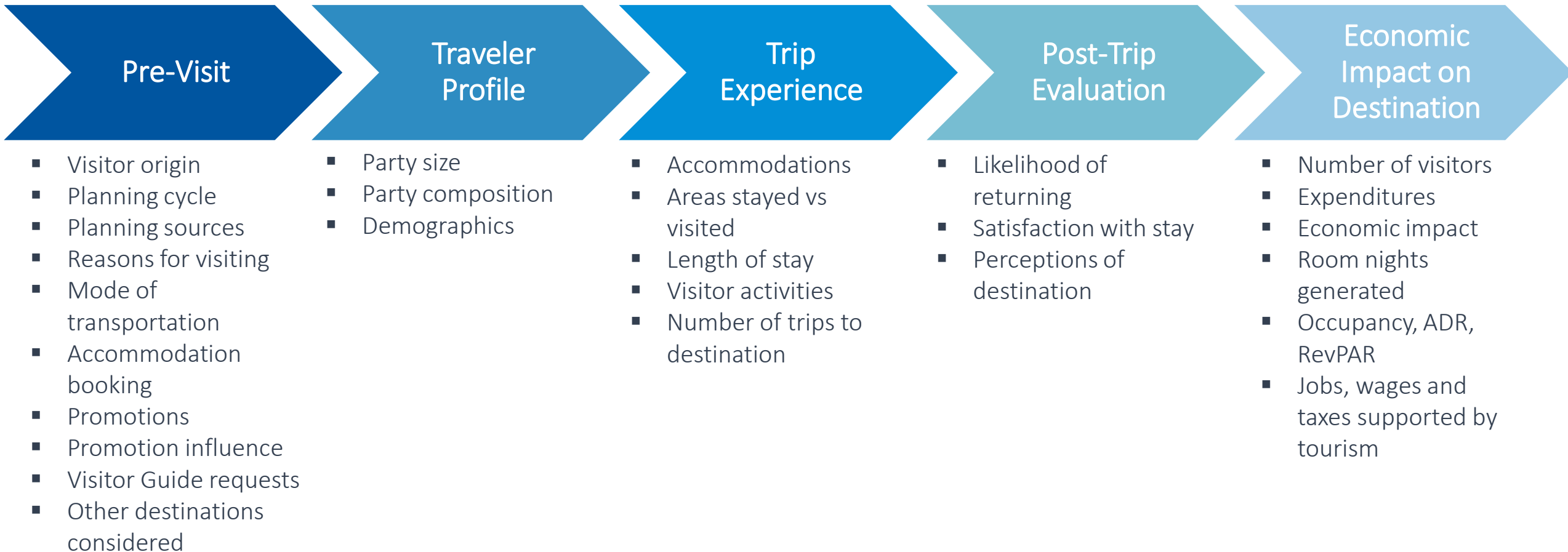


Punta Gorda/Englewood Beach VCB Economic Impact & Visitor Tracking Report FY 2019

October 2018 – September 2019



Study Objectives: Visitor Journey



Visitor Tracking Study

- Interviews were completed in person and online with 2,463 visitors at local parks, the airport and events between October 1st 2018 and September 30th 2019.



Economic Impact Study

- Economic impact of tourism for Punta Gorda/Englewood Beach VCB was based on data from the following sources:
 - 2,463 interviews conducted by Downs & St. Germain Research with visitors to Charlotte County
 - Twelve (12) monthly STR Reports
 - Downs & St. Germain Research's tourism database
 - Various government agencies and data sources
 - IMPLAN Online Economic Impact Modeling software
 - TDT Collections provided by Charlotte County

Executive Summary



Visitor Journey: Economic Impact



Visitors

Charlotte County attracted

656,200

visitors in FY 2019



Tourism Matters to Charlotte County

Visitor spending in FY 2019 generated
a total economic impact of

\$619,631,800

in Charlotte County



Direct Spending

Visitors who traveled to Charlotte
County in FY 2019 spent

\$427,332,300

in Charlotte County on
accommodations, restaurants,
groceries, transportation, attractions,
entertainment, and shopping



Room Nights

Charlotte County visitors generated

1,089,549

room nights in paid
accommodations in FY 2019



Jobs & Wages

Tourism in Charlotte County
supported

7,620

local jobs in FY 2019 , generating

\$162,511,000

in wages and salaries



Visitors Create Jobs

An additional Charlotte
County job is supported by
every

86

visitors



Tourism Development Tax

Paid accommodations and vacation rentals by visitors to Charlotte County in FY 2019 resulted in

\$4,302,554*

in TDT collected



Household Savings

Visitors to Charlotte County
save local residents

\$705

per household in taxes
every year



Marketing Spending

Every dollar spent by Punta Gorda/Englewood beach VCB on marketing is associated with

\$298

in visitor spending within
Charlotte County

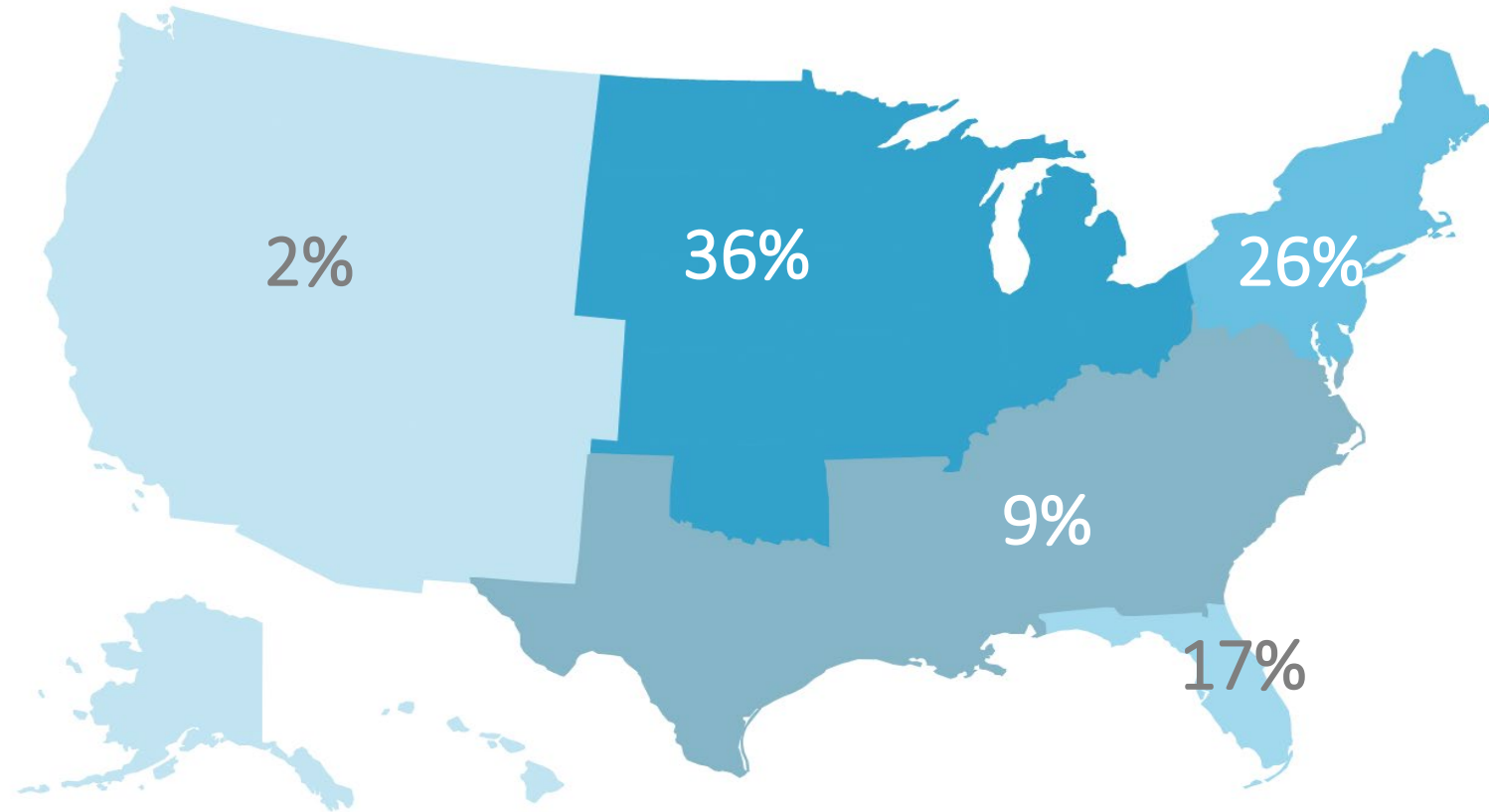


Visitor Journey: Pre-Visit



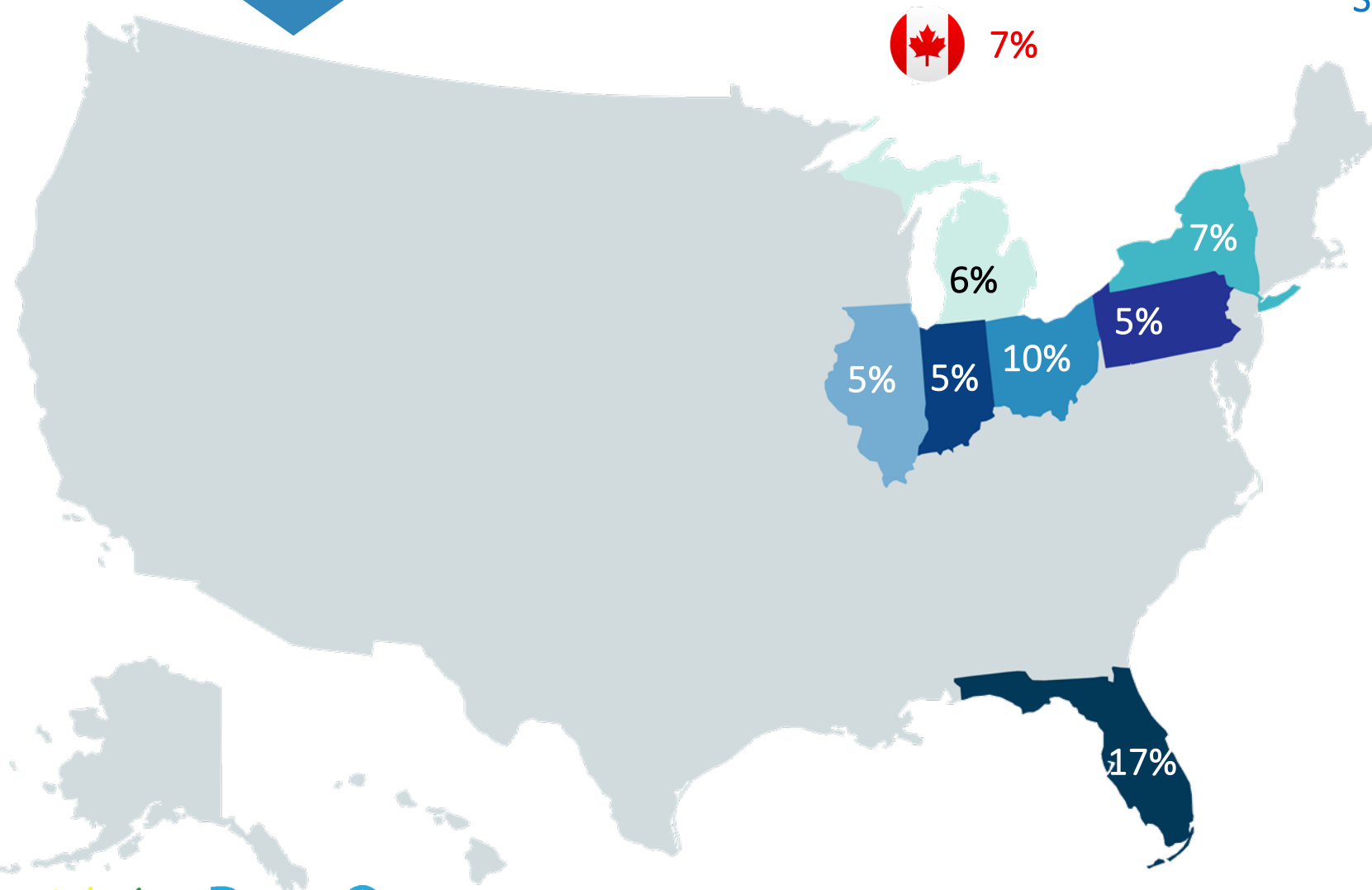
Origin of Visitors

- 90% of Charlotte County visitors lived in the United States.
- 7% of visitors to Charlotte County were from Canada.



Origin of Visitors

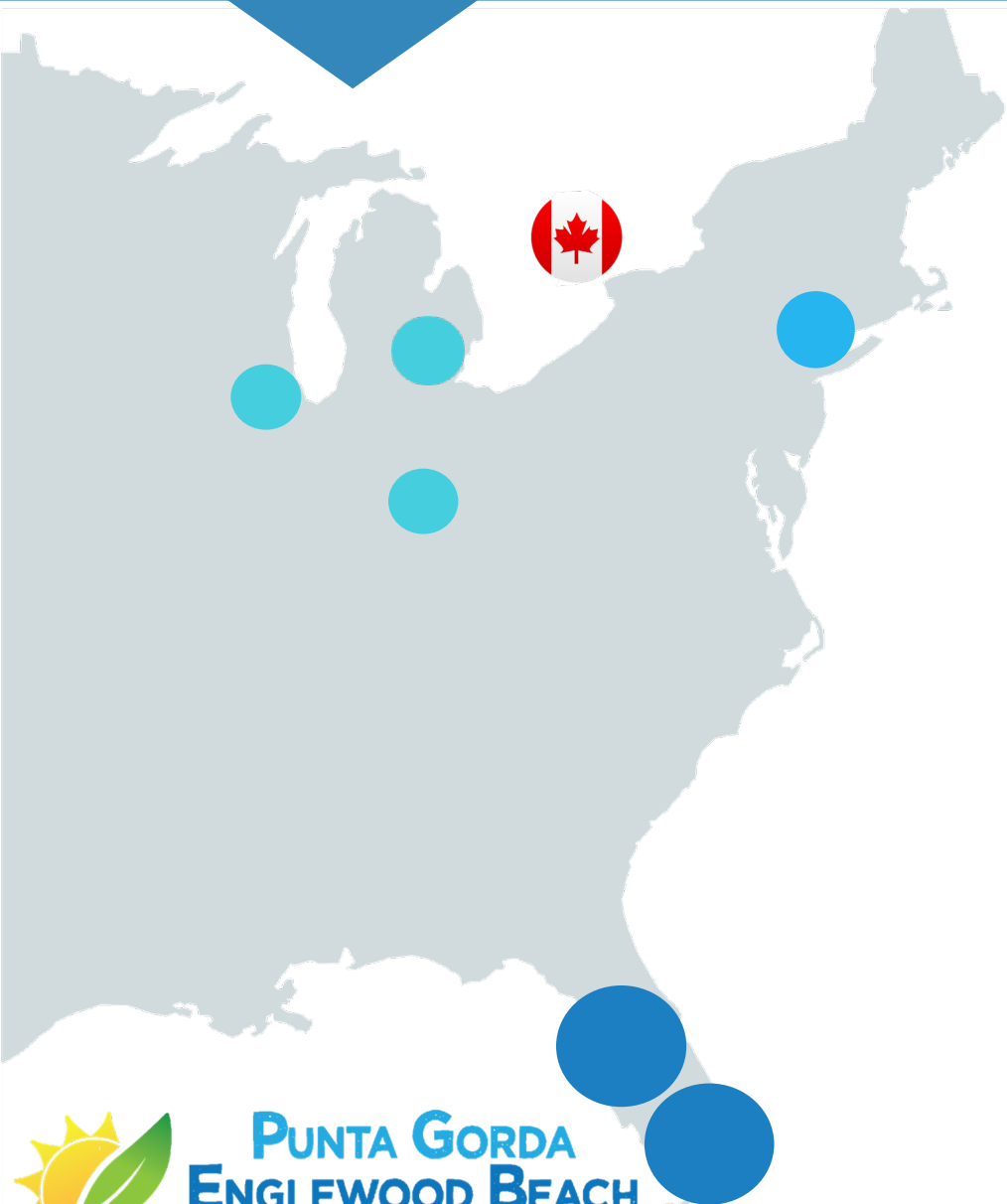
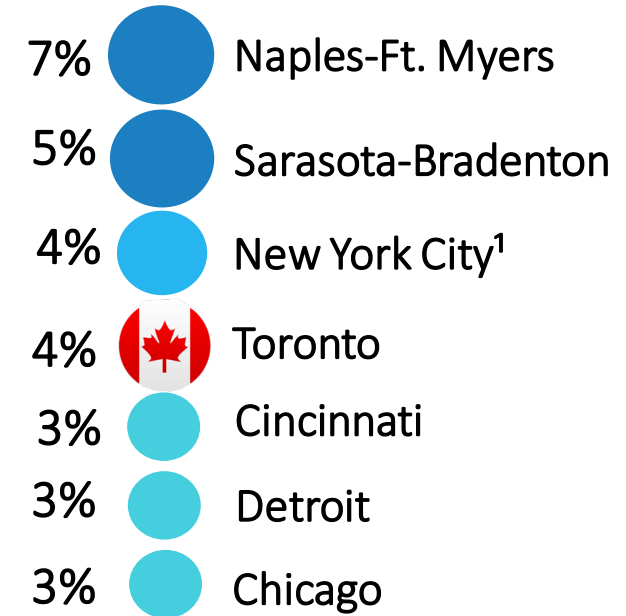
3 in 5 visitors come from 7 states and Canada



- Florida
- Ohio
- New York
- Canada
- Michigan
- Indiana
- Illinois
- Pennsylvania

Origin of Visitors

1 in 4 visitors comes from 6 markets



¹NYC metro area includes parts of New Jersey & Connecticut.

Trip Planning

- 2 in 5 visitors planned their trip 1 month or less in advance
- Top trip planning sources:



Previous visit (56%)



Friend, coworker, etc. (24%)



Internet (19%)

Top Reasons for Visiting¹

Visit friends/relatives (34%)



Relax & unwind (27%)



Family vacation (25%)



Beach (23%)



¹Multiple responses permitted

Transportation



56% of visitors drove to
Punta Gorda/Englewood Beach



16% of all visitors flew in via
the Punta Gorda Airport



15% of all visitors flew in via
the Southwest Florida
International Airport

Accommodation Booking¹



38% Directly with hotel/condo



28% Online travel agency



10% Airbnb



8% VRBO, HomeAway



5% Vacation Rental Company

¹Visitors staying in paid accommodations.

Punta Gorda/Englewood Beach Promotions

- 26% of visitors recalled promotions about the Punta Gorda/Englewood Beach area before their visit
- 50% of those who recalled advertising were influenced to come to the area
- Top sources of noticed promotions:



Newspaper (32%)



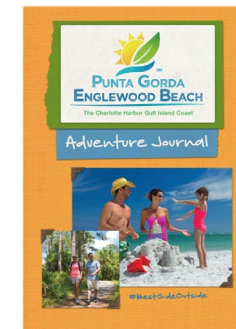
Television (30%)



Online article (17%)



Personal social media (17%)

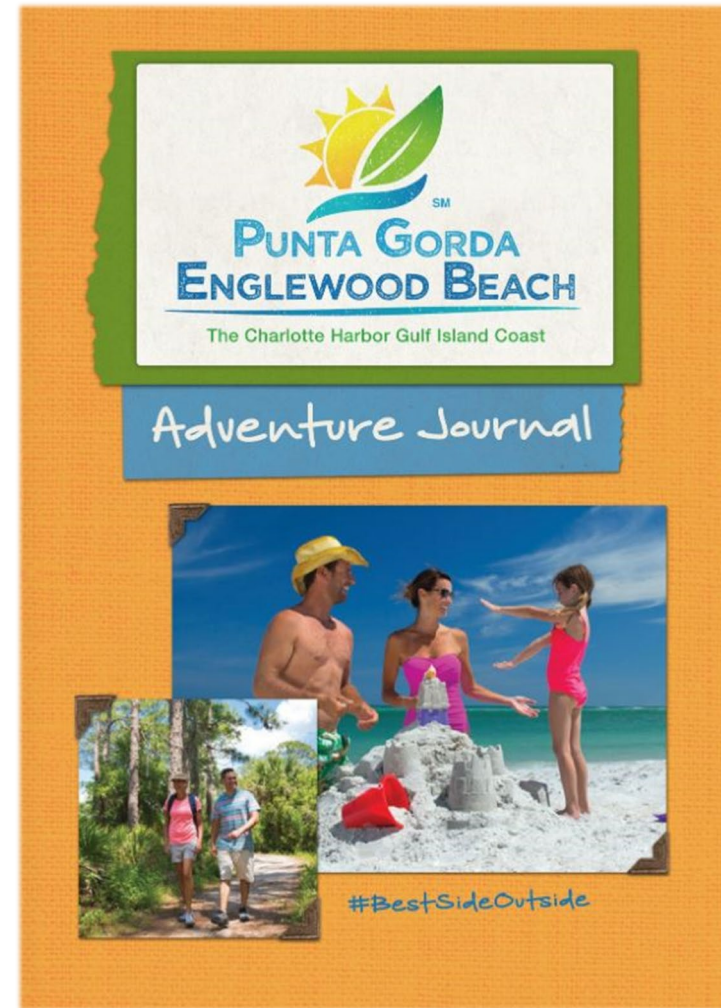


Travel/Visitor Guides (17%)

Visitors Guide

- 7% of visitors requested a Visitors Guide
- Visitors Guide received a rating of 6.3 out of 10.0¹

¹Rated on a 10 point scale where 10 is extremely useful and 1 is not at all useful.



Other Destinations Considered

- 66% of visitors considered visiting only Punta Gorda/Englewood Beach when planning their trip
- Other destinations considered:



Ft. Myers/Cape Coral (12%)



Sarasota (10%)



Naples (6%)



Orlando (5%)

Visitor Journey: Traveler Profile



Travel Party Size and Composition

- The typical visitor traveled in a party composed of 2.4 people.
- 20% traveled with at least one person under the age of 20.
- Over 2 in 5 visitors traveled as a couple, while over 1 in 4 traveled as a family.



Typical Punta Gorda/Englewood Beach Visitor

→The typical Visitor:

→Was 57 years old

→Had a median household income of
\$77,500

→Was equally likely to be male or female
(50%)

→Was from:

→Midwest (36%)

→Northeast (26%)



Typical Day Trip Visitor



→The typical Day Trip Visitor:

→Was 55 years old

→Had a median household income of
\$69,900

→Was female (56%)

→Was from:

→ Naples-Ft. Myers (26%)

→ Sarasota-Bradenton (17%)

Typical Vacationer Visitor

→The typical Vacationer¹ Visitor:

- Was 52 years old
- Had a median household income of \$82,100
- Was female (51%)
- Stayed in Punta Gorda/Englewood Beach for 5.5 nights
- 27% traveled with children
- Was from:
 - Midwest (38%)
 - Northeast (31%)

¹Travel parties who stayed 1-10 nights.



Typical Long-Term Visitor

→ The typical Long-Term¹ Visitor:

→ Was 65 years old

→ Had a median household income of
\$86,500

→ Was male (57%)

→ Stayed in Punta Gorda/Englewood Beach
for 25.0 nights

→ Was from

→ Midwest (38%)

→ Northeast (31%)

→ International (20%)

¹Travel parties who stayed more than 10 nights.

First Time Visitors

- 24% were first time visitors
- 17% had visited more than 10 times



Visitor Journey: Trip Experience



Overnight Visitors' Accommodations



32% Family/friend's residence



24% Day tripper



14% Hotel/motel/resort



16% Personal condo/timeshare



10% Rental house/condominium

Length of Stay – All Visitors

→ Visitors spent 10.2¹ nights in Punta Gorda/Englewood Beach



¹Nights stayed capped at 30 nights. Average length of stay is 22.5 nights when nights stayed is not capped.

Top Activities During Visit¹

Restaurants
(62%)



Beach
(59%)



Relax & unwind
(44%)



Visit friends/relatives
(37%)

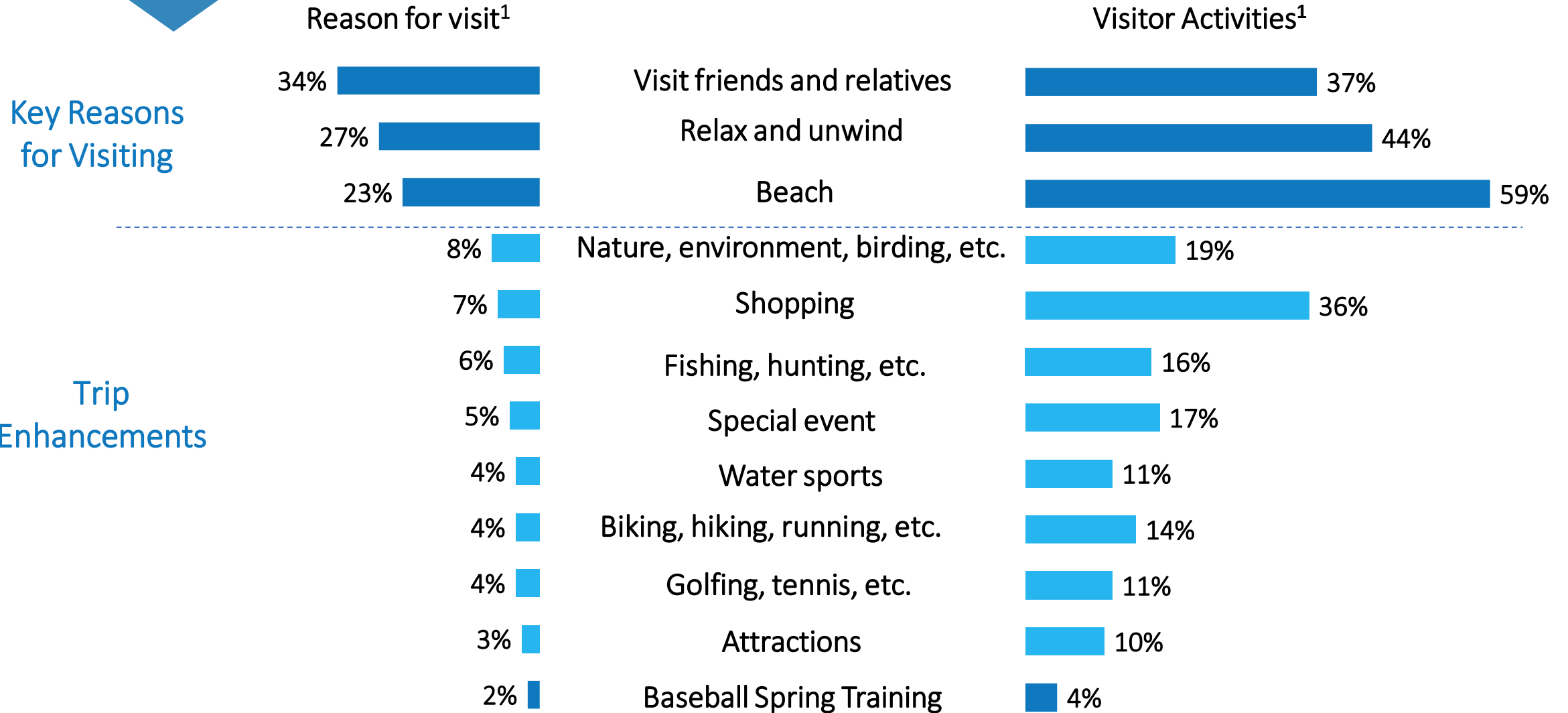


Shopping
(36%)



¹Multiple responses permitted

Reason for Visit vs. Visitor Activities



Visitor Journey: Post-trip Evaluation



Visitor Satisfaction

- 94% of visitors would recommend Punta Gorda/Englewood Beach
- 96% will return
- 94% were satisfied or very satisfied with their stay



Detailed Findings



PUNTA GORDA
ENGLEWOOD BEACH

The Charlotte Harbor Gulf Island Coast



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Visitor Journey: Economic Impact



Economic Impact

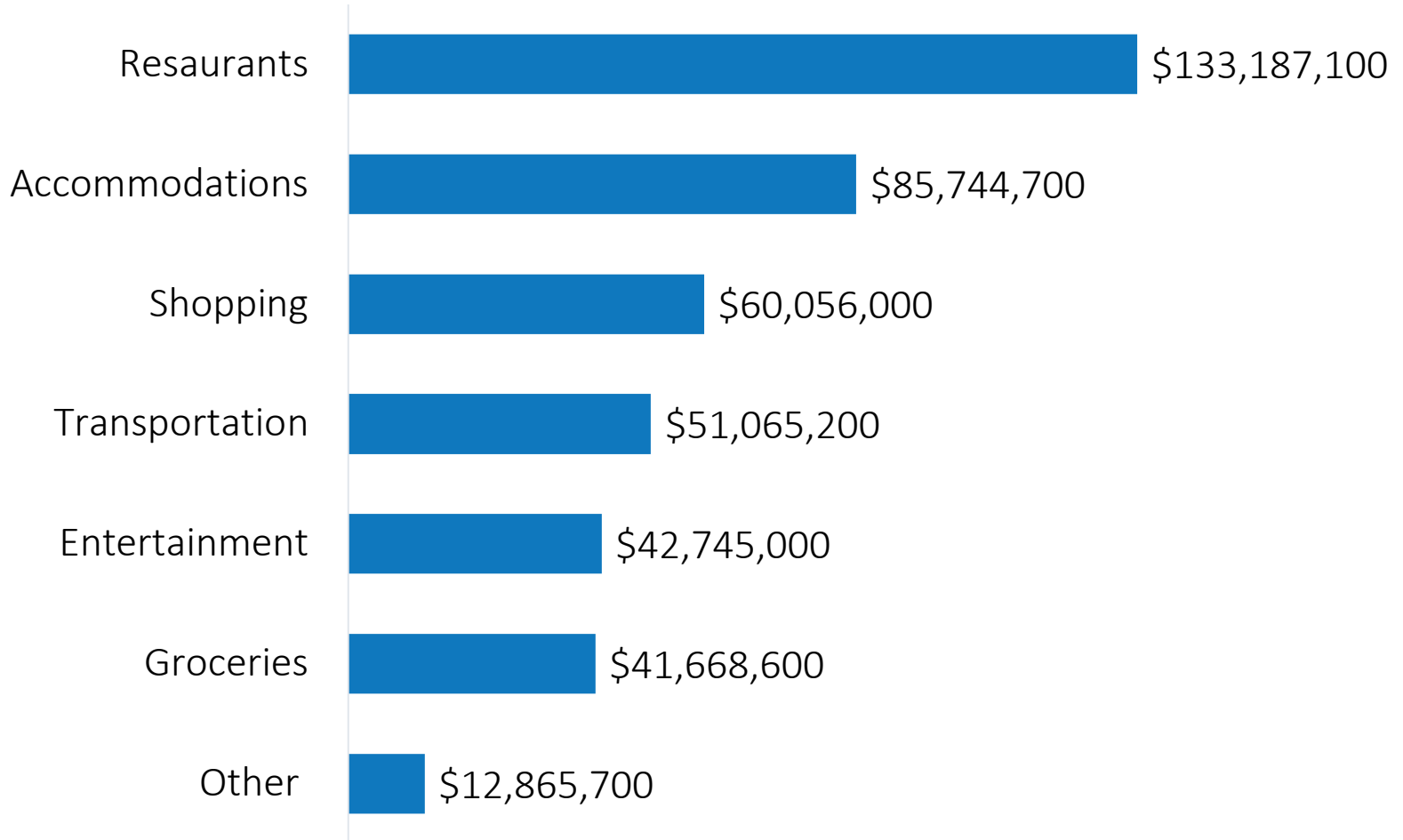
	FY2019
Total Economic Impact	\$619,631,800
Direct Spending	\$427,332,300
Room Nights Generated	1,089,549
Average Daily Rate	\$128.72
Occupancy	54.5%
Revenue per Available Room	\$70.16

Key Measures

	FY2019
Total Visitors	656,200
Jobs Supported	7,620
Wages Generated	\$162,511,000
Total Taxes Paid	\$52,809,100
TDT Collected	\$4,302,554*

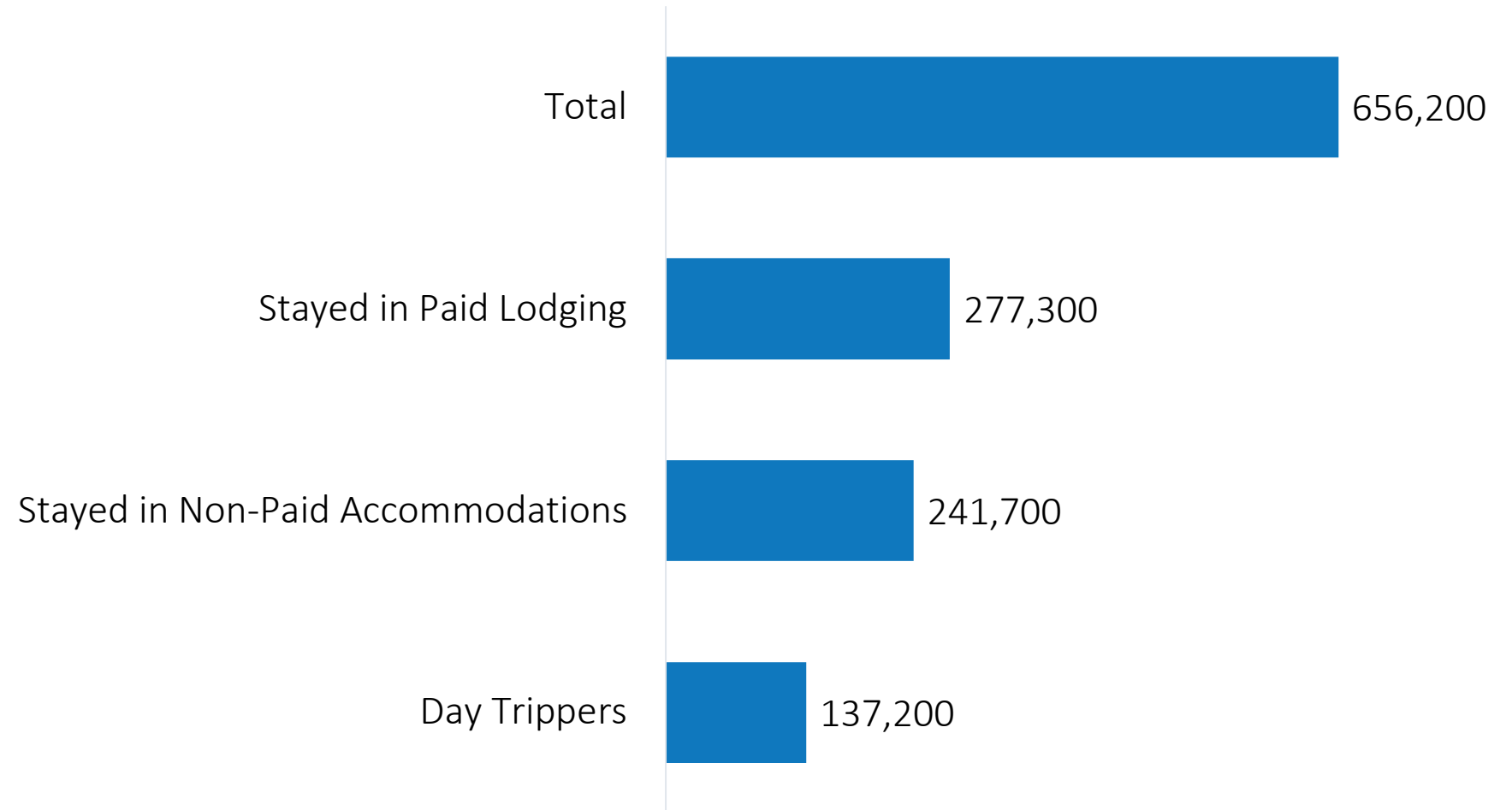
Visitors Spending by Category

→ Punta Gorda/Englewood
Beach visitors spent
\$427,332,300 in
Charlotte County in
FY2019

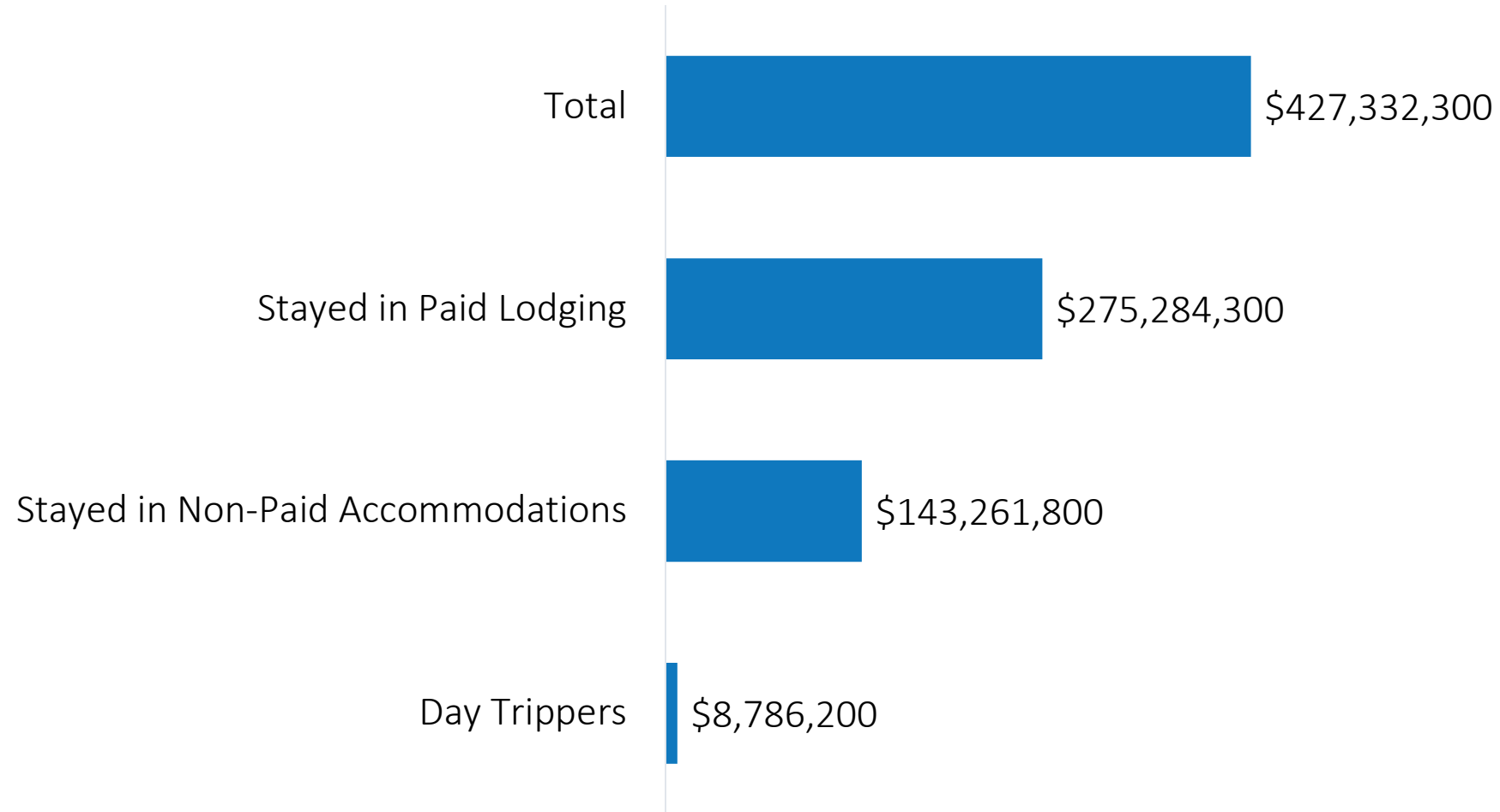


Traveler type

→ Punta Gorda/Englewood Beach attracted **656,200** visitors to Charlotte County in FY2019



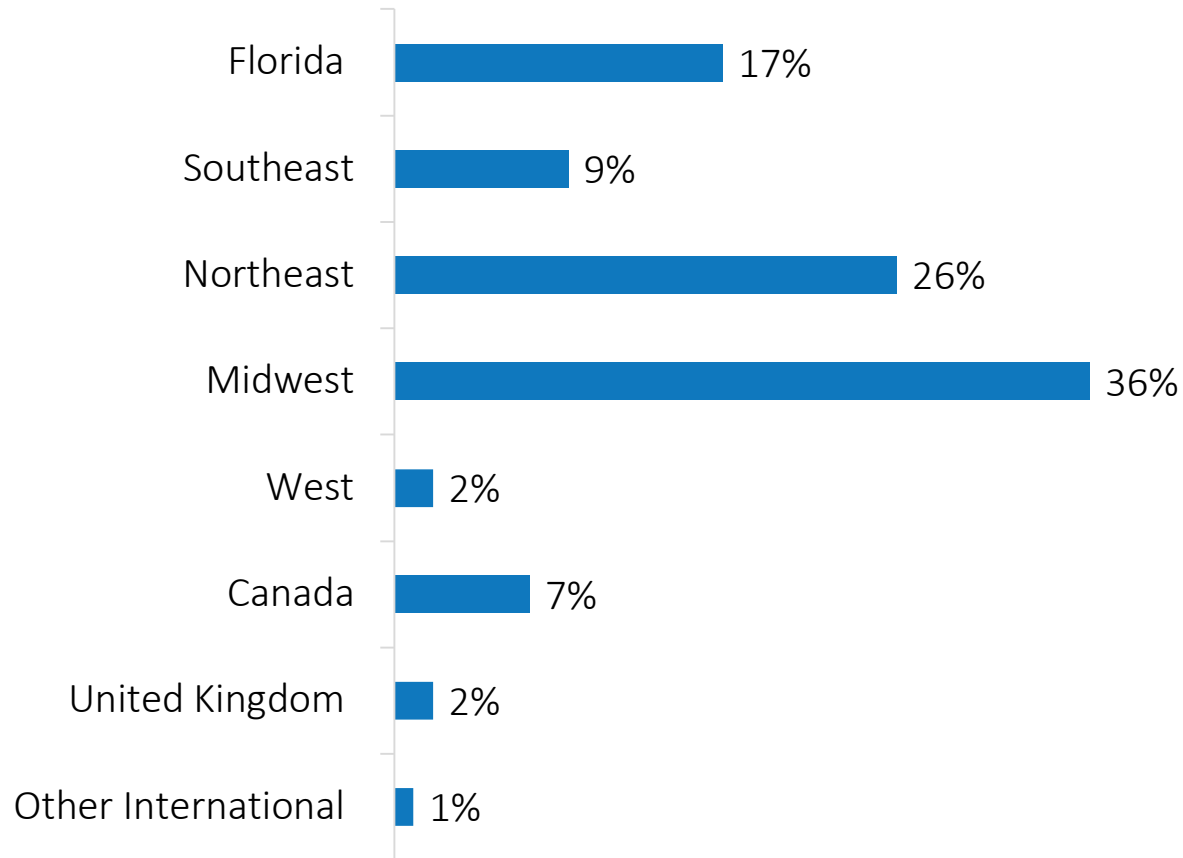
Direct Spending by traveler type



Visitor Journey: Pre-Visit

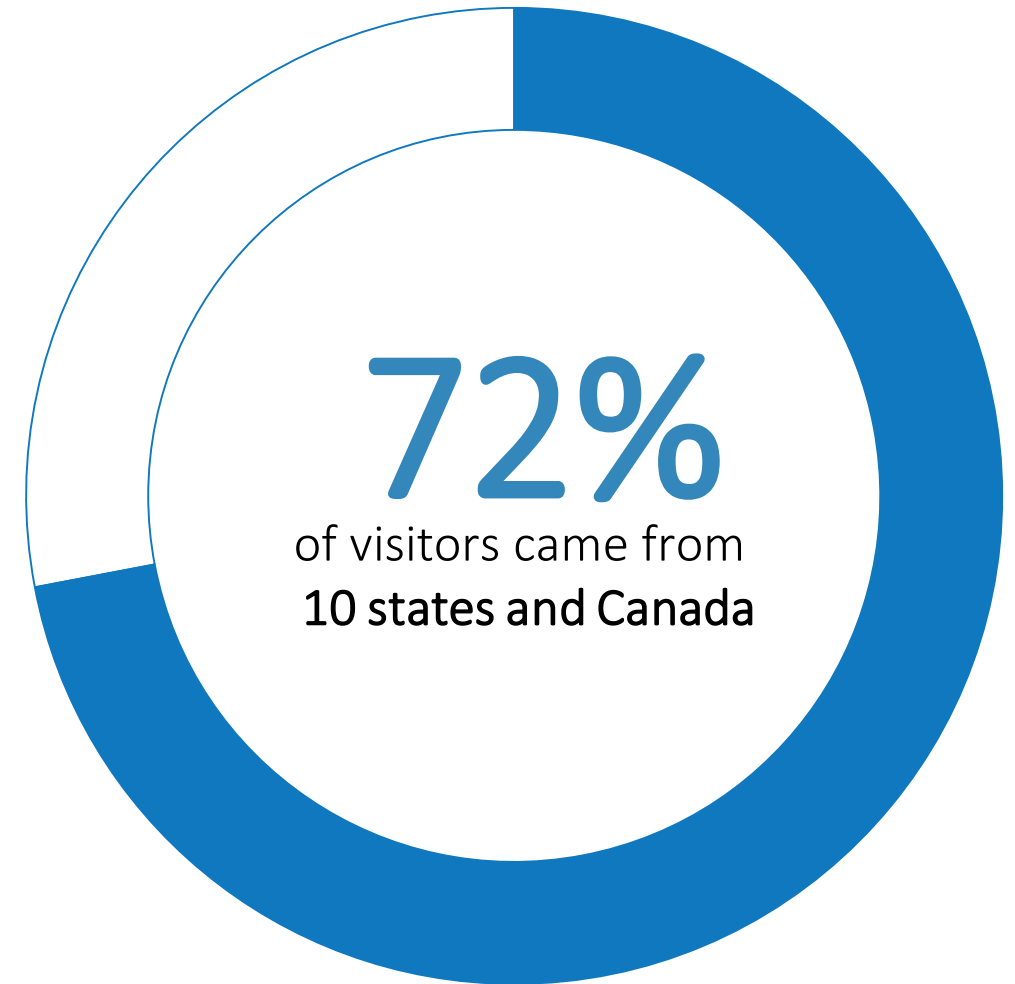


Origin of Visitors



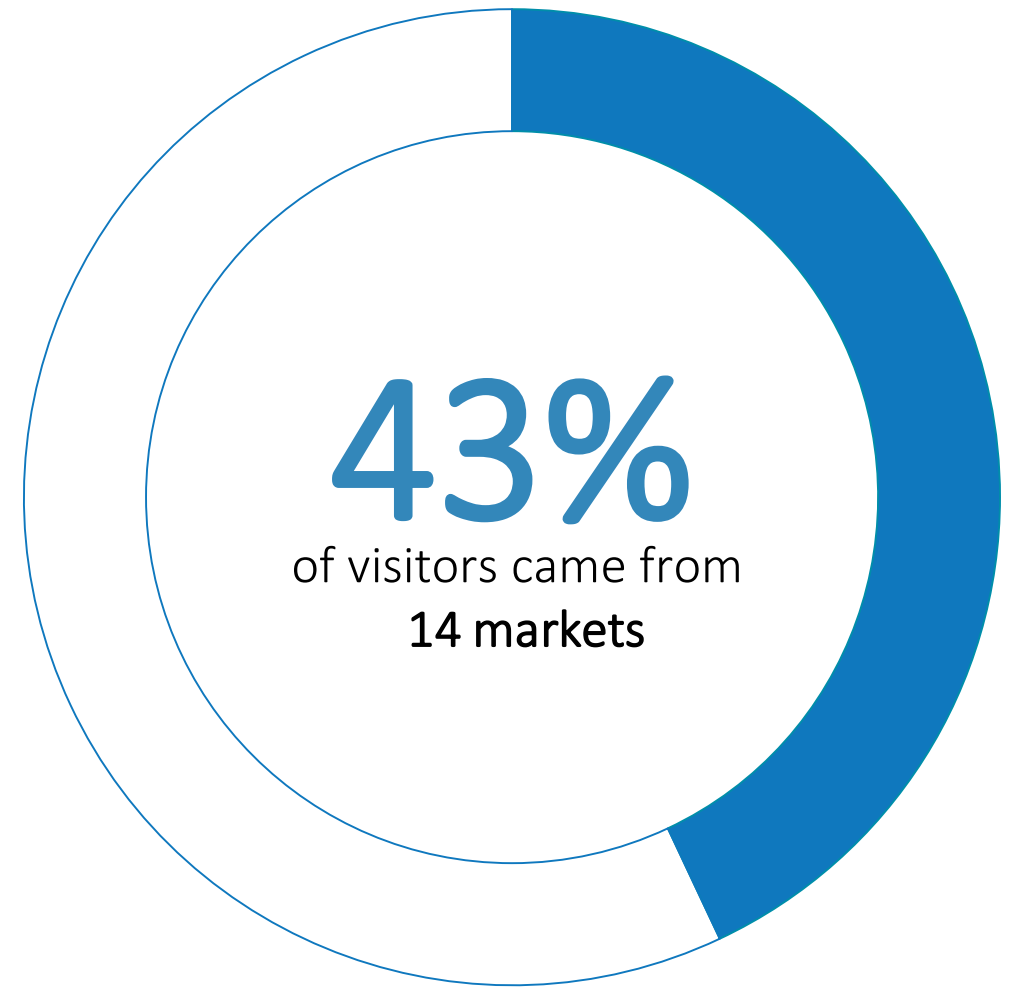
Origin of Visitors

Origin	Percentage of Visitors
Florida	17%
Ohio	10%
New York	7%
Canada	7%
Michigan	6%
Pennsylvania	5%
Illinois	5%
Indiana	5%
Massachusetts	4%
North Carolina	3%
Wisconsin	3%



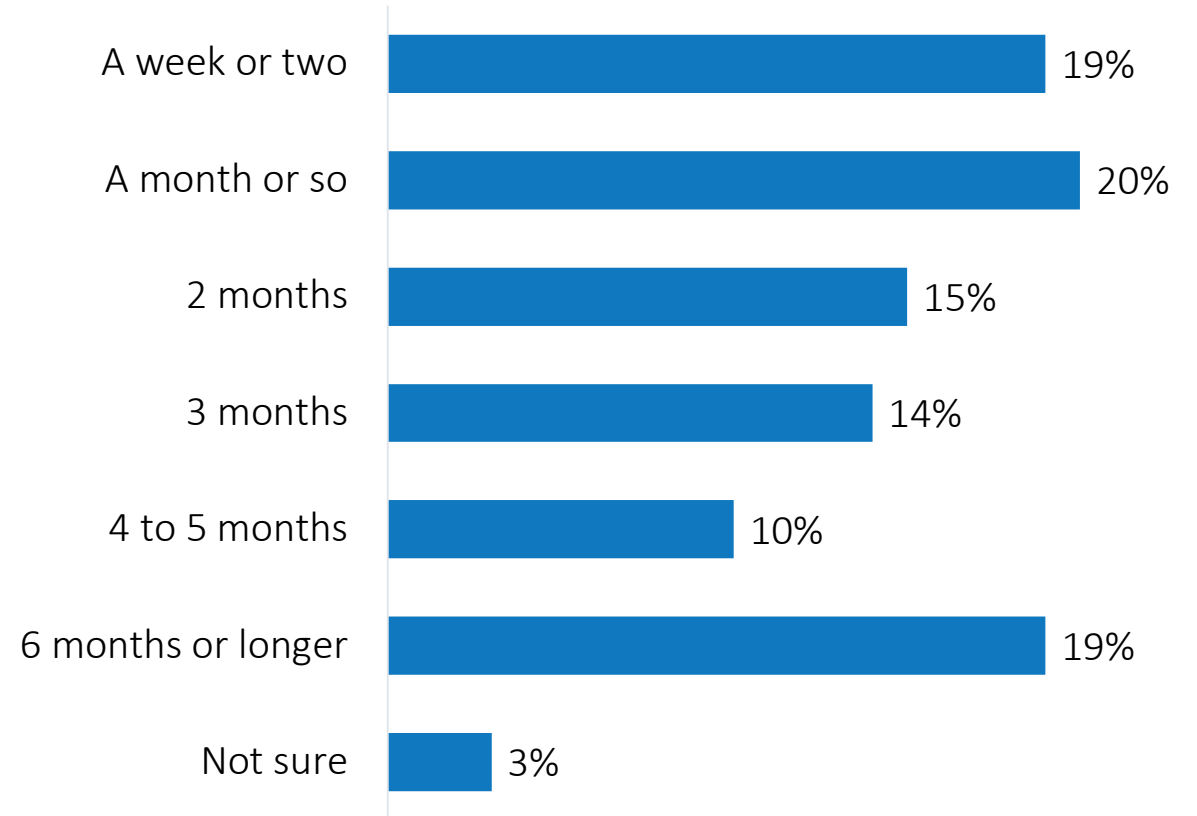
Origin of Visitors

Market	% of Visitors
Naples-Ft. Myers	7%
Sarasota-Bradenton	5%
New York City	4%
Toronto	4%
Cincinnati	3%
Detroit	3%
Chicago	3%
Boston	2%
Columbus, OH	2%
Philadelphia	2%
Grand Rapids	2%
Washington DC-Baltimore	2%
St. Louis	2%
Pittsburgh	2%



Trip Planning Cycle

→ **2 in 5** visitors planned their trip 1 month or less in advance

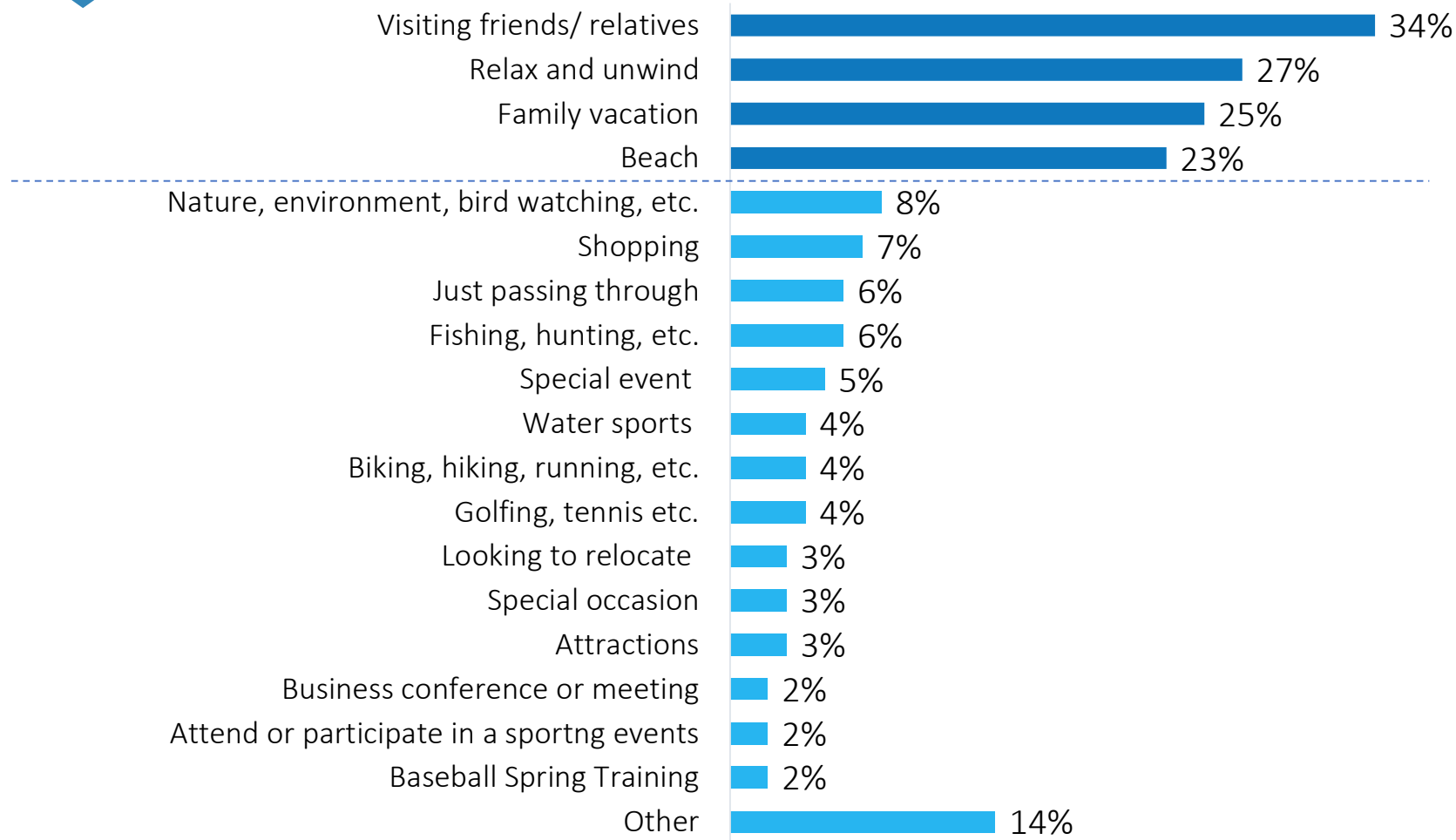


Trip Planning Sources¹

Trip Planning Source	
Previous visit	56%
Friend, co-worker, etc.	24%
Internet	19%
○ Social Networks	6%
○ Facebook	5%
○ Instagram	1%
○ Restaurant websites/apps	6%
○ Punta Gorda/Englewood Beach/Port Charlotte website	4%
Brochures/travel guides/visitor guides	5%
Special Event	3%
Newspapers	3%
Television	2%
AAA	2%
Other	7%
None/don't know	9%

¹Multiple responses permitted.

Reasons for Visiting¹

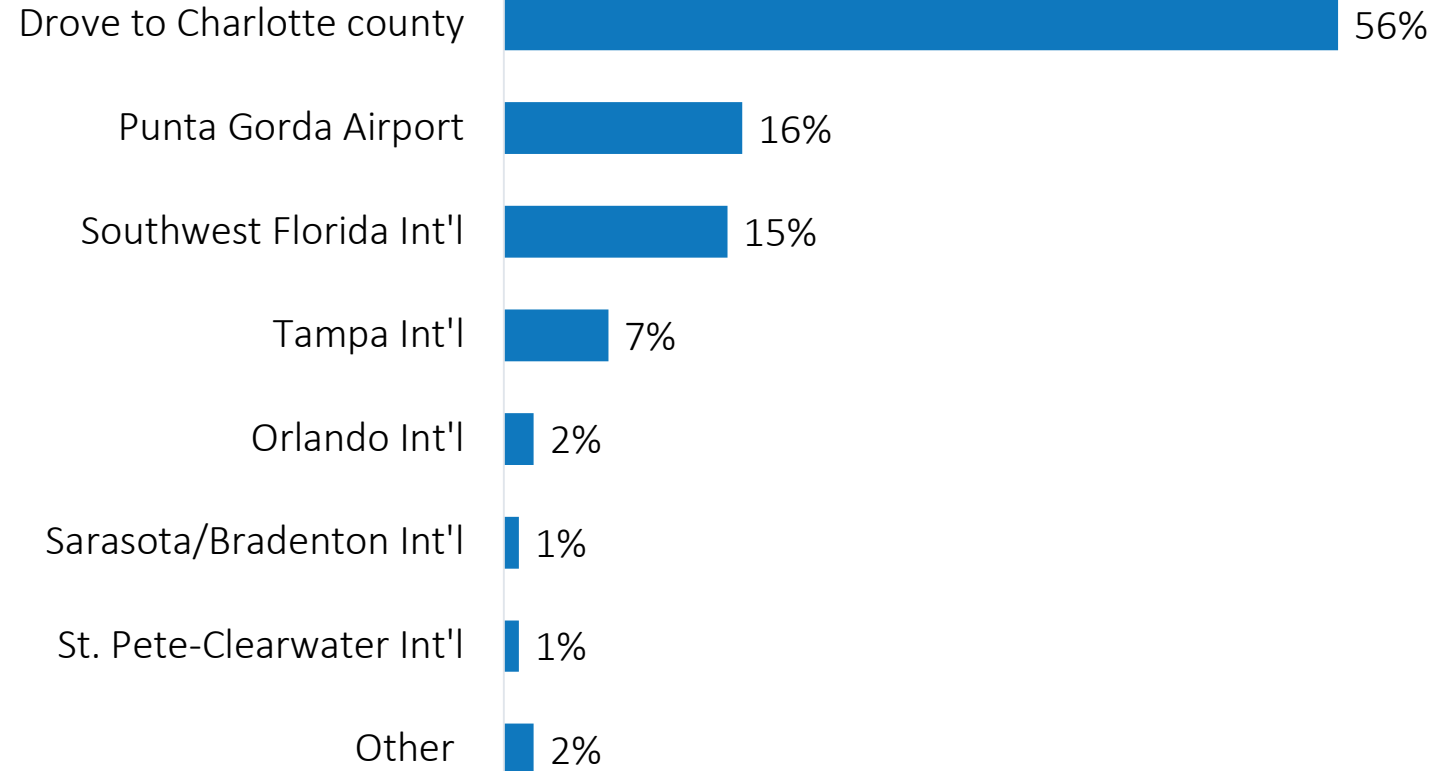


¹Multiple responses permitted.

Visitor Transportation

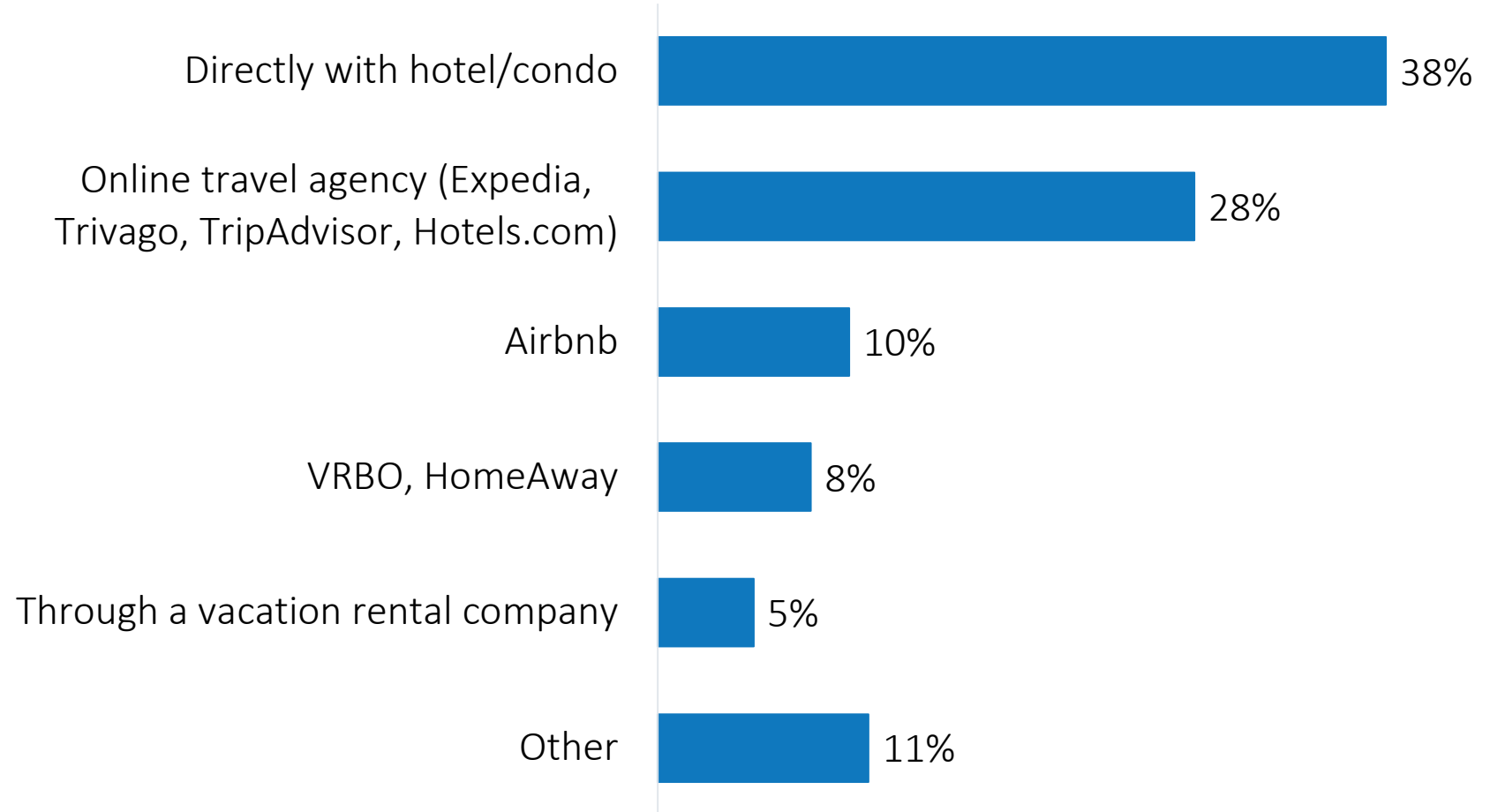
→ Around half of visitors **drove** to Punta Gorda/Englewood Beach (**56%**)

→ **44%** who flew mostly used PGD and RSW



Accommodation Booking¹

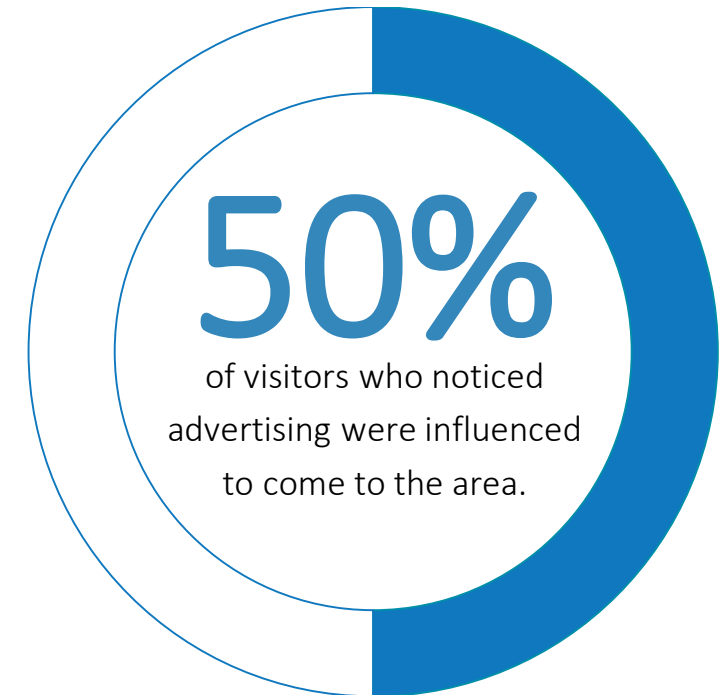
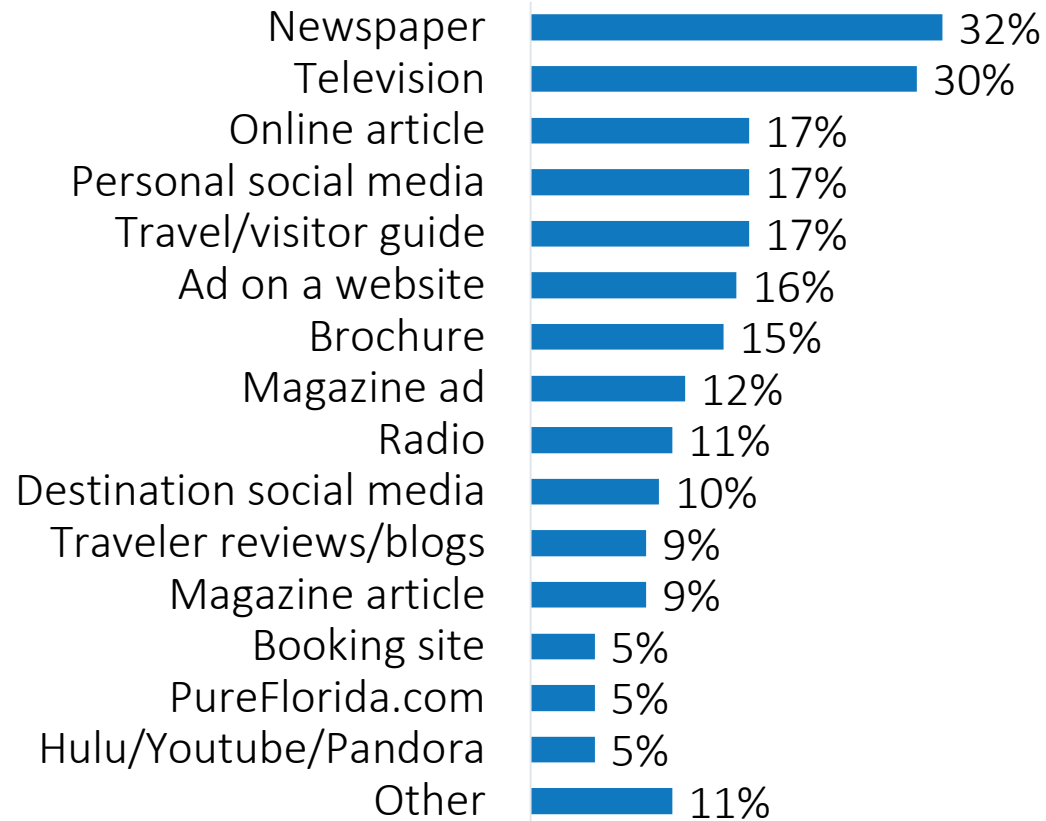
→ **Almost 2 in 5** visitors booked directly with a hotel/condo



¹Visitors staying in paid accommodations.

Punta Gorda/Englewood Beach Promotions¹

→ 26% of visitors saw, read or heard advertising, promotions or travel stories about the Punta Gorda/Englewood Beach area from the following sources:



¹Multiple responses permitted.

Punta Gorda/Englewood Beach Promotion Influences

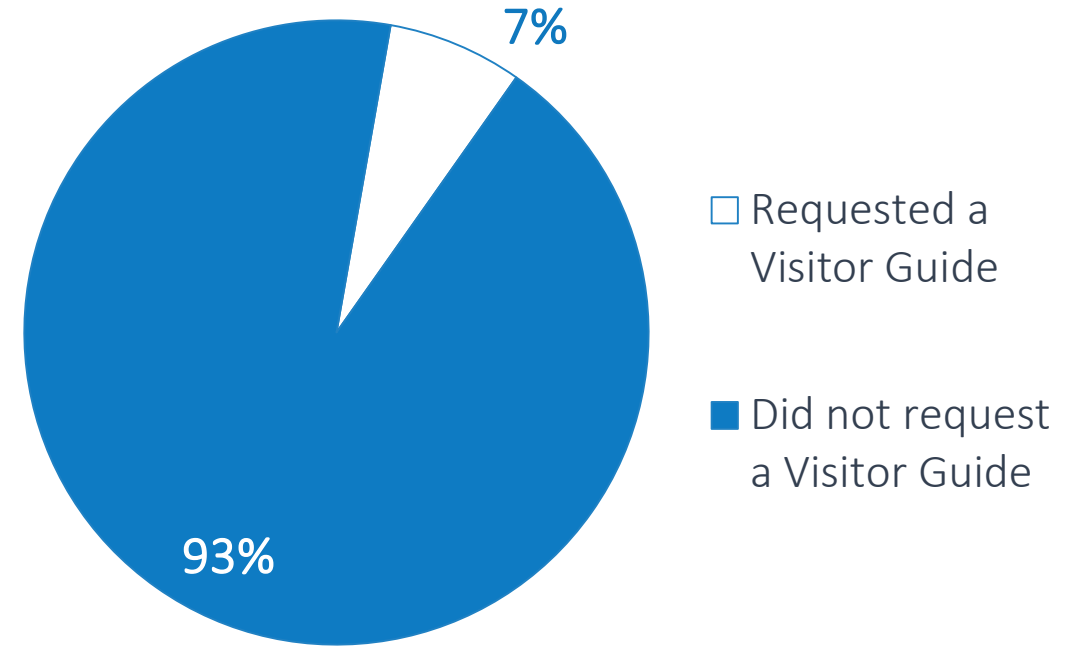
→Visitors who stayed in paid accommodations were more likely to notice information about the area than visitors who stayed in non-paid accommodations and day trippers

Saw Advertising	Paid Accommodations	Non-paid Accommodations	Day Trippers	Average Visitor
Yes	35%	23%	23%	27%
No	61%	70%	69%	67%
Don't know	4%	7%	8%	6%

Influenced by Advertising	Paid Accommodations	Non-paid Accommodations	Day Trippers	Average Visitor
Yes	68%	37%	47%	50%
No	28%	56%	51%	45%
Don't know	4%	7%	2%	5%

Visitors Guide

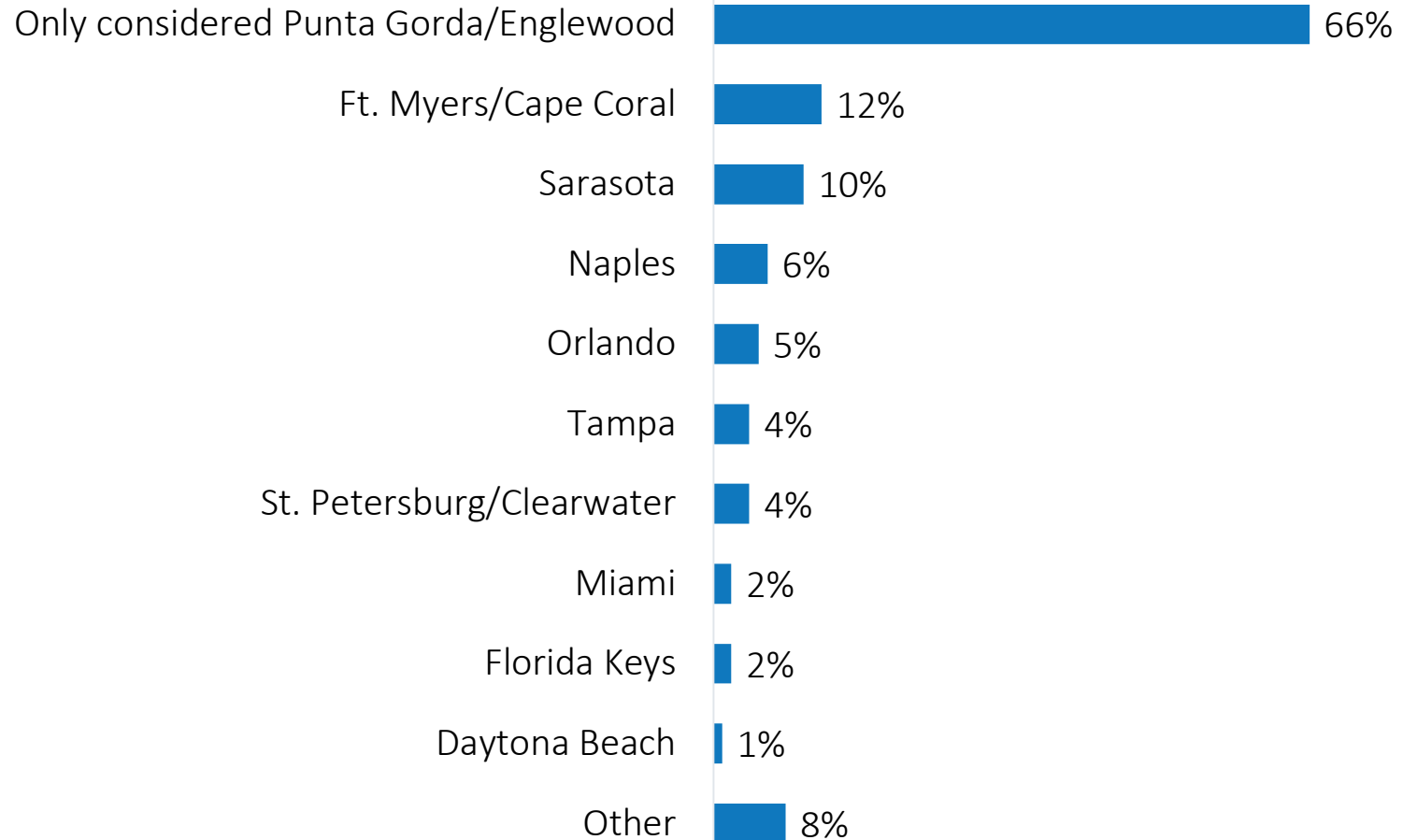
- 7% of visitors requested a Visitors Guide before their trip
 - 1% requested a print version
 - 6% requested an online version
- Visitors Guide received a rating of 6.3 out of 10.0¹



¹Rated on a 10 point scale where 10 is extremely useful and 1 is not at all useful.

Other Destinations Considered

→ **2 in 3** visitors only
considered visiting Punta
Gorda/Englewood Beach
when planning their trip



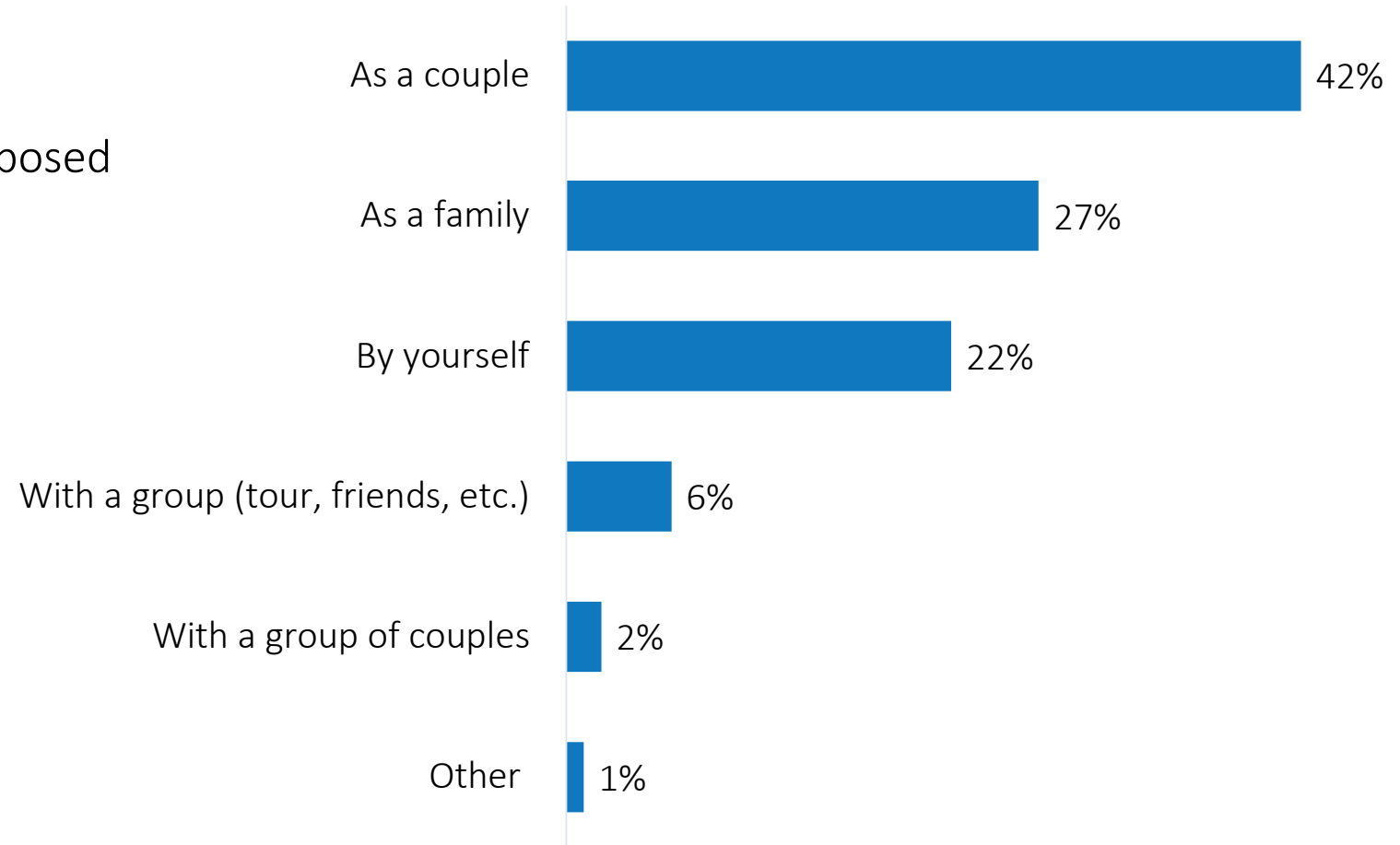
¹Multiple responses permitted.

Visitor Journey: Traveler Profile



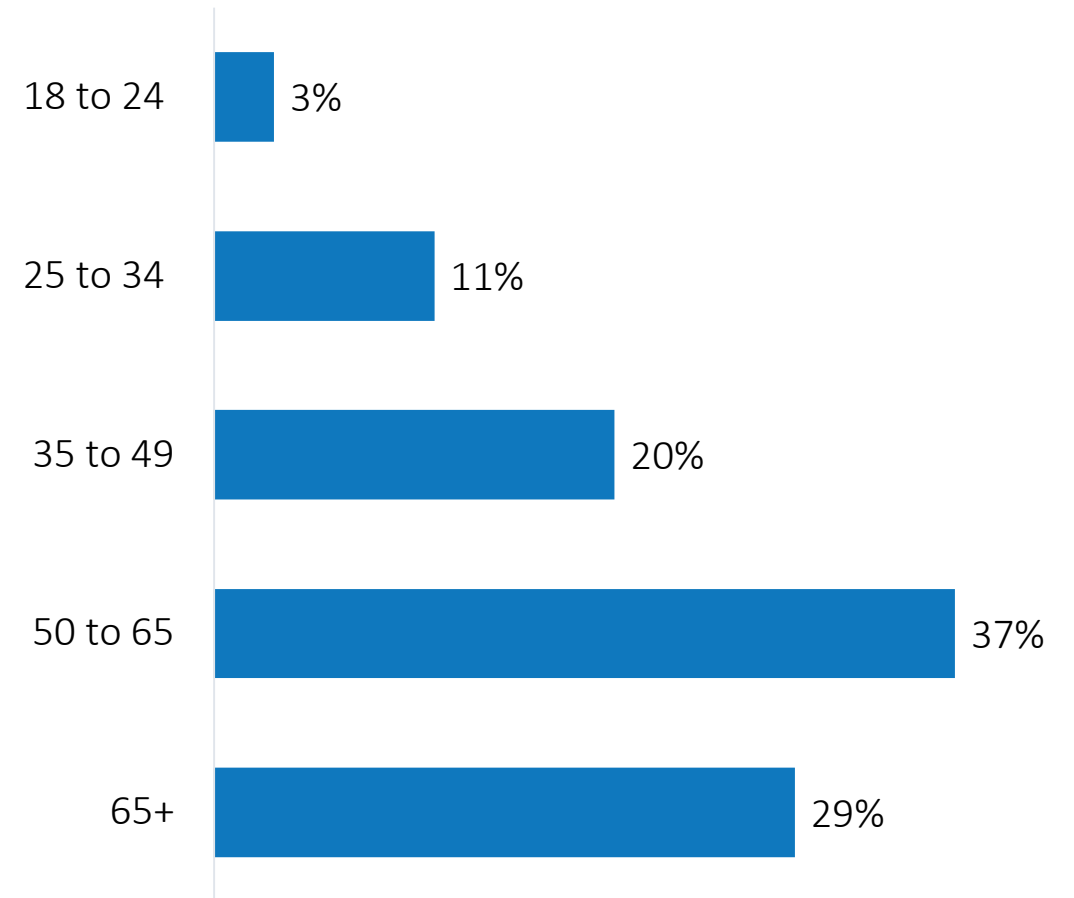
Travel Parties

- The typical visitor traveled in a party composed of **2.4** people
- **20%** traveled with children under 20



Median Age

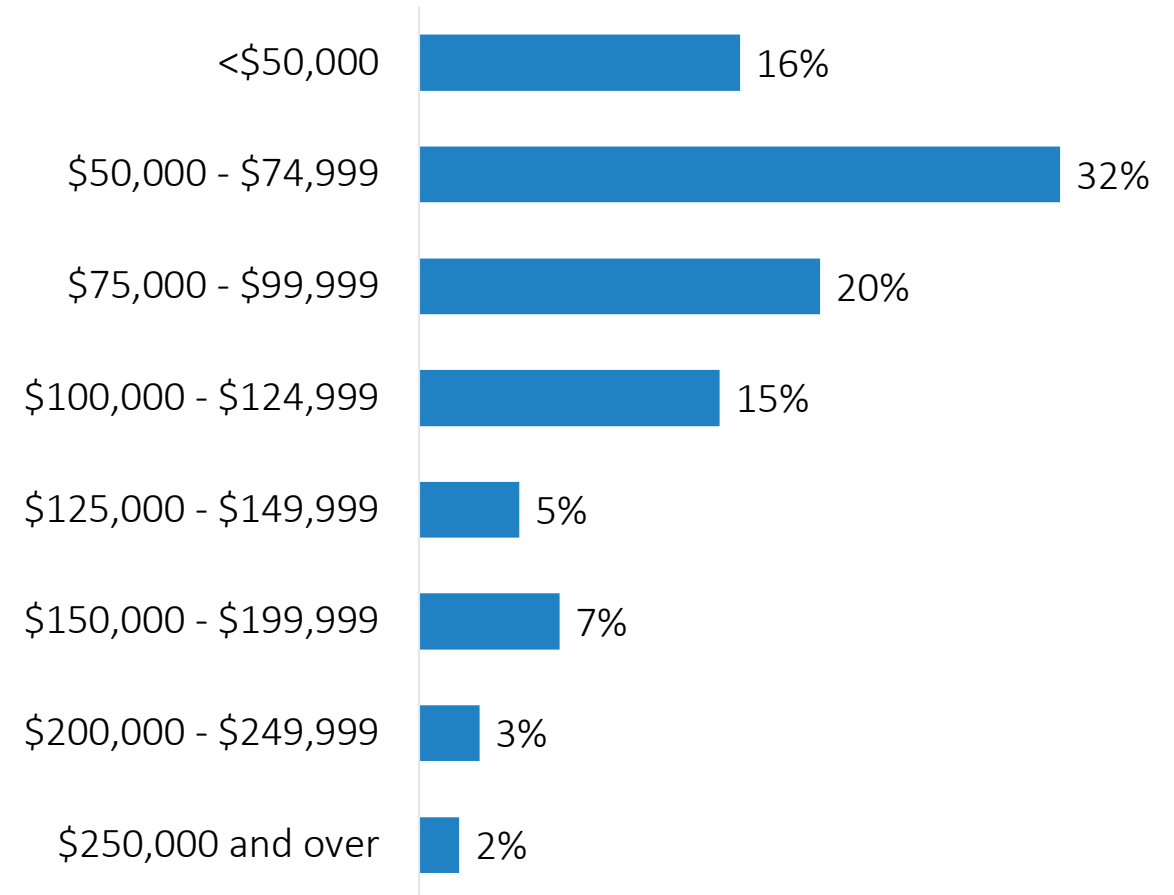
→ The median age of FY 2019 visitors was **57 years old**.



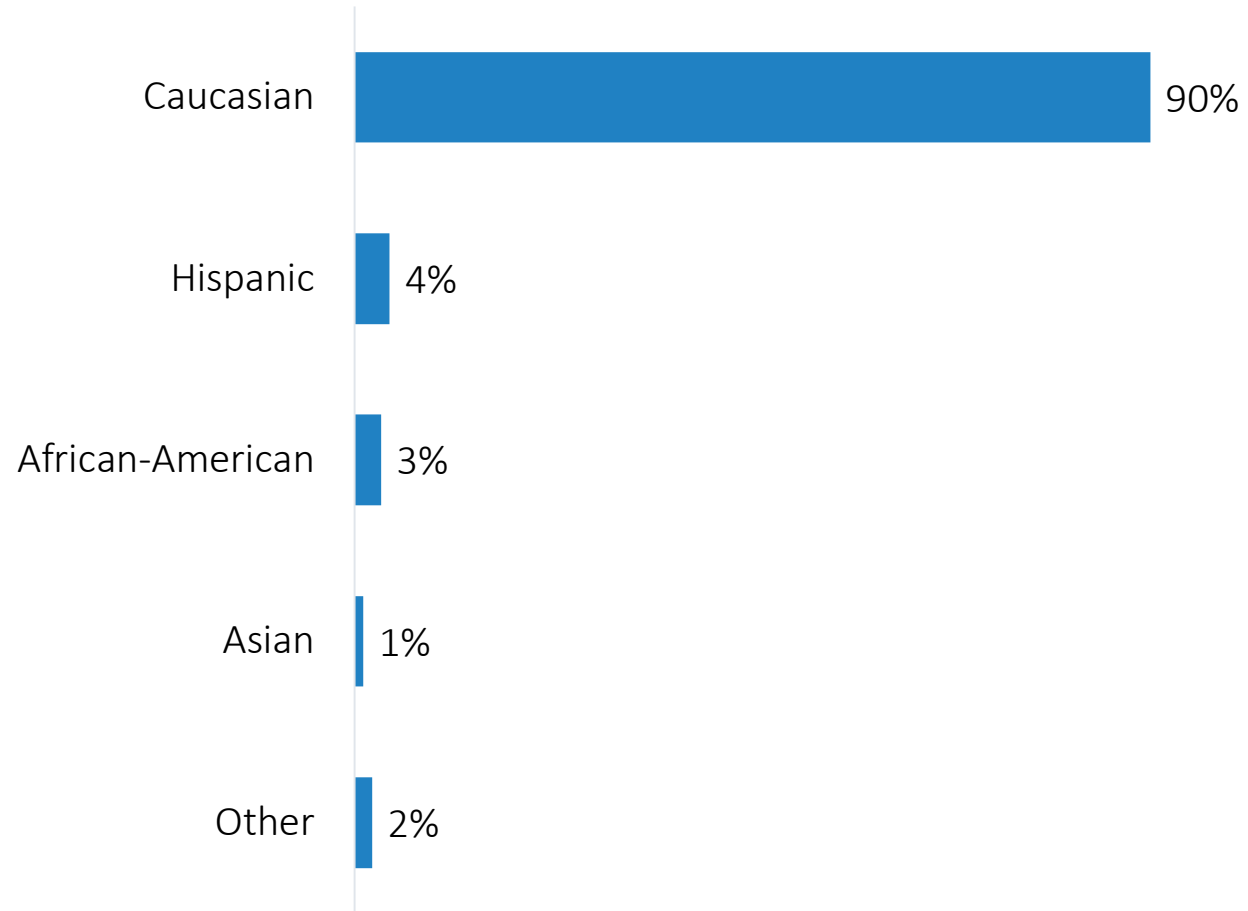
Household Income in 2018

Median Household Income

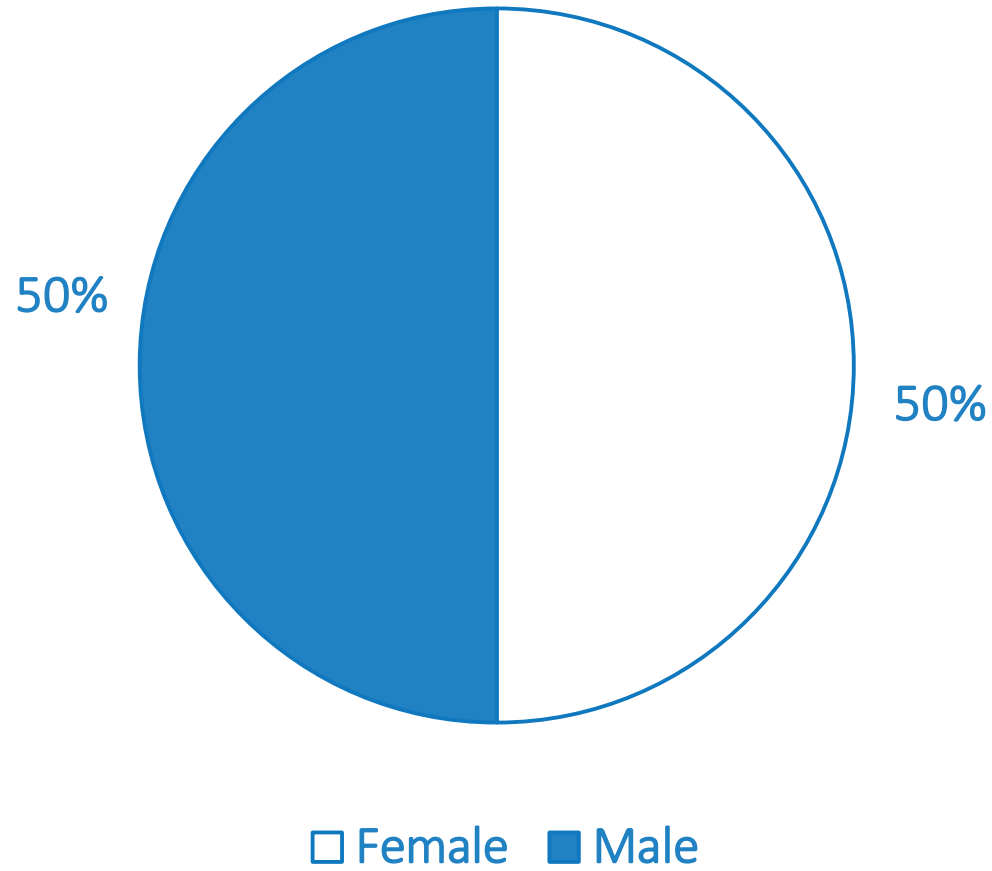
→ FY 2019 visitors had a median household income of **\$77,500**



Race/Ethnicity



Gender

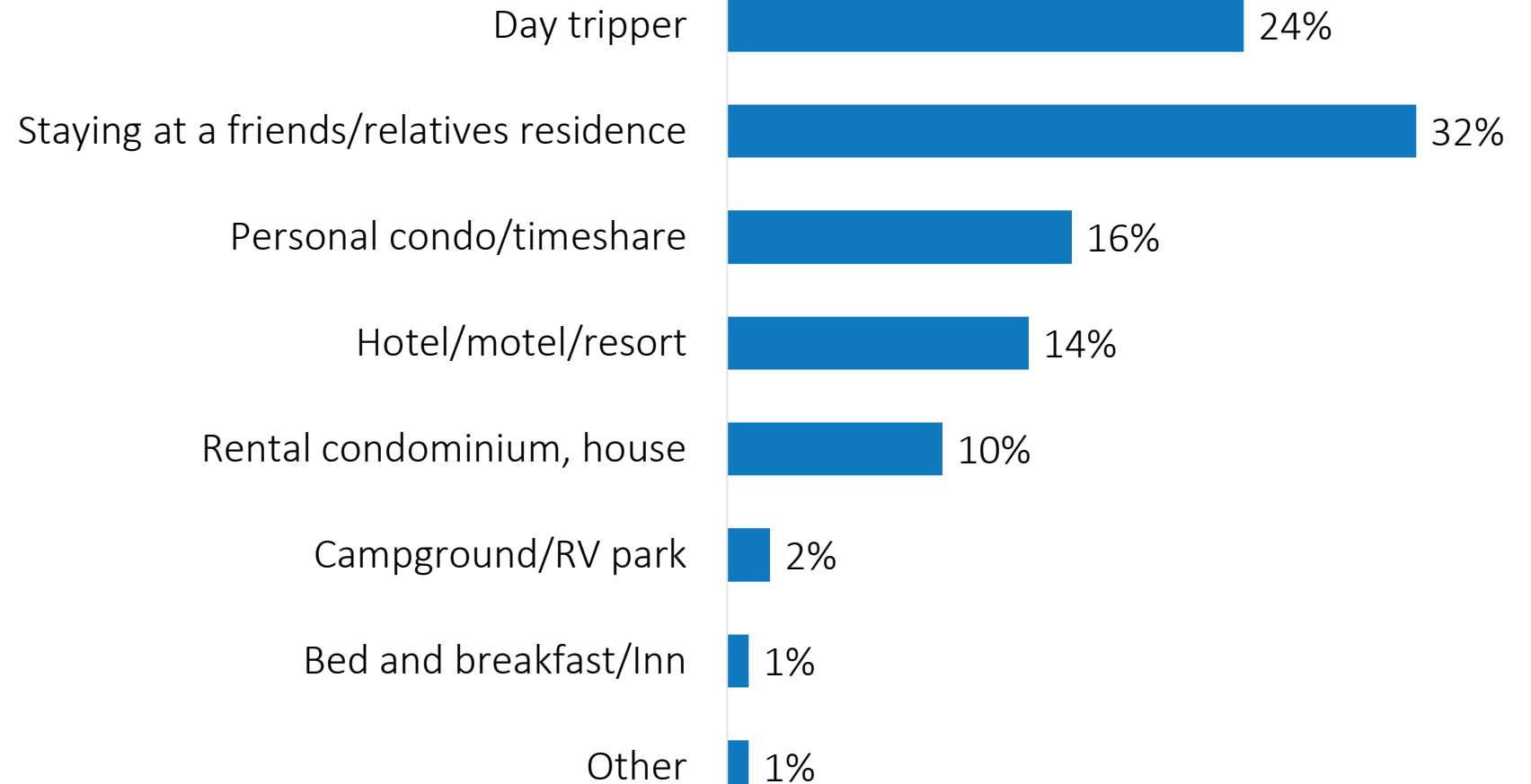


Visitor Journey: Trip Experience

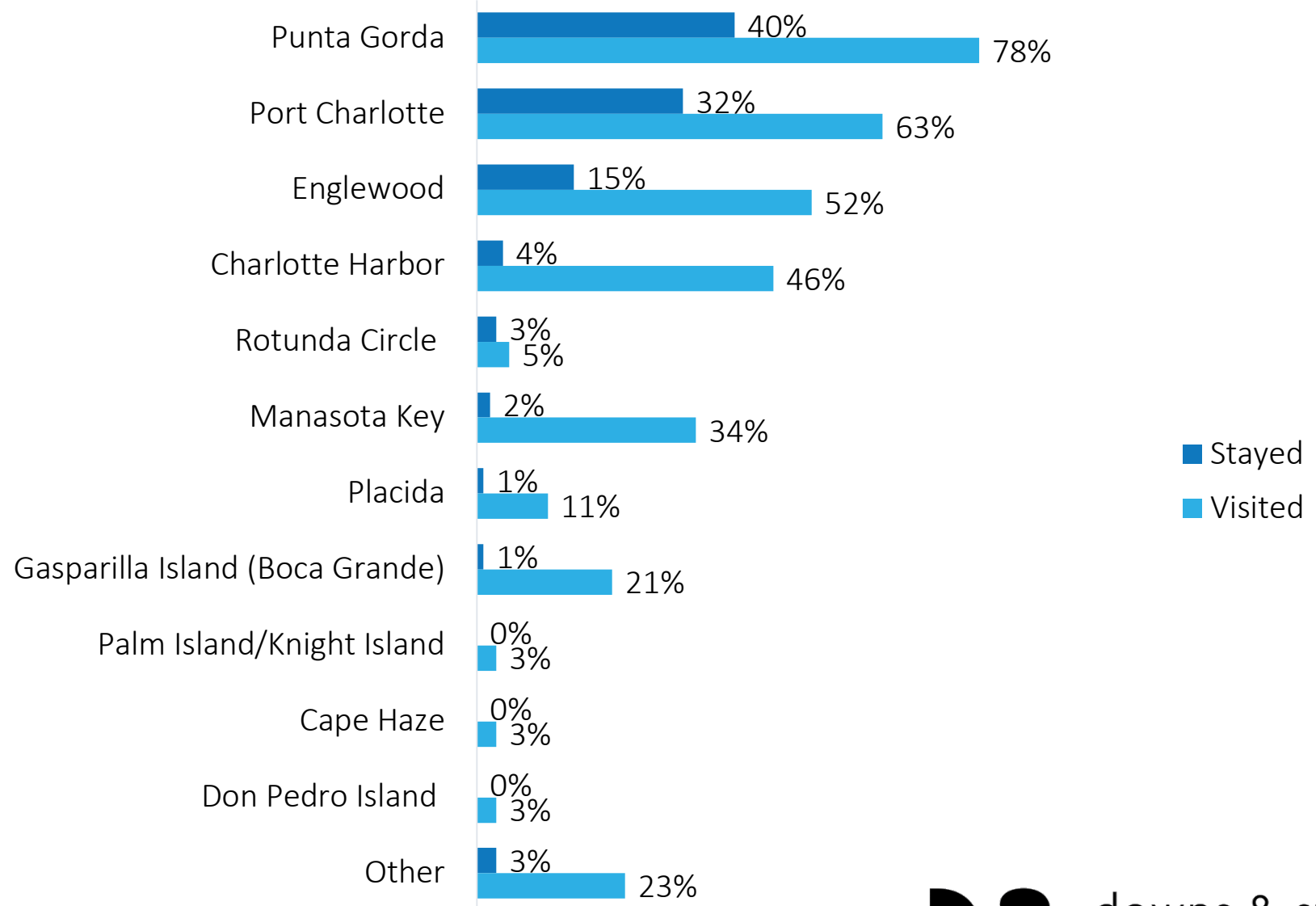


Visitors' Accommodations

→ **76%** of visitors stayed overnight in Punta Gorda/Englewood Beach



Area Stayed vs. Areas Visited



68

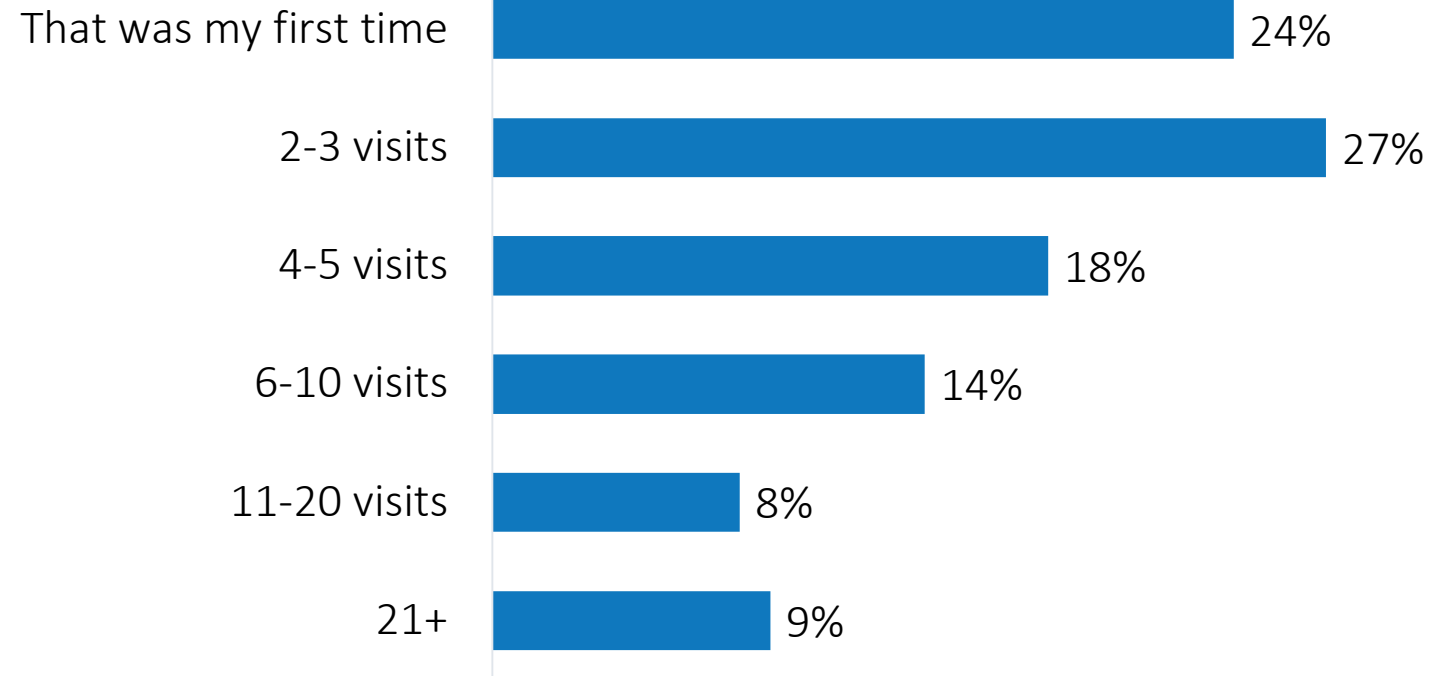
Typical Punta Gorda/Englewood Beach Visitor

→ Spent **10.2** nights in Punta Gorda/Englewood Beach

→ When including long term visitors¹, average nights stayed is **22.5**

→ **24%** were first time visitors

→ **17%** had visited more than 10 times



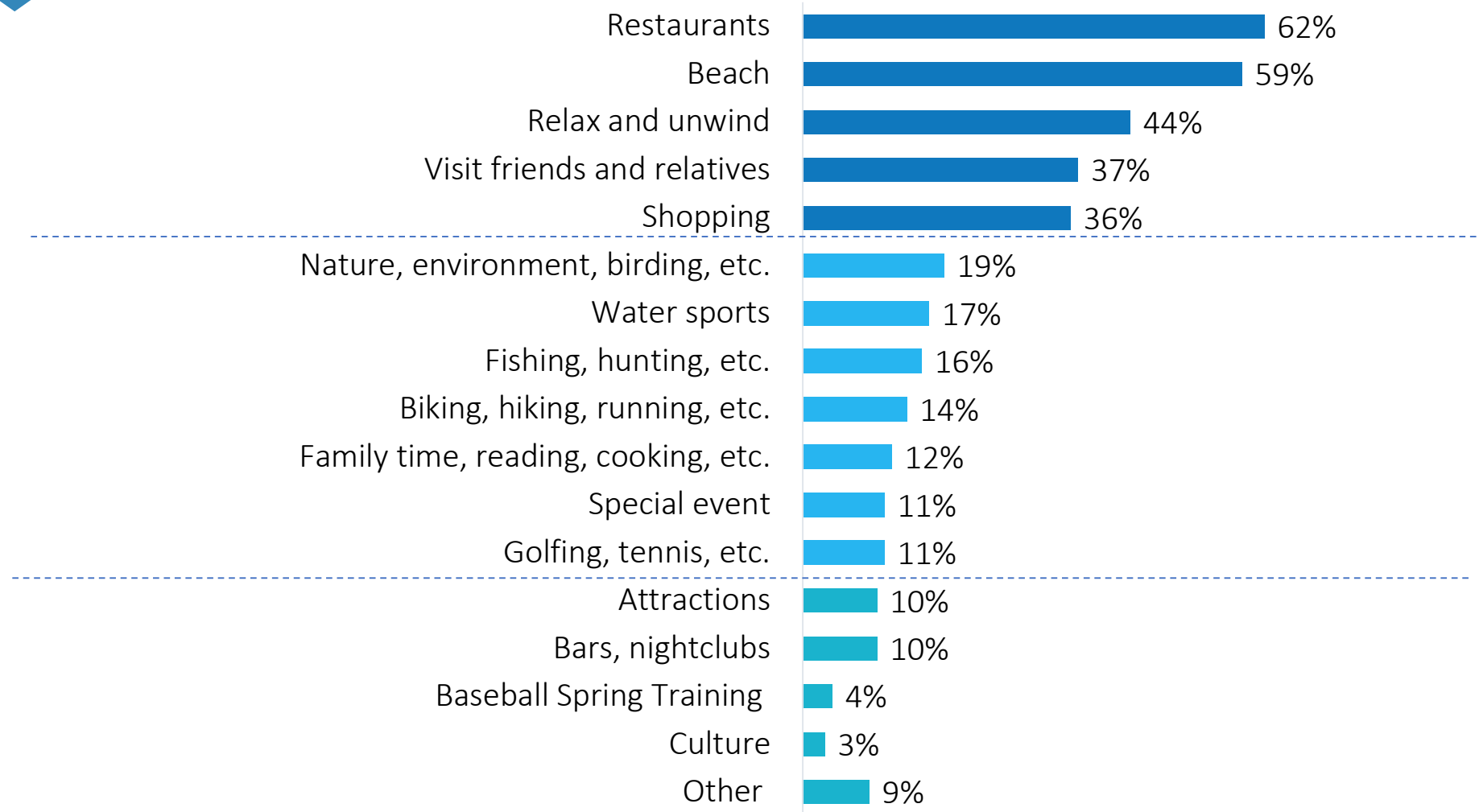
¹Visitors who stayed longer than 1 month

Punta Gorda/Englewood Length of Stay

- Visitors who stayed in non-paid accommodations stayed slightly longer than visitors who stayed in paid accommodations
- Travel party size was similar across types of travel parties

	Paid Accommodations	Non-paid Accommodations	Day Trippers	Average
Length of Stay	12.4	13.3	1.0	10.2
Travel Party Size	2.5	2.4	2.4	2.4

Visitor Activities¹



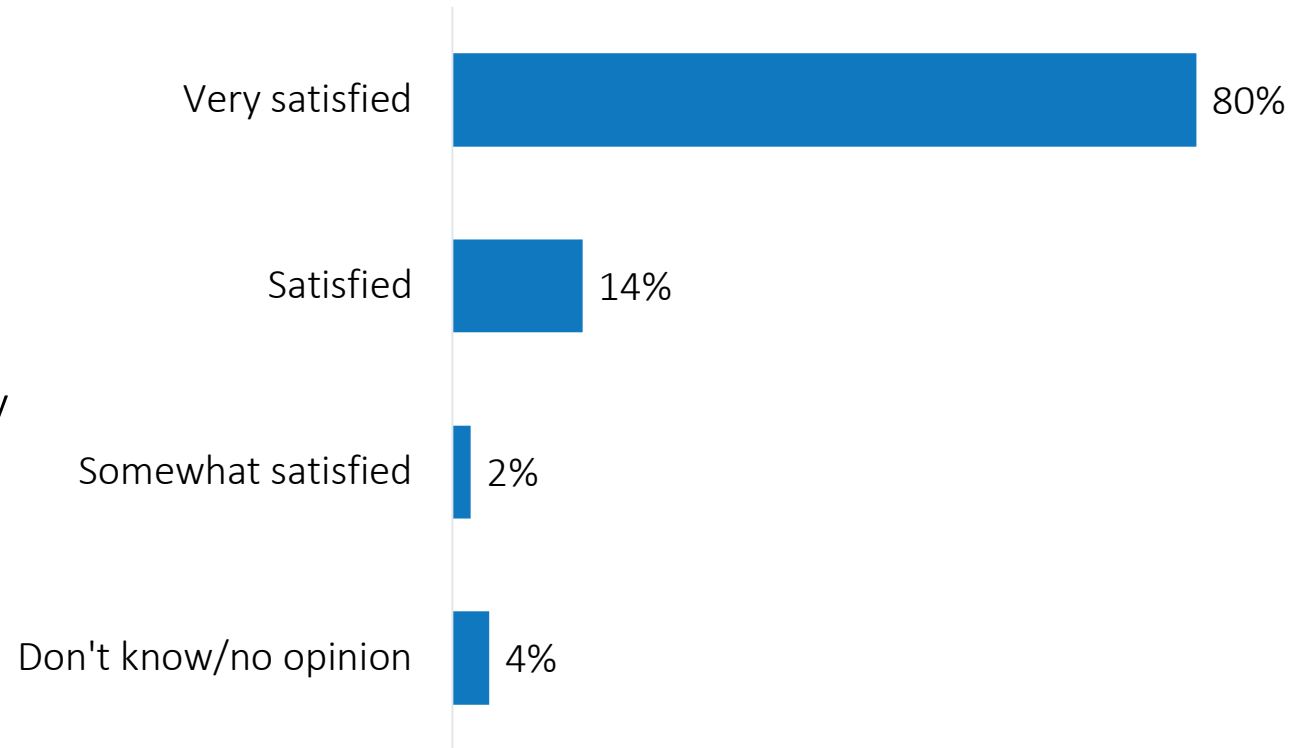
¹Multiple responses permitted.

Visitor Journey: Post-trip Evaluation



Visitor Satisfaction

- 94% would recommend Punta Gorda/Englewood Beach to a friend
- 96% will return¹
- 94% were satisfied or very satisfied with their stay



¹4% aren't sure about returning for the following reasons:
1. Prefer other areas; 2. Prefer a variety of vacation spots; 3. Too expensive.

Quarterly Comparisons



PUNTA GORDA
ENGLEWOOD BEACH

The Charlotte Harbor Gulf Island Coast



downs & st. germain
RESEARCH

Quarterly Comparisons

	October – December 2018	January – March 2019	April – June 2019	July – September 2019
Visitors	149,100	163,300	174,100	169,700
Room Nights	247,985	339,838	277,126	224,600
Direct Spending	\$92,379,300	\$145,602,800	\$105,545,600	\$83,804,600
Economic Impact	\$133,950,000	\$211,124,100	\$153,041,100	\$121,516,600
ADR	\$115.52	\$164.82	\$123.45	\$110.85
Occupancy Rate	49.0%	68.6%	56.0%	44.4%
RevPAR	\$56.74	\$114.55	\$69.13	\$49.22

Quarterly Comparisons

	October – December 2018	January – March 2019	April – June 2019	July – September 2019
Travel party size	2.4	2.3	2.4	2.7
Traveled with children	15%	12%	27%	29%
Length of Stay	10.2	12.2	8.4	5.2

	October – December 2018	January – March 2019	April – June 2019	July – September 2019
Drove to Charlotte	54%	61%	56%	51%
1st Time Visitors	21%	18%	30%	26%
11+ Visits to Charlotte	20%	14%	13%	21%

Quarterly Comparisons

	October – December 2018	January – March 2019	April – June 2019	July – September 2019
Requested a Visitors Guide	6%	7%	11%	7%
Requested a print version	1%	1%	2%	3%
Requested an online version	5%	6%	9%	4%
Visitor Guide Rating	8.6	7.8	9.1	6.8

	October – December 2018	January – March 2019	April – June 2019	July – September 2019
Would recommend Charlotte County to a friend	94%	97%	95%	90%
Will return to Charlotte County	95%	97%	94%	96%

Quarterly Comparisons

	October – December 2018	January – March 2019	April – June 2019	July – September 2019
Southeast	23%	15%	28%	43%
Midwest	35%	40%	37%	29%
Northeast	27%	31%	25%	20%
West	2%	3%	2%	2%
International	13%	11%	8%	6%

	October – December 2018	January – March 2019	April – June 2019	July – September 2019
Florida	14%	6%	17%	34%
Pennsylvania	4%	6%	5%	6%
Michigan	7%	7%	9%	2%
New York	5%	9%	7%	4%
Ohio	9%	11%	10%	7%
Canada	9%	9%	5%	1%

Quarterly Comparisons

	October – December 2018	January – March 2019	April – June 2019	July – September 2019
Naples	4%	1%	7%	18%
Sarasota	4%	1%	6%	9%
New York City	5%	4%	4%	4%
Cincinnati	3%	4%	2%	3%
Detroit	3%	3%	4%	1%

	October – December 2018	January – March 2019	April – June 2019	July – September 2019
Median Age	58	59	56	51
Gender (Male)	55%	52%	54%	48%
Median Income	\$97,800	\$74,200	\$76,800	\$77,500

Punta Gorda/Englewood Beach VCB Economic Impact & Visitor Tracking Report FY 2019

October 2018 – September 2019

Joseph St. Germain, Ph.D.
Phillip Downs, Ph.D.
Rachael Anglin
Isiah Lewis
Glencora Haskins
Downs & St. Germain Research

