Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

April - June 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

April - June 2023

- Due to Hurricane Ian, tourism metrics for the Fort Myers area are still down across the board as the recovery process remains ongoing.
- **Occupancy** and **average daily rate** both **decreased significantly**, causing **revenue per available room** to **decrease 44.7%** compared to Apr-Jun 2022
- **Visitation** was **down 50.8%** and **room nights** were **down 39.7%**
  - The drop in room nights was not as steep as the drop in visitation due to an increased length of stay and smaller travel party size compared to Apr-Jun 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 **proportion of visitors who travelled** to the Fort Myers area **alone** or **with business associates** also **remained elevated**
- The **proportion of international visitors** saw a **significant increase** compared to Apr-Jun 2022. However, this **still represents** a **14% decrease** in the actual **number of international visitors.**

52.6%	$137.11	$72.18
OCCUPANCY RATE	**AVERAGE DAILY RATE**	**REVENUE PER ROOM**
↓ 23.0% from 2022	↓ 28.1% from 2022	↓ 44.7% from 2022

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VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

TOURISM SNAPSHOT: KEY METRICS April – June 2022 VS. 2023

Visitor & Lodging Statistics	Apr - Jun 2022	Apr - Jun 2023	% Change '22-'23
Visitors	1,477,100	727,200	- 50.8%
Visitor Days	8,271,760	4,450,500	- 46.2%
Room Nights	1,748,800	1,054,900	- 39.7%
Direct Expenditures[1]	$1,206,349,700	$683,376,000	- 43.4%
Total Economic Impact[2]	$1,921,715,100	$1,094,085,000	- 43.1%

[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.

TOURISM SNAPSHOT: KEY METRICS YEAR TO DATE

Visitor & Lodging Statistics	CYTD 2022	CYTD 2023	% Change '22-'23
Visitors	2,603,600	1,463,500	-43.8%
Visitor Days	16,833,160	10,561,800	-37.3%
Room Nights	3,734,700	2,433,500	-34.8%
Direct Expenditures[1]	$2,617,113,300	$1,651,213,700	-36.9%
Total Economic Impact[2]	$4,169,061,500	$2,643,593,200	-36.6%

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

April - June LODGING STATISTICS

52.6%	$137.11	$72.18
Occupancy	ADR	RevPAR
↓ 23.0% From 2022	↓ 28.1% From 2022	↓ 44.7% From 2022

VISITOR JOURNEY: PRE-VISIT

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

TRIP PLANNING

- Nearly 1 in 3 visitors planned their trips to the Fort Myers area 1-2 months in advance

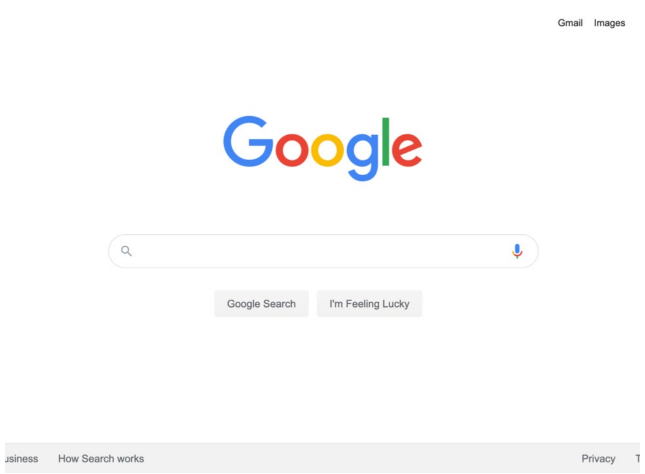
- 3 in 10 visitors requested information to plan their trips
    - Nearly 1 in 4 visitors called the VCB
    - 8% called a hotel, motel, or condo to help with planning

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

TRIP PLANNING: WEBSITES/APPS USED

- Nearly 4 in 5 visitors used websites and apps to plan their trips to the Fort Myers area
- Top websites and apps used to plan their trips include[1]:

30% Airline Websites/Apps



29% Search Engines

airbnb

22% 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

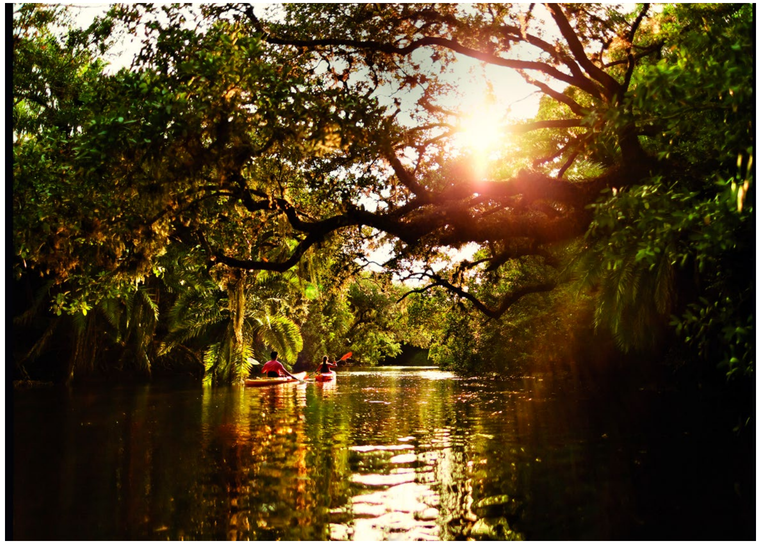
85% Peaceful/relaxing

82% 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]:



39% Relax & Unwind

33% Beach

30% Visiting Friends & Relatives

[1]Three responses permitted.

PROMOTIONS

- Over 2 in 5 visitors recalled promotions in the past 6 months for the Fort Myers area
- 21% of all visitors were influenced to come to the Fort Myers area by these promotions
- Top sources of recall include[1]:

48% Internet

33% Social media

17% Traveler reviews, blogs

16% Television

[1]Multiple responses permitted.

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BOOKING

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

43% Directly with hotel/condo

17% VRBO, HomeAway

15% Online travel agency

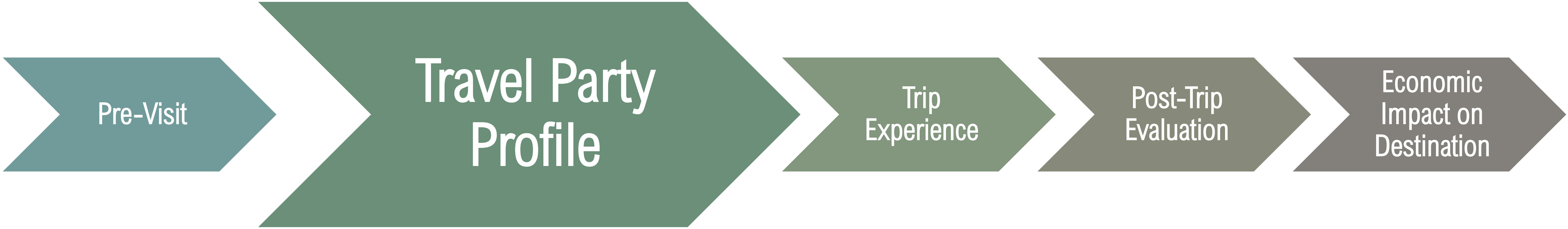
13% Airbnb

9% Vacation rental company

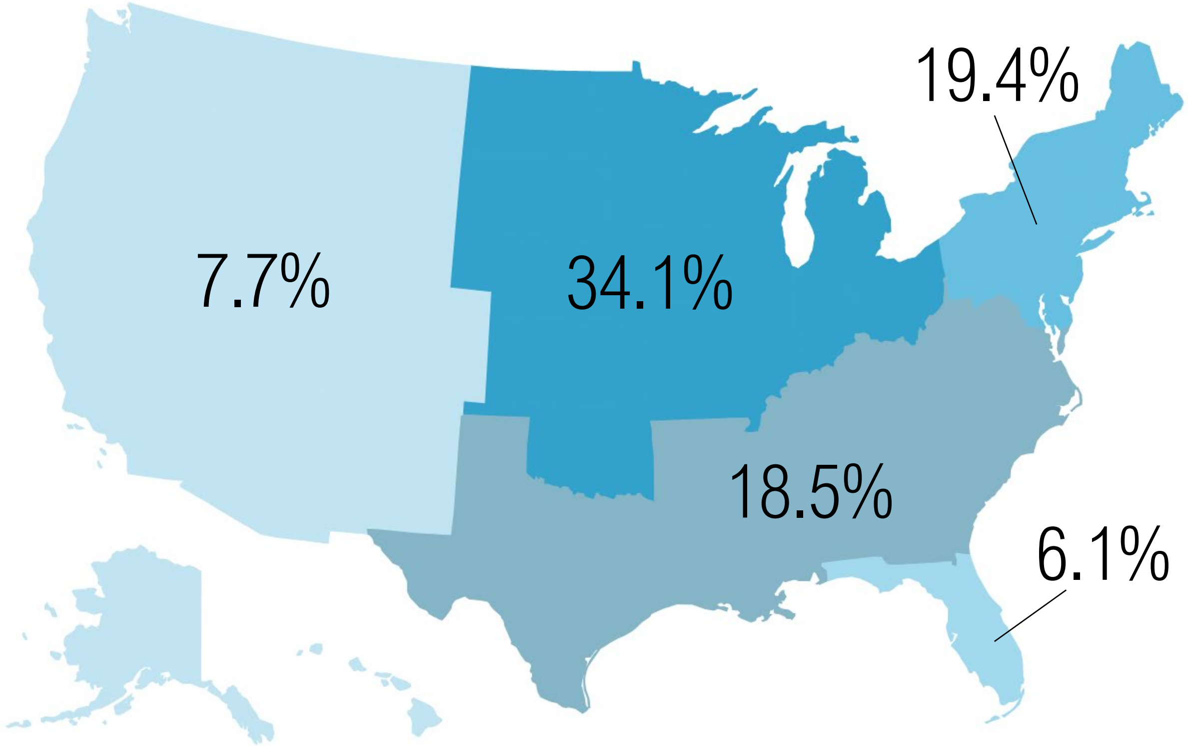
TRANSPORTATION

- 67% of visitors flew to the Fort Myers area
- 57% of all visitors traveled to the Fort Myers area via RSW

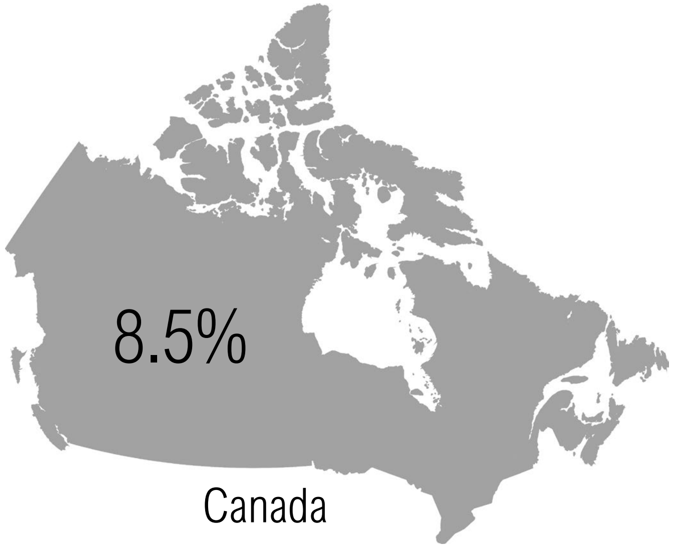
VISITOR JOURNEY: TRAVEL PARTY PROFILE



ORIGIN REGION[1]



US = 85.8%



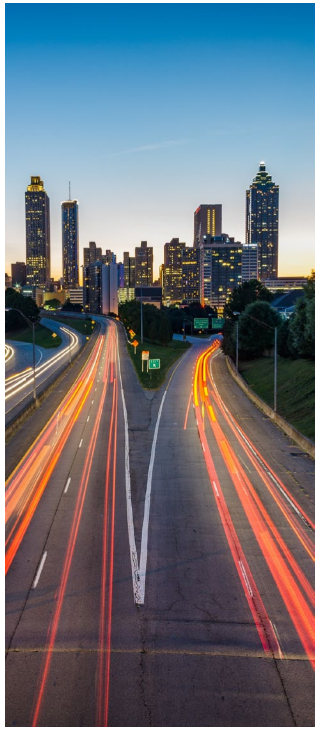
5.7% Other International Markets

(Germany, UK, etc.)

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

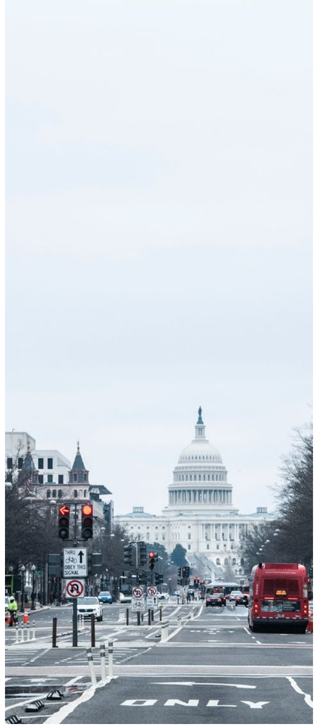
TOP ORIGIN MARKETS[1]

5% New York

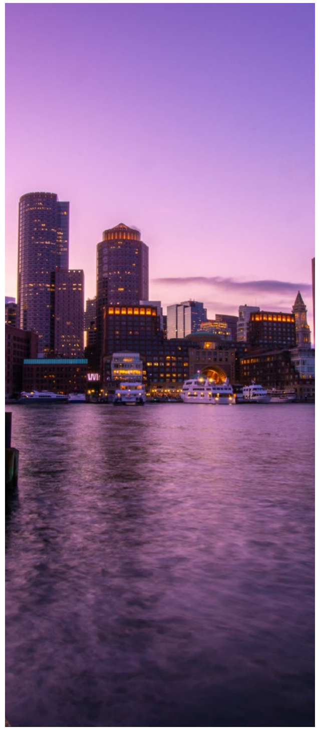


4% Atlanta

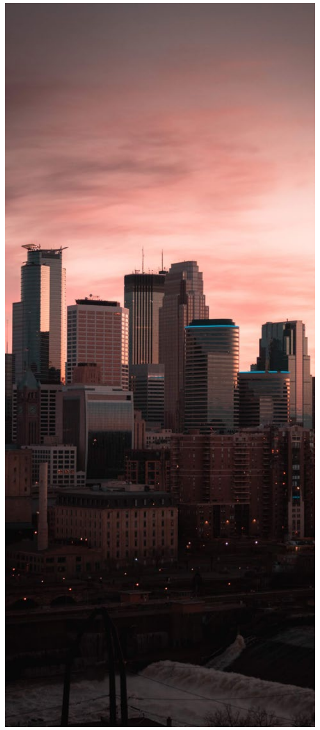
4% Chicago



3% Washington, D.C.



3% Boston



3% Minneapolis

3% Detroit

[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 2.8 people[1]
- 35% traveled with children
- 2 in 5 visitors traveled as a family, while 1 in 3 traveled as a couple, and roughly another 1 in 10 visitors traveled alone or with other couples/friends

[1]Sources: Occupancy Study and Visitor Tracking Study

DEMOGRAPHIC PROFILE[1]

April - June Visitors:

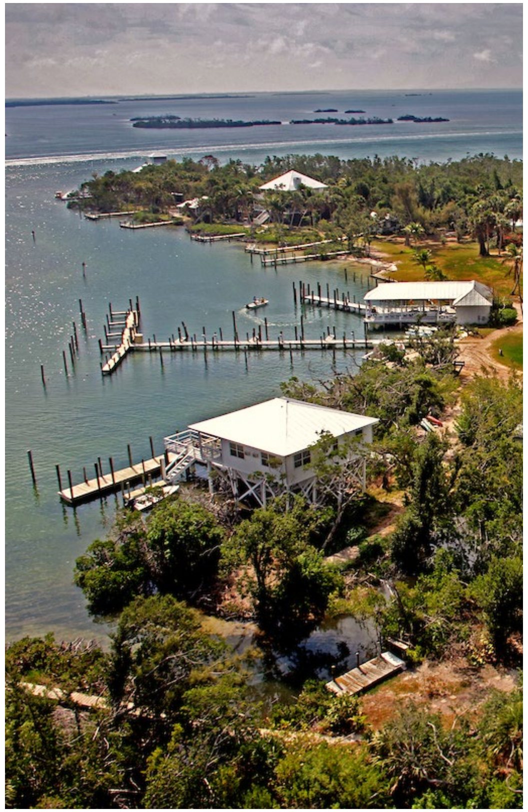
- Median age of 50 years old
- Median household income of $107,600
- Married (74%)
- College educated (69%)
- Caucasian/white (79%)
- Female (52%)

[1]Of people interviewed.

Visitor Journey: Trip Experience

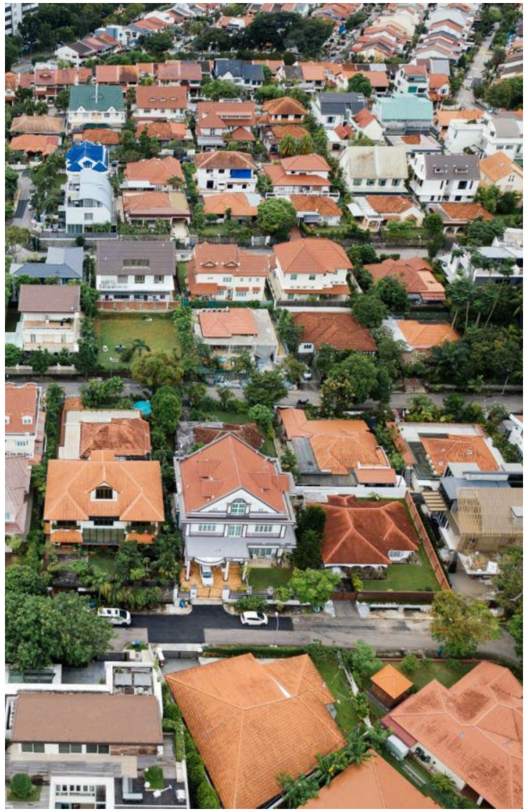
TOP ACCOMMODATIONS

34% Hotel/Motel/Resort



29% Condo/Vacation Rental

15% Personal second home, etc.



15% Staying with friends/relatives

LENGTH OF STAY & NUMBER OF TIMES IN DESTINATION

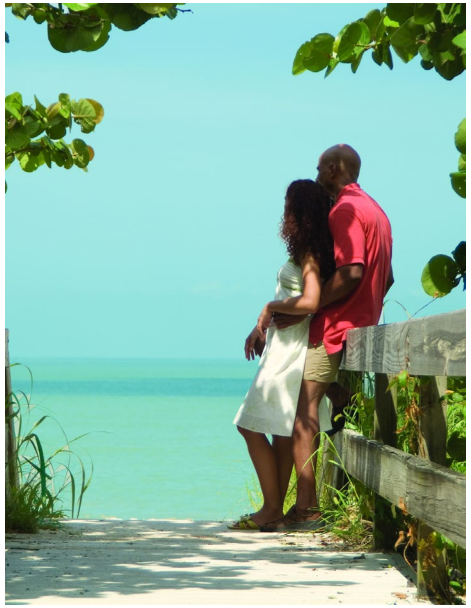
- Visitors[1] spent an average of **6.1 nights** in the Fort Myers area
- **30%** were **first time** visitors
- **21%** have visited **more than 10 times**

[1]Sources: Occupancy Study and Visitor Tracking Study

VISITOR ACTIVITIES

- Top visitor activities include[1]:

65% Dining out



58% Relaxing & unwinding

54% Beach

43% Visit friends/relatives

41% Shopping

[1]Multiple responses permitted.

TOP ATTRACTIONS VISITED[1]

54% Beaches

21% Bell Tower Shops

19% Gulf Coast Town Center

19% Edison & Ford Winter Estates

[1]Multiple responses permitted.

TOP COMMUNITIES STAYED

36% Fort Myers

24% Cape Coral

9% Bonita Springs

VISITOR JOURNEY: POST-TRIP EVALUATION

SATISFACTION

- **90%** of visitors are **likely to recommend** the area
  - 49% are very likely to recommend
- **87%** of visitors are **likely to return**
  - 54% are very likely to return
- **76%** of visitors are **likely to return next year**
  - 47% are very likely to return next year

SATISFACTION

- 94% of visitors were satisfied or very satisfied with their overall visit to the Fort Myers area (56% were very satisfied)
- 93% of visitors were satisfied or very satisfied with customer service on their visit (55% were very satisfied)
- 93% of visitors said paid accommodations at least met their expectations (39% said they exceeded expectations)

TOP ATTRIBUTE RATINGS

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

96% Warm weather

93% Peaceful/relaxing

91% 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 1 in 3 visitors were concerned about traffic in the Fort Myers area
- Over 1 in 4 visitors mentioned damaged buildings, signs, and landscapes
- Over 1 in 4 visitors had no concerns at all about the destination

AREA DESCRIPTIONS

Warm Weather

"Wonderful vacation with great tropic environment, beautiful beaches, palm trees, and great weather, fishing, and restaurants!"

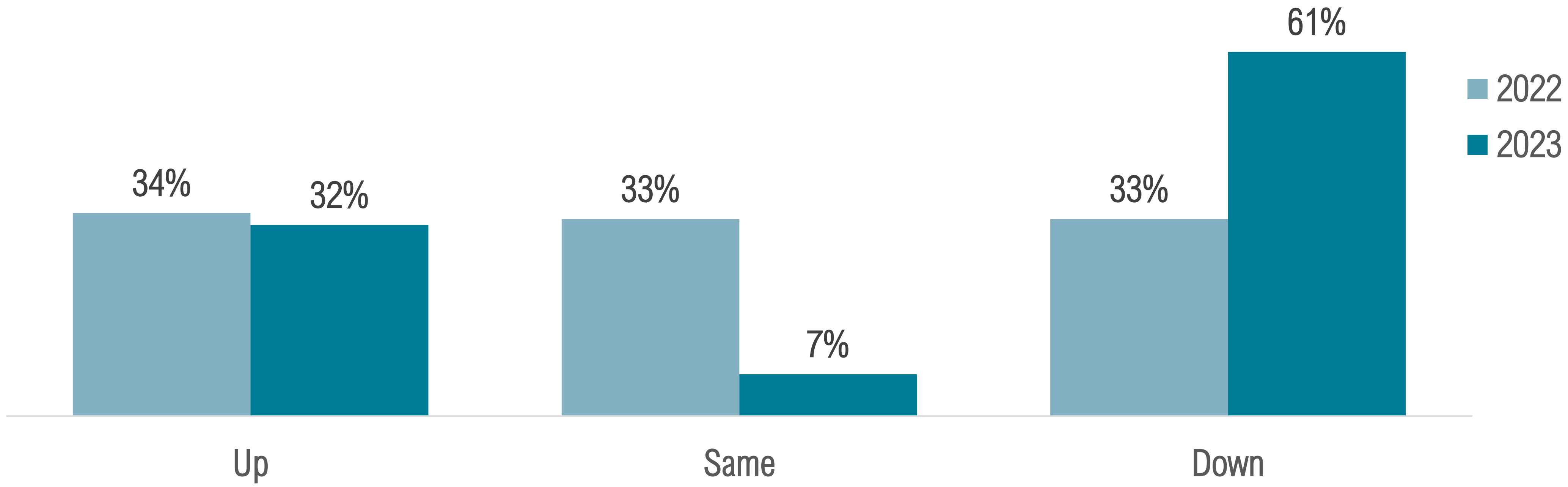
Peaceful/Relaxing

"Tremendous vacation with near perfect weather, warm days, cool nights, as well as a relaxing and peaceful vibe."

Safe Destination

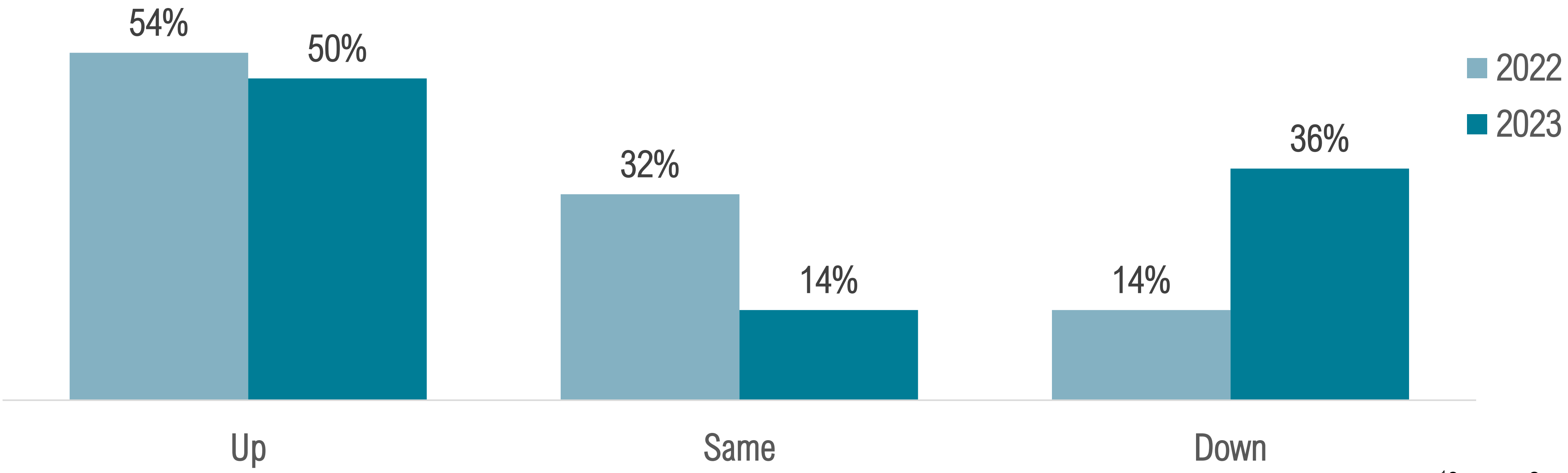
"It's just so beautiful and safe, and the people are so friendly and welcoming."

OCCUPANCY BAROMETER[1]: JUL - SEP RESERVATIONS



[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?"

OCCUPANCY BAROMETER[1]: OCT - DEC RESERVATIONS



[1]Sources: Occupancy Survey

Accommodations partners were asked the following, "Please think about your reservations for the next three months. Compared to October - December 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

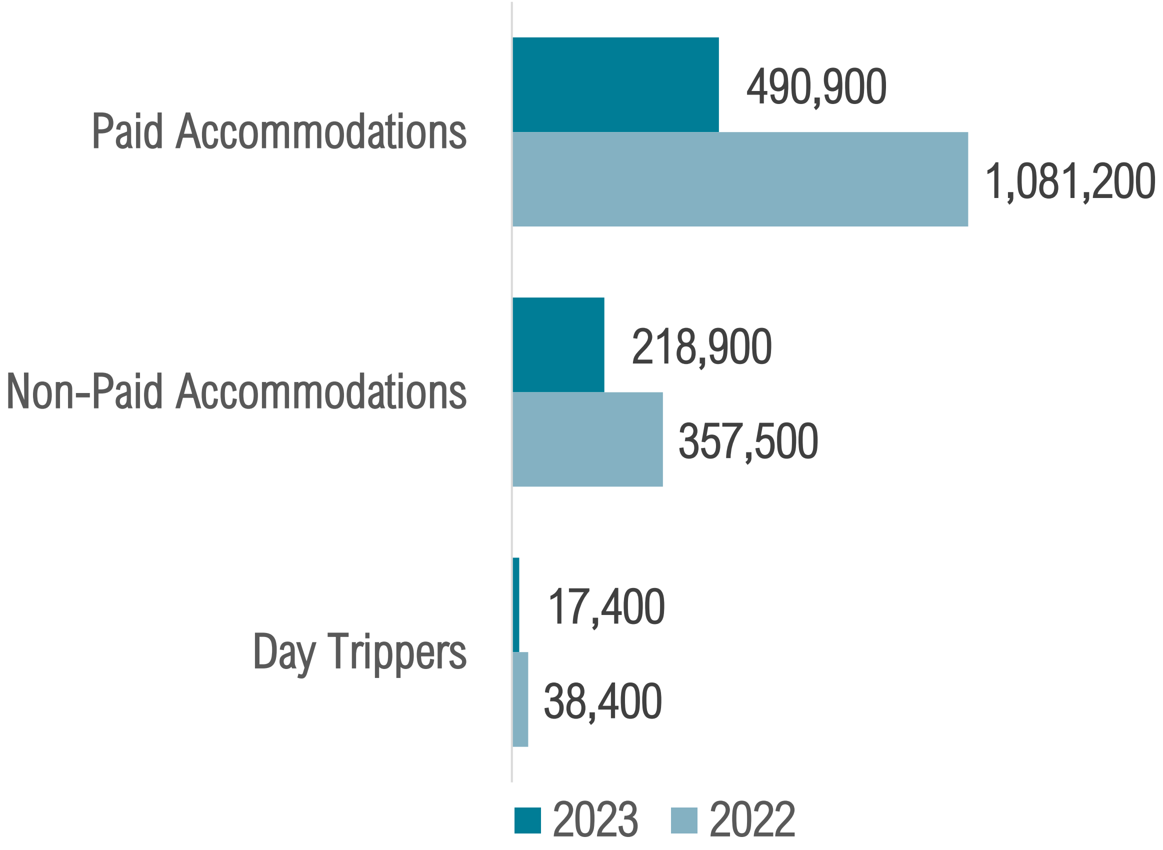
Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

NUMBER OF VISITORS

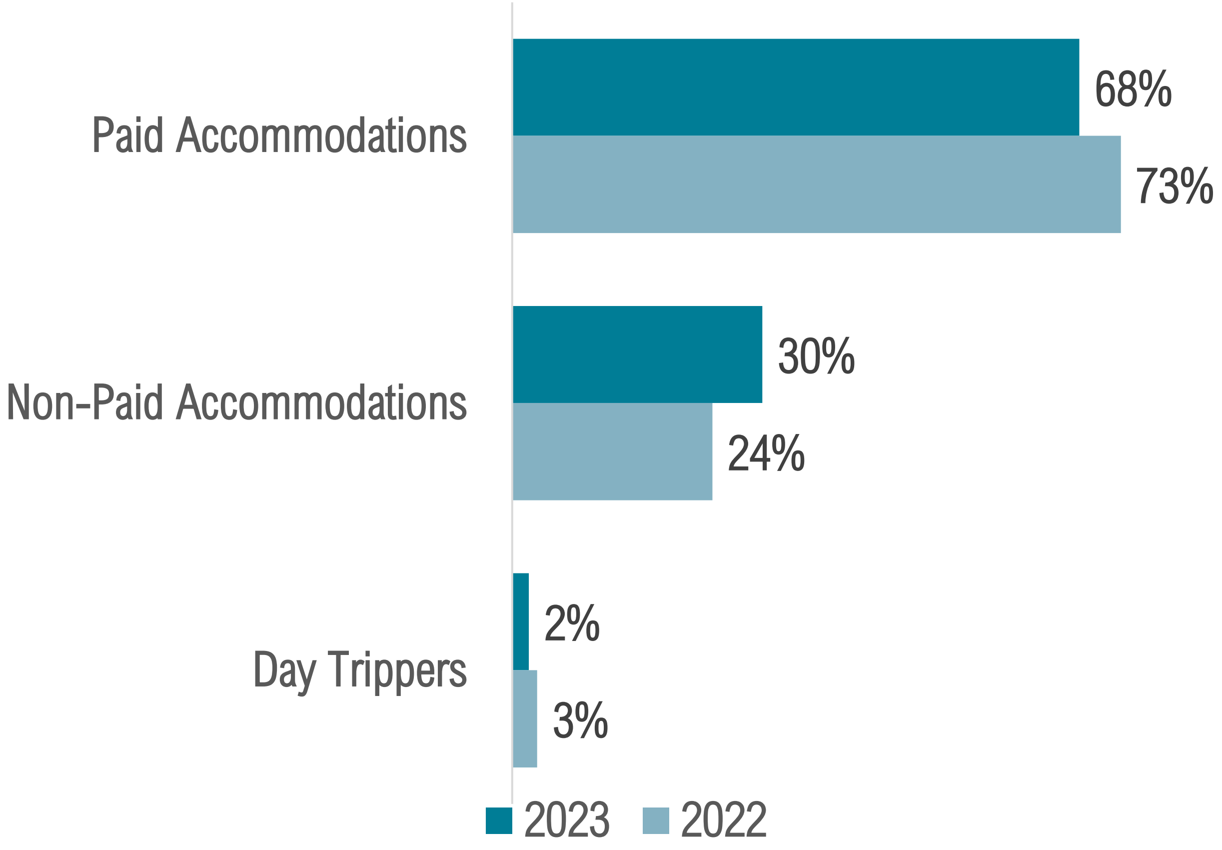
There were 727,200[1] visitors to the Fort Myers area in April - June 2023 (-50.8% from 2022).



[1]Sources: Visitor Tracking Study & Occupancy Survey

VISITOR TYPE

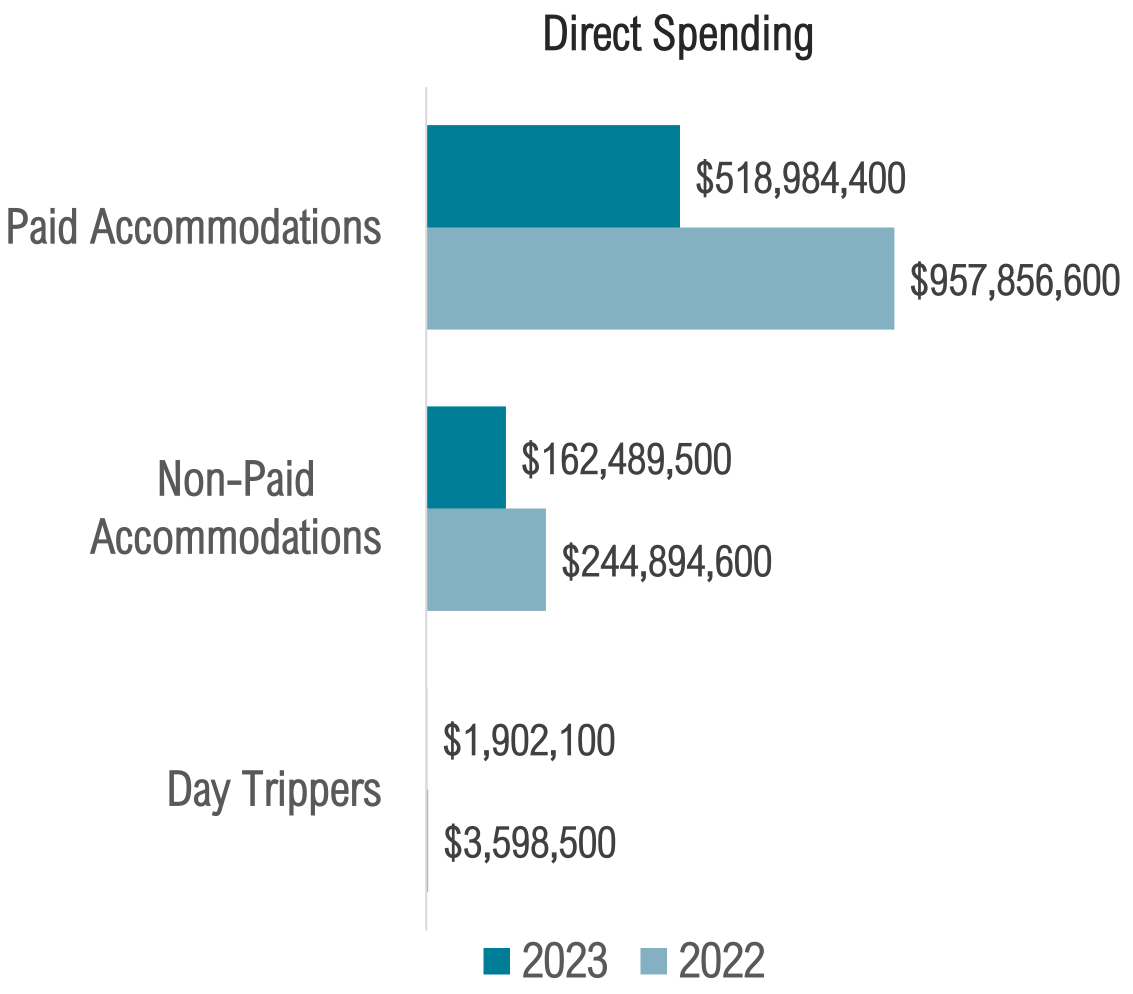
Visitors staying in paid accommodations accounted for over 2 in 3 visitors.



VISITOR EXPENDITURES BY VISITOR TYPE

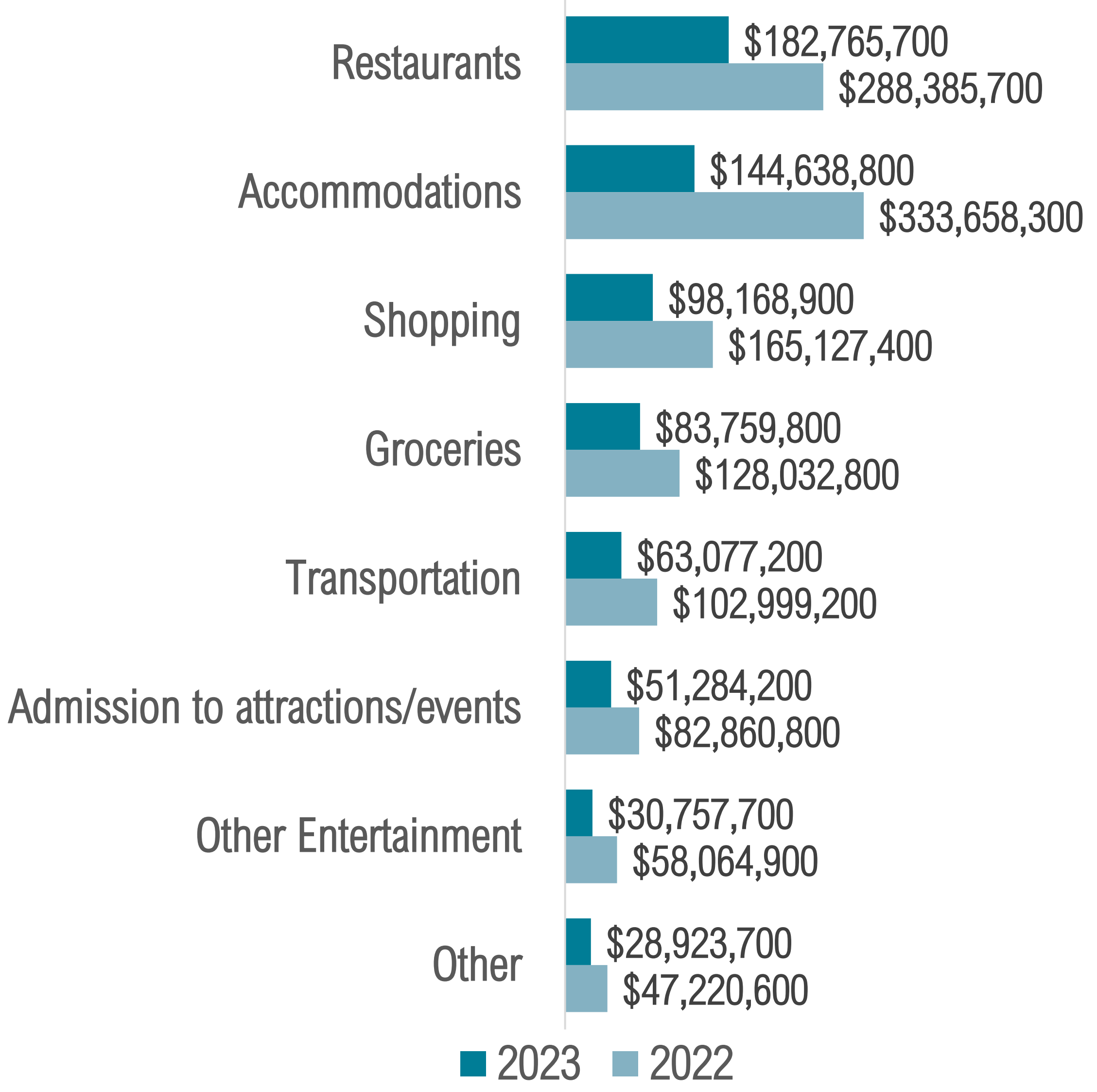
April - June visitors spent $683,376,000 in the Fort Myers area, resulting in a total economic impact of $1,094,085,000, down 43.1% from 2022.

Visitors staying in paid accommodations accounted for 68% of all visitors and 76% of all spending.



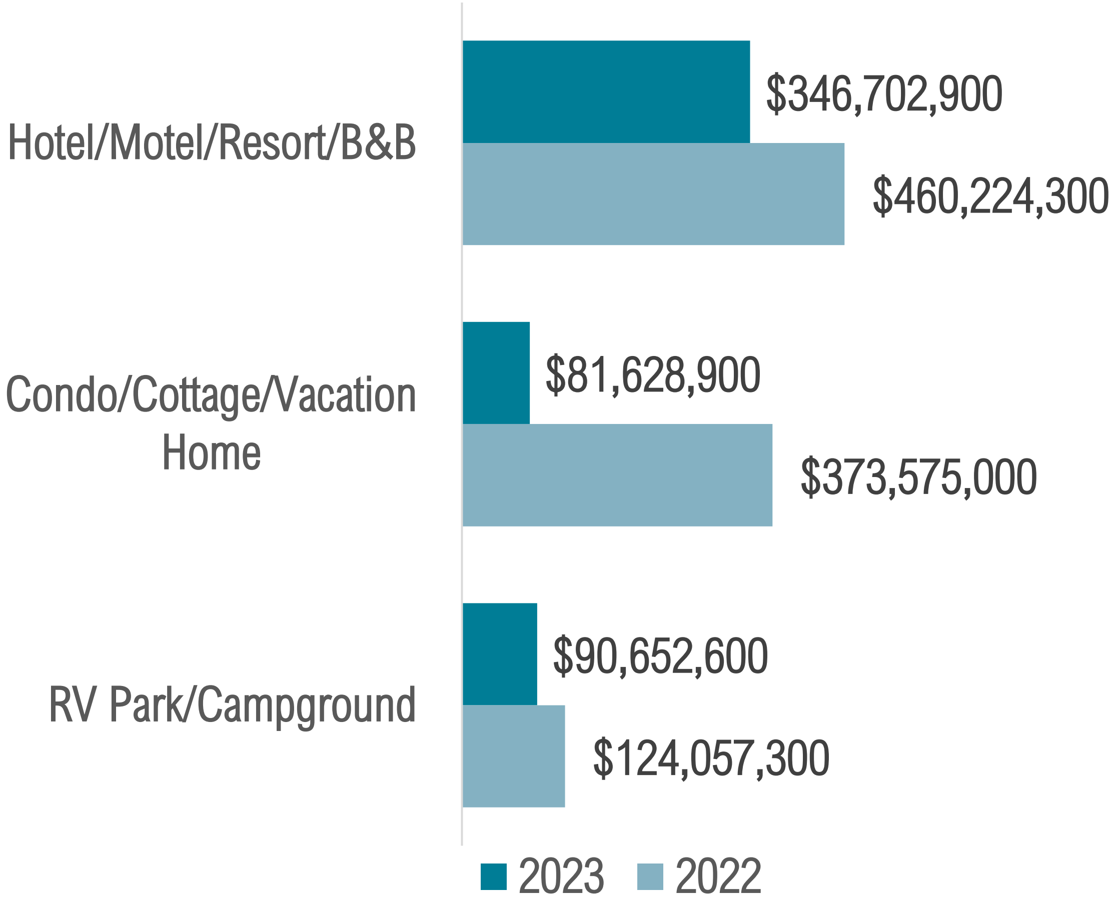
VISITOR EXPENDITURES BY SPENDING CATEGORY

Of the $683,376,000 visitors spent in the Fort Myers area, 27% was spent on restaurants and 21% was spent on accommodations, accounting for nearly half of all visitor spending.



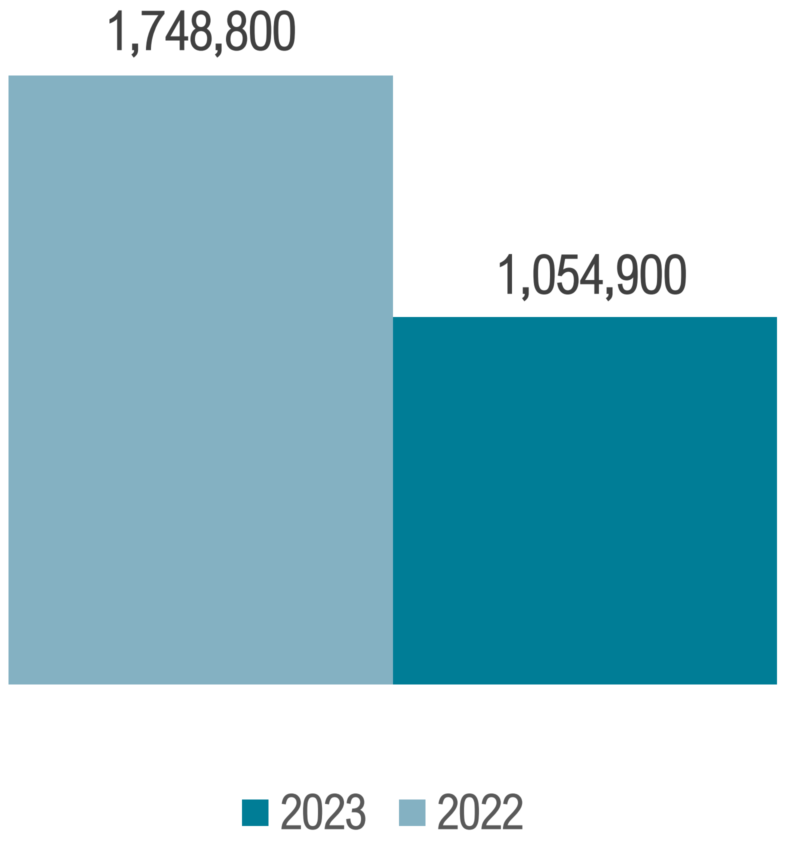
VISITOR EXPENDITURES BY LODGING TYPE

April - June visitors staying in paid accommodations spent **$518,984,400** in the Fort Myers area.



ROOM NIGHTS GENERATED

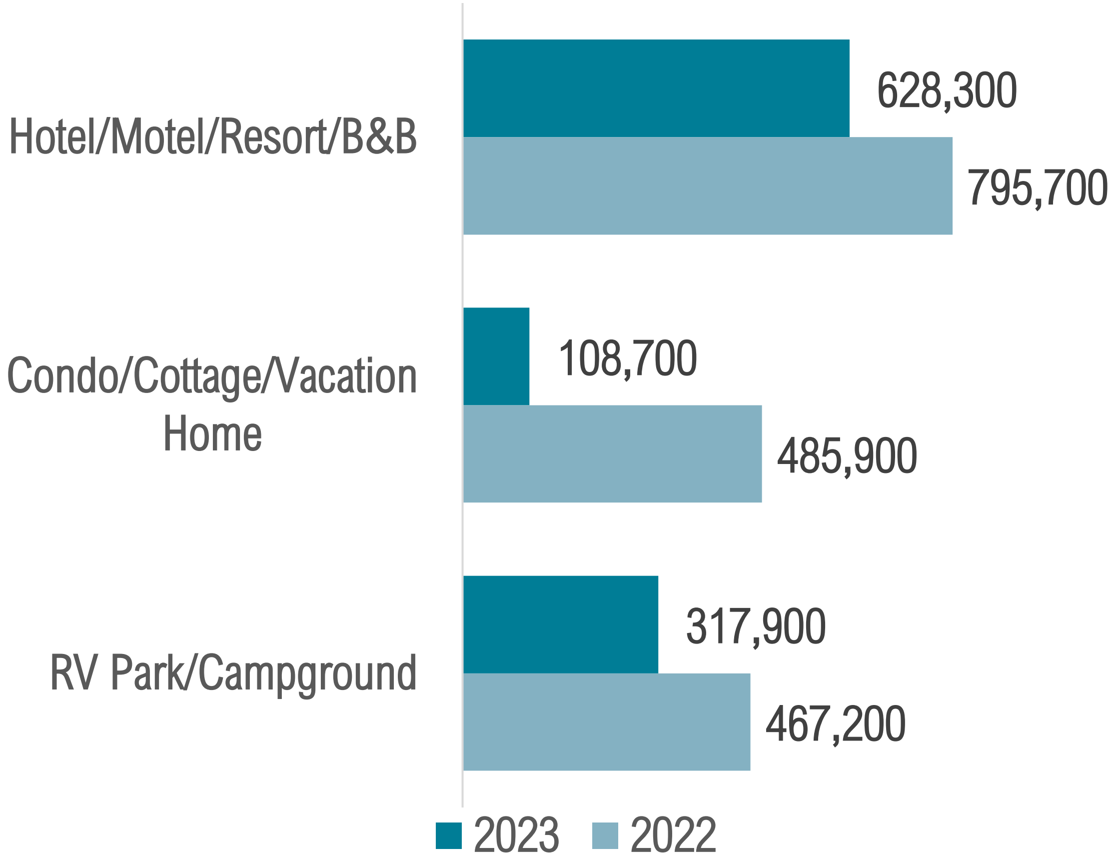
April - June visitors spent 1,054,900[1] nights in Fort Myers area hotels, resorts, condos, rental houses, RV parks, etc. (-39.7% from 2022).



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

ROOM NIGHTS GENERATED

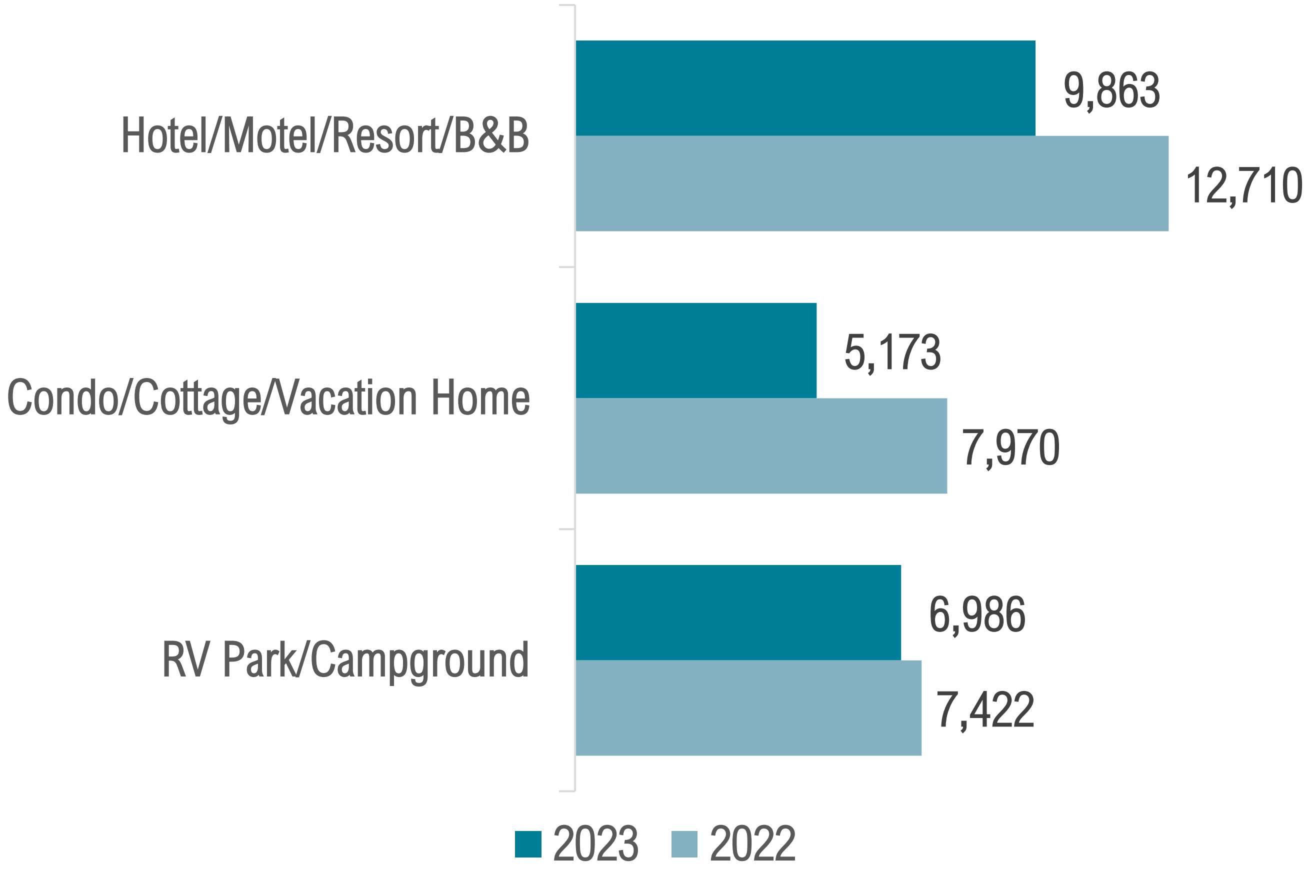
Hotels, motels, etc. accounted for 3 in 5 room nights spent in the Fort Myers area, while vacation rentals accounted for just 1 in 10 nights visitors spent in the area.



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

AVAILABLE UNITS

There were 22,021[1] available units in April - June 2023 vs. 28,102 in 2022 (-21.6%). Over 2 in 5 of the units available were from hotels, motels, etc.



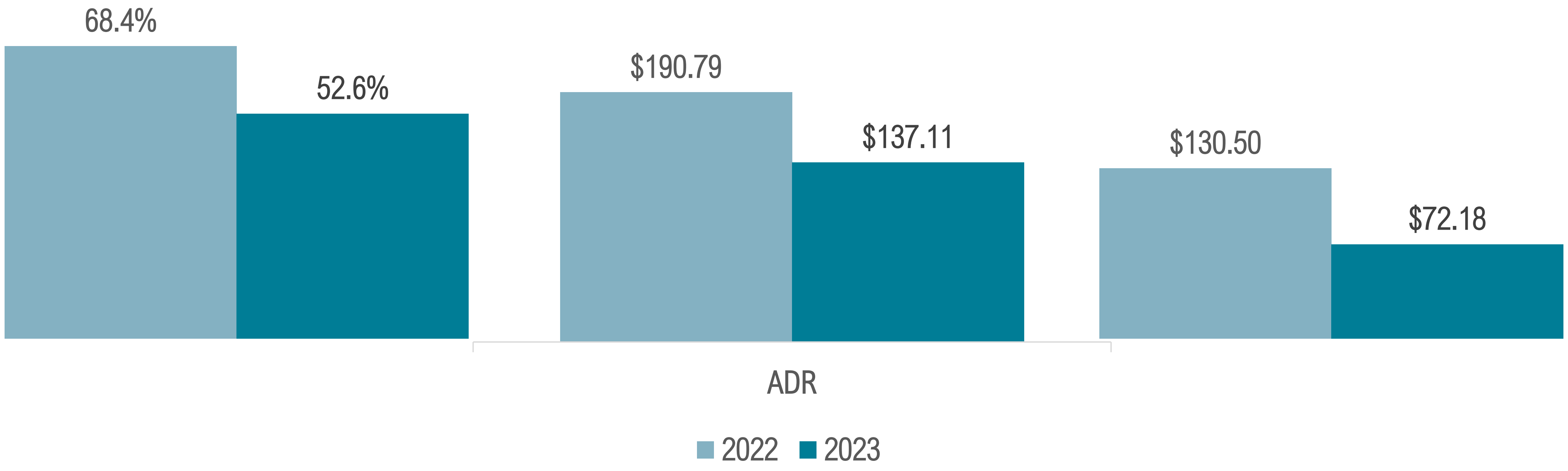
[1]Source: Occupancy Study, STR, and KeyData

OCCUPANCY, ADR AND REVPAR

Occupancy (-23.0%)[1]

ADR (-28.1%)[1]

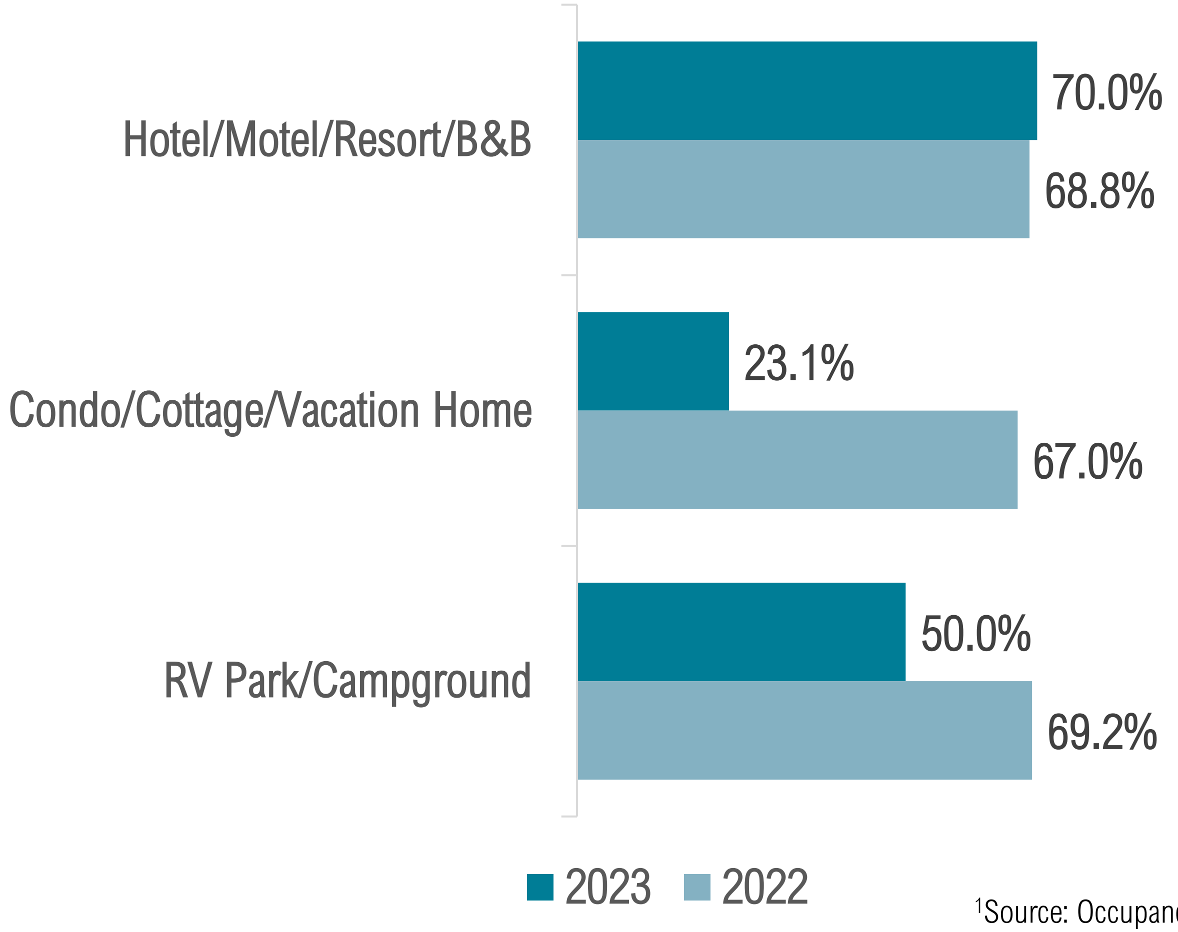
RevPAR (-44.7%)[1]



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

OCCUPANCY

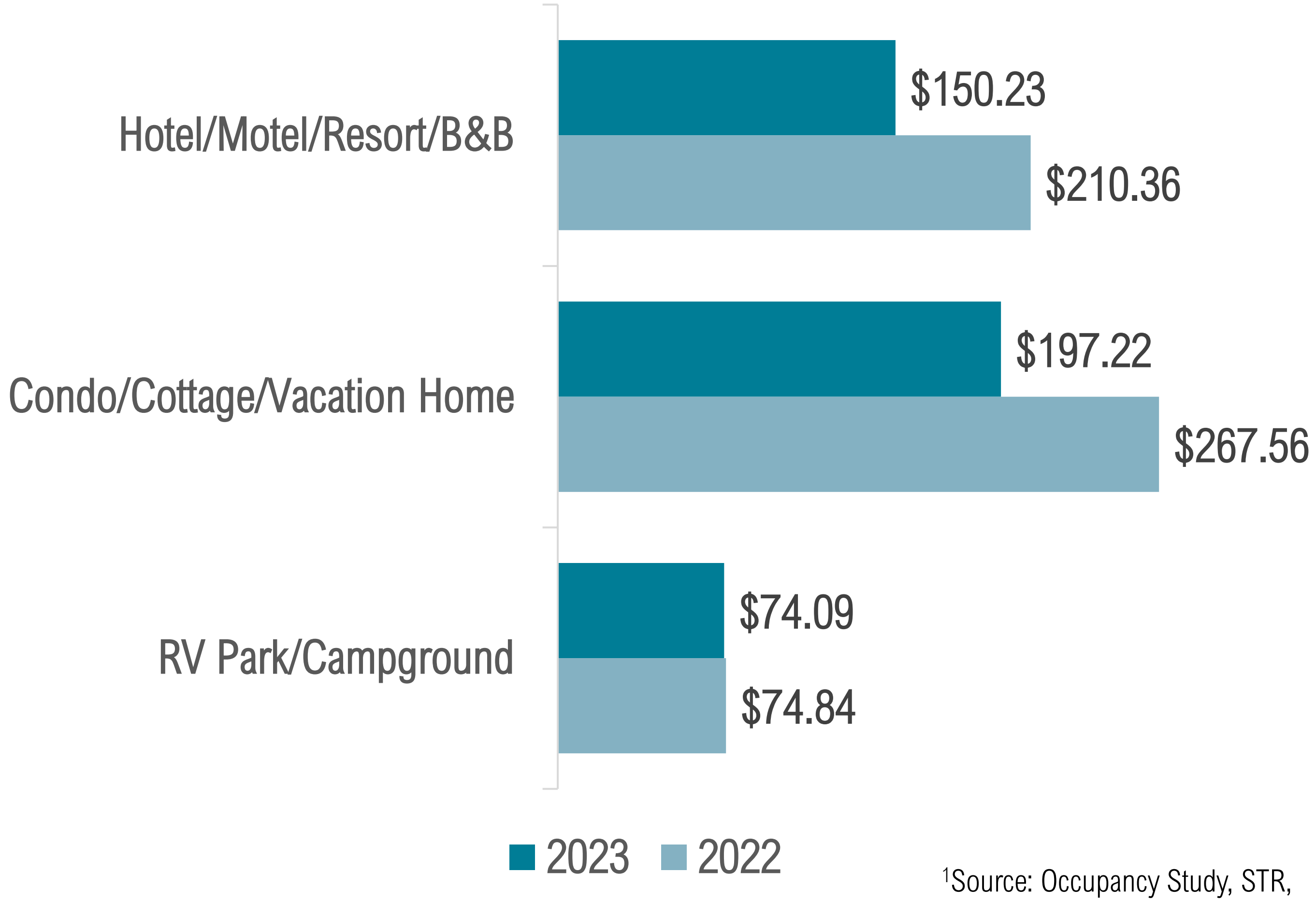
Average occupancy in April - June was 52.6%[1] (68.4% in 2022).



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

ADR

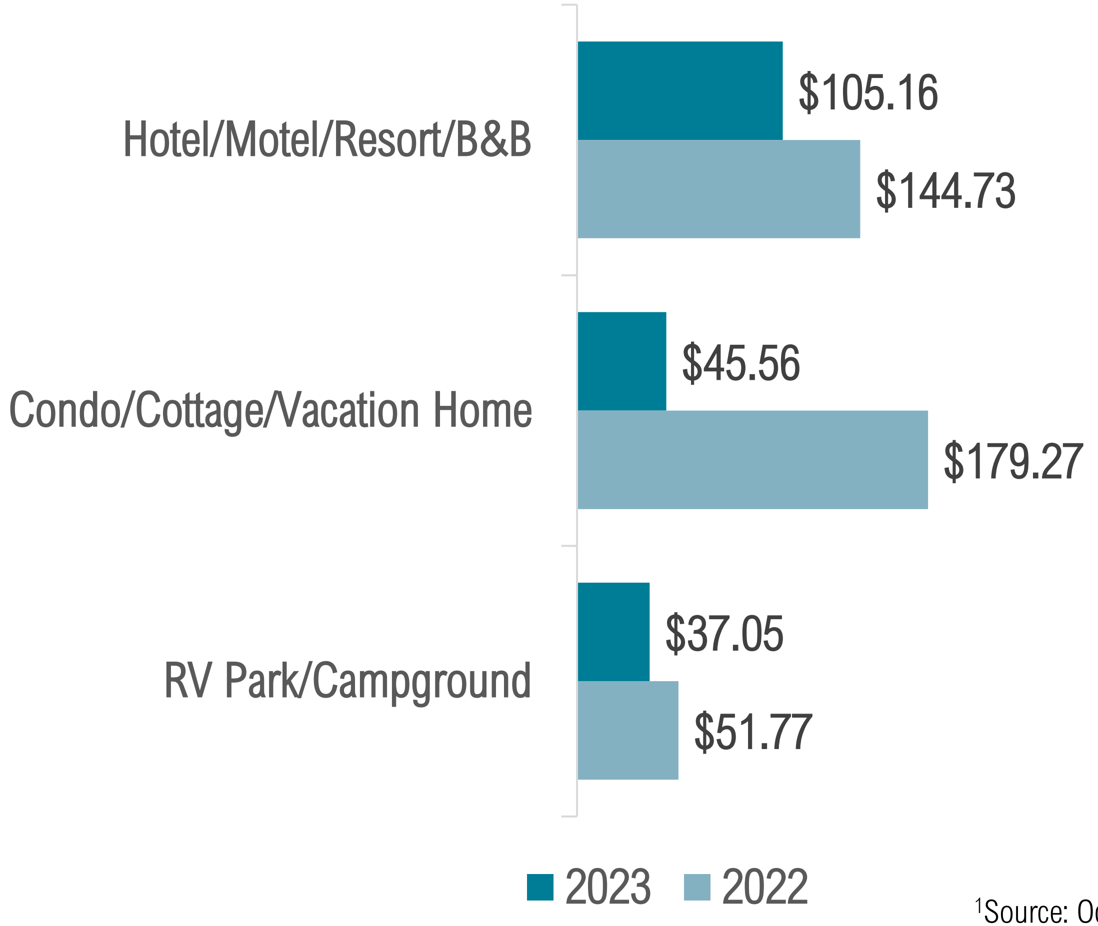
ADR in April - June was **$137.11**[1] ($190.79 in 2022).



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

REVPAR

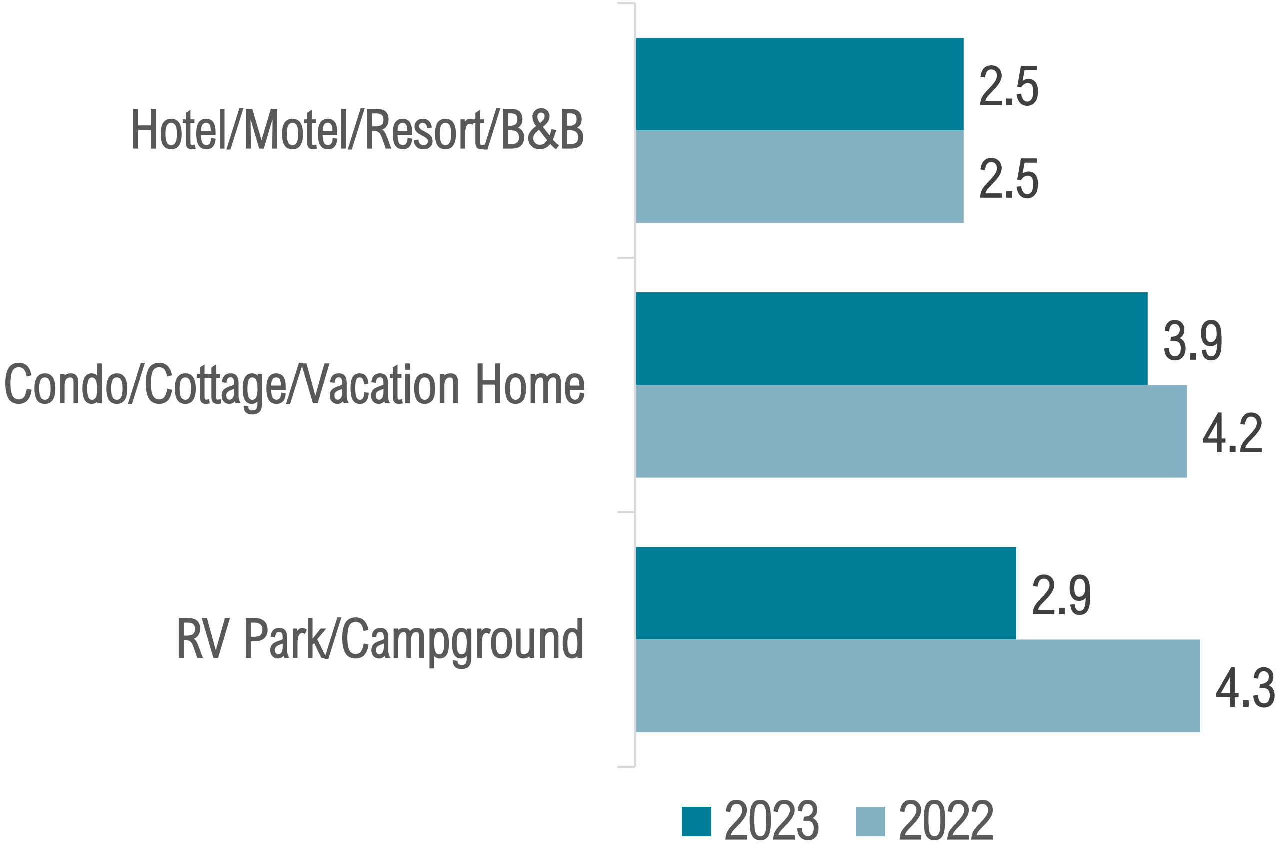
Average RevPAR in April - June was $72.18[1] ($130.50 in 2022).



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

TRAVEL PARTY SIZE

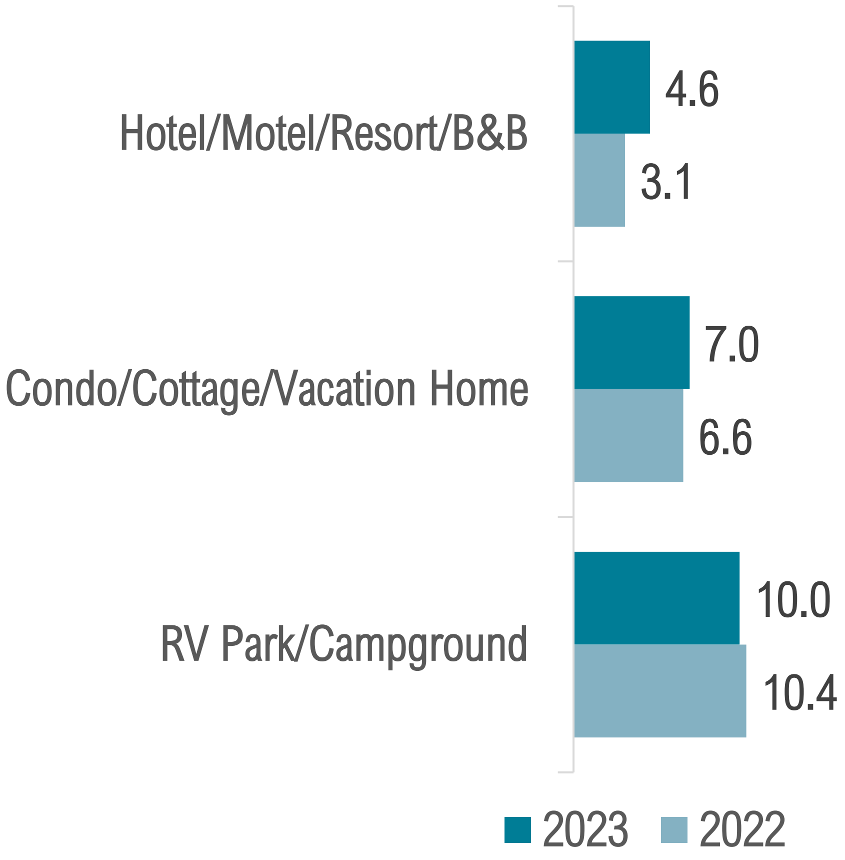
For visitors in paid accommodations, average travel party size in April - June was 2.7 people[1] (3.3 people in 2022).



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

LENGTH OF STAY

For visitors in paid accommodations, average length of stay in April - June was **5.9 nights**[1] (5.3 nights in 2022).



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

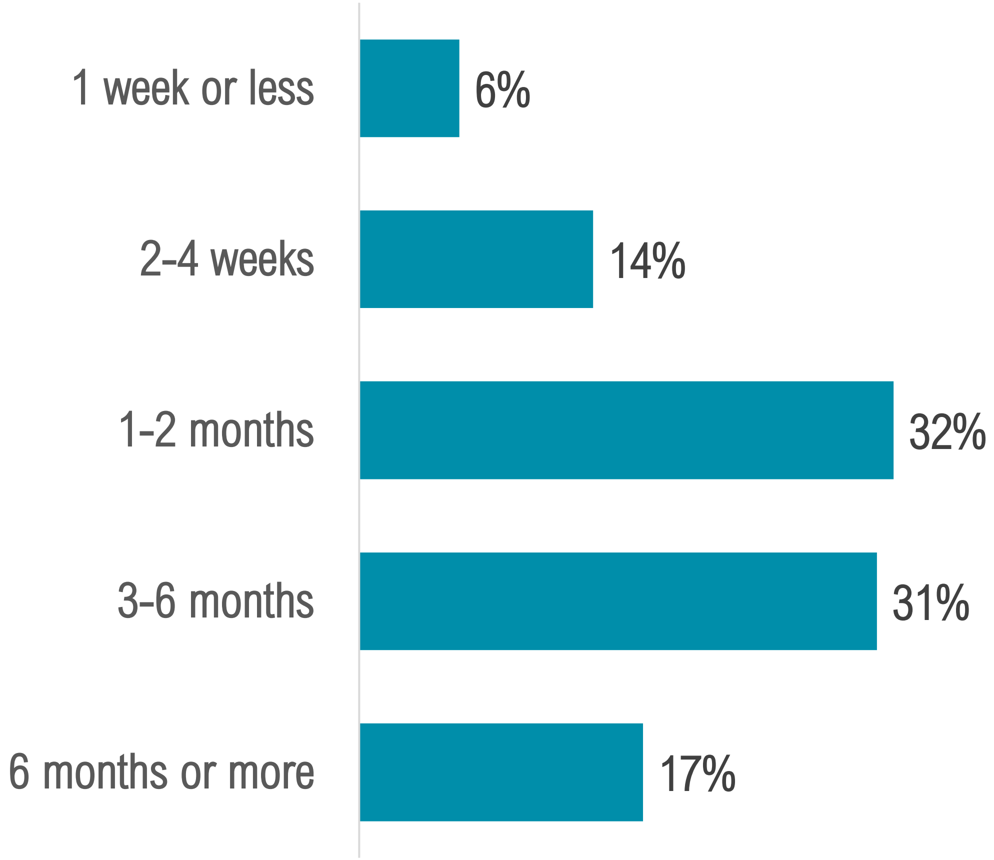
Visitor Journey: Pre-Visit

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

TRIP PLANNING CYCLE

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

The average trip planning cycle lasted nearly 3 months (89 days).

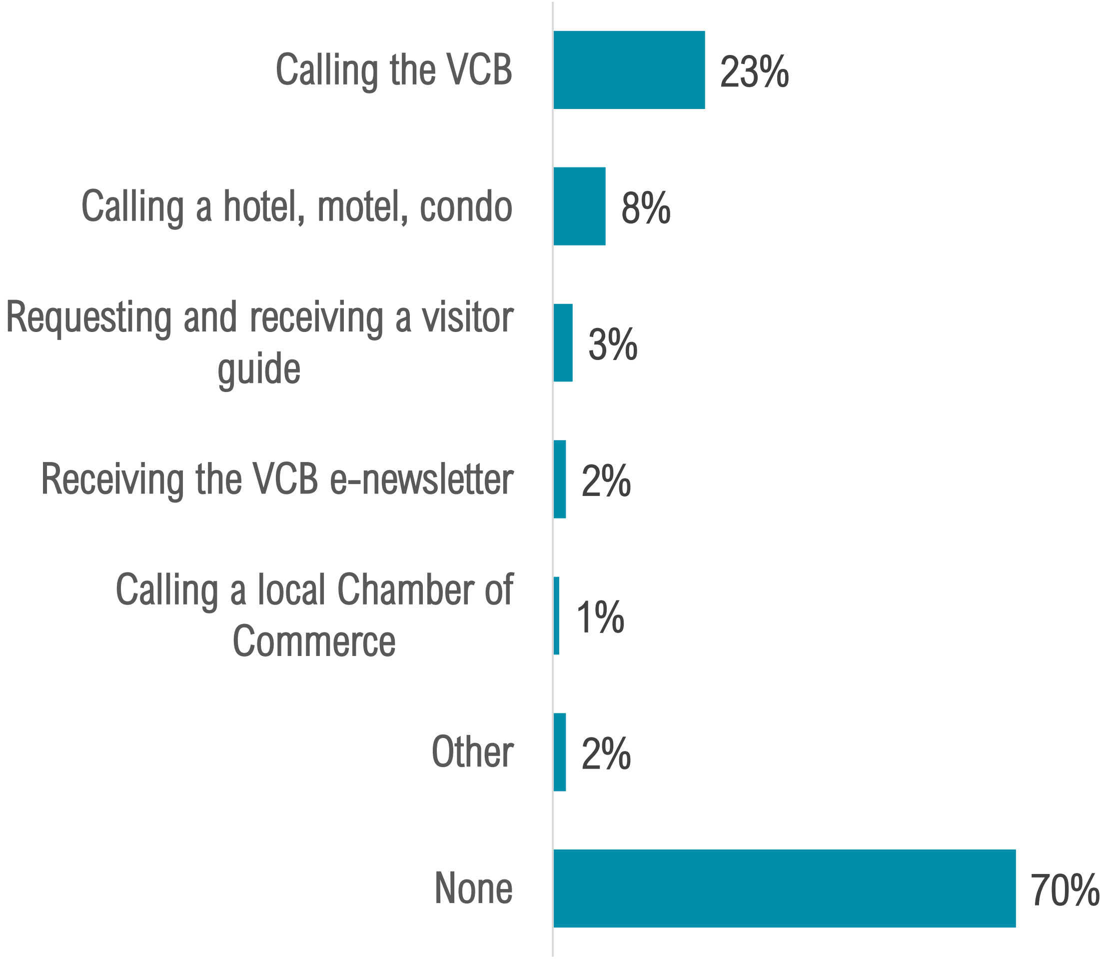


TRIP PLANNING: INFORMATION REQUESTS[1]

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 the VCB or on lodging properties for that information.

The share of visitors requesting information in Q2 2023 was lower than in Q2 2022.



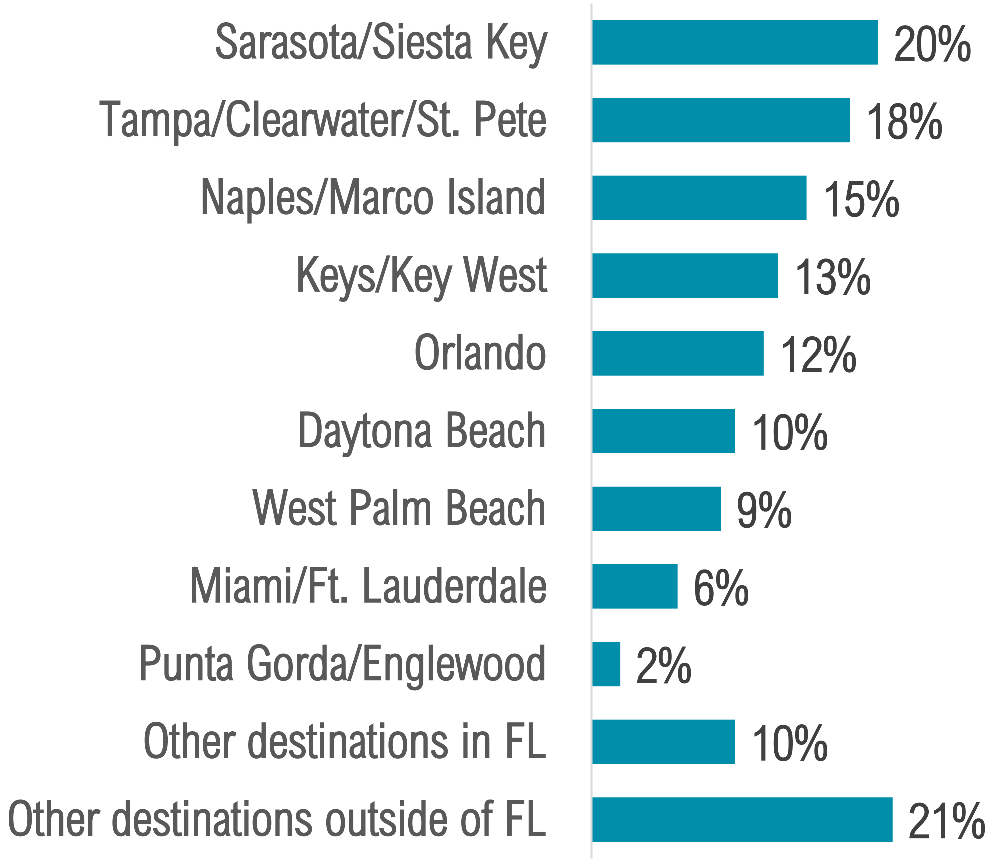
[1]Multiple responses permitted.

TRIP PLANNING: OTHER DESTINATIONS CONSIDERED[1]

Most alternate destinations considered were in Florida.

Only 1 in 5 visitors considered destinations outside of Florida.

BASE: 29% of visitors who considered other destinations



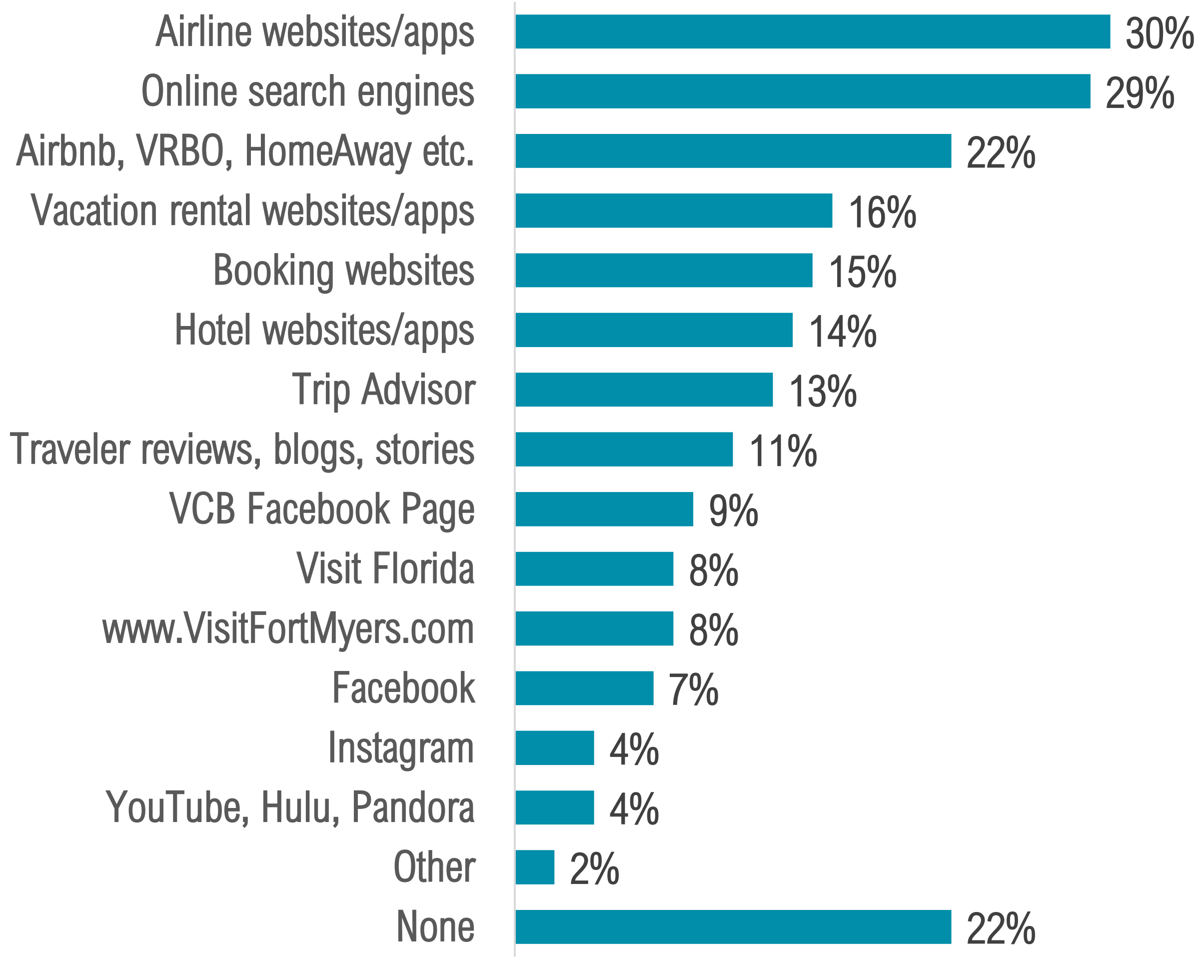
[1]Multiple responses permitted.

TRIP PLANNING: WEBSITES/APPS USED[1]

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

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

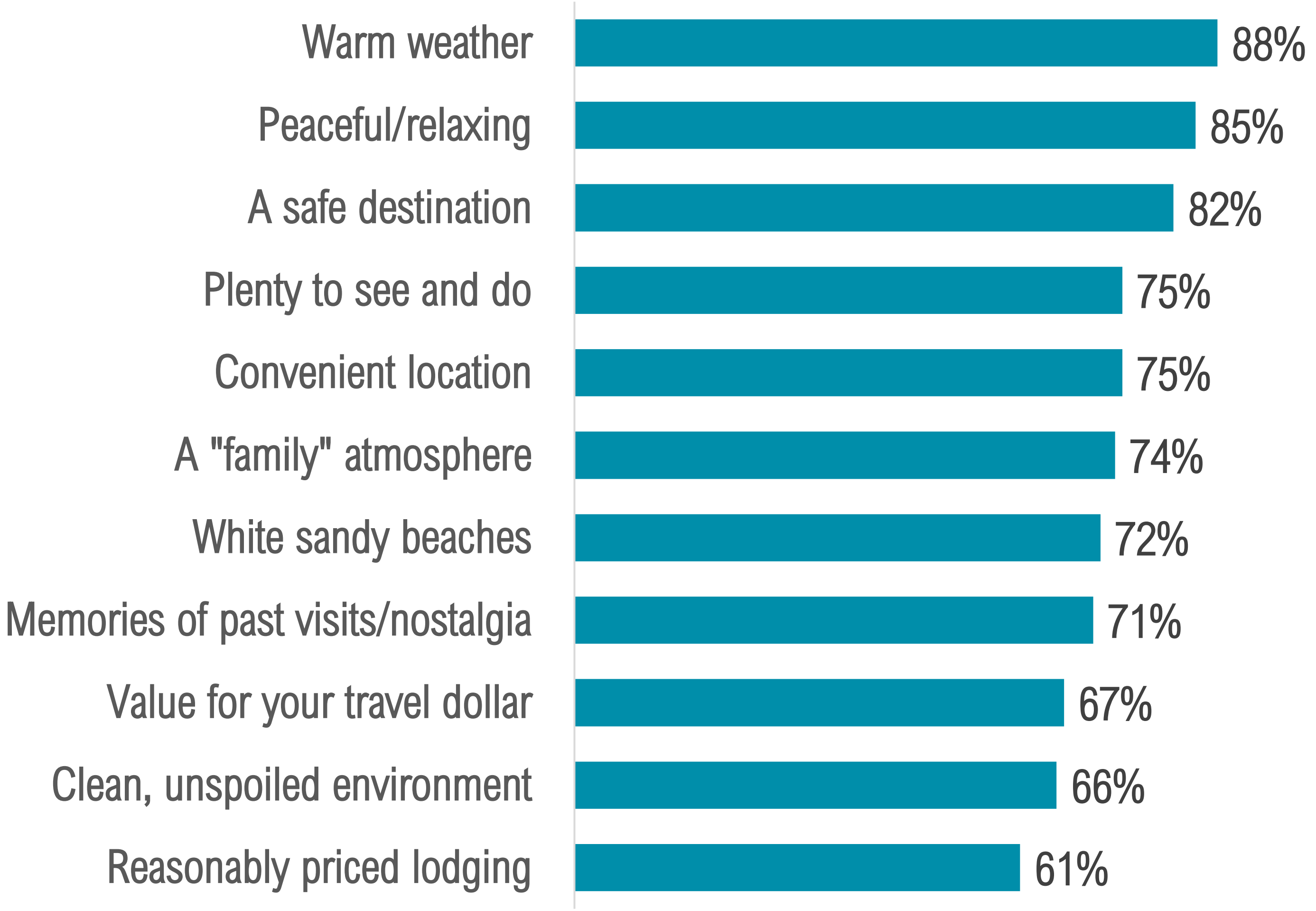
Over **1 in 5** visitors used **Airbnb, VRBO, HomeAway, or similar websites** to plan their trips.



[1]Multiple responses permitted.

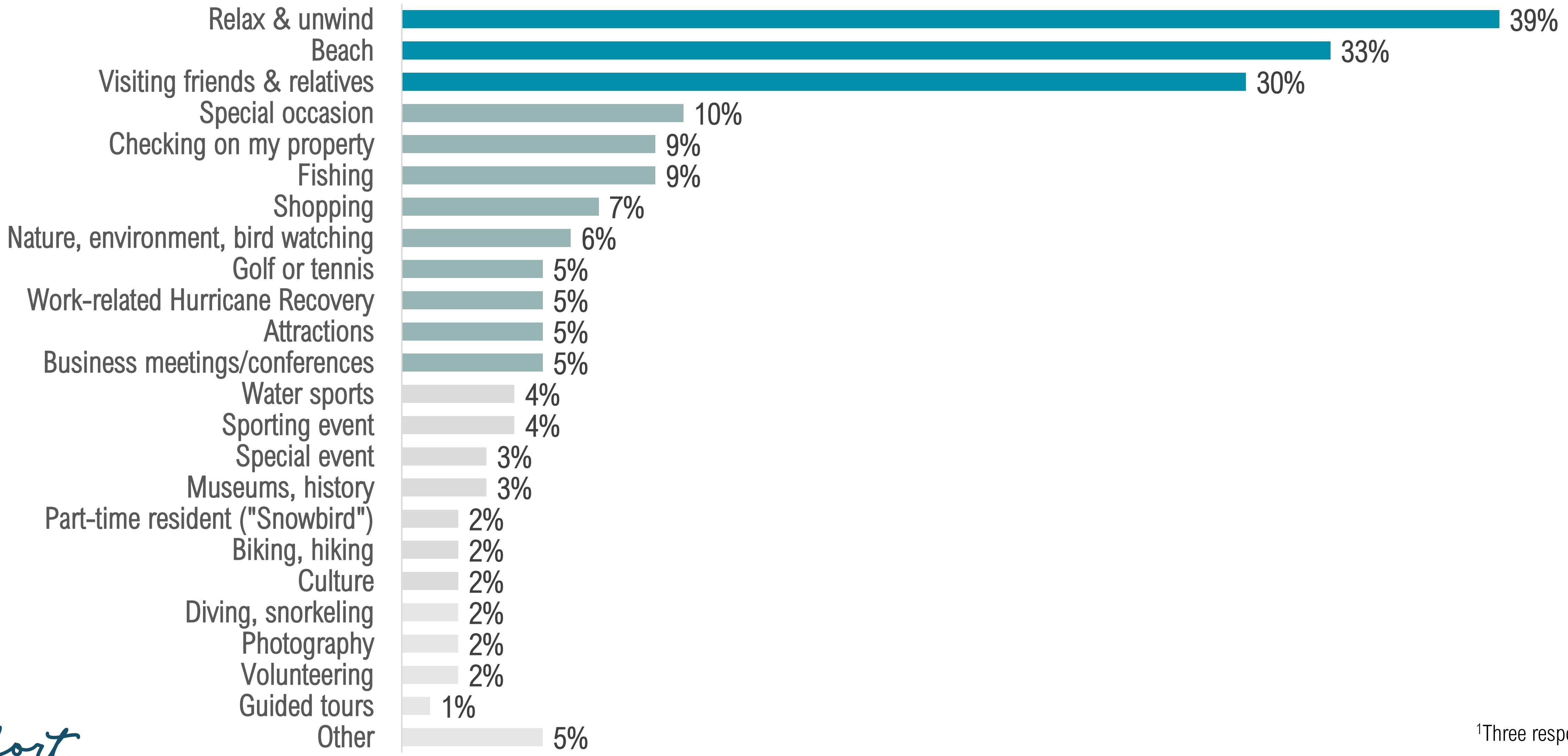
TRIP INFLUENCERS[1]

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]



[1]Three responses permitted.

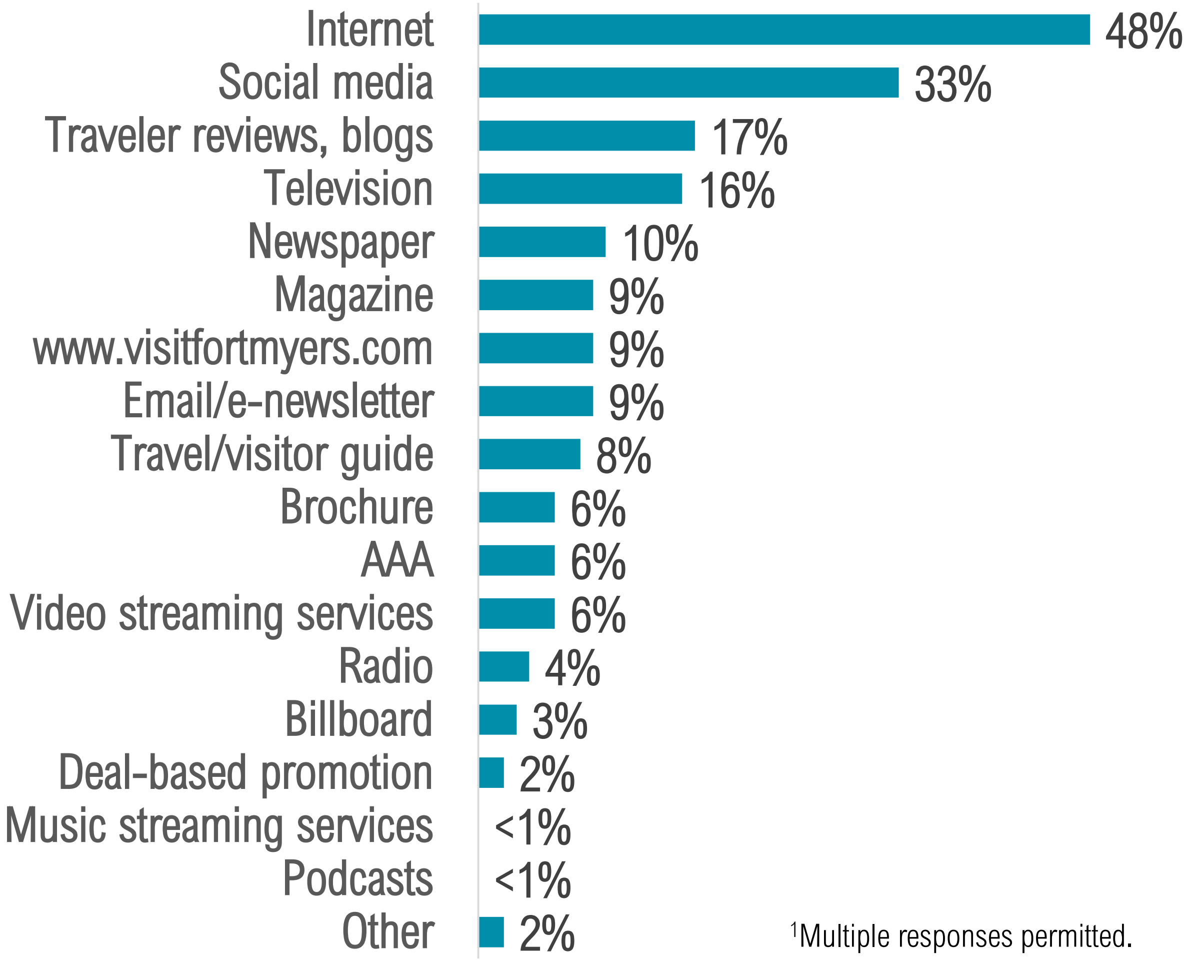
PROMOTIONS[1]

42% of visitors **recalled promotions** in the past 6 months for the Fort Myers area.

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

BASE: 42% of visitors who recalled promotions

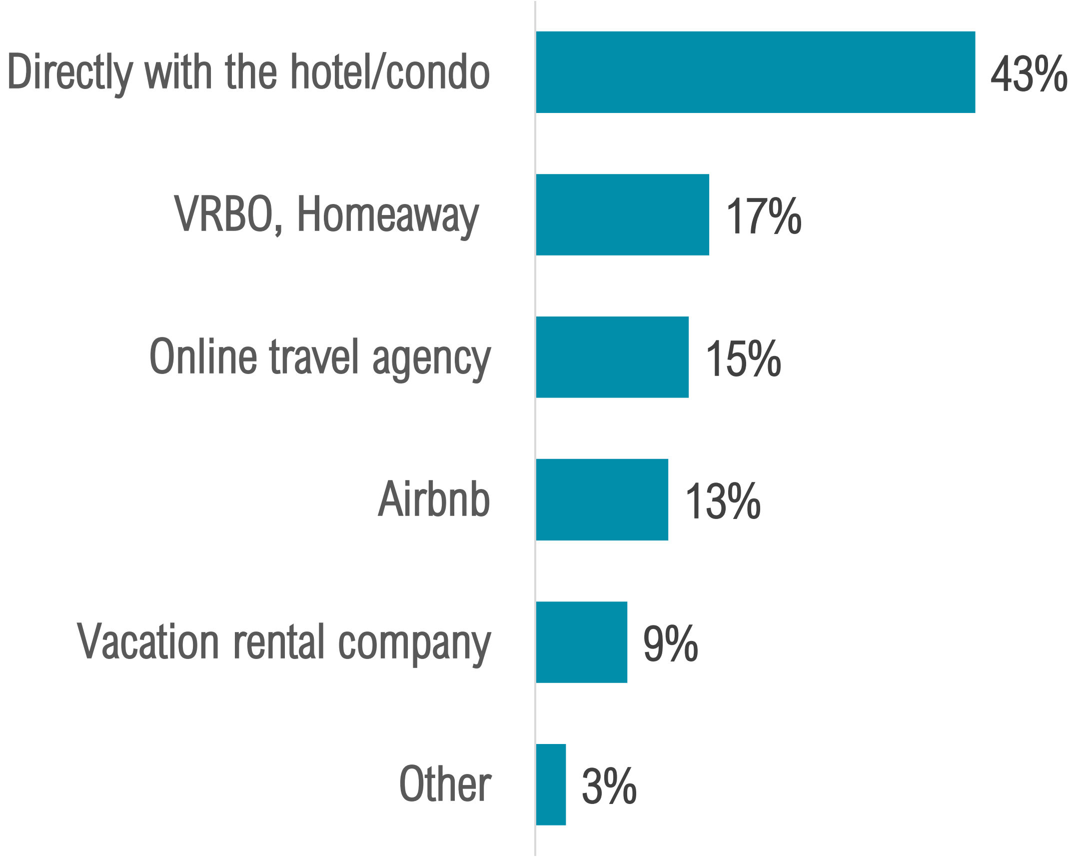
Source of Promotion



[1] Multiple responses permitted.

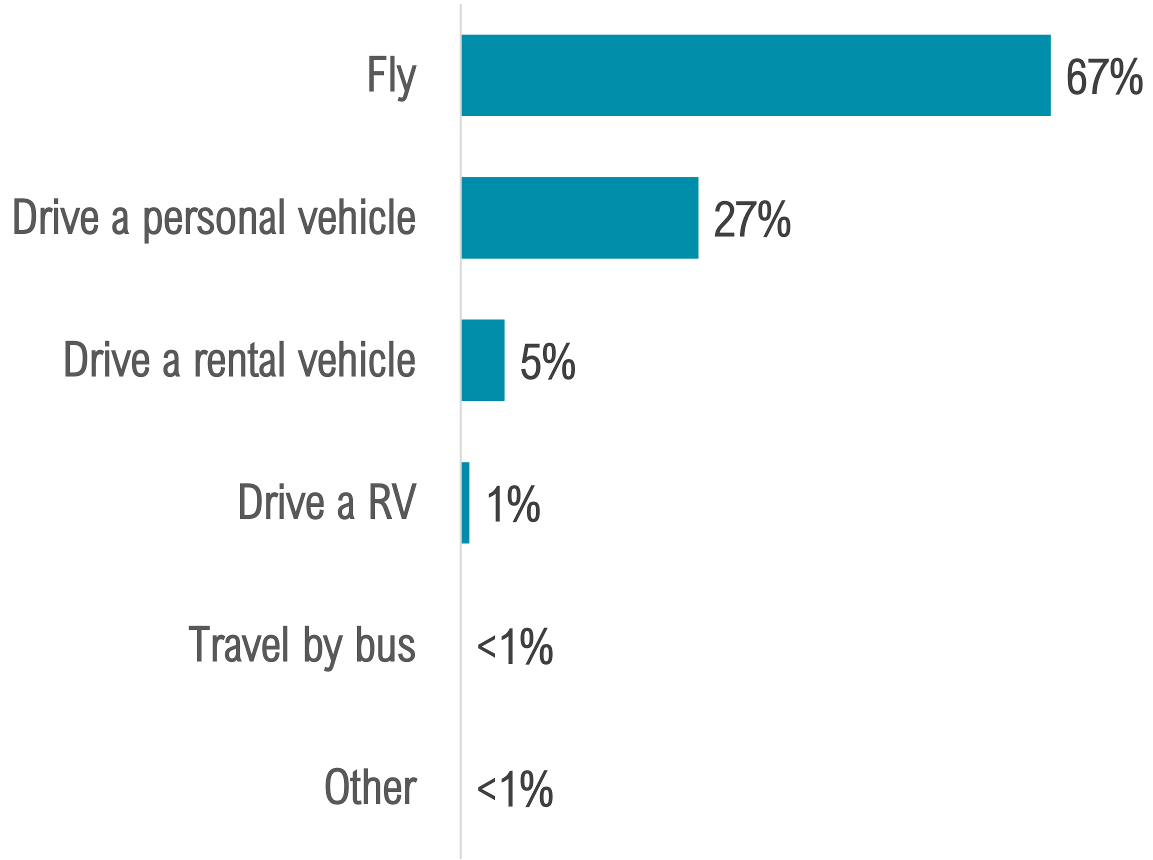
BOOKING

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



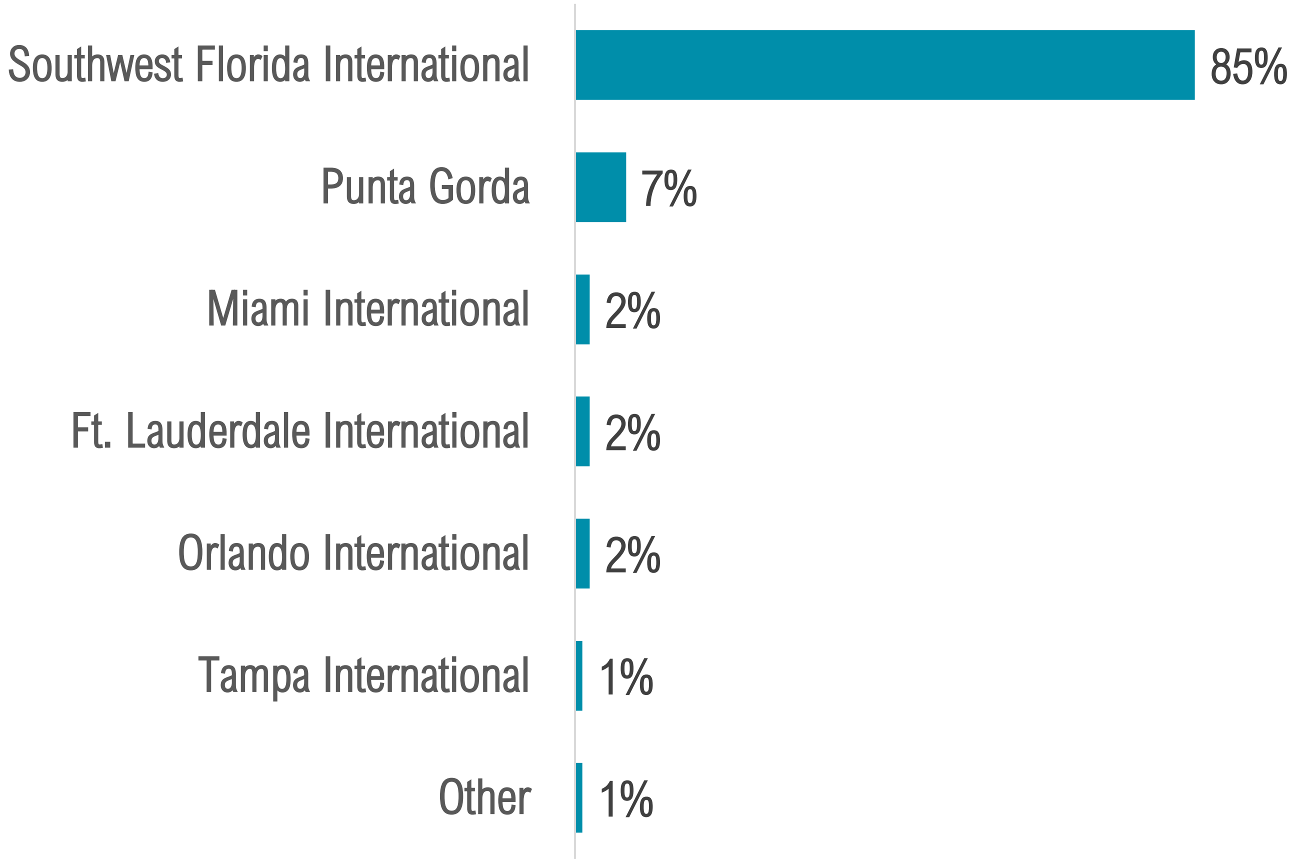
TRANSPORTATION

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



AIRPORT

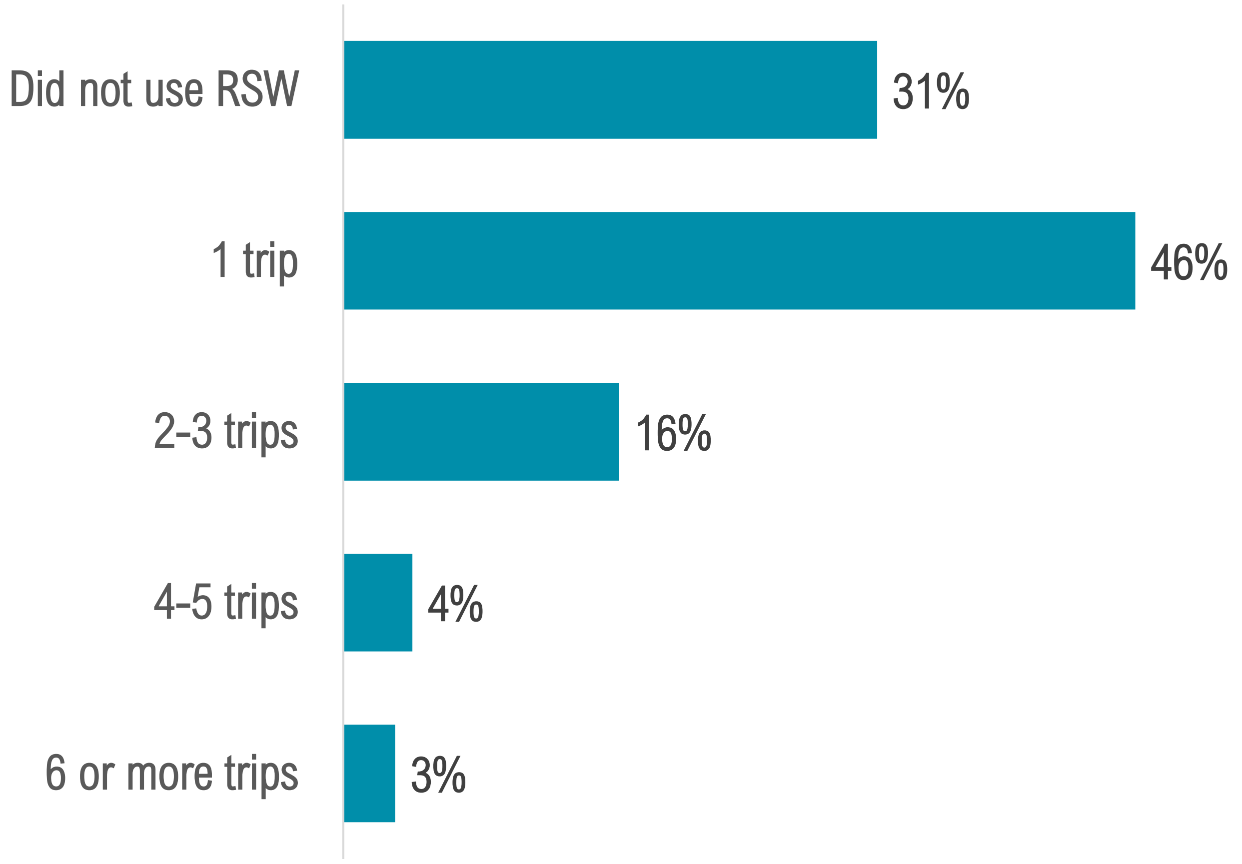
BASE: 67% of visitors who flew



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

USE OF RSW IN THE PAST YEAR

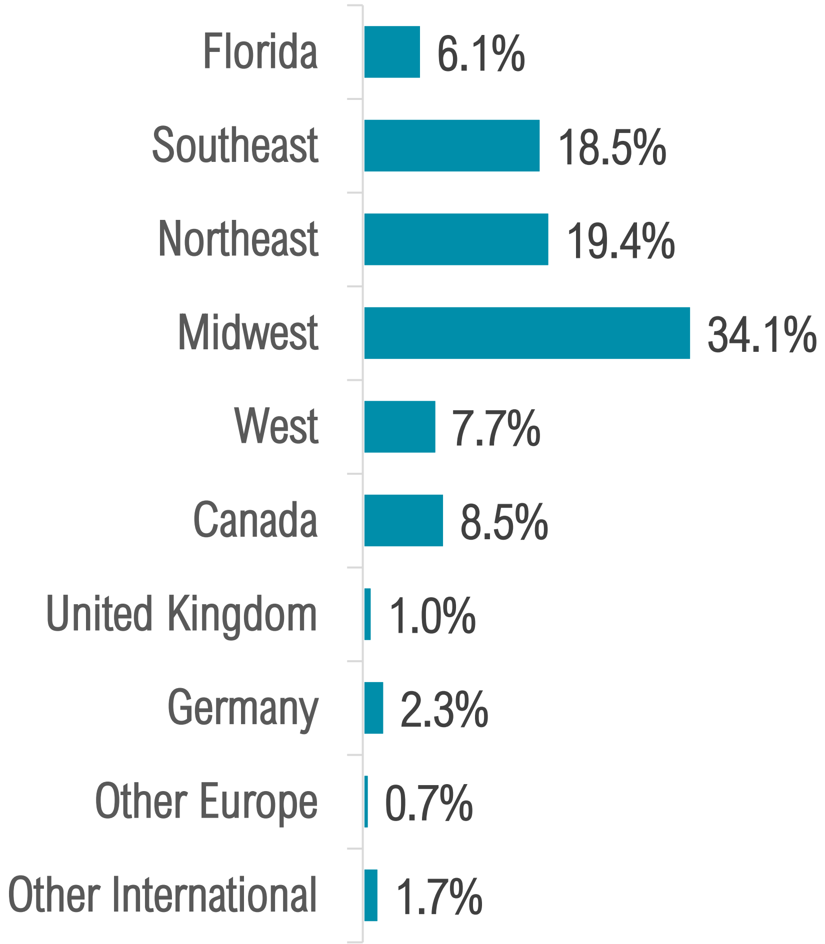
69% of visitors used RSW **at least once** in the past year.

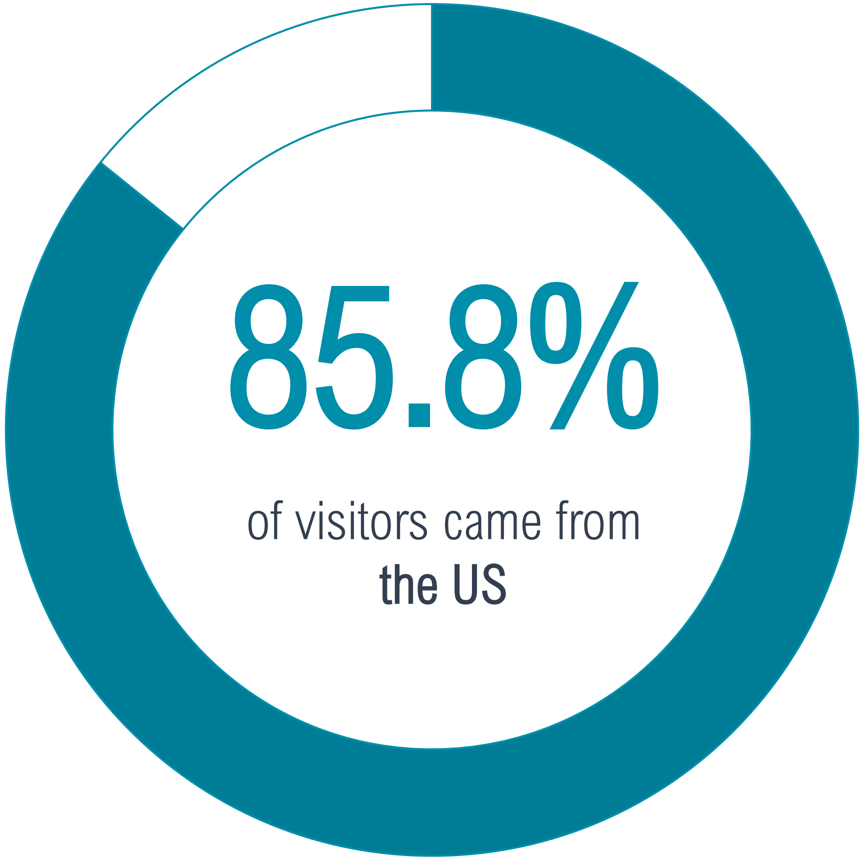


VISITOR JOURNEY: TRAVEL PARTY PROFILE

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

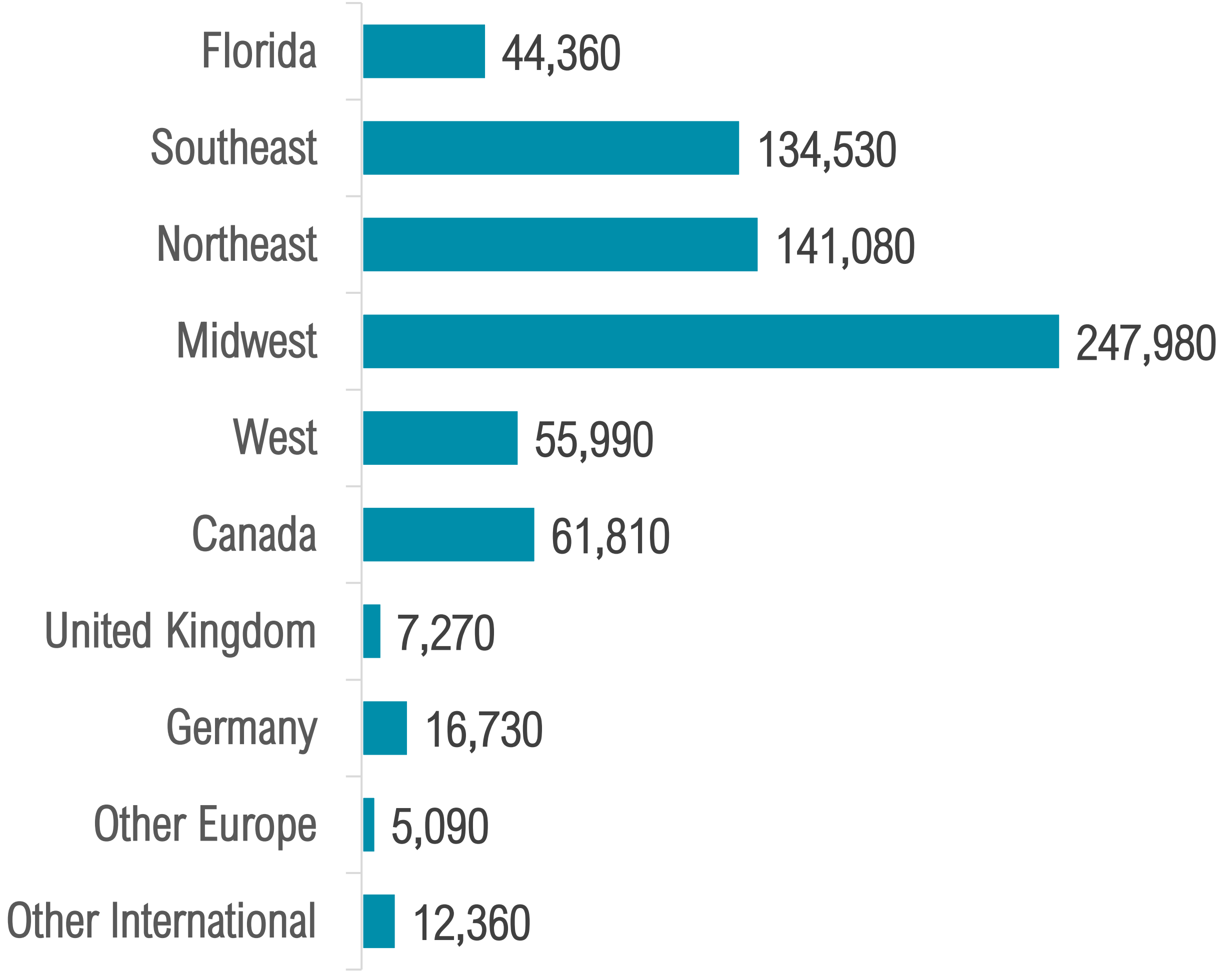
ORIGIN[1]





[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.

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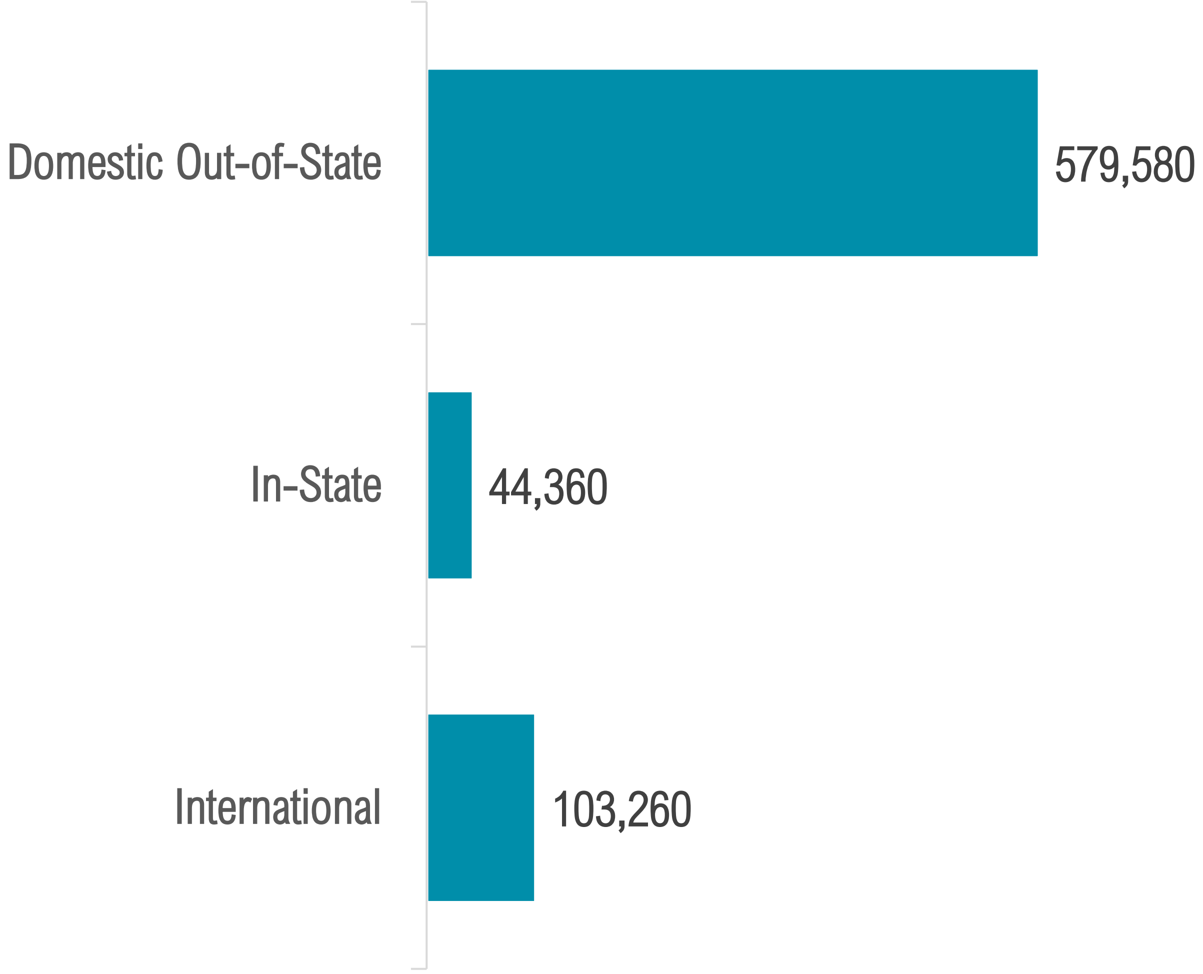
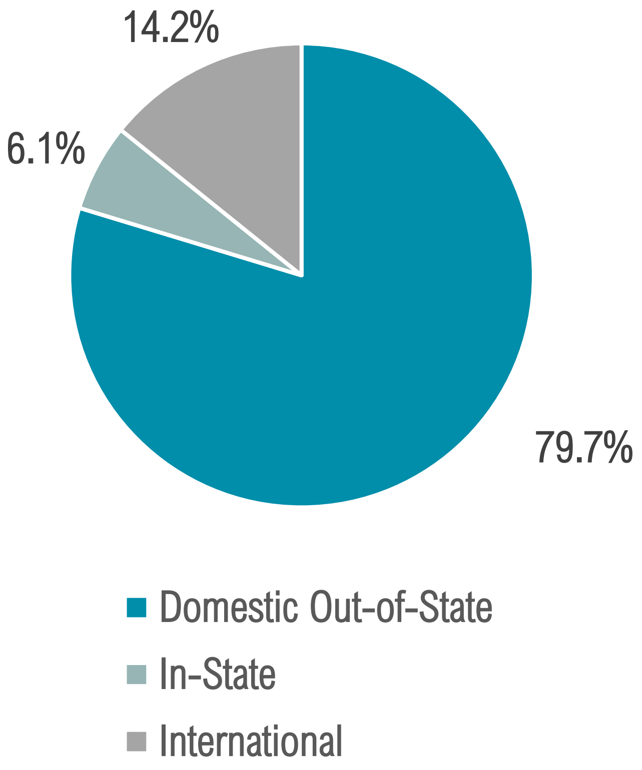
RESEARCH

NUMBER OF VISITORS BY ORIGIN

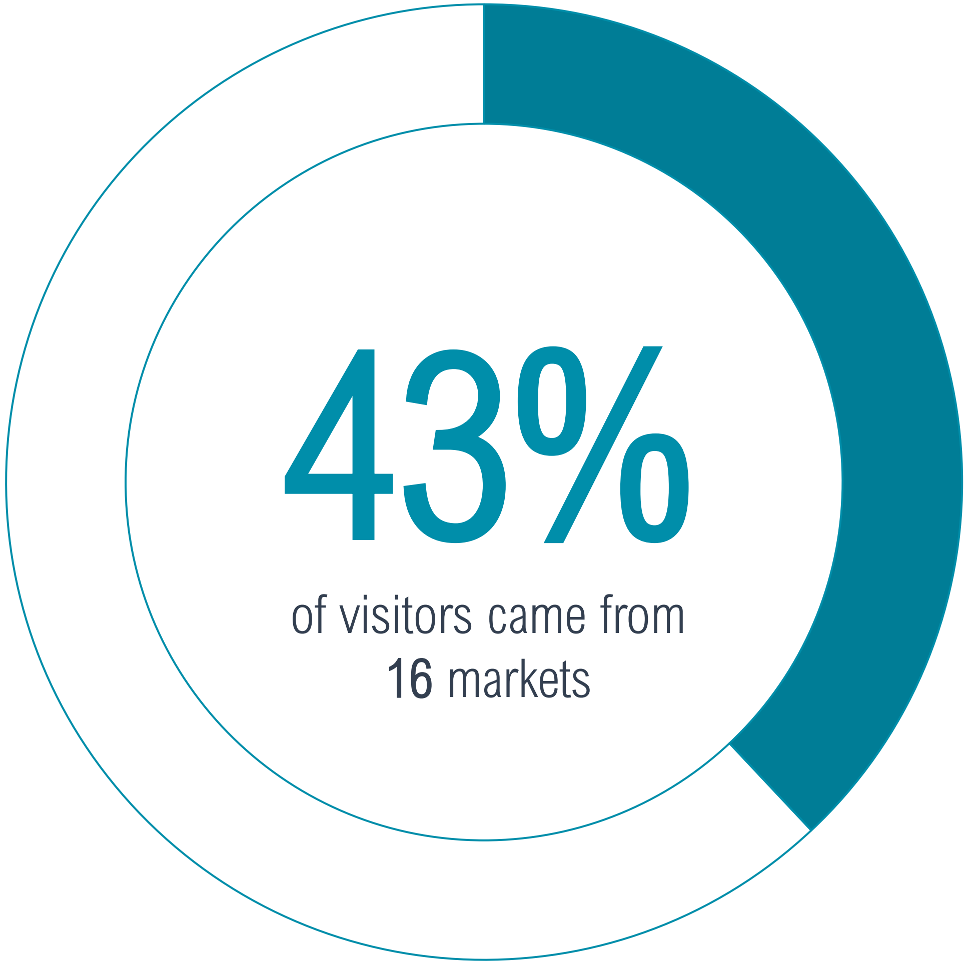




[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers. Based on data from the Visitor Tracking Study.

ORIGIN MARKETS[1]

Market [2]	Percentage of Visitors
NEW YORK	5%
ATLANTA	4%
CHICAGO	4%
WASHINGTON, D.C. - HAGERSTOWN	3%
BOSTON	3%
MINNEAPOLIS - SAINT PAUL	3%
DETROIT	3%
CINCINNATI	2%
DENVER	2%
SAINT LOUIS	2%
CLEVELAND - AKRON	2%
MILWAUKEE	2%
PHILADELPHIA	2%
HOUSTON	2%
NAPLES & SURROUNDING AREAS	2%
DALLAS - FORT WORTH	2%



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

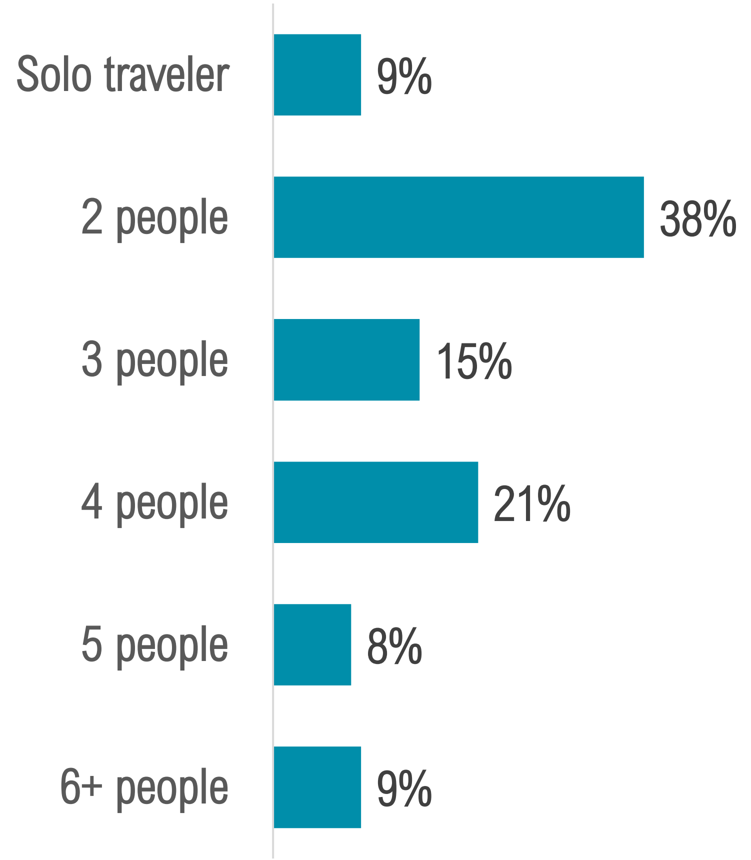
TRAVEL PARTY SIZE AND COMPOSITION

Travel Party Size

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

Travel with Children

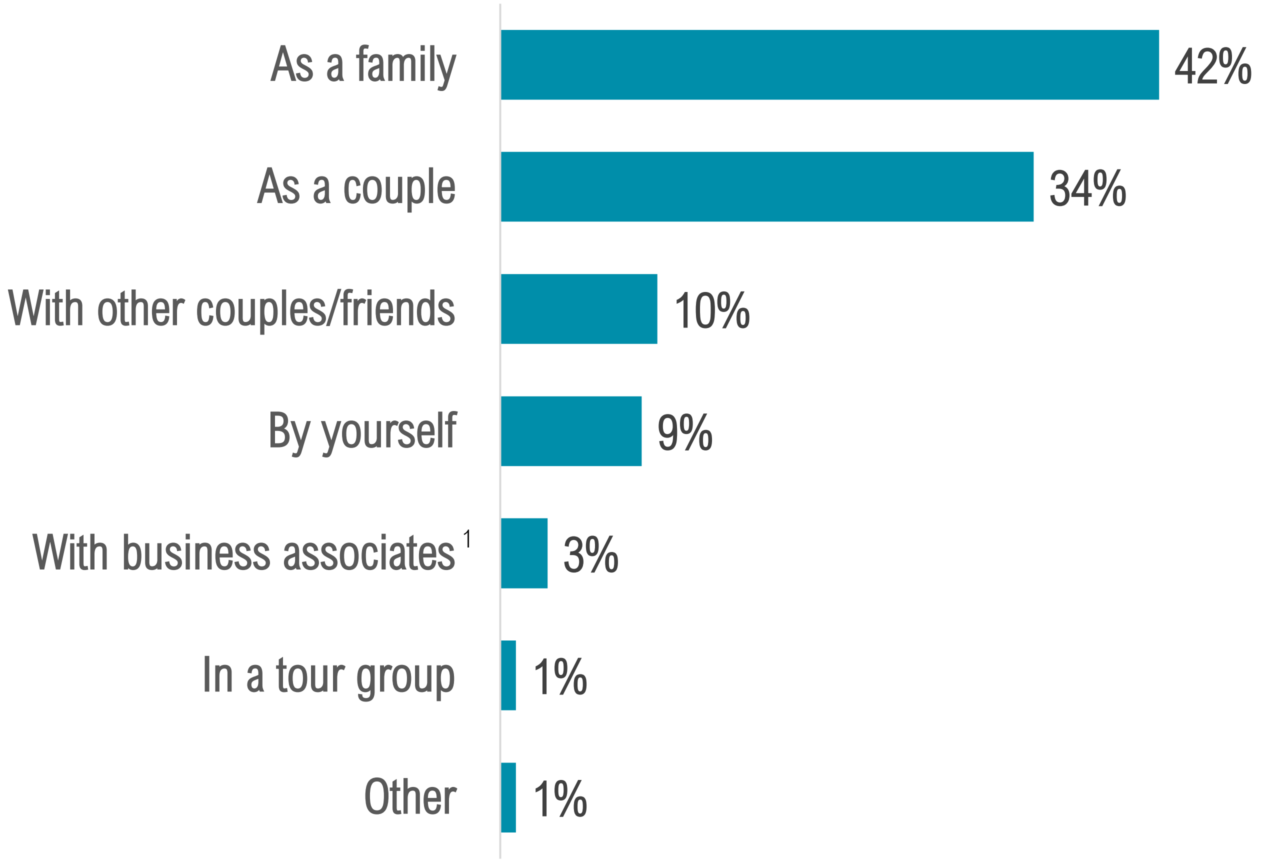
35% of visitors **traveled with children** under the age of 18.



[1]Sources: Occupancy Study and Visitor Tracking Study

TRAVEL PARTY TYPE

Over 2 in 5 visitors traveled as a family, while over 1 in 3 traveled as a couple, and roughly 1 in 10 visitors traveled with other couples/friends or by themself.



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

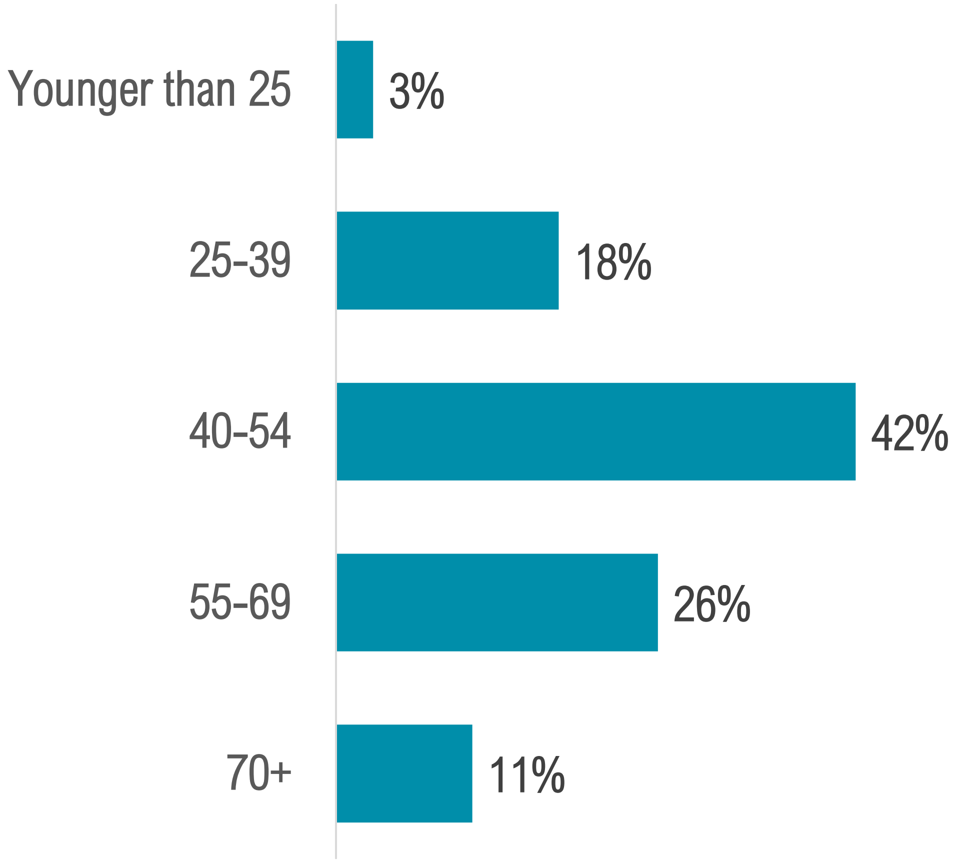
AGE

Average Age

The average age of April - June visitors was 51 years old.

Median Age

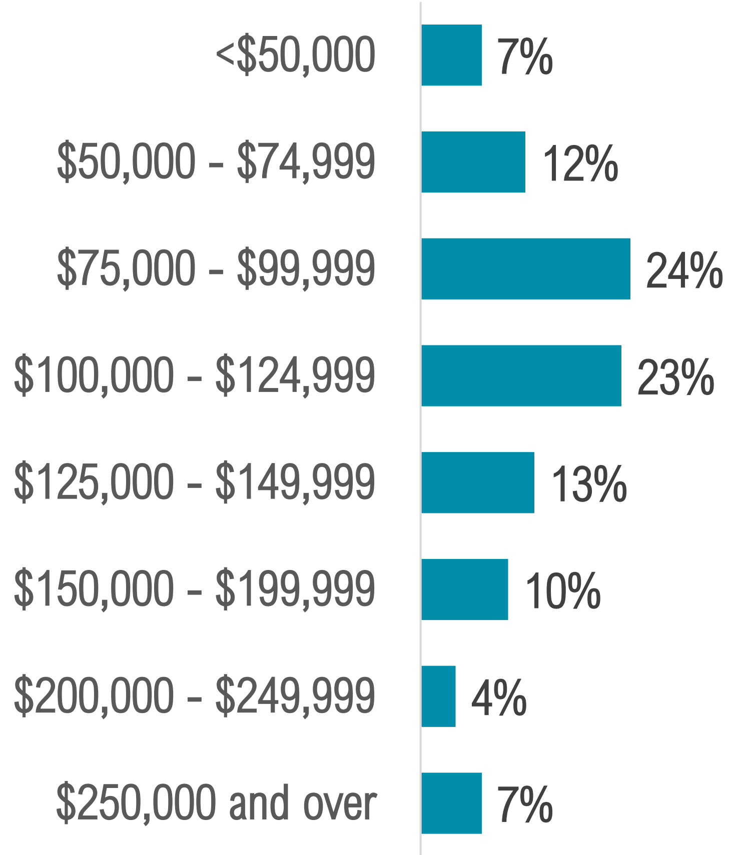
The median age of April - June visitors was 50 years old.



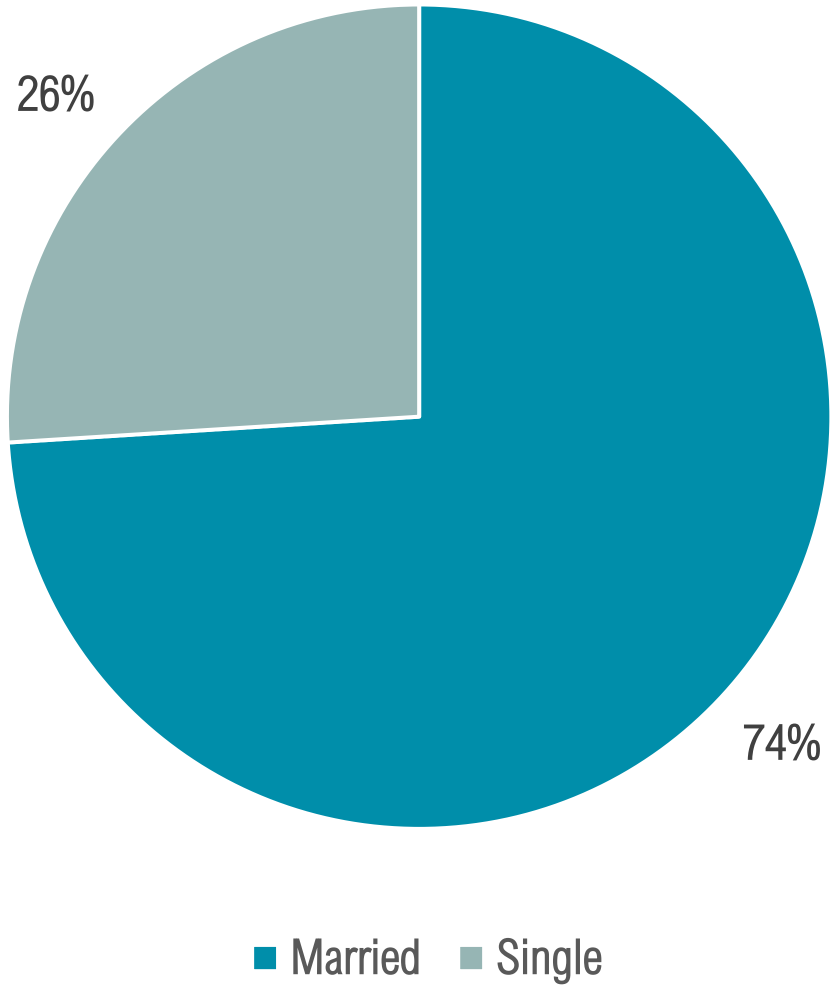
HOUSEHOLD INCOME

Median Household Income
April - June visitors had a median household income of **$107,600.**

11% of visitors had a household income in excess of **$200,000.**



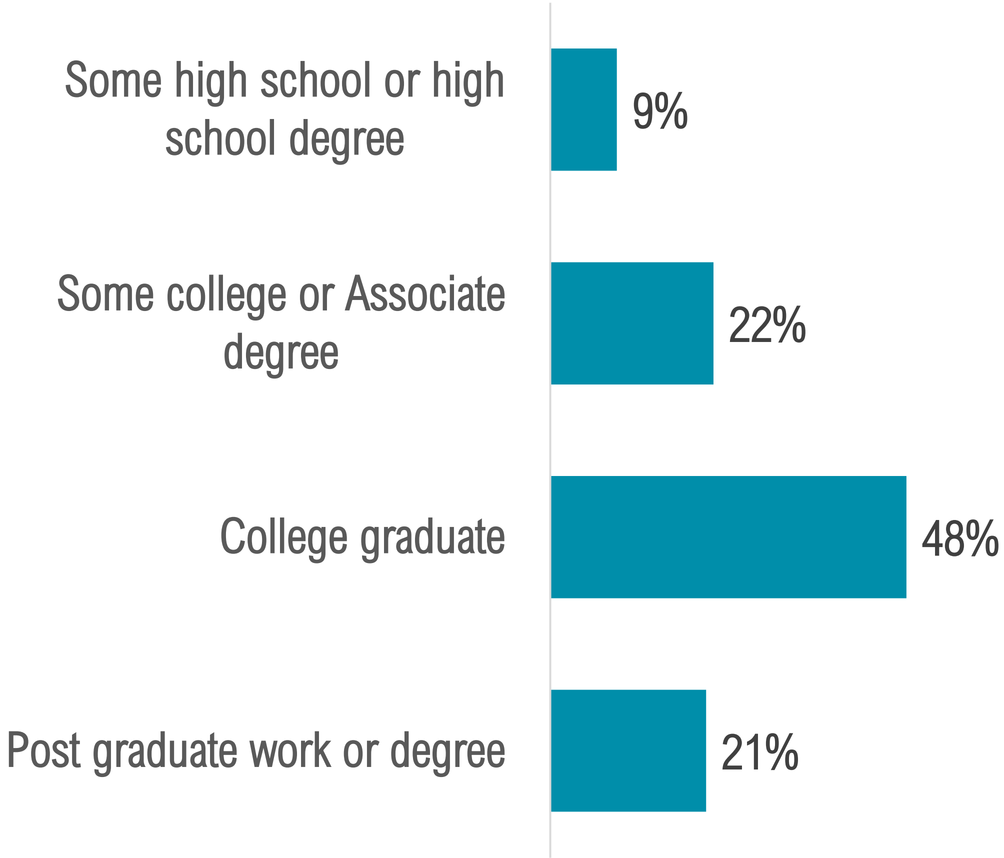
MARITAL STATUS



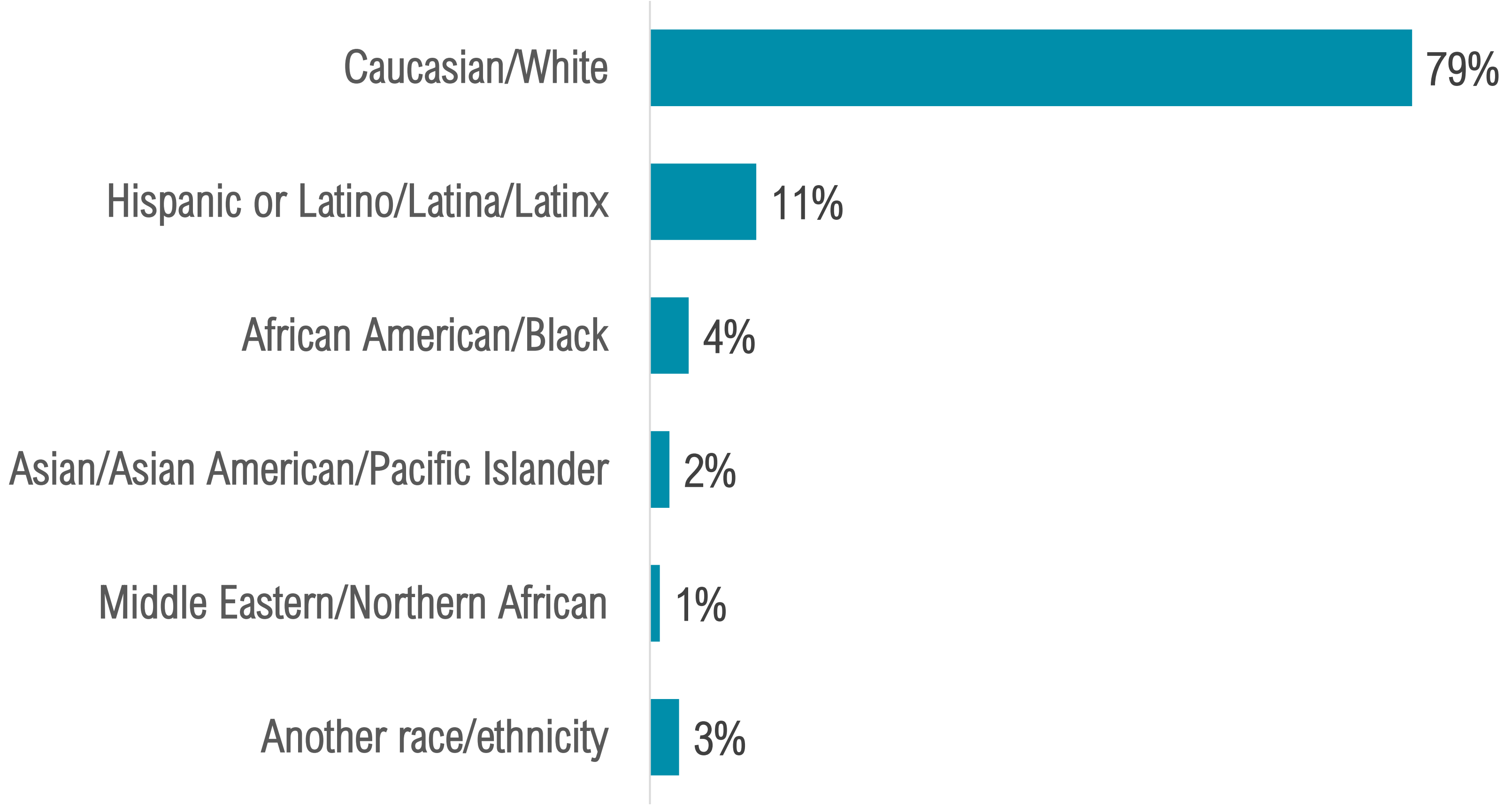
EDUCATION

Education Level

Nearly 7 in 10 of April - June visitors have achieved a bachelor's degree or higher.

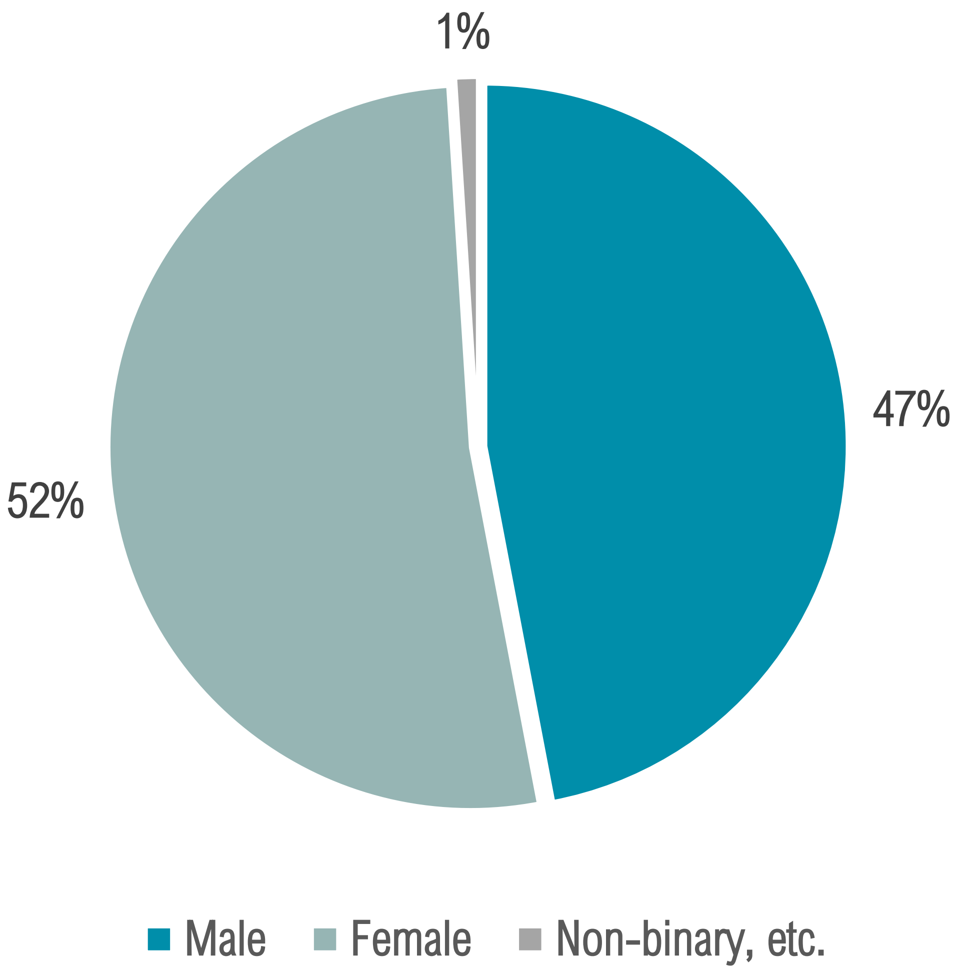


RACE/ETHNICITY



GENDER[1]

Marital Status



[1]Gender of person interviewed.

VISITOR JOURNEY: TRIP EXPERIENCE

Pre-Visit

Travel Party Profile

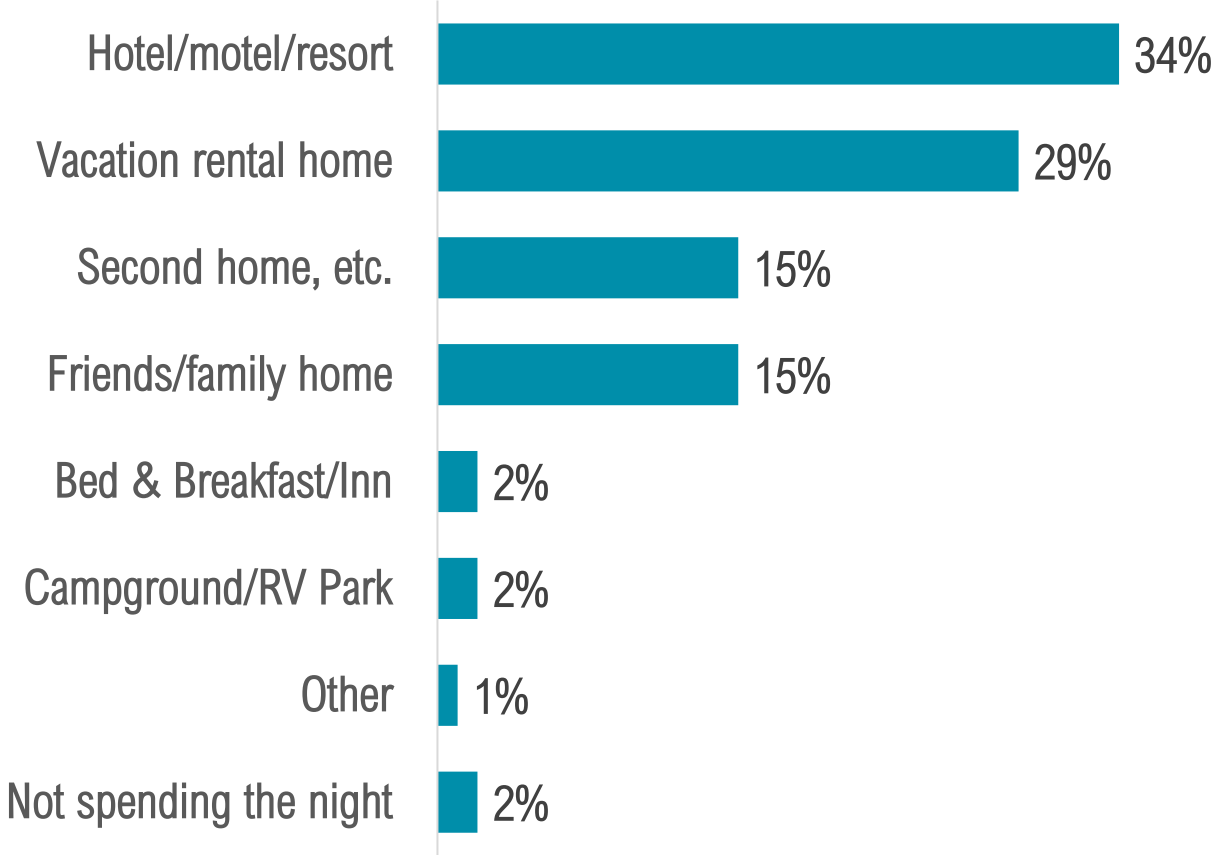
Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

ACCOMMODATIONS

Over 2 in 3 visitors stayed in paid accommodations



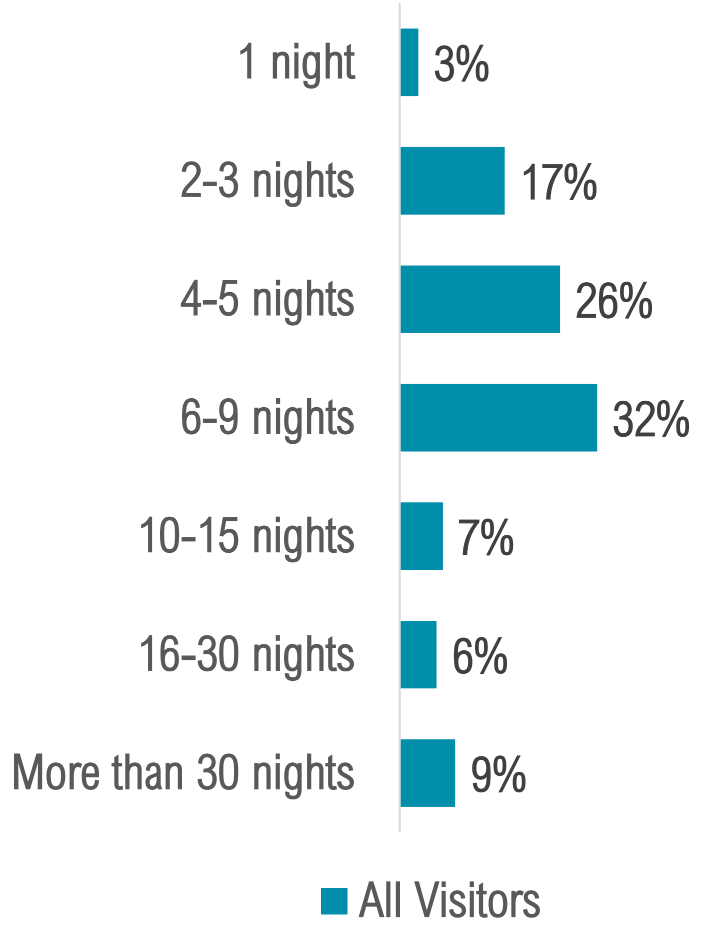
NIGHTS STAYED

All Visitors

Visitors spent an average of **6.1[1] nights** in the Fort Myers area.

Visitors Staying in Paid Accommodations

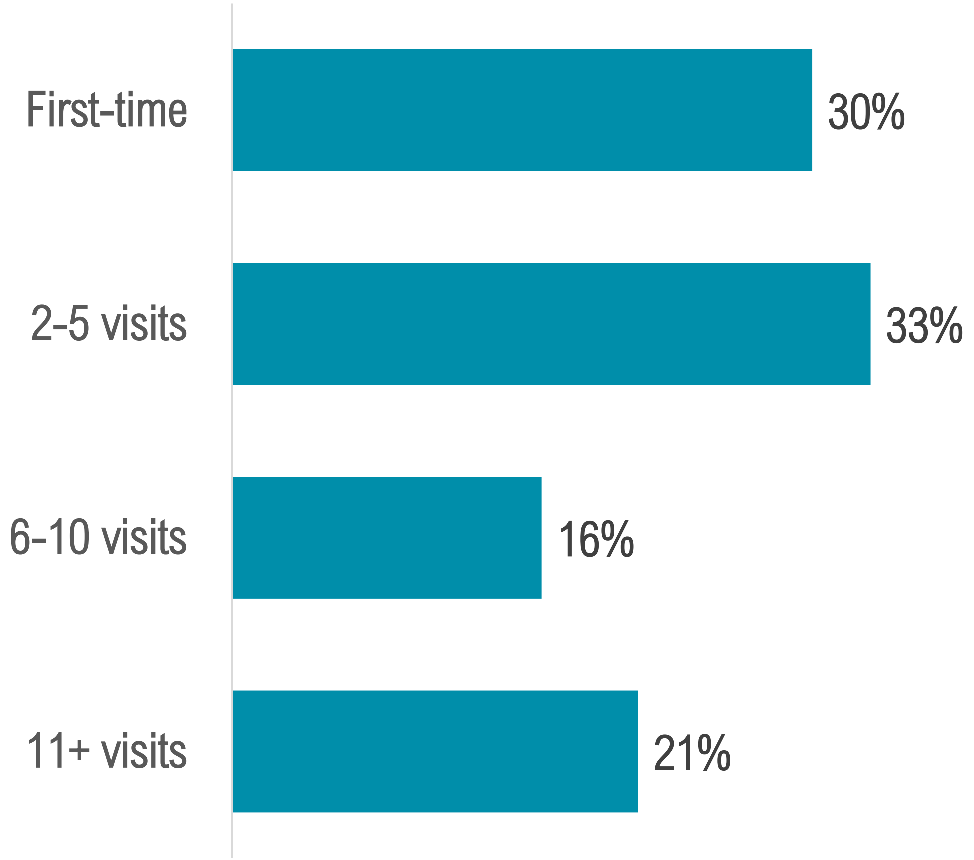
Visitors staying in paid accommodations spent an average of **5.9[2] nights** in the Fort Myers area.



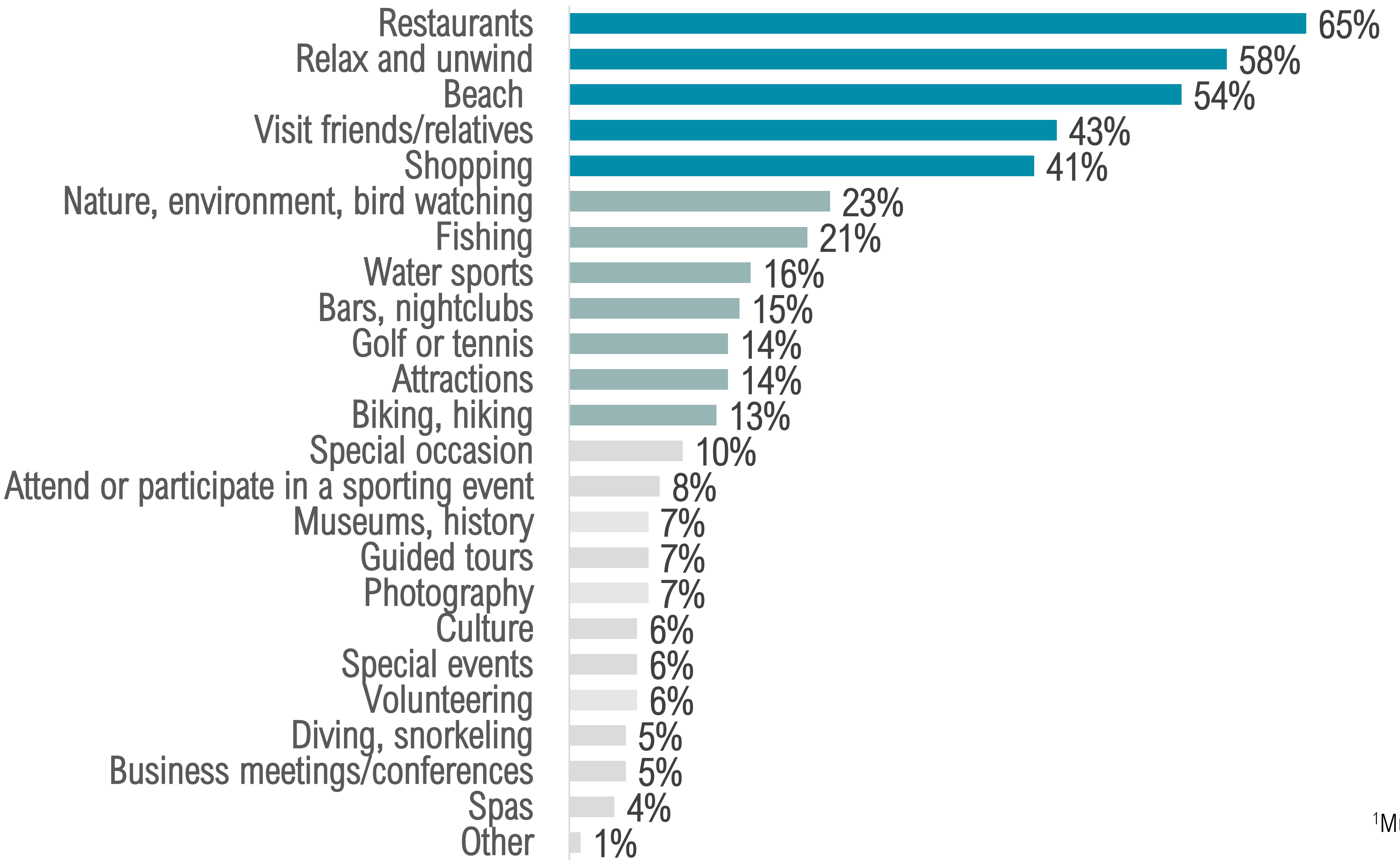
[1]Sources: Occupancy Study and Visitor Tracking Study
[2]Source: Occupancy Study

FIRST TIME AND EXPERIENCED VISITORS

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

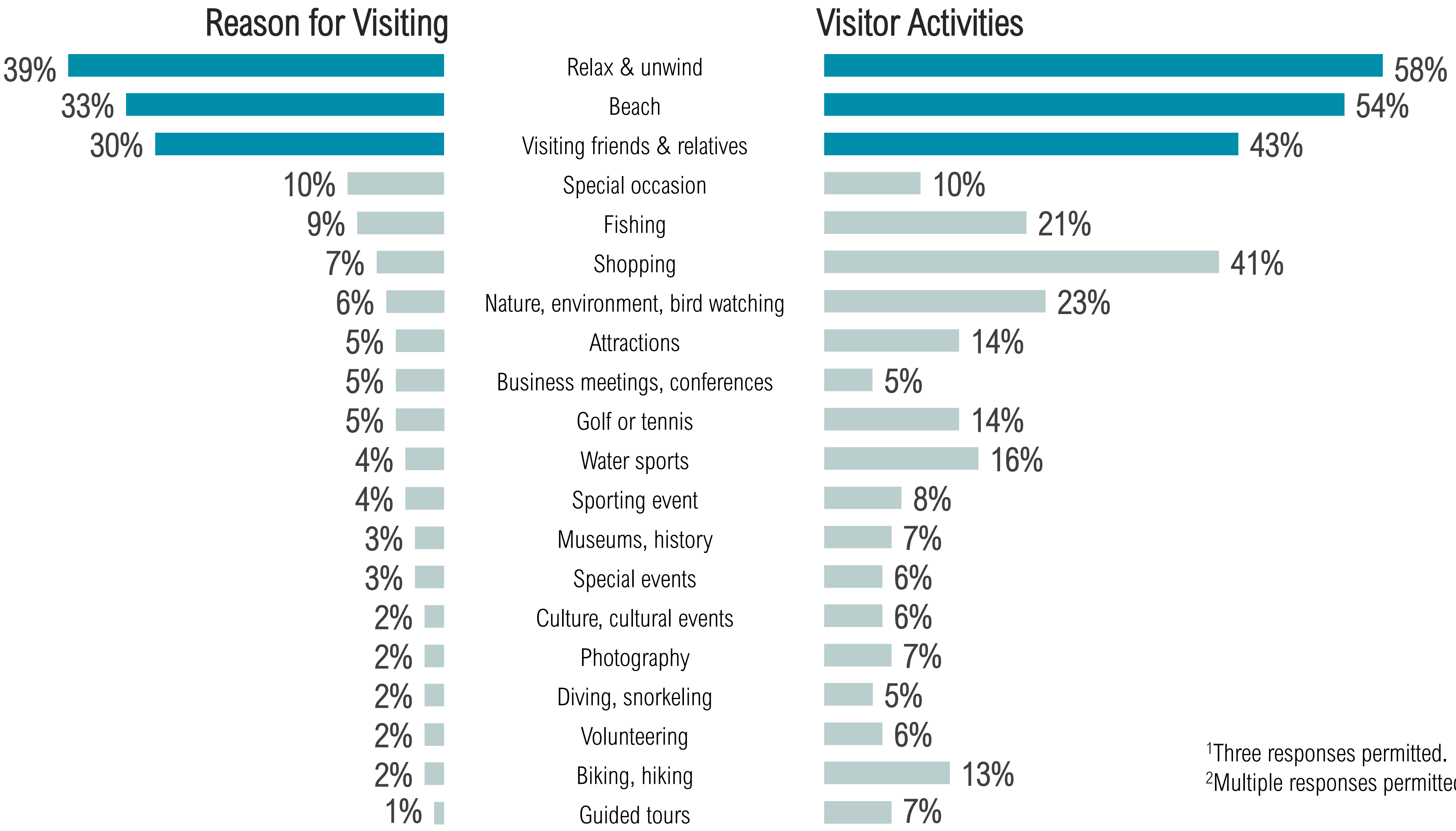


VISITOR ACTIVITIES[1]



[1]Multiple responses permitted.

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



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

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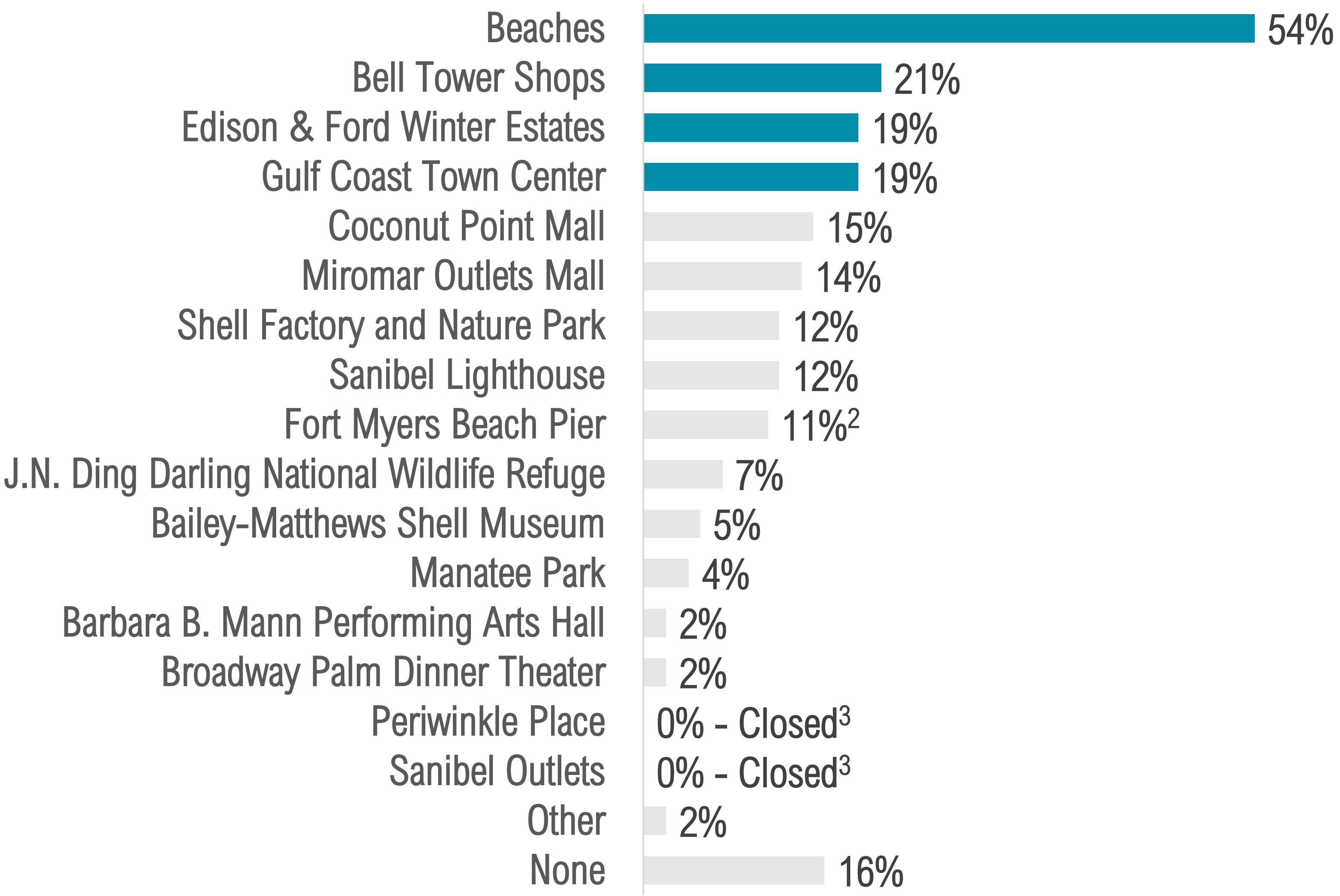
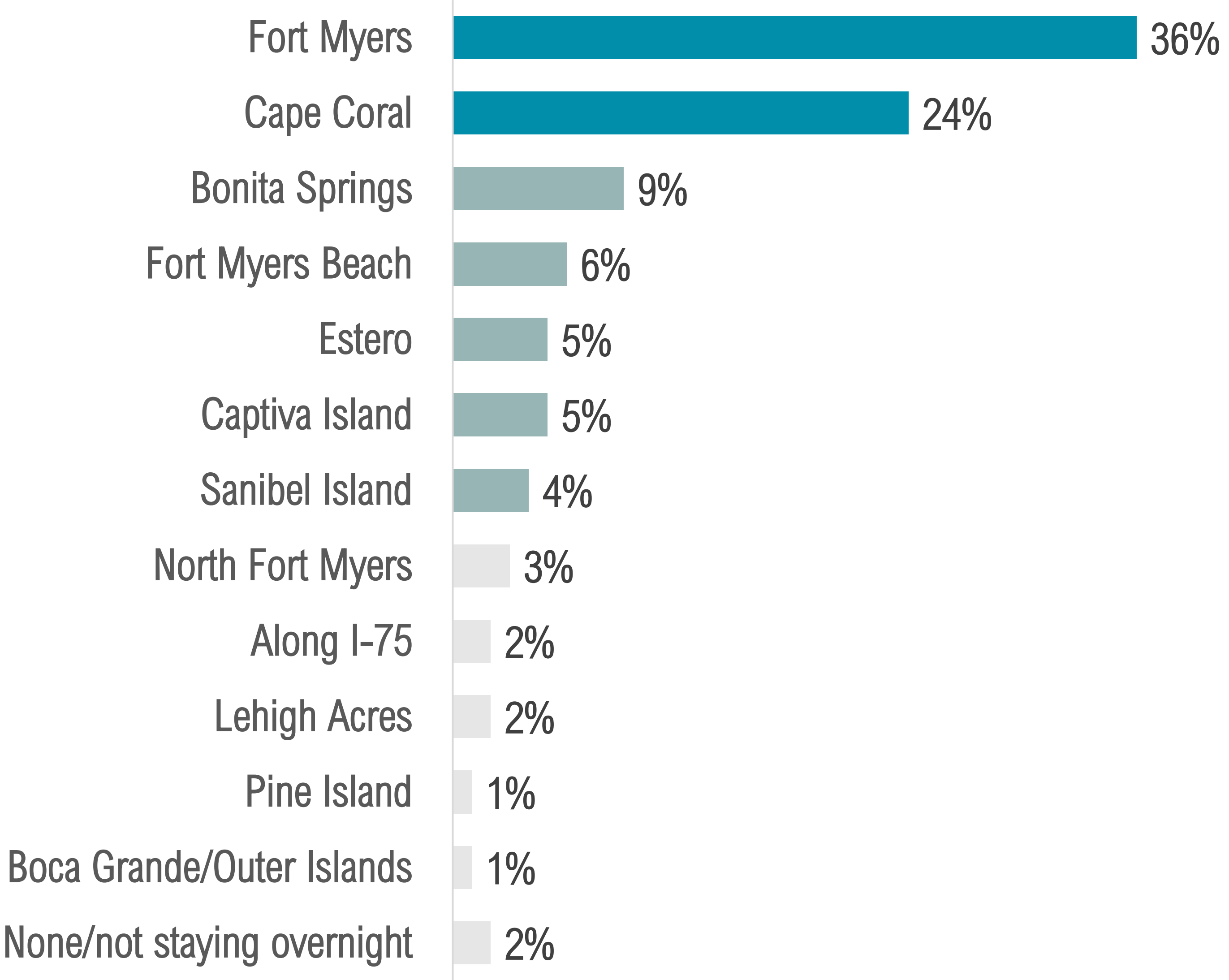
ATTRACTIONS VISITED[1]



[1]Multiple responses permitted.
[2]Represents visitors who spent time on the beach area near where the pier was.
[3]Closed due to Hurricane Ian.

Trip Experience
Apr - Jun 2023

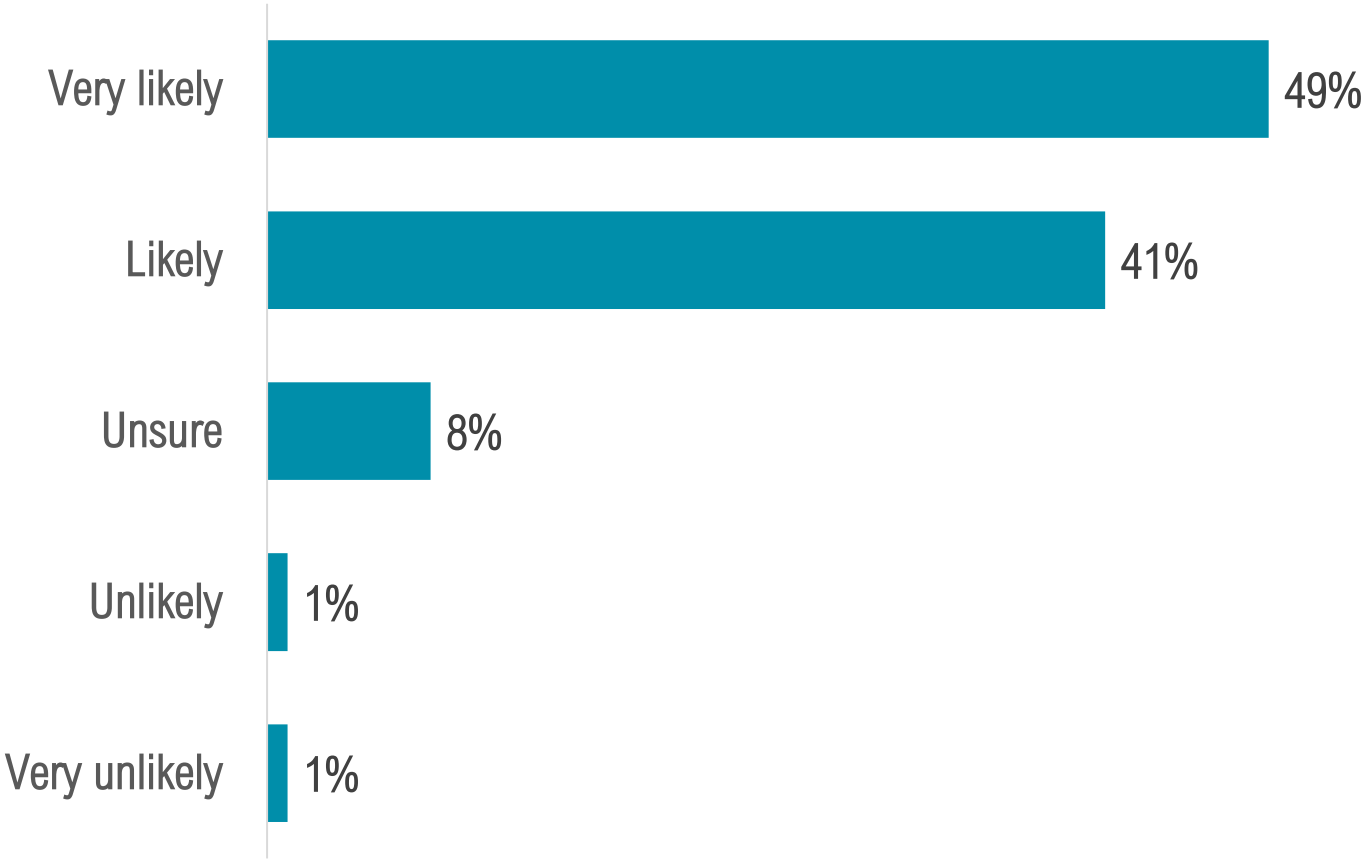
COMMUNITY STAYED



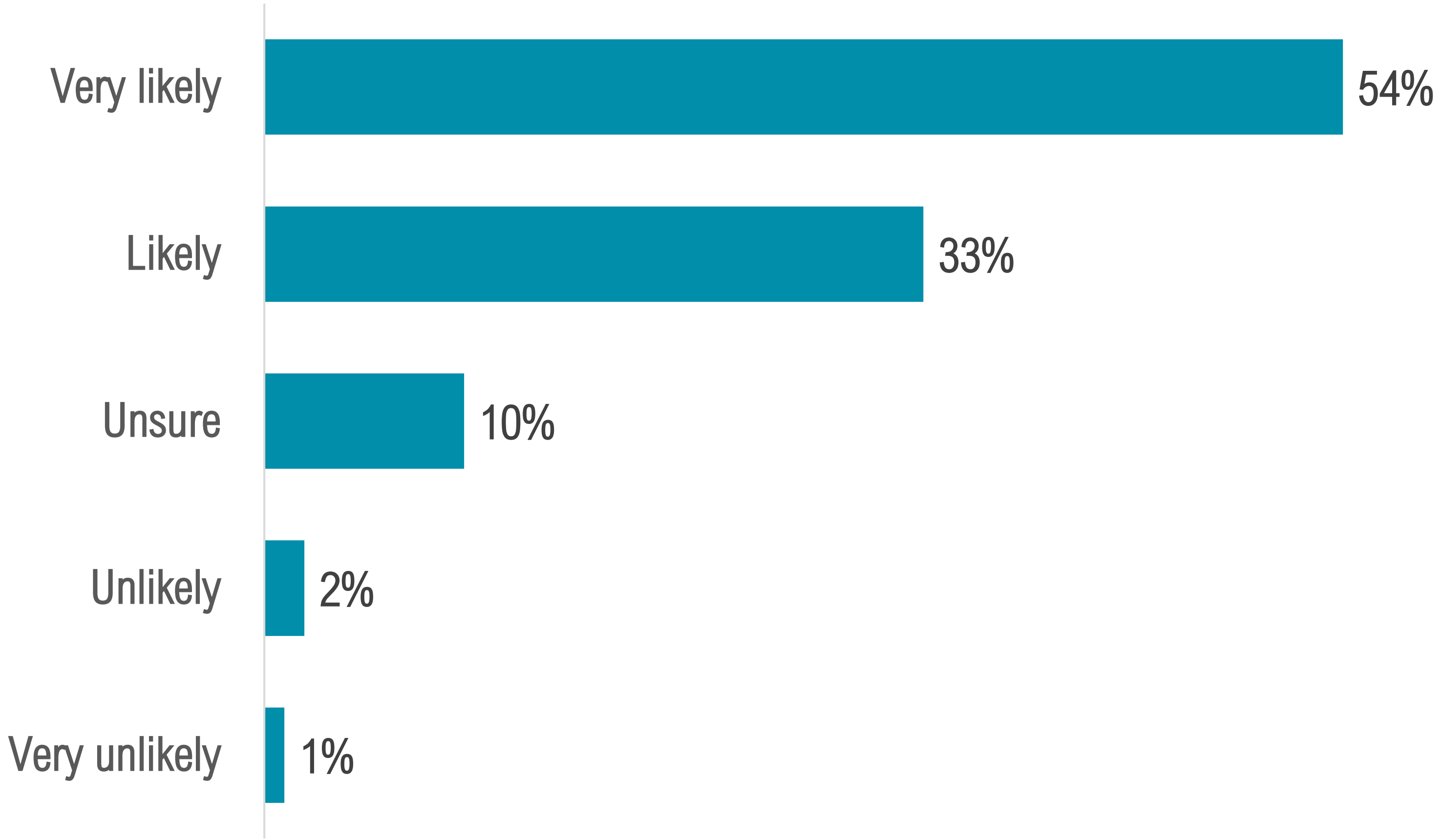
VISITOR JOURNEY: POST-TRIP EVALUATION

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

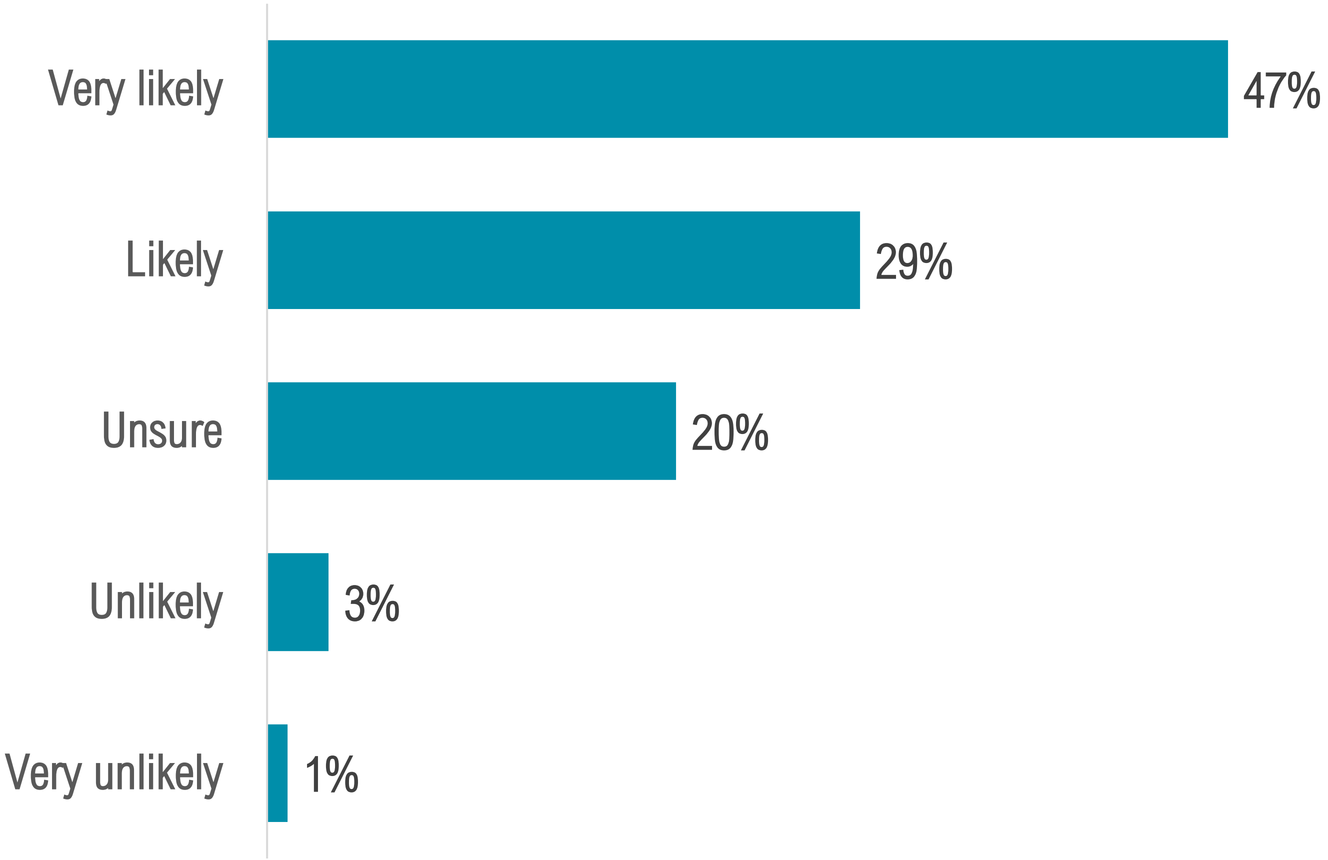
LIKELIHOOD OF RECOMMENDING THE AREA



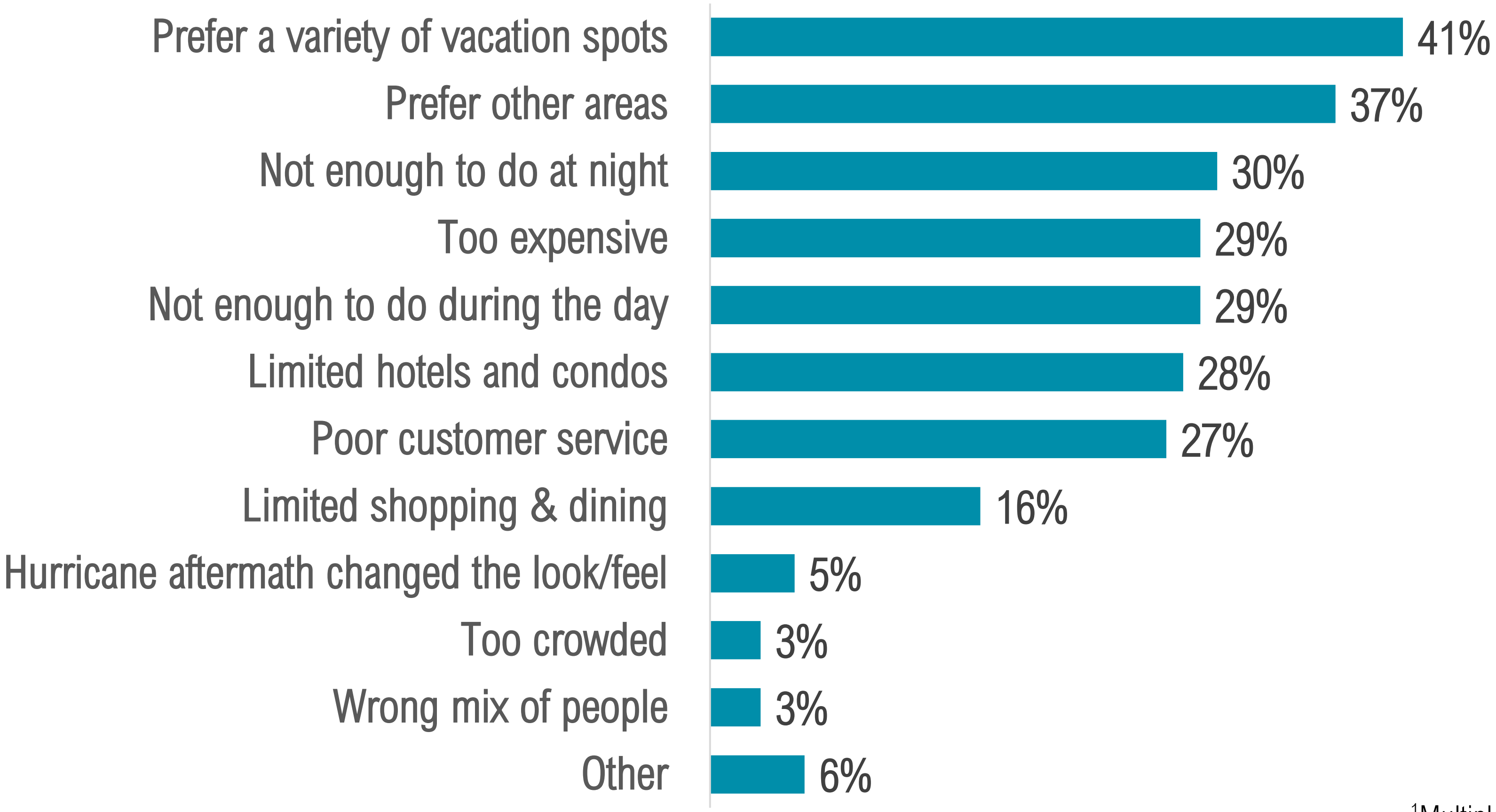
LIKELIHOOD OF RETURNING TO THE AREA



LIKELIHOOD OF RETURNING NEXT YEAR

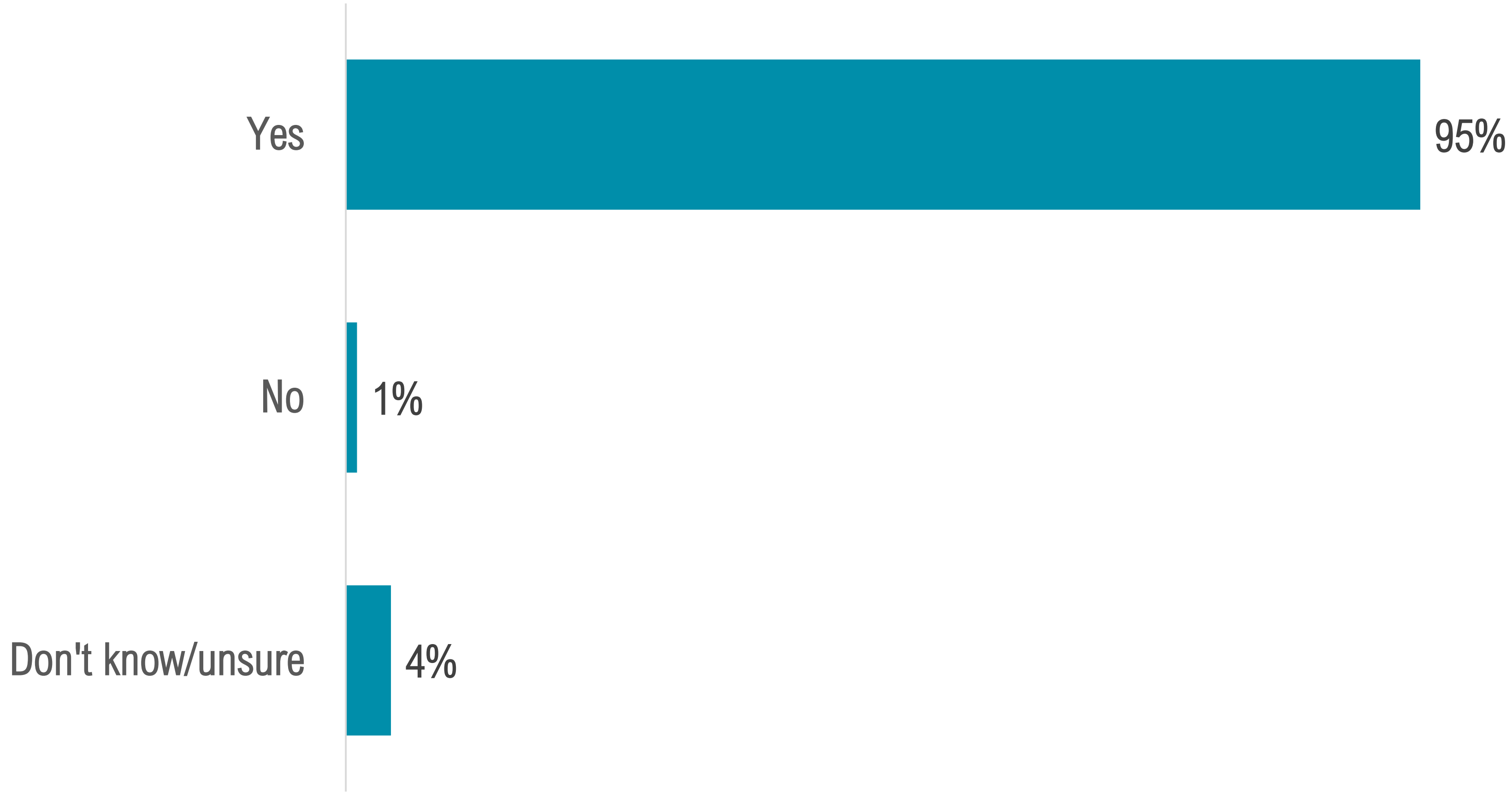


REASONS FOR NOT RETURNING[1]



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

FEELING OF WELCOMENESS



CROSSTABULATIONS: LIKELIHOOD OF RECOMMENDING[1]

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2022	2023	2022	2023	2022	2023	2022	2023
Very Likely	93%	41%	97%	60%	96%	52%	95%	66%
Likely		37%		31%		35%		21%
Unsure/don't know	6%	17%	2%	8%	3%	11%	4%	7%
Unlikely	1%	4%	1%	0%	1%	1%	1%	3%
Very Unlikely		1%		1%		1%		3%

[1]Survey response options were expanded from Yes/No/DK to a 5-point Likert scale to provide more detailed information.

CROSSTABULATIONS: LIKELIHOOD OF RETURNING[1]

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2022	2023	2022	2023	2022	2023	2022	2023
Very Likely	75%	43%	93%	51%	87%	46%	84%	64%
Likely		44%		41%		44%		28%
Unsure/don't know	16%	11%	6%	7%	9%	9%	8%	5%
Unlikely	9%	1%	1%	1%	4%	0%	8%	3%
Very Unlikely		1%		1%		1%		0%

[1]Survey response options were expanded from Yes/No/DK to a 5-point Likert scale to provide more detailed information.

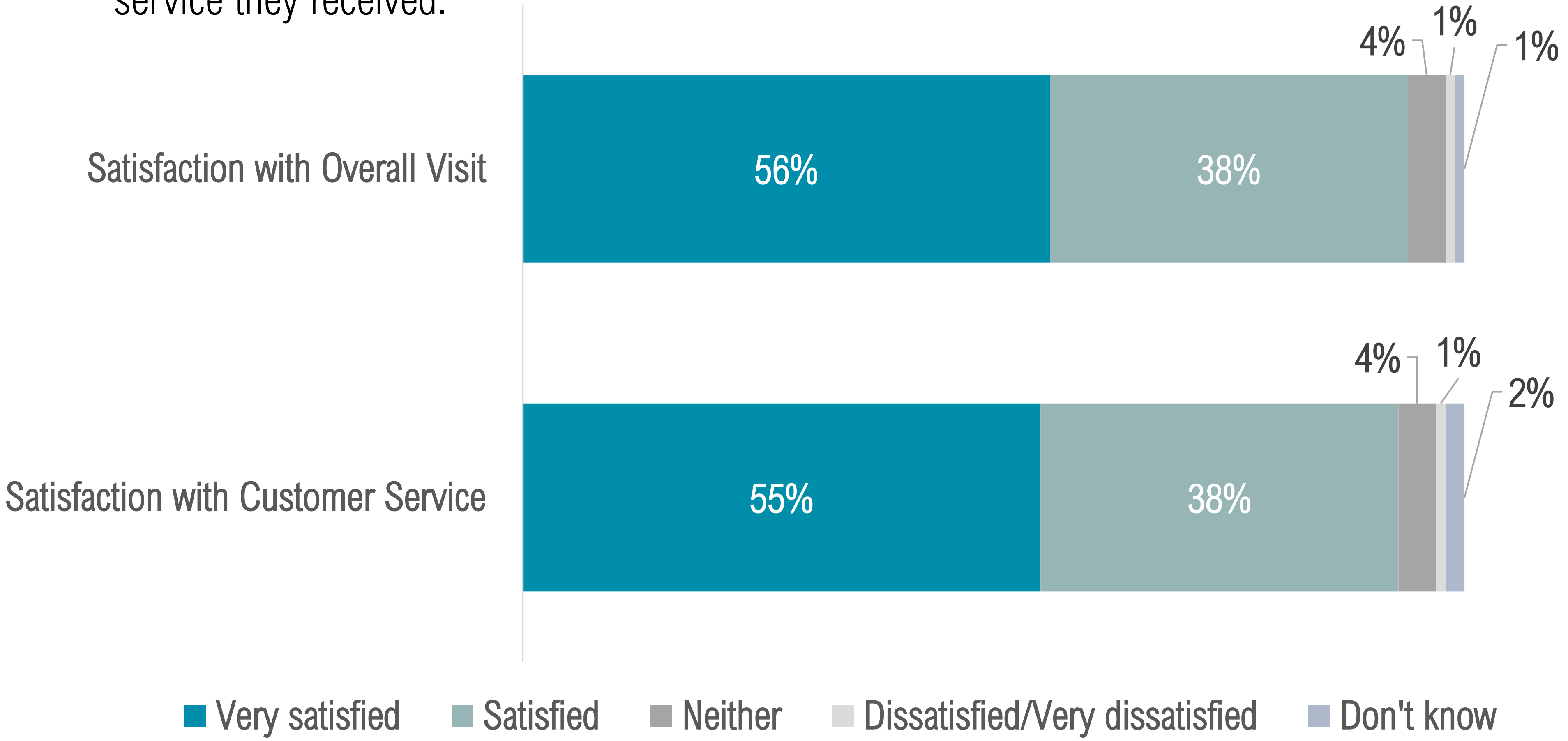
CROSSTABULATIONS: LIKELIHOOD OF RETURNING NEXT YEAR[1]

<table>
<tr><th></th><th colspan="2">First Time Visitors</th><th colspan="2">Repeat Visitors</th><th colspan="2">Domestic Visitors</th><th colspan="2">Int'l Visitors</th></tr>
<tr><th></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">32%</td><td>27%</td><td rowspan="2">72%</td><td>53%</td><td rowspan="2">59%</td><td>64%</td><td rowspan="2">51%</td><td>43%</td></tr>
<tr><td>Likely</td><td>36%</td><td>27%</td><td>16%</td><td>32%</td></tr>
<tr><td>Unsure/don't know</td><td>44%</td><td>29%</td><td>24%</td><td>17%</td><td>31%</td><td>17%</td><td>36%</td><td>21%</td></tr>
<tr><td>Unlikely</td><td rowspan="2">24%</td><td>8%</td><td rowspan="2">4%</td><td>2%</td><td rowspan="2">10%</td><td>2%</td><td rowspan="2">13%</td><td>4%</td></tr>
<tr><td>Very Unlikely</td><td>0%</td><td>1%</td><td>1%</td><td>0%</td></tr>
</table>

[1]Survey response options were expanded from Yes/No/DK to a 5-point Likert scale to provide more detailed information.

SATISFACTION

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



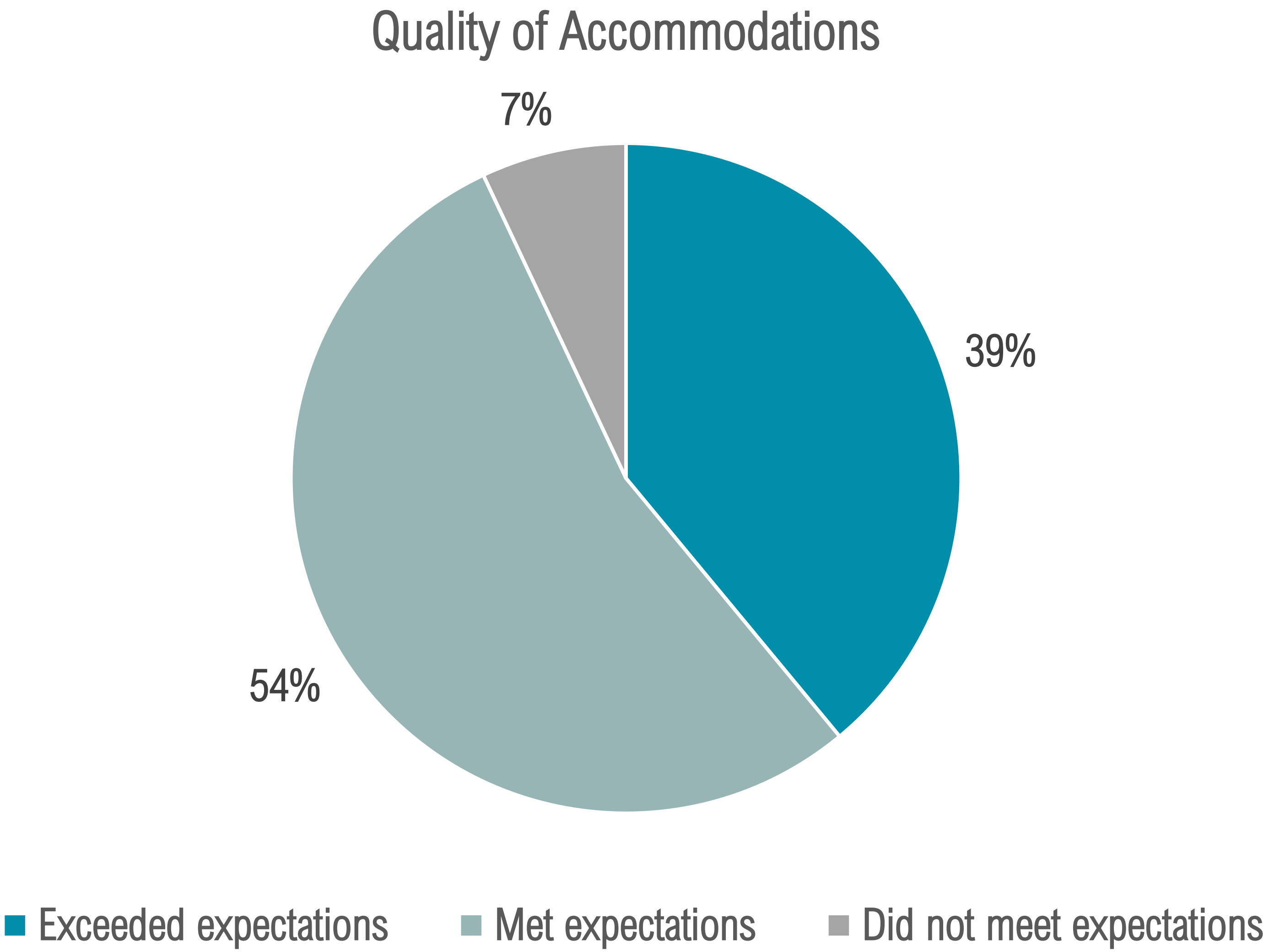
CROSSTABULATIONS: SATISFACTION WITH OVERALL VISIT

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2022	2023	2022	2023	2022	2023	2022	2023
Very Satisfied	38%	52%	66%	58%	54%	55%	70%	67%
Satisfied	58%	41%	30%	37%	43%	40%	28%	28%
Unsure/don't know	4%	5%	3%	4%	3%	5%	2%	3%
Dissatisfied	0%	2%	1%	1%	1%	1%	0%	1%
Very Dissatisfied	0%	0%	0%	1%	0%	0%	0%	2%

CROSSTABULATIONS: SATISFACTION WITH SERVICE

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2022	2023	2022	2023	2022	2023	2022	2023
Very Satisfied	44%	57%	63%	54%	55%	53%	62%	63%
Satisfied	48%	35%	31%	39%	39%	39%	33%	32%
Unsure/don't know	7%	5%	5%	6%	5%	7%	5%	3%
Dissatisfied	1%	3%	1%	1%	1%	1%	0%	1%
Very Dissatisfied	0%	0%	0%	0%	0%	0%	0%	1%

SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

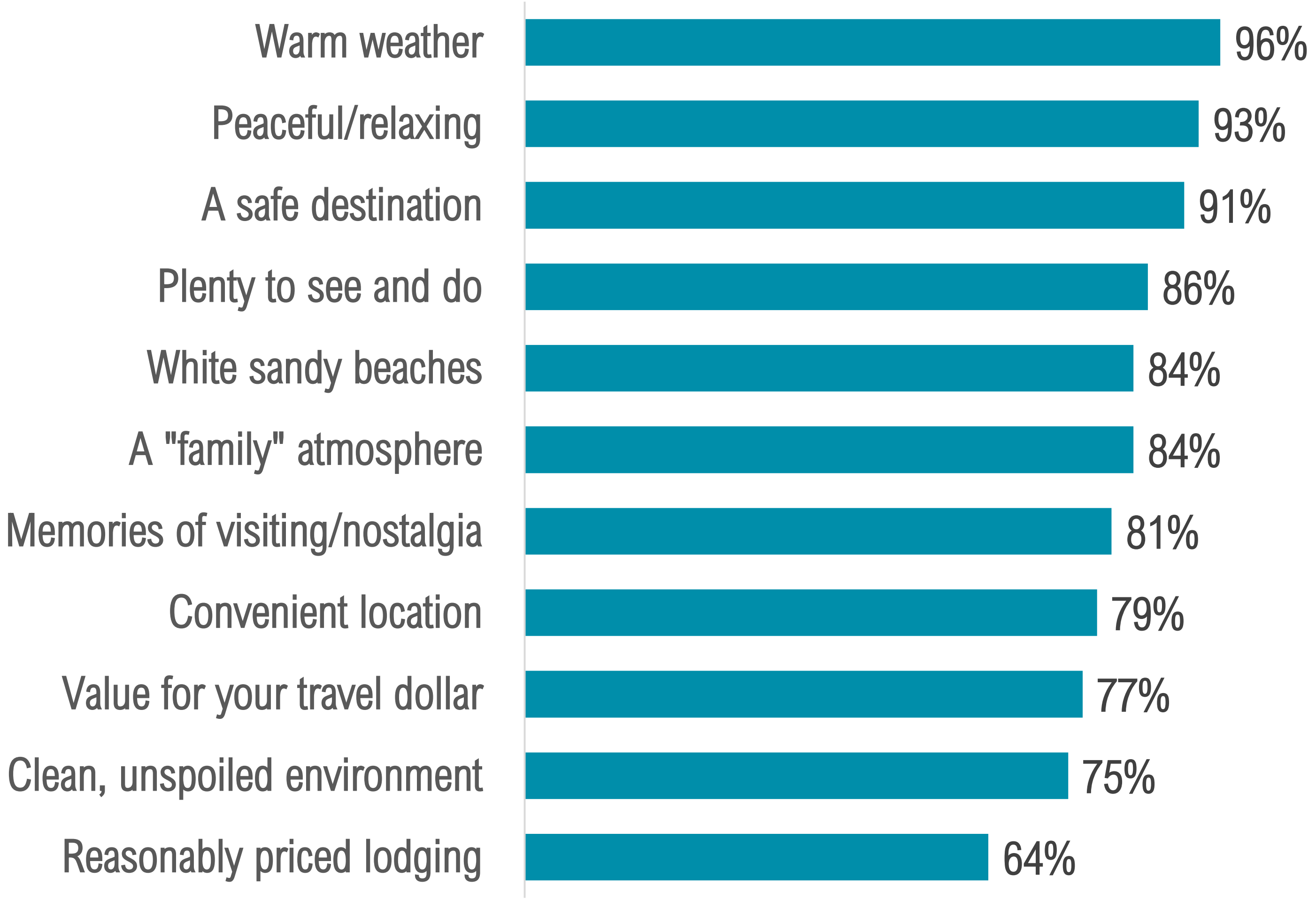


SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

	1st Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2022	2023	2022	2023	2022	2023	2022	2023
Exceeded Expectations	40%	38%	36%	40%	36%	38%	58%	46%
Met Expectations	57%	54%	60%	55%	60%	56%	41%	44%
Did Not Meet Expectations	3%	8%	5%	5%	4%	6%	1%	10%

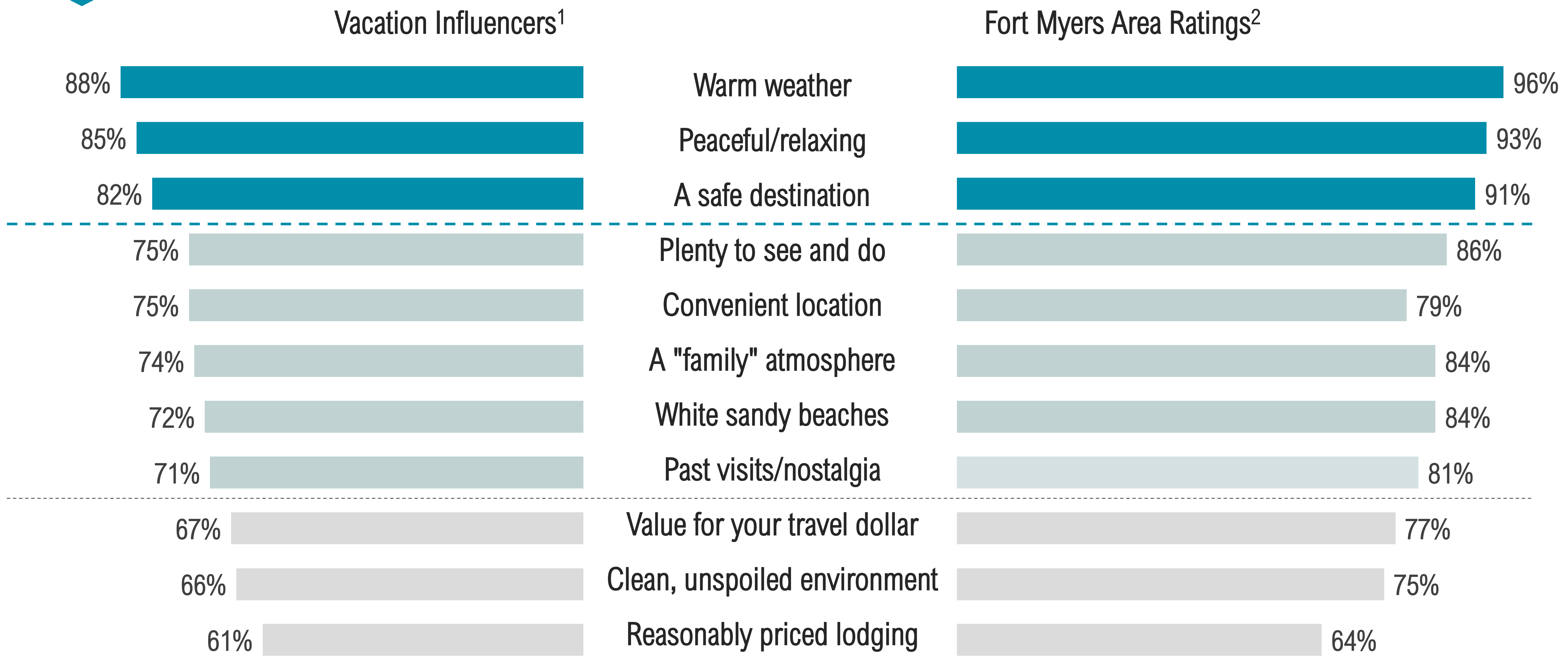
ATTRIBUTE RATINGS[1]

At least **90%** of visitors gave high attribute ratings for **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.

Post-Trip Evaluation
Apr - Jun 2023

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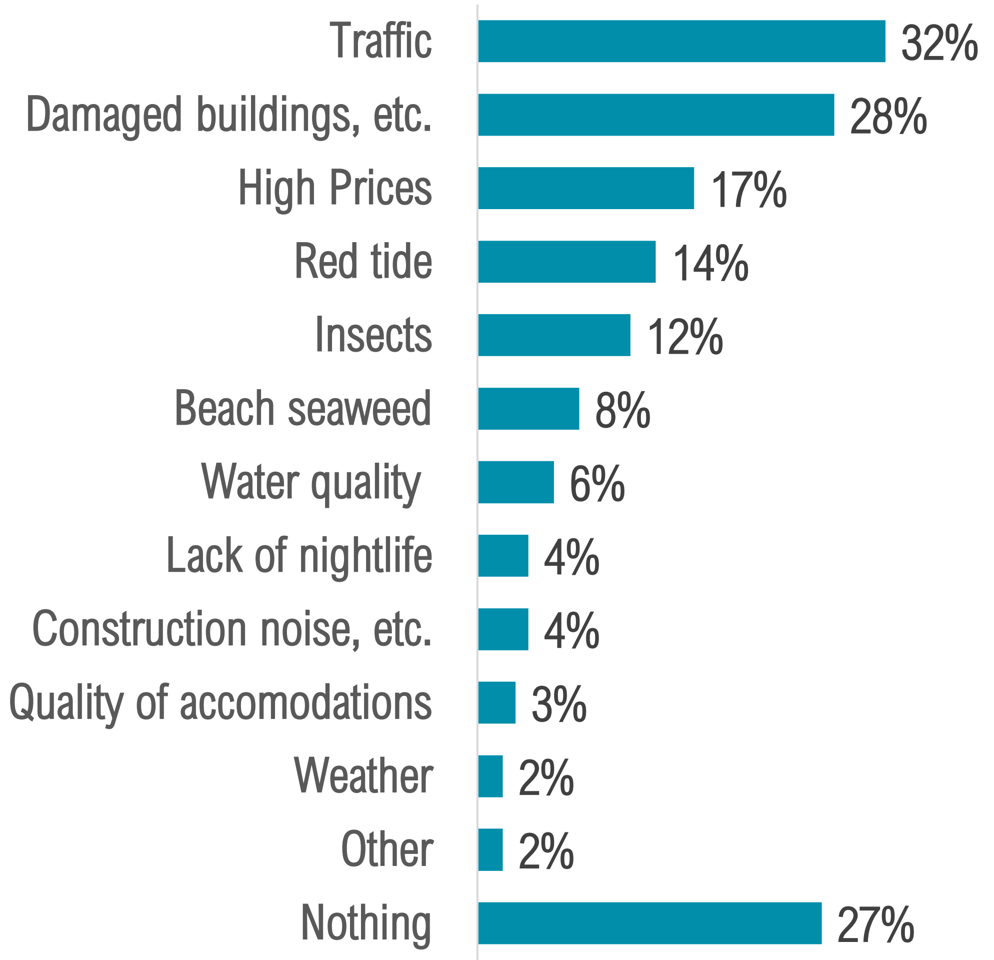
LEAST LIKED FEATURES[1]

Nearly 1 in 3 visitors were concerned about traffic, while over 1 in 4 were concerned with hurricane damage, and another 27% had no concerns at all 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

- "A terrific time visiting our relatives in a great environment and warm weather."
- "A tremendously good time with perfect weather and a beautiful environment."
- "A wonderful time and beautiful setting with the beaches, palm trees, and near perfect weather."
- "We had a wonderful time at a wedding and visiting friends and family. It's the perfect time of year with awesome weather."

Peaceful & Relaxing

- "Absolutely beautiful. White sands. Relaxing yet fun. Everyone was friendly too."
- "Awesome beaches and a very relaxing environment overall."
- "We had an awesome business meeting here and it was very relaxing, and the golf courses are super nice."
- "The beaches are peaceful and warm, the people are inviting, it's a great family-friendly getaway."

AREA DESCRIPTIONS

Safe

- "Family-oriented, clean, safe, and beautiful!"
- "It's still beautiful and safe, just a bit calmer as the community works to rebuild."
- "It's a nice quiet place for some good clean fun. Great for a family vacation."
- "I love the remoteness of some of the beautiful beach islands that you can only access via boat."

Plenty to See and Do

- "This is still our favorite vacation destination because of the great weather, and there is plenty to do, especially the great golfing options."
- "Tremendous vacation spot with so much to see and do. Whether you want to look for shells, go fishing, go kayaking, golf, shop, grab a nice meal, or just sit on the beach, there's something for everyone!"

OCCUPANCY BAROMETER[1]: JUL - SEP RESERVATIONS

Jul – Sep Reservations	Jul – Sep 2022	Jul - Sep 2023
Up	34%	32%
Same	33%	7%
Down	33%	61%

[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?”

OCCUPANCY BAROMETER[1]: OCT - DEC RESERVATIONS

Oct – Dec Reservations	Oct - Dec 2022	Oct - Dec 2023
Up	54%	50%
Same	32%	14%
Down	14%	36%

[1]Sources: Occupancy Survey
Accommodations partners were asked the following, "Please think about your reservations for the next three months. Compared to October - December 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	April - June 2022	April - June 2023	% Change '22 – '23
Visitors	1,477,100	727,200	- 50.8%
Visitor Days	8,271,760	4,450,500	- 46.2%
Room Nights	1,748,800	1,054,900	- 39.7%
Direct Expenditures[1]	$1,206,349,700	$683,376,000	- 43.4%
Total Economic Impact[2]	$1,921,715,100	$1,094,085,000	- 43.1%
Occupancy	68.4%	52.6%	- 23.0%
ADR	$190.79	$137.11	- 28.1%
RevPAR	$130.50	$72.18	- 44.7%

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

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM[1]

	April - June 2022	April - June 2023	% Change '22 – '23
Direct Jobs[2]	15,600	8,700	-44.2%
Total Jobs[3]	21,500	11,400	-47.0%
Direct Wages[2]	$355,358,800	$247,541,300	-30.3%
Total Wages[3]	$584,682,900	$349,202,400	-40.3%
Direct Local Taxes[2]	$37,155,500	$17,893,100	-51.8%
Total Local Taxes[3]	$63,993,100	$23,509,700	-63.3%
Direct State Taxes[2]	$86,012,700	$32,551,800	-62.2%
Total State Taxes[3]	$125,295,800	$43,028,300	-65.7%

[1] Calculated using IMPLAN, an economic impact analysis software.
[2] Only accounts for the money spent directly by visitors in categories such as accommodations, restaurants, entertainment, shopping, transportation, groceries, and "other" expenses.
[3] Accounts for direct spending as well as the indirect and induced effects of visitor spending. In other words, it considers the "Total Economic Impact". As a reminder, indirect effects include increased business spending resulting from tourism dollars, while induced effects include increased household spending resulting from tourism dollars.

VISITOR TYPE

Visitor Type	April - June 2022	April - June 2023
Visitors in Paid Accommodations	73%	68%
Visitors in Non-Paid Accommodations	24%	30%
Day Trippers	3%	2%

PRE-VISIT

Planned trip in advance	April - June 2022	April - June 2023
1 week or less	6%	6%
2-4 weeks	16%	14%
1-2 months	31%	32%
3-6 months	28%	31%
6 months or more	18%	17%
Not sure	1%	0%

Considered Other Destinations	April - June 2022	April - June 2023
Yes	29%	29%
No	71%	71%

PRE-VISIT

Other destinations considered[1]	April - June 2022[2]	April - June 2023[2]
Sarasota/Siesta Key	11%	20%
Tampa/Clearwater/St. Pete	13%	18%
Naples/Marco Island	9%	15%
Keys/Key West	6%	13%
Orlando	9%	12%
Daytona Beach	4%	10%
West Palm Beach	4%	9%
Miami/Ft. Lauderdale	5%	6%
Punta Gorda/Englewood	1%	2%
Other destinations in FL	15%	10%
Other destinations outside of FL	23%	21%

[1]Multiple responses permitted.
[2]Base: 29% of visitors who considered other destinations.

PRE-VISIT

Trip Planning Websites/Apps[1]	April - June 2022	April - June 2023
Airline websites/apps	24%	30%
Online search engines	31%	29%
Airbnb, VRBO, HomeAway etc.	25%	22%
Vacation rental websites/apps	22%	16%
Booking websites	20%	15%
Hotel websites/apps	17%	14%
Trip Advisor	14%	13%
Traveler reviews, blogs, stories	18%	11%
VCB Facebook Page	13%	9%
Visit Florida	11%	8%
www.VisitFortMyers.com	12%	8%
Facebook	8%	7%
Instagram	4%	4%
YouTube, Hulu, Pandora	4%	4%
None	18%	22%
Other	4%	2%

[1]Multiple responses permitted.

PRE-VISIT

Information Requests[1]	April - June 2022	April - June 2023
Calling the VCB	27%	23%
Calling a hotel, motel, condo	12%	8%
Requesting and receiving a visitor guide	4%	3%
Receiving the VCB e-newsletter	4%	2%
Calling a local Chamber of Commerce	2%	1%
Other	2%	2%
None	63%	70%

[1]Multiple responses permitted.

PRE-VISIT

Recall of Lee County Promotions	April - June 2022	April - June 2023
Yes	45%	42%
No	41%	40%
Can't recall	14%	18%
% of recallers influenced by promotions	53%	50%
% of total visitors influenced by promotions	24%	21%

PRE-VISIT

Type of Promotions Recalled[1]	April - June 2022[2]	April - June 2023[3]
Internet	42%	48%
Social media	35%	33%
Traveler reviews, blogs	23%	17%
Television	14%	16%
Newspaper	7%	10%
Magazine	9%	9%
www.VisitFortMyers.com	12%	9%
Email/e-newsletter	-	9%
Travel/visitor guide	13%	8%
Brochure	7%	6%
AAA	6%	6%
Video streaming services	-	6%
Radio	5%	4%
Billboard	3%	3%
Deal-based promotion	4%	2%
Music streaming services	-	<1%
Podcasts	-	<1%
Other	3%	2%

[1]Multiple responses permitted.
[2]Base: 45% of visitors who recalled seeing a promotion.
[3]Base: 42% of visitors who recalled seeing a promotion.

PRE-VISIT

Characteristics influencing decision to visit Lee County (top 2 boxes)[1]	April - June 2022	April - June 2023
Warm weather	93%	88%
Peaceful/relaxing	94%	85%
A safe destination	91%	82%
Plenty to see and do	84%	75%
Convenient location	81%	75%
A "family" atmosphere	82%	74%
White sandy beaches	90%	72%
Memories of past visits/nostalgia	-	71%
Value for your travel dollar	78%	67%
Clean, unspoiled environment	87%	66%
Reasonably priced lodging	78%	61%

[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]	April - June 2022	April - June 2023
Relax & unwind	39%	39%
Beach	56%	33%
Visiting friends & relatives	18%	30%
Special occasion	6%	10%
Fishing	6%	9%
Checking on my property	-	9%
Shopping	5%	7%
Nature, environment, bird watching	8%	6%
Attractions	2%	5%
Business meetings/conferences	3%	5%
Golf or tennis	4%	5%
Work-related Hurricane Recovery	-	5%
Sporting event	2%	4%
Water sports	6%	4%
Special event	2%	3%
Museums, history	2%	3%
Biking, hiking	5%	2%
Culture	2%	2%
Diving, snorkeling	1%	2%
Photography	3%	2%
Volunteering	1%	2%
Part-time resident ("Snowbird")	-	2%
Guided tours	1%	1%
Other	5%	5%

[1]Multiple responses permitted.

PRE-VISIT

Transportation	April - June 2022	April - June 2023
Fly	66%	67%
Drive a personal vehicle	31%	27%
Drive a rental vehicle	2%	5%
Drive a RV	1%	1%
Travel by bus	<1%	<1%
Other	<1%	<1%

Airport Used	April - June 2022	April - June 2023
Southwest Florida International	84%	85%
Punta Gorda	6%	7%
Miami International	2%	2%
Ft. Lauderdale International	4%	2%
Orlando International	2%	2%
Tampa International	1%	1%
Other	1%	1%

TRAVEL PARTY PROFILE

Visitor Origin[1]	April - June 2022	April - June 2023
Florida	7.5%	6.1%
Southeast	20.3%	18.5%
Northeast	20.2%	19.4%
Midwest	35.5%	34.1%
West	8.4%	7.7%
Canada	4.5%	8.5%
United Kingdom	0.7%	1.0%
Germany	0.9%	2.3%
Other Europe	1.0%	0.7%
Other International	1.0%	1.7%

Visitor Origin[1]	April - June 2022	April - June 2023
New York	5%	5%
Atlanta	3%	4%
Chicago	3%	4%
Washington, D.C. - Hagerstown	1%	3%
Boston	4%	3%
Minneapolis - Saint Paul	3%	3%
Detroit	2%	3%

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

TRAVEL PARTY PROFILE

Travel Parties	April - June 2022	April - June 2023
Mean travel party size[1]	3.2	2.8
Travel with children under age 18	41%	35%

Travel Party Composition	April - June 2022	April - June 2023
As a family	44%	42%
As a couple	34%	34%
With other couples/friends	11%	10%
By yourself	8%	9%
With business associates	1%	3%
In a tour group	1%	1%
Other	1%	1%

[1]Sources: Occupancy Study and Visitor Tracking Study

TRAVEL PARTY PROFILE

Marital Status	April - June 2022	April - June 2023
Married/Domestic Partnership	73%	74%
Single	27%	26%

Age	April - June 2022	April - June 2023
Average age	50	51
Median age	49	50

Household Income	April - June 2022	April - June 2023
Median Income	$108,300	$107,600

TRAVEL PARTY PROFILE

Race/Ethnicity	April - June 2022	April - June 2023
Caucasian/White	79%	79%
Hispanic/Latino/Latina/Latinx	10%	11%
African American/Black	5%	4%
Asian/Asian American/Pacific Islander	3%	2%
Middle Eastern/Northern African	-	1%
Another race/ethnicity	3%	3%

Gender	April - June 2022	April - June 2023
Female	48%	52%
Male	52%	47%
Non-binary	<1%	1%

TRIP EXPERIENCE

Length of Stay[1]	April - June 2022	April - June 2023
Average nights in the Fort Myers area	5.6	6.1

First Time/Repeat Visitors	April - June 2022	April - June 2023
First-time	36%	30%
Repeat	64%	70%

[1]Sources: Occupancy Study & Visitor Tracking Survey.

TRIP EXPERIENCE

Type of Accommodations	April - June 2022	April - June 2023
Hotel/motel/resort	32%	34%
Vacation rental home	39%	29%
Personal second home, etc.	13%	15%
Friends/family home	11%	15%
Bed & Breakfast/Inn	<1%	2%
Campground/RV Park	2%	2%
Other	<1%	1%
Not spending the night	3%	2%

TRIP EXPERIENCE

Activities[1]	April - June 2022	April - June 2023
Restaurants	54%	65%
Relax and unwind	71%	58%
Beach	77%	54%
Visit friends/relatives	31%	43%
Shopping	41%	41%
Nature, environment, bird watching	28%	23%
Fishing	23%	21%
Water sports	27%	16%
Bars, nightclubs	17%	15%
Attractions	13%	14%
Golf or tennis	11%	14%
Biking, hiking	28%	13%
Special occasion	5%	10%
Attend or participate in a sporting event	4%	8%
Museums, history	10%	7%
Guided tours	7%	7%
Photography	16%	7%
Special events	5%	6%
Culture	8%	6%
Volunteering	1%	6%
Business meetings/conferences	3%	5%
Diving, snorkeling	7%	5%
Spas	4%	4%
Other	2%	1%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Attractions[1]	April - June 2022	April - June 2023
Beaches	79%	54%
Bell Tower Shops	12%	21%
Edison & Ford Winter Estates	16%	19%
Gulf Coast Town Center	10%	19%
Coconut Point Mall	11%	15%
Miromar Outlets Mall	13%	14%
Shell Factory and Nature Park	14%	12%
Sanibel Lighthouse	31%	12%
Fort Myers Beach Pier[2]	43%	11%
J.N. Ding Darling National Wildlife Refuge	16%	7%
Bailey-Matthews Shell Museum	7%	5%
Manatee Park	5%	4%
Barbara B. Mann Performing Arts Hall	2%	2%
Broadway Palm Dinner Theater	3%	2%
Periwinkle Place[3]	16%	0%
Sanibel Outlets[3]	20%	0%
Other	5%	2%
None	7%	16%

[1]Multiple responses permitted.
[2]Represents visitors who spent time on the beach area near where the pier was.
[3]Closed until further notice due to Hurricane Ian.

TRIP EXPERIENCE

Area stayed	April - June 2022	April - June 2023
Fort Myers	20%	36%
Cape Coral	13%	24%
Bonita Springs	6%	9%
Fort Myers Beach	21%	6%
Estero	4%	5%
Captiva Island	3%	5%
Sanibel Island	25%	4%
North Fort Myers	2%	3%
Along I-75	1%	2%
Lehigh Acres	1%	2%
Pine Island	1%	1%
Boca Grande/Outer Islands	<1%	1%
None/not staying overnight	3%	2%

POST-TRIP EVALUATION

Likelihood of Recommending the Area	April - June 2022	April - June 2023
Very Likely	95%	49%
Likely		41%
Unsure/don't know	3%	8%
Unlikely	2%	1%
Very Unlikely		1%

Likelihood of Returning to the Area	April - June 2022	April - June 2023
Very Likely	87%	54%
Likely		33%
Unsure/don't know	10%	10%
Unlikely	3%	2%
Very Unlikely		1%

Likelihood of Returning Next Year	April - June 2022	April - June 2023
Very Likely	59%	47%
Likely		29%
Unsure/don't know	32%	20%
Unlikely	9%	3%
Very Unlikely		1%

POST-TRIP EVALUATION

Satisfaction with Accommodations	April - June 2022	April - June 2023
Exceeded expectations	40%	39%
Met expectations	57%	54%
Did not meet expectations	3%	7%

Felt Welcomed in the Fort Myers Area	April - June 2022	April - June 2023
Yes	94%	95%

POST-TRIP EVALUATION

Satisfaction with Visit	April - June 2022	April - June 2023
Very satisfied	62%	56%
Satisfied	35%	38%
Neither	2%	4%
Dissatisfied	1%	1%
Very dissatisfied	0%	0%
Don't know/no opinion	0%	1%

Satisfaction with Customer Service	April - June 2022	April - June 2023
Very satisfied	59%	55%
Satisfied	34%	38%
Somewhat satisfied	5%	4%
Dissatisfied	1%	1%
Very dissatisfied	0%	0%
Don't know/no opinion	1%	2%

POST-TRIP EVALUATION

Visitor Concerns[1]	April - June 2022	April - June 2023
Traffic	36%	32%
Damaged buildings, landscapes, etc.	-	28%
High prices	19%	17%
Red tide	6%	14%
Insects	17%	12%
Beach seaweed	20%	8%
Water quality	10%	6%
Lack of nightlife	7%	4%
Construction noise, activity, etc.	-	4%
Quality of accommodations	5%	3%
Weather	9%	2%
Other	6%	2%
Nothing	25%	27%

[1]Multiple responses permitted.

Methodology

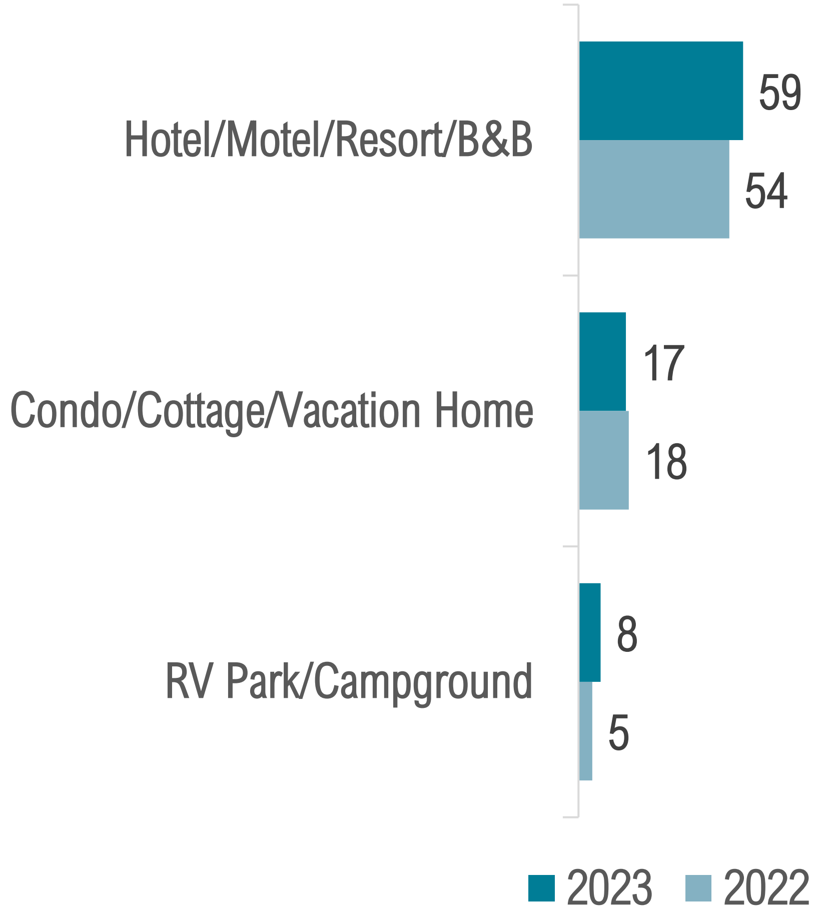
METHODOLOGY

- 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: 873 completed interviews
    - Target individuals: April - June visitors to Lee County
    - Data Collection: April - June 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 6,528 hotel/rental/campground units (84 properties) reporting to DSG, 8,416 hotel units reporting to STR (69 properties), and 2,739 rental units (26 properties) reporting to KeyData
  - IMPLAN Economic Impact Modeling software
    - IMPLAN models the way tourism dollars are spent and re-spent in other sectors of the economy, generating waves of economic activity, called multiplier effects. The model uses national industry data and county-level economic data to generate a series of multipliers, which in turn estimate the total economic implications of economic activity.
    - Over 1,500 organizations use IMPLAN, including FEMA, EPA, Federal Reserve Bank, and Bureau of Land Management.
  - 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 – 84 completed interviews
    - Data Collection: Completed in April
      - (for April - June 2023)
  - Total Sample Size – data from 6,528 hotel/rental/campground units reporting to DSG, 8,416 hotel units reporting to STR (representing 69 properties), and 2,739 rental units reporting to KeyData (representing 26 properties)

Number of Interviews



Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

April - June 2023

Visitor Tracking, Occupancy, & Economic Impact Study

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