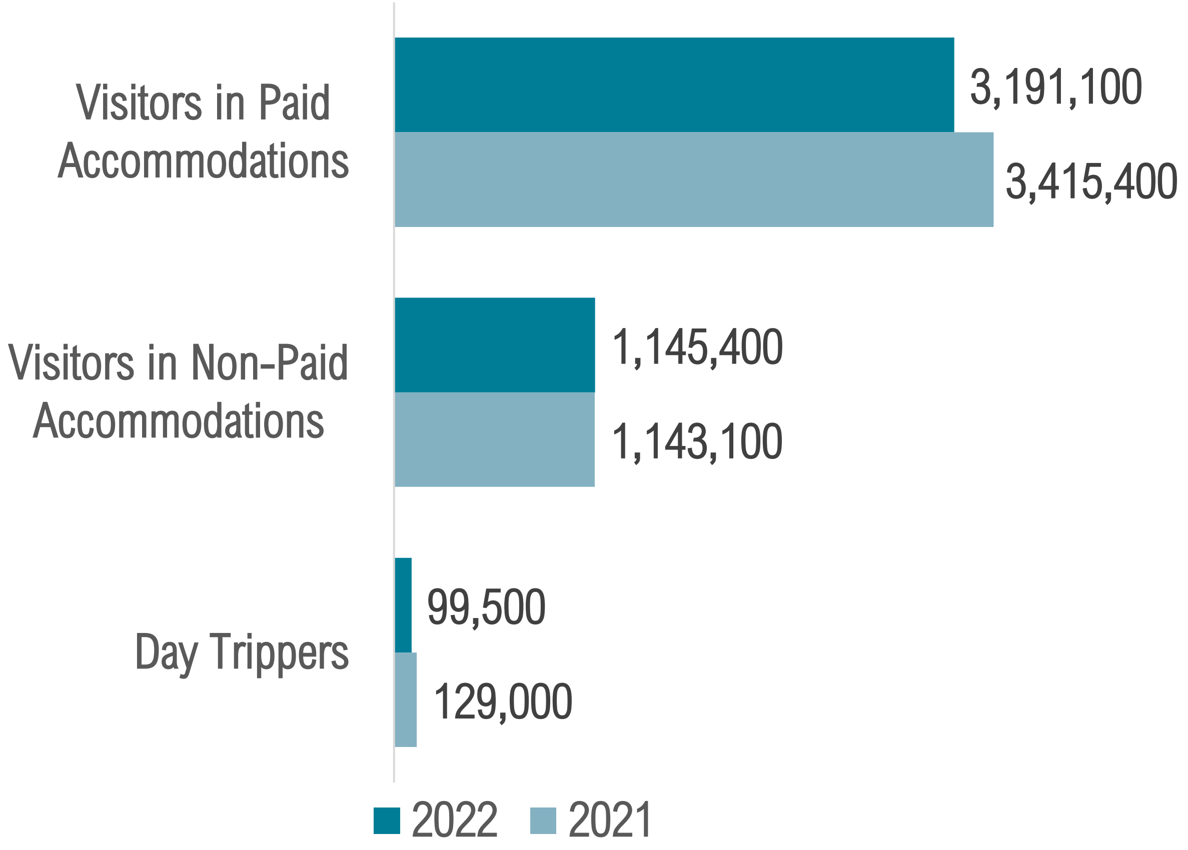
5 YEAR TREND: VISITOR SPENDING[1]



[1]Note: Cumulative inflation during the same five-year period was nearly 20%, most of which occurred during 2021 and 2022.

NUMBER OF VISITORS

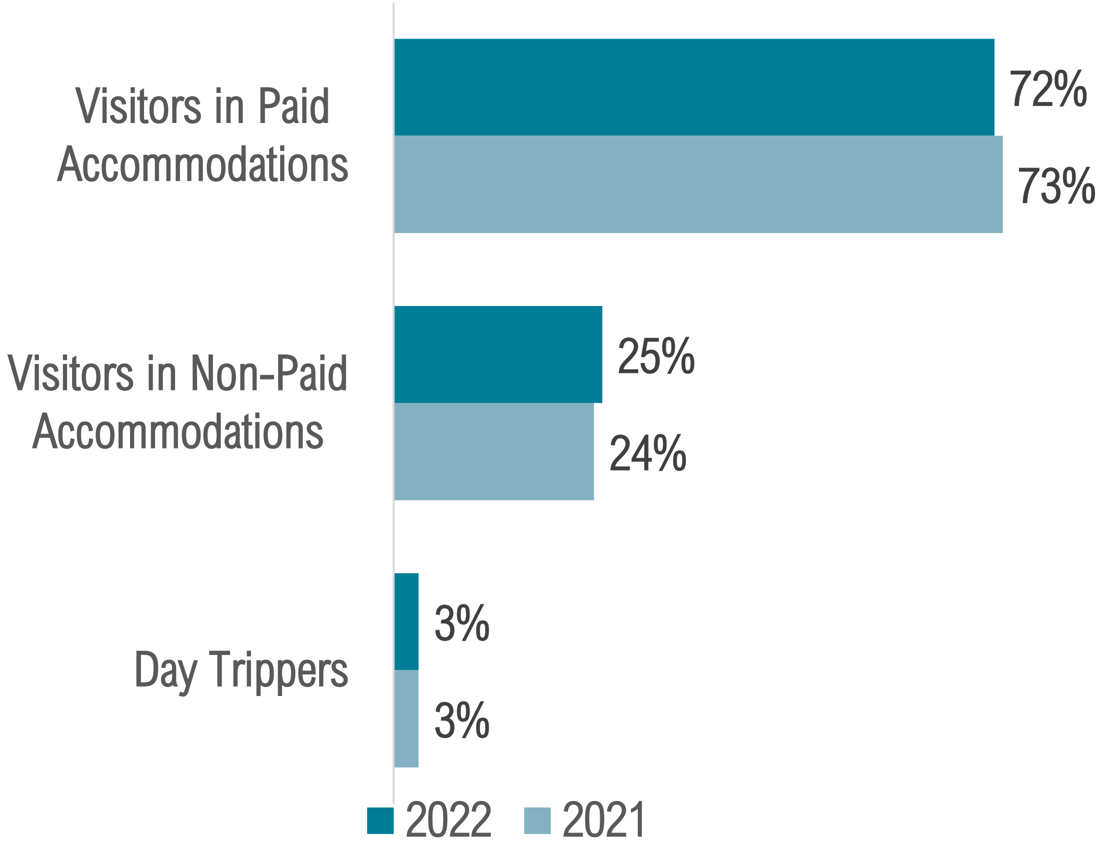
There were **4,436,000[1] visitors** to the Fort Myers area in 2022 (-5.4% from 2021).



[1]Sources: Visitor Tracking Study & Occupancy Survey

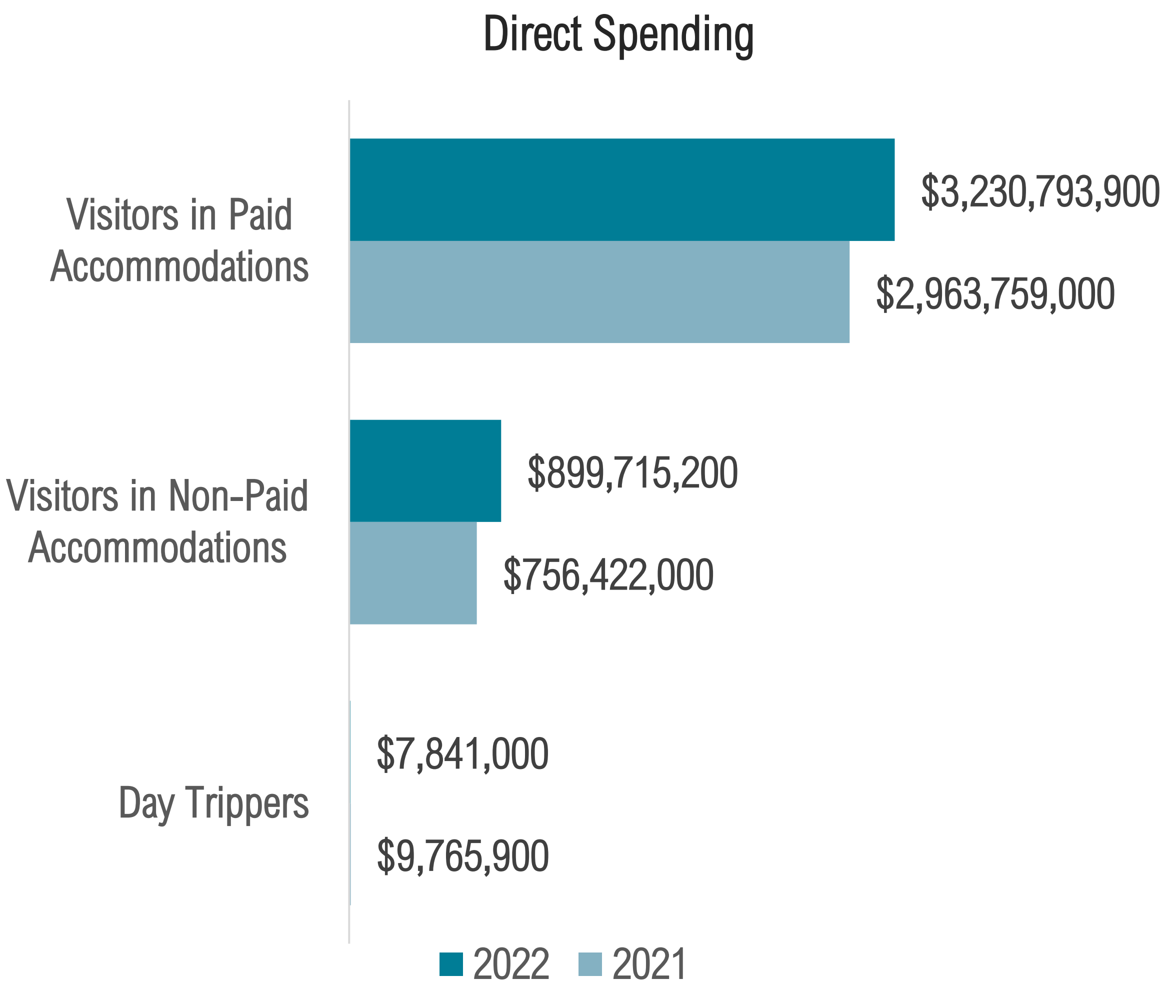
VISITOR TYPE

Visitors staying in **paid accommodations** accounted for **7 in 10** visitors.



VISITOR EXPENDITURES BY VISITOR TYPE

2022 visitors spent $4,138,350,100 in the Fort Myers area, resulting in a total economic impact of $6,592,391,700, up 10.9% from 2021.

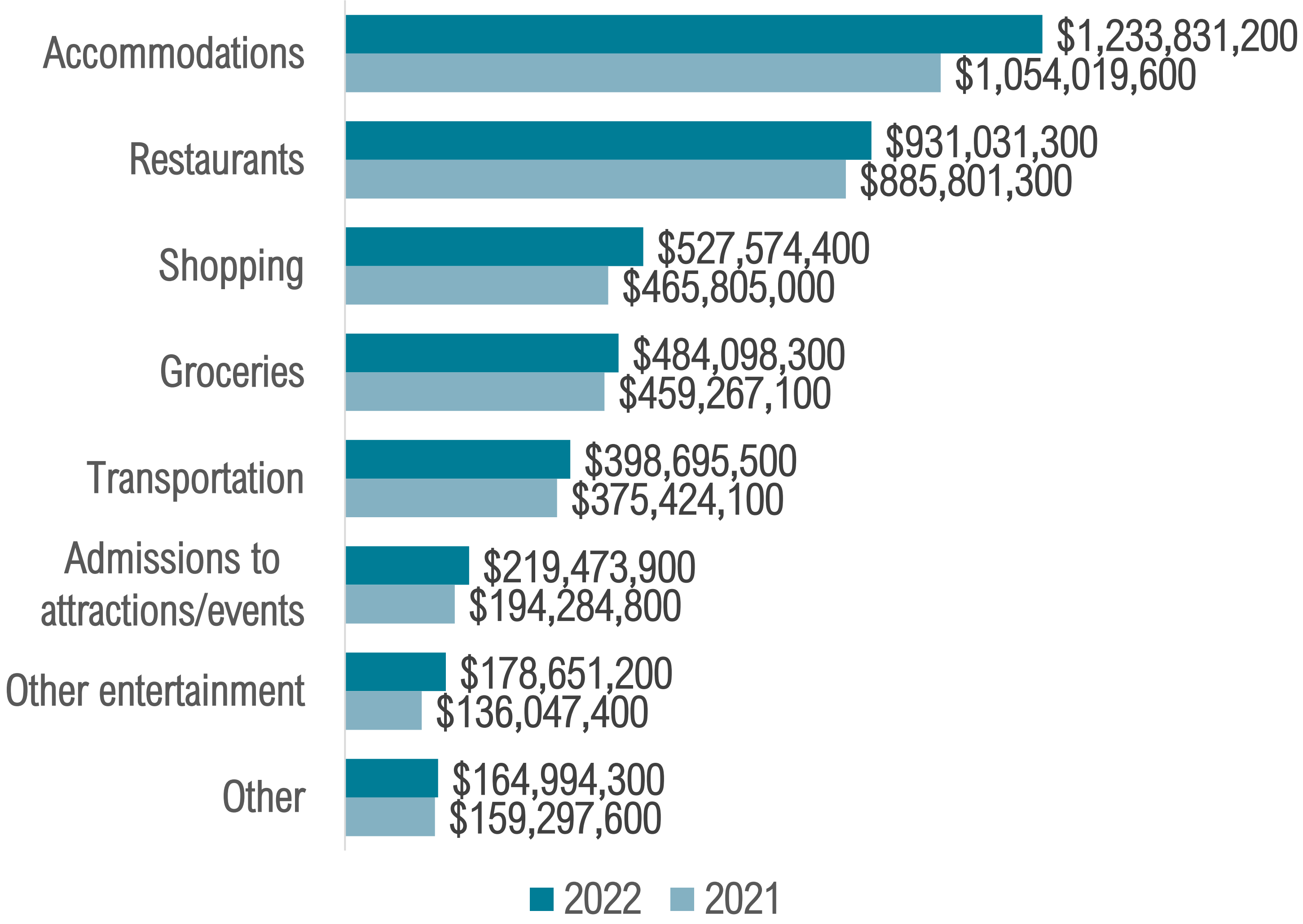


fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

downs & st. germain RESEARCH

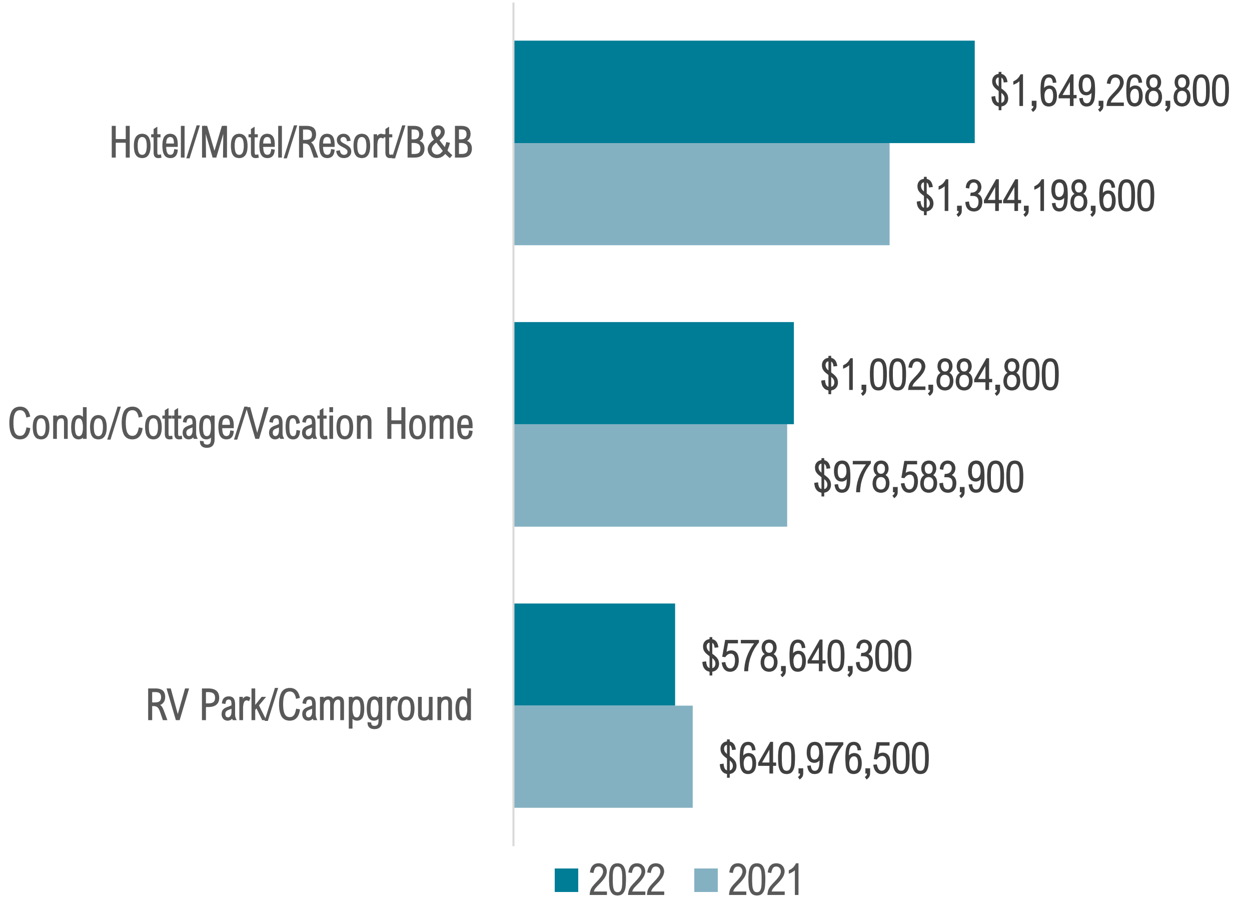
VISITOR EXPENDITURES BY SPENDING CATEGORY

Visitor spending on accommodations accounted for 30% of total visitor spending in 2022.



VISITOR EXPENDITURES BY LODGING TYPE

2022 visitors staying in **paid accommodations** spent **$3,230,793,900** in the Fort Myers area.



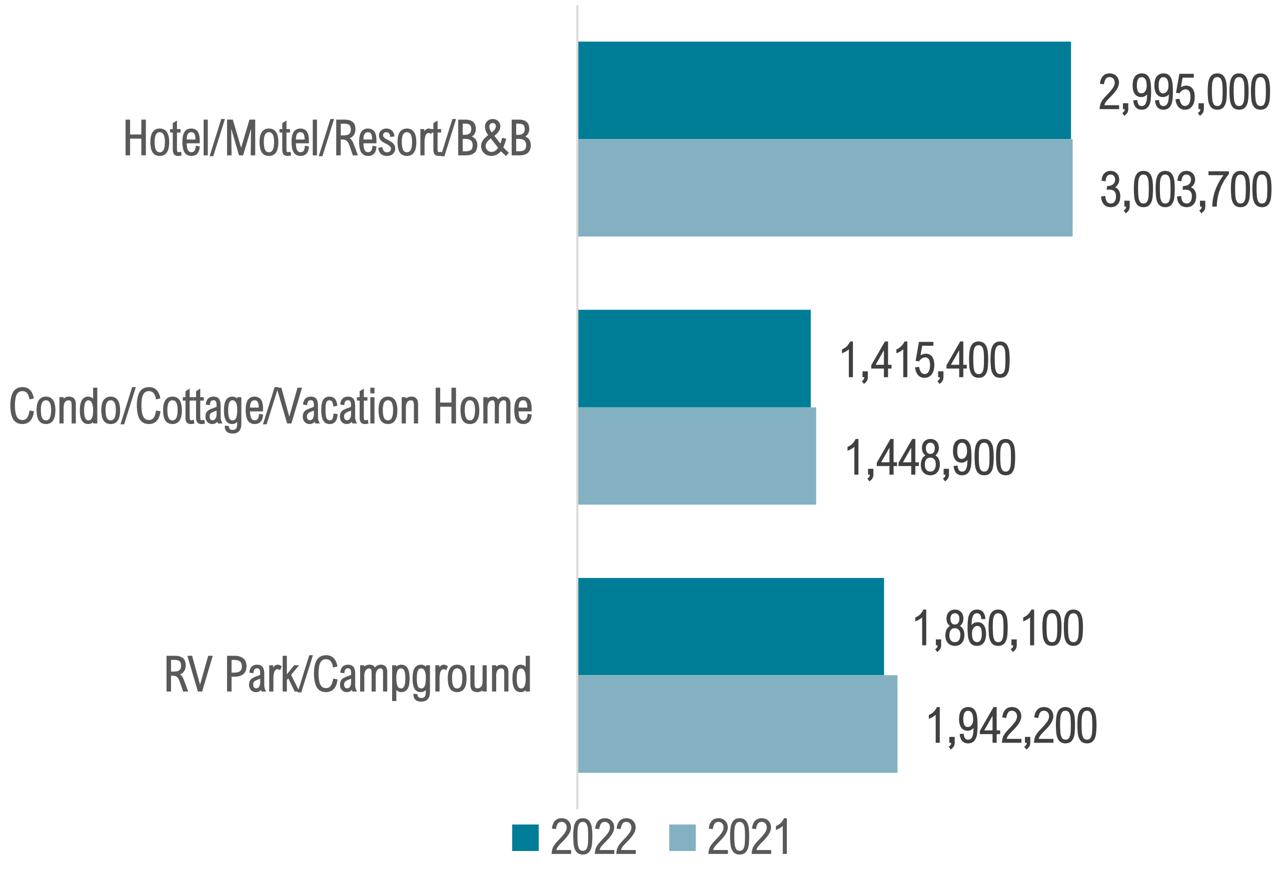
ROOM NIGHTS GENERATED

2022 visitors spent **6,270,500[1] nights** in the Fort Myers area. (-1.9% from 2021).

[1]Source: Occupancy Survey

ROOM NIGHTS GENERATED

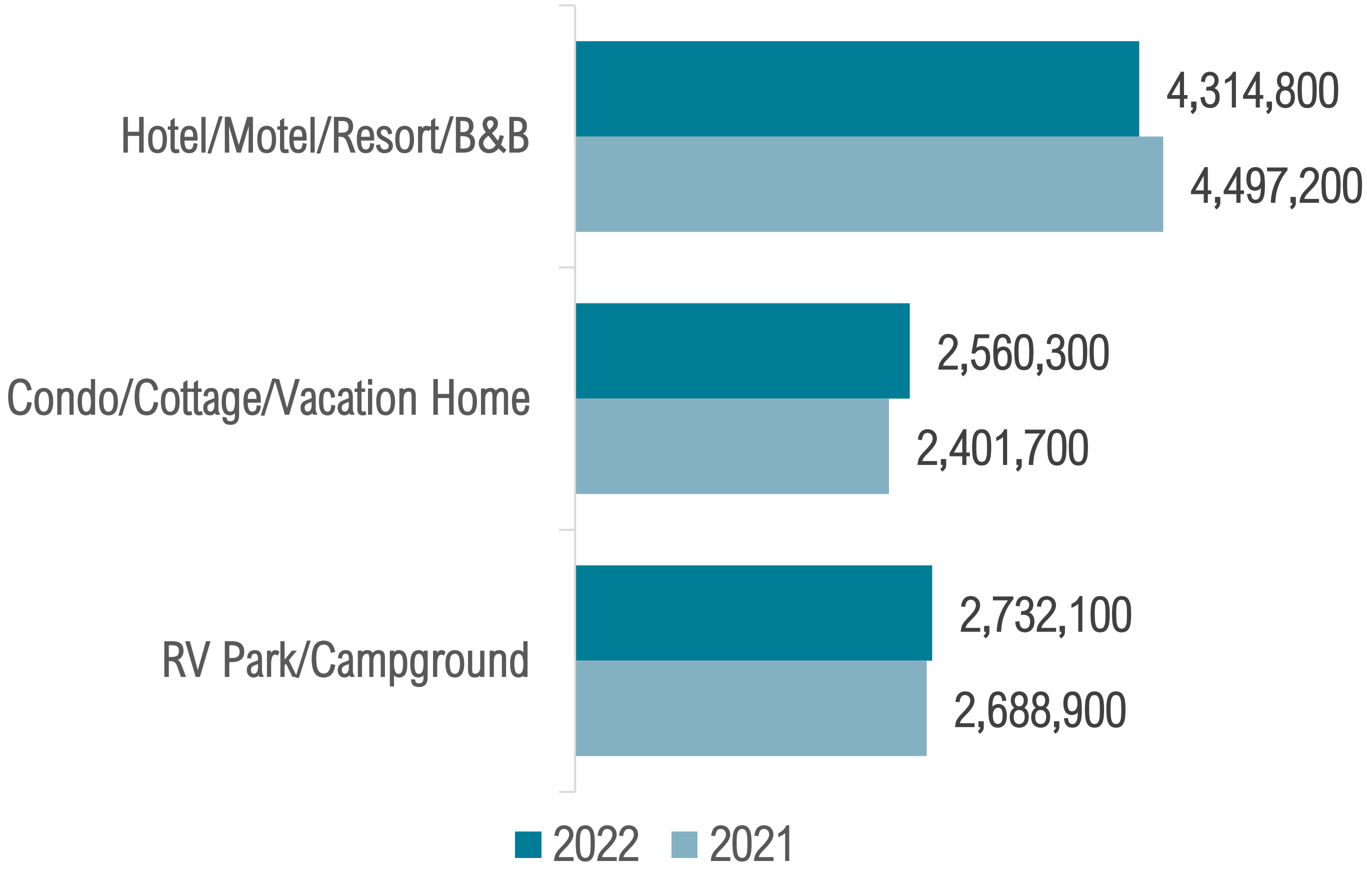
Hotels, motels, etc. accounted for nearly half of the room nights generated in the Fort Myers area, while RV Parks/Campgrounds accounted for 3 in 10 nights visitors spent in the area.



[1]Source: Occupancy Survey

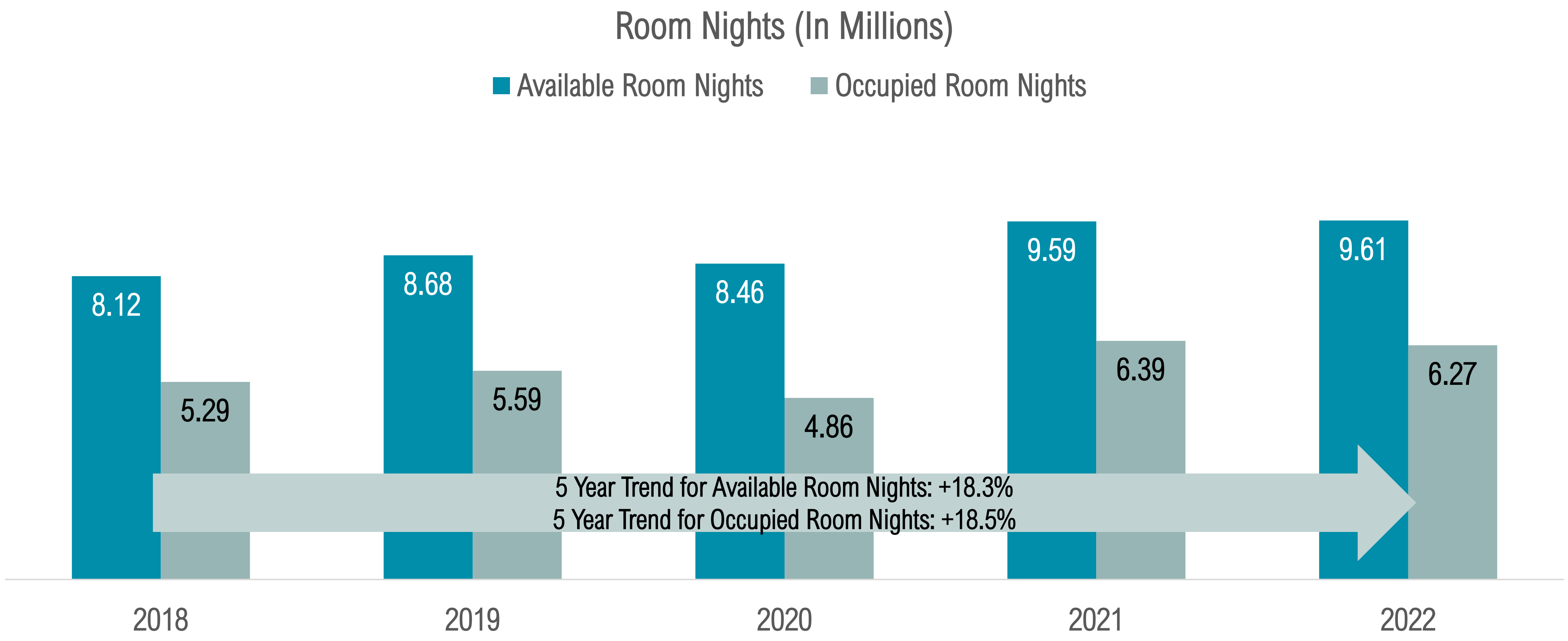
AVAILABLE ROOM NIGHTS

There were **9,607,200[1] available room nights** in 2022 vs. 9,587,800 in 2021 (+1.6%).

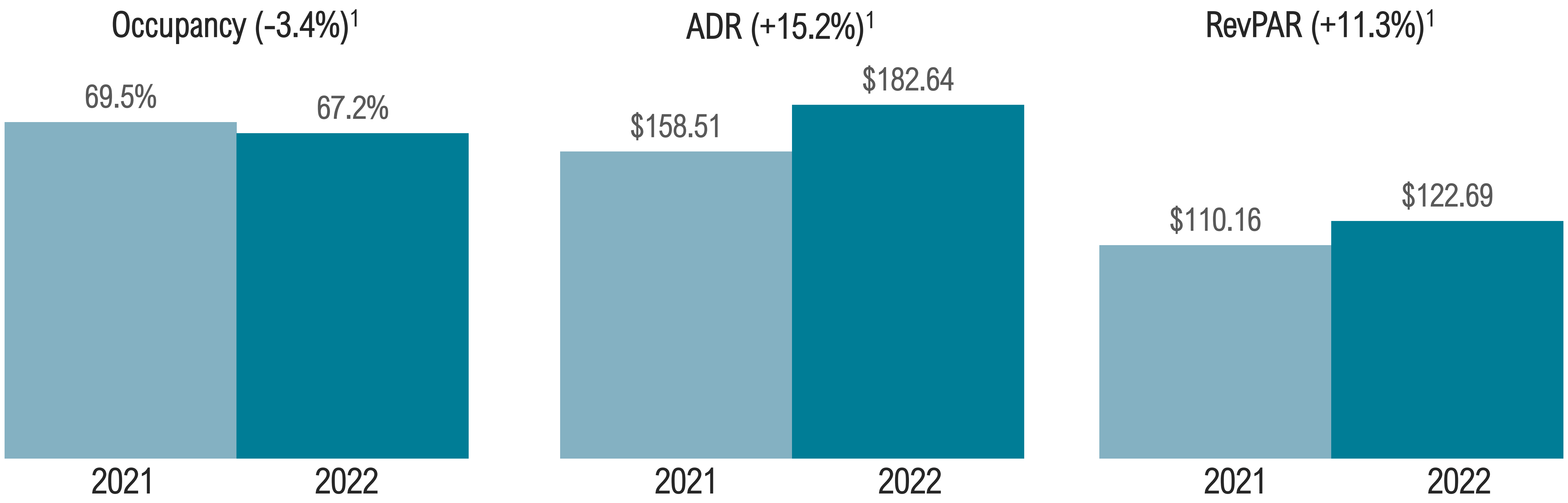


[1]Source: Occupancy Survey

5 YEAR TREND: AVAILABLE & OCCUPIED ROOM NIGHTS



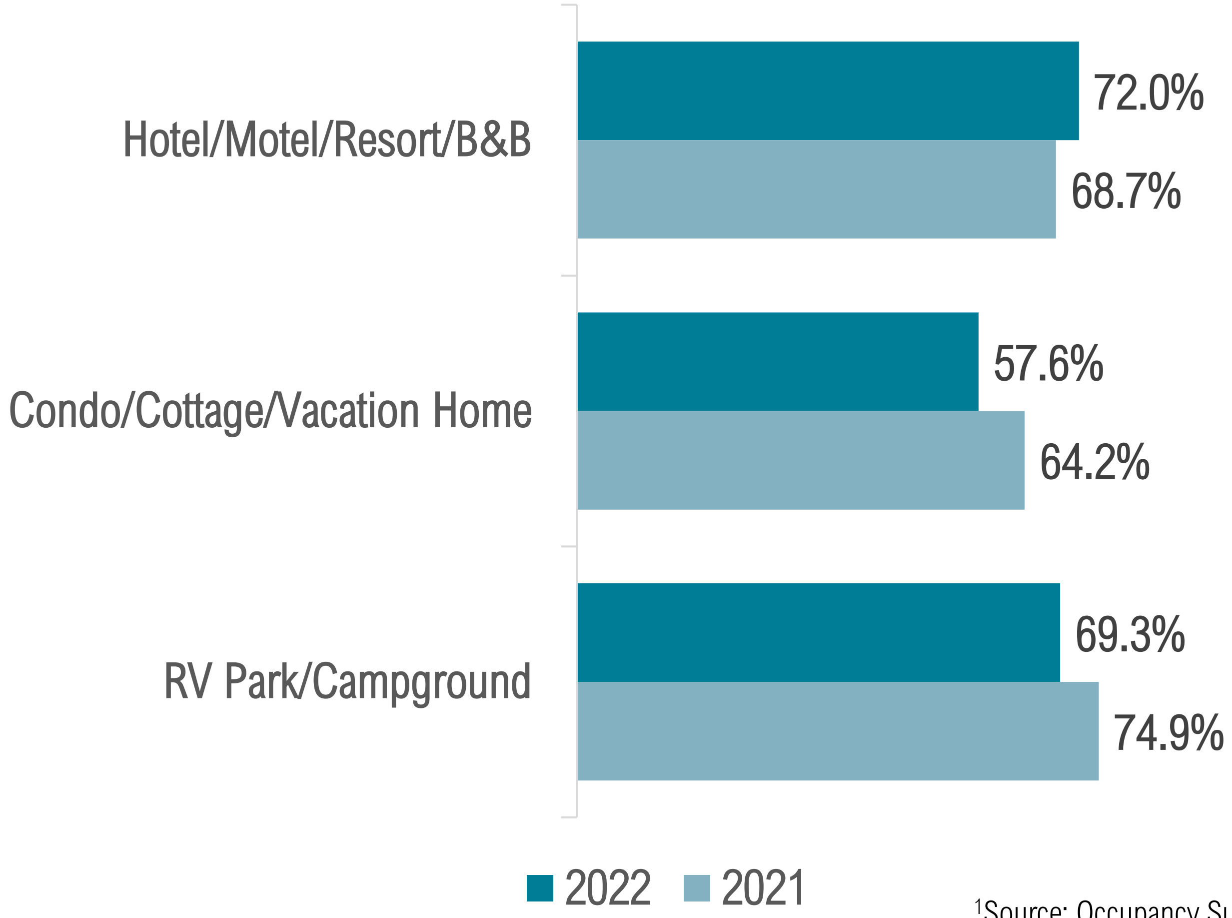
OCCUPANCY, ADR AND REVPAR



[1]Source: Occupancy Survey

OCCUPANCY

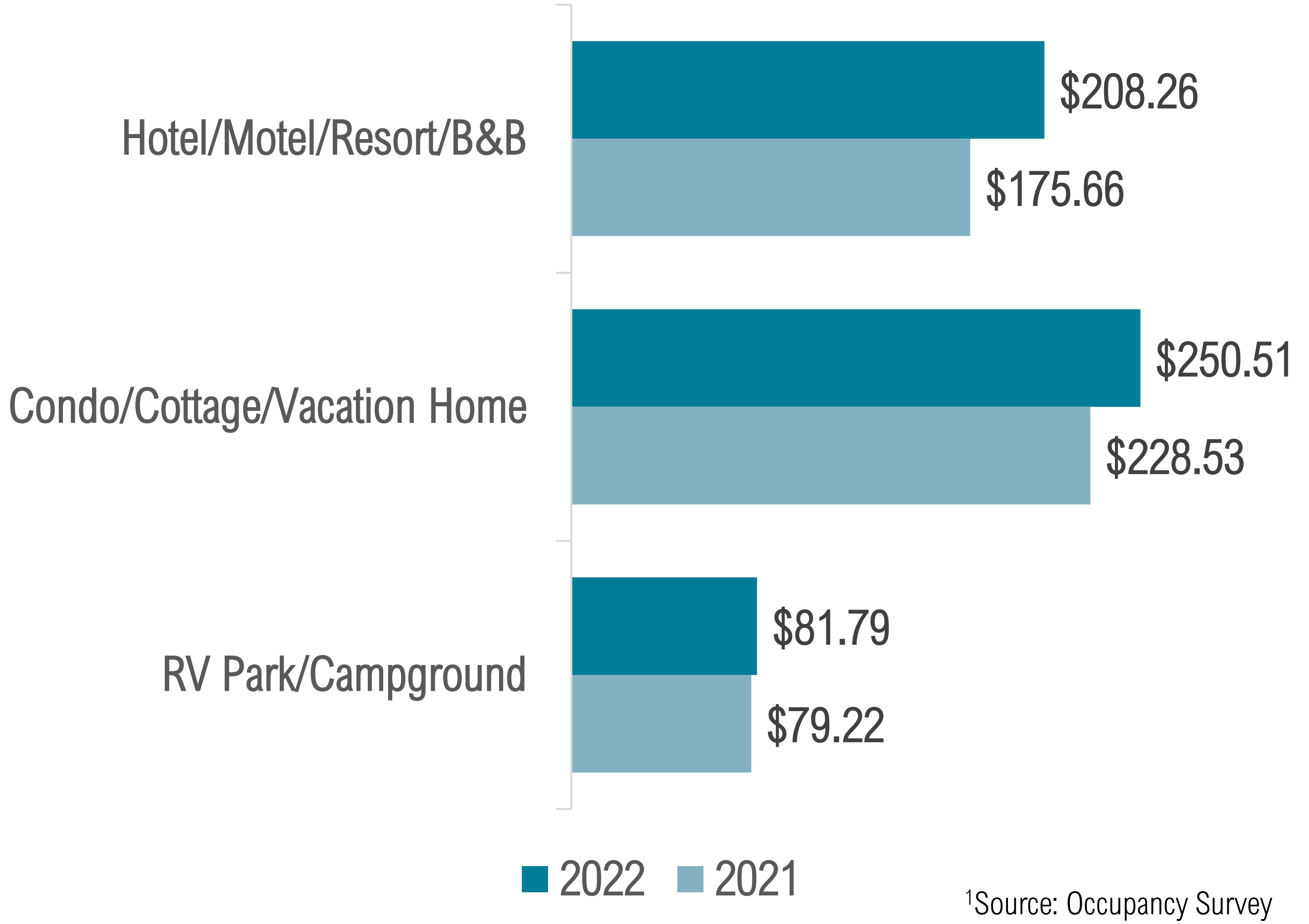
Average **occupancy** in 2022 was **67.2%**[1] (69.5% in 2021).



[1]Source: Occupancy Survey

ADR

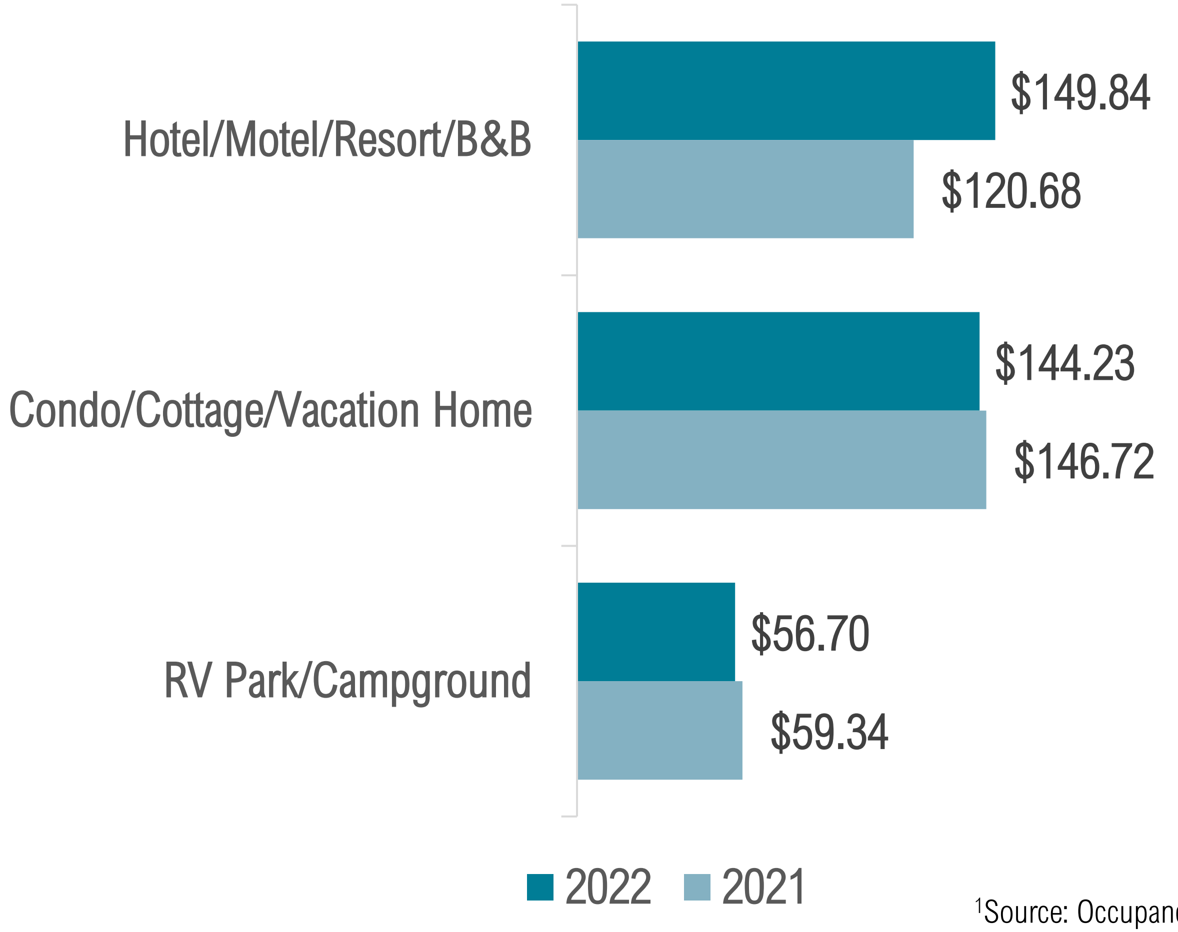
ADR in 2022 was $182.64[1] ($158.51 in 2021).



[1]Source: Occupancy Survey

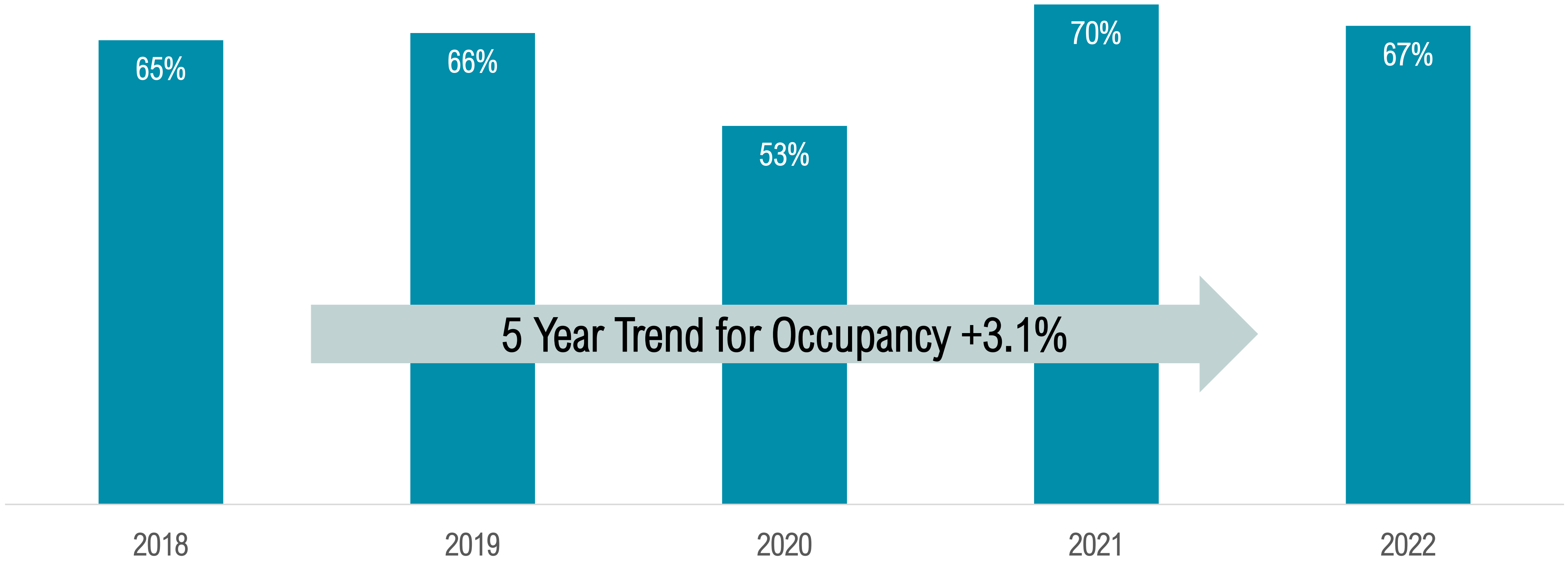
REVPAR

Average RevPAR in 2022 was $122.69[1] ($110.16 in 2021).

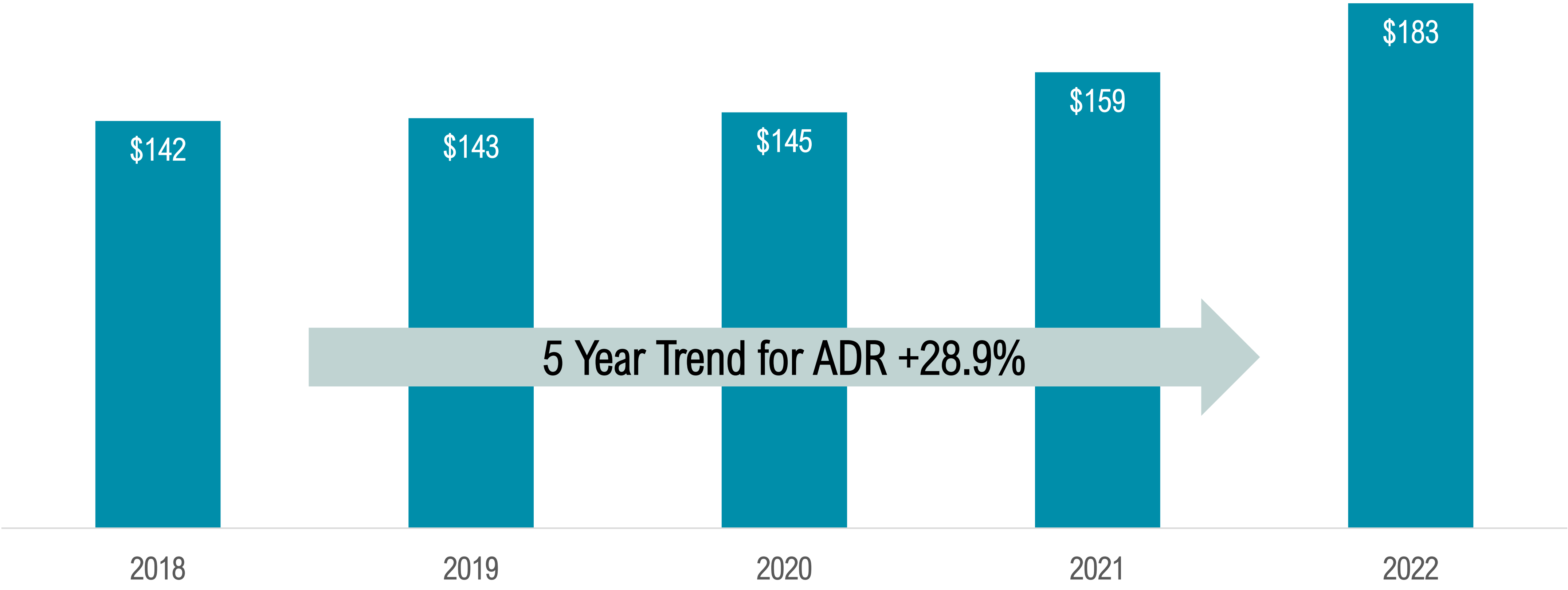


[1]Source: Occupancy Survey

5 YEAR TREND: OCCUPANCY

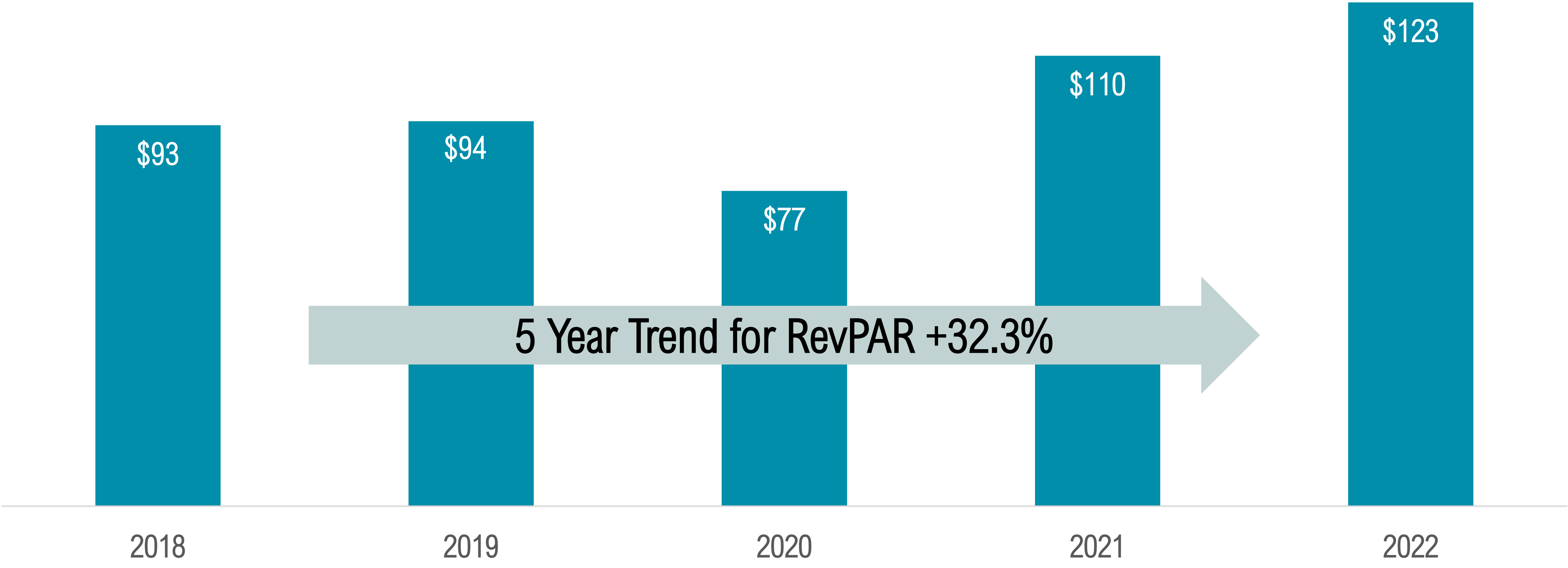


5 YEAR TREND: ADR[1]



[1]Note: Cumulative inflation during the same five-year period was nearly 20%, most of which occurred during 2021 and 2022.

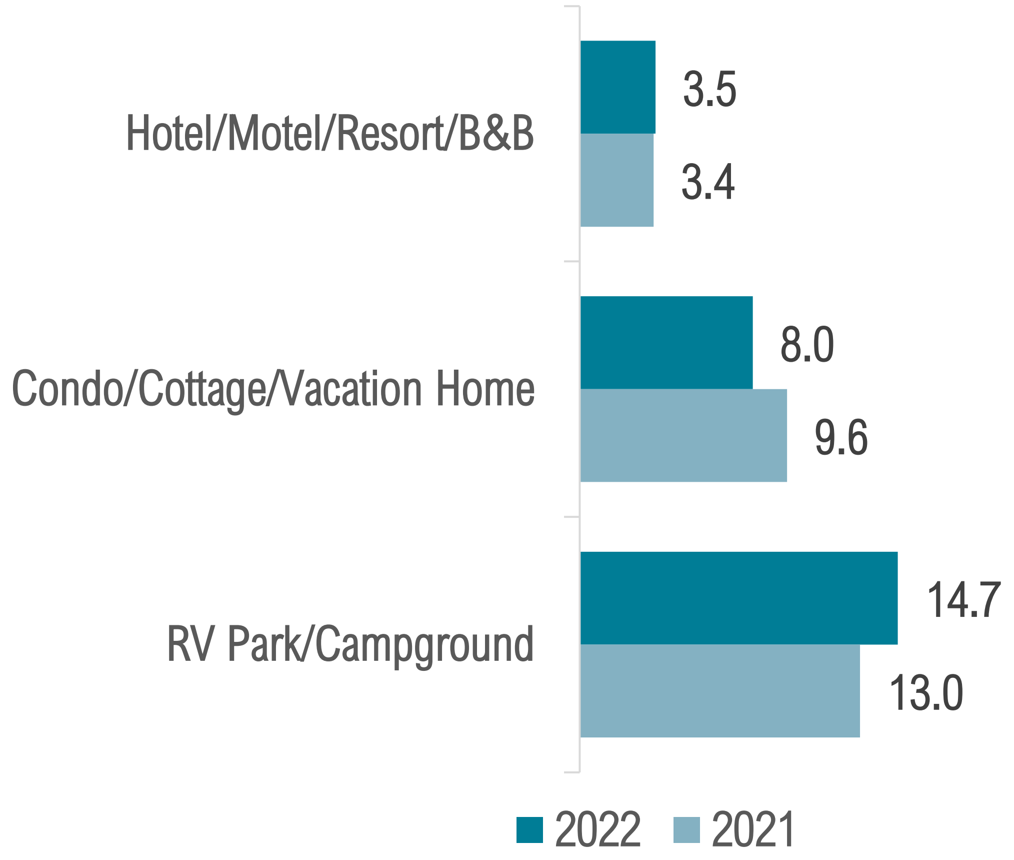
5 YEAR TREND: REVPAR[1]



[1]Note: Cumulative inflation during the same five-year period was nearly 20%, most of which occurred during 2021 and 2022.

LENGTH OF STAY

For visitors in **paid accommodations**, average length of stay in 2022 was 6.1 nights[1] (5.7 nights in 2021).



[1]Source: Occupancy Survey

VISITOR JOURNEY: PRE-VISIT

Pre-Visit

Travel Party Profile

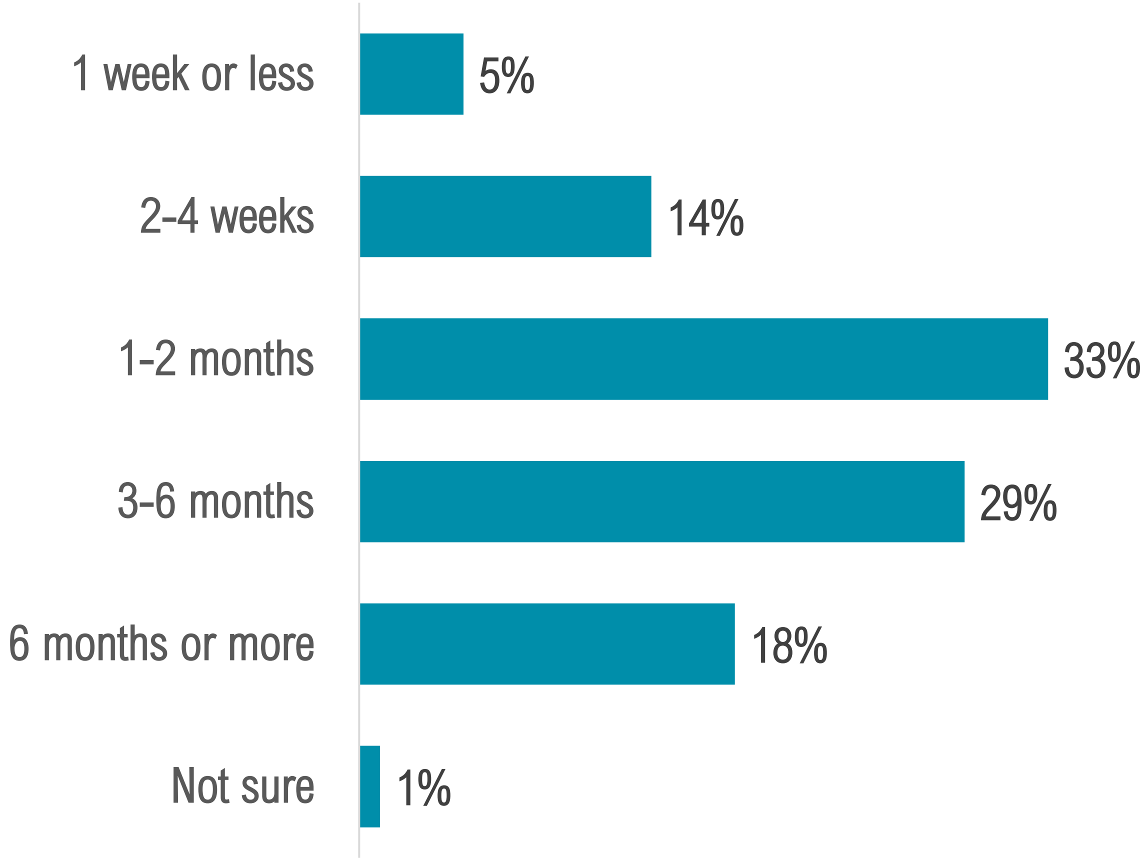
Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

TRIP PLANNING CYCLE

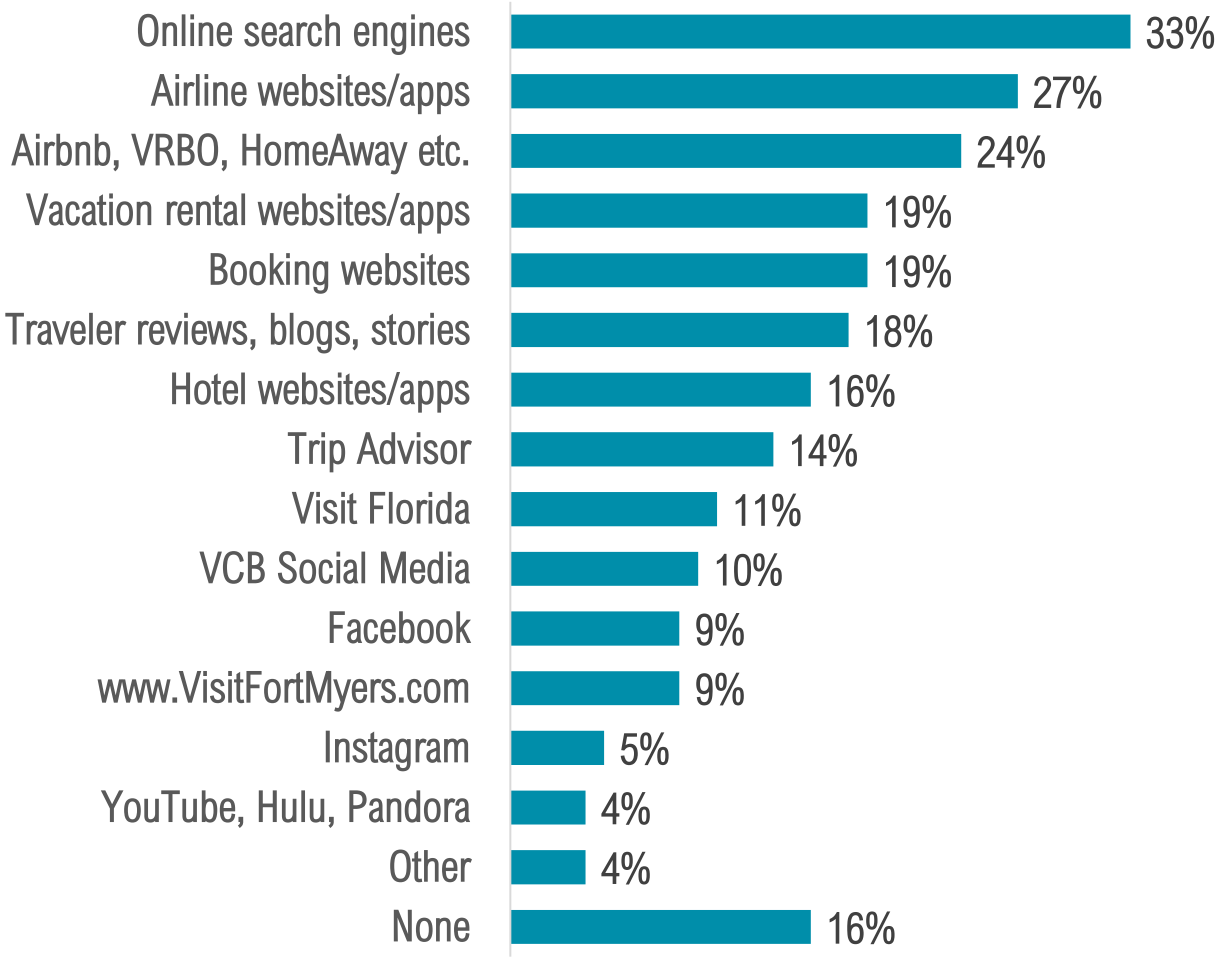
Nearly half of visitors planned their trip 3 months or more in advance, while 33% planned their trip 1-2 months in advance.



TRIP PLANNING: WEBSITES USED[1]

84% of visitors used websites to plan their trips to the Fort Myers area.

1 in 3 visitors used online search engines to plan their trips in 2022.



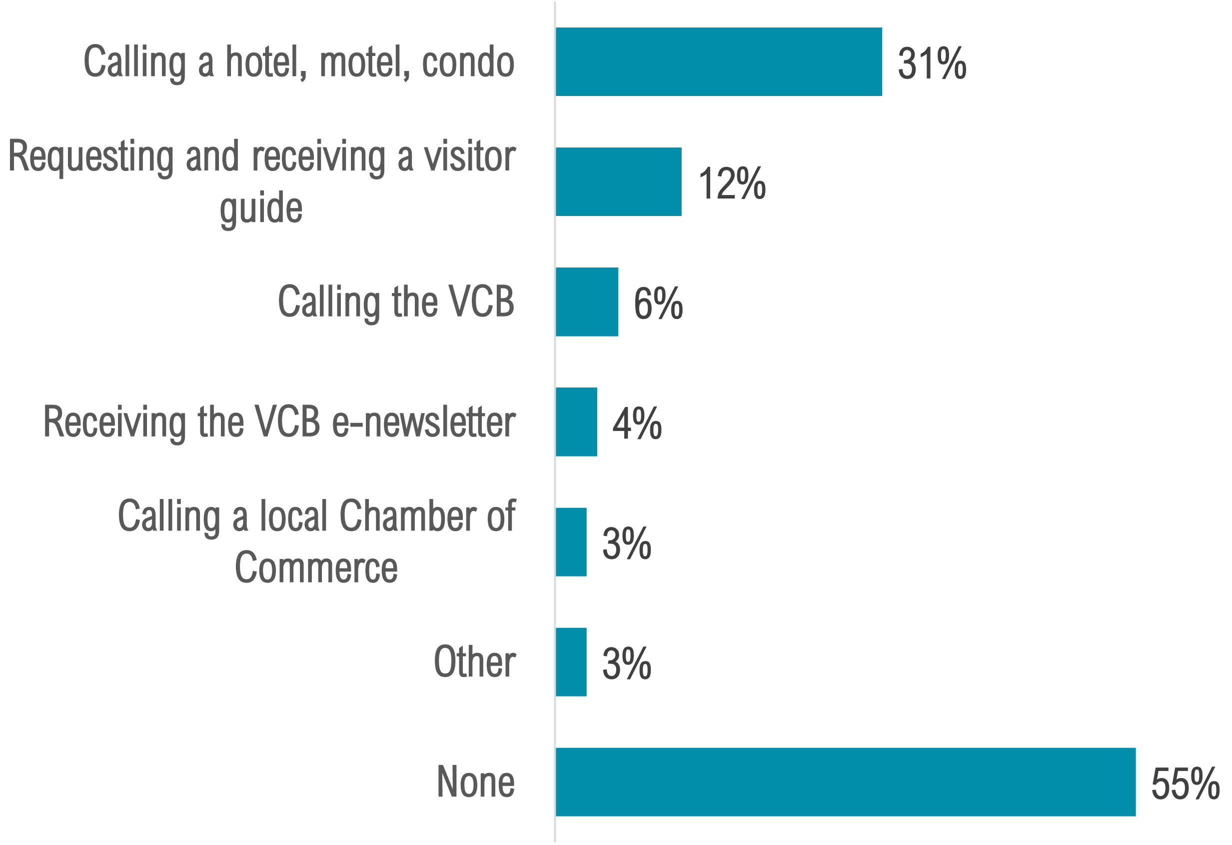
[1]Multiple responses permitted.

TRIP PLANNING: INFORMATION REQUESTS[1]

Over **2 in 5** visitors made **information requests** to plan their trips to the Fort Myers area.

Visitors who sought information prior to their trips were more likely to rely on a **hotel, motel, or condo**.

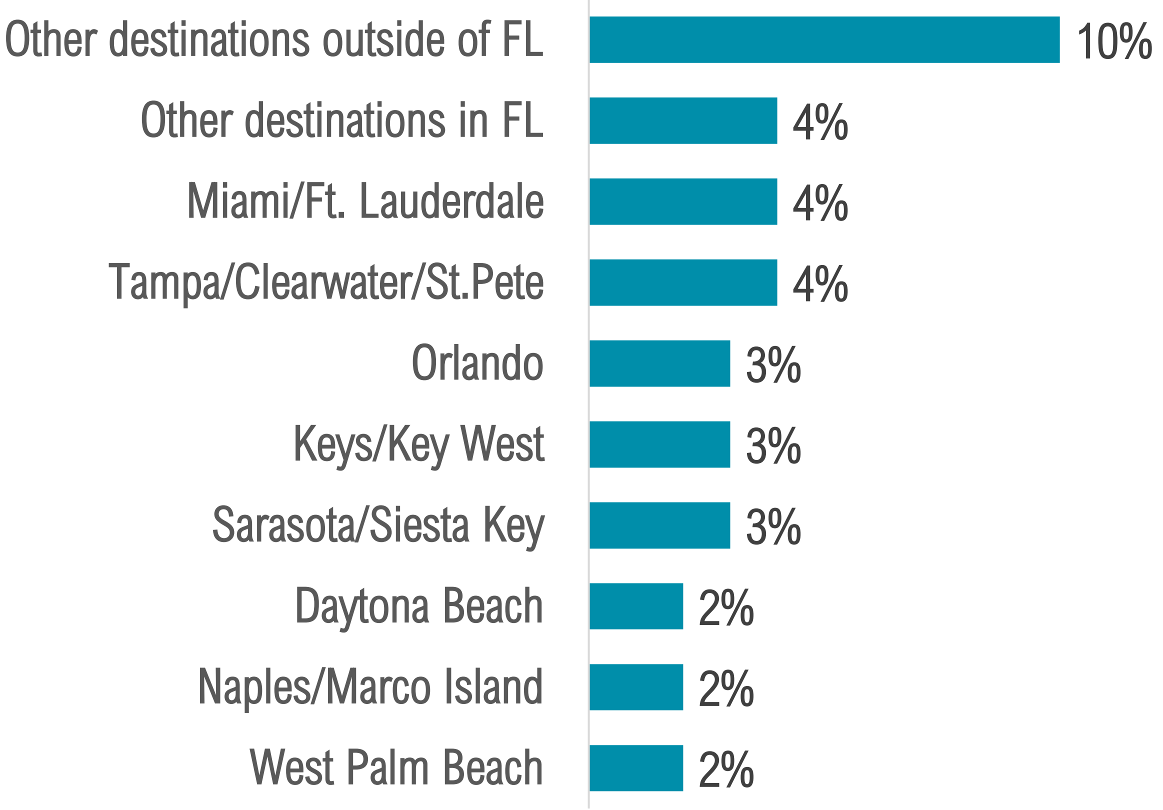
Visitors were **more likely** to **make information requests** in 2022 (+8% points).



[1]Multiple responses permitted.

TRIP PLANNING: OTHER DESTINATIONS CONSIDERED[1]

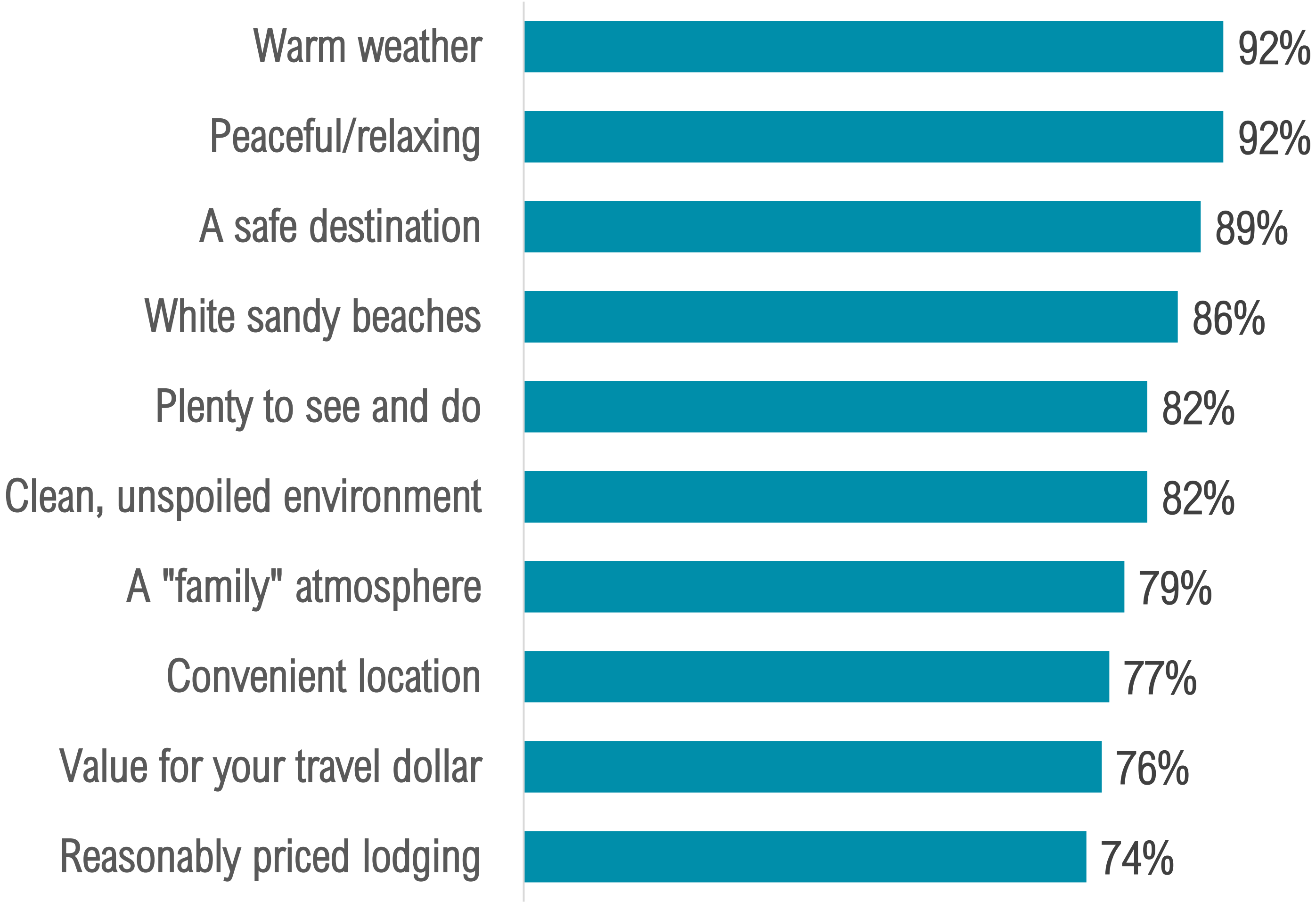
37% of visitors considered **choosing other destinations** when planning their trips.



[1]Multiple responses permitted.

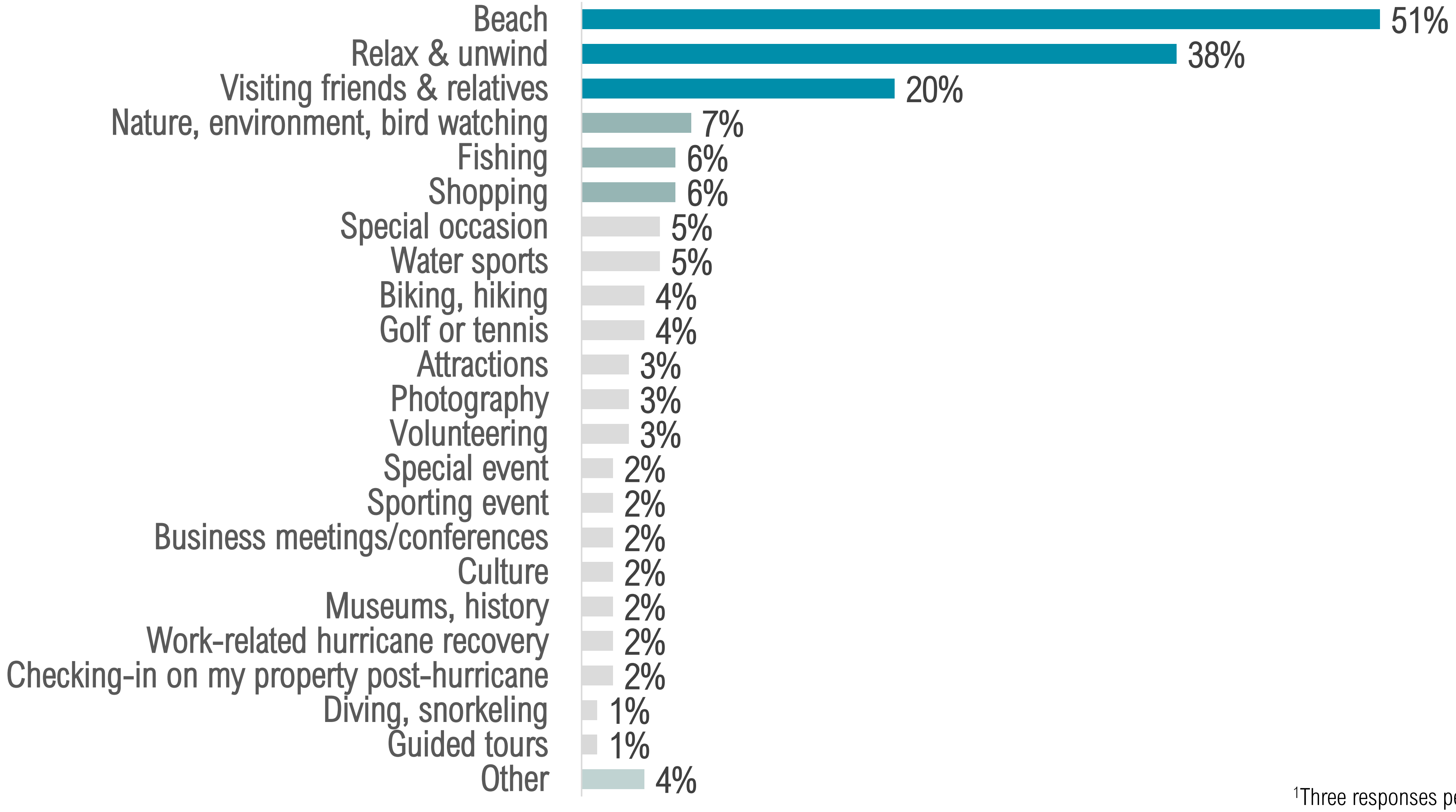
TRIP INFLUENCERS[1]

At least 9 in 10 visitors were heavily influenced by the Fort Myers area being warm and peaceful/relaxing 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]



Pre-Visit
Calendar Year 2022

[1]Three responses permitted.

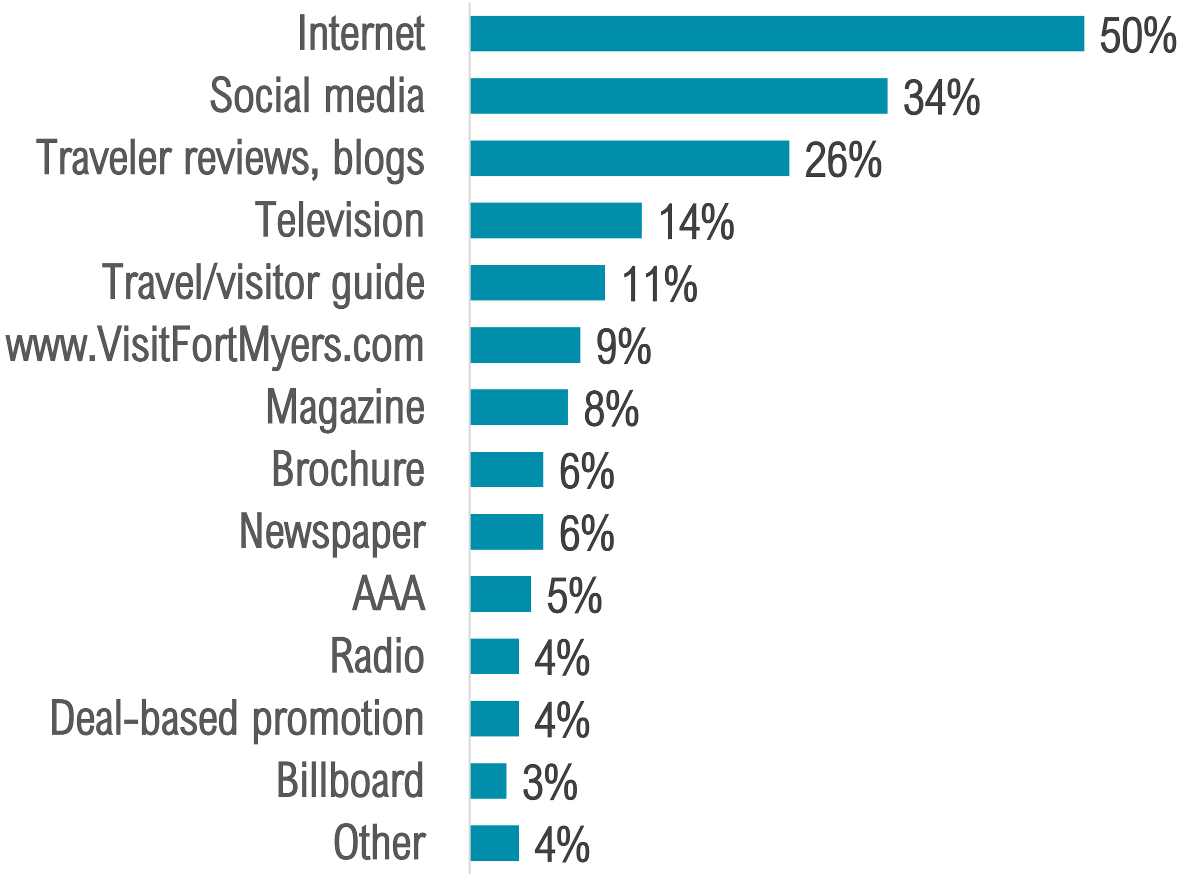
PROMOTIONS[1]

48% of visitors recalled promotions for the Fort Myers area, primarily on the internet or social media.

Promotions influenced 26% of all visitors to come to the Fort Myers area.

BASE: 48% of visitors who recalled promotions

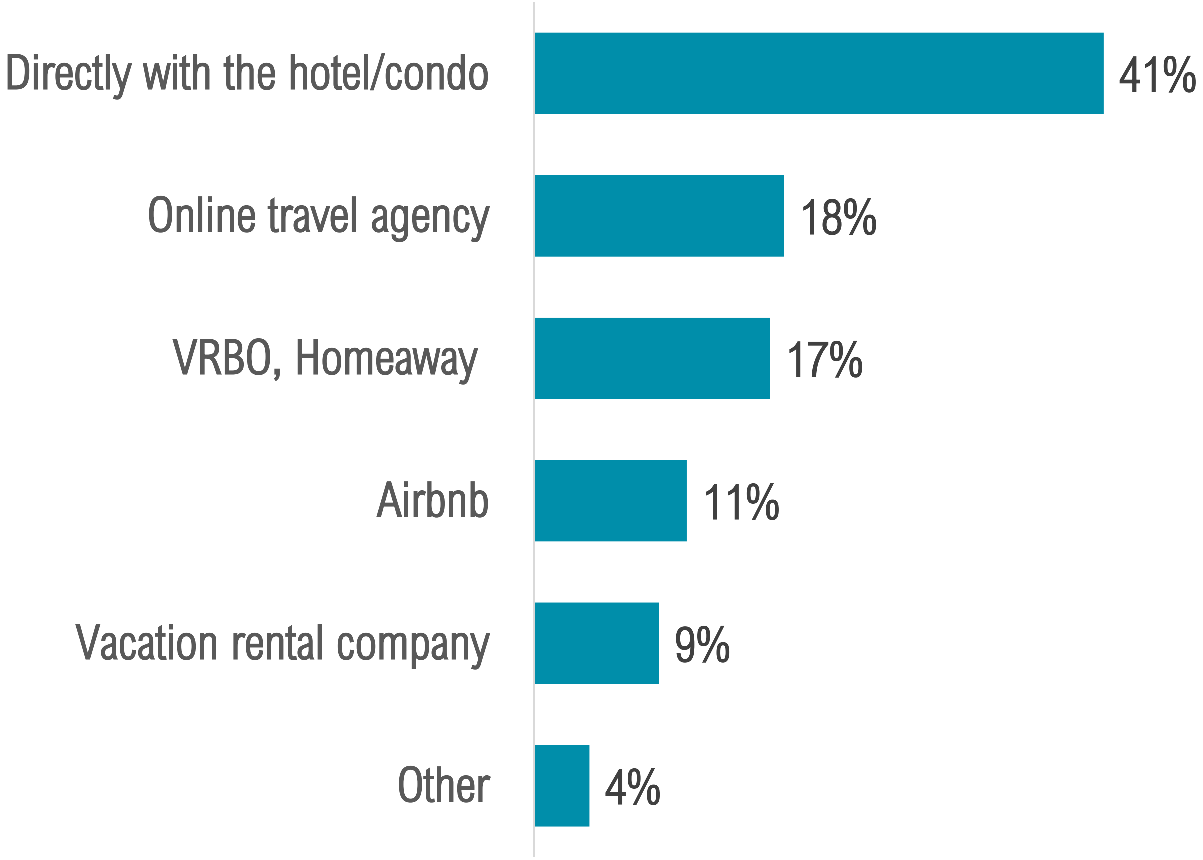
Source of Promotion



[1]Multiple responses permitted.

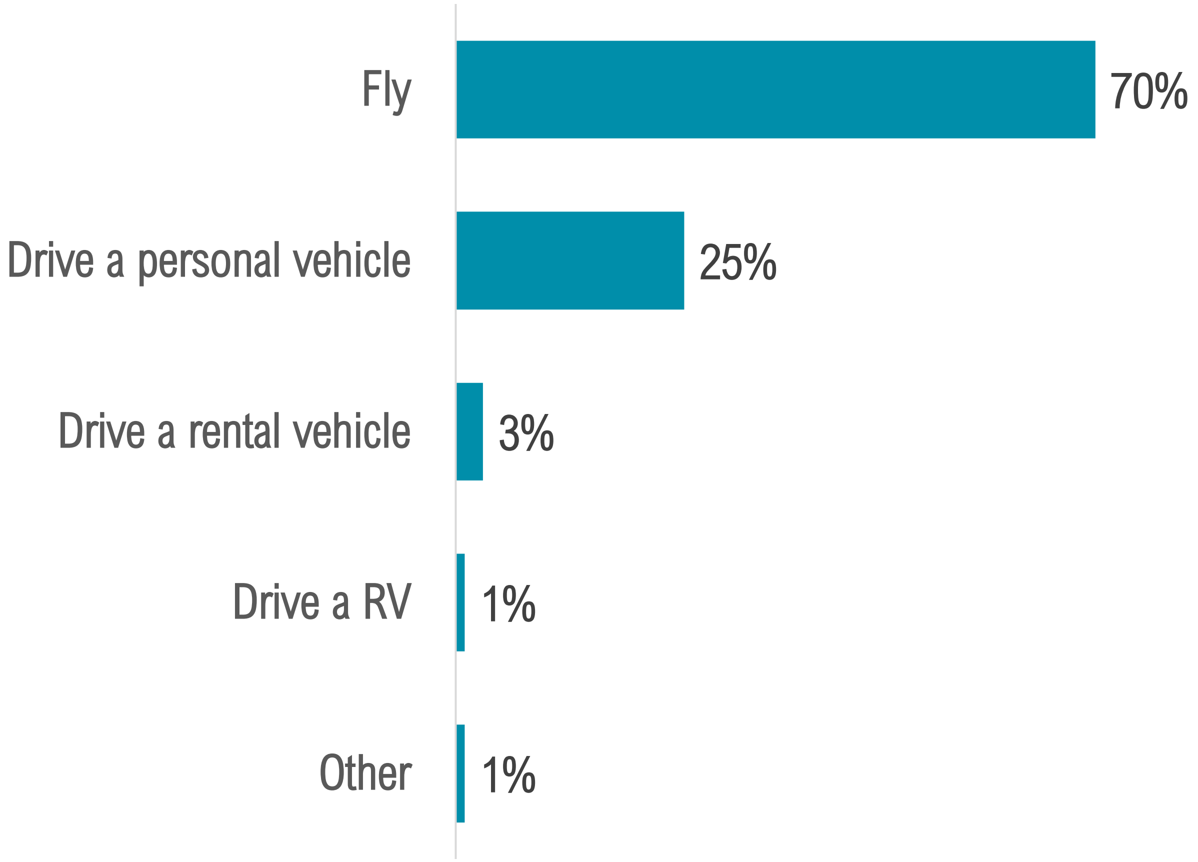
BOOKING

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



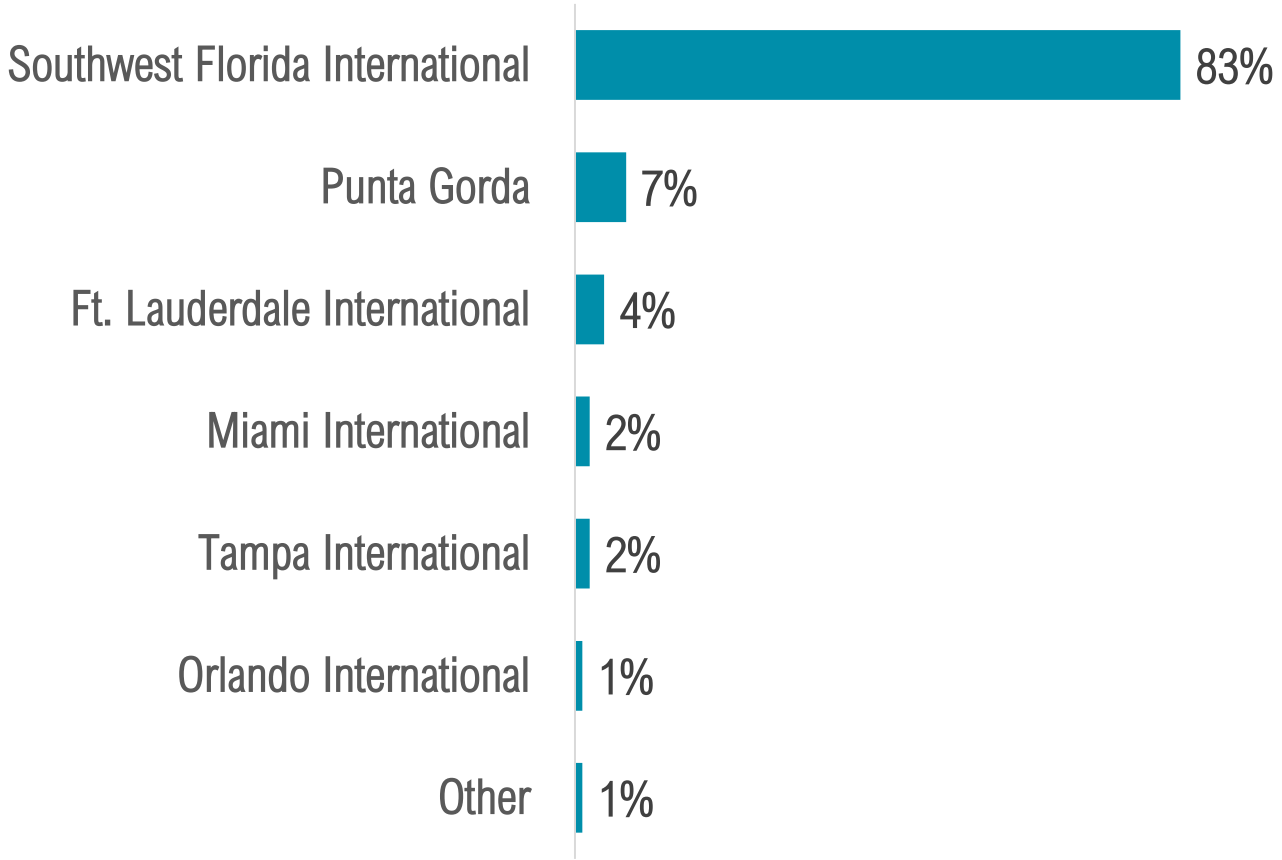
TRANSPORTATION

7 in 10 visitors **flew** to the Fort Myers area.



AIRPORT

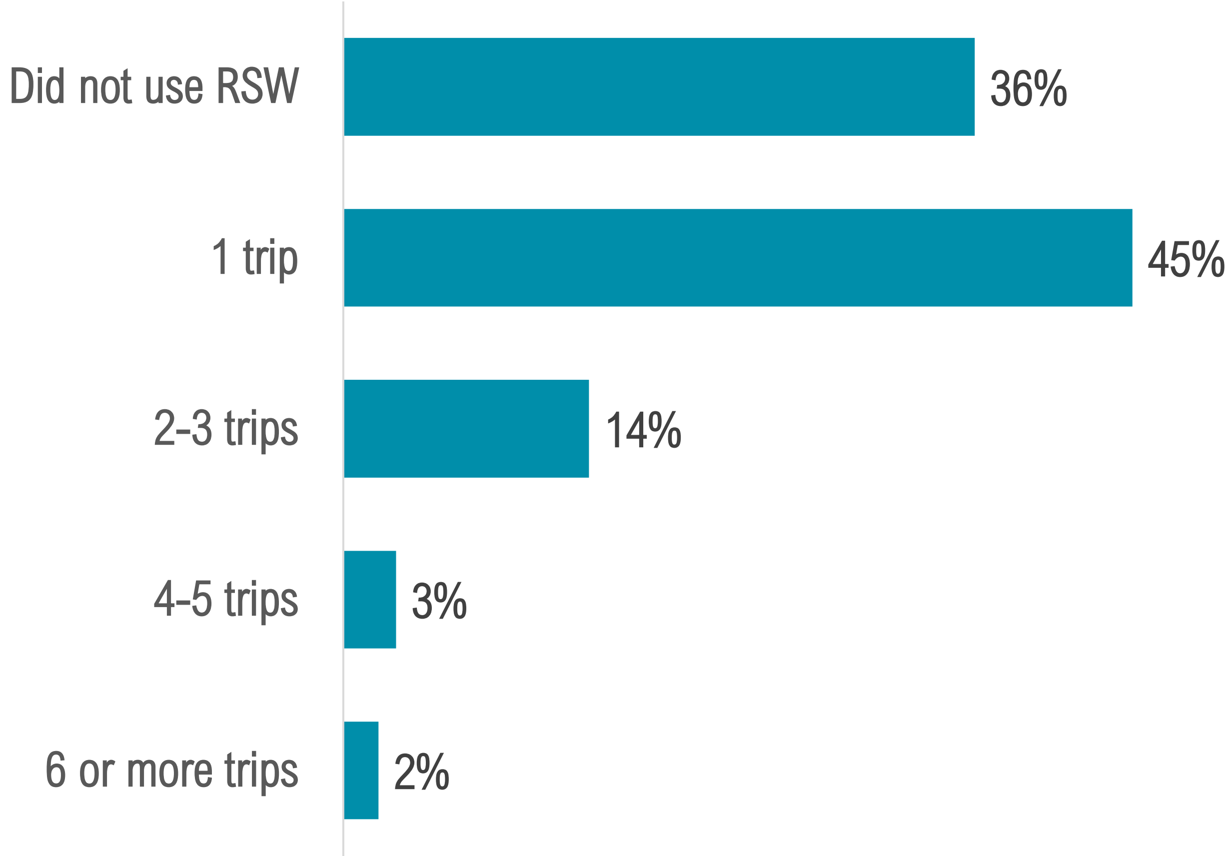
BASE: 70% of visitors who flew



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

USE OF RSW IN THE PAST YEAR

64% of visitors used RSW at least once in the past year.



VISITOR JOURNEY: TRAVEL PARTY PROFILE

Pre-Visit

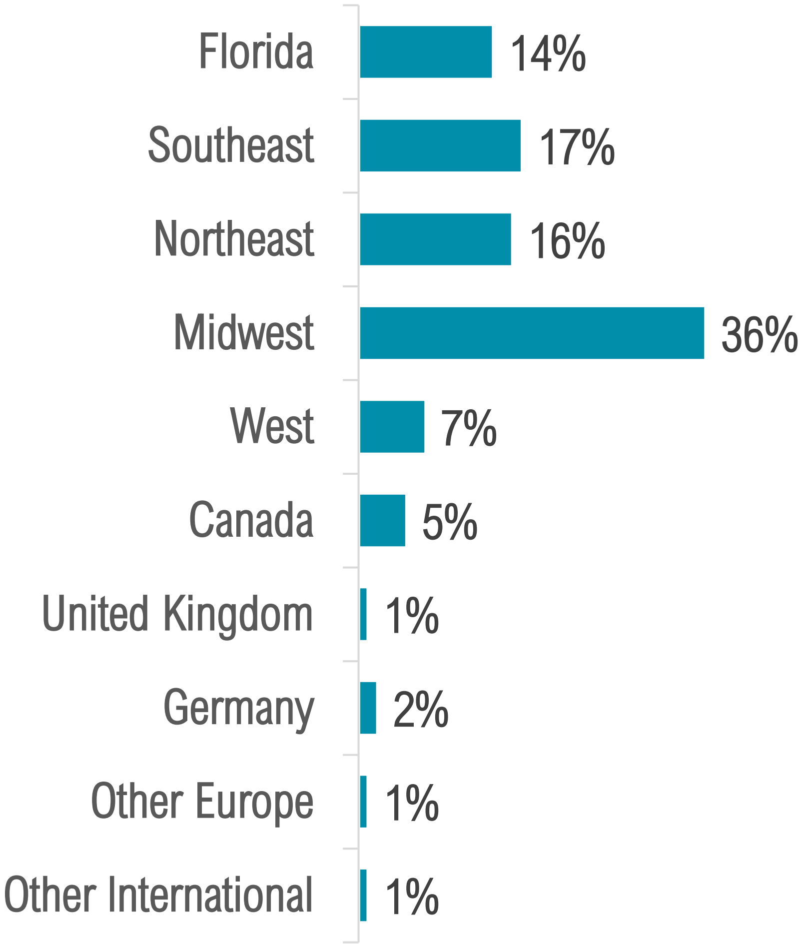
Travel Party Profile

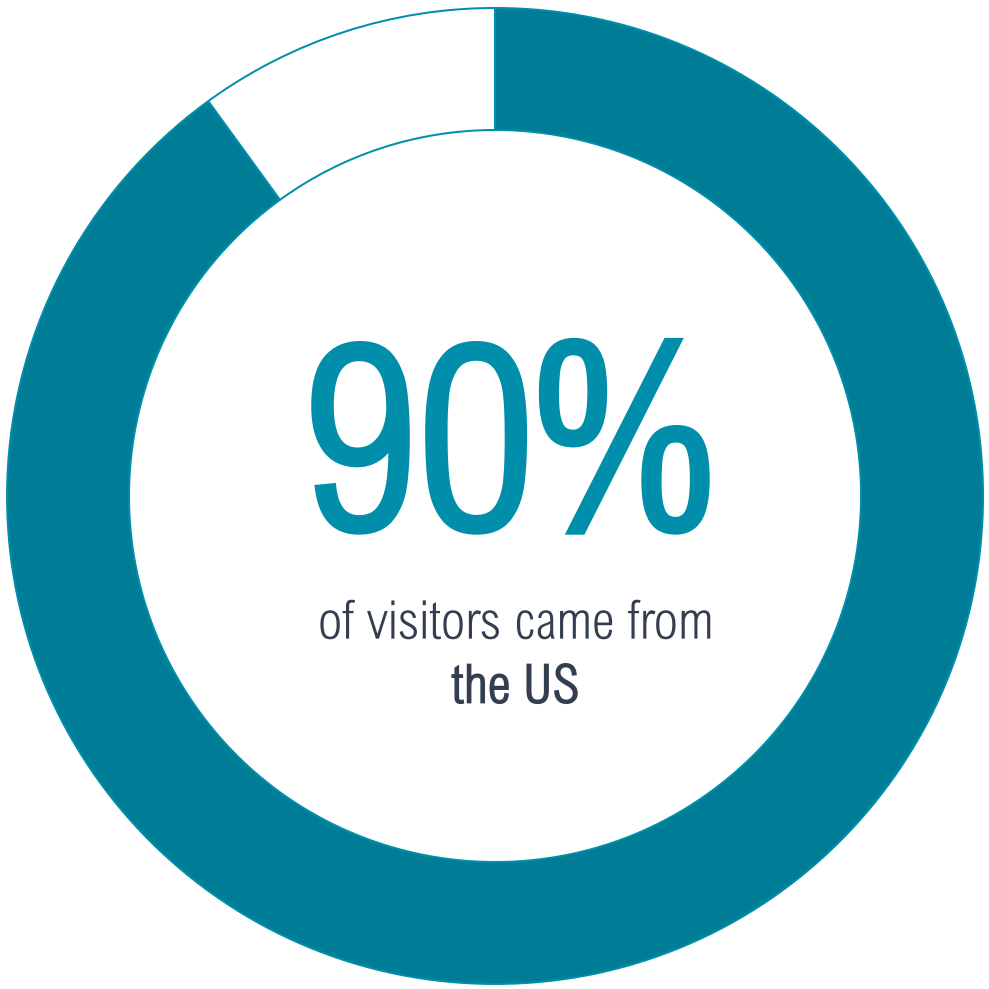
Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

ORIGIN[1]

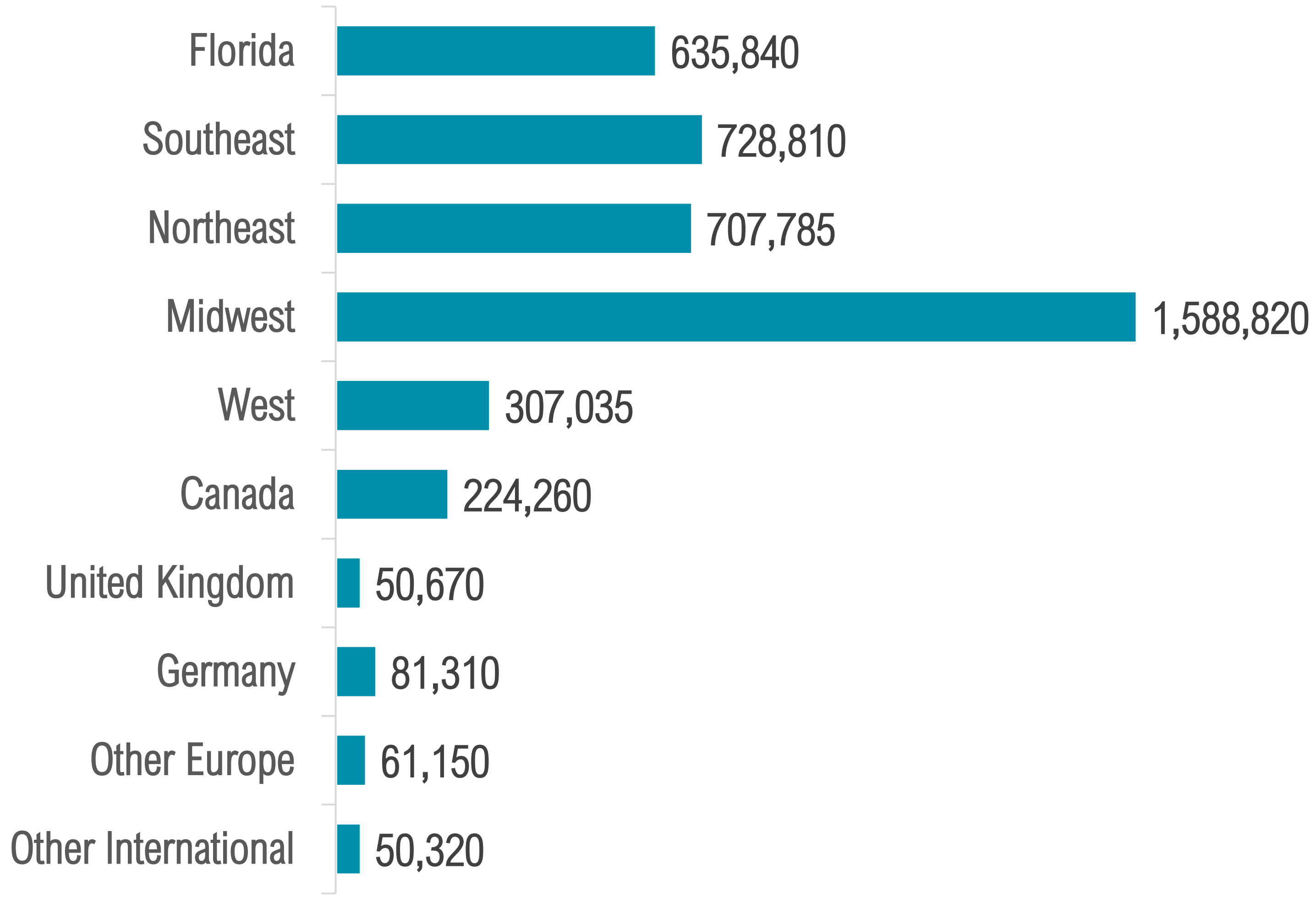




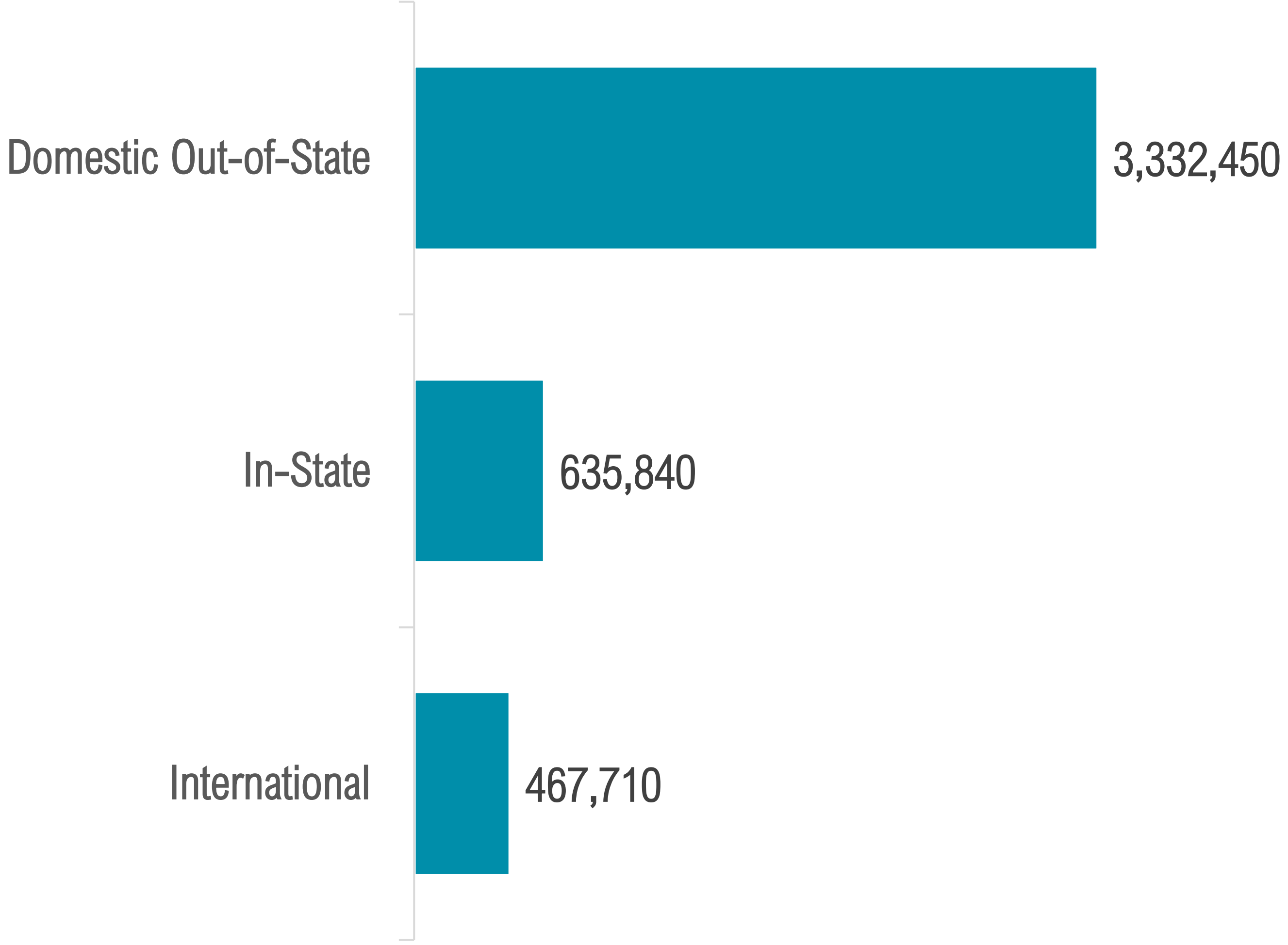
[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers.

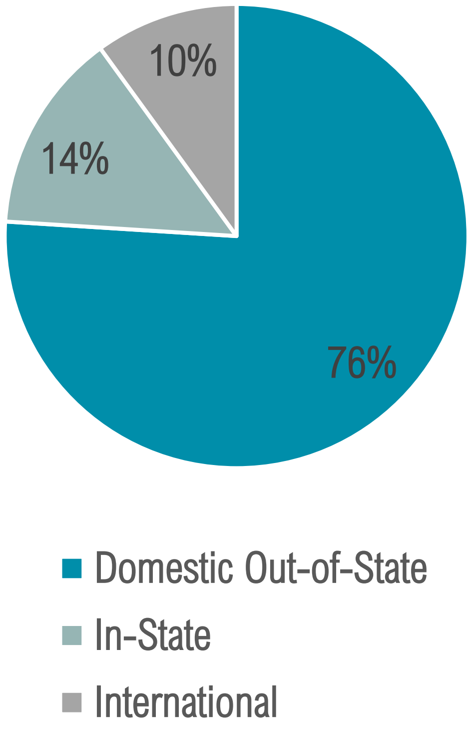
NUMBER OF VISITORS BY ORIGIN

Total of **4,436,000** visitors in 2022.

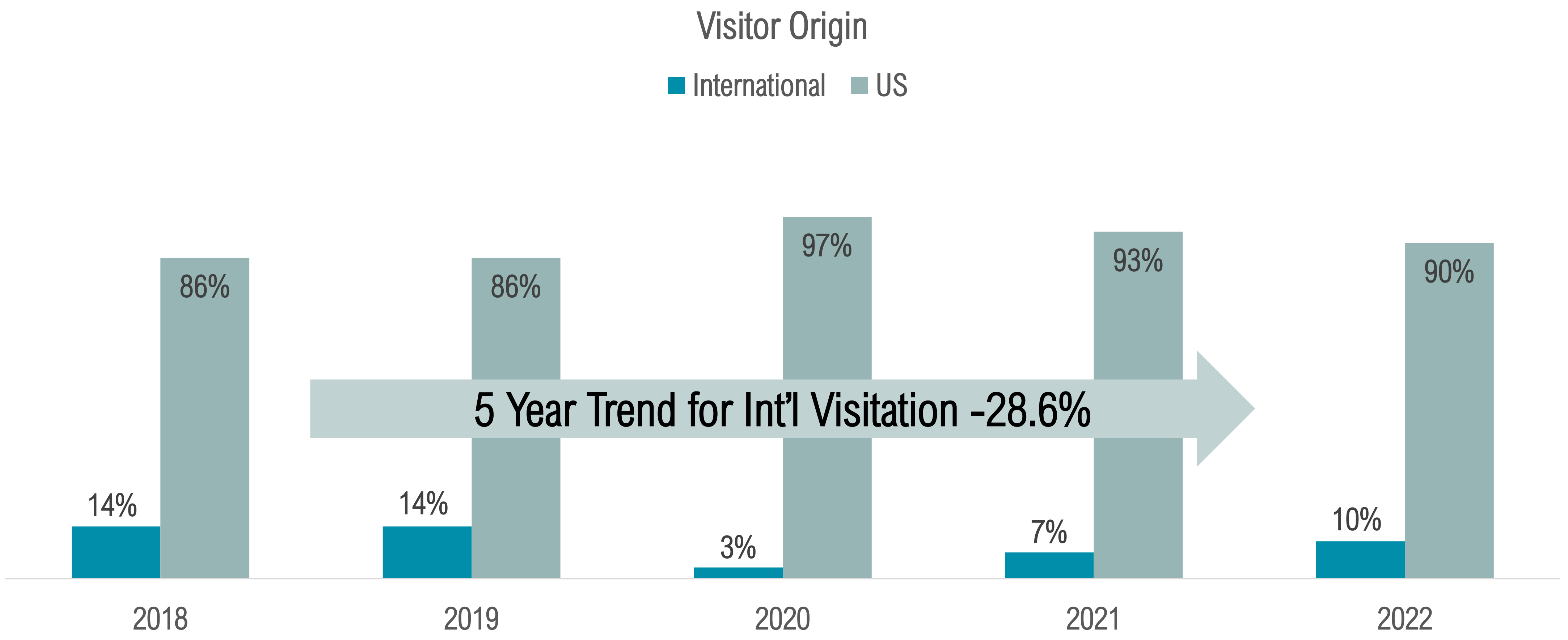


Number Of Visitors By Origin





5 YEAR TREND: US VS. INTERNATIONAL VISITATION



5 YEAR TREND: ORIGIN

Country	2018	2019	2020	2021	2022
Florida	9%	10%	11%	13%	14%
Southeast	16%	12%	17%	17%	17%
Northeast	20%	21%	20%	17%	16%
Midwest	37%	38%	42%	39%	36%
West	3%	5%	7%	7%	7%
International	14%	14%	3%	7%	10%

ORIGIN COUNTRY

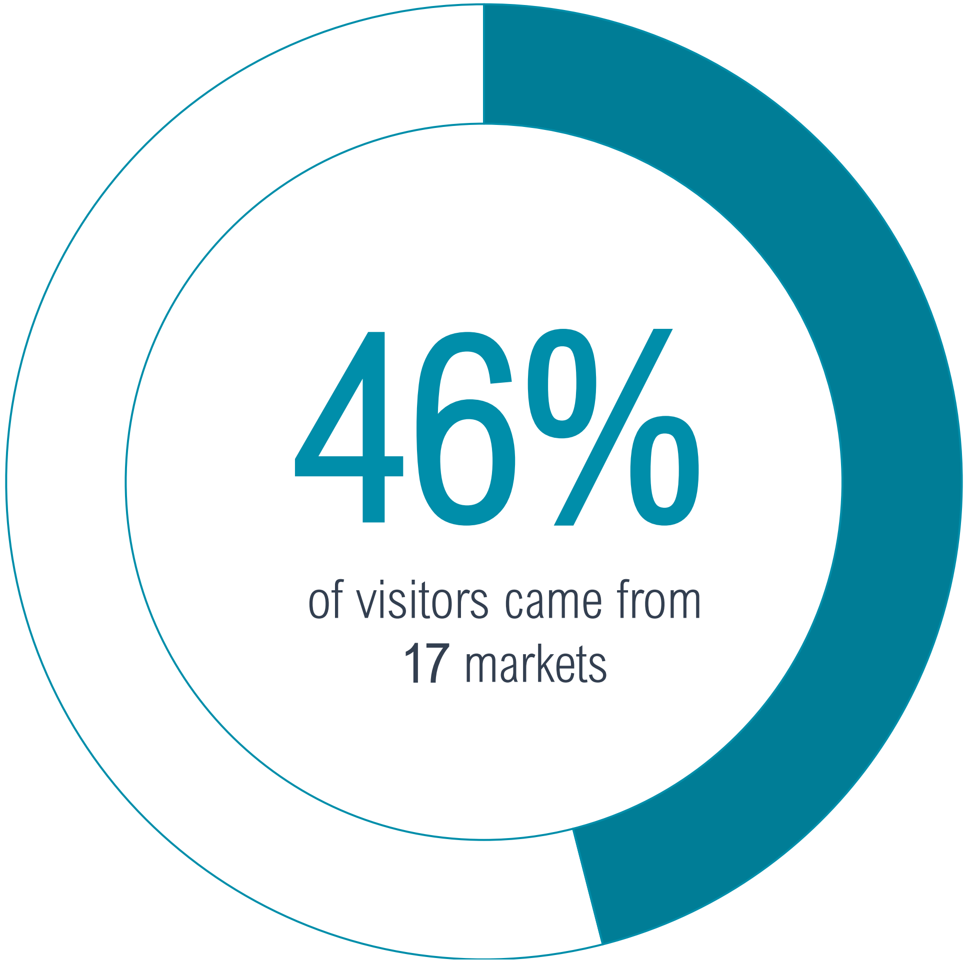
Country	% of Visitors
United States	90.0%
Canada	5.1%
UK	1.1%
Germany	1.8%
Other	2.5%

5 YEAR TREND: ORIGIN COUNTRY

Country	2018	2019	2020	2021	2022
United States	86%	86%	97%	93%	90%
Canada	4%	4%	2%	3%	5%
Germany	4%	4%	<1%	1%	1%
United Kingdom	2%	2%	<1%	1%	2%
Other	4%	4%	<1%	2%	2%

TOP ORIGIN MARKETS[1]

Market	Percentage of Visitors
Miami-Ft Lauderdale	5%
Tampa-St. Petersburg	4%
Chicago	4%
New York	4%
Minneapolis-St. Paul	3%
Cleveland-Akron	3%
Atlanta	3%
Boston	3%
Cincinnati	3%
Detroit	2%
Orlando-Daytona Beach-Melbourne	2%
Jacksonville	2%
Milwaukee	2%
Washington, DC-Hagerstown	2%
Houston	2%
Louisville	2%
Des Moines-Ames	2%



[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers.

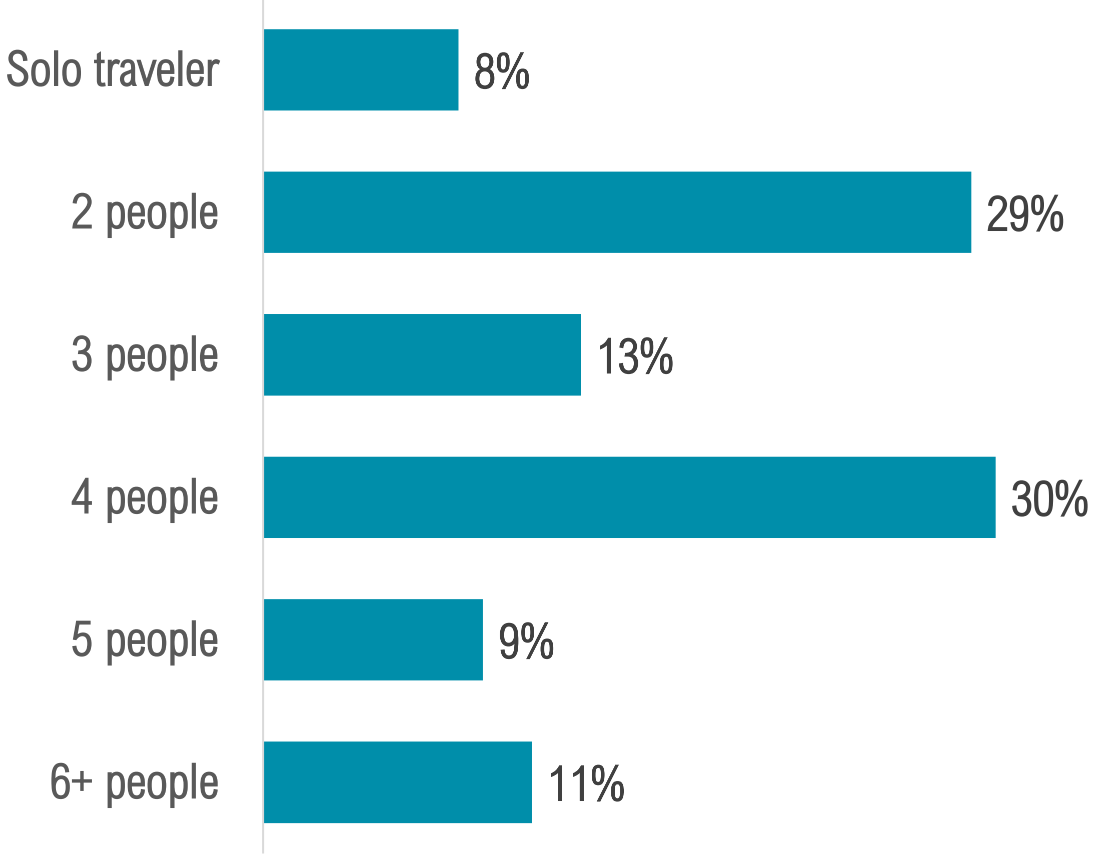
TRAVEL PARTY SIZE AND COMPOSITION

Travel Party Size

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

Travel with Children

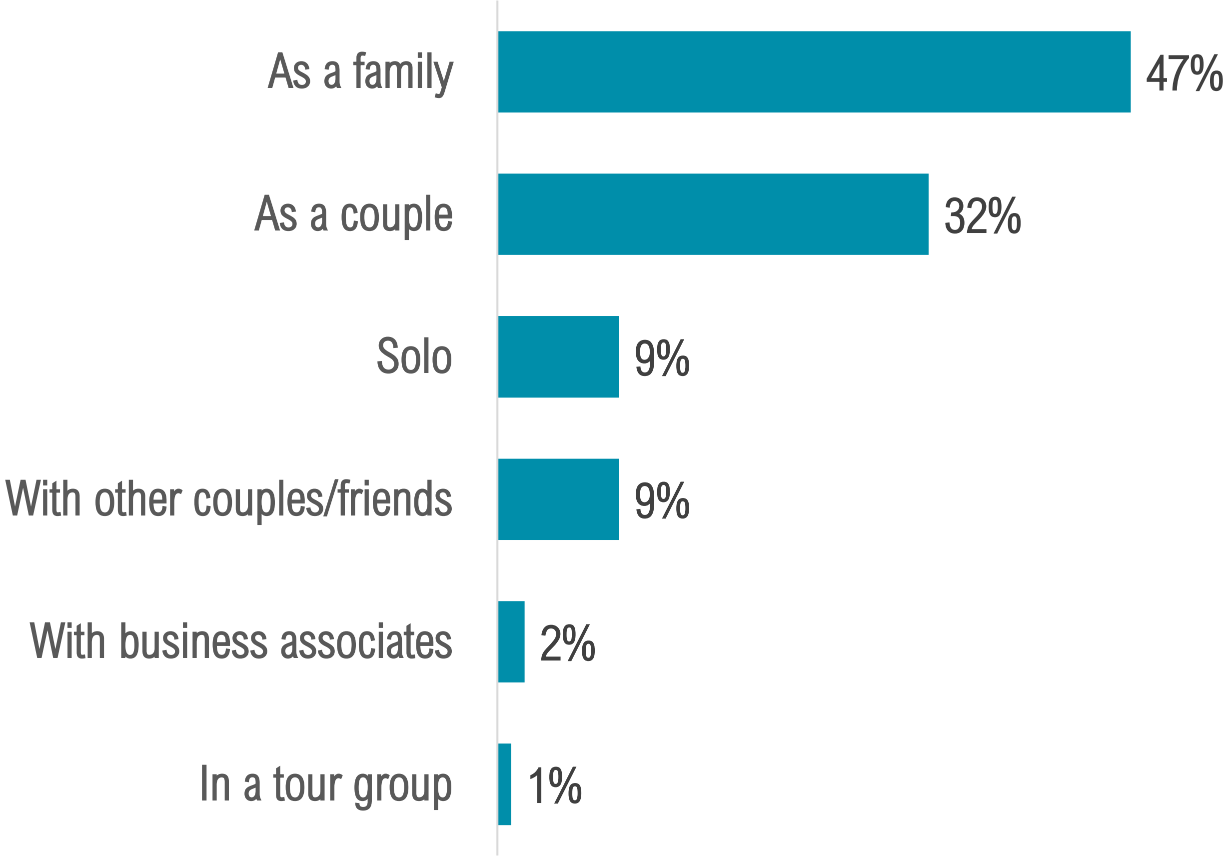
40% of visitors traveled with children under the age of 18.



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

TRAVEL PARTY TYPE

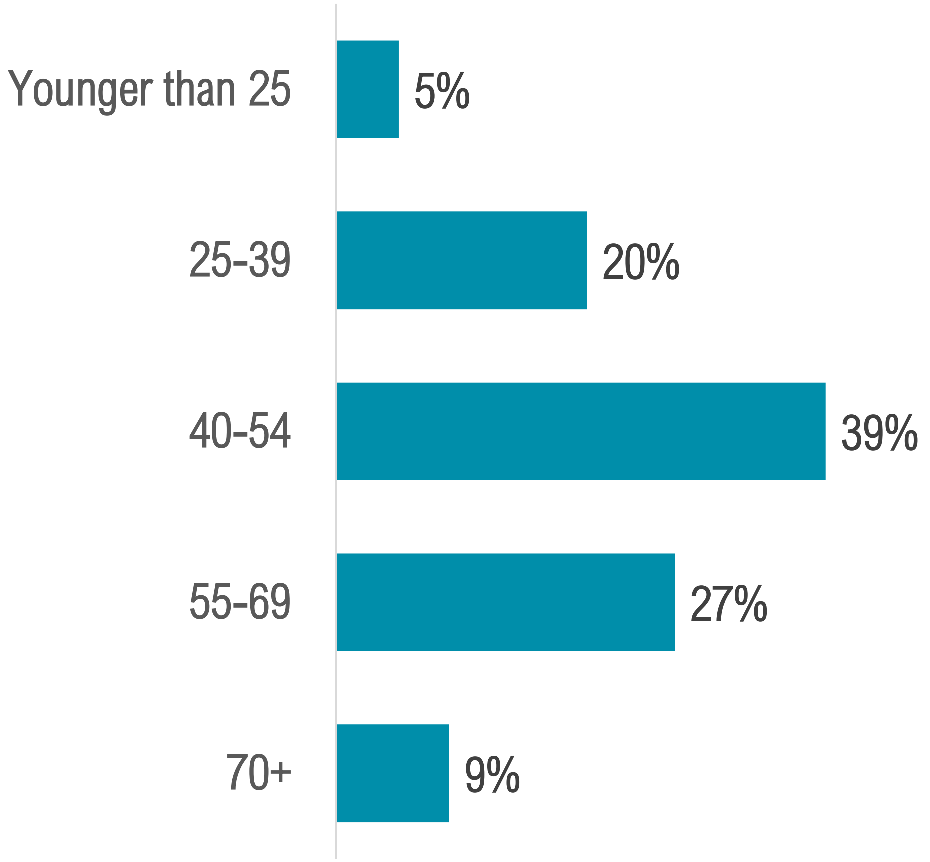
Visitors primarily traveled as a **family** or as a **couple**.



AGE

Median Age

The median age of 2022 visitors was **50 years old.**

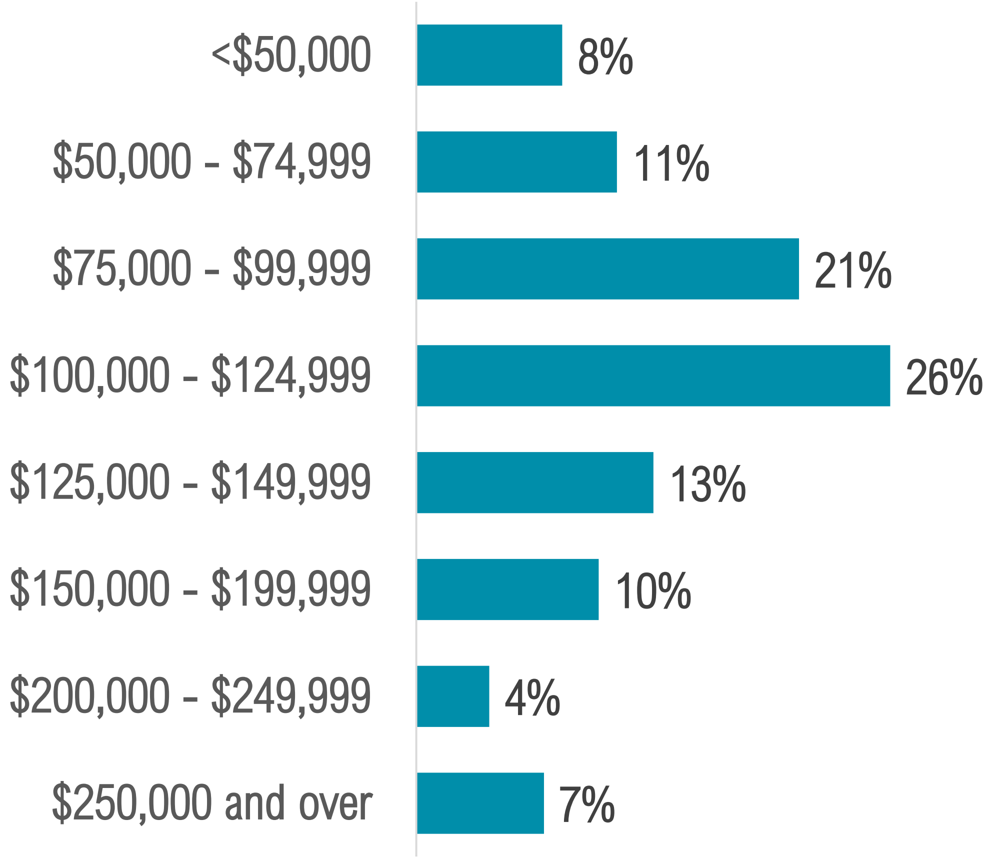


HOUSEHOLD INCOME

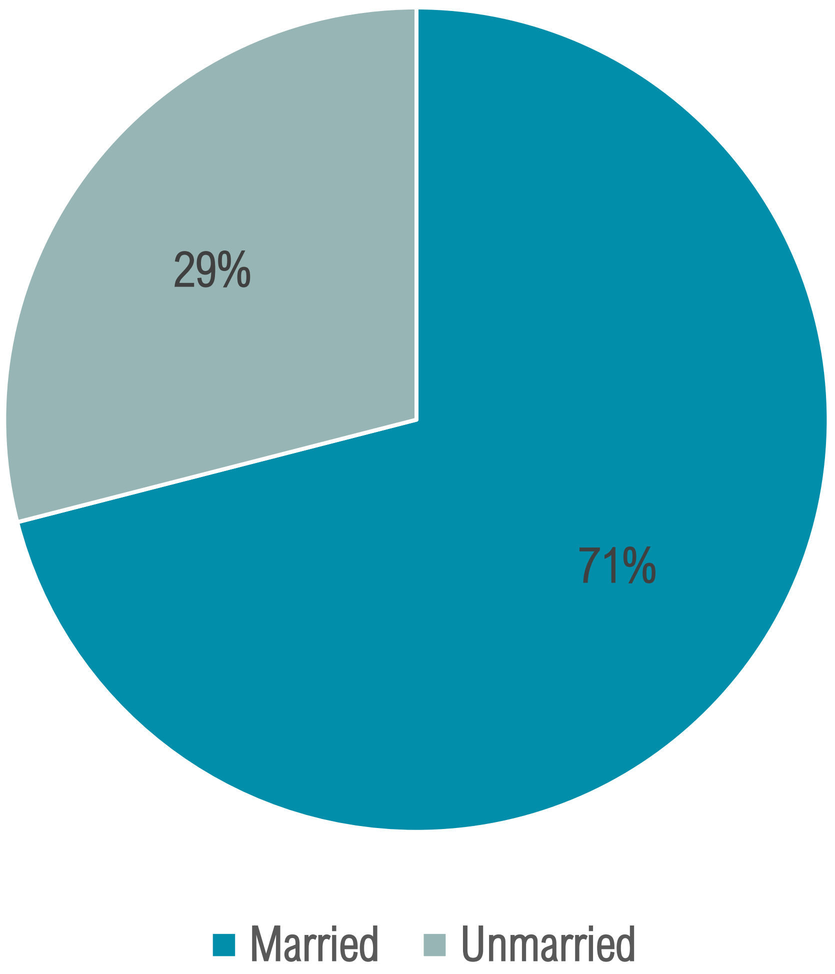
Median Household Income

2022 visitors had a median household income of **$109,600.**

11% of visitors earned more than **$200,000.**



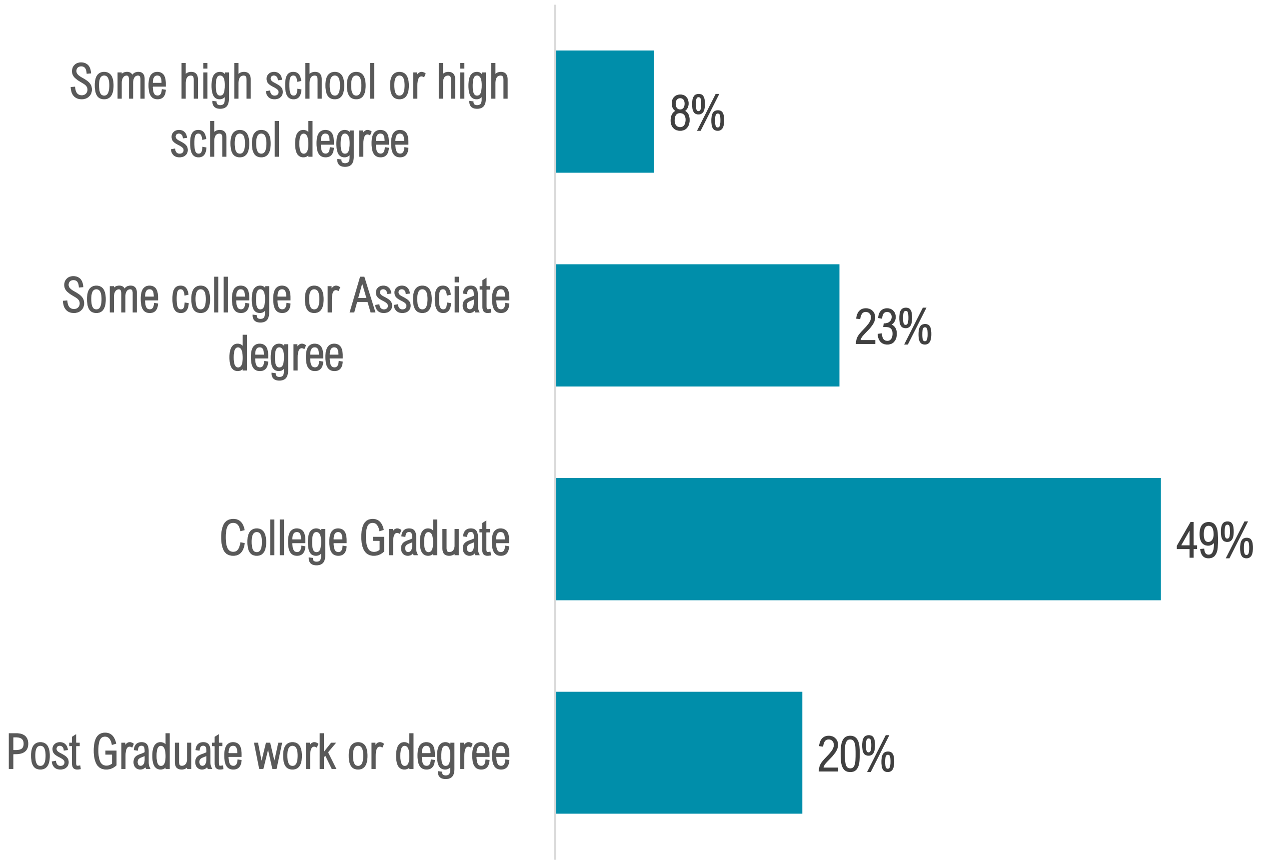
MARITAL STATUS



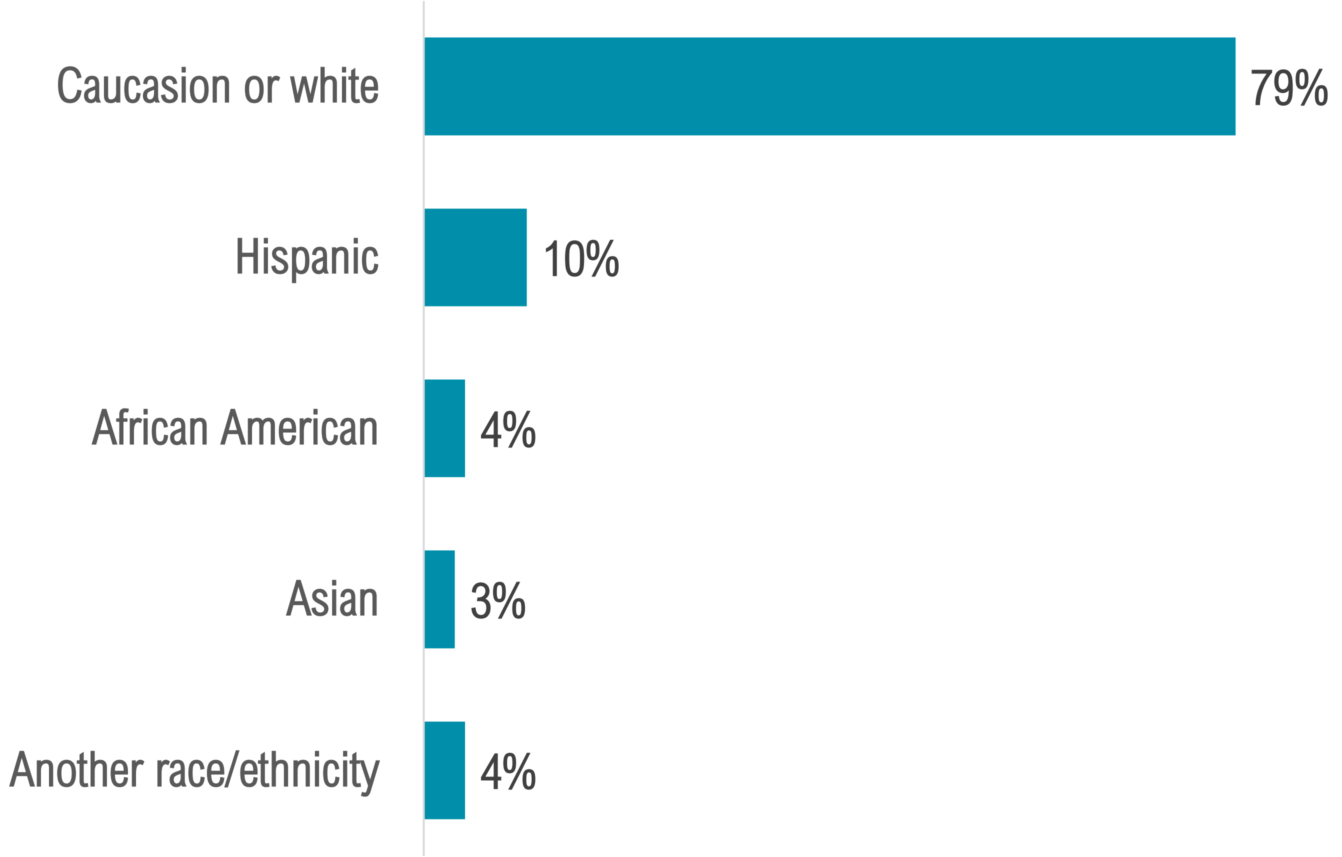
EDUCATION

College Education

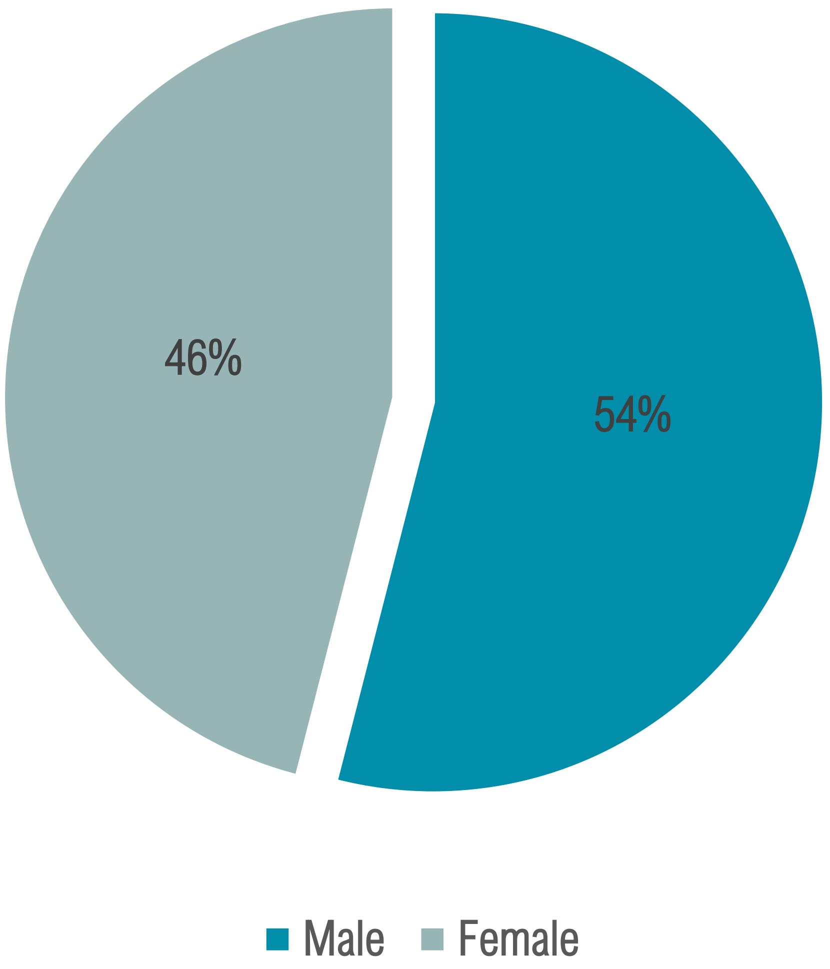
69% of 2022 visitors were college graduates.



RACE/ETHNICITY



GENDER



VISITOR JOURNEY: TRIP EXPERIENCE

Pre-Visit

Travel Party Profile

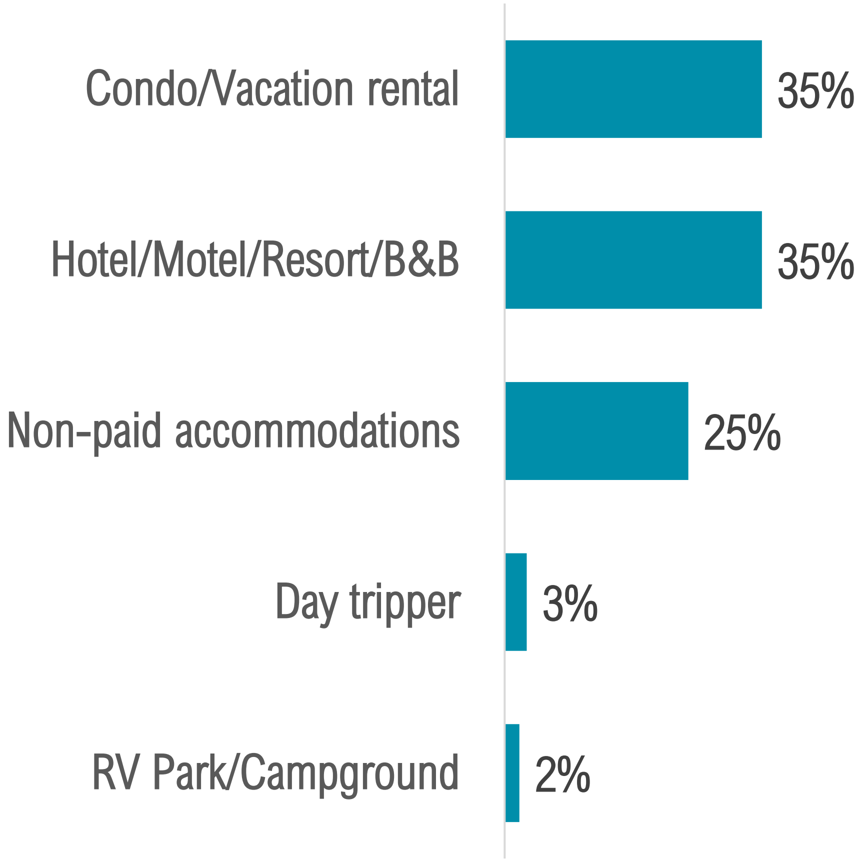
Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

ACCOMMODATIONS

7 in 10 visitors stayed in paid accommodations such as a hotel/motel/resort/B&B, condo/vacation rental, or a RV park/campground.



NIGHTS STAYED[1]

All Visitors

Visitors spent 6.6[1] nights in the Fort Myers area.

Visitors Staying in Paid Accommodations

Visitors staying in paid accommodations spent 6.1[1] nights in the Fort Myers area.

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

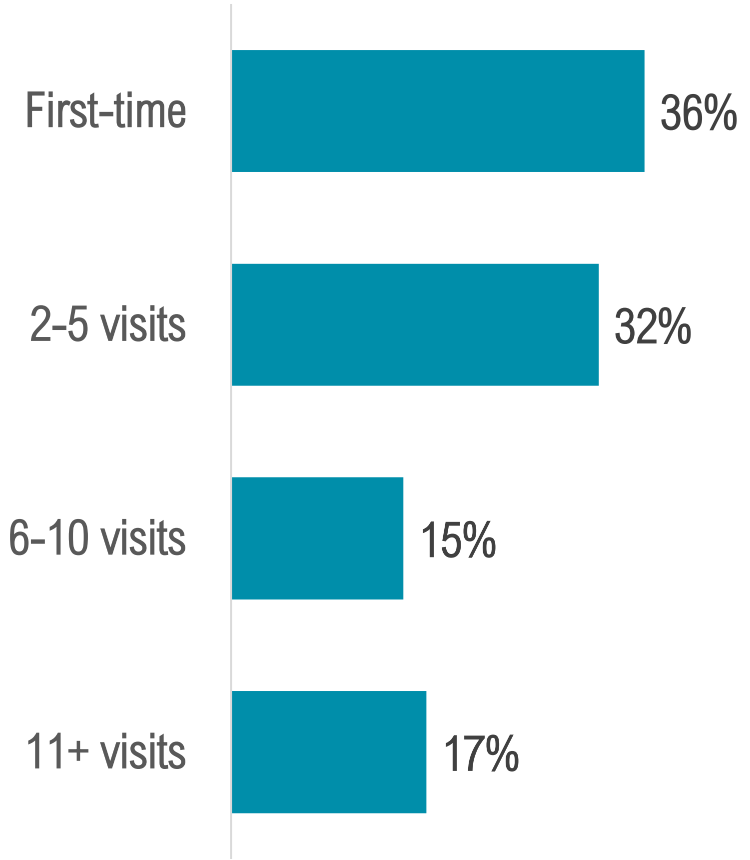
FIRST TIME AND EXPERIENCED VISITORS

First Time vs. Repeat Visitors

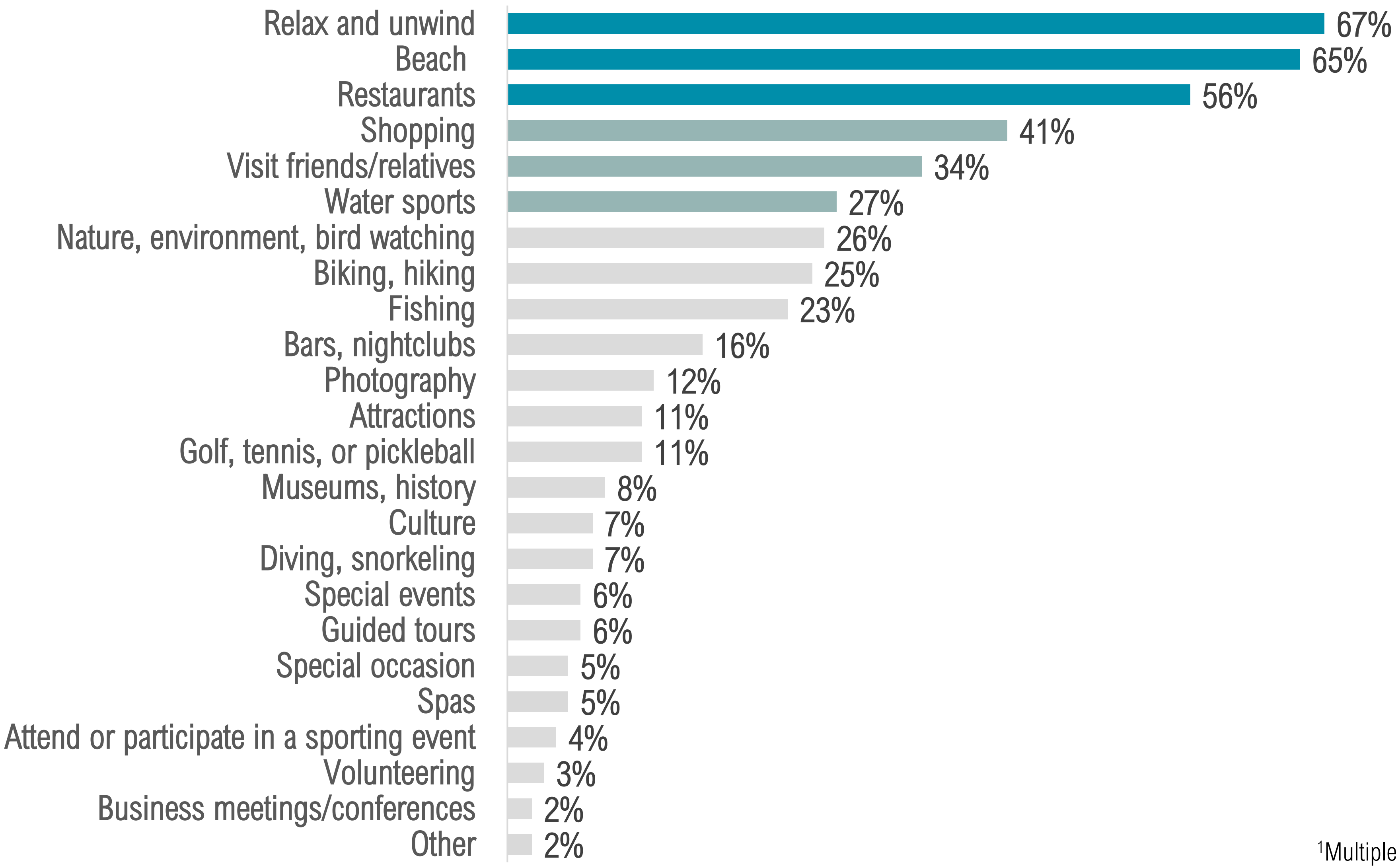
64% of visitors had **previously visited** the Fort Myers area, while 36% were visiting for the **first time**.

First Time vs. Repeat Visitors

1 in 6 visitors were loyalists, i.e., they had visited more than 10 times.

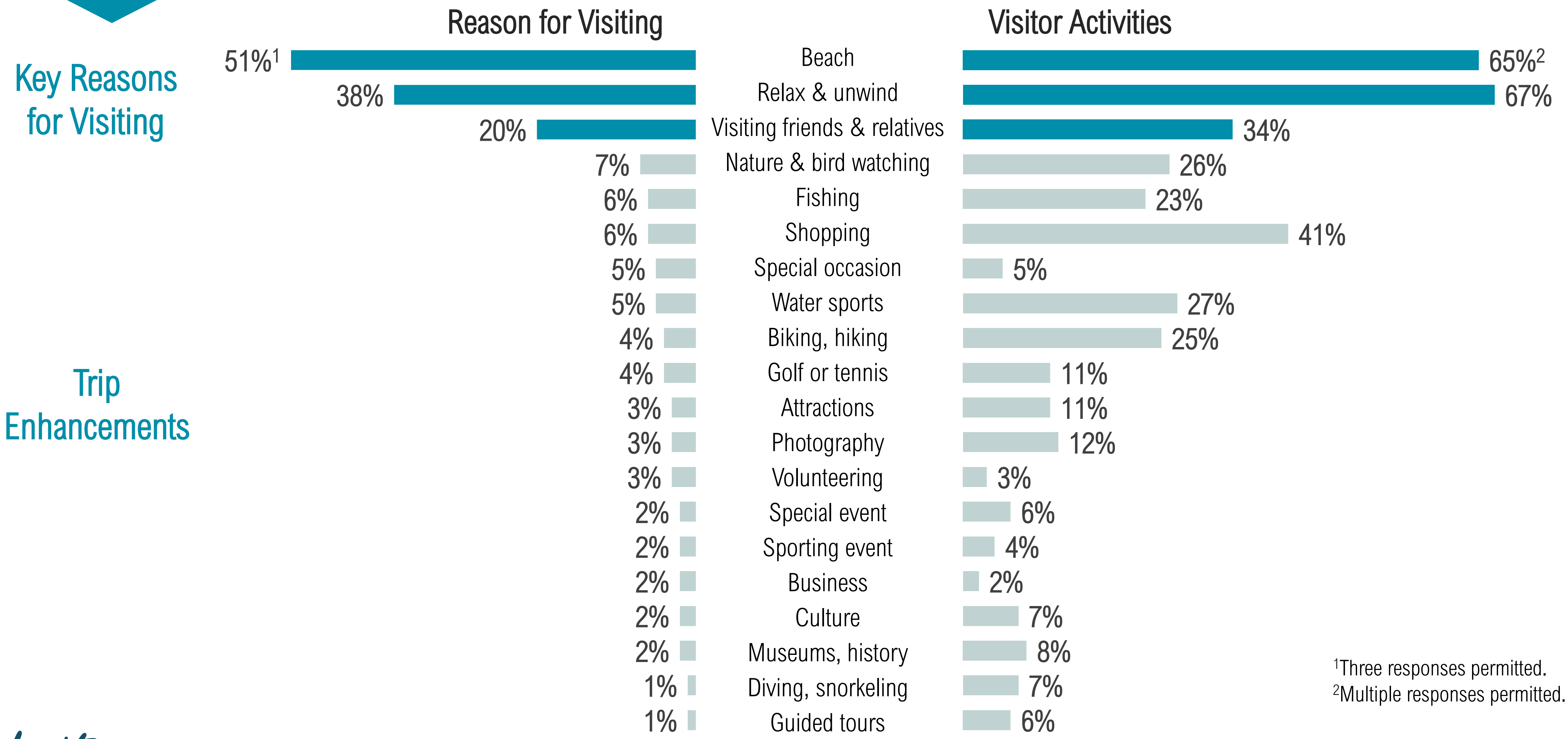


VISITOR ACTIVITIES[1]



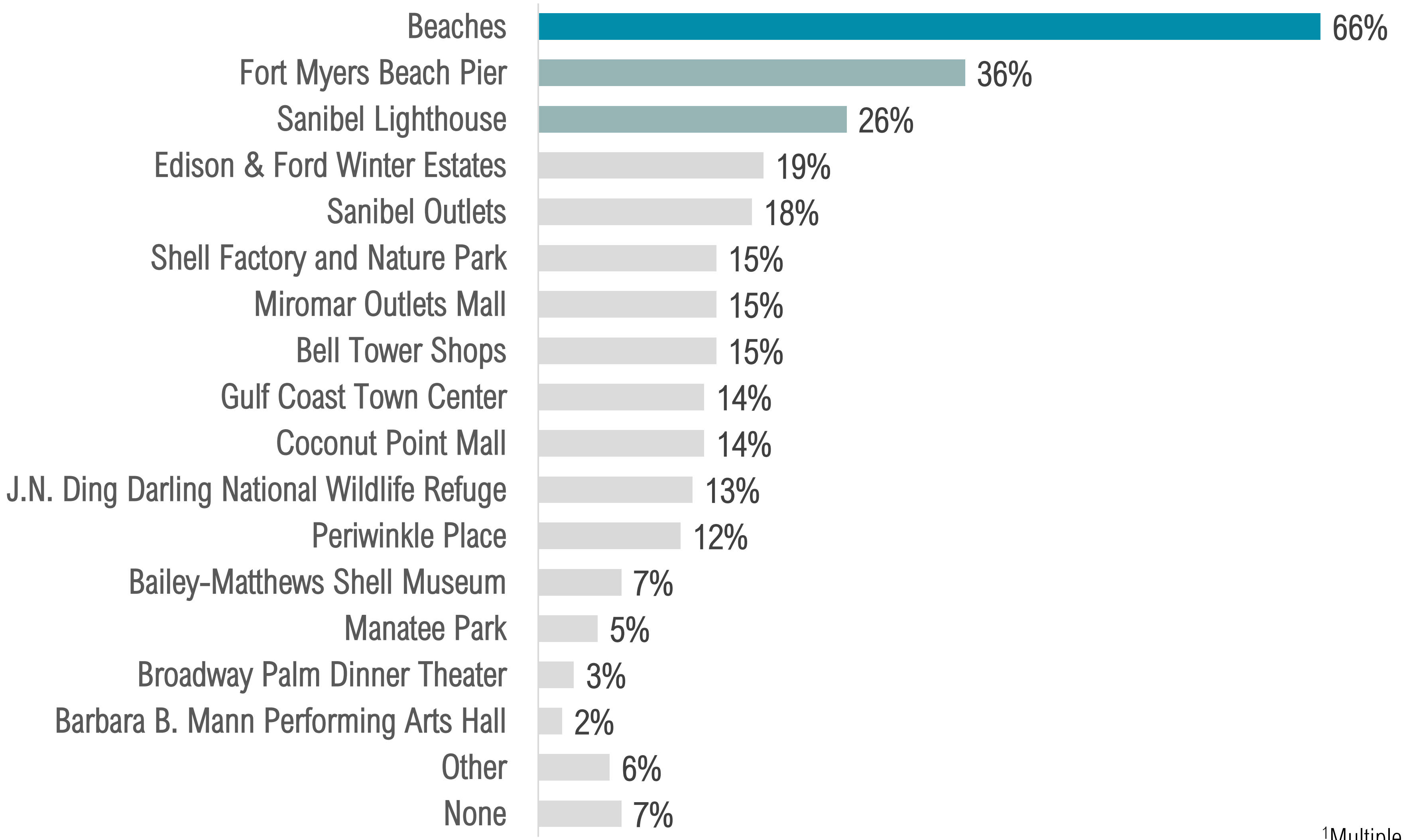
[1]Multiple responses permitted.

REASON FOR VISITING VS. VISITOR ACTIVITIES



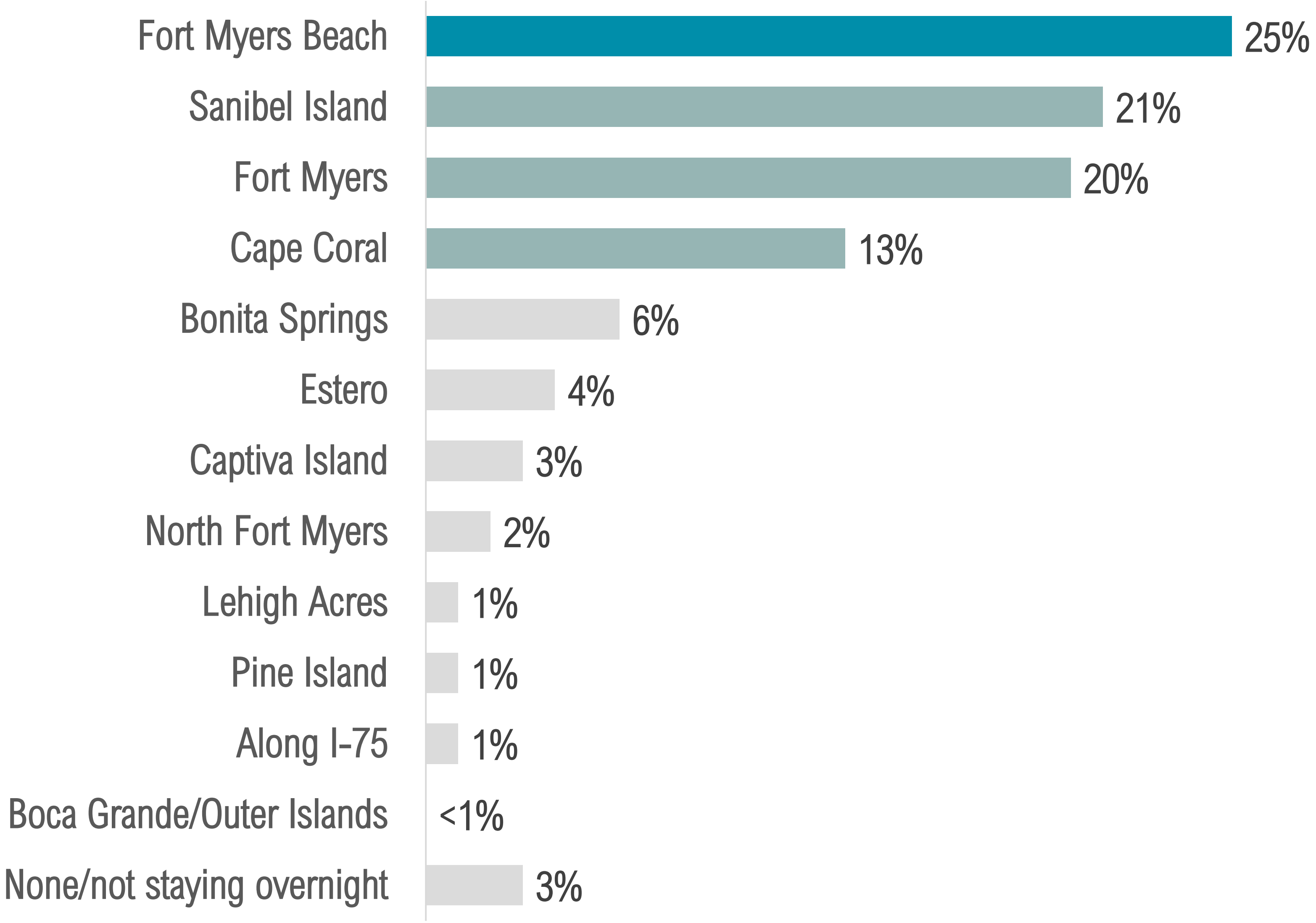
[1]Three responses permitted.
[2]Multiple responses permitted.

ATTRACTIONS VISITED[1]



[1]Multiple responses permitted.

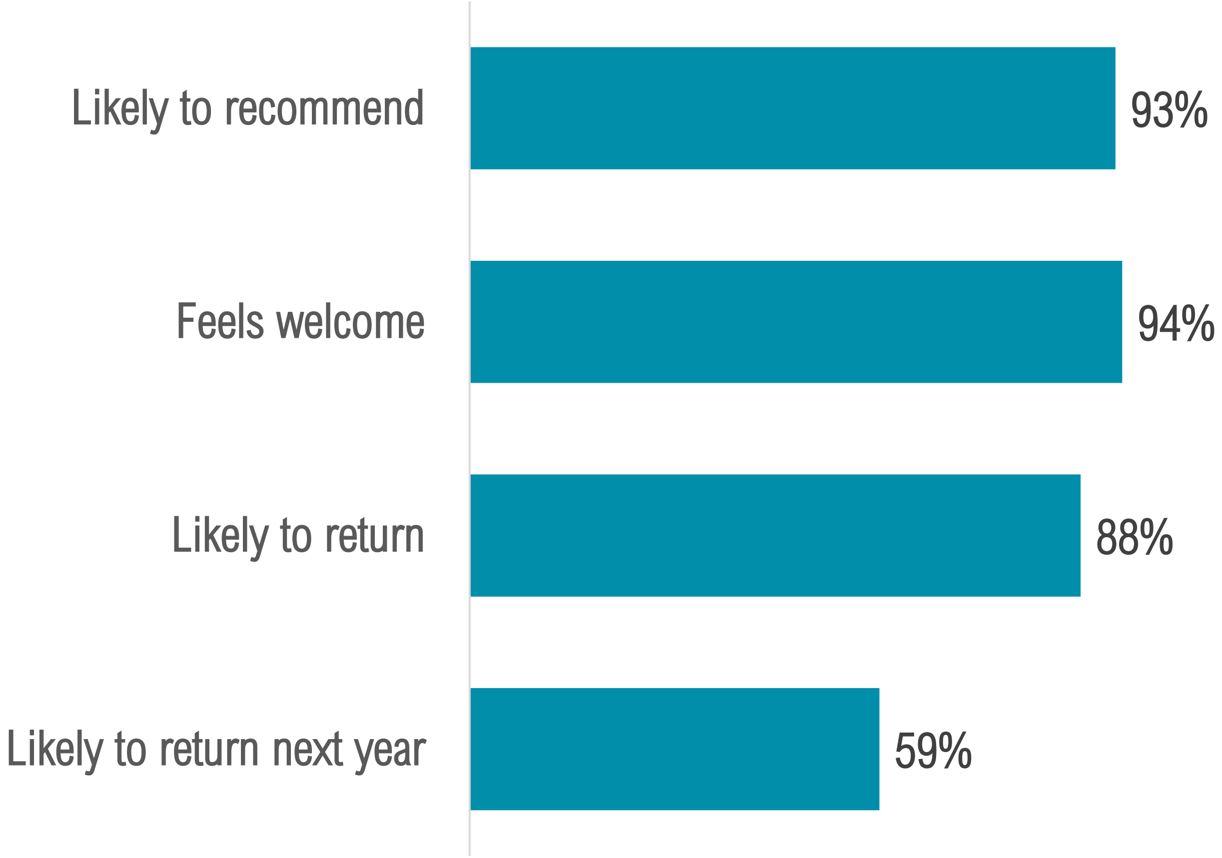
COMMUNITY STAYED



VISITOR JOURNEY: POST-TRIP EVALUATION

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

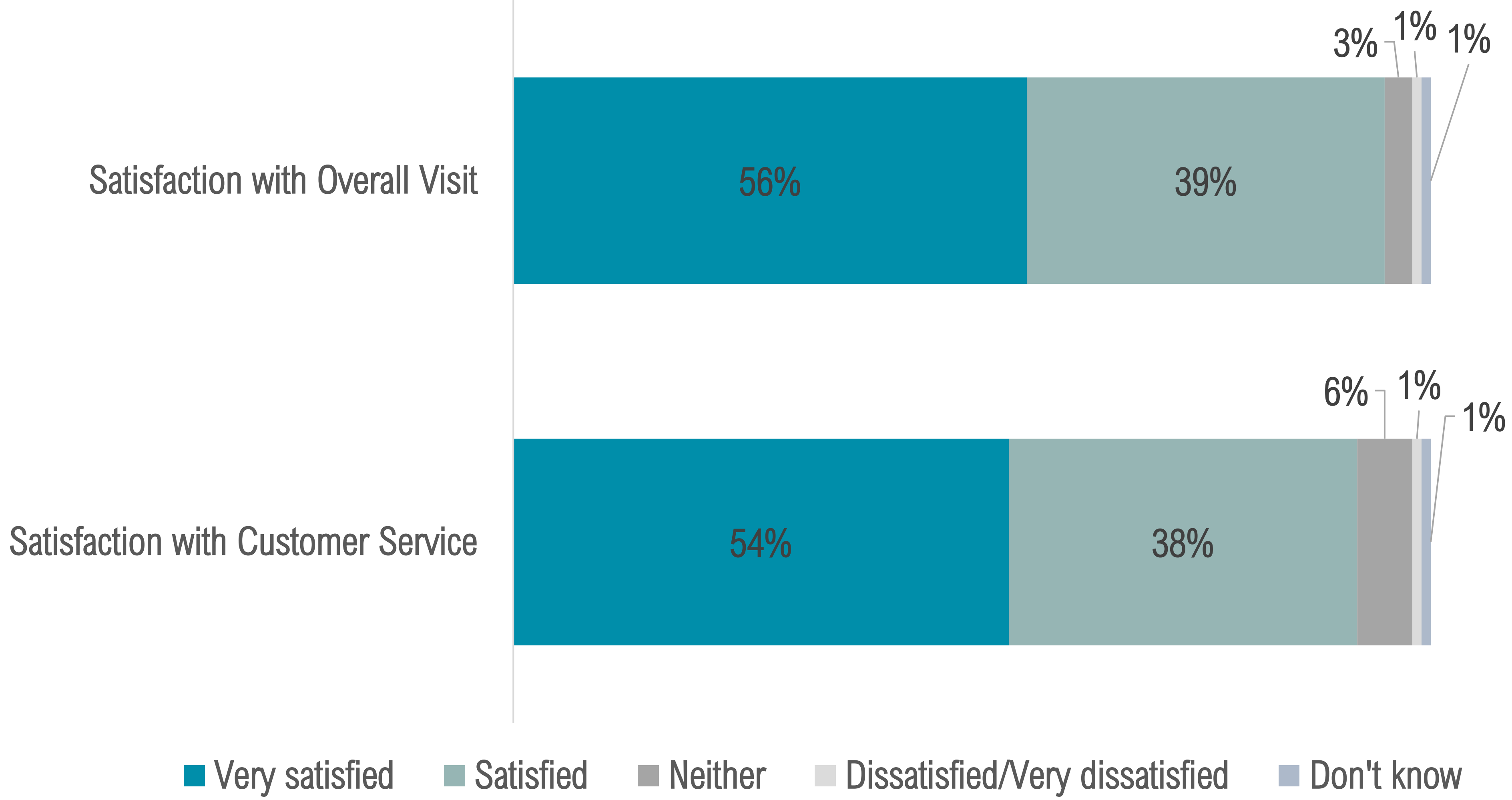
SATISFACTION



SATISFACTION RATINGS

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2021	2022	2021	2022	2021	2022	2021	2022
Likely to Recommend	91%	91%	97%	96%	95%	94%	96%	95%
Likely to Return	81%	77%	94%	93%	91%	88%	84%	83%
Likely to Return Next Year	35%	36%	66%	71%	57%	59%	44%	57%

SATISFACTION



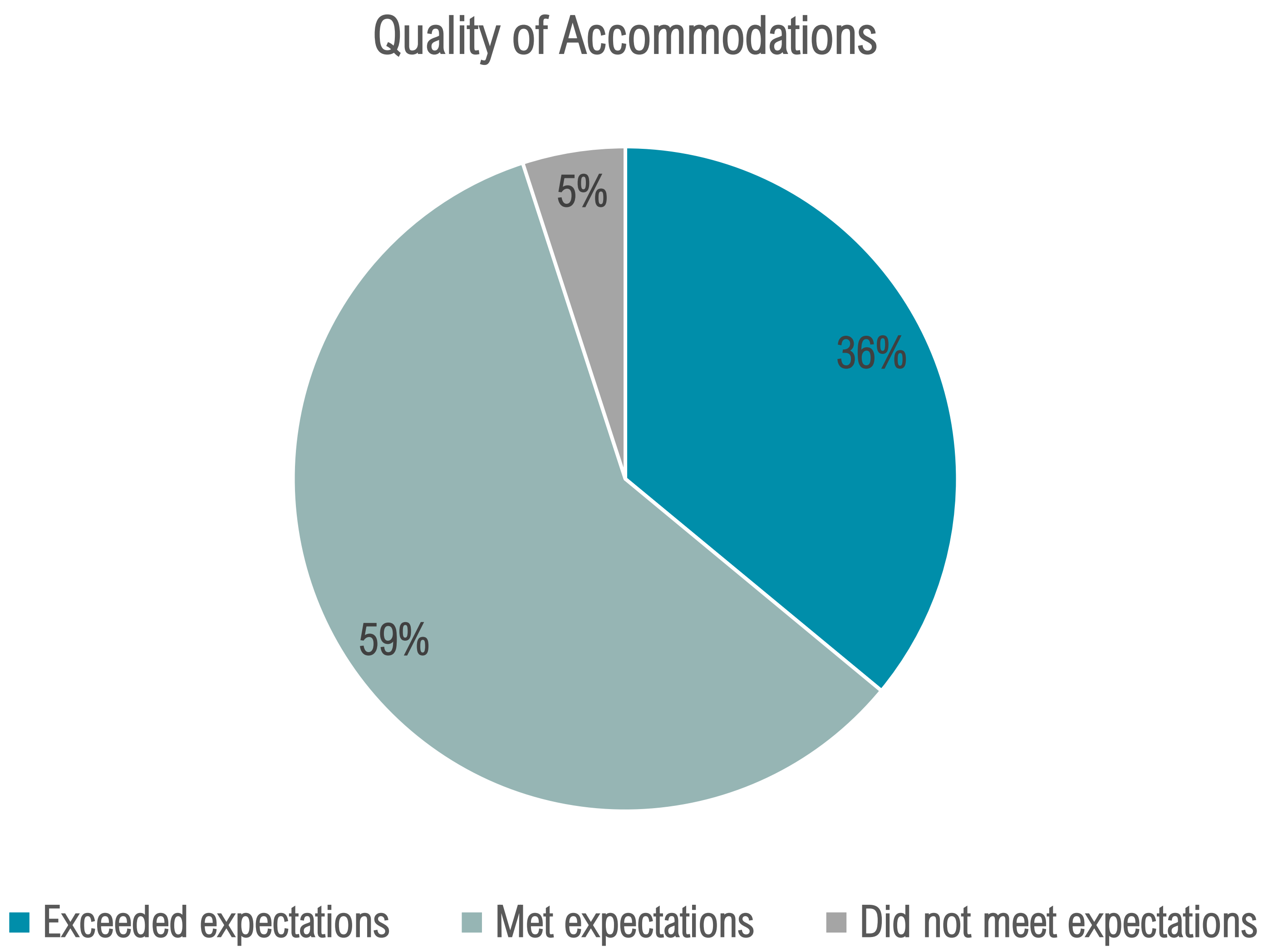
SATISFACTION RATINGS: OVERALL VISIT

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2021	2022	2021	2022	2021	2021	2021	2022
Very Satisfied	59%	46%	74%	65%	70%	57%	56%	56%
Satisfied	35%	48%	24%	32%	27%	38%	40%	41%

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%	48%	63%	61%	62%	56%	51%	52%
Satisfied	35%	41%	29%	32%	31%	36%	38%	40%

SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

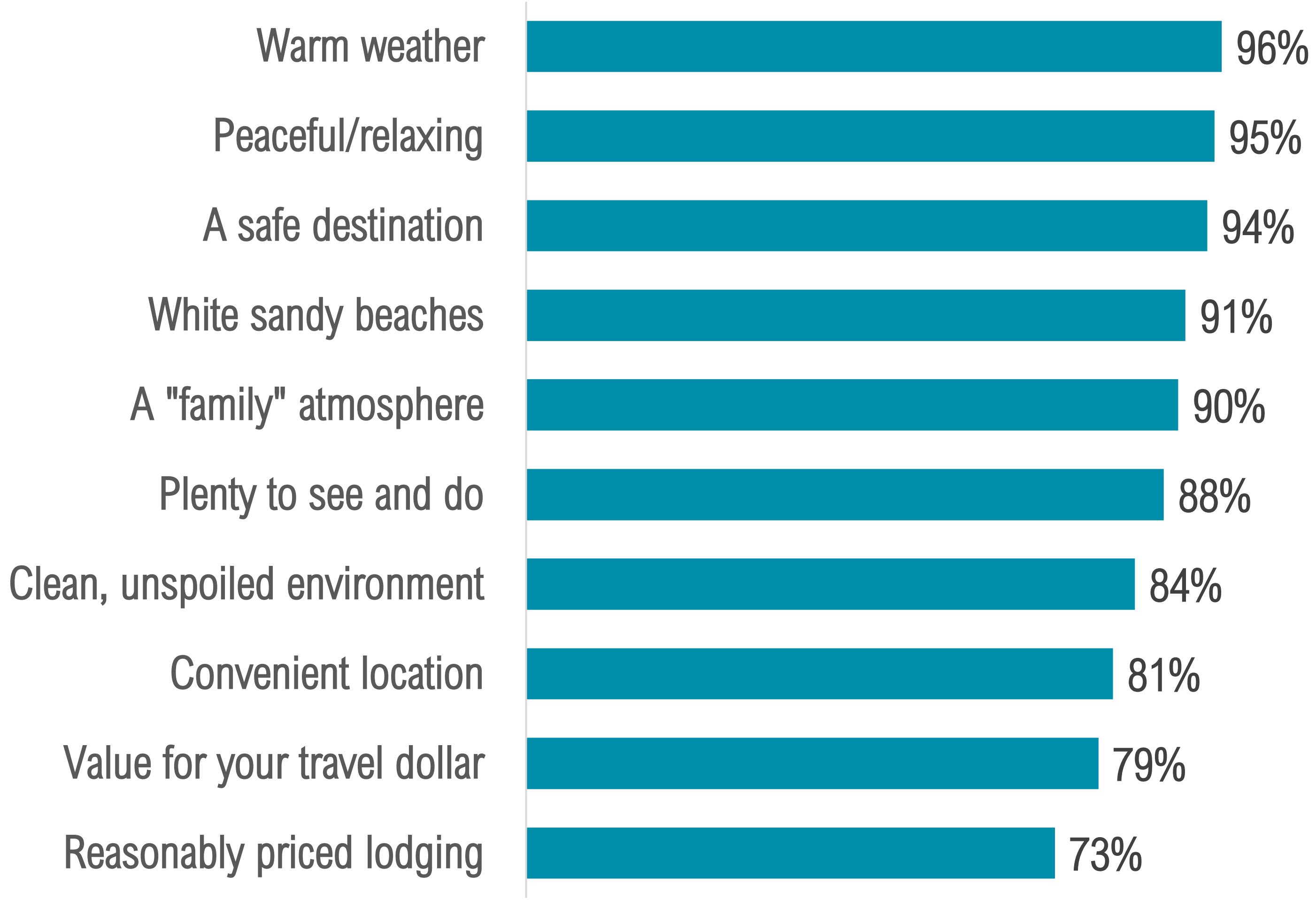


SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2021	2022	2021	2022	2021	2022	2021	2022
Exceeded Expectations	40%	39%	43%	39%	41%	37%	37%	44%
Met Expectations	55%	56%	54%	58%	55%	58%	56%	52%
Did Not Meet Expectations	5%	5%	4%	3%	4%	4%	7%	4%

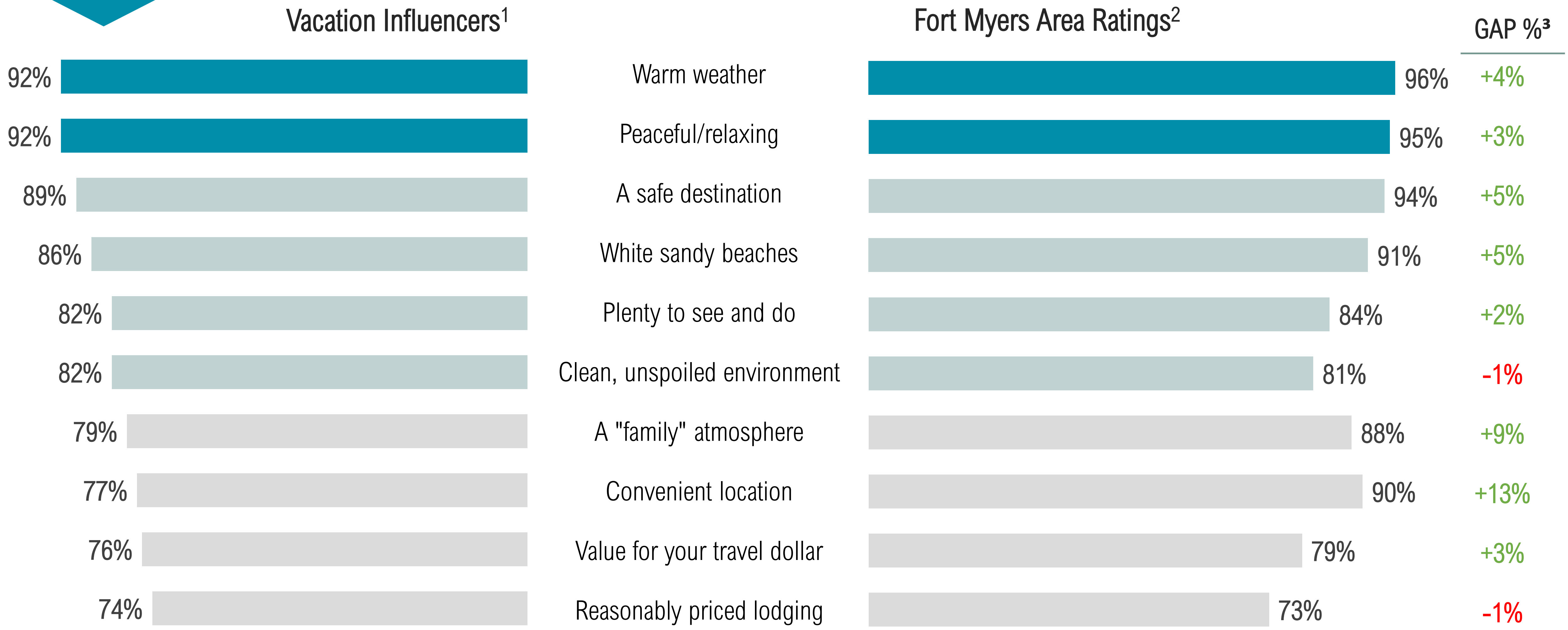
ATTRIBUTE RATINGS[1]

90% or more of visitors gave high experience ratings for warm weather, peacefulness, and safety in the Fort Myers area.



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

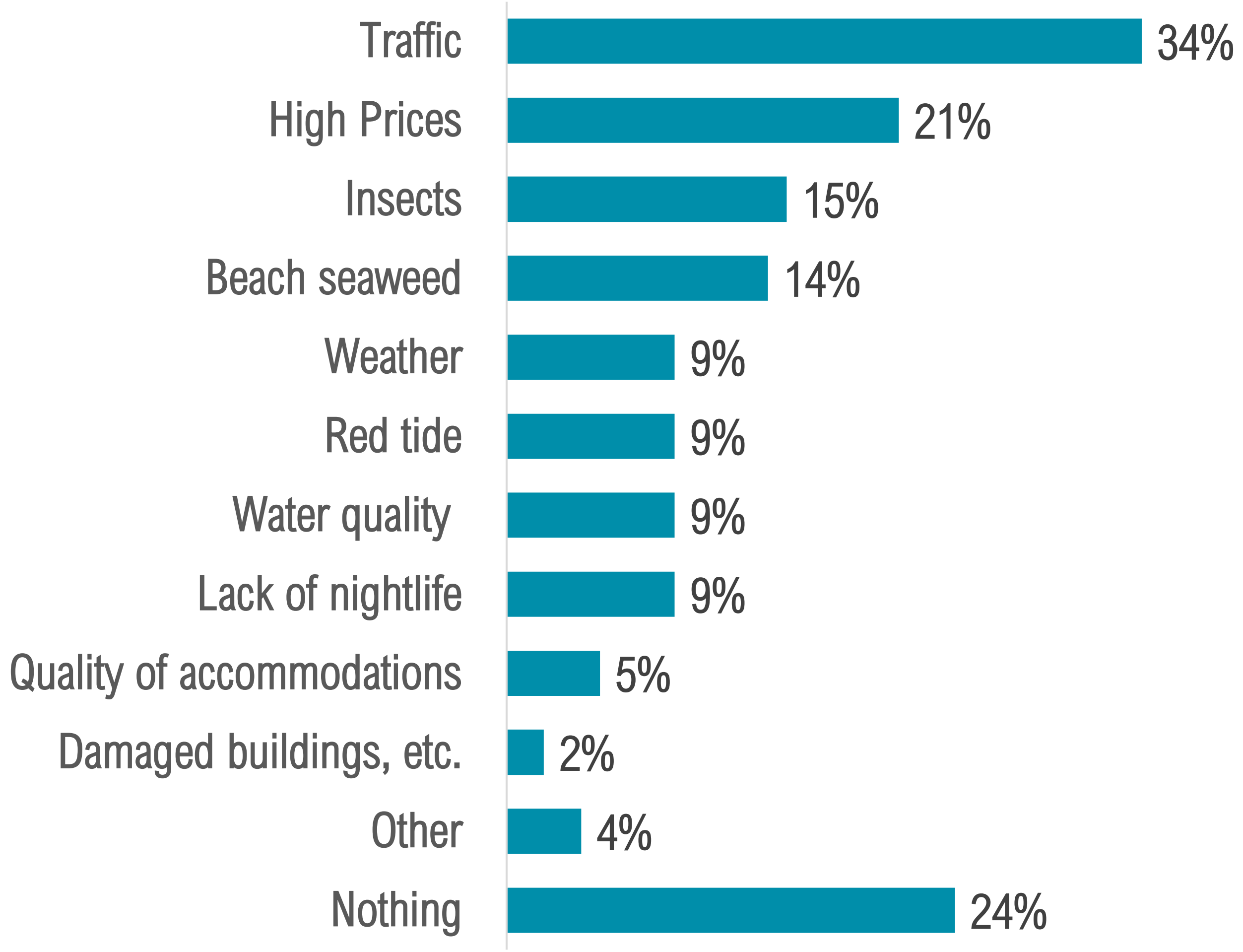
VACATION ATTRIBUTE INFLUENCE VS. RATINGS



[1]Top 2 box scores. Attributes rated on a scale from 1 to 5 where 1 is Not at All Influential and 5 is Definitely Influential.
[2]Top 2 box scores. Attributes rated on a scale from 1 to 5 where 1 is Poor and 5 is Excellent.
[3]Gap is the difference between Fort Myers Area Ratings and the score for Vacation Influencers. A positive GAP is preferred.

VISITOR CONCERNS[1]

1 in 3 visitors were concerned about traffic, and 1 in 5 were concerned about high prices.



[1]Multiple responses permitted.

AREA DESCRIPTIONS

Warm Weather

- "Gorgeous coastline and beaches, great tropical weather, and family oriented. We loved our vacation here and will return next year."
- "Beautiful weather, gorgeous sunsets, great restaurants, we would recommend it to anyone."
- "The children loved playing in the sand and water. The weather was perfect all week. We really loved watching the sunsets."
- "Our favorite annual vacation. Great weather, gorgeous beach sunsets, and terrific restaurants."

Peaceful & Relaxing

- "A peaceful and relaxing family atmosphere that is also tons of fun."
- "Would love to come back next year, if possible, such a relaxing and peaceful yet memorable vacation."
- "A piece of paradise in the US. The island of Sanibel has a feeling of pride and community. A peaceful and relaxing island that I will revisit. Sanibel is now my favorite place in Florida."
- "Lots of options for food and things to do, or it's really easy to just grab a beach chair to sit outside and relax."

AREA DESCRIPTIONS

A Safe Destination

- “Awesome vacation destination with great weather and a lot to do in a safe environment.”
- “We had a great vacation. It’s beautiful with great restaurants, it’s safe, and it’s fun for the whole family.”
- “A perfect place for fun and to make memories while in a safe environment.”
- “A very relaxing and safe place with fantastic weather.”
- “Quiet and safe. No party areas [near where we stayed]. It’s great for the kids.”

White Sandy Beaches

- “A beautiful destination for the whole family. A place to relax and enjoy the clear blue water and the gorgeous white sand.”
- “The beaches of Fort Myers are very different than back home. The sand is soft and white, and the weather is amazing.”
- “Palm trees, white sandy beaches, and great golf courses too.”
- “Super fun vacation with perfect weather, beautiful white sandy beaches, and unbelievable sunsets over the Gulf of Mexico.”

Year-Over-Year Comparisons

ECONOMIC IMPACT

Visitor & Lodging Statistics	2021	2022	% Change
Visitors	4,687,500	4,436,000	- 5.4%
Visitor Days	27,818,107	28,283,981	+ 1.7%
Room Nights	6,394,800	6,270,500	- 1.9%
Direct Expenditures	$3,729,946,900	$4,138,350,100	+ 10.9%
Total Economic Impact	$5,945,535,400	$6,592,391,700	+10.9%
Occupancy	69.5%	67.2%	- 3.4%
ADR	$158.51	$182.64	+ 15.2%
RevPAR	$110.20	$122.69	+ 11.3%
TDT	$57,528,800	$60,902,400	+ 5.9%

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM

	2021	2022	% Change
Direct Jobs	50,133	53,330	+ 6.4%
Total Jobs[1]	69,174	73,564	+ 6.3%
Direct Wages	$1,122,994,700	$1,229,254,000	+ 9.5%
Total Wages[1]	$1,844,217,000	$2,049,290,100	+ 11.1%
Direct Local Taxes	$113,763,300	$126,244,100	+ 11.0%
Total Local Taxes[1]	$200,959,100	$220,011,400	+ 9.5%
Direct State Taxes	$265,199,200	$294,608,000	+ 11.1%
Total State Taxes[1]	$389,432,400	$429,069,200	+ 10.2%

[1]"Total" wages and taxes are greater than "direct" wages and taxes because visitors direct spending is recirculated throughout the Lee County economy as employees and employers buy products and services with visitors' dollars.

VISITOR TYPE

Visitor Type	2021	2022
Visitors in Paid Accommodations	73%	72%
Visitors in Non-Paid Accommodations	24%	25%
Day Trippers	3%	3%

PRE-VISIT

Planned trip in advance	2021	2022
1 week or less	5%	5%
2-4 weeks	12%	14%
1-2 months	31%	33%
3-6 months	31%	29%
6 months or more	20%	18%
Not sure	1%	1%

Considered Other Destinations	2021	2022
Yes	26%	37%
No	74%	63%

PRE-VISIT

Trip Planning Websites[1]	2021	2022
Online search engines	26%	33%
Airline websites/apps	26%	27%
Airbnb, VRBO, HomeAway etc.	28%	24%
Vacation rental websites/apps	18%	19%
Booking websites	19%	19%
Traveler reviews, blogs, stories	13%	18%
Hotel websites/apps	16%	16%
Trip Advisor	17%	14%
Visit Florida	7%	11%
VCB Social Media	9%	10%
Facebook	7%	9%
www.VisitFortMyers.com	8%	9%
Instagram	4%	5%
YouTube, Hulu, Pandora	4%	4%
Other	5%	4%
None	17%	16%

[1]Multiple responses permitted.

PRE-VISIT

Information Requests[1]	2021	2022
Calling a hotel, motel, or condo	26%	31%
Requesting and receiving a visitor guide	9%	12%
Calling the VCB	5%	6%
Receiving the VCB e-newsletter	4%	4%
Calling a local Chamber of Commerce	10%	3%
Other	3%	3%
None	63%	55%

[1]Multiple responses permitted.

PRE-VISIT

Reason for Visiting	2021	2022
Beach	53%	51%
Relax & unwind	43%	38%
Visiting friends & relatives	18%	20%
Nature, environment, bird watching	9%	7%
Fishing	7%	6%
Shopping	4%	6%
Special occasion	6%	5%
Water sports	8%	5%
Biking, hiking	5%	4%
Golf or tennis	4%	4%
Attractions	3%	3%
Photography	4%	3%
Volunteering	1%	3%
Special event	3%	2%
Sporting event	2%	2%
Business meetings/conferences	2%	2%
Culture	2%	2%
Museums, history	2%	2%
Work-related hurricane recovery	-	2%
Checking-in on my property post-hurricane	-	2%
Diving, snorkeling	2%	1%
Guided tours	2%	1%
Part-time resident ("Snowbird")	-	<1%
Other	5%	4%

PRE-VISIT

Recall of Lee County Promotions	2021	2022
Yes	38%	48%

Influenced by Promotions	2021	2022
Yes	-	26%

Characteristics influencing decision to visit Lee County (top 2 boxes)	2021	2022
Warm weather	92%	92%
Peaceful/relaxing	92%	92%
A safe destination	89%	89%
White sandy beaches	87%	86%
Plenty to see and do	80%	82%
Clean, unspoiled environment	86%	82%
A "family" atmosphere	77%	79%
Convenient location	81%	77%
Value for your travel dollar	76%	76%
Reasonably priced lodging	74%	74%

PRE-VISIT

Transportation	2021	2022
Fly	76%	70%
Drive a personal vehicle	20%	25%
Drive a rental vehicle	2%	3%
Drive a RV	1%	1%
Travel by bus	1%	<1%
Other	<1%	1%

Airport Used	2021	2022
Southwest Florida International	82%	83%
Punta Gorda	8%	7%
Ft. Lauderdale international	3%	4%
Miami International	2%	2%
Tampa International	2%	2%
Orlando International	2%	1%
Other	1%	1%

TRAVEL PARTY PROFILE

Visitor Origin	2021	2022
Florida	13%	14%
Southeast	17%	17%
Northeast	17%	16%
Midwest	39%	36%
West	7%	7%
Canada	3%	5%
United Kingdom	1%	1%
Germany	1%	2%
Other Europe	1%	1%
Other international	1%	1%

Visitor Origin	2021	2022
Miami-Ft Lauderdale	5%	5%
Tampa-St. Petersburg	4%	4%
Chicago	4%	4%
New York	4%	4%
Minneapolis-St. Paul	4%	3%
Cleveland-Akron	3%	3%
Atlanta	3%	3%
Boston	2%	3%
Cincinnati	2%	3%

[1]Sources: Data from Visitor Tracking Survey and Arrivalist

fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

downs & st. germain RESEARCH

TRAVEL PARTY PROFILE

Travel Parties	2021	2022
Mean travel party size	3.5[1]	3.2[1]
Travel with children under age 18	38%	40%

Travel Party Composition	2021	2022
Family	47%	47%
Couple	33%	32%
Solo traveler	7%	9%
With other couples/friends	11%	9%
With business associates	1%	2%
In a tour group	1%	1%

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

TRAVEL PARTY PROFILE

Marital Status	2021	2022
Married	74%	71%
Unmarried	26%	29%

Age	2021	2022
Average age	50	50

Household Income	2021	2022
Median Income	$106,000	$109,600

ACCOMMODATIONS

Lodging Accommodations	2021	2022
Condo/Vacation rental	41%	35%
Hotel/Motel/Resort/B&B	30%	35%
Non-paid accommodations	24%	25%
Day tripper	3%	3%
RV Park/Campground	2%	2%

TRIP EXPERIENCE

Length of Stay[1]	2021	2022
Average nights in the Fort Myers area	6.9	6.6

First time/Repeat Visitors	2021	2022
First-time	32%	36%
Repeat	68%	64%

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

TRIP EXPERIENCE

Activities[1]	2021	2022
Relax and unwind	69%	67%
Beach	74%	65%
Restaurants	55%	56%
Shopping	37%	41%
Visit friends/relatives	30%	34%
Water sports	29%	27%
Nature, environment, bird watching	30%	26%
Biking, hiking	23%	25%
Fishing	23%	23%
Bars, nightclubs	15%	16%
Photography	13%	12%
Attractions	13%	11%
Golf, tennis, or pickleball	10%	11%
Museums, history	7%	8%
Culture	6%	7%
Diving, snorkeling	7%	7%
Special events	5%	6%
Guided tours	8%	6%
Special occasion	6%	5%
Spas	4%	5%
Attend or participate in a sporting event	4%	4%
Volunteering	1%	3%
Business meetings/conferences	2%	2%
Other	3%	2%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Attractions[1]	2021	2022
Beaches	75%	66%
Fort Myers Beach Pier	34%	36%
Sanibel Lighthouse	31%	26%
Edison & Ford Winter Estates	15%	19%
Sanibel Outlets	18%	18%
Shell Factory and Nature Park	12%	15%
Miromar Outlets Mall	11%	15%
Bell Tower Shops	11%	15%
Gulf Coast Town Center	10%	14%
Coconut Point Mall	10%	14%
J.N. Ding Darling National Wildlife Refuge	17%	13%
Periwinkle Place	17%	12%
Bailey-Matthews Shell Museum	8%	7%
Manatee Park	5%	5%
Broadway Palm Dinner Theater	2%	3%
Barbara B. Mann Performing Arts Hall	2%	2%
Other	5%	6%
None	7%	7%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Area stayed	2021	2022
Fort Myers Beach	26%	25%
Sanibel Island	29%	21%
Fort Myers	13%	20%
Cape Coral	13%	13%
Bonita Springs	5%	6%
Estero	2%	4%
Captiva Island	4%	3%
North Fort Myers	1%	2%
Lehigh Acres	1%	1%
Pine Island	1%	1%
Along I-75	1%	1%
Boca Grande/Outer Islands	1%	<1%
None/not staying overnight	3%	3%

POST-TRIP EVALUATION

Loyalty metrics	2021	2022
Likely to recommend	96%	93%
Likely to return	89%	88%
Likely to return next year	59%	59%

Satisfaction with Accommodations	2021	2022
Exceeded expectations	41%	36%
Met expectations	55%	59%
Did not meet expectations	4%	5%

POST-TRIP EVALUATION

Satisfaction with Visit	2021	2022
Very satisfied	69%	56%
Satisfied	28%	39%
Neither	2%	3%
Dissatisfied/Very dissatisfied	1%	1%
Don't know	0%	1%

Satisfaction with Customer Service	2021	2022
Very satisfied	63%	54%
Satisfied	30%	38%
Neither	4%	6%
Dissatisfied/Very dissatisfied	2%	1%
Don't know	1%	1%

POST-TRIP EVALUATION

Visitor Concerns[1]	2021	2022
Traffic	25%	34%
High Prices	20%	21%
Insects	17%	15%
Beach seaweed	21%	14%
Weather	11%	9%
Red tide	12%	9%
Water quality	10%	9%
Lack of nightlife	9%	9%
Quality of accommodations	8%	5%
Damaged buildings, signs, and landscapes	-	2%
Other	5%	4%
Nothing	25%	24%

[1]Multiple responses permitted.

Quarterly Comparisons

ECONOMIC IMPACT

Visitor & Lodging Statistics	January – March	April – June	July – September	October – December
Visitors	1,126,500	1,477,100	1,199,100	633,300
Visitor Days	8,776,727	8,330,844	6,211,338	4,965,072
Room Nights	1,985,900	1,748,800	1,457,300	1,078,500
Direct Expenditures	$1,410,763,600	$1,206,349,700	$854,982,500	$666,254,300
Total Economic Impact	$2,247,346,400	$1,921,715,100	$1,361,987,100	$1,061,343,100
Occupancy	90.0%	68.4%	55.2%	55.1%
ADR	$235.29	$190.79	$151.82	$152.64
RevPAR	$211.84	$130.50	$83.80	$84.10

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM

	January – March	April – June	July – September	October – December
Direct Jobs	18,227	15,600	10,961	8,542
Total Jobs[1]	25,138	21,500	15,133	11,793
Direct Wages	$415,573,800	$355,358,800	$257,590,900	$200,730,500
Total Wages[1]	$683,756,400	$584,682,900	$438,862,500	$341,988,300
Direct Local Taxes	$43,451,500	$37,155,500	$25,649,500	$19,987,600
Total Local Taxes[1]	$74,836,700	$63,993,100	$45,626,600	$35,555,000
Direct State Taxes	$100,587,400	$86,012,700	$60,703,800	$47,304,100
Total State Taxes[1]	$146,526,900	$125,295,800	$88,259,200	$68,987,300

[1]"Total" wages and taxes are greater than "direct" wages and taxes because visitors direct spending is recirculated throughout the Lee County economy as employees and employers buy products and services with visitors' dollars.

VISITOR TYPE

Visitor Type	January – March	April – June	July – September	October –December
Visitors in Paid Accommodations	73%	73%	76%	59%
Visitors in Non-Paid Accommodations	25%	24%	22%	38%
Day Trippers	2%	3%	2%	3%

PRE-VISIT

Planned trip in advance	January – March	April – June	July –September	October – December
1 week or less	5%	6%	4%	8%
2-4 weeks	17%	16%	7%	16%
1-2 months	29%	31%	42%	26%
3-6 months	24%	28%	34%	30%
6 months or more	23%	18%	12%	17%
Not sure	2%	1%	1%	3%

Considered Other Destinations	January – March	April – June	July – September	October – December
Yes	38%	29%	54%	22%
No	62%	71%	46%	78%

PRE-VISIT

Trip Planning Websites[1]	January – March	April – June	July – September	October – December
Online search engines	34%	31%	38%	26%
Airbnb, VRBO, HomeAway etc.	24%	25%	24%	19%
Airline websites/apps	23%	24%	34%	29%
Trip Advisor	18%	14%	13%	12%
Hotel websites/apps	18%	17%	12%	17%
Vacation rental websites/apps	18%	22%	19%	11%
Traveler reviews, blogs, stories	18%	18%	22%	10%
Booking websites	16%	20%	20%	17%
Visit Florida	8%	11%	14%	9%
www.VisitFortMyers.com	8%	12%	8%	9%
Facebook	7%	8%	11%	8%
Instagram	6%	4%	7%	4%
VCB Social Media	6%	13%	9%	9%
YouTube, Hulu, Pandora	5%	4%	3%	3%
Other	5%	18%	7%	24%
None	17%	4%	3%	4%

[1]Multiple responses permitted.

PRE-VISIT

Information Requests[1]	Jan – Mar	Apr – Jun	Jul –Sep	Oct – Dec
Calling a hotel, motel, condo	32%	27%	41%	23%
Requesting and receiving a visitor guide	11%	12%	14%	9%
Calling the VCB	5%	4%	10%	3%
Receiving the VCB e-newsletter	5%	4%	3%	4%
Calling a local Chamber of Commerce	4%	2%	3%	3%
Other	4%	2%	2%	2%
None	58%	63%	36%	66%

[1]Multiple responses permitted.

PRE-VISIT

Characteristics influencing decision to visit Lee County (top 2 boxes)	January – March	April – June	July –September	October – December
Warm weather	94%	93%	91%	85%
Peaceful/relaxing	91%	94%	96%	82%
A safe destination	87%	91%	93%	79%
White sandy beaches	86%	90%	91%	65%
Clean, unspoiled environment	81%	87%	86%	68%
Plenty to see and do	79%	84%	87%	72%
Convenient location	77%	81%	76%	67%
A "family" atmosphere	74%	82%	84%	69%
Value for your travel dollar	70%	78%	84%	67%
Reasonably priced lodging	66%	78%	83%	60%

PRE-VISIT

Recall of Lee County Promotions	January – March	April – June	July –September	October – December
Yes	48%	45%	55%	40%

Source of Recalled Promotions	January – March	April – June	July –September	October – December
Internet	44%	42%	66%	46%
Social media	32%	35%	36%	34%
Traveler reviews, blogs	24%	23%	34%	20%
Television	19%	14%	8%	16%
Travel/visitor guide	13%	13%	7%	8%
Magazine	8%	9%	6%	6%
Newspaper	7%	7%	2%	7%
www.VisitFortMyers.com	6%	12%	7%	10%
Radio	5%	5%	2%	6%
Brochure	5%	7%	5%	4%
AAA	5%	6%	5%	5%
Billboard	4%	3%	3%	2%
Deal-based promotion	4%	4%	3%	4%
Other	5%	3%	2%	5%

PRE-VISIT

Transportation	January – March	April – June	July – September	October – December
Fly	73%	66%	78%	61%
Drive a personal vehicle	23%	31%	18%	28%
Drive a rental vehicle	2%	2%	2%	8%
Drive a RV	1%	1%	1%	2%
Travel by bus	<1%	<1%	1%	<1%
Other	1%	<1%	<1%	1%

Airport Used	January – March	April – June	July – September	October – December
Southwest Florida International	82%	84%	85%	83%
Punta Gorda	8%	6%	7%	7%
Ft. Lauderdale International	3%	4%	4%	4%
Miami International	2%	2%	1%	2%
Orlando International	2%	2%	1%	1%
Tampa International	2%	1%	2%	2%
Other	1%	1%	<1%	1%

TRAVEL PARTY PROFILE

Visitor Origin	January – March	April – June	July – September	October – December
Florida	4%	16%	14%	16%
Southeast	16%	18%	18%	17%
Northeast	20%	16%	14%	15%
Midwest	47%	33%	34%	32%
West	5%	7%	8%	8%
Canada	4%	4%	7%	5%
United Kingdom	1%	2%	<1%	1%
Germany	1%	2%	2%	3%
Other Europe	1%	1%	2%	1%
Other International	1%	1%	1%	2%

TRAVEL PARTY PROFILE

Visitor Origin	January – March	April – June	July – September	October – December
Minneapolis-St. Paul	7%	3%	1%	3%
Chicago	5%	3%	4%	3%
Detroit	5%	2%	1%	2%
New York	5%	4%	2%	4%
Boston	4%	3%	1%	2%
Miami-Ft Lauderdale	4%	5%	6%	4%
Tampa-St. Petersburg	4%	5%	3%	5%
Cincinnati	3%	2%	3%	2%
Cleveland-Akron	3%	2%	4%	3%
Des Moines-Ames	3%	1%	1%	1%
Grand Rapids-Kalamazoo-Battle Creek	3%	1%	<1%	1%
Milwaukee	3%	2%	<1%	2%
Alpena	2%	<1%	<1%	<1%
Atlanta	2%	3%	3%	3%
Columbus, OH	2%	<1%	1%	1%
Green Bay-Appleton	2%	<1%	1%	<1%
Houston	2%	1%	2%	1%
Indianapolis	2%	1%	1%	2%
Jacksonville	2%	2%	2%	1%
Louisville	2%	1%	2%	1%
Orlando-Daytona Beach-Melbourne	2%	3%	2%	3%
Philadelphia	2%	1%	1%	2%
Pittsburgh	2%	1%	1%	2%
Saint Louis	2%	1%	<1%	1%
Washington, DC-Hagerstown	2%	1%	2%	2%
Denver	1%	1%	2%	2%
Nashville	1%	2%	1%	1%
Naples & Surrounding Areas	<1%	2%	<1%	2%
West Palm Beach-Ft Pierce	<1%	2%	1%	1%

TRAVEL PARTY PROFILE

Travel Parties	January – March	April – June	July – September	October – December
Mean travel party size[1]	3.5	3.2	3.2	2.8
Travel with children under age 18	27%	41%	56%	31%

Travel Party Composition	January – March	April – June	July – September	October – December
Family	42%	44%	64%	32%
Couple	36%	34%	24%	34%
Group of couples/friends	12%	11%	7%	6%
Solo traveler	8%	8%	4%	21%
With business associates	1%	1%	1%	6%
In a tour group	1%	1%	<1%	<1%
Other	<1%	1%	<1%	1%

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

TRAVEL PARTY PROFILE

Marital Status	January – March	April – June	July – September	October – December
Married	71%	73%	69%	72%
Unmarried	29%	27%	31%	28%

Age	January – March	April – June	July – September	October – December
Median age	52	50	44	50

Household Income	January – March	April – June	July – September	October – December
Median Income	$112,500	$108,300	$108,600	$108,800

TRIP EXPERIENCE

Length of Stay	January – March	April – June	July – September	October – December
Average nights stayed in the Fort Myers Area	8.8	5.6	5.2	7.8

First time/Repeat Visitors	January – March	April – June	July – September	October – December
First-time	35%	36%	42%	26%
Repeat	65%	64%	58%	74%

TRIP EXPERIENCE

Activities[1]	January – March	April – June	July – September	October – December
Beach	72%	77%	65%	26%
Relax and unwind	67%	71%	64%	61%
Restaurants	54%	54%	53%	69%
Visit friends/relatives	38%	31%	25%	49%
Shopping	37%	41%	42%	49%
Nature, environment, bird watching	28%	27%	26%	19%
Water sports	28%	27%	34%	14%
Biking, hiking	27%	28%	22%	19%
Fishing	21%	23%	28%	18%
Bars, nightclubs	18%	17%	12%	20%
Attractions	14%	13%	6%	10%
Golf, tennis, or pickleball	12%	11%	8%	17%
Photography	12%	16%	8%	11%
Museums, history	9%	10%	3%	8%
Special events	8%	5%	3%	8%
Culture	7%	8%	3%	9%
Guided tours	7%	7%	5%	4%
Attend or participate in a sporting event	5%	4%	3%	3%
Diving, snorkeling	5%	7%	11%	6%
Special occasion	4%	5%	4%	8%
Spas	4%	4%	8%	6%
Business meetings/conferences	2%	3%	1%	5%
Volunteering	1%	1%	1%	13%
Other	3%	2%	1%	2%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Attractions[1]	January – March	April – June	July – September	October – December
Beaches	72%	79%	64%	32%
Fort Myers Beach Pier	41%	43%	42%	0%
Sanibel Lighthouse	29%	31%	31%	0%
Edison & Ford Winter Estates	21%	16%	17%	25%
J.N. Ding Darling National Wildlife Refuge	17%	16%	13%	0%
Sanibel Outlets	17%	20%	22%	0%
Shell Factory and Nature Park	15%	14%	17%	16%
Coconut Point Mall	14%	11%	12%	26%
Bell Tower Shops	13%	12%	15%	28%
Miromar Outlets Mall	12%	13%	9%	38%
Gulf Coast Town Center	12%	10%	12%	30%
Periwinkle Place	12%	16%	14%	0%
Bailey-Matthews Shell Museum	9%	7%	7%	0%
Manatee Park	6%	5%	3%	7%
Broadway Palm Dinner Theater	3%	3%	1%	5%
Barbara B. Mann Performing Arts Hall	2%	2%	1%	2%
Other	4%	7%	5%	7%
None	5%	5%	3%	22%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Area stayed	January – March	April – June	July – September	October – December
Fort Myers Beach	29%	21%	36%	7%
Sanibel Island	22%	25%	27%	1%
Cape Coral	16%	13%	11%	13%
Fort Myers	13%	20%	11%	48%
Bonita Springs	5%	6%	5%	12%
Captiva Island	4%	3%	3%	<1%
Estero	3%	4%	3%	7%
North Fort Myers	2%	2%	1%	5%
Lehigh Acres	1%	1%	1%	1%
Pine Island	1%	1%	<1%	<1%
Boca Grande/Outer Islands	1%	<1%	<1%	1%
Along I-75	1%	1%	<1%	2%
None/not staying overnight	2%	3%	2%	3%

POST-TRIP EVALUATION

Loyalty metrics	January – March	April – June	July – September	October – December
Likely to recommend	95%	95%	93%	87%
Likely to return	91%	87%	87%	85%
Likely to return next year	58%	59%	56%	66%

Satisfaction with Accommodations	January – March	April – June	July – September	October – December
Exceeded expectations	34%	39%	36%	36%
Met expectations	61%	57%	57%	61%
Did not meet expectations	5%	4%	7%	3%

POST-TRIP EVALUATION

Satisfaction with Visit	January – March	April – June	July – September	October – December
Very satisfied	58%	62%	51%	48%
Satisfied	38%	35%	43%	42%
Neither	2%	2%	4%	8%
Dissatisfied/Very dissatisfied	1%	1%	2%	1%
Don't know	1%	0%	0%	1%

Satisfaction with Customer Service	January – March	April – June	July – September	October – December
Very satisfied	55%	59%	49%	48%
Satisfied	37%	34%	42%	40%
Neither	5%	5%	5%	9%
Dissatisfied/Very dissatisfied	1%	1%	3%	0%
Don't know	2%	1%	1%	3%

POST-TRIP EVALUATION

Visitor Concerns[1]	January – March	April – June	July – September	October – December
Traffic	47%	36%	19%	37%
High Prices	19%	19%	30%	15%
Red tide	16%	6%	4%	10%
Insects	13%	17%	17%	12%
Beach seaweed	11%	20%	14%	3%
Water quality	10%	10%	5%	11%
Weather	8%	9%	9%	8%
Lack of nightlife	8%	7%	15%	4%
Quality of accommodations	6%	5%	7%	2%
Damaged buildings, etc.	-	-	-	11%
Other	4%	6%	2%	<1%
Nothing	21%	25%	26%	21%

[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: 3,591 completed interviews
    - Target individuals: Calendar Year 2022 visitors to Lee County
    - Data Collection: January 2022 – December 2022
  - Occupancy Study
    - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc., and the STR Report
    - Sample Size – quarterly survey data from 7,303 hotel/rental/campground units (89 properties) reporting to DSG, 10,384 hotel units (90 properties) reporting to STR, and 2,892 rental units (26 property managers) 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

METHODOLOGY

- **3,591** visitor interviews were completed in the following areas:

828	Fort Myers Beach: The Pier, Times Square
1,307	Fort Myers: Centennial Park, RSW, Edison-Ford Winter Estates, Hampton Inn & Suites Fort Myers
590	Sanibel: Lighthouse Beach, Sanibel Moorings Resort
575	Cape Coral/North Fort Myers: Yacht Club Community Park, The Shell Factory and Nature Park
291	Bonita Springs: Bonita Beach Park

Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

Calendar Year 2022
Visitor Tracking, Occupancy & Economic Impact Study

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fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

downs & st. germain RESEARCH