

# The Beaches of Fort Myers & Sanibel

Lee County VCB

January – March 2021

Visitor Tracking, Occupancy & Economic Impact Study

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# Introduction



# STUDY OBJECTIVES: MAP THE VISITOR JOURNEY



# Executive Summary





# TOURISM SNAPSHOT: NARRATIVE

- Tourism is recovering, but metrics still lag behind pre-pandemic figures
- More visitors traveled as a family to The Beaches of Ft. Myers and Sanibel this quarter compared to 2020
  - More visitors traveled with children this quarter compared to 2020
- More visitors used VCB resources to plan their trips this quarter, including [www.FortMyers-Sanibel.com](http://www.FortMyers-Sanibel.com), The Beaches of Ft. Myers & Sanibel social media, calling the VCB, looking at the visitor guide, and viewing the VCB e-newsletter



# VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION



# TOURISM SNAPSHOT: KEY METRICS

| Visitor & Lodging Statistics       | Jan – Mar 2020  | Jan – Mar 2021  | % Change '20-'21    |
|------------------------------------|-----------------|-----------------|---------------------|
| Visitors                           | 1,091,300       | 913,800         | -16.3% <sup>1</sup> |
| Room Nights                        | 1,599,300       | 1,554,500       | -2.8% <sup>2</sup>  |
| Direct Expenditures <sup>3</sup>   | \$1,082,785,200 | \$1,006,613,000 | -7.0%               |
| Total Economic Impact <sup>4</sup> | \$1,758,443,200 | \$1,604,541,100 | -8.8% <sup>5</sup>  |

<sup>1</sup>The decrease in the number of visitors was greater than the decrease in room nights or direct expenditures because there were fewer day trippers and people staying with friends and relatives.

<sup>2</sup>Room nights are down despite a slight increase in occupancy due to fewer available units in January-March 2021.

<sup>3</sup>Includes: accommodations, restaurants, entertainment, shopping, transportation, groceries, and “other” expenses.

<sup>4</sup>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.

<sup>5</sup>As of January 2021, the IMPLAN multiplier used to estimate economic impact is 1.594.

# TOURISM SNAPSHOT: KEY METRICS 2019 VS. 2021

| Visitor & Lodging Statistics       | Jan – Mar 2019  | Jan – Mar 2021  | % Change '19-'21    |
|------------------------------------|-----------------|-----------------|---------------------|
| Visitors                           | 1,311,900       | 913,800         | -30.3%              |
| Room Nights                        | 1,848,200       | 1,554,500       | -15.9%              |
| Direct Expenditures <sup>1</sup>   | \$1,251,828,600 | \$1,006,613,000 | -19.6%              |
| Total Economic Impact <sup>2</sup> | \$2,032,969,600 | \$1,604,541,100 | -21.1% <sup>3</sup> |

<sup>1</sup>Includes: accommodations, restaurants, entertainment, shopping, transportation, groceries, and “other” expenses.

<sup>2</sup>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.

<sup>3</sup>As of January 2021, the IMPLAN multiplier used to estimate economic impact is 1.594.



# JANUARY – MARCH LODGING STATISTICS

78.8%

Occupancy

↑ 0.8%

\$181.23

ADR

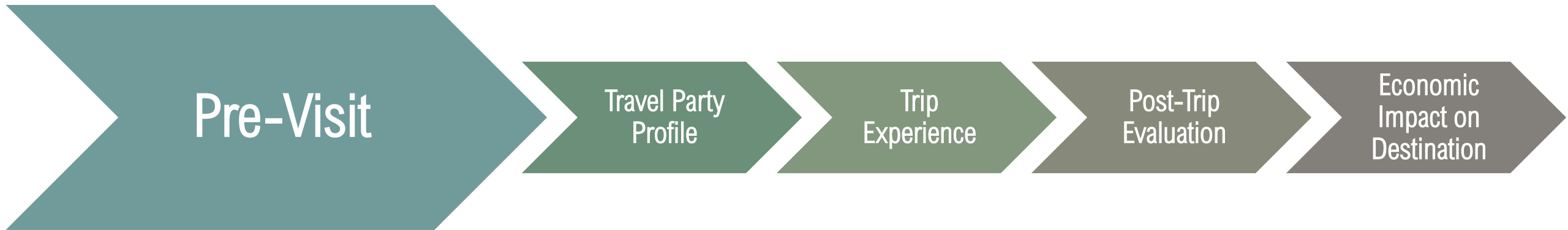
↓ 7.6%

\$142.81

RevPAR

↓ 6.9%

# VISITOR JOURNEY: PRE-VISIT



# TRIP PLANNING

- Nearly **half** of visitors planned their trips to The Beaches of Fort Myers & Sanibel at least **3 months in advance**
- Over **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
- **21%** of visitors considered choosing other destinations when planning their trips

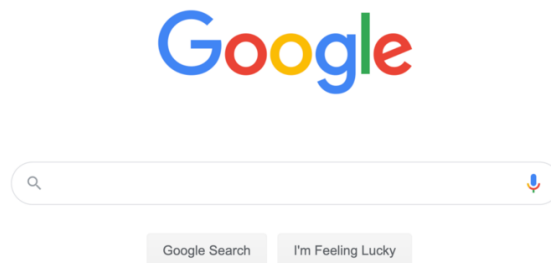


# TRIP PLANNING: WEBSITES/APPS USED

- **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<sup>1</sup>:



**28%** Airline websites/apps



**27%** Search engines



**27%** Airbnb, VRBO,  
HomeAway



**21%** Vacation Rental  
websites/apps

<sup>1</sup>Multiple responses permitted.

# TOP TRIP INFLUENCERS

- Visitors were heavily **influenced** by the following when choosing where to vacation<sup>1</sup>:



95% Warm weather



91% Peaceful/relaxing

<sup>1</sup>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<sup>1</sup>:



46% Vacation



45% Beach



43% Relax & unwind



20% Visit friends & relatives

<sup>1</sup>Three responses permitted.

# PROMOTIONS

- **35%** of visitors **recalled promotions** in the past 6 months for The Beaches of Fort Myers & Sanibel
- Top sources of recall include<sup>1</sup>:



**34%** Internet



**31%** Social media

<sup>1</sup>Multiple responses permitted.

# BOOKING

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



**46%** Directly with hotel



**15%** VRBO,  
HomeAway



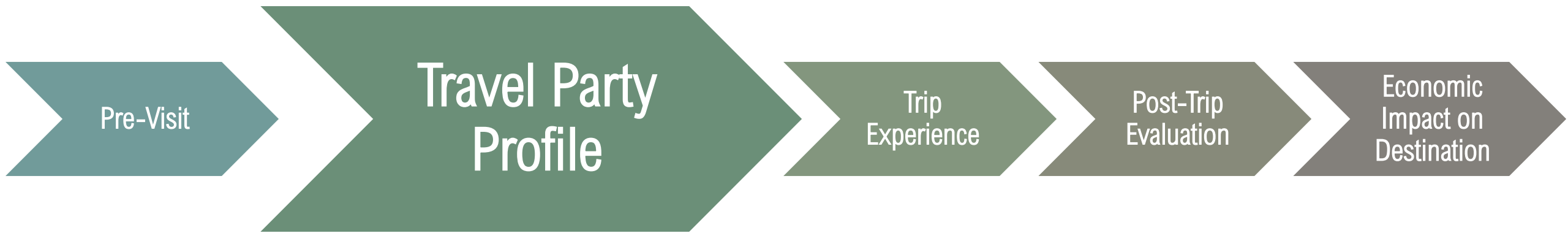
**15%** Airbnb

# TRANSPORTATION



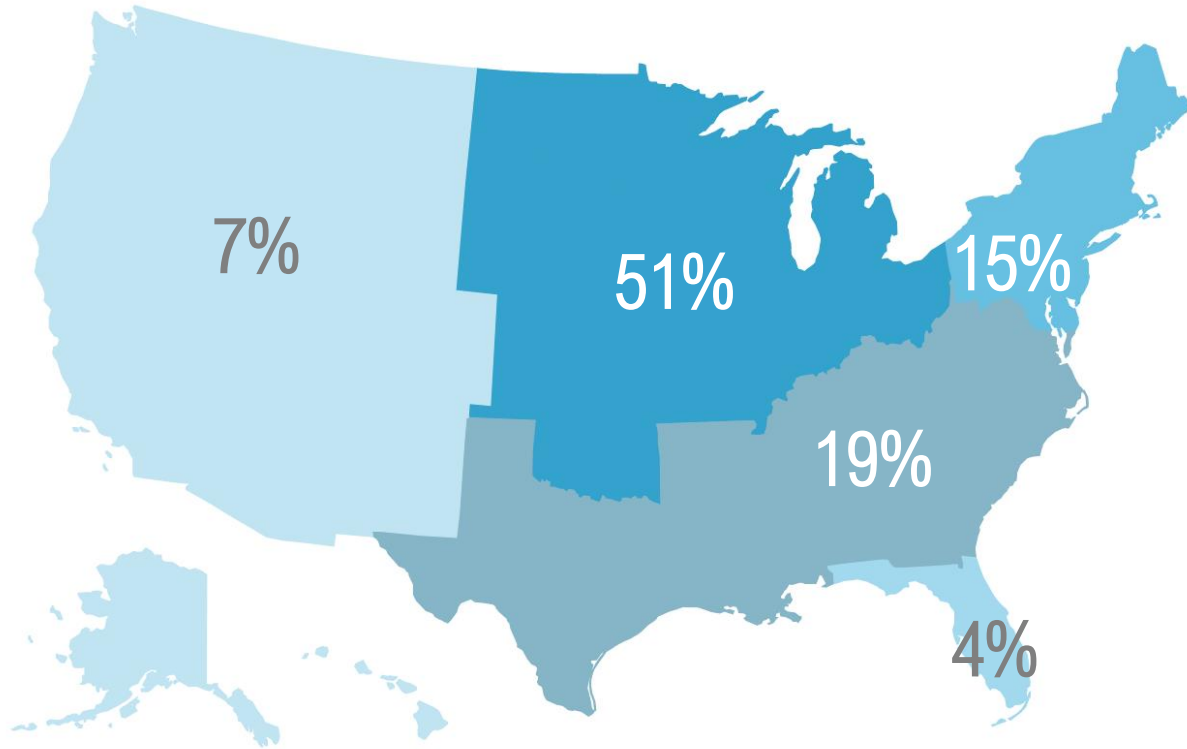
- 74% of visitors flew to The Beaches of Fort Myers & Sanibel
- 56% of all visitors traveled to Ft. Myers via RSW

# VISITOR JOURNEY: TRAVEL PARTY PROFILE

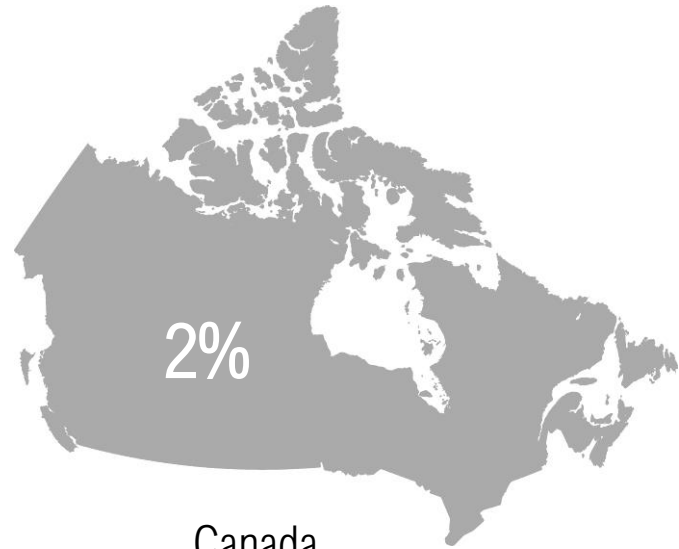




# ORIGIN



US = 96%



Canada

# TOP ORIGIN MARKETS



8% Minneapolis-  
St. Paul



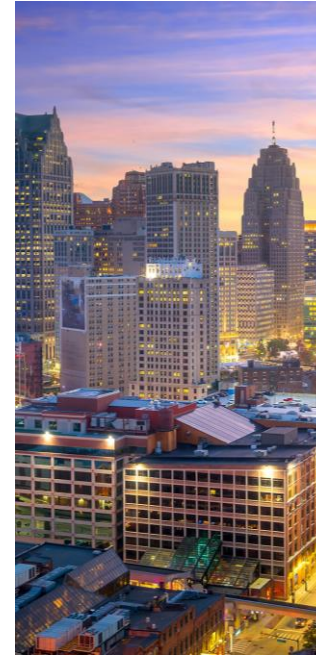
8% Chicago



6% New York City



6% Columbus



5% Detroit



5% Indianapolis



5% Cleveland-  
Akron

# TRAVEL PARTY SIZE AND COMPOSITION

- Visitors traveled in a party composed of **3.6 people**<sup>1</sup>
- **35%** traveled with **children** under the age of 18
- **41%** traveled as a **family**, while **38%** of visitors traveled as a **couple**



<sup>1</sup>Source: Visitor Tracking Survey, includes all types of visitors



# DEMOGRAPHIC PROFILE



## Jan – Mar Visitors:

- Average age of **50 years old**
- Median household income of **\$96,900**
- Married (**77%**)
- College educated (**71%**)
- Caucasian/white (**80%**)
- Slightly more likely to be male (**52%**)

# Visitor Journey: Trip Experience





# ACCOMMODATIONS



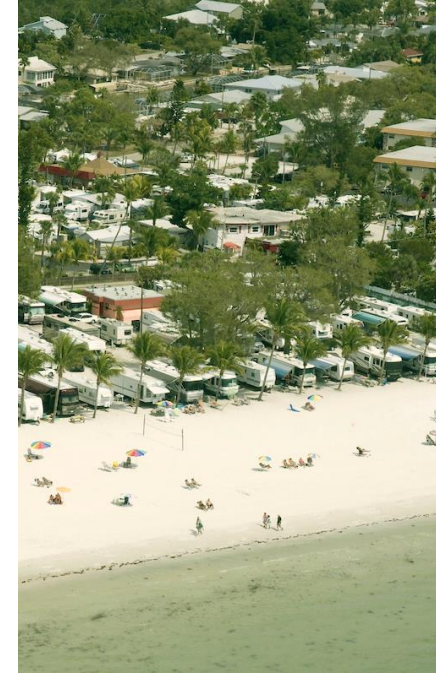
44% Condo/Vacation Rental



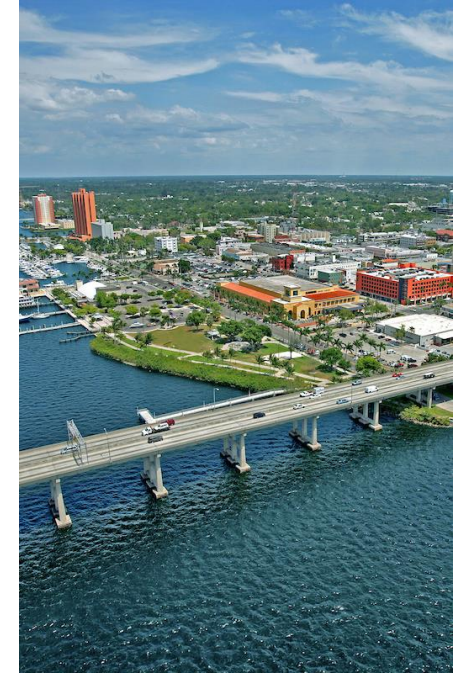
32% Hotel/Motel/Resort/B&B



20% Non-paid Accommodations



2% RV Park/Campground



2% Day trippers



# LENGTH OF STAY & NUMBER OF TIMES IN DESTINATION

- Visitors<sup>1</sup> spent **8.9 nights** in The Beaches of Fort Myers & Sanibel
- **27%** were **first time** visitors
- **20%** have visited **more than 10 times**



<sup>1</sup>Source: Visitor Tracking Survey, includes all types of visitors

# VISITOR ACTIVITIES

- Top **visitor activities** include<sup>1</sup>:



**71%** Beaches



**64%** Relax & unwind

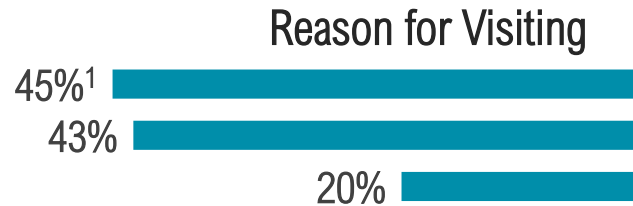


**52%** Dining

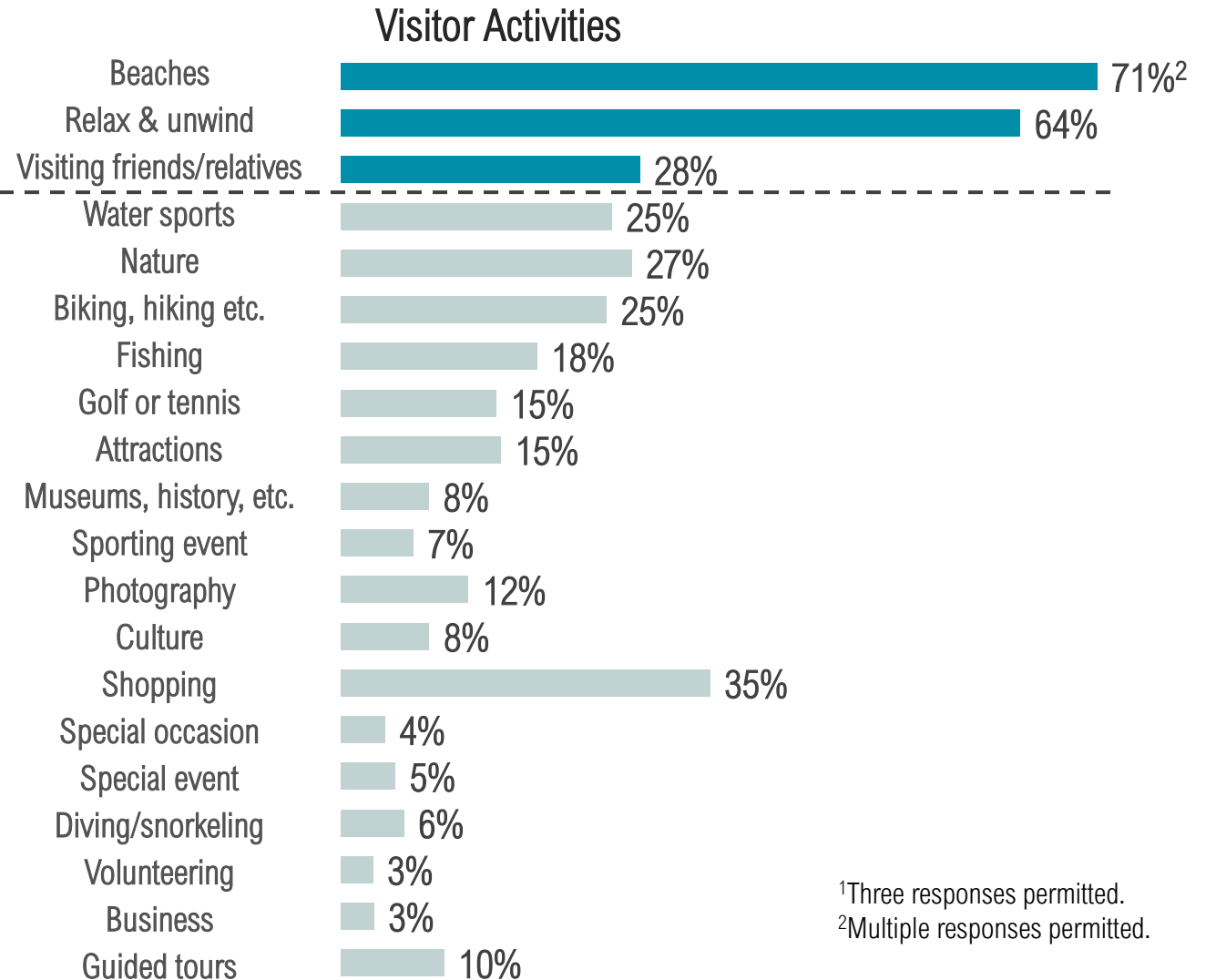
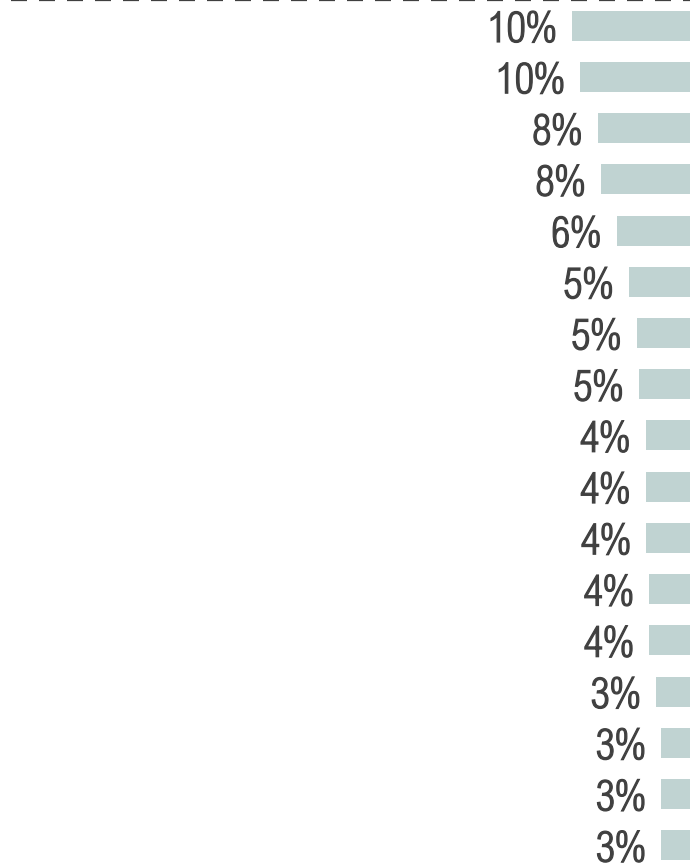
<sup>1</sup>Multiple responses permitted.

# REASON FOR VISITING VS. VISITOR ACTIVITIES

## Key Reasons for Visiting



## Trip Enhancements



<sup>1</sup>Three responses permitted.  
<sup>2</sup>Multiple responses permitted.



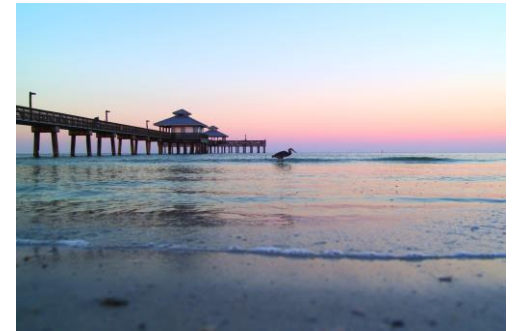
# TOP ATTRACTIONS VISITED<sup>1</sup>



71% Beaches



32% Sanibel Lighthouse



29% Fort Myers Beach Pier

<sup>1</sup>Multiple responses permitted.



# TOP COMMUNITIES STAYED



28% Sanibel Island



22% Fort Myers Beach



17% Fort Myers



15% Cape Coral

# VISITOR JOURNEY: POST-TRIP EVALUATION



# SATISFACTION



- 95% of visitors are likely to recommend The Beaches of Fort Myers & Sanibel
- 91% of visitors are likely to return
- 58% of visitors are likely to return next year

# SATISFACTION



- 96% of visitors were **satisfied or very satisfied with their overall visit** to The Beaches of Fort Myers & Sanibel
- 94% of visitors were **satisfied or very satisfied with customer service** on their visit
- 45% of visitors said paid accommodations **exceeded their expectations** (97% met or exceeded expectations)



# TOP ATTRIBUTE RATINGS

→ Visitors gave the highest ratings to the following **destination attributes**<sup>1</sup>:



95% Warm weather



95% A safe destination



95% Peaceful/relaxing

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



# VISITOR CONCERNS

- **Over 2 in 5** visitors were concerned about **traffic** in The Beaches of Fort Myers & Sanibel
- **Over 1 in 5** were concerned about **high prices** and **Red Tide**
- **19%** of visitors had **no concerns** about the destination





# AREA DESCRIPTIONS

## Wonderful Place to Visit



*"A great place to visit. Clean sunny beaches and relaxed. Limited commercial areas, all local one-of-a-kind restaurants and shops - no chains."*

## Beautiful Beaches



*"Some of the most beautiful beaches in the world. Beautiful western sky sunsets, great happy hours in restaurants."*

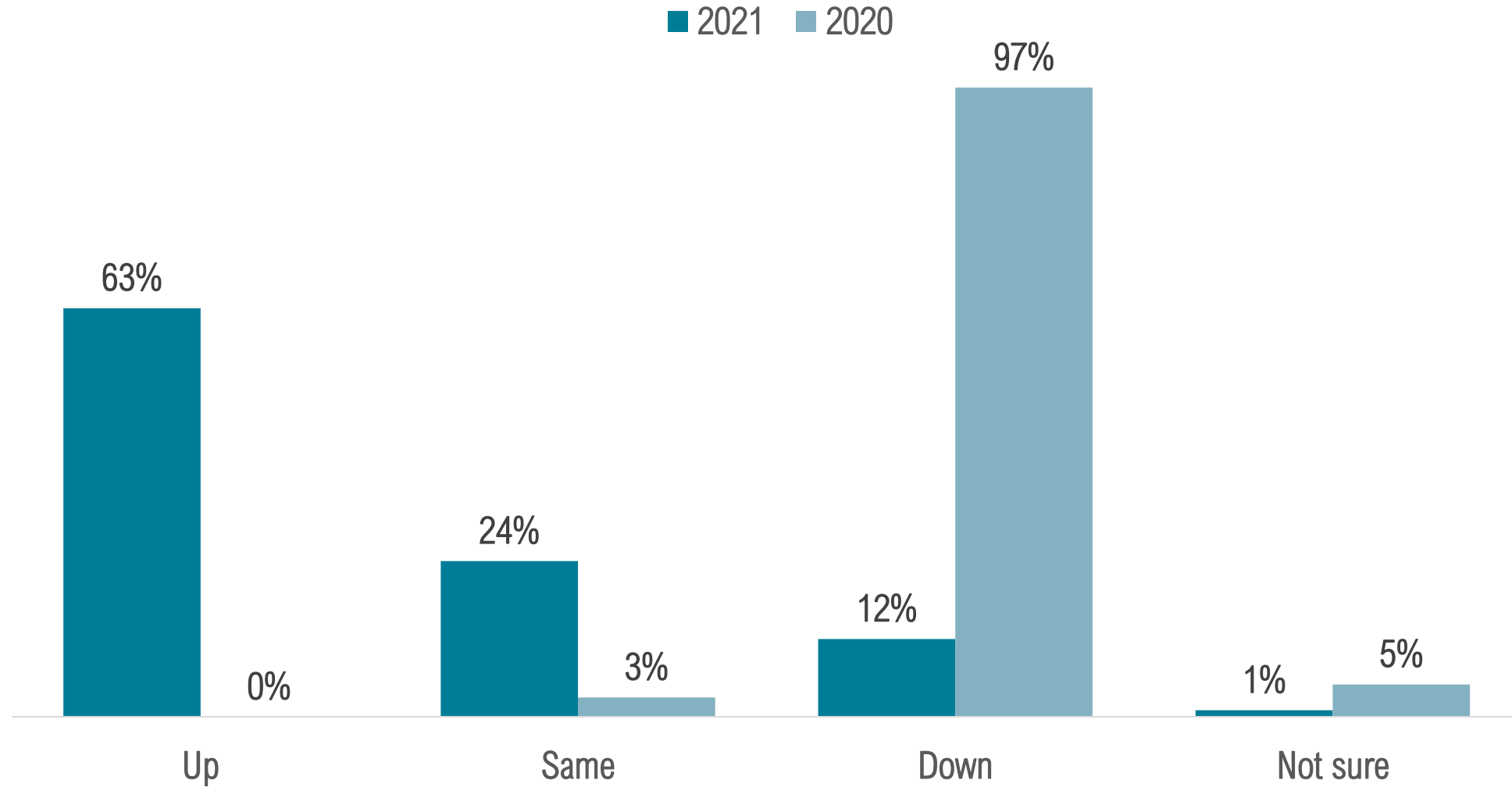


## Family Friendly

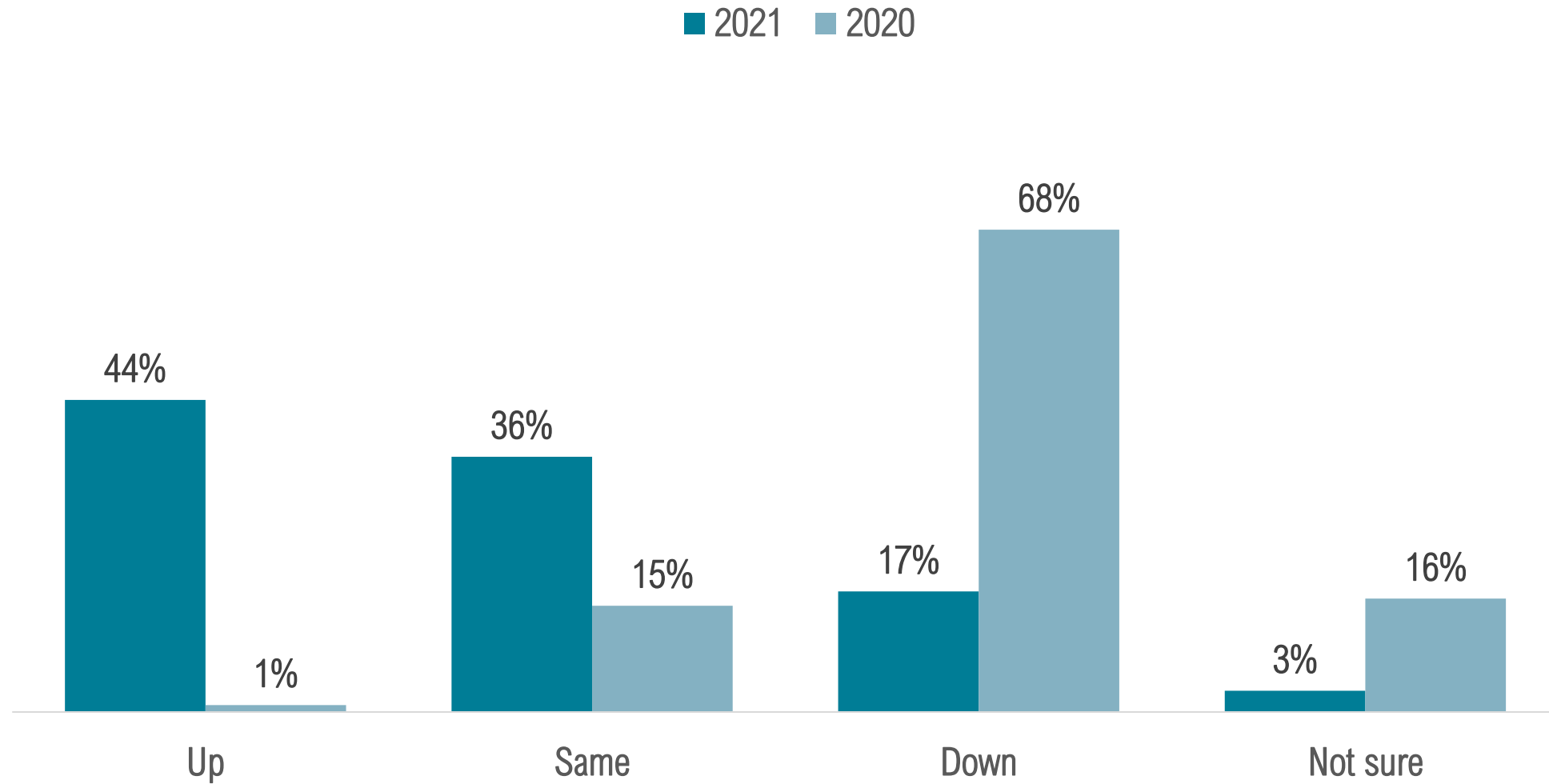
*"Beautiful place to vacation in with your family. A lot to see and do, good pricing, beautiful shoreline."*



# OCCUPANCY BAROMETER: APRIL – JUNE RESERVATIONS



# OCCUPANCY BAROMETER: JULY – SEPTEMBER RESERVATIONS





# Detailed Findings



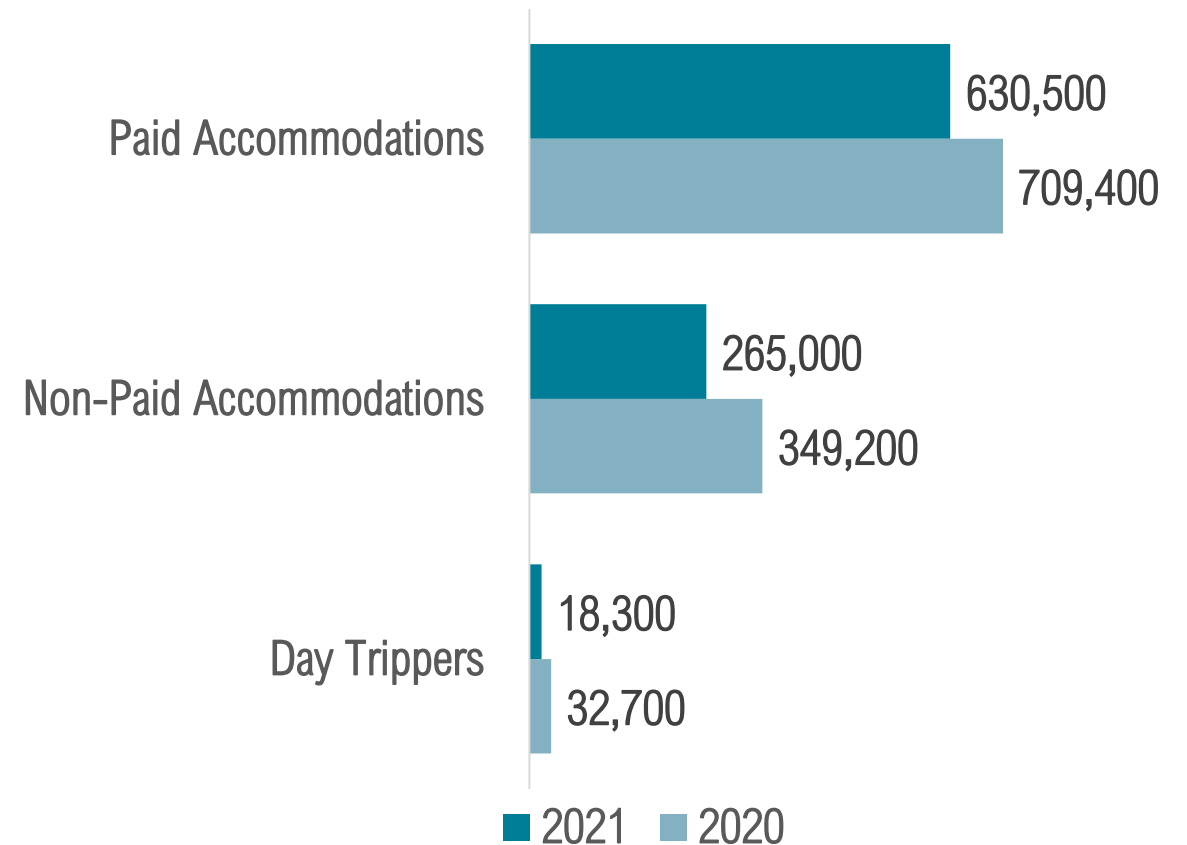


# VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION



# NUMBER OF VISITORS

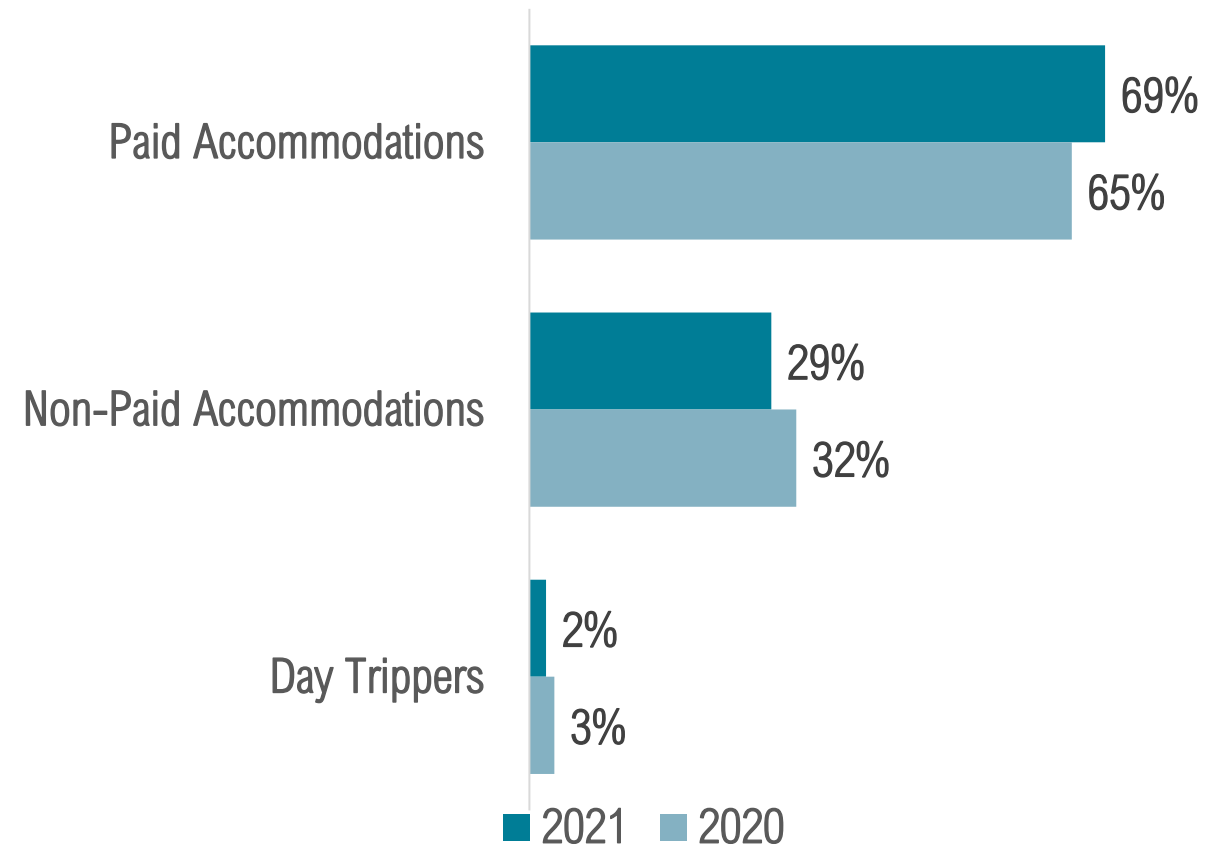
There were **913,800<sup>1</sup>** visitors to The Beaches of Fort Myers & Sanibel in Jan – Mar 2021 (-16.3% from 2020).



<sup>1</sup>Sources: Visitor Tracking Study & Occupancy Survey

# VISITOR TYPE

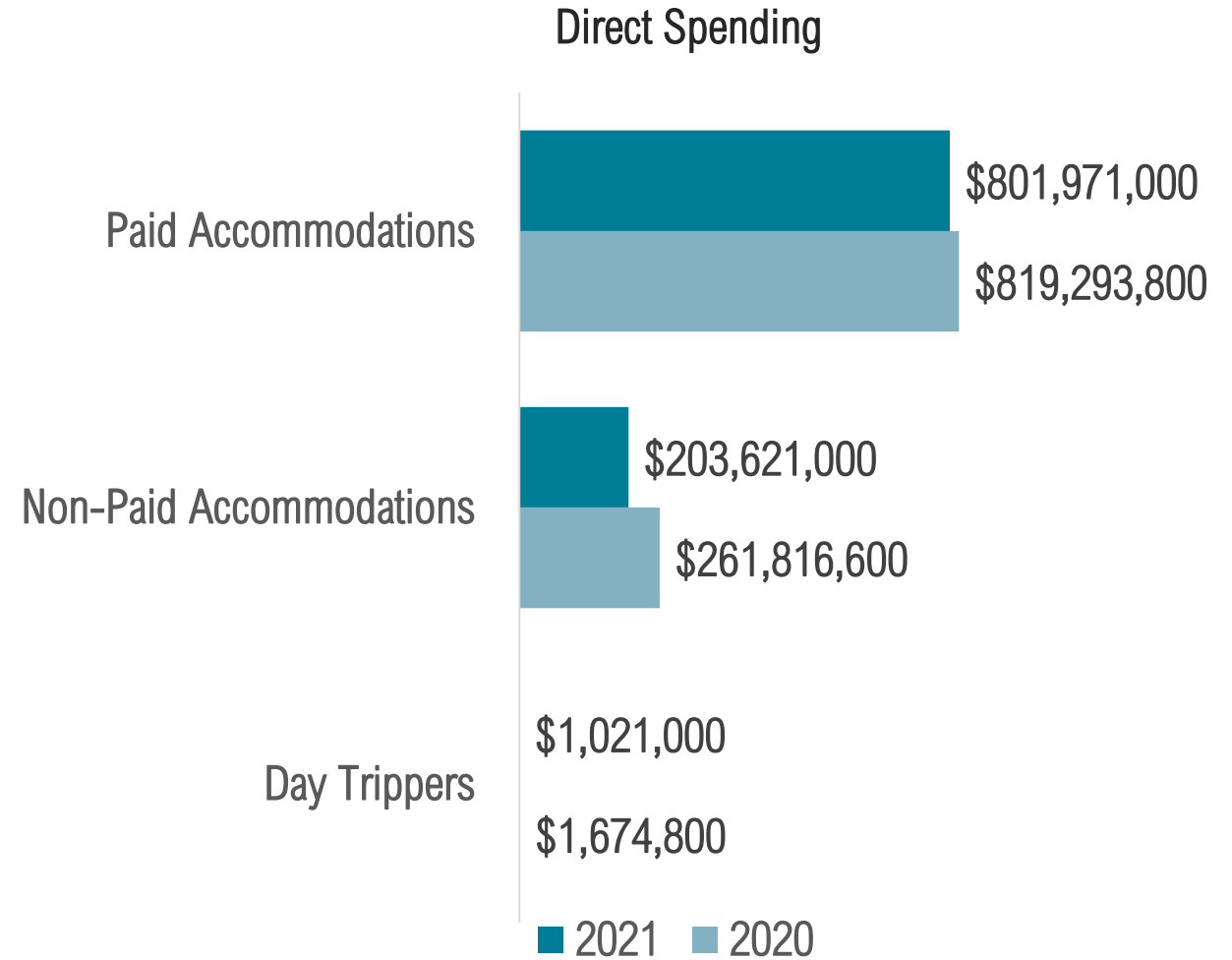
Visitors staying in paid accommodations accounted for nearly **7 in 10** visitors.



# VISITOR EXPENDITURES BY VISITOR TYPE

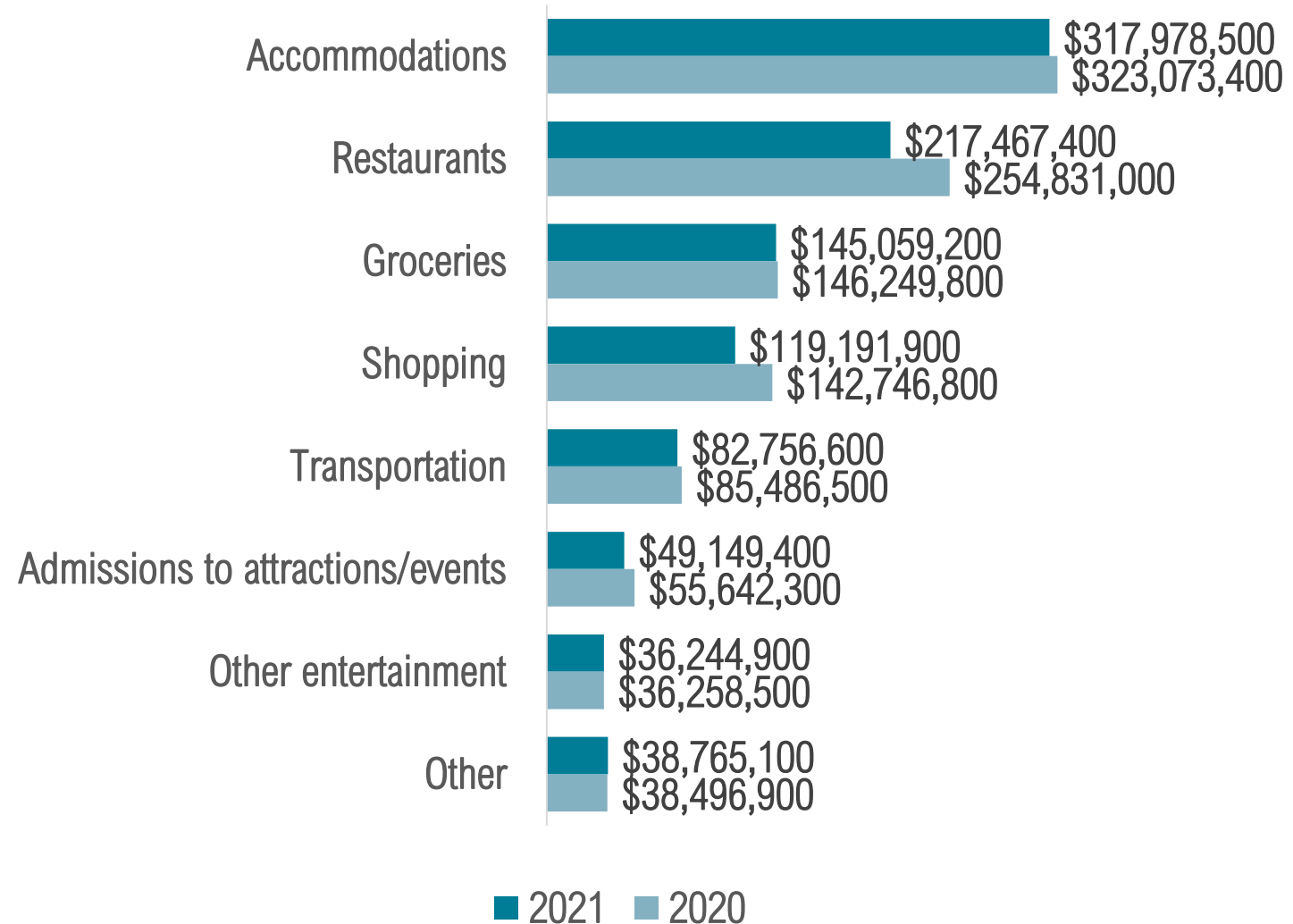


Jan – Mar visitors spent **\$1,006,613,000** in The Beaches of Fort Myers & Sanibel, resulting in a total economic impact of **\$1,604,541,100**, down 8.8% from 2020.



# VISITOR EXPENDITURES BY SPENDING CATEGORY

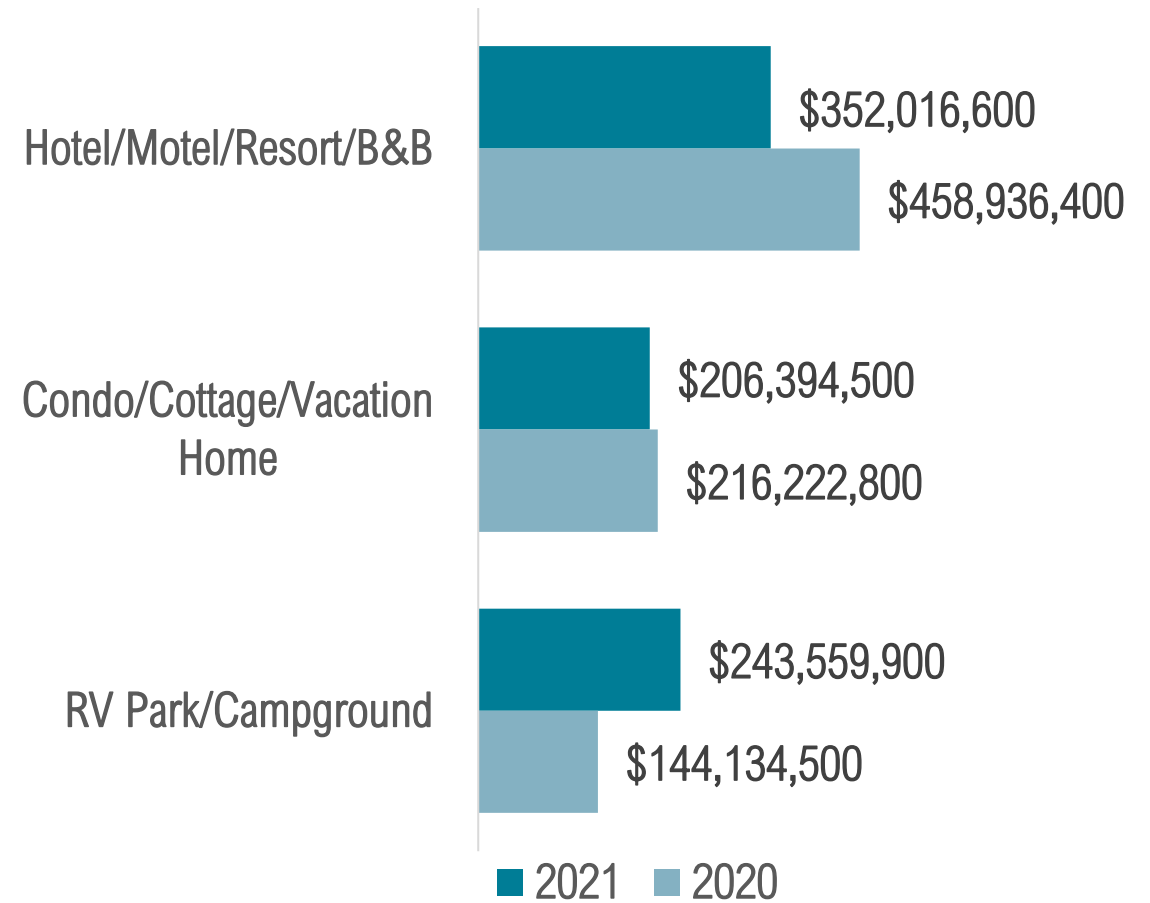
Of the **\$1,006,613,000** visitors spent in The Beaches of Fort Myers & Sanibel, 32% was spent on **accommodations** and 22% was spent on **restaurants**, accounting for **54% of all visitor spending**.





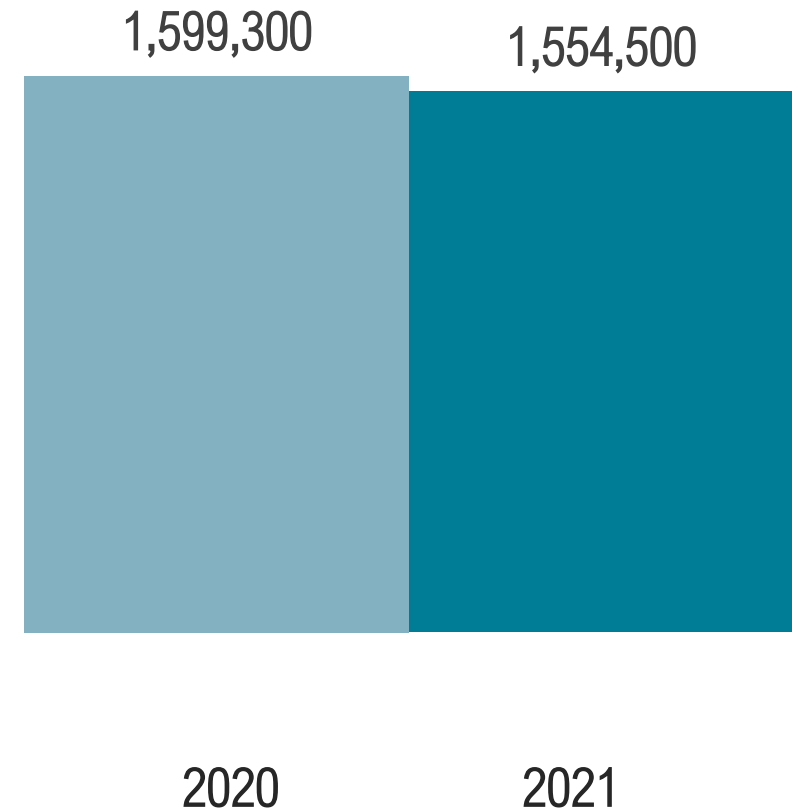
# VISITOR EXPENDITURES BY LODGING TYPE

Jan – Mar visitors staying in paid accommodations spent **\$801,971,000** in The Beaches of Fort Myers & Sanibel.



# ROOM NIGHTS GENERATED

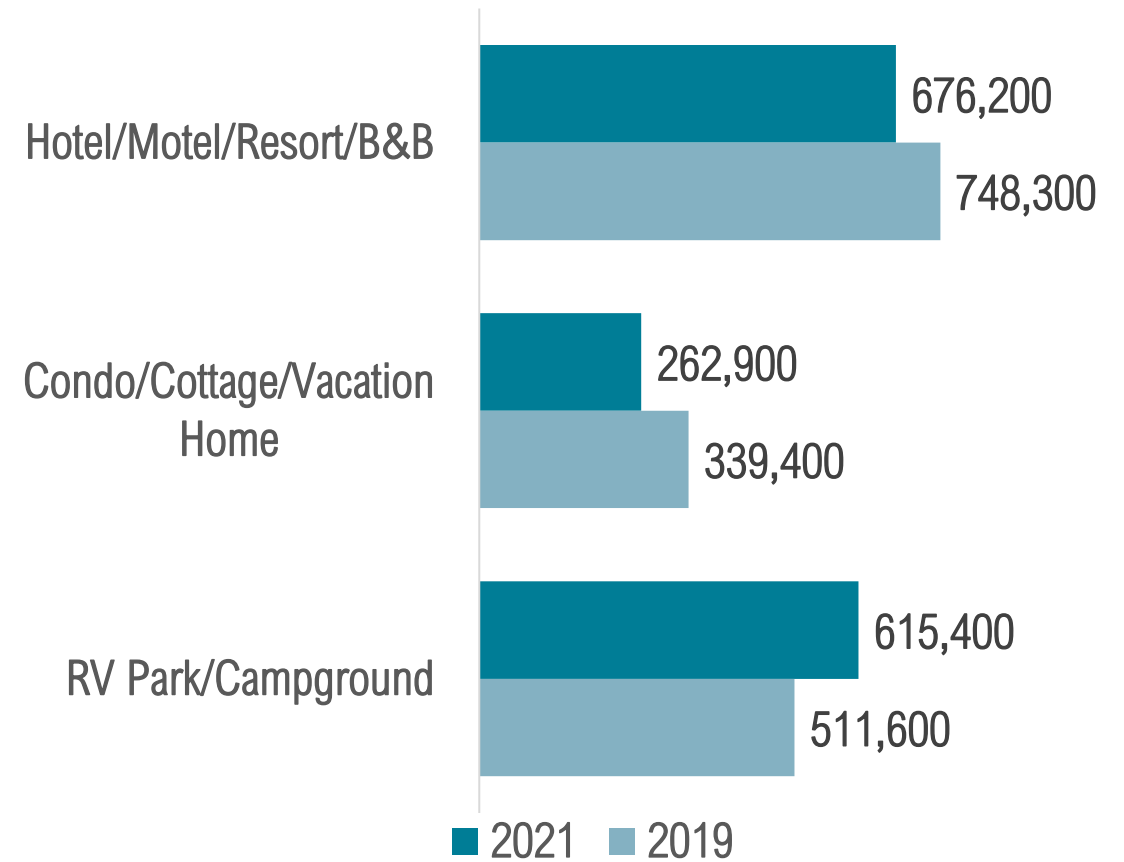
Jan – Mar visitors spent **1,554,500** nights in The Beaches of Fort Myers & Sanibel hotels, resorts, condos, rental houses, etc. (-2.8% from 2020).



<sup>1</sup>Source: Occupancy Survey

# ROOM NIGHTS GENERATED

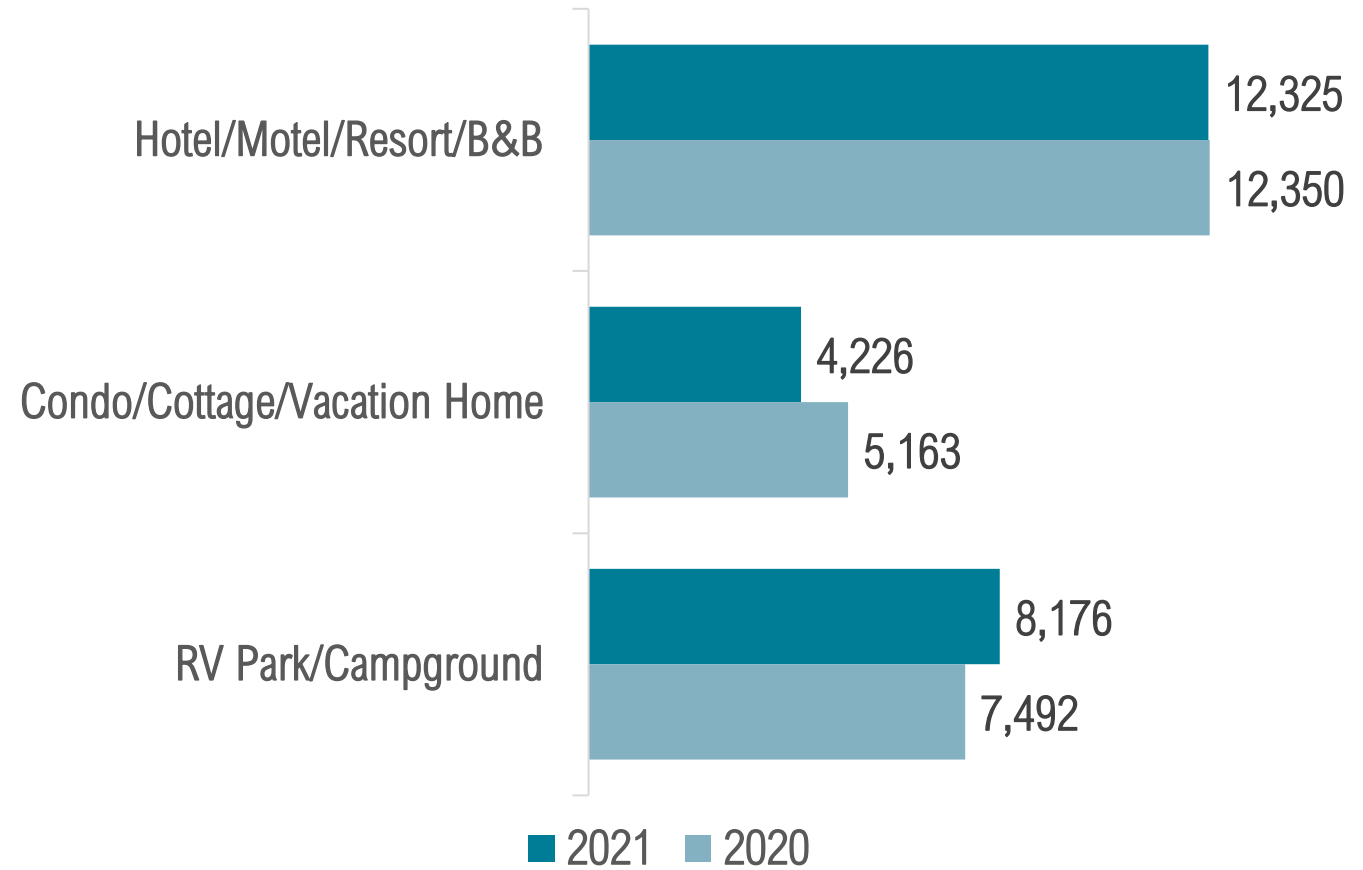
Motels, hotels, etc. accounted for over **2 in 5** nights in The Beaches of Fort Myers & Sanibel, while vacation rentals accounted for nearly **1 in 6** nights visitors spent in the area.



<sup>1</sup>Source: Occupancy Survey

# AVAILABLE UNITS

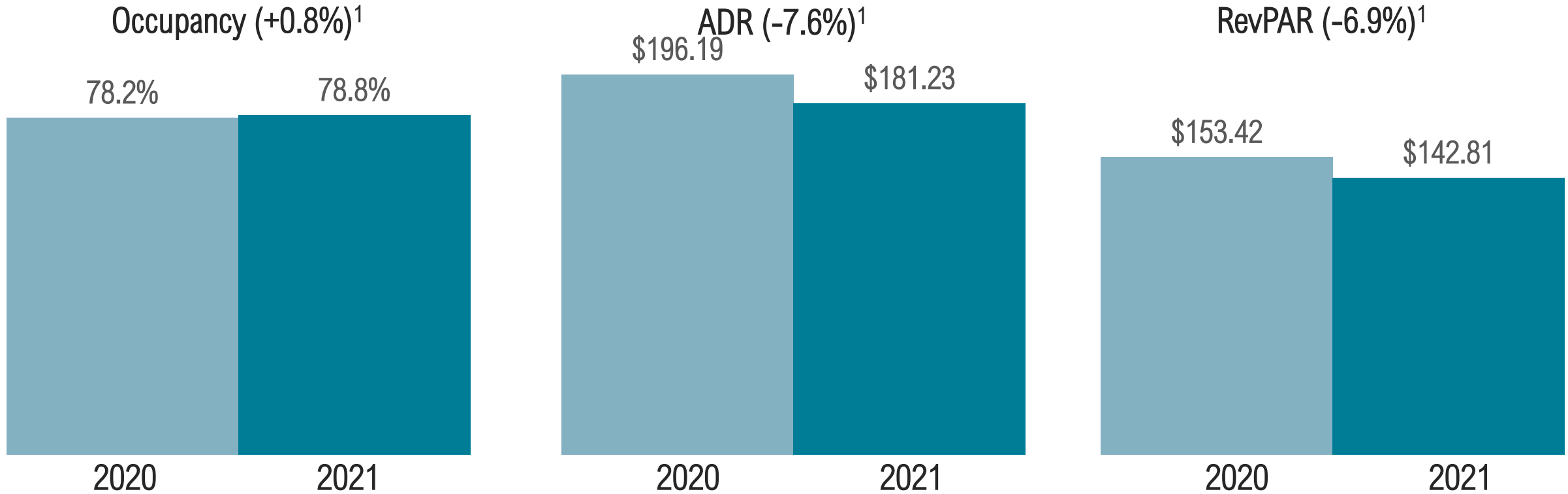
There were **24,727<sup>1</sup>** available units in Jan – Mar, 2021 vs. 25,005 in 2020 (-1.1%). Over half of the units were hotels, motels, etc.



<sup>1</sup>Source: Occupancy Survey



# OCCUPANCY, ADR AND REVPAR

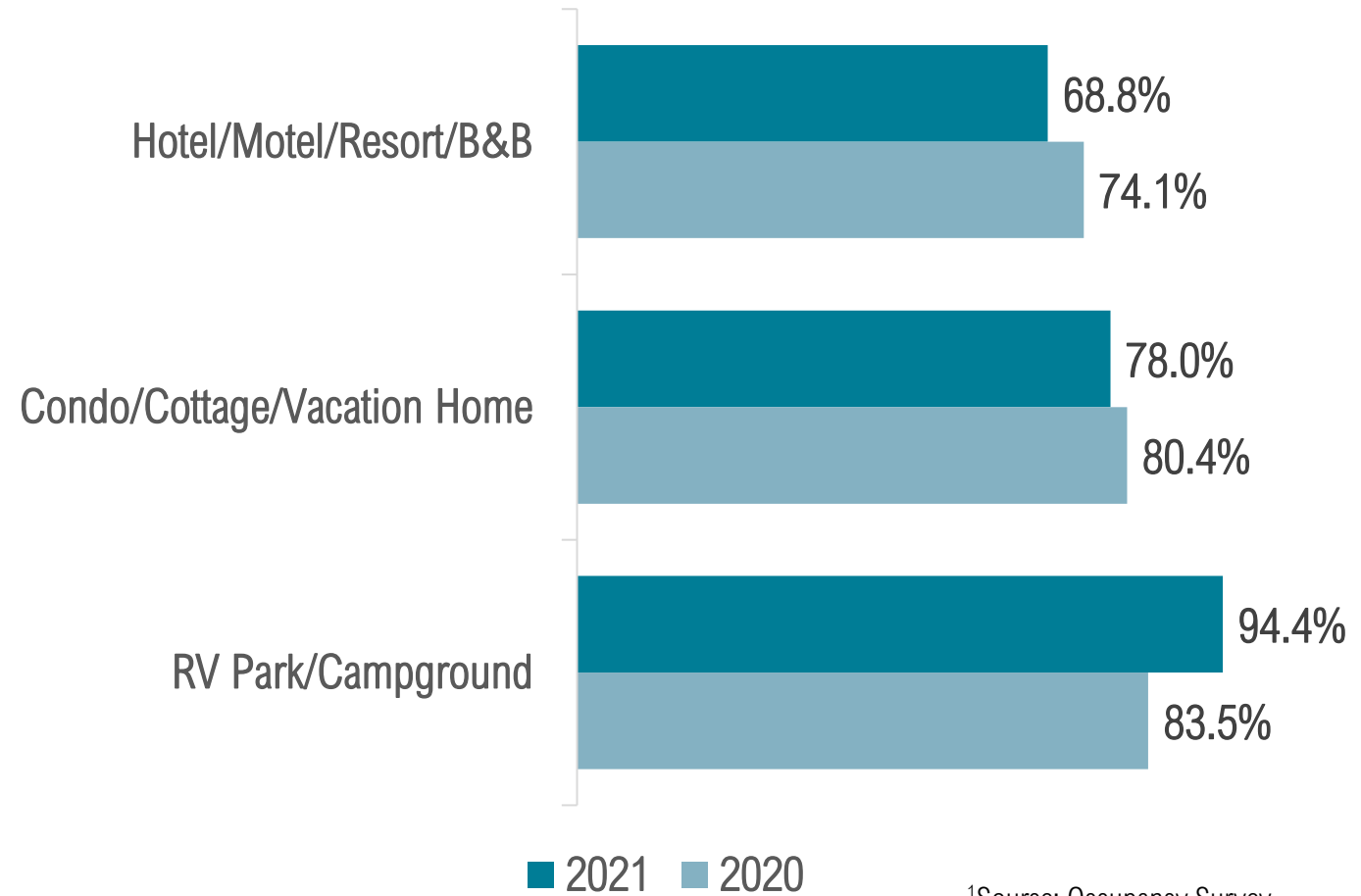


<sup>1</sup>Source: Occupancy Survey

# OCCUPANCY



Average occupancy in Jan – Mar was **78.8%<sup>1</sup>** (78.2% in 2020).

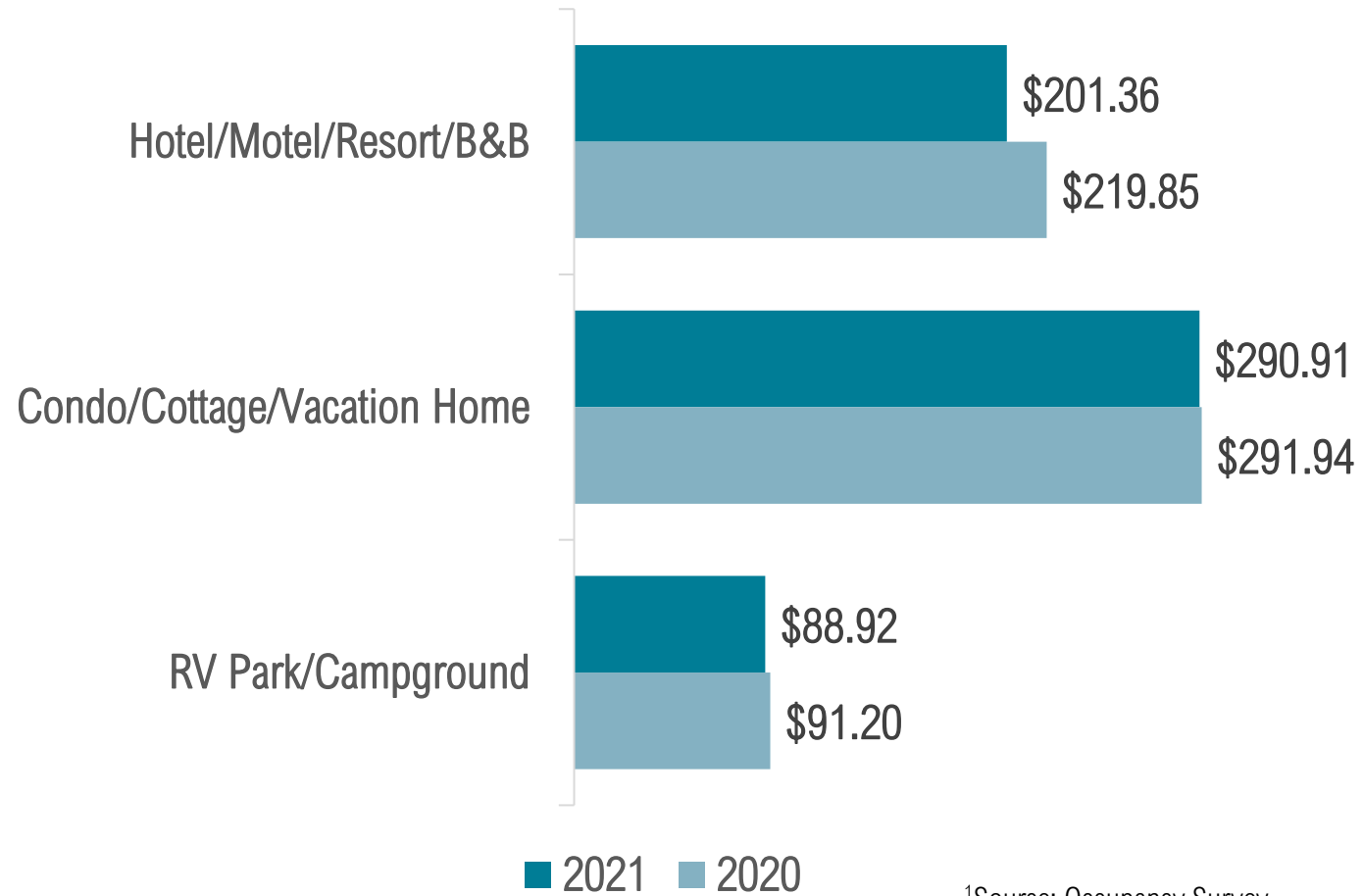


<sup>1</sup>Source: Occupancy Survey

# ADR



ADR in Jan – Mar was **\$181.23<sup>1</sup>** (\$196.19 in 2020).

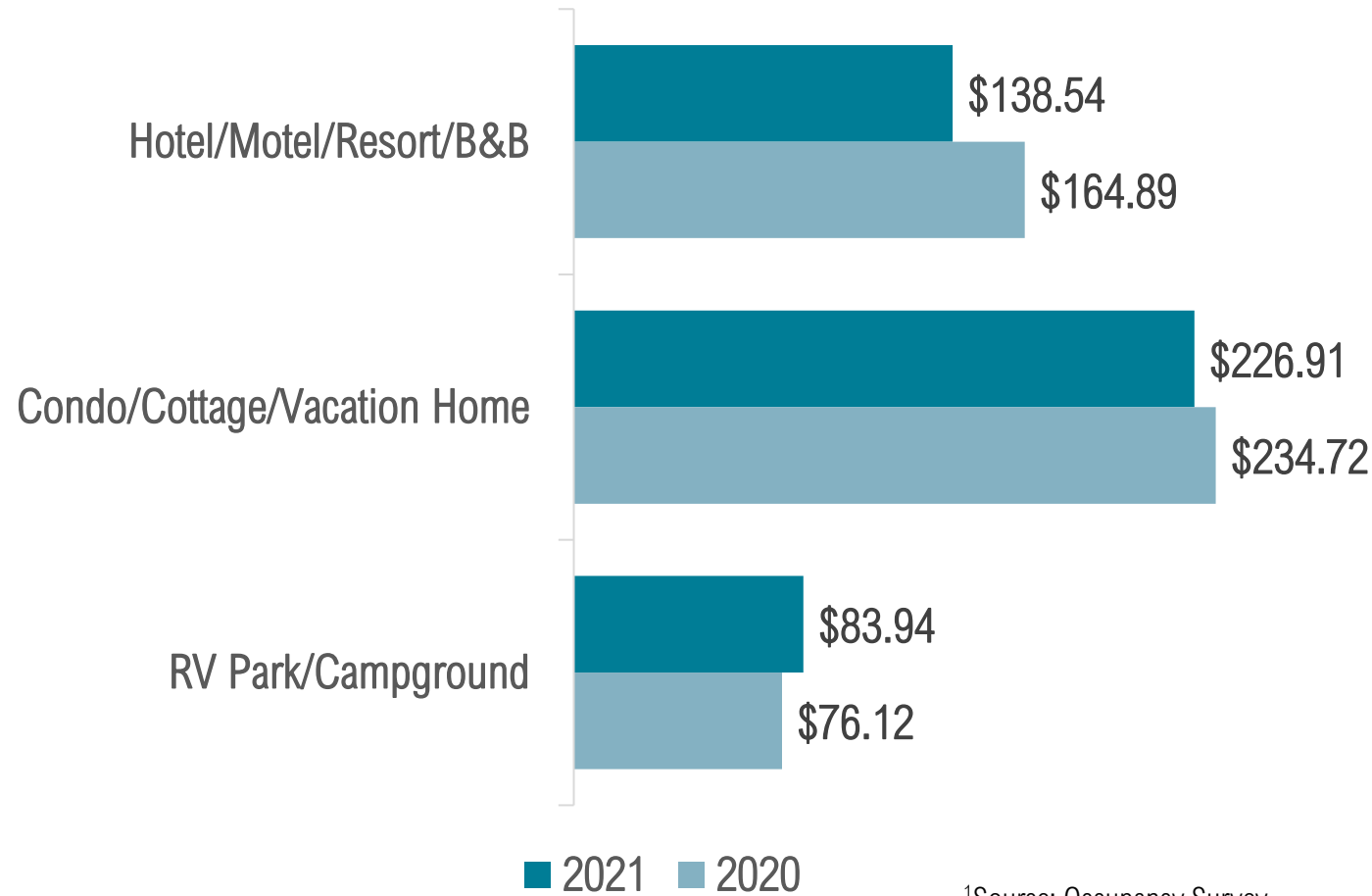


<sup>1</sup>Source: Occupancy Survey

# REVPAR



Average RevPAR in Jan – Mar was **\$142.81** (\$153.42 in 2020).

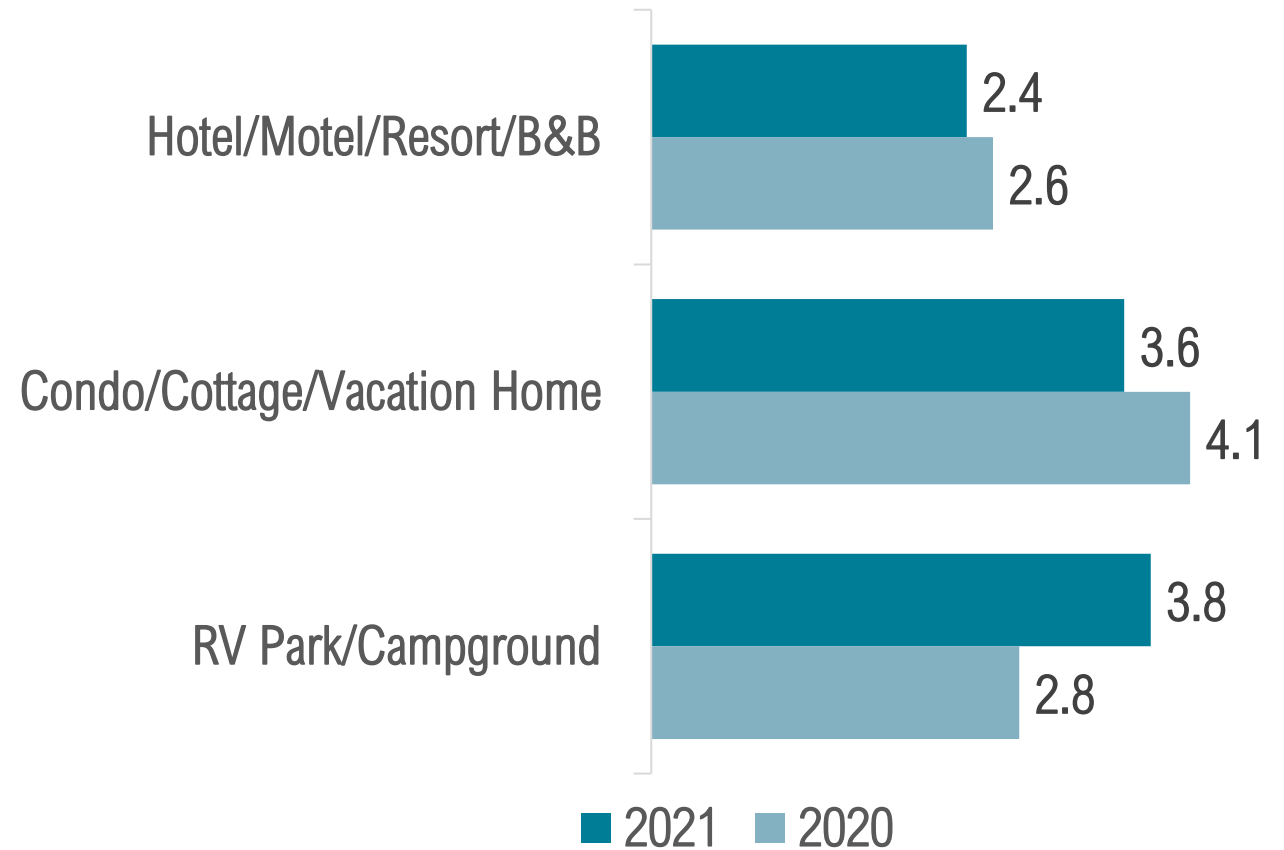


<sup>1</sup>Source: Occupancy Survey



# TRAVEL PARTY SIZE

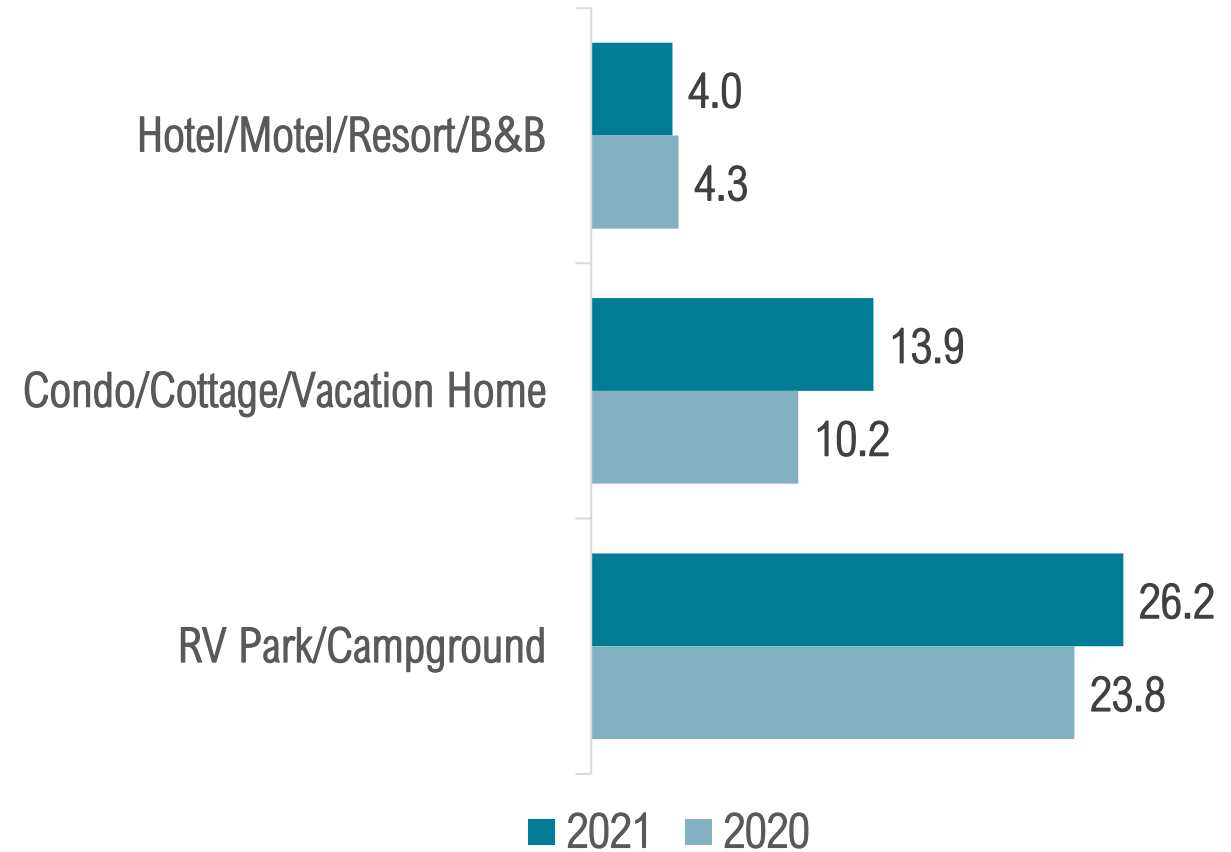
For visitors in paid accommodations, average travel party size in Jan – Mar was **2.8 people**<sup>1</sup> (2.9 people in 2020).



<sup>1</sup>Source: Occupancy Survey

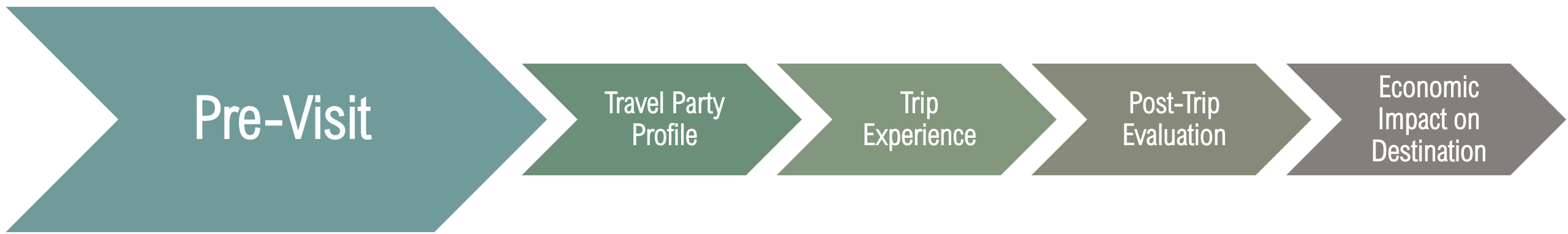
# LENGTH OF STAY

For visitors in paid accommodations, average length of stay in Jan – Mar was **7.7 nights<sup>1</sup>** (7.4 nights in 2020).



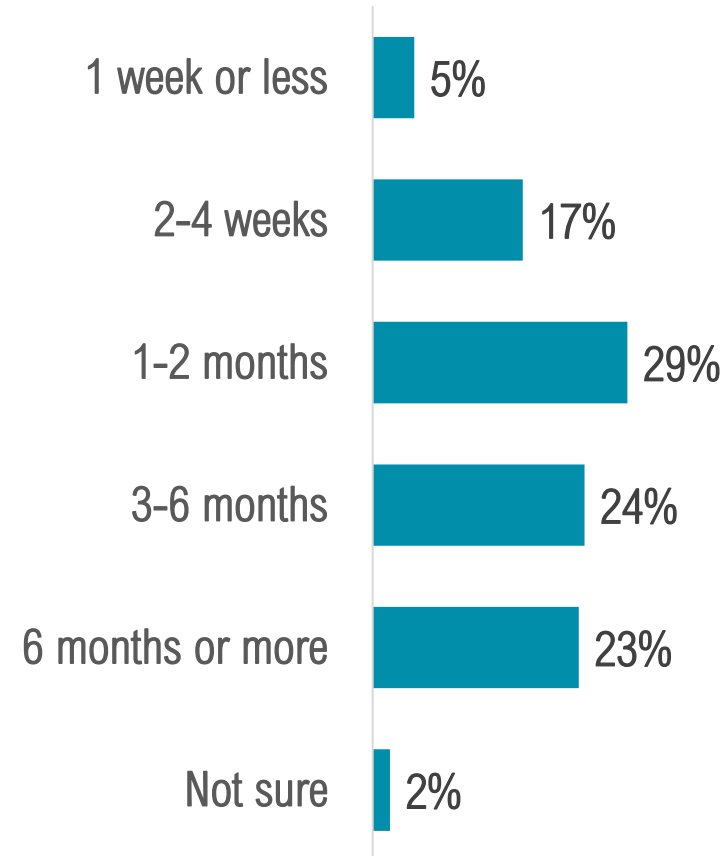
<sup>1</sup>Source: Occupancy Survey

# Visitor Journey: Pre-Visit



# TRIP PLANNING CYCLE

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



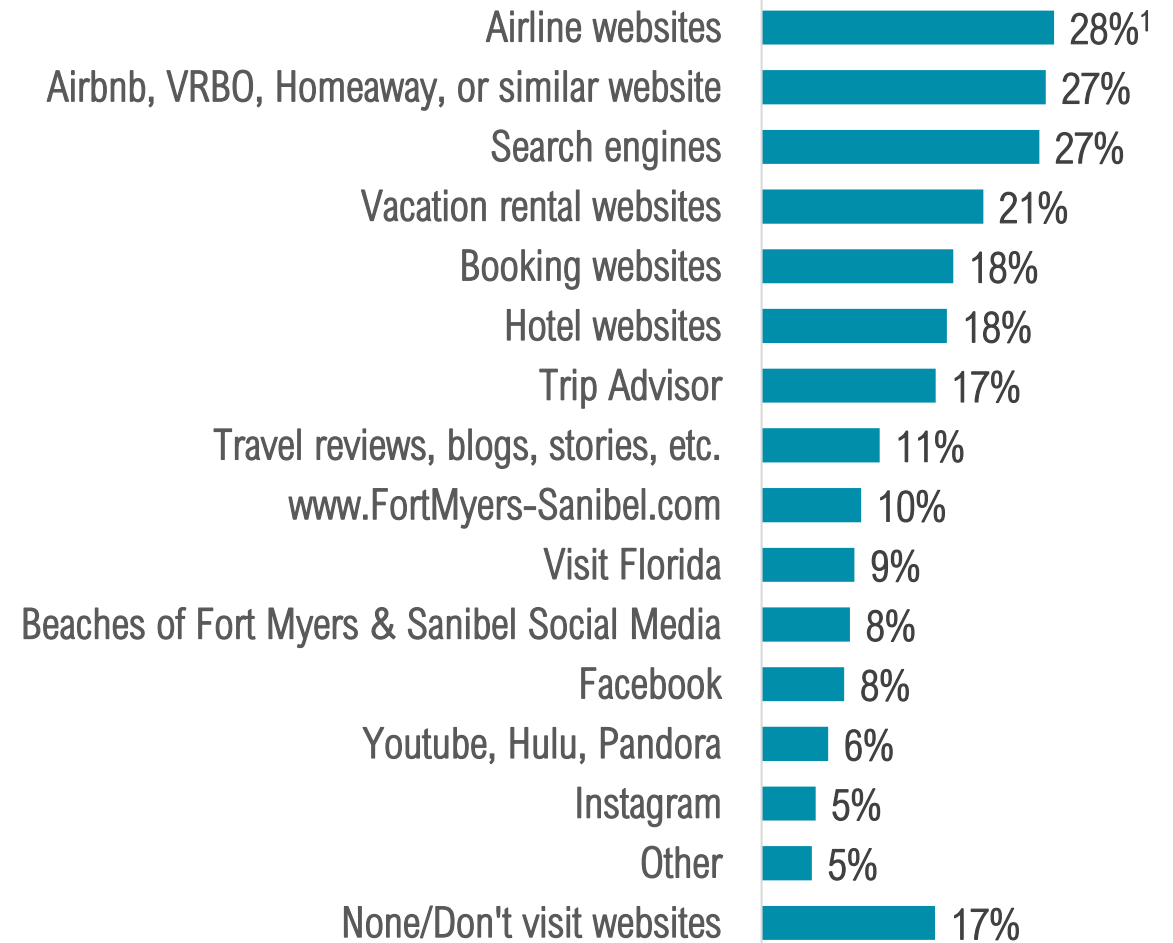


# TRIP PLANNING: WEBSITES/APPS USED

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 **airline sites/apps, vacation rental sites/apps,** and **search engines** to plan their trips.

2021 visitors were more likely to use **Beaches of Fort Myers and Sanibel Social Media** and **the website** to plan their trips.



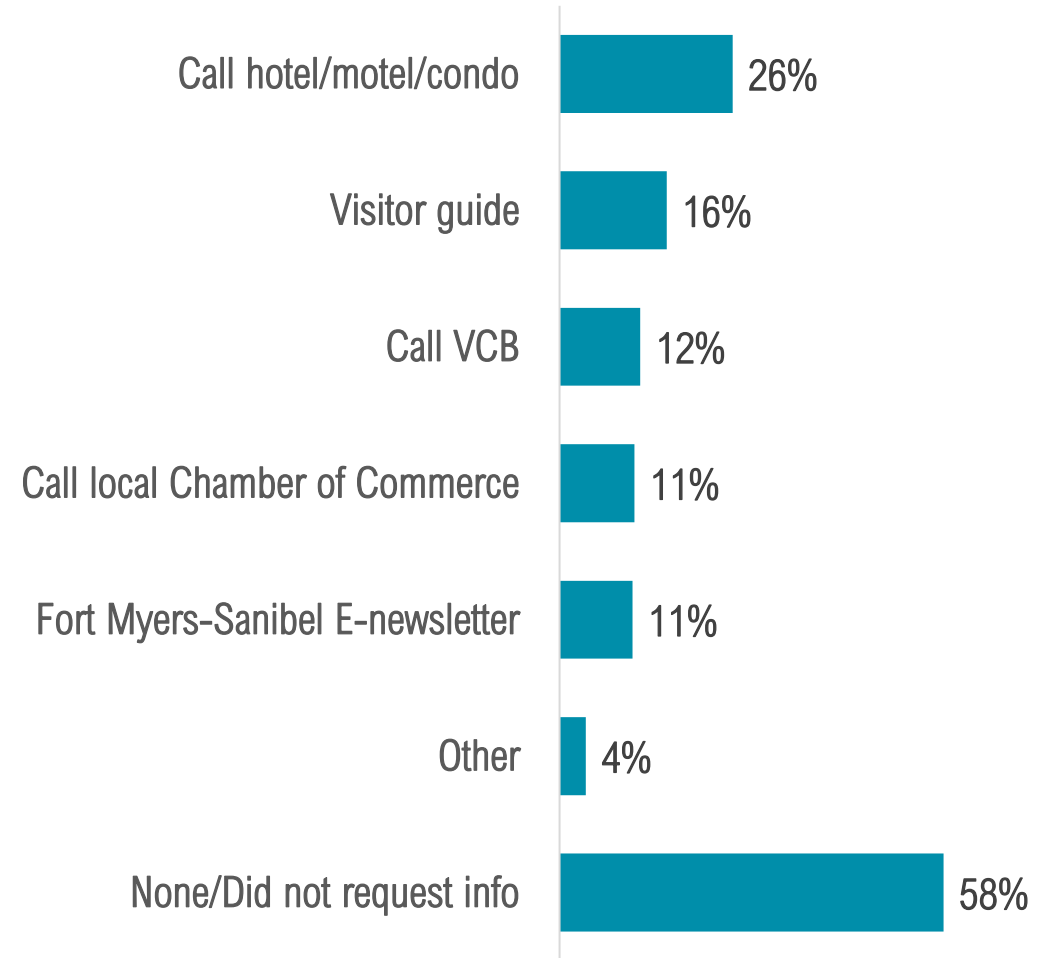
<sup>1</sup>Multiple responses permitted.

# TRIP PLANNING: INFORMATION REQUESTS

Over 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 in Jan-Mar 2021

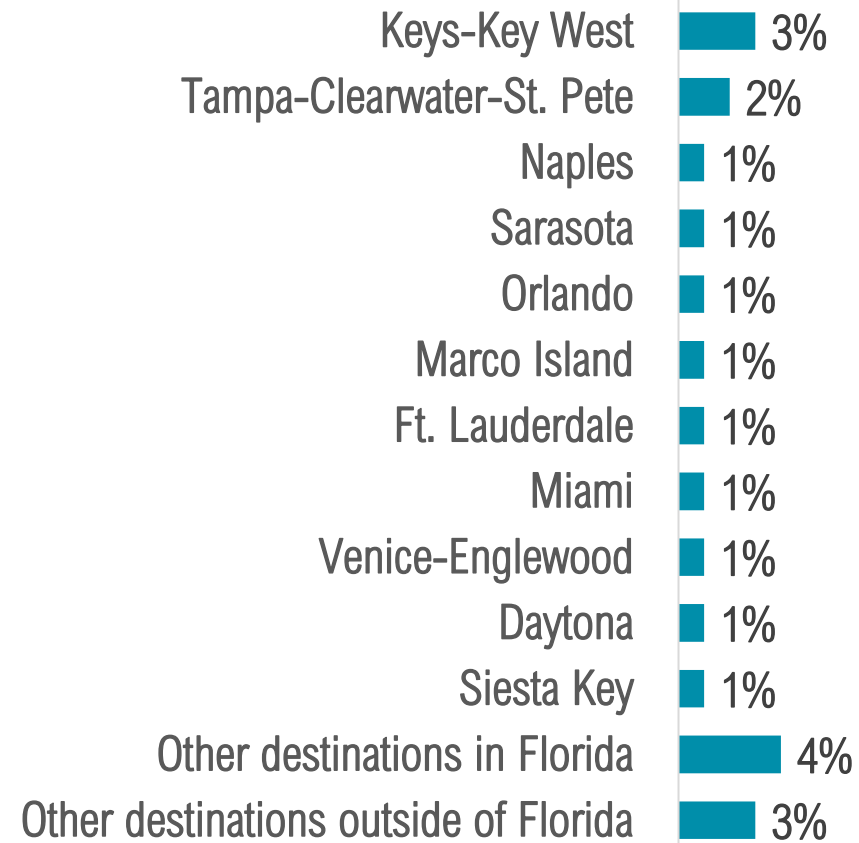


<sup>1</sup>Multiple responses permitted.

# TRIP PLANNING: OTHER DESTINATIONS CONSIDERED

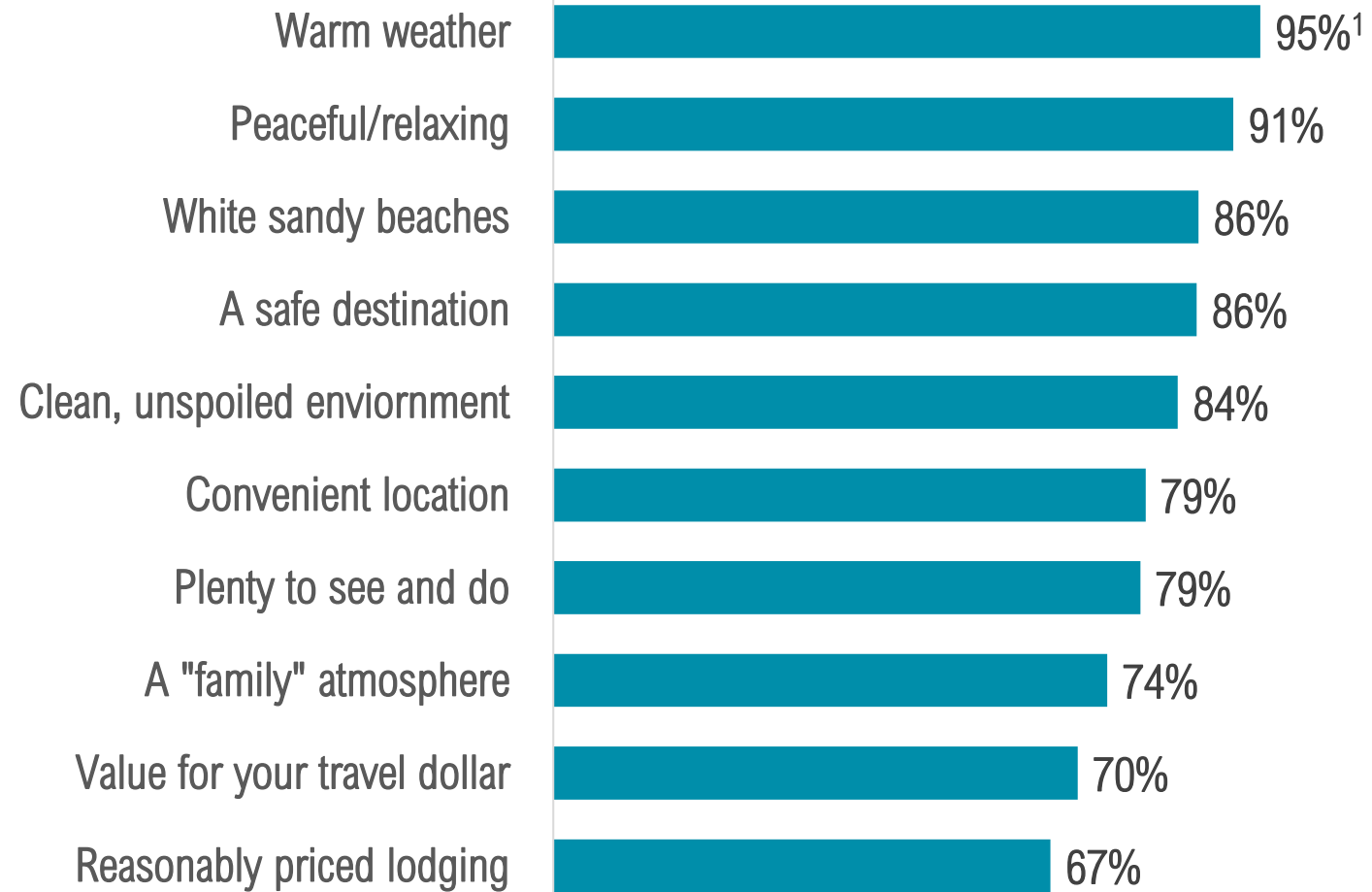
21% of visitors considered **choosing other destinations** when planning their trips.

Most alternative destinations were in **Florida**.



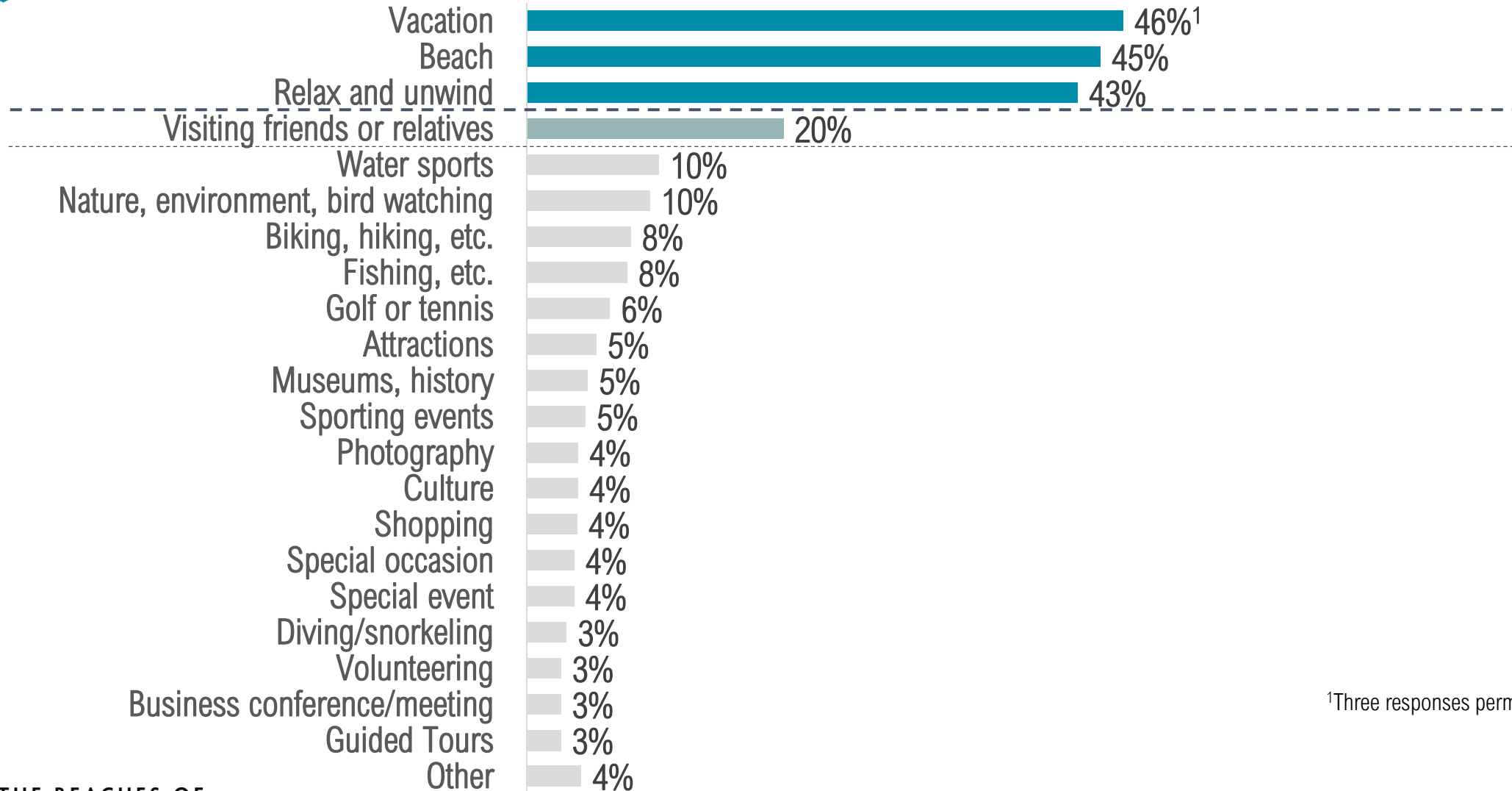
# TRIP INFLUENCERS

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



<sup>1</sup>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

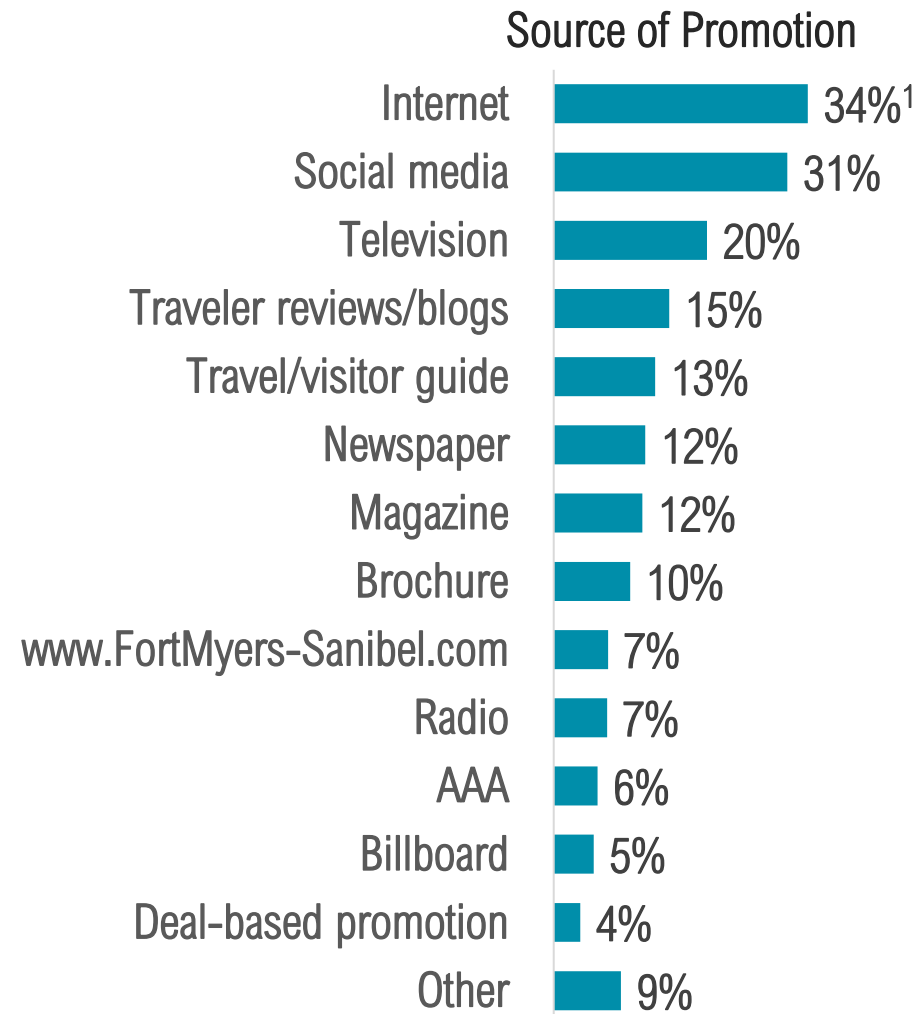


<sup>1</sup>Three responses permitted.



# PROMOTIONS

35% of visitors recalled promotions in the past 6 months for The Beaches of Fort Myers & Sanibel.

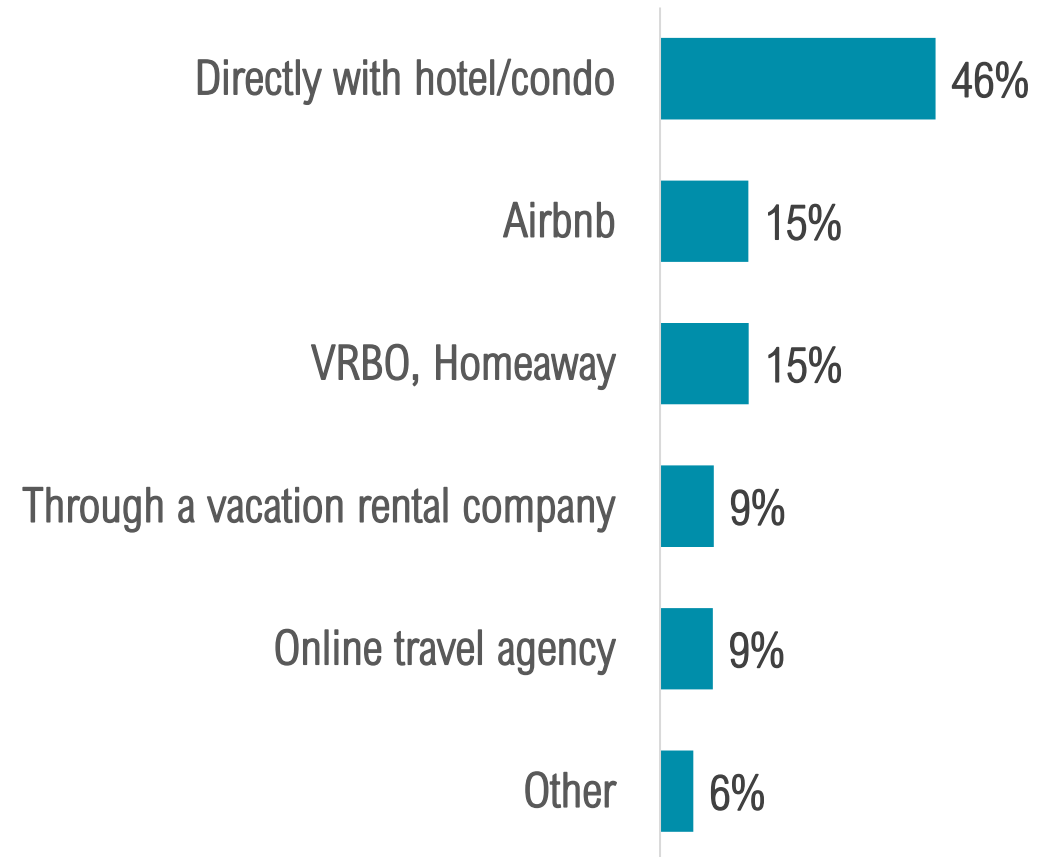


<sup>1</sup>Multiple responses permitted.

# BOOKING



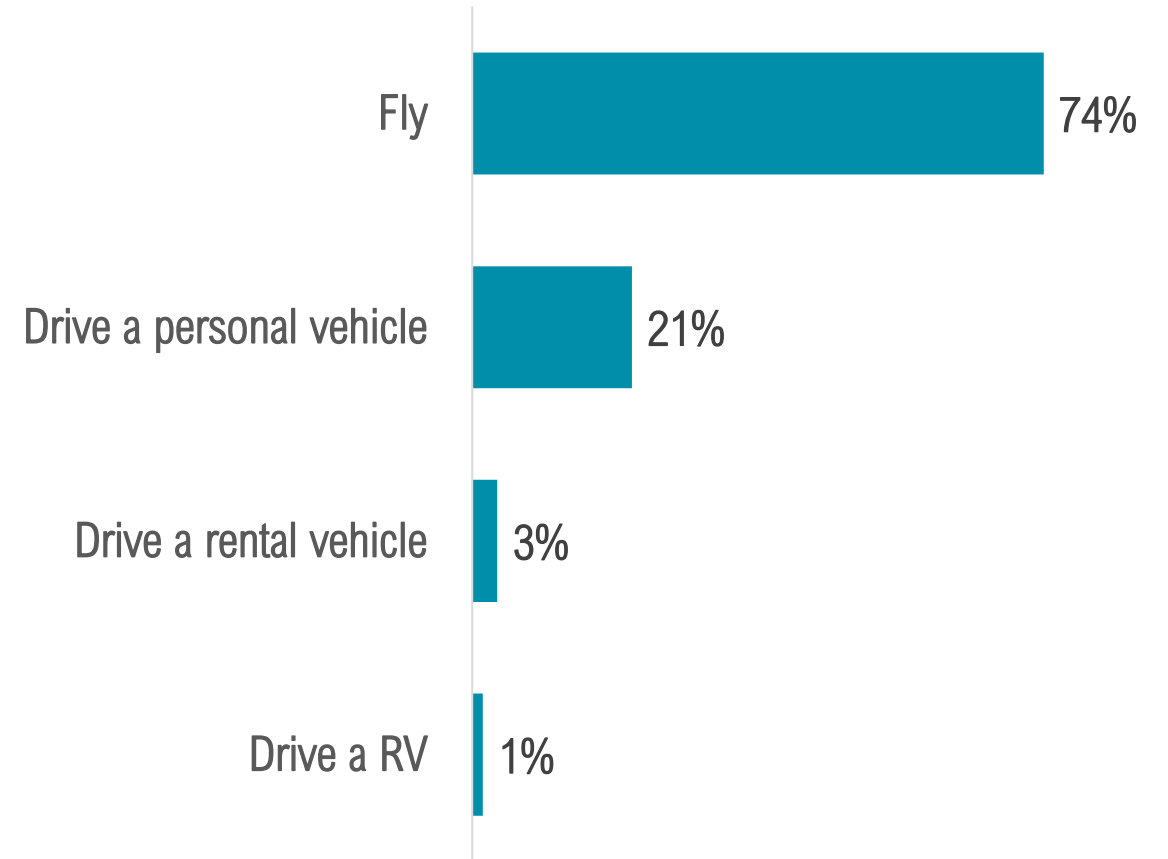
Over **2 in 5** visitors who stayed in paid accommodations **booked directly with a hotel/condo.**



# TRANSPORTATION



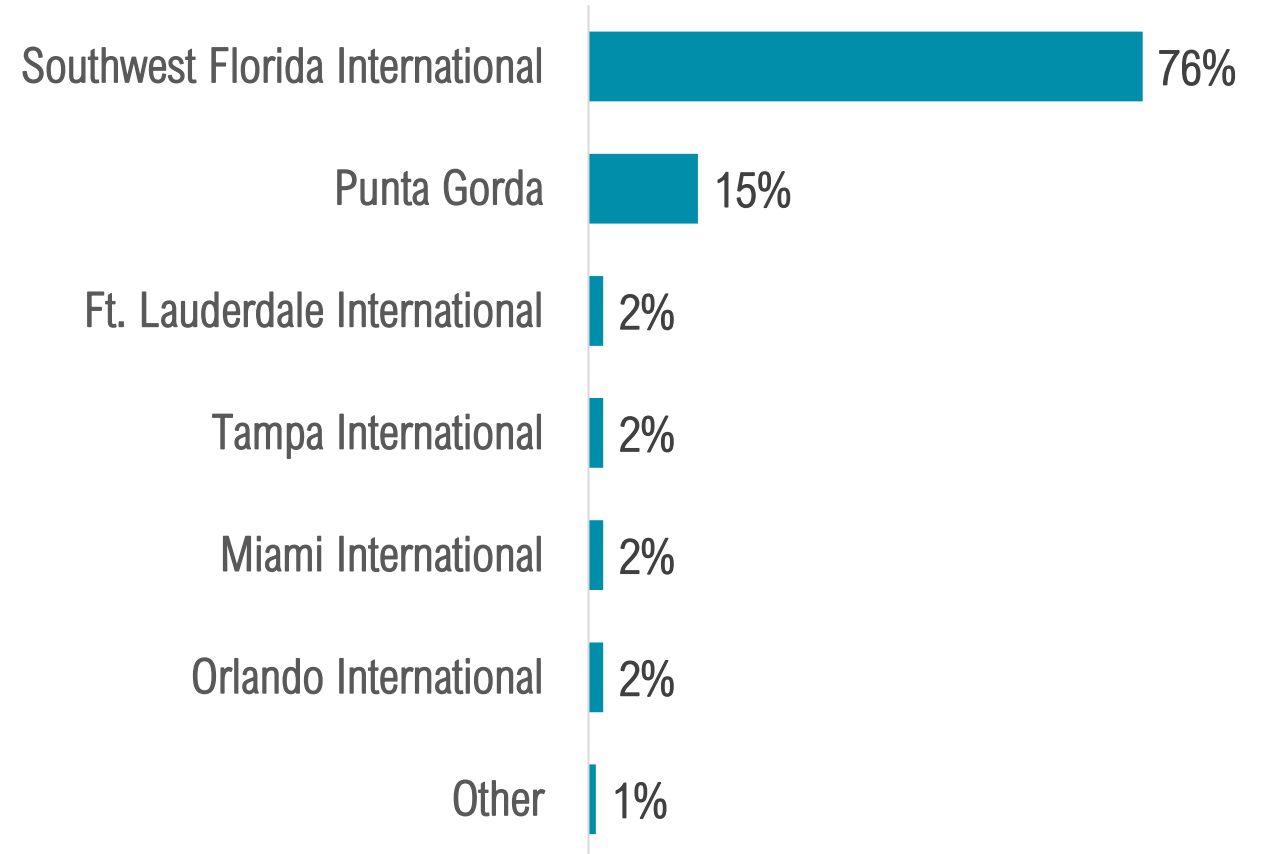
**3 in 4** visitors **flew** to The Beaches of Fort Myers & Sanibel.



# AIRPORT

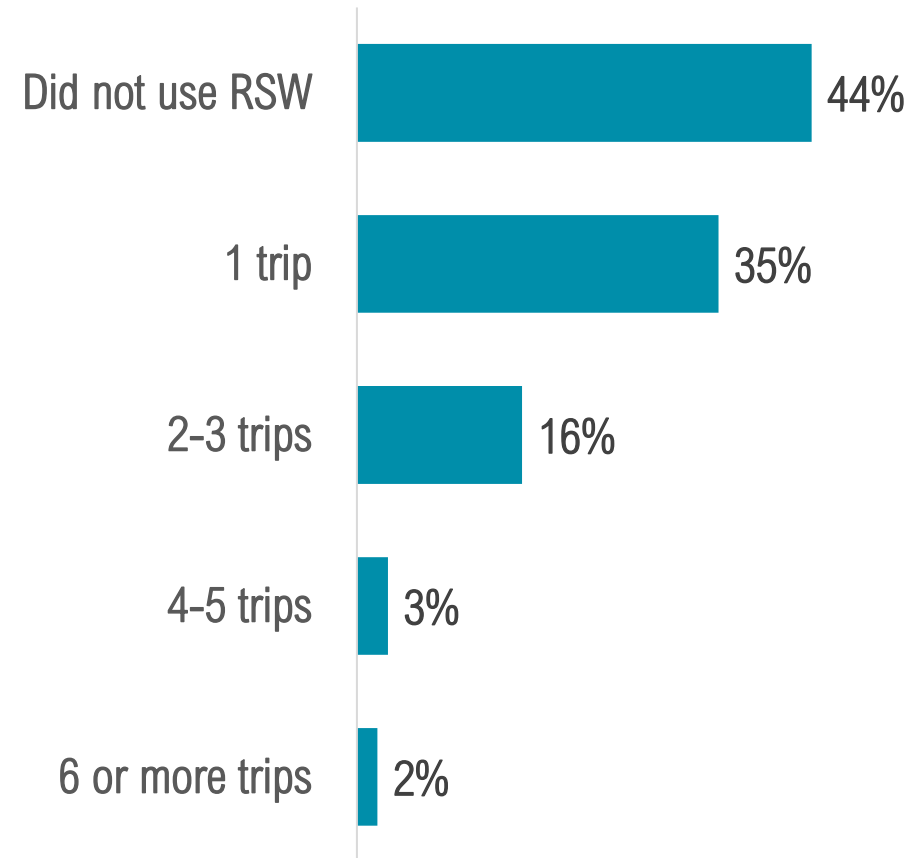


**3 in 4** visitors who flew to The Beaches of Fort Myers & Sanibel came through **RSW**.



# USE OF RSW IN THE PAST YEAR

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

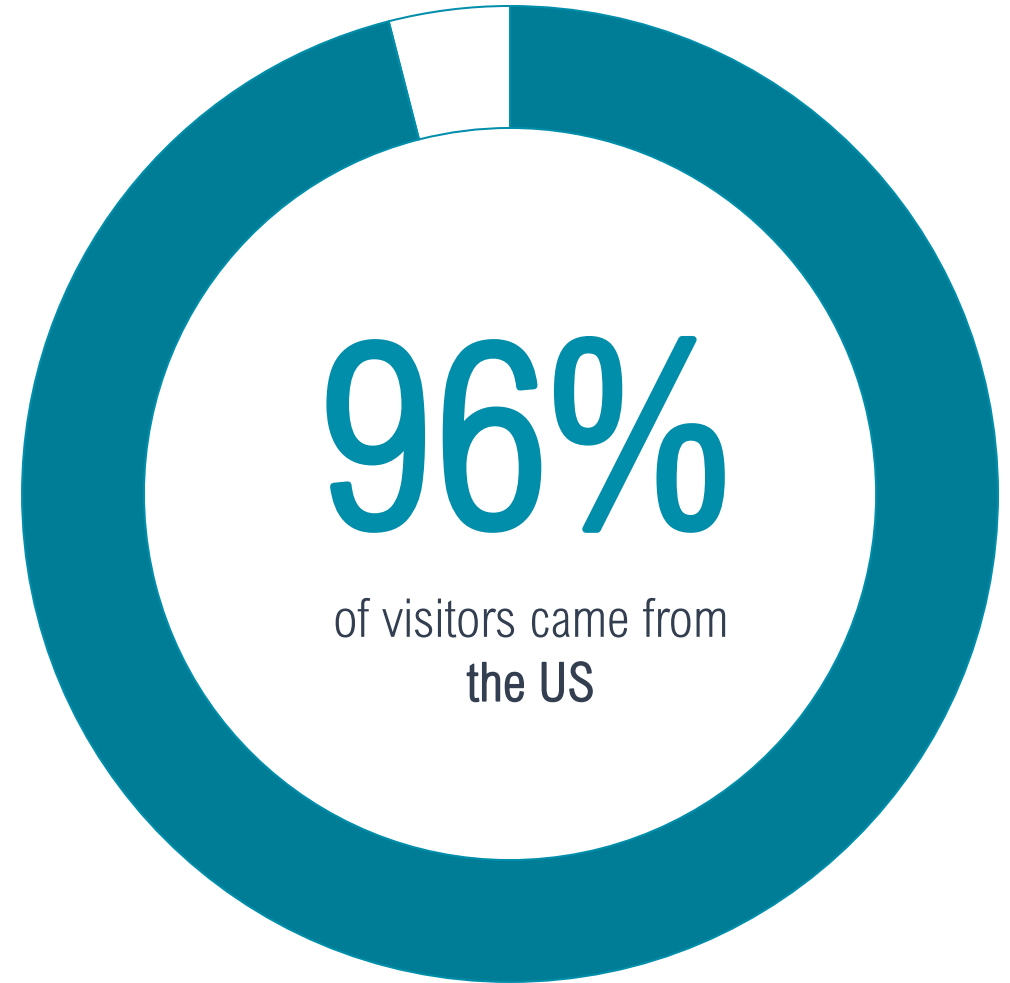
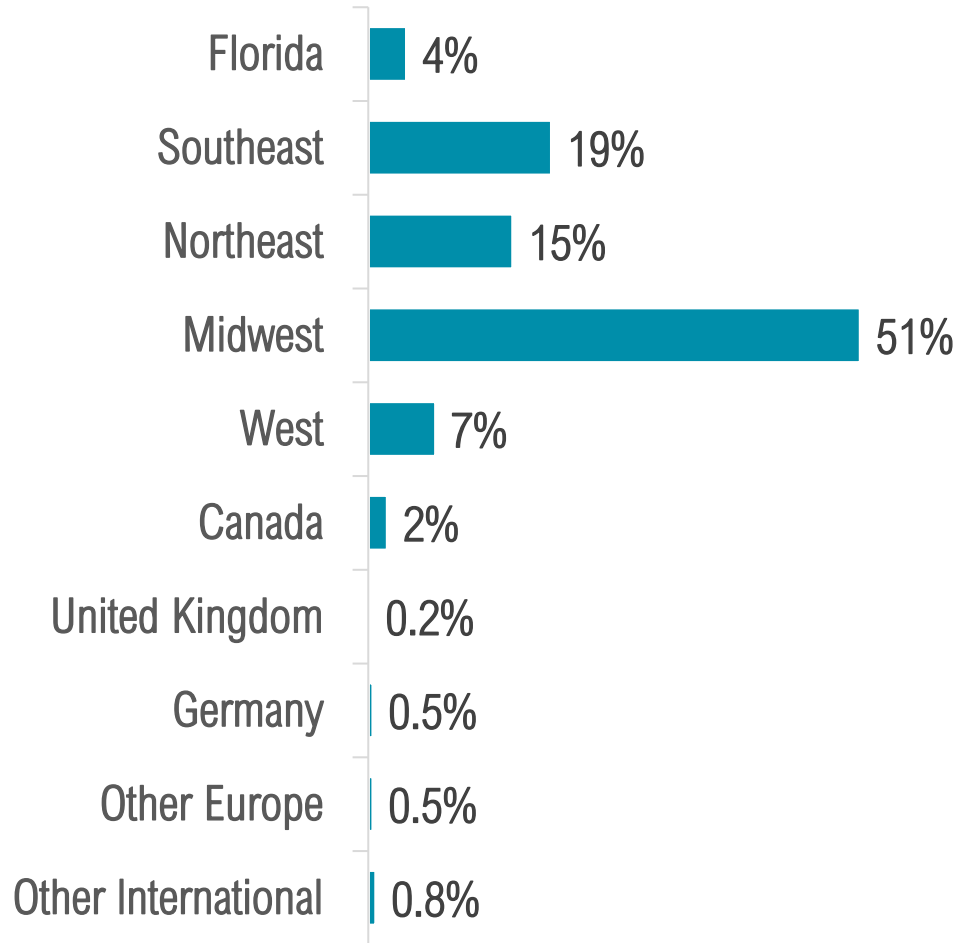




# VISITOR JOURNEY: TRAVEL PARTY PROFILE

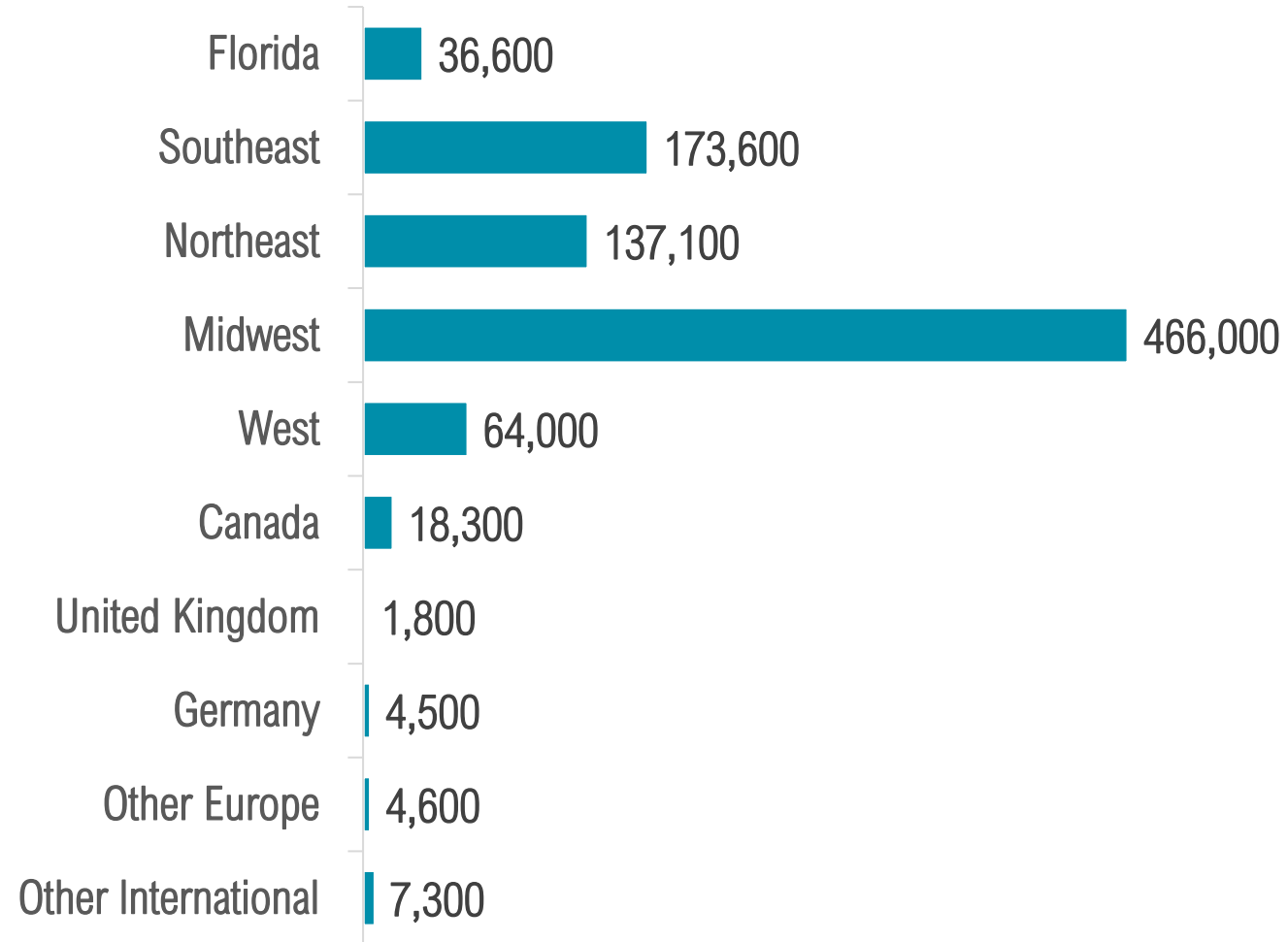


# ORIGIN<sup>1</sup>

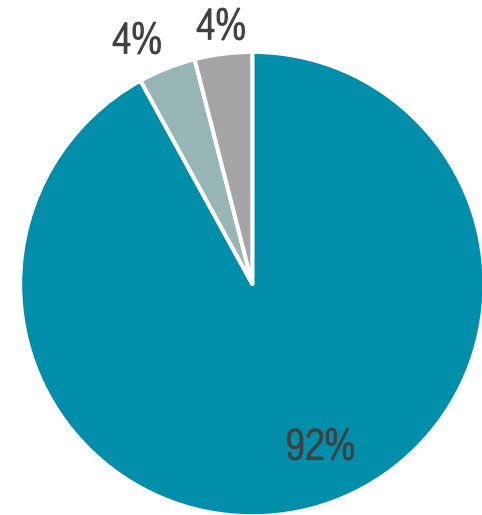
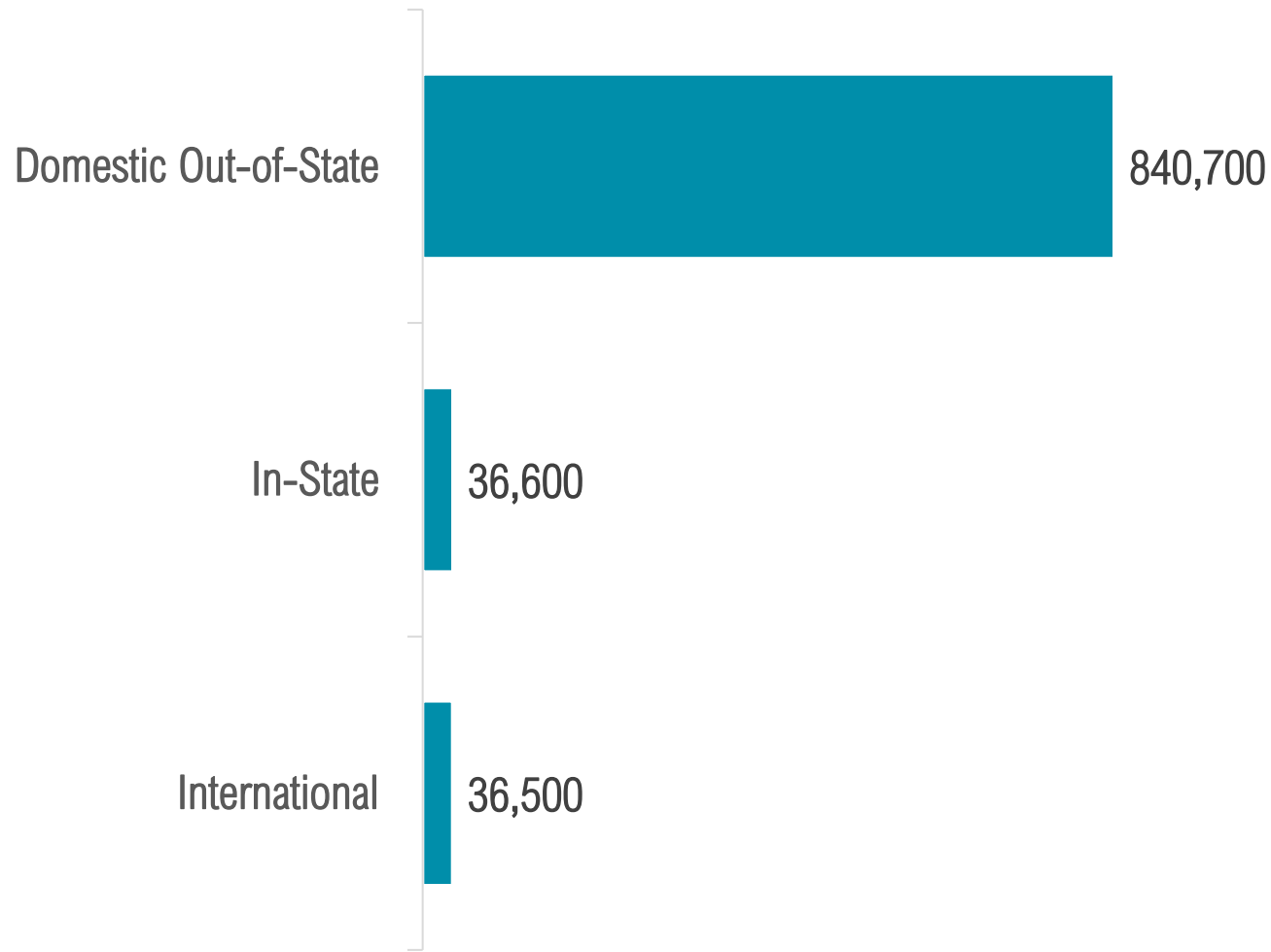


<sup>1</sup>Includes visitors who stayed in paid accommodations, VFRs, and day trippers.

# NUMBER OF VISITORS BY ORIGIN



# NUMBER OF VISITORS BY ORIGIN



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

# ORIGIN COUNTRY

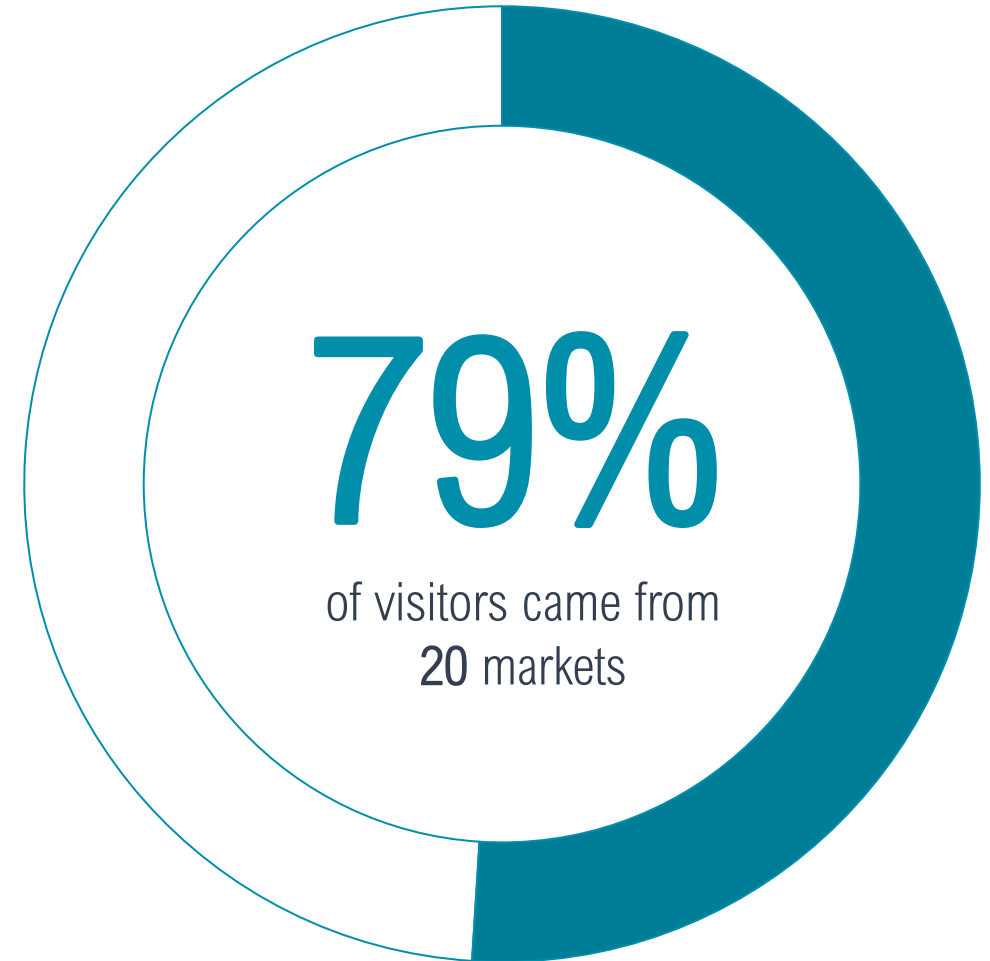
| Country <sup>1</sup> | % of Visitors |
|----------------------|---------------|
| United States        | 96%           |
| Canada               | 2%            |
| Germany              | 0.5%          |
| United Kingdom       | 0.2%          |
| Other Europe         | 0.5%          |
| Other                | 0.8%          |

<sup>1</sup>0.5% or fewer visitors came from Belgium, Brazil, Chile, Colombia, Denmark, Finland, Jamaica, Mexico, Netherlands, Norway, Peru, Sweden or Venezuela.



# ORIGIN MARKETS<sup>1</sup>

| Market                  | Percentage of Visitors |
|-------------------------|------------------------|
| Minneapolis-Saint Paul  | 8%                     |
| Chicago                 | 8%                     |
| New York City           | 6%                     |
| Columbus                | 6%                     |
| Detroit                 | 5%                     |
| Indianapolis            | 5%                     |
| Cleveland-Akron         | 5%                     |
| Washington DC-Baltimore | 4%                     |
| Milwaukee               | 4%                     |
| Atlanta                 | 4%                     |
| St. Louis               | 4%                     |
| Boston                  | 3%                     |
| Grand Rapids            | 3%                     |
| Cincinnati              | 2%                     |
| Green Bay-Appleton      | 2%                     |
| Nashville               | 2%                     |
| Philadelphia            | 2%                     |
| Dallas-Ft. Worth        | 2%                     |
| Jacksonville            | 2%                     |
| Tulsa                   | 2%                     |



<sup>1</sup>Includes visitors who stayed in paid accommodations, VFRs, and day trippers.

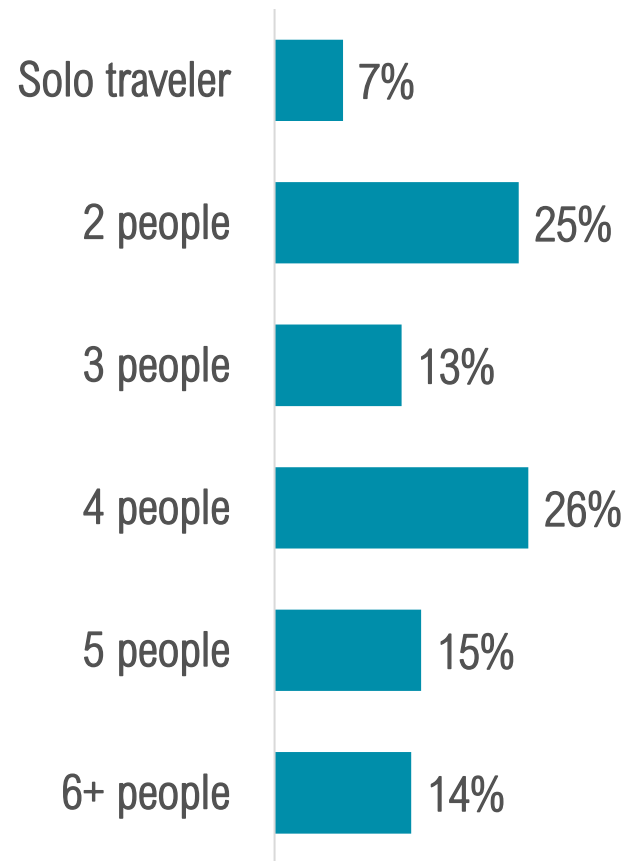
# TRAVEL PARTY SIZE AND COMPOSITION

## *Travel Party Size*

Visitors traveled in a party composed of **3.6<sup>1</sup> people**.

## *Travel with Children*

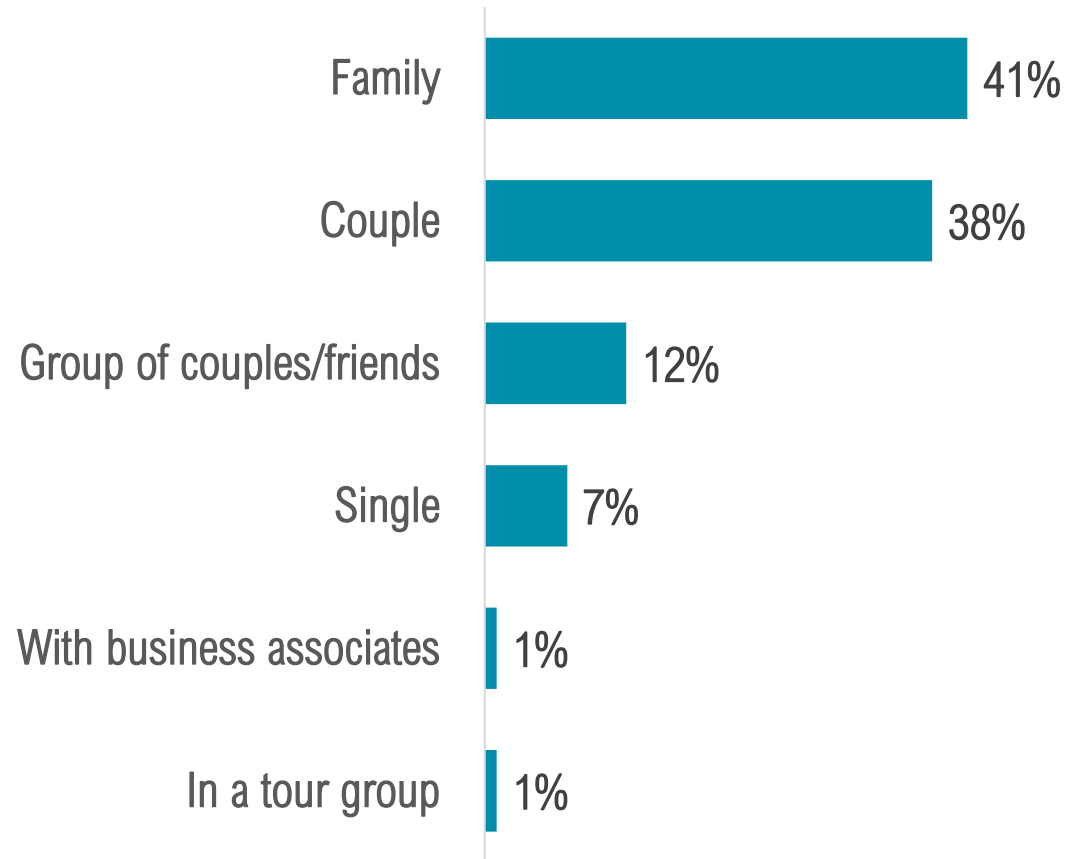
**35%** of visitors **traveled with children** under the age of 18.



<sup>1</sup>Source: Visitor Tracking Survey, includes all types of visitors

# TRAVEL PARTY TYPE

41% of visitors traveled as a **family**, while 38% traveled as a **couple**.

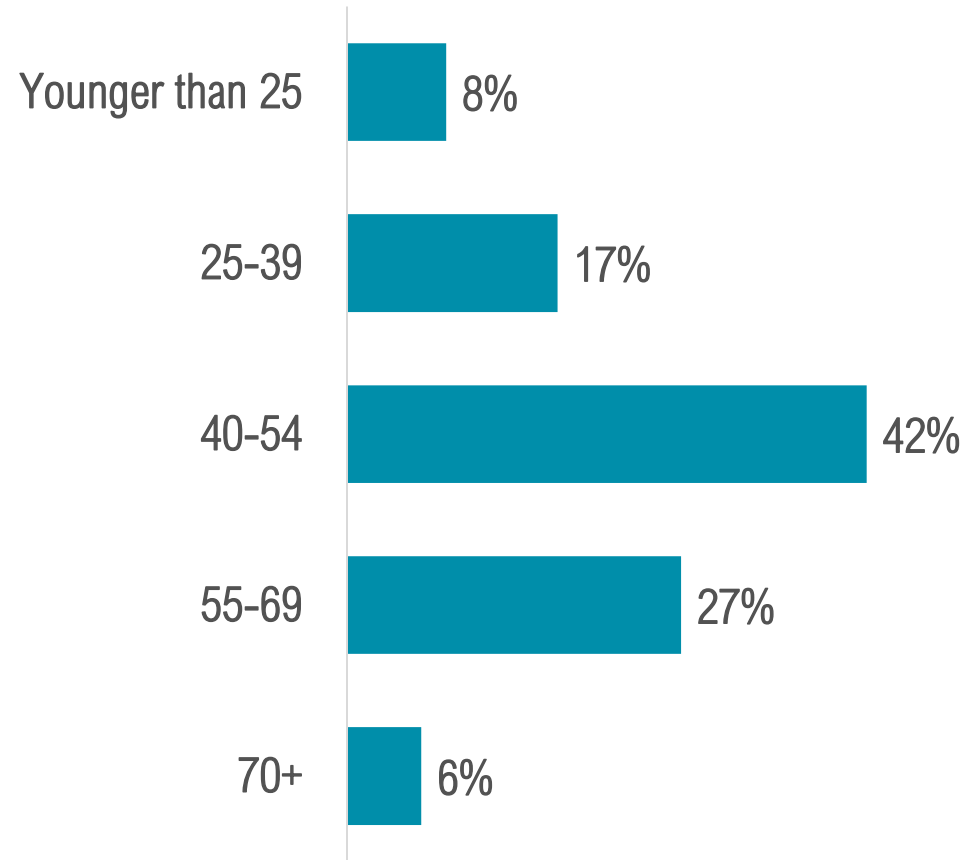


# AGE



## *Average Age*

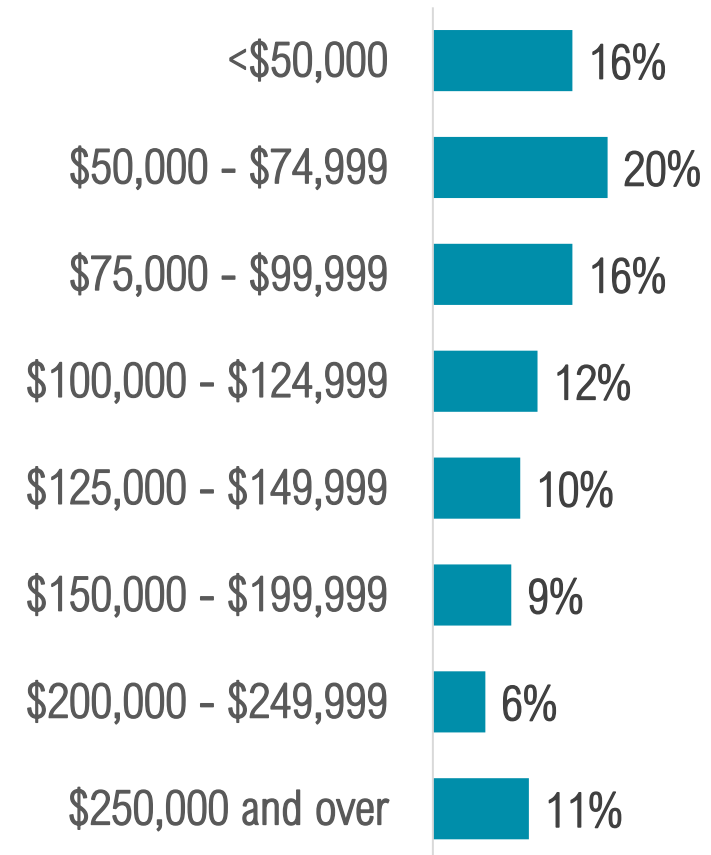
The average age of Jan – Mar visitors was **50 years old.**



# HOUSEHOLD INCOME

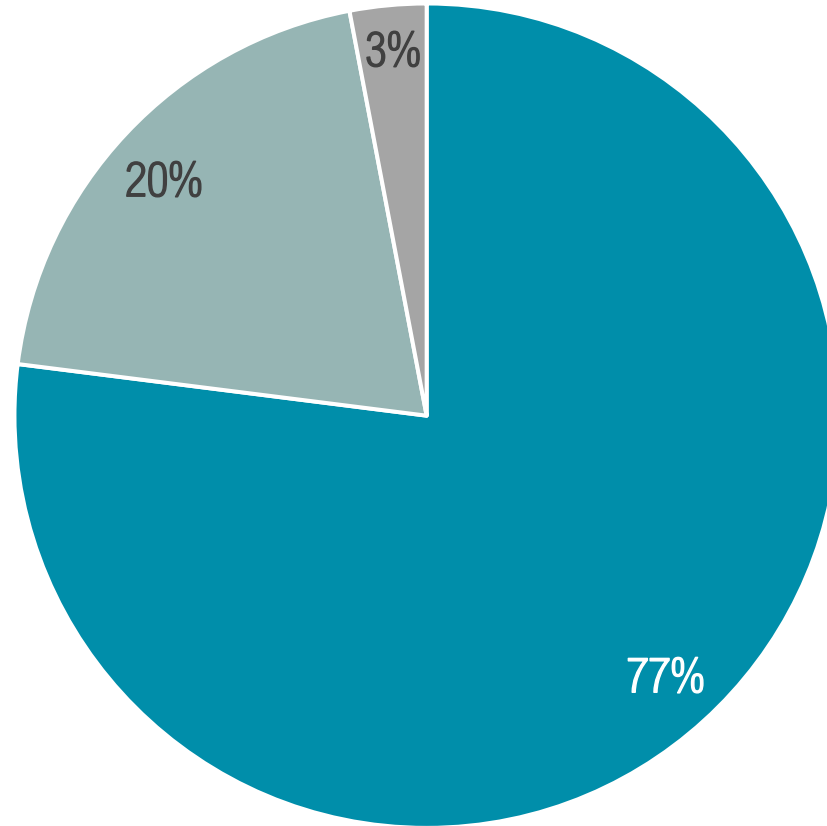
## *Median Household Income*

Jan – Mar visitors had a median household income of **\$96,900**.





# MARITAL STATUS



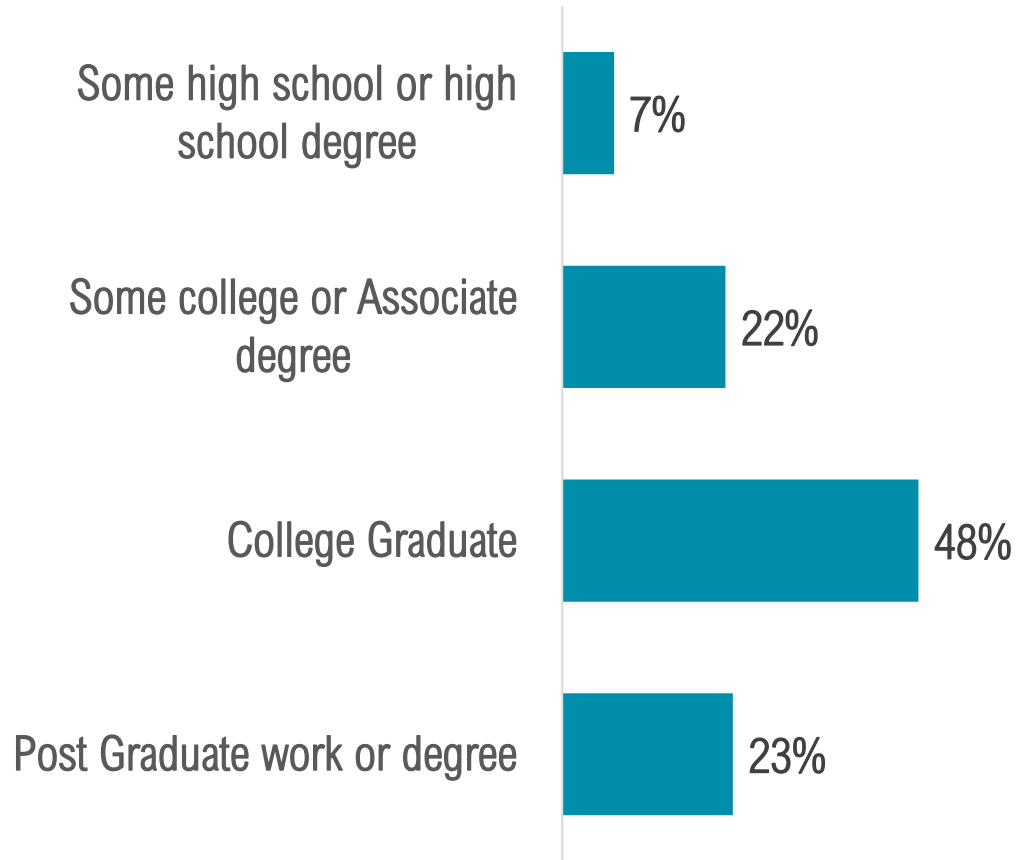
■ Married ■ Single ■ Other

# EDUCATION

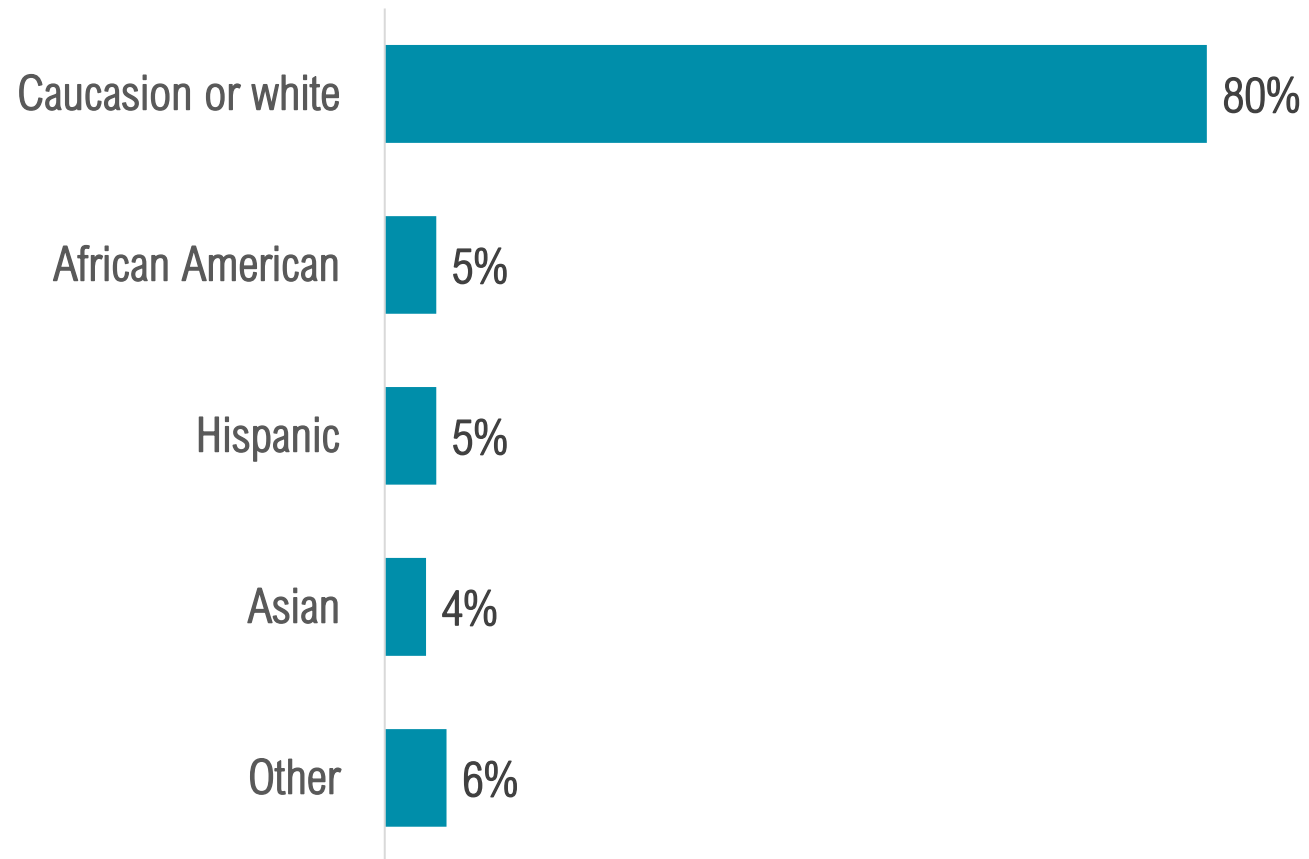


## *College Education*

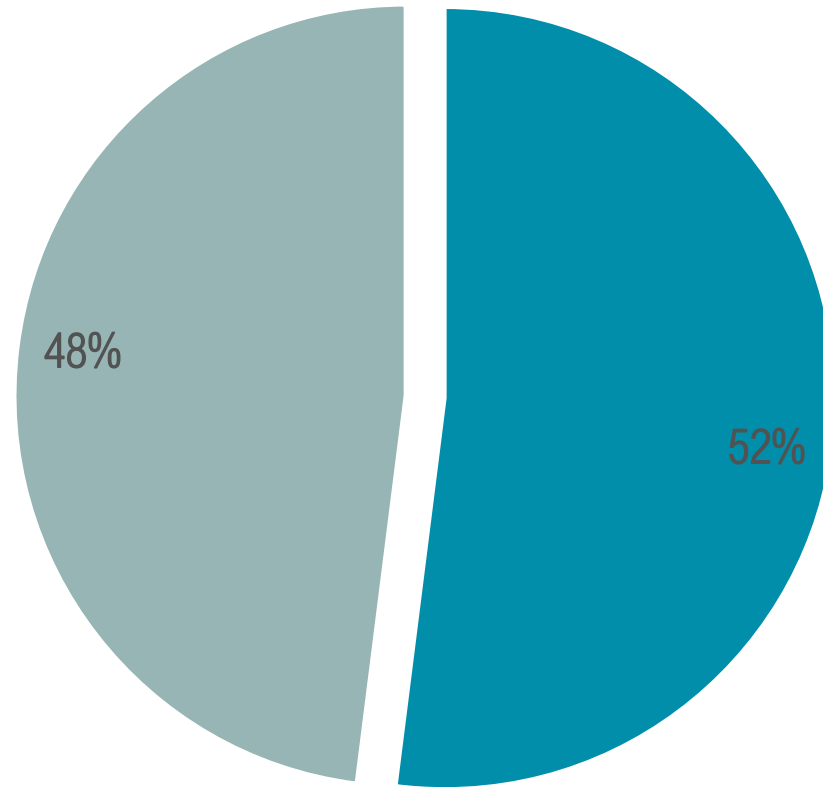
**71%** of Jan – Mar visitors were college graduates.



# RACE/ETHNICITY



# GENDER



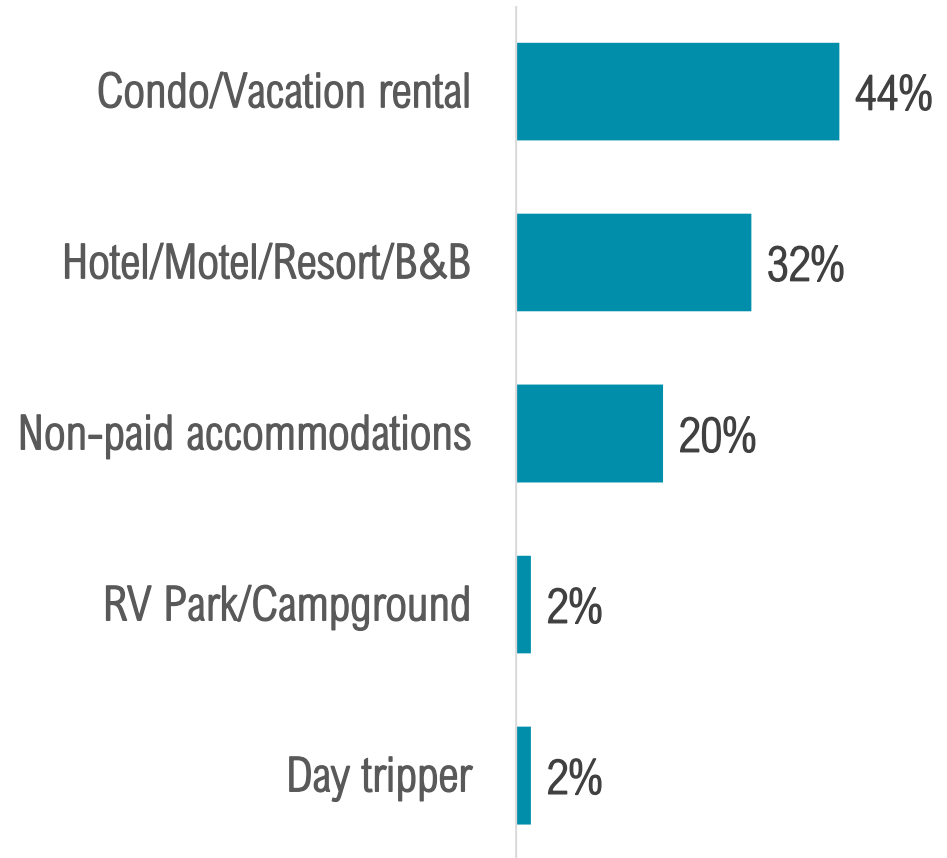
■ Male ■ Female

# VISITOR JOURNEY: TRIP EXPERIENCE



# ACCOMMODATIONS

Over 3 in 4 visitors stayed in **paid accommodations** such as a hotel/motel/resort/B&B, condo/vacation rental, or a RV Park/Campground.





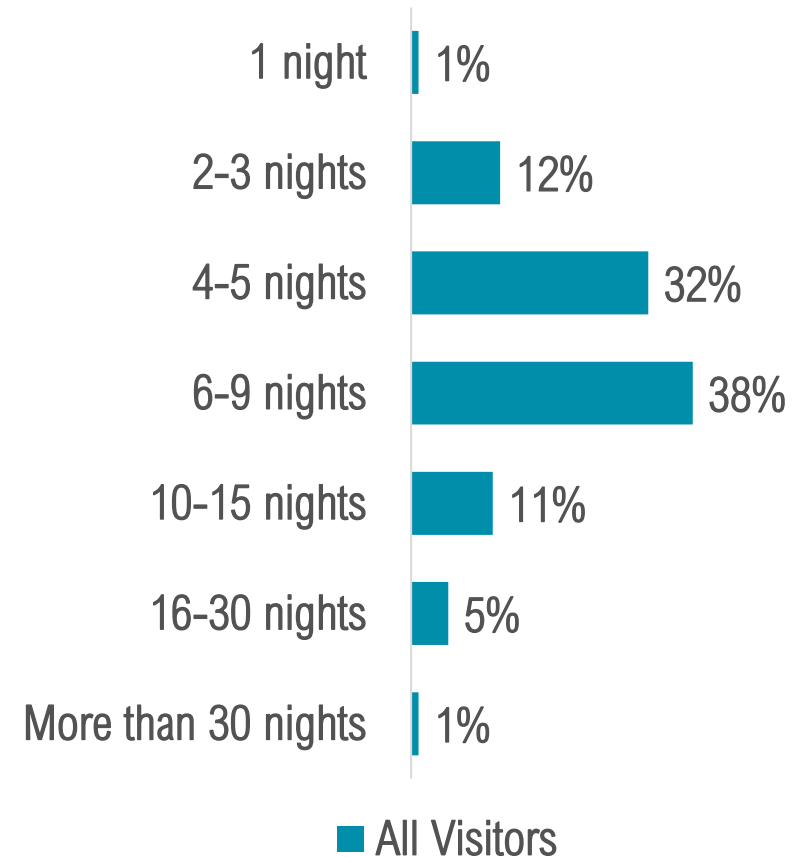
# NIGHTS STAYED

## *All Visitors*

Visitors spent **8.9<sup>1</sup> nights** in The Beaches of Fort Myers & Sanibel.

## *Visitors Staying in Paid Accommodations*

Visitors staying in paid accommodations spent **7.5<sup>2</sup> nights** in The Beaches of Fort Myers & Sanibel.



<sup>1</sup>When including extended stay visitors, average nights stayed for all visitors was 9.5 nights.

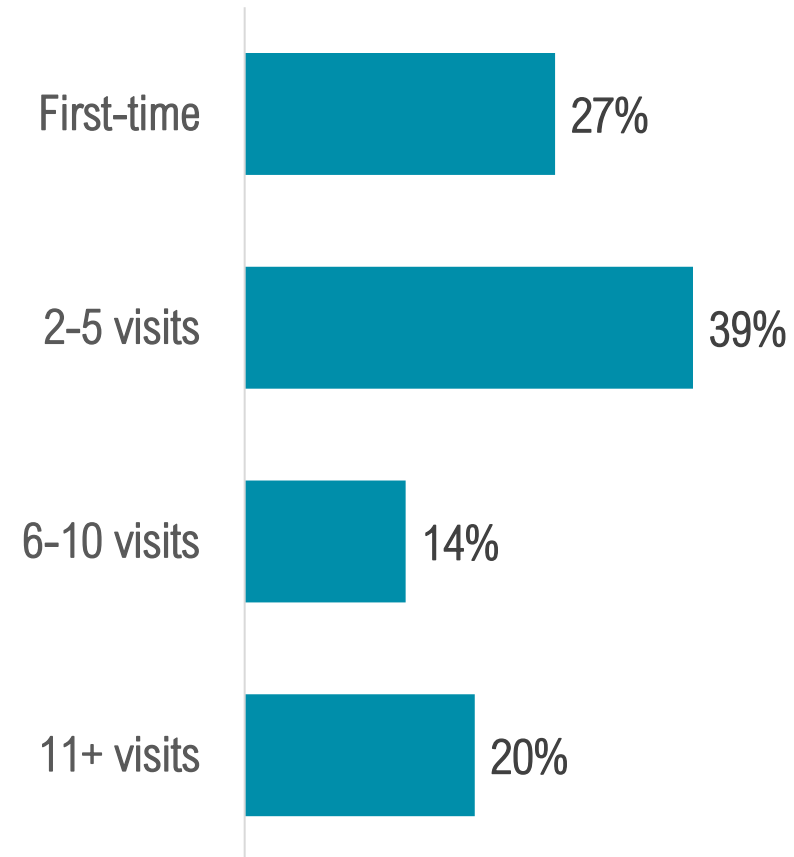
Source: Visitor Tracking Survey

<sup>2</sup>When including extended stay visitors, average nights stayed for visitors staying in paid accommodations was 7.9 nights. Source: Visitor Tracking Survey

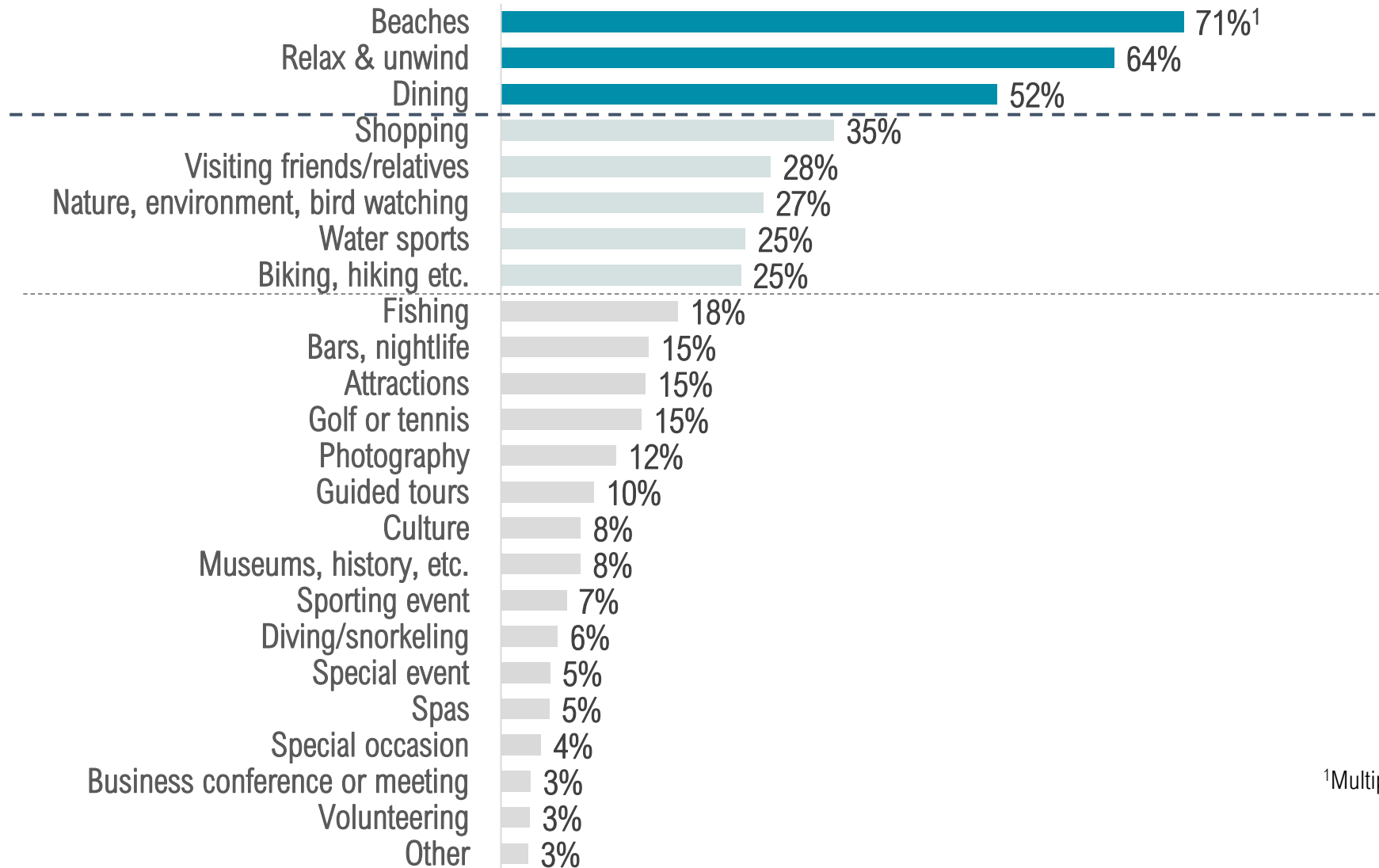
# FIRST TIME AND EXPERIENCED VISITORS



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



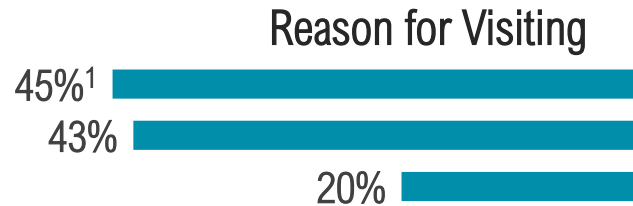
# VISITOR ACTIVITIES



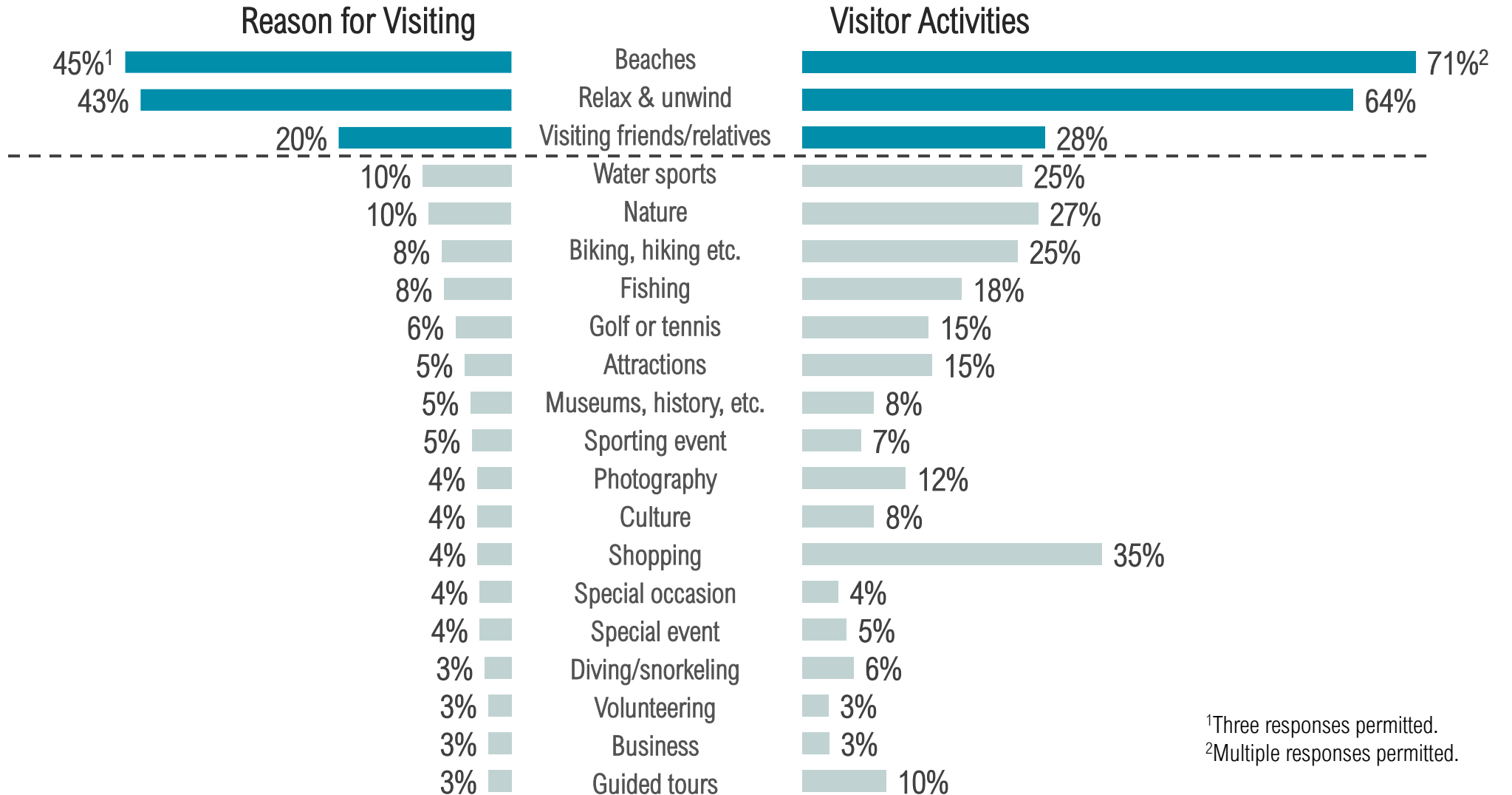
<sup>1</sup>Multiple responses permitted.

# REASON FOR VISITING VS. VISITOR ACTIVITIES

## Key Reasons for Visiting



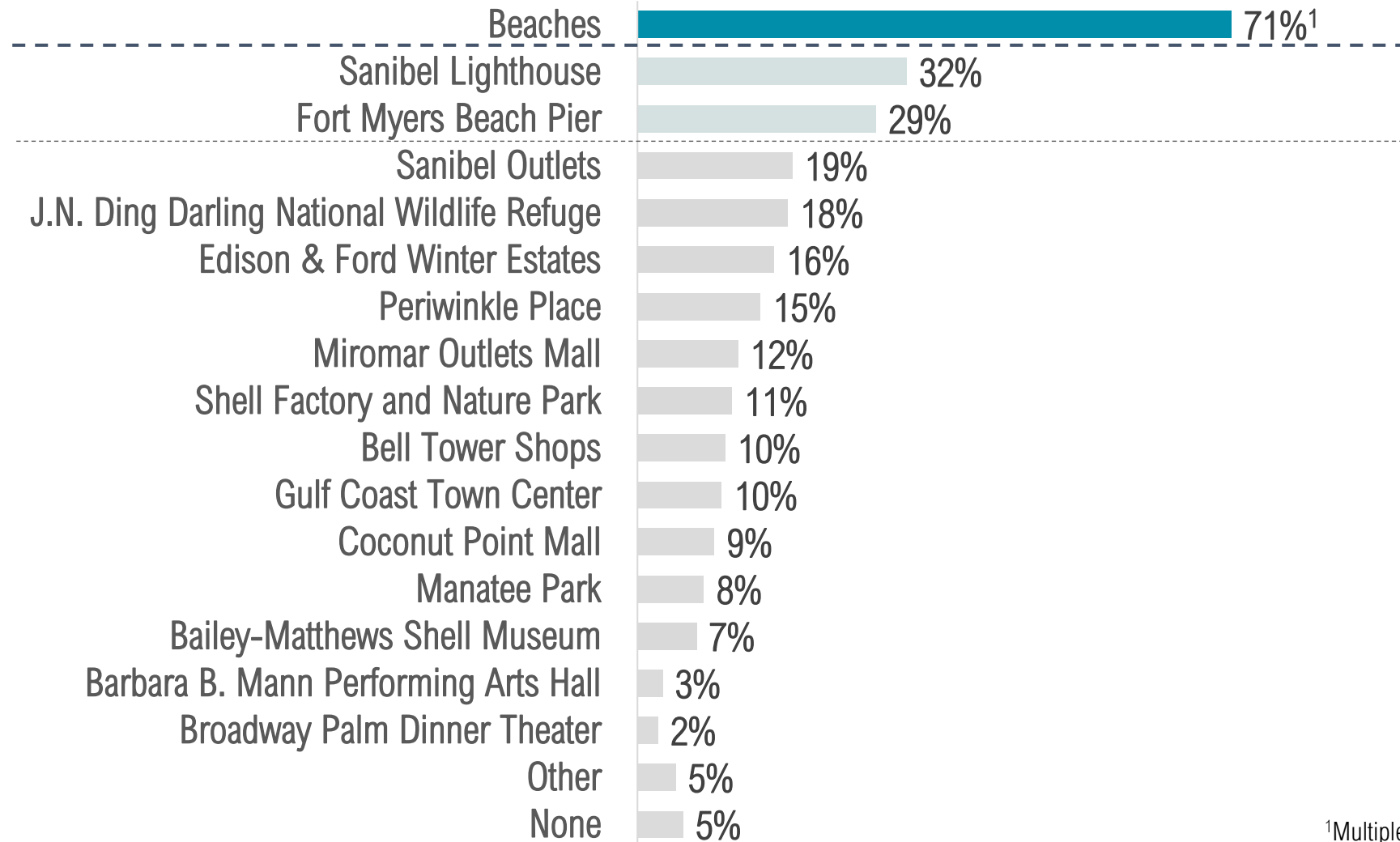
## Trip Enhancements



<sup>1</sup>Three responses permitted.

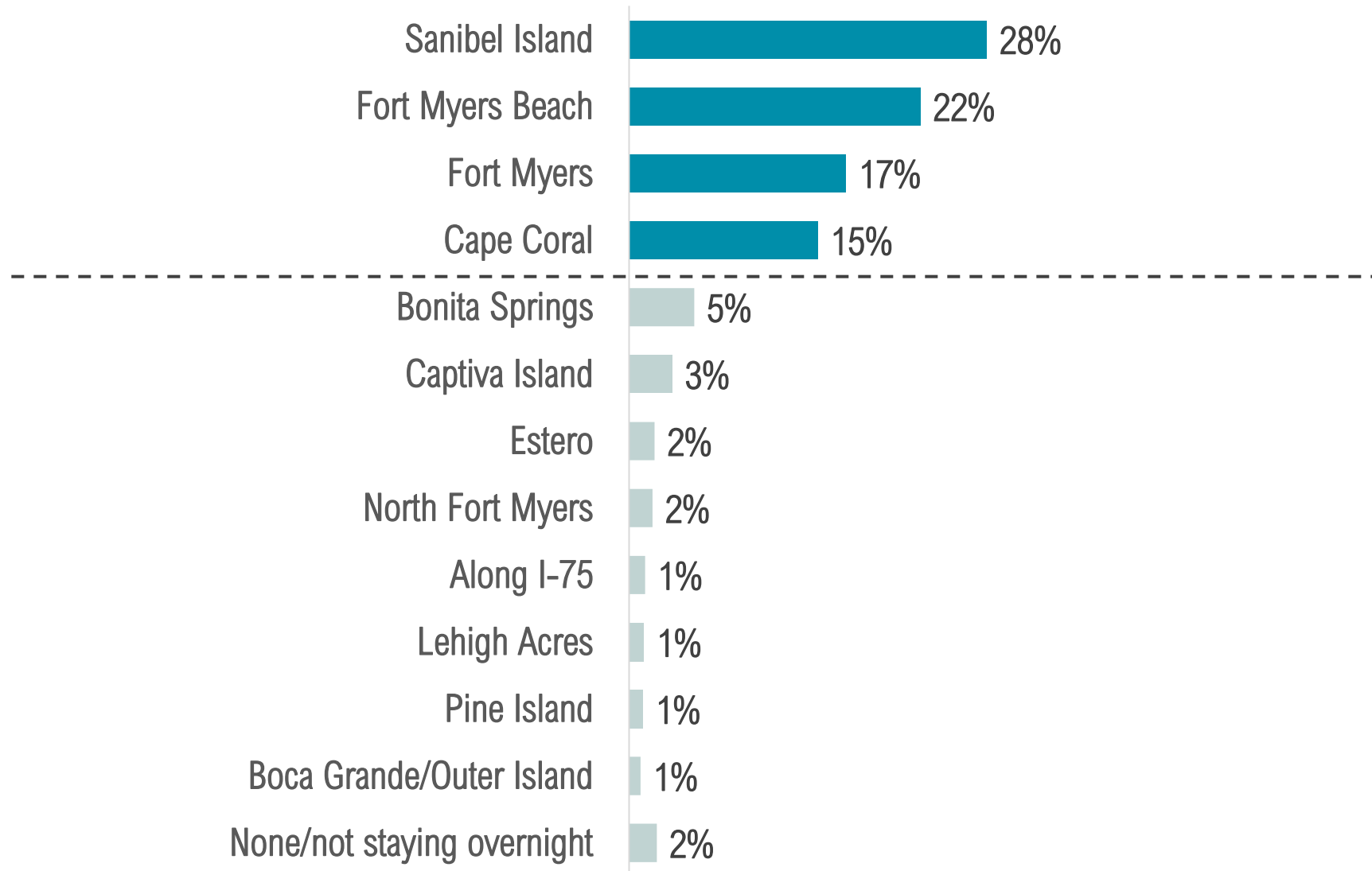
<sup>2</sup>Multiple responses permitted.

# ATTRACTIONS VISITED



<sup>1</sup>Multiple responses permitted.

# COMMUNITY STAYED



Travel Party Profile  
Jan – Mar 2021

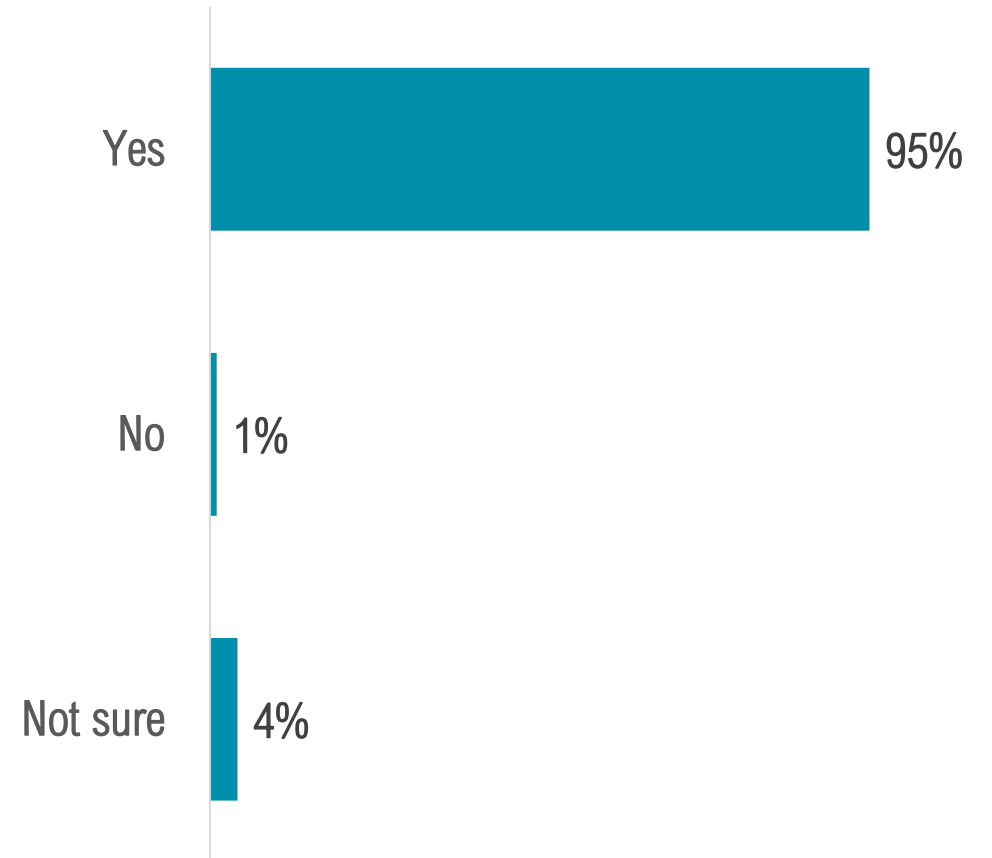


# VISITOR JOURNEY: POST-TRIP EVALUATION



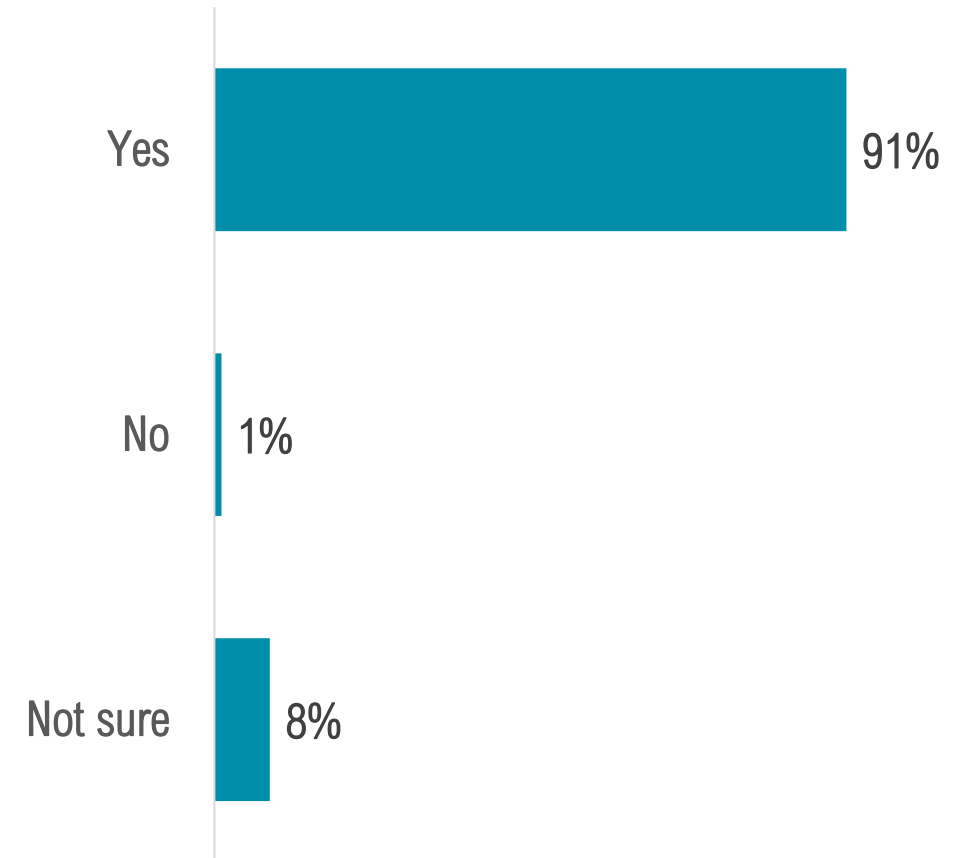
# LIKELY TO RECOMMEND

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



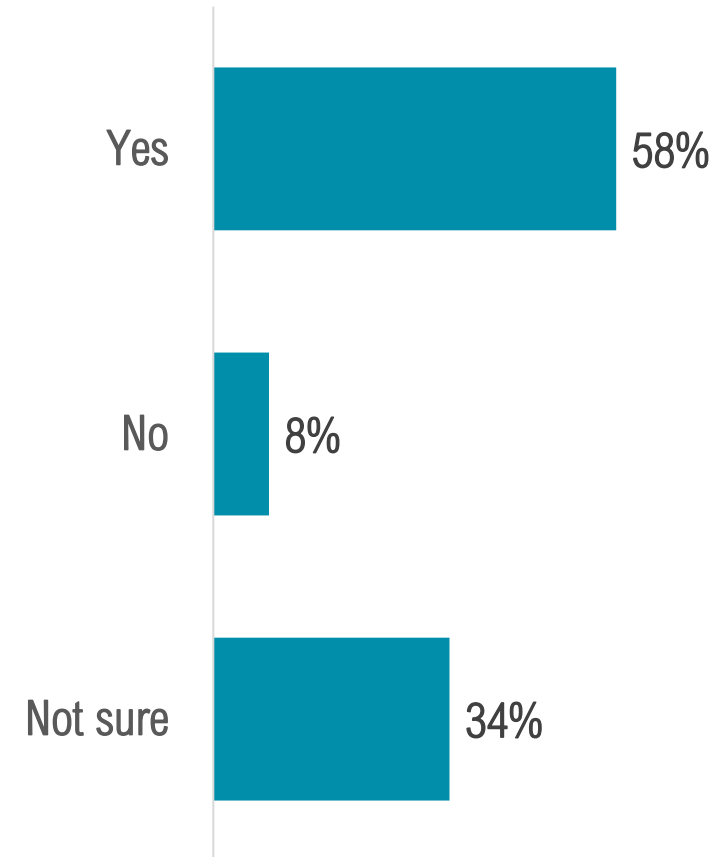
# LIKELY TO RETURN

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



# LIKELY TO RETURN NEXT YEAR

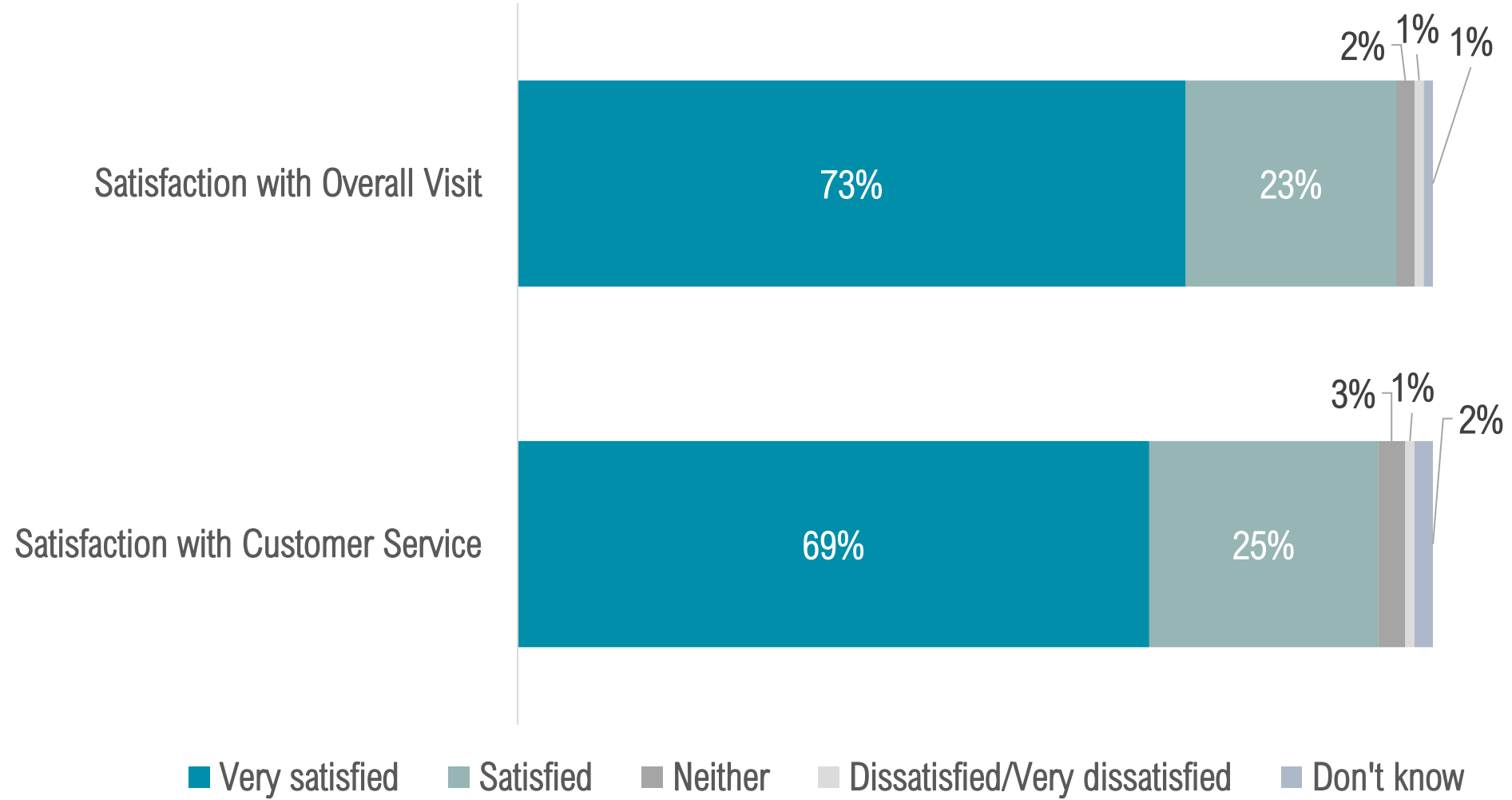
**Nearly 3 in 5** visitors are likely to return to The Beaches of Ft. Myers & Sanibel next year



# SATISFACTION RATINGS

|                            | 1 <sup>st</sup> Time Visitors |      | Repeat Visitors |      | U.S. Residents |      | International Residents |      |
|----------------------------|-------------------------------|------|-----------------|------|----------------|------|-------------------------|------|
|                            | 2020                          | 2021 | 2020            | 2021 | 2020           | 2021 | 2020                    | 2021 |
| Likely to Recommend        | 90%                           | 89%  | 96%             | 97%  | 95%            | 95%  | 93%                     | 94%  |
| Likely to Return           | 84%                           | 81%  | 96%             | 96%  | 94%            | 93%  | 91%                     | 81%  |
| Likely to Return Next Year | 42%                           | 31%  | 81%             | 67%  | 75%            | 59%  | 61%                     | 43%  |

# SATISFACTION



# SATISFACTION RATINGS: OVERALL VISIT

|                | 1 <sup>st</sup> Time Visitors |      | Repeat Visitors |      | U.S. Residents |      | International Residents |      |
|----------------|-------------------------------|------|-----------------|------|----------------|------|-------------------------|------|
|                | 2020                          | 2021 | 2020            | 2021 | 2020           | 2021 | 2020                    | 2021 |
| Very Satisfied | 59%                           | 61%  | 72%             | 77%  | 70%            | 73%  | 76%                     | 64%  |
| Satisfied      | 37%                           | 34%  | 25%             | 21%  | 28%            | 24%  | 20%                     | 32%  |

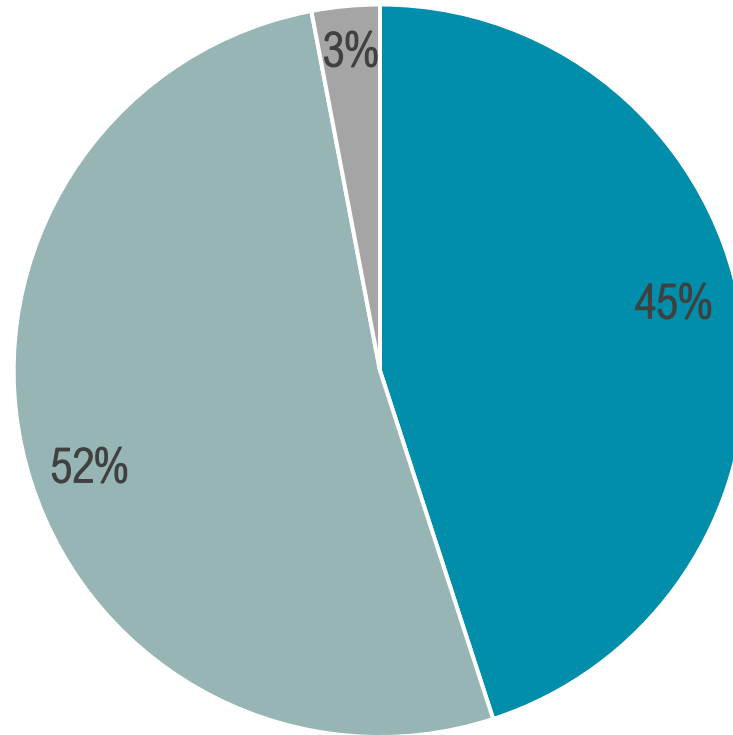


# SATISFACTION RATINGS: CUSTOMER SERVICE

|                | 1 <sup>st</sup> Time Visitors |      | Repeat Visitors |      | U.S. Residents |      | International Residents |      |
|----------------|-------------------------------|------|-----------------|------|----------------|------|-------------------------|------|
|                | 2020                          | 2021 | 2020            | 2021 | 2020           | 2021 | 2020                    | 2021 |
| Very Satisfied | 56%                           | 56%  | 64%             | 67%  | 62%            | 64%  | 69%                     | 55%  |
| Satisfied      | 36%                           | 35%  | 29%             | 28%  | 31%            | 30%  | 23%                     | 36%  |

# SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

Quality of Accommodations



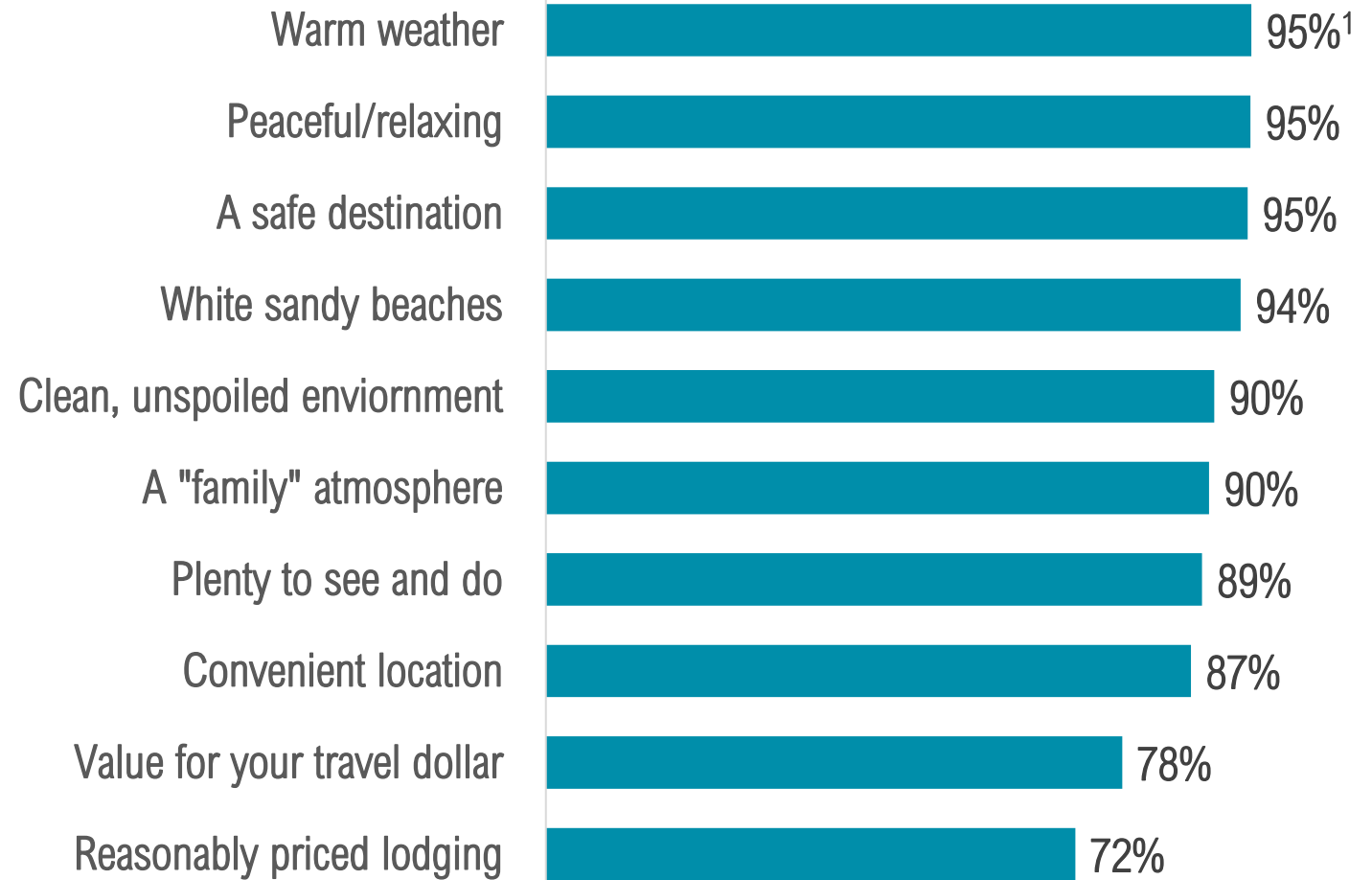
■ Exceeded expectations   ■ Met expectations   ■ Did not meet expectations

# SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

|                           | 1 <sup>st</sup> Time Visitors |      | Repeat Visitors |      | U.S. Residents |      | International Residents |      |
|---------------------------|-------------------------------|------|-----------------|------|----------------|------|-------------------------|------|
|                           | 2020                          | 2021 | 2020            | 2021 | 2020           | 2021 | 2020                    | 2021 |
| Exceeded Expectations     | 39%                           | 47%  | 33%             | 45%  | 33%            | 46%  | 36%                     | 37%  |
| Met Expectations          | 57%                           | 50%  | 63%             | 52%  | 63%            | 51%  | 59%                     | 60%  |
| Did Not Meet Expectations | 4%                            | 4%   | 3%              | 3%   | 4%             | 3%   | 6%                      | 3%   |

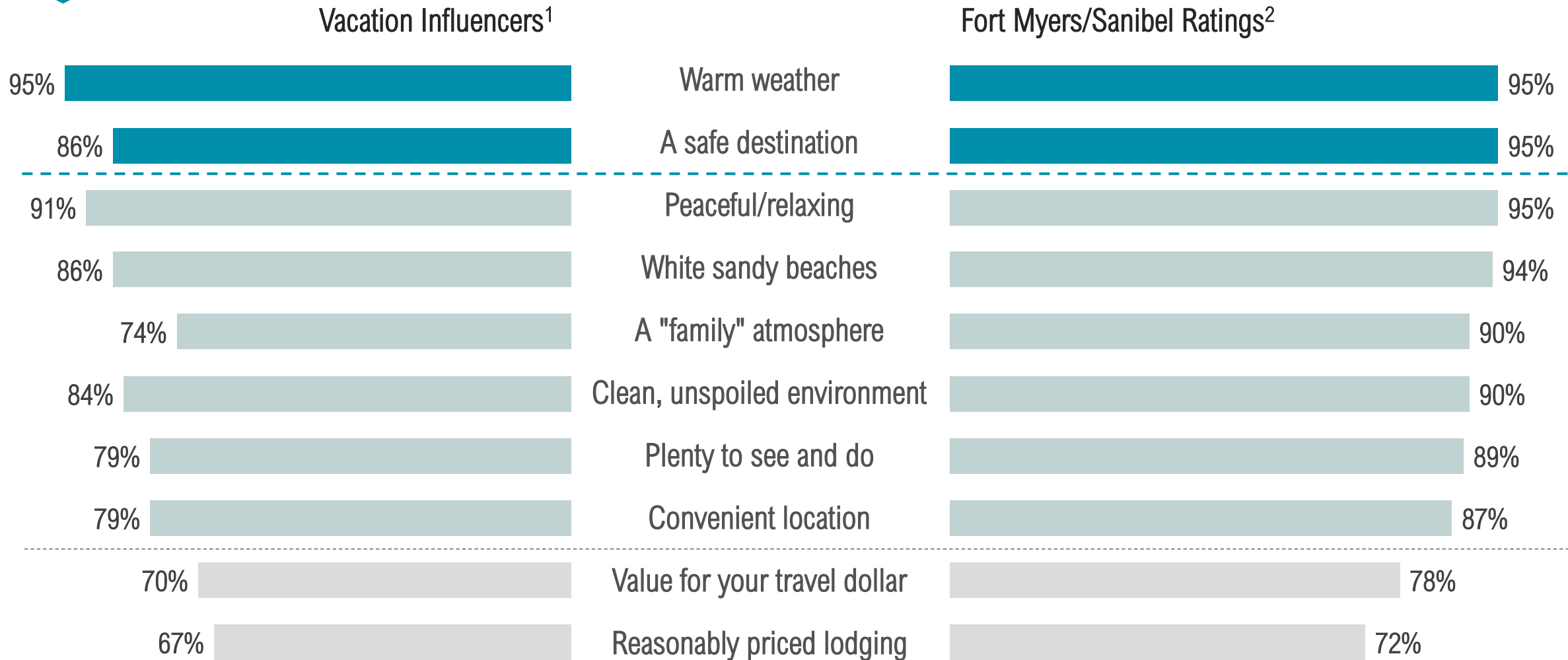
# ATTRIBUTE RATINGS

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



<sup>1</sup>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

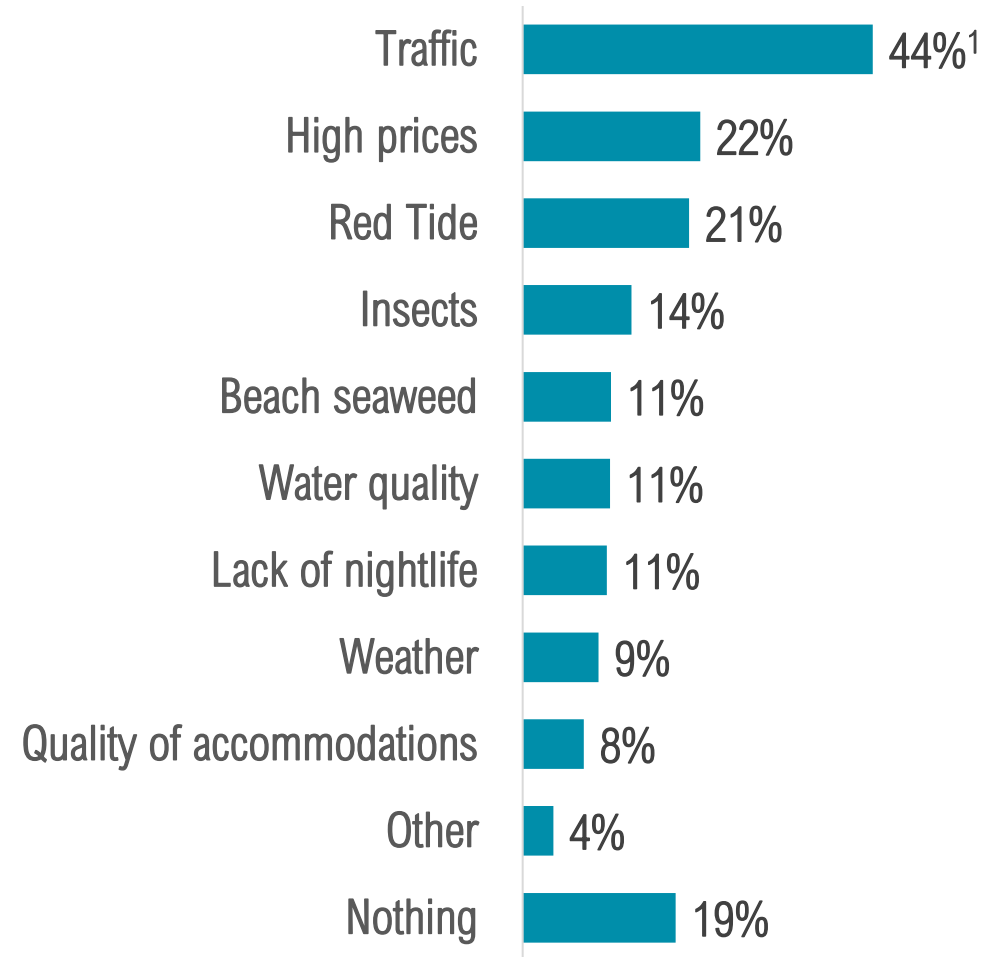


<sup>1</sup>Top 2 box scores. Attributes rated on a scale from 1 to 5 where 1 is Not at All Influential and 5 is Definitely Influential.

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

# VISITOR CONCERNS

Over 2 in 5 visitors were concerned about **traffic** during their visit.

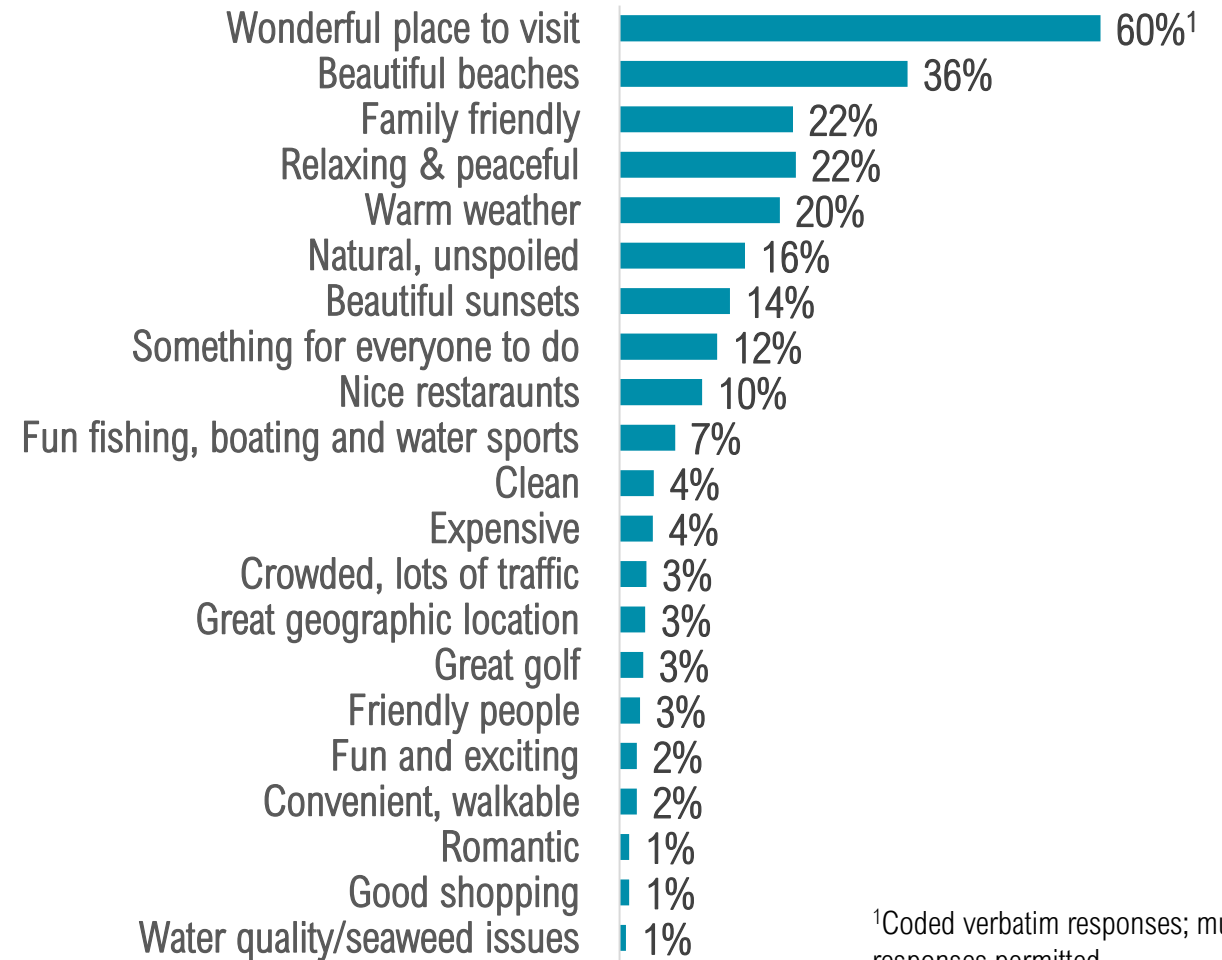


<sup>1</sup>Multiple responses permitted.

# AREA DESCRIPTIONS



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



<sup>1</sup>Coded verbatim responses; multiple responses permitted.

# AREA DESCRIPTIONS



## Wonderful Place to Visit

- “Wonderful place to vacation, perfect weather, gorgeous beaches, unbelievable sunsets, great restaurants, and lots of things to do for the family.”
- “One of our favorite vacation destinations. Perfect weather this time of year, beautiful beaches, incredible sunsets, and great golf courses.”
- “One of the best vacations we have ever taken. Great weather, a tropical environment, and a safe and secure place to visit.”



## Beautiful Beaches

- “Beautiful beaches with a laid-back atmosphere, family oriented, beautiful water, and boating activities.”
- “The beaches here are calmer than the east coast. It's very relaxing.”
- “Beautiful, very natural. Not commercial.”
- “The beaches are each unique. Some have a lot of shells. Some have crystal clear water.”



# AREA DESCRIPTIONS



## Family Friendly

- “Family vacation destination with plenty to see and do. Beautiful weather.”
- “We got to see a pirate ship off the beach. The kids loved it.”
- “Beautiful, family friendly, easy walking distance from resort (Sanibel Moorings), views of sunrise and sunset, great shelling.”
- “Very relaxing place with lovely beaches. Very safe place to travel with kids or alone.”



## Relaxing and Peaceful

- “Relaxing, good weather and good/fun shelling.”
- “Listening to the waves splash against the shore is life breathing.”
- “Generally quiet, clean and safe. Nature preserves, walkable beaches and bicycle/pedestrian paths on Sanibel Island are great assets.”
- “Relaxing, calm, variety of good restaurants, live entertainment available, great beaches for kids, unbelievable shelling, history, baseball. Fantastic!”

# OCCUPANCY BAROMETER: APRIL – JUNE RESERVATIONS

| Apr – June Reservations | Apr – June 2020 | Apr – June 2021 |
|-------------------------|-----------------|-----------------|
| Up                      | 0%              | 63%             |
| Same                    | 3%              | 24%             |
| Down                    | 97%             | 12%             |
| Not Sure                | 0%              | 1%              |

# OCCUPANCY BAROMETER: APRIL – JUNE RESERVATIONS

| July – Sept Reservations | July – Sept 2020 | July – Sept 2021 |
|--------------------------|------------------|------------------|
| Up                       | 1%               | 44%              |
| Same                     | 15%              | 36%              |
| Down                     | 68%              | 17%              |
| Not Sure                 | 16%              | 3%               |

# Year-Over-Year Comparisons



# ECONOMIC IMPACT

| Visitor & Lodging Statistics | Jan – Mar 2019  | Jan – Mar 2020  | Jan – Mar 2021  | % Change |
|------------------------------|-----------------|-----------------|-----------------|----------|
| Visitors                     | 1,311,900       | 1,091,300       | 913,800         | -16.3%   |
| Room Nights                  | 1,848,200       | 1,599,300       | 1,554,500       | -2.8%    |
| Direct Expenditures          | \$1,251,828,600 | \$1,082,785,200 | \$1,006,613,000 | -7.0%    |
| Total Economic Impact        | \$2,032,969,600 | \$1,758,443,200 | \$1,604,541,100 | -8.8%    |
| Occupancy                    | 86.3%           | 78.2%           | 78.8%           | +0.8%    |
| ADR                          | \$213.96        | \$196.19        | \$181.23        | -7.6%    |
| RevPAR                       | \$184.65        | \$153.42        | \$142.81        | -6.9%    |

# JOBS, WAGES AND TAXES SUPPORTED BY TOURISM

|                    | Jan – Mar 2019 | Jan – Mar 2020 | Jan – Mar 2021 | % Change<br>'20-'21 |
|--------------------|----------------|----------------|----------------|---------------------|
| Direct Jobs        | 16,851         | 14,551         | 13,530         | -7.0%               |
| Total Jobs         | 23,423         | 20,350         | 18,571         | -8.7%               |
| Direct Wages       | \$391,224,900  | \$326,417,300  | \$303,066,300  | -7.2%               |
| Total Wages        | \$639,734,400  | \$545,326,600  | \$497,704,900  | -8.7%               |
| Direct Local Taxes | \$41,435,500   | \$33,024,900   | \$30,701,700   | -7.0%               |
| Total Local Taxes  | \$71,763,800   | \$59,435,400   | \$54,233,500   | -8.8%               |
| Direct State Taxes | \$89,005,000   | \$76,986,000   | \$71,570,200   | -7.0%               |
| Total State Taxes  | \$133,769,400  | \$115,178,000  | \$105,097,400  | -8.8%               |

# VISITOR TYPE

| Visitor Type                        | Jan – Mar 2020 | Jan – Mar 2021 |
|-------------------------------------|----------------|----------------|
| Visitors in Paid Accommodations     | 65%            | 69%            |
| Visitors in Non-Paid Accommodations | 32%            | 29%            |
| Day Trippers                        | 3%             | 2%             |

# PRE-VISIT

| Planned trip in advance | Jan – Mar 2020 | Jan – Mar 2021 |
|-------------------------|----------------|----------------|
| 1 week or less          | 5%             | 5%             |
| 2-4 weeks               | 8%             | 17%            |
| 1-2 months              | 21%            | 29%            |
| 3-6 months              | 30%            | 24%            |
| 6 months or more        | 32%            | 23%            |
| Not sure                | 3%             | 2%             |

| Considered Other Destinations | Jan – Mar 2020 | Jan – Mar 2021 |
|-------------------------------|----------------|----------------|
| Yes                           | 16%            | 21%            |
| No                            | 84%            | 79%            |



# PRE-VISIT

| Trip Planning Websites/Apps <sup>1</sup>     | Jan – Mar 2020 | Jan – Mar 2021 |
|--|----------------|----------------|
| Airline websites                             | 28%            | 28%            |
| Search engines                               | 20%            | 27%            |
| Airbnb, VRBO, HomeAway, or similar website   | 16%            | 27%            |
| Vacation rental websites                     | 14%            | 21%            |
| Hotel websites                               | 19%            | 18%            |
| Booking websites                             | 15%            | 18%            |
| Trip Advisor                                 | 17%            | 17%            |
| Travel reviews, blogs, stories, etc.         | 7%             | 11%            |
| www.FortMyers-Sanibel.com                    | 9%             | 10%            |
| Visit Florida                                | 9%             | 9%             |
| Facebook                                     | 9%             | 8%             |
| Beaches of Fort Myers & Sanibel Social Media | 6%             | 8%             |
| TV or radio streaming                        | 5%             | 6%             |
| Instagram                                    | 5%             | 5%             |
| None/Don't visit websites                    | 19%            | 17%            |
| Other  | 5%             | 5%             |

# PRE-VISIT

| Information Requests <sup>1</sup> | Jan – Mar 2020 | Jan – Mar 2021 |
|-----------------------------------|----------------|----------------|
| Call hotel/motel/condo            | 18%            | 26%            |
| Visitor guide                     | 11%            | 16%            |
| Call VCB                          | 7%             | 12%            |
| Fort Myers-Sanibel E-newsletter   | 8%             | 11%            |
| Call local Chamber of Commerce    | 6%             | 11%            |
| None/Did not request info         | 67%            | 58%            |
| Other                             | 4%             | 4%             |

<sup>1</sup>Multiple responses permitted.

# PRE-VISIT

| Recall of Lee County Promotions | Jan – Mar 2020 | Jan – Mar 2021 |
|---------------------------------|----------------|----------------|
| Yes                             | 40%            | 35%            |
| No                              | 48%            | 52%            |
| Can't recall                    | 12%            | 13%            |

| Characteristics influencing visit to Lee County (top 2 boxes) | Jan – Mar 2020 | Jan – Mar 2021 |
|---|----------------|----------------|
| Warm weather  | 93%            | 95%            |
| Peaceful/relaxing   | 87%            | 91%            |
| A safe destination  | 83%            | 86%            |
| White sandy beaches   | 81%            | 86%            |
| Clean, unspoiled environment                                  | 81%            | 84%            |
| Convenient location   | 78%            | 79%            |
| Plenty to see and do  | 76%            | 79%            |
| A "family" atmosphere   | 67%            | 74%            |
| Value for your travel dollar                                  | 69%            | 70%            |
| Reasonably priced lodging                                     | 63%            | 67%            |

# PRE-VISIT

| Transportation           | Jan – Mar 2020 | Jan – Mar 2021 |
|--------------------------|----------------|----------------|
| Fly                      | 70%            | 74%            |
| Drive a personal vehicle | 25%            | 21%            |
| Drive a rental vehicle   | 2%             | 3%             |
| Drive a RV               | 1%             | 1%             |
| Travel by bus            | 1%             | 0%             |
| Other                    | 1%             | 0%             |

| Airport Used                    | Jan – Mar 2020 | Jan – Mar 2021 |
|---------------------------------|----------------|----------------|
| Southwest Florida International | 80%            | 76%            |
| Punta Gorda                     | 7%             | 15%            |
| Miami International             | 4%             | 2%             |
| Ft. Lauderdale international    | 3%             | 2%             |
| Tampa International             | 3%             | 2%             |
| Orlando International           | 2%             | 2%             |
| Other                           | 1%             | 1%             |

# TRAVEL PARTY PROFILE

| Visitor Origin      | Jan – Mar 2020 | Jan – Mar 2021 |
|---------------------|----------------|----------------|
| Florida             | 4%             | 4%             |
| Southeast           | 12%            | 19%            |
| Northeast           | 24%            | 15%            |
| Midwest             | 47%            | 51%            |
| West                | 4%             | 7%             |
| Canada              | 5%             | 2%             |
| United Kingdom      | 1%             | 0%             |
| Germany             | 1%             | 0.5%           |
| Other Europe        | 1%             | 0.5%           |
| Other international | 1%             | 1%             |

| Visitor Origin       | Jan – Mar 2020 | Jan – Mar 2021 |
|----------------------|----------------|----------------|
| Minneapolis-St. Paul | 7%             | 8%             |
| Chicago              | 3%             | 8%             |
| New York City        | 5%             | 6%             |
| Columbus             | 1%             | 6%             |
| Cleveland-Akron      | 2%             | 5%             |
| Detroit              | 4%             | 5%             |
| Indianapolis         | 3%             | 5%             |

# TRAVEL PARTY PROFILE

| Travel Parties                    | Jan – Mar 2020   | Jan – Mar 2021   |
|-----------------------------------|------------------|------------------|
| Mean travel party size            | 3.1 <sup>1</sup> | 3.6 <sup>1</sup> |
| Travel with children under age 18 | 22%              | 35%              |

| Travel Party Composition | Jan – Mar 2020 | Jan – Mar 2021 |
|--------------------------|----------------|----------------|
| Family                   | 27%            | 41%            |
| Couple                   | 48%            | 38%            |
| Group of couples/friends | 10%            | 12%            |
| Single                   | 11%            | 7%             |
| In a tour group          | 2%             | 1%             |
| With business associates | 2%             | 1%             |

<sup>1</sup>Source: Visitor Tracking Survey, includes all types of visitors

# TRAVEL PARTY PROFILE

| Marital Status | Jan – Mar 2020 | Jan – Mar 2021 |
|----------------|----------------|----------------|
| Married        | 74%            | 77%            |
| Single         | 21%            | 20%            |
| Other          | 5%             | 3%             |

| Age         | Jan – Mar 2020 | Jan – Mar 2021 |
|-------------|----------------|----------------|
| Average age | 53             | 50             |

| Household Income | Jan – Mar 2020 | Jan – Mar 2021 |
|------------------|----------------|----------------|
| Median Income    | \$118,300      | \$96,900       |

# TRIP EXPERIENCE

| Length of Stay  | Jan – Mar 2020    | Jan – Mar 2021   |
|---|-------------------|------------------|
| Average nights in The Beaches of Fort Myers & Sanibel | 10.5 <sup>1</sup> | 8.9 <sup>1</sup> |

| First time/Repeat Visitors | Jan – Mar 2020 | Jan – Mar 2021 |
|----------------------------|----------------|----------------|
| First-time                 | 20%            | 27%            |
| Repeat                     | 80%            | 73%            |

<sup>1</sup>Source: Visitor Tracking Survey, includes all types of visitors



# TRIP EXPERIENCE

| Activities <sup>1</sup>            | Jan – Mar 2020 | Jan – Mar 2021 |
|------------------------------------|----------------|----------------|
| Beaches                            | 62%            | 71%            |
| Relax & unwind                     | 60%            | 64%            |
| Dining                             | 56%            | 52%            |
| Shopping                           | 35%            | 35%            |
| Visiting friends/relatives         | 34%            | 28%            |
| Nature, environment, bird watching | 25%            | 25%            |
| Biking, hiking etc.                | 17%            | 25%            |
| Water sports                       | 16%            | 25%            |
| Fishing                            | 10%            | 18%            |
| Attractions                        | 20%            | 15%            |
| Bars, nightlife                    | 17%            | 15%            |
| Golf or tennis                     | 13%            | 15%            |
| Photography                        | 12%            | 12%            |
| Guided tours                       | 8%             | 10%            |
| Culture                            | 10%            | 8%             |
| Museum, history, etc.              | 10%            | 8%             |
| Sporting event                     | 11%            | 7%             |
| Diving/snorkeling                  | 3%             | 6%             |
| Special event                      | 7%             | 5%             |
| Spas                               | 4%             | 5%             |
| Special occasion                   | 4%             | 4%             |
| Business conference or meeting     | 3%             | 3%             |
| Volunteering                       | 2%             | 3%             |
| Other                              | 4%             | 3%             |

<sup>1</sup>Multiple responses permitted.

# TRIP EXPERIENCE

| Attractions <sup>1</sup>                   | Jan – Mar 2020 | Jan – Mar 2021 |
|--|----------------|----------------|
| Beaches                                    | 60%            | 71%            |
| Sanibel Lighthouse                         | 27%            | 32%            |
| Fort Myers Beach Pier                      | 35%            | 29%            |
| Sanibel Outlets                            | 17%            | 19%            |
| J.N. Ding Darling National Wildlife Refuge | 17%            | 18%            |
| Edison & Ford Winter Estates               | 20%            | 16%            |
| Periwinkle Place                           | 12%            | 15%            |
| Miramar Outlets Mall                       | 17%            | 12%            |
| Shell Factory and Nature Park              | 9%             | 11%            |
| Bell Tower Shops                           | 9%             | 10%            |
| Gulf Coast Town Center                     | 7%             | 10%            |
| Coconut Point Mall                         | 10%            | 9%             |
| Manatee Park                               | 10%            | 8%             |
| Bailey-Matthews Shell Museum               | 5%             | 7%             |
| Barbara B. Mann Performing Arts Hall       | 5%             | 3%             |
| Broadway Palm Dinner Theater               | 6%             | 2%             |
| Other                                      | 6%             | 5%             |
| None                                       | 7%             | 5%             |

<sup>1</sup>Multiple responses permitted.

# TRIP EXPERIENCE

| Area stayed                | Jan – Mar 2020 | Jan – Mar 2021 |
|----------------------------|----------------|----------------|
| Sanibel Island             | 21%            | 28%            |
| Fort Myers Beach           | 21%            | 22%            |
| Fort Myers                 | 18%            | 17%            |
| Cape Coral                 | 16%            | 15%            |
| Bonita Springs             | 6%             | 5%             |
| Captiva Island             | 2%             | 3%             |
| Estero                     | 5%             | 2%             |
| North Fort Myers           | 3%             | 2%             |
| Along I-75                 | 2%             | 1%             |
| Lehigh Acres               | 1%             | 1%             |
| Pine Island                | 1%             | 1%             |
| Boca Grande/Outer Island   | 1%             | 1%             |
| None/not staying overnight | 3%             | 2%             |

# POST-TRIP EVALUATION

| Loyalty metrics            | Jan – Mar 2020 | Jan – Mar 2021 |
|----------------------------|----------------|----------------|
| Likely to recommend        | 95%            | 95%            |
| Likely to return           | 94%            | 91%            |
| Likely to return next year | 74%            | 58%            |

| Satisfaction with Accommodations | Jan – Mar 2020 | Jan – Mar 2021 |
|----------------------------------|----------------|----------------|
| Exceeded expectations            | 34%            | 45%            |
| Met expectations                 | 63%            | 52%            |
| Did not meet expectations        | 3%             | 3%             |

# POST-TRIP EVALUATION

| Satisfaction with Visit        | Jan – Mar 2020 | Jan – Mar 2021 |
|--------------------------------|----------------|----------------|
| Very satisfied                 | 69%            | 73%            |
| Satisfied                      | 28%            | 23%            |
| Neither                        | 1%             | 2%             |
| Dissatisfied/Very dissatisfied | 1%             | 1%             |
| Don't know                     | 1%             | 1%             |

| Satisfaction with Customer Service | Jan – Mar 2020 | Jan – Mar 2021 |
|------------------------------------|----------------|----------------|
| Very satisfied                     | 62%            | 69%            |
| Satisfied                          | 31%            | 25%            |
| Neither                            | 3%             | 3%             |
| Dissatisfied/Very dissatisfied     | 1%             | 1%             |
| Don't know                         | 3%             | 2%             |

# POST-TRIP EVALUATION

| Visitor Concerns <sup>1</sup> | Jan – Mar 2020 | Jan – Mar 2021 |
|-------------------------------|----------------|----------------|
| Traffic                       | 50%            | 44%            |
| High prices                   | 15%            | 22%            |
| Red Tide                      | 8%             | 21%            |
| Insects                       | 13%            | 14%            |
| Beach seaweed                 | 9%             | 11%            |
| Water quality                 | 8%             | 11%            |
| Lack of nightlife             | 7%             | 11%            |
| Weather                       | 7%             | 9%             |
| Quality of accommodations     | 5%             | 8%             |
| Nothing                       | 25%            | 19%            |
| Other                         | 4%             | 4%             |

<sup>1</sup>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: 925 completed interviews
    - Target individuals: January – March visitors to Lee County
    - Data Collection: January 2021 – March 2021
  - Occupancy Study
    - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc., and the STR Report
    - Sample Size – data from 8,782 hotel/rental/campground units (102 properties) reporting to DSG, 10,269 hotel units reporting to STR (86 properties), and 15,892 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

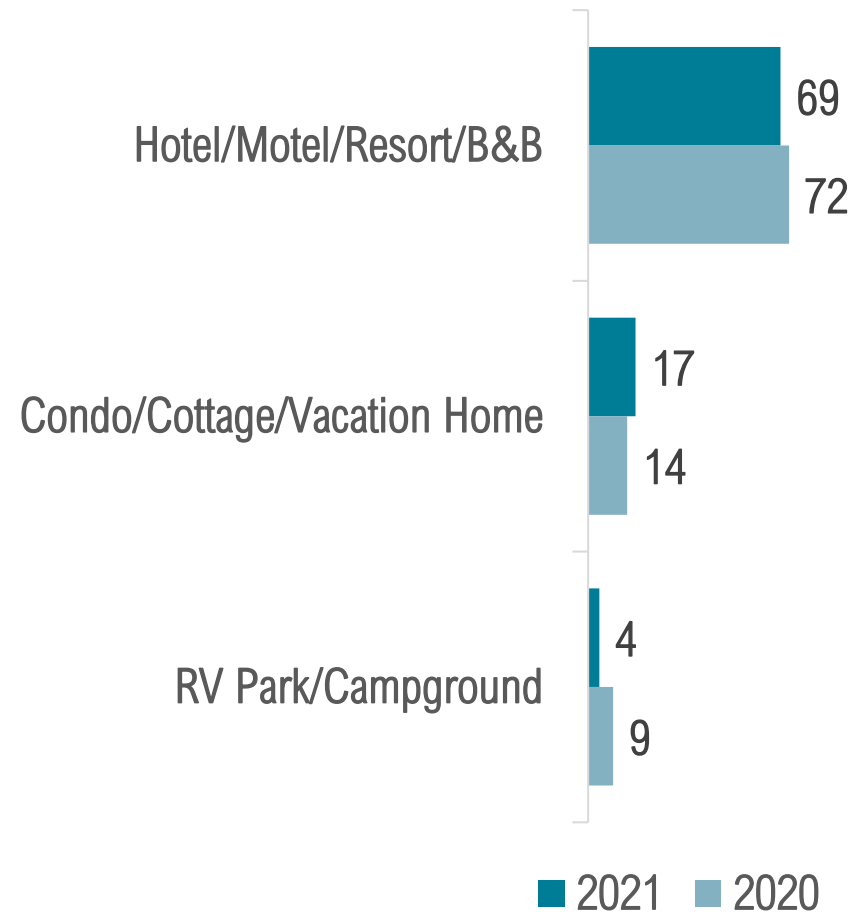


# METHODOLOGY

## • Occupancy Study

- Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc.
  - Sample Size – 90 completed interviews
  - Data Collection: January 2021 (for Jan – Mar 2021)
- Total Sample Size – data from 8,431 hotel/rental/campground units reporting to DSG, 10,400 hotel units reporting to STR (representing 87 properties), and 16,386 rental unit listings on Key Data

## Number of Interviews



# METHODOLOGY

- 925 visitor interviews were completed in the following areas:



# The Beaches of Fort Myers & Sanibel

Lee County VCB

January – March 2021

Visitor Tracking & Occupancy Study

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