

Punta Gorda/Englewood Beach VCB Economic Impact & Visitor Tracking Report FY 2020

October 2019 – September 2020



Visitor Journey



Executive Summary



Visitor Journey – Impact of Tourism



Tourism Matters to Charlotte County

Visitor spending in FY 2020 generated
a total economic impact of

\$622,140,500

in Charlotte County

(+0.4% from FY 2019)



Direct Spending

Visitors who traveled to Charlotte
County in FY 2020 spent

\$429,062,400

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

(+0.4% from FY 2019)



Visitors

Charlotte County
attracted
699,400
visitors in FY 2020
(+6.6% from FY 2019)



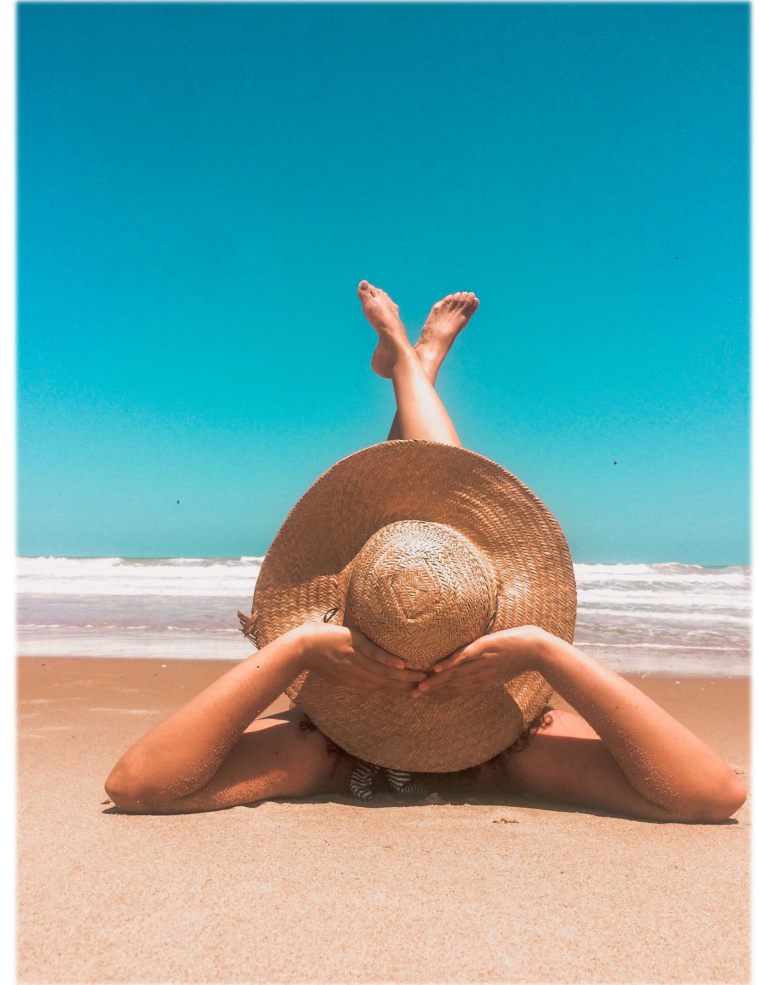
Room Nights

Charlotte County visitors
generated

1,070,597

room nights in paid
accommodations in FY 2020

(-1.7% from FY 2019)



Jobs & Wages

Tourism in Charlotte County
supported

7,728

local jobs in FY 2020 , generating

\$166,465,300

in wages and salaries



Visitors Create Jobs

An additional Charlotte
County job is supported
by every

91

visitors



Tourism Development Tax

Paid accommodations and vacation rentals by visitors to Charlotte County in FY 2020 resulted in

\$4,439,963

in TDT collected

(+2.4% from FY 2019)



Household Savings

Visitors to Charlotte
County save local
residents

\$703

per household in taxes
every year



Marketing Spending

Every dollar spent by Punta Gorda/Englewood Beach VCB on marketing, sales, and public relations efforts is associated with

\$526

in visitor spending within Charlotte County



Visitor Journey – Pre-Visit



Trip Planning

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



Previous visit (43%)



Internet (31%)



Friend, coworker, etc. (27%)

Punta Gorda/Englewood Beach Promotions

- » **27%** of visitors recalled promotions about the Punta Gorda/Englewood Beach area before their visit
- » **70%** of those who recalled advertising were influenced to come to the area
- » Top sources of noticed promotions:



Online Article (**28%**)



Television (**27%**)



Newspaper (**26%**)

Accommodation Booking¹



45% Directly with hotel/condo



26% Online travel agency



10% Airbnb



8% VRBO, HomeAway

Transportation



65% of visitors drove to
Punta Gorda/Englewood Beach



14% of all visitors flew in via
the Punta Gorda Airport



11% of all visitors flew in
via the Southwest Florida
International Airport

Top Reasons for Visiting¹



Visit friends/relatives (35%)



Relax & unwind (24%)



Family vacation (23%)



Beach (23%)

Other Destinations Considered

- » **69%** of visitors only considered visiting Punta Gorda/Englewood Beach when planning their trip
- » **31%** of visitors considered the following destinations:



Ft. Myers/
Cape Coral (**13%**)



Sarasota (**8%**)



Tampa (**6%**)



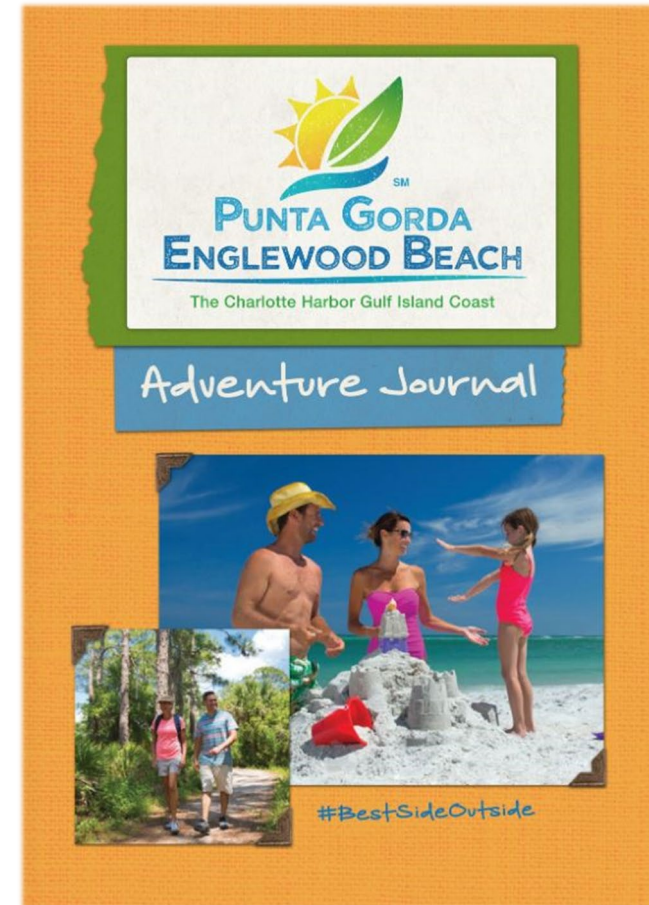
St. Petersburg/
Clearwater (**6%**)



Naples (**5%**)

Visitors Guide

- » **11%** of visitors requested a Visitors Guide
- » Visitors Guide received a rating of **7.8 out of 10.0**¹



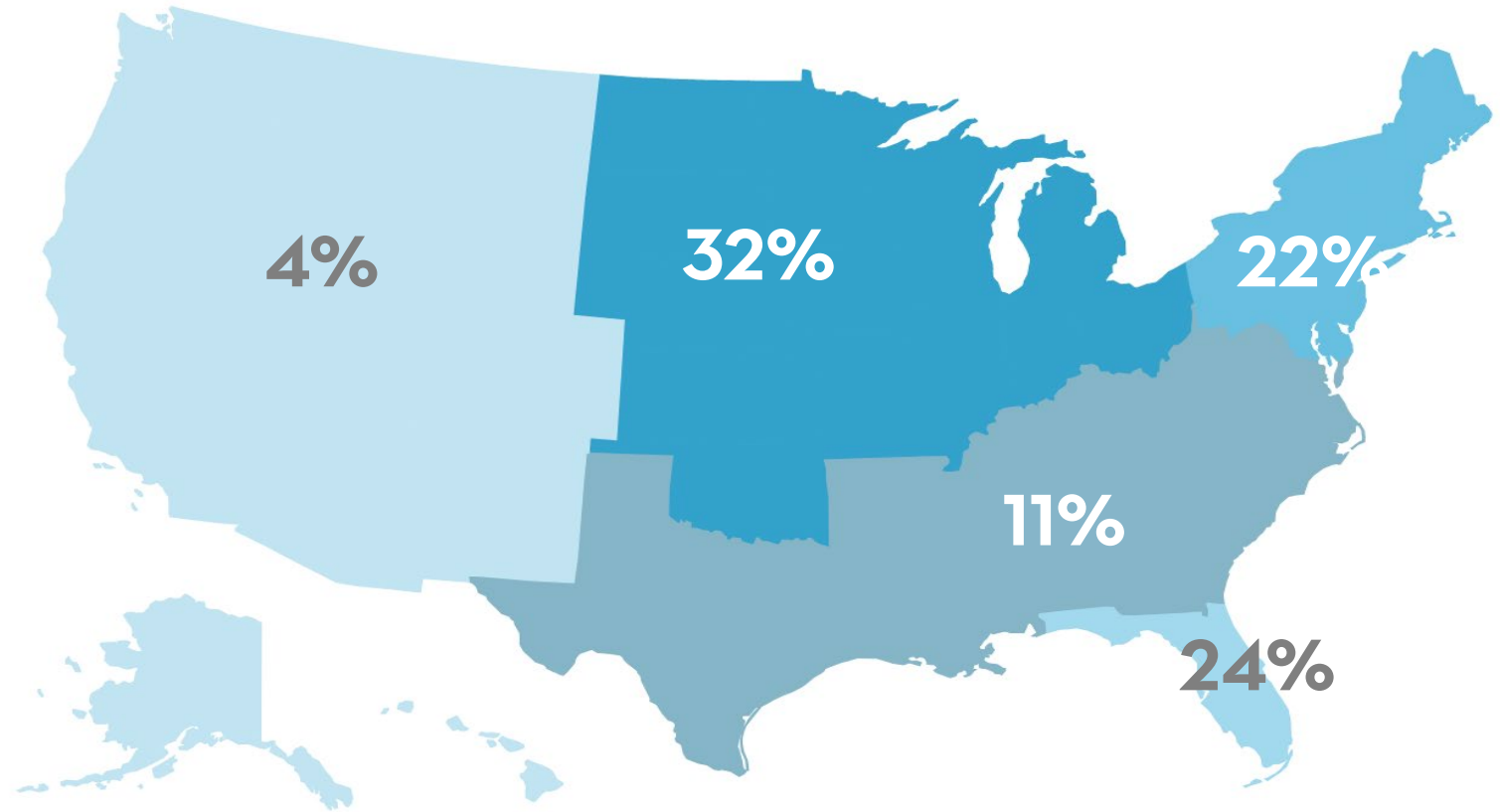
¹Rated on a 10-point scale where 10 is extremely useful and 1 is not at all useful.

Visitor Journey – Traveler Profile



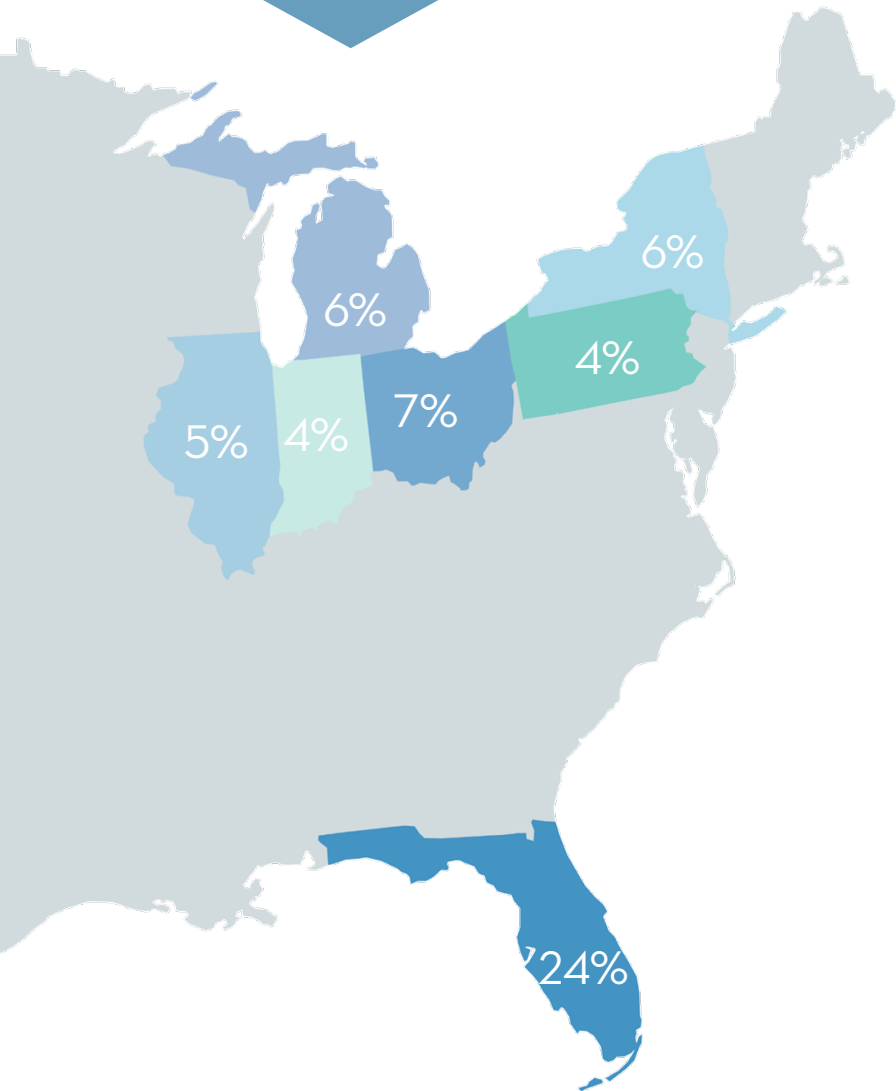
Top Regional Origins of Visitors

- » **93%** of Charlotte County visitors lived in the United States
- » **7%** of visitors to Charlotte County were from outside of the United States¹

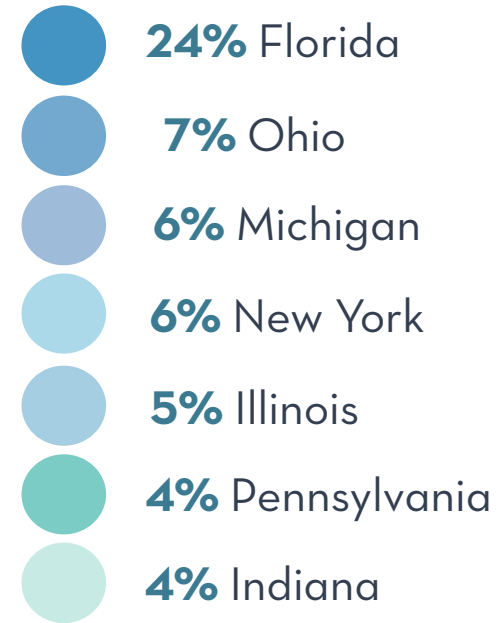


¹Top international markets included Canada and the United Kingdom

Top State Origins of Visitors



Over half of visitors traveled to Charlotte County from 7 states



Top Market Origins of Visitors

31% of visitors come from 8 markets



6% Naples-Ft. Myers



5% New York City¹



5% Sarasota-Bradenton



3% Miami-Ft. Lauderdale



3% Detroit



3% Chicago



3% Orlando



3% Atlanta

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

Travel Party Size and Composition

- » The typical visitor traveled in a party composed of **2.8** people
- » **33%** traveled with at least one person under the age of 20
- » **1 in 3** traveled as a couple, while another **1 in 3** visitors traveled as a family



Length of Stay – All Visitors*

- » Visitors spent **8.5¹** nights in Punta Gorda/Englewood Beach



¹Nights stayed capped at 30 nights. Average length of stay is 18.0 nights when nights stayed is not capped.

*Nights stayed includes Day Trippers.

First Time Visitors

- » **21%** were first time visitors
- » **26%** had visited more than 10 times



Typical Punta Gorda/Englewood Beach Visitor

» The typical Visitor:

- » Was 52 years old
- » Had a median household income of \$84,400
- » Was female (51%)
- » Was from:
 - » Southeast (35%)
 - » Midwest (32%)



Typical Day Trip Visitor



- » The Typical Day Trip Visitor:
 - » Was 52 years old
 - » Had a median household income of \$80, 200
 - » Was equally likely to be male/female (50%)
 - » Was from:
 - » Naples-Ft. Myers (22%)
 - » Sarasota-Bradenton (13%)

Typical Vacationer Visitor

- » The Typical Vacationer¹ Visitor:
 - » Was 49 years old
 - » Had a median household income of \$85,700
 - » Was female (54%)
 - » Stayed in Punta Gorda/Englewood Beach for 5.2 nights
 - » Was from:
 - » Midwest (36%)
 - » Northeast (23%)



¹Travel parties who stayed 1-10 nights.

Typical Long-Term Visitor

- » The Typical Long-Term¹ Visitor:
 - » Was 58 years old
 - » Had a median household income of \$91,700
 - » Was equally likely to be male/female (50%)
 - » Stayed in Punta Gorda/Englewood Beach for 26 nights
 - » Was from
 - » Midwest (36%)
 - » Northeast (32%)
 - » International (16%)



¹Travel parties who stayed more than 10 nights.

Visitor Journey – Trip Experience



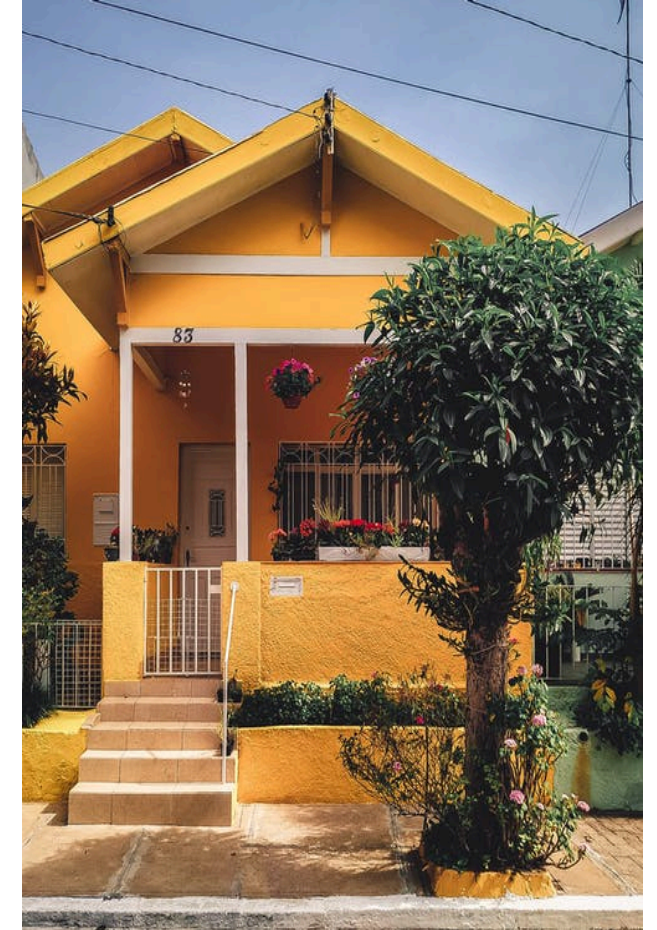
Visitors' Accommodations



27% Hotel/motel/resort



24% Day tripper



22% Family/friend's residence

Top Activities During Visit¹



Beach (57%)



Restaurants (49%)



Relax & unwind (41%)



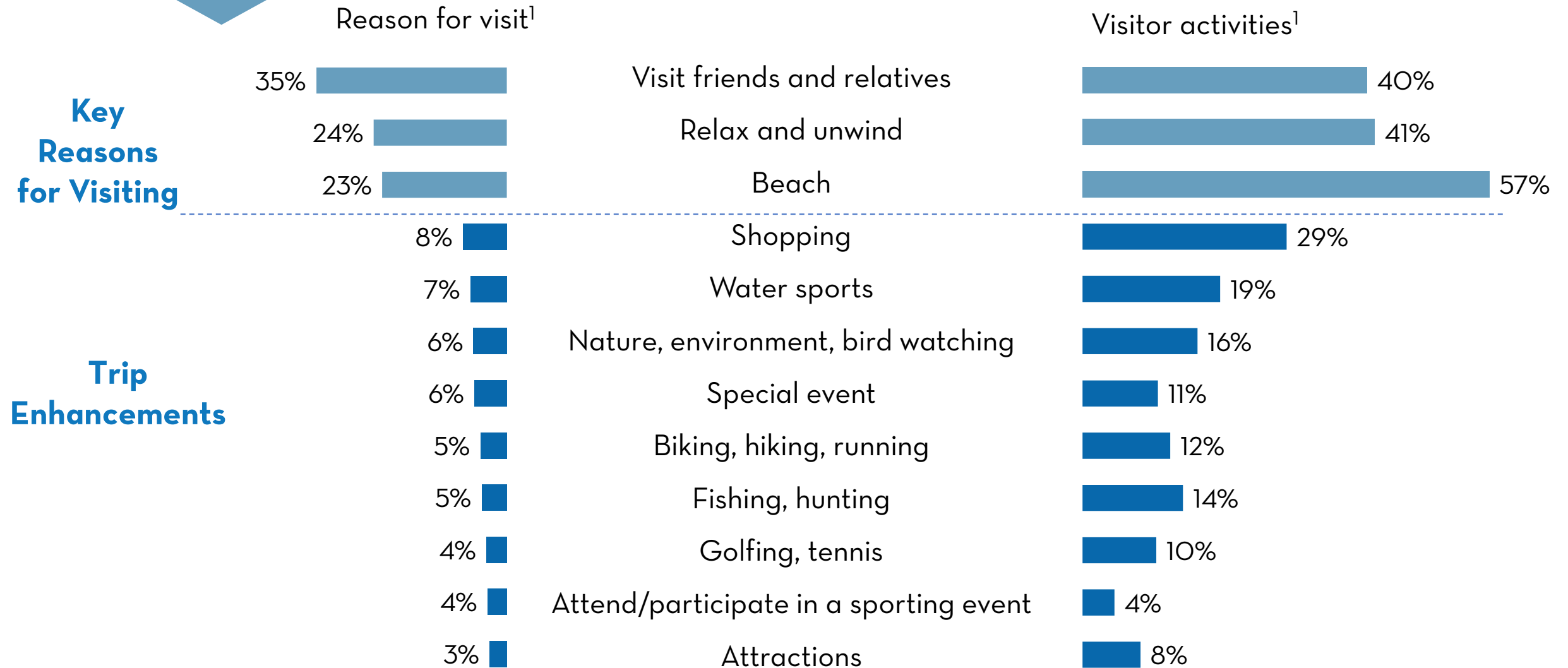
Visit friends/relatives
(40%)



Shopping (29%)

¹Multiple responses permitted

Reason for Visit vs. Visitor Activities



¹Multiple responses permitted.

Visitor Journey – Post-Trip Evaluation



Visitor Satisfaction¹

- » **95%** of visitors would recommend Punta Gorda/Englewood Beach
- » **96%** will return
- » **94%** were satisfied or very satisfied with their stay



¹10=Excellent; 1=Poor.

Detailed Findings



Visitor Journey – Impact of Tourism



Economic Impact

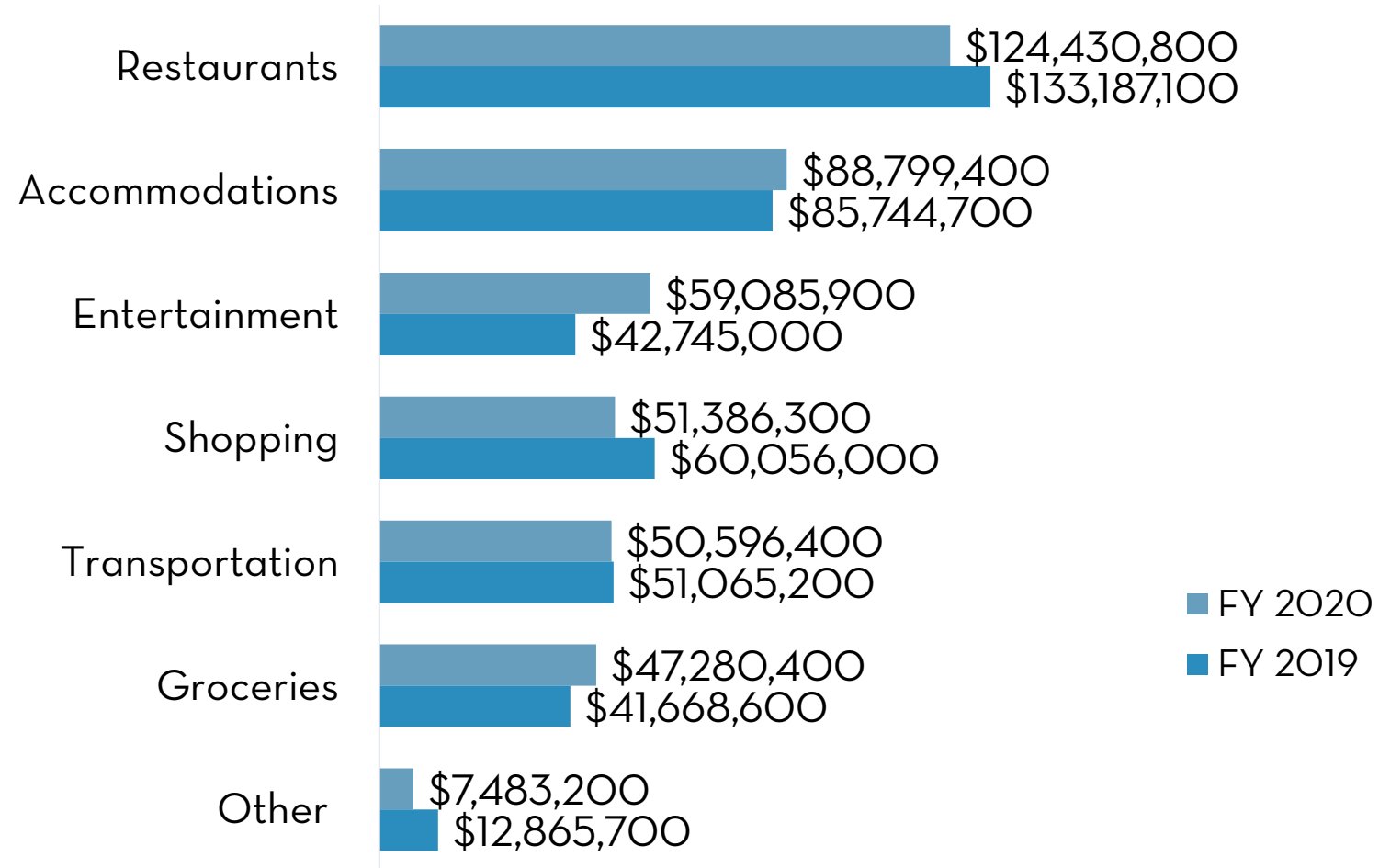
	FY2019	FY2020	% Change
Total Economic Impact	\$619,631,800	\$622,140,500	+0.4%
Direct Spending	\$427,332,300	\$429,062,400	+0.4%
Room Nights Generated	1,089,549	1,070,597	-1.7%
Average Daily Rate	\$128.72	\$127.86	-0.7%
Occupancy	54.5%	52.2%	-4.2%
Revenue per Available Room	\$70.16	\$66.74	-4.9%

Key Measures

	FY2019	FY2020	% Change
Total Visitors	656,200	699,400	+6.6%
Jobs Supported	7,620	7,728	+1.4%
Wages Generated	\$162,511,000	\$166,465,300	+2.4%
Total Taxes Paid	\$52,809,100	\$53,558,500	+1.4%
TDT Collected	\$4,336,758	\$4,439,963	+2.4%

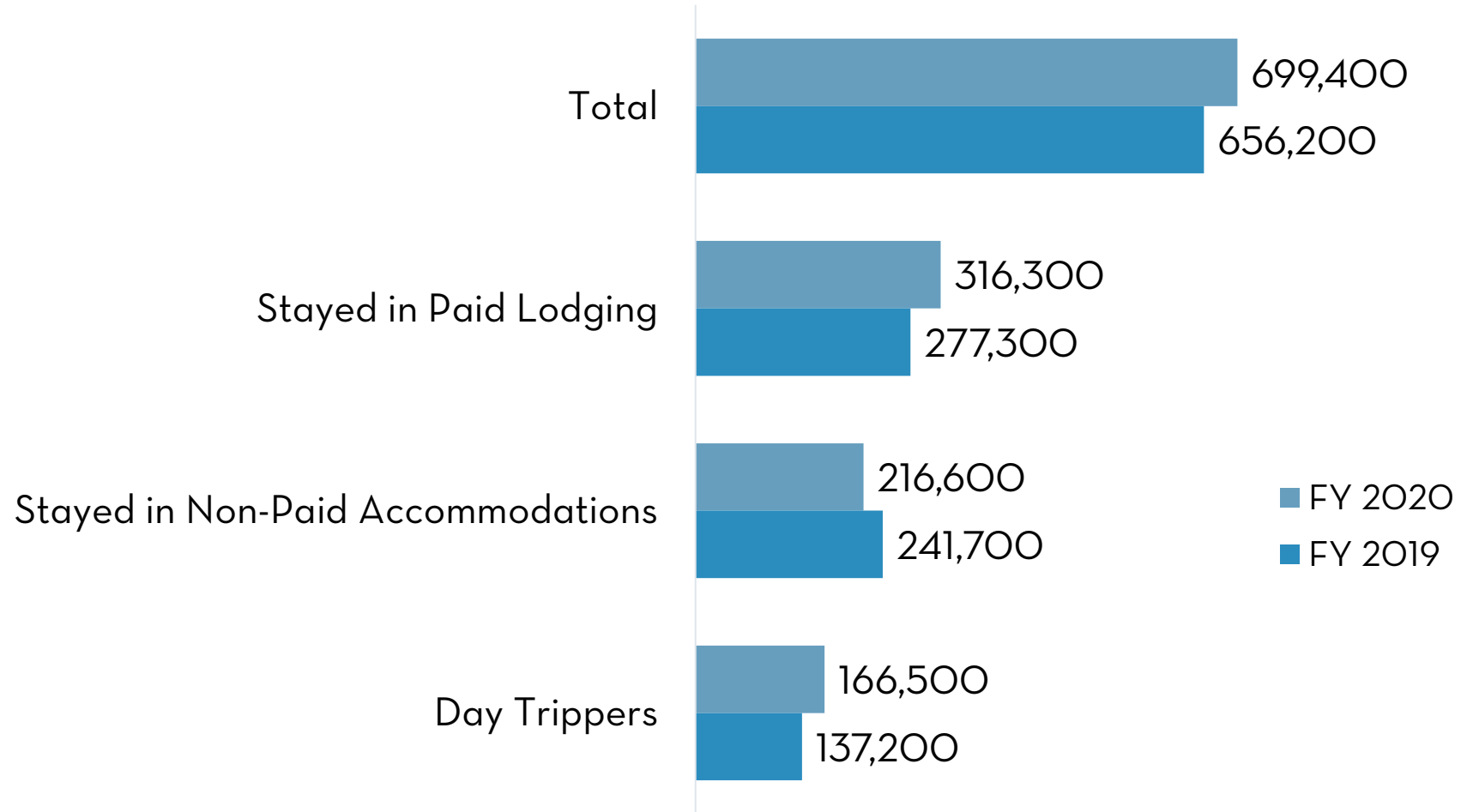
Visitors Spending by Category

» Punta Gorda/Englewood Beach visitors spent **\$429,062,400** in Charlotte County in FY2020

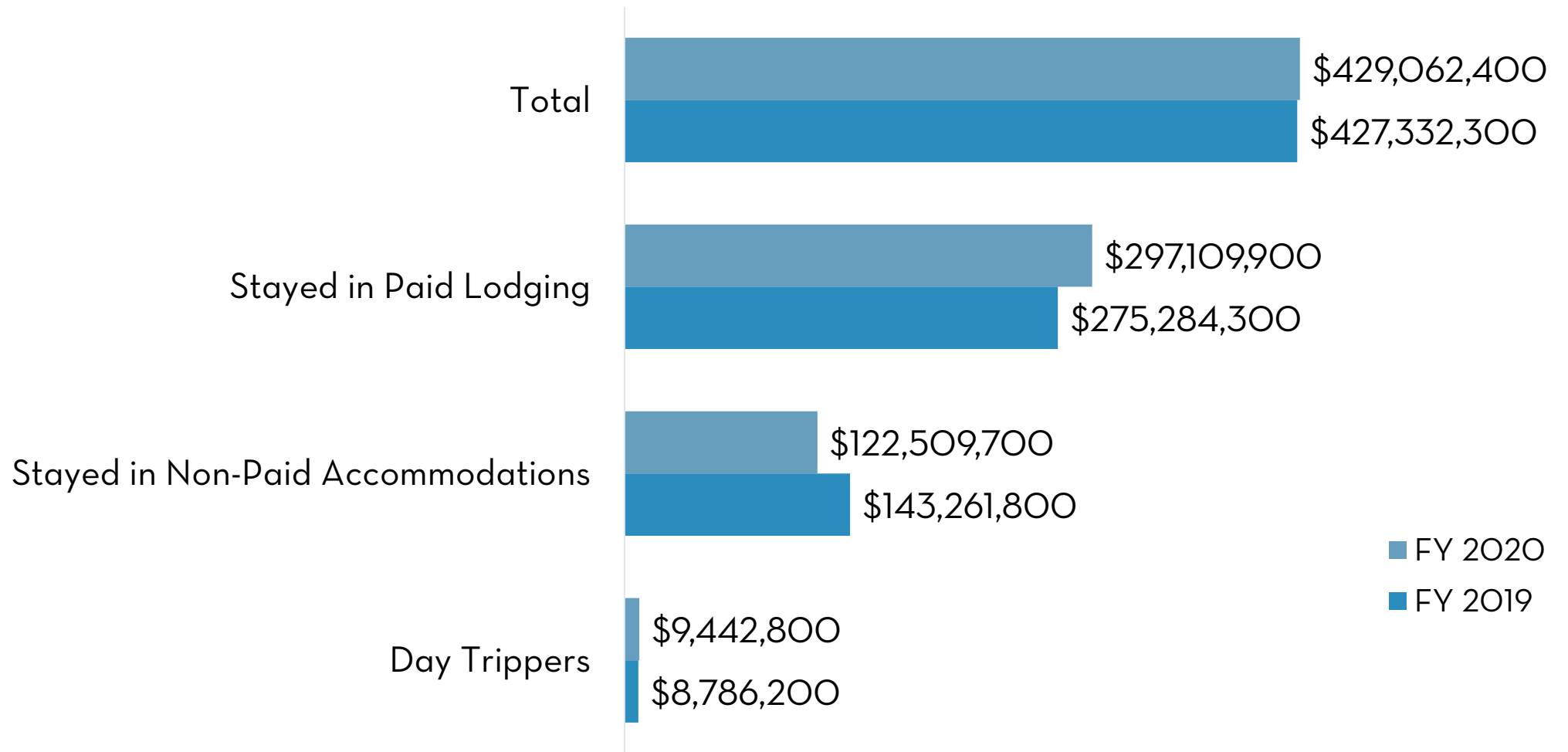


Traveler Type

» Punta Gorda/Englewood Beach attracted **699,400** visitors to Charlotte County in FY2020



Direct Spending by Traveler Type

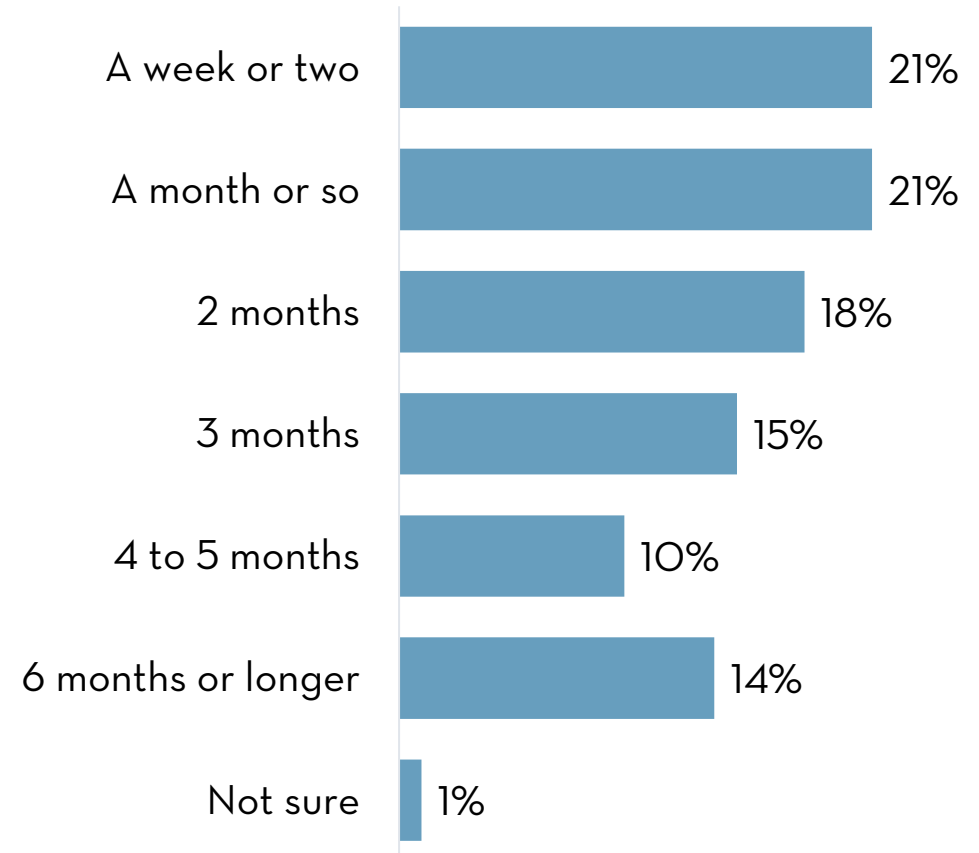


Visitor Journey – Pre-Visit



Trip Planning Cycle

- » **2 in 5** visitors had **short planning windows** (less than a month)
- » **2 in 5** visitors planned their trips at least 3 months in advance



Trip Planning Sources¹

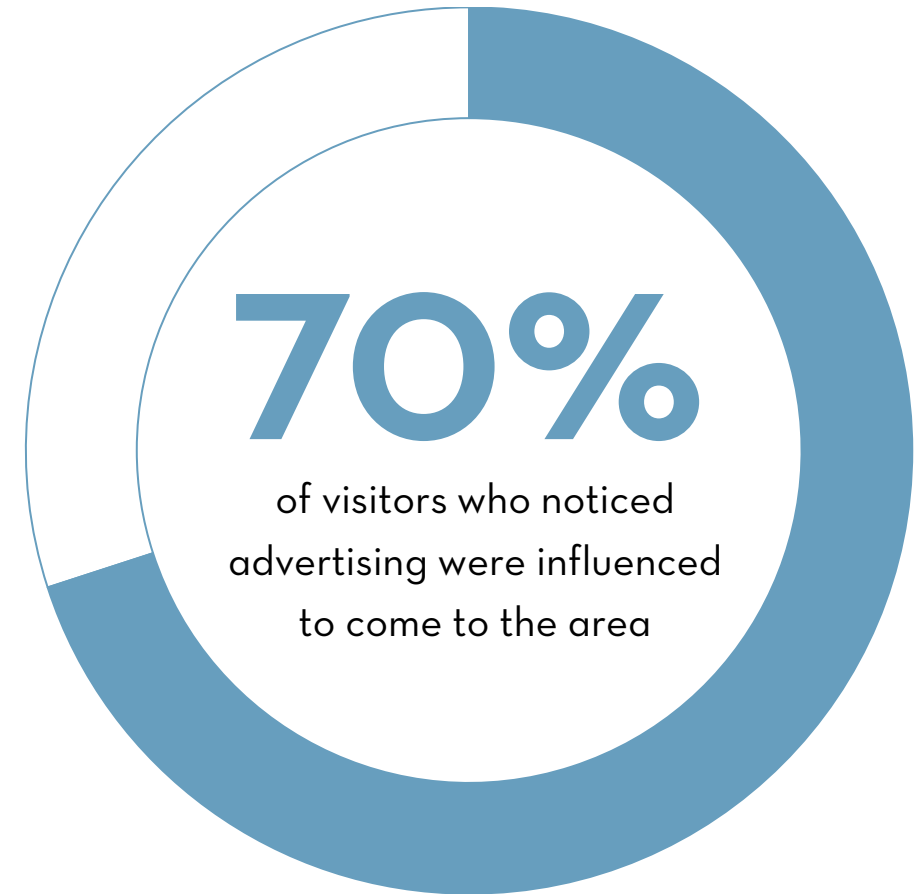
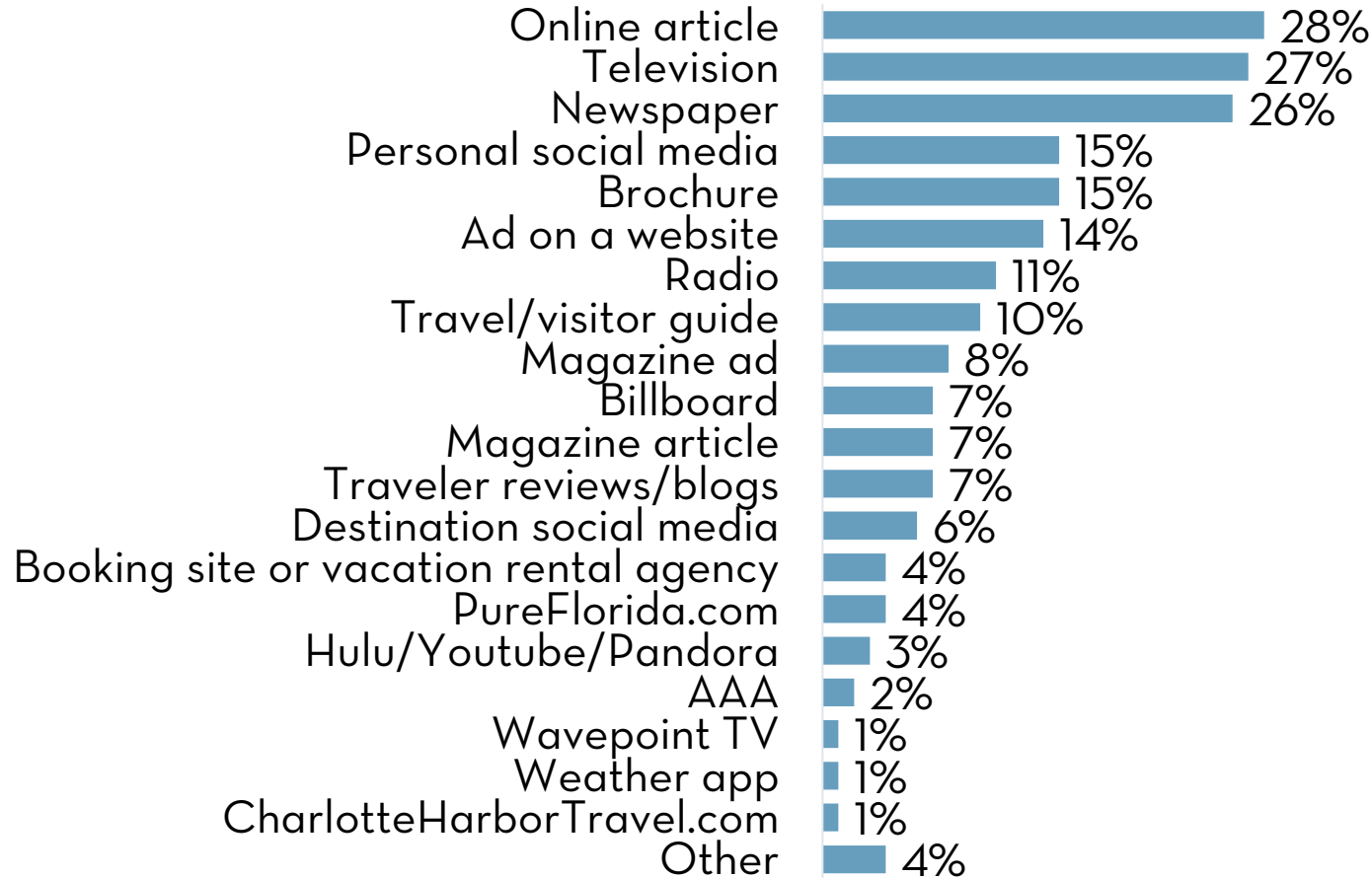
- » **2 in 5** visitors have used their previous experiences in Charlotte county to help plan their trip
- » **1 in 3** visitors used the internet to plan their trip
 - » **Social networking sites, booking sites and traveler reviews/blogs** were the top sources among internet users

Trip Planning Source	
Previous Visit	43%
Internet	31%
Social networking sites	12%
Booking websites	7%
Traveler reviews/blogs	5%
Friend, co-worker, etc.	27%
Brochures/travel guides/visitor guides	5%
Newspapers	4%
Television	3%
Magazines	3%
Travel agent	2%
AAA	2%
Other	5%
None/don't know	11%

¹Multiple responses permitted.

Punta Gorda/Englewood Beach Promotions¹

» **27%** of visitors noticed promotions or travel stories about the Punta Gorda/Englewood Beach area on the following sources:



¹Multiple responses permitted.

Charlotte County Promotion Influences

- » Awareness of promotions for the destination was highest among visitors staying in paid accommodations

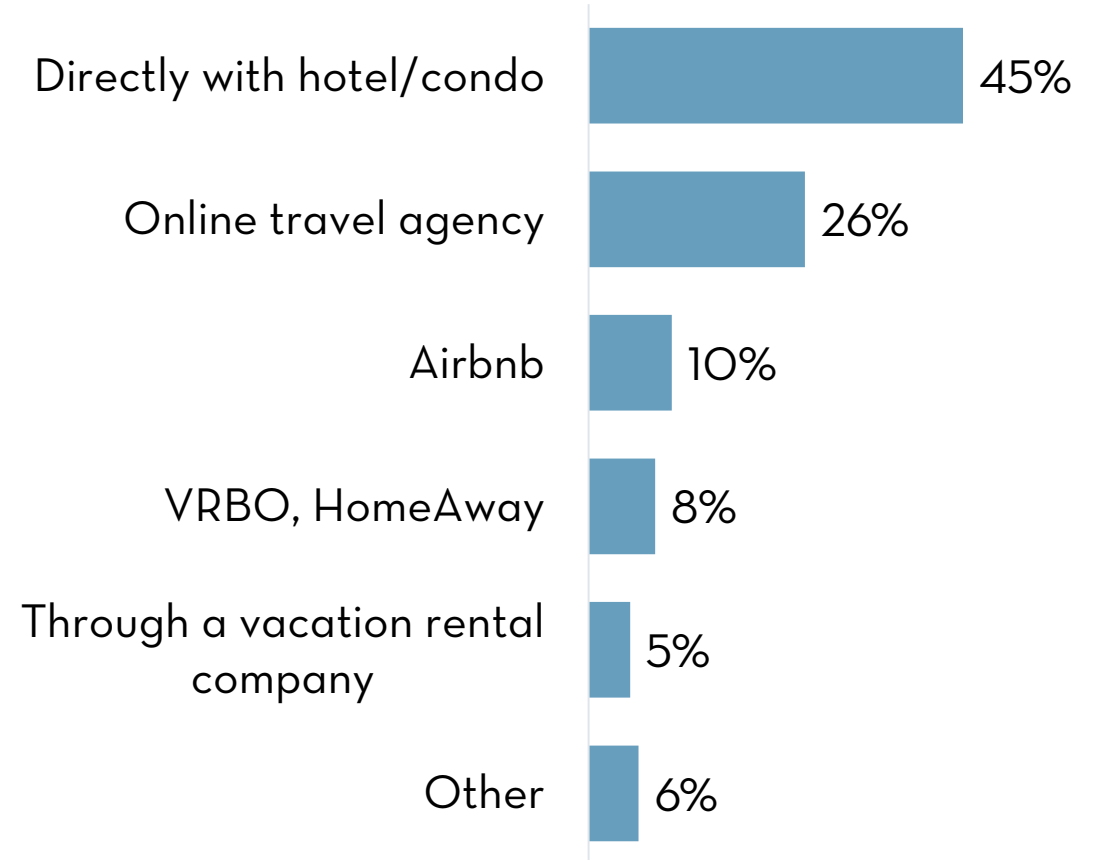
Saw Advertising	Paid Accommodations	Non-paid Accommodations	Day Trippers	All Visitors
Yes	31%	22%	26%	27%
No	59%	68%	61%	63%
Don't know	9%	9%	13%	10%

- » **7 in 10** visitors who saw promotions were impacted to visit

Influenced by Advertising	Paid Accommodations	Non-paid Accommodations	Day Trippers	All Visitors who saw Ads
Yes	78%	63%	75%	70%
No	18%	34%	36%	27%
Don't know	3%	2%	0%	3%

Paid Accommodation Booking¹

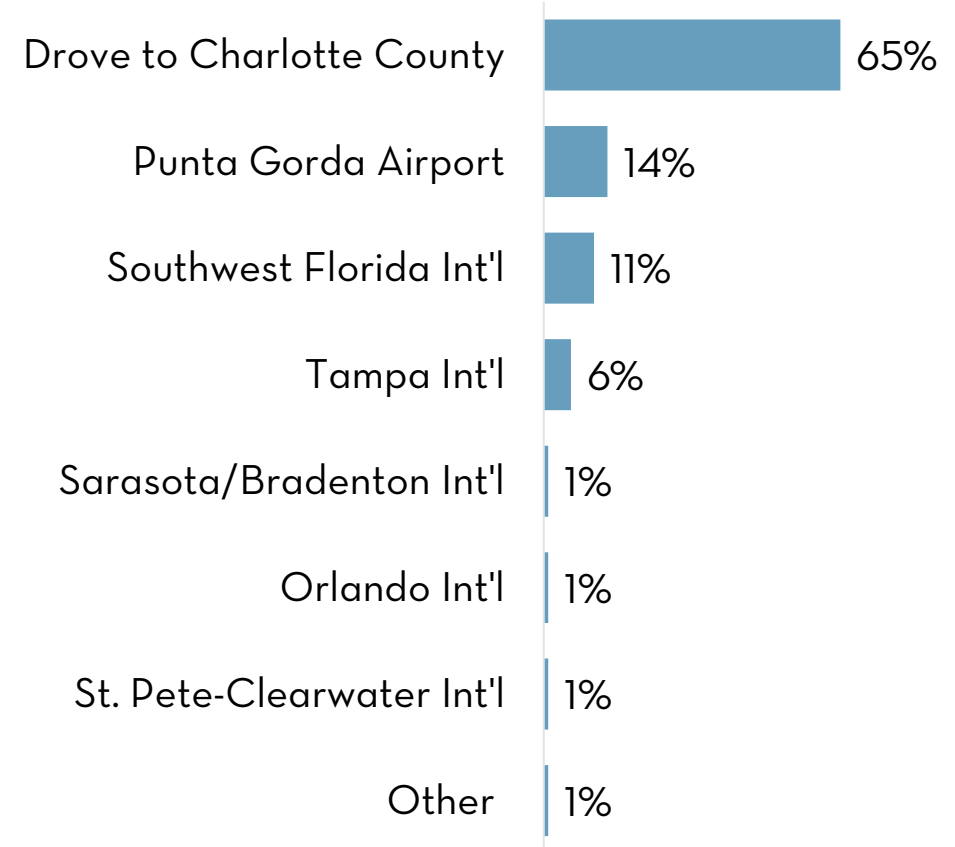
- » **Over 2 in 5** visitors who stayed in paid accommodations booked directly with a hotel/condo
- » Online travel agencies accounted for **1 in 4** bookings



Visitors staying in paid accommodations.

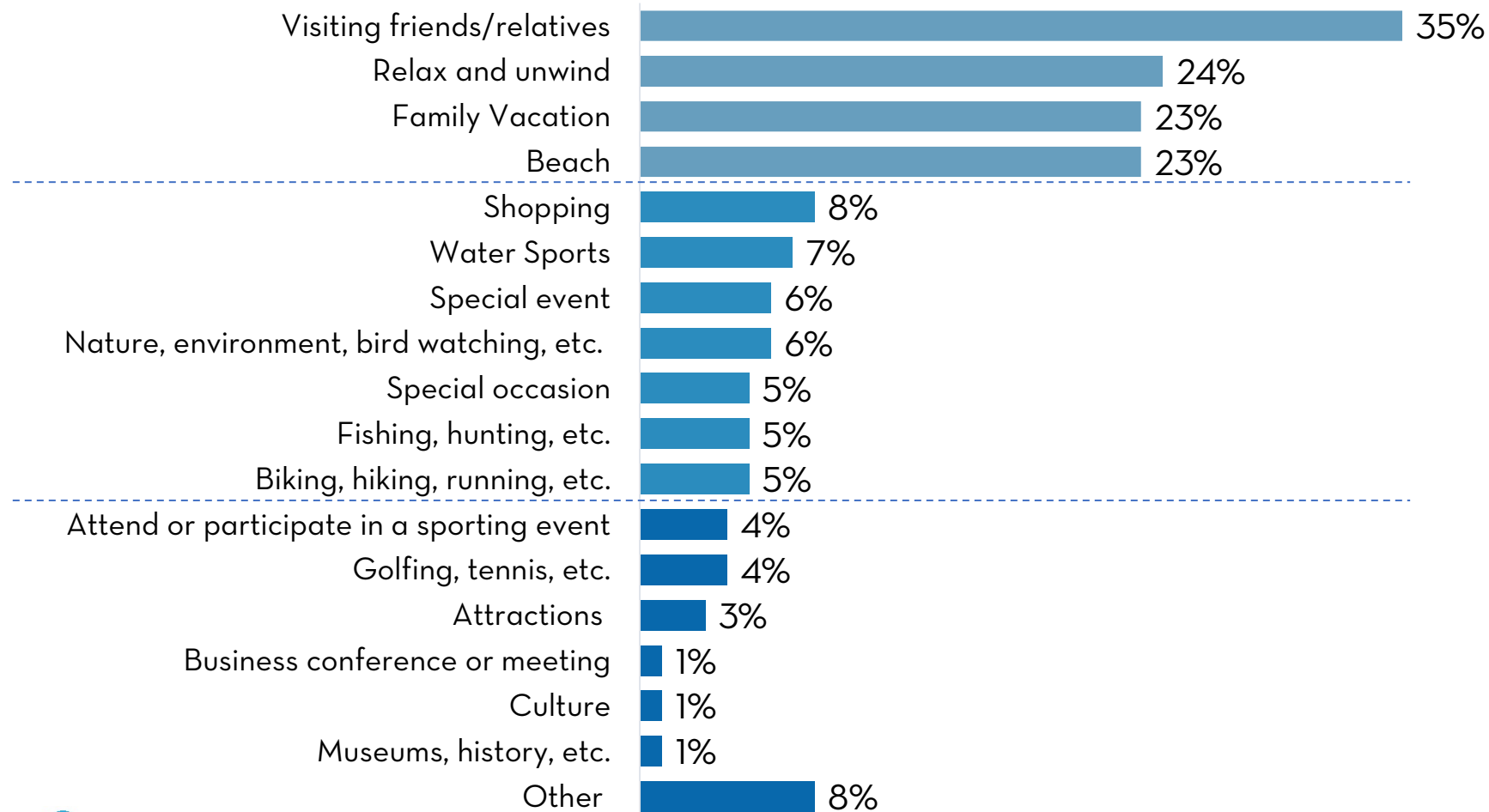
Visitor Transportation

- » **2 in 3** visitors **drove** to Punta Gorda/Englewood Beach (**65%**)
- » **1 in 7** visitors flew into the Punta Gorda Airport (**14%**)
- » **1 in 10** visitors flew into RSW (**11%**)



Reasons for Visiting¹

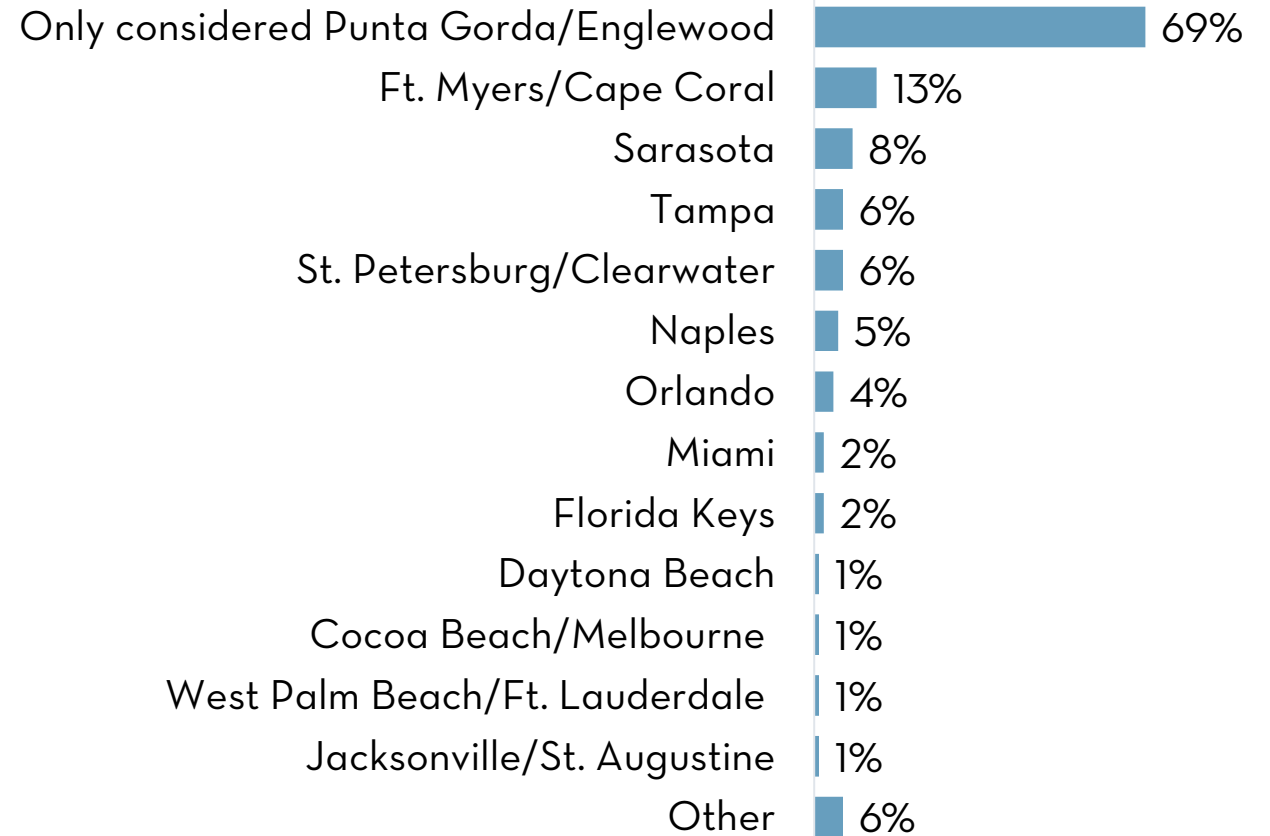
People come to Charlotte County to spend time with family and friends, to relax, enjoy a family vacation and go to the beach



¹Multiple responses permitted.

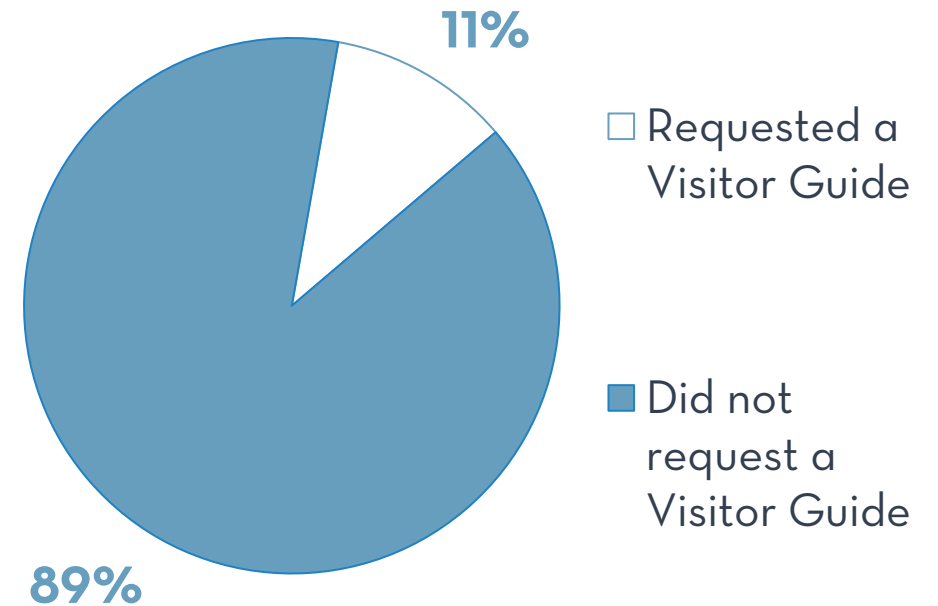
Other Destinations Considered¹

- » **7 in 10** visitors only considered visiting Punta Gorda/Englewood Beach when planning their trip
- » Ft. Myers/Cape Coral and Sarasota are the main competitors with **1 in 5** visitors considering one of these destinations



Visitors Guide

- » **11%** of visitors requested a Visitors Guide before their trip
 - » **5%** requested a print version
 - » **6%** requested an online version
- » Visitors Guide received a rating of **7.8 out of 10.0**¹

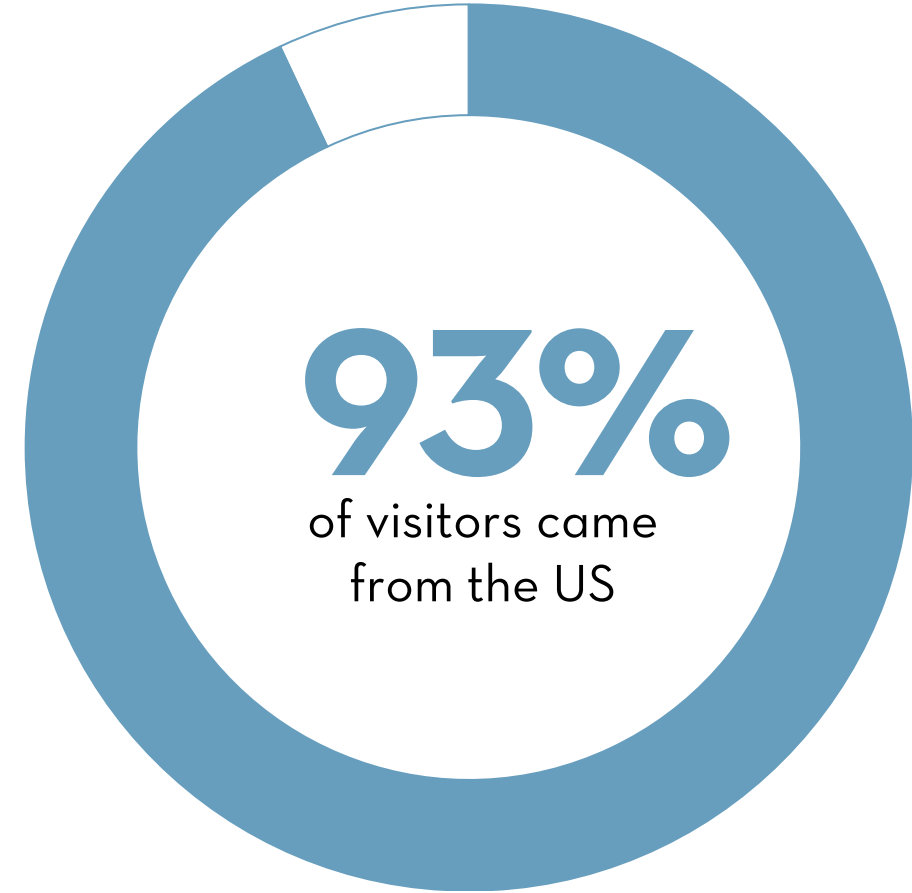
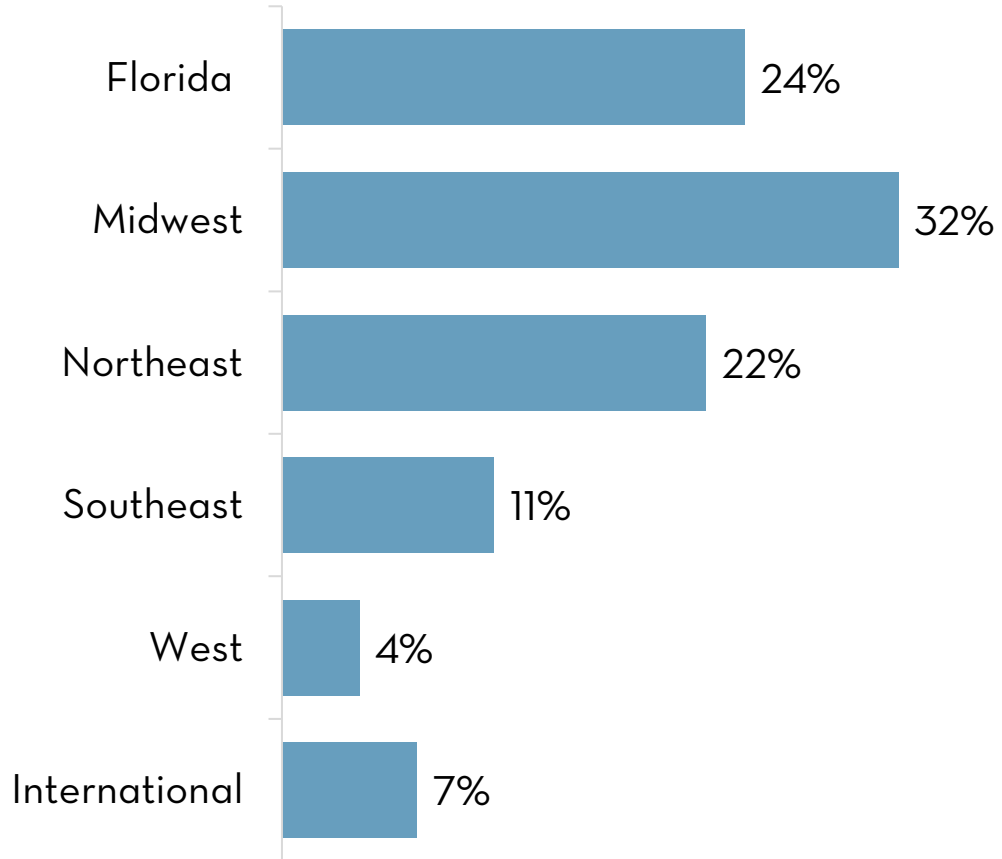


¹Rated on a 10-point scale where 10 is extremely useful and 1 is not at all useful.

Visitor Journey – Traveler Profile



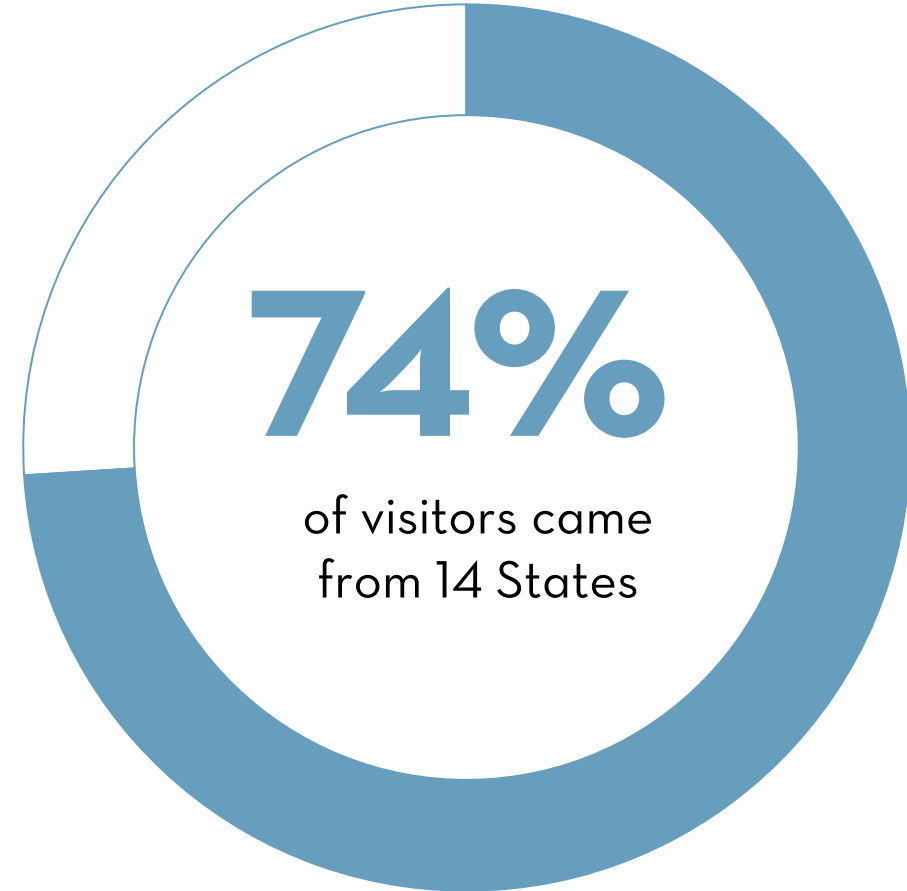
Origin of Visitors¹



¹Top international markets included Canada and the United Kingdom

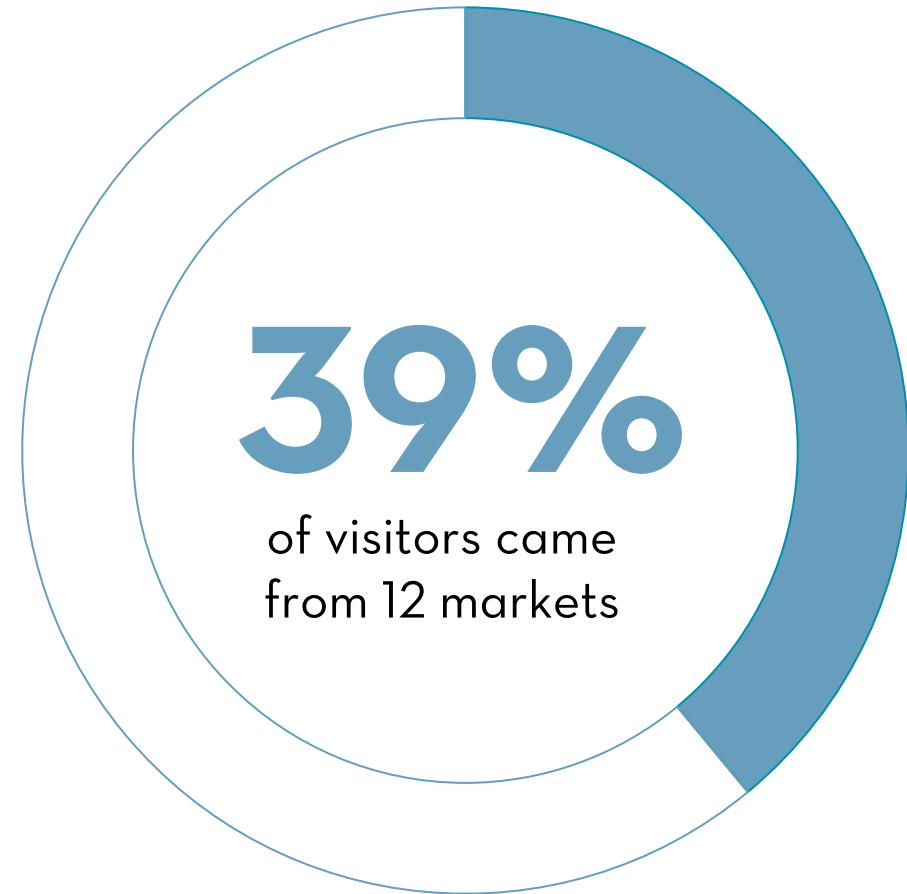
Origin of Visitors

Origin	Percentage of Visitors
Florida	24%
Ohio	7%
Michigan	6%
New York	6%
Illinois	5%
Pennsylvania	4%
Indiana	4%
Massachusetts	3%
Georgia	3%
Wisconsin	3%
Tennessee	3%
Kentucky	2%
New Jersey	2%
Minnesota	2%



Origin of Visitors

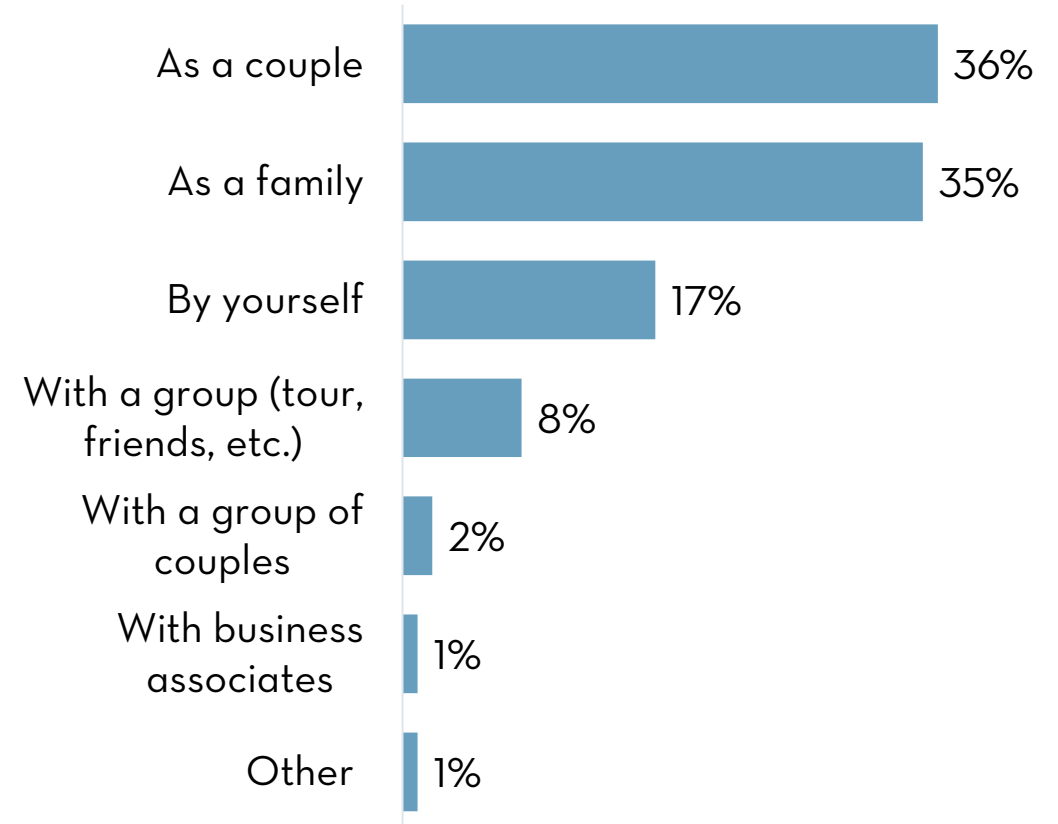
Market	% of Visitors
Naples-Ft. Myers	6%
New York City ¹	5%
Sarasota-Bradenton	5%
Miami-Ft. Lauderdale	3%
Detroit	3%
Orlando	3%
Chicago	3%
Atlanta	3%
Tampa Bay area	2%
Cincinnati	2%
Washington DC-Baltimore	2%
Columbus	2%



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

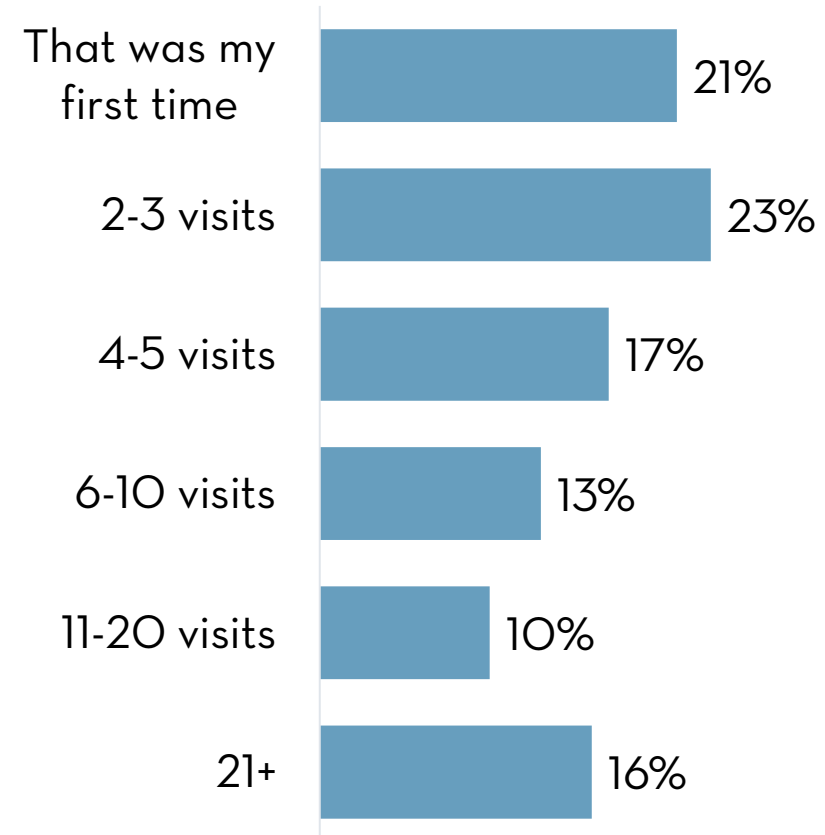
Travel Parties

- » The typical visitor traveled in a party composed of **2.8** people
- » **33%** traveled with children under the age of 20
- » Over **1 in 3** visitors traveled as a couple



Typical Punta Gorda/Englewood Beach Visitor

- » Typical visitors spent **8.5¹** nights in Punta Gorda/Englewood Beach
 - » When including long term visitors², average nights stayed is **18.0**
- » **21%** were first time visitors
- » **26%** had visited more than 10 times

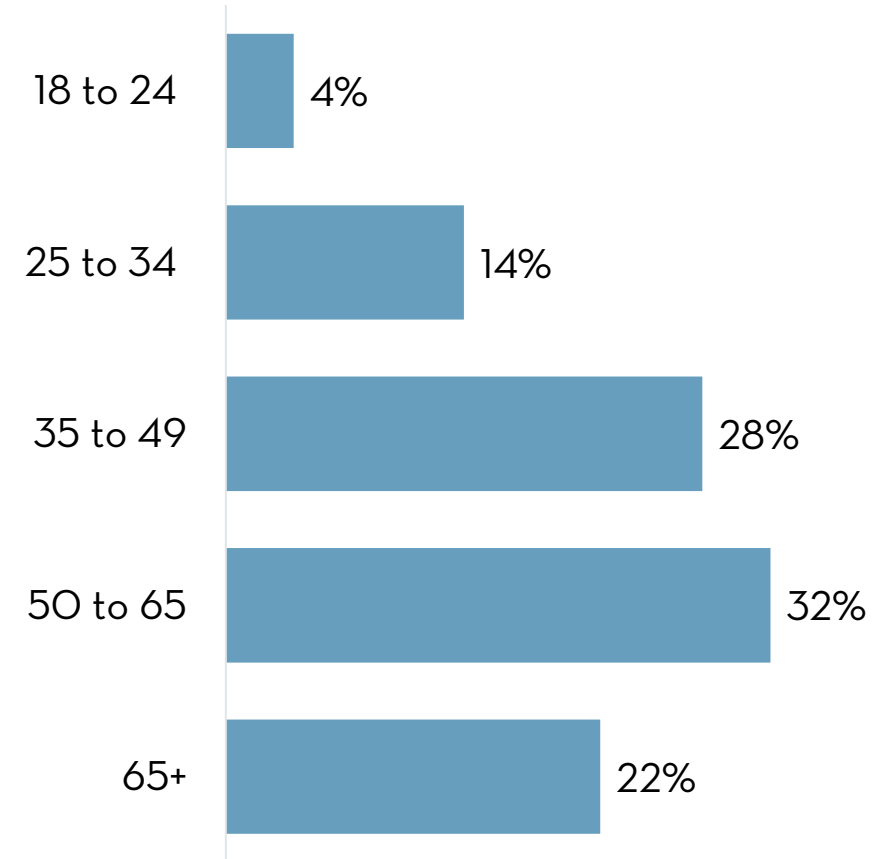


Punta Gorda/Englewood Length of Stay

- » Visitors who stayed in non-paid accommodations spent slightly more time in Charlotte County than the average visitor

	Paid Accommodations	Non-paid Accommodations	Day Trippers	Average
<i>Length of Stay</i>	<i>10.2</i>	<i>10.4</i>	<i>1.0</i>	8.5
<i>Travel Party Size</i>	<i>2.9</i>	<i>2.8</i>	<i>2.7</i>	2.8

» **52** is the median age of visitors in FY2020

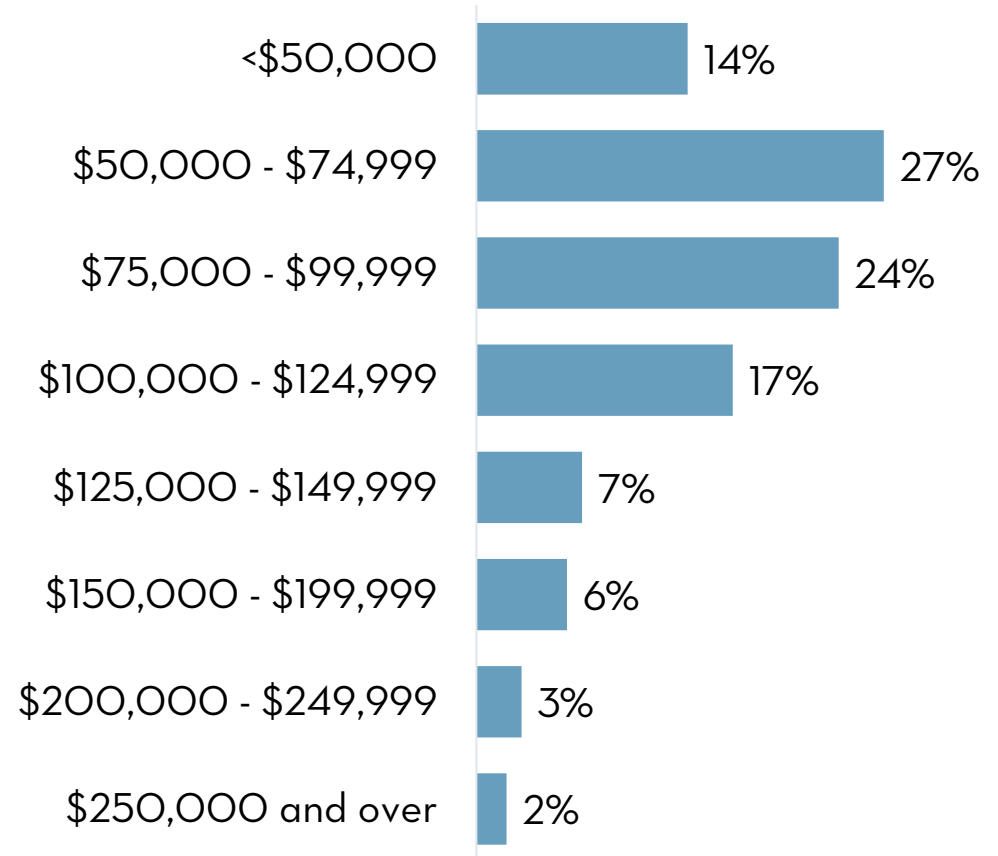


Household Income in FY2020

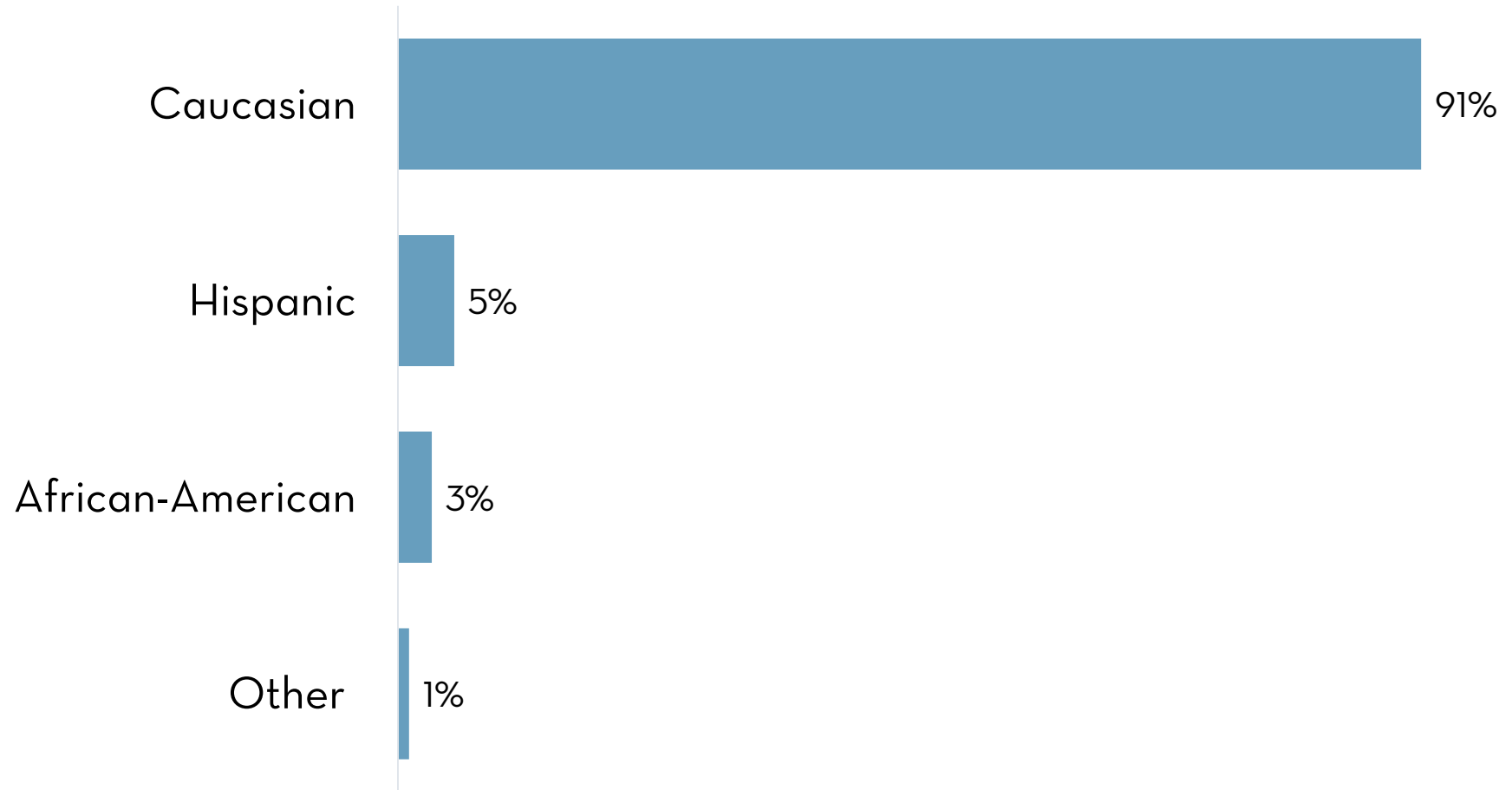
Median Household Income

» **\$84,400** is the median household income for FY2020 visitors

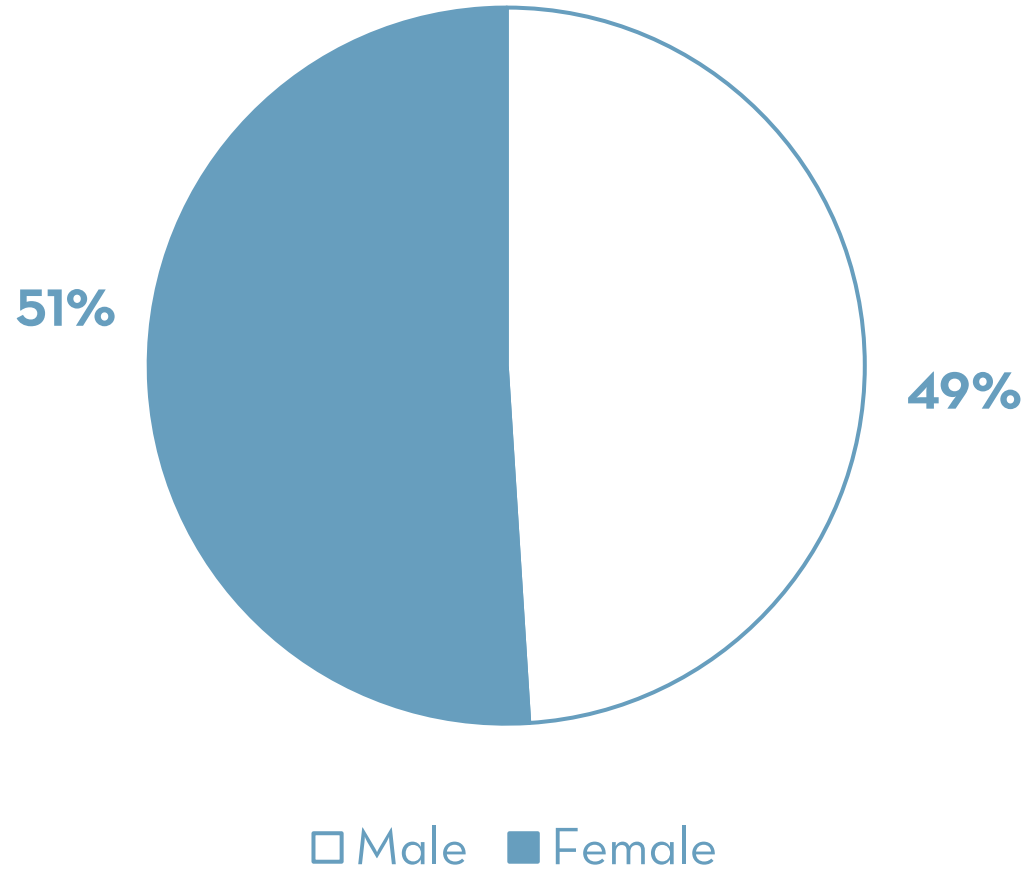
» **1 in 3** visitors had a household income in excess of \$100,000



Race/Ethnicity



Gender

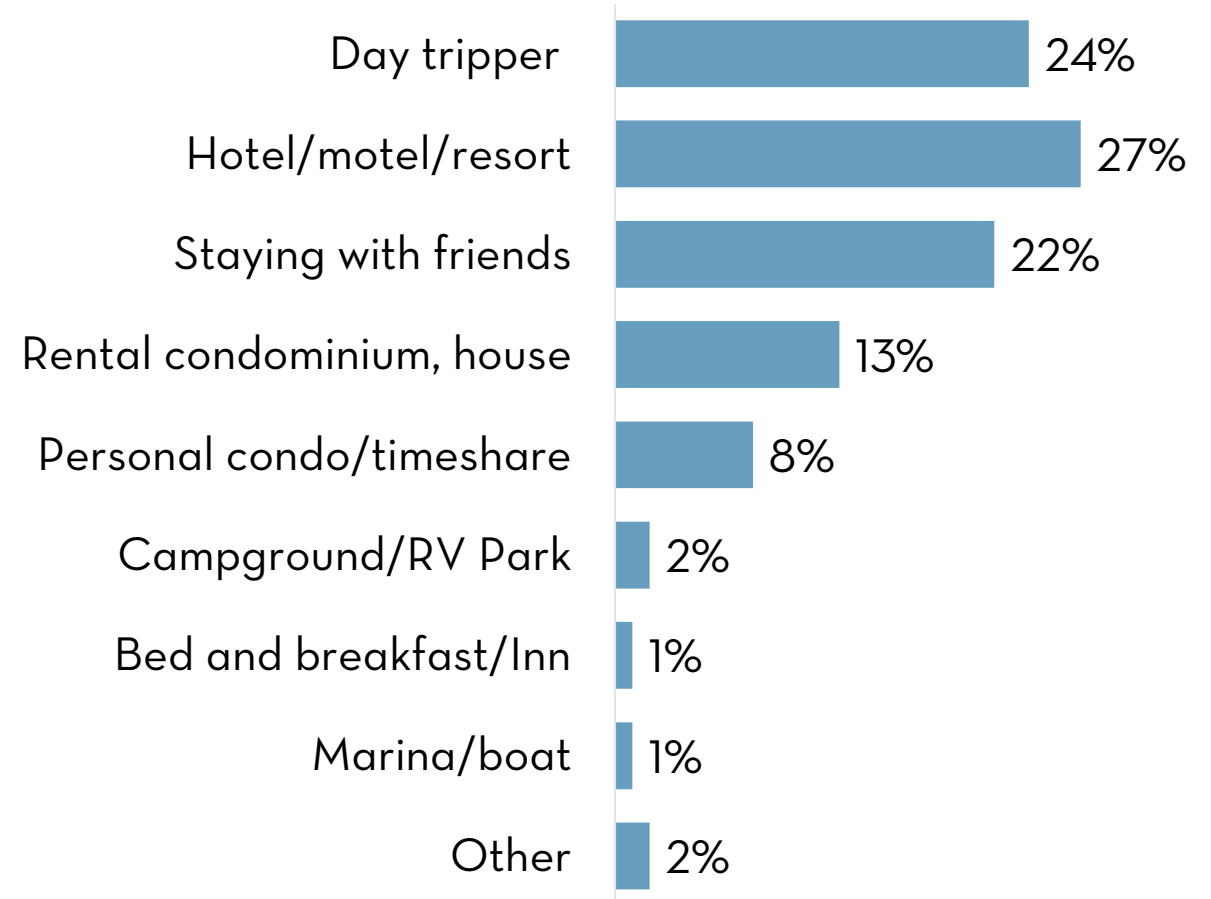


Visitor Journey – Trip Experience

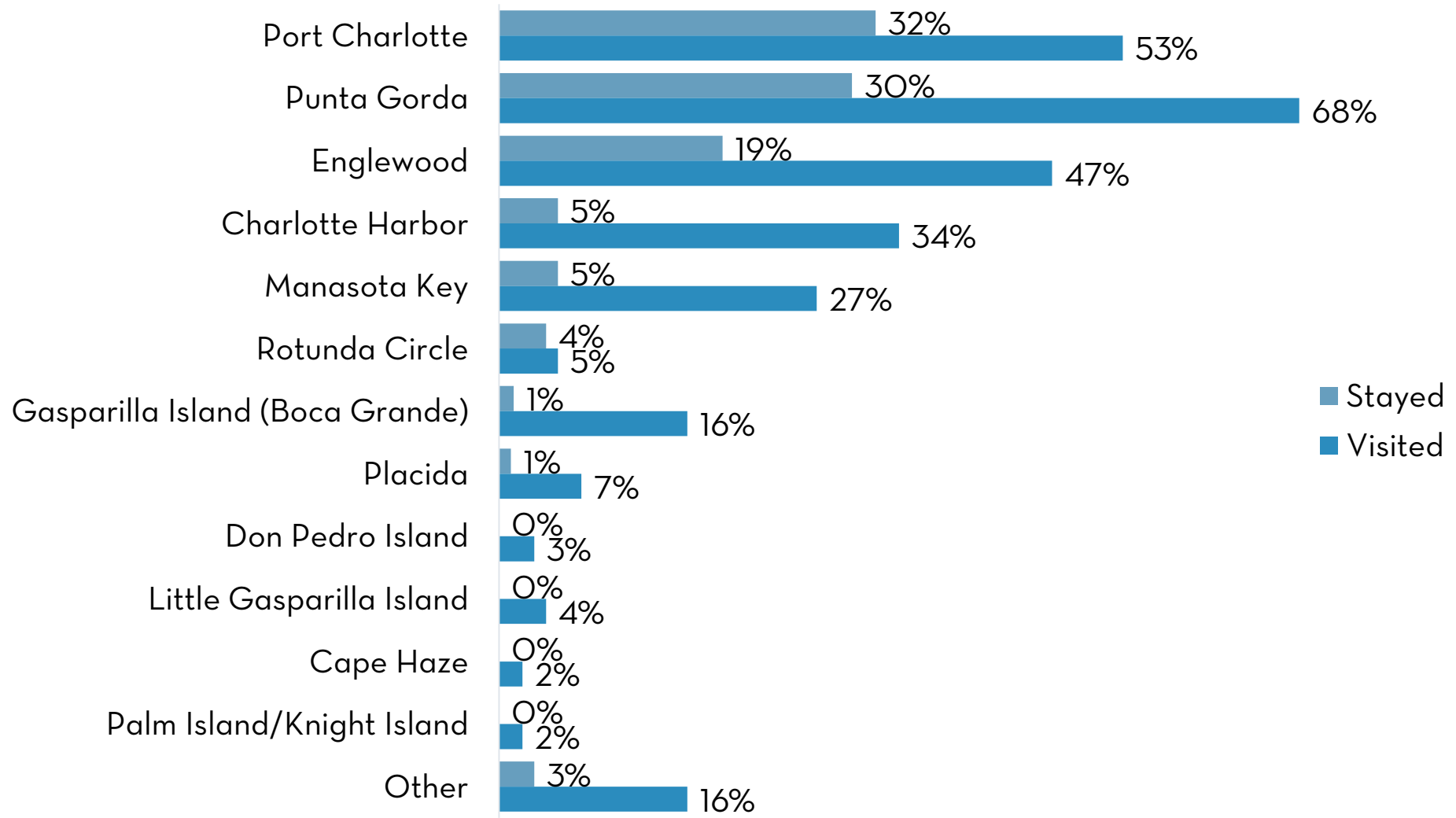


Visitors' Accommodations

- » **76%** of visitors stayed overnight in Punta Gorda/Englewood Beach
- » **1 in 4** visitors stayed in a hotel, motel or resort
- » **1 in 5** stayed with friends or family

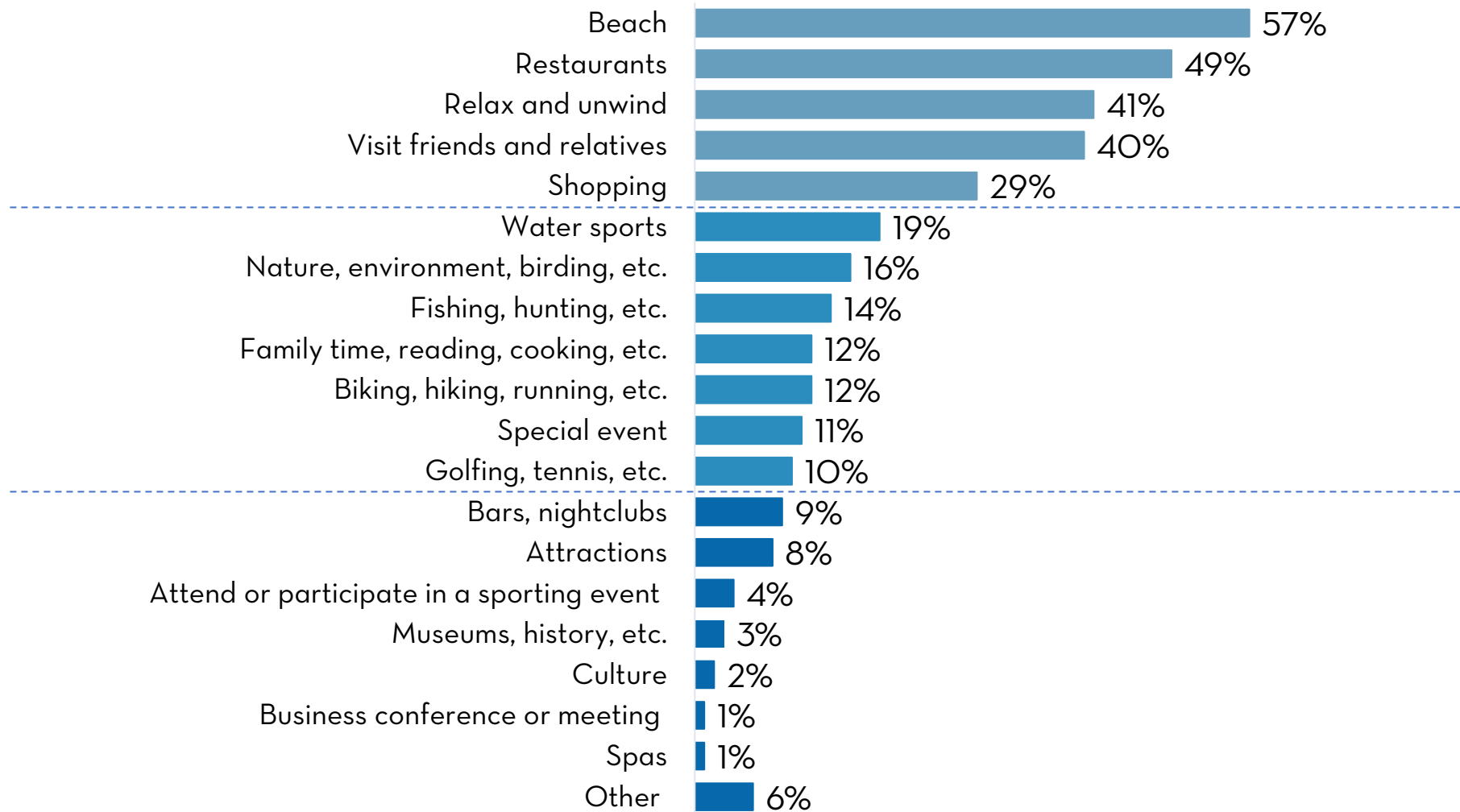


Area Stayed vs. Areas Visited¹



¹Multiple responses permitted.

Visitor Activities¹

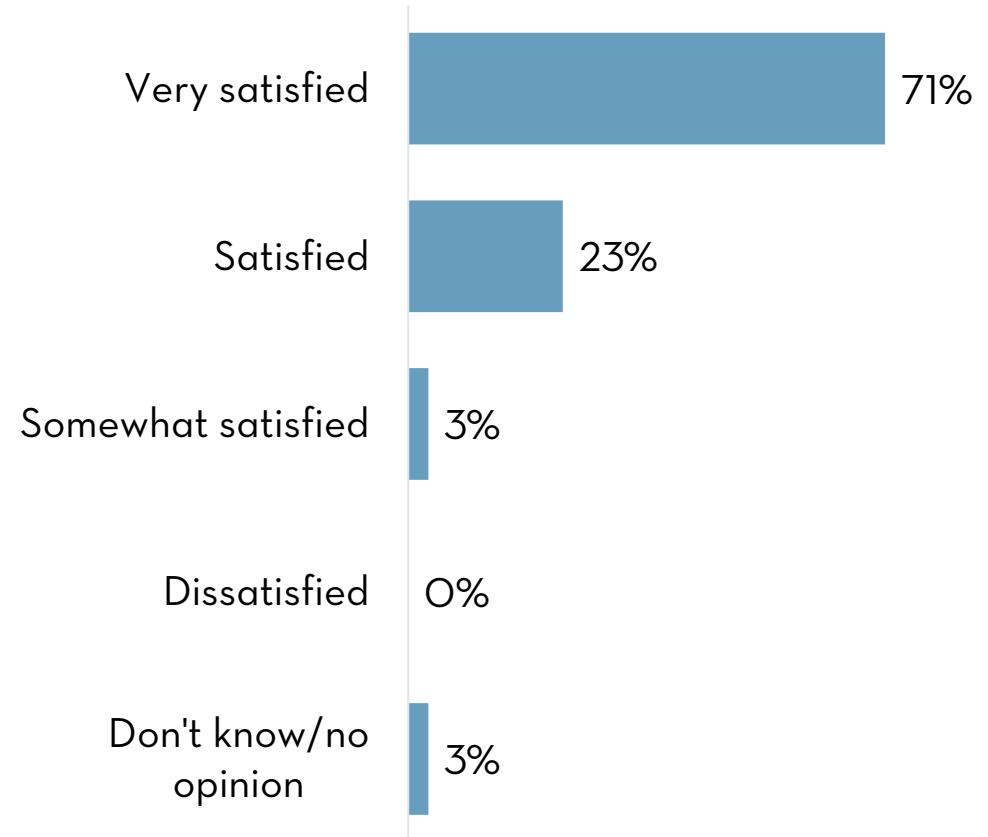


Visitor Journey – Post-Trip Evaluation



Visitor Satisfaction

- » **95%** would recommend Punta Gorda/Englewood Beach to a friend
- » **96%** will return
- » **94%** were satisfied or very satisfied with their stay



Quarterly Comparisons



Quarterly Comparisons

	October - December 2019	January - March 2020	April - June 2020	July - September 2020	FY 2020
Visitors	<i>175,100</i>	<i>164,700</i>	<i>156,100</i>	<i>203,500</i>	699,400
Room Nights	<i>293,080</i>	<i>344,894</i>	<i>191,323</i>	<i>241,300</i>	1,070,597
Direct Spending	<i>\$109,807,000</i>	<i>\$139,421,300</i>	<i>\$83,126,500</i>	<i>\$96,707,600</i>	\$429,062,400
Economic Impact	<i>\$159,220,200</i>	<i>\$202,160,900</i>	<i>\$120,533,400</i>	<i>\$140,226,000</i>	\$622,140,500
ADR	<i>\$111.37</i>	<i>\$155.61</i>	<i>\$119.57</i>	<i>\$124.87</i>	\$127.86
Occupancy Rate	<i>55.3%</i>	<i>68.1%</i>	<i>37.8%</i>	<i>47.7%</i>	52.2%
RevPAR	<i>\$61.61</i>	<i>\$106.05</i>	<i>\$45.20</i>	<i>\$59.56</i>	\$66.74

Quarterly Comparisons

Trip Planning Cycle	October - December 2019	January - March 2020	April - June 2020	July - September 2020	FY 2020
A week or two in advance	21%	12%	23%	28%	21%
A month or so in advance	20%	18%	23%	23%	21%
2 months in advance	16%	17%	20%	19%	18%
3 months in advance	13%	17%	14%	14%	14%
4 to 5 months in advance	8%	15%	10%	7%	10%
6 months or longer	20%	21%	9%	7%	14%
Not sure	2%	0%	1%	2%	1%

Quarterly Comparisons

Saw Advertisement	October - December 2019	January - March 2020	April - June 2020	July - September 2020	FY 2020
Average Visitor	28%	29%	27%	24%	27%
Paid Accommodations	37%	33%	33%	24%	31%
Non-paid Accommodations	23%	26%	16%	24%	22%
Day Tripper	20%	27%	31%	27%	26%

Influenced by Advertisement	October - December 2019	January - March 2020	April - June 2020	July - September 2020	FY 2020
Average Visitor	73%	62%	75%	71%	70%
Paid Accommodations	80%	77%	82%	75%	78%
Non-paid Accommodations	66%	43%	64%	77%	63%
Day Tripper	84%	83%	72%	64%	75%

Quarterly Comparisons

Visitor Guide	October - December 2019	January - March 2020	April - June 2020	July - September 2020	FY 2020
Requested a Visitors Guide	9%	9%	13%	13%	11%
Requested a print version	5%	5%	4%	7%	5%
Requested an online version	4%	4%	9%	6%	6%
Visitor Guide Rating	7.6	7.8	8.3	7.7	7.8

	October - December 2019	January - March 2020	April - June 2020	July - September 2020	FY 2020
Drove to Charlotte	54%	55%	78%	71%	65%
1st Time Visitors	20%	22%	16%	26%	21%
11+ Visits to Charlotte	29%	19%	31%	23%	26%

Quarterly Comparisons

Main Reason	October - December 2019	January - March 2020	April - June 2020	July - September 2020	FY 2020
Visiting friends/relatives	33%	42%	32%	32%	35%
Relax and unwind	28%	18%	28%	23%	24%
Family vacation	21%	21%	30%	22%	23%
Beach	26%	15%	33%	18%	23%
Shopping	10%	2%	16%	5%	8%
Water sports	6%	1%	14%	6%	7%
Special events	12%	3%	2%	6%	6%
Nature, environment, etc.	9%	4%	9%	3%	6%
Special occasion	4%	2%	6%	6%	5%
Fishing, hunting, etc.	4%	2%	10%	3%	5%
Biking, hiking, running, etc.	6%	3%	9%	2%	5%
Sporting event	1%	3%	1%	8%	4%
Golfing, tennis	8%	1%	4%	2%	4%
Attractions	6%	1%	5%	1%	3%

Quarterly Comparisons

Region	October - December 2019	January - March 2020	April - June 2020	July - September 2020	FY 2020
Southeast	29%	18%	35%	54%	35%
Midwest	32%	44%	13%	21%	32%
Northeast	24%	26%	24%	17%	22%
West	3%	2%	5%	6%	4%
International	12%	10%	3%	2%	7%

State	October - December 2019	January - March 2020	April - June 2020	July - September 2020	FY 2020
Florida	22%	10%	22%	37%	24%
Ohio	7%	11%	5%	4%	7%
Michigan	6%	8%	6%	3%	6%
New York	5%	7%	8%	3%	6%
Pennsylvania	5%	5%	5%	3%	5%

Quarterly Comparisons

Market	October - December 2019	January - March 2020	April - June 2020	July - September 2020	FY 2020
Naples-Ft. Myers	8%	4%	6%	7%	6%
Sarasota	5%	4%	4%	5%	5%
New York City	4%	3%	7%	5%	5%
Detroit	3%	3%	3%	3%	3%
Chicago	2%	1%	6%	2%	3%
Miami-Ft. Lauderdale	2%	1%	3%	6%	3%
Atlanta	1%	1%	3%	5%	3%
Orlando	1%	1%	2%	6%	3%

Quarterly Comparisons

	October - December 2019	January - March 2020	April - June 2020	July - September 2020	FY 2020
Travel party size	2.6	2.5	3.3	2.9	2.8
Traveled with children	23%	20%	44%	44%	33%
Length of Stay	7.7	12.5	8.1	6.1	8.5

	October - December 2019	January - March 2020	April - June 2020	July - September 2020	FY 2020
Median Age	57	59	48	44	52
Gender (Female)	49%	49%	58%	49%	51%
Median Income	\$81,800	\$76,100	\$98,800	\$83,900	\$84,400

Quarterly Comparisons

Visitor Accommodations	October - December 2019	January - March 2020	April - June 2020	July - September 2020	FY 2020
<i>Hotel/motel/resort</i>	<i>21%</i>	<i>17%</i>	<i>39%</i>	<i>30%</i>	27%
<i>Day Tripper</i>	<i>26%</i>	<i>13%</i>	<i>26%</i>	<i>30%</i>	24%
<i>Staying with friends</i>	<i>23%</i>	<i>33%</i>	<i>13%</i>	<i>21%</i>	22%
<i>Rental condo, house</i>	<i>16%</i>	<i>18%</i>	<i>12%</i>	<i>9%</i>	13%
<i>Personal condo/timeshare</i>	<i>9%</i>	<i>17%</i>	<i>6%</i>	<i>3%</i>	8%
<i>Campground/ RV park</i>	<i>3%</i>	<i>2%</i>	<i>1%</i>	<i>1%</i>	2%
<i>Bed and Breakfast/Inn</i>	<i>0%</i>	<i>0%</i>	<i>2%</i>	<i>1%</i>	1%
<i>Marina/boat</i>	<i>1%</i>	<i>0%</i>	<i>1%</i>	<i>0%</i>	1%

Quarterly Comparisons

Visitor Activities	October - December 2019	January - March 2020	April - June 2020	July - September 2020	FY 2020
Beach	59%	68%	60%	44%	57%
Restaurants	50%	57%	49%	40%	49%
Relax and unwind	44%	43%	39%	38%	41%
Visit friends and relatives	37%	42%	38%	42%	40%
Shopping	27%	32%	34%	23%	29%
Water sports	14%	16%	29%	19%	19%
Nature, environment, etc.	15%	19%	17%	14%	16%
Fishing, hunting, etc.	13%	14%	18%	12%	14%
Family time	16%	7%	13%	12%	12%
Biking, hiking, running, etc.	12%	15%	14%	9%	12%
Special event	16%	10%	7%	9%	11%
Golfing, tennis, etc.	12%	13%	10%	7%	10%
Bars, nightclubs	12%	9%	10%	6%	9%
Attractions	12%	8%	8%	5%	8%

Quarterly Comparisons

	October - December 2019	January - March 2020	April - June 2020	July - September 2020	FY 2020
<i>Will recommend</i>	95%	96%	96%	94%	95%
<i>Will return</i>	97%	98%	95%	95%	96%
<i>Very Satisfied + Satisfied</i>	95%	98%	94%	92%	94%

Methodology

Visitor Tracking Study

- » **2,166** interviews were completed with Charlotte County visitors in-person and online between October 1st, 2019 and September 30th, 2020.



Economic Impact Study

- » Economic impact of tourism for Punta Gorda/Englewood Beach VCB was based on data from the following sources:
 - » 2,166 interviews conducted by Downs & St. Germain Research with visitors to Charlotte County
 - » Twelve (12) monthly STR And All the Rooms 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

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

October 2019 – September 2020

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