Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

Apr - Jun 2024

Visitor Tracking, Occupancy & Economic Impact Study

fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

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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

QUARTERLY SNAPSHOT

Apr - Jun 2024

- **Visitation** was **up 36.7%** and **room nights** were **up 19.1%.**
  - The steep increase in visitation was due largely to an increased number of units available, but also partially due to increases in occupancy and travel party size.
- The **proportion of visitors** who **stayed with friends or relatives** during their trip increased from **30%** in Apr-Jun 2023 to **33%** in Apr-Jun 2024.
- **Direct Spending** was **up 31.4%** and **Economic Impact of Tourism** was **up 30.8%**, when compared to Apr-Jun 2023, which was the third quarter after the impact of Hurricane Ian.
- **In-State Visitation** saw the largest year-over-year increase **(+95%)** of any visitor origins, going from **36k visitors** in Apr-Jun 2023 to **70k visitors** in Apr-Jun 2024.

55.8%	$170.05	$94.83
OCCUPANCY RATE	**AVERAGE DAILY RATE**	**REVENUE PER ROOM**
↑ 4.7% from 2023	↑ 11.9% from 2023	↑ 17.2% from 2023

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VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

TOURISM SNAPSHOT: KEY METRICS APR-JUN 2023 VS. 2024

Visitor & Lodging Statistics	Apr - Jun 2023[3]	Apr - Jun 2024	% Change '23-'24
Visitors	591,600	808,900	+ 36.7%
Visitor Days	3,622,600	4,999,000	+ 38.0%
Room Nights	864,200	1,029,300	+ 19.1%
Direct Expenditures[1]	$568,611,600	$747,288,600	+ 31.4%
Total Economic Impact[2]	$910,347,200	$1,190,430,700	+ 30.8%

[1] Includes: accommodations, restaurants, entertainment, shopping, transportation, groceries, and “other” expenses.
[2] 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.
[3] Data has been revised to reflect updated unit figures for RV Parks & Campgrounds as determined in a survey of Lee County RV Parks & Campgrounds conducted by DSG Research.

TOURISM SNAPSHOT: KEY METRICS APR-JUN 2022 VS. 2024

Visitor & Lodging Statistics	Apr - Jun 2022[3]	Apr - Jun 2024	% Change '22-'24
Visitors	1,342,800	808,900	-39.8%
Visitor Days	7,008,500	4,999,000	-28.7%
Room Nights	1,467,600	1,029,300	-29.9%
Direct Expenditures[1]	$1,062,290,900	$747,288,600	-29.7%
Total Economic Impact[2]	$1,692,229,400	$1,190,430,700	-29.7%

[1] Includes: accommodations, restaurants, entertainment, shopping, transportation, groceries, and "other" expenses.
[2] 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.
[3] Data has been revised to reflect updated unit figures for RV Parks & Campgrounds as determined in a survey of Lee County RV Parks & Campgrounds conducted by DSG Research.

TOURISM SNAPSHOT: KEY METRICS FISCAL YEAR-TO-DATE

Visitor & Lodging Statistics	FYTD 2023[3]	FYTD 2024[3]	% Change '23-'24
Visitors	1,744,800	2,443,200	+ 40.0%
Visitor Days	12,541,000	15,595,000	+ 24.4%
Room Nights	2,811,800	3,457,000	+ 22.9%
Direct Expenditures[1]	$1,915,701,100	$2,453,510,000	+ 28.1%
Total Economic Impact[2]	$3,062,864,000	$3,913,710,400	+ 27.8%

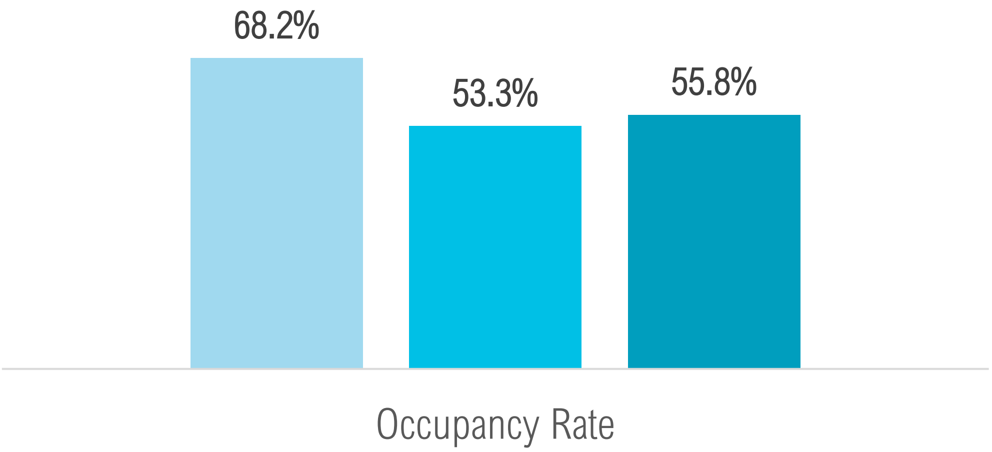
[1] Includes: accommodations, restaurants, entertainment, shopping, transportation, groceries, and "other" expenses.
[2] Economic impact includes indirect and induced effects of visitor spending. Indirect effects are increased business spending resulting from tourism dollars. Induced effects are increased household spending resulting from tourism dollars.
[3] Data has been revised to reflect updated unit figures for RV Parks & Campgrounds as determined in a survey of Lee County RV Parks & Campgrounds conducted by DSG Research.

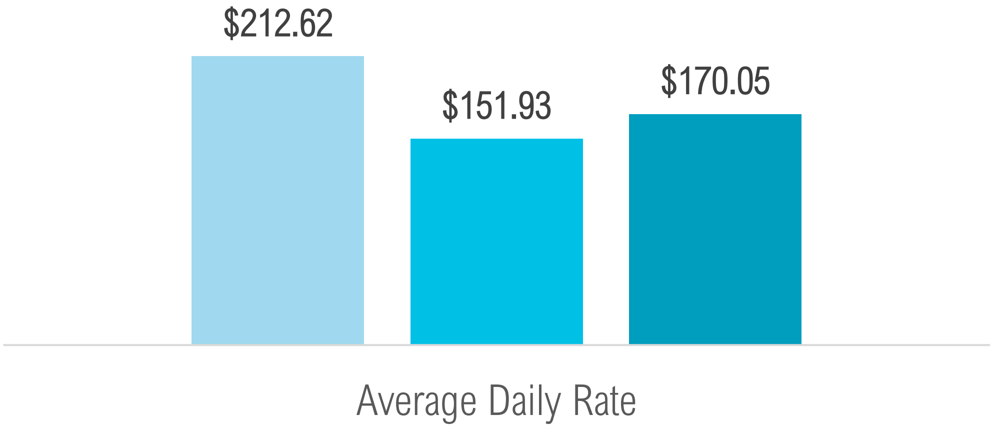
APR-JUN LODGING STATISTICS[1]

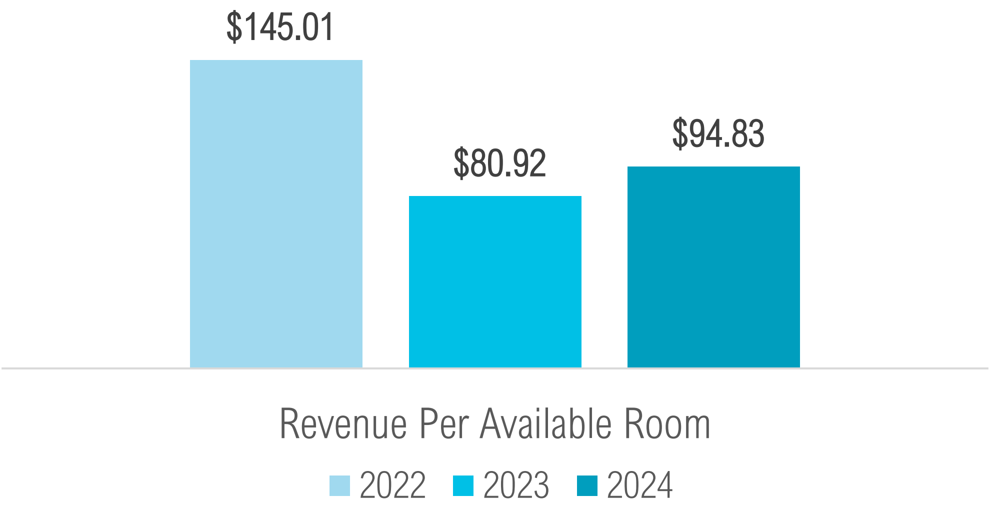
55.8%	$170.05	$94.83
Occupancy	ADR	RevPAR
↑ 4.7%	↑ 11.9%	↑ 17.2%
From 2023	From 2023	From 2023

[1] Sources: STR, KeyData, & DSG Occupancy Study

APR-JUN 2022-2024 OVERALL LODGING METRICS[1,2]

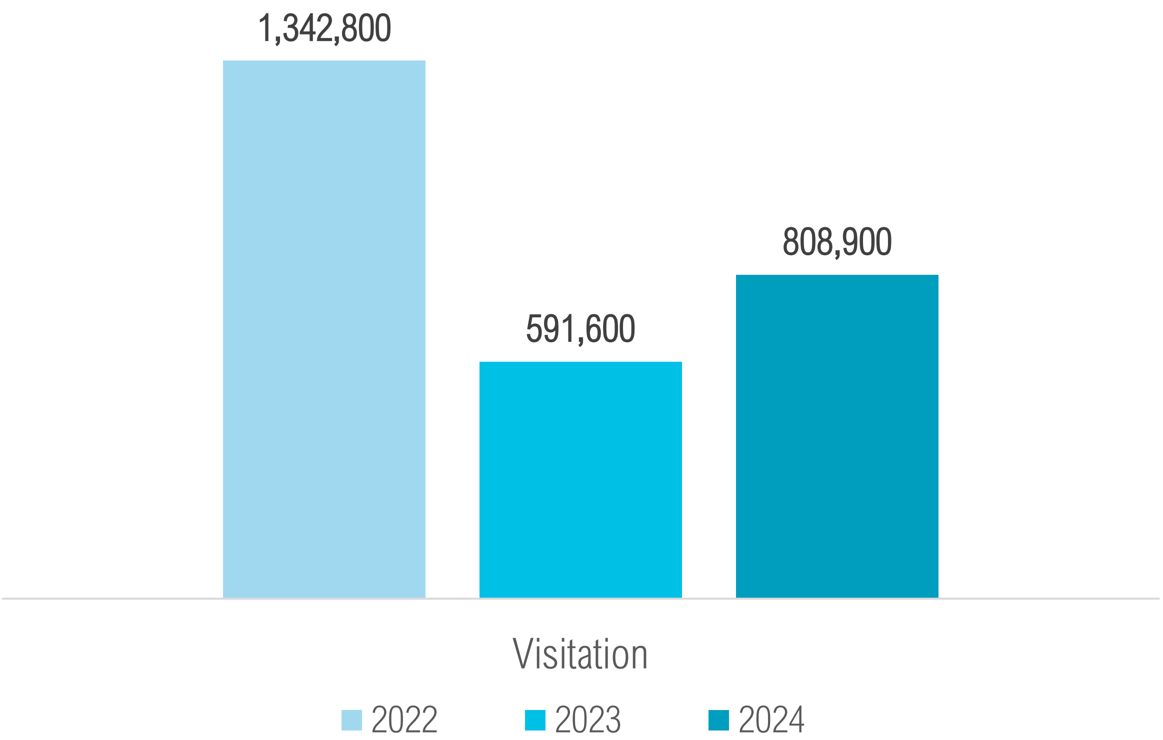


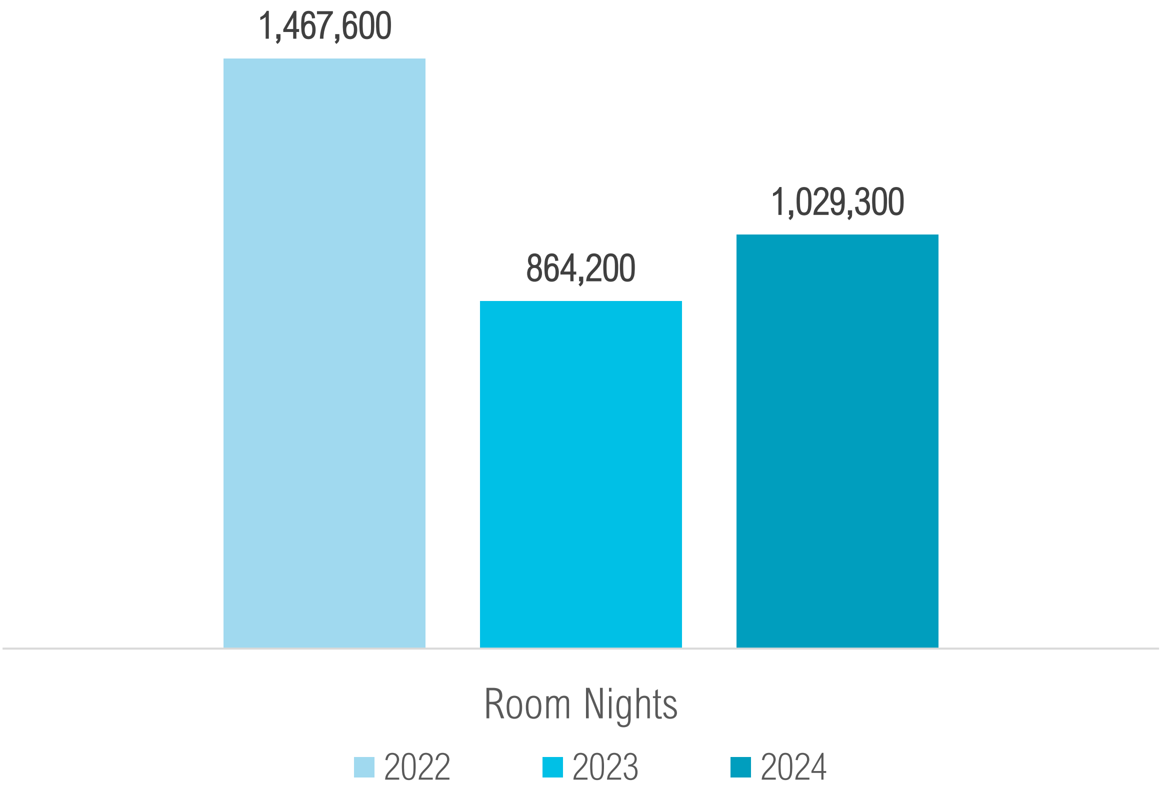




[1] Sources: STR, KeyData, & DSG Occupancy Study
[2] 2022 & 2023 data has been revised to reflect updated unit figures for RV Parks & Campgrounds as determined in a survey of Lee County RV Parks & Campgrounds conducted by DSG Research.

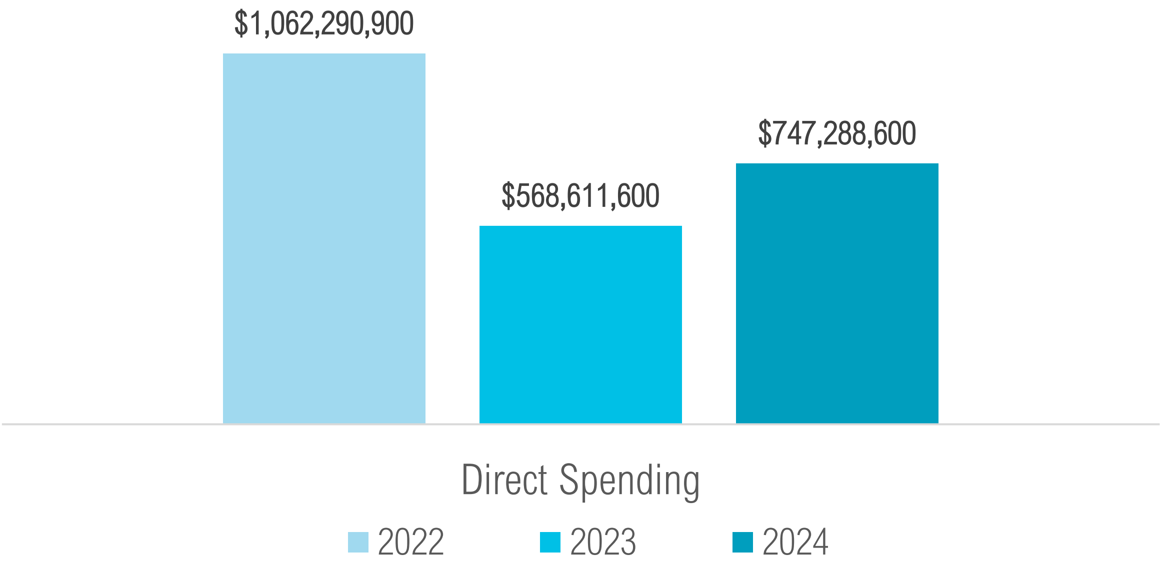
APR-JUN 2022-2024 VISITATION & ROOM NIGHTS[1,2]

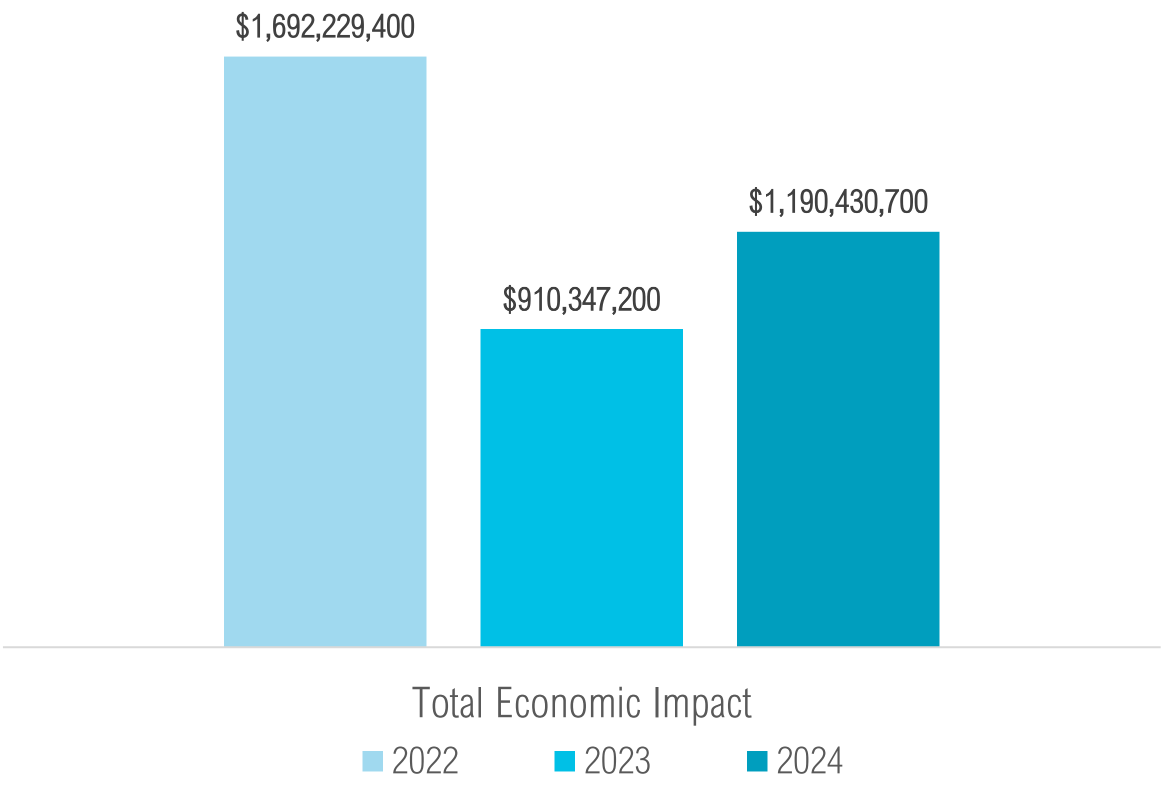




[1] Sources: STR, KeyData, & DSG Occupancy Study
[2] 2022 & 2023 data has been revised to reflect updated unit figures for RV Parks & Campgrounds as determined in a survey of Lee County RV Parks & Campgrounds conducted by DSG Research.

APR-JUN 2022-2024 SPENDING & ECONOMIC IMPACT[1,2]

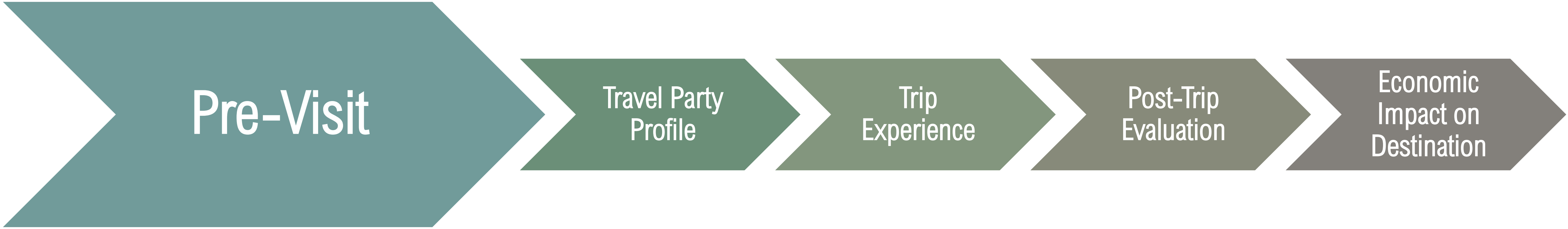




[1] Sources: STR, KeyData, & DSG Occupancy Study

[2] 2022 & 2023 data has been revised to reflect updated unit figures for RV Parks & Campgrounds as determined in a survey of Lee County RV Parks & Campgrounds conducted by DSG Research.

VISITOR JOURNEY: PRE-VISIT



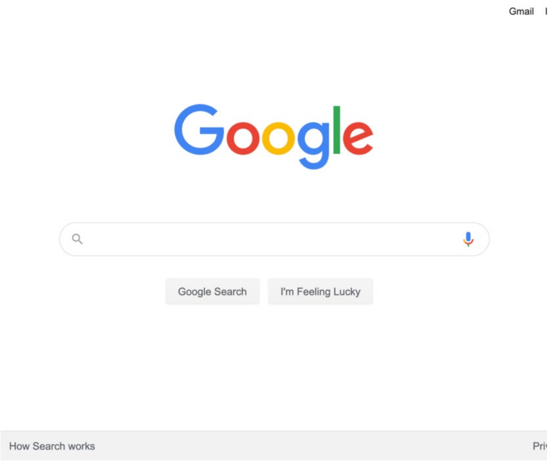
TRIP PLANNING

- Nearly 2 in 5 visitors planned their trips to the Fort Myers area 1-2 months in advance
- The median trip planning cycle lasted nearly 2 months
- 1 in 4 visitors requested information to plan their trips
    - 1 in 5 visitors called a hotel, motel, or condo
    - 5% of visitors requested a visitor guide or called the CVB
- 29% of visitors considered choosing other destinations when planning their trips

TRIP PLANNING: WEBSITES/APPS USED

- Over 3 in 4 visitors used websites and apps to plan their trips to the Fort Myers area
- Top websites and apps used to plan their trips include[1]:

33% Airline Websites/Apps



28% Search Engines

22% Airbnb, Vrbo, etc.

19% Booking websites

[1]Multiple responses permitted.

TOP TRIP INFLUENCES

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

91% Warm weather

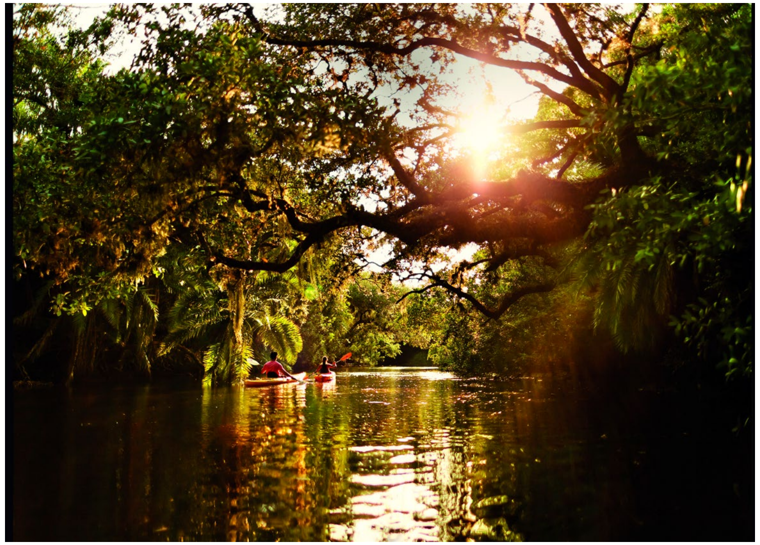
90% Peaceful/relaxing

86% A safe destination

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

TOP REASONS FOR VISITING

- Visitors' top reasons for visiting the Fort Myers area include[1]:



50% Relax & Unwind

42% Beach

35% Visiting Friends & Relatives

[1]Three responses permitted.

PROMOTION RECALL

- **Nearly 2 in 5** visitors **recalled promotions** in the past 6 months for the Fort Myers area
- **19%** of all visitors **were influenced** to come to the Fort Myers area by these promotions
- Top sources of recall include[1]:

44% Internet

35% Social media

18% Traveler reviews, blogs

14% Television

[1]Multiple responses permitted.

BOOKING

- Visitors used the following to **book their trips**:

42% Directly with hotel/condo

16% Vrbo

15% Airbnb

14% Online travel agency

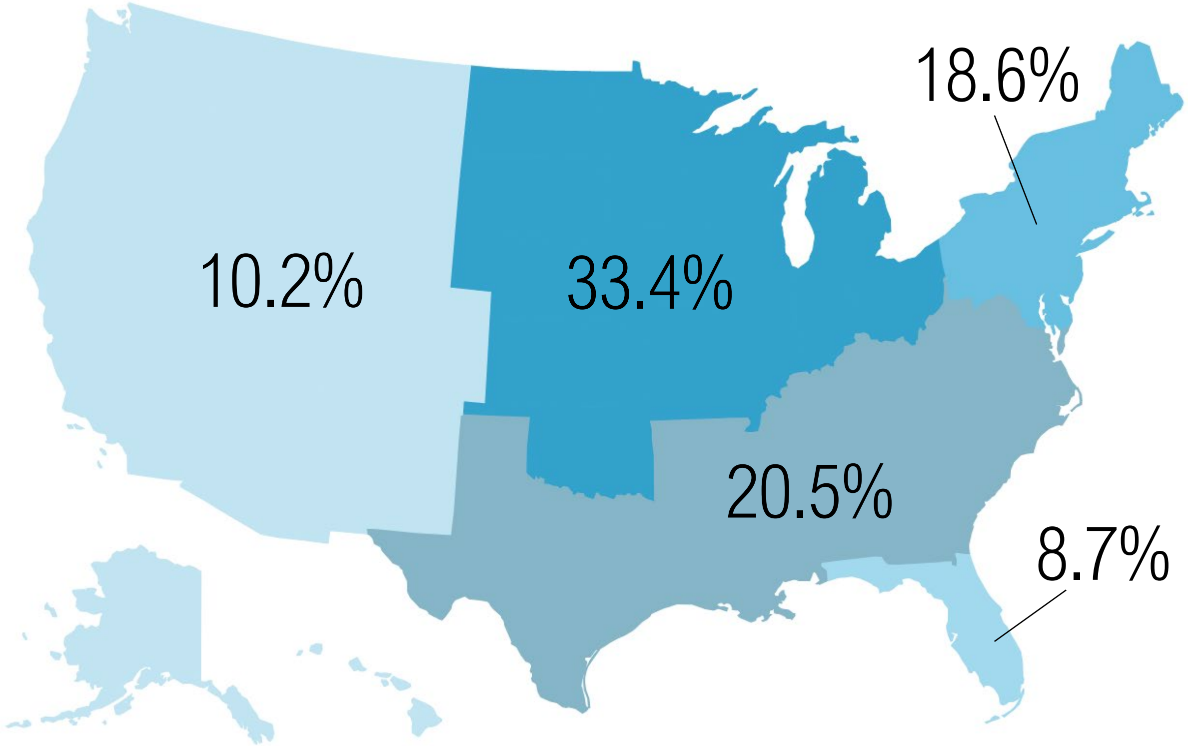
TRANSPORTATION

- 66% of visitors flew to the Fort Myers area
- 53% of all visitors traveled to the Fort Myers area via RSW

VISITOR JOURNEY: TRAVEL PARTY PROFILE

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

ORIGIN REGION[1]



US = 91.4%

Canada – 5.0%

Germany – 1.4%

2.2% Other International Markets

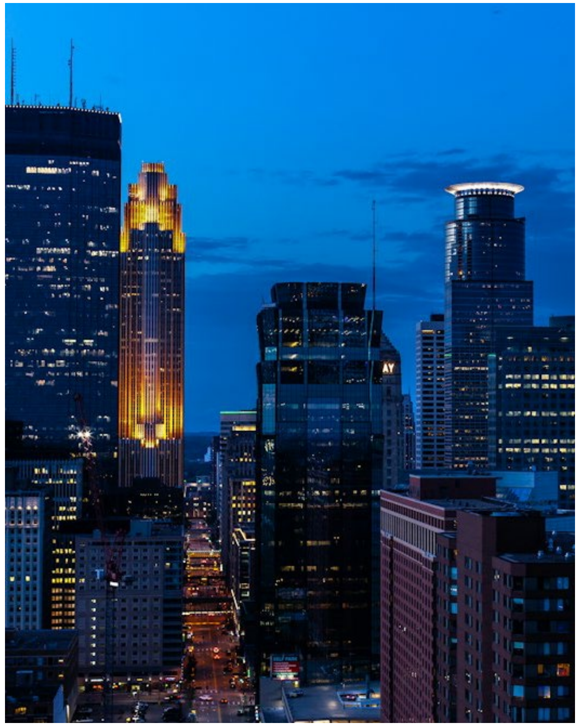
(UK, Other Europe, etc.)

[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers. Based on data from the Visitor Tracking Study.

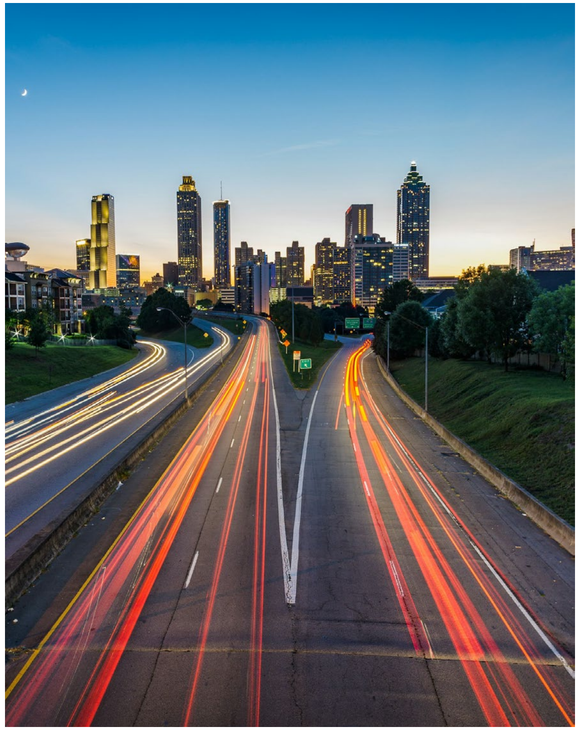
TOP ORIGIN MARKETS[1]

5% New York

5% Chicago



4% Minneapolis – Saint Paul



4% Atlanta

[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers. Based on data from the Visitor Tracking Study.

TRAVEL PARTY SIZE AND COMPOSITION

- Visitors traveled in a party composed of 3.0 people[1]
- 34% traveled with children
- 2 in 5 visitors traveled as a family, and nearly 2 in 5 visitors traveled as a couple

[1]Sources: Occupancy Study and Visitor Tracking Study

DEMOGRAPHIC PROFILE[1]

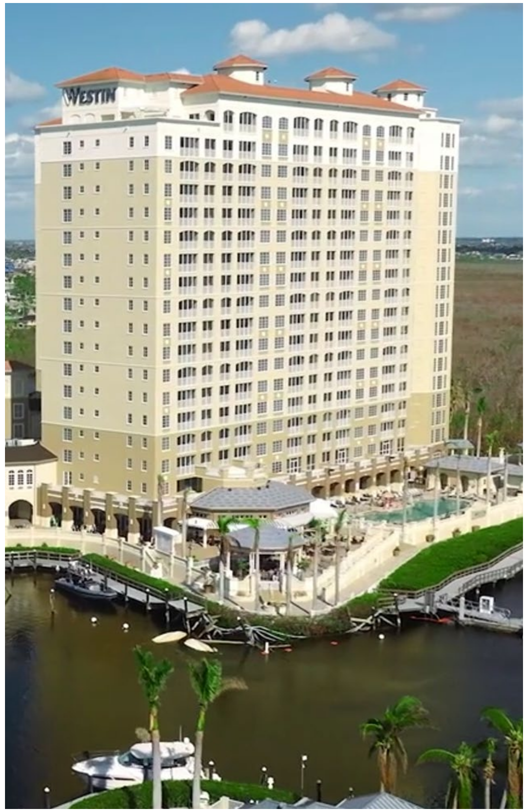
April - June Visitors:

- Median age of 50 years old
- Median household income of $106,800
- Married (78%)
- College educated (70%)
- Caucasian/white (80%)

Visitor Journey: Trip Experience

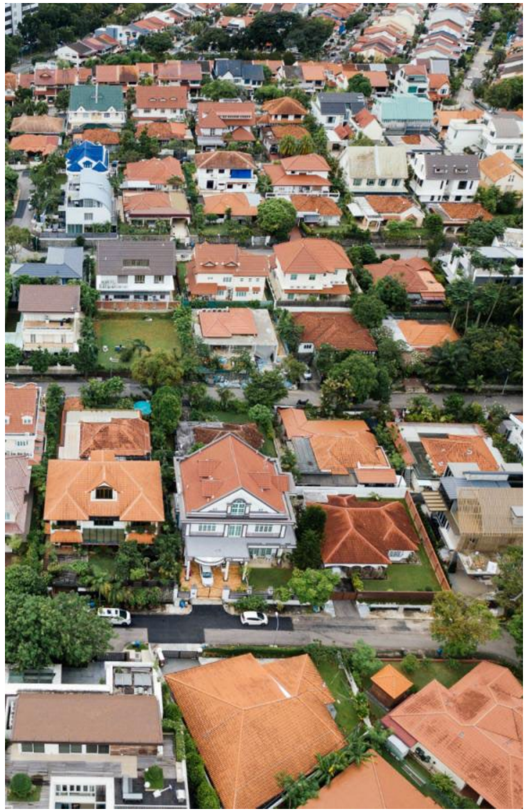
TOP ACCOMMODATIONS

32% Vacation Rental



31% Hotel/Motel/Resort

18% Personal second home, etc.



15% Staying with friends/relatives

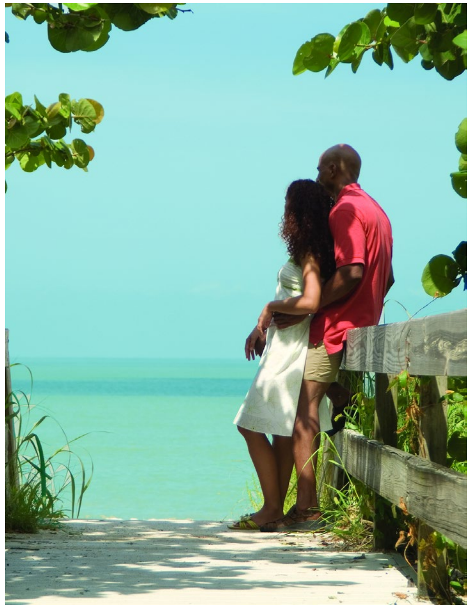
LENGTH OF STAY & NUMBER OF TIMES IN DESTINATION

- Visitors[1] spent an average of 6.2 nights in the Fort Myers area
- 26% were first time visitors
- 20% have visited more than 10 times

[1]Sources: Occupancy Study and Visitor Tracking Study

VISITOR ACTIVITIES

- Top visitor activities include[1]:



72% Relaxing & unwinding

68% Beach

63% Dining out

51% Visit friends/relatives

39% Shopping

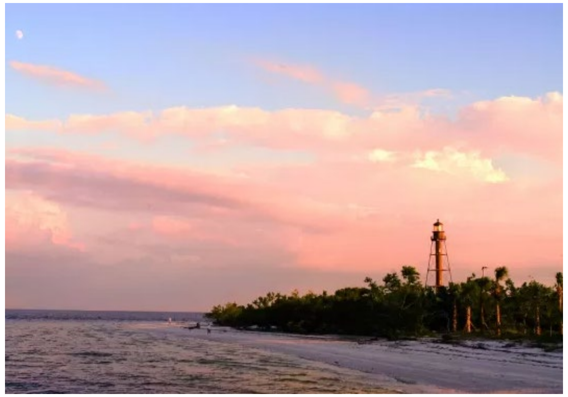
[1]Multiple responses permitted.

TOP ATTRACTIONS VISITED[1]

68% Beaches

29% Bell Tower Shops

26% Edison & Ford Estates



26% Sanibel Lighthouse

[1]Multiple responses permitted.

TOP COMMUNITIES STAYED

33% Fort Myers

18% Cape Coral

11% Fort Myers Beach

11% Bonita Springs

VISITOR JOURNEY: POST-TRIP EVALUATION

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

SATISFACTION

- 93% of visitors are likely to recommend the area
  - 49% are very likely to recommend
- 91% of visitors are likely to return
  - 53% are very likely to return
- 73% of visitors are likely to return next year
  - 47% are very likely to return next year

SATISFACTION

- **96%** of visitors were **satisfied or very satisfied with their overall visit** to the Fort Myers area (57% were very satisfied)
- **95%** of visitors were **satisfied or very satisfied with customer service** on their visit (56% were very satisfied)
- **95%** of visitors said paid accommodations **at least met their expectations** (45% said they exceeded expectations)

TOP ATTRIBUTE RATINGS

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

96% Warm weather

95% Peaceful/relaxing

93% A safe destination

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

VISITOR CONCERNS

- 1 in 3 visitors mentioned traffic as their least favorite part of their visit

- Nearly 1 in 4 visitors mentioned damaged buildings, etc. from Ian, while 16% of visitors mentioned construction noise or insects.

- Nearly 1 in 4 visitors said there was nothing they disliked about the area during their visit.

AREA DESCRIPTIONS

Warm Weather

"Wonderful time on vacation in our favorite destination, with great weather, sunshine, beautiful beaches, and gorgeous coastline."

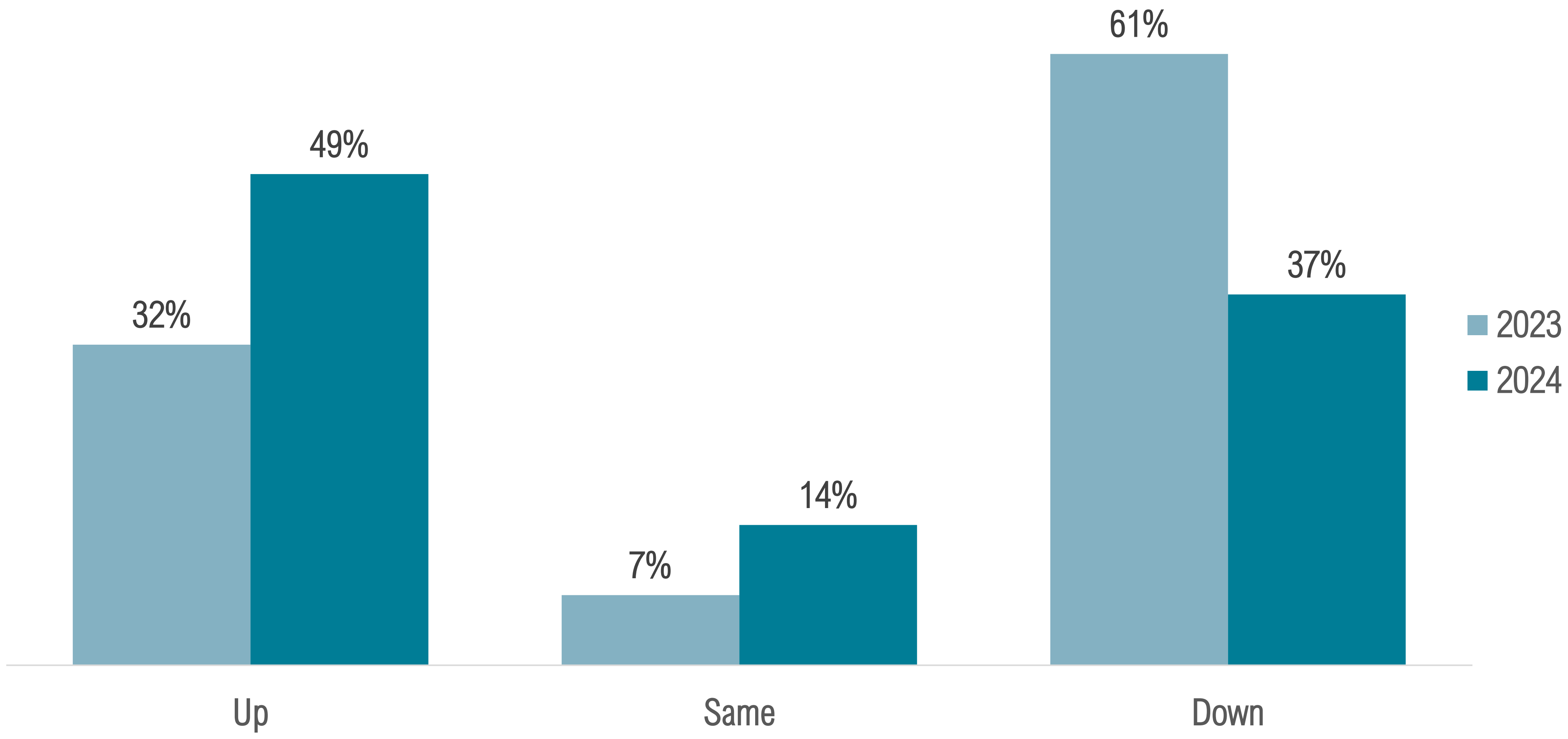
Peaceful/relaxing

"Resort was peaceful and relaxing. Great place to chill and unwind in the beautiful warm weather."

Safe Destination

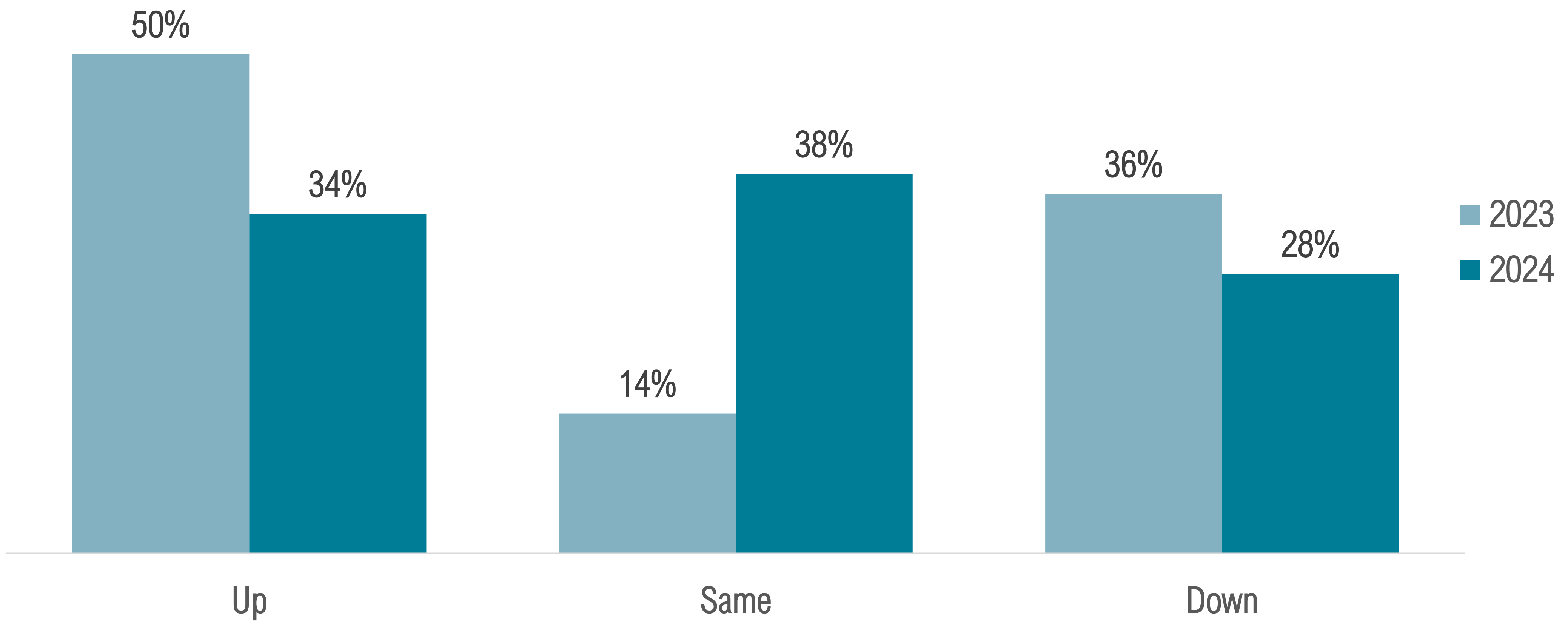
"It is a very friendly and safe, family-oriented area, but there is quite a bit of seaweed on the beaches. The restaurants and shopping are great, and the attractions are very interesting."

OCCUPANCY BAROMETER[1]: JUL – SEP RESERVATIONS



[1]Sources: Occupancy Survey
Accommodations partners were asked the following, "Please think about your reservations for the next three months. Compared to July through September of 2023, would you say the total level of reservations are up, the same, or down?"

OCCUPANCY BAROMETER[1]: OCT – DEC RESERVATIONS



[1]Sources: Occupancy Survey

Accommodations partners were asked the following, "Please think about your reservations for the next three months. Compared to October through December of 2023, would you say the total level of reservations are up, the same, or down?"

Detailed Findings

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

Pre-Visit

Travel Party Profile

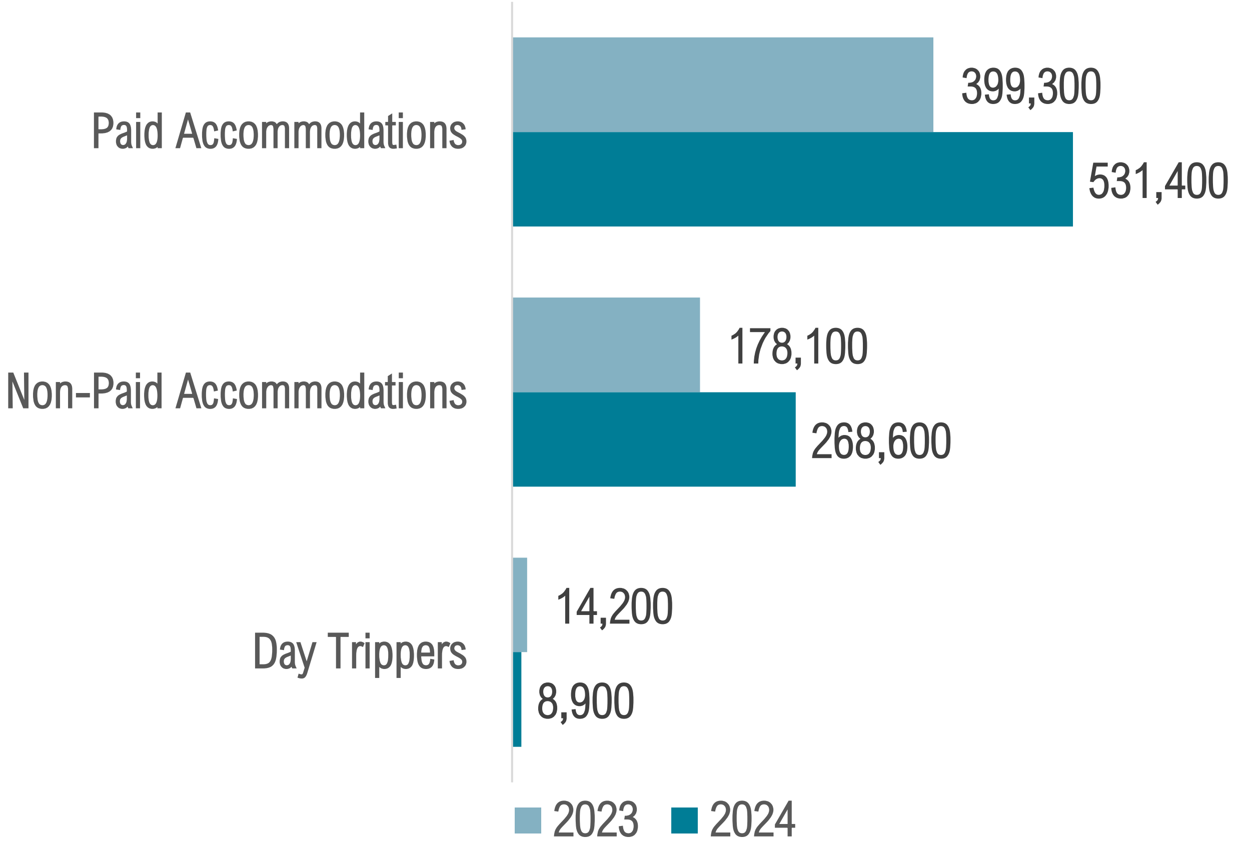
Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

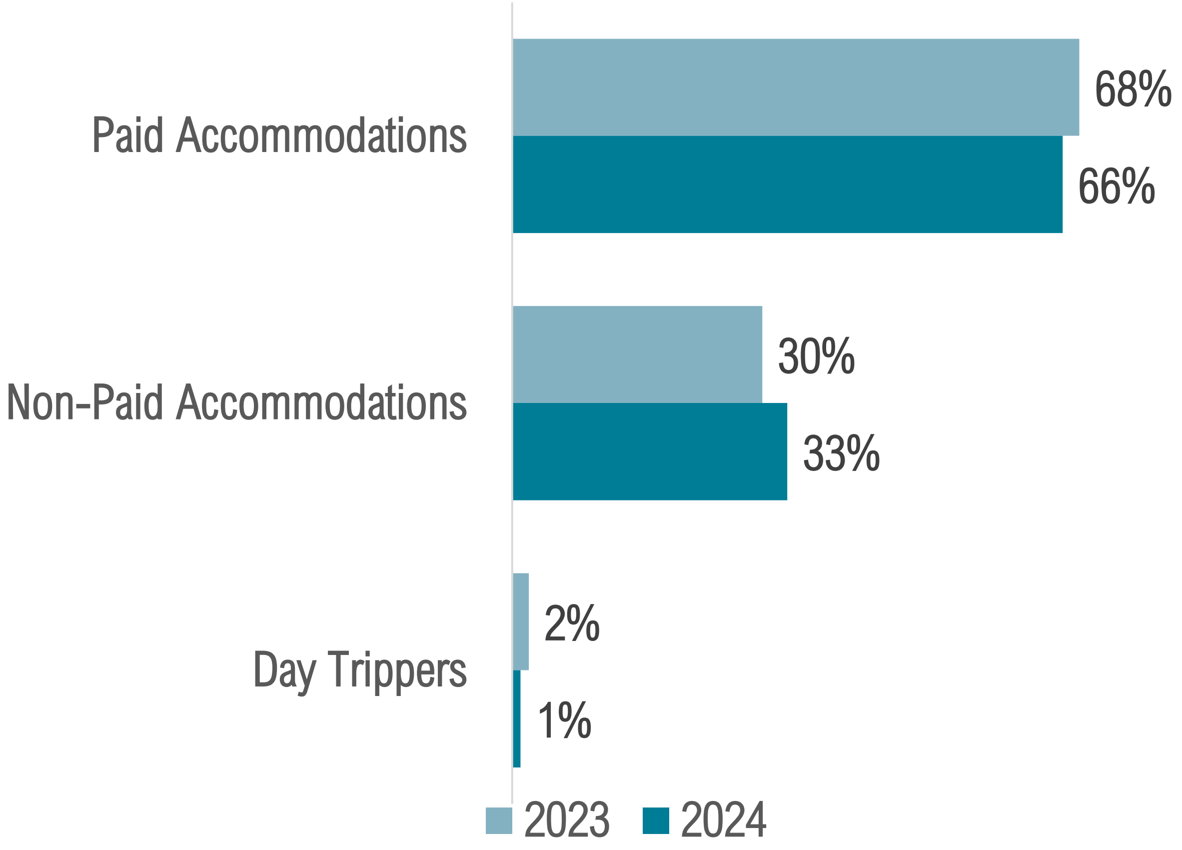
NUMBER OF VISITORS

There were 808,900[1] visitors to the Fort Myers area in Apr - Jun 2024 (+36.7% from 2023).



VISITOR TYPE

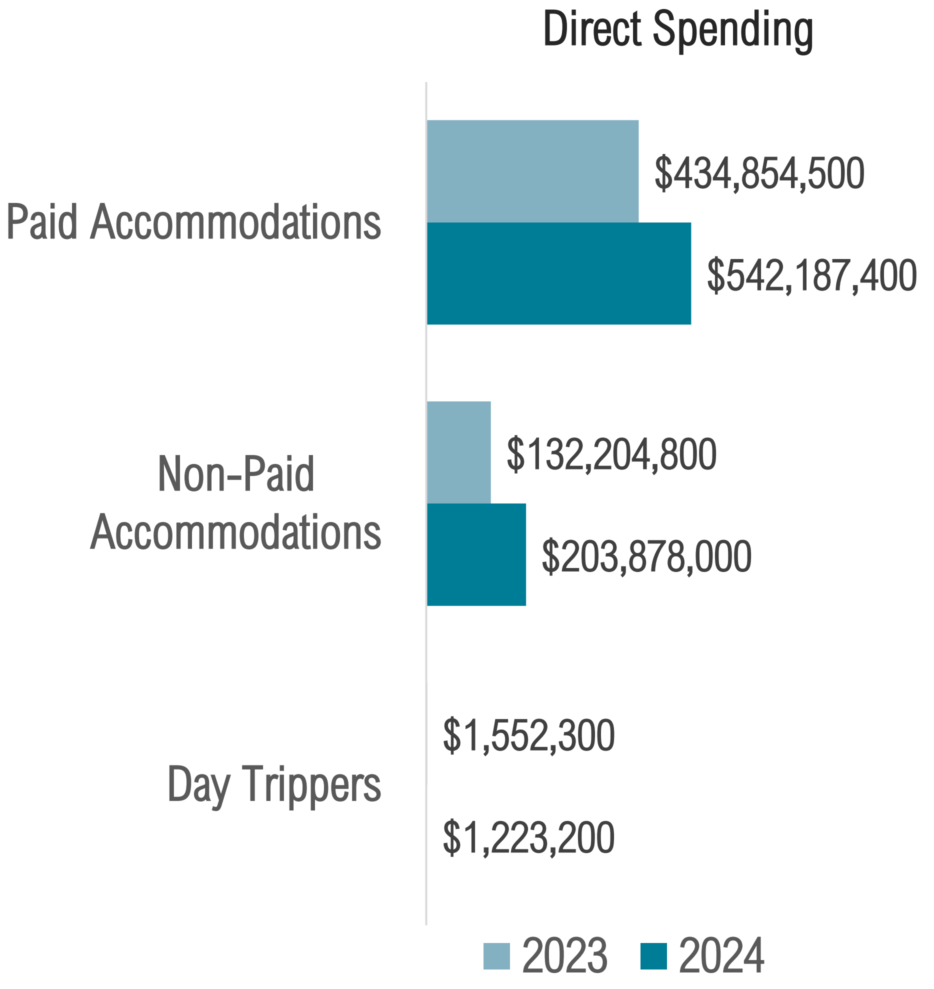
Visitors staying in paid accommodations accounted for **2 in 3** visitors.



VISITOR EXPENDITURES BY VISITOR TYPE

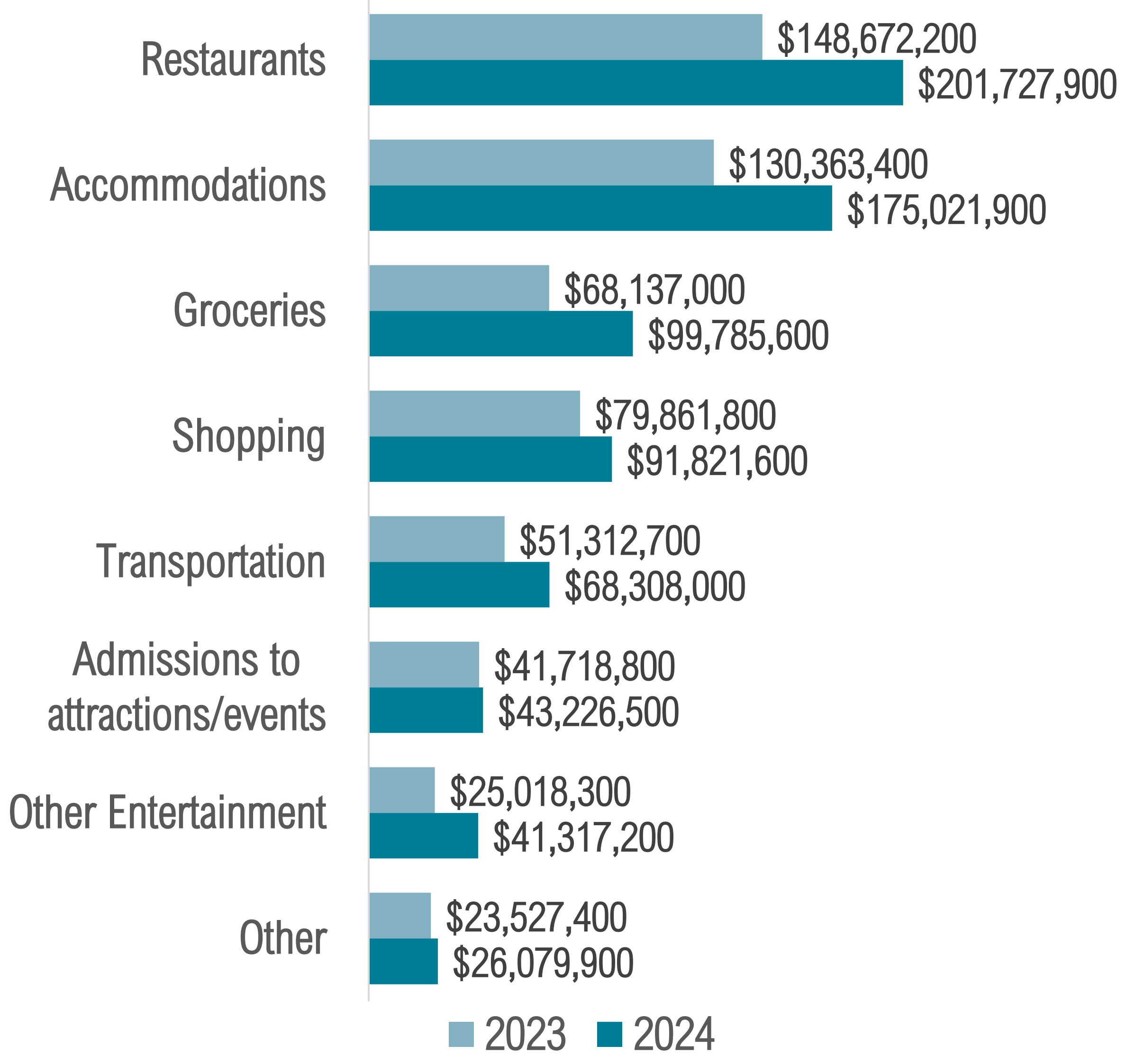
Apr - Jun visitors spent $747,288,600 in the Fort Myers area, resulting in a total economic impact of $1,190,430,700, up 30.8% from 2023.

Visitors staying in paid accommodations accounted for 66% of all visitors and 73% of all spending.



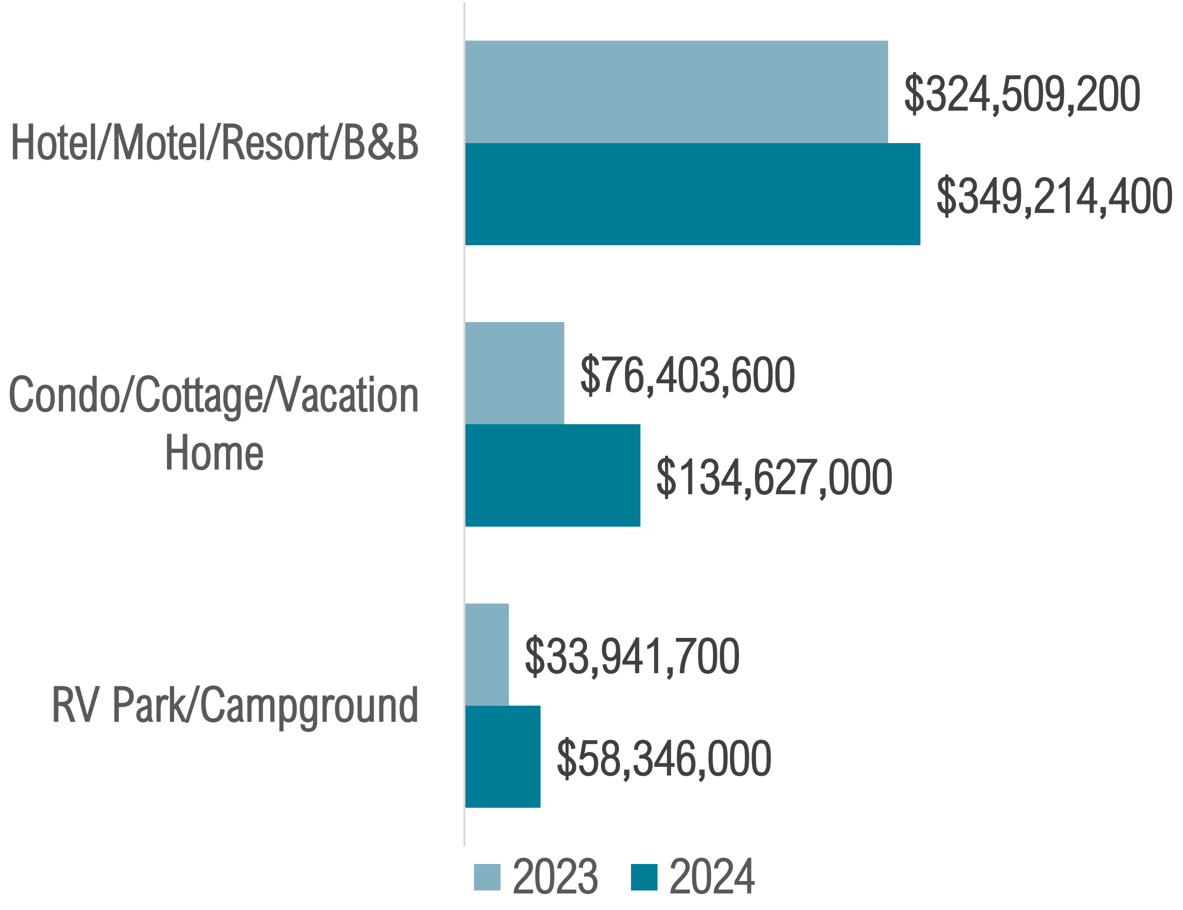
VISITOR EXPENDITURES BY SPENDING CATEGORY

Of the $747,288,600 visitors spent in the Fort Myers area, 27% was spent on restaurants and 23% was spent on accommodations, accounting for half of all visitor spending.



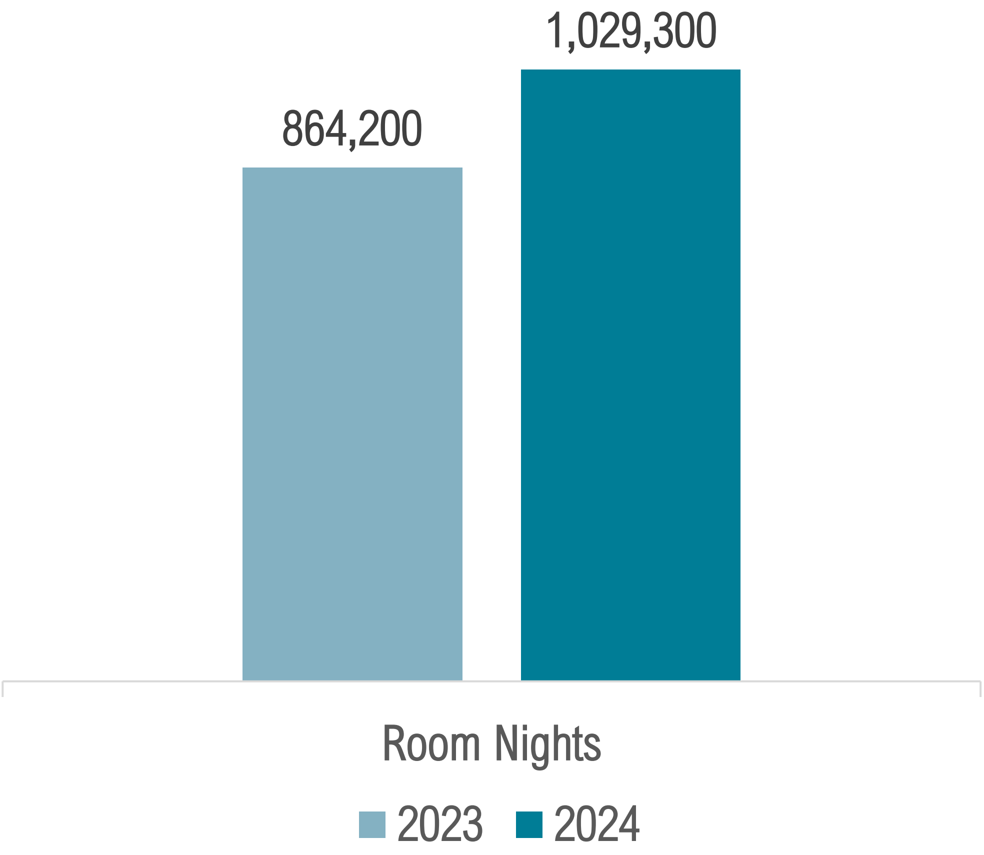
VISITOR EXPENDITURES BY LODGING TYPE

Apr - Jun visitors staying in paid accommodations spent $542,187,400 in the Fort Myers area.



ROOM NIGHTS GENERATED

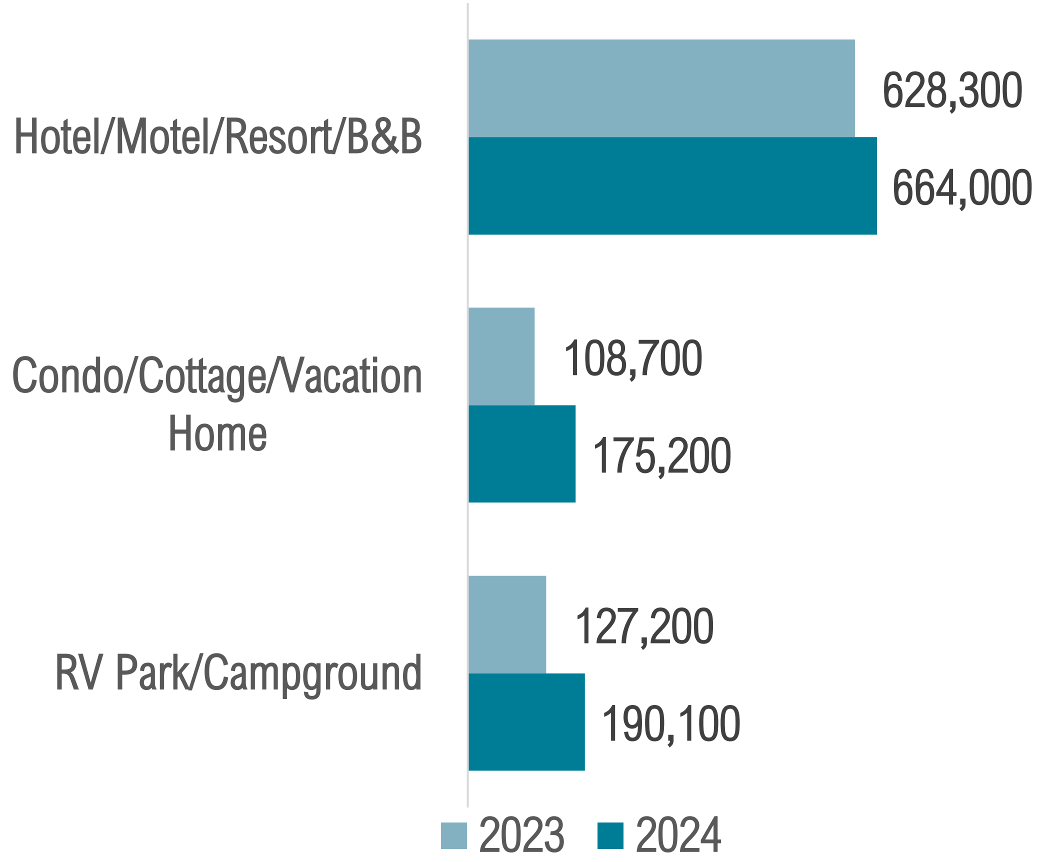
Apr-Jun visitors spent **1,029,300**[1] nights in Fort Myers area hotels, resorts, condos, rental houses, RV parks, etc. (+19.1% from 2023).



[1]Source: Occupancy Study, STR, and KeyData

ROOM NIGHTS GENERATED

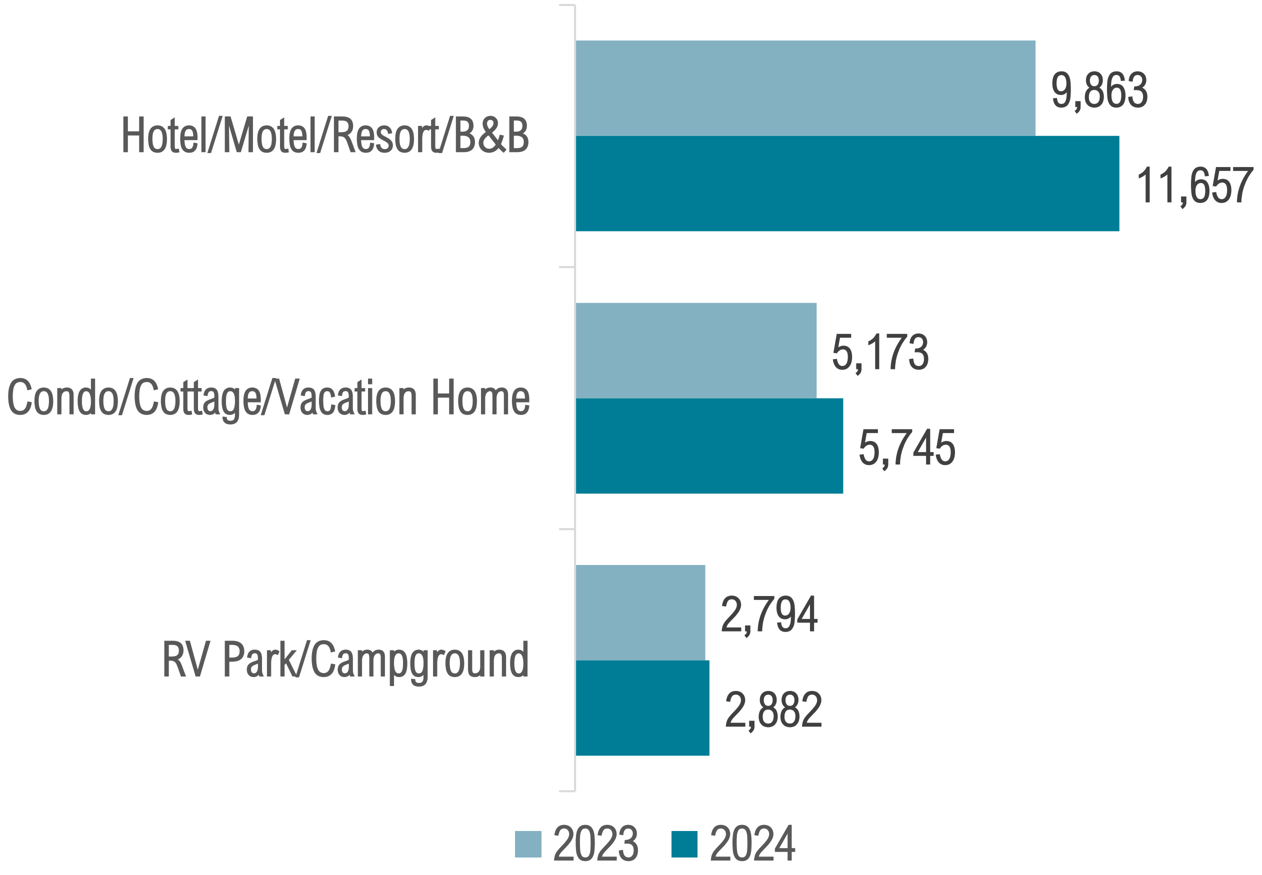
Hotels, motels, etc. accounted for **nearly 2 in 3** room nights spent in the Fort Myers area, while RV parks/campgrounds accounted for **19%** and vacation rentals accounted for the remaining **17%** of nights that visitors spent in the area.



[1]Source: Occupancy Study, STR, and KeyData

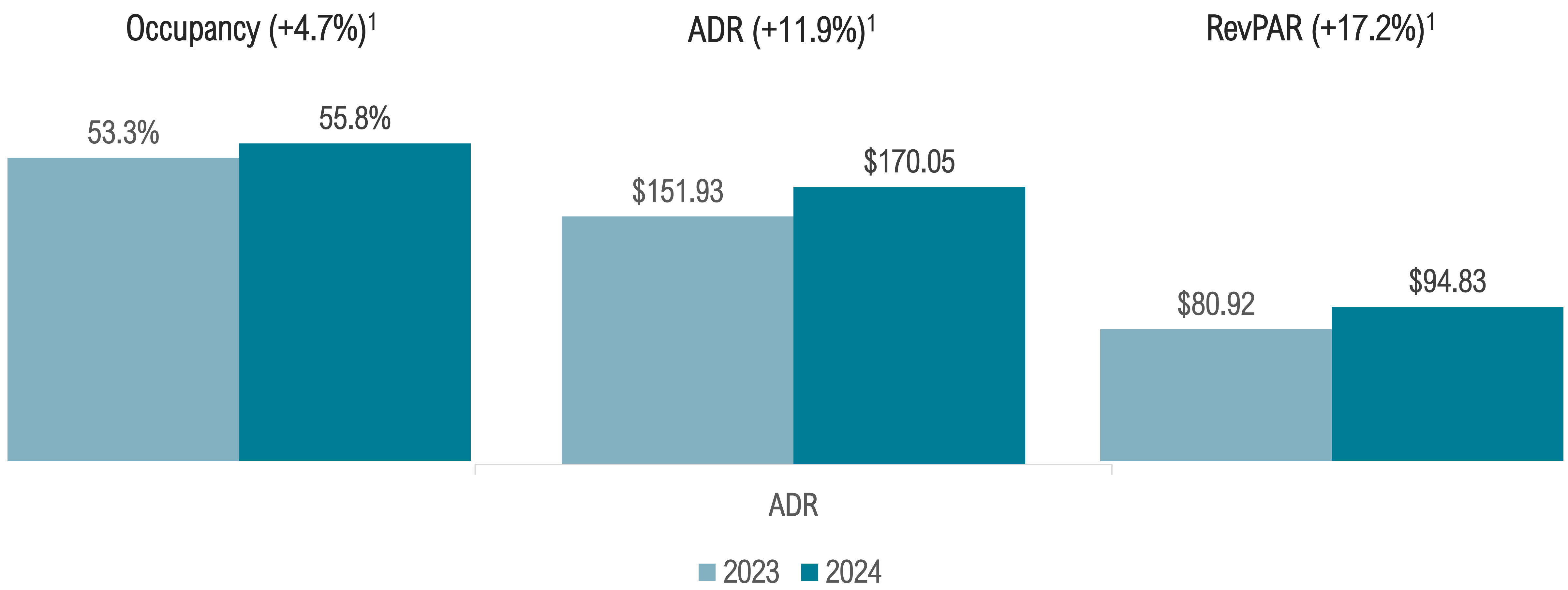
AVAILABLE UNITS

There were 20,284[1] available units in Apr - Jun 2024 vs. 17,830 in 2023 (+13.8%). Nearly 3 in 5 units available were from hotels, motels, etc.



[1]Source: Occupancy Study, STR, and KeyData

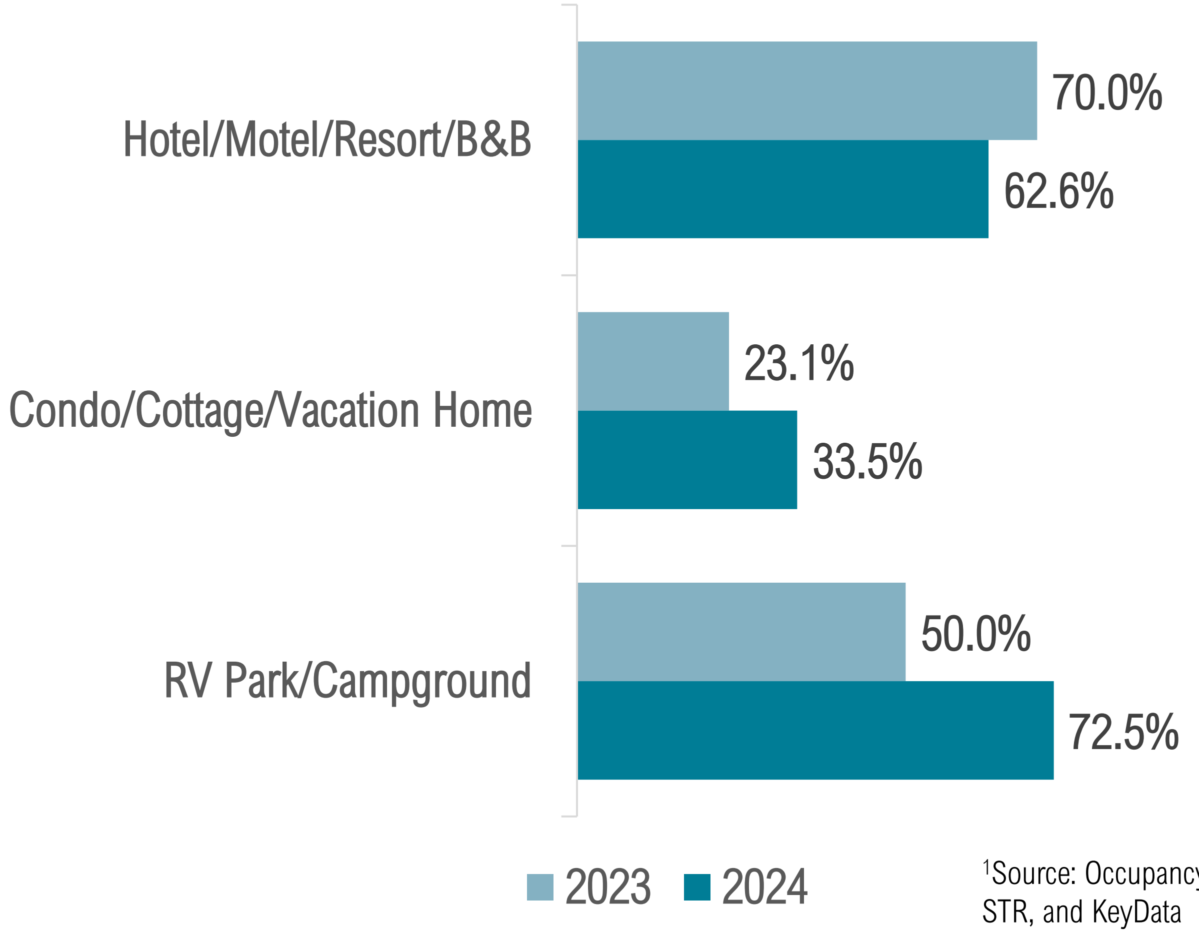
OCCUPANCY, ADR AND REVPAR



[1]Source: Occupancy Study, STR, and KeyData

OCCUPANCY

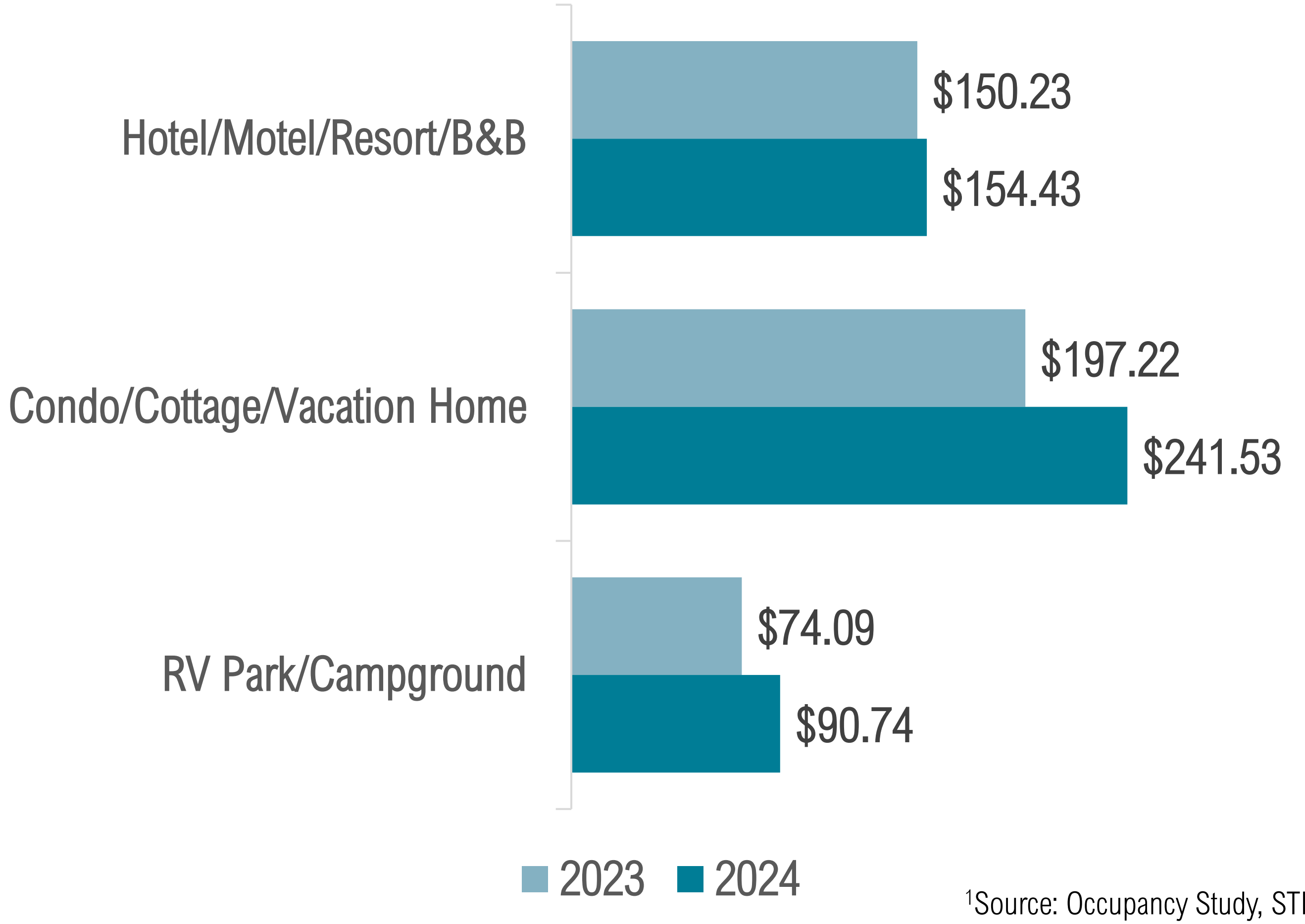
Average occupancy in April-June was 55.8%[1] (53.3% in 2023).



[1]Source: Occupancy Study, STR, and KeyData

ADR

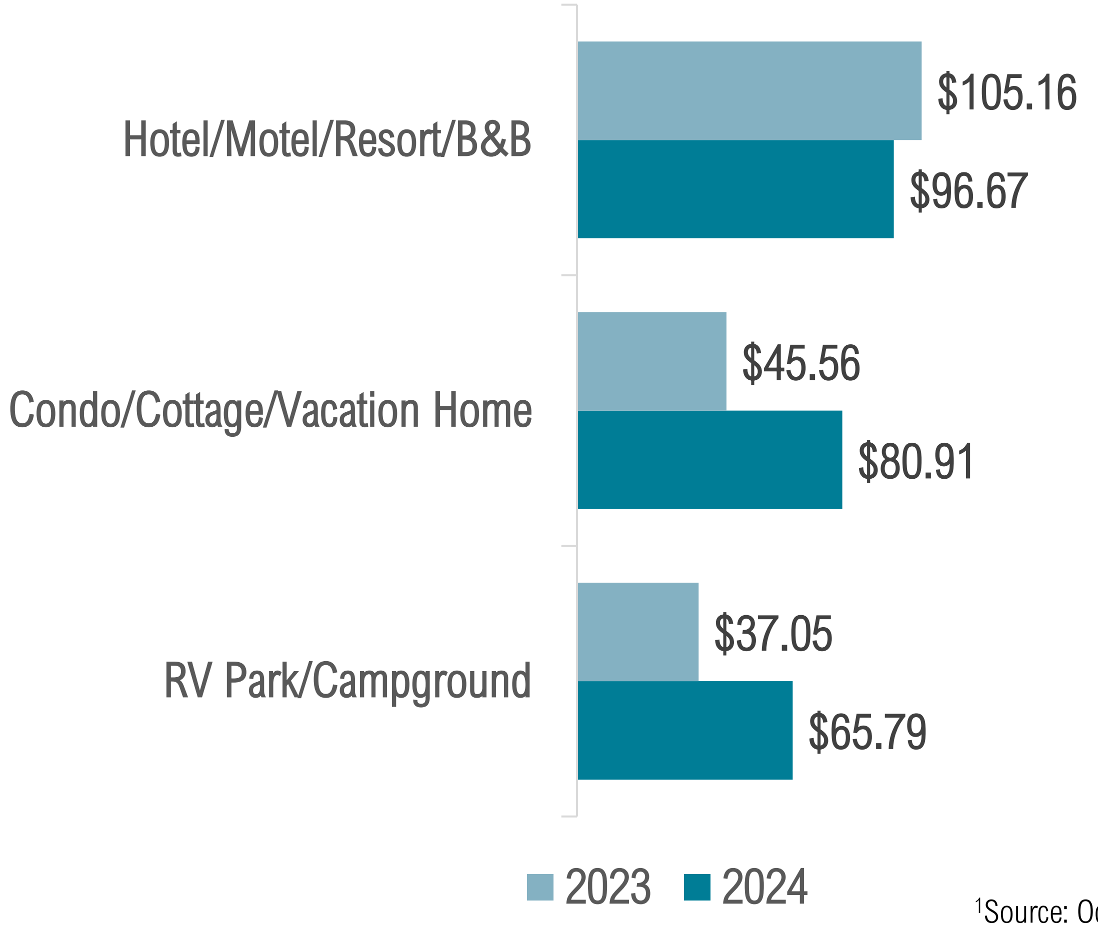
ADR in April-June was **$170.05**[1] ($151.93 in 2023).



[1]Source: Occupancy Study, STR, and KeyData

REVPAR

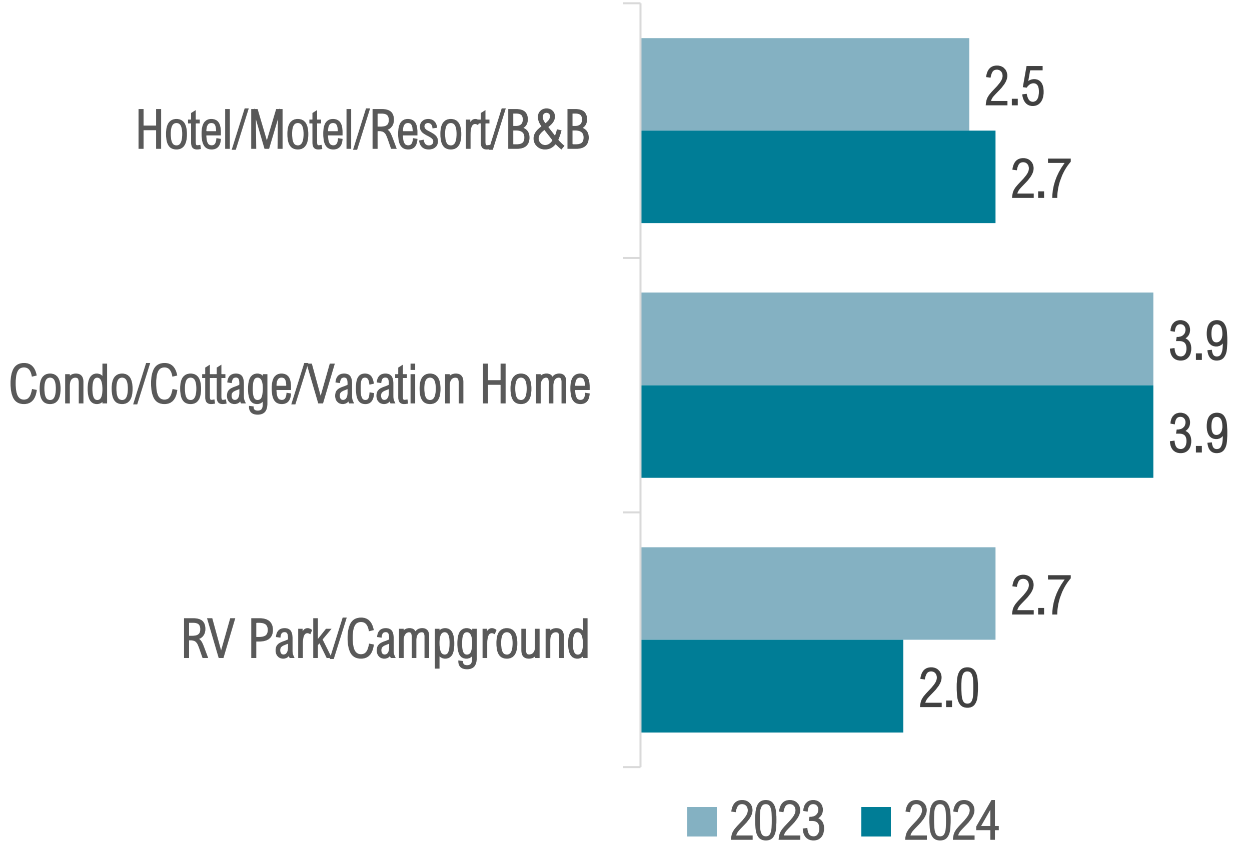
Average RevPAR in April-June was $94.83[1] ($80.92 in 2023).



[1]Source: Occupancy Study, STR, and KeyData

TRAVEL PARTY SIZE

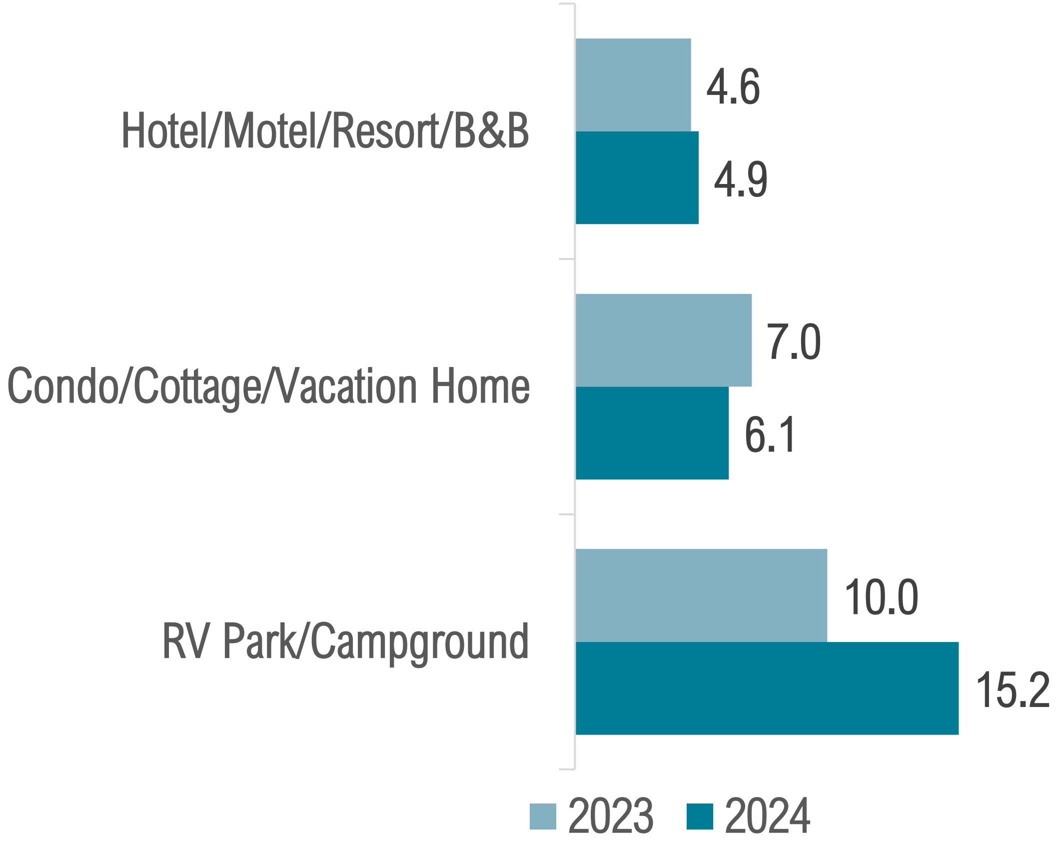
For visitors in paid accommodations, average travel party size in April-June was **2.9 people**[1] (2.7 people in 2023).



[1]Source: Occupancy Study, STR, and KeyData

LENGTH OF STAY

For visitors in paid accommodations, average length of stay in April-June was **5.7 nights**[1] (5.9 nights in 2023).



[1]Source: Occupancy Study, STR, and KeyData

Visitor Journey: Pre-Visit

Pre-Visit

Travel Party Profile

Trip Experience

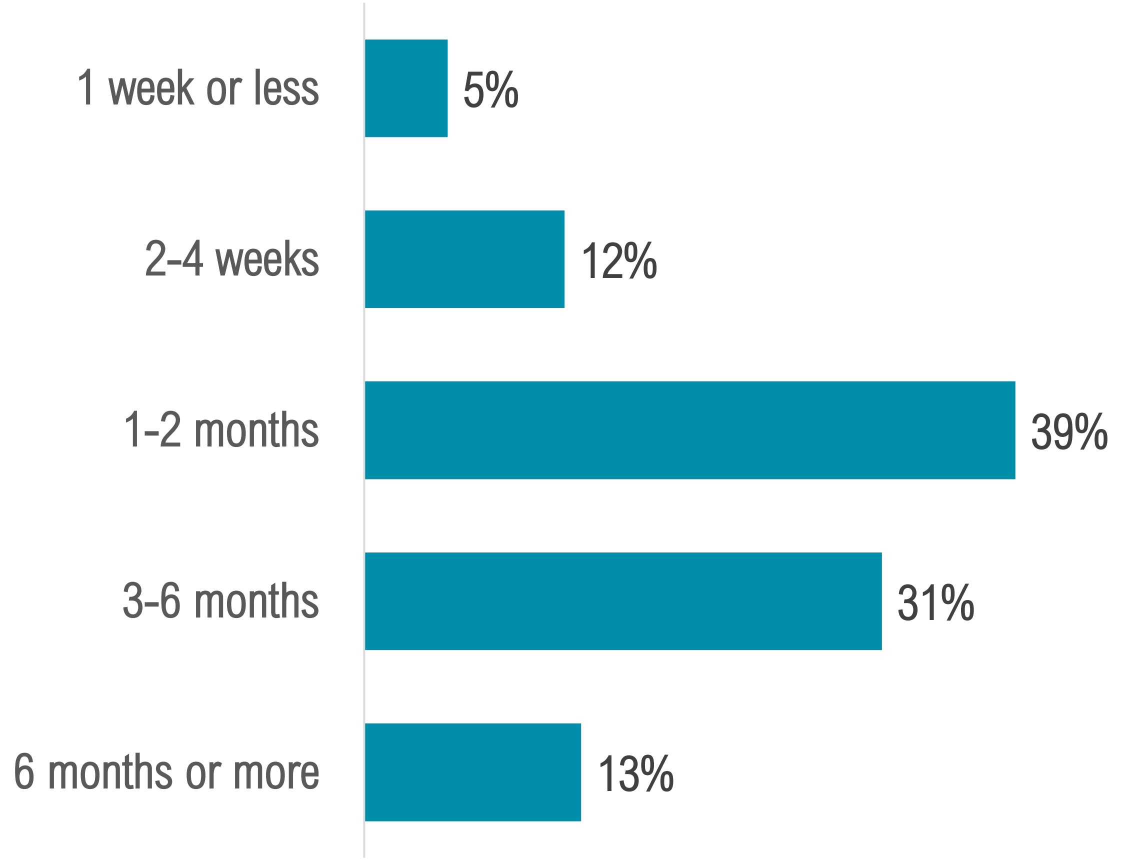
Post-Trip Evaluation

Economic Impact on Destination

TRIP PLANNING CYCLE

Nearly 2 in 5 visitors planned their trip 1-2 months in advance, while nearly 1 in 3 visitors planned their trip 3-6 months in advance.

The median trip planning cycle lasted nearly 2 months (55 days).

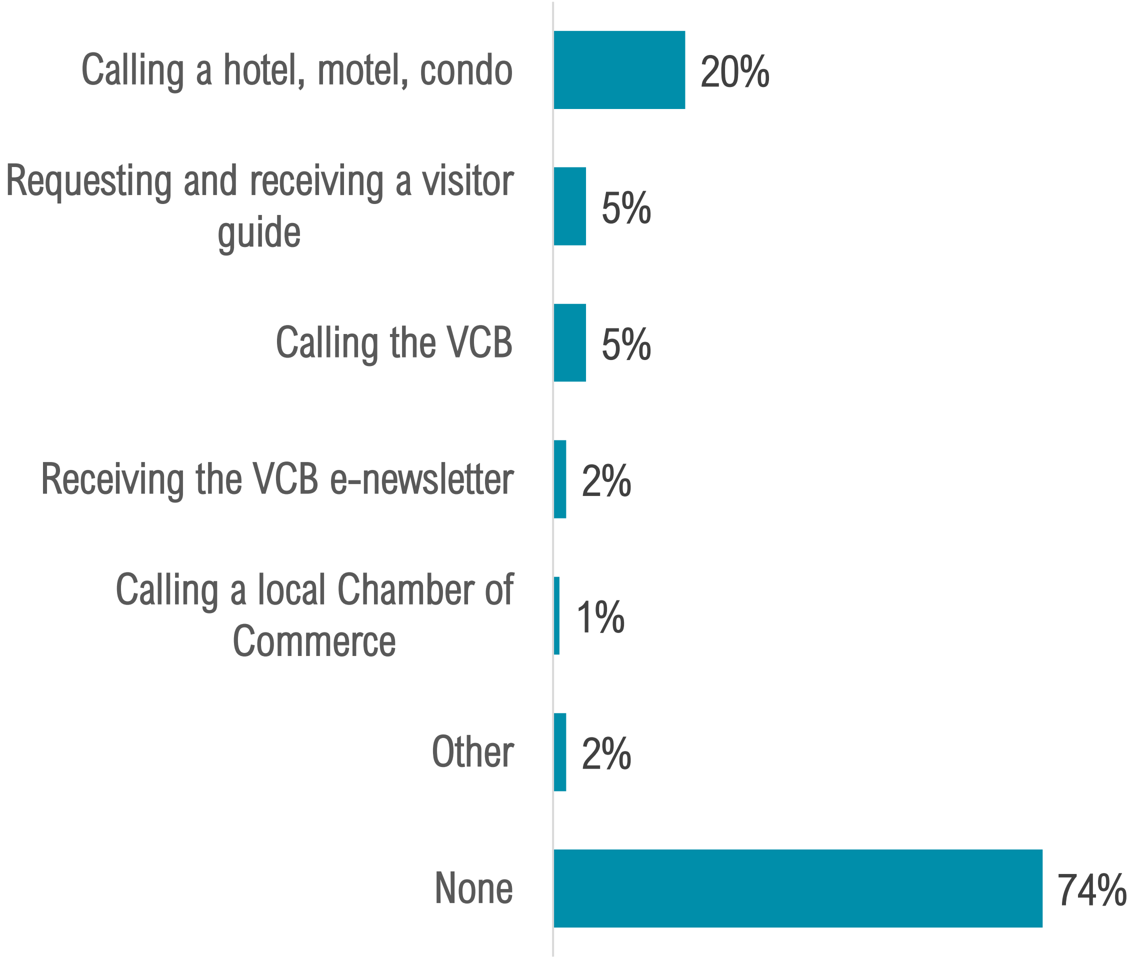


TRIP PLANNING: INFORMATION REQUESTS[1]

1 in 4 visitors made **information requests** while planning their trip to the Fort Myers area.

Visitors who sought information prior to their trips were most likely to rely on **lodging properties** for that information.

The share of visitors requesting information in Q2 2024 was lower than in Q2 2023.



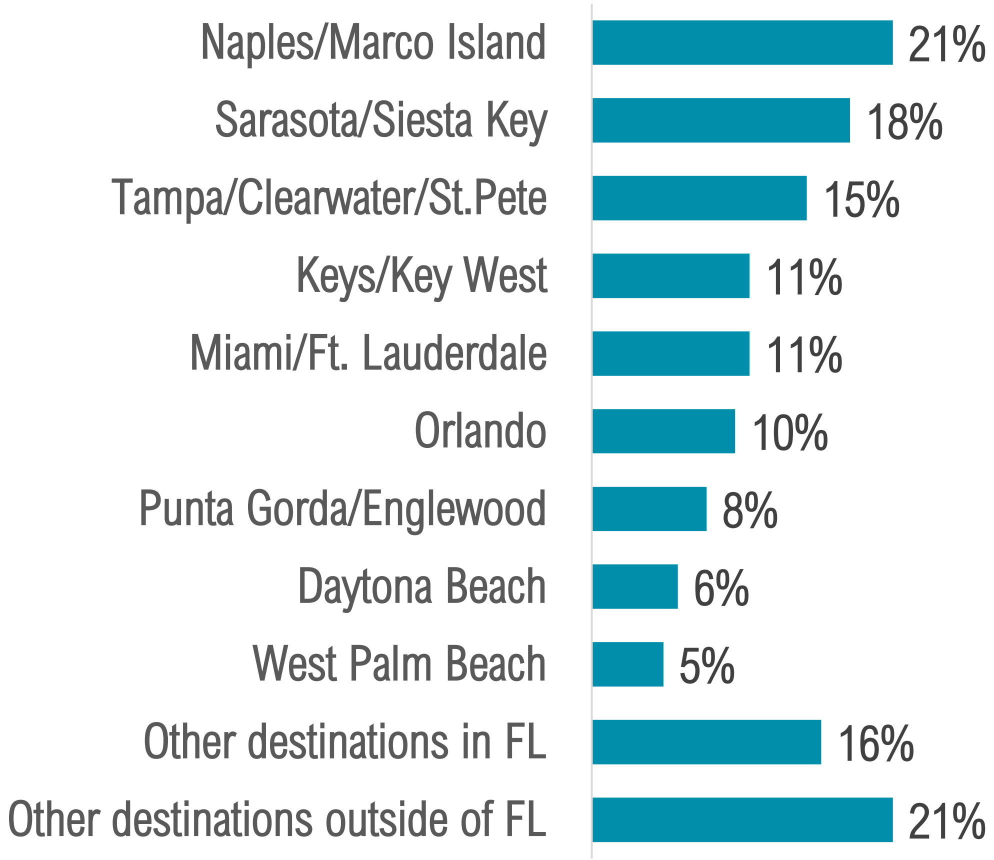
[1]Multiple responses permitted.

TRIP PLANNING: OTHER DESTINATIONS CONSIDERED[1]

Most alternate destinations considered were in Florida.

Over 1 in 5 visitors considered visiting the Naples/Marco Island area.

BASE: 29% of visitors who considered other destinations



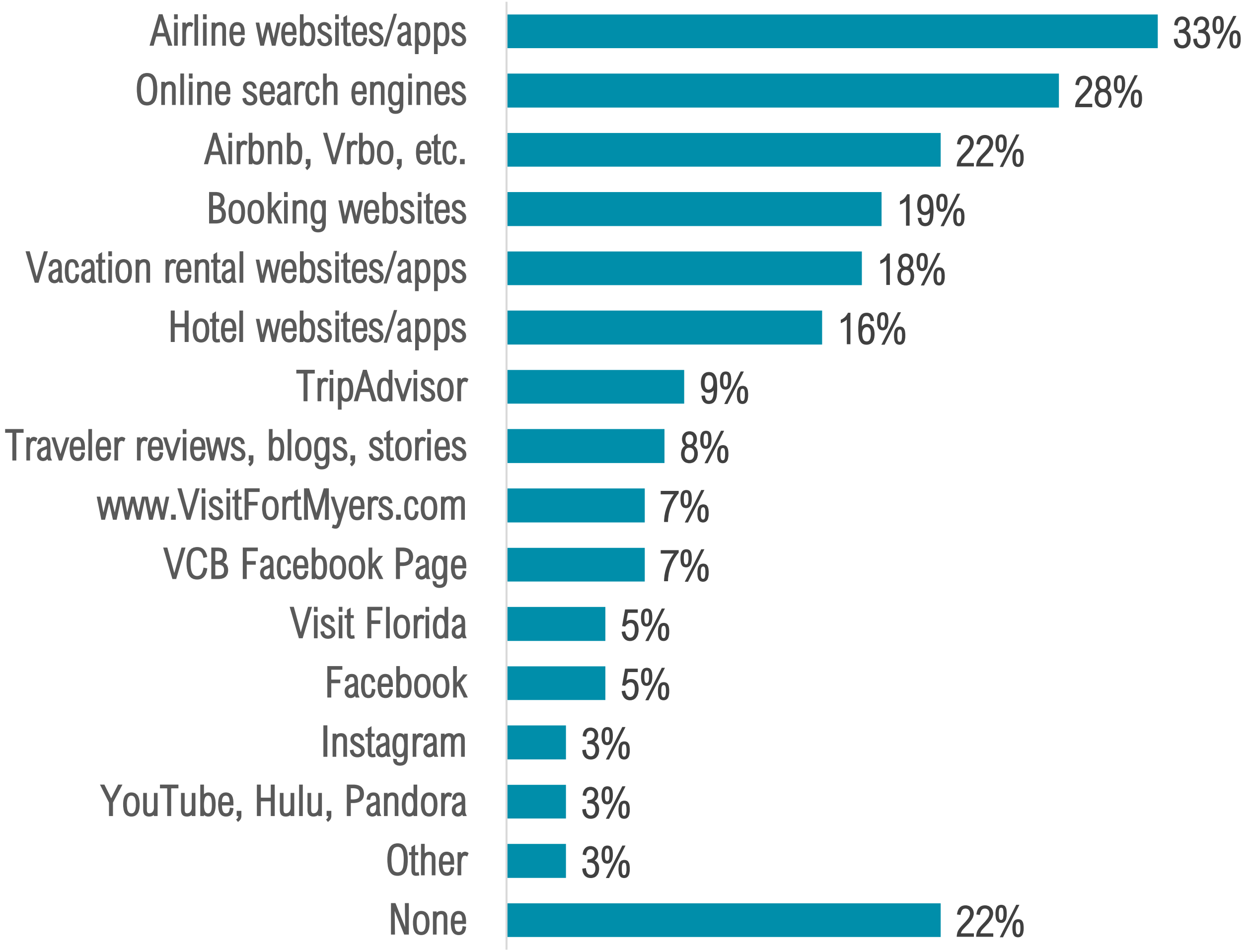
[1]Multiple responses permitted.

TRIP PLANNING: WEBSITES/APPS USED[1]

Over 3 in 4 visitors used **websites and apps** to plan their trip to the Fort Myers area.

Visitors were most likely to use **airline websites/apps** or **online search engines** to plan their trips.

Visitors also utilized **Airbnb & Vrbo (22%), booking websites/apps (19%),** and **vacation rental websites/apps (18%)** to plan their trips.

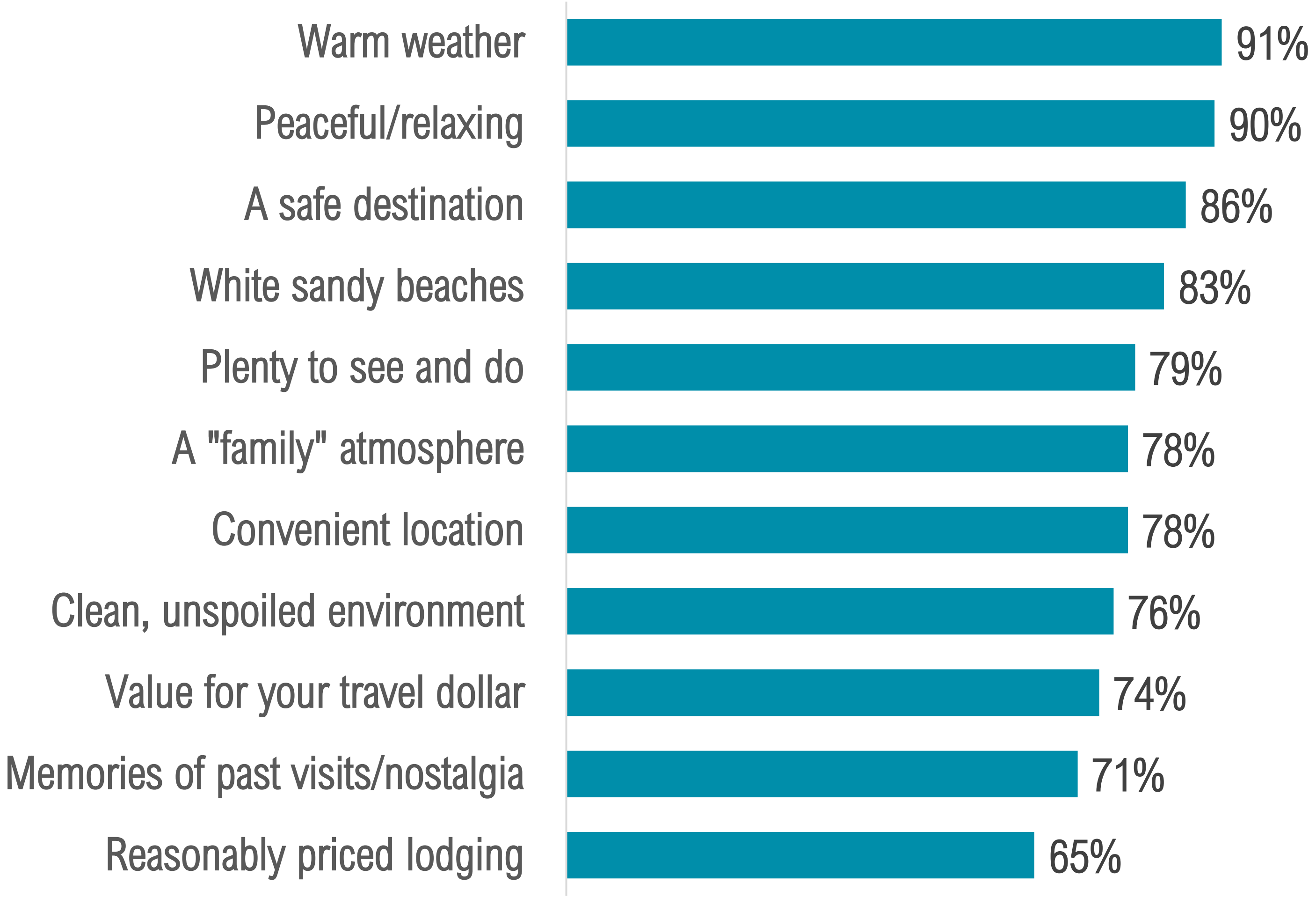


[1]Multiple responses permitted.

TRIP INFLUENCERS[1]

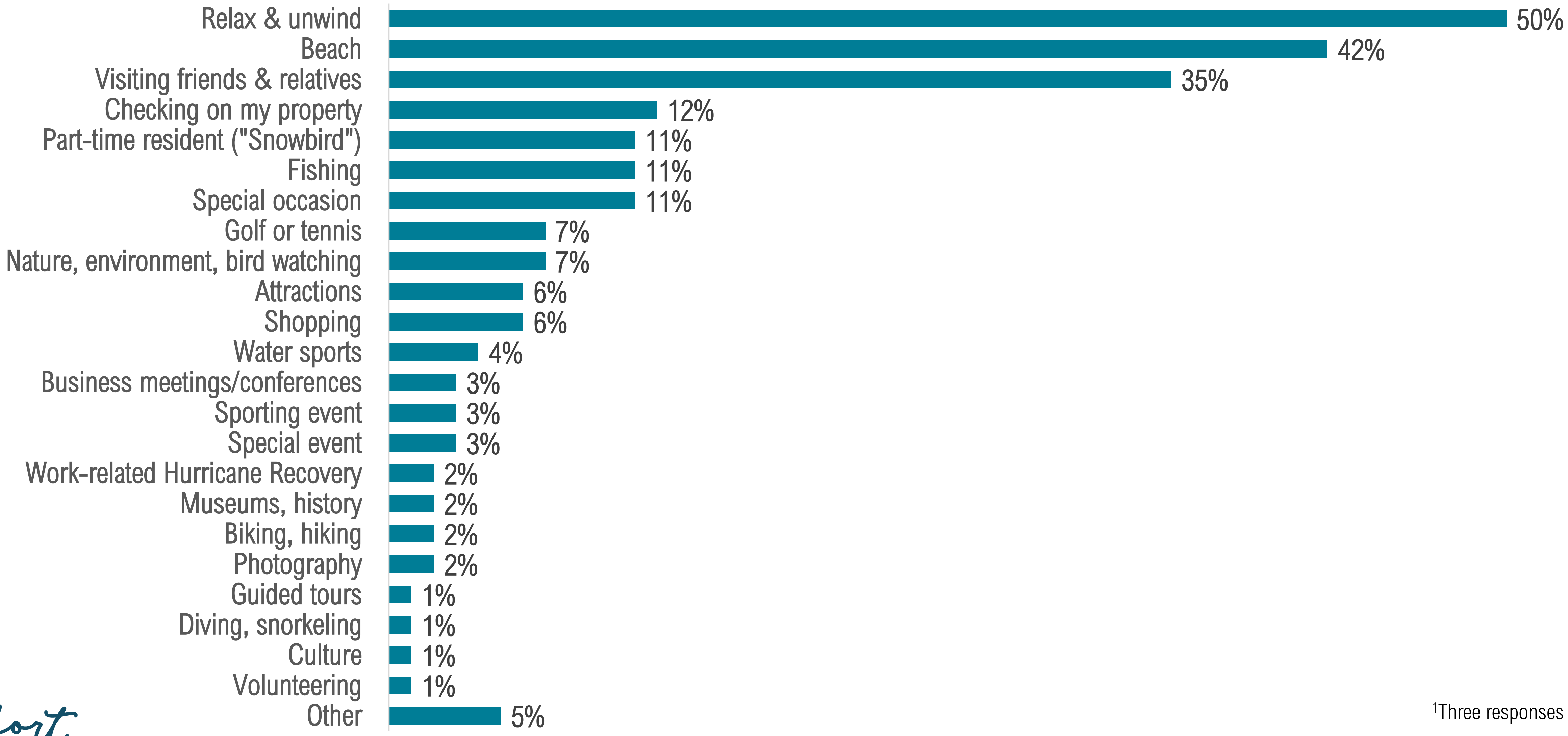
Visitors were heavily influenced by the **warm weather, peacefulness,** and **safety** in the Fort Myers area when thinking about visiting.

The **beaches** (+11% points), the **environment** (+10% points), and the **value for travel dollar** (+7% points) saw the largest increases.



[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]



[1]Three responses permitted.

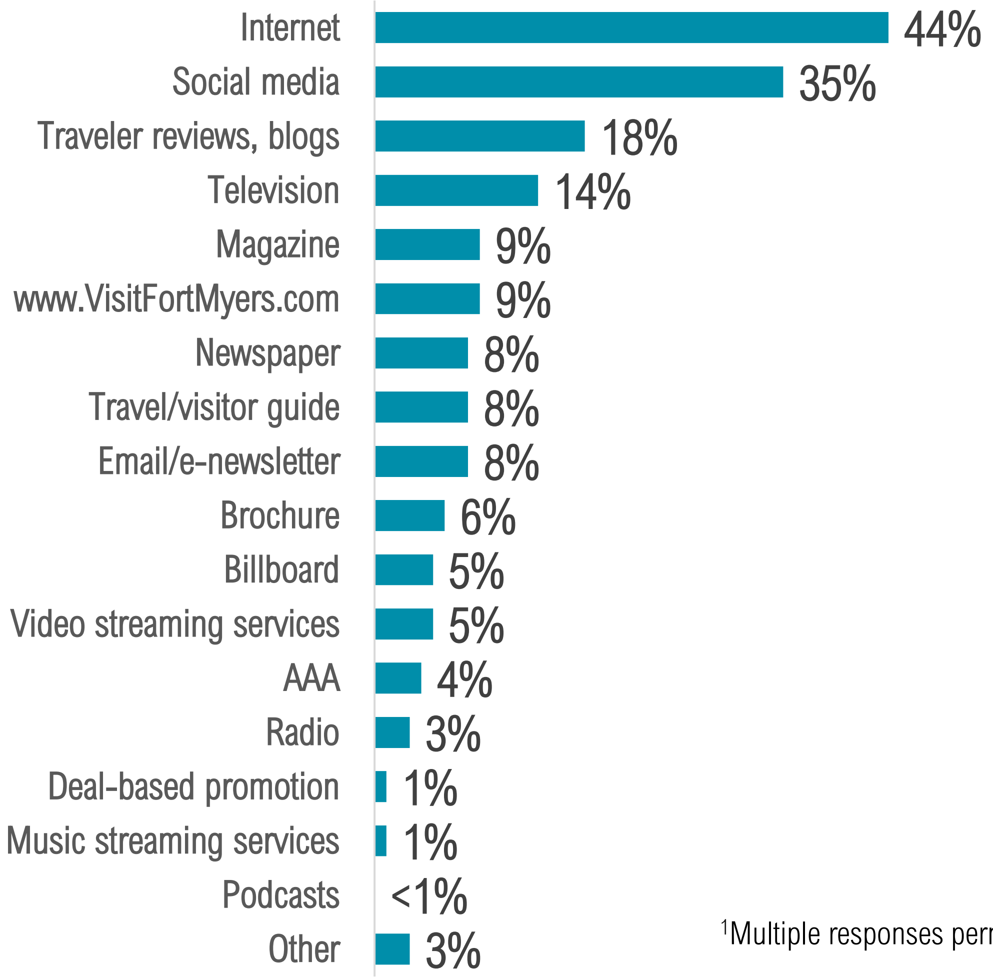
PROMOTIONS RECALL[1]

37% of visitors **recalled promotions** in the past 6 months for the Fort Myers area.

This influenced 19% of all visitors to come to the Fort Myers area.

BASE: 37% of visitors who recalled promotions

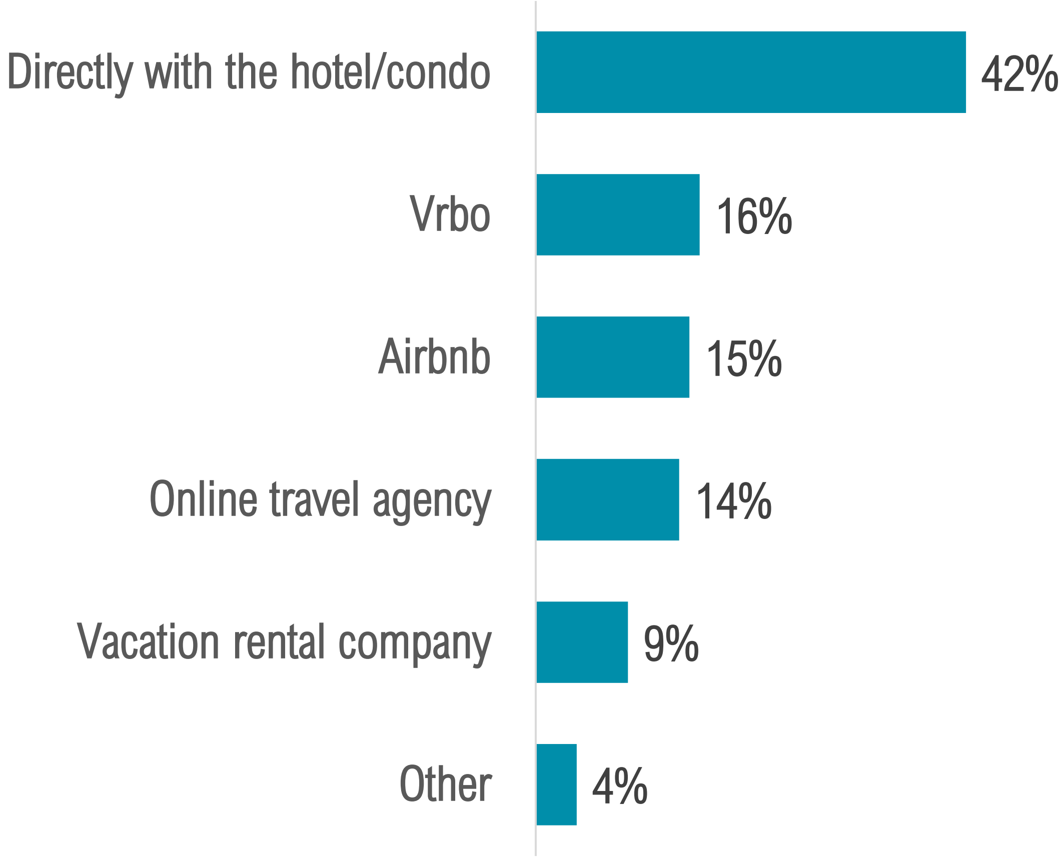
Source of Promotion



[1]Multiple responses permitted.

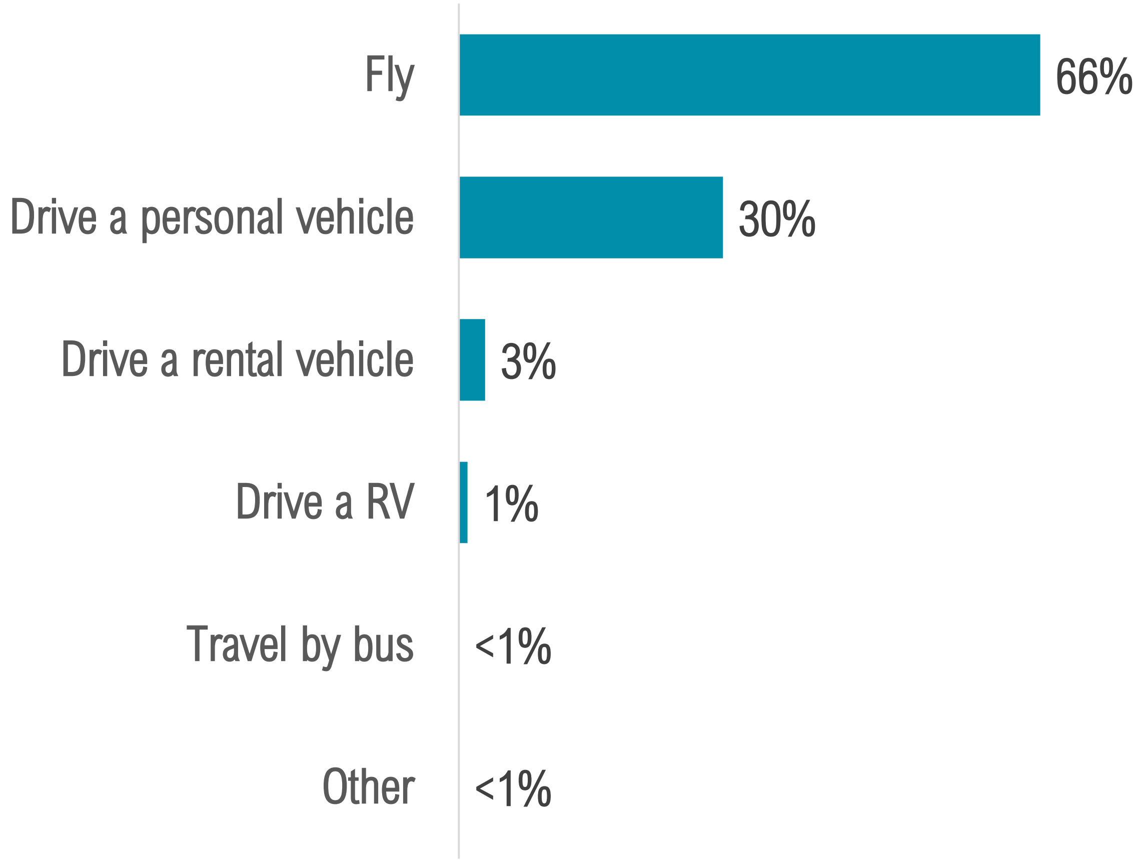
BOOKING

Over **2 in 5** visitors who stayed in paid accommodations **booked directly with a hotel/condo**.



TRANSPORTATION

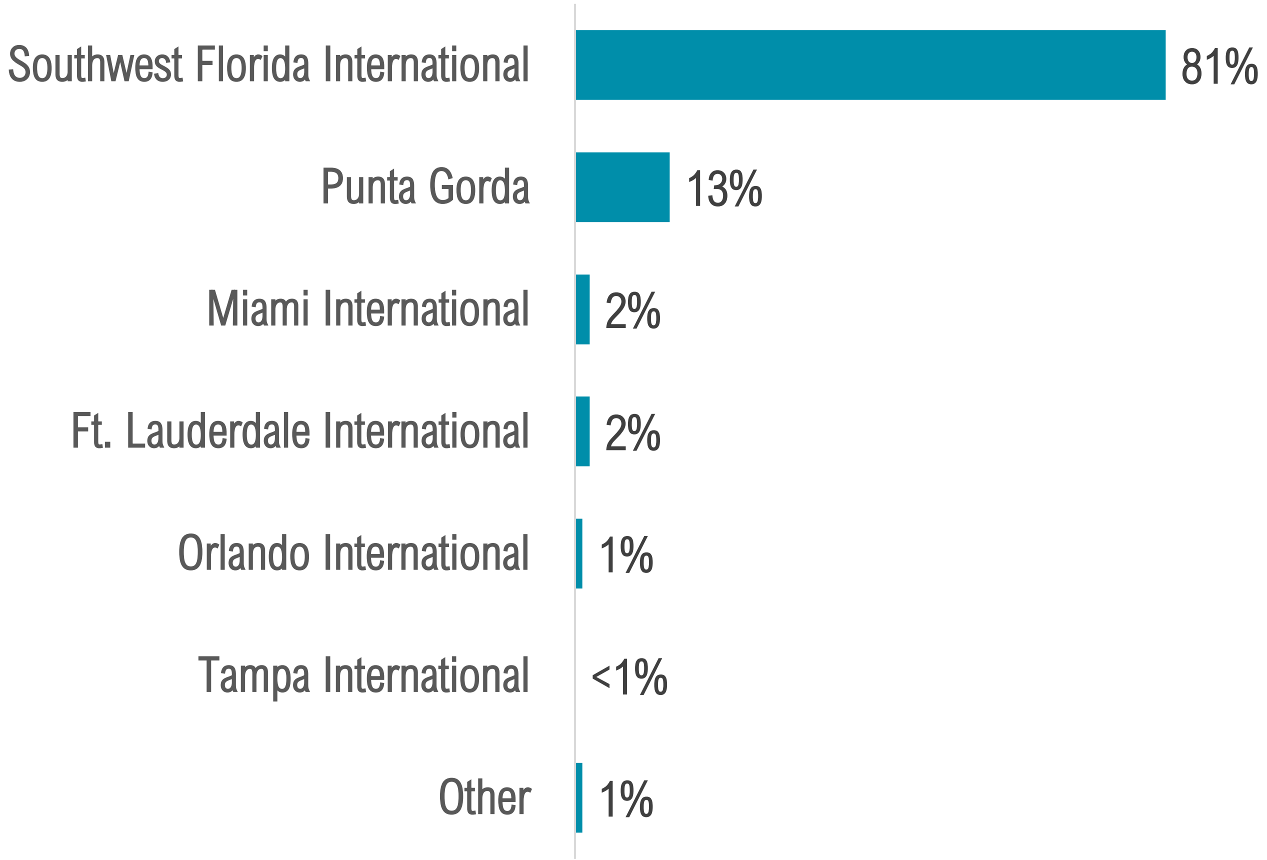
2 in 3 visitors **flew** to the Fort Myers area.



AIRPORT

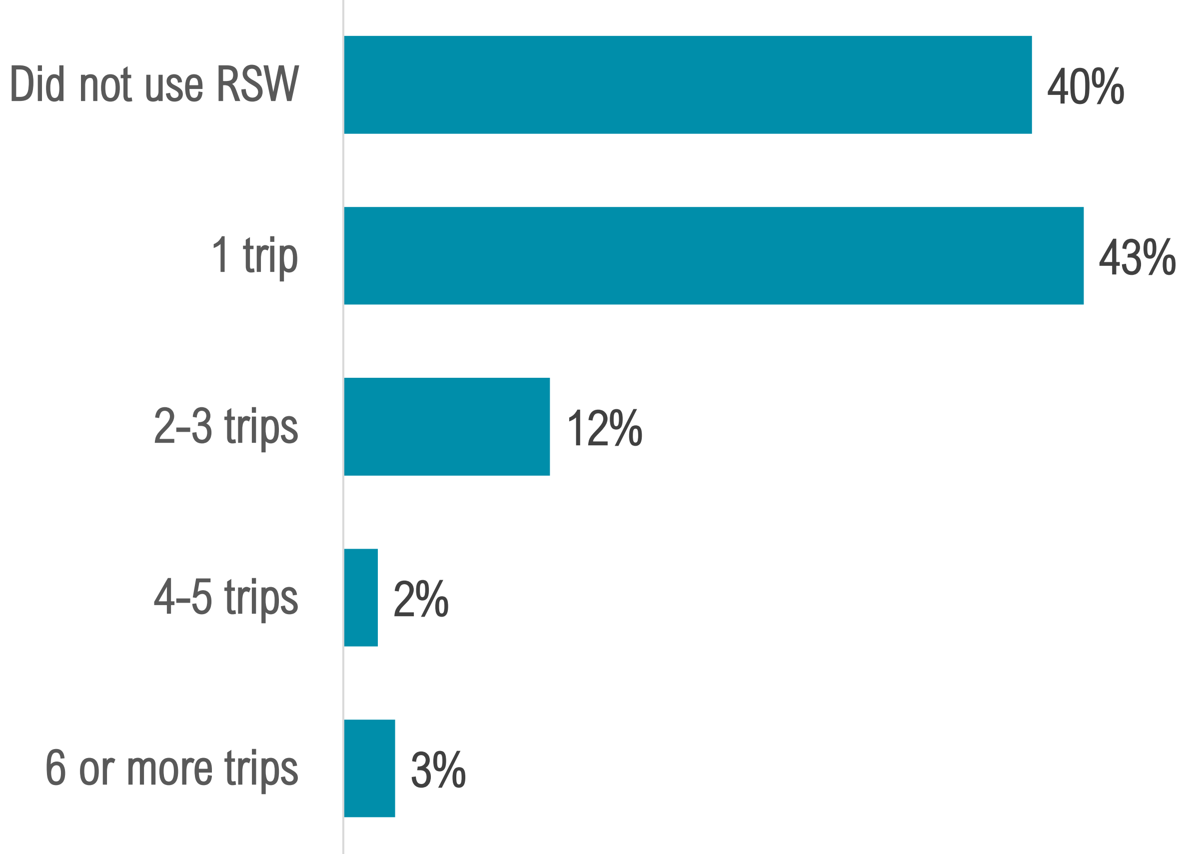
Over 4 in 5 visitors who flew to the Fort Myers area came through RSW.

BASE: 66% of visitors who flew

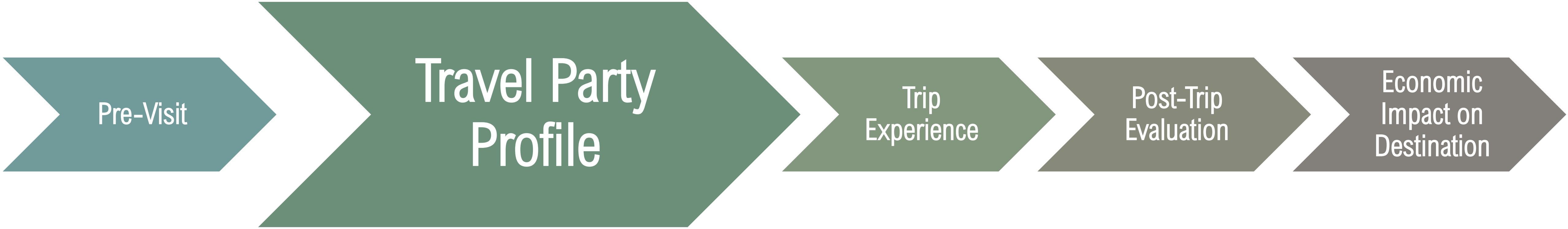


USE OF RSW IN THE PAST YEAR

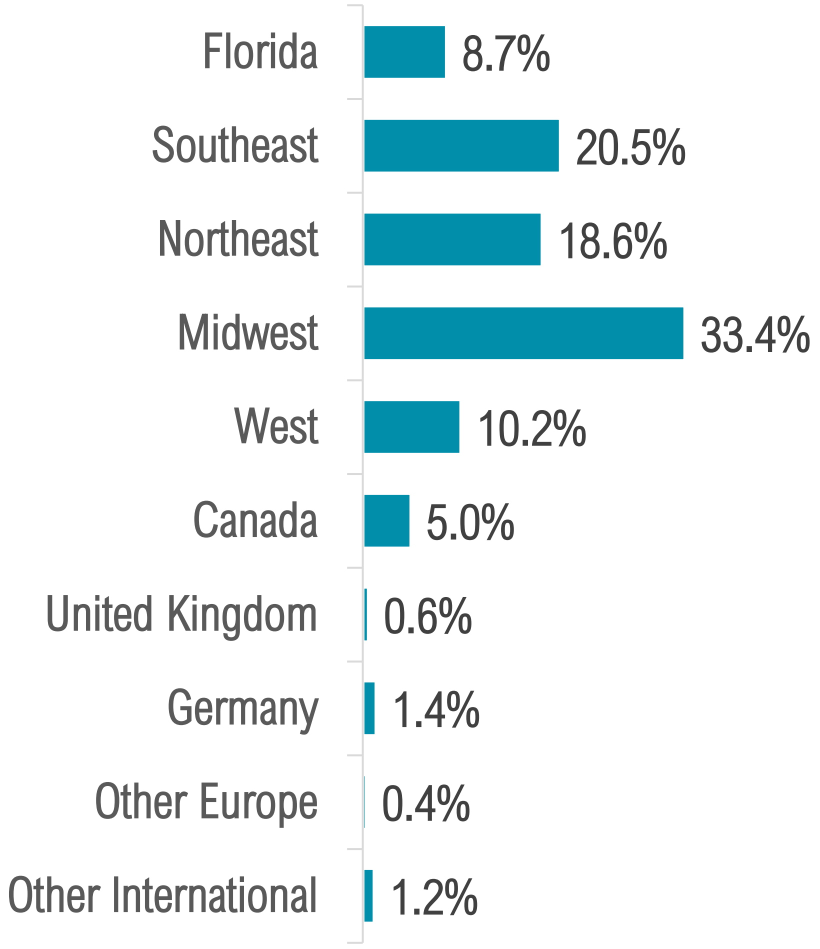
60% of visitors used RSW **at least once** in the past year.

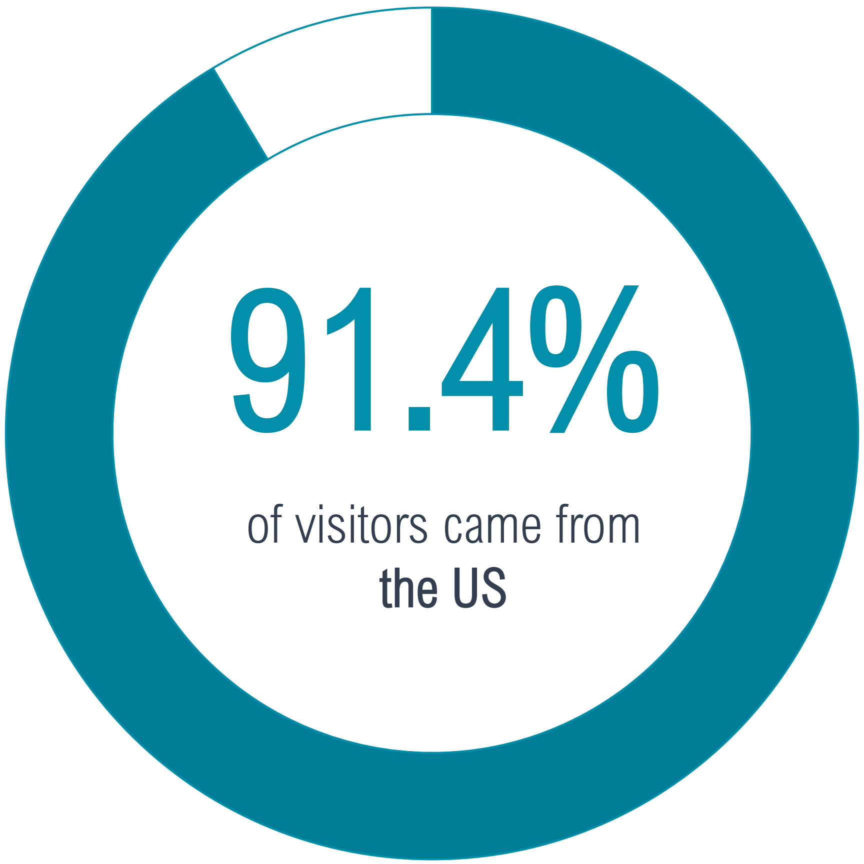


VISITOR JOURNEY: TRAVEL PARTY PROFILE



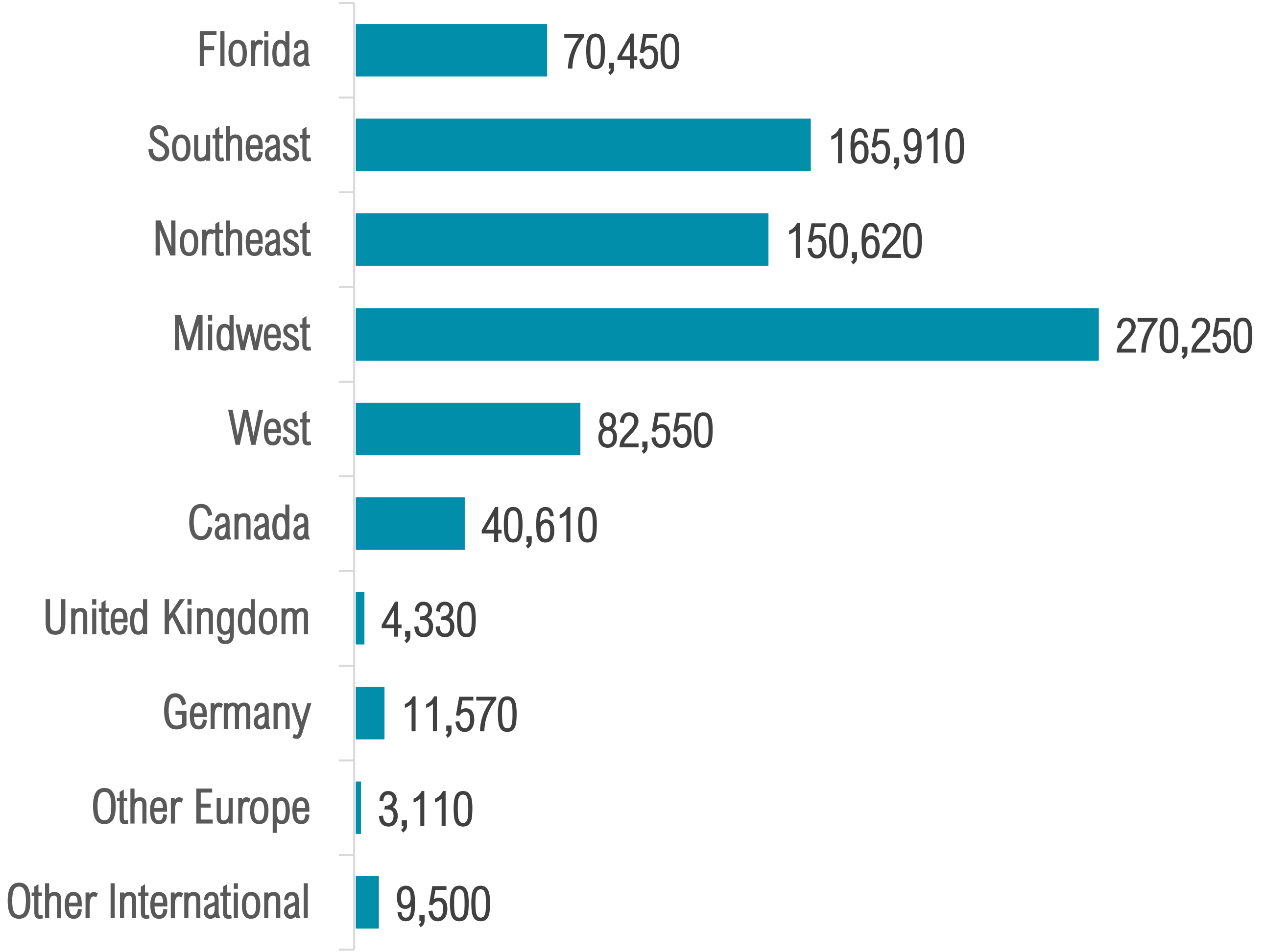
ORIGIN[1]





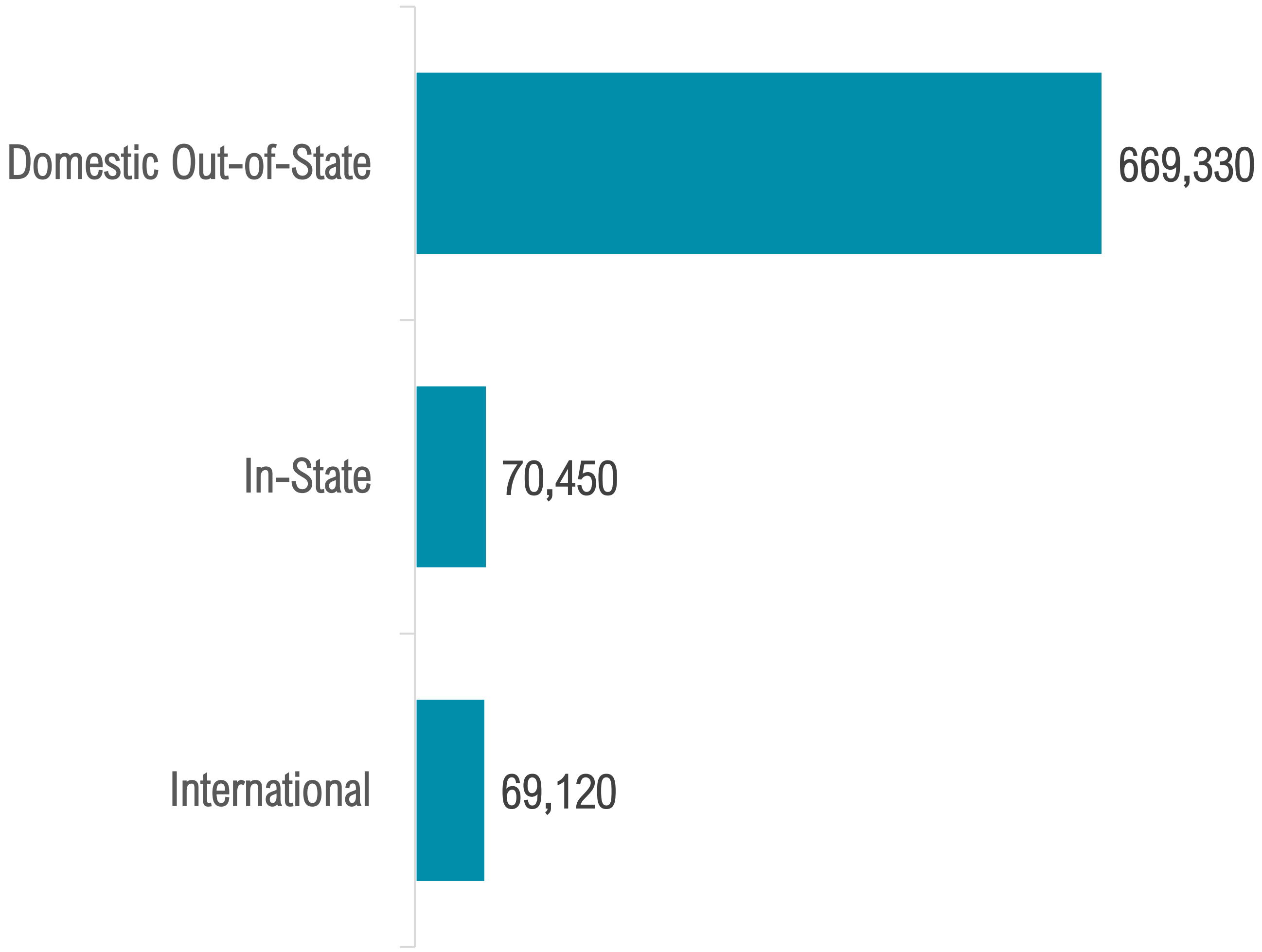
[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers. Based on data from the Visitor Tracking Study.

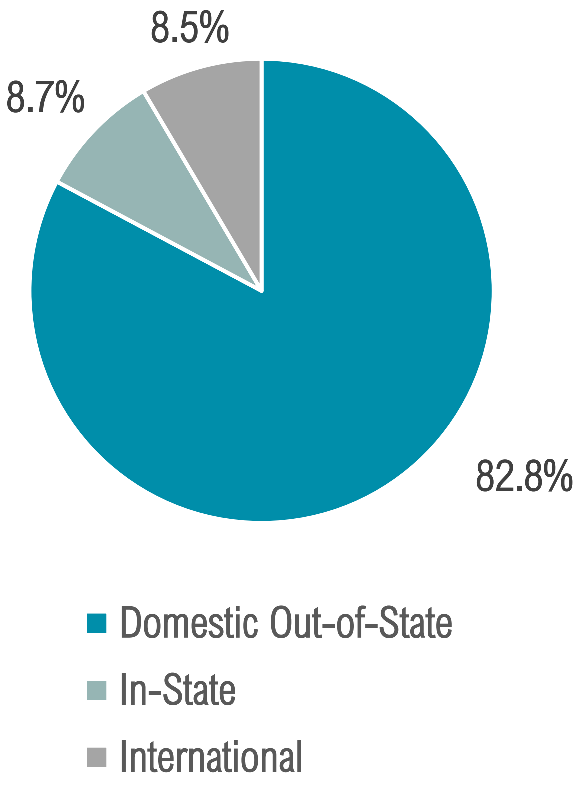
NUMBER OF VISITORS BY ORIGIN[1]



[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers. Based on data from the Visitor Tracking Study.

NUMBER OF VISITORS BY ORIGIN

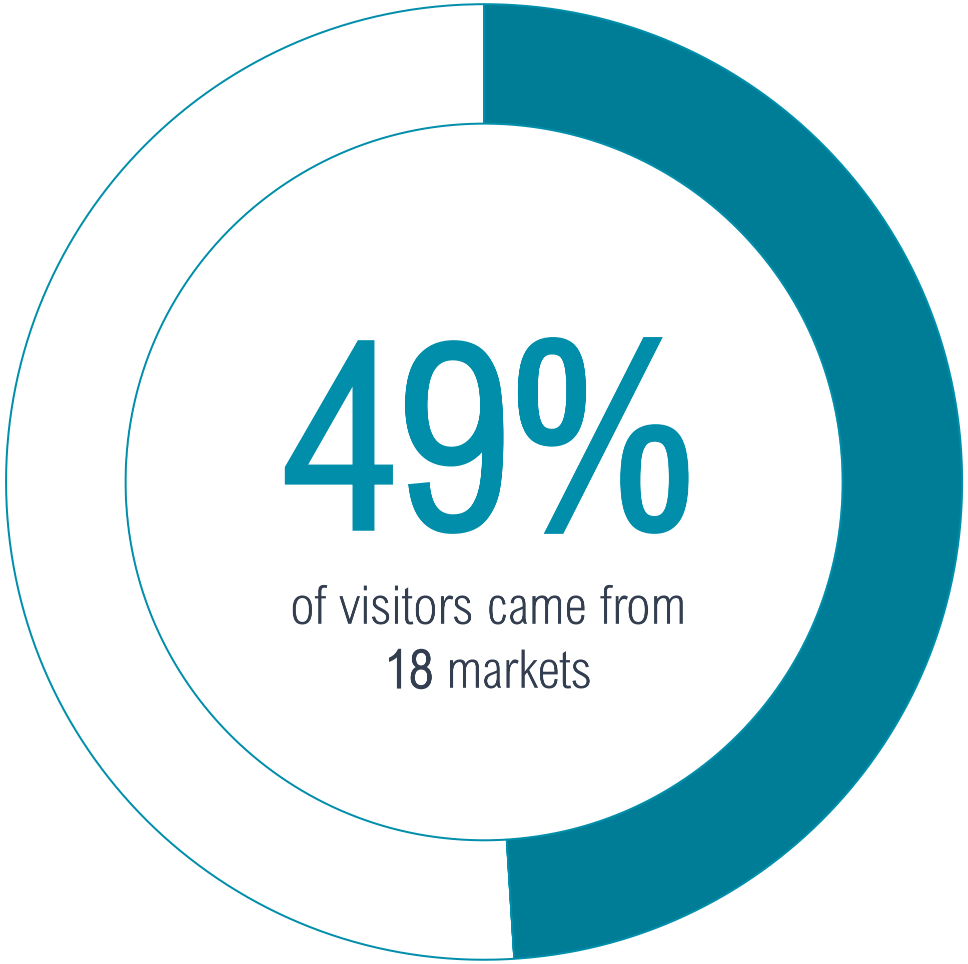




[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers.
Based on data from the Visitor Tracking Study.

ORIGIN MARKETS[1]

Market [2]	Percentage of Visitors
New York	5%
Chicago	5%
Minneapolis - Saint Paul	4%
Atlanta	4%
Indianapolis	3%
Boston	3%
Detroit	3%
Washington, DC - Hagerstown	2%
Philadelphia	2%
Naples & Surrounding Areas	2%
Denver	2%
Cincinnati	2%
Orlando - Daytona Beach – Melbourne	2%
Dallas - Fort Worth	2%
Milwaukee	2%
Miami - Fort Lauderdale	2%
Los Angeles	2%
Cleveland - Akron	2%



[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers.
[2]Based on data from the Visitor Tracking Study.

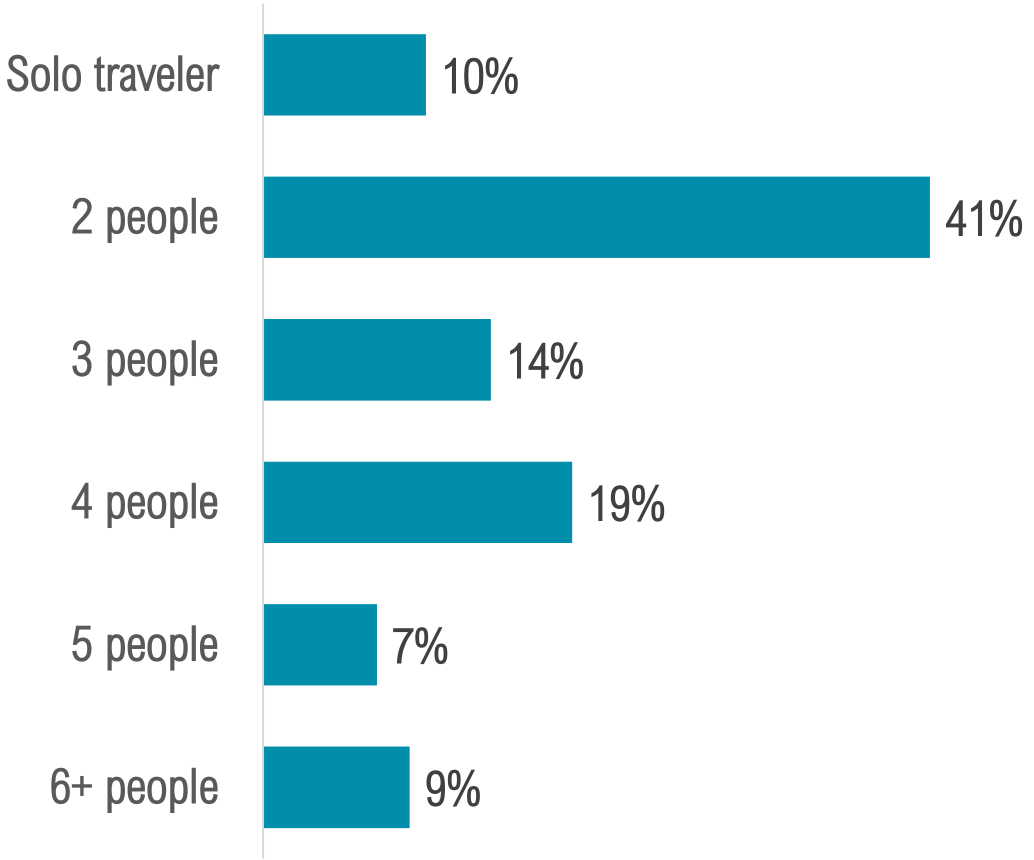
TRAVEL PARTY SIZE AND COMPOSITION

Travel Party Size

Visitors traveled in a party composed of **3.0**[1] **people**.

Travel with Children

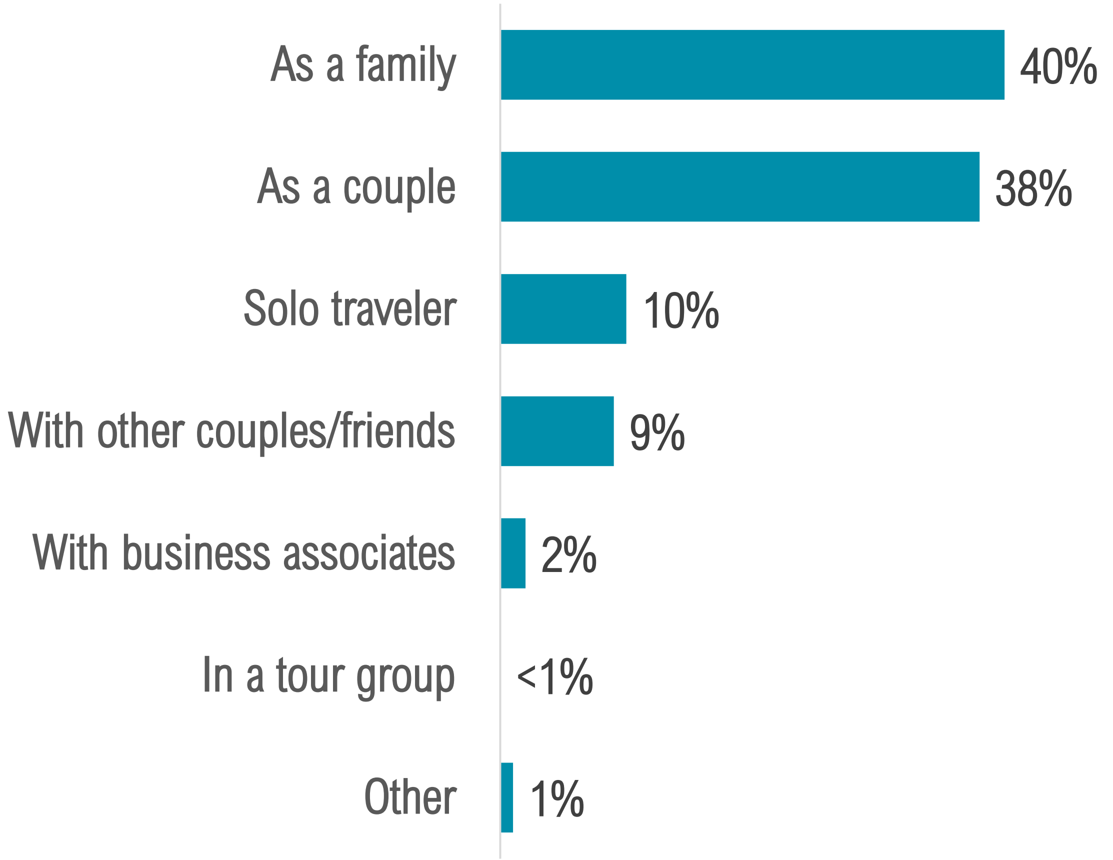
34% of visitors **traveled with children** under the age of 18.



[1]Sources: Occupancy Study and Visitor Tracking Study

TRAVEL PARTY TYPE

Nearly 4 in 5 visitors traveled either as a **family** or as a **couple**, while **10%** of visitors traveled **alone.**



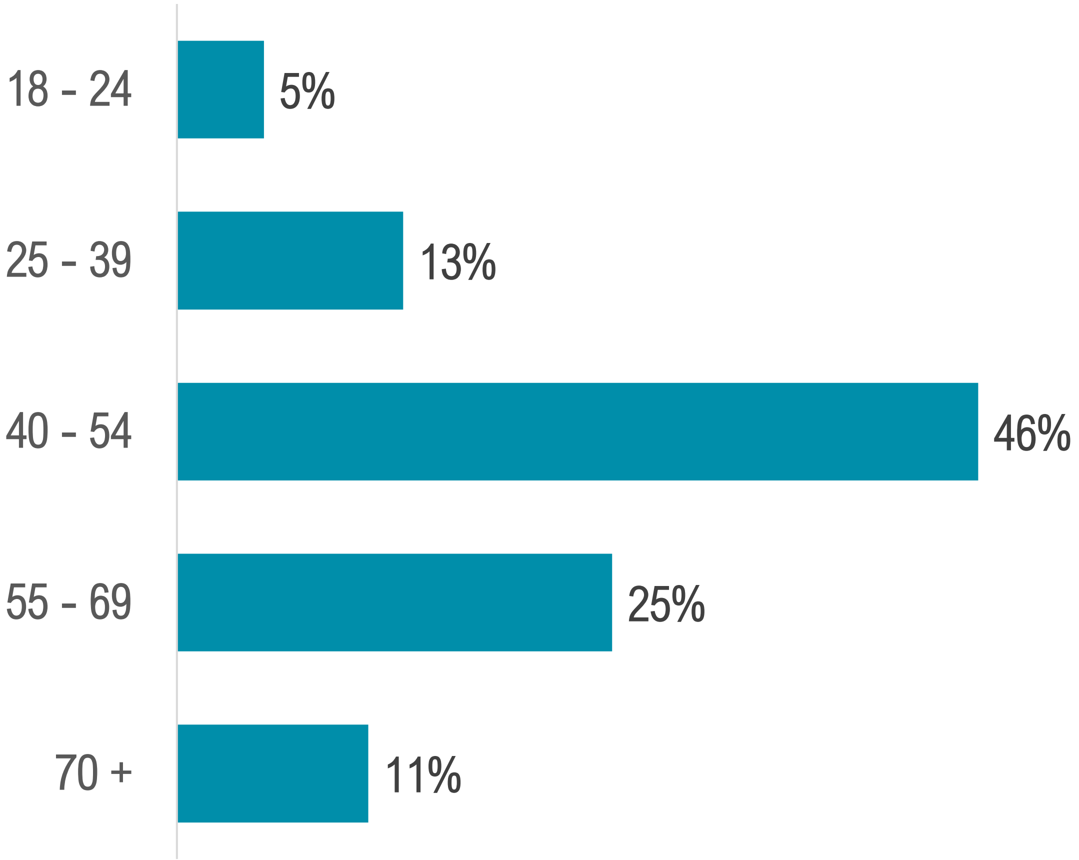
AGE

Average Age

The average age of Apr – Jun visitors was 50 years old.

Median Age

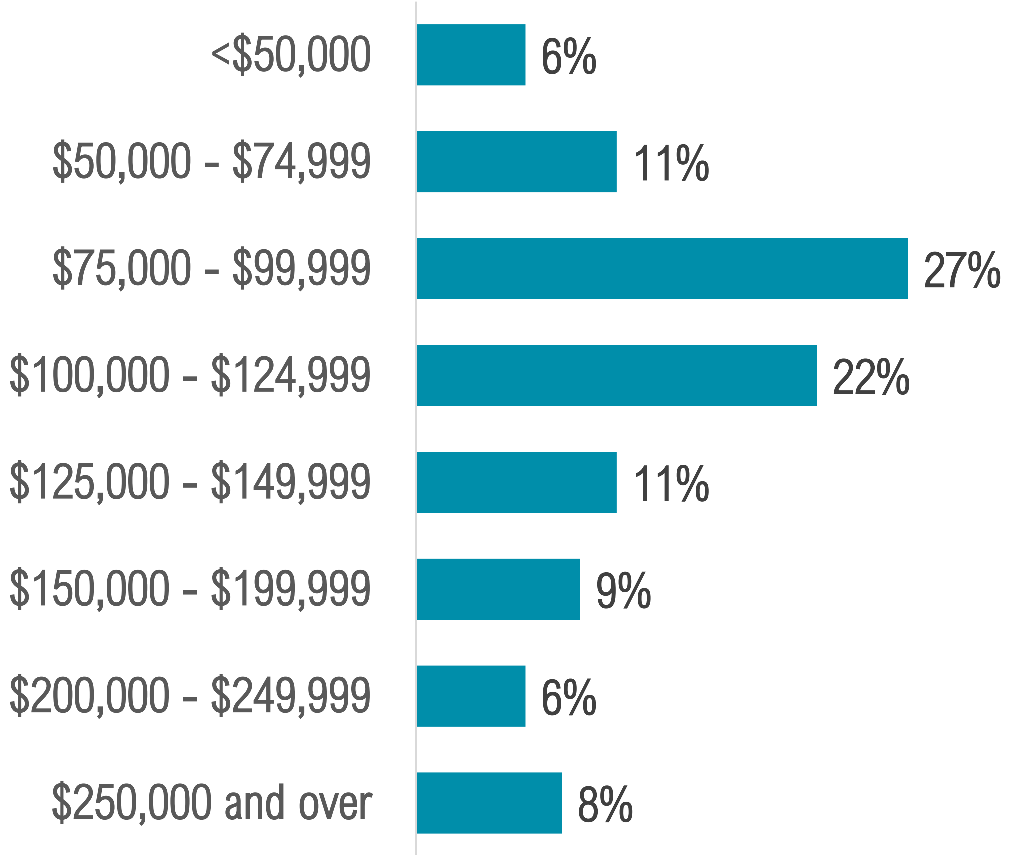
The median age of Apr - Jun visitors was 50 years old.



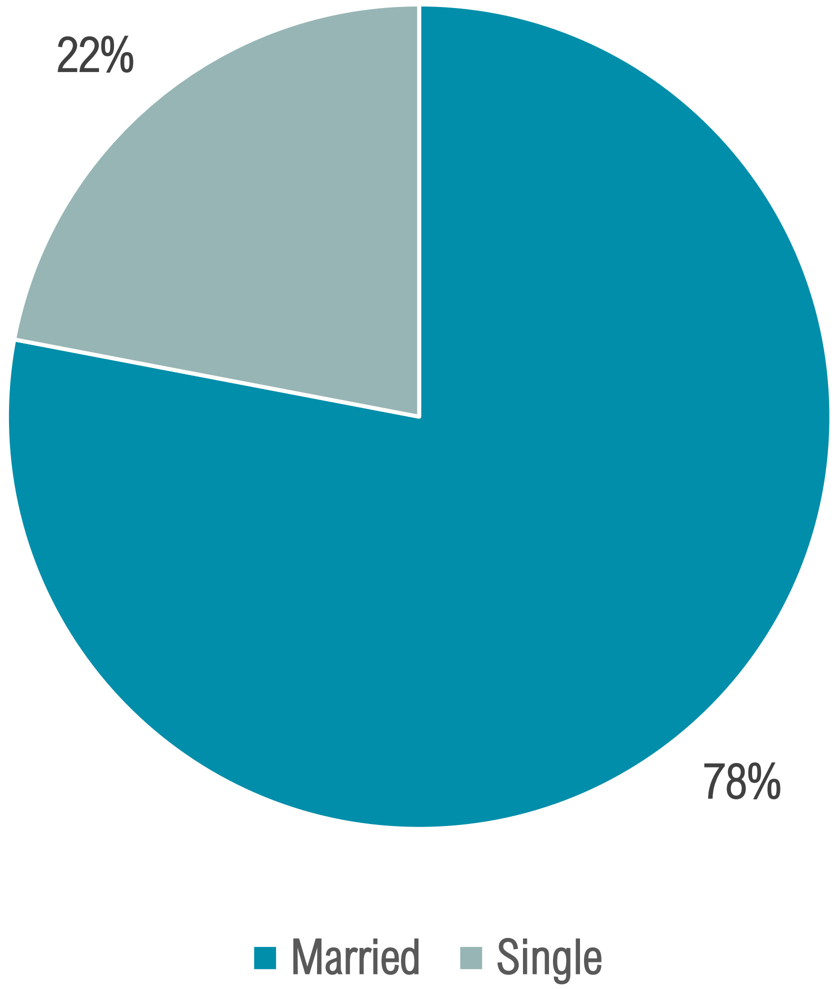
HOUSEHOLD INCOME

Median Household Income
Apr - Jun visitors had a median household income of **$106,800.**

14% of visitors had a household income in excess of **$200,000.**



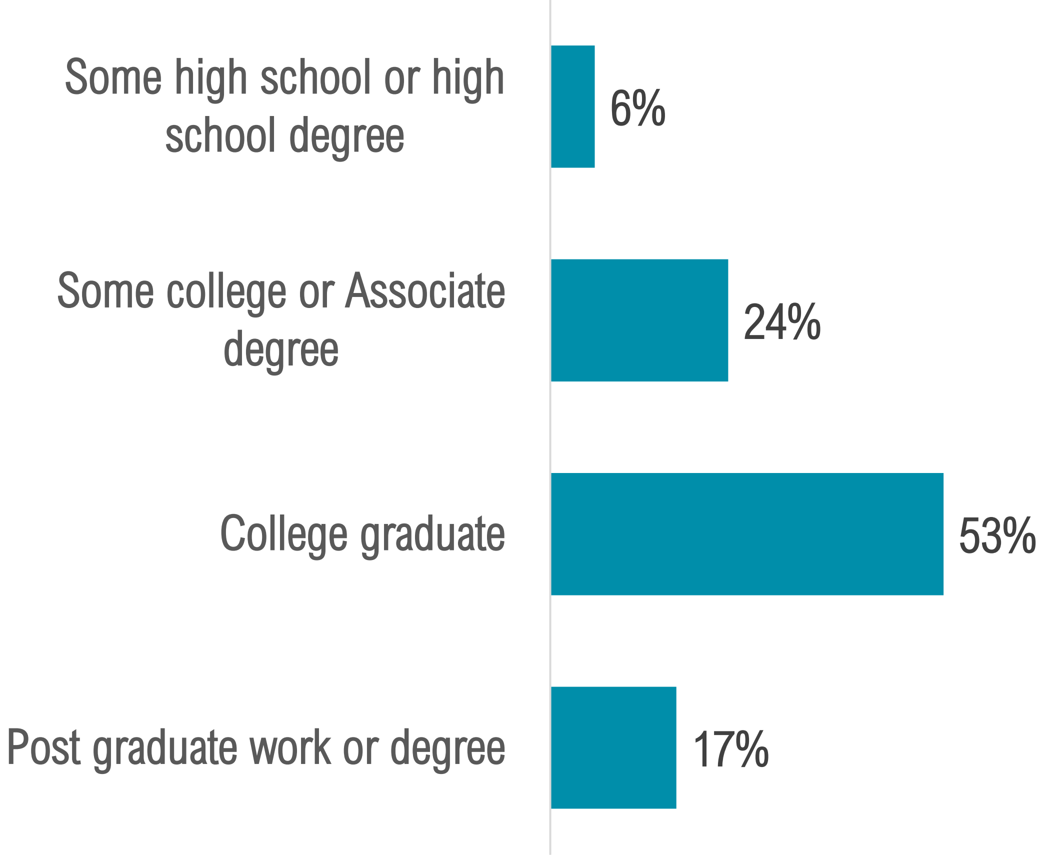
MARITAL STATUS



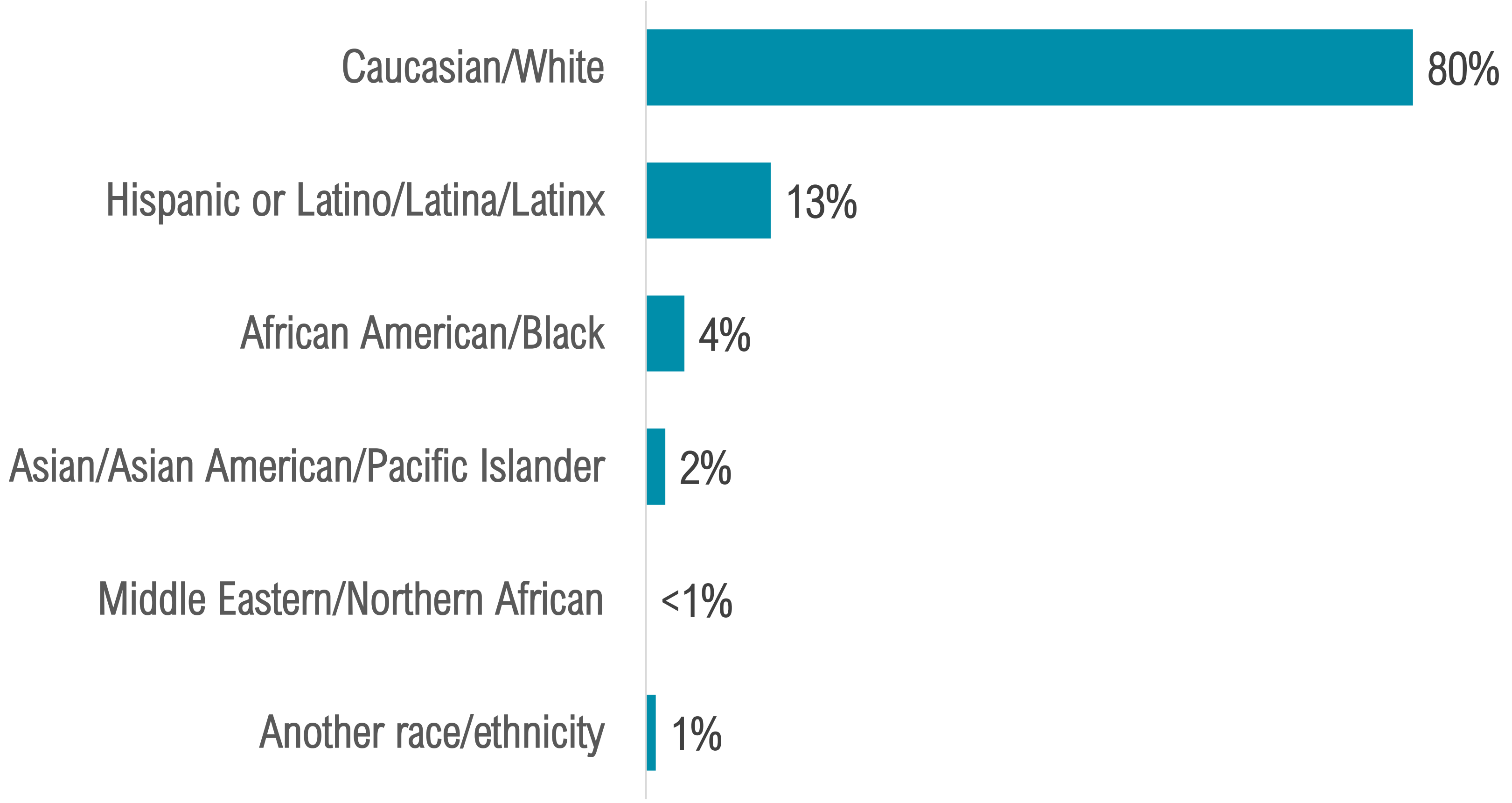
EDUCATION

Education Level

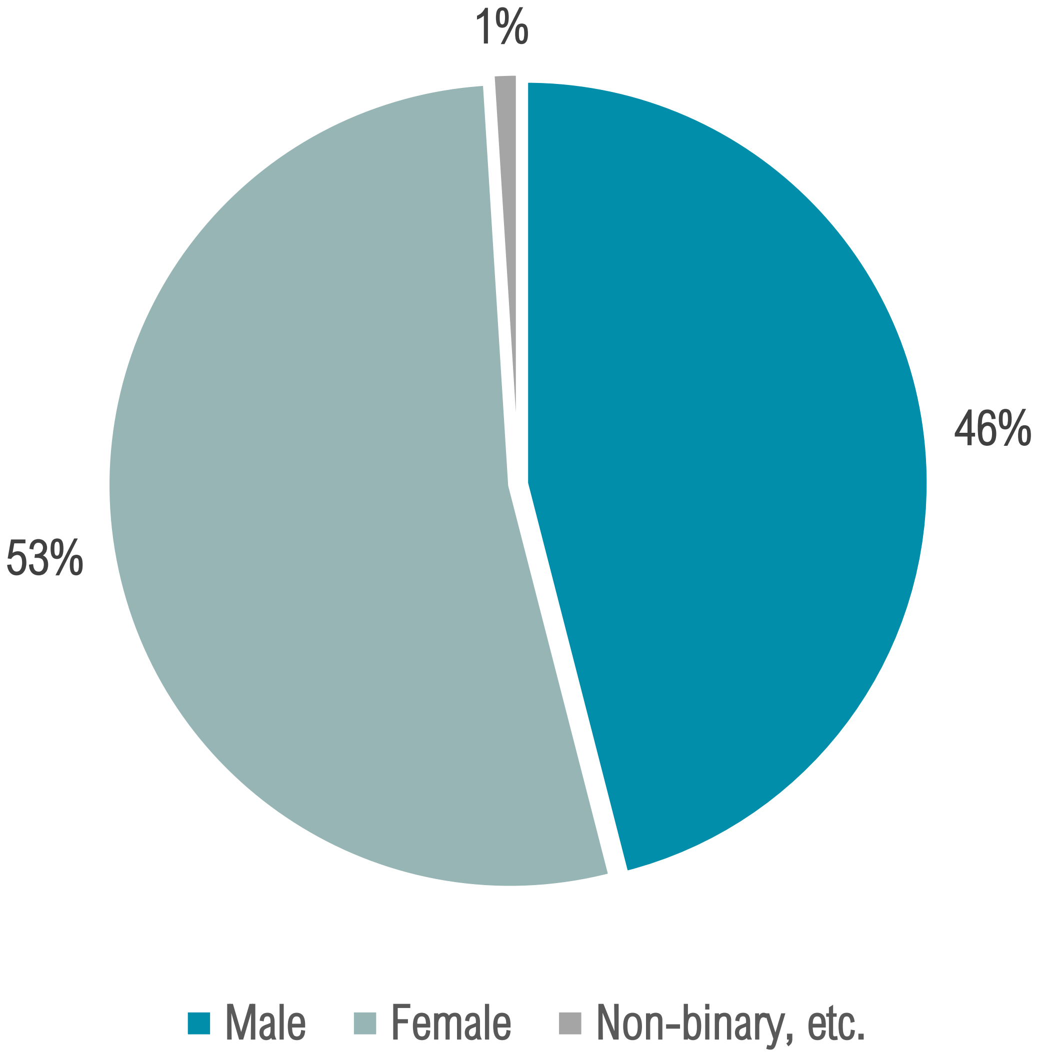
7 in 10 of Apr - Jun visitors had achieved a bachelor's degree or higher.



RACE/ETHNICITY



GENDER[1]



[1]Gender of person interviewed.

VISITOR JOURNEY: TRIP EXPERIENCE

Pre-Visit

Travel Party Profile

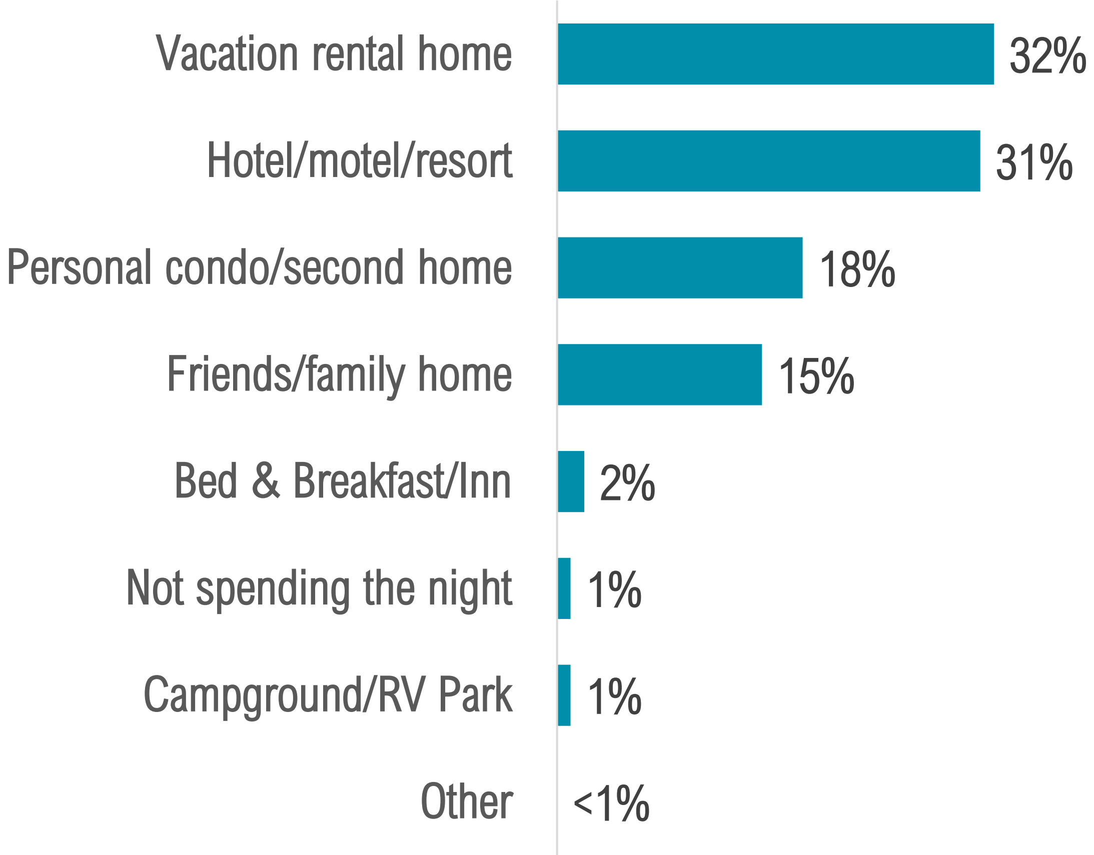
Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

ACCOMMODATIONS

2 in 3 visitors stayed in **paid accommodations**



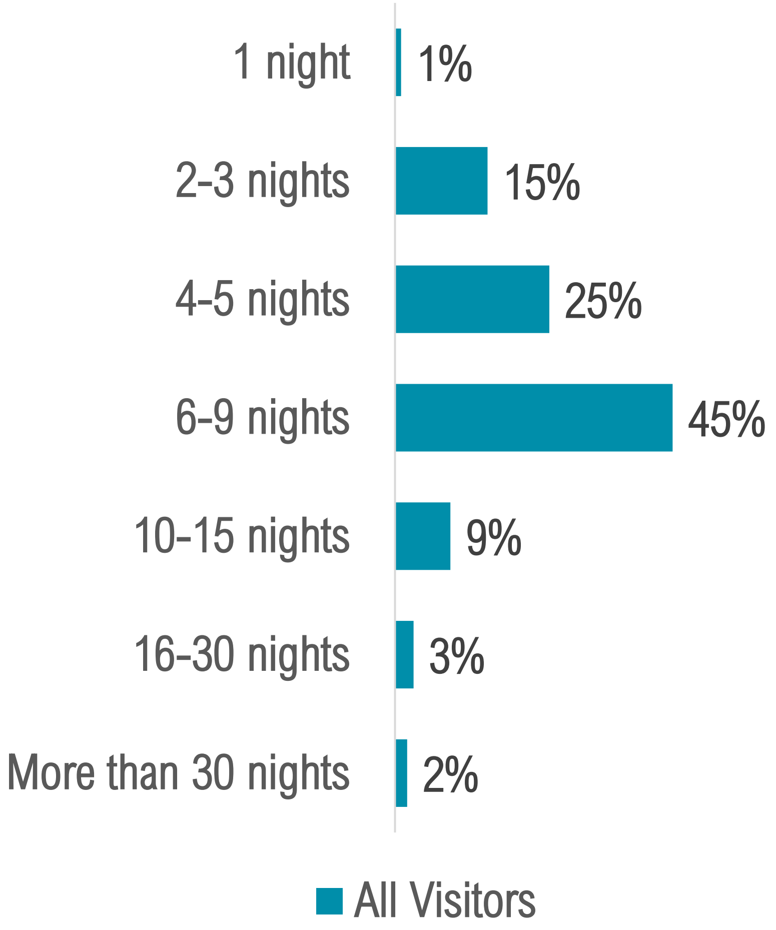
NIGHTS STAYED

All Visitors

Visitors spent an average of 6.2[1] nights in the Fort Myers area.

Visitors Staying in Paid Accommodations

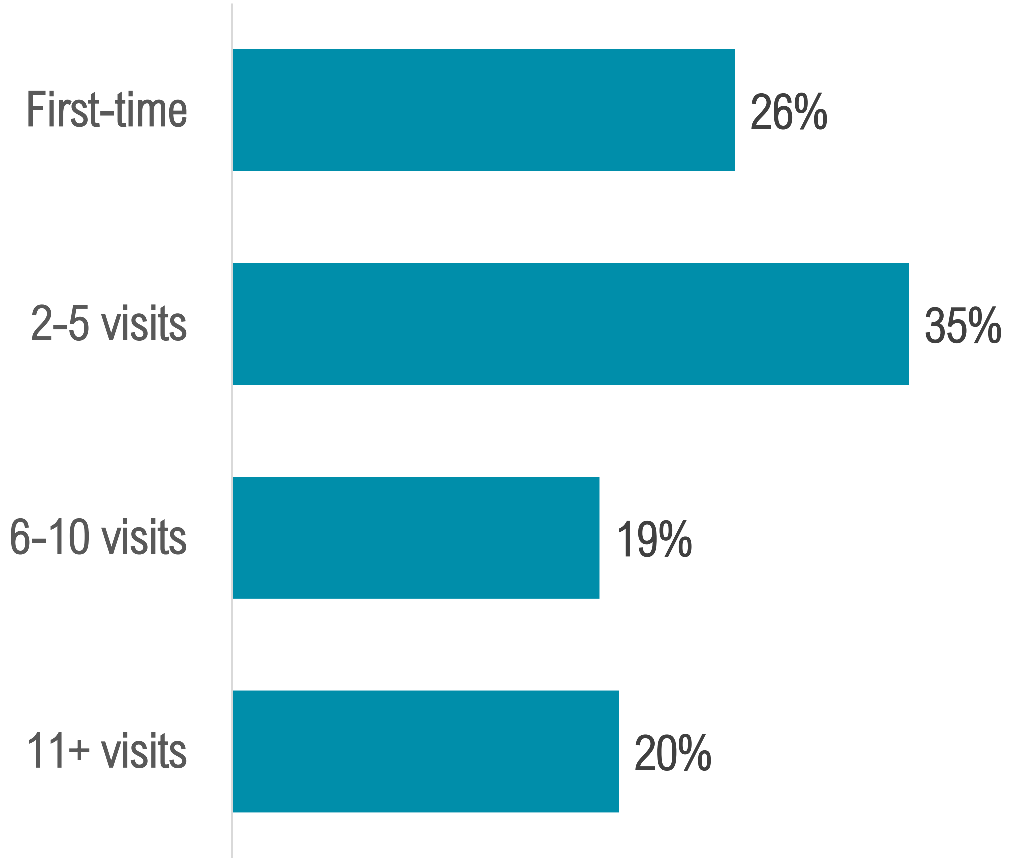
Visitors staying in paid accommodations spent an average of 5.7[2] nights in the Fort Myers area.



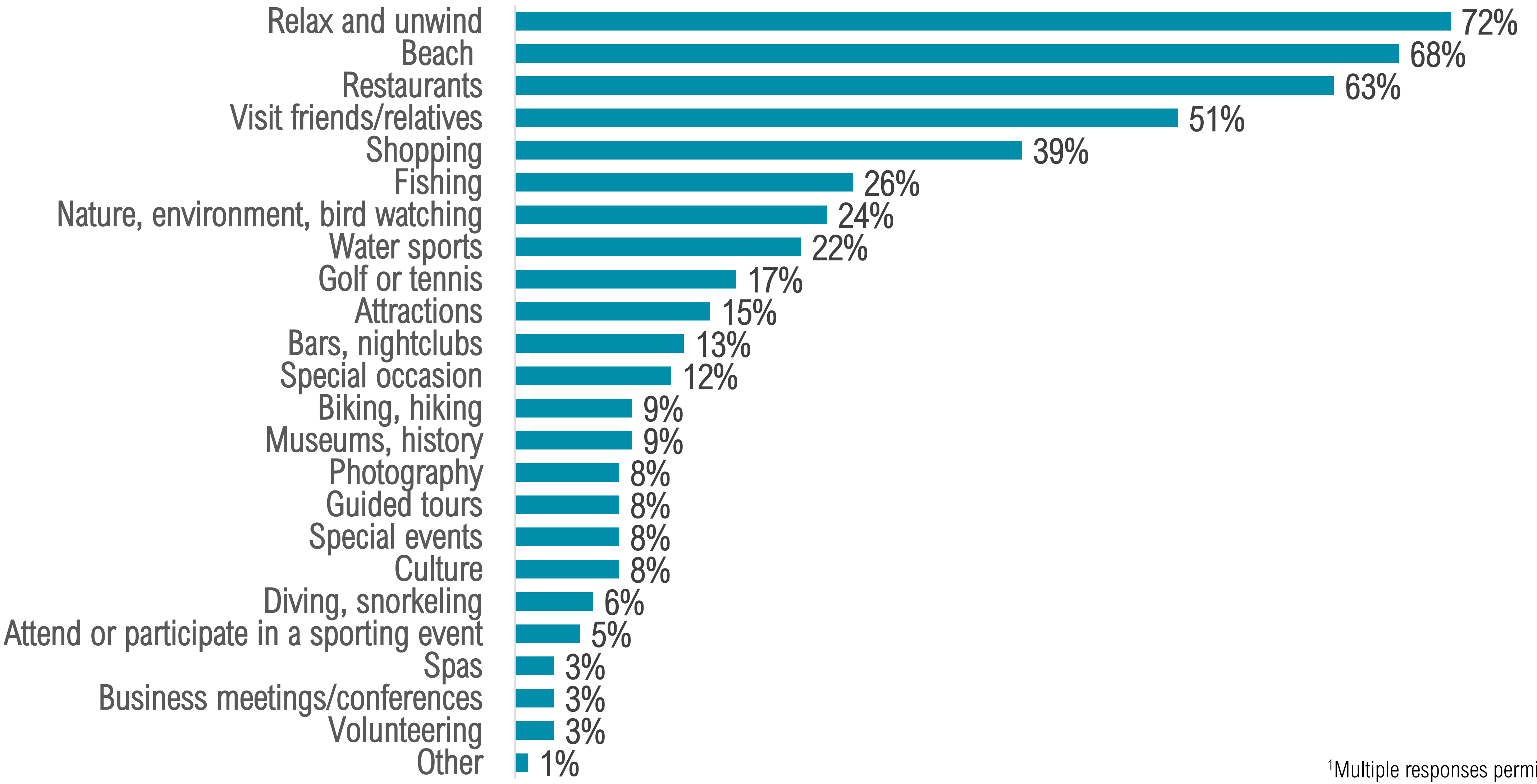
[1]Sources: Occupancy Study and Visitor Tracking Study
[2]Source: Occupancy Study

FIRST TIME AND EXPERIENCED VISITORS

Over 1 in 4 visitors were visiting for the first time, while 1 in 5 were highly loyal visitors, having visited more than 10 times.

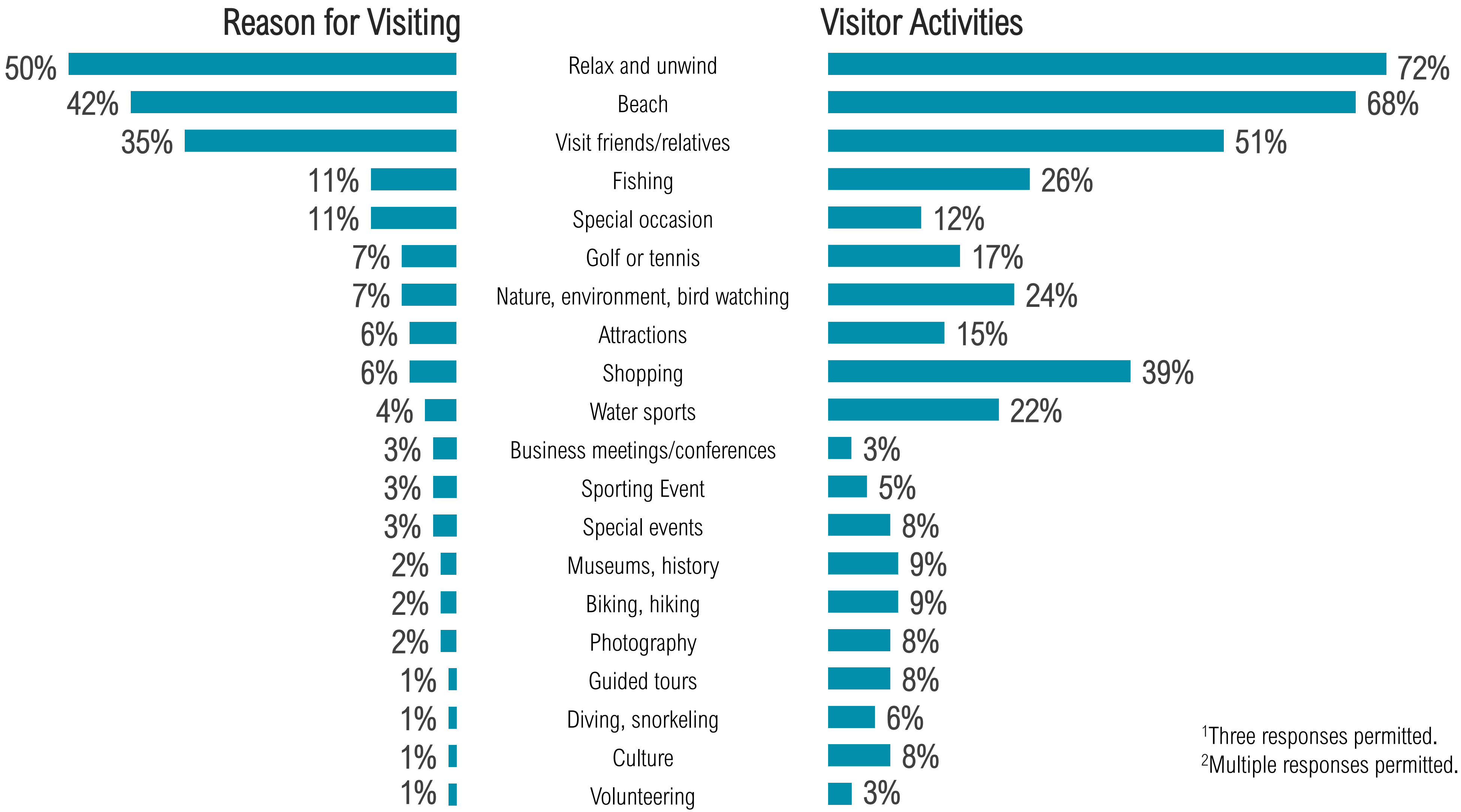


VISITOR ACTIVITIES[1]



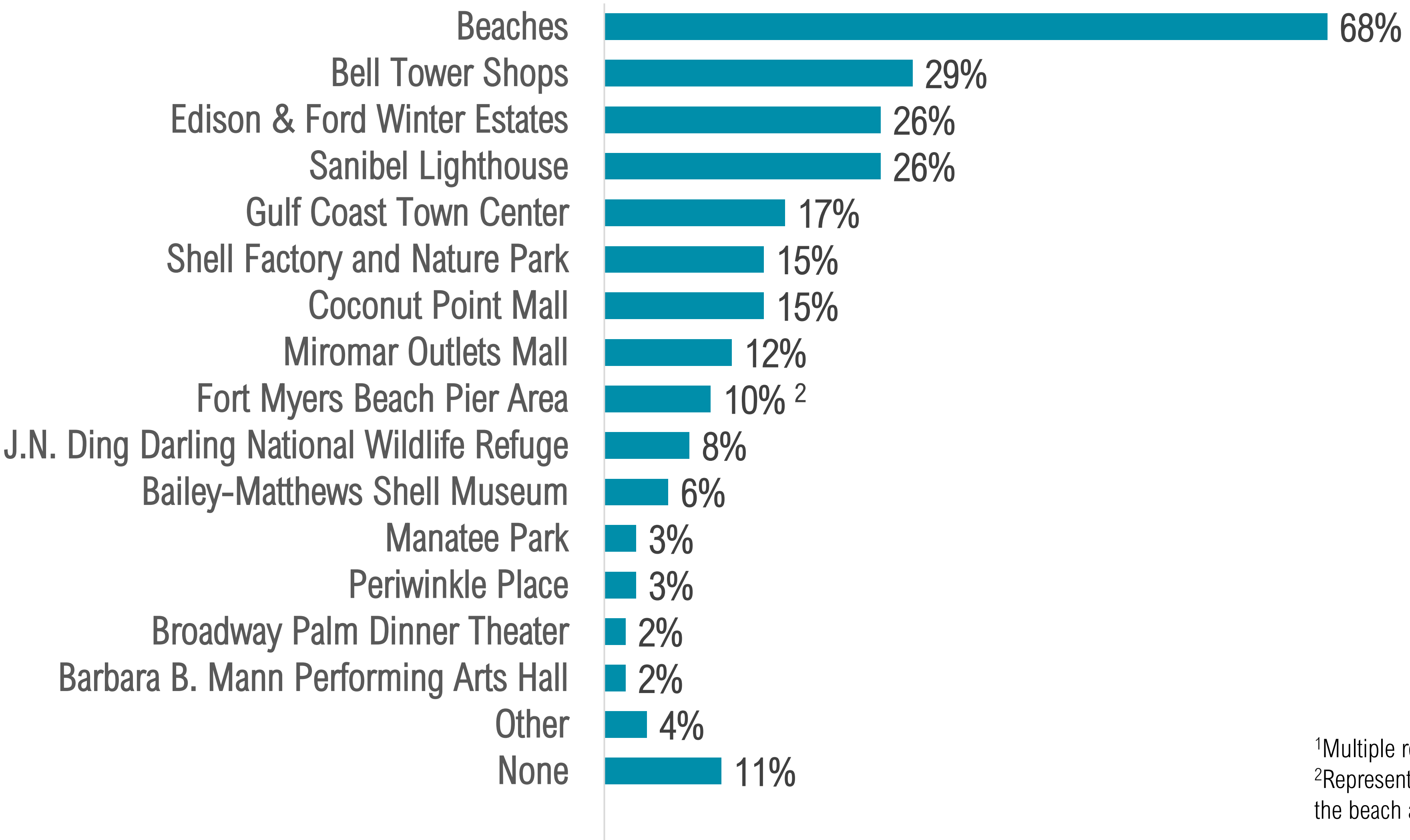
[1]Multiple responses permitted.

REASON FOR VISITING[1] VS. VISITOR ACTIVITIES[2]



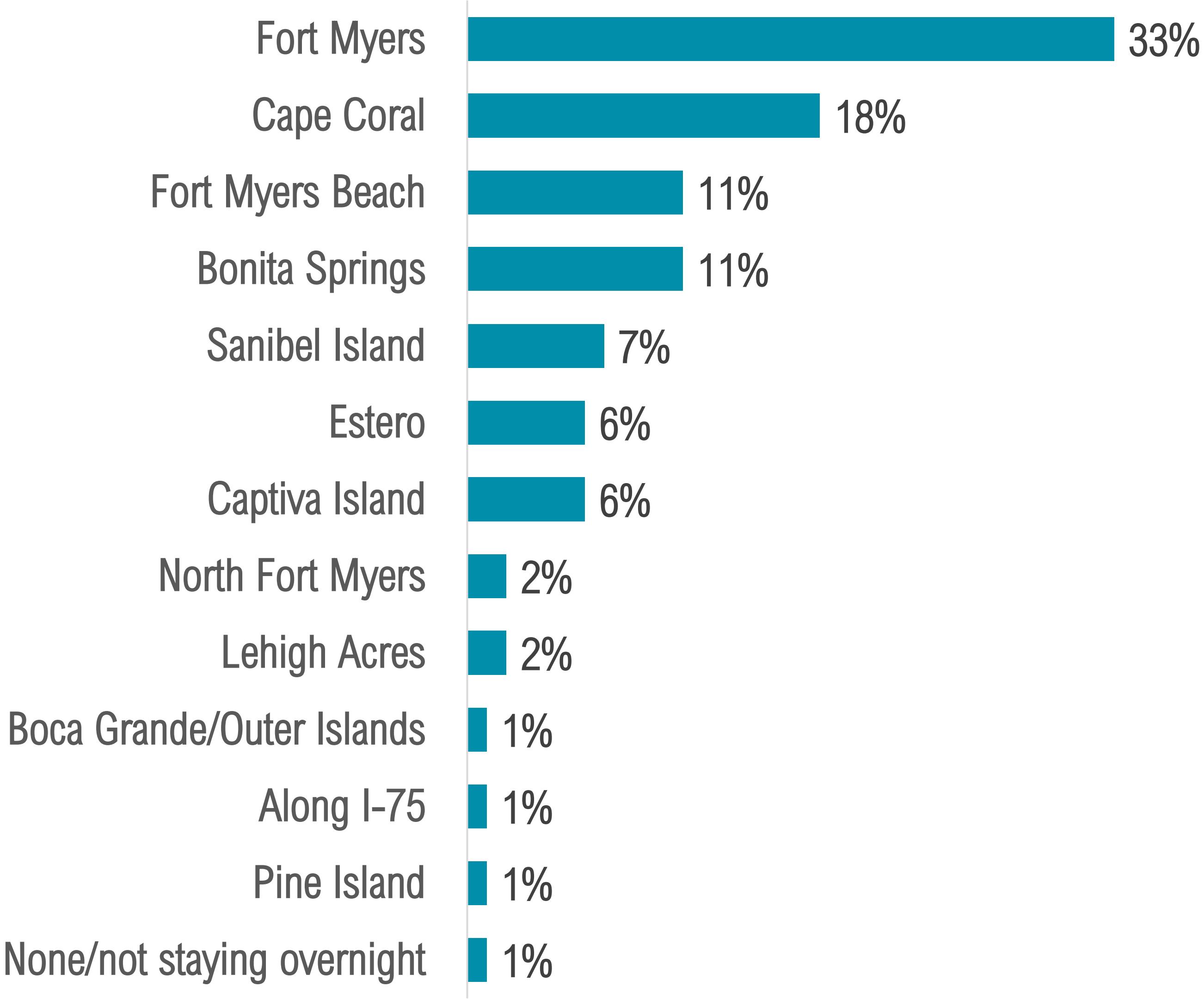
[1]Three responses permitted.
[2]Multiple responses permitted.

ATTRACTIONS VISITED[1]



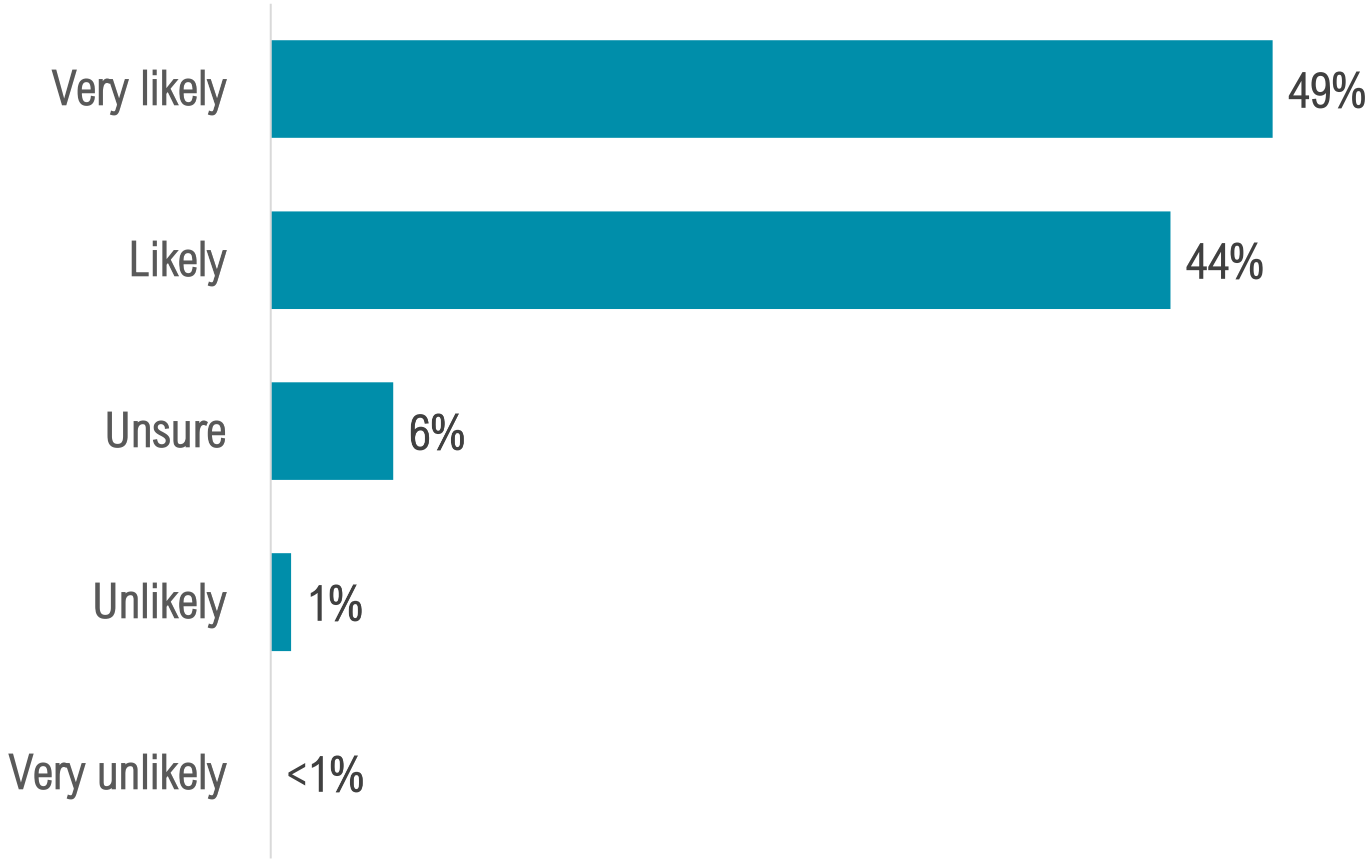
[1]Multiple responses permitted.
[2]Represents visitors who spent time on the beach area near where the pier was.

COMMUNITY STAYED

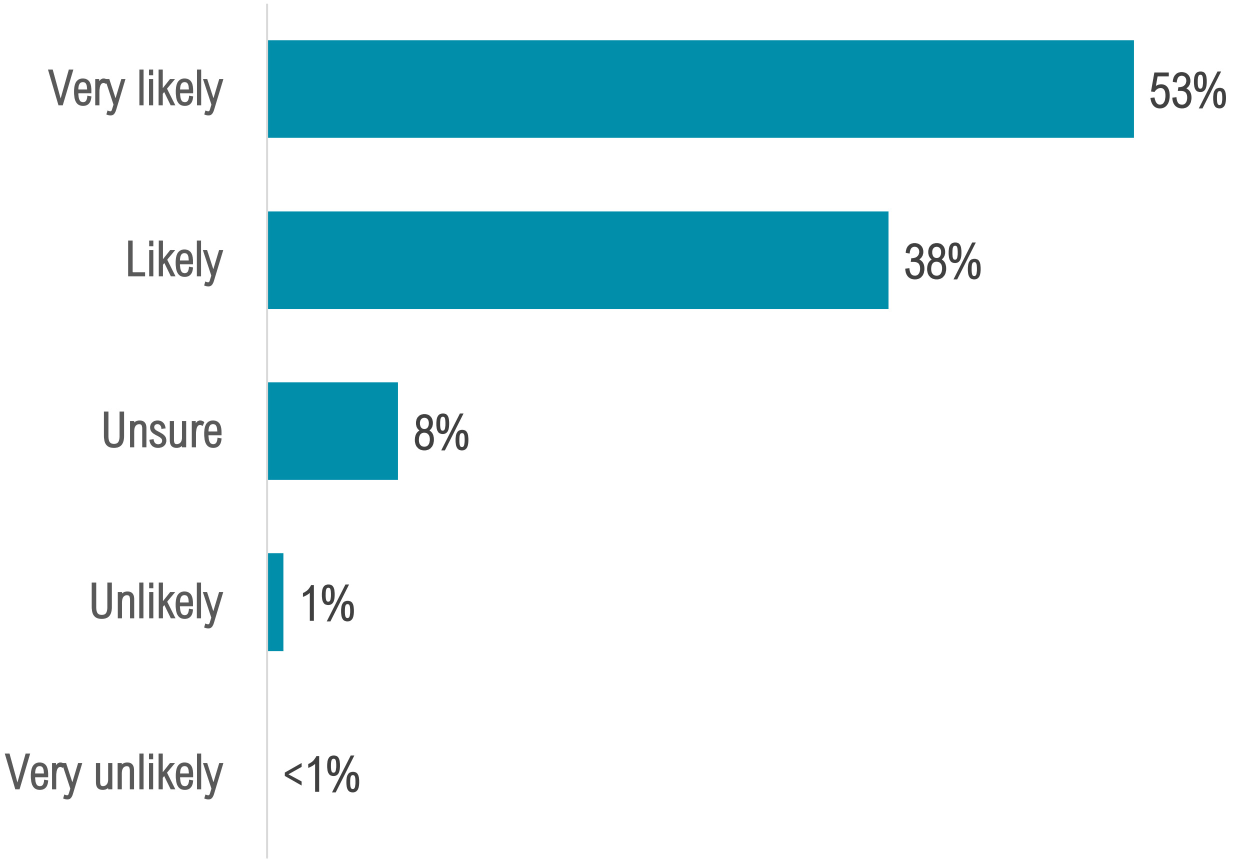


VISITOR JOURNEY: POST-TRIP EVALUATION

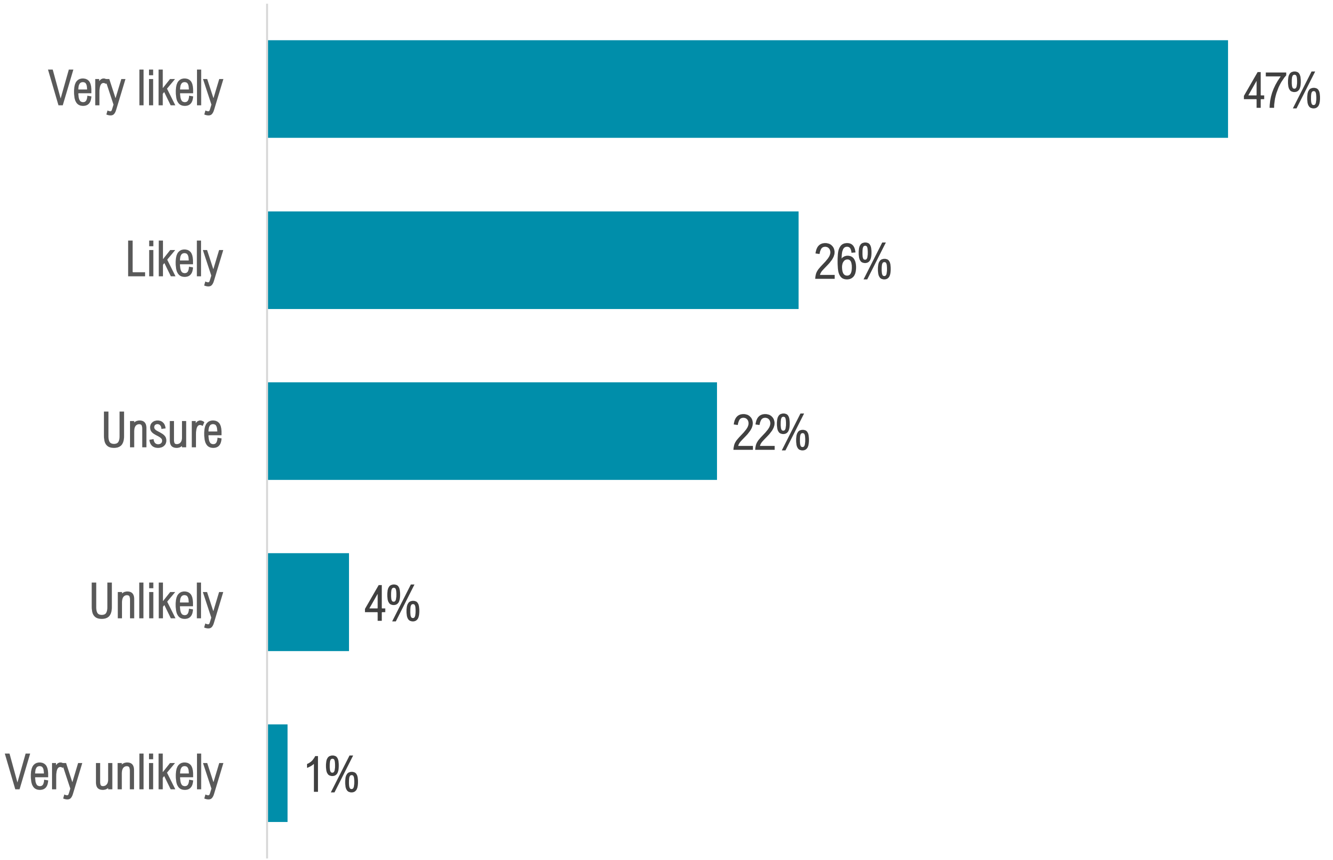
LIKELIHOOD OF RECOMMENDING THE AREA



LIKELIHOOD OF RETURNING TO THE AREA



LIKELIHOOD OF RETURNING NEXT YEAR



CROSSTABULATIONS: LIKELIHOOD OF RECOMMENDING[1]

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2023	2024	2023	2024	2023	2024	2023	2024
Very Likely	43%	52%	51%	49%	46%	48%	64%	58%
Likely	44%	37%	40%	45%	44%	45%	28%	39%
Unsure/don't know	11%	9%	7%	5%	9%	6%	5%	2%
Unlikely	1%	2%	1%	1%	<1%	1%	3%	1%
Very Unlikely	1%	<1%	1%	<1%	1%	<1%	<1%	<1%

CROSSTABULATIONS: LIKELIHOOD OF RETURNING[1]

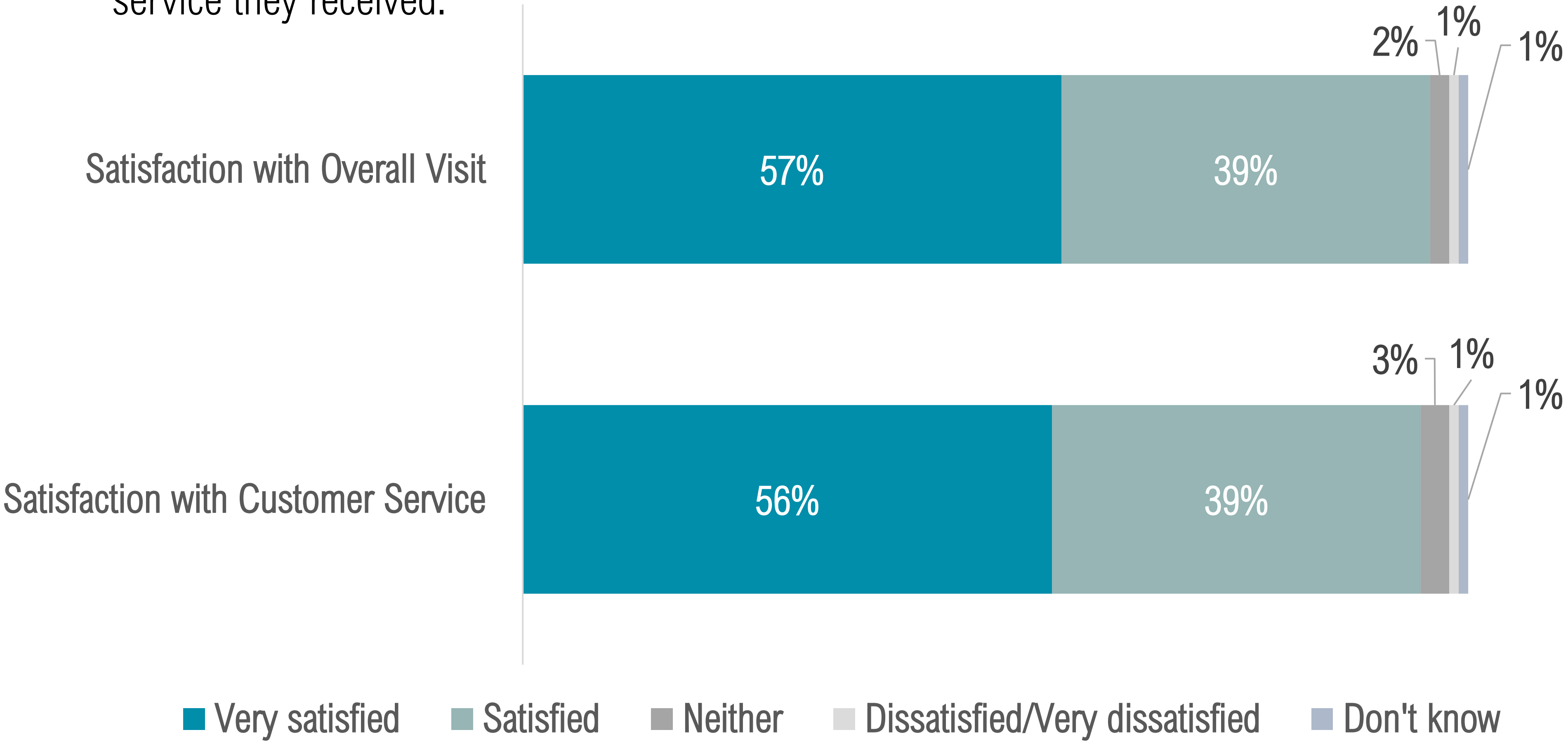
	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2023	2024	2023	2024	2023	2024	2023	2024
Very Likely	41%	53%	60%	54%	52%	52%	66%	64%
Likely	37%	30%	31%	39%	35%	39%	21%	31%
Unsure/don't know	17%	14%	8%	6%	11%	8%	8%	2%
Unlikely	4%	3%	<1%	1%	1%	1%	3%	2%
Very Unlikely	1%	<1%	1%	<1%	1%	<1%	2%	1%

CROSSTABULATIONS: LIKELIHOOD OF RETURNING NEXT YEAR[1]

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int’l Visitors	
	2023	2024	2023	2024	2023	2024	2023	2024
Very Likely	28%	42%	53%	54%	44%	50%	64%	66%
Likely	36%	26%	27%	29%	32%	30%	16%	19%
Unsure/don’t know	28%	18%	17%	13%	20%	14%	17%	12%
Unlikely	8%	13%	2%	3%	4%	5%	2%	3%
Very Unlikely	<1%	1%	1%	1%	<1%	1%	1%	<1%

SATISFACTION

- Compared to 2023, visitors were **more** likely to be **very satisfied** with their overall visit or the customer service they received.



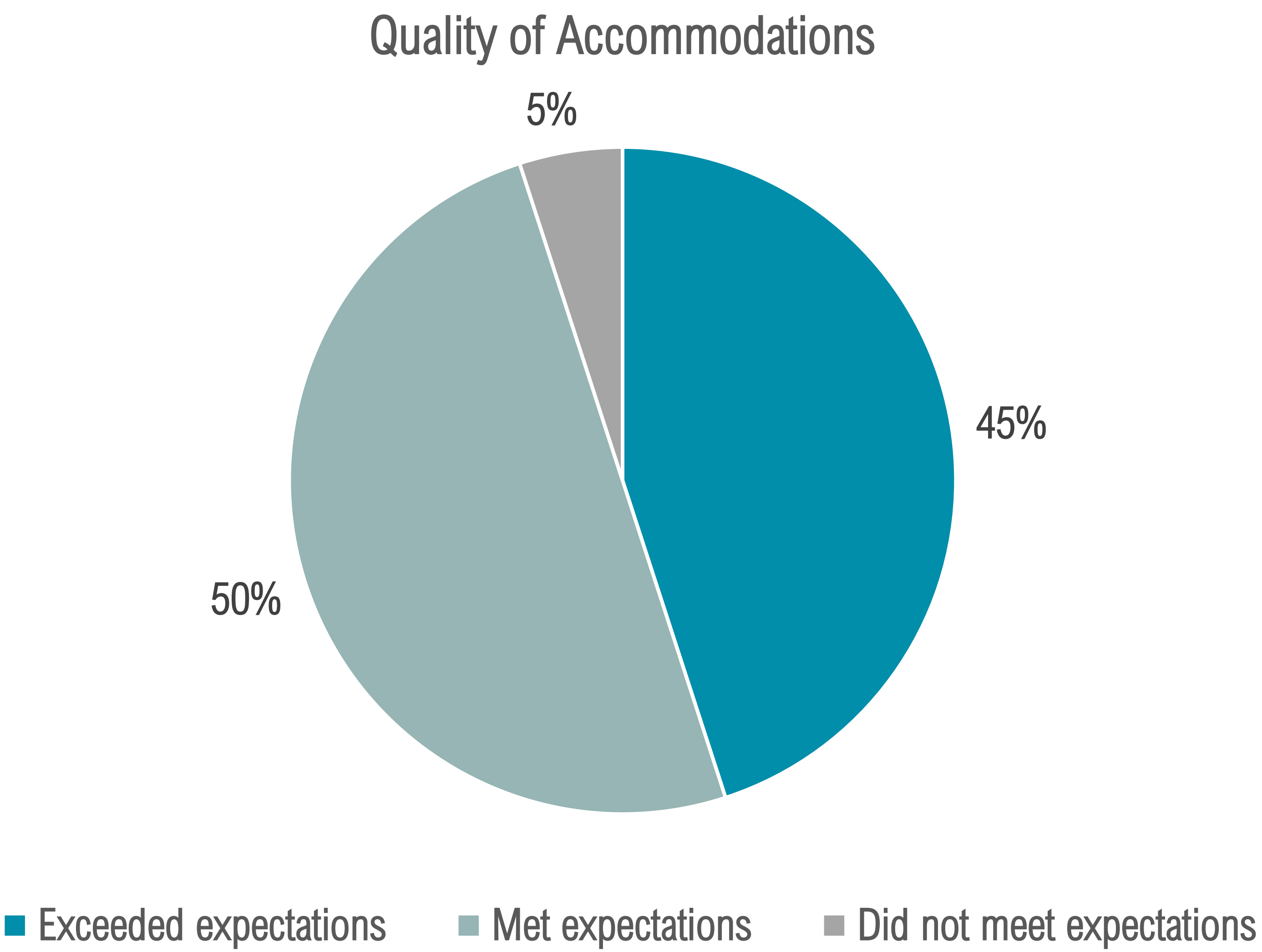
CROSSTABULATIONS: SATISFACTION WITH OVERALL VISIT

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2023	2024	2023	2024	2023	2024	2023	2024
Very Satisfied	52%	62%	58%	56%	54%	55%	67%	76%
Satisfied	41%	35%	37%	41%	40%	42%	28%	23%
Unsure/don't know	5%	2%	4%	2%	5%	2%	3%	1%
Dissatisfied	2%	1%	1%	1%	1%	1%	1%	<1%
Very Dissatisfied	<1%	<1%	<1%	<1%	<1%	<1%	1%	<1%

CROSSTABULATIONS: SATISFACTION WITH SERVICE

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2023	2024	2023	2024	2023	2024	2023	2024
Very Satisfied	57%	64%	54%	55%	63%	59%	54%	62%
Satisfied	35%	32%	40%	41%	32%	37%	39%	34%
Unsure/don't know	5%	2%	6%	4%	3%	3%	6%	4%
Dissatisfied	3%	2%	<1%	<1%	1%	1%	1%	<1%
Very Dissatisfied	<1%	<1%	<1%	<1%	1%	<1%	<1%	<1%

SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

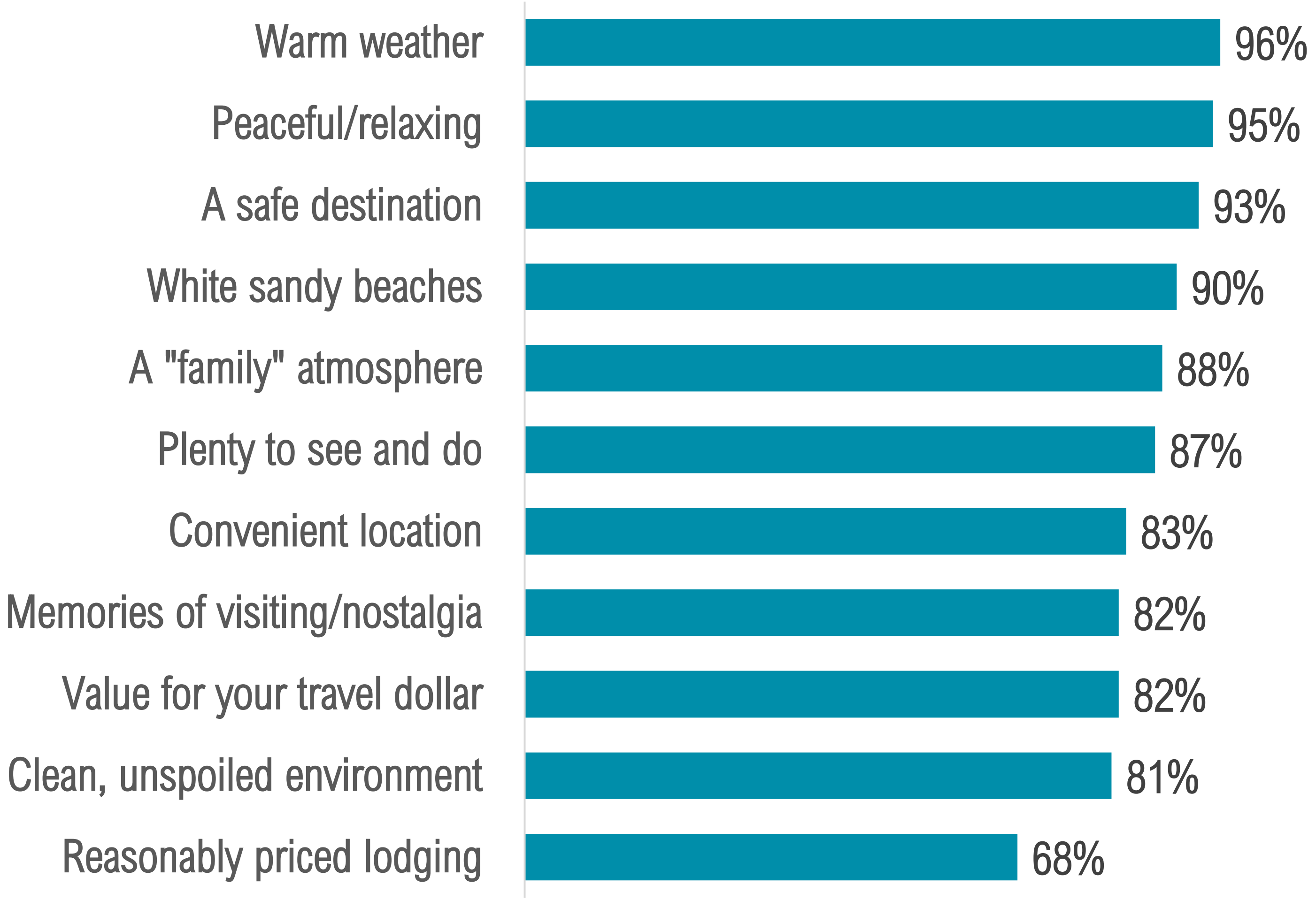


SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

	1st Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2023	2024	2023	2024	2023	2024	2023	2024
Exceeded Expectations	38%	47%	40%	43%	38%	44%	46%	47%
Met Expectations	54%	47%	55%	53%	56%	51%	44%	50%
Did Not Meet Expectations	8%	6%	5%	4%	6%	5%	10%	3%

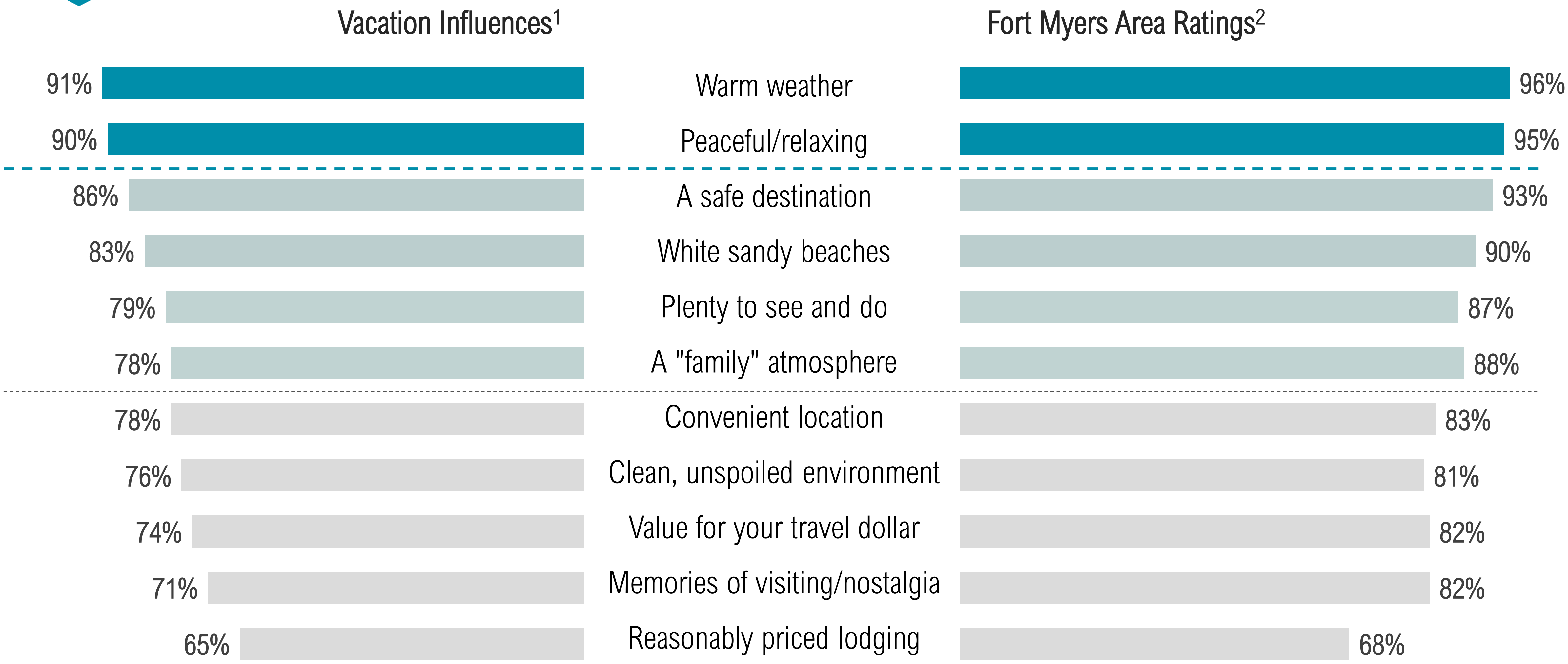
ATTRIBUTE RATINGS[1]

At least **90%** of visitors gave high attribute ratings for **weather, peacefulness, safety,** and **the beaches** in the Fort Myers area.



[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

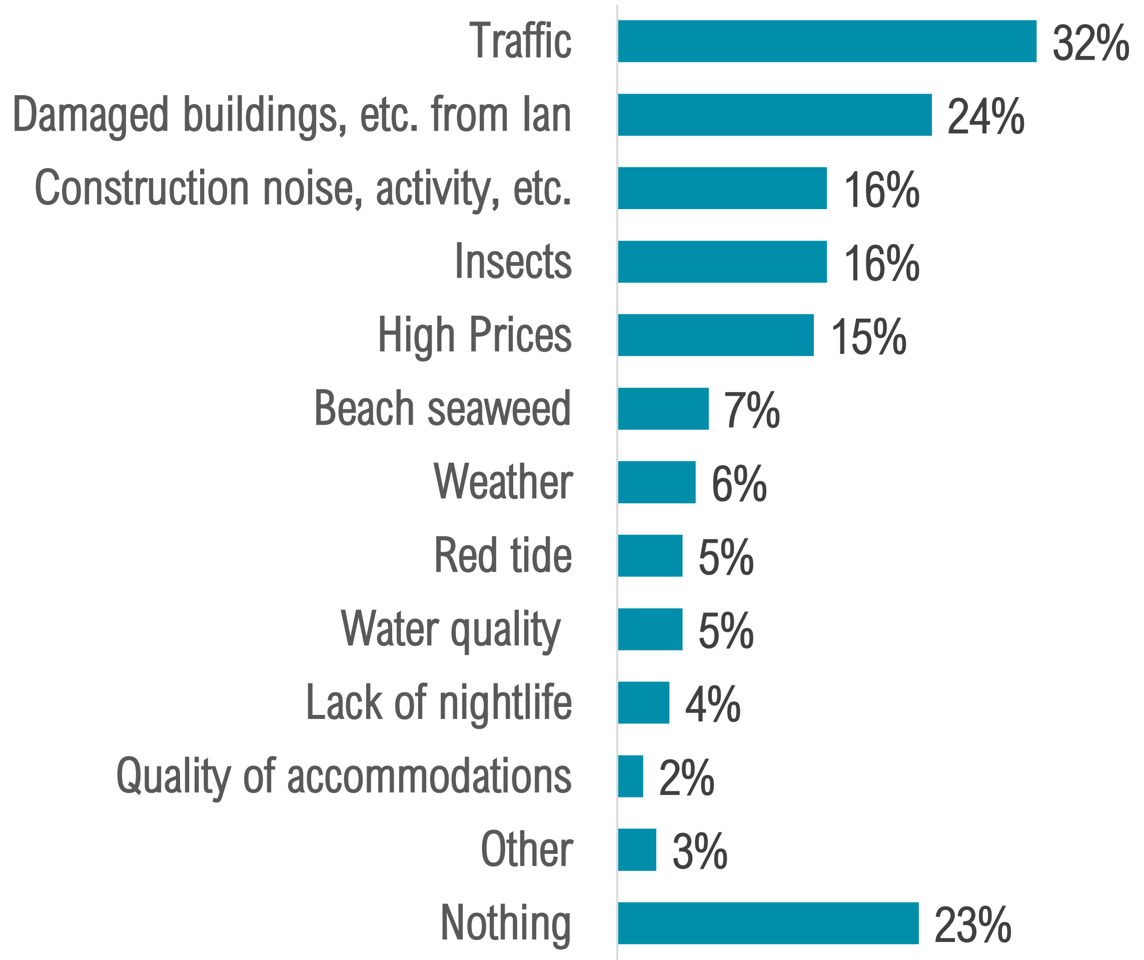


[1]Top 2 box scores. Attributes rated on a scale from 1 to 5 where 1 is Not at All Influential and 5 is Definitely Influential.

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

LEAST LIKED FEATURES[1]

1 in 3 visitors mentioned **traffic,** while **nearly 1 in 4** were concerned with **hurricane damage**, and **23%** had no concerns at all during their visit.



[1]Multiple responses permitted.
During this specific visit, which features have you like the LEAST about our area?

AREA DESCRIPTIONS

Warm Weather

- "Great time with perfect weather, sunshine, great jet skis, and a charter fishing tour."
- "Great time for perfect warm days, cool nights with a lot to do, sunshine, and beautiful sunsets."
- "Great time at the golf tournament with beautiful courses. Tropical landscape and warm weather."

Peaceful & Relaxing

- "It's sunny warm and relaxing and peaceful, although access to the beaches are getting a bit limited for the public."
- "Relaxing and warm, perfect beaches compared to my home area."
- "Really nice beaches. Our timeshare was fun and relaxing."

AREA DESCRIPTIONS

A Safe Destination

- “I love Bonita Springs: safe, calm beach to walk on, pretty sunsets.”
- “It’s our favorite vacation destination with near perfect weather, beautiful beaches, and a lot to do for the family!”
- “Very family-friendly town with close by shopping available and many other things to do.”

White Sandy Beaches

- “Awesome vacation in a gorgeous area with white sandy beaches, palm trees and crystal-clear waters.”
- “Awesome time in a beautiful tropical atmosphere, with great landscapes, white sandy beaches, warm weather, and gorgeous sunsets.”
- “A great time and a great environment, with beautiful beaches and a lot to see and do.”

OCCUPANCY BAROMETER[1]: JUL-SEP RESERVATIONS

Jul - Sep Reservations	Apr – Jun 2023	Apr – Jun 2024
Up	32%	49%
Same	7%	14%
Down	61%	37%

[1]Sources: Occupancy Survey
Accommodations partners were asked the following, "Please think about your reservations for the next three months. Compared to July through September of 2023, would you say the total level of reservations are up, the same, or down?"

OCCUPANCY BAROMETER[1]: OCT-DEC RESERVATIONS

Oct – Dec Reservations	Apr – Jun 2023	Apr – Jun 2024
Up	50%	34%
Same	14%	38%
Down	36%	28%

[1]Sources: Occupancy Survey
Accommodations partners were asked the following, “Please think about your reservations for the next three months. Compared to October through December of 2023, would you say the total level of reservations are up, the same, or down?”

Year-Over-Year Comparisons

ECONOMIC IMPACT

Visitor & Lodging Statistics[1]	Apr - Jun 2023[4]	Apr - Jun 2024	% Change '23 – '24
Visitors	591,600	808,900	+ 36.7%
Visitor Days	3,622,600	4,999,000	+ 38.0%
Room Nights	864,200	1,029,300	+ 19.1%
Direct Expenditures[2]	$568,611,600	$747,288,600	+ 31.4%
Total Economic Impact[3]	$910,347,200	$1,190,430,700	+ 30.8%
Occupancy	53.3%	55.8%	+ 4.7%
ADR	$151.93	$170.05	+ 11.9%
RevPAR	$80.92	$94.83	+ 17.2%

[1] Significantly more units were available in Apr-Jun 2024 compared to Apr-Jun 2023. This is due to the ongoing recovery process post-Hurricane Ian.
[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.
[4] Data has been revised to reflect updated unit figures for RV Parks & Campgrounds as determined in a survey of Lee County RV Parks & Campgrounds conducted by DSG Research.

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM[1]

	Apr - Jun 2023	Apr - Jun 2024	% Change '23 – '24
Direct Jobs[2]	6,500	7,610	17.1%
Total Jobs[3]	8,670	10,200	17.6%
Direct Wages[2]	$211,987,300	$262,529,500	23.8%
Total Wages[3]	$301,388,800	$370,708,400	23.0%
Direct Local Taxes[2]	$24,511,909	$32,670,701	33.3%
Total Local Taxes[3]	$34,330,508	$43,227,443	25.9%
Direct State Taxes[2]	$21,398,585	$34,995,472	63.5%
Total State Taxes[3]	$30,113,178	$46,560,335	54.6%

[1] Calculated using IMPLAN, an economic impact analysis software.
[2] Only accounts for the money spent directly by visitors in categories such as accommodations, restaurants, entertainment, shopping, transportation, groceries, and "other" expenses.
[3] Accounts for direct spending as well as the indirect and induced effects of visitor spending. In other words, it considers the "Total Economic Impact". As a reminder, indirect effects include increased business spending resulting from tourism dollars, while induced effects include increased household spending resulting from tourism dollars.

VISITOR TYPE

Visitor Type	Apr - Jun 2023	Apr - Jun 2024
Visitors in Paid Accommodations	68%	66%
Visitors in Non-Paid Accommodations	30%	33%
Day Trippers	2%	1%

PRE-VISIT

Planned trip in advance	Apr - Jun 2023	Apr - Jun 2024
1 week or less	6%	5%
2-4 weeks	14%	12%
1-2 months	32%	39%
3-6 months	31%	31%
6 months or more	17%	13%
Not sure	<1%	<1%

Considered Other Destinations	Apr - Jun 2023	Apr - Jun 2024
Yes	29%	29%
No	71%	71%

PRE-VISIT

Other destinations considered[1]	Apr - Jun 2023[2]	Apr - Jun 2024[2]
Naples/Marco Island	15%	21%
Sarasota/Siesta Key	20%	18%
Tampa/Clearwater/St.Pete	18%	15%
Keys/Key West	13%	11%
Miami/Ft. Lauderdale	6%	11%
Orlando	12%	10%
Punta Gorda/Englewood	2%	8%
Daytona Beach	10%	6%
West Palm Beach	9%	5%
Other destinations in FL	10%	16%
Other destinations outside of FL	21%	21%

[1]Multiple responses permitted.
[2]Base: 29% of visitors who considered other destinations.

PRE-VISIT

Trip Planning Websites/Apps[1]	Apr - Jun 2023	Apr - Jun 2024
Airline websites/apps	30%	33%
Online search engines	29%	28%
Airbnb, Vrbo, etc.	22%	22%
Booking websites	15%	19%
Vacation rental websites/apps	16%	18%
Hotel websites/apps	14%	16%
TripAdvisor	13%	9%
Traveler reviews, blogs, stories	11%	8%
www.VisitFortMyers.com	8%	7%
VCB Facebook Page	9%	7%
Visit Florida	8%	5%
Facebook	7%	5%
Instagram	4%	3%
YouTube, Hulu, Pandora	4%	3%
Other	2%	3%
None	22%	22%

[1]Multiple responses permitted.

PRE-VISIT

Information Requests[1]	Apr - Jun 2023	Apr - Jun 2024
Calling the VCB	11%	5%
Calling a hotel, motel, condo	20%	20%
Requesting and receiving a visitor guide	3%	5%
Receiving the VCB e-newsletter	2%	2%
Calling a local Chamber of Commerce	1%	1%
Other	2%	2%
None	70%	74%

[1]Multiple responses permitted.

PRE-VISIT

Recall of Lee County Promotions	Apr - Jun 2023	Apr - Jun 2024
Yes	42%	37%
No	40%	46%
Not sure	18%	17%
% of recallers influenced by promotions	50%	51%
% of total visitors influenced by promotions	22%	19%

PRE-VISIT

Type of Promotions Recalled[1]	Apr - Jun 2023[2]	Apr - Jun 2024[3]
Internet	48%	44%
Social media	33%	35%
Traveler reviews, blogs	17%	18%
Television	16%	14%
Magazine	9%	9%
www.VisitFortMyers.com	9%	9%
Newspaper	10%	8%
Travel/visitor guide	8%	8%
Email/e-newsletter	9%	8%
Brochure	6%	6%
Billboard	3%	5%
Video streaming services	6%	5%
AAA	6%	4%
Radio	4%	3%
Deal-based promotion	2%	1%
Music streaming services	<1%	1%
Podcasts	<1%	<1%
Other	2%	3%

[1]Multiple responses permitted.
[2]Base: 42% of visitors who recalled seeing a promotion.
[3]Base: 37% of visitors who recalled seeing a promotion.

PRE-VISIT

Characteristics influencing decision to visit Lee County (top 2 boxes)[1]	Apr - Jun 2023	Apr - Jun 2024
Warm weather	96%	96%
Peaceful/relaxing	93%	95%
A safe destination	91%	93%
White sandy beaches	84%	90%
A "family" atmosphere	84%	88%
Plenty to see and do	86%	87%
Convenient location	79%	83%
Memories of visiting/nostalgia	81%	82%
Value for your travel dollar	77%	82%
Clean, unspoiled environment	75%	81%
Reasonably priced lodging	64%	68%

[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.

PRE-VISIT

Main Reason for Visiting[1]	Apr - Jun 2023	Apr - Jun 2024
Relax & unwind	39%	50%
Beach	33%	42%
Visiting friends & relatives	30%	35%
Checking on my property	9%	12%
Part-time resident ("Snowbird")	2%	11%
Fishing	9%	11%
Special occasion	10%	11%
Golf or tennis	5%	7%
Nature, environment, bird watching	6%	7%
Attractions	5%	6%
Shopping	7%	6%
Water sports	4%	4%
Business meetings/conferences	5%	3%
Sporting event	4%	3%
Special event	3%	3%
Work-related Hurricane Recovery	5%	2%
Museums, history	3%	2%
Biking, hiking	2%	2%
Photography	2%	2%
Guided tours	1%	1%
Diving, snorkeling	2%	1%
Culture	2%	1%
Volunteering	2%	1%
Other	5%	5%

[1]Multiple responses permitted.

PRE-VISIT

Transportation	Apr - Jun 2023	Apr - Jun 2024
Fly	67%	66%
Drive a personal vehicle	27%	30%
Drive a rental vehicle	5%	3%
Drive a RV	1%	1%
Travel by bus	<1%	<1%
Other	<1%	<1%

Airport Used	Apr - Jun 2023	Apr - Jun 2024
Southwest Florida International	85%	81%
Miami International	2%	2%
Ft. Lauderdale International	2%	2%
Orlando International	2%	1%
Tampa International	1%	<1%
Punta Gorda	7%	13%
Other	1%	1%

TRAVEL PARTY PROFILE

Visitor Origin[1]	Apr - Jun 2023	Apr - Jun 2024
Florida	6.1%	8.7%
Southeast	18.5%	20.5%
Northeast	19.4%	18.6%
Midwest	34.1%	33.4%
West	7.7%	10.2%
Canada	8.5%	5.0%
United Kingdom	1.0%	0.6%
Germany	2.3%	1.4%
Other Europe	0.7%	0.4%
Other International	1.7%	1.2%

Visitor Origin[1]	Apr - Jun 2023	Apr - Jun 2024
New York	5%	5%
Chicago	4%	5%
Minneapolis - Saint Paul	3%	4%
Atlanta	4%	4%
Indianapolis	1%	3%
Boston	3%	3%
Detroit	3%	3%

[1]Based on data from the Visitor Tracking Study.

TRAVEL PARTY PROFILE

Travel Parties	Apr - Jun 2023	Apr - Jun 2024
Mean travel party size[1]	2.8	3.0
Travel with children under age 18	35%	34%

Travel Party Composition	Apr - Jun 2023	Apr - Jun 2024
As a family	42%	40%
As a couple	34%	38%
By yourself	9%	10%
With other couples/friends	10%	9%
With business associates	3%	2%
In a tour group	1%	<1%
Other	1%	1%

[1]Sources: Occupancy Study and Visitor Tracking Study

TRAVEL PARTY PROFILE

Marital Status	Apr - Jun 2023	Apr - Jun 2024
Married/Domestic Partnership	74%	78%
Single	26%	22%

Age	Apr - Jun 2023	Apr - Jun 2024
Average age	51	50
Median age	50	50

Household Income	Apr - Jun 2023	Apr - Jun 2024
Median Income	$107,600	$106,800

TRAVEL PARTY PROFILE

Race/Ethnicity	Apr - Jun 2023	Apr - Jun 2024
Caucasian/White	79%	80%
Hispanic/Latino/Latina/Latinx	11%	13%
African American/Black	4%	4%
Asian/Asian American/Pacific Islander	2%	2%
Middle Eastern/Northern African	1%	<1%
Another race/ethnicity	3%	1%

Gender[1]	Apr - Jun 2023	Apr - Jun 2024
Female	52%	53%
Male	47%	46%
Non-binary	1%	1%

[1]Of person interviewed.

TRIP EXPERIENCE

Length of Stay[1]	Apr - Jun 2023	Apr - Jun 2024
Average nights in the Fort Myers area	6.1	6.2

First Time/Repeat Visitors	Apr - Jun 2023	Apr - Jun 2024
First-time	30%	26%
Repeat	70%	74%

[1]Sources: Occupancy Study & Visitor Tracking Survey.

TRIP EXPERIENCE

Type of Accommodations	Apr - Jun 2023	Apr - Jun 2024
Vacation rental home	29%	32%
Hotel/motel/resort	34%	31%
Personal condo, house, timeshare, etc.	15%	18%
Friends/family home	15%	15%
Bed & Breakfast/Inn	2%	2%
Campground/RV Park	2%	1%
Not spending the night	2%	1%
Other	1%	<1%

TRIP EXPERIENCE

Activities[1]	Apr - Jun 2023	Apr - Jun 2024
Relax and unwind	58%	72%
Beach	54%	68%
Restaurants	65%	63%
Visit friends/relatives	43%	51%
Shopping	41%	39%
Fishing	21%	26%
Nature, environment, bird watching	23%	24%
Water sports	16%	22%
Golf or tennis	14%	17%
Attractions	14%	15%
Bars, nightclubs	15%	13%
Special occasion	10%	12%
Biking, hiking	13%	9%
Museums, history	7%	9%
Photography	7%	8%
Guided tours	7%	8%
Special events	6%	8%
Culture	6%	8%
Diving, snorkeling	5%	6%
Attend or participate in a sporting event	8%	5%
Spas	4%	3%
Business meetings/conferences	5%	3%
Volunteering	6%	3%
Other	1%	1%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Attractions[1]	Apr - Jun 2023	Apr - Jun 2024
Beaches	54%	68%
Bell Tower Shops	21%	29%
Edison & Ford Winter Estates	19%	26%
Sanibel Lighthouse[3]	12%	26%
Gulf Coast Town Center	19%	17%
Shell Factory and Nature Park	12%	15%
Coconut Point Mall	15%	15%
Miromar Outlets Mall	14%	12%
Fort Myers Beach Pier Area[2]	11%	10%
J.N. Ding Darling National Wildlife Refuge	7%	8%
Bailey-Matthews Shell Museum	5%	6%
Manatee Park	4%	3%
Periwinkle Place[3]	<1%	3%
Broadway Palm Dinner Theater	2%	2%
Barbara B. Mann Performing Arts Hall	2%	2%
Other	2%	4%
None	16%	11%

[1]Multiple responses permitted.
[2]Represents visitors who spent time on the beach area near where the pier was.
[3]Was partially or completely closed during this period in 2023 but has since re-opened.

TRIP EXPERIENCE

Area stayed	Apr - Jun 2023	Apr - Jun 2024
Fort Myers	36%	33%
Cape Coral	24%	18%
Fort Myers Beach	6%	11%
Bonita Springs	9%	11%
Sanibel Island	4%	7%
Estero	5%	6%
Captiva Island	5%	6%
North Fort Myers	3%	2%
Lehigh Acres	2%	2%
Boca Grande/Outer Islands	1%	1%
Along I-75	2%	1%
Pine Island	1%	1%
None/not staying overnight	2%	1%

POST-TRIP EVALUATION

Likelihood of Recommending the Area	Apr - Jun 2023	Apr - Jun 2024
Very Likely	49%	49%
Likely	41%	44%
Unsure/don't know	8%	6%
Unlikely	1%	1%
Very Unlikely	1%	<1%

Likelihood of Returning to the Area	Apr - Jun 2023	Apr - Jun 2024
Very Likely	54%	53%
Likely	33%	38%
Unsure/don't know	10%	8%
Unlikely	2%	1%
Very Unlikely	1%	<1%

Likelihood of Returning Next Year	Apr - Jun 2023	Apr - Jun 2024
Very Likely	47%	47%
Likely	29%	26%
Unsure/don't know	20%	22%
Unlikely	3%	4%
Very Unlikely	1%	1%

POST-TRIP EVALUATION

Satisfaction with Accommodations	Apr - Jun 2023	Apr - Jun 2024
Exceeded expectations	39%	45%
Met expectations	54%	50%
Did not meet expectations	7%	5%

POST-TRIP EVALUATION

Satisfaction with Visit	Apr - Jun 2023	Apr - Jun 2024
Very satisfied	56%	57%
Satisfied	38%	39%
Neither	4%	2%
Dissatisfied	1%	1%
Very dissatisfied	<1%	<1%
Don't know/no opinion	1%	1%

Satisfaction with Customer Service	Apr - Jun 2023	Apr - Jun 2024
Very satisfied	55%	56%
Satisfied	38%	39%
Somewhat satisfied	4%	3%
Dissatisfied	1%	1%
Very dissatisfied	<1%	<1%
Don't know/no opinion	2%	1%

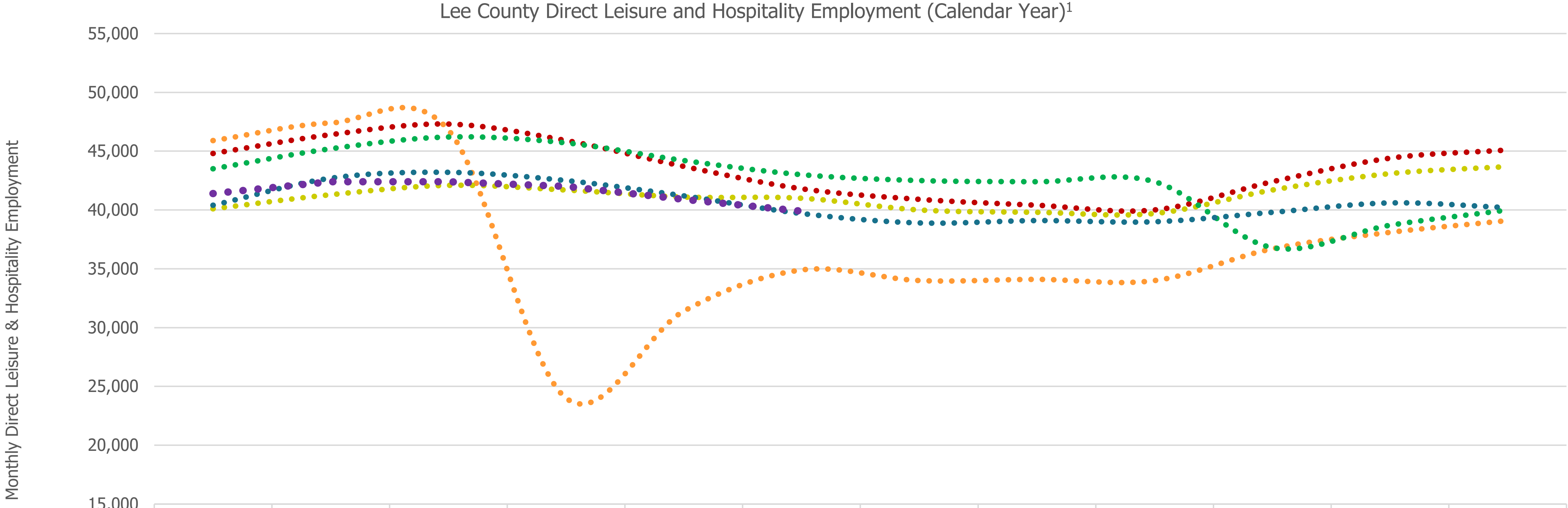
POST-TRIP EVALUATION

Visitor Concerns[1]	Apr - Jun 2023	Apr - Jun 2024
Traffic	32%	32%
Damaged buildings, etc. from Ian	28%	24%
Construction noise, activity, etc.	4%	16%
Insects	12%	16%
High Prices	17%	15%
Beach seaweed	8%	7%
Weather	2%	6%
Red tide	14%	5%
Water quality	6%	5%
Lack of nightlife	4%	4%
Quality of accommodations	3%	2%
Other	2%	3%
Nothing	27%	23%

[1]Multiple responses permitted.

Industry Data

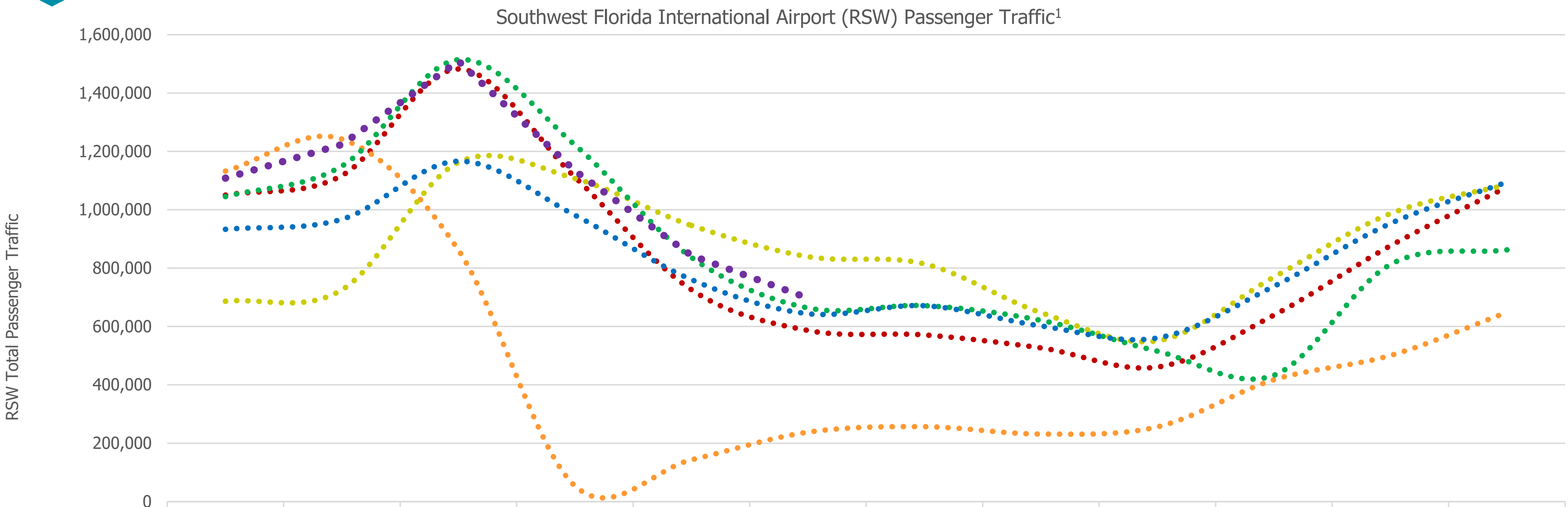
LEISURE & HOSPITALTY EMPLOYMENT



	January	February	March	April	May	June	July	August	September	October	November	December
2019	44,800	46,400	47,300	45,900	43,700	41,800	40,900	40,400	40,000	42,400	44,400	45,100
2020	45,900	47,400	46,800	24,000	31,400	34,900	34,000	34,100	34,000	36,700	38,100	39,100
2021	40,100	41,300	42,100	41,700	41,100	41,000	40,000	39,800	39,700	41,700	43,100	43,700
2022	43,500	45,200	46,200	45,700	44,200	43,000	42,500	42,400	42,400	36,800	38,700	40,000
2023	40,400	42,700	43,200	42,500	41,200	39,700	38,900	39,100	39,000	39,800	40,600	40,200
2024	41,400	42,400	42,400	42,000	40,900	39,900 (P)						

[1] SOURCE: Current Employment Statistic Program (CES), Lee County Leisure and Hospitality Sector, not seasonally adjusted.
(P) Preliminary.

RSW PASSENGER TRAFFIC



	January	February	March	April	May	June	July	August	September	October	November	December
2019	1,050,093	1,117,409	1,482,239	1,111,558	725,754	586,319	570,977	526,519	460,869	638,922	876,703	1,077,818
2020	1,132,103	1,241,590	861,221	53,379	143,004	237,706	256,418	231,283	255,926	417,305	500,468	648,011
2021	686,563	725,735	1,162,342	1,107,004	946,366	839,377	814,471	647,534	551,041	769,524	986,908	1,085,569
2022	1,044,816	1,149,618	1,514,046	1,221,628	836,379	663,141	671,225	620,532	515,007	432,667	812,305	862,368
2023	932,896	967,416	1,166,442	981,216	760,330	643,486	670,818	601,542	560,358	737,527	953,025	1,094,783
2024	1,108,190	1,223,761	1,509,777	1,133,256	843,270	696,867						

[1] SOURCE: Lee County Port Authority Monthly Statistics.

LICENSED TRANSIENT RENTAL UNITS

Licensed Transient Rental Units in Lee County, as of July 2024[1]

	Hotel	Motel	Bed & Breakfast	Vacation Rental	Total
Fort Myers	5,629	1,152	9	576	**7,366**
Cape Coral	584	204	0	2593	**3,381**
Fort Myers Beach	861	392	6	1871	**3,130**
Sanibel	68	685	0	1696	**2,449**
Bonita Springs	1,244	38	0	546	**1,828**
North Fort Myers	0	578	0	57	**635**
Estero	566	0	0	26	**592**
Captiva	107	156	0	322	**585**
Boca Grande	77	107	0	260	**444**
Lehigh Acres	75	0	0	192	**267**
Saint James City	0	20	0	54	**74**
Bokeelia	0	31	0	39	**70**
Matlacha	0	0	2	27	**29**
Cabbage Key	0	9	0	0	**9**
Iona	0	0	0	1	**1**
Pineland	0	0	0	1	**1**
Miromar Lakes	0	0	0	1	**1**
Alva	0	0	0	1	**1**
Total	**9,211**	**3,372**	**17**	**8,263**	**20,863[2]**

[1] SOURCE: Florida Department of Business & Professional Regulation.
[2] Some units likely are still unavailable due to the impact of Hurricane Ian.

Methodology

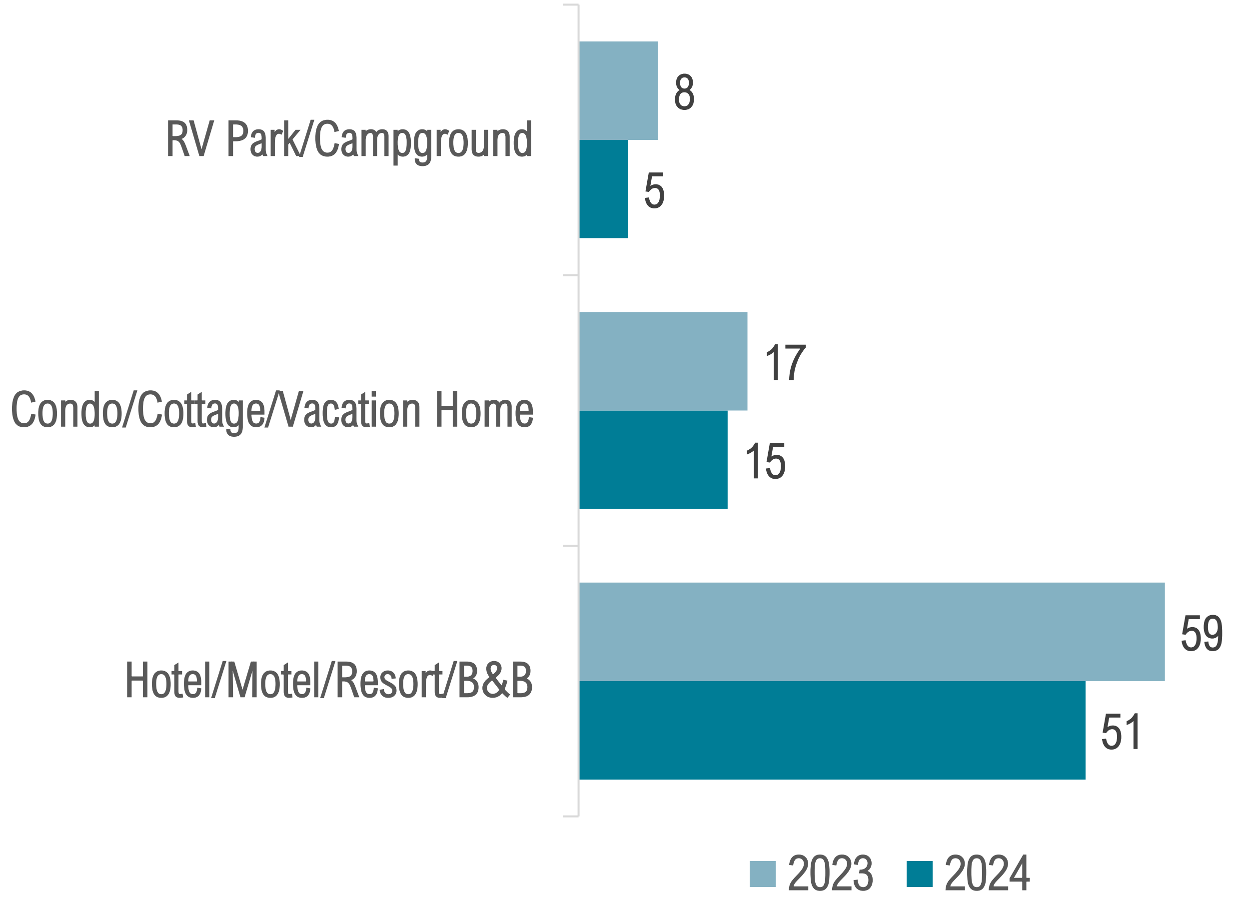
METHODOLOGY

- Economic Impact of tourism in Lee County is derived from:
  - Visitor Tracking Study
    - 923 surveys in public areas, hotels, at events around Lee County, and online
    - Target individuals: April - June visitors to Lee County
    - Data Collection: April - June 2024
  - Occupancy Study
    - Email and telephone survey of hotels, rental management companies, RV/campgrounds, etc., as well as data from STR and KeyData reports
    - Sample Size – data from 6,439 hotel/rental/campground units (71 properties) reporting to DSG, 9,685 hotel units reporting to STR (79 properties), and 2,883 rental units (84 property managers) reporting to KeyData
  - 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 including Florida Department of Business and Professional Regulation
  - TDT collections provided by the Lee County VCB
  - Tourism database at Downs & St. Germain Research

METHODOLOGY[1]

- Occupancy Study
  - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc.
    - Sample Size: 71 completed surveys
    - Data Collection: Completed in July (for Apr - Jun 2024)
  - Total Sample Size:
    - Data from 6,439 hotel/rental/campground units reporting to DSG (representing 71 properties)
    - Data from 9,685 hotel units reporting to STR (representing 79 properties)
    - Data from 2,883 rental units reporting to KeyData (representing 84 property managers)

Number of Complete Responses



Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

Apr - Jun 2024

Visitor Tracking, Occupancy, & Economic Impact Study

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Executive Director

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fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

downs & st. germain RESEARCH