

The Beaches of Fort Myers & Sanibel

Lee County VCB

Oct – Dec 2020

Visitor Tracking, Occupancy & Economic Impact Study

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Introduction



STUDY OBJECTIVES: MAP THE VISITOR JOURNEY



Executive Summary



VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION



TOURISM SNAPSHOT: OCT – DEC 2019¹

Visitor & Lodging Statistics	Oct – Dec 2019	Oct – Dec 2020	% Change
Visitors	1,249,500	1,097,800	-12.1%
Room Nights	1,456,300	1,320,900	-12.3%
Direct Expenditures ²	\$743,544,500	\$644,054,500	-13.4%
Total Economic Impact ³	\$1,207,516,300	\$1,045,944,500	-13.4%

¹ The levels of decreases from 2019 to 2020 were relatively high due to COVID-19.

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.

Tourism Snapshot: Calendar Year-to-Date 2020

Visitor & Lodging Statistics	CYTD 2019	CYTD 2020	% Change
Visitors	4,926,400	3,391,700	-31.2% ¹
Room Nights	5,638,700	4,413,800	-21.7% ¹
Direct Expenditures ²	\$3,272,030,100	\$2,631,887,000	-19.6% ¹
Total Economic Impact ³	\$5,313,776,600	\$4,274,184,500	-19.6%

¹ 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, plus compared to 2019 travel party size was larger and length of stay shorter in 2020.

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.

Oct – Dec Lodging Statistics

57.2%

Occupancy

↓ 9.4%

\$138.82

ADR

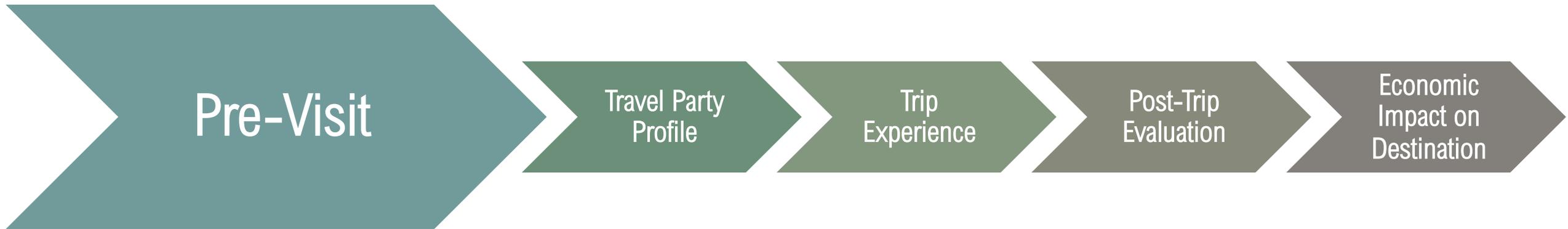
↑ 1.0%

\$79.41

RevPAR

↓ 8.4%

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**
- Almost **half** of visitors **requested information** from hotels, the VCB, etc., to plan their trips
 - **3 in 10** called a **hotel/motel/condo** when planning their trips
- **18%** of visitors considered choosing other destinations when planning their trips



TRIP PLANNING: WEBSITES/APPS USED

- Nearly 9 in 10 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 include¹:



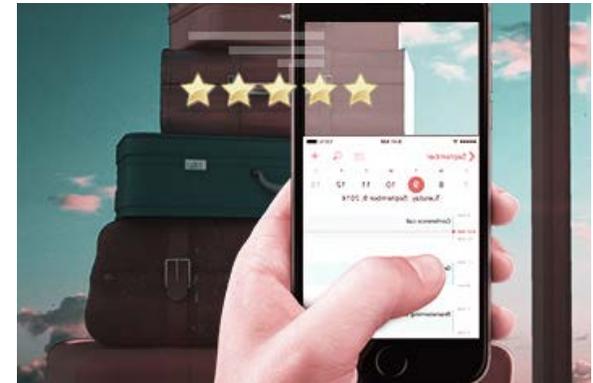
33% Airline websites/apps



27% Search engines



22% Hotel websites/apps



21% Booking websites/apps

¹Multiple responses permitted.

TOP TRIP INFLUENCERS

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



94% Peaceful/relaxing



93% Warm weather



90% Safe destination

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

TOP REASONS FOR VISITING

- Visitors' **top reasons for visiting** The Beaches of Fort Myers & Sanibel include¹:



46% Vacation



40% Beach



38% Relax & unwind



22% Visit friends & relatives

¹Three responses permitted.

PROMOTIONS

- **38%** of visitors **recalled promotions** in the past 6 months for The Beaches of Fort Myers & Sanibel
- Top sources of recall include¹:



36% Internet



36% Social media

¹Multiple responses permitted.

BOOKING

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



51% Directly with hotel



12% Other online travel agency



11% VRBO, HomeAway



11% Vacation rental company



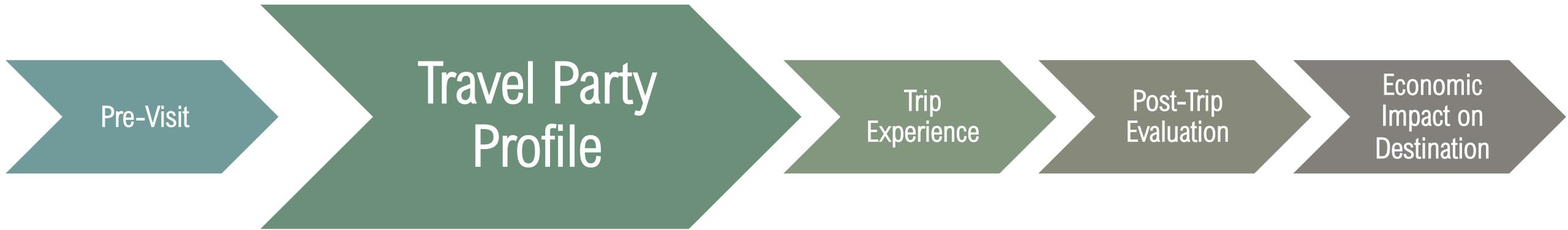
11% Airbnb

TRANSPORTATION

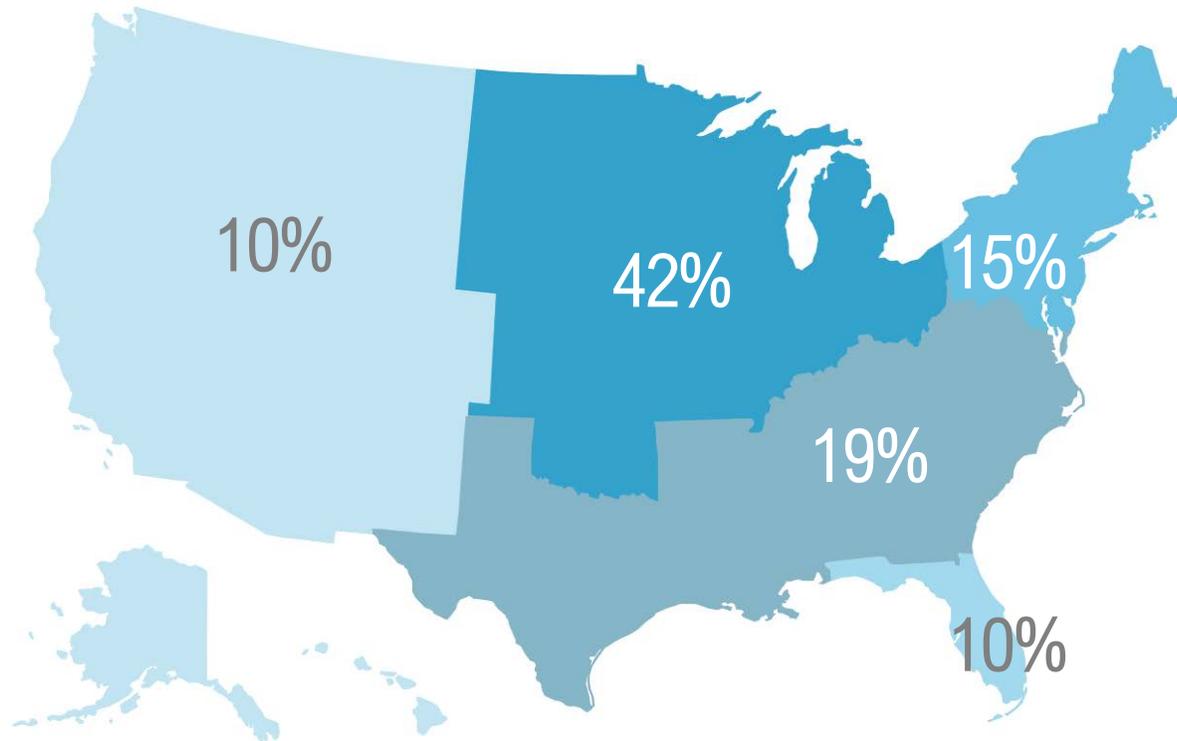


- 65% of visitors flew to The Beaches of Fort Myers & Sanibel
- 50% of all visitors traveled to Ft. Myers via RSW

VISITOR JOURNEY: TRAVEL PARTY PROFILE



ORIGIN



US = 96%



Canada

TOP ORIGIN MARKETS



5% New York City



5% Chicago



3% Indianapolis



3% Detroit



3% Washington DC-
Baltimore



3% Milwaukee

TRAVEL PARTY SIZE AND COMPOSITION

- Visitors traveled in a party composed of **3.4 people**¹
- **29%** traveled with **children** under the age of 18
- **40%** traveled as a **family**, while **36%** of visitors traveled as a **couple**



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

DEMOGRAPHIC PROFILE



Oct – Dec Visitors:

- Average age of **52 years old**
- Median household income of **\$106,000**
- Married (**74%**)
- College educated (**60%**)
- Caucasian/white (**71%**)
- Equally likely to be male or female (**50%**)

Visitor Journey: Trip Experience



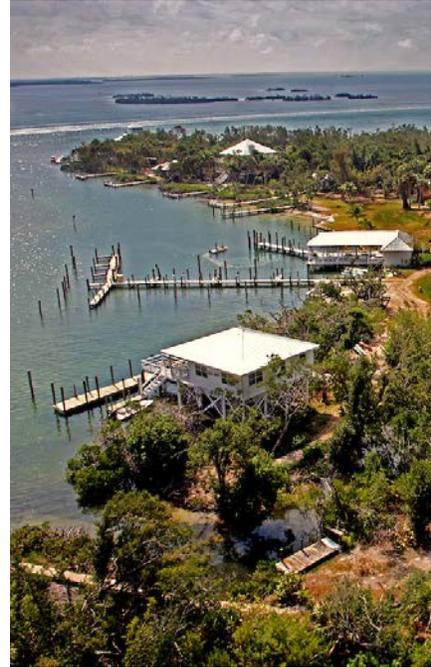
ACCOMMODATIONS



37% Condo/Vacation Rental



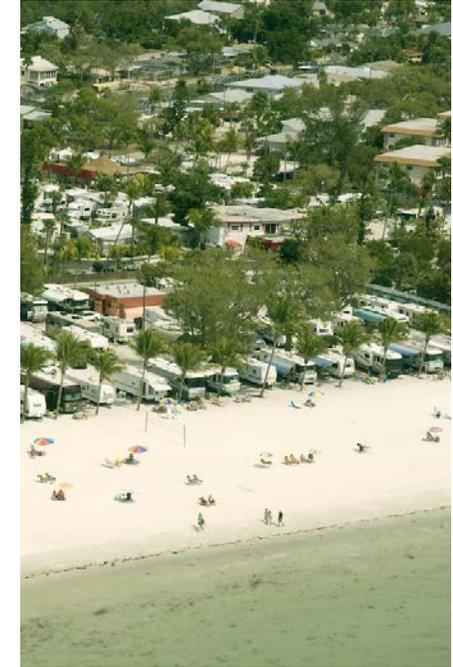
36% Hotel/Motel/Resort/B&B



22% Non-paid Accommodations



4% Day trippers



1% RV Park/Campground

LENGTH OF STAY & NUMBER OF TIMES IN DESTINATION

- Visitors¹ spent **6.6 nights** in The Beaches of Fort Myers & Sanibel
- **24%** were **first time** visitors
- **23%** have visited **more than 10 times**



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

VISITOR ACTIVITIES

- Top **visitor activities** include¹:



69% Beaches



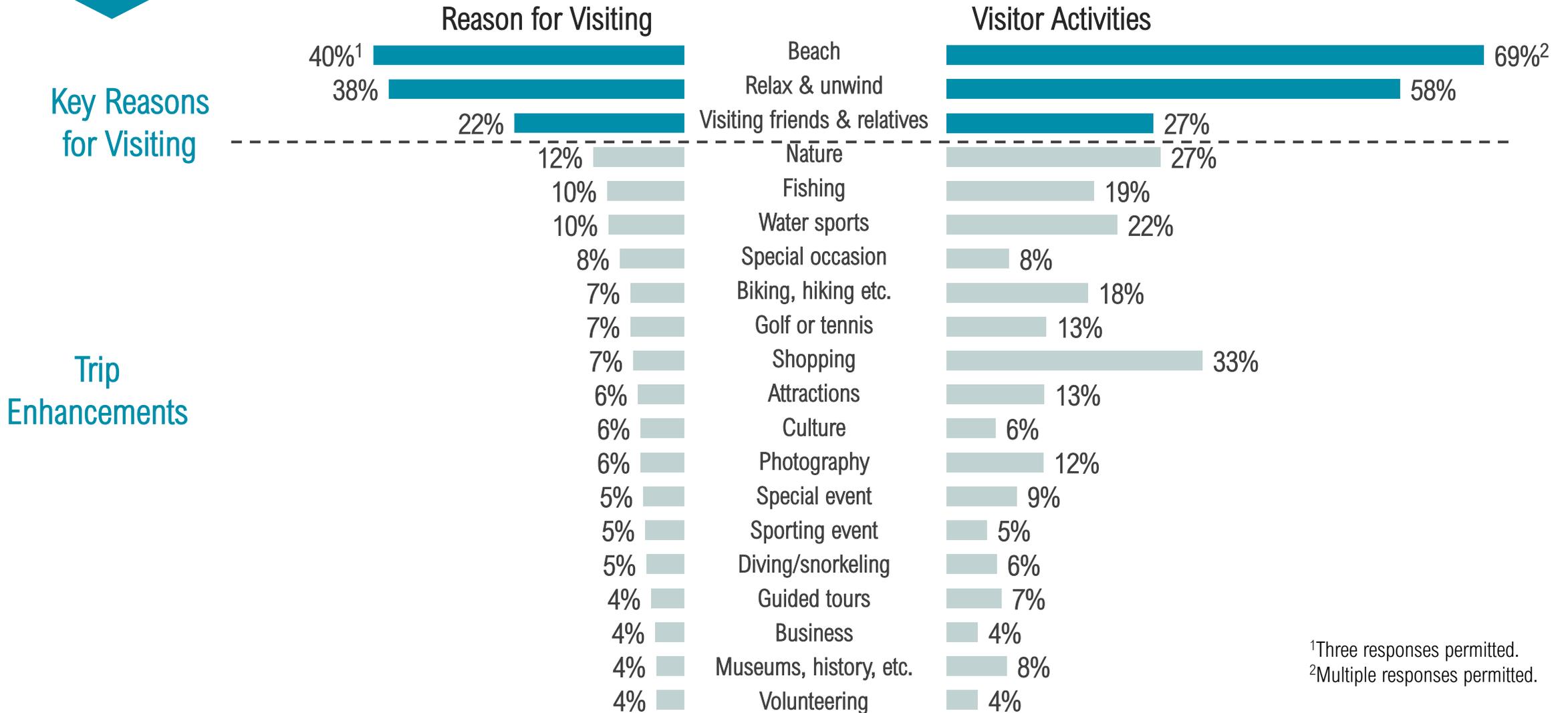
58% Relax & unwind



48% Dining

¹Multiple responses permitted.

REASON FOR VISITING VS. VISITOR ACTIVITIES



¹Three responses permitted.
²Multiple responses permitted.

TOP ATTRACTIONS VISITED¹



69% Beaches



30% Fort Myers Beach Pier



30% Sanibel Lighthouse



20% Sanibel Outlets

¹Multiple responses permitted.

TOP COMMUNITIES STAYED



23% Sanibel Island



23% Fort Myers Beach



20% Fort Myers



11% Cape Coral

VISITOR JOURNEY: POST-TRIP EVALUATION



SATISFACTION



- **93%** of visitors are **likely to recommend** The Beaches of Fort Myers & Sanibel
- **90%** of visitors are **likely to return**
- **64%** of visitors are **likely to return next year**
- **45%** of visitors said paid accommodations **exceeded their expectations**

SATISFACTION



- 97% 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

TOP ATTRIBUTE RATINGS

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



98% Peaceful/relaxing



97% Warm weather



95% White sandy beaches

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

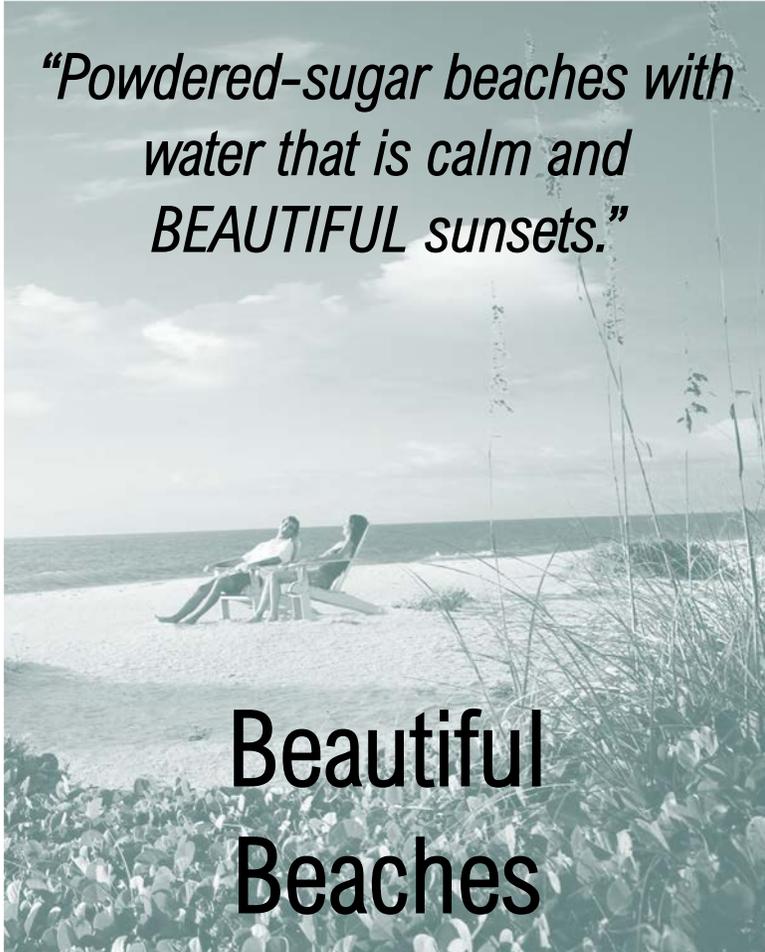
VISITOR CONCERNS

- **1 in 4** visitors was concerned about **traffic** and **insects** in The Beaches of Fort Myers & Sanibel
- **Over 1 in 5** were concerned about **high prices**
- **22%** of visitors had **no concerns** about the destination



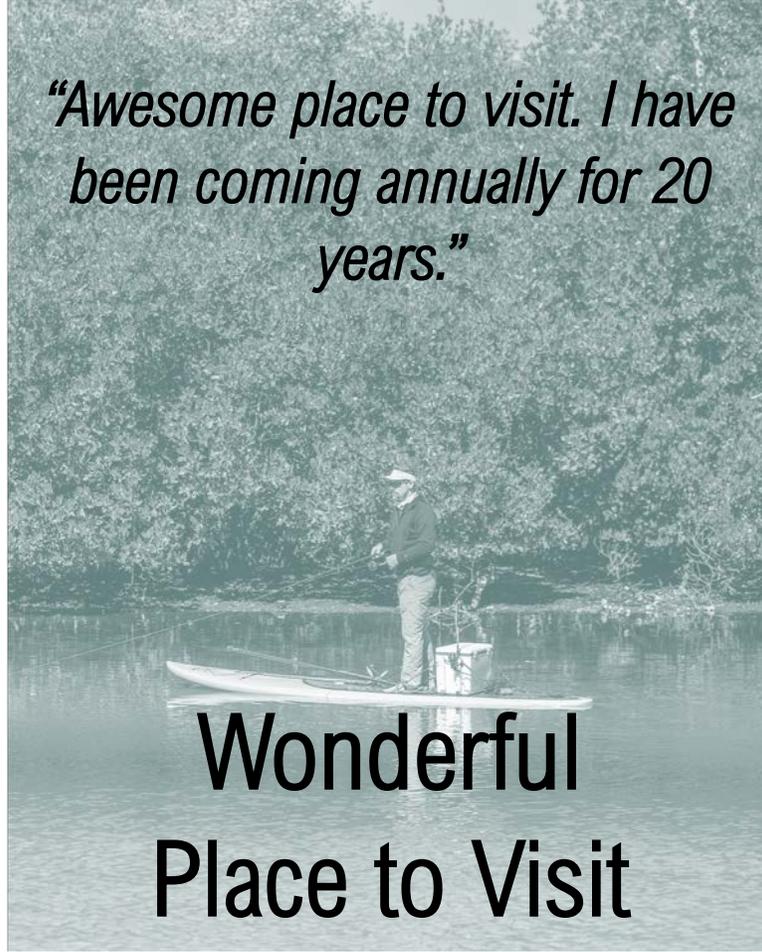
AREA DESCRIPTIONS

“Powdered-sugar beaches with water that is calm and BEAUTIFUL sunsets.”



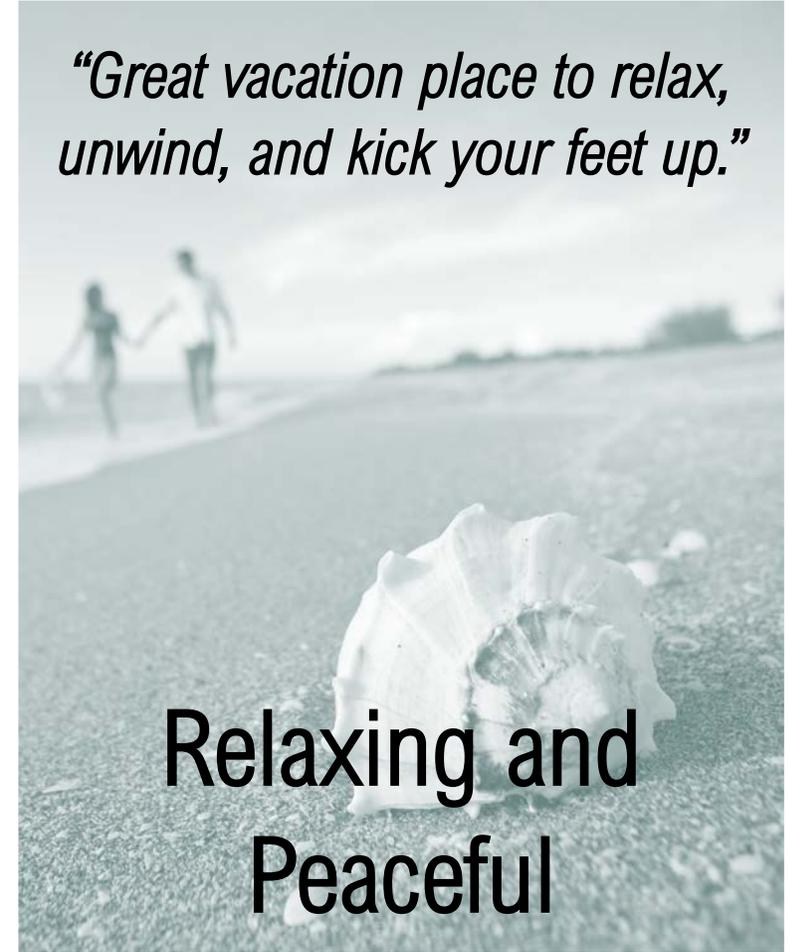
**Beautiful
Beaches**

“Awesome place to visit. I have been coming annually for 20 years.”



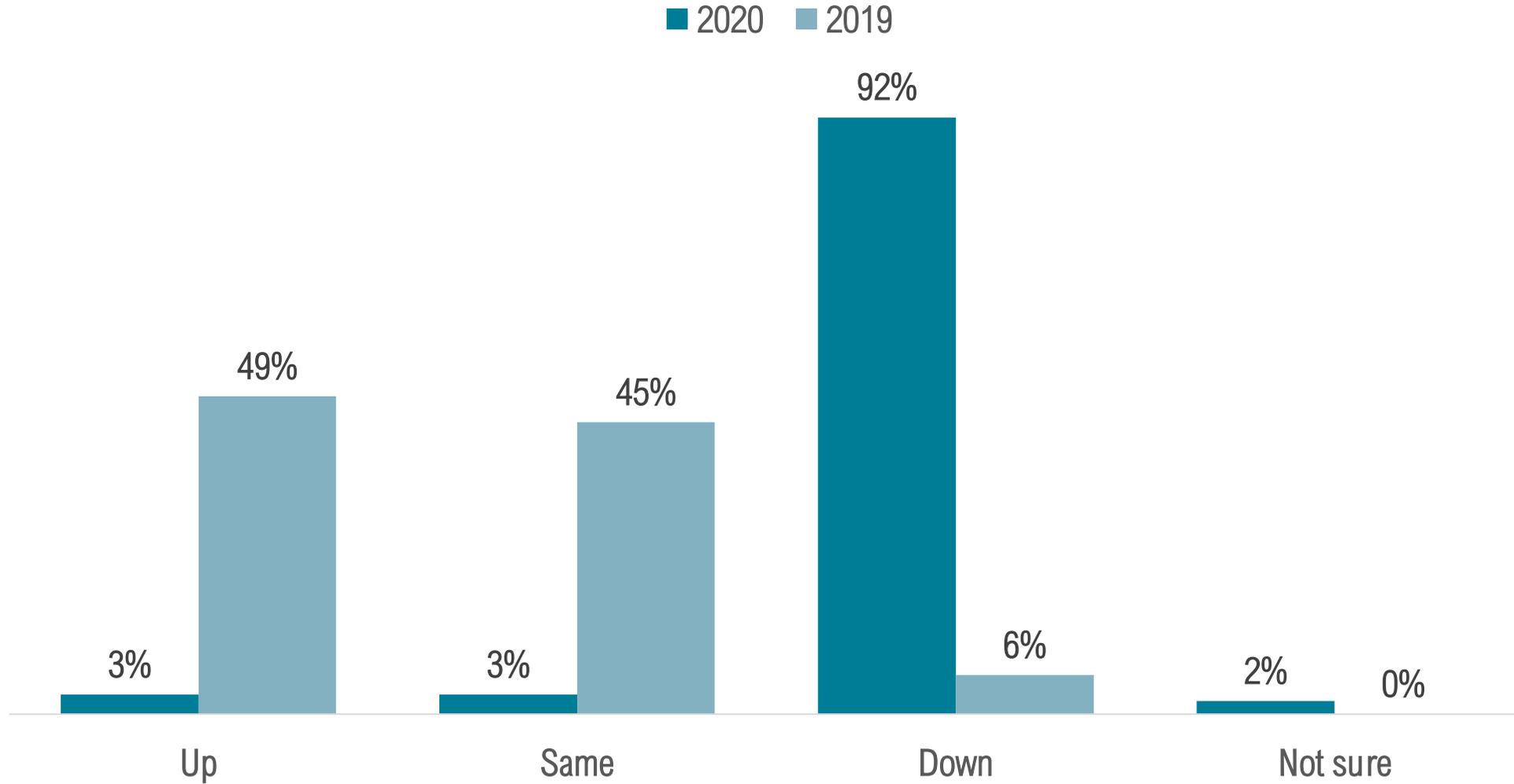
**Wonderful
Place to Visit**

“Great vacation place to relax, unwind, and kick your feet up.”

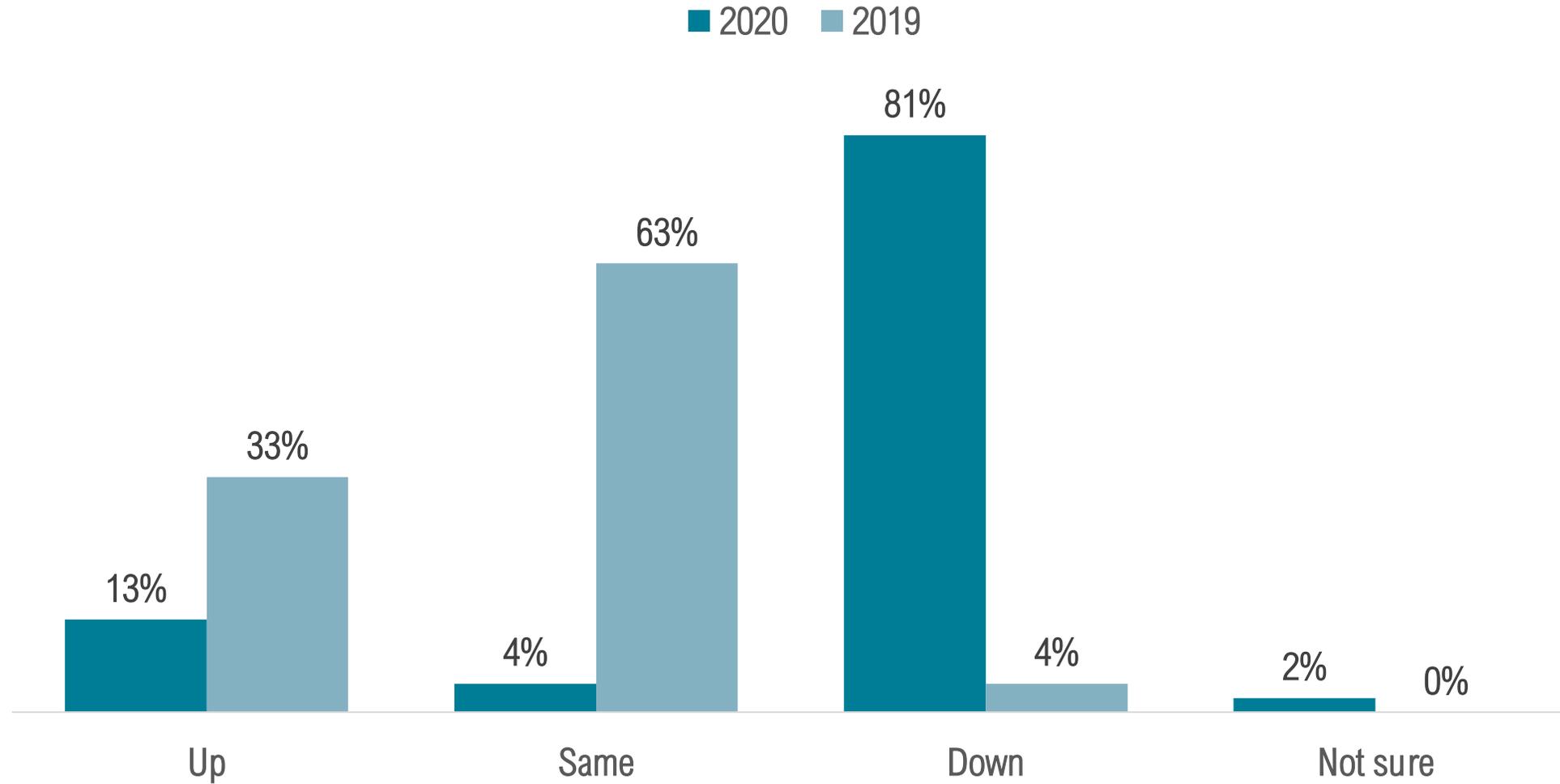


**Relaxing and
Peaceful**

OCCUPANCY BAROMETER: JANUARY – MARCH RESERVATIONS



OCCUPANCY BAROMETER: APRIL – JUNE RESERVATIONS



Detailed Findings

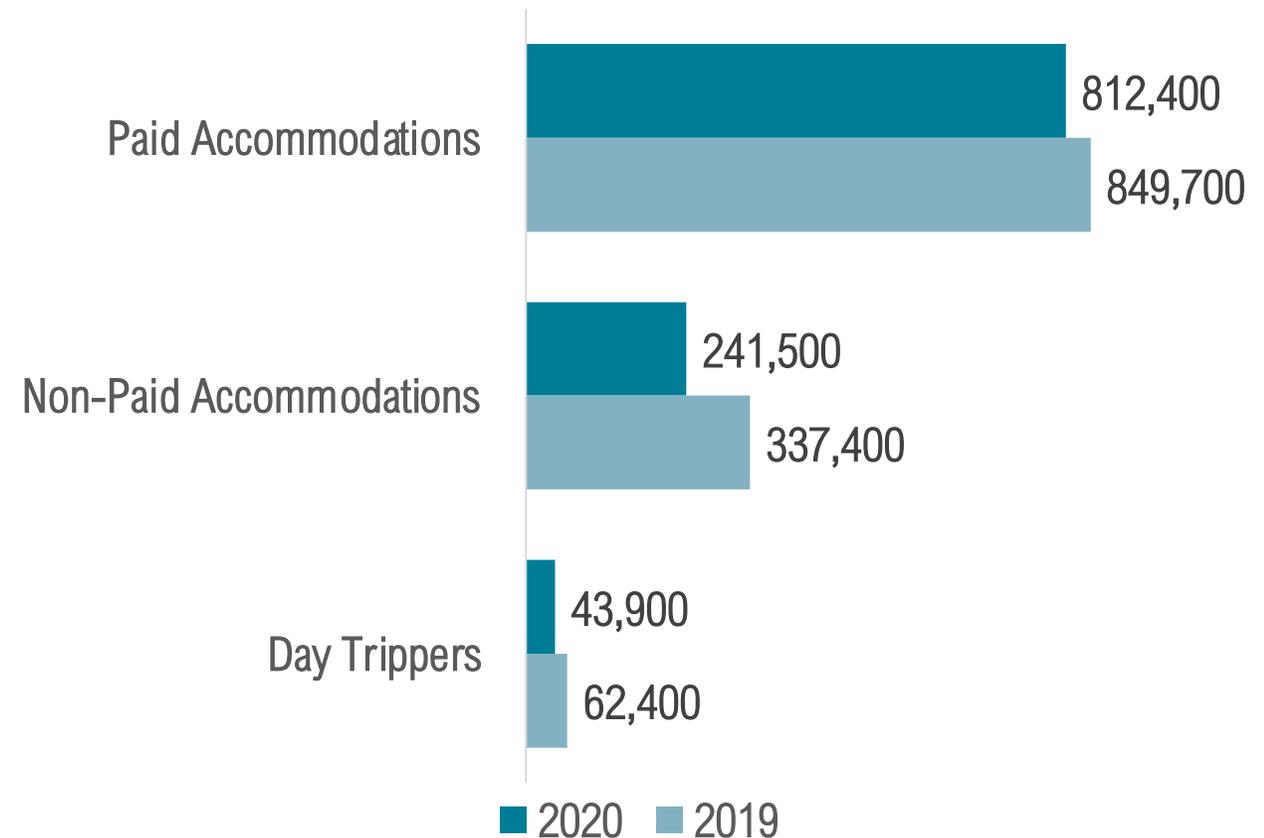


VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION



NUMBER OF VISITORS

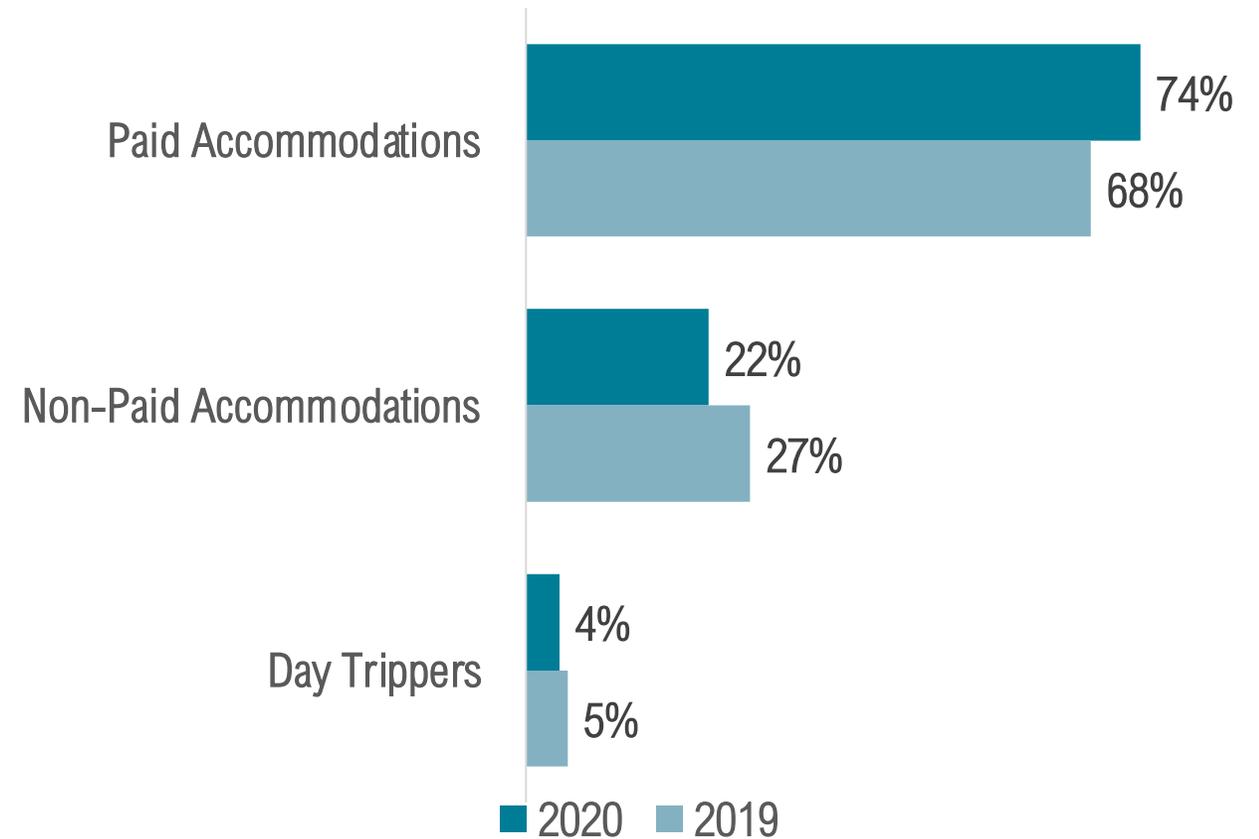
There were **1,097,800¹** visitors to The Beaches of Fort Myers & Sanibel in Oct – Dec 2020 (-12.1% from 2019).



¹Sources: Visitor Tracking Study & Occupancy Survey

VISITOR TYPE

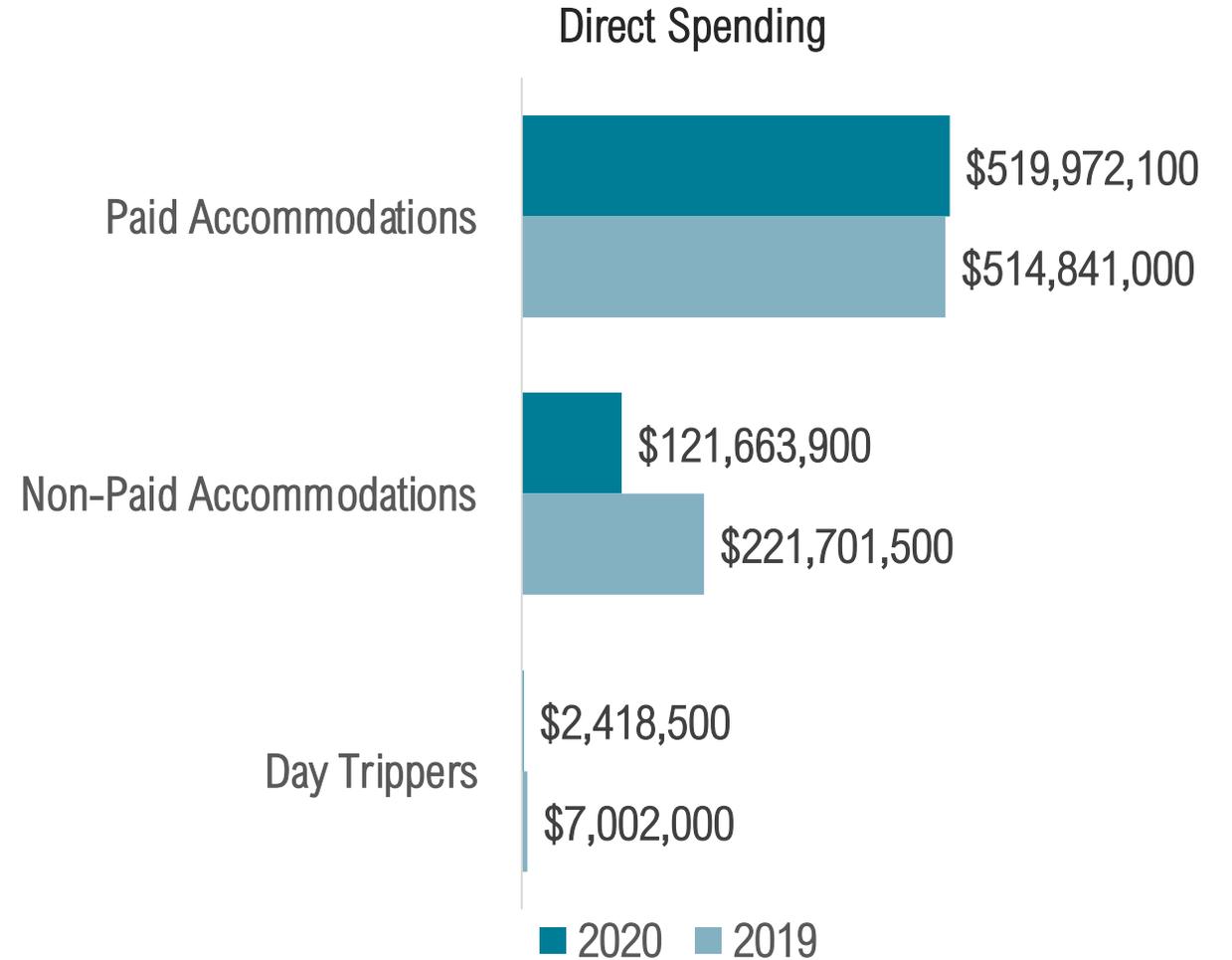
Visitors staying in paid accommodations accounted for nearly **3 in 4** visitors.



VISITOR EXPENDITURES BY VISITOR TYPE

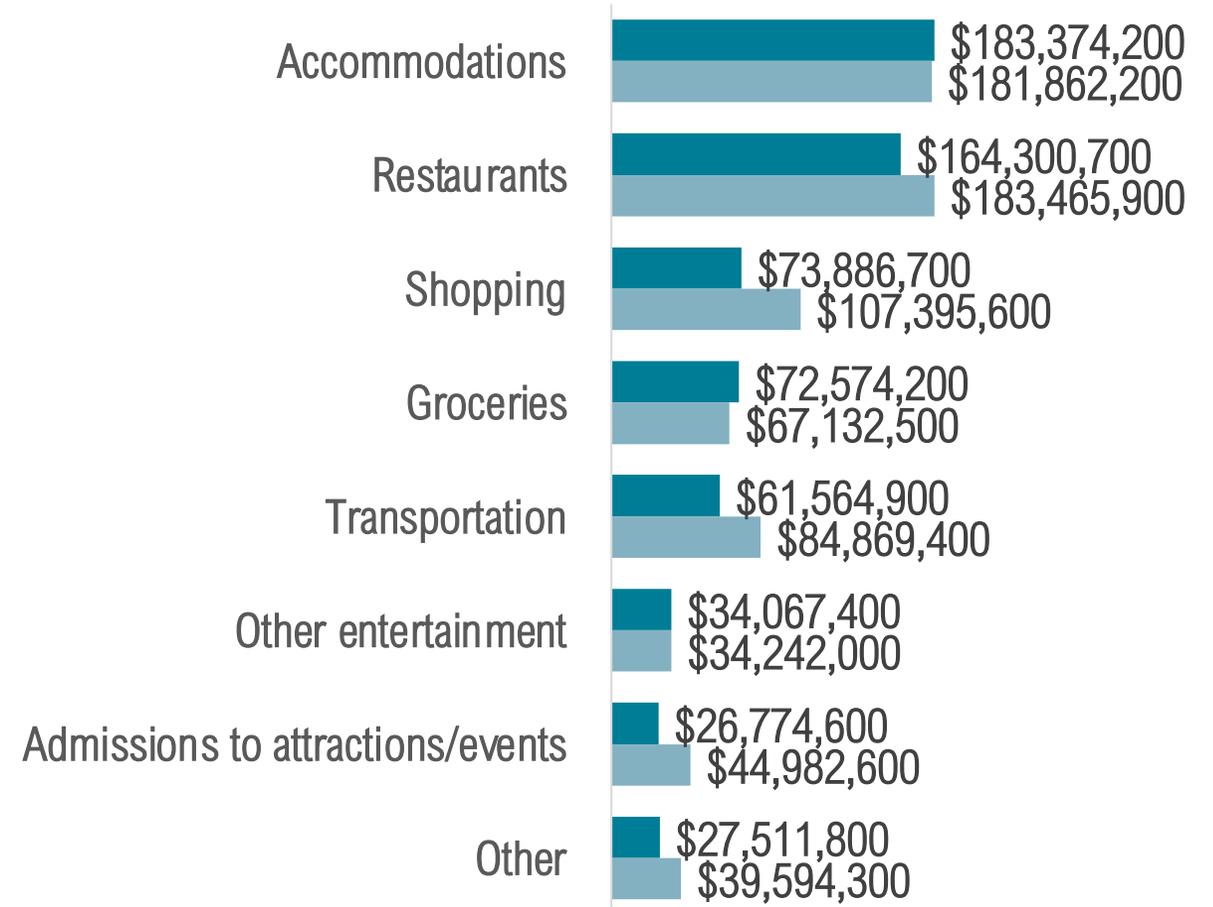


Oct – Dec visitors spent **\$644,054,500** in The Beaches of Fort Myers & Sanibel, resulting in a total economic impact of **\$1,045,944,500**, down 13.4% from 2019.



VISITOR EXPENDITURES BY SPENDING CATEGORY

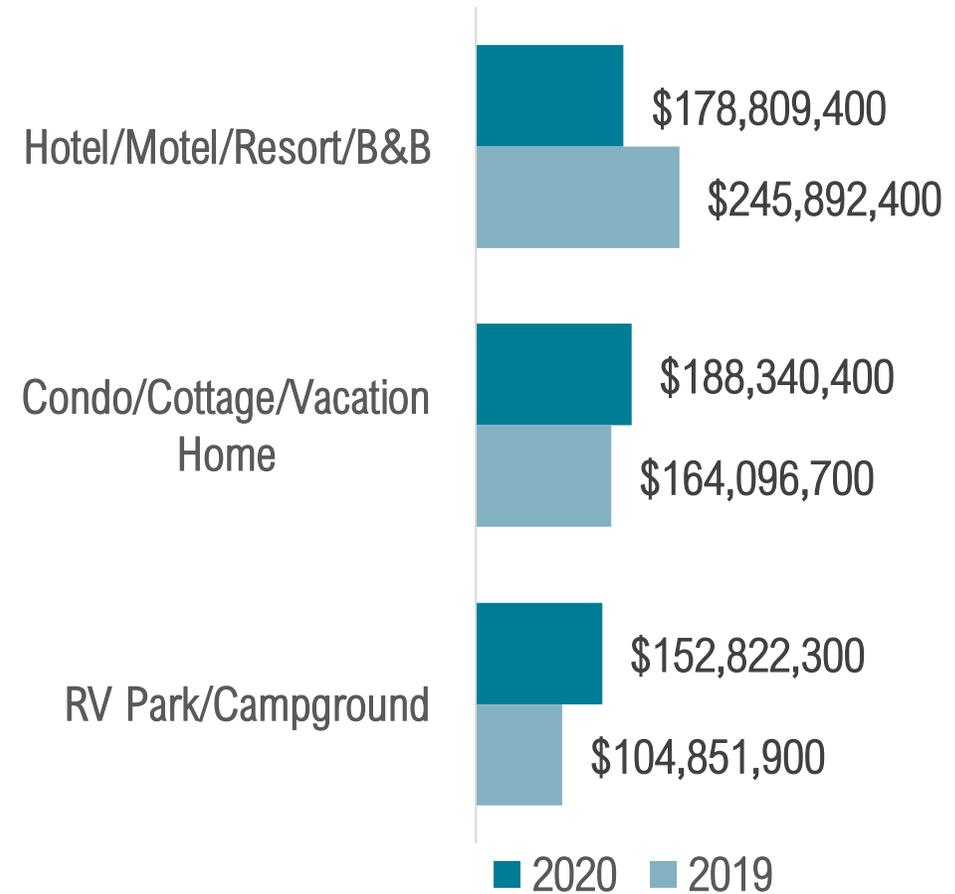
Of the **\$644,054,500** visitors spent in The Beaches of Fort Myers & Sanibel, 29% was spent on **accommodations** and 26% was spent on **restaurants**, accounting for **55% of all visitor spending**.



■ 2020 ■ 2019

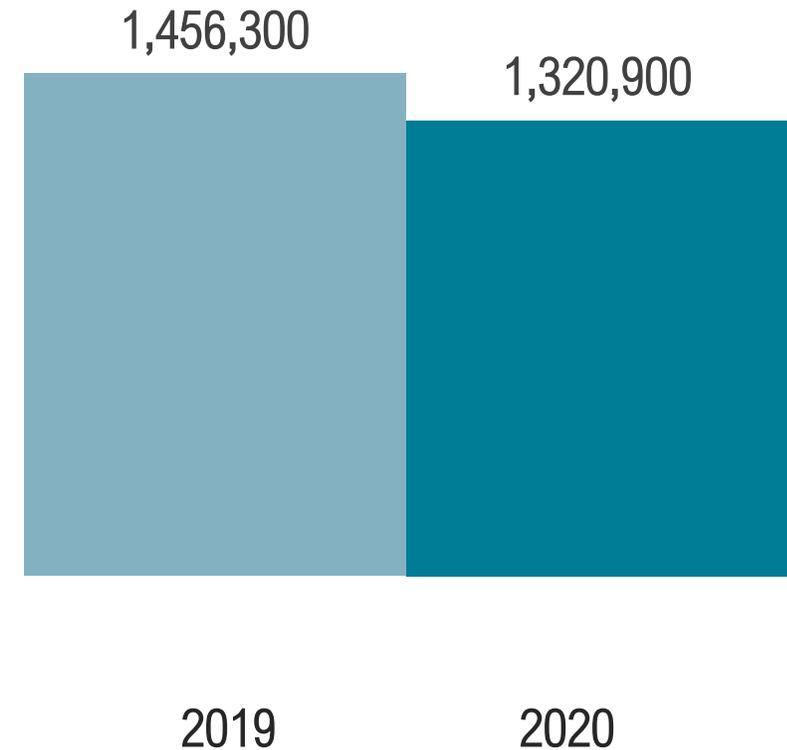
VISITOR EXPENDITURES BY LODGING TYPE

Oct – Dec visitors staying in paid accommodations spent **\$519,972,100** in The Beaches of Fort Myers & Sanibel.



ROOM NIGHTS GENERATED

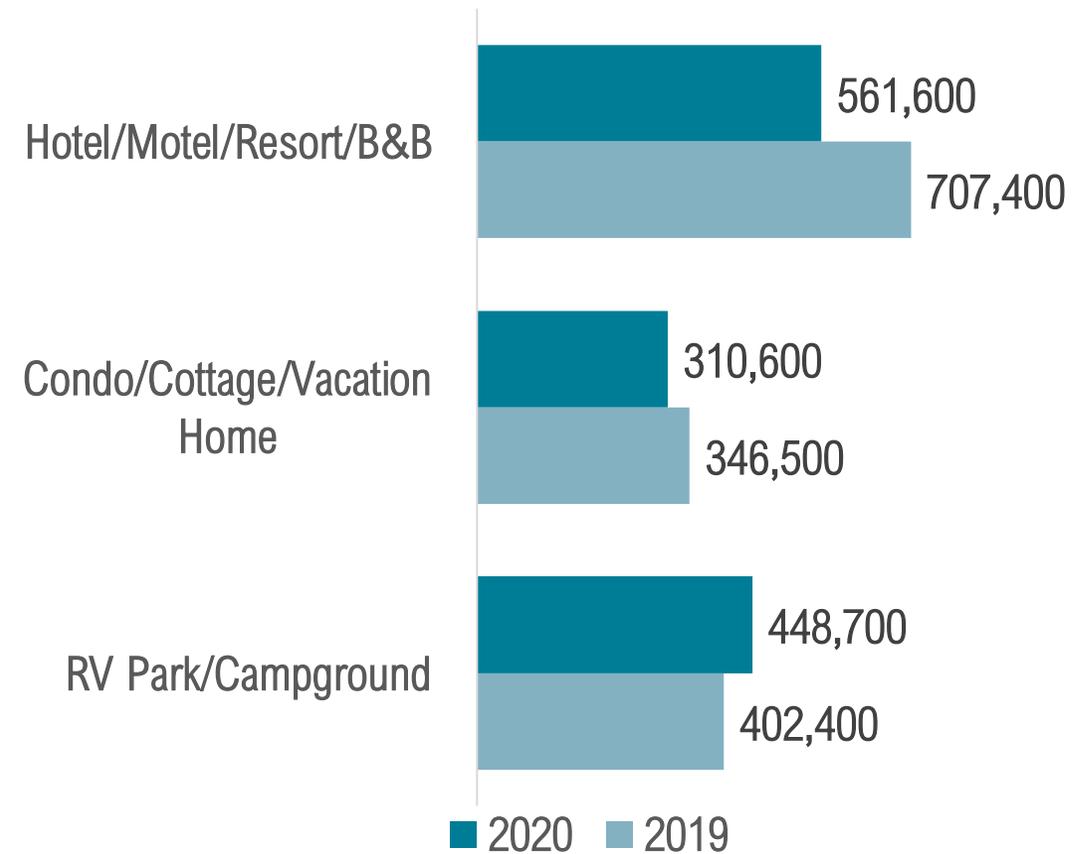
Oct – Dec visitors spent **1,320,900¹** nights in The Beaches of Fort Myers & Sanibel hotels, resorts, condos, rental houses, etc. (-12.3% from 2019).



¹Source: Occupancy Survey

ROOM NIGHTS GENERATED

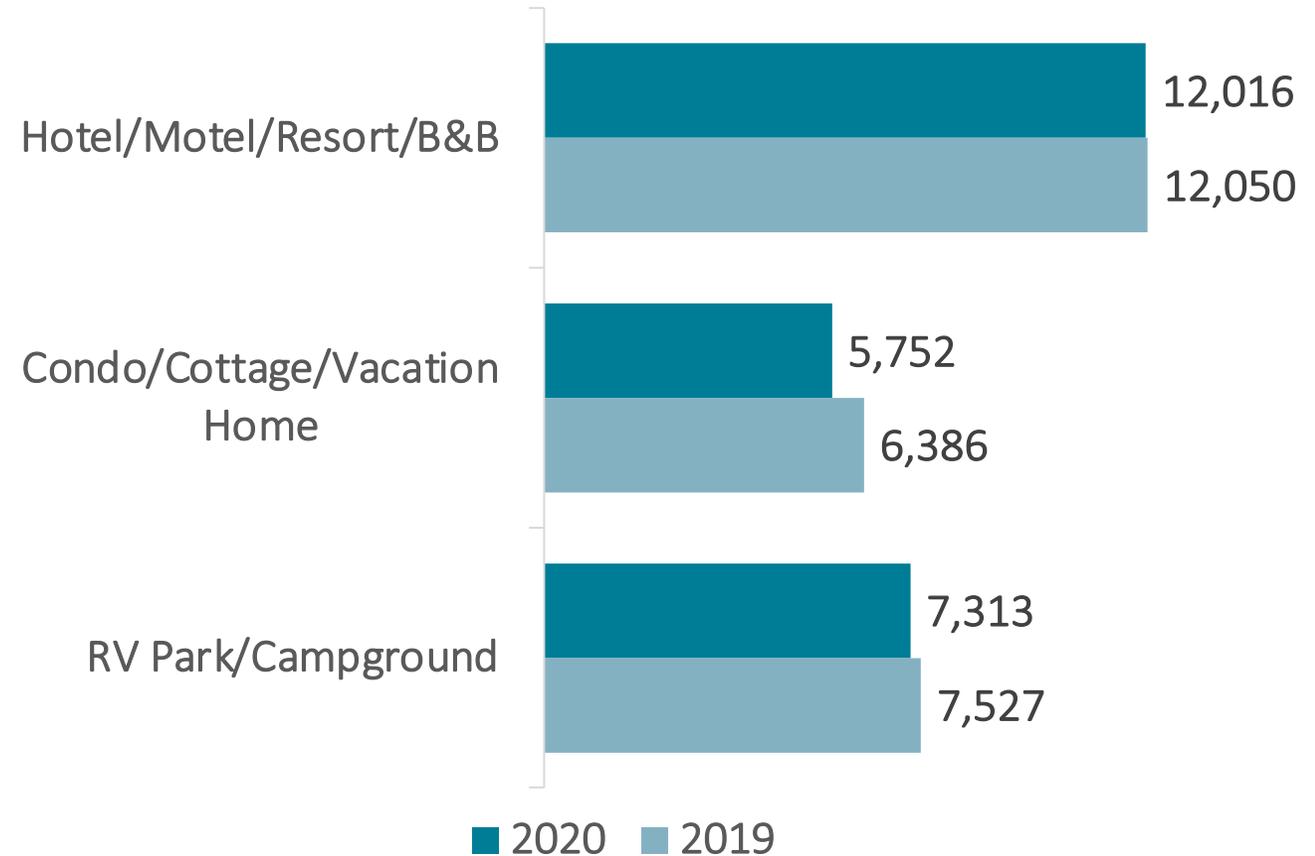
Motels, hotels, etc. accounted for over **2 in 5** nights in The Beaches of Fort Myers & Sanibel, while vacation rentals accounted for nearly **1 in 4** nights visitors spent in the area.



¹Source: Occupancy Survey

AVAILABLE UNITS

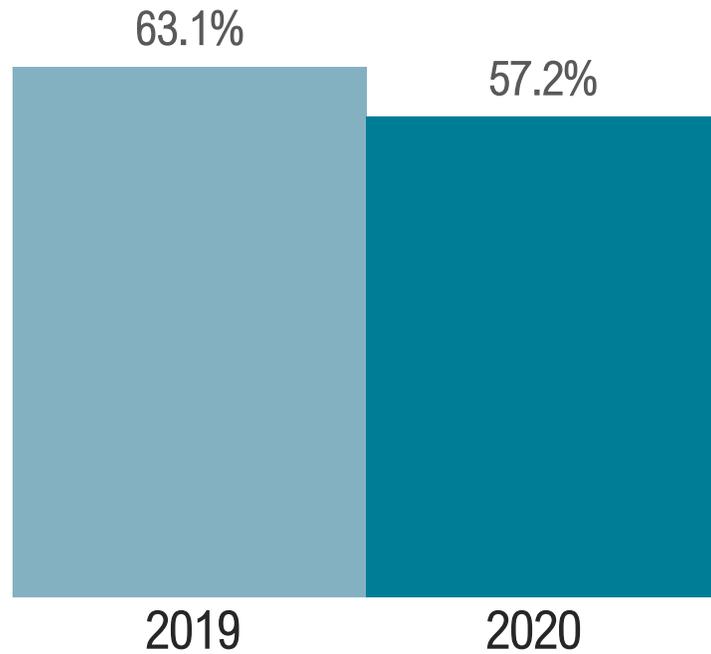
There were **25,080¹** available units in Oct – Dec, 2020 vs. 25,963 in 2019 (-3.2%). Nearly half of the units were hotels, motels, etc.



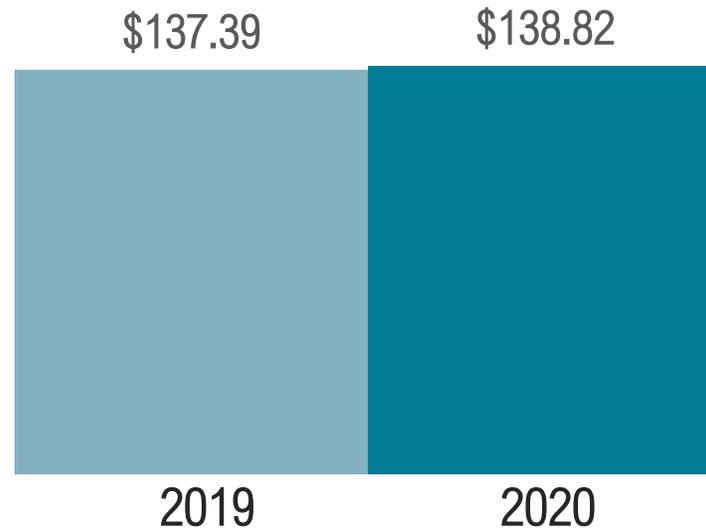
¹Source: Occupancy Survey

OCCUPANCY, ADR AND REVPAR

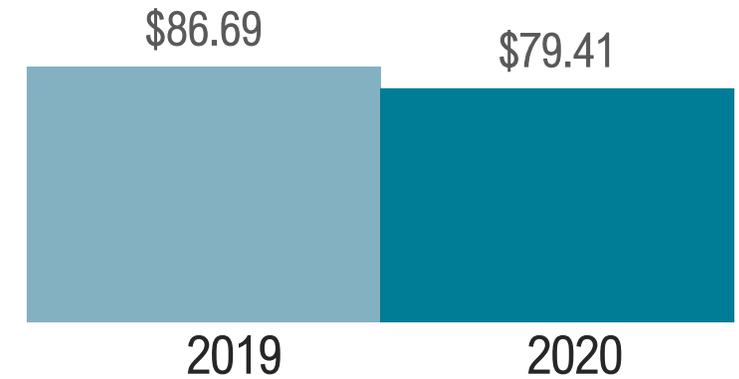
Occupancy (-9.4%)¹



ADR (+1.0%)¹



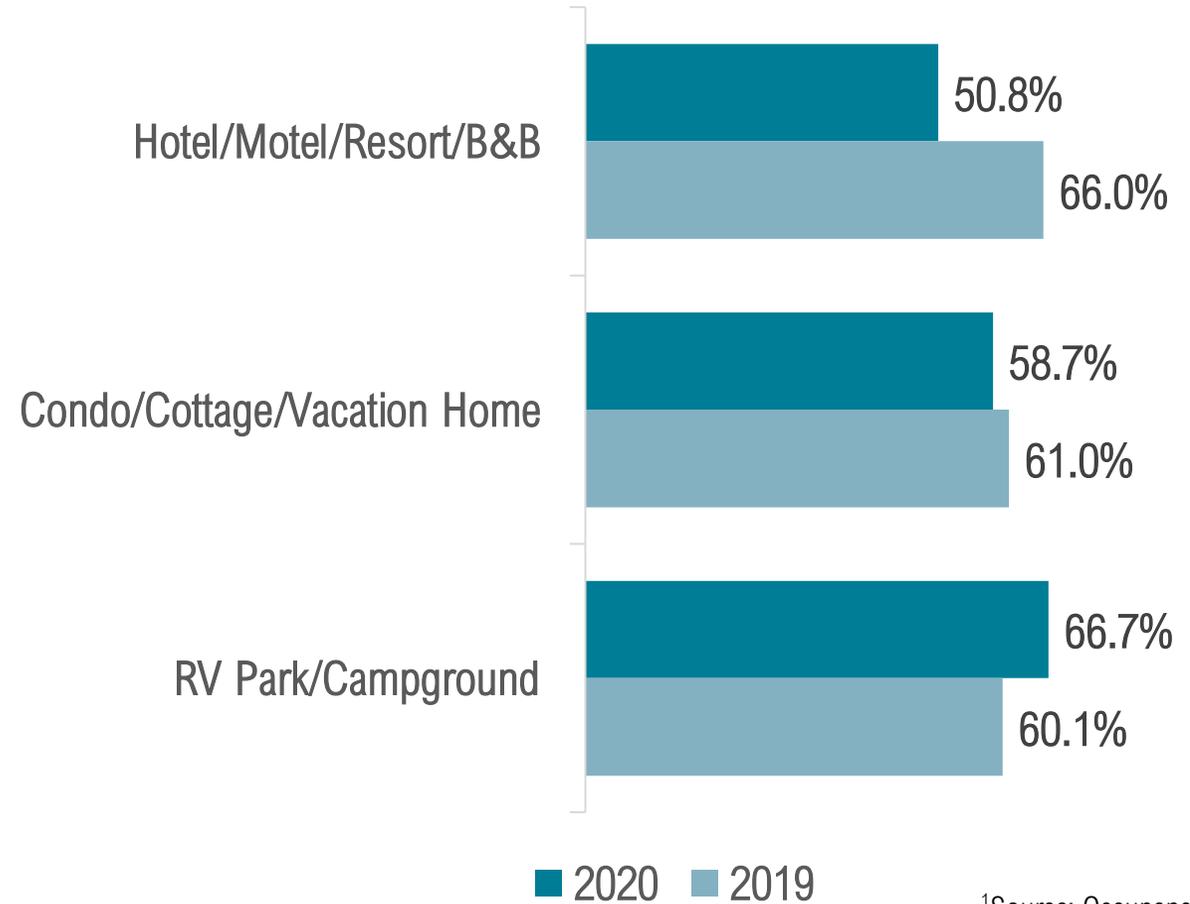
RevPAR (-8.4%)¹



¹Source: Occupancy Survey

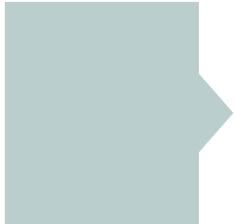
OCCUPANCY

Average occupancy in Oct – Dec was **57.2%¹** (63.1% in 2019).

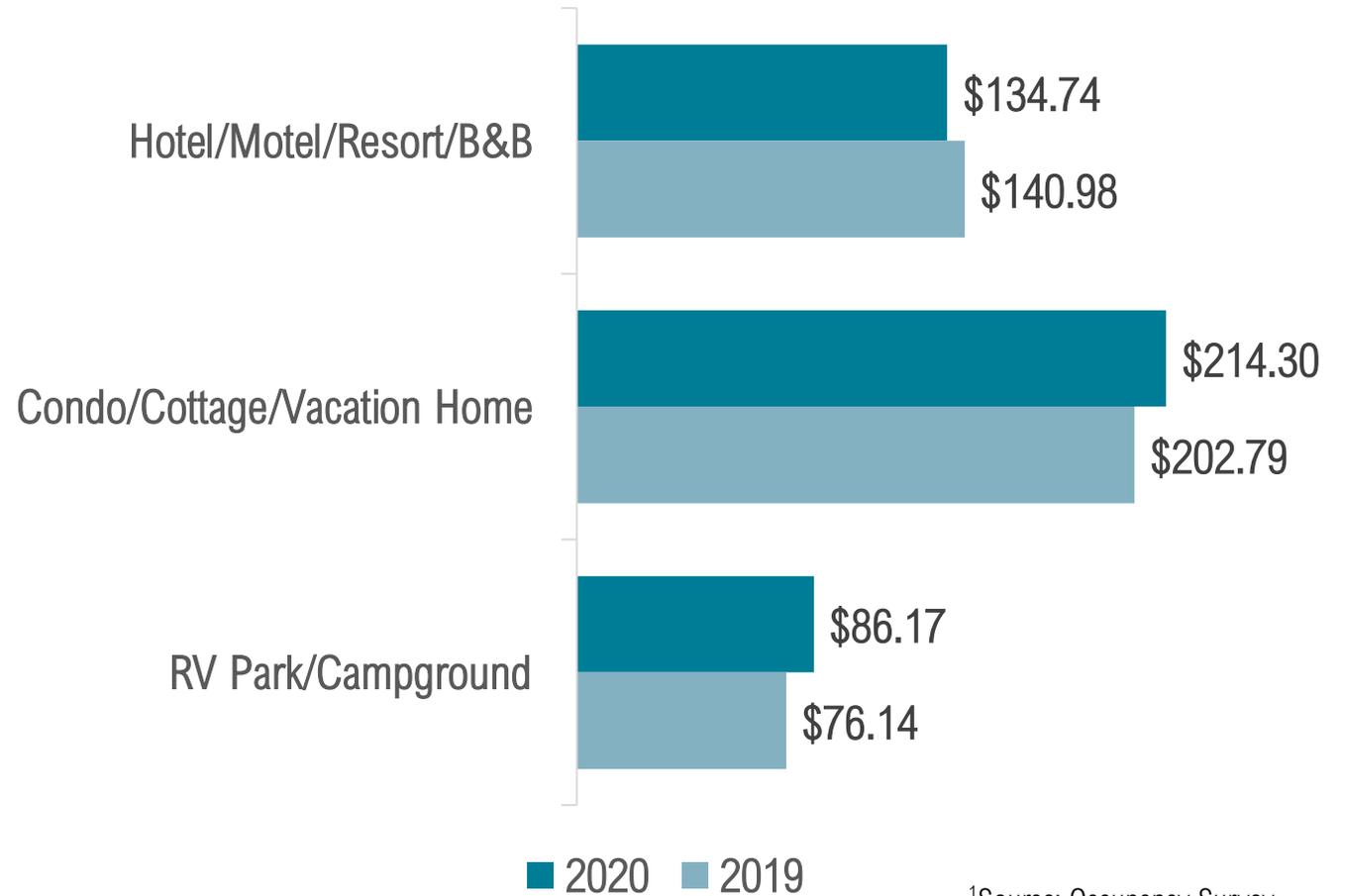


¹Source: Occupancy Survey

ADR



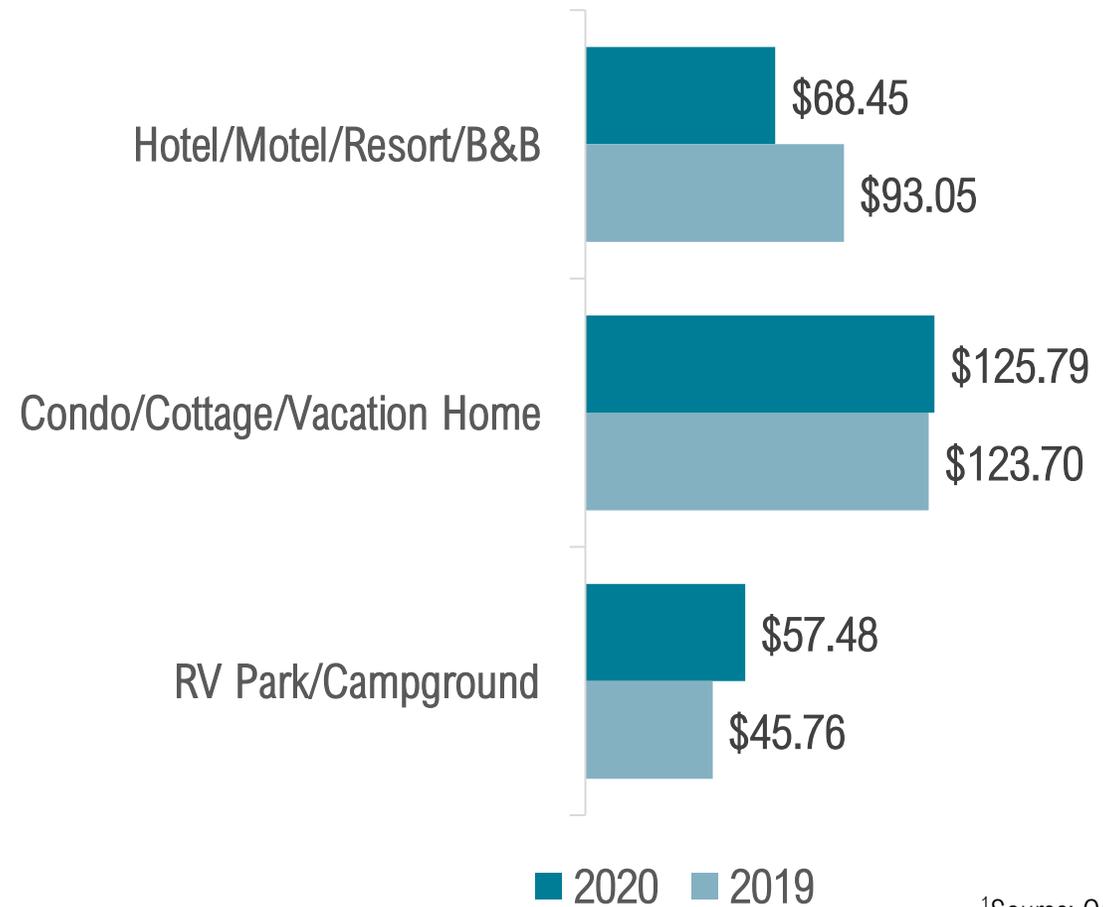
ADR in Oct – Dec was **\$138.82¹** (\$137.39 in 2019).



¹Source: Occupancy Survey

REVPAR

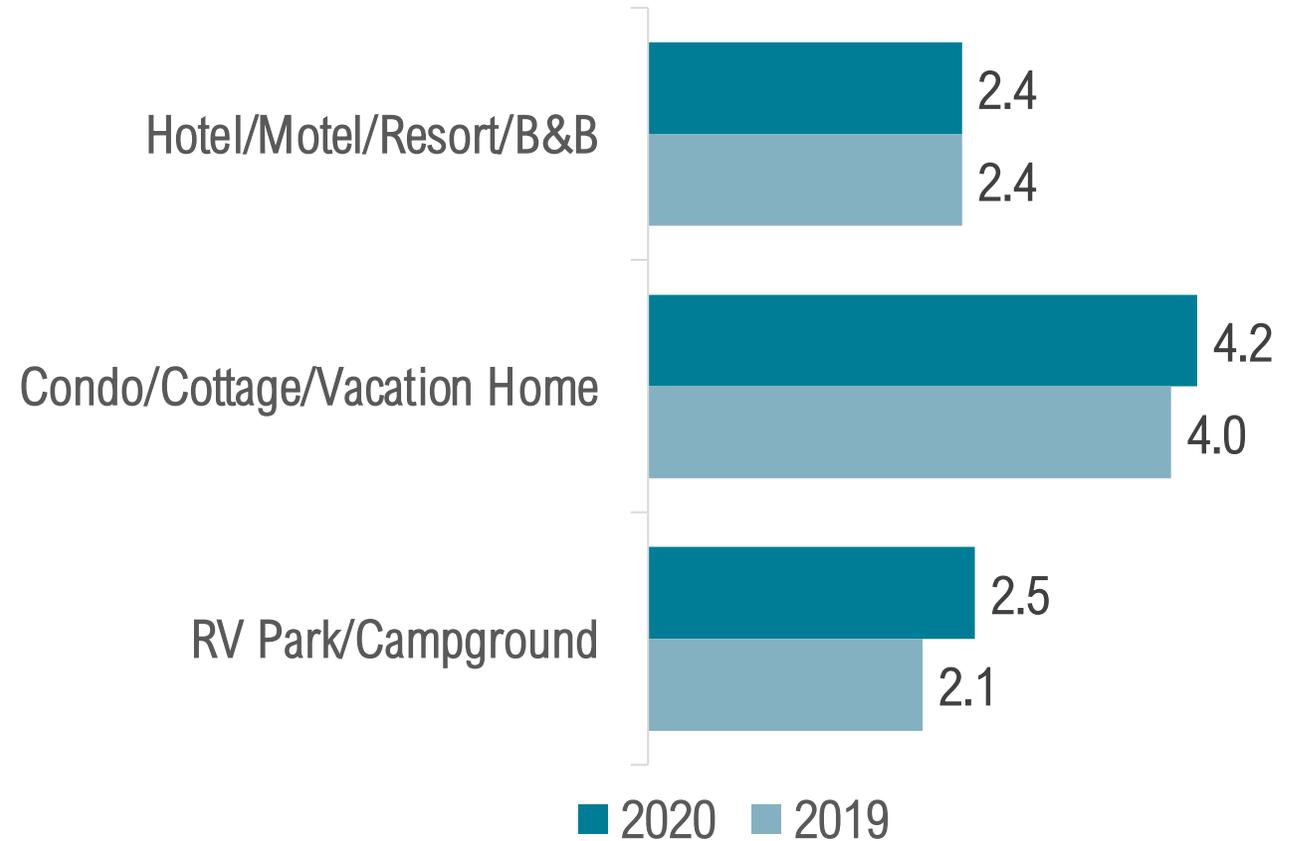
Average RevPAR in Oct – Dec was **\$79.41** (\$86.69 in 2019).



¹Source: Occupancy Survey

TRAVEL PARTY SIZE

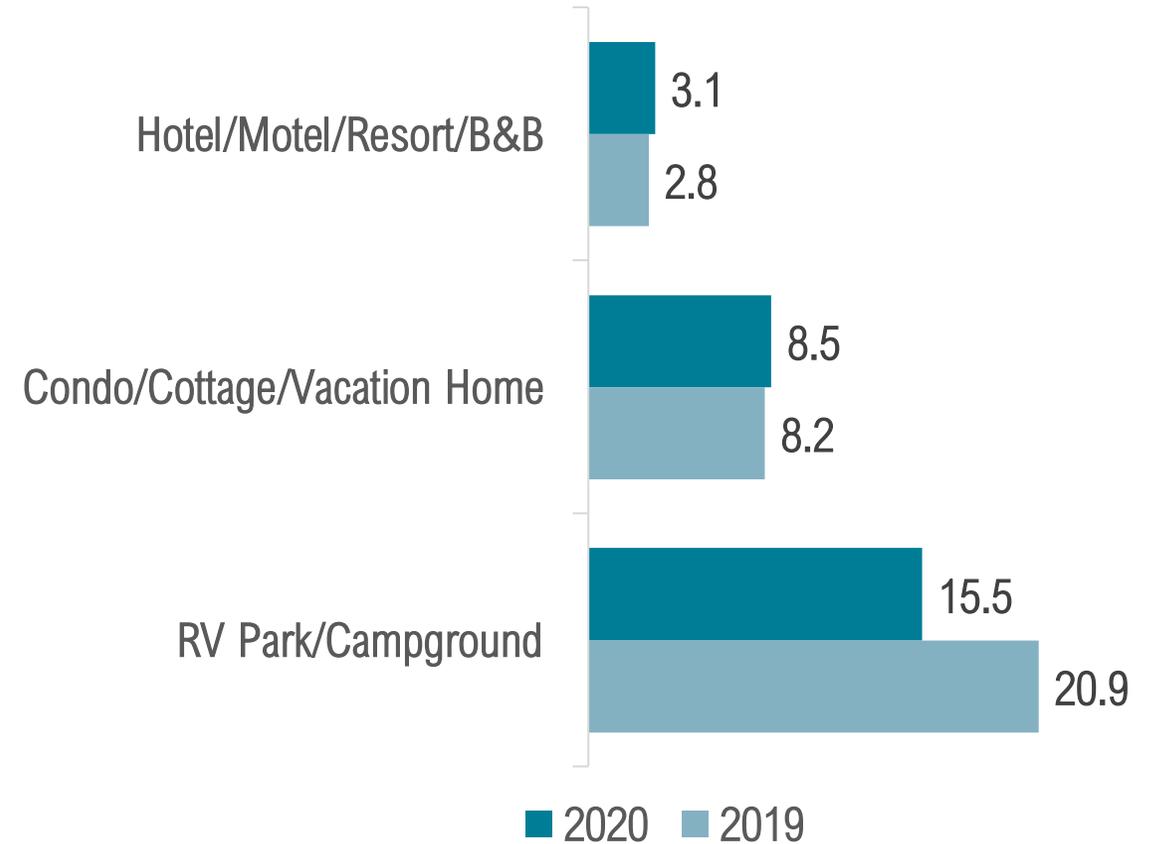
For visitors in paid accommodations, average travel party size in Oct – Dec was **2.8 people**¹ (2.7 people in 2019).



¹Source: Occupancy Survey

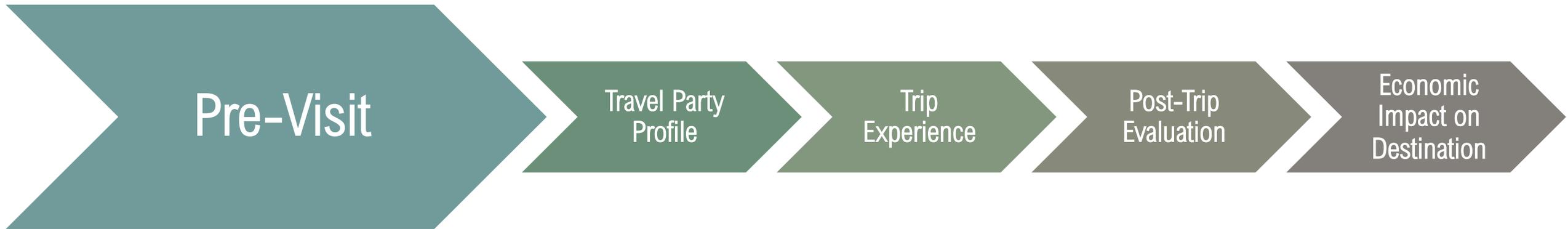
LENGTH OF STAY

For visitors in paid accommodations, average length of stay in Oct – Dec was **4.6 nights¹** (4.8 nights in 2019).



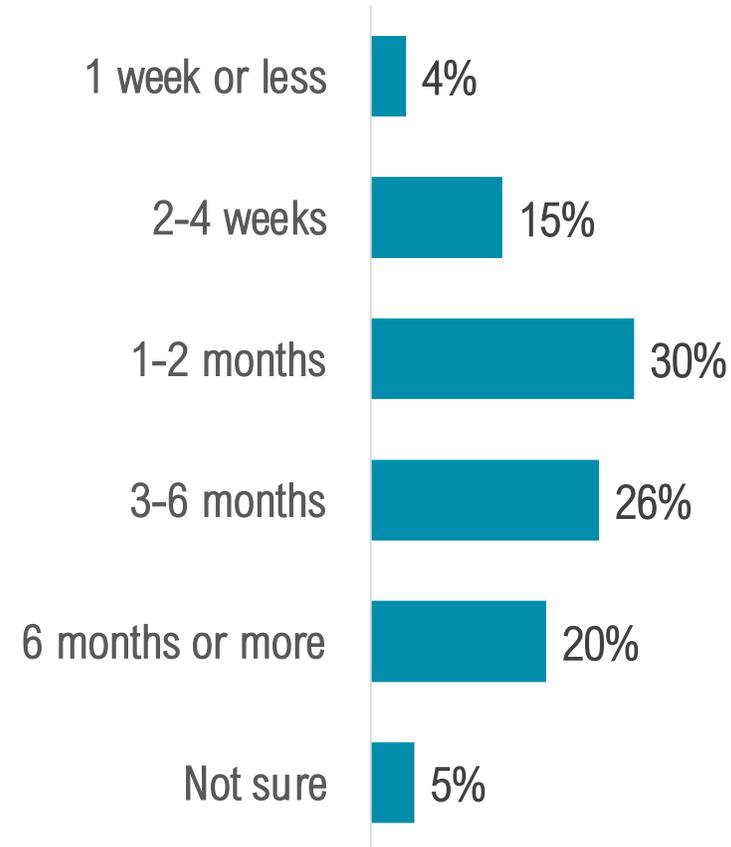
¹Source: Occupancy Survey

Visitor Journey: Pre-Visit



TRIP PLANNING CYCLE

Nearly **half** of visitors planned their trip **at least 3 months** in advance, while fewer than **1 in 5** planned their trip **less than a month** in advance.

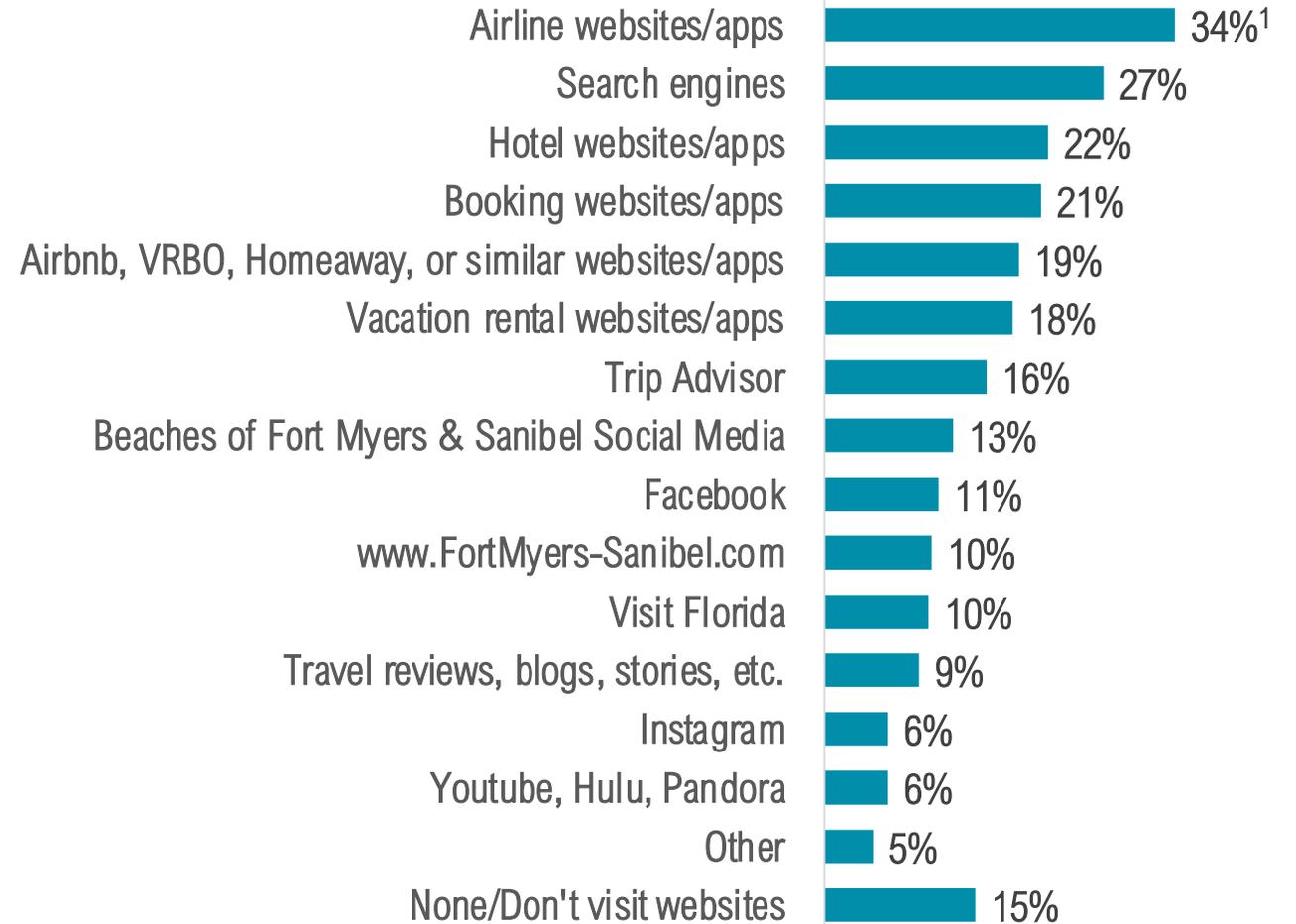


TRIP PLANNING: WEBSITES/APPS USED

Nearly 9 in 10 visitors used **websites** to plan their trip to The Beaches of Fort Myers & Sanibel.

Visitors were more likely to use **search engines** and **airline/hotel websites** to plan their trips.

2020 visitors were more likely to use **Beaches of Fort Myers and Sanibel Social Media** and **the website** to plan their trips.



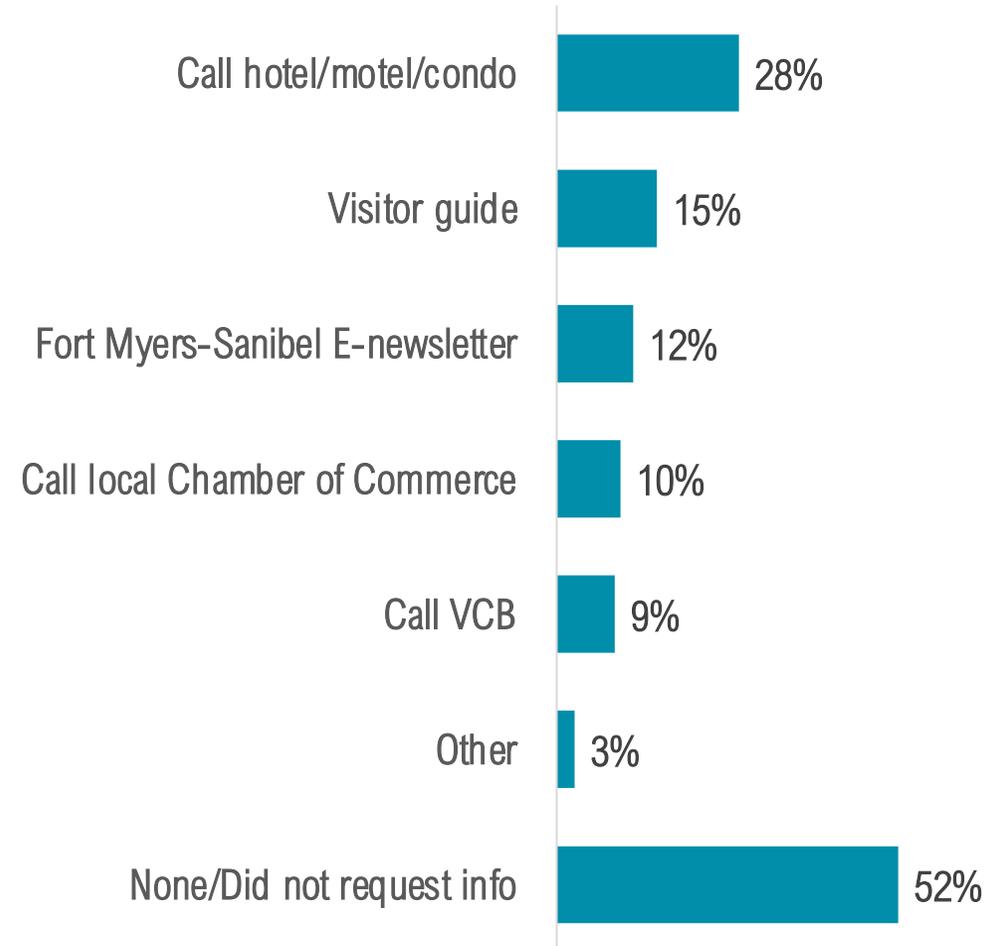
¹Multiple responses permitted.

TRIP PLANNING: INFORMATION REQUESTS

Nearly half of 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 October-December 2020



¹Multiple responses permitted.

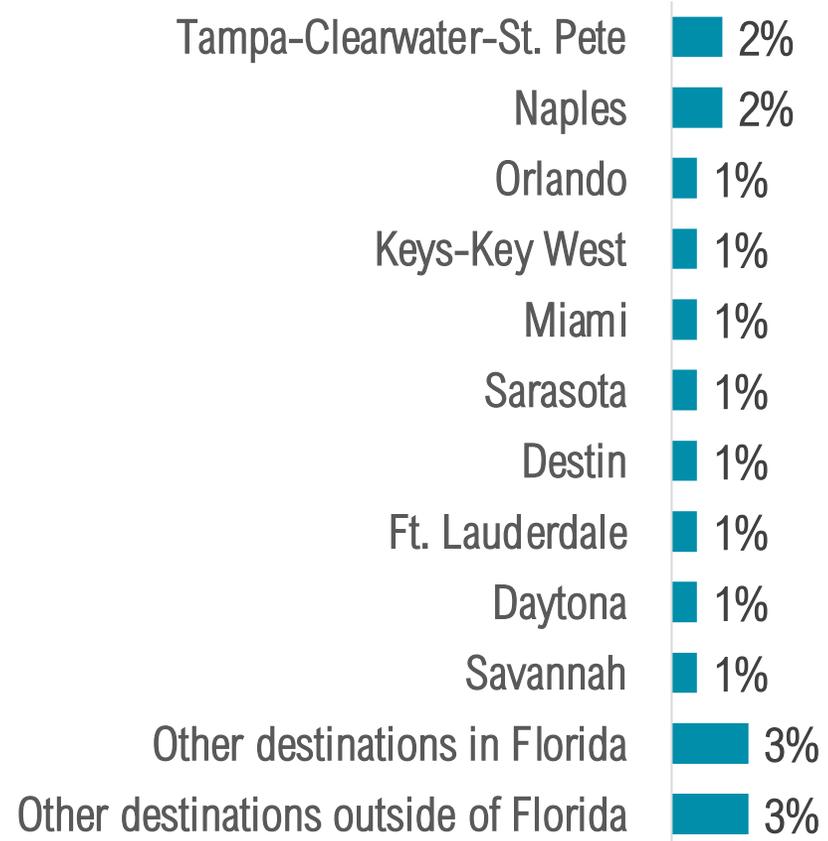
TRIP PLANNING: OTHER DESTINATIONS CONSIDERED



18% of visitors considered **choosing other destinations** when planning their trips.

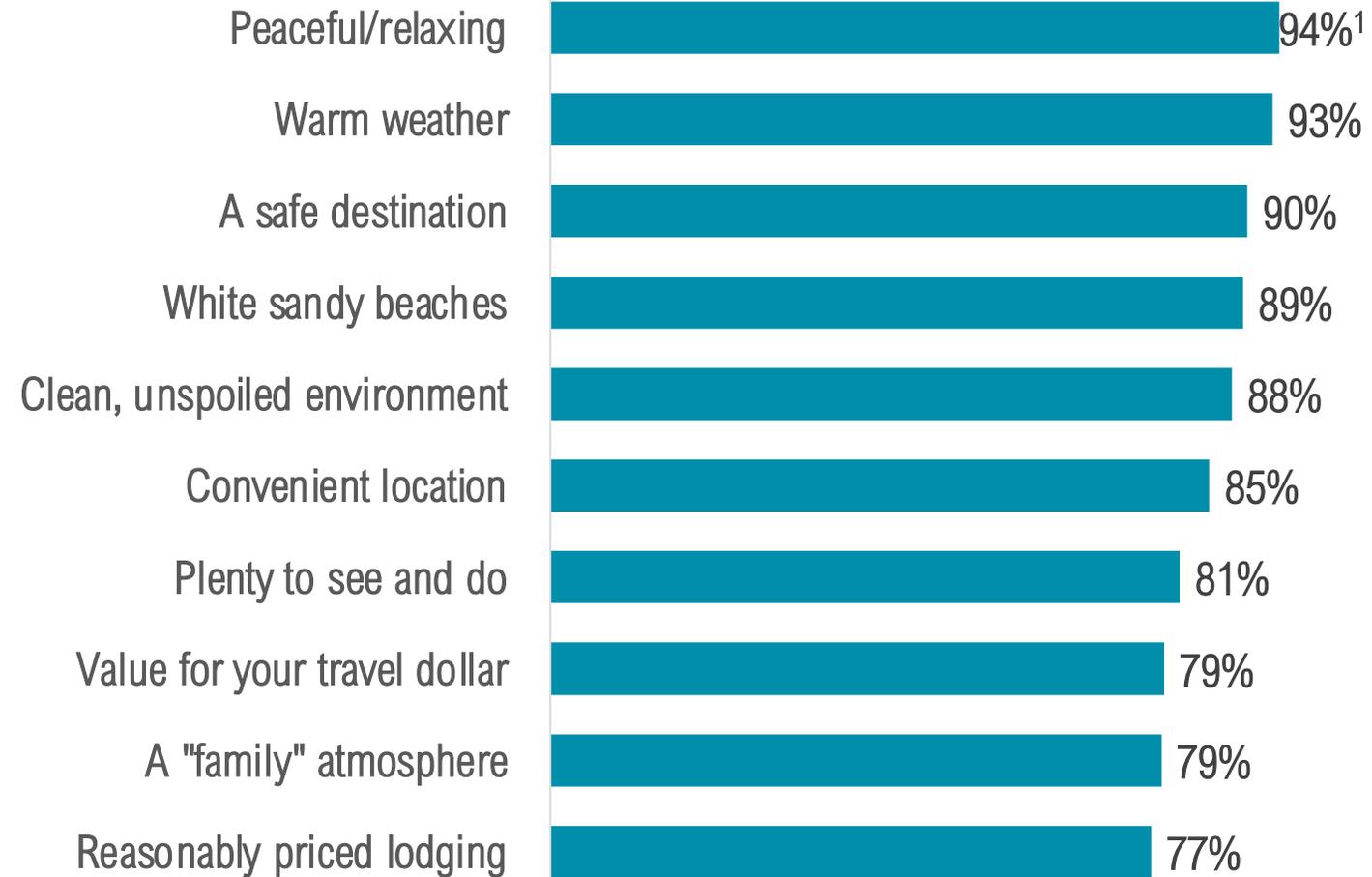


Most alternative destinations were in **Florida**.



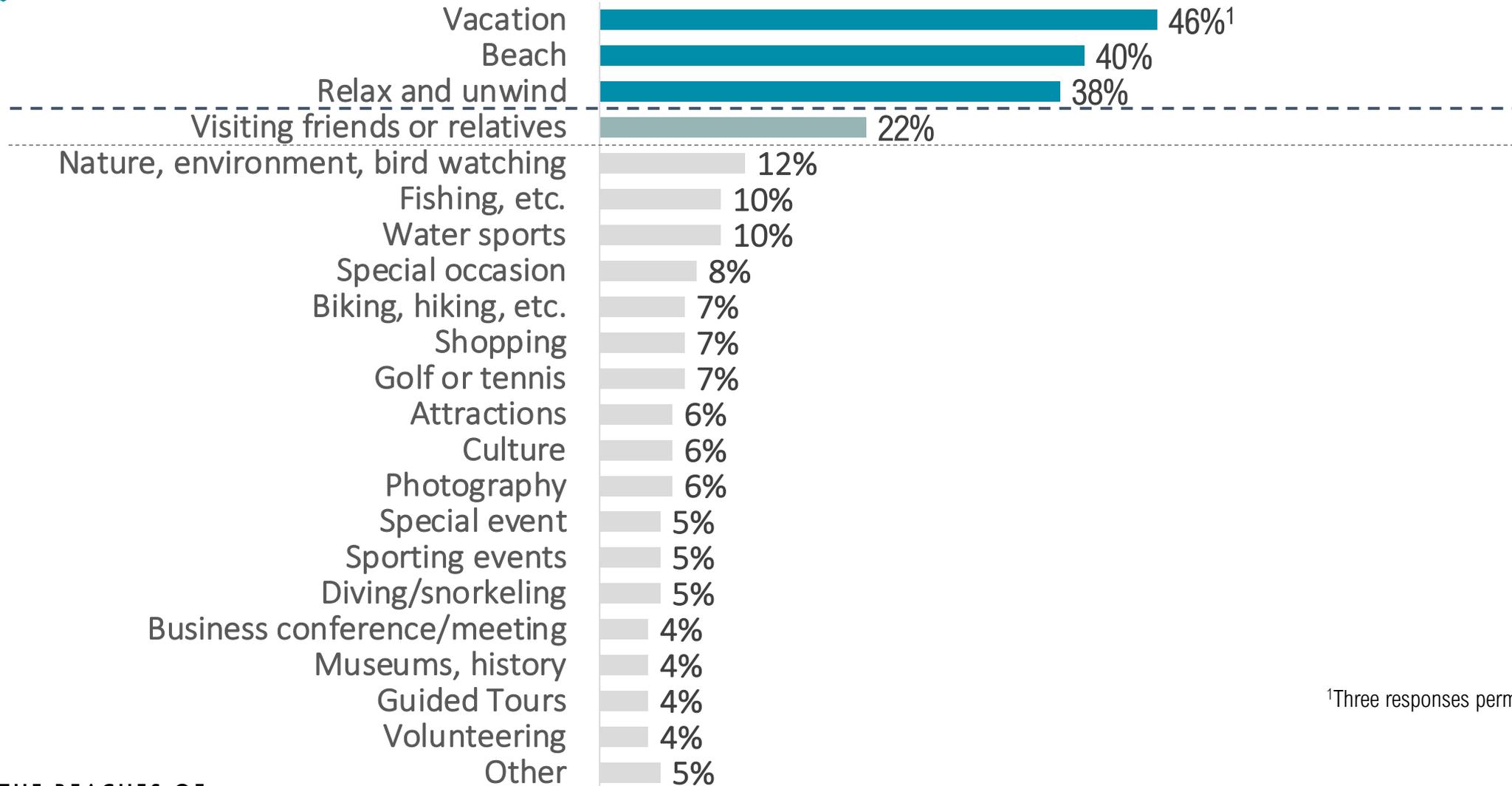
TRIP INFLUENCERS

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



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

REASON FOR VISITING



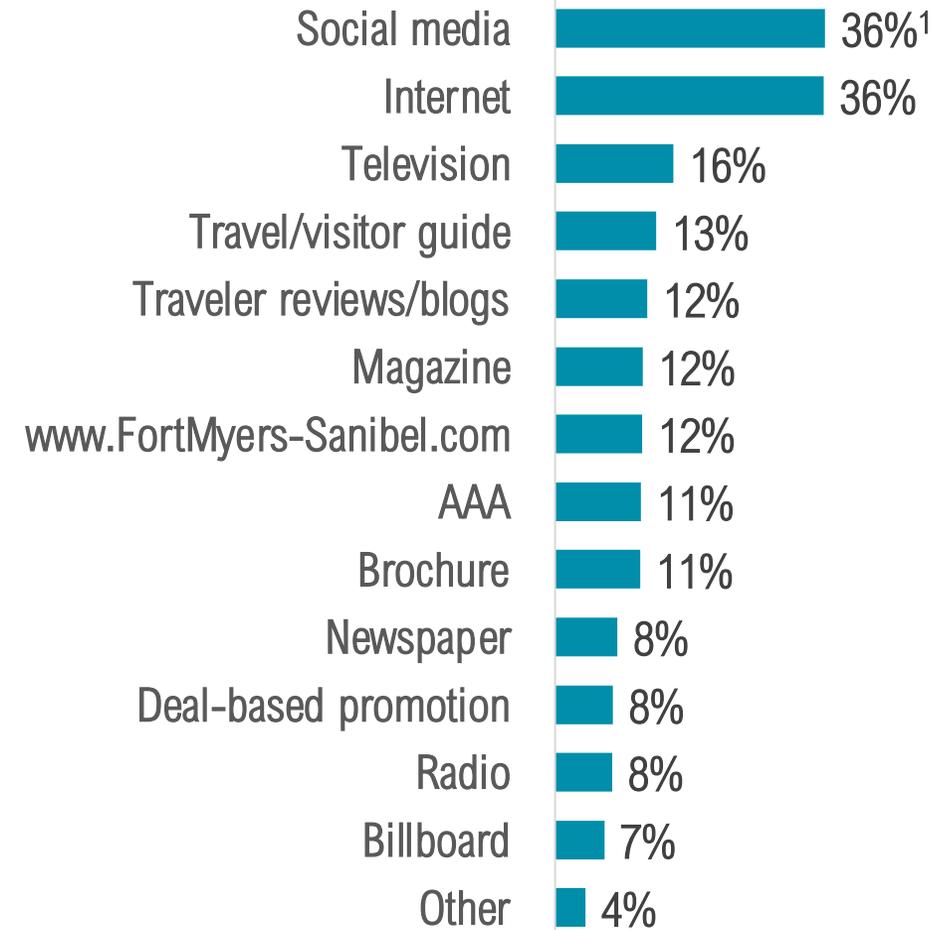
¹Three responses permitted.

PROMOTIONS



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

Source of Promotion

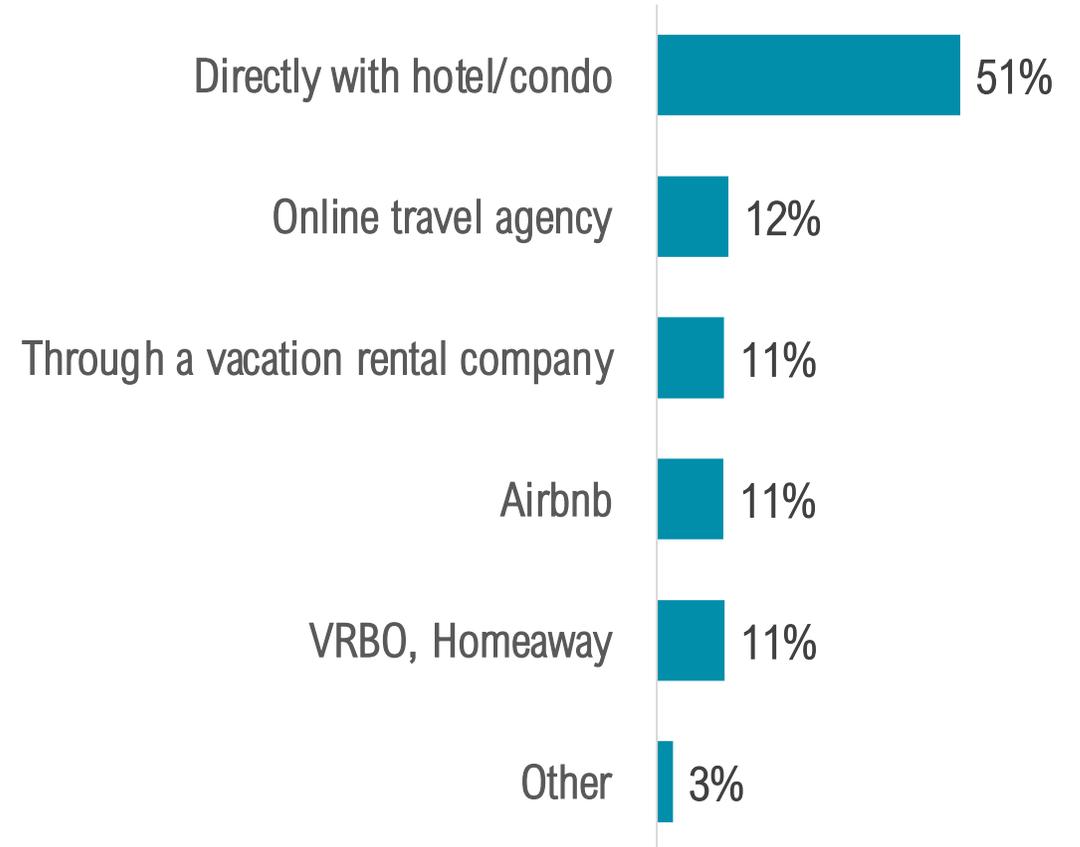


¹Multiple responses permitted.

BOOKING



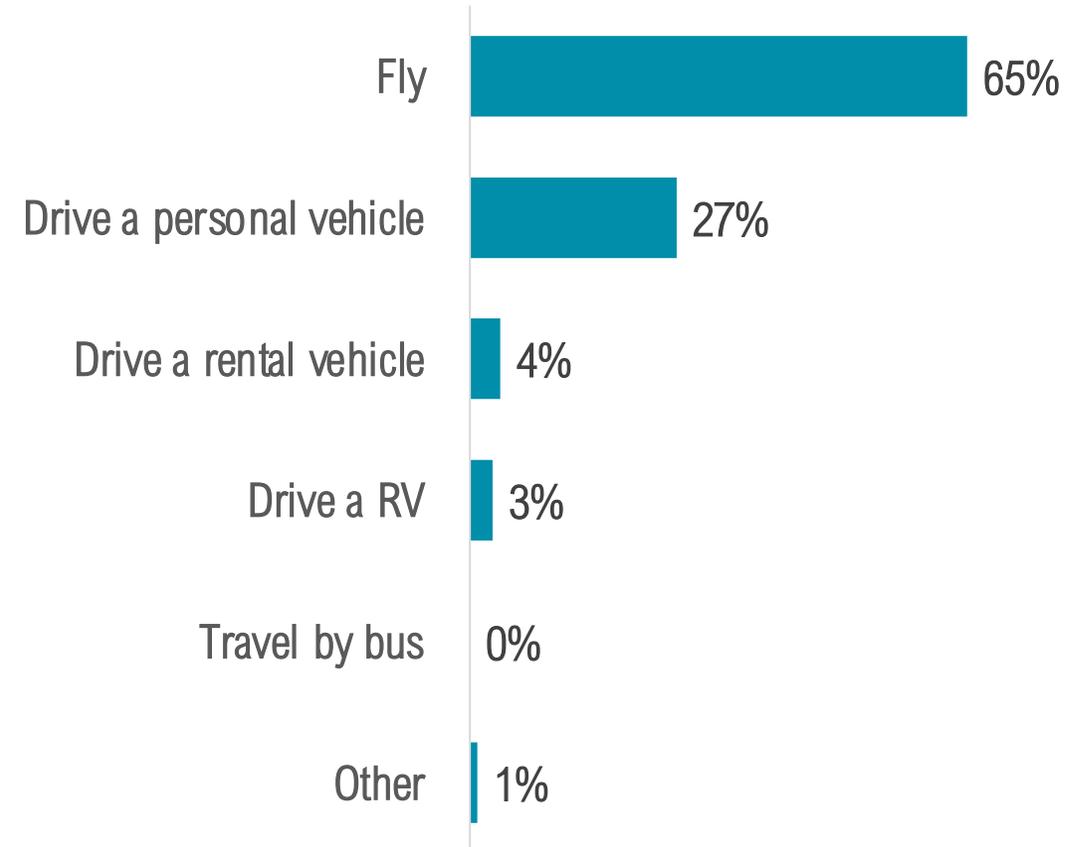
Over **half** of visitors who stayed in paid accommodations **booked directly with a hotel/condo.**



TRANSPORTATION



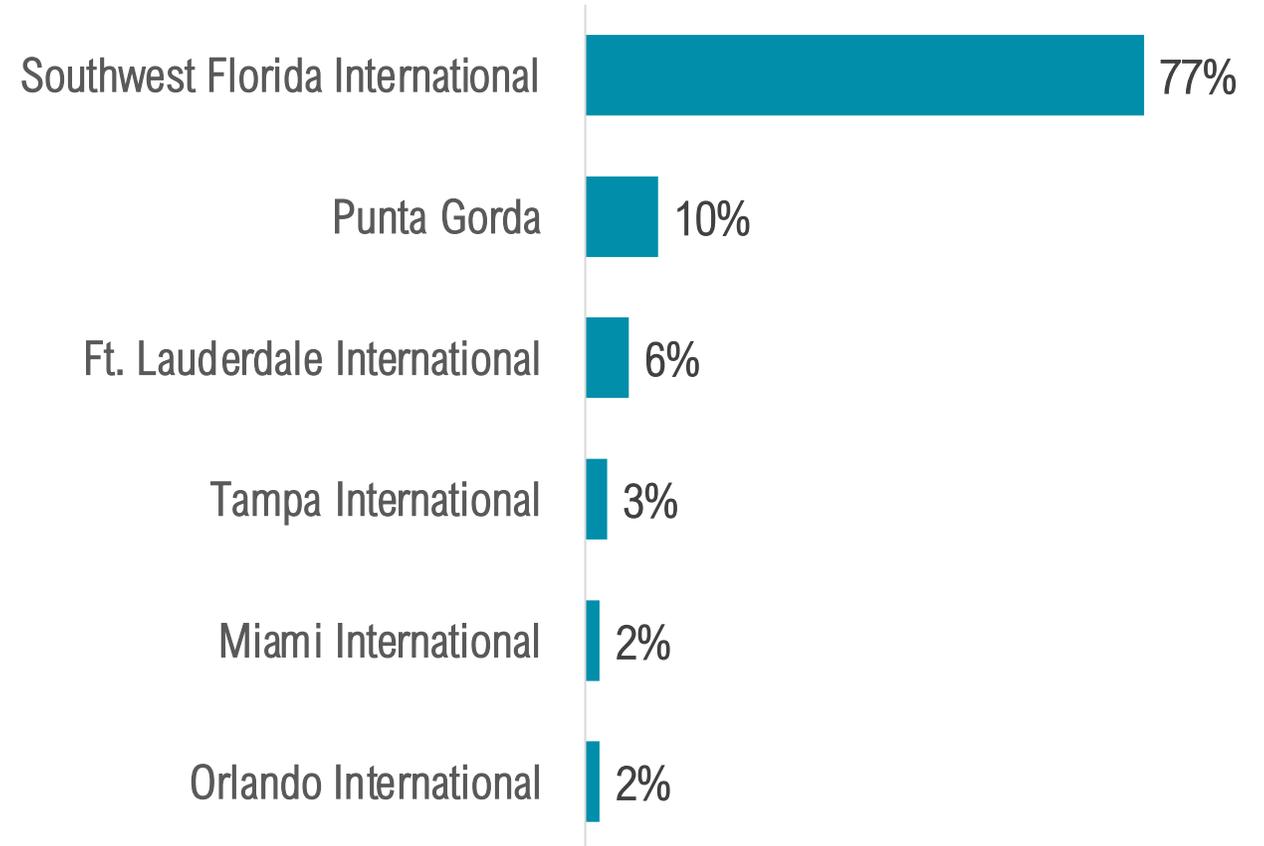
2 in 3 visitors **flew** to The Beaches of Fort Myers & Sanibel.



AIRPORT



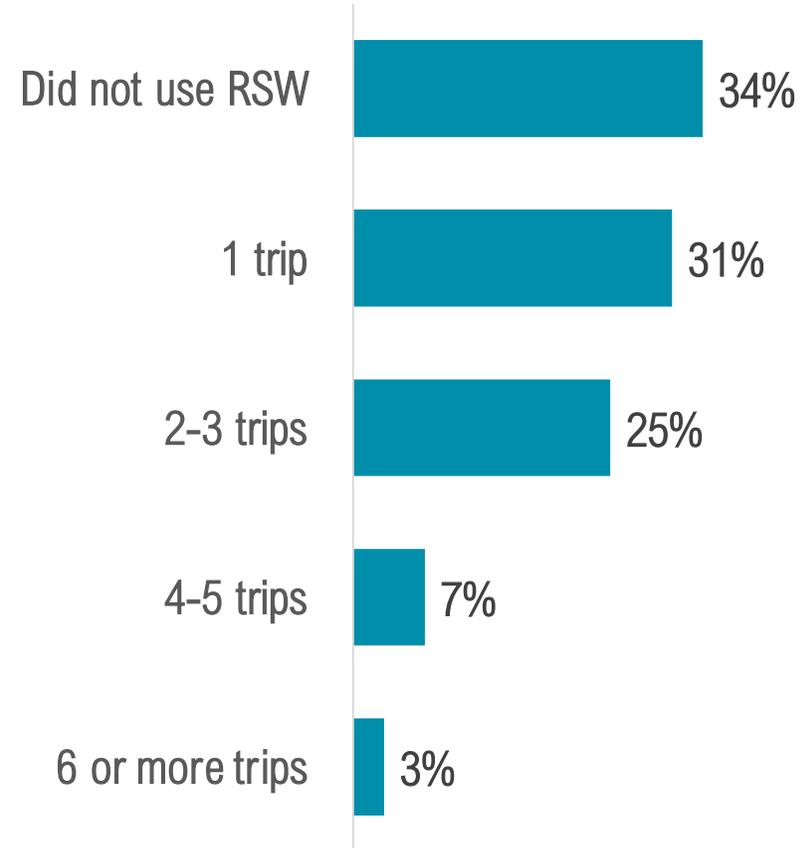
3 in 4 visitors who flew to The Beaches of Fort Myers & Sanibel came through **RSW**.



USE OF RSW IN THE PAST YEAR



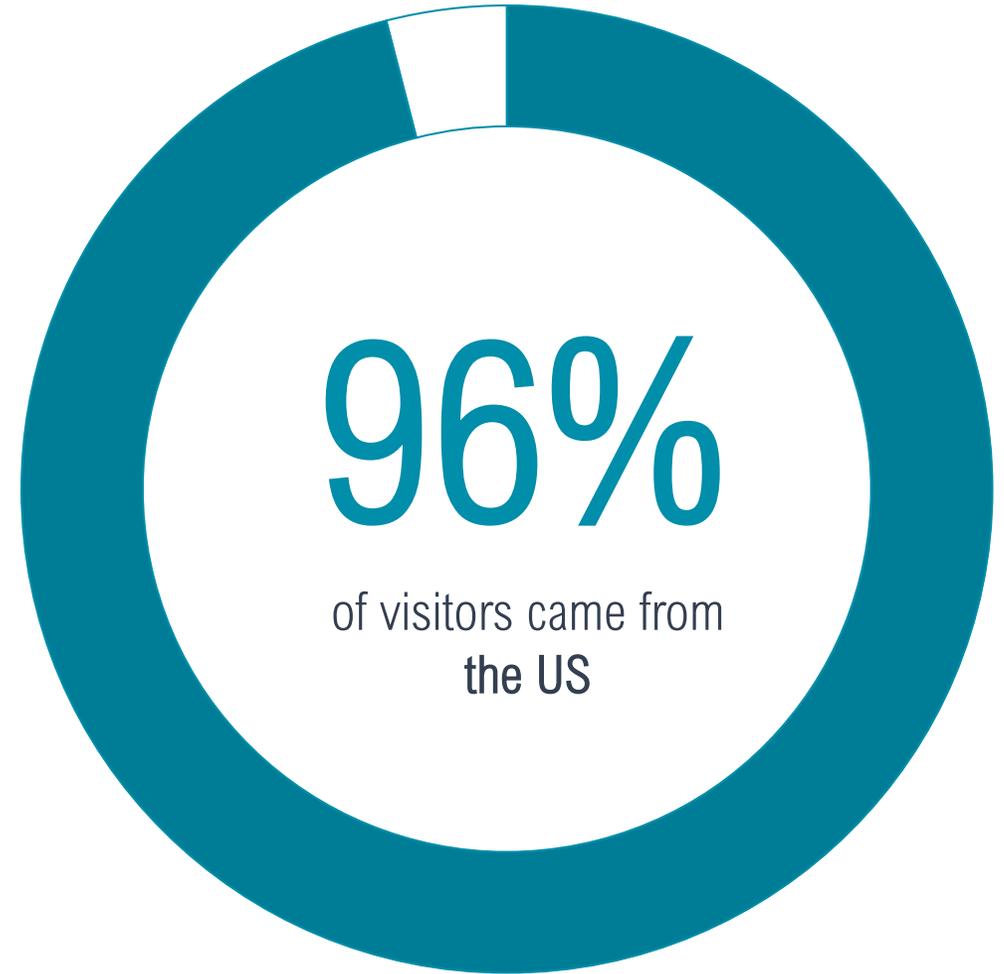
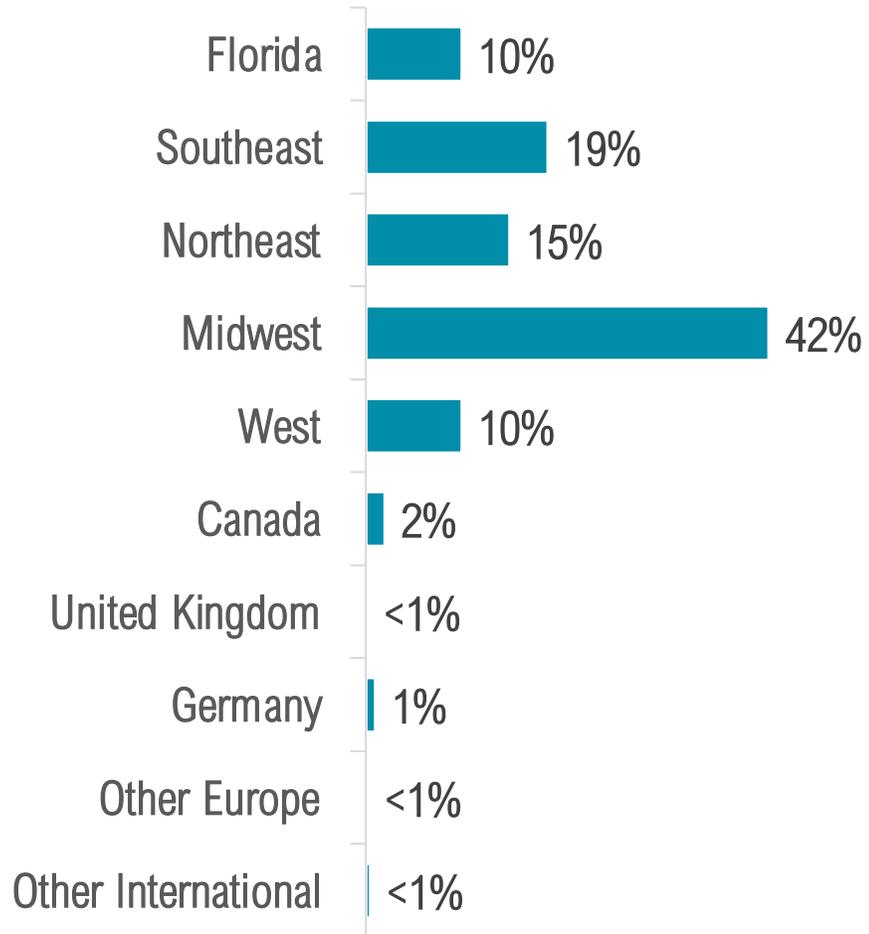
66% of visitors used RSW **at least once** in the past year.



VISITOR JOURNEY: TRAVEL PARTY PROFILE

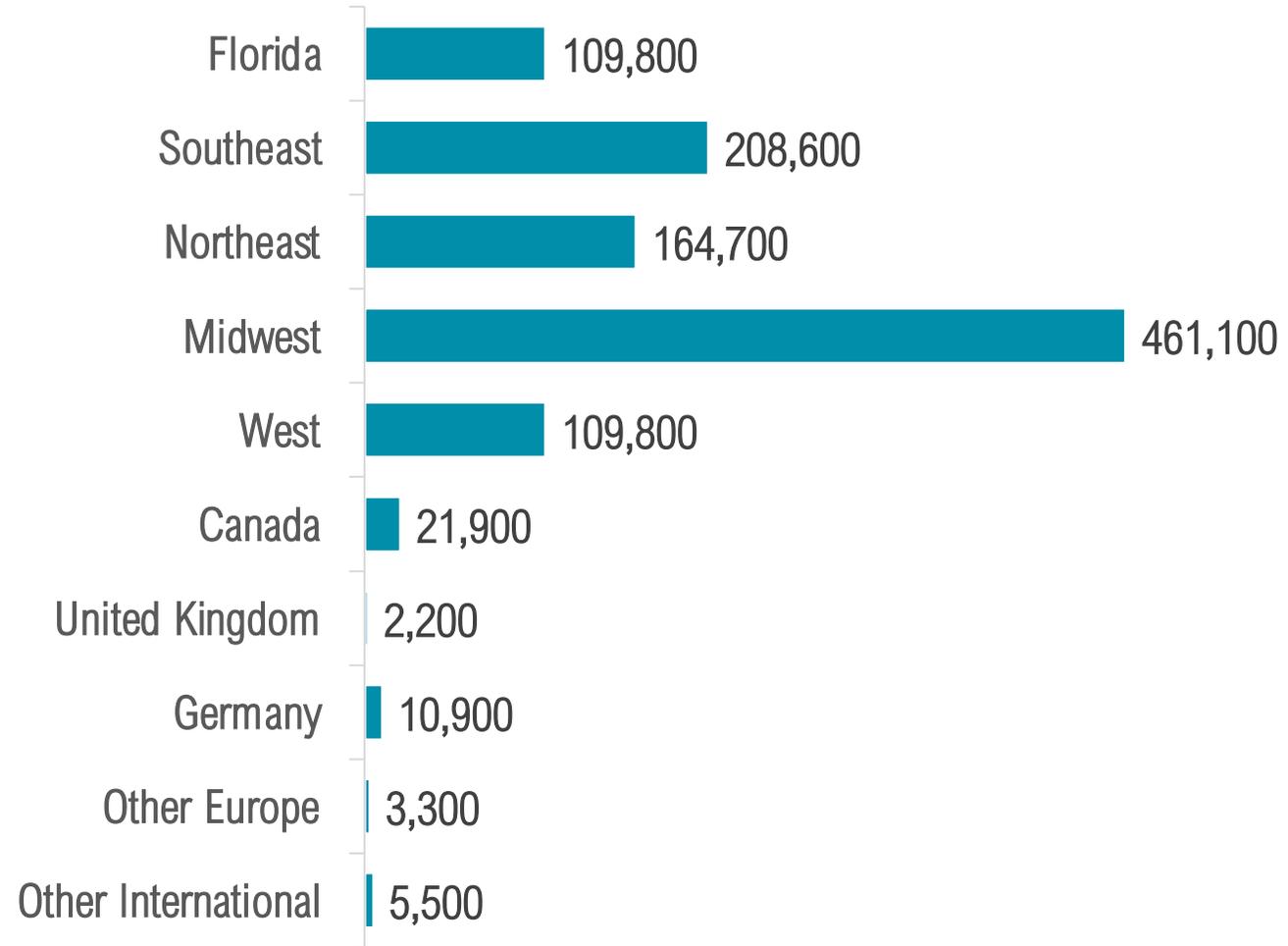


ORIGIN¹

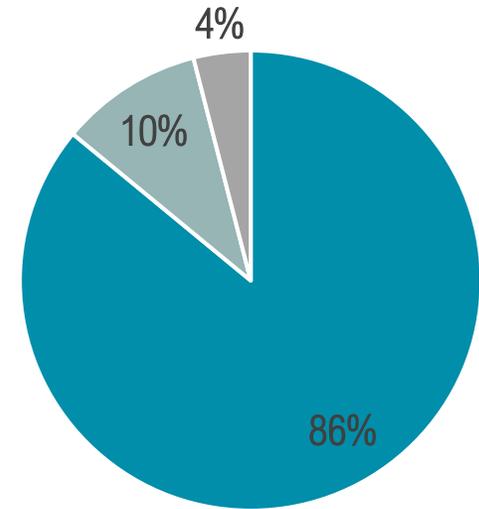
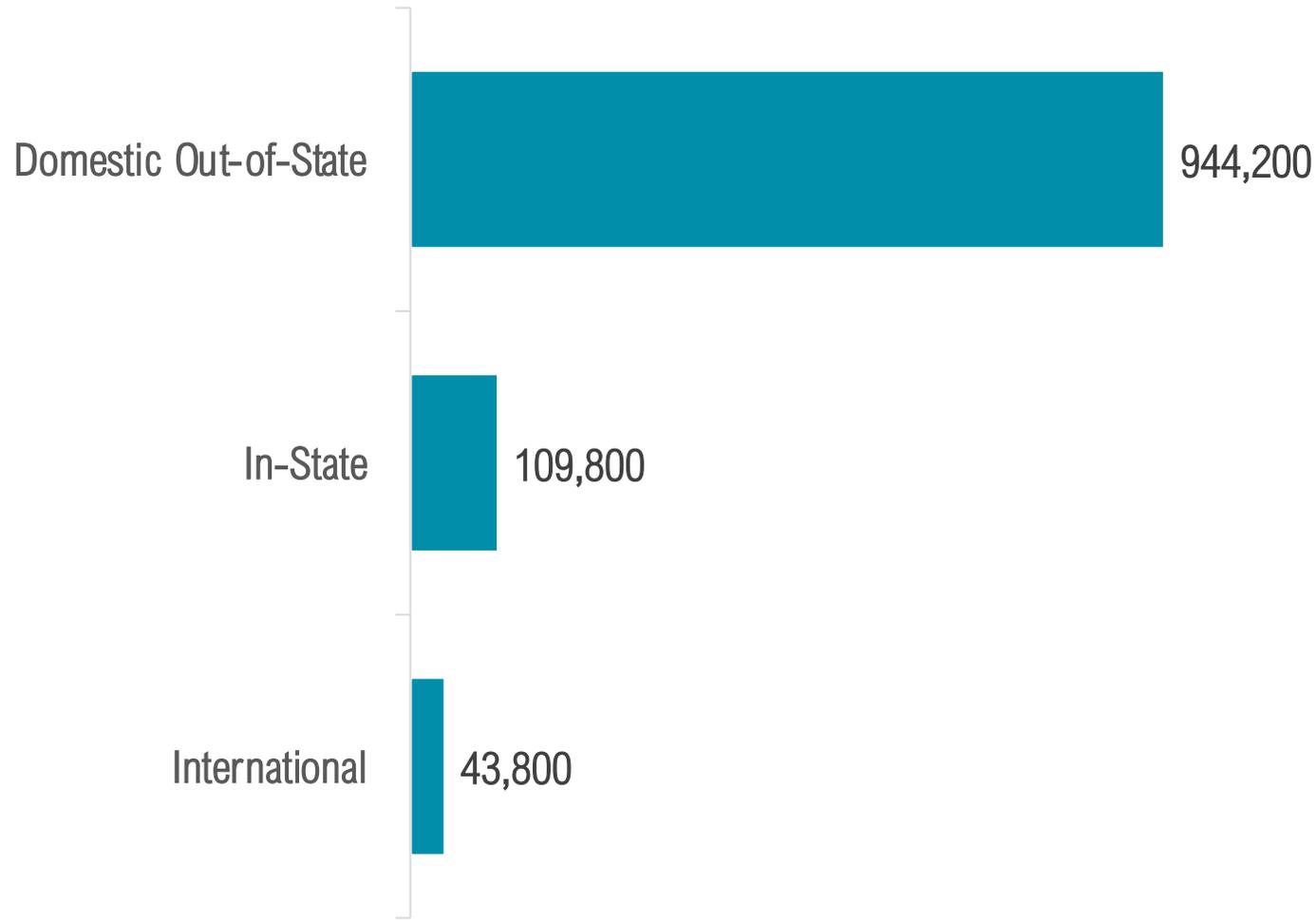


¹Includes visitors who stayed in paid accommodations, VFRs, and day trippers.

NUMBER OF VISITORS BY ORIGIN



NUMBER OF VISITORS BY ORIGIN



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

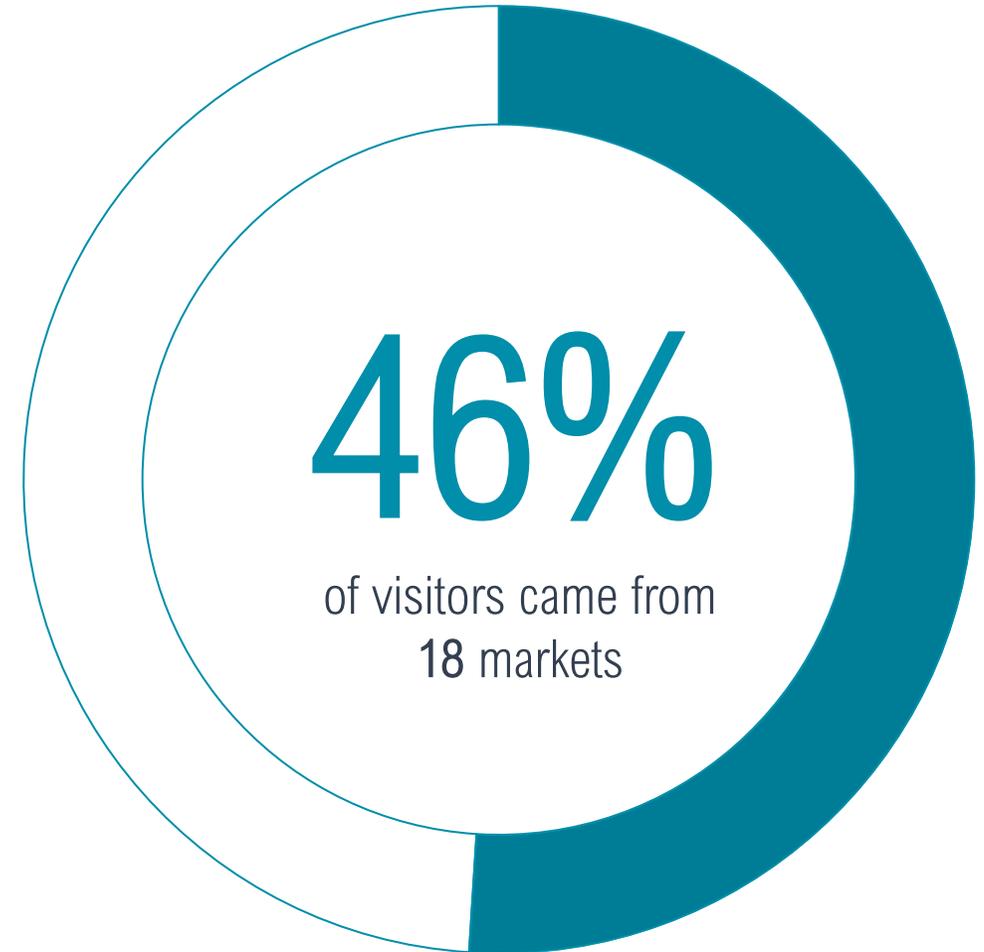
ORIGIN COUNTRY

Country ¹	% of Visitors
United States	96%
Canada	2%
Germany	1%
United Kingdom	0.2%
Other	0.8%

¹0.5% or fewer visitors came from Australia, Columbia, El Salvador, Holland, Italy, The Netherlands, Norway, Peru and Sweden.

ORIGIN MARKETS¹

Market	Percentage of Visitors
New York City	5%
Chicago	5%
Indianapolis	3%
Detroit	3%
Washington DC-Baltimore	3%
Milwaukee	3%
Miami-Ft. Lauderdale	2%
Minneapolis	2%
Atlanta	2%
Cleveland	2%
Green Bay-Appleton	2%
St. Louis	2%
Buffalo-Rochester	2%
Grand Rapids	2%
Raleigh-Durham	2%
Birmingham	2%
Las Vegas-Paradise	2%
Jacksonville	2%



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

TRAVEL PARTY SIZE AND COMPOSITION



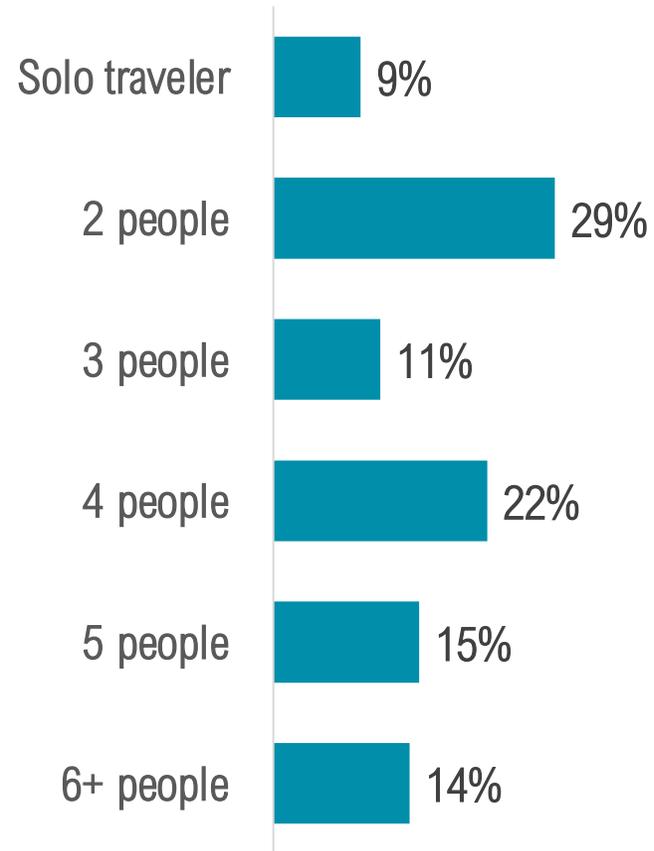
Travel Party Size

Visitors traveled in a party composed of **3.4¹ people**.



Travel with Children

29% of visitors **traveled with children** under the age of 18.

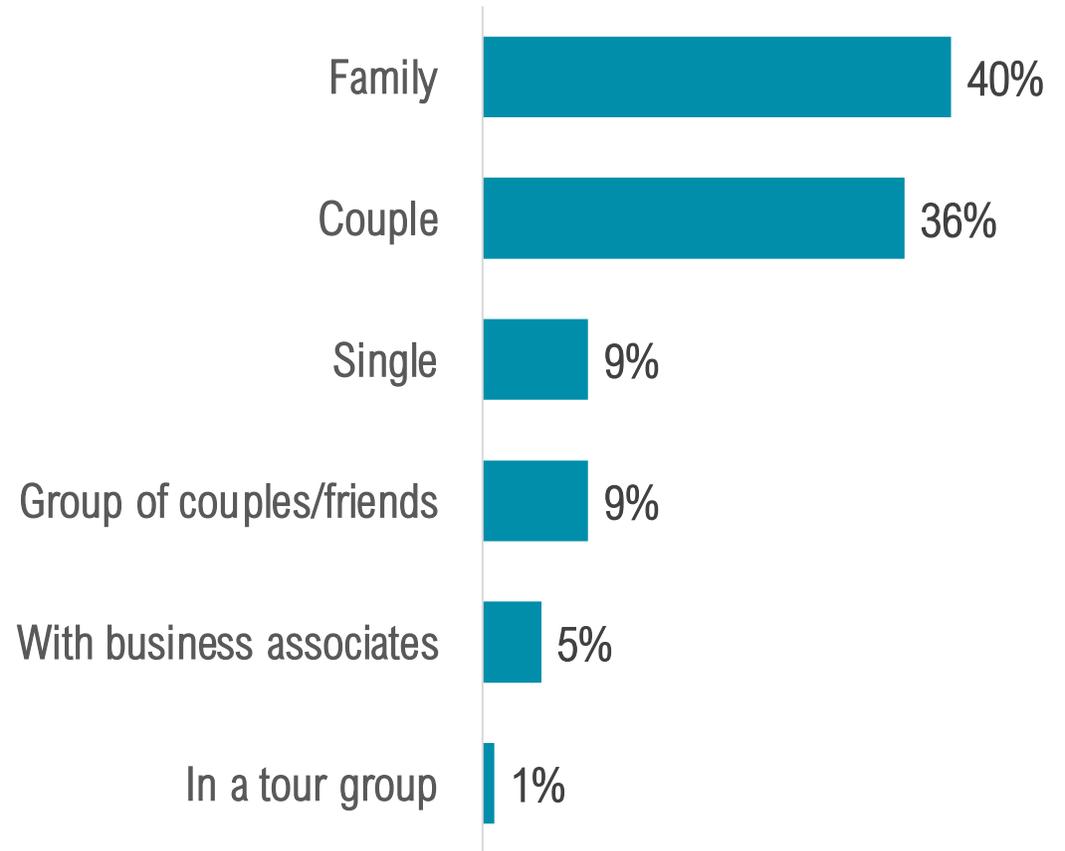


¹Source: Visitor Tracking Survey, includes all types of visitors

TRAVEL PARTY TYPE



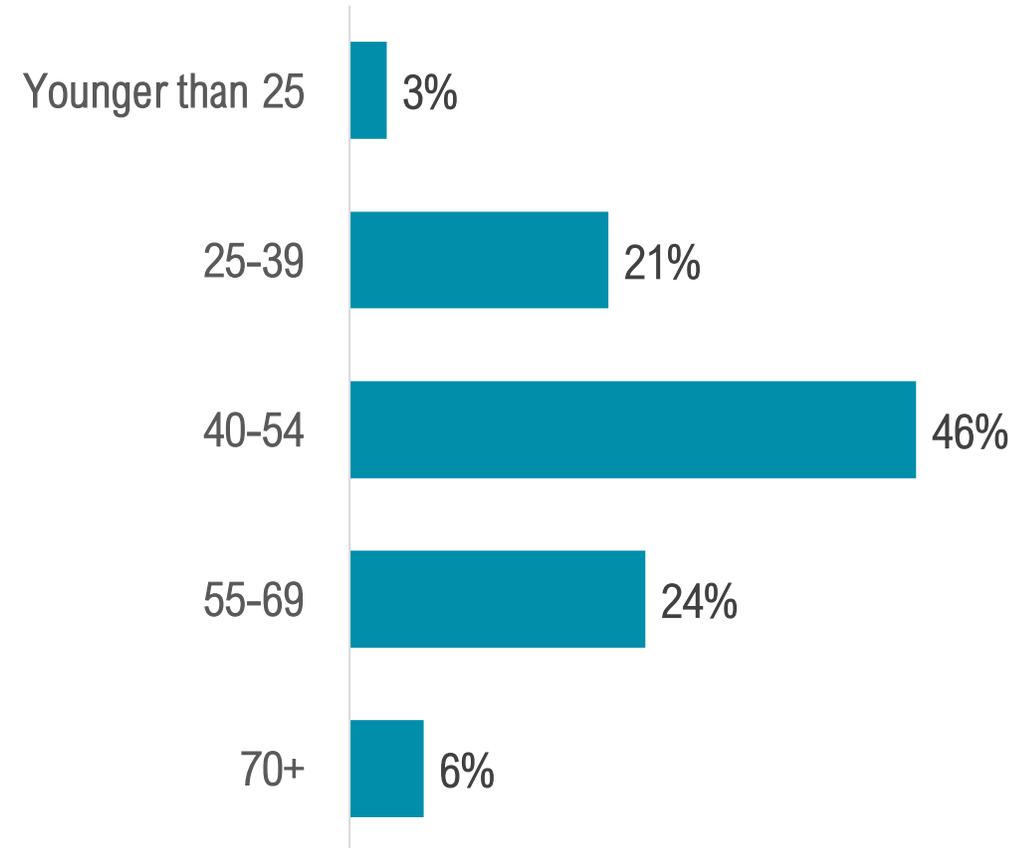
40% of visitors traveled as a family, while 36% traveled as a couple.



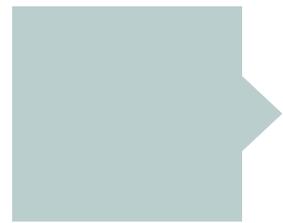
AGE

Average Age

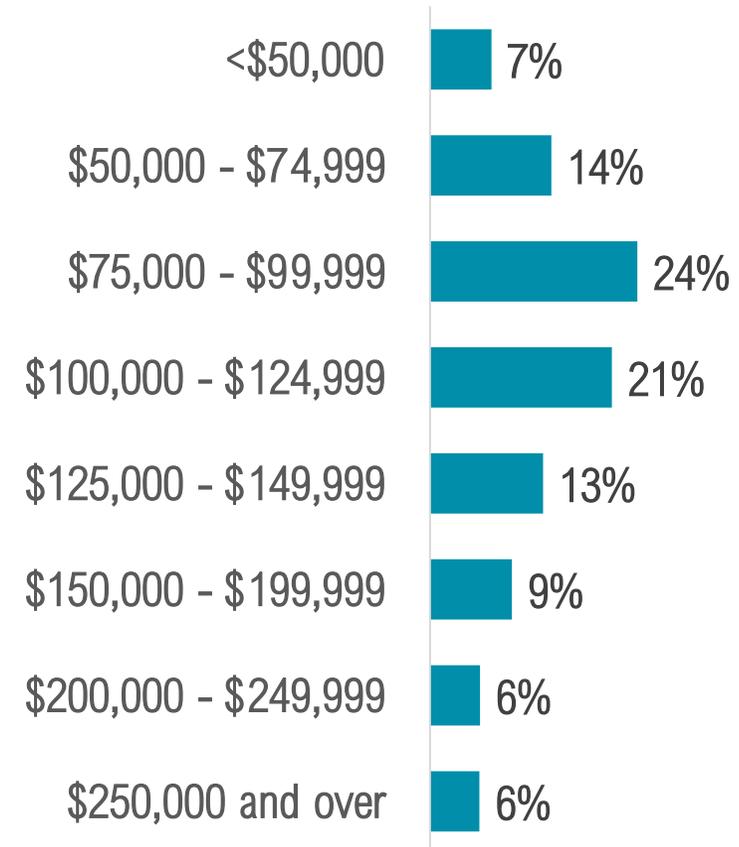
The average age of Oct – Dec visitors was **52 years old.**



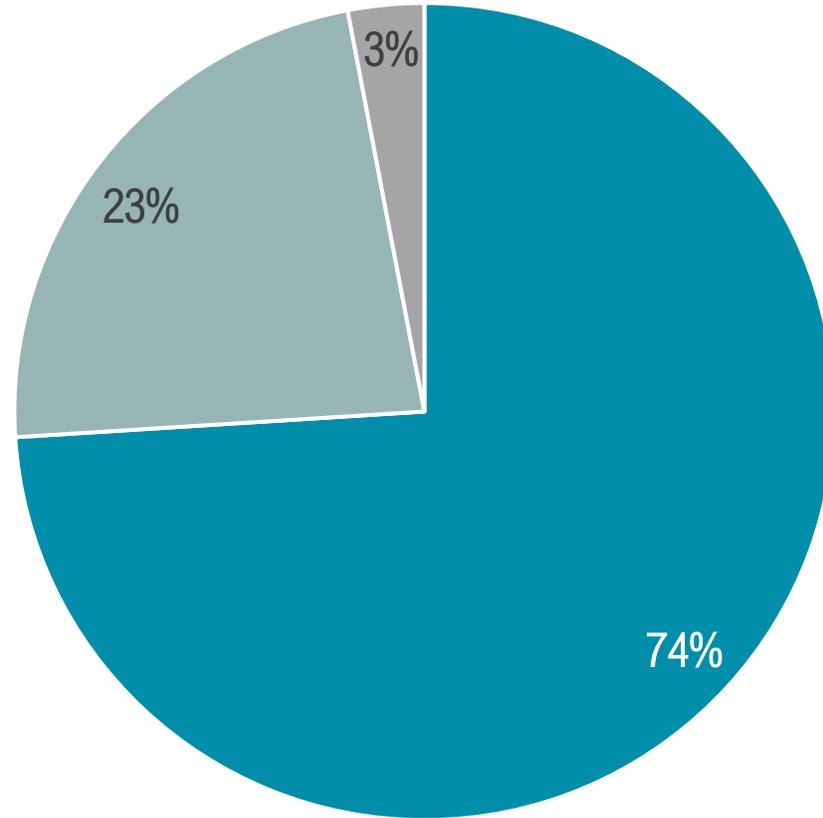
HOUSEHOLD INCOME



Median Household Income
Oct – Dec visitors had a median household income of **\$106,000**.



MARITAL STATUS



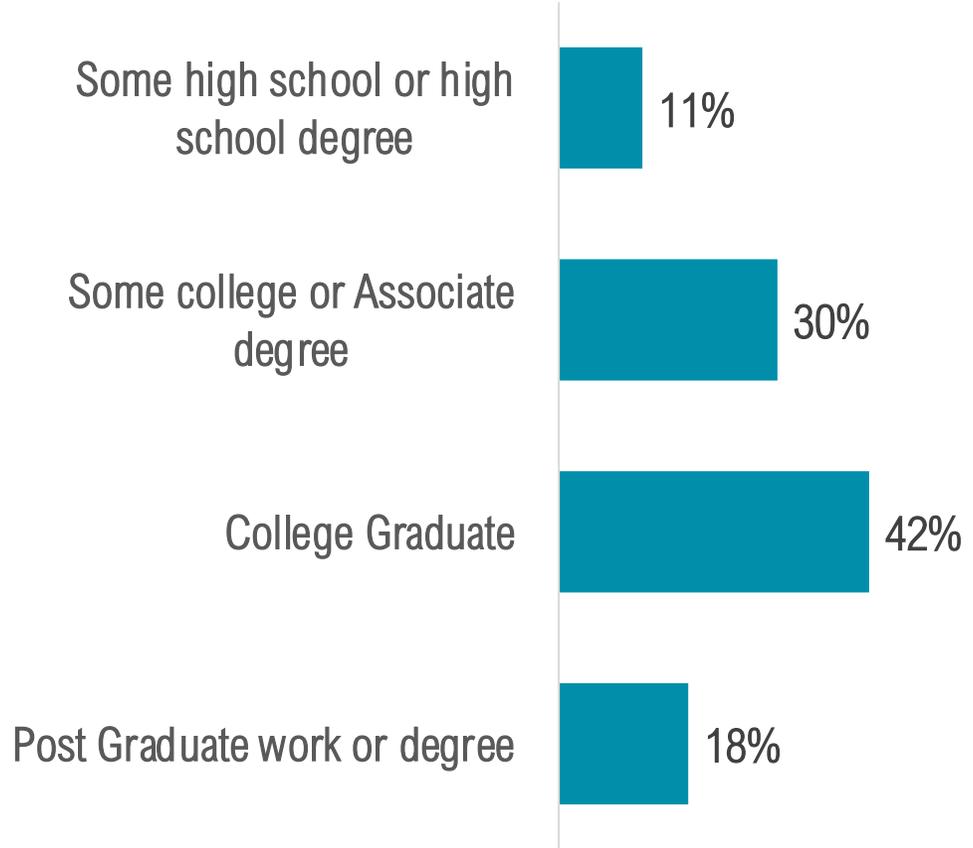
■ Married ■ Single ■ Other

EDUCATION

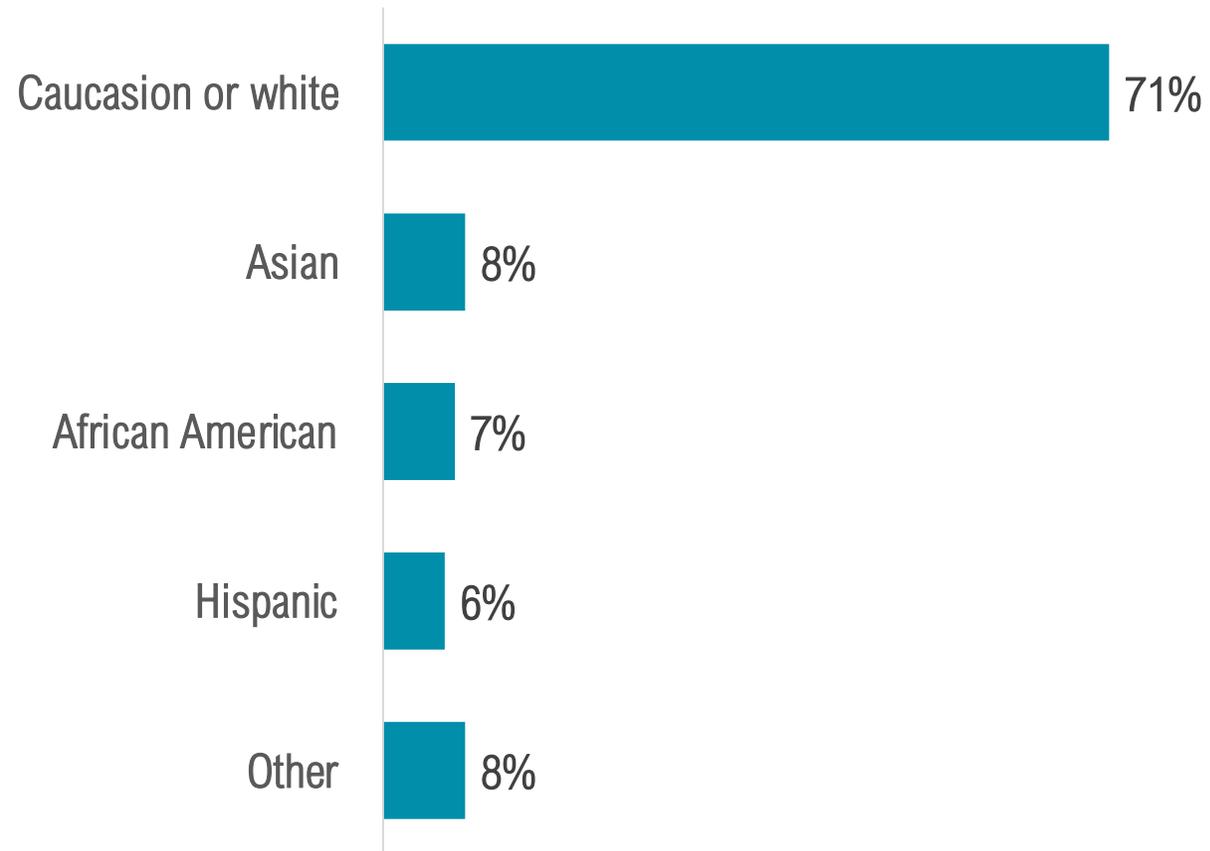


College Education

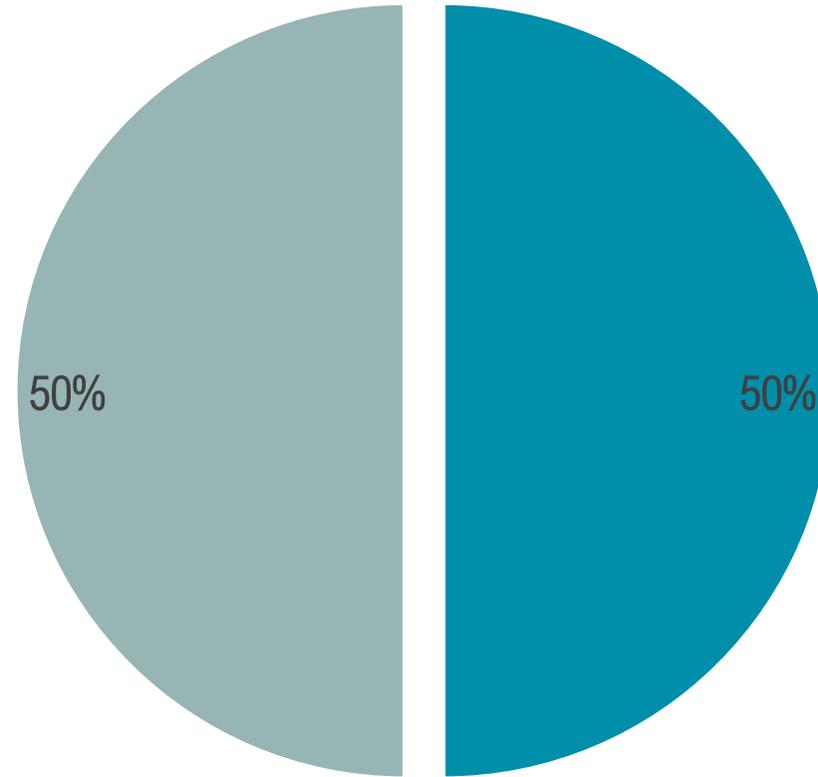
60% of Oct – Dec visitors were college graduates.



RACE/ETHNICITY



GENDER



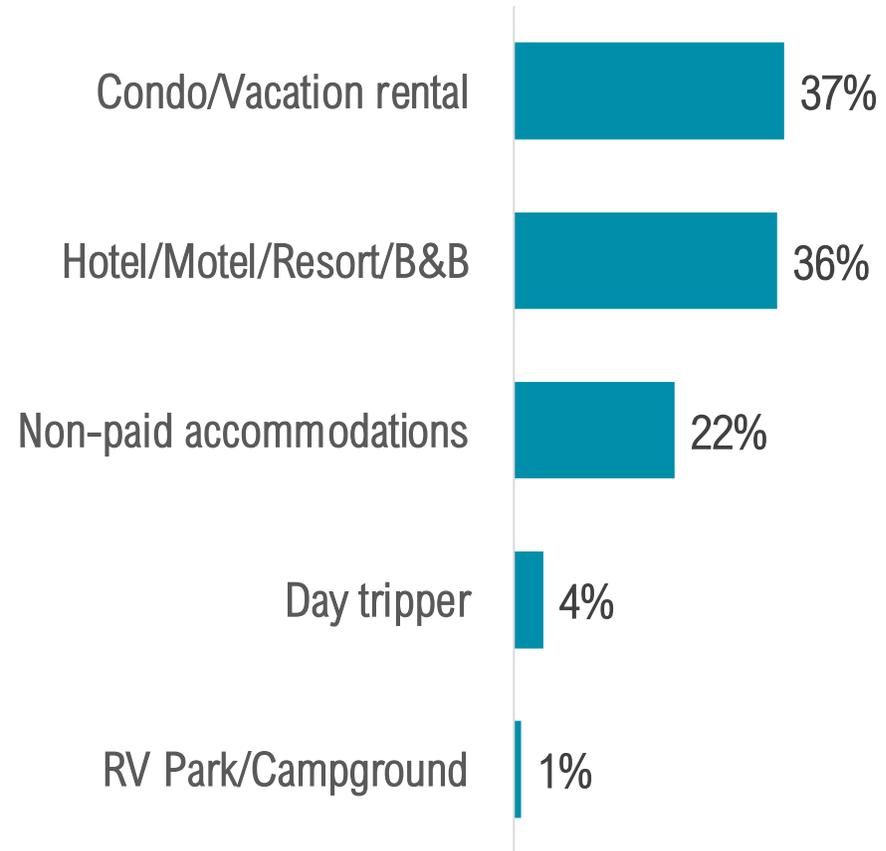
■ Male ■ Female

VISITOR JOURNEY: TRIP EXPERIENCE



ACCOMMODATIONS

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



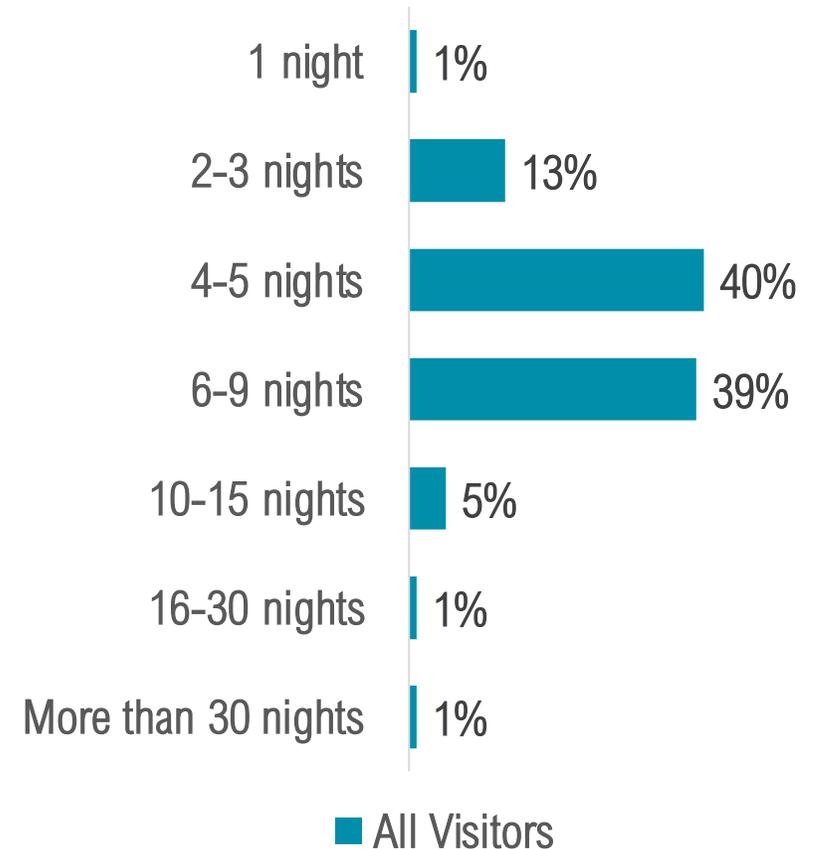
NIGHTS STAYED

All Visitors

Visitors spent **6.6¹ nights** in The Beaches of Fort Myers & Sanibel.

Visitors Staying in Paid Accommodations

Visitors staying in paid accommodations spent **5.8² nights** in The Beaches of Fort Myers & Sanibel.

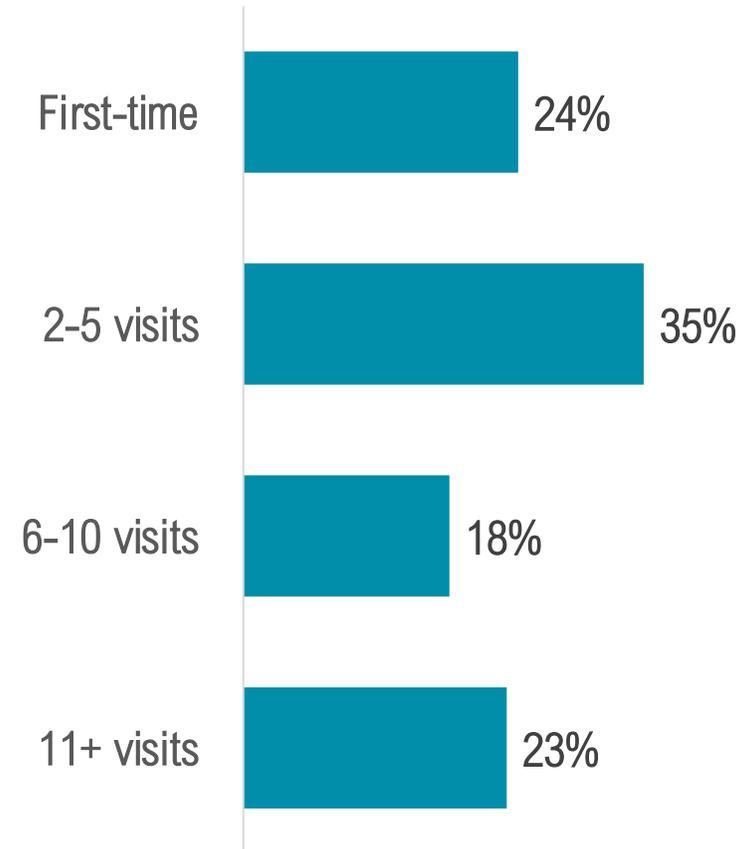


¹When including extended stay visitors, average nights stayed for all visitors was 7.2 nights.
Source: Visitor Tracking Survey

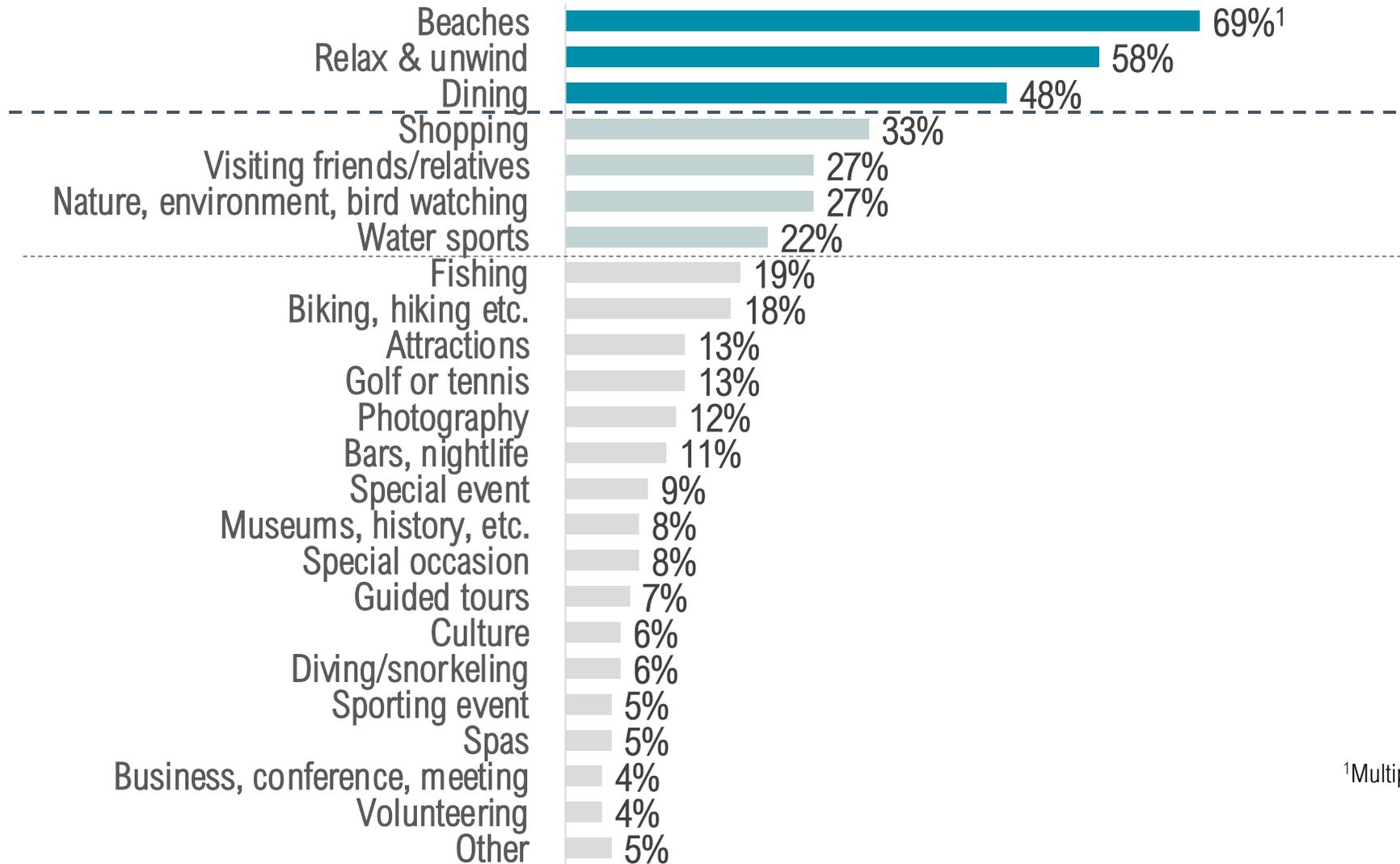
²When including extended stay visitors, average nights stayed for visitors staying in paid accommodations was 6.3 nights. Source: Visitor Tracking Survey

FIRST TIME AND EXPERIENCED VISITORS

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



VISITOR ACTIVITIES

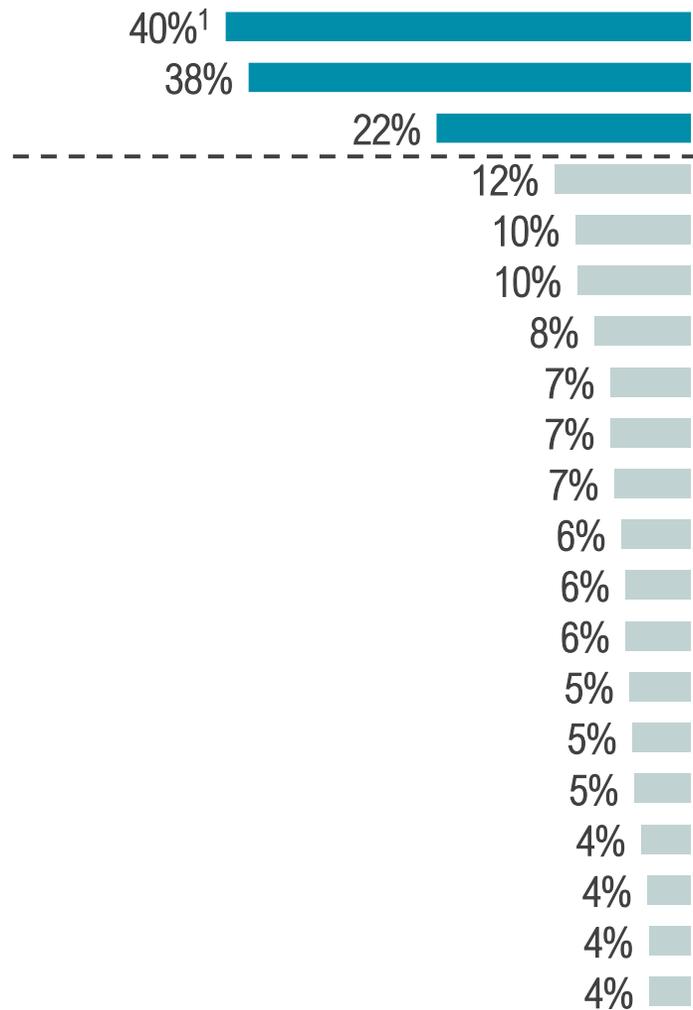


¹Multiple responses permitted.

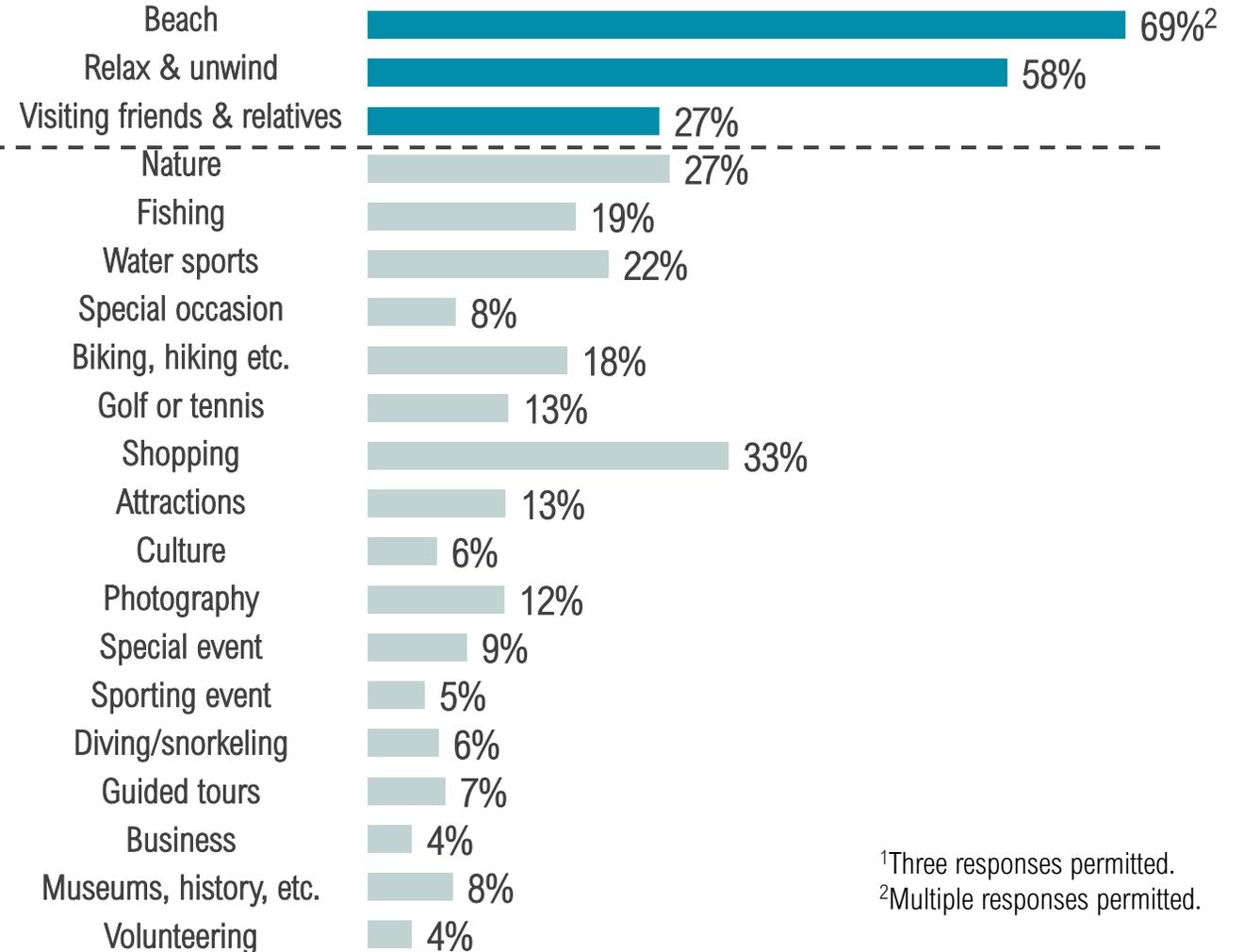
REASON FOR VISITING VS. VISITOR ACTIVITIES

Key Reasons for Visiting

Reason for Visiting



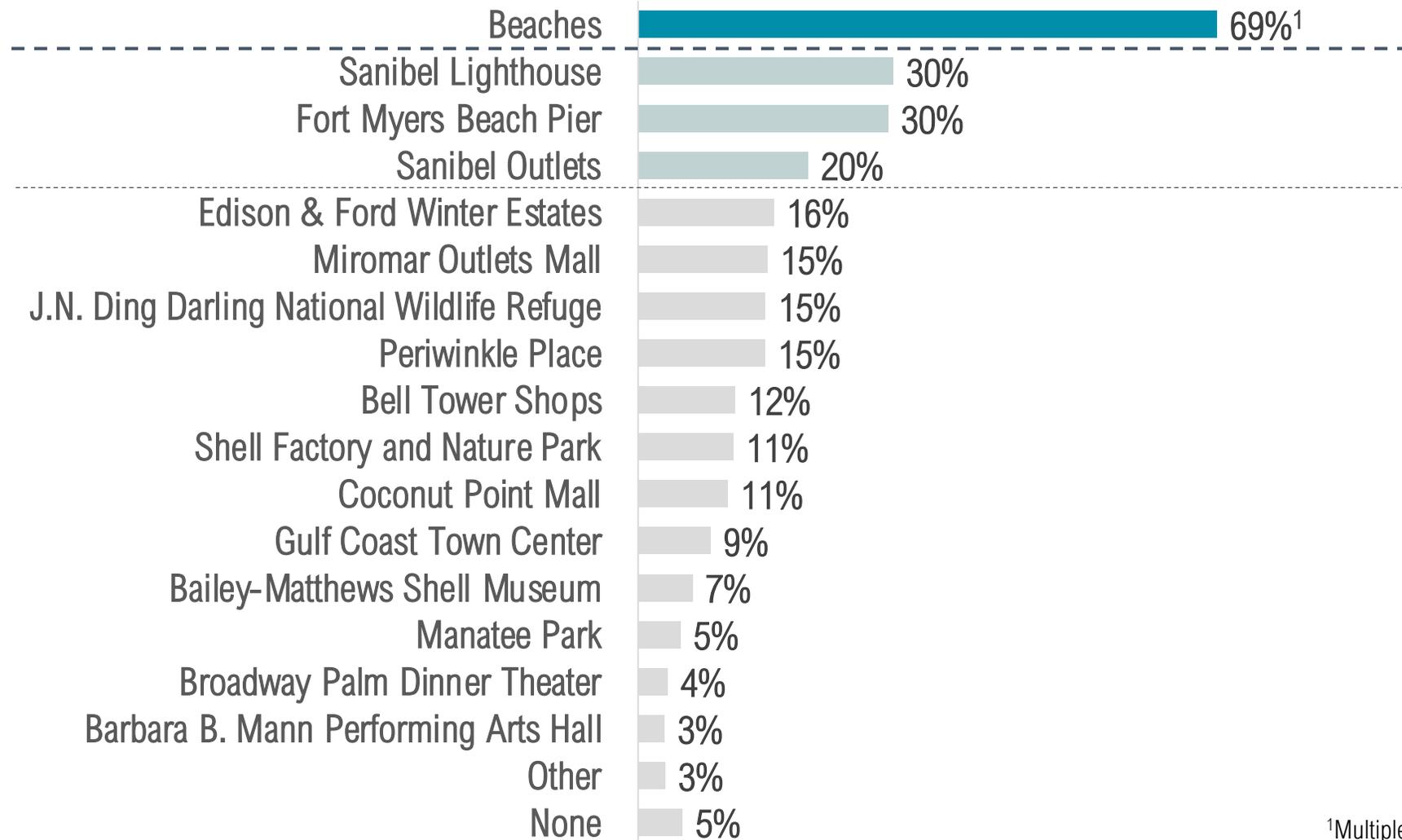
Visitor Activities



Trip Enhancements

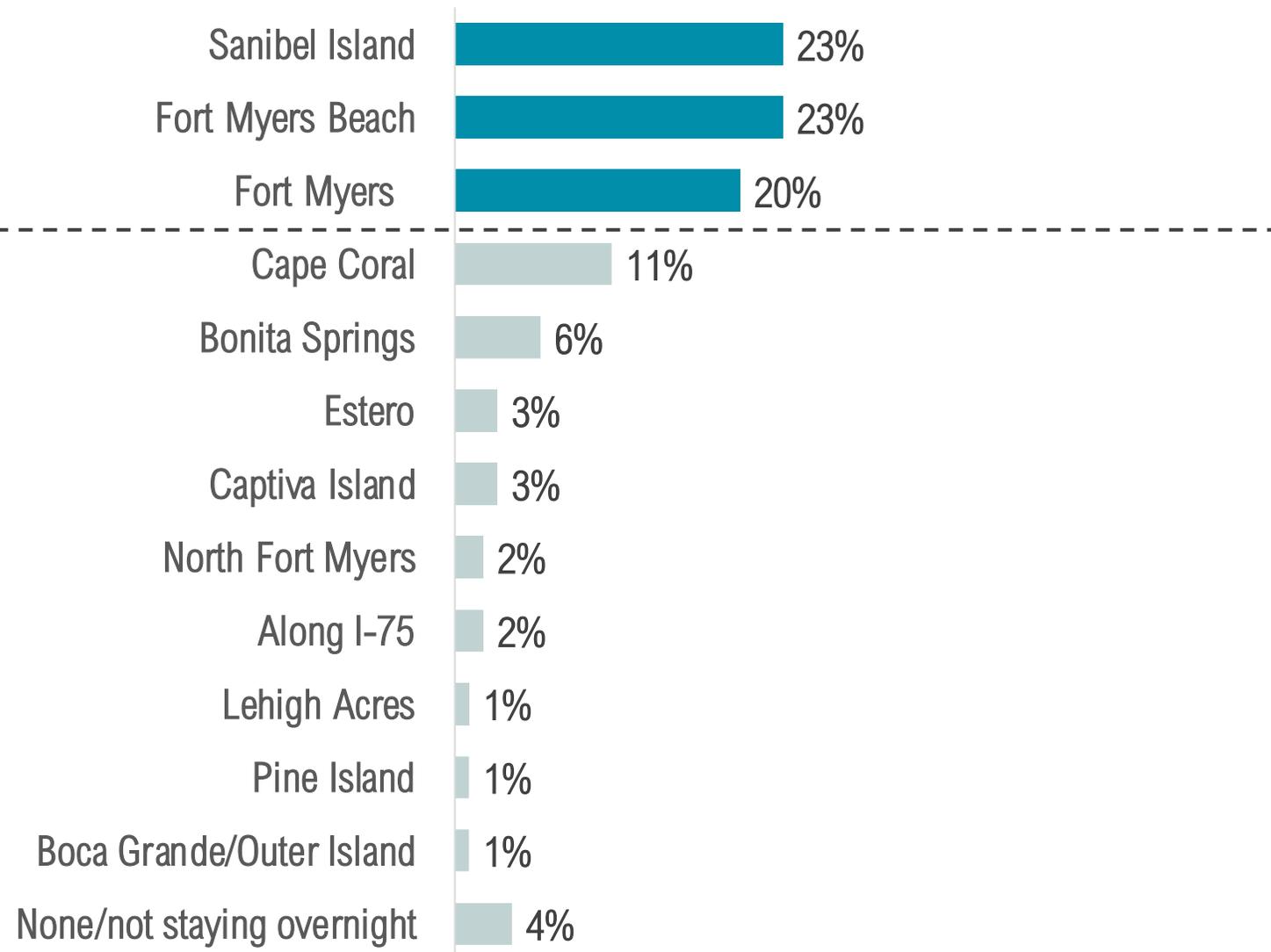
¹Three responses permitted.
²Multiple responses permitted.

ATTRACTIONS VISITED



¹Multiple responses permitted.

COMMUNITY STAYED

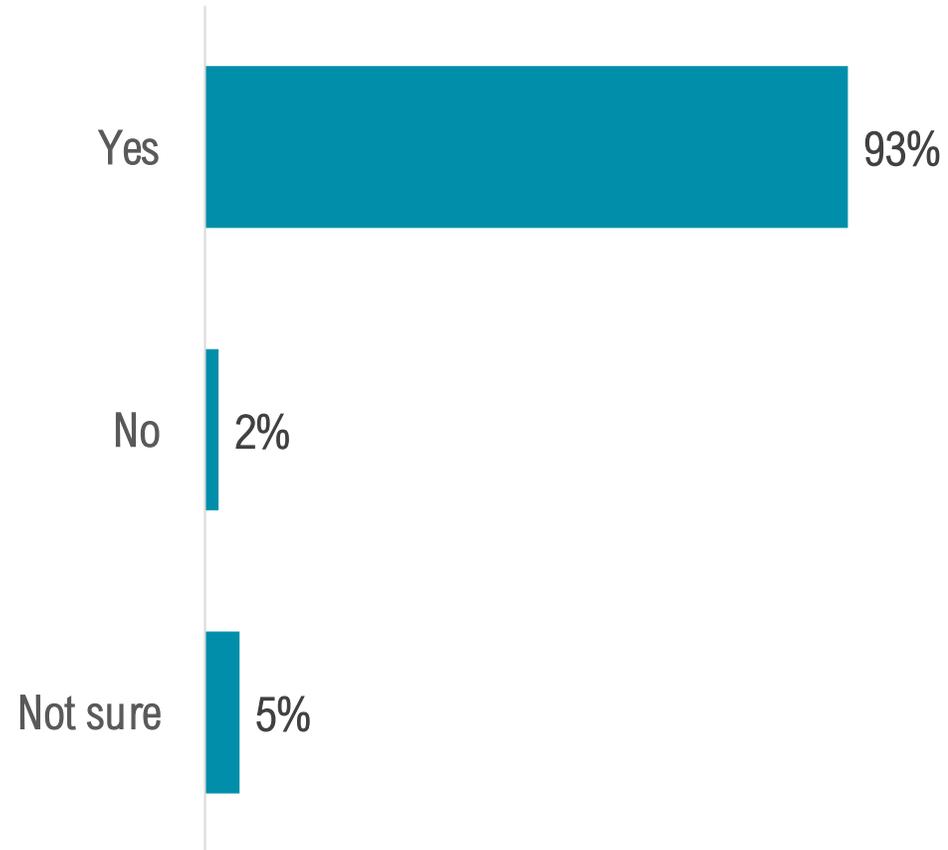


Travel Party Profile
Oct – Dec 2020

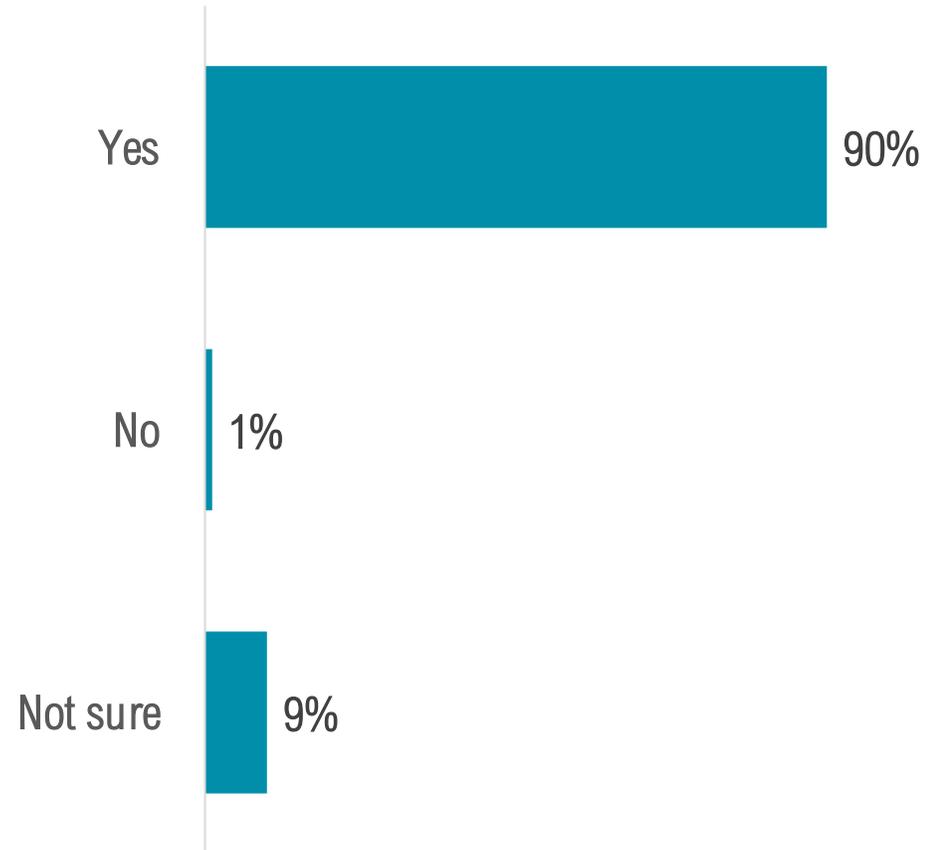
VISITOR JOURNEY: POST-TRIP EVALUATION



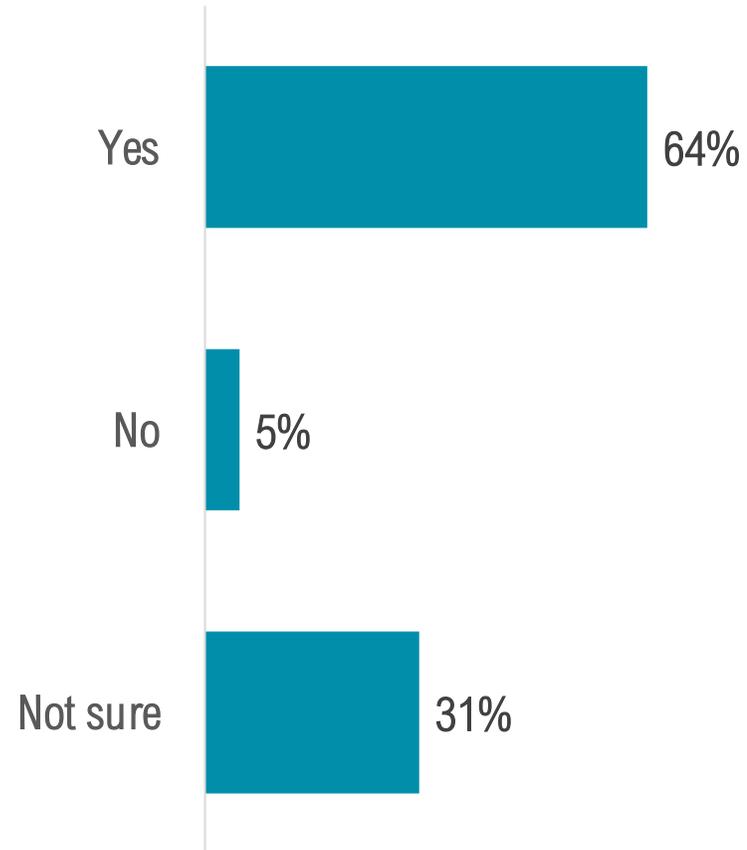
LIKELY TO RECOMMEND



LIKELY TO RETURN



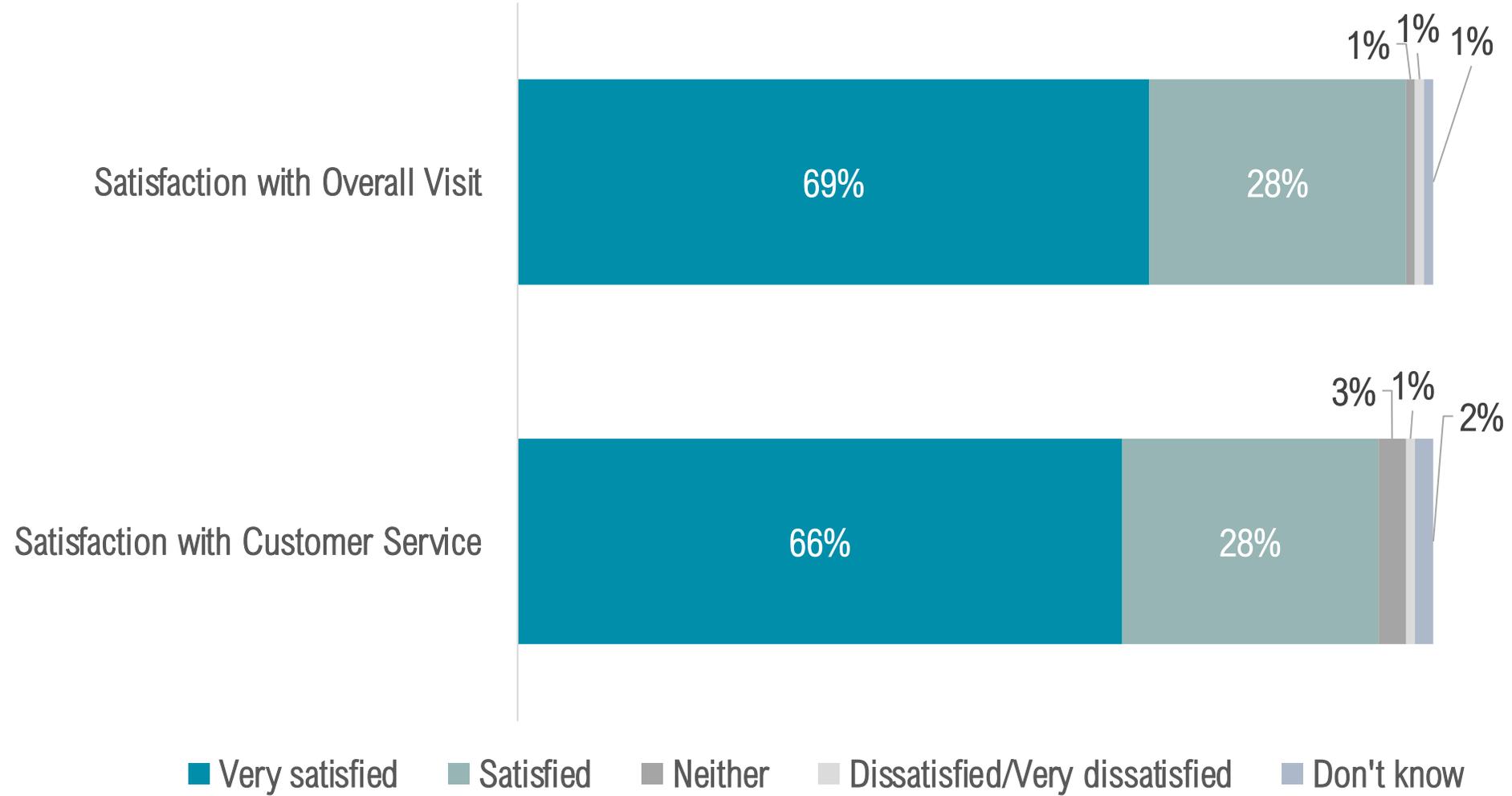
LIKELY TO RETURN NEXT YEAR



SATISFACTION RATINGS

	1 st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2019	2020	2019	2020	2019	2020	2019	2020
Likely to Recommend	90%	88%	95%	94%	92%	93%	95%	87%
Likely to Return	88%	79%	95%	94%	90%	89%	93%	71%
Likely to Return Next Year	34%	39%	69%	74%	52%	60%	66%	59%

SATISFACTION



SATISFACTION RATINGS: OVERALL VISIT

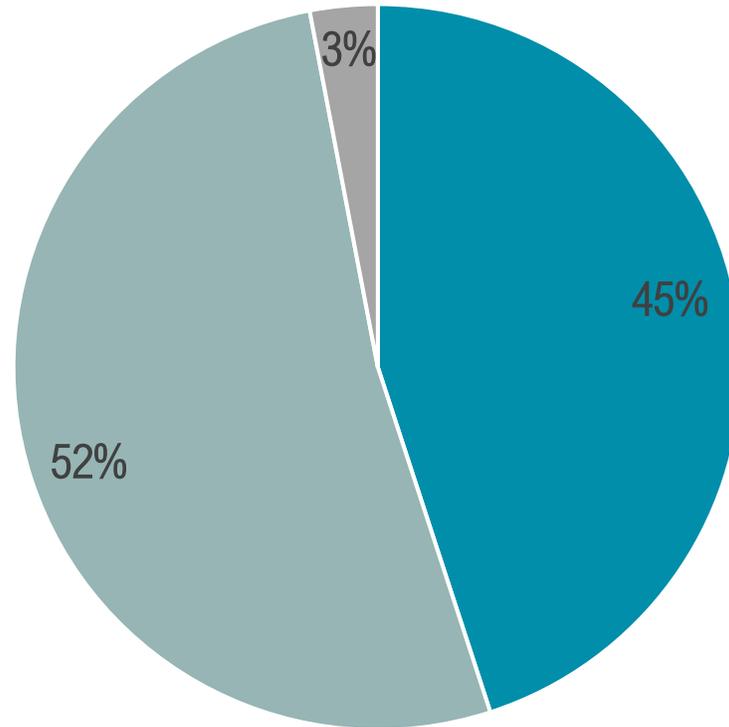
	1 st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2019	2020	2019	2020	2019	2020	2019	2020
Very Satisfied	68%	67%	66%	70%	65%	70%	80%	59%
Satisfied	27%	28%	30%	27%	31%	28%	16%	36%

SATISFACTION RATINGS: CUSTOMER SERVICE

	1 st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2019	2020	2019	2020	2019	2020	2019	2020
Very Satisfied	66%	67%	59%	65%	60%	66%	74%	56%
Satisfied	28%	25%	35%	29%	35%	29%	19%	34%

SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

Quality of Accommodations



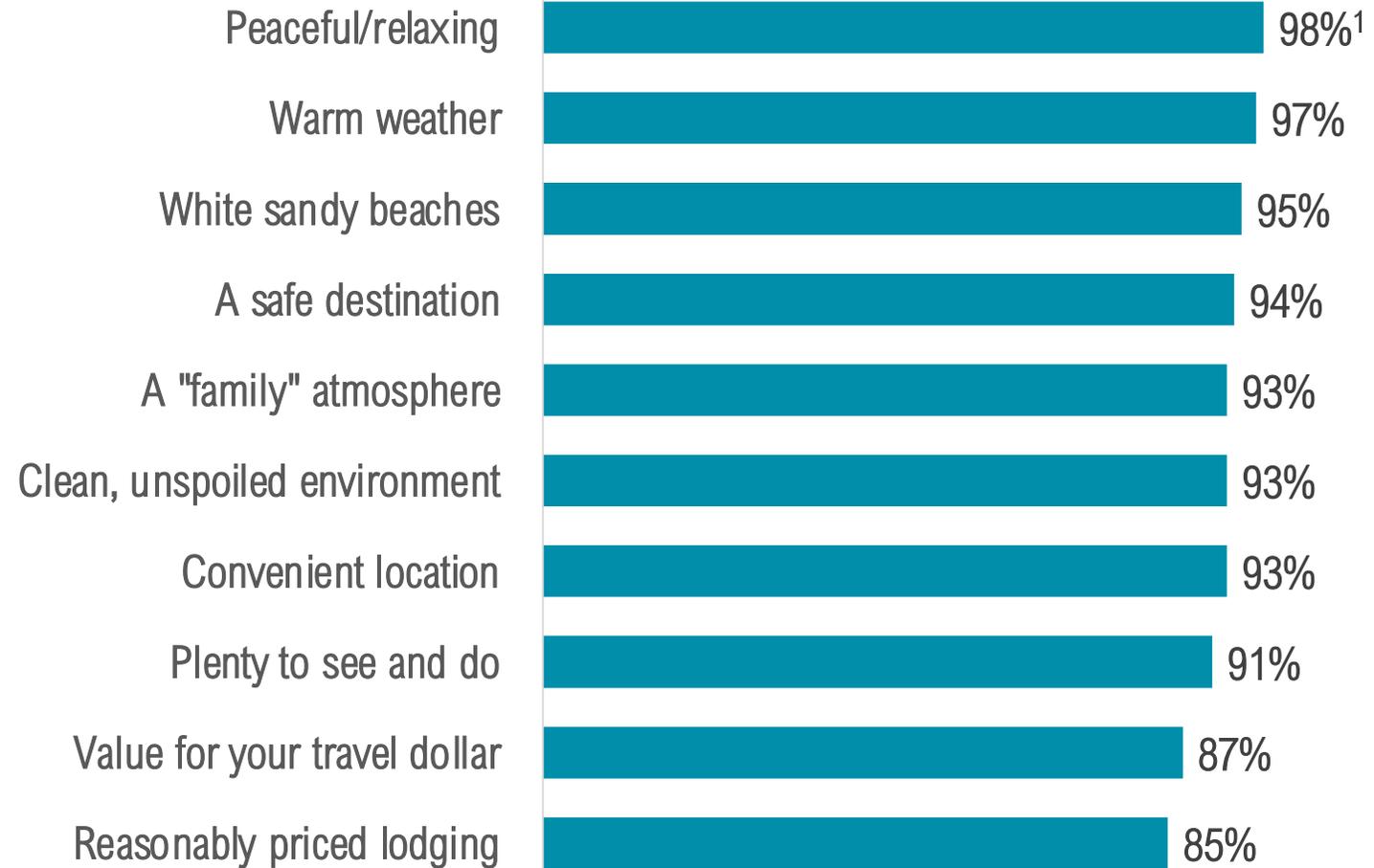
■ Exceeded expectations ■ Met expectations ■ Did not meet expectations

SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

	1 st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2019	2020	2019	2020	2019	2020	2019	2020
Exceeded Expectations	36%	49%	37%	44%	37%	46%	41%	33%
Met Expectations	61%	47%	62%	54%	62%	52%	55%	62%
Did Not Meet Expectations	3%	4%	1%	2%	1%	2%	4%	5%

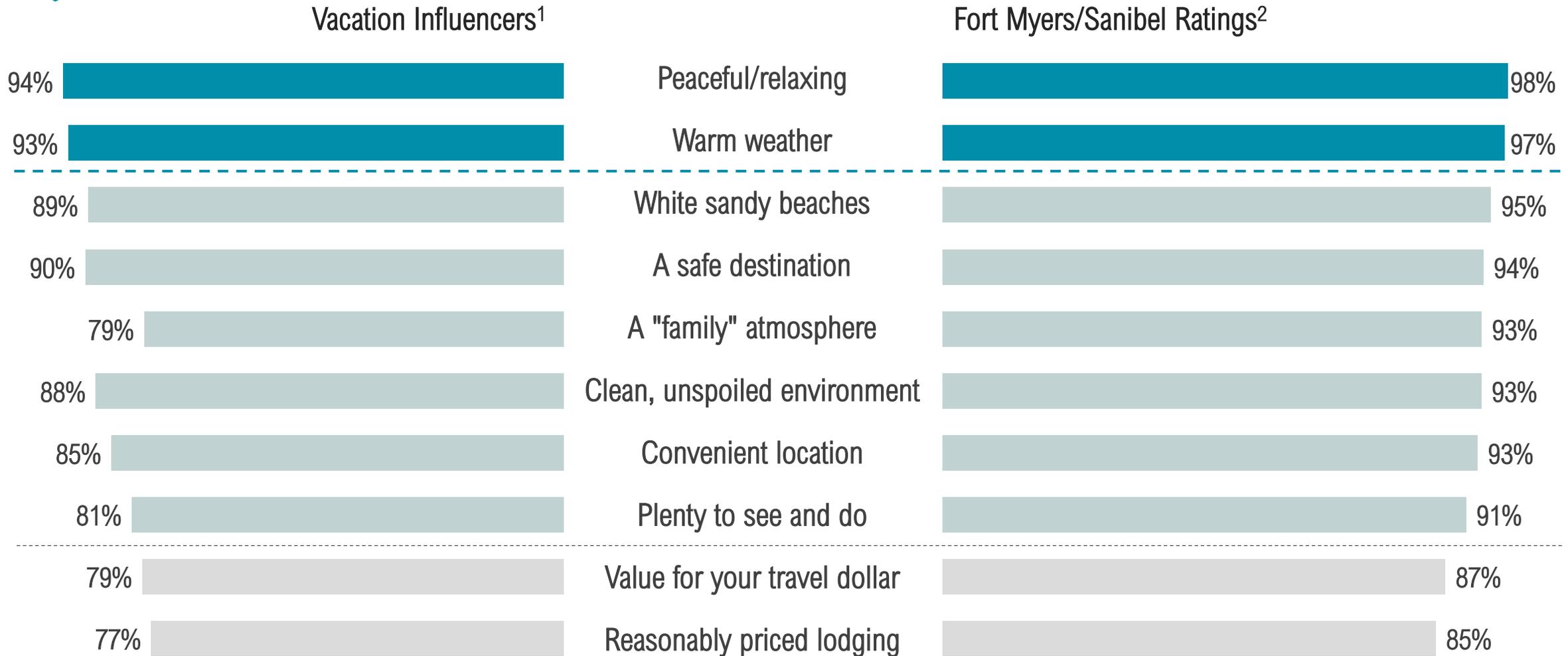
ATTRIBUTE RATINGS

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



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

VACATION ATTRIBUTE INFLUENCE VS. RATINGS

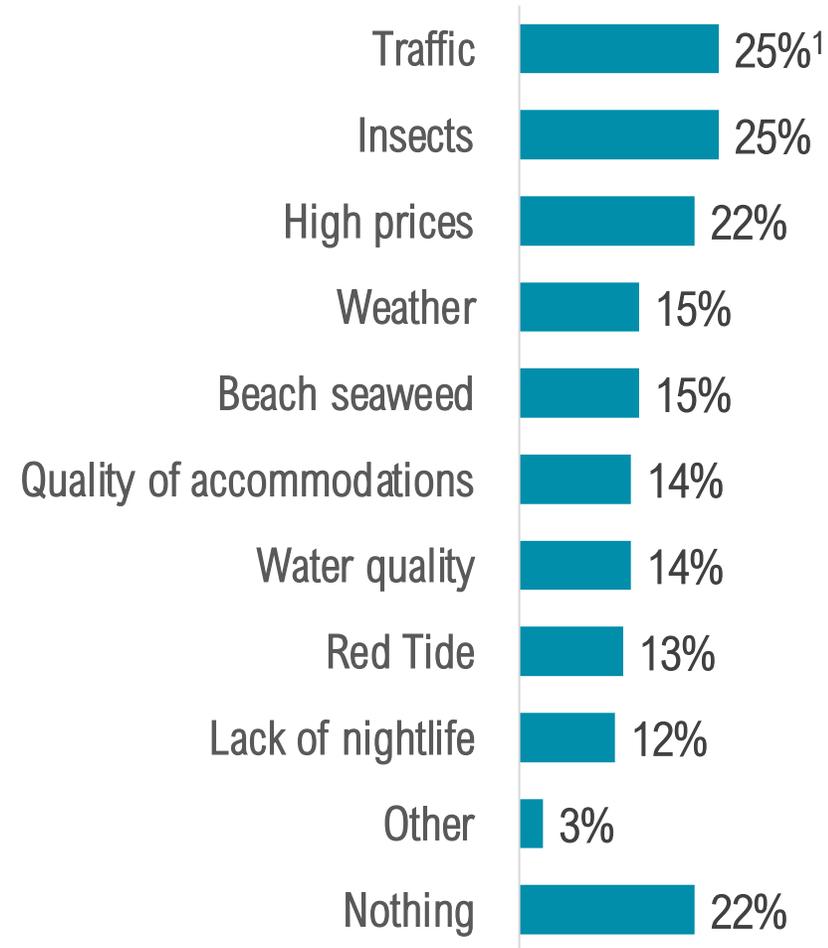


¹Top 2 box scores. Attributes rated on a scale from 1 to 5 where 1 is Not at All Influential and 5 is Definitely Influential.

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

VISITOR CONCERNS

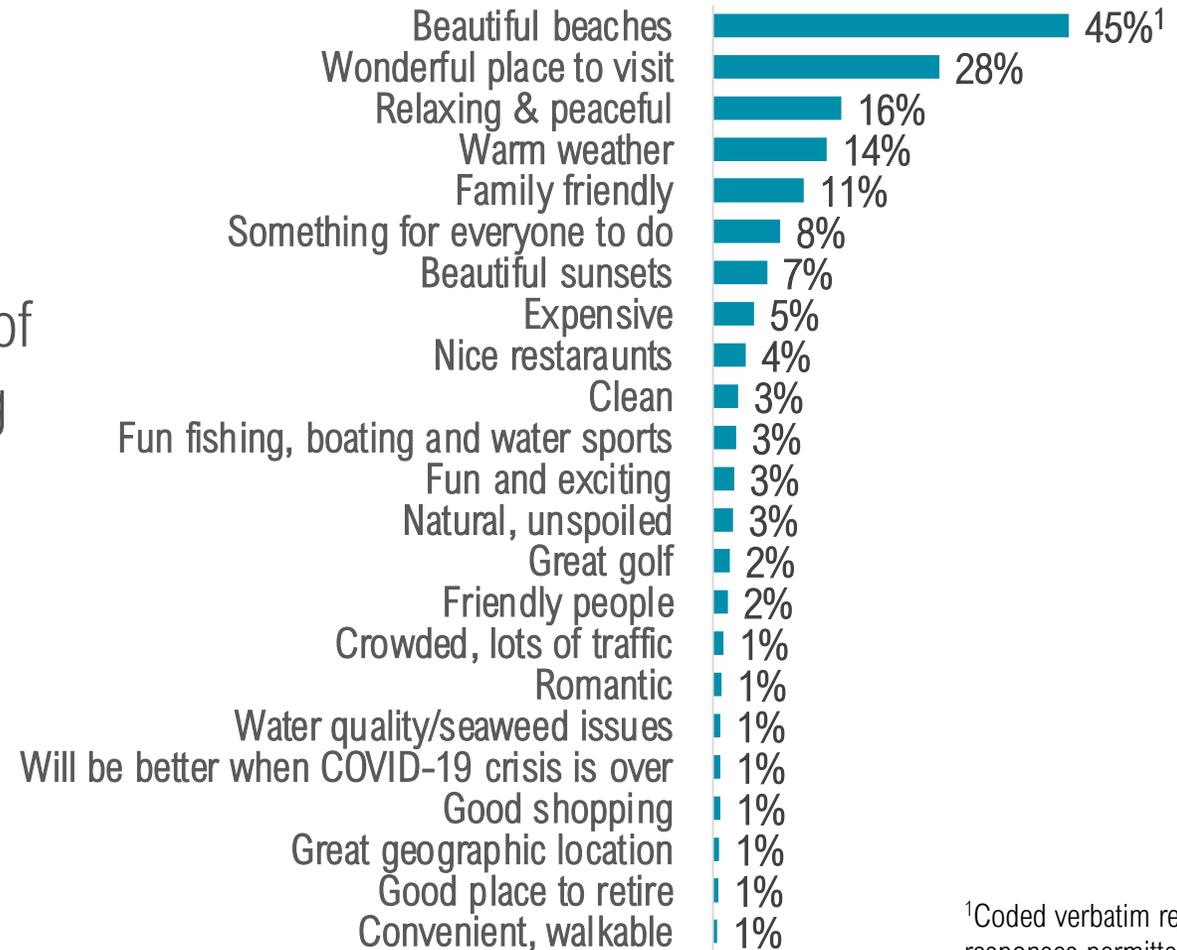
1 in 4 visitors were concerned about **traffic** and **insects** during their visit.



¹Multiple responses permitted.

AREA DESCRIPTIONS

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



¹Coded verbatim responses; multiple responses permitted.

AREA DESCRIPTIONS



Beautiful Beaches

- “Stellar beaches, great weather, family atmosphere.”
- “Gorgeous and beautiful area with unbelievable beaches and sunsets. Great restaurants.”
- “Beautiful area with gorgeous crystal-clear water and great fishing and snorkeling.”



Wonderful Place to Visit

- “Perfect vacation with great weather, awesome beaches, great boating.”
- “Our favorite vacation destination. Beautiful beaches, perfect weather, great boating.”
- “This place is our family vacation spot. I love coming here every year.”

AREA DESCRIPTIONS



Relaxing & Peaceful

- “Beautiful and relaxing. Natural environment without chain stores and restaurants. Great restaurants. Easy to navigate. Plenty of activities without the 'touristy' atmosphere.”
- “Great place to visit for calm beaches great for shelling.”
- “Quiet, family oriented, unspoiled by overdevelopment, eco friendly.”



Warm Weather

- “Perfect weather; not too hot, beautiful coastline, family atmosphere.”
- “The winter months here are perfect at the water.”
- “Great warm weather and plenty to do.”

OCCUPANCY BAROMETER: JANUARY – MARCH RESERVATIONS

Jan – March Reservations	Oct – Dec 2019	Oct – Dec 2020
Up	49%	3%
Same	45%	3%
Down	6%	92%
Not Sure	0%	2%

OCCUPANCY BAROMETER: APRIL – JUNE RESERVATIONS

April – June Reservations	Oct – Dec 2019	Oct – Dec 2020
Up	33%	13%
Same	63%	4%
Down	4%	81%
Not Sure	0%	2%

Year-Over-Year Comparisons



ECONOMIC IMPACT

Visitor & Lodging Statistics	Oct – Dec 2019	Oct – Dec 2020	% Change
Visitors	1,249,500	1,097,800	-12.1%
Room Nights	1,456,300	1,320,900	-12.3%
Direct Expenditures	\$743,544,500	\$644,054,500	-13.4%
Total Economic Impact	\$1,207,516,300	\$1,045,944,500	-13.4%
Occupancy	63.1%	57.2%	-9.4%
ADR	\$137.39	\$138.82	+1.0%
RevPAR	\$86.69	\$79.41	-8.4%

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM

	Oct – Dec 2019	Oct – Dec 2020	% Change
Direct Jobs	9,992	8,609	-13.8%
Total Jobs	13,974	12,048	-13.8%
Direct Wages	\$224,149,500	\$196,562,600	-12.3%
Total Wages	\$374,473,700	\$327,692,000	-12.5%
Direct Local Taxes	\$22,678,100	\$19,579,300	-13.7%
Total Local Taxes	\$40,814,100	\$34,934,500	-14.4%
Direct State Taxes	\$52,866,000	\$45,405,800	-14.1%
Total State Taxes	\$79,092,300	\$67,986,400	-14.0%

VISITOR TYPE

Visitor Type	Oct – Dec 2019	Oct – Dec 2020
Visitors in Paid Accommodations	68%	74%
Visitors in Non-Paid Accommodations	27%	22%
Day Trippers	5%	4%

PRE-VISIT

Planned trip in advance	Oct – Dec 2019	Oct – Dec 2020
1 week or less	6%	4%
2-4 weeks	9%	15%
1-2 months	15%	30%
3-6 months	34%	26%
6 months or more	30%	20%
Not sure	6%	5%

Considered Other Destinations	Oct – Dec 2019	Oct – Dec 2020
Yes	10%	18%
No	90%	82%

PRE-VISIT

Trip Planning Websites/Apps ¹	Oct – Dec 2019	Oct – Dec 2020
Airline websites/apps	36%	34%
Search engines	16%	27%
Hotel websites/apps	17%	22%
Booking websites/apps	15%	21%
Airbnb, VRBO, HomeAway	15%	19%
Vacation rental websites/apps	11%	18%
Trip Advisor	17%	16%
Beaches of Fort Myers & Sanibel Social Media	6%	13%
Facebook	6%	11%
Visit Florida	7%	10%
www.FortMyers-Sanibel.com	6%	10%
Travel reviews, blogs, stories, etc.	4%	9%
Instagram	1%	6%
YouTube, Hulu, Pandora	1%	6%
None/Don't visit websites	18%	15%
Other	6%	5%

¹Multiple responses permitted.

PRE-VISIT

Information Requests ¹	Oct – Dec 2019	Oct – Dec 2020
Call hotel/motel/condo	10%	28%
Visitor guide	3%	15%
Fort Myers-Sanibel E-newsletter	2%	12%
Call local Chamber of Commerce	2%	10%
Call VCB	1%	9%
None/Did not request info	79%	52%
Other	4%	3%

¹Multiple responses permitted.

PRE-VISIT

Recall of Lee County Promotions	Oct – Dec 2019	Oct – Dec 2020
Yes	30%	38%
No	56%	48%
Can't recall	15%	14%

Characteristics influencing decision to visit Lee County (top 2 boxes)	Oct – Dec 2019	Oct – Dec 2020
Peaceful/relaxing	88%	94%
Warm weather	89%	93%
A safe destination	84%	90%
White sandy beaches	82%	89%
Clean, unspoiled environment	80%	88%
Convenient location	79%	85%
Plenty to see and do	76%	81%
Value for your travel dollar	74%	79%
A "family" atmosphere	73%	79%
Reasonably priced lodging	69%	77%

PRE-VISIT

Transportation	Oct – Dec 2019	Oct – Dec 2020
Fly	70%	65%
Drive a personal vehicle	24%	27%
Drive a rental vehicle	4%	4%
Drive a RV	1%	3%
Travel by bus	1%	0%
Other	1%	1%

Airport Used	Oct – Dec 2019	Oct – Dec 2020
Southwest Florida International	69%	77%
Punta Gorda	10%	10%
Ft. Lauderdale International	9%	6%
Tampa International	4%	3%
Miami International	4%	2%
Orlando International	4%	2%
Other	1%	0%

TRAVEL PARTY PROFILE

Visitor Origin	Oct – Dec 2019	Oct – Dec 2020
Florida	10%	10%
Southeast	16%	19%
Northeast	18%	15%
Midwest	37%	42%
West	6%	10%
Canada	3%	2%
United Kingdom	2%	<1%
Germany	5%	1%
Other Europe	2%	<1%
Other international	1%	<1%

Visitor Origin	Oct – Dec 2019	Oct – Dec 2020
New York City	5%	5%
Chicago	4%	5%
Indianapolis	3%	3%
Detroit	3%	3%
Washington DC-Baltimore	2%	3%
Milwaukee	1%	3%

TRAVEL PARTY PROFILE

Travel Parties	Oct – Dec 2019	Oct – Dec 2020
Mean travel party size	2.9 ¹	3.4 ¹
Travel with children under age 18	21%	29%

Travel Party Composition	Oct – Dec 2019	Oct – Dec 2020
Family	30%	40%
Couple	44%	36%
Single	15%	9%
Group of couples/friends	9%	9%
With business associates	2%	5%
In a tour group	1%	1%

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

TRAVEL PARTY PROFILE

Marital Status	Oct – Dec 2019	Oct – Dec 2020
Married	73%	74%
Single	22%	23%
Other	5%	3%

Age	Oct – Dec 2019	Oct – Dec 2020
Average age	52	52

Household Income	Oct – Dec 2019	Oct – Dec 2020
Median Income	\$114,500	\$106,000

TRIP EXPERIENCE

Length of Stay	Oct – Dec 2019	Oct – Dec 2020
Average nights in The Beaches of Fort Myers & Sanibel	7.8	6.6

First time/Repeat Visitors	Oct – Dec 2019	Oct – Dec 2020
First-time	20%	24%
Repeat	80%	76%

TRIP EXPERIENCE

Activities ¹	Oct – Dec 2019	Oct – Dec 2020
Beaches	67%	69%
Relax & unwind	61%	58%
Dining	60%	48%
Shopping	40%	33%
Nature, environment, bird watching	38%	27%
Visiting friends/relatives	29%	27%
Water sports	16%	22%
Fishing	11%	19%
Biking, hiking etc.	18%	18%
Attractions	21%	13%
Golf or tennis	12%	13%
Photography	15%	12%
Bars, nightlife	12%	11%
Special event	9%	9%
Museums, history, etc.	9%	8%
Special occasion	7%	8%
Guided tours	7%	7%
Culture	9%	6%
Diving/snorkeling	2%	6%
Sporting event	6%	5%
Spas	4%	5%
Volunteering	1%	4%
Business conference or meeting	3%	4%
Other	3%	5%

¹Multiple responses permitted.

TRIP EXPERIENCE

Attractions ¹	Oct – Dec 2019	Oct – Dec 2020
Beaches	67%	69%
Fort Myers Beach Pier	32%	30%
Sanibel Lighthouse	30%	30%
Sanibel Outlets	19%	20%
Edison & Ford Winter Estates	24%	16%
Miromar Outlets Mall	20%	15%
J.N. Ding Darling National Wildlife Refuge	16%	15%
Periwinkle Place	14%	15%
Bell Tower Shops	7%	12%
Shell Factory and Nature Park	8%	11%
Coconut Point Mall	6%	11%
Gulf Coast Town Center	6%	9%
Bailey-Matthews Shell Museum	2%	7%
Manatee Park	3%	5%
Broadway Palm Dinner Theater	3%	4%
Barbara B. Mann Performing Arts Hall	2%	3%
None	10%	5%
Other	4%	3%

¹Multiple responses permitted.

TRIP EXPERIENCE

Area stayed	Oct – Dec 2019	Oct – Dec 2020
Sanibel Island	22%	23%
Fort Myers Beach	20%	23%
Fort Myers	22%	20%
Cape Coral	15%	11%
Bonita Springs	5%	6%
Captiva Island	3%	3%
Estero	2%	3%
North Fort Myers	2%	2%
Along I-75	1%	2%
Lehigh Acres	1%	1%
Pine Island	1%	1%
Boca Grande/Outer Island	1%	1%
None/not staying overnight	5%	4%

POST-TRIP EVALUATION

Loyalty metrics	Oct – Dec 2019	Oct – Dec 2020
Likely to recommend	93%	93%
Likely to return	93%	90%
Likely to return next year	63%	64%

Satisfaction with Accommodations	Oct – Dec 2019	Oct – Dec 2020
Exceeded expectations	38%	45%
Met expectations	60%	52%
Did not meet expectations	2%	3%

POST-TRIP EVALUATION

Satisfaction with Visit	Oct – Dec 2019	Oct – Dec 2020
Very satisfied	67%	69%
Satisfied	29%	28%
Neither	2%	1%
Dissatisfied/Very dissatisfied	1%	1%
Don't know	2%	1%

Satisfaction with Customer Service	Oct – Dec 2019	Oct – Dec 2020
Very satisfied	60%	66%
Satisfied	33%	28%
Neither	2%	3%
Dissatisfied/Very dissatisfied	0%	1%
Don't know	4%	2%

POST-TRIP EVALUATION

Visitor Concerns ¹	Oct – Dec 2019	Oct – Dec 2020
Traffic	20%	25%
Insects	13%	25%
High prices	8%	22%
Nothing	32%	22%
Beach seaweed	12%	15%
Weather	6%	15%
Water quality	16%	14%
Quality of accommodations	2%	14%
Red Tide	25%	13%
Lack of nightlife	2%	12%
Other	3%	3%

¹Multiple responses permitted.

Methodology



METHODOLOGY

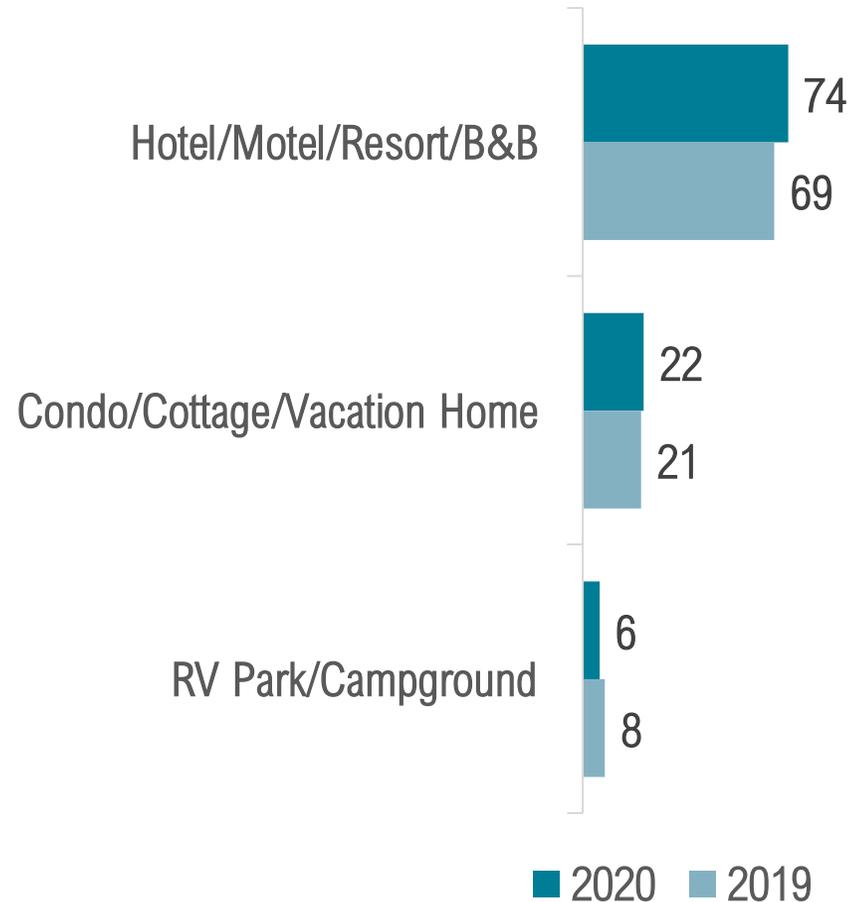
- Economic Impact of tourism in Lee County is derived from:
 - Visitor Tracking Study
 - Internet survey & in-person interviews in public areas, hotels, & at events around Lee County
 - Sample size: 1,110 completed interviews
 - Target individuals: Oct – Dec visitors to Lee County
 - Data Collection: October 2020 – December 2020
 - 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 – 102 completed interviews
 - Data Collection: January 2021 (for Oct – Dec 2020)
- Total Sample Size – data from 8,782 hotel/rental/campground units reporting to DSG, 10,269 hotel units reporting to STR (representing 86 properties), and 15,892 rental unit listings on Key Data

Number of Interviews



METHODOLOGY

- 1,110 visitor interviews were completed in the following areas:



The Beaches of Fort Myers & Sanibel

Lee County VCB

Oct – Dec 2020

Visitor Tracking & Occupancy Study

Tamara Pigott, CDME
Executive Director

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

