Fort Myers - Islands, Beaches and Neighborhoods

Lee County VCB

Calendar Year 2024

Visitor Tracking, Occupancy & Economic Impact Study

Downs & St. Germain Research

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

2024 METRICS SNAPSHOT

January – December 2024

- 3.20m Visitors (+15.5% from 2023)
  - 2.84m Domestic Visitors (+16.3% from 2023)
  - 364k International Visitors (+9.2% from 2023)
- 4.41m Room Nights (+15.1% from 2023)
- $3.11b in Visitor Spending (+17.9% from 2023)
- $4.95b in Total Economic Impact (+17.3% from 2023)
- 42k Total Jobs Supported by Tourism (+12.2% from 2023)
- $1.60b in Total Wages Supported by Tourism (+15.0% from 2023)
- $1,049 in Tax Savings per Lee County Household (+23.3% from 2023)

58.8%	$178.86	$105.22
OCCUPANCY RATE	AVERAGE DAILY RATE	REVENUE PER ROOM
↑ 3.6% from 2023	↑ 6.8% from 2023	↑ 10.6% from 2023

fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

downs & st. germain RESEARCH

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

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

DIRECT SPENDING

Visitors who traveled to the Fort Myers area in CY 2024 spent

$3,108,446,700

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

An increase of **17.9%**

TOURISM MATTERS TO LEE COUNTY

Visitor spending in CY 2024 generated
a total economic impact of

$4,951,755,500

in the Fort Myers area.

An increase of **17.3%**

VISITORS

The Fort Myers area attracted

3,199,500

visitors in CY 2024.

An increase of **15.5%**

ROOM NIGHTS

The Fort Myers area visitors generated

4,405,000

room nights in paid accommodations in CY 2024.

An increase of **15.1%**

TOURIST DEVELOPMENT TAX

Paid accommodations and vacation rentals by visitors to the Fort Myers area in CY 2024 generated

$43,861,100

in TDT collected.

An increase of 17.8%

JOBS & WAGES

Tourism in the Fort Myers area supported

42,150 (+12.2%)

local jobs in CY 2024, generating

$1,601,256,400 (+15.0%)

in wages and salaries.

VISITORS SUPPORT JOBS

An additional Lee County job
is supported by every

76

visitors

HOUSEHOLD SAVINGS[1]

Visitors to the Fort Myers area
saved local residents

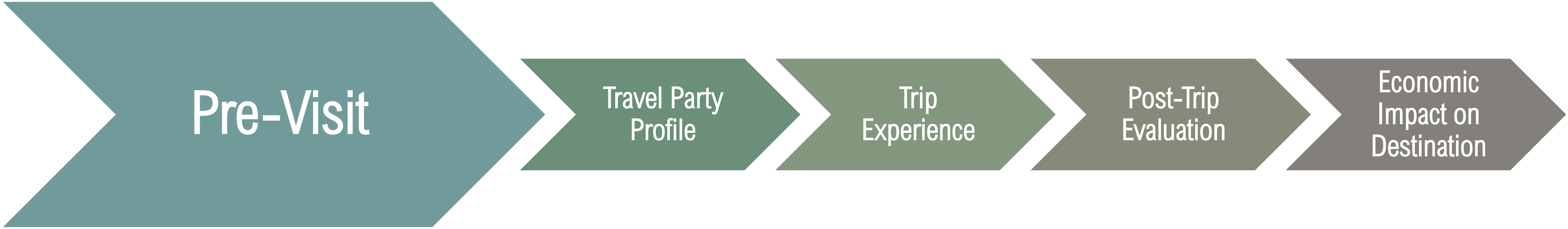
$1,049

per household in CY 2024
in state and local taxes.

CALENDAR YEAR LODGING STATISTICS

58.8%	$178.86	$105.22
Occupancy	ADR	RevPAR
↑ 3.6%	↑ 6.8%	↑ 10.6%

VISITOR JOURNEY: PRE-VISIT



TRIP PLANNING

- → Nearly 2 in 5 visitors planned their trip to the Fort Myers area 1-2 months in advance
- → 3 in 10 visitors requested information from local organizations to plan their trip
  - → Over 1 in 5 visitors called a hotel, motel, or condo directly while planning their trip
- → 30% of visitors considered choosing other destinations while planning their trip

TRIP PLANNING: TOP WEBSITES USED

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

33% Airline websites

28% Search engines

21% Airbnb, Vrbo, etc.

[1]Multiple responses permitted.

TOP TRIP INFLUENCERS

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

88% Warm weather

87% Peaceful/relaxing

83% 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]:

45% Relax & unwind

38% Beach

34% Visiting friends/relatives

[1]Three responses permitted.

PROMOTIONS

- 38% of visitors recalled promotions within the 6 months prior to their visit to the Fort Myers area
- Promotions influenced 20% of all visitors to come to the Fort Myers area
- Top sources of recall include[1]:

48%[2] Internet

35%[2] Social media

[1] Multiple responses permitted.
[2] Base = 38%.

BOOKING

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

41% Directly with hotel/condo

17% Other online travel agency

17% Airbnb

14% Vrbo

7% Vacation rental company

TRANSPORTATION

- 69% of visitors flew to the Fort Myers area
- 56% of all visitors traveled to the Fort Myers area via RSW

VISITOR JOURNEY: TRAVEL PARTY PROFILE

Pre-Visit

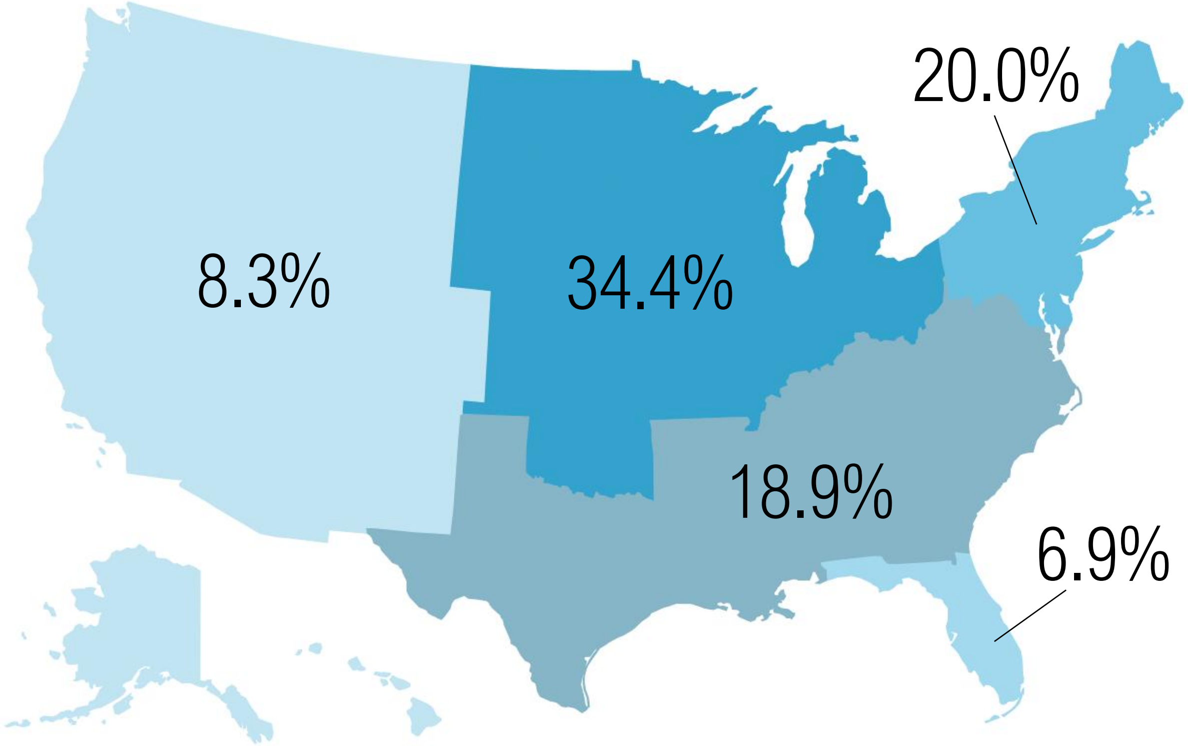
Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

ORIGIN REGION[1]



US = 88.5%

Canada – 6.2%

Germany – 2.1%

3.2% Other International Markets
(United Kingdom, Other Europe, etc.)

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

TOP ORIGIN MARKETS[1]

5% Chicago

5% New York

5% Minneapolis-St. Paul

4% Atlanta

3% Detroit

3% Boston

3% Philadelphia

[1]Sources: Data from Visitor Tracking Survey

TRAVEL PARTY SIZE AND COMPOSITION

- Visitors traveled in a party composed of 2.9 people[1]
- 33% traveled with children under the age of 18
- 40% traveled as a family

[1]Source: Visitor Tracking Survey, includes all types of visitors

DEMOGRAPHIC PROFILE

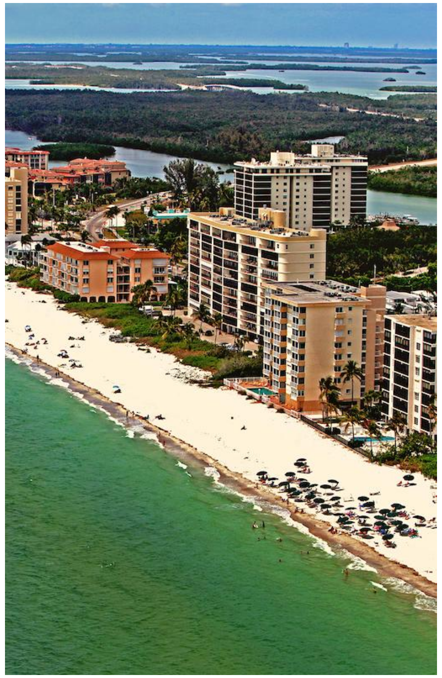
CY 2024 Visitors:

- Median age of 51 years old
- Median household income of $107,600
- Married (77%)
- College educated (69%)
- Caucasian/white (80%)

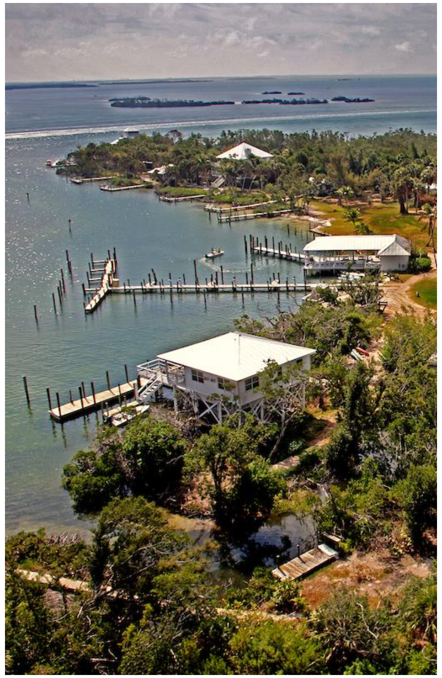
Visitor Journey: Trip Experience

ACCOMMODATIONS

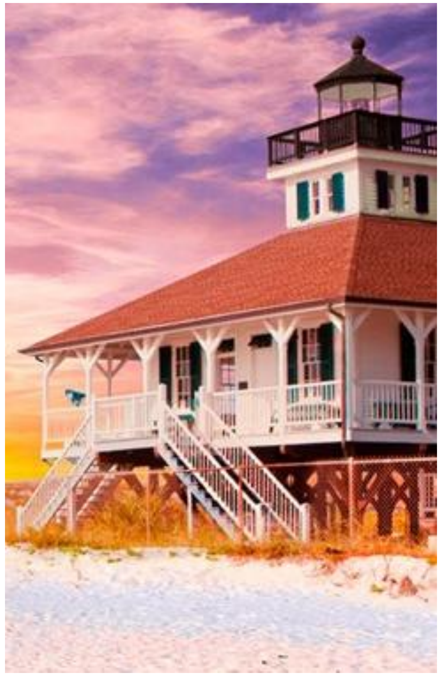
35% Hotel/Motel/Resort/B&B



26% Condo/Vacation Rental



17% Personal Condo/2nd Home



15% Friends/Family Home

LENGTH OF STAY & NUMBER OF TIMES IN DESTINATION

- Visitors[1] spent **6.4 nights** in the Fort Myers area
- **25%** were **first time** visitors
- **21%** have visited **more than 10 times**

[1]Source: Visitor Tracking Survey, includes all types of visitors

VISITOR ACTIVITIES

- Top visitor activities include[1]:

67% Relax & unwind

63% Dining

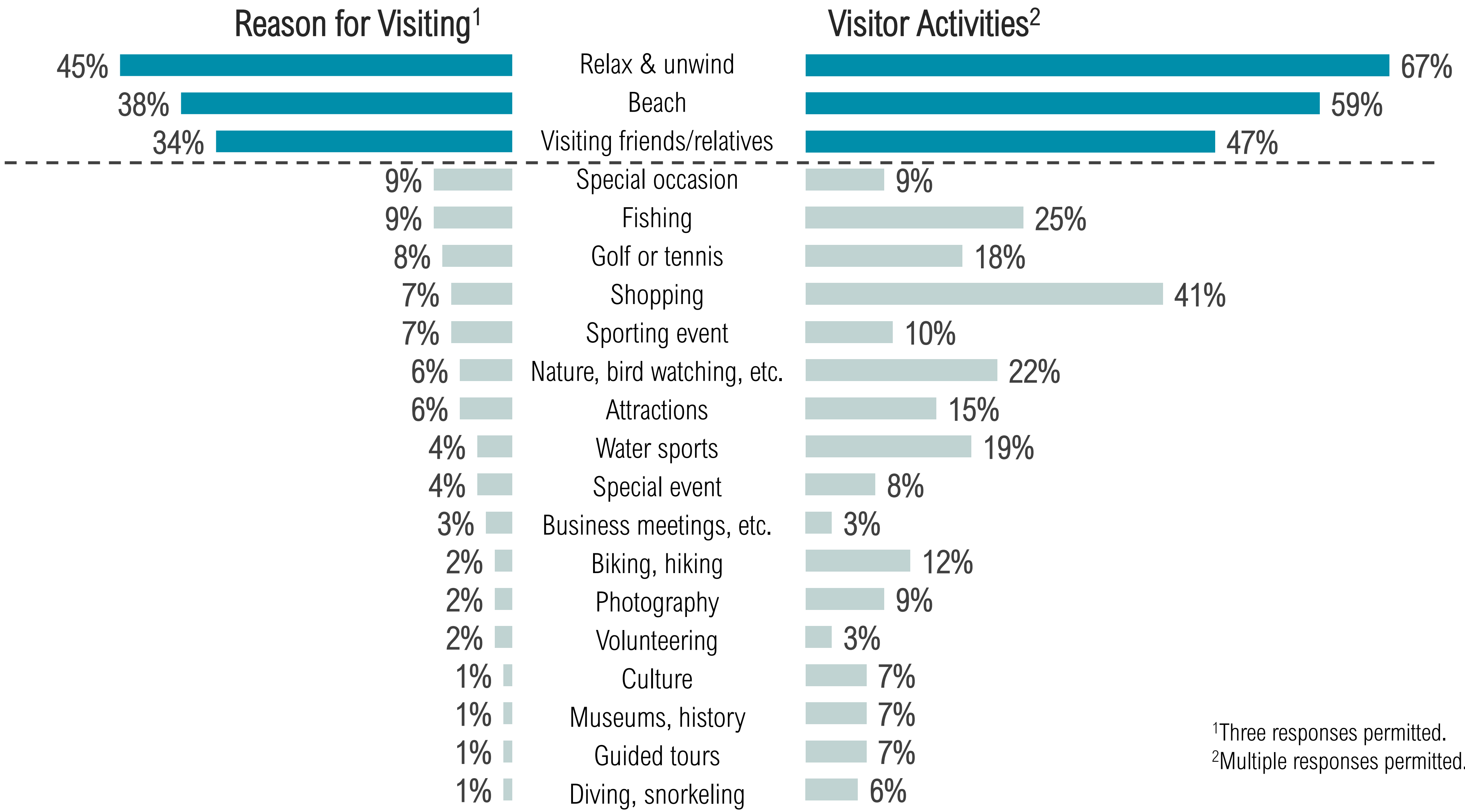
59% Beaches

[1]Multiple responses permitted.

REASON FOR VISITING VS. VISITOR ACTIVITIES

Key Reasons for Visiting

Trip Enhancements



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

TOP COMMUNITIES STAYED

34% Fort Myers

18% Cape Coral

12% Fort Myers Beach

9% Bonita Springs

VISITOR JOURNEY: POST-TRIP EVALUATION

SATISFACTION

- 93% of visitors are likely to recommend the area
  - 52% are very likely to recommend
- 89% of visitors are likely to return
  - 56% are very likely to return
- 73% of visitors are likely to return next year
  - 50% are very likely to return next year

SATISFACTION

- 95% of visitors were satisfied or very satisfied with their overall visit to the Fort Myers area (56% were very satisfied)
- 93% of visitors were satisfied or very satisfied with customer service on their visit (56% were very satisfied)
- 43% of visitors said paid accommodations exceeded their expectations (96% met or exceeded expectations)

TOP ATTRIBUTE RATINGS

→Visitors gave the highest ratings to the following destination attributes[1] of the Fort Myers area:

94% Warm weather

93% Peaceful/relaxing

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.

VACATION ATTRIBUTE INFLUENCE VS. RATINGS

Vacation Influencers[1]	Attribute	Fort Myers Area Ratings[2]	GAP %[3]
88%	Warm weather	94%	+6%
87%	Peaceful/relaxing	93%	+6%
83%	A safe destination	91%	+8%
80%	White sandy beaches	88%	+8%
77%	Plenty to see and do	85%	+8%
76%	Convenient location	82%	+6%
75%	Clean, unspoiled environment	80%	+5%
74%	A "family" atmosphere	86%	+12%
70%	Value for your travel dollar	77%	+7%
68%	Memories of visiting/nostalgia	76%	+8%
63%	Reasonably priced lodging	68%	+5%

[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.
[3]Gap is the difference between Fort Myers Area Ratings and the score for Vacation Influencers. A positive GAP is preferred.

VISITOR CONCERNS

- Over 1 in 3 visitors expressed concern about the traffic they experienced in the Fort Myers area during their trip
- Nearly 1 in 5 were concerned about damaged buildings or about high prices
- 23% of visitors had no concerns about the destination

AREA DESCRIPTIONS

Warm Weather

"The perfect vacation! Gorgeous tropical environment and setting with near perfect weather during our stay. Warm days, cool nights, plenty of sunshine, and great restaurants and shopping too!"

Peaceful & Relaxing

"Resort was peaceful and relaxing. Great place to chill and unwind."

Safe Destination

"It's a very safe area with tons of activities for families with kids."

Detailed Findings

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

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

TOURISM SNAPSHOT: CALENDAR YEAR 2024

Visitor & Lodging Statistics	2023[5]	2024	% Change
Visitors	2,771,200	3,199,500	+ 15.5%
Visitor Days[1]	17,576,800	20,420,100	+ 16.2%
Room Nights	3,826,800	4,405,000	+ 15.1%
Direct Expenditures[2]	$2,636,829,100	$3,108,446,700	+ 17.9%
Total Economic Impact[3,4]	$4,221,563,400	$4,951,755,500	+ 17.3%
TDT Collections	$37,247,400	$43,861,100	+ 17.8%

[1] Visitor Days reflect the total amount of days that visitors spent in the destination including all visitor types and not just those who stayed in paid accommodations.

[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] The IMPLAN multiplier used to estimate economic impact is 1.593.

[5] 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.

JOBS, WAGES, AND TAXES SUPPORTED BY TOURISM

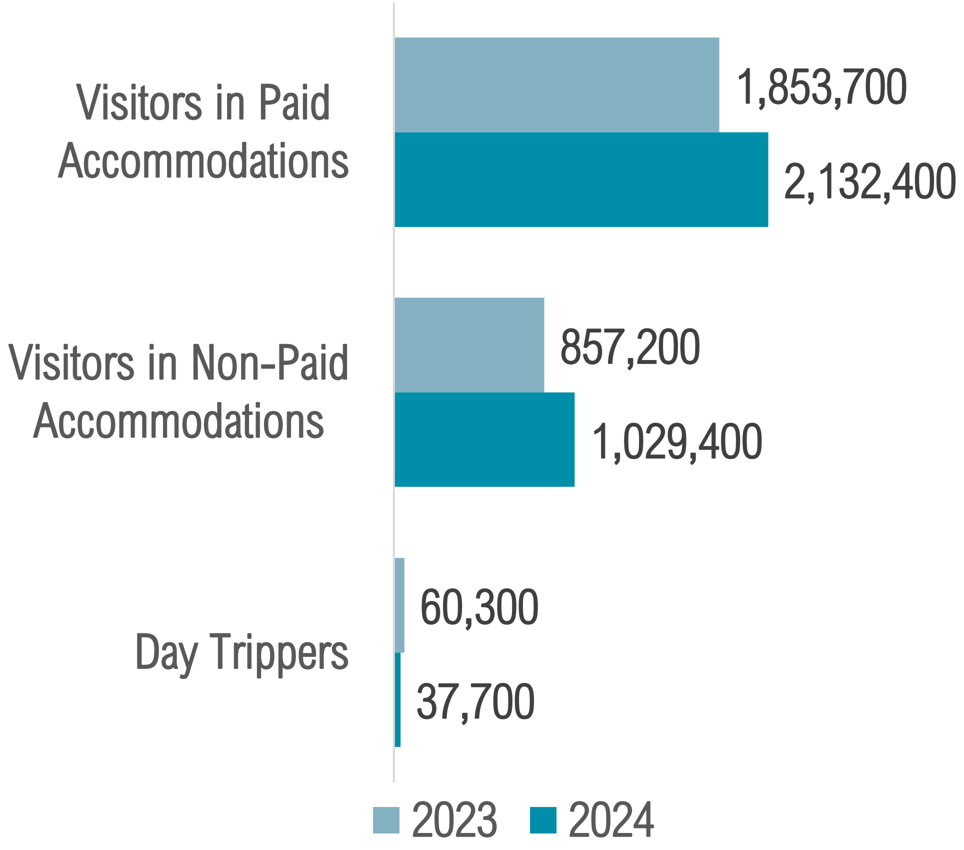
Jobs, Wages, and Taxes Supported	2023[2]	2024	% Change
Direct Jobs	28,070	31,460	+ 12.1%
Total Jobs[1]	37,570	42,150	+ 12.2%
Direct Wages	$972,116,900	$1,126,017,400	+ 15.8%
Total Wages[1]	$1,391,803,900	$1,601,256,400	+ 15.0%
Visitors per Job Supported	74	76	-
Household Savings on Taxes	$851	$1,049	+ 23.3%

[1] "Total wages" and "total taxes" are greater than "direct wages" and "direct taxes" because visitors direct spending is recirculated throughout the Lee County economy as employees and employers buy products and services with visitors' dollars.

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

NUMBER OF VISITORS

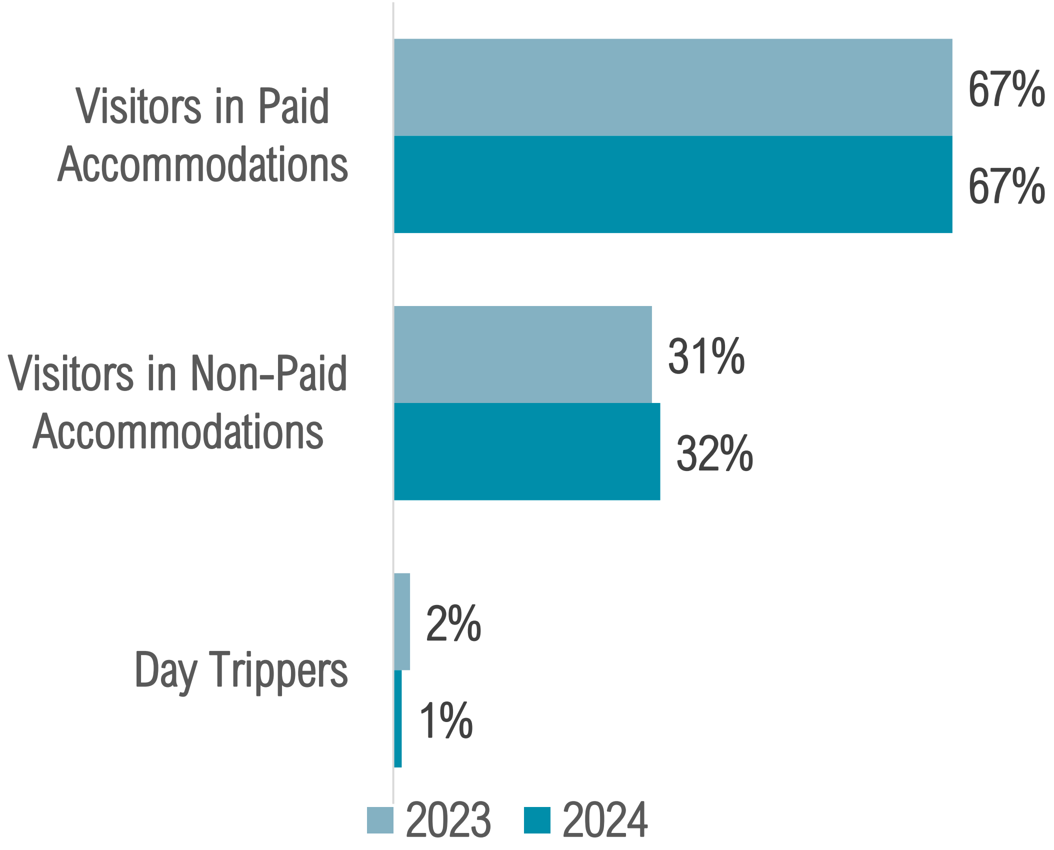
There were 3,199,500[1] visitors to the Fort Myers area in 2024 (+15.5% from 2023).



[1]Sources: Visitor Tracking Study & Occupancy Survey

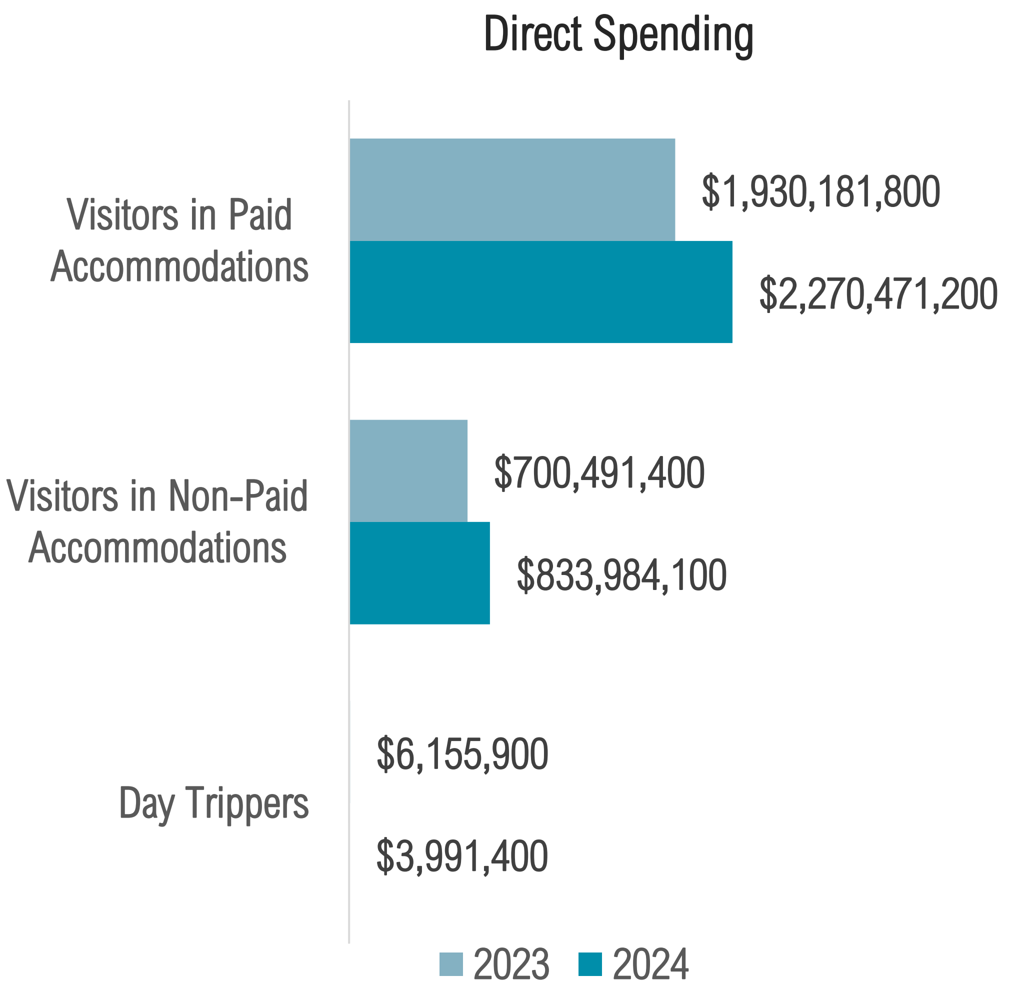
VISITOR TYPE

Visitors staying in **paid accommodations** accounted for **2 in 3** visitors in 2024.



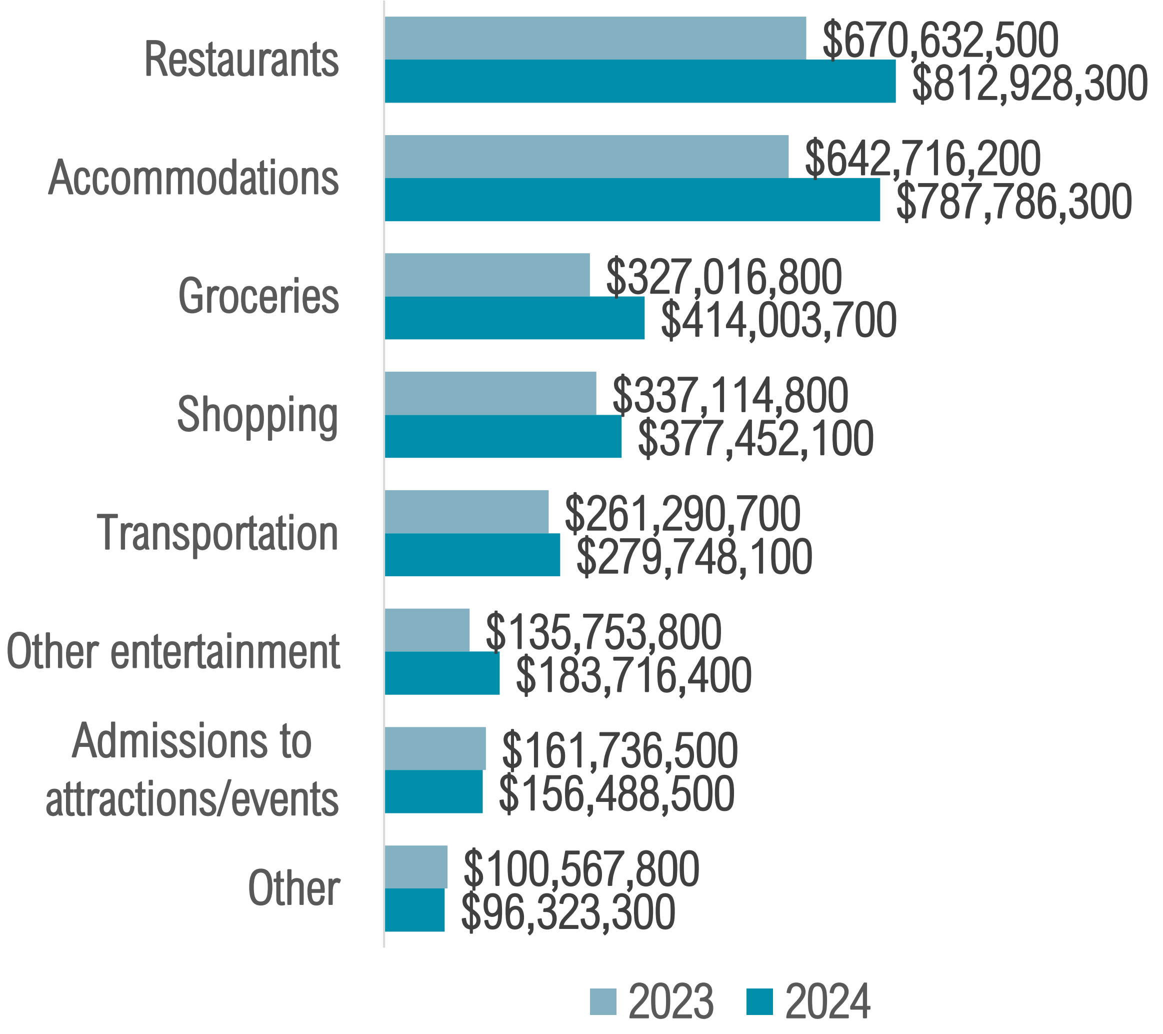
VISITOR EXPENDITURES BY VISITOR TYPE

2024 visitors spent $3,108,446,700 in the Fort Myers area, resulting in a total economic impact of $4,951,755,500, up 17.9% and 17.3% from 2023, respectively.



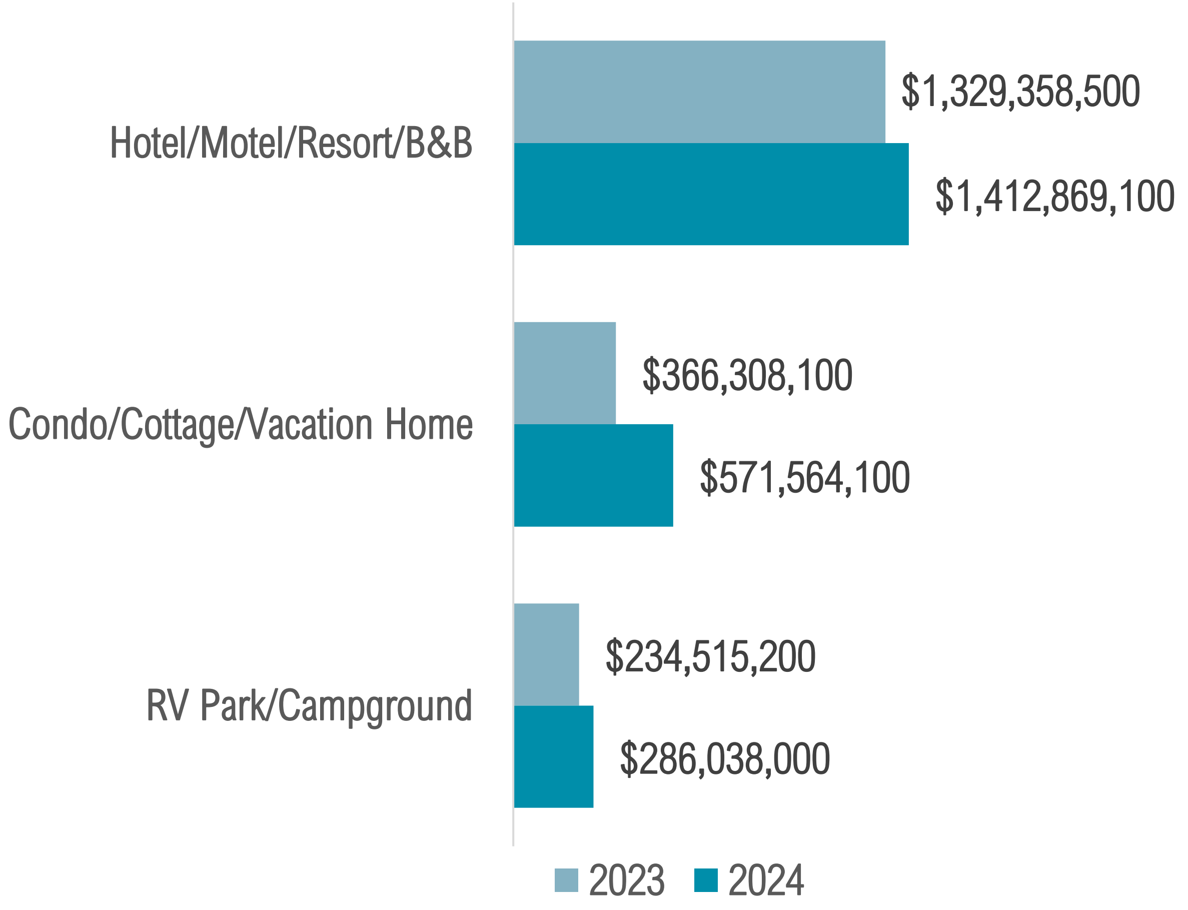
VISITOR EXPENDITURES BY SPENDING CATEGORY

Visitor spending on **accommodations** accounted for **25%** of total visitor spending in 2024.



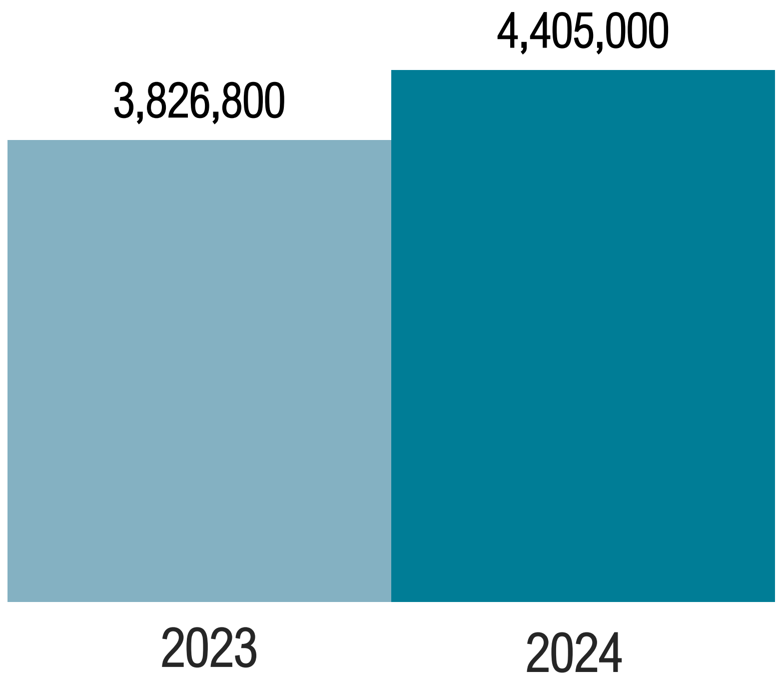
VISITOR EXPENDITURES BY LODGING TYPE

2024 visitors staying in **paid accommodations** spent **$2,270,471,200** in the Fort Myers area.



ROOM NIGHTS GENERATED

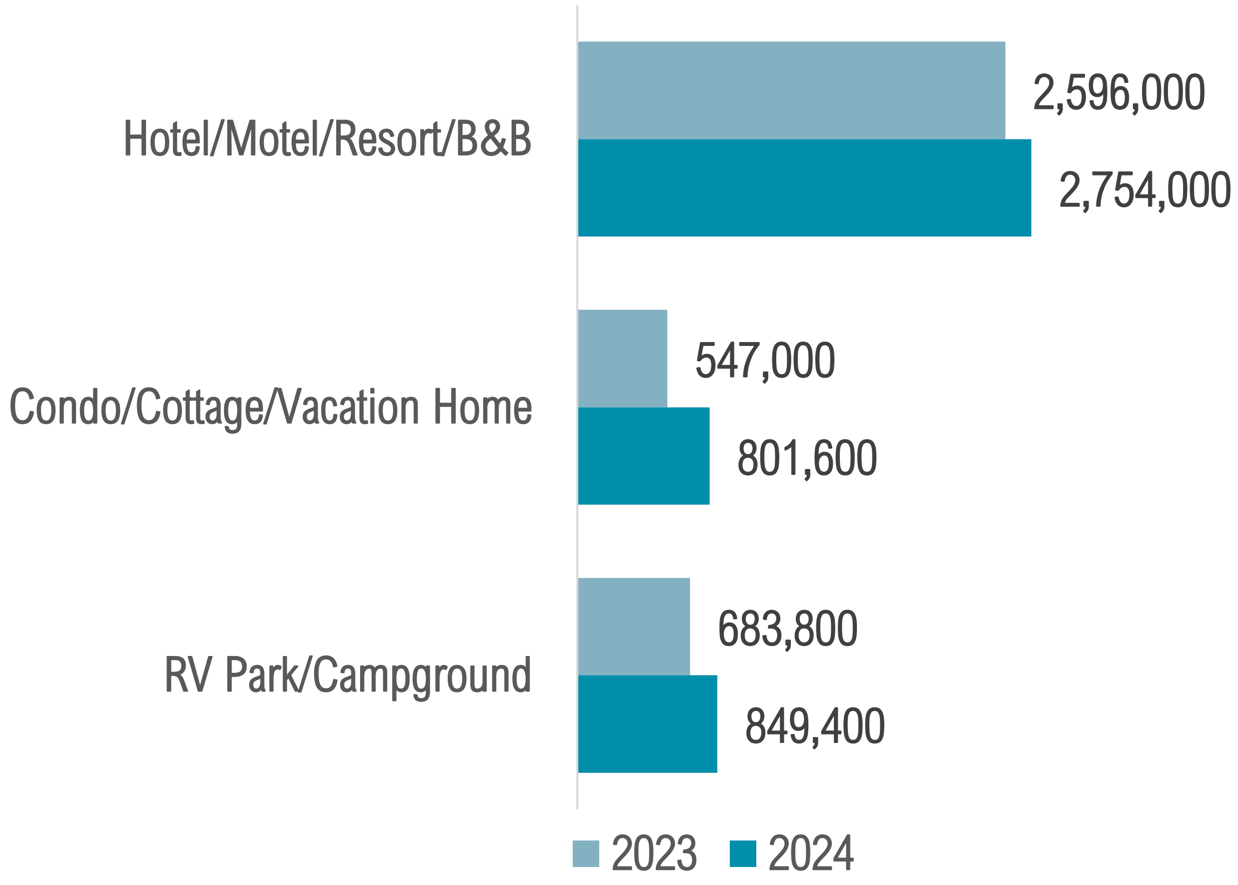
2024 visitors spent **4,405,000[1] nights** in the Fort Myers area. (+15.1% from 2023).



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

ROOM NIGHTS GENERATED

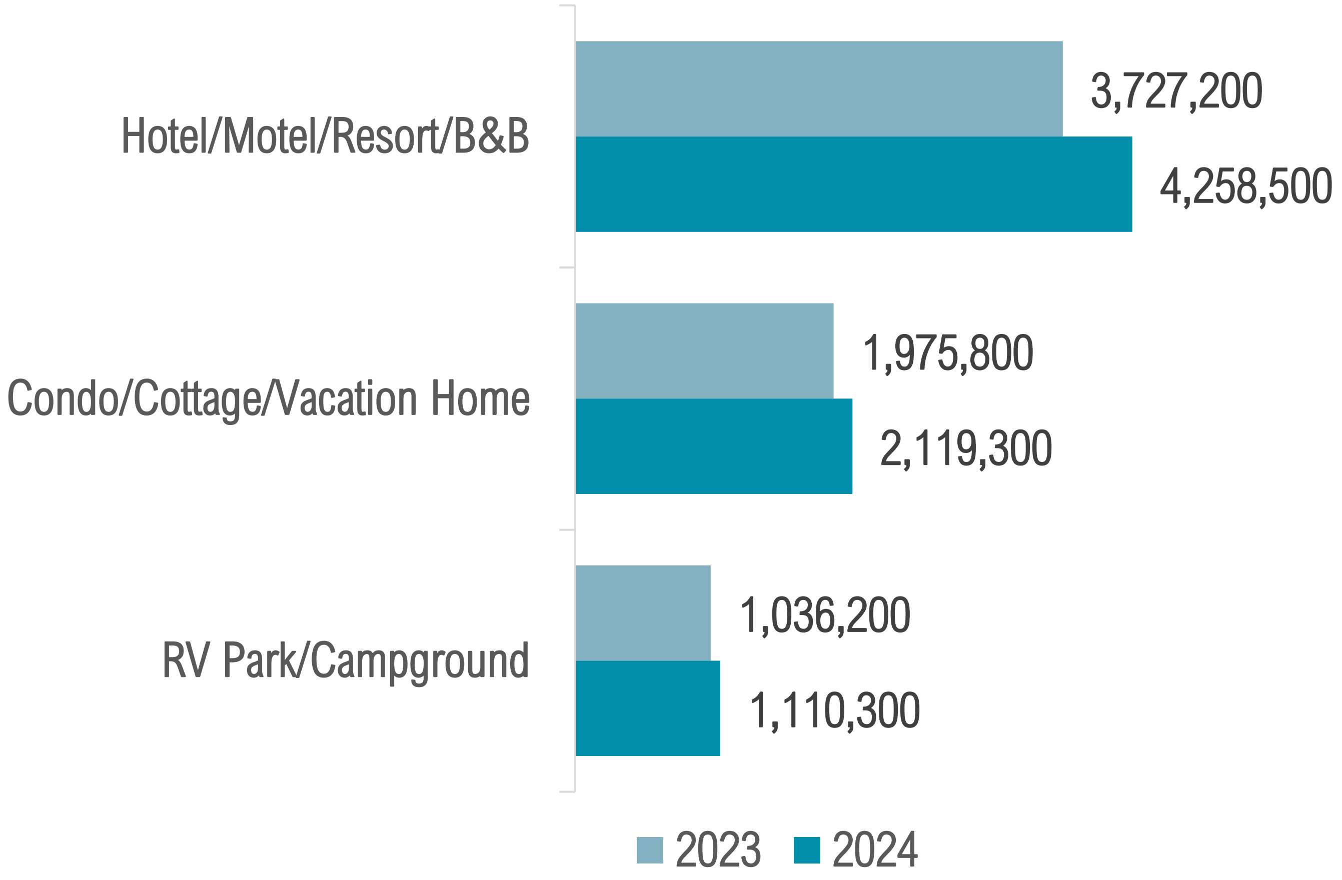
Hotels, motels, etc. accounted for **over 3 in 5** room nights generated in the Fort Myers area, while **condo, cottage, and vacation homes** and **RV parks and campgrounds** both accounted for **nearly 1 in 5** room nights each.



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

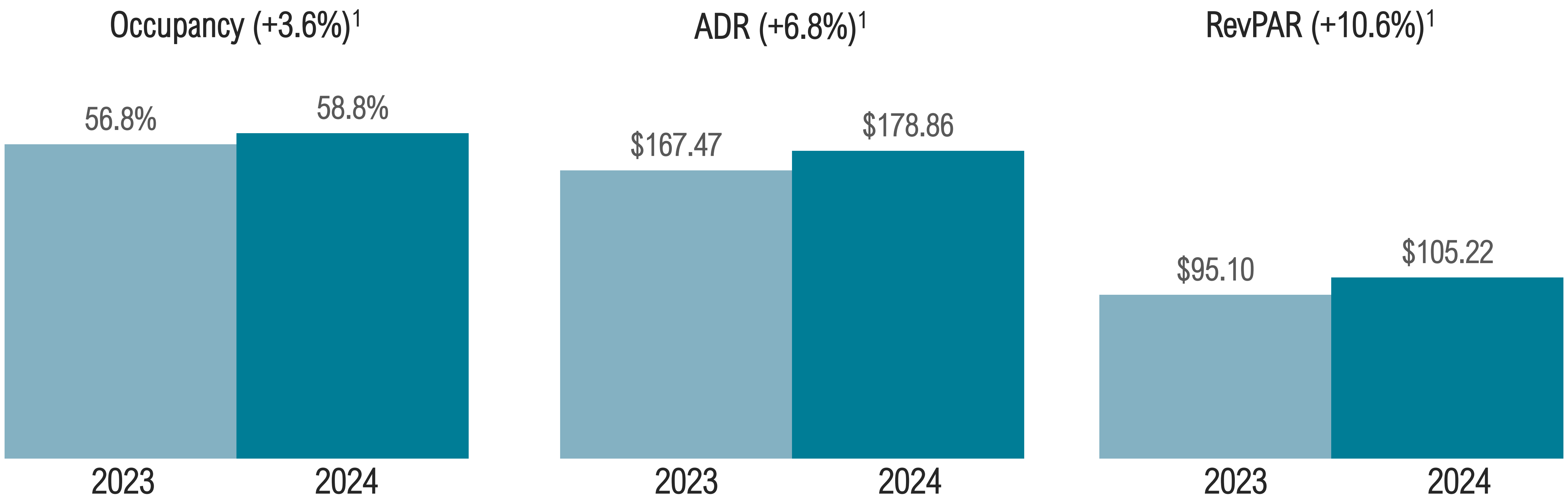
AVAILABLE ROOM NIGHTS

There were **7,488,100[1] available room nights** in 2024 vs. 6,739,200 in 2023 (+11.1%).



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

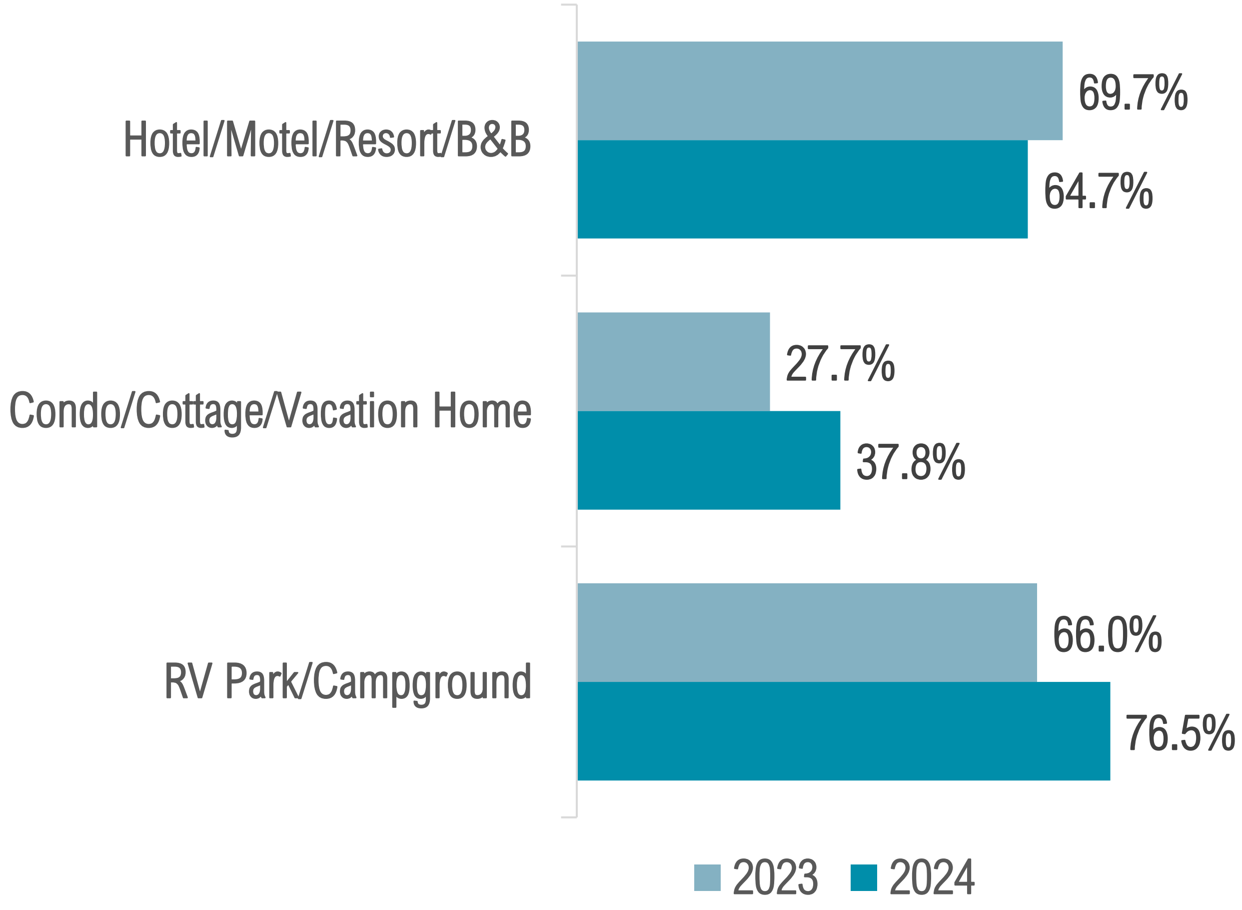
OCCUPANCY, ADR AND REVPAR



[1]Sources: Occupancy Survey, STR, & KeyData

OCCUPANCY

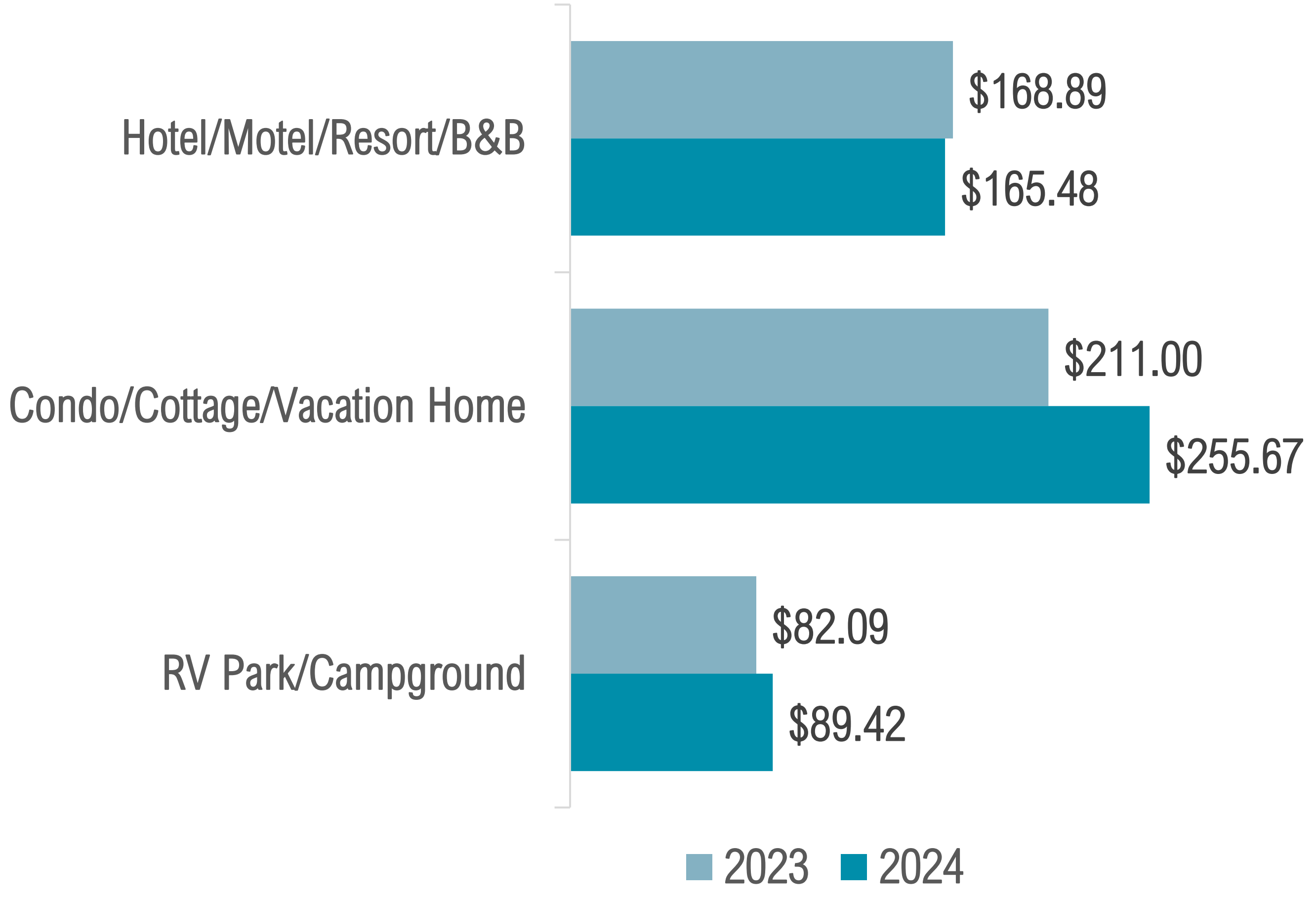
Average **occupancy** in 2024 was **58.8%**[1] (56.8% in 2023).



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

ADR

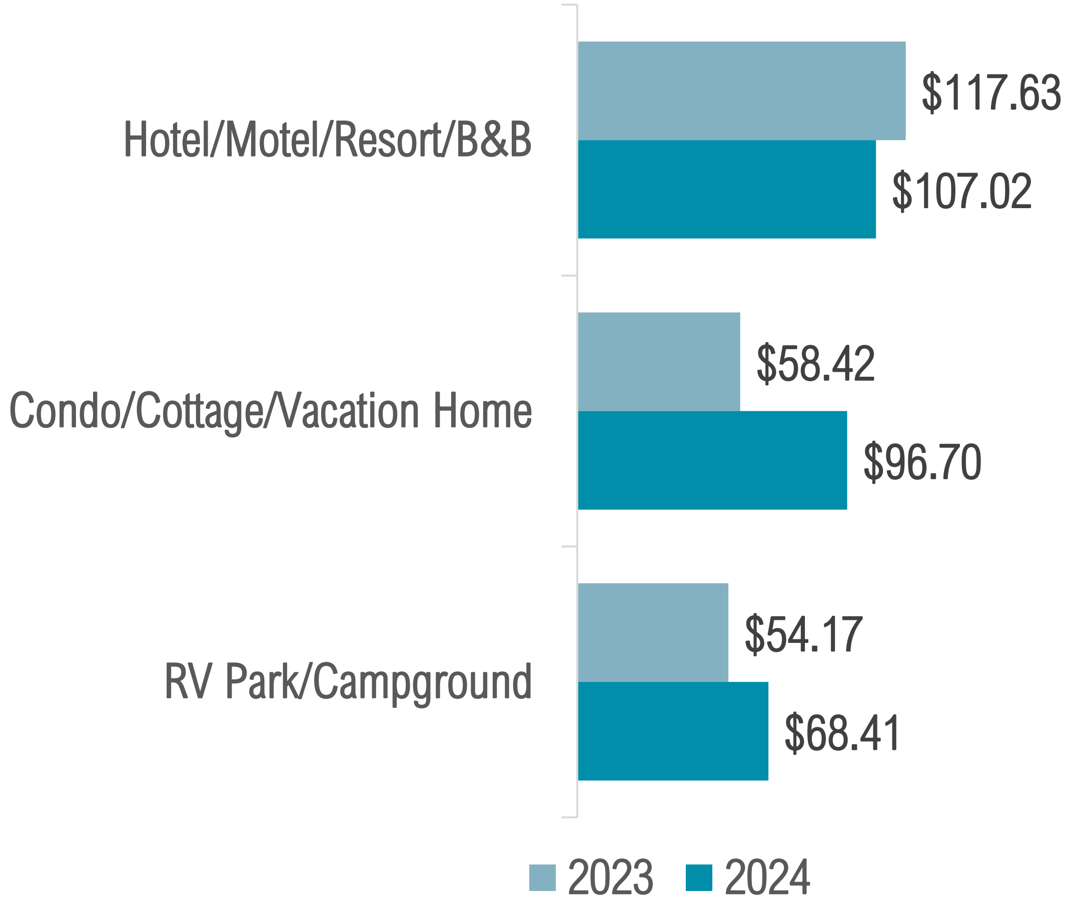
ADR in 2024 was **$178.86**[1] ($167.47 in 2023).



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

REVPAR

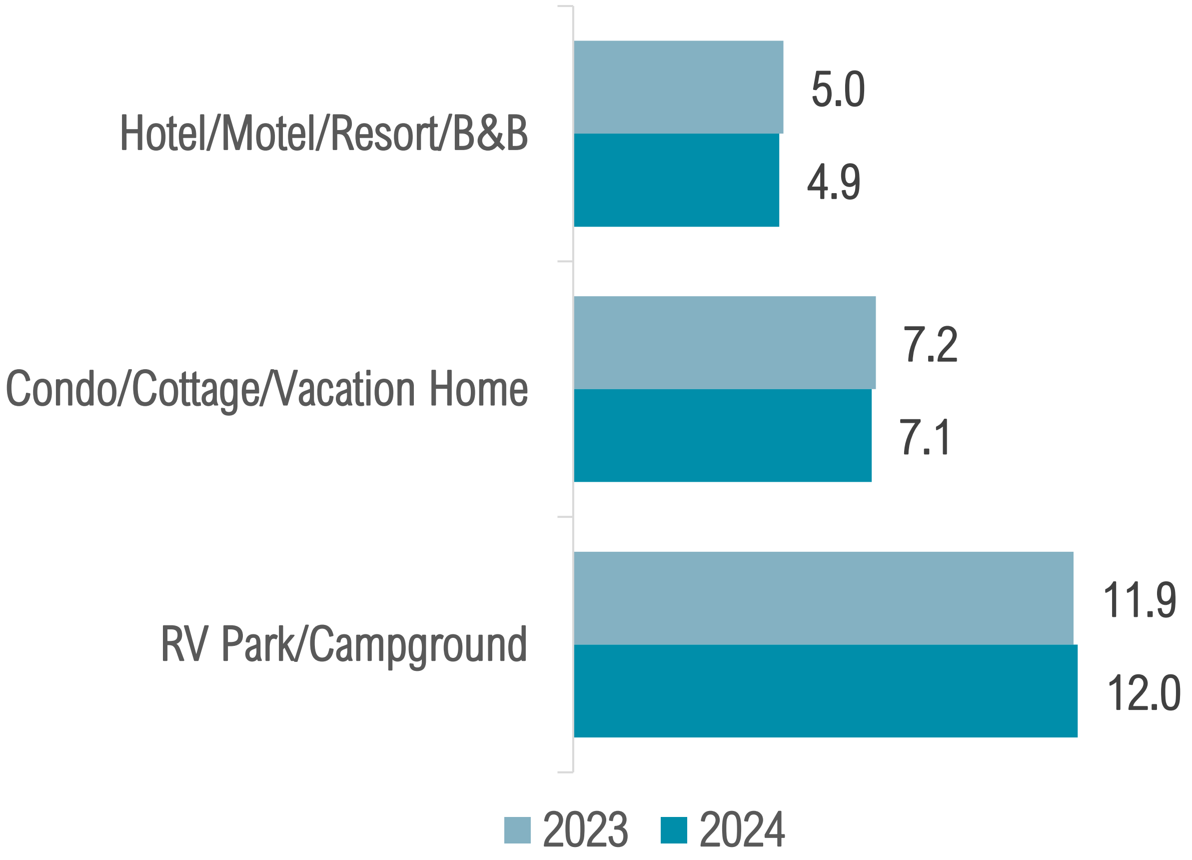
Average RevPAR in 2024 was $105.22[1] ($95.10 in 2023).



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

LENGTH OF STAY

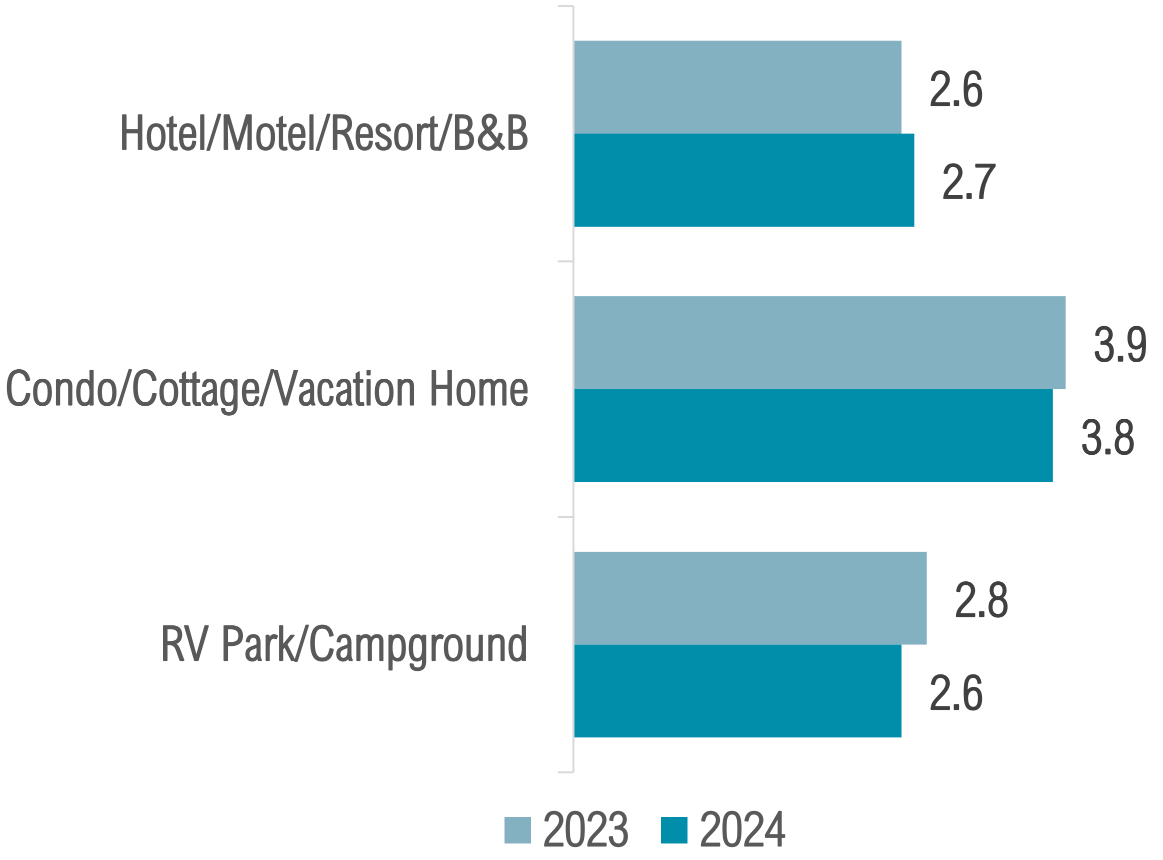
For visitors in **paid accommodations**, average length of stay in 2024 was 6.0 nights[1] (6.2 nights in 2023).



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

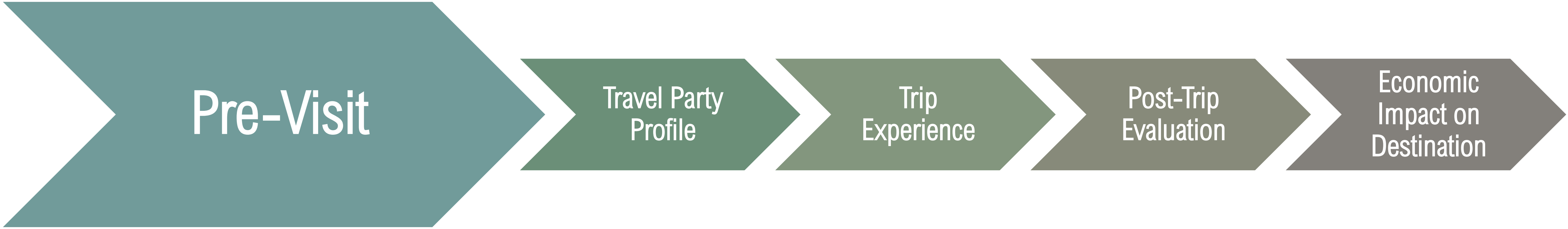
TRAVEL PARTY SIZE

For visitors in **paid accommodations**, average travel party size in 2024 was 2.9 people[1] (2.8 people in 2023).



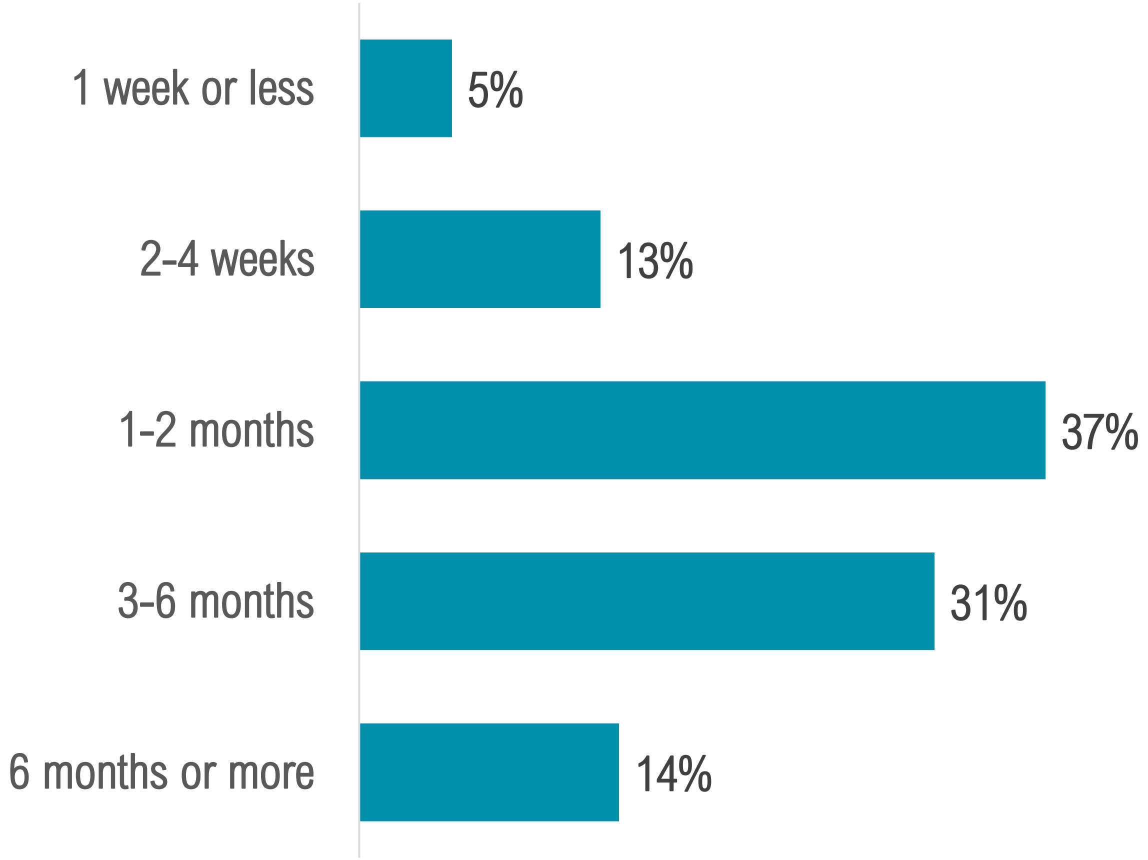
[1]Sources: Occupancy Survey, STR, and KeyData

VISITOR JOURNEY: PRE-VISIT



TRIP PLANNING CYCLE

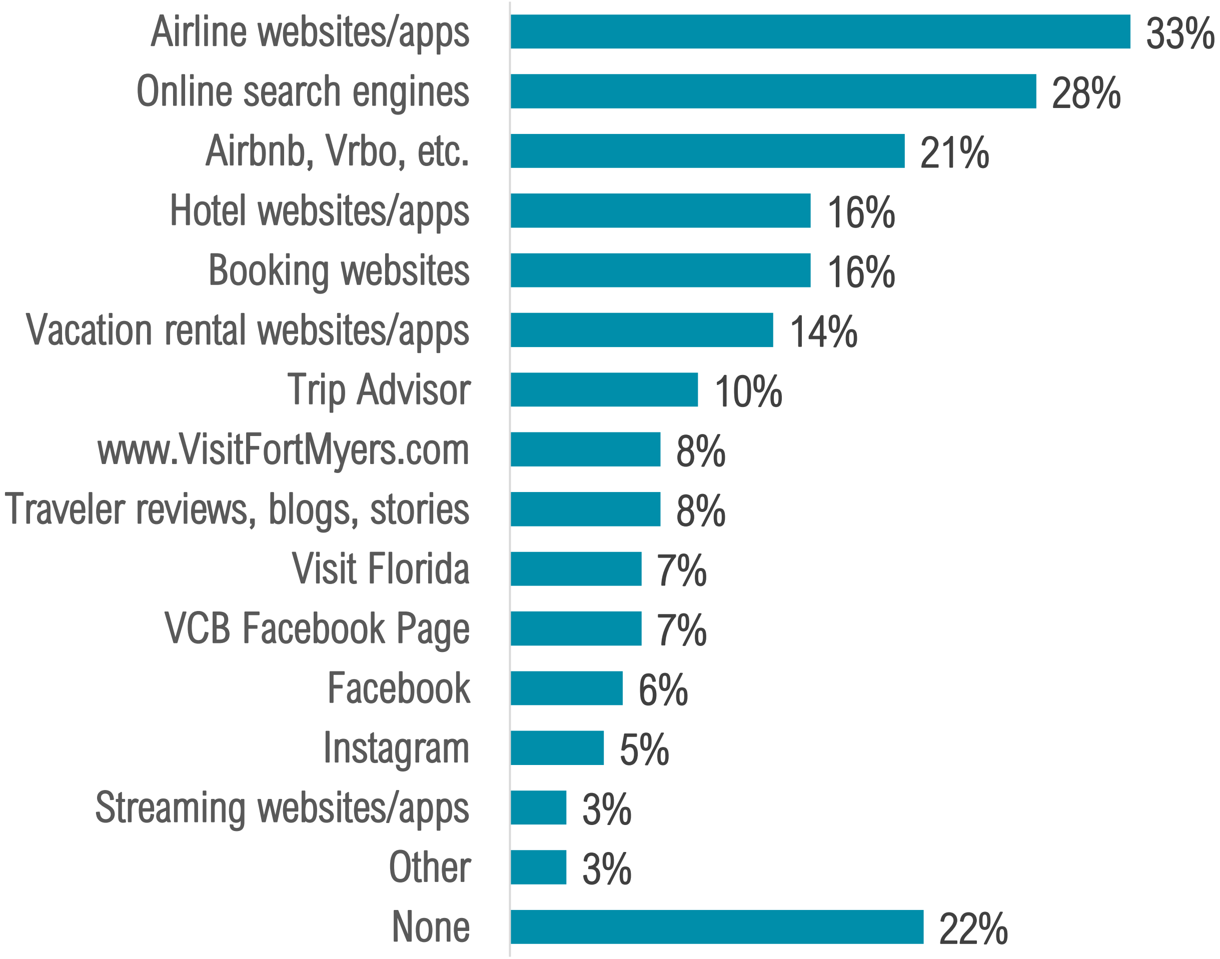
Nearly 2 in 5 visitors planned their trip 1-2 months or more in advance, while 31% planned their trip 3-6 months in advance.



TRIP PLANNING: WEBSITES USED[1]

78% of visitors used **websites** to plan their trips to the Fort Myers area.

1 in 3 visitors used **airline websites/apps** and **nearly 3 in 10** used **online search engines** to plan their trips in 2024.



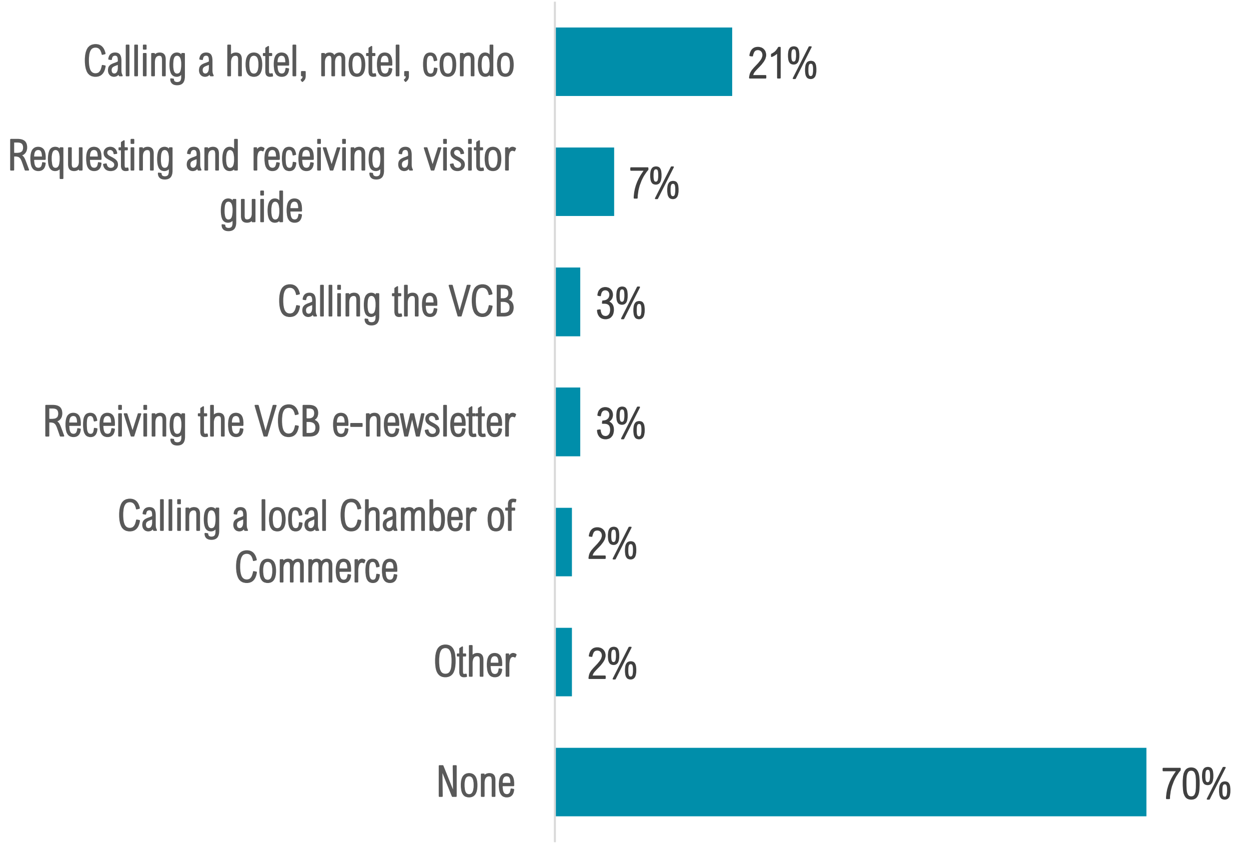
[1]Multiple responses permitted.

TRIP PLANNING: INFORMATION REQUESTS[1]

3 in 10 visitors made information requests to plan their trips to the Fort Myers area.

Visitors who sought information prior to their trips were most likely to rely on a hotel, motel, or condo.

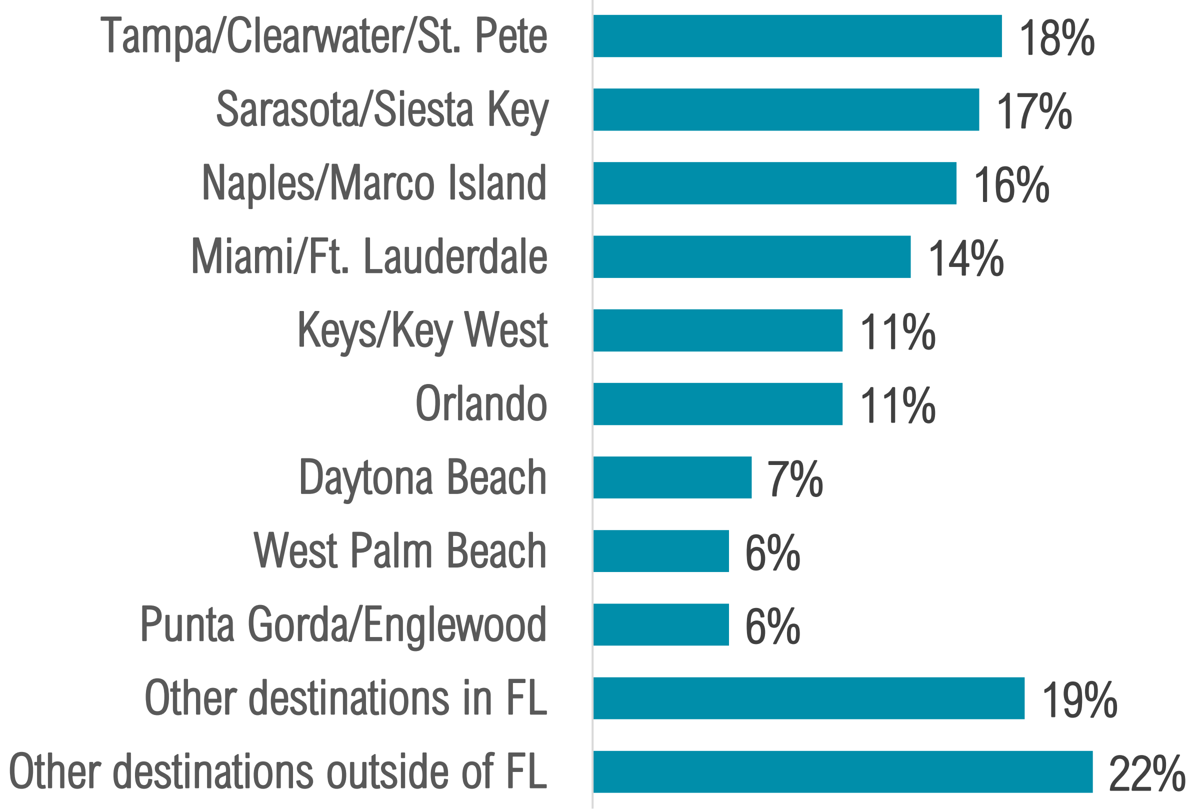
Visitors were less likely to make information requests in 2024 (-3% points).



[1]Multiple responses permitted.

TRIP PLANNING: OTHER DESTINATIONS CONSIDERED[1]

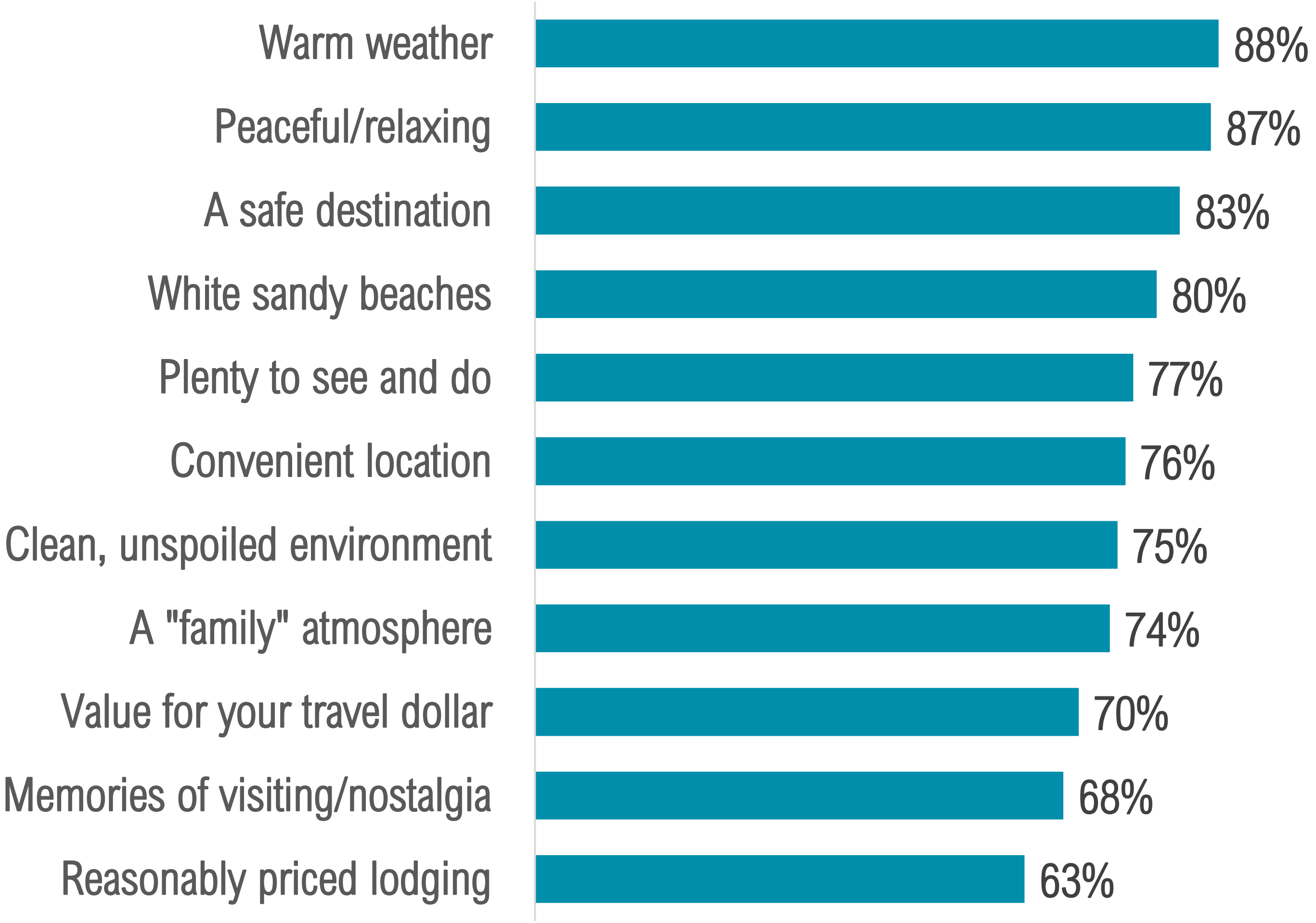
30% of visitors considered **choosing other destinations** when planning their trips.



[1]Multiple responses permitted.

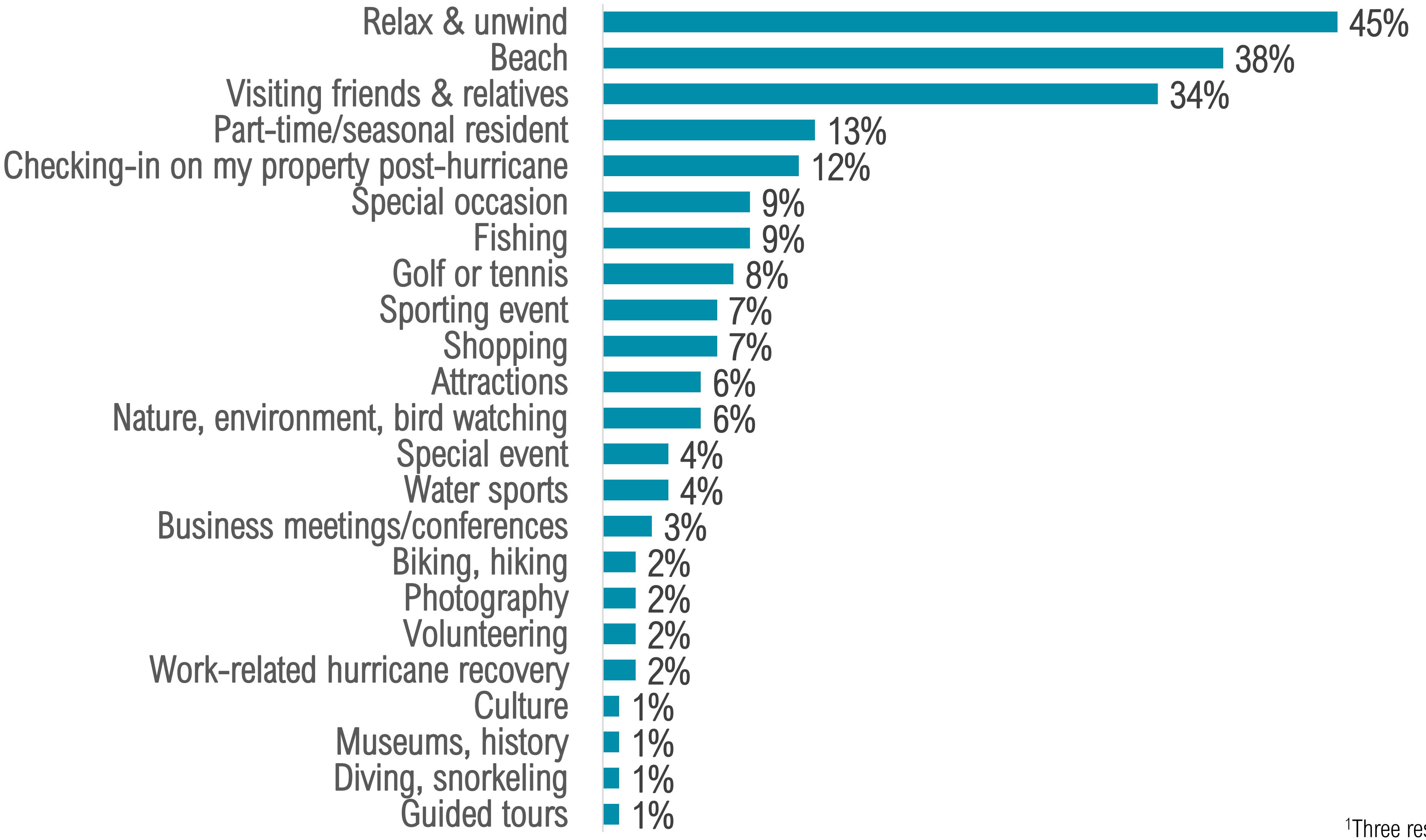
TRIP INFLUENCERS[1]

Nearly **9 in 10** visitors were heavily influenced by the Fort Myers area's **warm weather** and **peaceful/relaxing vibe** when thinking about visiting.



[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.

REASONS FOR VISITING[1]



Pre-Visit
Calendar Year 2024

[1]Three responses permitted.

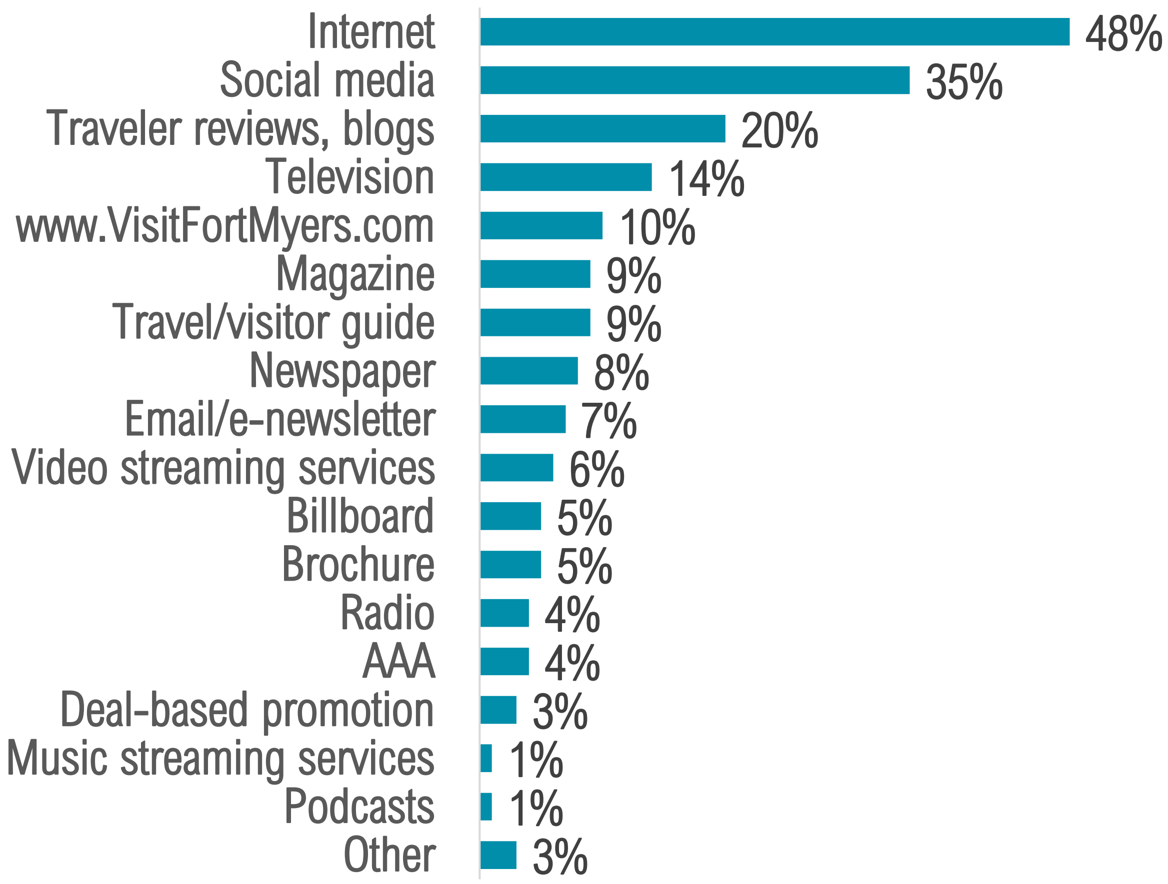
PROMOTIONS[1]

38% of visitors recalled promotions for the Fort Myers area, primarily on the Internet or social media.

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

BASE: 38% of visitors who recalled promotions

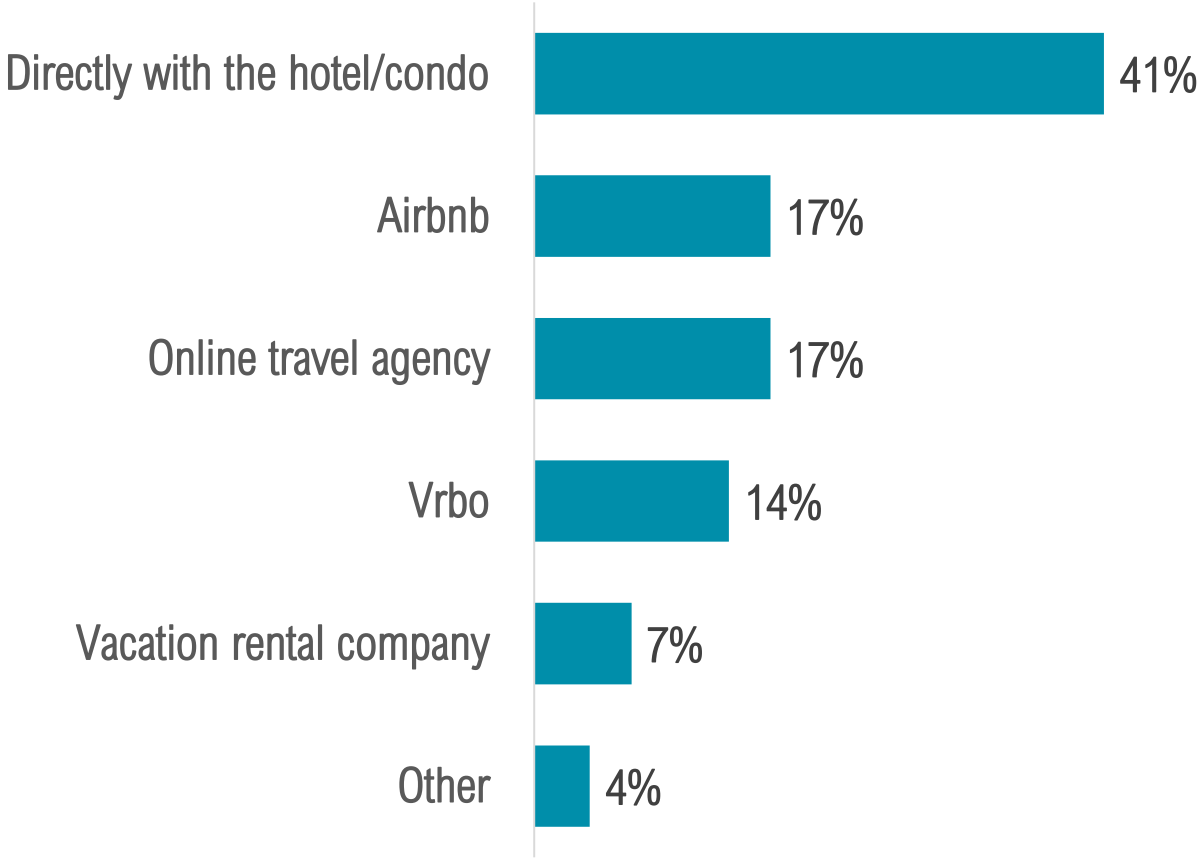
Source of Promotion



[1]Multiple responses permitted.

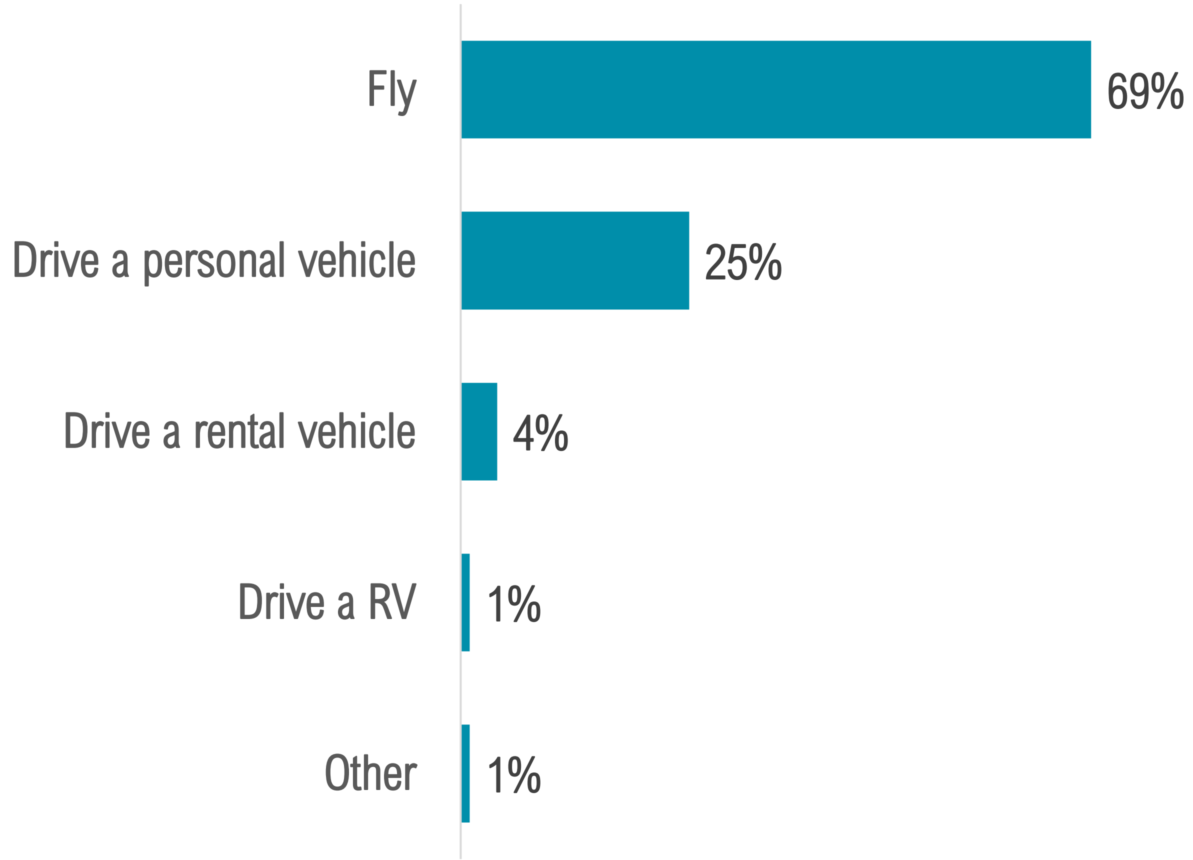
BOOKING

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



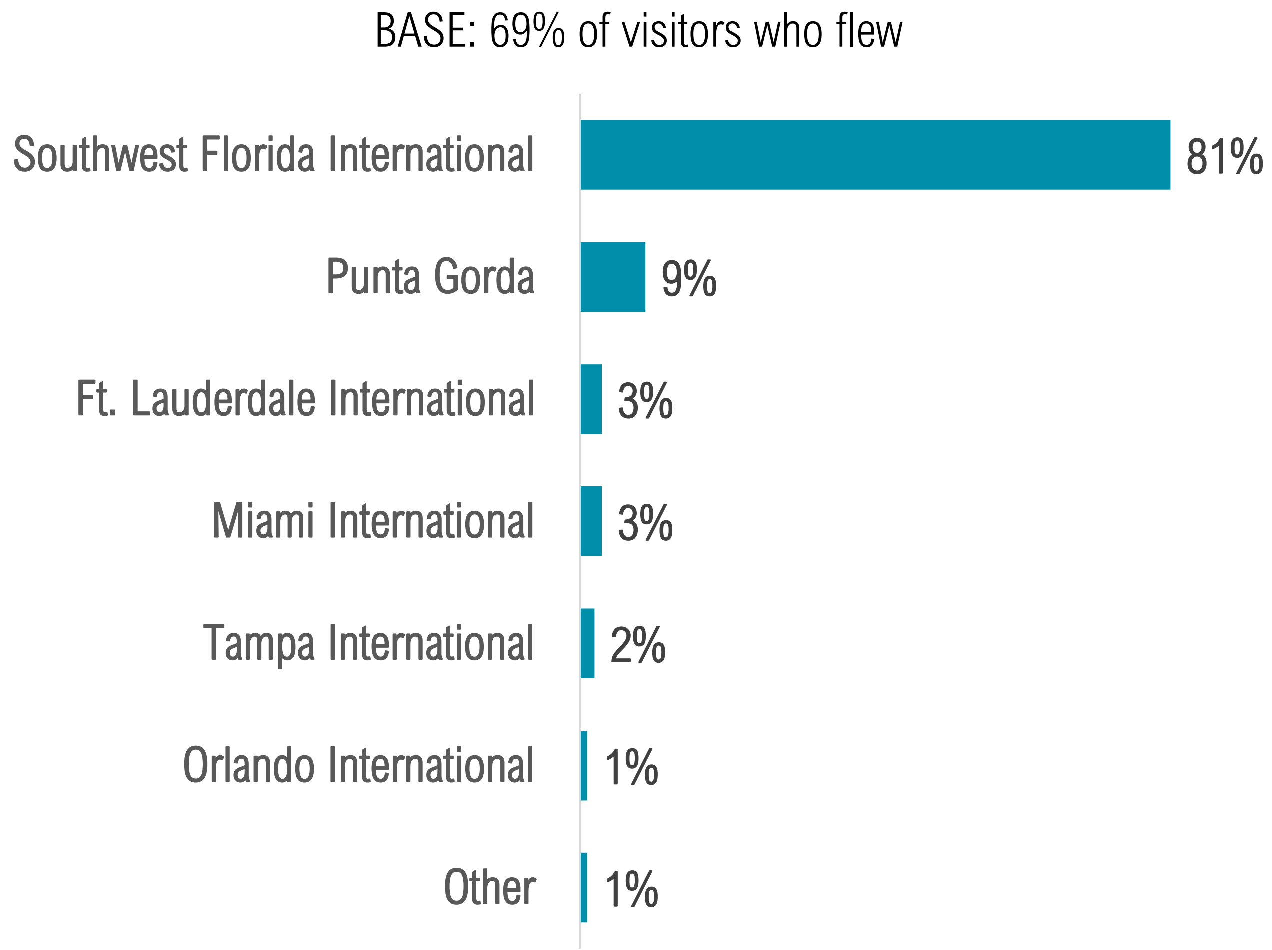
TRANSPORTATION

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



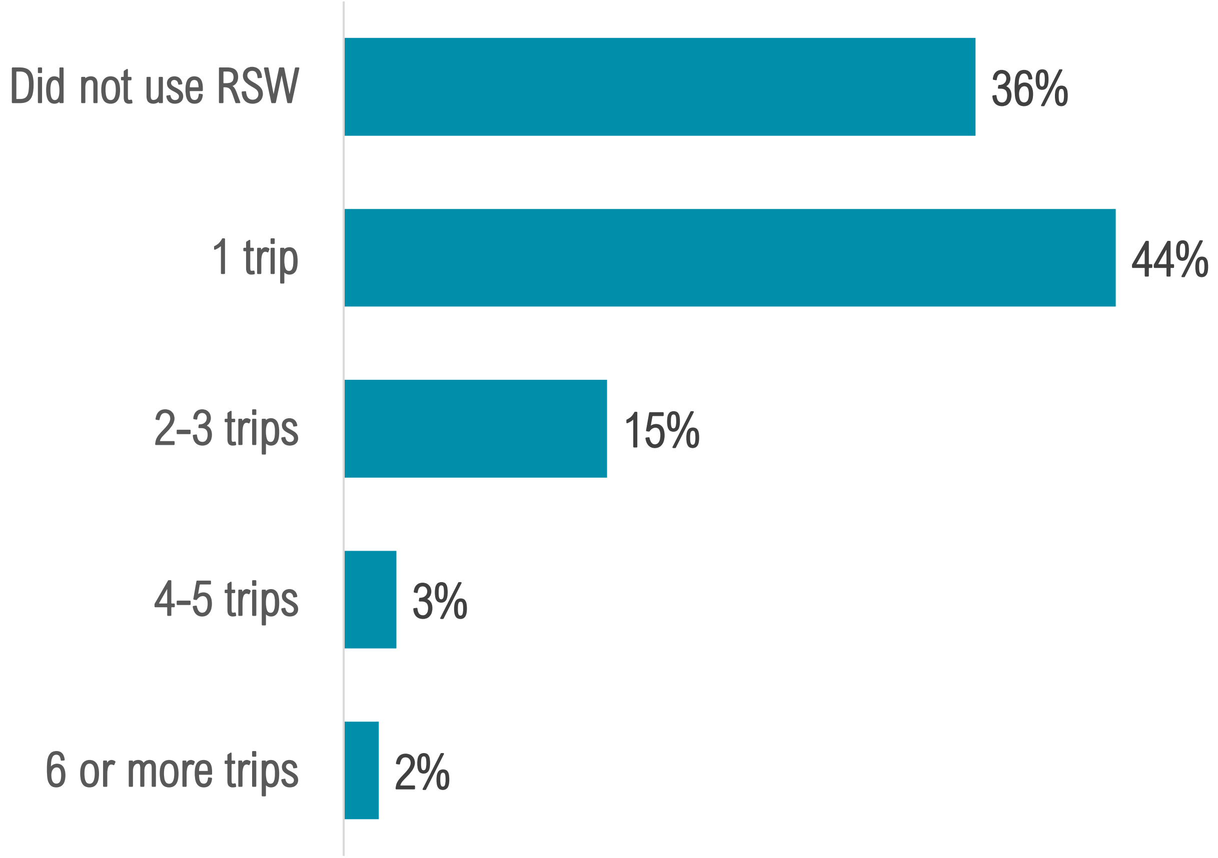
AIRPORT

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



USE OF RSW IN THE PAST YEAR

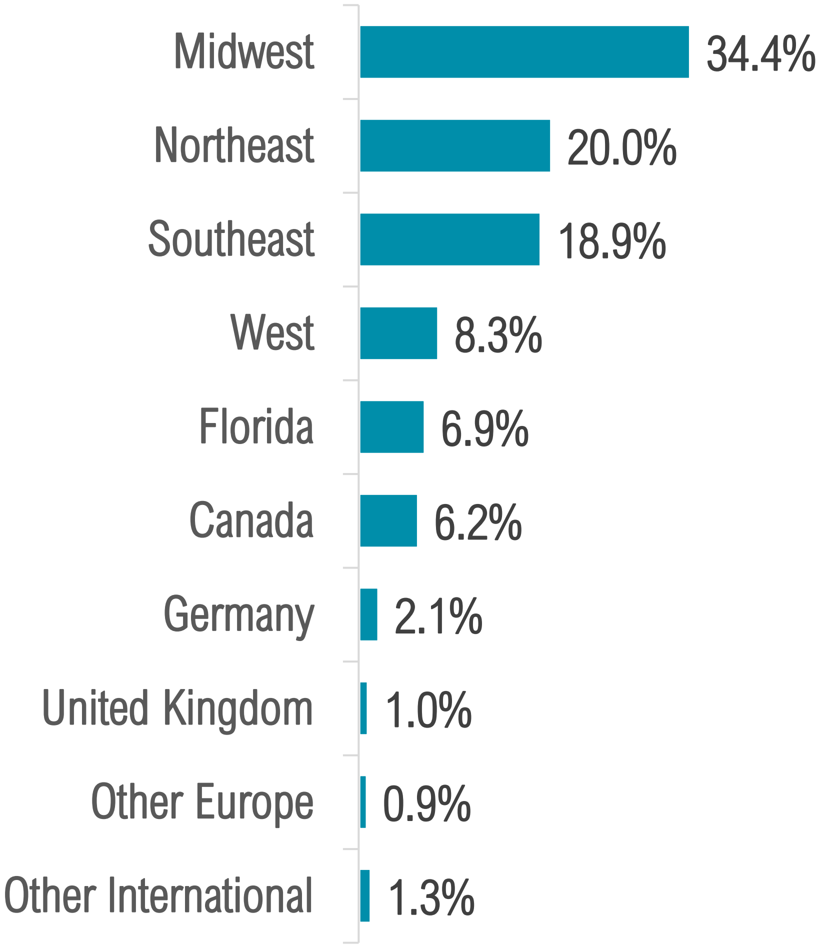
64% of visitors used RSW at least once in the past year.

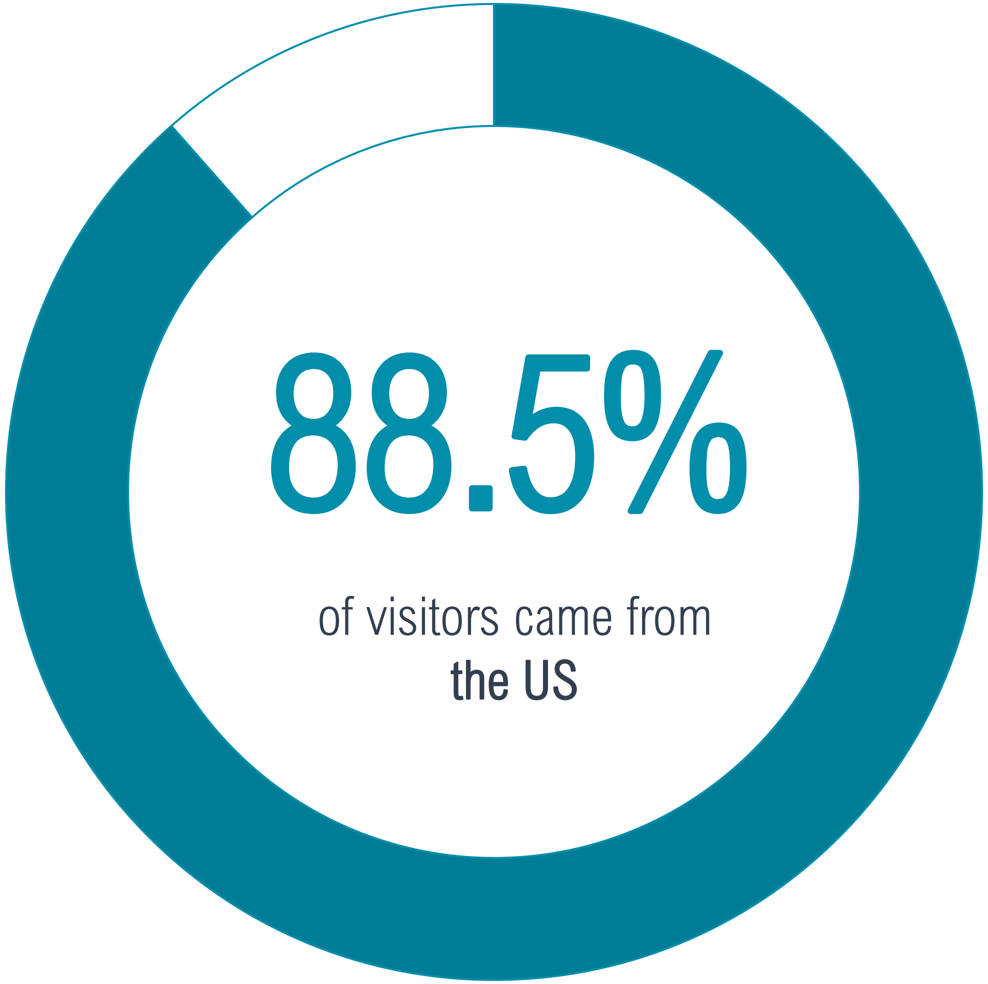


VISITOR JOURNEY: TRAVEL PARTY PROFILE

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

ORIGIN[1]

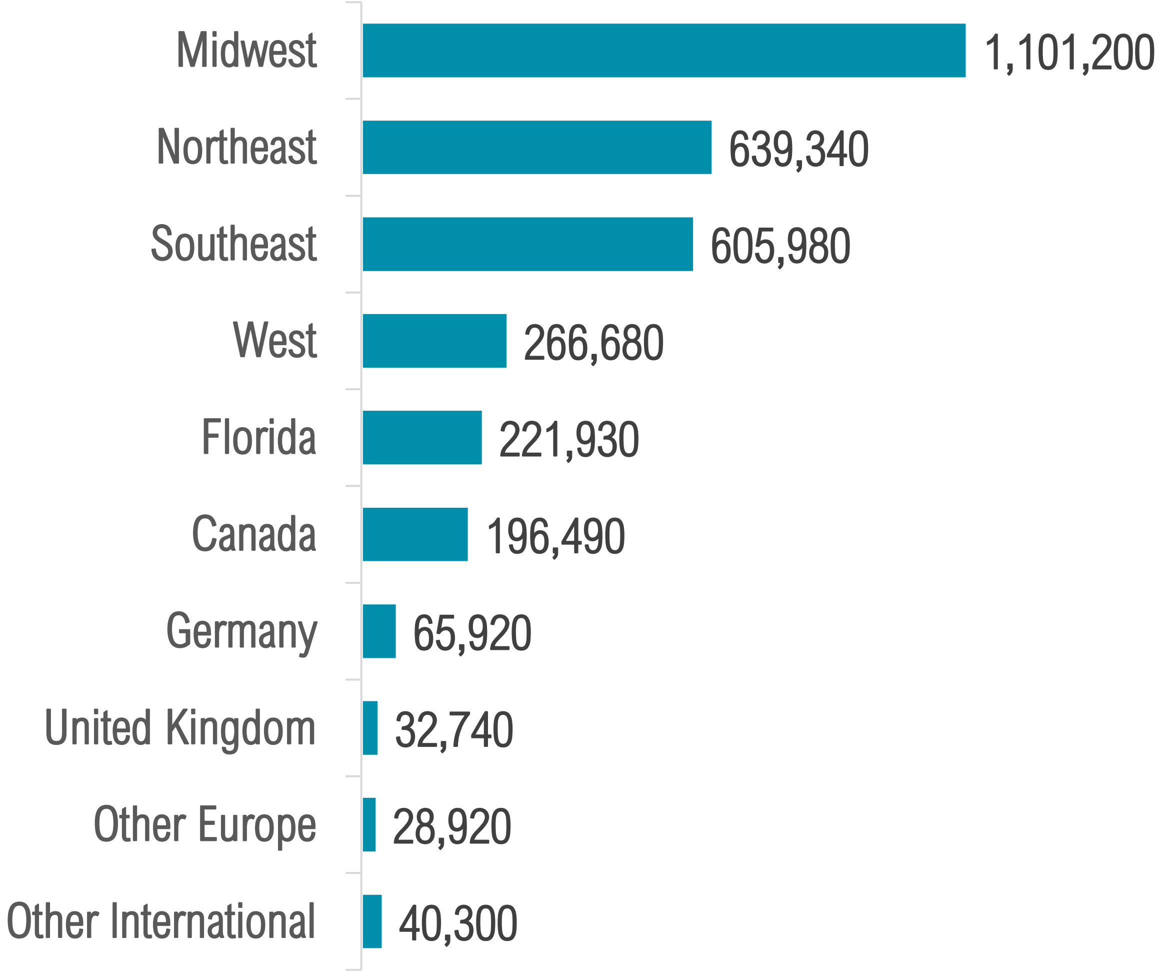




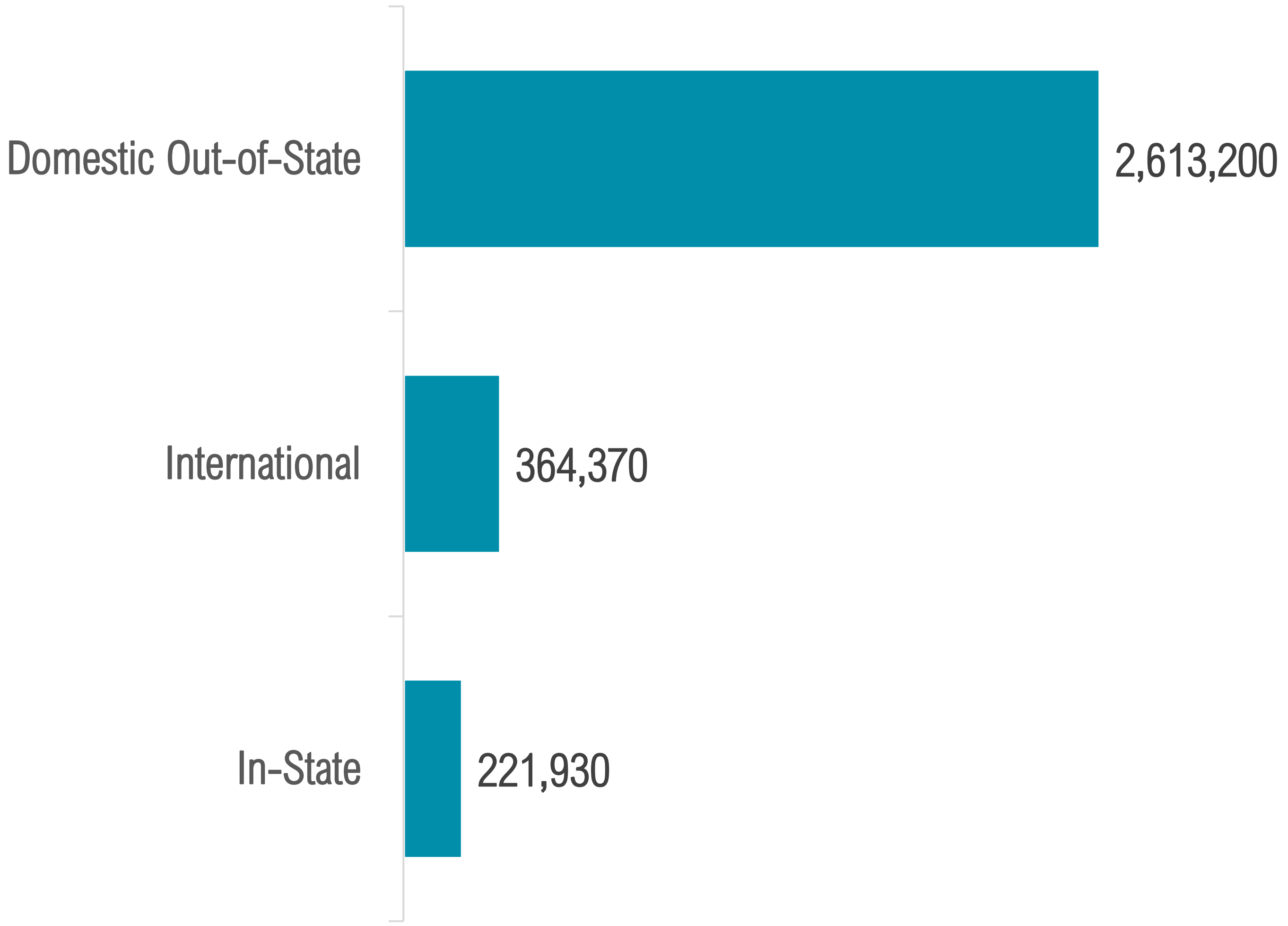
[1]Includes visitors who stayed in paid accommodations, stayed in non-paid accommodations, and day trippers.

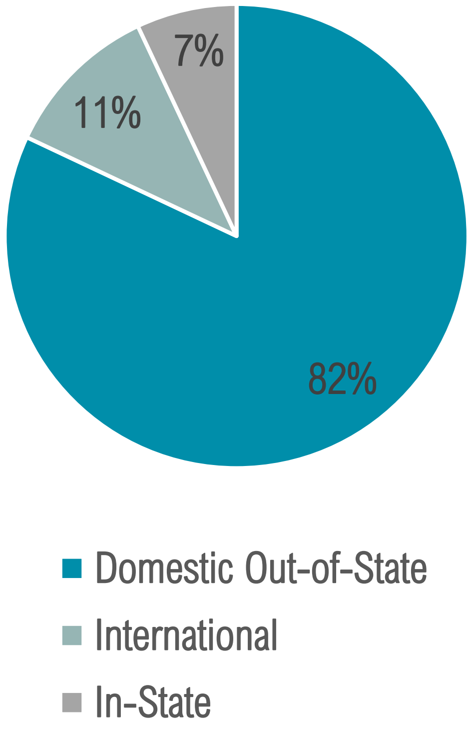
NUMBER OF VISITORS BY ORIGIN

Total of 3,199,500 visitors in 2024.



Number Of Visitors By Origin



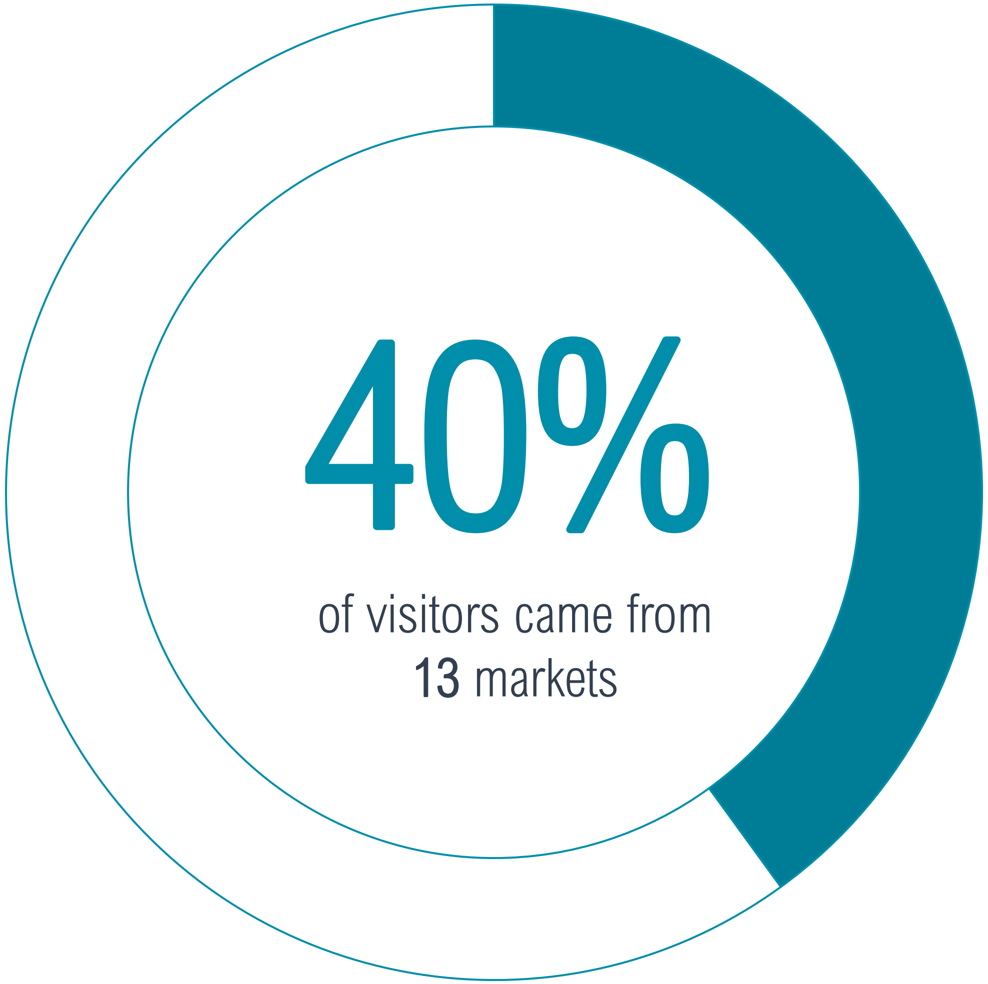


ORIGIN COUNTRY

Country	% of Visitors
United States	88.5%
Canada	6.2%
Germany	2.1%
UK	1.0%
Other	2.2%

TOP ORIGIN MARKETS[1]

Market	Percentage of Visitors
Chicago	5%
New York	5%
Minneapolis-Saint Paul	5%
Atlanta	4%
Detroit	3%
Boston	3%
Philadelphia	3%
Indianapolis	2%
Washington, DC-Hagerstown	2%
Cleveland-Akron	2%
Denver	2%
Cincinnati	2%
Miami-Fort Lauderdale	2%



[1]Includes visitors who stayed in paid accommodations, non-paid accommodations, and day trippers.

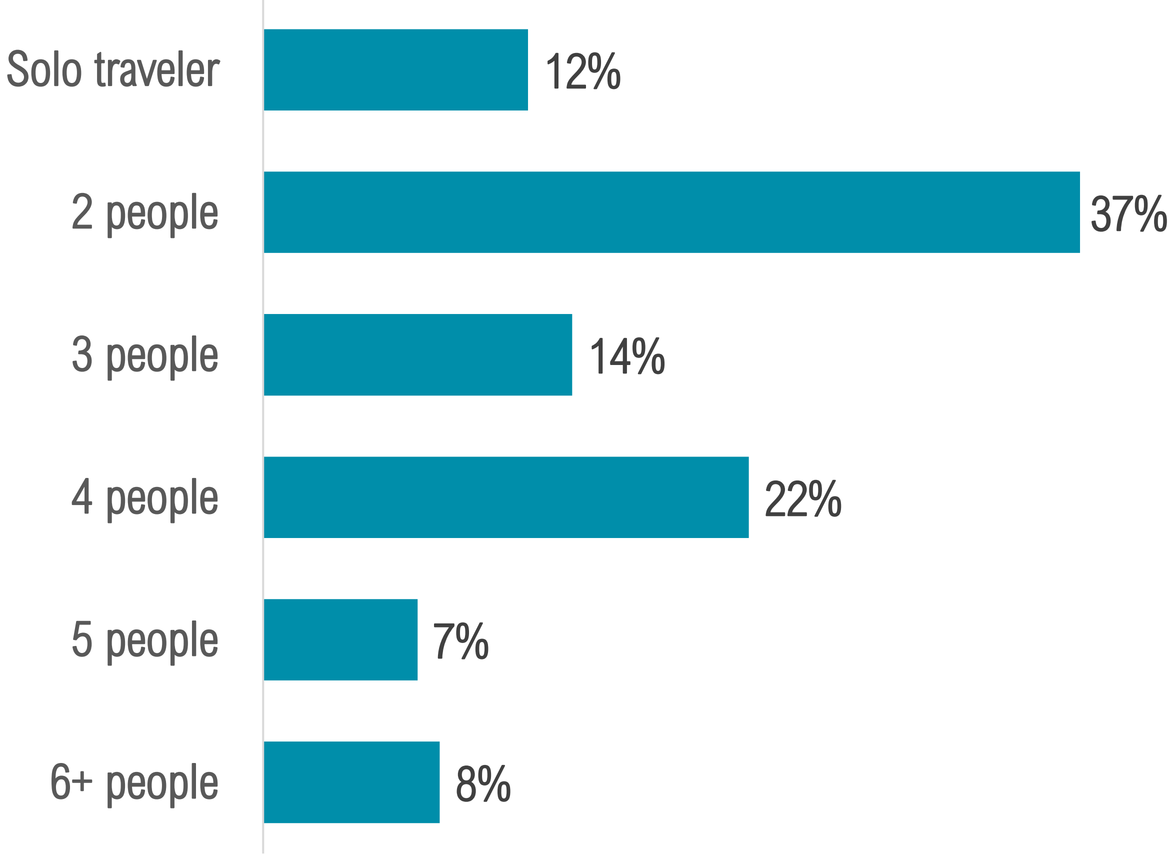
TRAVEL PARTY SIZE AND COMPOSITION

Travel Party Size

Visitors traveled in a party composed of 2.9[1] people.

Travel with Children

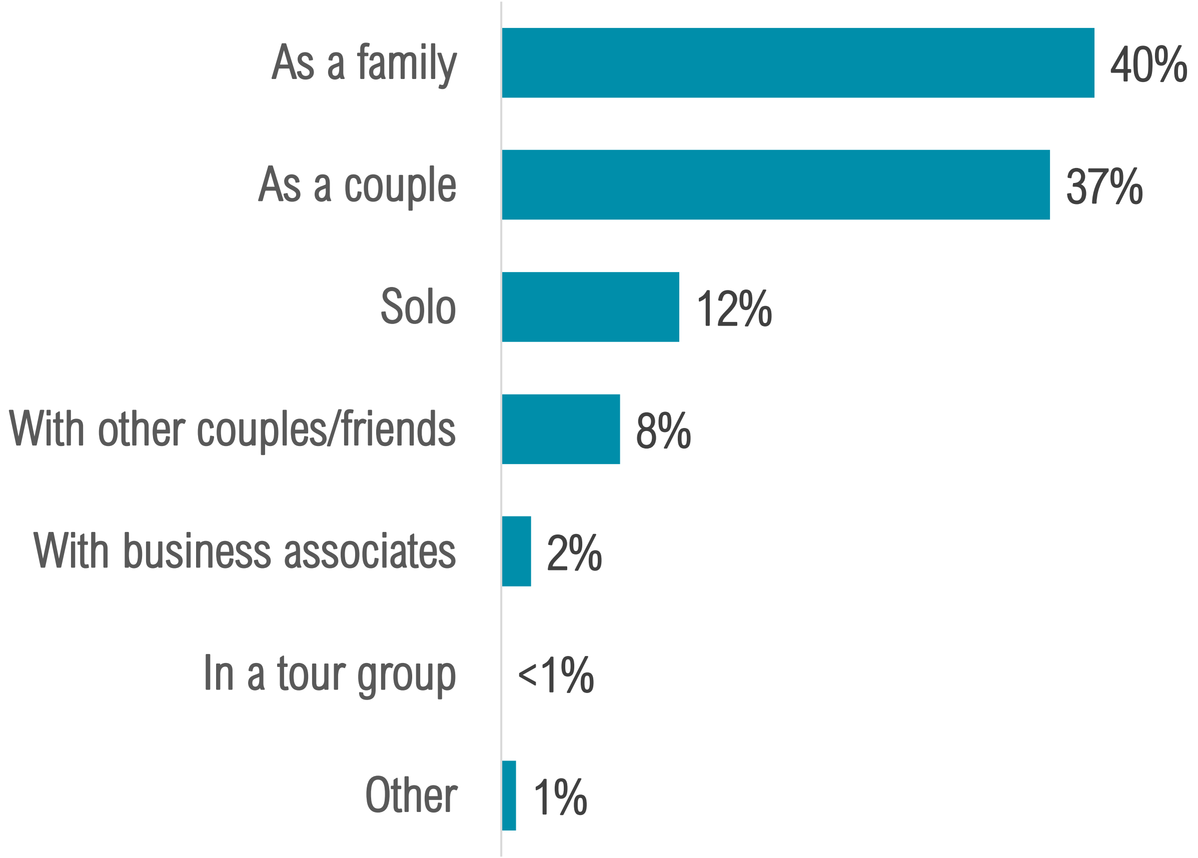
33% of visitors traveled with children under the age of 18.



[1]Source: Visitor Tracking Survey, includes all types of visitors

TRAVEL PARTY TYPE

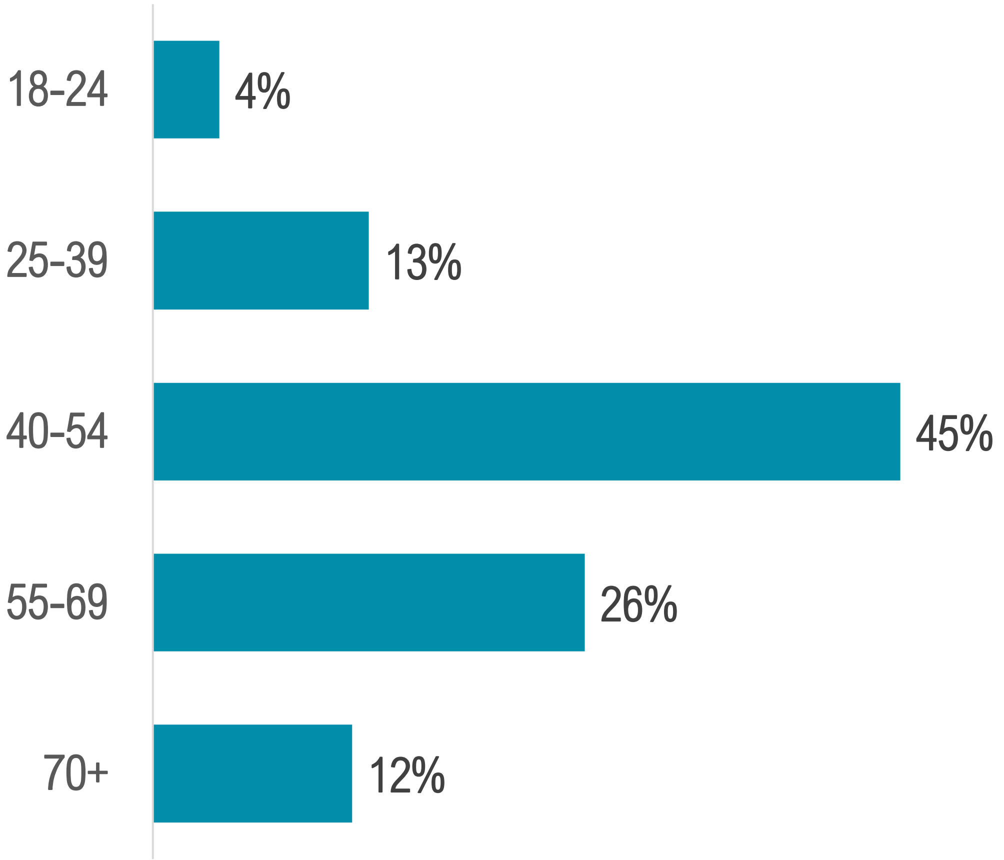
Visitors primarily traveled as a family or as a couple.



AGE

Median Age

The median age of 2024 visitors was **51 years old.**

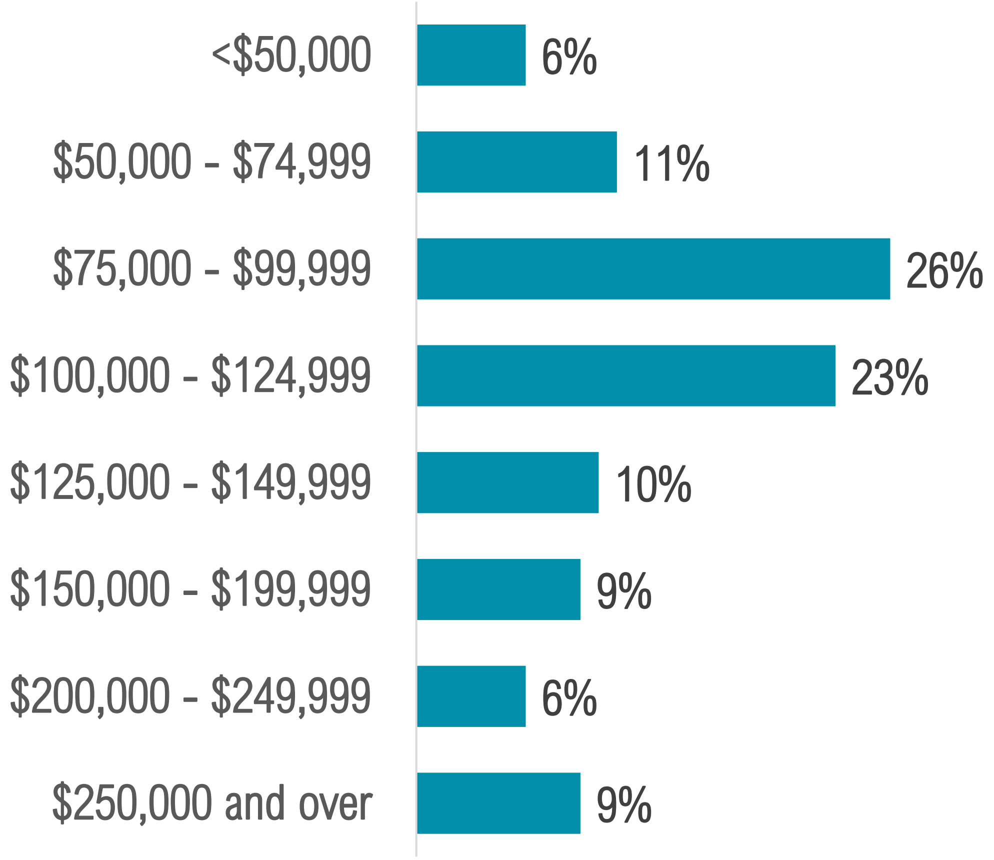


HOUSEHOLD INCOME

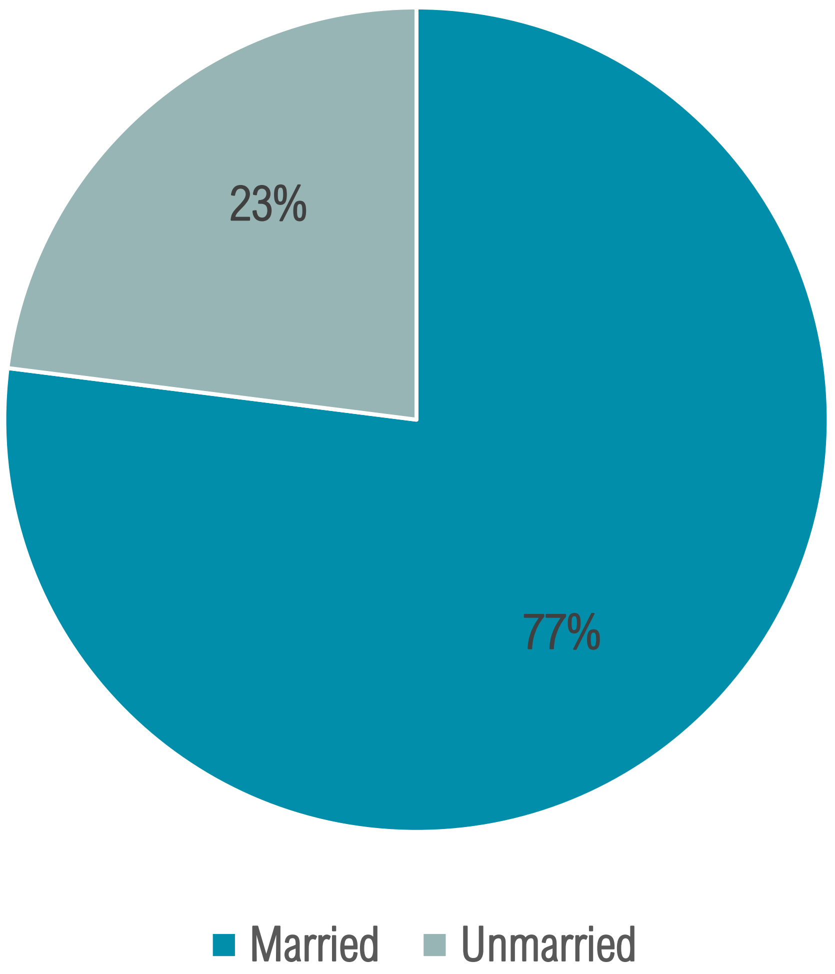
Median Household Income

2024 visitors had a median household income of **$107,600.**

15% of visitors earned more than **$200,000.**

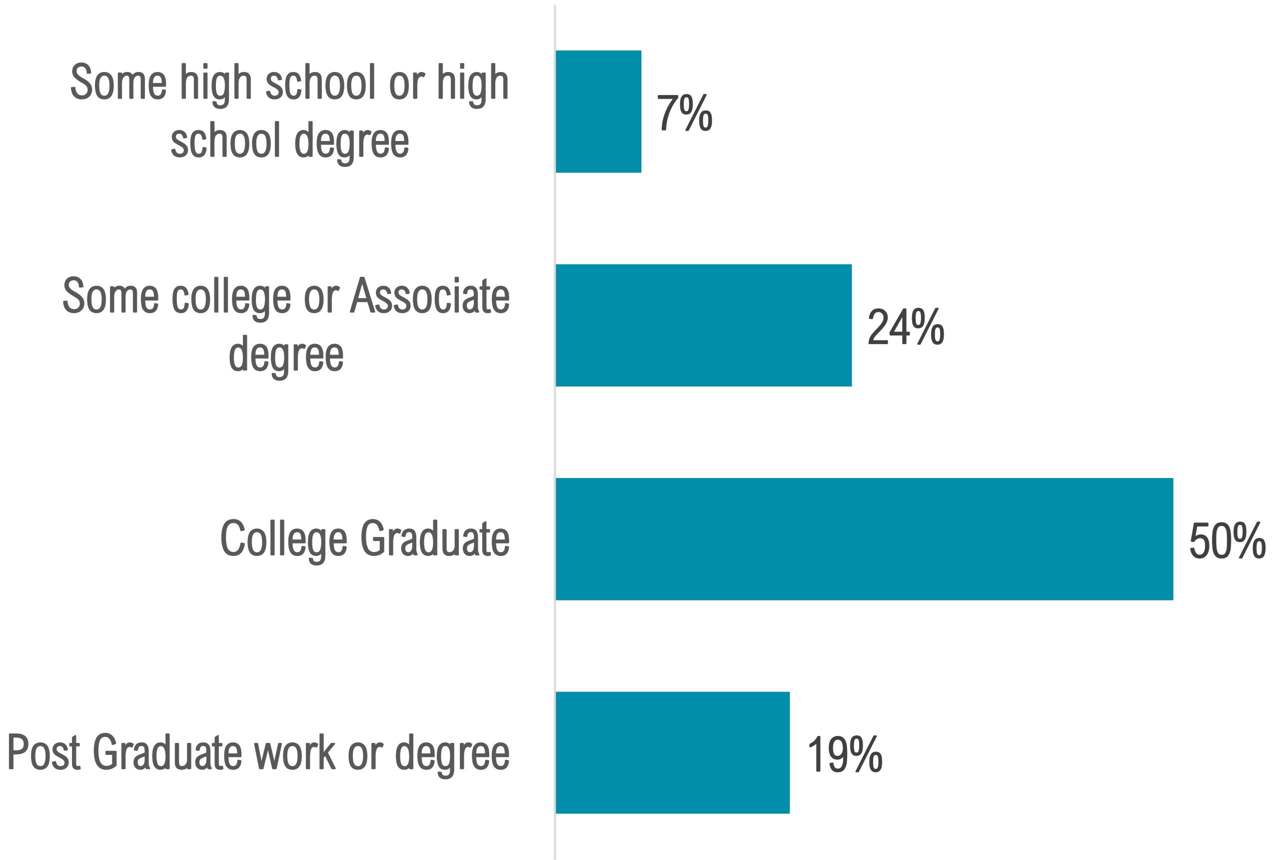


MARITAL STATUS

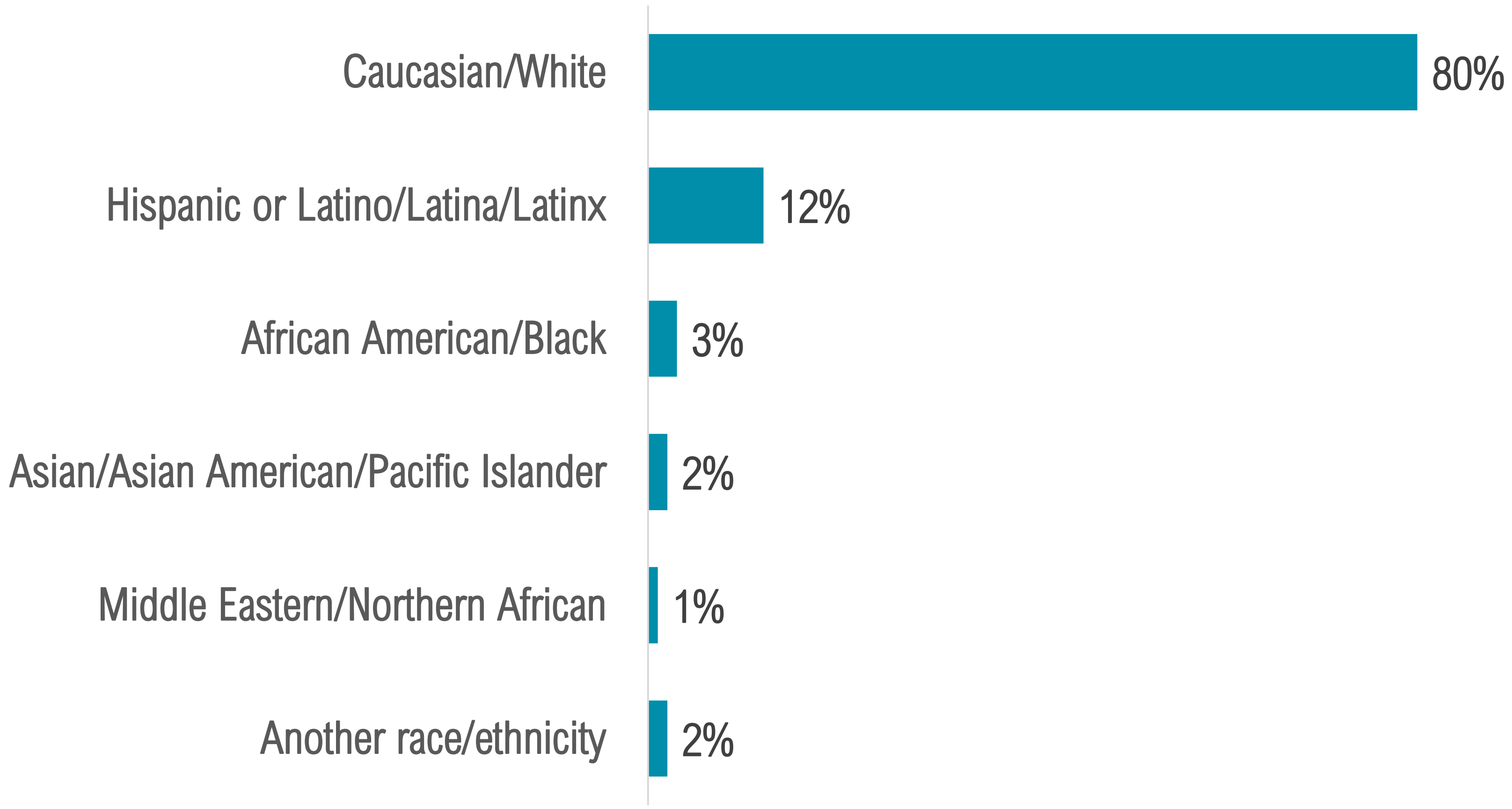


EDUCATION

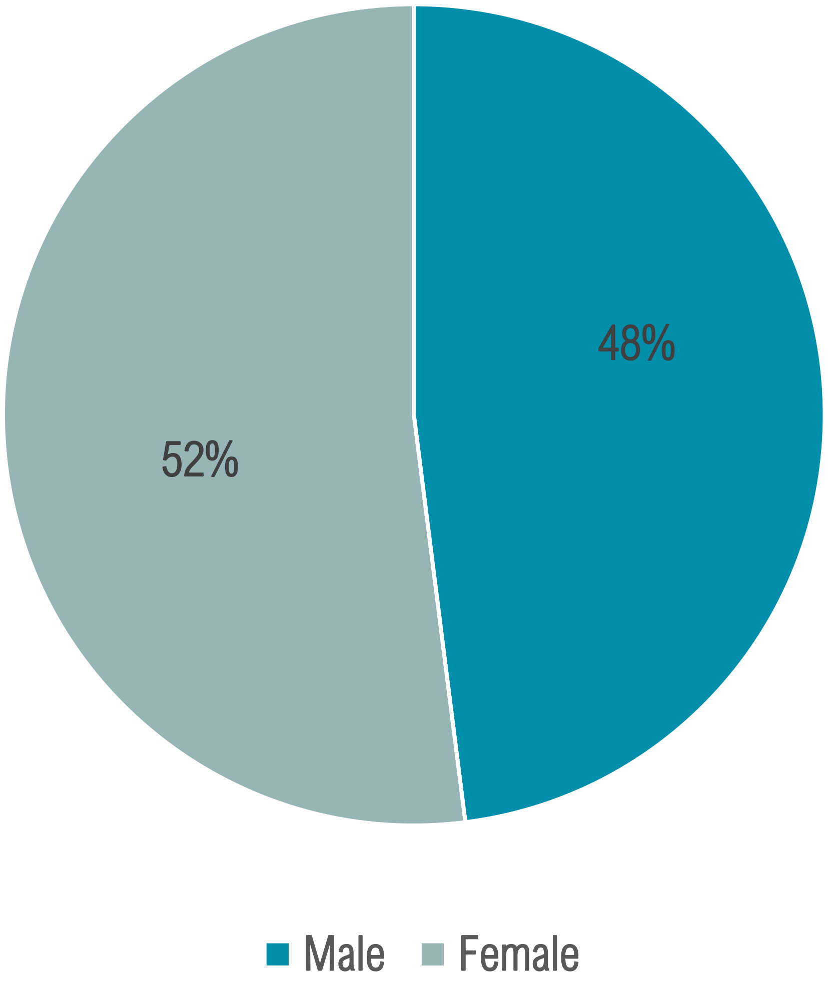
College Educated
69% of 2024 visitors were college graduates.



RACE/ETHNICITY



GENDER[1]

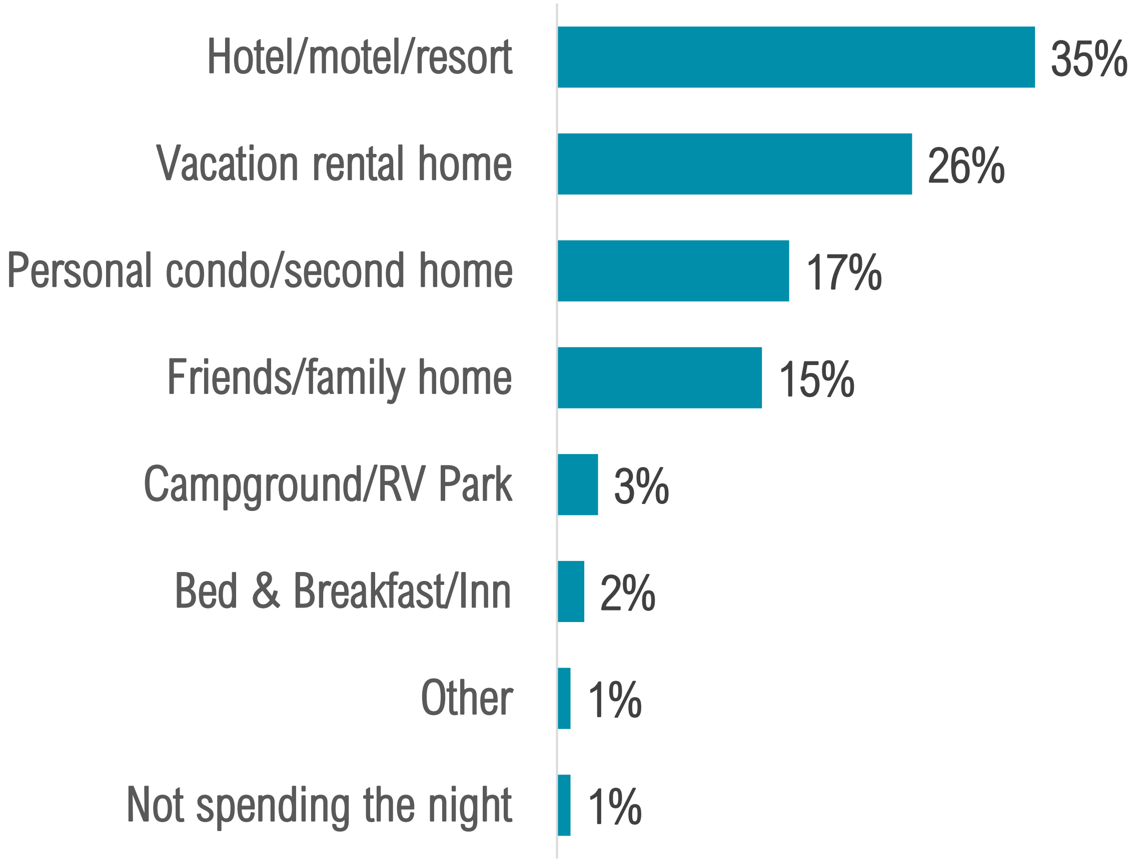


[1] Of person interviewed. Females are generally more likely to respond to surveys.

VISITOR JOURNEY: TRIP EXPERIENCE

ACCOMMODATIONS

2 in 3 visitors stayed in **paid accommodations** such as a hotel/motel/resort/B&B, condo/vacation rental, or a RV park/campground.



NIGHTS STAYED[1]

All Visitors

Visitors spent **6.4**[1] nights in the Fort Myers area.

Visitors Staying in Paid Accommodations

Visitors staying in paid accommodations spent **6.0**[1] nights in the Fort Myers area.

[1]Sources: Occupancy Study for visitors staying in paid accommodations and Visitor Tracking Survey for all other visitors

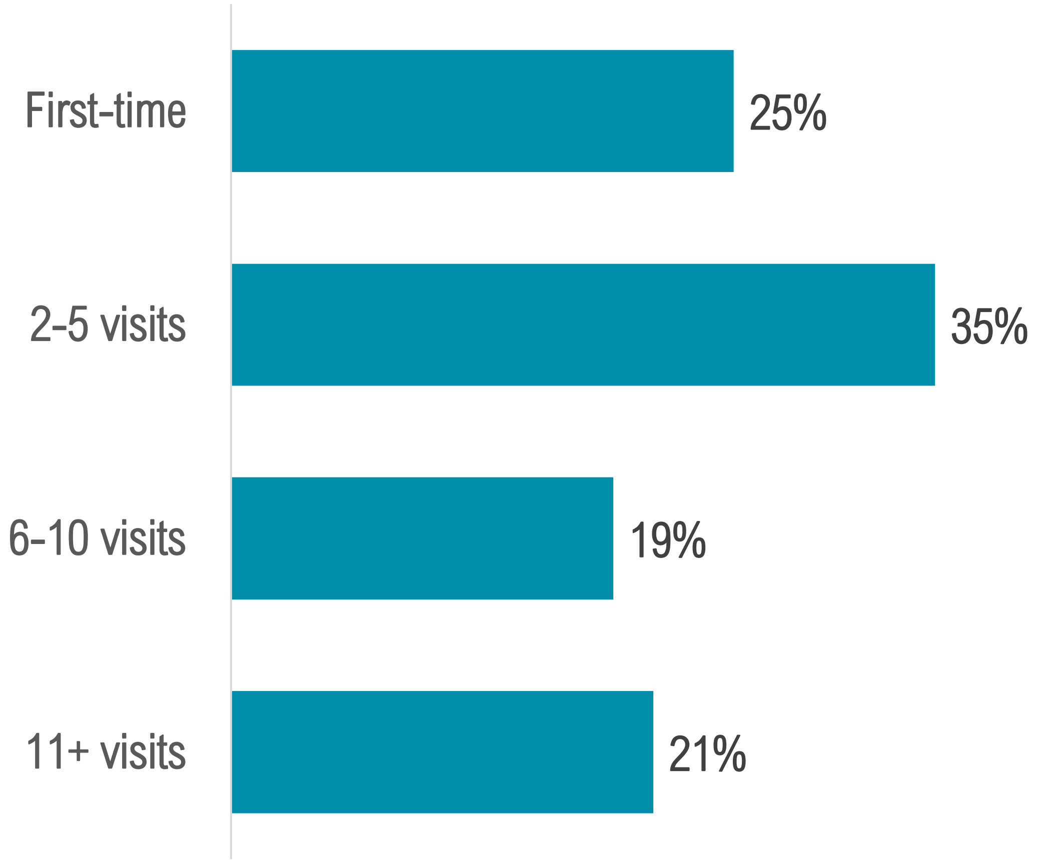
FIRST TIME AND EXPERIENCED VISITORS

First Time vs. Repeat Visitors

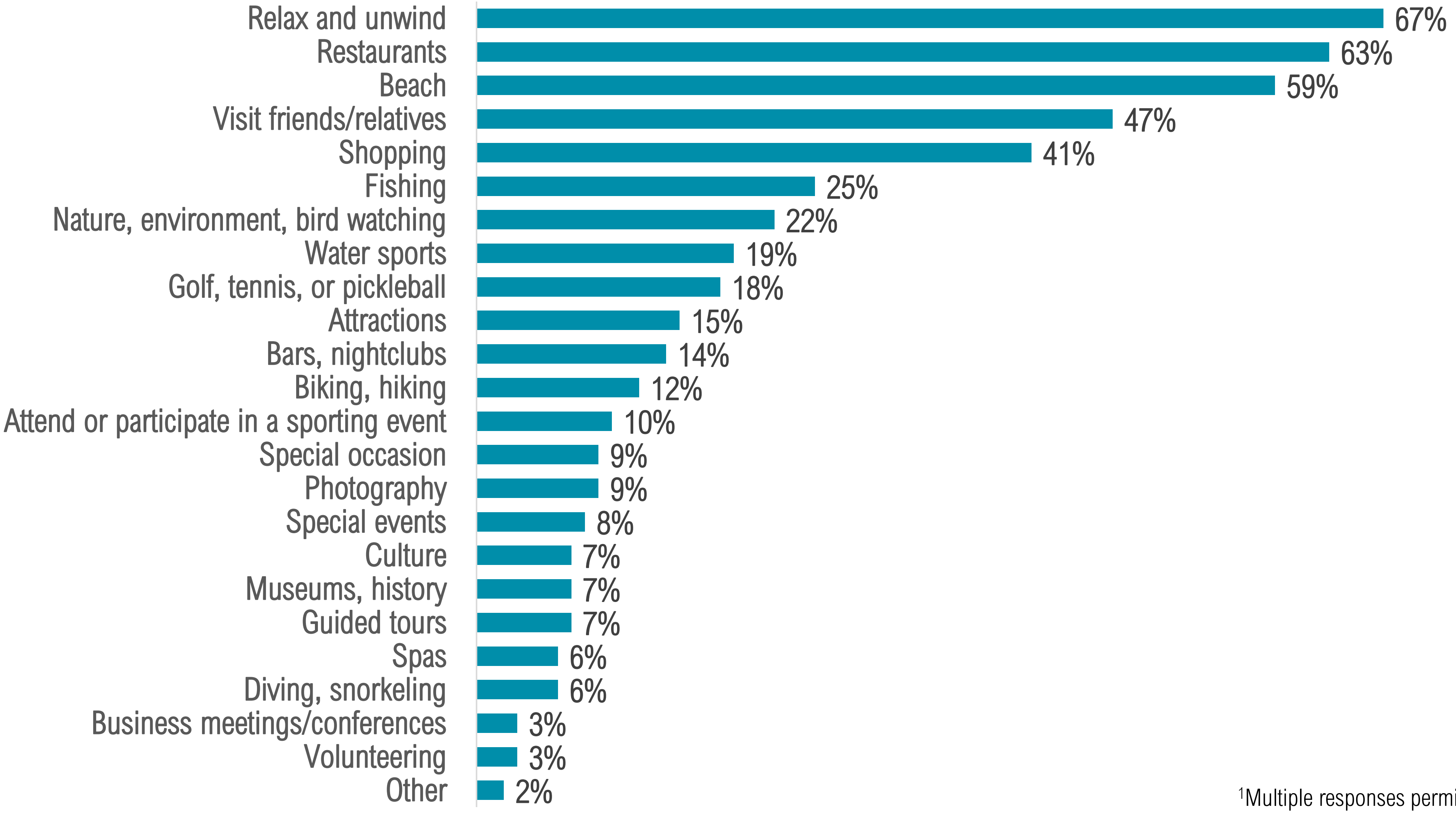
75% of visitors had previously visited the Fort Myers area, while 25% were visiting for the first time.

First Time vs. Repeat Visitors

Over 1 in 5 visitors were loyalists, i.e., they had visited more than 10 times.

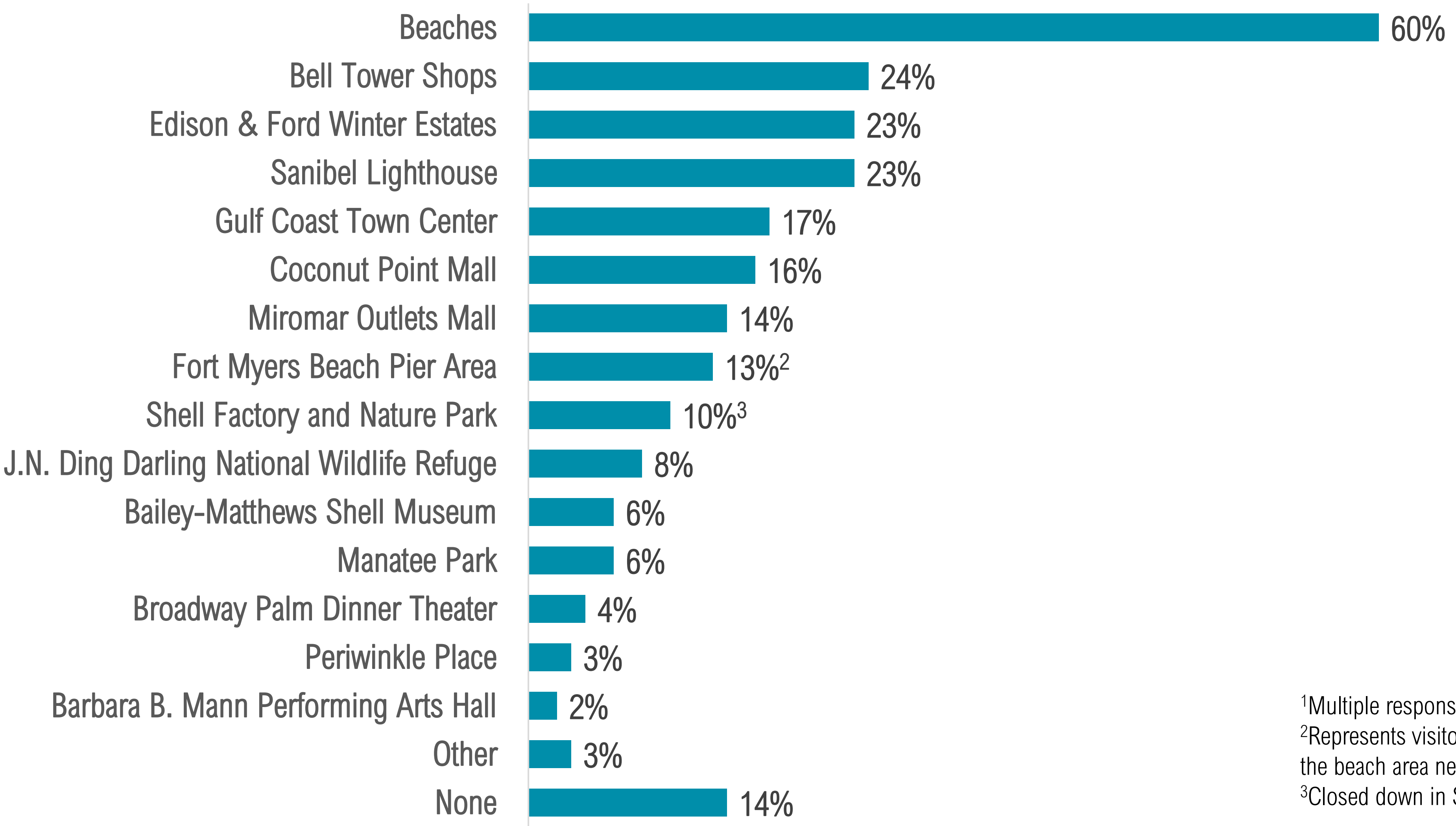


VISITOR ACTIVITIES[1]



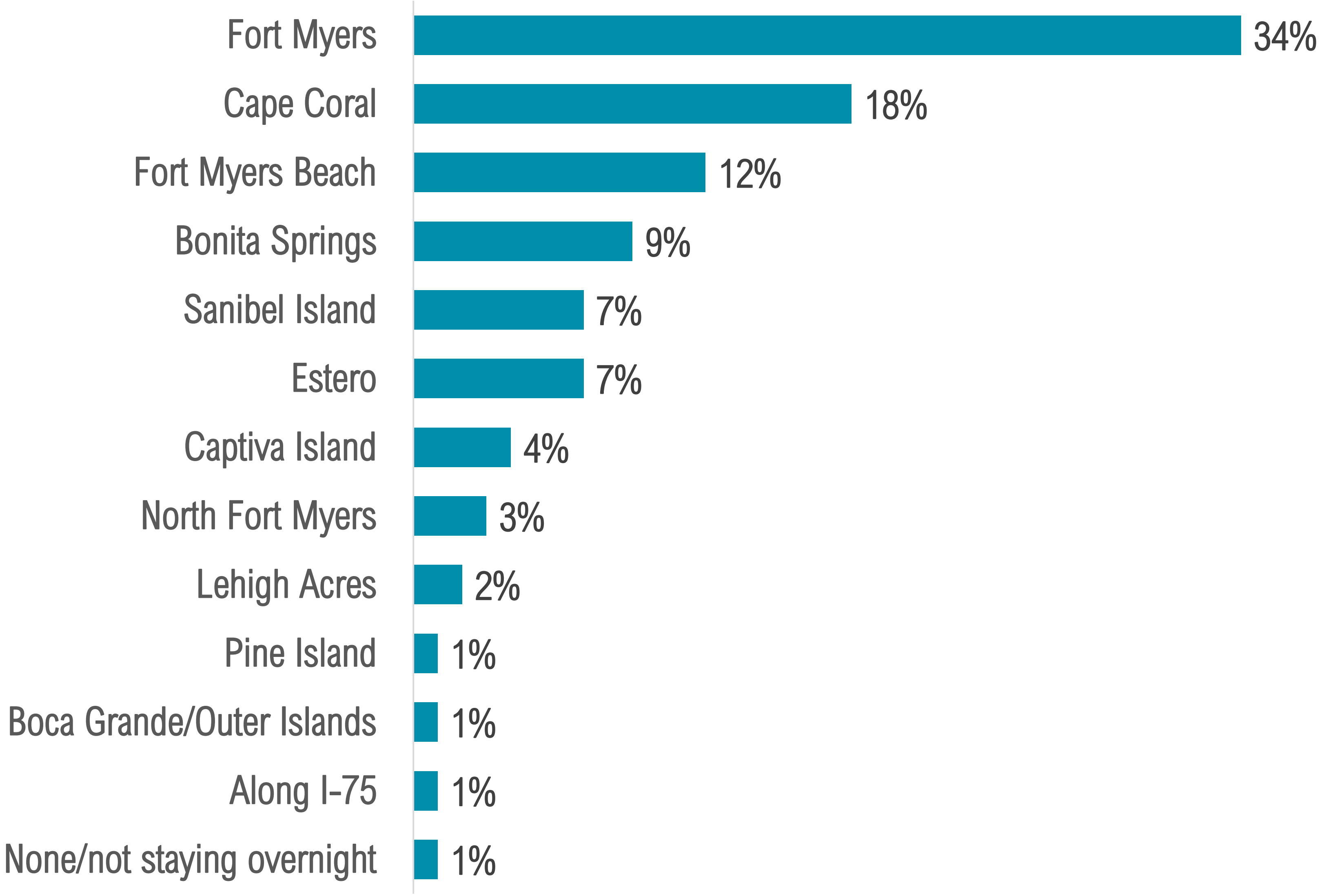
[1]Multiple responses permitted.

ATTRACTIONS VISITED[1]



[1]Multiple responses permitted.
[2]Represents visitors who spent time on the beach area near where the pier was.
[3]Closed down in September 2024.

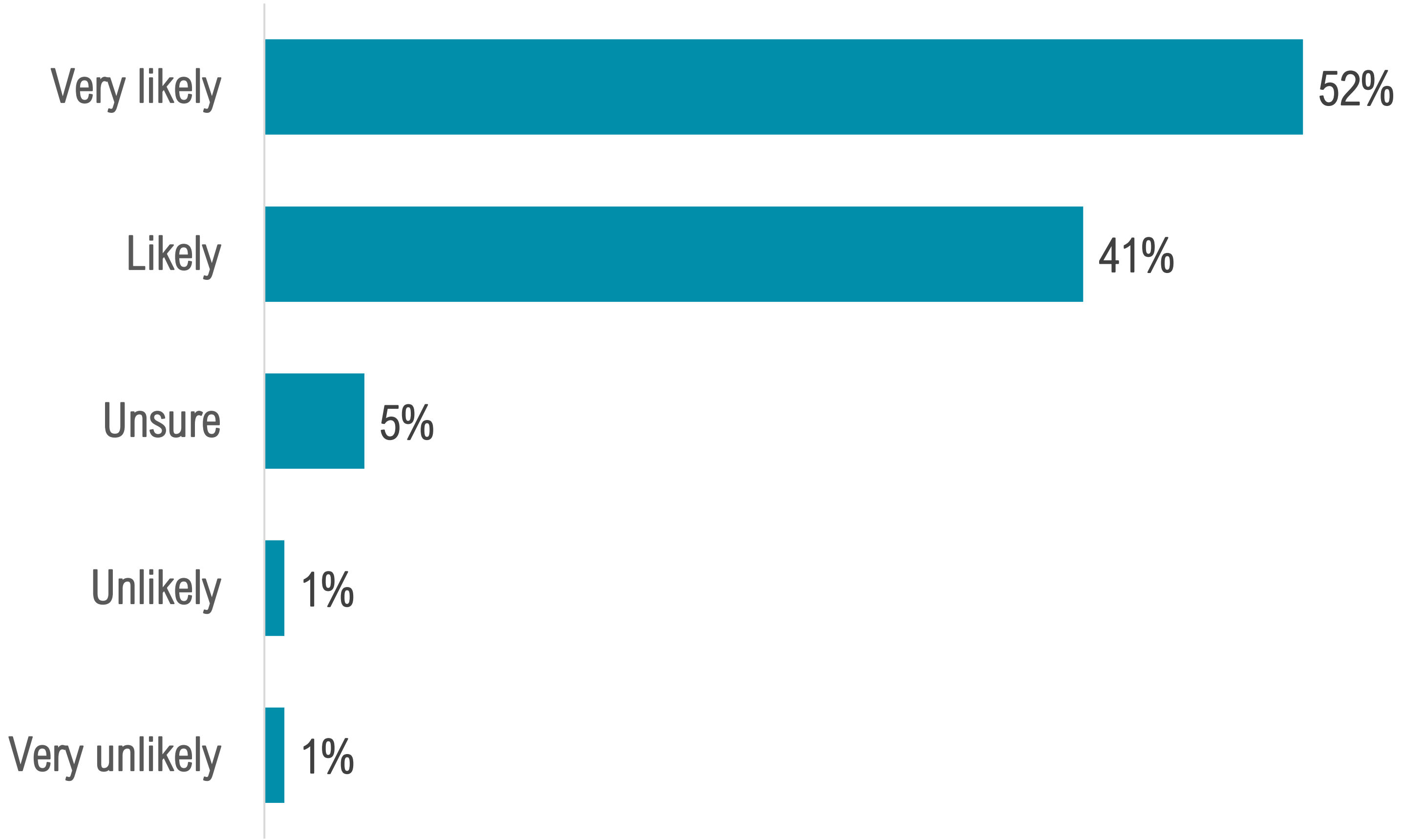
COMMUNITY STAYED



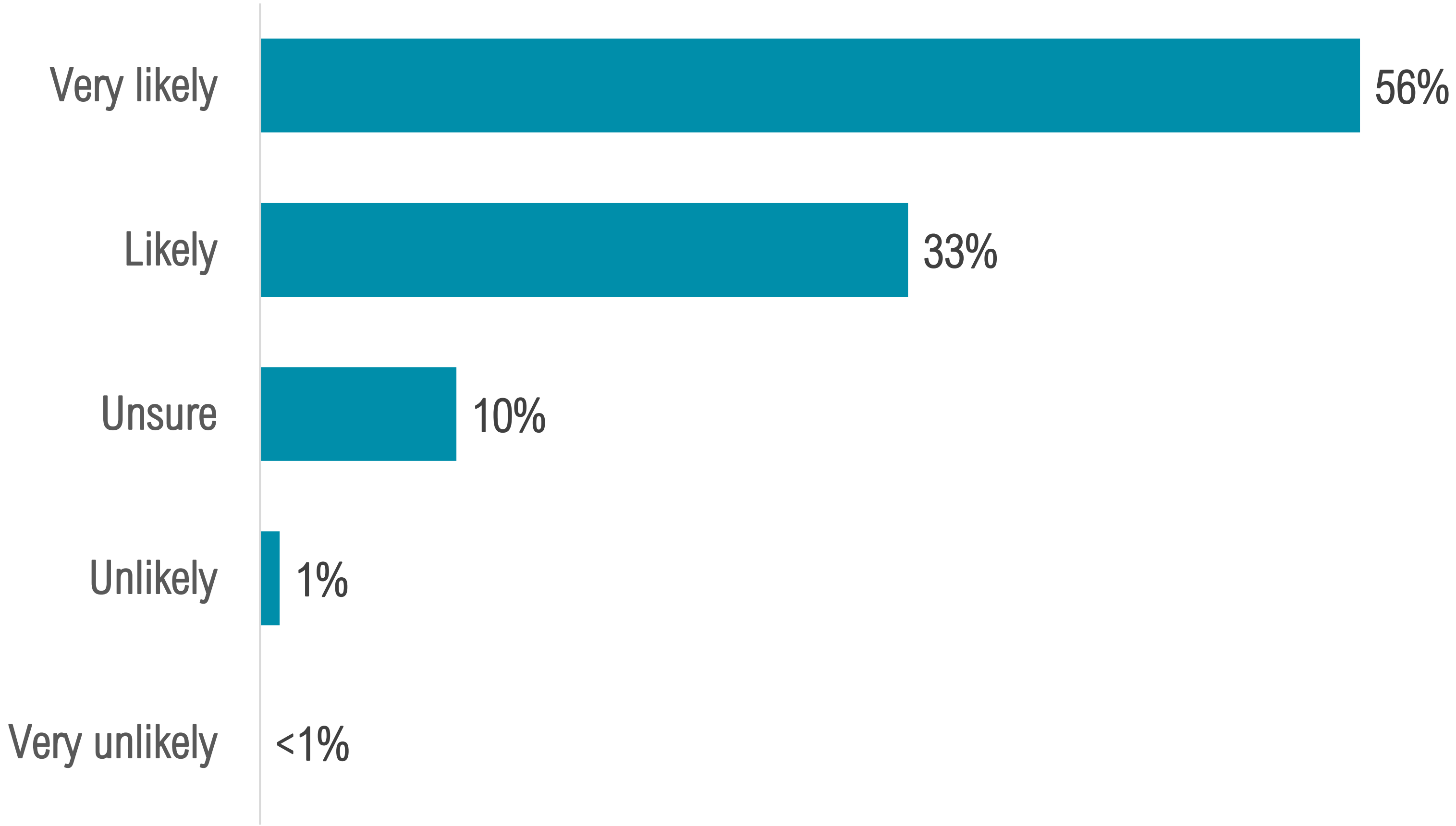
VISITOR JOURNEY: POST-TRIP EVALUATION

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

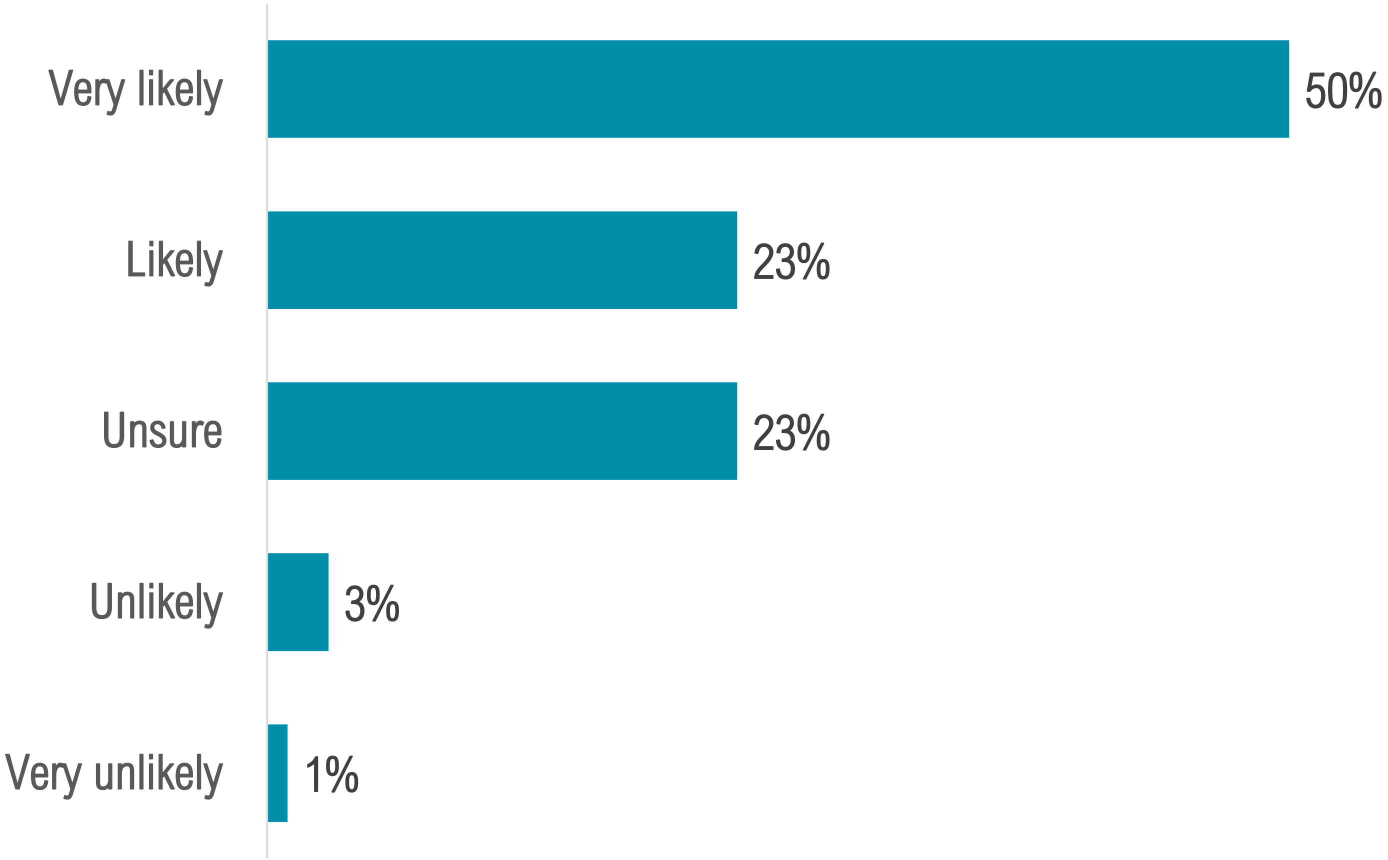
LIKELIHOOD OF RECOMMENDING THE AREA



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	42%	48%	50%	54%	46%	51%	56%	62%
Likely	41%	38%	43%	40%	44%	41%	37%	33%
Unsure/don't know	13%	10%	5%	4%	8%	6%	5%	4%
Unlikely	3%	3%	1%	1%	1%	1%	2%	1%
Very Unlikely	1%	1%	1%	1%	1%	1%	<1%	<1%

[1]Survey response options were expanded from Yes/No/DK to a 5-point Likert scale to provide more detailed information.

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	38%	46%	58%	59%	50%	55%	63%	67%
Likely	33%	31%	34%	34%	36%	34%	25%	25%
Unsure/don't know	22%	16%	8%	6%	11%	9%	9%	6%
Unlikely	6%	6%	<1%	1%	2%	2%	2%	1%
Very Unlikely	1%	1%	<1%	<1%	1%	<1%	1%	1%

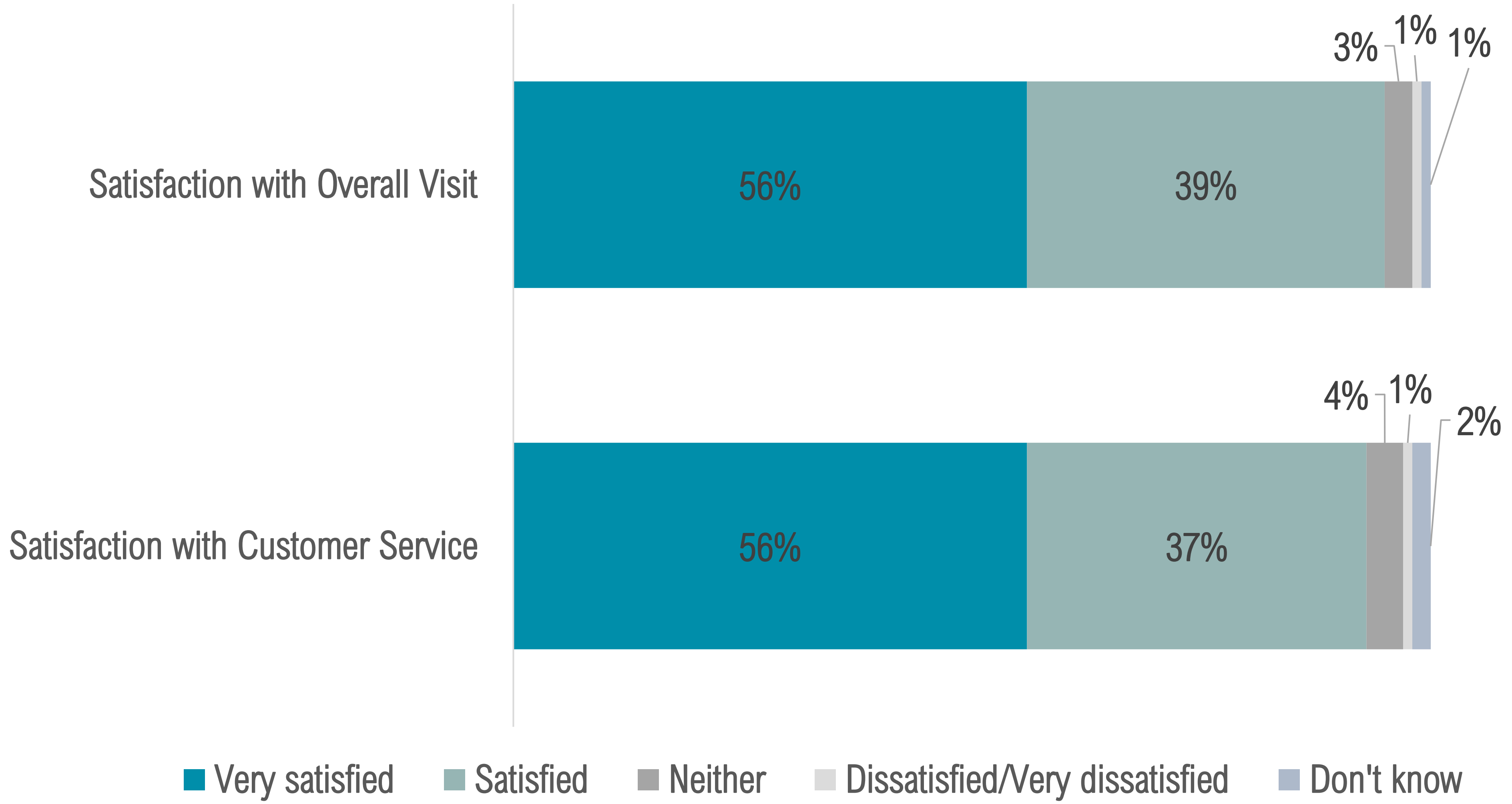
[1]Survey response options were expanded from Yes/No/DK to a 5-point Likert scale to provide more detailed information.

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	32%	38%	51%	55%	45%	51%	58%	60%
Likely	27%	25%	28%	23%	29%	24%	21%	18%
Unsure/don't know	33%	27%	19%	18%	23%	20%	18%	18%
Unlikely	6%	8%	1%	3%	2%	4%	3%	3%
Very Unlikely	2%	2%	1%	1%	1%	1%	<1%	1%

[1]Survey response options were expanded from Yes/No/DK to a 5-point Likert scale to provide more detailed information.

SATISFACTION



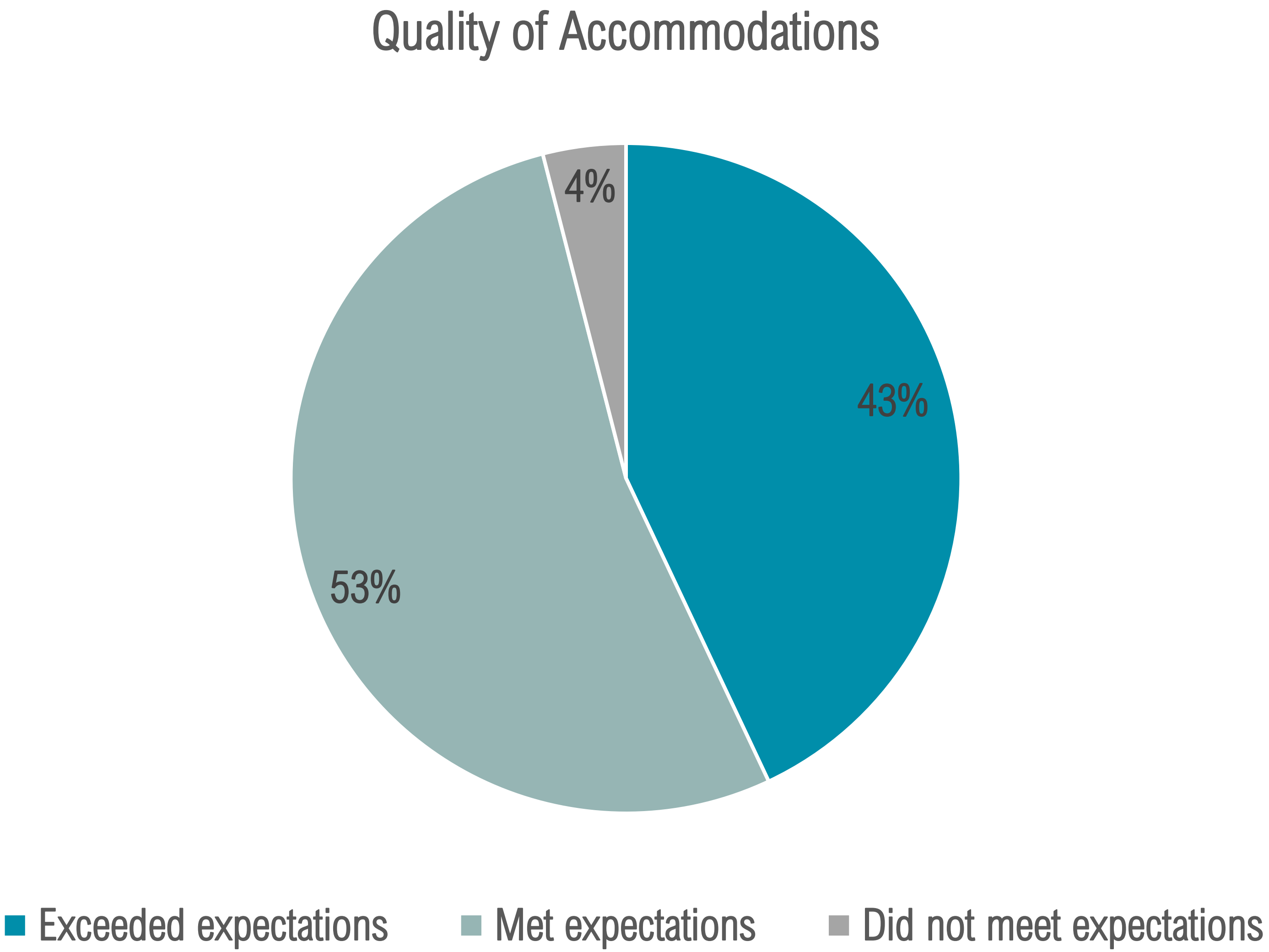
CROSSTABULATIONS: SATISFACTION WITH OVERALL VISIT

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2023	2024	2023	2024	2023	2024	2023	2024
Very Satisfied	48%	53%	57%	58%	53%	55%	64%	68%
Satisfied	40%	39%	38%	39%	40%	40%	30%	27%
Unsure/don't know	7%	6%	5%	3%	6%	4%	5%	3%
Dissatisfied	4%	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	51%	56%	56%	57%	56%	57%	60%	64%
Satisfied	34%	36%	38%	37%	36%	37%	32%	30%
Unsure/don't know	10%	6%	5%	5%	6%	5%	7%	5%
Dissatisfied	4%	2%	1%	1%	2%	1%	1%	1%
Very Dissatisfied	1%	<1%	<1%	<1%	<1%	<1%	<1%	<1%

SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

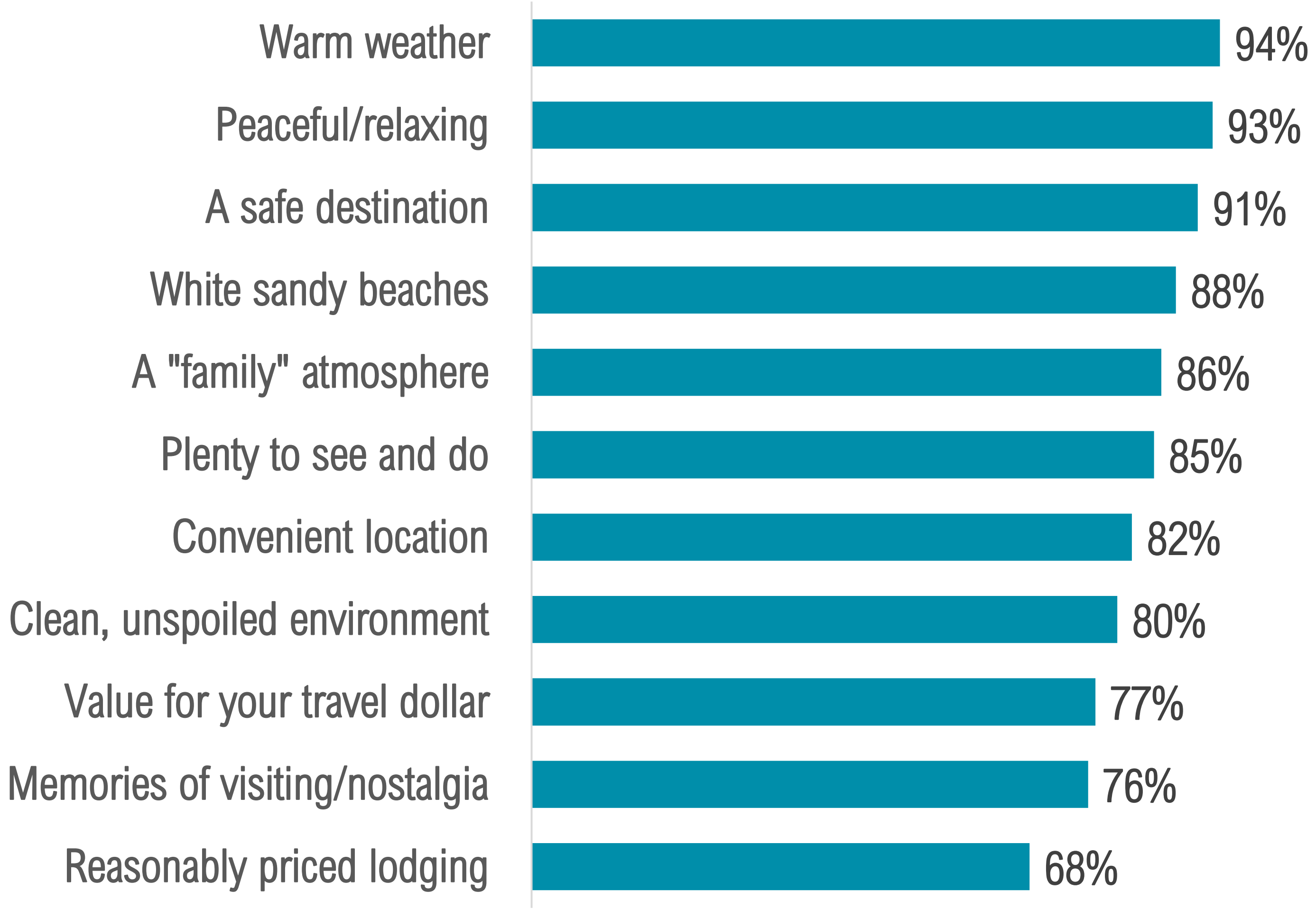


SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2023	2024	2023	2024	2023	2024	2023	2024
Exceeded Expectations	37%	41%	39%	44%	41%	44%	38%	47%
Met Expectations	50%	53%	57%	53%	50%	51%	53%	49%
Did Not Meet Expectations	13%	6%	4%	3%	9%	5%	9%	4%

ATTRIBUTE RATINGS[1]

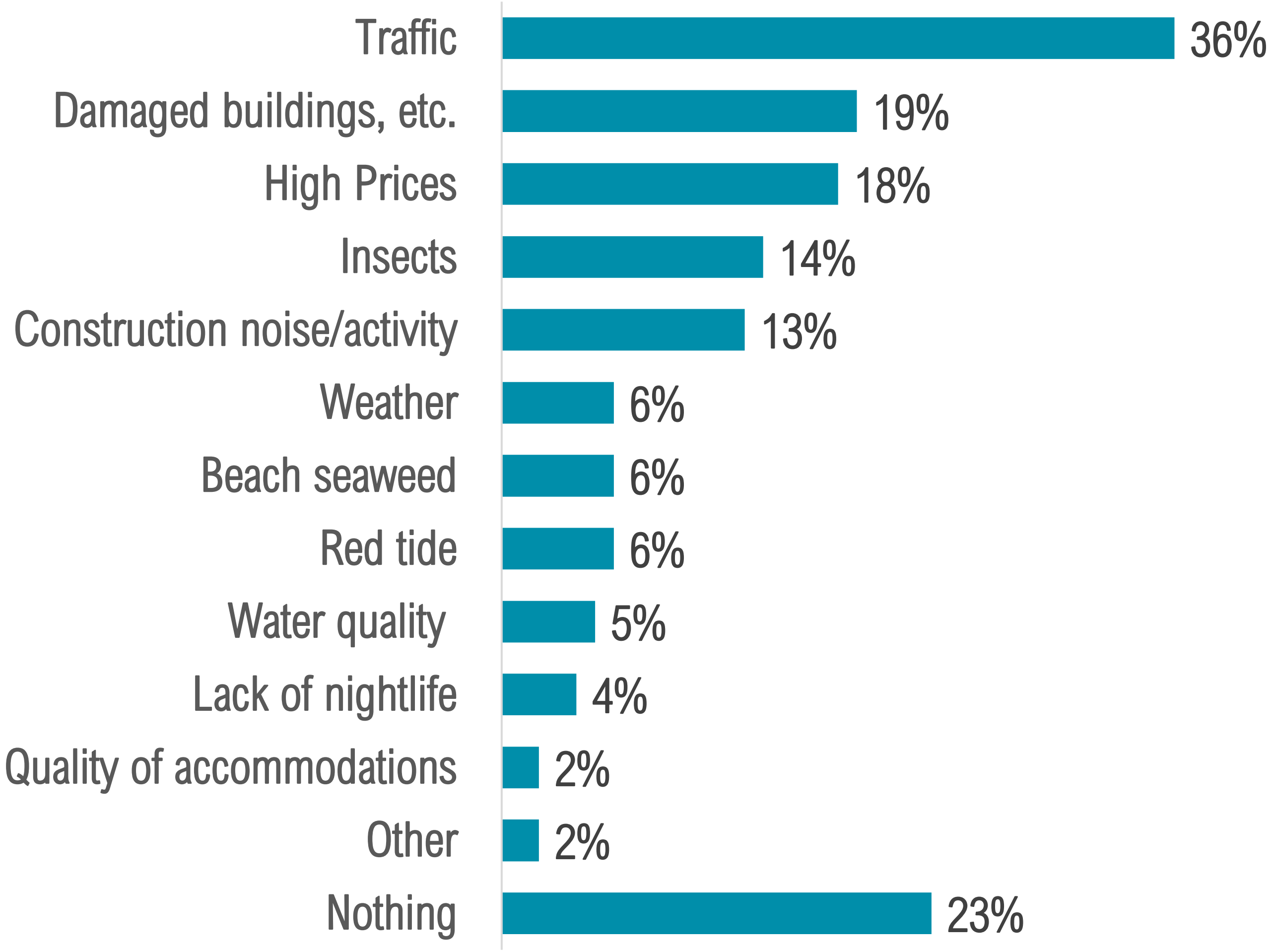
91% or more of visitors gave high experience ratings for warm weather, peacefulness, and safety in the Fort Myers area.



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

VISITOR CONCERNS[1]

Over 1 in 3 visitors were concerned about traffic, and nearly 1 in 5 were concerned about damaged buildings or high prices.



[1]Multiple responses permitted.

AREA DESCRIPTIONS

Warm Weather

- “It’s so much different than where we’re from! The weather, the air, the trees, the people, the beaches, it just all makes for such a perfect vacation.”
- “Great time with perfect weather, sunshine, great jet skis, and a charter fishing tour.”
- “Nice family vibe with good restaurants, nice people, warm weather, good shopping, and more.”
- “We love coming here because when it’s gray and chilly back home, it’s still sunny and warm here.”
- “It has been a great vacation as usual, full of warm sunshine-filled days and cool nights.”

Peaceful & Relaxing

- “We’ve had a wonderful vacation with our family; visiting the beaches, enjoying the sunshine, great weather, and relaxing environment.”
- “Wonderful time in a gorgeous environment with plenty of sunshine and a very relaxing atmosphere.”
- “It’s the perfect place to slow down, unwind, and enjoy the simple beauty of 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.”

AREA DESCRIPTIONS

A Safe Destination

- “Safe, family-friendly, clean, but lots of hurricane recovery related construction still going on. Still worth a visit though!”
- “Great place for retired people to vacation and make new memories. It’s a beautiful and safe town, great for a warm getaway with friends or family.”
- “More family-oriented than I had expected, which has been great. Edison & Ford was outstanding!”

“Family” Atmosphere

- “A slow-paced and laid-back area to bring your family. It’s a clean and safe place to vacation.”
- “We found the area to be extremely clean, fun, and family-friendly. Definitely a must try vacation spot for people who like vacationing in Florida!”
- “Very family-friendly town with close by shopping available and many other things to do.”
- “It’s our favorite vacation destination with near perfect weather, beautiful beaches, and a lot to do for the family!”

Year-Over-Year Comparisons

ECONOMIC IMPACT

Visitor & Lodging Statistics	2023[5]	2024	% Change
Visitors	2,771,200	3,199,500	+ 15.5%
Visitor Days[1]	17,576,800	20,420,100	+ 16.2%
Room Nights	3,826,800	4,405,000	+ 15.1%
Direct Expenditures[2]	$2,636,829,100	$3,108,446,700	+ 17.9%
Total Economic Impact[3,4]	$4,221,563,400	$4,951,755,500	+ 17.3%
Occupancy	56.8%	58.8%	+ 3.6%
ADR	$167.47	$178.86	+ 6.8%
RevPAR	$95.10	$105.22	+ 10.6%
TDT Collections	$37,247,400	$43,861,100	+ 17.8%

[1] Visitor Days reflect the total amount of days that visitors spent in the destination including all visitor types and not just those who stayed in paid accommodations.
[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] The IMPLAN multiplier used to estimate economic impact is 1.593.
[5] 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.

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM

	2023[2]	2024	% Change
Direct Jobs	28,070	31,460	+ 12.1%
Total Jobs[1]	37,570	42,150	+ 12.2%
Direct Wages	$972,116,900	$1,126,017,400	+ 15.8%
Total Wages[1]	$1,391,803,900	$1,601,256,400	+ 15.0%
Direct Local Taxes	$87,779,009	$108,220,601	+ 23.3%
Total Local Taxes[1]	$120,104,708	$142,953,043	+ 19.0%
Direct State Taxes	$111,699,985	$144,785,972	+ 29.6%
Total State Taxes[1]	$151,874,778	$192,276,335	+ 26.6%

[1] "Total wages" and "total taxes" are greater than "direct wages" and "direct taxes" because visitors direct spending is recirculated throughout the Lee County economy as employees and employers buy products and services with visitors' dollars.
[2] Data has been revised to reflect updated unit figured for RV Parks & Campgrounds as determined in a survey of Lee County RV Parks & Campgrounds conducted by DSG Research in 2023.

VISITOR TYPE

Visitor Type	2023	2024
Visitors in Paid Accommodations	67%	67%
Visitors in Non-Paid Accommodations	31%	32%
Day Trippers	2%	1%

PRE-VISIT

Planned trip in advance	2023	2024
1 week or less	7%	5%
2-4 weeks	13%	13%
1-2 months	34%	37%
3-6 months	30%	31%
6 months or more	15%	14%
Not sure	1%	<1%

Considered Other Destinations	2023	2024
Yes	39%	30%
No	61%	70%

PRE-VISIT

Trip Planning Websites[1]	2023	2024
Airline websites/apps	30%	33%
Online search engines	28%	28%
Airbnb, Vrbo, etc.	19%	21%
Hotel websites/apps	14%	16%
Booking websites	14%	16%
Vacation rental websites/apps	13%	14%
Tripadvisor	13%	10%
www.VisitFortMyers.com	7%	8%
Traveler reviews, blogs, stories	12%	8%
Visit Florida	8%	7%
VCB Facebook Page	7%	7%
Facebook	8%	6%
Instagram	4%	5%
Streaming websites/apps	4%	3%
None	23%	22%
Other	3%	3%

[1]Multiple responses permitted.

PRE-VISIT

Information Requests[1]	2023	2024
Calling a hotel, motel, condo	25%	21%
Requesting and receiving a visitor guide	7%	7%
Calling the VCB	5%	3%
Receiving the VCB e-newsletter	2%	3%
Calling a local Chamber of Commerce	2%	2%
Other	2%	2%
None	67%	70%

[1]Multiple responses permitted.

PRE-VISIT

Reasons for Visiting[1]	2023	2024
Relax & unwind	38%	45%
Beach	28%	38%
Visiting friends & relatives	28%	34%
Part-time/seasonal resident	9%	13%
Checking-in on my property post-hurricane	11%	12%
Special occasion	7%	9%
Fishing	6%	9%
Golf or tennis	7%	8%
Sporting event	7%	7%
Shopping	8%	7%
Attractions	4%	6%
Nature, environment, bird watching	5%	6%
Special event	5%	4%
Water sports	5%	4%
Business meetings/conferences	5%	3%
Biking, hiking	2%	2%
Photography	3%	2%
Volunteering	4%	2%
Work-related hurricane recovery	5%	2%
Culture	1%	1%
Museums, history	1%	1%
Diving, snorkeling	1%	1%
Guided tours	1%	1%
Other	5%	5%

[1]Three responses permitted.

PRE-VISIT

Recall of Lee County Promotions	2023	2024
Yes	43%	38%

Influenced by Promotions	2023	2024
Yes	21%	20%

Source of Advertising Recall	2023	2024
Internet	49%	48%
Social media	36%	35%
Traveler reviews, blogs	21%	20%
Television	14%	14%
www.VisitFortMyers.com	8%	10%
Magazine	7%	9%
Travel/visitor guide	7%	9%
Newspaper	7%	8%
Email/e-newsletter	7%	7%
Video streaming services	8%	6%
Billboard	3%	5%
Brochure	3%	5%
Radio	3%	4%
AAA	5%	4%
Deal-based promotion	2%	3%
Music streaming services	1%	1%
Podcasts	1%	1%
Other	3%	3%

PRE-VISIT

Characteristics influencing decision to visit Lee County (top 2 boxes)	2023	2024
Warm weather	87%	88%
Peaceful/relaxing	87%	87%
A safe destination	83%	83%
White sandy beaches	77%	80%
Plenty to see and do	78%	77%
Convenient location	72%	76%
Clean, unspoiled environment	76%	75%
A "family" atmosphere	74%	74%
Value for your travel dollar	71%	70%
Memories of visiting/nostalgia	72%	68%
Reasonably priced lodging	63%	63%

PRE-VISIT

Transportation	2023	2024
Fly	69%	69%
Drive a personal vehicle	23%	25%
Drive a rental vehicle	6%	4%
Drive a RV	1%	1%
Travel by bus	<1%	<1%
Other	1%	1%

Airport Used	2023	2024
Southwest Florida International	84%	81%
Punta Gorda	7%	9%
Miami International	2%	3%
Ft. Lauderdale International	3%	3%
Tampa International	2%	2%
Orlando International	1%	1%
Other	1%	1%

TRAVEL PARTY PROFILE

Visitor Origin Regions[1]	2023	2024
Midwest	33.8%	34.4%
Northeast	19.5%	20.0%
Southeast	20.1%	18.9%
West	8.4%	8.3%
Florida	6.2%	6.9%
Canada	6.5%	6.2%
Germany	2.4%	2.1%
UK	1.0%	1.0%
Other Europe	0.9%	0.9%
Other International	1.2%	1.3%

Visitor Origin Markets[1]	2023	2024
Chicago	4%	5%
New York	6%	5%
Minneapolis-Saint Paul	3%	5%
Atlanta	4%	4%
Detroit	3%	3%
Boston	2%	3%
Philadelphia	2%	3%

[1]Source: Data from Visitor Tracking Survey

TRAVEL PARTY PROFILE

Travel Parties	2023	2024
Mean travel party size	2.9[1]	2.9[1]
Travel with children under age 18	35%	33%

Travel Party Composition	2023	2024
As a family	41%	40%
As a couple	32%	37%
By yourself	12%	12%
With other couples/friends	9%	8%
With business associates	4%	2%
In a tour group	1%	<1%
Other	1%	1%

[1]Source: Visitor Tracking Survey, includes all types of visitors

TRAVEL PARTY PROFILE

Marital Status	2023	2024
Married	74%	77%
Unmarried	26%	23%

Age	2023	2024
Average age	50	51

Household Income	2023	2024
Median Income	$108,000	$107,600

ACCOMMODATIONS

Lodging Accommodations	2023	2024
Hotel/motel/resort	35%	35%
Vacation rental home	27%	26%
Personal condo, house, timeshare, etc.	16%	17%
Friends/family home	15%	15%
Campground/RV Park	2%	3%
Bed & Breakfast/Inn	2%	2%
Not spending the night	2%	1%
Other	1%	1%

TRIP EXPERIENCE

Length of Stay[1]	2023	2024
Average nights in the Fort Myers area	6.5	6.4

First time/Repeat Visitors	2023	2024
First-time	29%	25%
Repeat	71%	75%

[1]Sources: Occupancy Study for visitors staying in paid accommodations and Visitor Tracking Survey for all other visitors

TRIP EXPERIENCE

Activities[1]	2023	2024
Relax and unwind	62%	67%
Restaurants	62%	63%
Beach	49%	59%
Visit friends/relatives	41%	47%
Shopping	40%	41%
Fishing	22%	25%
Nature, environment, bird watching	21%	22%
Water sports	17%	19%
Golf, tennis, or pickleball	14%	18%
Attractions	11%	15%
Bars, nightclubs	15%	14%
Biking, hiking	13%	12%
Attend or participate in a sporting event	9%	10%
Special occasion	7%	9%
Photography	10%	9%
Special events	7%	8%
Culture	6%	7%
Museums, history	6%	7%
Guided tours	5%	7%
Spas	5%	6%
Diving, snorkeling	6%	6%
Business meetings/conferences	5%	3%
Volunteering	6%	3%
Other	3%	2%

[1] Multiple responses permitted.

TRIP EXPERIENCE

Attractions[1]	2023	2024
Beaches	51%	60%
Bell Tower Shops	22%	24%
Edison & Ford Winter Estates	19%	23%
Sanibel Lighthouse	15%	23%
Gulf Coast Town Center	18%	17%
Coconut Point Mall	16%	16%
Miromar Outlets Mall	17%	14%
Fort Myers Beach Pier Area[2]	15%	13%
Shell Factory and Nature Park[3]	13%	10%
J.N. Ding Darling National Wildlife Refuge	7%	8%
Bailey-Matthews Shell Museum	6%	6%
Manatee Park	5%	6%
Broadway Palm Dinner Theater	2%	4%
Periwinkle Place	<1%	3%
Barbara B. Mann Performing Arts Hall	2%	2%
Other	4%	3%
None	14%	14%

[1] Multiple responses permitted.
[2] Represents visitors who spent time on the beach area near where the pier was.
[3] Closed down in September 2024.

TRIP EXPERIENCE

Area stayed	2023	2024
Fort Myers	39%	34%
Cape Coral	18%	18%
Fort Myers Beach	10%	12%
Bonita Springs	9%	9%
Sanibel Island	4%	7%
Estero	7%	7%
Captiva Island	3%	4%
North Fort Myers	3%	3%
Lehigh Acres	2%	2%
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	2023	2024
Very Likely	47%	52%
Likely	43%	41%
Unsure/don't know	8%	5%
Unlikely	2%	1%
Very Unlikely	<1%	1%

Satisfaction with Accommodations	2023	2024
Exceeded expectations	37%	43%
Met expectations	56%	53%
Did not meet expectations	7%	4%

POST-TRIP EVALUATION

Likelihood of Returning to the Area	2023	2024
Very Likely	52%	56%
Likely	34%	33%
Unsure/don't know	12%	10%
Unlikely	2%	1%
Very Unlikely	<1%	<1%

Likelihood of Returning to the Area Next Year	2023	2024
Very Likely	46%	50%
Likely	29%	23%
Unsure/don't know	22%	23%
Unlikely	2%	3%
Very Unlikely	1%	1%

POST-TRIP EVALUATION

Satisfaction with Visit	2023	2024
Very satisfied	54%	56%
Satisfied	39%	39%
Neither	4%	3%
Dissatisfied/Very dissatisfied	1%	1%
Don't know	2%	1%

Satisfaction with Customer Service	2023	2024
Very satisfied	54%	56%
Satisfied	38%	37%
Neither	5%	4%
Dissatisfied/Very dissatisfied	1%	1%
Don't know	2%	2%

POST-TRIP EVALUATION

Visitor Concerns[1]	2023	2024
Traffic	31%	36%
Damaged buildings, signs, and landscapes	21%	19%
High Prices	18%	18%
Insects	13%	14%
Construction noise/activity	6%	13%
Weather	5%	6%
Beach seaweed	6%	6%
Red tide	10%	6%
Water quality	6%	5%
Lack of nightlife	6%	4%
Quality of accommodations	3%	2%
Other	2%	2%
Nothing	26%	23%

[1]Multiple responses permitted.

Quarterly Comparisons

ECONOMIC IMPACT

Visitor & Lodging Statistics	January – March	April – June	July – September	October – December
Visitors	828,300	808,900	695,100	867,200
Visitor Days	5,880,900	4,999,000	4,128,900	5,411,300
Room Nights	1,411,300	1,029,300	885,700	1,078,700
Direct Expenditures	$1,047,587,600	$747,288,600	$633,798,700	$679,771,800
Total Economic Impact	$1,668,807,000	$1,190,430,700	$1,009,641,300	$1,082,876,500
Occupancy	74.0%	55.8%	47.2%	58.0%
ADR	$224.56	$170.05	$146.09	$154.37
RevPAR	$166.17	$94.89	$68.95	$89.54

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM

	January – March	April – June	July – September	October – December
Direct Jobs	10,630	7,610	6,310	6,910
Total Jobs[1]	14,190	10,200	8,480	9,280
Direct Wages	$407,091,500	$262,529,500	$218,375,300	$238,021,100
Total Wages[1]	$584,221,100	$370,708,400	$309,675,900	$336,651,000
Direct Local Taxes	$46,995,500	$32,670,701	$13,867,600	$14,686,800
Total Local Taxes[1]	$62,036,100	$43,227,443	$18,255,200	$19,434,300
Direct State Taxes	$47,931,600	$34,995,472	$30,043,600	$31,815,300
Total State Taxes[1]	$63,618,200	$46,560,335	$39,766,100	$42,331,700

[1]"Total" wages and taxes are greater than "direct" wages and taxes because visitors direct spending is recirculated throughout the Lee County economy as employees and employers buy products and services with visitors' dollars.

VISITOR TYPE

Visitor Type	January – March	April – June	July – September	October –December
Visitors in Paid Accommodations	67%	66%	68%	65%
Visitors in Non-Paid Accommodations	32%	33%	30%	34%
Day Trippers	1%	1%	2%	1%

PRE-VISIT

Planned trip in advance	January – March	April – June	July –September	October – December
1 week or less	6%	5%	6%	5%
2-4 weeks	11%	12%	14%	13%
1-2 months	31%	39%	40%	38%
3-6 months	32%	31%	29%	31%
6 months or more	19%	13%	11%	12%
Not sure	1%	<1%	<1%	1%

Considered Other Destinations	January – March	April – June	July – September	October – December
Yes	32%	29%	38%	24%
No	68%	71%	62%	76%

PRE-VISIT

Trip Planning Websites[1]	January – March	April – June	July – September	October – December
Airline websites/apps	29%	33%	35%	36%
Online search engines	25%	28%	28%	29%
Airbnb, Vrbo, etc.	22%	22%	20%	19%
Hotel websites/apps	15%	16%	16%	16%
Booking websites	13%	19%	17%	16%
Vacation rental websites/apps	12%	18%	14%	12%
Tripadvisor	11%	9%	11%	11%
www.VisitFortMyers.com	8%	7%	6%	10%
Traveler reviews, blogs, stories	9%	8%	10%	7%
Visit Florida	5%	5%	8%	11%
VCB Facebook Page	6%	7%	6%	8%
Facebook	7%	5%	7%	7%
Instagram	4%	3%	6%	6%
Streaming websites/apps	3%	3%	3%	4%
None	25%	22%	19%	23%
Other	4%	3%	4%	2%

[1]Multiple responses permitted.

PRE-VISIT

Information Requests[1]	January – March	April – June	July –September	October – December
Calling a hotel, motel, condo	20%	20%	28%	19%
Requesting and receiving a visitor guide	6%	5%	8%	10%
Calling the VCB	2%	5%	3%	3%
Receiving the VCB e-newsletter	2%	2%	2%	6%
Calling a local Chamber of Commerce	1%	1%	2%	3%
Other	3%	2%	1%	1%
None	75%	74%	62%	68%

[1]Multiple responses permitted.

PRE-VISIT

Characteristics influencing decision to visit Lee County (top 2 boxes)	January – March	April – June	July –September	October – December
Warm weather	88%	91%	84%	89%
Peaceful/relaxing	84%	90%	88%	88%
A safe destination	78%	86%	84%	84%
White sandy beaches	75%	83%	83%	79%
Plenty to see and do	75%	79%	77%	78%
Convenient location	76%	78%	75%	77%
Clean, unspoiled environment	67%	76%	79%	77%
A "family" atmosphere	68%	78%	77%	75%
Value for your travel dollar	63%	74%	71%	72%
Memories of visiting/nostalgia	59%	71%	71%	72%
Reasonably priced lodging	55%	65%	66%	68%

PRE-VISIT

Recall of Lee County Promotions	January – March	April – June	July –September	October – December
Yes	44%	37%	38%	35%

Source of Recalled Promotions	January – March	April – June	July –September	October – December
Internet	44%	44%	51%	52%
Social media	32%	35%	36%	37%
Traveler reviews, blogs	17%	18%	22%	22%
Television	15%	14%	10%	16%
www.VisitFortMyers.com	10%	9%	9%	13%
Magazine	9%	9%	8%	10%
Travel/visitor guide	8%	8%	8%	11%
Newspaper	10%	8%	4%	8%
Email/e-newsletter	7%	8%	6%	7%
Video streaming services	7%	5%	7%	6%
Billboard	5%	5%	4%	5%
Brochure	5%	6%	3%	4%
Radio	3%	3%	2%	7%
AAA	7%	4%	3%	4%
Deal-based promotion	1%	1%	2%	6%
Music streaming services	1%	1%	2%	1%
Podcasts	1%	<1%	2%	2%
Other	3%	3%	3%	3%

PRE-VISIT

Transportation	January – March	April – June	July – September	October – December
Fly	66%	66%	73%	71%
Drive a personal vehicle	25%	30%	24%	24%
Drive a rental vehicle	7%	3%	3%	3%
Drive a RV	1%	1%	<1%	1%
Travel by bus	<1%	<1%	<1%	<1%
Other	1%	<1%	<1%	1%

Airport Used	January – March	April – June	July – September	October – December
Southwest Florida International	85%	81%	85%	75%
Punta Gorda	7%	13%	10%	8%
Miami International	1%	2%	1%	9%
Ft. Lauderdale International	2%	2%	2%	4%
Tampa International	2%	<1%	1%	3%
Orlando International	1%	1%	<1%	1%
Other	2%	1%	1%	<1%

TRAVEL PARTY PROFILE

Visitor Origin Regions	January – March	April – June	July – September	October – December
Midwest	42.5%	33.4%	31.5%	30.0%
Northeast	22.9%	18.6%	18.4%	19.7%
Southeast	16.2%	20.5%	19.8%	19.4%
West	5.1%	10.2%	9.2%	9.0%
Florida	4.6%	8.7%	5.6%	8.6%
Canada	5.5%	5.0%	7.5%	6.7%
Germany	0.5%	1.4%	3.4%	3.1%
UK	0.9%	0.6%	1.3%	1.4%
Other Europe	0.6%	0.4%	1.7%	1.0%
Other International	1.2%	1.2%	1.6%	1.1%

TRAVEL PARTY PROFILE

Visitor Origin Markets	January – March	April – June	July – September	October – December
Chicago	3%	5%	5%	6%
New York	4%	5%	6%	5%
Minneapolis-Saint Paul	8%	4%	3%	3%
Atlanta	3%	4%	4%	5%
Detroit	4%	3%	3%	3%
Boston	4%	3%	2%	3%
Philadelphia	3%	2%	2%	3%
Indianapolis	2%	3%	2%	1%
Washington, DC-Hagerstown	1%	2%	2%	3%
Cleveland-Akron	2%	2%	3%	2%
Denver	1%	2%	2%	3%
Cincinnati	1%	2%	2%	1%
Miami-Fort Lauderdale	1%	2%	1%	3%

TRAVEL PARTY PROFILE

Travel Parties	January – March	April – June	July – September	October – December
Mean travel party size[1]	2.7	3.0	3.0	3.0
Travel with children under age 18	27%	34%	37%	36%

Travel Party Composition	January – March	April – June	July – September	October – December
As a family	35%	40%	47%	38%
As a couple	39%	38%	33%	36%
By yourself	11%	10%	11%	16%
With other couples/friends	10%	9%	8%	6%
With business associates	3%	2%	1%	3%
In a tour group	1%	<1%	<1%	<1%
Other	1%	1%	<1%	1%

[1]Source: Visitor Tracking Survey, includes all types of visitors

TRAVEL PARTY PROFILE

Marital Status	January – March	April – June	July – September	October – December
Married	76%	78%	75%	80%
Unmarried	24%	22%	25%	20%

Age	January – March	April – June	July – September	October – December
Median age	53	50	49	51

Household Income	January – March	April – June	July – September	October – December
Median Income	$105,700	$106,800	$108,700	$108,700

TRIP EXPERIENCE

Length of Stay	January – March	April – June	July – September	October – December
Average nights stayed in the Fort Myers Area	7.1	6.2	5.9	6.2

First time/Repeat Visitors	January – March	April – June	July – September	October – December
First-time	25%	26%	30%	21%
Repeat	75%	74%	70%	79%

TRIP EXPERIENCE

Activities[1]	January – March	April – June	July – September	October – December
Relax and unwind	65%	72%	69%	63%
Restaurants	63%	63%	63%	64%
Beach	54%	68%	64%	53%
Visit friends/relatives	45%	51%	42%	48%
Shopping	38%	39%	42%	45%
Fishing	20%	26%	26%	27%
Nature, environment, bird watching	22%	24%	25%	19%
Water sports	16%	22%	23%	16%
Golf, tennis, or pickleball	17%	17%	16%	21%
Attractions	17%	15%	16%	14%
Bars, nightclubs	16%	13%	11%	16%
Biking, hiking	14%	9%	11%	14%
Attend or participate in a sporting event	21%	5%	3%	8%
Special occasion	5%	12%	8%	11%
Photography	9%	8%	8%	10%
Special events	9%	8%	5%	8%
Culture	7%	8%	5%	9%
Museums, history	9%	9%	5%	7%
Guided tours	7%	8%	6%	7%
Spas	4%	3%	7%	9%
Diving, snorkeling	4%	6%	7%	8%
Business meetings/conferences	3%	3%	3%	4%
Volunteering	4%	3%	1%	4%
Other	4%	1%	3%	1%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Attractions[1]	January – March	April – June	July – September	October – December
Beaches	53%	68%	66%	54%
Bell Tower Shops	21%	29%	21%	24%
Edison & Ford Winter Estates	24%	26%	20%	23%
Sanibel Lighthouse	14%	26%	28%	25%
Gulf Coast Town Center	15%	17%	15%	21%
Coconut Point Mall	16%	15%	14%	20%
Miromar Outlets Mall	15%	12%	10%	20%
Fort Myers Beach Pier Area[2]	15%	10%	15%	14%
Shell Factory and Nature[3]	13%	15%	14%	0%
J.N. Ding Darling National Wildlife Refuge	8%	8%	10%	7%
Bailey-Matthews Shell Museum	3%	6%	8%	8%
Manatee Park	13%	3%	3%	6%
Broadway Palm Dinner Theater	5%	2%	3%	5%
Periwinkle Place	<1%	3%	6%	2%
Barbara B. Mann Performing Arts Hall	3%	2%	1%	3%
Other	4%	4%	2%	3%
None	16%	11%	14%	17%

[1]Multiple responses permitted.
[2]Represents visitors who spent time on the beach area near where the pier was.
[3]Closed down in September 2024.

TRIP EXPERIENCE

Area stayed	January – March	April – June	July – September	October – December
Fort Myers	36%	33%	34%	38%
Cape Coral	21%	18%	15%	16%
Fort Myers Beach	11%	11%	16%	12%
Bonita Springs	10%	11%	6%	9%
Sanibel Island	3%	7%	10%	7%
Estero	7%	6%	6%	8%
Captiva Island	3%	6%	6%	2%
North Fort Myers	3%	2%	3%	3%
Lehigh Acres	2%	2%	2%	1%
Pine Island	1%	1%	<1%	1%
Boca Grande/Outer Islands	<1%	1%	<1%	1%
Along I-75	2%	1%	<1%	1%
None/not staying overnight	1%	1%	2%	1%

POST-TRIP EVALUATION

Likelihood of Recommending	January – March	April – June	July – September	October – December
Very Likely	60%	49%	55%	45%
Likely	31%	44%	39%	47%
Unsure/don't know	7%	6%	4%	6%
Unlikely	1%	1%	2%	1%
Very Unlikely	1%	<1%	<1%	1%

Satisfaction with Accommodations	January – March	April – June	July – September	October – December
Exceeded expectations	38%	45%	45%	43%
Met expectations	56%	50%	52%	54%
Did not meet expectations	6%	5%	3%	3%

POST-TRIP EVALUATION

Likelihood of Returning	January – March	April – June	July – September	October – December
Very Likely	64%	53%	57%	50%
Likely	25%	38%	33%	38%
Unsure/don't know	10%	8%	9%	10%
Unlikely	1%	1%	1%	1%
Very Unlikely	<1%	<1%	<1%	1%

Likelihood of Returning Next Year	January – March	April – June	July – September	October – December
Very Likely	54%	47%	52%	48%
Likely	21%	26%	25%	21%
Unsure/don't know	20%	22%	20%	29%
Unlikely	4%	4%	2%	1%
Very Unlikely	1%	1%	1%	1%

POST-TRIP EVALUATION

Satisfaction with Visit	January – March	April – June	July – September	October – December
Very satisfied	59%	57%	60%	51%
Satisfied	35%	39%	37%	43%
Neither	4%	2%	2%	4%
Dissatisfied/Very dissatisfied	1%	1%	1%	1%
Don't know	1%	1%	<1%	1%

Satisfaction with Customer Service	January – March	April – June	July – September	October – December
Very satisfied	58%	56%	59%	53%
Satisfied	34%	39%	35%	40%
Neither	5%	3%	3%	4%
Dissatisfied/Very dissatisfied	1%	1%	1%	1%
Don't know	2%	1%	2%	2%

POST-TRIP EVALUATION

Visitor Concerns[1]	January – March	April – June	July – September	October – December
Traffic	51%	32%	27%	31%
Damaged buildings, etc.	16%	24%	23%	15%
High Prices	18%	15%	18%	20%
Insects	8%	16%	21%	12%
Red tide	7%	16%	14%	14%
Water quality	5%	6%	9%	5%
Construction noise/activity	3%	7%	10%	4%
Lack of nightlife	8%	5%	4%	5%
Beach seaweed	4%	5%	5%	7%
Weather	4%	4%	5%	5%
Quality of accommodations	2%	2%	2%	3%
Other	<1%	3%	3%	1%
Nothing	23%	23%	21%	24%

[1]Multiple responses permitted.

Methodology

METHODOLOGY

- Economic Impact of tourism in Lee County is derived from:
  - Visitor Tracking Study
    - In-person interviews in public areas, hotels, & at events around Lee County and online surveys
    - Sample size: 3,543 completed interviews
    - Target individuals: Visitors to Lee County
    - Data Collection: January 2024 – December 2024
  - Occupancy Study
    - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc., and the STR Report
  - 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

Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

Calendar Year 2024
Visitor Tracking, Occupancy & Economic Impact Study

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fort MYERS
ISLANDS, BEACHES
& NEIGHBORHOODS

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