



THE BEACHES OF **FORT MYERS AND SANIBEL**

Consumer Sentiment Study
March 17th, 2021

Presented by Downs & St. Germain Research



THE BEACHES OF
**FORT MYERS
AND SANIBEL**

DS downs & st. germain
RESEARCH



THE BEACHES OF **FORT MYERS AND SANIBEL**

Introduction

Study Purpose & Research Methods

● Study Purpose

Determine the impact of COVID-19 on consumers' feelings about travel and travel-related advertising. This is the 9th wave of multiple waves of the survey to see how consumer sentiment changes over time.

● Research Methods

Online surveys with 450 consumers in Atlanta, the Tampa Bay area, Miami - Ft. Lauderdale, New York City, Chicago, Boston, Cincinnati, Indianapolis, and Minneapolis.*

- Wave 1 - April 17 & 18, 2020
- Wave 2 - May 7 & 8, 2020
- Wave 3 - June 8 & 9, 2020
- Wave 4 - July 10 & 11, 2020
- Wave 5 - August 12 & 13, 2020
- Wave 6 - October 14 & 15, 2020
- Wave 7 - November 30 & December 1, 2020
- Wave 8 - January 5 - 7, 2021
- Wave 9 - February 24 & 25, 2021

Consumers were adults age 21+ who earned at least \$75,000 per year in household income, served as key decision-makers in where their households take vacations, and had stayed in paid accommodations during a trip or vacation in 2020.

*Waves 1 - 5 included consumers in West Palm Beach and Orlando, and excluded consumers in Boston, Cincinnati, Indianapolis, and Minneapolis.





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Key Differences from Previous Waves



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Key Differences:

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In February, we begin to see the light at the end of the tunnel for travel. Consumer sentiment has taken a turn for the better, and we can see their hopeful attitudes in the following ways:

- Significantly more consumers feel it is safe to vacation again and feel safer traveling than they did a month ago – **these increases are the largest that have been seen since the inception of this study**
- Significantly more consumers **have vacations planned** in the near future – **over 4 in 5 consumers**
- For the first time since the inception of this study, consumers are using the words **excited, safe, and ready** more than unfavorable words/phrases
- The top advertising theme/message to motivate consumers to visit was **future experiences**, outpacing messages of safety for the first time



Key Differences:

6

- 1 in 4 consumers have received the **COVID-19 vaccine***, **nearly 3 in 5** consumers plan on getting it **as soon as possible**, a slight increase from January
- Consumer willingness to **fly short/direct flights continues to increase** and **outpaces the preference to drive** to destinations
- **Leisure trips** continue to be the primary purpose for travel, although business travel has increased since January
- Interest in visiting the **Ft. Myers-Sanibel-Captiva** area **increased**
- **Nearly half of** consumers hosted friends and family in their homes in the past month, a significant increase from January



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Detailed Findings



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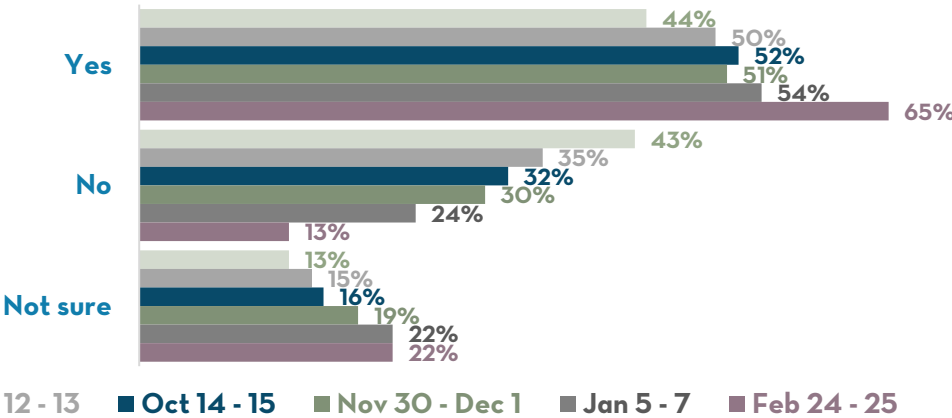
Opinions on Travel Safety

Nearly 2 in 3 consumers feel it is **safe to vacation** again, a significant increase from January

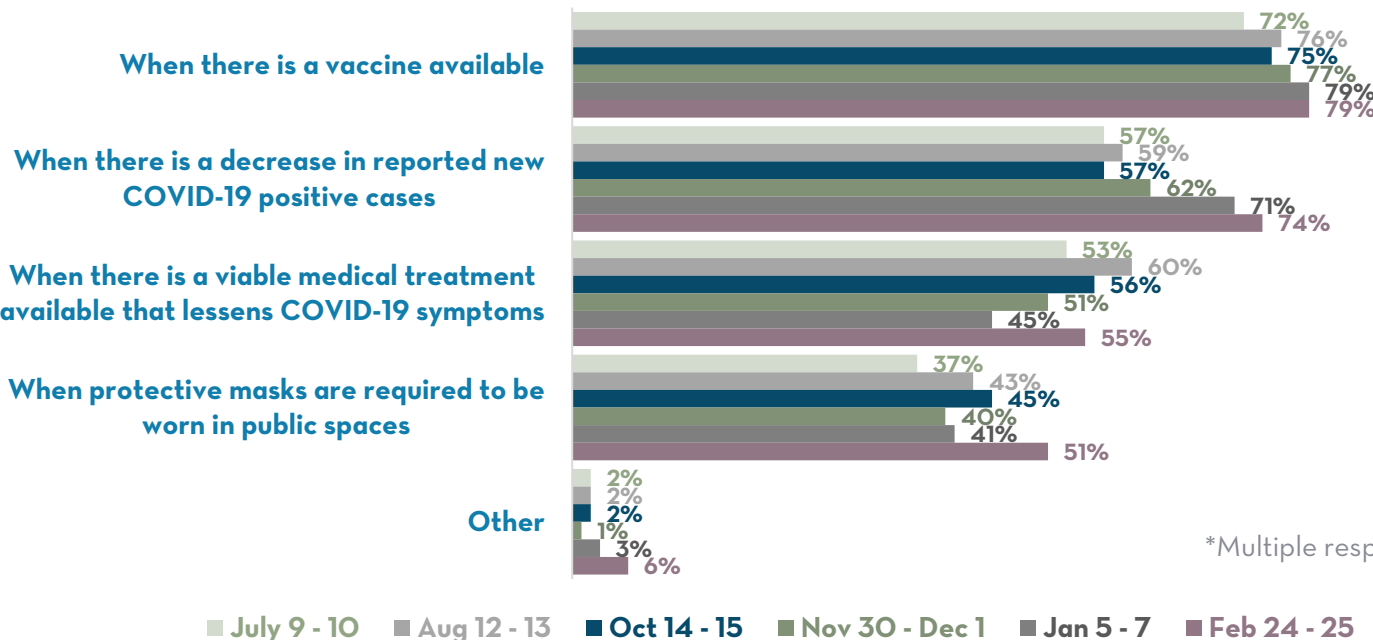
Consumers who do not feel safe traveling continue to rely on **availability of a viable vaccine** to determine when it is safe to travel again

In February, more consumers will feel safe to travel when protective masks are worn in public spaces

NOW THAT MANY BEACHES, RESTAURANTS, ATTRACTIONS, ETC., ARE OPEN OR WILL BE OPENING SOON, DO YOU FEEL IT IS SAFE TO VACATION AGAIN?



IN YOUR OPINION, IT WILL BE SAFE TO TRAVEL AGAIN WHEN....*



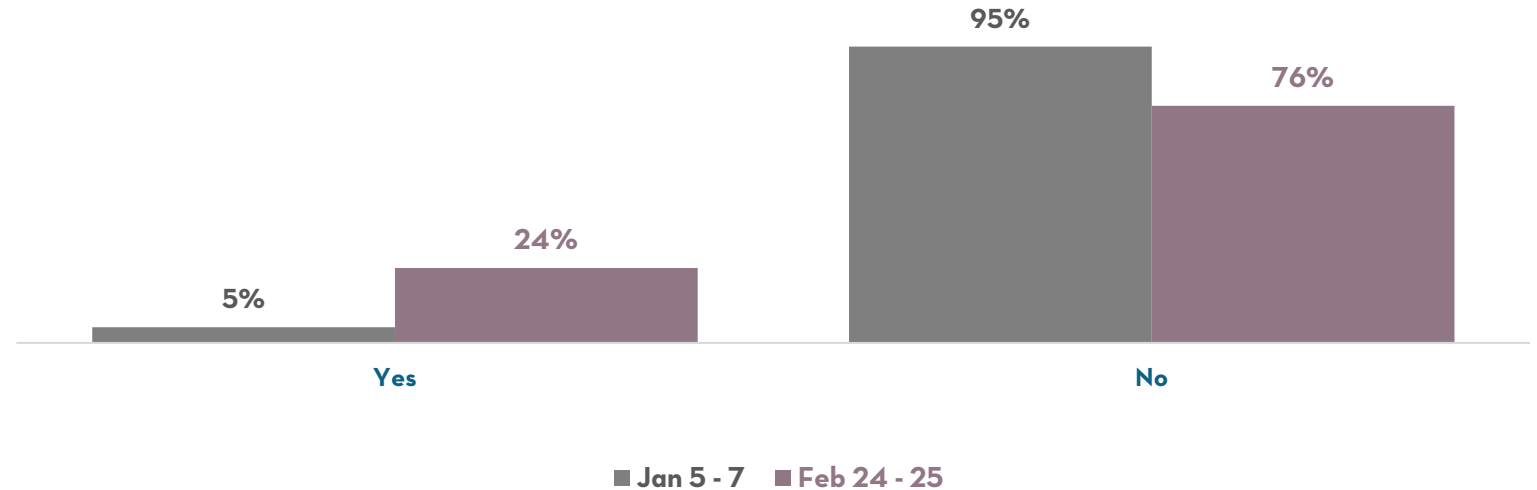
*Multiple responses permitted.

COVID-19 Vaccine

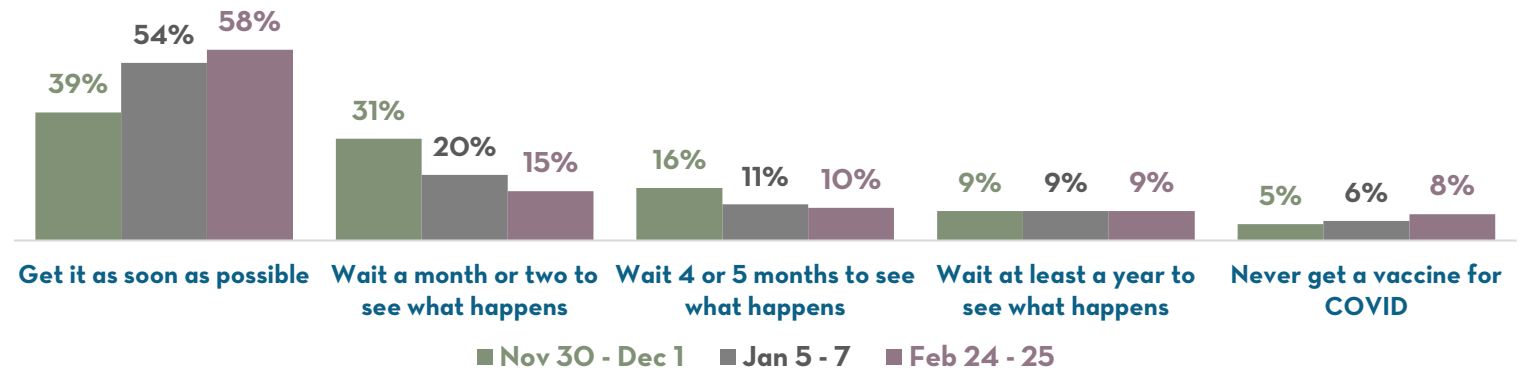
1 in 4 consumers has received the COVID-19 vaccine

When a **vaccine for COVID-19** becomes available to them, **nearly 3 in 5 of consumers will get it as soon as they can**, up slightly from January

HAVE YOU RECEIVED THE COVID-19 VACCINE?



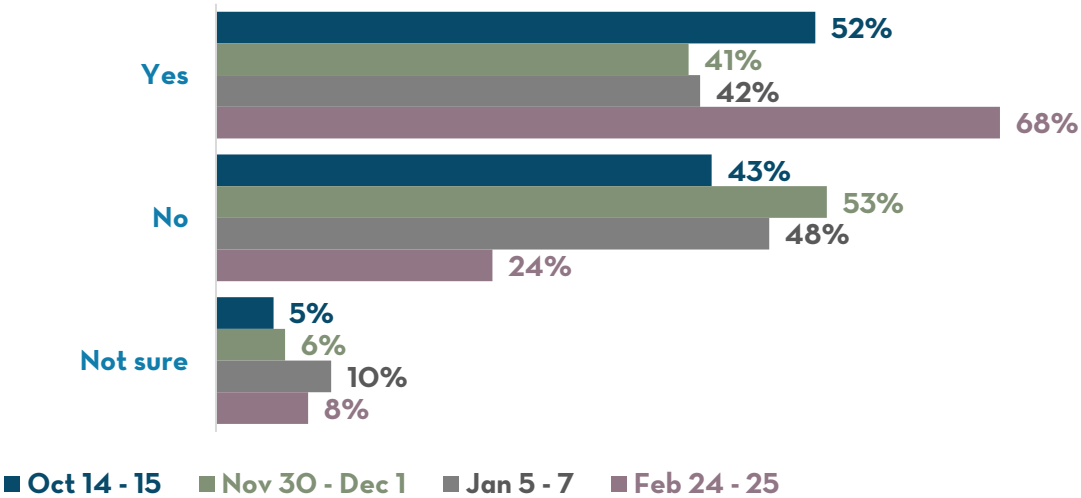
ONCE A VACCINE FOR COVID-19 IS AVAILABLE TO YOU, WILL YOU:



Opinions on Travel Safety

In February, more than 2 in 3 consumers feel safer traveling now than they did a month ago

DO YOU FEEL SAFER TRAVELING NOW THAN YOU DID A MONTH AGO?



*Multiple responses permitted.

Current Associations with Travel

In February, consumers used more positive words such as **excited**, **safe**, and **ready** to express their feelings about travel right now

Although consumers continue to use words such as **unsafe** and **scared**, they seem to be more optimistic with their uncertainty using words like **tentative + cautious**



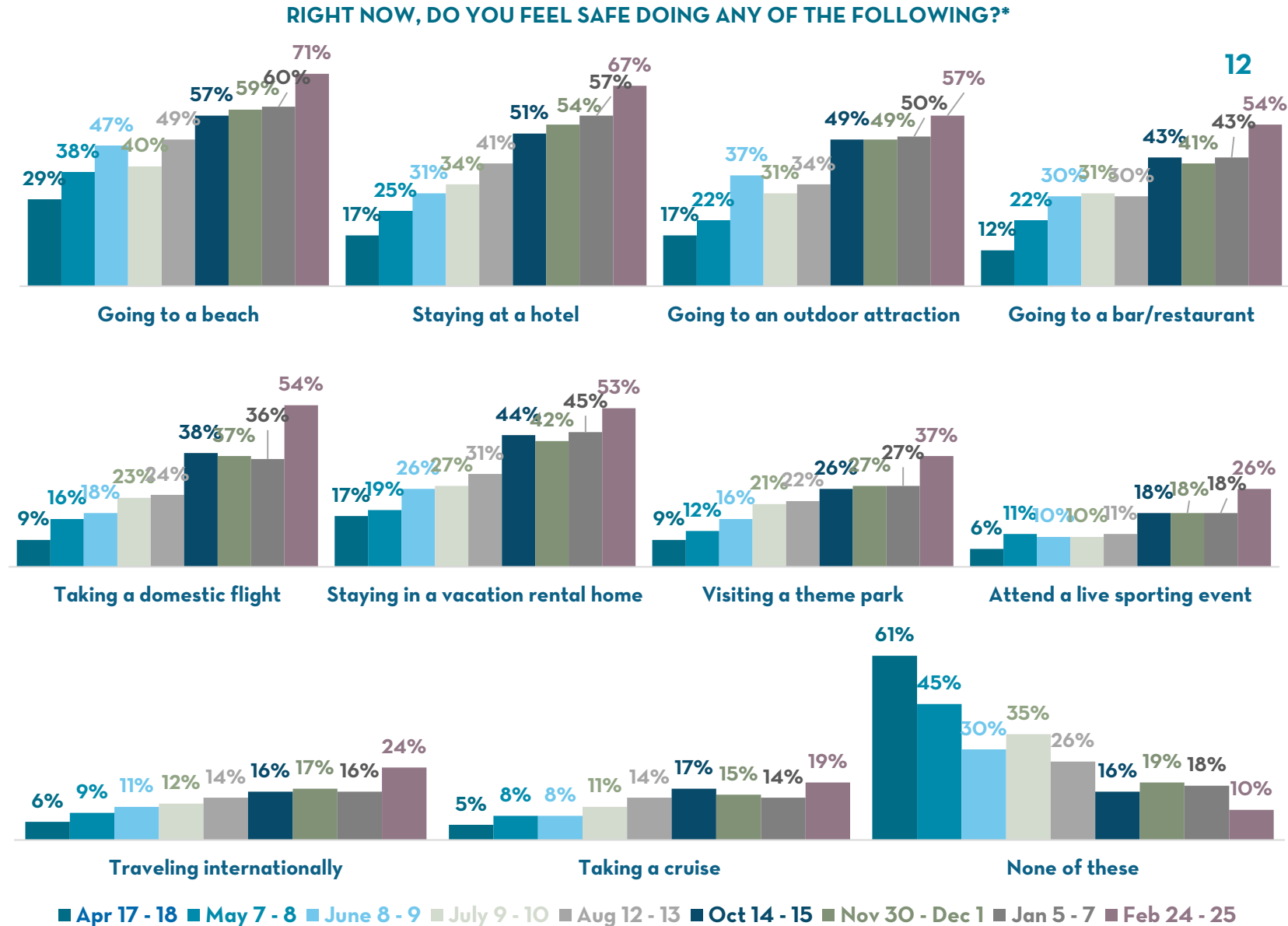
WHAT ONE WORD OR PHRASE BEST DESCRIBES HOW YOU FEEL ABOUT TRAVEL RIGHT NOW?



Perception of Safety in Travel Activities

Overall, **consumer confidence** in all activities in February has increased from January

7 in 10 consumers feel safe **going to a beach** and 2 in 3 consumers feel safe **staying at a hotel**



*Multiple responses permitted.

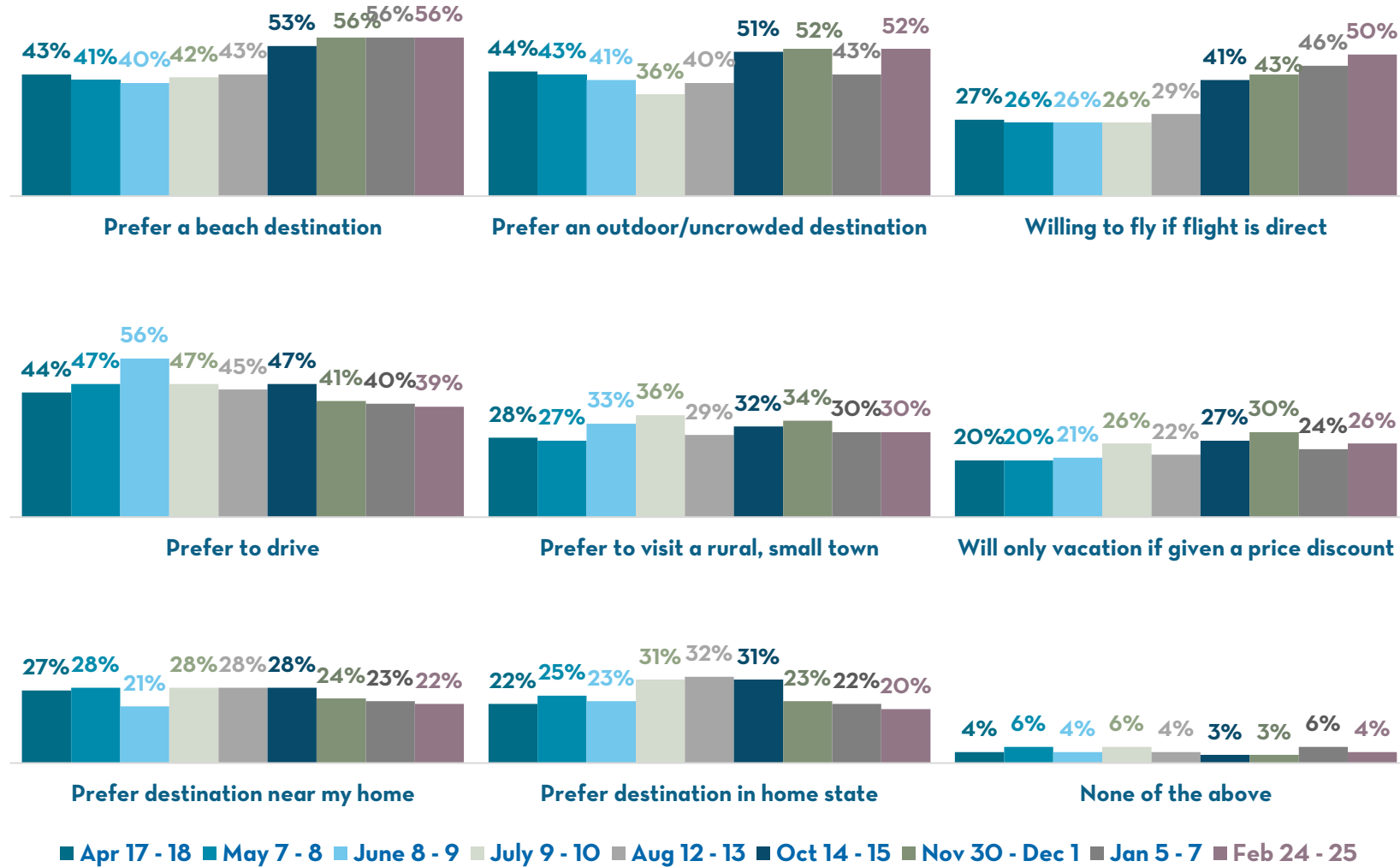
Travel Preferences after COVID-19

Beaches are the most preferred destination

Consumer willingness to fly **short/direct flights** is steadily increasing, and continues to outpace the preference to drive

ONCE YOU FEEL IT IS SAFE TO TRAVEL AGAIN, CHECK EACH YOU AGREE WITH:*

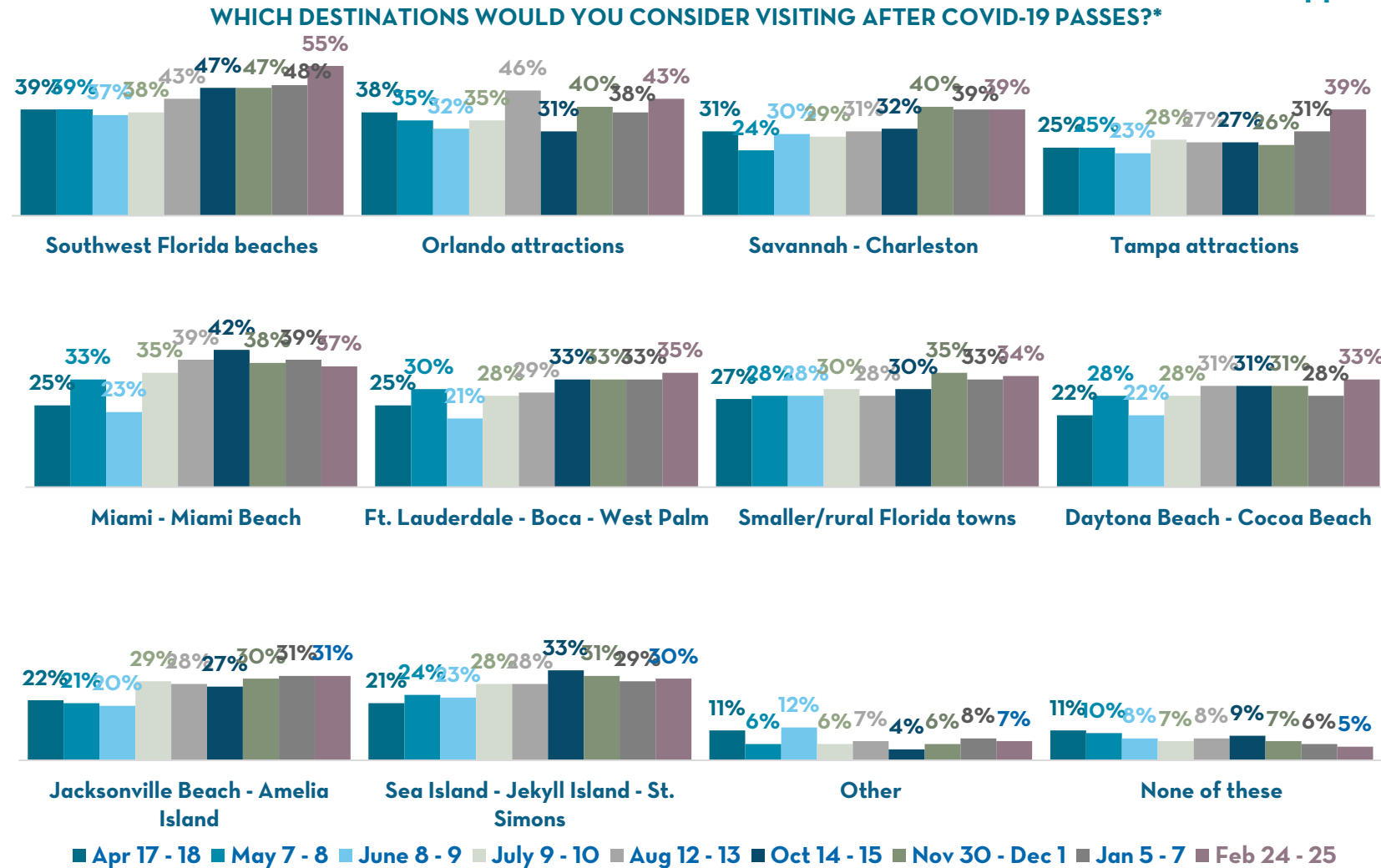
13



*Multiple responses permitted.

Travel Destinations to Consider after COVID-19

Interest in visiting **Southwest Florida beaches** increased in February



*Multiple responses permitted.

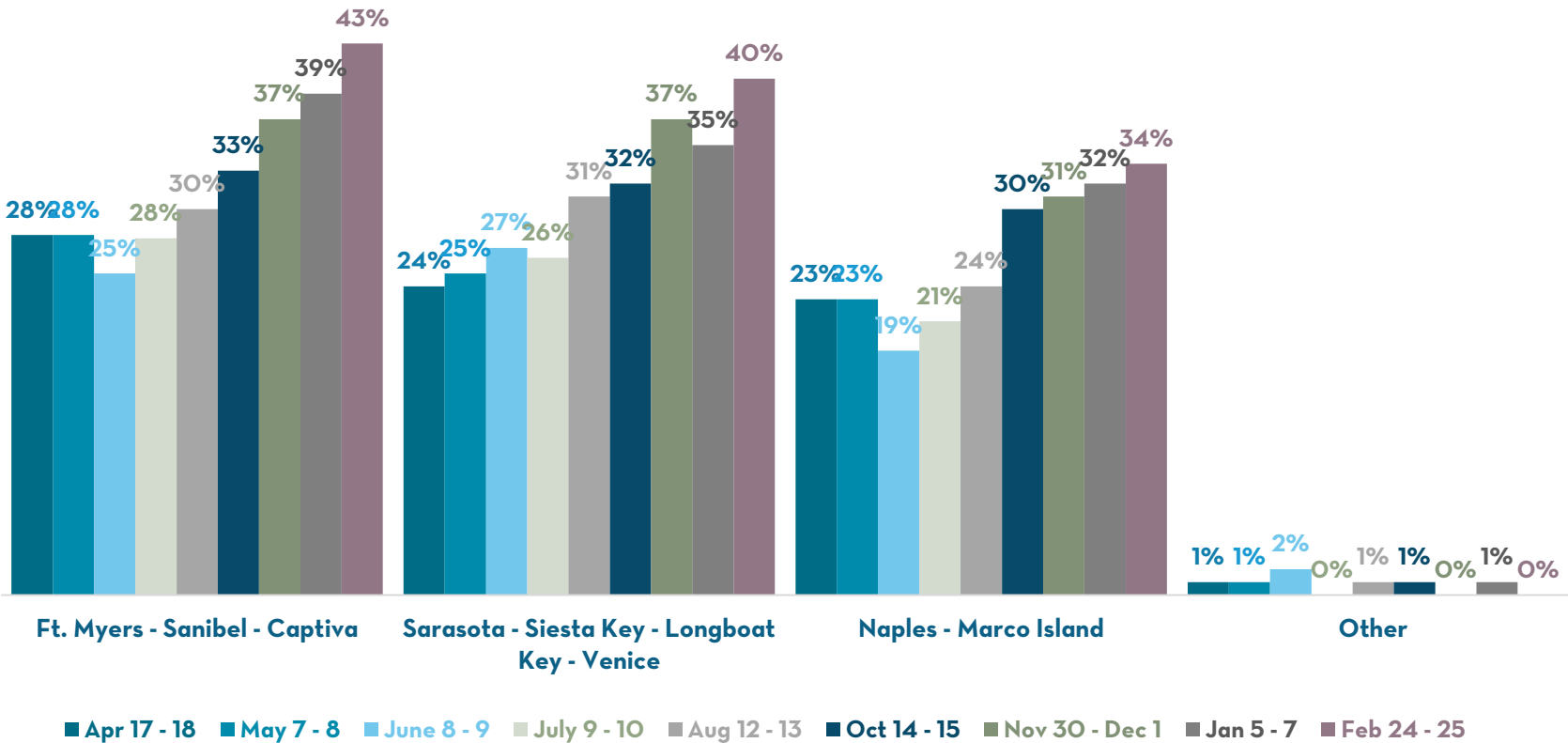
Southwest Florida Beach Areas Considered

Interest in visiting the **Ft. Myers-Sanibel-Captiva area** continued to increase in February; **over 2 in 5 consumers** say they **will consider visiting the area**



WHICH SOUTHWEST FLORIDA BEACH AREAS WOULD YOU CONSIDER VISITING?*

Base: 55% who will visit SW Florida Beaches



*Multiple responses permitted.

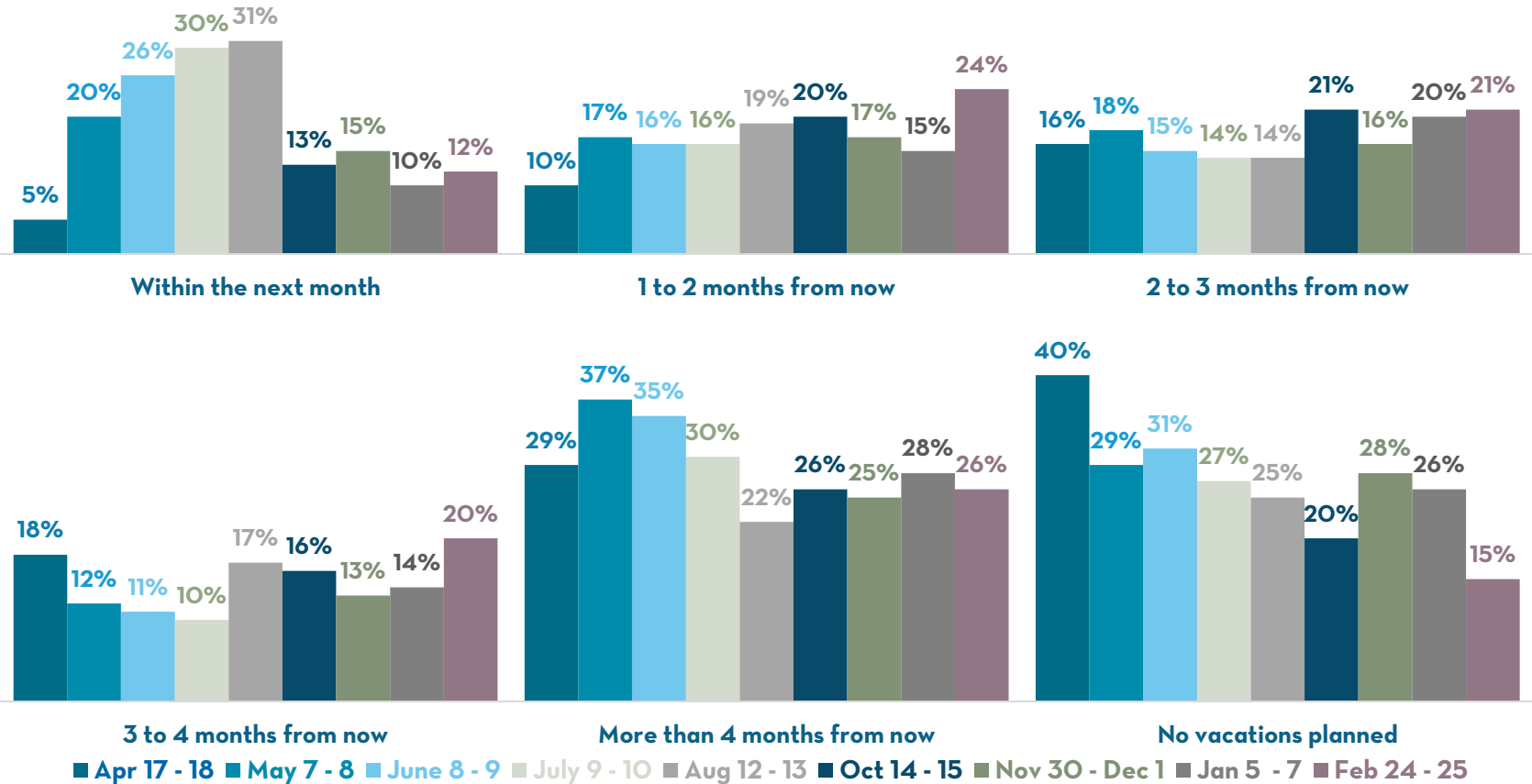
Planned Vacations & Long Getaways

Over 4 in 5 consumers have at least one vacation planned, the highest percentage since the inception of this study

1 in 3 consumers have begun planning a vacation within the next two months, an increase from January



HAVE YOU BEGUN PLANNING A VACATION OR LONG GETAWAY FOR ANY OF THE FOLLOWING TIMEFRAMES?*



*Multiple responses permitted.

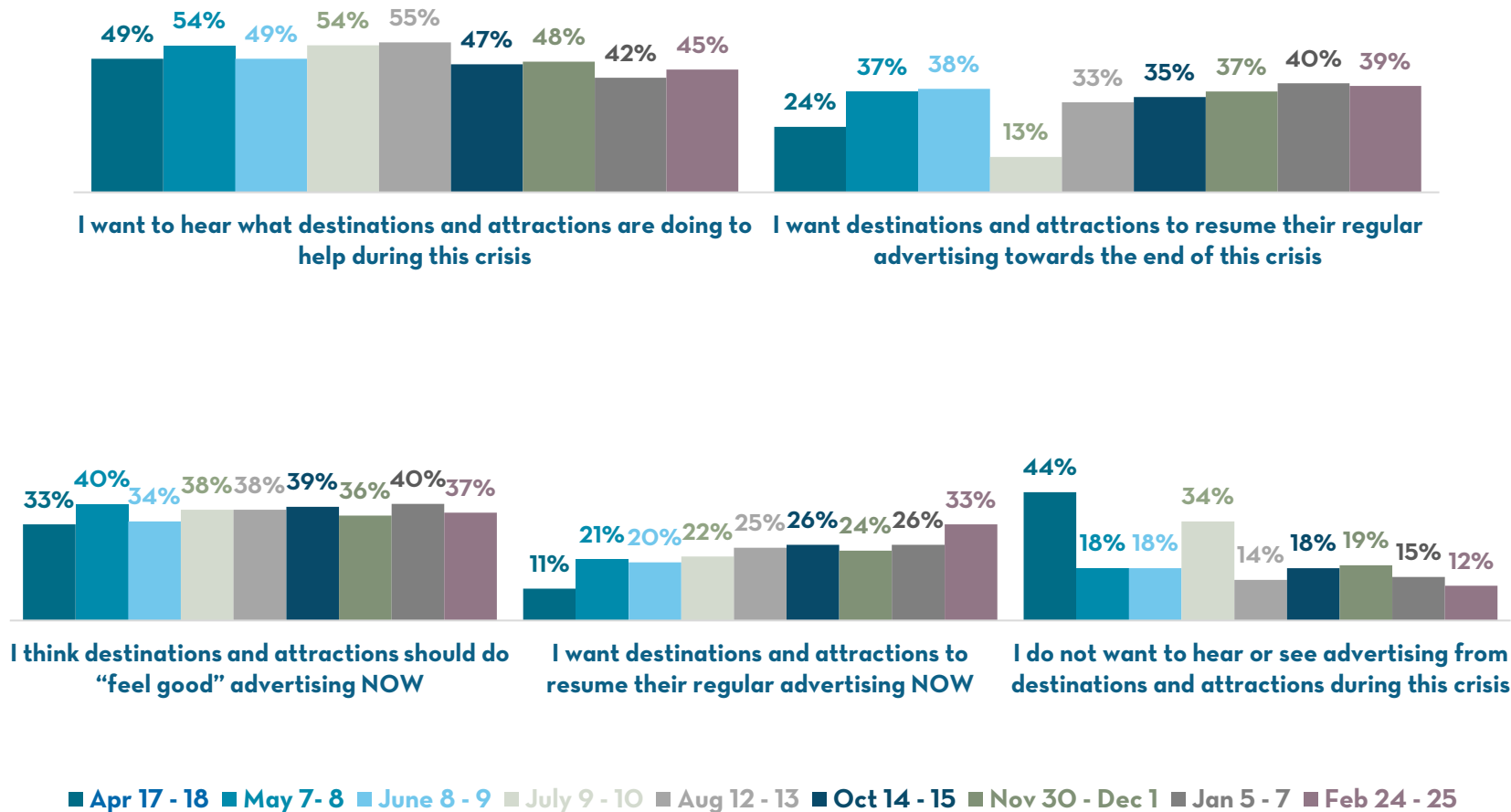
Destination Advertising during COVID-19

Consumers are slightly more interested in hearing what **destinations are doing to help during the COVID-19 crisis**

Consumers increasingly want destinations to **resume regular advertising now**

Only about 1 in 8 consumers do **not want to see or hear any advertising from destinations**

REGARDING ADVERTISING FROM VACATION DESTINATIONS AND ATTRACTIONS, WITH WHICH OF THE FOLLOWING DO YOU AGREE?*



*Multiple responses permitted.

Continuation of Travel Advertising

Nearly 1 in 4 consumers are ready for **“normal” advertising** for destinations, up since January

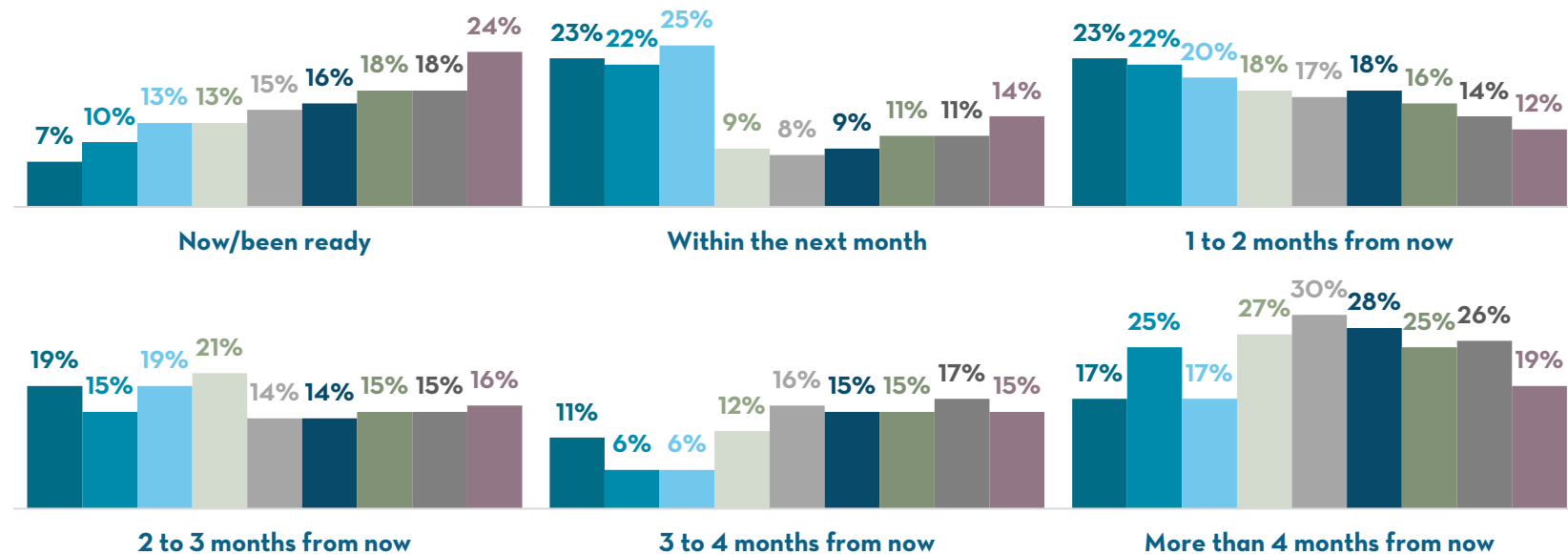
The window for resuming normal advertising is the lowest it has been since April:

- April: 69 days in the future
- May: 62 days in the future
- June: 61 days in the future
- July: 75 days in the future
- August: 70 days in the future
- October: 75 days in the future
- December: 70 days in the future
- January: 74 days in the future
- February: 60 days into the future

WHEN DO YOU THINK IT WILL BE APPROPRIATE FOR DESTINATIONS AND ATTRACTIONS TO RESUME THEIR NORMAL ADVERTISING EFFORTS?

18

Median Date April: June 25th
 Median Date May: July 8th
 Median Date June: August 8th
 Median Date July: September 23^d
 Median Date August: October 21st
 Median Date October: December 29th
 Median Date December: February 8th
 Median Date January: March 22nd
 Median Date February: April 25th



■ Apr 17 - 18 ■ May 7 - 8 ■ June 8 - 9 ■ July 9 - 10 ■ Aug 12 - 13 ■ Oct 14 - 15 ■ Nov 30 - Dec 1 ■ Jan 5 - 7 ■ Feb 24 - 25

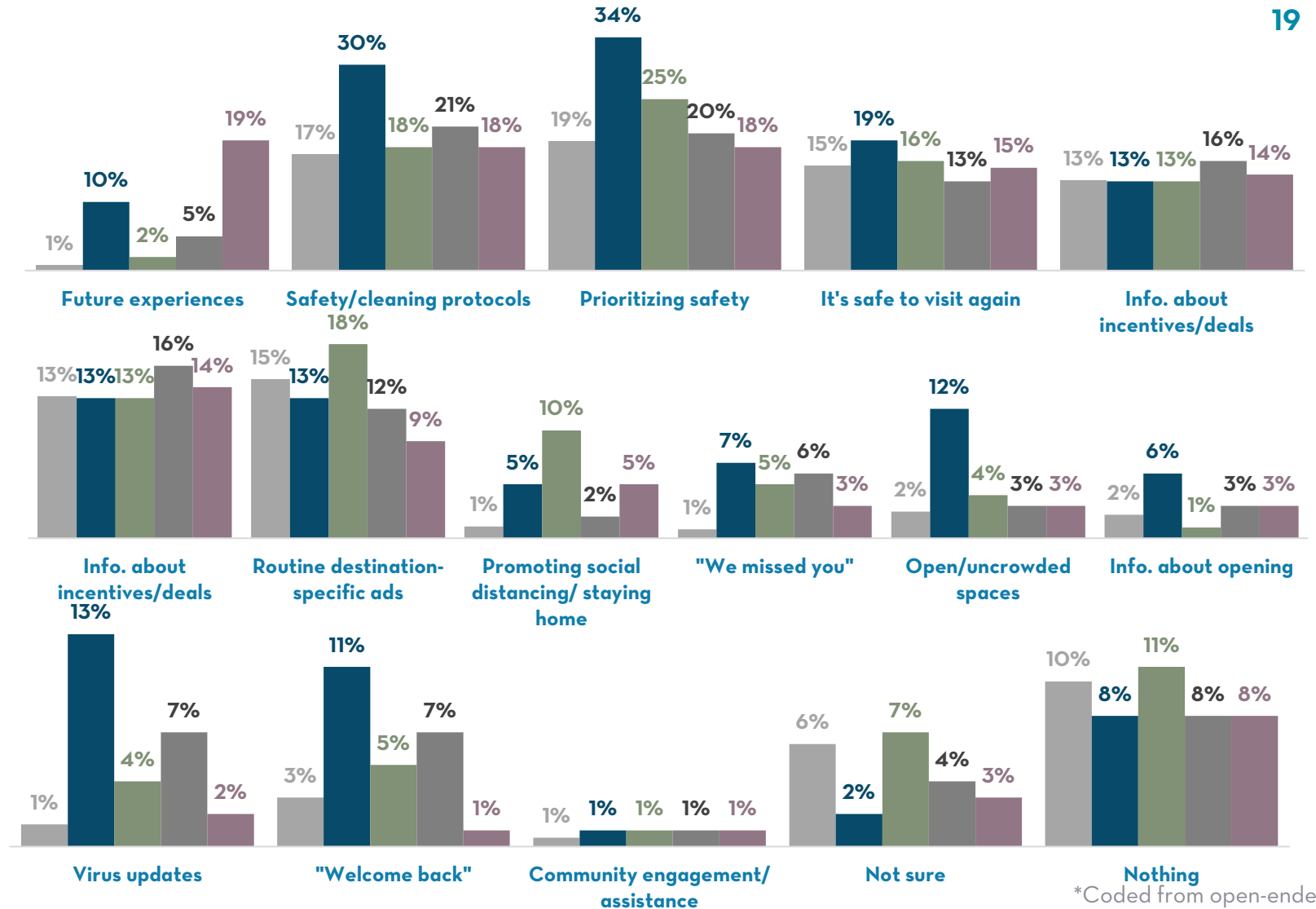
Desired Messaging from Destinations/Attractions

The top advertising theme/message to motivate consumers to visit was **future experiences**, outpacing messages of safety for the first time

Messages about **safety** continue to be an important message to share with consumers

WHAT ADVERTISING THEME OR MESSAGE FROM DESTINATIONS/ATTRACTIONS WOULD MOTIVATE YOU TO VISIT?*

19



*Coded from open-ended verbatim responses.

Multiple responses permitted.

■ Aug 12-13 ■ Oct 14-15 ■ Nov 30-Dec 1 ■ Jan 5-7 ■ Feb 24-25

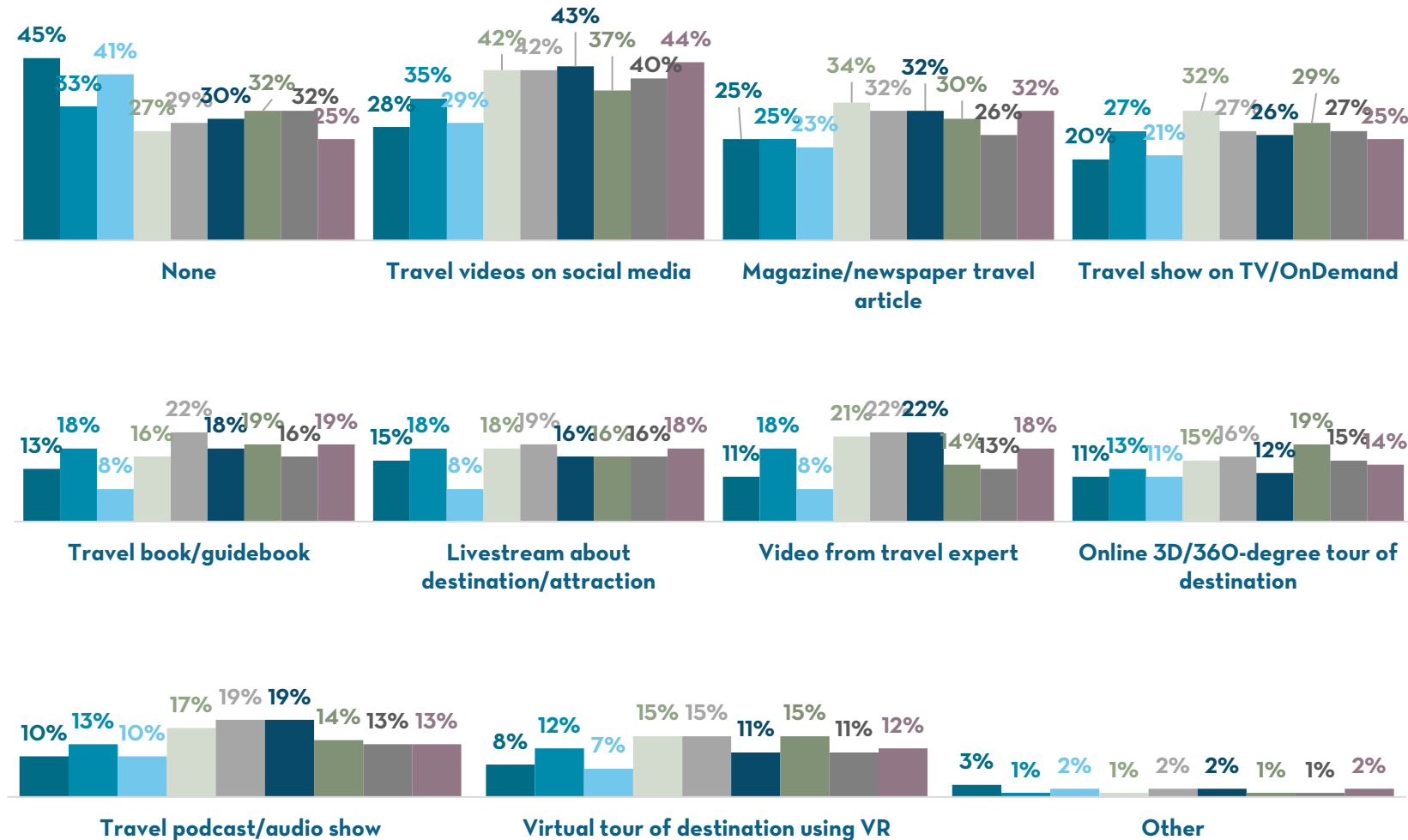
Recent Interactions with Travel Media

3 in 4 consumers interacted with travel media in February, up significantly from January

Engagement with **travel videos on social media**, **magazines & newspaper travel articles**, and **travel shows on TV/OnDemand** were the top media interactions in February

WHICH OF THE FOLLOWING HAVE YOU READ OR INTERACTED WITHIN THE PAST 2 WEEKS?*

20



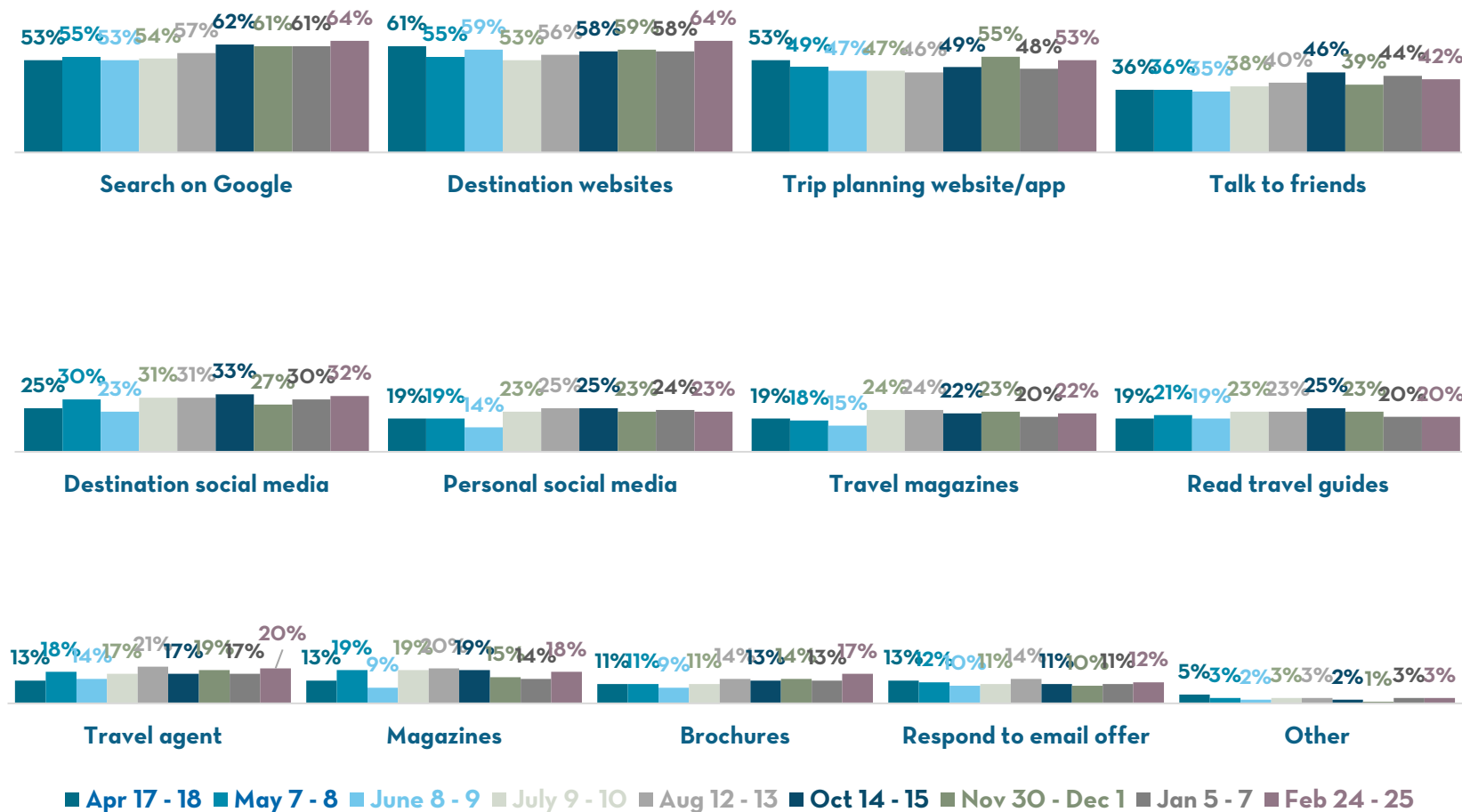
■ Apr 17 - 18 ■ May 7 - 8 ■ June 8 - 9 ■ July 9 - 10 ■ Aug 12 - 13 ■ Oct 14 - 15 ■ Nov 30 - Dec 1 ■ Jan 5 - 7 ■ Feb 24 - 25

*Multiple responses permitted.

Future Travel Planning Resources

Consumers continue to prefer Google searches and destination websites for planning their future trips

WHEN YOU ARE READY TO TRAVEL AGAIN, WHICH OF THE FOLLOWING WILL YOU USE TO PLAN YOUR TRIP?*



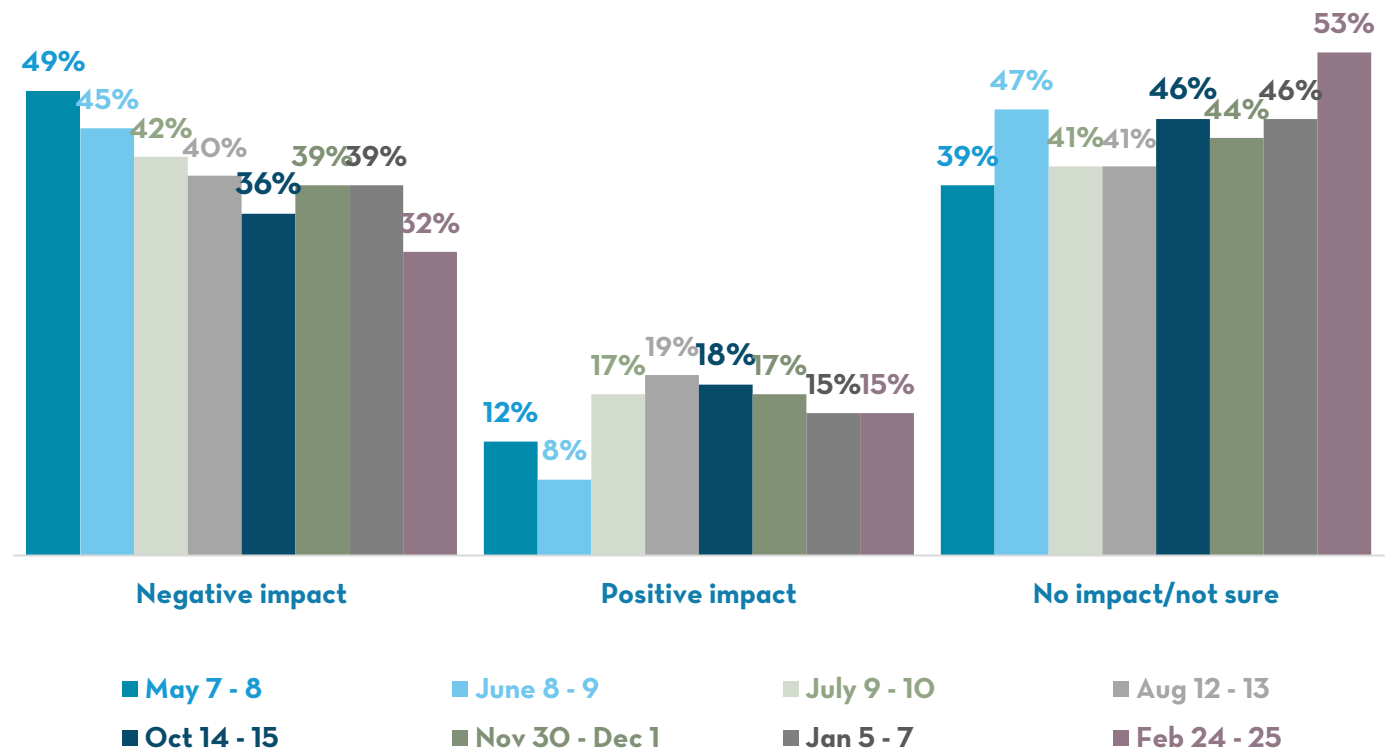
*Multiple responses permitted.

Personal Impacts of COVID-19

1 in 3 consumers say their **finances have been negatively impacted** by the economic downturn caused by COVID-19, a significant decrease from January

HAVE YOU OR YOUR IMMEDIATE FAMILY BEEN AFFECTED FINANCIALLY BY THE ECONOMIC DOWNTURN DUE TO COVID-19?

22



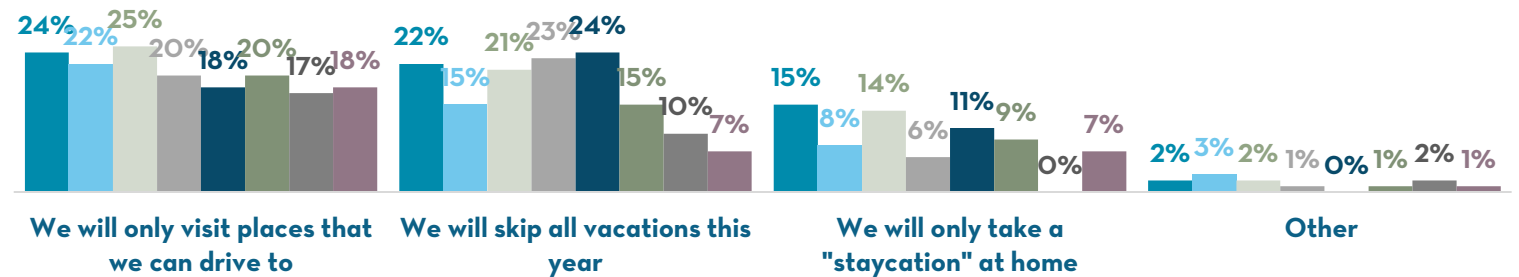
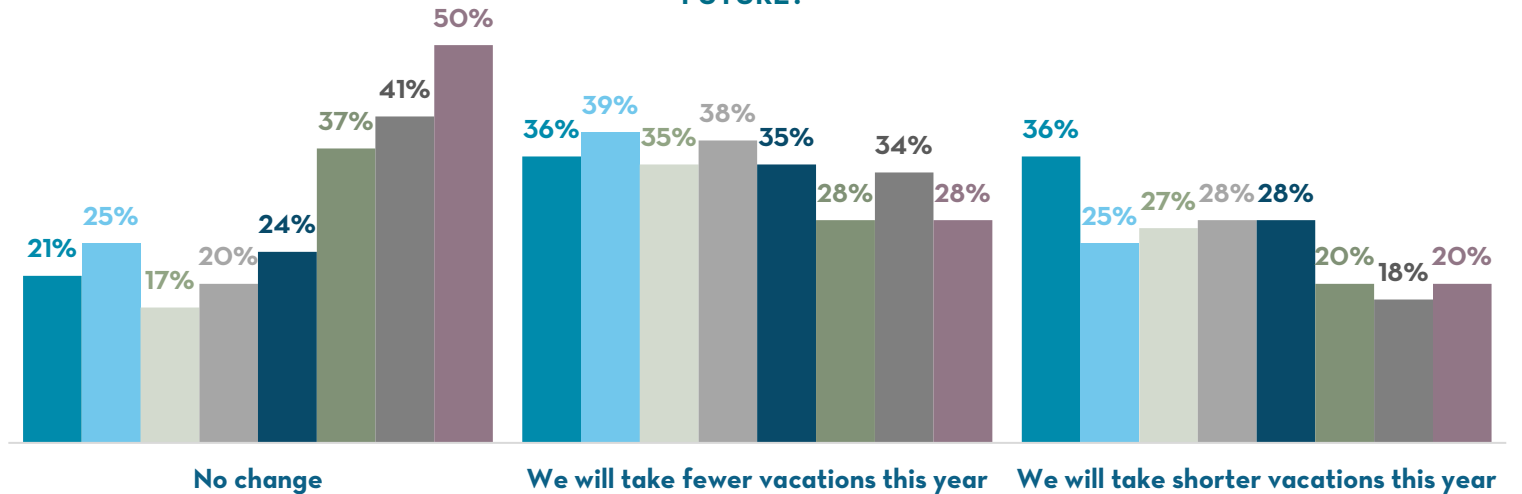
Future Travel Plans

Half of consumers say they will make **no change** in their travel plans as a result of the economic downturn

Still, over 1 in 4 consumers say they will take **fewer or skip all vacations this year**

HOW WILL THE ECONOMIC DOWNTURN AFFECT YOUR TRAVEL PLANS, NOW OR IN THE FUTURE?*

23



■ May 7 - 8 ■ June 8 - 9 ■ July 9 - 10 ■ Aug 12 - 13 ■ Oct 14 - 15 ■ Nov 30 - Dec 1 ■ Jan 5 - 7 ■ Feb 24 - 25

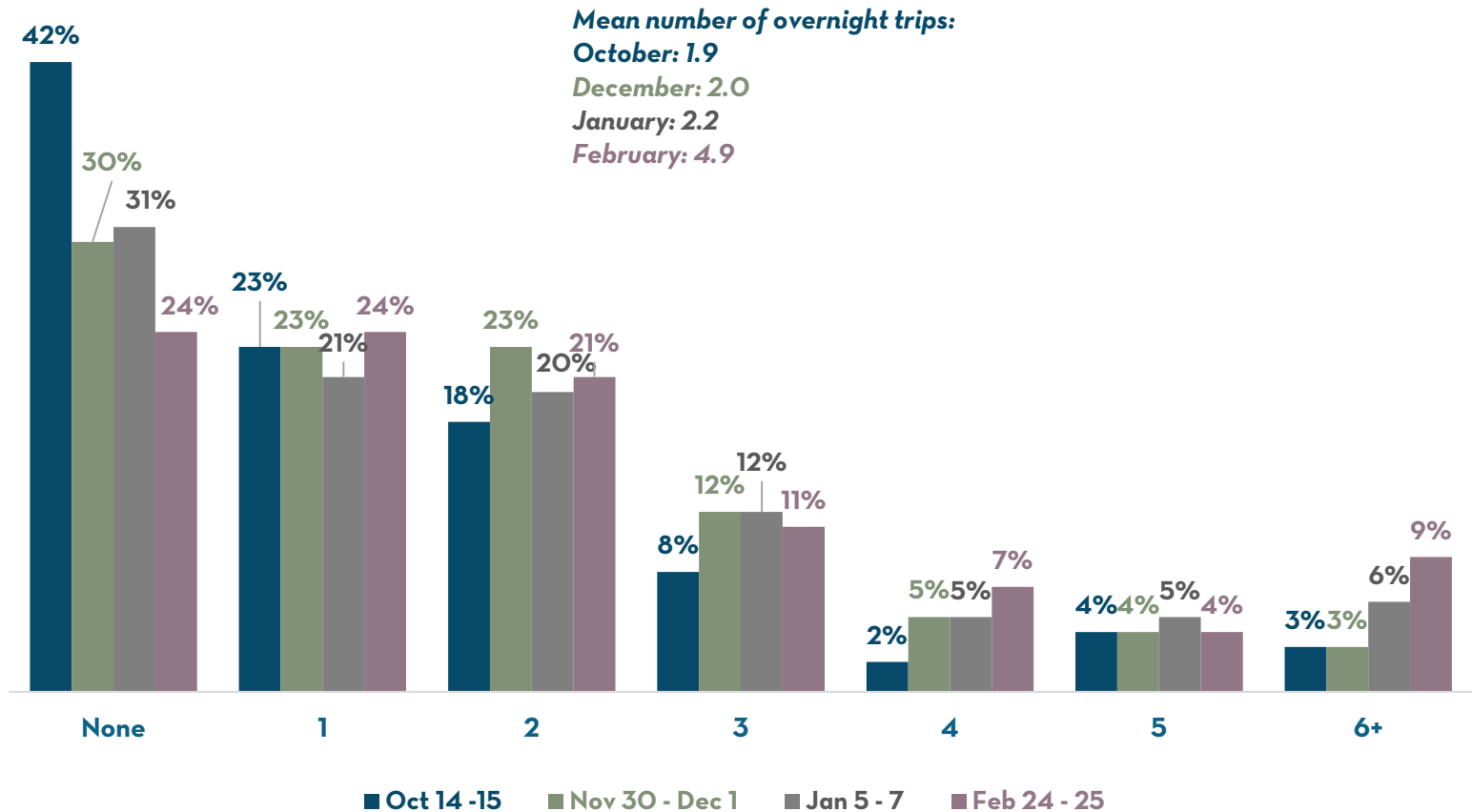
*Multiple responses permitted.

Overnight Travel

24

3 in 4 consumers have taken at least **one overnight** trip since April, up from January

HOW MANY OVERNIGHT TRIPS HAVE YOU TAKEN SINCE APRIL 2020?

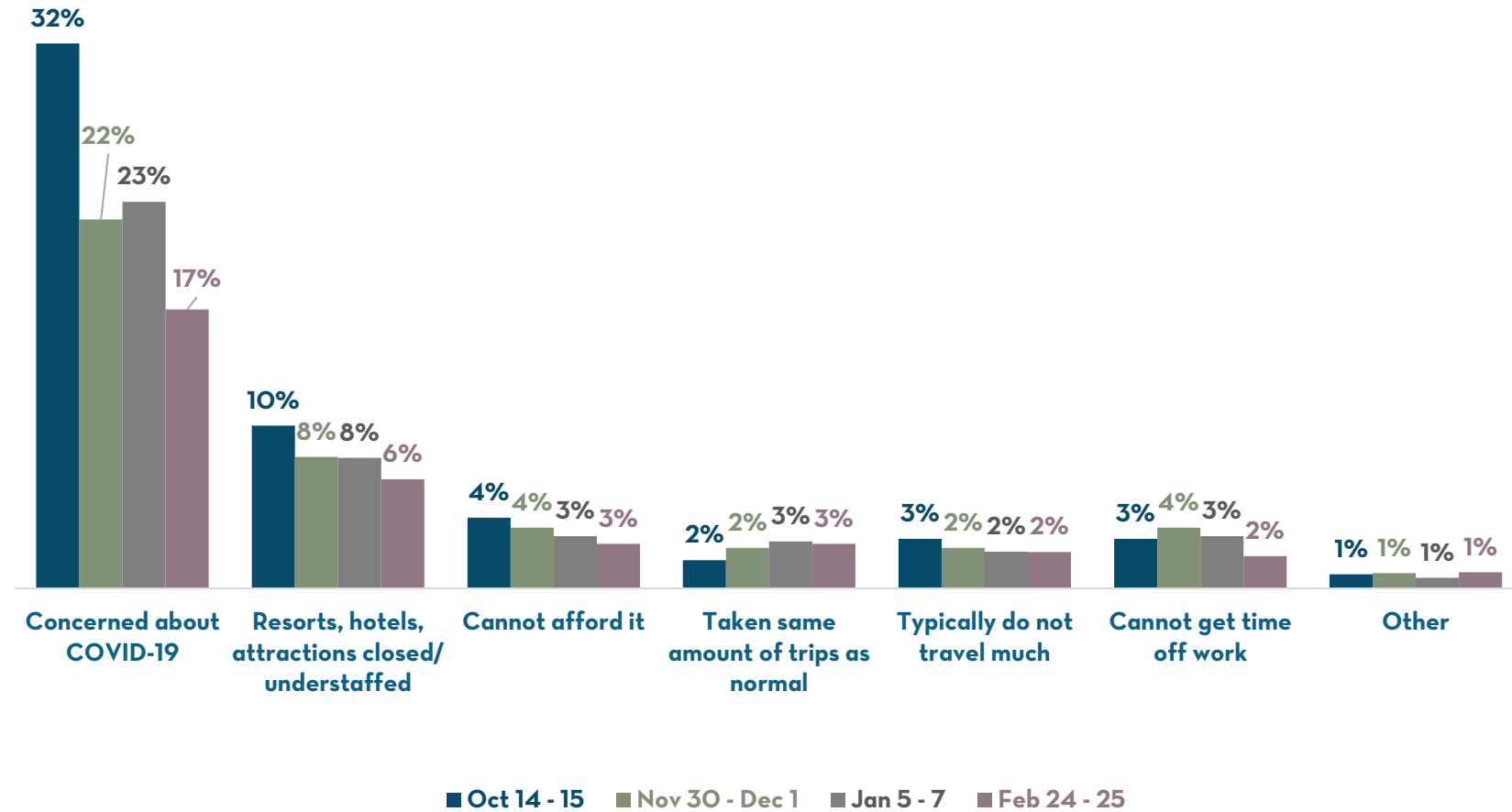


Overnight Travel

25

Nearly **1 in 5** consumers have not traveled more since April due to **concerns about COVID-19**, down from January

WHY HAVEN'T YOU TAKEN (MORE) OVERNIGHT TRIPS SINCE APRIL 2020?

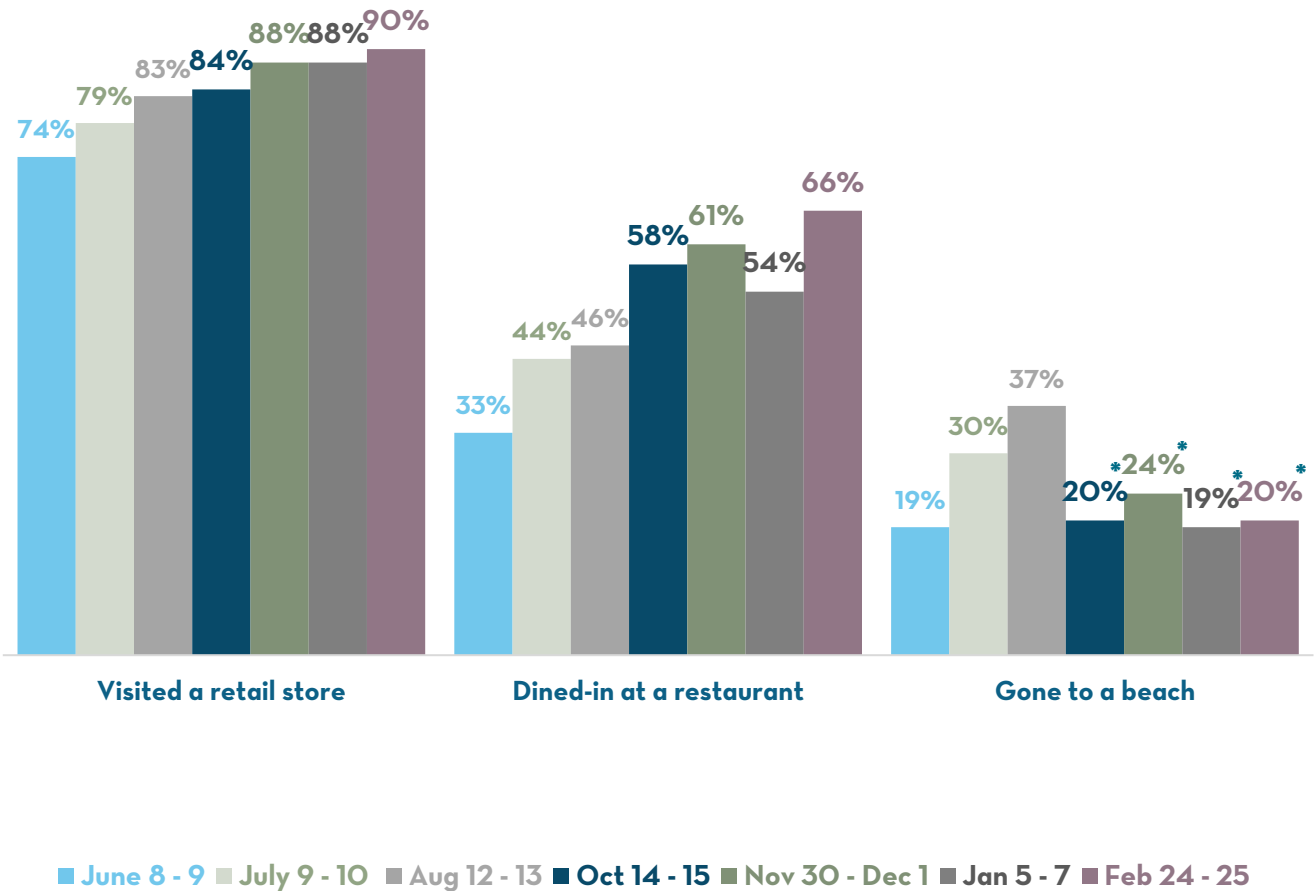


Recent Tourism Activity

In February, more consumers have **visited a retail store, dined out** or **gone to a beach** in the past month



IN THE PAST MONTH, HAVE YOU:

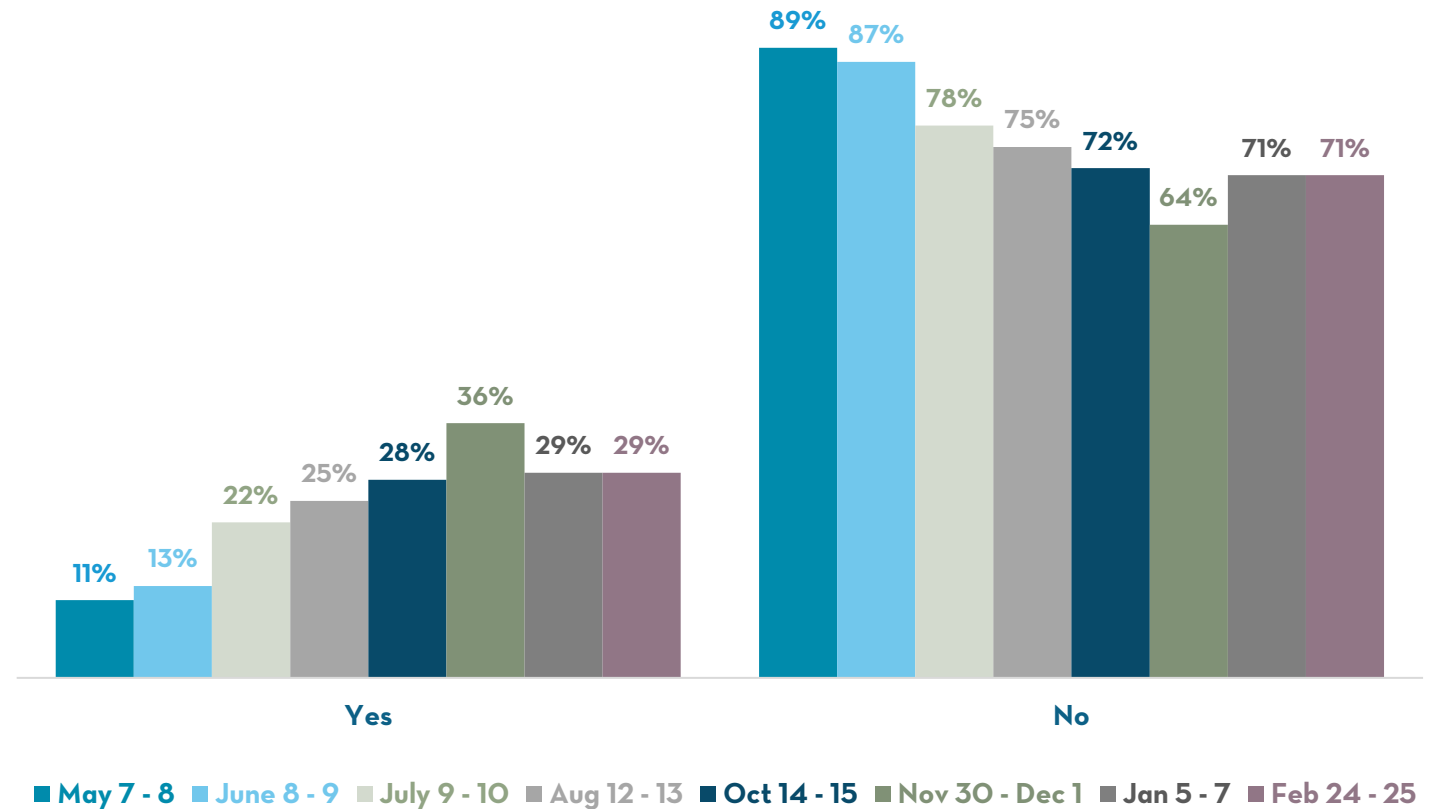


*Decrease in the percentage of travelers visiting beaches may be due to different origin markets in the sample

Recent Overnight Travel

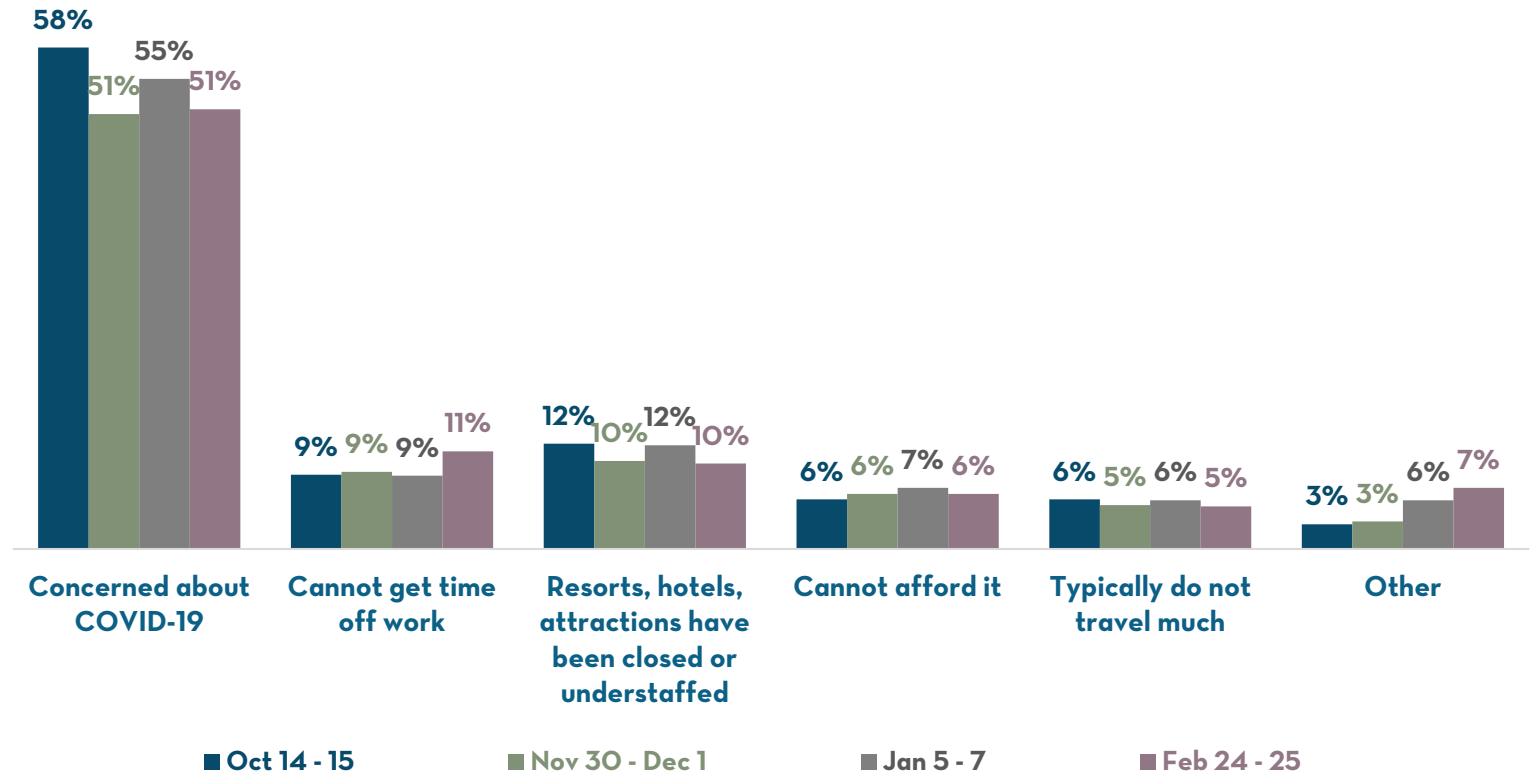
Nearly 3 in 10 **consumers took an overnight trip** in the past month, no change from January

HAVE YOU TRAVELED OVERNIGHT IN THE PAST MONTH?



Reasons for not Recently Traveling

Half of consumers refrained from traveling overnight in the past month due to **concerns about COVID-19**



*Multiple responses permitted.

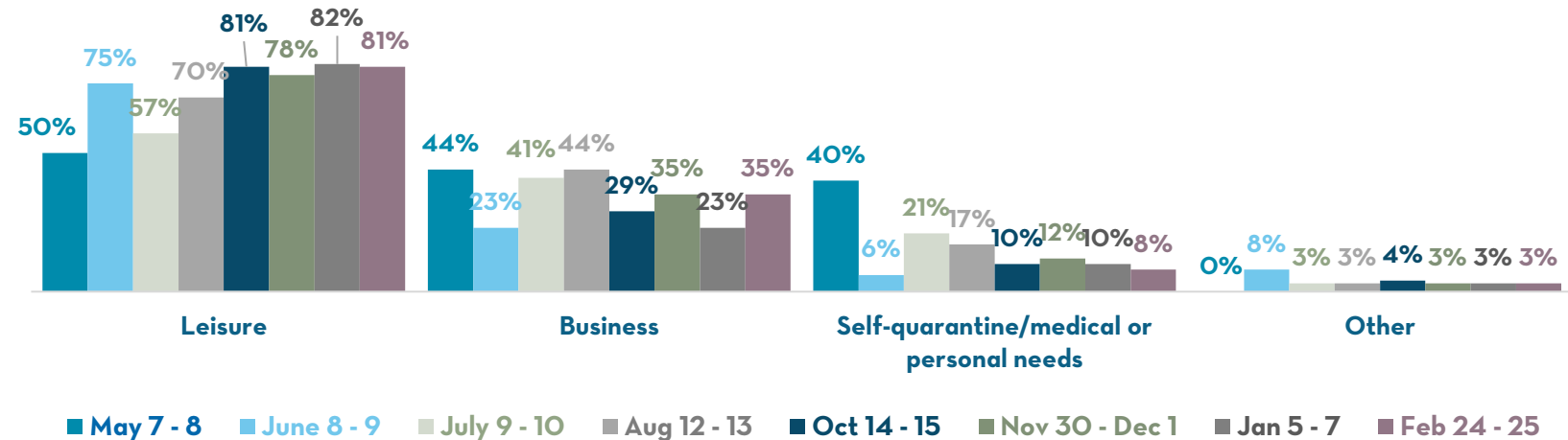
Purpose of Recent Travel

29

Consumers who traveled in the past month did so primarily for leisure

Business travel increased from January

WHAT WAS THE PRIMARY PURPOSE OF YOUR TRIP(S)?*

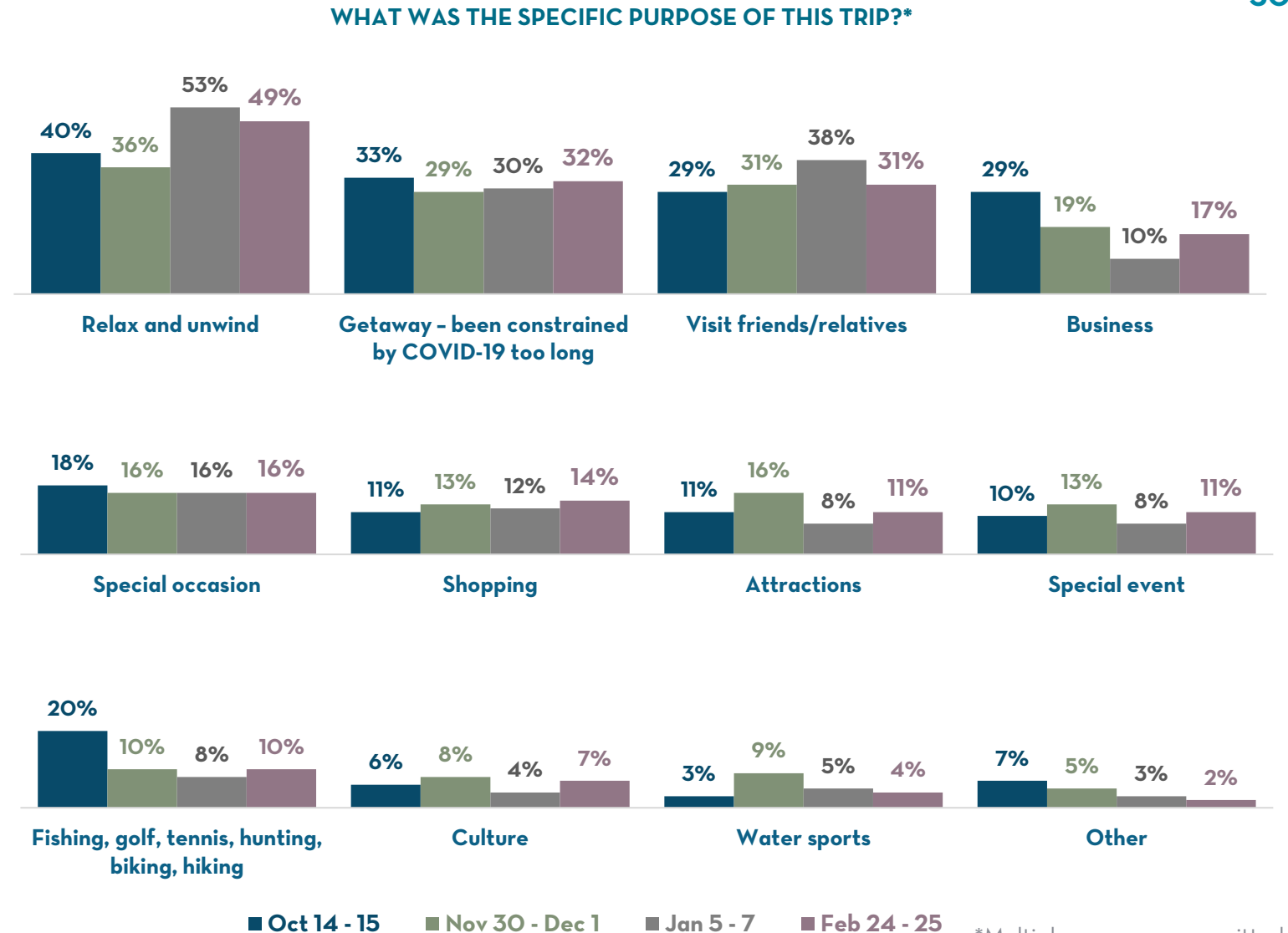


*Multiple responses permitted.

Purpose of Recent Travel

Half of consumers traveled to relax and unwind in the past month

1 in 3 consumers traveled to get away from COVID-19 constraints or to visit friends and family



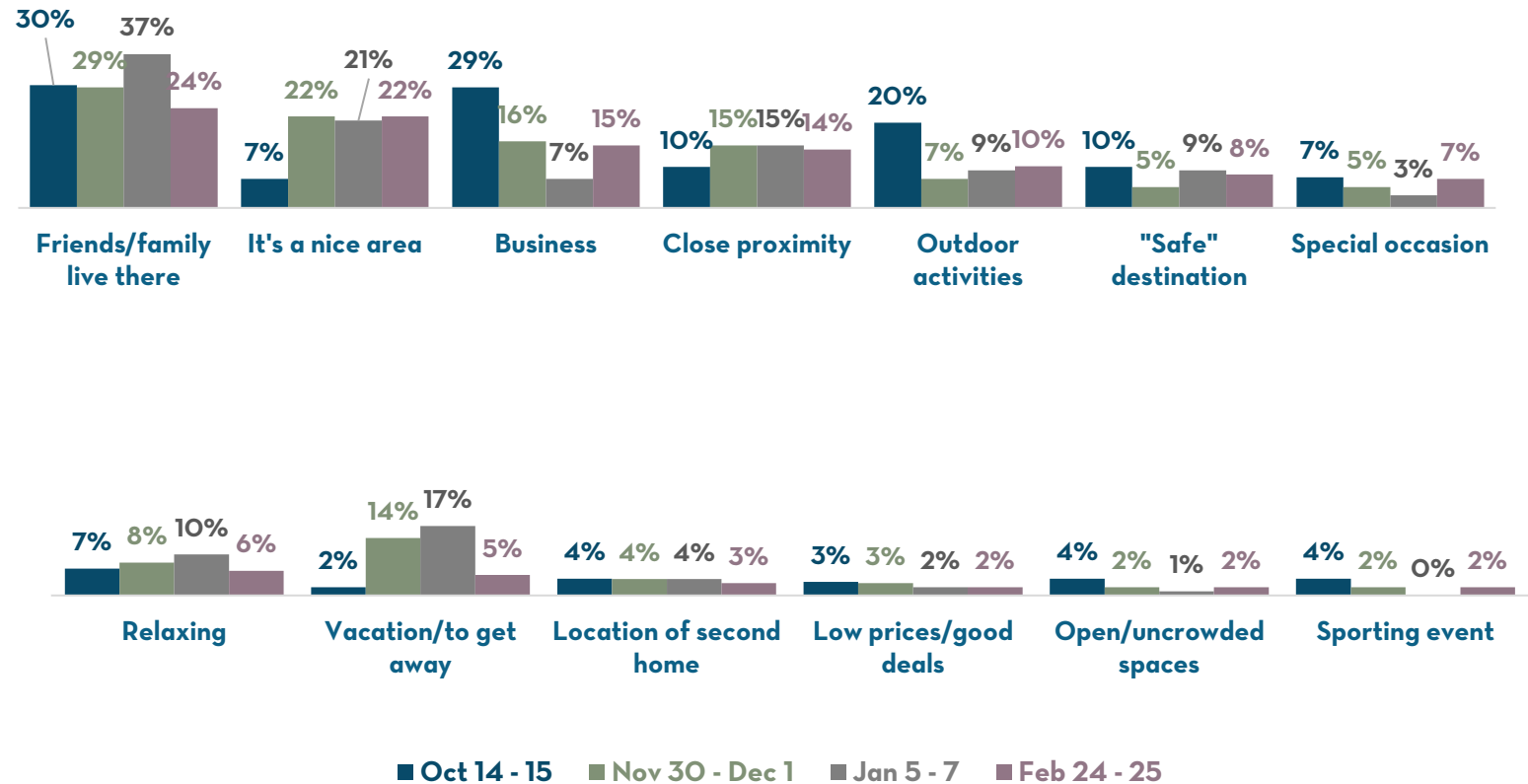
*Multiple responses permitted.

Recent Travel Decisions

31

1 in 4 consumers who traveled in the past month chose their destination because they **have friends and family who live there** or because they generally **like the area**

WHY DID YOU CHOOSE THOSE DESTINATIONS FOR YOUR TRIP(S) IN THE PAST MONTH?*



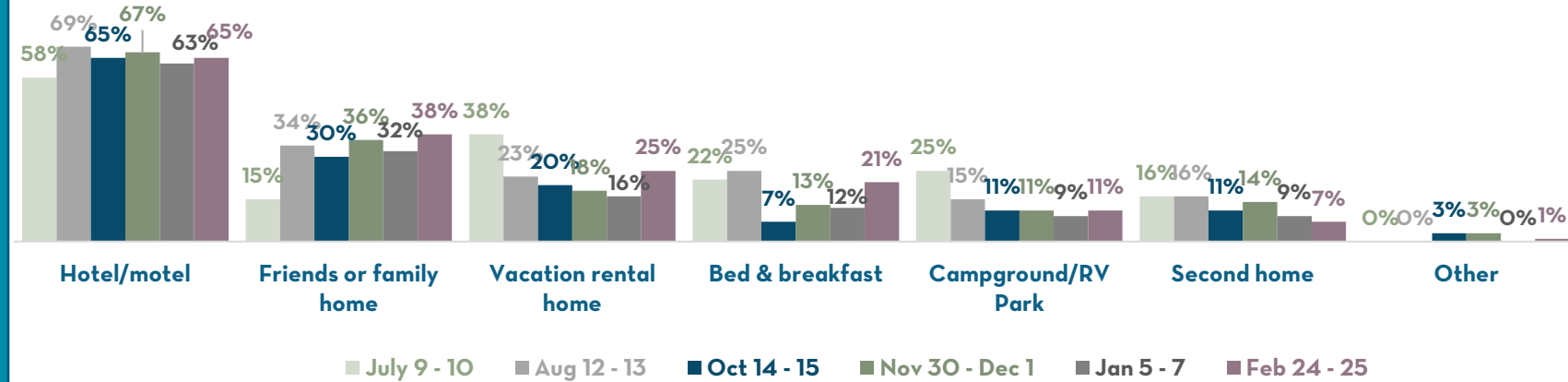
*Coded open-ended verbatim responses. Multiple responses permitted.

Recent Travel Accommodations

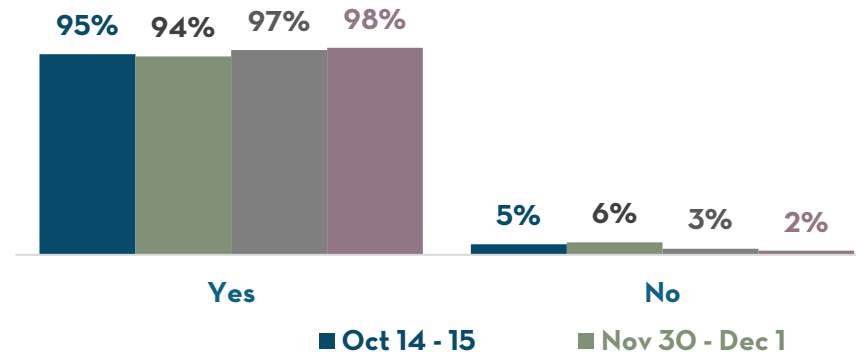
2 in 3 consumers who have taken one or more overnight trips in the past month **stayed in a hotel/motel** on their trip

Nearly **all** consumers **felt safe in their accommodations**

IN WHAT TYPE OF ACCOMMODATIONS DID YOU STAY ON YOUR TRIP(S) IN THE PAST MONTH?*



DID YOU FEEL SAFE IN YOUR ACCOMMODATIONS?



*Multiple responses permitted.

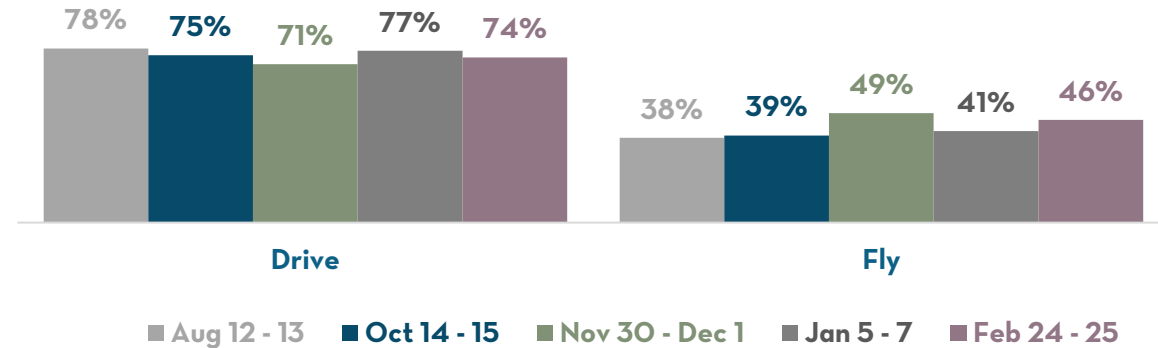
Recent Travel Transportation

Despite preference for driving, nearly **half** of consumers who have taken one or more overnight trips in the past month **took a flight** on their trip – this represents 13% of all consumers

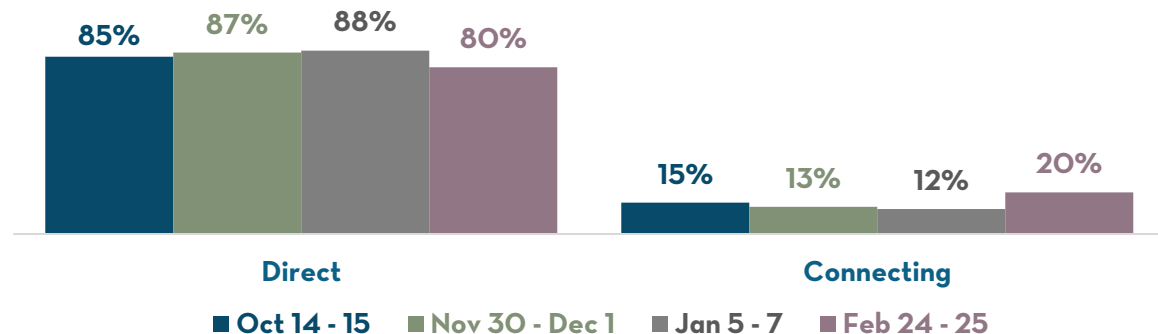
4 in 5 consumers who flew **had a direct flight**

More consumers took a flight with connections in February

DID YOU DRIVE OR FLY ON YOUR TRIP?*



WAS YOUR FLIGHT DIRECT OR DID YOU HAVE A CONNECTION?

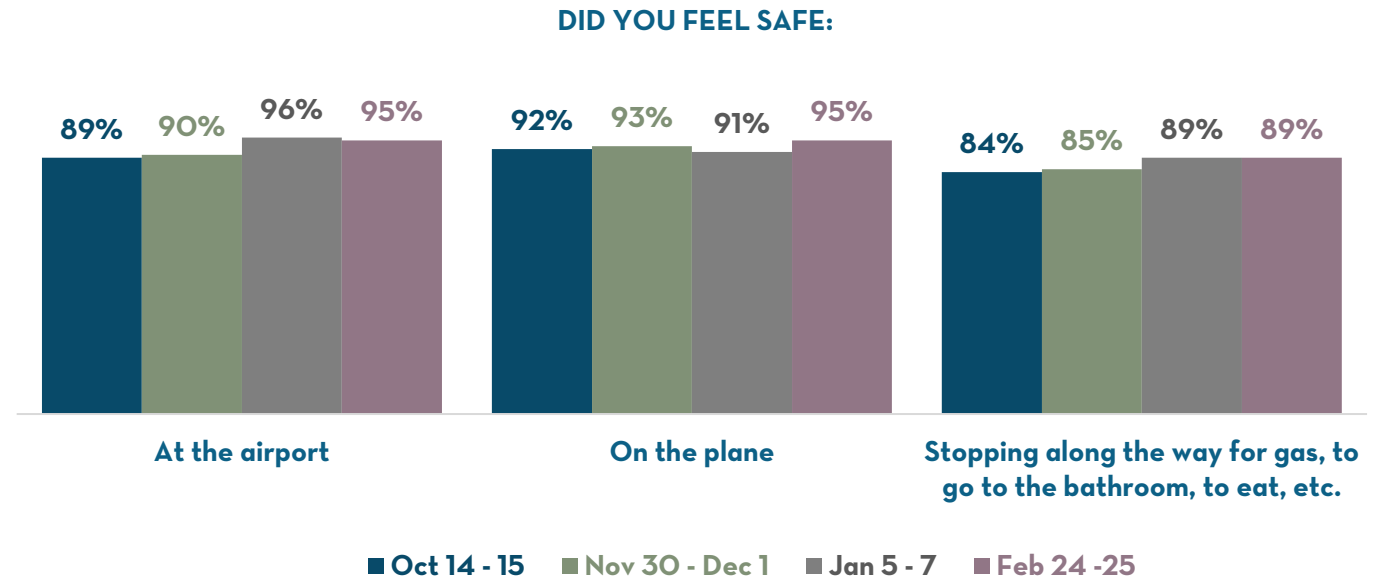


*Multiple responses permitted.

Recent Travel Transportation

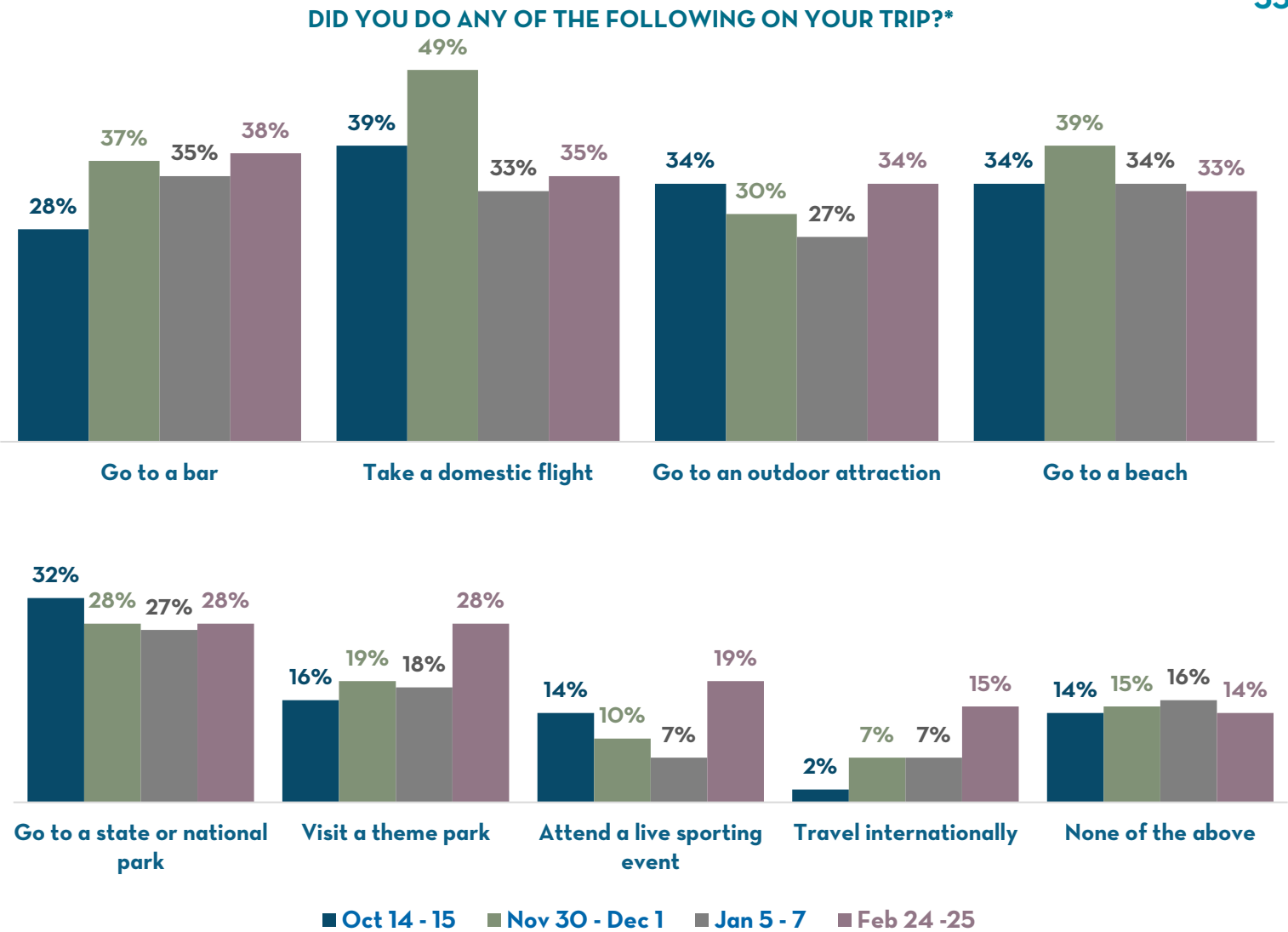
34

Overall, consumers **felt safe while traveling to their destinations**



Recent Travel Activities

Consumers who traveled overnight in the past month were **more likely to participate in various activities on their trips** than those who had traveled the month prior in January

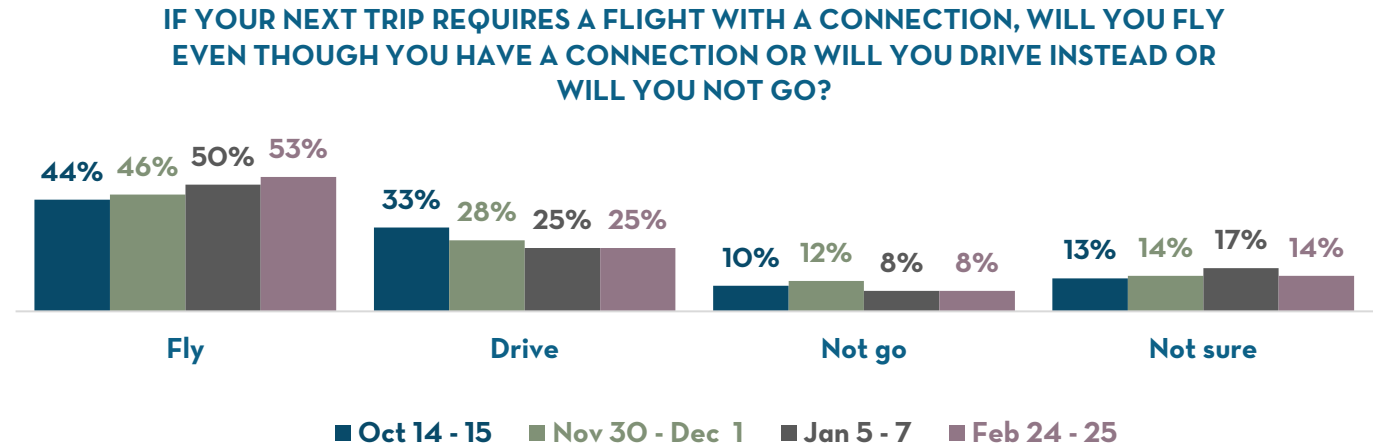
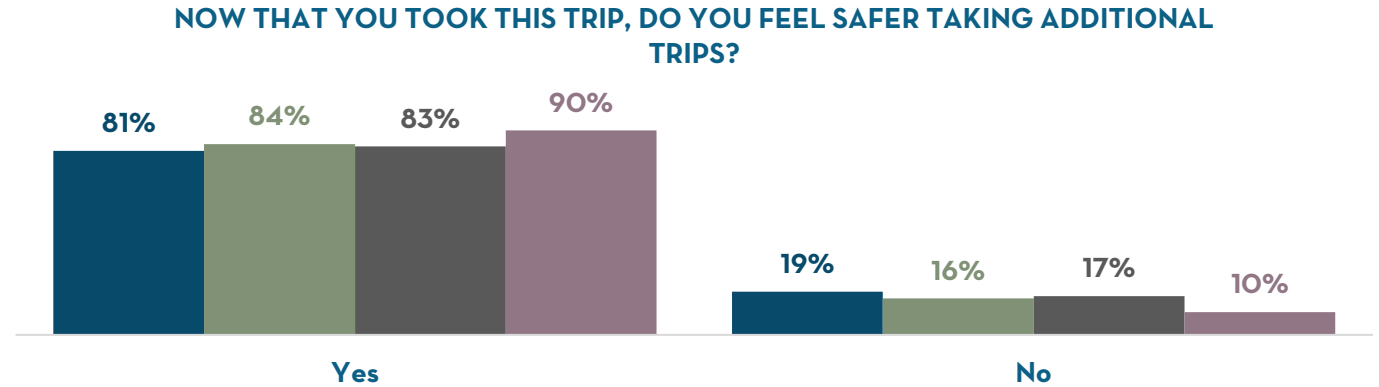


*Multiple responses permitted.

Future Travel Behavior

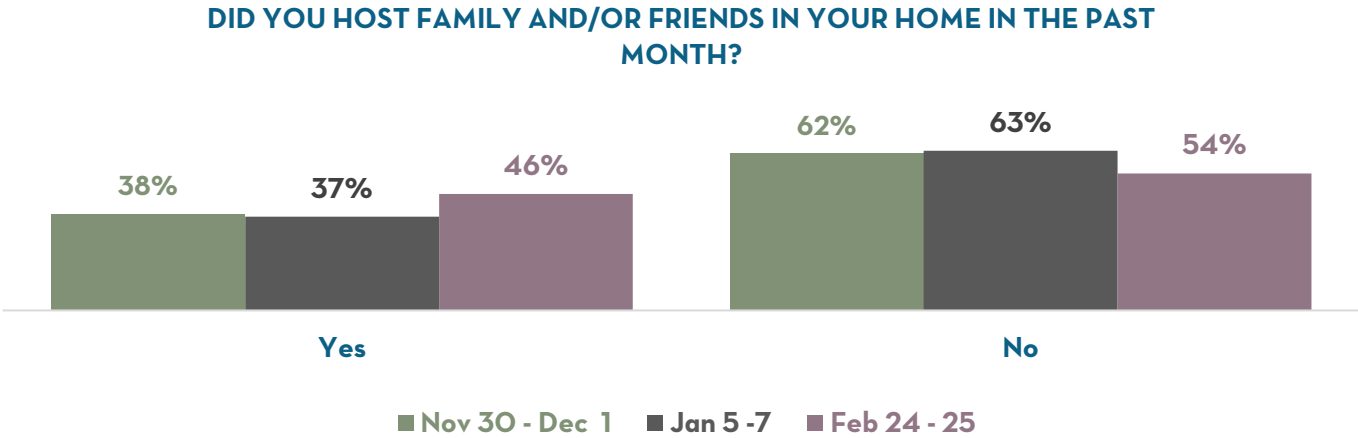
9 in 10 consumers who have taken one or more overnight trips in the past month feel safer taking additional trips now

Over half of consumers are willing to take a flight with a **connection** on their next trip



HOSTING FRIENDS & FAMILY

Nearly half of consumers hosted friends or family in their home in the past month





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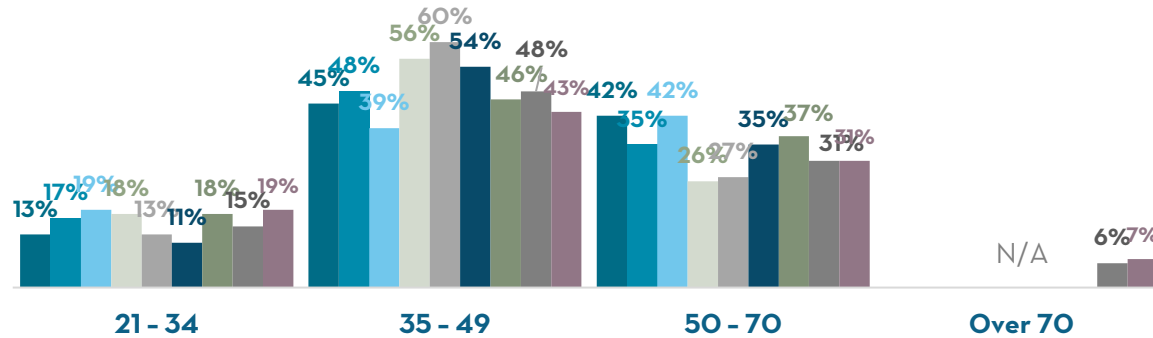
Consumer Profile



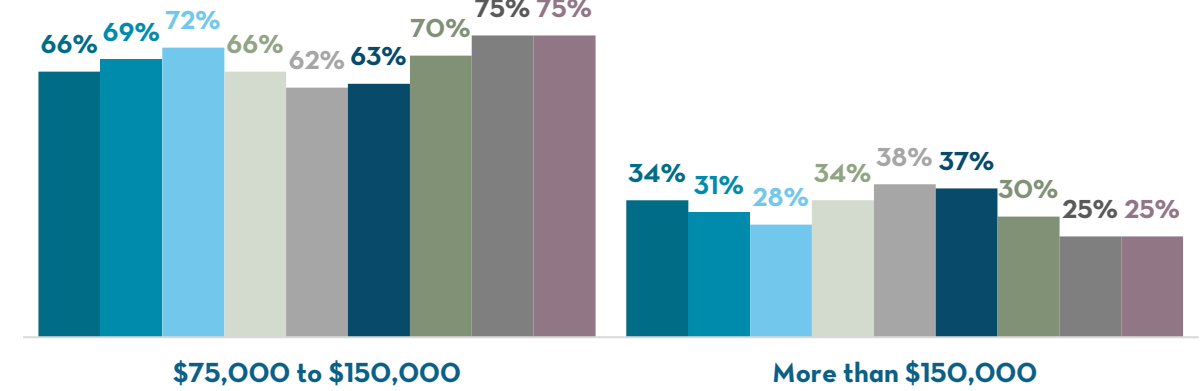
Consumer Profile*

39

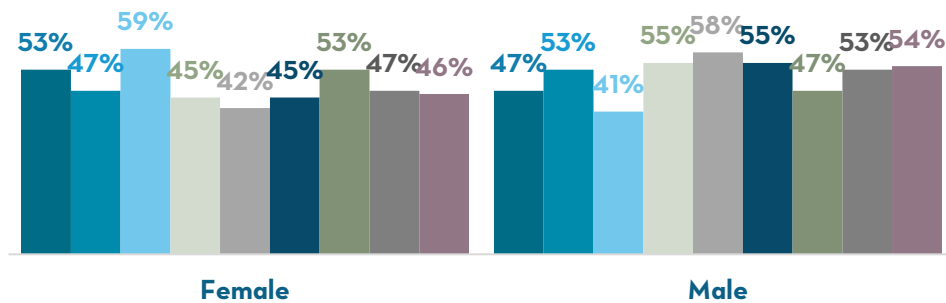
Age



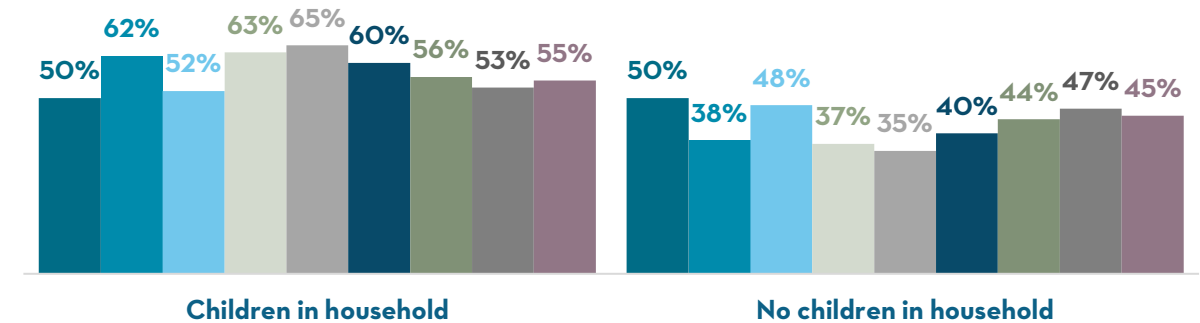
Household Income



Gender



Children in Household



■ Apr 17 - 18 ■ May 7 - 8 ■ June 8 - 9 ■ July 9 - 10 ■ Aug 12 - 13 ■ Oct 14 - 15 ■ Nov 30 - Dec 1 ■ Jan 5 - 7 ■ Feb 24 - 25



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