Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

Oct - Dec 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

Oct - Dec 2024

→ **Visitation** in Oct - Dec 2024 was **up 7.6%** and **room nights** were **up 6.1%** Year-over-Year.

→ **Direct Spending** was **up 3.2%** and **Economic Impact of Tourism** was **up 2.7%**, when compared to October-December 2023.

→ The share of **visitors who considered visiting other destinations in FL nearly doubled**, from **3.5% to 6.2%**, following the **general trends** of **increased competition** as well as **visitors actively seeking out lesser traveled destinations** and **unique experiences**.

→ **In-State visitation increased** from **6.7% to 8.6%,** with **most of this growth coming from** southeast Florida markets like **Miami-Ft. Lauderdale** and **West Palm Beach-Ft. Pierce**.

58.0%	$154.37	$89.53
OCCUPANCY RATE	AVERAGE DAILY RATE	REVENUE PER ROOM
↑ 5.0% from 2023	↓ 0.3% from 2023	↑ 4.7% 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 Oct - Dec 2023 VS. 2024

Visitor & Lodging Statistics	Oct - Dec 2023	Oct - Dec 2024	% Change '23-'24
Visitors	806,000	867,200	+ 7.6%
Visitor Days	4,715,100	5,411,300	+ 14.8%
Room Nights	1,016,400	1,078,700	+ 6.1%
Direct Expenditures[1]	$658,633,800	$679,771,800	+ 3.2%
Total Economic Impact[2]	$1,054,472,700	$1,082,876,500	+ 2.7%

[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.

TOURISM SNAPSHOT: KEY METRICS CALENDAR YEAR

Visitor & Lodging Statistics	CY 2023[3]	CY 2024	% Change '23-'24
Visitors	2,771,200	3,199,500	+ 15.5%
Visitor Days	17,576,800	20,420,100	+ 16.2%
Room Nights	3,826,800	4,405,000	+ 15.1%
Direct Expenditures[1]	$2,636,829,100	$3,108,446,700	+ 17.9%
Total Economic Impact[2]	$4,221,563,400	$4,951,755,500	+ 17.3%

[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 in 2023.

OCT-DEC LODGING STATISTICS[1]

58.0%

Occupancy

↑ 5.0%

From 2023

$154.37

Average Daily Rate

↓ 0.3%

From 2023

$89.53

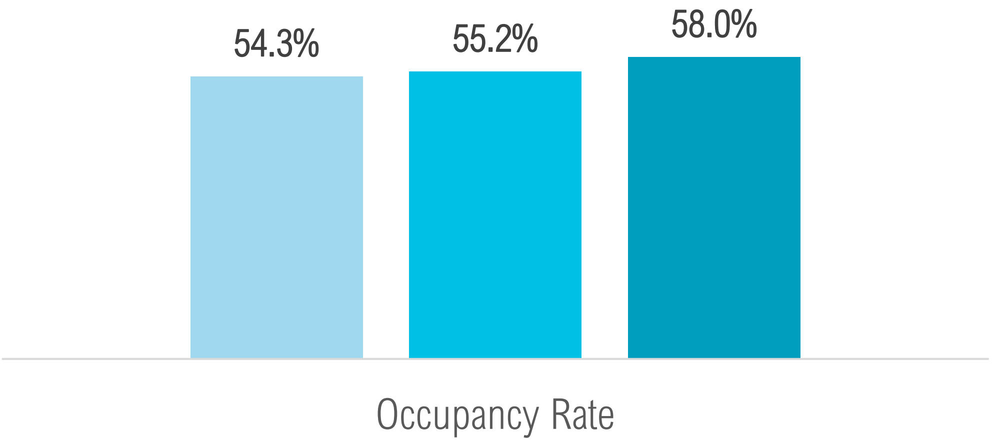
RevPAR

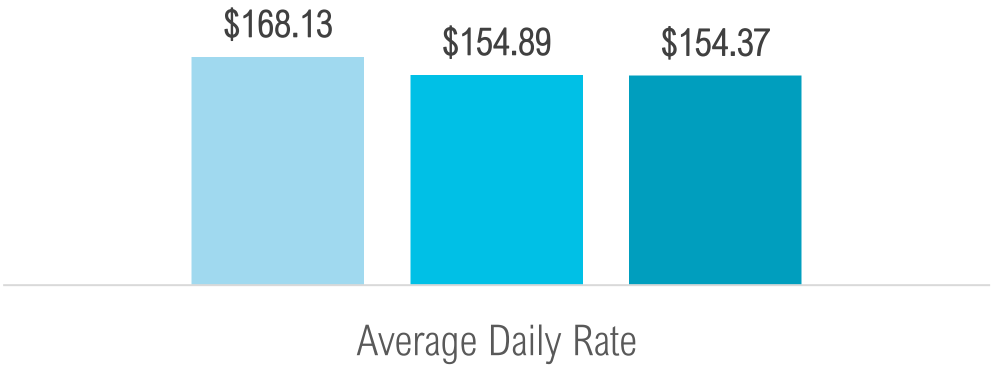
↑ 4.7%

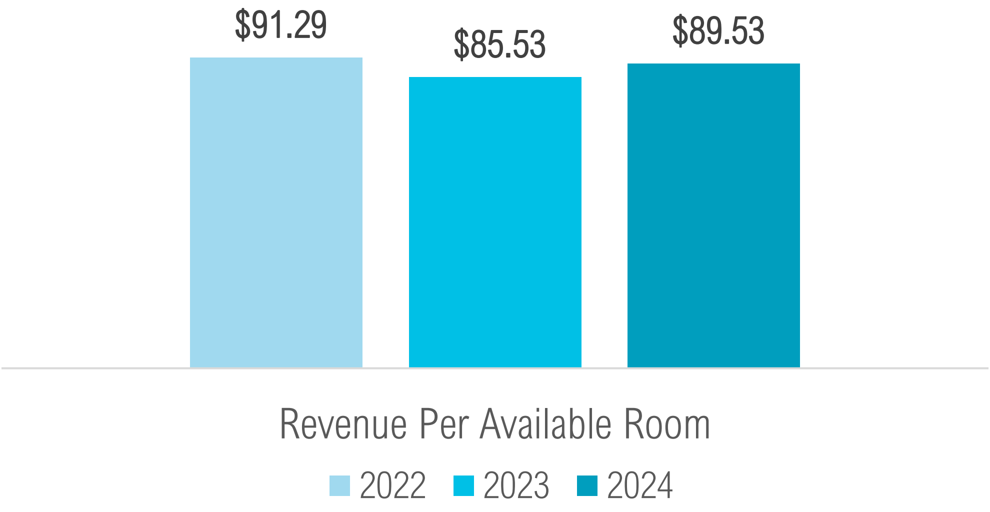
From 2023

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

OCT-DEC 2022-2024 OVERALL LODGING METRICS[1,2]







[1] Sources: STR, KeyData, & DSG Occupancy Study
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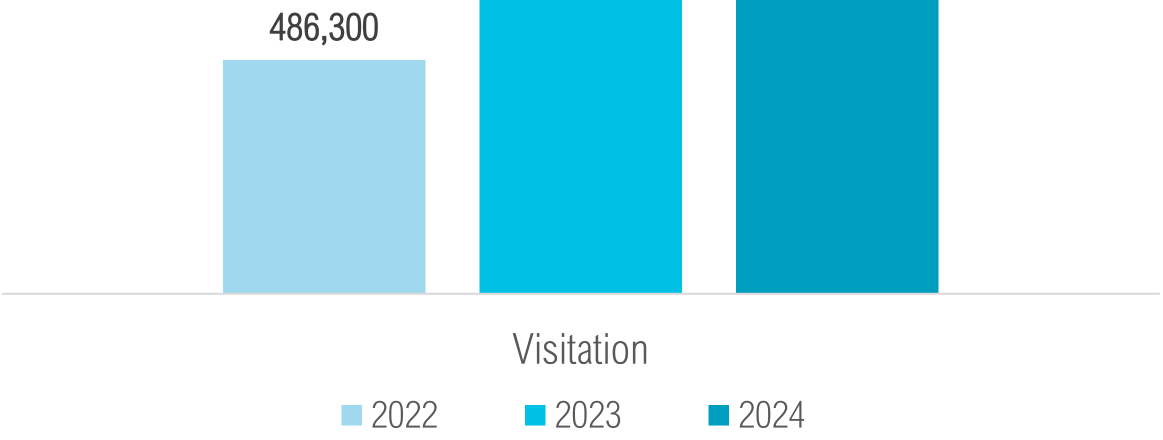
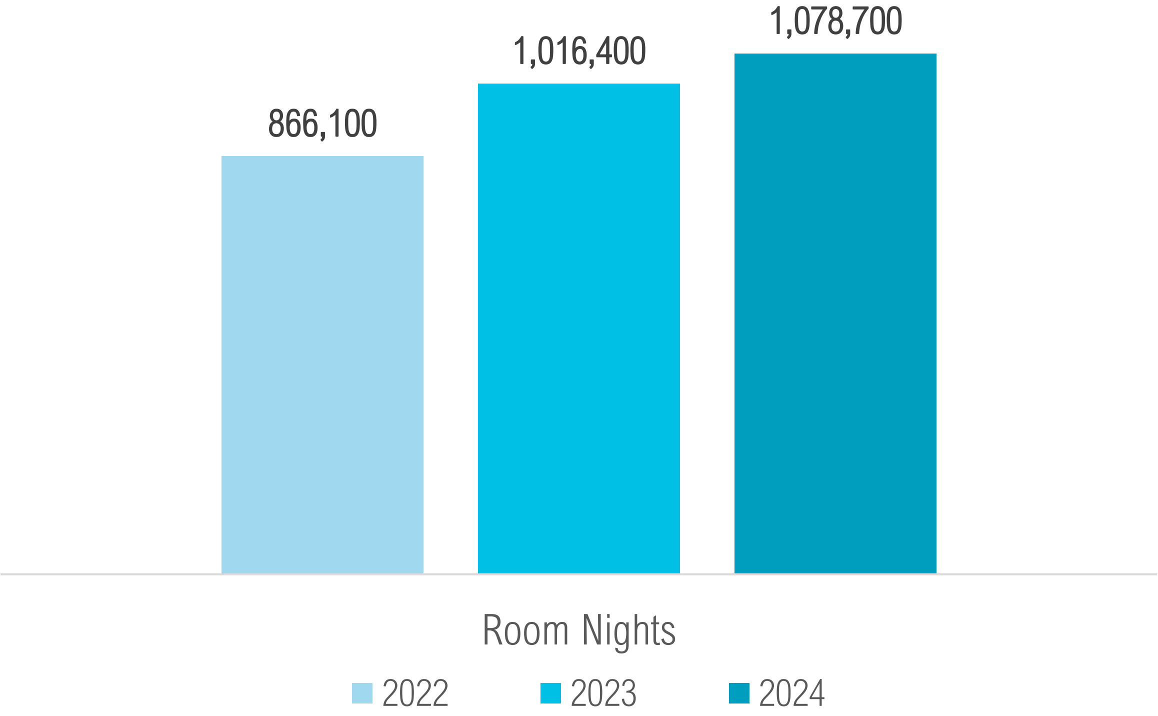
OCT-DEC 2022-2024 VISITATION & ROOM NIGHTS[1,2]

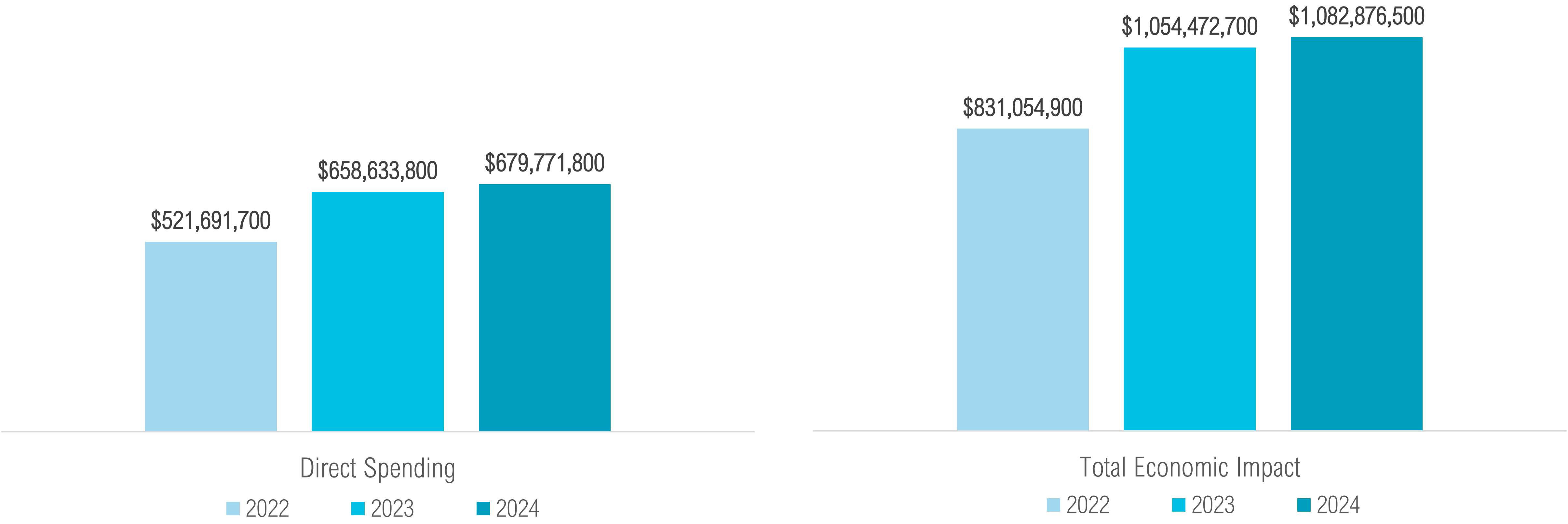




[1] Sources: STR, KeyData, & DSG Occupancy Study

[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.

OCT-DEC 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

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

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**
- **Nearly 1 in 3** visitors **requested information** to plan their trips
  - **Nearly 1 in 5** visitors **called a hotel, motel, or condo**
  - **1 in 10** visitors **requested a visitor guide**
- **24%** 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]:
  - 36% Airline Websites/apps
  - 29% Search Engines
  - 19% Airbnb/Vrbo
  - 16% Hotel Websites/apps
  - 16% Booking Websites/apps
  - 12% Vacation Rental Websites/apps
  - 11% Visit Florida
  - 10% Trip Advisor

[1]Multiple responses permitted.

TOP TRIP INFLUENCES

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

89% Warm weather

88% Peaceful/relaxing

84% 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[1]

40% Relax & unwind

37% Visiting friends & relatives

30% Beach

13% Checking-in on my property

13% Part-time resident ("Snowbird")

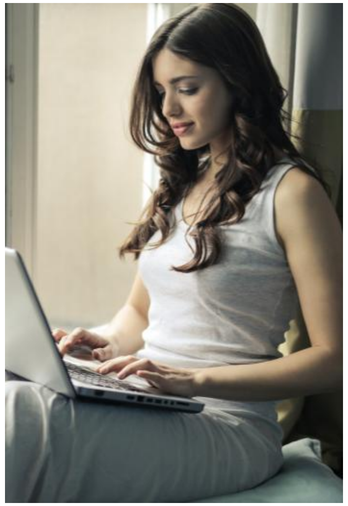
11% Special occasion

10% Golf, tennis, or pickleball

[1]Up to three responses permitted.

PROMOTION RECALL[1]

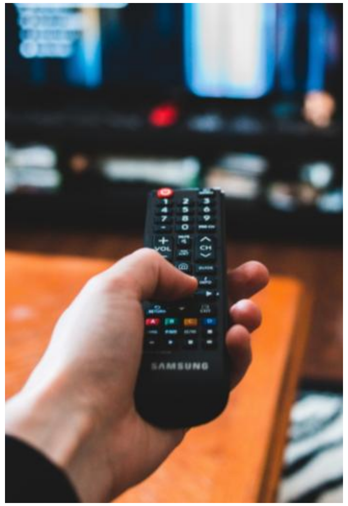
- **Over 1 in 3** visitors **recalled promotions** in the past 6 months for the Fort Myers area
- **20%** of all visitors **were influenced** to come to the Fort Myers area by these promotions
- Top sources of recall include[1]:



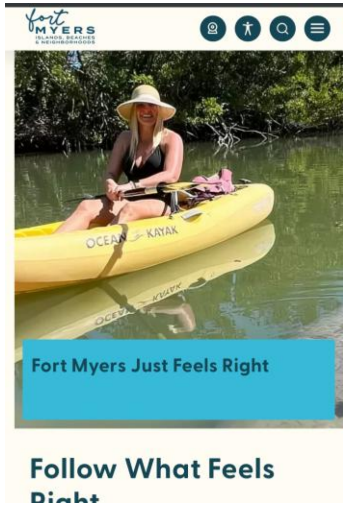
51% Internet

37% Social media

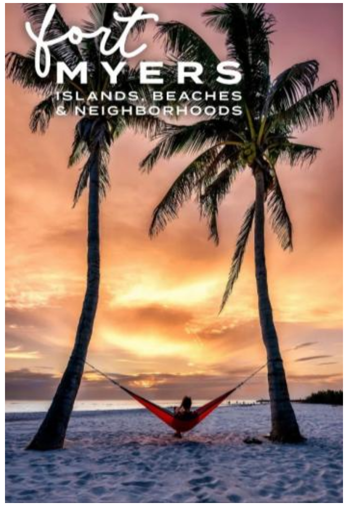
21% Traveler reviews, blogs



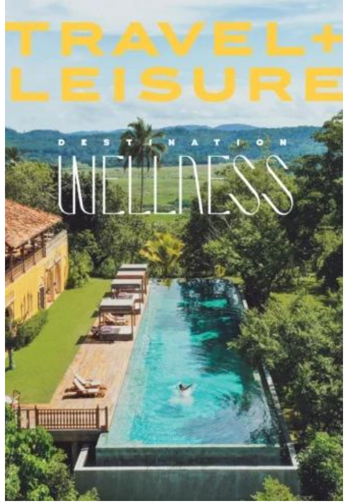
15% Television



13% VCB Website



11% Travel/visitor guide



10% Magazine

[1]Multiple responses permitted.

BOOKING

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

40% Directly with hotel/condo

22% Online travel agency

16% Airbnb

12% Vrbo

TRANSPORTATION

- 71% 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

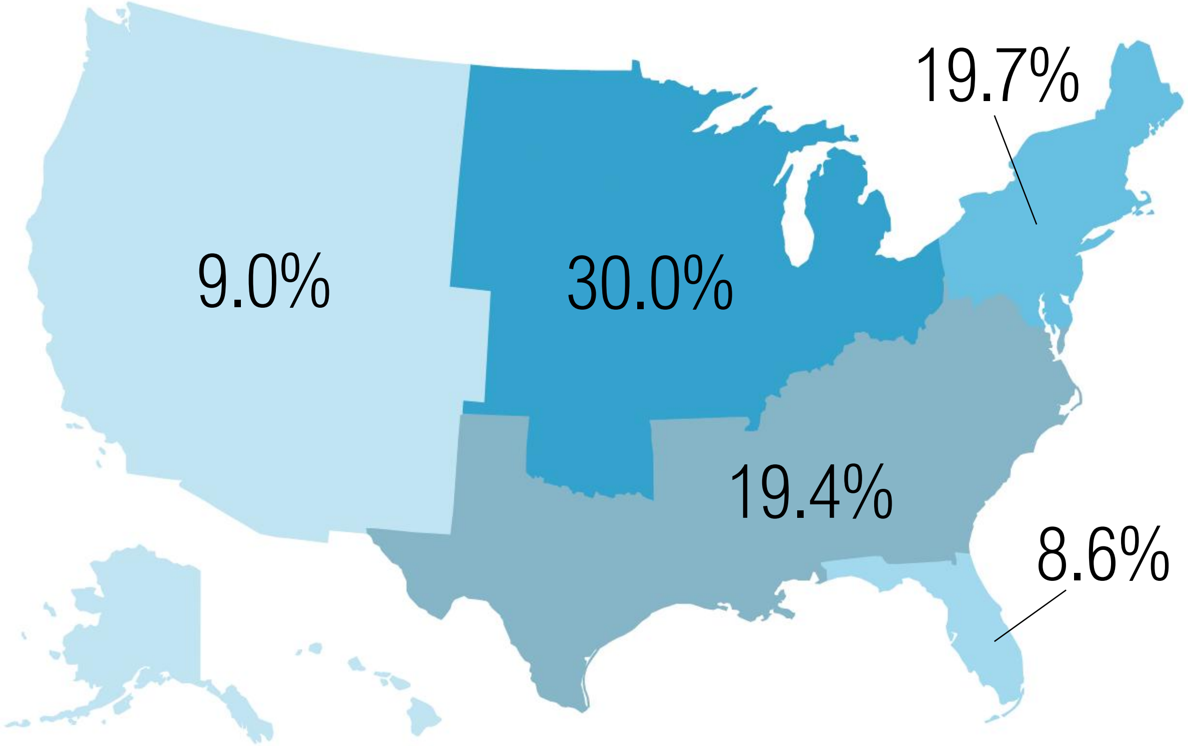
Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

ORIGIN REGION[1]



US = 86.7%

Canada – 6.7%

Germany – 3.1%

3.5% 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]

6% Chicago

5% New York

5% Atlanta

3% Each: **Detroit**, **Philadelphia**, **Minneapolis-St. Paul**, **Boston**, **Washington DC-Hagerstown**, **Miami-Ft. Lauderdale**, and **Denver**

[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]
- 36% traveled with children
- Nearly 2 in 5 visitors traveled as a family, and 36% of visitors traveled as a couple

[1]Sources: Occupancy Study and Visitor Tracking Study

DEMOGRAPHIC PROFILE[1]

October - December Visitors:

- Median age of 51 years old
- Median household income of $108,700
- Married (80%)
- College educated (72%)
- Caucasian/white (78%)

Visitor Journey: Trip Experience

TOP ACCOMMODATIONS

36% Hotel/Motel/Resort

24% Vacation Rental

19% 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
- **21%** were **first time** visitors
- **21%** have visited **more than 10 times**

[1]Sources: Occupancy Study and Visitor Tracking Study

VISITOR ACTIVITIES[1]

64% Dining out

63% Relaxing & unwinding

53% Beach

48% Visit friends/relatives

45% Shopping

27% Fishing

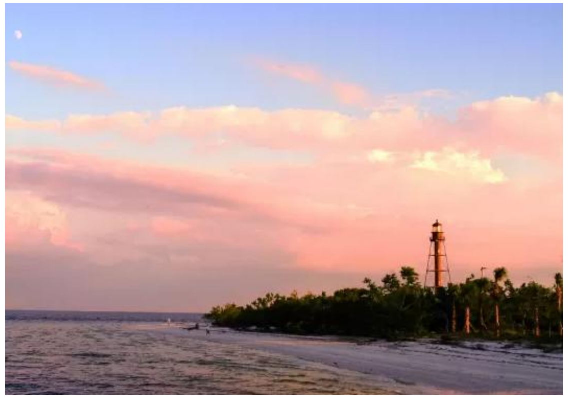
21% Golf, tennis, or pickleball

19% Nature, environment, bird watching

[1]Multiple responses permitted.

TOP ATTRACTIONS VISITED[1]

53% Beaches



25% Sanibel Lighthouse

24% Bell Tower Shops

23% Edison & Ford Estates

[1]Multiple responses permitted.

TOP COMMUNITIES STAYED

38% Fort Myers

16% Cape Coral

12% Fort Myers Beach

9% Bonita Springs

8% Estero

7% Sanibel

VISITOR JOURNEY: POST-TRIP EVALUATION

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

LIKELIHOOD OF RECOMMENDING/RETURNING

- 92% of visitors are likely to recommend the area
  - 45% are very likely to recommend
- 88% of visitors are likely to return
  - 50% are very likely to return
- 69% of visitors are likely to return next year
  - 48% are very likely to return next year

SATISFACTION

- 94% of visitors were satisfied or very satisfied with their overall visit to the Fort Myers area (51% were very satisfied)
- 93% of visitors were satisfied or very satisfied with customer service on their visit (53% were very satisfied)
- 97% of visitors said paid accommodations at least met their expectations (43% said they exceeded expectations)

TOP ATTRIBUTE RATINGS

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

93% Peaceful/relaxing

93% Warm weather

91% 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

- Nearly 1 in 3 visitors mentioned traffic as their least favorite part of their visit.
- 1 in 5 visitors mentioned high prices, while 15% of visitors mentioned damaged buildings, and 14% mentioned construction noise/activity.
- Nearly 1 in 4 visitors said there was nothing they disliked about the area during their visit.

AREA DESCRIPTIONS

Peaceful/relaxing

"Breathtakingly beautiful, peaceful, and rejuvenating."

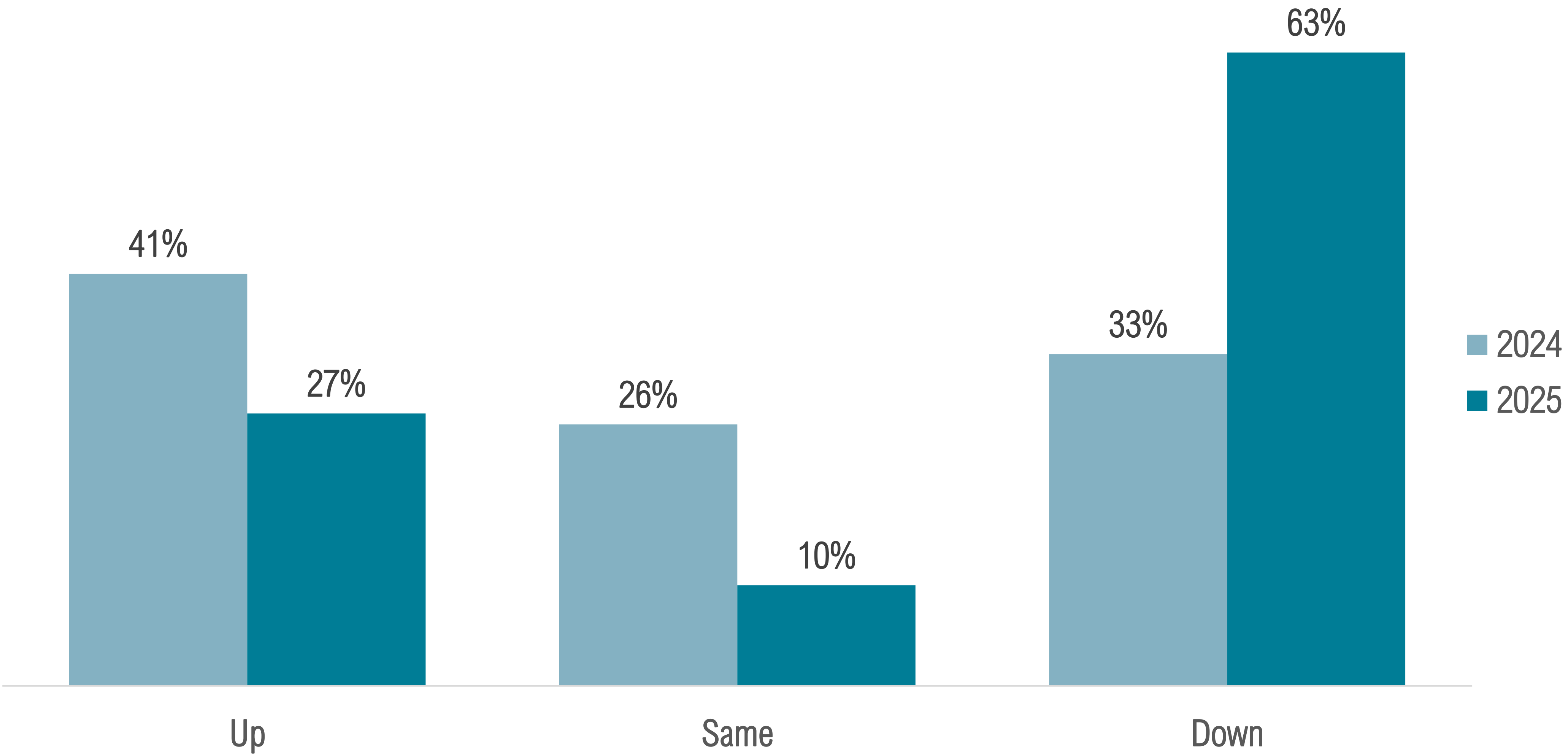
Warm Weather

"A lovely place to visit with great weather this time of year. Warm sunny days to spend at the beach and cool evenings to spend in town."

Safe Destination

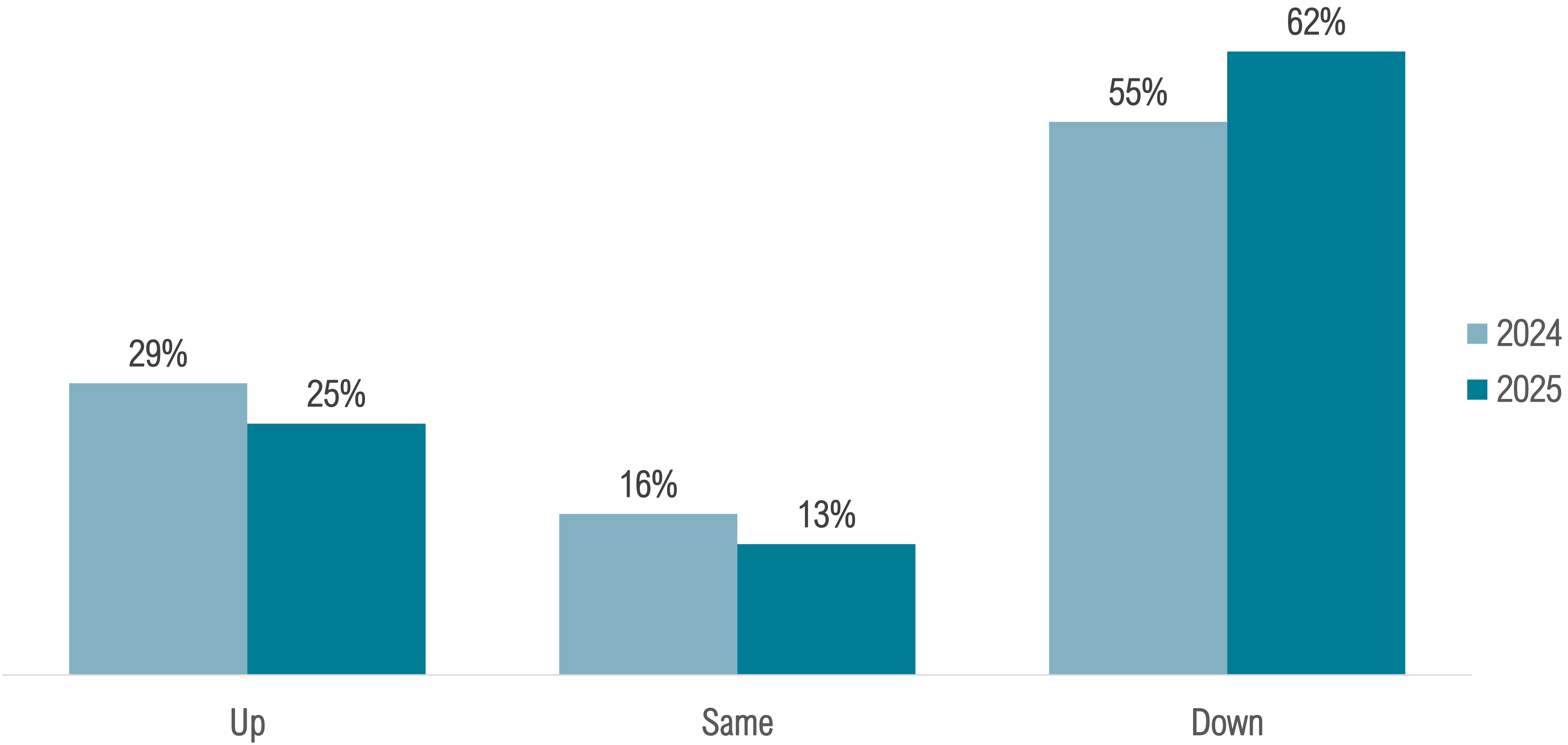
"Whether we're in downtown Fort Myers or out in Fort Myers Beach, we always feel safe and secure, like we're right at home, except it's much warmer here."

OCCUPANCY BAROMETER[1]: JAN – MAR RESERVATIONS



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

OCCUPANCY BAROMETER[1]: APR – JUN RESERVATIONS



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

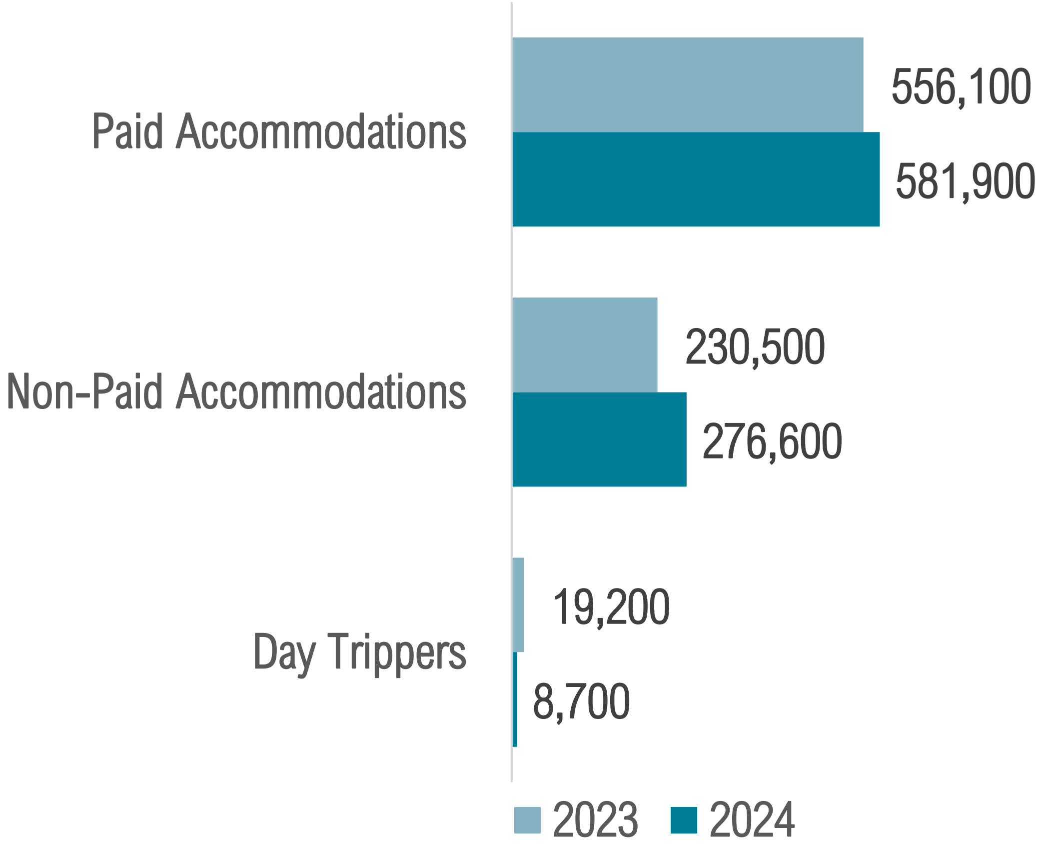
Detailed Findings

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

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

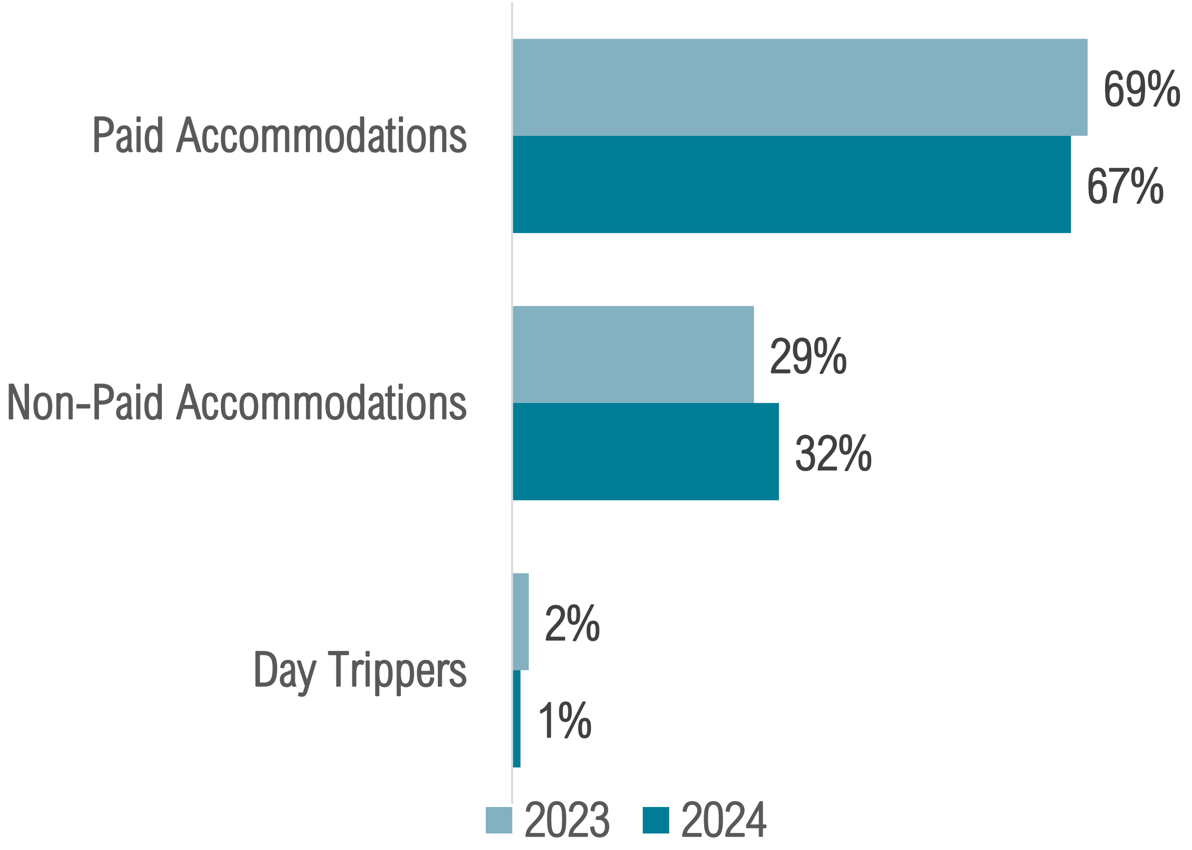
NUMBER OF VISITORS

There were 867,200 visitors to the Fort Myers area in Oct - Dec 2024 (+7.6% from 2023).



VISITOR TYPE

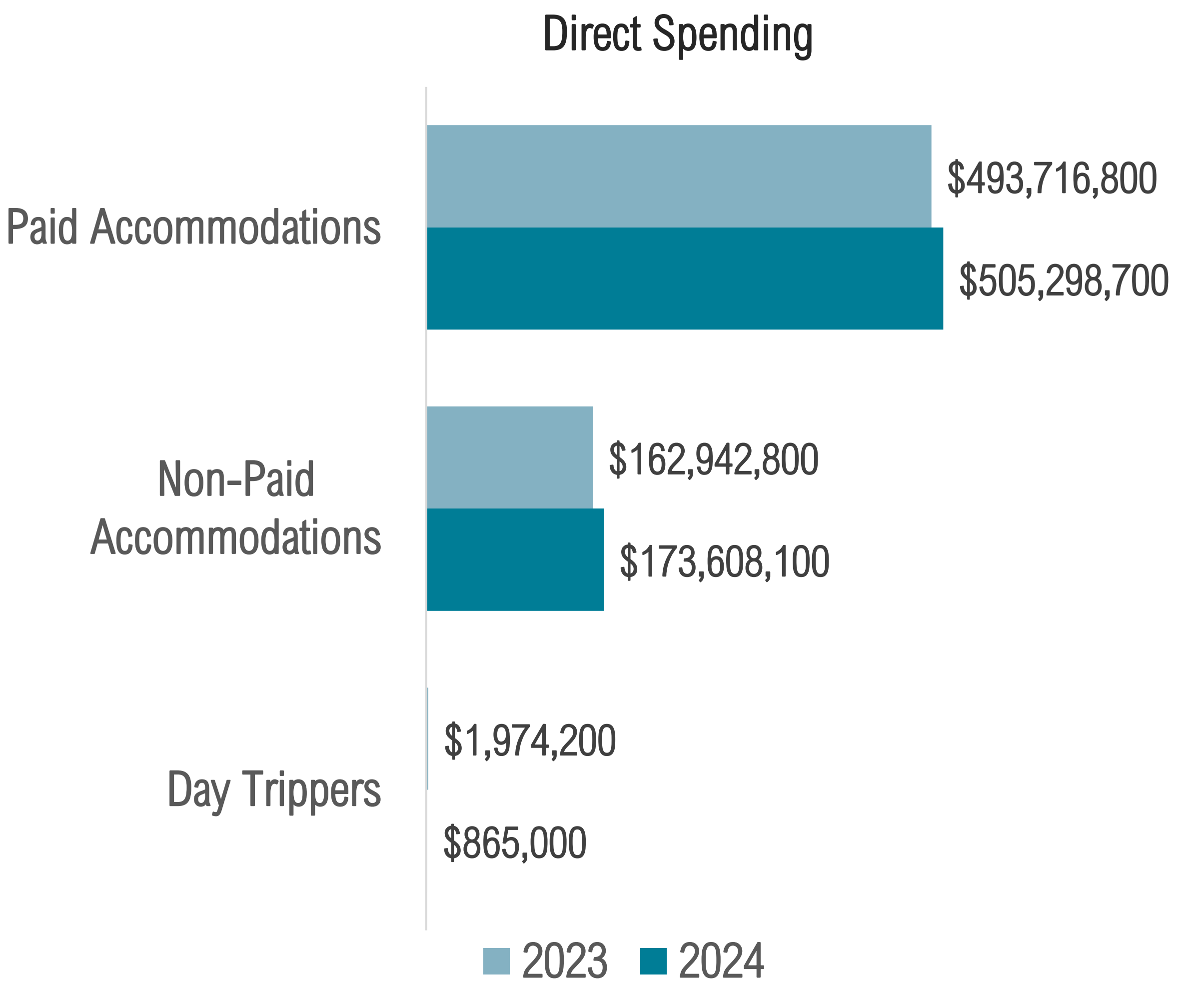
Visitors staying in paid accommodations accounted for 2 in 3 visitors.



VISITOR EXPENDITURES BY VISITOR TYPE

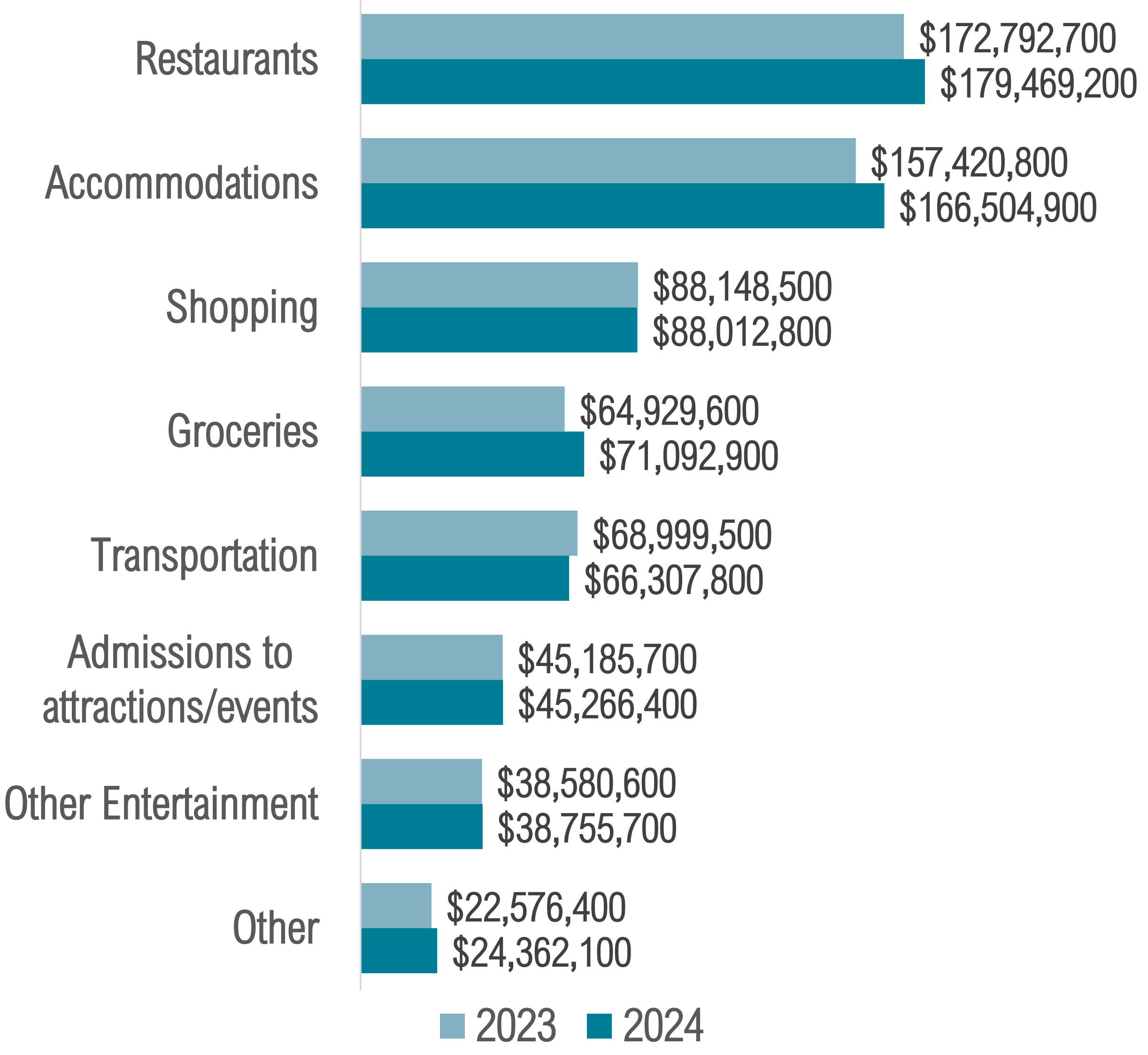
Oct - Dec visitors spent $679,771,800 in the Fort Myers area, resulting in a total economic impact of $1,082,876,500, up 2.7% from 2023.

Visitors staying in paid accommodations accounted for 67% of all visitors and 74% of all spending.



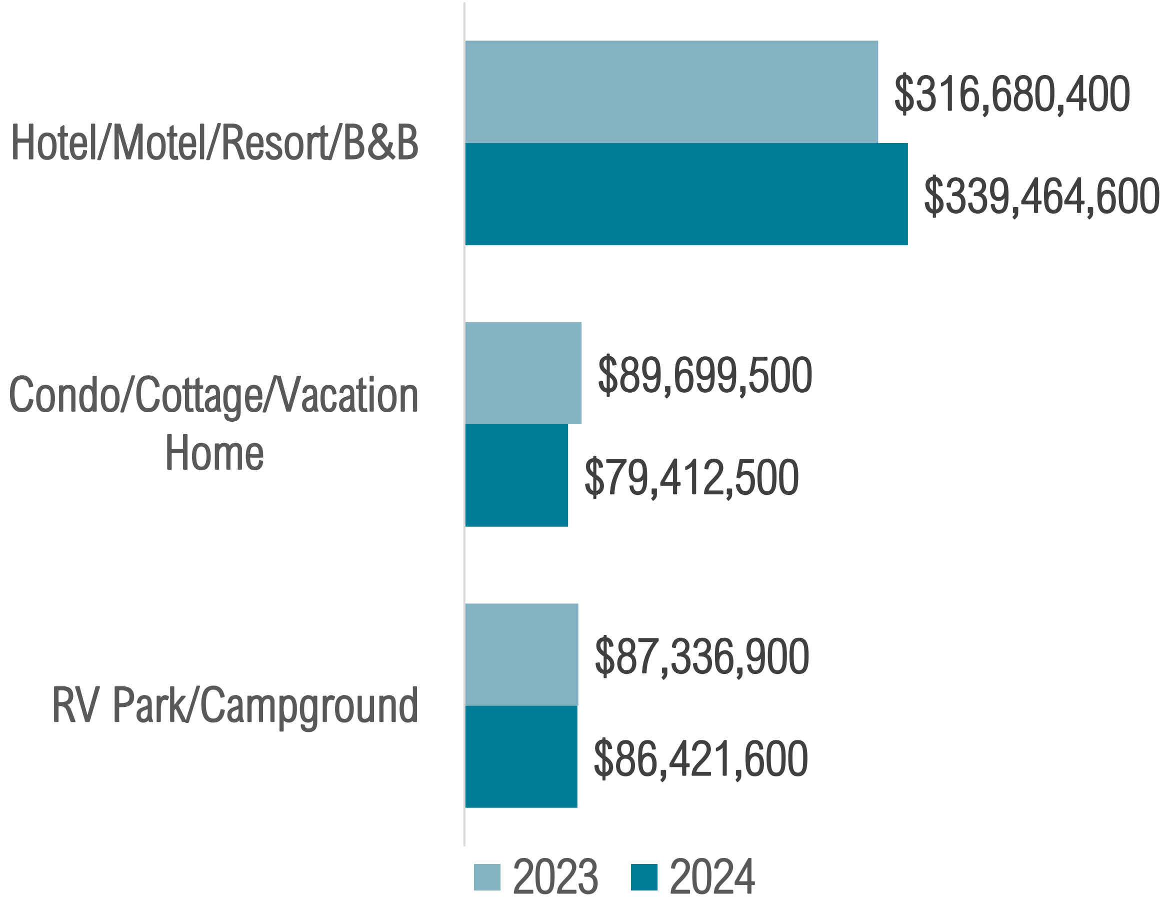
VISITOR EXPENDITURES BY SPENDING CATEGORY

Of the **$679,771,800** visitors spent in the Fort Myers area, 26% was spent on **restaurants** and 25% was spent on **accommodations**, accounting for **over half** of **all visitor spending**.



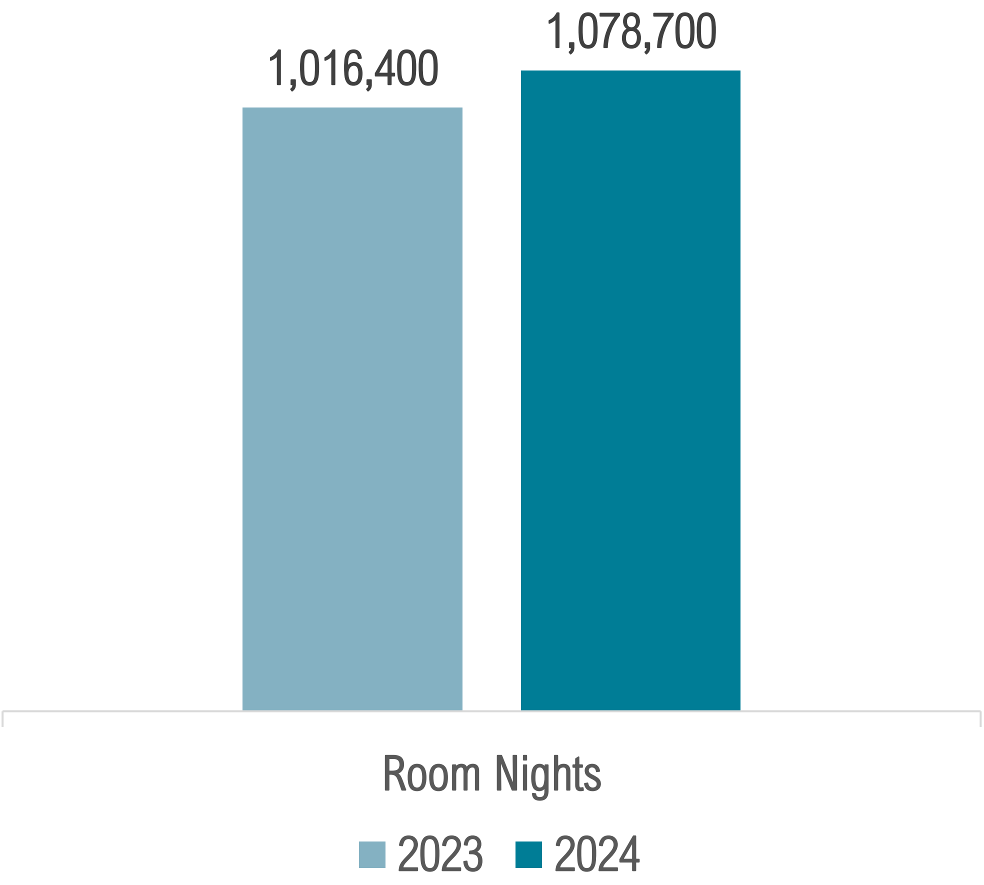
VISITOR EXPENDITURES BY LODGING TYPE

Oct - Dec visitors staying in paid accommodations spent $505,298,700 in the Fort Myers area.



ROOM NIGHTS GENERATED

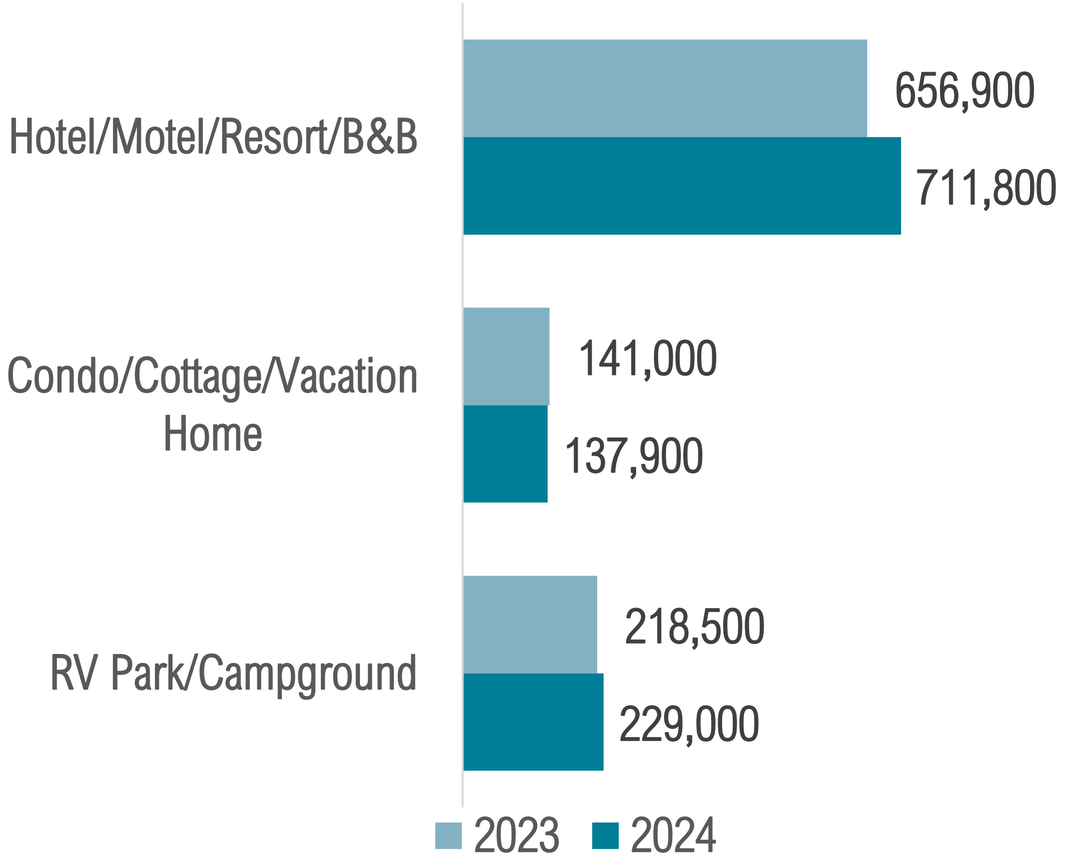
Oct - Dec visitors spent **1,078,700**[1] nights in Fort Myers area hotels, resorts, condos, rental houses, RV parks, etc. (+6.1% from 2023).



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

ROOM NIGHTS GENERATED

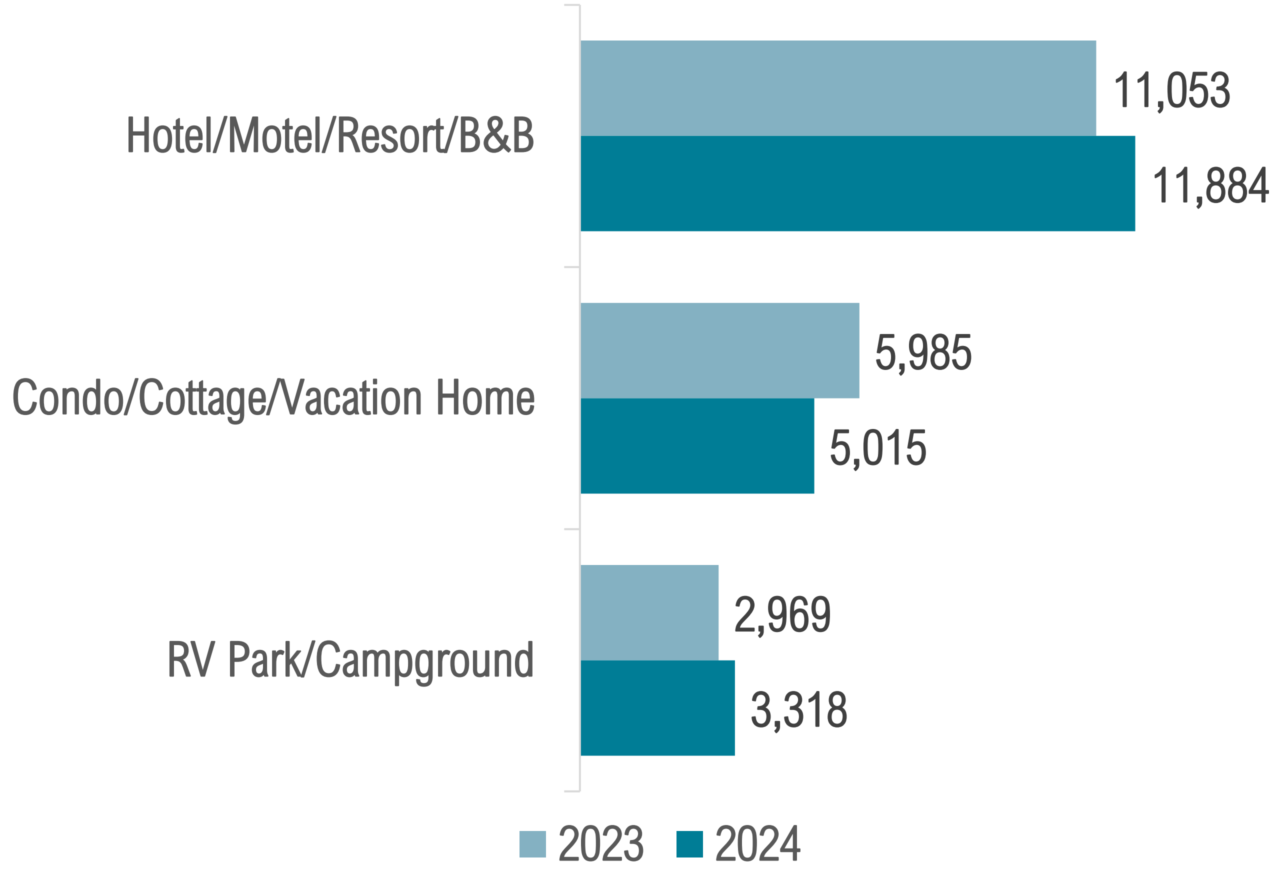
Hotels, motels, etc. accounted for 2 in 3 room nights spent in the Fort Myers area, while RV parks/campgrounds accounted for 21% and vacation rentals accounted for the remaining 13% of room nights that visitors spent in the area.



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

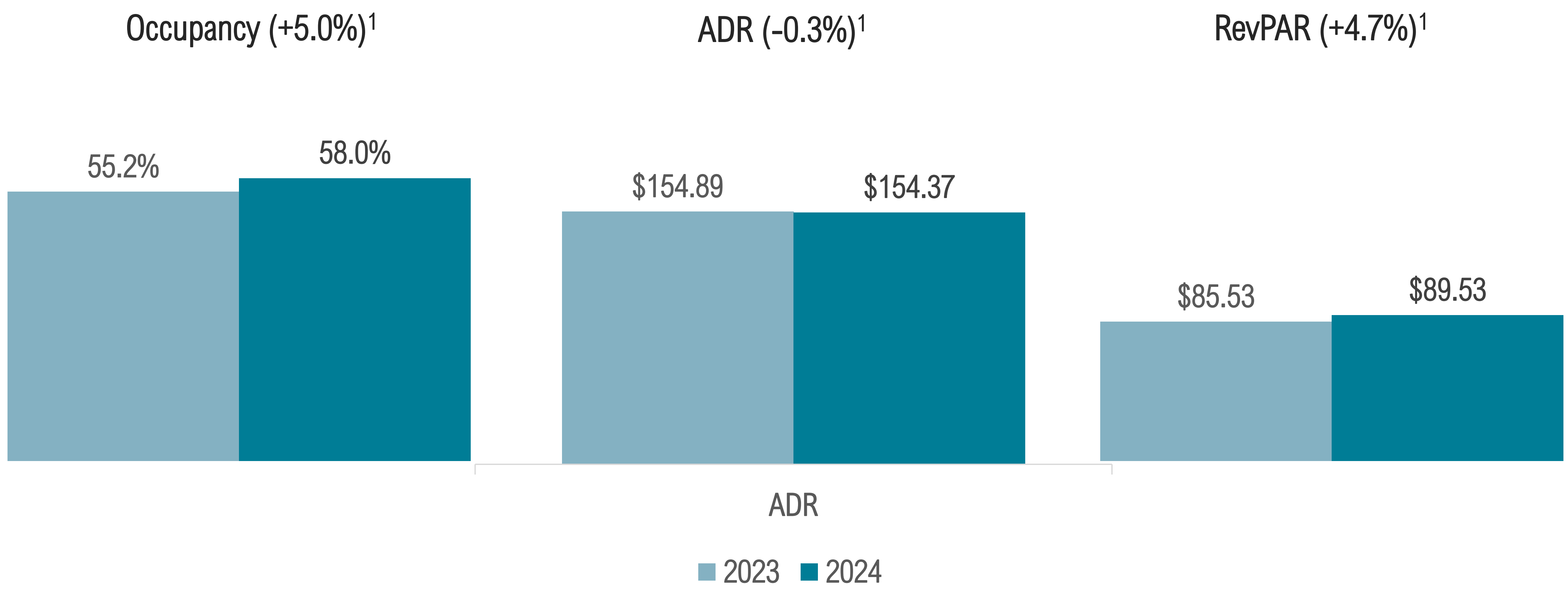
AVAILABLE UNITS

There were 20,217[1] available units in Oct - Dec 2024 vs. 20,007 in 2023 (+1.0%). Nearly 3 in 5 units available were from hotels, motels, etc.



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

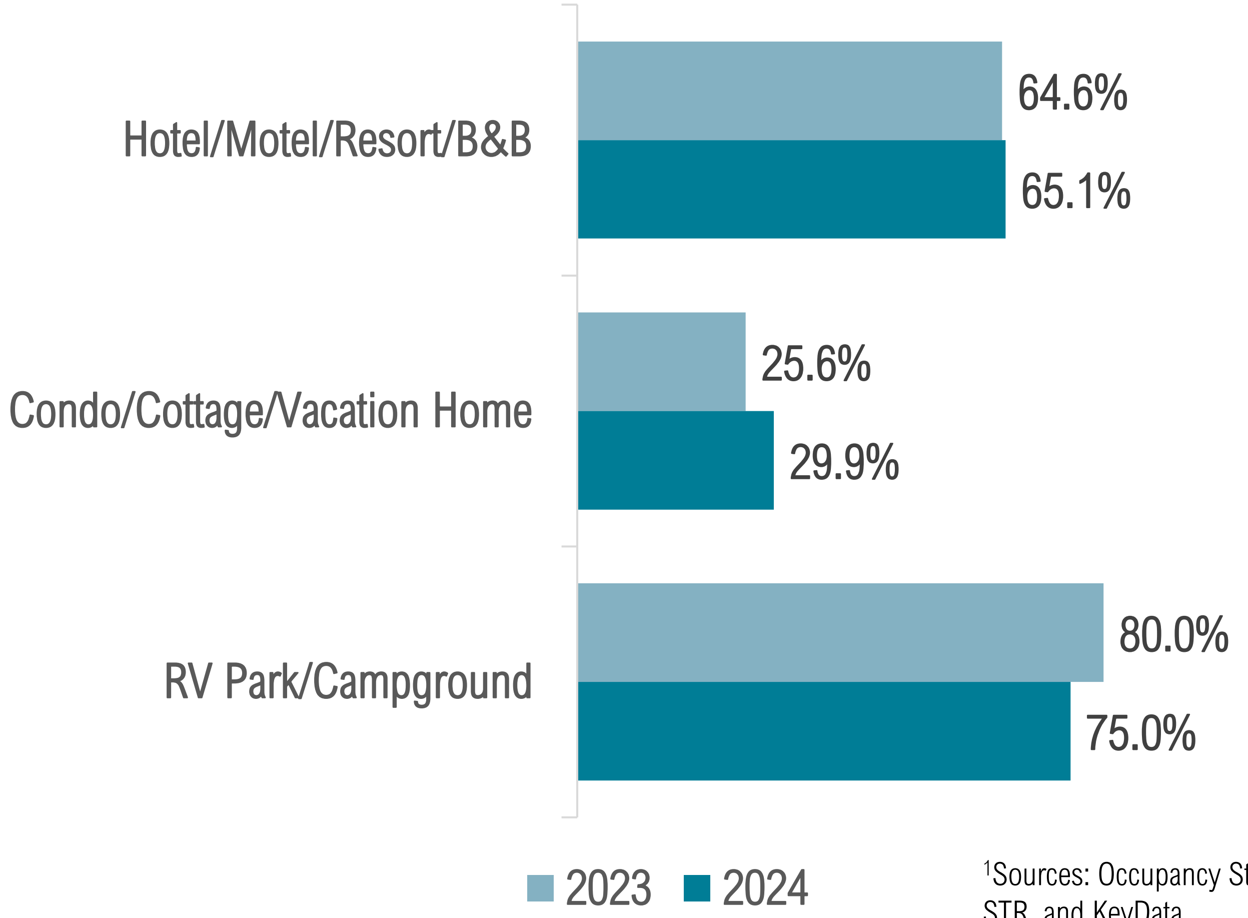
OCCUPANCY, ADR AND REVPAR



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

OCCUPANCY

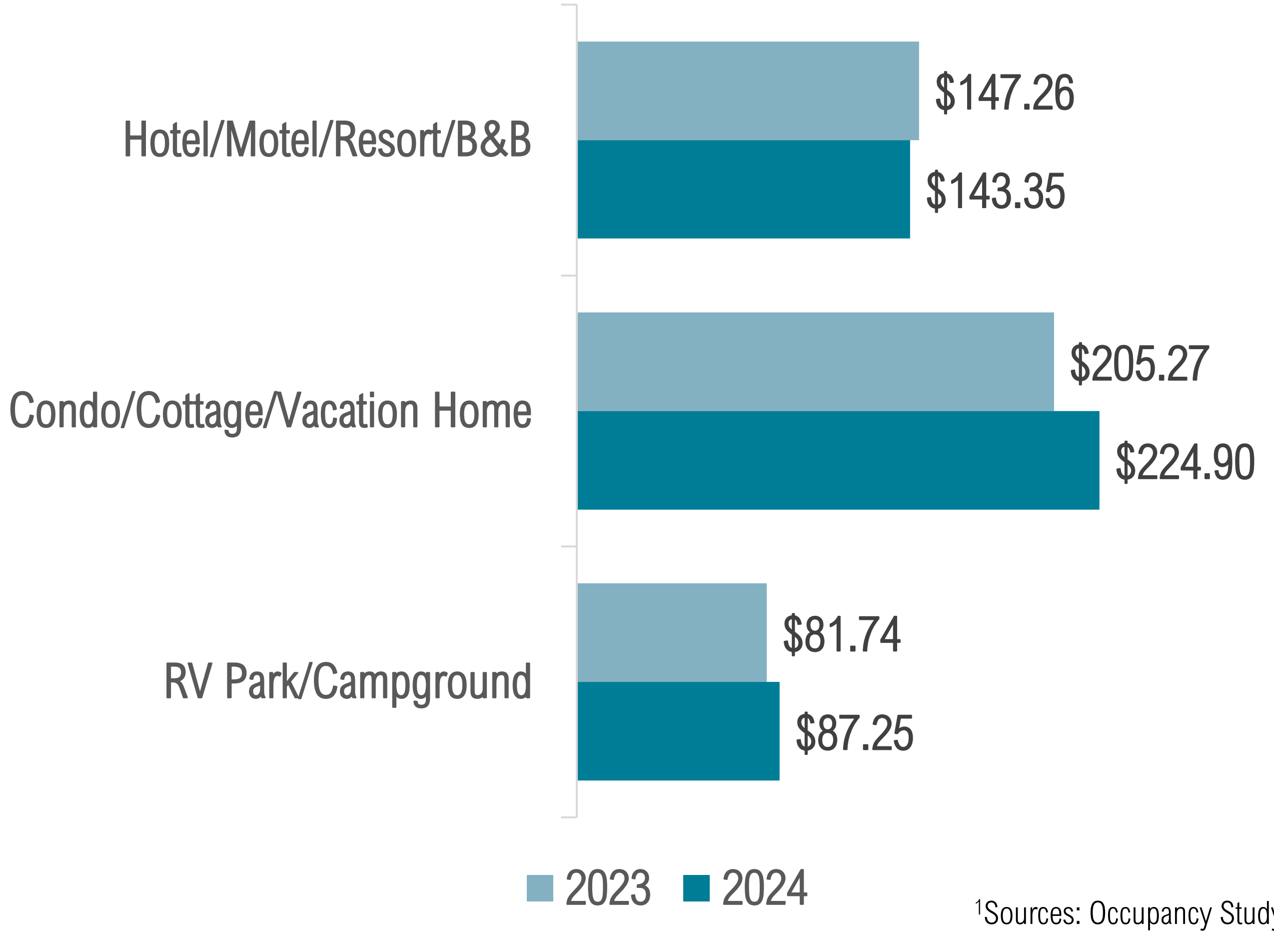
Average occupancy in October-December was 58.0%[1] (55.2% in 2023).



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

ADR

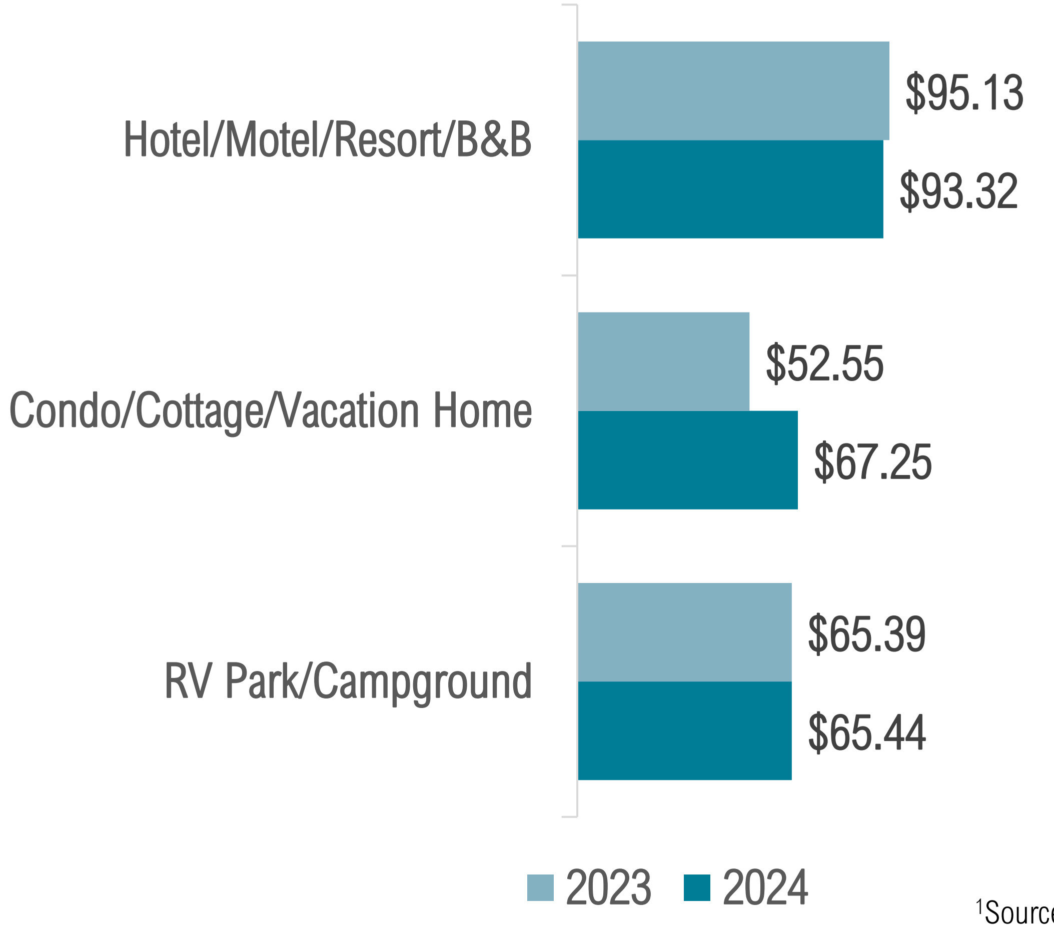
ADR in October-December was $154.37[1] ($154.89 in 2023).



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

REVPAR

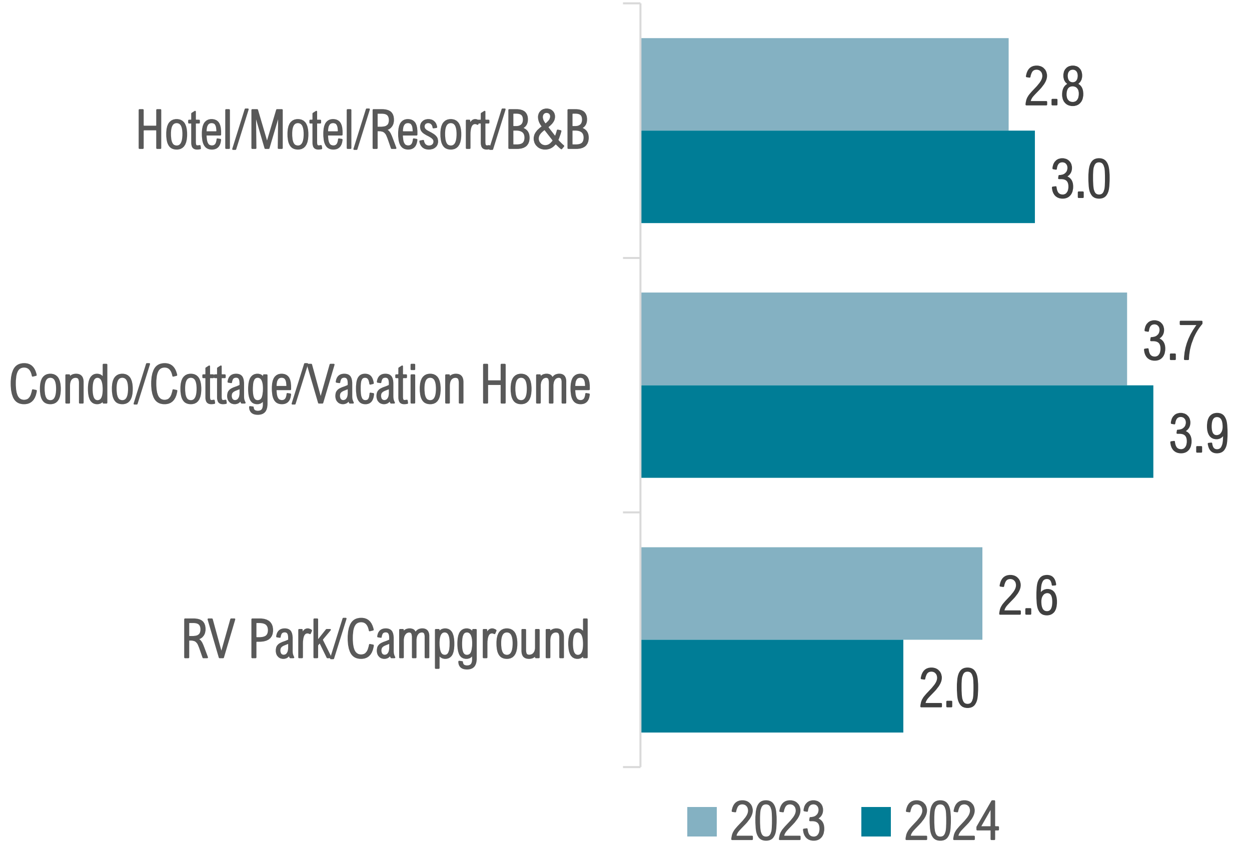
Average RevPAR in October-December was **$89.53**[1] ($85.53 in 2023).



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

TRAVEL PARTY SIZE

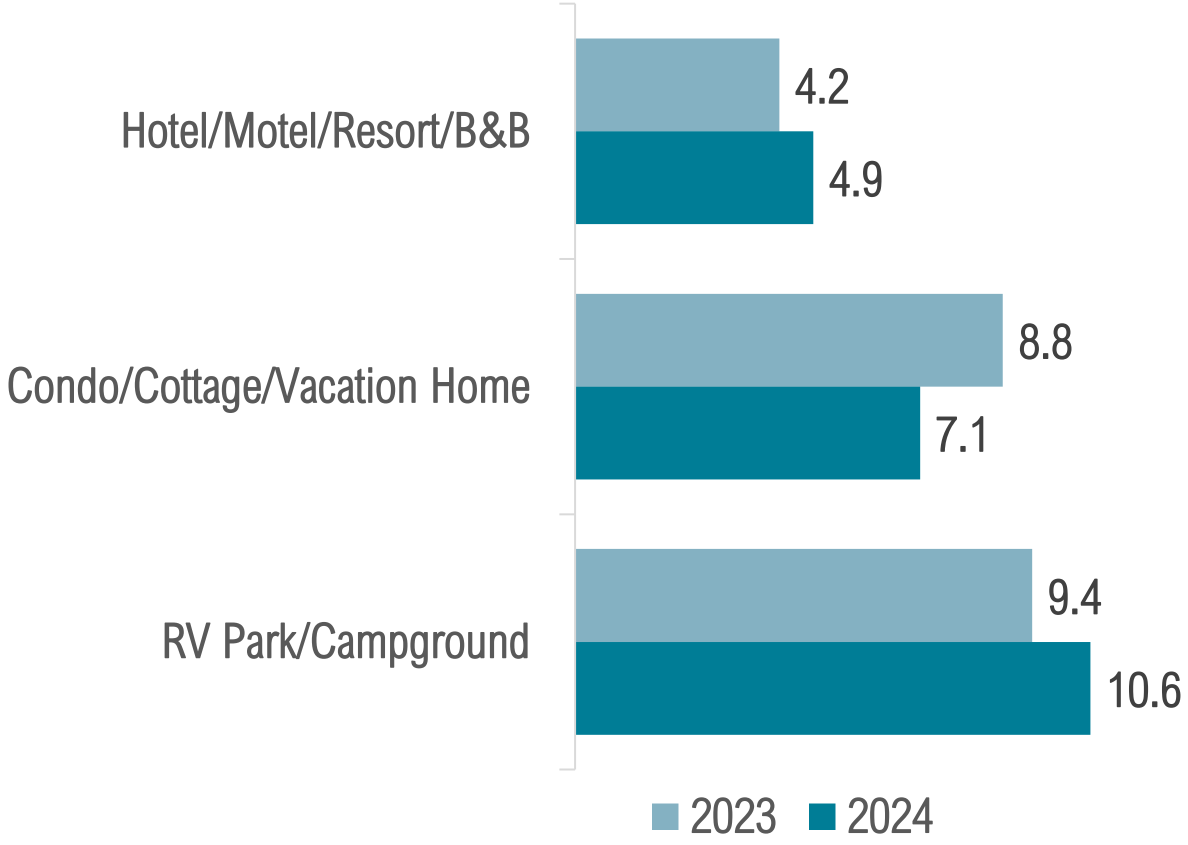
For visitors in paid accommodations, average travel party size in October-December was **3.0 people**[1] (2.9 people in 2023).



[1]Source: Visitor Tracking Study, Occupancy Study, & KeyData

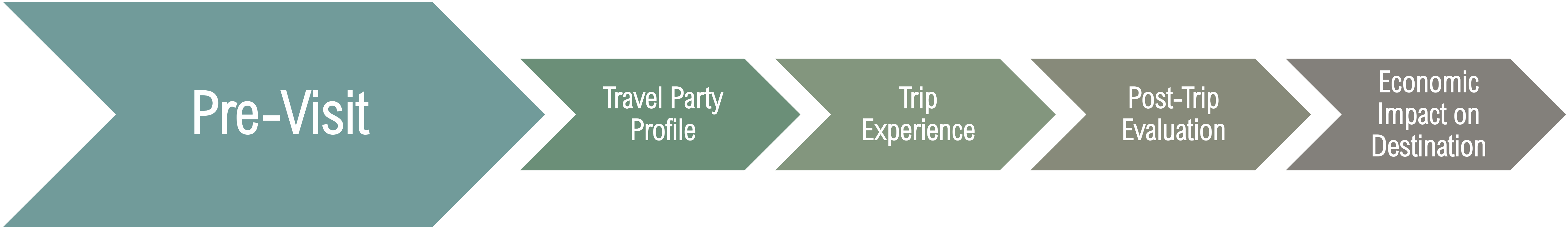
LENGTH OF STAY

For visitors in paid accommodations, average length of stay in October-December was **5.6 nights**[1] (5.3 nights in 2023).



[1]Source: Visitor Tracking Study, Occupancy Study, & KeyData

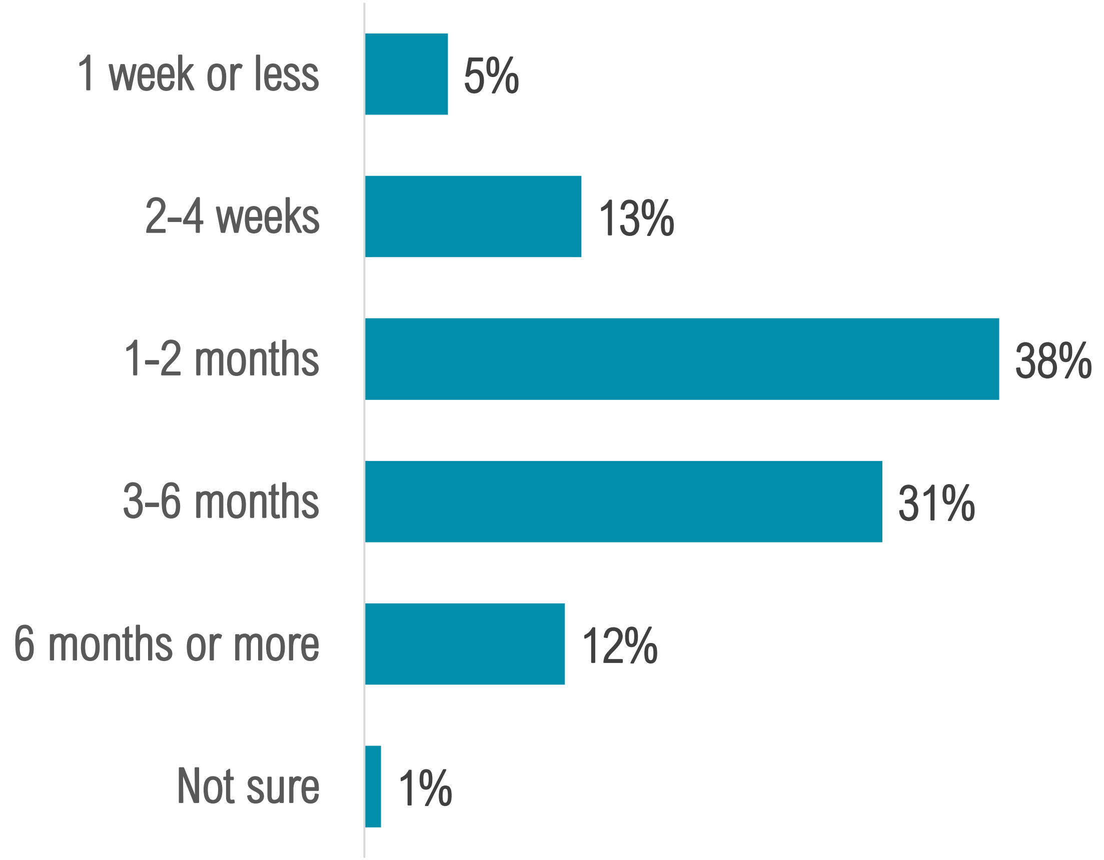
Visitor Journey: Pre-Visit



TRIP PLANNING CYCLE

Nearly 2 in 5 visitors planned their trip 1-2 months in advance, while over 3 in 10 visitors planned their trip 3-6 months in advance.

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

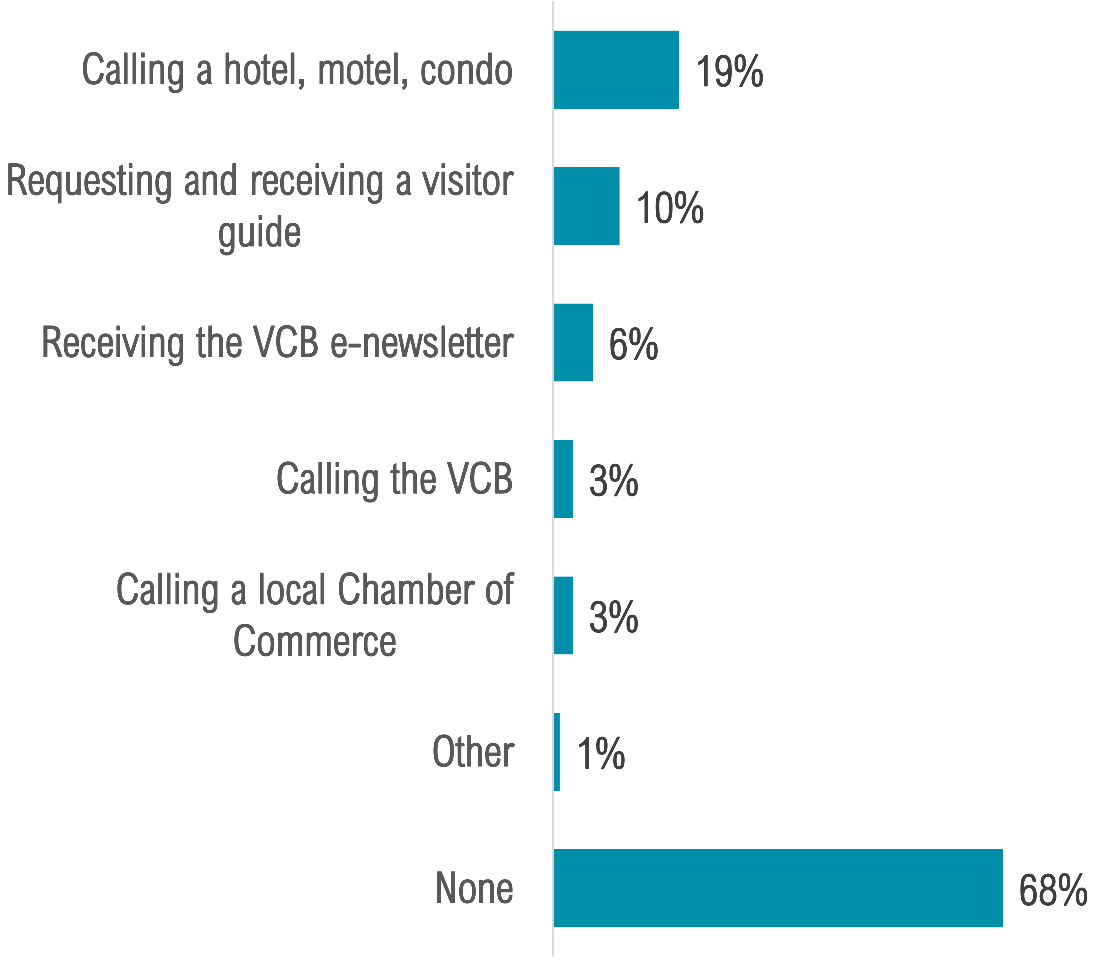


TRIP PLANNING: INFORMATION REQUESTS[1]

Nearly 1 in 3 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 Q4 2024 was 2% higher than in Q4 2023.



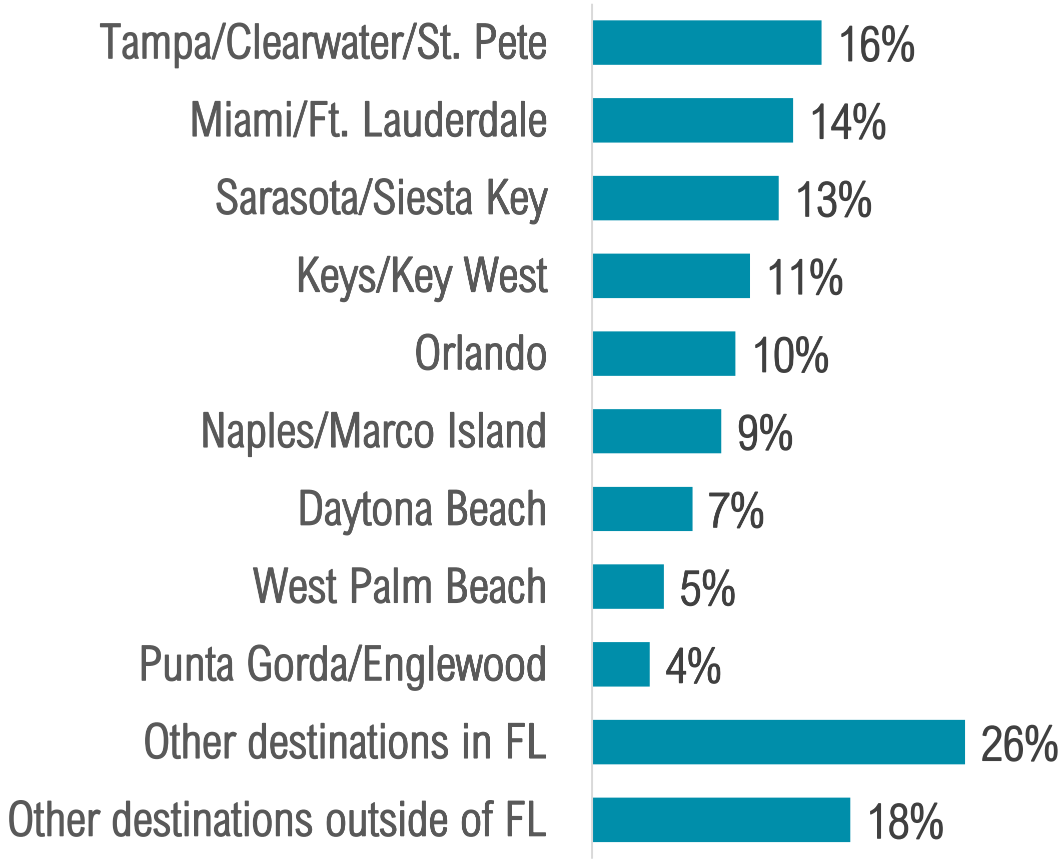
[1]Multiple responses permitted.

TRIP PLANNING: OTHER DESTINATIONS CONSIDERED[1]

Most alternate destinations considered were in **Florida**.

Nearly 1 in 6 visitors considered visiting the Tampa/Clearwater/St. Pete area.

BASE: 24% of visitors who considered other destinations



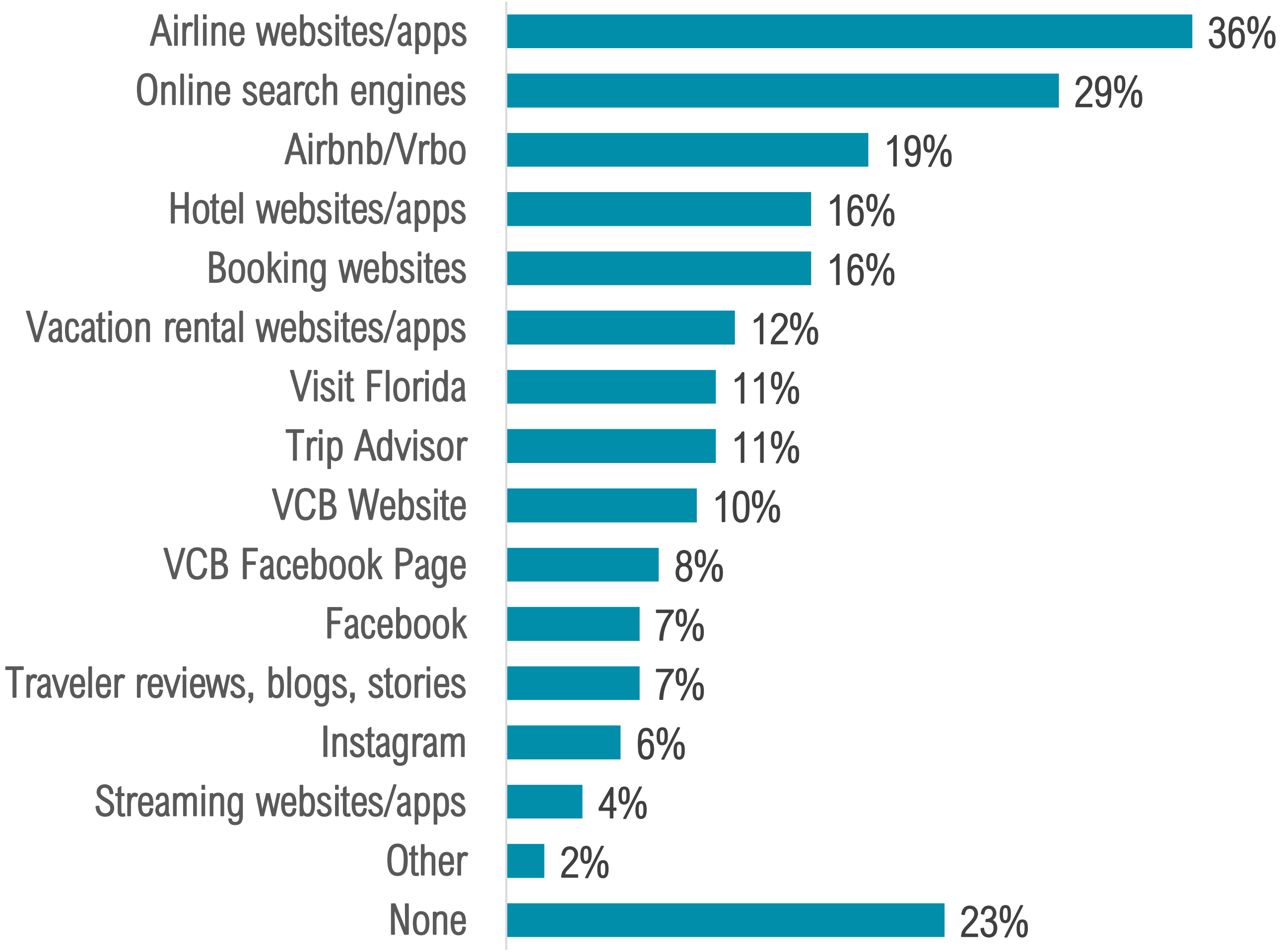
[1]Multiple responses permitted.

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 (19%), hotel websites/apps (16%),** and **booking websites (16%)** to plan their trips.

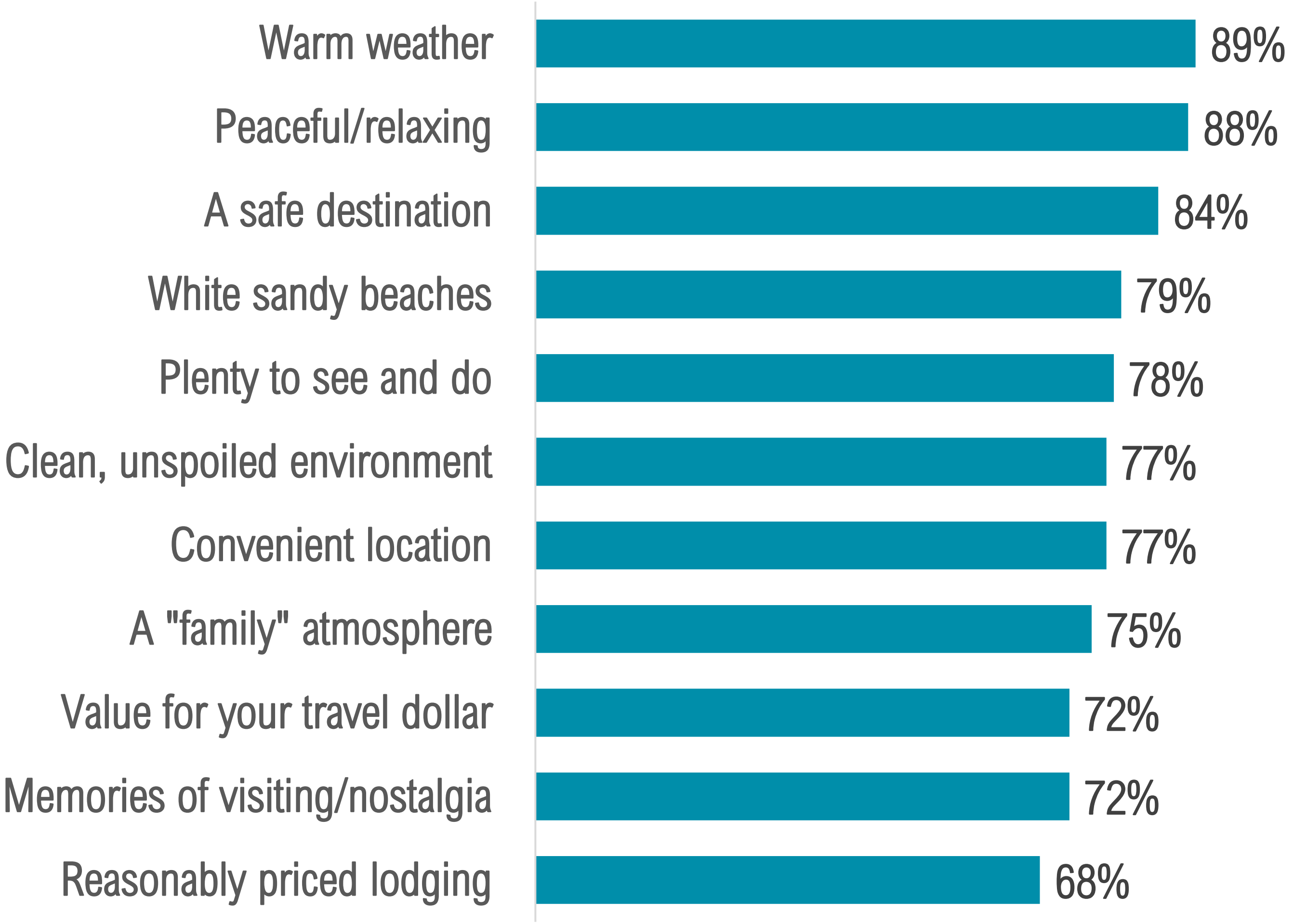


[1]Multiple responses permitted.

TRIP INFLUENCERS[1]

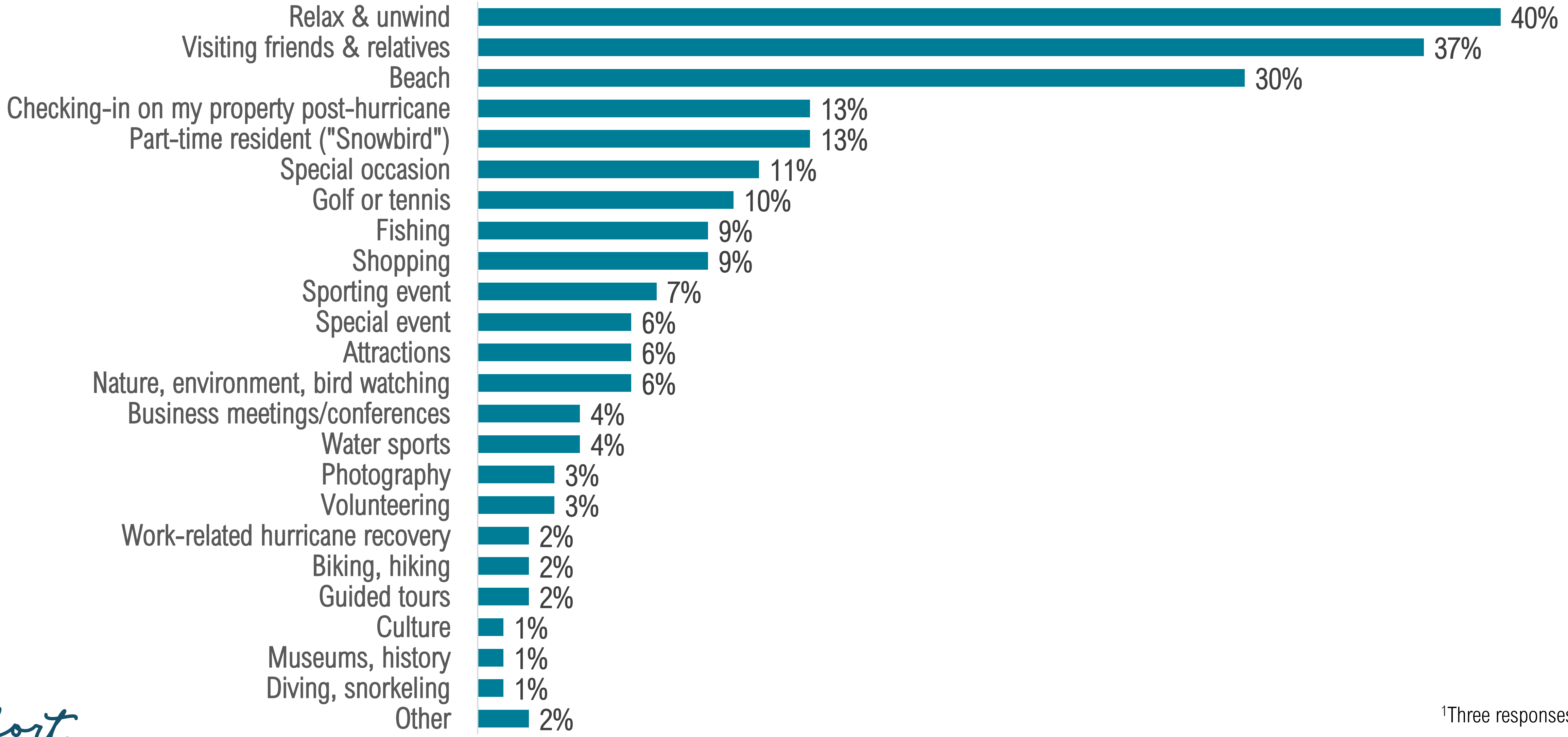
Visitors were heavily influenced by the **warm weather, peacefulness, and safety** of the Fort Myers area when thinking about visiting.

Most trip influencing factors saw slight year-over-year increases in their top two box scores, with **reasonably priced lodging** increasing the most (+6%).



[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.

Pre-Visit
Oct - Dec 2024

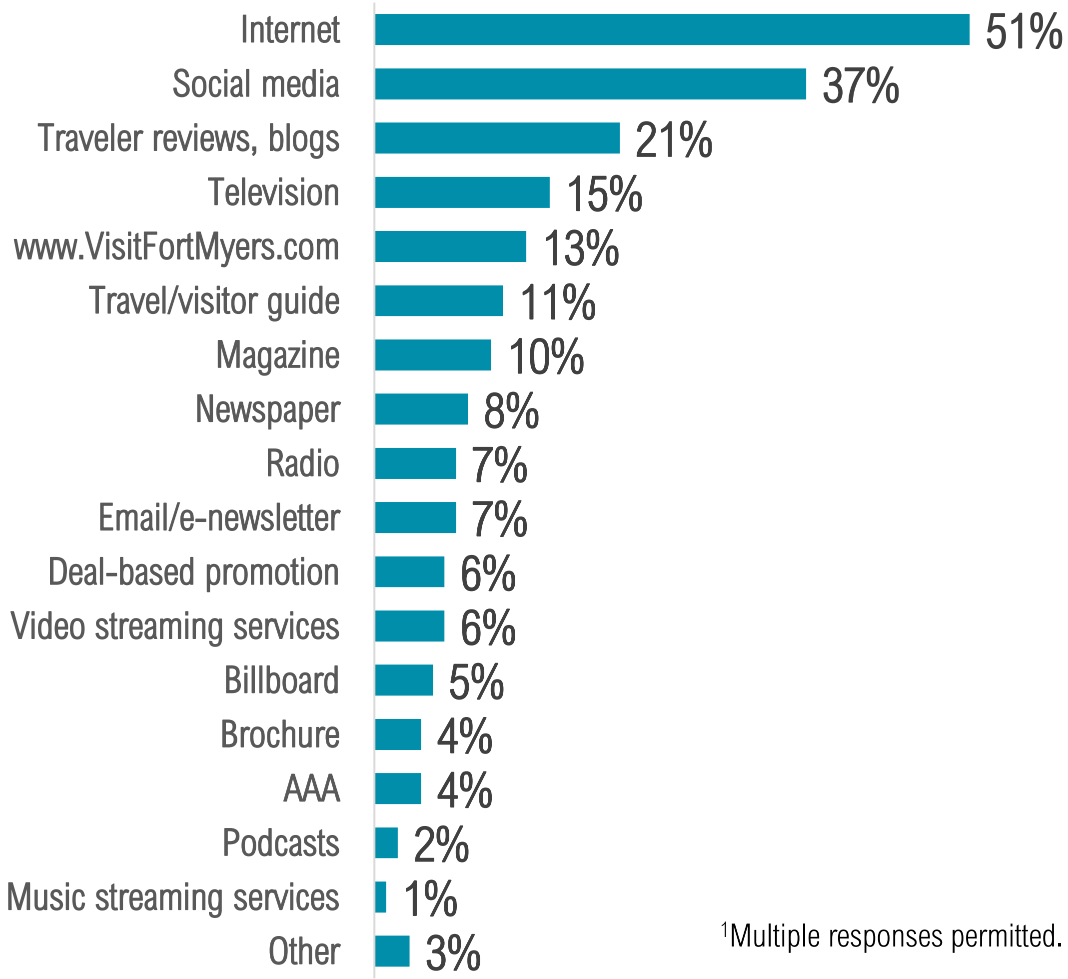
PROMOTIONS RECALL[1]

35% of visitors **recalled promotions** in the past 6 months for the Fort Myers area.

These sources influenced 20% of all visitors to come to the Fort Myers area.

BASE: 35% of visitors who recalled promotions

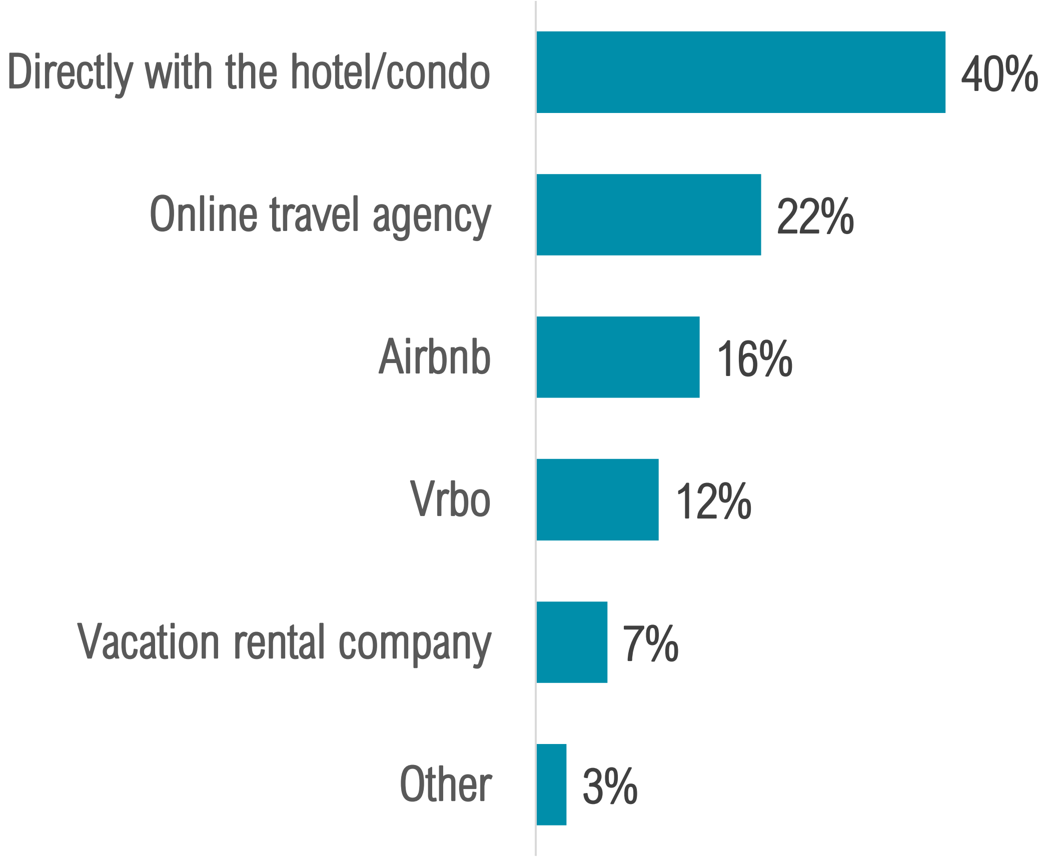
Sources of Promotion



[1]Multiple responses permitted.

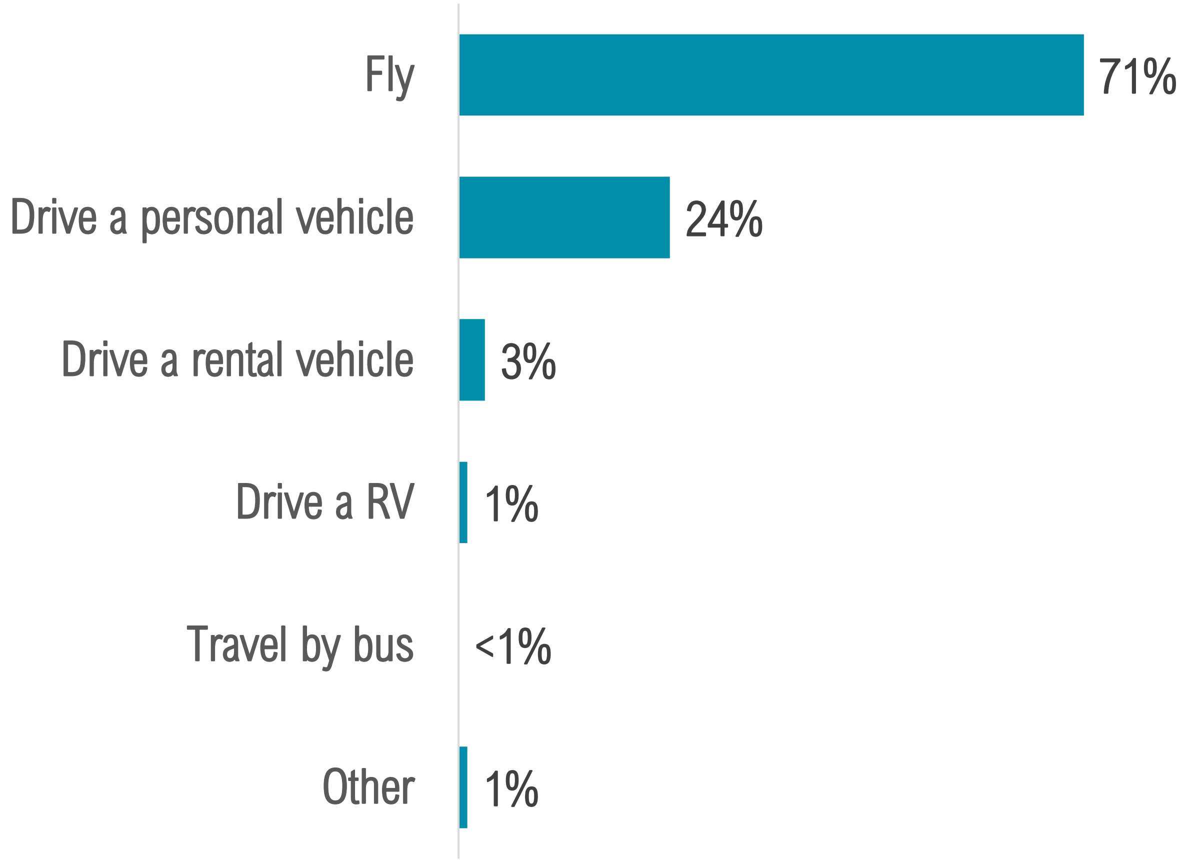
BOOKING

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



TRANSPORTATION

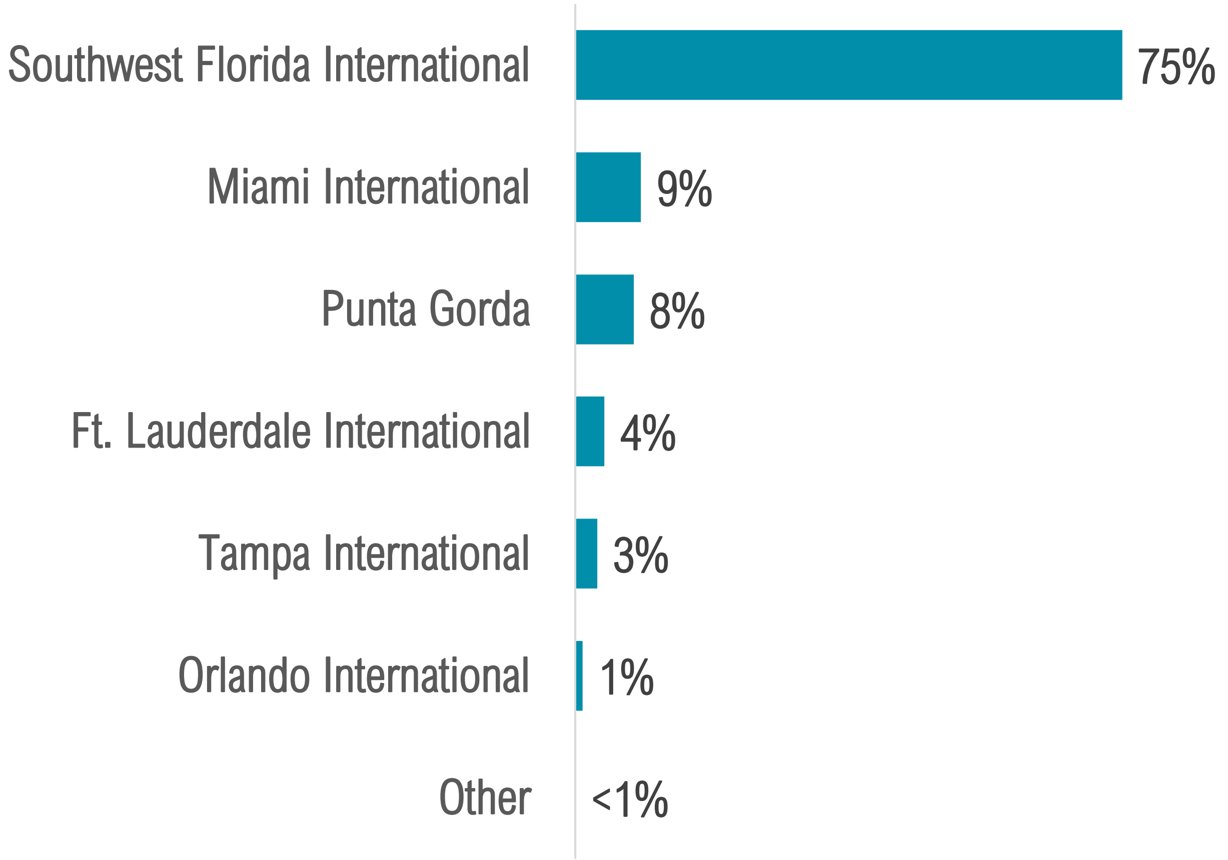
Over 7 in 10 visitors flew to the Fort Myers area.



AIRPORT

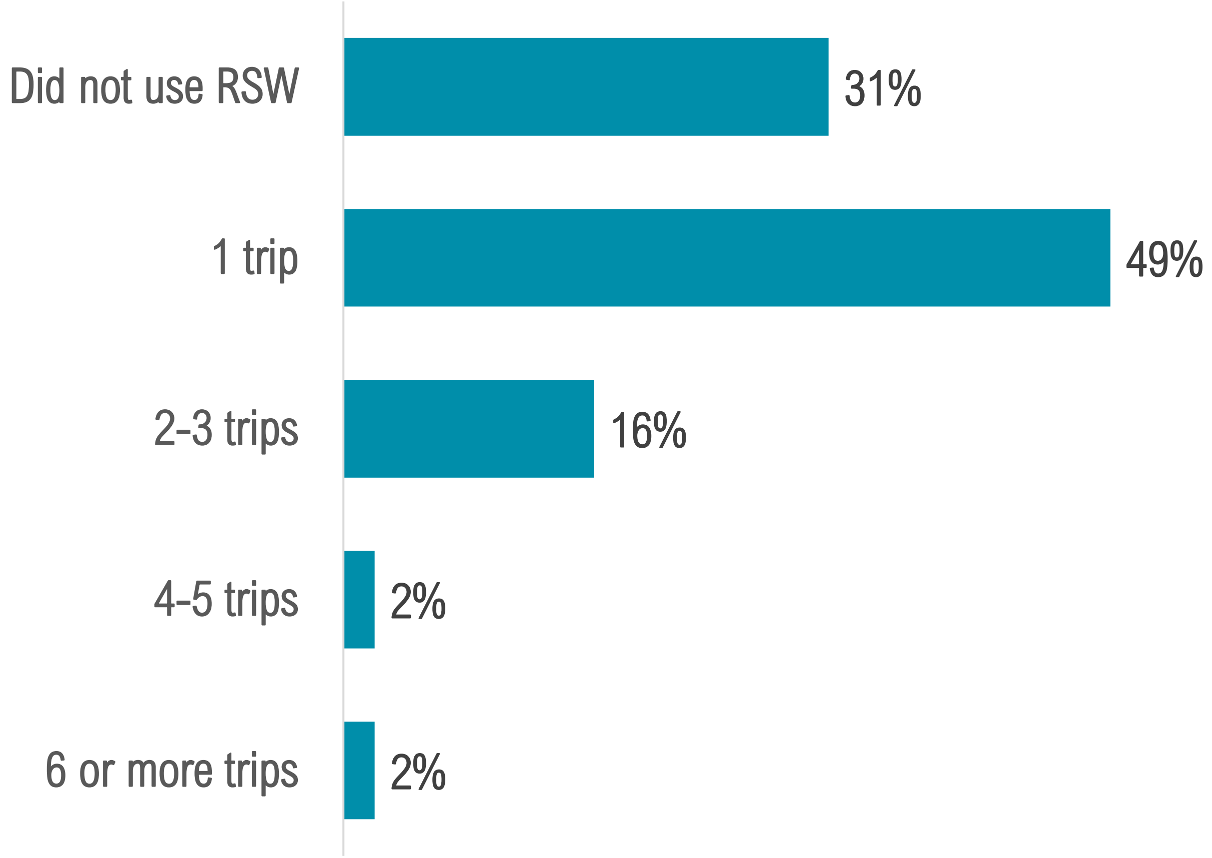
3 in 4 visitors who flew to the Fort Myers area came through RSW.

BASE: 71% of visitors who flew



USE OF RSW IN THE PAST YEAR

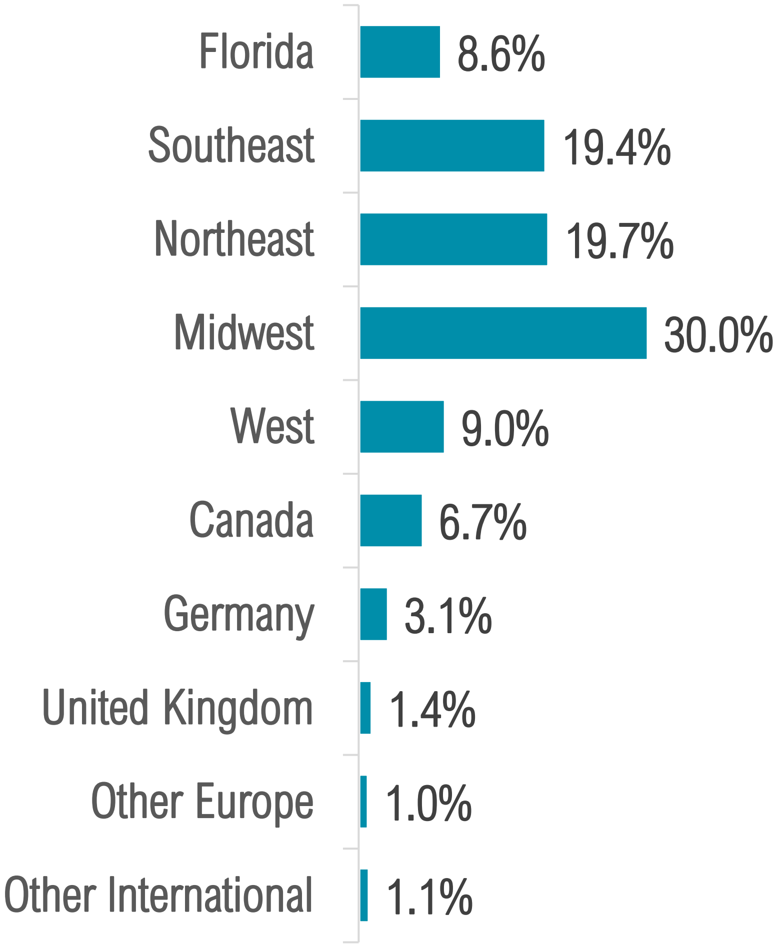
69% of visitors who flew into RSW had used RSW **at least once** in the past year (besides current trip).

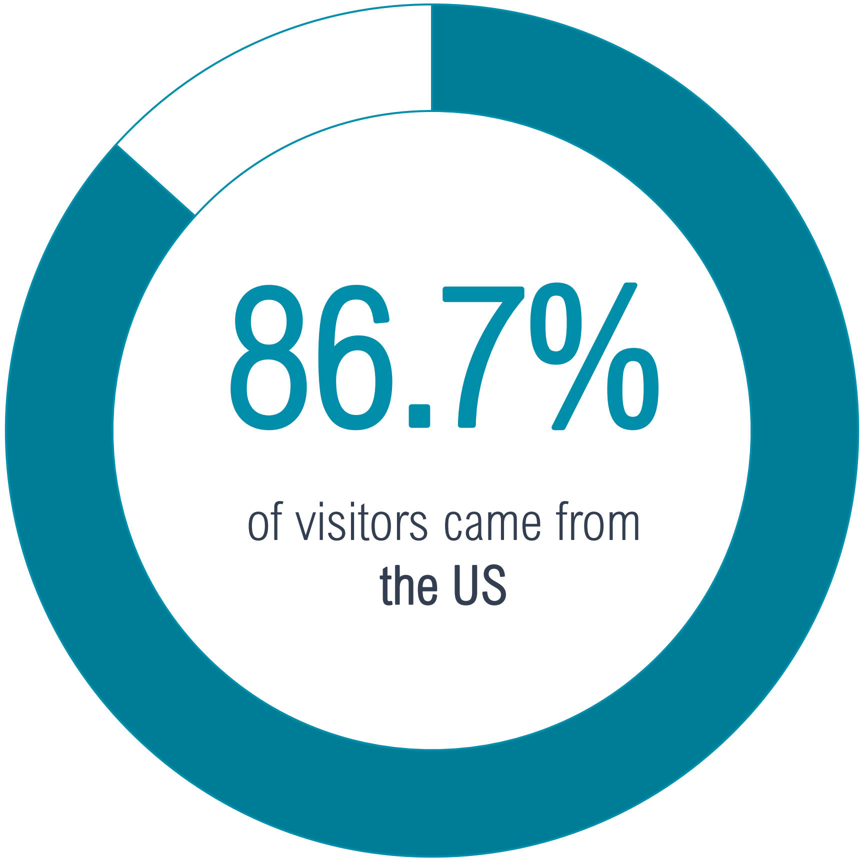


VISITOR JOURNEY: TRAVEL PARTY PROFILE

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

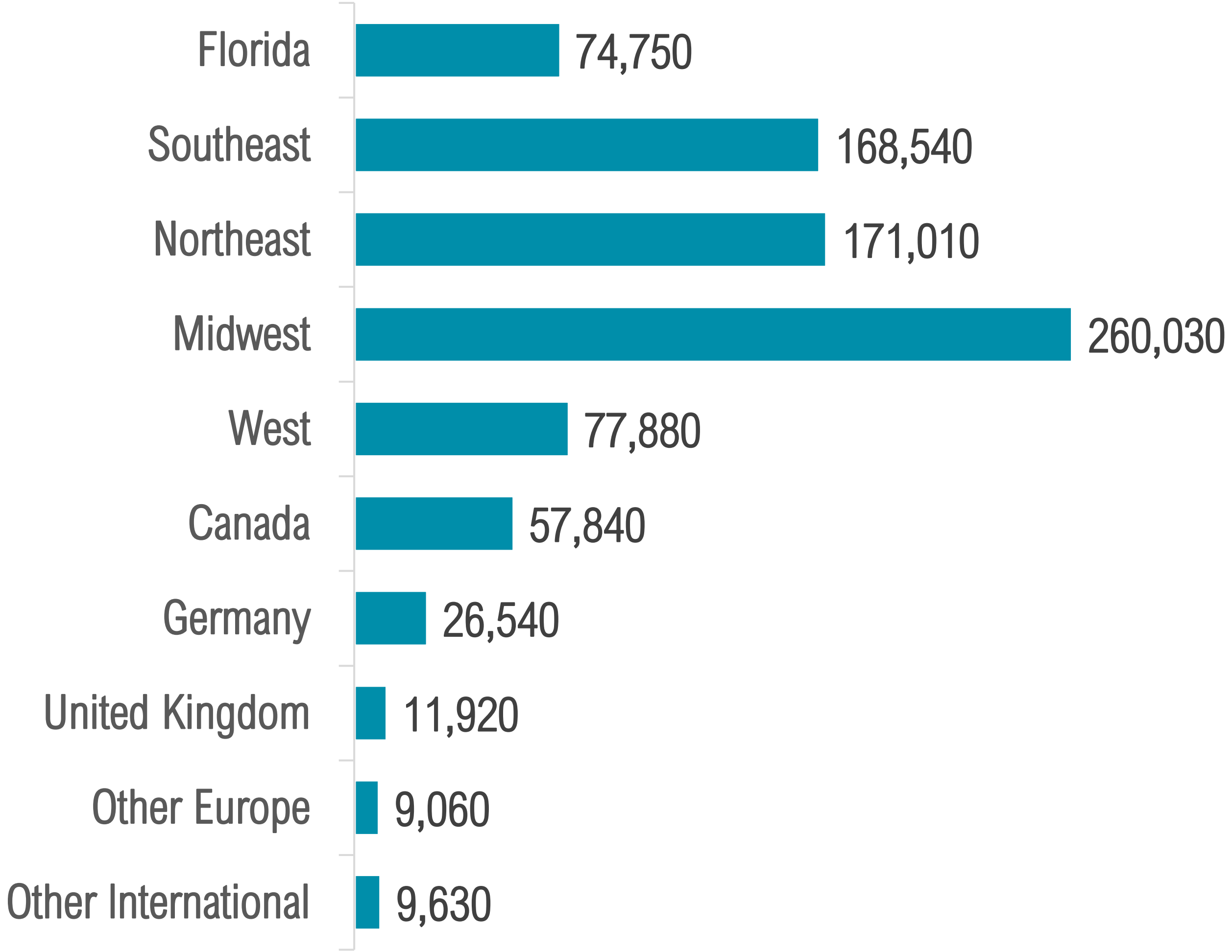
ORIGIN[1]





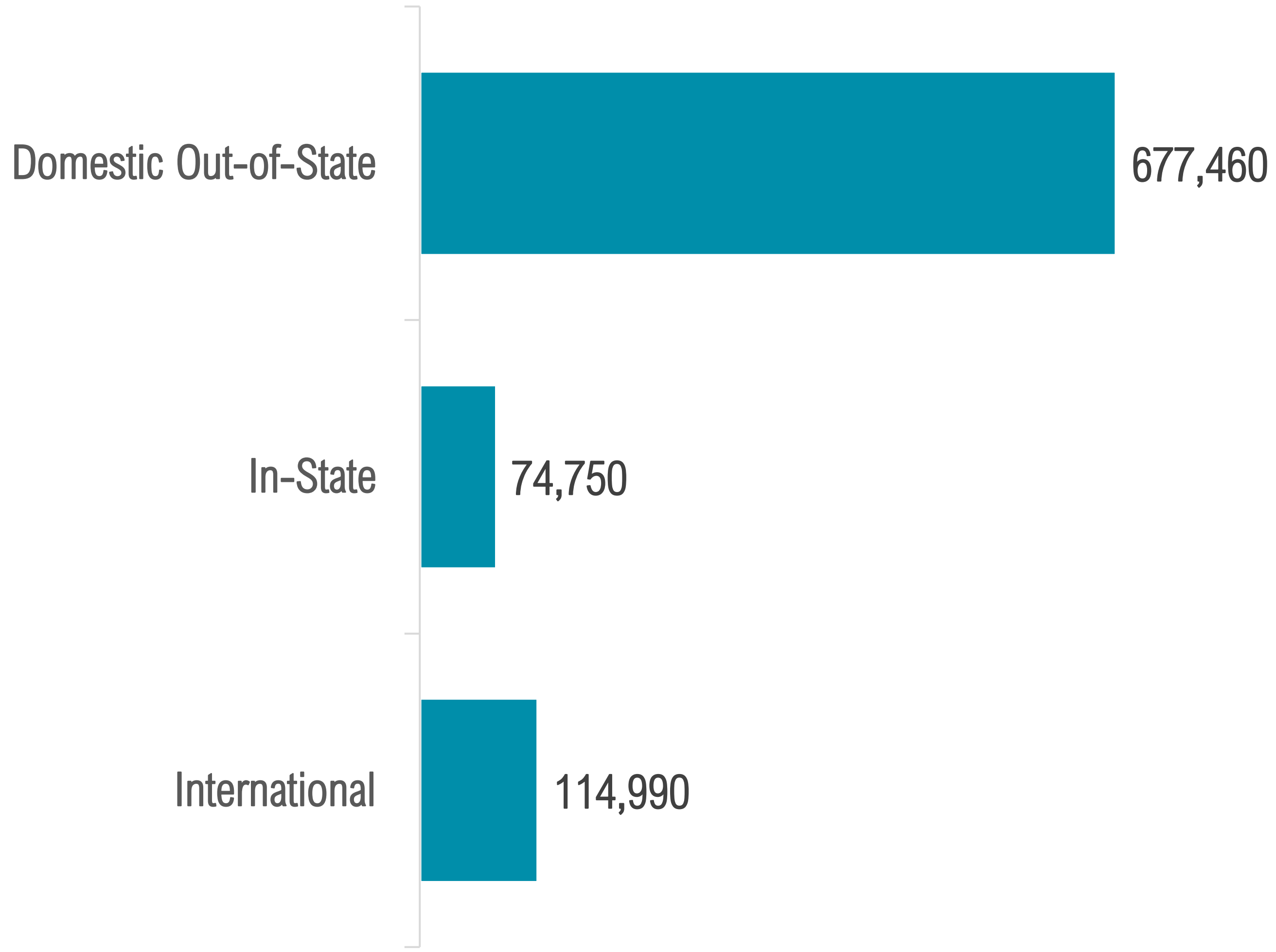
[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers.
Based on data from the Visitor Tracking Study.

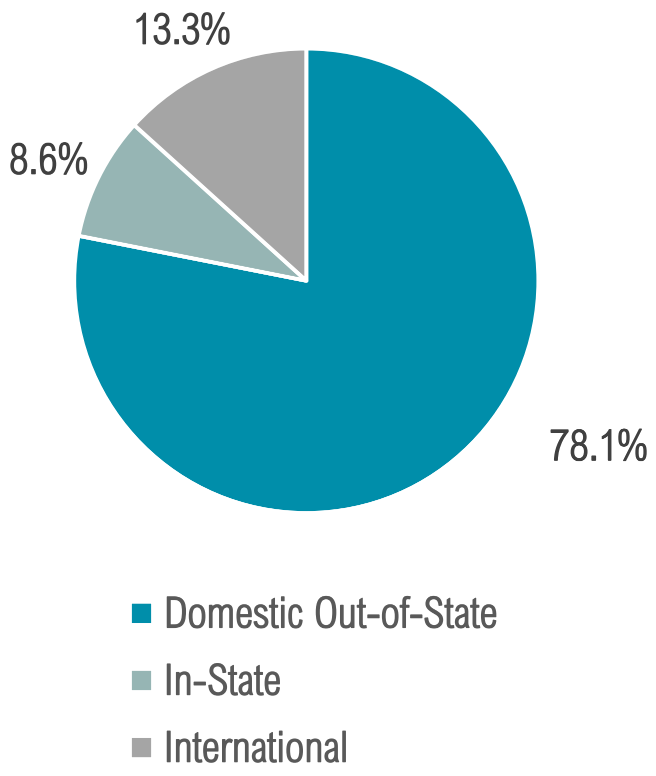
NUMBER OF VISITORS BY ORIGIN[1]



[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
Chicago	6%
New York	5%
Atlanta	5%
Detroit	3%
Philadelphia	3%
Minneapolis-St. Paul	3%
Boston	3%
Washington, DC-Hagerstown	3%
Miami-Ft. Lauderdale	3%
Denver	3%
West Palm Beach-Ft. Pierce	2%
Cleveland-Akron	2%
Los Angeles	2%
Charlotte	2%
Pittsburgh	2%

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

fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

downs & st. germain RESEARCH

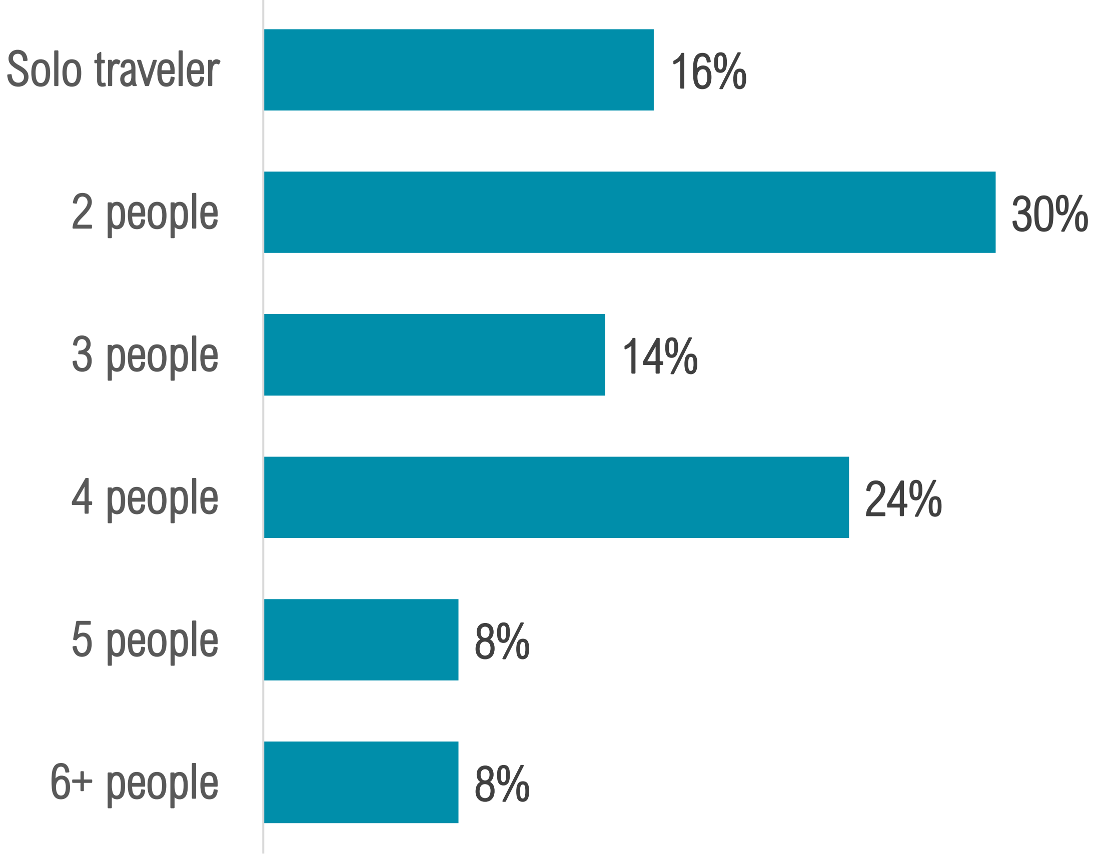
TRAVEL PARTY SIZE AND COMPOSITION

Travel Party Size

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

Travel with Children

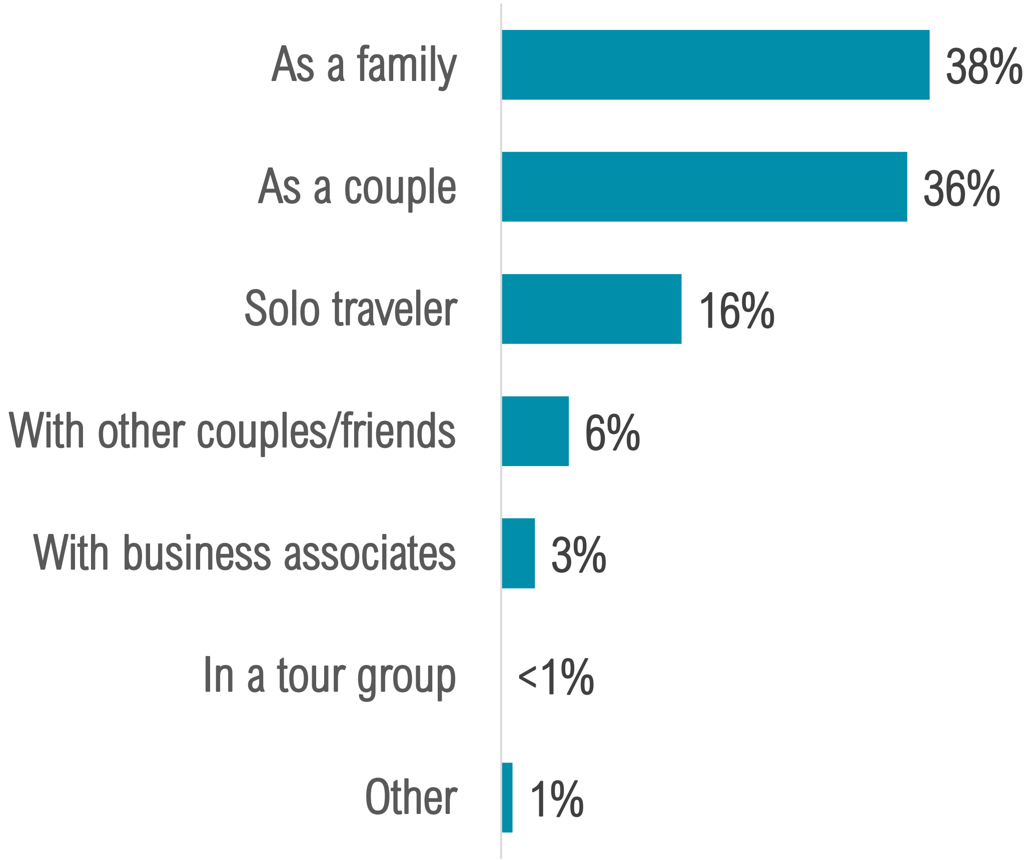
36% of visitors **traveled with children** under the age of 18.



[1]Sources: Occupancy Study and Visitor Tracking Study

TRAVEL PARTY TYPE

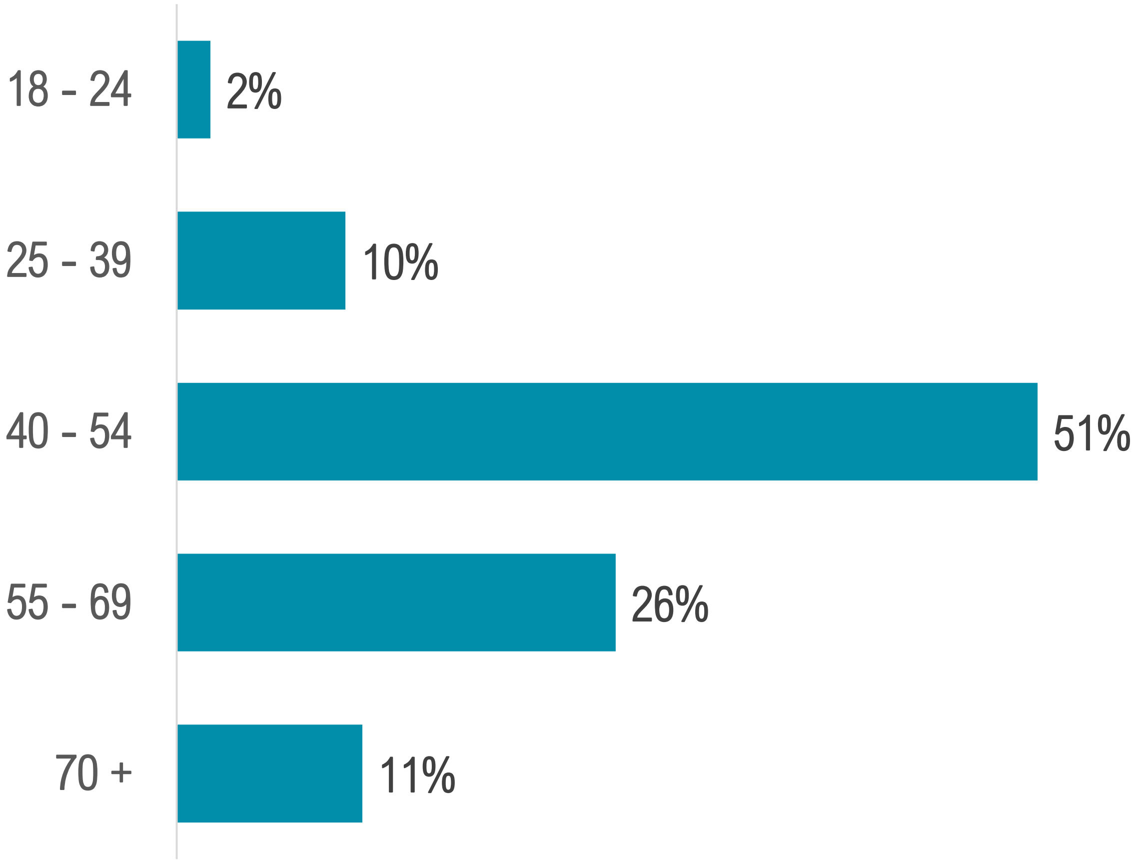
Nearly 3 in 4 visitors traveled either as a family or as a couple, while 16% of visitors traveled alone.



AGE

Average Age
The average age of Oct - Dec visitors was **51 years old.**

Median Age
The median age of Oct - Dec visitors was **51 years old.**

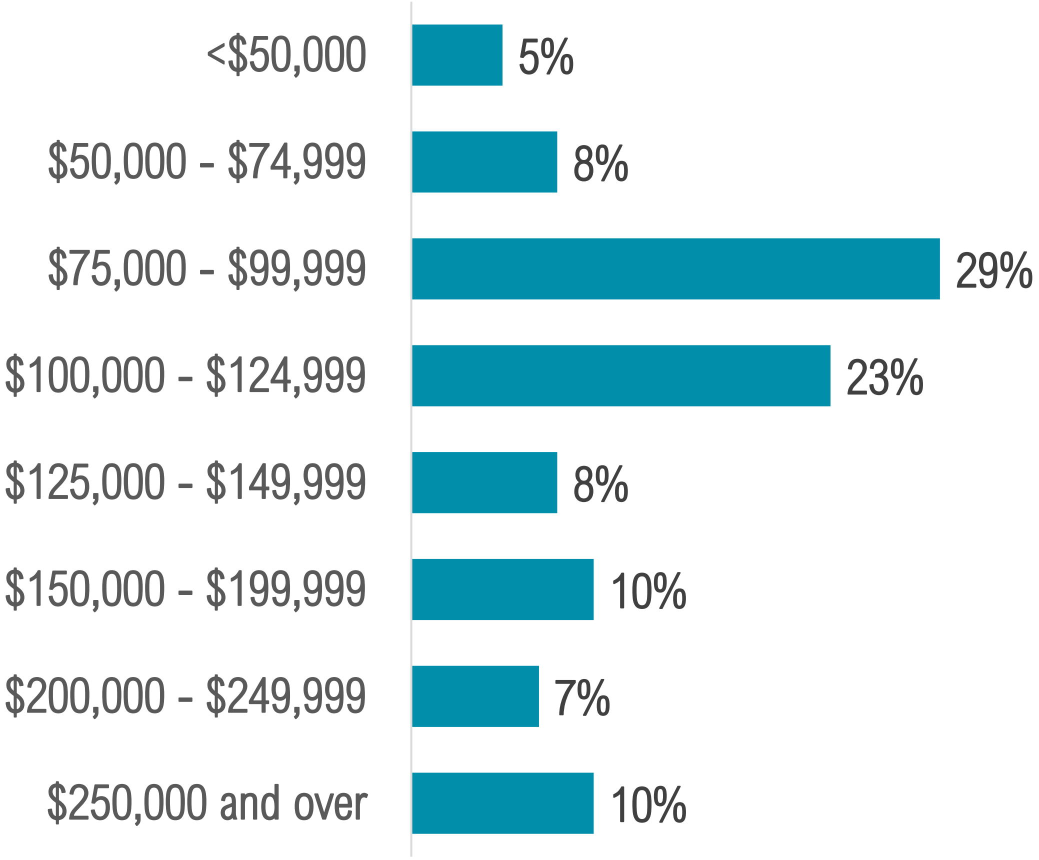


HOUSEHOLD INCOME

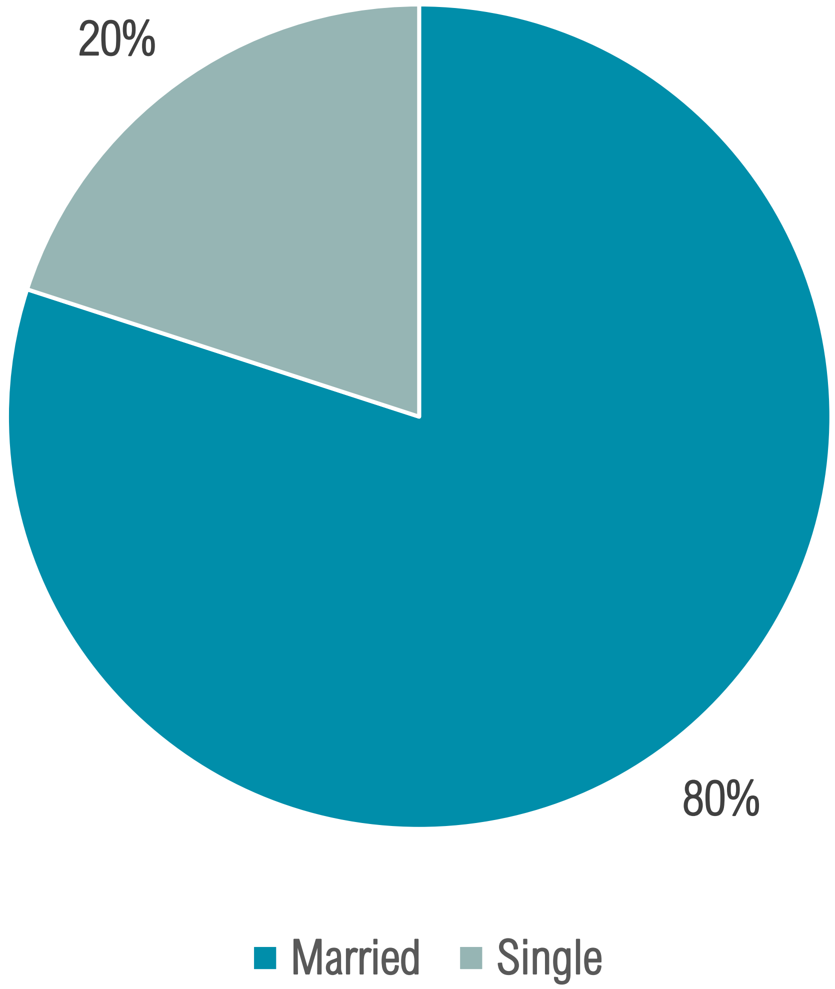
Median Household Income

Oct - Dec visitors had a median household income of **$108,700.**

17% of visitors had a household income in excess of **$200,000.**



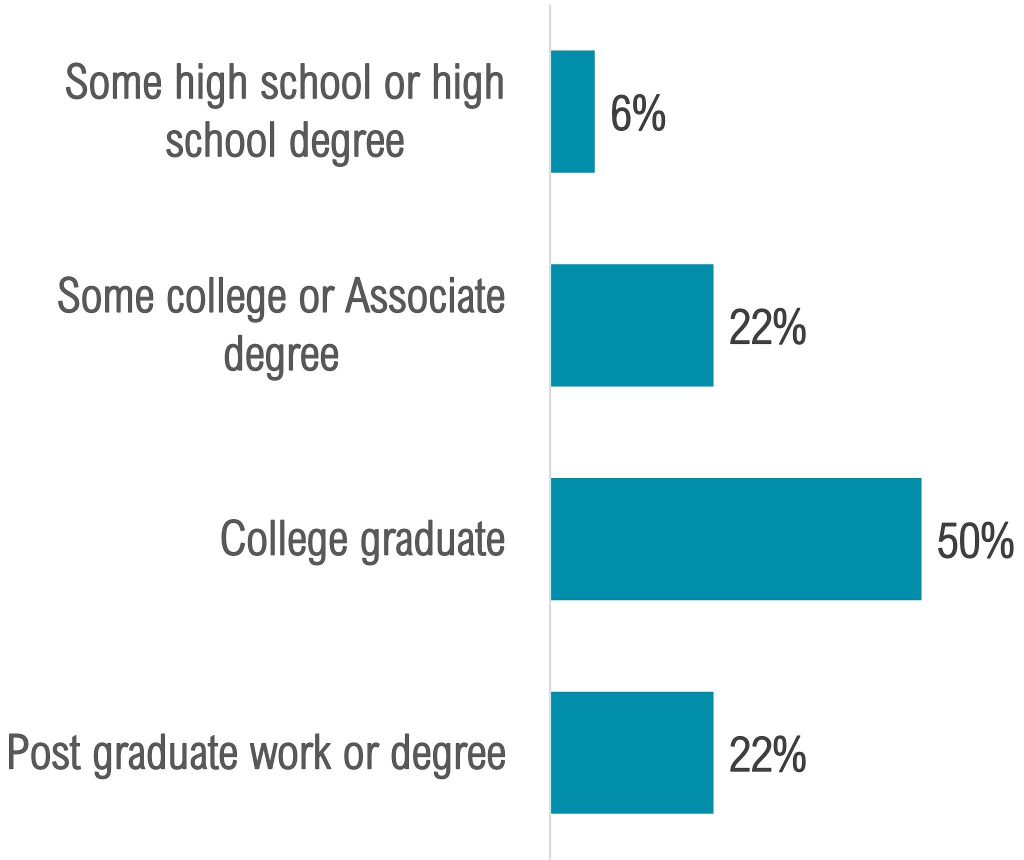
MARITAL STATUS



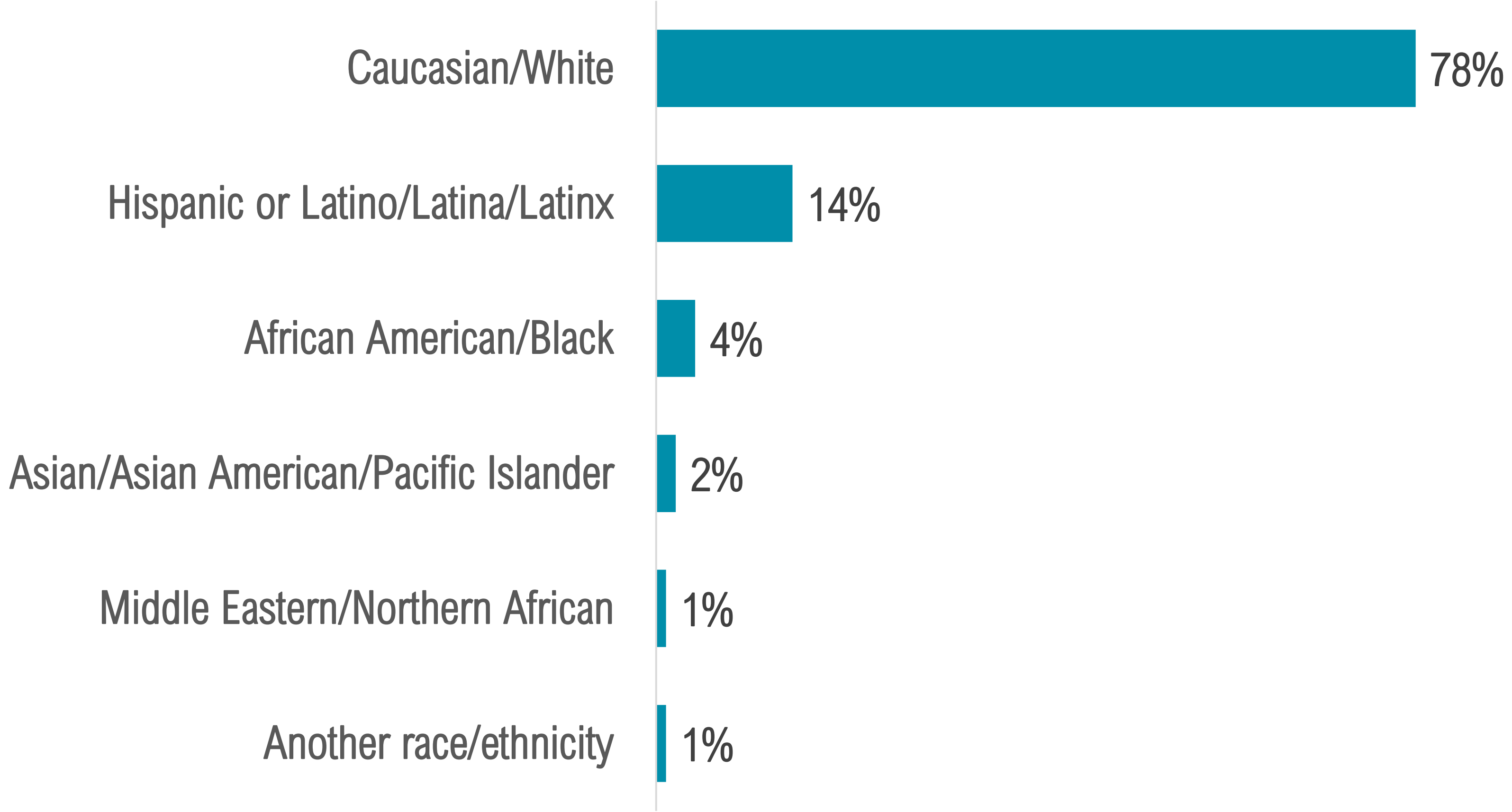
EDUCATION

Education Level

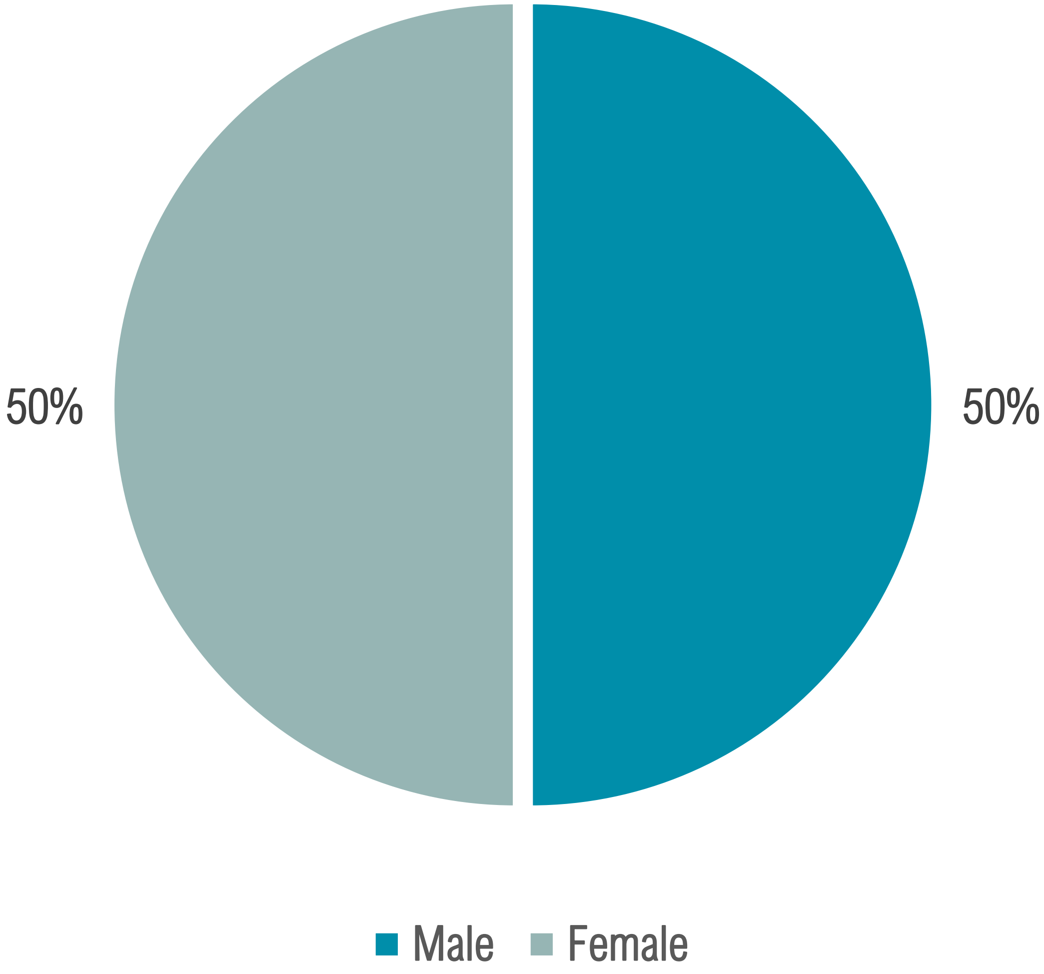
Over 7 in 10 of Oct - Dec visitors had achieved a bachelor's degree or higher.



RACE/ETHNICITY



GENDER[1]



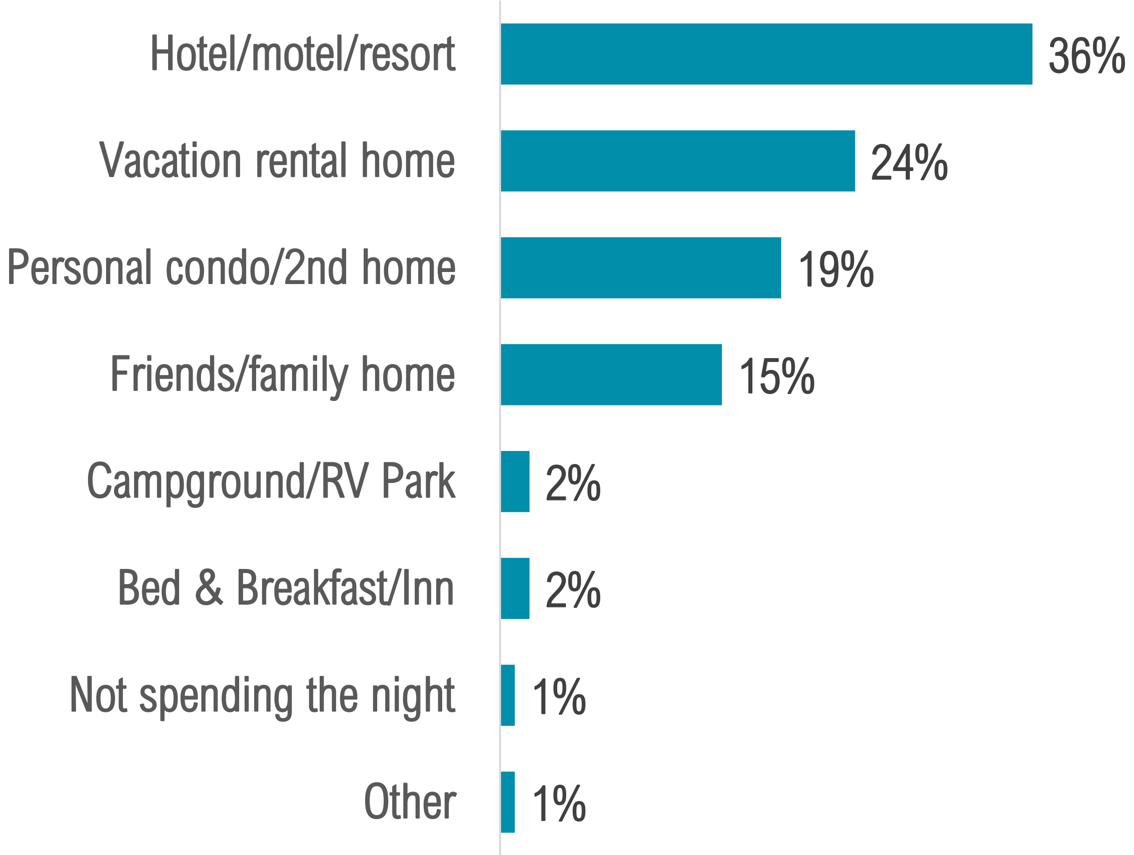
[1]Gender of person interviewed.

VISITOR JOURNEY: TRIP EXPERIENCE

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

ACCOMMODATIONS

Nearly 2 in 3 visitors stayed in paid accommodations



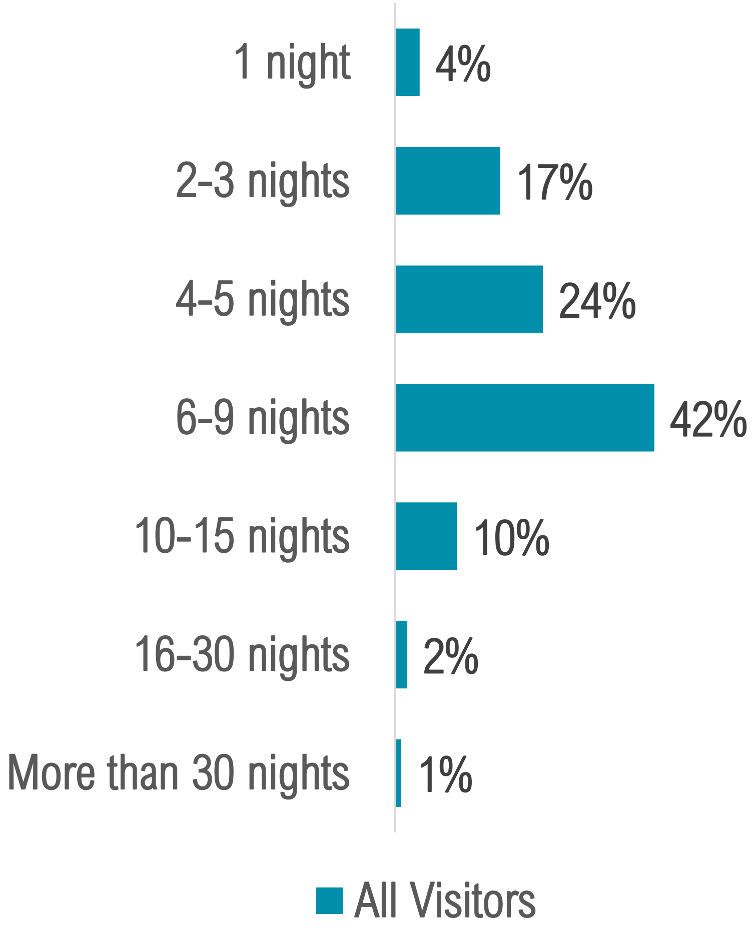
NIGHTS STAYED

All Visitors

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

Visitors Staying in Paid Accommodations

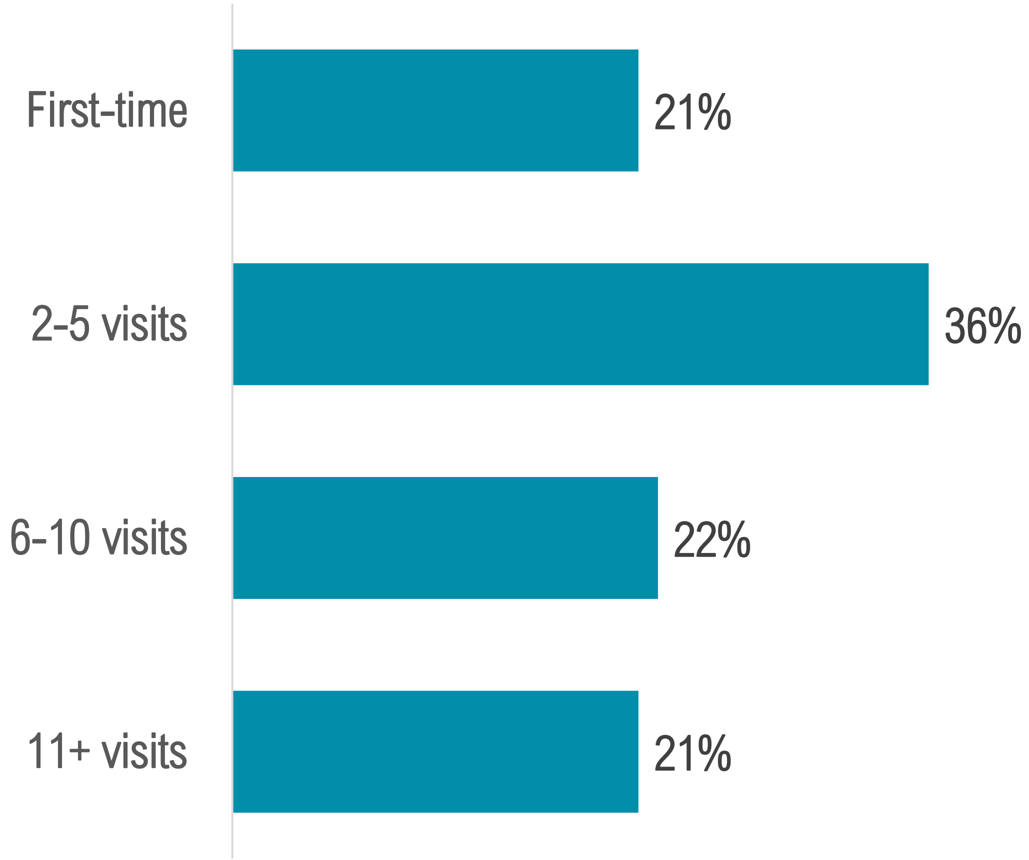
Visitors staying in paid accommodations spent an average of 5.6[2] nights in the Fort Myers area.



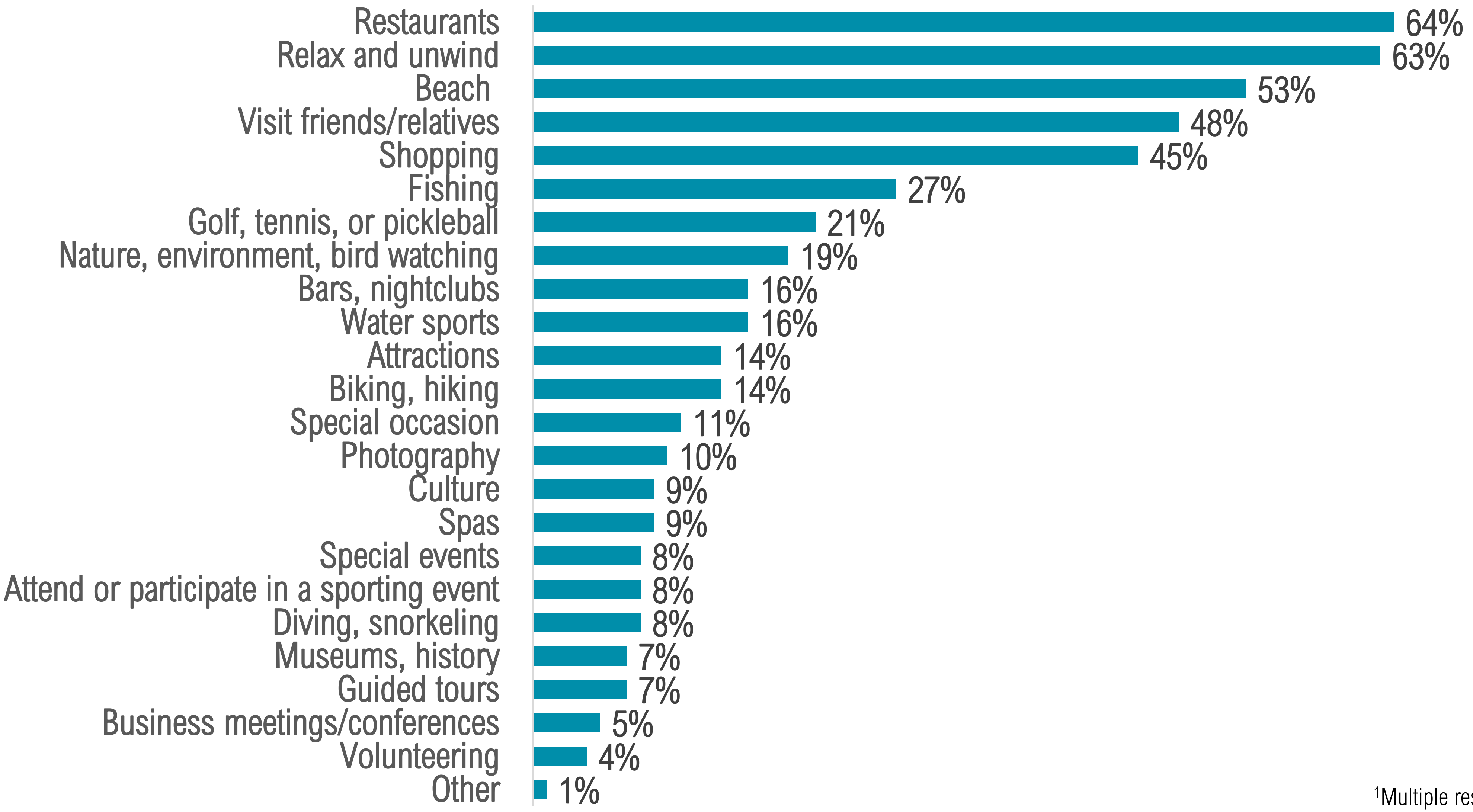
[1]Sources: Occupancy Study and Visitor Tracking Study
[2]Source: Occupancy Study

FIRST TIME AND EXPERIENCED VISITORS

More than 1 in 3 visitors had visited the area 2-5 times, while 1 in 5 were first-time visitors, and another 1 in 5 were loyal visitors (11+ visits).



VISITOR ACTIVITIES[1]



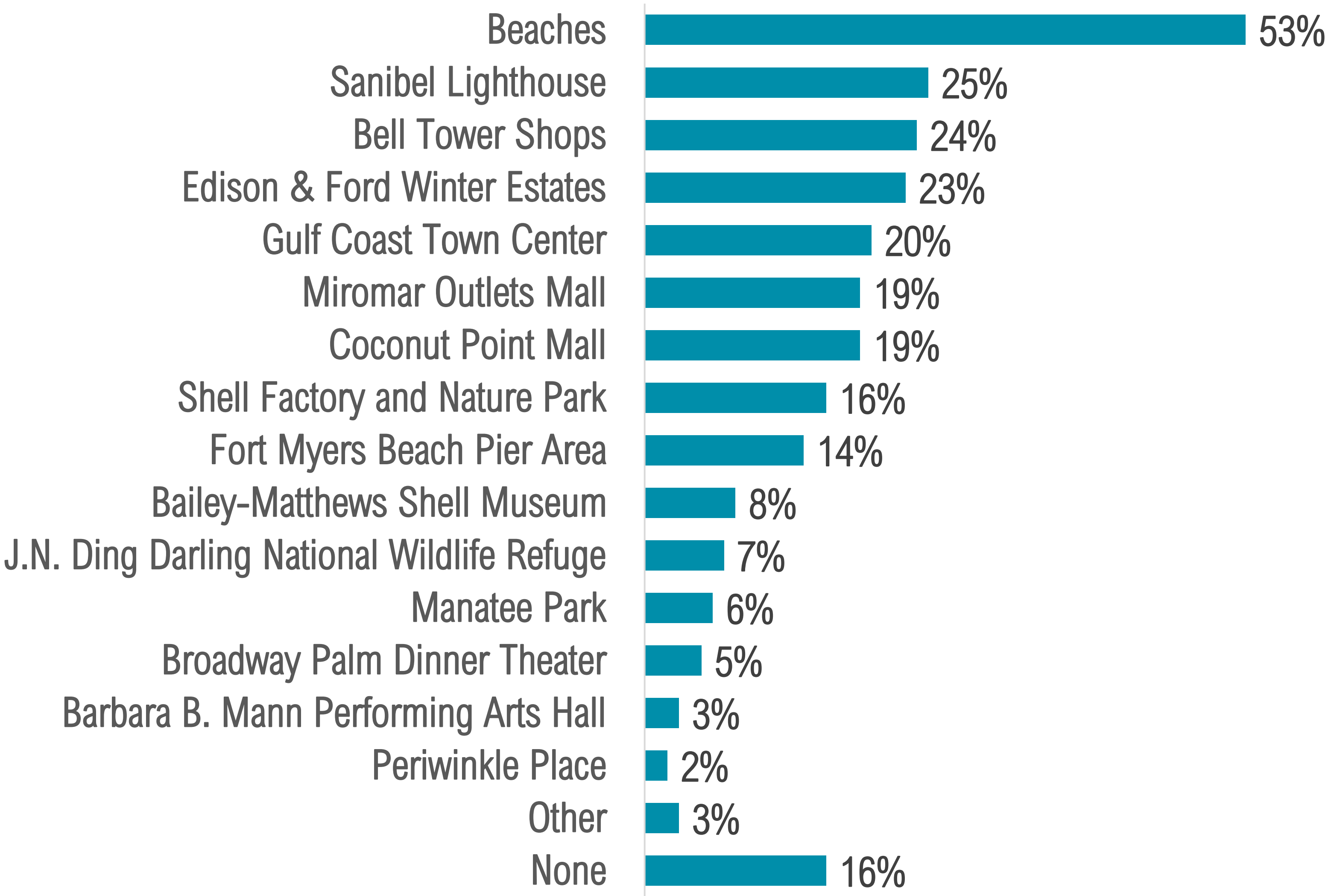
[1]Multiple responses permitted.

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

Reason for Visiting		Visitor Activities
40%	Relax & unwind	63%
37%	Visiting friends & relatives	48%
30%	Beach	53%
11%	Special occasion	11%
10%	Golf or tennis	21%
9%	Shopping	45%
9%	Fishing	27%
7%	Sporting event	8%
6%	Nature, environment, bird watching	19%
6%	Attractions	14%
6%	Special event	8%
4%	Water sports	16%
4%	Business meetings/conferences	4%
3%	Photography	10%
3%	Volunteering	4%
2%	Biking, hiking	14%
2%	Guided tours	7%
1%	Culture	9%
1%	Diving, snorkeling	8%
1%	Museums, history	7%

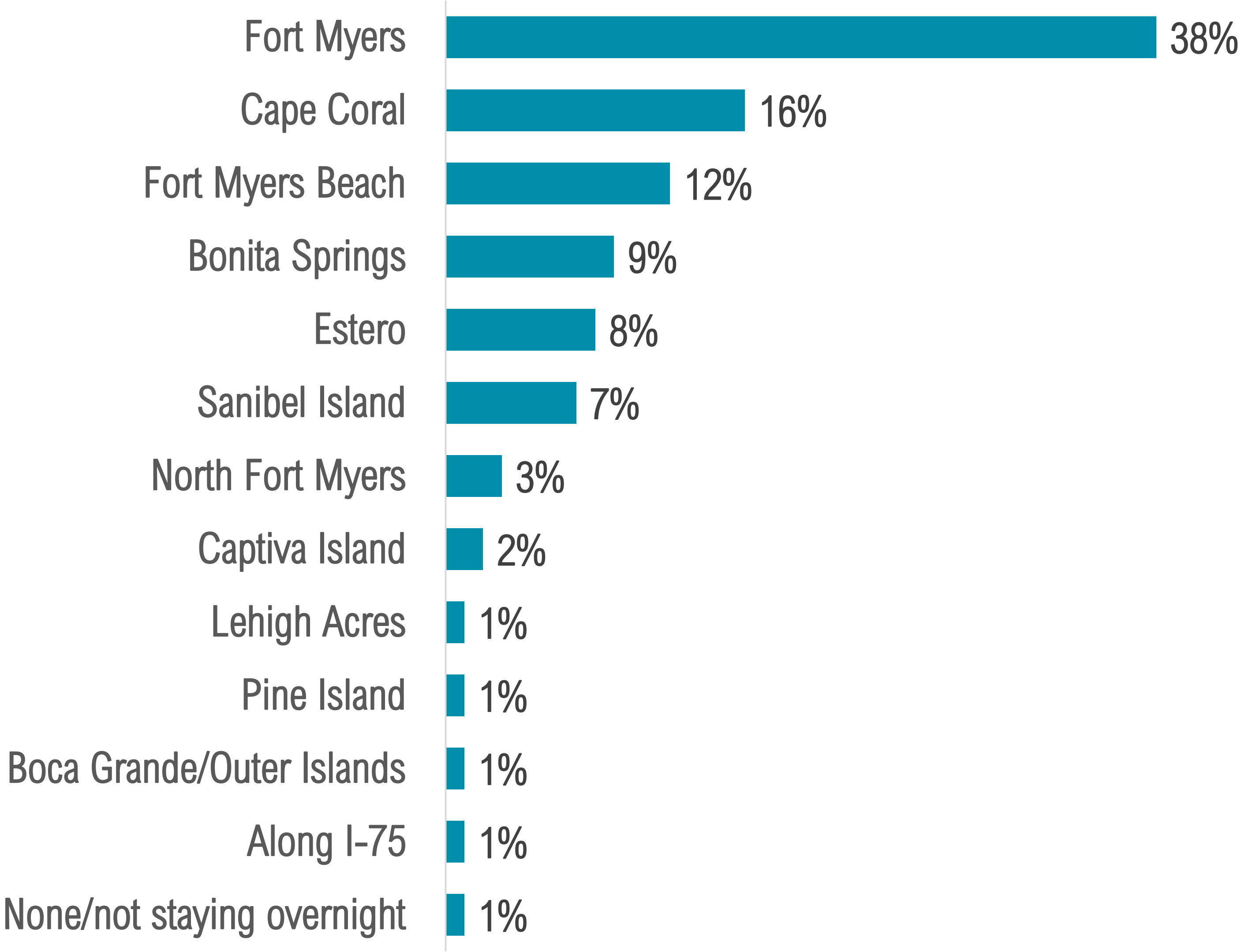
[1]Three responses permitted.
[2]Multiple responses permitted.

ATTRACTIONS VISITED[1]



[1]Multiple responses permitted.

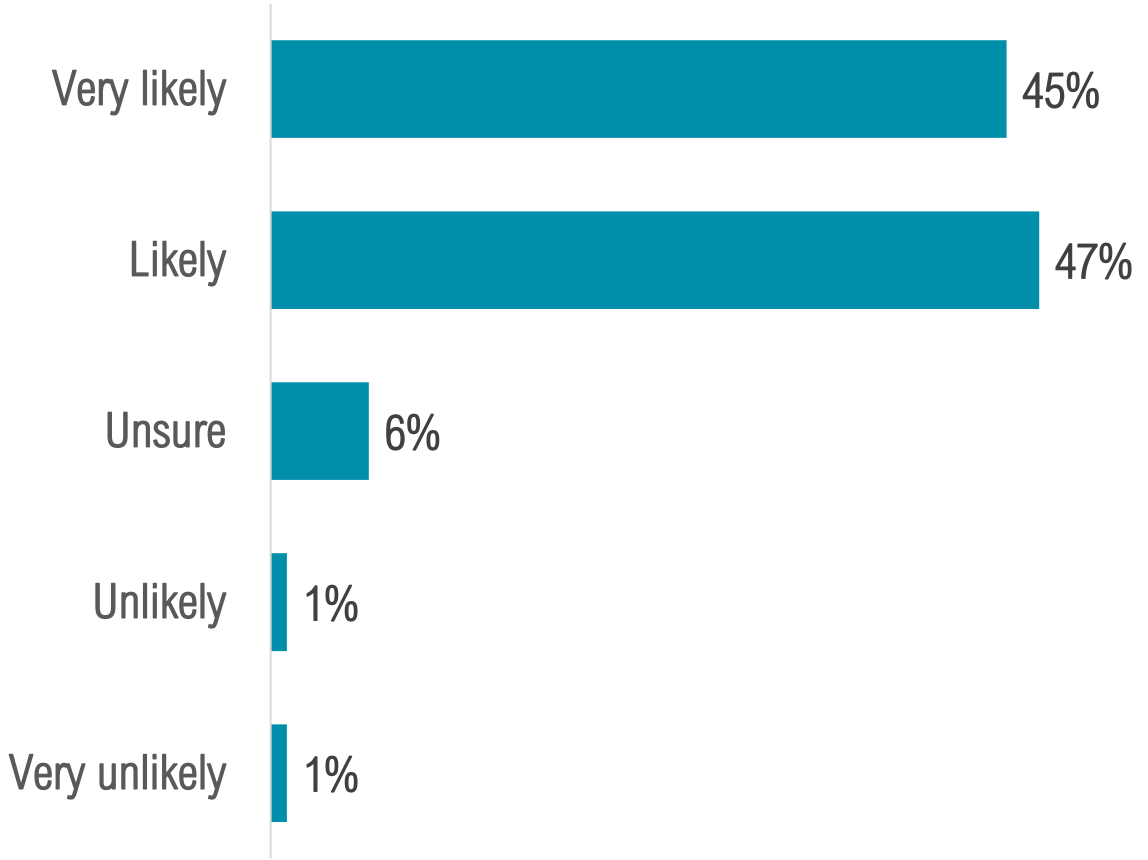
COMMUNITY STAYED



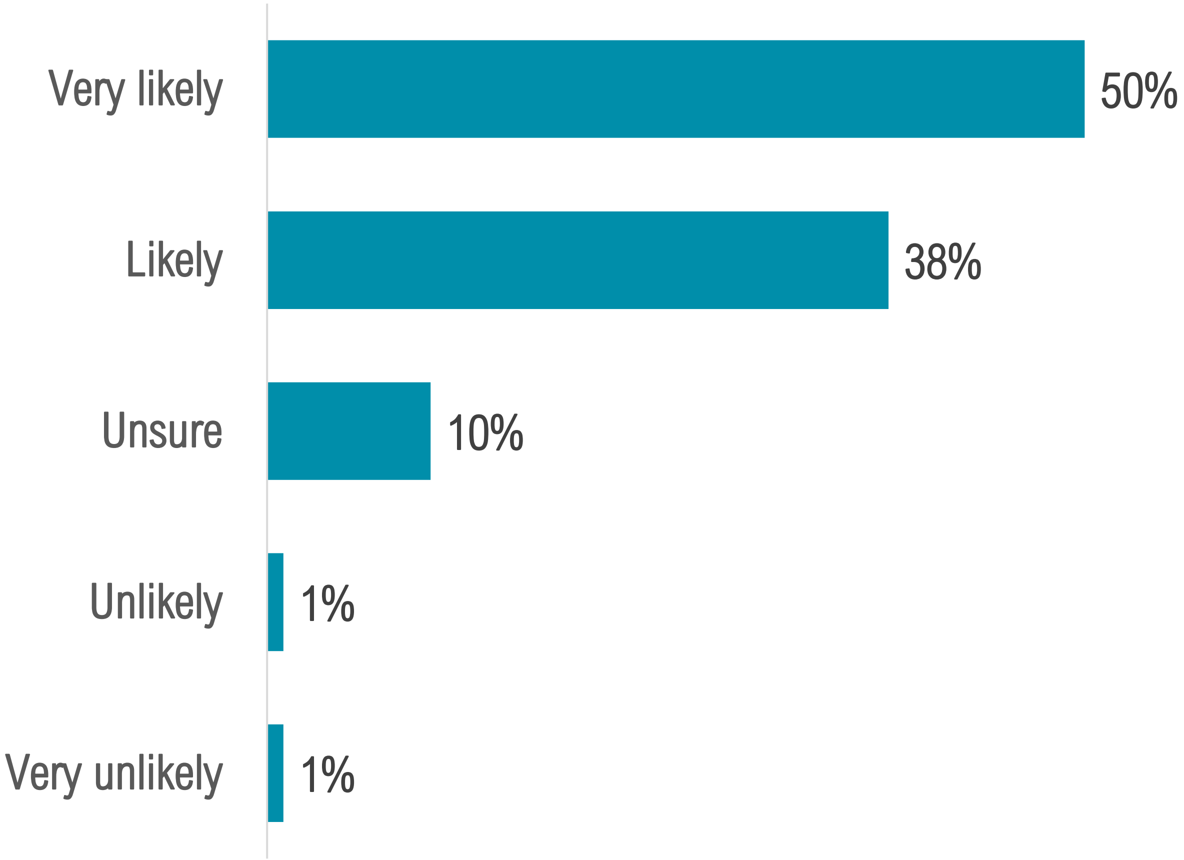
VISITOR JOURNEY: POST-TRIP EVALUATION

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

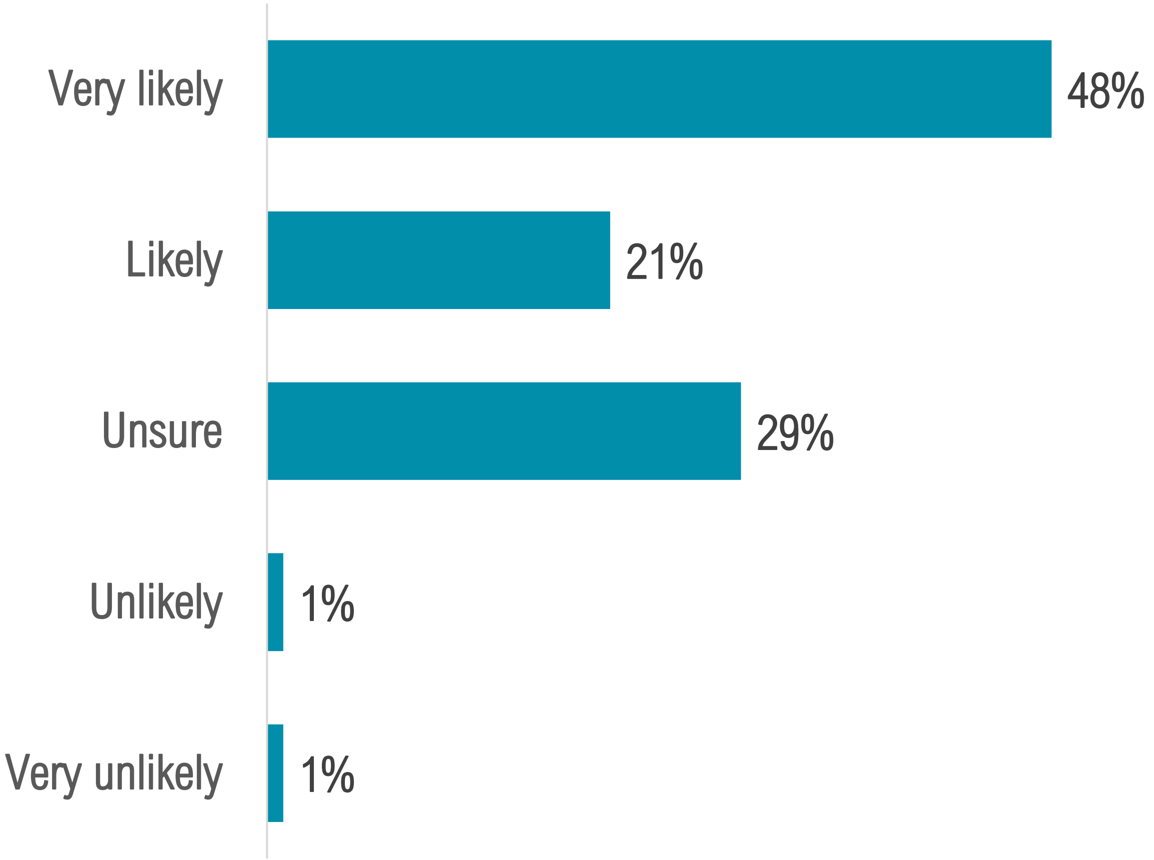
LIKELIHOOD OF RECOMMENDING THE AREA



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	39%	36%	49%	49%	43%	44%	55%	58%
Likely	42%	48%	46%	45%	47%	47%	41%	35%
Unsure/don't know	15%	11%	4%	5%	8%	7%	2%	5%
Unlikely	4%	4%	1%	<1%	2%	1%	2%	1%
Very Unlikely	<1%	1%	<1%	1%	<1%	1%	<1%	1%

CROSSTABULATIONS: LIKELIHOOD OF RETURNING[1]

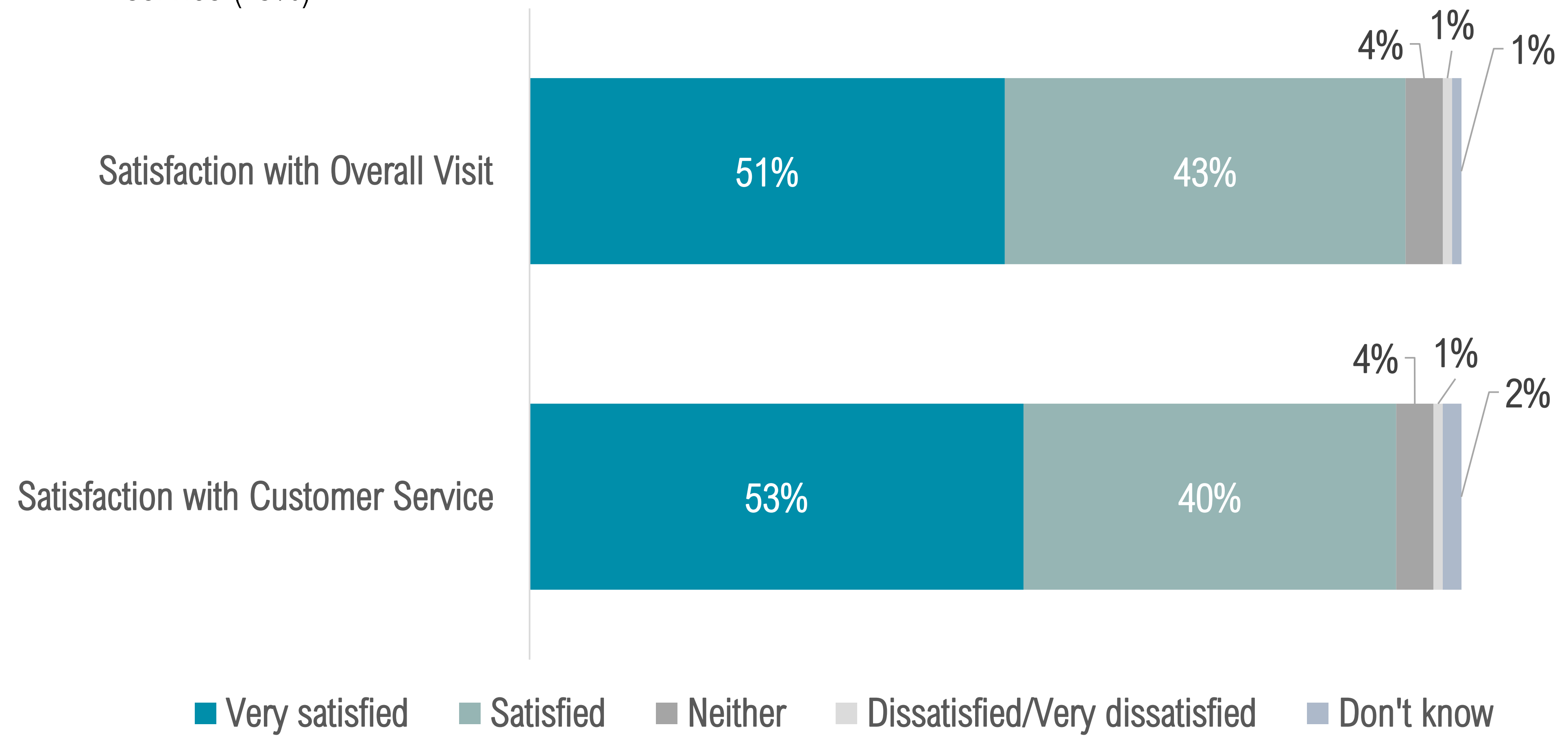
	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2023	2024	2023	2024	2023	2024	2023	2024
Very Likely	40%	35%	59%	55%	49%	47%	67%	66%
Likely	32%	38%	33%	37%	36%	40%	25%	29%
Unsure/don't know	20%	19%	8%	6%	13%	10%	7%	4%
Unlikely	7%	6%	<1%	1%	2%	2%	1%	<1%
Very Unlikely	1%	2%	<1%	1%	<1%	1%	<1%	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	35%	32%	55%	53%	46%	47%	60%	58%
Likely	16%	21%	19%	20%	20%	21%	21%	18%
Unsure/don't know	44%	42%	24%	25%	31%	30%	19%	23%
Unlikely	4%	3%	1%	1%	2%	1%	<1%	<1%
Very Unlikely	1%	2%	1%	1%	1%	1%	<1%	1%

SATISFACTION

- Compared to 2023, visitors were less likely to be very satisfied with their overall visit (-5%) as well as customer service (-3%).



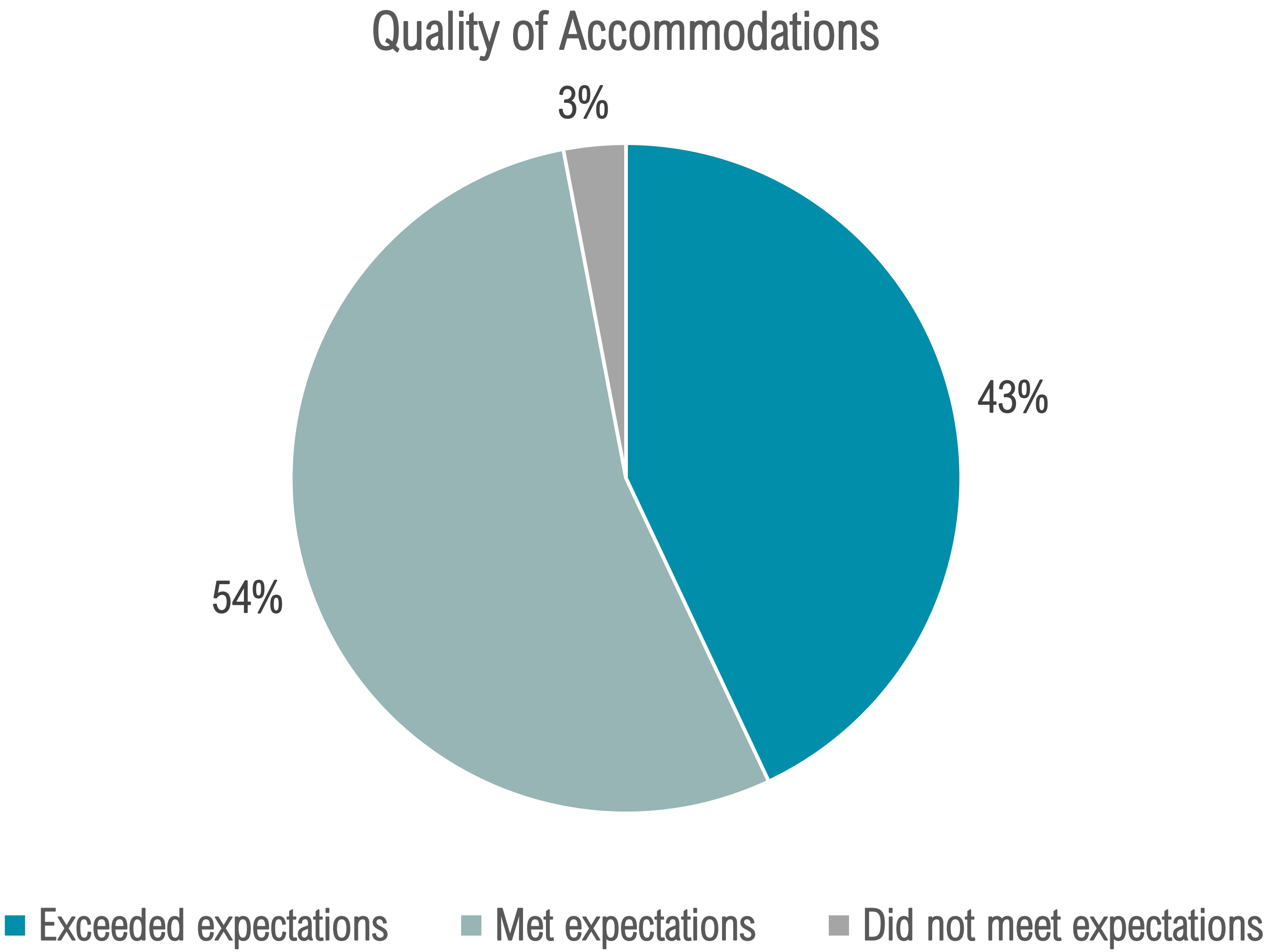
CROSSTABULATIONS: SATISFACTION WITH OVERALL VISIT

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int’l Visitors	
	2023	2024	2023	2024	2023	2024	2023	2024
Very Satisfied	53%	47%	59%	53%	56%	50%	62%	65%
Satisfied	37%	45%	36%	43%	38%	45%	31%	32%
Unsure/don’t know	6%	6%	5%	4%	5%	4%	6%	3%
Dissatisfied	3%	2%	<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%	50%	59%	55%	57%	53%	60%	64%
Satisfied	33%	42%	35%	39%	35%	41%	34%	34%
Unsure/don't know	5%	6%	5%	5%	6%	5%	5%	2%
Dissatisfied	4%	2%	1%	1%	2%	1%	1%	<1%
Very Dissatisfied	1%	<1%	<1%	<1%	<1%	<1%	<1%	<1%

SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

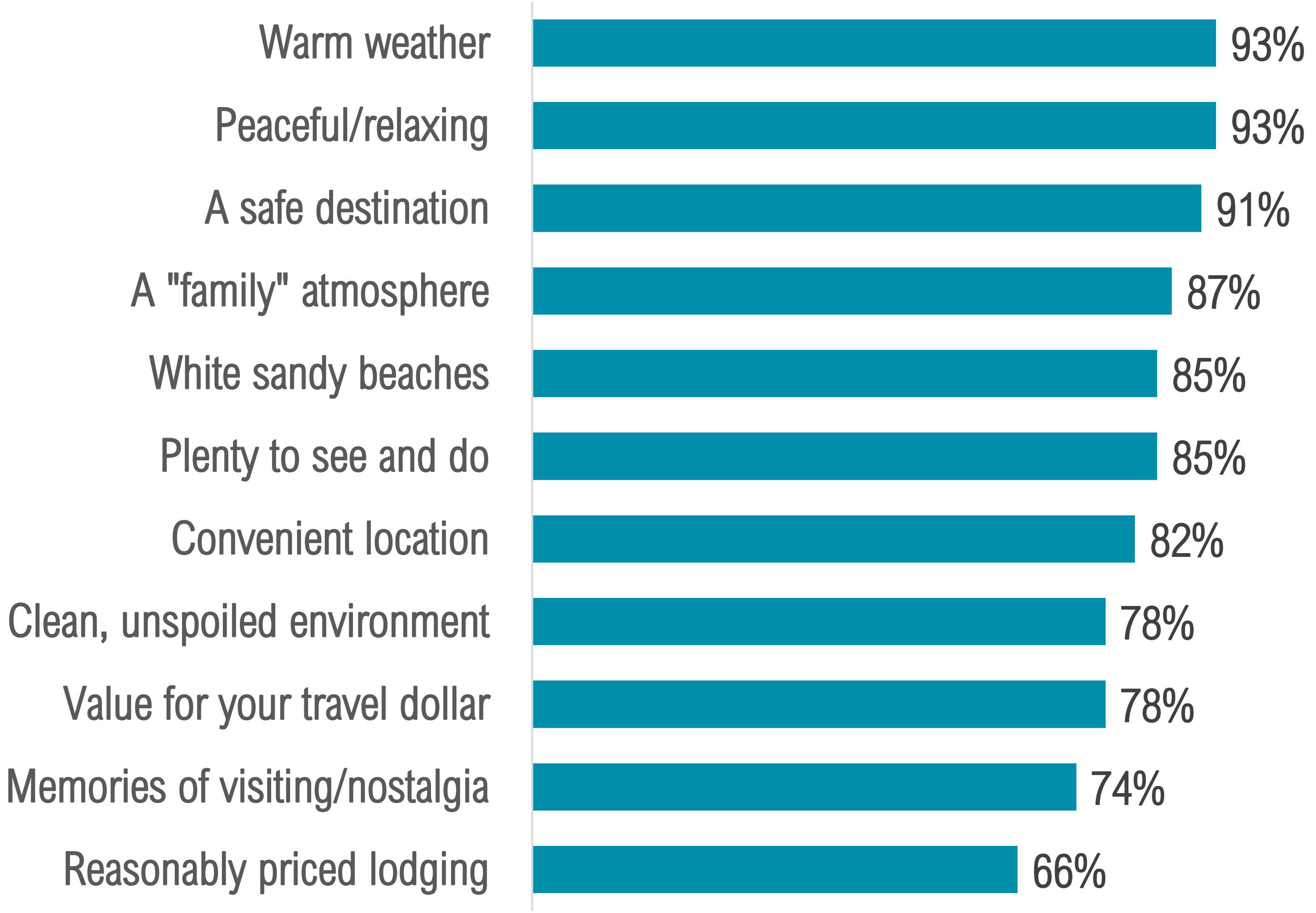


SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

	1st Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2023	2024	2023	2024	2023	2024	2023	2024
Exceeded Expectations	39%	37%	41%	48%	40%	44%	36%	50%
Met Expectations	50%	58%	56%	50%	53%	52%	56%	48%
Did Not Meet Expectations	11%	5%	3%	2%	7%	4%	8%	2%

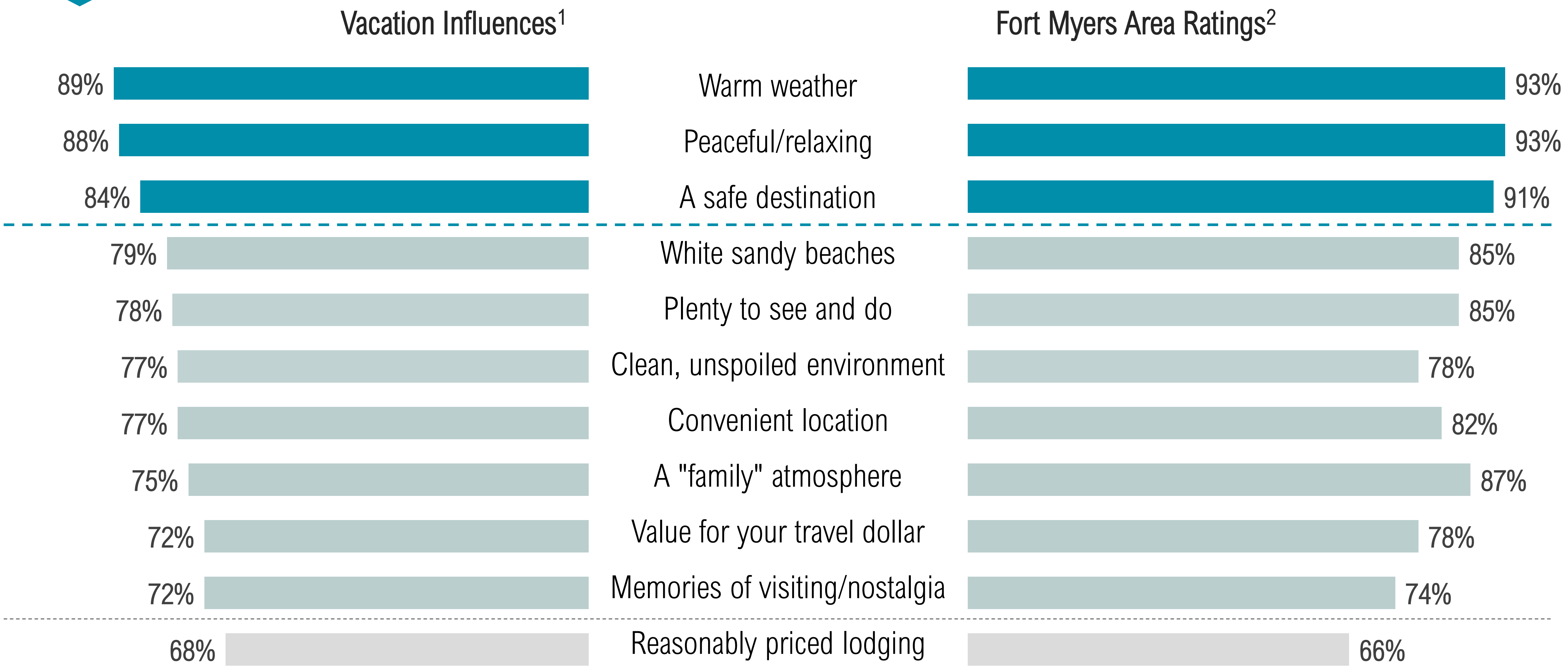
ATTRIBUTE RATINGS[1]

At least **90%** of visitors gave high attribute ratings for **weather, peacefulness,** and **safety** 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

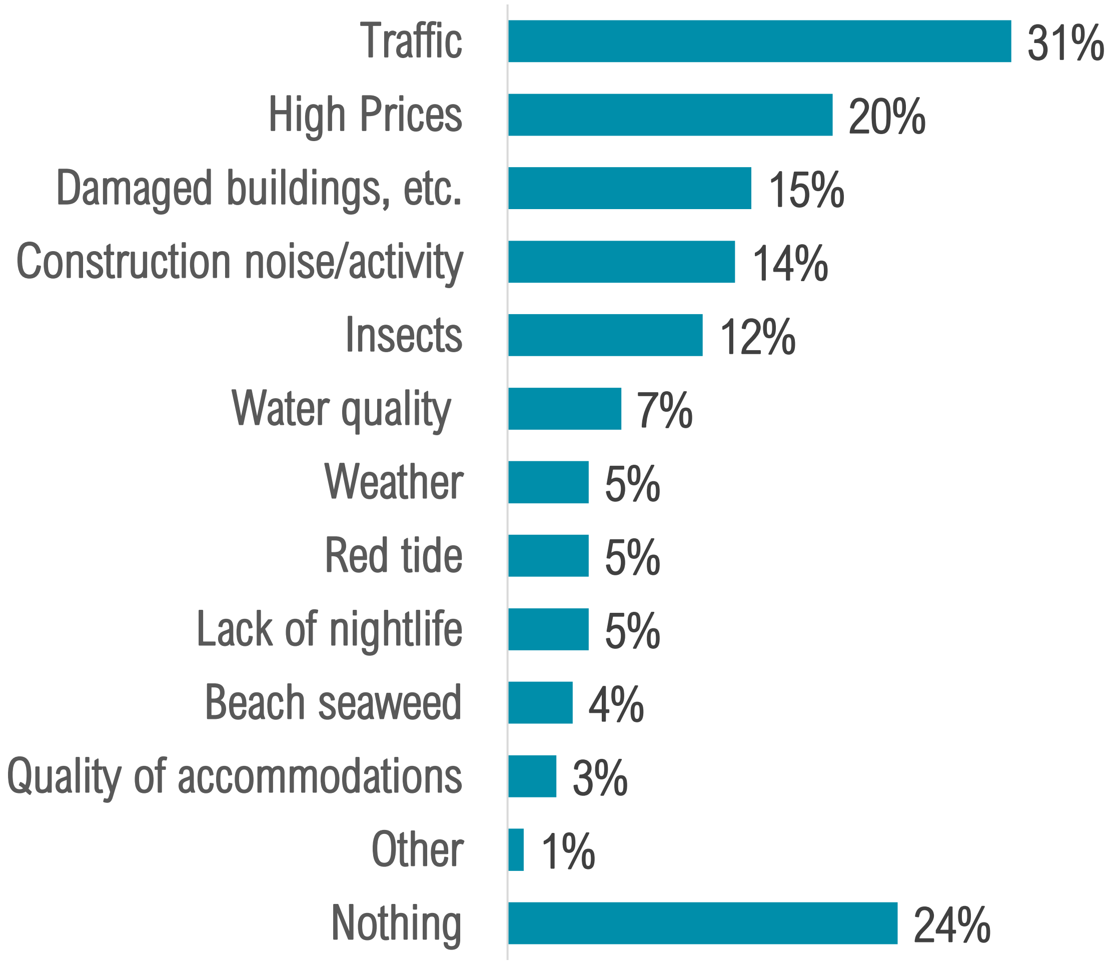


[1]Top 2 box scores. Attributes rated on a scale from 1 to 5 where 1 is Not at All Influential and 5 is Definitely Influential.
[2]Top 2 box scores. Attributes rated on a scale from 1 to 5 where 1 is Poor and 5 is Excellent.

Post-Trip Evaluation
Oct - Dec 2024

LEAST LIKED FEATURES[1]

Nearly 1 in 3 visitors mentioned **traffic,** while **1 in 5** were concerned with **high prices**, and **24%** 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 FROM VISITORS

Peaceful & Relaxing

- “It’s the perfect place to slow down, unwind, and enjoy the simple beauty of the Gulf Coast.”
- “Time just seems to pass slower while you’re here. The atmosphere is so easy going and it really allows you to just relax and live at your own pace.”
- “This is the place to come if you want to truly be able to disconnect and recharge. Everything in the area encourages you to take it easy and soak in the moment.”

Warm Weather

- “We love coming here because when it’s gray and chilly back home, it’s still sunny and warm here.”
- “This time of year is perfect for us. The mornings are crisp, by midday it’s warm, and the afternoons/evenings are still comfortable.”
- “Amazing weather for basking in the sun, listening to the swaying palms and feeling the ocean breeze.”

AREA DESCRIPTIONS FROM VISITORS

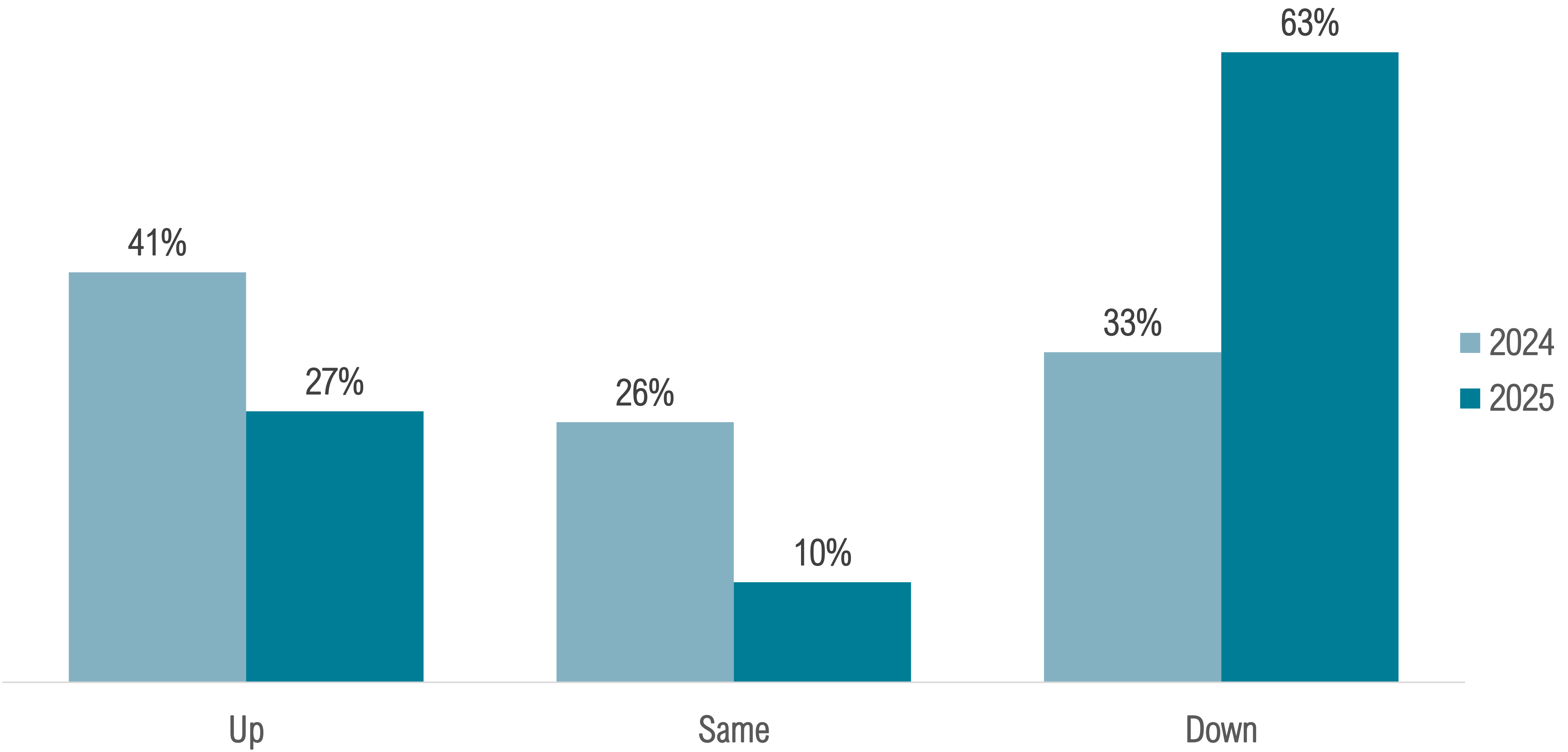
A Safe Destination

- "I've always felt secure here because of all the friendly people and the peaceful coastal vibe that it has."
- "The atmosphere is so calm and inviting, it's been a completely stress-free trip so far and we've enjoyed exploring the area."
- "The people here are so welcoming and it's always a refreshing and relaxing getaway for us."

A "Family" Atmosphere

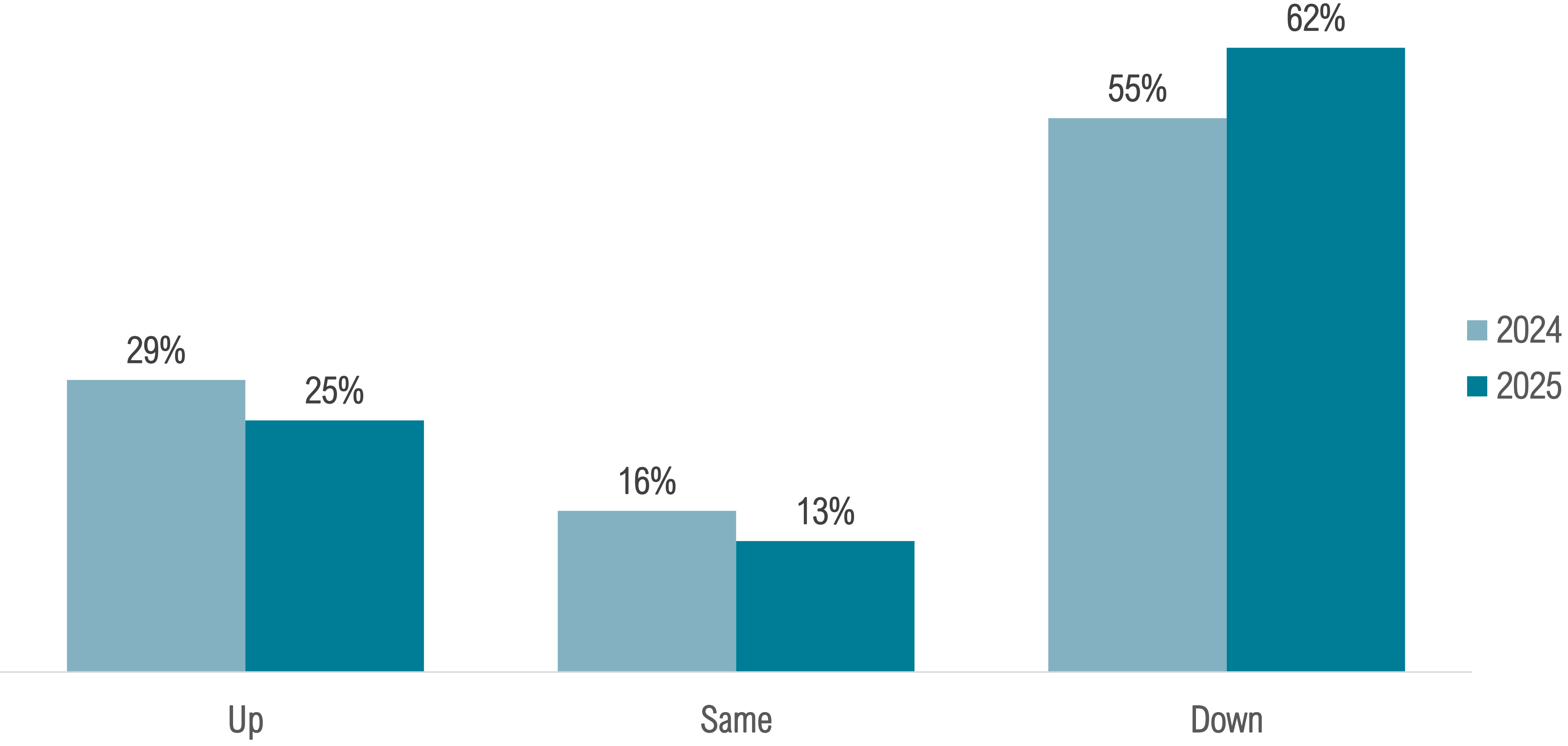
- "Our kids always have a blast because of all the different outdoor activity options. It's a great family-friendly vacation spot."
- "The area offers tons of things for families to do together, from beach days to nature trails, fishing, and more."
- "We love it because of how family-oriented it is. It's not just a ton of crowded tourist traps trying to take advantage of us. It's a place to make real family memories."

OCCUPANCY BAROMETER[1]: JAN – MAR RESERVATIONS



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

OCCUPANCY BAROMETER[1]: APR – JUN RESERVATIONS



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

Year-Over-Year Comparisons

ECONOMIC IMPACT

Visitor & Lodging Statistics	Oct - Dec 2023	Oct - Dec 2024	% Change '23 – '24
Visitors	806,000	867,200	+ 7.6%
Visitor Days	4,715,100	5,411,300	+ 14.8%
Room Nights	1,016,400	1,078,700	+ 6.1%
Direct Expenditures[1]	$658,633,800	$679,771,800	+ 3.2%
Total Economic Impact[2]	$1,054,472,700	$1,082,876,500	+ 2.7%
Occupancy	55.2%	58.0%	+ 5.0%
ADR	$154.89	$154.37	- 0.3%
RevPAR	$85.53	$89.53	+ 4.7%

[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.

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM[1]

	Oct - Dec 2023[4]	Oct - Dec 2024	% Change '23 – '24
Direct Jobs[2]	6,680	6,910	+ 3.4%
Total Jobs[3]	8,990	9,280	+ 3.2%
Direct Wages[2]	$229,430,700	$238,021,100	+ 3.7%
Total Wages[3]	$325,108,700	$336,651,000	+ 3.6%
Direct Local Taxes[2]	$14,270,300	$14,686,800	+ 2.9%
Total Local Taxes[3]	$18,860,900	$19,434,300	+ 3.0%
Direct State Taxes[2]	$30,913,500	$31,815,300	+ 2.9%
Total State Taxes[3]	$41,082,000	$42,331,700	+ 3.0%

[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.
[4] Revised to reflect updated IMPLAN dataset.

VISITOR TYPE

Visitor Type	Oct - Dec 2023	Oct - Dec 2024
Visitors in Paid Accommodations	69%	65%
Visitors in Non-Paid Accommodations	29%	34%
Day Trippers	2%	1%

PRE-VISIT

Planned trip in advance	Oct - Dec 2023	Oct - Dec 2024
1 week or less	5%	5%
2-4 weeks	13%	13%
1-2 months	33%	38%
3-6 months	32%	31%
6 months or more	15%	12%
Not sure	2%	1%

Considered Other Destinations	Oct - Dec 2023	Oct - Dec 2024
Yes	27%	24%
No	73%	76%

PRE-VISIT

Other destinations considered[1]	Oct - Dec 2023[2]	Oct - Dec 2024[3]
Tampa/Clearwater/St. Pete	18%	16%
Miami/Ft. Lauderdale	15%	14%
Sarasota/Siesta Key	13%	13%
Keys/Key West	13%	11%
Orlando	15%	10%
Naples/Marco Island	13%	9%
Daytona Beach	10%	7%
West Palm Beach	6%	5%
Punta Gorda/Englewood	4%	4%
Other destinations in FL	13%	26%
Other destinations outside of FL	17%	18%

[1]Multiple responses permitted.
[2]Base: 27% of visitors who considered other destinations.
[3]Base: 24% of visitors who considered other destinations.

PRE-VISIT

Trip Planning Websites/Apps[1]	Oct - Dec 2023	Oct - Dec 2024
Airline websites/apps	32%	36%
Online search engines	25%	29%
Airbnb, Vrbo, etc.	17%	19%
Hotel websites/apps	17%	16%
Booking websites	16%	16%
Vacation rental websites/apps	11%	12%
Visit Florida	8%	11%
Trip Advisor	14%	11%
VCB Website	7%	10%
VCB Facebook Page	6%	8%
Facebook	7%	7%
Traveler reviews, blogs, stories	7%	7%
Instagram	3%	6%
YouTube, Hulu, Pandora	3%	4%
Other	4%	2%
None	23%	23%

[1]Multiple responses permitted.

PRE-VISIT

Information Requests[1]	Oct - Dec 2023	Oct - Dec 2024
Calling a hotel, motel, condo	23%	19%
Requesting and receiving a visitor guide	9%	10%
Receiving the VCB e-newsletter	2%	6%
Calling the VCB	2%	3%
Calling a local Chamber of Commerce	2%	3%
Other	2%	1%
None	70%	68%

[1]Multiple responses permitted.

PRE-VISIT

Recall of Lee County Promotions	Oct - Dec 2023	Oct - Dec 2024
Yes	38%	35%
No	43%	46%
Not sure	19%	19%
% of recallers influenced by promotions	49%	57%
% of total visitors influenced by promotions	19%	20%

PRE-VISIT

Type of Promotions Recalled[1]	Oct - Dec 2023[2]	Oct - Dec 2024[3]
Internet	50%	51%
Social media	33%	37%
Traveler reviews, blogs	17%	21%
Television	13%	15%
www.VisitFortMyers.com	9%	13%
Travel/visitor guide	7%	11%
Magazine	9%	10%
Newspaper	7%	8%
Radio	3%	7%
Email/e-newsletter	6%	7%
Deal-based promotion	3%	6%
Video streaming services	7%	6%
Billboard	3%	5%
Brochure	4%	4%
AAA	5%	4%
Podcasts	1%	2%
Music streaming services	1%	1%
Other	4%	3%

[1]Multiple responses permitted.
[2]Base: 38% of visitors who recalled seeing a promotion.
[3]Base: 35% of visitors who recalled seeing a promotion.

PRE-VISIT

Characteristics influencing decision to visit Lee County (top 2 boxes)[1]	Oct - Dec 2023	Oct - Dec 2024
Warm weather	87%	89%
Peaceful/relaxing	86%	88%
A safe destination	83%	84%
White sandy beaches	77%	79%
Plenty to see and do	76%	78%
Clean, unspoiled environment	74%	77%
Convenient location	76%	77%
A "family" atmosphere	72%	75%
Value for your travel dollar	72%	72%
Memories of visiting/nostalgia	74%	72%
Reasonably priced lodging	62%	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]	Oct - Dec 2023	Oct - Dec 2024
Relax & unwind	40%	40%
Visiting friends & relatives	32%	37%
Beach	28%	30%
Checking-in on my property	12%	13%
Part-time resident ("Snowbird")	9%	13%
Special occasion	7%	11%
Golf or tennis	10%	10%
Fishing	6%	9%
Shopping	8%	9%
Sporting event	5%	7%
Special event	8%	6%
Attractions	4%	6%
Nature, environment, bird watching	6%	6%
Business meetings/conferences	8%	4%
Water sports	6%	4%
Photography	4%	3%
Volunteering	4%	3%
Work-related hurricane recovery	5%	2%
Biking, hiking	2%	2%
Guided tours	2%	2%
Culture	1%	1%
Museums, history	1%	1%
Diving, snorkeling	1%	1%
Other	4%	2%

[1]Multiple responses permitted.

PRE-VISIT

Transportation	Oct - Dec 2023	Oct - Dec 2024
Fly	69%	71%
Drive a personal vehicle	21%	24%
Drive a rental vehicle	6%	3%
Drive a RV	2%	1%
Travel by bus	<1%	<1%
Other	2%	1%

Airport Used	Oct - Dec 2023	Oct - Dec 2024
Southwest Florida International	84%	75%
Miami International	2%	9%
Punta Gorda	7%	8%
Ft. Lauderdale International	3%	4%
Tampa International	2%	3%
Orlando International	1%	1%
Other	1%	<1%

TRAVEL PARTY PROFILE

Visitor Origin[1]	Oct - Dec 2023	Oct - Dec 2024
Florida	6.7%	8.6%
Southeast	20.2%	19.4%
Northeast	19.3%	19.7%
Midwest	32.1%	30.0%
West	8.5%	9.0%
Canada	6.4%	6.7%
United Kingdom	1.3%	1.4%
Germany	3.6%	3.1%
Other Europe	1.0%	1.0%
Other International	0.9%	1.1%

Visitor Origin[1]	Oct - Dec 2023	Oct - Dec 2024
Chicago	4%	6%
New York	5%	5%
Atlanta	4%	5%
Detroit	3%	3%
Philadelphia	3%	3%
Minneapolis-St. Paul	3%	3%
Boston	2%	3%
Washington, DC-Hagerstown	2%	3%
Miami-Ft. Lauderdale	1%	3%
Denver	2%	3%

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

TRAVEL PARTY PROFILE

Travel Parties	Oct - Dec 2023	Oct - Dec 2024
Mean travel party size[1]	2.9	3.0
Travel with children under age 18	32%	36%

Travel Party Composition	Oct - Dec 2023	Oct - Dec 2024
As a family	36%	38%
As a couple	34%	36%
By yourself	15%	16%
With other couples/friends	8%	6%
With business associates	5%	3%
In a tour group	<1%	<1%
Other	2%	1%

[1]Sources: Occupancy Study and Visitor Tracking Study

TRAVEL PARTY PROFILE

Marital Status	Oct - Dec 2023	Oct - Dec 2024
Married/Domestic Partnership	75%	80%
Single	25%	20%

Age	Oct - Dec 2023	Oct - Dec 2024
Average age	50	51
Median age	50	51

Household Income	Oct - Dec 2023	Oct - Dec 2024
Median Income	$103,300	$108,700

TRAVEL PARTY PROFILE

Race/Ethnicity	Oct - Dec 2023	Oct - Dec 2024
Caucasian/White	74%	78%
Hispanic/Latino/Latina/Latinx	14%	14%
African American/Black	5%	4%
Asian/Asian American/Pacific Islander	3%	2%
Middle Eastern/Northern African	2%	1%
Another race/ethnicity	2%	1%

Gender[1]	Oct - Dec 2023	Oct - Dec 2024
Female	50%	50%
Male	50%	50%
Non-binary	<1%	<1%

[1]Of person interviewed.

TRIP EXPERIENCE

Length of Stay[1]	Oct - Dec 2023	Oct - Dec 2024
Average nights in the Fort Myers area	5.9	6.2

First Time/Repeat Visitors	Oct - Dec 2023	Oct - Dec 2024
First-time	27%	21%
Repeat	73%	79%

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

TRIP EXPERIENCE

Type of Accommodations	Oct - Dec 2023	Oct - Dec 2024
Hotel/motel/resort	38%	36%
Vacation rental home	27%	24%
Personal condo, house, timeshare, etc.	15%	19%
Friends/family home	14%	15%
Campground/RV Park	2%	2%
Bed & Breakfast/Inn	1%	2%
Other	1%	1%
Not spending the night	2%	1%

TRIP EXPERIENCE

Activities[1]	Oct - Dec 2023	Oct - Dec 2024
Restaurants	60%	64%
Relax and unwind	61%	63%
Beach	50%	53%
Visit friends/relatives	43%	48%
Shopping	41%	45%
Fishing	21%	27%
Golf, tennis, or pickleball	14%	21%
Nature, environment, bird watching	23%	19%
Bars, nightclubs	17%	16%
Water sports	17%	16%
Attractions	12%	14%
Biking, hiking	14%	14%
Special occasion	9%	11%
Photography	10%	10%
Culture	7%	9%
Spas	6%	9%
Special events	8%	8%
Attend or participate in a sporting event	6%	8%
Diving, snorkeling	6%	8%
Museums, history	8%	7%
Guided tours	6%	7%
Business meetings/conferences	9%	5%
Volunteering	5%	4%
Other	2%	1%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Attractions[1]	Oct - Dec 2023	Oct - Dec 2024
Beaches	50%	53%
Sanibel Lighthouse	15%	25%
Bell Tower Shops	23%	24%
Edison & Ford Winter Estates	19%	23%
Gulf Coast Town Center	19%	20%
Miromar Outlets Mall	21%	19%
Coconut Point Mall	17%	19%
Shell Factory and Nature Park	14%	17%
Fort Myers Beach Pier Area	12%	14%
Bailey-Matthews Shell Museum	5%	8%
J.N. Ding Darling National Wildlife Refuge	7%	7%
Manatee Park	6%	6%
Broadway Palm Dinner Theater	3%	5%
Barbara B. Mann Performing Arts Hall	2%	3%
Periwinkle Place	<1%	2%
Other	5%	3%
None	15%	17%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Area stayed	Oct - Dec 2023	Oct - Dec 2024
Fort Myers	39%	38%
Cape Coral	14%	16%
Fort Myers Beach	12%	12%
Bonita Springs	10%	9%
Estero	8%	8%
Sanibel Island	6%	7%
North Fort Myers	3%	3%
Captiva Island	2%	2%
Lehigh Acres	1%	1%
Pine Island	1%	1%
Boca Grande/Outer Islands	1%	1%
Along I-75	1%	1%
None/not staying overnight	2%	1%

POST-TRIP EVALUATION

Likelihood of Recommending the Area	Oct - Dec 2023	Oct - Dec 2024
Very Likely	44%	45%
Likely	46%	47%
Unsure/don't know	8%	6%
Unlikely	2%	1%
Very Unlikely	<1%	1%

Likelihood of Returning to the Area	Oct - Dec 2023	Oct - Dec 2024
Very Likely	51%	50%
Likely	34%	38%
Unsure/don't know	13%	10%
Unlikely	2%	1%
Very Unlikely	<1%	1%

Likelihood of Returning Next Year	Oct - Dec 2023	Oct - Dec 2024
Very Likely	48%	48%
Likely	20%	21%
Unsure/don't know	29%	29%
Unlikely	2%	1%
Very Unlikely	1%	1%

POST-TRIP EVALUATION

Satisfaction with Accommodations	Oct - Dec 2023	Oct - Dec 2024
Exceeded expectations	39%	43%
Met expectations	56%	54%
Did not meet expectations	5%	3%

POST-TRIP EVALUATION

Satisfaction with Visit	Oct - Dec 2023	Oct - Dec 2024
Very satisfied	56%	51%
Satisfied	38%	43%
Neither	4%	4%
Dissatisfied	1%	1%
Very dissatisfied	<1%	<1%
Don't know/no opinion	1%	1%

Satisfaction with Customer Service	Oct - Dec 2023	Oct - Dec 2024
Very satisfied	56%	53%
Satisfied	36%	40%
Somewhat satisfied	5%	4%
Dissatisfied	1%	1%
Very dissatisfied	<1%	<1%
Don't know/no opinion	2%	2%

POST-TRIP EVALUATION

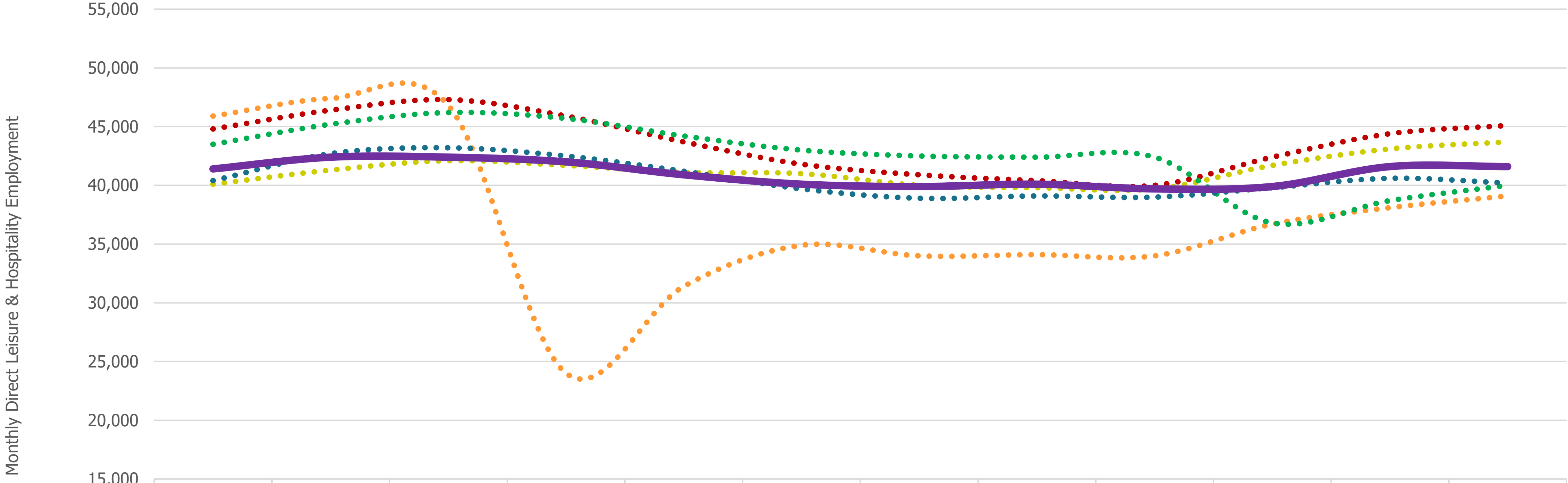
Visitor Concerns[1]	Oct - Dec 2023	Oct - Dec 2024
Traffic	29%	31%
High Prices	19%	20%
Damaged buildings, signs, and landscapes	14%	15%
Construction noise/activity	9%	14%
Insects	13%	12%
Water quality	7%	7%
Weather	7%	5%
Red tide	5%	5%
Lack of nightlife	5%	5%
Beach seaweed	4%	4%
Quality of accommodations	3%	3%
Other	2%	1%
Nothing	24%	24%

[1]Multiple responses permitted.

Industry Data

LEISURE & HOSPITALTY EMPLOYMENT

Lee County Direct Leisure and Hospitality Employment (Calendar Year)[1]

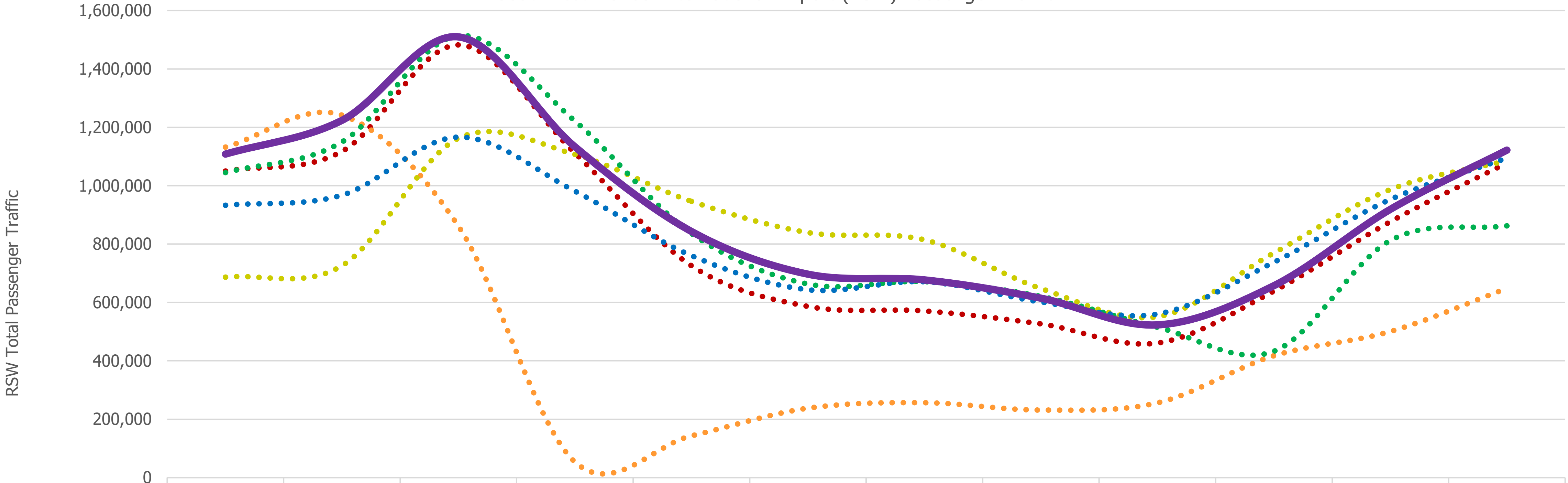


	January	February	March	April	May	June	July	August	September	October	November	December
2019	44,800	46,400	47,300	45,900	43,700	41,800	40,900	40,400	40,000	42,400	44,400	45,100
2020	45,900	47,400	46,800	24,000	31,400	34,900	34,000	34,100	34,000	36,700	38,100	39,100
2021	40,100	41,300	42,100	41,700	41,100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

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

RSW PASSENGER TRAFFIC

Southwest Florida International Airport (RSW) Passenger Traffic[1]



	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	677,137	614,531	523,004	657,488	919,108	1,121,793

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

LICENSED TRANSIENT RENTAL UNITS

Licensed Transient Rental Units in Lee County, as of January 2025[1]

	Hotel	Motel	Bed & Breakfast	Vacation Rental	Total
Fort Myers	5,978	1,132	9	467	7,586
Cape Coral	584	204	0	2,413	3,201
Fort Myers Beach	861	382	6	1,479	2,728
Sanibel	68	685	0	1,509	2,262
Bonita Springs	1,244	38	0	484	1,766
North Fort Myers	0	578	0	43	621
Estero	566	0	0	18	584
Captiva	107	156	0	262	525
Boca Grande	77	107	0	261	445
Lehigh Acres	75	0	0	187	262
Saint James City	0	20	0	54	74
Bokeelia	0	31	0	40	71
Matlacha	0	0	2	24	26
Cabbage Key	0	9	0	0	9
Alva	0	0	0	3	3
Iona	0	0	0	1	1
Miromar Lakes	0	0	0	1	1
Pineland	0	0	0	0	0
Total	**9,560**	**3,342**	**17**	**7,246**	**20,165[2]**

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

Methodology

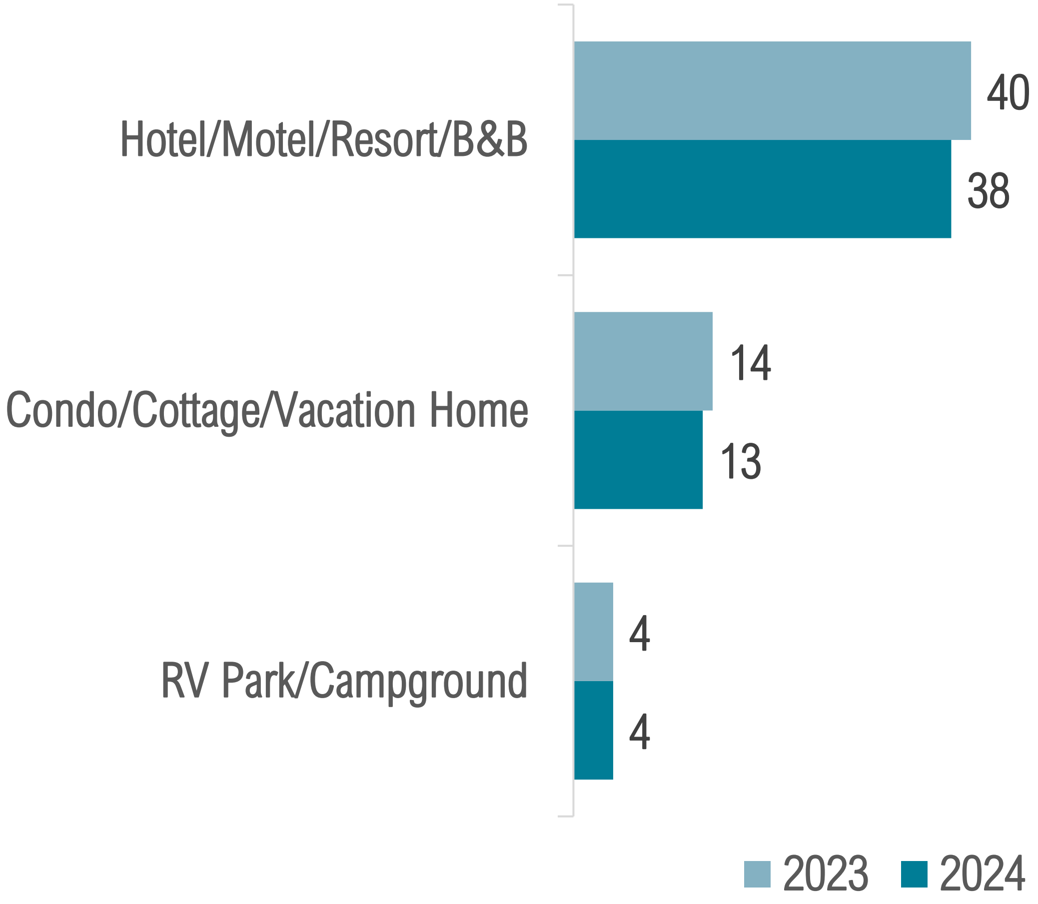
METHODOLOGY

- Economic Impact of tourism in Lee County is derived from:
  - Visitor Tracking Study
    - 895 surveys in public areas, hotels, and at events around Lee County, and online
    - Target individuals: October - December visitors to Lee County
    - Data Collection: October - December 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 5,013 hotel/rental/campground units (55 properties) reporting to DSG, 10,311 hotel units reporting to STR (84 properties), and 3,121 rental units (107 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: 55 completed surveys
    - Data Collection: Completed in Jan 2025 (for Oct - Dec 2024)
  - Total Sample Size:
    - Data from 5,013 hotel/rental/campground units reporting to DSG (representing 55 properties)
    - Data from 10,311 hotel units reporting to STR (representing 84 properties)
    - Data from 3,121 rental units reporting to KeyData (representing 107 property managers)

Number of Complete Responses



Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

Oct - Dec 2024

Visitor Tracking, Occupancy, & Economic Impact Study

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