Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

Oct - Dec 2023

Visitor Tracking, Occupancy & Economic Impact Study

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Introduction

STUDY OBJECTIVES: MAP THE VISITOR JOURNEY

Pre-Visit
- Planning cycle
- Planning sources
- Information requests
- Other destinations considered
- Trip influencers
- Reasons for visiting
- Exposure to promotions
- Booking
- Mode of transportation

Travel Party Profile
- Visitor origin
- Party size
- Party composition
- Demographics

Trip Experience
- Accommodations
- Length of stay
- Number of times in destination
- Activities in destination
- Attractions visited
- Area stayed

Post-Trip Evaluation
- Likelihood of recommending
- Likelihood of returning
- Satisfaction with overall stay & customer service
- Evaluation of destination attributes
- Visitor concerns
- Painting a picture for others

Economic Impact on Destination
- Number of visitors
- Expenditures
- Economic impact
- Room nights generated
- Occupancy, ADR, RevPAR
- Jobs, wages and taxes supported by tourism

Executive Summary

QUARTERLY SNAPSHOT
Oct - Dec 2023

→ **Visitation** was **up 65.8%** and **room nights** were **up 17.3%.**
  → The steep increase in visitation was due largely to a decreased length of stay and larger travel party size compared to Oct-Dec 2022.

→ The **proportion of visitors** who stayed in **paid accommodations** increased from **59%** in Oct-Dec 2022 to **69%** in Oct-Dec 2023.

→ **Direct Spending** was **up 26.2%** and **Economic Impact of Tourism** was **up 26.9%**, when compared to Oct-Dec 2022, which was the first quarter after the impact of Hurricane Ian.

→ The **proportion of international visitors** saw a slight **increase** compared to the same period last year, **representing** an **82% decrease** in the actual **number of international visitors to the area.**

55.2%	$154.89	$85.53
OCCUPANCY RATE	**AVERAGE DAILY RATE**	**REVENUE PER ROOM**
↑ 1.6% pts from 2022	↓ 7.9% from 2022	↓ 6.4% from 2022

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VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

TOURISM SNAPSHOT: KEY METRICS OCT-DEC 2022 VS. 2023

Visitor & Lodging Statistics	Oct - Dec 2022[3]	Oct - Dec 2023	% Change '22-'23
Visitors	486,300	806,000	+ 65.8%
Visitor Days	3,794,500	4,715,100	+ 24.3%
Room Nights	866,600	1,016,400	+ 17.3%
Direct Expenditures[1]	$521,691,700	$658,633,800	+ 26.2%
Total Economic Impact[2]	$831,054,900	$1,054,472,700	+ 26.9%

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

TOURISM SNAPSHOT: KEY METRICS OCT-DEC 2021 VS. 2023

Visitor & Lodging Statistics	Oct - Dec 2021[3]	Oct - Dec 2023	% Change '21-'23
Visitors	1,170,100	806,000	-31.1%
Visitor Days	6,640,300	4,715,100	-29.0%
Room Nights	1,399,500	1,016,400	-27.4%
Direct Expenditures[1]	$883,568,900	$658,633,800	-25.5%
Total Economic Impact[2]	$1,408,408,800	$1,054,472,700	-25.1%

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

TOURISM SNAPSHOT: KEY METRICS YEAR TO DATE

Visitor & Lodging Statistics	CYTD 2022[3]	CYTD 2023[3]	% Change '22-'23
Visitors	4,203,900	2,976,200	-29.2%
Visitor Days	26,246,300	19,389,900	-26.1%
Room Nights	5,866,700	4,315,100	-26.4%
Direct Expenditures[1]	$3,951,070,900	$2,894,033,400	-26.8%
Total Economic Impact[2]	$6,294,056,000	$4,633,347,500	-26.4%

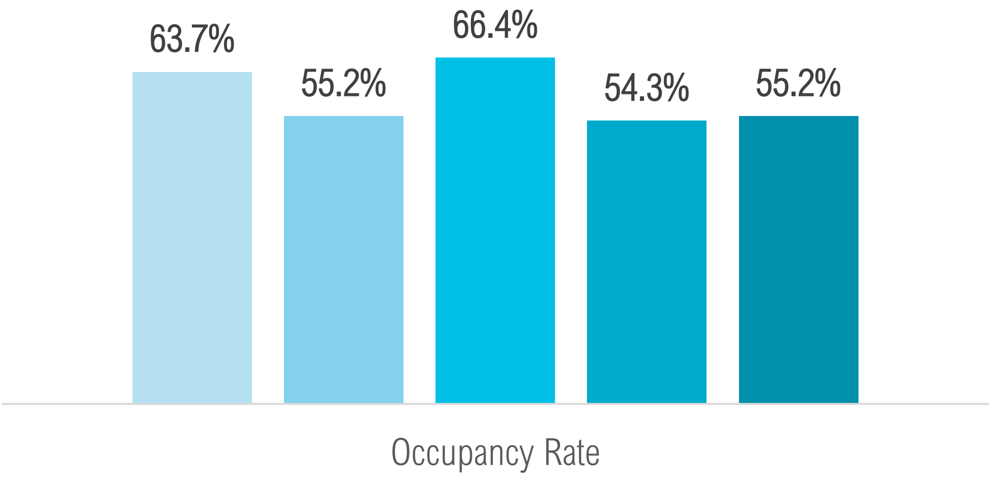
[1] Includes: accommodations, restaurants, entertainment, shopping, transportation, groceries, and "other" expenses.
[2] Economic impact includes indirect and induced effects of visitor spending. Indirect effects are increased business spending resulting from tourism dollars. Induced effects are increased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

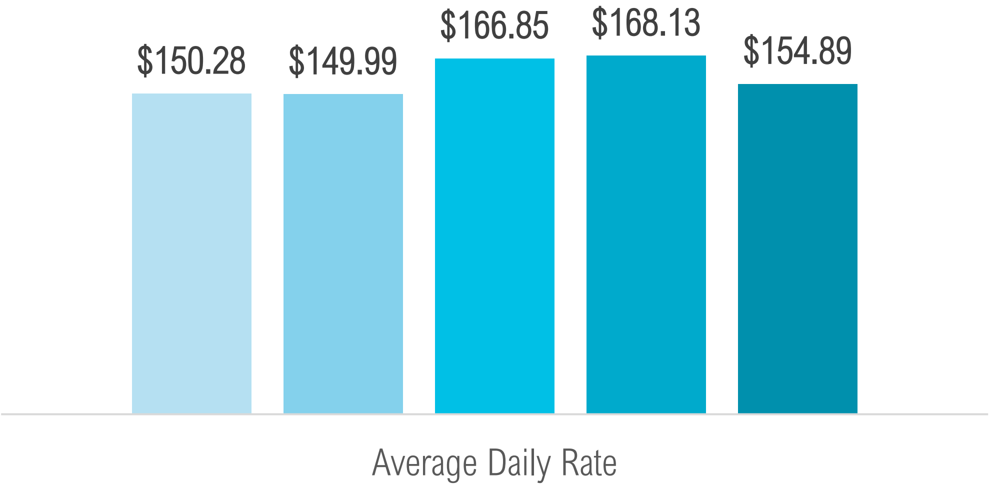
OCT-DEC LODGING STATISTICS[1]

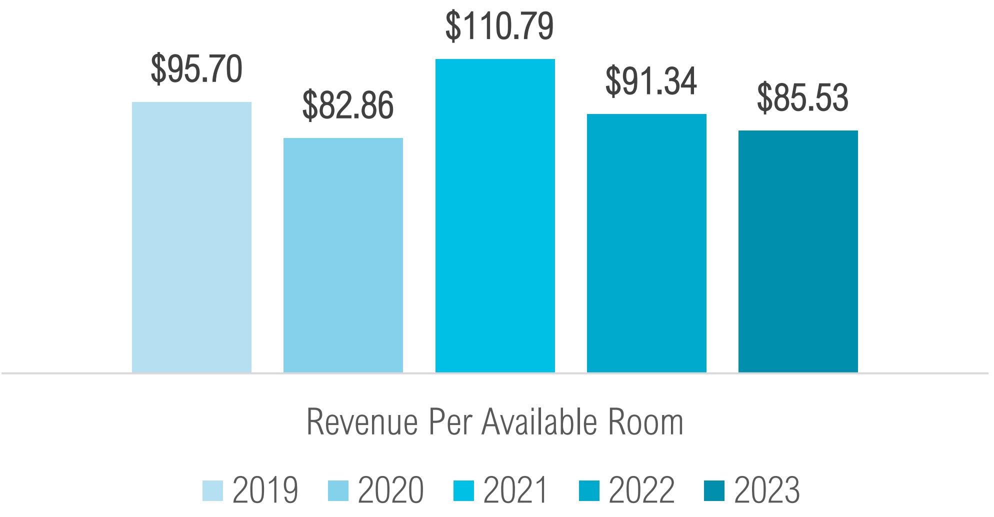
55.2%	$154.89	$85.53
Occupancy	ADR	RevPAR
↑ 1.6% pts	↓ 7.9%	↓ 6.4%
From 2022	From 2022	From 2022

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

OCT-DEC 2019-2023 OVERALL LODGING METRICS[1,2]

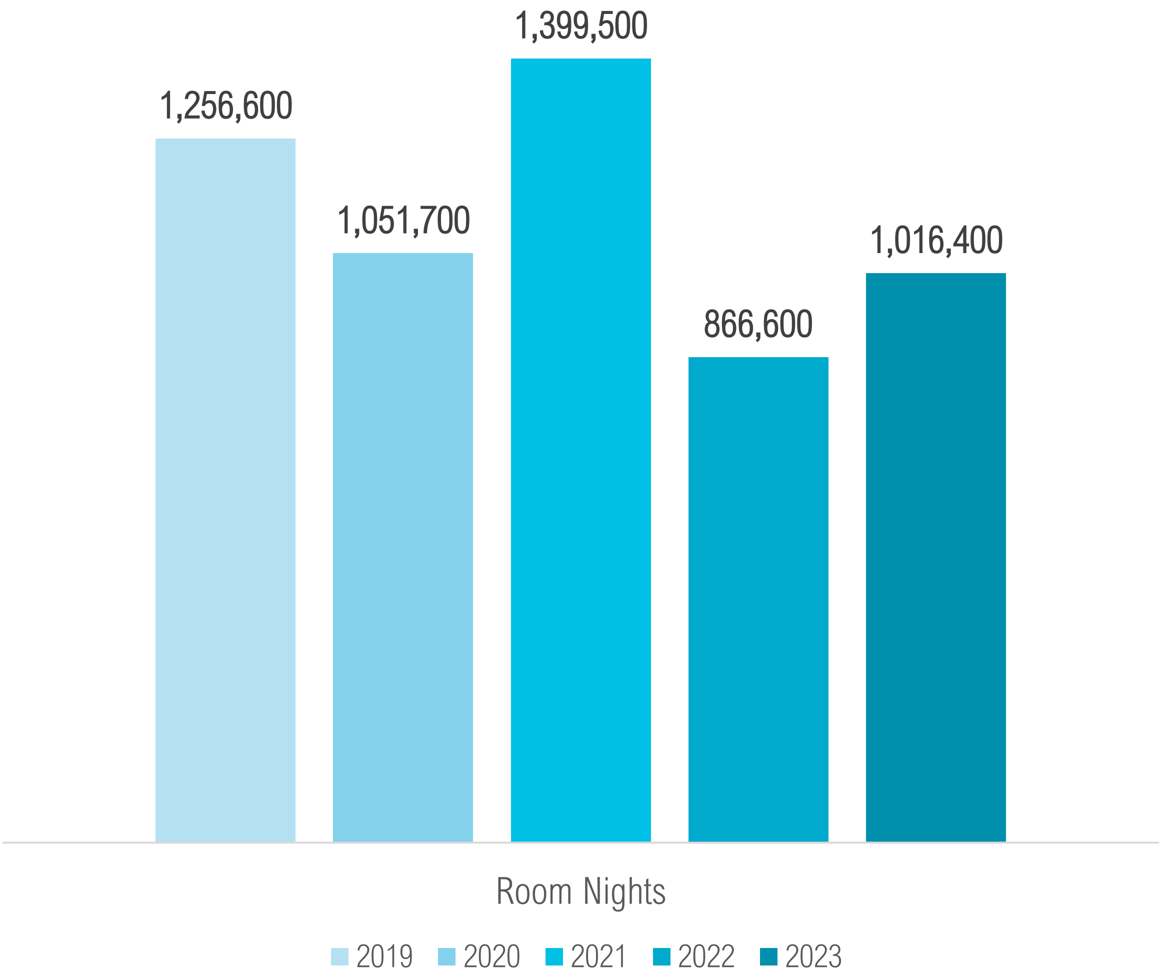






[1] Sources: STR, KeyData, & DSG Occupancy Study
[2] 2019-2022 data has been revised to reflect updated unit figures for RV Parks & Campgrounds as determined in a recent survey of Lee County RV Parks & Campgrounds conducted by DSG Research.

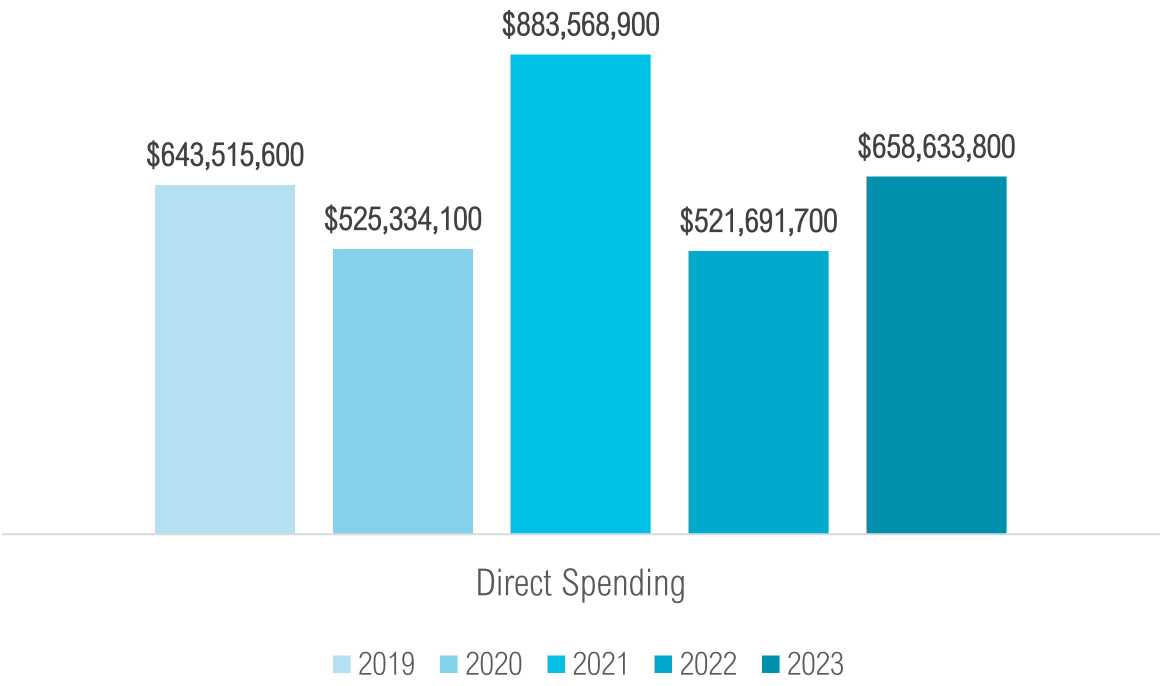
OCT-DEC 2019-2023 VISITATION & ROOM NIGHTS[1,2]

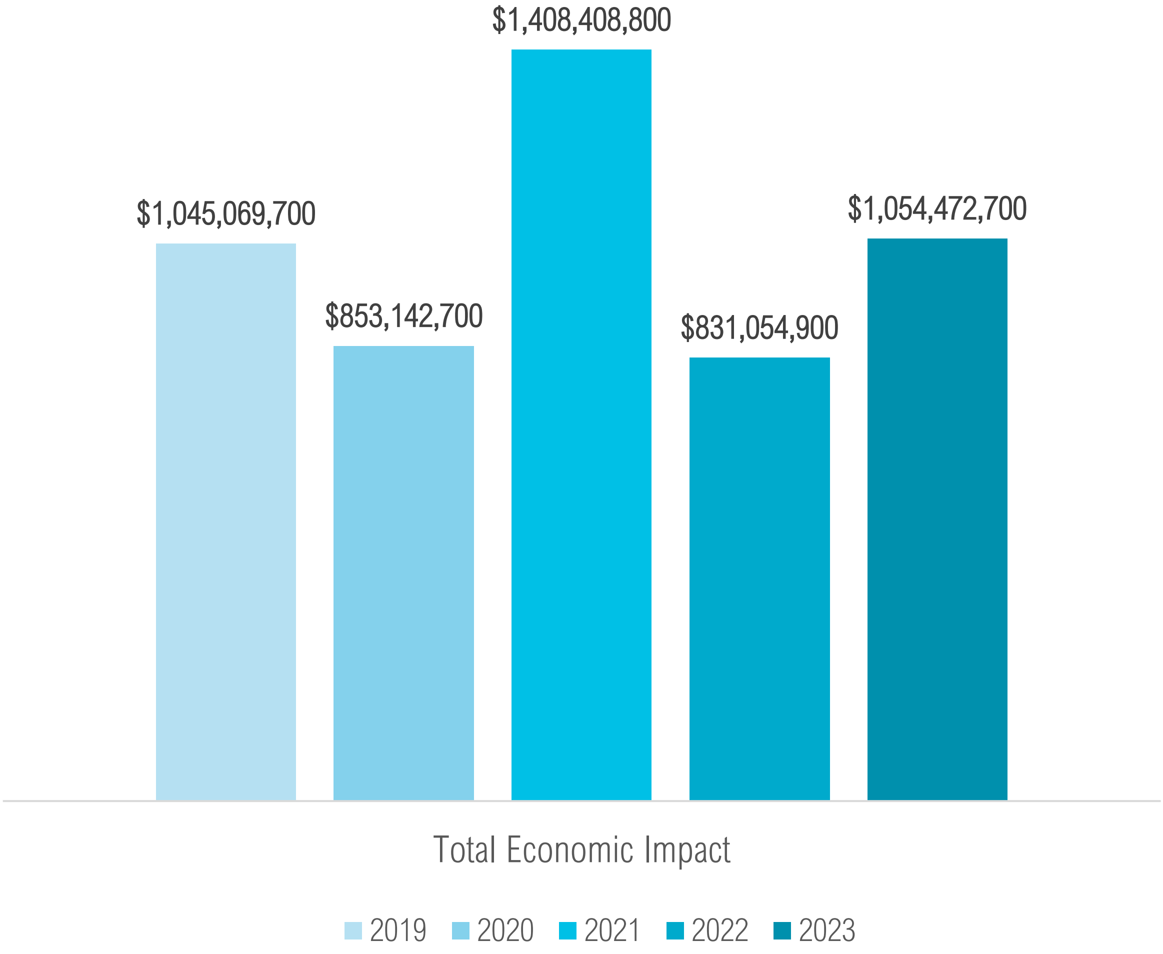


[1] Sources: STR, KeyData, & DSG Occupancy Study

[2] 2019-2022 data has been revised to reflect updated unit figures for RV Parks & Campgrounds as determined in a recent survey of Lee County RV Parks & Campgrounds conducted by DSG Research.

OCT-DEC 2019-2023 SPENDING & ECONOMIC IMPACT[1,2]





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

[2] 2019-2022 data has been revised to reflect updated unit figures for RV Parks & Campgrounds as determined in a recent survey of Lee County RV Parks & Campgrounds conducted by DSG Research.

VISITOR JOURNEY: PRE-VISIT

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

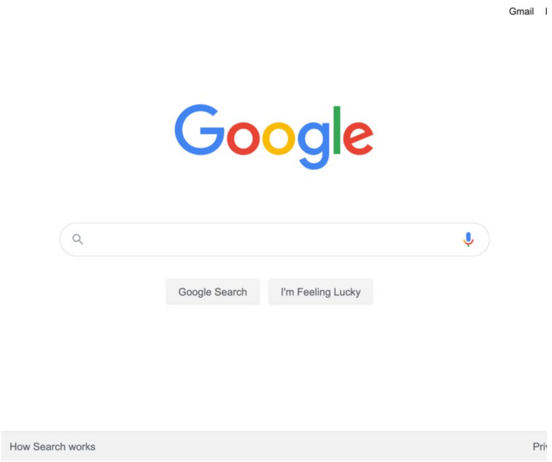
TRIP PLANNING

- Nearly half of visitors planned their trips to the Fort Myers area 3 months or more in advance
- The average trip planning cycle lasted nearly 3 months
- Nearly 1 in 3 visitors requested information to plan their trips
  - Nearly 1 in 4 visitors called a hotel, motel, or condo
  - Nearly 1 in 10 visitors requested a visitor guide
- 27% of visitors considered choosing other destinations when planning their trips

TRIP PLANNING: WEBSITES/APPS USED

- Nearly 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]:

32% Airline Websites/Apps



25% Search Engines

airbnb

17% Airbnb, VRBO, HomeAway, or similar websites

17% Hotel websites/apps

[1]Multiple responses permitted.

TOP TRIP INFLUENCES

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

87% Warm weather

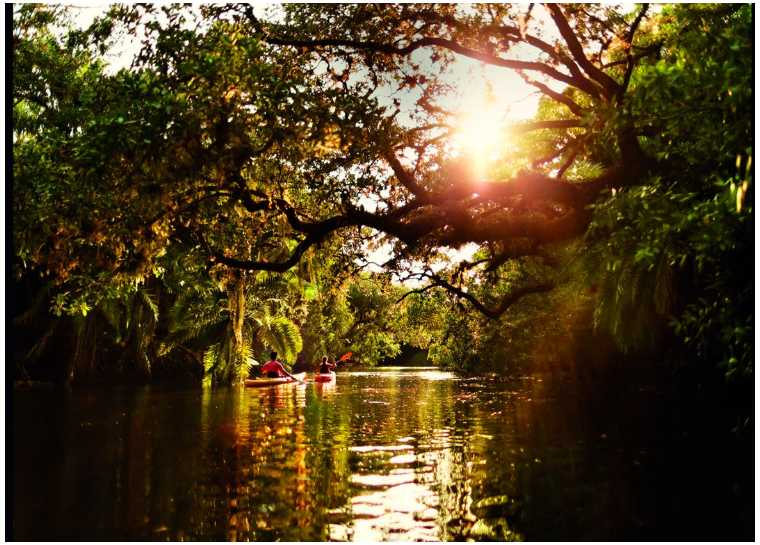
86% Peaceful/relaxing

83% A safe destination

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

TOP REASONS FOR VISITING

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



38% Relax & Unwind

31% Visiting Friends & Relatives

27% Beach

[1]Three responses permitted.

PROMOTION RECALL

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

48% Internet

32% Social media

16% Traveler reviews, blogs

13% Television

[1]Multiple responses permitted.

BOOKING

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

47% Directly with hotel/condo

17% Online travel agency

14% Airbnb

13% VRBO, HomeAway

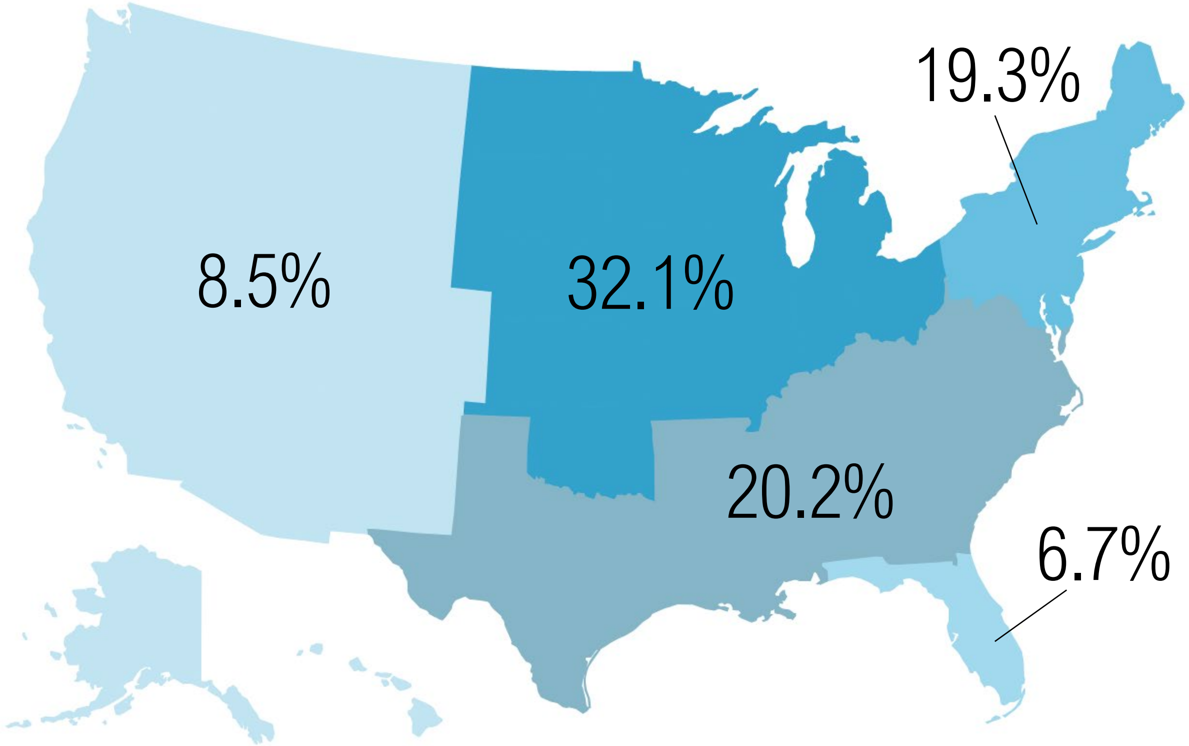
6% Vacation rental company

TRANSPORTATION

- 69% of visitors flew to the Fort Myers area
- 58% of all visitors traveled to the Fort Myers area via RSW

VISITOR JOURNEY: TRAVEL PARTY PROFILE

ORIGIN REGION[1]



US = 86.8%

Canada – 6.4%

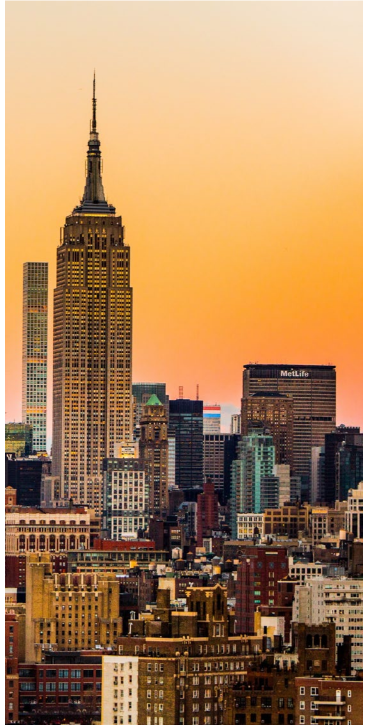
Germany – 3.6%

3.2% Other International Markets

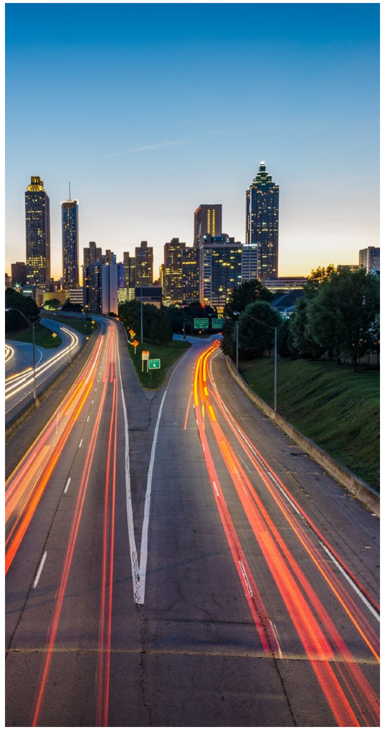
(United Kingdom, Other Europe, etc.)

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

TOP ORIGIN MARKETS[1]



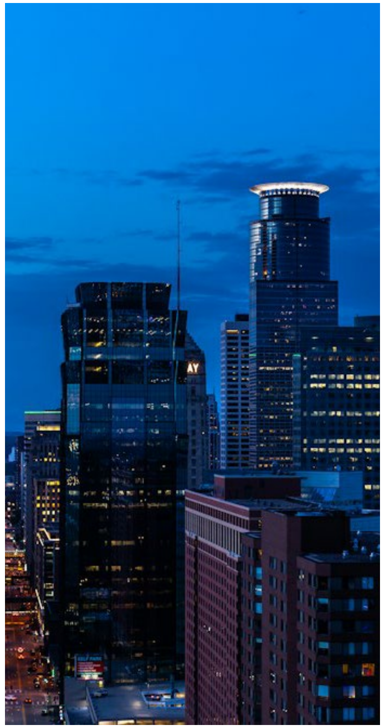
5% New York



4% Atlanta

4% Chicago

3% Detroit



3% Minneapolis – Saint Paul

3% Philadelphia

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

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TRAVEL PARTY SIZE AND COMPOSITION

- Visitors traveled in a party composed of 2.9 people[1]
- 32% traveled with children
- Over 1 in 3 visitors traveled either as a family or as a couple

[1]Sources: Occupancy Study and Visitor Tracking Study

DEMOGRAPHIC PROFILE[1]

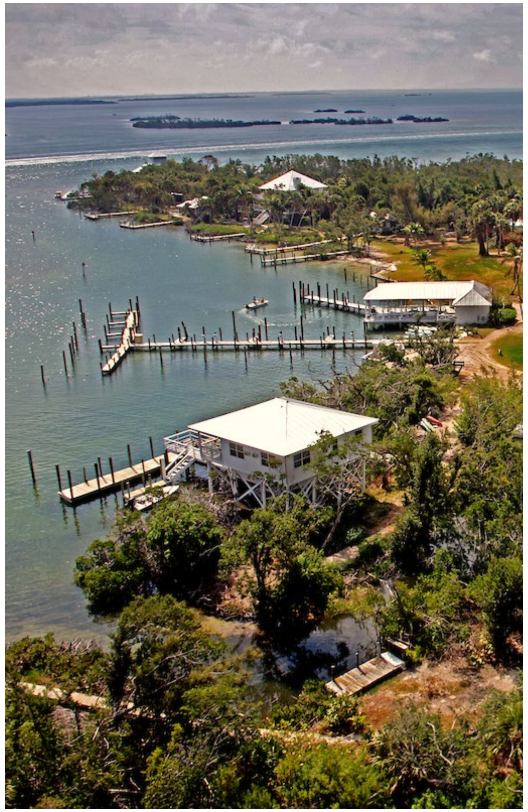
Oct - Dec Visitors:

- Median age of 50 years old
- Median household income of $103,300
- Married (75%)
- College educated (66%)
- Caucasian/white (74%)

Visitor Journey: Trip Experience

TOP ACCOMMODATIONS

39% Hotel/Motel/Resort



27% Condo/Vacation Rental

15% Personal second home, etc.

14% Staying with friends/relatives

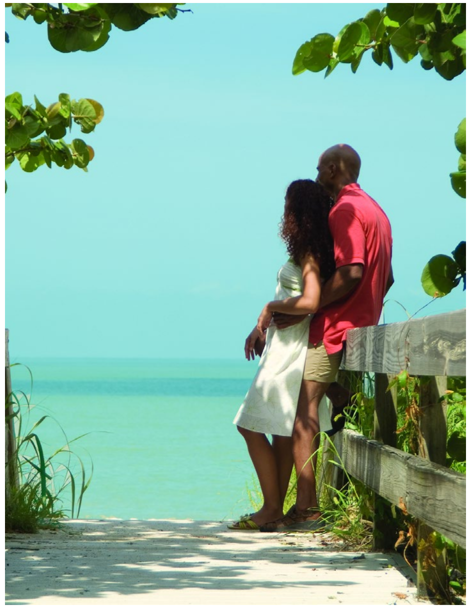
LENGTH OF STAY & NUMBER OF TIMES IN DESTINATION

- Visitors[1] spent an average of **5.9 nights** in the Fort Myers area
- **27%** were **first time** visitors
- **24%** have visited **more than 10 times**

[1]Sources: Occupancy Study and Visitor Tracking Study

VISITOR ACTIVITIES

- Top visitor activities include[1]:



61% Relaxing & unwinding

60% Dining out

50% Beach

43% Visit friends/relatives

41% Shopping

[1]Multiple responses permitted.

TOP ATTRACTIONS VISITED[1]

49% Beaches

23% Bell Tower Shops

21% Miromar Outlets

19% Edison & Ford Estates

19% Gulf Coast Town Center

[1]Multiple responses permitted.

TOP COMMUNITIES STAYED

39% Fort Myers

14% Cape Coral

12% Fort Myers Beach

VISITOR JOURNEY: POST-TRIP EVALUATION

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

SATISFACTION

- 90% of visitors are likely to recommend the area
  - 44% are very likely to recommend
- 85% of visitors are likely to return
  - 51% are very likely to return
- 68% of visitors are likely to return next year
  - 48% are very likely to return next year

SATISFACTION

- 94% of visitors were satisfied or very satisfied with their overall visit to the Fort Myers area (56% were very satisfied)
- 92% of visitors were satisfied or very satisfied with customer service on their visit (59% were very satisfied)
- 95% of visitors said paid accommodations at least met their expectations (39% said they exceeded expectations)

TOP ATTRIBUTE RATINGS

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

93% 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.

VISITOR CONCERNS[1]

- Nearly 3 in 10 visitors mentioned traffic as their least favorite part of their visit
- Nearly 1 in 5 visitors mentioned high prices, while roughly 1 in 8 visitors either mentioned damaged buildings or bugs/insects.
- Nearly 1 in 4 visitors said there was nothing they disliked about the area during their visit.

AREA DESCRIPTIONS

Warm Weather

"Spending my time here volunteering and I love the area. There's warm weather, cool nights, tons of good restaurants, and great sunsets to watch on the beach."

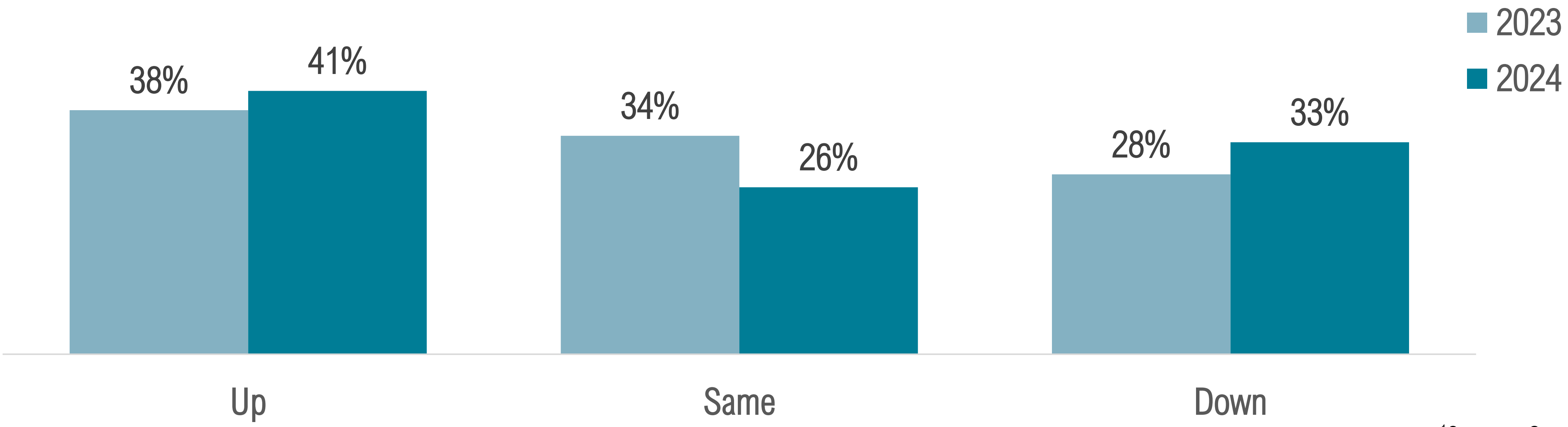
Peaceful/relaxing

"We're having a fabulous time. The area has a beautiful environment, and we have spent tons of time relaxing in the sunshine and even did a little fishing."

Safe Destination

"I've been coming here for years and have even convinced some of my friends to come try it out and eventually buy here too. Reasonably safe, family friendly, close to the beach, etc."

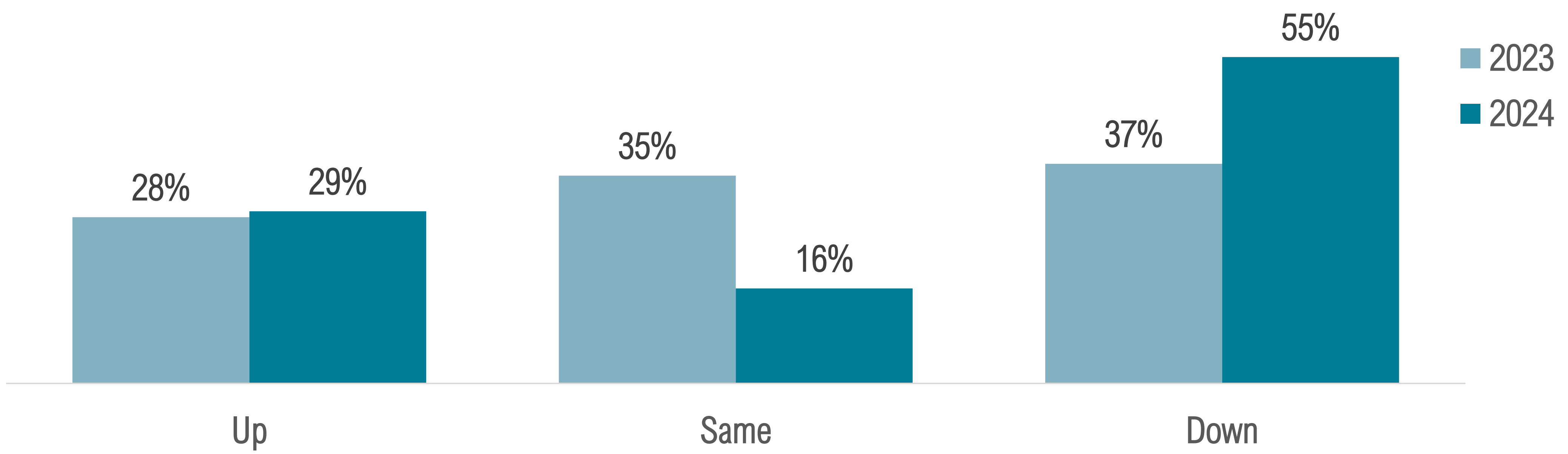
OCCUPANCY BAROMETER[1]: JAN - MAR RESERVATIONS



[1]Sources: Occupancy Survey

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

OCCUPANCY BAROMETER[1]: APR - JUN RESERVATIONS



[1]Sources: Occupancy Survey

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

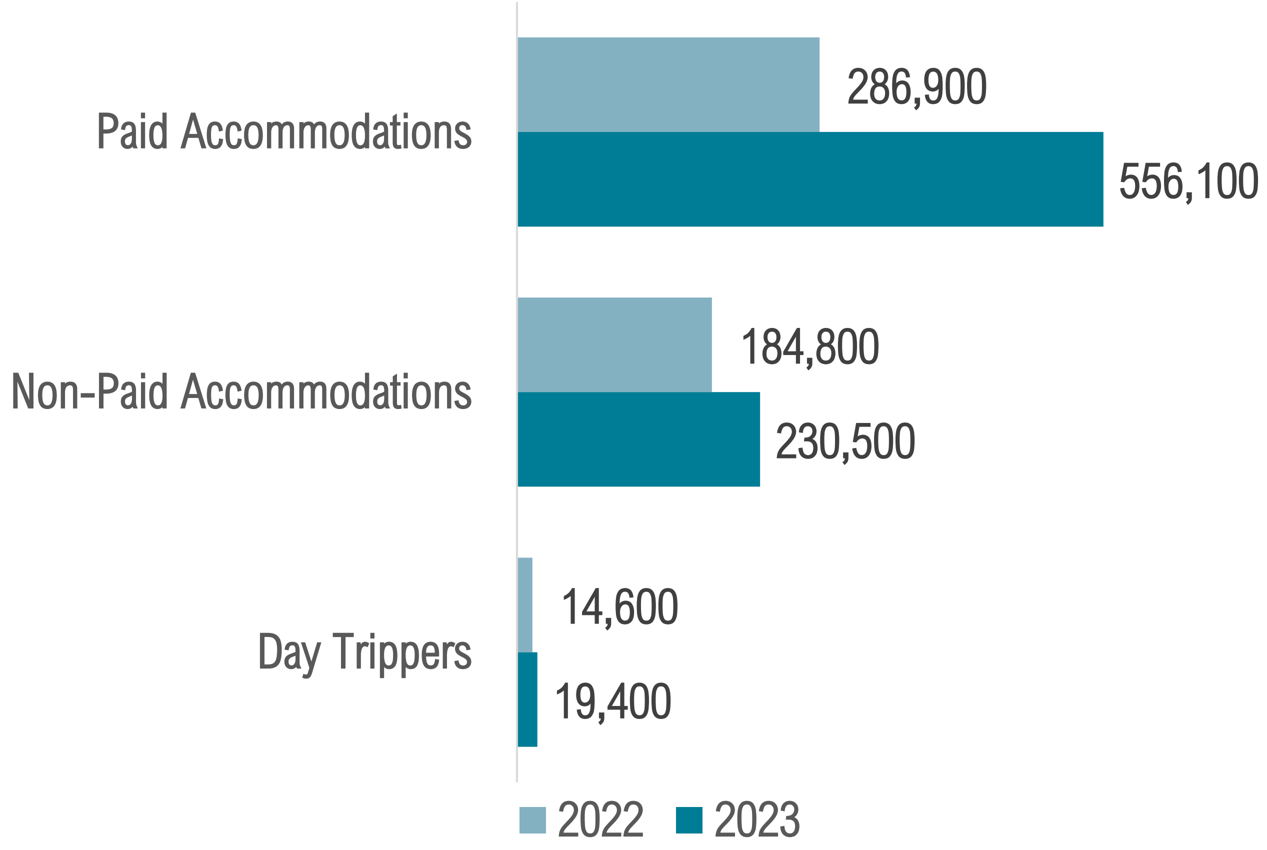
Detailed Findings

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

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

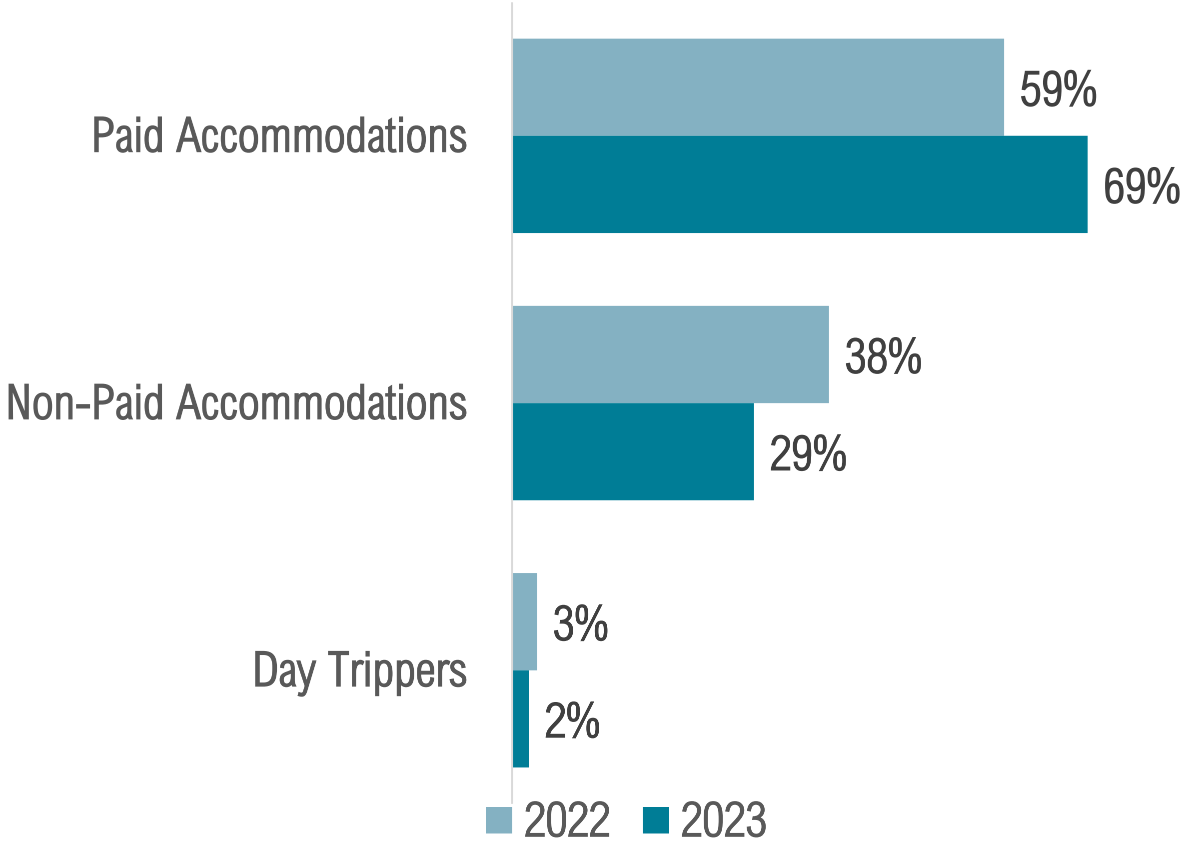
NUMBER OF VISITORS

There were 806,000[1] visitors to the Fort Myers area in Oct - Dec 2023 (+65.8% from 2022).



VISITOR TYPE

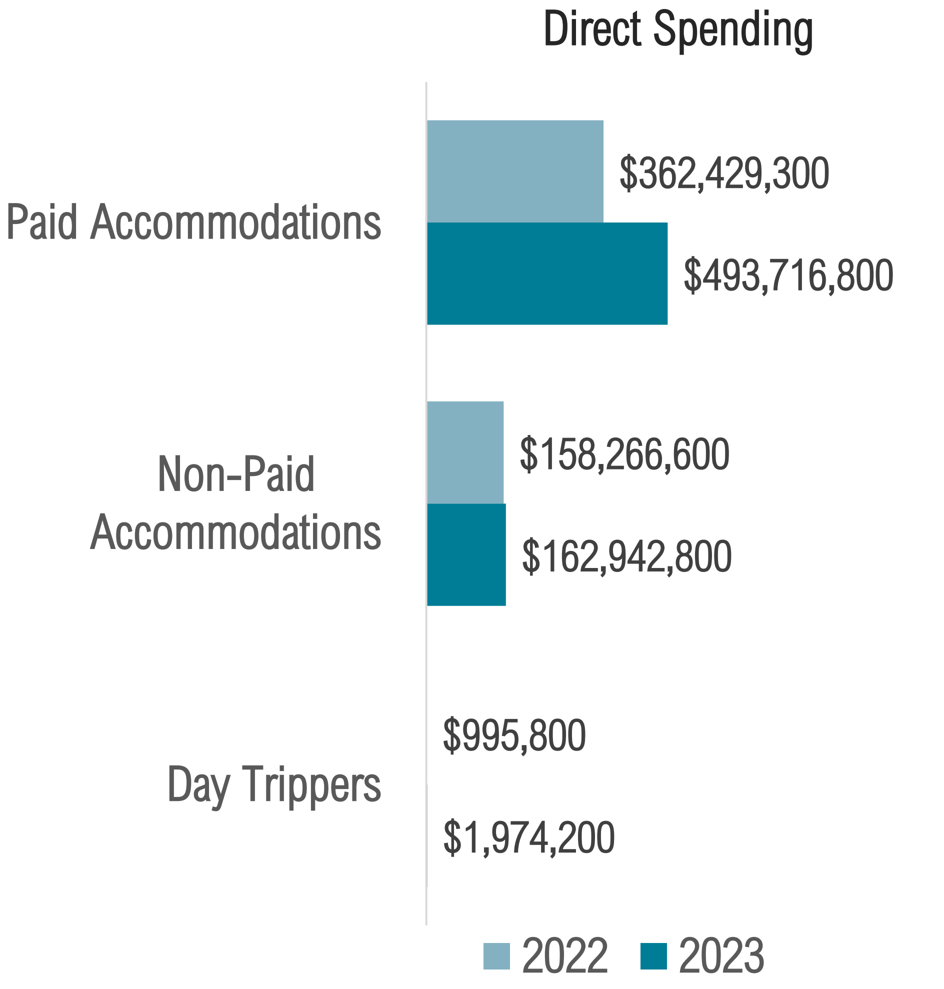
Visitors staying in paid accommodations accounted for over 2 in 3 visitors.



VISITOR EXPENDITURES BY VISITOR TYPE

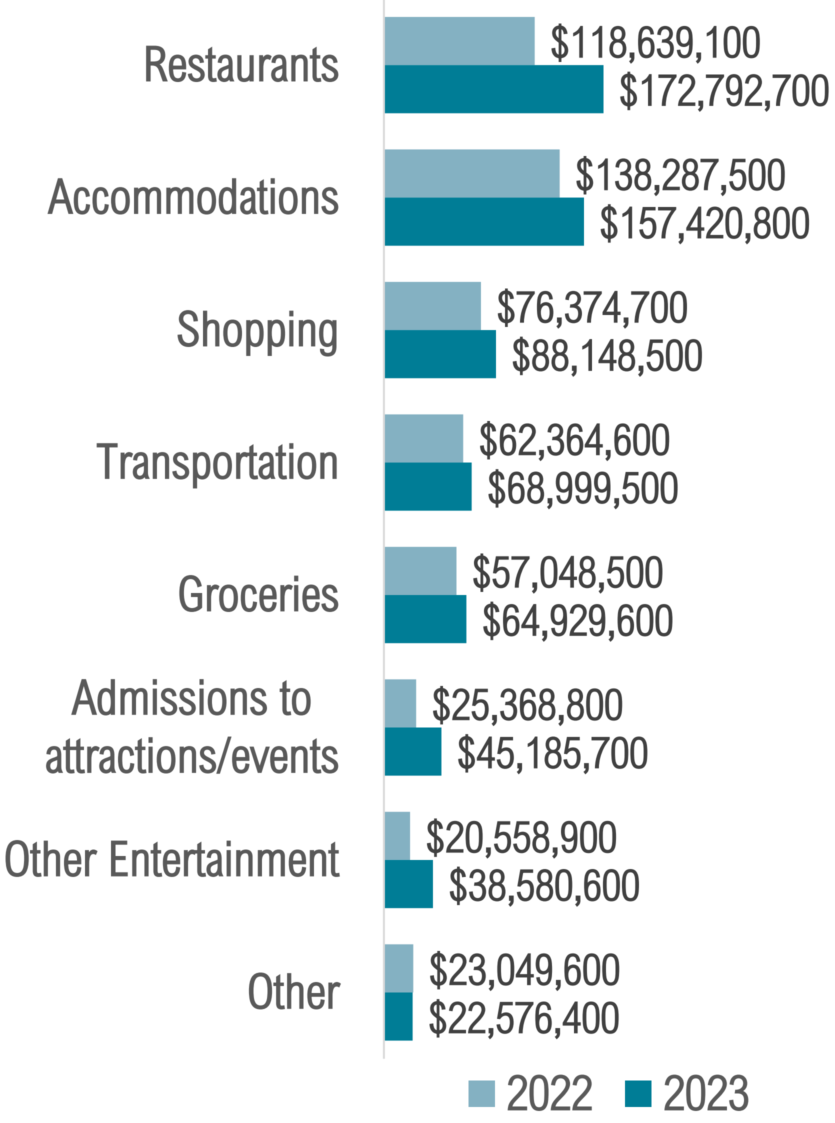
Oct - Dec visitors spent $658,633,800 in the Fort Myers area, resulting in a total economic impact of $1,054,472,700, up 26.9% from 2022.

Visitors staying in paid accommodations accounted for 69% of all visitors and 75% of all spending.



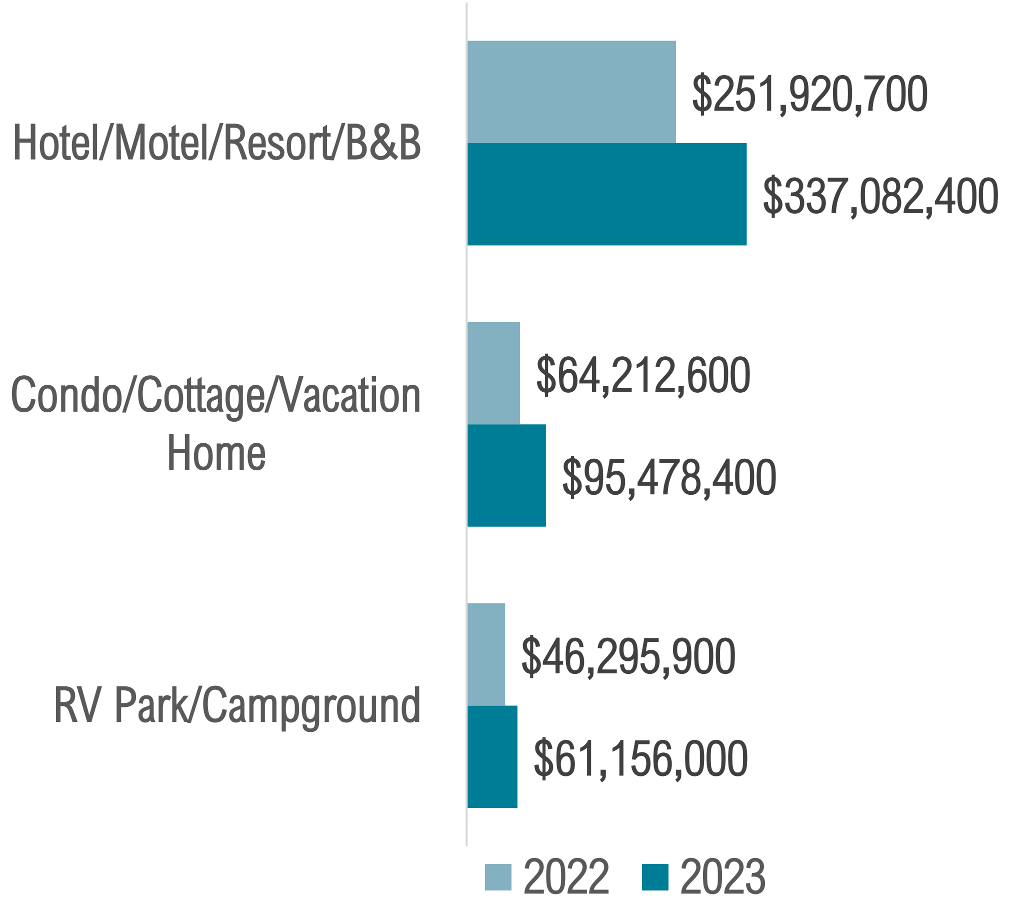
VISITOR EXPENDITURES BY SPENDING CATEGORY

Of the **$658,633,800** visitors spent in the Fort Myers area, 26% was spent on **restaurants** and 24% was spent on **accommodations**, accounting for **half of all visitor spending**.



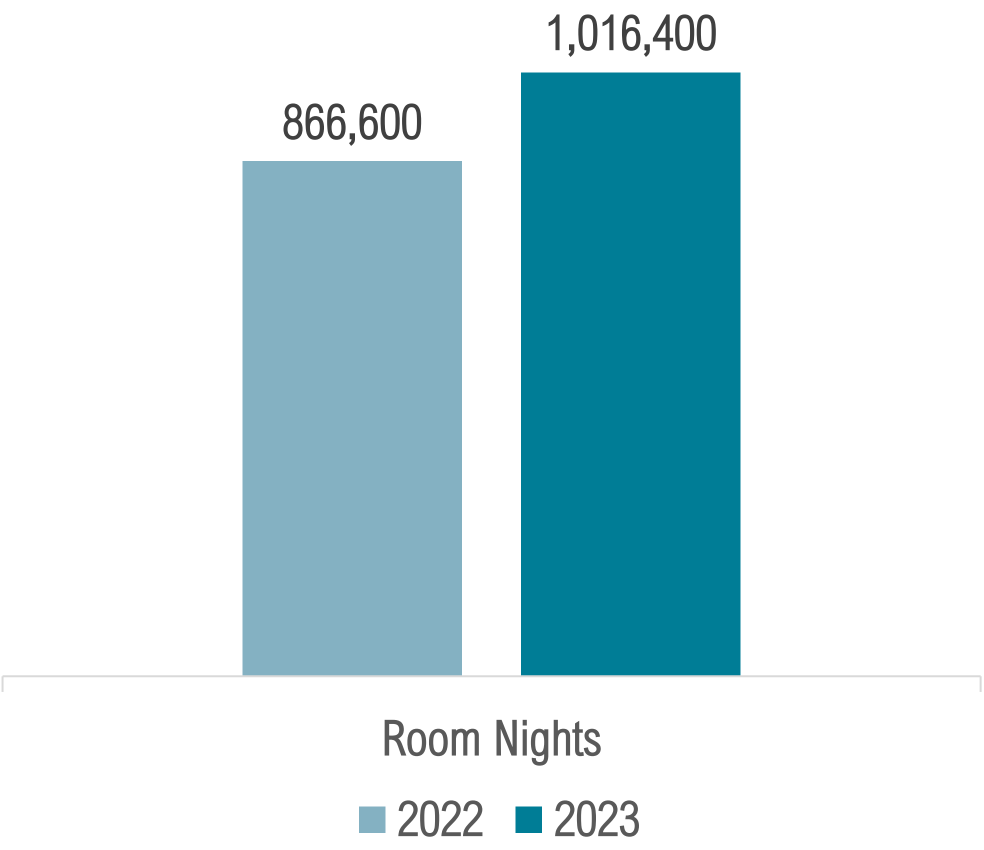
VISITOR EXPENDITURES BY LODGING TYPE

Oct - Dec visitors staying in paid accommodations spent $493,716,800 in the Fort Myers area.



ROOM NIGHTS GENERATED

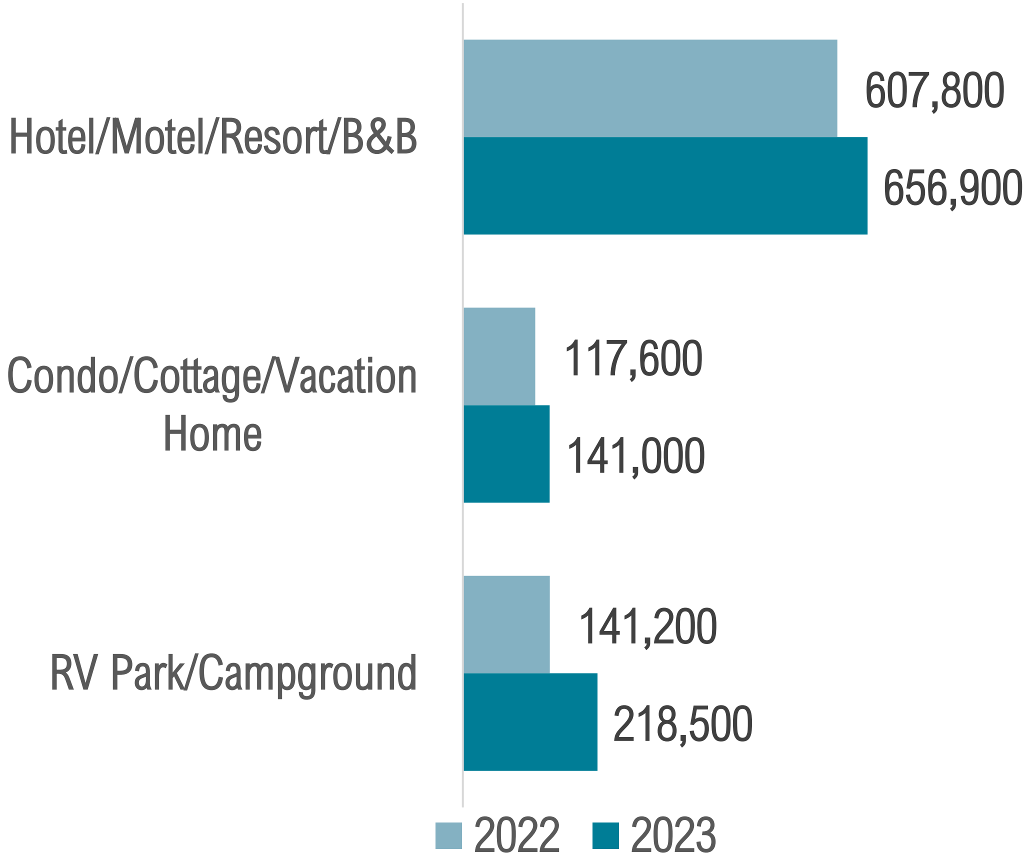
Oct - Dec visitors spent **1,016,400**[1] nights in Fort Myers area hotels, resorts, condos, rental houses, RV parks, etc. (+17.3% from 2022).



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

ROOM NIGHTS GENERATED

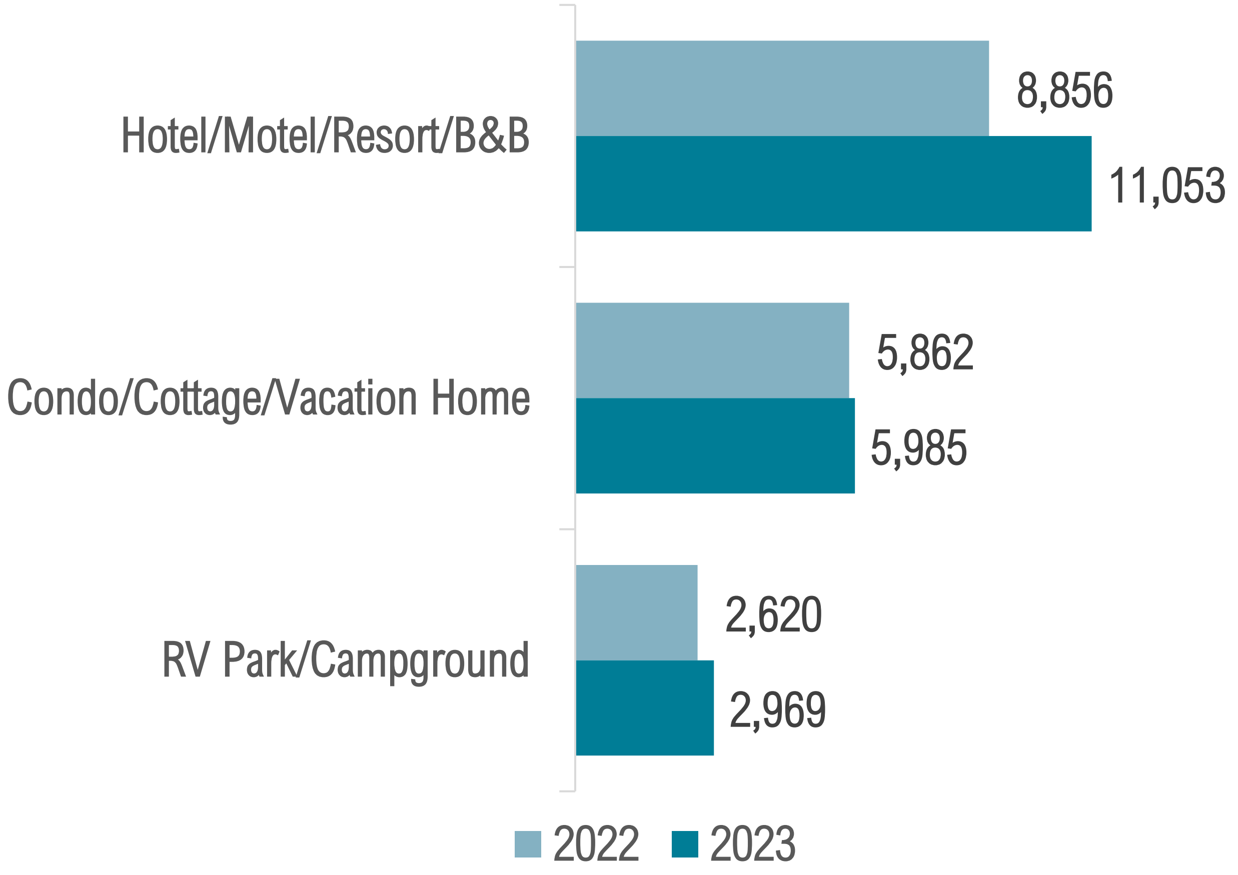
Hotels, motels, etc. accounted for **nearly 2 in 3** room nights spent in the Fort Myers area, while RV parks/campgrounds accounted for **over 1 in 5** room nights and vacation rentals accounted for the remaining **14%** of nights that visitors spent in the area.



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

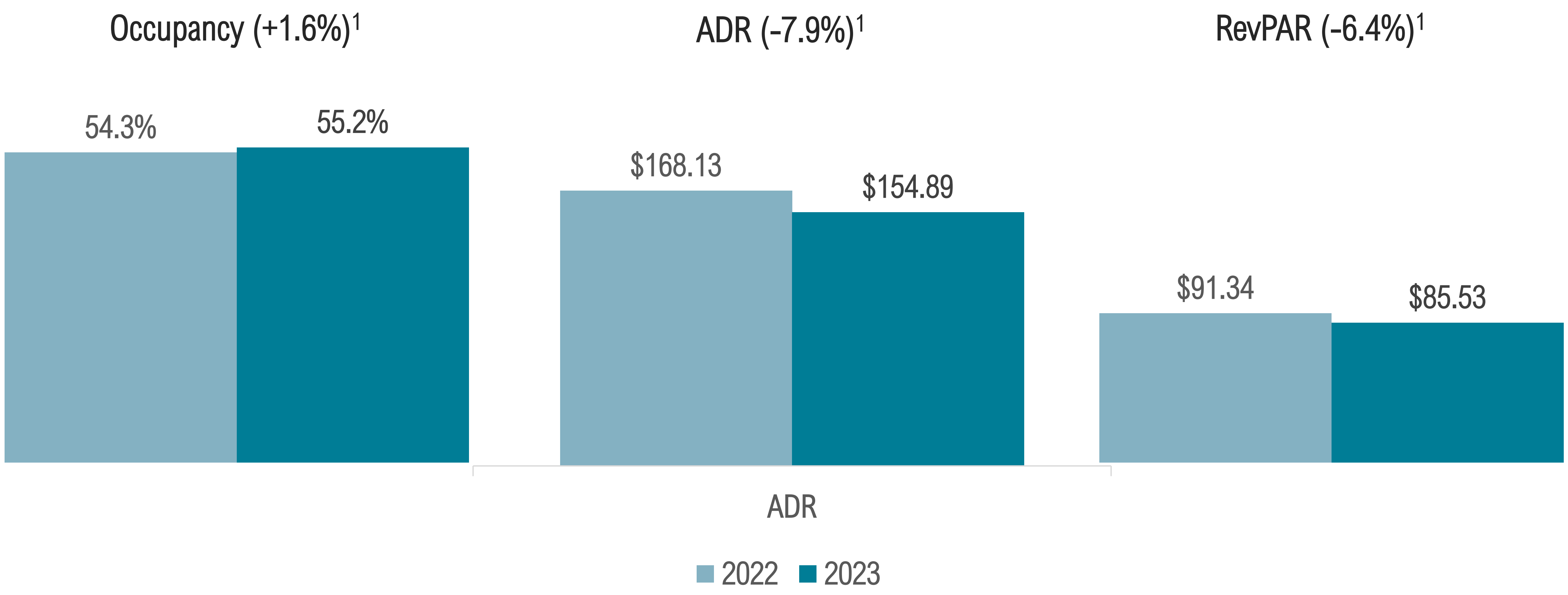
AVAILABLE UNITS

There were 20,007[1] available units in Oct - Dec 2023 vs. 17,338 in 2022 (+15.4%). Over half of the units available were from hotels, motels, etc.



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

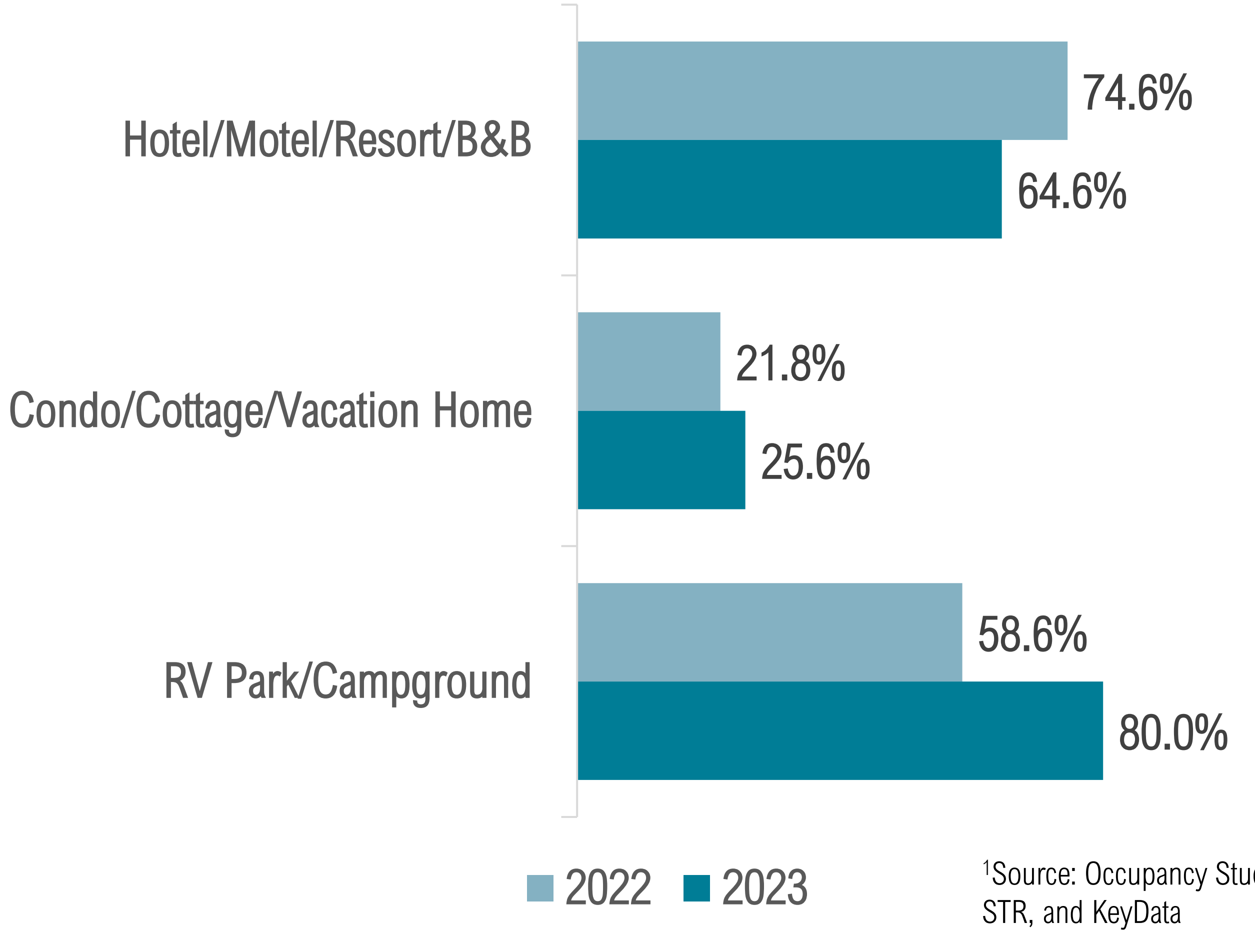
OCCUPANCY, ADR AND REVPAR



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

OCCUPANCY

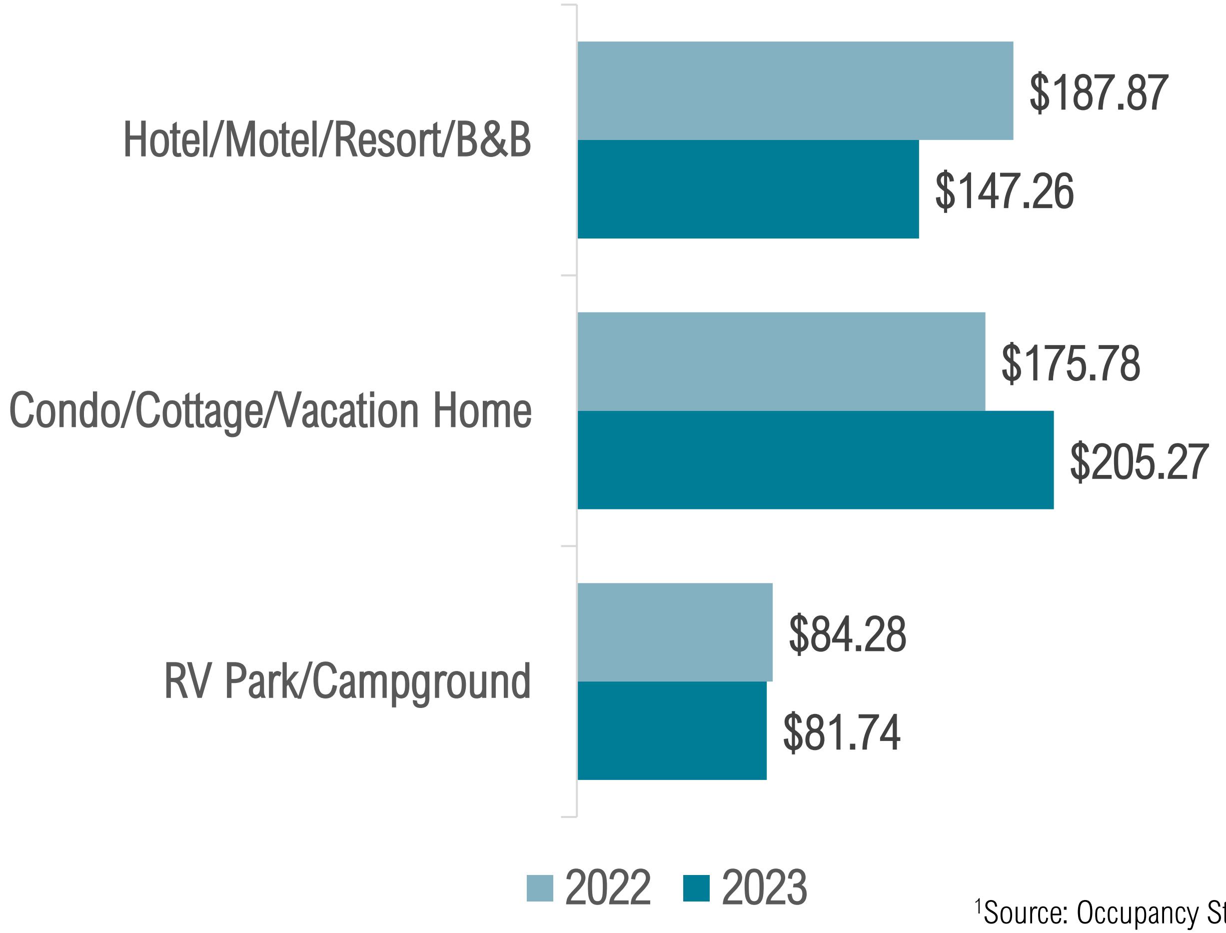
Average occupancy in Oct - Dec was 55.2%[1] (54.3% in 2022).



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

ADR

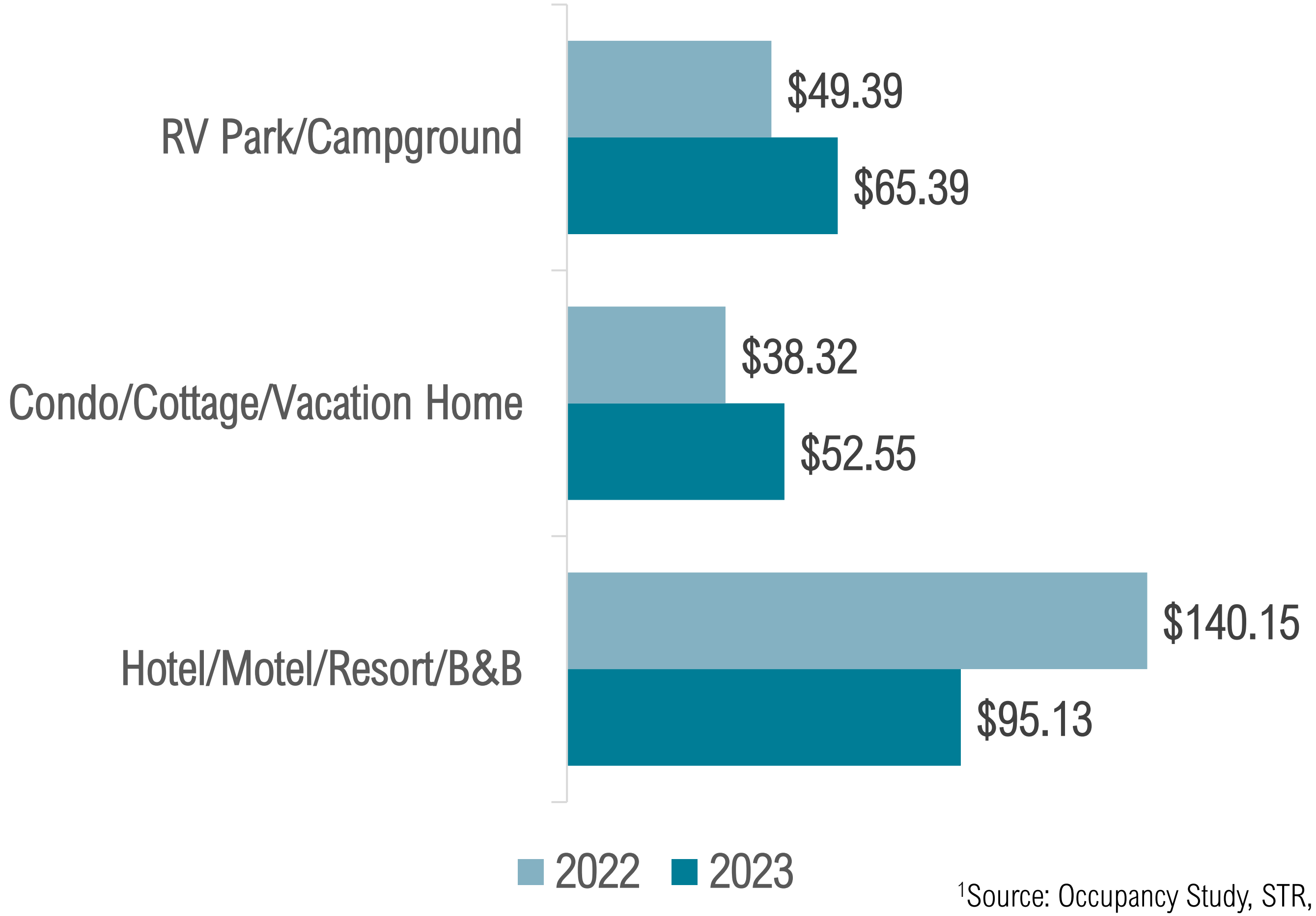
ADR in July – Sept was **$154.89**[1] ($168.13 in 2022).



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

REVPAR

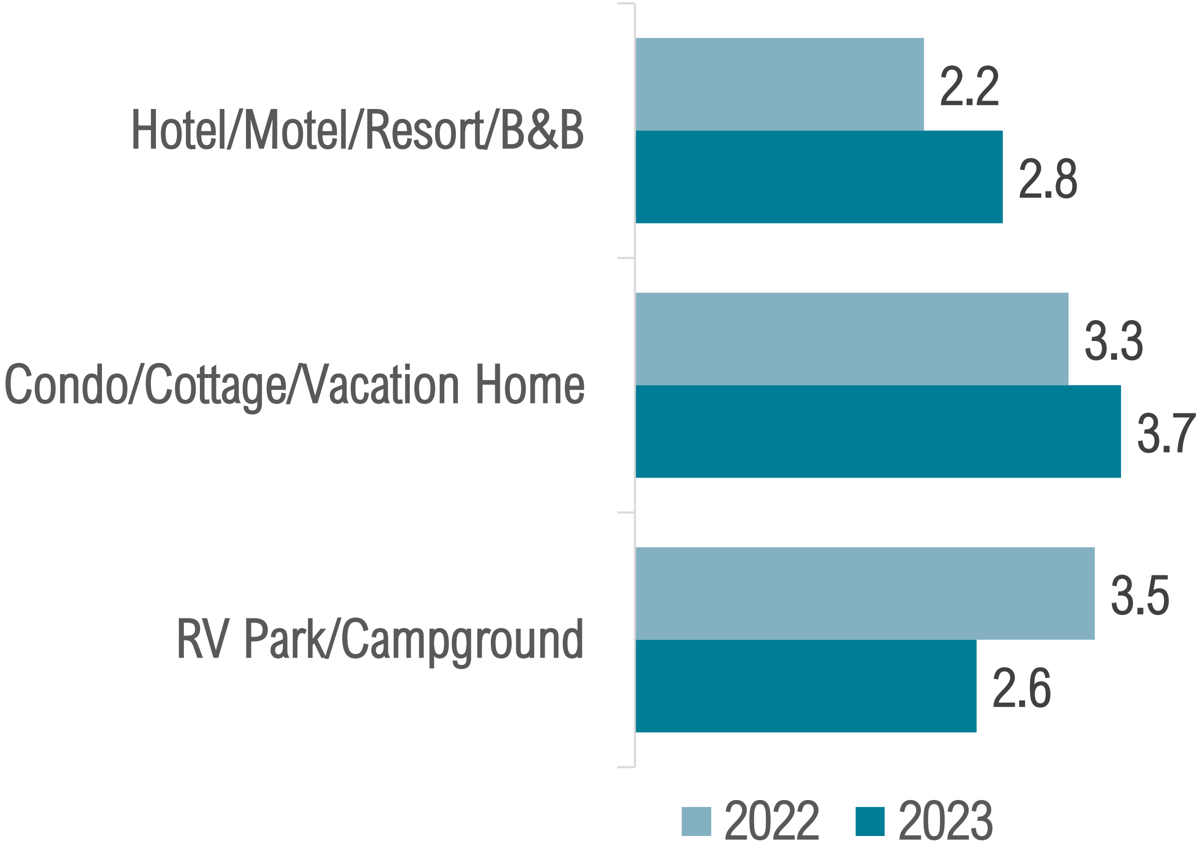
Average RevPAR in Oct - Dec was **$85.53**[1] ($91.34 in 2022).



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

TRAVEL PARTY SIZE

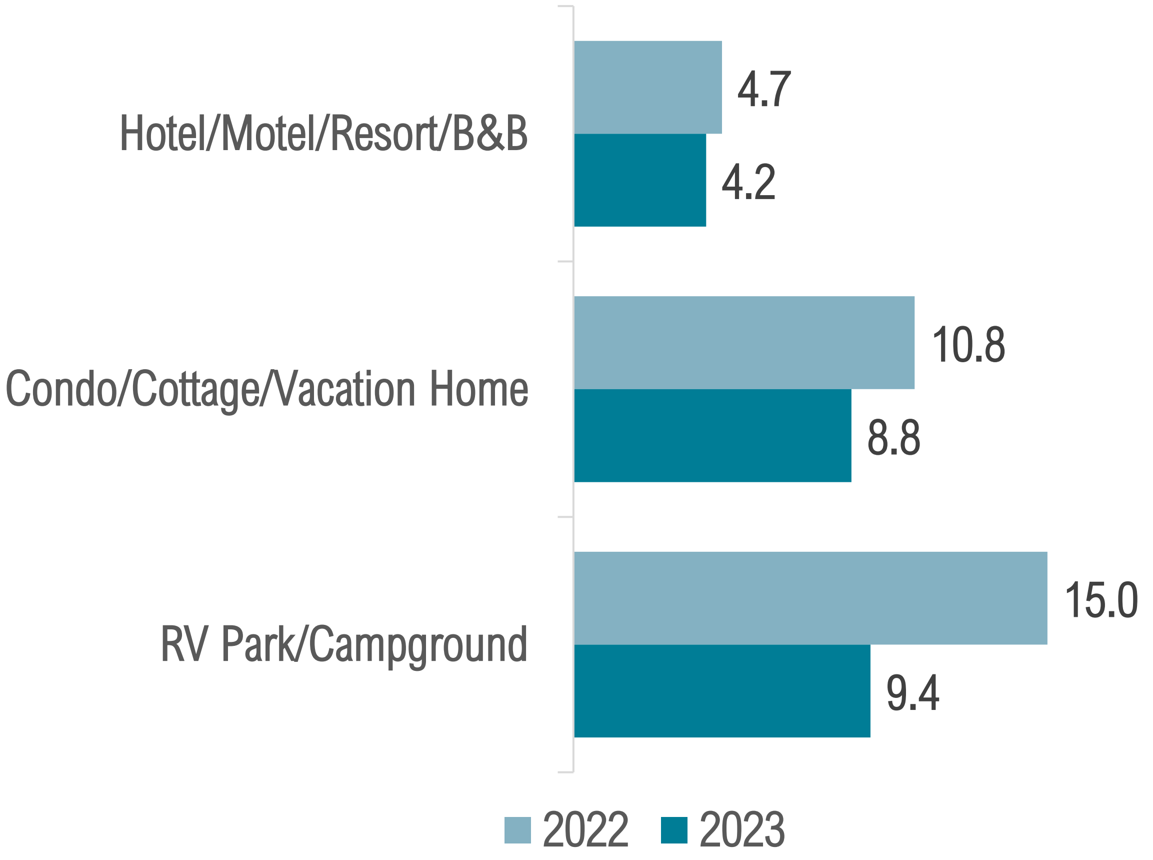
For visitors in paid accommodations, average travel party size in Oct - Dec was 2.9 people[1] (2.6 people in 2022).



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

LENGTH OF STAY

For visitors in paid accommodations, average length of stay in Oct - Dec was **5.3 nights**[1] (7.4 nights in 2022).



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

Visitor Journey: Pre-Visit

Pre-Visit

Travel Party Profile

Trip Experience

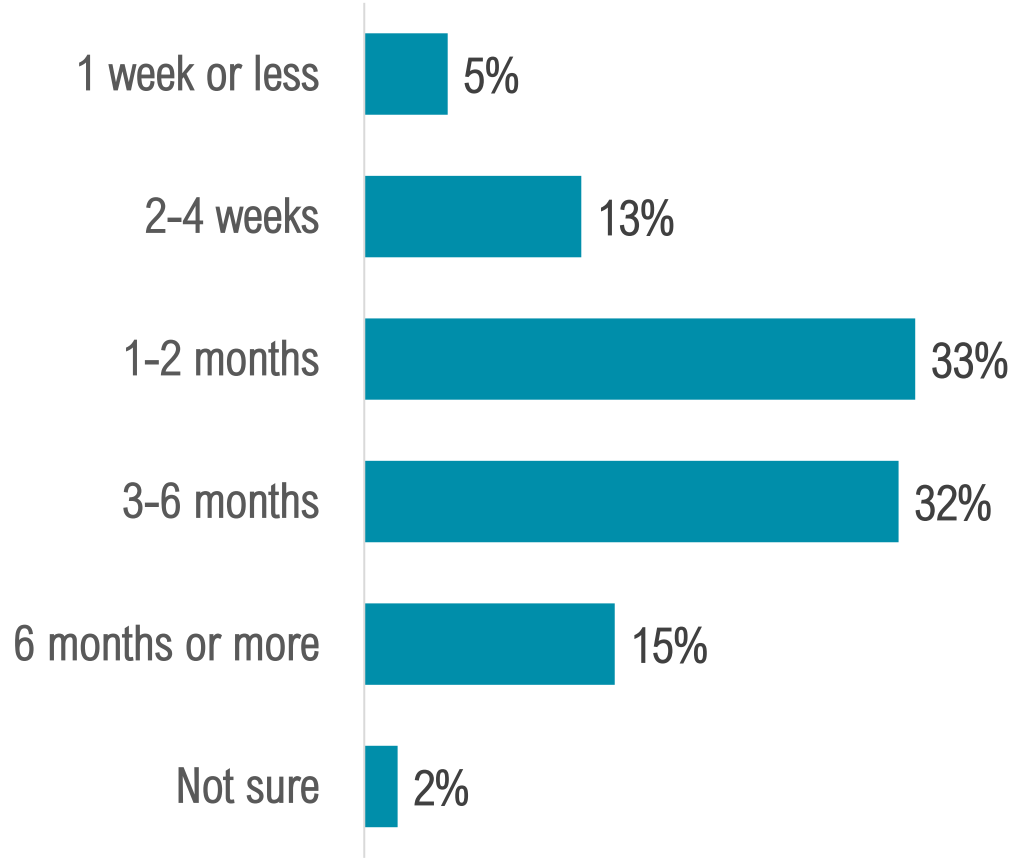
Post-Trip Evaluation

Economic Impact on Destination

TRIP PLANNING CYCLE

Over half of visitors planned their trip **less than 3 months** 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** (88 days).

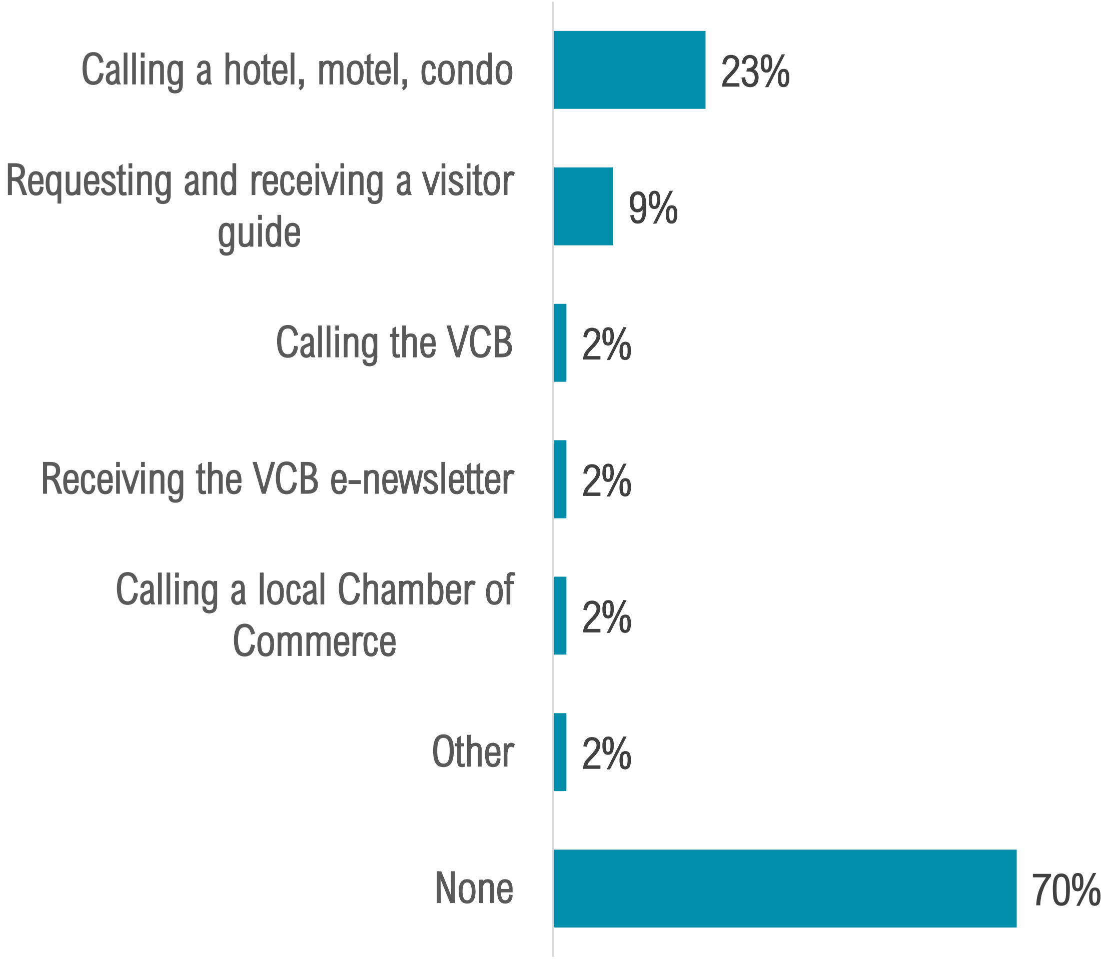


TRIP PLANNING: INFORMATION REQUESTS[1]

Over 2 in 3 visitors made information requests while planning their trip to the Fort Myers area.

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

The share of visitors requesting information in Q4 2023 was lower than in Q4 2022.



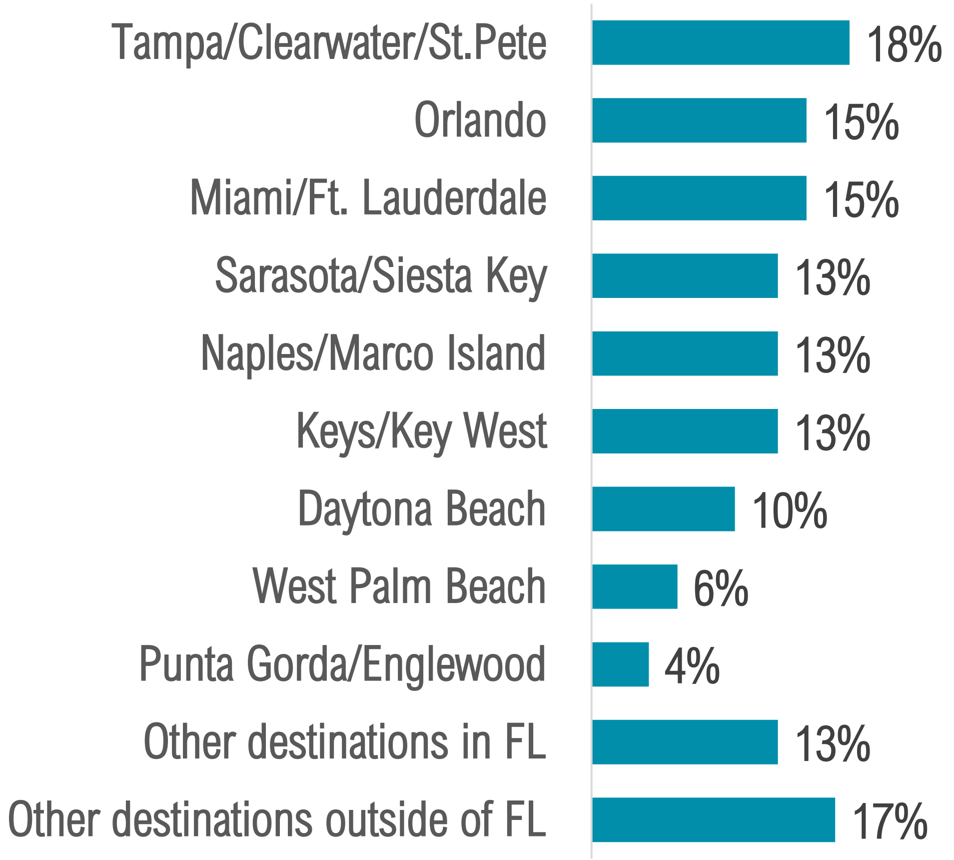
[1]Multiple responses permitted.

TRIP PLANNING: OTHER DESTINATIONS CONSIDERED[1]

Most alternate destinations considered were in Florida.

Nearly 1 in 5 visitors considered visiting the Tampa area.

BASE: 27% of visitors who considered other destinations



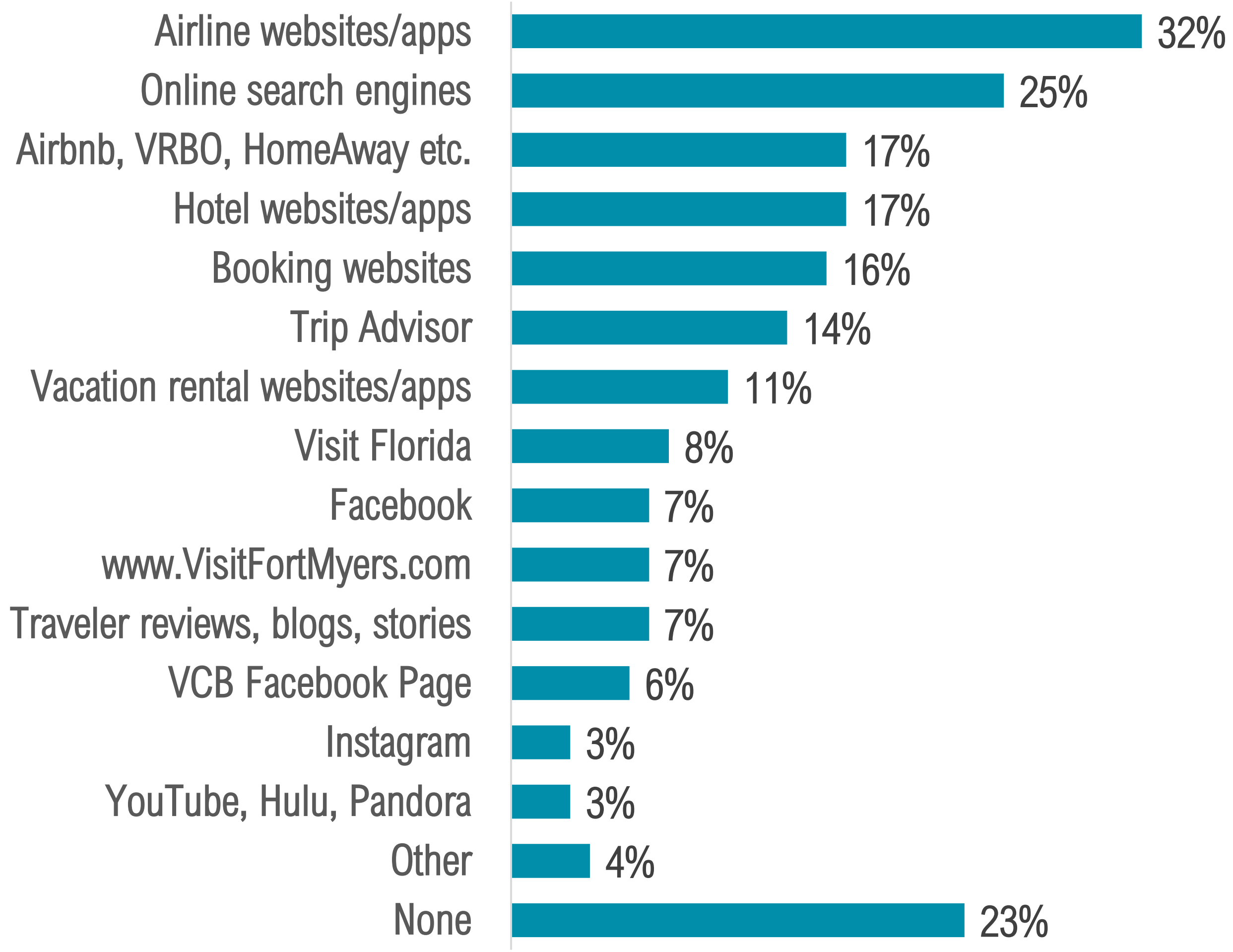
[1]Multiple responses permitted.

TRIP PLANNING: WEBSITES/APPS USED[1]

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

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

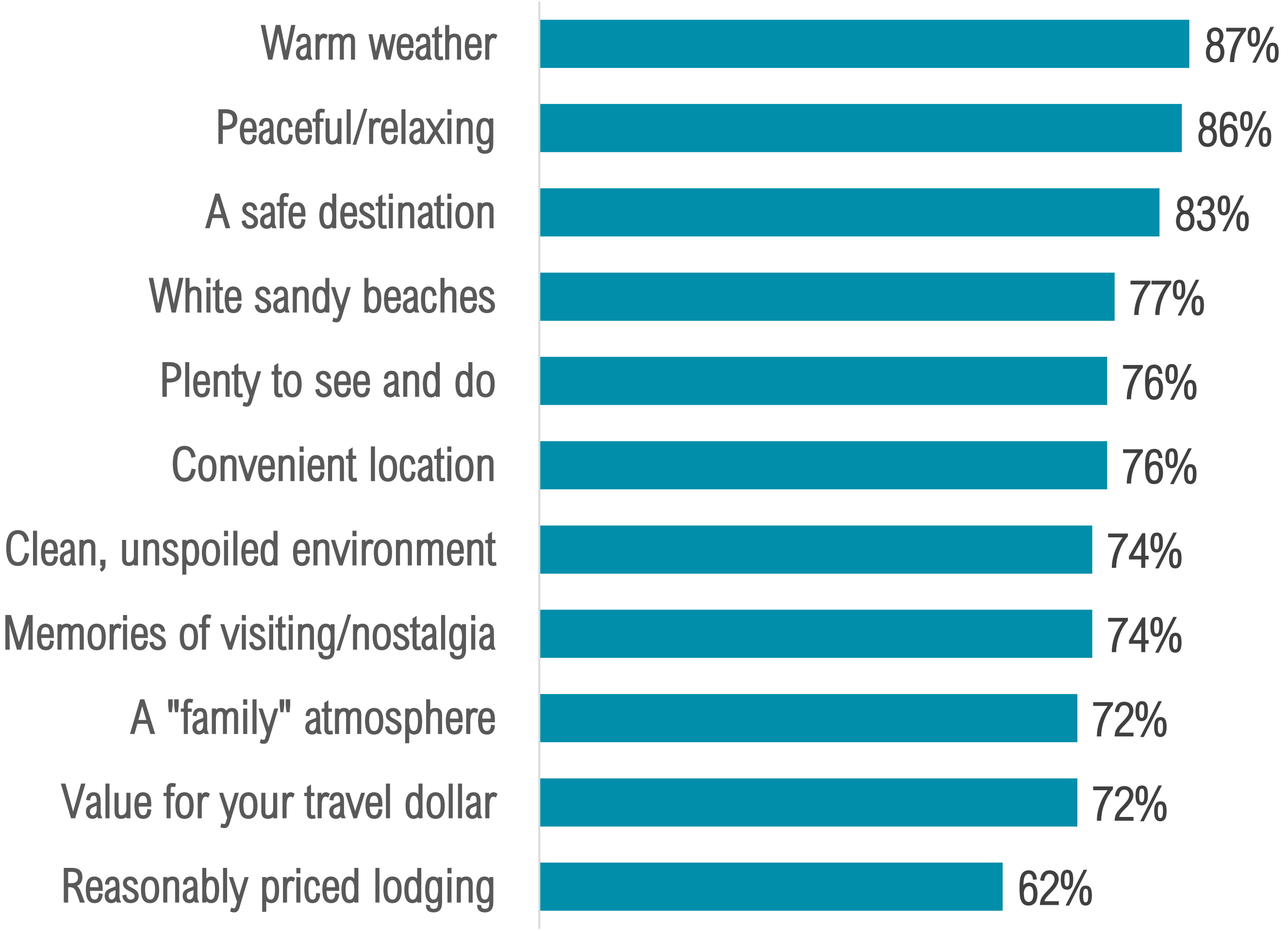
Nearly 1 in 5 visitors used either **Airbnb, VRBO, HomeAway**, **hotel websites/apps**, or **booking websites** to plan their trips.



[1]Multiple responses permitted.

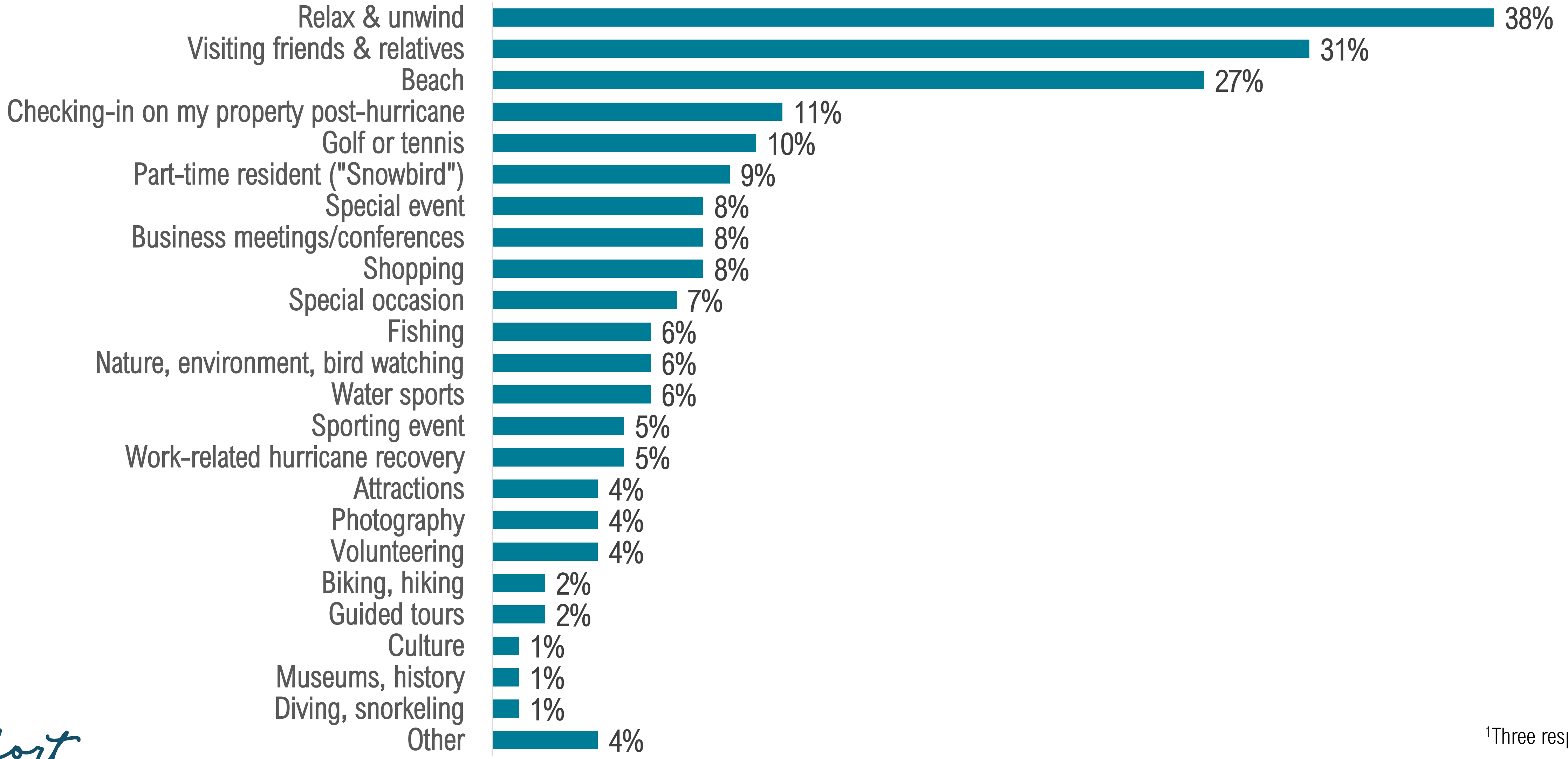
TRIP INFLUENCES[1]

Visitors were heavily influenced by the **warm weather, peacefulness,** and **safety** 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]

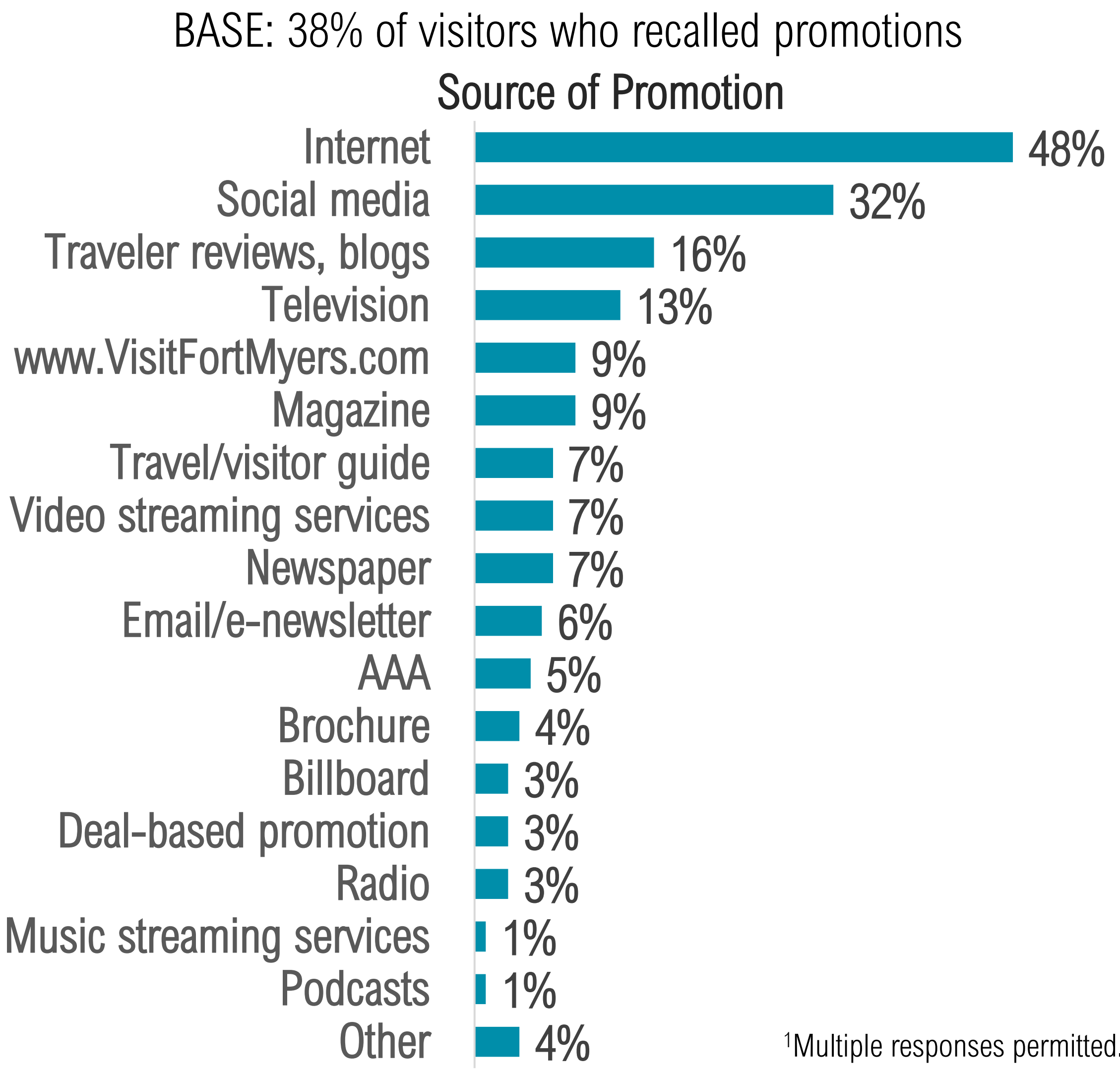


[1]Three responses permitted.

PROMOTIONS RECALL[1]

38% of visitors recalled promotions in the past 6 months for the Fort Myers area.

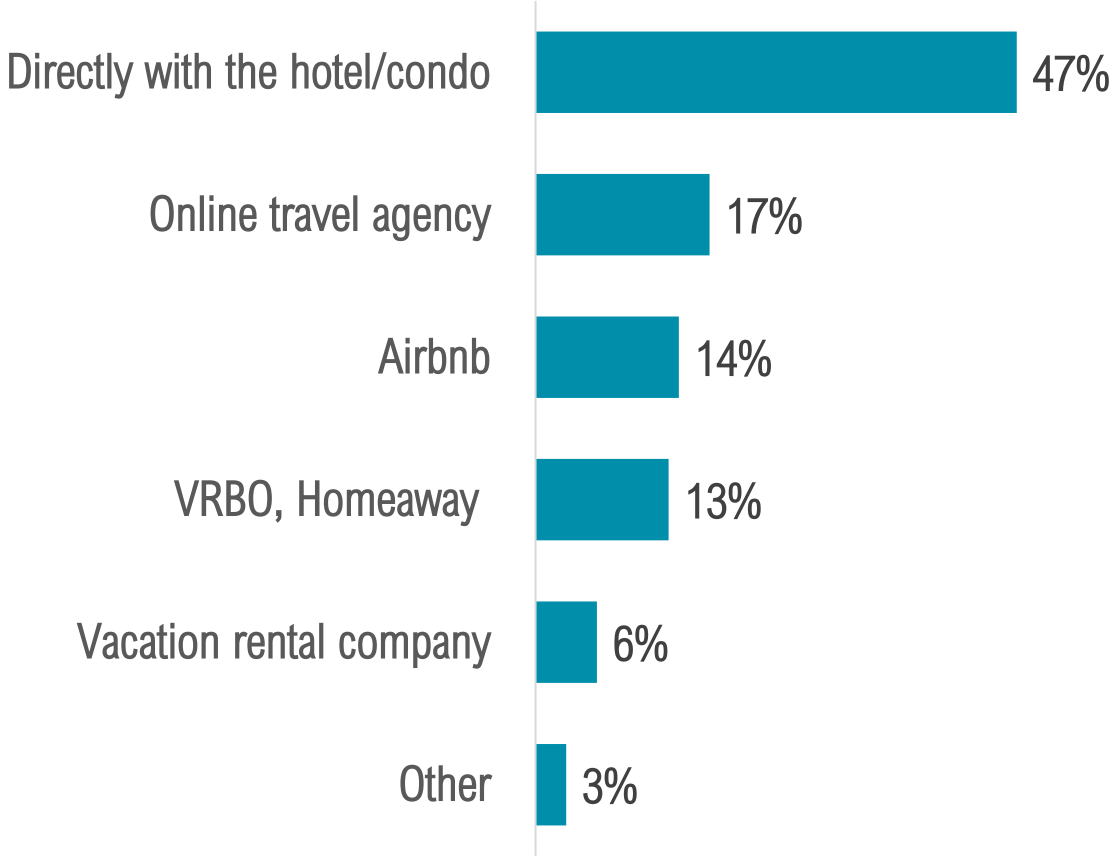
This influenced 19% of all visitors to come to the Fort Myers area.



[1]Multiple responses permitted.

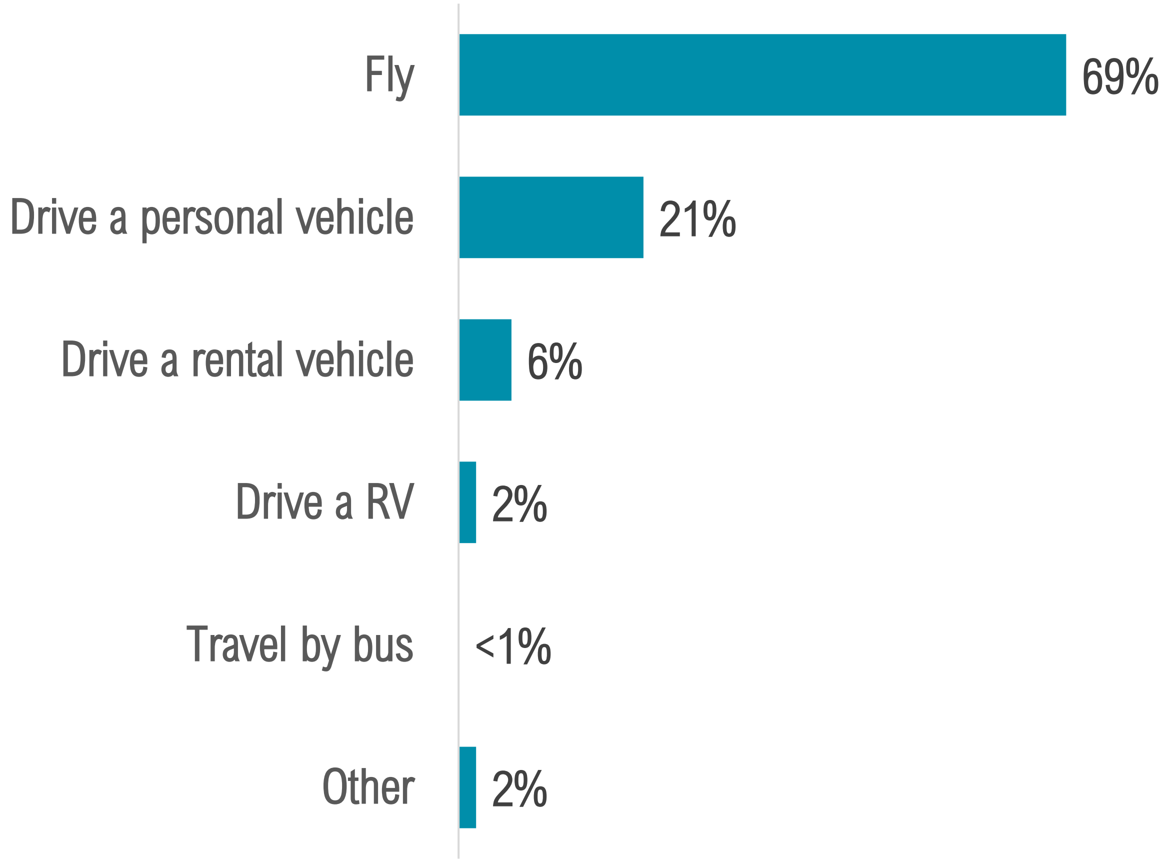
BOOKING

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



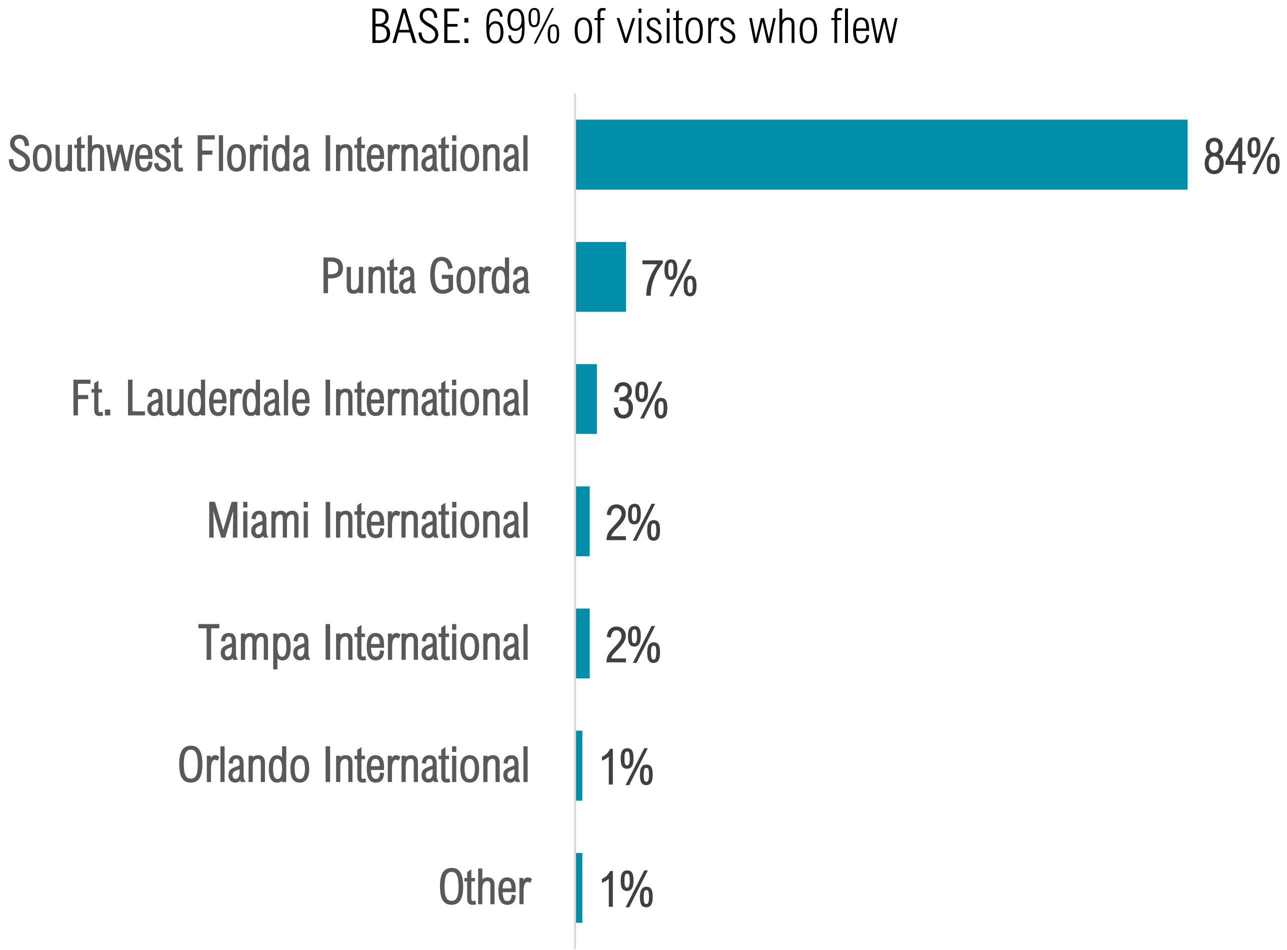
TRANSPORTATION

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



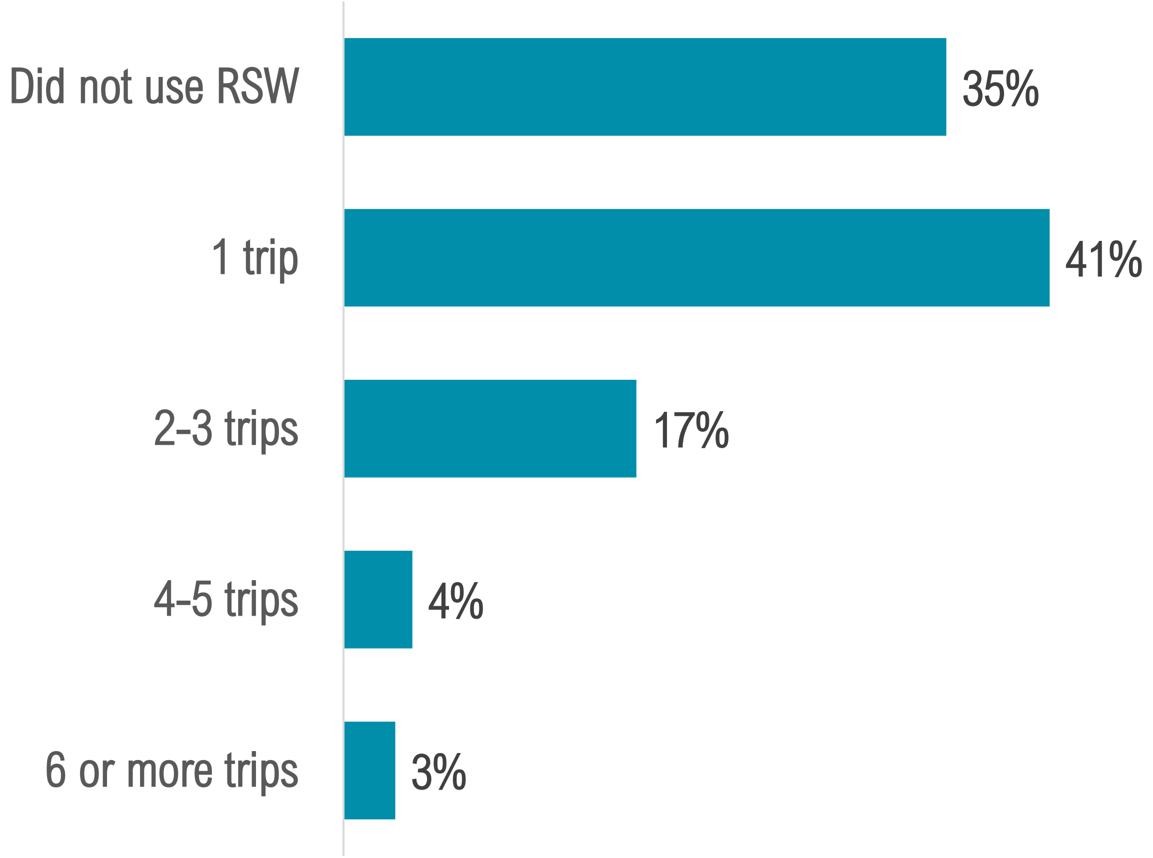
AIRPORT

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



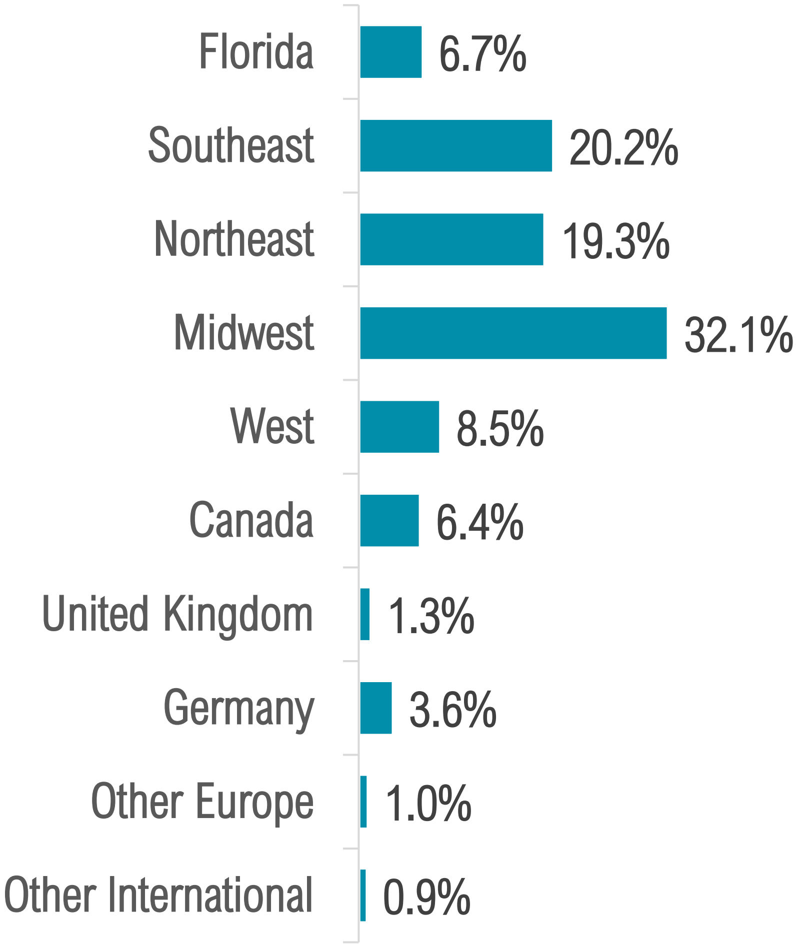
USE OF RSW IN THE PAST YEAR

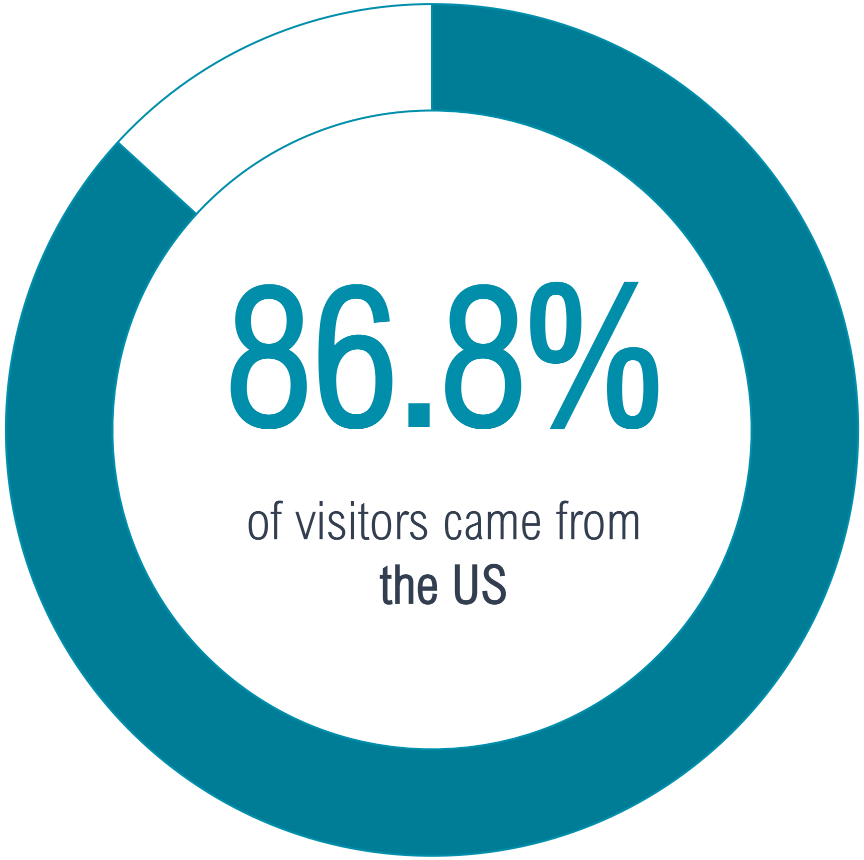
65% of visitors used RSW **at least once** in the past year.



VISITOR JOURNEY: TRAVEL PARTY PROFILE

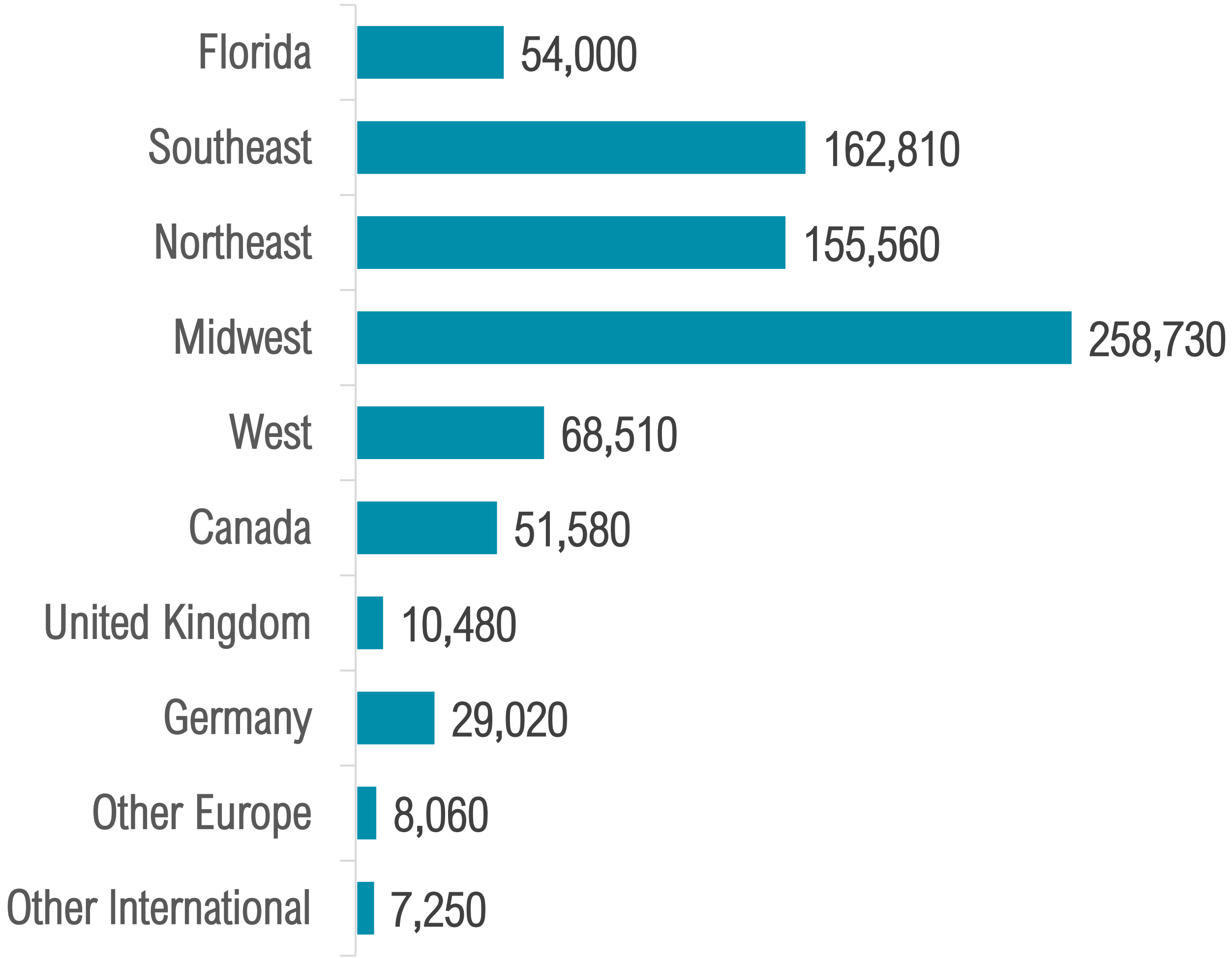
ORIGIN[1]





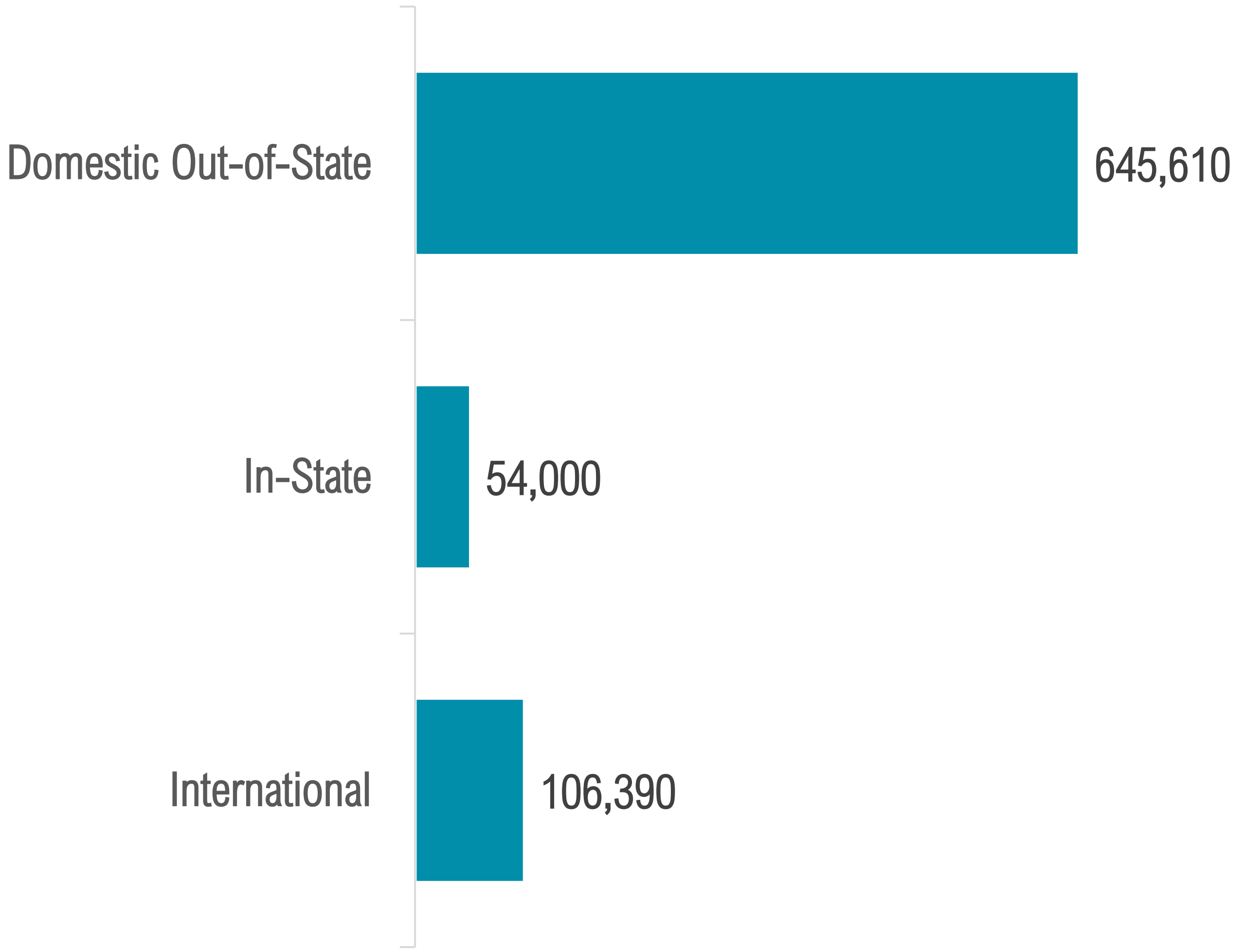
[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers. Based on data from the Visitor Tracking Study.

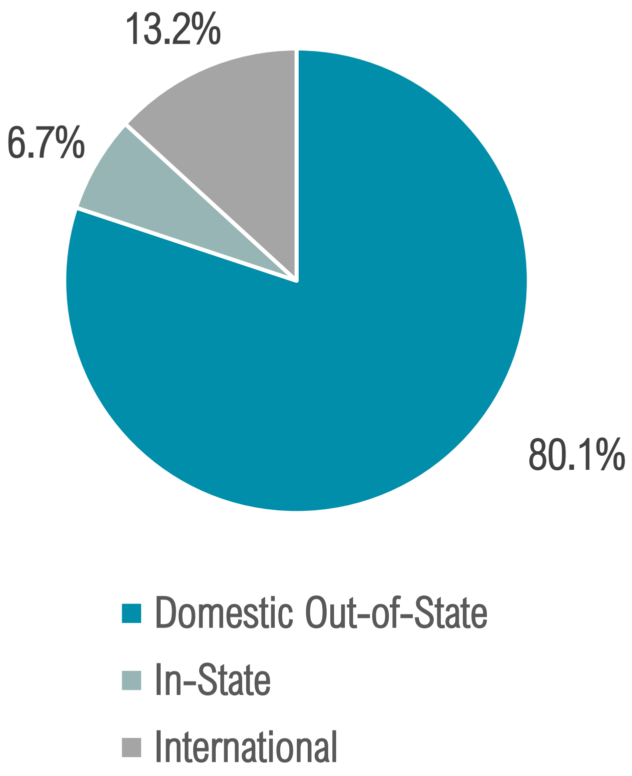
NUMBER OF VISITORS BY ORIGIN[1]



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

NUMBER OF VISITORS BY ORIGIN

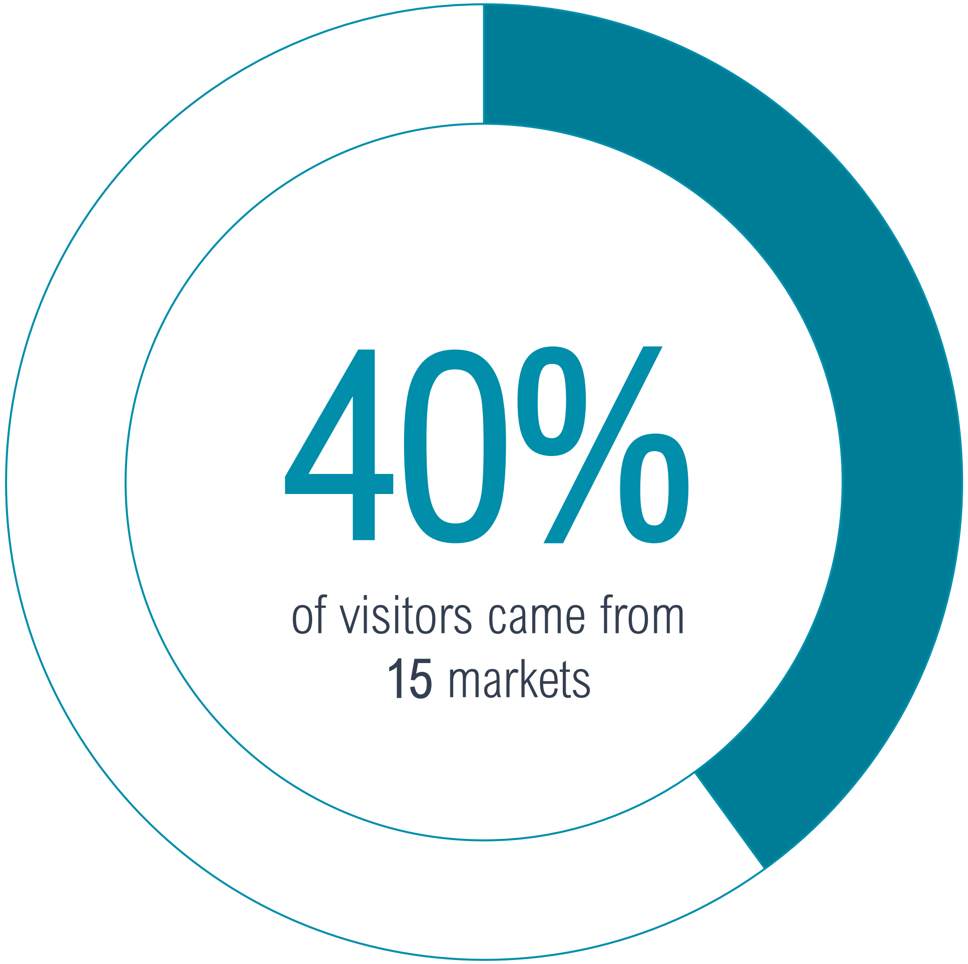




[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers.
Based on data from the Visitor Tracking Study.

ORIGIN MARKETS[1]

Market [2]	Percentage of Visitors
NEW YORK	5%
ATLANTA	4%
CHICAGO	4%
DETROIT	3%
MINNEAPOLIS - SAINT PAUL	3%
PHILADELPHIA	3%
BOSTON	2%
CINCINNATI	2%
CLEVELAND - AKRON	2%
DENVER	2%
NAPLES & SURROUNDING AREAS	2%
INDIANAPOLIS	2%
MILWAUKEE	2%
PITTSBURGH	2%
WASHINGTON, DC - HAGERSTOWN	2%



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

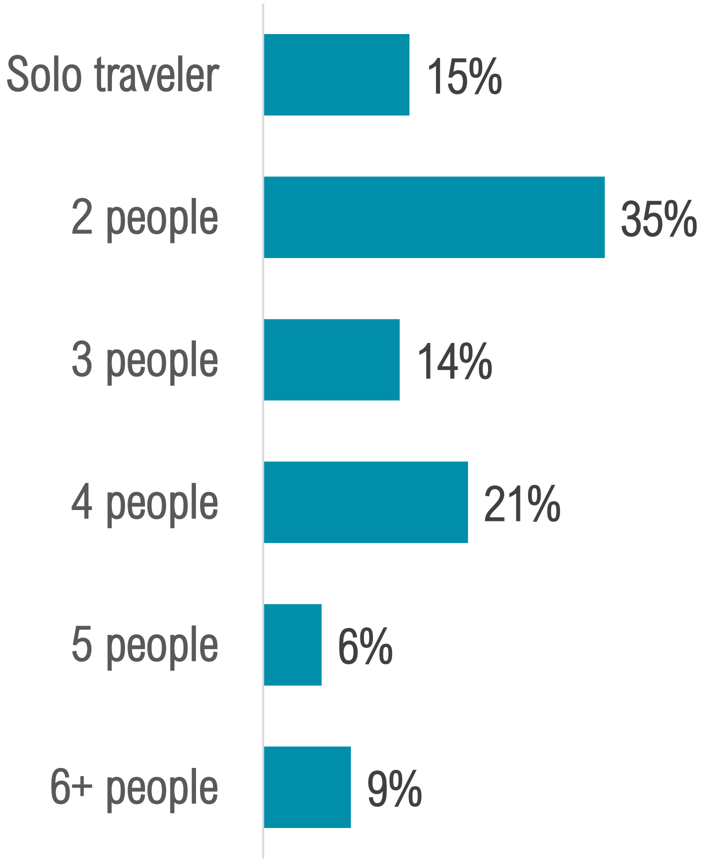
TRAVEL PARTY SIZE AND COMPOSITION

Travel Party Size

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

Travel with Children

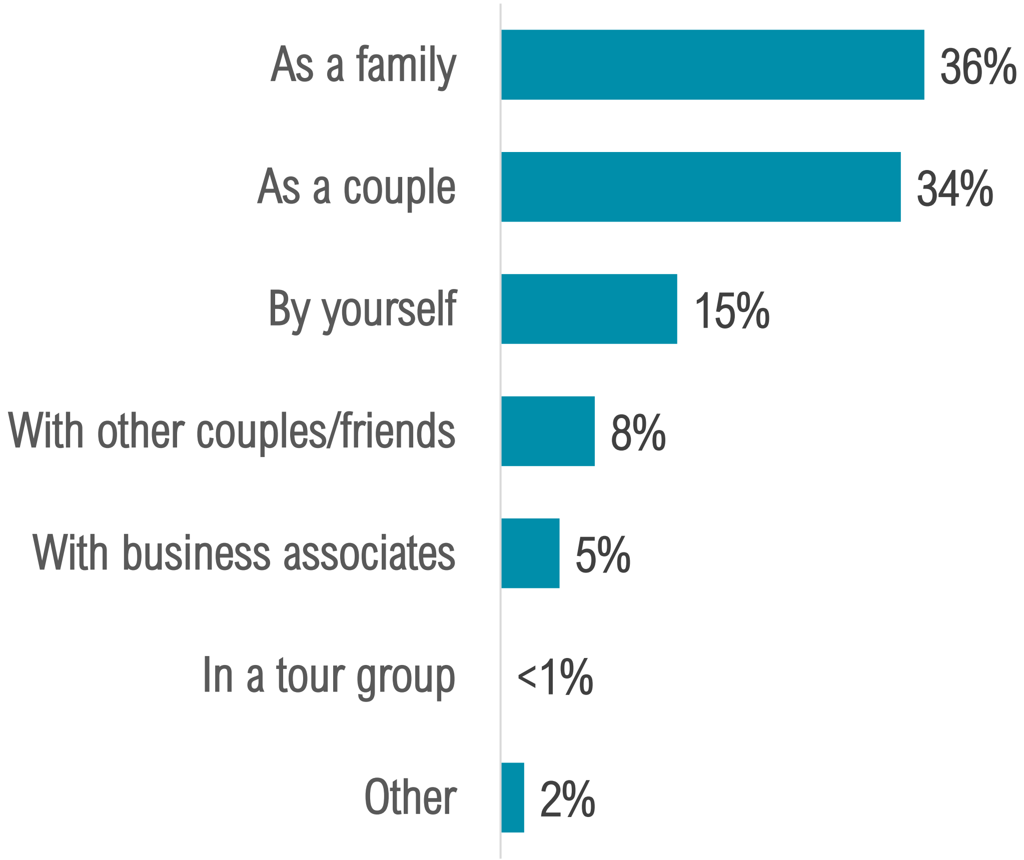
32% of visitors **traveled with children** under the age of 18.



[1]Sources: Occupancy Study and Visitor Tracking Study

TRAVEL PARTY TYPE

Over 1 in 3 visitors traveled either as a **family** or as a **couple**, while **15%** of visitors traveled **alone.**



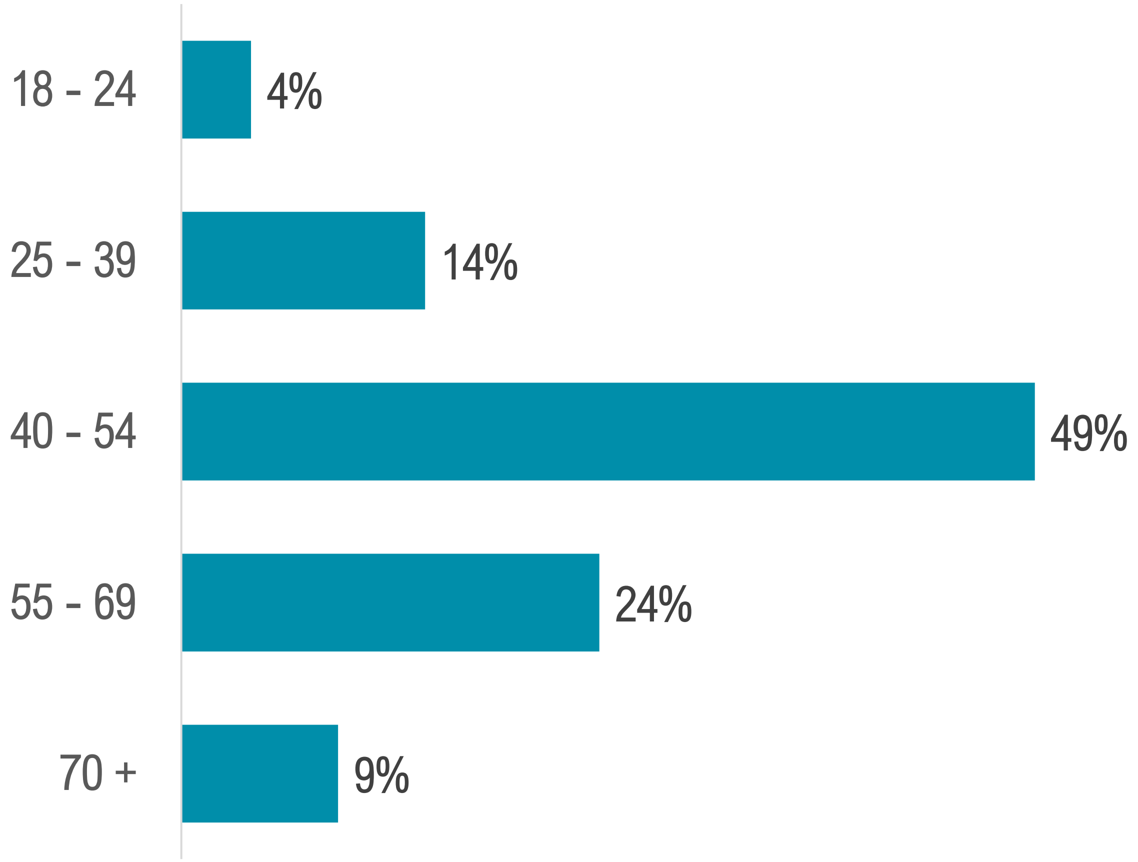
AGE

Average Age

The average age of Oct - Dec visitors was **50 years old.**

Median Age

The median age of Oct - Dec visitors was **50 years old.**

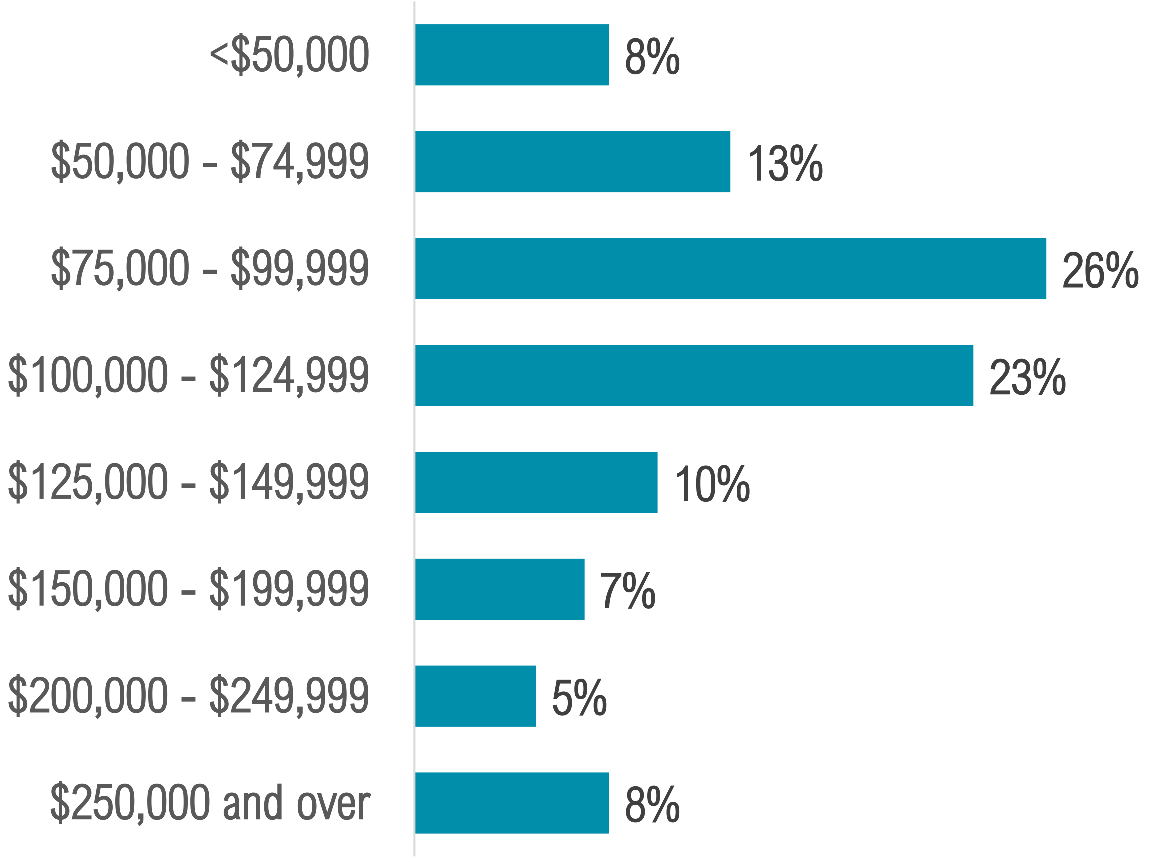


HOUSEHOLD INCOME

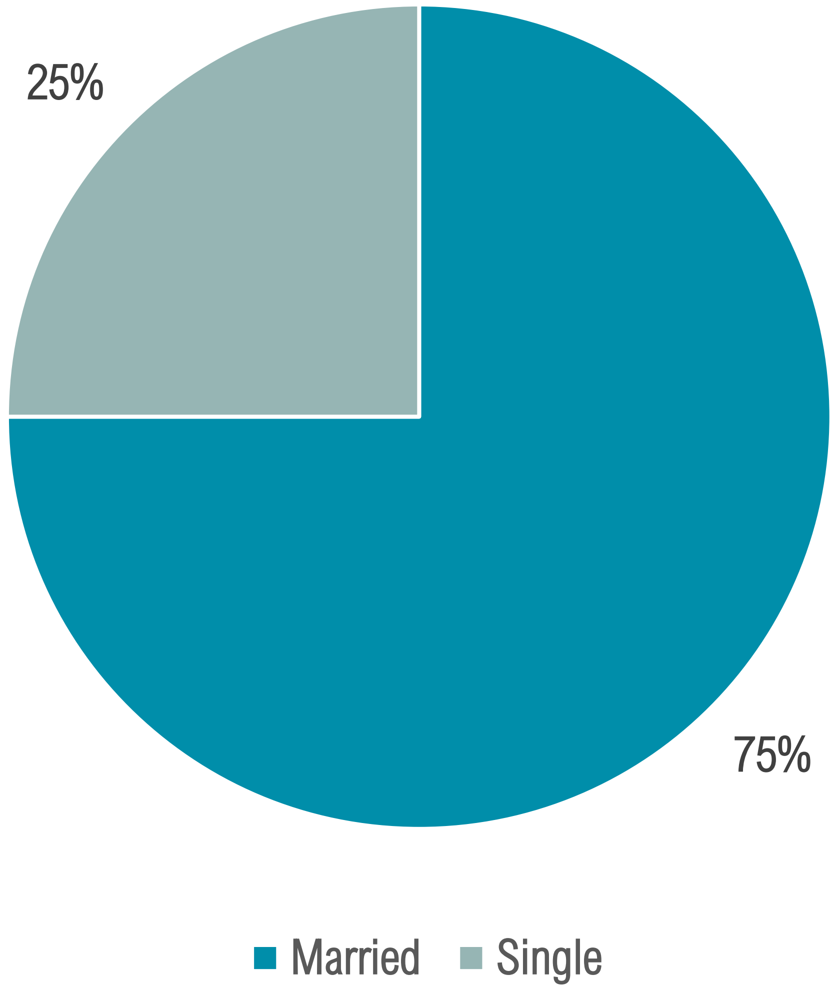
Median Household Income

Oct - Dec visitors had a median household income of **$103,300.**

13% of visitors had a household income in excess of **$200,000.**



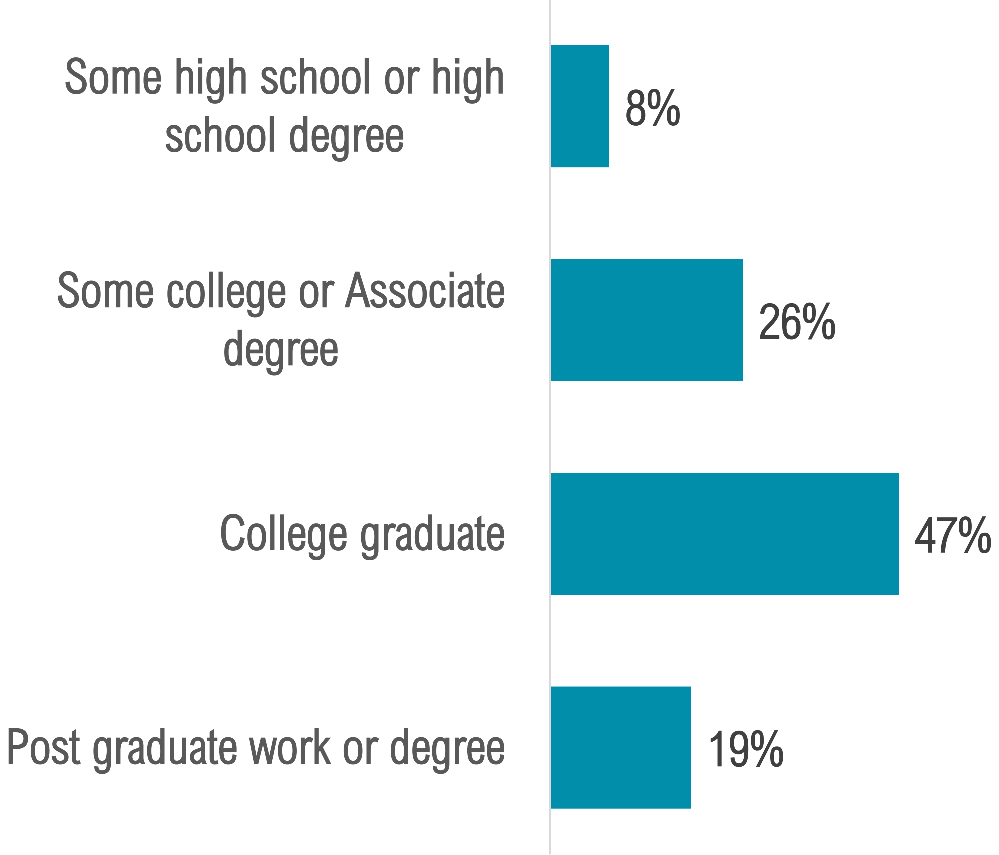
MARITAL STATUS



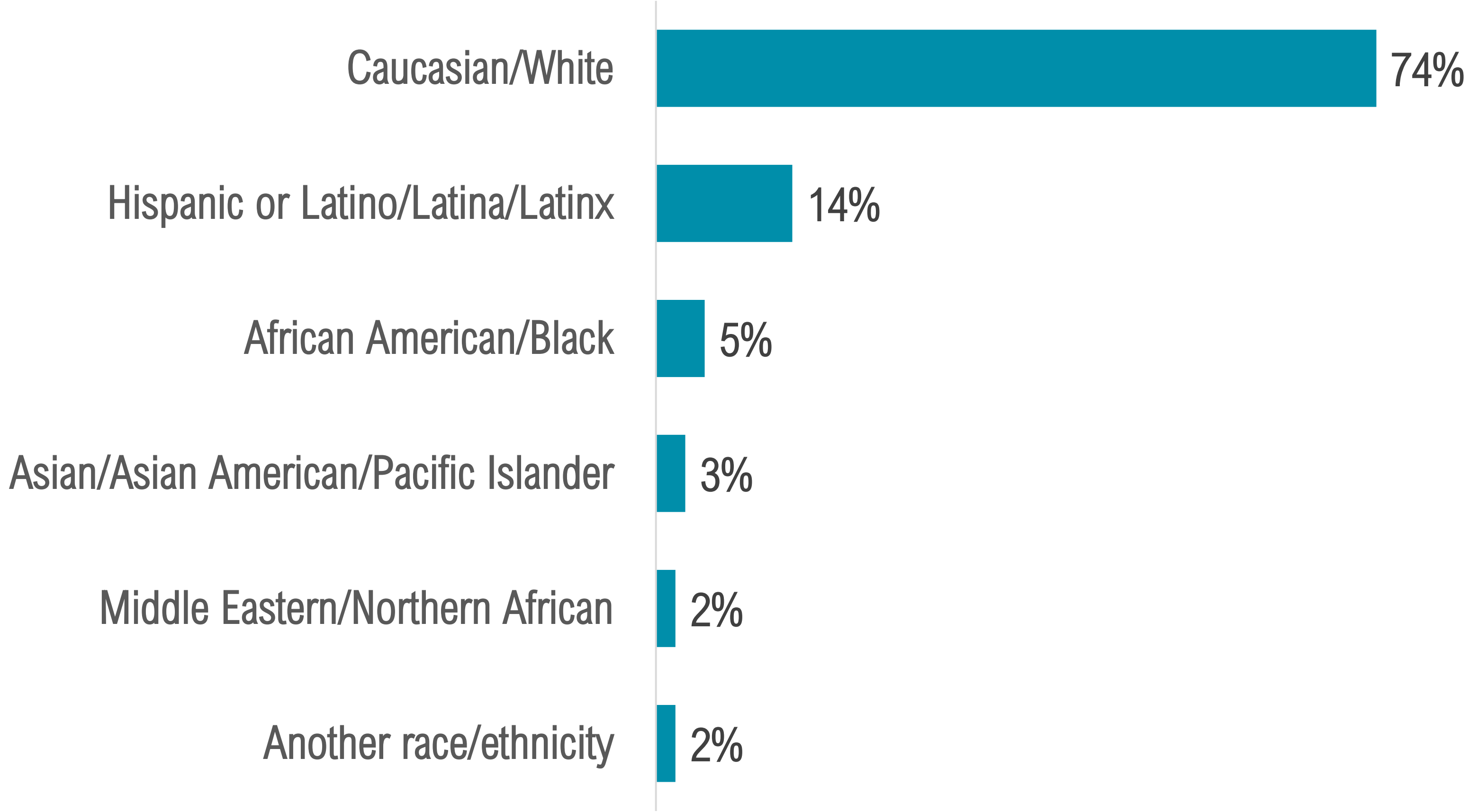
EDUCATION

Education Level

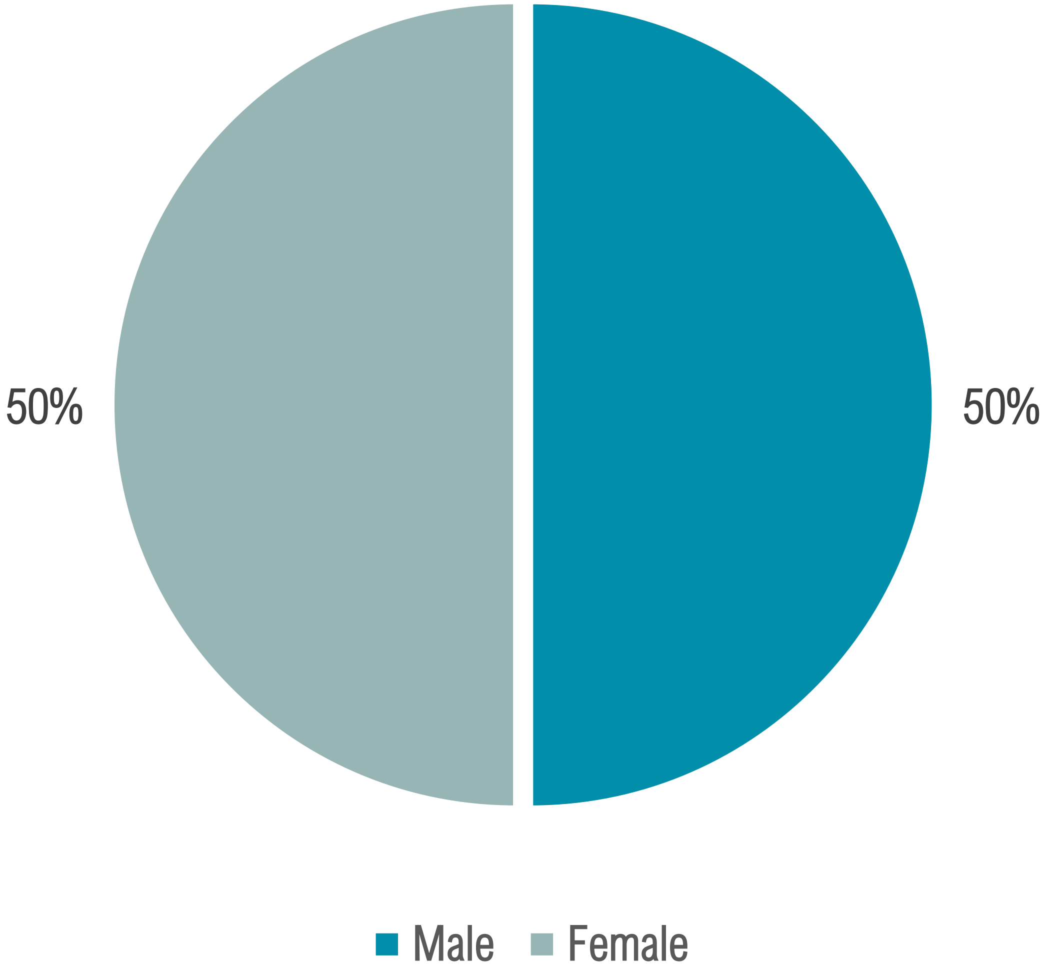
2 in 3 of Oct - Dec visitors have achieved a bachelor's degree or higher.



RACE/ETHNICITY



GENDER[1]



[1]Gender of person interviewed.

VISITOR JOURNEY: TRIP EXPERIENCE

Pre-Visit

Travel Party Profile

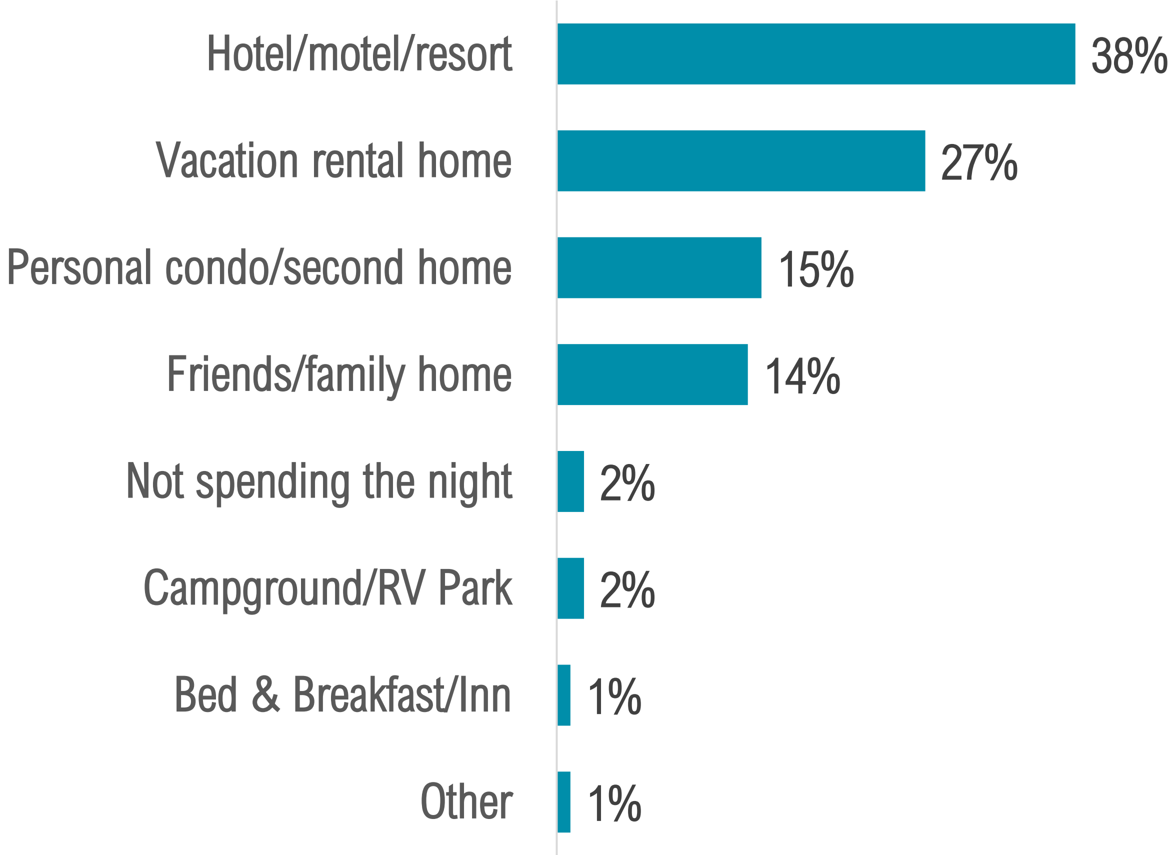
Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

ACCOMMODATIONS

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



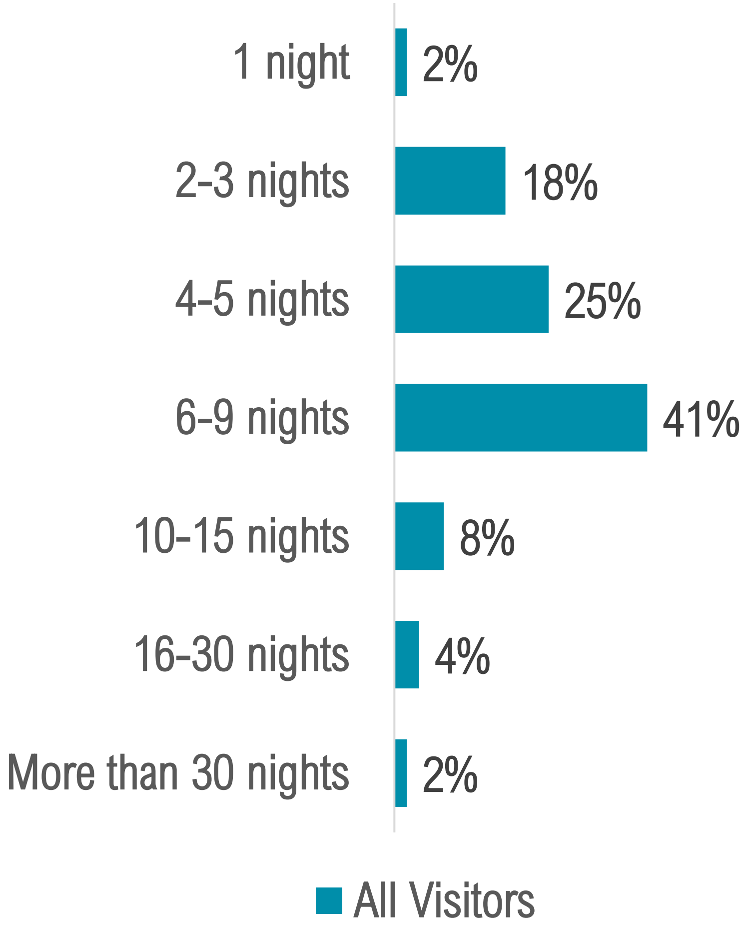
NIGHTS STAYED

All Visitors

Visitors spent an average of **5.9[1] nights** in the Fort Myers area.

Visitors Staying in Paid Accommodations

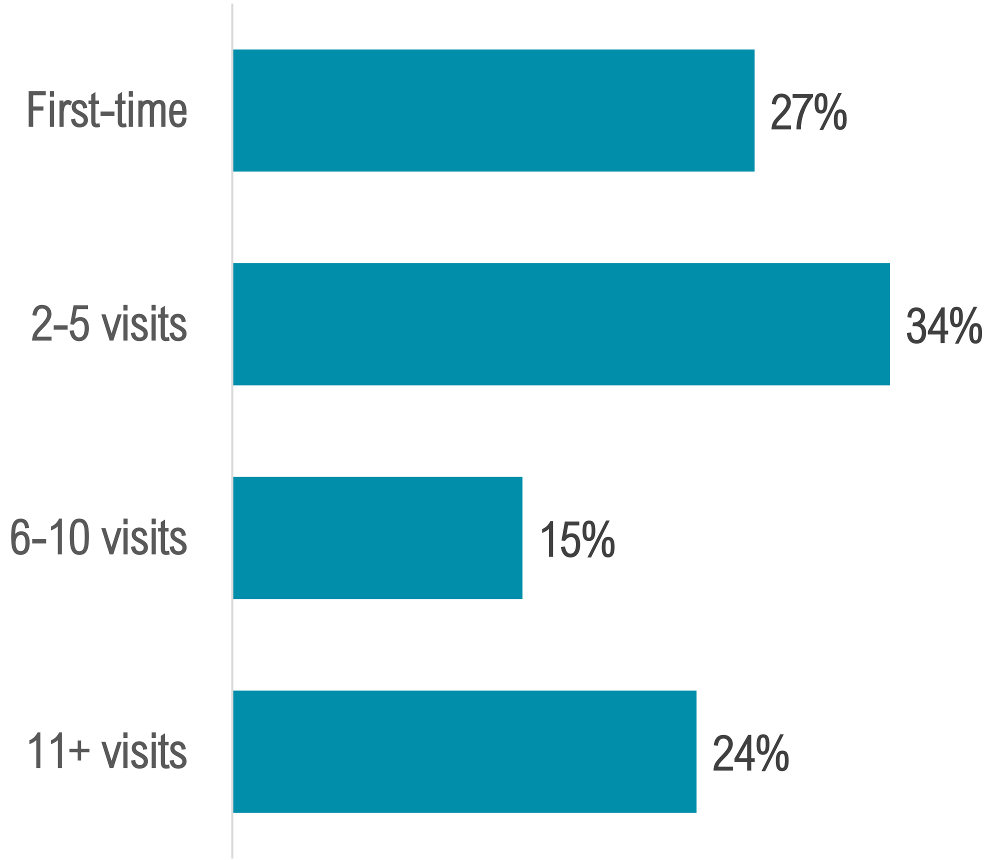
Visitors staying in paid accommodations spent an average of **5.3[2] nights** in the Fort Myers area.



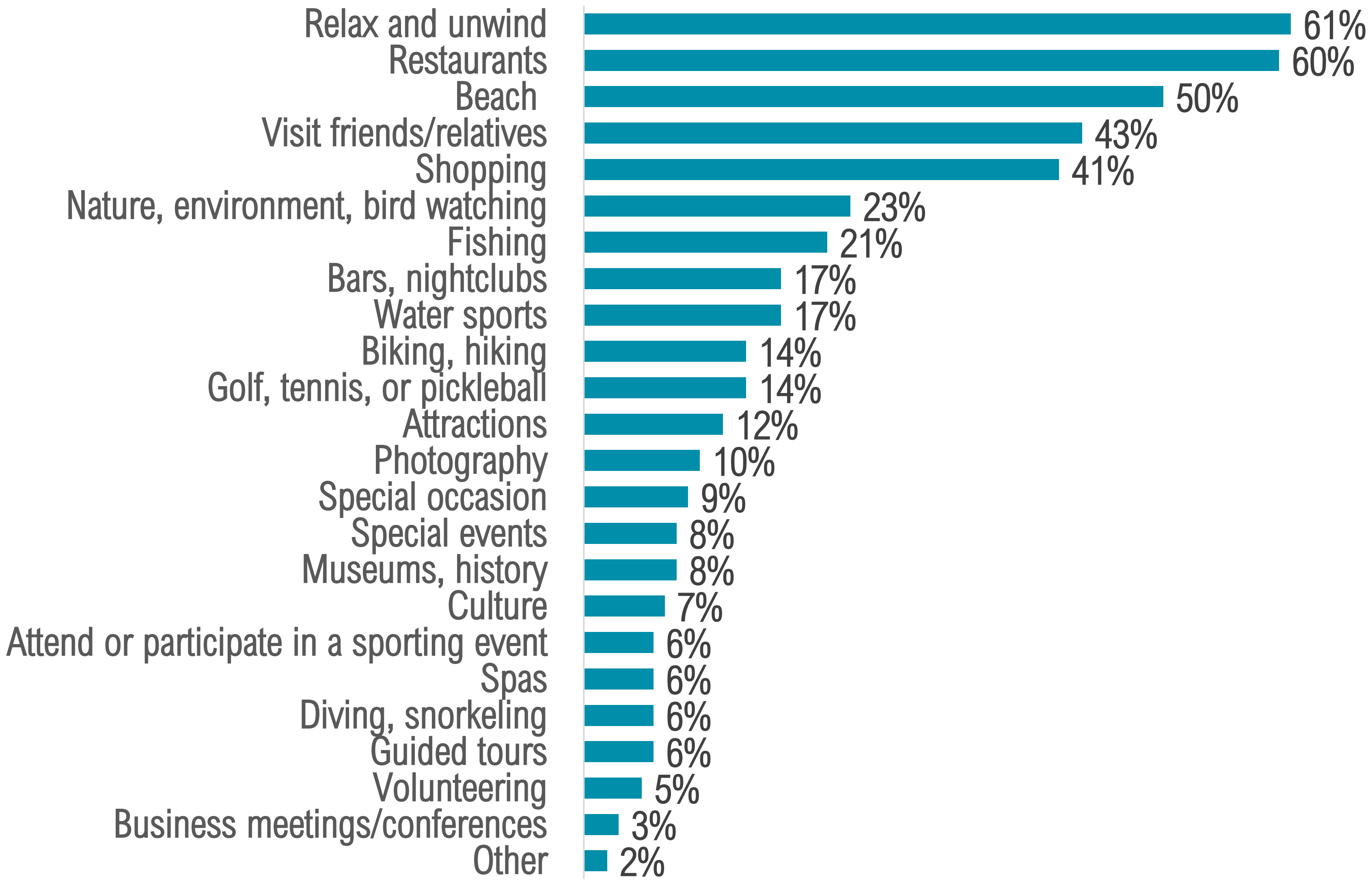
[1]Sources: Occupancy Study and Visitor Tracking Study
[2]Source: Occupancy Study

FIRST TIME AND EXPERIENCED VISITORS

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



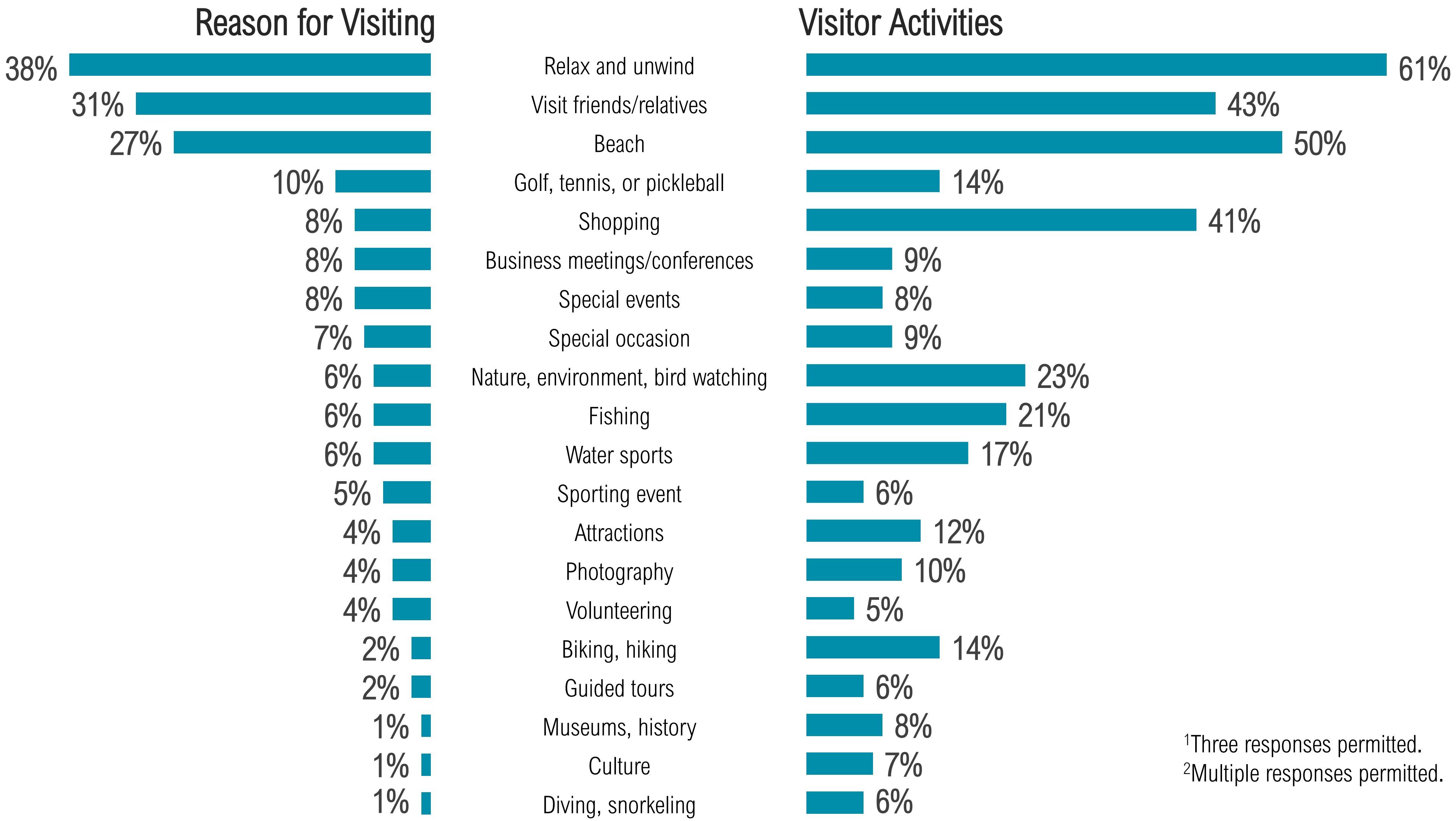
VISITOR ACTIVITIES[1]



Trip Experience
Oct - Dec 2023

[1]Multiple responses permitted.

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



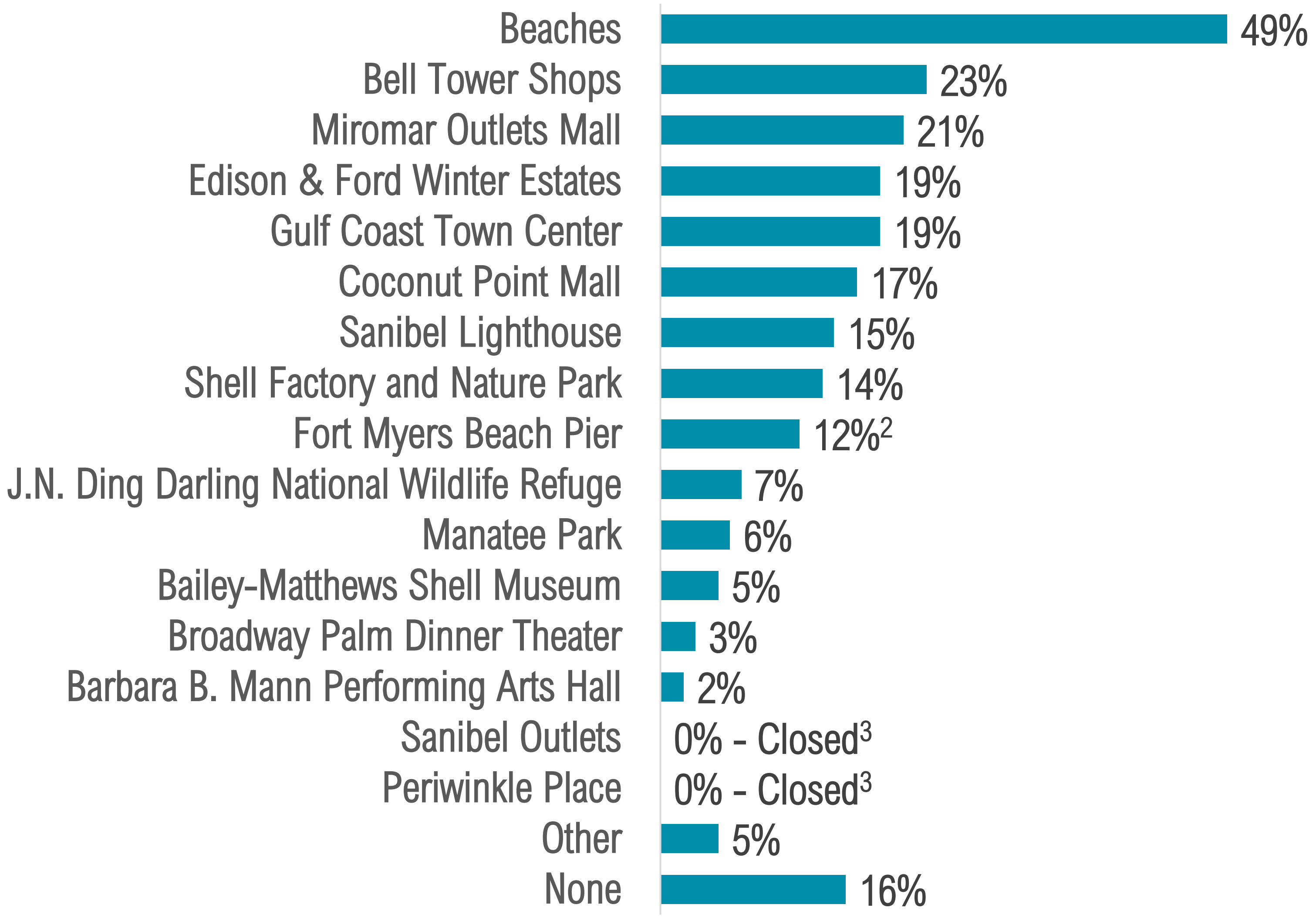
[1]Three responses permitted.
[2]Multiple responses permitted.

Oct - Dec 2023

fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

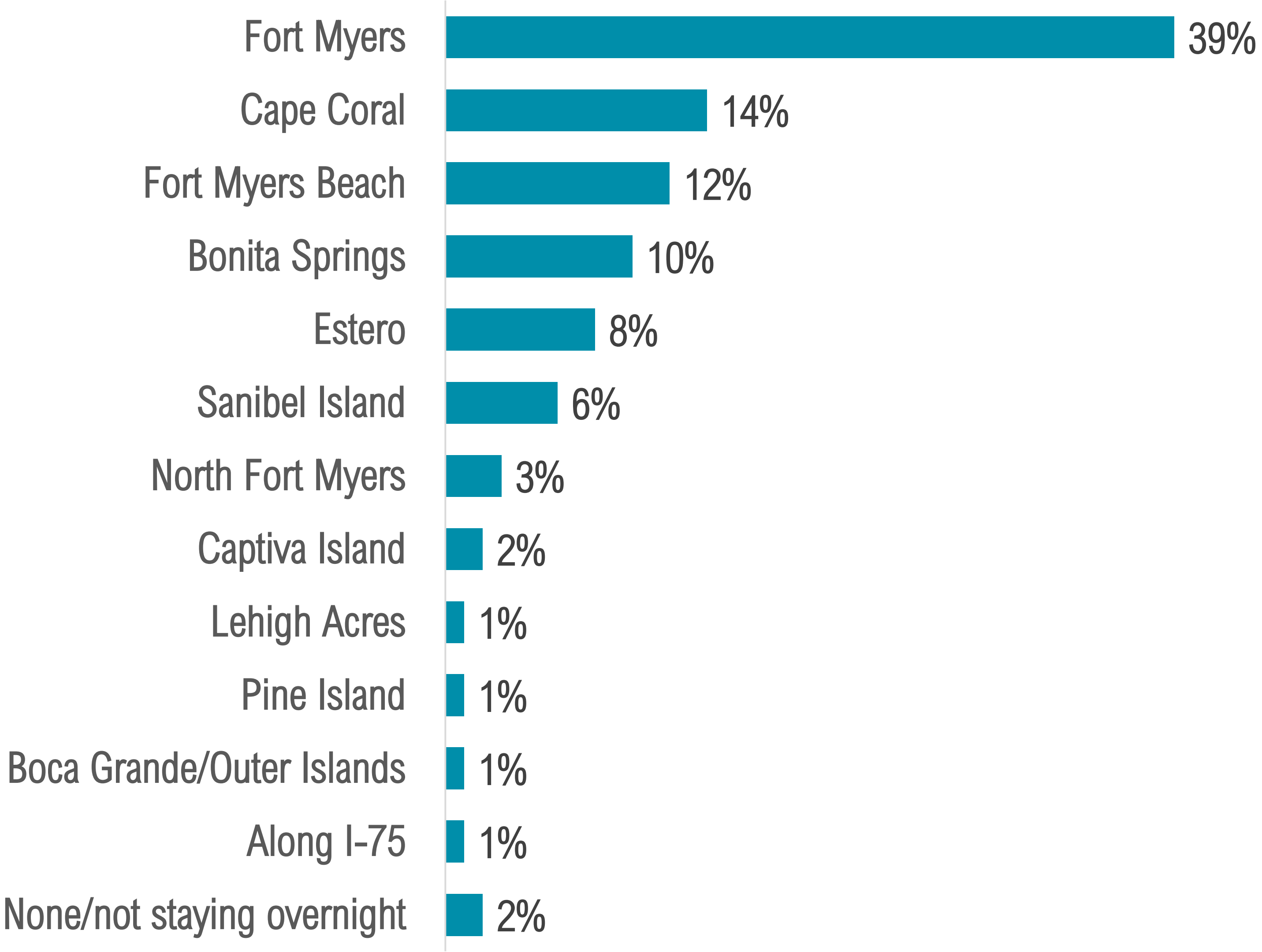
downs & st. germain RESEARCH

ATTRACTIONS VISITED[1]



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

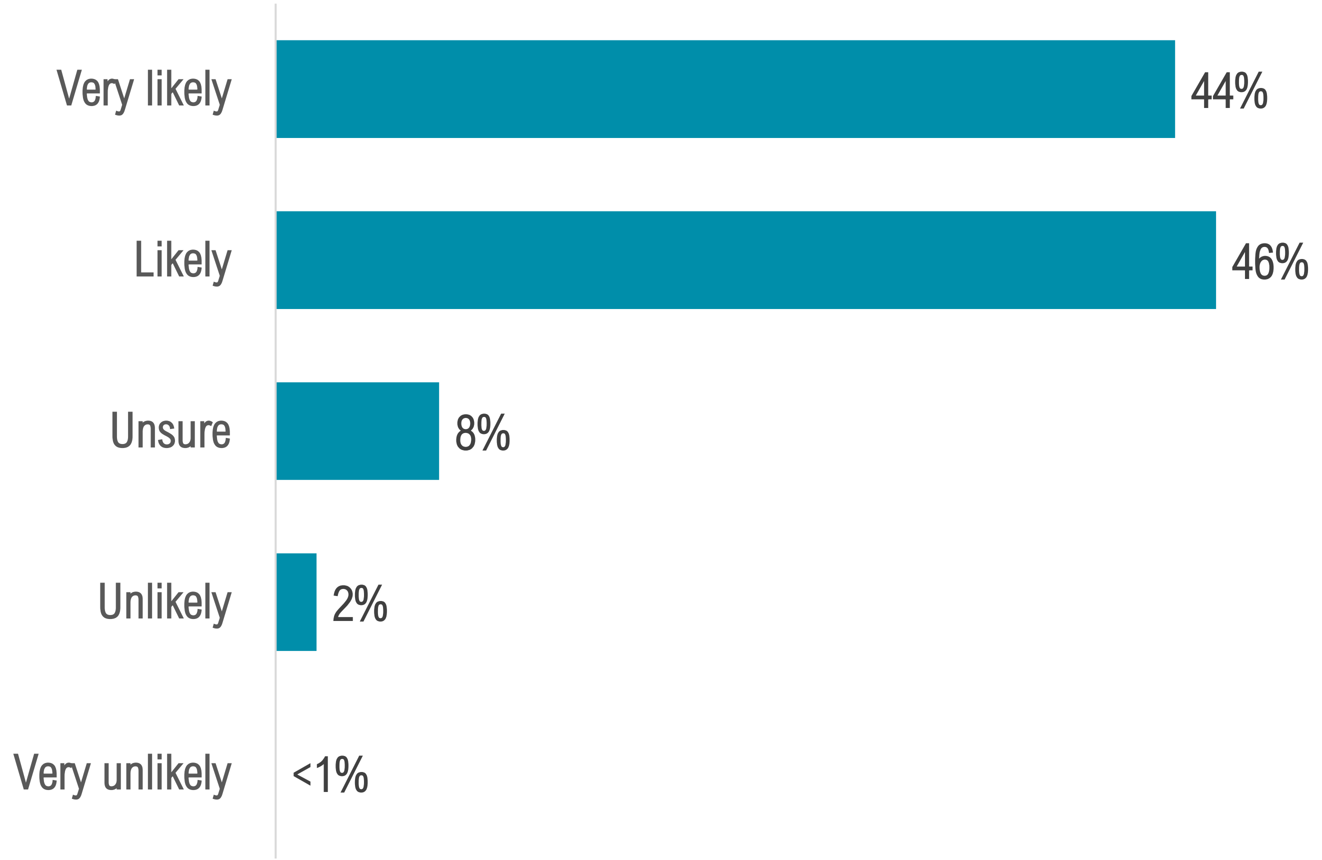
COMMUNITY STAYED



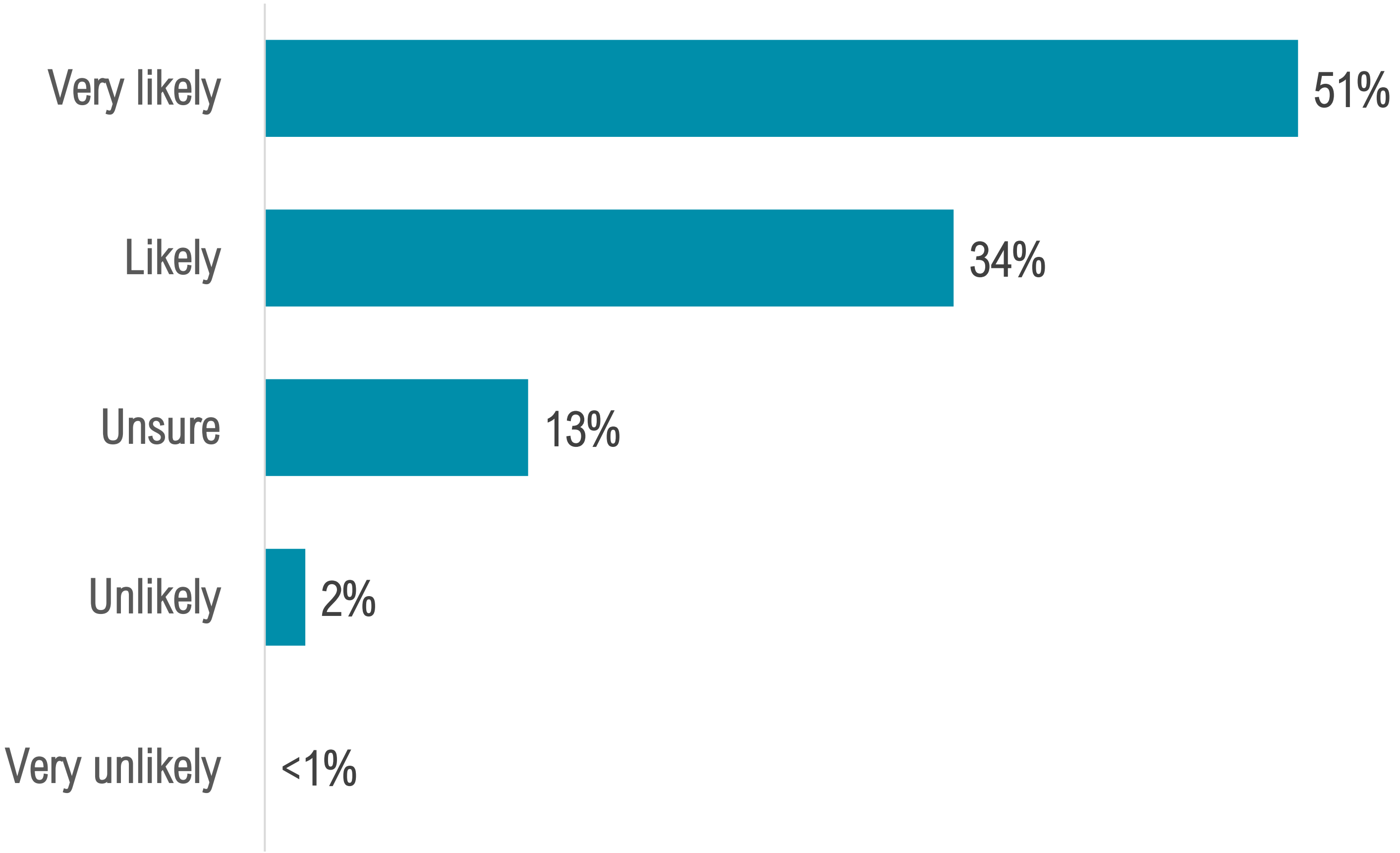
VISITOR JOURNEY: POST-TRIP EVALUATION

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

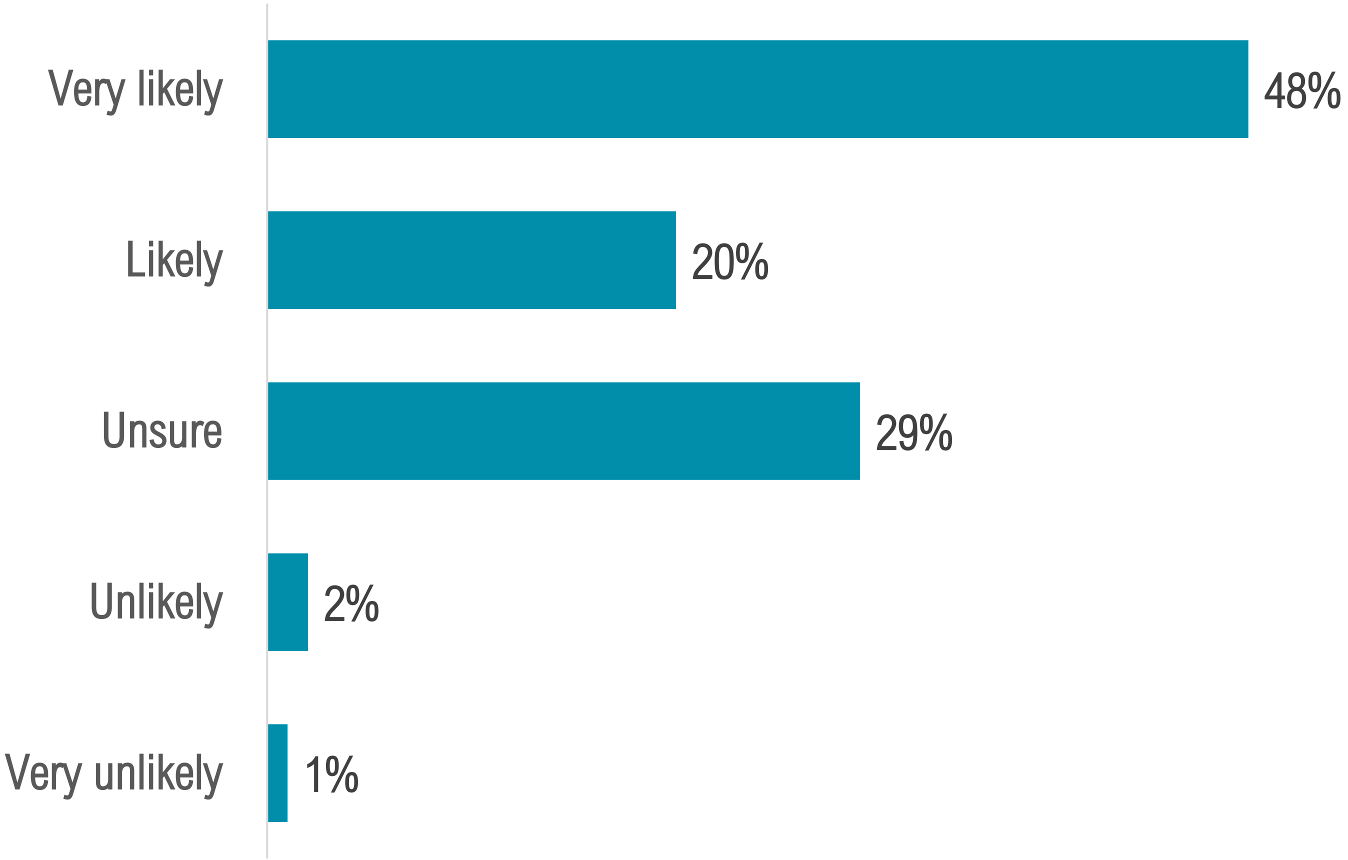
LIKELIHOOD OF RECOMMENDING THE AREA



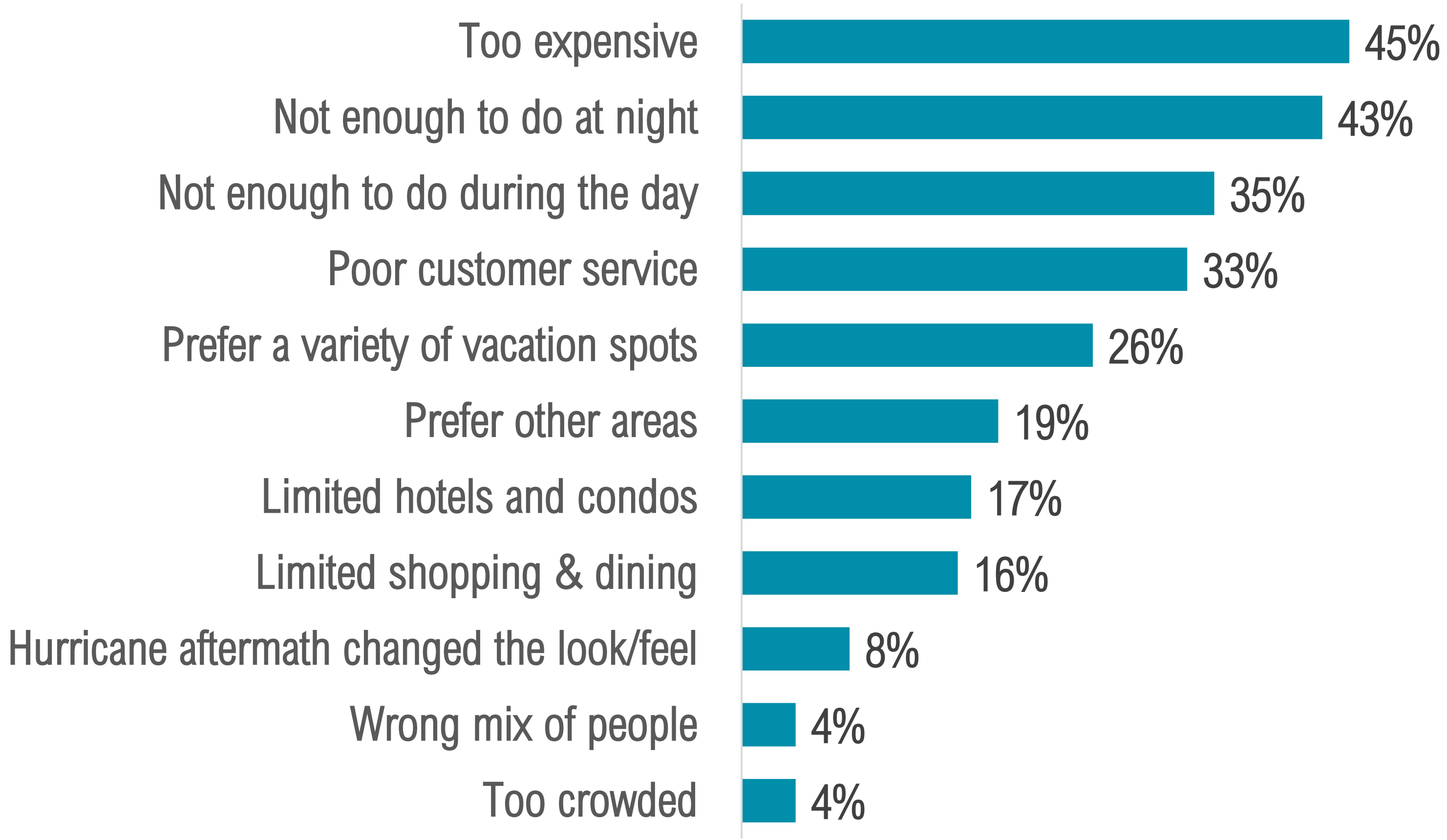
LIKELIHOOD OF RETURNING TO THE AREA



LIKELIHOOD OF RETURNING NEXT YEAR

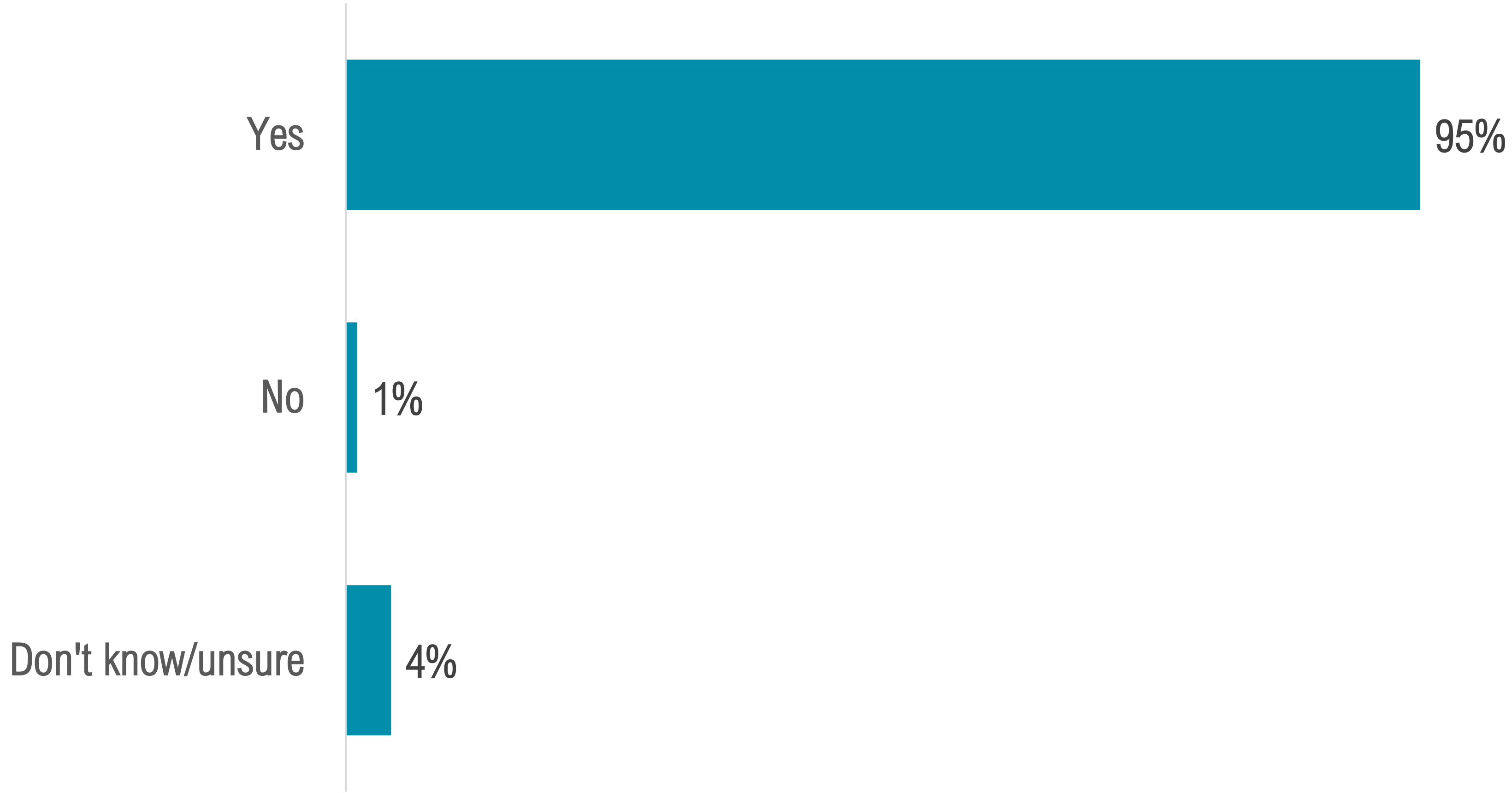


REASONS FOR NOT RETURNING[1]



[1]Multiple responses permitted. Only asked of respondents who said they were “very unlikely” or “unlikely” to return to the area which represents only 2% 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>39%</td><td rowspan="2">83%</td><td>49%</td><td rowspan="2">86%</td><td>43%</td><td rowspan="2">95%</td><td>55%</td></tr>
<tr><td>Likely</td><td>42%</td><td>46%</td><td>47%</td><td>41%</td></tr>
<tr><td>Unsure/don’t know</td><td>11%</td><td>15%</td><td>8%</td><td>4%</td><td>9%</td><td>8%</td><td>3%</td><td>2%</td></tr>
<tr><td>Unlikely</td><td rowspan="2">3%</td><td>4%</td><td rowspan="2">9%</td><td>1%</td><td rowspan="2">5%</td><td>2%</td><td rowspan="2">2%</td><td>2%</td></tr>
<tr><td>Very Unlikely</td><td>0%</td><td>0%</td><td>0%</td><td>0%</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]

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2022	2023	2022	2023	2022	2023	2022	2023
Very Likely	64%	40%	95%	59%	85%	49%	85%	67%
Likely		32%		33%		36%		25%
Unsure/don't know	30%	20%	4%	8%	13%	13%	12%	7%
Unlikely	6%	7%	1%	0%	2%	2%	3%	1%
Very Unlikely		1%		0%		0%		0%

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

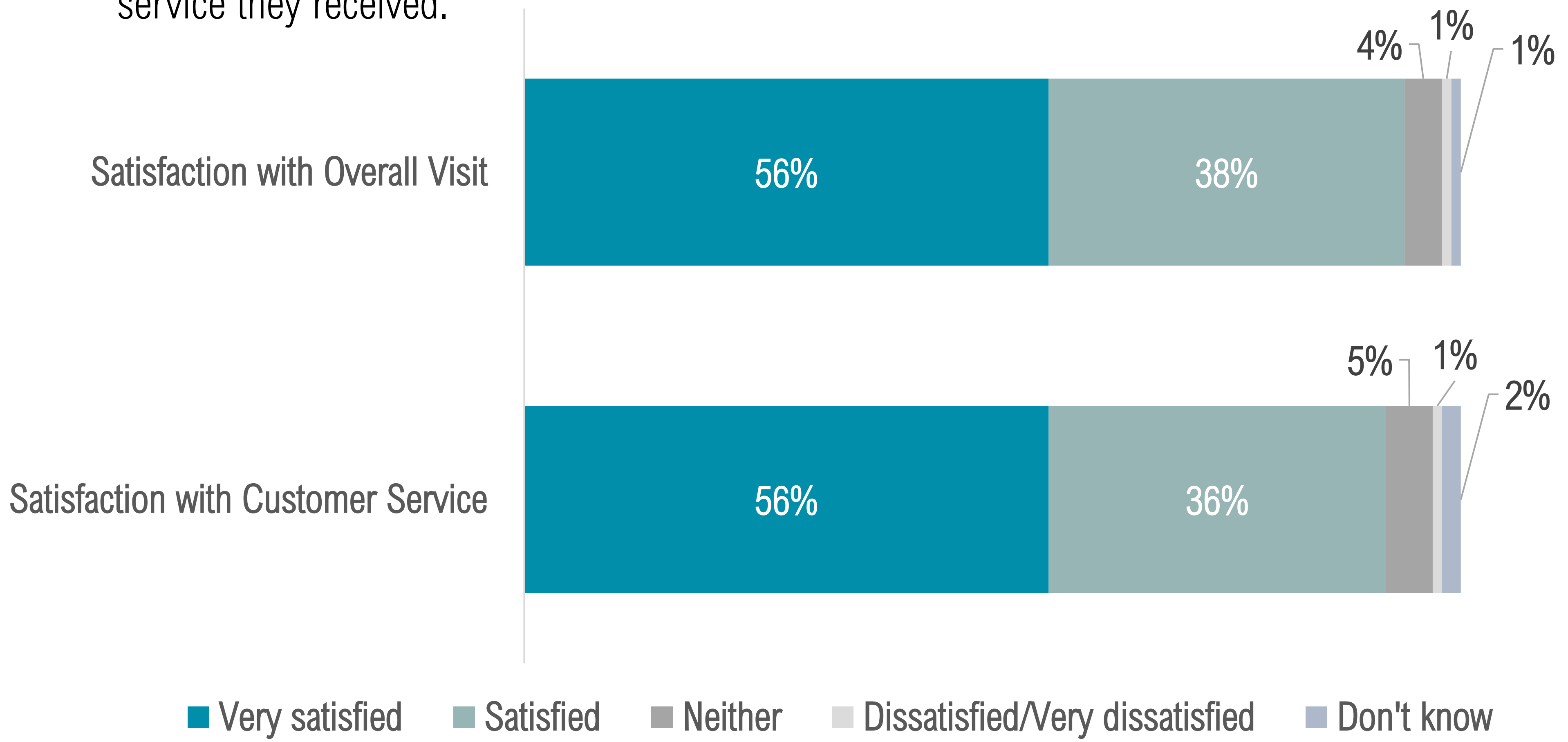
CROSSTABULATIONS: LIKELIHOOD OF RETURNING NEXT YEAR[1]

<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">42%</td><td>35%</td><td rowspan="2">84%</td><td>55%</td><td rowspan="2">65%</td><td>46%</td><td rowspan="2">82%</td><td>60%</td></tr>
<tr><td>Likely</td><td>16%</td><td>19%</td><td>20%</td><td>21%</td></tr>
<tr><td>Unsure/don’t know</td><td>47%</td><td>44%</td><td>13%</td><td>24%</td><td>29%</td><td>31%</td><td>18%</td><td>19%</td></tr>
<tr><td>Unlikely</td><td rowspan="2">11%</td><td>4%</td><td rowspan="2">3%</td><td>1%</td><td rowspan="2">6%</td><td>2%</td><td rowspan="2">0%</td><td>0%</td></tr>
<tr><td>Very Unlikely</td><td>1%</td><td>1%</td><td>1%</td><td>0%</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.



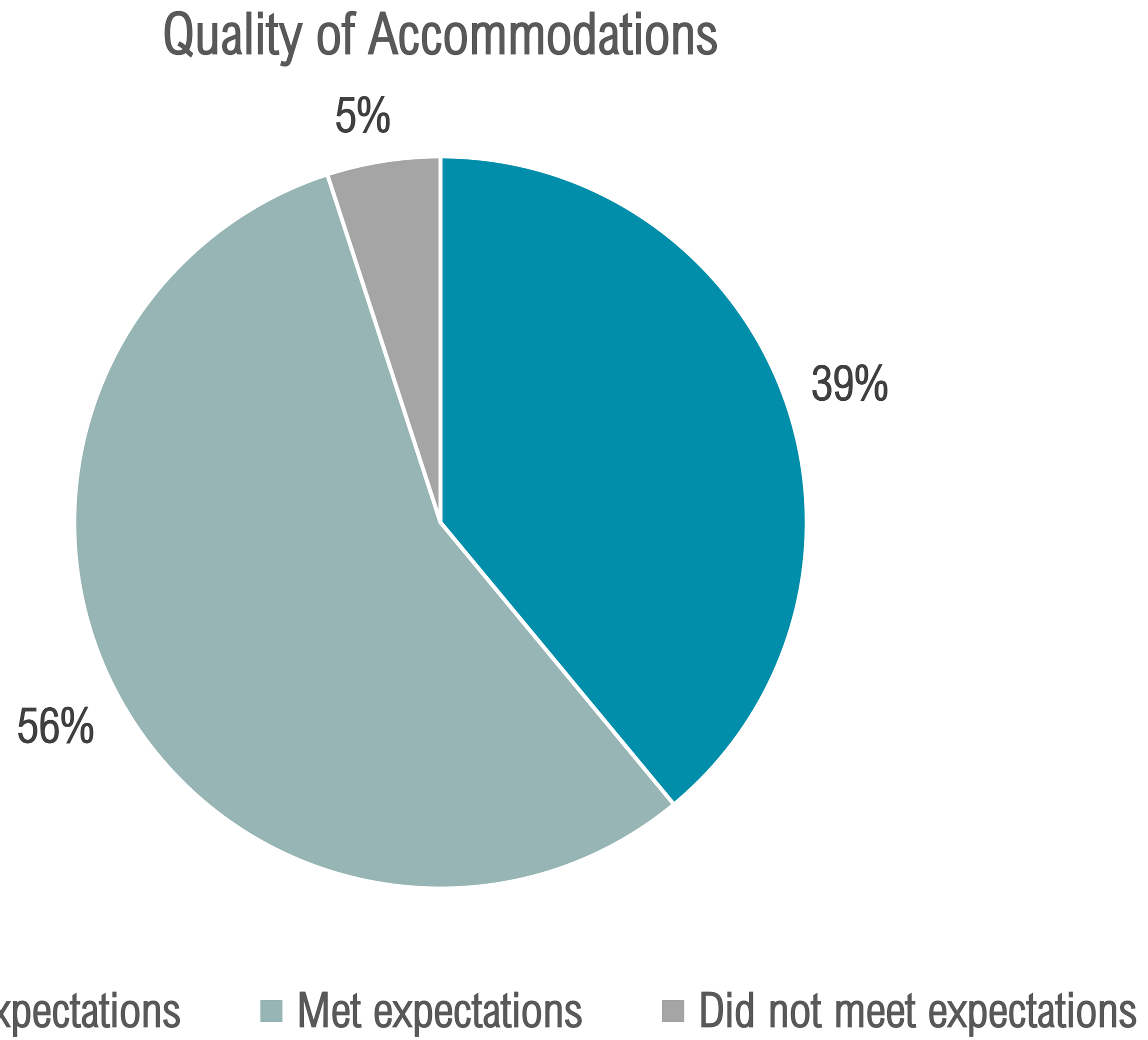
CROSSTABULATIONS: SATISFACTION WITH OVERALL VISIT

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2022	2023	2022	2023	2022	2023	2022	2023
Very Satisfied	42%	53%	58%	59%	46%	56%	59%	62%
Satisfied	49%	37%	30%	36%	43%	38%	38%	31%
Unsure/don't know	7%	6%	12%	5%	10%	5%	3%	6%
Dissatisfied	1%	3%	0%	0%	1%	1%	0%	1%
Very Dissatisfied	1%	1%	0%	0%	0%	0%	0%	0%

CROSSTABULATIONS: SATISFACTION WITH SERVICE

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2022	2023	2022	2023	2022	2023	2022	2023
Very Satisfied	43%	57%	54%	59%	46%	57%	58%	60%
Satisfied	42%	33%	31%	35%	41%	35%	33%	34%
Unsure/don't know	13%	5%	15%	5%	12%	6%	9%	5%
Dissatisfied	1%	4%	0%	1%	1%	2%	0%	1%
Very Dissatisfied	1%	1%	0%	0%	0%	0%	0%	0%

SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

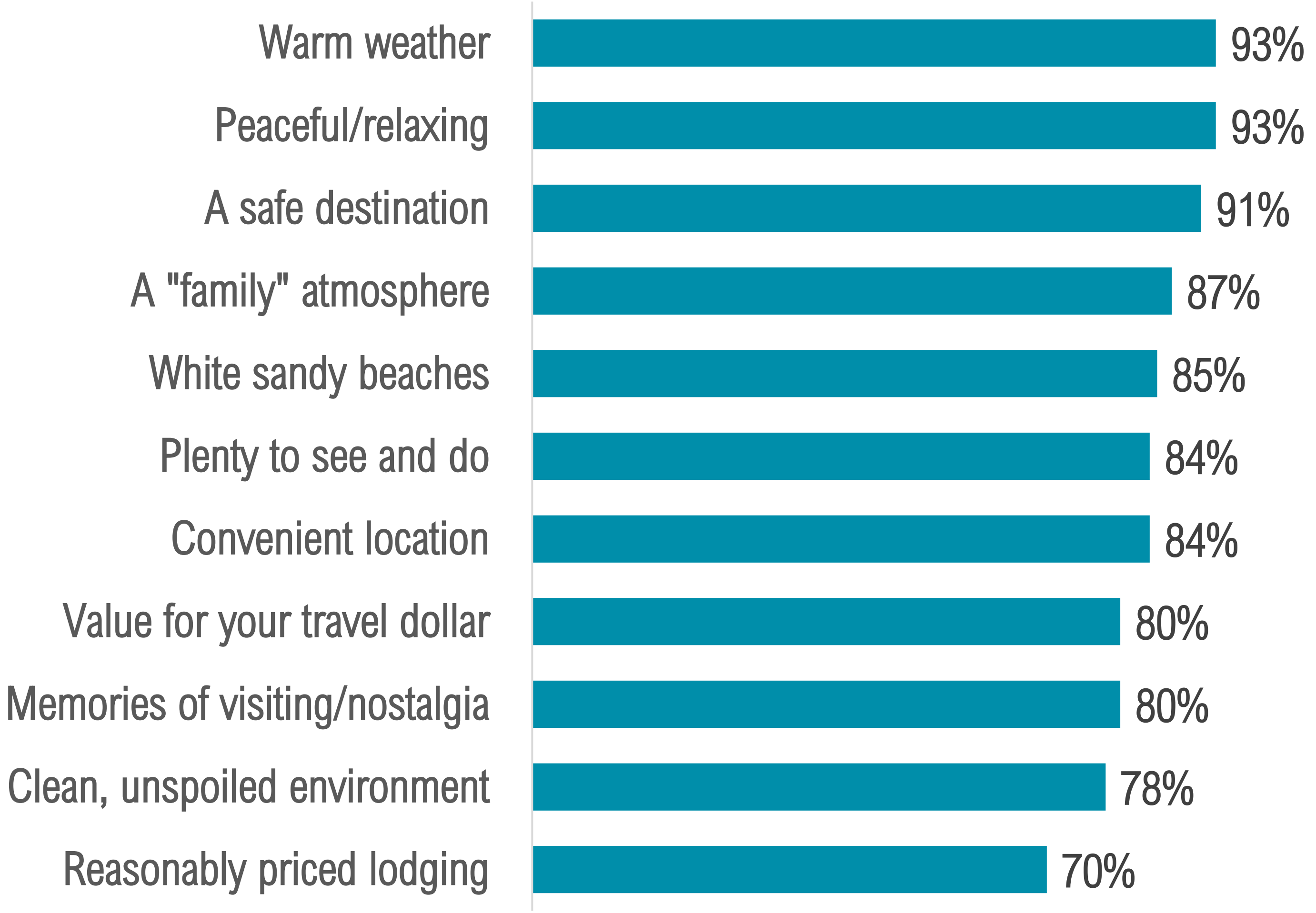


SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

	1st Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2022	2023	2022	2023	2022	2023	2022	2023
Exceeded Expectations	37%	39%	30%	38%	28%	37%	59%	43%
Met Expectations	60%	53%	69%	59%	70%	58%	38%	49%
Did Not Meet Expectations	3%	8%	1%	3%	2%	5%	3%	8%

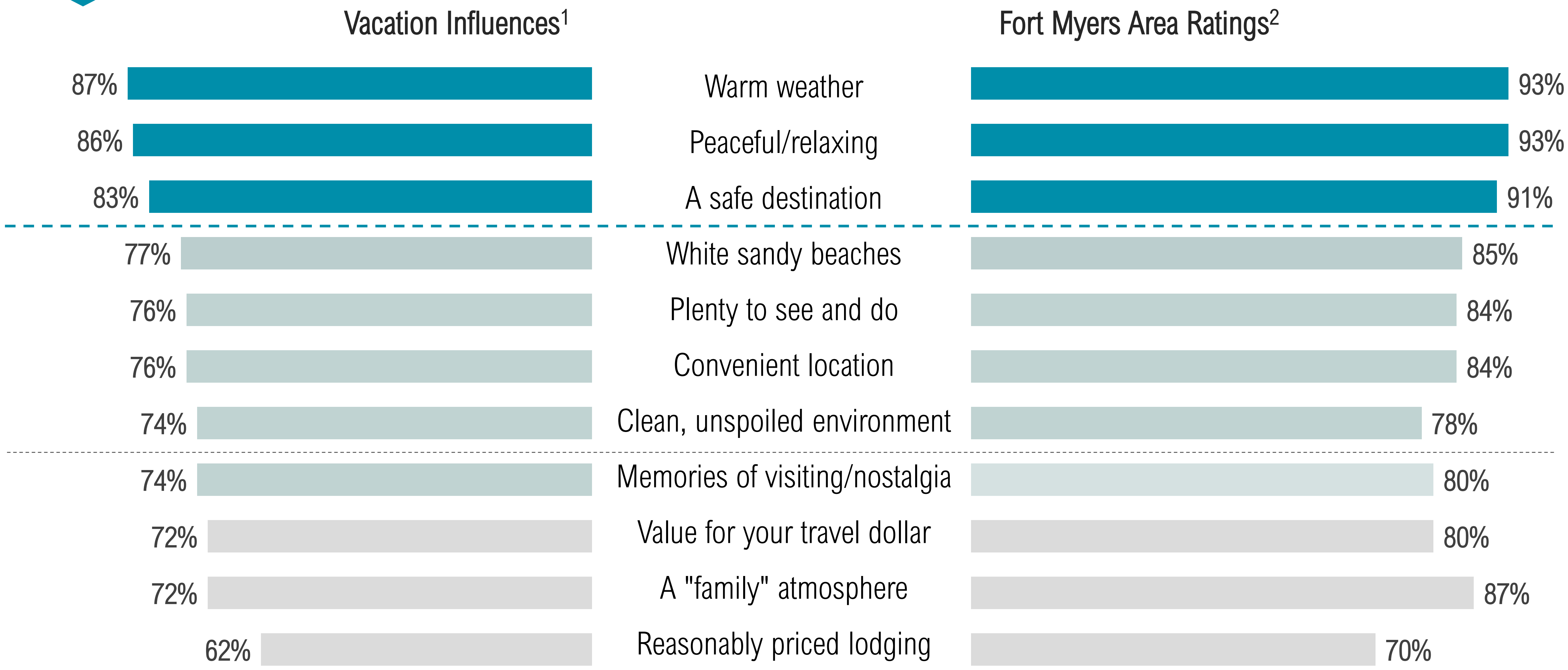
ATTRIBUTE RATINGS[1]

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



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

VACATION ATTRIBUTE INFLUENCE VS. RATINGS



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

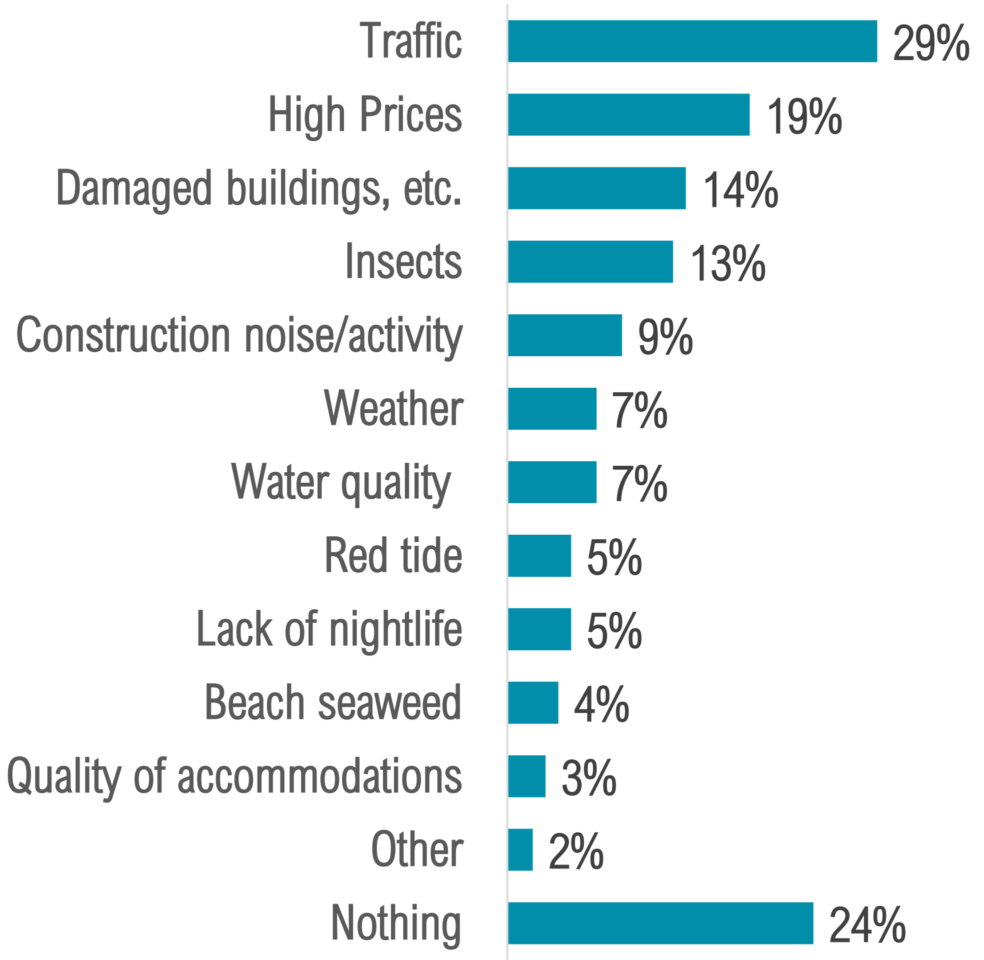
Post-Trip Evaluation
Oct - Dec 2023

fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

downs & st. germain RESEARCH

LEAST LIKED FEATURES[1]

Over 1 in 4 visitors mentioned traffic, while under 1 in 5 were concerned with hurricane damage, and another 24% had no concerns at all during their visit.



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

AREA DESCRIPTIONS

Peaceful & Relaxing

- "It's peaceful and serene, with good restaurants and great weather."
- "We've had a very peaceful and relaxing time visiting relatives and spending time on the gorgeous beaches."
- "We enjoyed a wonderful reunion with some family and some old friends in a peaceful and laid-back environment."

A Safe Destination

- "It's nice and safe, the beaches are great, there's a real Florida feeling about the area".
- "There's lots to do, in a safe environment, and with tons of restaurant options."
- "Fun, beautiful, clean, safe, and the list goes on. What more could you ask for?"
- "Great spot with a nice and safe family environment."

AREA DESCRIPTIONS

"Family" Atmosphere

- "Great destination for a vacation, especially one with family or a close group of friends."
- "Great family destination with tons to do and it's not too crowded either."
- "Perfect place for family and relatives to have a reunion with great weather, tons of sunshine, and beautiful sunsets by the beach."
- "It's a great place to go with the family to relax and unwind. The people are nice, and we still really enjoy the area even after the damage from Ian."

Warm Weather

- "It's always an incredible time to come and enjoy the beautiful sandy beaches, palm trees, warm weather, and endless sunshine."
- "Nice area with warm weather nearly year-round and plenty of great places available to stay at."
- "Warm, very warm, which I love. We come down to escape the harsh winters of Michigan back home."

OCCUPANCY BAROMETER[1]: JAN - MAR RESERVATIONS

Jan – Mar Reservations	Jan – Mar 2023	Jan - Mar 2024
Up	38%	41%
Same	34%	26%
Down	28%	33%

[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?"

OCCUPANCY BAROMETER[1]: APR - JUN RESERVATIONS

Apr – Jun Reservations	Apr - Jun 2023	Apr - Jun 2024
Up	28%	29%
Same	35%	16%
Down	37%	55%

[1]Sources: Occupancy Survey
Accommodations partners were asked the following, “Please think about your reservations for the next three months. Compared to April - June 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	Oct - Dec 2022	Oct - Dec 2023	% Change '22 – '23
Visitors	486,300	806,000	+ 65.8%
Visitor Days	3,794,500	4,715,100	+ 24.3%
Room Nights	866,600	1,016,400	+ 17.3%
Direct Expenditures[1]	$521,691,700	$658,633,800	+ 26.2%
Total Economic Impact[2]	$831,054,900	$1,054,472,700	+ 26.9%
Occupancy	54.3%	55.2%	+1.6%
ADR	$168.13	$154.89	-7.9%
RevPAR	$91.34	$85.53	-6.4%

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

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM[1]

	Oct - Dec 2022	Oct - Dec 2023	% Change '22 – '23
Direct Jobs[2]	5,700	7,470	31.1%
Total Jobs[3]	7,630	9,980	30.8%
Direct Wages[2]	$190,816,600	$244,543,900	28.2%
Total Wages[3]	$271,313,600	$348,397,800	28.4%
Direct Local Taxes[2]	$12,219,000	$14,012,400	14.7%
Total Local Taxes[3]	$16,643,900	$19,671,700	18.2%
Direct State Taxes[2]	$21,439,000	$24,625,200	14.9%
Total State Taxes[3]	$29,342,300	$34,732,300	18.4%

[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	Oct - Dec 2022	Oct - Dec 2023
Visitors in Paid Accommodations	59%	69%
Visitors in Non-Paid Accommodations	38%	29%
Day Trippers	2%	2%

PRE-VISIT

Planned trip in advance	Oct - Dec 2022	Oct - Dec 2023
1 week or less	8%	5%
2-4 weeks	16%	13%
1-2 months	26%	33%
3-6 months	30%	32%
6 months or more	17%	15%
Not sure	3%	2%

Considered Other Destinations	Oct - Dec 2022	Oct - Dec 2023
Yes	22%	27%
No	78%	73%

PRE-VISIT

Other destinations considered[1]	Oct - Dec 2022[2]	Oct - Dec 2023[2]
Tampa/Clearwater/St.Pete	14%	18%
Orlando	12%	15%
Miami/Ft. Lauderdale	14%	15%
Sarasota/Siesta Key	9%	13%
Naples/Marco Island	9%	13%
Keys/Key West	18%	13%
Daytona Beach	9%	10%
West Palm Beach	8%	6%
Punta Gorda/Englewood	2%	4%
Other destinations in FL	17%	13%
Other destinations outside of FL	14%	17%

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

PRE-VISIT

Trip Planning Websites/Apps[1]	Oct - Dec 2022	Oct - Dec 2023
Airline websites/apps	29%	32%
Online search engines	26%	25%
Airbnb, VRBO, HomeAway etc.	19%	17%
Hotel websites/apps	17%	17%
Booking websites	17%	16%
Trip Advisor	12%	14%
Vacation rental websites/apps	11%	11%
Visit Florida	9%	8%
Facebook	8%	7%
www.VisitFortMyers.com	9%	7%
Traveler reviews, blogs, stories	10%	7%
VCB Facebook Page	9%	6%
Instagram	4%	3%
YouTube, Hulu, Pandora	3%	3%
Other	4%	4%
None	24%	23%

[1]Multiple responses permitted.

PRE-VISIT

Information Requests[1]	Oct - Dec 2022	Oct - Dec 2023
Calling a hotel, motel, condo	23%	23%
Requesting and receiving a visitor guide	9%	9%
Calling the VCB	3%	2%
Receiving the VCB e-newsletter	4%	2%
Calling a local Chamber of Commerce	3%	2%
Other	2%	2%
None	66%	70%

[1]Multiple responses permitted.

PRE-VISIT

Recall of Lee County Promotions	Oct - Dec 2022	Oct - Dec 2023
Yes	40%	38%
No	46%	43%
Can't recall	14%	19%
% of recallers influenced by promotions	52%	49%
% of total visitors influenced by promotions	21%	19%

PRE-VISIT

Type of Promotions Recalled[1]	Oct - Dec 2022[2]	Oct - Dec 2023[3]
Internet	47%	49%
Social media	35%	33%
Traveler reviews, blogs	20%	16%
Television	16%	13%
Magazine	6%	9%
www.VisitFortMyers.com	10%	9%
Newspaper	7%	7%
Travel/visitor guide	8%	7%
Video streaming services	-	7%
Email/e-newsletter	-	6%
AAA	5%	5%
Brochure	4%	4%
Billboard	2%	3%
Radio	6%	3%
Deal-based promotion	4%	3%
Music streaming services	-	1%
Podcasts	-	1%
Other	5%	4%

[1]Multiple responses permitted.
[2]Base: 40% of visitors who recalled seeing a promotion.
[3]Base: 38% of visitors who recalled seeing a promotion.

PRE-VISIT

Characteristics influencing decision to visit Lee County (top 2 boxes)[1]	Oct - Dec 2022	Oct - Dec 2023
Warm weather	85%	87%
Peaceful/relaxing	82%	86%
A safe destination	79%	83%
White sandy beaches	65%	77%
Plenty to see and do	72%	76%
Convenient location	67%	76%
Clean, unspoiled environment	68%	74%
Memories of visiting/nostalgia	-	74%
A "family" atmosphere	69%	72%
Value for your travel dollar	67%	72%
Reasonably priced lodging	60%	62%

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

PRE-VISIT

Main Reason for Visiting[1]	Oct - Dec 2022	Oct - Dec 2023
Relax & unwind	30%	38%
Visiting friends & relatives	38%	31%
Beach	13%	27%
Checking-in on my property post-hurricane	16%	11%
Golf or tennis	8%	10%
Part-time resident ("Snowbird")	1%	9%
Special event	3%	8%
Business meetings/conferences	5%	8%
Shopping	13%	8%
Special occasion	8%	7%
Fishing	7%	6%
Nature, environment, bird watching	5%	6%
Water sports	4%	6%
Sporting event	2%	5%
Work-related hurricane recovery	11%	5%
Attractions	3%	4%
Photography	4%	4%
Volunteering	11%	4%
Biking, hiking	2%	2%
Guided tours	1%	2%
Culture	2%	1%
Museums, history	1%	1%
Diving, snorkeling	2%	1%
Other	1%	4%

[1]Multiple responses permitted.

PRE-VISIT

Transportation	Oct - Dec 2022	Oct - Dec 2023
Fly	61%	69%
Drive a personal vehicle	28%	21%
Drive a rental vehicle	8%	6%
Drive a RV	2%	2%
Travel by bus	<1%	<1%
Other	1%	2%

Airport Used	Oct - Dec 2022	Oct - Dec 2023
Southwest Florida International	83%	84%
Punta Gorda	7%	7%
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]	Oct - Dec 2022	Oct - Dec 2023
Florida	12.3%	6.7%
Southeast	19.5%	20.2%
Northeast	17.3%	19.3%
Midwest	28.8%	32.1%
West	10.1%	8.5%
Canada	5.8%	6.4%
United Kingdom	1.0%	1.3%
Germany	3.2%	3.6%
Other Europe	0.9%	1.0%
Other International	1.1%	0.9%

Visitor Origin[1]	Oct - Dec 2022	Oct - Dec 2023
NEW YORK	4%	5%
ATLANTA	3%	4%
CHICAGO	3%	4%
DETROIT	2%	3%
MINNEAPOLIS-SAINT PAUL	2%	3%
PHILADELPHIA	3%	3%

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

TRAVEL PARTY PROFILE

Travel Parties	Oct - Dec 2022	Oct - Dec 2023
Mean travel party size[1]	2.8	2.9
Travel with children under age 18	31%	32%

Travel Party Composition	Oct - Dec 2022	Oct - Dec 2023
As a family	32%	36%
As a couple	34%	34%
By yourself	21%	15%
With other couples/friends	6%	8%
With business associates	6%	5%
In a tour group	<1%	<1%
Other	1%	2%

[1]Sources: Occupancy Study and Visitor Tracking Study

TRAVEL PARTY PROFILE

Marital Status	Oct - Dec 2022	Oct - Dec 2023
Married/Domestic Partnership	72%	75%
Single	28%	25%

Age	Oct - Dec 2022	Oct - Dec 2023
Average age	51	50
Median age	50	50

Household Income	Oct - Dec 2022	Oct - Dec 2023
Median Income	$108,800	$103,300

TRAVEL PARTY PROFILE

Race/Ethnicity	Oct - Dec 2022	Oct - Dec 2023
Caucasian/White	71%	74%
Hispanic/Latino/Latina/Latinx	15%	14%
African American/Black	8%	5%
Asian/Asian American/Pacific Islander	3%	3%
Middle Eastern/Northern African	1%	2%
Another race/ethnicity	2%	2%

Gender[1]	Oct - Dec 2022	Oct - Dec 2023
Female	56%	50%
Male	44%	50%
Non-binary	<1%	<1%

[1]Of person interviewed.

TRIP EXPERIENCE

Length of Stay[1]	Oct - Dec 2022	Oct - Dec 2023
Average nights in the Fort Myers area	7.8	5.9

First Time/Repeat Visitors	Oct - Dec 2022	Oct - Dec 2023
First-time	26%	27%
Repeat	74%	73%

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

TRIP EXPERIENCE

Type of Accommodations	Oct - Dec 2022	Oct - Dec 2023
Not spending the night	3%	2%
Hotel/motel/resort	39%	38%
Vacation rental home	14%	27%
Personal condo/second home	18%	15%
Friends/family home	20%	14%
Bed & Breakfast/Inn	1%	1%
Campground/RV Park	3%	2%
Other	2%	1%

TRIP EXPERIENCE

Activities[1]	Oct - Dec 2022	Oct - Dec 2023
Relax and unwind	61%	61%
Restaurants	69%	60%
Beach	26%	50%
Visit friends/relatives	49%	43%
Shopping	49%	41%
Nature, environment, bird watching	19%	23%
Fishing	18%	21%
Bars, nightclubs	20%	17%
Water sports	14%	17%
Biking, hiking	19%	14%
Golf, tennis, or pickleball	17%	14%
Attractions	10%	12%
Photography	11%	10%
Special occasion	8%	9%
Business meetings/conferences	5%	9%
Special events	8%	8%
Museums, history	8%	8%
Culture	9%	7%
Attend or participate in a sporting event	3%	6%
Spas	6%	6%
Diving, snorkeling	6%	6%
Guided tours	4%	6%
Volunteering	13%	5%
Other	2%	2%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Attractions[1]	Oct - Dec 2022	Oct - Dec 2023
Beaches	32%	49%
Bell Tower Shops	28%	23%
Miromar Outlets Mall	38%	21%
Edison & Ford Winter Estates	25%	19%
Gulf Coast Town Center	30%	19%
Coconut Point Mall	26%	17%
Sanibel Lighthouse[4]	0%	15%
Shell Factory and Nature Park	16%	14%
Fort Myers Beach Pier[2]	0%	12%
J.N. Ding Darling National Wildlife Refuge[4]	0%	7%
Manatee Park	7%	6%
Bailey-Matthews Shell Museum[4]	0%	5%
Broadway Palm Dinner Theater	5%	3%
Barbara B. Mann Performing Arts Hall	2%	2%
Sanibel Outlets[3]	0%	0%
Periwinkle Placemana[3]	0%	0%
Other	7%	5%
None	22%	15%

[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.
[4]Was closed at the time due to Hurricane Ian.

TRIP EXPERIENCE

Area stayed	Oct - Dec 2022	Oct - Dec 2023
Fort Myers	48%	39%
Cape Coral	13%	14%
Fort Myers Beach	7%	12%
Bonita Springs	12%	10%
Estero	7%	8%
Sanibel Island	1%	6%
North Fort Myers	5%	3%
Captiva Island	<1%	2%
Lehigh Acres	1%	1%
Pine Island	<1%	1%
Boca Grande/Outer Islands	1%	1%
Along I-75	2%	1%
None/not staying overnight	3%	2%

POST-TRIP EVALUATION

Likelihood of Recommending the Area	Oct - Dec 2022	Oct - Dec 2023
Very Likely	87%	44%
Likely		46%
Unsure/don't know	5%	8%
Unlikely	8%	2%
Very Unlikely		<1%

Likelihood of Returning to the Area	Oct - Dec 2022	Oct - Dec 2023
Very Likely	85%	51%
Likely		34%
Unsure/don't know	2%	13%
Unlikely	13%	2%
Very Unlikely		0%

Likelihood of Returning Next Year	Oct - Dec 2022	Oct - Dec 2023
Very Likely	66%	48%
Likely		20%
Unsure/don't know	5%	29%
Unlikely	29%	2%
Very Unlikely		1%

POST-TRIP EVALUATION

Satisfaction with Accommodations	Oct - Dec 2022	Oct - Dec 2023
Exceeded expectations	36%	39%
Met expectations	61%	56%
Did not meet expectations	3%	5%

Felt Welcomed in the Fort Myers Area	Oct - Dec 2022	Oct - Dec 2023
Yes	95%	95%

POST-TRIP EVALUATION

Satisfaction with Visit	Oct - Dec 2022	Oct - Dec 2023
Very satisfied	48%	56%
Satisfied	42%	38%
Neither	8%	4%
Dissatisfied	1%	1%
Very dissatisfied	0%	0%
Don't know/no opinion	1%	1%

Satisfaction with Customer Service	Oct - Dec 2022	Oct - Dec 2023
Very satisfied	48%	56%
Satisfied	40%	36%
Somewhat satisfied	9%	5%
Dissatisfied	0%	1%
Very dissatisfied	0%	0%
Don't know/no opinion	3%	2%

POST-TRIP EVALUATION

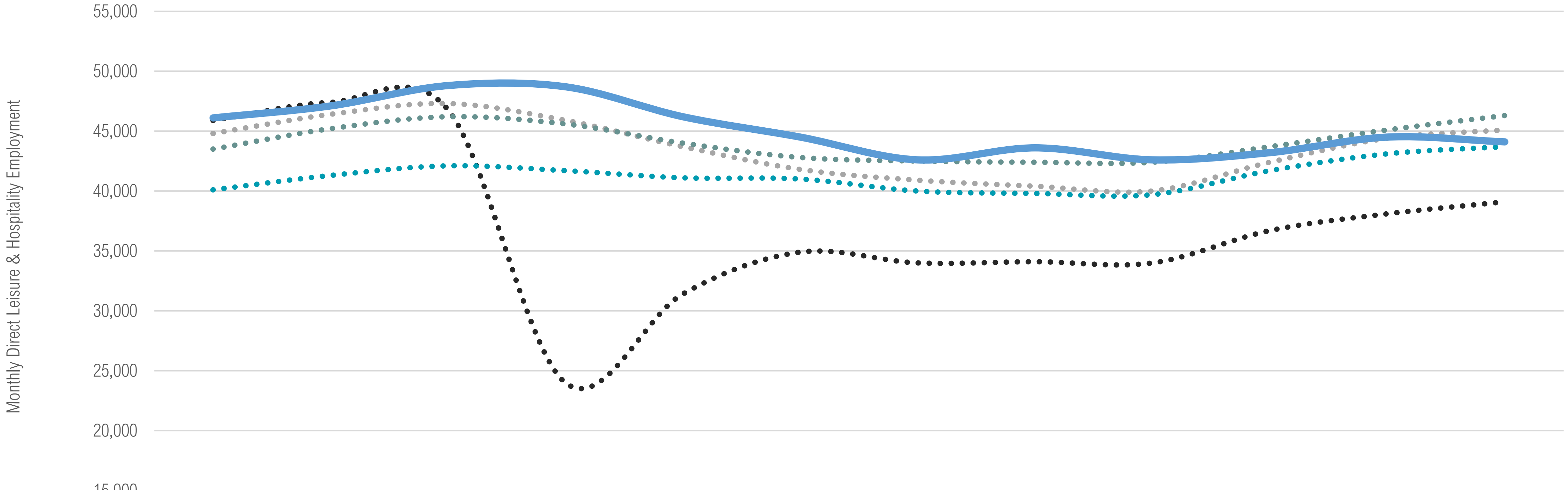
Visitor Concerns[1]	Oct - Dec 2022	Oct - Dec 2023
Traffic	37%	29%
High Prices	15%	19%
Damaged buildings, signs, and landscapes	11%	14%
Insects	12%	13%
Construction noise/activity	-	9%
Weather	8%	7%
Water quality	11%	7%
Red tide	10%	5%
Lack of nightlife	4%	5%
Beach seaweed	3%	4%
Quality of accommodations	2%	3%
Other	<1%	2%
Nothing	21%	24%

[1]Multiple responses permitted.

Industry Data

LEISURE & HOSPITALTY EMPLOYMENT

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

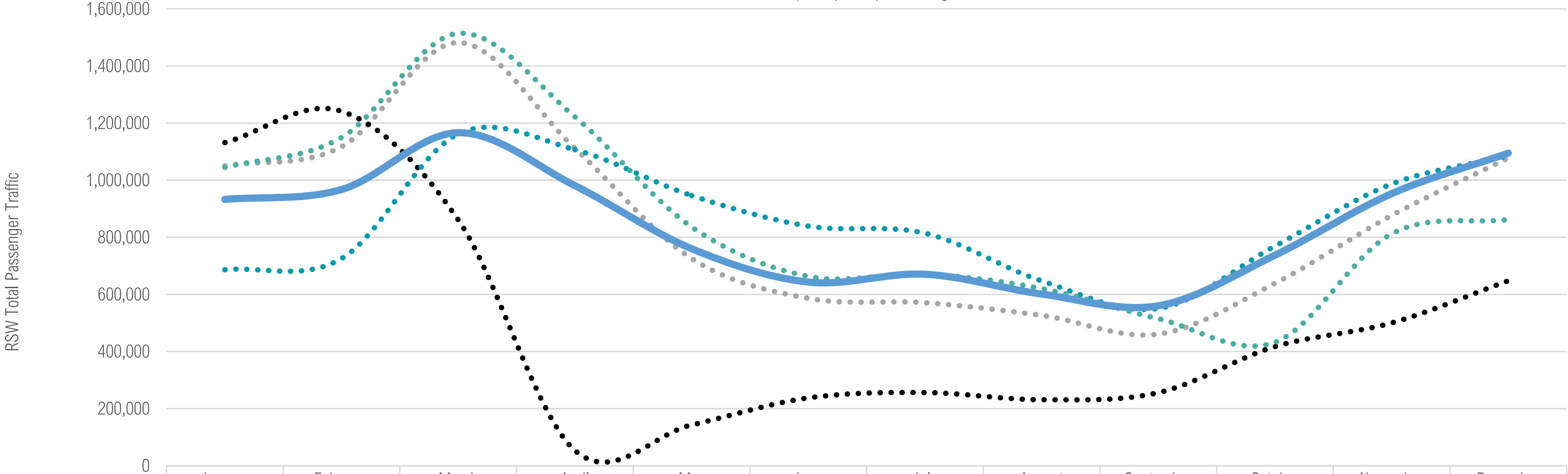


	January	February	March	April	May	June	July	August	September	October	November	December
2019	44,800	46,400	47,300	45,900	43,700	41,800	40,900	40,400	40,000	42,400	44,400	45,100
2020	45,900	47,400	46,800	24,000	31,400	34,900	34,000	34,100	34,000	36,700	38,100	39,100
2021	40,100	41,300	42,100	41,700	41,100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

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

RSW PASSENGER TRAFFIC

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



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

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

LICENSED TRANSIENT RENTAL UNITS

Licensed Transient Rental Units in Lee County, as of January 2024[1]					
	Hotel	Motel	Bed & Breakfast	Vacation Rental	Total
Fort Myers	5,309	1,450	9	533	7,301
Fort Myers Beach	999	553	0	1,910	3,462
Cape Coral	584	204	6	2,446	3,240
Sanibel	68	780	0	1,701	2,549
Bonita Springs	1,244	38	0	516	1,798
Captiva	107	166	0	317	590
Estero	566	0	0	26	592
North Fort Myers	0	325	0	50	375
Boca Grande	77	107	0	267	451
Lehigh Acres	75	0	0	187	262
Saint James City	0	20	0	52	72
Bokeelia	0	31	0	38	69
Matlacha	0	0	2	27	29
Cabbage Key	0	9	0	0	9
Iona	0	0	0	1	1
Pineland	0	0	0	1	1
Miromar Lakes	0	0	0	1	1
Alva	0	0	0	1	1
Total	**9,029**	**3,683**	**17**	**8,074**	**20,803[2]**

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

Methodology

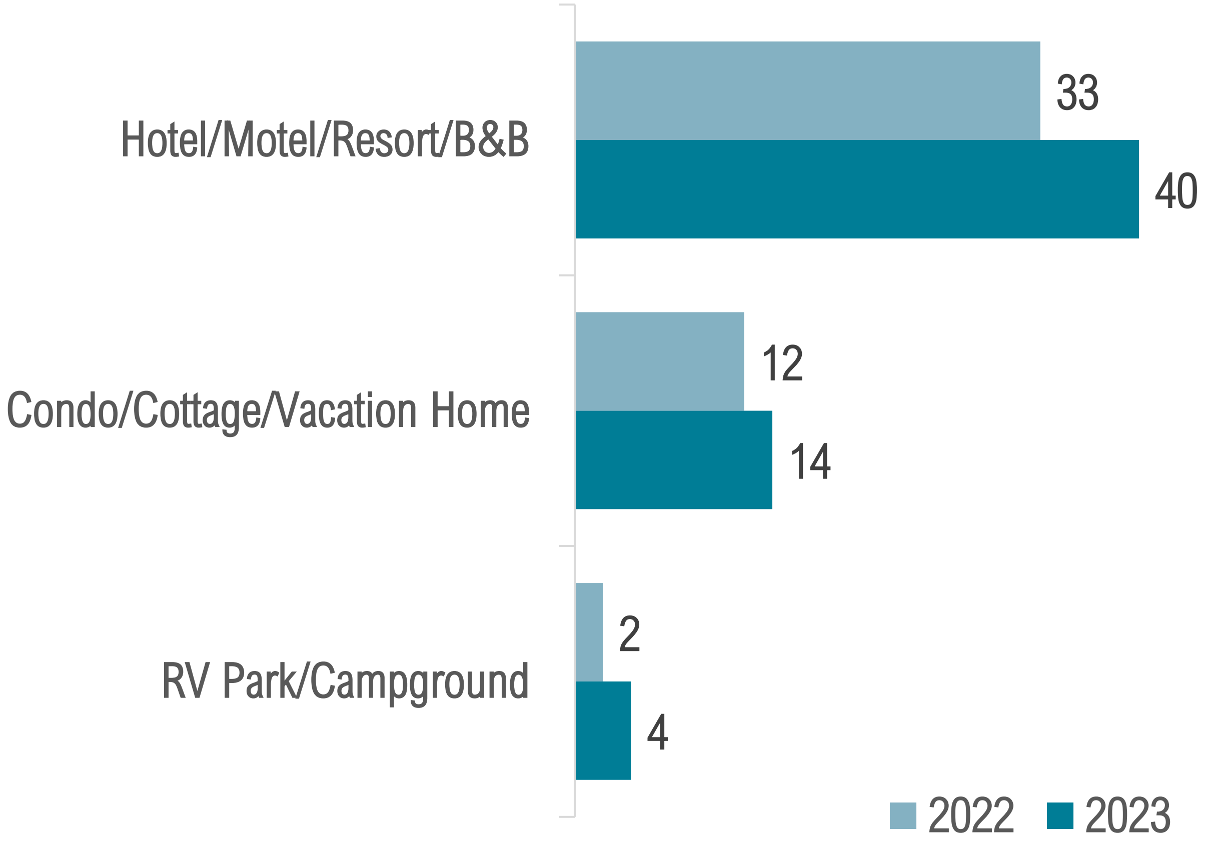
METHODOLOGY

- 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: October - December visitors to Lee County
    - Data Collection: October - December 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 6,673 hotel/rental/campground units (58 properties) reporting to DSG, 8,901 hotel units reporting to STR (75 properties), and 3,143 rental units (29 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 – 58 completed surveys
    - Data Collection: Completed in January (for Oct - December 2023)
  - Total Sample Size – data from 6,673 hotel/rental/campground units reporting to DSG, 8,901 hotel units reporting to STR (representing 75 properties), and 3,143 rental units reporting to KeyData (representing 29 properties)

Number of Complete Responses



Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

Oct - Dec 2023

Visitor Tracking, Occupancy, & Economic Impact Study

Tamara Pigott, CDME
Executive Director

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