The Beaches of Fort Myers & Sanibel

Lee County VCB

Oct – Dec 2019
Visitor Tracking, Occupancy & Economic Impact Study

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Downs & St. Germain Research

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Introduction

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Study Objectives: Map the Visitor Journey

Pre-Visit

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

Travel Party Profile

- Visitor origin
- Party size
- Party composition
- Demographics

Trip Experience

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

Post-Trip Evaluation

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

Economic Impact on Destination

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

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Executive Summary

Visitor Journey: Economic Impact on Destination

Pre-Visit → Travel Party Profile → Trip Experience → Post-Trip Evaluation → **Economic Impact on Destination**
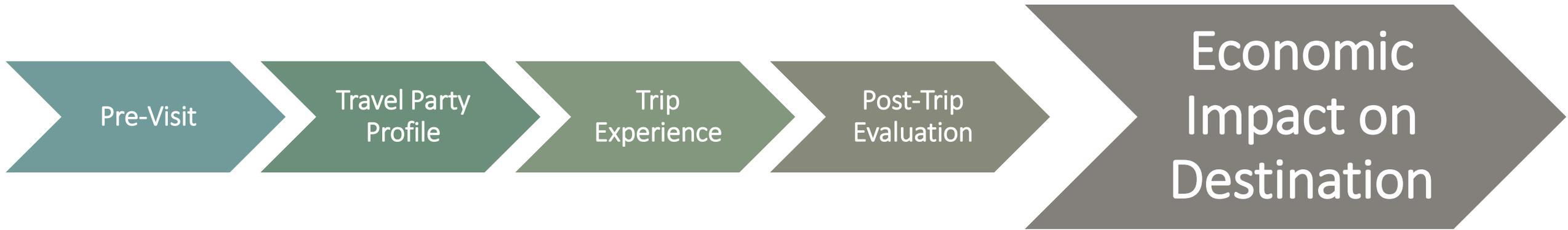
Oct – Dec 2019

Tourism Snapshot: Oct – Dec 2019[1]

Visitor & Lodging Statistics	Oct – Dec 2018	Oct – Dec 2019	% Change
Visitors	1,099,800	1,249,500	+13.6%
Room Nights	1,296,000	1,456,300	+12.4%
Direct Expenditures[2]	$684,181,400	$743,544,500	+8.7%
Total Economic Impact[3]	$1,111,110,600	$1,207,516,300	+8.7%

[1] The levels of increases from 2018 to 2019 were relatively high in no small amount due to water quality issues last year, which depressed metrics. Plus, available inventory for visitors was up 13.8% in October to December 2019 compared to 2018.
[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.

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Changes in Tourism Metrics: Oct – Dec 2017 - 2019[1]

Visitor & Lodging Statistics	Oct – Dec 2018 vs. 2017	Oct – Dec 2019 vs. 2018	Oct – Dec 2019 vs. 2017[2]
Visitors	-3.4%	+13.6%	+9.7%
Room Nights	-5.5%	12.4%	+6.2%
Direct Expenditures[3]	-3.3%	+8.7%	+5.1%
Total Economic Impact[4]	-3.3%	+8.7%	+5.1%

[1] Percentage changes over the past two years were affected by water quality issues in 2018, hence significant decreases in 2018 followed by significant increases in 2019. The annual change across the two years is shown in the last column. These figures show a clearer picture of the last two years.
[2] Annual change from 2017 to 2019.
[3] Includes: accommodations, restaurants, entertainment, shopping, transportation, groceries, and "other" expenses.
[4] 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.

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Economic Impact on Destination
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Tourism Snapshot: Calendar Year-to-Date 2019[1]

Visitor & Lodging Statistics	CYTD 2018	CYTD 2019	% Change
Visitors	4,793,800	4,926,400	+2.8%
Room Nights	5,290,750	5,638,700	+6.6%
Direct Expenditures[2]	$3,116,791,500	$3,272,030,100	+5.0%
Total Economic Impact[3]	$5,061,669,400	$5,313,776,600	+5.0%

[1] Year-over-year differences due to: 1. more available inventory in 2019 and 2. differences in methodology impacting data collection, estimates for visitors staying in non-paid accommodations and day trippers.

[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.

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Economic Impact on Destination
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Oct – Dec Lodging Statistics

63.1%
Occupancy
⬆2.1%

$137.39
ADR
⬆12.9%

$86.69
RevPAR
⬆15.3%

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Economic Impact on Destination
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Visitor Journey: Pre-Visit

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

Pre-Visit
Oct – Dec 2019

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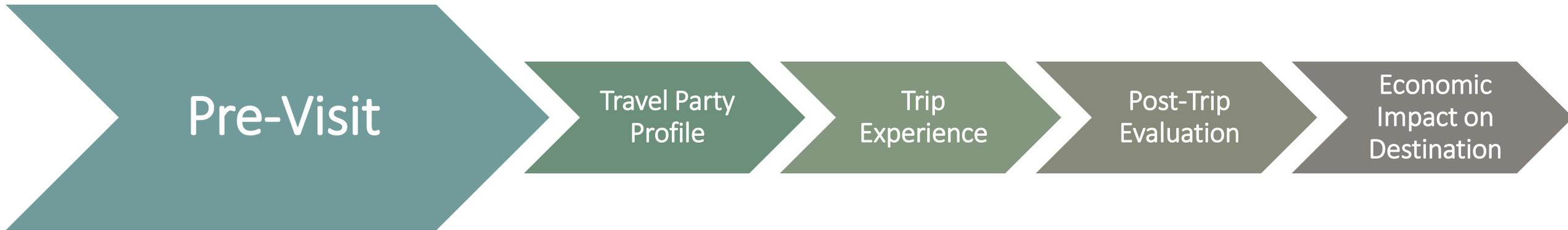
Trip Planning

→ Nearly **2 in 3** visitors planned their trip to The Beaches of Fort Myers & Sanibel at least 3 months in advance

→ **2 in 10** visitors requested information from hotels, the VCB, etc., to plan their trip

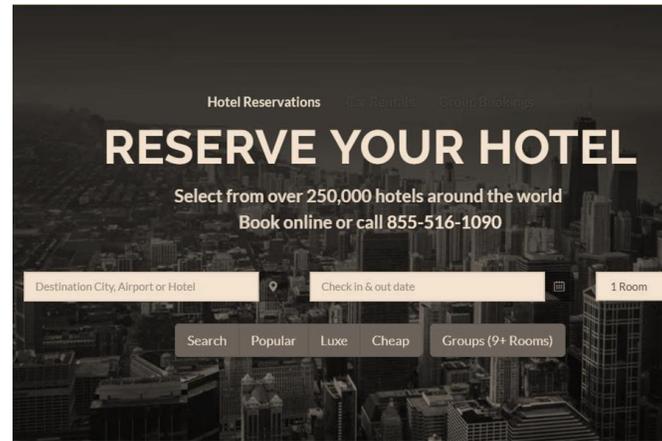→ **10%** of visitors considered choosing other destinations when planning their trips

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Trip Planning: Websites Used

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

→ Top websites used to plan their trip include[1]:

36% Airline websites

17% Hotel websites

17% Trip Advisor

[1]Multiple responses permitted.

Top Trip Influencers

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

89% Warm weather

88% Peaceful/relaxing

84% Safe destination

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

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Top Reasons for Visiting

→Visitors' top reasons for visiting The Beaches of Fort Myers & Sanibel include[1]:

55% Vacation

38% Beach

38% Relax & unwind

25% Visit friends & relatives

[1]Three responses permitted.

Promotions

→ **30%** of visitors recalled promotions in the past 6 months for The Beaches of Fort Myers & Sanibel

→ Top sources of recall include[1]:

33% Internet

28% Social media

17% TV

[1]Multiple responses permitted.

Booking

→Visitors used the following to book their trips:

46% Directly with hotel

16% Other online travel agency

14% VRBO, HomeAway

12% Vacation rental company

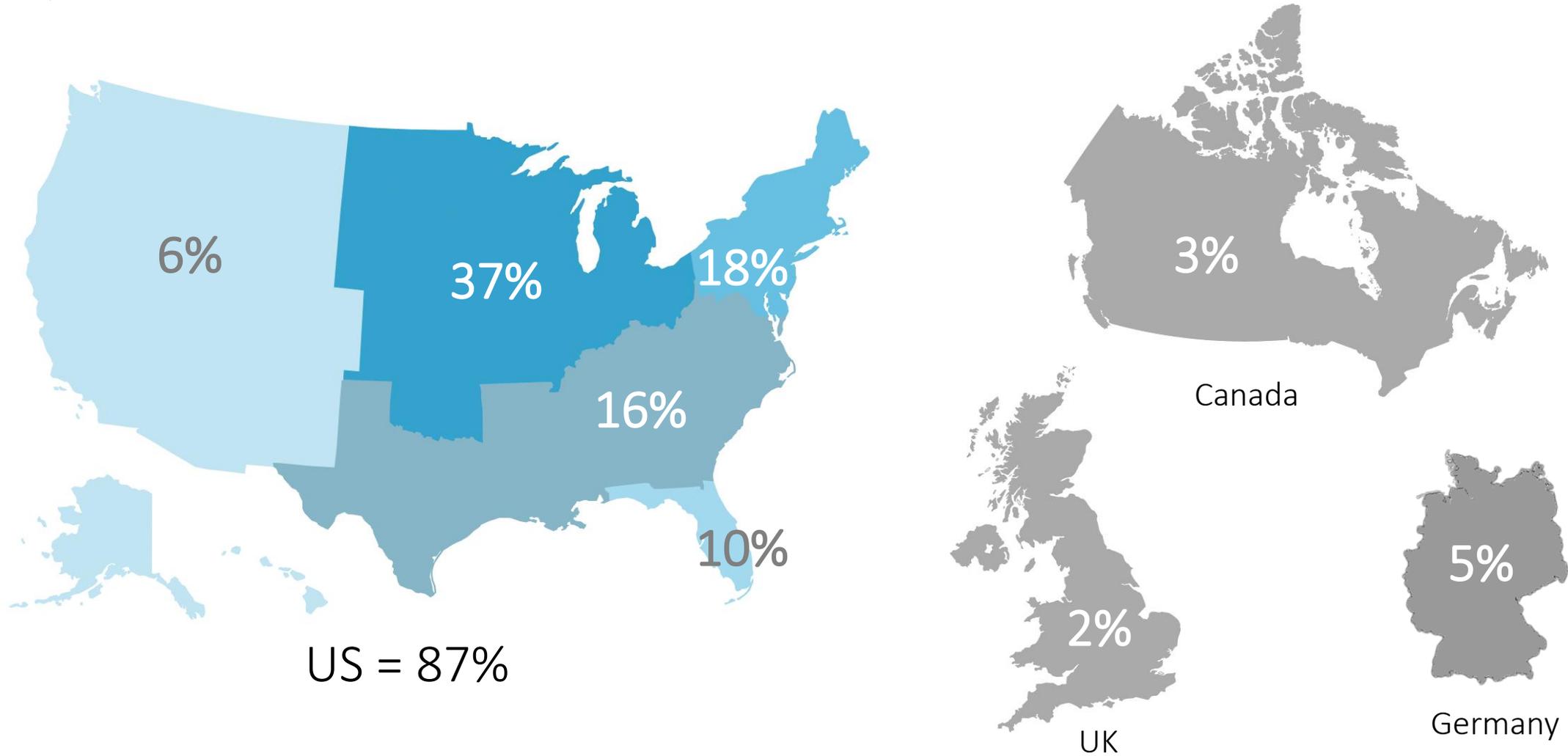**8% Airbnb**

Transportation

→ **70%** of visitors flew to The Beaches of Fort Myers & Sanibel

→ **69%** of visitors who flew to The Beaches of Fort Myers & Sanibel flew to RSW

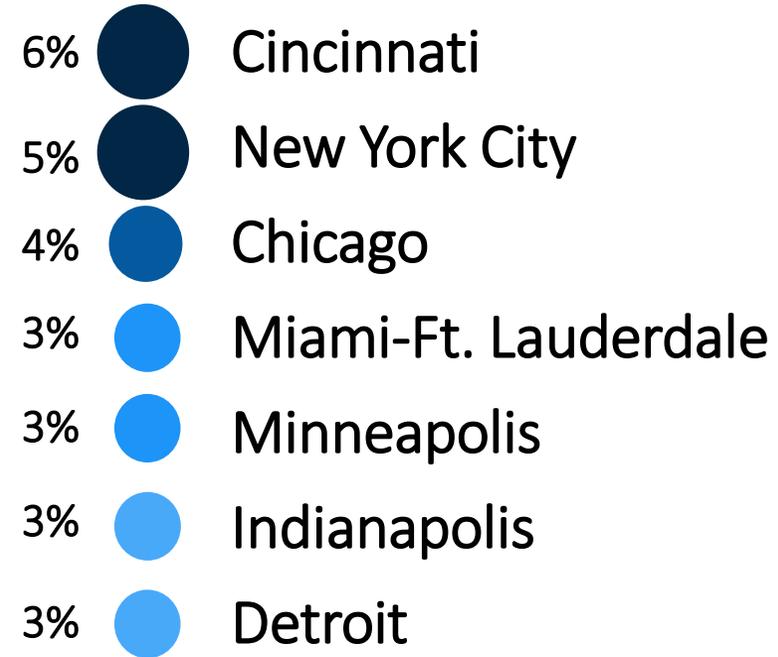# Visitor Journey: Travel Party Profile

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

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Travel Party Profile
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Origin

6%

37%

18%

16%

10%

US = 87%

3%

Canada

2%

UK

5%

Germany

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Travel Party Profile
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Top Origin Markets

6% Cincinnati

5% New York City

4% Chicago

3% Miami-Ft. Lauderdale

3% Minneapolis

3% Indianapolis

3% Detroit

Travel Party Profile
Oct – Dec 2019

Travel Party Size and Composition

→Visitors traveled in a party composed of **2.9 people**[1]

→**21%** traveled with children under the age of 18

→**43%** traveled as a couple, while **30%** of visitors traveled as a family

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

Demographic Profile

Oct – Dec Visitors:

→ Average age of 52 years old

→ Median household income of $114,500

→ Married (73%)

→ College educated (66%)

→ Caucasian/white (76%)

→ Female (57%)

Travel Party Profile
Oct – Dec 2019

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Visitor Journey: Trip Experience

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

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Trip Experience
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Accommodations

36% Hotel/Motel/Resort/B&B

30% Condo/Vacation Rental

27% Non-paid Accommodations

5% Day trippers

2% RV Park/Campground

Length of Stay & Number of Times in Destination

→Visitors[1] spent **7.8 nights** in The Beaches of Fort Myers & Sanibel

→**20%** were first time visitors

→**30%** have visited more than 10 times

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

Visitor Activities

→Top visitor activities include[1]:

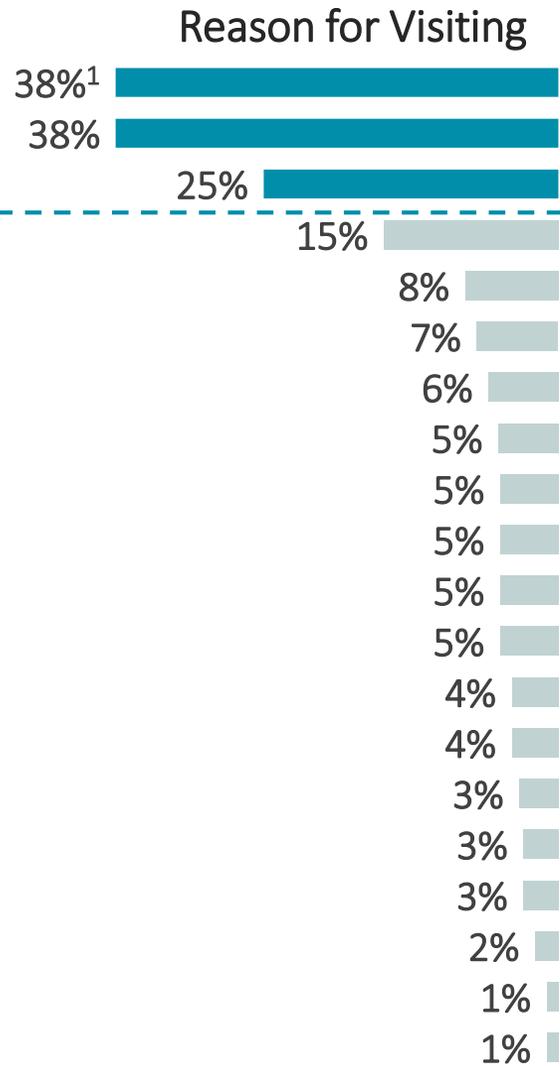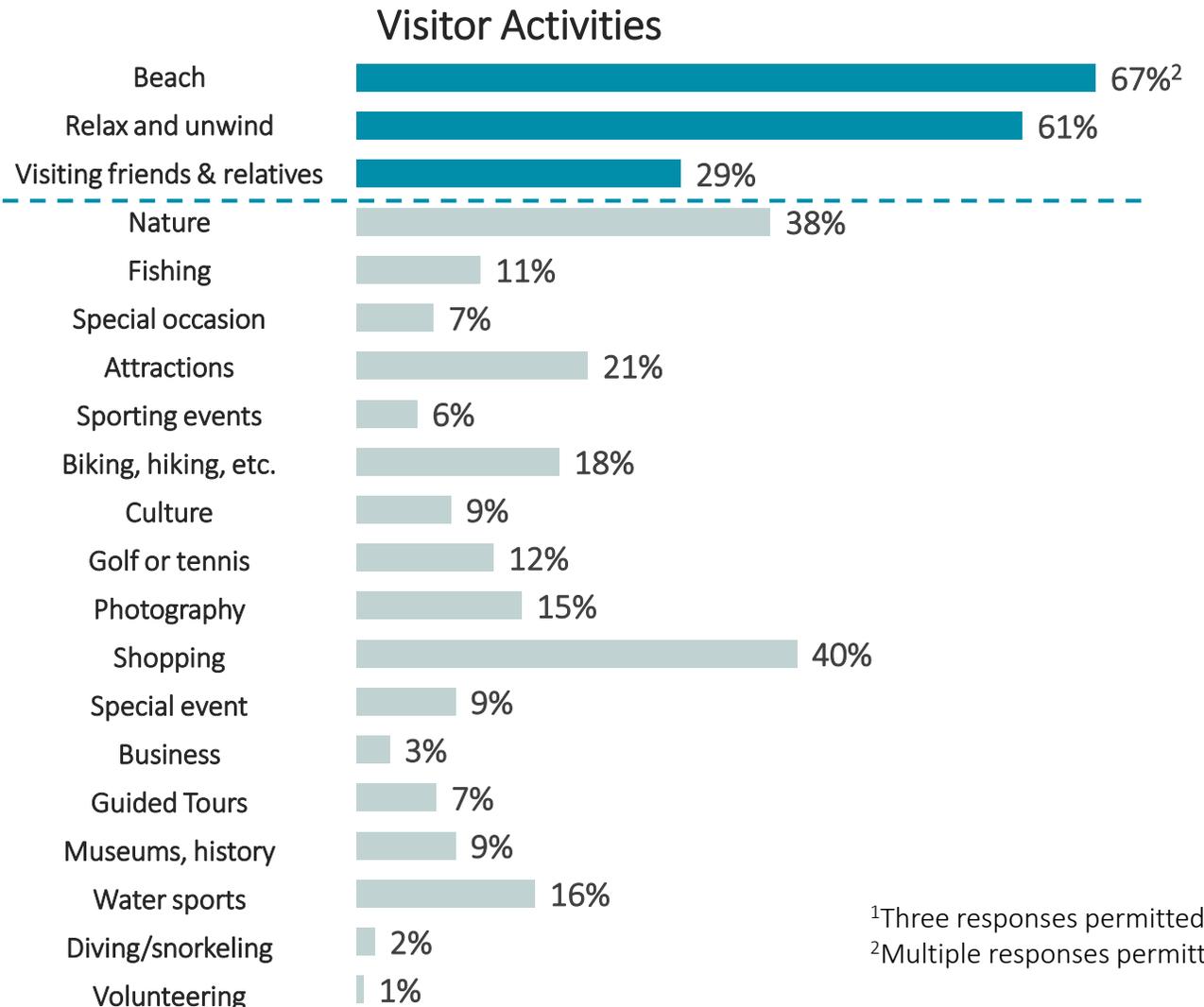

67% Beaches

61% Relax & unwind

60% Dining

[1]Multiple responses permitted.

Trip Experience
Oct – Dec 2019

Reason for Visiting vs. Visitor Activities

	Reason for Visiting		Visitor Activities
Key Reasons for Visiting	38%[1]	Beach	67%[2]
	38%	Relax and unwind	61%
	25%	Visiting friends & relatives	29%
Trip Enhancements	15%	Nature	38%
	8%	Fishing	11%
	7%	Special occasion	7%
	6%	Attractions	21%
	5%	Sporting events	6%
	5%	Biking, hiking, etc.	18%
	5%	Culture	9%
	5%	Golf or tennis	12%
	5%	Photography	15%
	4%	Shopping	40%
	4%	Special event	9%
	3%	Business	3%
	3%	Guided Tours	7%
	3%	Museums, history	9%
	2%	Water sports	16%
	1%	Diving/snorkeling	2%
	1%	Volunteering	1%

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

Travel Party Profile
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Top Attractions Visited[1]

75% Beaches

32% Fort Myers Beach Pier   30% Sanibel Lighthouse   24% Edison & Ford Winter Estates

20% Miromar Outlets   19% Sanibel Outlets

[1]Multiple responses permitted.

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Trip Experience
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Top Communities Stayed

22% Sanibel Island

22% Fort Myers

20% Fort Myers Beach

15% Cape Coral

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Visitor Journey: Post-Trip Evaluation

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

Post-Trip Evaluation
Oct – Dec 2019

Satisfaction

→ **93%** of visitors are likely to recommend The Beaches of Fort Myers & Sanibel

→ **93%** of visitors are likely to return

→ **63%** of visitors are likely to return next year

→ **38%** of visitors said paid accommodations "Far Exceeded" or "Exceeded" their expectations

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Satisfaction

→ **96%** of visitors were satisfied or very satisfied with their overall visit to The Beaches of Fort Myers & Sanibel

→ **93%** of visitors were satisfied or very satisfied with customer service on their visit

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Top Attribute Ratings

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


98% Warm weather

98% Peaceful/relaxing

96% Family atmosphere

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

Post-Trip Evaluation
Oct – Dec 2019

Visitor Concerns

→ **1 in 4** visitors was concerned about Red Tide in The Beaches of Fort Myers & Sanibel

→ **2 in 10** were concerned about traffic

→ **32%** of visitors had no concerns about the destination

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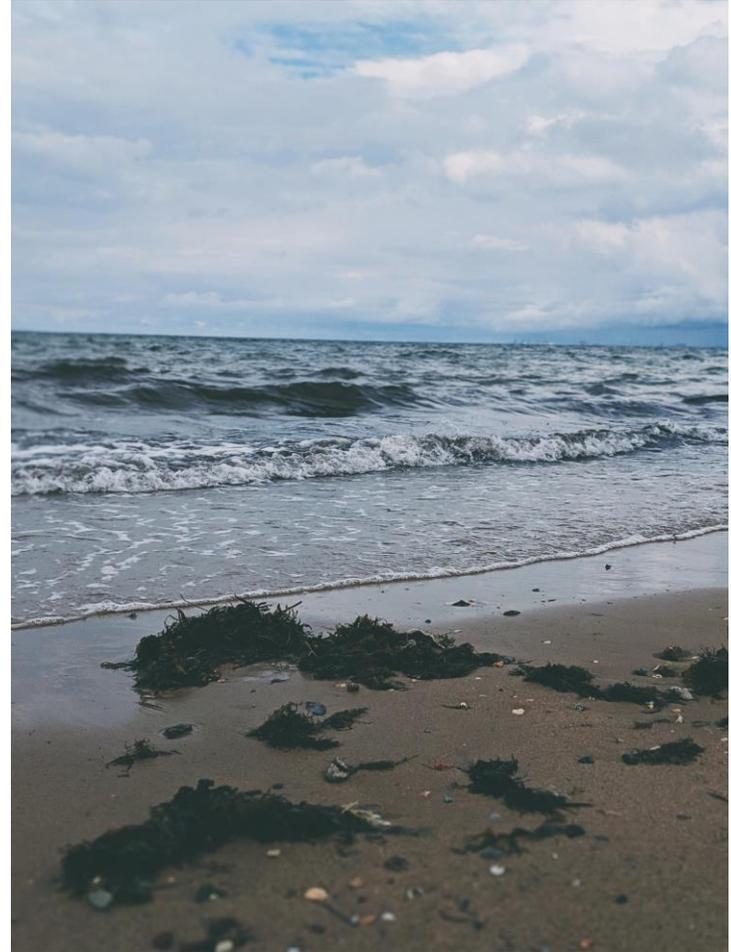
Area Descriptions

"*Great for families. Very quiet and the availability of fresh seafood is a great draw. Also our condo is beautiful. It's the biggest reason we come back. We have been rebooking it for 5 years.*"
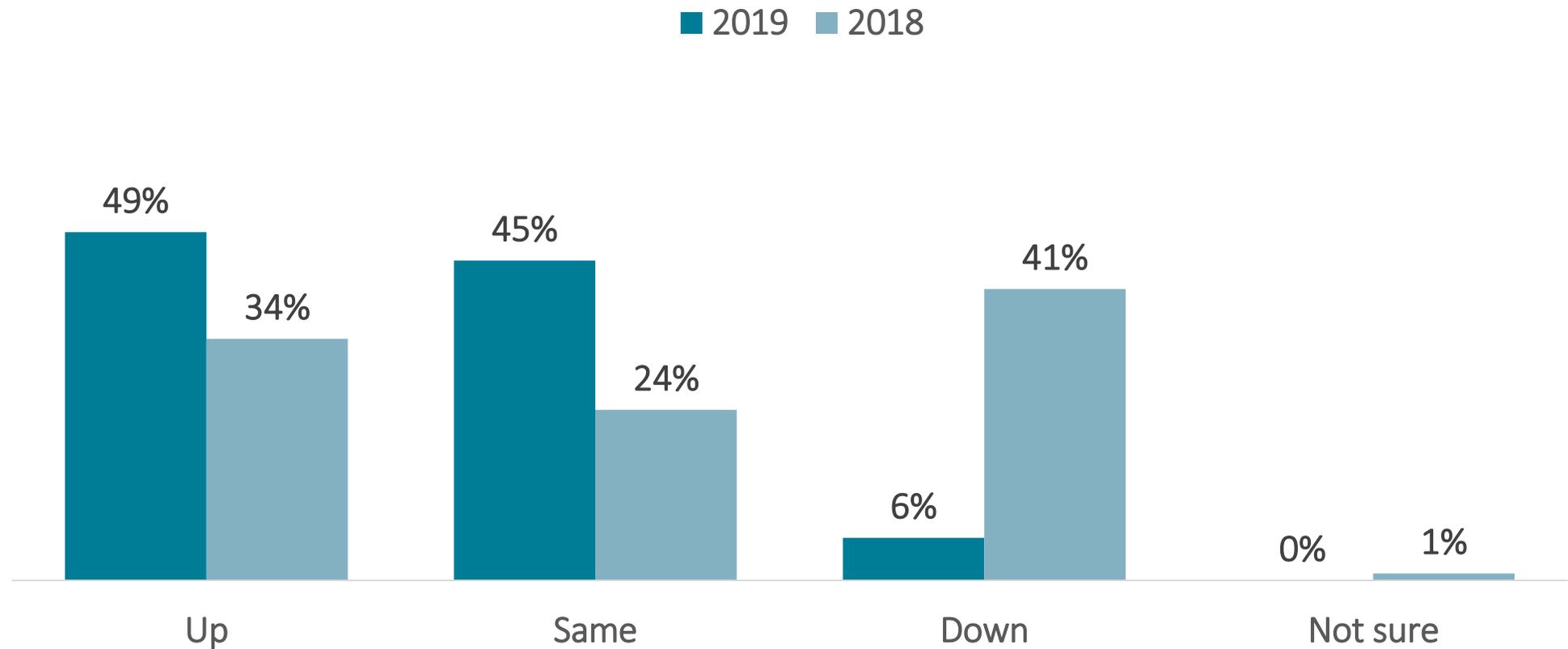
Wonderful Place to Visit

"*Captiva and Sanibel are an amazing place to relax, dine, fish, and go shelling. The weather is lovely as well as the people. You should definitely consider visiting here.*"

Relaxing and Peaceful

"*White sandy beaches in Fort Myers were GORGEOUS! We will definitely be back! Also easy access to public beaches. Friendly people too.*"

Beautiful Beaches

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Post-Trip Evaluation
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Occupancy Barometer: January – March Reservations

Legend: 2019, 2018

	Up	Same	Down	Not sure
2019	49%	45%	6%	0%
2018	34%	24%	41%	1%

Oct – Dec 2019

Occupancy Barometer: April – June Reservations
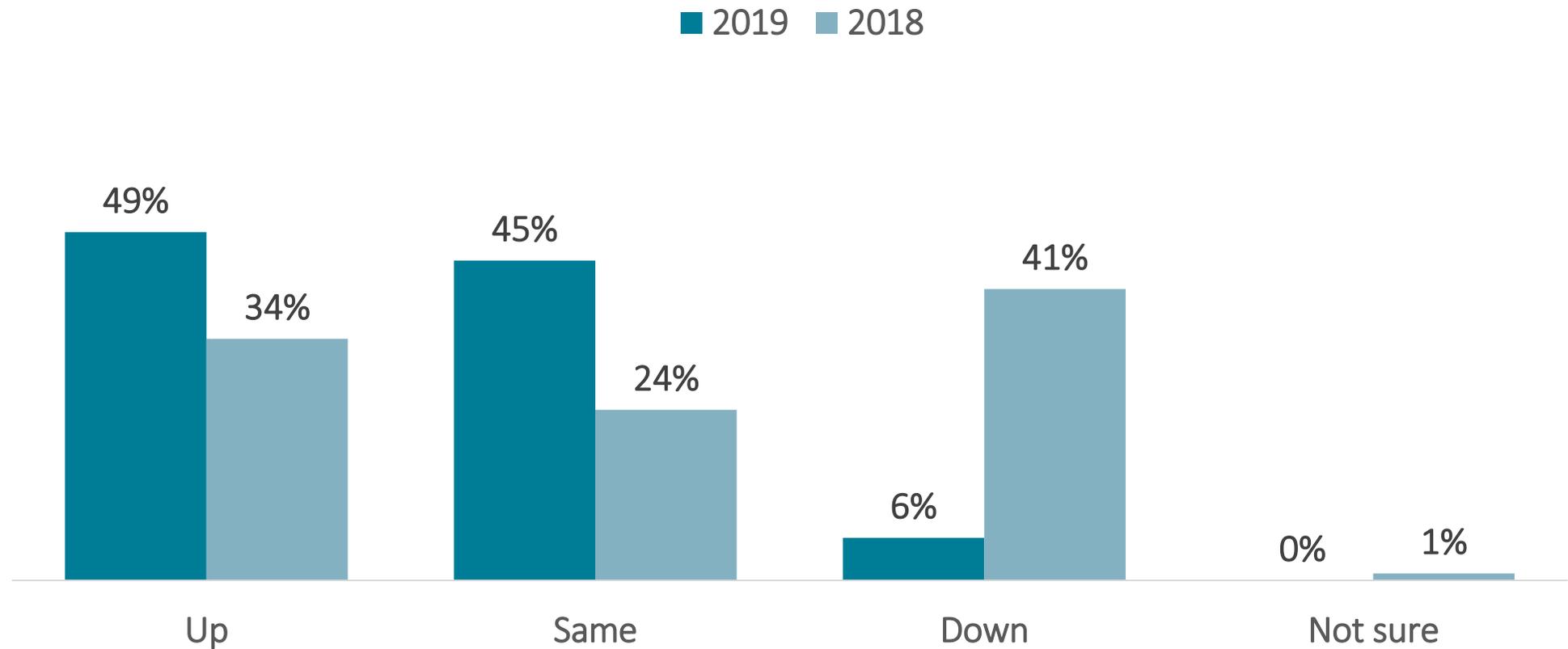
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Detailed Findings

Visitor Journey: Economic Impact on Destination

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

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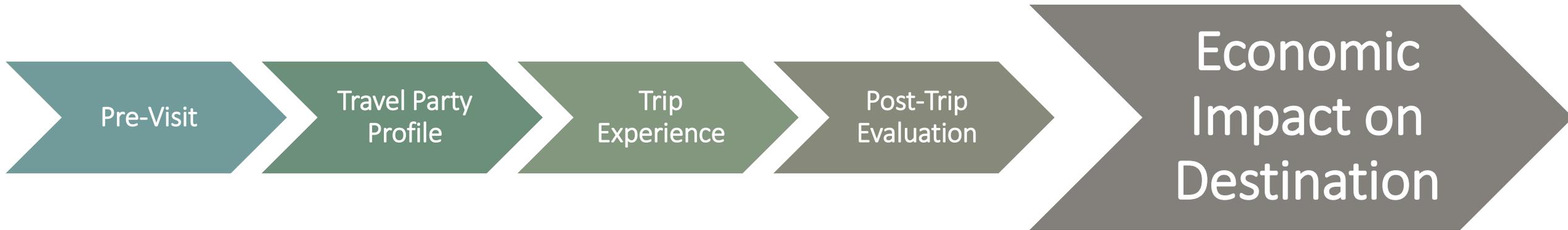
Number of Visitors

There were **1,249,500**[1] visitors to The Beaches of Fort Myers & Sanibel in Oct – Dec 2019 (+13.6% from 2018).

Paid Accommodations
- 849,700 (2019)
- 745,700 (2018)

Non-Paid Accommodations
- 337,400 (2019)
- 354,100 (2018)

Day Trippers
- 62,400 (2019)
- NA (2018)

■ 2019 ■ 2018
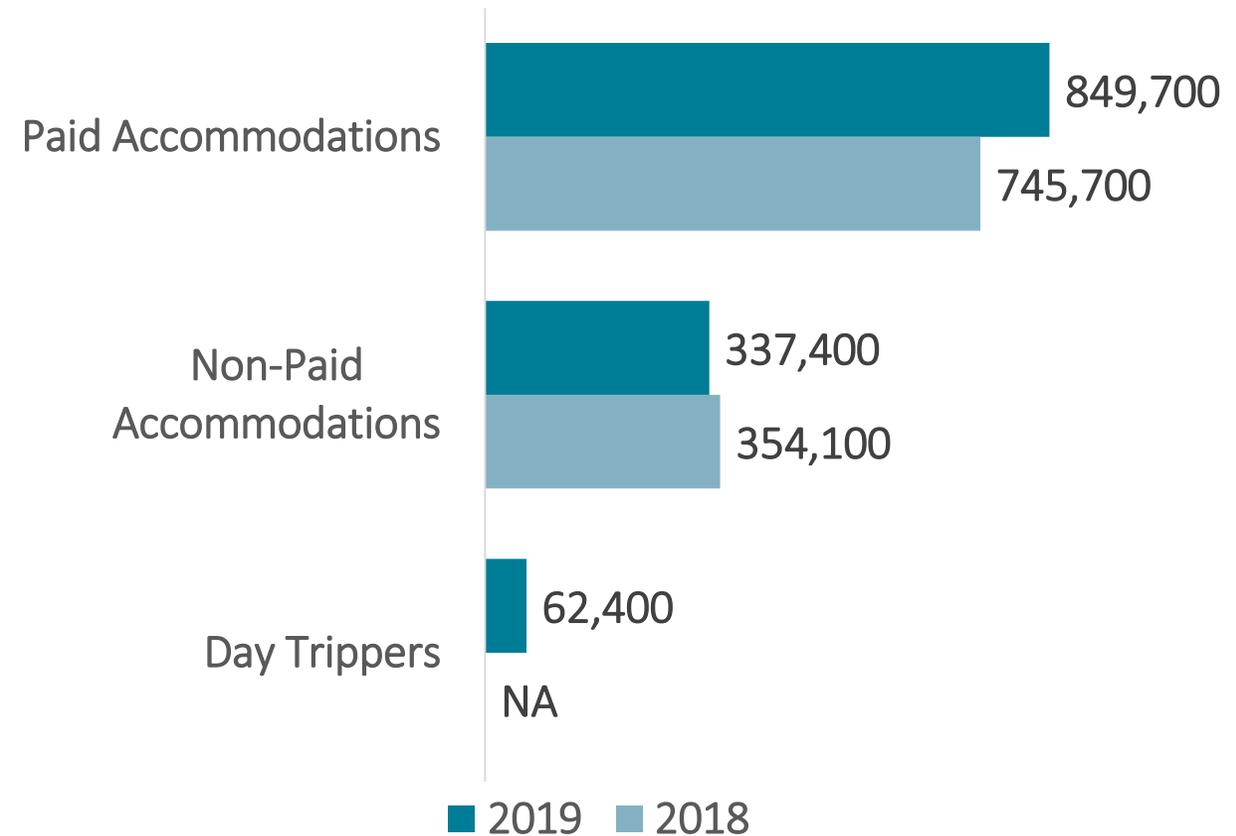
[1]Sources: Visitor Tracking Study & Occupancy Survey

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Economic Impact on Destination
Oct – Dec 2019

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Visitor Type

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

Paid Accommodations
68%
68%

Non-Paid Accommodations
27%
32%

Day Trippers
5%
NA

■ 2019 ■ 2018

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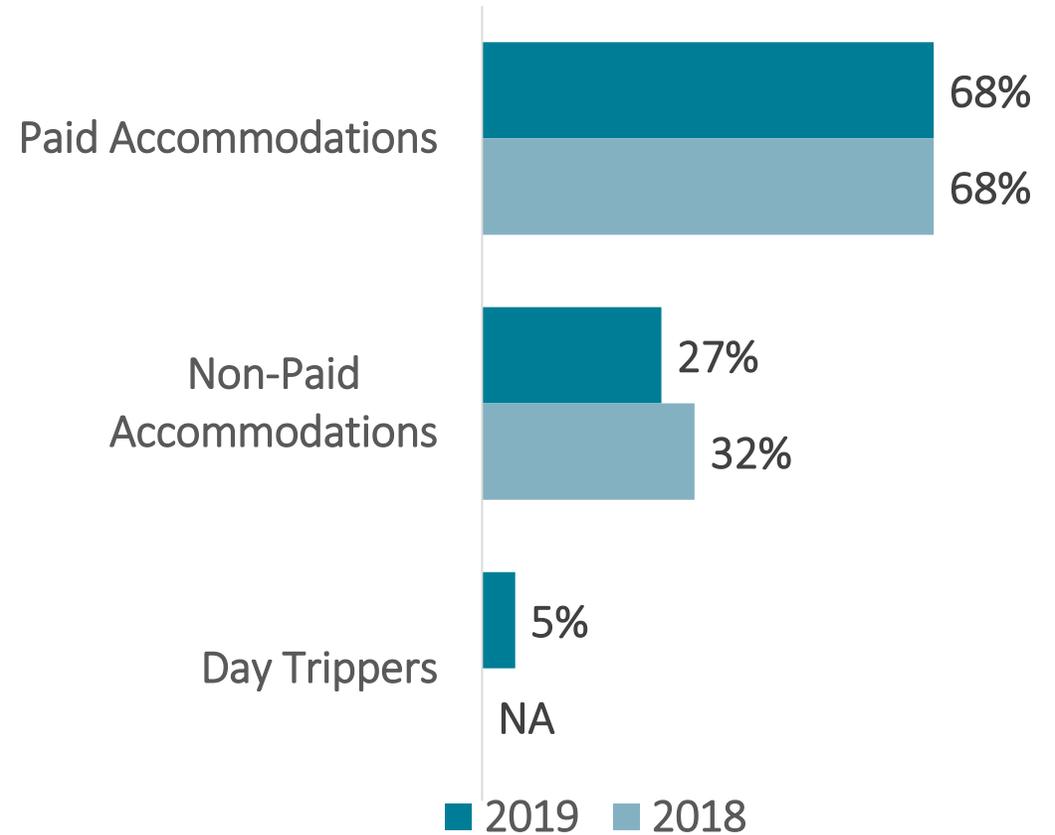
Visitor Expenditures by Visitor Type

Oct – Dec visitors spent **$743,544,500** in The Beaches of Fort Myers & Sanibel, resulting in a total economic impact of **$1,207,516,300**, up 8.7% from 2018.

Direct Spending

Paid Accommodations
- $514,841,000 (2019)
- $500,621,600 (2018)

Non-Paid Accommodations
- $221,701,500 (2019)
- $183,559,800 (2018)

Day Trippers
- $7,002,000 (2019)
- NA (2018)

■ 2019 ■ 2018

Economic Impact on Destination
Oct – Dec 2019

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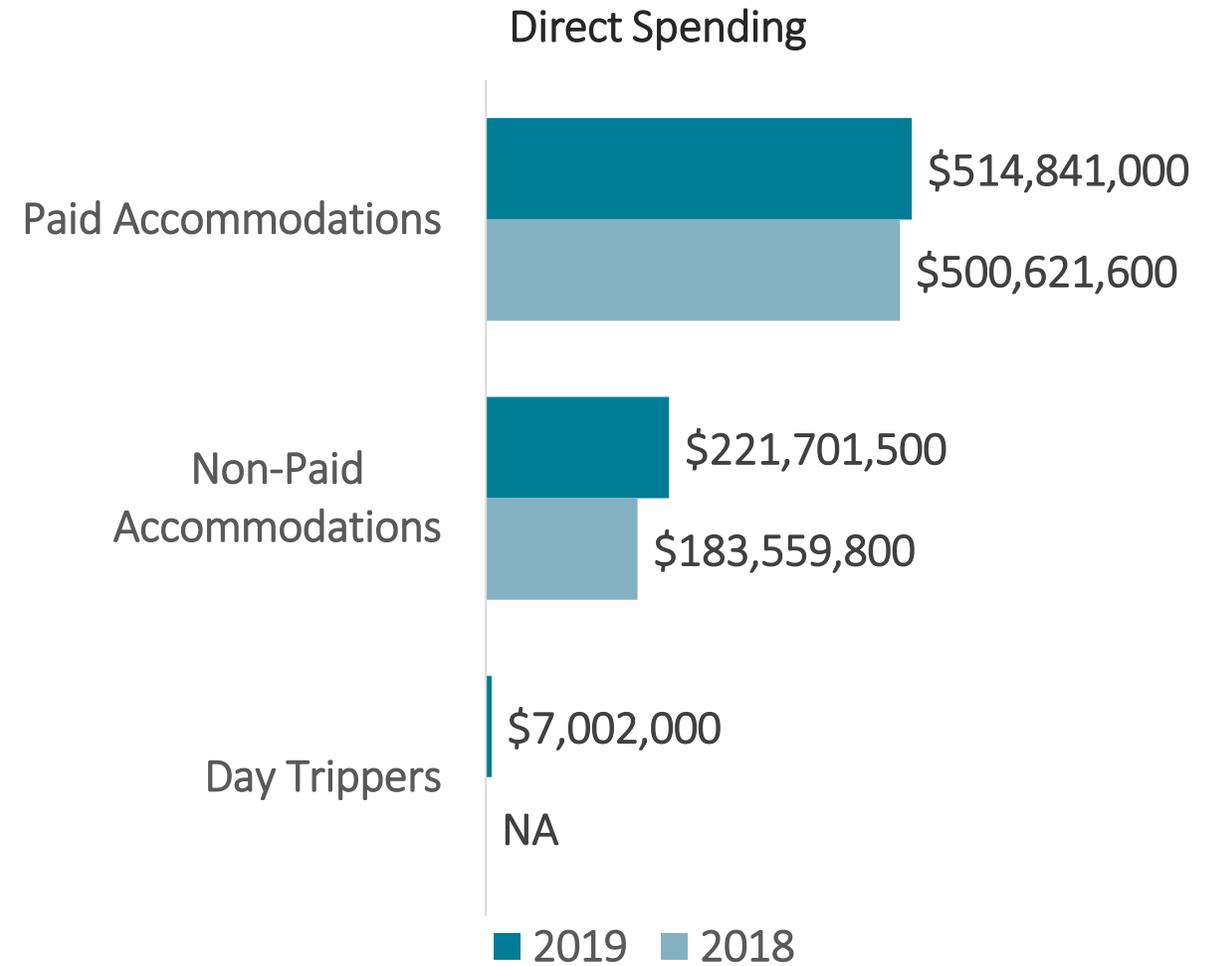
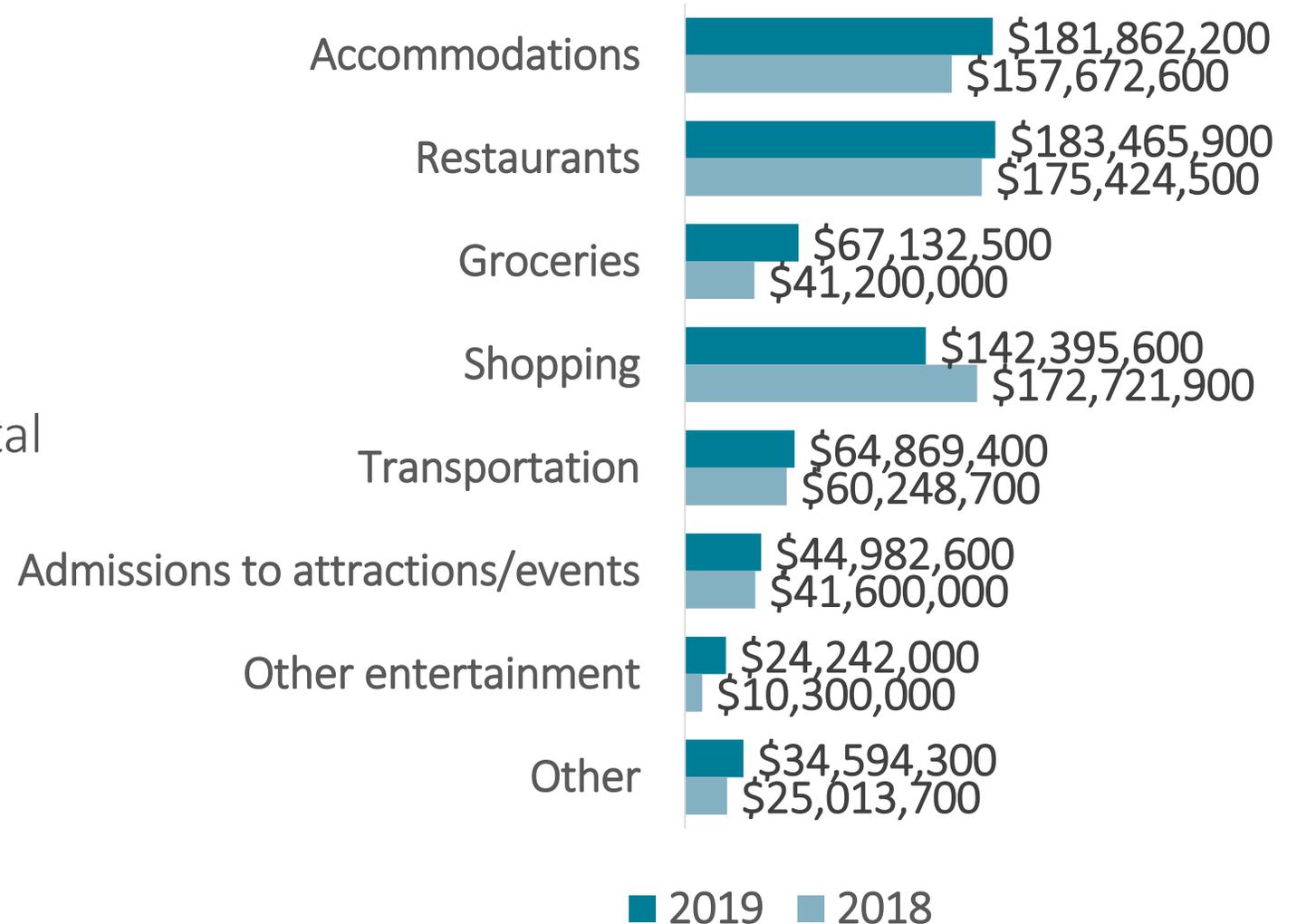# Visitor Expenditures by Spending Category

Oct – Dec visitors spent **$743,544,500** in The Beaches of Fort Myers & Sanibel, resulting in a total economic impact of **$1,207,516,300**.

Category	2019	2018
Accommodations	$181,862,200	$157,672,600
Restaurants	$183,465,900	$175,424,500
Groceries	$67,132,500	$41,200,000
Shopping	$142,395,600	$172,721,900
Transportation	$64,869,400	$60,248,700
Admissions to attractions/events	$44,982,600	$41,600,000
Other entertainment	$24,242,000	$10,300,000
Other	$34,594,300	$25,013,700

■ 2019   ■ 2018

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Visitor Expenditures by Lodging Type

Oct – Dec visitors staying in paid accommodations spent **$514,841,000** in The Beaches of Fort Myers & Sanibel.

Hotel/Motel/Resort/B&B
- $245,892,400
- $250,568,700

Condo/Cottage/Vacation Home
- $164,096,700
- $141,006,000

RV Park/Campground
- $104,851,900
- $109,046,900

■ 2019   ■ 2018

Economic Impact on Destination
Oct – Dec 2019

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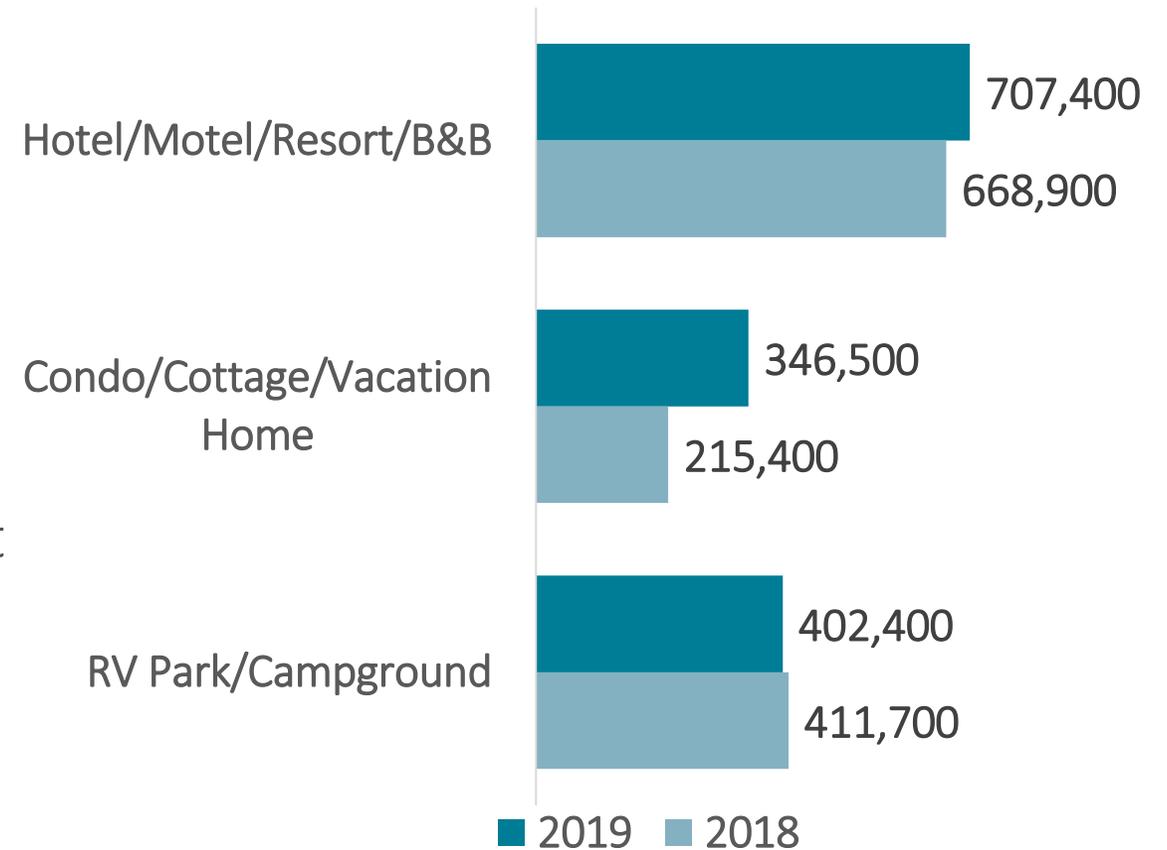R E S E A R C H
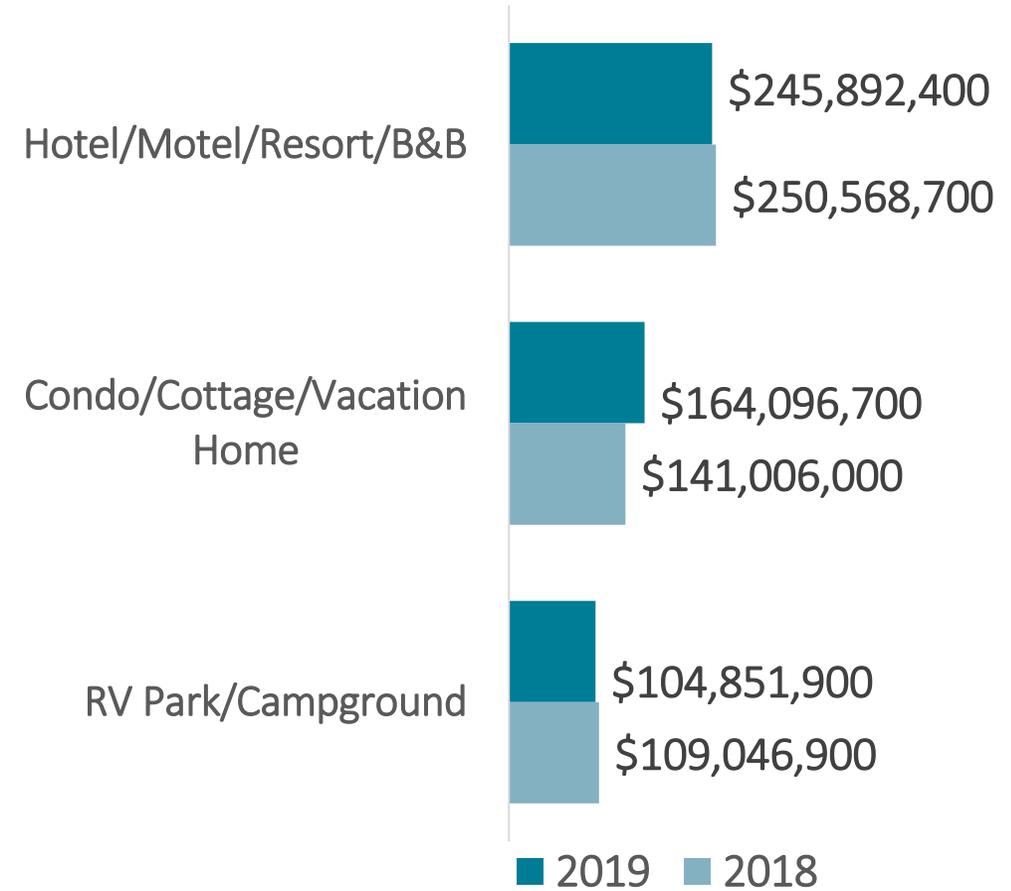
Room Nights Generated

Oct – Dec visitors spent **1,456,300**[1] nights in The Beaches of Fort Myers & Sanibel hotels, resorts, condos, rental houses, etc. (+12.4% from 2018).

1,296,000

1,456,300

2018

2019

[1]Source: Occupancy Survey

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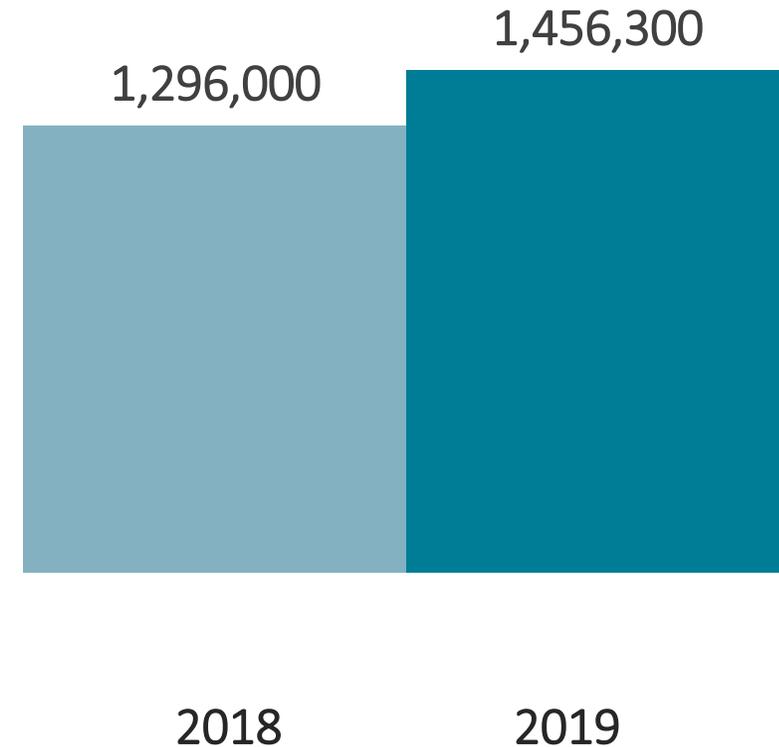
Room Nights Generated

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

Hotel/Motel/Resort/B&B
- 707,400
- 668,900

Condo/Cottage/Vacation Home
- 346,500
- 215,400

RV Park/Campground
- 402,400
- 411,700

■ 2019   ■ 2018

[1]Source: Occupancy Survey

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Economic Impact on Destination
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Available Units

There were **25,963**[1]
available units in Oct – Dec, 2019 vs. 22,807 in 2018 (+13.8%). Nearly half of the units were hotels, motels, etc.

Hotel/Motel/Resort/B&B
- 2019: 12,050
- 2018: 11,281

Condo/Cottage/Vacation Home
- 2019: 6,386
- 2018: 4,789

RV Park/Campground
- 2019: 7,527
- 2018: 6,737

■ 2019 ■ 2018
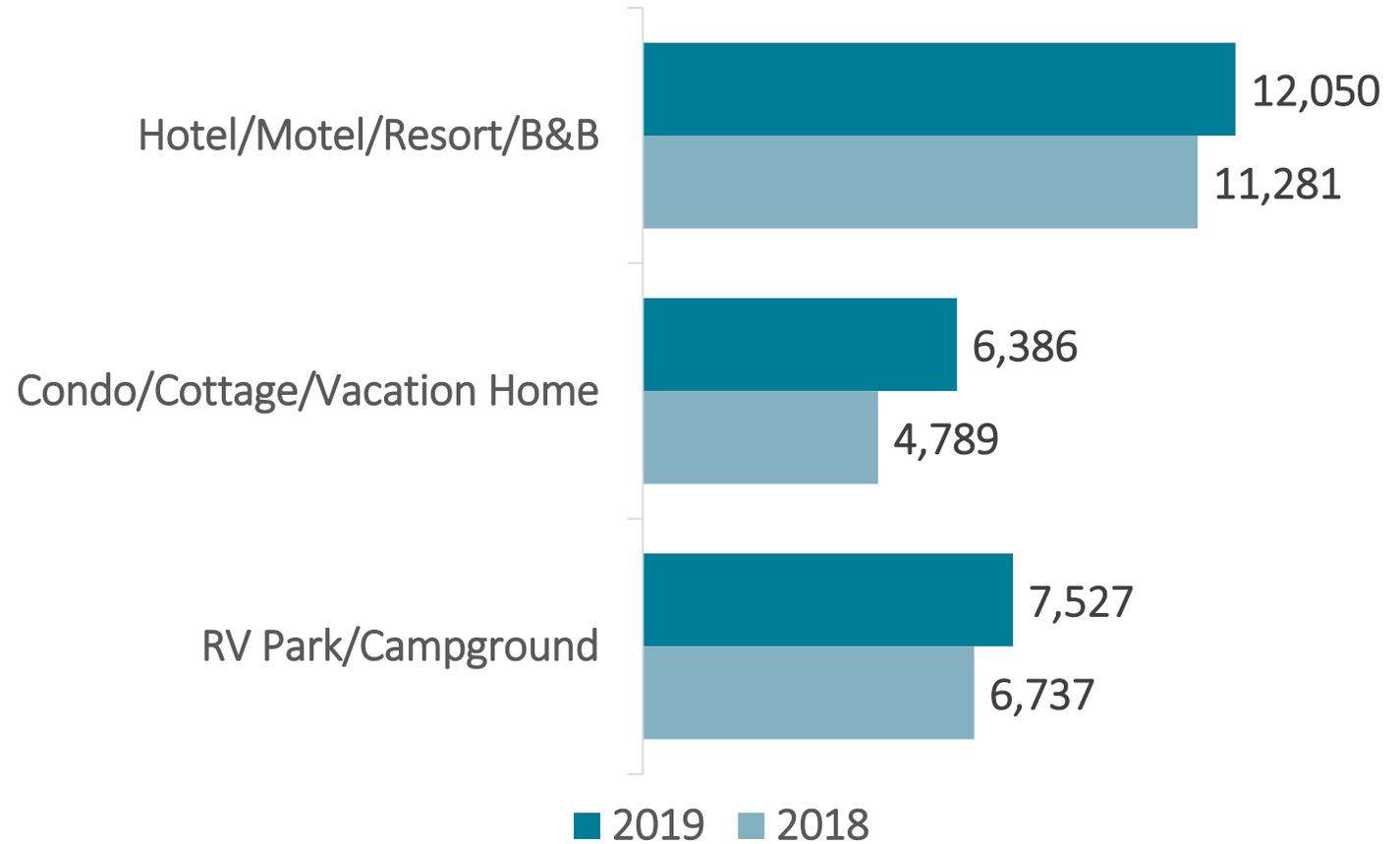
[1]Source: Occupancy Survey

Occupancy, ADR and RevPAR

Occupancy (+2.1%)[1]

61.8% 63.1%

2018 2019

ADR (+12.9%)[1]

$121.66 $137.39

2018 2019

RevPAR (+15.3%)[1]

$75.19 $86.69

2018 2019

[1]Source: Occupancy Survey

Economic Impact on Destination
Oct – Dec 2019

Occupancy

Average occupancy in Oct – Dec was **63.1%**[1] (61.8% in 2018).

Hotel/Motel/Resort/B&B
- 66.0% (2019)
- 64.5% (2018)

Condo/Cottage/Vacation Home
- 61.0% (2019)
- 48.9% (2018)

RV Park/Campground
- 60.1% (2019)
- 66.4% (2018)

■ 2019　■ 2018

[1]Source: Occupancy Survey

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Economic Impact on Destination
Oct – Dec 2019

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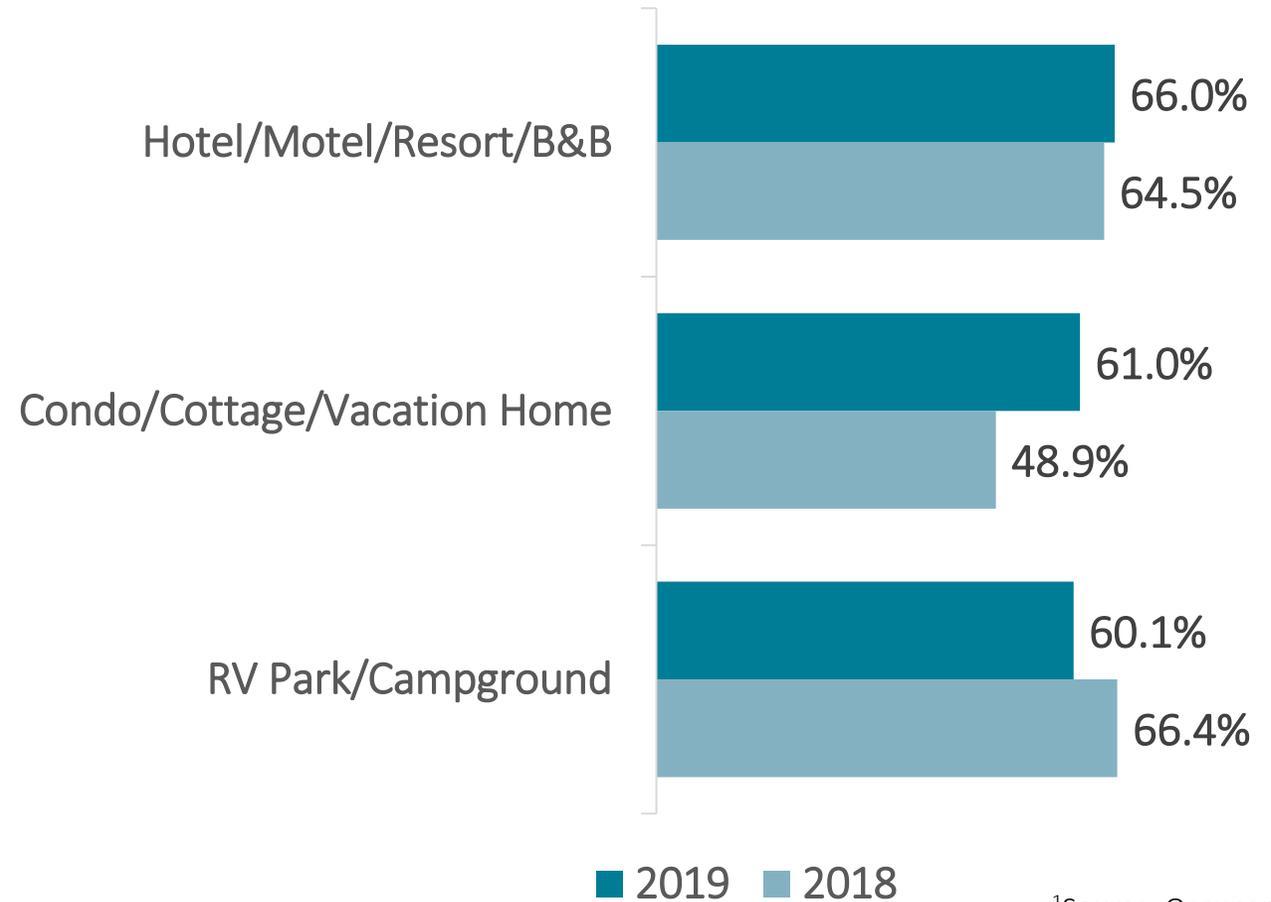
ADR

ADR in Oct – Dec was **$137.39**[1] ($121.66 in 2018).

Hotel/Motel/Resort/B&B
- $140.98
- $134.38

Condo/Cottage/Vacation Home
- $202.79
- $209.65

RV Park/Campground
- $76.14
- $54.98

■ 2019 ■ 2018

[1]Source: Occupancy Survey

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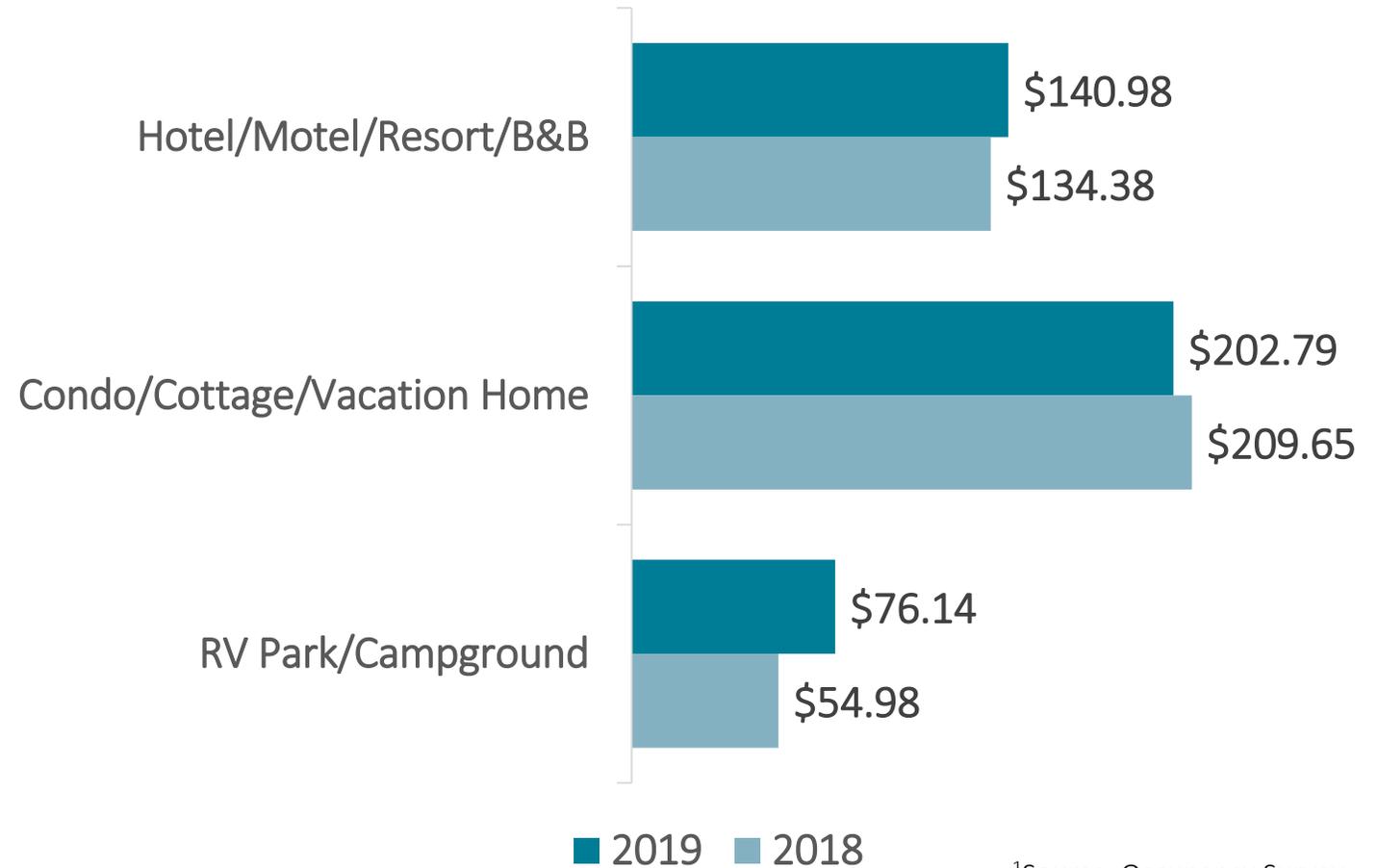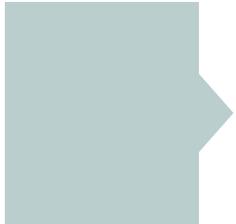
RevPAR

Average RevPAR in Oct – Dec was **$86.69**[1] ($75.19 in 2018).

Hotel/Motel/Resort/B&B
$93.05
$86.68

Condo/Cottage/Vacation Home
$123.70
$102.52

RV Park/Campground
$45.76
$36.51

■ 2019 ■ 2018

[1]Source: Occupancy Survey

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Economic Impact on Destination
Oct – Dec 2019

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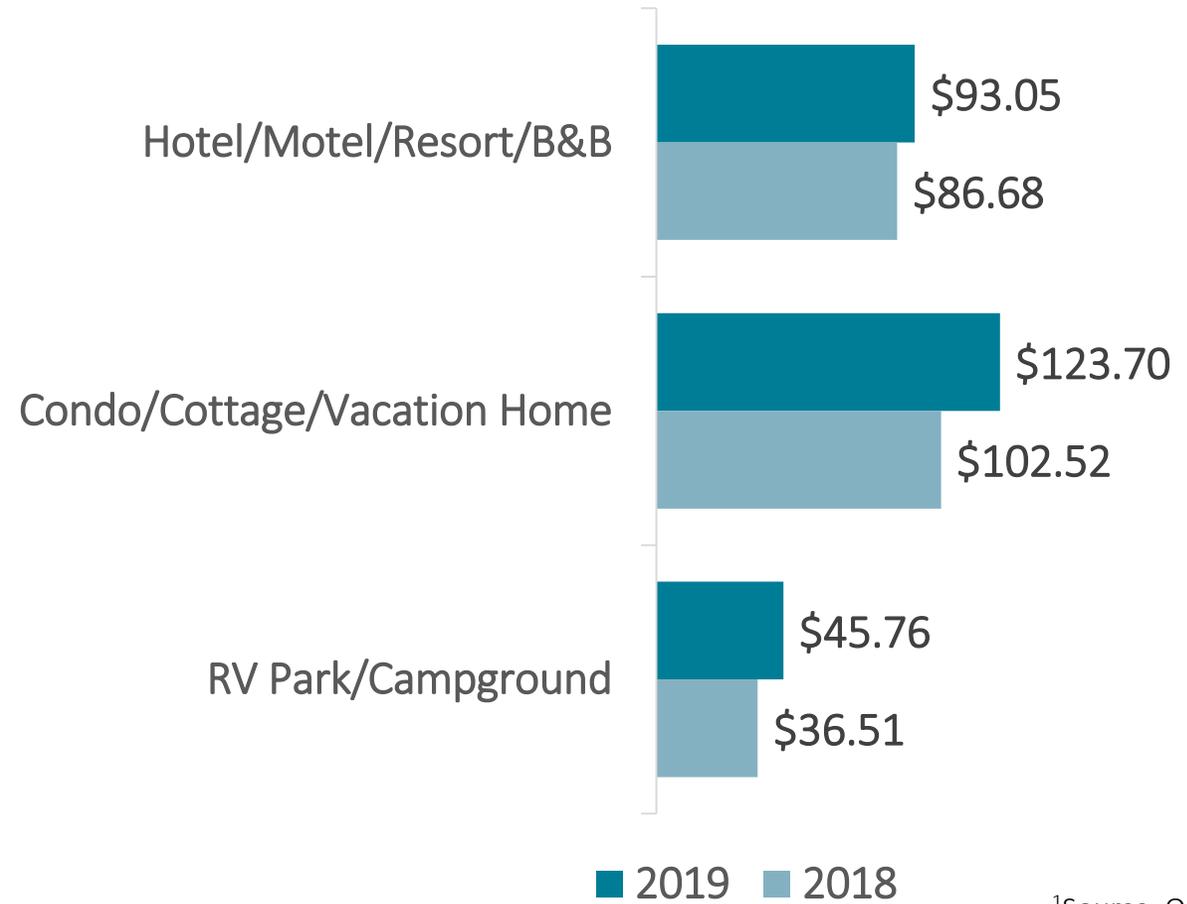
Travel Party Size

For visitors in paid accommodations, average travel party size in Oct – Dec was **2.7 people**[1] (2.5 people in 2018).

Hotel/Motel/Resort/B&B
- 2019: 2.4
- 2018: 2.4

Condo/Cottage/Vacation Home
- 2019: 4.0
- 2018: 4.0

RV Park/Campground
- 2019: 2.1
- 2018: 2.0

■ 2019 ■ 2018

[1]Source: Occupancy Survey

THE BEACHES OF FORT MYERS AND SANIBEL

Economic Impact on Destination
Oct – Dec 2019

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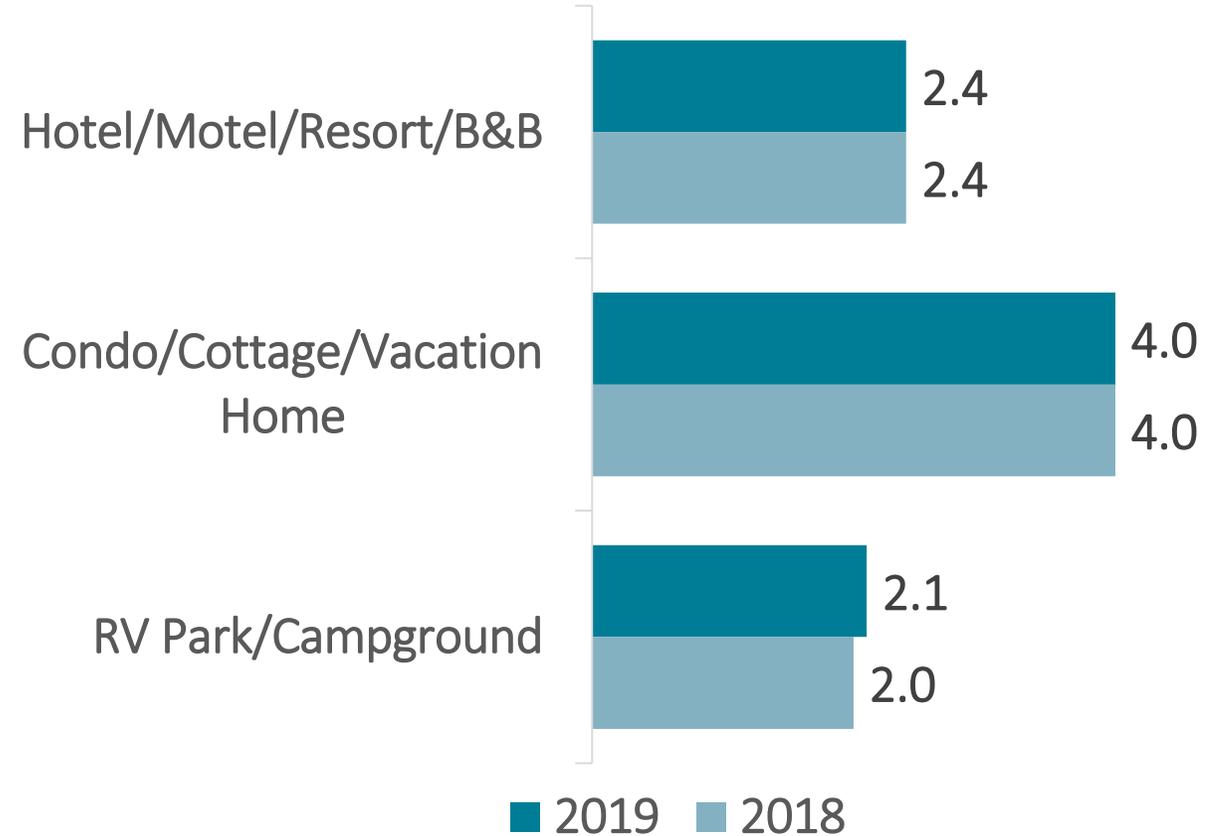
Length of Stay

For visitors in paid accommodations, average length of stay in Oct – Dec was **4.8 nights**[1] (4.4 nights in 2018).

Hotel/Motel/Resort/B&B
- 2.8
- 2.7

Condo/Cottage/Vacation Home
- 8.2
- 7.8

RV Park/Campground
- 20.9
- 22.0

■ 2019 ■ 2018

[1]Source: Occupancy Survey

THE BEACHES OF
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Economic Impact on Destination
Oct – Dec 2019

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Visitor Journey: Pre-Visit

Pre-Visit → Travel Party Profile → Trip Experience → Post-Trip Evaluation → Economic Impact on Destination
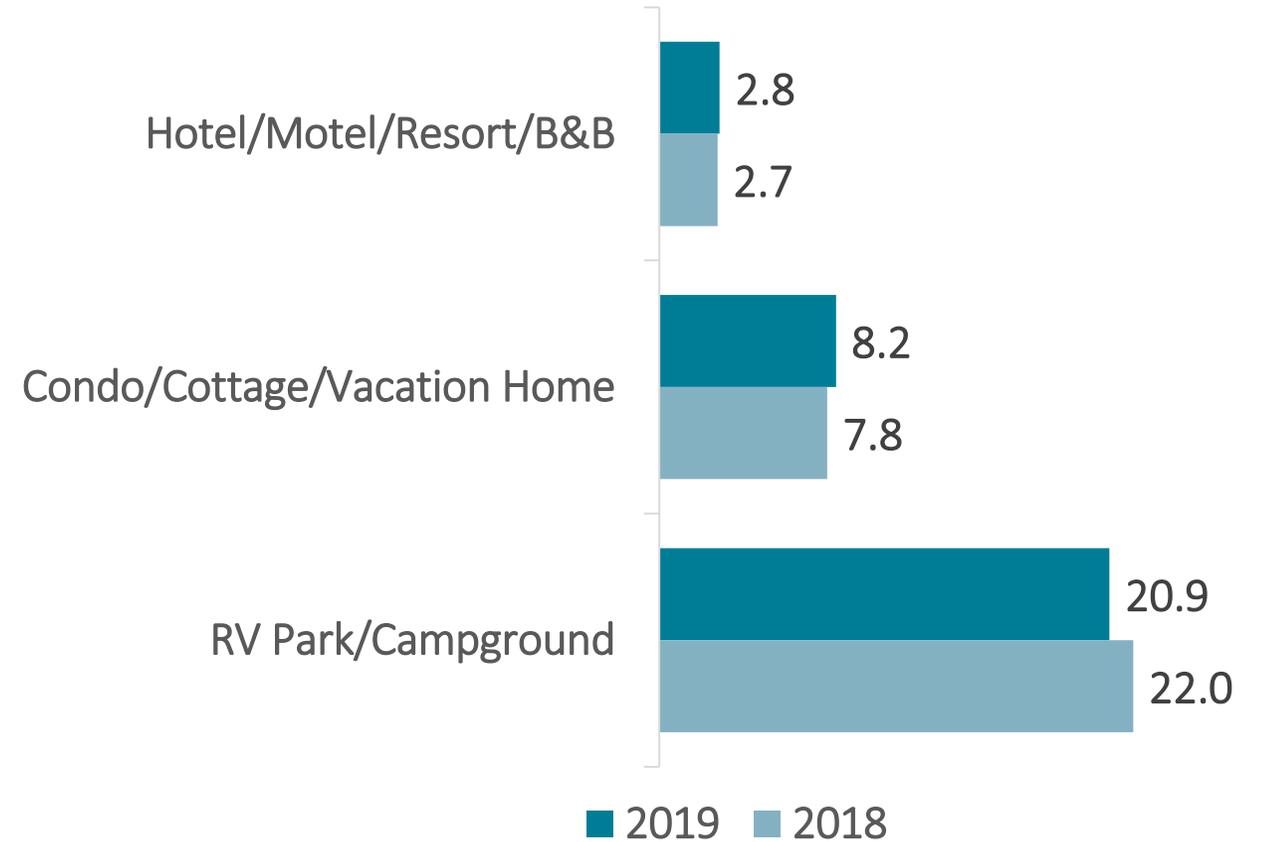
Pre-Visit
Oct – Dec 2019
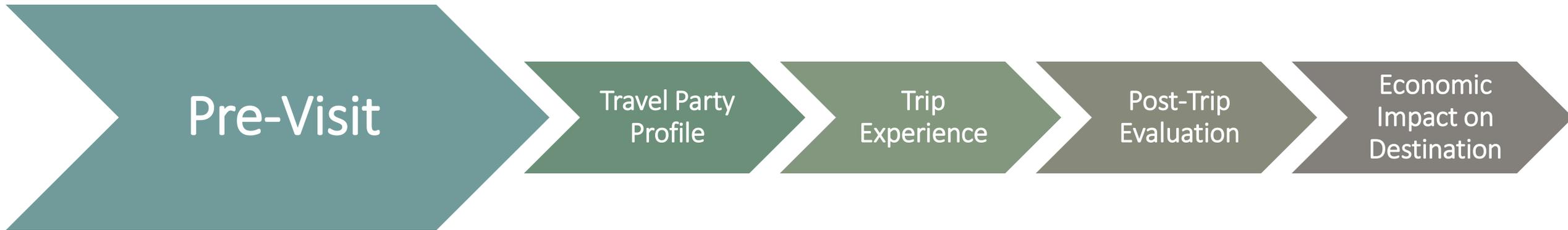
Trip Planning Cycle
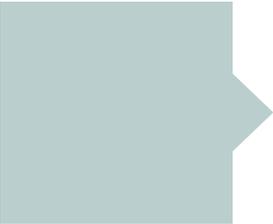
Nearly **2 in 3** visitors planned their trip at least 3 months in advance, while only **15%** planned their trip less than a month in advance.
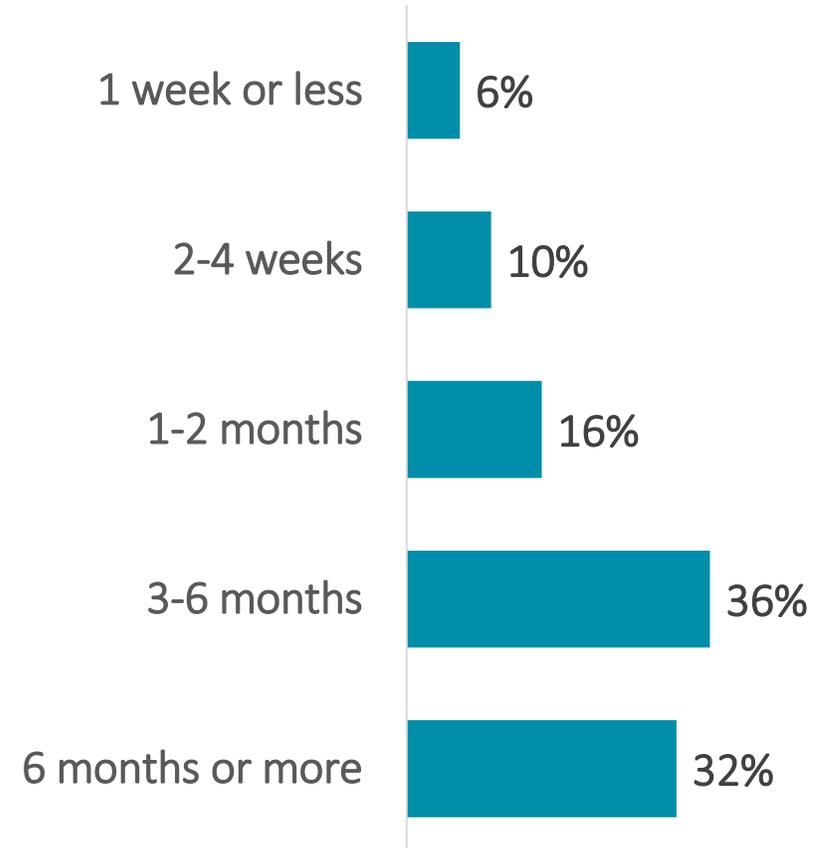
1 week or less	6%
2-4 weeks	10%
1-2 months	16%
3-6 months	36%
6 months or more	32%

Trip Planning: Websites Used

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

Website	%
Airline websites	36%[1]
Hotel websites	17%
Trip Advisor	17%
Search engines	16%
Online travel agency	15%
AirBnB, VRBO, Homeaway	15%
Vacation rental websites	11%
Visit Florida	7%
Beaches of Fort Myers & Sanibel social media	6%
Facebook	6%
www.FortMyers-Sanibel.com	6%
Travel reviews, blogs, stories	4%
Instagram	1%
Youtube, Hulu, Pandora	1%
Other	6%
None/Don't visit websites	18%
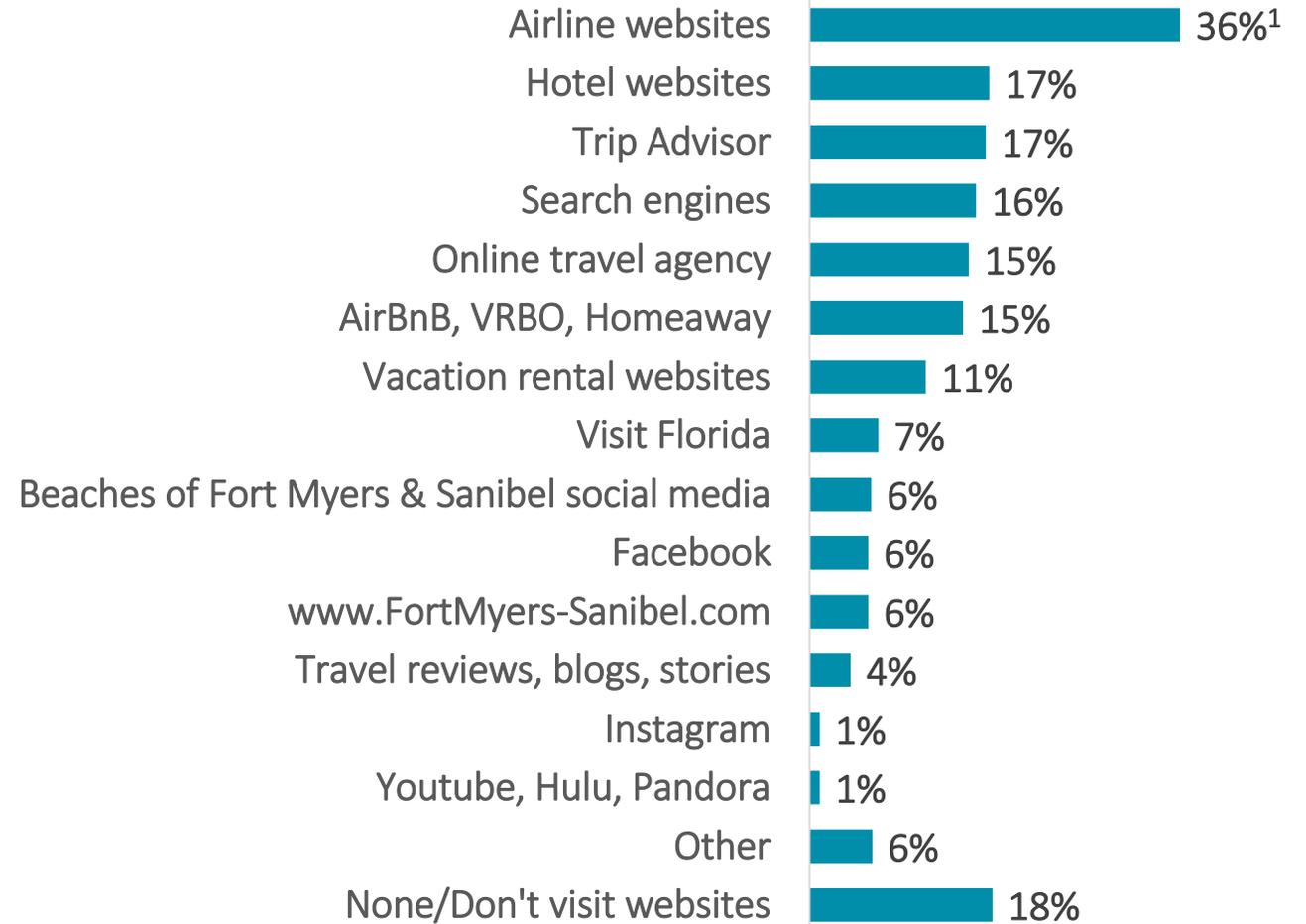
[1]Multiple responses permitted.

Trip Planning: Information Requests

2 in 10 visitors made information requests to plan their trip to The Beaches of Fort Myers & Sanibel.

Call hotel/motel/condo — 10%[1]

Visitor guide — 3%

Fort Myers-Sanibel E-newsletter — 2%

Call local Chamber of Commerce — 2%

Call VCB — 1%

Other — 4%

None/Did not request info — 79%

[1]Multiple responses permitted.

Pre-Visit
Oct – Dec 2019

Trip Planning: Other destinations considered

10% of visitors considered choosing other destinations when planning their trips.

Destination	
Tampa-Clearwater-St. Pete	1%
Ft. Lauderdale	1%
Keys/Key West	1%
Marco Island	1%
Miami	1%
Naples	1%
Orlando	1%
Other destinations in Florida	1%
Other destinations outside of Florida	2%

THE BEACHES OF FORT MYERS AND SANIBEL

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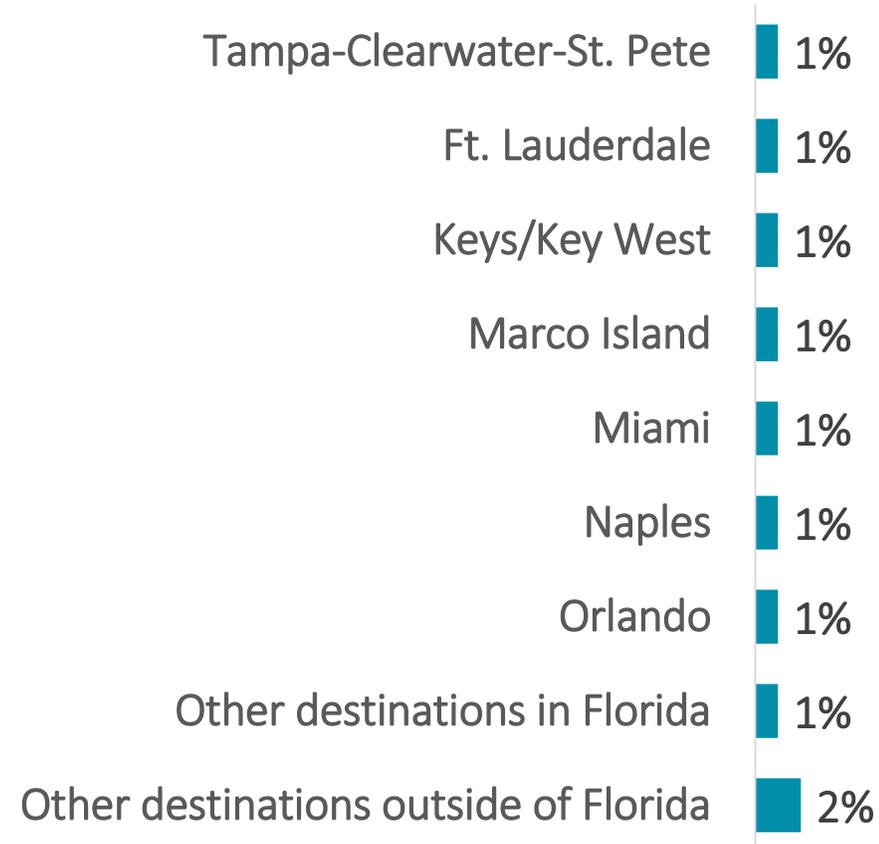
Trip Influencers

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

Attribute	Score
Warm weather	89%[1]
Peaceful/relaxing	88%
A safe destination	84%
White sandy beaches	82%
Clean, unspoiled environment	80%
Convenient location	79%
Plenty to see and do	76%
Value for your travel dollar	74%
A "family" atmosphere	73%
Reasonably priced lodging	69%

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

THE BEACHES OF FORT MYERS AND SANIBEL

Pre-Visit
Oct – Dec 2019

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Reason for visiting

Reason	%
Vacation	55%[1]
Beach	38%
Relax and unwind	38%
Visiting friends or relatives	25%
Nature, environment, bird watching	15%
Fishing, etc.	8%
Special occasion	7%
Attractions	6%
Sporting events	5%
Biking, hiking, etc.	5%
Culture	5%
Golf or tennis	5%
Photography	5%
Special event	4%
Shopping	4%
Business conference/meeting	3%
Museums, history	3%
Guided Tours	3%
Water sports	2%
Diving/snorkeling	1%
Volunteering	1%
Other	8%

[1]Three responses permitted.

Pre-Visit
Oct – Dec 2019

Promotions

30% of visitors recalled promotions in the past 6 months for The Beaches of Fort Myers & Sanibel.

Source of Promotion

Source	Percentage
Internet	33%
Social media	28%
Television	17%
Travel/visitor guide	16%
AAA	14%
Brochure	10%
Magazine	9%
www.FortMyers-Sanibel.com	7%
Traveler reviews/blogs	7%
Deal-based promotion	7%
Newspaper	5%
Radio	3%
Billboard	2%[1]
Other	4%

[1]Multiple responses permitted.

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Pre-Visit
Oct – Dec 2019

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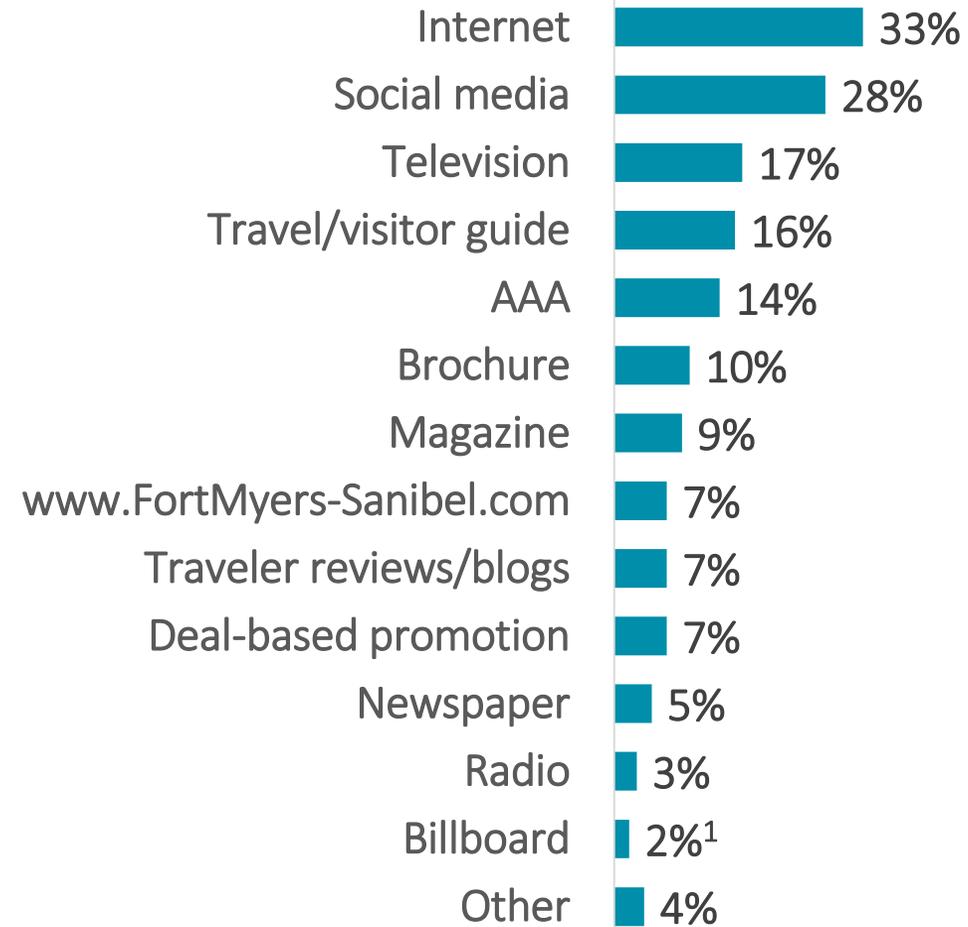
Booking

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

Directly with hotel — 46%
Online travel agency — 16%
VRBO, HomeAway — 14%
Through a vacation rental company — 12%
Airbnb — 8%
Other — 4%

Pre-Visit
Oct – Dec 2019
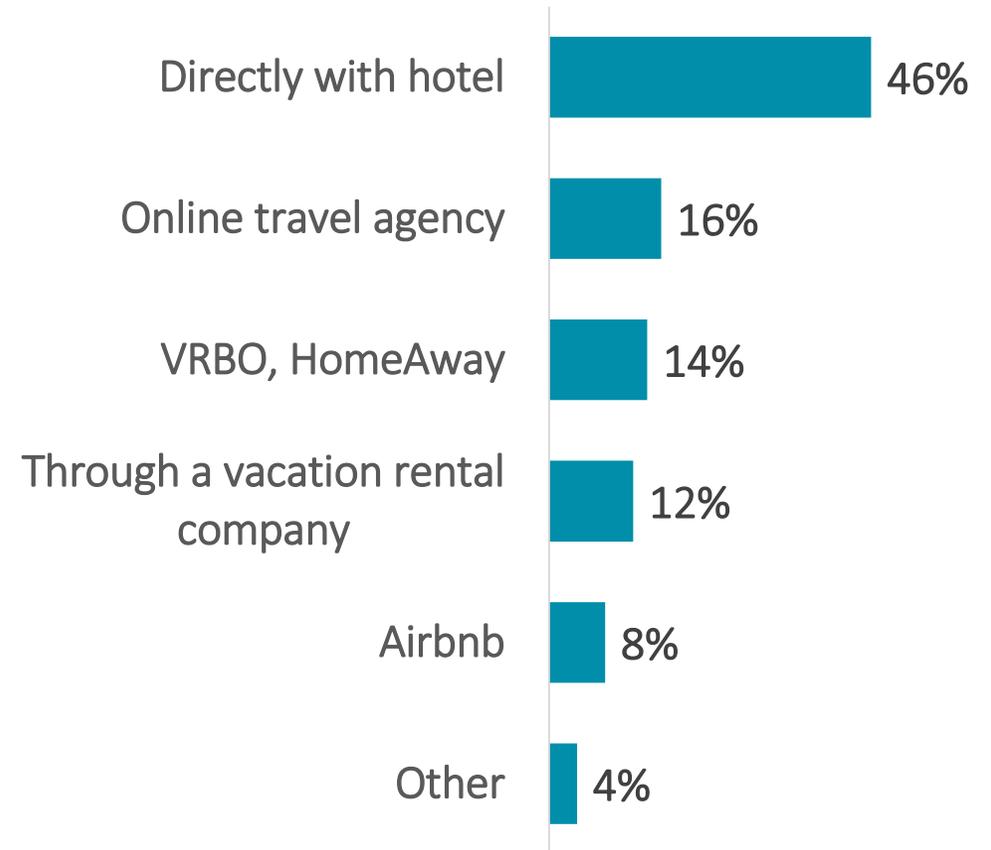
Transportation

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

Fly — 70%

Drive a personal vehicle — 24%

Drive a rental vehicle — 4%

Drive a RV — 1%

Travel by bus — 1%

Other — 1%

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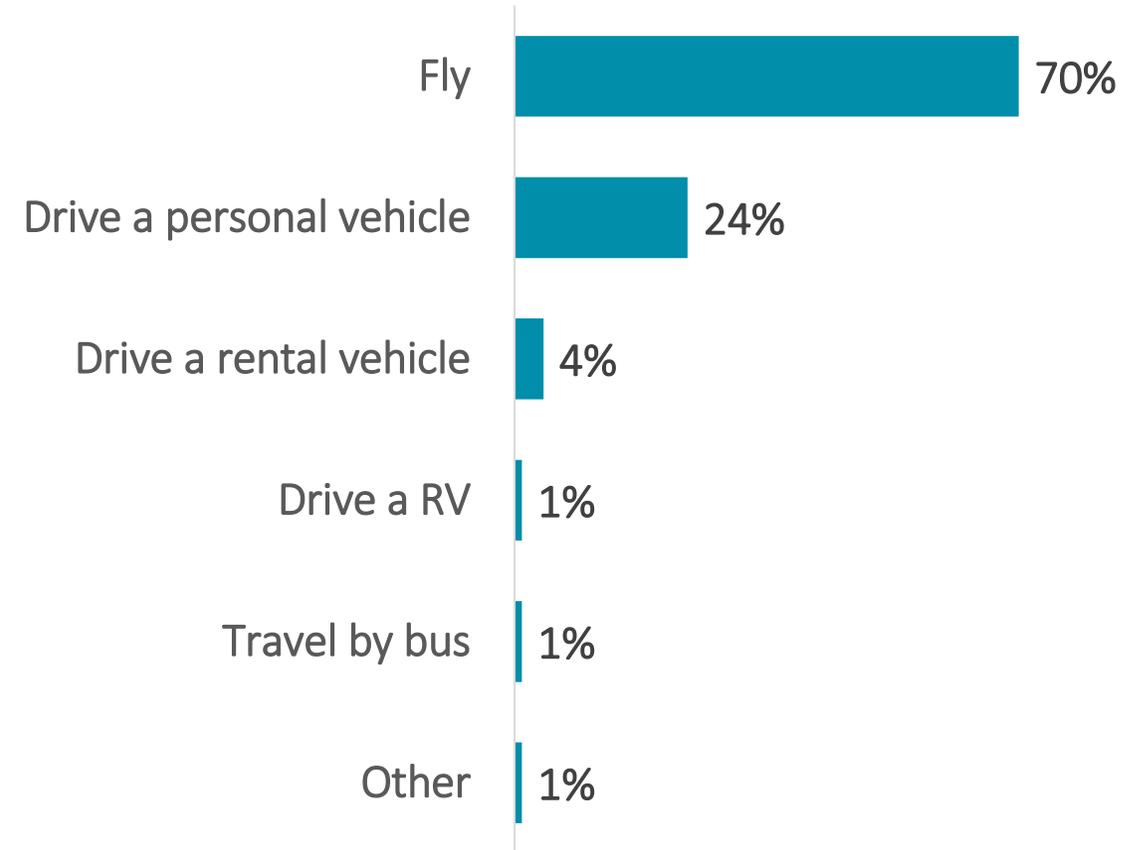
Airport

7 in 10 visitors who flew to The Beaches of Fort Myers & Sanibel came through RSW.

Airport	Percentage
Southwest Florida International	69%
Punta Gorda	10%
Ft. Lauderdale International	9%
Miami International	4%
Tampa International	4%
Orlando International	4%
Other	1%

THE BEACHES OF
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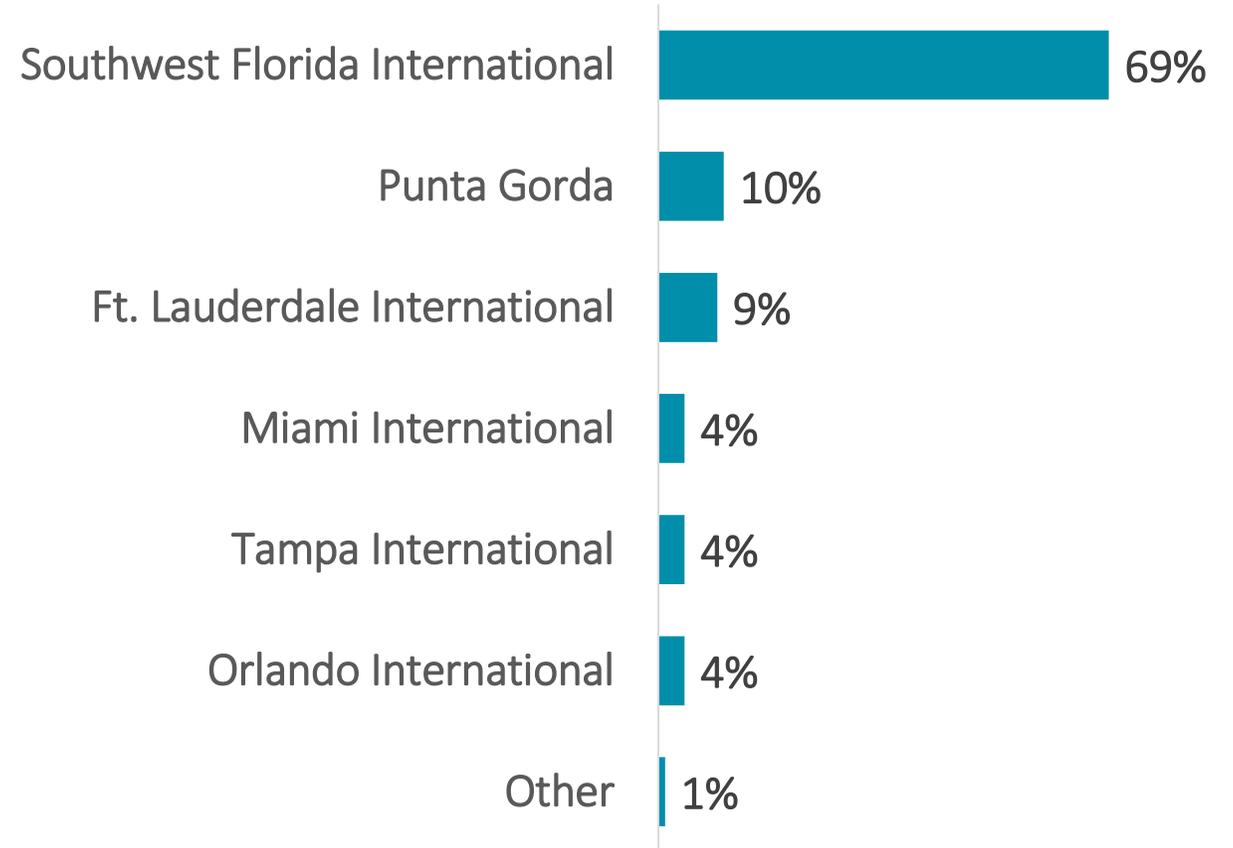
Use of RSW in the Past Year

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

Did not use RSW — 34%

1 trip — 32%

2-3 trips — 23%

4-5 trips — 6%

6 or more trips — 6%

THE BEACHES OF FORT MYERS AND SANIBEL

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Visitor Journey: Travel Party Profile

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

Travel Party Profile
Oct – Dec 2019

Origin[1]

Florida — 10%
Southeast — 16%
Northeast — 18%
Midwest — 37%
West — 6%
Canada — 3%
United Kingdom — 2%
Germany — 5%
Other Europe — 2%
Other International — 1%

87% of visitors came from **the US**

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

Travel Party Profile
Oct – Dec 2019

THE BEACHES OF
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RESEARCH

Number of Visitors by Origin

Origin	Visitors
Florida	124,950
Southeast	199,920
Northeast	224,910
Midwest	462,315
West	74,970
Canada	37,485
United Kingdom	24,990
Germany	62,475
Other Europe	24,990
Other International	12,495

Travel Party Profile
Oct – Dec 2019

Number of Visitors by Origin

Domestic Out-of-State: 962,115

In-State: 124,950

International: 162,435

Pie chart:
- Domestic Out-of-State: 77%
- In-State: 10%
- International: 13%

Travel Party Profile
Oct – Dec 2019

Origin Country

Country[1]	% of Visitors
United States	87%
Germany	5%
Canada	3%
United Kingdom	2%
Other	3%

[1]1% or fewer visitors came from Australia, Belgium, Catalonia, Columbia, Greece, Ireland, The Netherlands, Sweden, Switzerland, and Venezuela.

THE BEACHES OF
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Travel Party Profile
Oct – Dec 2019

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Origin Markets[1]

Market	Percentage of Visitors
Cincinnati	6%
New York City	5%
Chicago	4%
Miami-Ft. Lauderdale	3%
Minneapolis	3%
Indianapolis	3%
Detroit	3%
Philadelphia	2%
Atlanta	2%
Boston	2%
Naples	2%
Cleveland	2%
Green Bay-Appleton	2%
St. Louis	2%
Washington DC-Baltimore	2%
Columbus	2%
Buffalo-Rochester	2%

47%

of visitors came from
17 markets

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

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Travel Party Profile
Oct – Dec 2019

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Travel Party Size and Composition

Travel Party Size
Visitors traveled in a party composed of **2.9**[1] people.

Travel with Children
21% of visitors traveled with children under the age of 18.

Solo traveler	15%
2 people	50%
3 people	7%
4 people	10%
5+ people	18%

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

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Travel Party Profile
Oct – Dec 2019

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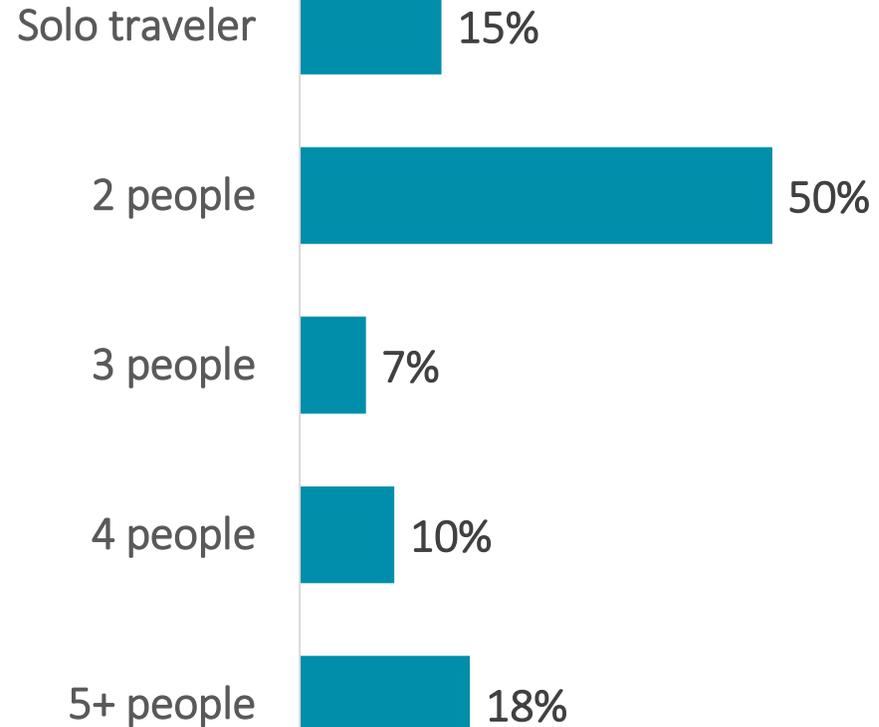
Travel Party Type

43% of visitors traveled as a couple, while 30% traveled as a family.

Couple — 43%
Family — 30%
Single — 15%
Group of couples/friends — 9%
With business associates — 2%
In a tour group — 1%

THE BEACHES OF FORT MYERS AND SANIBEL

Travel Party Profile
Oct – Dec 2019

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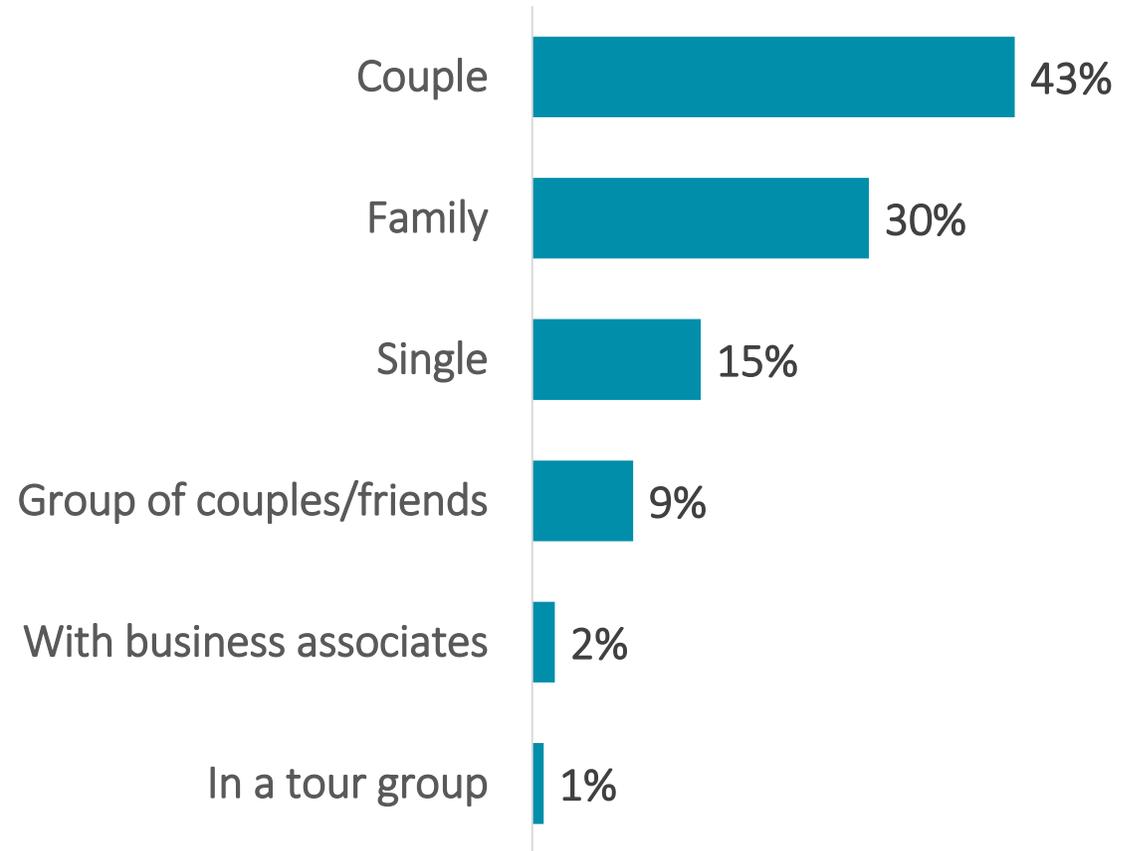
Age

Average Age

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

Age	Percent
Younger than 25	6%
25-39	17%
40-54	30%
55-69	37%
70+	10%

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Travel Party Profile
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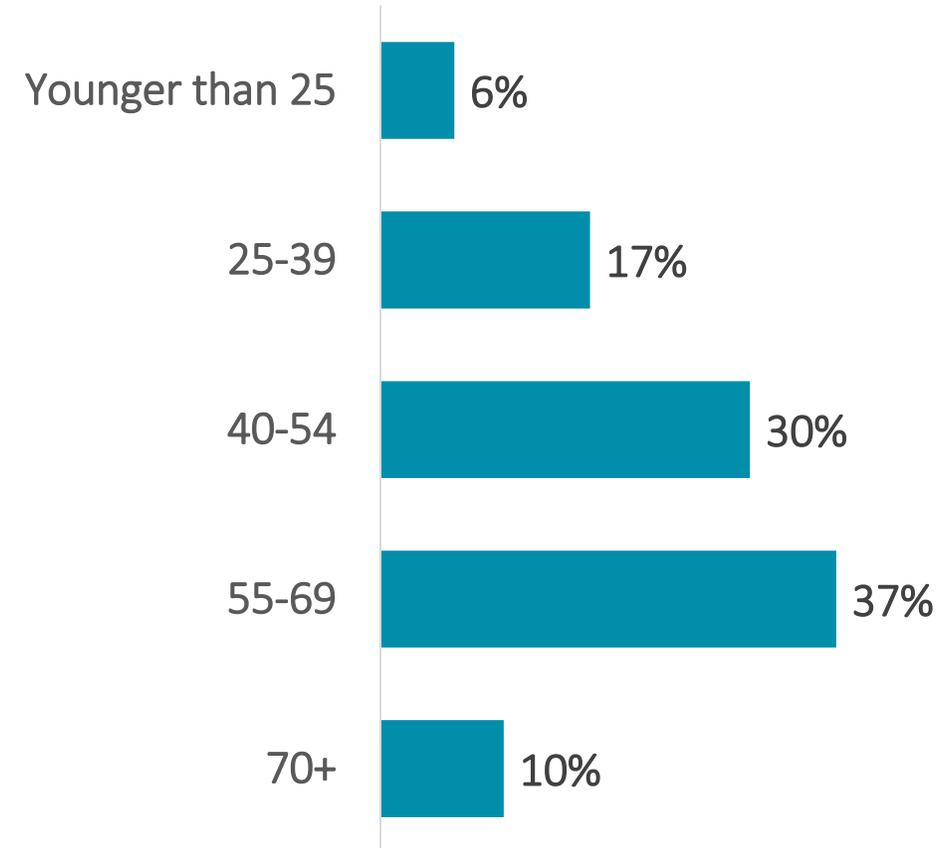
Household Income

Median Household Income
Oct – Dec visitors had a median household income of **$114,500.**

Estimate Average Household Income
The estimated average household income was **$133,100.**

Income Range	Percent
<$50,000	9%
$50,000 - $74,999	12%
$75,000 - $99,999	18%
$100,000 - $124,999	19%
$125,000 - $149,999	13%
$150,000 - $199,999	14%
$200,000 - $249,999	8%
$250,000 and over	7%

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Travel Party Profile
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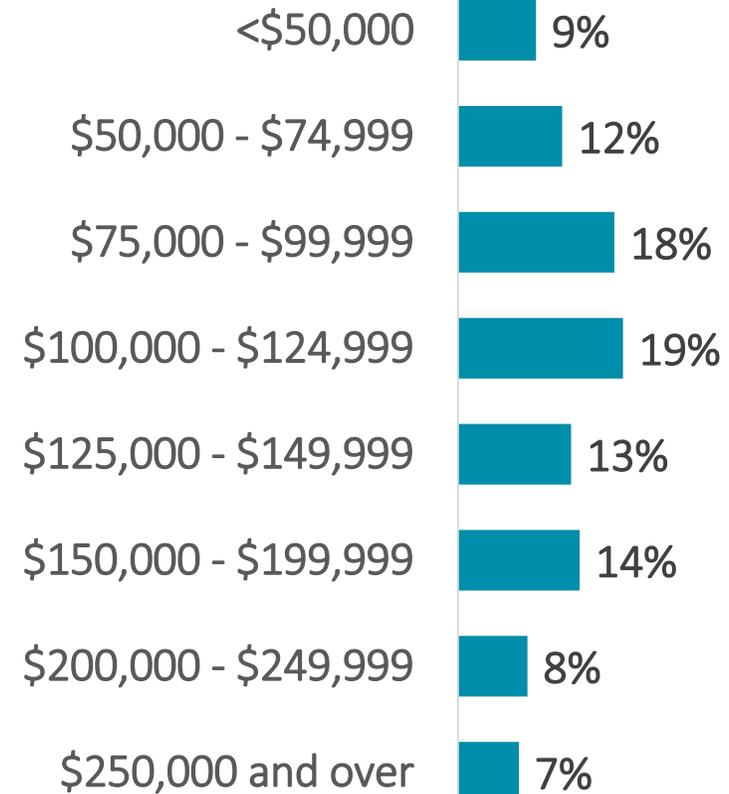
Marital Status

Married   Single   Other

Travel Party Profile
Oct – Dec 2019
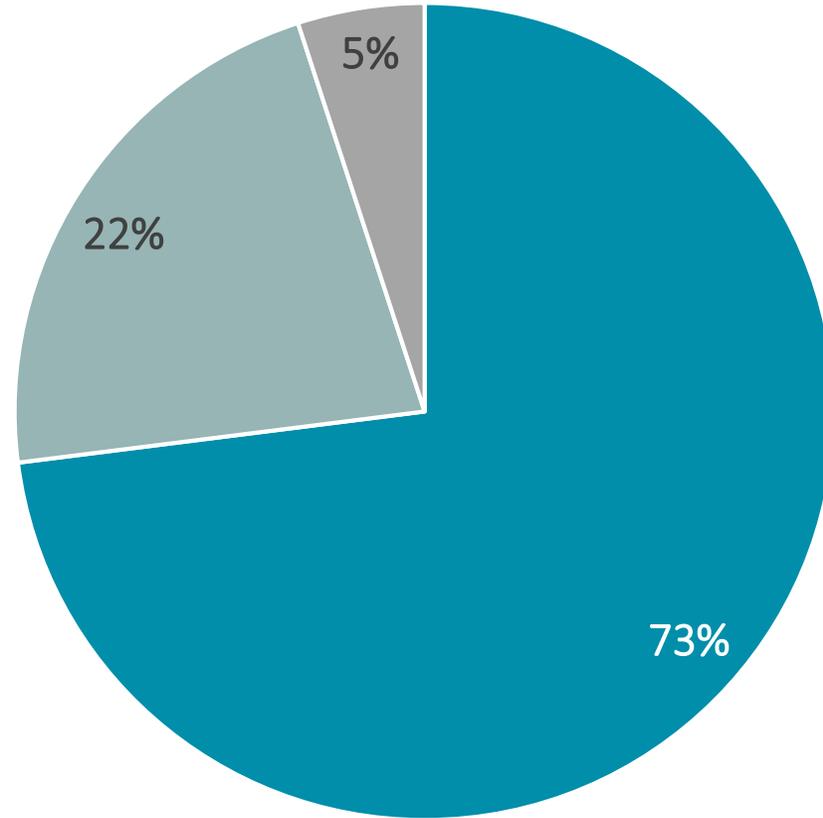
Education

College Education
66% of Oct – Dec visitors were college graduates.

Some high school or high school degree — 10%

Some college or Associate degree — 24%

College Graduate — 42%

Post Graduate work or degree — 24%

THE BEACHES OF
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Travel Party Profile
Oct – Dec 2019

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Race/Ethnicity

Caucasion or white	76%
Hispanic	6%
African American	6%
Asian	4%
Other	8%

Travel Party Profile
Oct – Dec 2019

Gender

43%

57%

■ Male ■ Female

Travel Party Profile
Oct – Dec 2019

Visitor Journey: Trip Experience

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

Accommodations

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

Hotel/Motel/Resort/B&B — 36%

Condo/Vacation rental — 30%

Non-paid accommodations — 27%

Day tripper — 5%

RV Park/Campground — 2%

THE BEACHES OF
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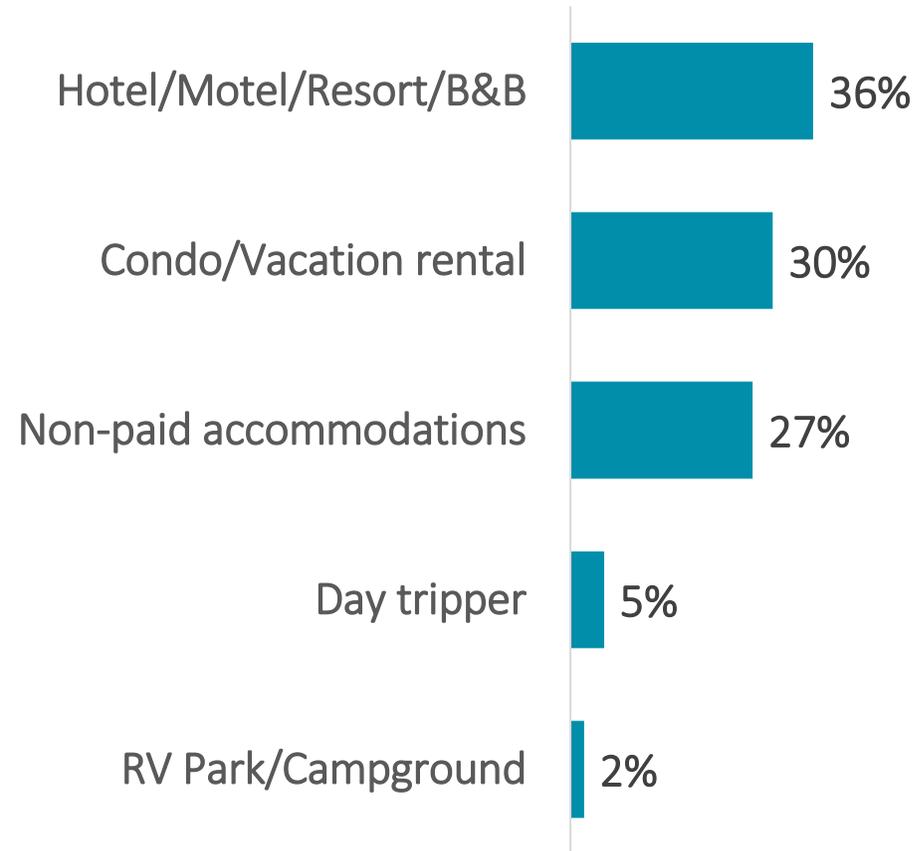
Nights Stayed

All Visitors
Visitors spent 7.8^1 nights in The Beaches of Fort Myers & Sanibel.

Visitors Staying in Paid Accommodations
Visitors staying in paid accommodations spent 6.8^2 nights in The Beaches of Fort Myers & Sanibel.
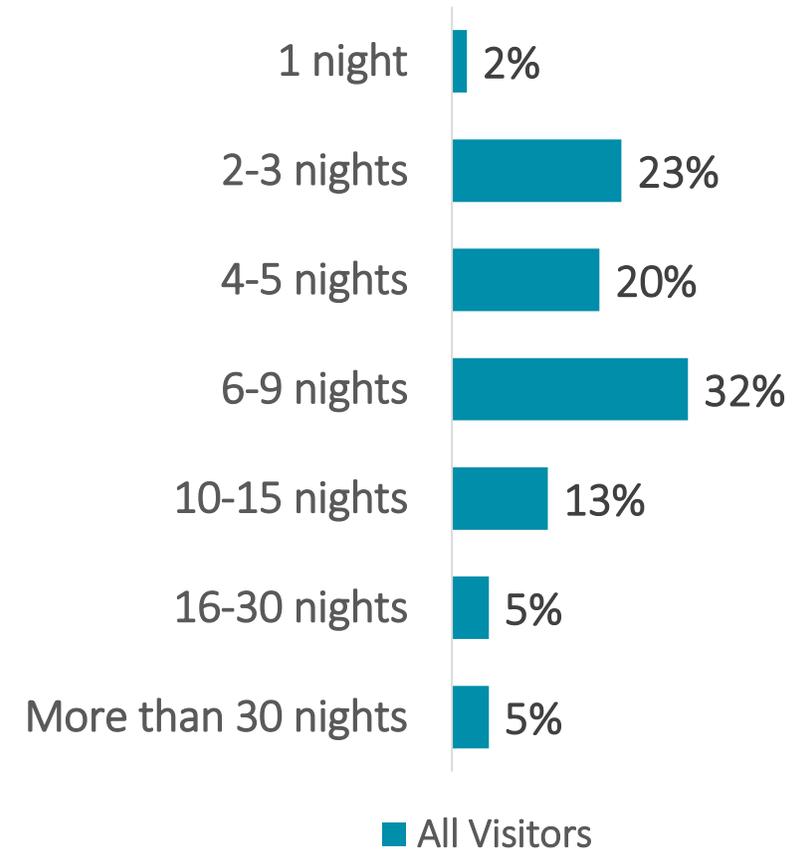
[1]When including extended stay visitors, average nights stayed for all visitors was 8.8 nights. Source: Visitor Tracking Survey
[2]When including extended stay visitors, average nights stayed for visitors staying in paid accommodations was 7.3 nights. Source: Visitor Tracking Survey

Nights	All Visitors
1 night	2%
2-3 nights	23%
4-5 nights	20%
6-9 nights	32%
10-15 nights	13%
16-30 nights	5%
More than 30 nights	5%

■ All Visitors

THE BEACHES OF FORT MYERS AND SANIBEL

Travel Party Profile
Oct – Dec 2019

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First Time and Experienced Visitors

First Time vs. Repeat Visitors
30% of visitors had made 11+ visits, while **20%** were visiting for the first time.

First-time — 20%

2-5 visits — 32%

6-10 visits — 18%

11+ visits — 30%

THE BEACHES OF
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Visitor Activities

Activity	Percentage
Beaches	67%[1]
Relax & unwind	61%
Dining	60%
Shopping	40%
Nature, environment, bird watching	38%
Visiting friends/relatives	29%
Attractions	21%
Biking, hiking etc.	18%
Water sports	16%
Photography	15%
Golf or tennis	12%
Bars, nightlife	12%
Fishing	11%
Special event	9%
Museums, history, etc.	9%
Culture	9%
Guided tours	7%
Special occasion	7%
Sporting event	6%
Spas	4%
Business conference or meeting	3%
Diving/snorkeling	2%
Volunteering	1%
Other	3%

[1]Multiple responses permitted.

Travel Party Profile
Oct – Dec 2019

THE BEACHES OF
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RESEARCH

Reason for Visiting vs. Visitor Activities

Reason for Visiting | **Visitor Activities**

Key Reasons for Visiting

	Reason for Visiting	Activity	Visitor Activities
38%[1]		Beach	67%[2]
38%		Relax and unwind	61%
25%		Visiting friends & relatives	29%
15%		Nature	38%
8%		Fishing	11%
7%		Special occasion	7%
6%		Attractions	21%
5%		Sporting events	6%
5%		Biking, hiking, etc.	18%
5%		Culture	9%
5%		Golf or tennis	12%
5%		Photography	15%
4%		Shopping	40%
4%		Special event	9%
3%		Business	3%
3%		Guided Tours	7%
3%		Museums, history	9%
2%		Water sports	16%
1%		Diving/snorkeling	2%
1%		Volunteering	1%

Trip Enhancements

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

THE BEACHES OF FORT MYERS AND SANIBEL

Travel Party Profile
Oct – Dec 2019

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Attractions Visited

Attraction	Percentage
Beaches	75%[1]
Fort Myers Beach Pier	32%
Sanibel Lighthouse	30%
Edison & Ford Winter Estates	24%
Miromar Outlets Mall	20%
Sanibel Outlets	19%
J.N. Ding Darling National Wildlife Refuge	16%
Periwinkle Place	14%
Shell Factory and Nature Park	8%
Bell Tower Shops	7%
Coconut Point Mall	6%
Gulf Coast Town Center	6%
Manatee Park	3%
Broadway Palm Dinner Theater	3%
Bailey-Matthews Shell Museum	2%
Barbara B. Mann Performing Arts Hall	2%
Other	4%
None	10%

[1]Multiple responses permitted.

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Travel Party Profile
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Community Stayed

Community	Percentage
Fort Myers	22%
Sanibel Island	22%
Fort Myers Beach	20%
Cape Coral	15%
Bonita Springs	5%
Captiva Island	3%
Estero	2%
North Fort Myers	2%
Lehigh Acres	1%
Pine Island	1%
Boca Grande/Outer Island	1%
Along I-75	1%
None/not staying overnight	5%

THE BEACHES OF
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Travel Party Profile
Oct – Dec 2019

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Visitor Journey: Post-Trip Evaluation

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

Post-Trip Evaluation
Oct – Dec 2019

Satisfaction

Likely to recommend — 93%

Likely to return — 93%

Likely to return next year — 63%

Satisfaction Ratings

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2018	2019	2018	2019	2018	2019	2018	2019
Likely to Recommend	81%	90%	88%	95%	86%	92%	92%	95%
Likely to Return	83%	88%	94%	95%	91%	90%	88%	93%
Likely to Return Next Year	33%	34%	57%	69%	68%	52%	56%	66%

Post-Trip Evaluation
Oct – Dec 2019

Satisfaction

Satisfaction with Overall Visit
- 67% Very satisfied
- 29% Satisfied
- 1% Neither
- 1% Dissatisfied/Very dissatisfied
- 2% Don't know

Satisfaction with Customer Service
- 60% Very satisfied
- 33% Satisfied
- 2% Neither
- 1% Dissatisfied/Very dissatisfied
- 4% Don't know

Legend: ■ Very satisfied ■ Satisfied ■ Neither ■ Dissatisfied/Very dissatisfied ■ Don't know

THE BEACHES OF FORT MYERS AND SANIBEL

Post-Trip Evaluation
Oct – Dec 2019

downs & st. germain
R E S E A R C H

Satisfaction Ratings: Overall Visit

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2018	2019	2018	2019	2018	2019	2018	2019
Very Satisfied	45%	68%	57%	66%	54%	65%	59%	80%
Satisfied	45%	27%	38%	30%	39%	31%	37%	16%

Satisfaction Ratings: Customer Service

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2018	2019	2018	2019	2018	2019	2018	2019
Very Satisfied	43%	66%	43%	59%	44%	60%	47%	74%
Satisfied	45%	28%	45%	35%	45%	35%	40%	19%

Post-Trip Evaluation
Oct – Dec 2019

Satisfaction Ratings: Quality of Accommodations

Quality of Accommodations
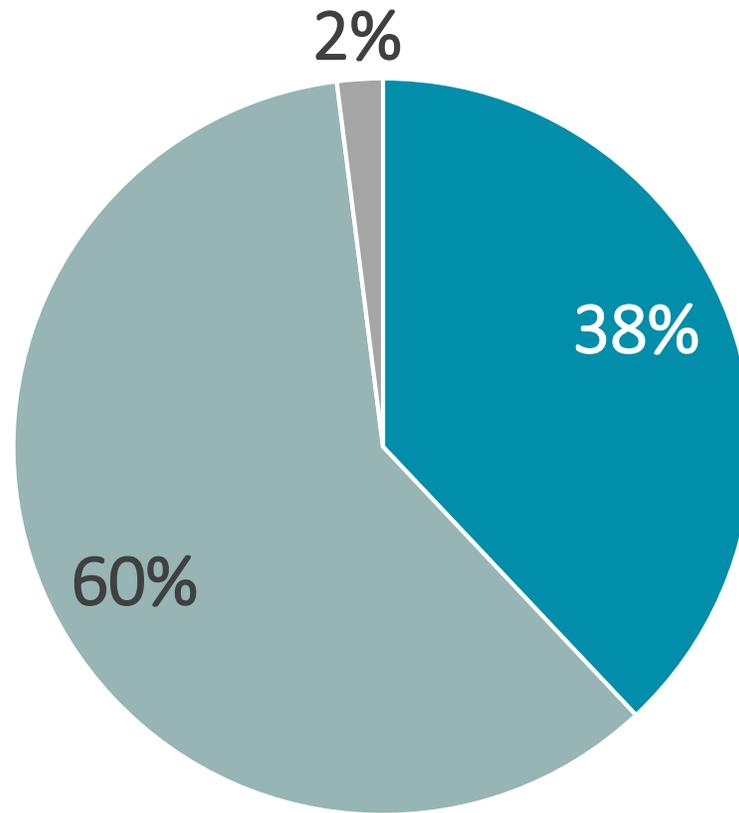
- Far exceeded/exceeded expectations
- Met expectations
- Did not meet/far below expectations

Post-Trip Evaluation
Oct – Dec 2019

Satisfaction Ratings: Quality of Accommodations

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2018	2019	2018	2019	2018	2019	2018	2019
Exceeded Expectations	44%	36%	36%	37%	37%	37%	41%	41%
Met Expectations	53%	61%	63%	62%	61%	62%	57%	55%
Did Not Meet Expectations	3%	3%	1%	1%	2%	1%	2%	4%

THE BEACHES OF FORT MYERS AND SANIBEL

Post-Trip Evaluation
Oct – Dec 2019

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Attribute Ratings

Over **95%** of visitors gave high experience ratings for warm weather, peace, and family atmosphere in The Beaches of Fort Myers & Sanibel.
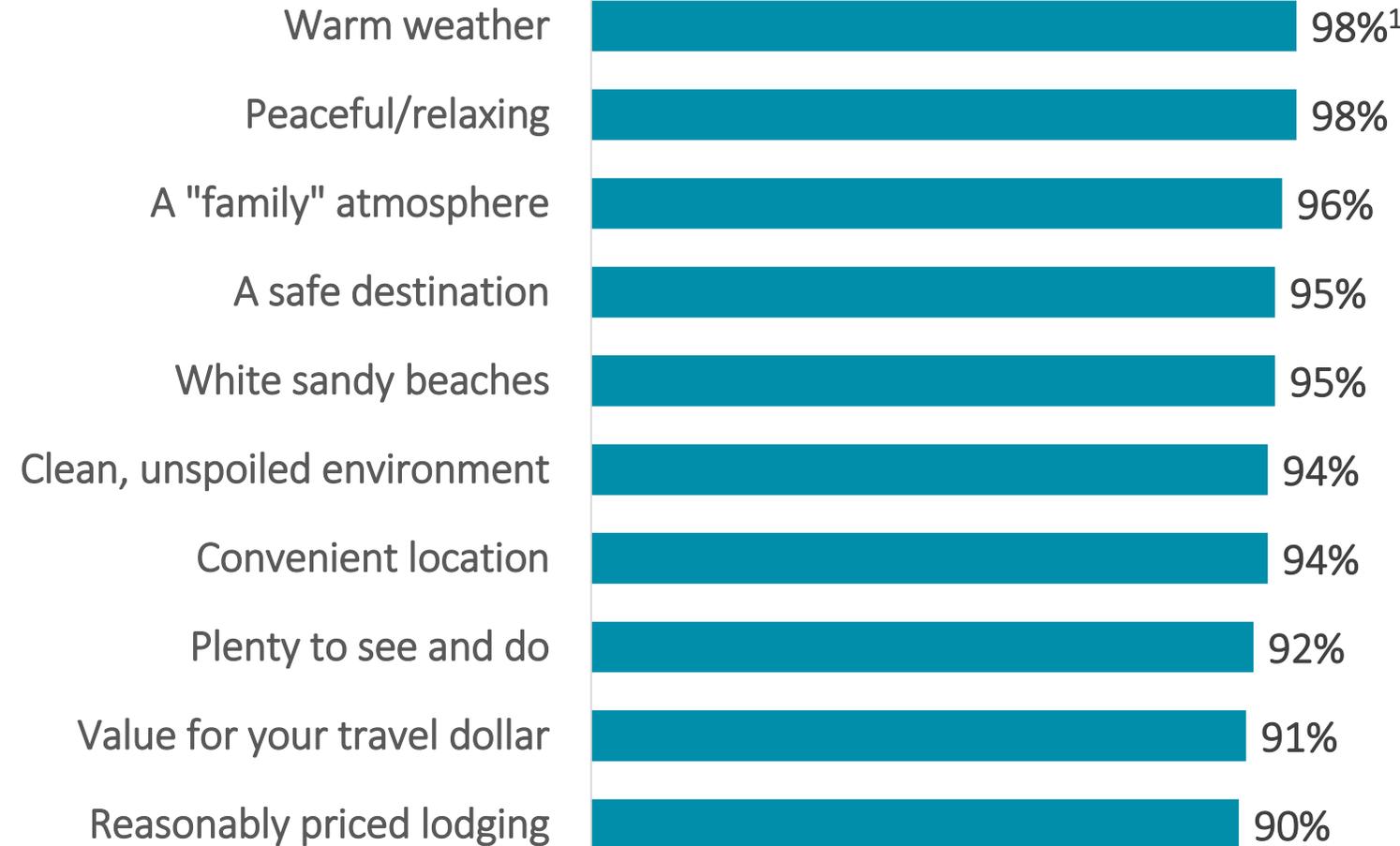
Attribute	Rating
Warm weather	98%[1]
Peaceful/relaxing	98%
A "family" atmosphere	96%
A safe destination	95%
White sandy beaches	95%
Clean, unspoiled environment	94%
Convenient location	94%
Plenty to see and do	92%
Value for your travel dollar	91%
Reasonably priced lodging	90%

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

Post-Trip Evaluation
Oct – Dec 2019

Vacation Attribute Influence vs. Ratings
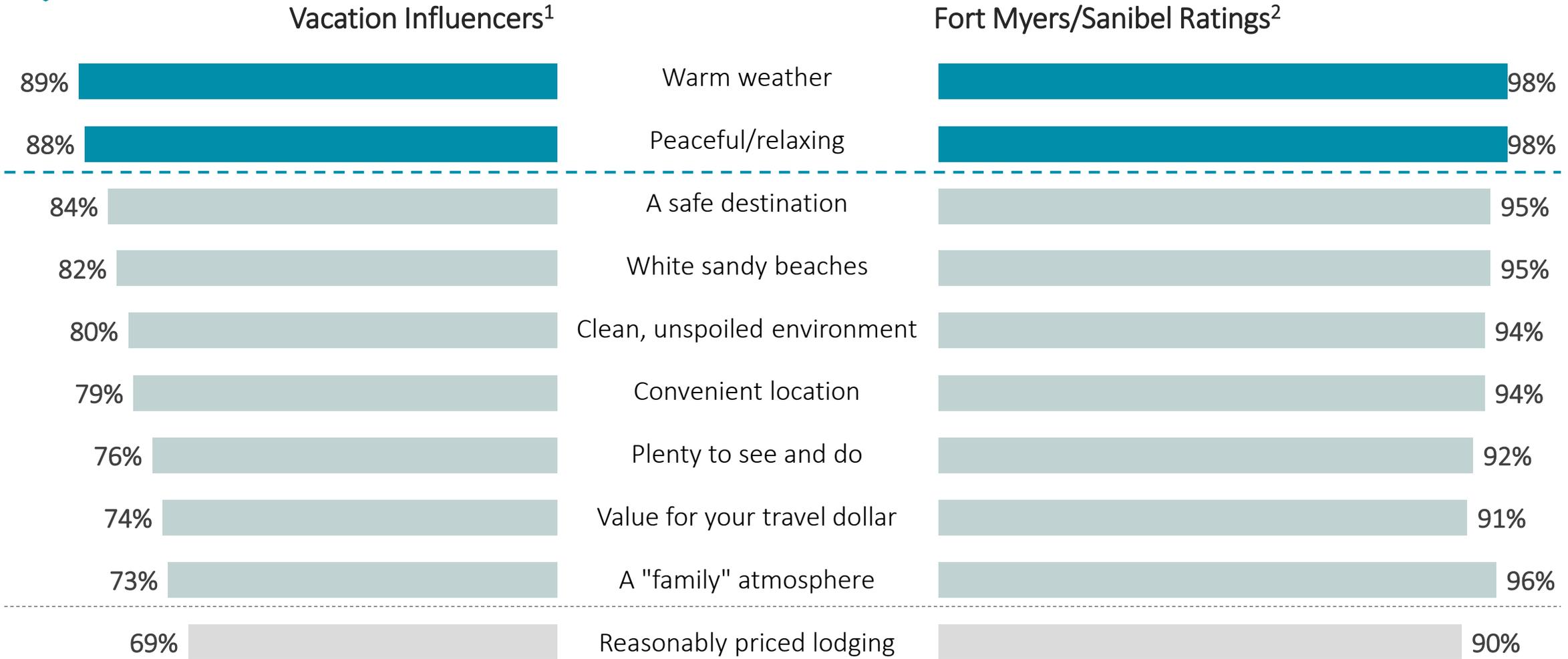
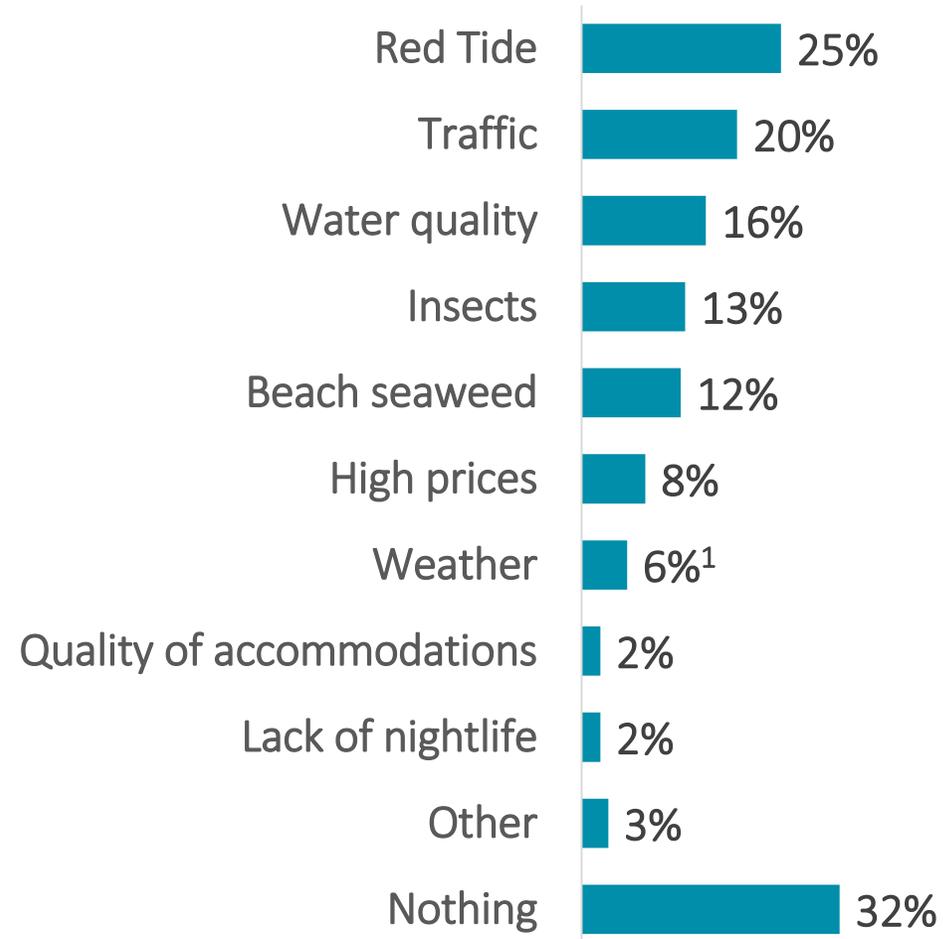| Vacation Influencers[1]		Fort Myers/Sanibel Ratings[2]
89%	Warm weather	98%
88%	Peaceful/relaxing	98%
84%	A safe destination	95%
82%	White sandy beaches	95%
80%	Clean, unspoiled environment	94%
79%	Convenient location	94%
76%	Plenty to see and do	92%
74%	Value for your travel dollar	91%
73%	A "family" atmosphere	96%
69%	Reasonably priced lodging	90%

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

THE BEACHES OF FORT MYERS AND SANIBEL

Post-Trip Evaluation
Oct – Dec 2019

downs & st. germain
R E S E A R C H

Visitor Concerns

37% of visitors were concerned about water quality and Red Tide

Concern	Percentage
Red Tide	25%
Traffic	20%
Water quality	16%
Insects	13%
Beach seaweed	12%
High prices	8%
Weather	6%[1]
Quality of accommodations	2%
Lack of nightlife	2%
Other	3%
Nothing	32%

[1]Multiple responses permitted.

THE BEACHES OF
FORT MYERS AND SANIBEL

Post-Trip Evaluation
Oct – Dec 2019

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Area Descriptions

Visitors describe The Beaches of Fort Myers & Sanibel as having **beautiful beaches** and being **relaxing and peaceful**.

Wonderful place to visit	37%
Relaxing & peaceful	34%
Beautiful beaches	34%
Natural	16%
Fun things to do	13%
Warm weather	10%[1]
Great geographic location	7%
Family friendly	6%
Friendly people	5%
Nice restaraunts	5%
Clean	4%
Water quality/seaweed issues	4%
Crowded, lots of traffic	2%
Safe	2%
Good place to retire	2%
Expensive	1%
Convenient, walkable	1%

[1]Coded verbatim responses; multiple responses permitted.

THE BEACHES OF FORT MYERS AND SANIBEL

Post-Trip Evaluation
Oct – Dec 2019

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Area Descriptions

Wonderful Place to Visit

- "Sometimes you just need to get away and this is a great place to do that."
- "Good vacation. Everyone should experience it once."
- "Spending time with friends on the beach with a fishing pole; there is nothing better."
- "Almost perfect. Ideal for a fall vacation trip."

Relaxing & Peaceful

- "Unwinding on the white beaches is great."
- "We love it here because it is not commercialized and has friendly people."
- "Peaceful and relaxing with plenty to do."
- "Relaxing, unspoiled, beautiful. Something for everyone."

Area Descriptions

Beautiful Beaches

- "Beautiful beaches and beautiful weather. Lots to do and a peaceful, relaxing time."
- "Sunset on the beach is beautiful. I watched someone get engaged on the beach."
- "It's more beautiful now then our last visit 18 years ago."
- "A very beautiful place to relax with plenty to do."

Natural

- "Focused on nature and natural things. Perfect temperature and beautiful."
- "Non-commercial and quiet beaches on Florida's Gulf Coast. Great for shell collecting and unwinding."
- "I only know Sanibel Island. Unspoiled, unique, relaxing, low key, wonderful nature preserves."
- "The wildlife is astonishing to see."

THE BEACHES OF FORT MYERS AND SANIBEL

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Occupancy Barometer: January – March Reservations

Jan – March Reservations	Oct – Dec 2018	Oct – Dec 2019
Up	34%	49%
Same	24%	45%
Down	41%	6%
Not Sure	1%	0%

Occupancy Barometer: April – June Reservations

April – June Reservations	Oct – Dec 2018	Oct – Dec 2019
Up	19%	33%
Same	27%	63%
Down	34%	4%
Not Sure	20%	0%

Year-Over-Year Comparisons

THE BEACHES OF FORT MYERS AND SANIBEL

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R E S E A R C H

Economic Impact

Visitor & Lodging Statistics	Oct – Dec 2018	Oct – Dec 2019	% Change
Visitors	1,099,800	1,249,500	+13.6%
Room Nights	$1,296,000	1,456,300	+12.4%
Direct Expenditures	$684,181,400	$743,544,500	+8.7%
Total Economic Impact	$1,111,110,600	$1,207,516,300	+8.7%
Occupancy	61.8%	63.1%	+2.1%
ADR	$121.66	$137.39	+12.9%
RevPAR	$75.14	$86.69	+15.3%

THE BEACHES OF FORT MYERS AND SANIBEL

Economic Impact
Oct – Dec 2019

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Jobs, Wages and Taxes Supported by Tourism

	Oct – Dec 2018	Oct – Dec 2019	% Change
Direct Jobs	9,307	9,992	+7.4%
Total Jobs	12,995	13,974	+7.5%
Direct Wages	$210,200,000	$224,149,500	+6.6%
Total Wages	$342,300,000	$374,473,700	+9.4%
Direct Local Taxes	$21,100,000	$22,678,100	+7.5%
Total Local Taxes	$38,800,000	$40,814,100	+5.2%
Direct State Taxes	$50,100,000	$52,866,000	+5.5%
Total State Taxes	$74,200,000	$79,092,300	+6.6%

THE BEACHES OF FORT MYERS AND SANIBEL

Economic Impact on Destination
Oct – Dec 2019

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Visitor Type

Visitor Type	Oct – Dec 2018	Oct – Dec 2019
Visitors in Paid Accommodations	68%	68%
Visitors in Non-Paid Accommodations	32%	27%
Day Trippers	NA	5%

THE BEACHES OF FORT MYERS AND SANIBEL

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Pre-Visit

Planned trip in advance	Oct – Dec 2018	Oct – Dec 2019
1 week or less	5%	6%
2-4 weeks	5%	9%
1-2 months	12%	15%
3-6 months	37%	34%
6 months or more	34%	30%
Not sure	7%	6%

Considered Other Destinations	Oct – Dec 2018	Oct – Dec 2019
Yes	15%	10%
No	85%	90%

Pre-Visit

Trip Planning Websites[1]	Oct – Dec 2018	Oct – Dec 2019
Airline websites	34%	36%
Trip Advisor	21%	17%
Hotel websites	22%	17%
Search engines	22%	16%
Airbnb, VRBO, HomeAway	11%	15%
Online Travel Agency	20%	15%
Vacation rental websites	10%	11%
Visit Florida	8%	7%
Facebook	7%	6%
www.FortMyers-Sanibel.com	7%	6%
Beaches of Fort Myers & Sanibel Social Media	NA	6%
Travel reviews, blogs, stories, etc.	NA	4%
Instagram	NA	1%
YouTube, Hulu, Pandora	NA	1%
None/Don't visit websites	21%	18%
Other	10%	6%

[1]Multiple responses permitted.

THE BEACHES OF FORT MYERS AND SANIBEL

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R E S E A R C H

Pre-Visit

Information Requests[1]	Oct – Dec 2018	Oct – Dec 2019
Call hotel/motel/condo	9%	10%
Visitor guide	2%	3%
Fort Myers-Sanibel E-newsletter	1%	2%
Call local Chamber of Commerce	1%	2%
Call VCB	1%	1%
None/Did not request info	82%	79%
Other	6%	4%

[1]Multiple responses permitted.

THE BEACHES OF
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Pre-Visit

Recall of Lee County Promotions	Oct – Dec 2018	Oct – Dec 2019
Yes	42%	30%
No	42%	56%
Can't recall	16%	15%

Characteristics influencing decision to visit Lee County (top 2 boxes)	Oct – Dec 2018	Oct – Dec 2019
Warm weather	84%	89%
Peaceful/relaxing	79%	88%
A safe destination	72%	84%
White sandy beaches	73%	82%
Clean, unspoiled environment	65%	80%
Convenient location	66%	79%
Plenty to see and do	56%	76%
Value for your travel dollar	58%	74%
A "family" atmosphere	55%	73%
Reasonably priced lodging	48%	69%

THE BEACHES OF FORT MYERS AND SANIBEL

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Pre-Visit

Transportation	Oct – Dec 2018	Oct – Dec 2019
Fly	77%	70%
Drive a personal vehicle	18%	24%
Drive a rental vehicle	4%	4%
Drive a RV	1%	1%
Travel by bus	0%	1%
Other	1%	1%

Airport Used	Oct – Dec 2018	Oct – Dec 2019
Southwest Florida International	81%	69%
Punta Gorda	8%	10%
Ft. Lauderdale international	2%	9%
Miami International	2%	4%
Orlando International	3%	4%
Tampa International	3%	4%
Other	2%	1%

THE BEACHES OF FORT MYERS AND SANIBEL

downs & st. germain
R E S E A R C H

Travel Party Profile

Visitor Origin	Oct – Dec 2018	Oct – Dec 2019
Florida	9%	10%
Southeast	17%	16%
Northeast	19%	18%
Midwest	36%	37%
West	5%	6%
Canada	4%	3%
United Kingdom	2%	2%
Germany	4%	5%
Other Europe	2%	2%
Other international	2%	1%

Visitor Origin	Oct – Dec 2018	Oct – Dec 2019
Cincinnati	5%	6%
New York City	6%	5%
Chicago	5%	4%
Miami-Ft. Lauderdale	5%	3%
Minneapolis	3%	3%
Indianapolis	3%	3%
Detroit	4%	3%

Travel Party Profile
Oct – Dec 2019

Travel Party Profile

Travel Parties	Oct – Dec 2018	Oct – Dec 2019
Mean travel party size	3.0	2.9[1]
Travel with children under age 18	26%	21%

Travel Party Composition	Oct – Dec 2018	Oct – Dec 2019
Couple	43%	44%
Family	38%	30%
Single	9%	15%
Group of couples/friends	10%	9%
In a tour group	0%	1%
With business associates	0%	2%

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

Travel Party Profile

Marital Status	Oct – Dec 2018	Oct – Dec 2019
Married	79%	73%
Single	12%	22%
Other	9%	5%

Age	Oct – Dec 2018	Oct – Dec 2019
Average age	53	52

Household Income	Oct – Dec 2018	Oct – Dec 2019
Median Income	$107,800	$114,500

Travel Party Profile
Oct – Dec 2019

Trip Experience

Length of Stay	Oct – Dec 2018	Oct – Dec 2019
Average nights in The Beaches of Fort Myers & Sanibel	8.3	7.8

First time/Repeat Visitors	Oct – Dec 2018	Oct – Dec 2019
First-time	19%	20%
Repeat	81%	80%

Trip Experience

Activities[1]	Oct – Dec 2018	Oct – Dec 2019
Beaches	86%	67%
Relax & unwind	67%	61%
Dining	72%	60%
Shopping	53%	40%
Nature, environment, bird watching	35%	38%
Visiting friends/relatives	34%	29%
Attractions	21%	21%
Biking, hiking etc.	21%	18%
Water sports	24%	16%
Photography	15%	15%
Bars, nightlife	16%	12%
Golf or tennis	17%	12%
Fishing	8%	11%
Special event	NA	9%
Culture	6%	9%
Museums, history, etc.	NA	9%
Guided tours	4%	7%
Special occasion	NA	7%
Sporting event	12%	6%
Spas	NA	4%
Business conference or meeting	NA	3%
Diving/snorkeling	1%	2%
Volunteering	NA	1%
Other	3%	3%

[1]Multiple responses permitted.

Trip Experience
Oct – Dec 2019

Trip Experience

Attractions[1]	Oct – Dec 2018	Oct – Dec 2019
Beaches	79%	75%
Fort Myers Beach Pier	38%	32%
Sanibel Lighthouse	25%	30%
Edison & Ford Winter Estates	17%	24%
Miromar Outlets Mall	30%	20%
Sanibel Outlets	21%	19%
J.N. Ding Darling National Wildlife Refuge	13%	16%
Periwinkle Place	11%	14%
Shell Factory and Nature Park	7%	8%
Bell Tower Shops	11%	7%
Gulf Coast Town Center	10%	6%
Coconut Point Mall	9%	6%
Broadway Palm Dinner Theater	2%	3%
Manatee Park	4%	3%
Bailey-Matthews Shell Museum	2%	2%
Barbara B. Mann Performing Arts Hall	1%	2%
None	7%	10%
Other	5%	4%

[1]Multiple responses permitted.

THE BEACHES OF FORT MYERS AND SANIBEL

downs & st. germain RESEARCH

Trip Experience

Area stayed	Oct – Dec 2018	Oct – Dec 2019
Sanibel Island	21%	22%
Fort Myers	25%	22%
Fort Myers Beach	19%	20%
Cape Coral	12%	15%
Bonita Springs	3%	5%
Captiva Island	1%	3%
Estero	3%	2%
North Fort Myers	3%	2%
Lehigh Acres	1%	1%
Pine Island	1%	1%
Boca Grande/Outer Island	1%	1%
Along I-75	1%	1%
None/not staying overnight	11%	5%

Post-Trip Evaluation

Loyalty metrics	Oct – Dec 2018	Oct – Dec 2019
Likely to recommend	87%	93%
Likely to return	92%	93%
Likely to return next year	53%	63%

Satisfaction with Accommodations	Oct – Dec 2018	Oct – Dec 2019
Exceeded expectations	37%	38%
Met expectations	61%	60%
Did not meet expectations	2%	2%

Post-Trip Evaluation

Satisfaction with Visit	Oct – Dec 2018	Oct – Dec 2019
Very satisfied	55%	67%
Satisfied	39%	29%
Neither	3%	2%
Dissatisfied/Very dissatisfied	1%	1%
Don't know	3%	2%

Satisfaction with Customer Service	Oct – Dec 2018	Oct – Dec 2019
Very satisfied	44%	60%
Satisfied	44%	33%
Neither	3%	2%
Dissatisfied/Very dissatisfied	1%	0%
Don't know	8%	4%

Post-Trip Evaluation

Visitor Concerns[1]	Oct – Dec 2018	Oct – Dec 2019
Red Tide	25%	25%
Traffic	26%	20%
Water quality	13%	16%
Insects	13%	13%
Beach seaweed	17%	12%
High prices	8%	8%
Weather	7%	6%
Quality of accommodations	3%	2%
Lack of nightlife	3%	2%
Nothing	33%	32%
Other	4%	3%

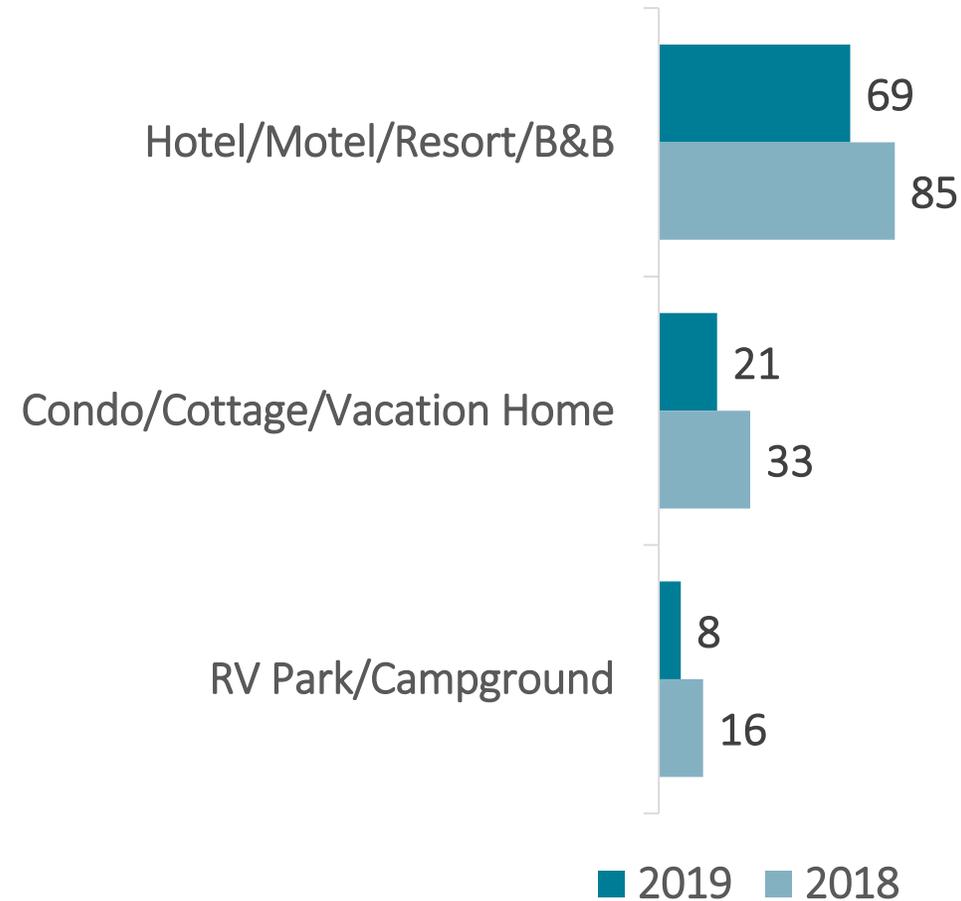[1]Multiple responses permitted.

Methodology

Methodology

- Economic Impact of tourism in Lee County is derived from:
  - Visitor Tracking Study
    - Internet survey & in-person interviews in public areas, hotels, & at events around Lee County
    - Sample size: 1,002 completed interviews
    - Target individuals: Oct – Dec visitors to Lee County
    - Data Collection: October 2019 – December 2019
  - Occupancy Study
    - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc., and the STR Report
    - Sample Size – data from 11,292 hotel/rental/campground units (98 properties) reporting to DSG, and 9,869 hotel units reporting to STR (84 properties)
  - IMPLAN Economic Impact Modeling software
    - IMPLAN models the way tourism dollars are spent and re-spent in other sectors of the economy, generating waves of economic activity, called multiplier effects. The model uses national industry data and county-level economic data to generate a series of multipliers, which in turn estimate the total economic implications of economic activity.
    - Over 1,500 organizations use IMPLAN, including FEMA, EPA, Federal Reserve Bank, and Bureau of Land Management.
  - Various government agencies and data sources
  - TDT collections provided by the Lee County VCB
  - Tourism database at Downs & St. Germain Research
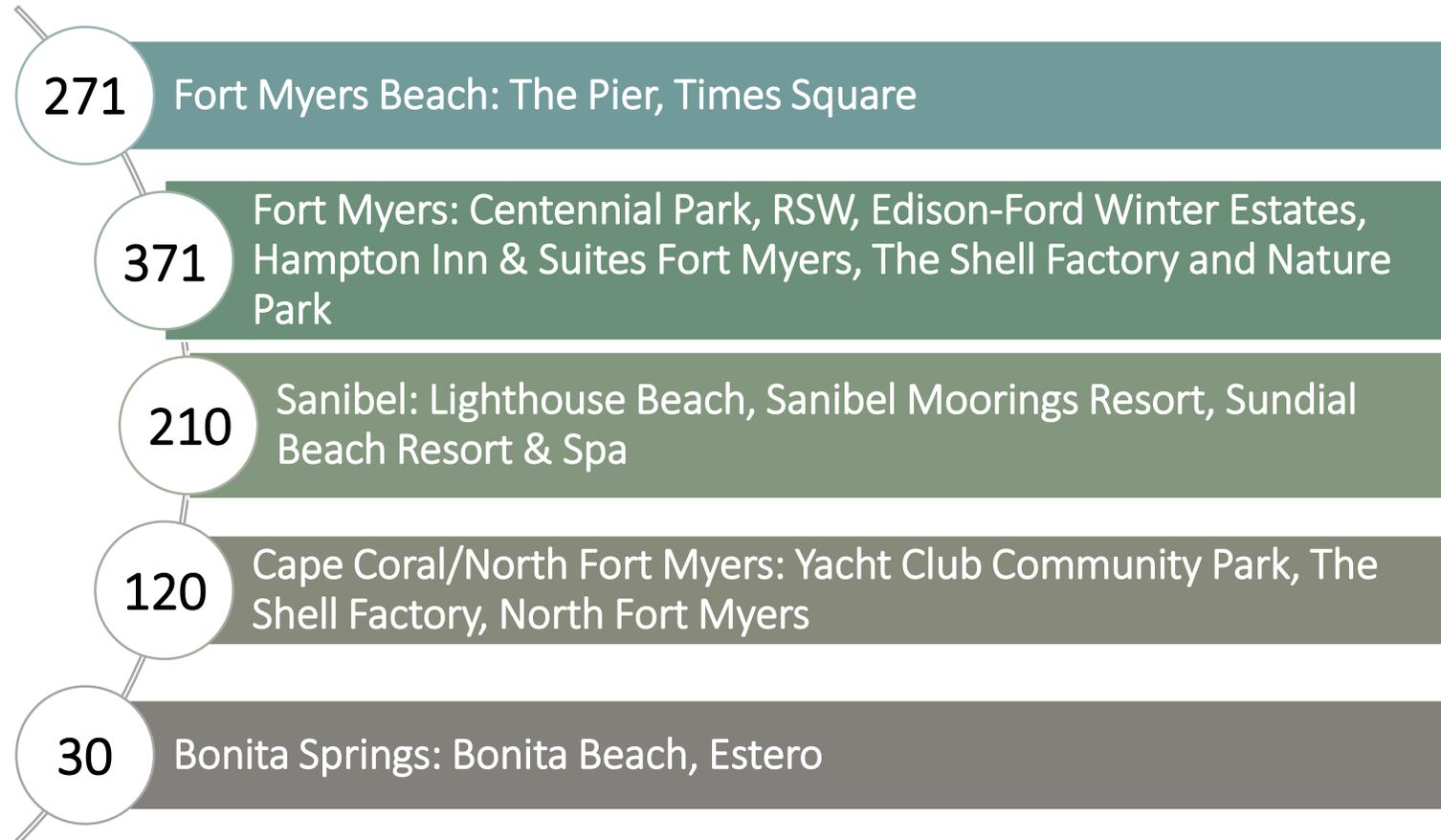
Methodology

- ## Occupancy Study
  - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc.
    - Sample Size – 98 completed interviews
    - Data Collection: January 2019 (for Oct – Dec 2019)
  - Total Sample Size – data from 11,292 hotel/rental/campground units reporting to DSG and 9,869 hotel units reporting to STR (representing 84 properties)

Number of Interviews

Hotel/Motel/Resort/B&B: 69 (2019), 85 (2018)
Condo/Cottage/Vacation Home: 21 (2019), 33 (2018)
RV Park/Campground: 8 (2019), 16 (2018)

■ 2019   ■ 2018

Methodology

- **1,002** visitor interviews were completed in the following areas:

271 — Fort Myers Beach: The Pier, Times Square

371 — Fort Myers: Centennial Park, RSW, Edison-Ford Winter Estates, Hampton Inn & Suites Fort Myers, The Shell Factory and Nature Park

210 — Sanibel: Lighthouse Beach, Sanibel Moorings Resort, Sundial Beach Resort & Spa

120 — Cape Coral/North Fort Myers: Yacht Club Community Park, The Shell Factory, North Fort Myers

30 — Bonita Springs: Bonita Beach, Estero

THE BEACHES OF
FORT MYERS
AND SANIBEL

Oct – Dec 2019

downs & st. germain
R E S E A R C H

The Beaches of Fort Myers & Sanibel

Lee County VCB

Oct – Dec 2019
Visitor Tracking & Occupancy Study

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