

The Beaches of Fort Myers & Sanibel

Lee County VCB

April – June 2020

Visitor Tracking, Occupancy & Economic Impact Study

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Introduction



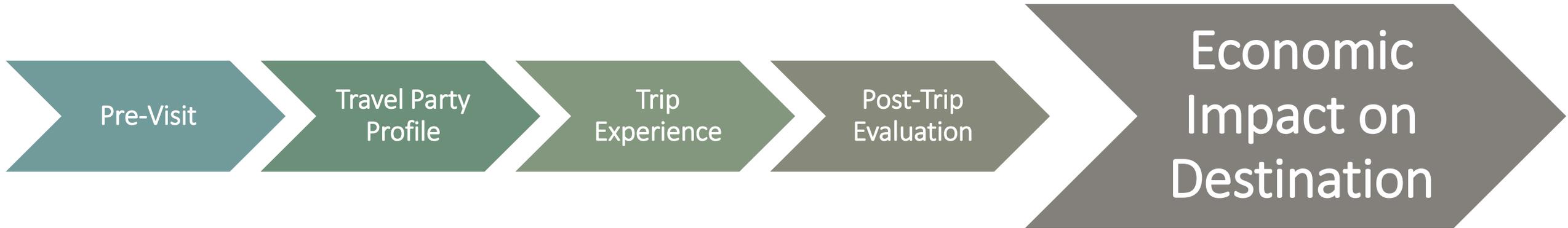
Study Objectives: Map the Visitor Journey



Executive Summary



Visitor Journey: Economic Impact on Destination



Tourism Snapshot: Apr - June 2020¹

Visitor & Lodging Statistics	Apr - June 2019	Apr - June 2020	% Change
Visitors	1,262,500	450,200	-64.3%
Room Nights	1,309,000	646,700	-50.6%
Direct Expenditures ²	\$727,686,800	\$404,396,500	-44.4%
Total Economic Impact ³	\$1,181,763,400	\$656,739,900	-44.4%

¹Decreases in KPIs from 2019 to 2020 were due to COVID-19.

²Includes: accommodations, restaurants, entertainment, shopping, transportation, groceries, and “other” expenses.

³Economic 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: Calendar Year-to-Date 2020¹

Visitor & Lodging Statistics	CYTD 2019	CYTD 2020	% Change
Visitors	2,574,400	1,541,500	-40.1%
Room Nights	3,157,200	2,246,000	-28.9%
Direct Expenditures ²	\$1,979,515,400	\$1,487,181,700	-24.9%
Total Economic Impact ³	\$3,214,733,000	\$2,415,183,100	-24.9%

¹Decreases in KPIs from 2019 to 2020 were due to COVID-19.

²Includes: accommodations, restaurants, entertainment, shopping, transportation, groceries, and “other” expenses.

³ Economic impact includes indirect and induced effects of visitor spending. Indirect effects are increased business spending resulting from tourism dollars. Induced effects are increased household spending resulting from tourism dollars.

Apr – June Lodging Statistics

36.6%

Occupancy

↓ 42.5%

\$116.73

ADR

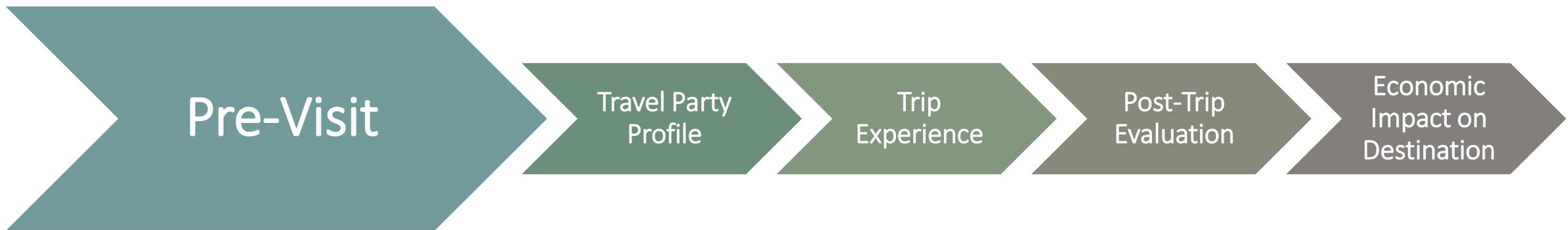
↓ 10.6%

\$42.72

RevPAR

↓ 48.5

Visitor Journey: Pre-Visit



Trip Planning

- Over **half** of visitors planned their trip to The Beaches of Fort Myers & Sanibel at least 3 months in advance
- **1 in 3** visitors requested information from hotels, the VCB, etc., to plan their trip
- **19%** of visitors considered choosing other destinations when planning their trips



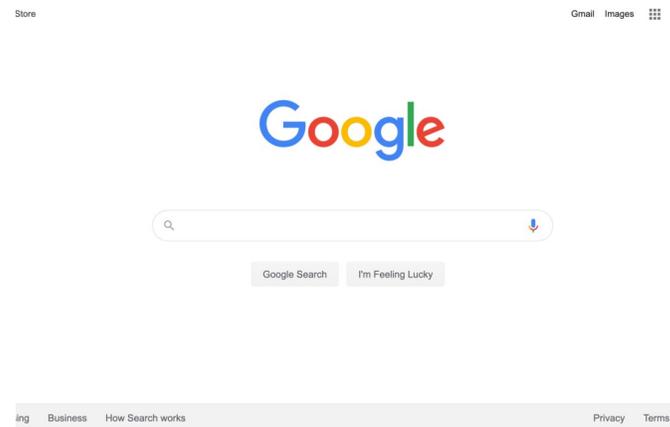
Trip Planning: Websites Used

→ **8 in 10** visitors used websites to plan their trip to The Beaches of Fort Myers & Sanibel

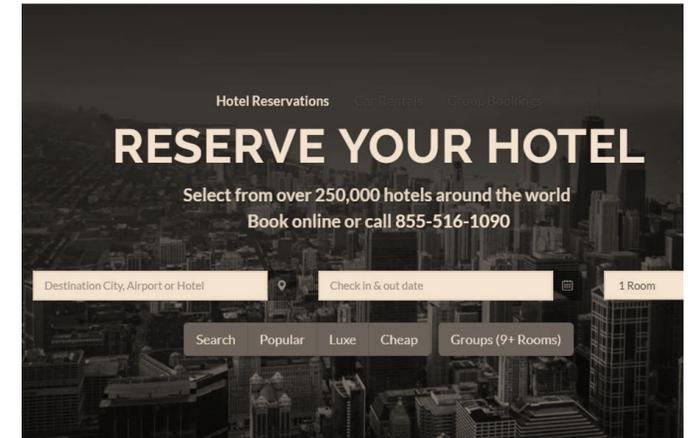
→ Top websites used to plan their trip include¹:



23% Airline websites/apps



23% Search engines



19% Hotel websites/apps

¹Multiple responses permitted.

Top Trip Influencers

→ Visitors were heavily influenced by the following when choosing where to vacation¹:



89% Peaceful/relaxing



87% Warm weather



86% Safe destination

¹Top 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 Beaches of Fort Myers & Sanibel include¹:



52% Vacation



50% Beach



44% Relax & unwind



25% Visit friends & relatives

¹Three responses permitted.

Promotions

→ **38%** of visitors recalled promotions in the past 6 months for The Beaches of Fort Myers & Sanibel

→ Top sources of recall include¹:



29% TV



29% Social media



28% Internet

¹Multiple responses permitted.

Booking

→ Visitors used the following to book their trips:



43% Directly with hotel



16% Other online travel agency



15% VRBO, HomeAway



11% Airbnb



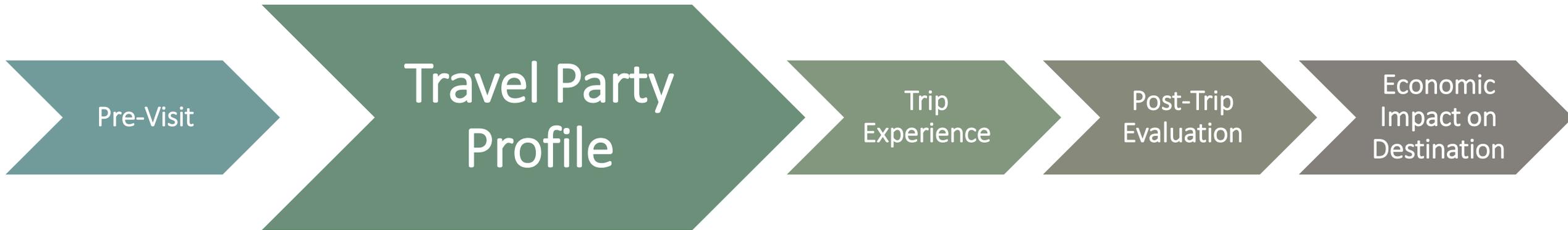
9% Vacation rental company

Transportation

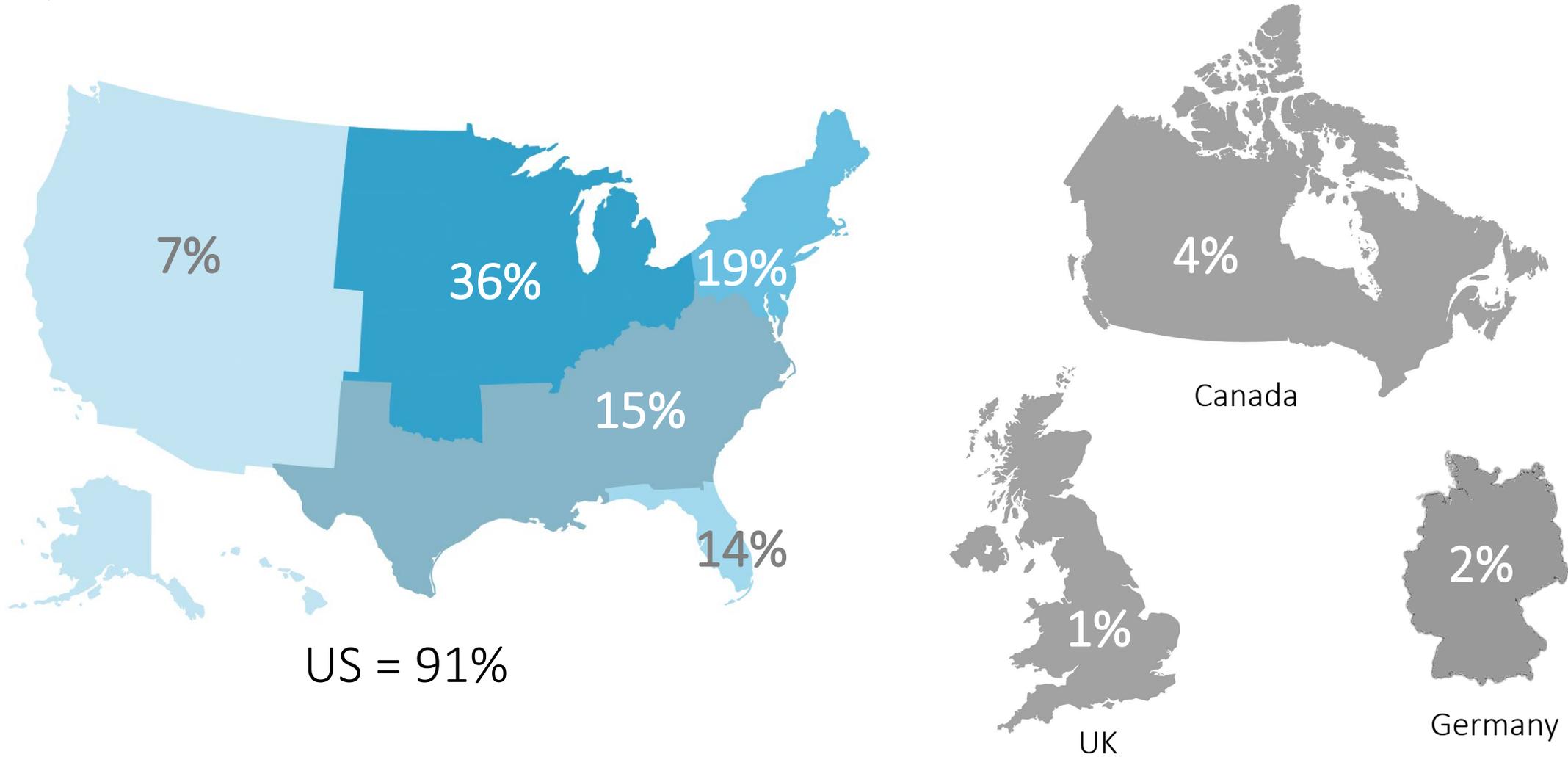


- **61%** of visitors flew to The Beaches of Fort Myers & Sanibel
- **77%** of visitors who flew to The Beaches of Fort Myers & Sanibel flew to RSW

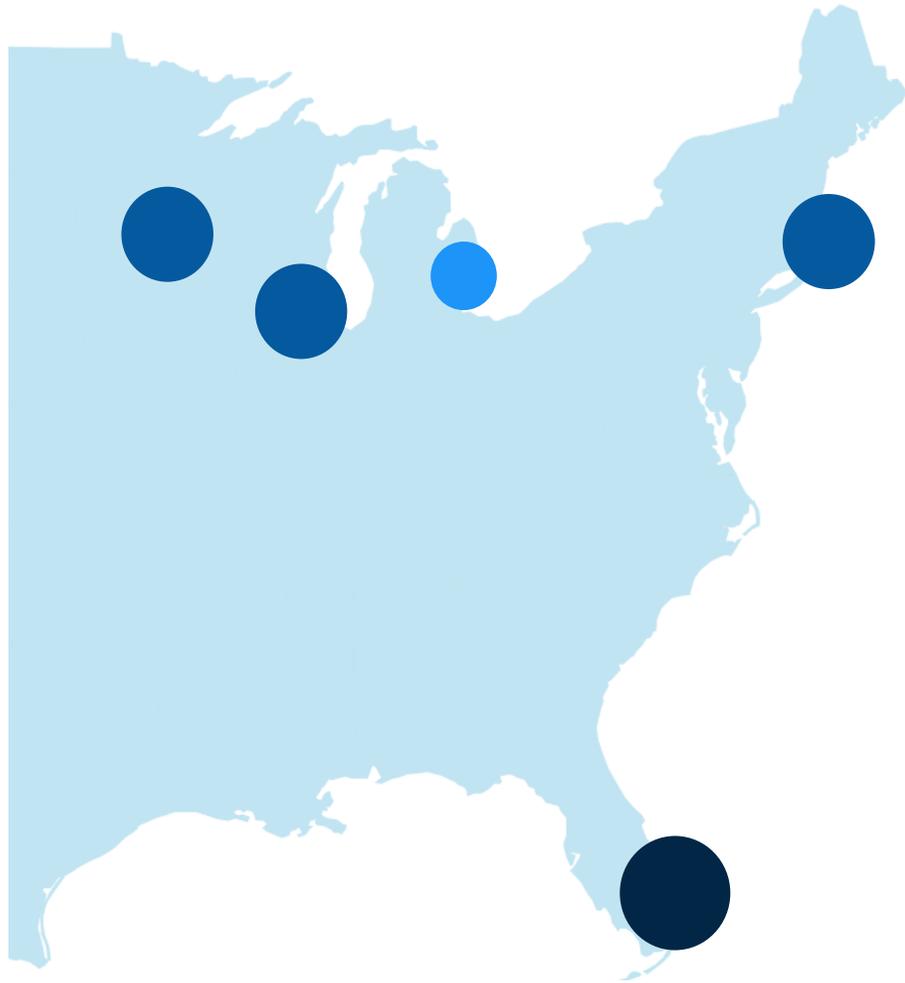
Visitor Journey: Travel Party Profile



Origin



Top Origin Markets



- 6% ● Miami – Ft. Lauderdale
- 4% ● Minneapolis – St. Paul
- 4% ● Chicago
- 4% ● New York
- 3% ● Detroit

Travel Party Size and Composition

- Visitors traveled in a party composed of **3.6 people**¹
- **30%** traveled with children under the age of 18
- **38%** traveled as a couple, and another **38%** of visitors traveled as a family



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

Demographic Profile

April – June Visitors:

- Average age of **49 years old**
- Median household income of **\$97,200**
- Married (**72%**)
- College educated (**59%**)
- Caucasian/white (**80%**)
- Female (**56%**)

Visitor Journey: Trip Experience



Accommodations



36% Hotel/Motel/Resort/B&B



30% Non-paid Accommodations



27% Condo/vacation rental



4% Day trippers



3% RV Park/Campground

Length of Stay & Number of Times in Destination

- Visitors¹ spent **7.8 nights** in The Beaches of Fort Myers & Sanibel
- **26%** were first time visitors
- **25%** have visited more than 10 times



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

Visitor Activities

→ Top visitor activities include¹:



68% Beaches



67% Relax & unwind

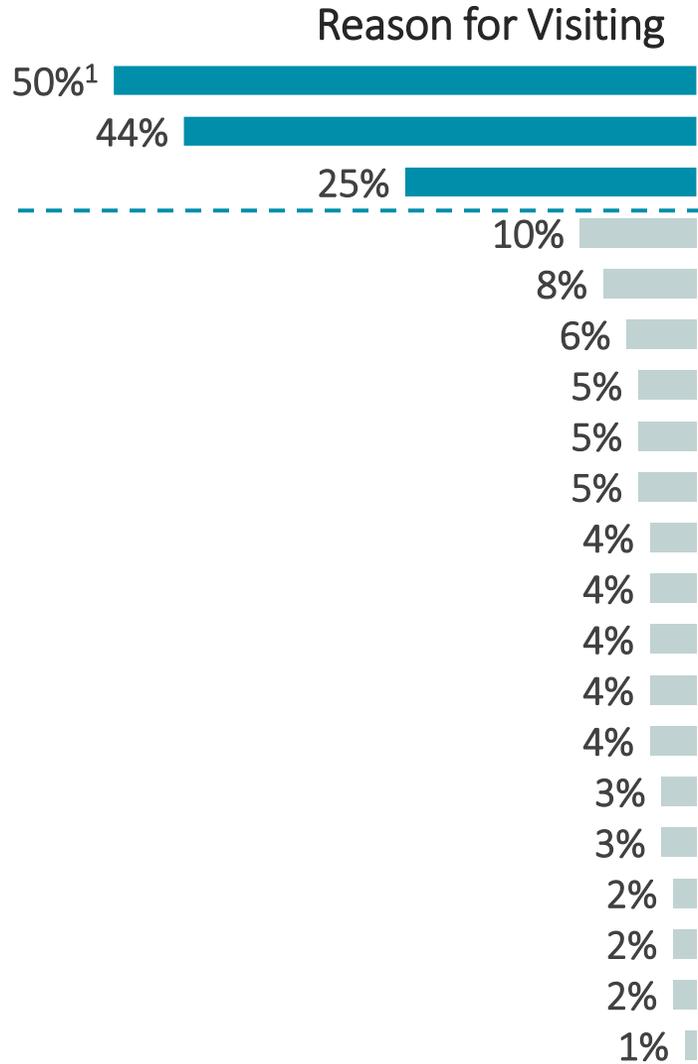


56% Dining

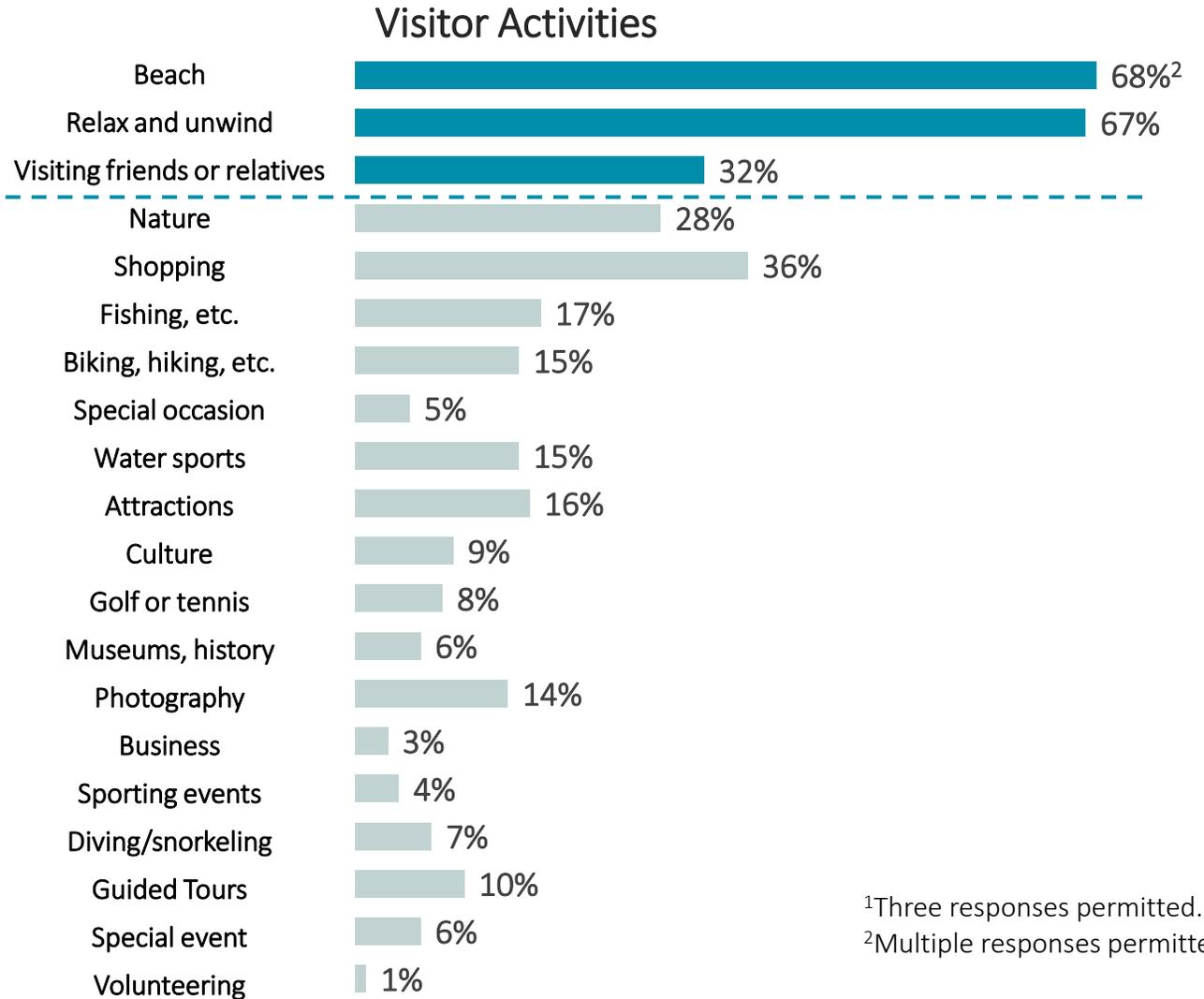
¹Multiple responses permitted.

Reason for Visiting vs. Visitor Activities

Key Reasons for Visiting



Trip Enhancements



¹Three responses permitted.
²Multiple responses permitted.

Top Attractions Visited¹



69% Beaches



35% Fort Myers Beach Pier



29% Sanibel Lighthouse



20% Sanibel Outlets



17% Edison & Ford Winter Estates



15% Miromar Outlets

¹Multiple responses permitted.

Top Communities Stayed



25% Sanibel Island



19% Fort Myers



19% Fort Myers Beach



17% Cape Coral

Visitor Journey: Post-Trip Evaluation



Satisfaction



- **92%** of visitors are likely to recommend The Beaches of Fort Myers & Sanibel
- **94%** of visitors are likely to return
- **70%** of visitors are likely to return next year
- **41%** of visitors said paid accommodations exceeded their expectations

Satisfaction



- **96%** of visitors were satisfied or very satisfied with their overall visit to The Beaches of Fort Myers & Sanibel
- **91%** of visitors were satisfied or very satisfied with customer service on their visit

Top Attribute Ratings

→ Visitors gave the highest ratings to the following destination attributes¹:



98% Warm weather



96% Peaceful/relaxing



95% A safe destination

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

Visitor Concerns

- **1 in 3** visitors was concerned about traffic in The Beaches of Fort Myers & Sanibel
- **1 in 4** were concerned about insects
- **27%** of visitors had no concerns about the destination



Area Descriptions

“The beaches of Sanibel this year are beautiful and very clean. It's so clear you can see your toes in the water. We liked it so much we reserved to come back before the summer is over.”

**Beautiful
Beaches**

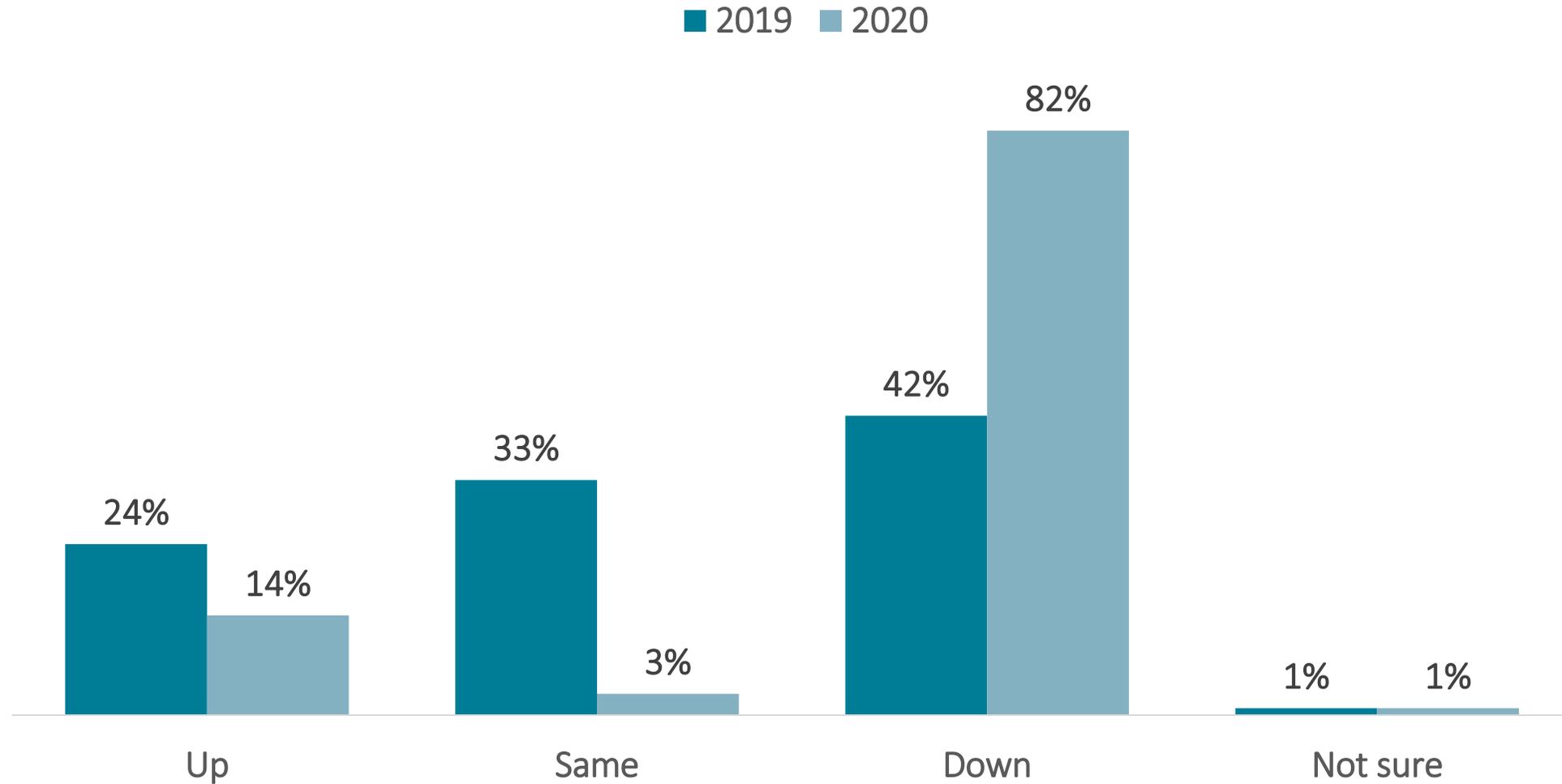
“It is beautiful and peaceful. The weather is pleasant. The sand is clean. There are many nice restaurants. There are many places to walk and have romantic moments and memories.”

**Great Place
to Visit**

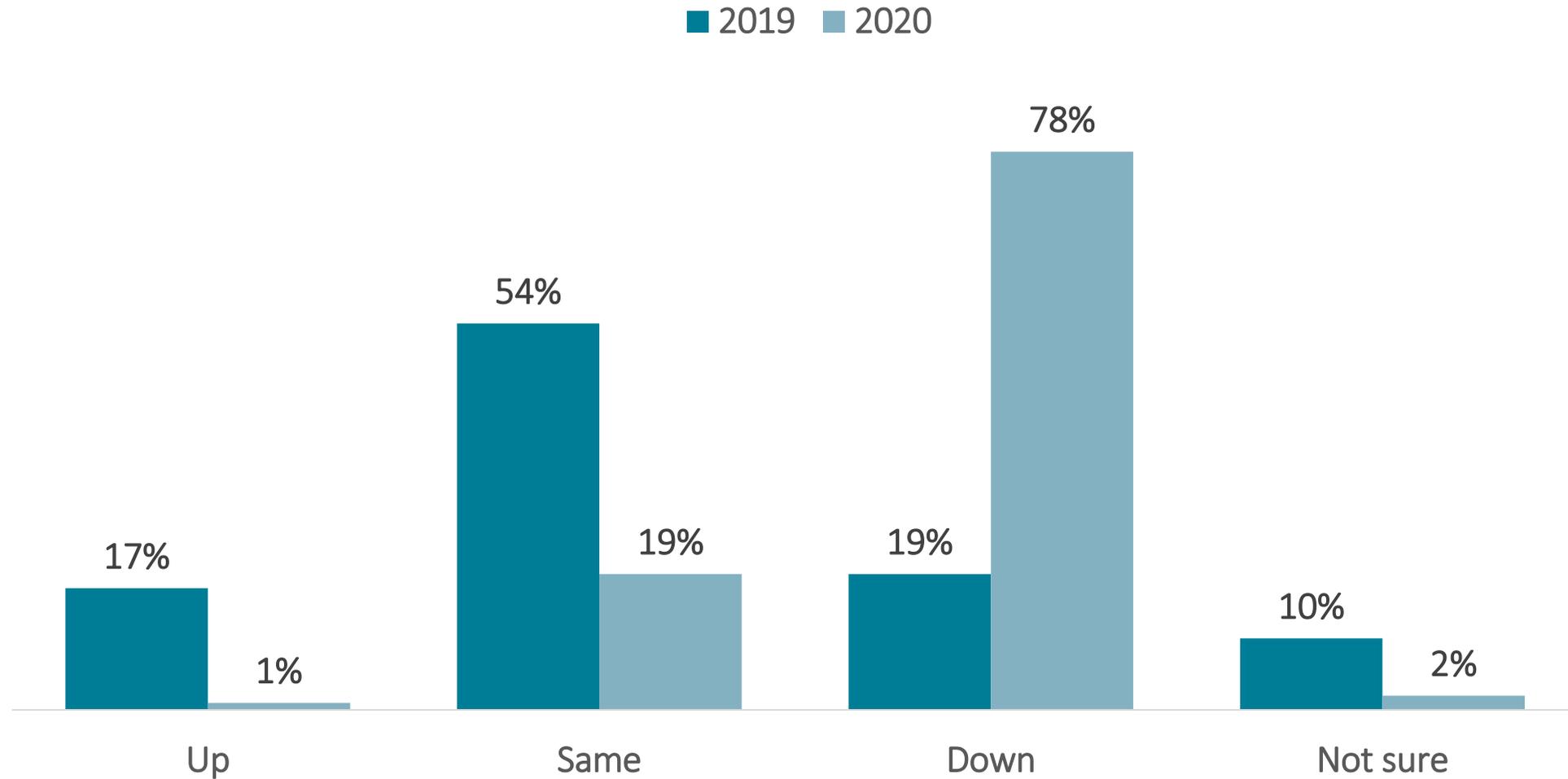
“Great place to relax and rejuvenate with as little or as much as you want to do.”

**Relaxing &
Peaceful**

Occupancy Barometer: July – September Reservations



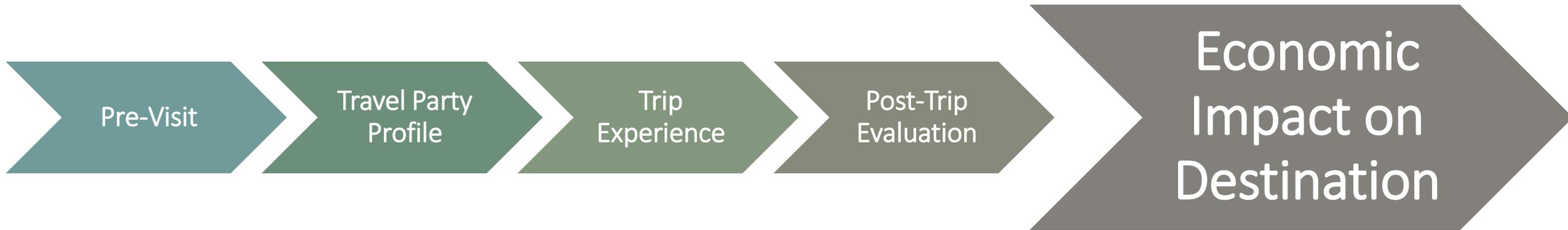
Occupancy Barometer: October – December Reservations



Detailed Findings

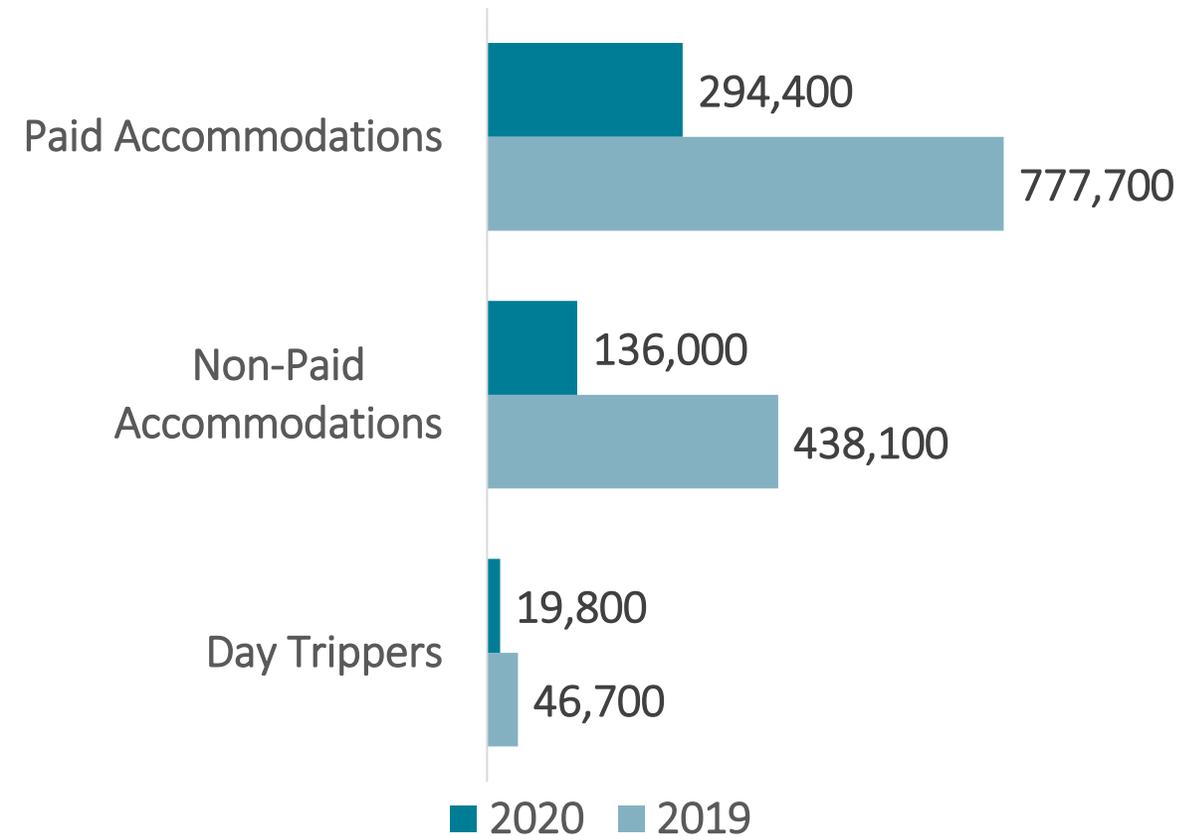


Visitor Journey: Economic Impact on Destination



Number of Visitors

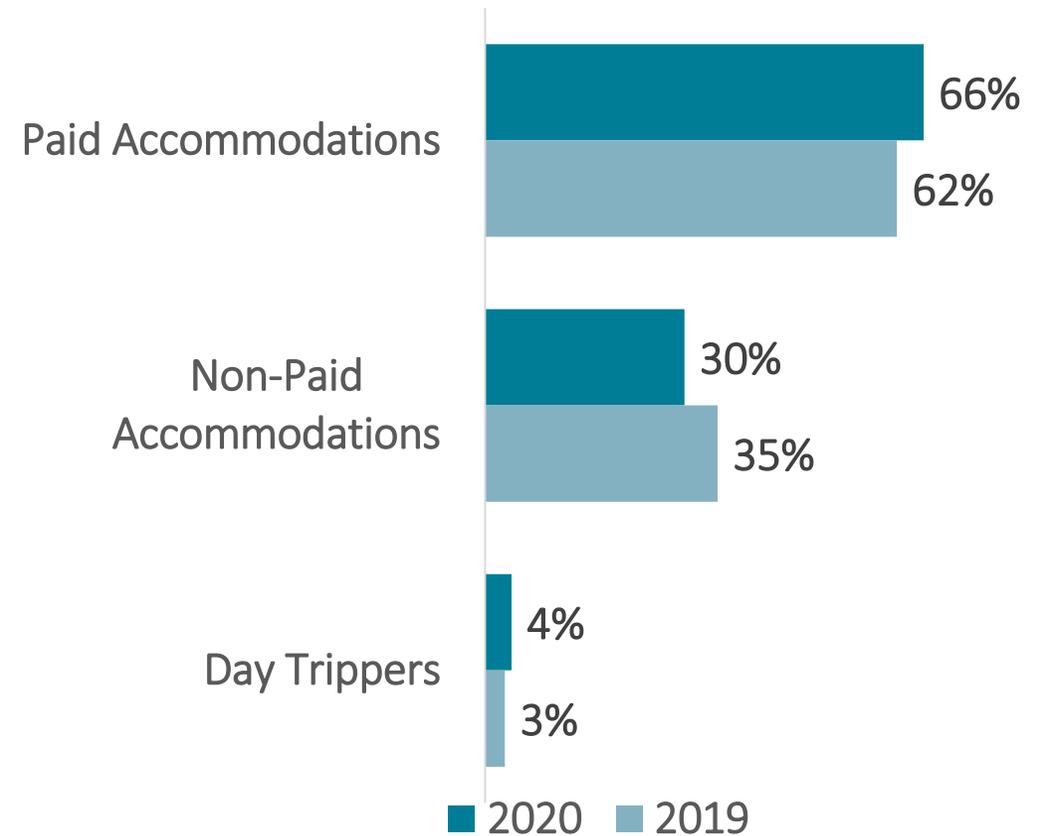
There were **450,200¹** visitors to The Beaches of Fort Myers & Sanibel in Apr - June 2020 (-64.3% from 2019).



¹Sources: Visitor Tracking Study & Occupancy Survey

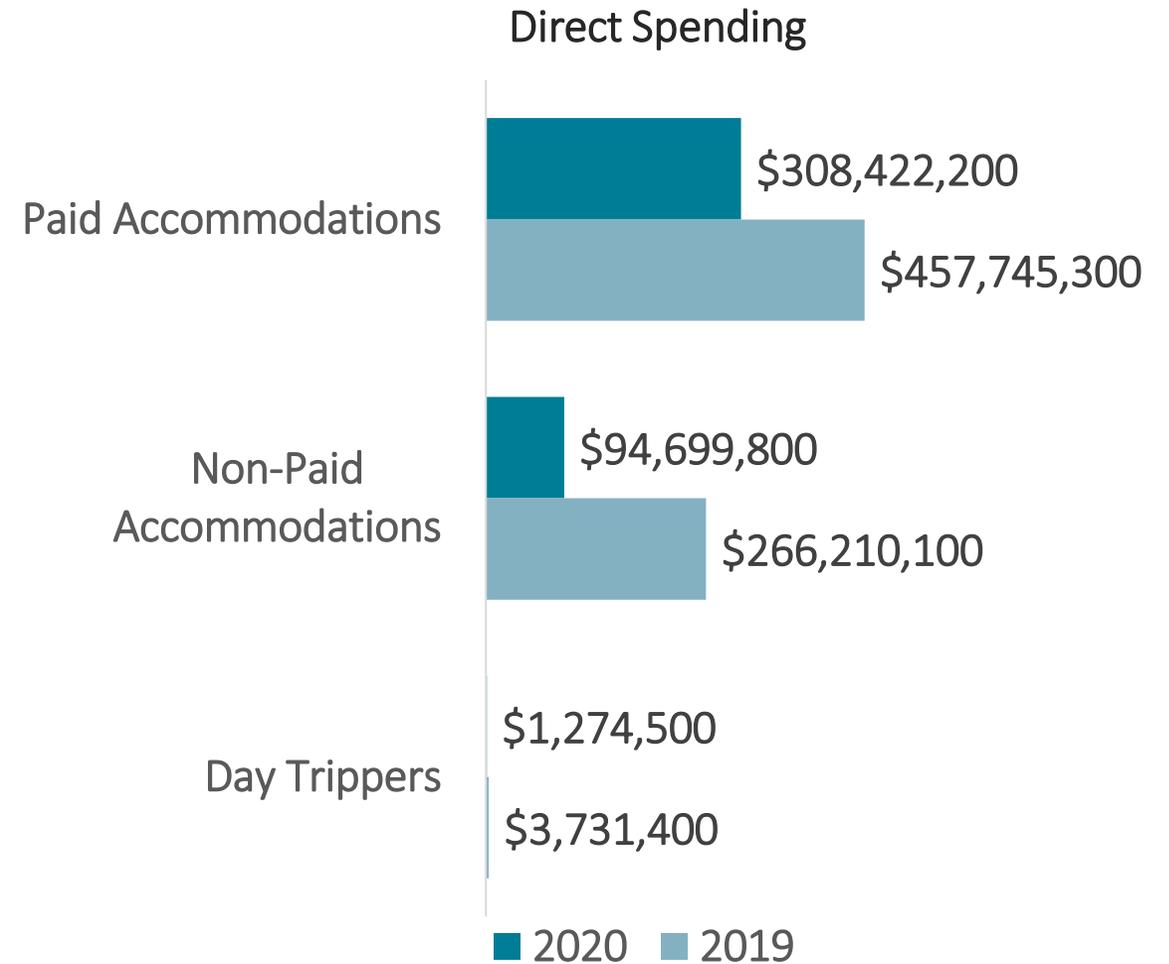
Visitor Type

Visitors staying in paid accommodations accounted for **two-thirds** of all visitors.



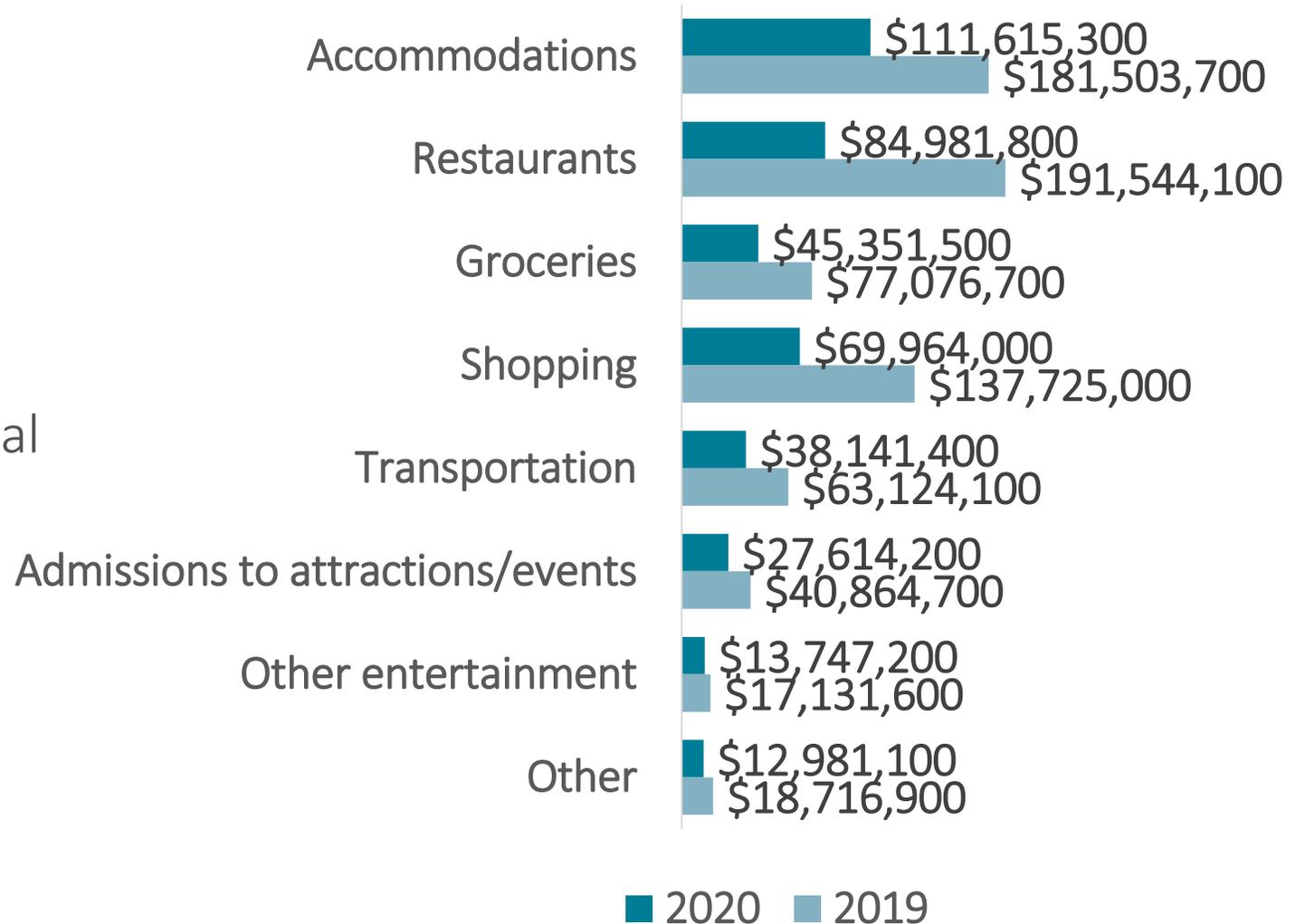
Visitor Expenditures by Visitor Type

Apr – June visitors spent **\$404,396,500** in The Beaches of Fort Myers & Sanibel, resulting in a total economic impact of **\$656,739,900**, down 44.4% from 2019.



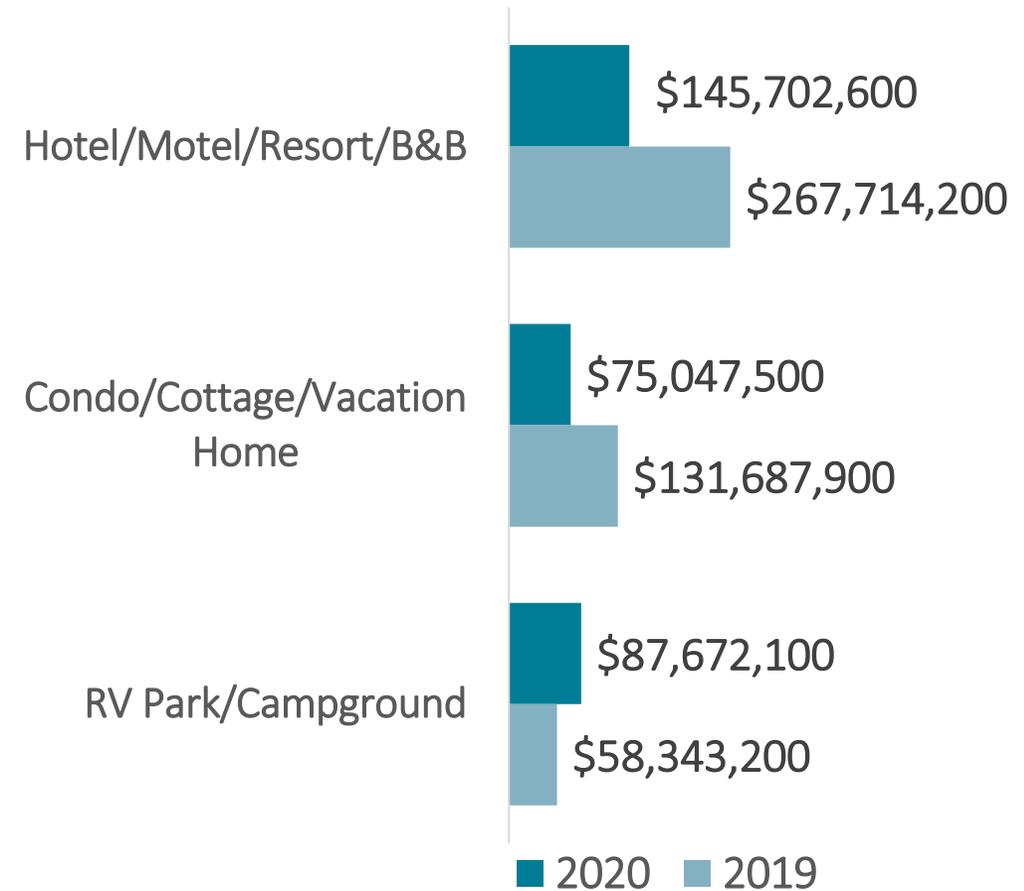
Visitor Expenditures by Spending Category

Apr – June visitors spent **\$404,396,500** in The Beaches of Fort Myers & Sanibel, resulting in a total economic impact of **\$656,739,900**, down 44.4% from 2019.



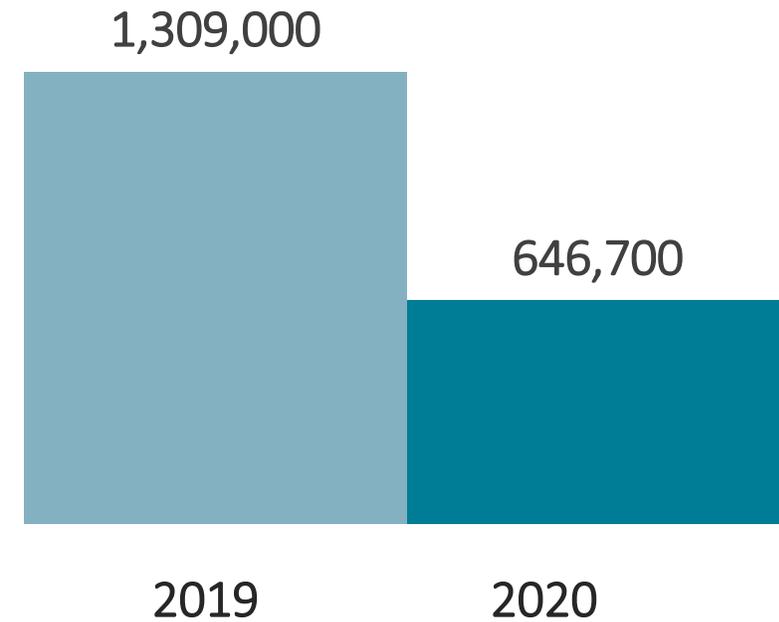
Visitor Expenditures by Lodging Type

Apr – June visitors staying in paid accommodations spent **\$308,422,200** in The Beaches of Fort Myers & Sanibel (-32.6% from 2019).



Room Nights Generated

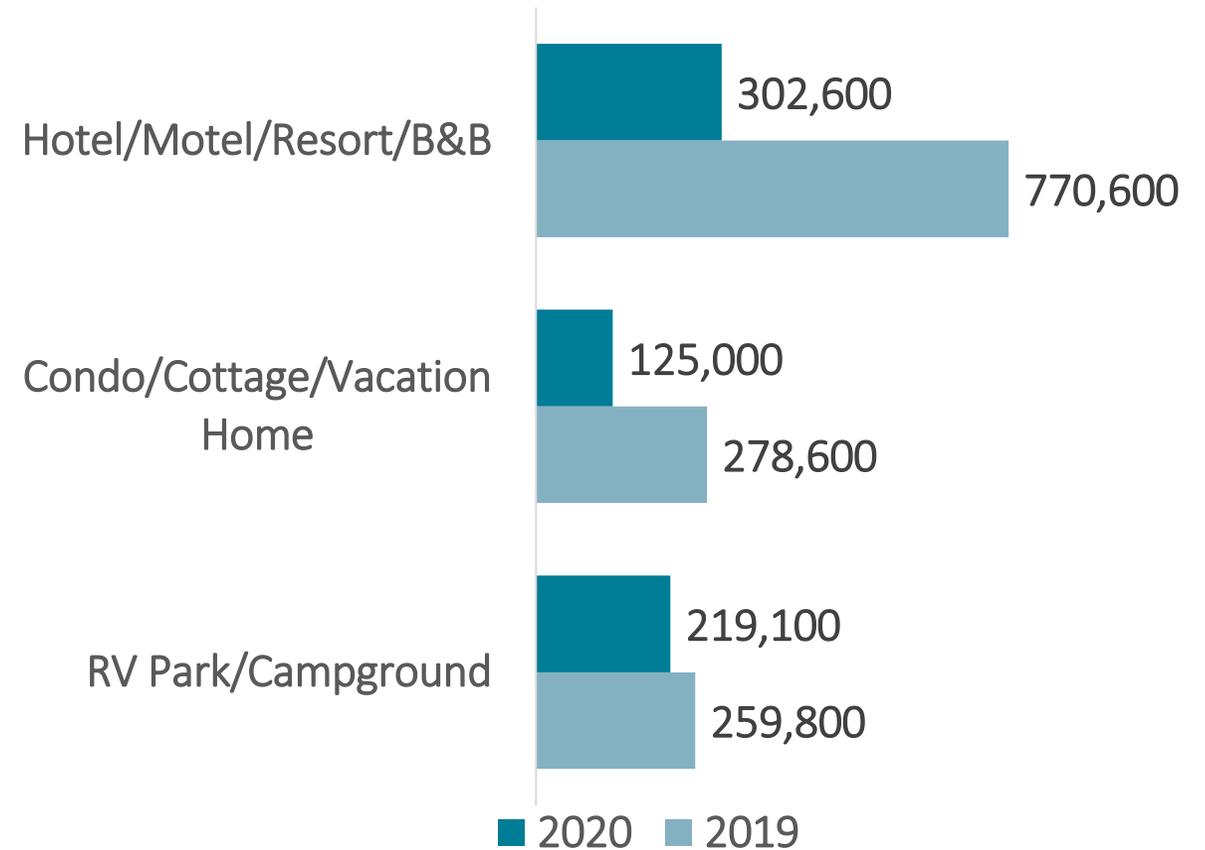
Apr – June visitors spent **646,700¹** nights in The Beaches of Fort Myers & Sanibel hotels, resorts, condos, rental houses, etc. (-50.6% from 2019).



¹Source: Occupancy Survey

Room Nights Generated

Motels, hotels, etc. accounted for nearly **half** the nights in The Beaches of Fort Myers & Sanibel, while RV Parks & campgrounds accounted for **1 in 3** nights visitors spent in the area.

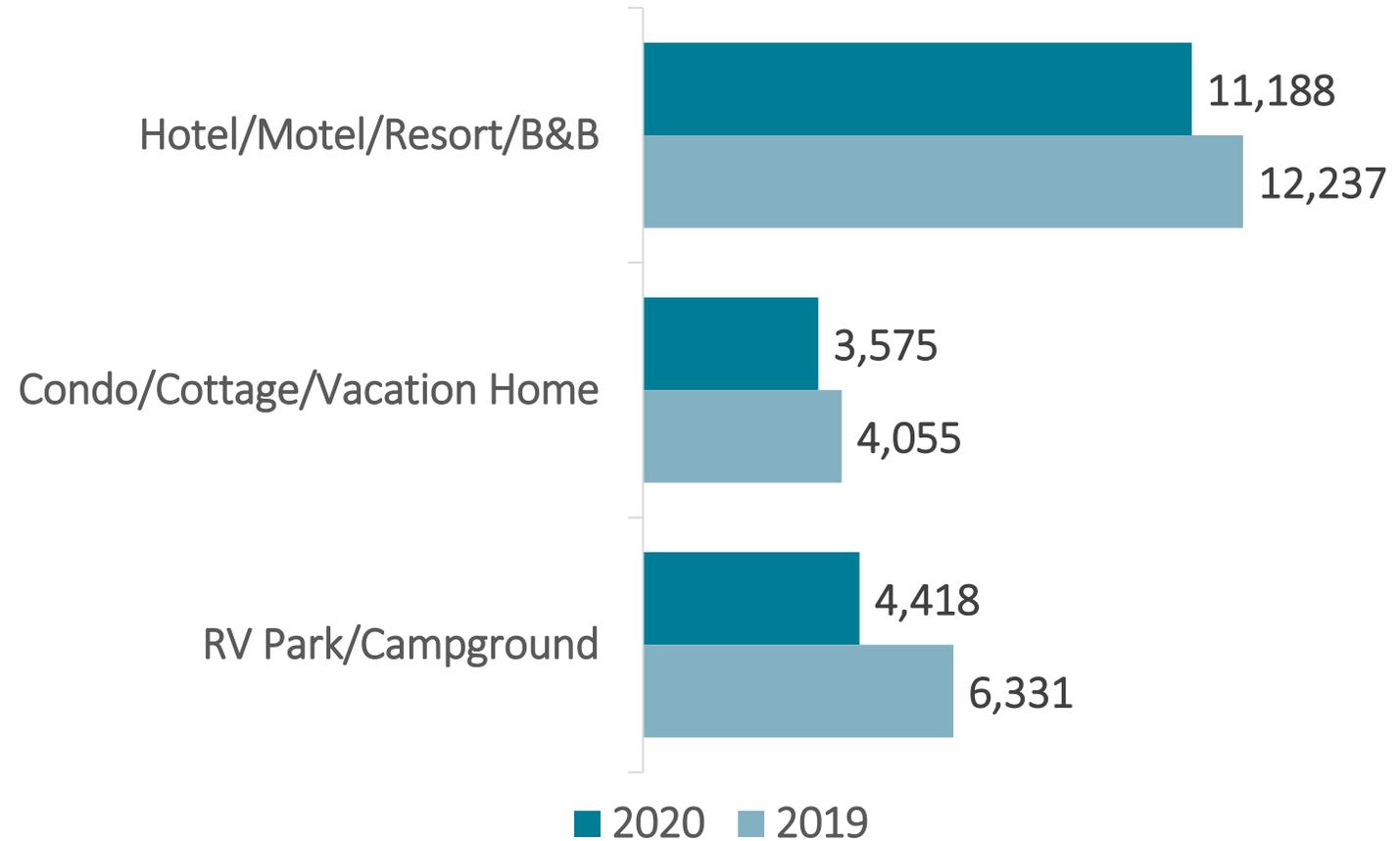


¹Source: Occupancy Survey

Available Units

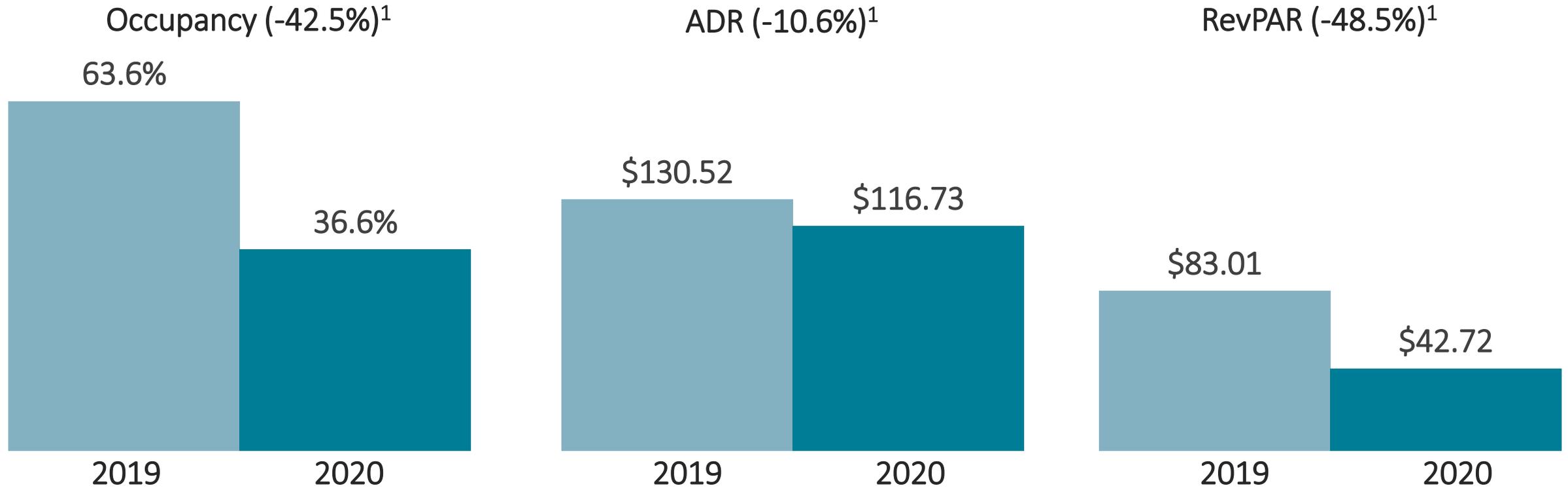
There were **19,181¹** available units in Apr – June, 2020 vs. 22,623 in 2019 (-15.2%). Over half of the units were hotels, motels, etc.

It should be noted that vacation rentals were prohibited from accepting new guests during much of this quarter.



¹Source: Occupancy Survey

Occupancy, ADR and RevPAR

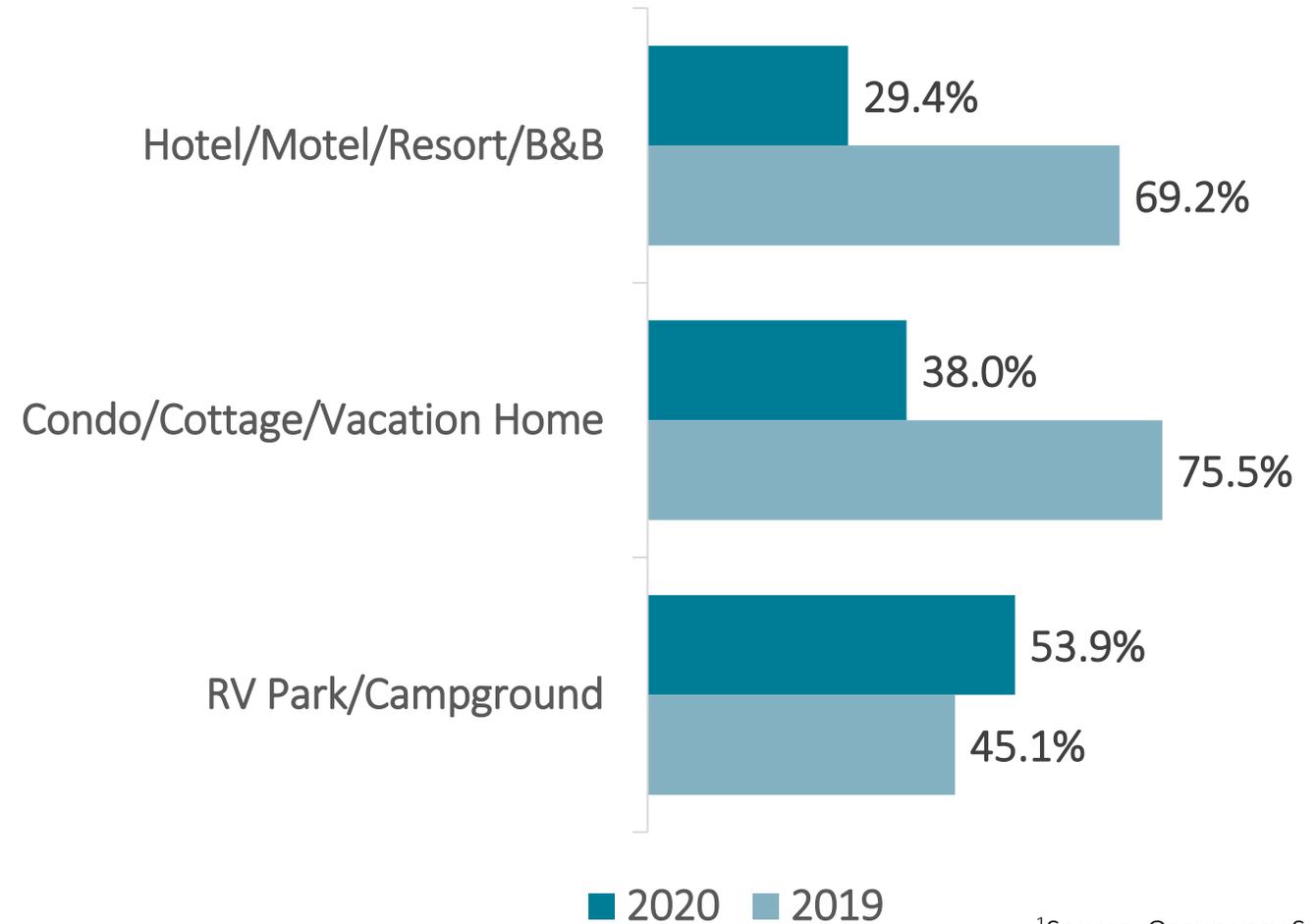


¹Source: Occupancy Survey

Occupancy

Average occupancy in Apr – June was **36.6%¹** (63.6% in 2019).

Campgrounds and RV Parks were favorably impacted by COVID-19 as average occupancy increased 19.5%.

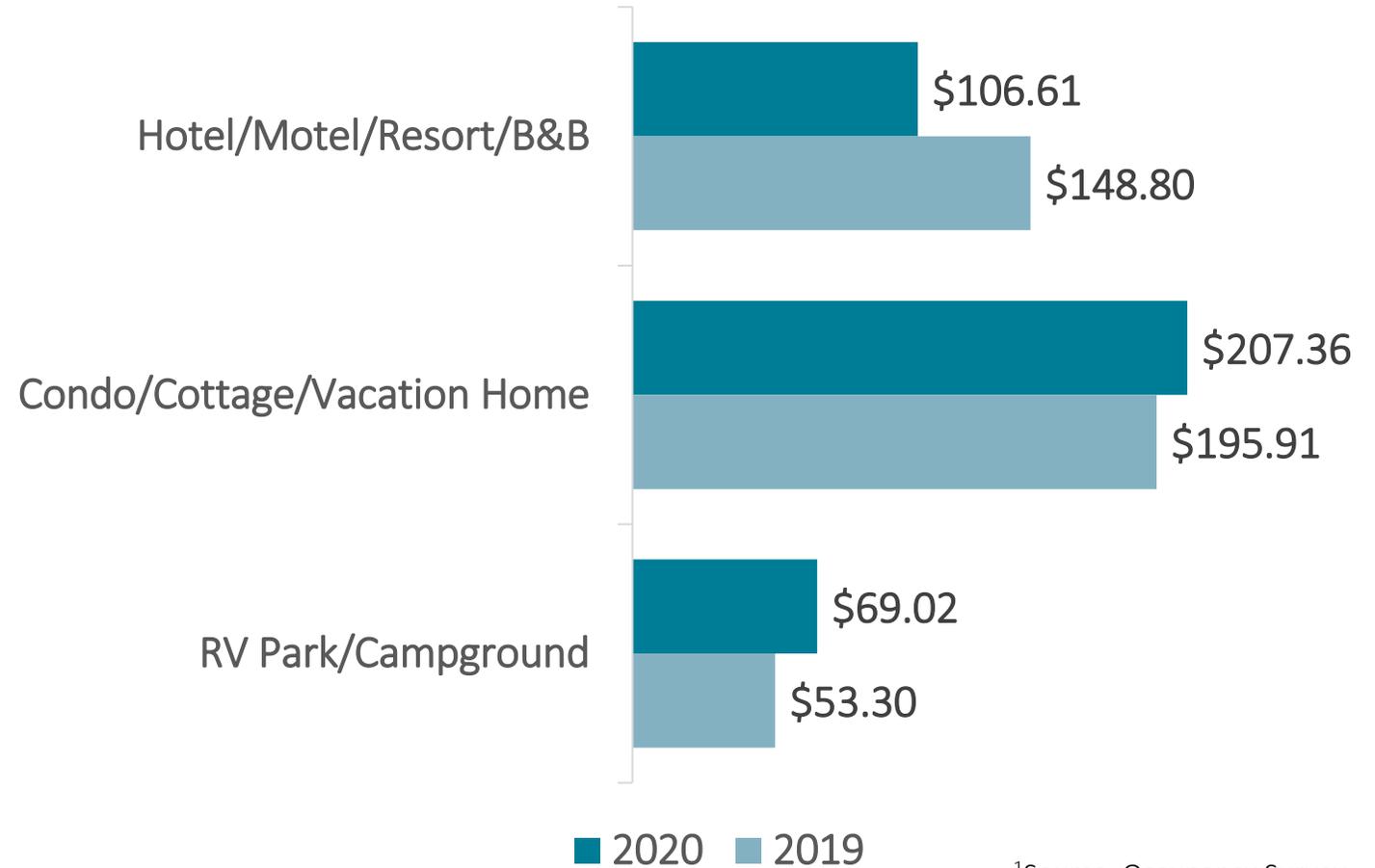


¹Source: Occupancy Survey

ADR

ADR in Apr – June was **\$116.73¹** (\$130.52 in 2019).

ADR for RV Parks & campgrounds was up 29.5%, while condo ADR increased 5.8%; conversely, hotel ADR dropped 28.4%.

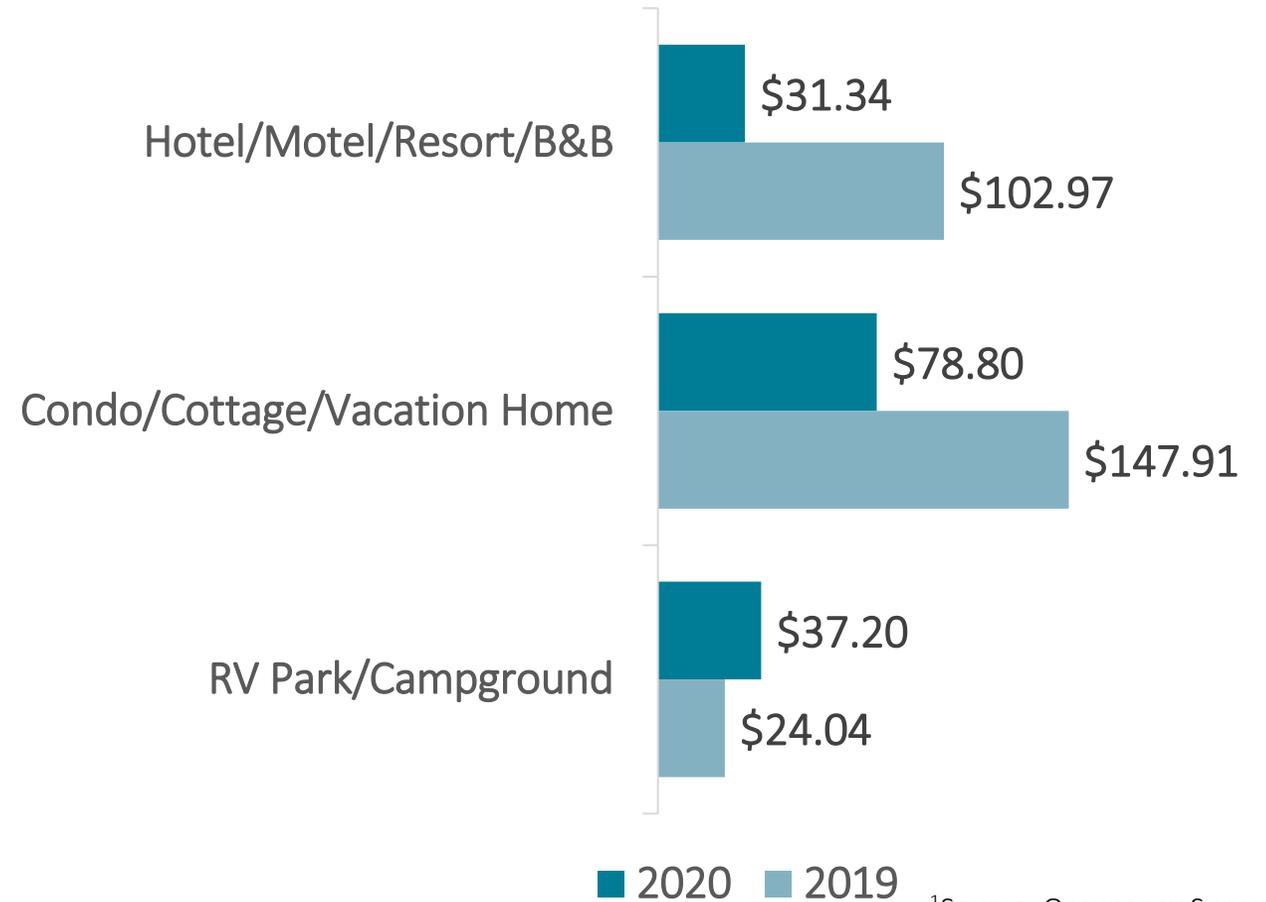


¹Source: Occupancy Survey

RevPAR

Average RevPAR in Apr – June was **\$42.72¹** (\$83.01 in 2019).

RevPAR for RV Parks & campgrounds was up 54.7%, while RevPAR for hotels and condos were down 69.6% and 46.7%, respectively.

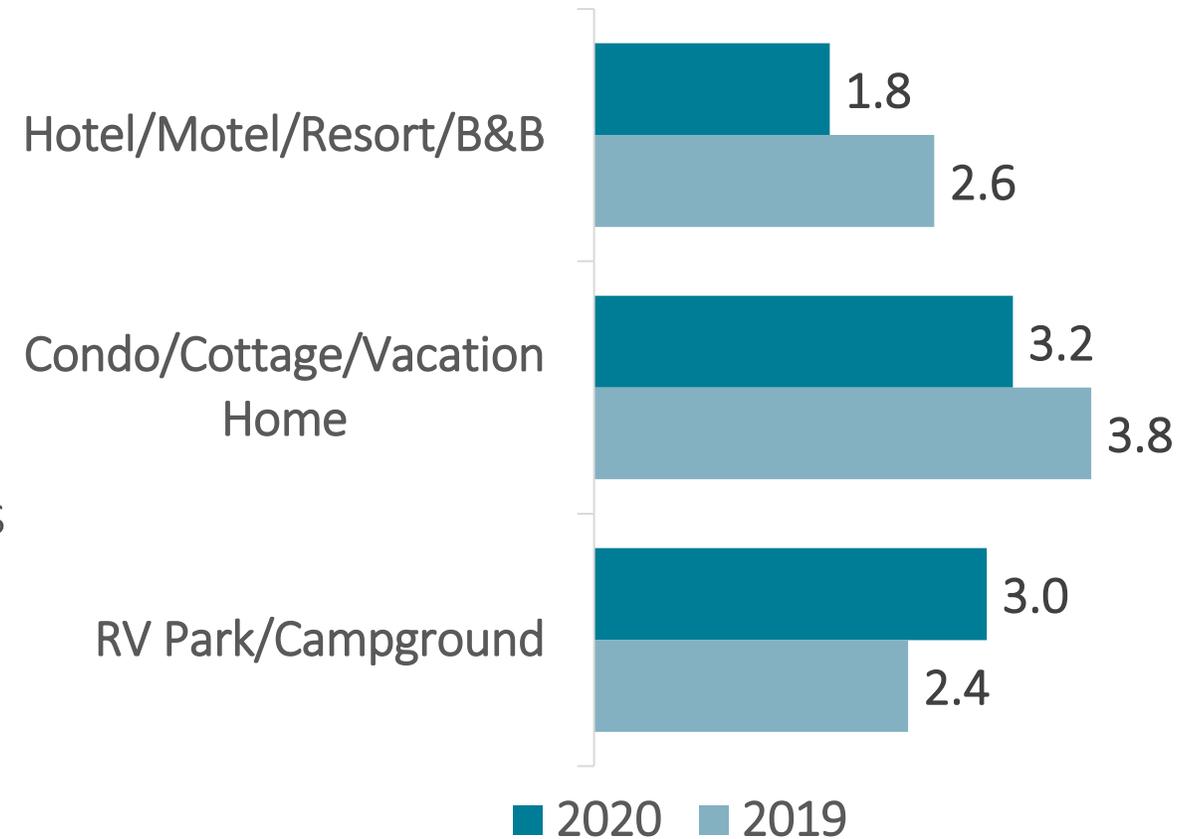


¹Source: Occupancy Survey

Travel Party Size

For visitors in paid accommodations, average travel party size in Apr – June was **2.3 people¹** (2.8 people in 2019).

Average travel party size for visitors staying in RV Parks & campgrounds increased significantly.

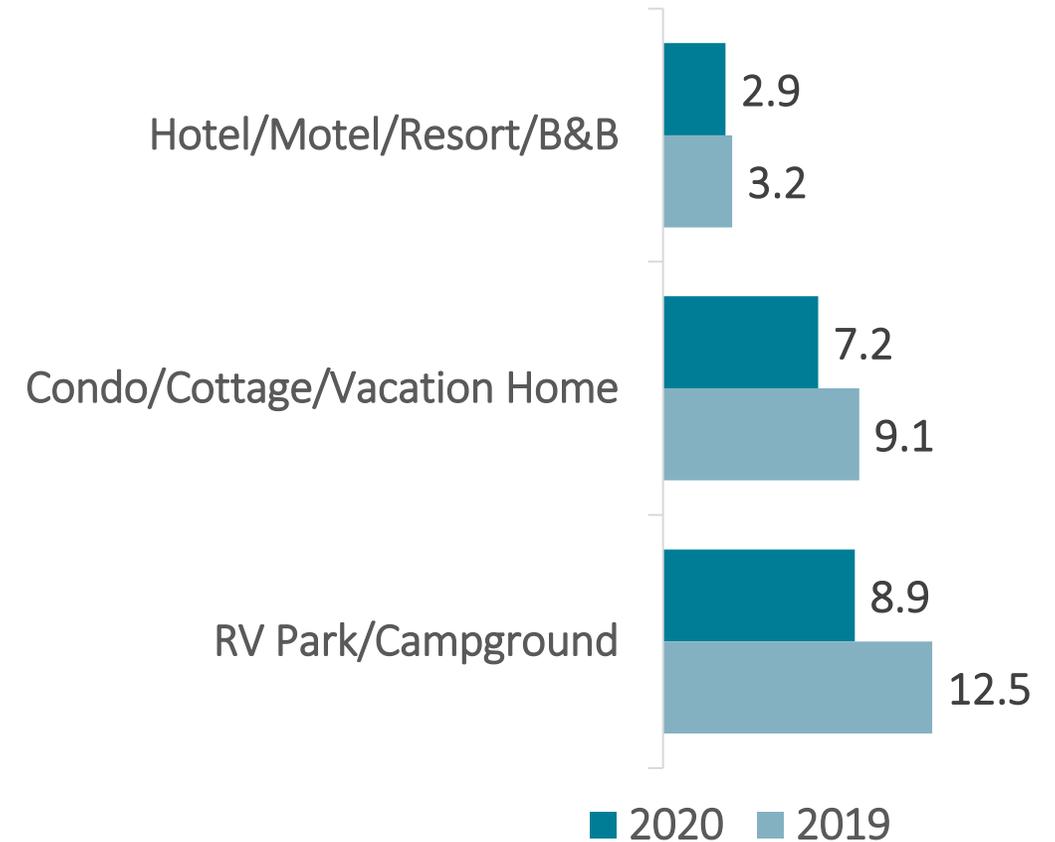


¹Source: Occupancy Survey

Length of Stay

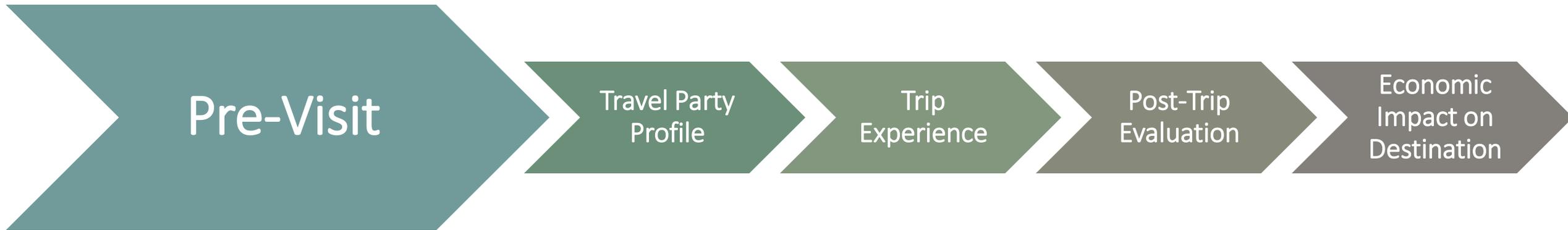
For visitors in paid accommodations, average length of stay in Apr – June was **5.0 nights¹** (4.7 nights in 2019).

Length of stay in RV Parks & campgrounds dropped precipitously.

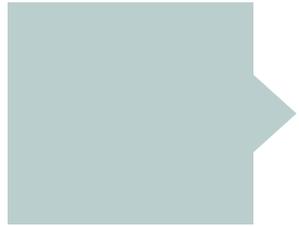


¹Source: Occupancy Survey

Visitor Journey: Pre-Visit



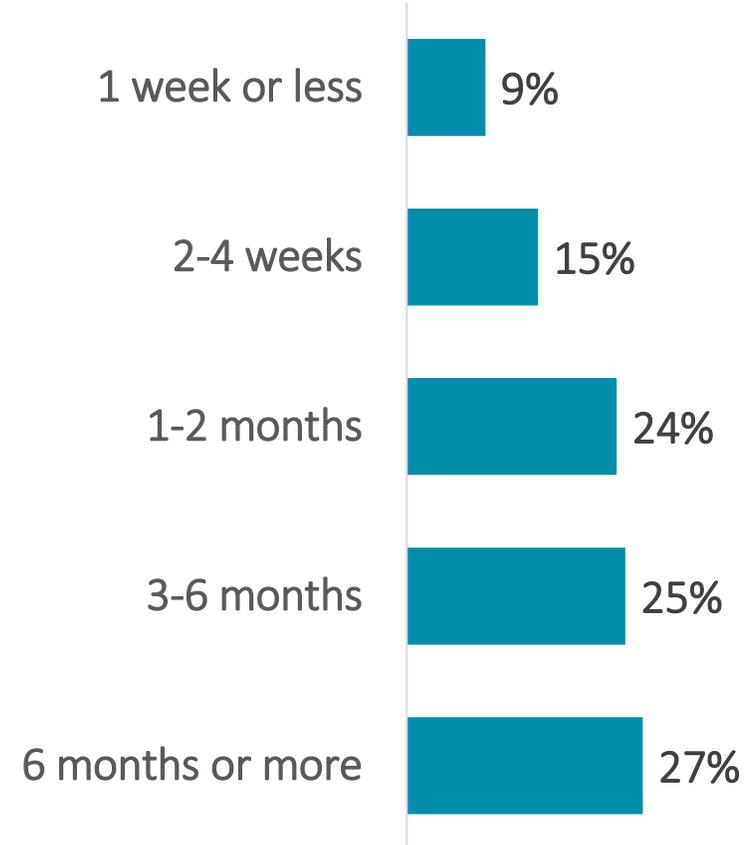
Trip Planning Cycle



Over **1 in 2** visitors planned their trip at least 3 months in advance, while **1 in 4** planned their trip less than a month in advance.



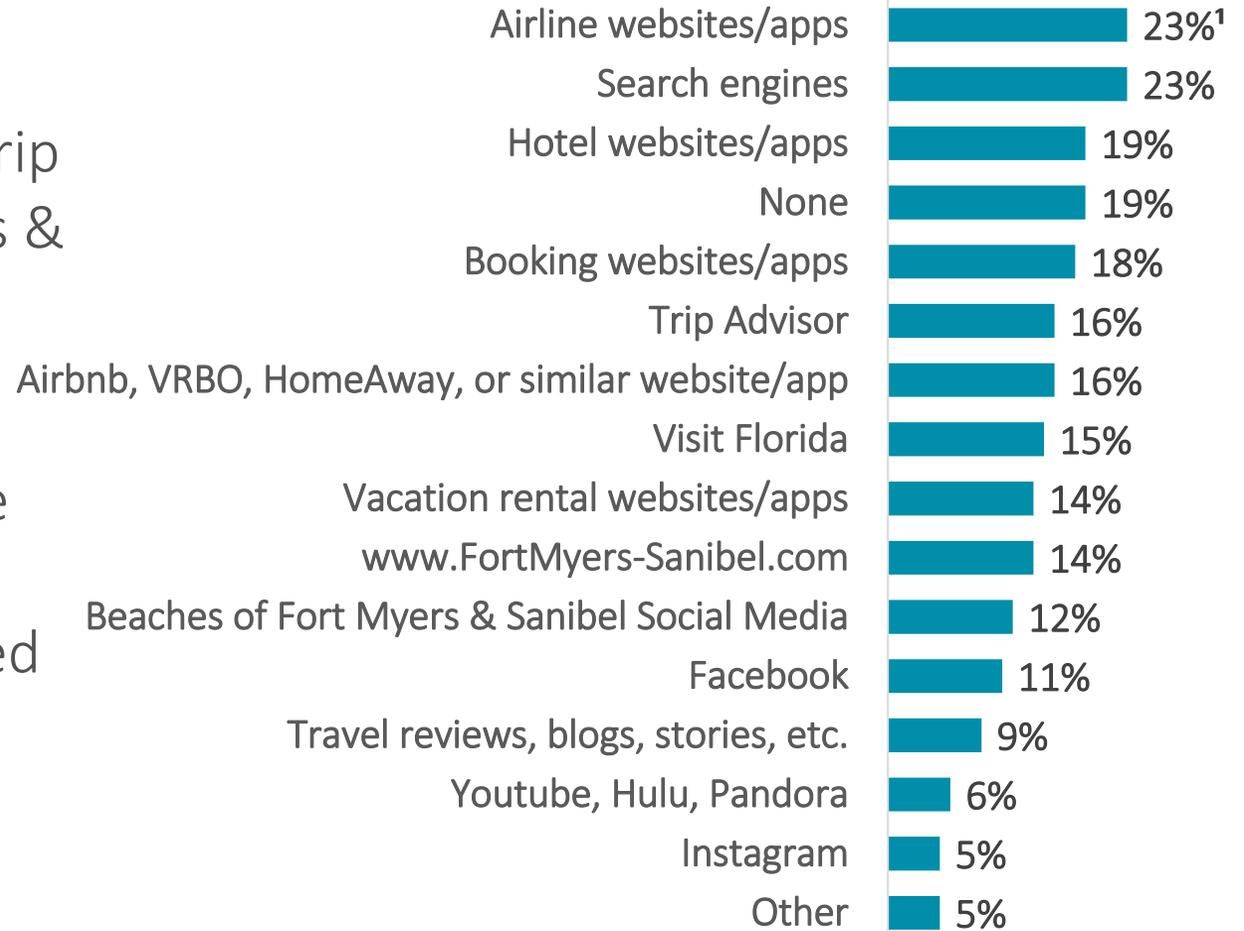
The Beaches of Fort Myers & Sanibel has a relatively long planning window, as over half of visitors took at least 3 months to plan their visits.



Trip Planning: Websites Used

8 in 10 visitors used websites/apps to plan their trip to The Beaches of Fort Myers & Sanibel.

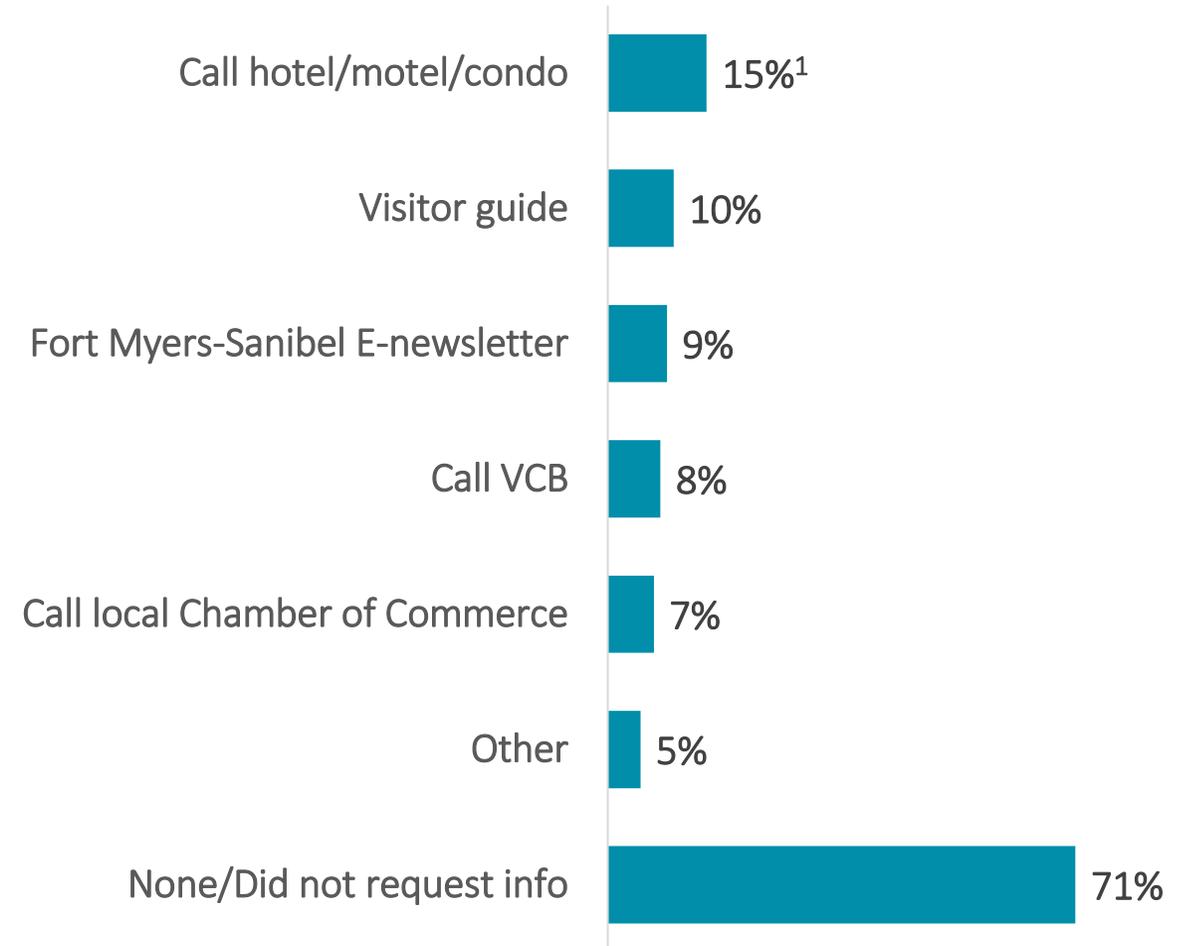
Airline & hotel websites were used most frequently, while more visitors this year sourced The Beaches of Fort Myers & Sanibel online information.



¹Multiple responses permitted.

Trip Planning: Information Requests

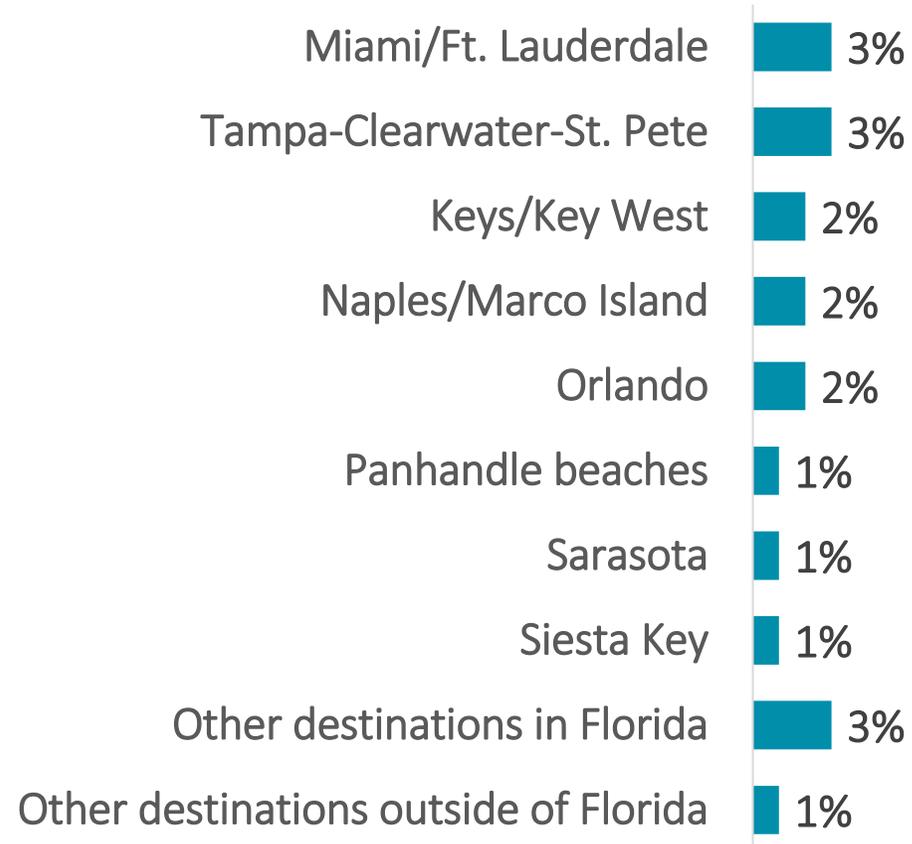
3 in 10 visitors made information requests to plan their trip to The Beaches of Fort Myers & Sanibel – more so than last year.



¹Multiple responses permitted.

Trip Planning: Other destinations considered

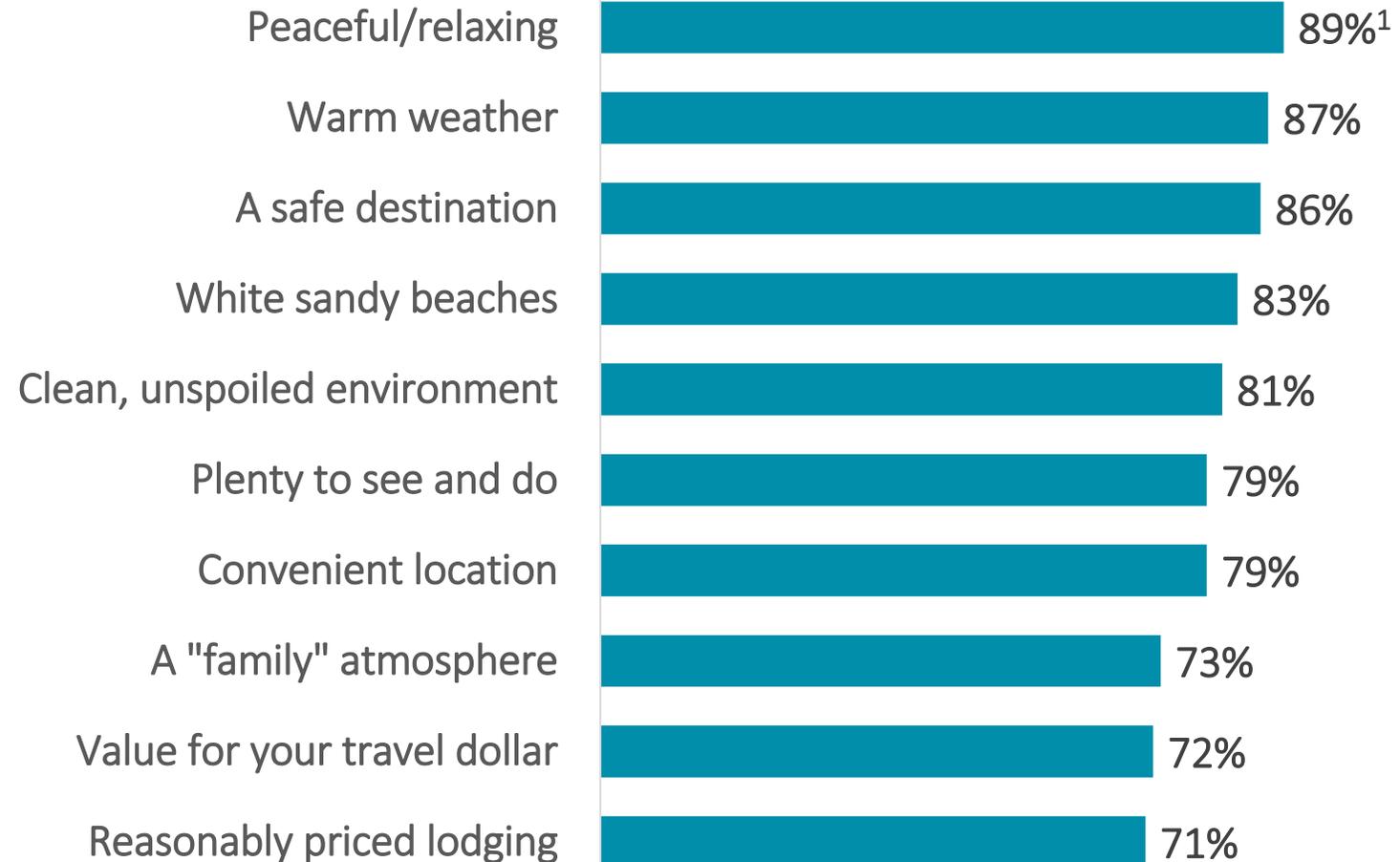
19% of visitors considered choosing other destinations when planning their trips.



Trip Influencers

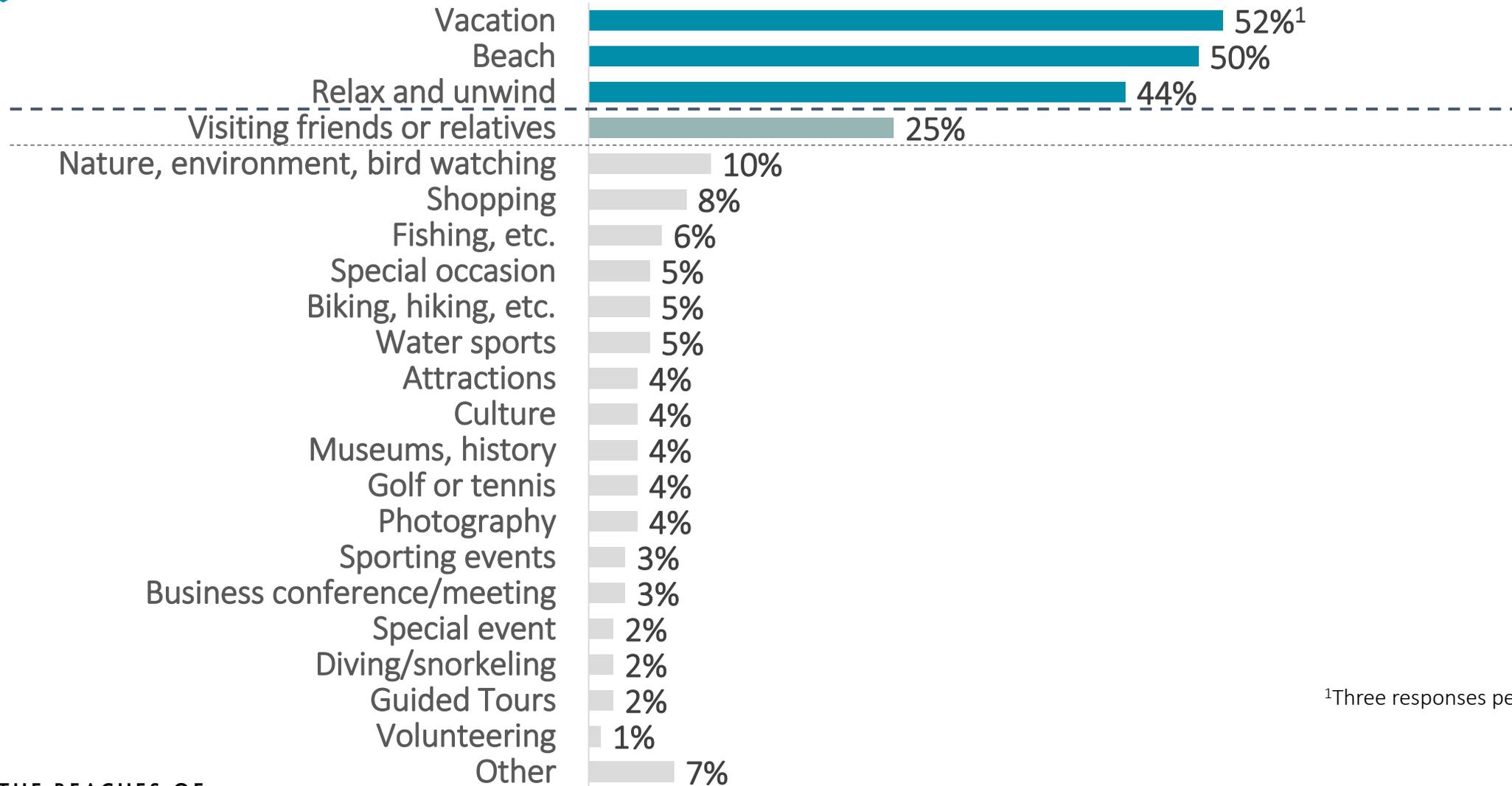
Nearly **9 in 10** visitors were heavily influenced by The Beaches of Fort Myers & Sanibel being peaceful when thinking about visiting.

Safety and cleanliness were two other key influencers and relied on more this year than last.



¹Top 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

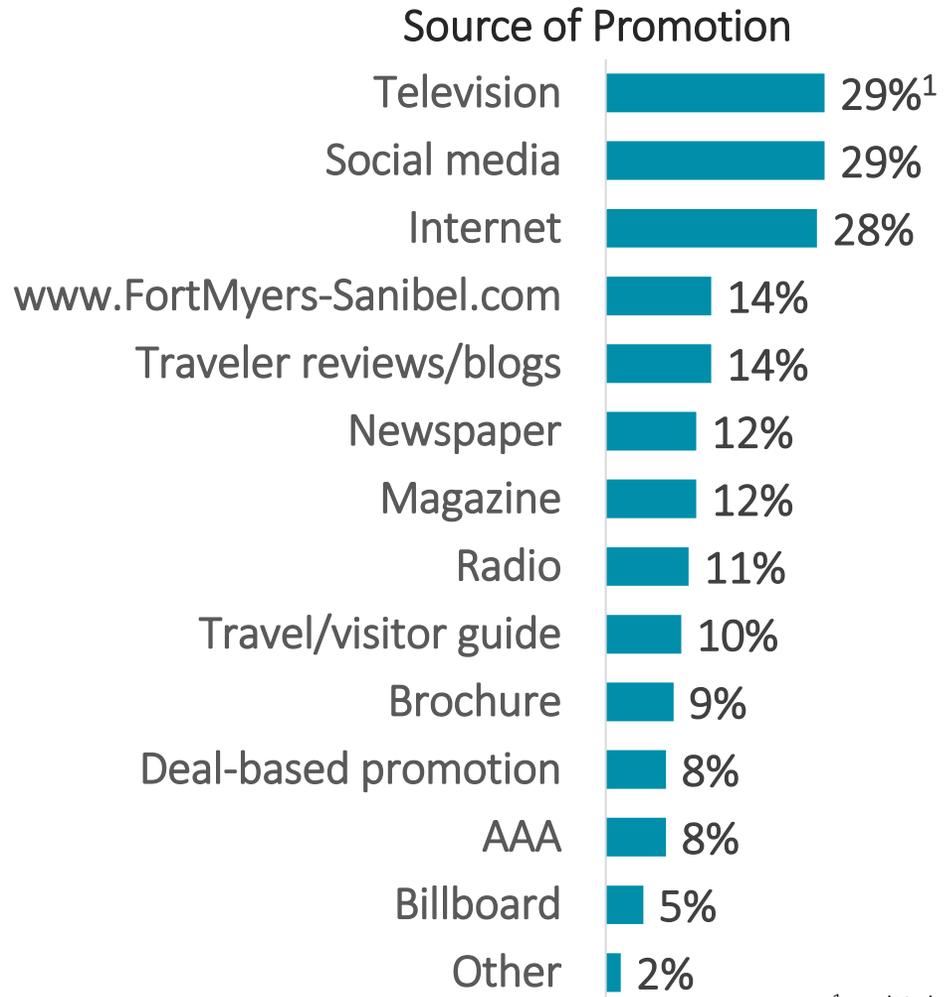


¹Three responses permitted.

Promotions

38% of visitors recalled promotions in the past 6 months for The Beaches of Fort Myers & Sanibel.

Visitors to the area rely almost as much on traditional media as they do on social media.



¹Multiple responses permitted.

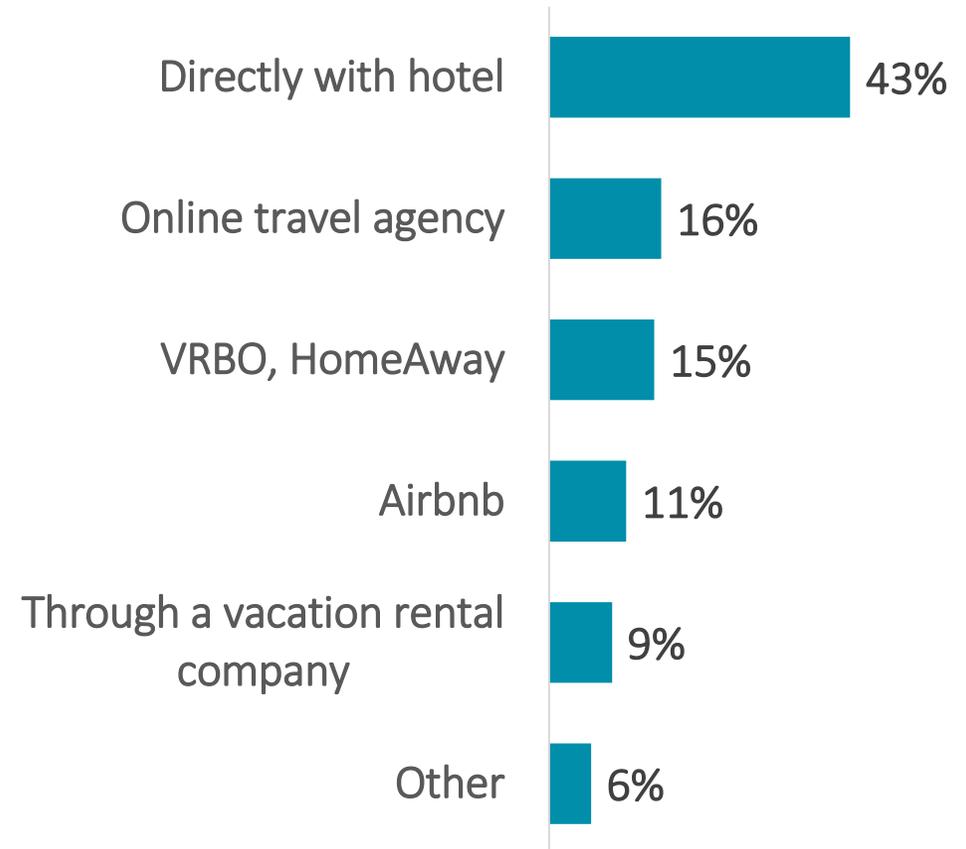
Booking



Over **4 in 10** visitors who stayed in paid accommodations booked directly with a hotel/condo.



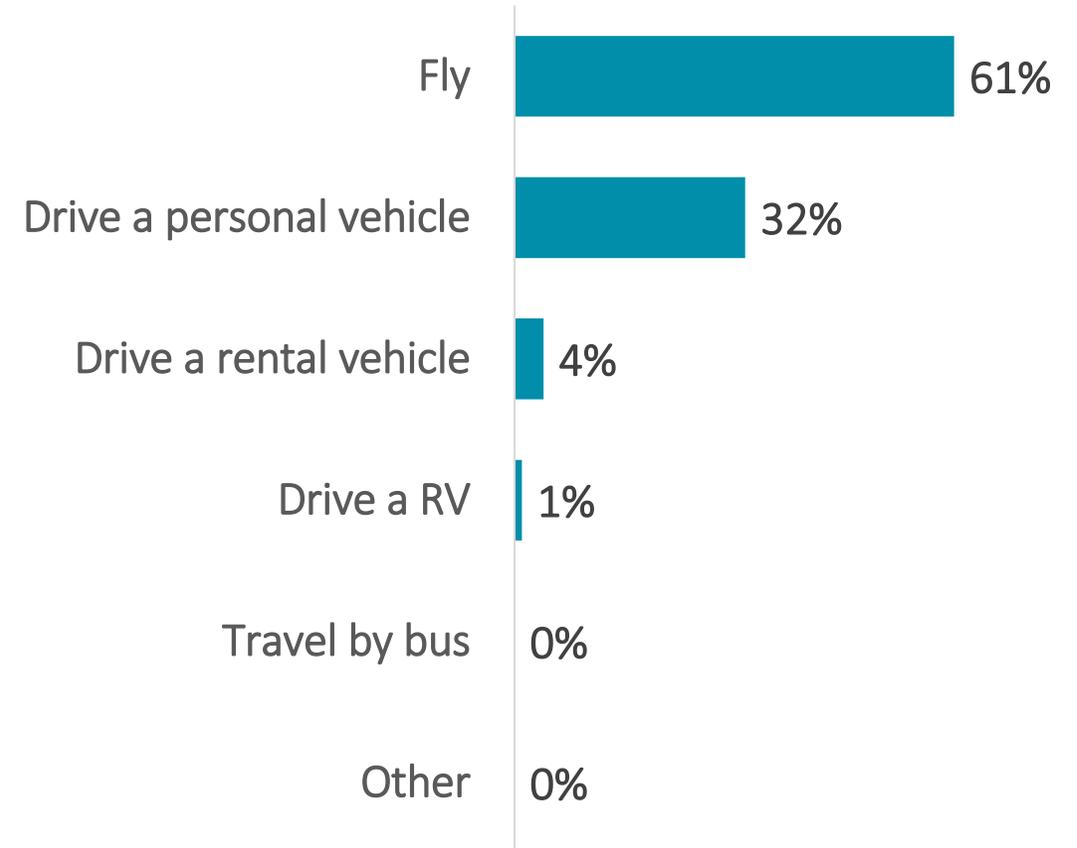
Together, short-term rental platforms such as VRBO and Airbnb accounted for over **1 in 4** bookings.



Transportation



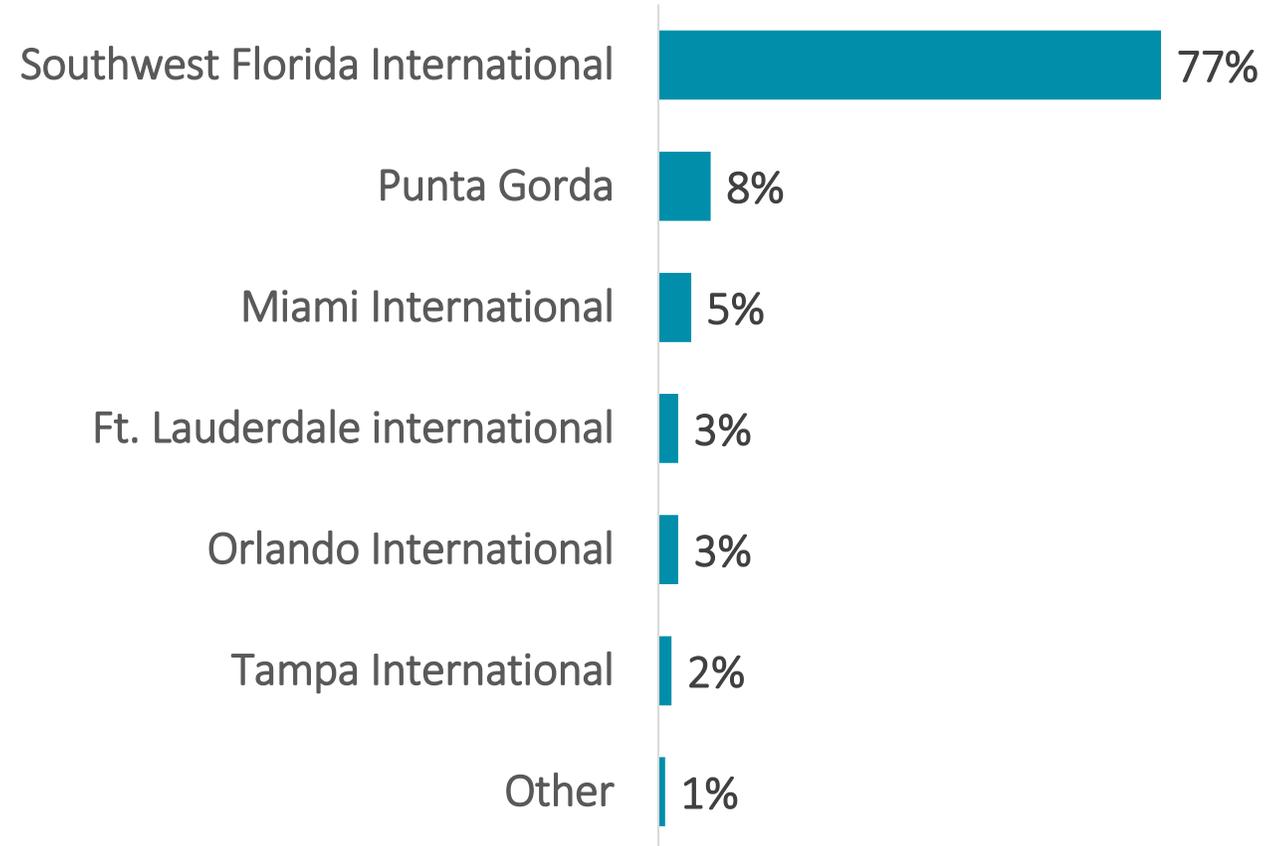
6 in 10 visitors flew to The Beaches of Fort Myers & Sanibel.



Airport

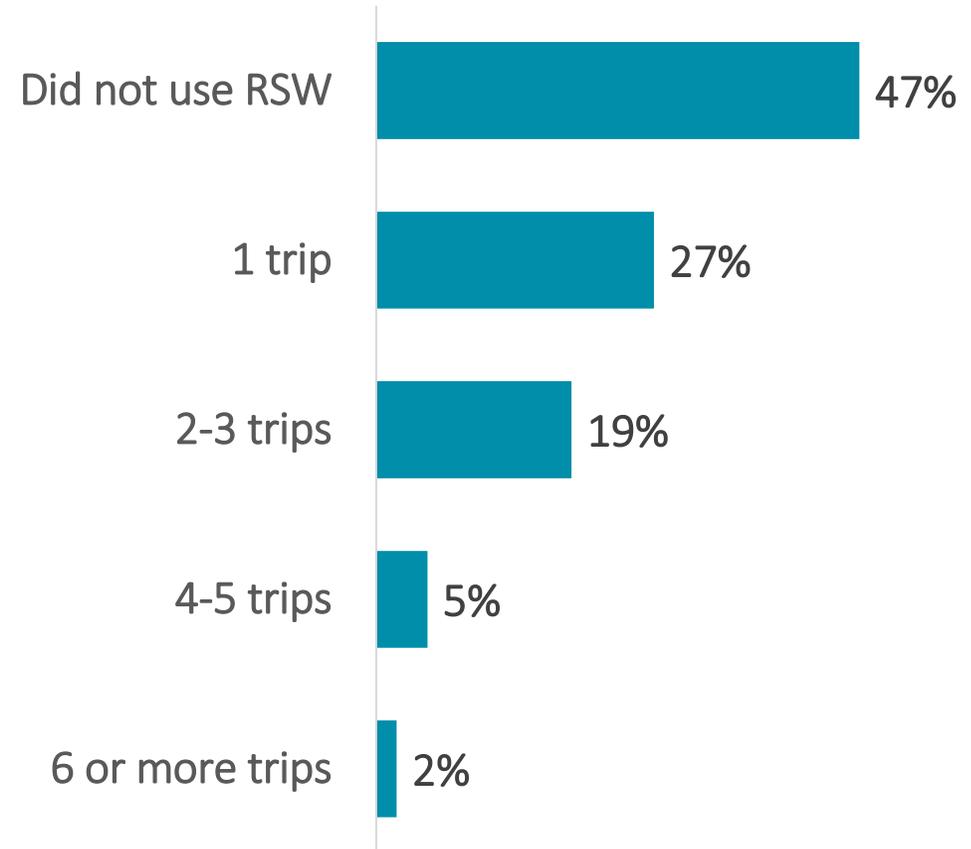


Over **3 in 4** visitors who flew to The Beaches of Fort Myers & Sanibel came through RSW.



Use of RSW in the Past Year

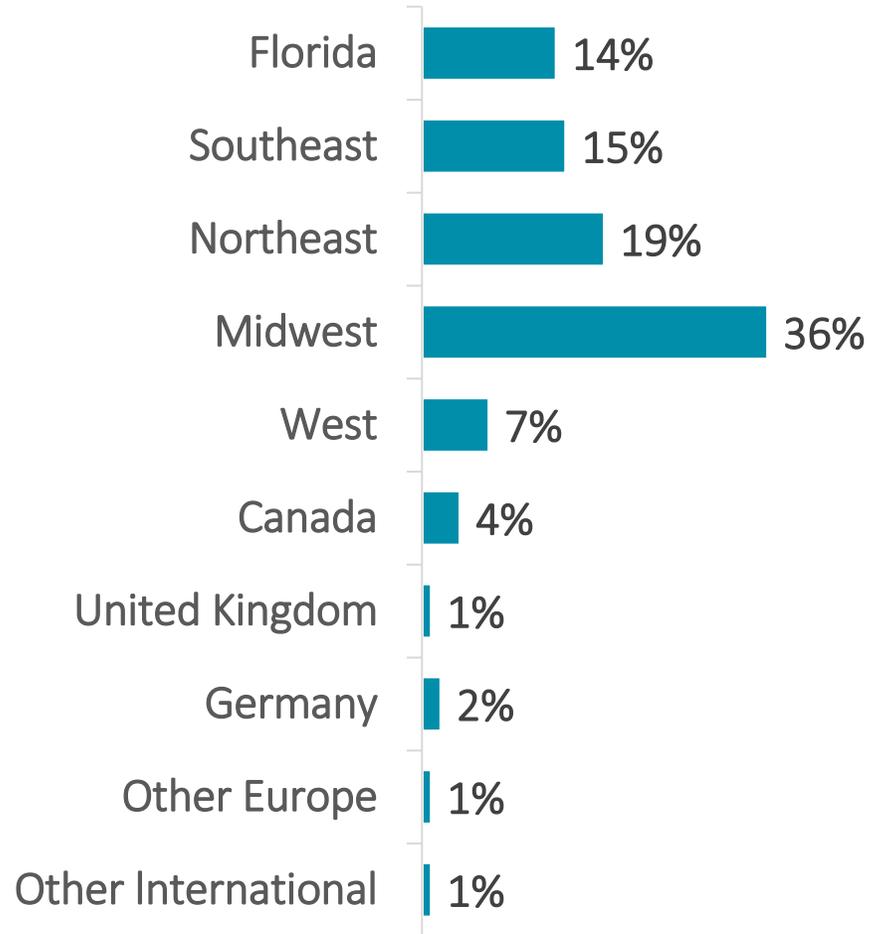
53% of visitors used RSW at least once in the past year.



Visitor Journey: Travel Party Profile

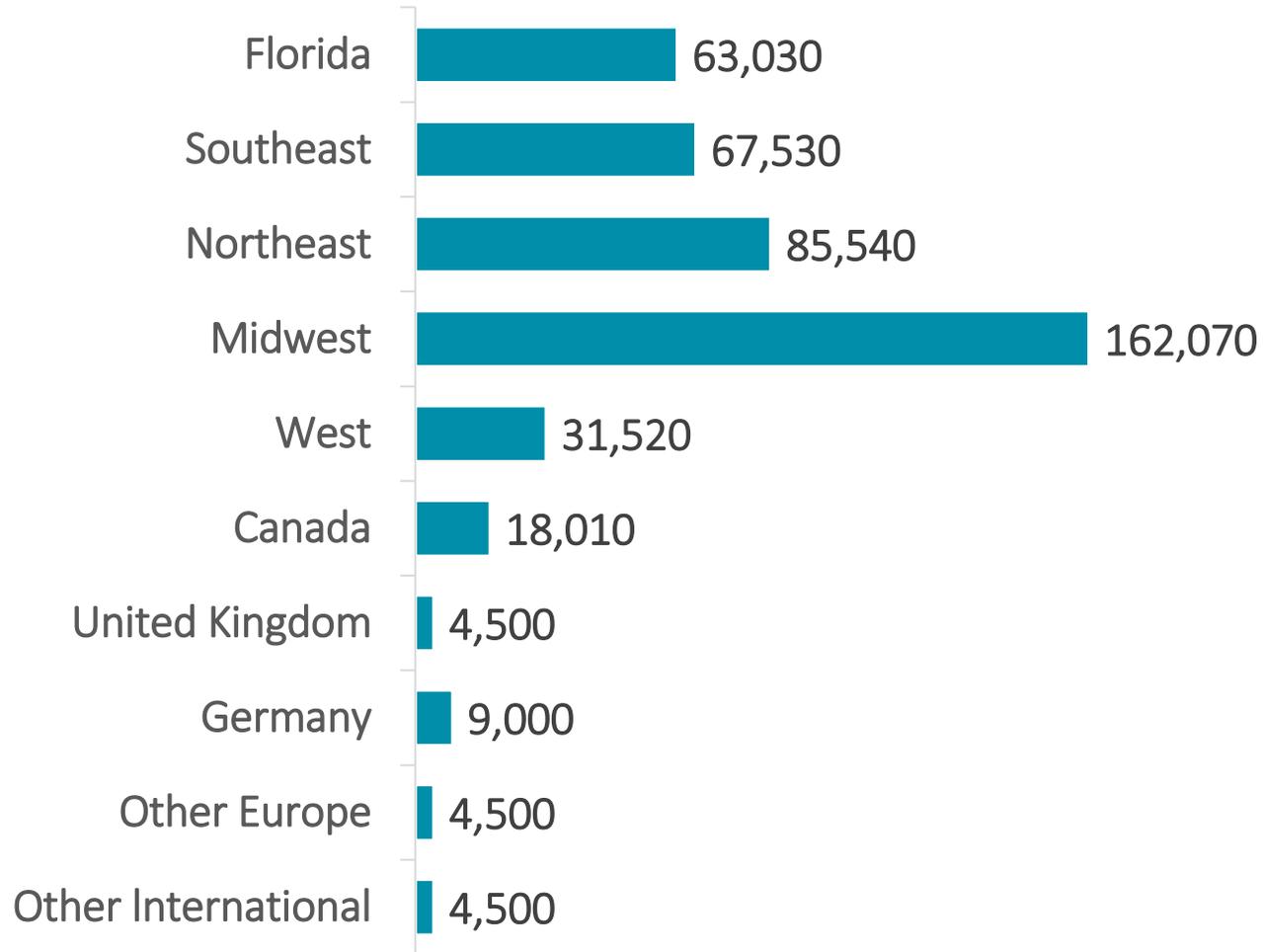


Origin¹



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

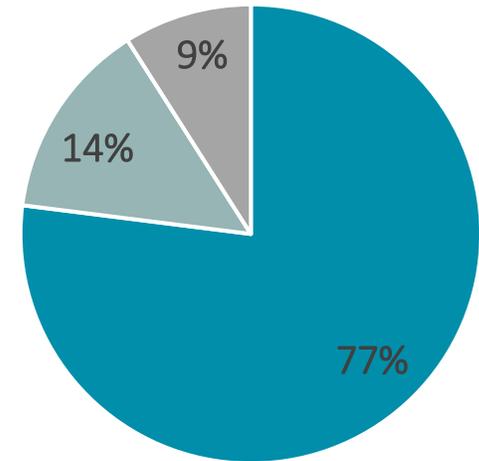
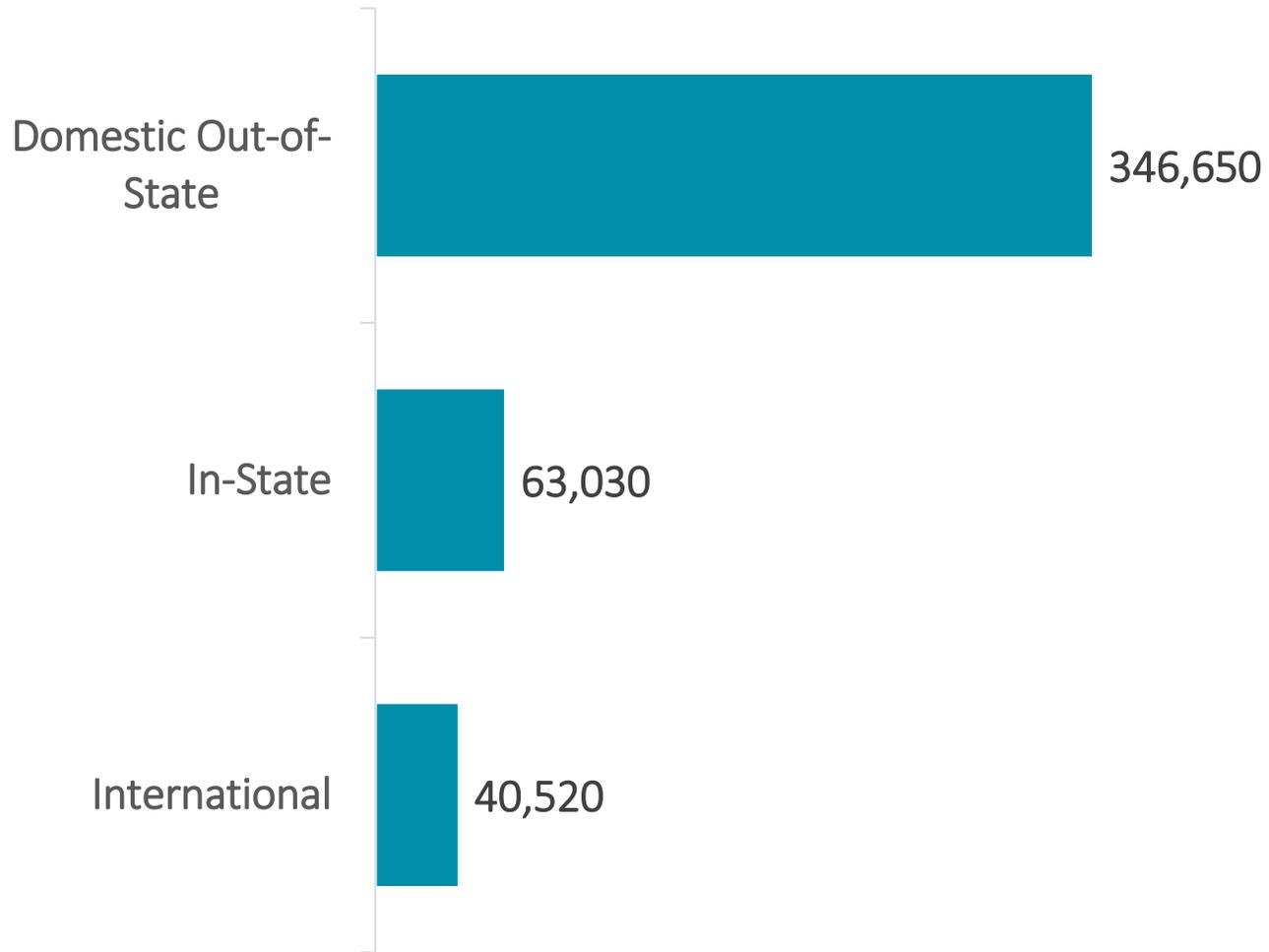
Number of Visitors by Origin



Visitation was down across the board, but especially so for:

- 71.5% - Canada
- 85.2% - Other international origins
- 67.7% - Northeast
- 64.3% - Midwest

Number of Visitors by Origin



- Domestic Out-of-State
- In-State
- International

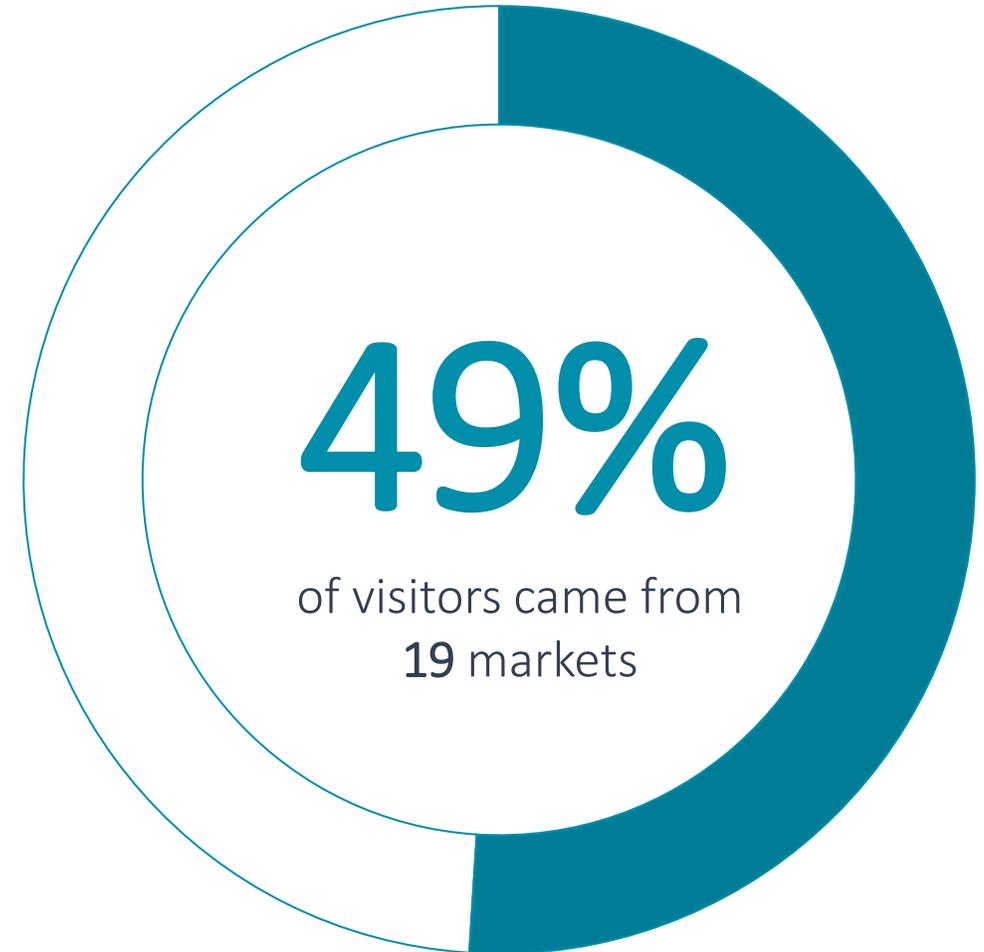
Origin Country

Country ¹	% of Visitors
United States	91%
Germany	2%
Canada	4%
United Kingdom	1%
Other	2%

¹1% or fewer visitors came from Australia, Belgium, Catalonia, Columbia, Greece, Ireland, The Netherlands, Sweden, Switzerland, and Venezuela.

Origin Markets¹

Market	Percentage of Visitors
Miami - Ft. Lauderdale	6%
Minneapolis-Saint Paul	4%
Chicago	4%
New York	4%
Detroit	3%
Boston	2%
Tampa - Clearwater - St. Pete	2%
Atlanta	2%
St. Louis	2%
Cincinnati	2%
Philadelphia	2%
Milwaukee	2%
Cleveland-Akron	2%
Orlando	2%
Pittsburgh	2%
Washington D.C	2%
Grand Rapids	2%
Indianapolis	2%
Naples	2%



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

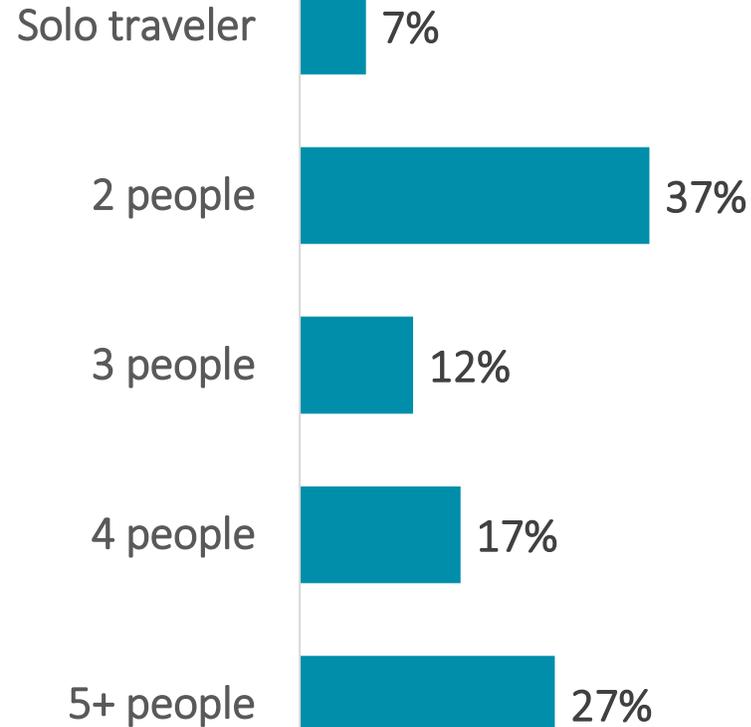
Travel Party Size and Composition

Travel Party Size

Visitors traveled in a party composed of **3.6¹** people.

Travel with Children

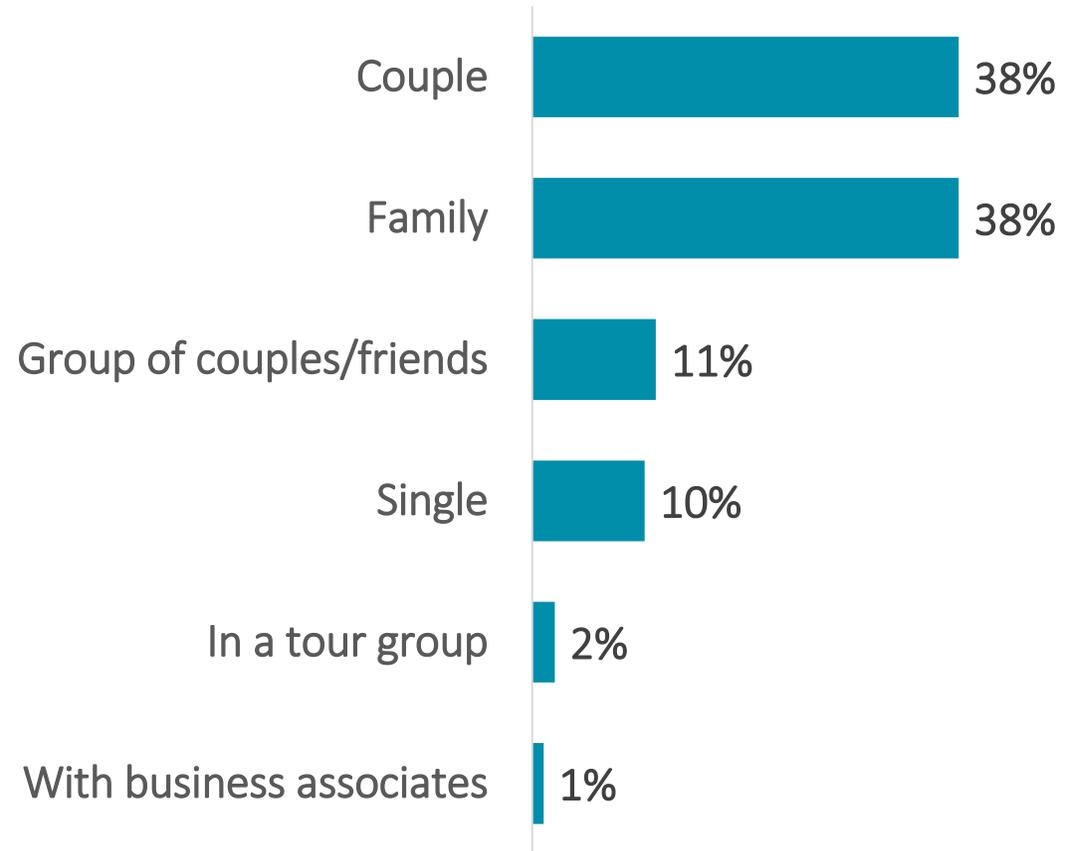
30% of visitors traveled with children under the age of 18.



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

Travel Party Type

38% of visitors traveled as a couple, and another **38%** traveled as a family.



Age

Average Age

The average age of Apr – June visitors was **49 years old**.

The typical visitor was younger in 2020 compared to 2019.

Younger than 25

14%

25-39

13%

40-54

44%

55-69

25%

70+

4%

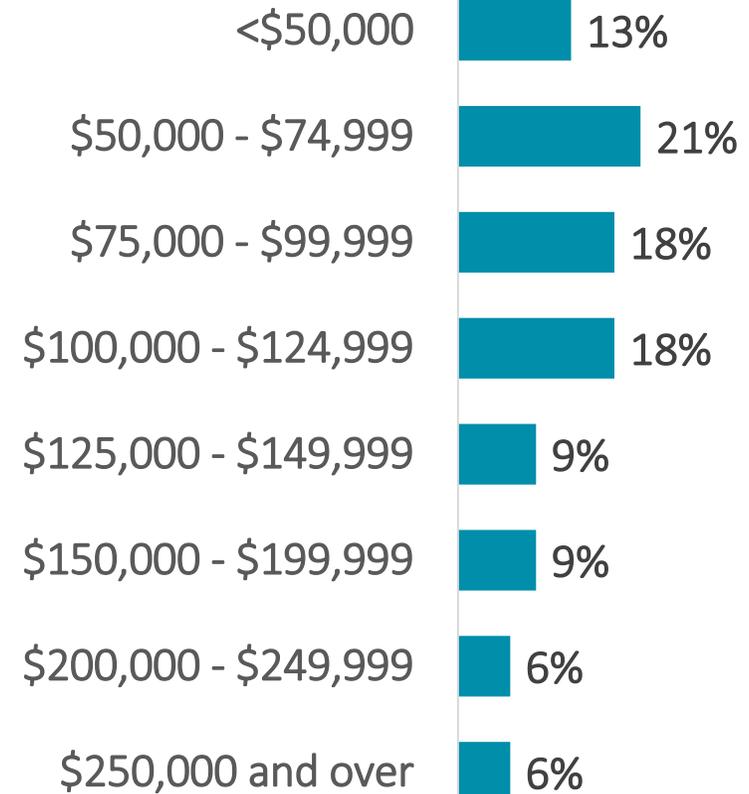
Household Income

Median Household Income

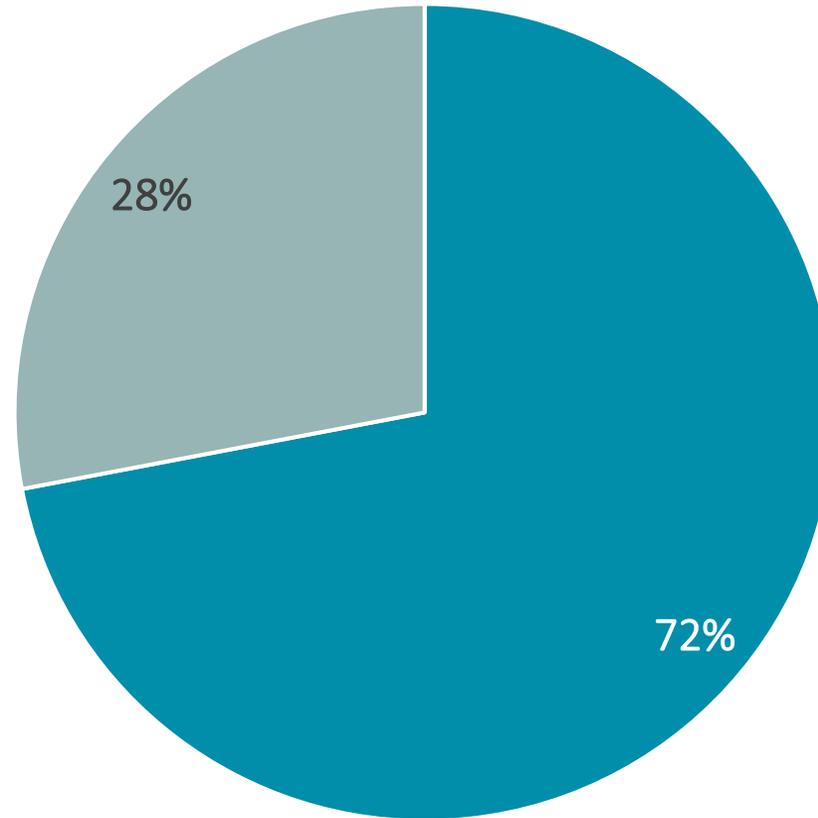
Apr – June visitors had a median household income of **\$97,200**.

Household income distribution for visitors mirrored last year's data.

1 in 8 households earned more than \$200,000.



Marital Status

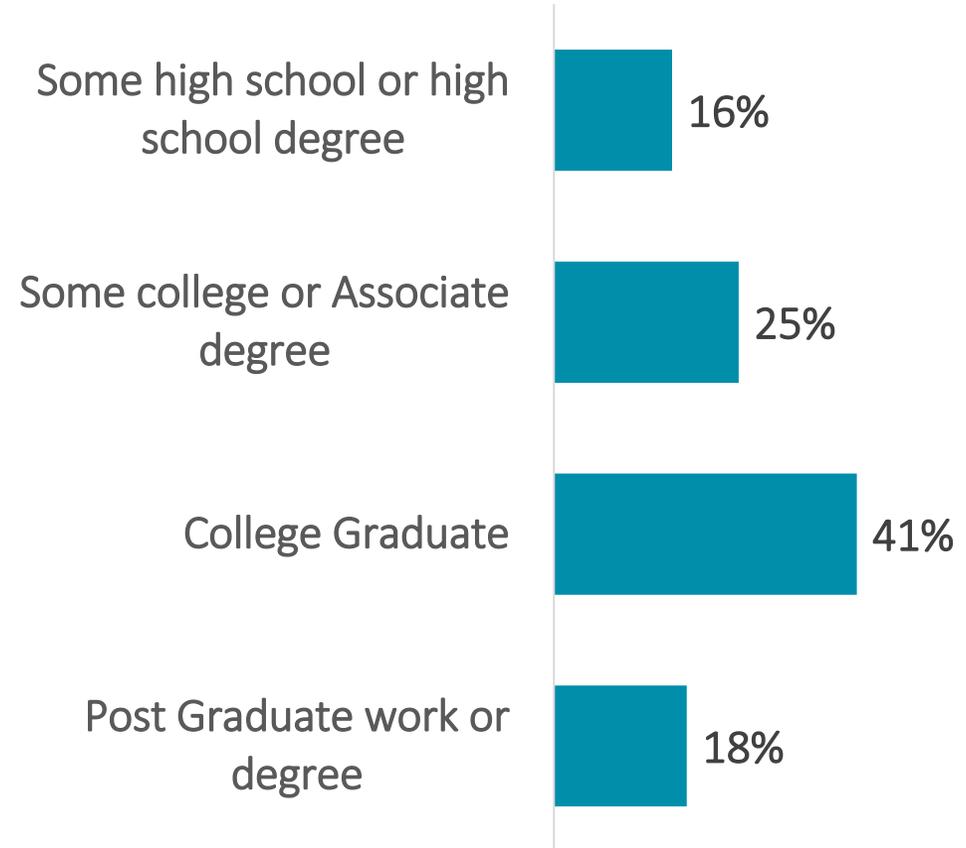


■ Married ■ Single

Education

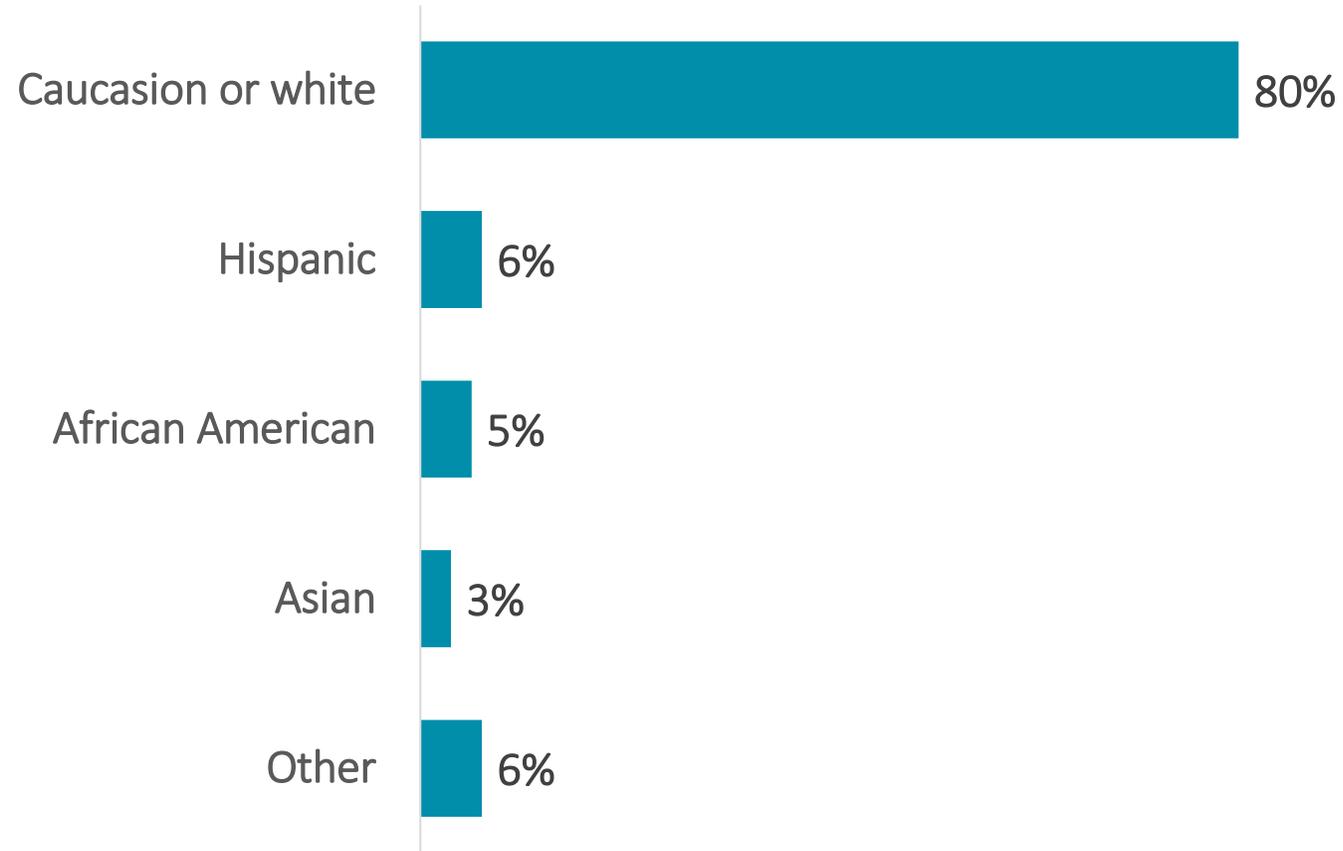
College Education

59% of Apr – June visitors were college graduates – the same as in 2019.

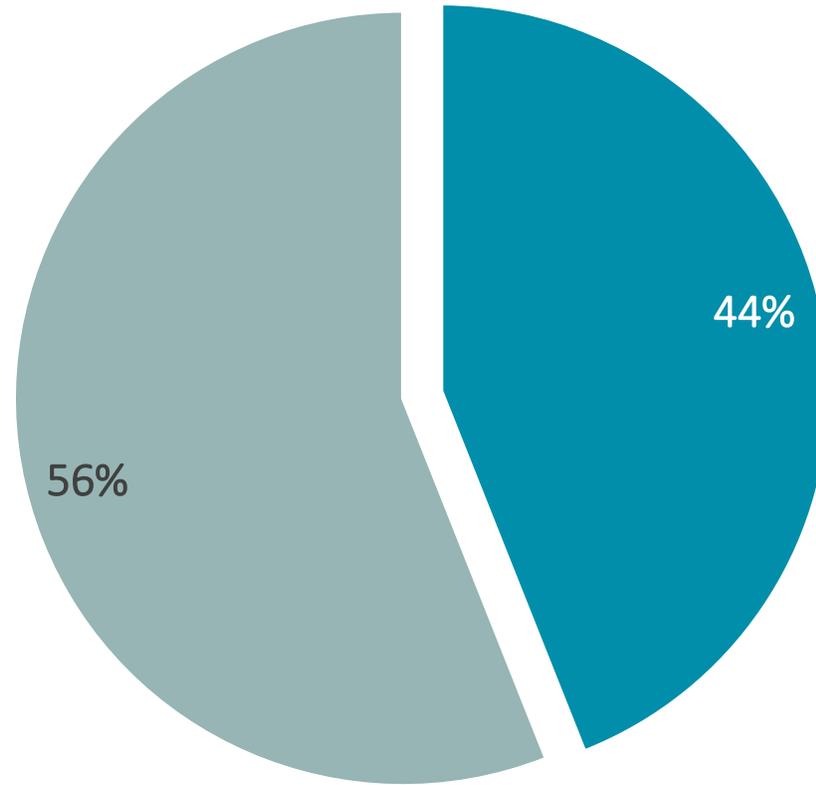


Race/Ethnicity

While The Beaches of Fort Myers and Sanibel visitor was predominately white, the percentage of people of color increased from 12% last year to 20% this year.



Gender



■ Male ■ Female

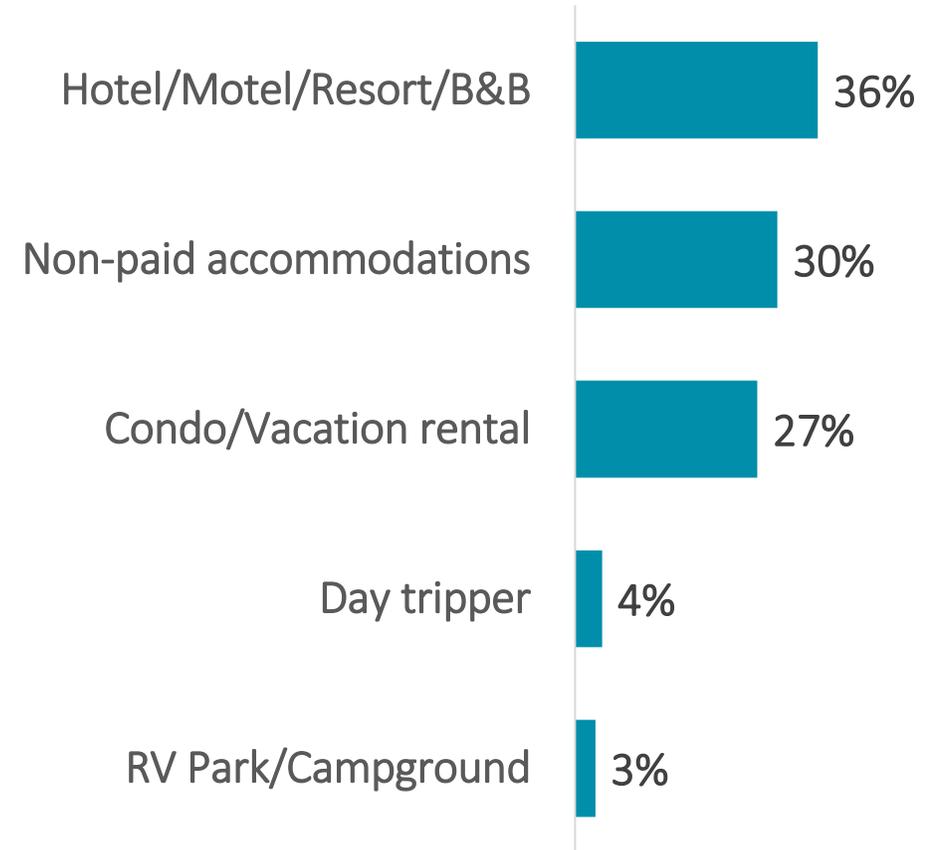
Visitor Journey: Trip Experience



Accommodations

2 in 3 visitors stayed in paid accommodations such as hotels, motels, resorts, B&Bs, condos, vacation rentals, or RV Parks & campgrounds.

Due to vacation rental restrictions, more visitors stayed in hotels this year compared to last.



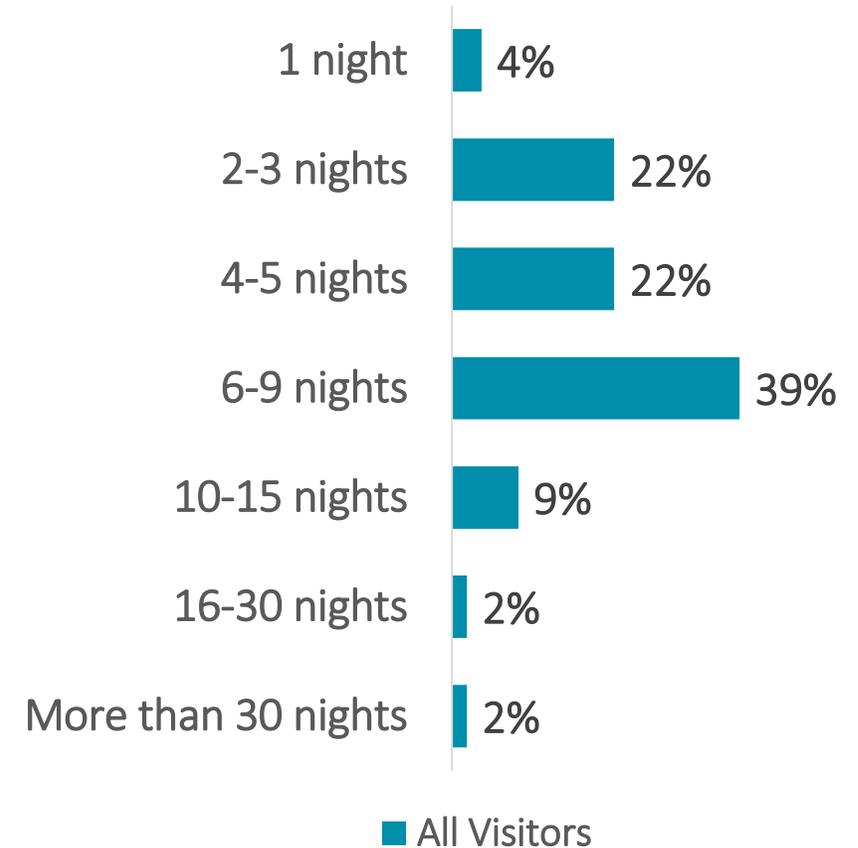
Nights Stayed

All Visitors

Visitors spent **7.8¹** nights in The Beaches of Fort Myers & Sanibel.

Visitors Staying in Paid Accommodations

Visitors staying in paid accommodations spent **6.3²** nights in The Beaches of Fort Myers & Sanibel.



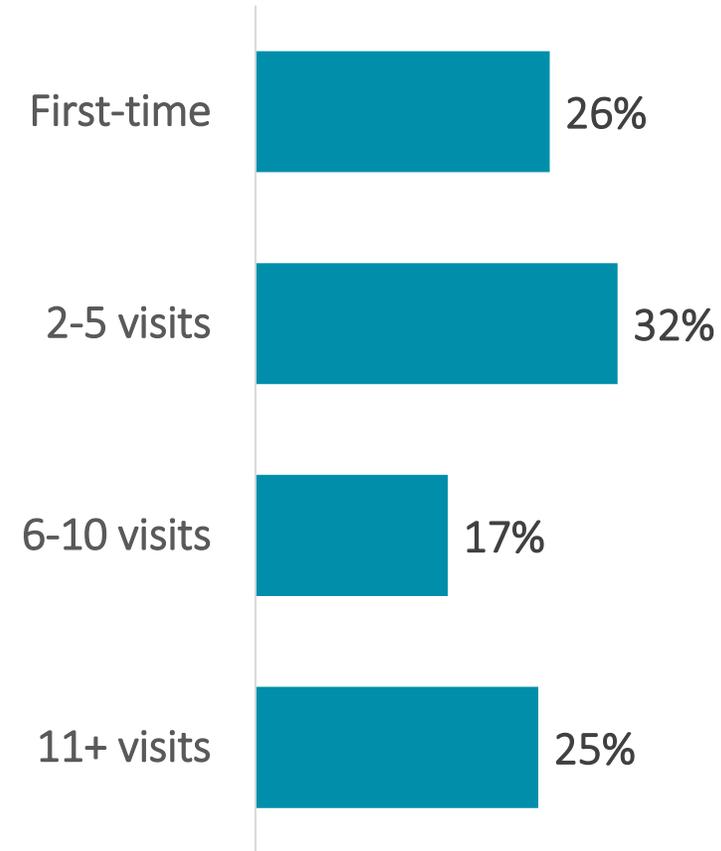
¹When including extended stay visitors, average nights stayed for all visitors was 10.7 nights. Source: Visitor Tracking Survey

²When including extended stay visitors, average nights stayed for visitors staying in paid accommodations was 6.8 nights. Source: Visitor Tracking Survey

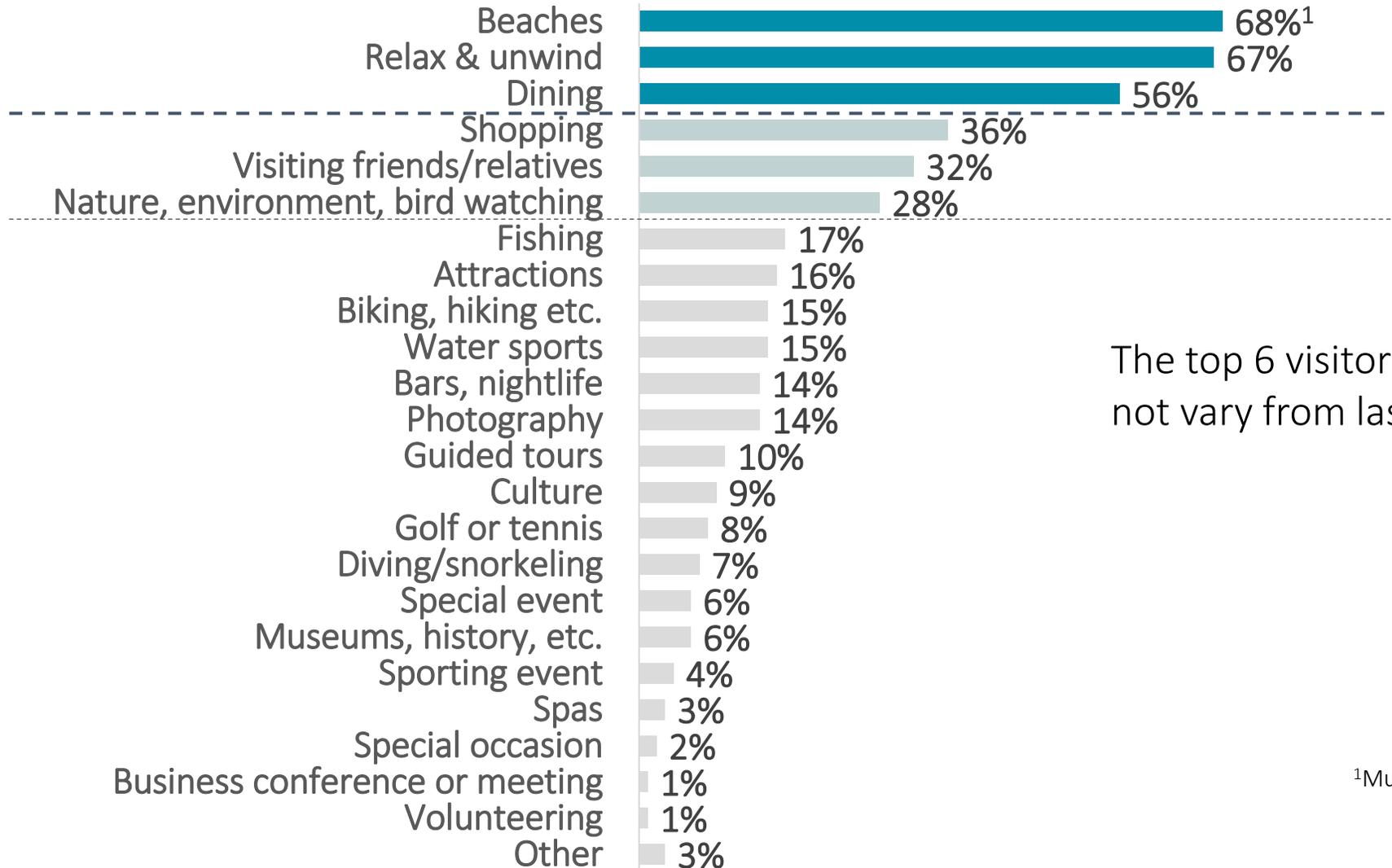
First Time and Experienced Visitors

First Time vs. Repeat Visitors

1 in 4 of visitors had made 11+ visits, while another **1 in 4** were visiting for the first time.



Visitor Activities

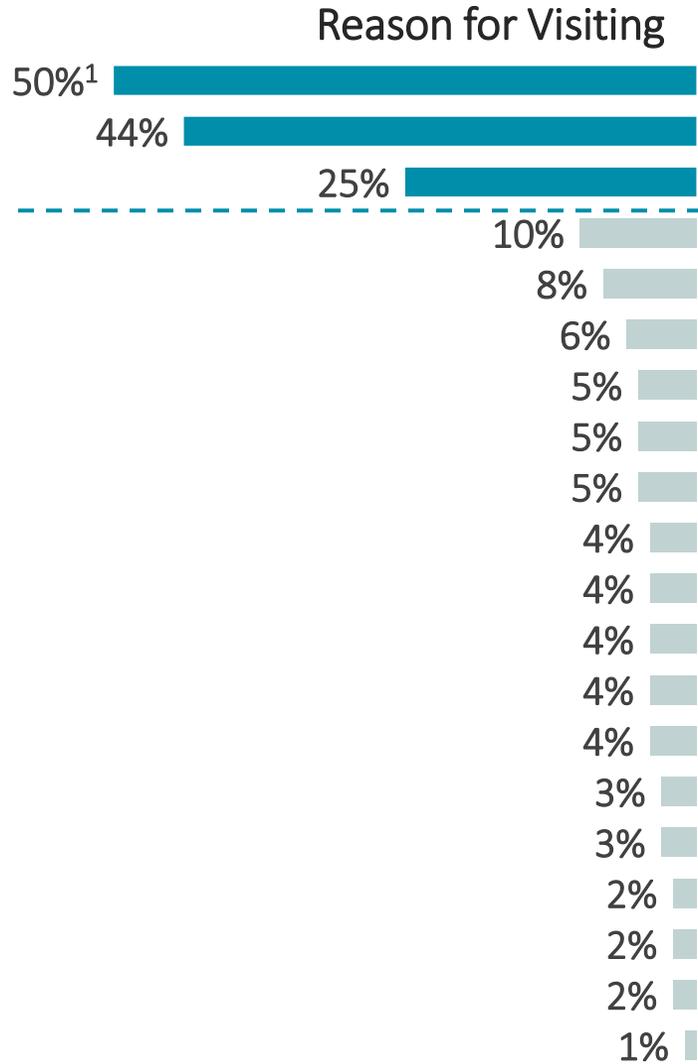


The top 6 visitor activities did not vary from last year.

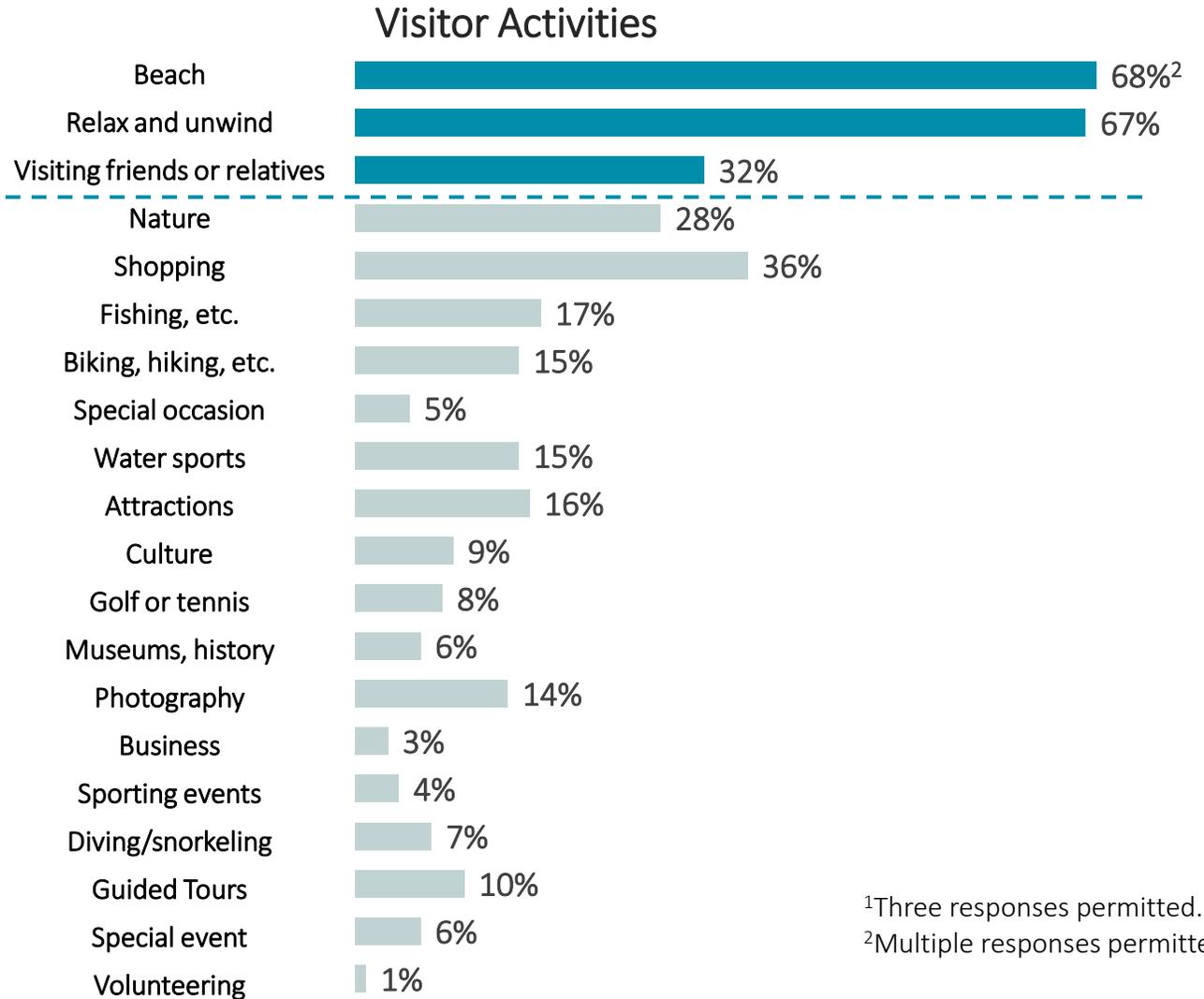
¹Multiple responses permitted.

Reason for Visiting vs. Visitor Activities

Key Reasons for Visiting

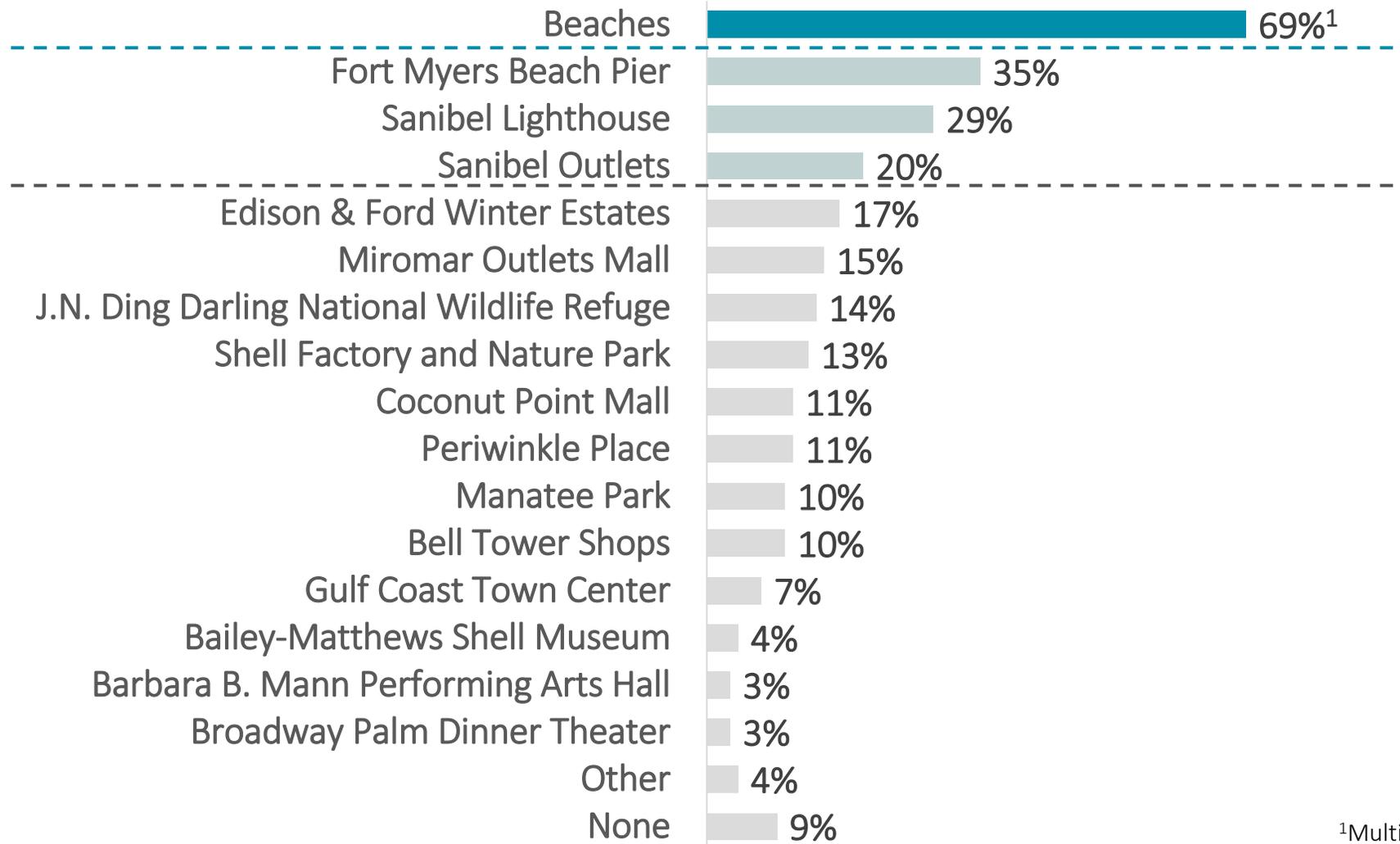


Trip Enhancements



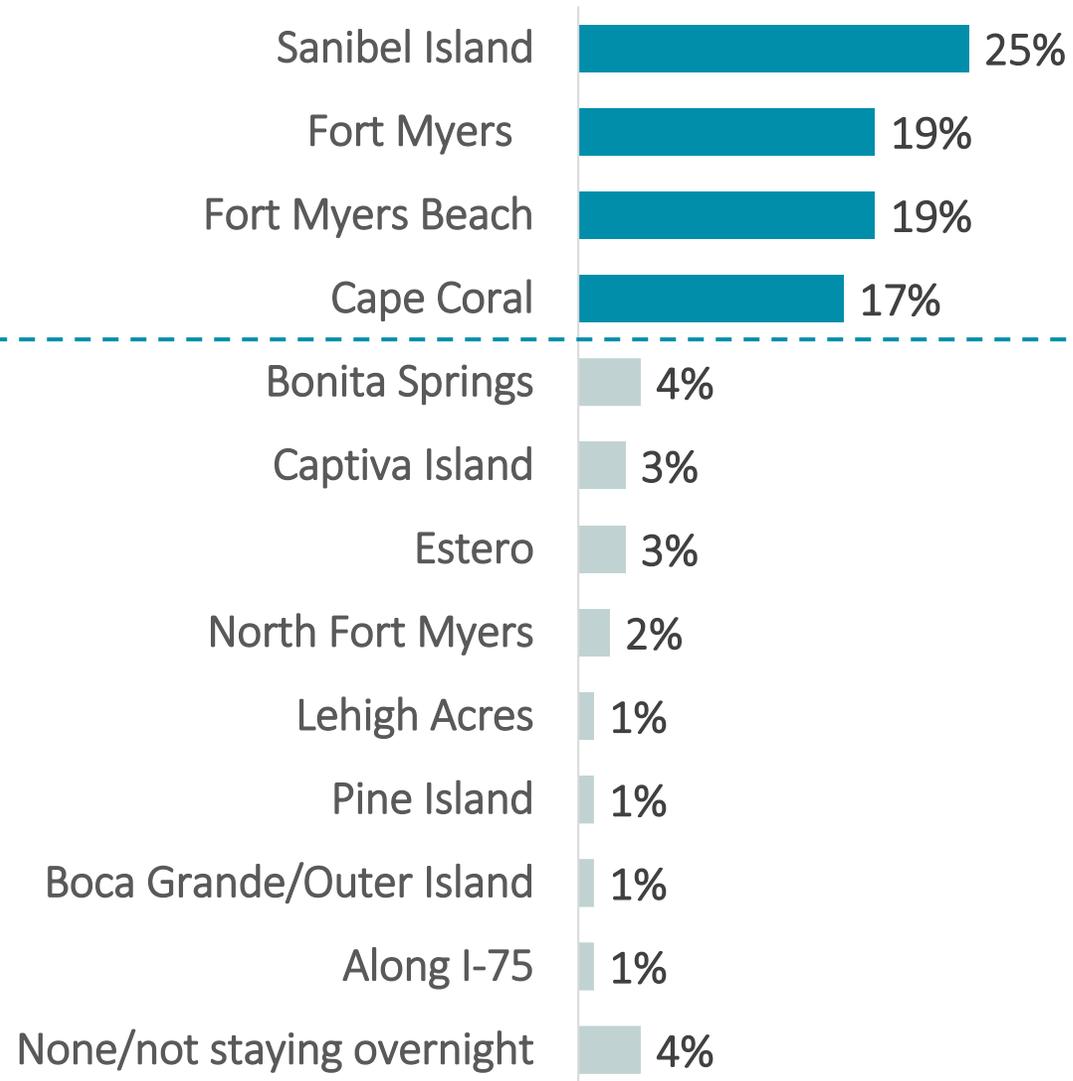
¹Three responses permitted.
²Multiple responses permitted.

Attractions Visited



¹Multiple responses permitted.

Community Stayed

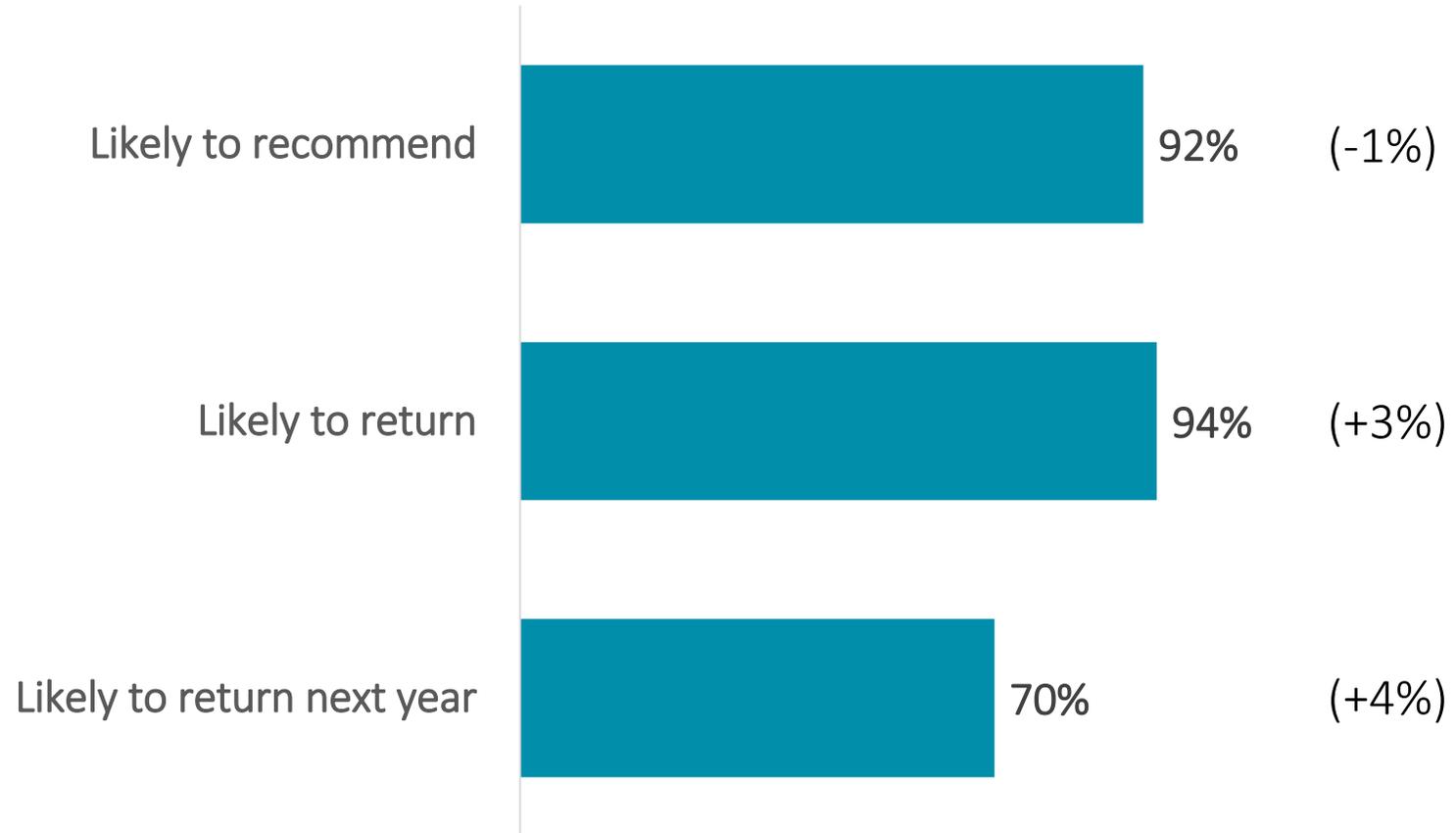


Travel Party Profile
Apr - June 2020

Visitor Journey: Post-Trip Evaluation



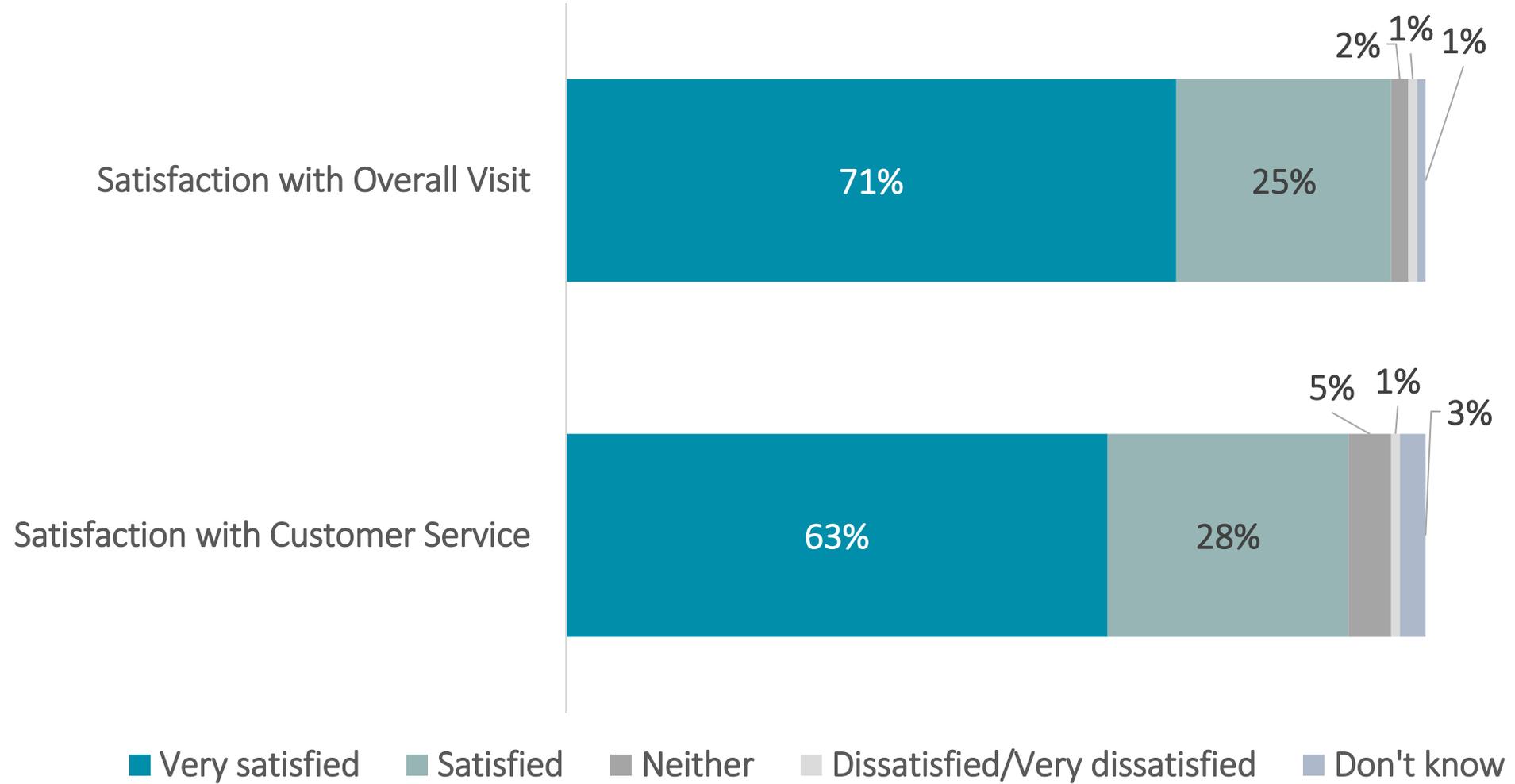
Satisfaction



Satisfaction Ratings

	1 st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2019	2020	2019	2020	2019	2020	2019	2020
Likely to Recommend	90%	92%	95%	93%	93%	93%	91%	86%
Likely to Return	82%	89%	94%	96%	92%	94%	88%	91%
Likely to Return Next Year	43%	48%	72%	78%	66%	70%	66%	60%

Satisfaction



Satisfaction Ratings: Overall Visit

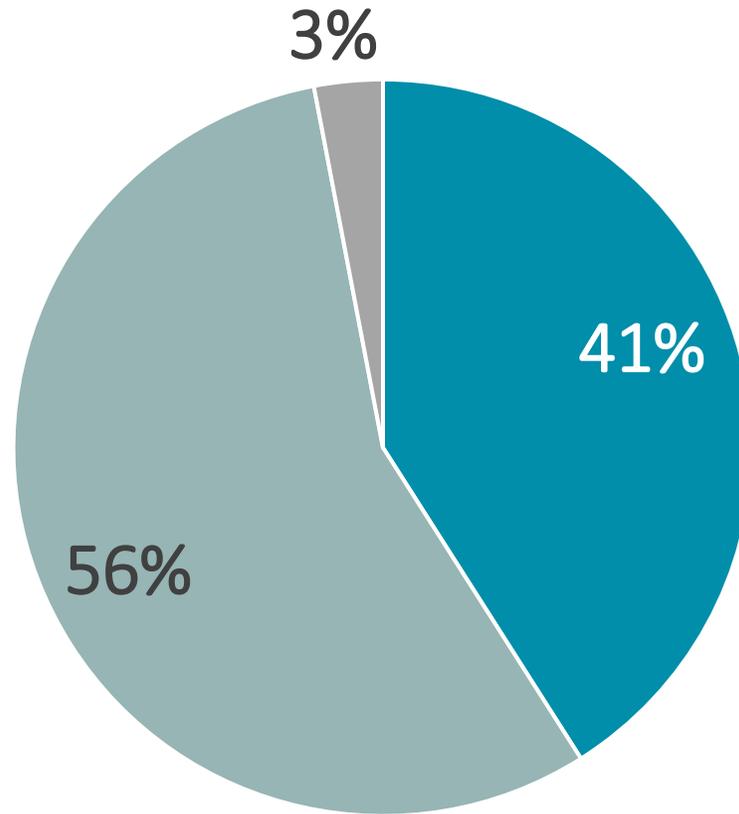
	1 st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2019	2020	2019	2020	2019	2020	2019	2020
Very Satisfied	70%	68%	78%	74%	73%	71%	72%	74%
Satisfied	24%	28%	18%	22%	24%	26%	23%	24%

Satisfaction Ratings: Customer Service

	1 st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2019	2020	2019	2020	2019	2020	2019	2020
Very Satisfied	64%	60%	66%	65%	67%	63%	62%	80%
Satisfied	25%	31%	26%	27%	26%	29%	27%	15%

Satisfaction Ratings: Quality of Accommodations

Quality of Accommodations



Results are identical to last year.

- Far exceeded/exceeded expectations
- Met expectations
- Did not meet/far below expectations

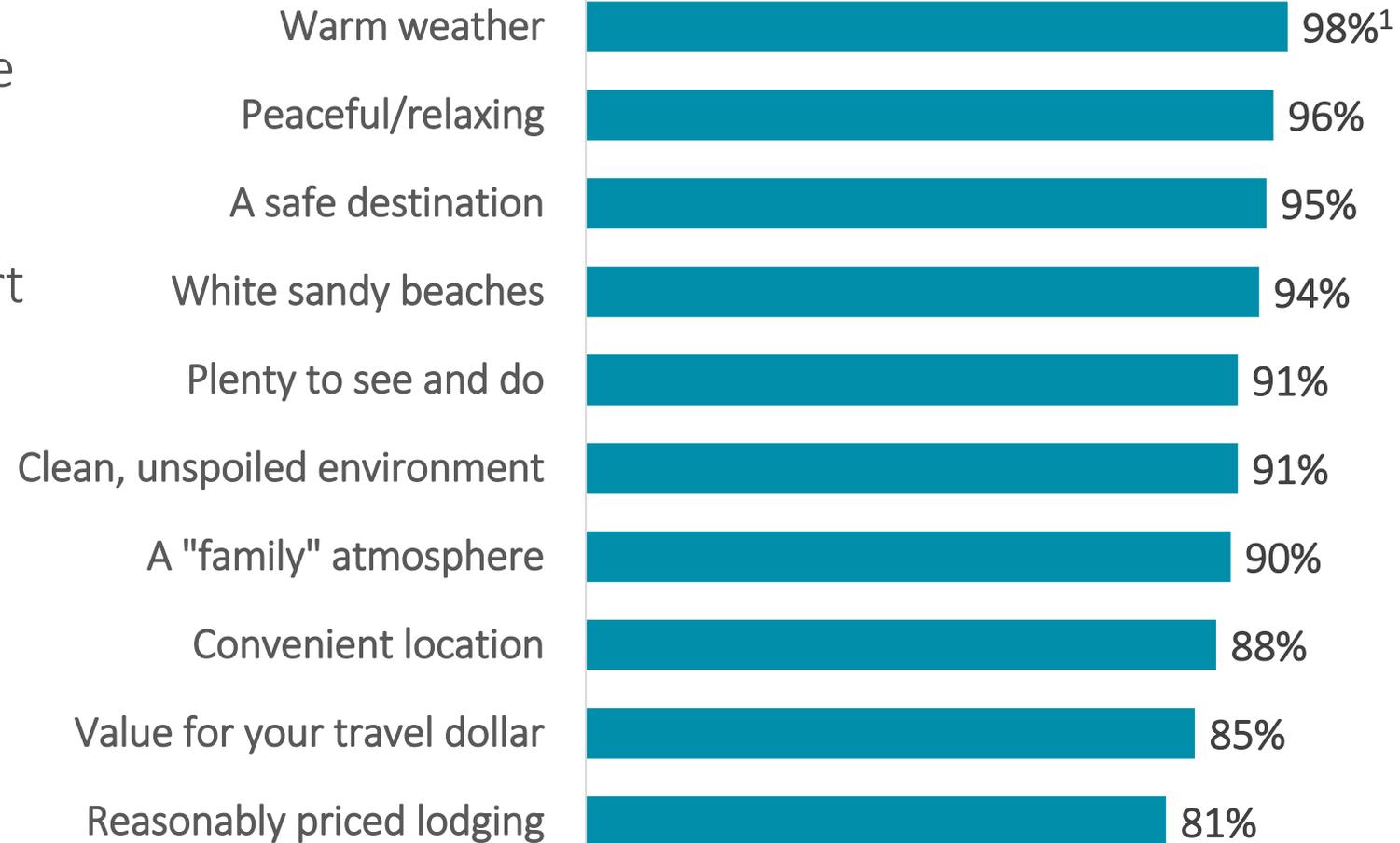
Satisfaction Ratings: Quality of Accommodations

	1 st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2019	2020	2019	2020	2019	2020	2019	2020
Exceeded Expectations	48%	41%	45%	43%	41%	42%	53%	21%
Met Expectations	50%	53%	51%	55%	54%	55%	39%	76%
Did Not Meet Expectations	2%	6%	4%	2%	3%	3%	3%	1%

Attribute Ratings

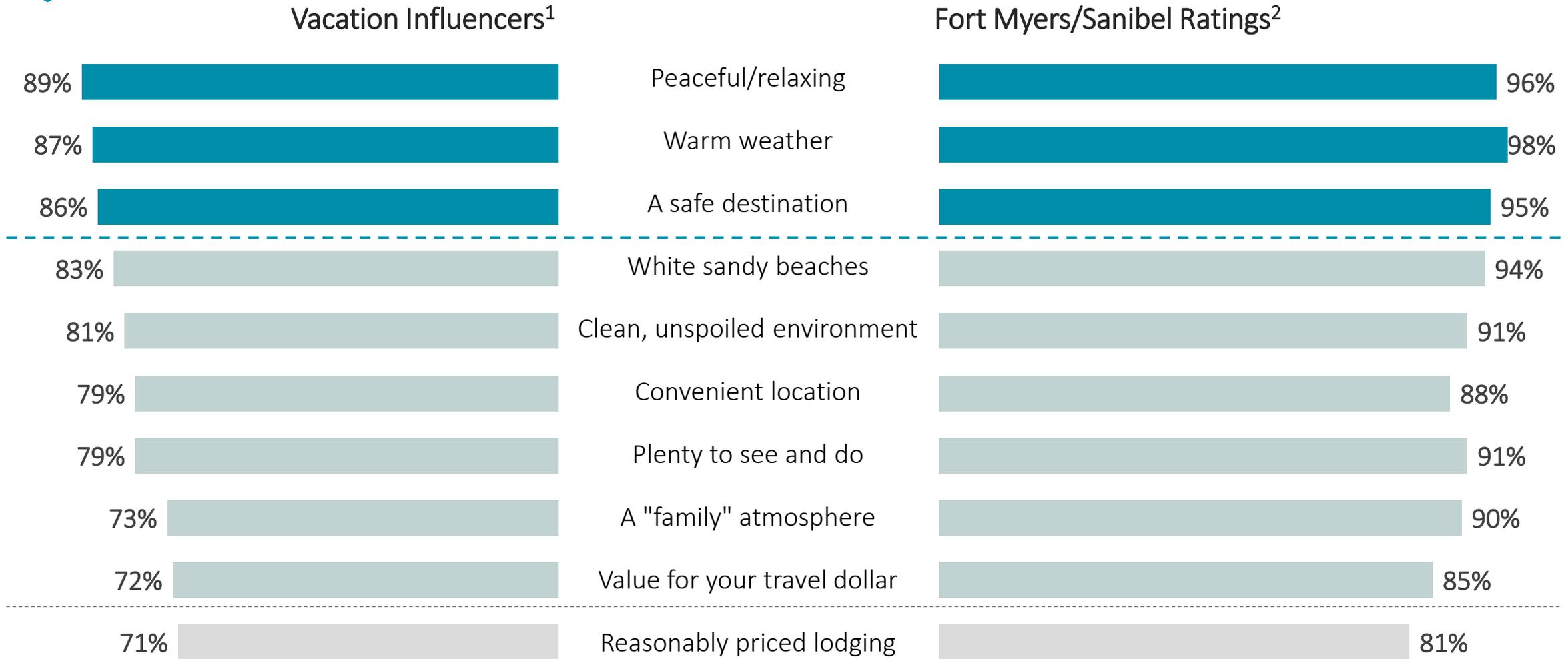
At least **95%** of visitors gave high experience ratings for warm weather, peace, and safety in The Beaches of Fort Myers & Sanibel.

Visitors give the destination high scores on attributes that influence them to come.



¹Top 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



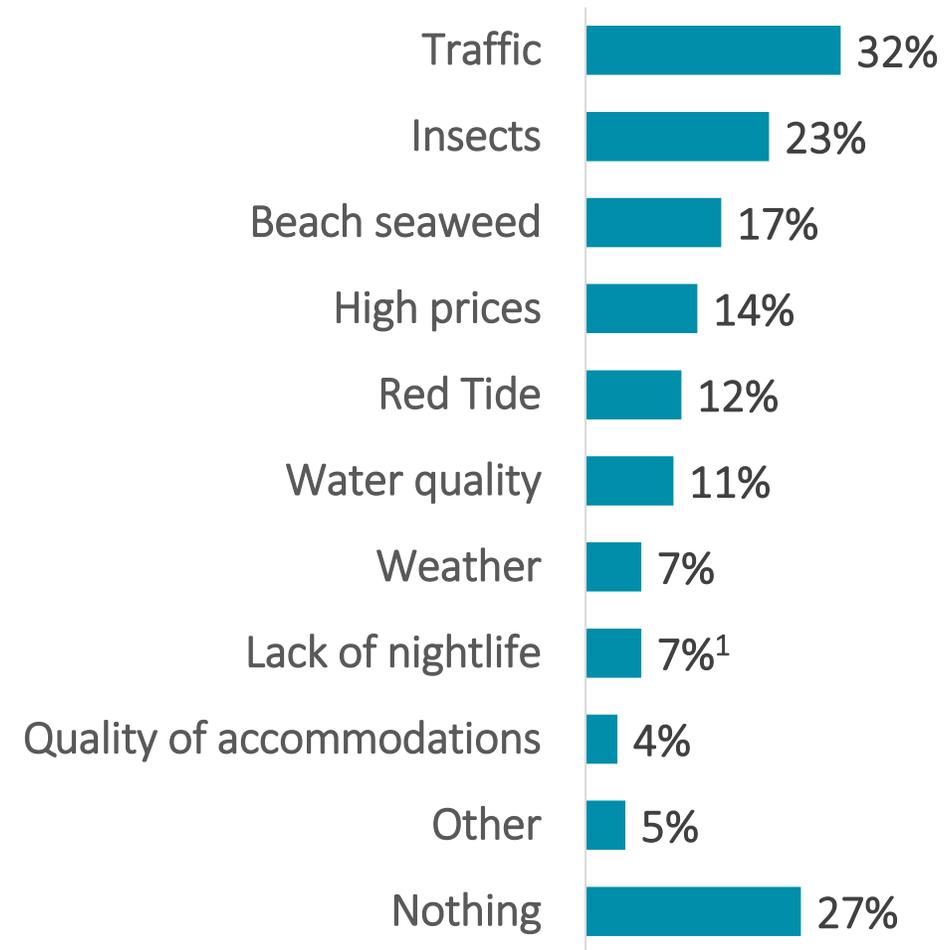
¹Top 2 box scores. Attributes rated on a scale from 1 to 5 where 1 is Not at All Influential and 5 is Definitely Influential.

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

Visitor Concerns

1 in 3 visitors were concerned about traffic.

Insects were mentioned by nearly **1 in 4** visitors.

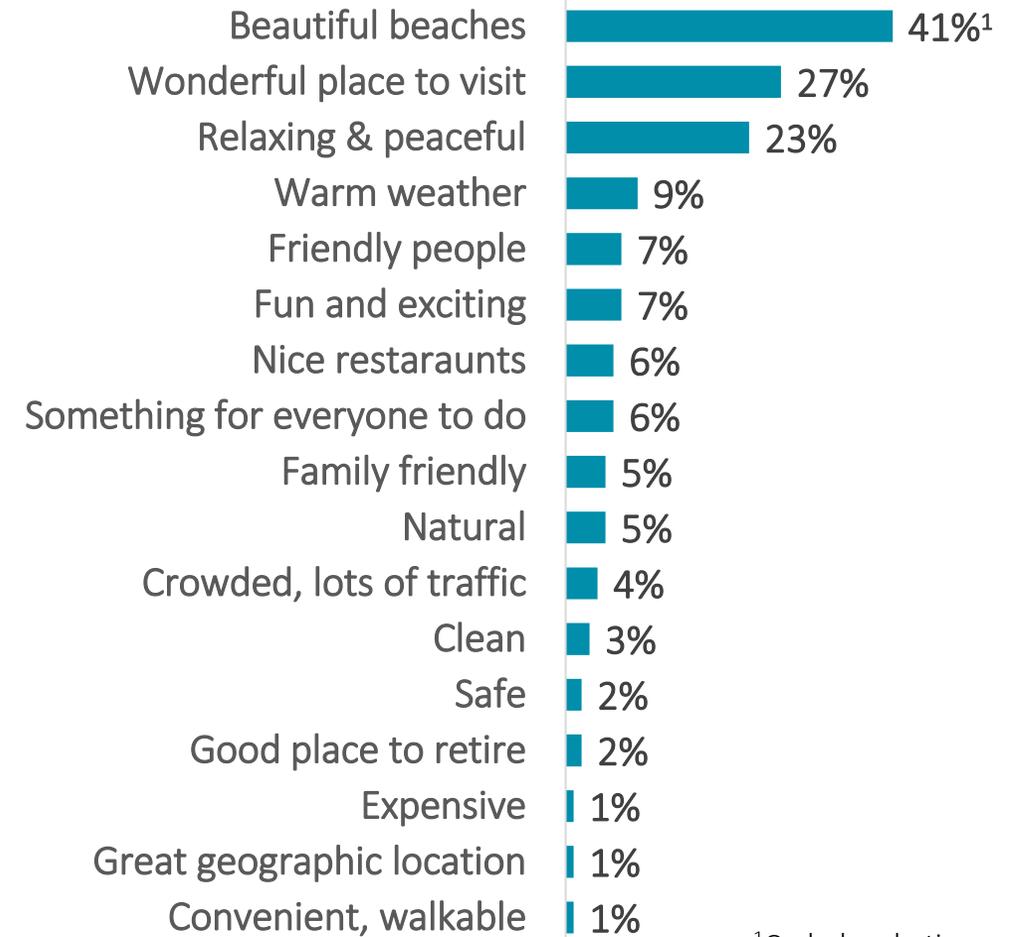


¹Multiple responses permitted.

Area Descriptions

Visitors describe The Beaches of Fort Myers & Sanibel as a **wonderful place to visit** with **beautiful beaches** and a **relaxing and peaceful** atmosphere.

Only 5% had a negative comment in describing the destination.



¹Coded verbatim responses;
multiple responses permitted.

Area Descriptions



Beautiful Beaches

- “A beautiful place with excellent sunsets. Relaxing, do as you feel destination. A wonderful experience.”
- “A beautiful and relaxing area to just enjoy the solitude of the beautiful beaches and water.”
- “There are many beaches to go to that have grainy, white sand and blue/green water. Dolphin sightings are exciting!”



Wonderful Place to Visit

- “A very beautiful area where the weather is great and the beach is beautiful in addition to the wonderful events that happen at night. It is really worth a visit.”
- “I wish to be at the Beaches of Fort Myers and Sanibel at ALL times!”
- “The best place in the world. My home away from home.”
- “We had a wonderful time and can't wait to go back!”

Area Descriptions



Relaxing and Peaceful

- “A peaceful island with no chain restaurants or shops. Just beach.”
- “This place is so relaxing and full of charm, I could forget my stresses and just lived in the moment. The vacation was just amazing.”
- “Most peaceful place I have been in a long time.”
- “Relaxing, natural, plenty to do and see, white sandy beaches, amazing shelling, many great restaurants.”



Warm Weather

- “Nice weather, good environment, great community.”
- “It is beautiful and peaceful. The weather is pleasant. The sand is clean. There are many nice restaurants. There are many places to walk and have romantic moments and memories.”
- “Nice quiet place with great beaches and awesome weather.”

Occupancy Barometer: July – September Reservations

July – Sept Reservations	Apr - June 2019	Apr - June 2020
Up	24%	14%
Same	33%	3%
Down	42%	82%
Not Sure	1%	1%

Occupancy Barometer: October – December Reservations

Oct – Dec Reservations	Apr - June 2019	Apr - June 2020
Up	17%	1%
Same	54%	19%
Down	19%	78%
Not Sure	10%	2%

Year-Over-Year Comparisons



Economic Impact

Visitor & Lodging Statistics	Apr - June 2019	Apr - June 2020	% Change
Visitors	1,262,500	450,200	-64.3%
Room Nights	1,309,000	646,700	-50.6%
Direct Expenditures	\$727,686,800	\$404,396,500	-44.4%
Total Economic Impact	\$1,181,763,400	\$656,739,900	-44.4%
Occupancy	63.6%	36.6%	-42.4%
ADR	\$130.52	\$116.73	-10.6%
RevPAR	\$83.01	\$42.72	-48.5%

Jobs, Wages and Taxes Supported by Tourism

	Apr - June 2019	Apr - June 2020	% Change
Direct Jobs	9,795	5,371	-45.2%
Total Jobs	13,616	7,498	-44.9%
Direct Wages	\$227,418,700	\$120,482,300	-47.0%
Total Wages	\$371,877,000	\$206,300,000	-44.5%
Direct Local Taxes	\$23,213,200	\$12,981,100	-44.1%
Total Local Taxes	\$41,716,300	\$24,036,700	-42.4%
Direct State Taxes	\$51,738,500	\$28,307,800	-45.3%
Total State Taxes	\$77,760,000	\$43,344,800	-44.3%

Visitor Type

Visitor Type	Apr - June 2019	Apr - June 2020
Visitors in Paid Accommodations	62%	66%
Visitors in Non-Paid Accommodations	35%	30%
Day Trippers	3%	4%

Pre-Visit

Planned trip in advance	April – June 2019	Apr - June 2020
1 week or less	7%	9%
2-4 weeks	10%	15%
1-2 months	23%	24%
3-6 months	31%	25%
6 months or more	29%	27%

Considered Other Destinations	Apr - June 2019	Apr - June 2020
Yes	17%	19%
No	83%	81%

Pre-Visit

Trip Planning Websites/Apps ¹	Apr - June 2019	Apr - June 2020
Airline websites/apps	32%	23%
Search engines	19%	23%
Hotel websites/apps	15%	19%
Booking websites/apps	16%	18%
Trip Advisor	16%	16%
Airbnb, VRBO, HomeAway	16%	16%
Visit Florida	5%	15%
Vacation rental websites/apps	11%	14%
www.FortMyers-Sanibel.com	7%	14%
VCB Social Media	4%	12%
Facebook	5%	11%
Travel reviews, blogs, stories, etc.	4%	9%
YouTube, Hulu, Pandora	2%	6%
Instagram	2%	5%

¹Multiple responses permitted.

Pre-Visit

Information Requests ¹	Apr - June 2019	Apr - June 2020
Call hotel/motel/condo	7%	15%
Visitor guide	3%	10%
Fort Myers-Sanibel E-newsletter	1%	9%
Call VCB	2%	8%
Call local Chamber of Commerce	2%	7%
Other	5%	5%
None/Did not request info	82%	71%

¹Multiple responses permitted.

Pre-Visit

Recall of Lee County Promotions	Apr - June 2019	Apr - June 2020
Yes	31%	38%
No	55%	47%
Can't recall	14%	15%
Characteristics influencing decision to visit Lee County (top 2 boxes)	April – June 2019	April – June 2020
Peaceful/relaxing	79%	89%
Warm weather	84%	87%
A safe destination	72%	86%
White sandy beaches	73%	83%
Clean, unspoiled	65%	81%
Convenient location	66%	79%
Plenty to see and do	56%	79%
A "family" atmosphere	58%	73%
Value for your travel dollar	55%	72%
Reasonably priced lodging	48%	71%

Pre-Visit

Transportation	Apr - June 2019	Apr - June 2020
Fly	69%	61%
Drive a personal vehicle	26%	32%
Drive a rental vehicle	2%	4%
Drive a RV	1%	1%
Travel by bus	1%	0%
Other	1%	0%

Airport Used (Base = Visitors who flew)	Apr - June 2019	Apr - June 2020
Southwest Florida International	74%	77%
Punta Gorda	11%	8%
Miami International	5%	5%
Orlando International	3%	3%
Ft. Lauderdale International	3%	3%
Tampa International	3%	2%
Other	1%	1%

Travel Party Profile

Visitor Origin	Apr - June 2019	Apr - June 2020
Florida	9%	14%
Southeast	13%	15%
Northeast	21%	19%
Midwest	36%	35%
West	5%	7%
Canada	4%	4%
United Kingdom	3%	1%
Germany	5%	2%
Other Europe	3%	1%
Other international	1%	1%

Visitor Origin	Apr - June 2019	Apr - June 2020
Miami - Ft. Lauderdale	3%	6%
Minneapolis-Saint Paul	4%	4%
Chicago	5%	4%
New York	4%	4%
Detroit	3%	3%

Travel Party Profile

Travel Parties	Apr - June 2019	Apr - June 2020
Mean travel party size	3.2	3.6 ¹
Travel with children under age 18	29%	30%

Travel Party Composition	Apr - June 2019	Apr - June 2020
Couple	42%	38%
Family	37%	38%
Group of couples/friends	10%	11%
Single	9%	10%
In a tour group	<1%	2%
With business associates	<1%	1%

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

Travel Party Profile

Marital Status	Apr - June 2019	Apr - June 2020
Married	79%	72%
Single	21%	28%

Age	Apr - June 2019	Apr - June 2020
Average age	53	49

Household Income	Apr - June 2019	Apr - June 2020
Median Income	\$94,400	\$97,200

Trip Experience

Length of Stay	Apr - June 2019	Apr - June 2020
Average nights in The Beaches of Fort Myers & Sanibel	7.4	7.8

First time/Repeat Visitors	Apr - June 2019	Apr - June 2020
First-time	25%	26%
Repeat	75%	74%

Trip Experience

Activities ¹	April – June 2019	April – June 2020
Beaches	78%	68%
Relax & unwind	77%	67%
Dining	64%	56%
Shopping	42%	36%
Visiting friends/relatives	36%	32%
Nature, environment, bird watching	31%	28%
Fishing	15%	17%
Attractions	19%	16%
Biking, hiking etc.	20%	15%
Water sports	14%	15%
Bars, nightlife	17%	14%
Photography	16%	14%
Guided tours	6%	10%
Culture	8%	9%
Golf or tennis	10%	8%
Diving/snorkeling	4%	7%
Special event	9%	6%
Museums, history, etc.	9%	6%
Special occasion	3%	5%
Sporting event	4%	4%
Spas	4%	3%
Business conference or meeting	2%	3%
Volunteering	1%	1%
Other	4%	3%

¹Multiple responses permitted.

Trip Experience

Attractions ¹	Apr - June 2019	Apr - June 2020
Beaches	75%	69%
Fort Myers Beach Pier	37%	35%
Sanibel Lighthouse	32%	29%
Sanibel Outlets	19%	20%
Edison & Ford Winter Estates	24%	17%
Miromar Outlets Mall	20%	15%
J.N. Ding Darling National Wildlife Refuge	14%	14%
Shell Factory and Nature Park	8%	13%
Periwinkle Place	12%	11%
Coconut Point Mall	9%	11%
Bell Tower Shops	8%	10%
Manatee Park	5%	10%
None	14%	9%
Gulf Coast Town Center	6%	7%
Bailey-Matthews Shell Museum	3%	4%
Other	5%	4%
Broadway Palm Dinner Theater	3%	3%
Barbara B. Mann Performing Arts Hall	2%	3%

¹Multiple responses permitted.

Trip Experience

Area stayed	Apr - June 2019	Apr - June 2020
Sanibel Island	21%	25%
Fort Myers	22%	19%
Fort Myers Beach	18%	18%
Cape Coral	18%	17%
None/not staying overnight	5%	4%
Bonita Springs	5%	4%
Captiva Island	3%	3%
Estero	2%	3%
North Fort Myers	2%	2%
Lehigh Acres	1%	1%
Pine Island	1%	1%
Boca Grande/Outer Island	1%	1%
Along I-75	1%	1%

Post-Trip Evaluation

Loyalty metrics	Apr - June 2019	Apr - June 2020
Likely to recommend	94%	92%
Likely to return	92%	94%
Likely to return next year	73%	70%

Satisfaction with Accommodations	Apr - June 2019	Apr - June 2020
Exceeded expectations	40%	41%
Met expectations	57%	56%
Did not meet expectations	3%	3%

Post-Trip Evaluation

Satisfaction with Visit	Apr - June 2019	Apr - June 2020
Very satisfied	80%	71%
Satisfied	16%	25%
Neither	2%	2%
Dissatisfied/Very dissatisfied	1%	1%
Don't know	1%	1%

Satisfaction with Customer Service	Apr - June 2019	Apr - June 2020
Very satisfied	78%	63%
Satisfied	17%	28%
Neither	2%	5%
Dissatisfied/Very dissatisfied	1%	1%
Don't know	2%	3%

Post-Trip Evaluation

Visitor Concerns ¹	Apr - June 2019	Apr - June 2020
Traffic	33%	32%
Nothing	27%	27%
Insects	18%	23%
Beach seaweed	23%	17%
High prices	11%	14%
Red Tide	13%	12%
Water quality	10%	11%
Weather	1%	7%
Lack of nightlife	3%	7%
Other	5%	5%
Quality of accommodations	1%	4%
No concerns	27%	27%

¹Multiple responses permitted.

Methodology



Methodology

- Economic Impact of tourism in Lee County is derived from:
 - Visitor Tracking Study
 - Internet survey & in-person interviews in public areas, hotels, & at events around Lee County¹
 - Sample size: 740 completed interviews
 - Target individuals: April – June visitors to Lee County
 - Data Collection: April 2020 – June 2020
 - Occupancy Study
 - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc., and the STR Report
 - Sample Size – data from 9,161 hotel/rental/campground units (95 properties) reporting to DSG, and 9,681 hotel units reporting to STR (81 properties)
 - 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
- TDT collections provided by the Lee County VCB
- Tourism database at Downs & St. Germain Research

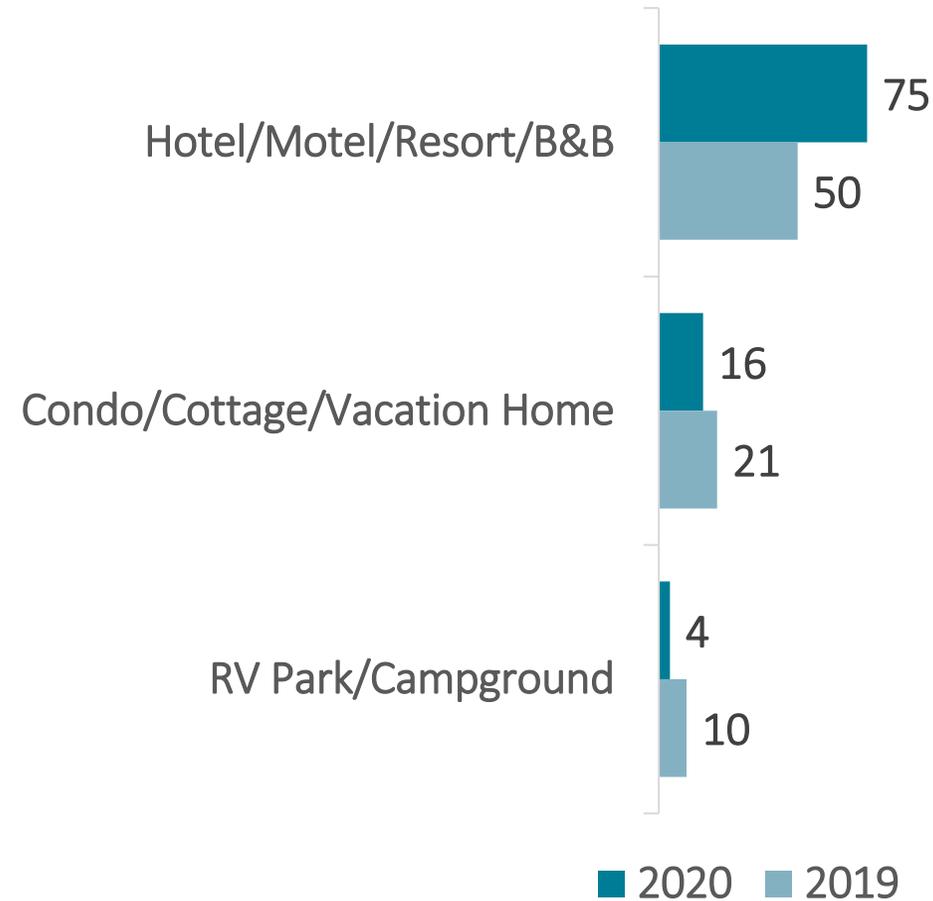
¹No in-person interviews were conducted in April or May due to COVID-19.

Methodology

- **Occupancy Study**

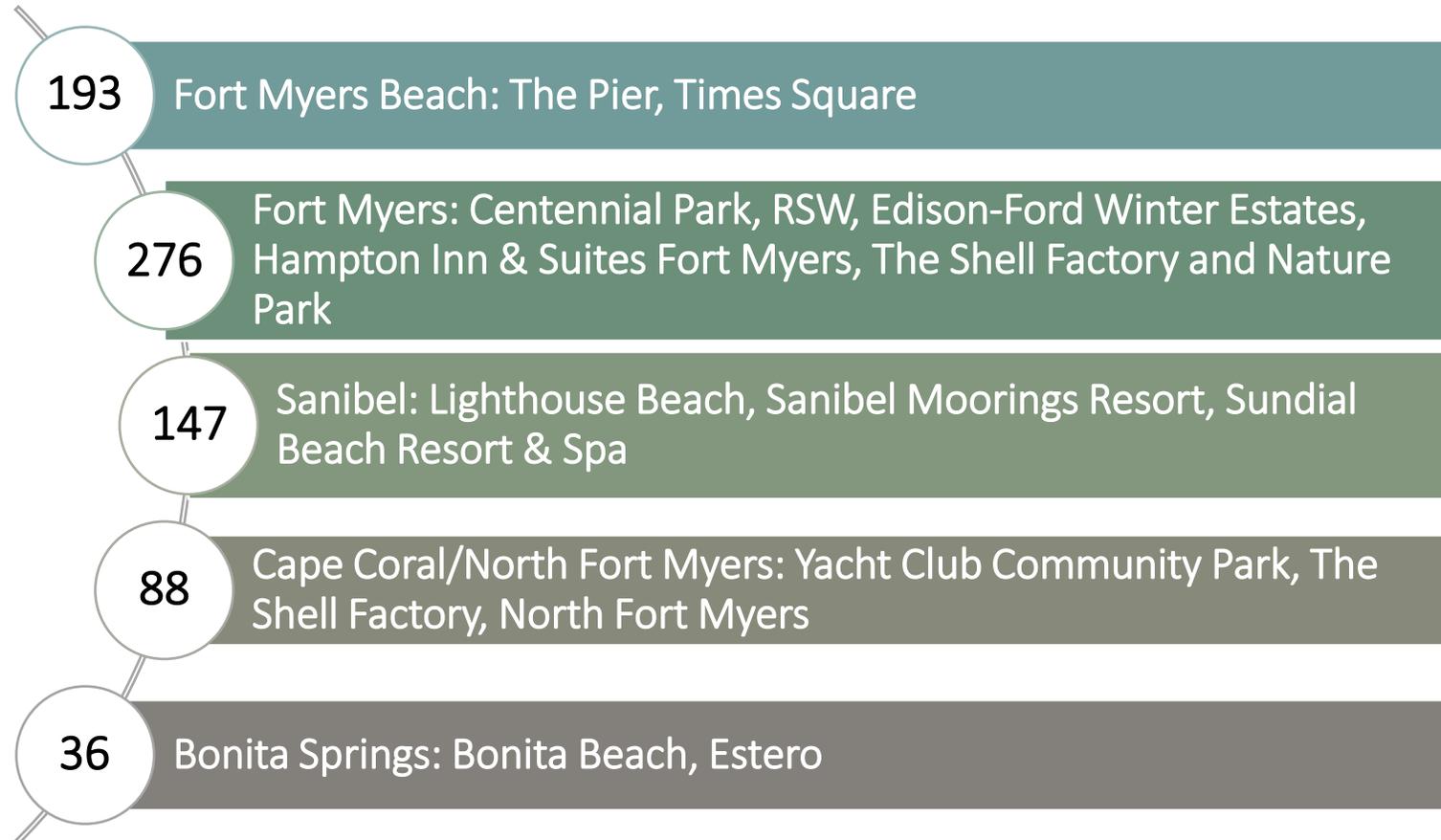
- Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc.
 - Sample Size – 95 completed interviews
 - Data Collection: July 2020 (for April - June 2020)
- Total Sample Size – data from 9,161 hotel/rental/campground units reporting to DSG and 9,681 hotel units reporting to STR (representing 81 properties)

Number of Interviews



Methodology

- **740** visitor interviews were completed in the following areas:



The Beaches of Fort Myers & Sanibel

Lee County VCB

Apr - June 2020

Visitor Tracking & Occupancy Study

Tamara Pigott, CDME
Executive Director

Phillip Downs, Ph.D.
Joseph St. Germain, Ph.D.
Rachael Anglin
Downs & St. Germain Research

