The Beaches of Fort Myers & Sanibel

Lee County VCB

April – June 2019

Visitor Tracking, Occupancy & Economic Impact Study

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Downs & St. Germain Research

THE BEACHES OF FORT MYERS AND SANIBEL

downs & st. germain RESEARCH

Introduction

Study Objectives: Map the Visitor Journey

Pre-Visit

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

Travel Party Profile

- Visitor origin
- Party size
- Party composition
- Demographics

Trip Experience

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

Post-Trip Evaluation

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

Economic Impact on Destination

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

Executive Summary

Visitor Journey: Economic Impact on Destination

Tourism Snapshot: April – June 2019[1]

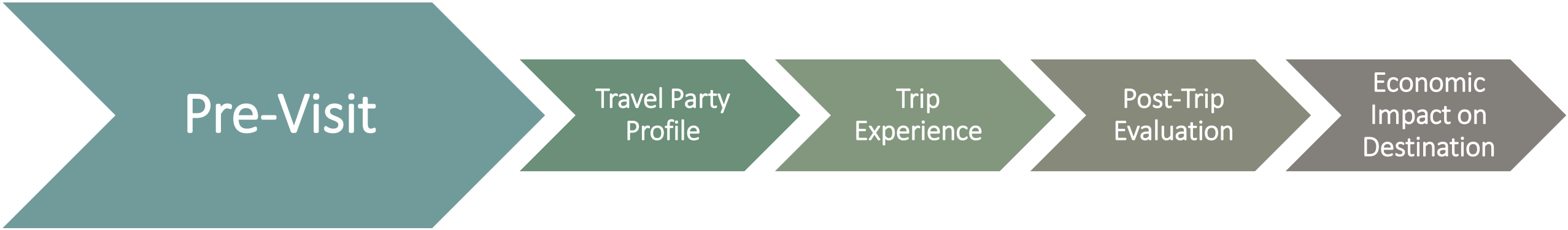
Visitor & Lodging Statistics	April – June 2018	April – June 2019	% Change
Visitors	1,345,200	1,262,500	-6.1%
Room Nights	1,287,000	1,309,000	+1.7%
Direct Expenditures[2]	$755,450,400	$727,686,800	-3.7%
Total Economic Impact[3]	$1,226,851,500	$1,181,763,400	-3.7%

[1] Year-over-year differences due to: 1. longer length of stay in 2019, 2. more available inventory in 2019, 3. 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.

April – June Lodging Statistics

63.6%	$130.52	$83.01
Occupancy	ADR	RevPAR
⬇2.9%	⬇0.5%	⬇3.4%

Visitor Journey: Pre-Visit



Trip Planning

→ 6 in 10 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

→ 14% of visitors considered choosing other destinations when planning their trips

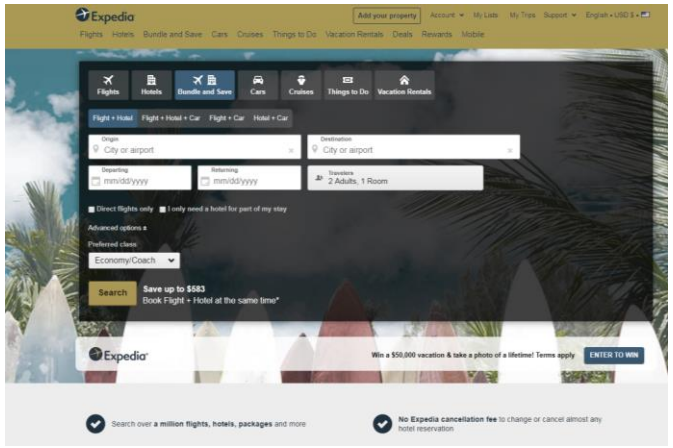
Trip Planning: Websites Used

→ 7 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]:

32% Airline websites

28% Search engines



19% Booking websites

[1]Multiple responses permitted.

Top Trip Influencers

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

91% Warm weather

90% Peaceful/relaxing

85% Safe destination

85% White sandy beaches

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

Top Reasons for Visiting

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

61% Vacation

56% Relax & unwind

54% Beach

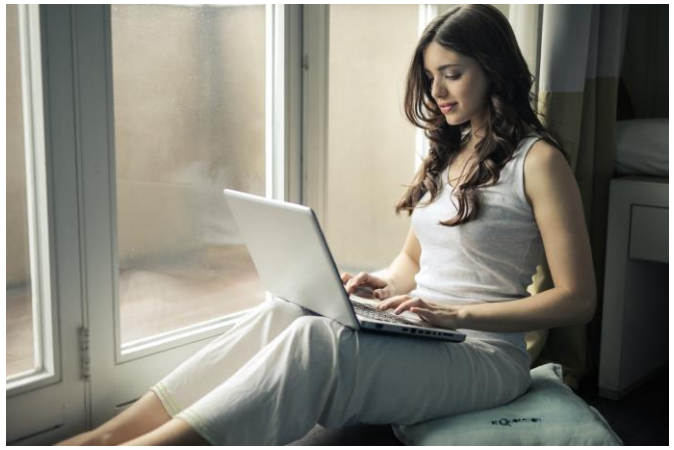
27% Visit friends & relatives

[1]Three responses permitted.

Promotions

→ **31%** of visitors recalled promotions in the past 6 months for The Beaches of Fort Myers & Sanibel

→ Top sources of recall include[1]:



40% Internet

34% TV

21% Social media

[1]Multiple responses permitted.

Booking

→Visitors used the following to book their trips:

51% Directly with hotel/condo

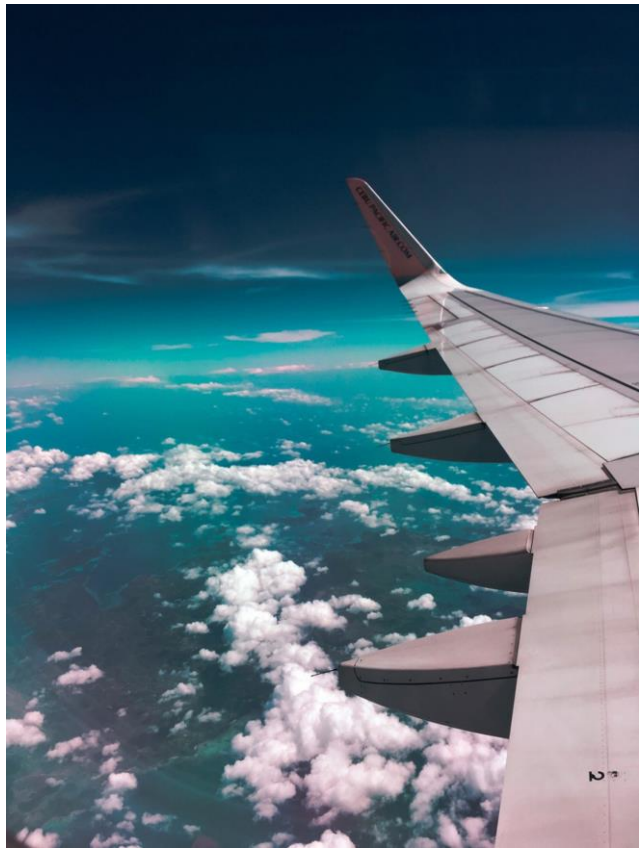
14% VRBO, HomeAway

14% Other online travel agency

7% Vacation rental company

5% Airbnb

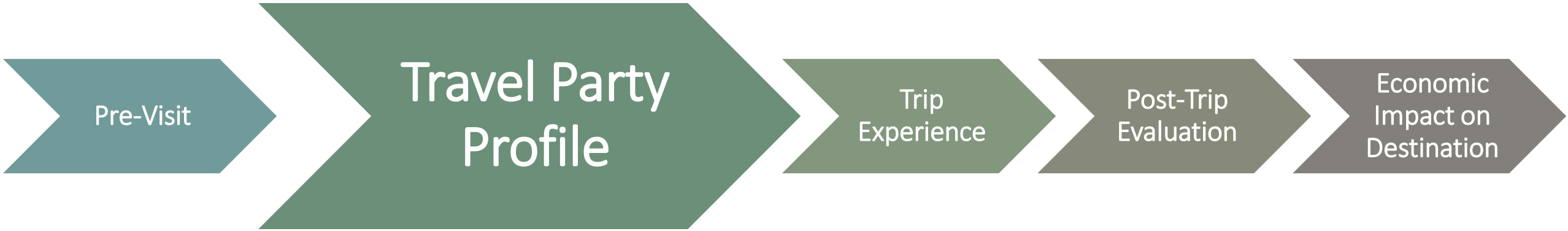
Transportation



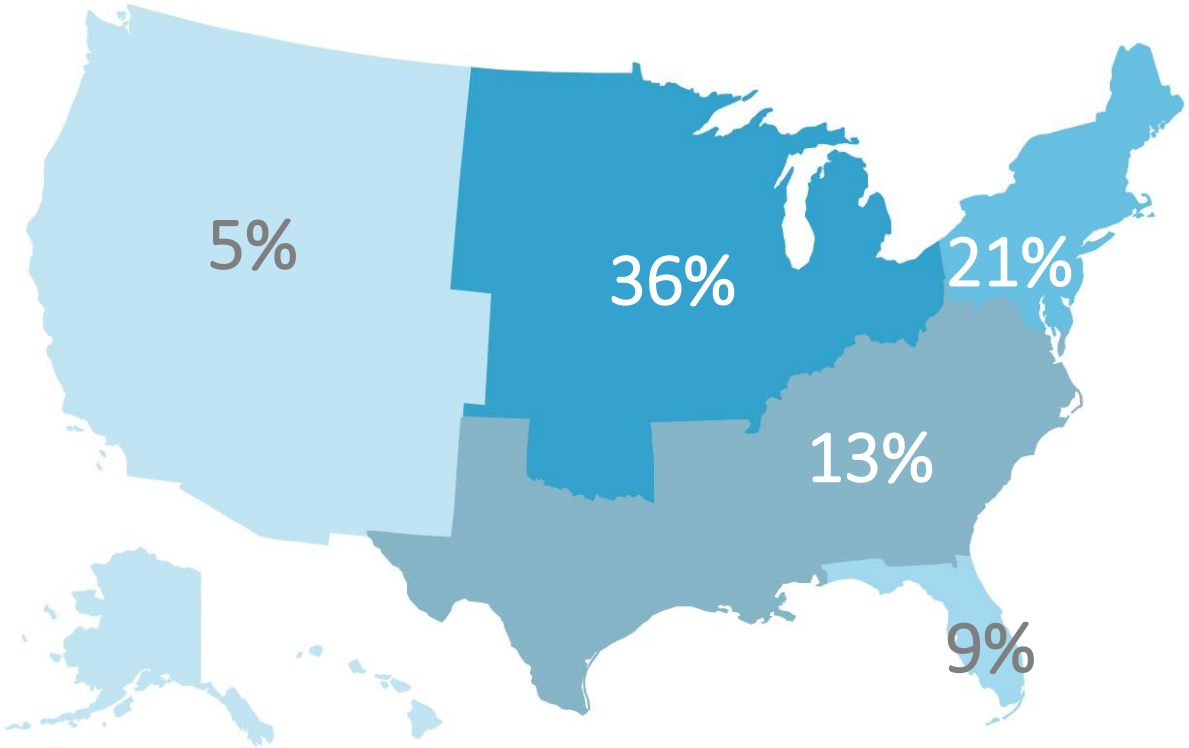
→ 69% of visitors flew to The Beaches of Fort Myers & Sanibel

→ 74% of visitors who flew to The Beaches of Fort Myers & Sanibel flew to RSW

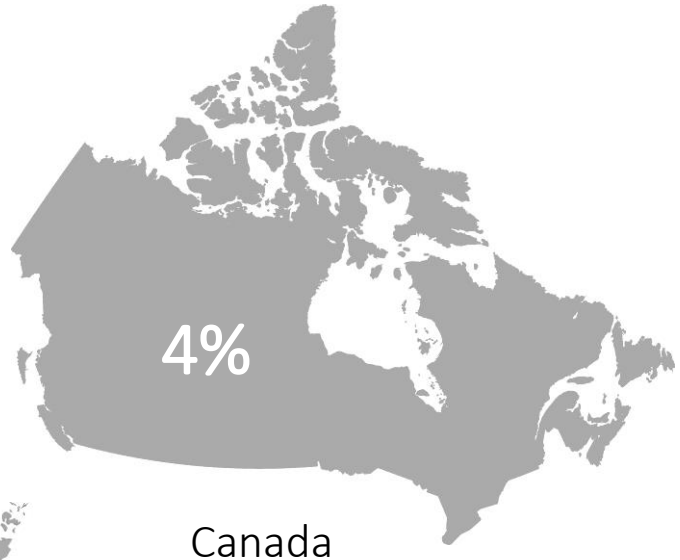
Visitor Journey: Travel Party Profile



Origin



US = 84%

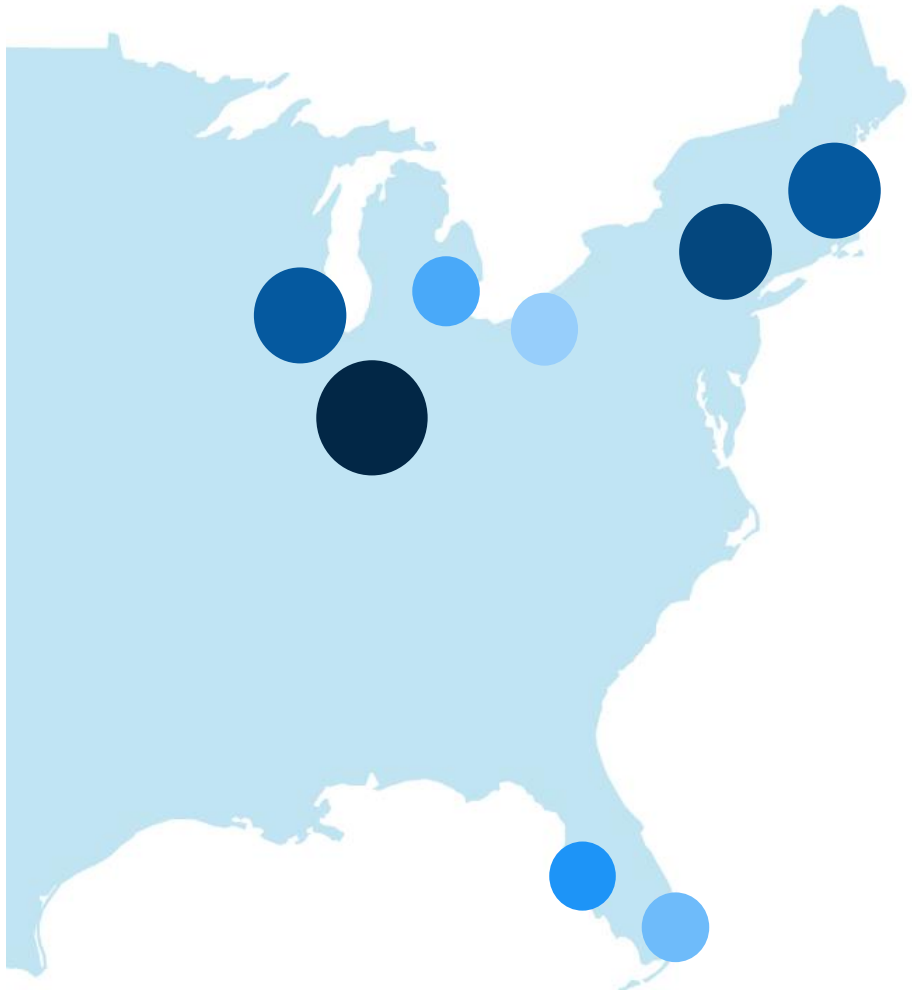


Canada

UK

Germany

Top Origin Markets



5%	Chicago
4%	New York
4%	Boston
4%	Minneapolis-St. Paul
3%	Tampa-St. Pete-Sarasota
3%	Detroit
3%	Miami-Ft. Lauderdale
3%	Cleveland-Akron

Travel Party Size and Composition

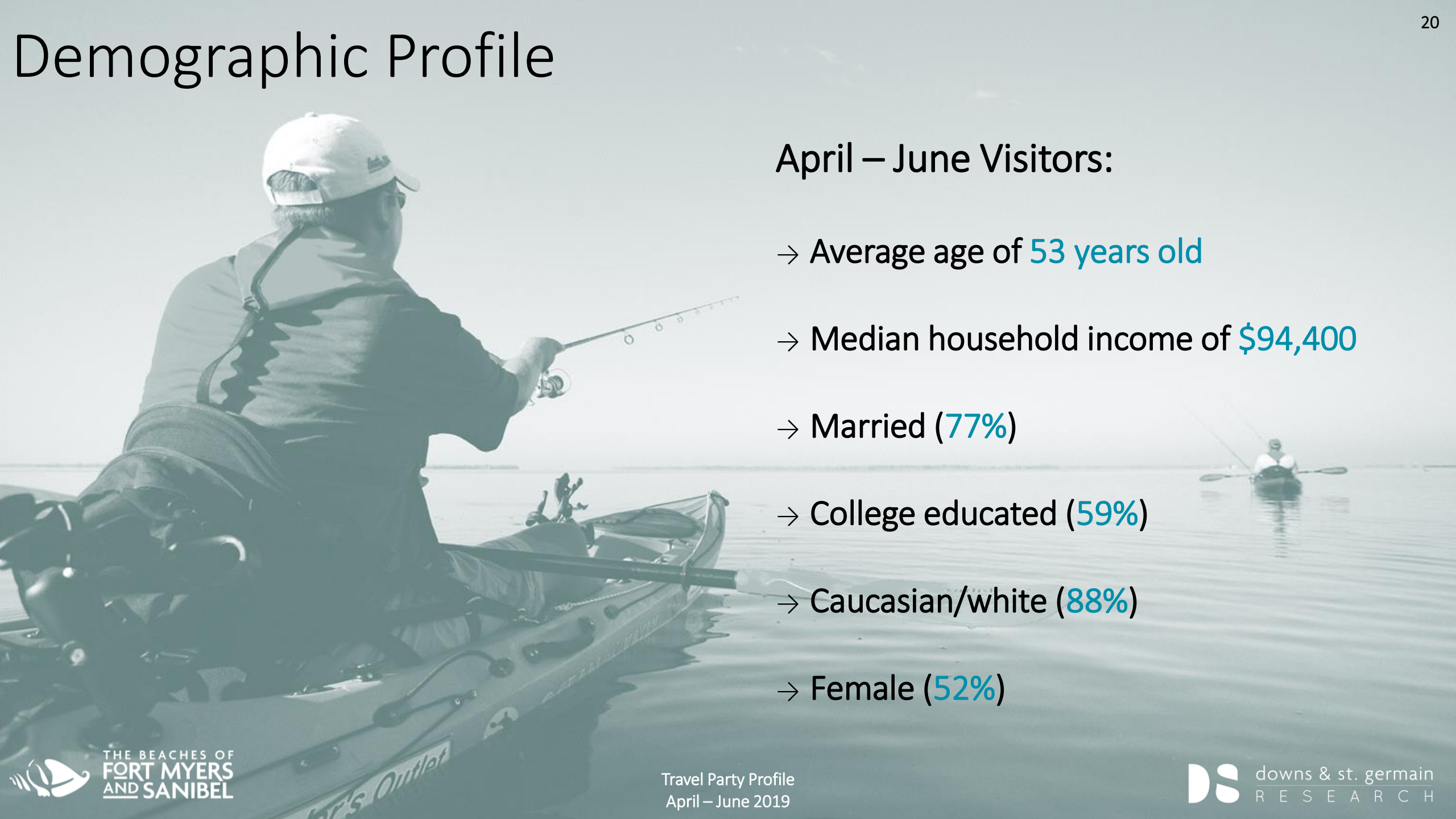
→Visitors traveled in a party composed of 3.2 people[1]

→29% traveled with children under the age of 18

→42% of visitors traveled as a couple, while 37% traveled as a family

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

Demographic Profile



April – June Visitors:

→ Average age of 53 years old

→ Median household income of $94,400

→ Married (77%)

→ College educated (59%)

→ Caucasian/white (88%)

→ Female (52%)

Visitor Journey: Trip Experience

Accommodations

32% Non-paid Accommodations

32% Condo/Vacation Rental

31% Hotel/Motel/Resort/B&B

3% Day trippers

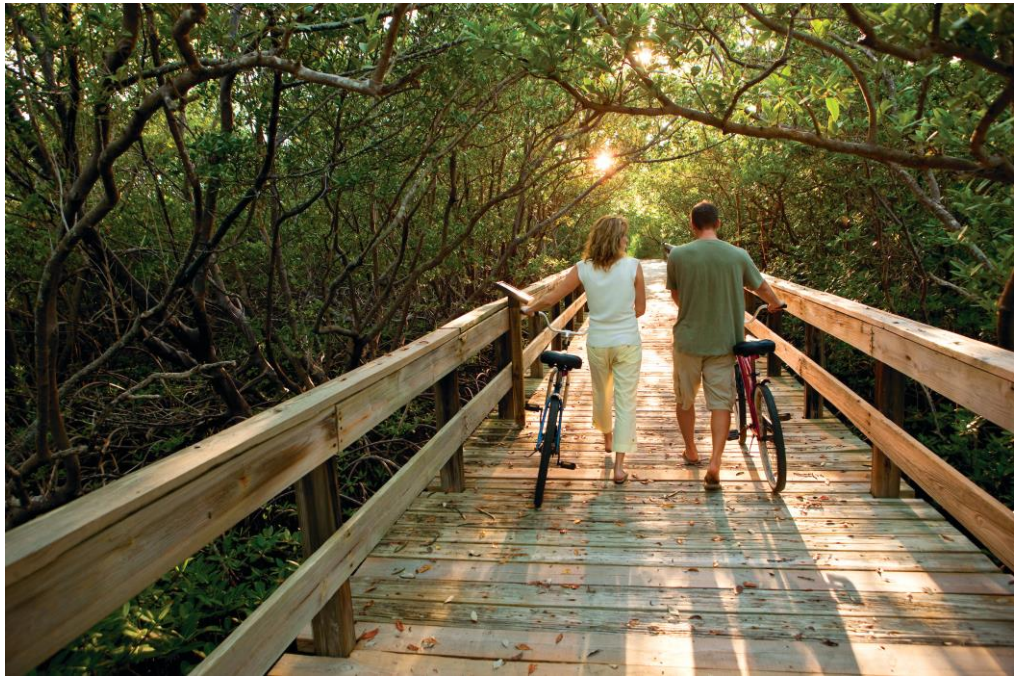
2% RV Park/Campground

Length of Stay & Number of Times in Destination

→Visitors[1] spent 7.4 nights in The Beaches of Fort Myers & Sanibel

→25% were first time visitors

→27% have visited more than 10 times



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

Visitor Activities

→Top visitor activities include[1]:

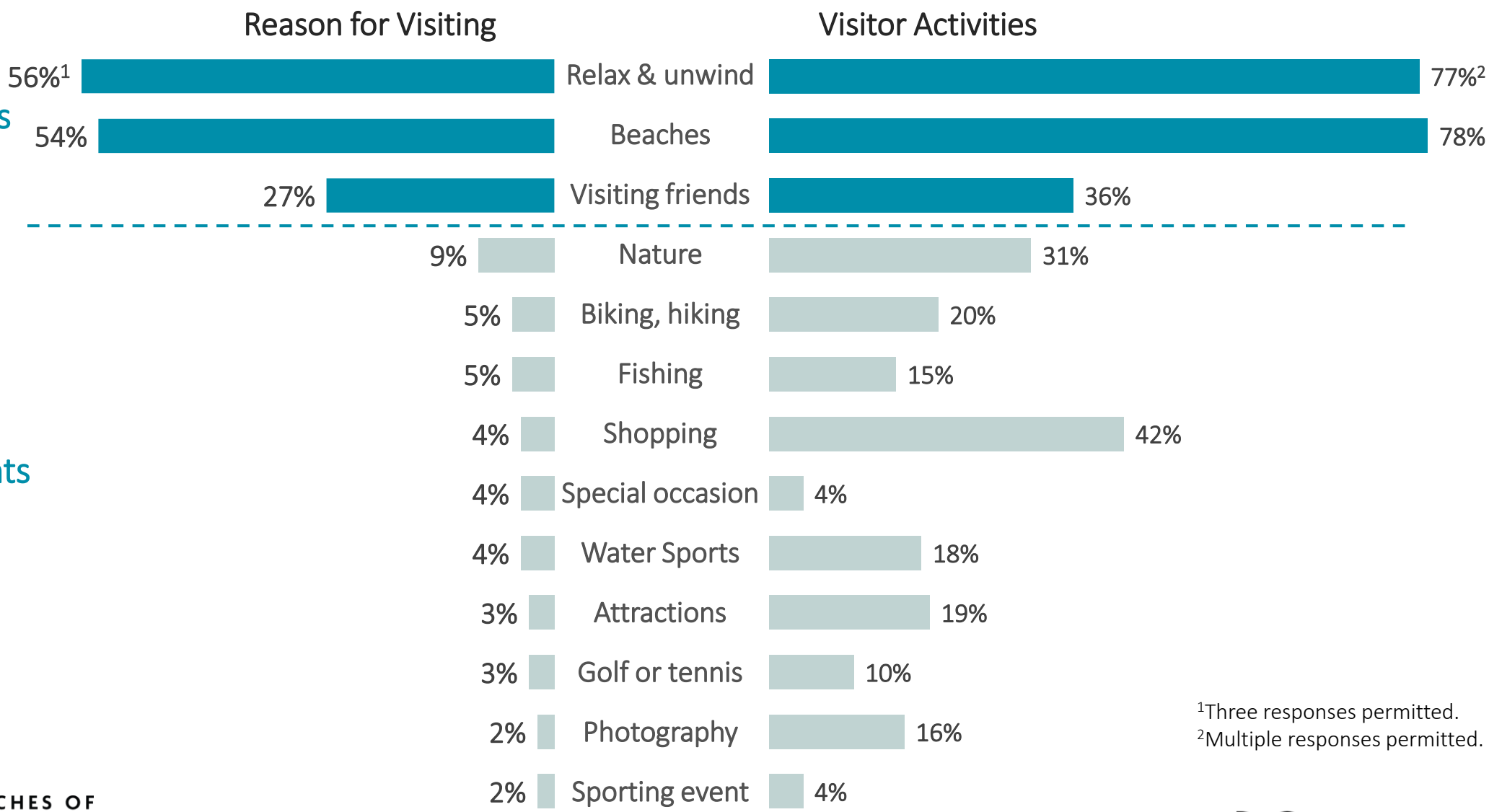
78% Beaches

77% Relax & unwind

64% Dining

[1]Multiple responses permitted.

Reason for Visiting vs. Visitor Activities



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

Top Attractions Visited[1]

75% Beaches

37% Fort Myers Beach Pier

32% Sanibel Outlets

24% Edison & Ford Winter Estates

20% Miromar Outlets

19% Sanibel Lighthouse

14% Ding Darling Wildlife Refuge

[1]Multiple responses permitted.

Top Communities Stayed

23% Sanibel Island

20% Fort Myers

20% Fort Myers Beach

16% Cape Coral

Visitor Journey: Post-Trip Evaluation

Satisfaction

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

→ **91%** of visitors are likely to return

→ **66%** of visitors are likely to return next year

→ **41%** of visitors said paid accommodations "Far Exceeded" or "Exceeded" their expectations

Satisfaction

→ **95%** of visitors were satisfied or very satisfied with their overall visit to The Beaches of Fort Myers & Sanibel

→ **92%** 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% Warm weather

98% Safe destination

97% Peaceful/relaxing

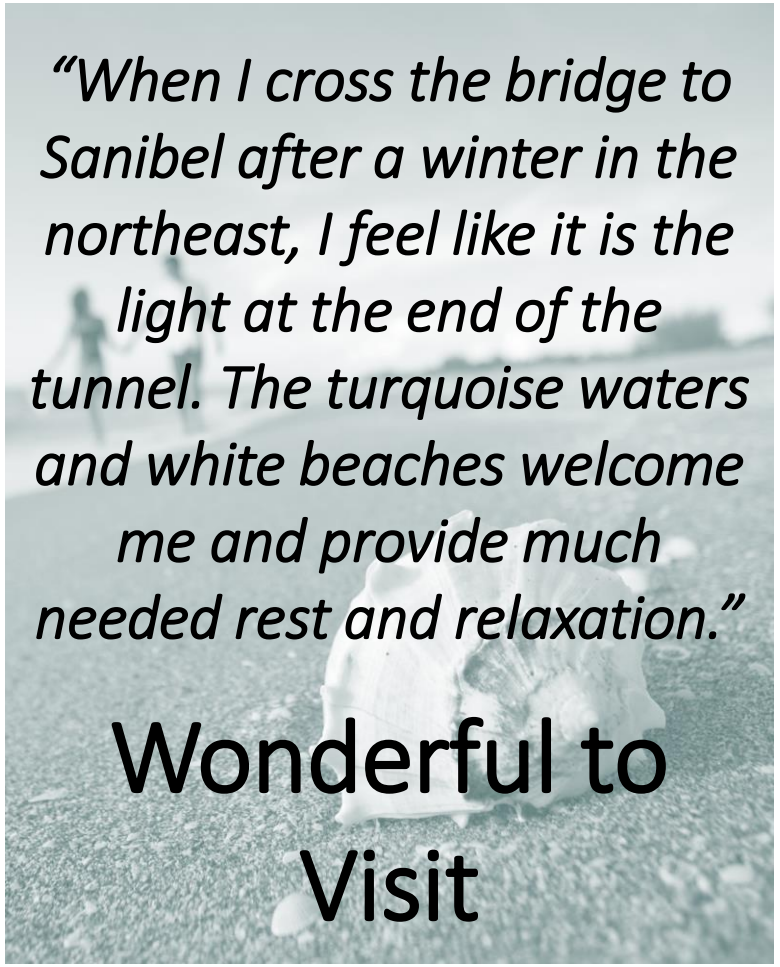
[1]Top 2 box scores. Attributes rated on a scale from 1 to 5 where 1 is Poor and 5 is Excellent.

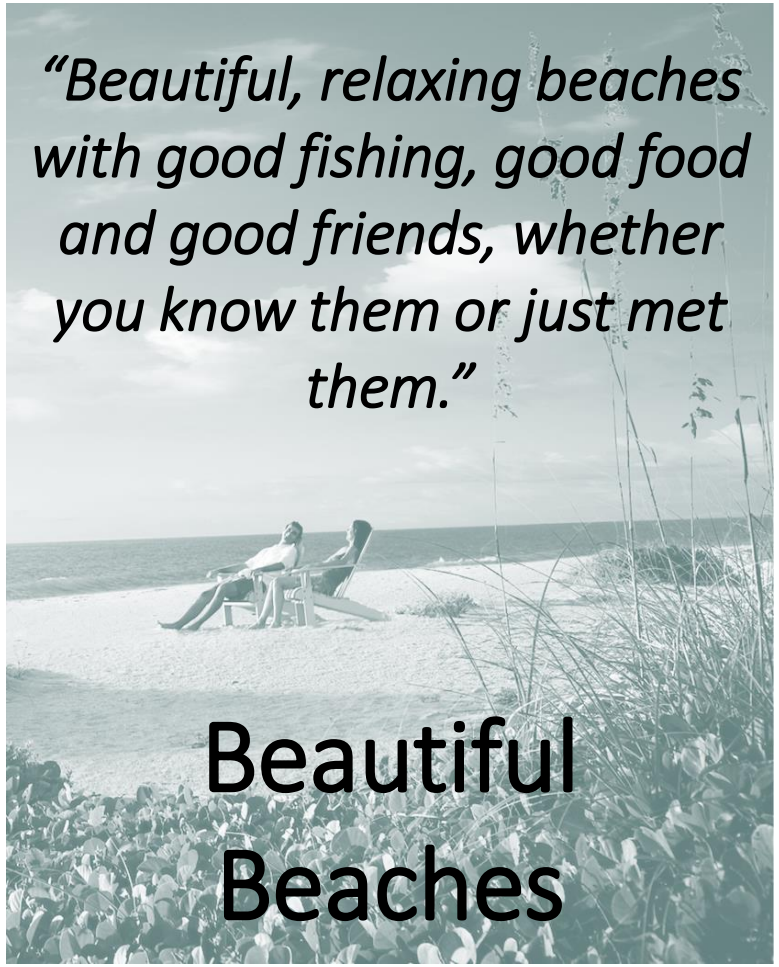
Visitor Concerns

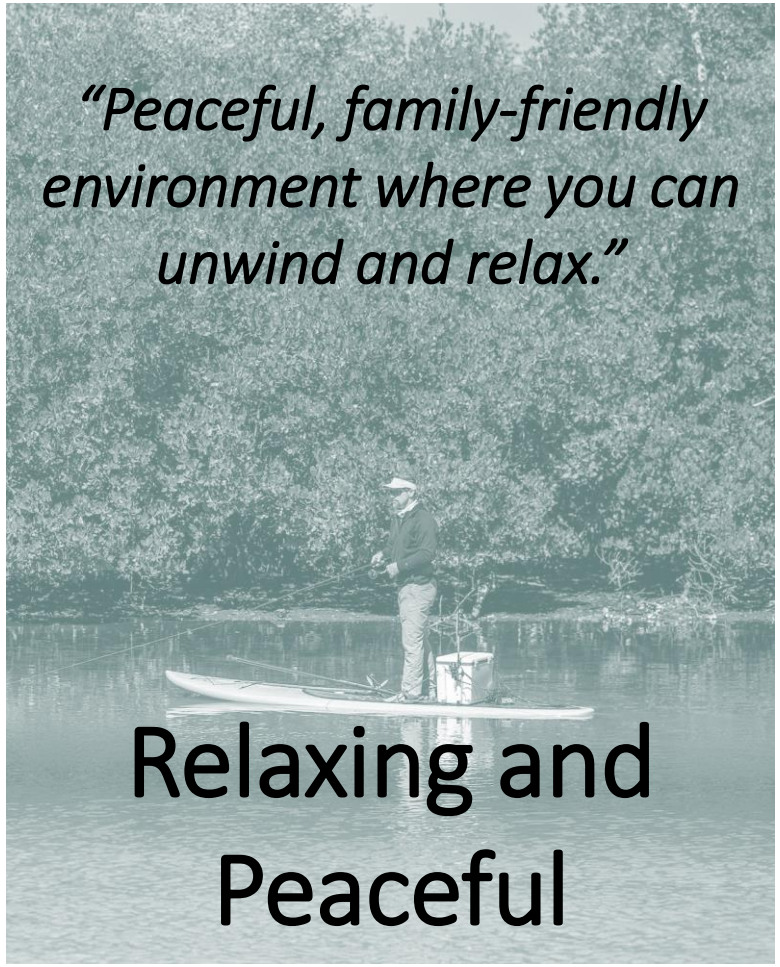
→30% of visitors were concerned about traffic in The Beaches of Fort Myers & Sanibel

→30% of visitors had no concerns about the destination

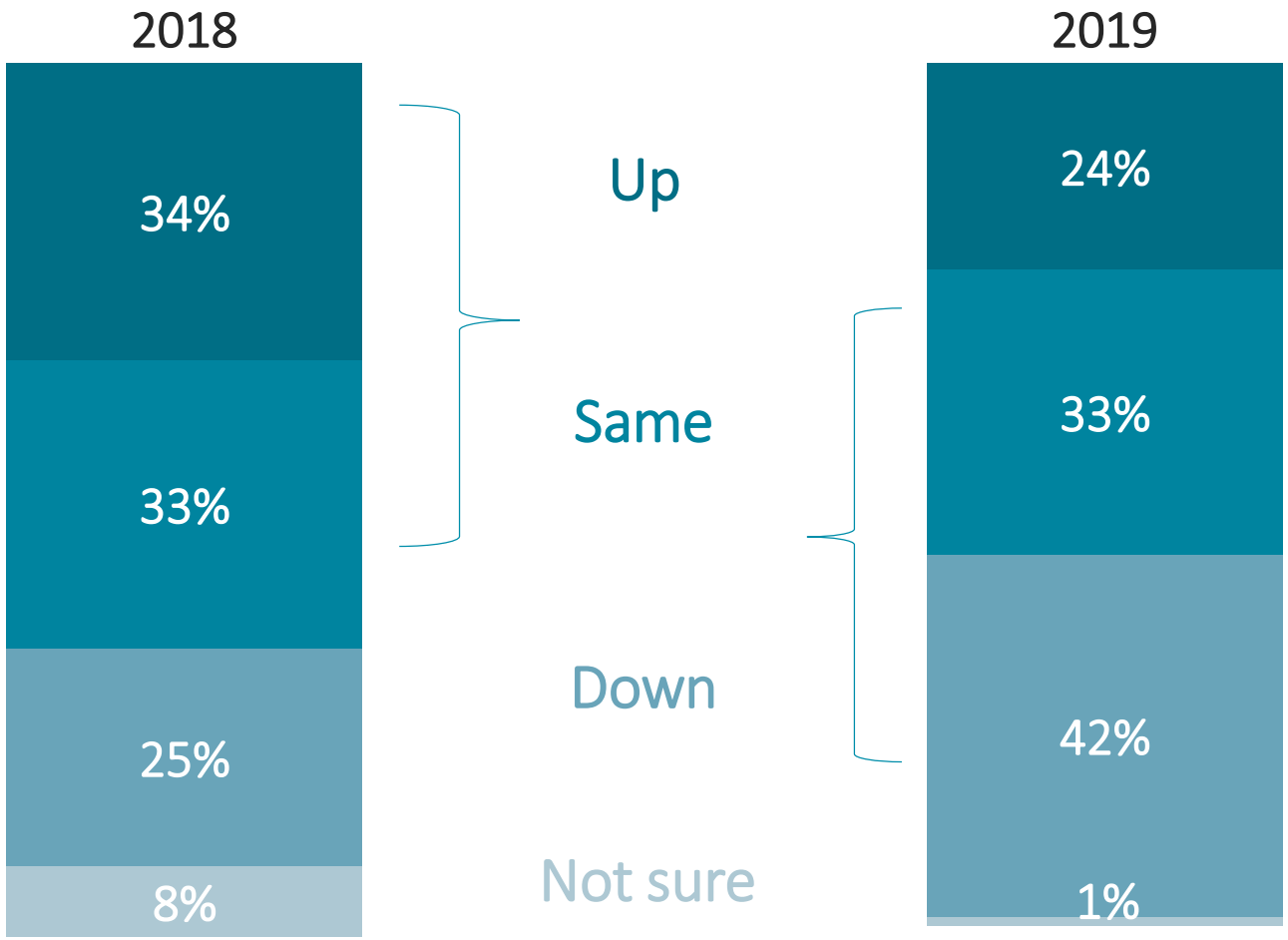
Area Descriptions



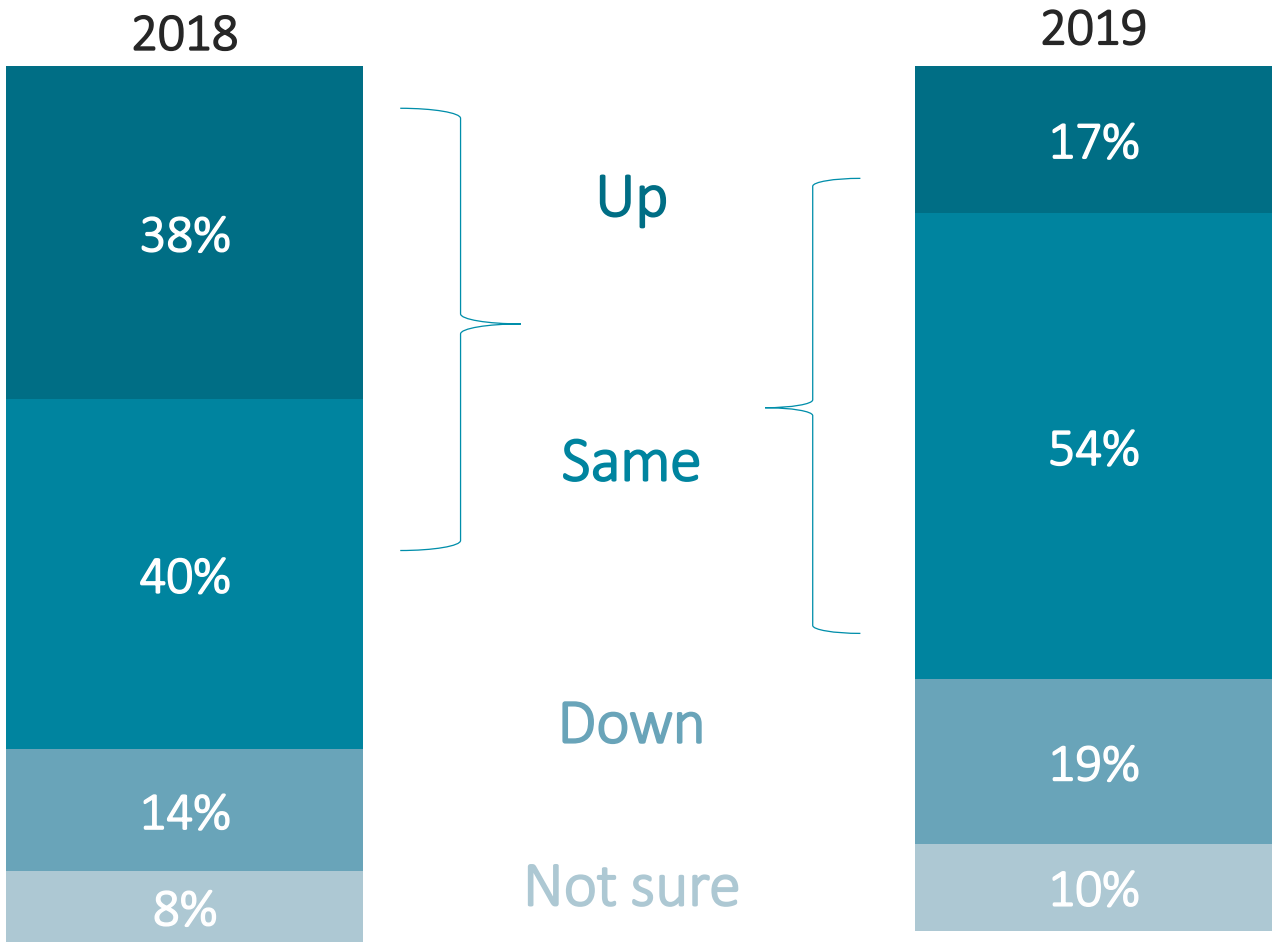




Occupancy Barometer: July – September Reservations



Occupancy Barometer: October – December Reservations

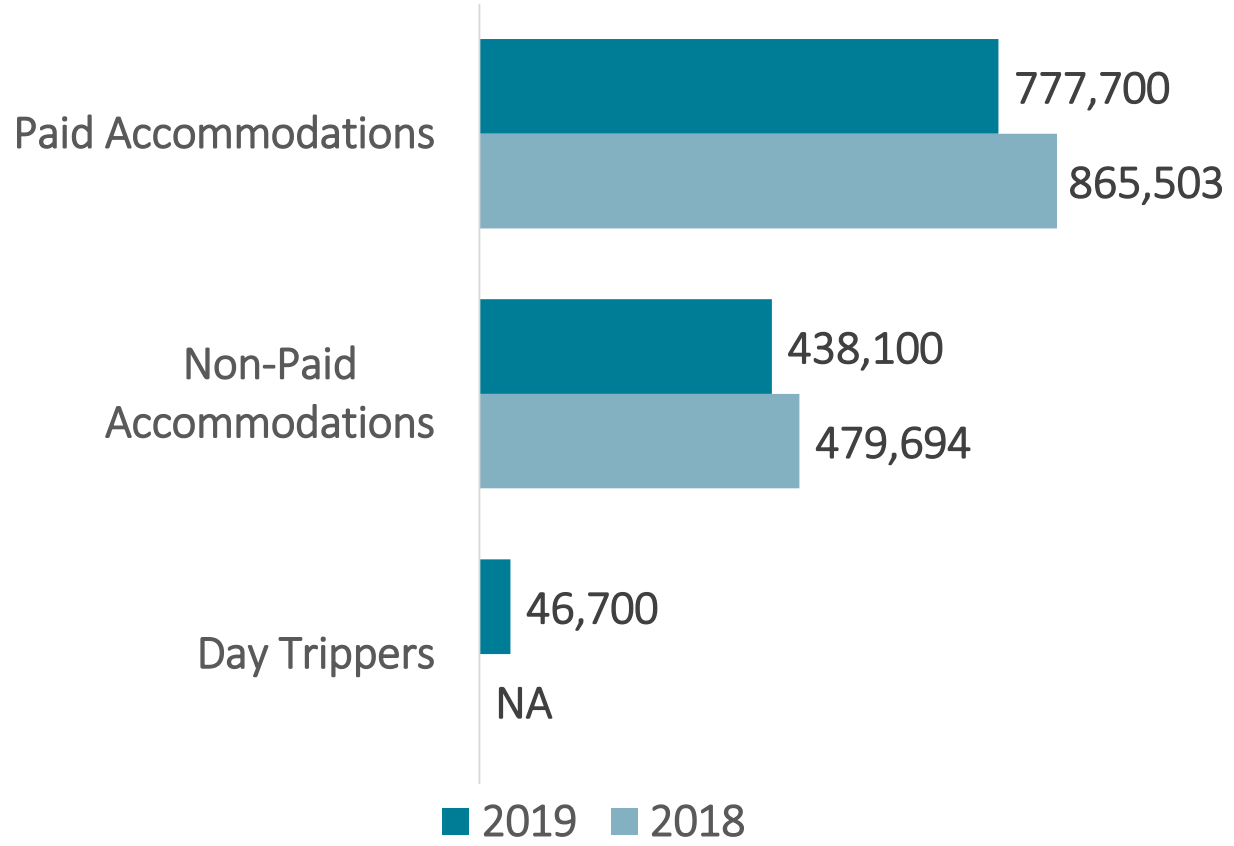


Detailed Findings

Visitor Journey: Economic Impact on Destination

Number of Visitors

There were **1,262,500**[1] visitors to The Beaches of Fort Myers & Sanibel in April – June 2019 (-6.1% from 2018).



[1]Sources: Visitor Tracking Study & Occupancy Survey

Visitor Type

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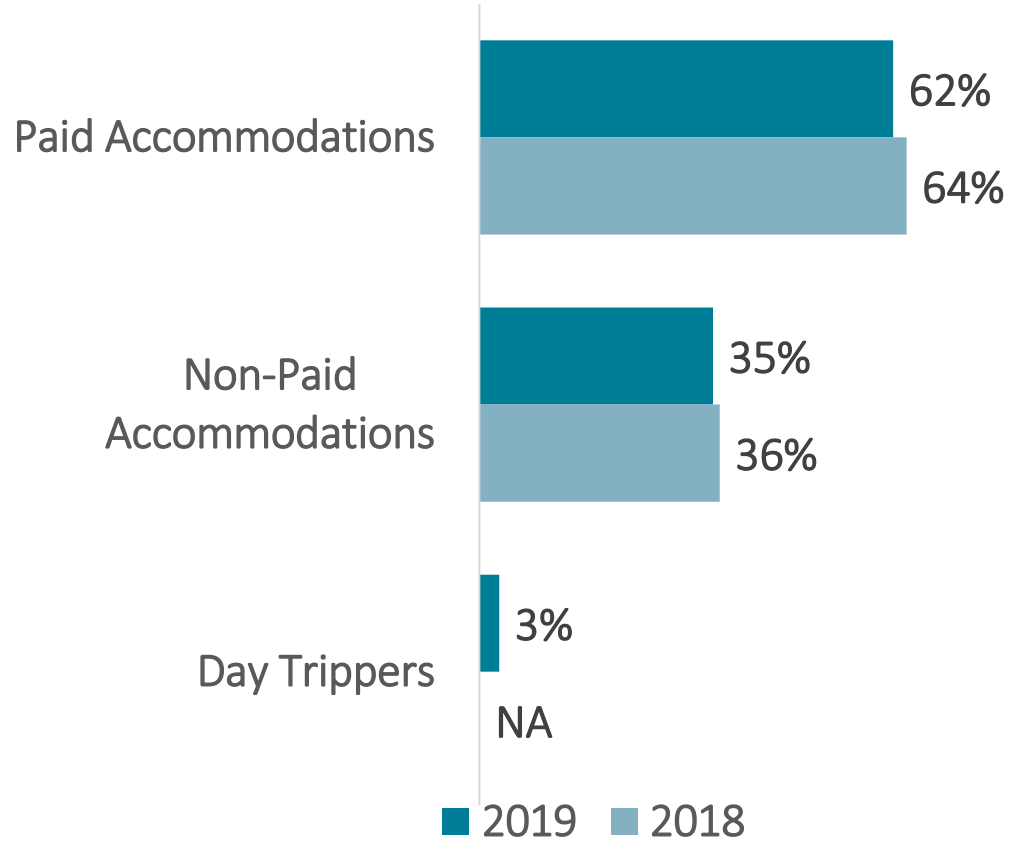
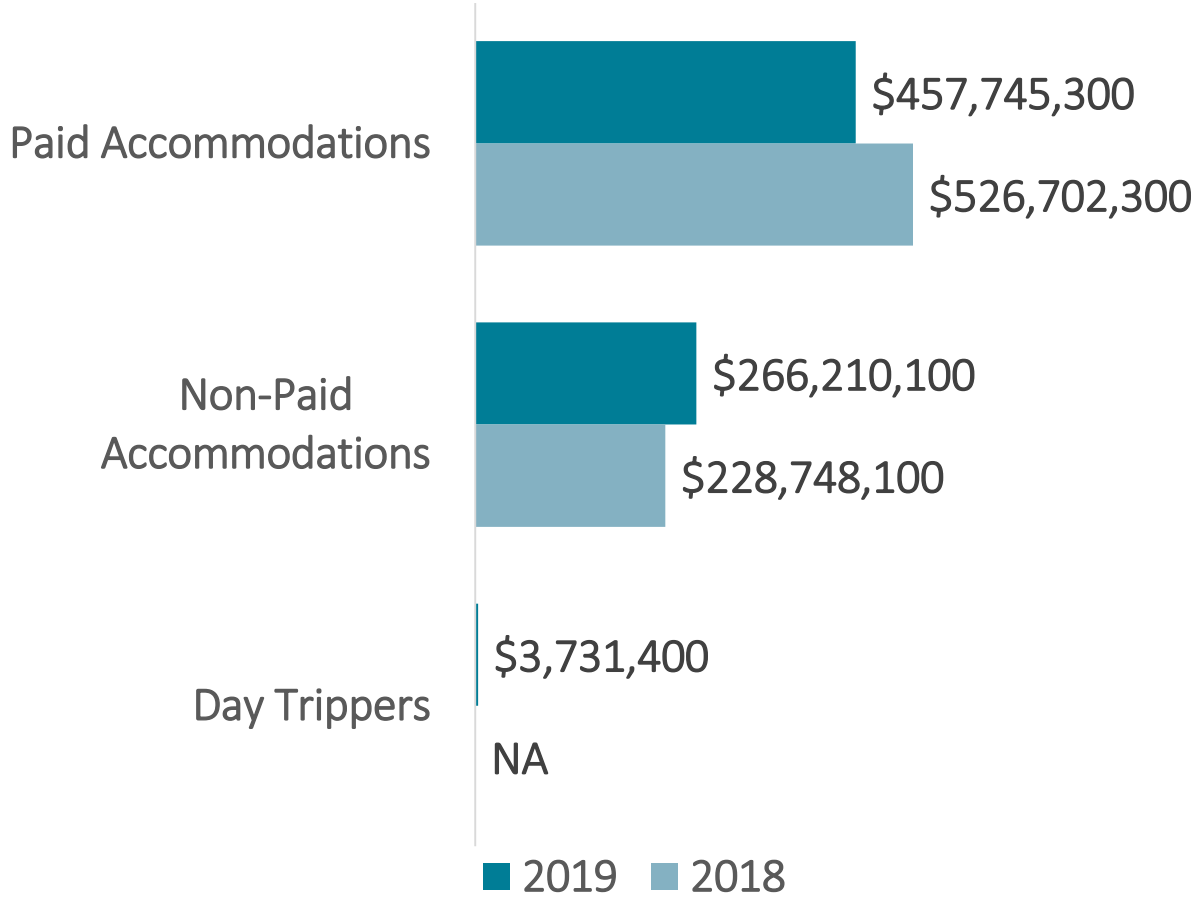


[1]Sources: Visitor Tracking Study & Occupancy Survey

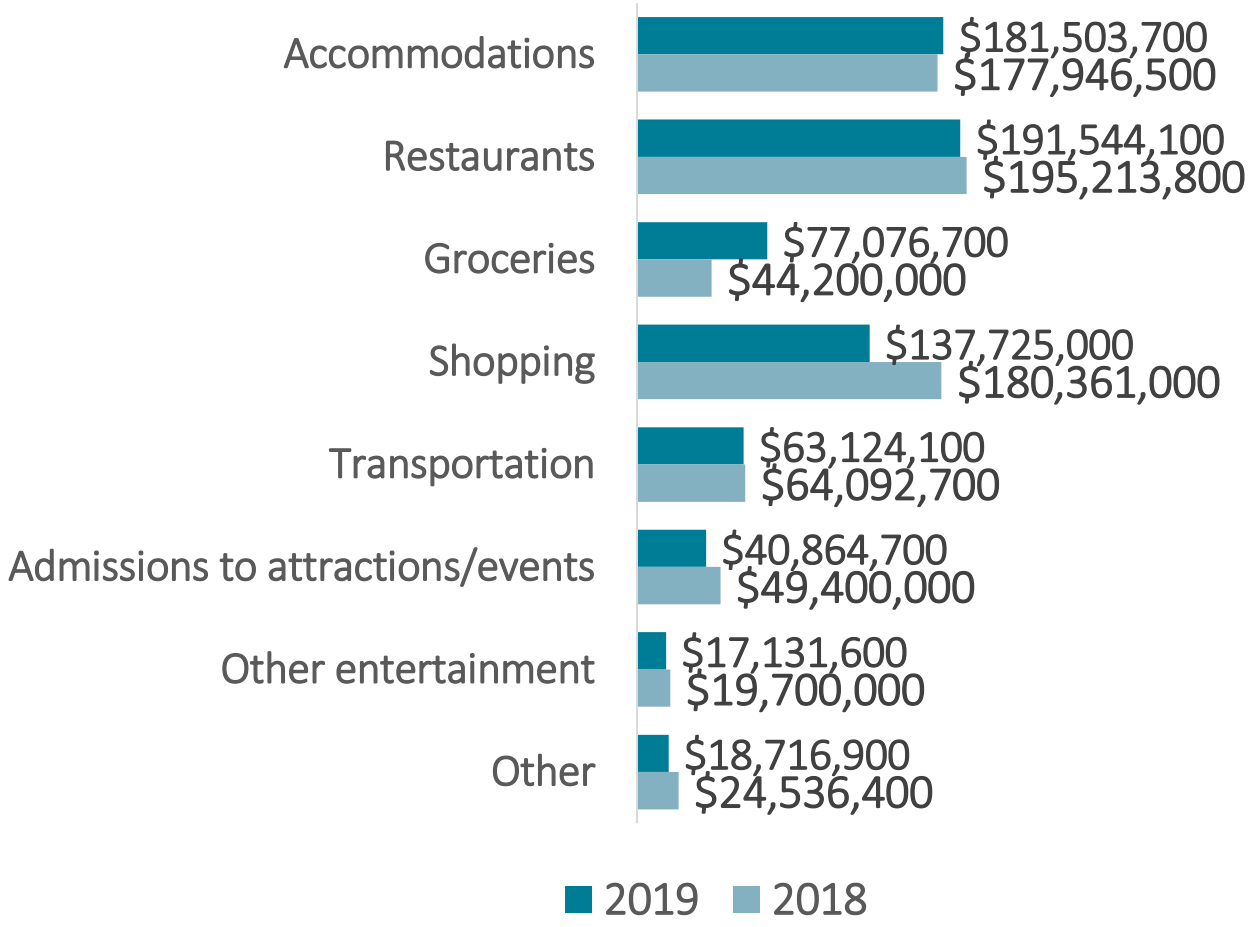
Visitor Expenditures by Visitor Type

April – June visitors spent **$727,686,800** in The Beaches of Fort Myers & Sanibel, resulting in a total economic impact of **$1,181,763,400**, down 3% from 2018.



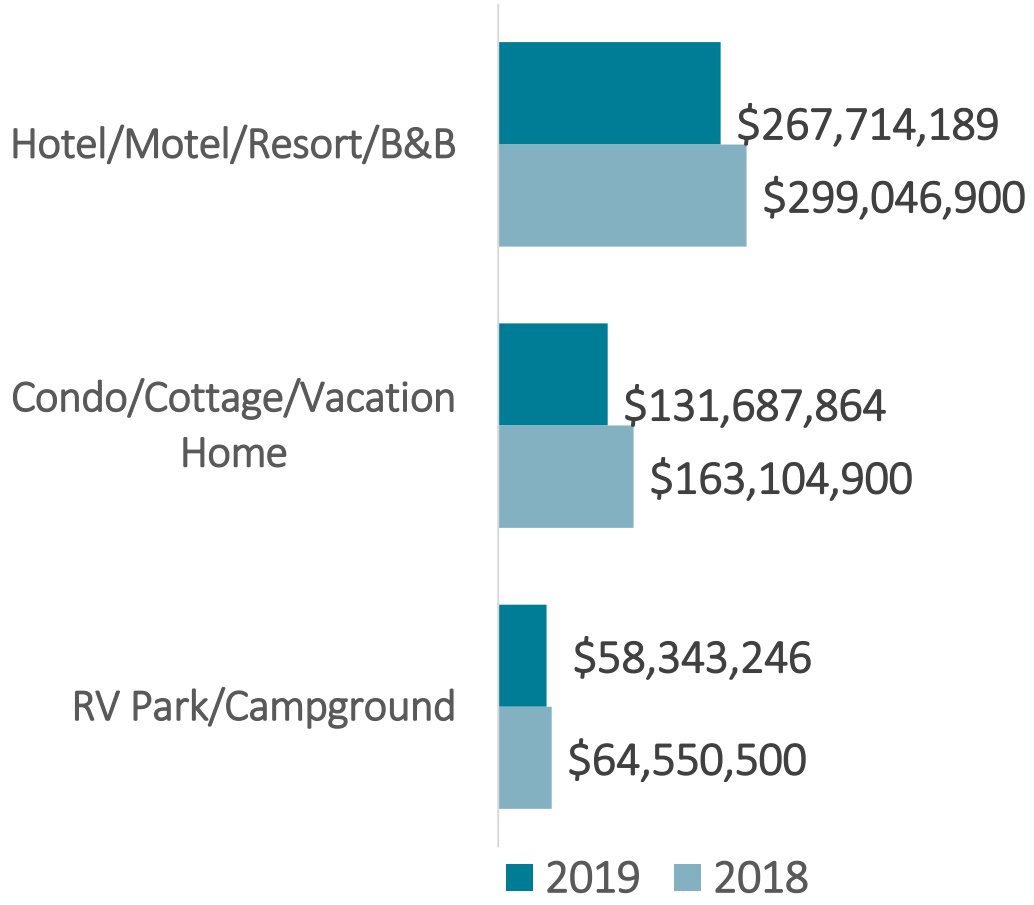
Visitor Expenditures by Spending Category

April – June visitors spent **$727,686,800** in The Beaches of Fort Myers & Sanibel, resulting in a total economic impact of **$1,181,763,400**.



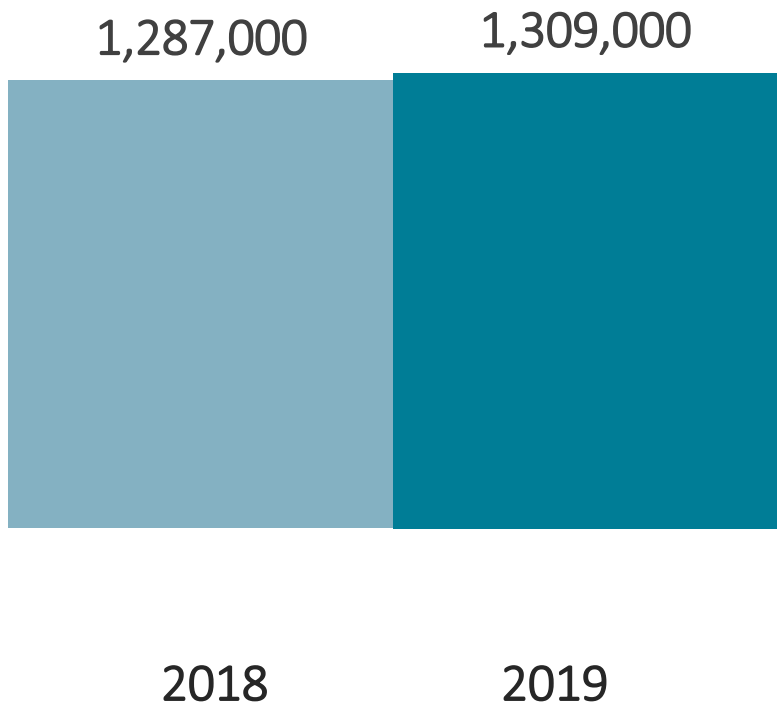
Visitor Expenditures by Lodging Type

April – June visitors staying in paid accommodations spent **$457,745,300** in The Beaches of Fort Myers & Sanibel (-13.1% from 2018).



Room Nights Generated

April – June visitors spent **1,309,000**[1] nights in The Beaches of Fort Myers & Sanibel hotels, resorts, condos, rental houses etc. (+1.7% from 2018).



→ Available units were up and length of stay was up, which more than compensated for a decrease in occupancy.

[1]Source: Occupancy Survey

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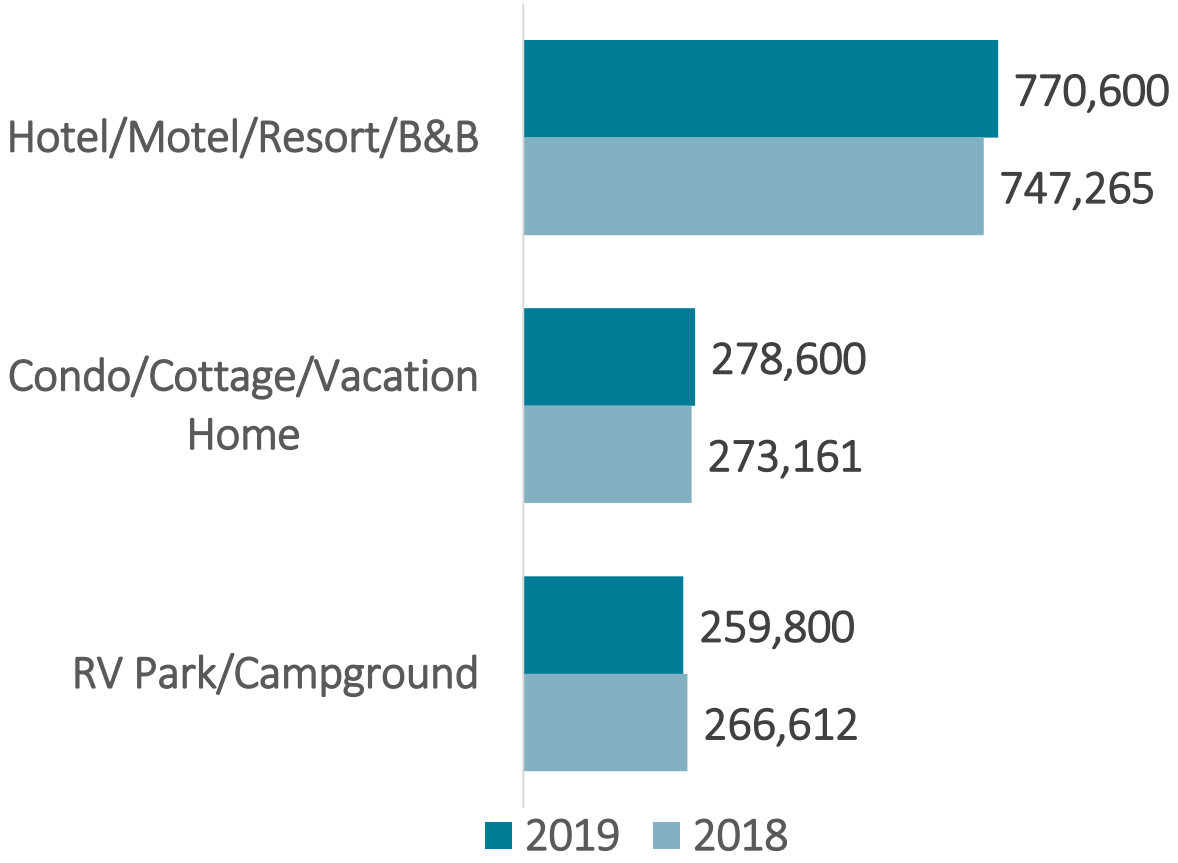
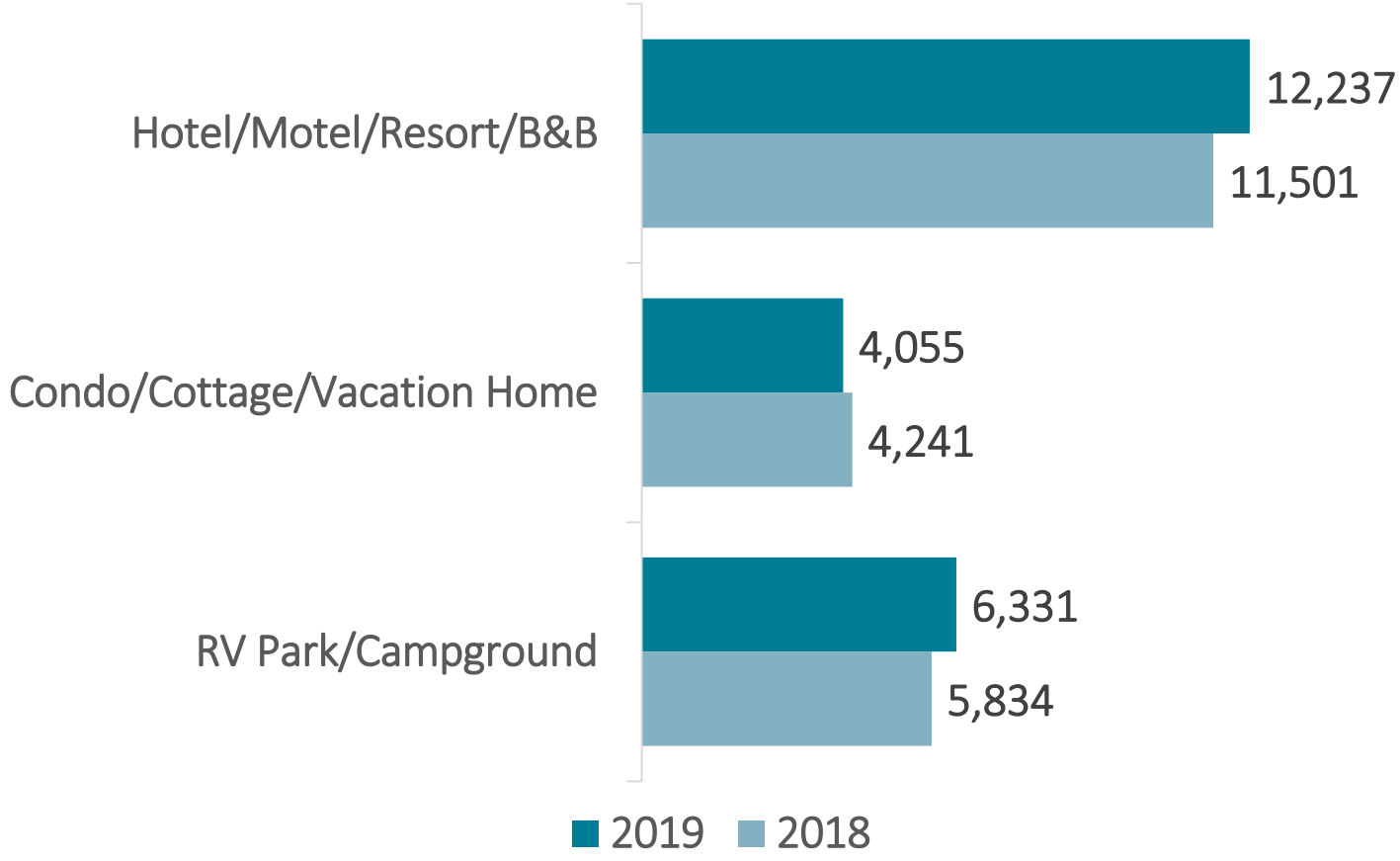


[1]Source: Occupancy Survey

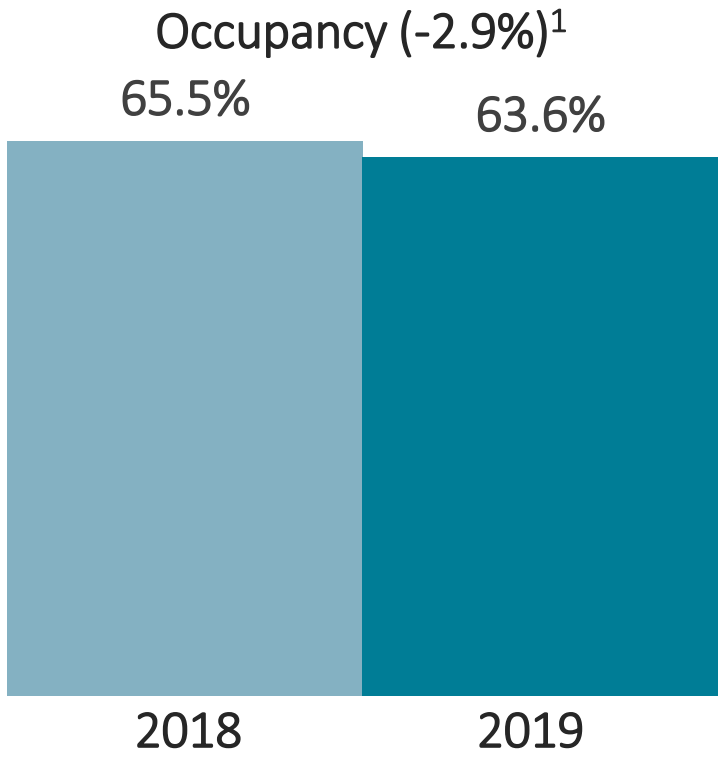
Available Units

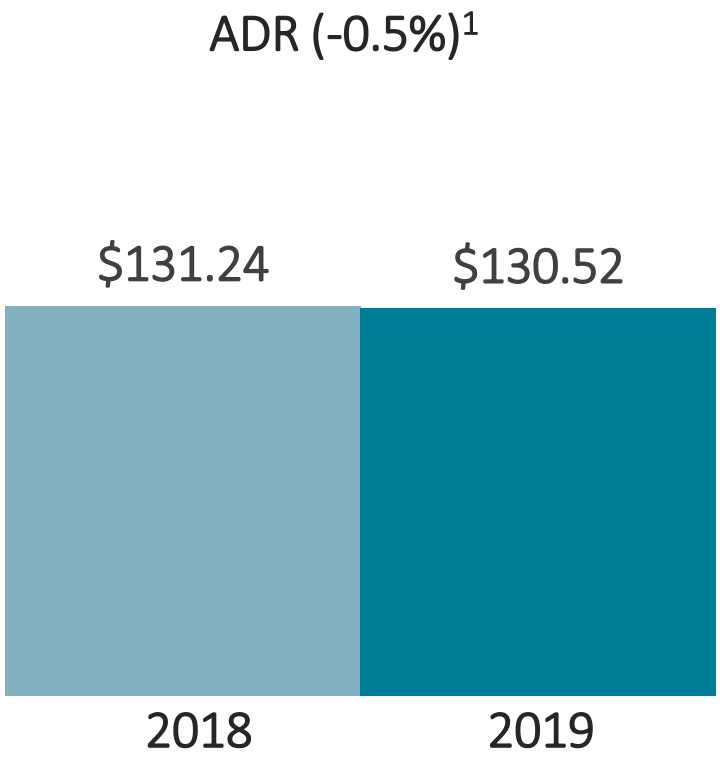
There were **22,623**[1] available units in April – June, 2019 vs. 21,577 in 2018 (+4.8%)

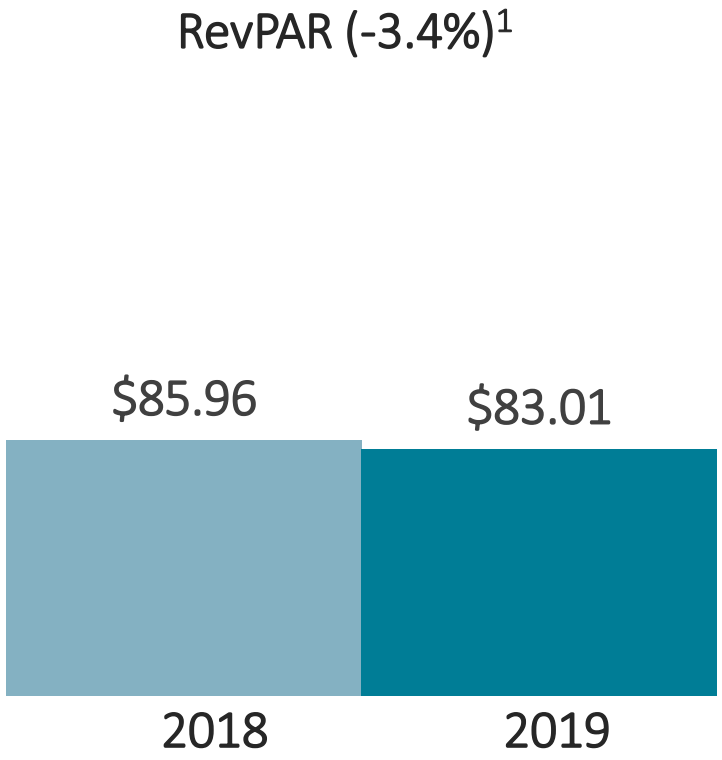


[1]Source: Occupancy Survey

Occupancy, ADR and RevPAR



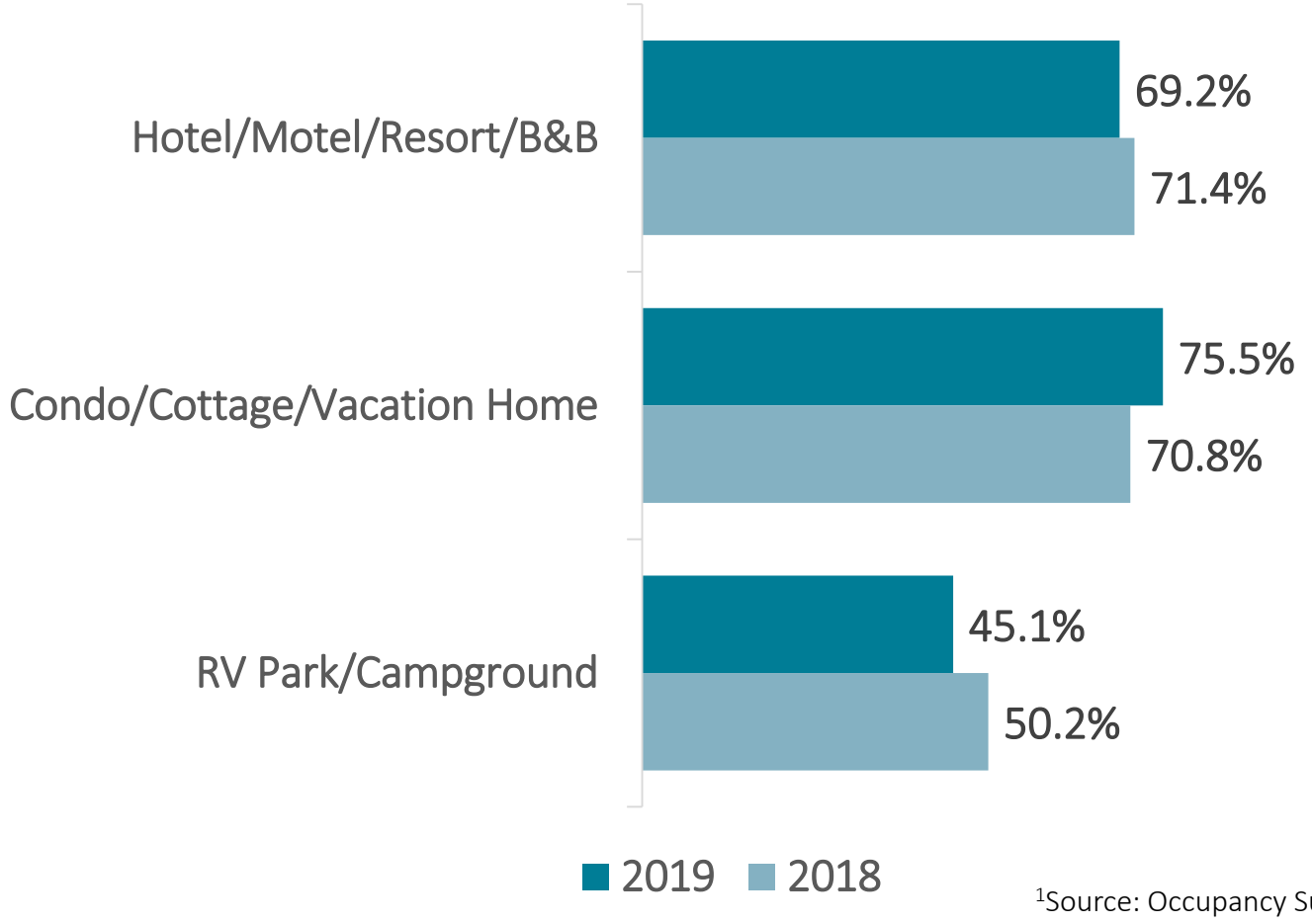




[1]Source: Occupancy Survey

Occupancy

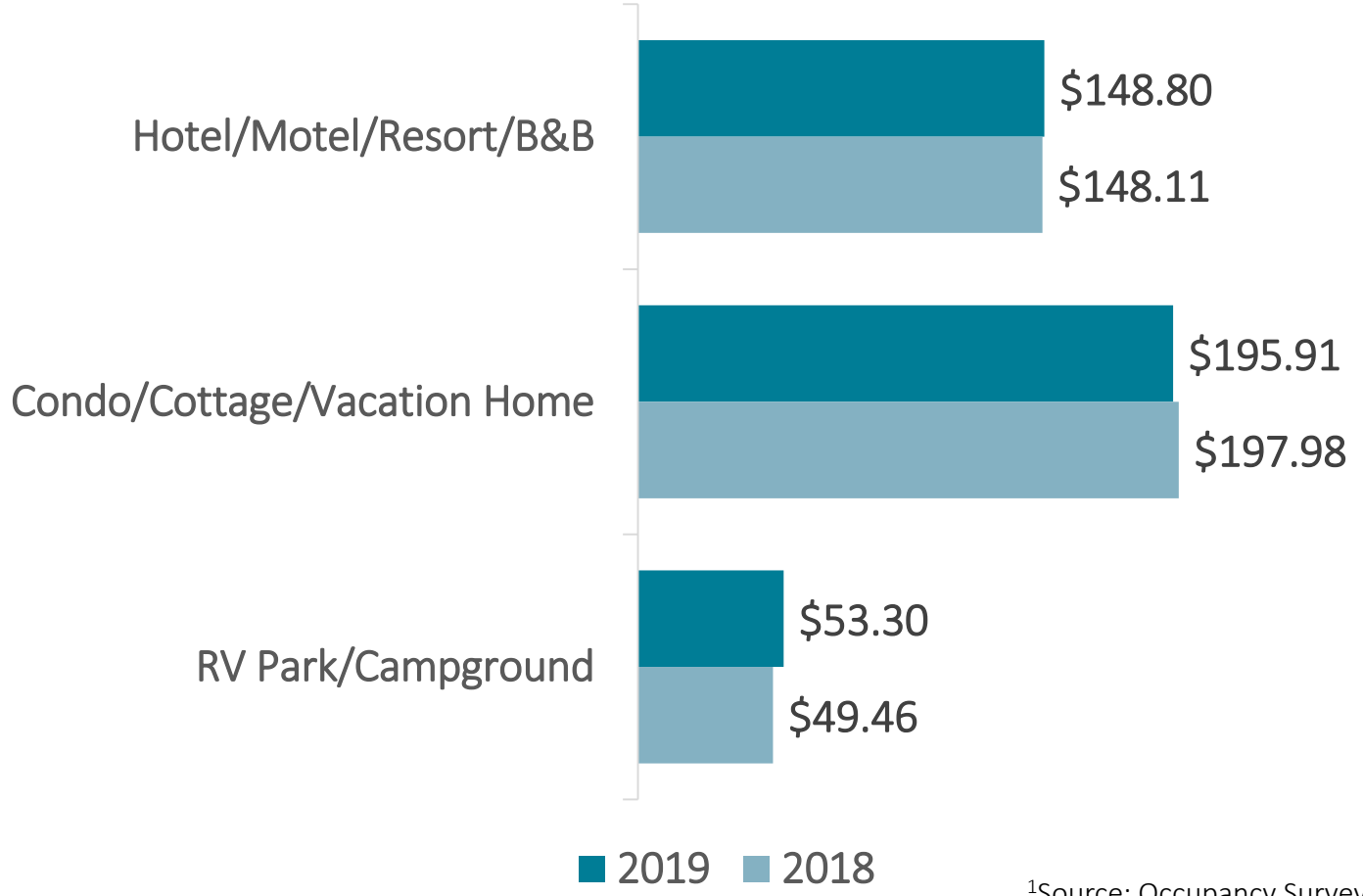
Average occupancy in April – June was **63.6%**[1] (65.5% in 2018).



[1]Source: Occupancy Survey

ADR

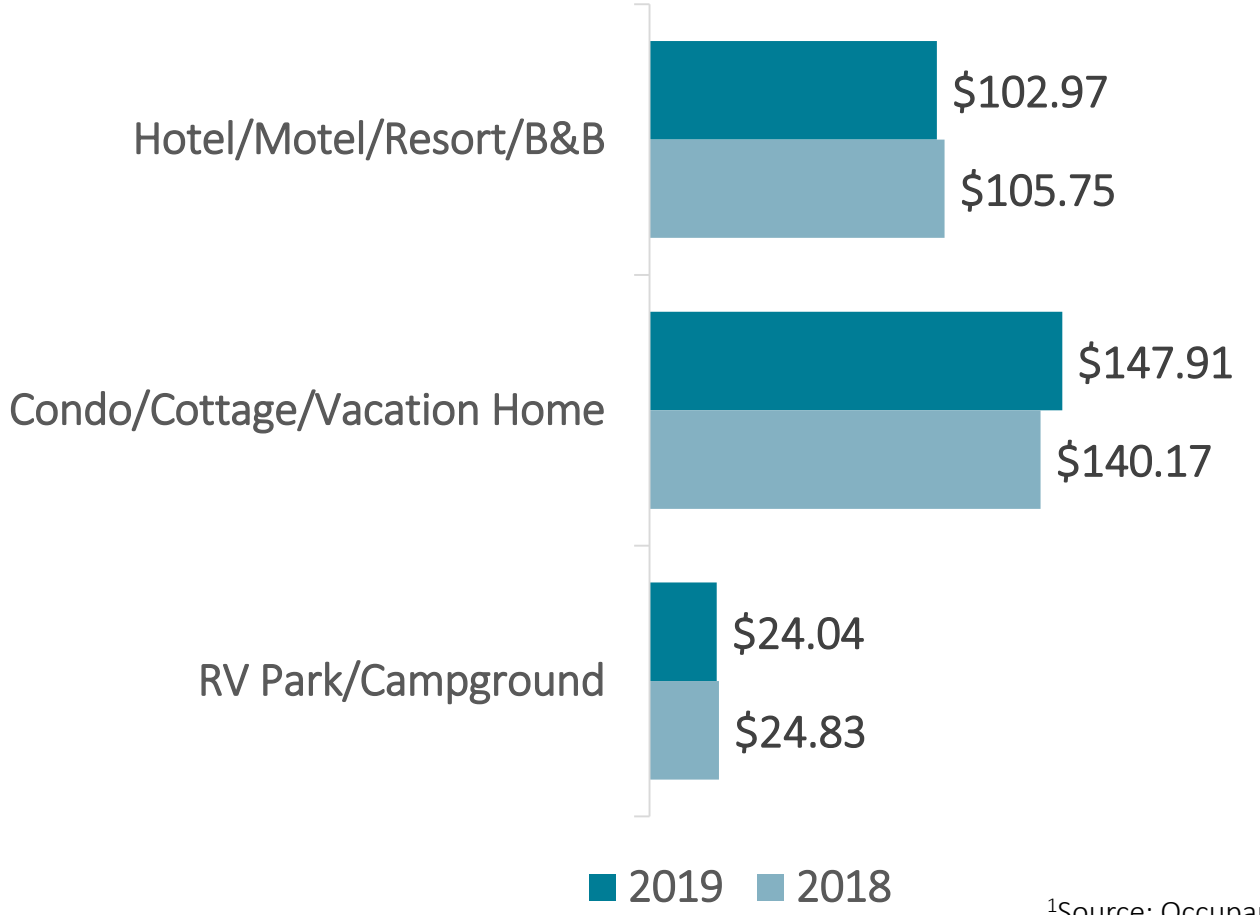
ADR in April – June was **$130.52**[1] ($131.24 in 2018).



[1]Source: Occupancy Survey

RevPAR

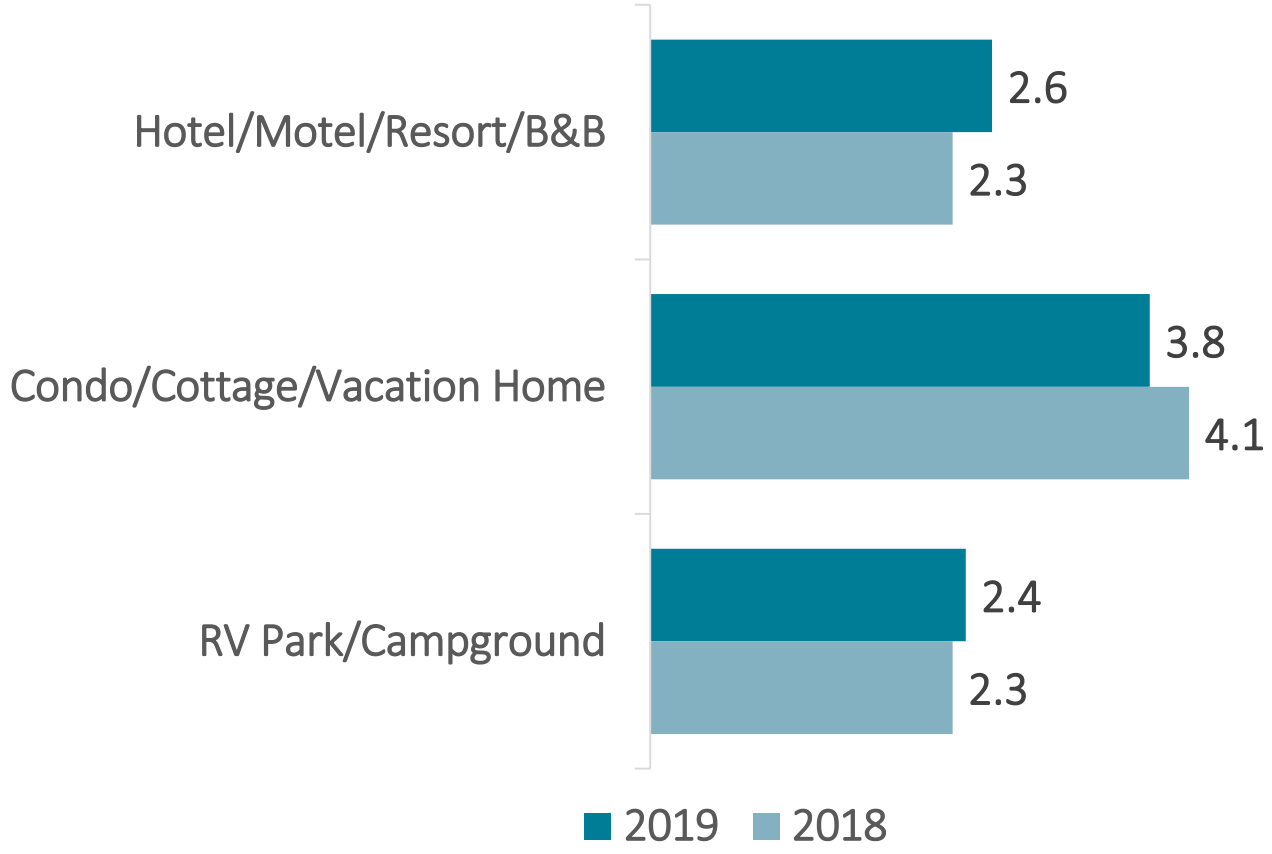
Average RevPAR in April – June was **$83.01**[1] ($85.96 in 2018).



[1]Source: Occupancy Survey

Travel Party Size

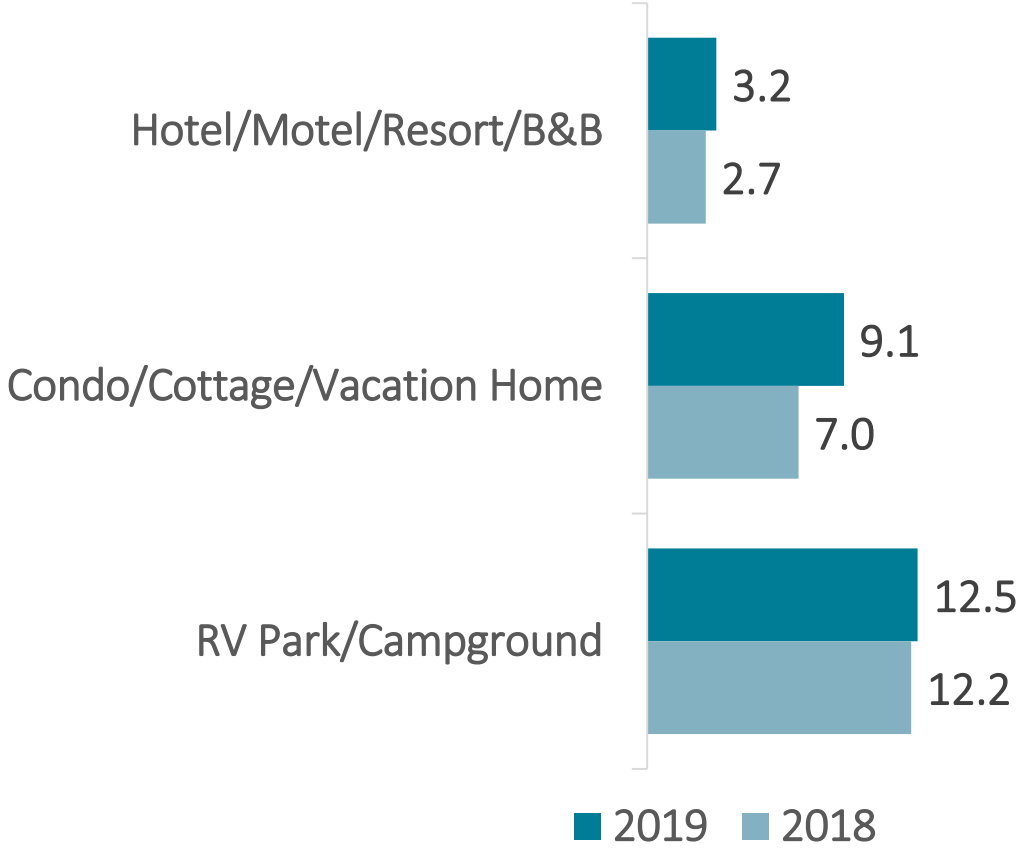
For visitors in paid accommodations, average travel party size in April – June was **2.8 people**[1] (2.8 people in 2018).



[1]Source: Occupancy Survey

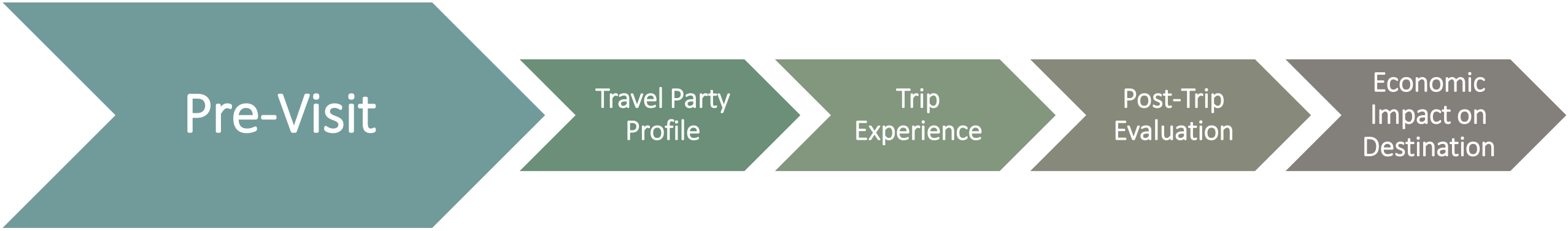
Length of Stay

For visitors in paid accommodations, average length of stay in April – June was **4.7 nights**[1] (4.0 nights in 2018).



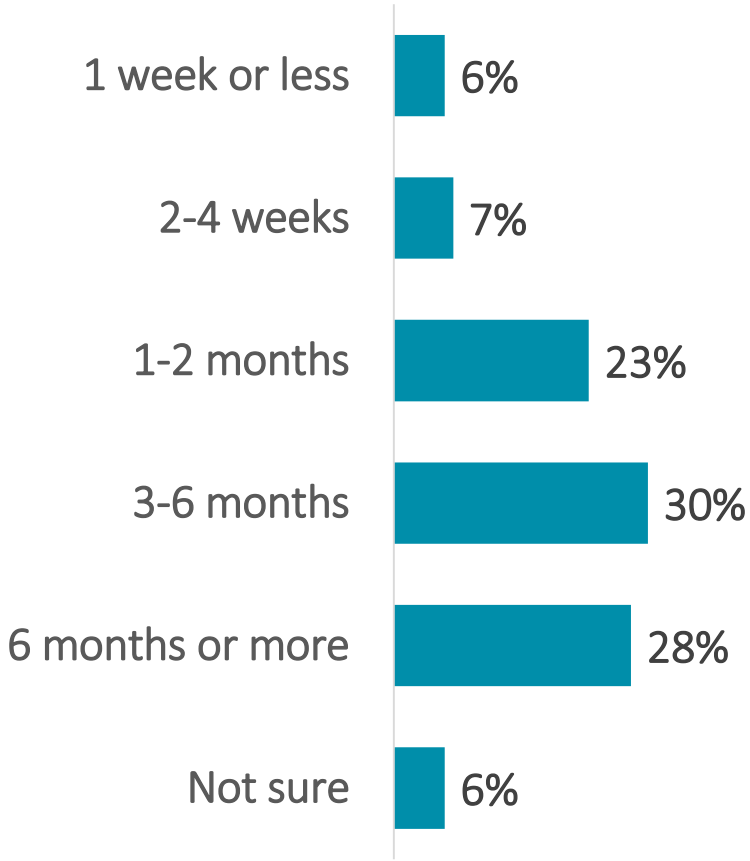
[1]Source: Occupancy Survey

Visitor Journey: Pre-Visit



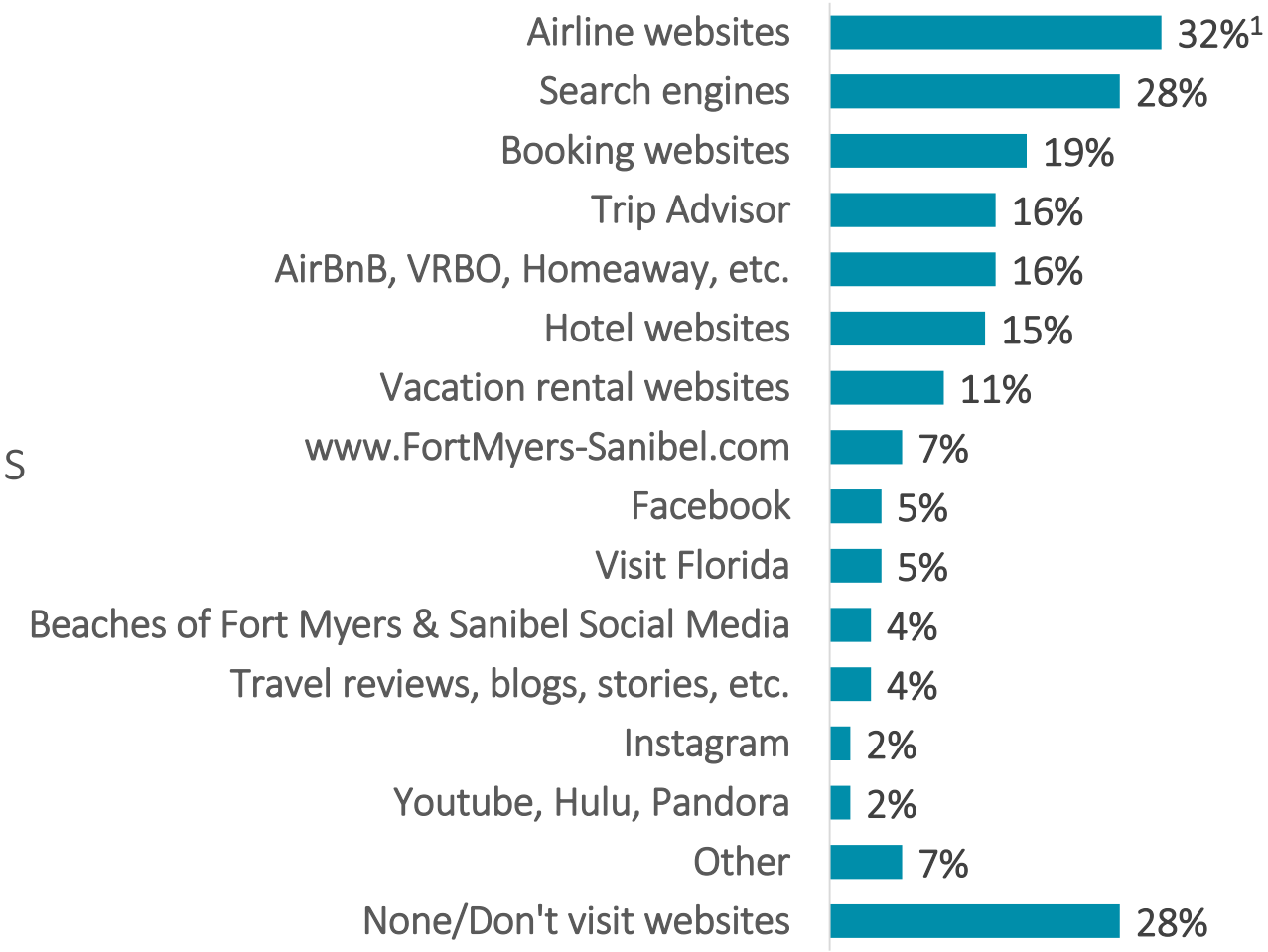
Trip Planning Cycle

Nearly **6 in 10** visitors planned their trip at least 3 months in advance, while only **13%** planned their trip less than a month in advance.



Trip Planning: Websites Used

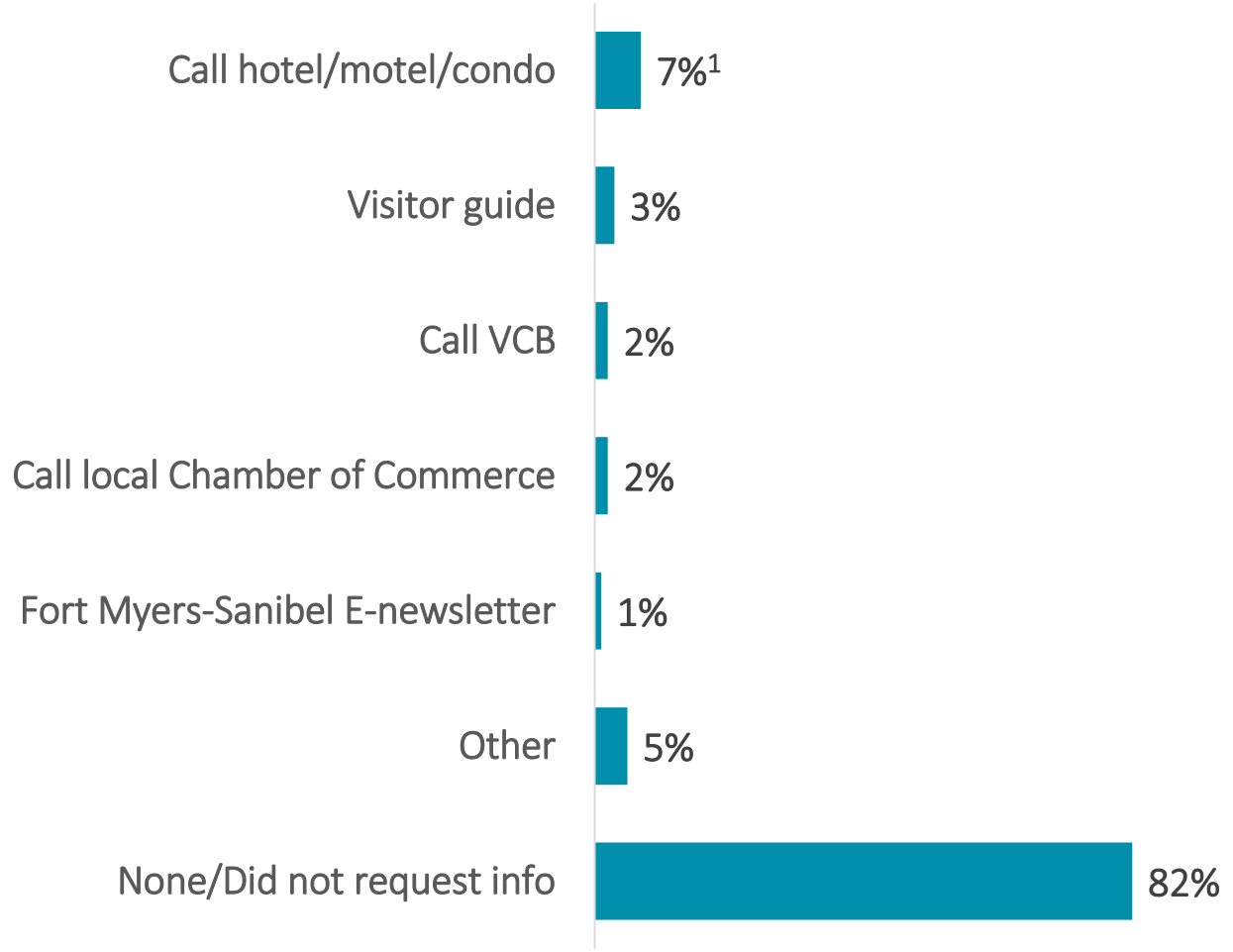
7 in 10 visitors used websites to plan their trip to The Beaches of Fort Myers & Sanibel.



[1]Multiple responses permitted.

Trip Planning: Information Requests

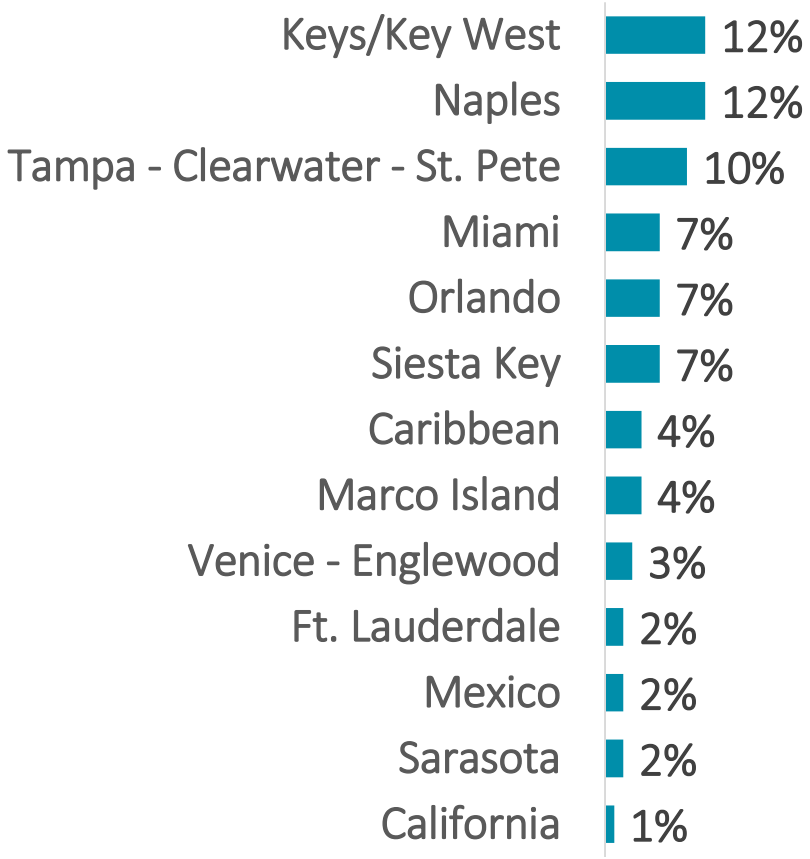
2 in 10 visitors made information requests to plan their trip to The Beaches of Fort Myers & Sanibel.



[1]Multiple responses permitted.

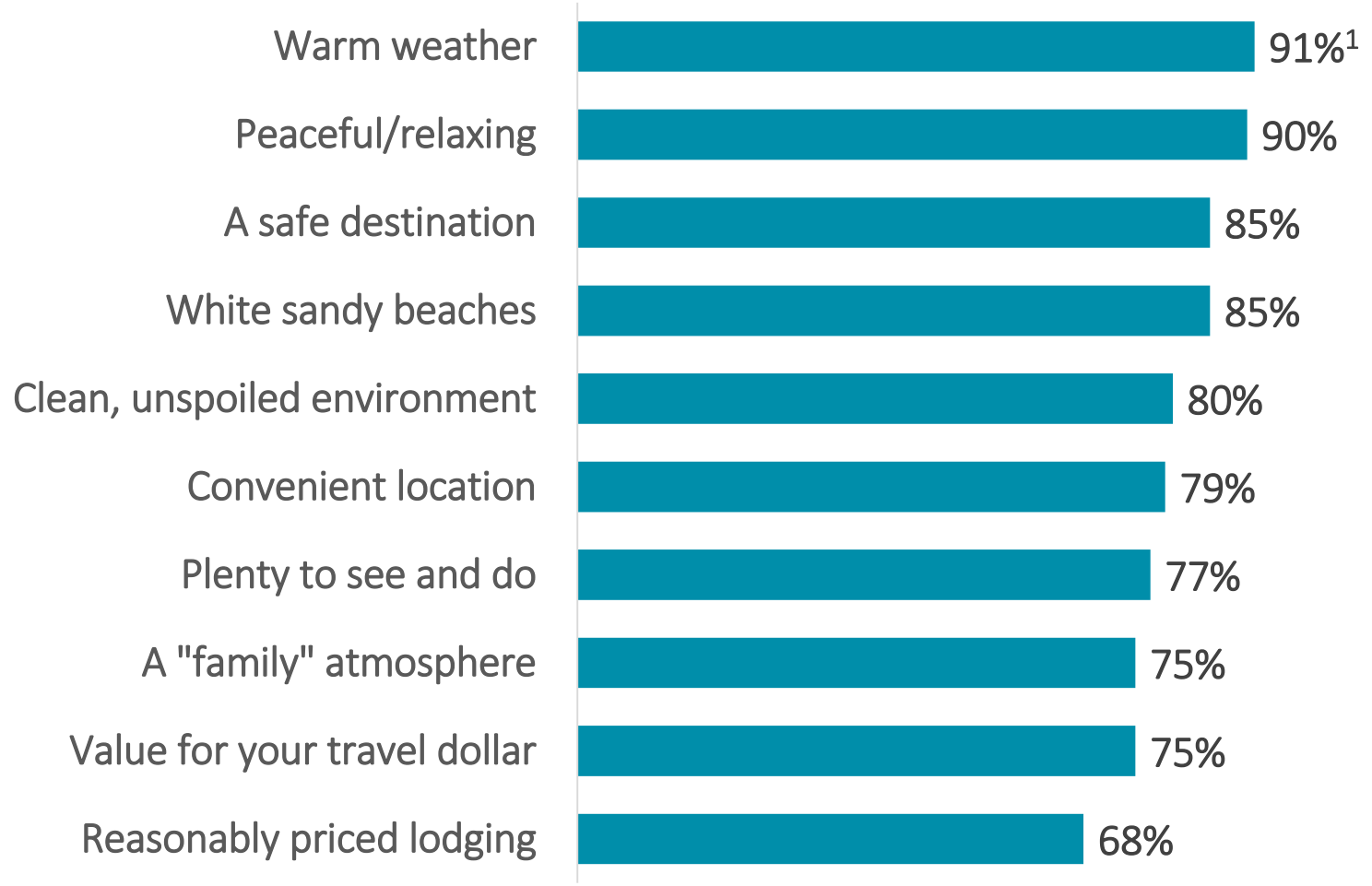
Trip Planning: Other destinations considered

14% of visitors considered choosing other destinations when planning their trips.



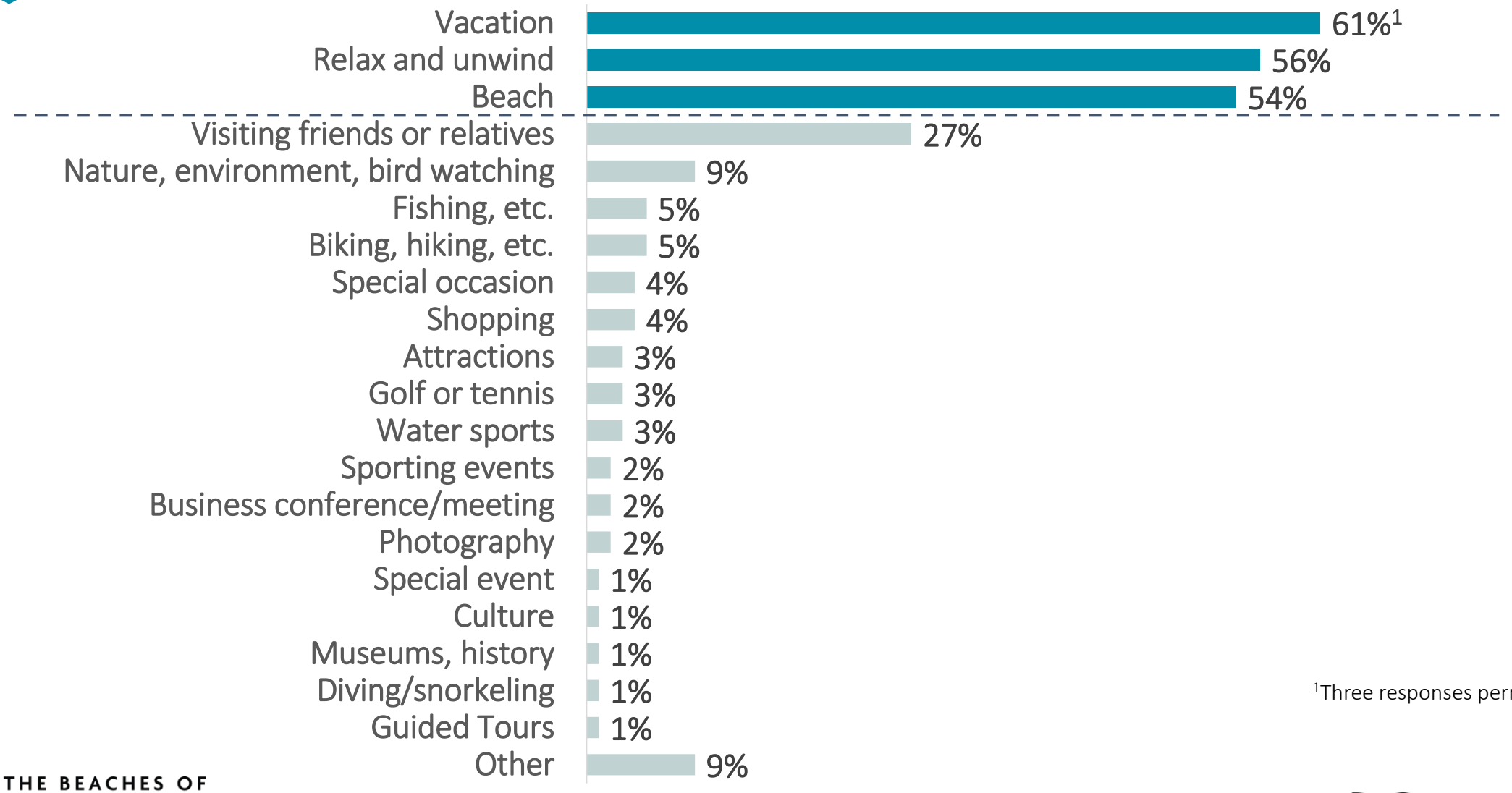
Trip Influencers

9 in 10 visitors were heavily influenced by warm weather when thinking about visiting The Beaches of Fort Myers & Sanibel.



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

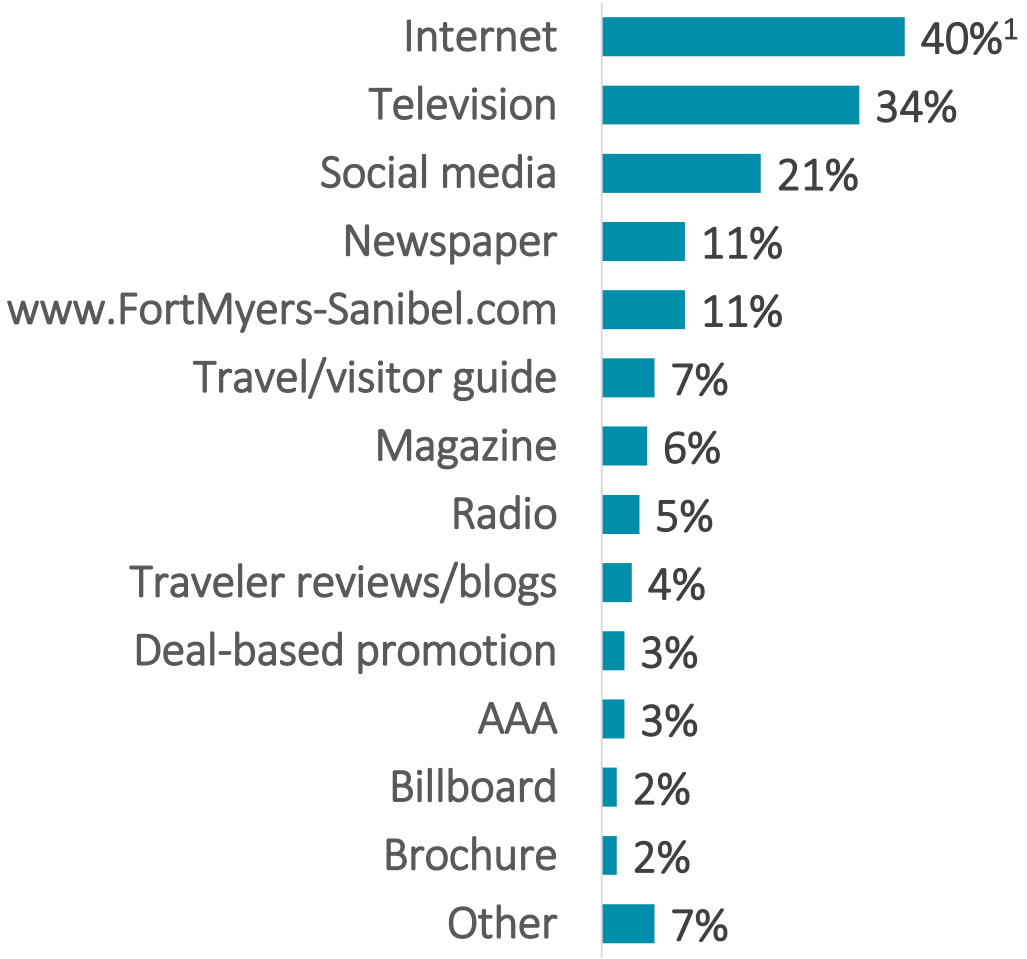
Reason for visiting



[1]Three responses permitted.

Promotions

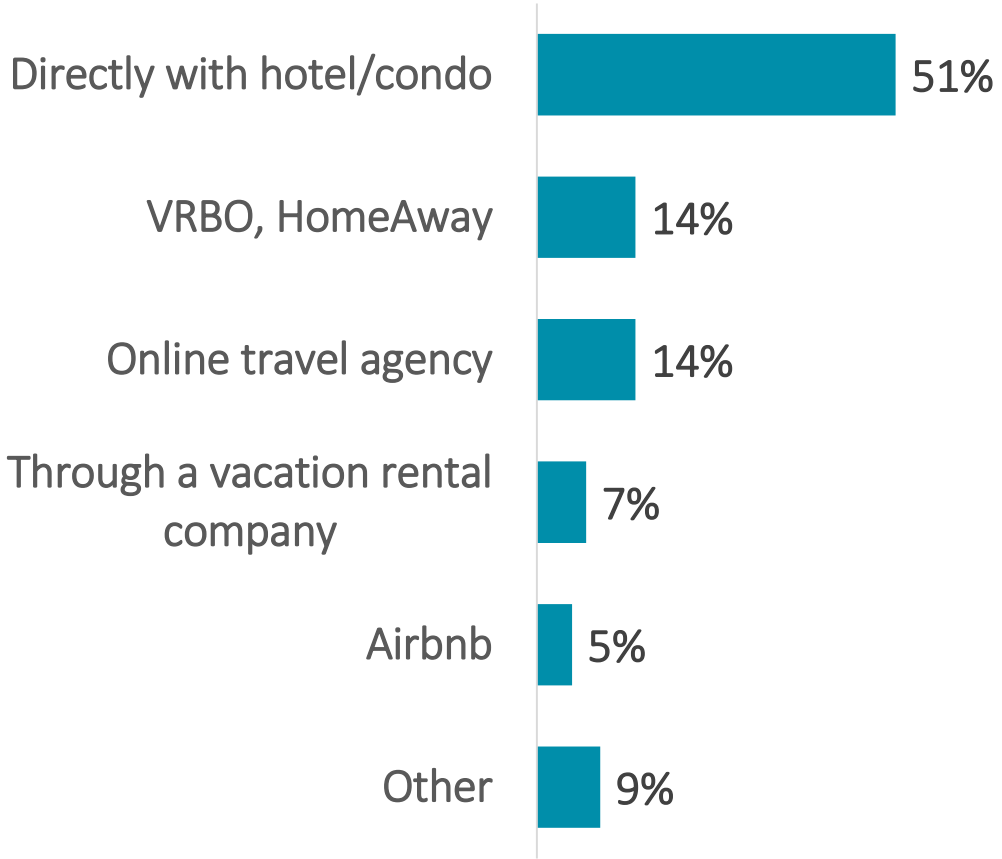
31% of visitors recalled promotions in the past 6 months for The Beaches of Fort Myers & Sanibel.



[1]Multiple responses permitted.

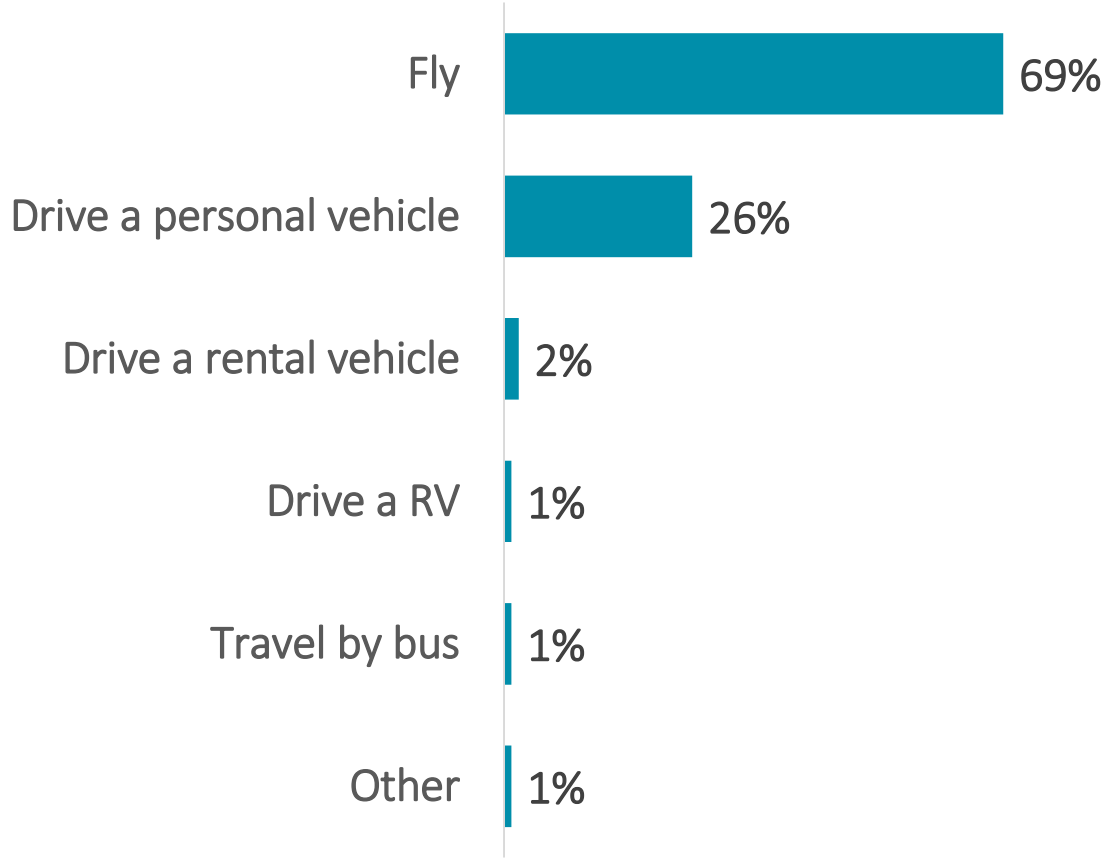
Booking

Half of visitors who stayed in paid accommodations booked directly with a hotel/condo.



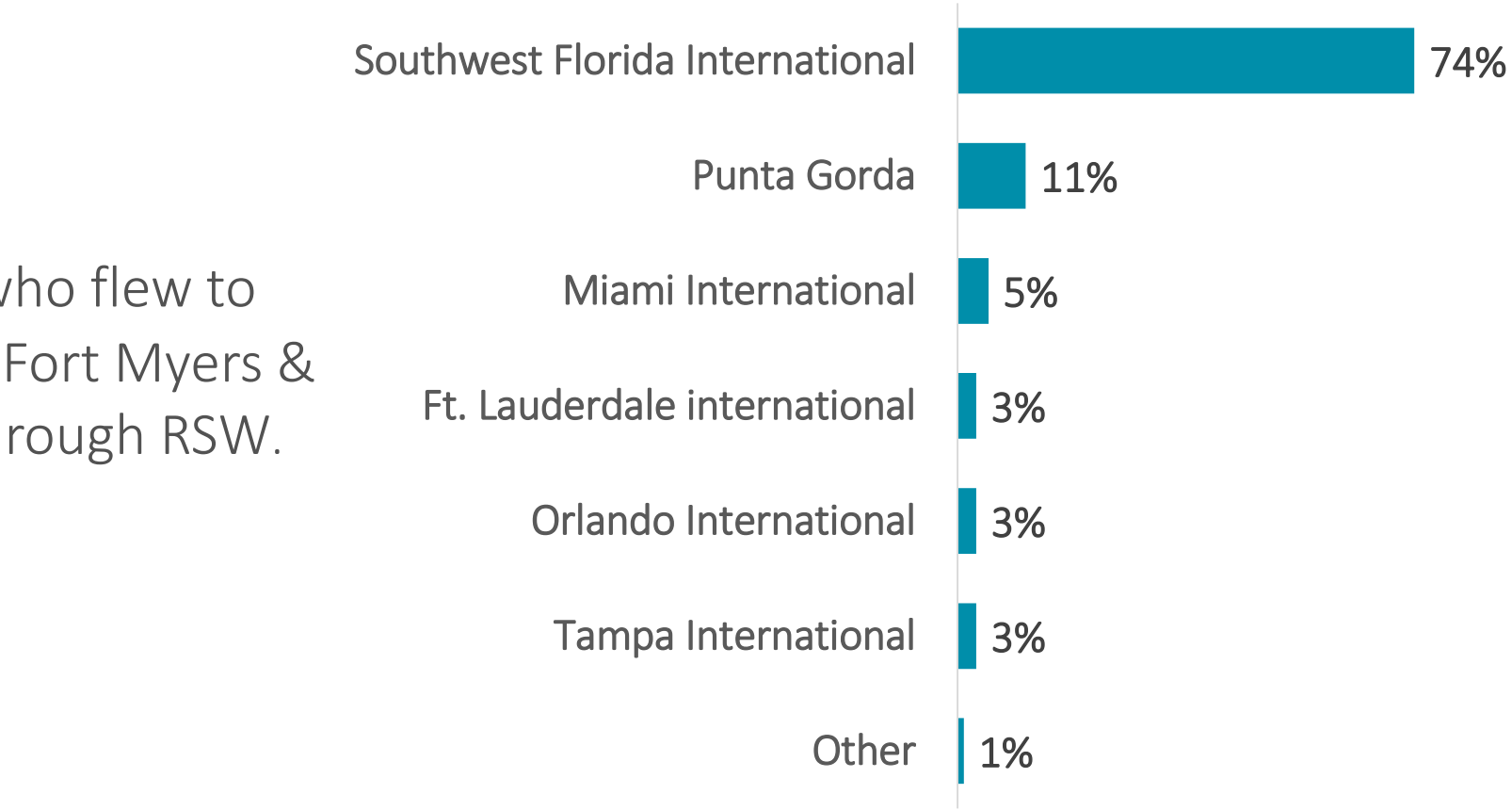
Transportation

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



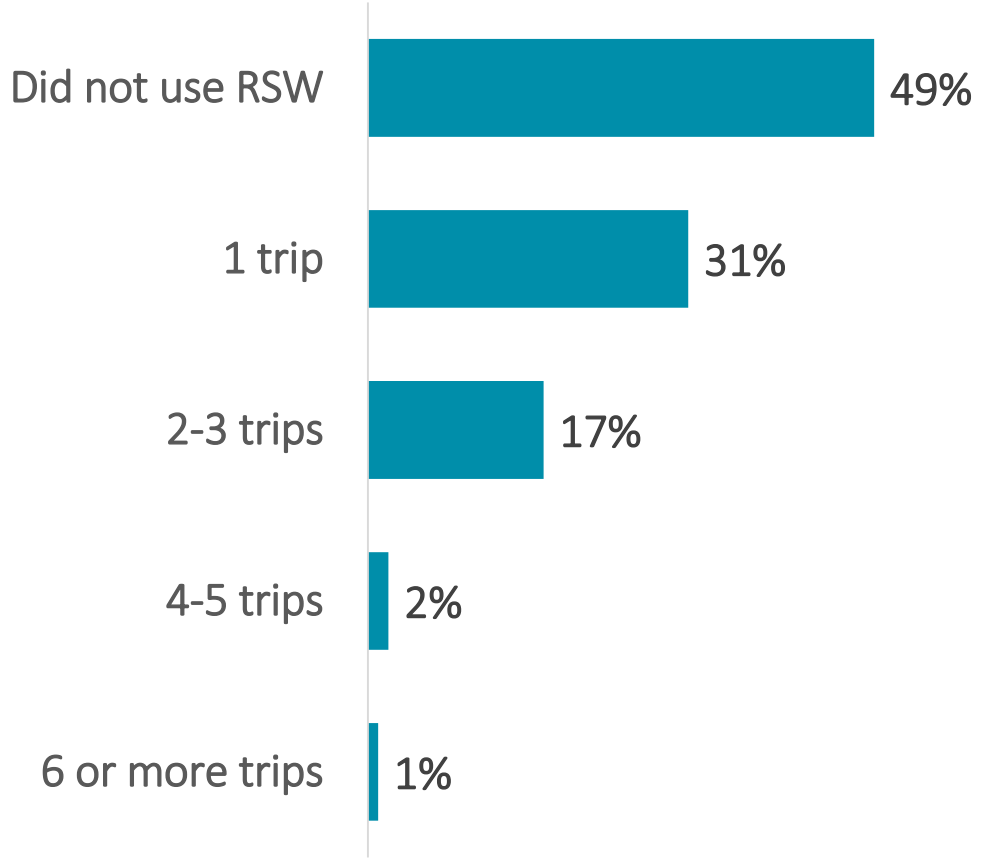
Airport

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

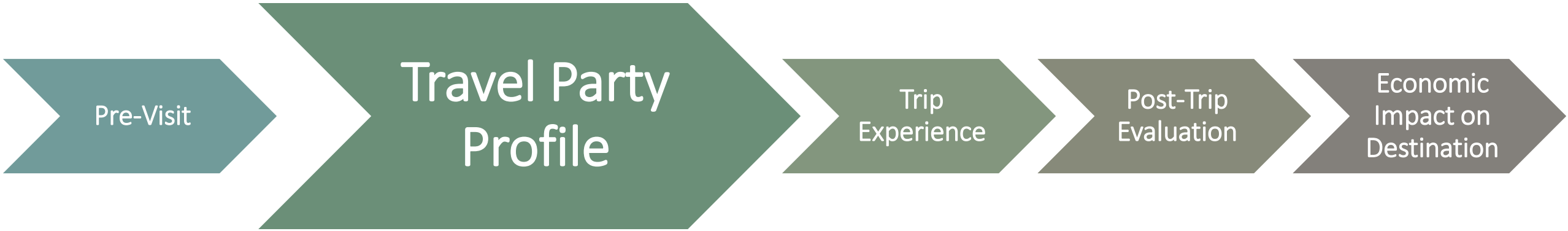


Use of RSW in the Past Year

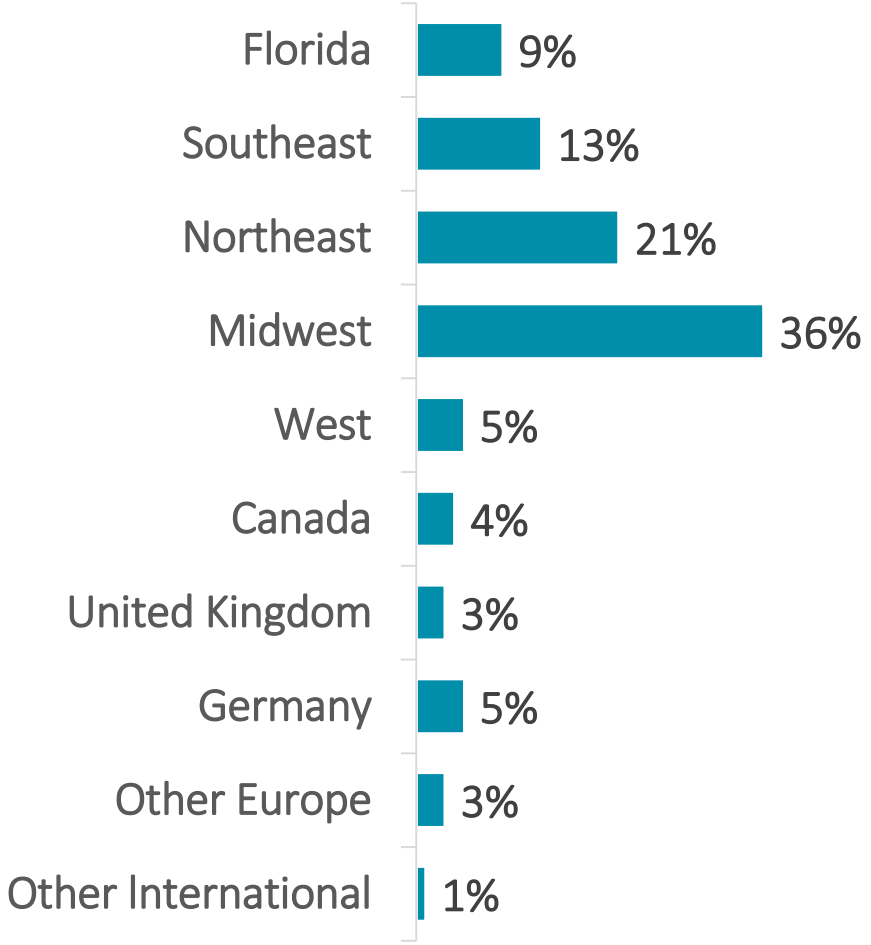
51% of visitors used RSW at least once in the past year.

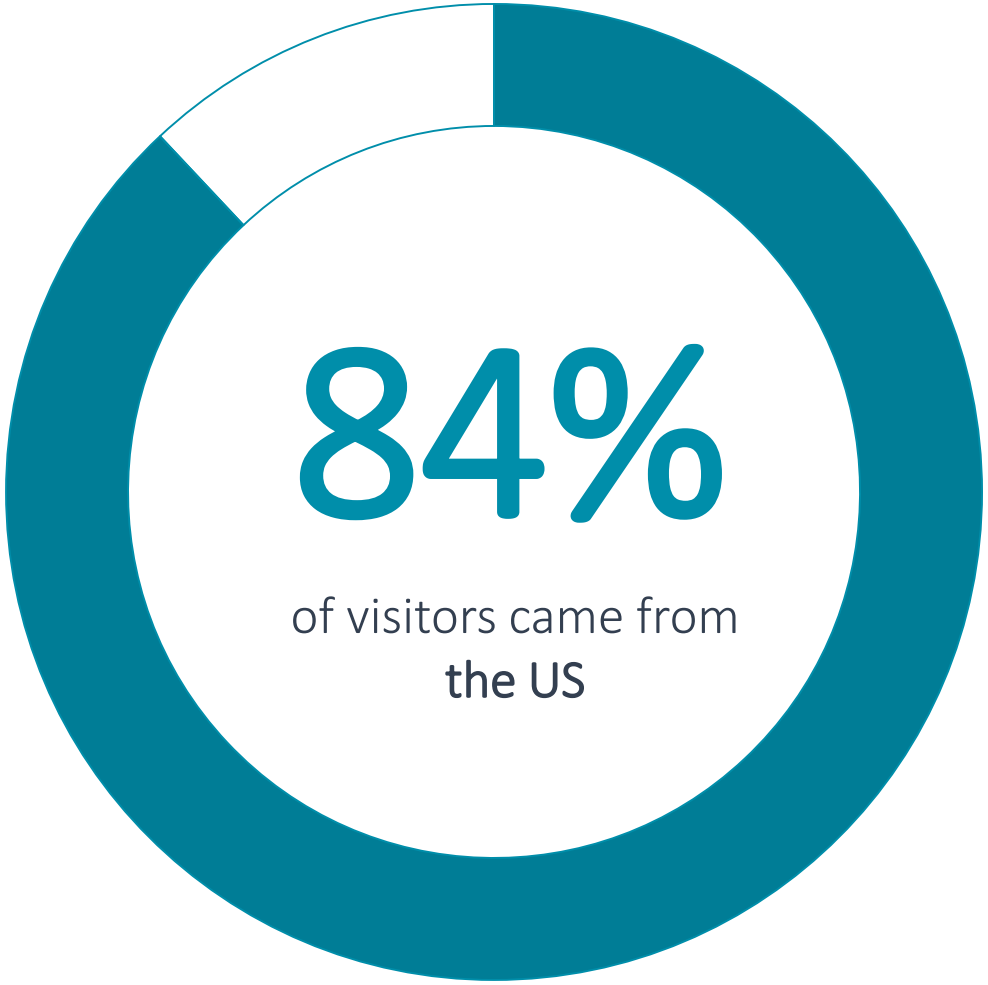


Visitor Journey: Travel Party Profile



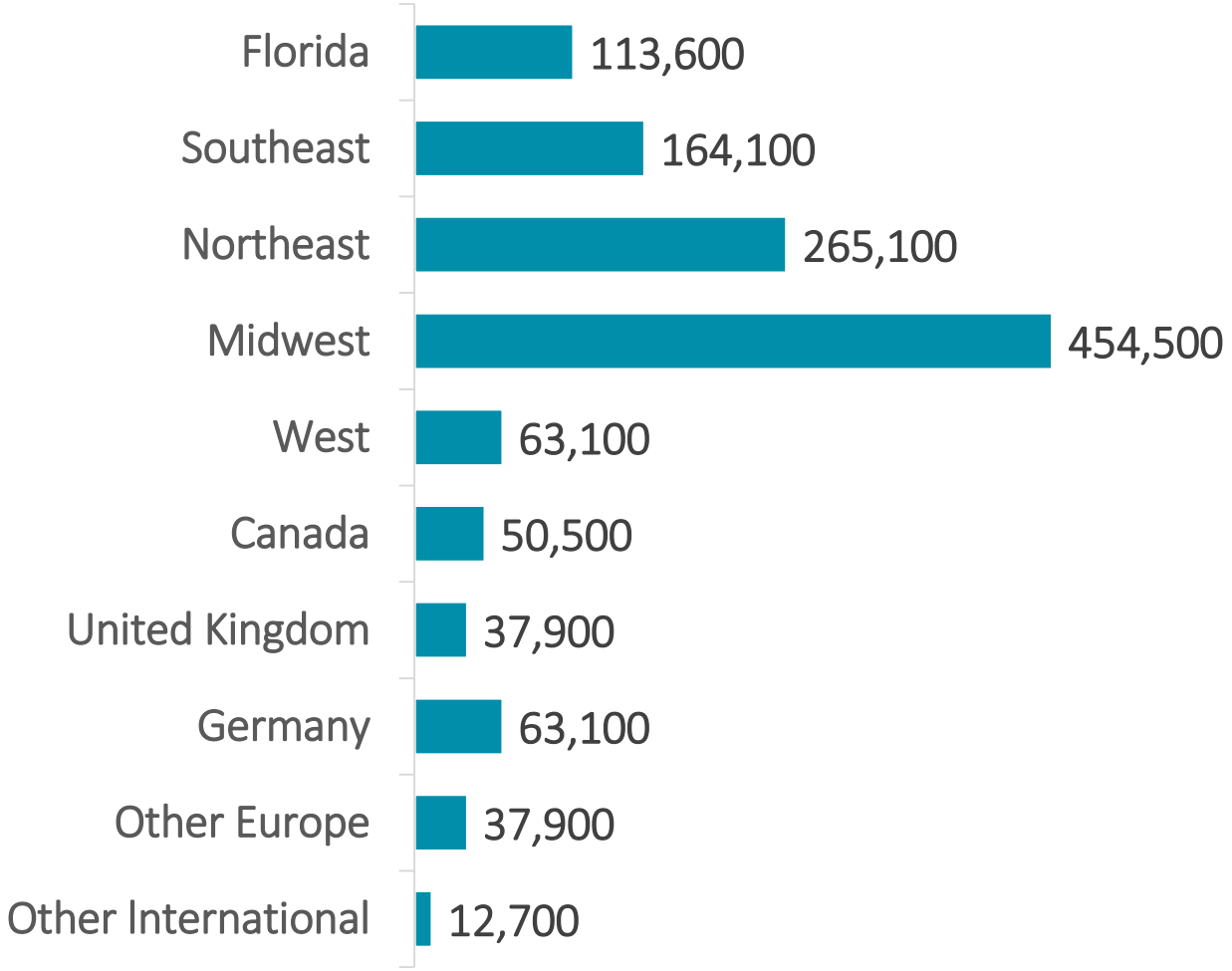
Origin[1]





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

Number of Visitors by Origin



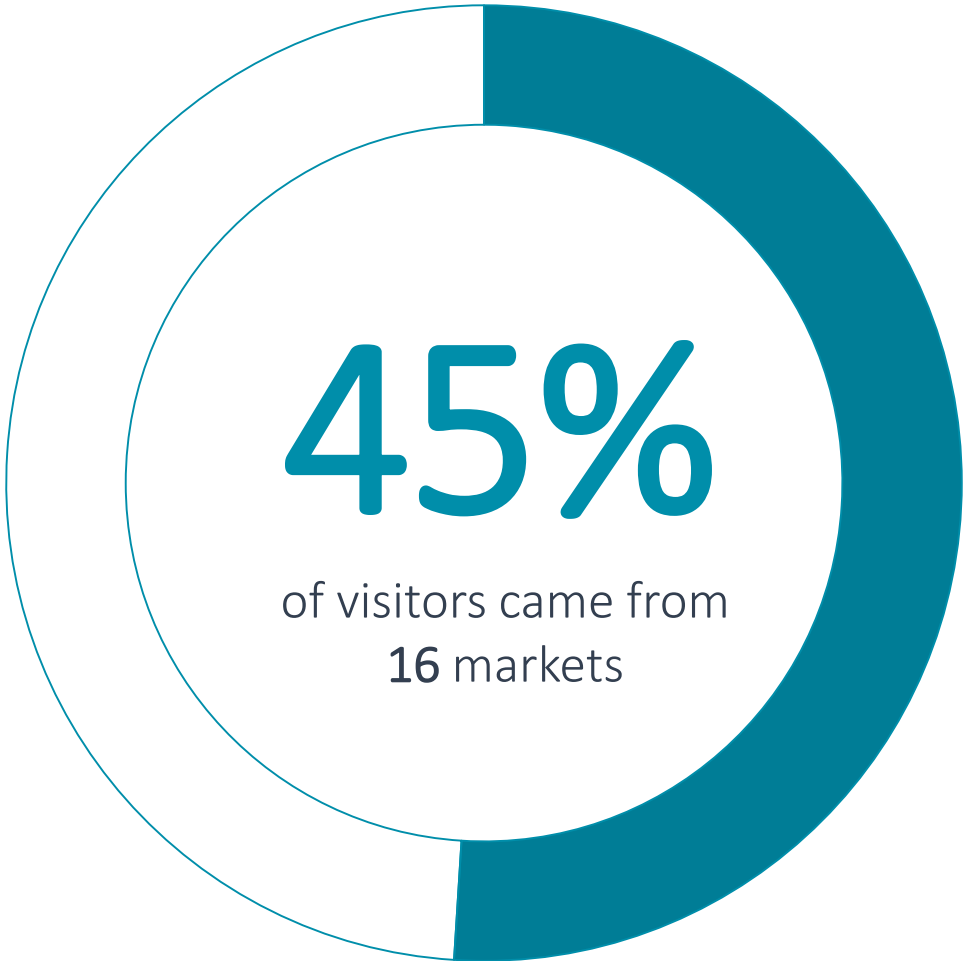
Origin Country

Country[1]	%
United States	84%
Germany	5%
Canada	4%
United Kingdom	3%
Other	4%

[1]1% or fewer visitors came from Switzerland, Sweden, Norway, Brazil, Argentina, Australia, Belgium, China, Colombia, Cuba, Finland, Holland, Iceland, Ireland, Italy, Japan, Lithuania, Netherlands, Philippines, and Taiwan.

Origin Markets[1]

Market	Percentage of Visitors
Chicago	5%
New York	4%
Boston	4%
Minneapolis-Saint Paul	4%
Tampa-St. Pete-Sarasota	3%
Detroit	3%
Miami-Ft. Lauderdale	3%
Cleveland-Akron	3%
Indianapolis	2%
Milwaukee	2%
Cincinnati	2%
Washington DC-Baltimore	2%
Naples	2%
Green Bay-Appleton	2%
Philadelphia	2%
St. Louis	2%



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

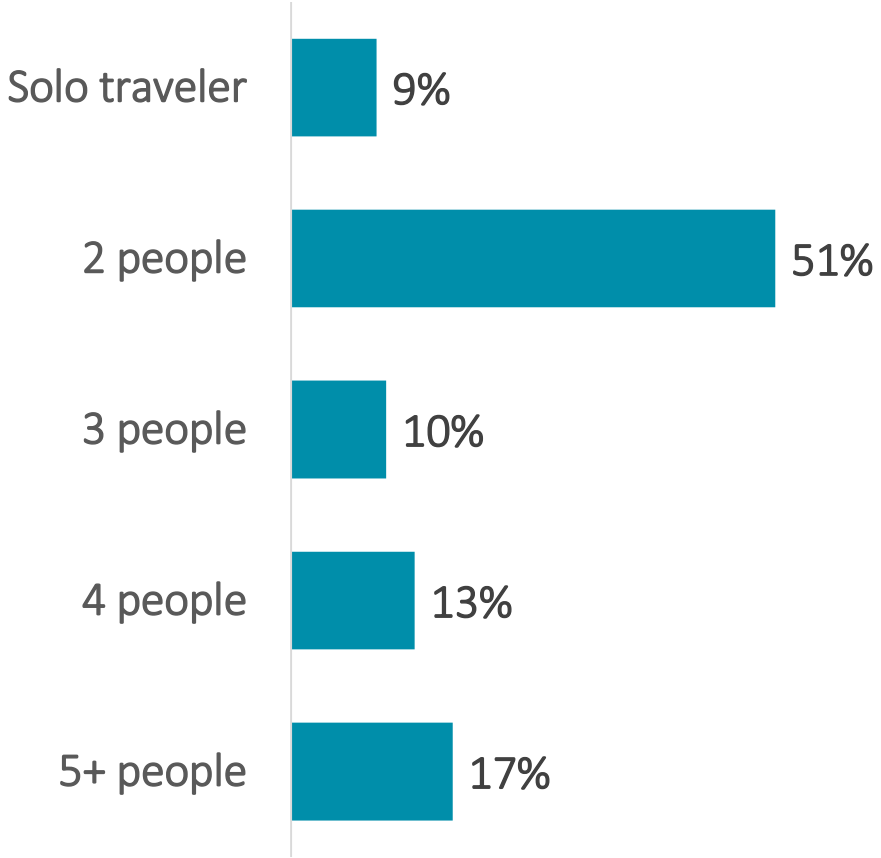
Travel Party Size and Composition

Travel Party Size

Visitors traveled in a party composed of **3.2**[1] people.

Travel with Children

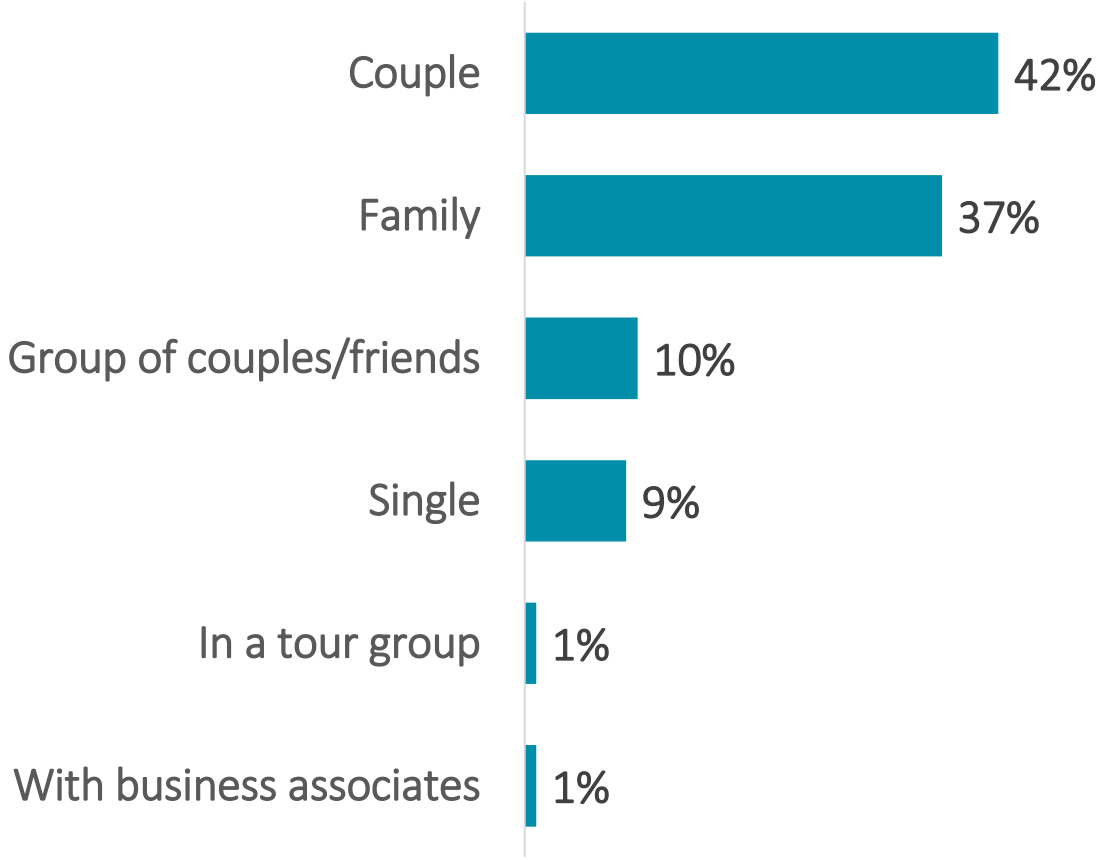
29% of visitors traveled with children under the age of 18.



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

Travel Party Type

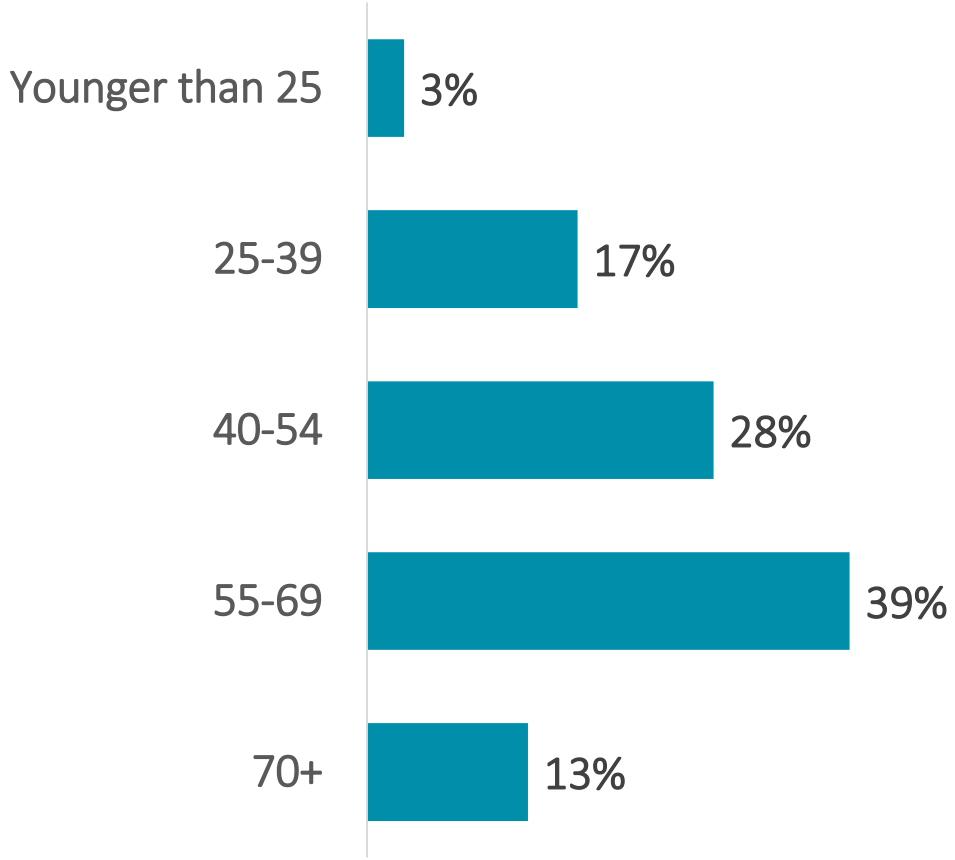
42% of visitors traveled as a couple, while **37%** traveled as a family.



Age

Average Age

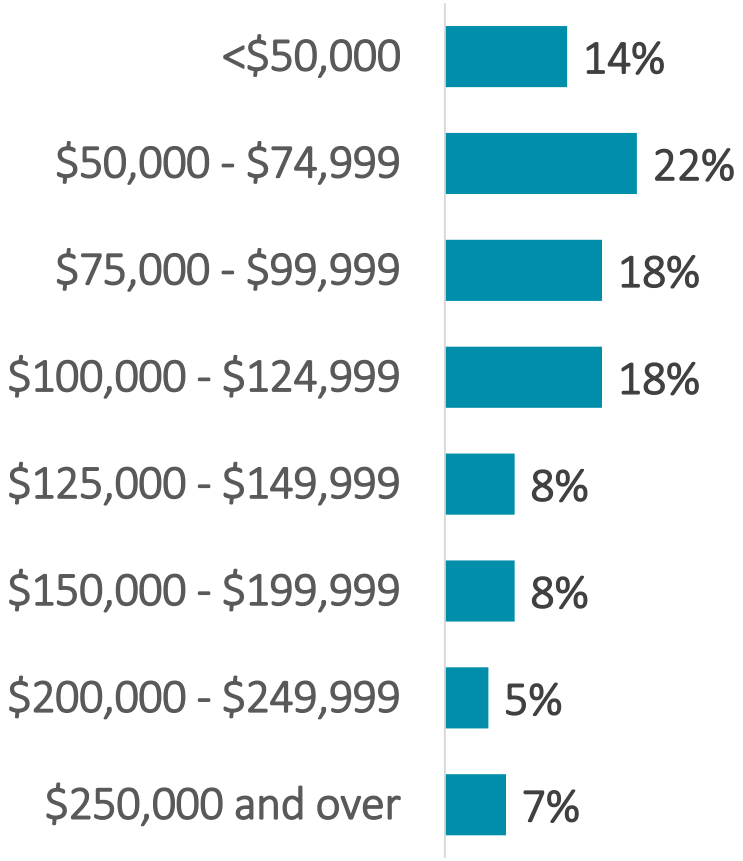
The average age of April – June visitors was **53 years old.**



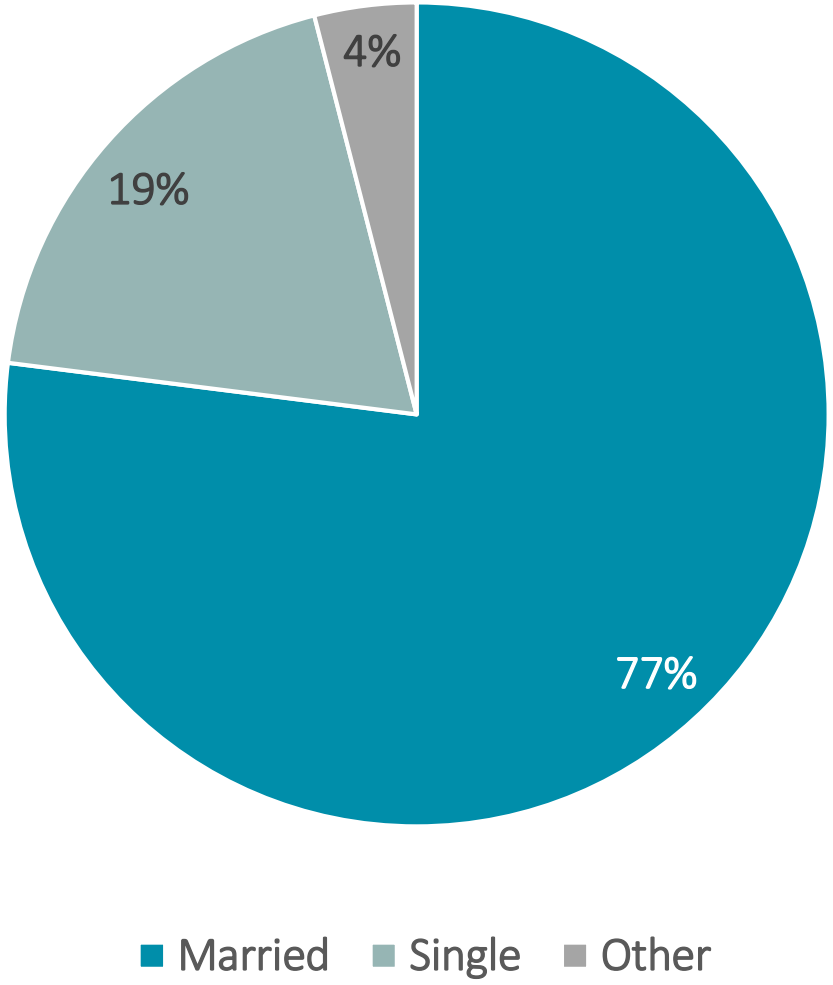
Household Income

Median Household Income

April – June visitors had a median household income of **$94,400.**



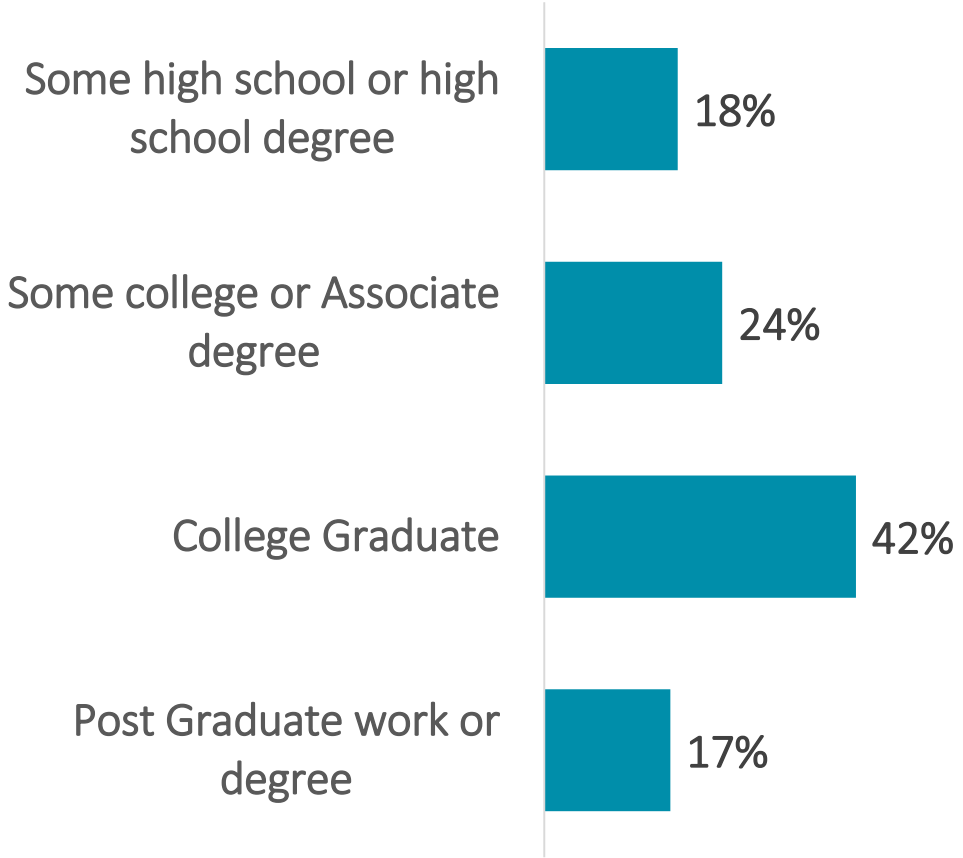
Marital Status



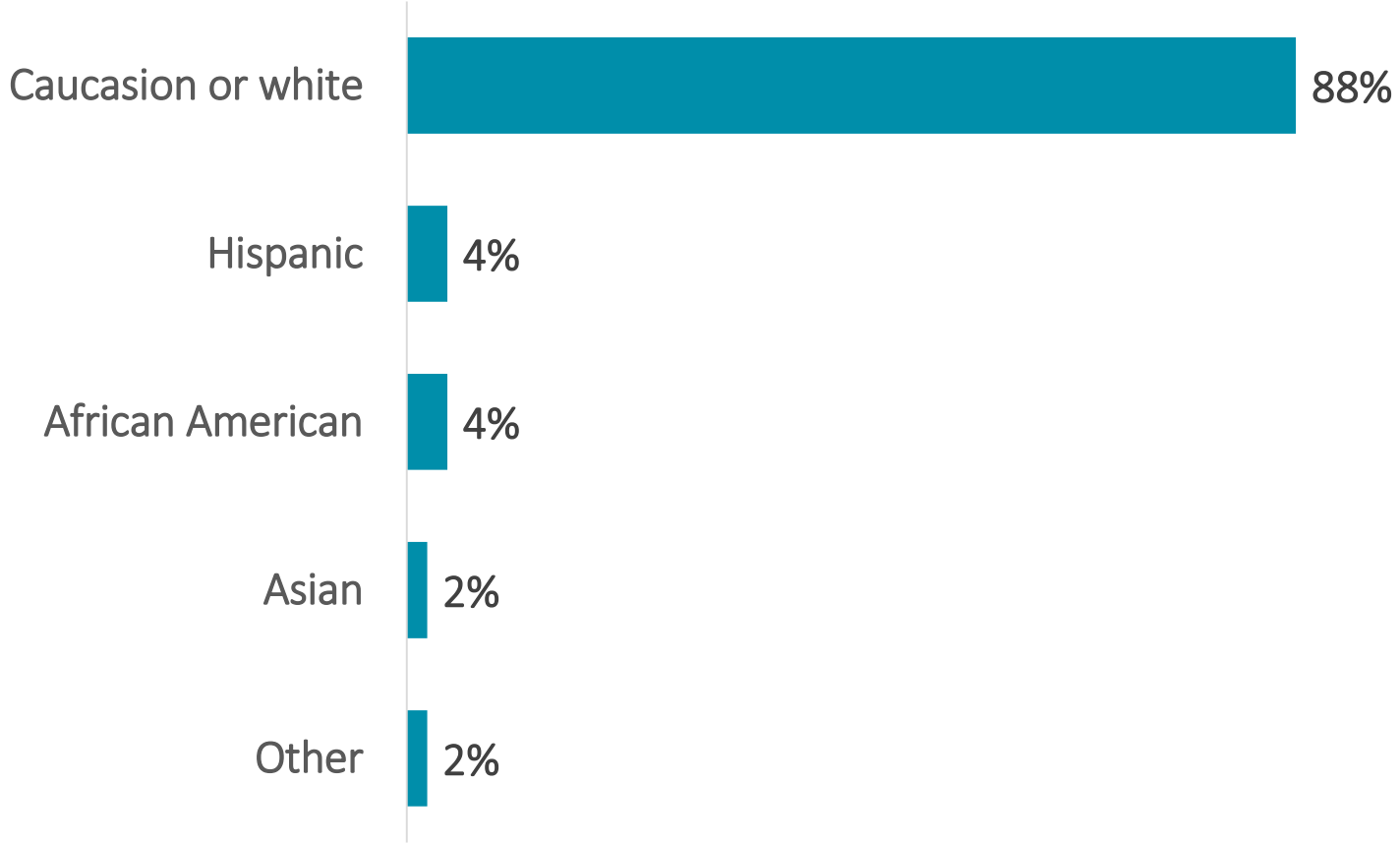
Education

College Education

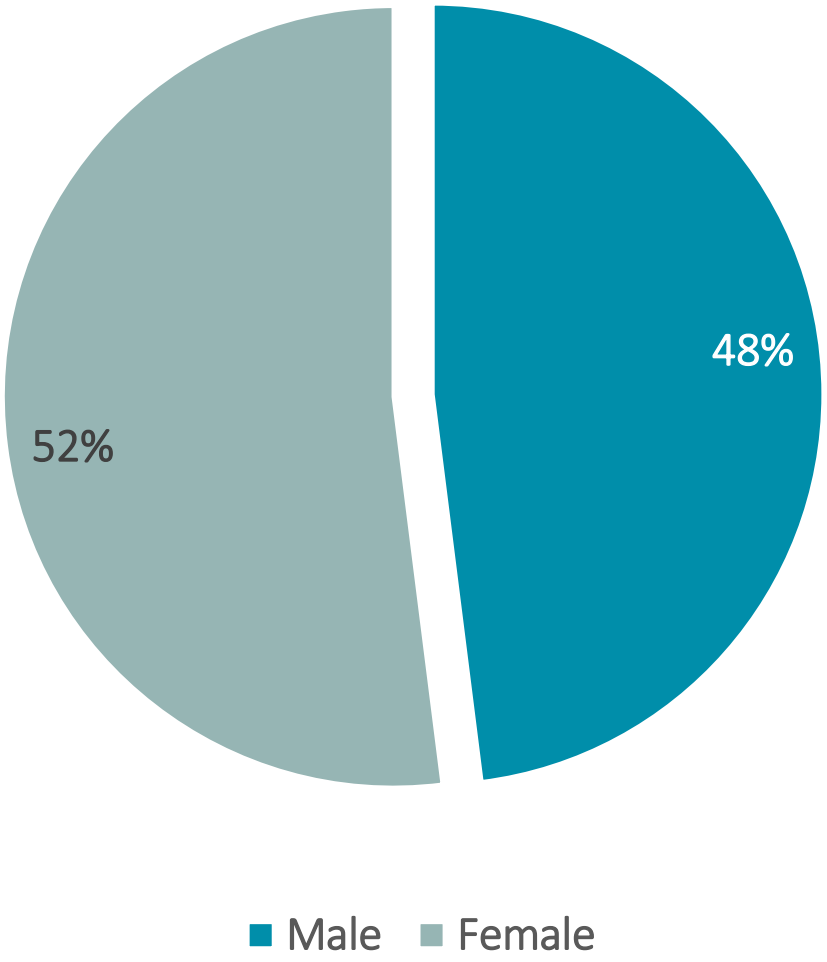
59% of April – June visitors were college graduates.



Race/Ethnicity



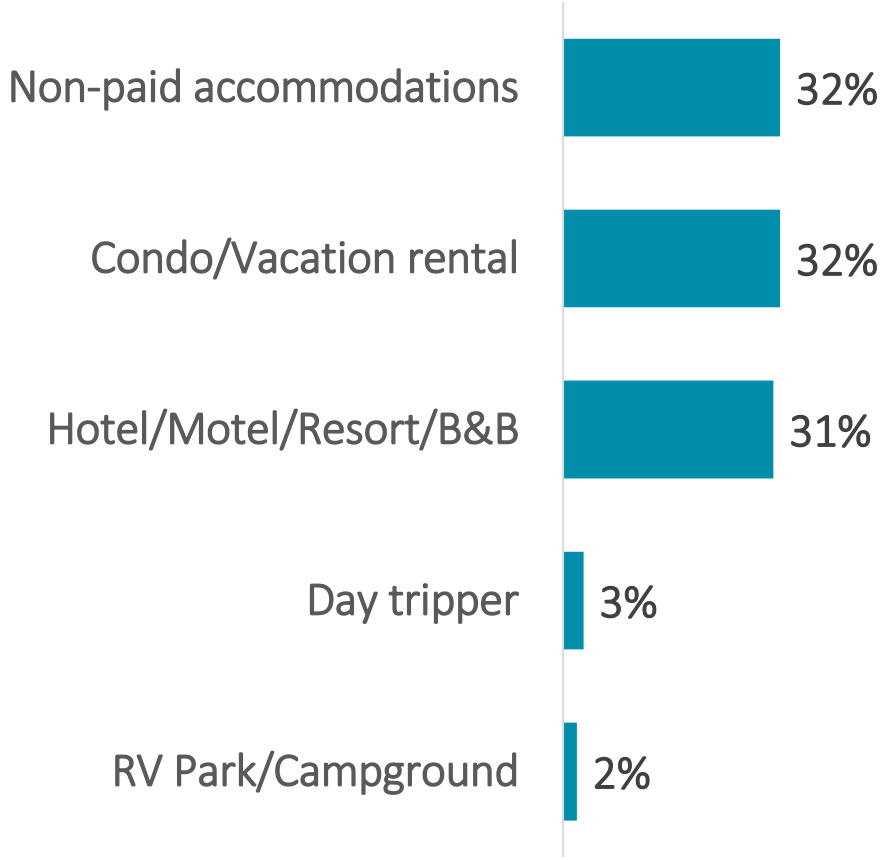
Gender



Visitor Journey: Trip Experience

Accommodations

1 in 3 visitors stayed in non-paid accommodations, a condo/vacation rental, or a hotel/motel/resort/B&B.



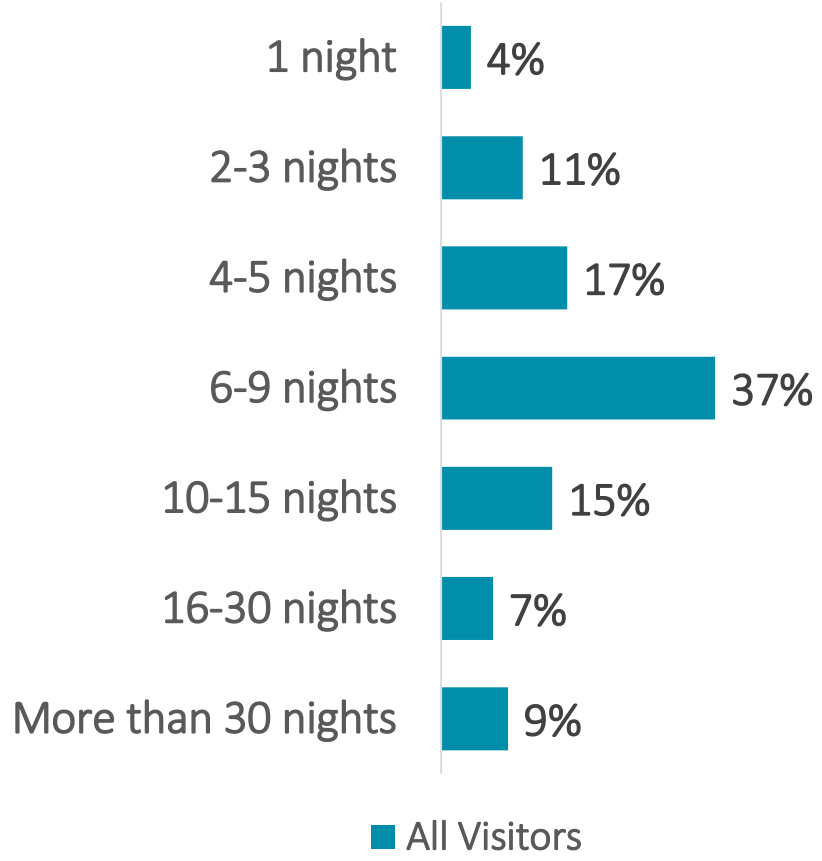
Nights Stayed

All Visitors

Visitors spent **7.4**[1] nights in The Beaches of Fort Myers & Sanibel.

Visitors Staying in Paid Accommodations

Visitors staying in paid accommodations spent **4.7**[2] nights in The Beaches of Fort Myers & Sanibel.

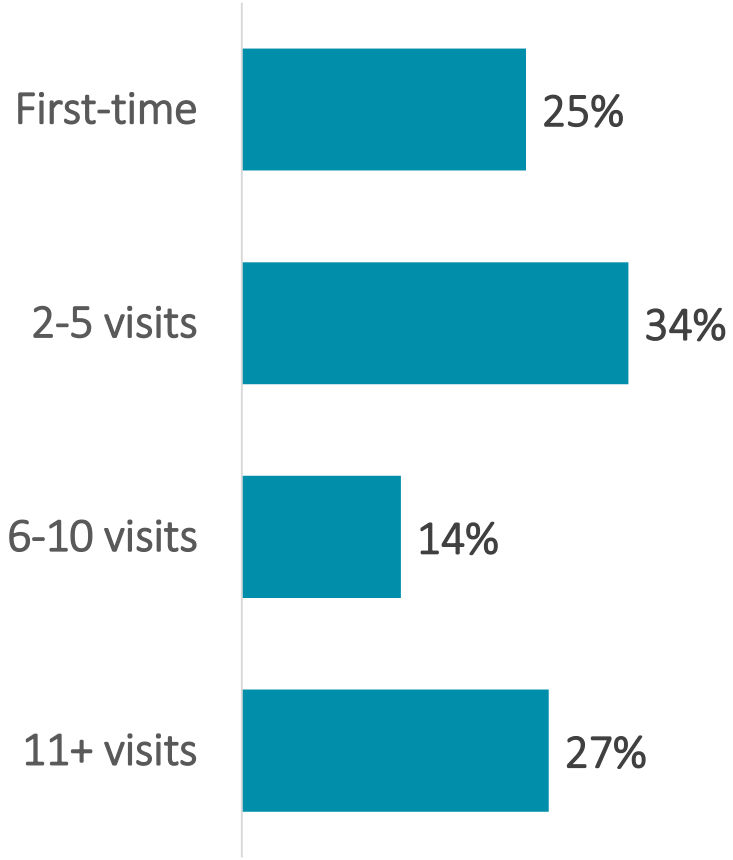


[1]When including extended stay visitors, average nights stayed for all visitors was 17.7 nights.
[2]When including extended stay visitors, average nights stay for visitors staying in paid accommodations was 11.8 nights.

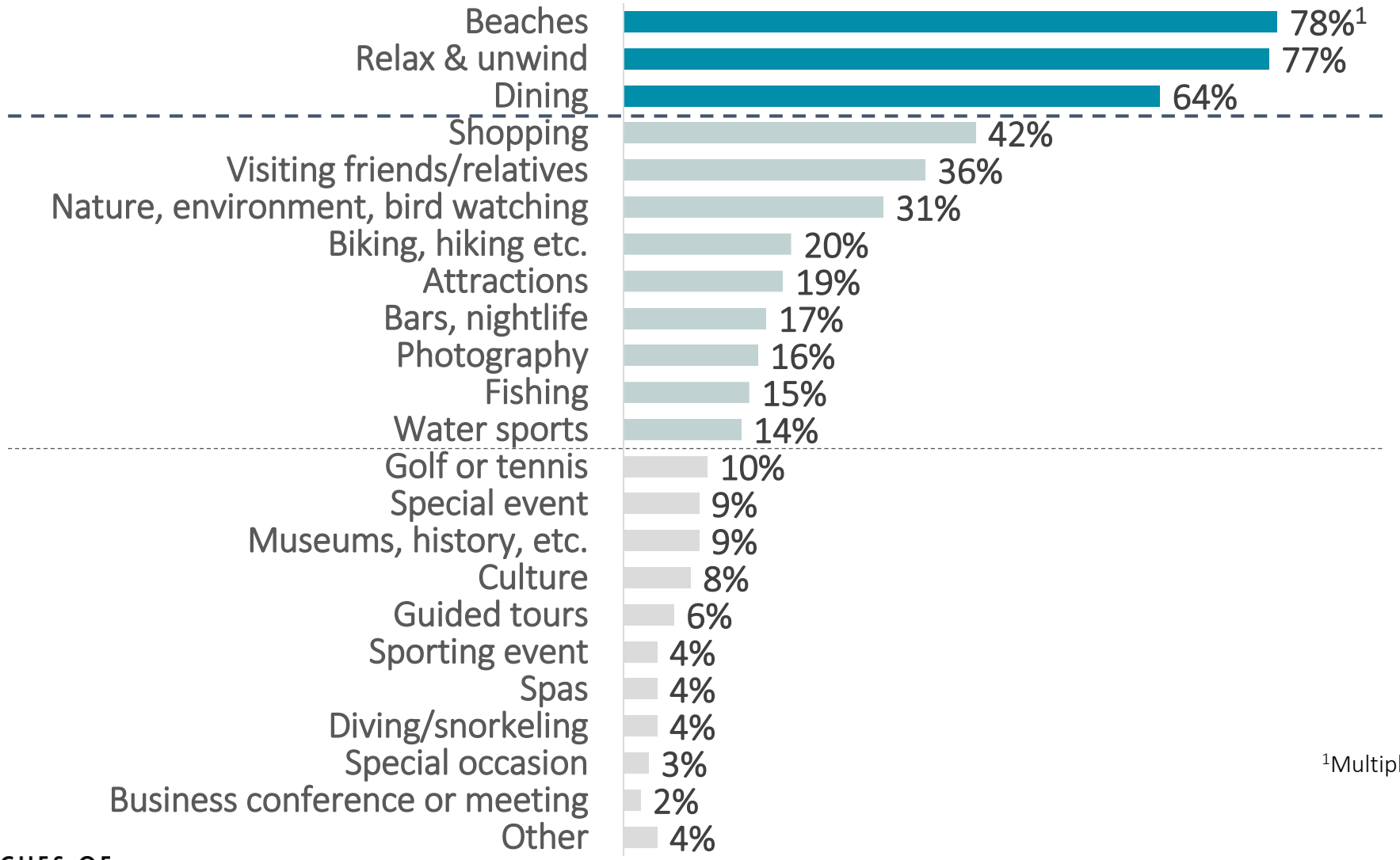
First Time and Experienced Visitors

First Time vs. Repeat Visitors

75% of visitors were repeat visitors, while **25%** were visiting for the first time.

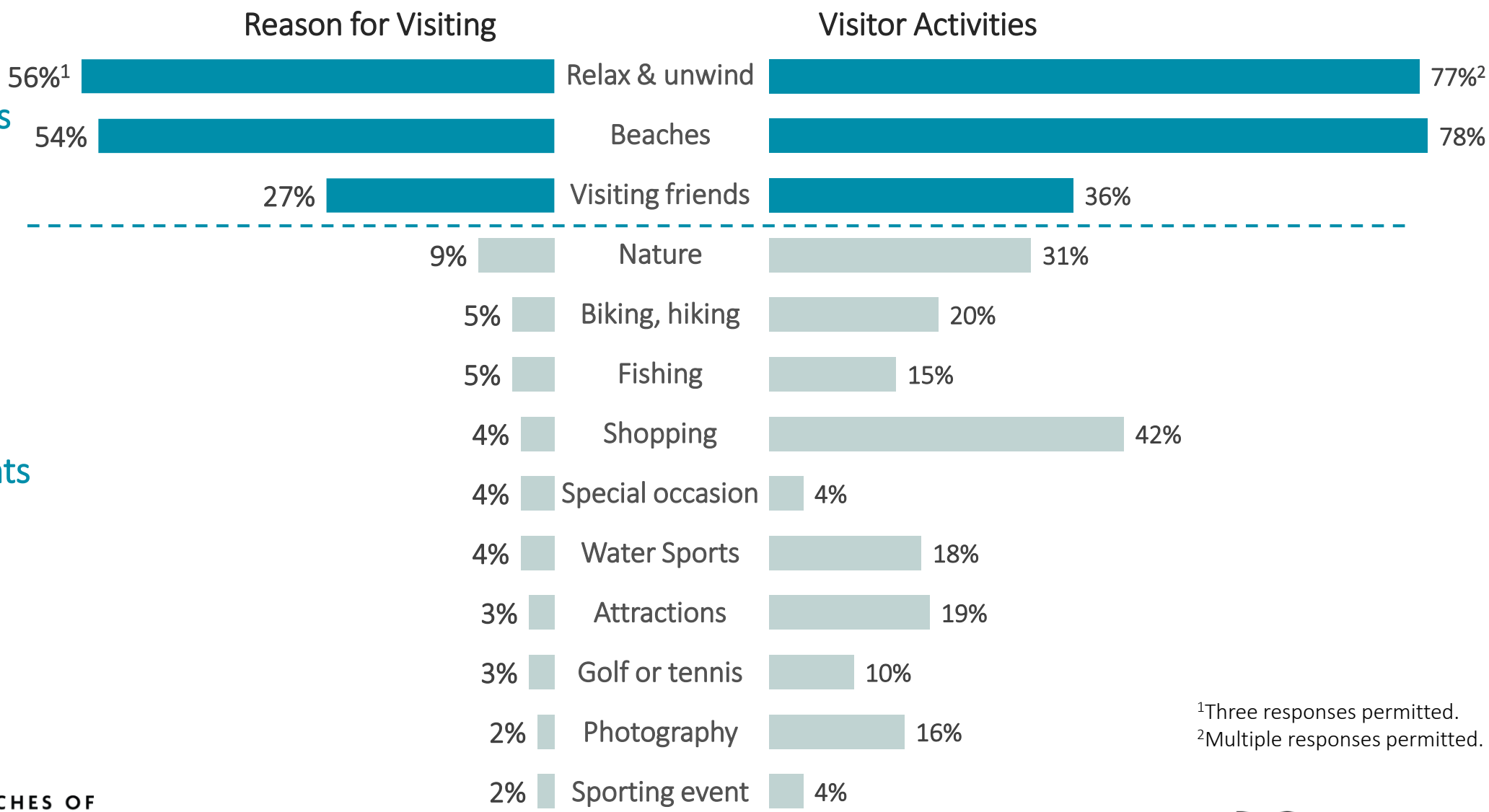


Visitor Activities



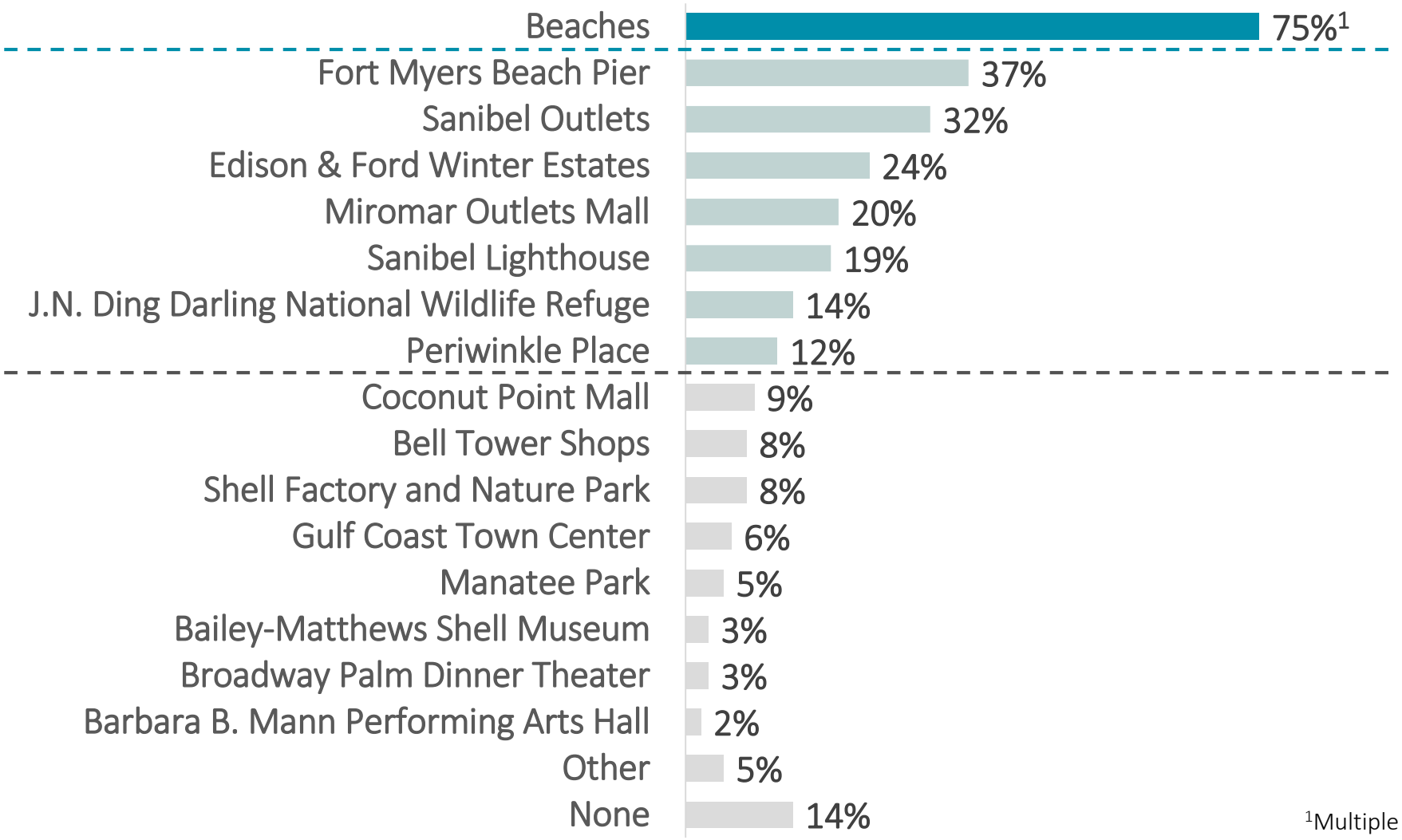
[1]Multiple responses permitted.

Reason for Visiting vs. Visitor Activities



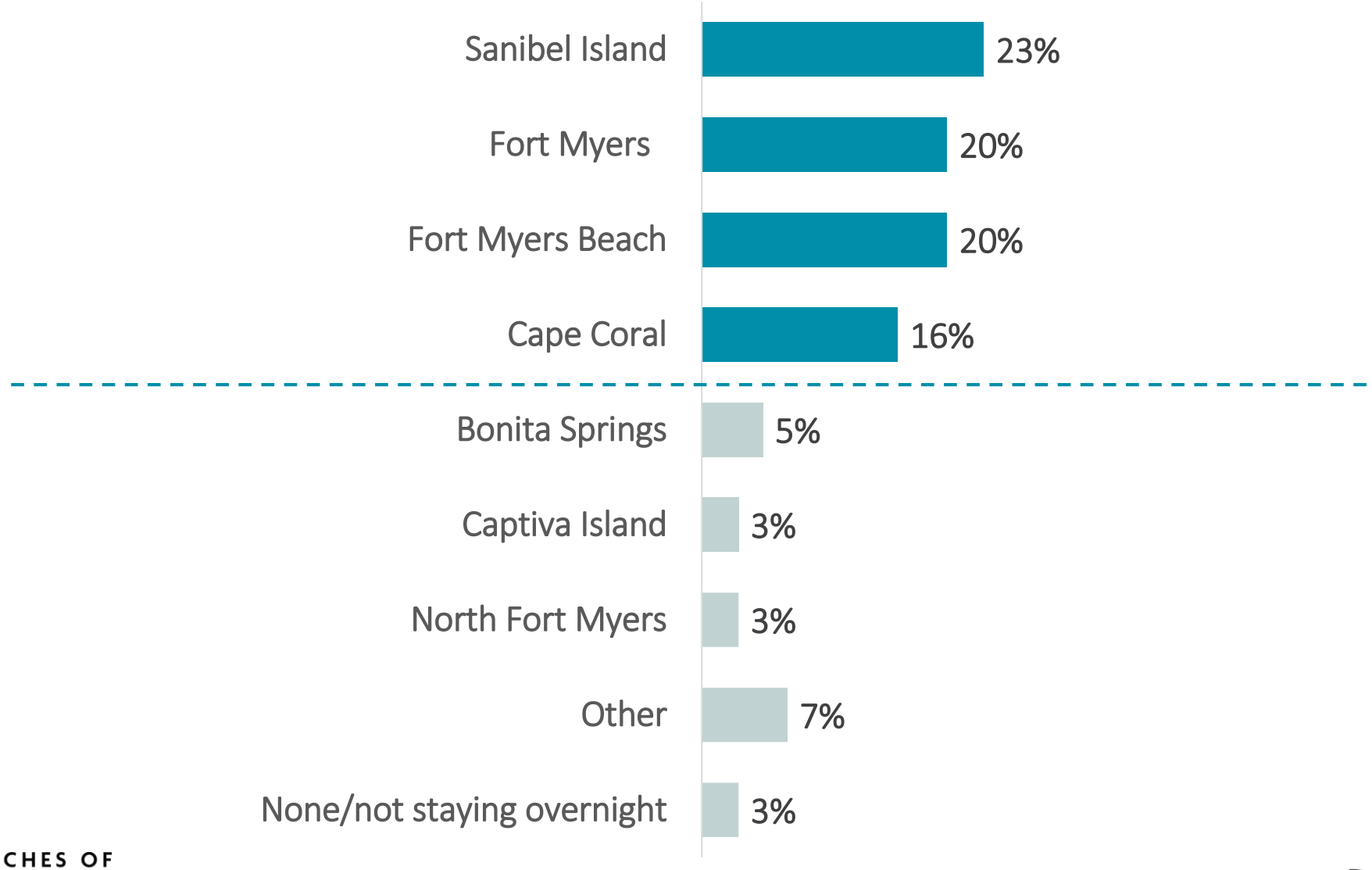
[1]Three responses permitted.
[2]Multiple responses permitted.

Attractions Visited



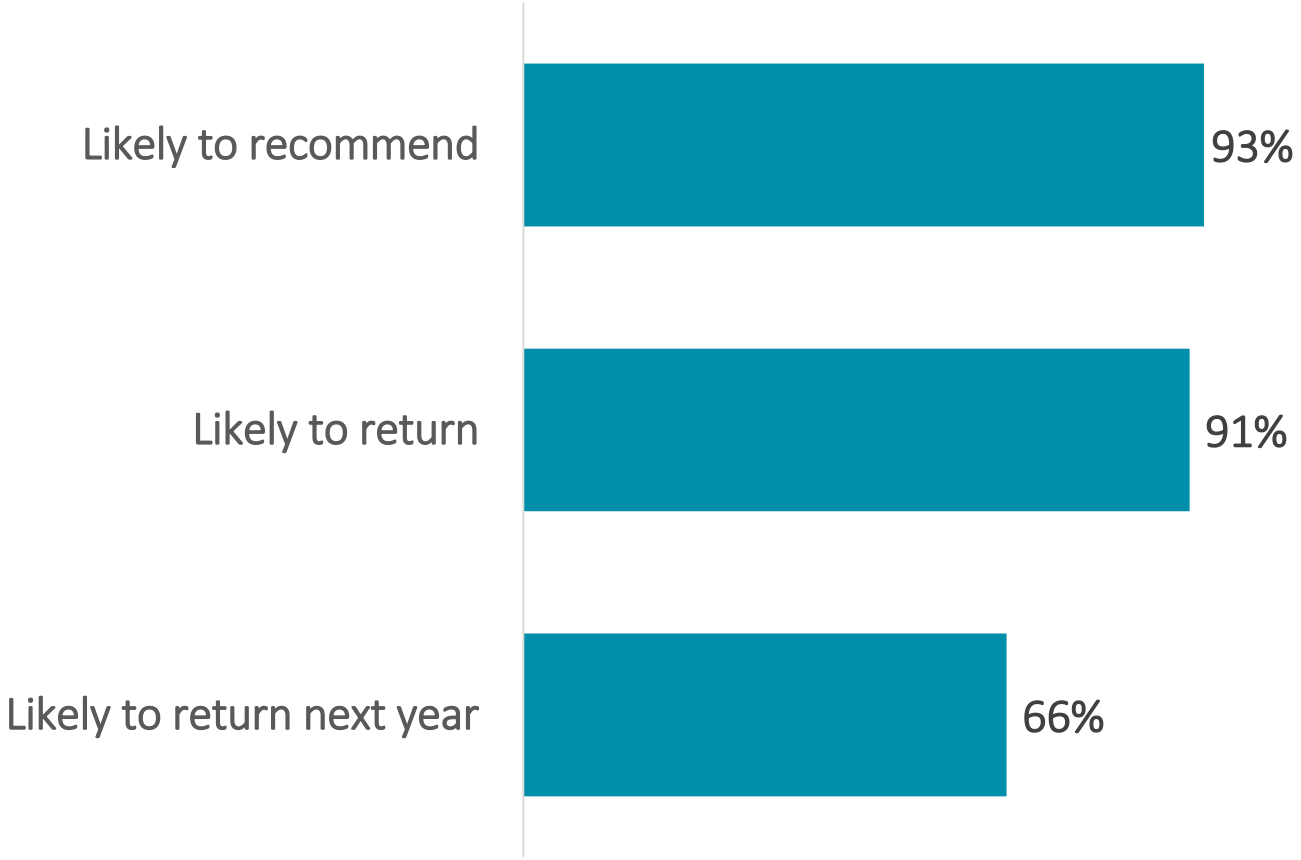
[1]Multiple responses permitted.

Community Stayed



Visitor Journey: Post-Trip Evaluation

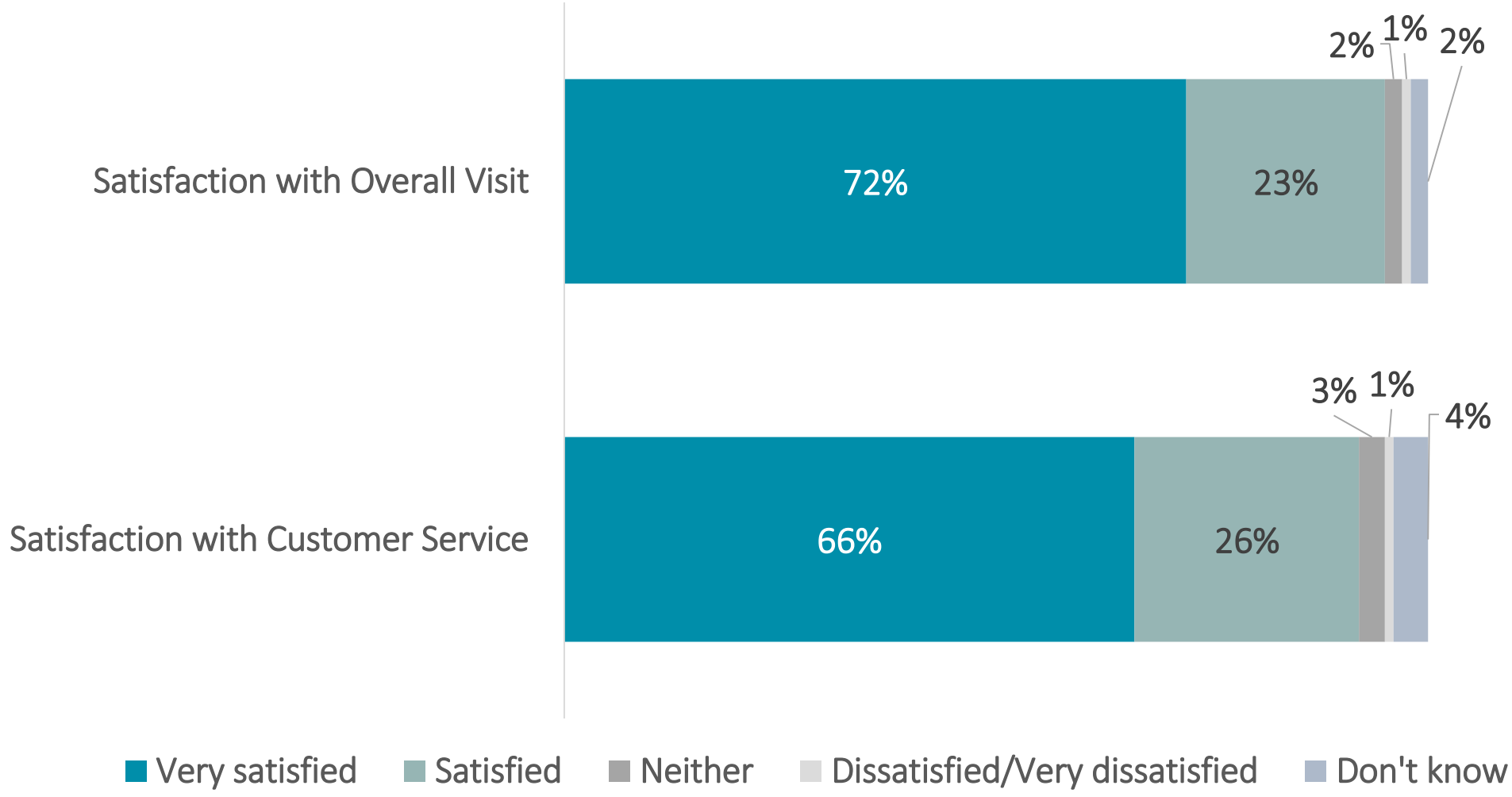
Satisfaction



Satisfaction Ratings

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2018	2019	2018	2019	2018	2019	2018	2019
Likely to Recommend	87%	90%	92%	95%	90%	93%	94%	91%
Likely to Return	79%	82%	93%	94%	92%	92%	86%	88%
Likely to Return Next Year	36%	43%	57%	72%	52%	66%	60%	66%

Satisfaction



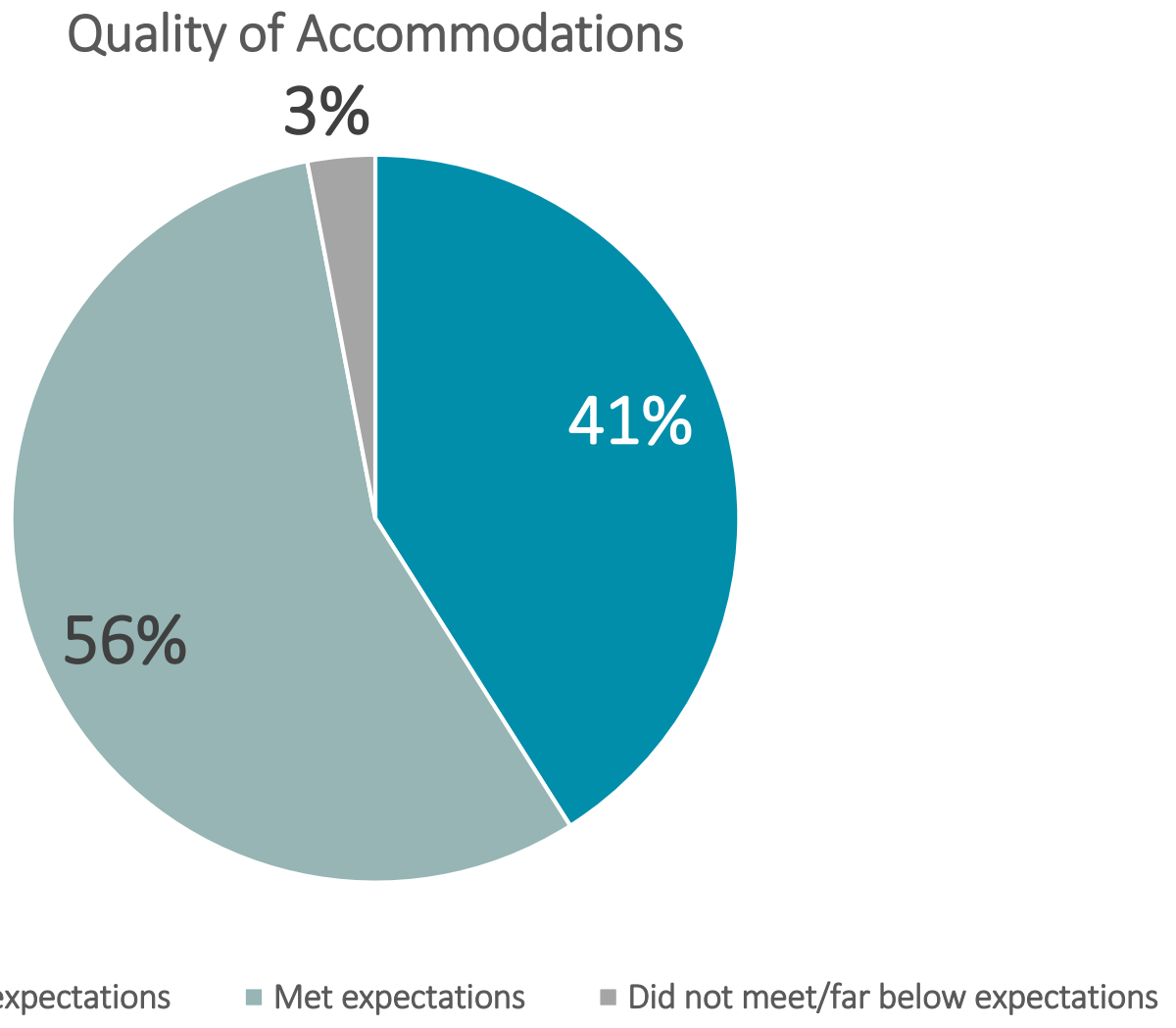
Satisfaction Ratings: Overall Visit

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2018	2019	2018	2019	2018	2019	2018	2019
Very Satisfied	52%	70%	65%	78%	59%	73%	57%	72%
Satisfied	42%	24%	30%	18%	36%	24%	39%	23%

Satisfaction Ratings: Customer Service

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2018	2019	2018	2019	2018	2019	2018	2019
Very Satisfied	46%	64%	43%	66%	44%	67%	39%	62%
Satisfied	36%	25%	44%	26%	42%	26%	48%	27%

Satisfaction

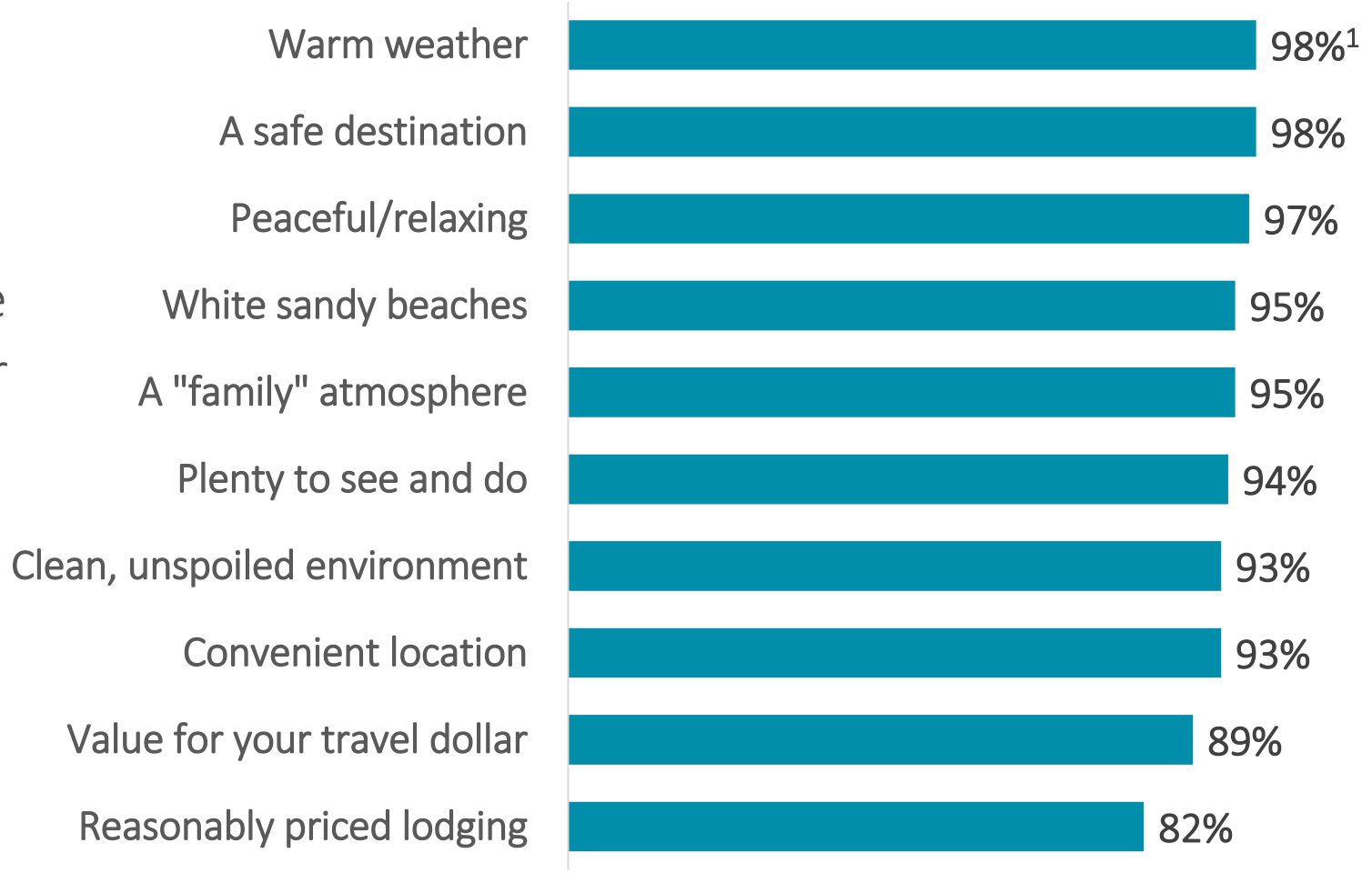


Satisfaction Ratings: Quality of Accommodations

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2018	2019	2018	2019	2018	2019	2018	2019
Exceeded Expectations	42%	48%	41%	45%	47%	41%	46%	53%
Met Expectations	54%	50%	52%	51%	44%	54%	40%	39%
Did Not Meet Expectations	3%	2%	4%	4%	2%	3%	4%	3%

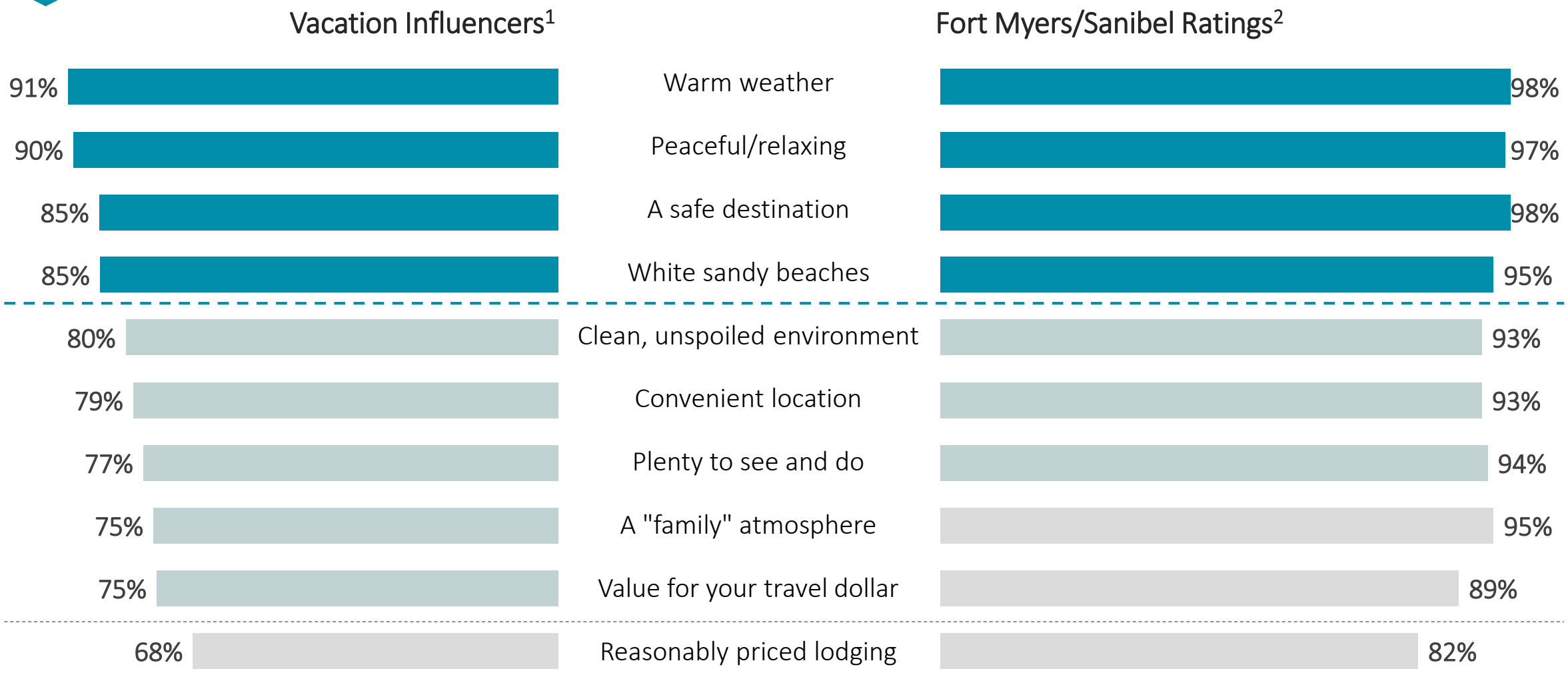
Attribute Ratings

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



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

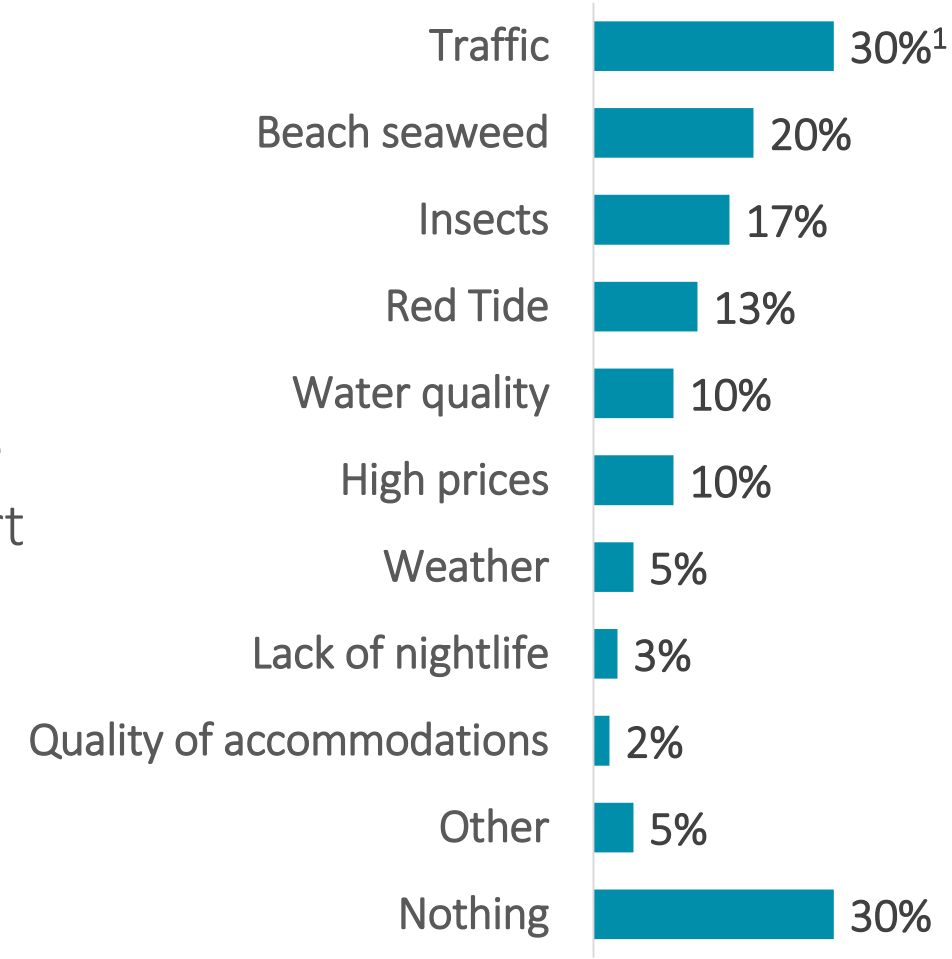
Vacation Attribute Influence vs. Ratings



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

Visitor Concerns

3 in 10 visitors indicated traffic was a concern while visiting The Beaches of Fort Myers & Sanibel.



[1]Multiple responses permitted.

Area Descriptions

Visitors describe The Beaches of Fort Myers & Sanibel as a **wonderful place to visit**.

[1]Coded verbatim responses; multiple responses permitted.

Area Descriptions

Wonderful place to visit

- "A wonderful and relaxing combination of safe and family friendly beach destination, eco-tourism, food, drinks and activities."
- "When I cross the bridge to Sanibel after a winter in the northeast, I feel like it is the light at the end of the tunnel. The turquoise waters and white beaches welcome me and provide much needed rest and relaxation."
- "It's a great place to stay and visit. It's safe, friendly, and not too expensive."

Beautiful Beaches

- "Beautiful, happy, warm, sunny – you have to spend the day here, it's heaven."
- "Gorgeous, warm little piece of paradise."
- "Beautiful, relaxing beaches with good fishing, good food and good friends, whether you know them or just met them."
- "A very beautiful relaxing area with shell covered beaches, great restaurants, beautiful scenery."

Area Descriptions

Relaxing and Peaceful

- "This area is great for relaxing, and spending quality time with family. I always enjoy my visits particularly the local food."
- "Peaceful, family-friendly environment where you can unwind and relax."
- "A nice relaxing area. I enjoyed photographing the sunrises on the beach and finding beautiful shells during my morning walks."
- "Relaxing getaway with good food and entertainment options."

Warm weather

- "Great weather, comfortable and safe surroundings."
- "Very tropical and sunny with a lot of different things to do."
- "Relaxing, hot and humid. Perfect beach weather."
- "I came down here to unwind and get away from the cold. So far I have been enjoying myself. I am also going to other areas of Florida, but as for this area I am completely satisfied."

Occupancy Barometer: July – September Reservations

July – Sept Reservations	April – June 2018	April – June 2019
Up	34%	24%
Same	33%	33%
Down	25%	42%
Not Sure	8%	1%

Occupancy Barometer: October – December Reservations

Oct – Dec Reservations	April – June 2018	April – June 2019
Up	38%	17%
Same	40%	54%
Down	14%	19%
Not Sure	8%	10%

Quarterly Comparisons

Economic Impact

Visitor & Lodging Statistics	April – June 2018	April – June 2019	% Change
Visitors	1,345,197	1,262,500	-6.1%
Room Nights	1,287,038	1,309,000	+1.7%
Direct Expenditures	$755,450,385	$727,686,800	-3.7%
Total Economic Impact	$1,226,851,500	$1,181,763,400	-3.7%
Occupancy	65.5%	63.6%	-2.9%
ADR	$131.24	$130.52	-0.5%
RevPAR	$85.96	$83.01	-3.4%

Jobs, Wages and Taxes Supported by Tourism

	April – June 2018	April – June 2019	% Change
Direct Jobs	10,305	9,795	-4.9%
Total Jobs	14,377	13,616	-5.3%
Direct Wages	$232,700,000	$227,418,700	-2.3%
Total Wages	$378,700,000	$371,877,000	-1.8%
Direct Local Taxes	$23,300,000	$23,213,200	-0.4%
Total Local Taxes	$43,400,000	$41,716,300	-3.9%
Direct State Taxes	$54,800,000	$51,738,500	-5.6%
Total State Taxes	$81,400,000	$77,760,000	-4.5%

Visitor Type

Visitor Type	April – June 2018	April – June 2019
Visitors in Paid Accommodations	64%	62%
Visitors in Non-Paid Accommodations	36%	35%
Day Trippers	NA	3%

Pre-Visit

Planned trip in advance	April – June 2018	April – June 2019
1 week or less	4%	6%
2-4 weeks	4%	7%
1-2 months	23%	23%
3-6 months	29%	30%
6 months or more	26%	28%
Not sure	14%	6%

Considered Other Destinations	April – June 2018	April – June 2019
Yes	17%	17%
No	83%	83%

Pre-Visit

Trip Planning Websites[1]	April – June 2018	April – June 2019
Airline websites	31%	32%
Search engines	24%	19%
Booking websites	19%	16%
Trip Advisor	20%	16%
Airbnb, VRBO, HomeAway	15%	16%
Hotel websites	19%	15%
Vacation rental websites	15%	11%
www.FortMyers-Sanibel.com	11%	7%
Visit Florida	8%	5%
Facebook	8%	5%
VCB Social Media	NA	4%
Travel reviews, blogs, stories, etc.	NA	4%
Instagram	NA	2%
YouTube, Hulu, Pandora	NA	2%
Other	10%	7%
None/Don't visit websites	21%	28%

[1]Multiple responses permitted.

Pre-Visit

Information Requests[1]	April – June 2018	April – June 2019
Call hotel/motel/condo	6%	7%
Visitor guide	4%	3%
Call VCB	1%	2%
Call local Chamber of Commerce	1%	2%
Fort Myers-Sanibel E-newsletter	2%	1%
Other	8%	5%
None/Did not request info	79%	82%

[1]Multiple responses permitted.

Pre-Visit

Recall of Lee County Promotions	April – June 2018	April – June 2019
Yes	44%	31%
No	39%	55%
Can't recall	16%	14%

Characteristics influencing decision to visit Lee County (top 2 boxes)	April – June 2018	April – June 2019
Warm weather	86%	91%
Peaceful/relaxing	85%	90%
A safe destination	75%	85%
White sandy beaches	82%	85%
Clean, unspoiled	72%	80%
Convenient location	68%	79%
Plenty to see and do	59%	77%
A "family" atmosphere	61%	75%
Value for your travel dollar	63%	75%
Reasonably priced lodging	53%	68%

Pre-Visit

Transportation	April – June 2018	April – June 2019
Fly	71%	69%
Drive a personal vehicle	24%	26%
Drive a rental vehicle	3%	2%
Drive a RV	1%	1%
Travel by bus	0%	1%
Other	1%	1%

Airport Used	April – June 2018	April – June 2019
Southwest Florida International	79%	74%
Punta Gorda	10%	11%
Miami International	3%	5%
Orlando International	2%	3%
Tampa International	3%	3%
Ft. Lauderdale International	2%	3%
Other	1%	1%

Travel Party Profile

Visitor Origin	April – June 2018	April – June 2019
Florida	9%	9%
Southeast	17%	13%
Northeast	21%	21%
Midwest	33%	36%
West	4%	5%
Canada	3%	4%
United Kingdom	2%	3%
Germany	7%	5%
Other Europe	2%	3%
Other international	2%	1%

Travel Party Profile

Visitor Origin	April – June 2018	April – June 2019
Chicago	6%	5%
New York	5%	4%
Boston	7%	4%
Minneapolis-Saint Paul	3%	4%
Tampa-St. Pete-Sarasota	5%	3%
Detroit	3%	3%
Miami-Ft. Lauderdale	3%	3%
Cleveland-Akron	4%	3%
Indianapolis	3%	2%
Milwaukee	3%	2%

Travel Party Profile

Travel Parties	April – June 2018	April – June 2019
Mean travel party size	3.5	3.2[1]
Travel with children under age 18	32%	29%

Travel Party Composition	April – June 2018	April – June 2019
Couple	37%	42%
Family	38%	37%
Group of couples/friends	13%	10%
Single	8%	9%
In a tour group	0%	<1%
With business associates	0%	<1%

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

Travel Party Profile

Marital Status	April – June 2018	April – June 2019
Married	75%	77%
Single	13%	19%
Other	12%	4%

Age	April – June 2018	April – June 2019
Average age	51	53

Household Income	April – June 2018	April – June 2019
<$50,000	11%	14%
$50,000 - $74,999	23%	22%
$75,000 - $99,999	15%	18%
$100,000 - $124,999	15%	18%
$125,000 - $149,999	10%	8%
$150,000+	26%	20%

Trip Experience

Length of Stay	April – June 2018	April – June 2019
Average nights in The Beaches of Fort Myers & Sanibel	7.2	7.4

First time/Repeat Visitors	April – June 2018	April – June 2019
First-time	19%	25%
Repeat	81%	75%

Trip Experience

Activities[1]	April – June 2018	April – June 2019
Beaches	94%	78%
Relax & unwind	75%	77%
Dining	74%	64%
Shopping	56%	42%
Visiting friends/relatives	35%	36%
Nature, environment, bird watching	24%	31%
Biking, hiking etc.	19%	20%
Attractions	20%	19%
Bars, nightlife	18%	17%
Photography	17%	16%
Fishing	13%	15%
Water sports	6%	14%
Golf or tennis	14%	10%
Special event	NA	9%
Museums, history, etc.	NA	9%
Culture	3%	8%
Guided tours	6%	6%
Sporting event	5%	4%
Spas	NA	4%
Diving/snorkeling	3%	4%
Special occasion	NA	3%
Business conference or meeting	NA	2%
Volunteering	NA	1%
Other	3%	4%

[1]Multiple responses permitted.

Trip Experience

Attractions[1]	April – June 2018	April – June 2019
Beaches	86%	75%
Fort Myers Beach Pier	45%	37%
Sanibel Lighthouse	31%	32%
Edison & Ford Winter Estates	23%	24%
Miromar Outlets Mall	27%	20%
Sanibel Outlets	26%	19%
J.N. Ding Darling National Wildlife Refuge	17%	14%
Periwinkle Place	15%	12%
Coconut Point Mall	10%	9%
Bell Tower Shops	12%	8%
Shell Factory and Nature Park	7%	8%
Gulf Coast Town Center	9%	6%
Manatee Park	4%	5%
Broadway Palm Dinner Theater	2%	3%
Bailey-Matthews Shell Museum	2%	3%
Barbara B. Mann Performing Arts Hall	1%	2%
Other	5%	5%
None	7%	14%

[1]Multiple responses permitted.

Trip Experience

Area stayed	April – June 2018	April – June 2019
Sanibel Island	27%	23%
Fort Myers	17%	20%
Fort Myers Beach	22%	20%
Cape Coral	13%	16%
Bonita Springs	4%	5%
Captiva Island	2%	3%
North Fort Myers	3%	2%
Other	6%	7%
None/not staying overnight	6%	3%

Post-Trip Evaluation

Loyalty metrics	April – June 2018	April – June 2019
Likely to recommend	91%	93%
Likely to return	90%	91%
Likely to return next year	53%	66%

Satisfaction with Accommodations	April – June 2018	April – June 2019
Exceeded expectations	43%	41%
Met expectations	54%	56%
Did not meet expectations	3%	3%

Post-Trip Evaluation

Satisfaction with Visit	April – June 2018	April – June 2019
Very satisfied	58%	72%
Satisfied	36%	23%
Neither	1%	2%
Dissatisfied/Very dissatisfied	1%	1%
Don't know	4%	2%

Satisfaction with Customer Service	April – June 2018	April – June 2019
Very satisfied	43%	66%
Satisfied	43%	26%
Neither	4%	3%
Dissatisfied/Very dissatisfied	1%	1%
Don't know	10%	4%

Post-Trip Evaluation

Visitor Concerns[1]	April – June 2018	April – June 2019
Traffic	24%	30%
Beach seaweed	13%	20%
Insects	14%	17%
Red Tide	13%	13%
High prices	9%	10%
Water quality	9%	10%
Weather	12%	5%
Lack of nightlife	4%	3%
Quality of accommodations	3%	2%
Other	6%	5%
Nothing	35%	30%

[1]Multiple responses permitted.

Methodology

Methodology

- Visitor Tracking Study
  - Internet survey[1] & in-person interviews in public areas, hotels, & at events around Lee County
  - Sample size: 1,557 completed interviews
  - Target individuals: April – June visitors to Lee County
  - Data Collection: April 2019 – June 2019

- Occupancy Study
  - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc.
  - Sample Size – 81 completed interviews
  - Data Collection: July 2019 (for April – June 2019)

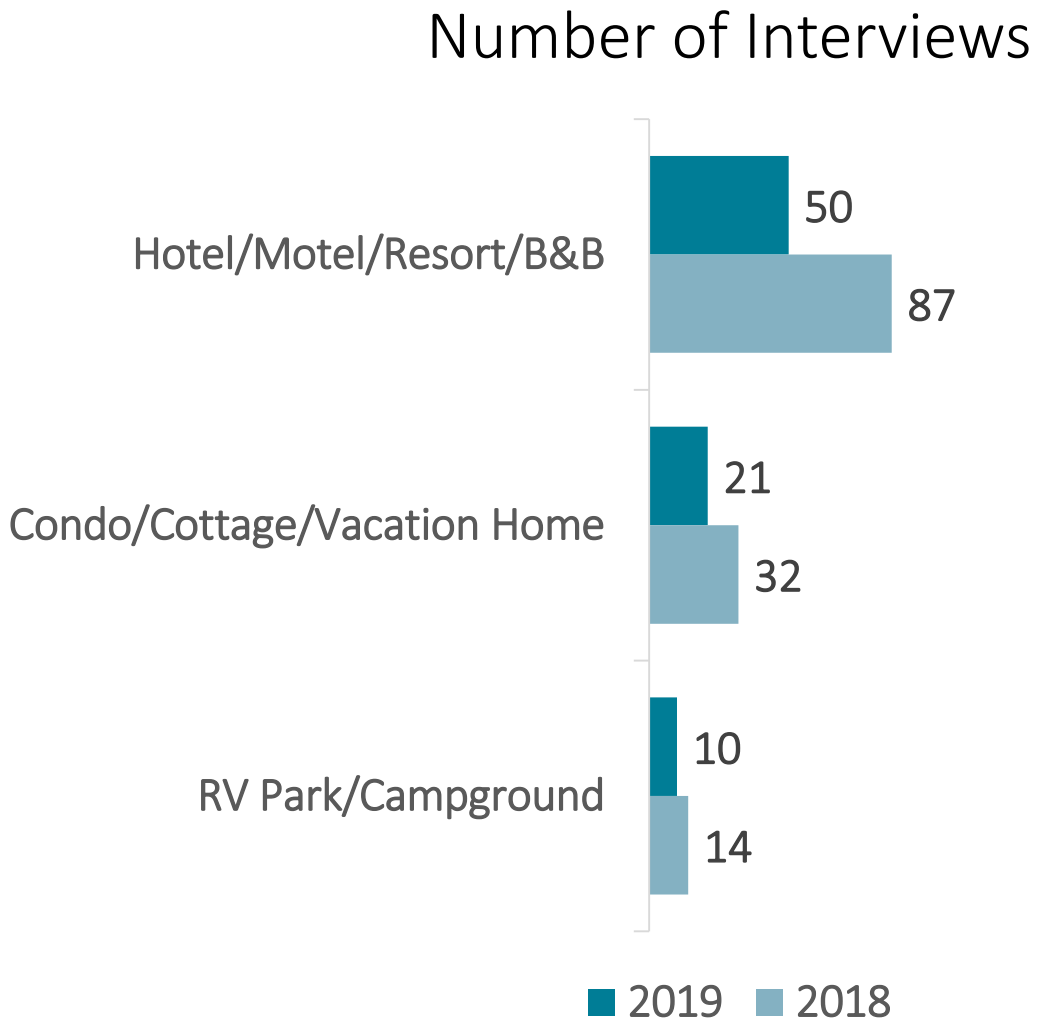
[1]186 internet surveys were completed by visitors to Sanibel Moorings Resort, Sundial Beach Resort & Spa, and Tarpon Lodge.

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: 1,557 completed interviews
    - Target individuals: April – June visitors to Lee County
    - Data Collection: April 2019 – June 2019
  - Occupancy Study
    - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc.
    - Sample Size – 81 completed interviews
    - Data Collection: July 2019 (for April – June 2019)
  - 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 – 81 completed interviews
  - Data Collection: July 2019 (for April – June 2019)



Methodology

- **1,557** visitor interviews were completed in the following areas:

The Beaches of Fort Myers & Sanibel

Lee County VCB

April – June 2019

Visitor Tracking & Occupancy Study

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THE BEACHES OF FORT MYERS AND SANIBEL

downs & st. germain RESEARCH