Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

July - Sept 2023

Visitor Tracking, Occupancy & Economic Impact Study

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

July - Sept 2023

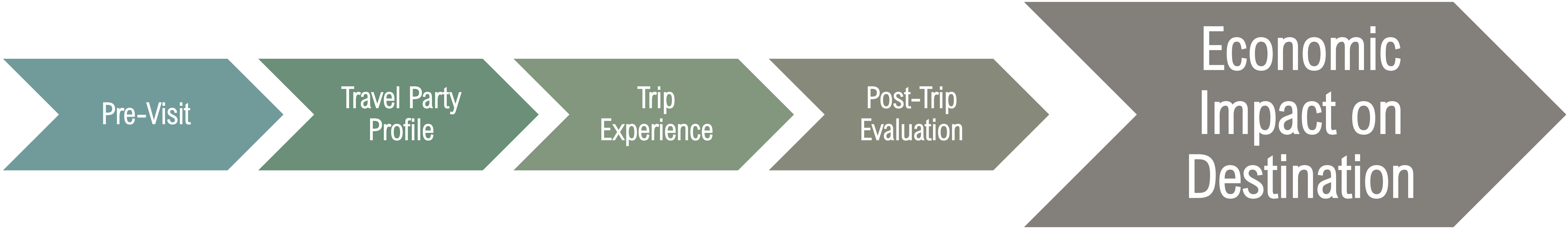
- Due to Hurricane Ian, tourism metrics for the Fort Myers area are still down across the board as the recovery process remains ongoing.
- **Visitation** was **down 36.6%** and **room nights** were **down 31.6%.**
  - The drop in room nights was not as steep as the drop in visitation due to an increased length of stay and smaller travel party size compared to Jul-Sep 2022.
- The **proportion of visitors** who stayed in **unpaid accommodations** remained at an **elevated level** of **31%**, **up from 22%** in July-September 2022.
- The **proportion of first-time visitors decreased from 42% to 33%,** while the proportion of **loyal visitors increased from 11% to 21%**, signaling **the return of many long-time visitors to the area.**
- The **proportion of international visitors** again saw an **increase** compared to the same period last year. However, this **still represents** a **34% decrease** in the actual **number of international visitors.**

50.6%	$134.26	$67.94
OCCUPANCY RATE	**AVERAGE DAILY RATE**	**REVENUE PER ROOM**
↓ 5.5% pts from 2022	↓ 19.9% from 2022	↓ 27.8% from 2022

fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

downs & st. germain RESEARCH

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION



TOURISM SNAPSHOT: KEY METRICS July - Sept 2022 VS. 2023

Visitor & Lodging Statistics	Jul - Sep 2022	Jul - Sep 2023	% Change '22-'23
Visitors	1,114,000	706,700	-36.6%
Visitor Days	5,618,600	4,113,000	-26.8%
Room Nights	1,265,400	865,200	-31.6%
Direct Expenditures[1]	$812,265,900	$584,185,900	-28.1%
Total Economic Impact[2]	$1,293,939,600	$935,281,600	-27.7%

[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 YEAR TO DATE

Visitor & Lodging Statistics	CYTD 2022	CYTD 2023	% Change '22-'23
Visitors	3,717,600	2,170,200	-41.6%
Visitor Days	22,451,800	14,674,800	-34.6%
Room Nights	5,000,100	3,298,700	-34.0%
Direct Expenditures[1]	3,429,379,200	$2,235,399,600	-34.8%
Total Economic Impact[2]	5,463,001,100	$3,578,874,800	-34.5%

[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.

JULY-SEPT LODGING STATISTICS

50.6%	$134.26	$67.94
Occupancy	ADR	RevPAR
↓ 5.5% pts	↓ 19.9%	↓ 27.8%
From 2022	From 2022	From 2022

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

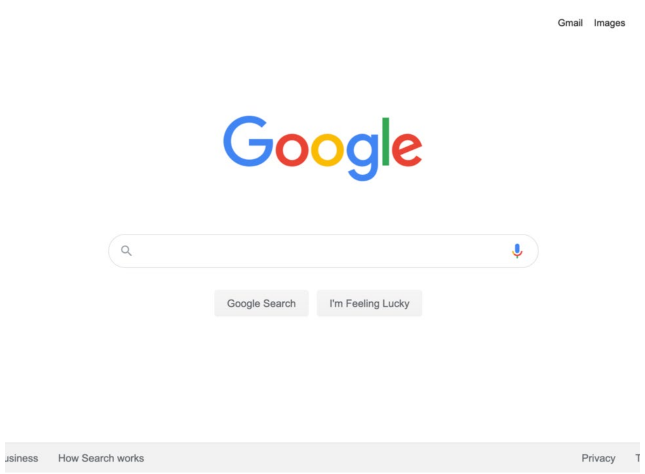
- The average trip planning cycle was nearly 3 months

- Over 2 in 5 visitors requested information to plan their trips
  - 1 in 3 visitors called a hotel, motel, or condo
  - 9% of visitors requested a visitor guide

- 43% of visitors considered choosing other destinations when planning their trips

TRIP PLANNING: WEBSITES/APPS USED

- Over 4 in 5 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]:



31% Search Engines

30% Airline Websites/Apps

21% Airbnb, VRBO, HomeAway, or similar websites

[1]Multiple responses permitted.

TOP TRIP INFLUENCES

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

91% Peaceful/relaxing

87% A safe destination

86% Warm weather

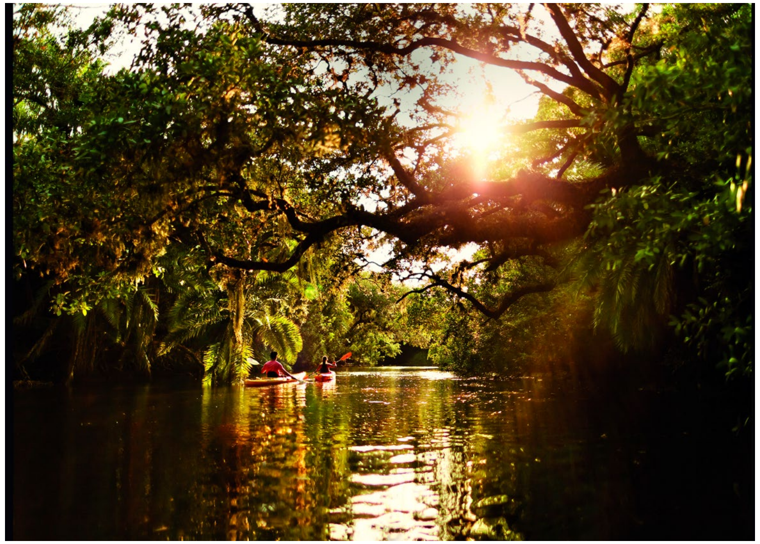
86% White Sandy Beaches

[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]:

40% Beach



38% Relax & Unwind

23% Visiting Friends & Relatives

[1]Three responses permitted.

PROMOTION RECALL

- **Over 2 in 5** visitors **recalled promotions** in the past 6 months for the Fort Myers area
- **21%** of all visitors **were influenced** to come to the Fort Myers area by these promotions
- Top sources of recall include[1]:

56% Internet

39% Social media

27% Traveler reviews, blogs

10% Television

[1]Multiple responses permitted.

BOOKING

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

37% Directly with hotel/condo

22% Online travel agency

16% Airbnb

15% VRBO, HomeAway

7% Vacation rental company

TRANSPORTATION

- **78%** of visitors **flew** to the Fort Myers area
- **67%** of all visitors traveled to the Fort Myers area via **RSW**

VISITOR JOURNEY: TRAVEL PARTY PROFILE

Pre-Visit

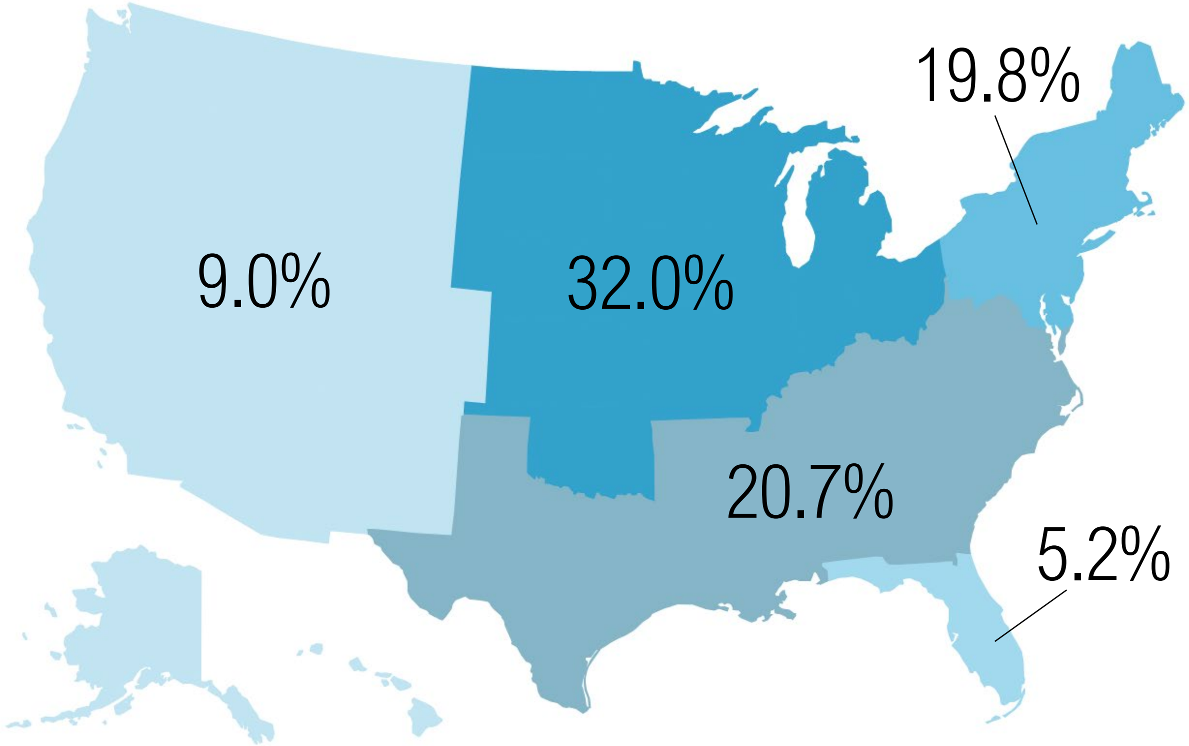
Travel Party Profile

Trip Experience

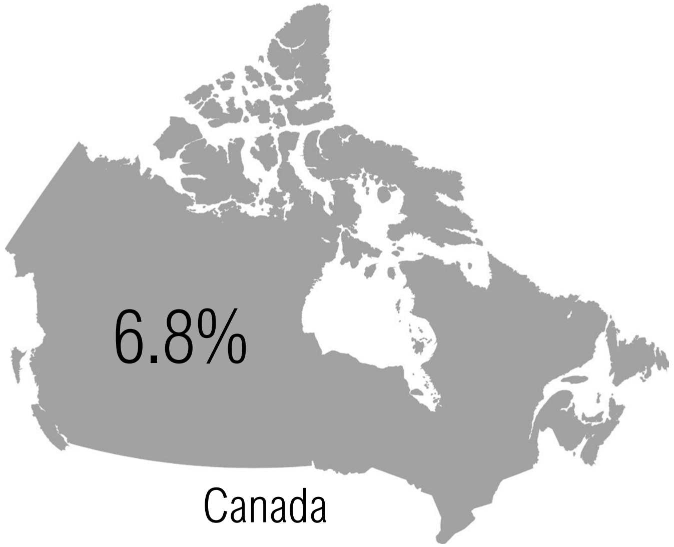
Post-Trip Evaluation

Economic Impact on Destination

ORIGIN REGION[1]



US = 86.7%



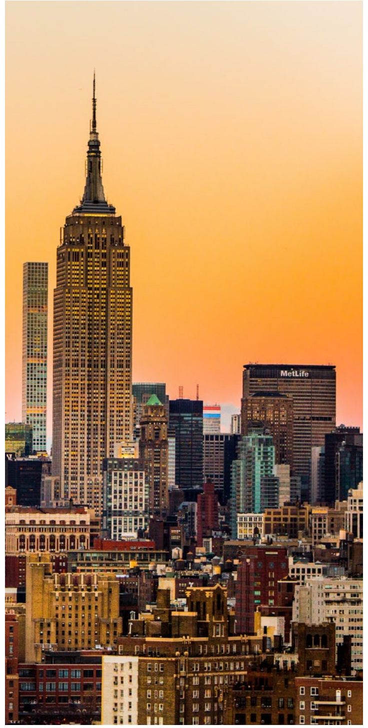
Canada

6.5% Other International Markets

(Germany, UK, etc.)

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

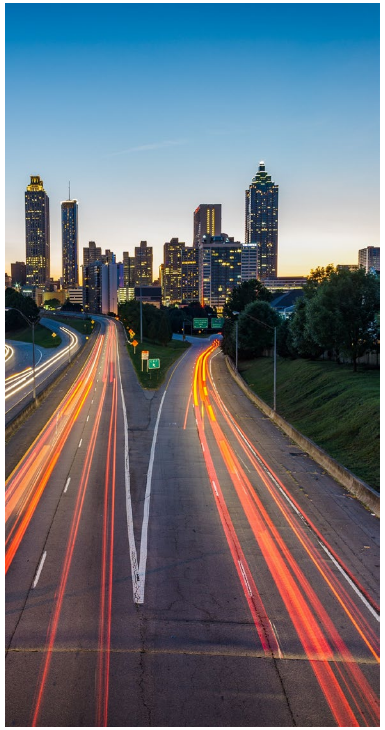
TOP ORIGIN MARKETS[1]



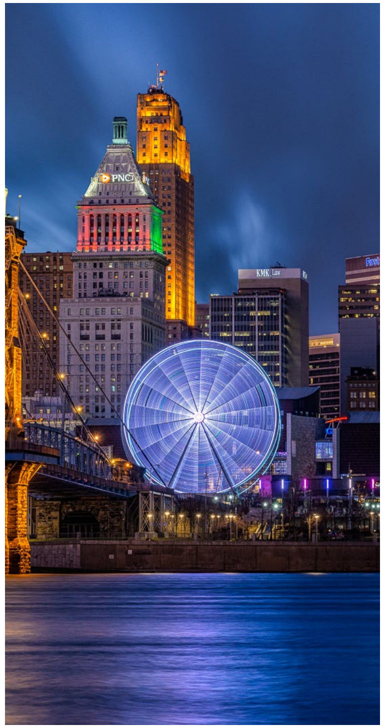
9% New York

5% Chicago

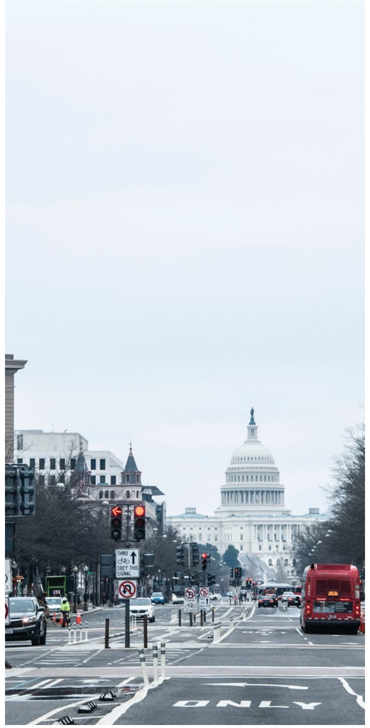
5% Cleveland



4% Atlanta



3% Cincinnati



3% Washington, D.C.

[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]
- 44% traveled with children
- Over half of visitors traveled as a family, while over 1 in 4 traveled as a couple, 8% traveled solo, and 7% traveled with other couples/friends

[1]Sources: Occupancy Study and Visitor Tracking Study

DEMOGRAPHIC PROFILE[1]

July - Sept Visitors:

- Median age of 47 years old
- Median household income of $105,600
- Married (73%)
- College educated (66%)
- Caucasian/white (76%)
- Female (50%)

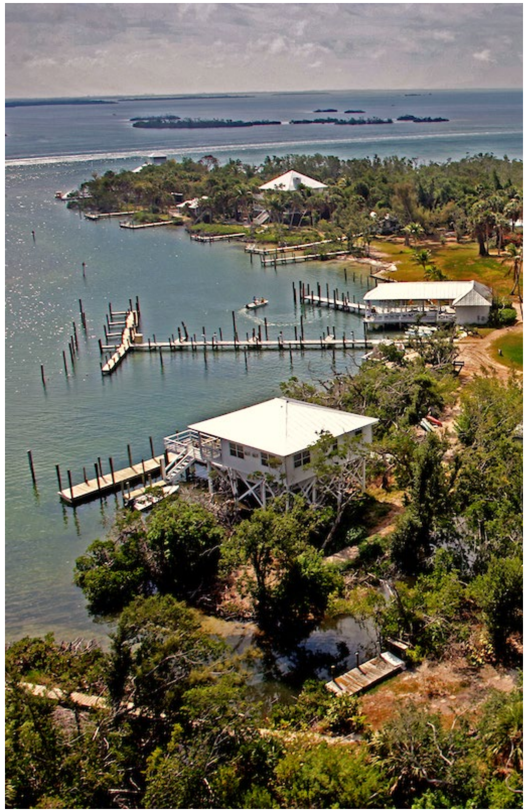
[1]Of people interviewed.

Visitor Journey: Trip Experience

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

TOP ACCOMMODATIONS

32% Hotel/Motel/Resort



30% Condo/Vacation Rental

17% Personal second home, etc.

14% Staying with friends/relatives

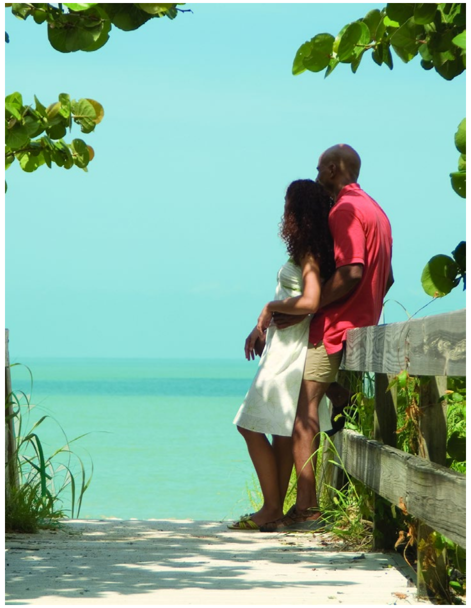
LENGTH OF STAY & NUMBER OF TIMES IN DESTINATION

- Visitors[1] spent an average of 5.8 nights in the Fort Myers area
- 33% were first time visitors
- 21% have visited more than 10 times

[1]Sources: Occupancy Study and Visitor Tracking Study

VISITOR ACTIVITIES

- Top visitor activities include[1]:



65% Relaxing & unwinding

58% Beach

57% Dining out

41% Shopping

35% Visit friends/relatives

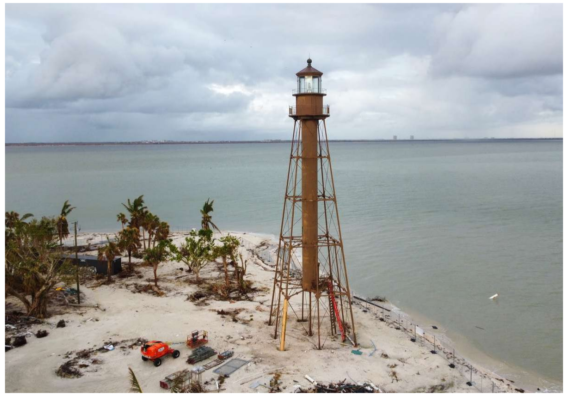
[1]Multiple responses permitted.

TOP ATTRACTIONS VISITED[1]

53% Beaches

23% Bell Tower Shops

21% Gulf Coast Town Center



18% Sanibel Lighthouse

18% Coconut Point Mall

[1]Multiple responses permitted.

TOP COMMUNITIES STAYED

34% Fort Myers

20% Cape Coral

11% Fort Myers Beach

VISITOR JOURNEY: POST-TRIP EVALUATION

SATISFACTION

- 91% of visitors are likely to recommend the area
  - 51% are very likely to recommend
- 87% of visitors are likely to return
  - 53% are very likely to return
- 77% of visitors are likely to return next year
  - 45% 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 (56% were very satisfied)
- **93%** of visitors were **satisfied or very satisfied with customer service** on their visit (59% were very satisfied)
- **92%** of visitors said paid accommodations **at least met their expectations** (41% said they exceeded expectations)

TOP ATTRIBUTE RATINGS

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

96% Peaceful/relaxing

95% A safe destination

94% Warm weather

[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 4 visitors mentioned the remaining damage to buildings, signs, and landscapes
- Nearly 1 in 4 visitors mentioned traffic as their least favorite part of their visit
- Over 1 in 4 visitors had no concerns at all about the destination

AREA DESCRIPTIONS

Peaceful/Relaxing

"Perfect place to vacation with great weather, beautiful landscapes, and family oriented."

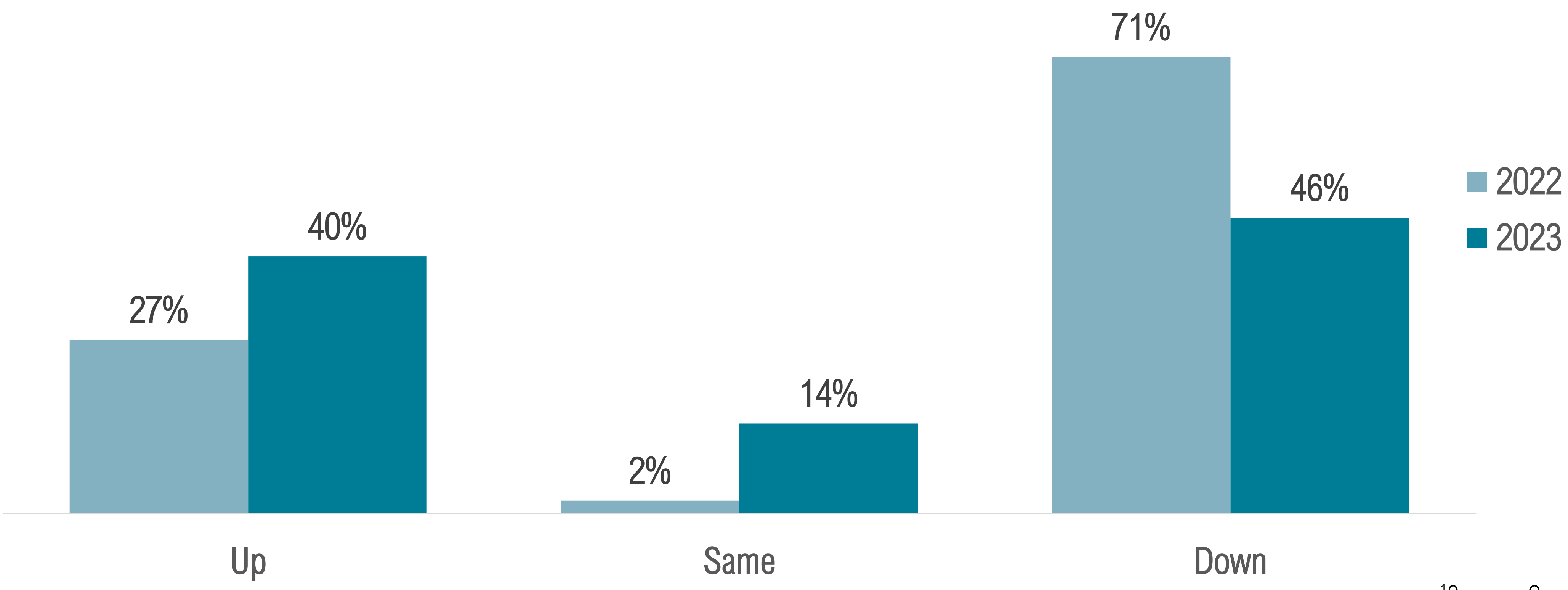
Safe Destination

"A wonderful, safe, and affordable place to visit. Amazing restaurants and variety of entertainment."

Warm Weather

"Still a very beautiful area to visit, with beautiful coastlines, great weather, and plenty of sunshine."

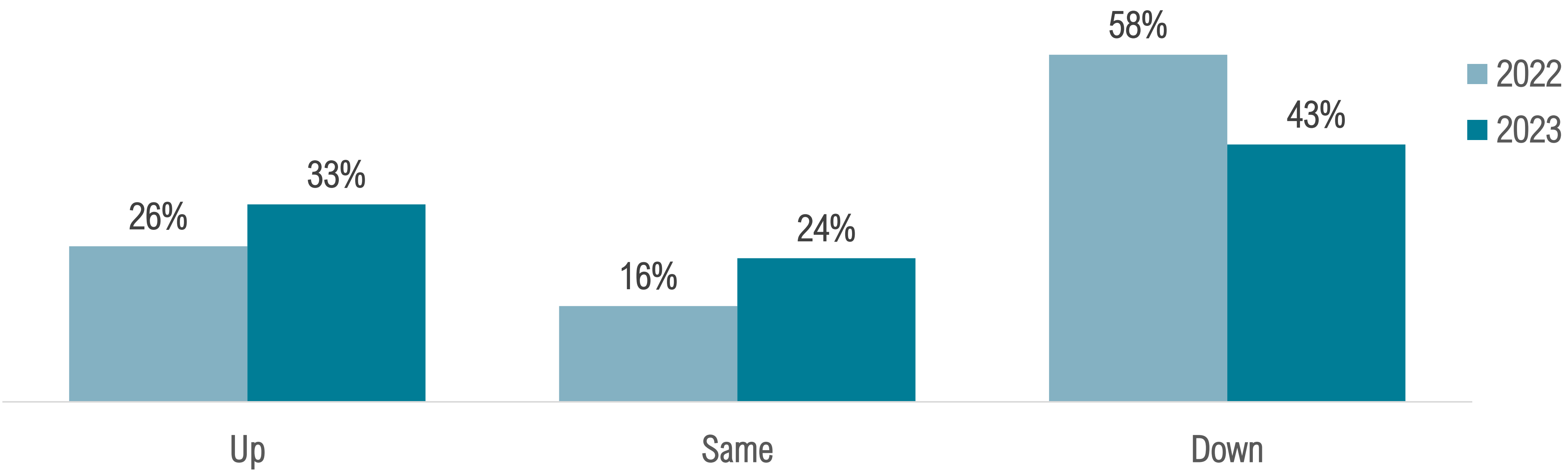
OCCUPANCY BAROMETER[1]: OCT - DEC RESERVATIONS



[1]Sources: Occupancy Survey

Accommodations partners were asked the following, "Please think about your reservations for the next three months. Compared to October - December of 2022, would you say the total level of reservations are up, the same, or down?"

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 January - March of 2022, would you say the total level of reservations are up, the same, or down?"

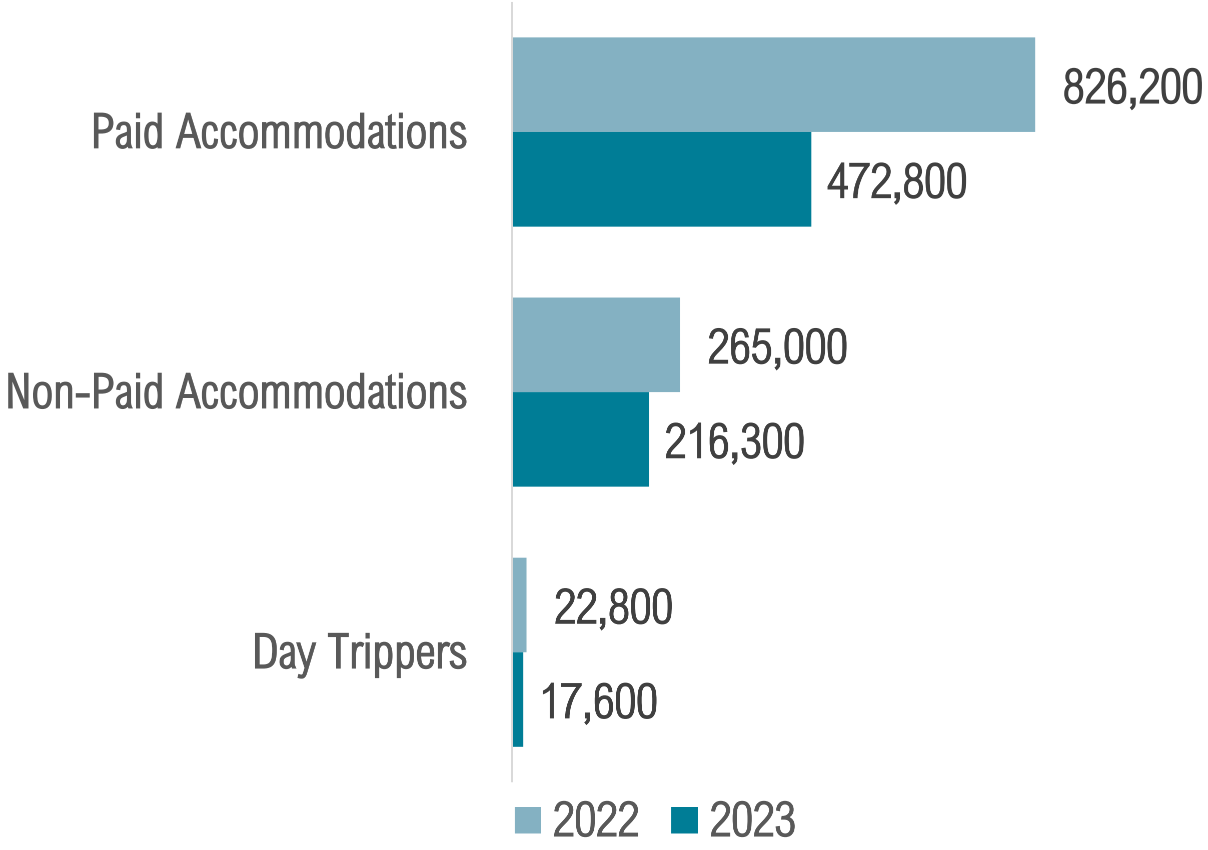
Detailed Findings

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

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

NUMBER OF VISITORS

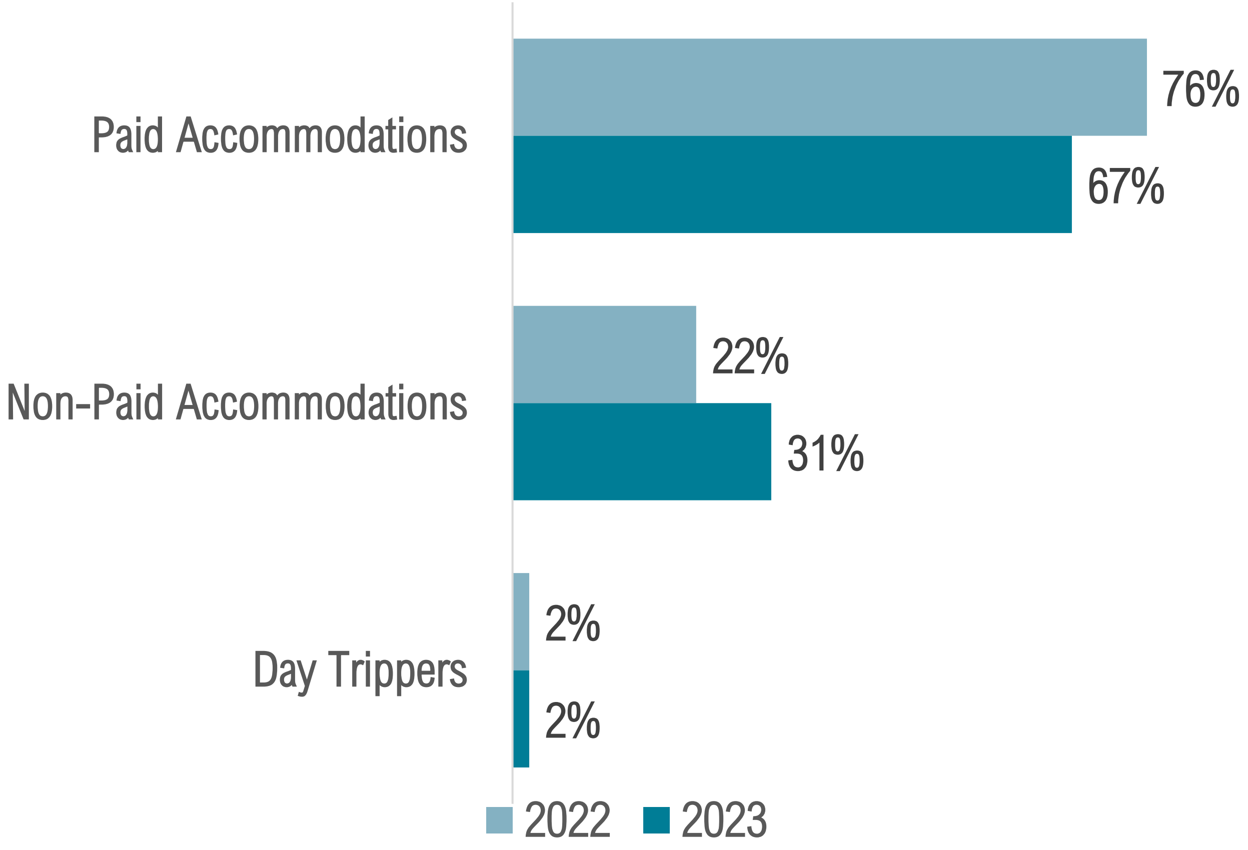
There were 706,700[1] visitors to the Fort Myers area in July - Sept 2023 (-36.6% from 2022).



[1]Sources: Visitor Tracking Study & Occupancy Survey

VISITOR TYPE

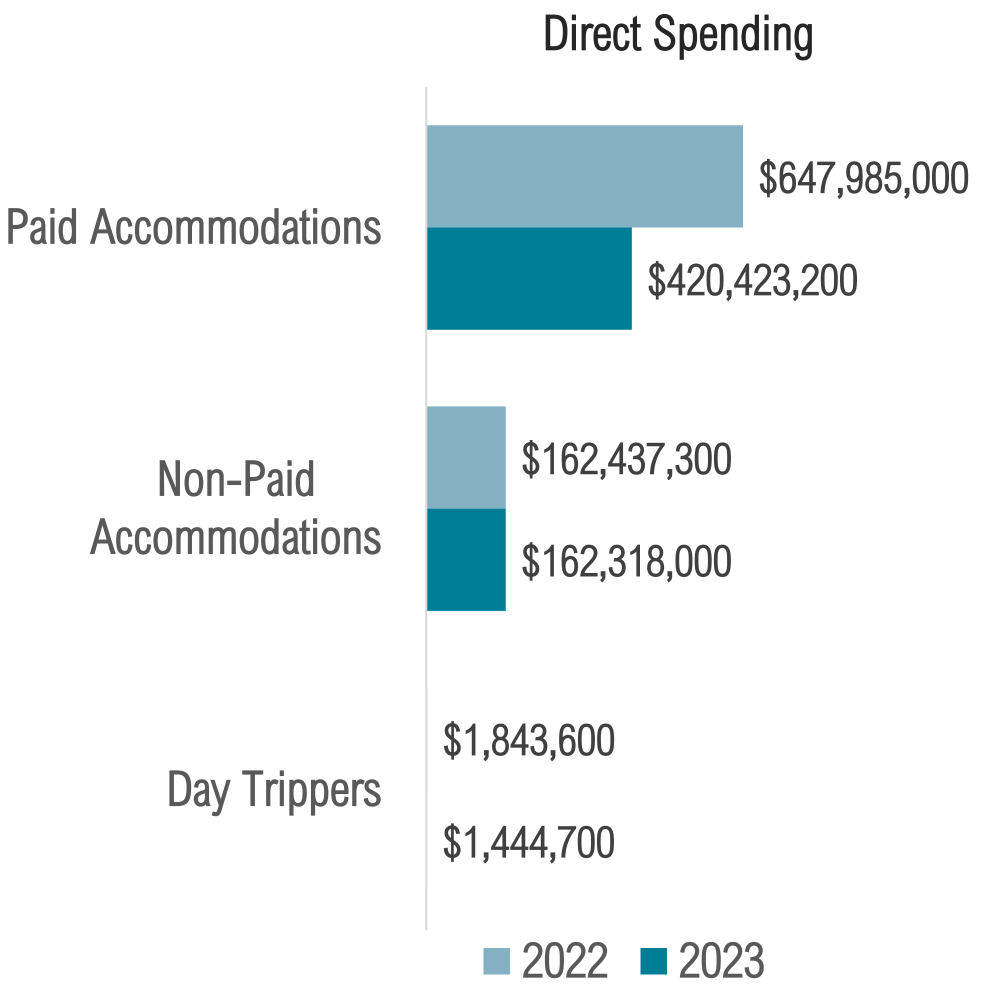
Visitors staying in paid accommodations accounted for roughly **2 in 3** visitors.



VISITOR EXPENDITURES BY VISITOR TYPE

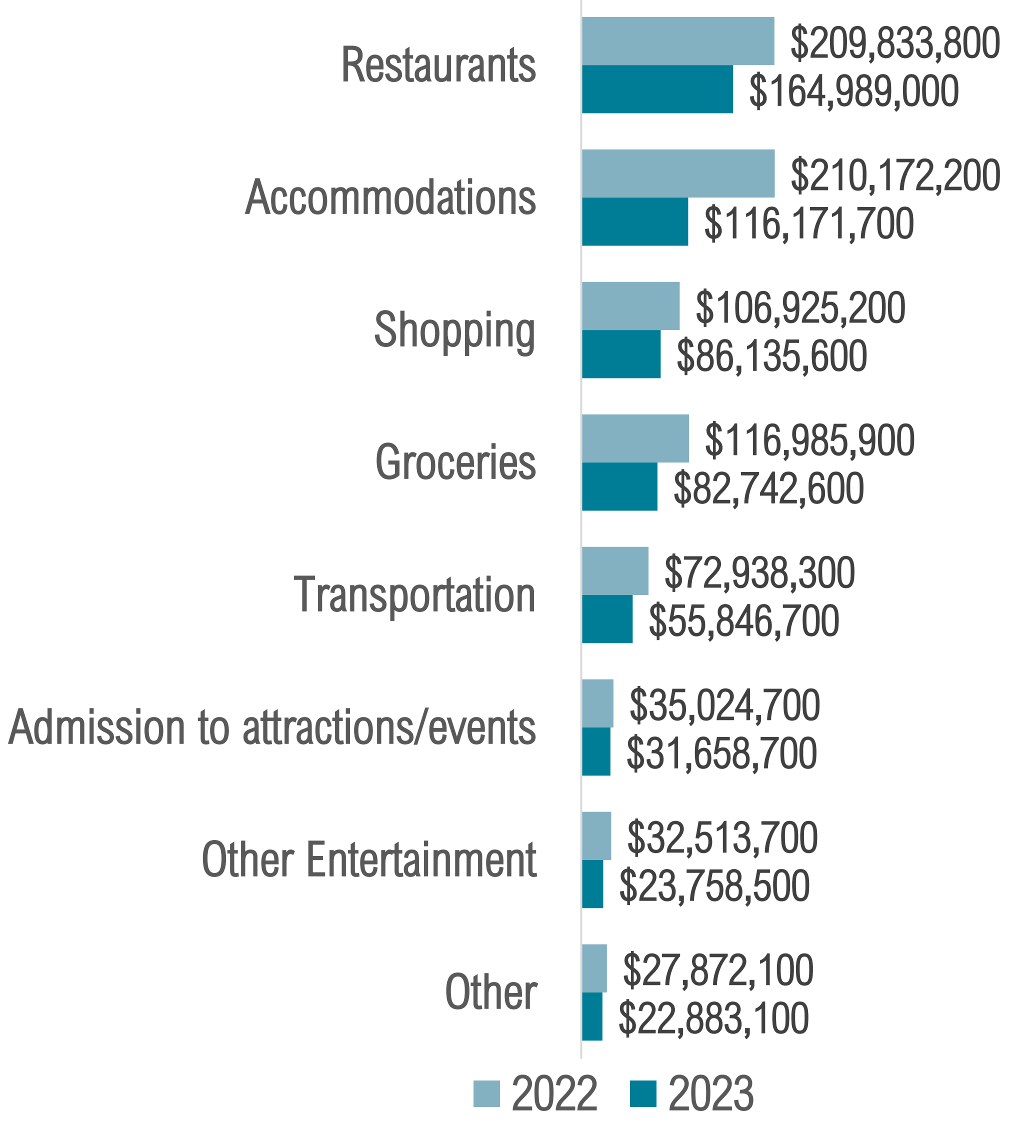
July - Sept visitors spent $584,185,900 in the Fort Myers area, resulting in a total economic impact of $935,281,600, down 27.7% from 2022.

Visitors staying in paid accommodations accounted for 67% of all visitors and 72% of all spending.



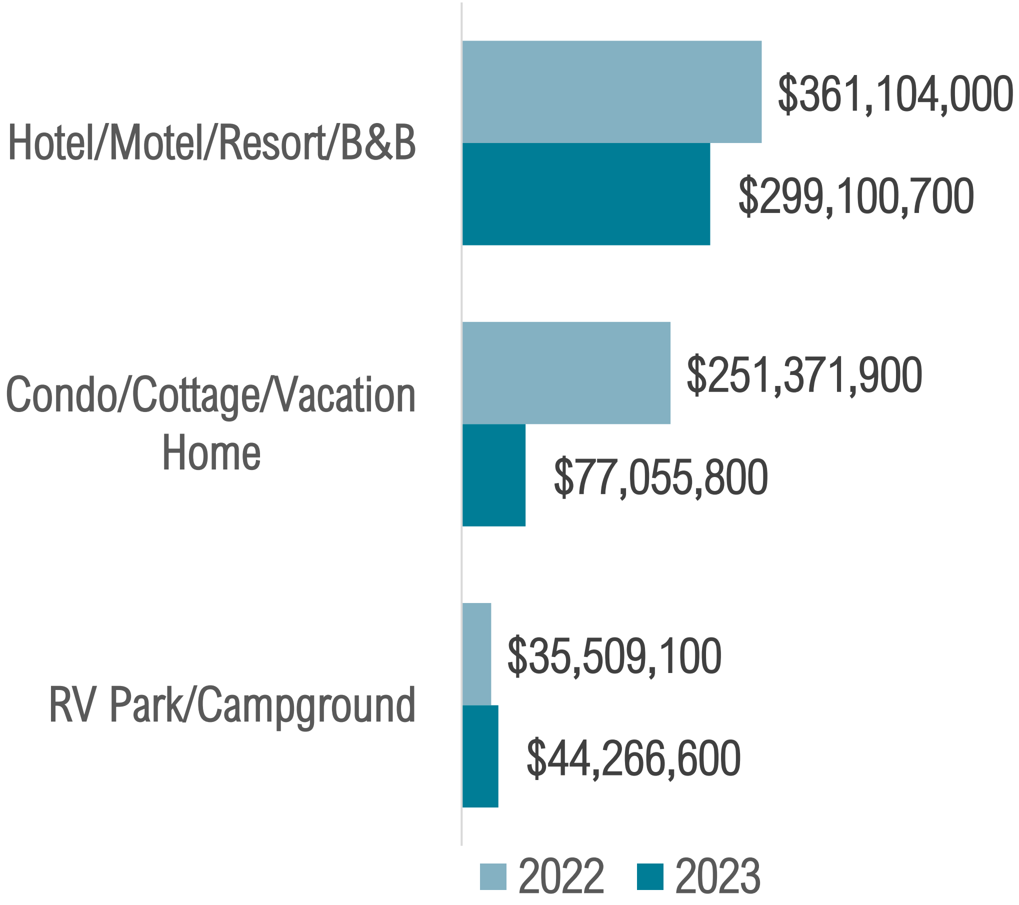
VISITOR EXPENDITURES BY SPENDING CATEGORY

Of the $584,185,900 visitors spent in the Fort Myers area, 28% was spent on restaurants and 20% was spent on accommodations, accounting for nearly half of all visitor spending.



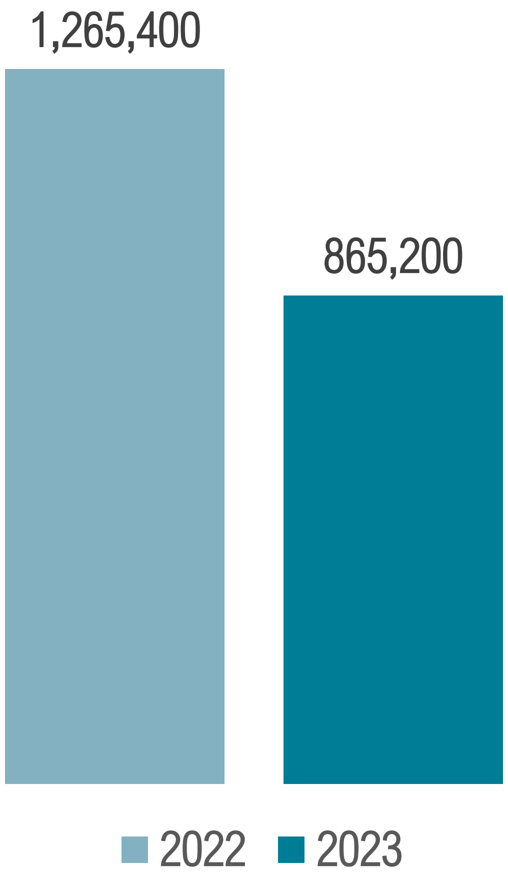
VISITOR EXPENDITURES BY LODGING TYPE

July - Sept visitors staying in paid accommodations spent $420,423,200 in the Fort Myers area.



ROOM NIGHTS GENERATED

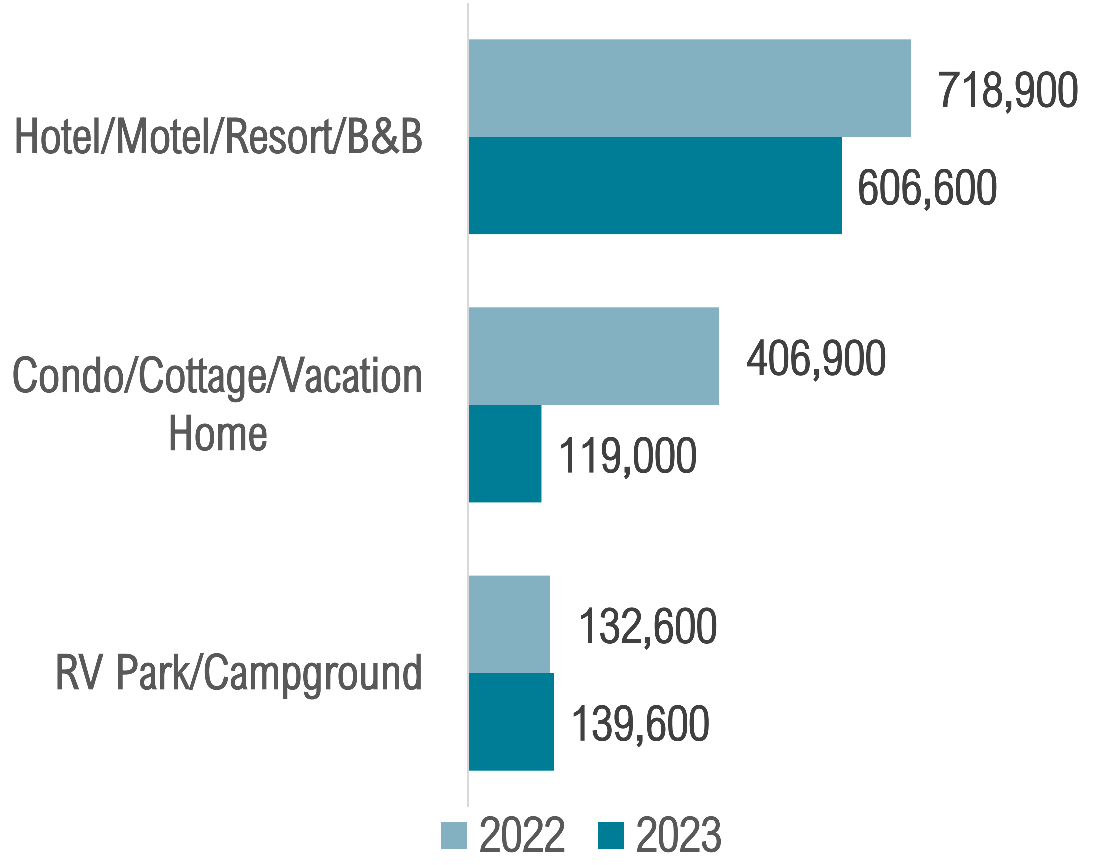
July - Sept visitors spent
865,200[1] nights in Fort Myers area hotels, resorts, condos, rental houses, RV parks, etc. (-31.6% from 2022).



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

ROOM NIGHTS GENERATED

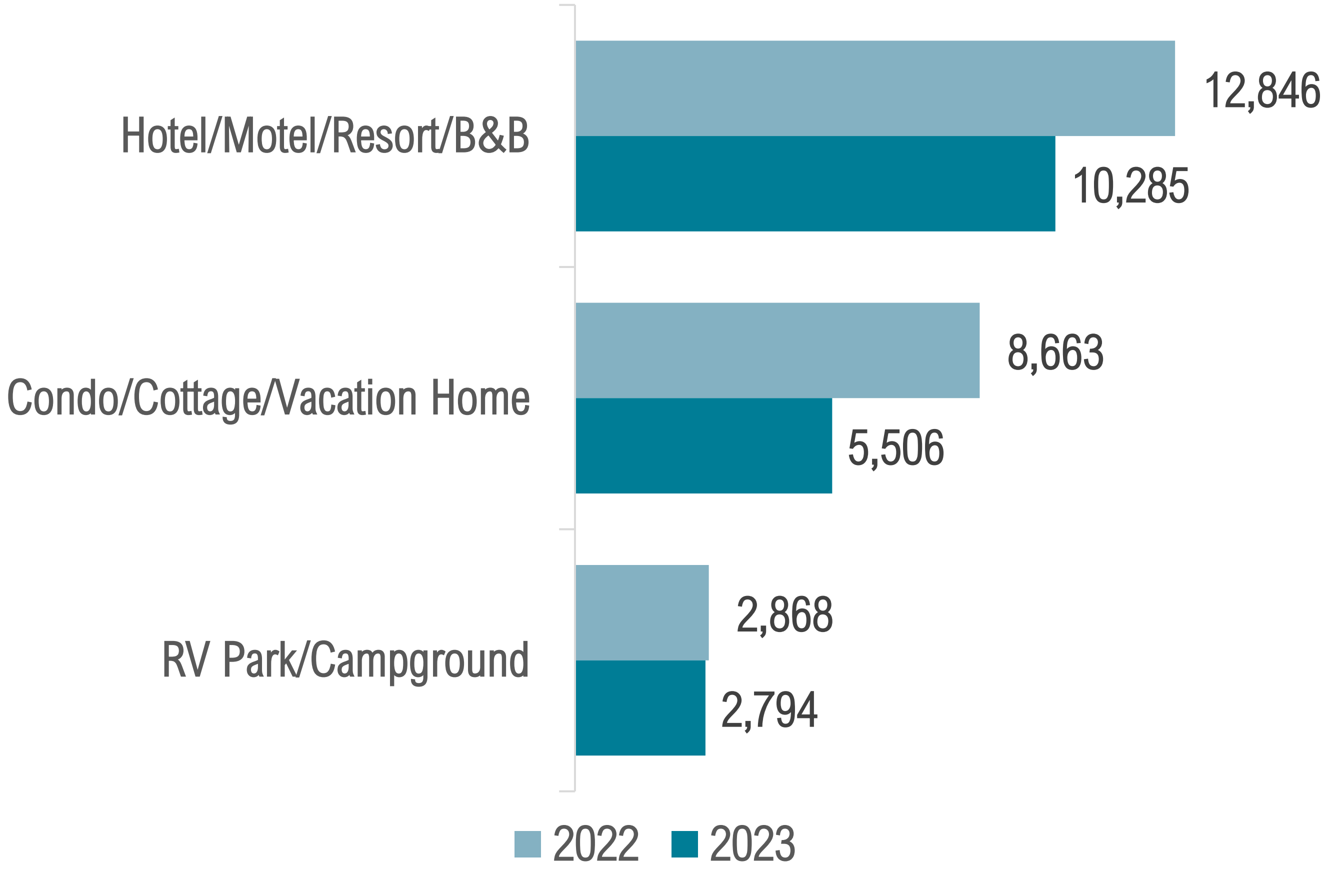
Hotels, motels, etc. accounted for 7 in 10 room nights spent in the Fort Myers area, while vacation rentals and RV parks/campgrounds accounted for the remaining 3 in 10 nights visitors spent in the area.



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

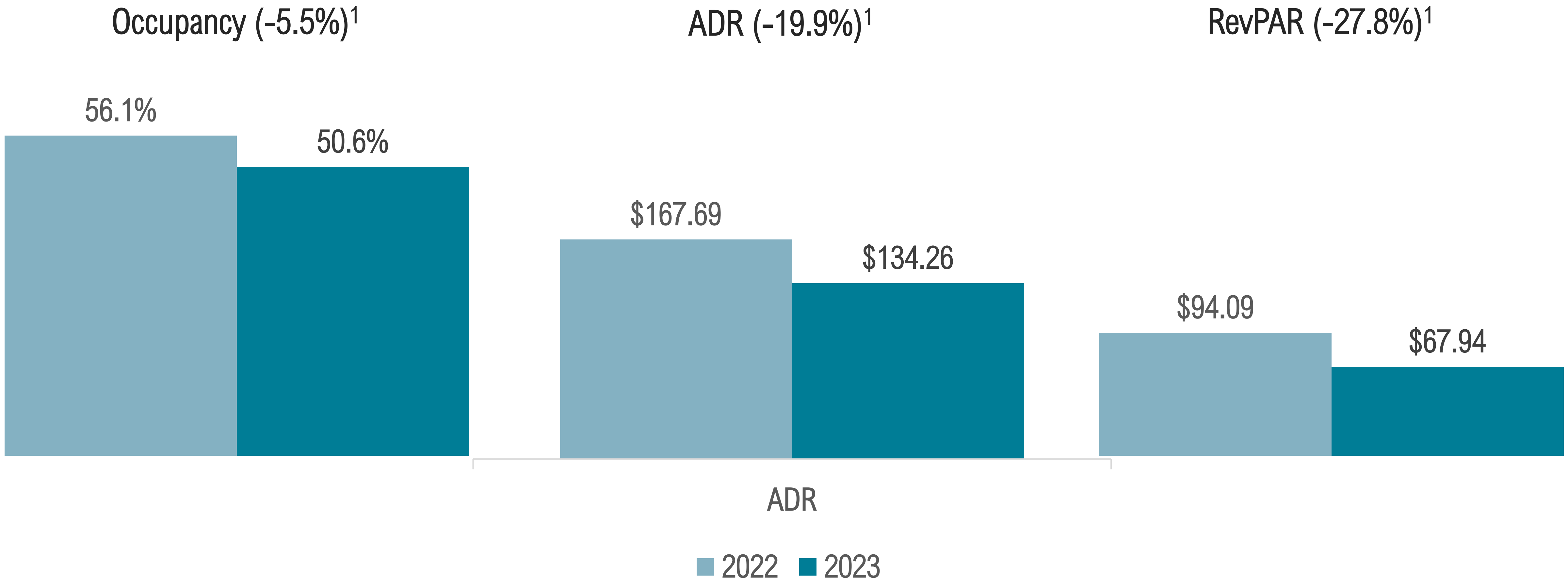
AVAILABLE UNITS

There were 18,585[1] available units in July - Sept 2023 vs. 24,376 in 2022 (-23.8%). Over half of the units available were from hotels, motels, etc.



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

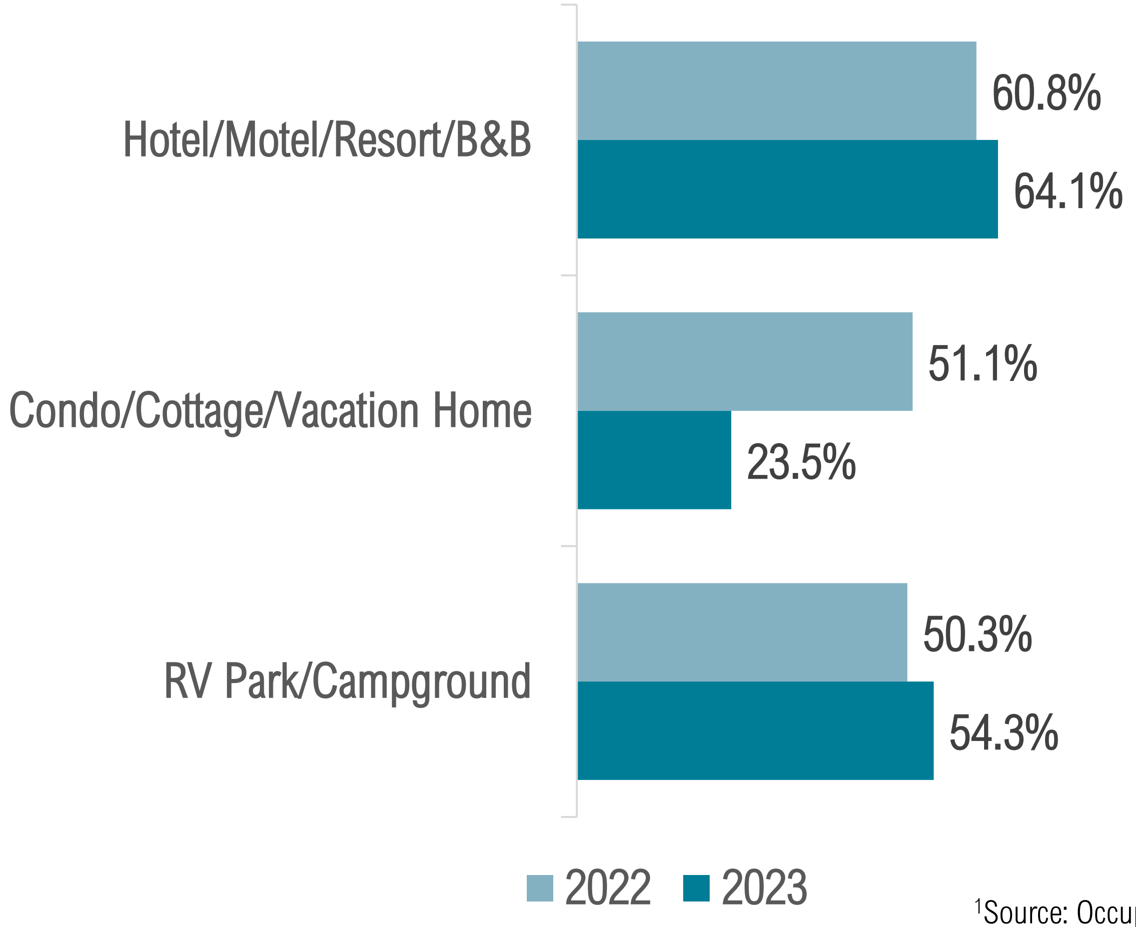
OCCUPANCY, ADR AND REVPAR



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

OCCUPANCY

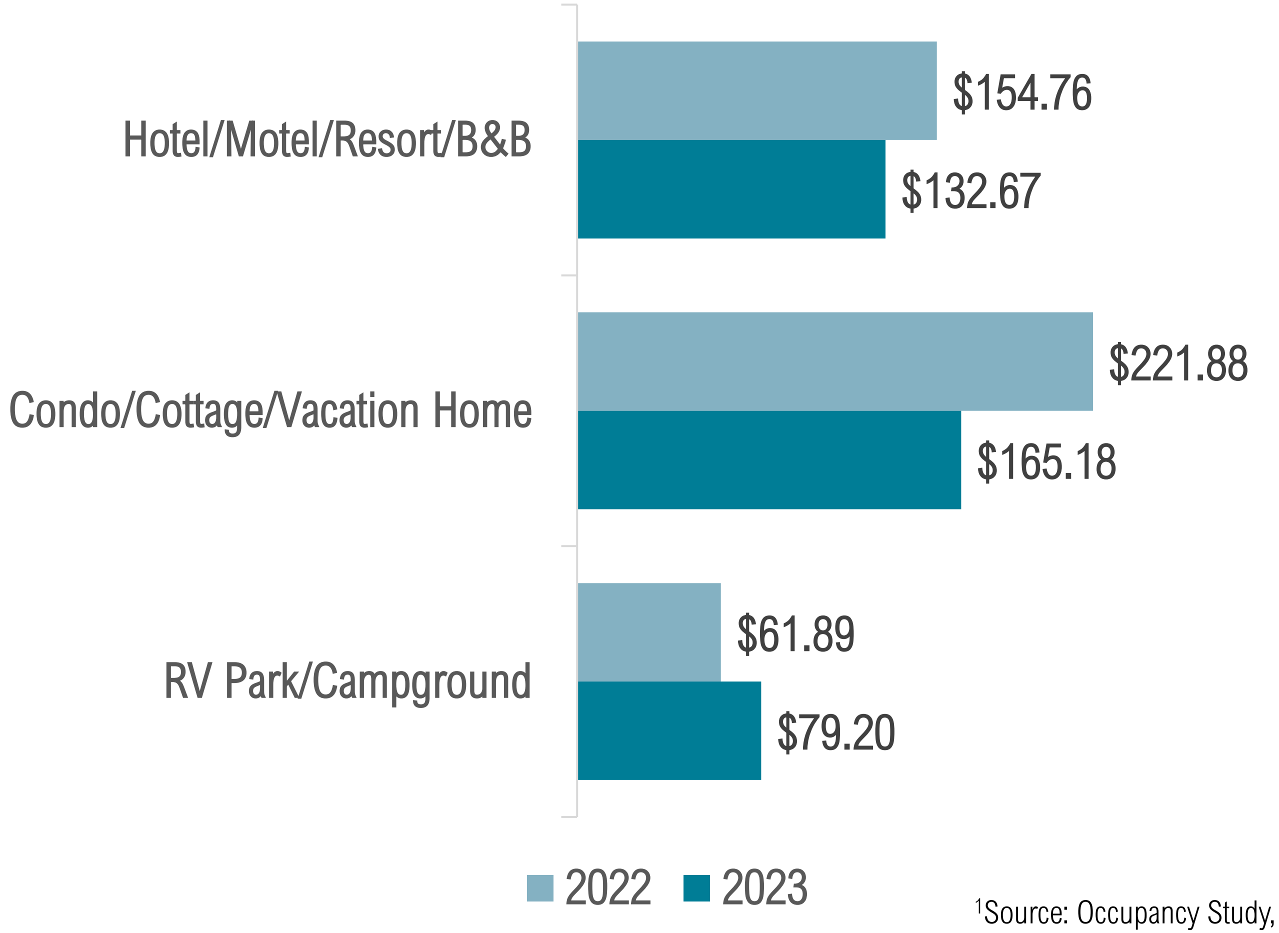
Average occupancy in July - Sept was 50.6%[1] (56.1% in 2022).



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

ADR

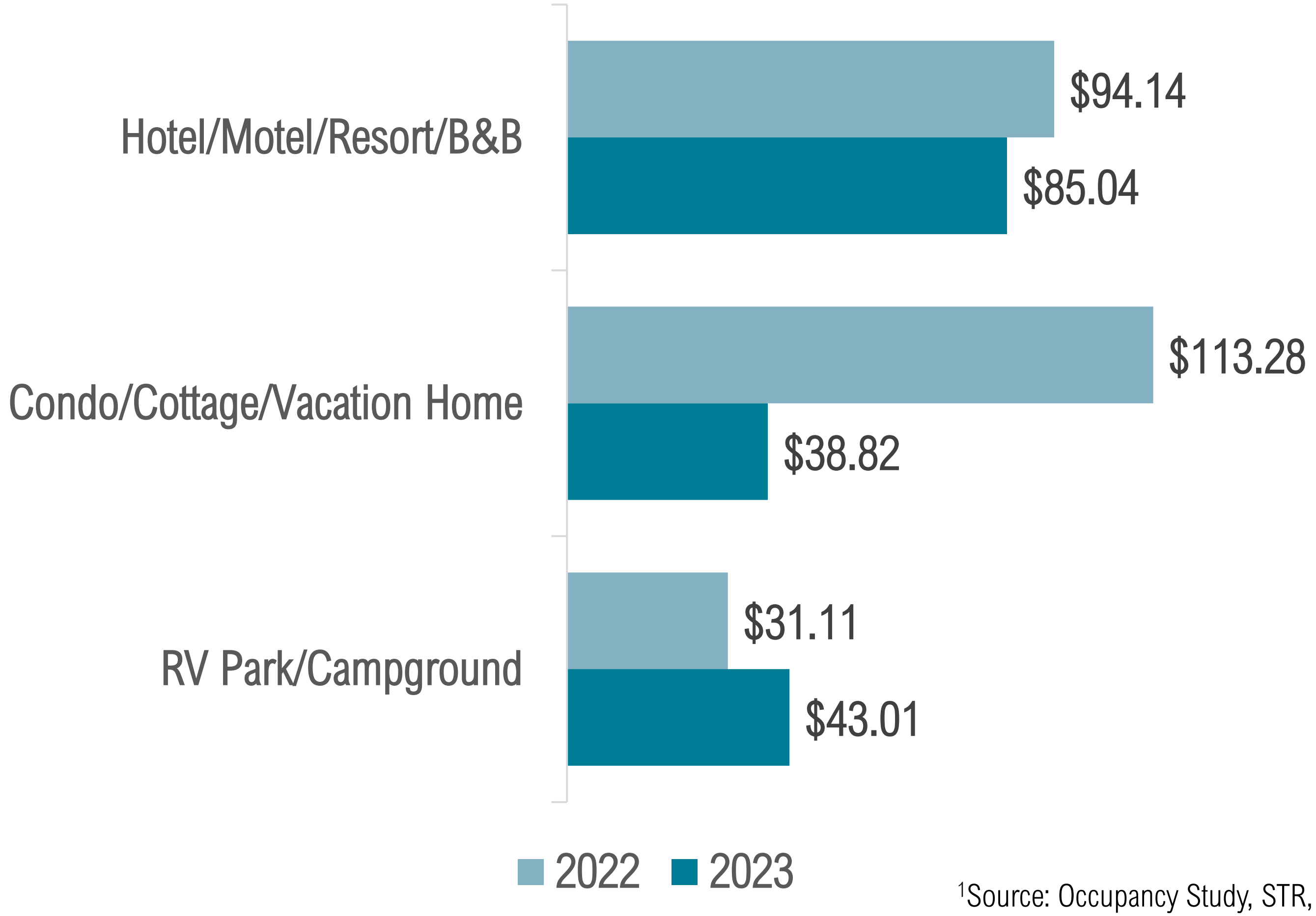
ADR in July – Sept was **$134.26**[1] ($167.69 in 2022).



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

REVPAR

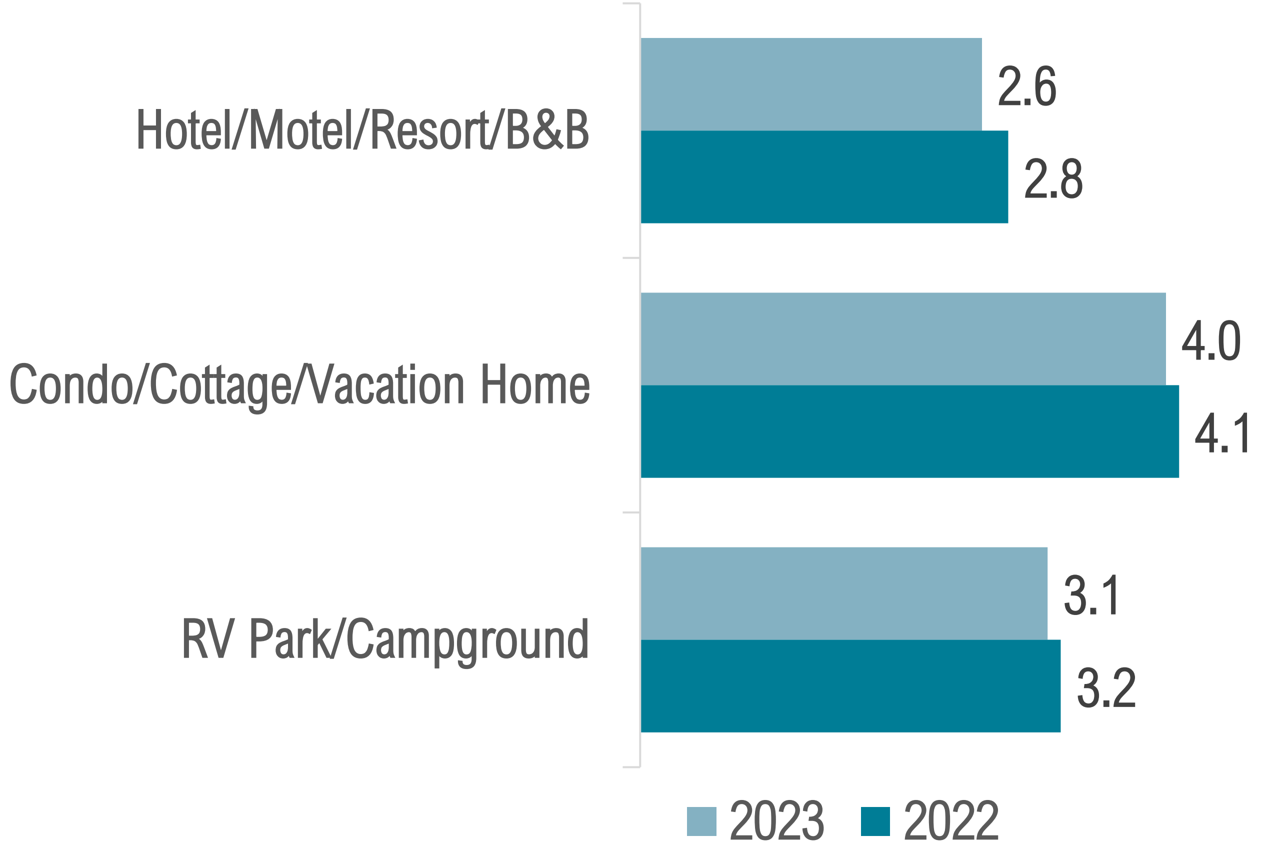
Average RevPAR in July - Sept was $67.94[1] ($94.09 in 2022).



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

TRAVEL PARTY SIZE

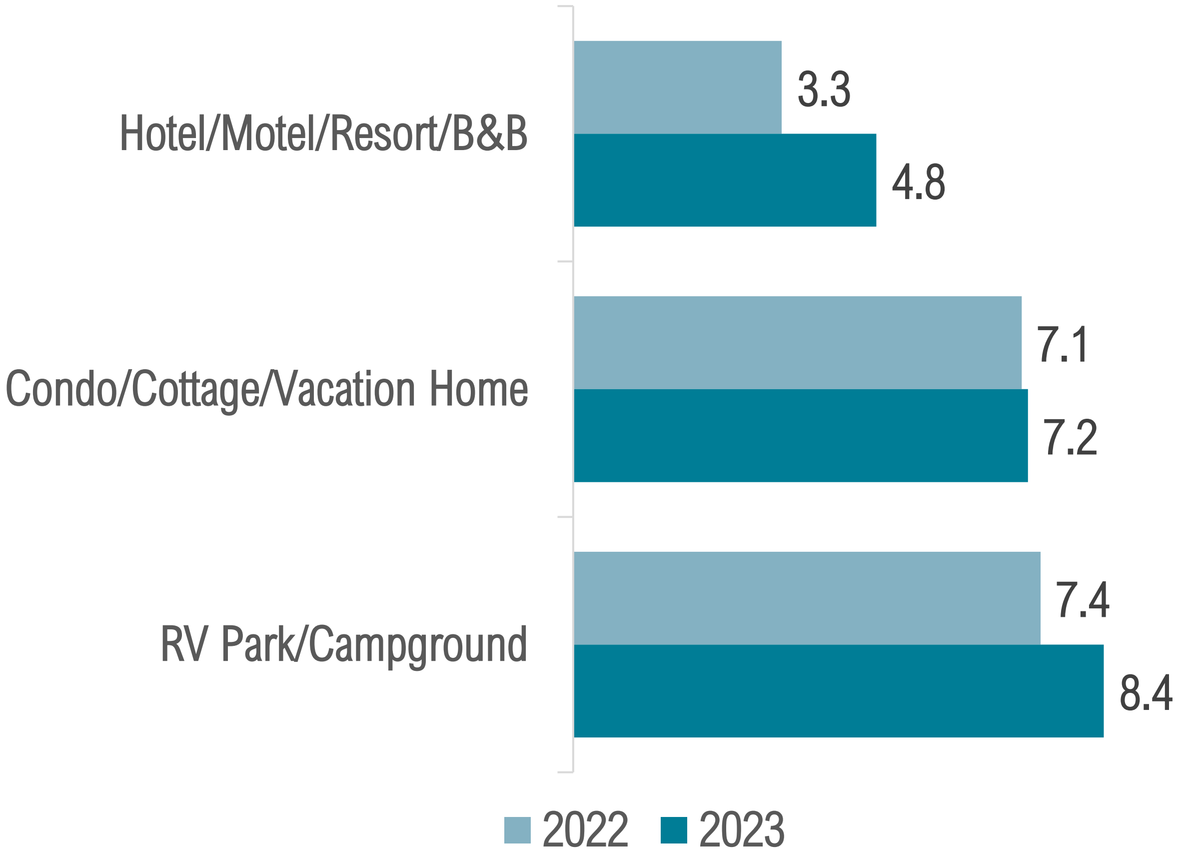
For visitors in paid accommodations, average travel party size in July - Sept was **3.0 people**[1] (3.1 people in 2022).



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

LENGTH OF STAY

For visitors in paid accommodations, average length of stay in July - Sept was **5.8 nights**[1] (5.0 nights in 2022).



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

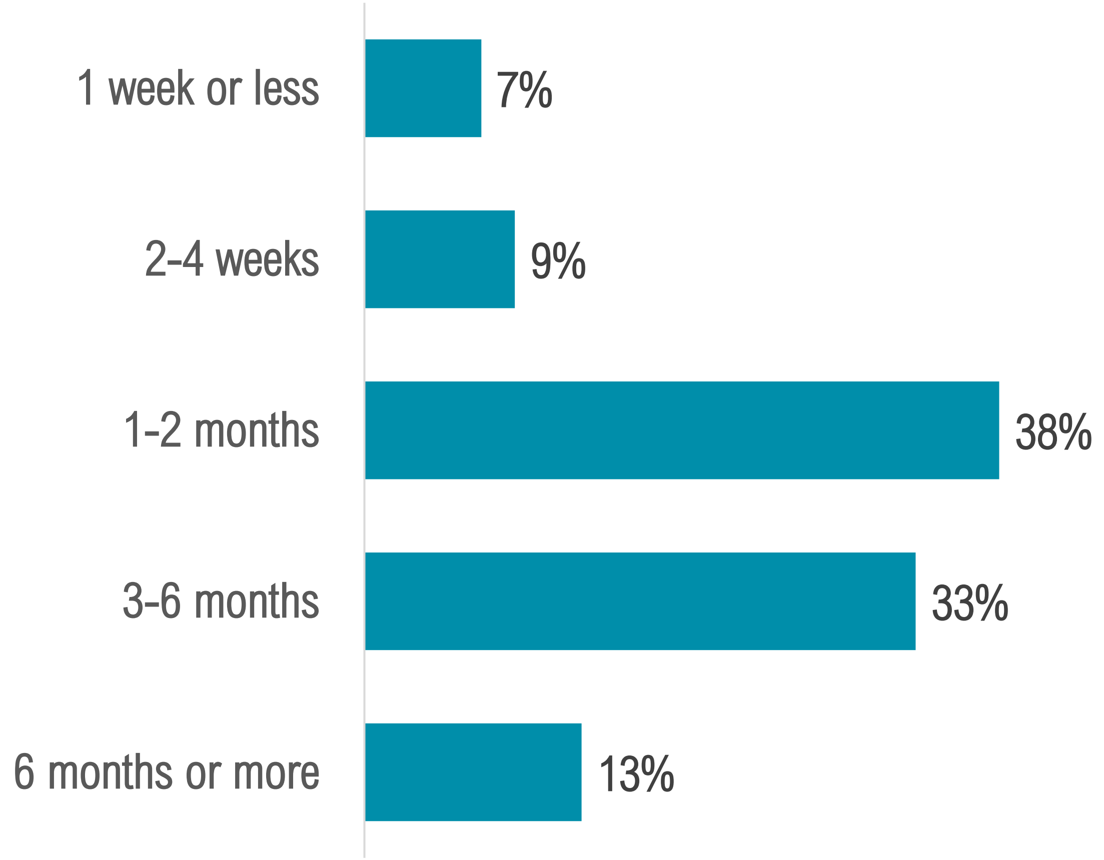
Visitor Journey: Pre-Visit

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

TRIP PLANNING CYCLE

Over 4 in 5 visitors planned their trip more than 1 month in advance, while nearly 2 in 5 visitors planned their trip 1-2 months in advance.

The average trip planning cycle lasted nearly 3 months (86 days).

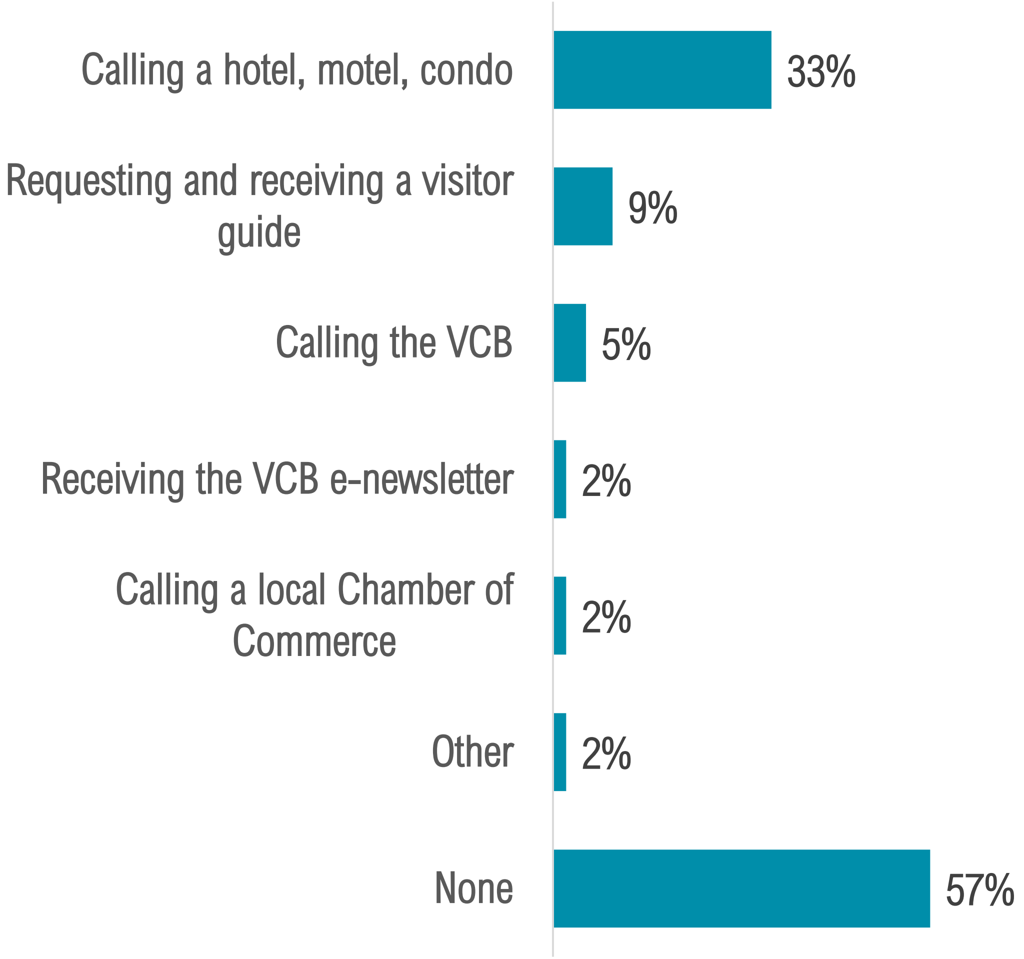


TRIP PLANNING: INFORMATION REQUESTS[1]

Over 2 in 5 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 Q3 2023 was lower than in Q3 2022.



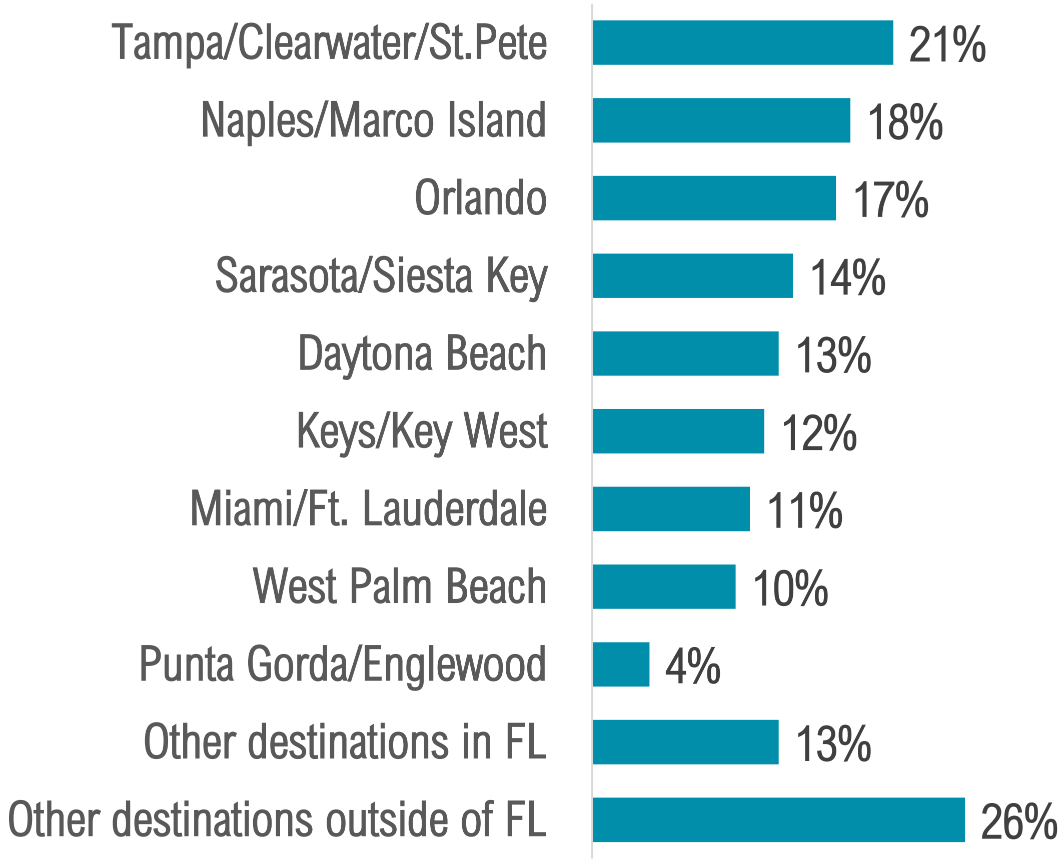
[1]Multiple responses permitted.

TRIP PLANNING: OTHER DESTINATIONS CONSIDERED[1]

Most alternate destinations considered were in Florida.

Over 1 in 4 visitors considered destinations outside of Florida.

BASE: 43% of visitors who considered other destinations



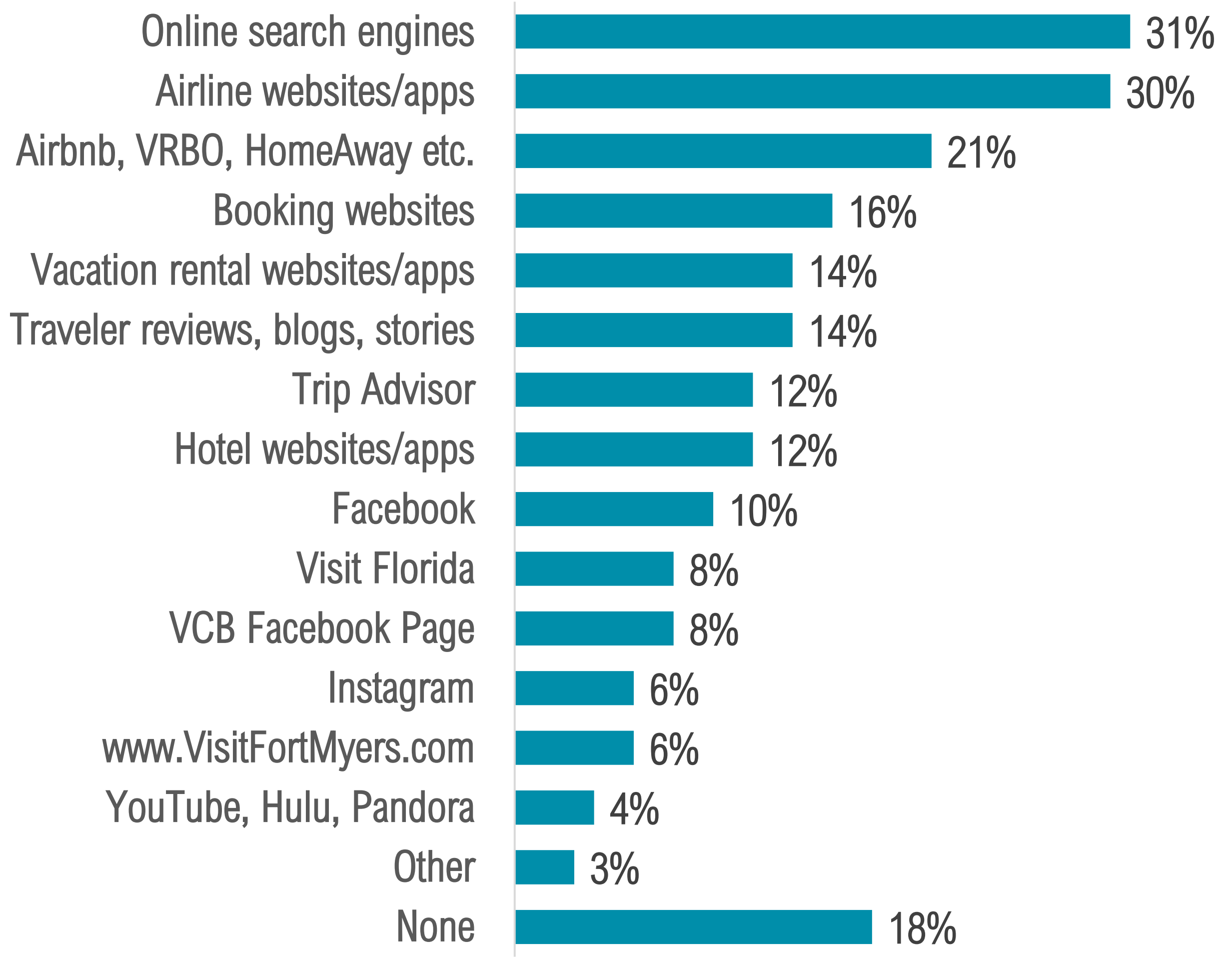
[1]Multiple responses permitted.

TRIP PLANNING: WEBSITES/APPS USED[1]

Over 4 in 5 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.

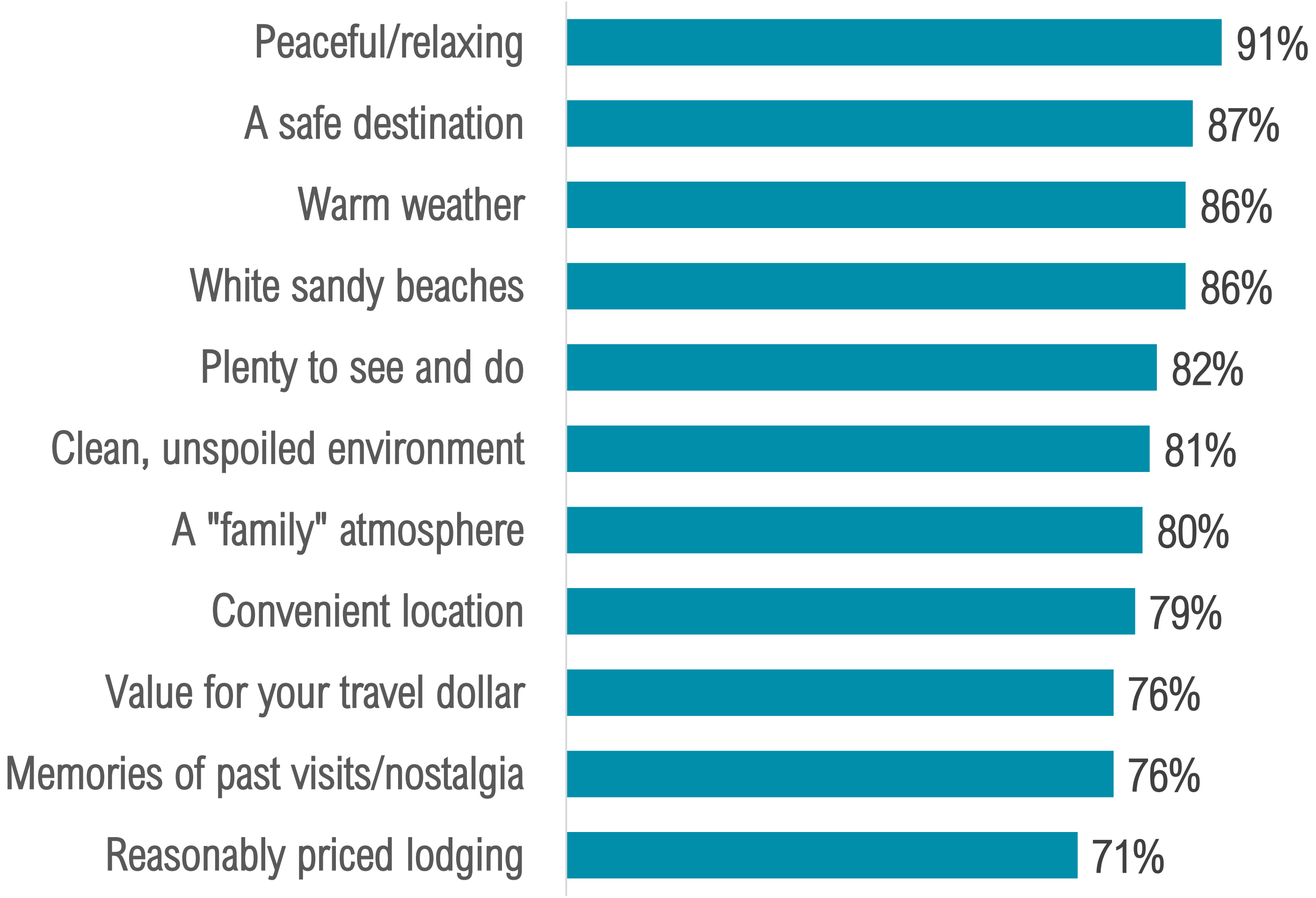
Over 1 in 5 visitors used Airbnb, VRBO, HomeAway, or similar websites to plan their trips.



[1]Multiple responses permitted.

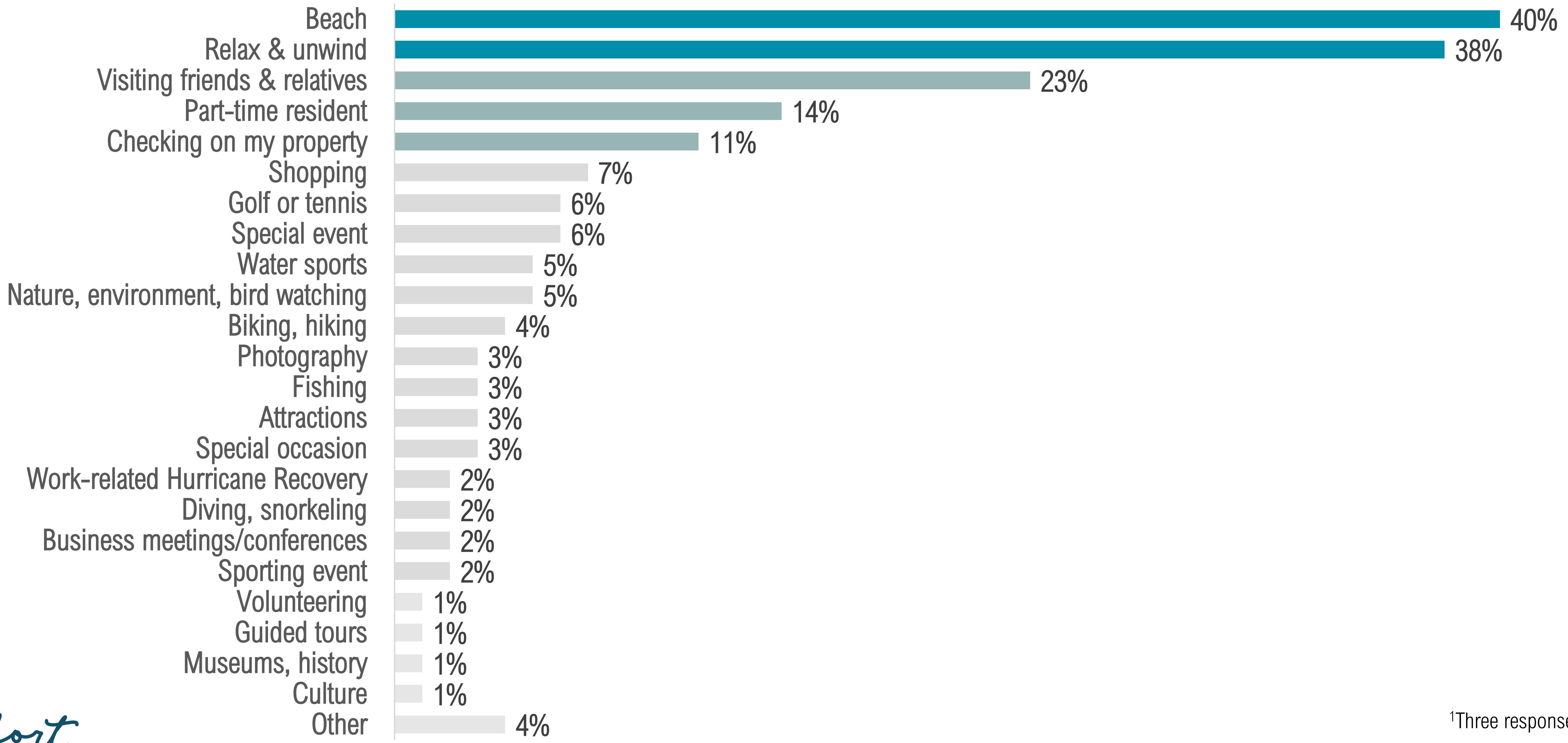
TRIP INFLUENCES[1]

Visitors were heavily influenced by the **peacefulness, safety, warm weather,** and **white sandy beaches** in the Fort Myers area 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.

REASON FOR VISITING[1]



[1]Three responses permitted.

Pre-Visit
Jul - Sep 2023

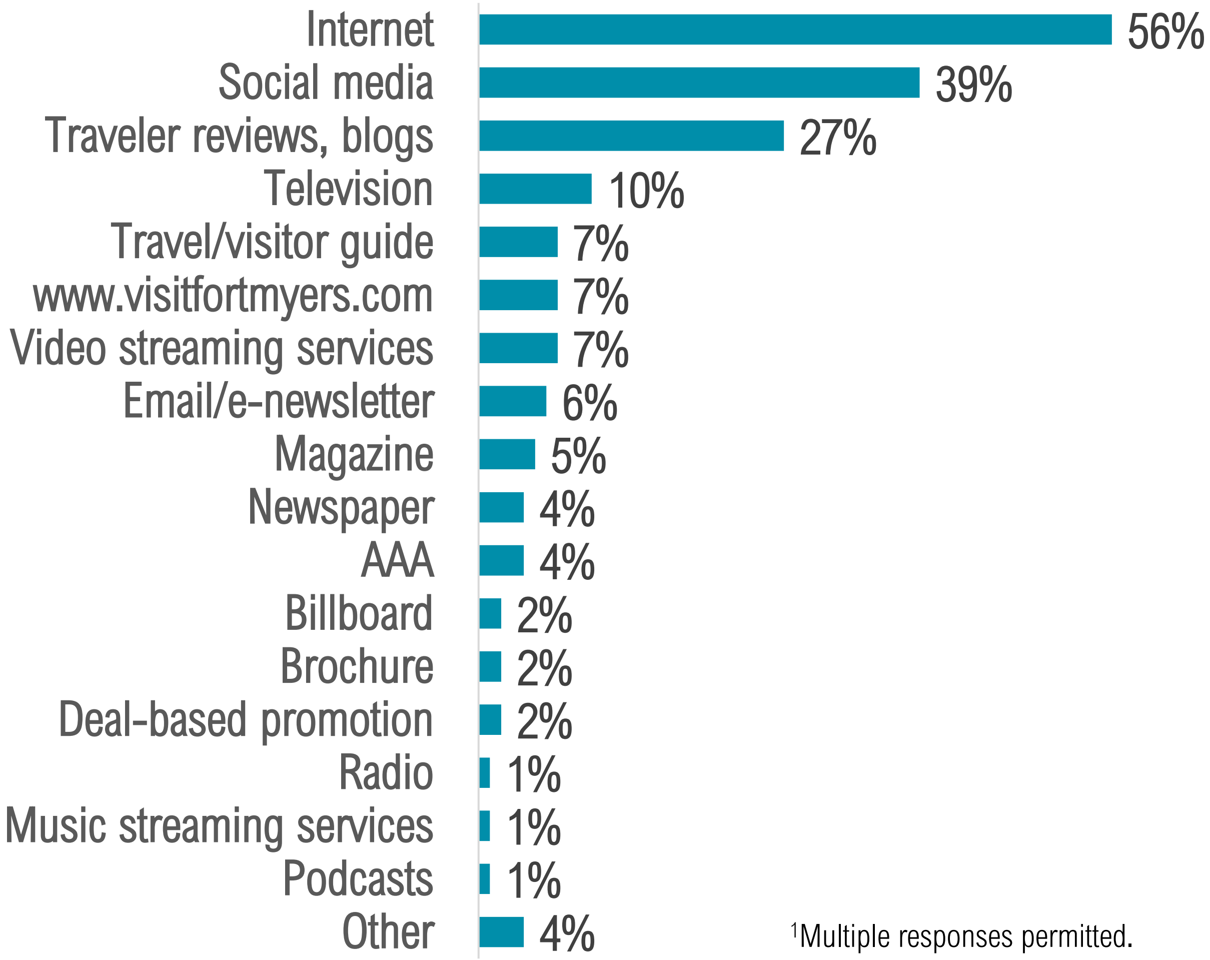
PROMOTIONS RECALL[1]

43% of visitors **recalled promotions** in the past 6 months for the Fort Myers area.

This influenced **21%** of all visitors to come to the Fort Myers area.

BASE: 43% of visitors who recalled promotions

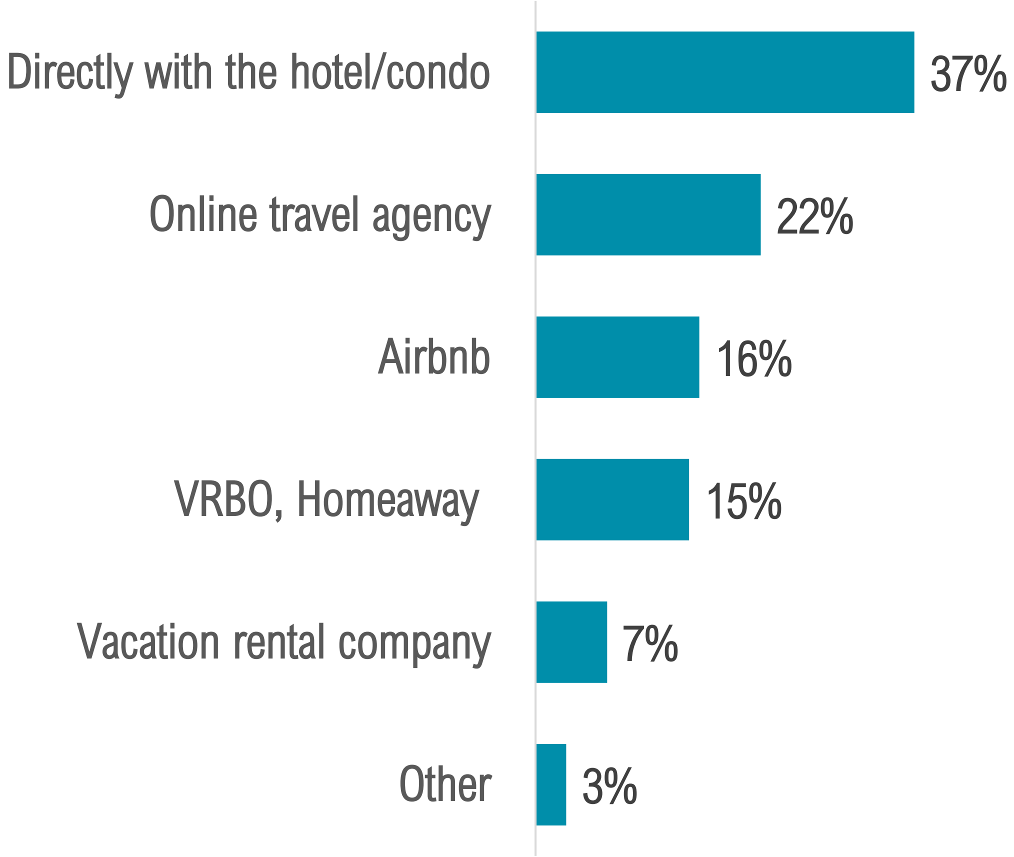
Source of Promotion



[1]Multiple responses permitted.

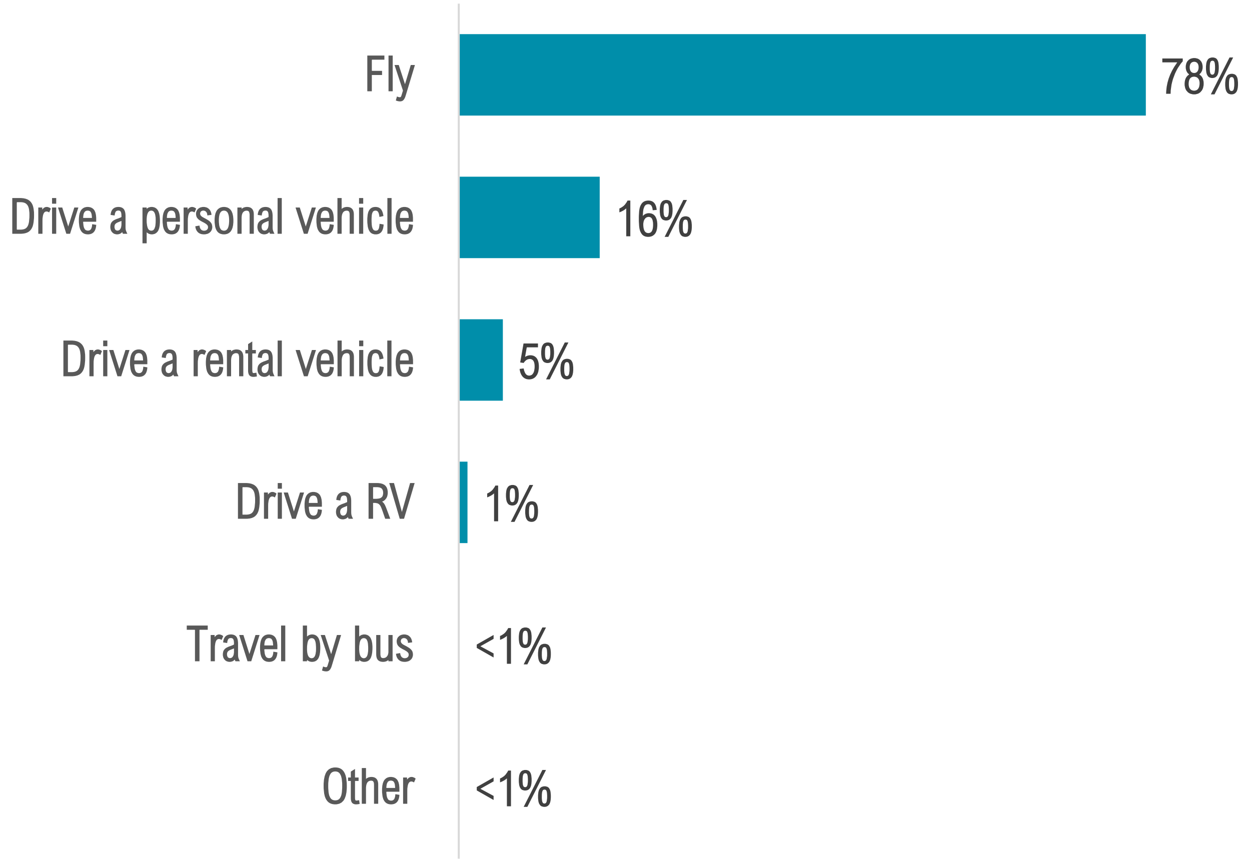
BOOKING

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



TRANSPORTATION

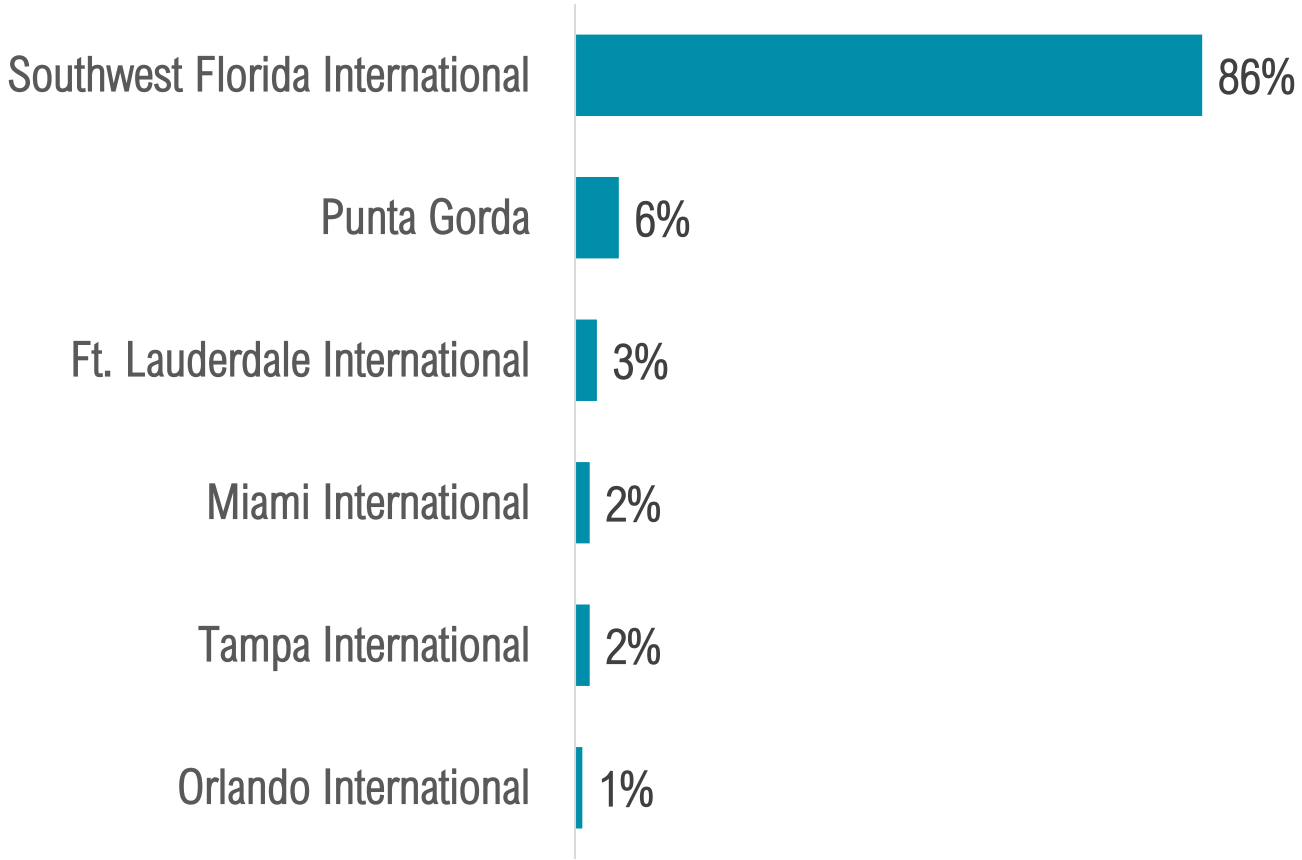
Nearly 4 in 5 visitors flew to the Fort Myers area.



AIRPORT

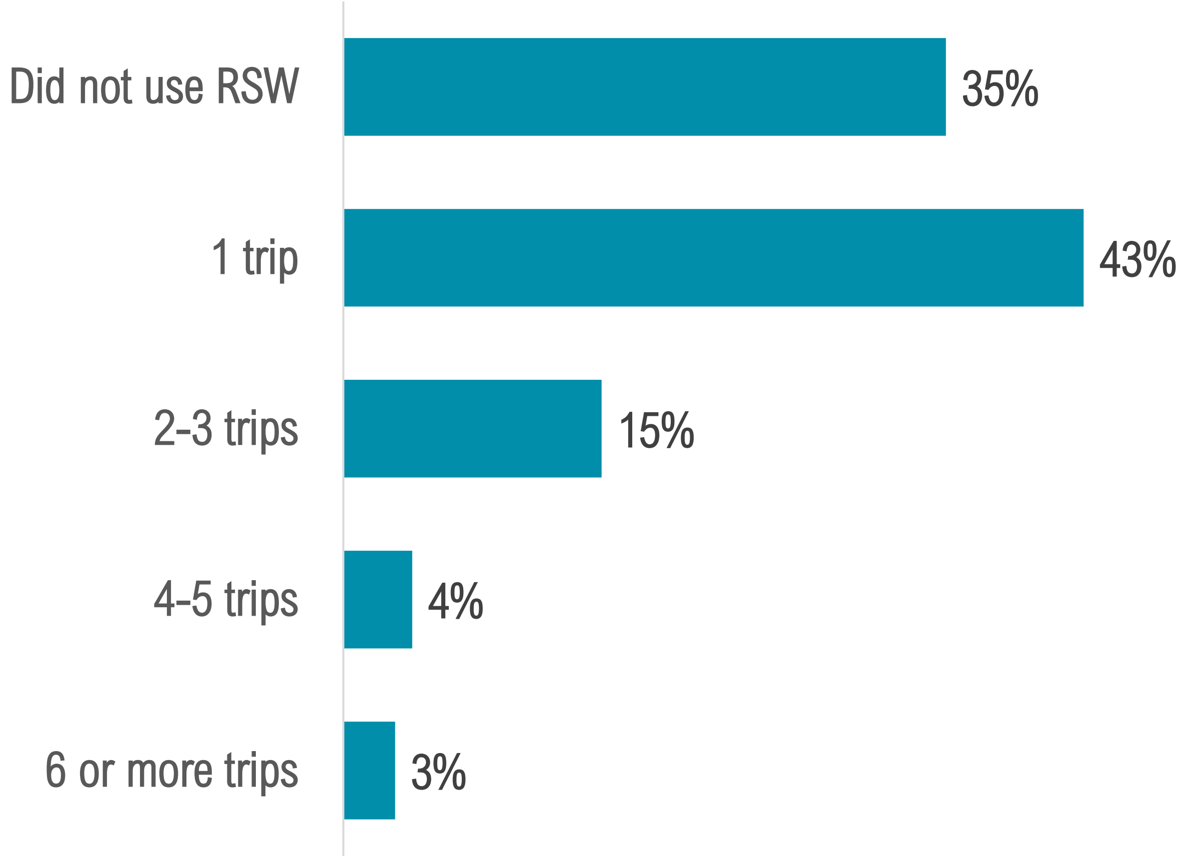
Over 4 in 5 visitors who flew to the Fort Myers area came through RSW.

BASE: 78% of visitors who flew



USE OF RSW IN THE PAST YEAR

65% of visitors used RSW at least once in the past year.



VISITOR JOURNEY: TRAVEL PARTY PROFILE

Pre-Visit

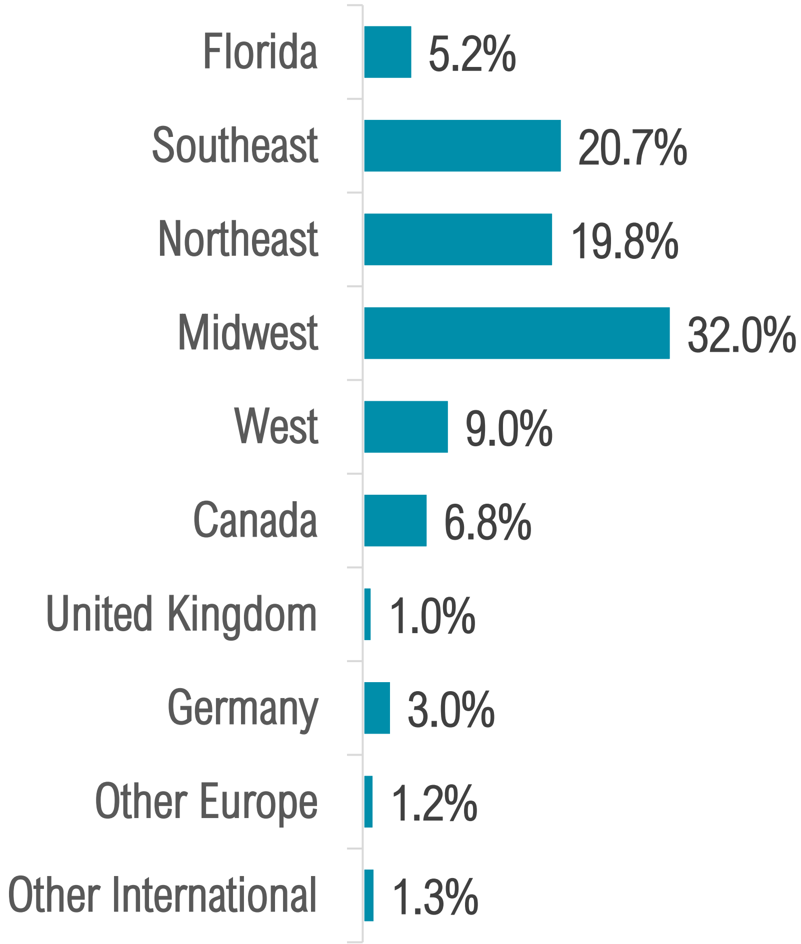
Travel Party Profile

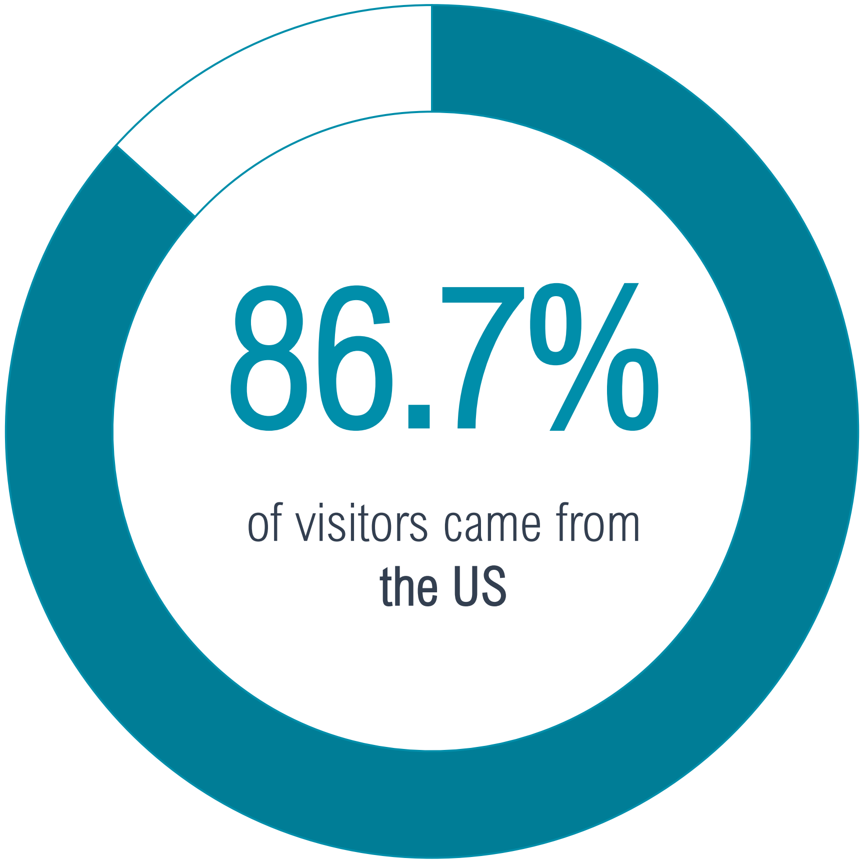
Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

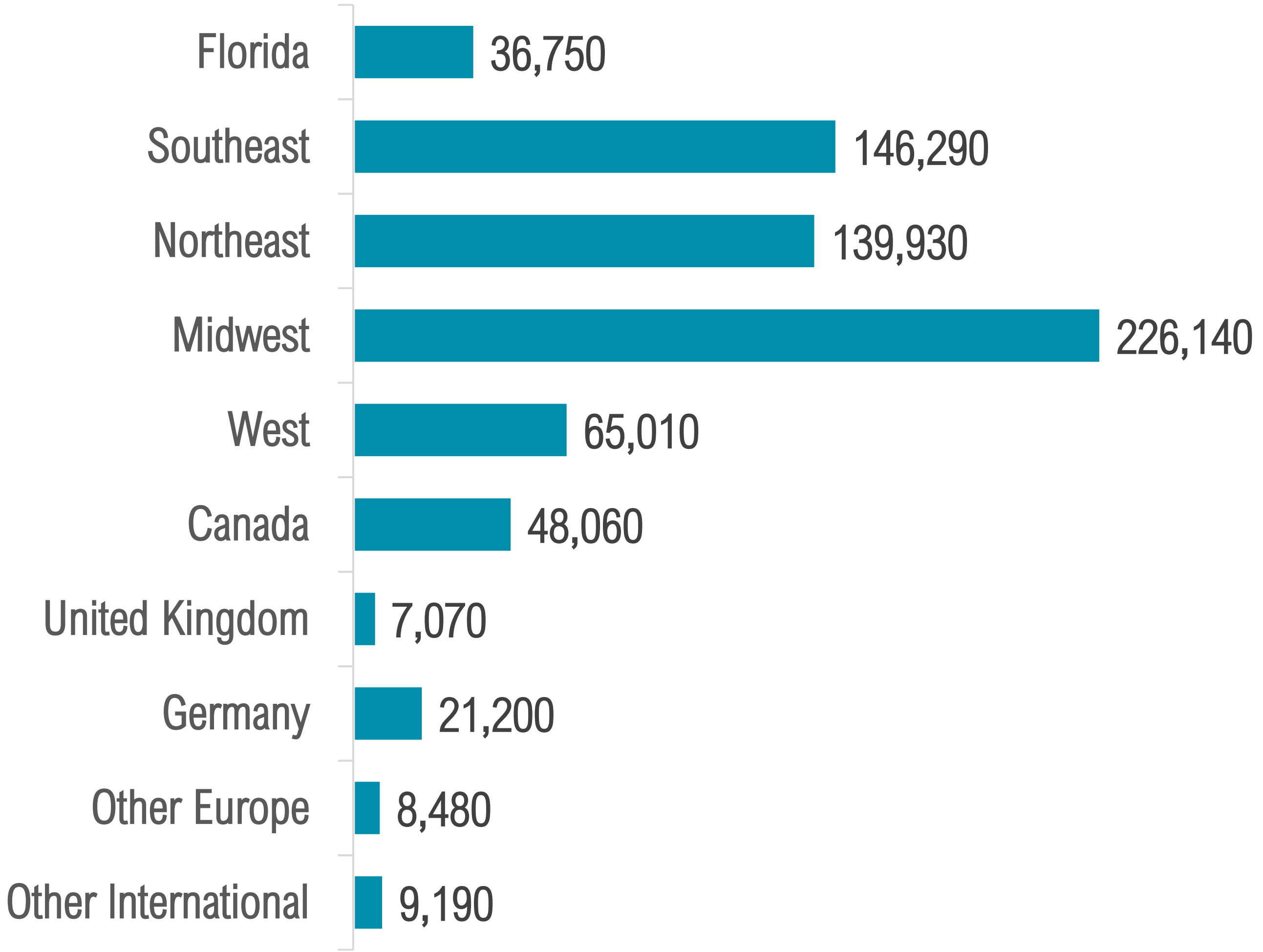
ORIGIN[1]





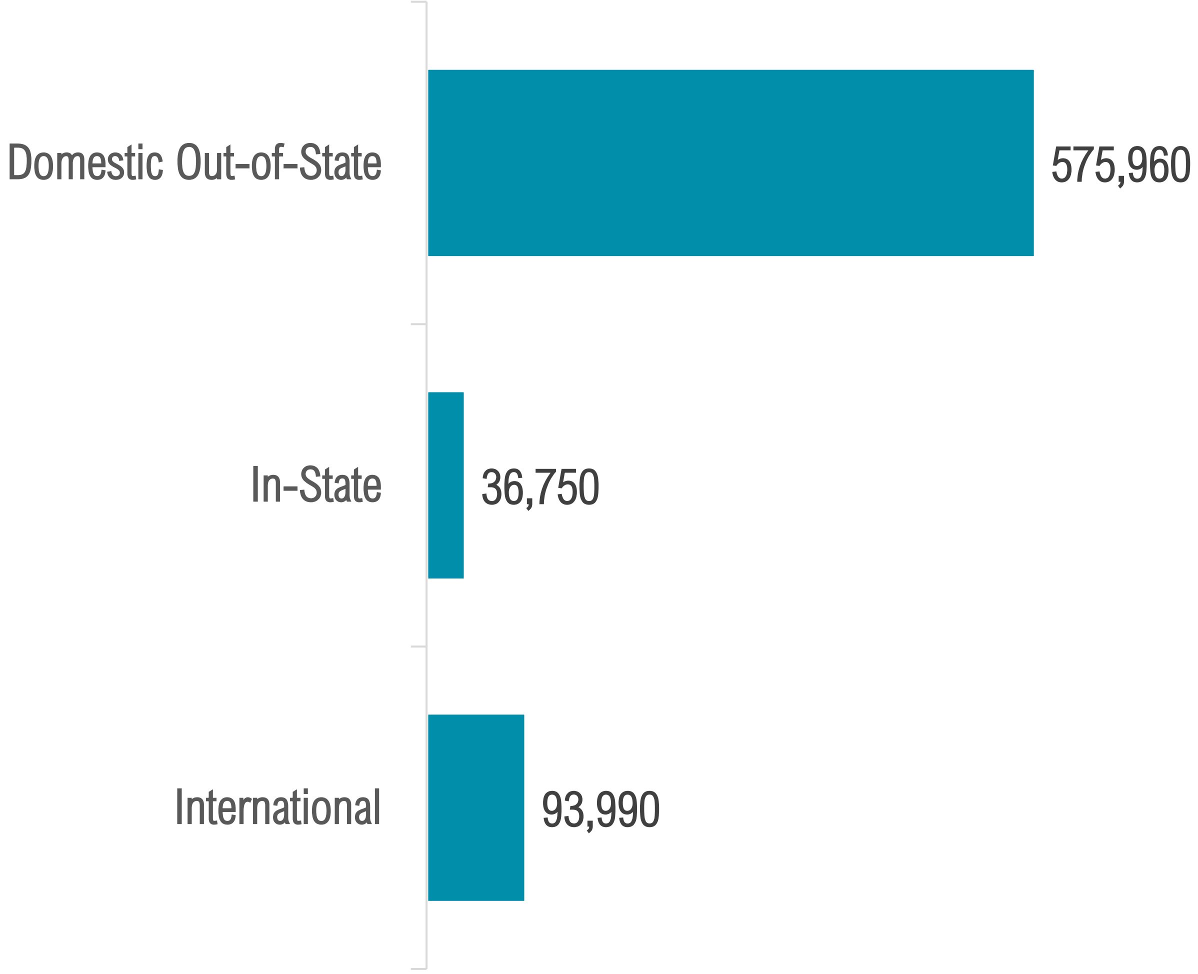
[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers. Based on data from the Visitor Tracking Study.

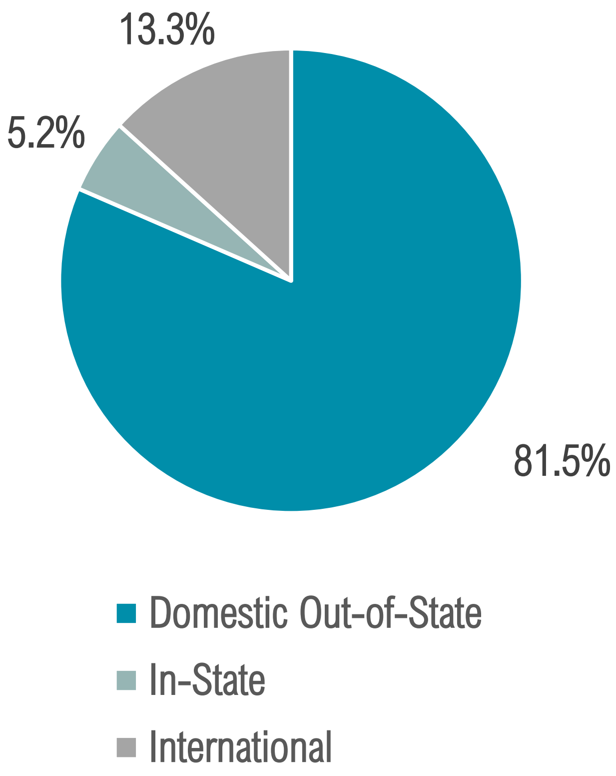
NUMBER OF VISITORS BY ORIGIN[1]



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

NUMBER OF VISITORS BY ORIGIN

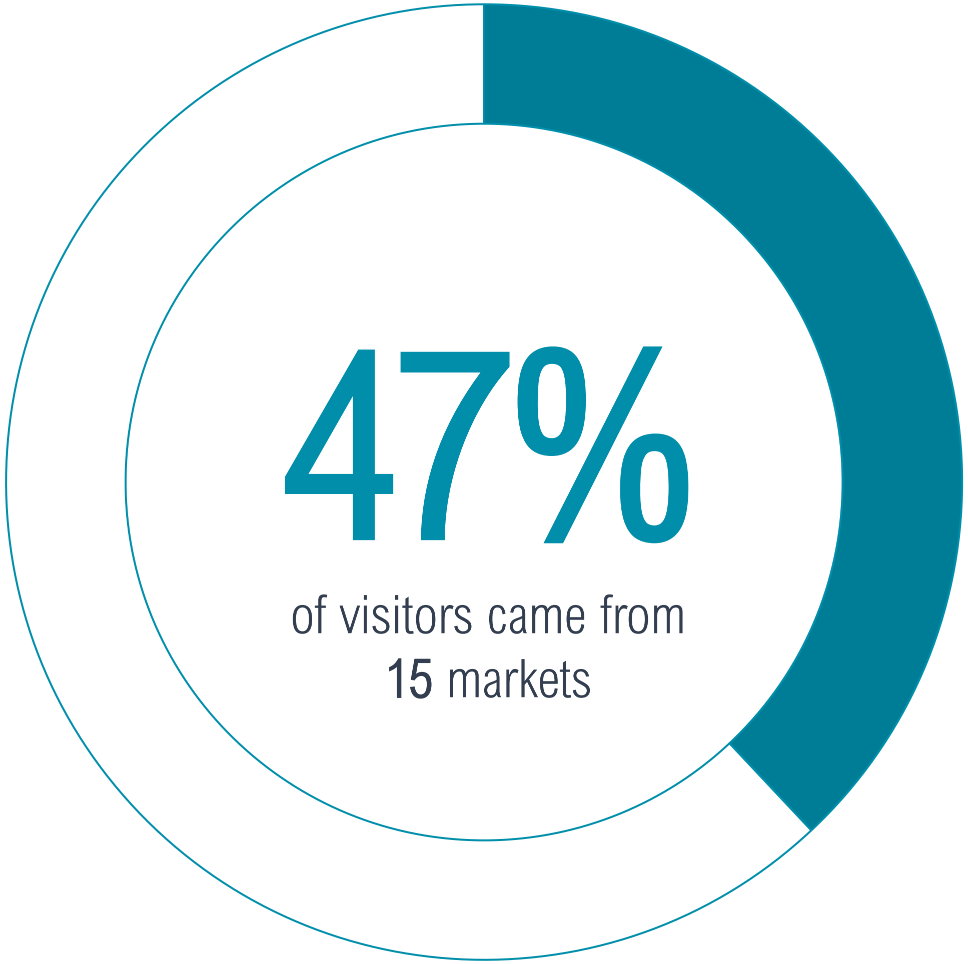




[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers. Based on data from the Visitor Tracking Study.

ORIGIN MARKETS[1]

Market [2]	Percentage of Visitors
NEW YORK	9%
CHICAGO	5%
CLEVELAND - AKRON	5%
ATLANTA	4%
CINCINNATI	3%
WASHINGTON, DC - HAGERSTOWN	3%
DENVER	2%
DES MOINES - AMES	2%
DETROIT	2%
HARTFORD - NEW HAVEN	2%
HOUSTON	2%
INDIANAPOLIS	2%
LOUISVILLE	2%
NASHVILLE	2%
PITTSBURGH	2%



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

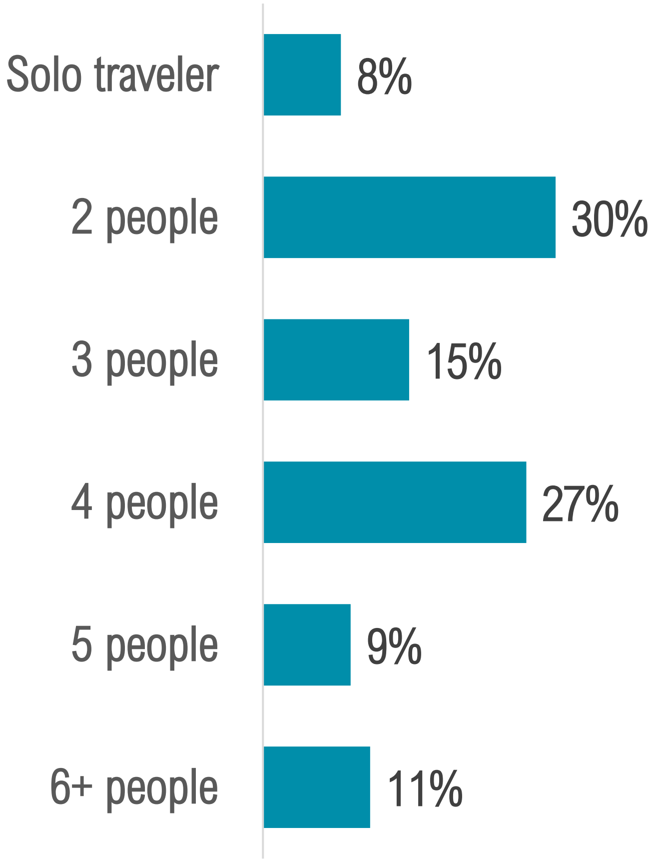
TRAVEL PARTY SIZE AND COMPOSITION

Travel Party Size

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

Travel with Children

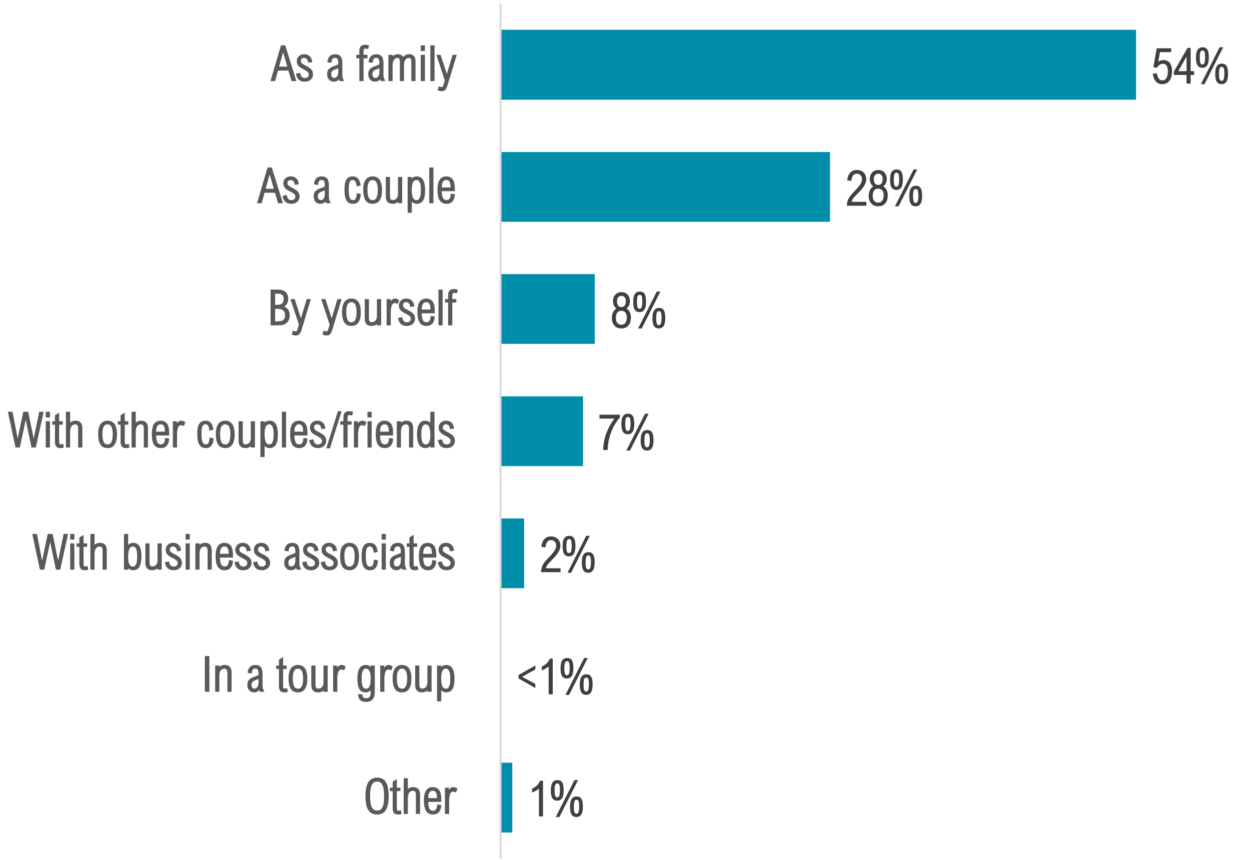
44% of visitors **traveled with children** under the age of 18.



[1]Sources: Occupancy Study and Visitor Tracking Study

TRAVEL PARTY TYPE

Over **half** of visitors traveled as a **family,** while **over 1 in 4** traveled as a **couple**, and roughly **1 in 13** visitors traveled **with other couples/friends** or **by themself**.



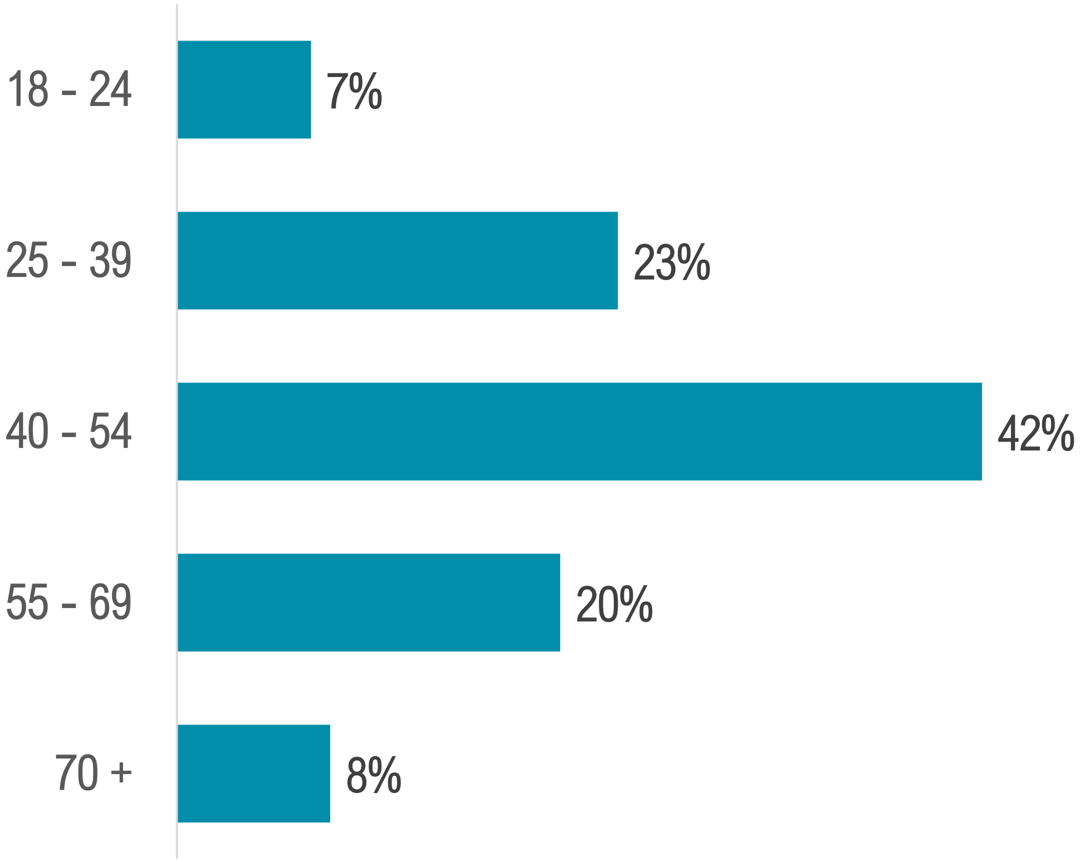
AGE

Average Age

The average age of July - Sept visitors was **50 years old.**

Median Age

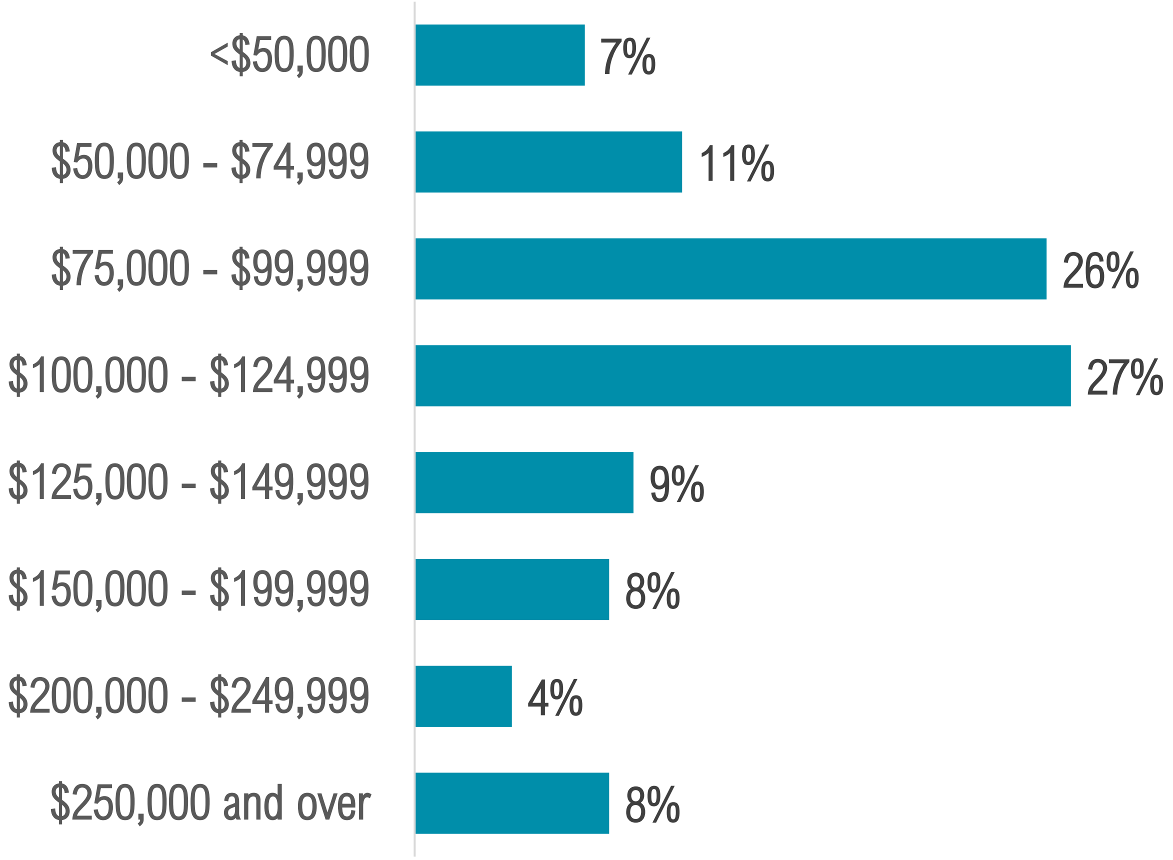
The median age of July - Sept visitors was **47 years old.**



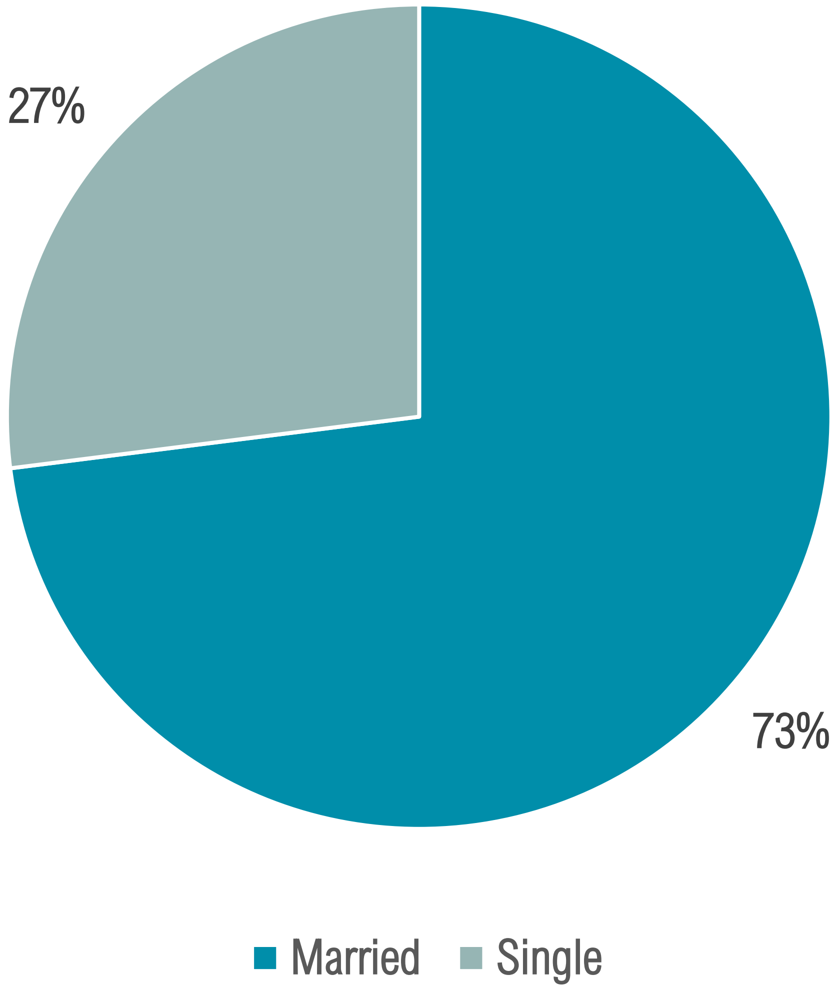
HOUSEHOLD INCOME

Median Household Income
July - Sept visitors had a median household income of **$105,600.**

12% of visitors had a household income in excess of **$200,000.**



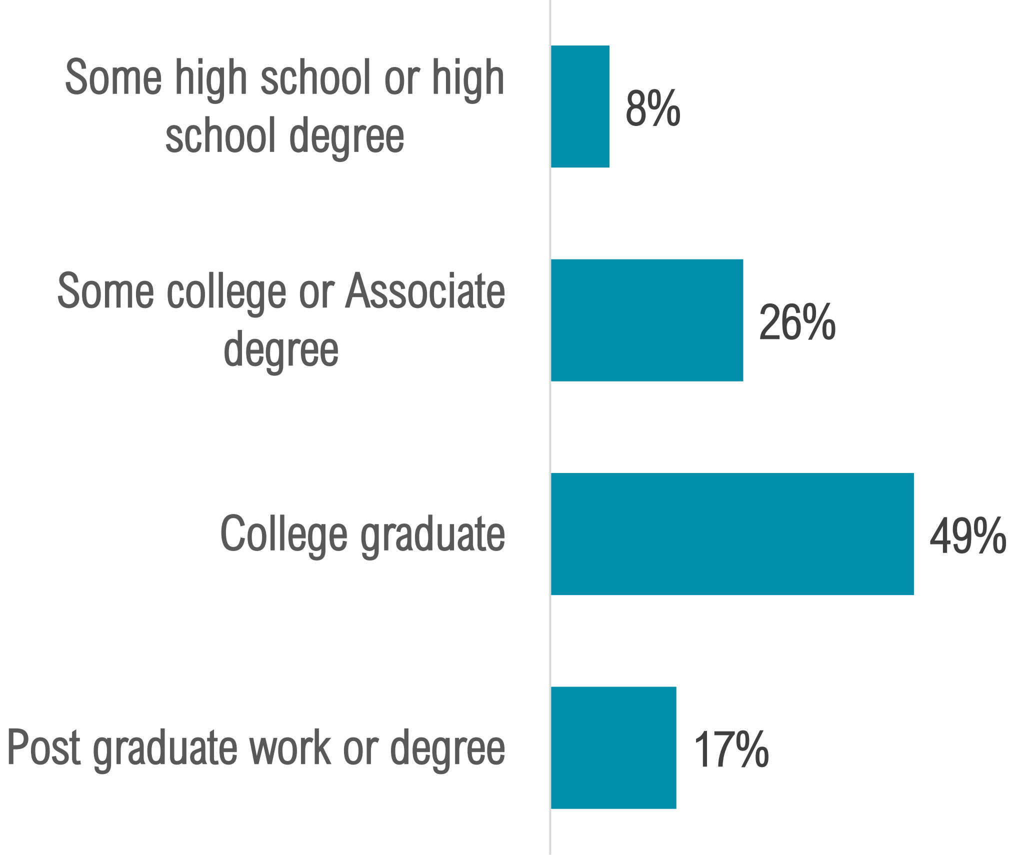
MARITAL STATUS



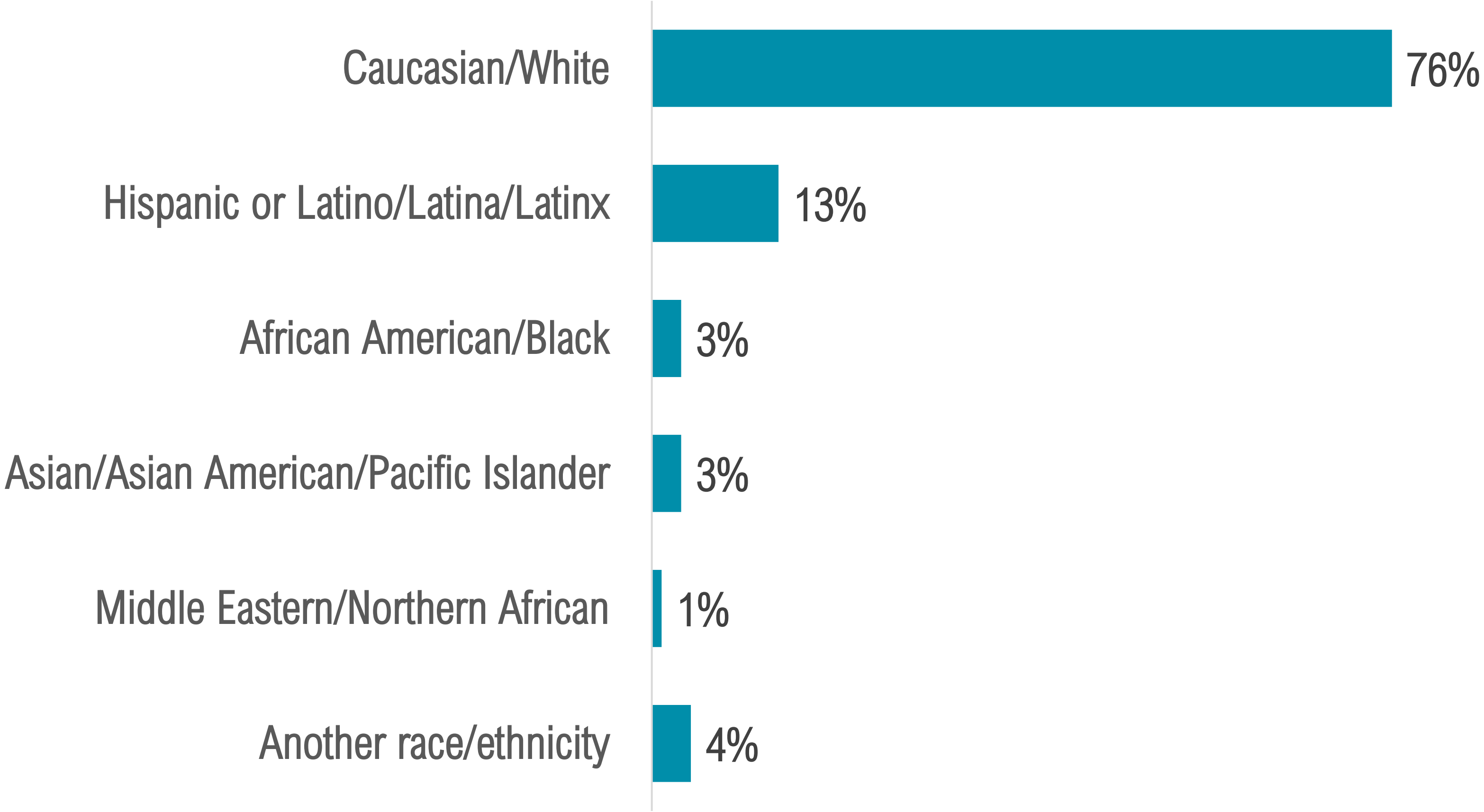
EDUCATION

Education Level

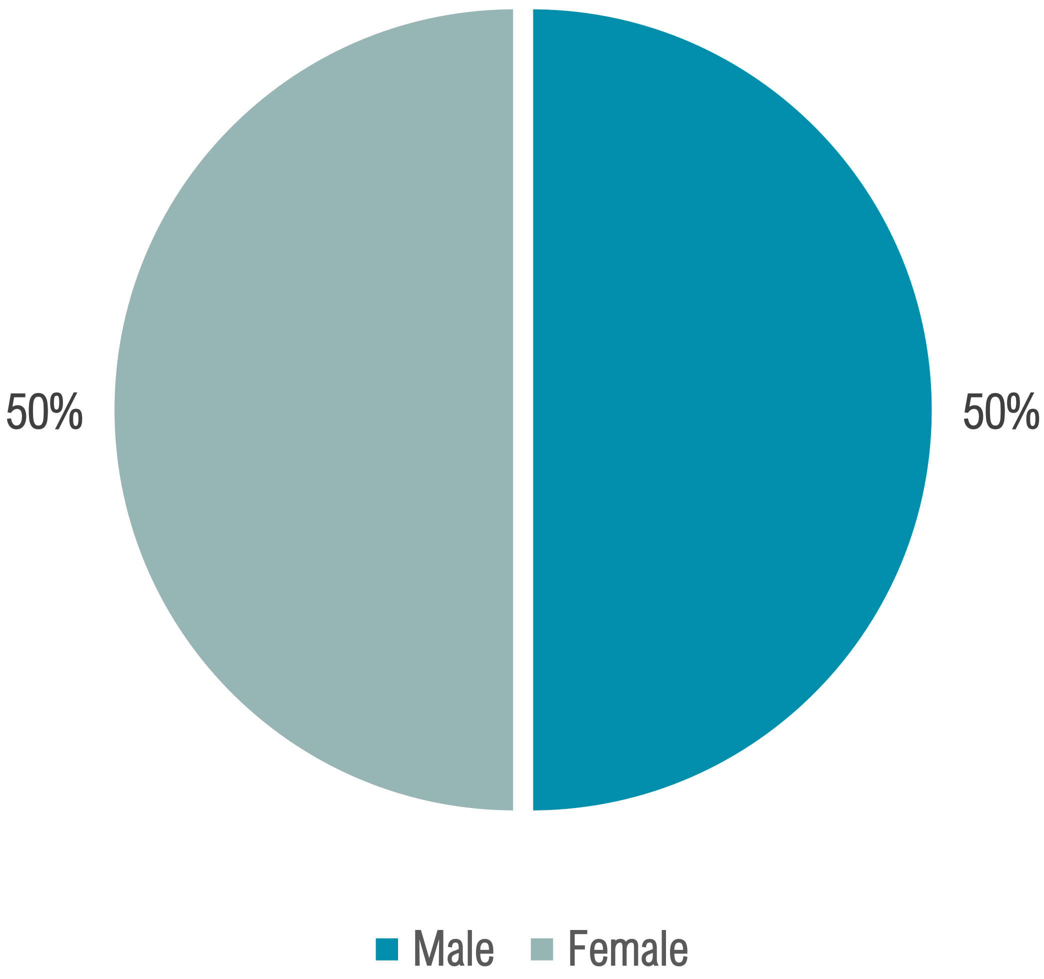
2 in 3 of July - Sept visitors have achieved a bachelor's degree or higher.



RACE/ETHNICITY



GENDER[1]



[1]Gender of person interviewed.

VISITOR JOURNEY: TRIP EXPERIENCE

Pre-Visit

Travel Party Profile

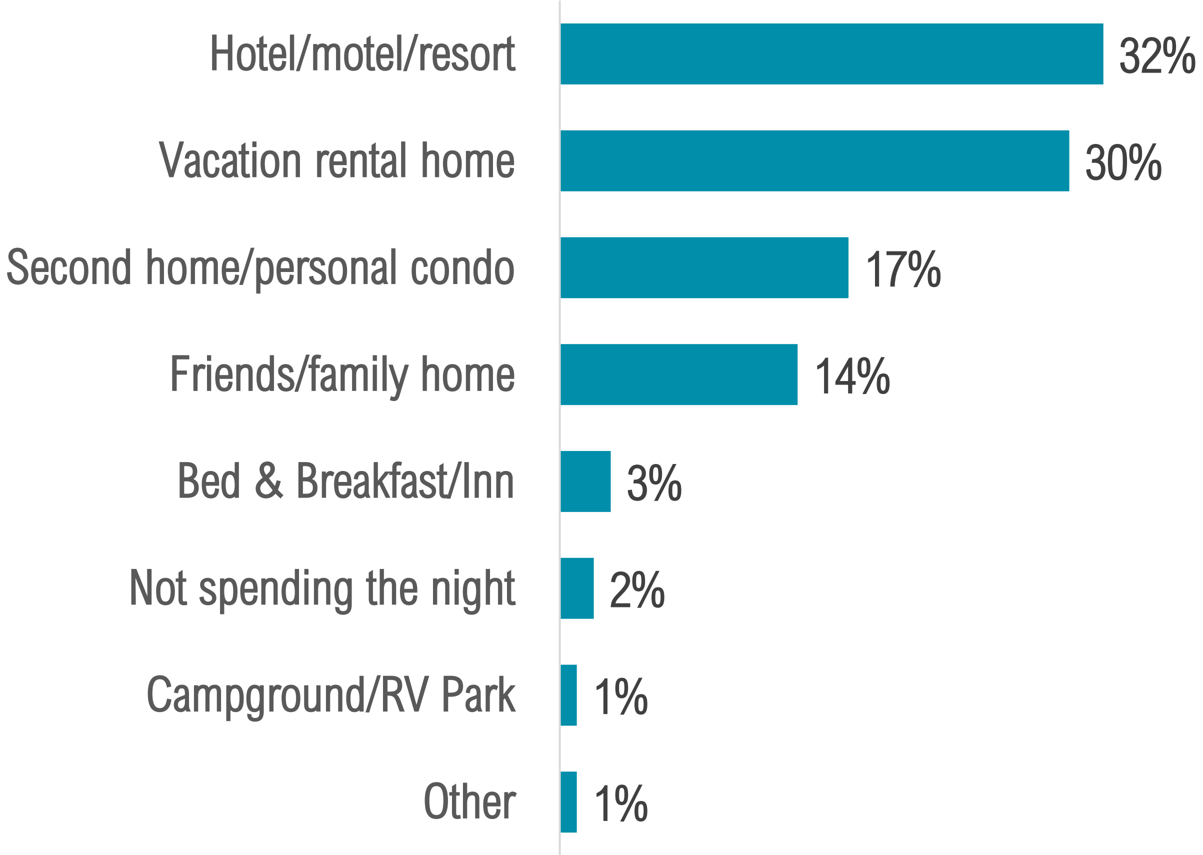
Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

ACCOMMODATIONS

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



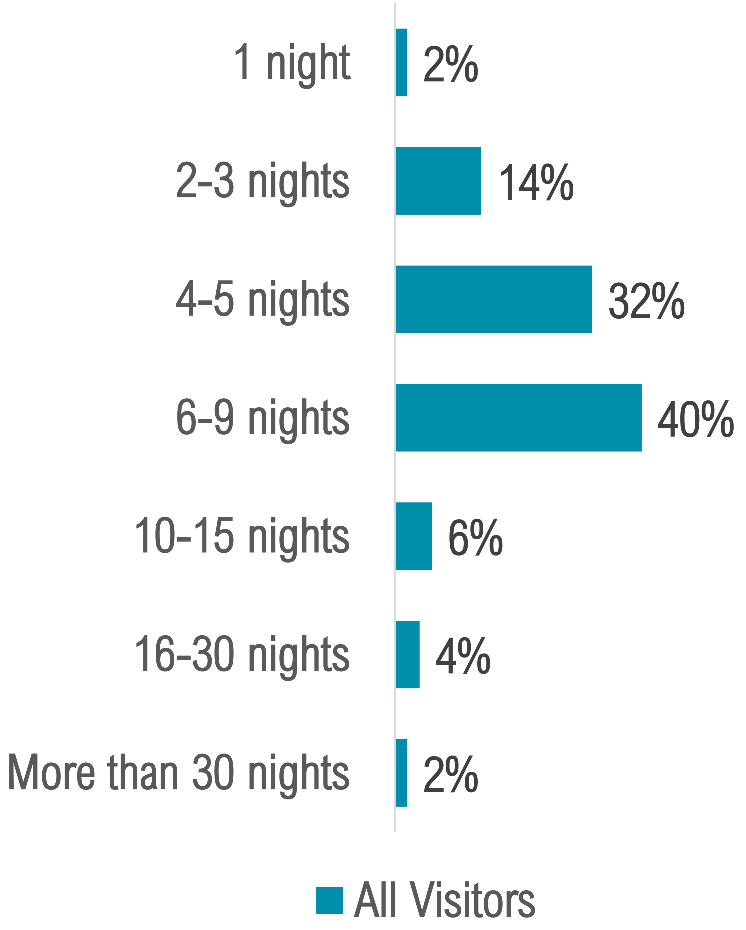
NIGHTS STAYED

All Visitors

Visitors spent an average of **5.8[1] nights** in the Fort Myers area.

Visitors Staying in Paid Accommodations

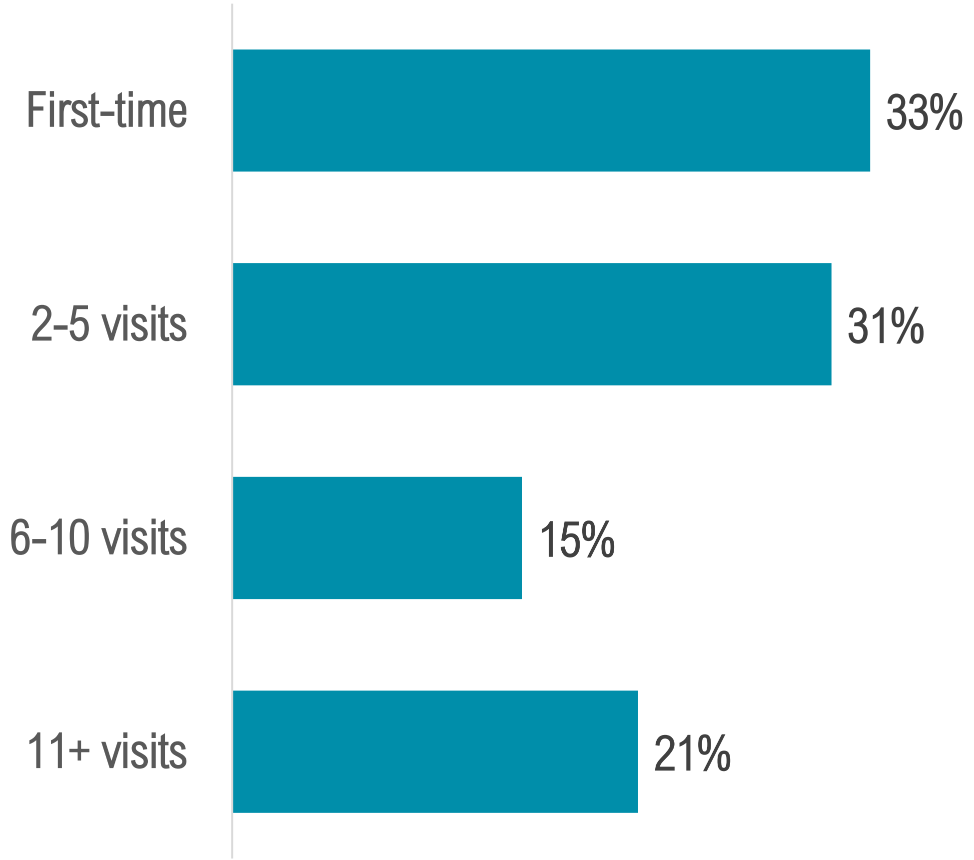
Visitors staying in paid accommodations spent an average of **5.5[2] nights** in the Fort Myers area.



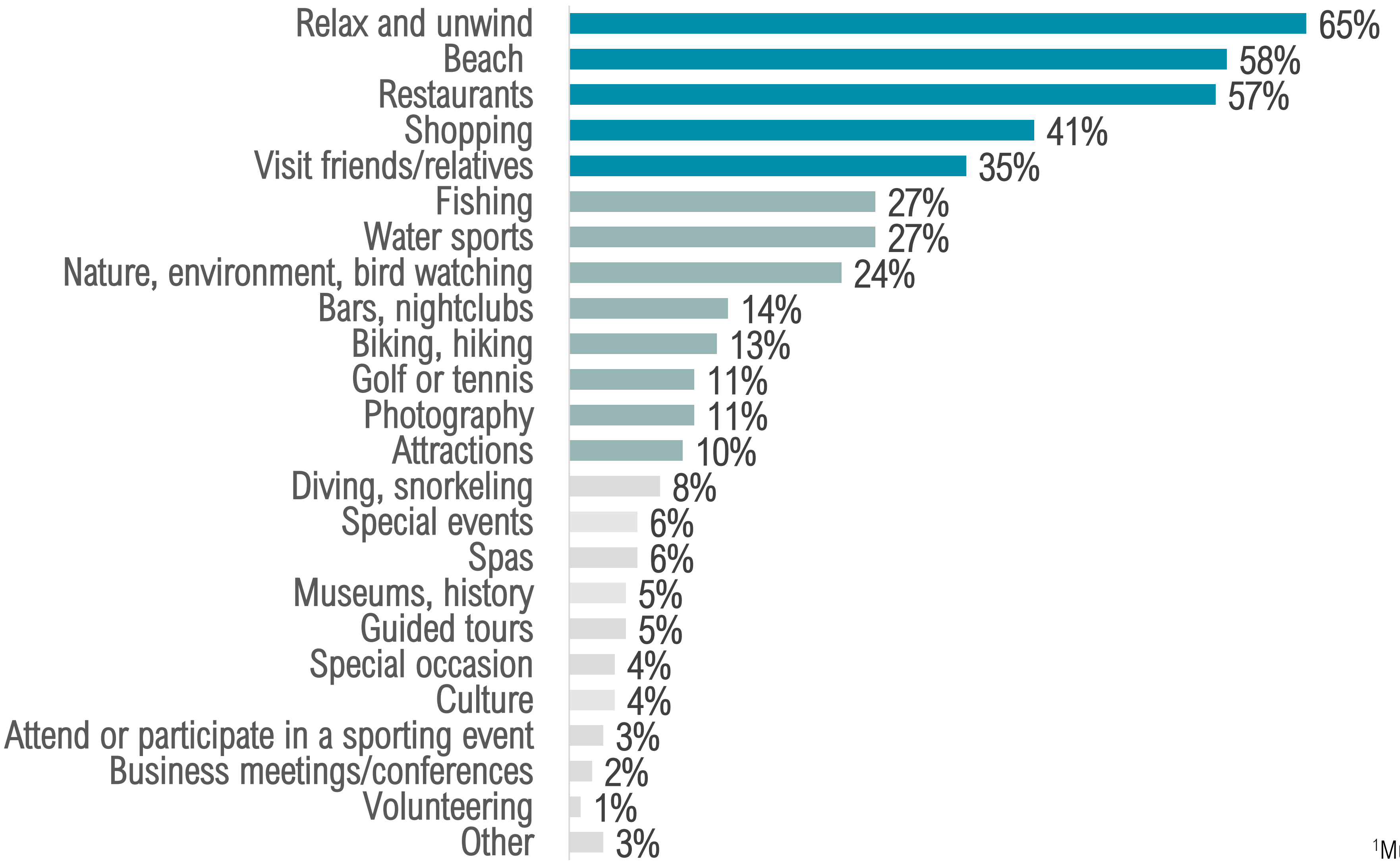
[1]Sources: Occupancy Study and Visitor Tracking Study
[2]Source: Occupancy Study

FIRST TIME AND EXPERIENCED VISITORS

1 in 3 visitors were visiting for the first time, while over 1 in 5 were highly loyal visitors, having visited more than 10 times.



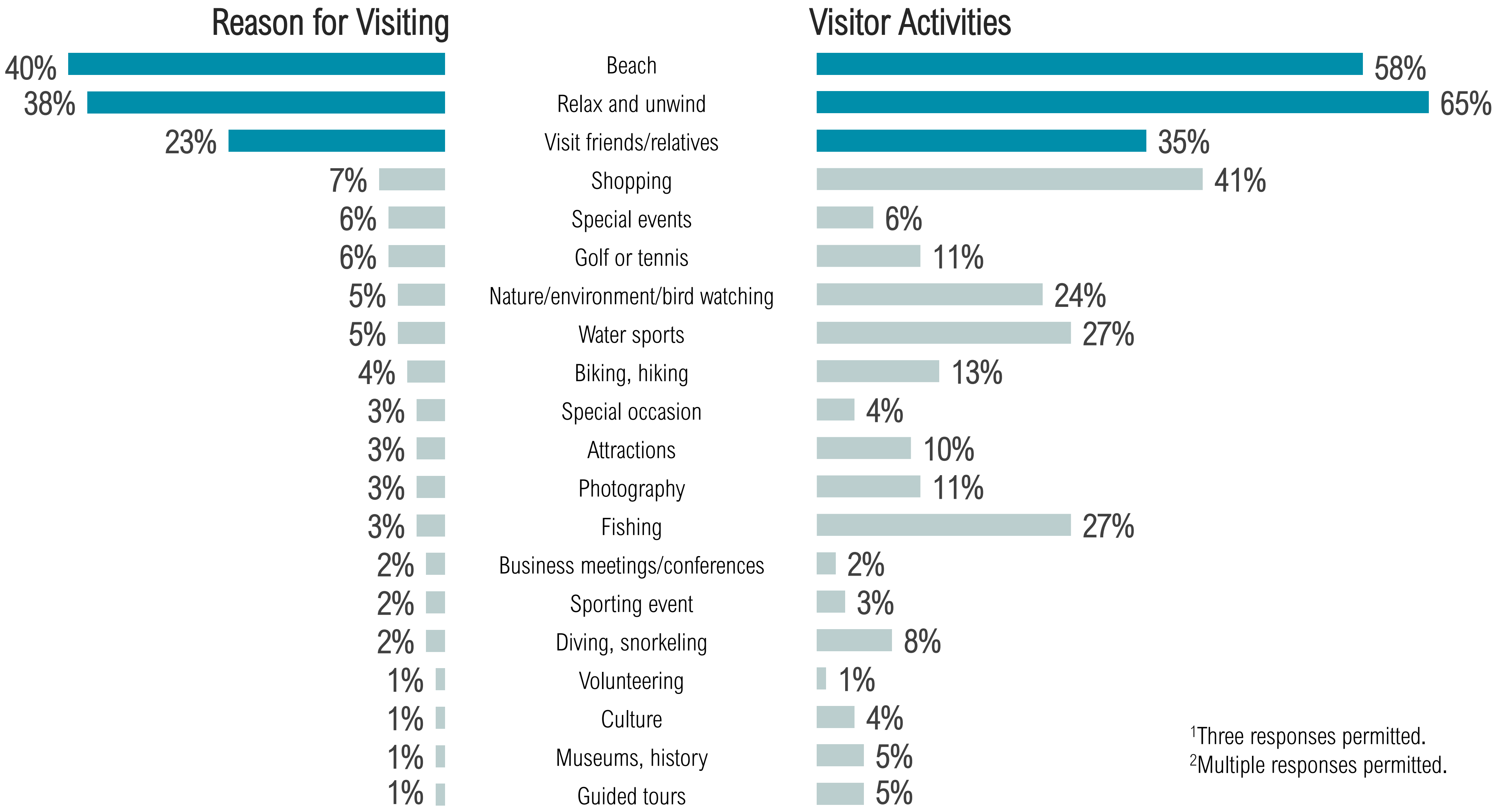
VISITOR ACTIVITIES[1]



Trip Experience
Jul - Sep 2023

[1]Multiple responses permitted.

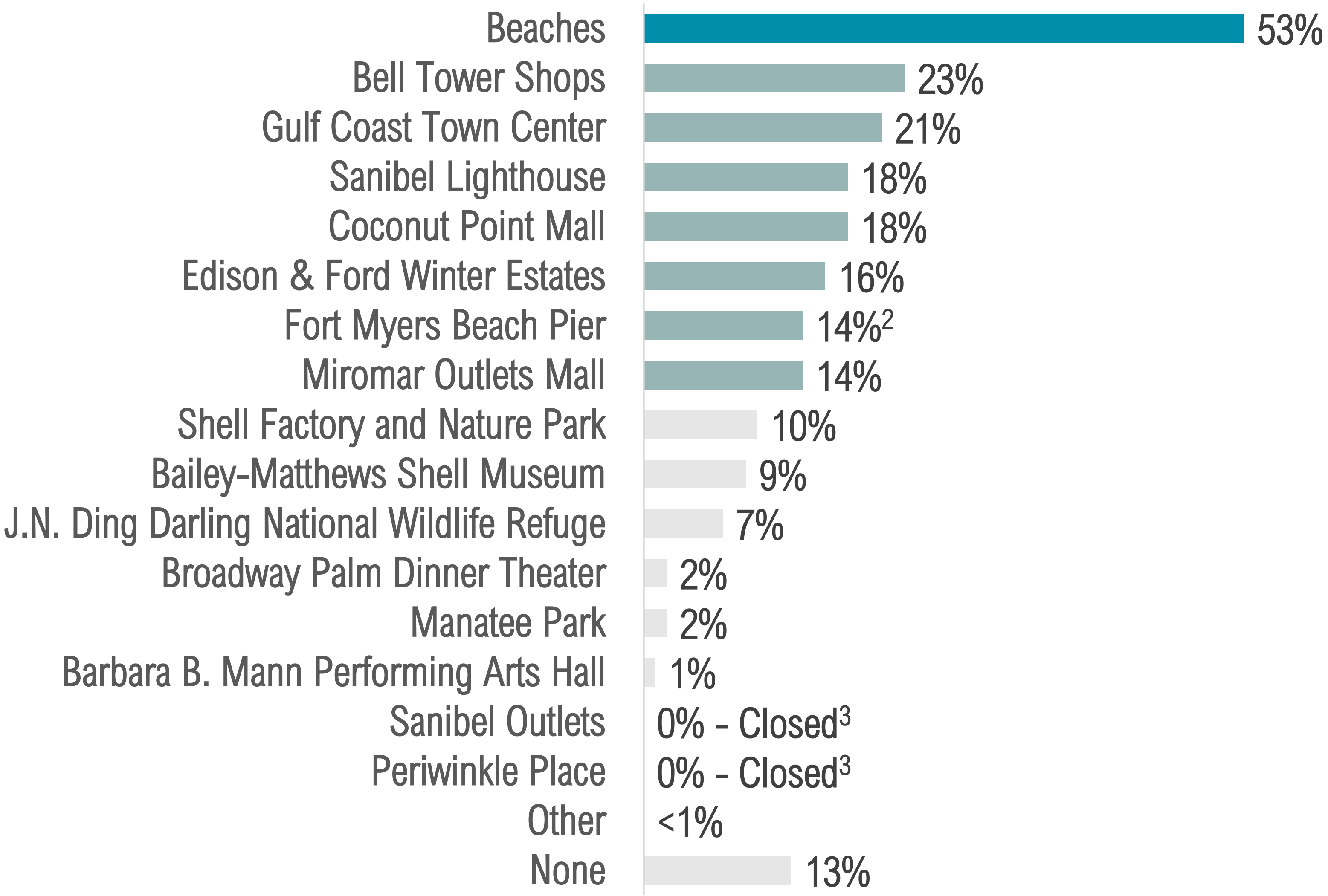
REASON FOR VISITING[1] VS. VISITOR ACTIVITIES[2]



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

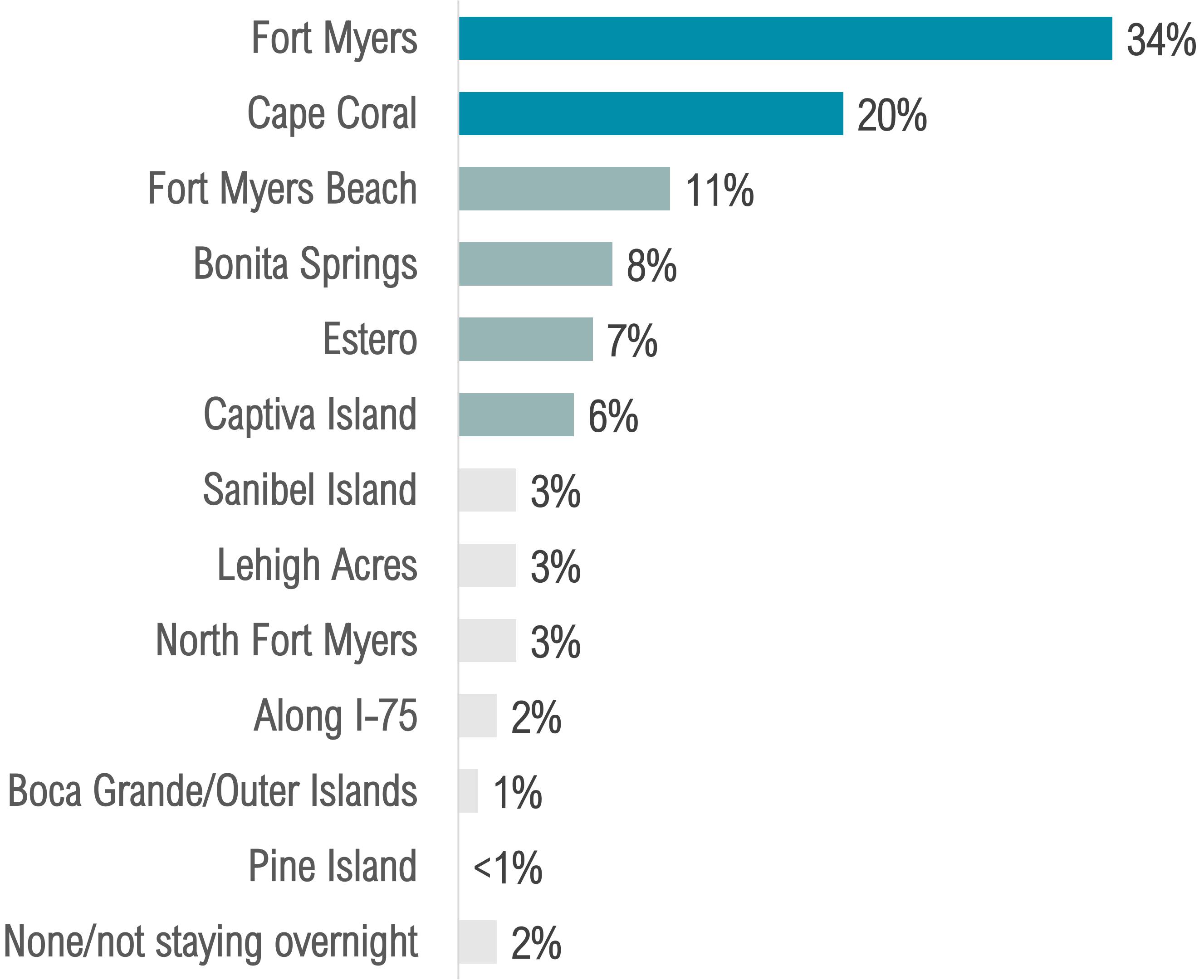
Jul - Sep 2023

ATTRACTIONS VISITED[1]



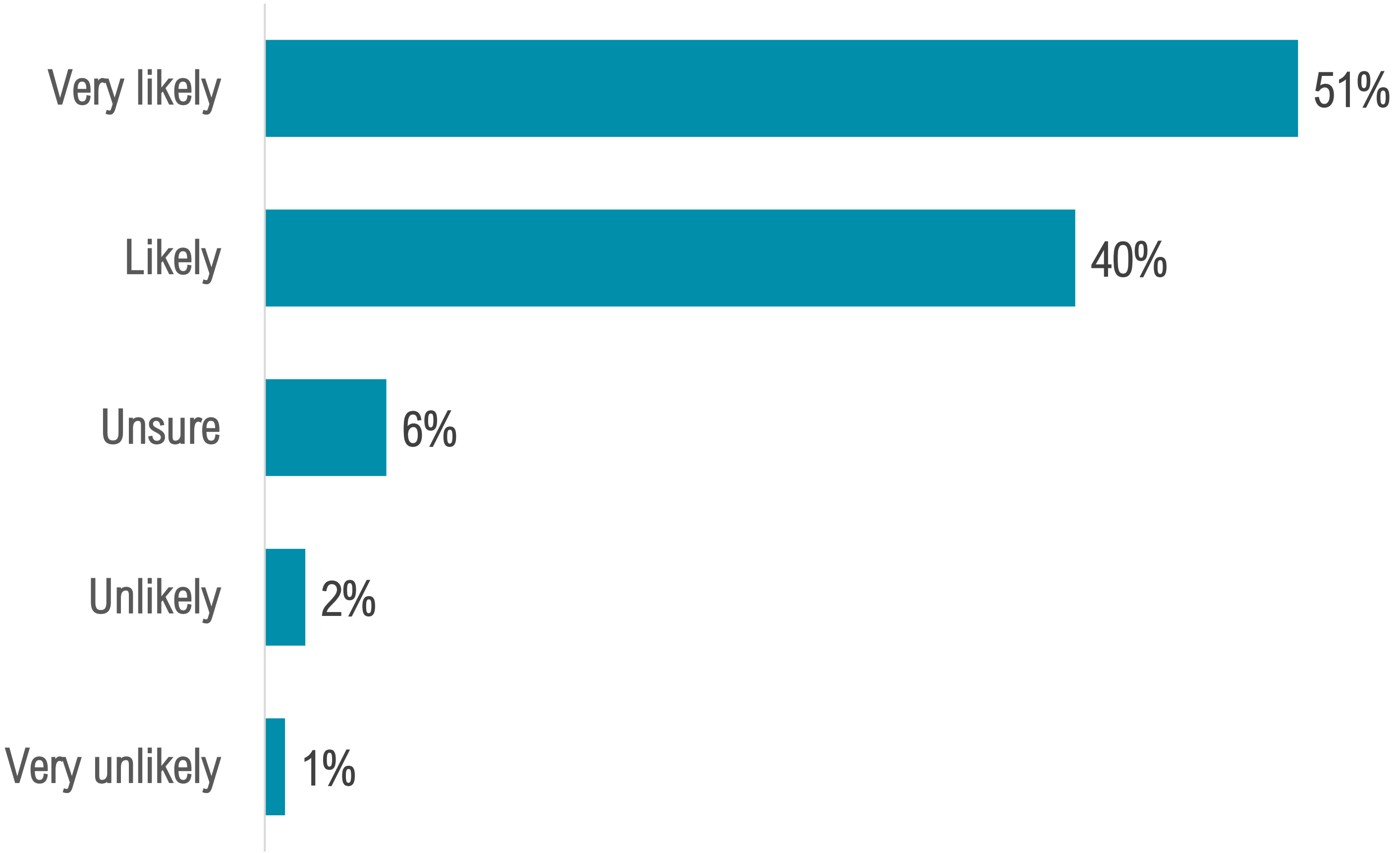
[1]Multiple responses permitted.
[2]Represents visitors who spent time on the beach area near where the pier was.
[3]Closed due to Hurricane Ian.

COMMUNITY STAYED

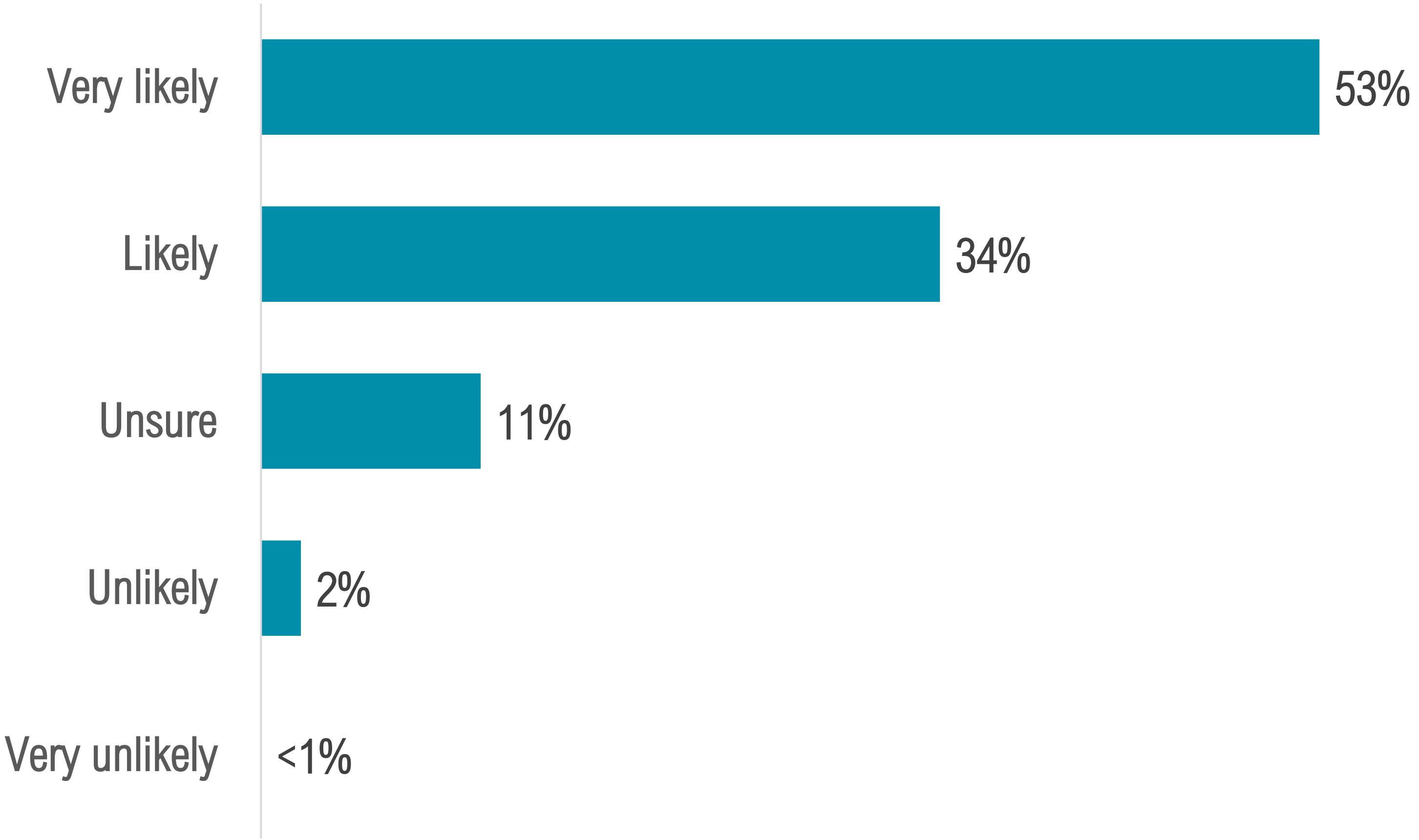


VISITOR JOURNEY: POST-TRIP EVALUATION

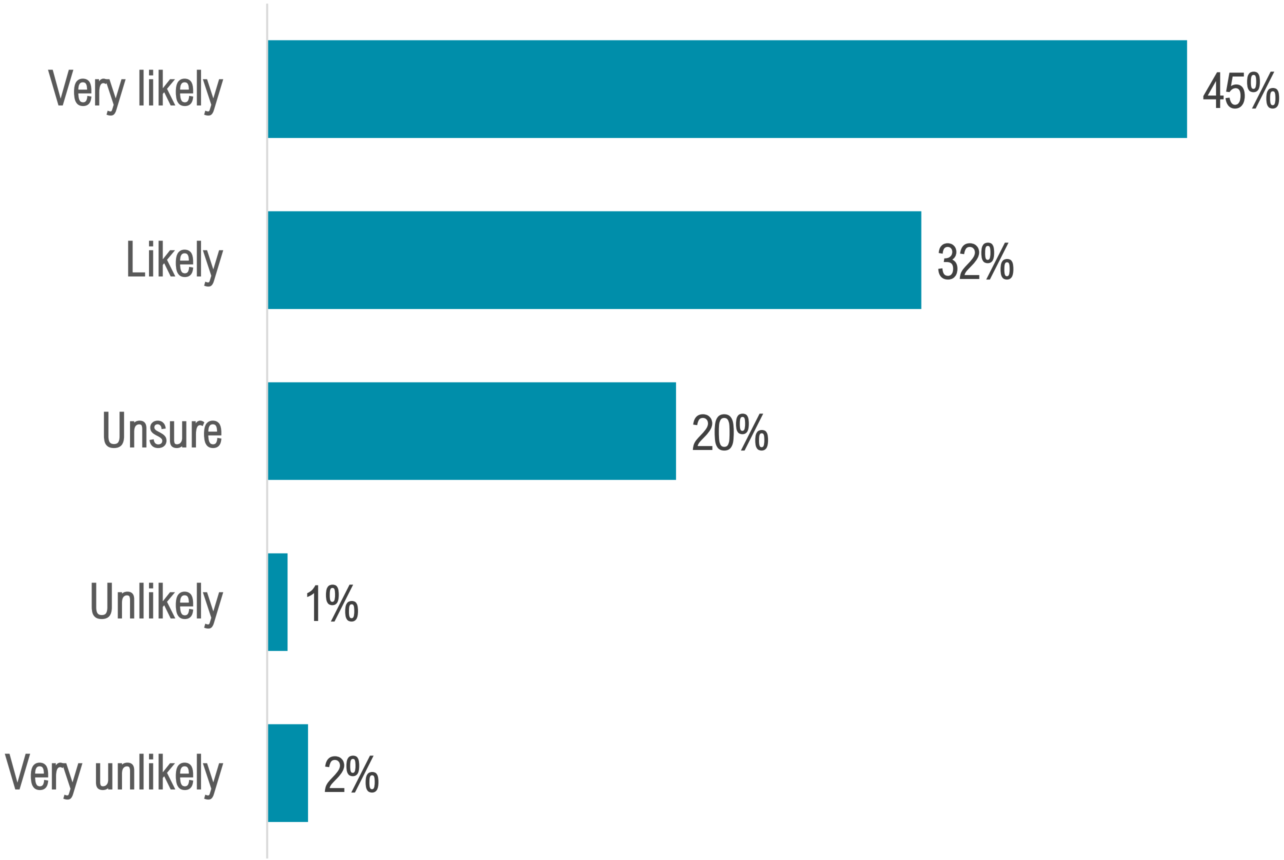
LIKELIHOOD OF RECOMMENDING THE AREA



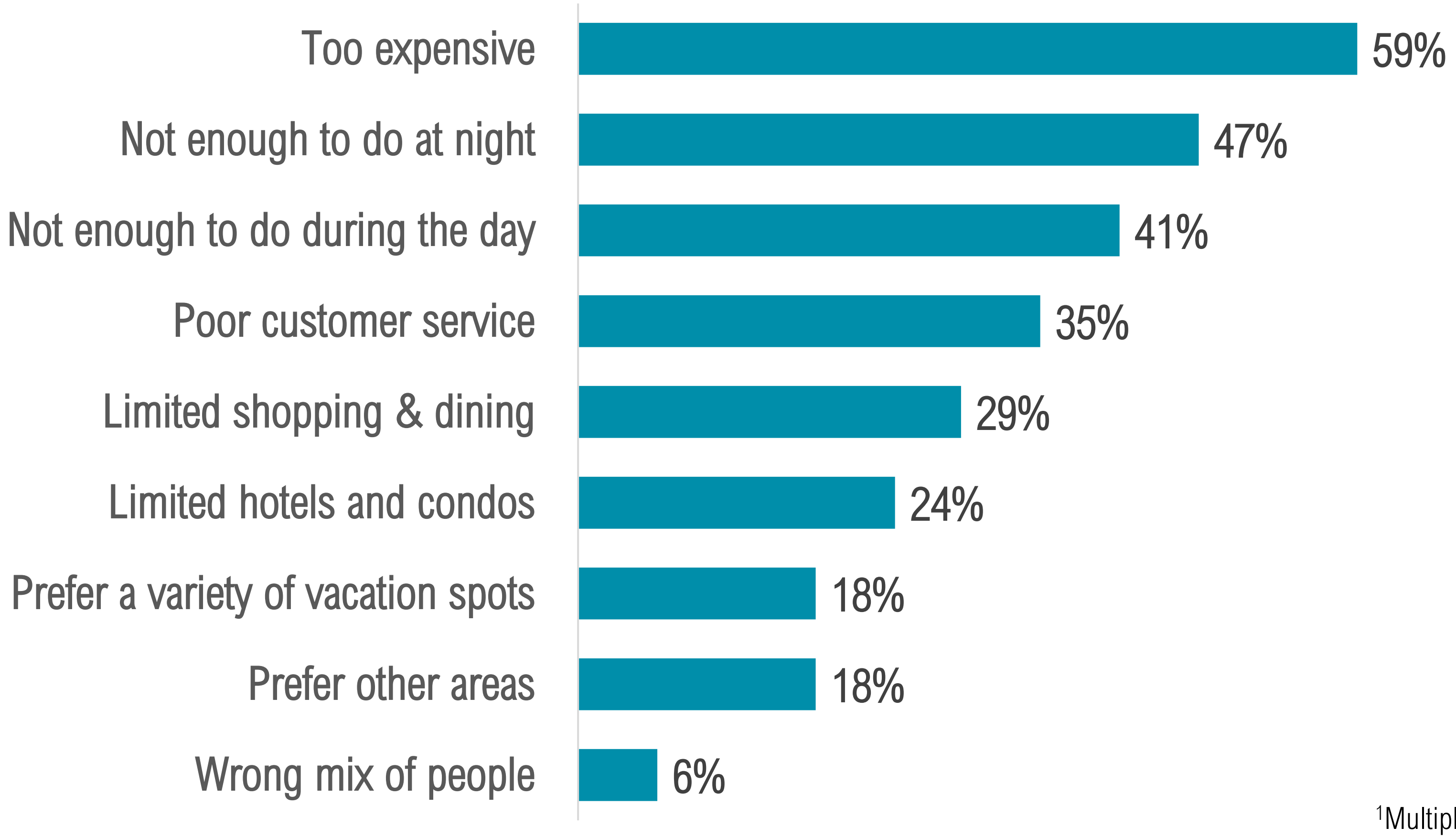
LIKELIHOOD OF RETURNING TO THE AREA



LIKELIHOOD OF RETURNING NEXT YEAR

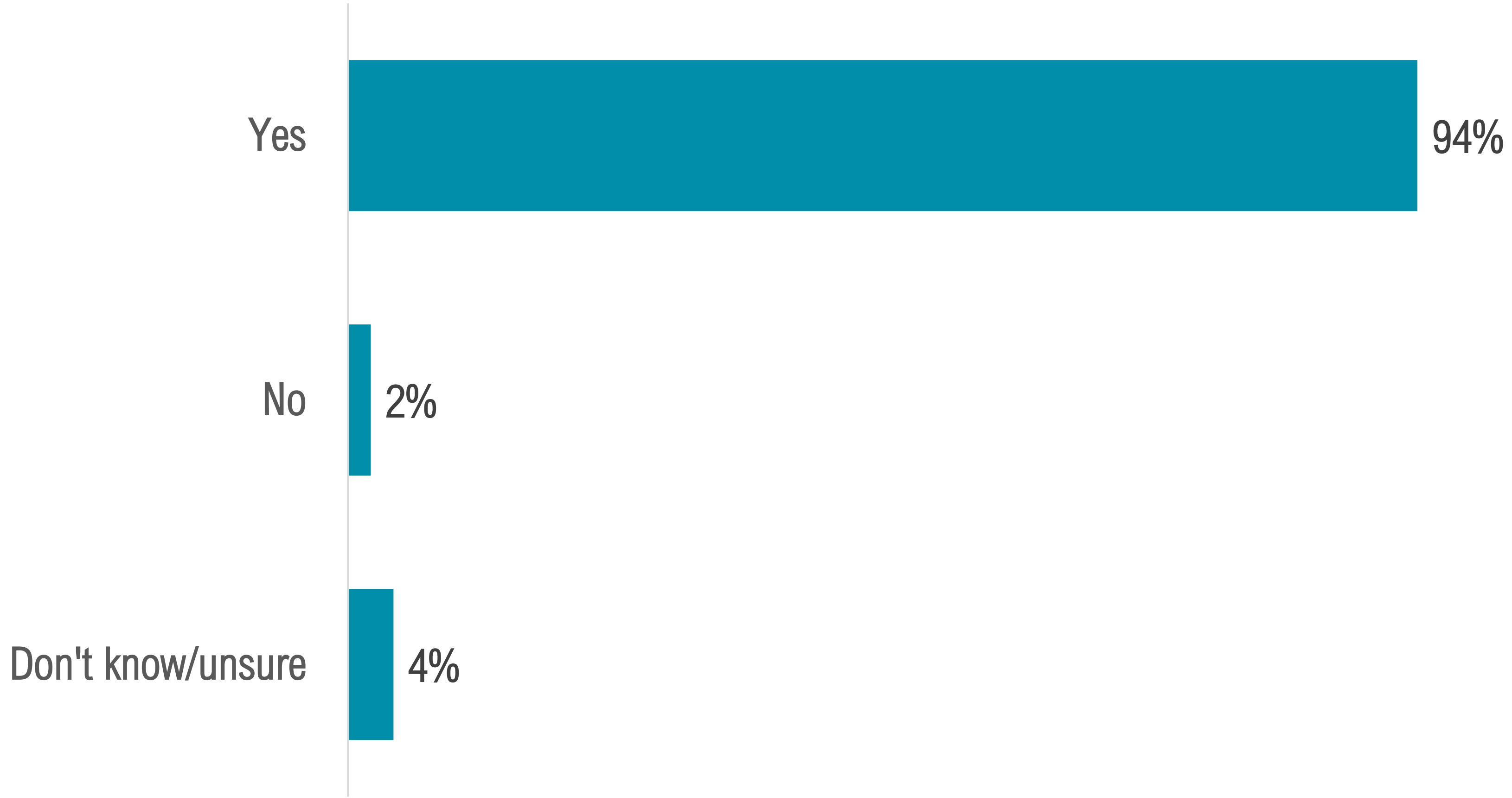


REASONS FOR NOT RETURNING[1]



[1]Multiple responses permitted. Only asked of respondents who said they were "very unlikely" or "unlikely" to return to the area which represents only 3% of all visitors.

FEELING OF WELCOMENESS



CROSSTABULATIONS: LIKELIHOOD OF RECOMMENDING[1]

<table>
<tr><th></th><th colspan="2">First Time Visitors</th><th colspan="2">Repeat Visitors</th><th colspan="2">Domestic Visitors</th><th colspan="2">Int’l Visitors</th></tr>
<tr><th></th><th>2022</th><th>2023</th><th>2022</th><th>2023</th><th>2022</th><th>2023</th><th>2022</th><th>2023</th></tr>
<tr><td>Very Likely</td><td rowspan="2">86%</td><td>45%</td><td rowspan="2">97%</td><td>53%</td><td rowspan="2">91%</td><td>52%</td><td rowspan="2">94%</td><td>51%</td></tr>
<tr><td>Likely</td><td>36%</td><td>40%</td><td>39%</td><td>40%</td></tr>
<tr><td>Unsure/don’t know</td><td>12%</td><td>13%</td><td>2%</td><td>5%</td><td>8%</td><td>8%</td><td>6%</td><td>6%</td></tr>
<tr><td>Unlikely</td><td rowspan="2">2%</td><td>4%</td><td rowspan="2">1%</td><td>1%</td><td rowspan="2">1%</td><td><1%</td><td rowspan="2">0%</td><td>2%</td></tr>
<tr><td>Very Unlikely</td><td>2%</td><td>1%</td><td>2%</td><td>1%</td></tr>
</table>

[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]

<table>
<tr><th></th><th colspan="2">First Time Visitors</th><th colspan="2">Repeat Visitors</th><th colspan="2">Domestic Visitors</th><th colspan="2">Int’l Visitors</th></tr>
<tr><th></th><th>2022</th><th>2023</th><th>2022</th><th>2023</th><th>2022</th><th>2023</th><th>2022</th><th>2023</th></tr>
<tr><td>Very Likely</td><td rowspan="2">75%</td><td>44%</td><td rowspan="2">93%</td><td>57%</td><td rowspan="2">85%</td><td>59%</td><td rowspan="2">77%</td><td>53%</td></tr>
<tr><td>Likely</td><td>28%</td><td>36%</td><td>25%</td><td>35%</td></tr>
<tr><td>Unsure/don’t know</td><td>22%</td><td>20%</td><td>6%</td><td>7%</td><td>12%</td><td>15%</td><td>23%</td><td>9%</td></tr>
<tr><td>Unlikely</td><td rowspan="2">3%</td><td>7%</td><td rowspan="2">1%</td><td>1%</td><td rowspan="2">3%</td><td><1%</td><td rowspan="2">0%</td><td>3%</td></tr>
<tr><td>Very Unlikely</td><td>1%</td><td><1%</td><td>2%</td><td><1%</td></tr>
</table>

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

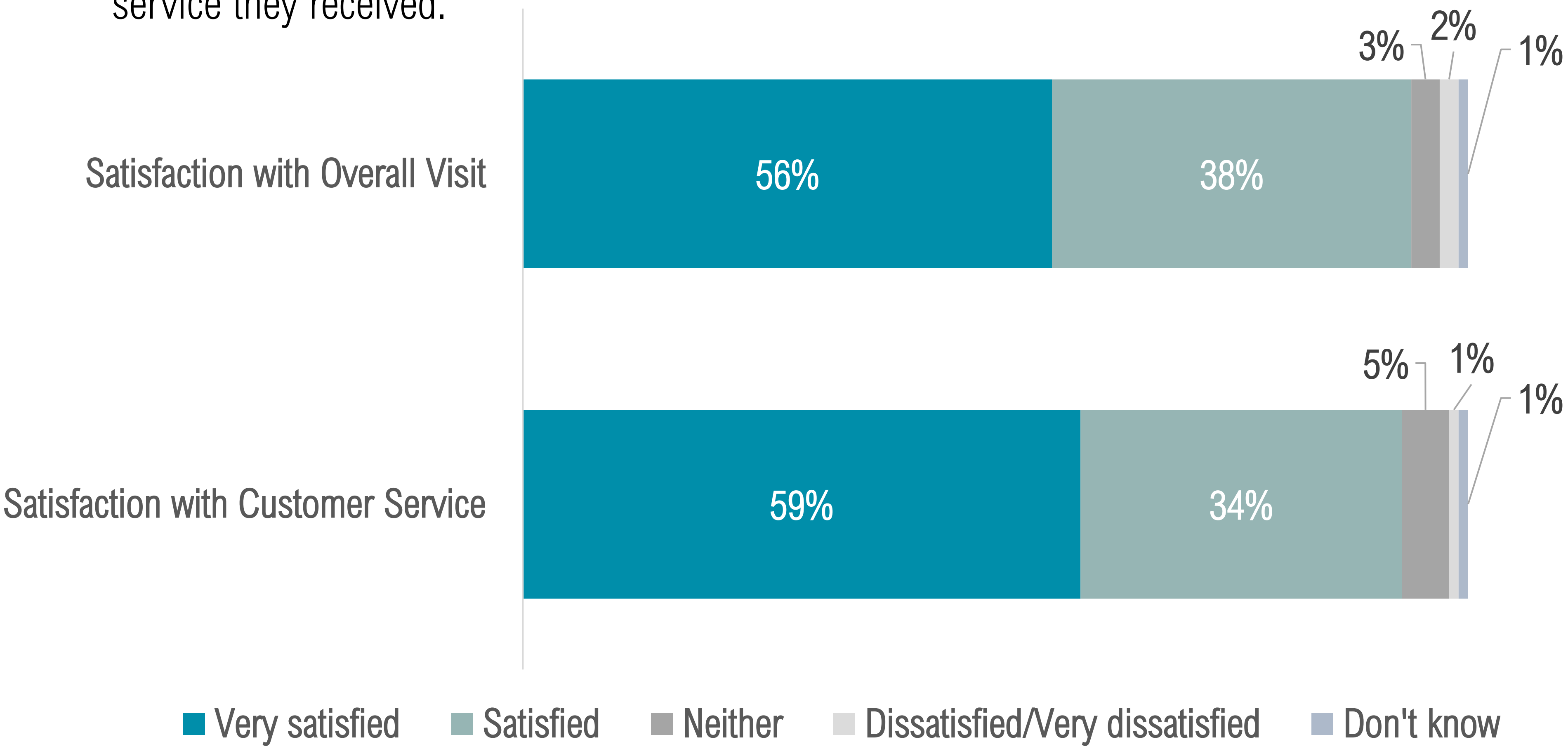
CROSSTABULATIONS: LIKELIHOOD OF RETURNING NEXT YEAR[1]

<table>
<tr><th></th><th colspan="2">First Time Visitors</th><th colspan="2">Repeat Visitors</th><th colspan="2">Domestic Visitors</th><th colspan="2">Int'l Visitors</th></tr>
<tr><th></th><th>2022</th><th>2023</th><th>2022</th><th>2023</th><th>2022</th><th>2023</th><th>2022</th><th>2023</th></tr>
<tr><td>Very Likely</td><td rowspan="2">38%</td><td>42%</td><td rowspan="2">66%</td><td>48%</td><td rowspan="2">60%</td><td>50%</td><td rowspan="2">54%</td><td>45%</td></tr>
<tr><td>Likely</td><td>27%</td><td>32%</td><td>27%</td><td>32%</td></tr>
<tr><td>Unsure/don't know</td><td>58%</td><td>23%</td><td>31%</td><td>20%</td><td>36%</td><td>23%</td><td>43%</td><td>20%</td></tr>
<tr><td>Unlikely</td><td rowspan="2">4%</td><td>4%</td><td rowspan="2">3%</td><td><1%</td><td rowspan="2">4%</td><td><1%</td><td rowspan="2">3%</td><td>1%</td></tr>
<tr><td>Very Unlikely</td><td>5%</td><td>1%</td><td><1%</td><td>2%</td></tr>
</table>

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

SATISFACTION

- Compared to 2022, visitors were **more** likely to be **very satisfied** with their overall visit or the customer service they received.



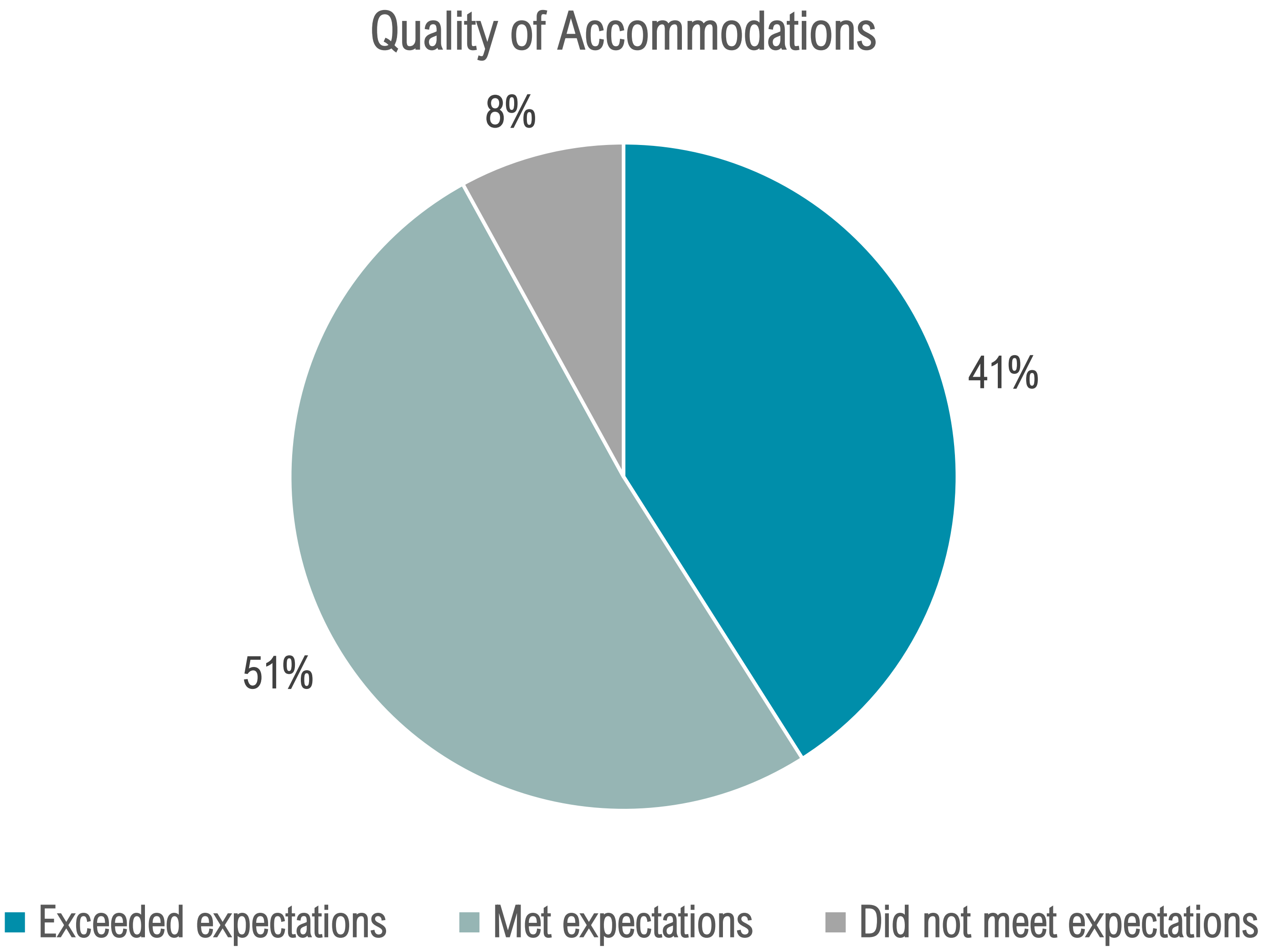
CROSSTABULATIONS: SATISFACTION WITH OVERALL VISIT

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2022	2023	2022	2023	2022	2023	2022	2023
Very Satisfied	28%	50%	52%	60%	42%	63%	32%	55%
Satisfied	59%	39%	45%	37%	50%	33%	65%	39%
Unsure/don't know	9%	5%	3%	3%	6%	4%	3%	3%
Dissatisfied	4%	5%	0%	0%	2%	0%	0%	2%
Very Dissatisfied	0%	1%	0%	0%	0%	0%	0%	1%

CROSSTABULATIONS: SATISFACTION WITH SERVICE

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2022	2023	2022	2023	2022	2023	2022	2023
Very Satisfied	28%	59%	52%	60%	42%	68%	27%	58%
Satisfied	56%	27%	42%	35%	46%	24%	68%	35%
Unsure/don't know	6%	11%	5%	4%	6%	8%	4%	6%
Dissatisfied	9%	4%	1%	1%	5%	0%	1%	1%
Very Dissatisfied	1%	0%	0%	0%	1%	0%	0%	0%

SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

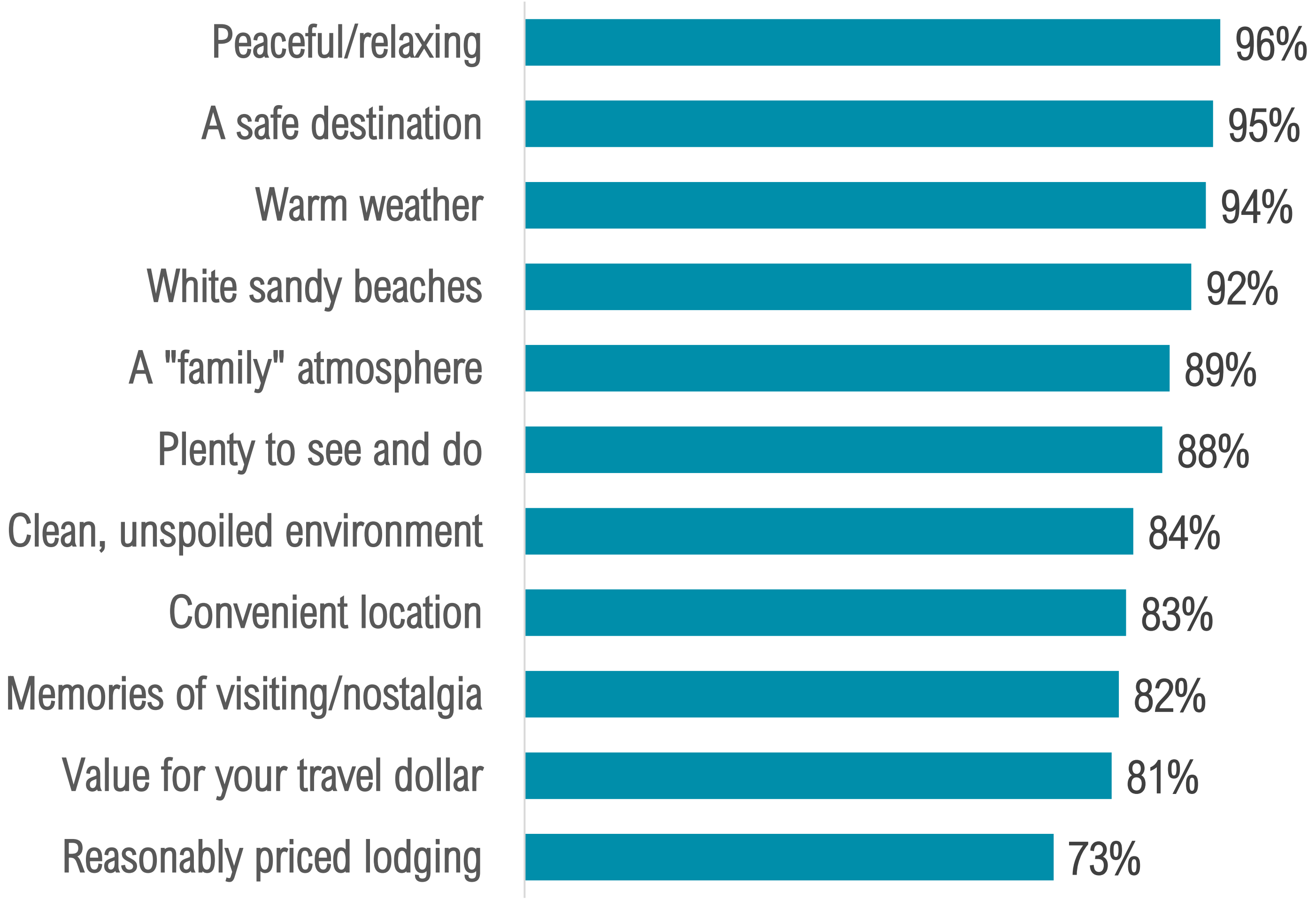


SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

	1st Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2022	2023	2022	2023	2022	2023	2022	2023
Exceeded Expectations	33%	43%	41%	40%	35%	55%	45%	39%
Met Expectations	58%	45%	55%	55%	58%	39%	51%	53%
Did Not Meet Expectations	9%	12%	4%	5%	7%	6%	4%	8%

ATTRIBUTE RATINGS[1]

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



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

VACATION ATTRIBUTE INFLUENCE VS. RATINGS

Vacation Influences[1]	Attribute	Fort Myers Area Ratings[2]
91%	Peaceful/relaxing	96%
87%	A safe destination	95%
86%	Warm weather	94%
86%	White sandy beaches	92%
82%	Plenty to see and do	88%
81%	Clean, unspoiled environment	84%
80%	A "family" atmosphere	89%
79%	Convenient location	83%
76%	Value for your travel dollar	81%
76%	Memories of past/nostalgia	82%
71%	Reasonably priced lodging	73%

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

LEAST LIKED FEATURES[1]

Over 1 in 4 visitors mentioned hurricane damage, while under 1 in 4 were concerned with traffic, and another 26% 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

Peaceful & Relaxing

- “Peaceful, beautiful scenery and weather, and nice people.”
- “Amazing. I’ve been coming here for 20 years, it’s so relaxing.”
- “Awesome times with our friends, a gorgeous relaxing environment, great fishing, and snorkeling.”
- “If you're looking for a place to relax and unwind, come to Cape Coral!”

A Safe Destination

- “Family friendly, clean, and safe. Always a fabulous time staying here at our condo.”
- “Clean and safe, and we’ve been having an awesome time golfing on pristine courses in great weather.”
- “The best place to vacation with great weather, a tropical environment, and it’s family-oriented.”

AREA DESCRIPTIONS

White Sandy Beaches

- "Extremely fun time at the beautiful beaches that have palm trees, white sands, and good snorkeling."
- "Gorgeous area, subtropical environment, white sandy beaches, plenty of sunshine."
- "We love the white sandy beaches, the smaller town vibes, and we have family here so it's like a second home for us."

Warm Weather

- "Definitely one of our favorite spots to vacation. There's usually plenty of sunshine and great weather."
- "We're having a really great time. The weather has been perfect, the beaches are gorgeous, and there's some great kayaking."
- "The weather is usually great and there are plenty of outdoor activities to do, especially if you like golf."

OCCUPANCY BAROMETER[1]: OCT - DEC RESERVATIONS

Oct – Dec Reservations	Oct – Dec 2022	Oct - Dec 2023
Up	27%	40%
Same	2%	14%
Down	71%	46%

[1]Sources: Occupancy Survey
Accommodations partners were asked the following, "Please think about your reservations for the next three months. Compared to October - December of 2022, would you say the total level of reservations are up, the same, or down?"

OCCUPANCY BAROMETER[1]: JAN - MAR RESERVATIONS

Jan - Mar Reservations	Jan - Mar 2022	Jan - Mar 2023
Up	26%	33%
Same	16%	24%
Down	58%	43%

[1]Sources: Occupancy Survey

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

Year-Over-Year Comparisons

ECONOMIC IMPACT

Visitor & Lodging Statistics	July - Sept 2022	July - Sept 2023	% Change '22 – '23
Visitors	1,114,000	706,700	-36.6%
Visitor Days	5,618,600	4,113,000	-26.8%
Room Nights	1,265,400	865,200	-31.6%
Direct Expenditures[1]	$812,265,900	$584,185,900	-28.1%
Total Economic Impact[2]	$1,293,939,600	$935,281,600	-27.7%
Occupancy	56.1%	50.6%	-9.8%
ADR	$167.69	$134.26	-19.9%
RevPAR	$94.09	$67.94	-27.8%

[1] Includes: accommodations, restaurants, entertainment, shopping, transportation, groceries, and "other" expenses.
[2] Economic impact includes indirect and induced effects of visitor spending. Indirect effects are increased business spending resulting from tourism dollars. Induced effects are increased household spending resulting from tourism dollars.

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM[1]

	July - Sept 2022	July - Sept 2023	% Change '22 – '23
Direct Jobs[2]	10,960	7,280	-33.6%
Total Jobs[3]	15,100	9,620	-36.3%
Direct Wages[2]	$257,590,900	$210,786,800	-18.2%
Total Wages[3]	$438,862,500	$296,858,700	-32.4%
Direct Local Taxes[2]	$25,649,500	$15,263,800	-40.5%
Total Local Taxes[3]	$45,626,600	$20,008,600	-56.1%
Direct State Taxes[2]	$60,703,800	$27,761,900	-54.3%
Total State Taxes[3]	$88,529,200	$36,607,400	-58.6%

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

VISITOR TYPE

Visitor Type	July - Sept 2022	July - Sept 2023
Visitors in Paid Accommodations	76%	67%
Visitors in Non-Paid Accommodations	22%	31%
Day Trippers	2%	2%

PRE-VISIT

Planned trip in advance	July - Sept 2022	July - Sept 2023
1 week or less	4%	7%
2-4 weeks	7%	9%
1-2 months	42%	38%
3-6 months	34%	33%
6 months or more	12%	13%
Not sure	1%	0%

Considered Other Destinations	July - Sept 2022	July - Sept 2023
Yes	54%	43%
No	46%	57%

PRE-VISIT

Other destinations considered[1]	July - Sept 2022[2]	July - Sept 2023[2]
Tampa/Clearwater/St.Pete	13%	21%
Naples/Marco Island	11%	18%
Orlando	12%	17%
Sarasota/Siesta Key	9%	14%
Daytona Beach	12%	13%
Keys/Key West	9%	12%
Miami/Ft. Lauderdale	7%	11%
West Palm Beach	6%	10%
Punta Gorda/Englewood	3%	4%
Other destinations in FL	18%	13%
Other destinations outside of FL	36%	26%

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

PRE-VISIT

Trip Planning Websites/Apps[1]	July - Sept 2022	July - Sept 2023
Online search engines	38%	31%
Airline websites/apps	34%	30%
Airbnb, VRBO, HomeAway etc.	24%	21%
Booking websites	20%	16%
Vacation rental websites/apps	19%	14%
Traveler reviews, blogs, stories	22%	14%
Trip Advisor	13%	12%
Hotel websites/apps	12%	12%
Facebook	11%	10%
Visit Florida	14%	8%
VCB Facebook Page	9%	8%
Instagram	7%	6%
www.VisitFortMyers.com	8%	6%
YouTube, Hulu, Pandora	3%	4%
Other	3%	3%
None	7%	18%

[1]Multiple responses permitted.

PRE-VISIT

Information Requests[1]	July - Sept 2022	July - Sept 2023
Calling a hotel, motel, condo	41%	33%
Requesting and receiving a visitor guide	14%	9%
Calling the VCB	10%	5%
Receiving the VCB e-newsletter	3%	2%
Calling a local Chamber of Commerce	3%	2%
Other	2%	2%
None	36%	57%

[1]Multiple responses permitted.

PRE-VISIT

Recall of Lee County Promotions	July - Sept 2022	July - Sept 2023
Yes	55%	43%
No	30%	38%
Can't recall	15%	19%
% of recallers influenced by promotions	53%	47%
% of total visitors influenced by promotions	29%	21%

PRE-VISIT

Type of Promotions Recalled[1]	July - Sept 2022[2]	July - Sept 2023[3]
Internet	66%	56%
Social media	36%	39%
Traveler reviews, blogs	34%	27%
Television	8%	10%
Travel/visitor guide	7%	7%
www.VisitFortMyers.com	7%	7%
Video streaming services	-	7%
Email/e-newsletter	-	6%
Magazine	6%	5%
Newspaper	2%	4%
AAA	5%	4%
Billboard	5%	2%
Brochure	5%	2%
Deal-based promotion	3%	2%
Radio	2%	1%
Music streaming services	-	1%
Podcasts	-	1%
Other	2%	4%

[1]Multiple responses permitted.
[2]Base: 55% of visitors who recalled seeing a promotion.
[3]Base: 43% of visitors who recalled seeing a promotion.

PRE-VISIT

Characteristics influencing decision to visit Lee County (top 2 boxes)[1]	July - Sept 2022	July - Sept 2023
Peaceful/relaxing	96%	91%
A safe destination	93%	87%
Warm weather	91%	86%
White sandy beaches	91%	86%
Plenty to see and do	87%	82%
Clean, unspoiled environment	86%	81%
A "family" atmosphere	84%	80%
Convenient location	76%	79%
Value for your travel dollar	84%	76%
Memories of past visits/nostalgia	-	76%
Reasonably priced lodging	83%	71%

[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]	July - Sept 2022	July - Sept 2023
Beach	47%	40%
Relax & unwind	27%	38%
Visiting friends & relatives	9%	23%
Part-time resident ("Snowbird")	-	14%
Checking on my property	-	11%
Business meetings/conferences	1%	7%
Shopping	4%	7%
Special event	1%	6%
Golf or tennis	2%	6%
Nature, environment, bird watching	4%	5%
Water sports	4%	5%
Biking, hiking	1%	4%
Special occasion	3%	3%
Attractions	1%	3%
Fishing	5%	3%
Photography	2%	3%
Sporting event	1%	2%
Diving, snorkeling	1%	2%
Work-related Hurricane Recovery	-	2%
Culture	1%	1%
Museums, history	1%	1%
Guided tours	1%	1%
Volunteering	1%	1%
Other	2%	4%

[1]Multiple responses permitted.

PRE-VISIT

Transportation	July - Sept 2022	July - Sept 2023
Fly	78%	78%
Drive a personal vehicle	18%	16%
Drive a rental vehicle	2%	5%
Drive a RV	1%	1%
Travel by bus	1%	0%
Other	0%	0%

Airport Used	July - Sept 2022	July - Sept 2023
Southwest Florida International	85%	86%
Punta Gorda	6%	6%
Ft. Lauderdale International	4%	3%
Miami International	2%	2%
Tampa International	2%	2%
Orlando International	1%	1%
Other	<1%	<1%

TRAVEL PARTY PROFILE

Visitor Origin[1]	July - Sept 2022	July - Sept 2023
Florida	4.6%	5.2%
Southeast	21.1%	20.7%
Northeast	14.4%	19.8%
Midwest	37.3%	32.0%
West	9.8%	9.0%
Canada	7.4%	6.8%
United Kingdom	0.2%	1.0%
Germany	2.1%	3.0%
Other Europe	2.1%	1.2%
Other International	1.0%	1.3%

Visitor Origin[1]	July - Sept 2022	July - Sept 2023
NEW YORK	4%	9%
CHICAGO	6%	5%
CLEVELAND - AKRON	6%	5%
ATLANTA	6%	4%
CINCINNATI	6%	3%
WASHINGTON, DC - HAGERSTOWN	3%	3%

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

TRAVEL PARTY PROFILE

Travel Parties	July - Sept 2022	July - Sept 2023
Mean travel party size[1]	3.1	3.0
Travel with children under age 18	56%	44%

Travel Party Composition	July - Sept 2022	July - Sept 2023
As a family	64%	54%
As a couple	24%	28%
By yourself	4%	8%
With other couples/friends	7%	7%
With business associates	1%	2%
In a tour group	<1%	<1%
Other	<1%	1%

[1]Sources: Occupancy Study and Visitor Tracking Study

TRAVEL PARTY PROFILE

Marital Status	July - Sept 2022	July - Sept 2023
Married/Domestic Partnership	69%	73%
Single	31%	27%

Age	July - Sept 2022	July - Sept 2023
Average age	52	50
Median age	44	47

Household Income	July - Sept 2022	July - Sept 2023
Median Income	$108,600	$105,600

TRAVEL PARTY PROFILE

Race/Ethnicity	July - Sept 2022	July - Sept 2023
Caucasian/White	78%	76%
Hispanic/Latino/Latina/Latinx	11%	13%
African American/Black	2%	3%
Asian/Asian American/Pacific Islander	3%	3%
Middle Eastern/Northern African	-	1%
Another race/ethnicity	6%	4%

Gender	July - Sept 2022	July - Sept 2023
Female	46%	50%
Male	54%	50%
Non-binary	<1%	<1%

TRIP EXPERIENCE

Length of Stay[1]	July - Sept 2022	July - Sept 2023
Average nights in the Fort Myers area	5.0	5.8

First Time/Repeat Visitors	July - Sept 2022	July - Sept 2023
First-time	42%	33%
Repeat	58%	67%

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

TRIP EXPERIENCE

Type of Accommodations	July - Sept 2022	July - Sept 2023
Not spending the night	2%	2%
Hotel/motel/resort	37%	32%
Vacation rental home	36%	30%
Personal condo, house, timeshare, etc.	14%	17%
Friends/family home	8%	14%
Bed & Breakfast/Inn	2%	3%
Campground/RV Park	1%	1%
Other	0%	1%

TRIP EXPERIENCE

Activities[1]	July - Sept 2022	July - Sept 2023
Relax and unwind	64%	65%
Beach	66%	58%
Restaurants	54%	57%
Shopping	43%	41%
Visit friends/relatives	26%	35%
Fishing	28%	27%
Water sports	34%	27%
Nature, environment, bird watching	26%	24%
Bars, nightclubs	12%	14%
Biking, hiking	22%	13%
Golf or tennis	9%	11%
Photography	8%	11%
Attractions	6%	10%
Diving, snorkeling	11%	8%
Special events	3%	6%
Spas	8%	6%
Museums, history	3%	5%
Guided tours	5%	5%
Special occasion	4%	4%
Culture	3%	4%
Attend or participate in a sporting event	3%	3%
Business meetings/conferences	1%	2%
Volunteering	1%	1%
Other	2%	3%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Attractions[1]	July - Sept 2022	July - Sept 2023
Beaches	64%	53%
Bell Tower Shops	15%	23%
Gulf Coast Town Center	12%	21%
Sanibel Lighthouse	32%	18%
Coconut Point Mall	12%	18%
Edison & Ford Winter Estates	17%	16%
Fort Myers Beach Pier	42%	14%
Miromar Outlets Mall	9%	14%
Shell Factory and Nature Park	17%	10%
Bailey-Matthews Shell Museum	7%	9%
J.N. Ding Darling National Wildlife Refuge	13%	7%
Broadway Palm Dinner Theater	1%	2%
Manatee Park	3%	2%
Barbara B. Mann Performing Arts Hall	1%	1%
Periwinkle Place[3]	22%	0%
Sanibel Outlets[3]	14%	0%
Other	3%	<1%
None	5%	13%

[1]Multiple responses permitted.
[2]Represents visitors who spent time on the beach area near where the pier was.
[3]Closed until further notice due to Hurricane Ian.

TRIP EXPERIENCE

Area stayed	July - Sept 2022	July - Sept 2023
Fort Myers	11%	34%
Cape Coral	11%	20%
Fort Myers Beach	36%	11%
Bonita Springs	5%	8%
Estero	3%	7%
Captiva Island	3%	6%
Sanibel Island	27%	3%
Lehigh Acres	1%	3%
North Fort Myers	1%	3%
Along I-75	<1%	2%
Boca Grande/Outer Islands	<1%	1%
Pine Island	<1%	<1%
None/not staying overnight	2%	2%

POST-TRIP EVALUATION

Likelihood of Recommending the Area	July - Sept 2022	July - Sept 2023
Very Likely	93%	51%
Likely		40%
Unsure/don't know	6%	6%
Unlikely	1%	2%
Very Unlikely		1%

Likelihood of Returning to the Area	July - Sept 2022	July - Sept 2023
Very Likely	87%	53%
Likely		34%
Unsure/don't know	11%	11%
Unlikely	2%	2%
Very Unlikely		0%

Likelihood of Returning Next Year	July - Sept 2022	July - Sept 2023
Very Likely	56%	45%
Likely		32%
Unsure/don't know	39%	20%
Unlikely	5%	1%
Very Unlikely		2%

POST-TRIP EVALUATION

Satisfaction with Accommodations	July - Sept 2022	July - Sept 2023
Exceeded expectations	36%	41%
Met expectations	57%	51%
Did not meet expectations	7%	8%

Felt Welcomed in the Fort Myers Area	July - Sept 2022	July - Sept 2023
Yes	94%	94%

POST-TRIP EVALUATION

Satisfaction with Visit	July - Sept 2022	July - Sept 2023
Very satisfied	51%	56%
Satisfied	43%	38%
Neither	4%	3%
Dissatisfied	2%	2%
Very dissatisfied	0%	0%
Don't know/no opinion	0%	1%

Satisfaction with Customer Service	July - Sept 2022	July - Sept 2023
Very satisfied	49%	59%
Satisfied	42%	34%
Somewhat satisfied	5%	5%
Dissatisfied	3%	1%
Very dissatisfied	0%	0%
Don't know/no opinion	1%	1%

POST-TRIP EVALUATION

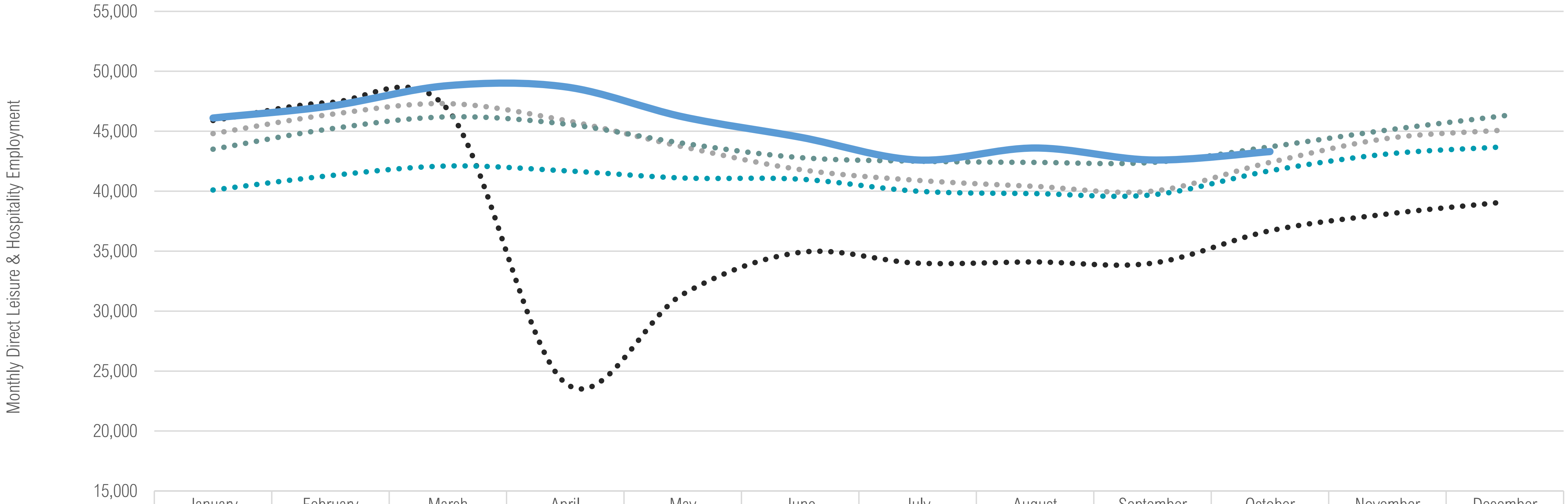
Visitor Concerns[1]	July - Sept 2022	July - Sept 2023
Damaged buildings, etc. from Ian	-	26%
Traffic	19%	23%
Insects	17%	18%
High Prices	30%	16%
Construction noise, activity, etc.	-	10%
Beach seaweed	13%	8%
Lack of nightlife	15%	8%
Weather	9%	8%
Red tide	4%	5%
Water quality	5%	5%
Quality of accommodations	7%	3%
Other	2%	4%
Nothing	26%	26%

[1]Multiple responses permitted.

Industry Data

LEISURE & HOSPITALTY EMPLOYMENT

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

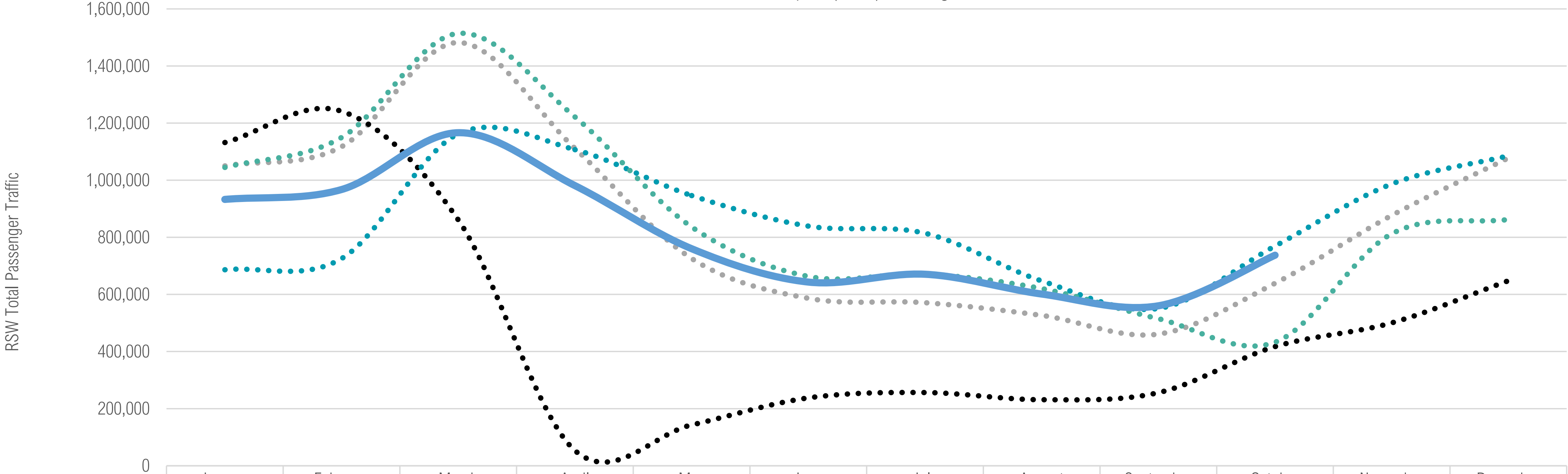


	January	February	March	April	May	June	July	August	September	October	November	December
2019	44,800	46,400	47,300	45,900	43,700	41,800	40,900	40,400	40,000	42,400	44,400	45,100
2020	45,900	47,400	46,800	24,000	31,400	34,900	34,000	34,100	34,000	36,700	38,100	39,100
2021	40,100	41,300	42,100	41,700	41,100	41,000	40,000	39,800	39,700	41,700	43,100	43,700
2022	43,500	45,200	46,200	45,600	44,000	42,800	42,500	42,400	42,400	43,700	45,100	46,300
2023	46,100	47,100	48,800	48,700	46,200	44,500	42,600	43,600	42,600	43,300 (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		

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

LICENSED TRANSIENT RENTAL UNITS

Licensed Transient Rental Units in Lee County, as of October 2023[1]					
	Hotel	Motel	Bed & Breakfast	Vacation Rental	Total
Fort Myers	5,191	1,450	9	668	7,318
Fort Myers Beach	715	550	6	1,957	3,228
Cape Coral	584	204	0	2,387	3,175
Sanibel	68	780	0	1,697	2,545
Bonita Springs	1,244	38	0	435	1,717
Captiva	107	166	0	333	606
Estero	566	0	0	26	592
North Fort Myers	0	325	0	69	394
Boca Grande	77	107	0	177	361
Lehigh Acres	75	0	0	175	250
Saint James City	0	20	0	63	83
Bokeelia	0	31	0	35	66
Matlacha	0	0	2	31	33
Cabbage Key	0	9	0	0	9
Iona	0	0	0	3	3
Pineland	0	0	0	1	1
Miromar Lakes	0	0	0	1	1
Alva	0	0	0	1	1
Total	**8,627**	**3,680**	**17**	**8,059**	**20,383[2]**

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

Methodology

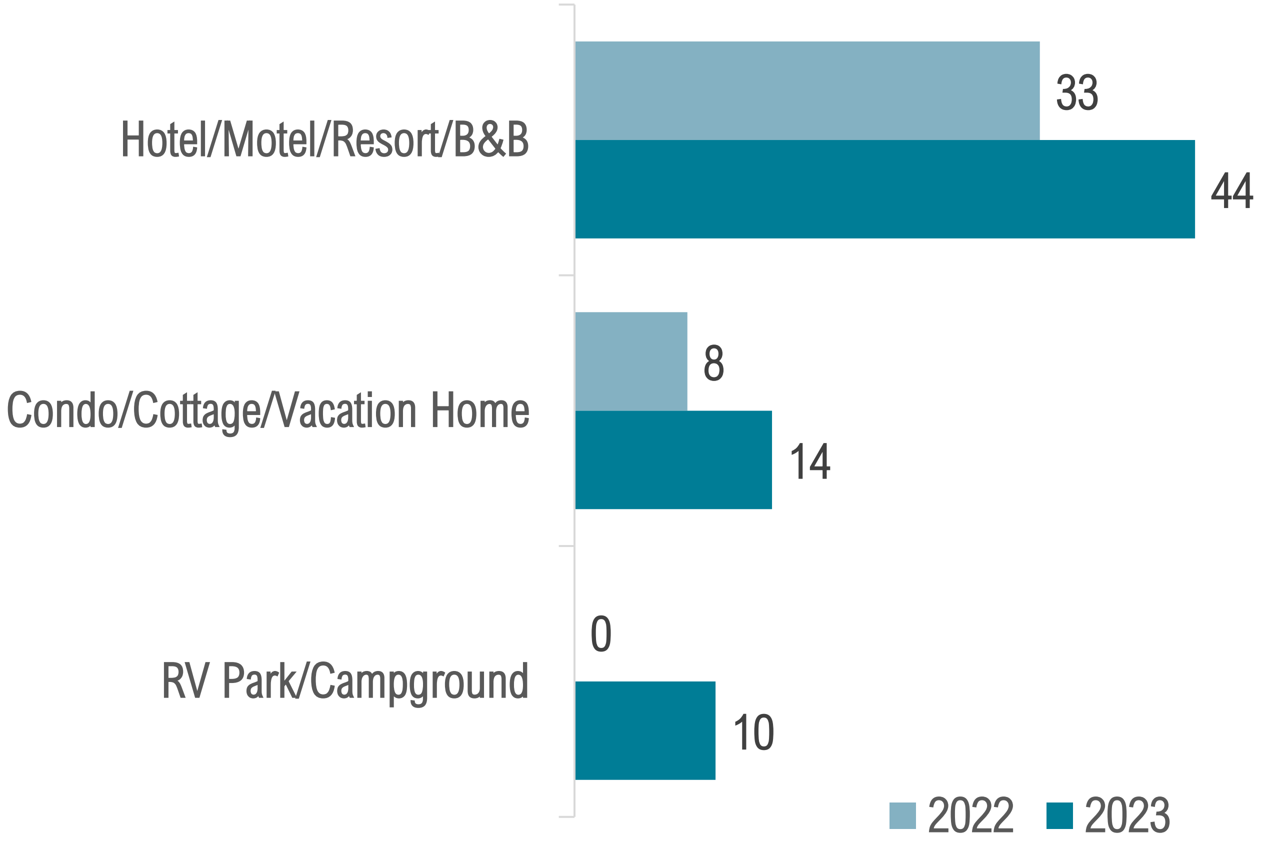
METHODOLOGY

- Economic Impact of tourism in Lee County is derived from:
  - Visitor Tracking Study
    - 900 surveys in public areas, hotels, at events around Lee County, and online
    - Target individuals: July - September visitors to Lee County
    - Data Collection: July - September 2023
  - 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 7,823 hotel/rental/campground units (68 properties) reporting to DSG, 8,745 hotel units reporting to STR (73 properties), and 3,108 rental units (27 properties) 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 – 68 completed surveys
    - Data Collection: Completed in October (for July - September 2023)
  - Total Sample Size – data from 7,823 hotel/rental/campground units reporting to DSG, 8,745 hotel units reporting to STR (representing 73 properties), and 3,108 rental units reporting to KeyData (representing 27 properties)

Number of Complete Responses



[1] Due to Hurricane Ian's landfall in late September of 2022, Occupancy Study sample sizes were much smaller than normal in October 2022, however, sample sizes have been steadily increasing since then as more properties continue to recover and reopen.

Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

July - Sept 2023

Visitor Tracking, Occupancy, & Economic Impact Study

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