The Beaches of Fort Myers & Sanibel

Lee County VCB

April – June 2021

Visitor Tracking, Occupancy & Economic Impact Study

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THE BEACHES OF FORT MYERS AND SANIBEL

downs & st. germain RESEARCH

Introduction

STUDY OBJECTIVES: MAP THE VISITOR JOURNEY

Pre-Visit

- Planning cycle
- Planning sources
- Information requests
- Other destinations considered
- Trip influencers
- Reasons for visiting
- Exposure to promotions
- Booking
- Mode of transportation

Travel Party Profile

- Visitor origin
- Party size
- Party composition
- Demographics

Trip Experience

- Accommodations
- Length of stay
- Number of times in destination
- Activities in destination
- Attractions visited
- Area stayed

Post-Trip Evaluation

- Likelihood of recommending
- Likelihood of returning
- Satisfaction with overall stay & customer service
- Evaluation of destination attributes
- Visitor concerns
- Painting a picture for others

Economic Impact on Destination

- Number of visitors
- Expenditures
- Economic impact
- Room nights generated
- Occupancy, ADR, RevPAR
- Jobs, wages and taxes supported by tourism

Executive Summary

QUARTERLY SNAPSHOT

- Tourism is booming, with all economic impact metrics now **exceeding pre-pandemic levels**
- More visitors **traveled as a family** to The Beaches of Ft. Myers and Sanibel this quarter compared to 2020
- More April – June 2021 visitors flew to the Beaches of Fort Myers and Sanibel via **RSW**
- April – June 2021 visitors were more likely to stay in **paid accommodations**
- April – June 2021 visitors **stayed longer**

74.8%	$160.77	$120.33
OCCUPANCY RATE	**AVERAGE DAILY RATE**	**REVENUE PER ROOM**
↑ 17.6% from 2019	↑ 23.2% from 2019	↑ 45.0% from 2019

THE BEACHES OF FORT MYERS AND SANIBEL

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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 2020 VS. 2021

Visitor & Lodging Statistics	Apr – June 2020	Apr – June 2021	% Change '20-'21
Visitors	450,200	1,309,300	+190.8%
Room Nights	646,700	1,766,300	+173.1%
Direct Expenditures[1]	$404,396,500	$996,169,300	+146.3%
Total Economic Impact[2]	$656,739,900	$1,587,893,900	+141.8%[3]

[1]Includes: accommodations, restaurants, entertainment, shopping, transportation, groceries, and "other" expenses.
[2]Economic impact includes indirect and induced effects of visitor spending. Indirect effects are increased business spending resulting from tourism dollars. Induced effects are increased household
[3]As of January 2021, the IMPLAN multiplier used to estimate economic impact is 1.594.

TOURISM SNAPSHOT: KEY METRICS APR – JUNE 2019 VS. 2021

Visitor & Lodging Statistics	Apr – June 2019	Apr – June 2021	% Change '19-'21
Visitors	1,262,500	1,309,300	+3.7%[1]
Room Nights	1,309,000	1,766,300	+34.9%[1]
Direct Expenditures[2]	$727,686,800	$996,169,300	+36.9%[1]
Total Economic Impact[3]	$1,181,763,400	$1,587,893,900	+34.4%[4]

[1]The year-over-year increase in room nights and visitor spending is higher than the increase in the number of visitors due to the increase in the percentage of visitors staying in paid accommodations and their longer length of stay in April – June 2021, increased number of rental units available in 2021, and increased visitor spending in 2021 on almost every category of spending, e.g., accommodations, restaurants, shopping, etc.
[2]Includes: accommodations, restaurants, entertainment, shopping, transportation, groceries, and "other" expenses.
[3]Economic impact includes indirect and induced effects of visitor spending. Indirect effects are increased business spending resulting from tourism dollars. Induced effects are increased household spending resulting from tourism dollars.
[4]As of January 2021, the IMPLAN multiplier used to estimate economic impact is 1.594.

TOURISM SNAPSHOT: KEY METRICS FOR THE CALENDAR YEAR

Visitor & Lodging Statistics	CY 2019	CY 2020	CY 2021	% Change '19-'21
Visitors	2,574,400	1,541,500	2,223,100	-13.6%[1]
Room Nights	3,157,200	2,246,000	3,320,800	+5.2%[1]
Direct Expenditures[2]	$1,979,515,400	$1,487,181,700	$2,002,782,300	+1.2%[1]
Total Economic Impact[3]	$3,214,733,000	$2,415,183,100	$3,192,435,000	-0.7%[4]

[1]The year-over-year increase in room nights and visitor spending is higher than the increase in the number of visitors due to the increase in the percentage of visitors staying in paid accommodations and their longer length of stay, increased number of rental units available in 2021, and increased visitor spending in 2021 on almost every category of spending, e.g., accommodations, restaurants, shopping, etc.
[2]Includes: accommodations, restaurants, entertainment, shopping, transportation, groceries, and "other" expenses.
[3]Economic impact includes indirect and induced effects of visitor spending. Indirect effects are increased business spending resulting from tourism dollars. Induced effects are increased household spending resulting from tourism dollars.
[4]As of January 2021, the IMPLAN multiplier used to estimate economic impact is 1.594.

APRIL – JUNE LODGING STATISTICS

74.8%	$160.77	$120.33
Occupancy	ADR	RevPAR
↑ 17.6%	↑ 23.2%	↑ 45.0%
From 2019	From 2019	From 2019

VISITOR JOURNEY: PRE-VISIT

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

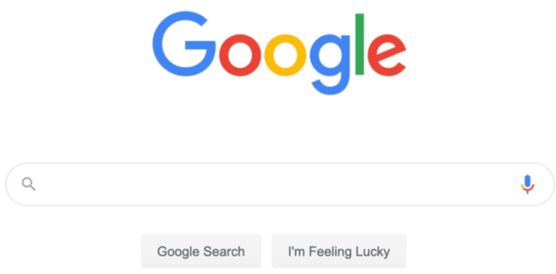
TRIP PLANNING

- Over half of visitors planned their trips to The Beaches of Fort Myers & Sanibel at least 3 months in advance
- Nearly 2 in 5 visitors requested information from hotels, the VCB, etc., to plan their trips
  - 1 in 4 called a hotel/motel/condo when planning their trips
- 25% of visitors considered choosing other destinations when planning their trips

TRIP PLANNING: WEBSITES/APPS USED

- Over 4 in 5 visitors used websites and apps to plan their trips to The Beaches of Fort Myers & Sanibel
- Top websites and apps used to plan their trips include[1]:

32% Airbnb, VRBO, HomeAway



30% Search engines

26% Airline websites/apps

21% Vacation Rental websites/apps

[1]Multiple responses permitted.

TOP TRIP INFLUENCERS

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

95% Peaceful/relaxing

92% Warm weather

91% 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 Beaches of Fort Myers & Sanibel include[1]:

56% Vacation

56% Beach

45% Relax & unwind

16% Visit friends & relatives

[1]Three responses permitted.

PROMOTIONS

- 41% of visitors recalled promotions in the past 6 months for The Beaches of Fort Myers & Sanibel
- Top sources of recall include[1]:

40% Social media

39% Internet

[1]Multiple responses permitted.

BOOKING

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

49% Directly with hotel/condo

15% VRBO, HomeAway

14% Airbnb

TRANSPORTATION

- 77% of visitors flew to The Beaches of Fort Myers & Sanibel
- 62% of all visitors traveled to Ft. Myers via RSW

VISITOR JOURNEY: TRAVEL PARTY PROFILE

Pre-Visit

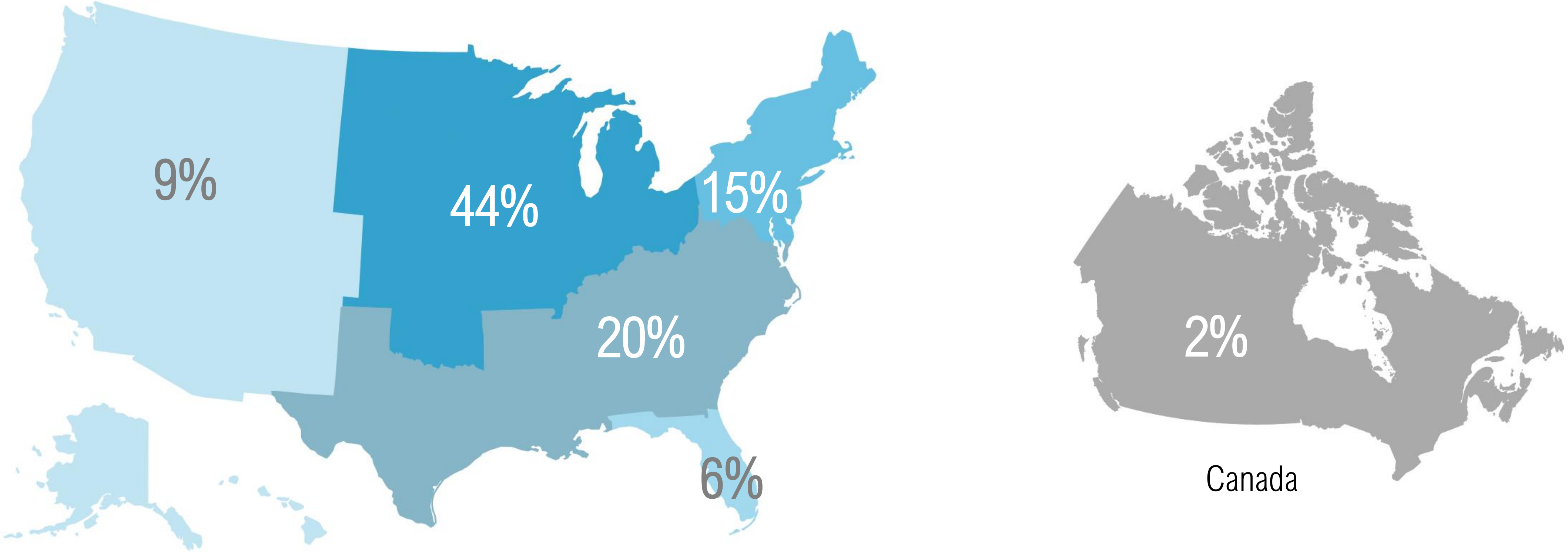
Travel Party Profile

Trip Experience

Post-Trip Evaluation

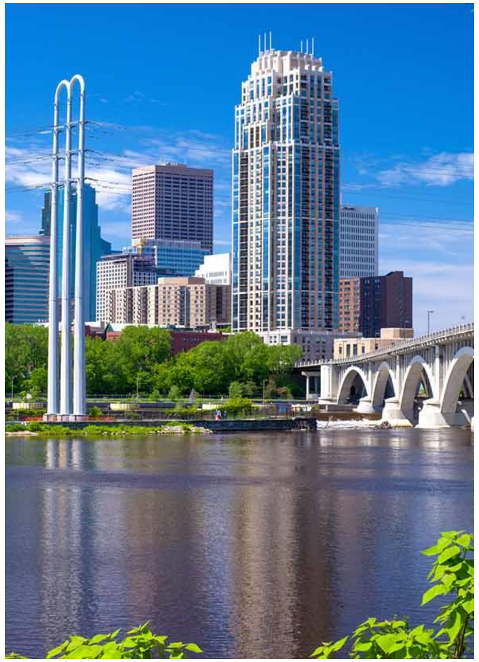
Economic Impact on Destination

ORIGIN



US = 94%

TOP ORIGIN MARKETS



5% Minneapolis-
St. Paul

5% Chicago

5% Columbus

TRAVEL PARTY SIZE AND COMPOSITION

- Visitors traveled in a party composed of 3.8 people[1]
- 39% traveled with children under the age of 18
- 47% traveled as a family, while 33% of visitors traveled as a couple

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

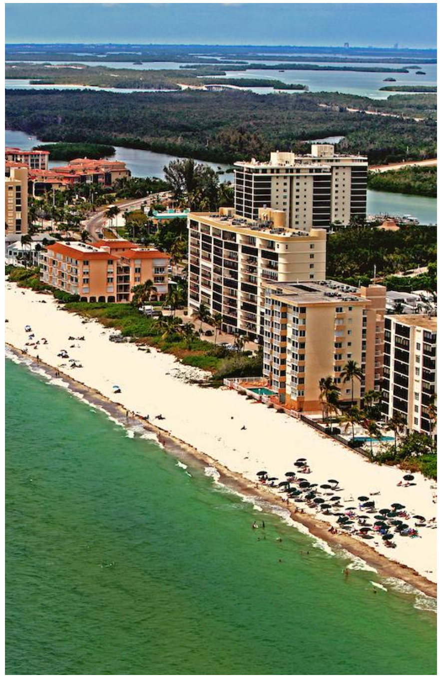
DEMOGRAPHIC PROFILE

Apr – June Visitors:

- Average age of 50 years old
- Median household income of $104,400
- Married (76%)
- College educated (64%)
- Caucasian/white (77%)
- Slightly more likely to be female (52%)

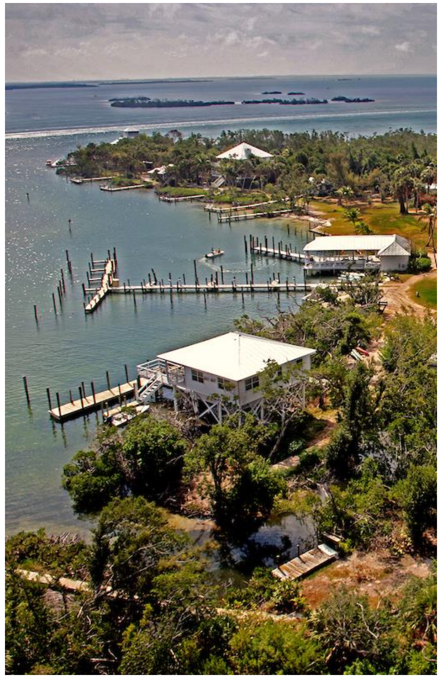
Visitor Journey: Trip Experience

ACCOMMODATIONS

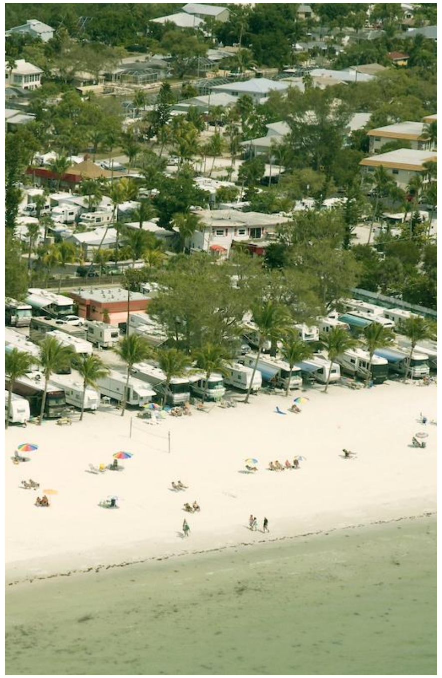


42% Condo/Vacation Rental

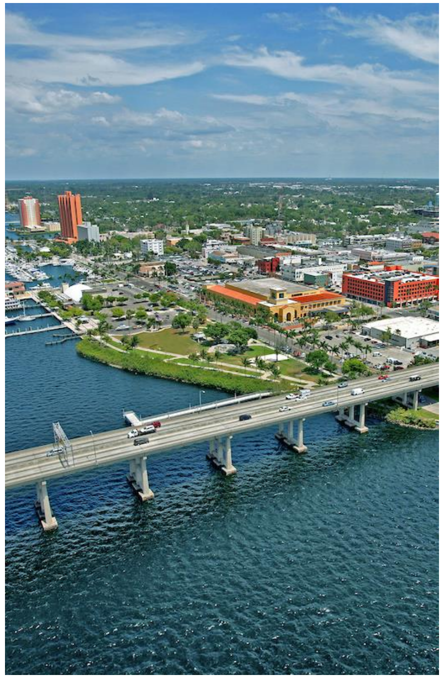
38% Hotel/Motel/Resort/B&B



24% Non-paid Accommodations



2% RV Park/Campground



4% Day trippers

LENGTH OF STAY & NUMBER OF TIMES IN DESTINATION

- Visitors[1] spent **7.2 nights** in The Beaches of Fort Myers & Sanibel
- **30%** were **first time** visitors
- **17%** have visited **more than 10 times**

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

VISITOR ACTIVITIES

- Top visitor activities include[1]:

78% Beaches

70% Relax & unwind

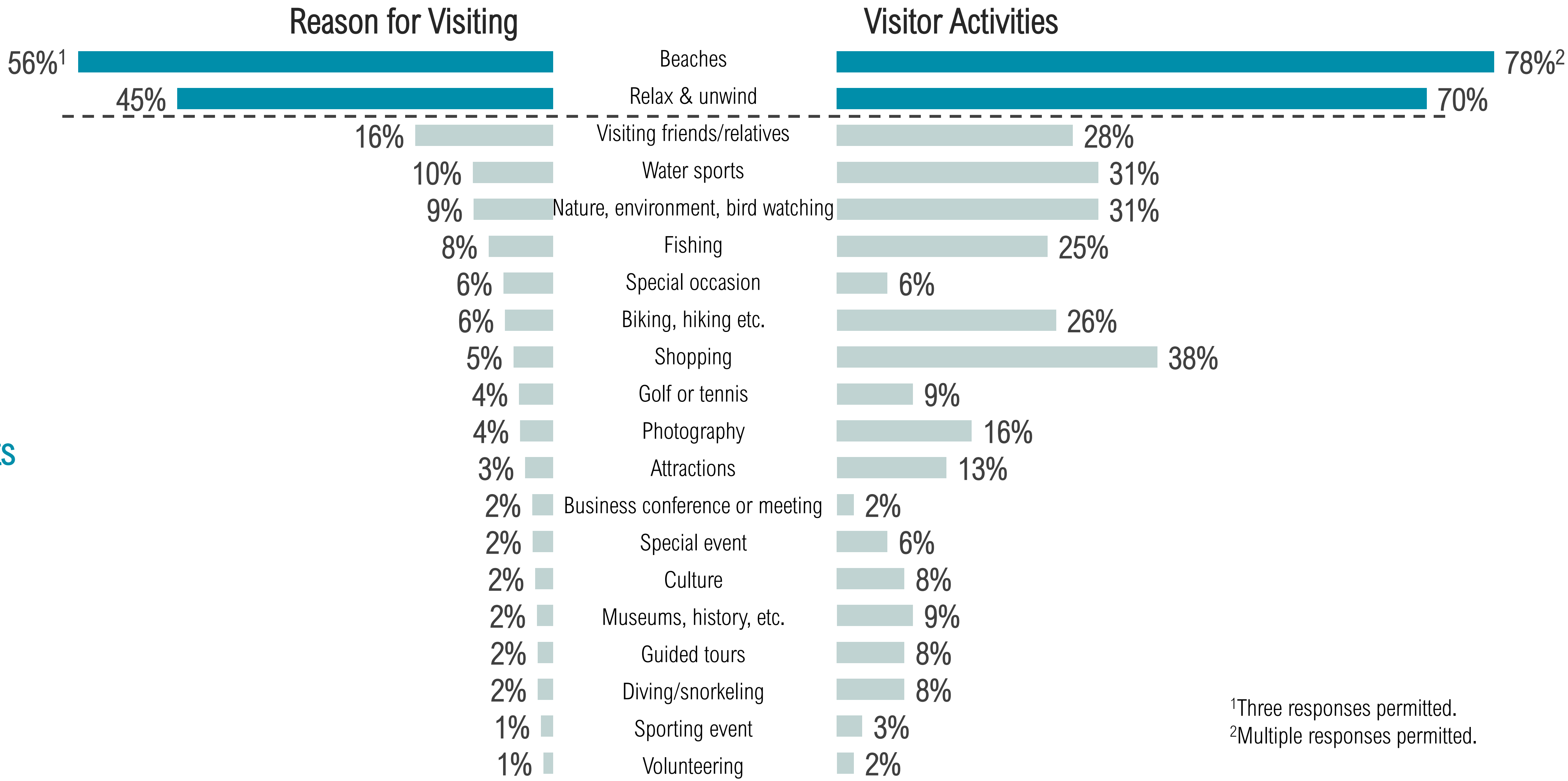
54% Dining

[1]Multiple responses permitted.

REASON FOR VISITING VS. VISITOR ACTIVITIES

Key Reasons for Visiting

Trip Enhancements



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

TOP ATTRACTIONS VISITED[1]

78% Beaches

36% Fort Myers Beach Pier

32% Sanibel Lighthouse

[1]Multiple responses permitted.

TOP COMMUNITIES STAYED

29% Sanibel Island

25% Fort Myers Beach

14% Fort Myers

11% Cape Coral

VISITOR JOURNEY: POST-TRIP EVALUATION

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

SATISFACTION

- **96%** of visitors are **likely to recommend** The Beaches of Fort Myers & Sanibel
- **89%** of visitors are **likely to return**
- **56%** of visitors are **likely to return next year**

SATISFACTION

- **97%** of visitors were **satisfied or very satisfied with their overall visit** to The Beaches of Fort Myers & Sanibel (72% were very satisfied)
- **93%** of visitors were **satisfied or very satisfied with customer service** on their visit (65% were very satisfied)
- **40%** of visitors said paid accommodations **exceeded their expectations** (96% met or exceeded expectations)

TOP ATTRIBUTE RATINGS

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

98% Warm weather

97% A safe destination

97% Peaceful/relaxing

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

LEAST LIKED FEATURES[1]

- Nearly half of visitors indicated beach seaweed was the feature they least liked during their visit.

→ 1 in 5 visitors least liked the traffic and weather

→ 18% of visitors had no concerns about the destination

[1]During this specific visit, which features have you liked LEAST about our area?

AREA DESCRIPTIONS

Wonderful Place to Visit

"Best vacation ever! Lots to do from mini golf to water sports at the beach. The kids had a good time."

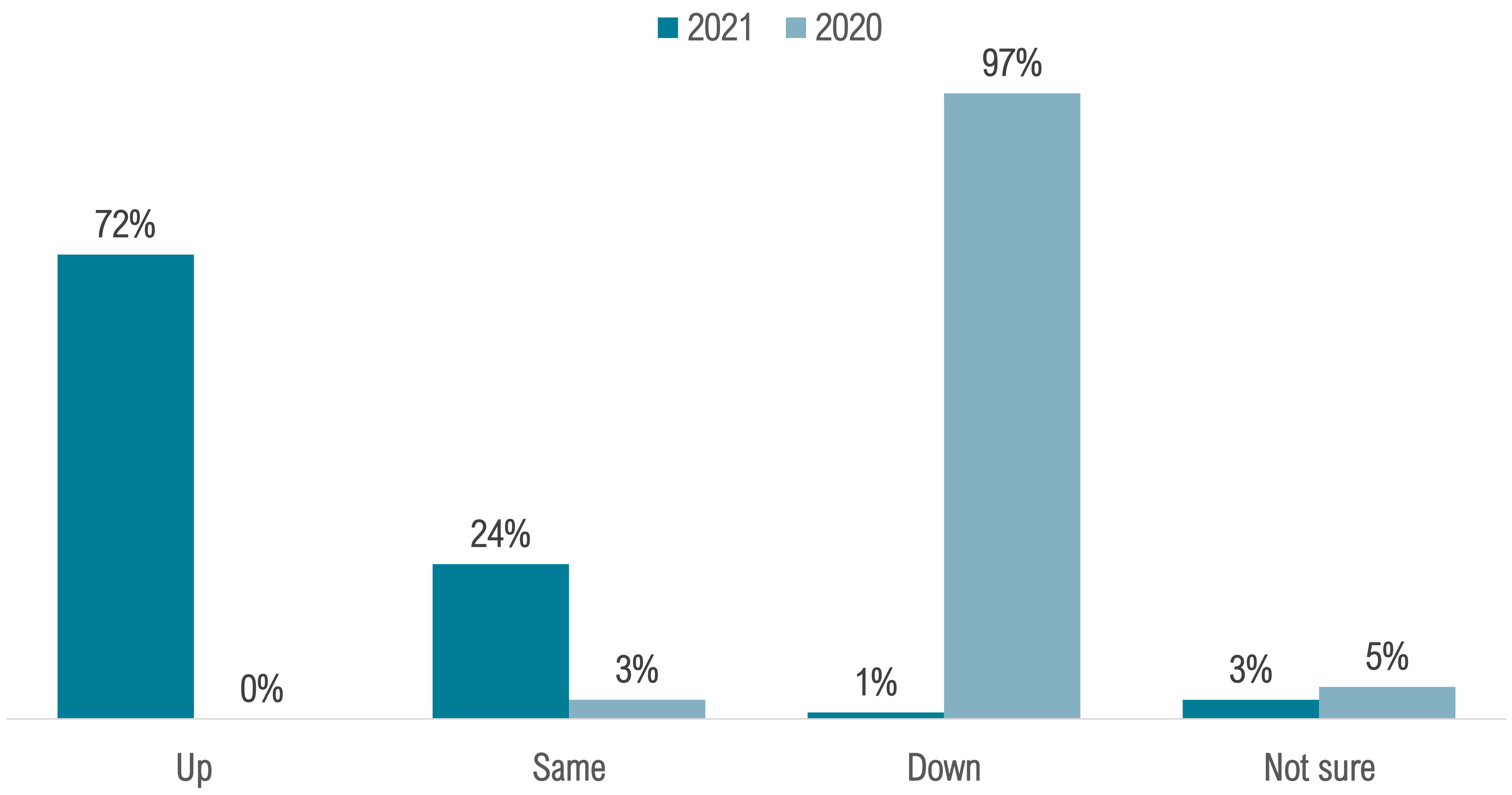
Beautiful Beaches

"Lovely shell covered beaches with vivid green and blue colors of the Gulf."

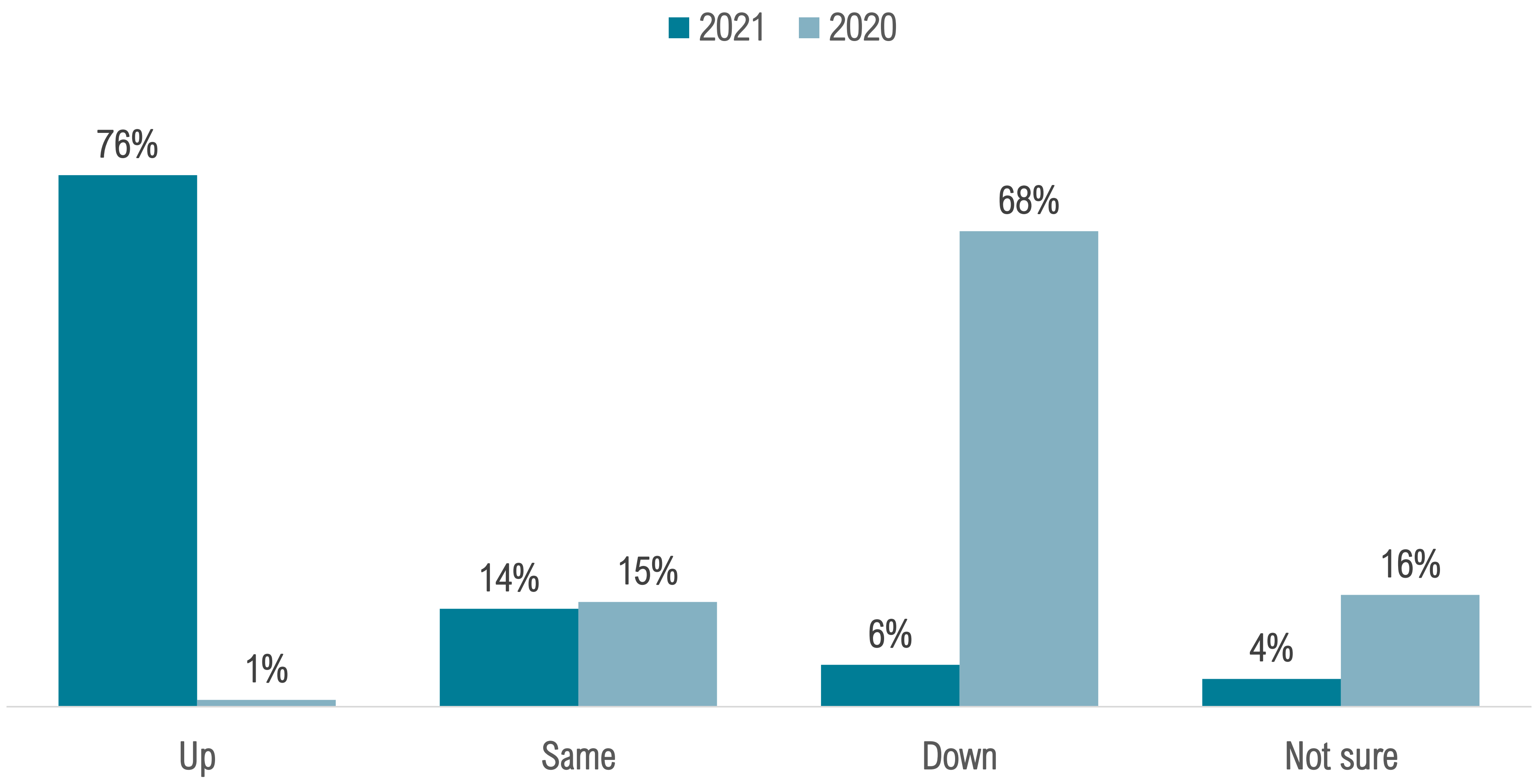
Warm Weather

"Pleasant and spacious. Breezy to keep you cool. Friendly and helpful citizens. A safe and enjoyable place where atmosphere is stress free."

OCCUPANCY BAROMETER: JULY – SEPTEMBER RESERVATIONS

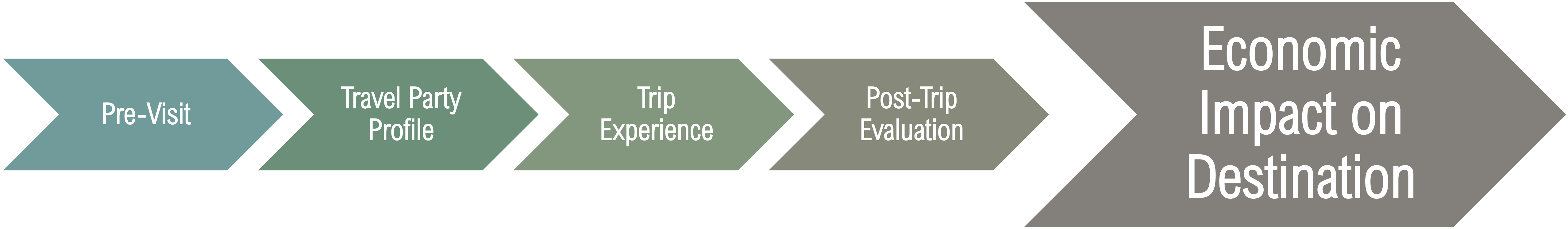


OCCUPANCY BAROMETER: OCTOBER – DECEMBER RESERVATIONS



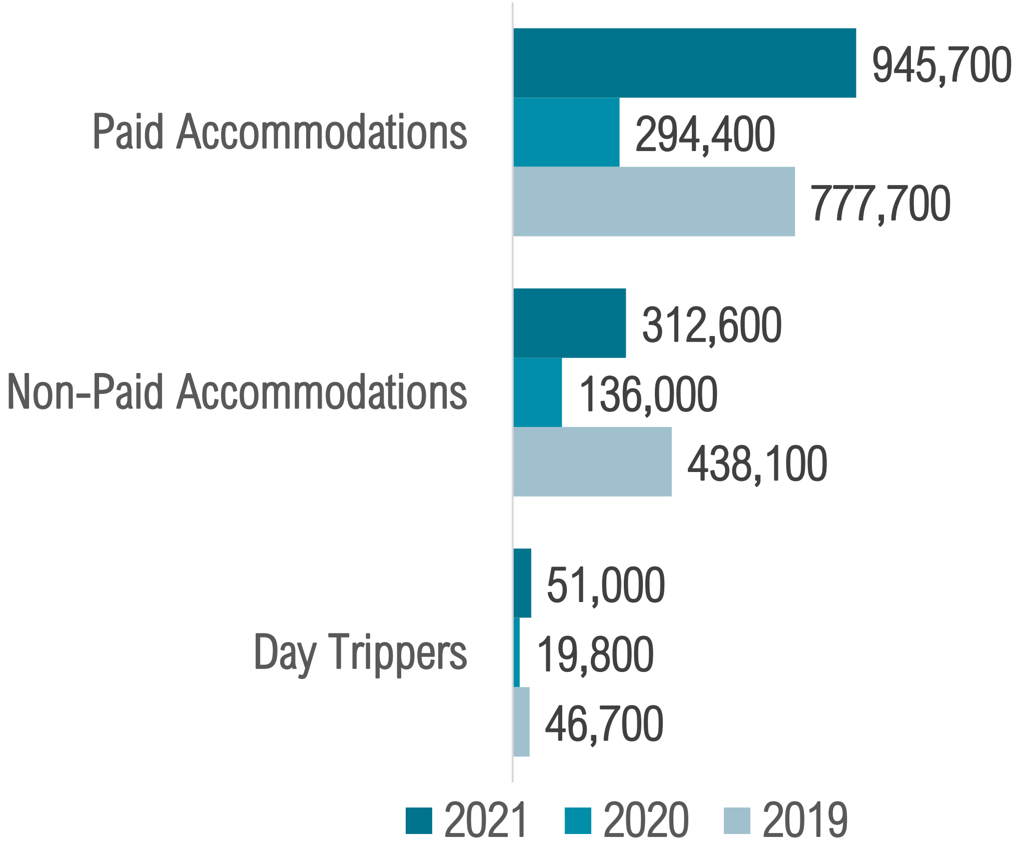
Detailed Findings

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION



NUMBER OF VISITORS

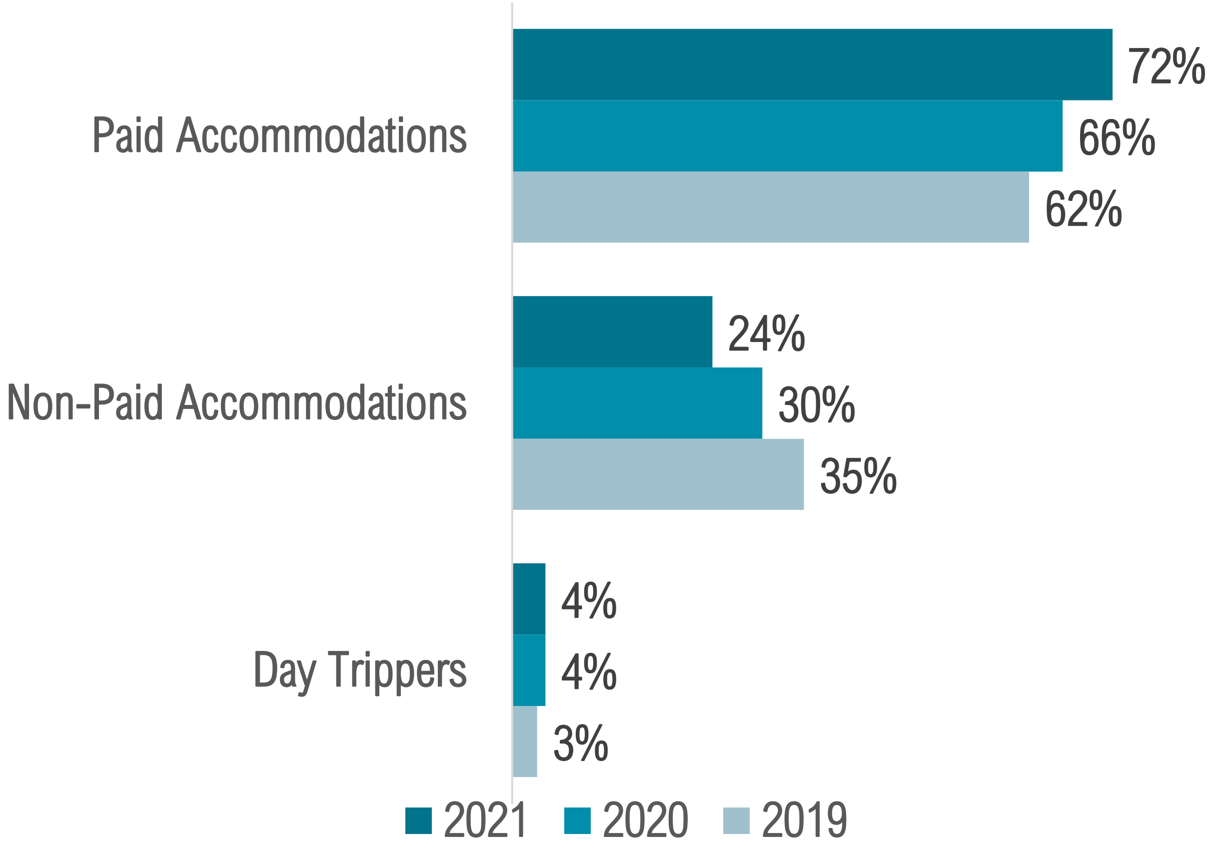
There were 1,309,300[1] visitors to The Beaches of Fort Myers & Sanibel in Apr – June 2021 (+3.7% from 2019).



[1]Sources: Visitor Tracking Study & Occupancy Survey

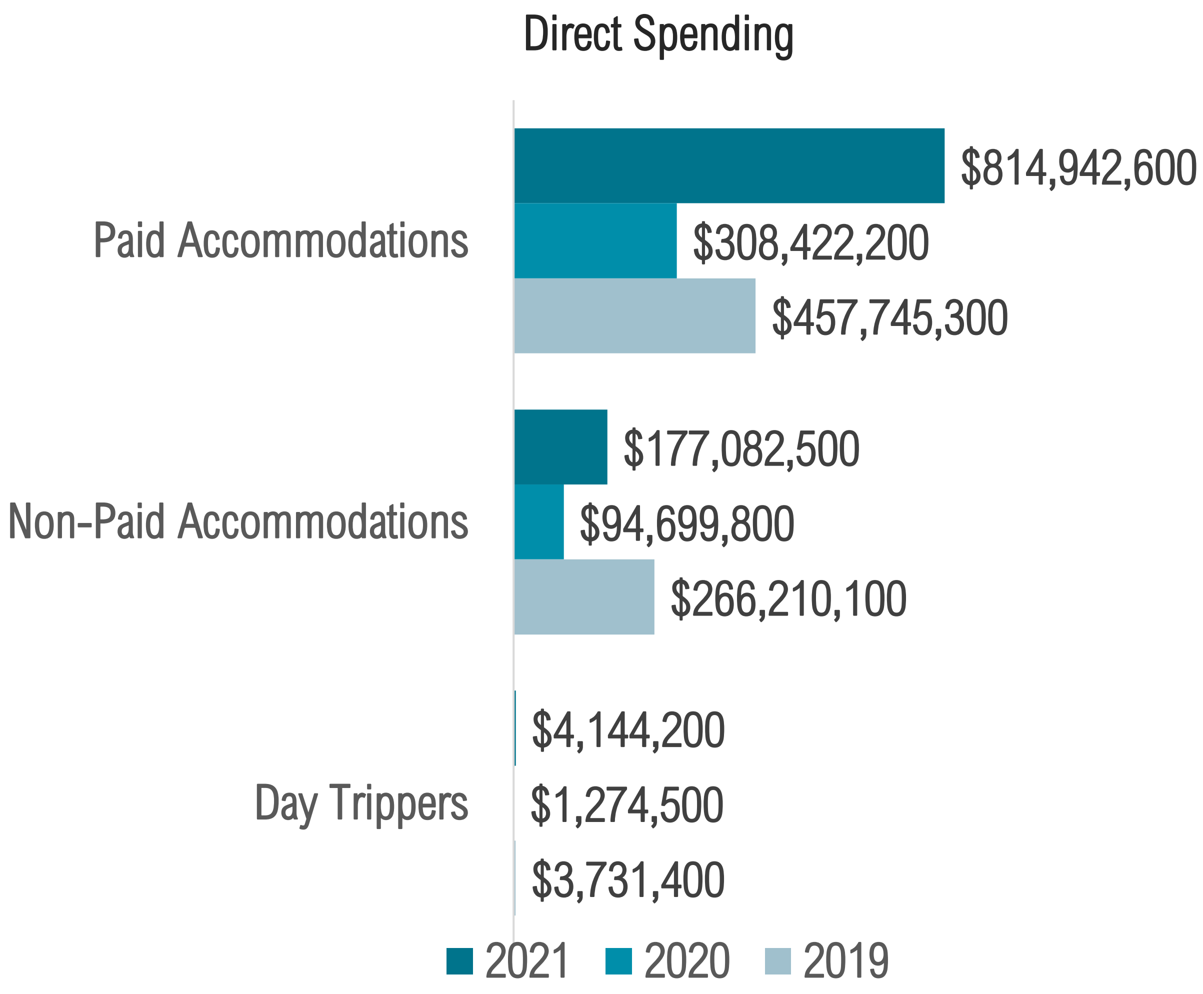
VISITOR TYPE

Visitors staying in paid accommodations accounted for nearly 3 in 4 visitors.



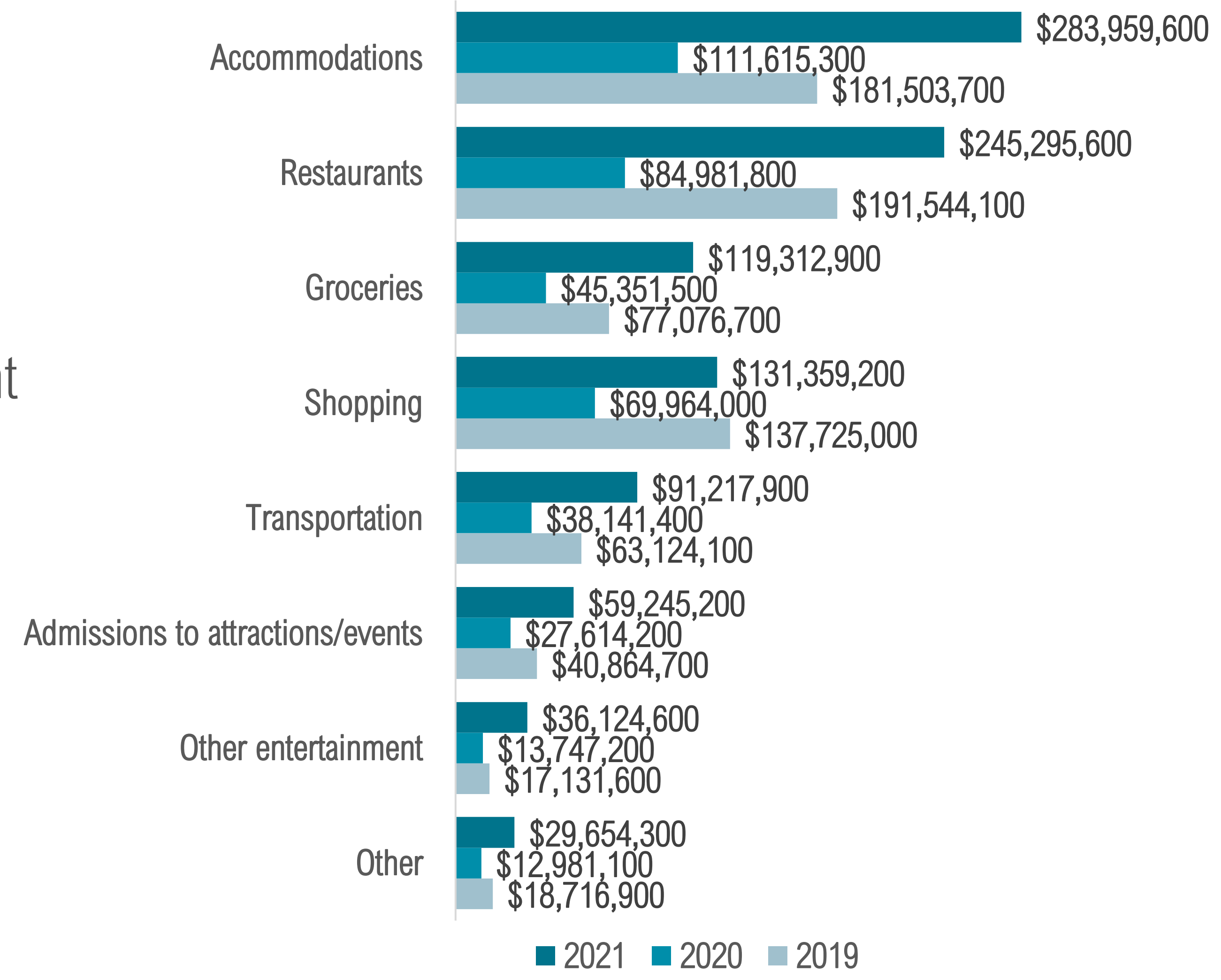
VISITOR EXPENDITURES BY VISITOR TYPE

Apr – June visitors spent $996,169,300 in The Beaches of Fort Myers & Sanibel, resulting in a total economic impact of $1,587,893,900, up 34.4% from 2019.



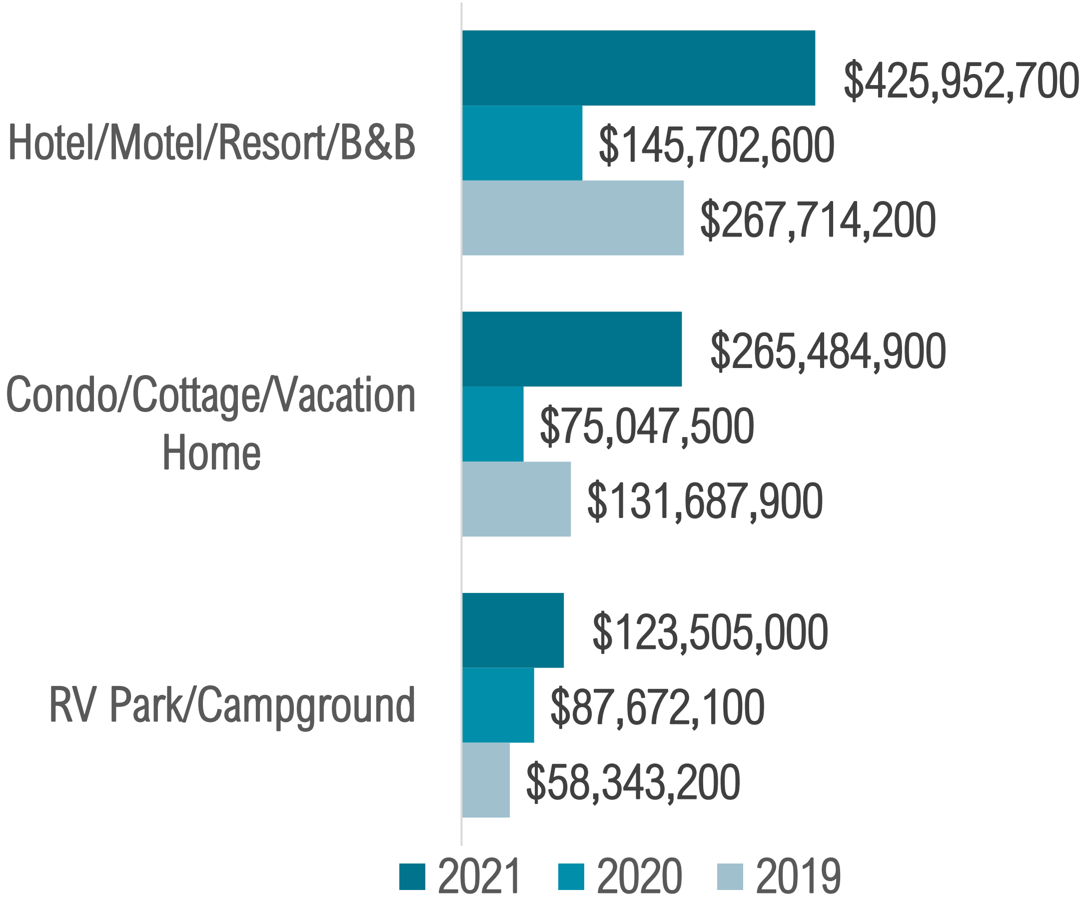
VISITOR EXPENDITURES BY SPENDING CATEGORY

Of the **$996,169,300** visitors spent in The Beaches of Fort Myers & Sanibel, 29% was spent on **accommodations** and 25% was spent on **restaurants**, accounting for **54% of all visitor spending**.



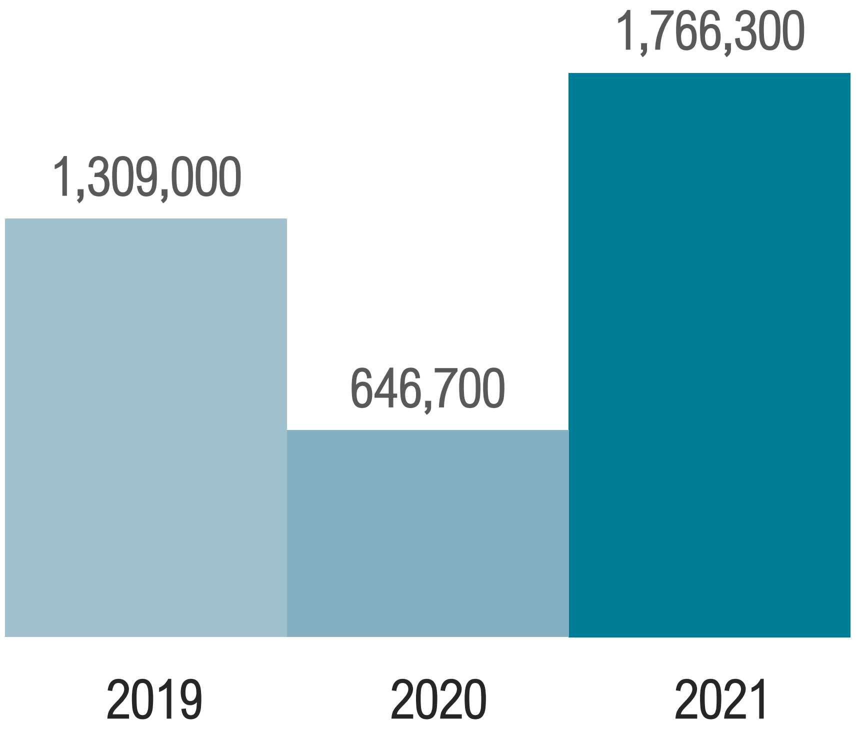
VISITOR EXPENDITURES BY LODGING TYPE

Apr – June visitors staying in paid accommodations spent $814,942,600 in The Beaches of Fort Myers & Sanibel.



ROOM NIGHTS GENERATED

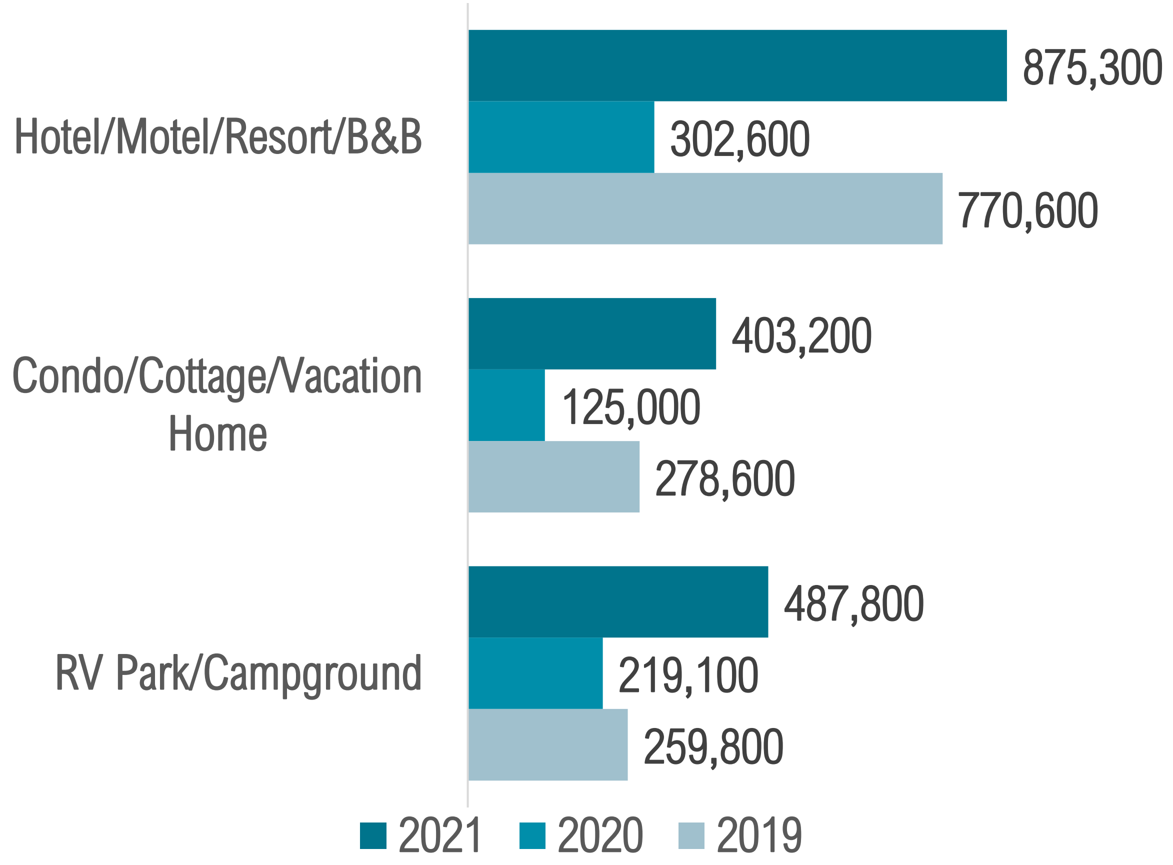
Apr – June visitors spent 1,766,300 nights in The Beaches of Fort Myers & Sanibel hotels, resorts, condos, rental houses, etc. (+34.9% from 2019).



[1]Source: Occupancy Survey

ROOM NIGHTS GENERATED

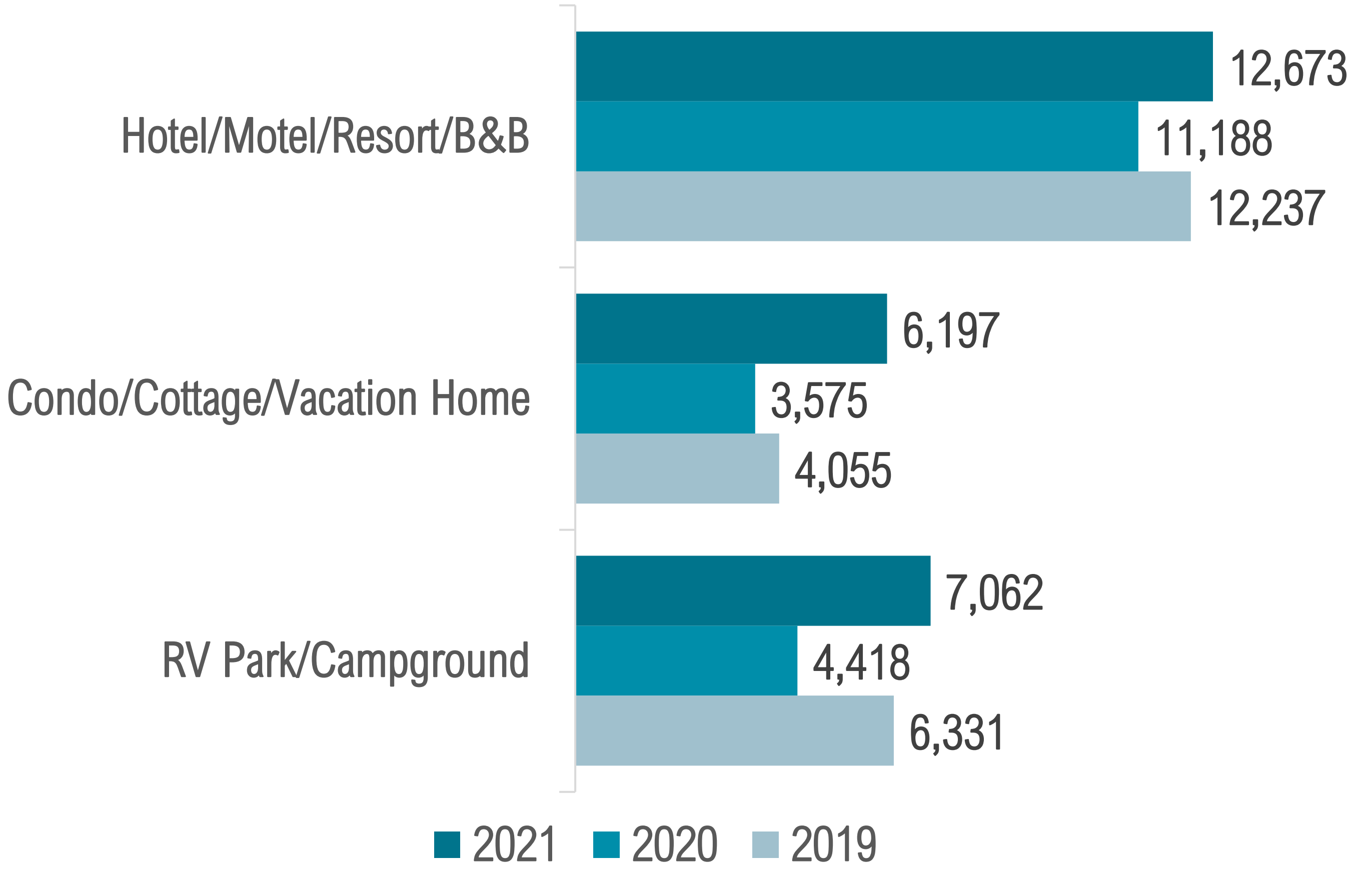
Motels, hotels, etc. accounted for nearly 1 in 2 nights in The Beaches of Fort Myers & Sanibel, while vacation rentals accounted for nearly 1 in 4 nights visitors spent in the area.



[1]Source: Occupancy Survey

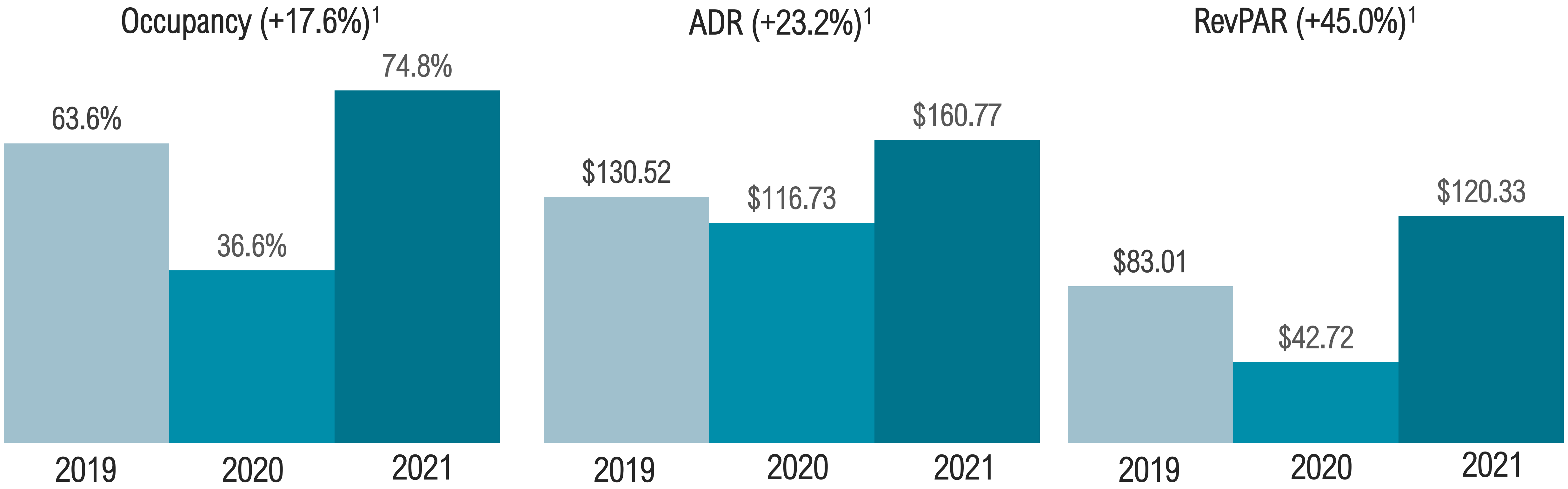
AVAILABLE UNITS

There were **25,932**[1] available units in Apr – June, 2021 vs. 22,623 in 2019 (+14.6%). Nearly half of the units were hotels, motels, etc.



[1]Source: Occupancy Survey

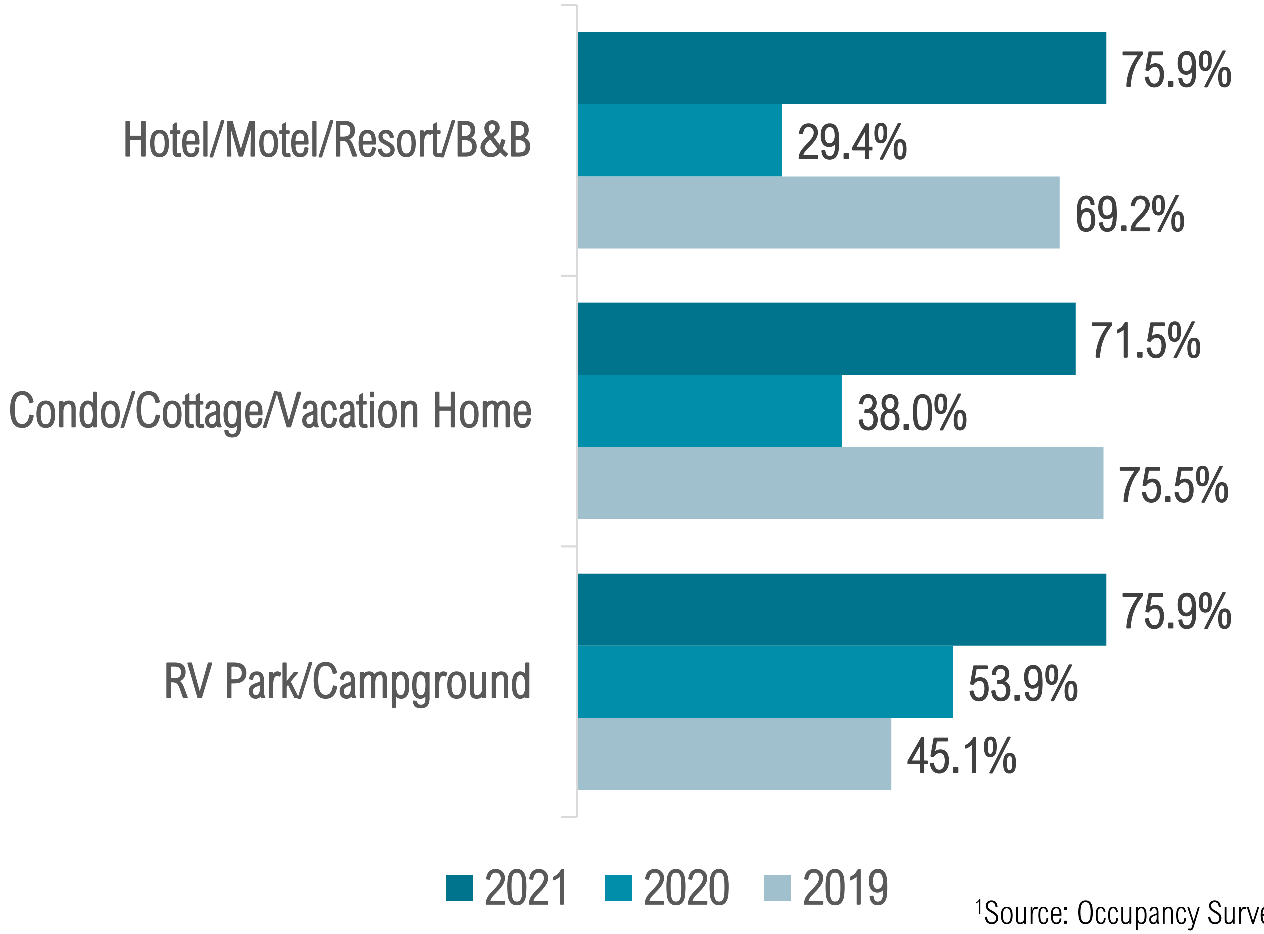
OCCUPANCY, ADR AND REVPAR



[1]Source: Occupancy Survey

OCCUPANCY

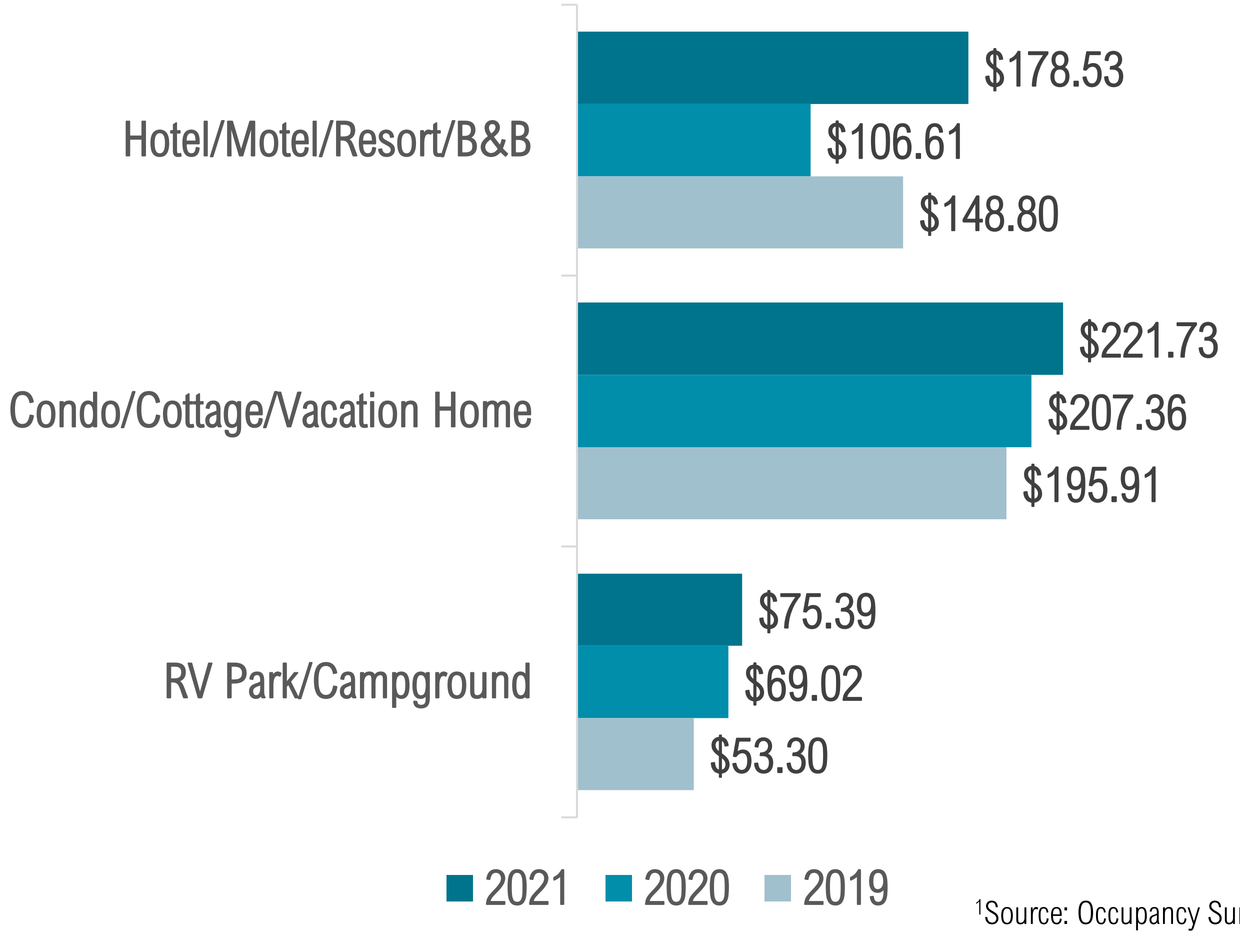
Average occupancy in Apr – June was **74.8%**[1] (63.6% in 2019).



[1]Source: Occupancy Survey

ADR

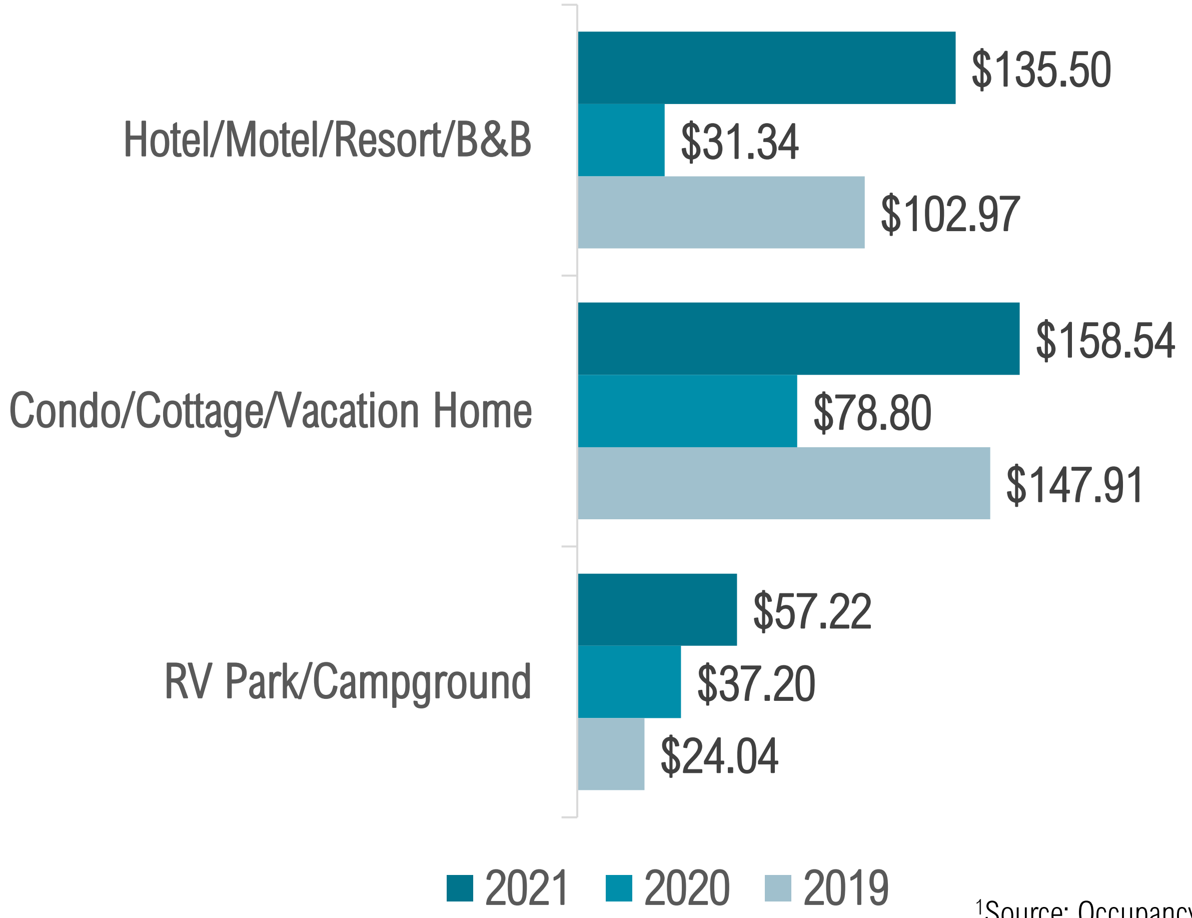
ADR in Apr – June was $160.77[1] ($130.52 in 2019).



[1]Source: Occupancy Survey

REVPAR

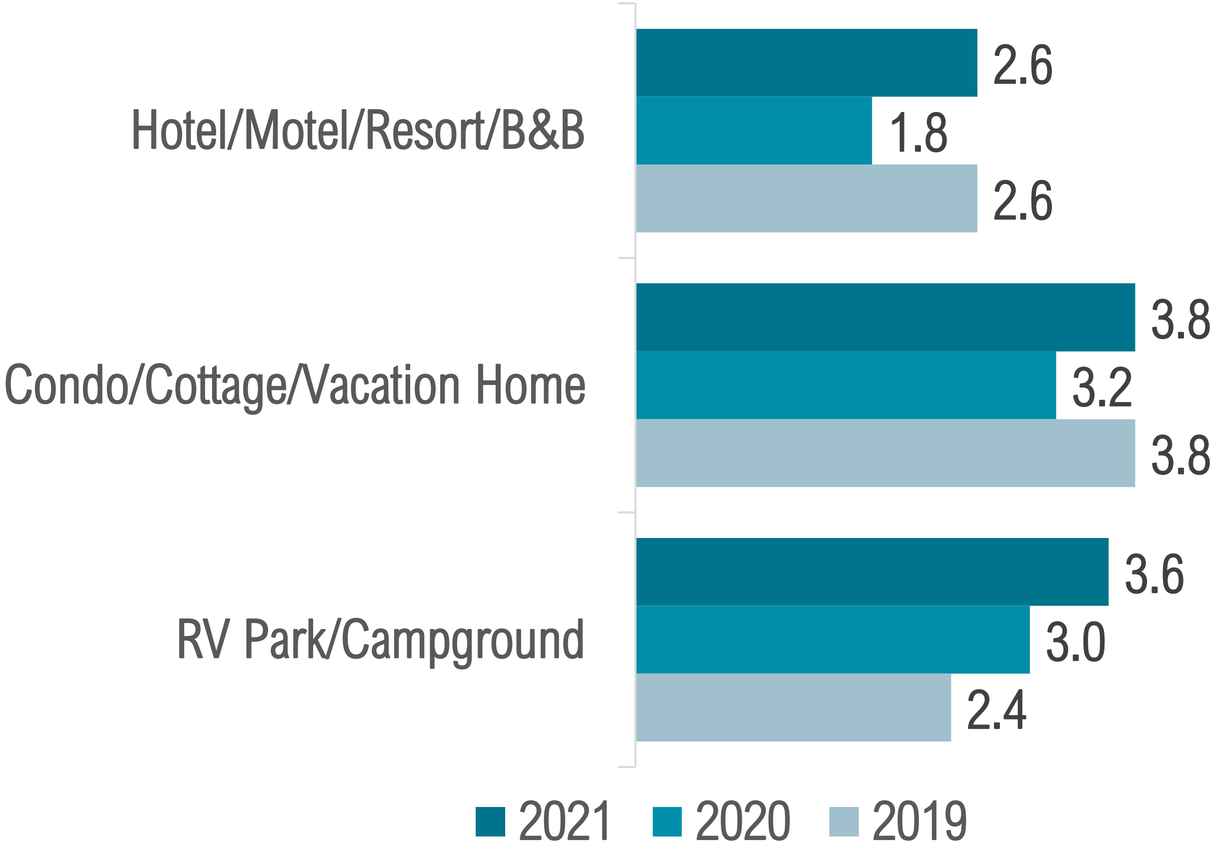
Average RevPAR in Apr – June was $120.33[1] ($83.01 in 2019).



[1]Source: Occupancy Survey

TRAVEL PARTY SIZE

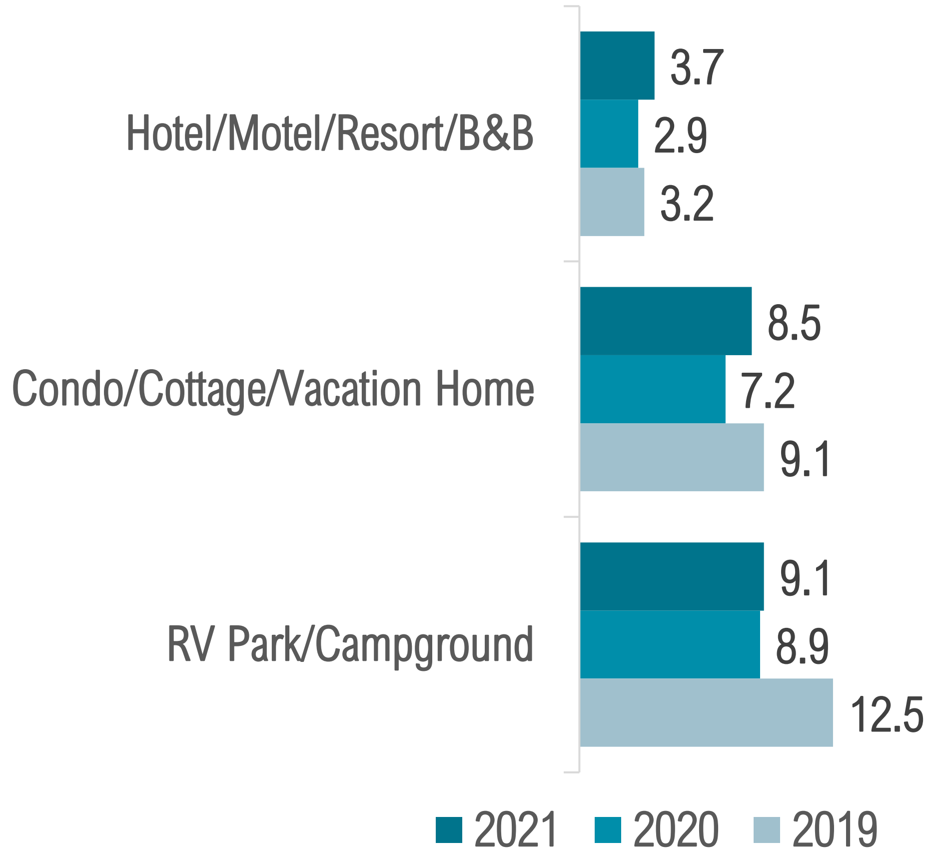
For visitors in paid accommodations, average travel party size in Apr – June was **3.0 people**[1] (2.8 people in 2019).



[1]Source: Occupancy Survey

LENGTH OF STAY

For visitors in paid accommodations, average length of stay in Apr – June was **5.6 nights**[1] (4.7 nights in 2019).



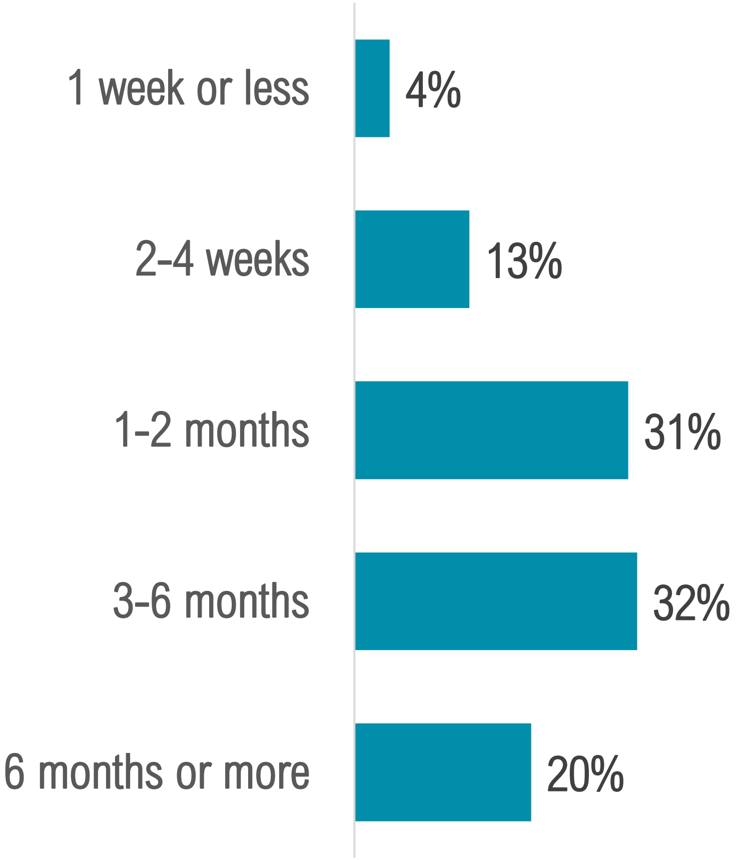
[1]Source: Occupancy Survey

Visitor Journey: Pre-Visit

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

TRIP PLANNING CYCLE

Over **half** of visitors planned their trip **more than 3 months** in advance.

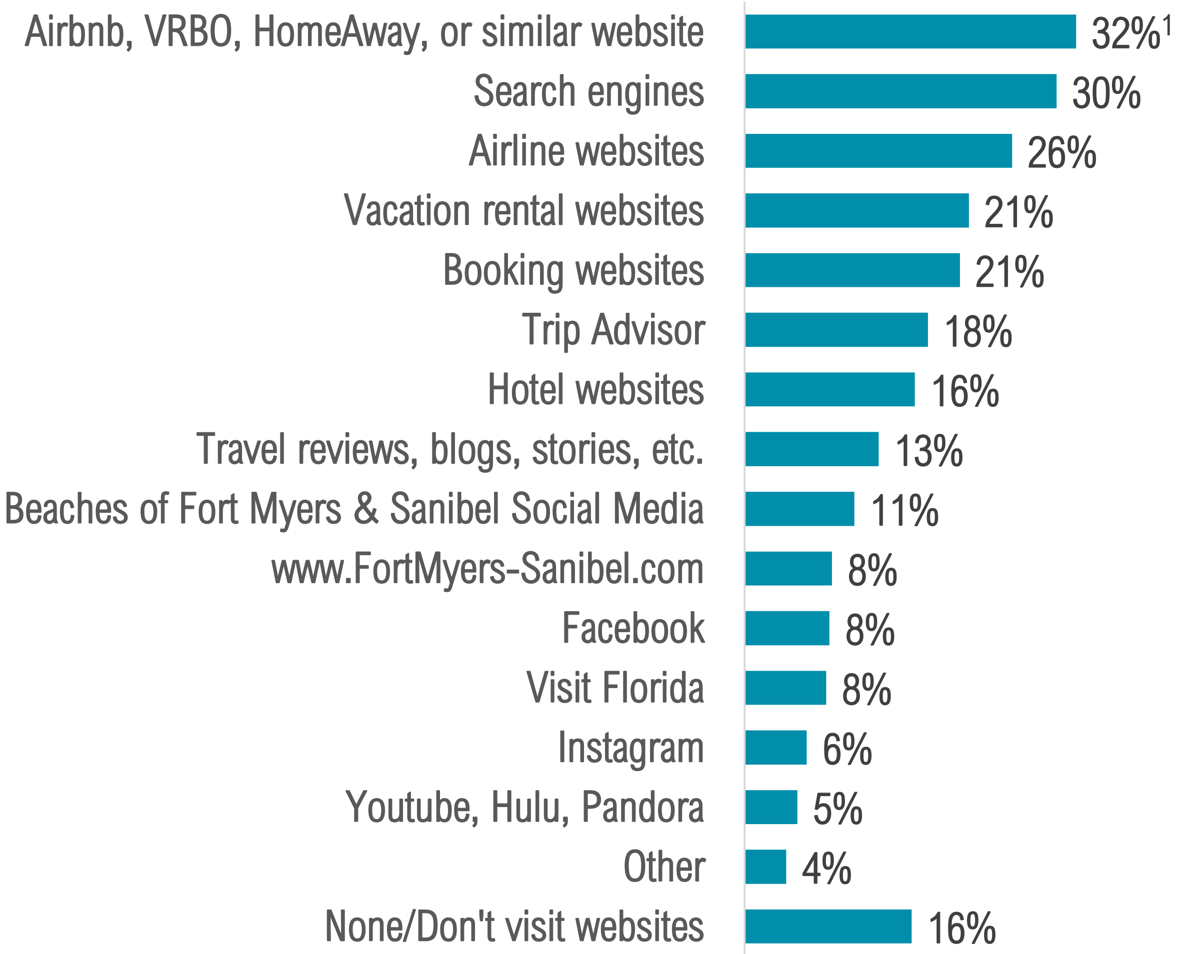


TRIP PLANNING: WEBSITES/APPS USED

Over 4 in 5 visitors used websites/apps to plan their trip to The Beaches of Fort Myers & Sanibel.

Visitors were more likely to use Airbnb/VRBO/HomeAway, search engines, and airline websites to plan their trips.

2021 visitors were more likely to use Airbnb/VRBO/HomeAway and vacation rental websites to plan their trips.



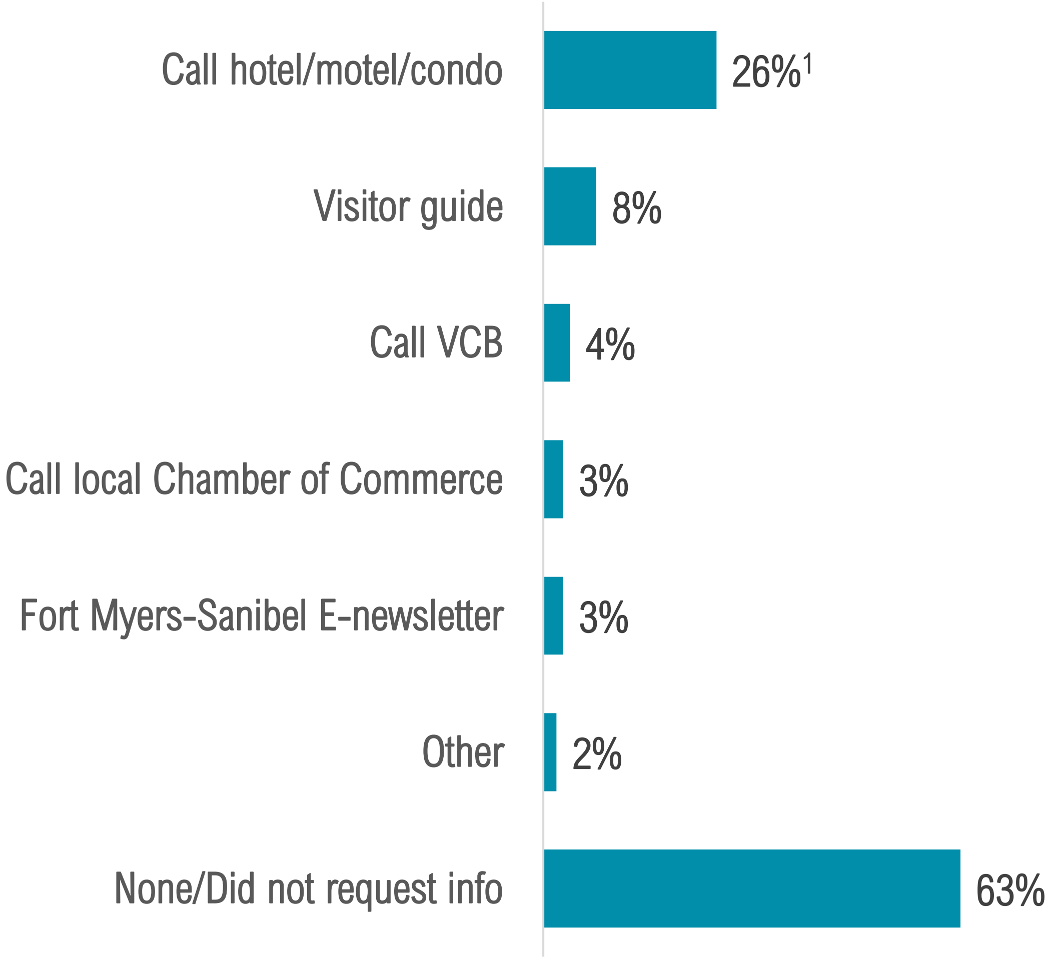
[1]Multiple responses permitted.

TRIP PLANNING: INFORMATION REQUESTS

Nearly 2 in 5 visitors made information requests to plan their trip to The Beaches of Fort Myers & Sanibel.

Visitors who sought information prior to their trips were more likely to rely on hotels/condos and visitors guides.

A higher percentage of visitors requested information from hotels/motels/condos in Apr-June 2021

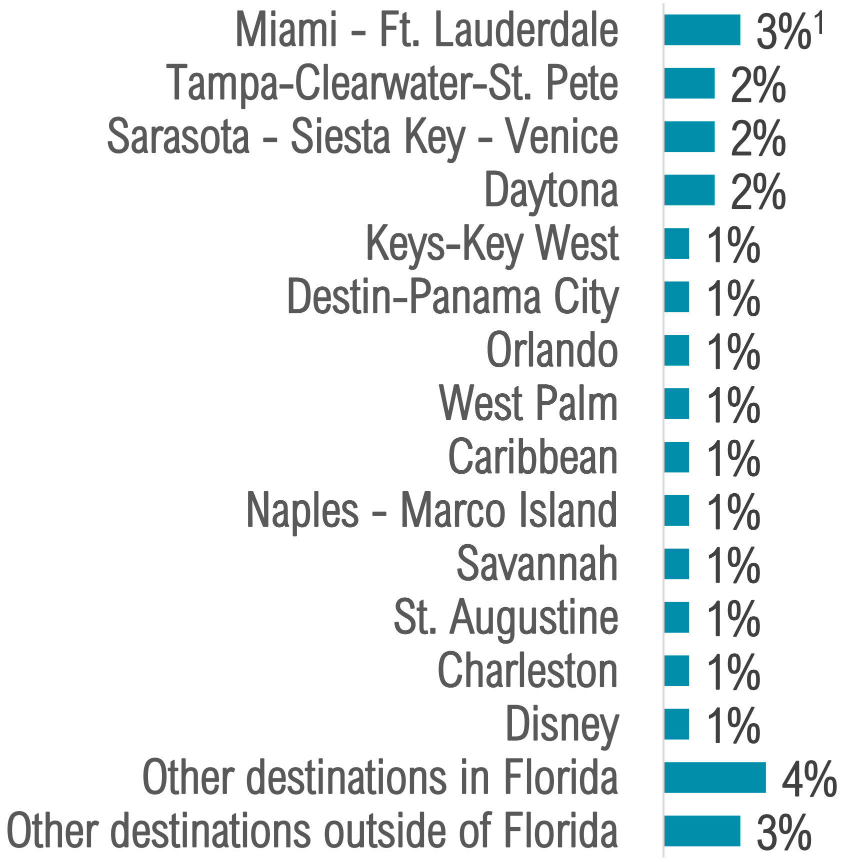


[1]Multiple responses permitted.

TRIP PLANNING: OTHER DESTINATIONS CONSIDERED

25% of visitors considered **choosing other destinations** when planning their trips.

Most alternative destinations were in **Florida**.



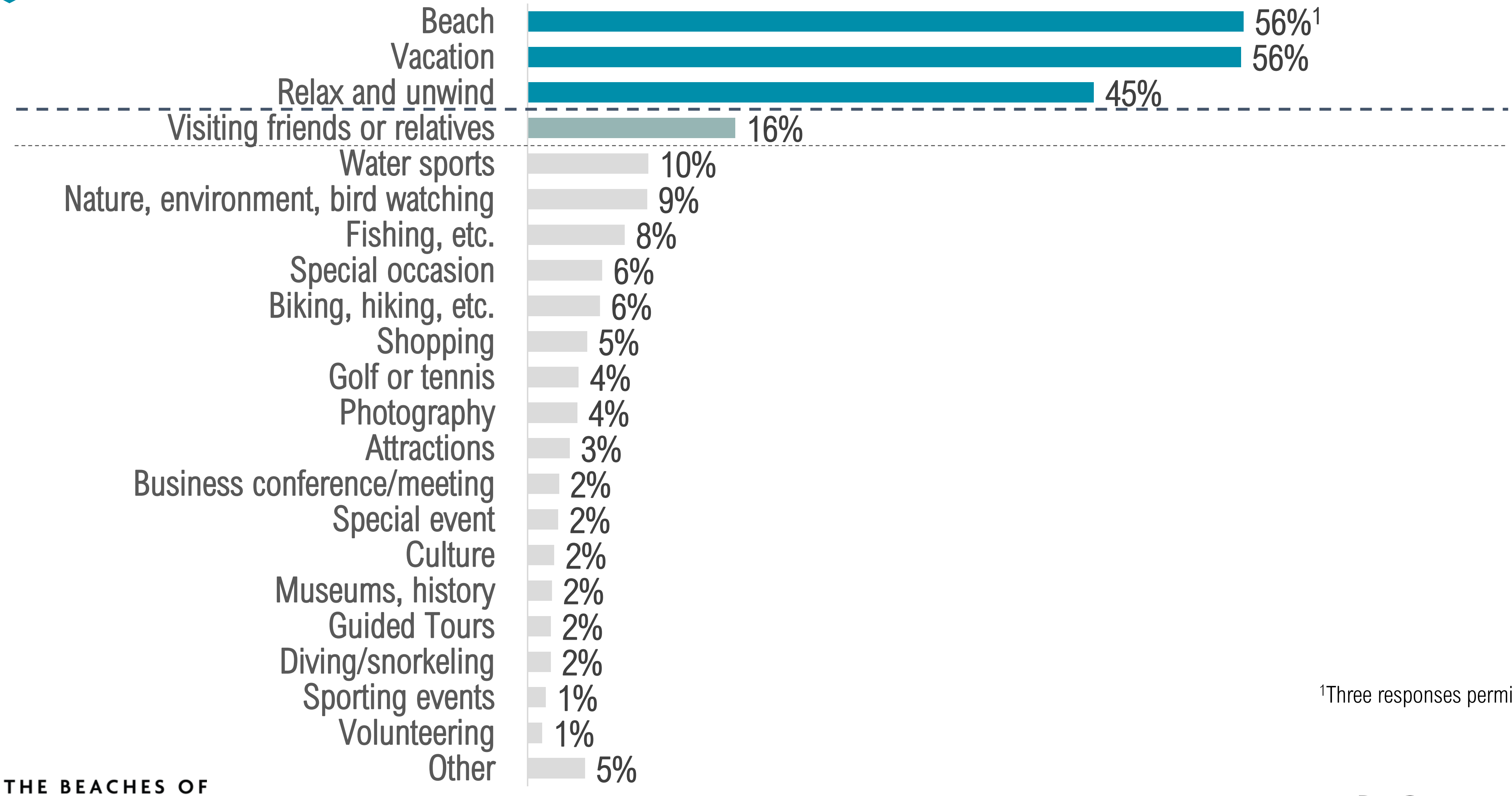
[1]Multiple responses permitted.

TRIP INFLUENCERS

Over 9 in 10 visitors were heavily influenced by The Beaches of Fort Myers & Sanibel being peaceful, warm and safe 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

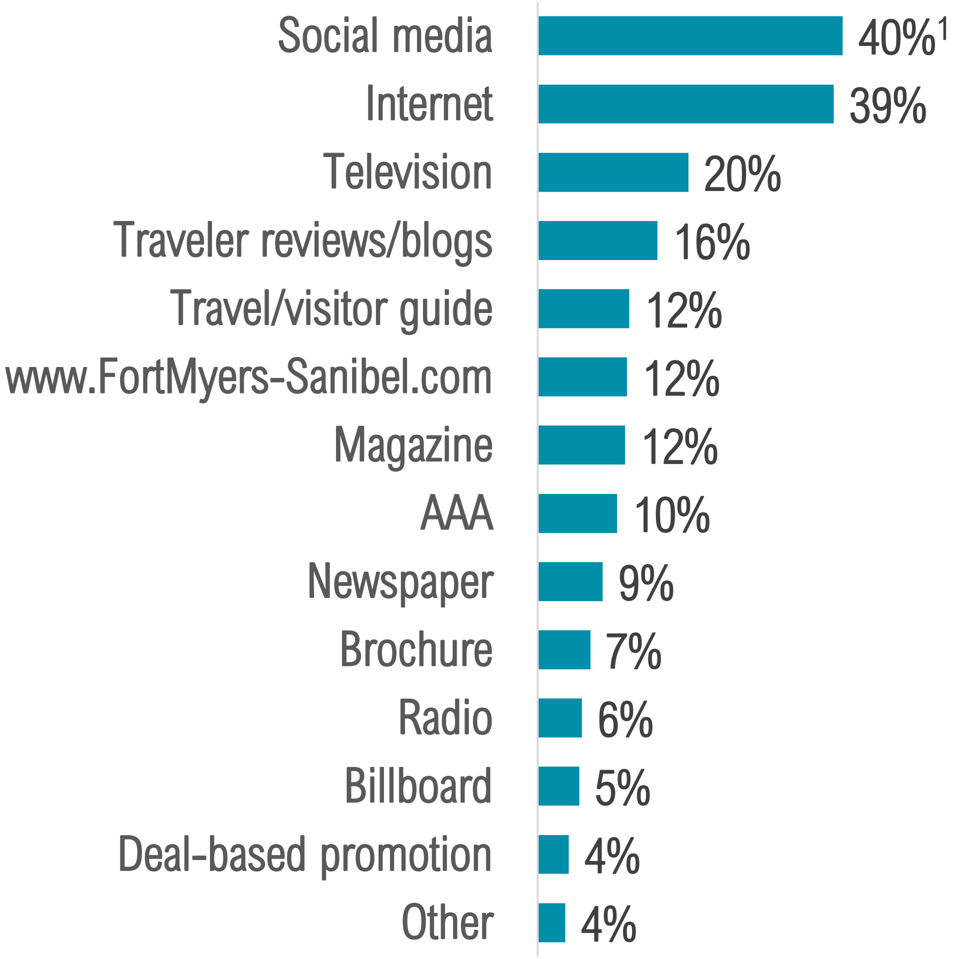


[1]Three responses permitted.

PROMOTIONS

41% of visitors **recalled promotions** in the past 6 months for The Beaches of Fort Myers & Sanibel.

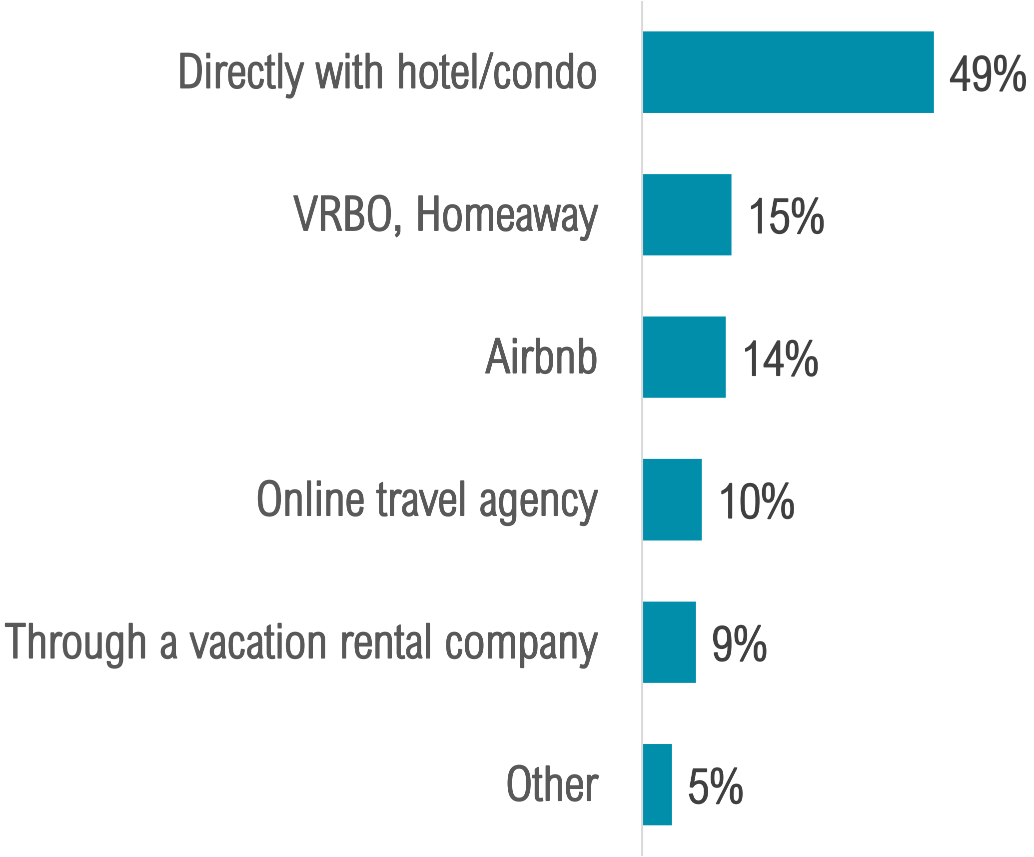
Source of Promotion



[1]Multiple responses permitted.

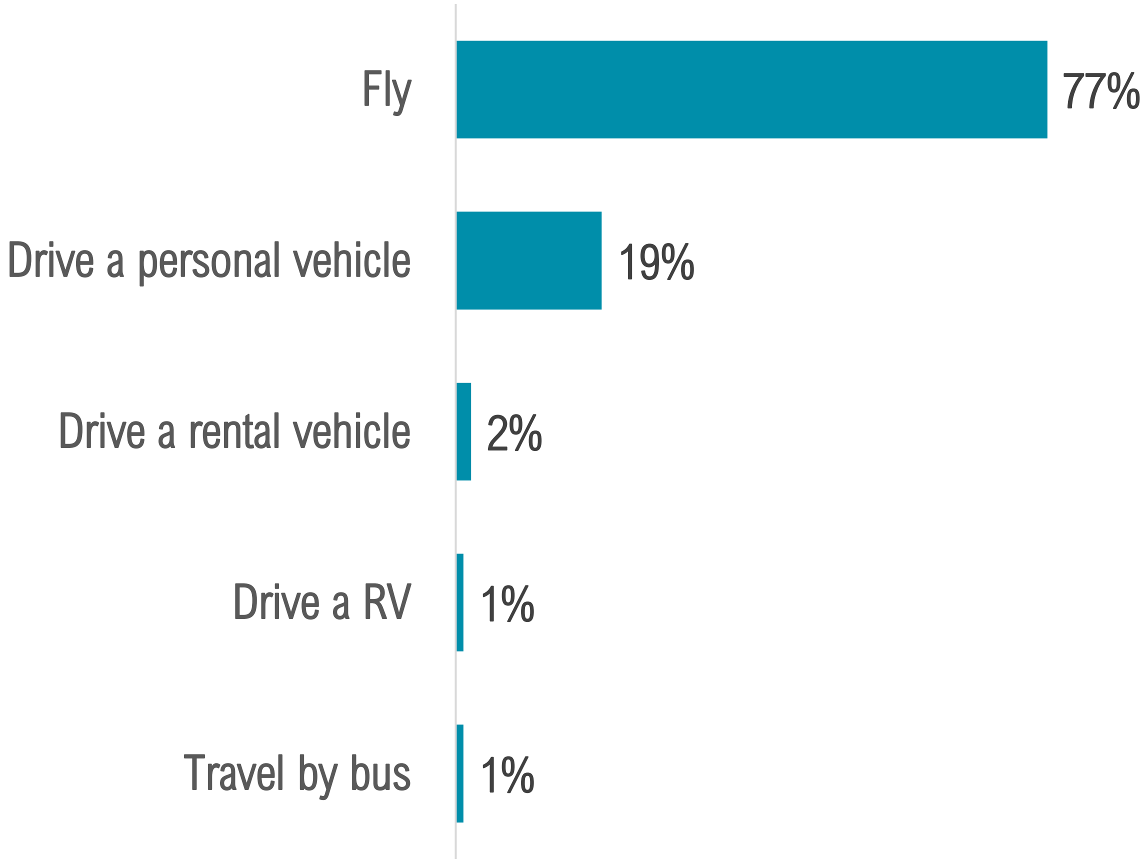
BOOKING

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



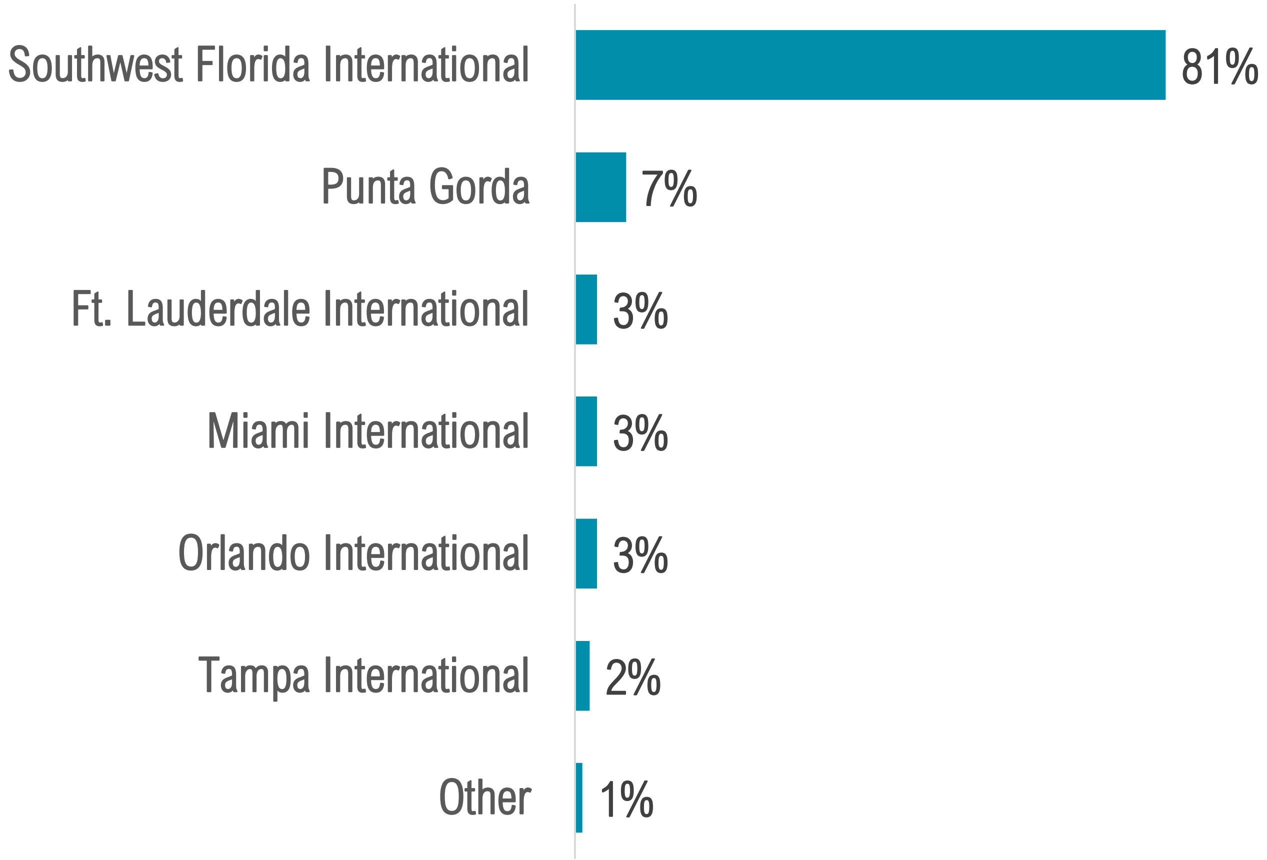
TRANSPORTATION

Over 3 in 4 visitors flew to The Beaches of Fort Myers & Sanibel.



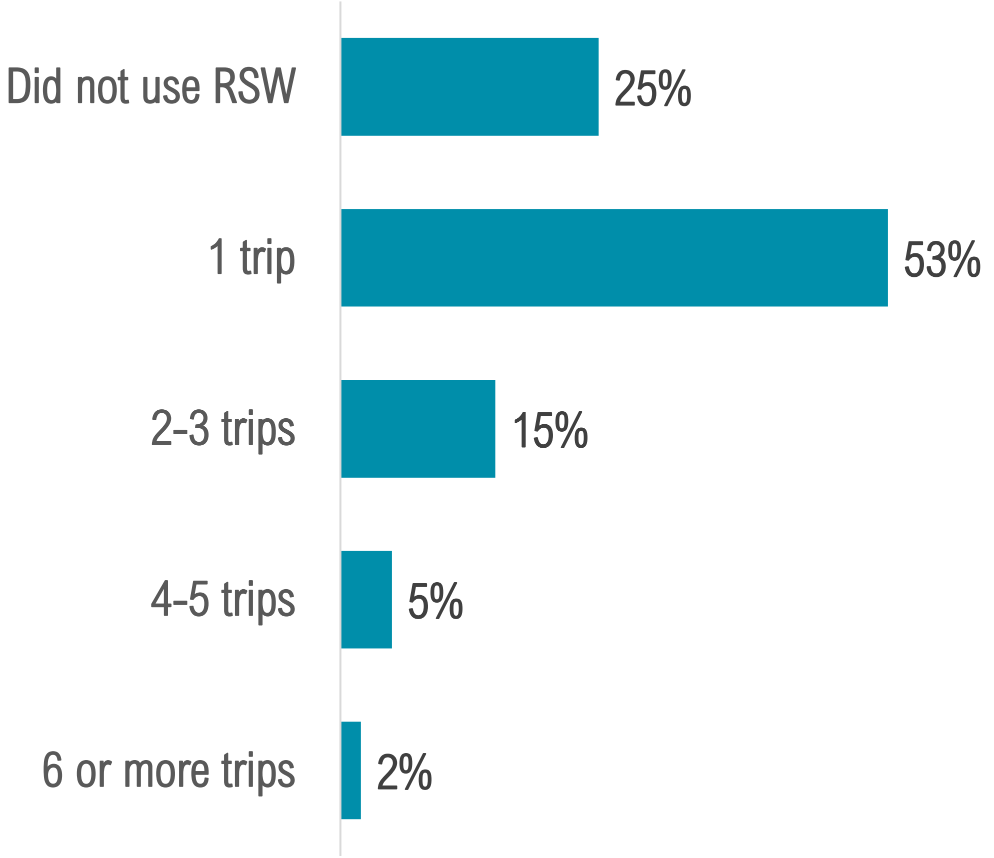
AIRPORT

Over 4 in 5 visitors who flew to The Beaches of Fort Myers & Sanibel came through **RSW** – this translates to **62% of all visitors.**



USE OF RSW IN THE PAST YEAR

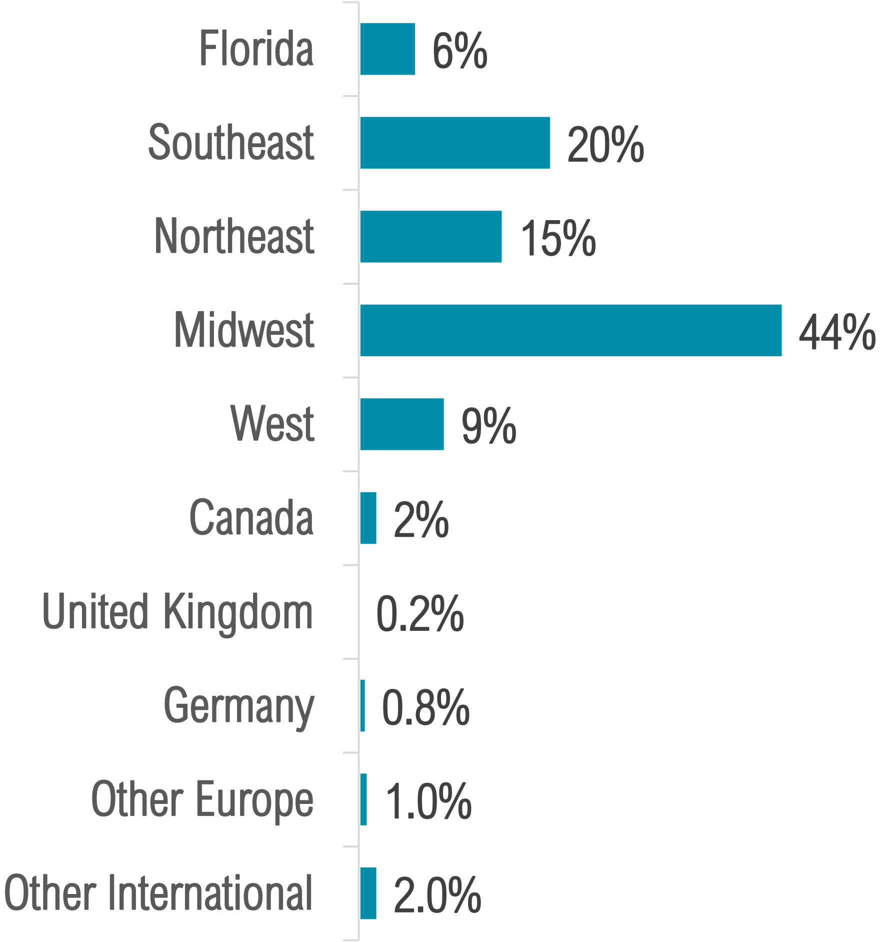
3 in 4 visitors used RSW at least once in the past year.

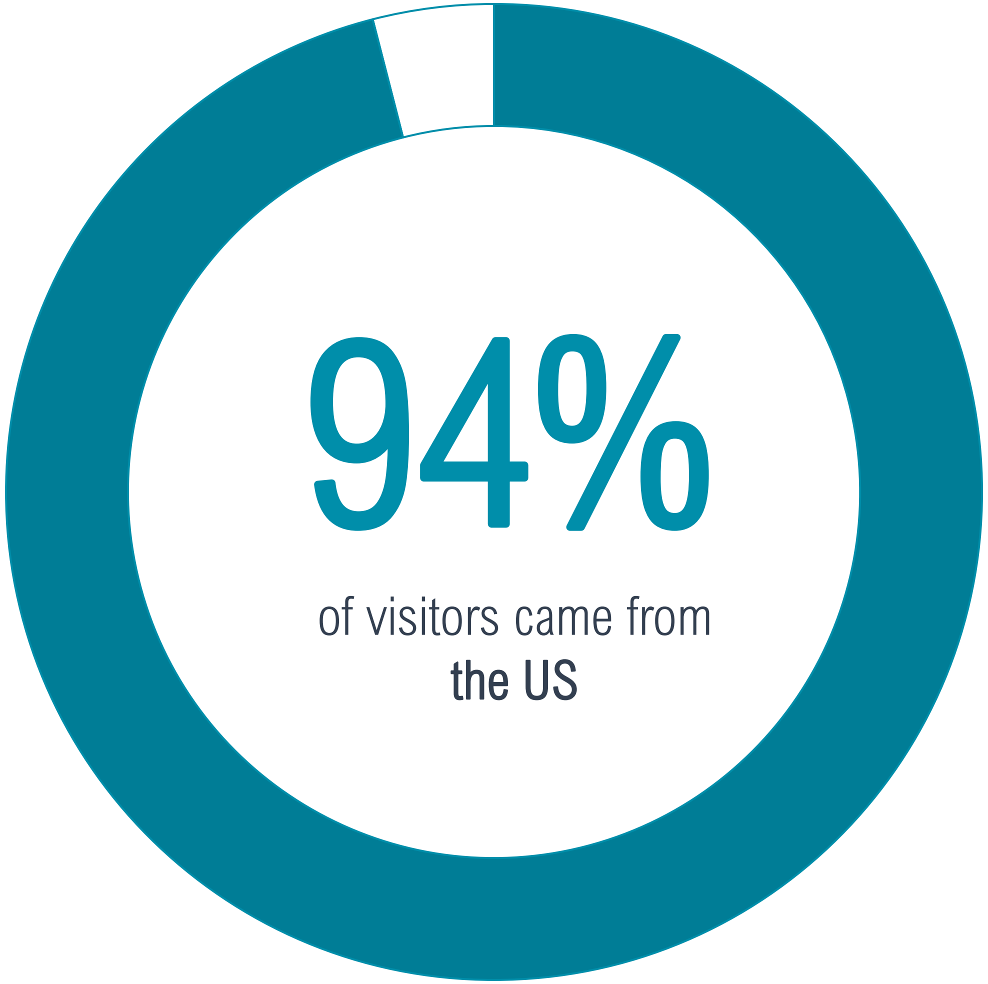


VISITOR JOURNEY: TRAVEL PARTY PROFILE

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

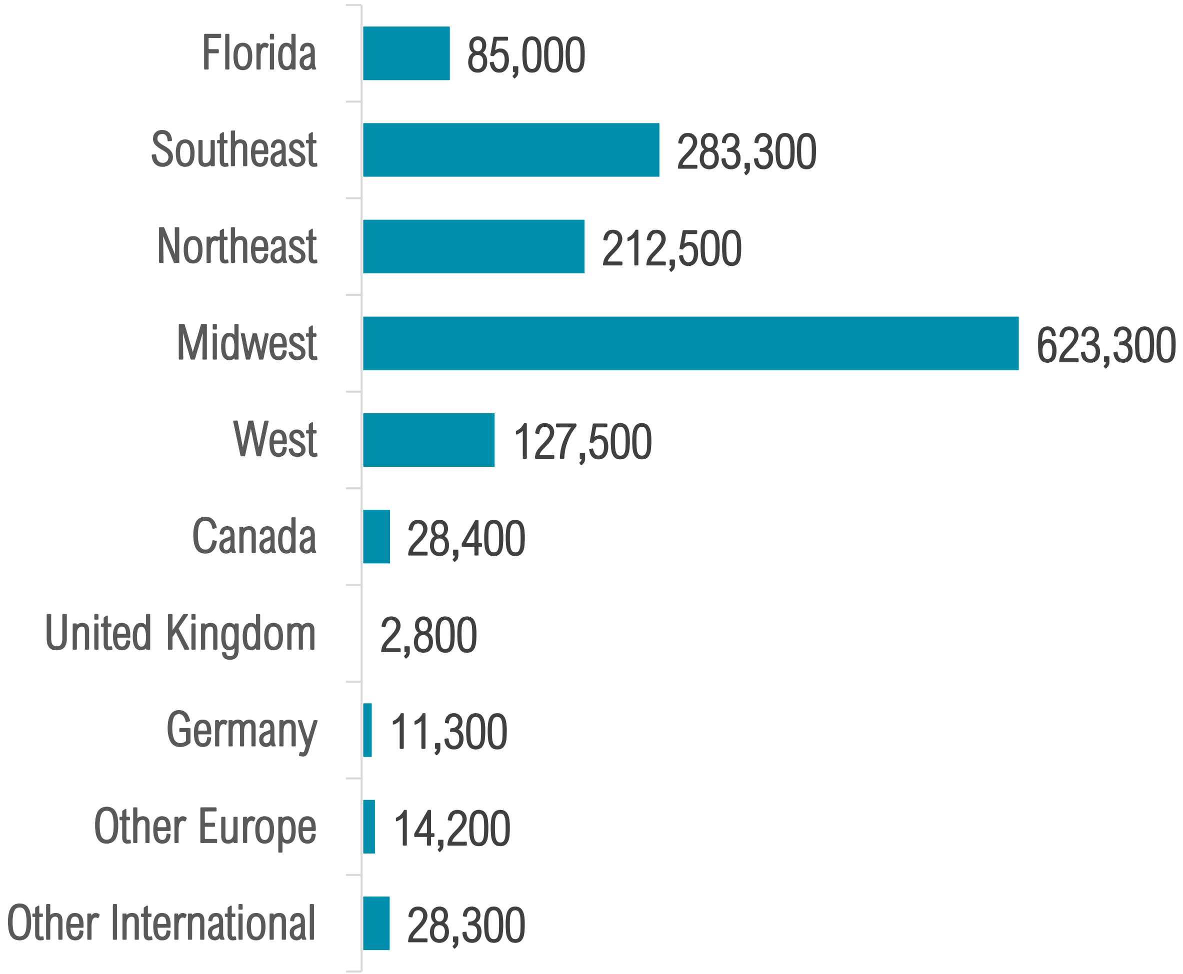
ORIGIN[1]



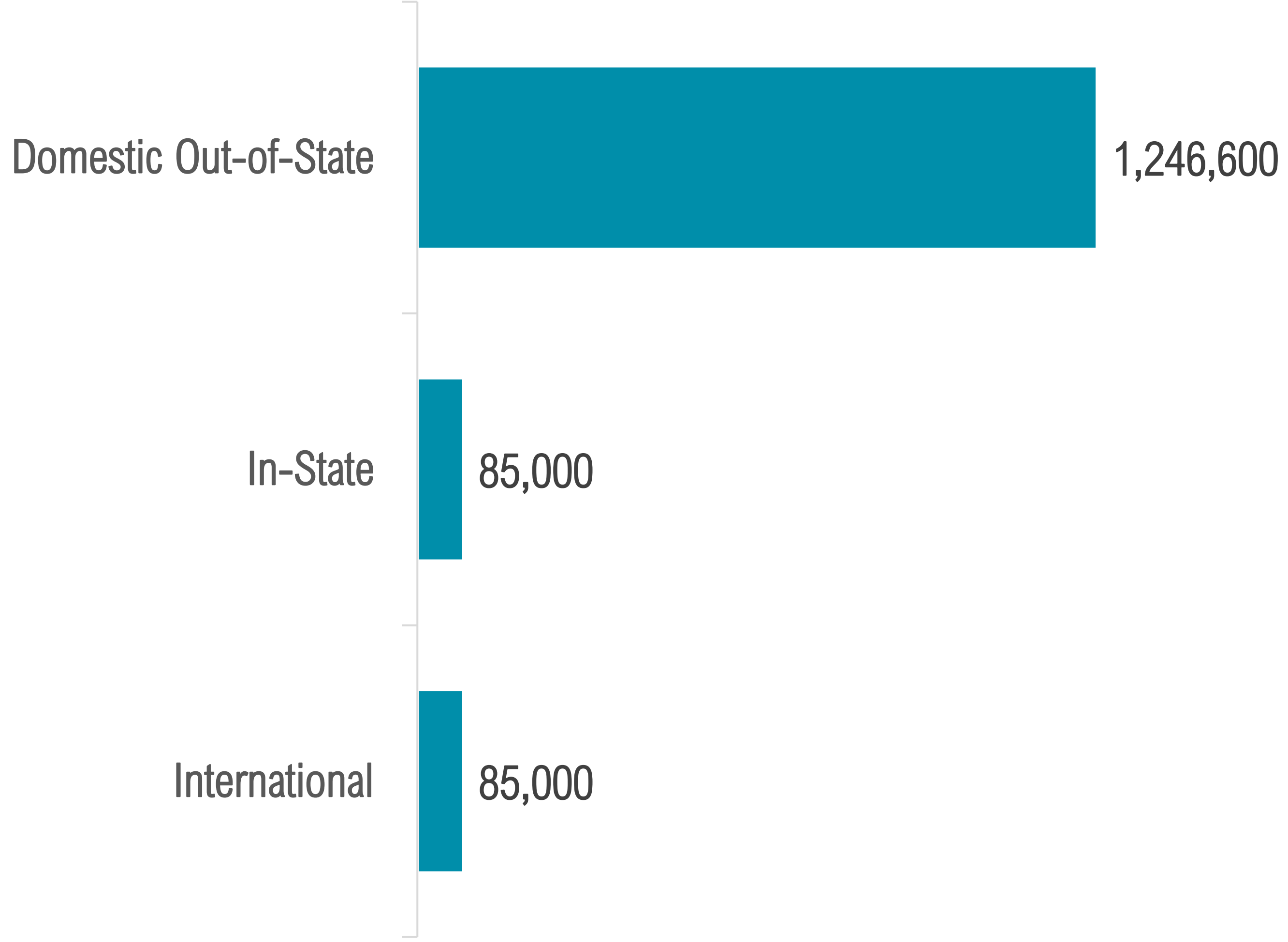


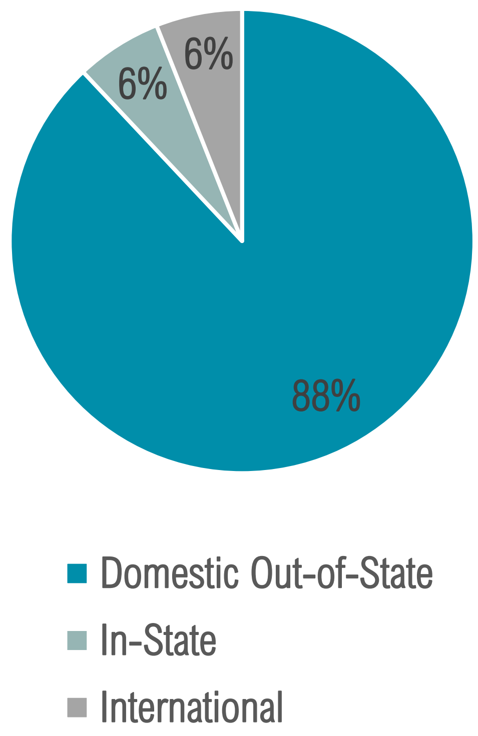
[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers.

NUMBER OF VISITORS BY ORIGIN



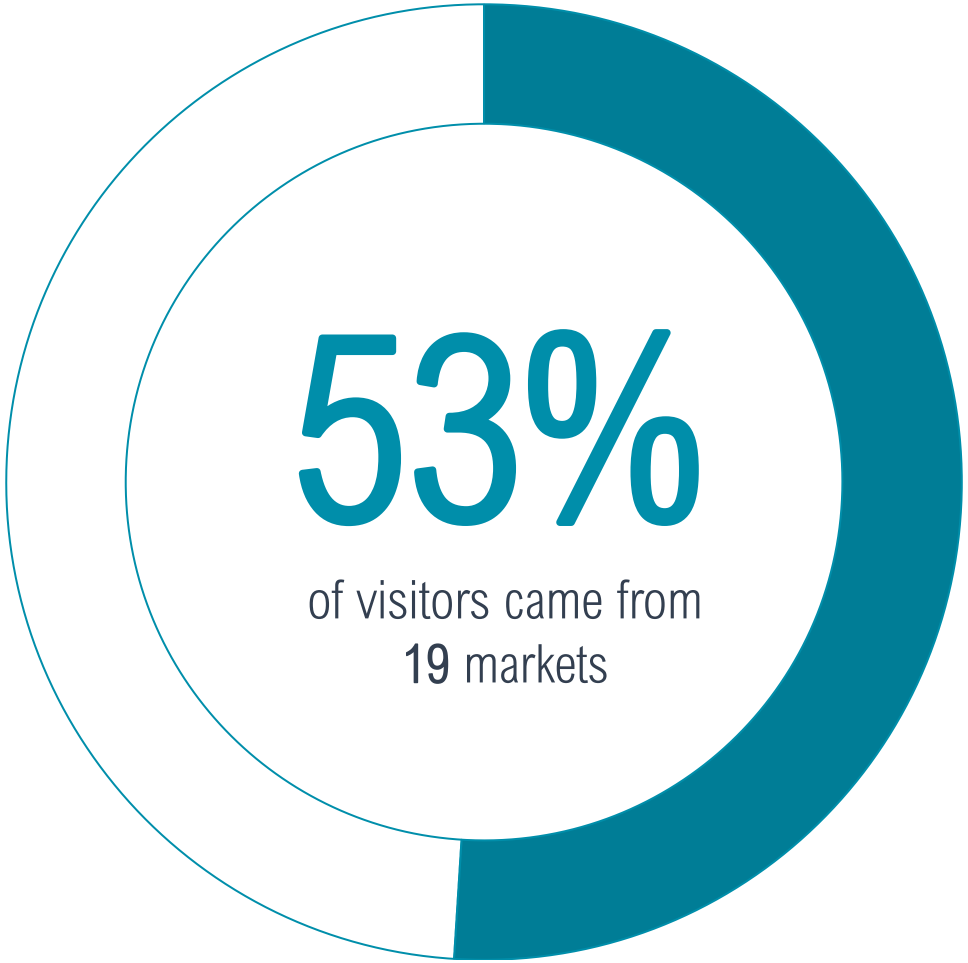
NUMBER OF VISITORS BY ORIGIN





ORIGIN MARKETS[1]

Market	Percentage of Visitors
Minneapolis-Saint Paul	5%
Chicago	5%
Columbus	5%
New York	3%
Detroit	3%
Atlanta	3%
St. Louis	3%
Washington DC	3%
Dallas-Ft. Worth	3%
Boston	2%
Cincinnati	2%
Cleveland-Akron	2%
Grand Rapids	2%
Indianapolis	2%
Nashville	2%
Denver	2%
Jacksonville	2%
Kansas City	2%
Milwaukee	2%



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

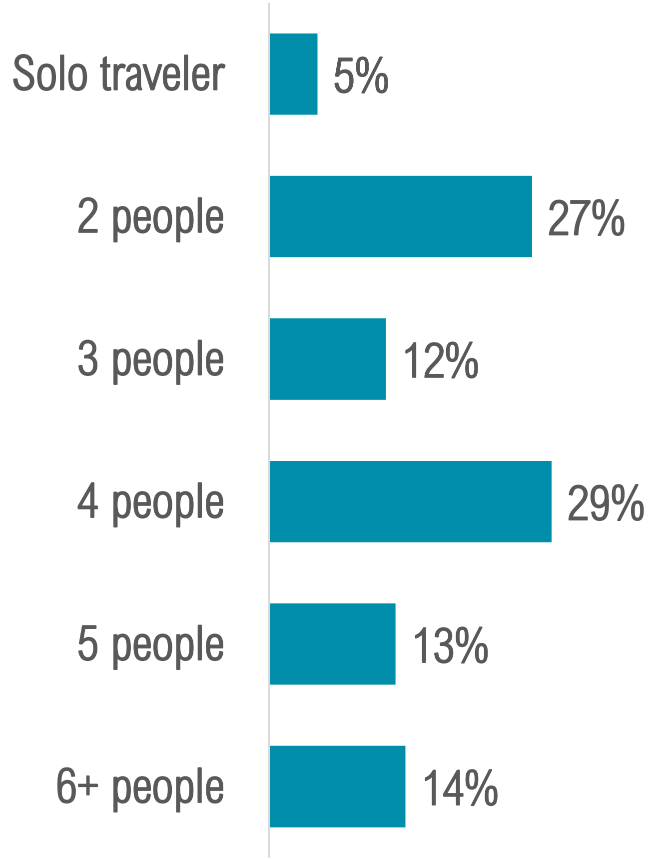
TRAVEL PARTY SIZE AND COMPOSITION

Travel Party Size

Visitors traveled in a party composed of **3.8**[1] **people**.

Travel with Children

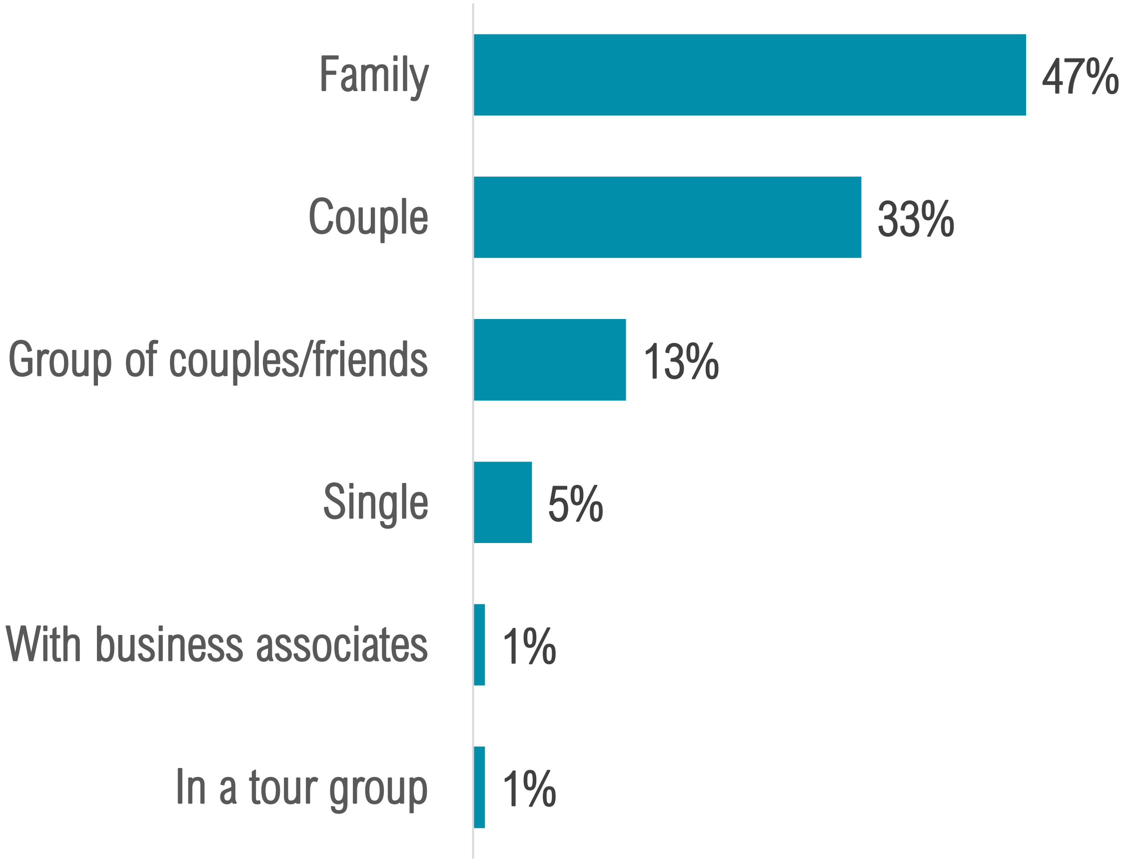
39% of visitors **traveled with children** under the age of 18.



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

TRAVEL PARTY TYPE

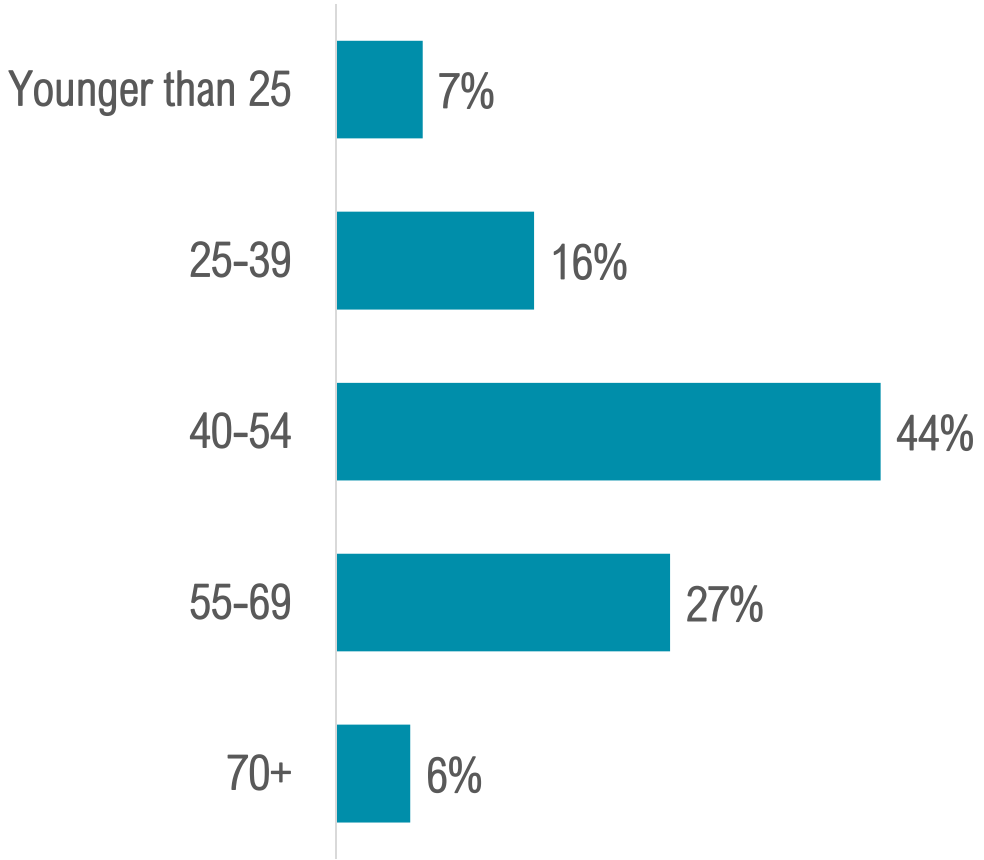
47% of visitors traveled as a family, while 33% traveled as a couple.



AGE

Average Age

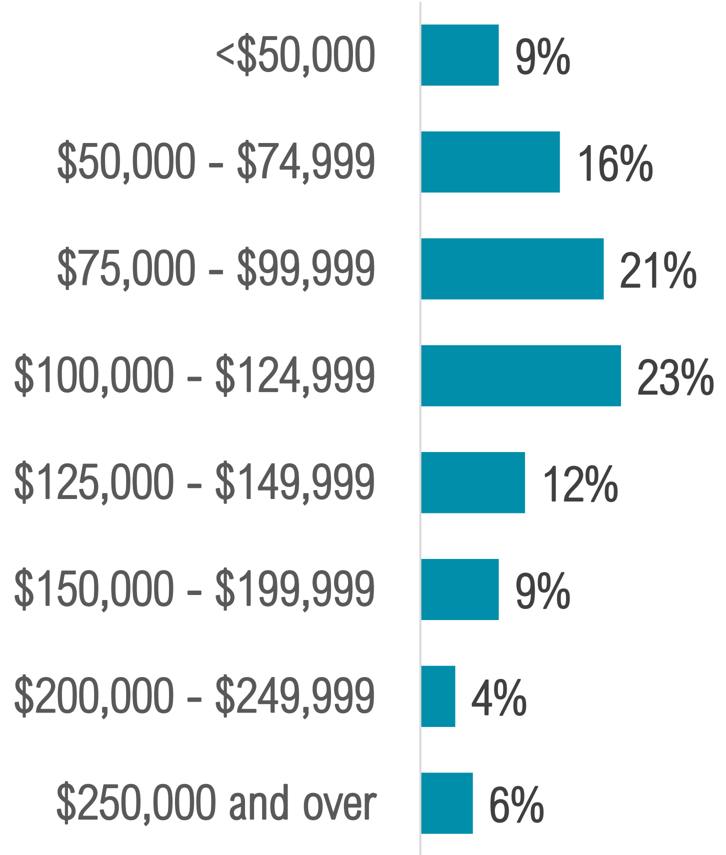
The average age of Apr – June visitors was 50 years old.



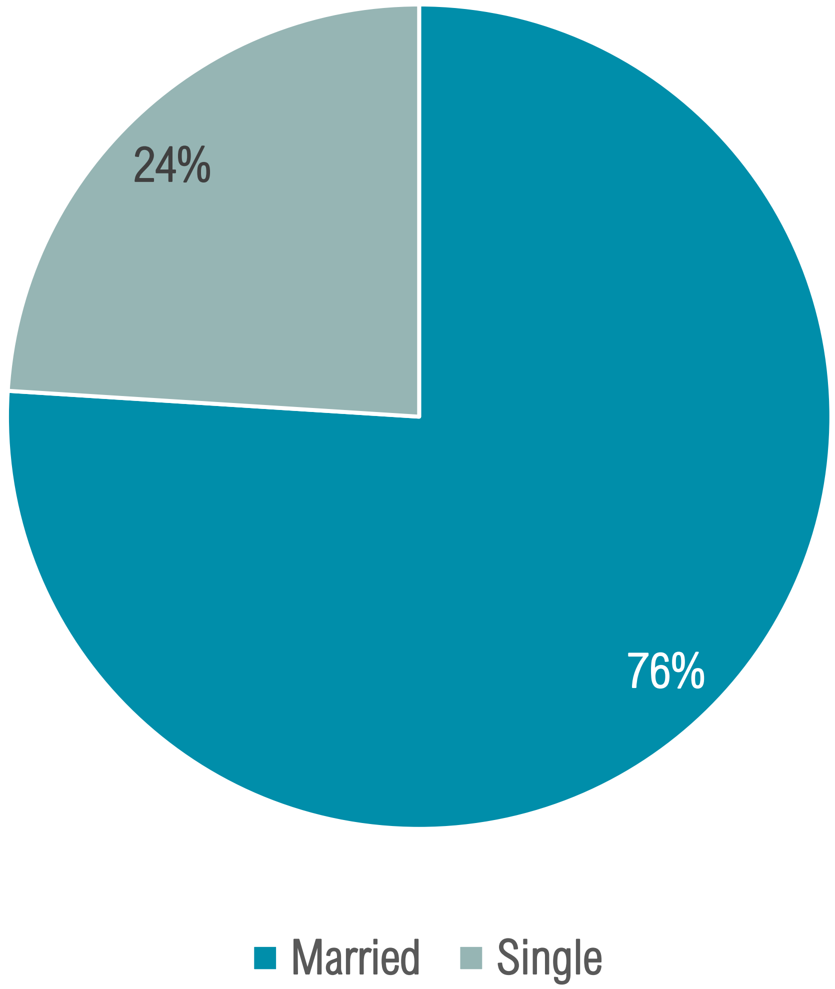
HOUSEHOLD INCOME

Median Household Income

Apr – June visitors had a median household income of **$104,400.**



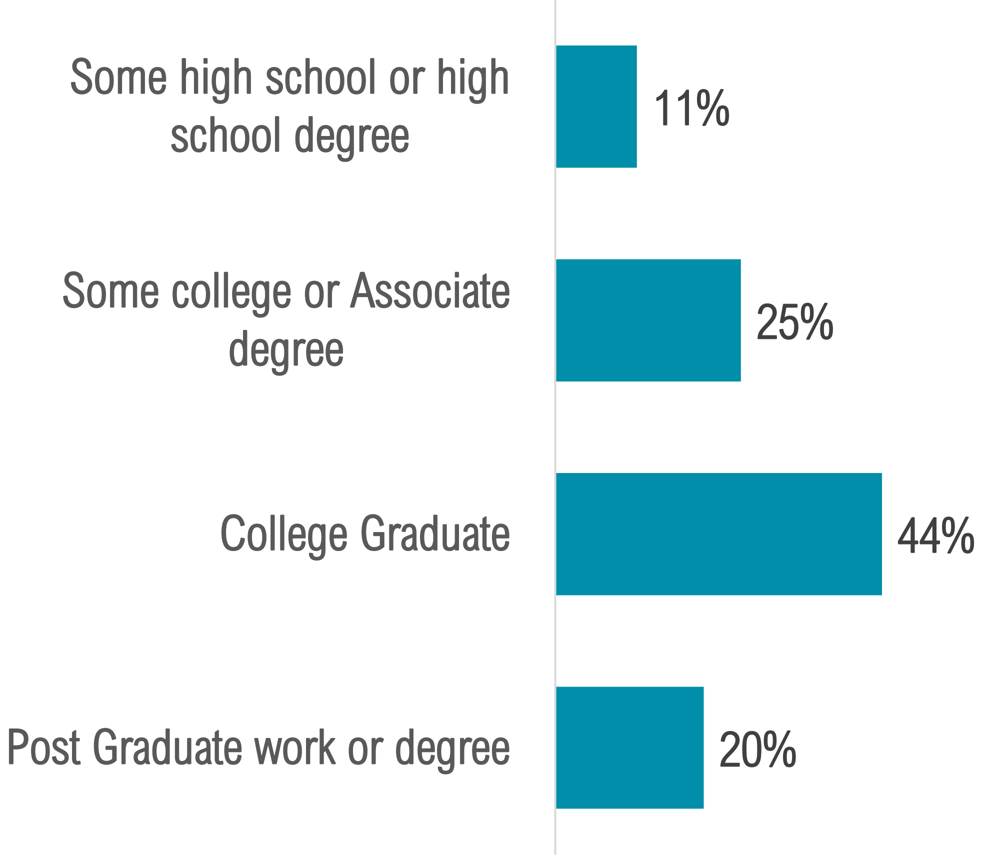
MARITAL STATUS



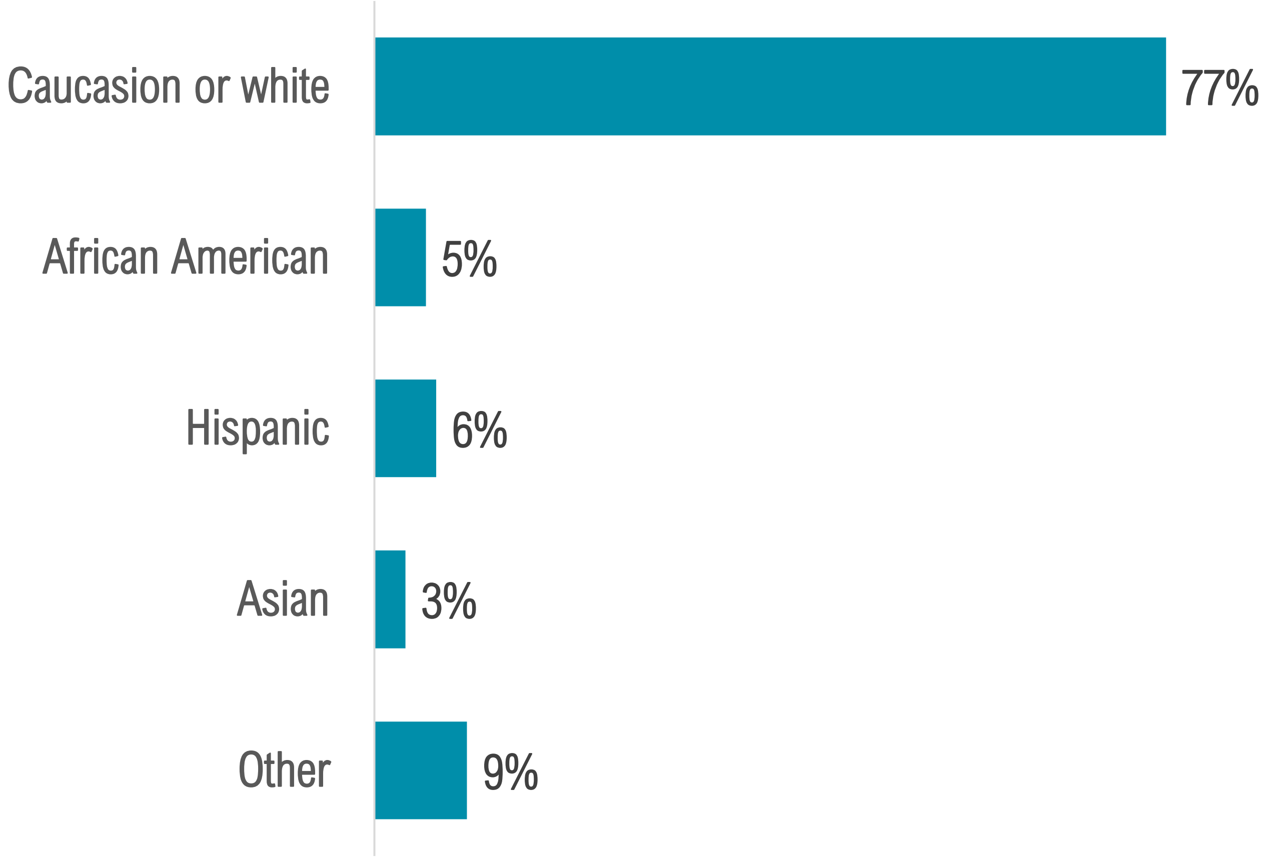
EDUCATION

College Education

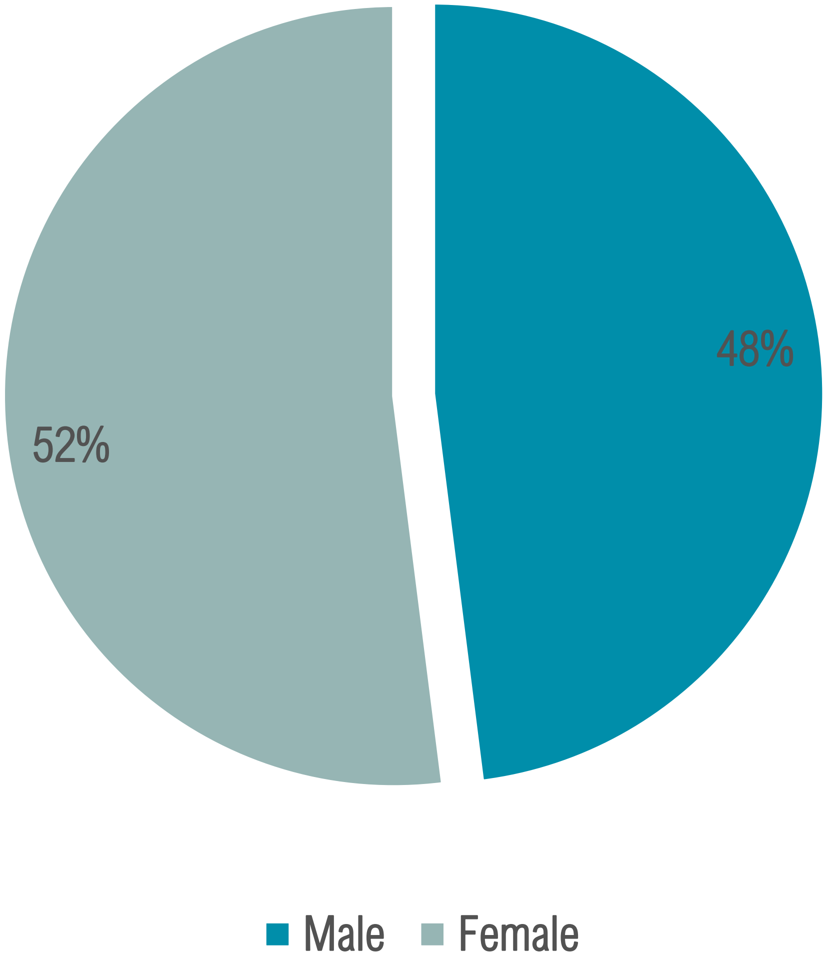
64% of Apr – June visitors were college graduates.



RACE/ETHNICITY



GENDER

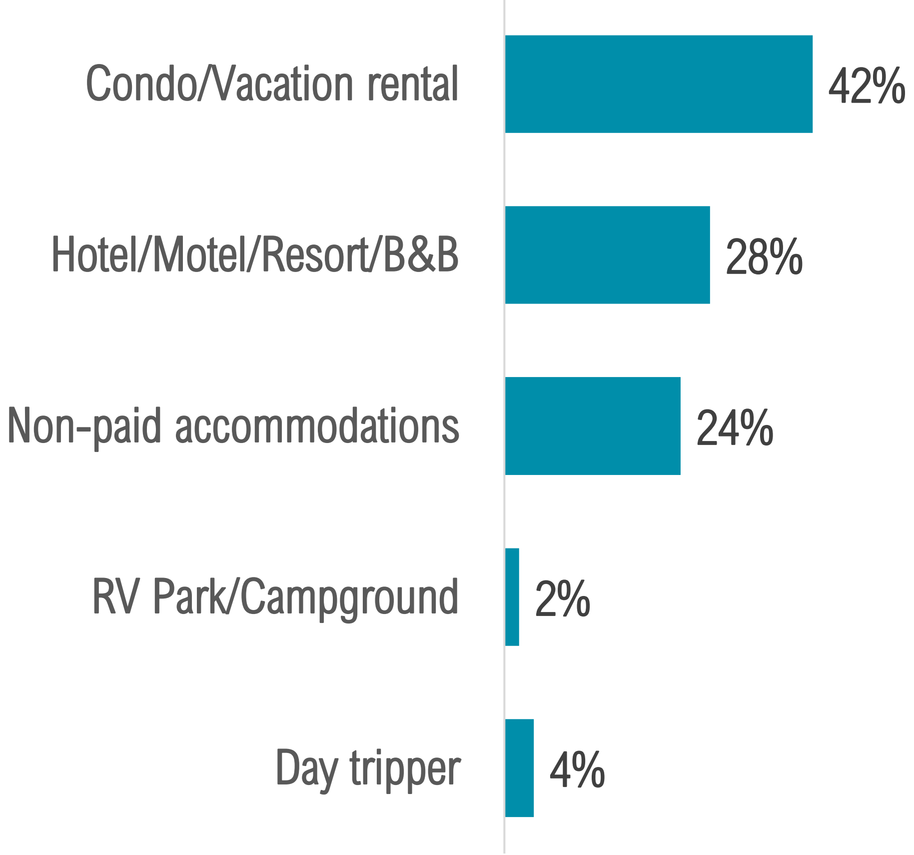


VISITOR JOURNEY: TRIP EXPERIENCE

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

ACCOMMODATIONS

Over 2 in 3 visitors stayed in **paid accommodations** such as a hotel/motel/resort/B&B, condo/vacation rental, or a RV Park/Campground.



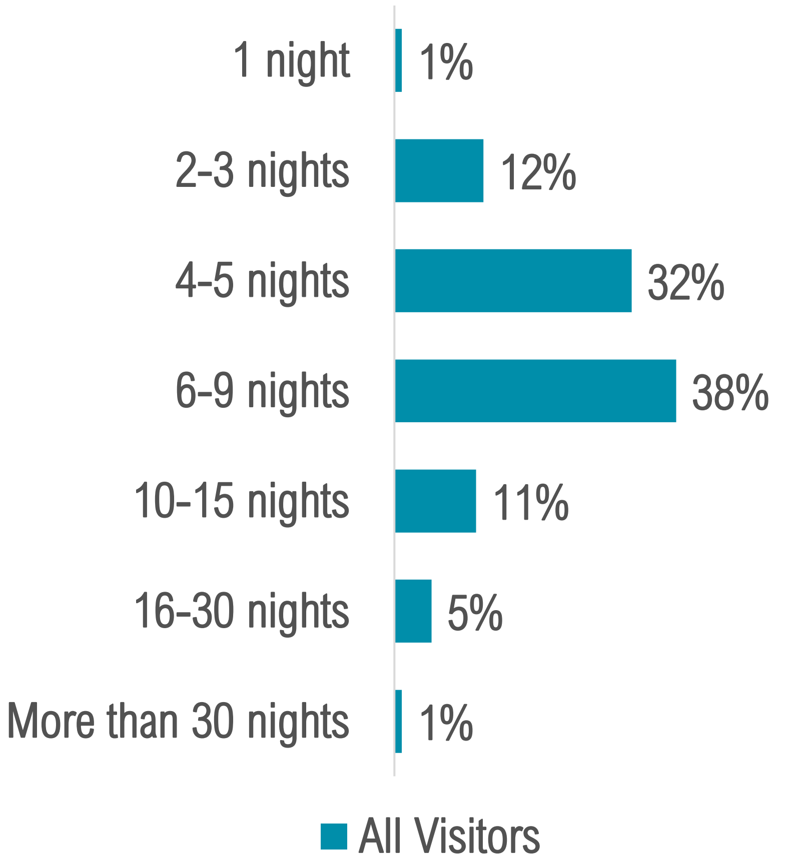
NIGHTS STAYED

All Visitors

Visitors spent **7.2[1] nights** in The Beaches of Fort Myers & Sanibel.

Visitors Staying in Paid Accommodations

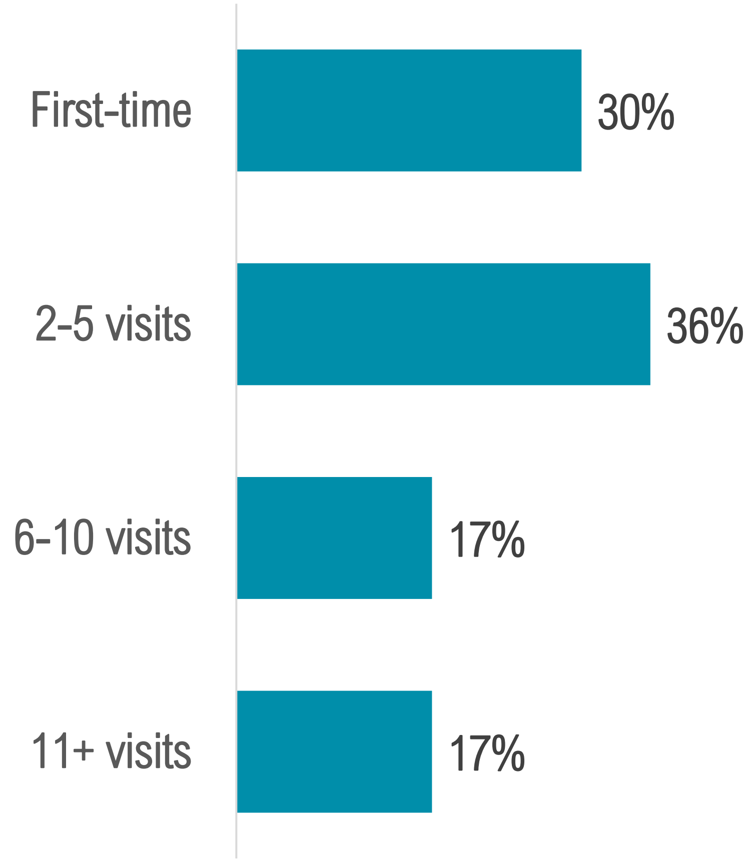
Visitors staying in paid accommodations spent **5.6[2] nights** in The Beaches of Fort Myers & Sanibel.



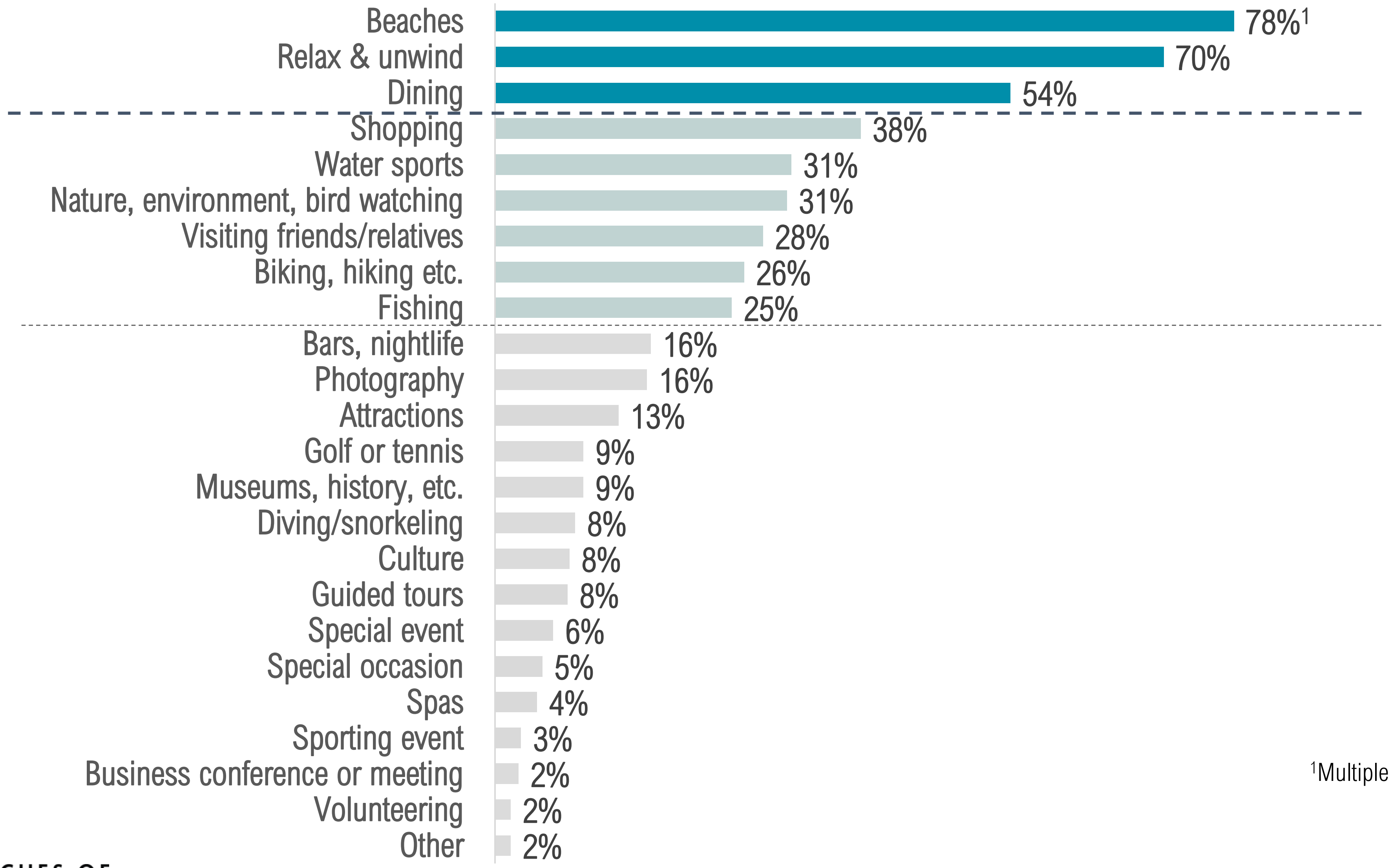
[1]When including extended stay visitors, average nights stayed for all visitors was 9.3 nights.
Source: Visitor Tracking Survey
[2]Source: Occupancy Survey

FIRST TIME AND EXPERIENCED VISITORS

3 in 10 visitors were visiting for the first time, while 1 in 6 were highly loyal visitors, having visited more than 10 times.

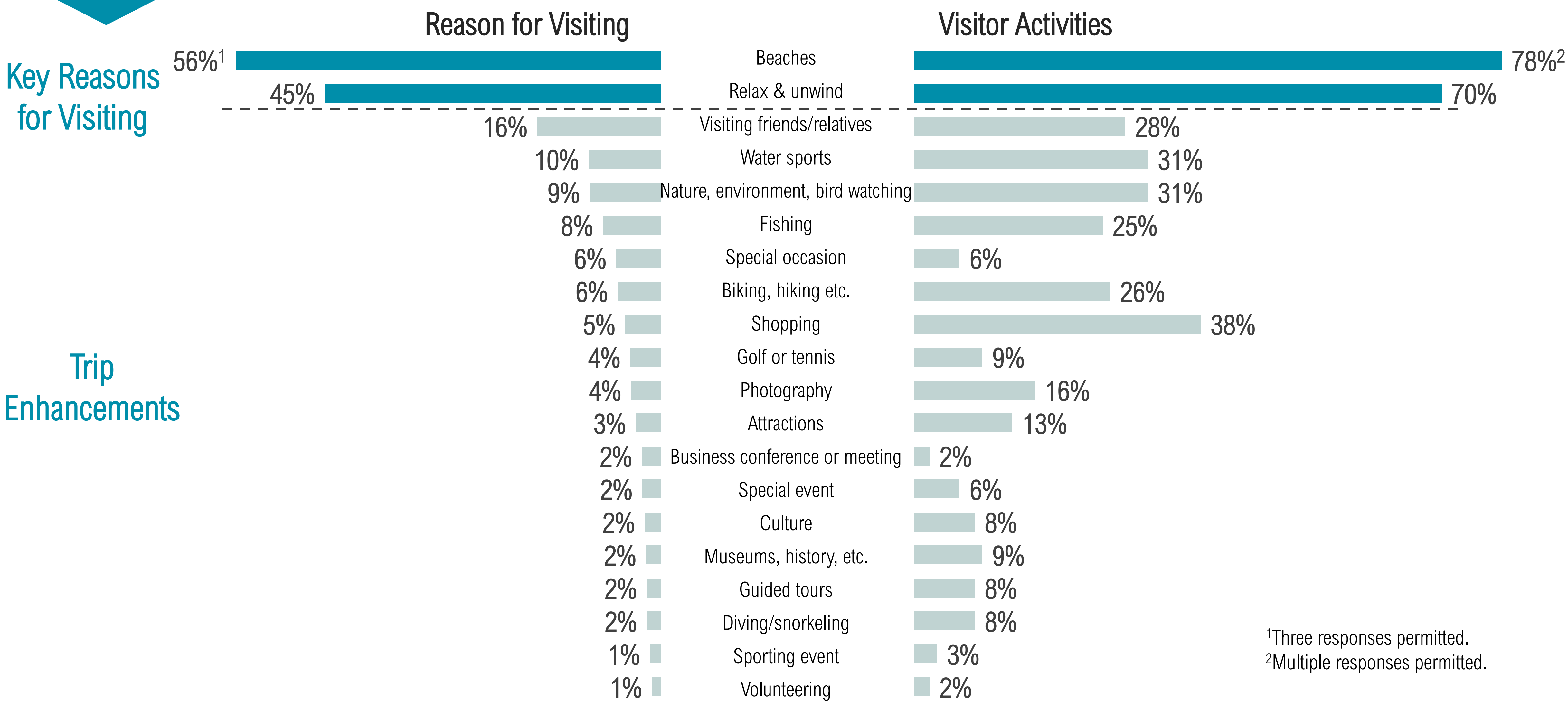


VISITOR ACTIVITIES



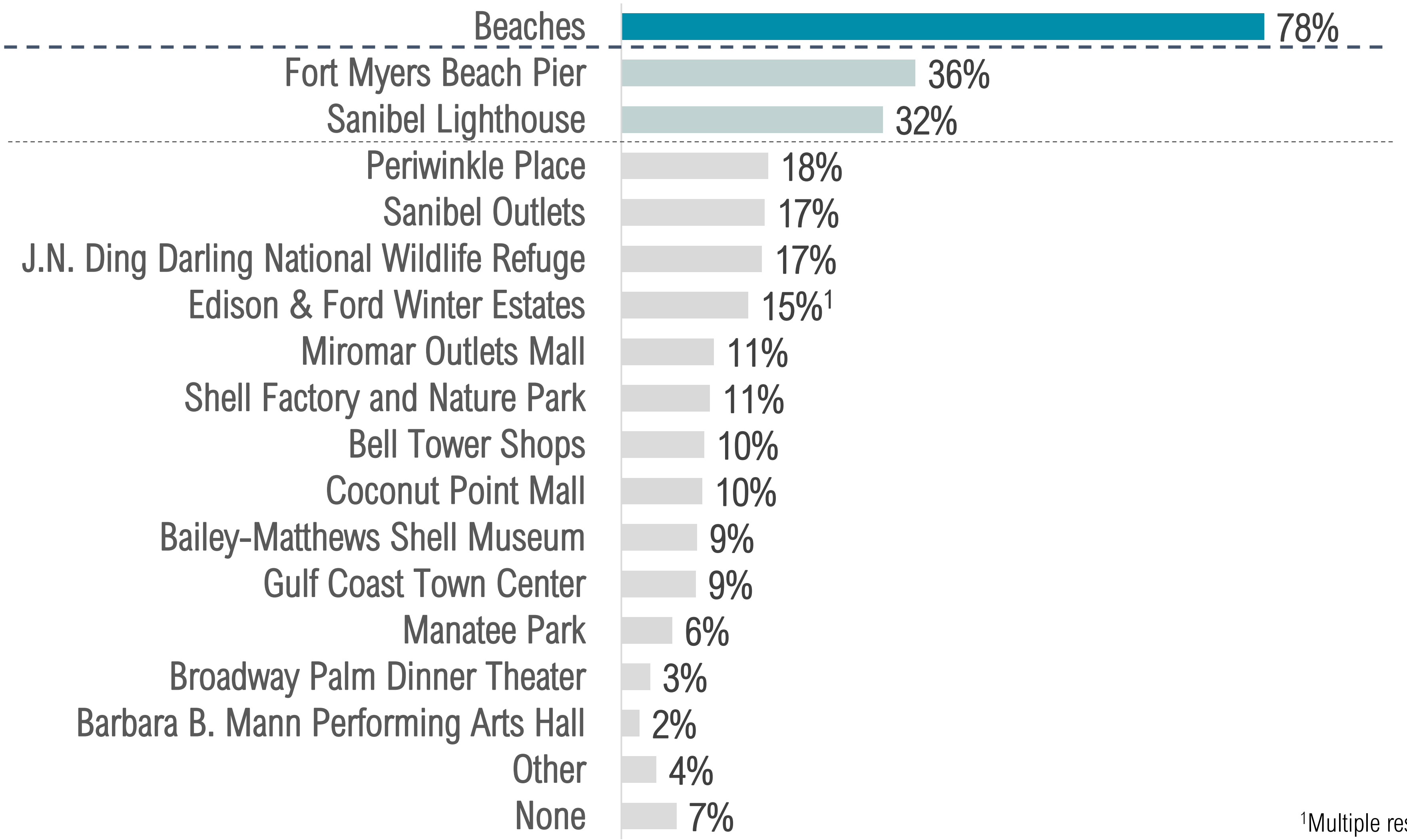
[1]Multiple responses permitted.

REASON FOR VISITING VS. VISITOR ACTIVITIES



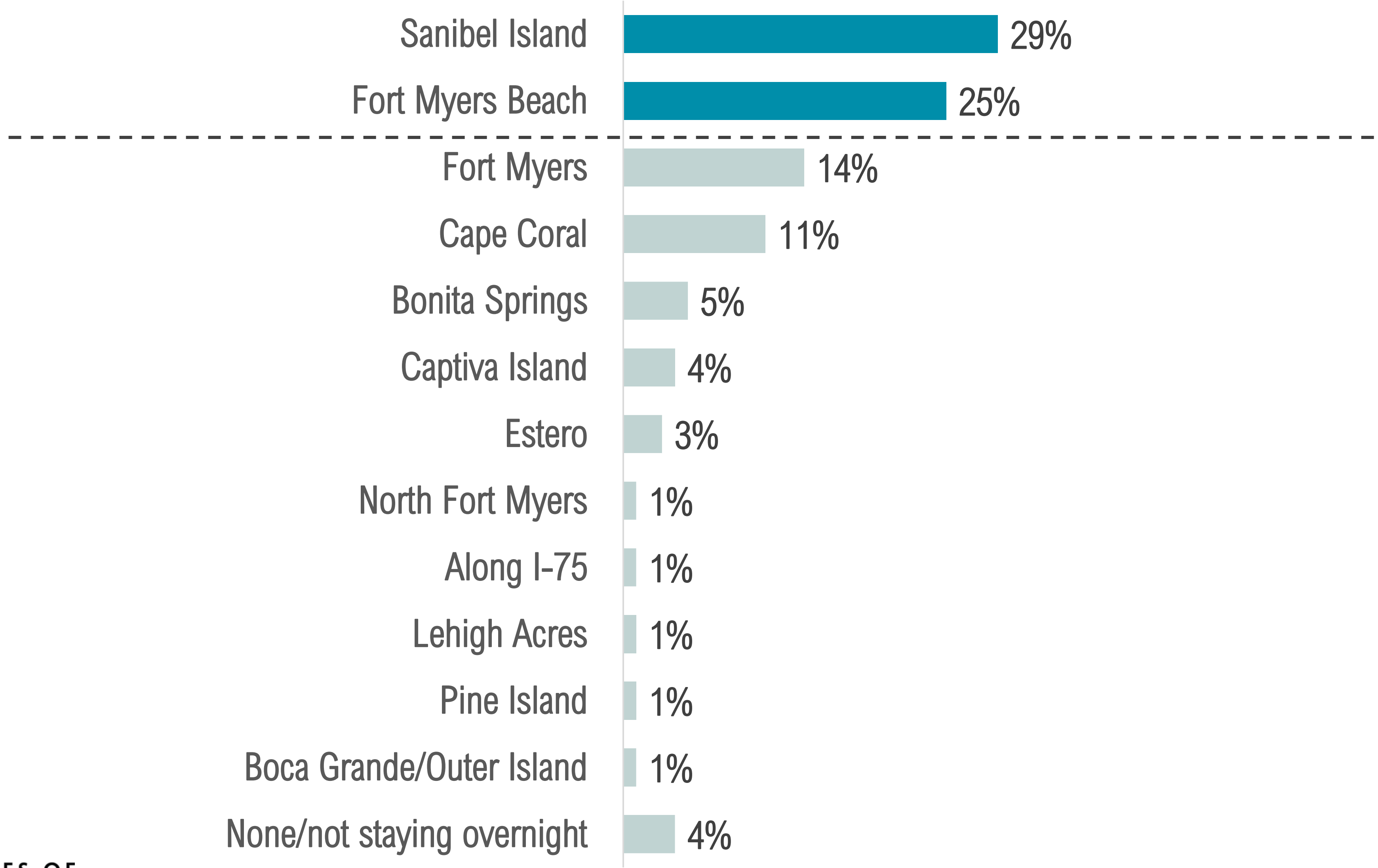
[1]Three responses permitted.
[2]Multiple responses permitted.

ATTRACTIONS VISITED



[1]Multiple responses permitted.

COMMUNITY STAYED



VISITOR JOURNEY: POST-TRIP EVALUATION

Pre-Visit

Travel Party Profile

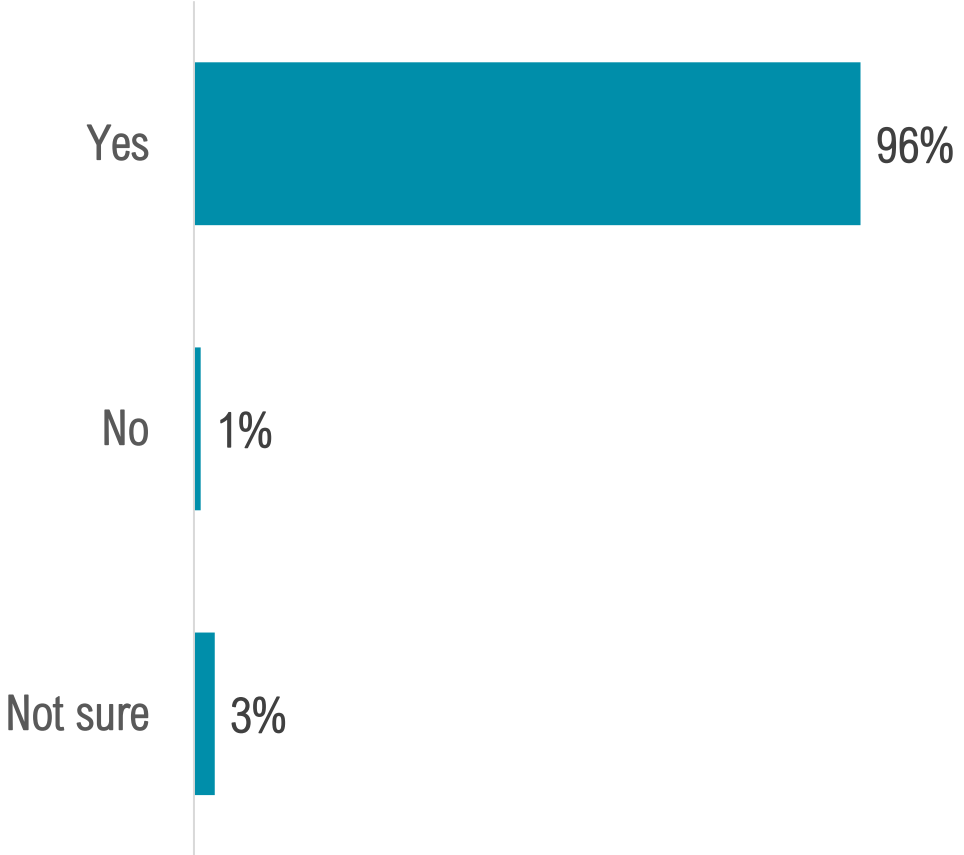
Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

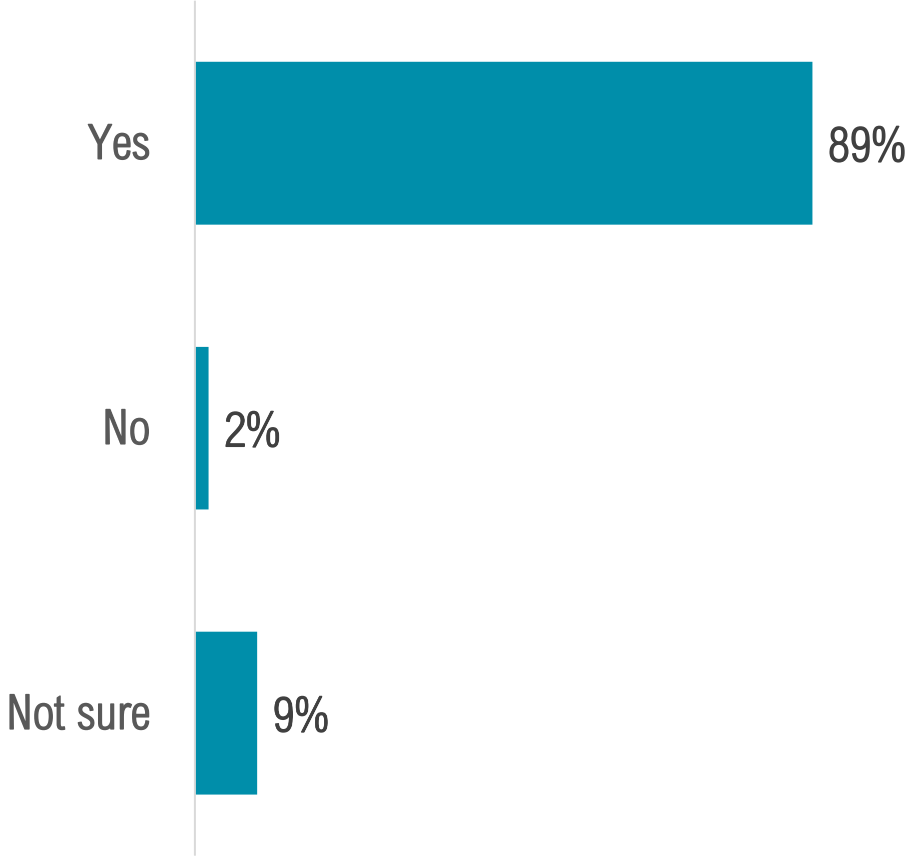
LIKELY TO RECOMMEND

Nearly all visitors are likely to recommend The Beaches of Ft. Myers & Sanibel



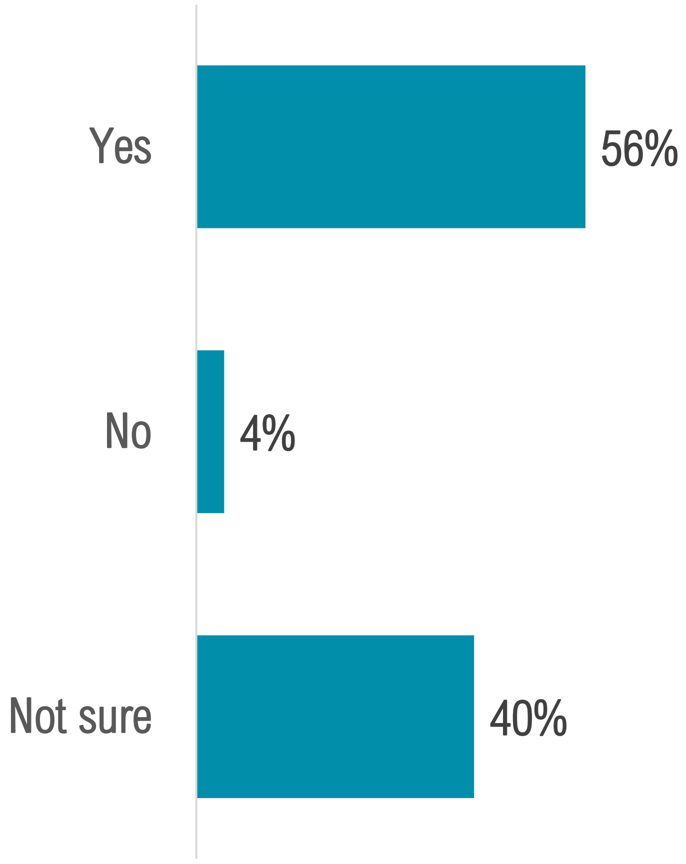
LIKELY TO RETURN

Nearly 9 in 10 visitors are likely to return to The Beaches of Ft. Myers & Sanibel



LIKELY TO RETURN NEXT YEAR

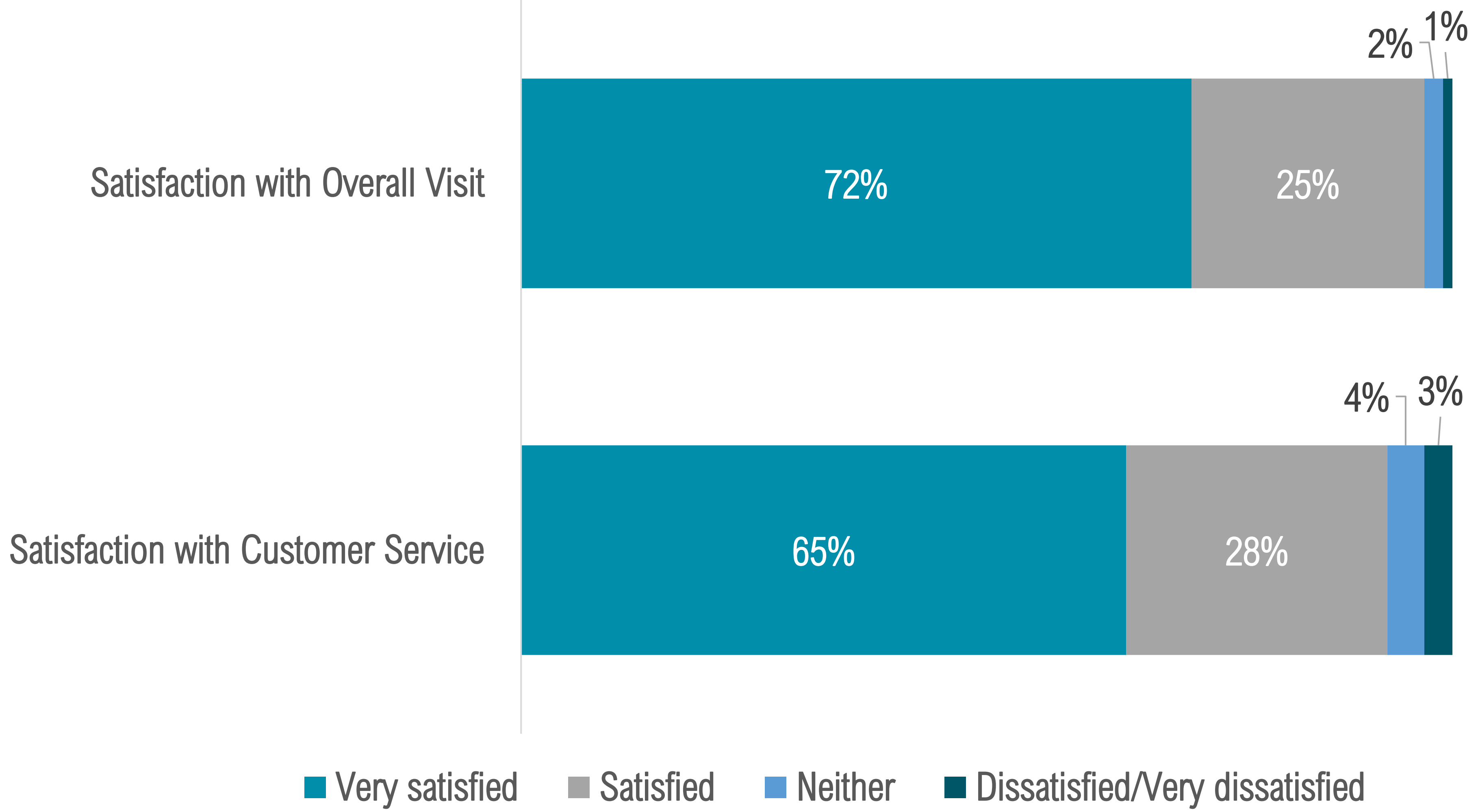
Nearly 3 in 5 visitors are likely to return to The Beaches of Ft. Myers & Sanibel next year



SATISFACTION RATINGS

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2020	2021	2020	2021	2020	2021	2020	2021
Likely to Recommend	92%	92%	93%	98%	93%	96%	86%	96%
Likely to Return	89%	79%	96%	94%	94%	91%	91%	82%
Likely to Return Next Year	48%	33%	78%	64%	70%	57%	60%	30%

SATISFACTION



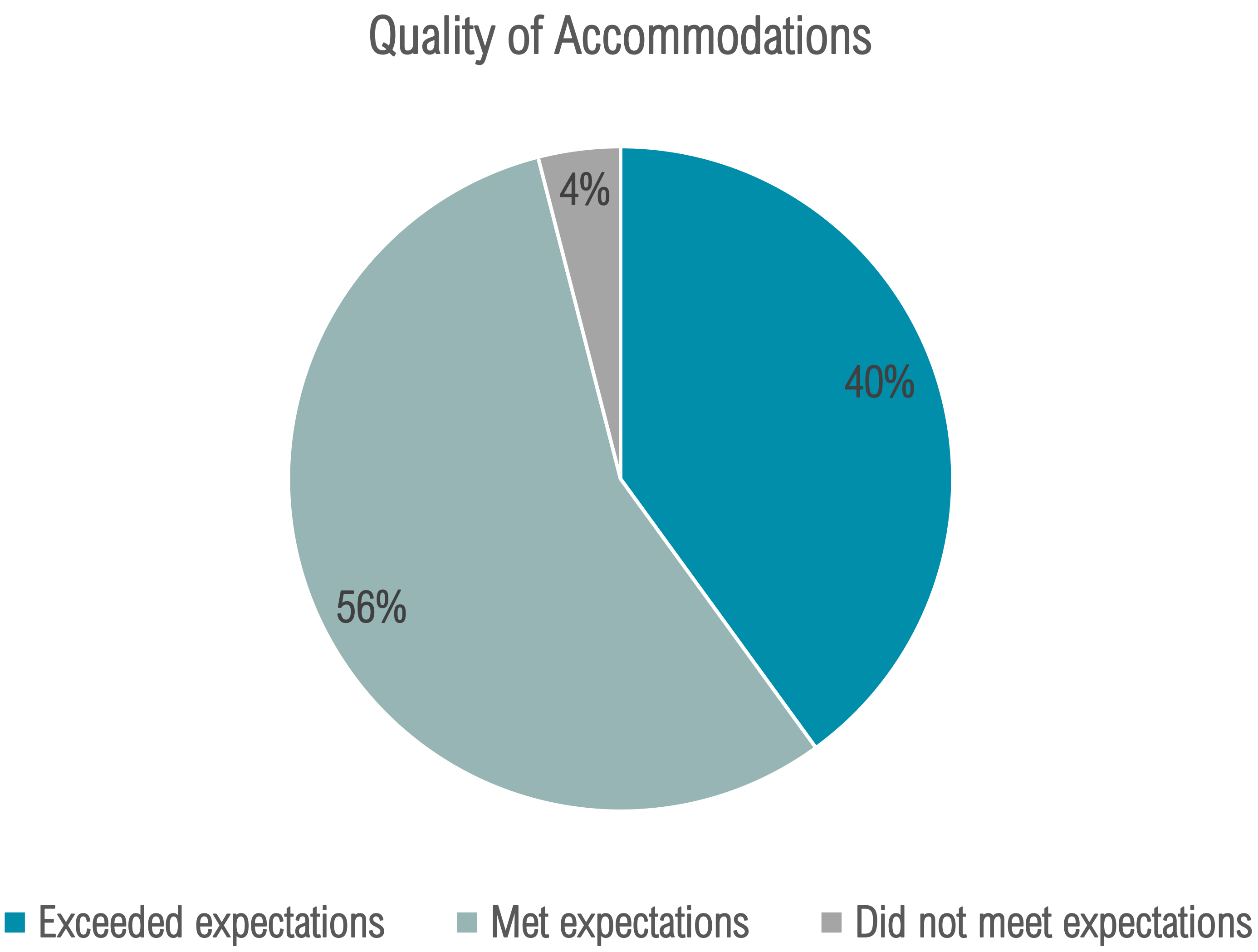
SATISFACTION RATINGS: OVERALL VISIT

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2020	2021	2020	2021	2020	2021	2020	2021
Very Satisfied	68%	65%	74%	77%	71%	73%	74%	56%
Satisfied	28%	29%	22%	22%	26%	24%	24%	41%

SATISFACTION RATINGS: CUSTOMER SERVICE

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2020	2021	2020	2021	2020	2021	2020	2021
Very Satisfied	60%	57%	65%	69%	63%	66%	80%	53%
Satisfied	31%	30%	27%	27%	29%	28%	15%	34%

SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

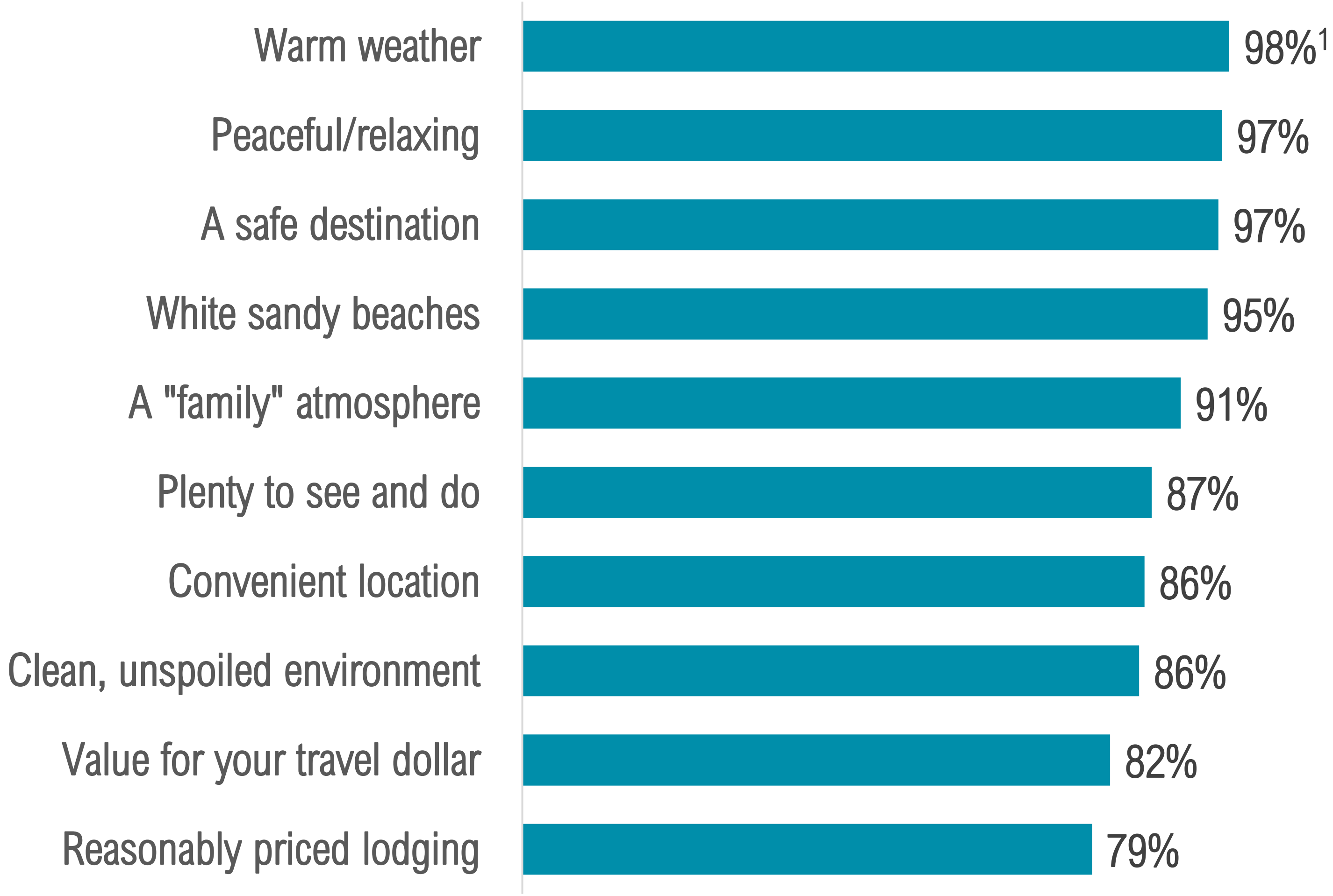


SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2020	2021	2020	2021	2020	2021	2020	2021
Exceeded Expectations	41%	41%	43%	43%	42%	40%	21%	32%
Met Expectations	53%	53%	55%	55%	55%	56%	76%	63%
Did Not Meet Expectations	6%	6%	2%	3%	3%	4%	1%	5%

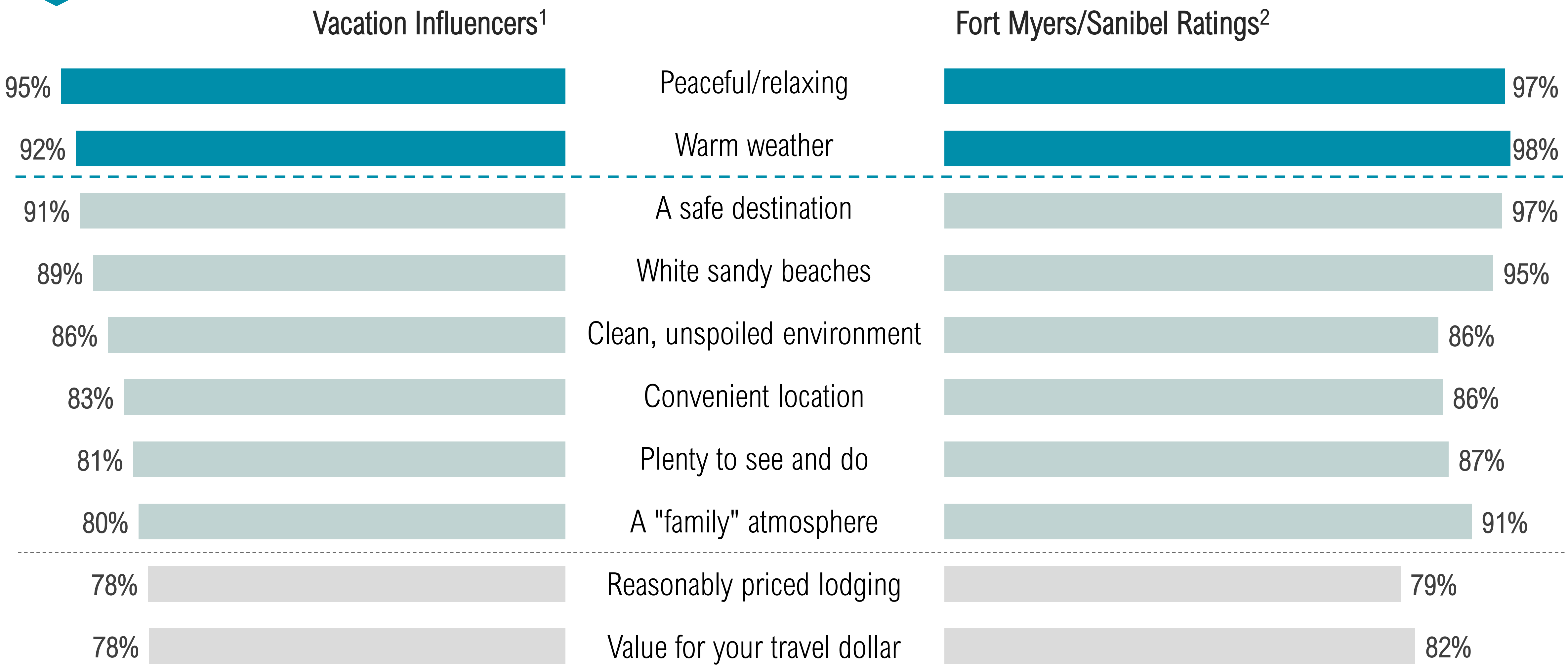
ATTRIBUTE RATINGS

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



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

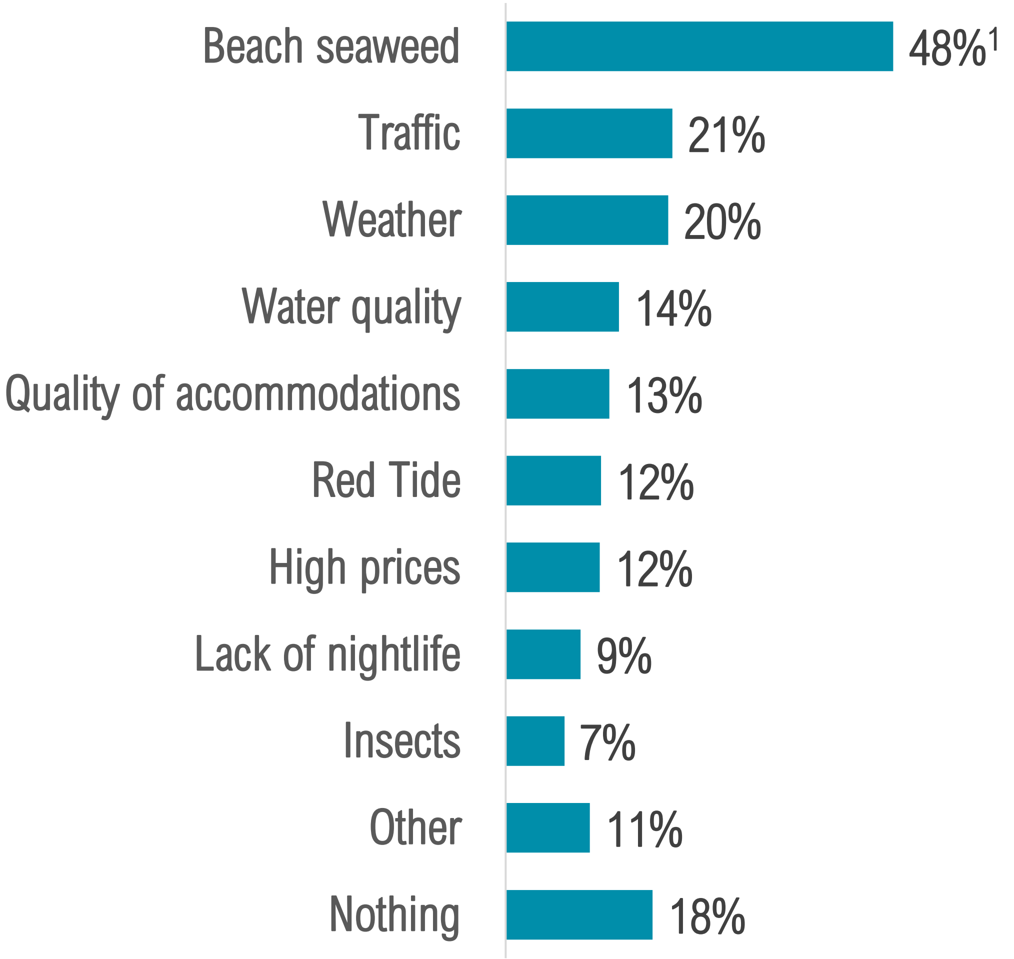
VACATION ATTRIBUTE INFLUENCE VS. RATINGS



[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.

LEAST LIKED FEATURES[2]

Nearly half of visitors indicated **beach seaweed** was the feature they least liked during their visit.



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

AREA DESCRIPTIONS

Visitors describe The Beaches of Fort Myers & Sanibel as having **beautiful beaches** and being a **wonderful place to visit**.

[1]Coded verbatim responses; multiple responses permitted.

AREA DESCRIPTIONS

Wonderful Place to Visit

- "Wonderful vacation. Great weather, crystal clear waters, great kayaking."
- "Great vacation destination, gorgeous coastline, family oriented."
- "Wonderful vacation with beautiful beaches, perfect weather, and great golf courses."
- "Wonderful vacation. Perfect weather, a lot to see and do, and great shopping."
- "Came for a guys weekend away. Great golfing and beaches. Had a great time."

Beautiful Beaches

- "The beaches of Fort Myers and Sanibel are pretty. They are clean and easy to access. I wish there was more parking."
- "The beach was perfect for our family. Waves were mild and the shore was stunning. The best part was that it was not too busy. The atmosphere was quiet, unhurried, and so relaxing."
- "The sandy beach I wish we could bring home. The baby loved playing in the sand."

AREA DESCRIPTIONS

Warm Weather

- “The warm weather is refreshing from the long winter.”
- “Wonderful place that is peaceful, has warm weather, wonderful shelling, swimming, biking and resting. We often take a day or two to head to Lover's Key and to Marco Island for a shelling trip.”
- “Relaxing, warm, peaceful, lots of nature to enjoy!”
- “One of our favorite vacation destinations. Great beaches, tropical atmosphere, and perfect weather.”

Relaxing and Peaceful

- “This location is prime for quiet vacation time; it's not as busy as Miami.”
- “Beautiful and relaxing vacation spot. Spent great time with family and friends while enjoying amazing weather and so much wildlife.”
- “Best shelling, beautiful beaches, abundant sea life, relaxing environment.”
- “Come to visit the mum and spend time at the beach. This place is a relaxing. The vibe is good and pure!”

OCCUPANCY BAROMETER: JULY – SEPTEMBER RESERVATIONS

July – Sept Reservations	July – Sept 2020	July – Sept 2021
Up	0%	72%
Same	3%	24%
Down	97%	1%
Not Sure	0%	3%

OCCUPANCY BAROMETER: OCTOBER – DECEMBER RESERVATIONS

Oct – Dec Reservations	Oct – Dec 2020	Oct – Dec 2021
Up	1%	76%
Same	15%	14%
Down	68%	6%
Not Sure	16%	4%

Year-Over-Year Comparisons

ECONOMIC IMPACT

Visitor & Lodging Statistics	Apr – June 2019	Apr – June 2020	Apr – June 2021	% Change '19 – '21
Visitors	1,262,500	450,200	1,309,300	+3.7%
Room Nights	1,309,000	646,700	1,766,300	+34.9%
Direct Expenditures	$727,686,800	$404,396,500	$996,169,300	+36.9%
Total Economic Impact	$1,181,763,400	$656,739,900	$1,587,893,900	+34.4%
Occupancy	63.6%	36.6%	74.8%	+17.8%
ADR	$130.52	$116.73	$160.77	+23.2%
RevPAR	$83.01	$42.72	$120.33	+45.0%

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM

	Apr – June 2019	Apr – June 2020	Apr – June 2021	% Change '19-'21
Direct Jobs	9,795	5,371	13,389	+36.7%
Total Jobs	13,616	7,498	18,738	+35.0%
Direct Wages	$227,418,700	$120,482,300	$299,921,900	+31.9%
Total Wages	$371,877,000	$206,300,000	$492,541,200	+32.4%
Direct Local Taxes	$23,213,200	$12,981,100	$30,383,100	+30.9%
Total Local Taxes	$41,716,300	$24,036,700	$53,670,800	+28.7%
Direct State Taxes	$51,738,500	$28,307,800	$70,827,600	+36.9%
Total State Taxes	$77,760,000	$43,344,800	$104,007,000	+33.8%

VISITOR TYPE

Visitor Type	Apr – June 2020	Apr – June 2021
Visitors in Paid Accommodations	66%	72%
Visitors in Non-Paid Accommodations	30%	24%
Day Trippers	4%	4%

PRE-VISIT

Planned trip in advance	Apr – June 2020	Apr – June 2021
1 week or less	9%	4%
2-4 weeks	15%	13%
1-2 months	24%	31%
3-6 months	25%	32%
6 months or more	27%	20%

Considered Other Destinations	Apr – June 2020	Apr – June 2021
Yes	19%	25%
No	81%	75%

PRE-VISIT

Trip Planning Websites/Apps[1]	Apr – June 2020	Apr – June 2021
Airbnb, VRBO, HomeAway	16%	32%
Search engines	23%	30%
Airline websites/apps	23%	26%
Vacation rental websites/apps	14%	22%
Booking websites/apps	18%	21%
Trip Advisor	16%	18%
Hotel websites/apps	19%	16%
Travel reviews, blogs, stories, etc.	9%	13%
VCB Social Media	12%	11%
Visit Florida	15%	8%
www.FortMyers-Sanibel.com	14%	8%
Facebook	11%	8%
Instagram	5%	6%
YouTube, Hulu, Pandora	6%	5%
None/Don't visit websites	19%	16%
Other	5%	4%

[1]Multiple responses permitted.

PRE-VISIT

Information Requests[1]	Apr – June 2020	Apr – June 2021
Call hotel/motel/condo	15%	26%
Visitor guide	10%	8%
Call VCB	8%	4%
Fort Myers-Sanibel E-newsletter	9%	3%
Call local Chamber of Commerce	7%	3%
Other	5%	2%
None/Did not request info	71%	63%

[1]Multiple responses permitted.

PRE-VISIT

Recall of Lee County Promotions	Apr – June 2020	Apr – June 2021
Yes	38%	41%
No	47%	44%
Can't recall	15%	15%

Characteristics influencing visit to Lee County (top 2 boxes)	Apr – June 2020	Apr – June 2021
Peaceful/relaxing	89%	95%
Warm weather	87%	92%
A safe destination	86%	91%
White sandy beaches	83%	89%
Clean, unspoiled	81%	86%
Convenient location	79%	83%
Plenty to see and do	79%	81%
A "family" atmosphere	73%	80%
Value for your travel dollar	72%	78%
Reasonably priced lodging	71%	78%

PRE-VISIT

Transportation	Apr – June 2020	Apr – June 2021
Fly	61%	77%
Drive a personal vehicle	32%	19%
Drive a rental vehicle	4%	2%
Drive a RV	1%	1%
Travel by bus	0%	1%
Other	0%	0%

Airport Used	Apr – June 2020	Apr – June 2021
Southwest Florida International	77%	81%
Punta Gorda	8%	7%
Miami International	5%	3%
Orlando International	3%	3%
Ft. Lauderdale International	3%	3%
Tampa International	2%	2%
Other	1%	1%

TRAVEL PARTY PROFILE

Visitor Origin	Apr – June 2020	Apr – June 2021
Florida	14%	6%
Southeast	15%	20%
Northeast	19%	15%
Midwest	35%	44%
West	7%	9%
Canada	4%	2%
United Kingdom	1%	0.2%
Germany	2%	0.8%
Other Europe	1%	1%
Other international	1%	2%

TRAVEL PARTY PROFILE

Travel Parties	Apr – June 2020	Apr – June 2021
Mean travel party size	3.6[1]	3.8[1]
Travel with children under age 18	30%	39%

Travel Party Composition	Apr – June 2020	Apr – June 2021
Family	38%	47%
Couple	38%	33%
Group of couples/friends	11%	13%
Single	10%	5%
In a tour group	2%	1%
With business associates	1%	1%

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

TRAVEL PARTY PROFILE

Marital Status	Apr – June 2020	Apr – June 2021
Married	72%	76%
Single	28%	24%
Other	0%	0%

Age	Apr – June 2020	Apr – June 2021
Average age	49	50

Household Income	Apr – June 2020	Apr – June 2021
Median Income	$97,200	$104,400

TRIP EXPERIENCE

Length of Stay	Apr – June 2020	Apr – June 2021
Average nights in The Beaches of Fort Myers & Sanibel	7.8[1]	7.2[1]

First time/Repeat Visitors	Apr – June 2020	Apr – June 2021
First-time	26%	30%
Repeat	74%	70%

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

TRIP EXPERIENCE

Activities[1]	Apr – June 2020	Apr – June 2021
Beaches	68%	78%
Relax & unwind	67%	70%
Dining	56%	54%
Shopping	36%	38%
Nature, environment, bird watching	28%	31%
Water sports	15%	31%
Visiting friends/relatives	32%	28%
Biking, hiking etc.	15%	26%
Fishing	17%	25%
Bars, nightlife	14%	16%
Photography	14%	16%
Attractions	16%	13%
Golf or tennis	8%	9%
Museums, history, etc.	6%	9%
Guided tours	10%	8%
Culture	9%	8%
Diving/snorkeling	7%	8%
Special event	6%	6%
Special occasion	5%	5%
Spas	3%	4%
Sporting event	4%	3%
Business conference or meeting	3%	2%
Volunteering	1%	2%
Other	3%	2%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Attractions[1]	Apr – June 2020	Apr – June 2021
Beaches	69%	78%
Fort Myers Beach Pier	35%	36%
Sanibel Lighthouse	29%	32%
Periwinkle Place	11%	18%
Sanibel Outlets	20%	17%
J.N. Ding Darling National Wildlife Refuge	14%	17%
Edison & Ford Winter Estates	17%	15%
Miromar Outlets Mall	15%	11%
Shell Factory and Nature Park	13%	11%
Coconut Point Mall	11%	10%
Bell Tower Shops	10%	10%
Gulf Coast Town Center	7%	9%
Bailey-Matthews Shell Museum	4%	9%
Manatee Park	10%	6%
Broadway Palm Dinner Theater	3%	3%
Barbara B. Mann Performing Arts Hall	3%	2%
Other	4%	4%
None	9%	7%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Area stayed	Apr – June 2020	Apr – June 2021
Sanibel Island	25%	29%
Fort Myers Beach	18%	25%
Fort Myers	19%	14%
Cape Coral	17%	11%
Bonita Springs	4%	5%
None/not staying overnight	4%	4%
Captiva Island	3%	4%
Estero	3%	3%
North Fort Myers	2%	1%
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 2020	Apr – June 2021
Likely to recommend	92%	96%
Likely to return	94%	89%
Likely to return next year	70%	56%

Satisfaction with Accommodations	Apr – June 2020	Apr – June 2021
Exceeded expectations	41%	40%
Met expectations	56%	56%
Did not meet expectations	3%	4%

POST-TRIP EVALUATION

Satisfaction with Visit	Apr – June 2020	Apr – June 2021
Very satisfied	71%	72%
Satisfied	25%	25%
Neither	2%	2%
Dissatisfied/Very dissatisfied	1%	1%
Don't know	1%	0%

Satisfaction with Customer Service	Apr – June 2020	Apr – June 2021
Very satisfied	63%	65%
Satisfied	28%	28%
Neither	5%	4%
Dissatisfied/Very dissatisfied	1%	3%
Don't know	3%	0%

POST-TRIP EVALUATION

Least Liked Features[1]	Apr – June 2020	Apr – June 2021
Beach seaweed	17%	48%
Traffic	32%	21%
Weather	7%	20%
Water quality	11%	14%
Quality of accommodations	4%	13%
High prices	14%	12%
Red Tide	12%	12%
Lack of nightlife	7%	9%
Insects	23%	7%
Other	5%	11%
No concerns	27%	18%

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

Methodology

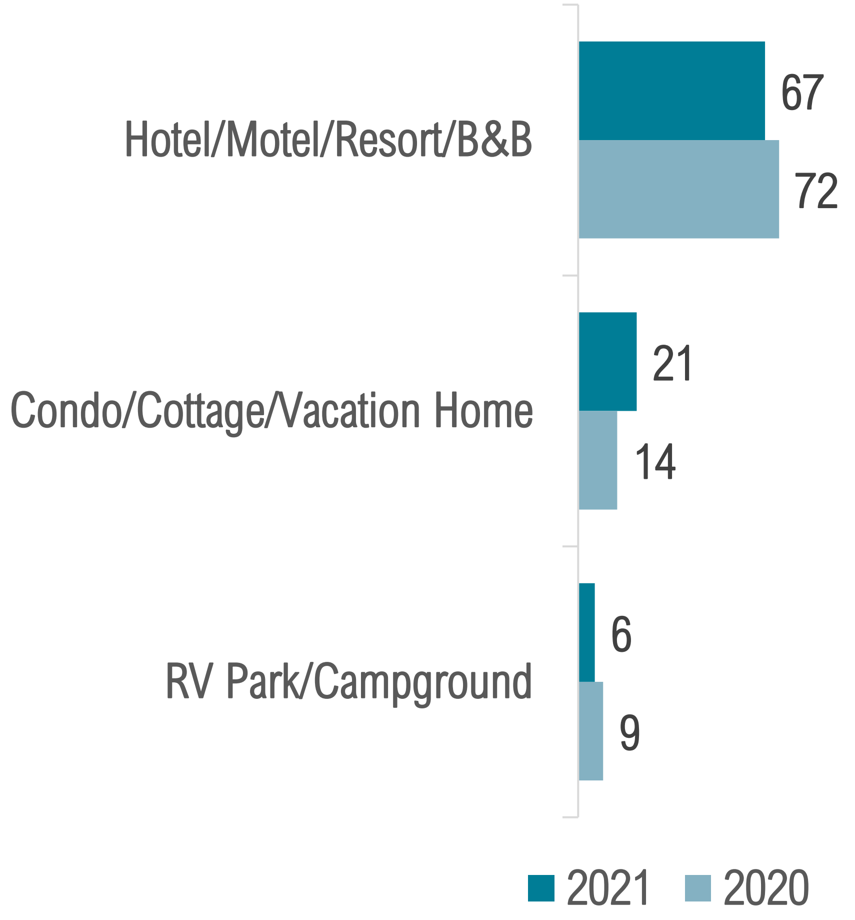
METHODOLOGY

- Economic Impact of tourism in Lee County is derived from:
  - Visitor Tracking Study
    - Internet survey & in-person interviews in public areas, hotels, & at events around Lee County
    - Sample size: 1,063 completed interviews
    - Target individuals: April – June visitors to Lee County
    - Data Collection: April 2021 – June 2021
  - Occupancy Study
    - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc., and the STR Report
    - Sample Size – data from 8,737 hotel/rental/campground units (94 properties) reporting to DSG, 10,547 hotel units reporting to STR (87 properties), and 17,107 rental unit listings on Key Data
  - 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

METHODOLOGY

- Occupancy Study
  - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc.
    - Sample Size – 94 completed interviews
    - Data Collection: July 2021 (for Apr – June 2021)
  - Total Sample Size – data from 8,737 hotel/rental/campground units reporting to DSG, 10,547 hotel units reporting to STR (representing 87 properties), and 17,107 rental unit listings on Key Data

Number of Interviews



METHODOLOGY

- **1,063** visitor interviews were completed in the following areas:

273	Fort Myers Beach: The Pier, Times Square
402	Fort Myers: Centennial Park, RSW, Edison-Ford Winter Estates, Hampton Inn & Suites Fort Myers
214	Sanibel: Lighthouse Beach, Sanibel Moorings Resort
136	Cape Coral/North Fort Myers: Yacht Club Community Park
38	Bonita Springs: Bonita Beach, Estero

The Beaches of Fort Myers & Sanibel

Lee County VCB

April – June 2021

Visitor Tracking & Occupancy Study

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THE BEACHES OF FORT MYERS AND SANIBEL

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