Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

January - March 2023

Visitor Tracking, Occupancy & Economic Impact Study

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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

January - March 2023

- Due to Hurricane Ian, tourism metrics for the Fort Myers area were still down across the board
- **Occupancy** and **average daily rate** both **decreased significantly**, causing **revenue per available room** to **decrease 35.3%** compared to Jan-Mar 2022
- **Visitation** was **down 34.6%** and **room nights** were **down 30.6%**
  - The drop in room nights was not as steep as the drop in visitation due to an increased length of stay compared to J-M 2022
- The **proportion of visitors** who stayed **in unpaid accommodations remained** at an **elevated** level compared to the same period last year
- Due to the ongoing efforts of recovery workers, volunteers, etc., the **number of visitors who travelled to the Fort Myers area alone or with business associates remained elevated**
- **Significantly more visitors considered other destinations** before choosing the Fort Myers area
- RSW saw a **17.3% decrease in flight passengers** compared to Jan-Mar of 2022

70.9%	$193.35	$137.07
OCCUPANCY RATE	AVERAGE DAILY RATE	REVENUE PER ROOM
↓ 21.2% from 2022	↓ 17.8% from 2022	↓ 35.3% from 2022

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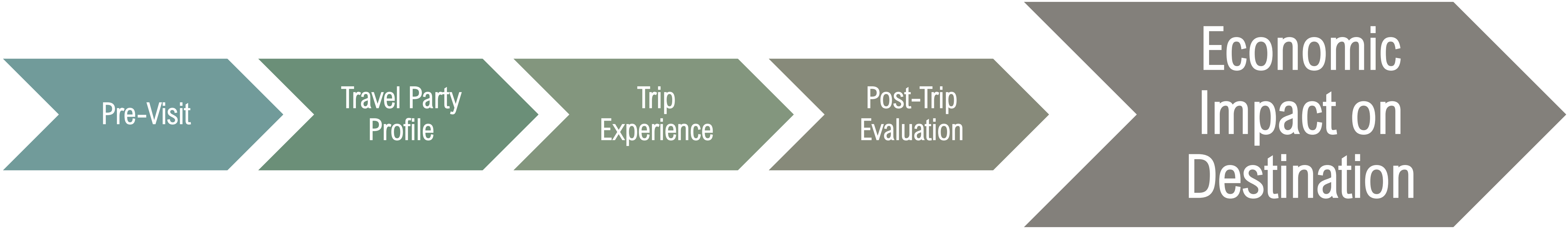
VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION



TOURISM SNAPSHOT: KEY METRICS January – March 2022 VS. 2023

Visitor & Lodging Statistics	Jan - Mar 2022	Jan - Mar 2023	% Change '22-'23
Visitors	1,126,500	736,300	- 34.6%
Visitor Days	8,561,400	6,111,300	- 28.6%
Room Nights	1,985,900	1,378,600	- 30.6%
Direct Expenditures[1]	$1,410,763,600	$967,837,700	- 31.4%
Total Economic Impact[2]	$2,247,346,400	$1,549,508,200	- 31.1%

[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.

January - March LODGING STATISTICS

70.9%	$193.35	$137.07
Occupancy	ADR	RevPAR
↓21.2%	↓17.8%	↓35.3%
From 2022	From 2022	From 2022

VISITOR JOURNEY: PRE-VISIT

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

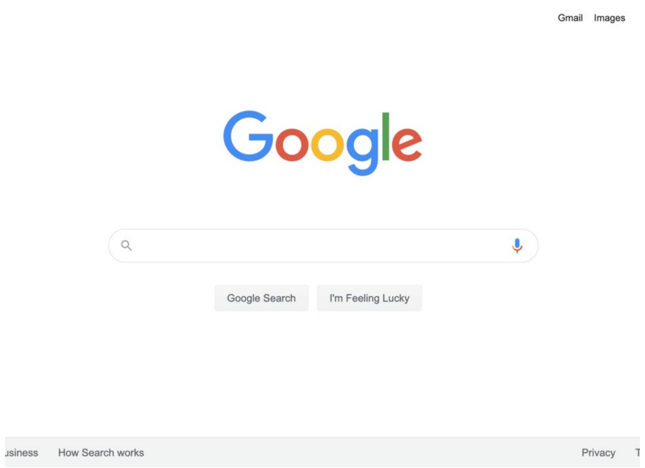
Economic Impact on Destination

TRIP PLANNING

- 1 in 3 visitors planned their trips to the Fort Myers area 1-2 months in advance
- 3 in 10 visitors requested information to plan their trips
  - 1 in 4 called a hotel, motel, or condo when planning their trips
  - 8% requested a visitor guide to help with planning
- 58% of visitors considered choosing other destinations when planning their trips (up from 38% in January – March 2022)

TRIP PLANNING: WEBSITES/APPS USED

- **Nearly 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% Online Search Engines

27% Airline Websites/Apps

airbnb

18% 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]:

88% Warm weather

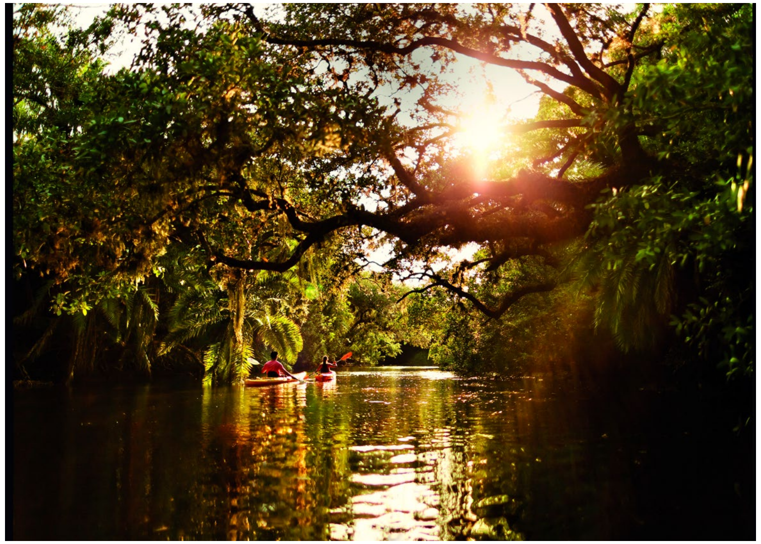
85% Peaceful/relaxing

80% 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]:



33% Relax & unwind

28% Visit friends & relatives

16% Sporting event

[1]Three responses permitted.

PROMOTIONS

- Half of visitors recalled promotions in the past 6 months for the Fort Myers area
- 22% of all visitors were influenced to come to the Fort Myers area by these promotions
- Top sources of recall include[1]:

43% Internet

40% Social media

24% Traveler reviews, blogs

[1]Multiple responses permitted.

BOOKING

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

39% Directly with hotel/condo

18% Other online travel agency

18% Airbnb

15% VRBO, HomeAway

4% Vacation rental company

TRANSPORTATION

- 59% of visitors flew to the Fort Myers area
- 50% of all visitors traveled to the Fort Myers area via RSW

VISITOR JOURNEY: TRAVEL PARTY PROFILE

Pre-Visit

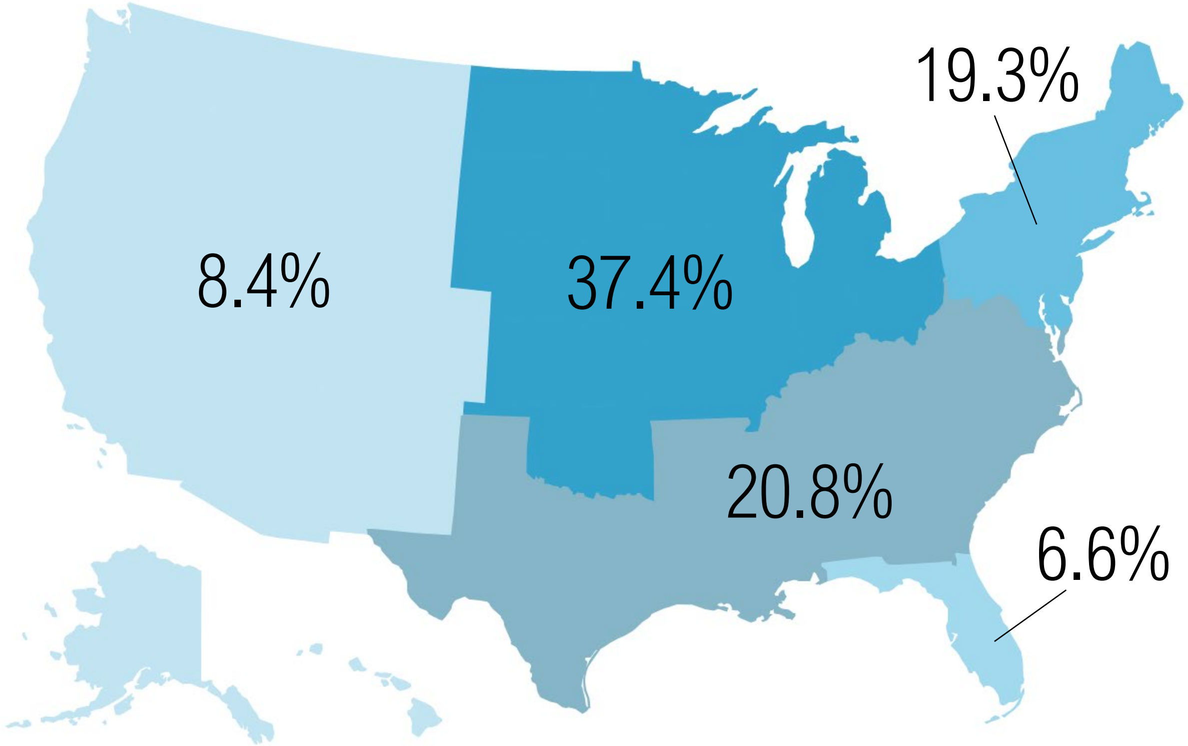
Travel Party Profile

Trip Experience

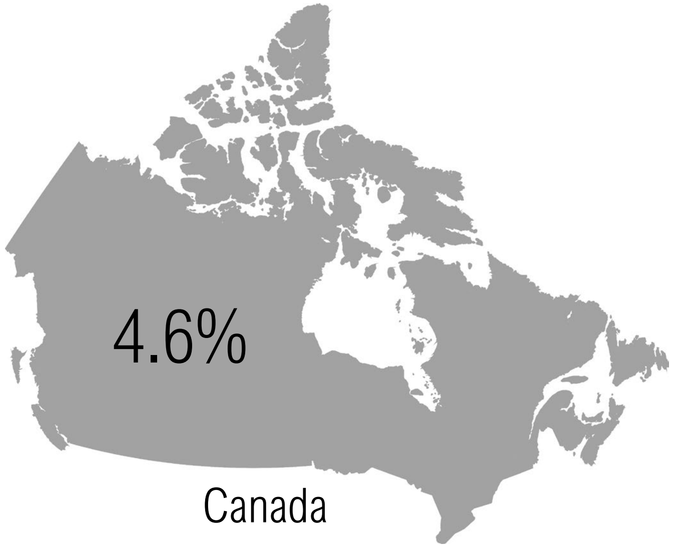
Post-Trip Evaluation

Economic Impact on Destination

ORIGIN REGION[1]



US = 92.6%



Canada

2.8% Other International Markets

(Germany, UK, etc.)

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

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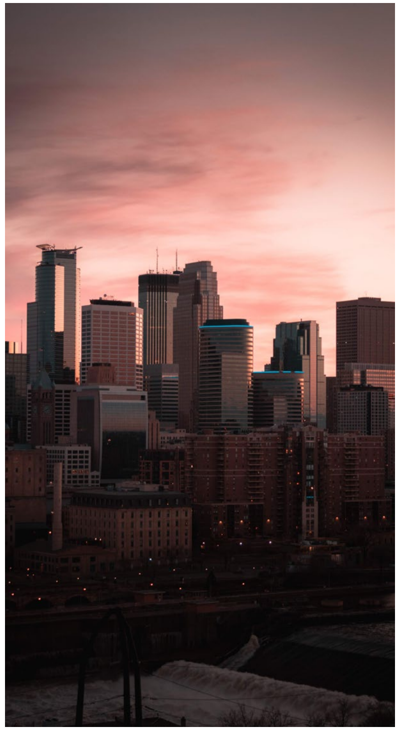
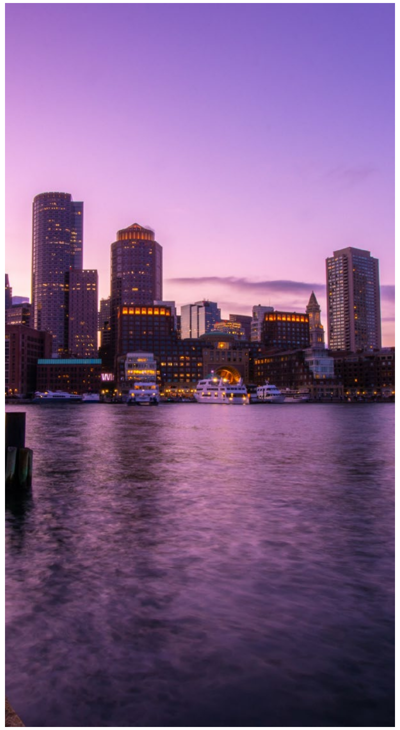
TOP ORIGIN MARKETS[1]



6% Minneapolis-St. Paul

4% New York City

4% Detroit



4% Boston

4% Atlanta

4% Chicago

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

TRAVEL PARTY SIZE AND COMPOSITION

- Visitors traveled in a party composed of 2.9 people[1]
- 30% traveled with children
- 1 in 3 visitors traveled either as a family or as a couple, while over 1 in 7 visitors traveled by themself

[1]Sources: Occupancy Study and Visitor Tracking Study

DEMOGRAPHIC PROFILE[1]

January - March Visitors:

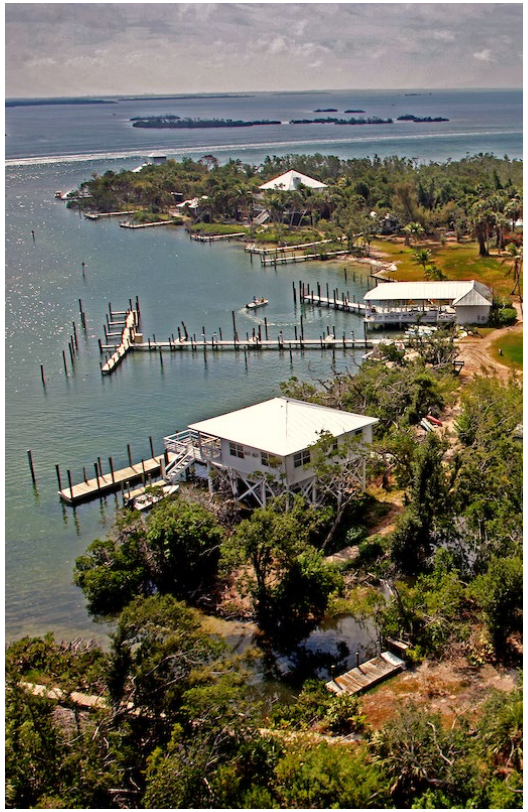
- Average age of 49 years old
- Median household income of $111,500
- Married (73%)
- College educated (68%)
- Caucasian/white (77%)
- Male (57%)

[1]Of people interviewed.

Visitor Journey: Trip Experience

TOP ACCOMMODATIONS

38% Hotel/Motel/Resort



35% Non-paid Accommodations

20% Condo/Vacation Rental

LENGTH OF STAY & NUMBER OF TIMES IN DESTINATION

- Visitors[1] spent an average of 8.3 nights in the Fort Myers area
- 25% were first time visitors
- 22% have visited more than 10 times

[1]Sources: Occupancy Study and Visitor Tracking Study

VISITOR ACTIVITIES

- Top visitor activities include[1]:

65% Dining out

62% Relaxing & unwinding

43% Visiting friends/family

38% Shopping

[1]Multiple responses permitted.

TOP ATTRACTIONS VISITED[1]

34% Beaches

27% Bell Tower Shops

22% Gulf Coast Town Center

21% Edison & Ford Winter Estates

21% Miromar Outlets

18% Coconut Point Mall

[1]Multiple responses permitted.

TOP COMMUNITIES STAYED

46% Fort Myers

17% Cape Coral

VISITOR JOURNEY: POST-TRIP EVALUATION

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

SATISFACTION

- 88% of visitors are likely to recommend the area
  - 44% are very likely to recommend
- 86% of visitors are likely to return
  - 49% are very likely to return
- 78% of visitors are likely to return next year
  - 44% are very likely to return next year

SATISFACTION

- 90% of visitors were satisfied or very satisfied with their overall visit to the Fort Myers area (49% were very satisfied)
- 88% of visitors were satisfied or very satisfied with customer service on their visit (45% were very satisfied)
- 90% of visitors said paid accommodations at least met their expectations (31% said they exceeded expectations)

TOP ATTRIBUTE RATINGS

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

94% Warm weather

90% Peaceful/relaxing

88% 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
- 1 in 5 were concerned about high prices
- Nearly 3 in 10 visitors had no concerns at all about the destination

[1]17% of visitors specifically mentioned concerns regarding the impact of Hurricane Ian.

AREA DESCRIPTIONS

Warm Weather

"It's a wonderful place to vacation, despite the hurricane damage. Still has great weather and a great atmosphere."

Peaceful/Relaxing

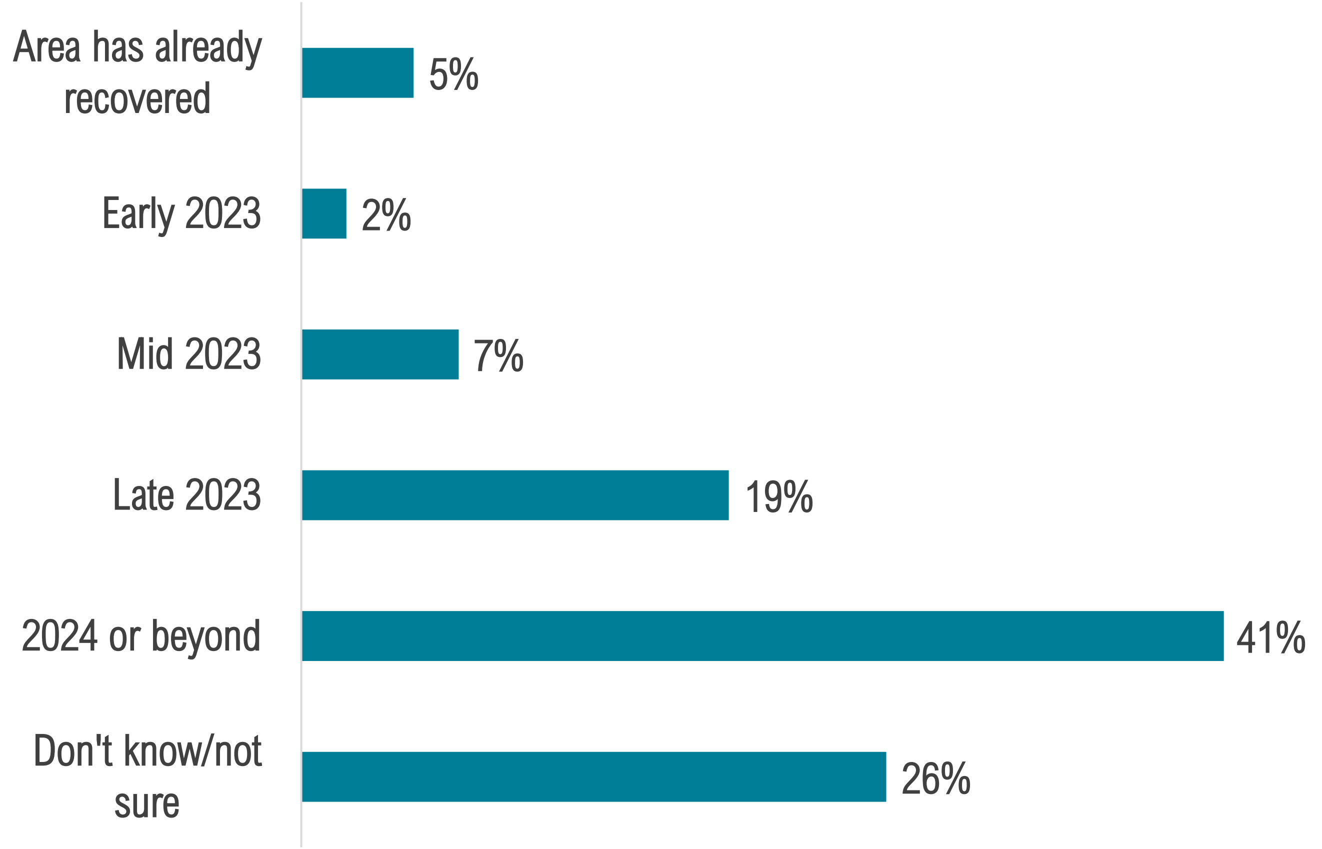
"Great area with lots to do and see, but also a wonderful place to just do nothing but relax."

Safe Destination

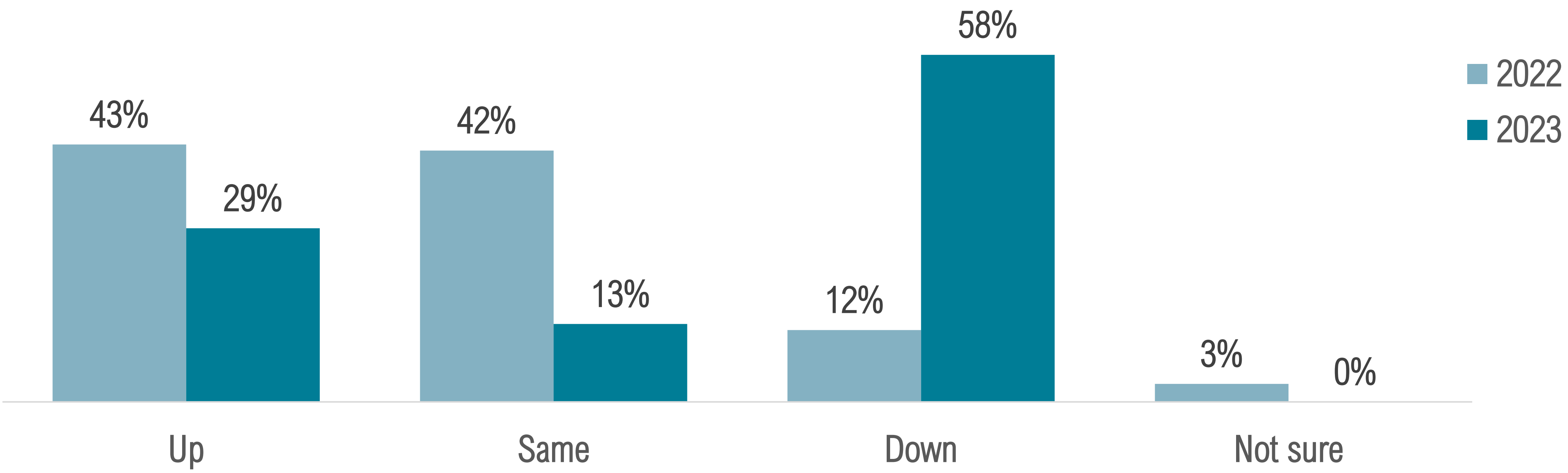
"Beautiful place full of friendly people. They're getting back on their feet fast!"

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?"



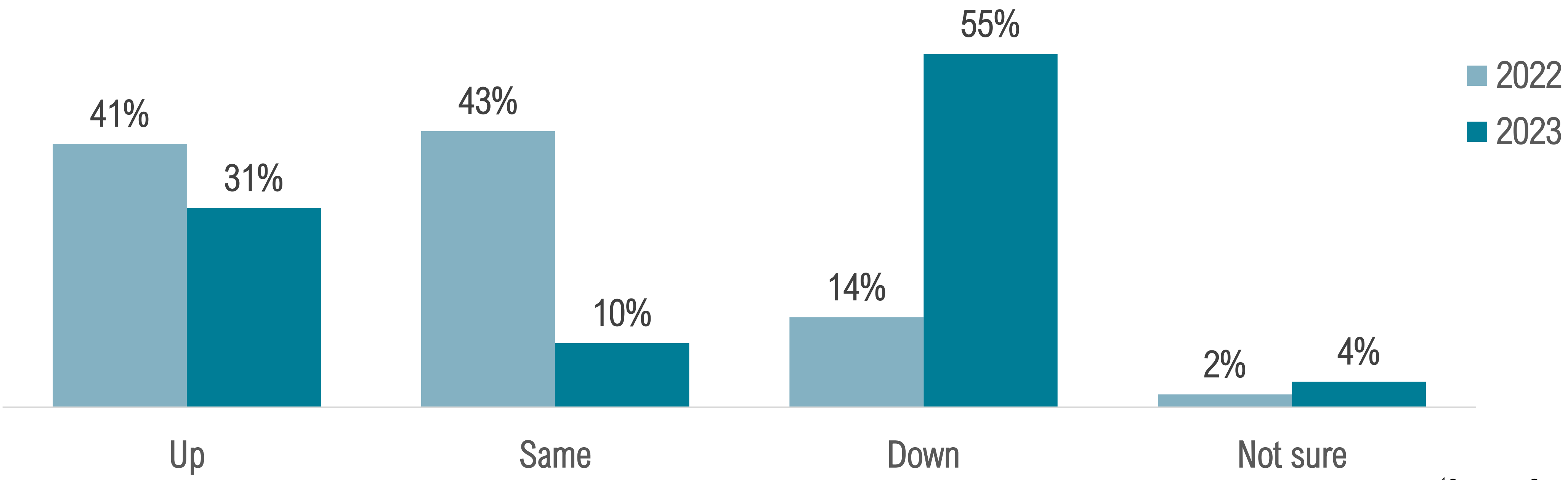
OCCUPANCY BAROMETER[1]: APR – JUN RESERVATIONS



[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?"

OCCUPANCY BAROMETER[1]: JUL – SEPT RESERVATIONS



[1]Sources: Occupancy Survey

Accommodations partners were asked the following, "Please think about your reservations for the next three months. Compared to July through September of 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

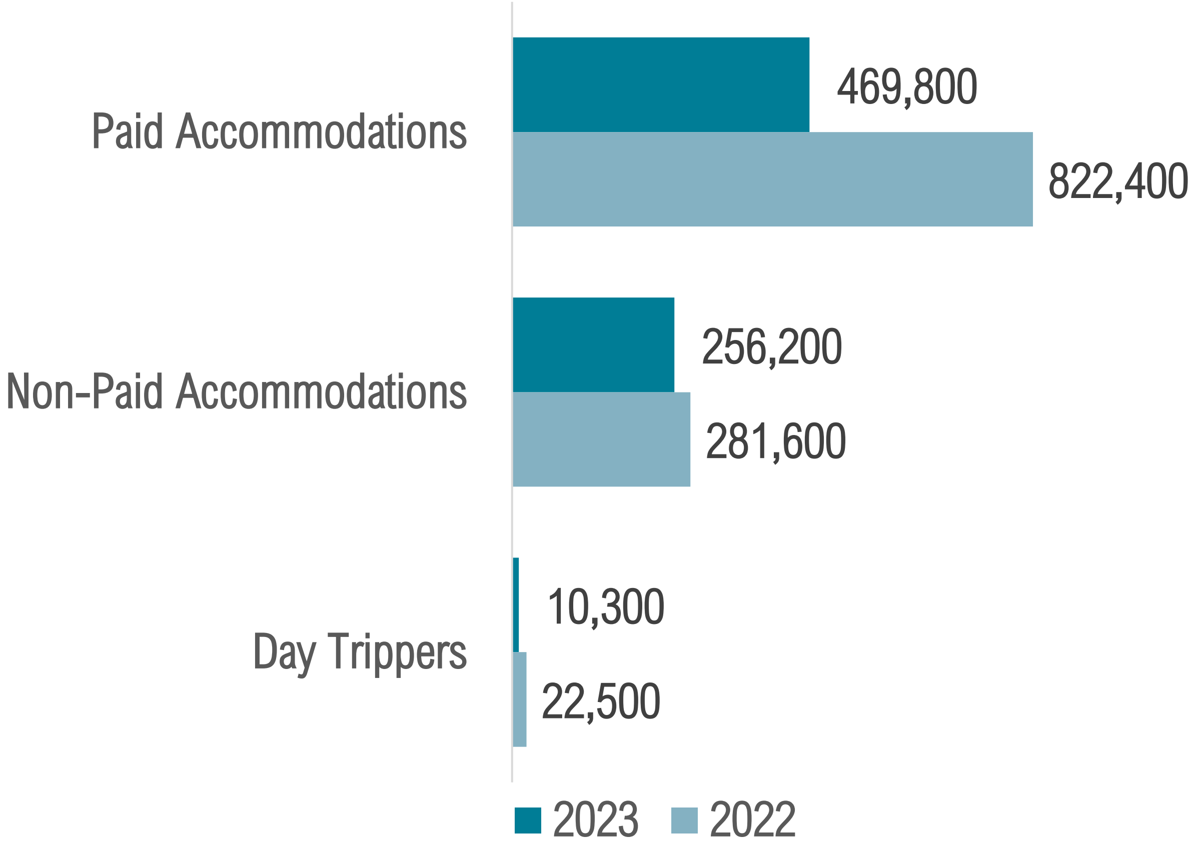
Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

NUMBER OF VISITORS

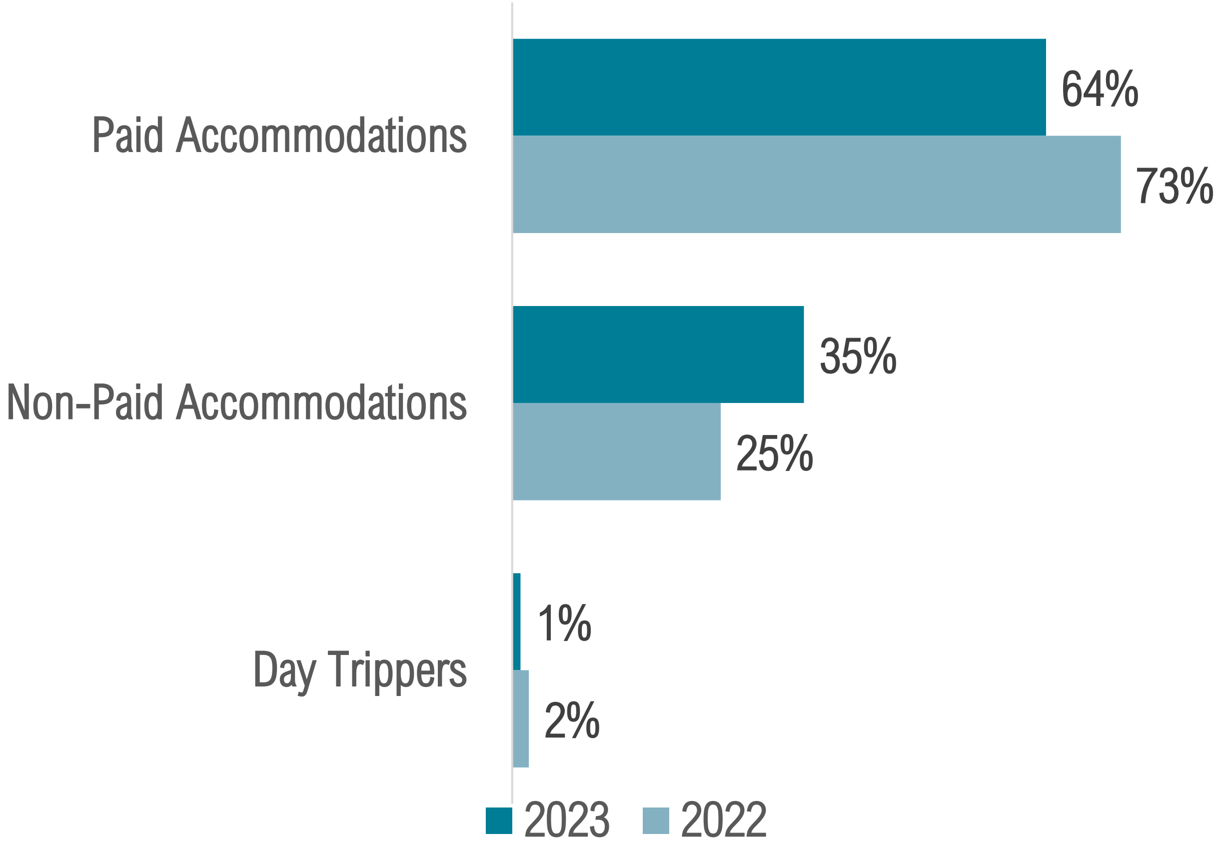
There were 736,300[1] visitors to the Fort Myers area in January - March 2023 (-34.6% from 2022).



[1]Sources: Visitor Tracking Study & Occupancy Survey

VISITOR TYPE

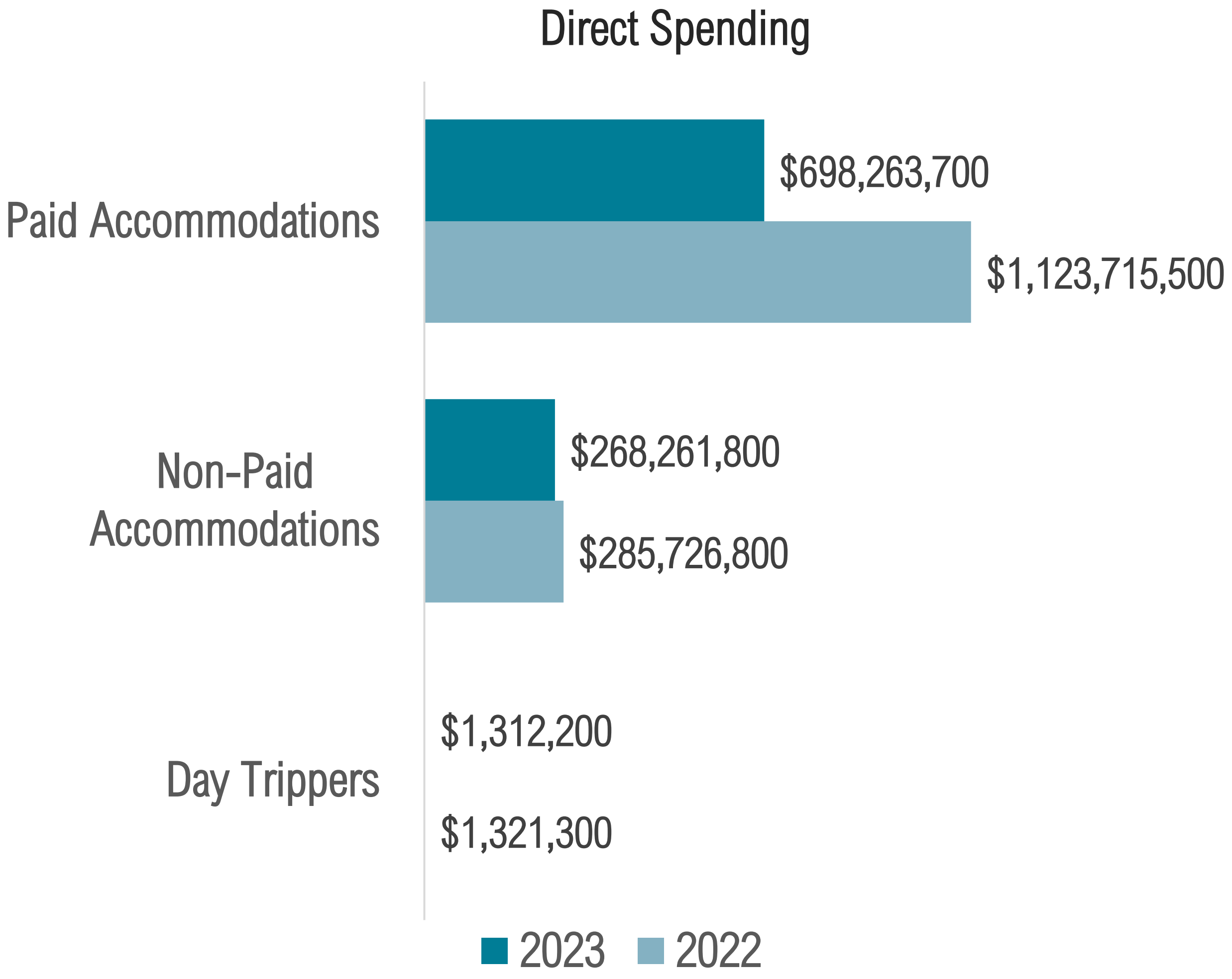
Visitors staying in paid accommodations accounted for nearly **2 in 3** visitors.



VISITOR EXPENDITURES BY VISITOR TYPE

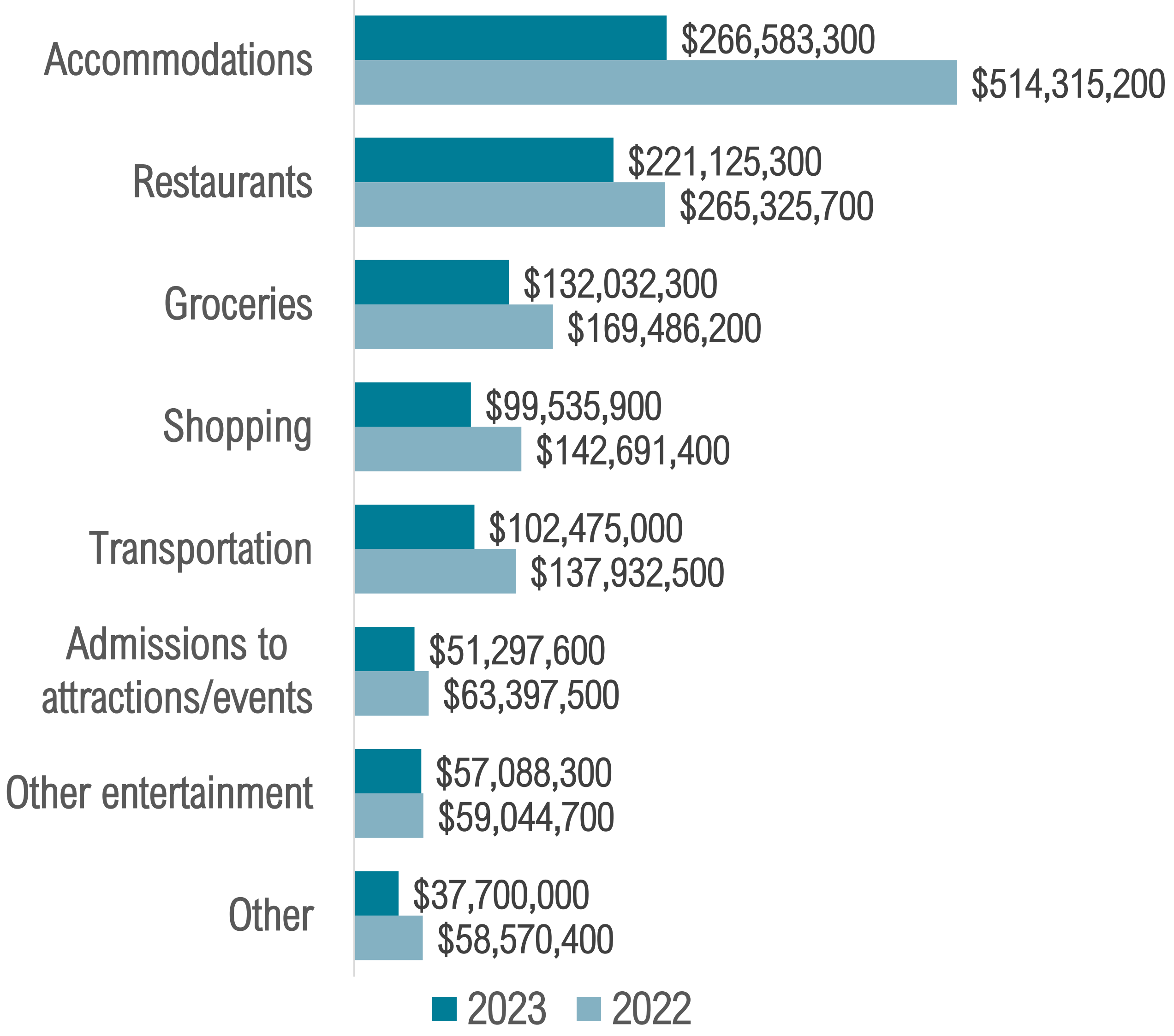
January - March visitors spent $967,837,700 in the Fort Myers area, resulting in a total economic impact of $1,549,508,200, down 31.1% from 2022.

Visitors staying in paid accommodations accounted for 64% of all visitors and 72% of all spending.



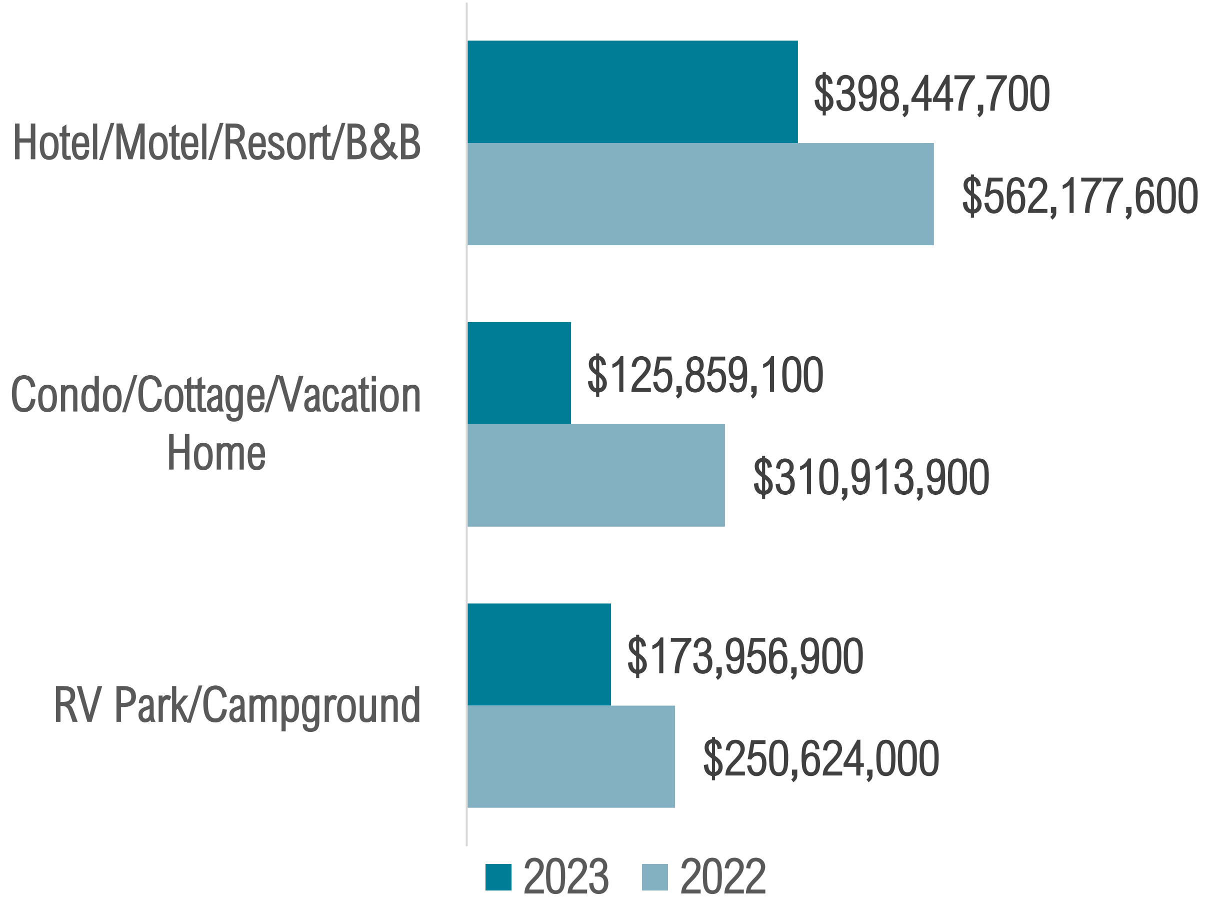
VISITOR EXPENDITURES BY SPENDING CATEGORY

Of the $967,837,700 visitors spent in the Fort Myers area, 27% was spent on accommodations and 23% was spent on restaurants, accounting for 50% of all visitor spending.



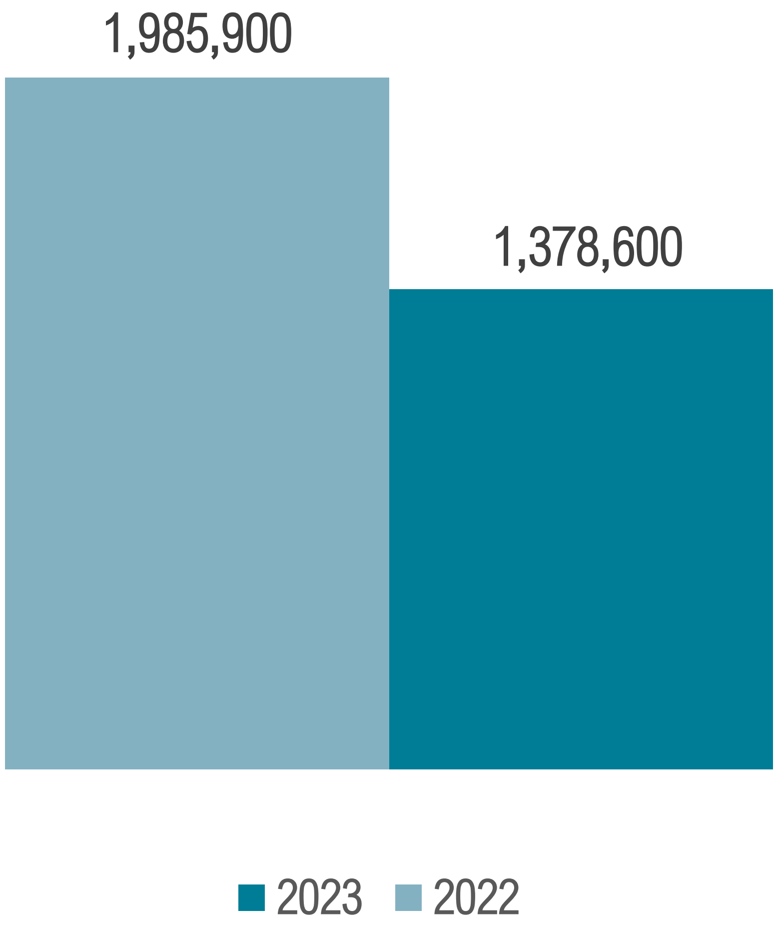
VISITOR EXPENDITURES BY LODGING TYPE

January - March visitors staying in paid accommodations spent $698,263,700 in the Fort Myers area.



ROOM NIGHTS GENERATED

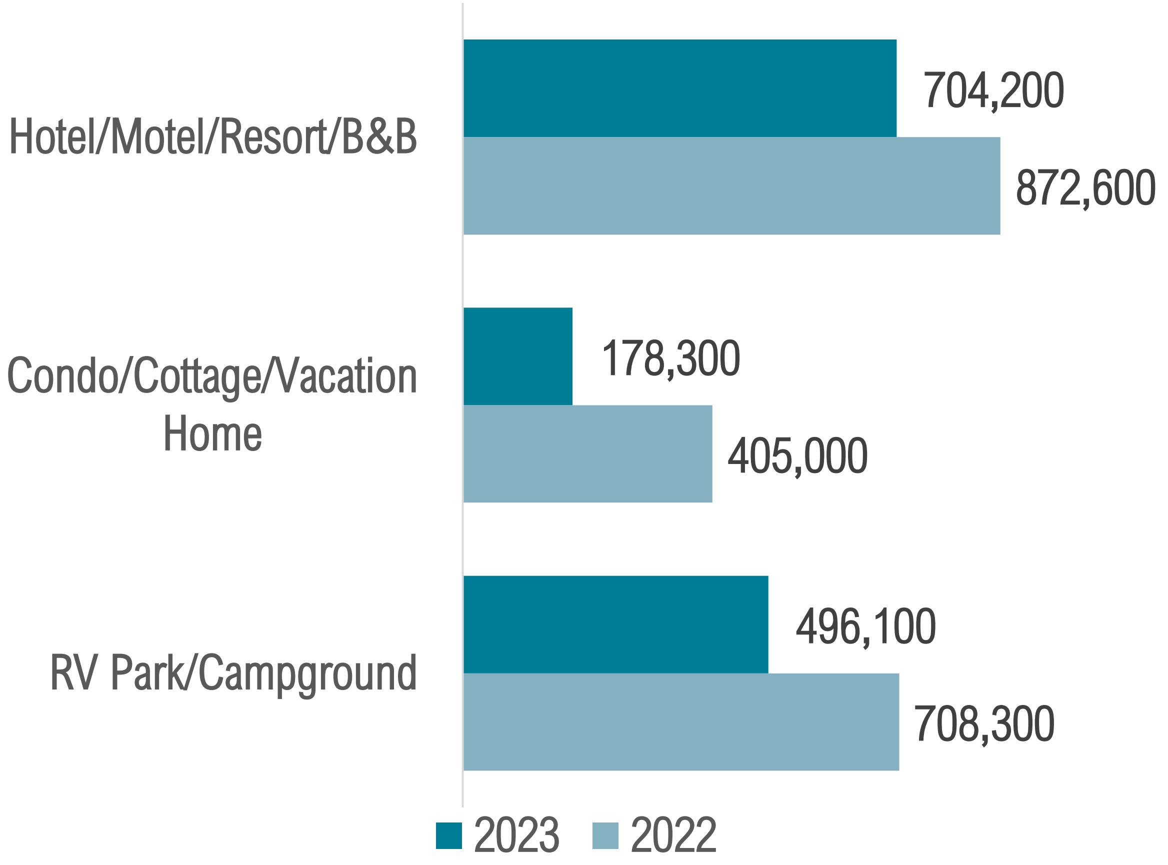
January - March visitors spent 1,378,600[1] nights in Fort Myers area hotels, resorts, condos, rental houses, RV parks, etc. (-30.6% from 2022).



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

ROOM NIGHTS GENERATED

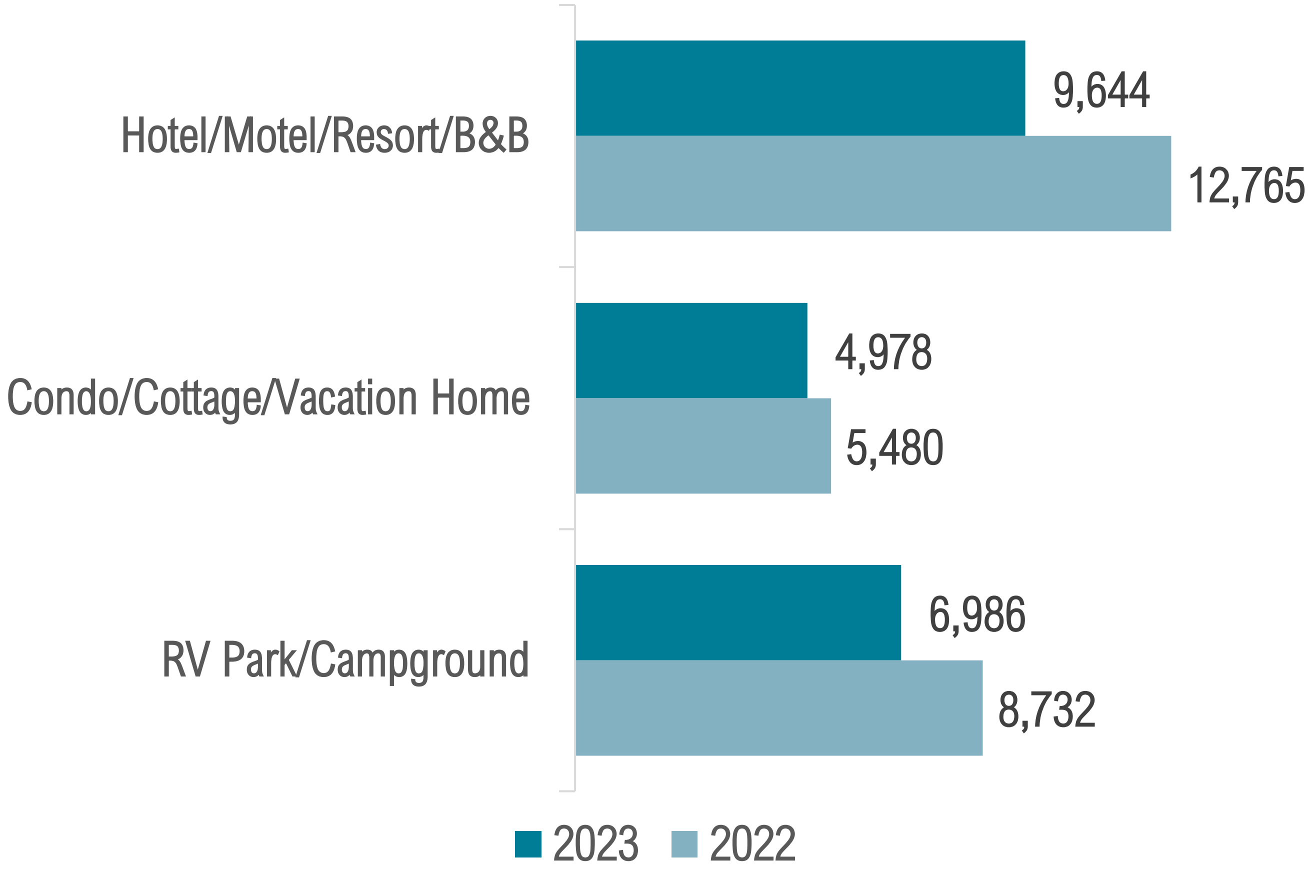
Hotels, motels, etc. accounted for just over **half** of the room nights spent in the Fort Myers area, while vacation rentals only accounted for roughly **1 in 8** nights visitors spent in the area.



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

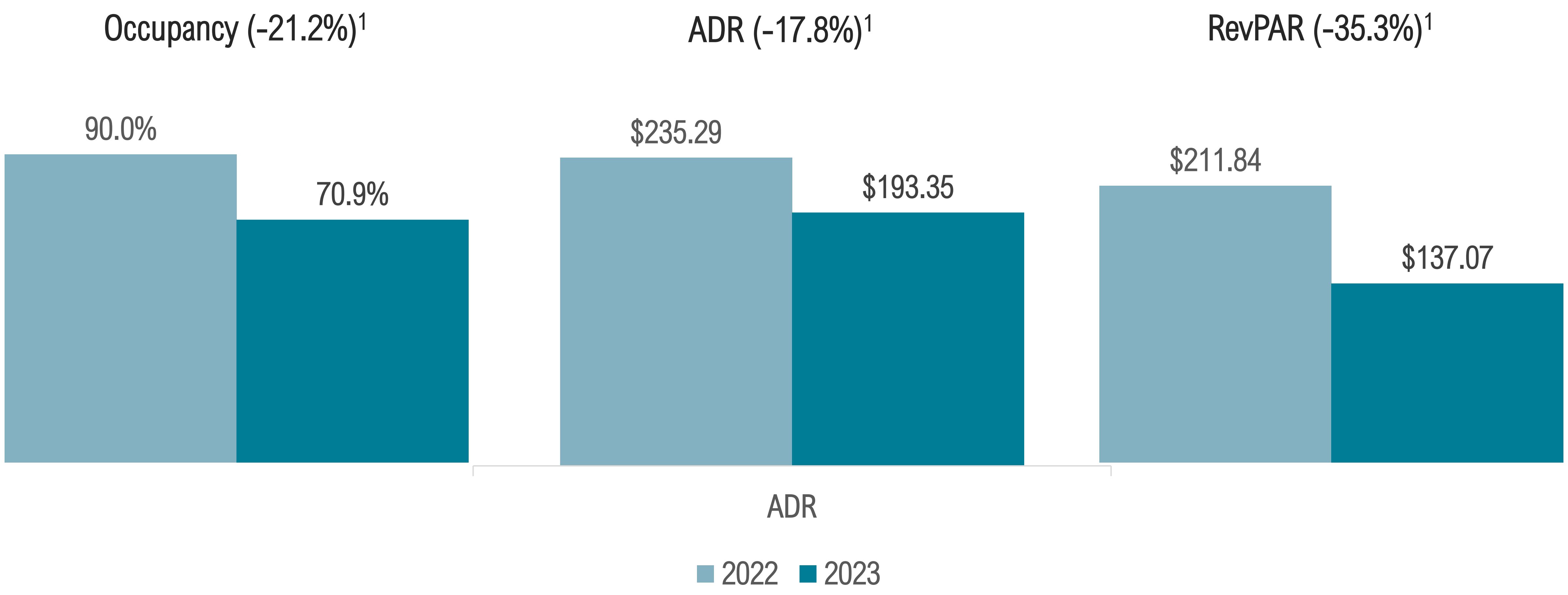
AVAILABLE UNITS

There were 21,608[1] available units in January - March 2023 vs. 26,977 in 2022 (-19.9%). Over 2 in 5 of the units available were from hotels, motels, etc.



[1]Source: Occupancy Study, STR, and KeyData
[2]In Jan-Mar 2022, a different estimate of available vacation rental units was used. As a result, the true number of available units was likely higher.

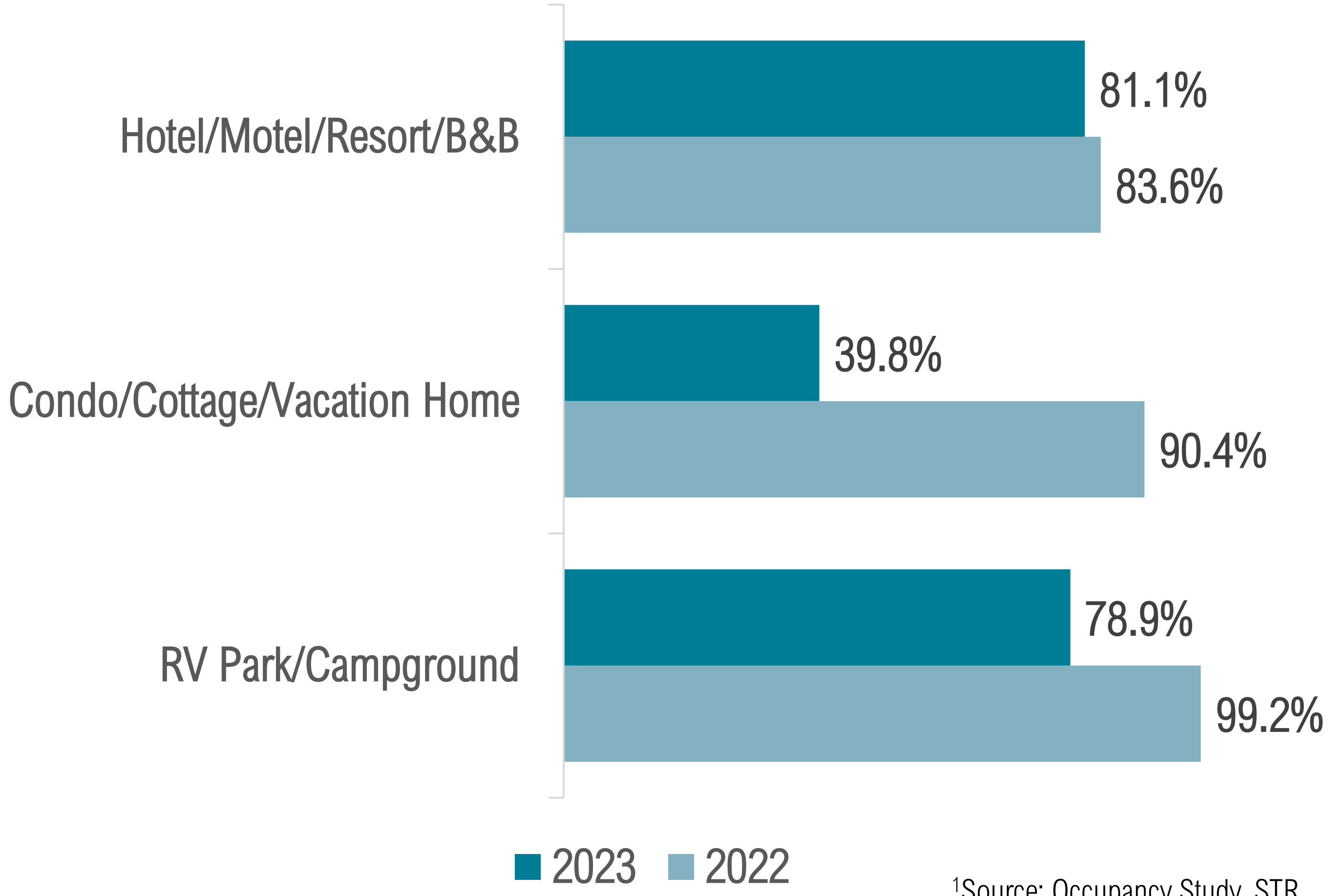
OCCUPANCY, ADR AND REVPAR



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

OCCUPANCY

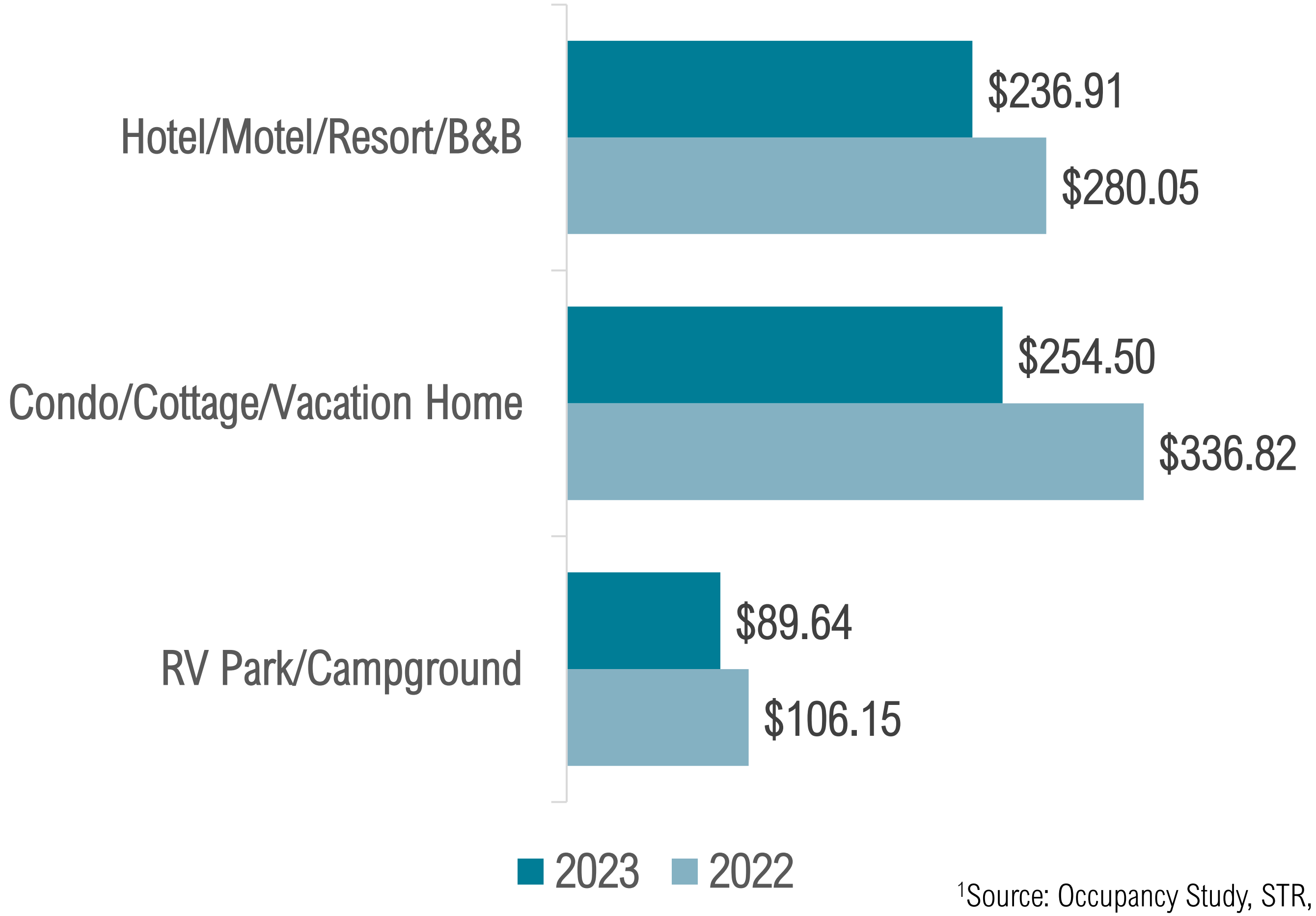
Average occupancy in January - March was 70.9%[1] (90.0% in 2022).



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

ADR

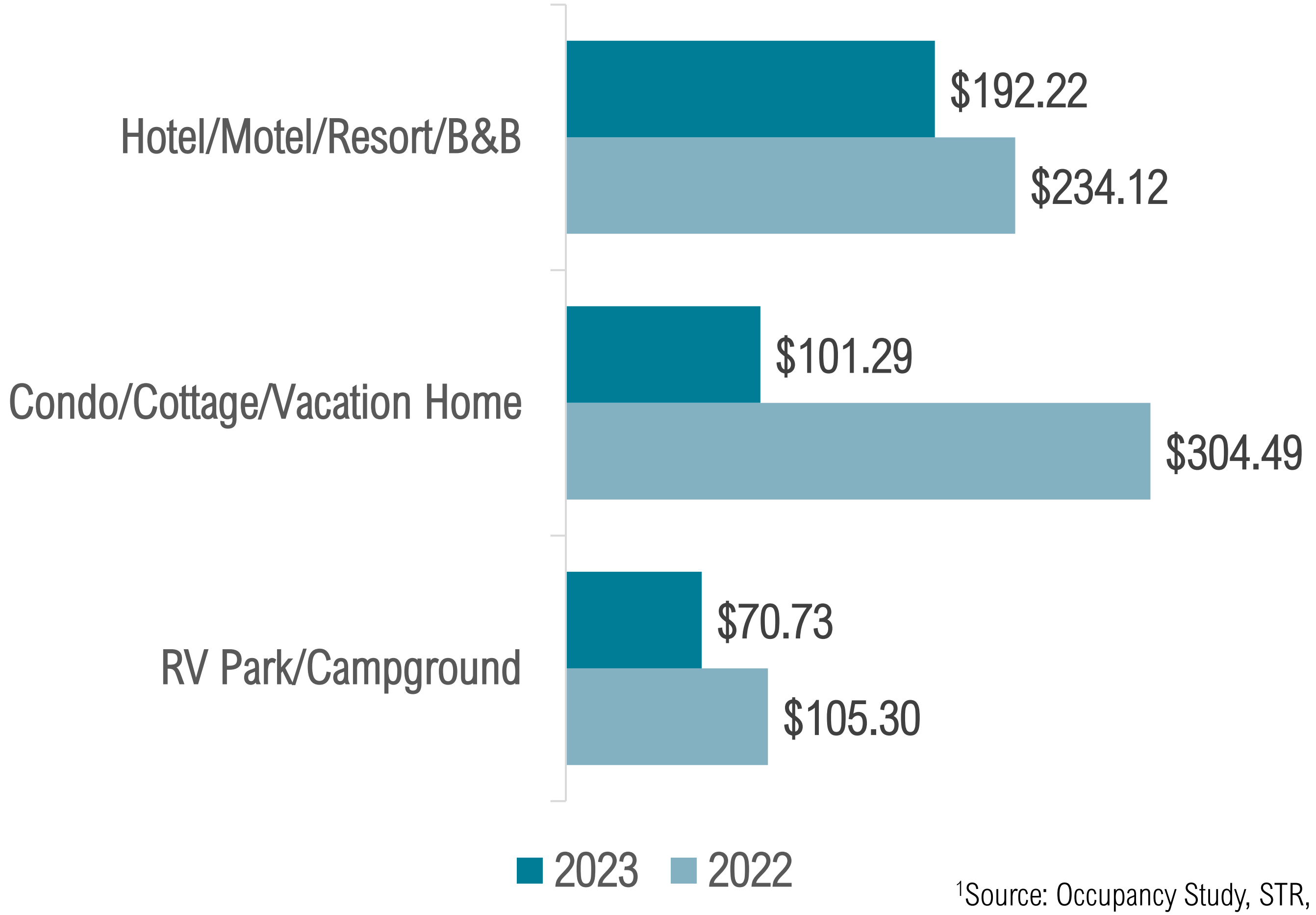
ADR in January - March was **$193.35**[1] ($235.29 in 2022).



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

REVPAR

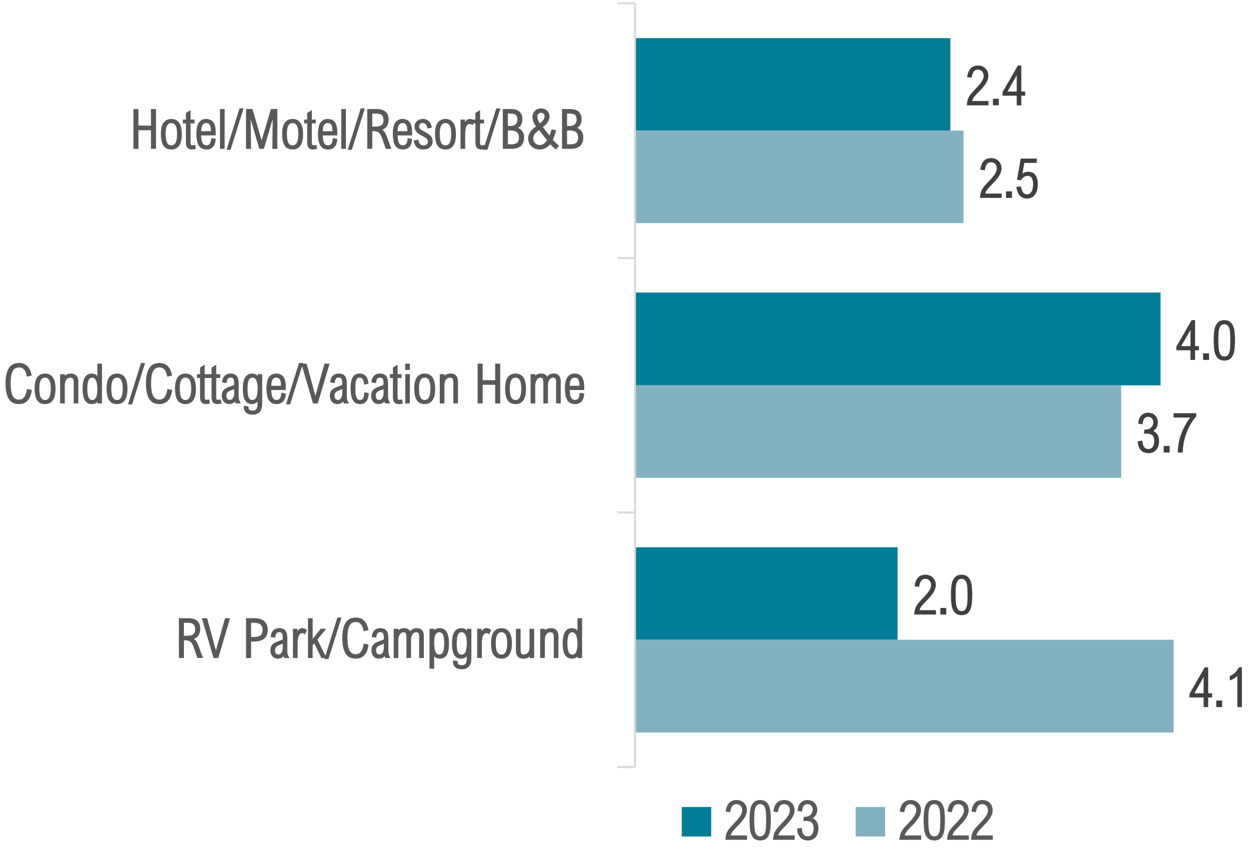
Average RevPAR in January - March was **$137.07**[1] ($211.84 in 2022).



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

TRAVEL PARTY SIZE

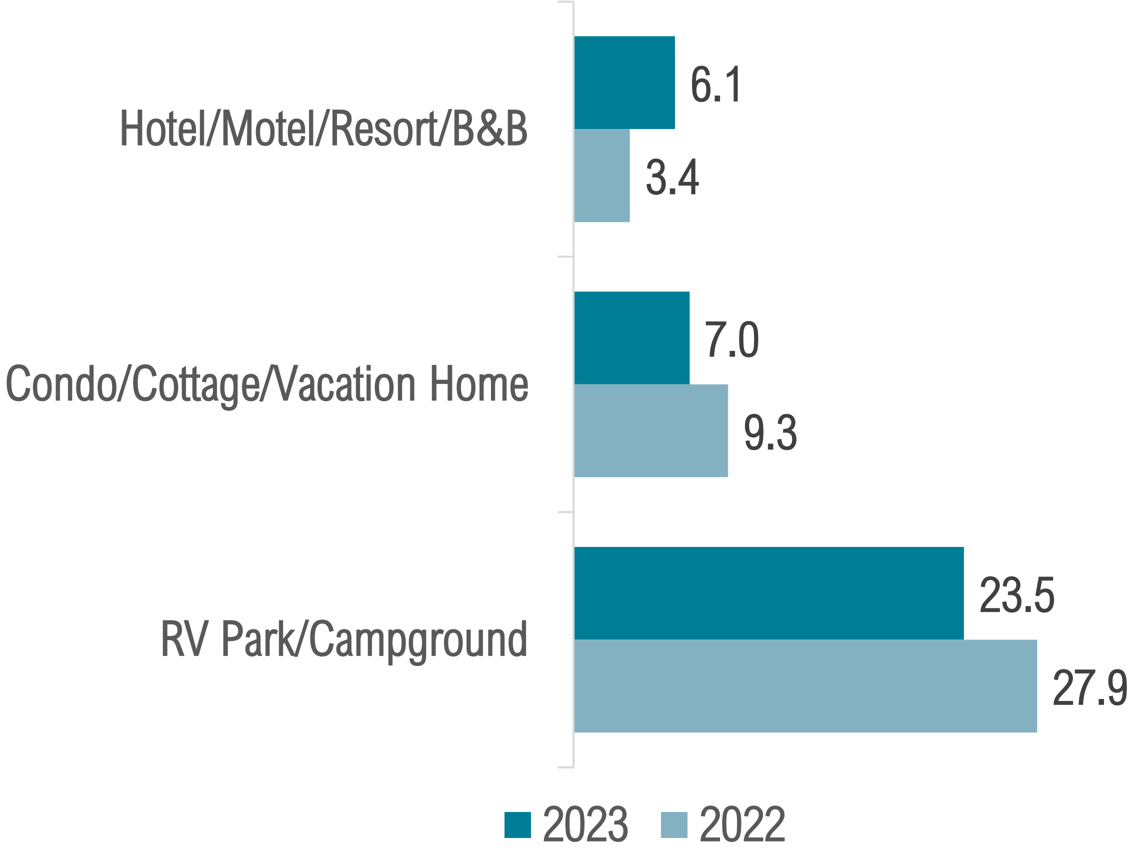
For visitors in paid accommodations, average travel party size in January - March was 2.7 people[1] (2.9 people in 2022).



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

LENGTH OF STAY

For visitors in paid accommodations, average length of stay in January - March was **8.1 nights**[1] (7.7 nights in 2022).



[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

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

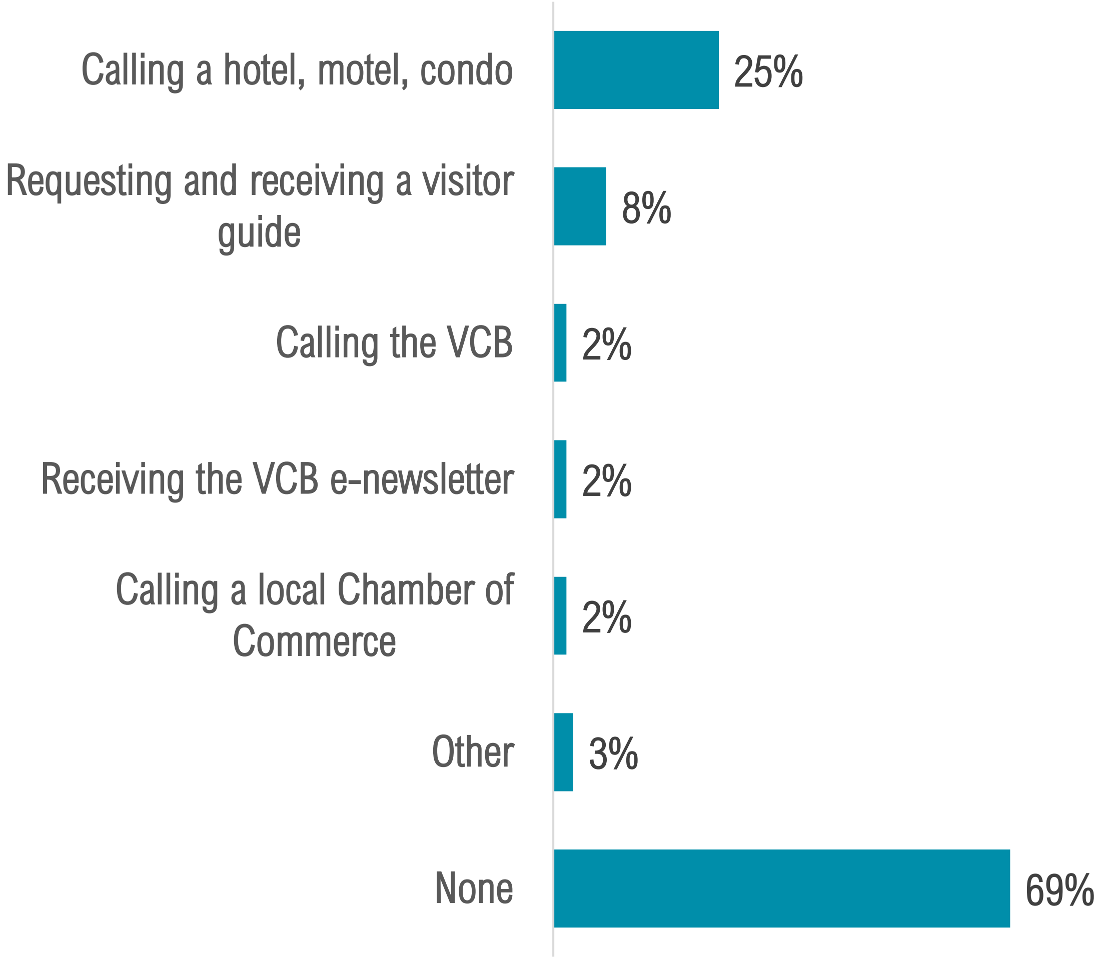
The average trip planning cycle lasted nearly 3 months (81 days).

TRIP PLANNING: INFORMATION REQUESTS[1]

Over 3 in 10 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, and condos** or on a **visitor guide.**

The number of visitors requesting information in Q1 2023 was lower than in Q1 2022.



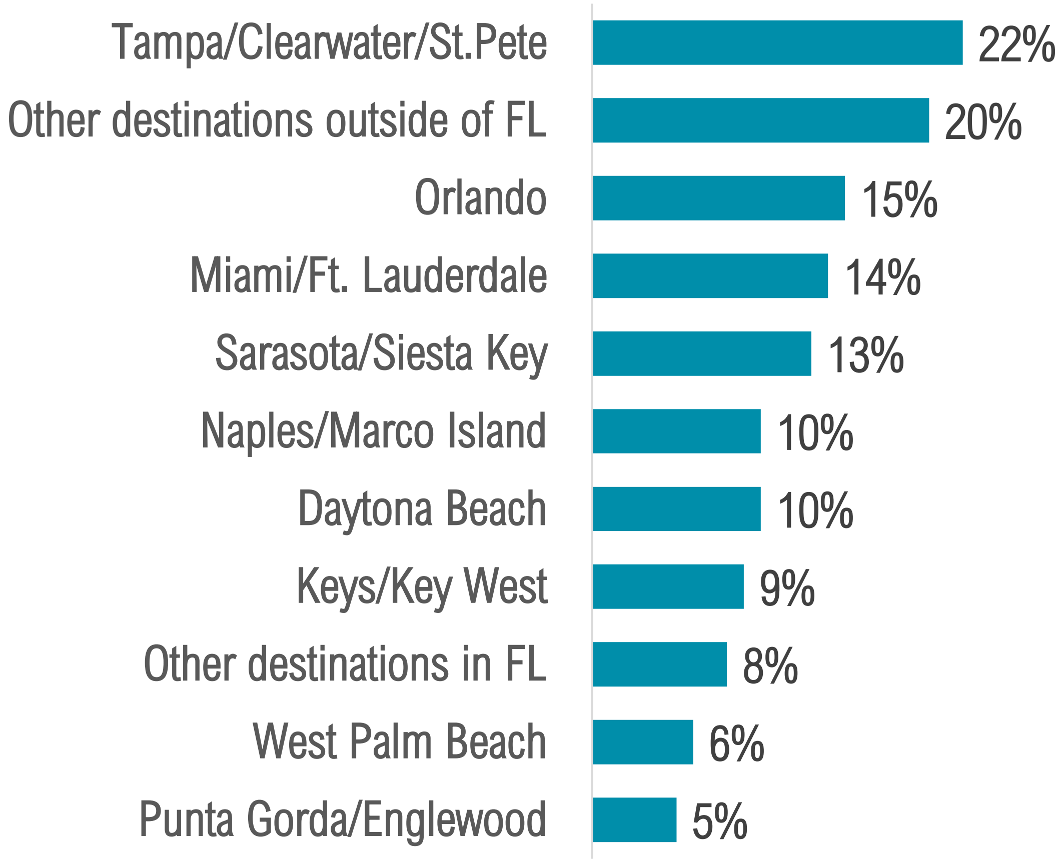
[1]Multiple responses permitted.

TRIP PLANNING: OTHER DESTINATIONS CONSIDERED[1]

Most alternate destinations considered were in Florida.

Only 1 in 5 visitors considered destinations outside of Florida.

BASE: 58% of visitors who considered other destinations



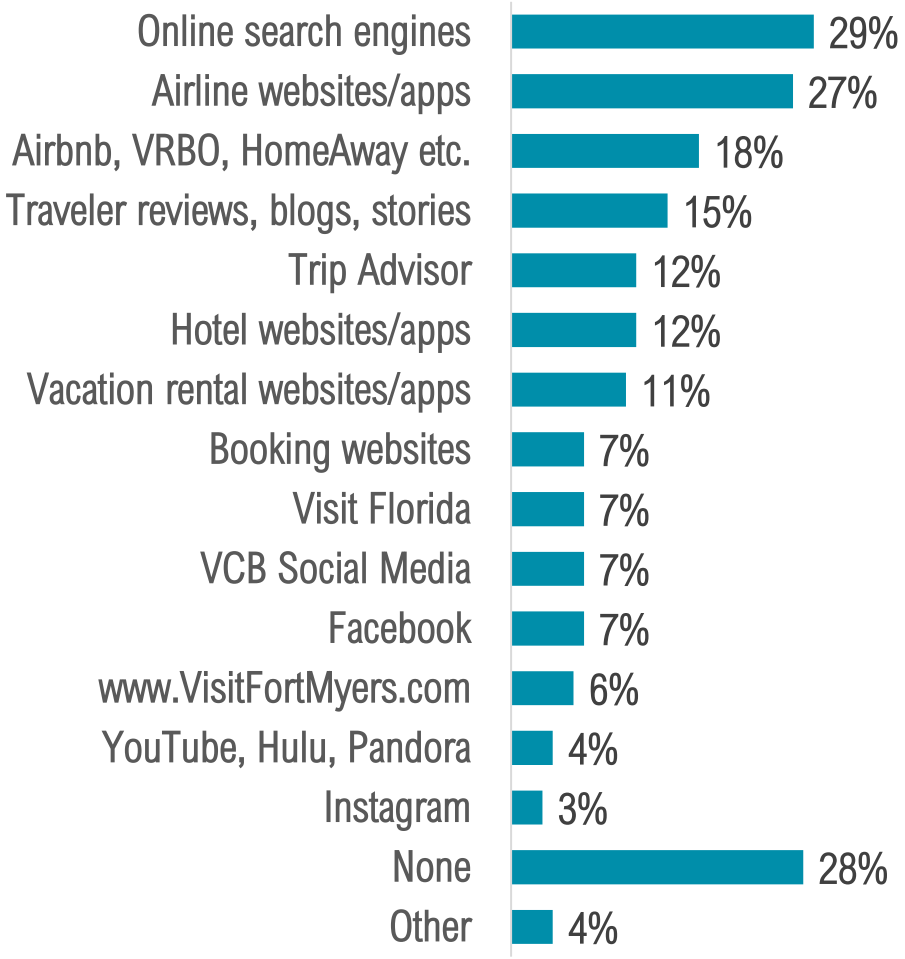
[1]Multiple responses permitted.

TRIP PLANNING: WEBSITES/APPS USED[1]

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

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

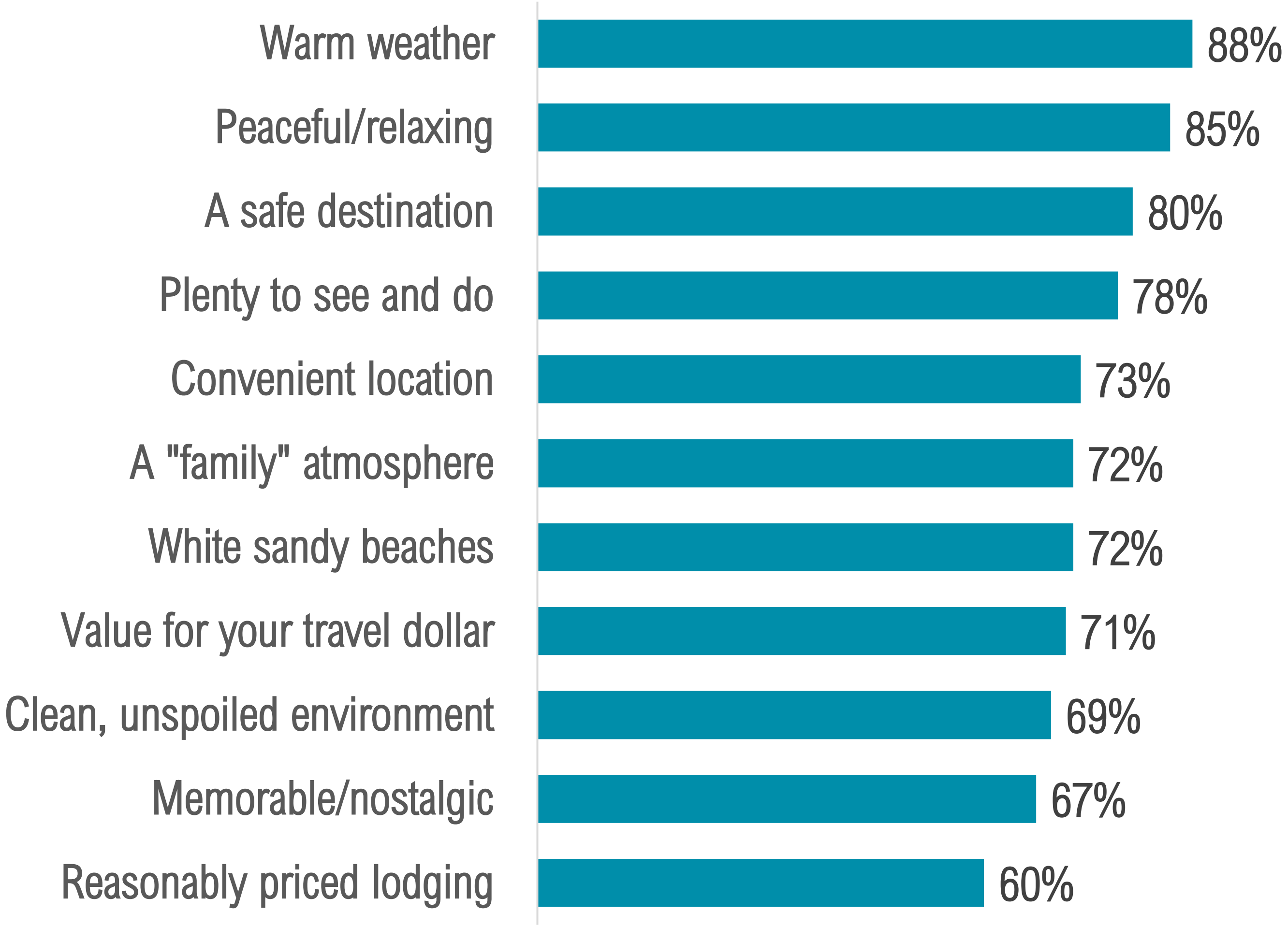
Nearly **1 in 5** visitors used **Airbnb, VRBO, HomeAway, or similar websites** to plan their trips.



[1]Multiple responses permitted.

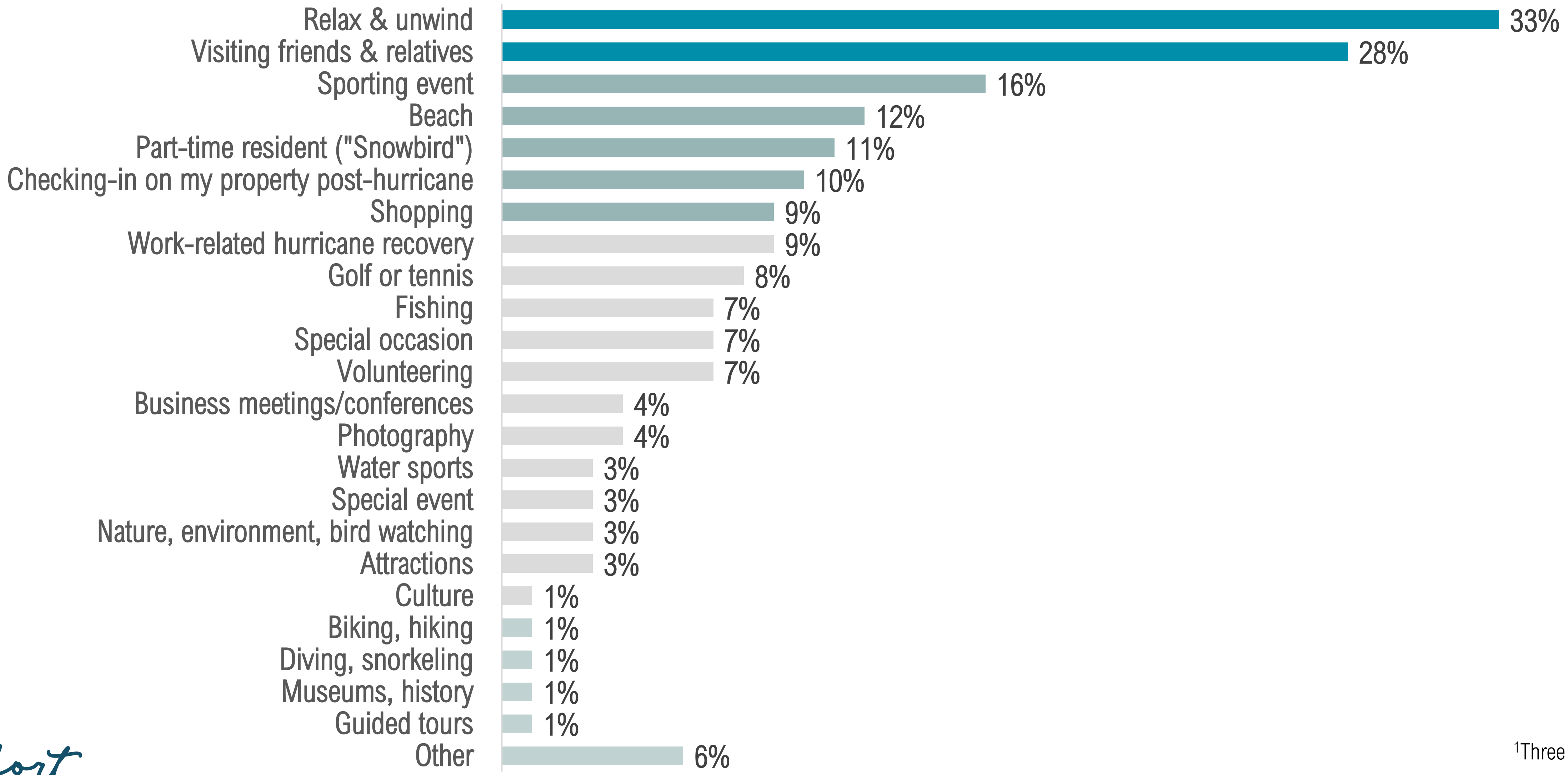
TRIP INFLUENCERS[1]

Over 4 in 5 visitors were heavily influenced by the warm weather, peacefulness, and safety 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]



Pre-Visit
Jan - Mar 2023

[1]Three responses permitted.

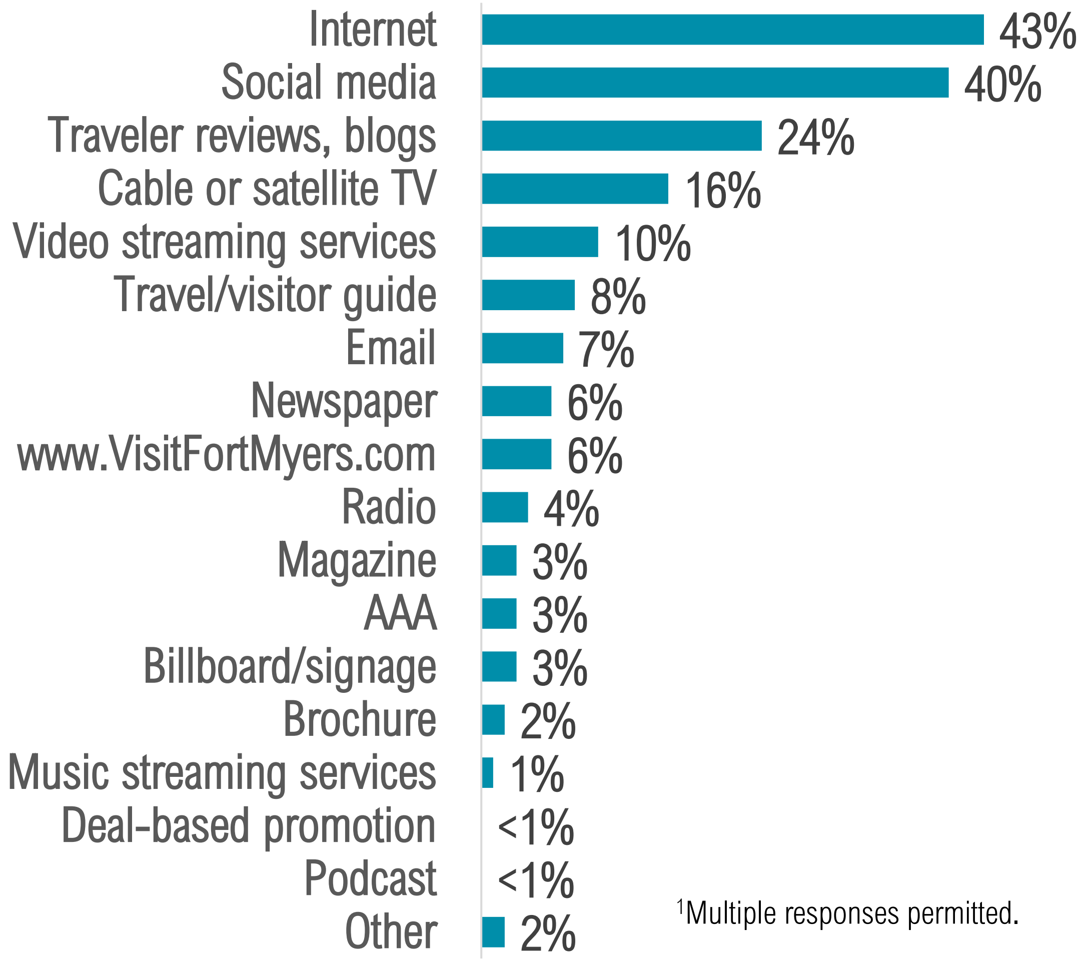
PROMOTIONS[1]

50% of visitors **recalled promotions** in the past 6 months for the Fort Myers area.

This influenced 22% of all visitors to come to the Fort Myers area.

BASE: 50% of visitors who recalled promotions

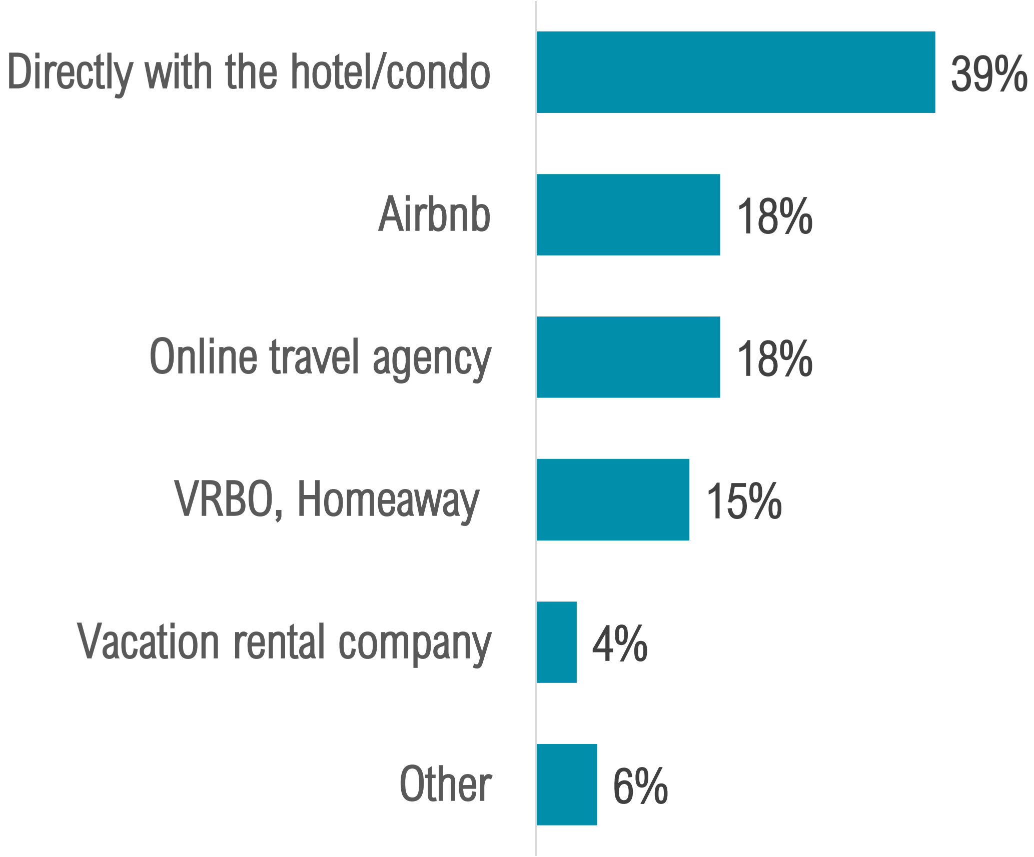
Source of Promotion



[1]Multiple responses permitted.

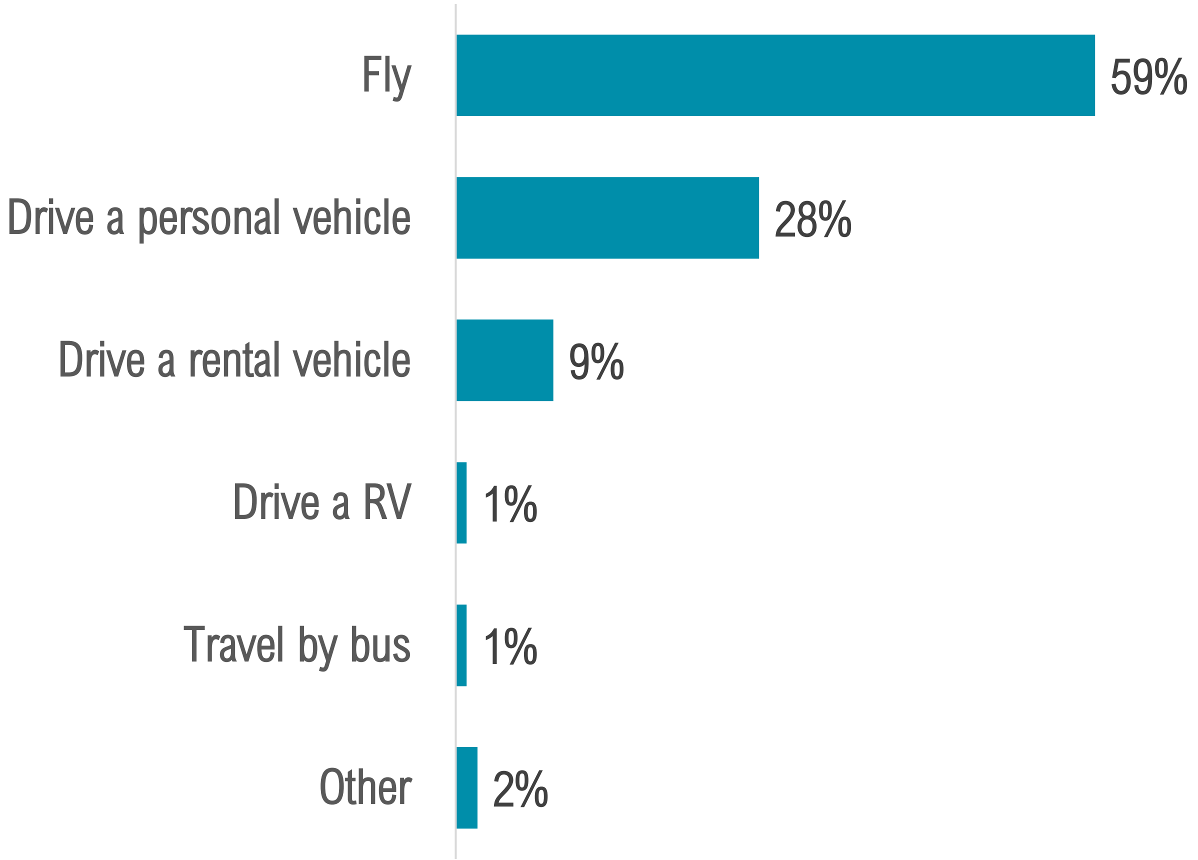
BOOKING

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



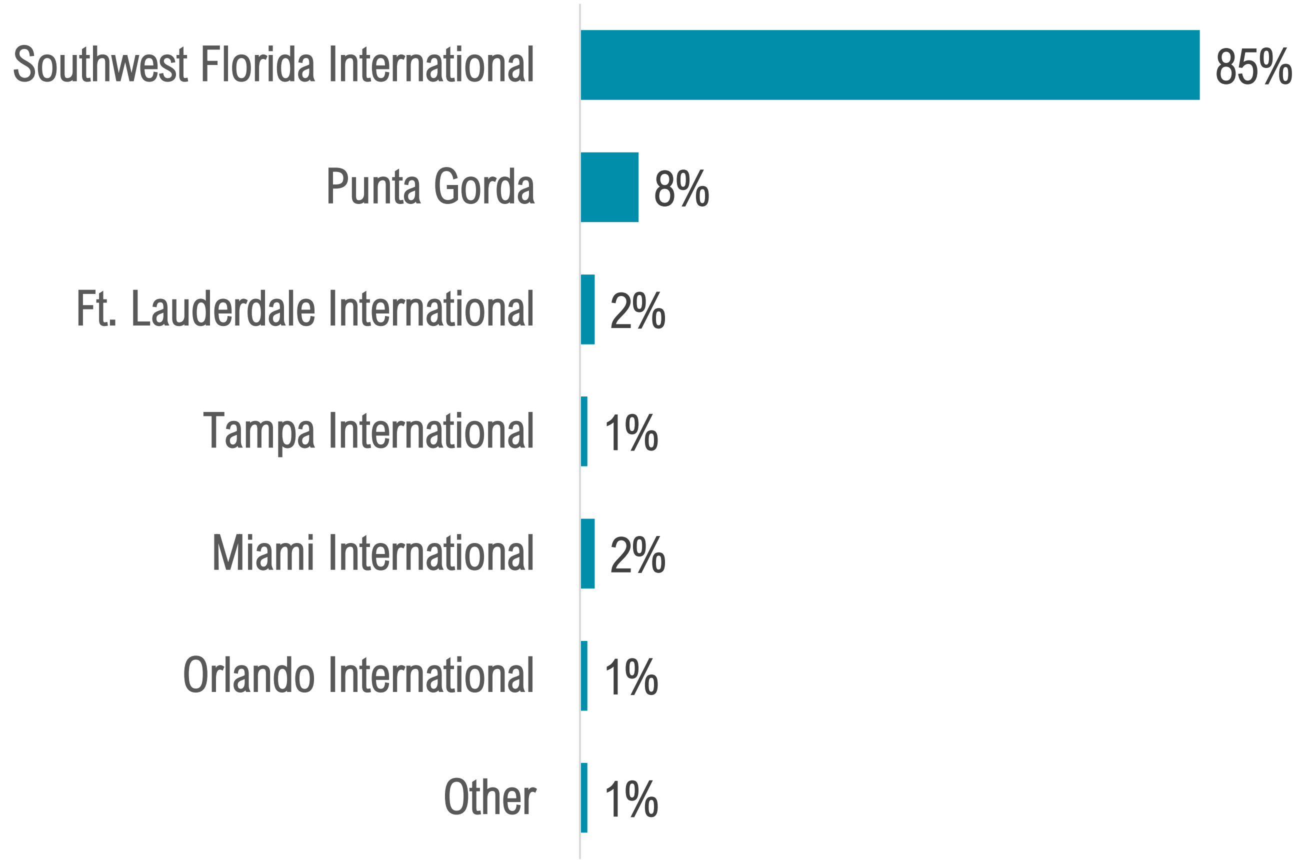
TRANSPORTATION

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



AIRPORT

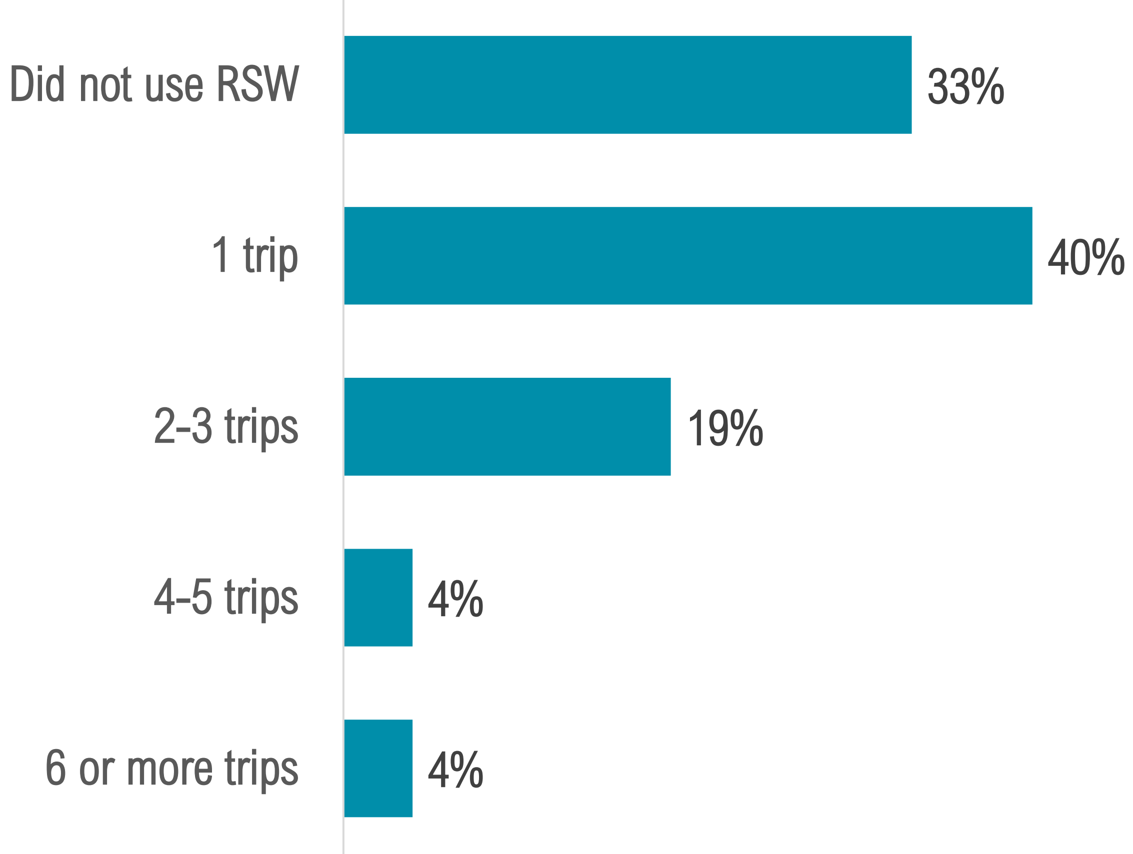
BASE: 59% of visitors who flew



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

USE OF RSW IN THE PAST YEAR

67% of visitors used RSW **at least once** in the past year.



VISITOR JOURNEY: TRAVEL PARTY PROFILE

Pre-Visit

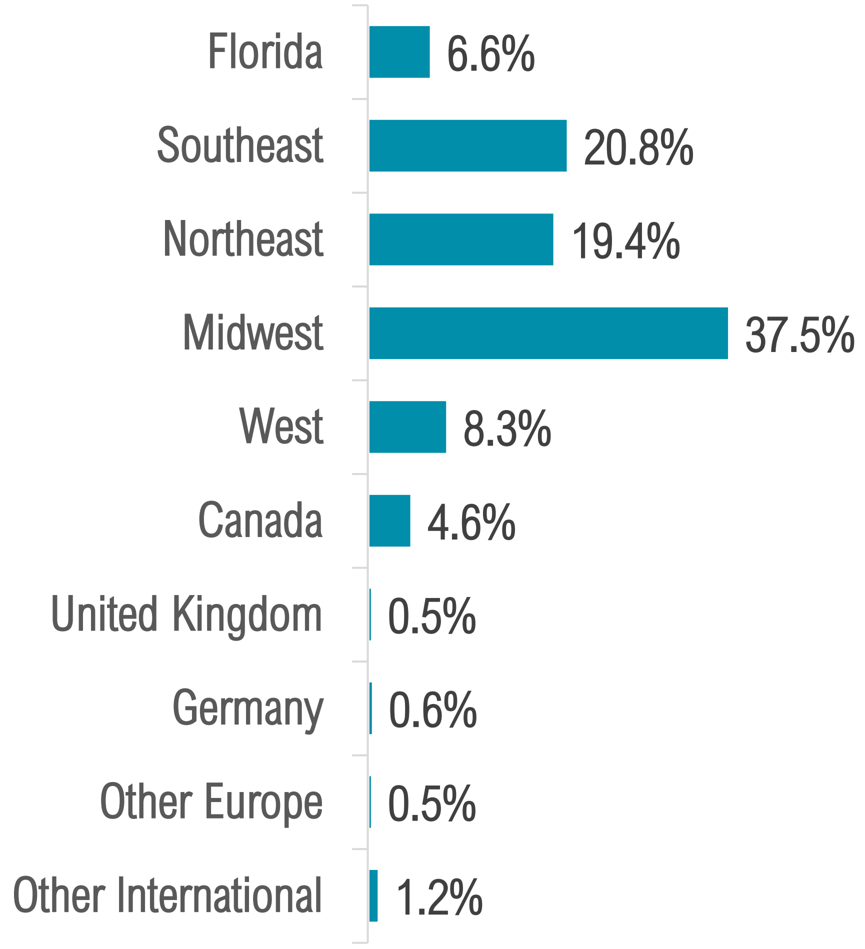
Travel Party Profile

Trip Experience

Post-Trip Evaluation

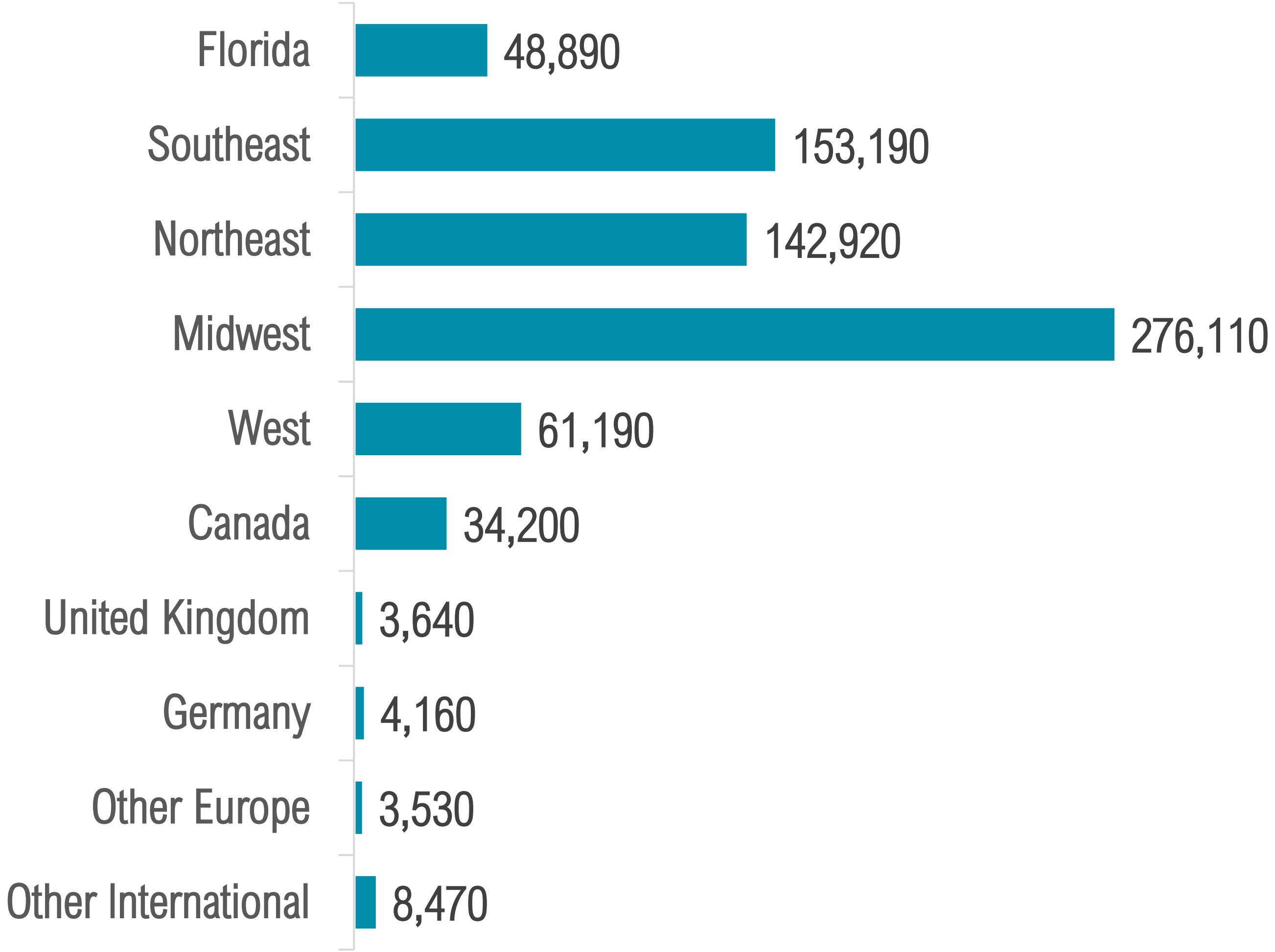
Economic Impact on Destination

ORIGIN[1]



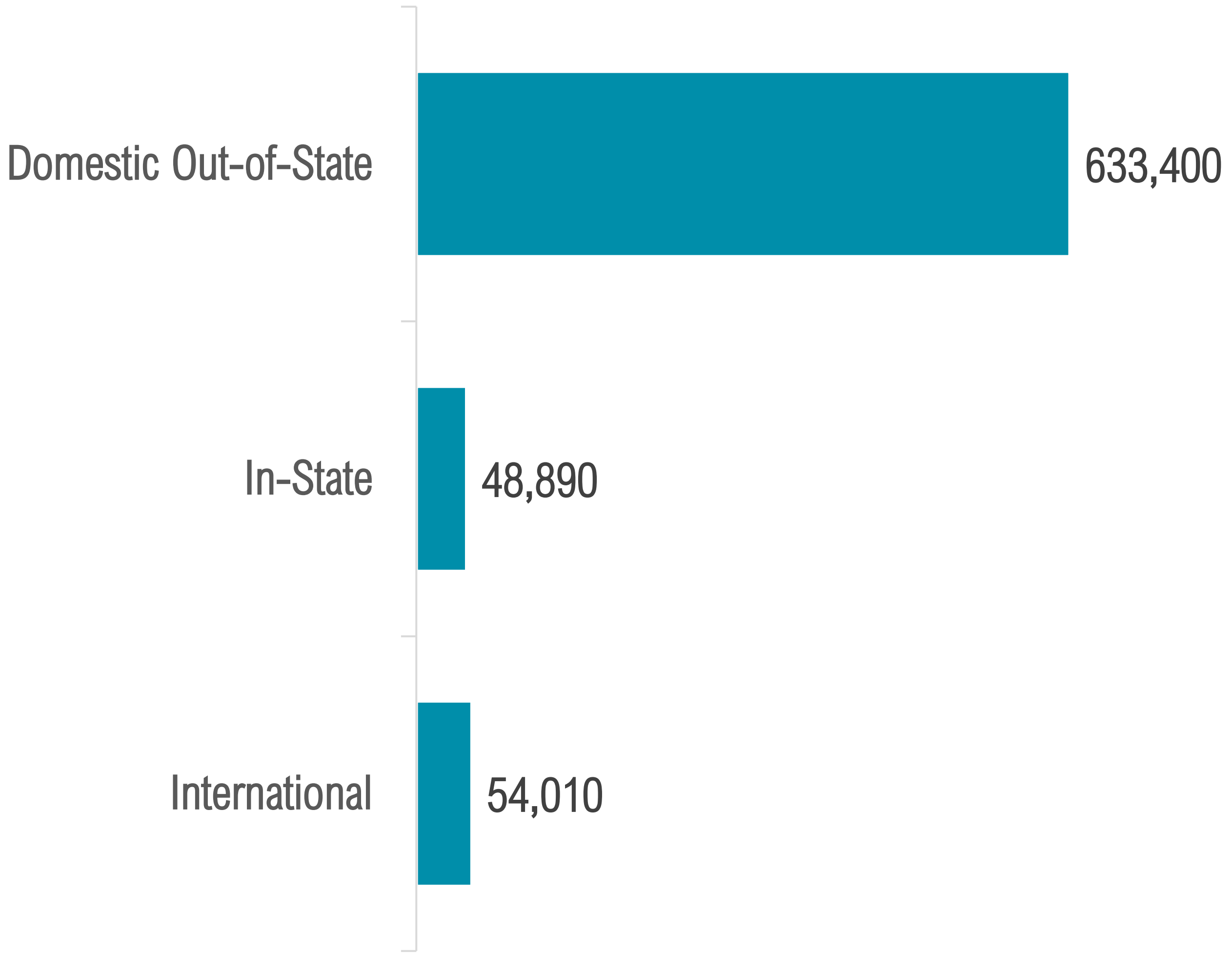
[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers. Based on data from the Visitor Tracking Study.

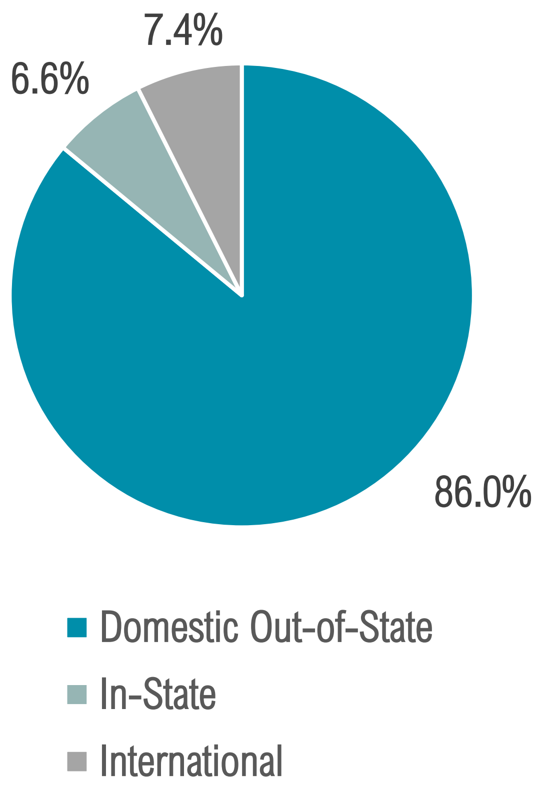
NUMBER OF VISITORS BY ORIGIN[1]



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

NUMBER OF VISITORS BY ORIGIN

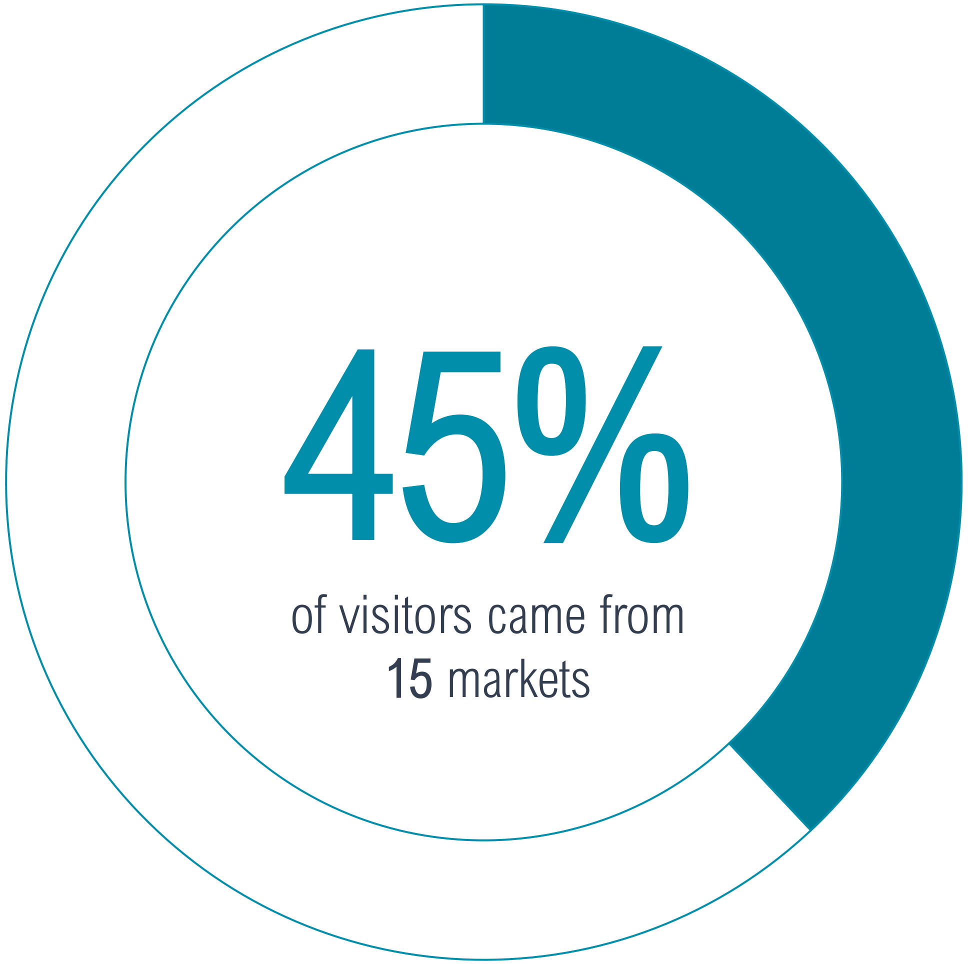




[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers. Based on data from the Visitor Tracking Study.

ORIGIN MARKETS[1]

Market [2]	Percentage of Visitors
MINNEAPOLIS-SAINT PAUL	6%
NEW YORK	4%
DETROIT	4%
BOSTON	4%
ATLANTA	4%
CHICAGO	4%
NAPLES & SURROUNDING AREAS	3%
MILWAUKEE	2%
WASHINGTON, DC-HAGERSTOWN	2%
PHILADELPHIA	2%
INDIANAPOLIS	2%
CLEVELAND-AKRON	2%
CINCINNATI	2%
NASHVILLE	2%
SAINT LOUIS	2%



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

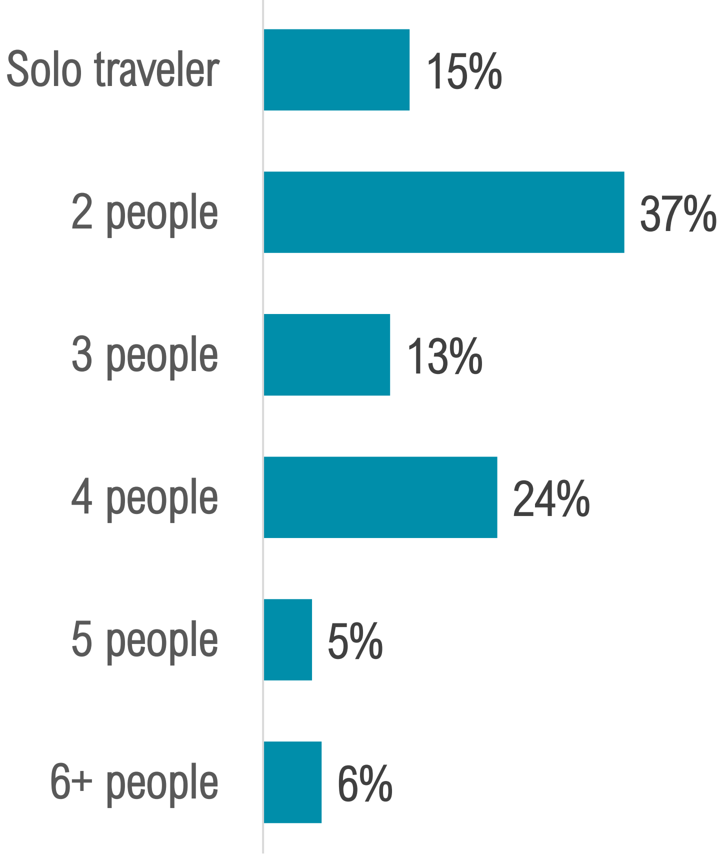
TRAVEL PARTY SIZE AND COMPOSITION

Travel Party Size

Visitors traveled in a party composed of **2.9**[1] **people**.

Travel with Children

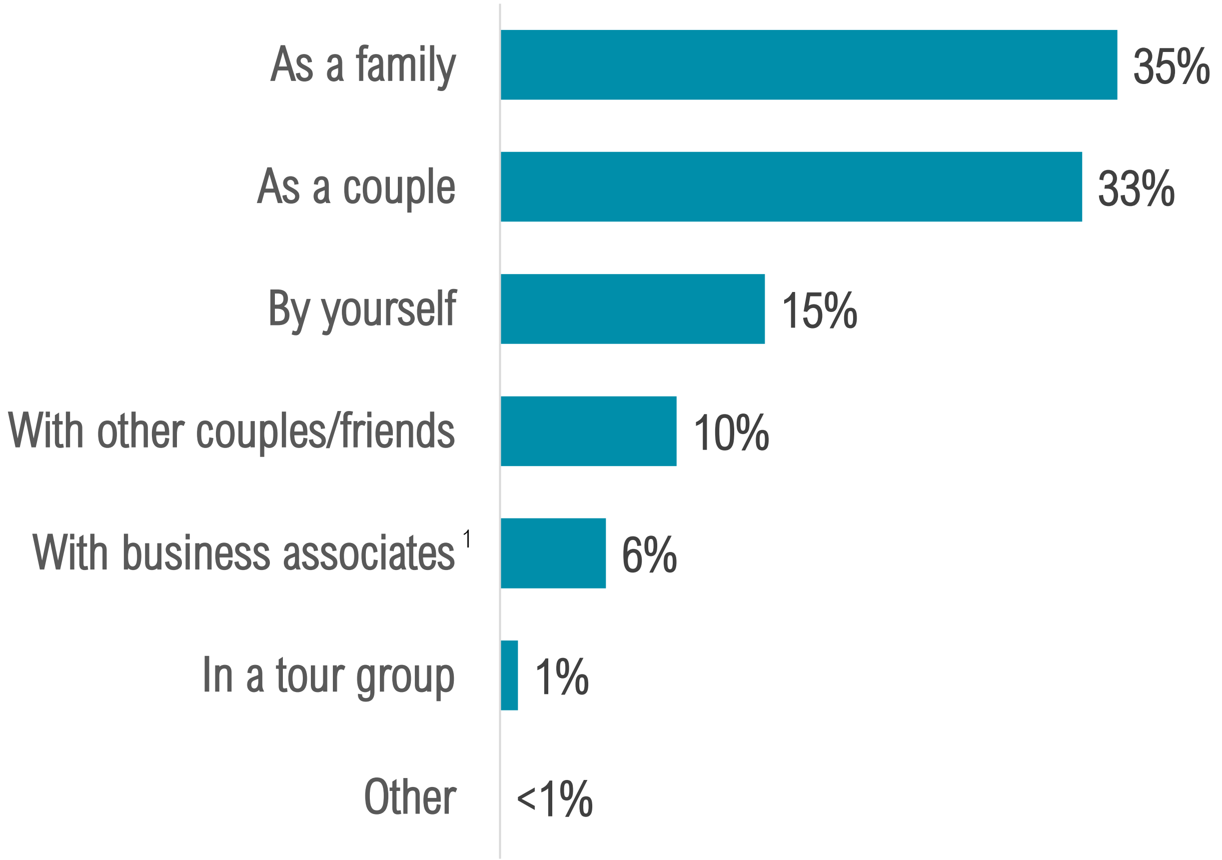
30% of visitors **traveled with children** under the age of 18.



[1]Sources: Occupancy Study and Visitor Tracking Study

TRAVEL PARTY TYPE

Roughly **1 in 3** visitors traveled either as a **family** or a **couple**, while over **1 in 7** visitors traveled **by themself**.



[1] Due mostly to ongoing Hurricane Ian recovery/rebuilding efforts.

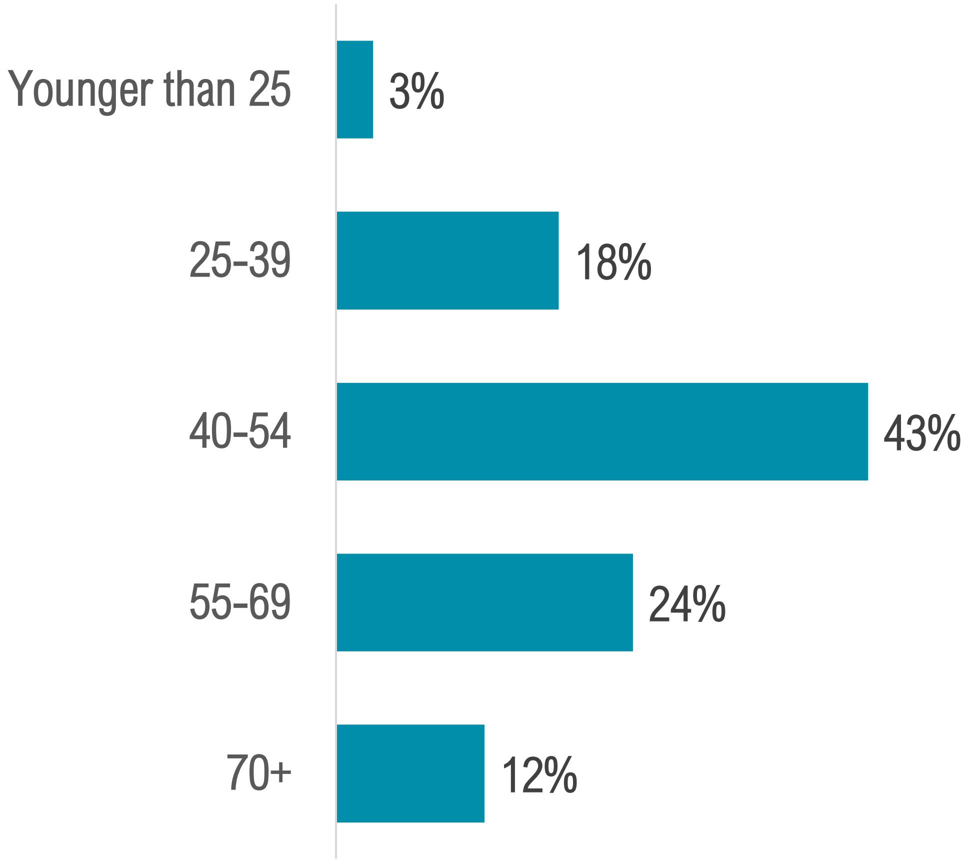
AGE

Average Age

The average age of January - March visitors was **49 years old.**

Median Age

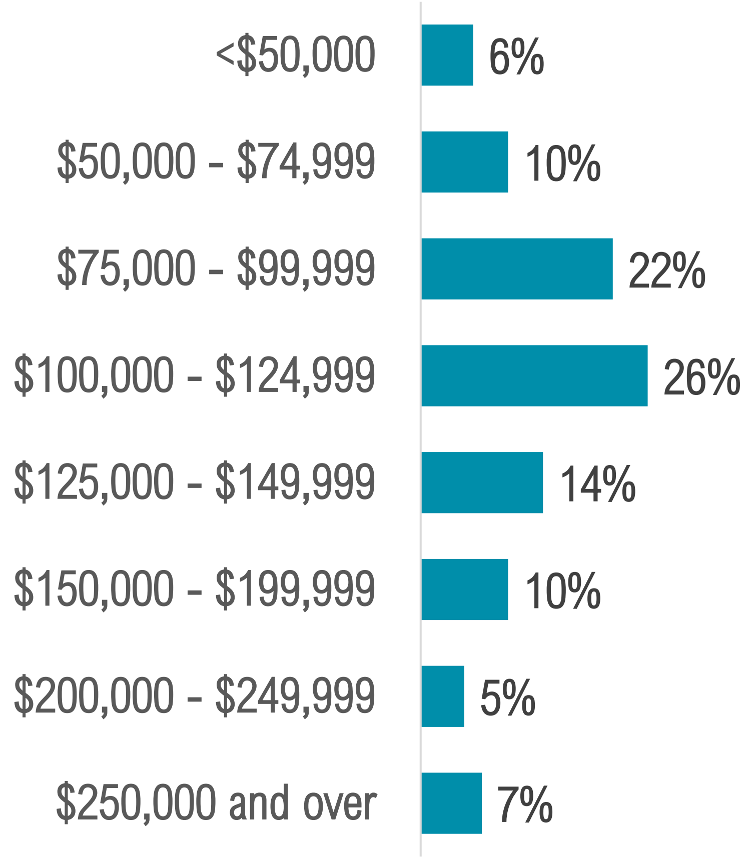
The median age of January - March visitors was **50 years old.**



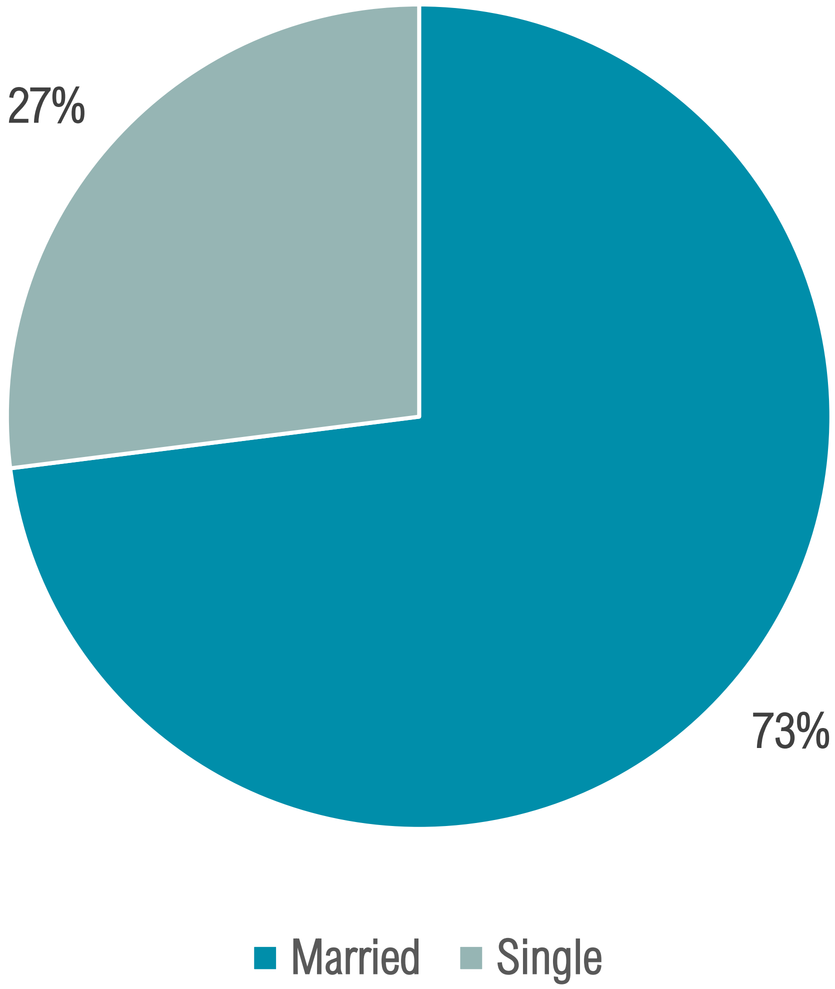
HOUSEHOLD INCOME

Median Household Income
January - March visitors had a median household income of **$111,500.**

12% of visitors had a household income in excess of **$200,000.**

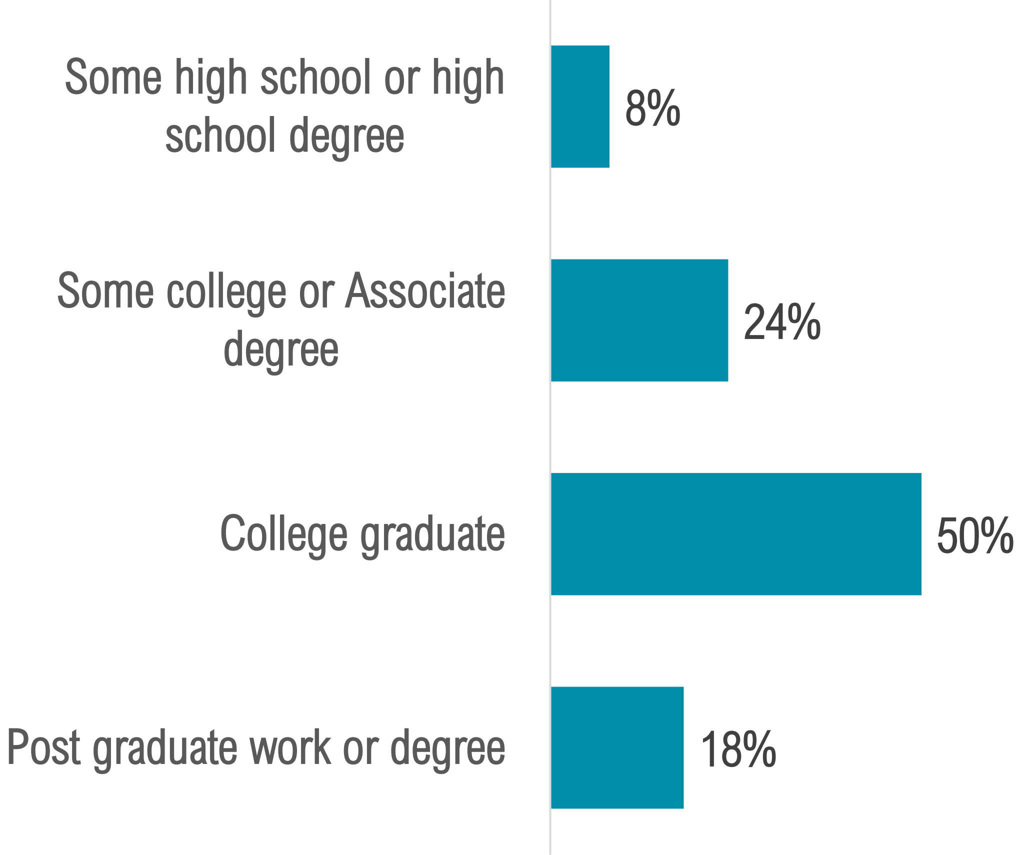


MARITAL STATUS

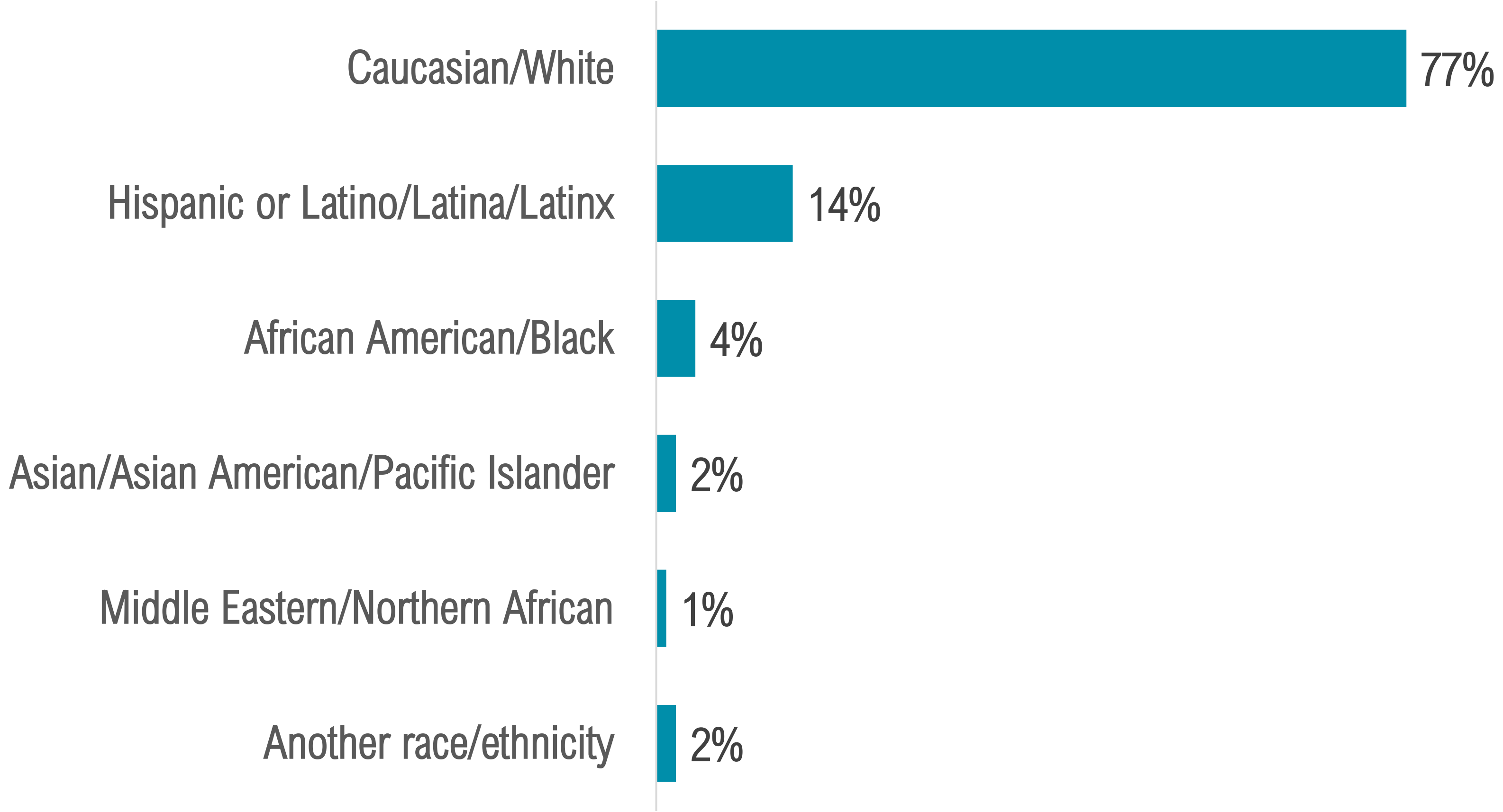


EDUCATION

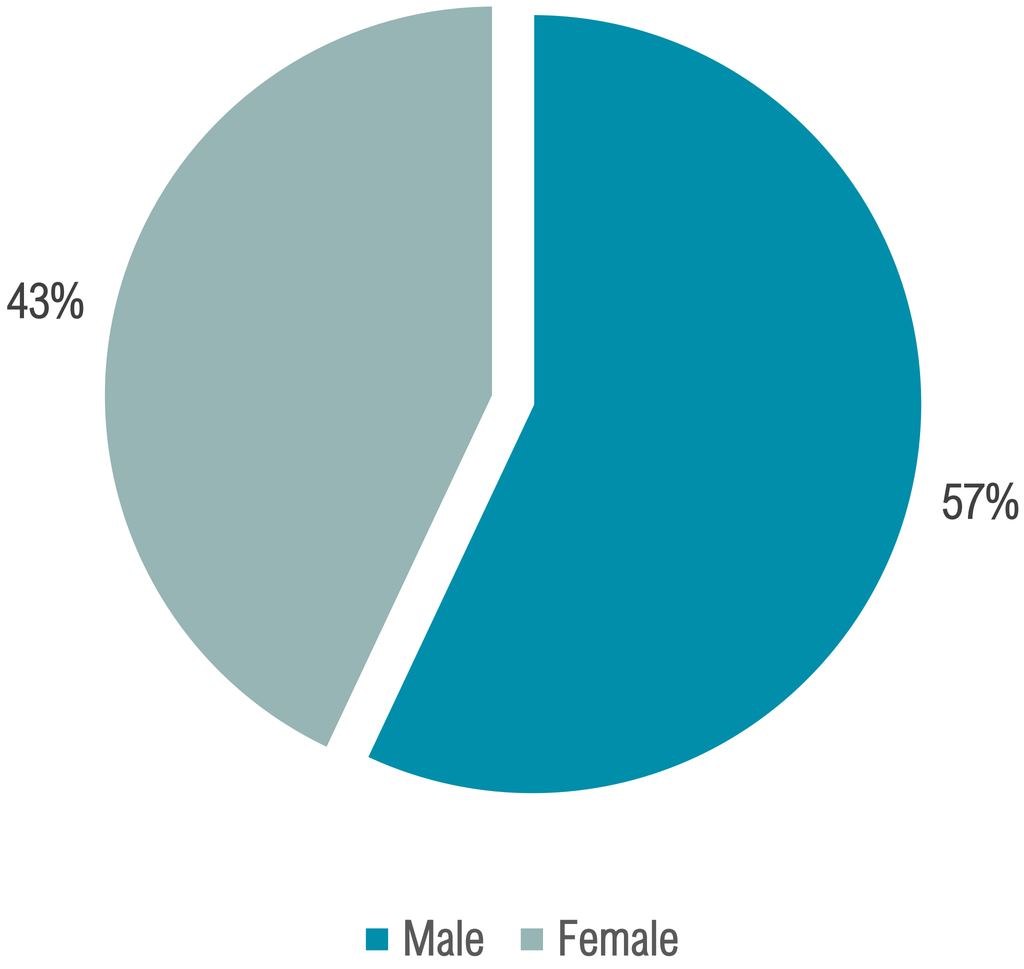
Education Level
Over 2 in 3 of January - March visitors had achieved a bachelor's degree or higher.



RACE/ETHNICITY



GENDER[1]

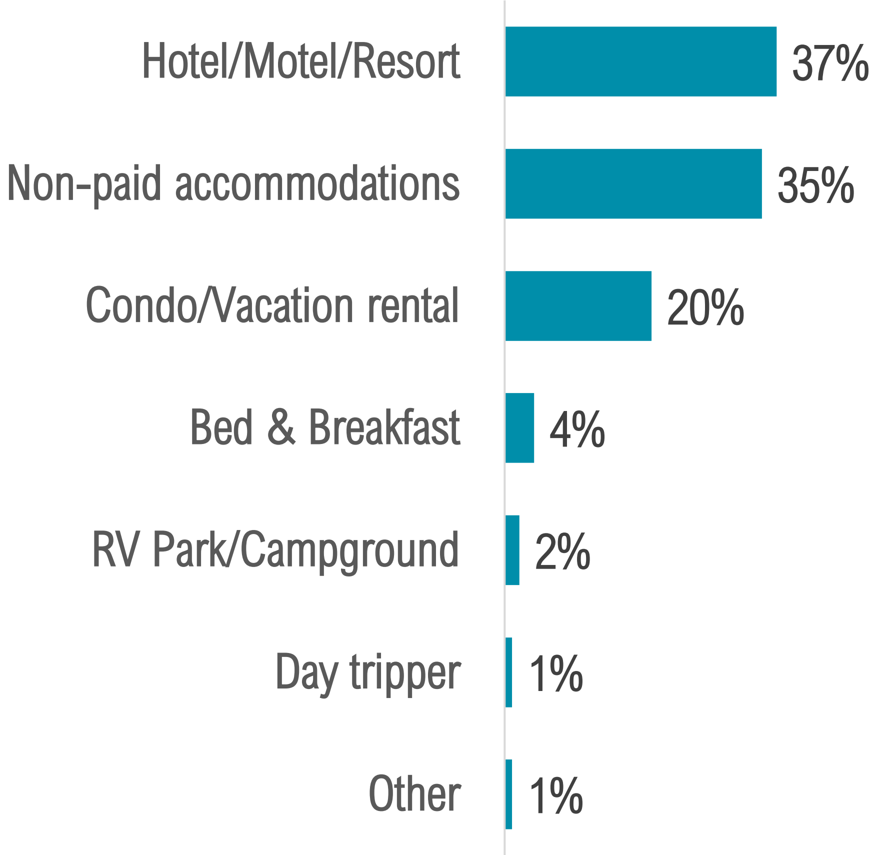


[1]Gender of person interviewed.

VISITOR JOURNEY: TRIP EXPERIENCE

ACCOMMODATIONS

Nearly 2 in 3 visitors stayed in paid accommodations



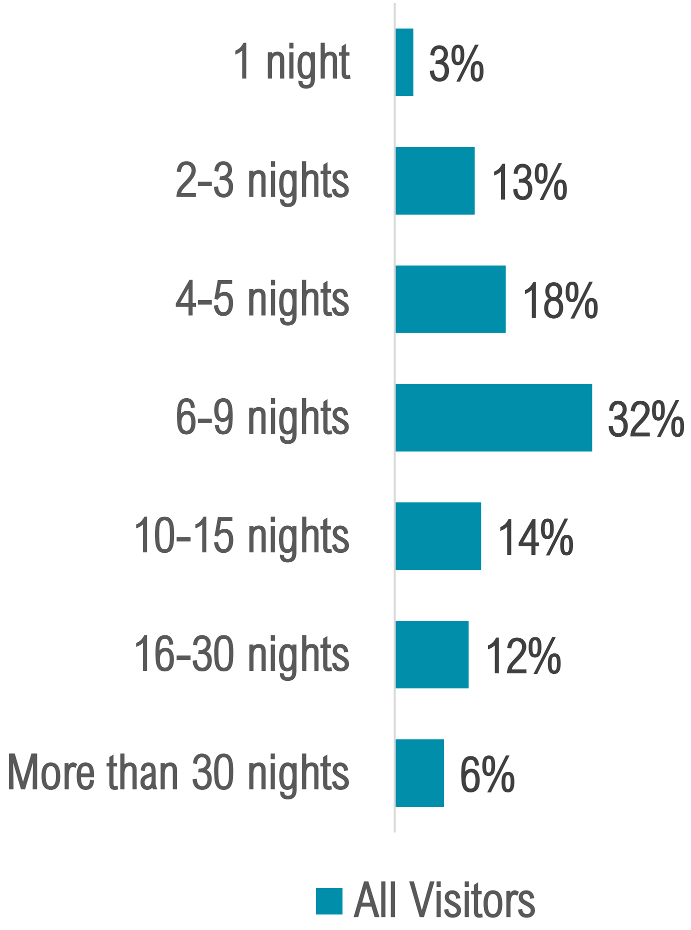
NIGHTS STAYED

All Visitors

Visitors spent an average of **8.3[1] nights** in the Fort Myers area.

Visitors Staying in Paid Accommodations

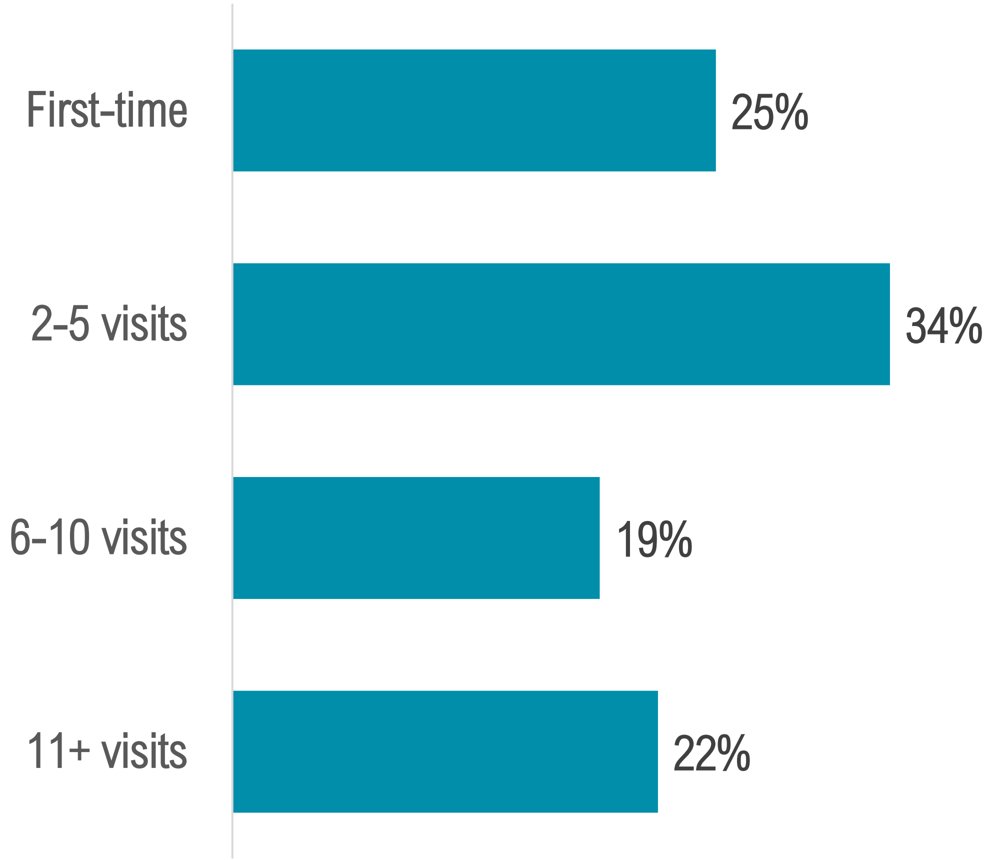
Visitors staying in paid accommodations spent an average of **8.1[2] nights** in the Fort Myers area.



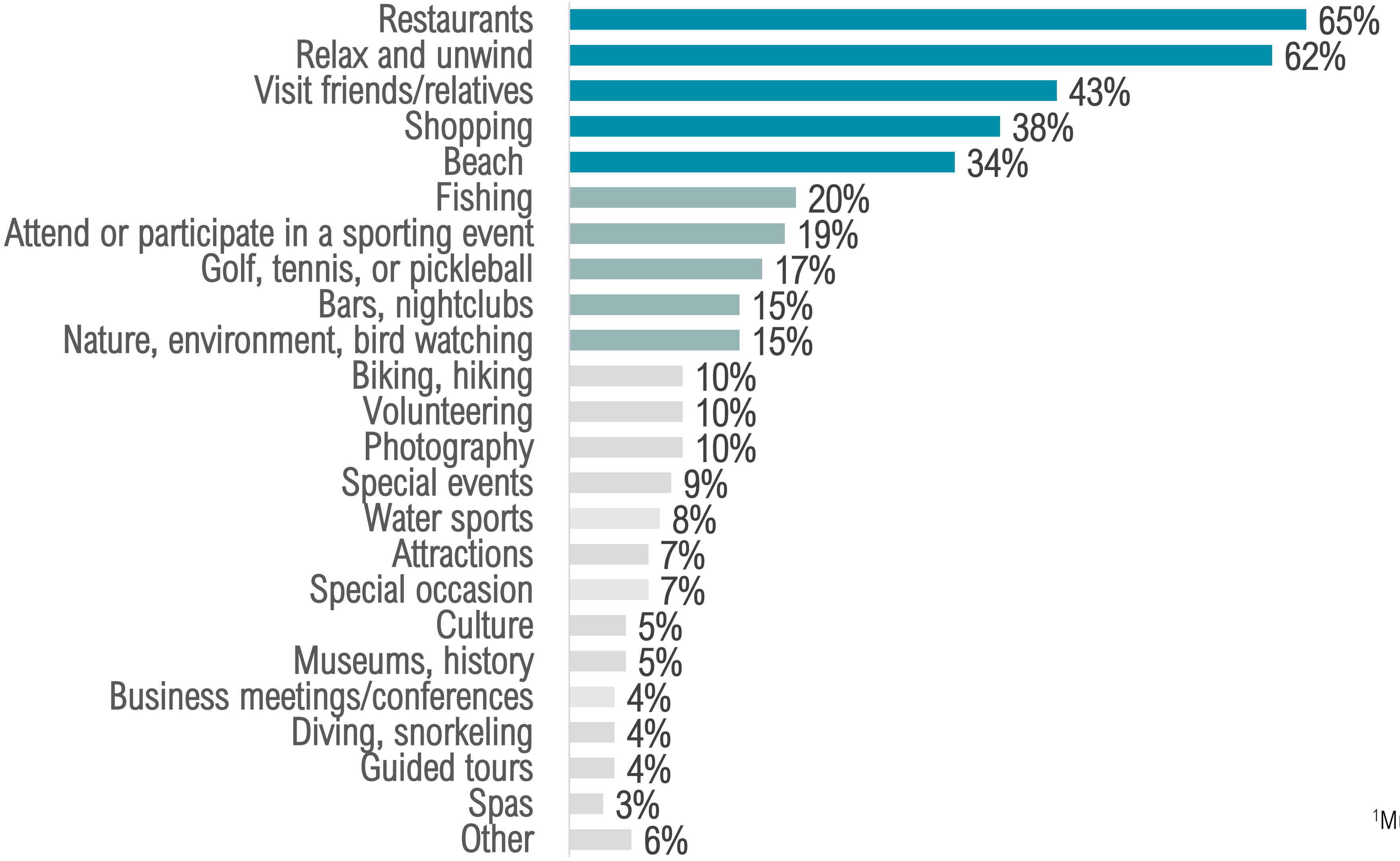
[1]Sources: Occupancy Study and Visitor Tracking Study
[2]Source: Occupancy Study

FIRST TIME AND EXPERIENCED VISITORS

1 in 4 visitors were visiting for the first time, while over 1 in 5 were highly loyal visitors, having visited more than 10 times.

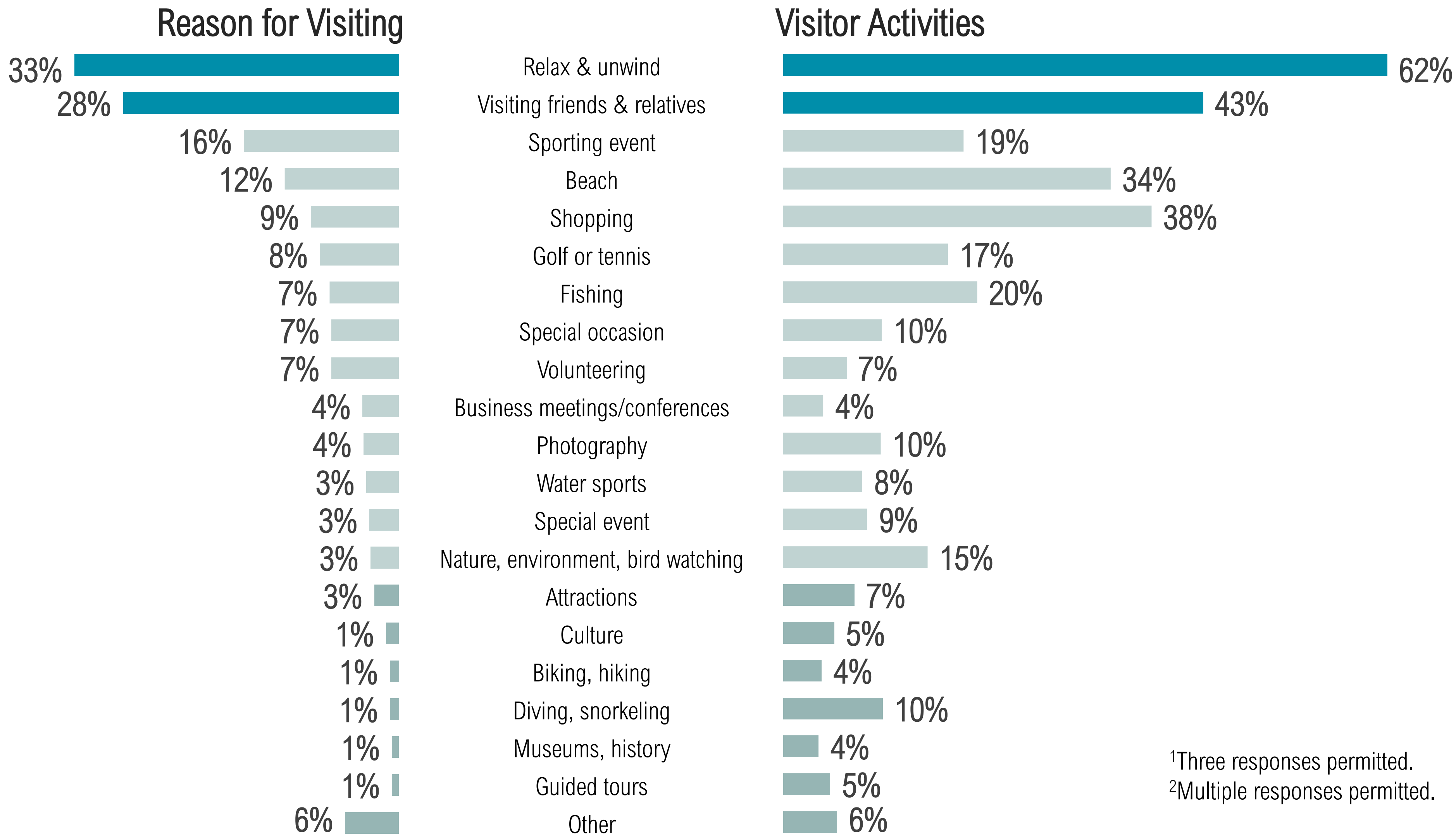


VISITOR ACTIVITIES[1]



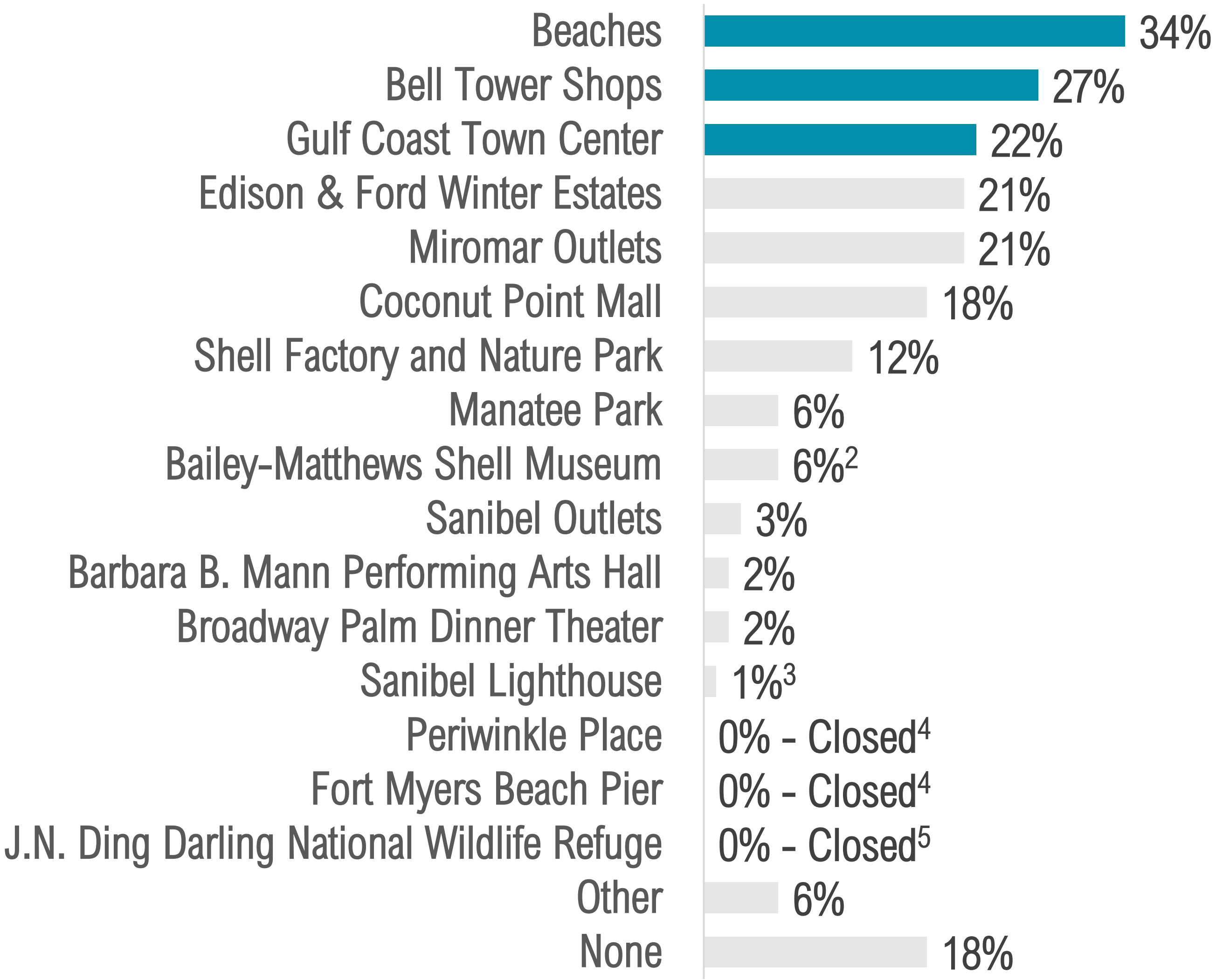
[1]Multiple responses permitted.

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



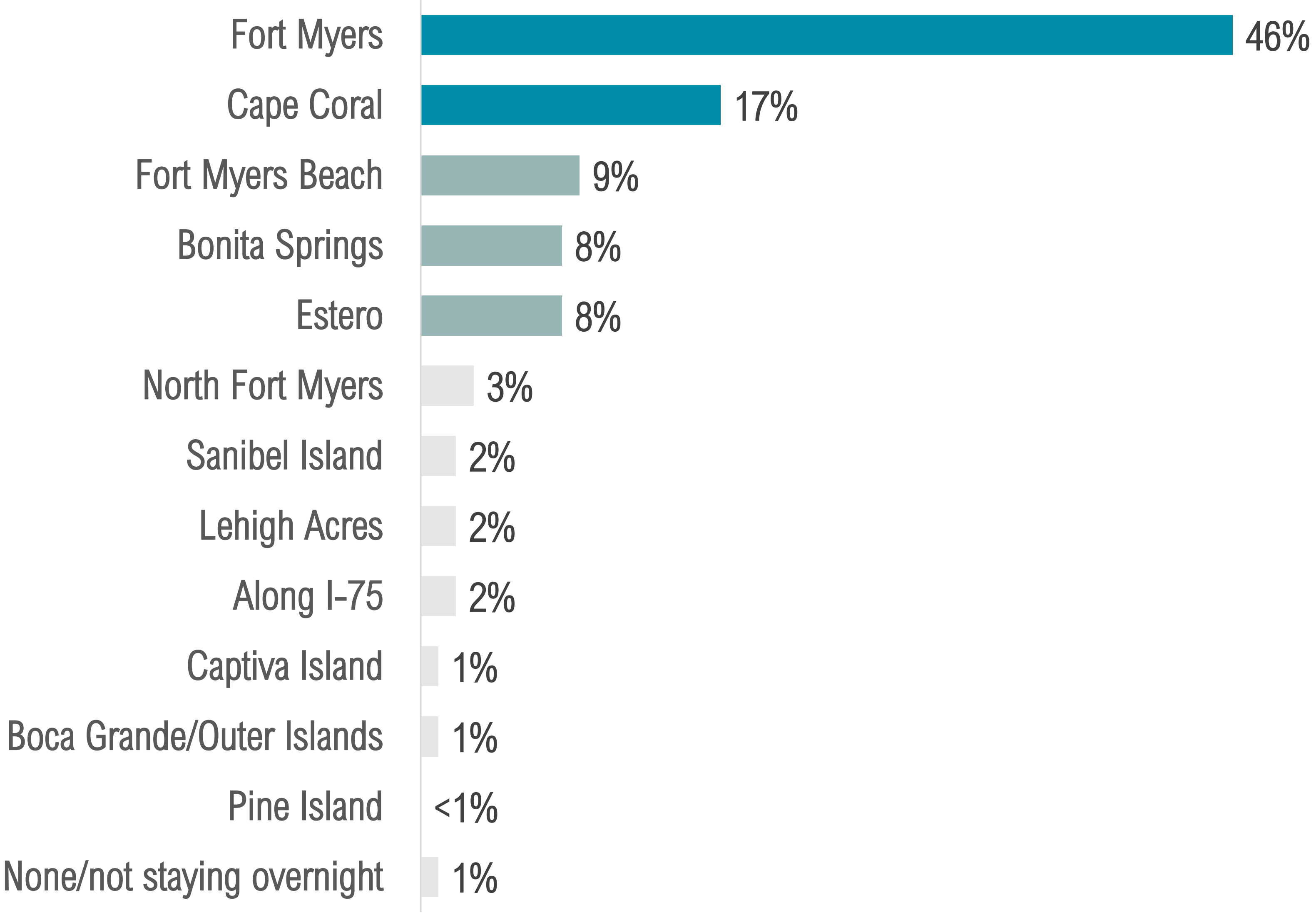
[1]Three responses permitted.
[2]Multiple responses permitted.

ATTRACTIONS VISITED[1]



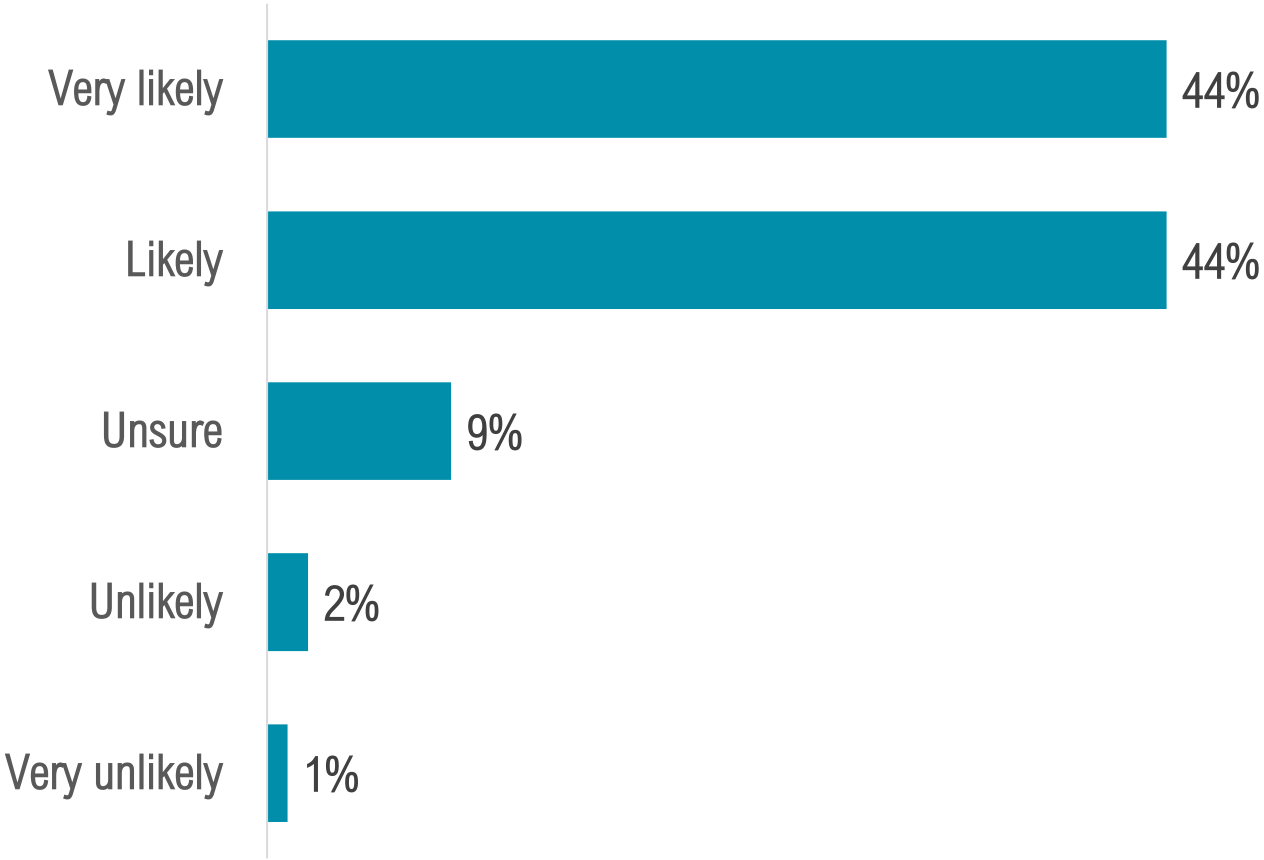
[1]Multiple responses permitted.
[2]Reopened in February 2023.
[3]Reopened for a few hours on Feb 28th.
[4]Closed due to Hurricane Ian.
[5]Reopened in April 2023.

COMMUNITY STAYED

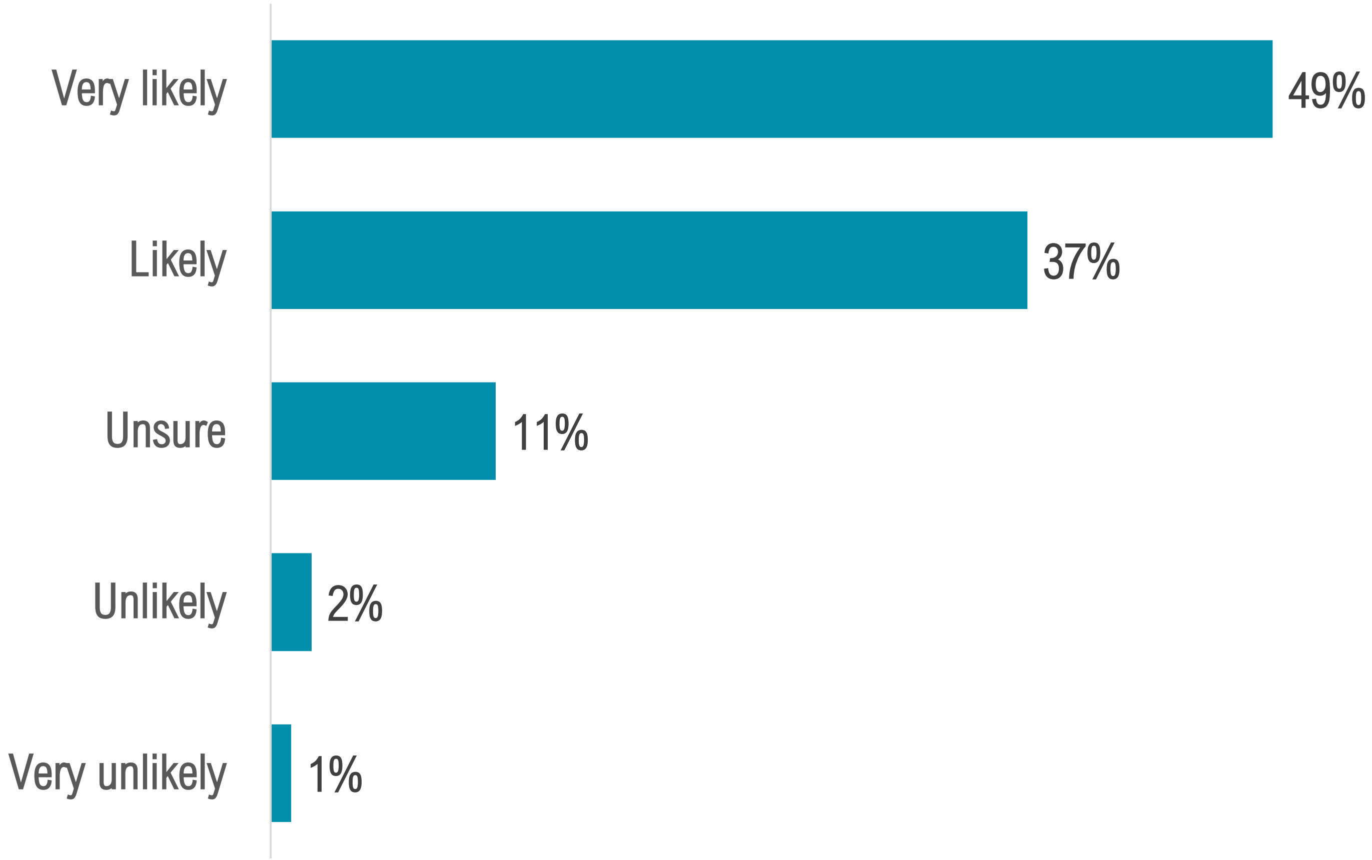


VISITOR JOURNEY: POST-TRIP EVALUATION

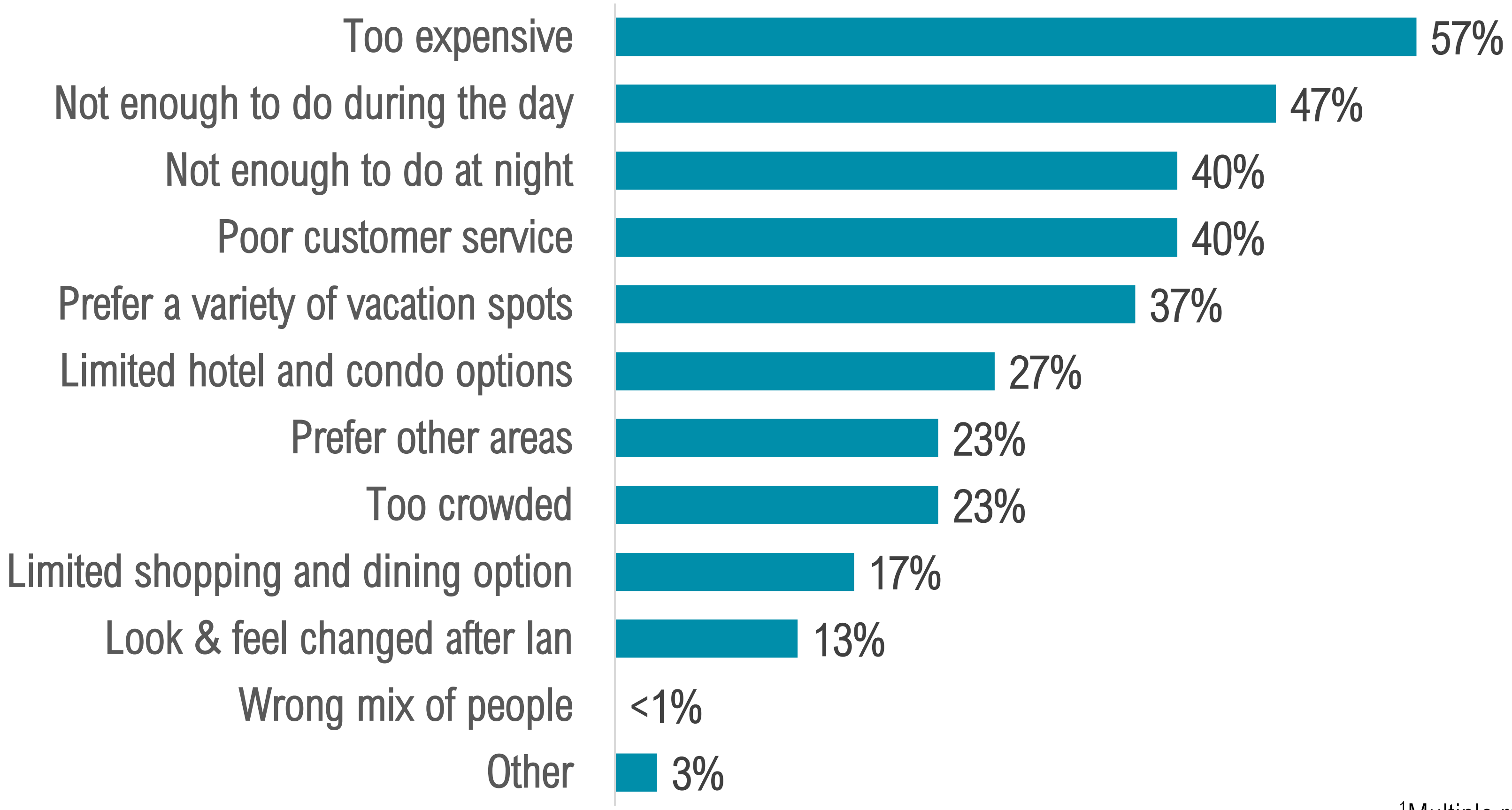
LIKELIHOOD OF RECOMMENDING THE AREA



LIKELIHOOD OF RETURNING TO THE AREA

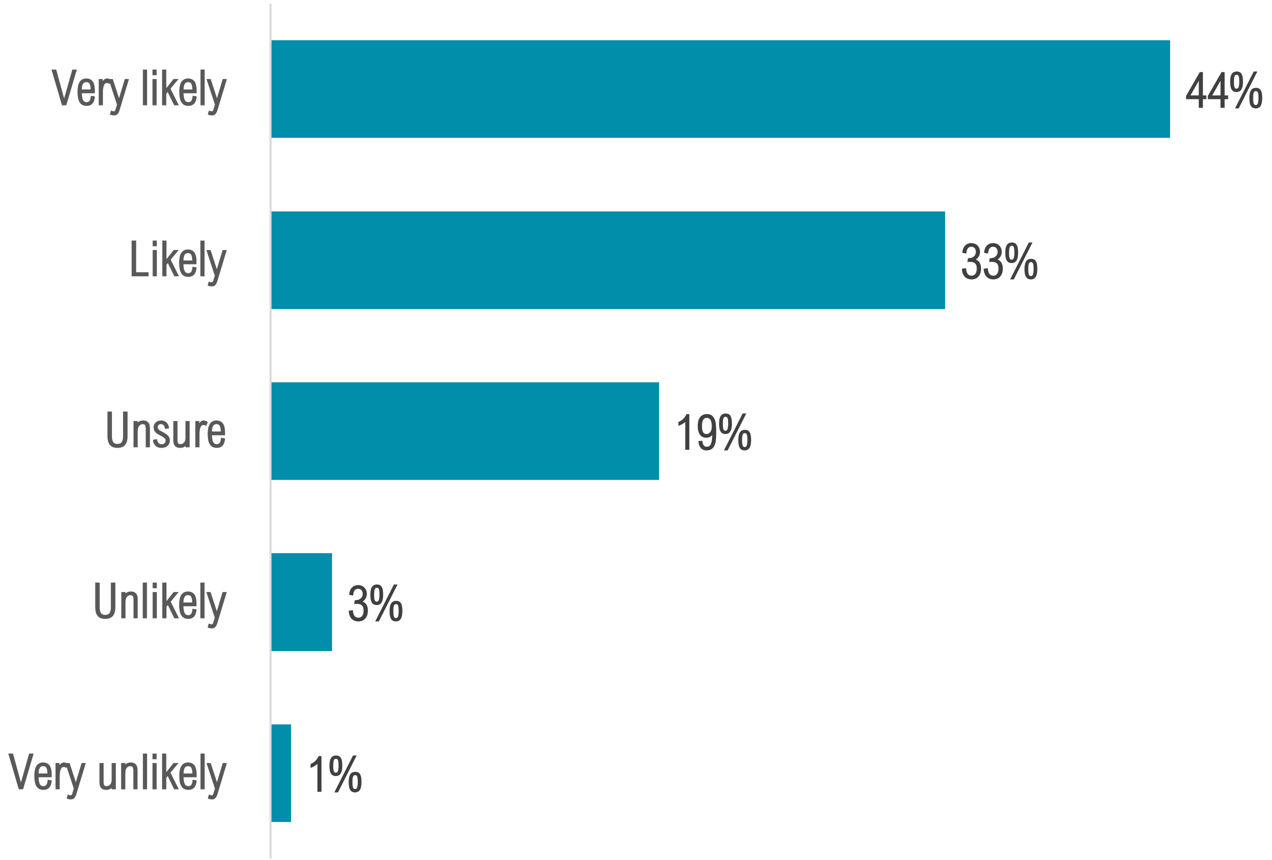


REASONS FOR NOT RETURNING[1,2]

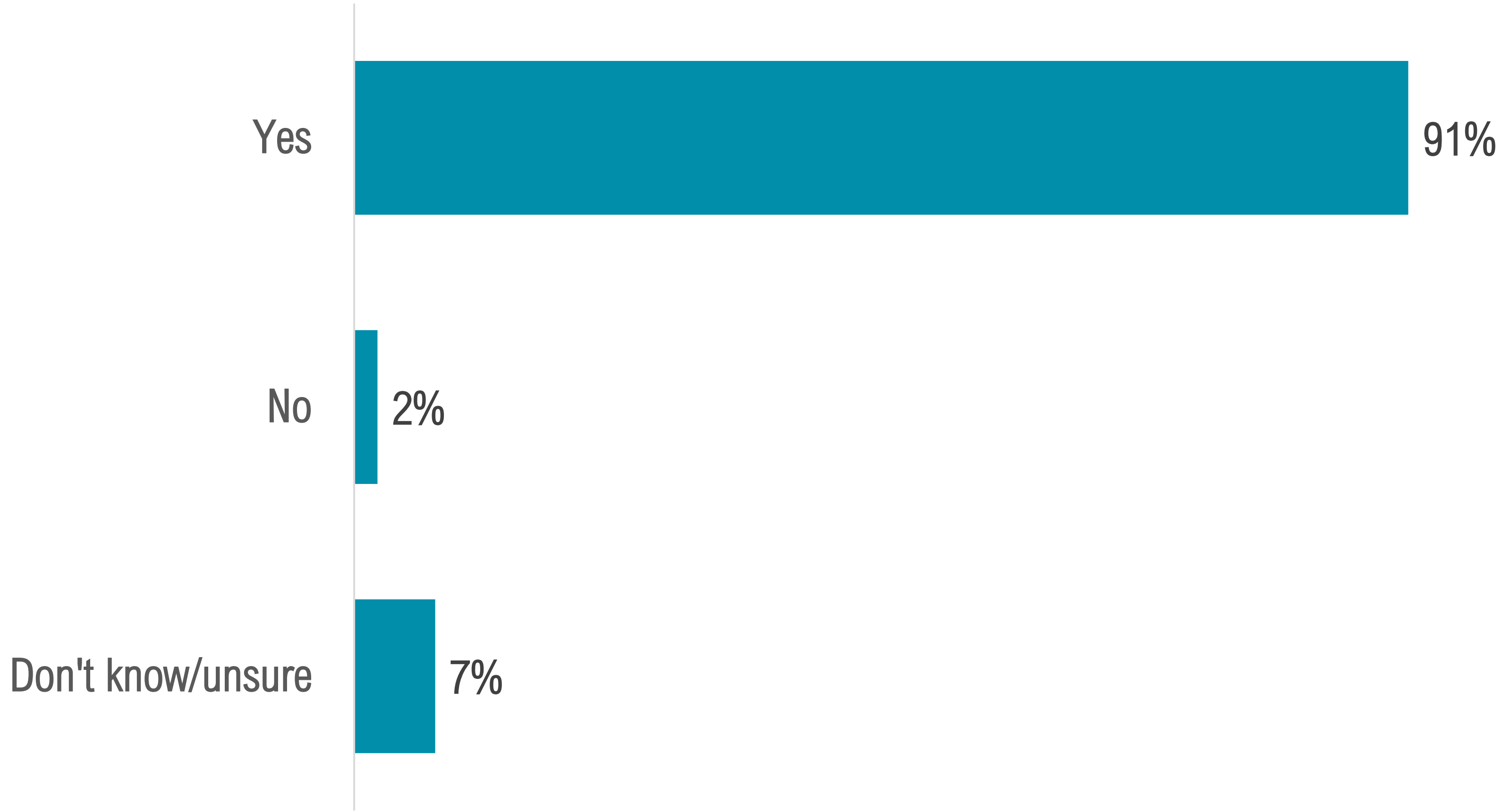


[1]Multiple responses permitted.
[2]Only asked of respondents who said they were "very unlikely" or "unlikely" to return to the area.

LIKELIHOOD OF RETURNING NEXT YEAR



FEELING OF WELCOMENESS



SATISFACTION RATINGS

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
Likelihood of Recommending	**2022**	**2023**	**2022**	**2023**	**2022**	**2023**	**2022**	**2023**
Very Likely	92%	34%	96%	47%	94%	44%	95%	43%
Likely		39%		46%		44%		40%
Unsure/unlikely	8%	27%	4%	7%	6%	12%	5%	17%

SATISFACTION RATINGS

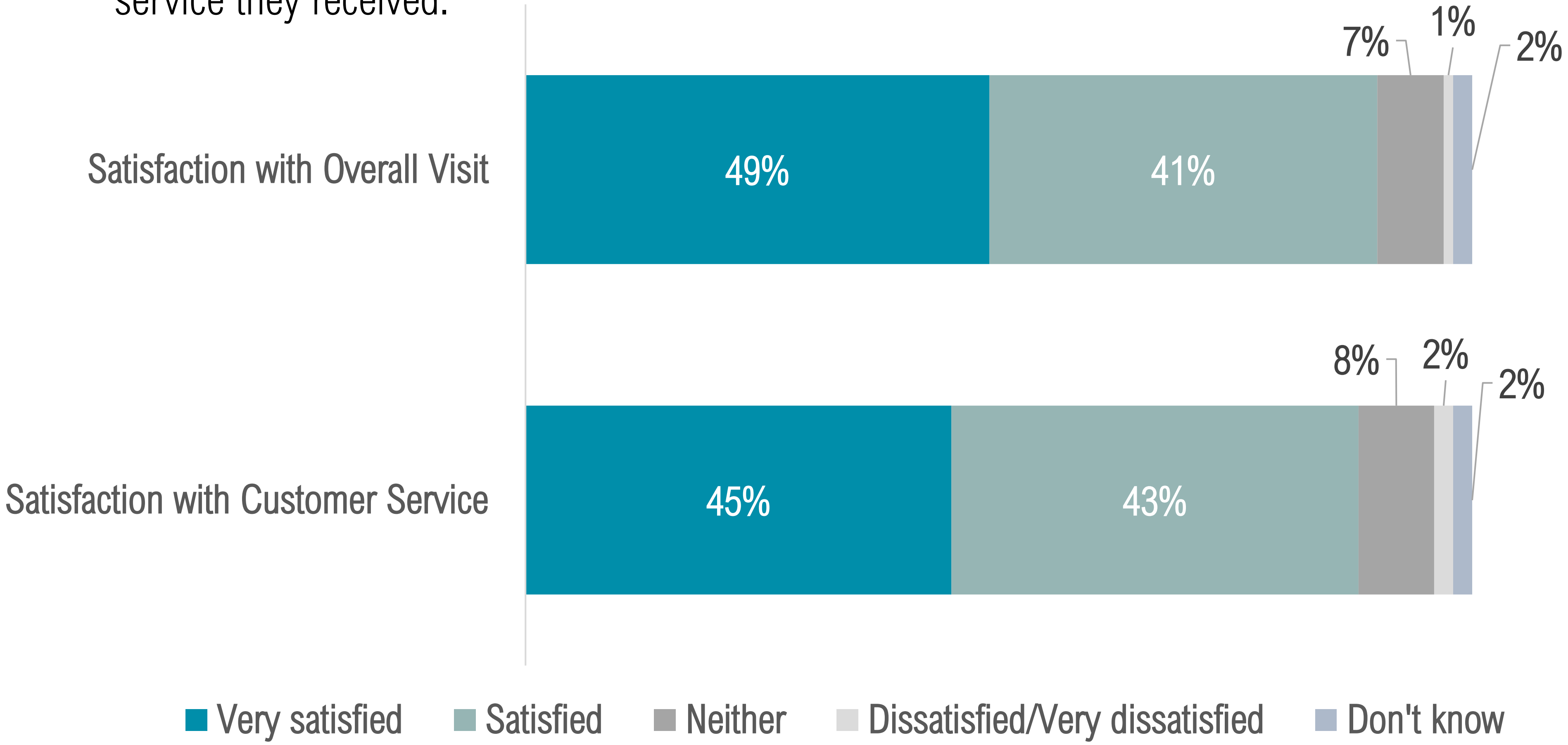
<table>
<tr><th></th><th colspan="2">1st Time Visitors</th><th colspan="2">Repeat Visitors</th><th colspan="2">U.S. Residents</th><th colspan="2">International Residents</th></tr>
<tr><th>Likelihood of Returning</th><th>2022</th><th>2023</th><th>2022</th><th>2023</th><th>2022</th><th>2023</th><th>2022</th><th>2023</th></tr>
<tr><td>Very Likely</td><td rowspan="2">82%</td><td>28%</td><td rowspan="2">94%</td><td>55%</td><td rowspan="2">90%</td><td>48%</td><td rowspan="2">84%</td><td>60%</td></tr>
<tr><td>Likely</td><td>33%</td><td>38%</td><td>38%</td><td>29%</td></tr>
<tr><td>Unsure/unlikely</td><td>18%</td><td>39%</td><td>6%</td><td>7%</td><td>10%</td><td>14%</td><td>16%</td><td>11%</td></tr>
</table>

SATISFACTION RATINGS

Likelihood of Returning Next Year	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2022	2023	2022	2023	2022	2023	2022	2023
Very Likely	37%	25%	73%	48%	61%	43%	61%	56%
Likely		29%		33%		34%		19%
Unsure/unlikely	63%	46%	27%	19%	39%	23%	39%	25%

SATISFACTION

- Compared to 2022, visitors were less likely to be **very satisfied** with their overall visit or the customer service they received.



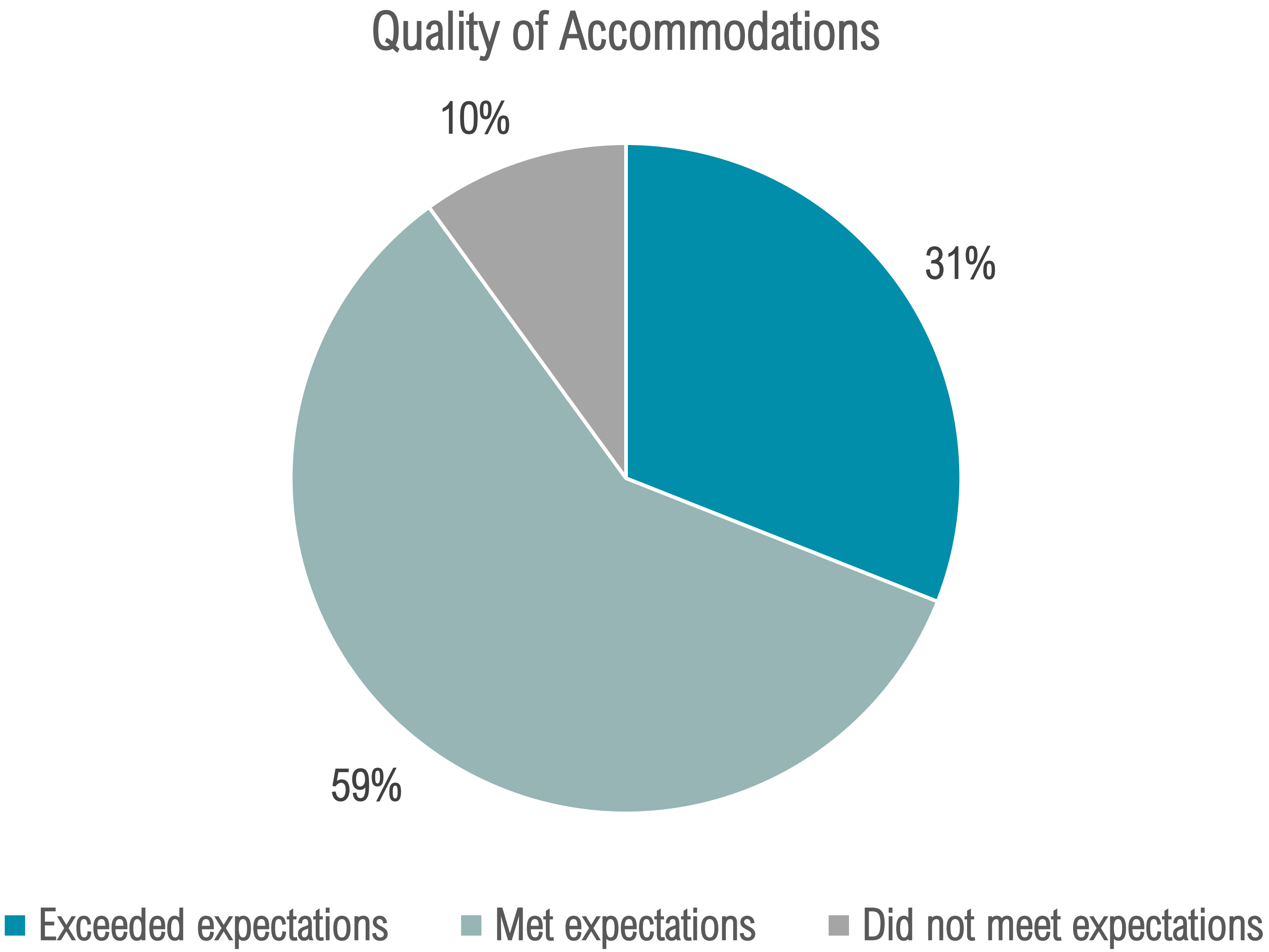
SATISFACTION RATINGS: OVERALL VISIT

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2022	2023	2022	2023	2022	2023	2022	2023
Very Satisfied	45%	36%	66%	52%	58%	43%	51%	65%
Satisfied	50%	43%	31%	41%	38%	43%	45%	26%
Unsure/unsatisfied	5%	21%	3%	7%	4%	14%	4%	9%

SATISFACTION RATINGS: CUSTOMER SERVICE

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2022	2023	2022	2023	2022	2023	2022	2023
Very Satisfied	54%	33%	65%	49%	63%	45%	59%	56%
Satisfied	37%	43%	29%	43%	31%	44%	32%	32%
Unsure/unsatisfied	9%	24%	6%	8%	6%	11%	9%	12%

SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

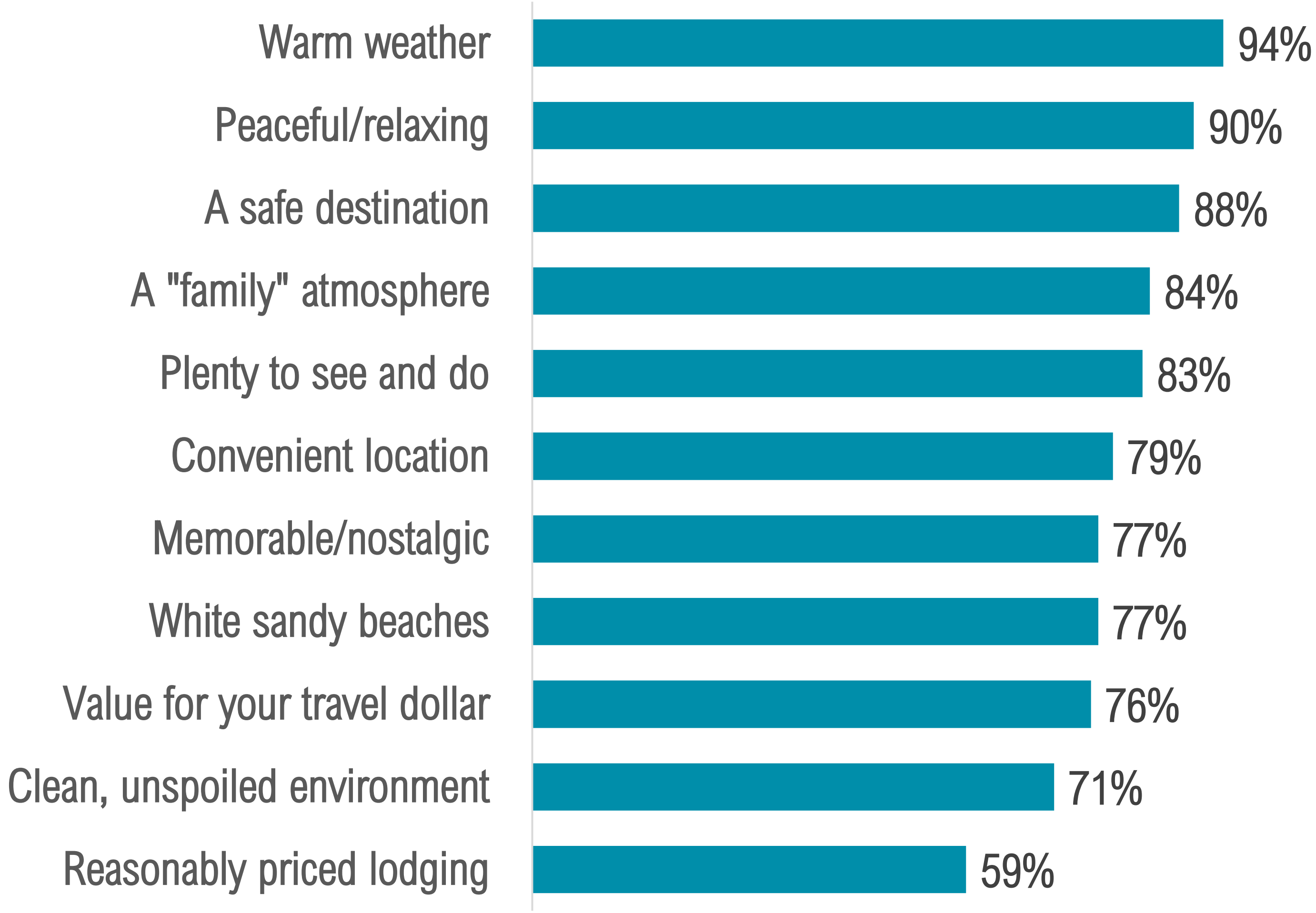


SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2022	2023	2022	2023	2022	2023	2022	2023
Exceeded Expectations	42%	28%	40%	33%	41%	29%	35%	31%
Met Expectations	54%	53%	57%	62%	56%	52%	60%	60%
Did Not Meet Expectations	4%	19%	3%	5%	3%	19%	5%	9%

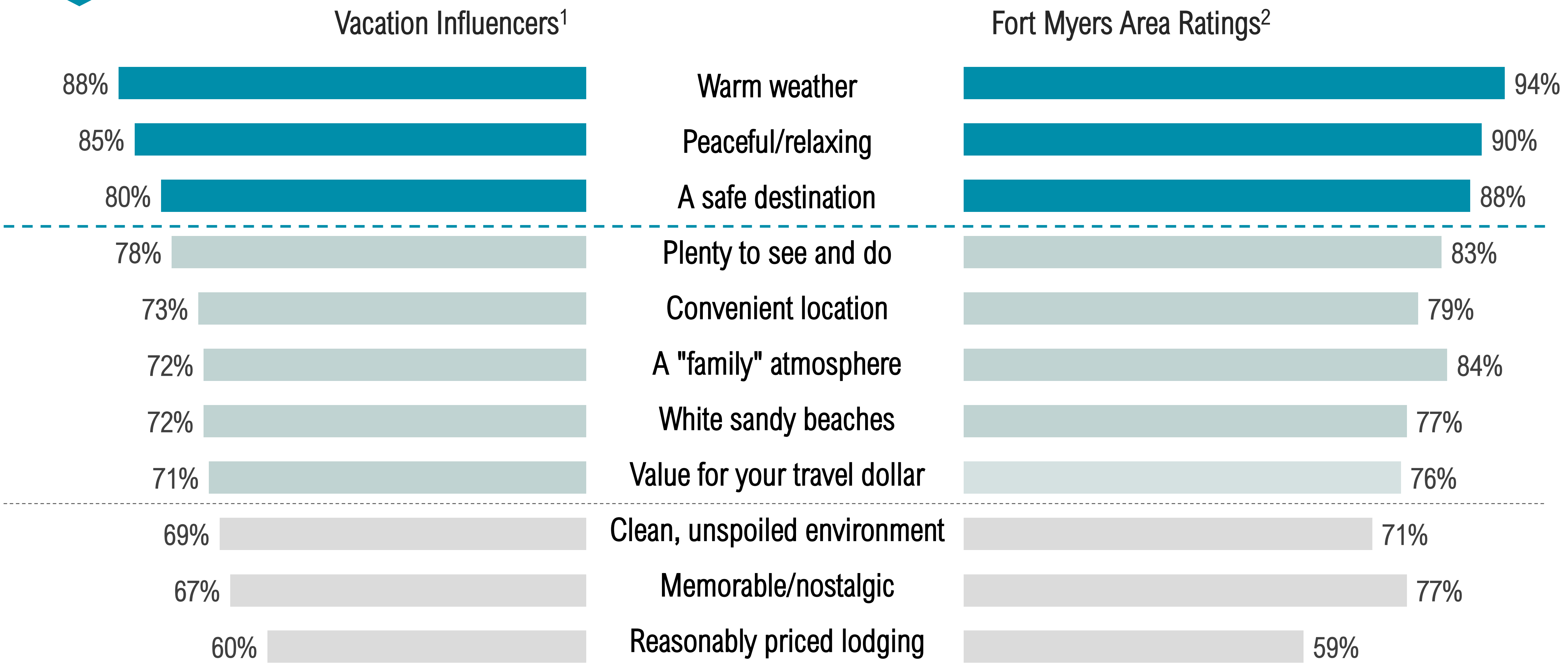
ATTRIBUTE RATINGS[1]

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



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

VACATION ATTRIBUTE INFLUENCE VS. RATINGS



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

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

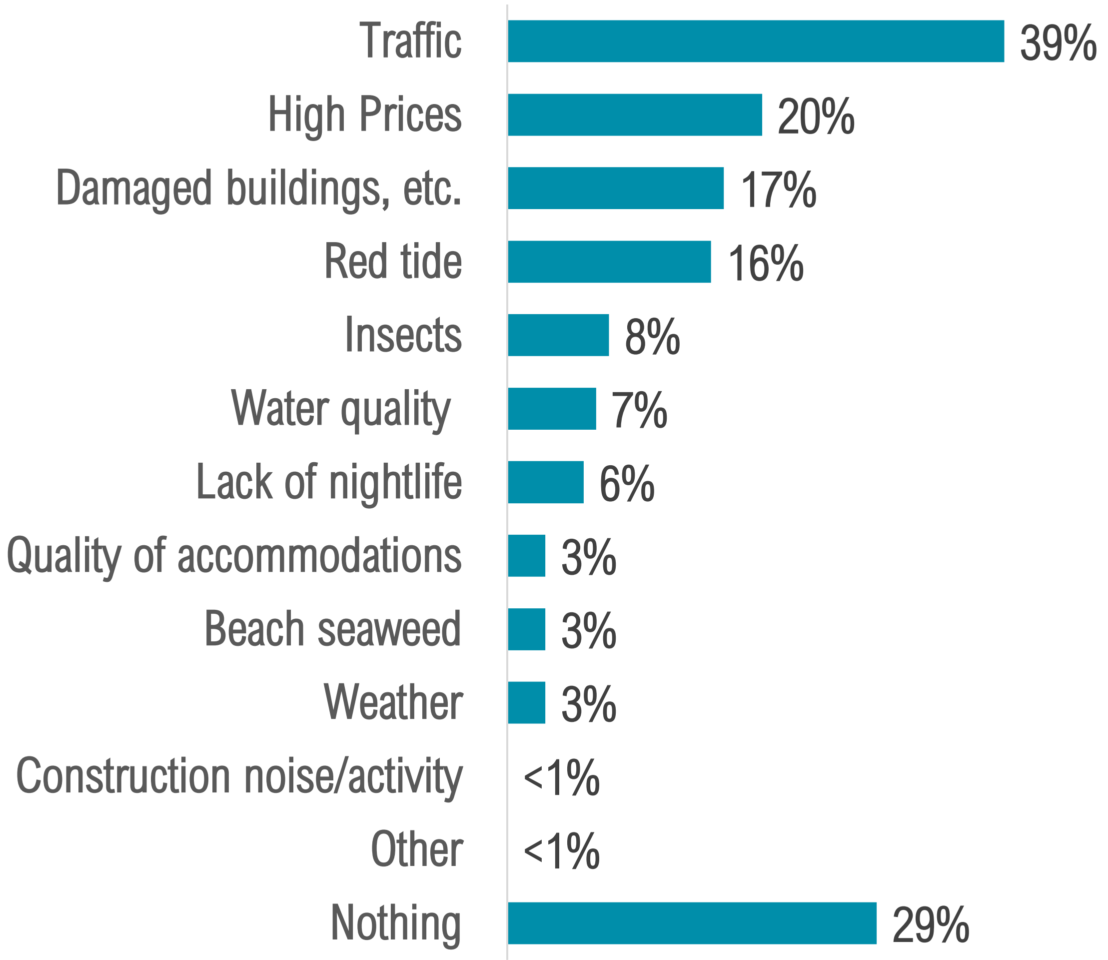
Post-Trip Evaluation
Jan - Mar 2023

fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

downs & st. germain RESEARCH

LEAST LIKED FEATURES[1]

Nearly **2 in 5** visitors were concerned about **Traffic,** while **1 in 5** were concerned with **high prices** and nearly **1 in 10** 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

- "Always a favorite destination for us with its' beautiful warm days, chilly nights, as well as golf courses which surprisingly weren't damaged much by the hurricane."
- "An awesome place to vacation with beautiful warm water, great weather, swaying palm trees, and the golf courses are unbelievably great."
- "Great time of year to visit with warm days that cool off at night thanks to a nice ocean breeze."

Peaceful & Relaxing

- "Quiet and friendly, a very relaxing destination."
- "Still the most beautiful place in the world to relax, fish, get in the water, or go to some great restaurants."
- "I'm working busy days volunteering to help with recovery and then in the evenings I get to relax, unwind, and enjoy great food at local restaurants."

AREA DESCRIPTIONS

Safe

- “We’ve had a wonderful time on vacation here. Downtown is very nice and safe with a lot to do as well.”
- “Nice city, clean and safe. The downtown River District is fun and a bit artsy. It’s quaint.”
- “Peaceful, safe, and has amazing weather, what more could you need?”

“Family” Atmosphere

- “Still the best place to vacation in a tropical environment, but with a great family atmosphere.”
- “Very family friendly area with some really nice parks.”
- “Wonderful time of year to take the family down for some spring training games. Perfect weather too.”

OCCUPANCY BAROMETER[1]: APR – JUN RESERVATIONS

Apr – Jun Reservations	Apr – Jun 2022	Apr – Jun 2023
Up	43%	29%
Same	42%	13%
Down	12%	58%
Not Sure	3%	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?"

OCCUPANCY BAROMETER[1]: JULY – SEPT RESERVATIONS

July – Sept Reservations	July – Sept 2022	July – Sept 2023
Up	41%	31%
Same	43%	10%
Down	14%	55%
Not Sure	2%	4%

[1]Sources: Occupancy Survey

Accommodations partners were asked the following, "Please think about your reservations for the next three months. Compared to July – September 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	January - March 2022	January - March 2023	% Change '22 – '23
Visitors	1,126,500	736,300	- 34.6%
Visitor Days	8,561,400	6,111,300	- 28.6%
Room Nights	1,985,900	1,378,600	- 30.6%
Direct Expenditures[1]	$1,410,763,600	$967,837,700	- 31.4%
Total Economic Impact[2]	$2,247,346,400	$1,549,508,200	- 31.1%
Occupancy	90.0%	70.9%	- 21.2%
ADR	$235.29	$193.35	- 17.8%
RevPAR	$211.84	$137.07	- 35.3%

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

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

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM

	January - March 2022	January - March 2023	% Change '22 – '23
Direct Jobs	18,227	12,408	-31.9%
Total Jobs	25,138	17,217	-31.5%
Direct Wages	$415,573,800	$253,957,669	-38.9%
Total Wages	$683,756,400	$499,285,976	-27.0%
Direct Local Taxes	$43,451,500	$29,035,131	-33.2%
Total Local Taxes	$74,836,700	$51,908,525	-30.6%
Direct State Taxes	$100,587,400	$68,716,477	-31.7%
Total State Taxes	$146,526,900	$100,718,033	-31.3%

VISITOR TYPE

Visitor Type	January - March 2022	January - March 2023
Visitors in Paid Accommodations	73%	64%
Visitors in Non-Paid Accommodations	25%	35%
Day Trippers	2%	1%

PRE-VISIT

Planned trip in advance	January - March 2022	January - March 2023
1 week or less	5%	9%
2-4 weeks	17%	15%
1-2 months	29%	34%
3-6 months	24%	24%
6 months or more	23%	16%
Not sure	2%	2%

Considered Other Destinations	January - March 2022	January - March 2023
Yes	38%	58%
No	62%	42%

PRE-VISIT

Other destinations considered[1]	January - March 2022[2]	January - March 2023[3]
Tampa/Clearwater/St. Pete	16%	22%
Other destinations outside of FL	29%	20%
Orlando	8%	15%
Miami/Ft. Lauderdale	11%	14%
Sarasota/Siesta Key	8%	13%
Naples/Marco Island	5%	10%
Daytona Beach	5%	10%
Keys/Key West	8%	9%
Other destinations in FL	8%	8%
West Palm Beach	-	6%
Punta Gorda/Englewood	3%	5%

[1]Multiple responses permitted.
[2]Base: 38% of visitors who considered other destinations.
[3]Base: 58% of visitors who considered other destinations.

PRE-VISIT

Trip Planning Websites/Apps[1]	January - March 2022	January - March 2023
Online search engines	34%	29%
Airline websites/apps	23%	27%
Airbnb, VRBO, HomeAway etc.	24%	18%
Traveler reviews, blogs, stories	18%	15%
Trip Advisor	18%	12%
Hotel websites/apps	18%	12%
Vacation rental websites/apps	18%	11%
Booking websites	16%	7%
Visit Florida	8%	7%
VCB Social Media	6%	7%
Facebook	7%	7%
www.VisitFortMyers.com	8%	6%
YouTube, Hulu, Pandora	5%	4%
Instagram	6%	3%
None	17%	28%
Other	5%	4%

[1]Multiple responses permitted.

PRE-VISIT

Information Requests[1]	January - March 2022	January - March 2023
Calling a hotel, motel, condo	32%	25%
Requesting and receiving a visitor guide	11%	8%
Calling the VCB	5%	2%
Receiving the VCB e-newsletter	5%	2%
Calling a local Chamber of Commerce	4%	2%
Other	4%	3%
None	58%	69%

[1]Multiple responses permitted.

PRE-VISIT

Recall of Lee County Promotions	January - March 2022	January - March 2023
Yes	48%	50%
No	40%	32%
Can't recall	12%	18%
% of recallers influenced by promotions	58%	45%
% of total visitors influenced by promotions	28%	22%

PRE-VISIT

Type of Promotions Recalled[1]	January - March 2022[2]	January - March 2023[3]
Internet	44%	43%
Social media (FB, Instagram, TikTok, etc.)	32%	40%
Traveler reviews, blogs	24%	24%
Cable or satellite TV	19%	16%
Video streaming services (YouTube, Hulu, etc.)	-	10%
Travel/visitor guide	13%	8%
Email	-	7%
Newspaper	7%	6%
www.VisitFortMyers.com	6%	6%
Radio	5%	4%
Magazine	8%	3%
AAA	5%	3%
Billboard/signage	4%	3%
Brochure	5%	2%
Music streaming services (Pandora, Spotify, etc.)	-	1%
Deal-based promotion (LivingSocial, Groupon, etc.)	4%	<1%
Podcast	-	<1%
Other	5%	2%

[1]Multiple responses permitted.
[2]Base: 48% of visitors who recalled seeing a promotion.
[3]Base: 50% of visitors who recalled seeing a promotion.

PRE-VISIT

Characteristics influencing decision to visit Lee County (top 2 boxes)[1]	January - March 2022	January - March 2023
Warm weather	94%	88%
Peaceful/relaxing	91%	85%
A safe destination	87%	80%
Plenty to see and do	79%	78%
Convenient location	77%	73%
A "family" atmosphere	74%	72%
White sandy beaches	86%	72%
Value for your travel dollar	70%	71%
Clean, unspoiled environment	81%	69%
Memories of visiting/nostalgia	-	67%
Reasonably priced lodging	66%	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]	January - March 2022	January - March 2023
Relax & unwind	39%	33%
Visiting friends & relatives	19%	28%
Sporting event	8%	16%
Beach	51%	12%
Part-time resident ("Snowbird")	-	11%
Checking-in on my property post-hurricane	-	10%
Shopping	4%	9%
Work-related hurricane recovery	-	9%
Golf or tennis	3%	8%
Fishing	5%	7%
Special occasion	3%	7%
Volunteering	1%	7%
Business meetings/conferences	2%	4%
Photography	2%	4%
Water sports	5%	3%
Special event	2%	3%
Nature, environment, bird watching	8%	3%
Attractions	4%	3%
Culture	2%	1%
Biking, hiking	6%	1%
Diving, snorkeling	1%	1%
Museums, history	2%	1%
Guided tours	2%	1%
Other	5%	6%

[1]Multiple responses permitted.

PRE-VISIT

Transportation	January - March 2022	January - March 2023
Fly	73%	59%
Drive a personal vehicle	23%	28%
Drive a rental vehicle	2%	10%
Drive a RV	1%	1%
Travel by bus	0%	1%
Other	1%	2%

Airport Used	January - March 2022	January - March 2023
Southwest Florida International	82%	85%
Punta Gorda	8%	8%
Ft. Lauderdale International	3%	2%
Orlando International	2%	1%
Tampa International	2%	2%
Miami International	2%	1%
Other	1%	1%

TRAVEL PARTY PROFILE

Visitor Origin[1]	January - March 2022	January - March 2023
Florida	4.0%	6.6%
Southeast	15.9%	20.8%
Northeast	20.4%	19.4%
Midwest	47.4%	37.4%
West	4.8%	8.4%
Canada	3.7%	4.6%
United Kingdom	0.9%	0.5%
Germany	1.0%	0.6%
Other Europe	0.9%	0.5%
Other International	1.0%	1.2%

Visitor Origin[1]	January - March 2022	January - March 2023
Minneapolis-St. Paul	6%	6%
New York	4%	4%
Detroit	4%	4%
Boston	3%	4%
Atlanta	3%	4%
Chicago	3%	4%

[1]Based on data from the Visitor Tracking Study.

TRAVEL PARTY PROFILE

Travel Parties	January - March 2022	January - March 2023
Mean travel party size	3.0	2.9
Travel with children under age 18	27%	30%

Travel Party Composition	January - March 2022	January - March 2023
As a family	24%	35%
As a couple	36%	33%
By yourself	8%	15%
With other couples/friends	12%	10%
With business associates	1%	6%
In a tour group	1%	1%
Other	<1%	<1%

[1]Sources: Occupancy Study and Visitor Tracking Study

TRAVEL PARTY PROFILE

Marital Status	January - March 2022	January - March 2023
Married/Domestic Partnership	74%	73%
Single	26%	27%

Age	January - March 2022	January - March 2023
Average age	52	49
Median age	52	50

Household Income	January - March 2022	January - March 2023
Median Income	$112,500	$111,500

TRAVEL PARTY PROFILE

Race/Ethnicity	January - March 2022	January - March 2023
Caucasian/White	83%	77%
Hispanic/Latino/Latina/Latinx	8%	14%
African American/Black	3%	4%
Asian/Asian American/Pacific Islander	2%	2%
Middle Eastern/Northern African	-	1%
Another race/ethnicity	4%	2%

Gender	January - March 2022	January - March 2023
Female	45%	43%
Male	55%	57%

TRIP EXPERIENCE

Length of Stay[1]	January - March 2022	January - March 2023
Average nights in the Fort Myers area	7.6	8.3

First Time/Repeat Visitors	January - March 2022	January - March 2023
First-time	35%	25%
Repeat	65%	75%

[1]Sources: Occupancy Study & Visitor Tracking Survey.
Also, 2022 data was updated to match the updated calculation method.

TRIP EXPERIENCE

Type of Accommodations	January - March 2022	January - March 2023
Hotel/motel/resort	30%	37%
Vacation rental home	40%	20%
Friends/family home	10%	18%
Personal condo, house, timeshare, etc.	15%	17%
Bed & Breakfast/Inn	2%	4%
Campground/RV Park	1%	2%
Not spending the night	2%	1%
Other	<1%	1%

TRIP EXPERIENCE

Activities[1]	January - March 2022	January - March 2023
Restaurants	54%	65%
Relax and unwind	67%	62%
Visit friends/relatives	38%	43%
Shopping	37%	38%
Beach	72%	34%
Fishing	21%	20%
Attend or participate in a sporting event	5%	19%
Golf, tennis, or pickleball	12%	17%
Bars, nightclubs	18%	15%
Nature, environment, bird watching	28%	15%
Biking, hiking	27%	10%
Volunteering	1%	10%
Photography	12%	10%
Special events	8%	9%
Water sports	28%	8%
Attractions	14%	7%
Special occasion	4%	7%
Culture	7%	5%
Museums, history	9%	5%
Business meetings/conferences	2%	4%
Diving, snorkeling	5%	4%
Guided tours	7%	4%
Spas	4%	3%
Other	3%	6%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Attractions[1]	January - March 2022	January - March 2023
Beaches	72%	34%
Bell Tower Shops	13%	27%
Gulf Coast Town Center	12%	22%
Edison & Ford Winter Estates	21%	21%
Miromar Outlets Mall	12%	21%
Coconut Point Mall	14%	18%
Shell Factory and Nature Park	15%	12%
Manatee Park	6%	6%
Bailey-Matthews Shell Museum[2]	9%	6%
Sanibel Outlets	17%	3%
Barbara B. Mann Performing Arts Hall	2%	2%
Broadway Palm Dinner Theater	3%	2%
Sanibel Lighthouse[3]	29%	1%
Periwinkle Place[5]	12%	0%
Fort Myers Beach Pier[5]	41%	0%
J.N. Ding Darling National Wildlife Refuge[4]	17%	0%
Other	4%	6%
None	5%	18%

[1]Multiple responses permitted.
[2]Reopened in February 2023.
[3]Reopened for 1 day in February for the relighting ceremony.
[4]Reopened in April 2023.
[5]Closed until further notice due to Hurricane Ian.

TRIP EXPERIENCE

Area stayed	January - March 2022	January - March 2023
Fort Myers	13%	46%
Cape Coral	16%	17%
Fort Myers Beach	29%	9%
Bonita Springs	5%	8%
Estero	3%	8%
North Fort Myers	2%	3%
Sanibel Island	22%	2%
Lehigh Acres	1%	2%
Along I-75	1%	2%
Captiva Island	4%	1%
Boca Grande/Outer Islands	1%	1%
Pine Island	1%	<1%
None/not staying overnight	2%	1%

POST-TRIP EVALUATION

Likelihood of Recommending the Area	January - March 2022	January - March 2023
Very Likely	95%	44%
Likely		44%
Unsure/Unlikely	5%	12%

Likelihood of Returning to the Area	January - March 2022	January - March 2023
Very Likely	91%	49%
Likely		37%
Unsure/Unlikely	9%	14%

Likelihood of Returning to the Area Next Year	January - March 2022	January - March 2023
Very Likely	58%	44%
Likely		33%
Unsure/Unlikely	42%	23%

POST-TRIP EVALUATION

Satisfaction with Accommodations	January - March 2022	January - March 2023
Exceeded expectations	34%	31%
Met expectations	61%	59%
Did not meet expectations	5%	10%

Felt Welcomed in the Fort Myers Area	January - March 2022	January - March 2023
Yes	94%	91%

POST-TRIP EVALUATION

Satisfaction with Visit	January - March 2022	January - March 2023
Very satisfied	58%	49%
Satisfied	38%	41%
Neither	2%	7%
Dissatisfied	1%	1%
Very dissatisfied	0%	0%
Don't know/no opinion	1%	2%

Satisfaction with Customer Service	January - March 2022	January - March 2023
Very satisfied	55%	45%
Satisfied	37%	43%
Somewhat satisfied	5%	8%
Dissatisfied	1%	1%
Very dissatisfied	0%	0%
Don't know/no opinion	2%	2%

POST-TRIP EVALUATION

Visitor Concerns[1]	January - March 2022	January - March 2023
Traffic	47%	39%
High Prices	19%	20%
Damaged buildings, signs, and landscapes	-	17%
Red tide	16%	16%
Insects	13%	8%
Water quality	10%	7%
Lack of nightlife	8%	6%
Quality of accommodations	6%	3%
Beach seaweed	11%	3%
Weather	8%	3%
Other	4%	<1%
Construction noise/activity[2]	-	<1%
Nothing	21%	29%

[1]Multiple responses permitted.
[2]Added as an option near end of March 2023.

Methodology

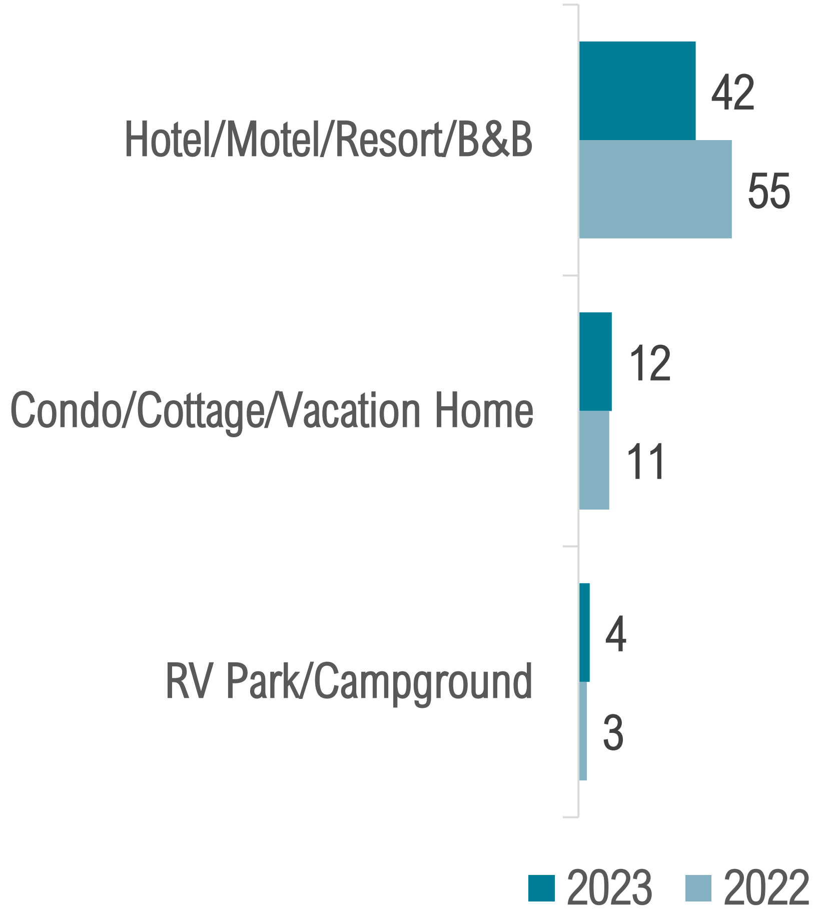
METHODOLOGY

- Economic Impact of tourism in Lee County is derived from:
  - Visitor Tracking Study
    - In-person interviews in public areas, hotels, & at events around Lee County
    - Sample size: 903 completed interviews
    - Target individuals: January - March visitors to Lee County
    - Data Collection: January - March 2023
  - Occupancy Study
    - Email and telephone survey of hotels, rental management companies, RV/campgrounds, etc., as well as data from STR and KeyData reports
    - Sample Size – data from 5,754 hotel/rental/campground units (58 properties) reporting to DSG, 8,466 hotel units reporting to STR (70 properties), and 2,789 rental units (27 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.
  - Various government agencies and data sources including Florida Department of Business and Professional Regulation
  - TDT collections provided by the Lee County VCB
  - Tourism database at Downs & St. Germain Research

METHODOLOGY

- Occupancy Study
  - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc.
    - Sample Size – 58 completed interviews
    - Data Collection: Completed in April
      - (for January - March 2023)
  - Total Sample Size – data from 5,754 hotel/rental/campground units reporting to DSG, 8,466 hotel units reporting to STR (representing 70 properties), and 2,789 rental units reporting to KeyData (representing 27 properties)

Number of Interviews



Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

January - March 2023

Visitor Tracking, Occupancy, & Economic Impact Study

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fort MYERS
ISLANDS, BEACHES & NEIGHBORHOODS

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