Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

Calendar Year 2023

Visitor Tracking, Occupancy & Economic Impact Study

Downs & St. Germain Research

Introduction

STUDY OBJECTIVES: MAP THE VISITOR JOURNEY

Pre-Visit

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

Travel Party Profile

- Visitor origin
- Party size
- Party composition
- Demographics

Trip Experience

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

Post-Trip Evaluation

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

Economic Impact on Destination

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

Executive Summary

ANNUAL SNAPSHOT

- In 2023, lodging metrics including Occupancy, ADR, & RevPAR all saw large decreases compared to 2022. This is partly due to ongoing normalization being observed across Florida, but also due to the impact of Hurricane Ian.
- The share of international visitors increased to 12.1% in 2023, with Canada and Germany as the leading international visitor origins, at 6.6% and 2.4%, respectively.

57.5%	$158.69	$91.29
OCCUPANCY RATE	**AVERAGE DAILY RATE**	**REVENUE PER ROOM**
↓ 15.5% from 2022	↓ 19.7% from 2022	↓ 32.1% from 2022

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

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

DIRECT SPENDING

Visitors who traveled to the Fort Myers area in CY 2023 spent

$2,894,033,400

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

A decrease of **26.8%**.

TOURISM MATTERS TO LEE COUNTY

Visitor spending in CY 2023 generated
a total economic impact of

$4,633,347,500

in the Fort Myers area.

A decrease of 26.4%.

VISITORS

The Fort Myers area attracted

2,976,200

visitors in CY 2023.

A decrease of **29.2%**.

ROOM NIGHTS

The Fort Myers area visitors generated

4,315,100

room nights in paid accommodations in CY 2023.

A decrease of **26.4%**.

TOURIST DEVELOPMENT TAX

Paid accommodations and vacation rentals by visitors to the Fort Myers area in CY 2023 generated

$37,198,900

in TDT collected

A decrease of 38.9%.

JOBS & WAGES

Tourism in the Fort Myers area supported

48,200 (-30.5%)

local jobs in CY 2023, generating

$1,493,744,900 (-24.5%)

in wages and salaries.

VISITORS SUPPORT JOBS

An additional Lee County job
is supported by every

62

visitors

HOUSEHOLD SAVINGS[1]

Visitors to the Fort Myers area
saved local residents

$1,004

per household in CY 2023
in state and local taxes

CALENDAR YEAR LODGING STATISTICS

57.5%	$158.69	$91.29
Occupancy	ADR	RevPAR
↓ 15.5%	↓ 19.7%	↓ 32.1%

VISITOR JOURNEY: PRE-VISIT

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

TRIP PLANNING

- → **Over half** of visitors planned their trip to the Fort Myers area 2 months or less in advance
- → **1 in 3** visitors requested information from local organizations to plan their trips
  - → **1 in 4 visitors** called a hotel, motel, or condo directly when planning their trips
- → **39%** of visitors considered choosing other destinations when planning their trips

TRIP PLANNING: TOP WEBSITES USED

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

30% Airline websites

28% Search engines

VRBO® from HomeAway®

19% Airbnb, VRBO, HomeAway, or similar website

[1]Multiple responses permitted.

TOP TRIP INFLUENCERS

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

87% Warm weather

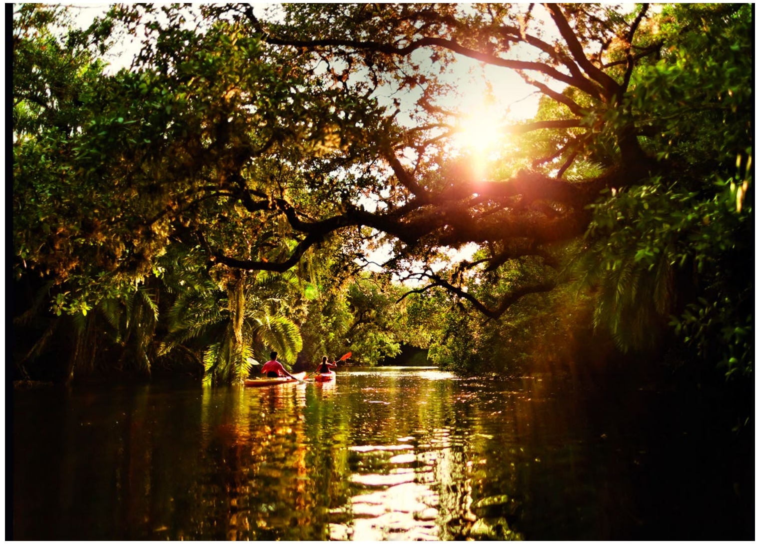
87% Peaceful/relaxing

83% Safe destination

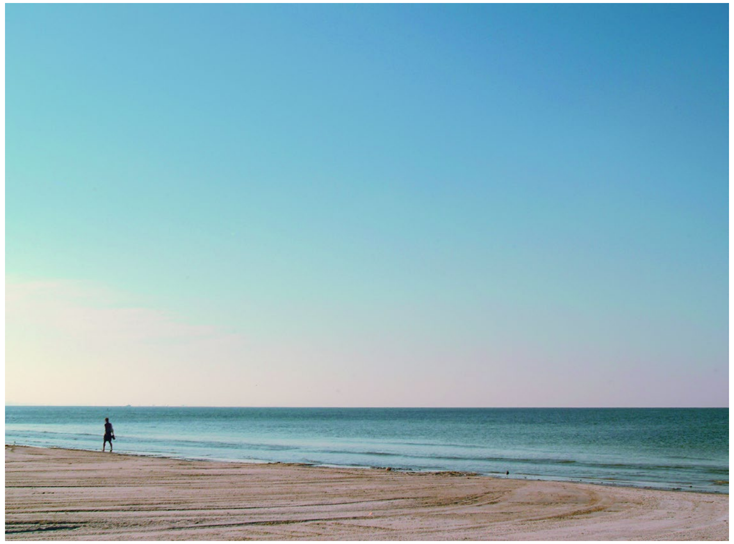
[1]Top 2 box scores. Attributes rated on a scale from 1 to 5 where 1 is Not at All Influential and 5 is Definitely Influential.

TOP REASONS FOR VISITING

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



38% Relax & unwind



28% Beach

28% Visiting friends/relatives

[1]Three responses permitted.

PROMOTIONS

- 43% of visitors **recalled promotions** in the past 6 months for the Fort Myers area
- **Promotions influenced 21%** of all visitors to come to the Fort Myers area
- Top sources of recall include[1]:

49%[2] Internet

36%[2] Social media

[1] Multiple responses permitted.
[2] Base = 43%.

BOOKING

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

42% Directly with hotel/condo

18% Other online travel agency

15% VRBO, HomeAway

15% Airbnb

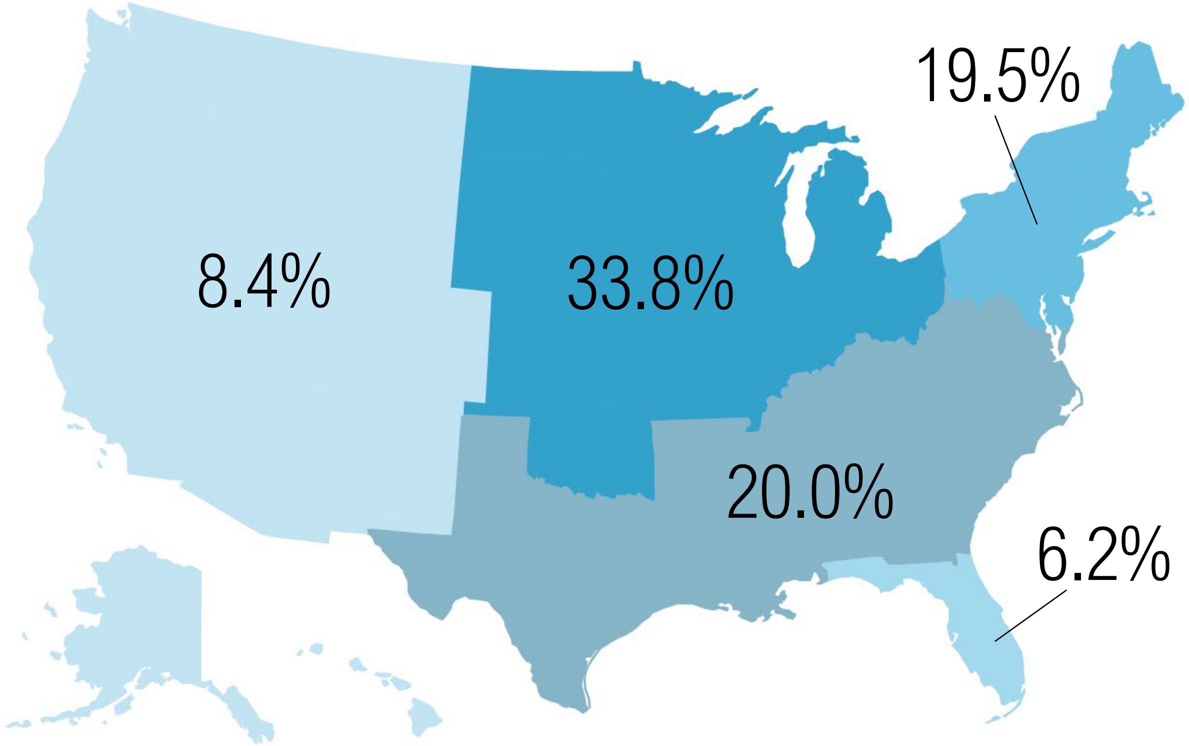
7% Vacation rental company

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 = 87.9%

Canada – 6.6%

Germany – 2.4%

3.1% 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]

6% New York

4% Chicago

4% Atlanta

[1]Sources: Data from Visitor Tracking Survey

TRAVEL PARTY SIZE AND COMPOSITION

- Visitors traveled in a party composed of 2.9 people[1]
- 35% traveled with children under the age of 18
- 41% traveled as a family

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

DEMOGRAPHIC PROFILE

CY 2023 Visitors:

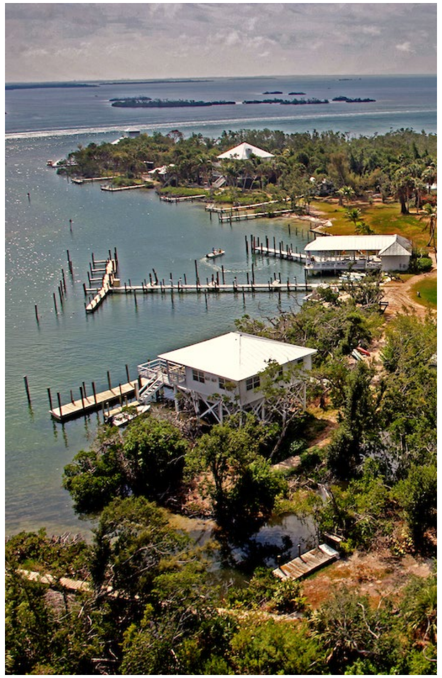
- Median age of 50 years old
- Median household income of $108,000
- Married (74%)
- College educated (67%)
- Caucasian/white (76%)

Visitor Journey: Trip Experience

ACCOMMODATIONS

35% Hotel/Motel/Resort/B&B

27% Condo/Vacation Rental



16% Personal Condo/2nd Home

15% Friends/Family Home

LENGTH OF STAY & NUMBER OF TIMES IN DESTINATION

- Visitors[1] spent **6.5 nights** in the Fort Myers area
- **29%** were **first time** visitors
- **22%** have visited **more than 10 times**

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

VISITOR ACTIVITIES

- Top visitor activities include[1]:

62% Dining

61% Relax & unwind

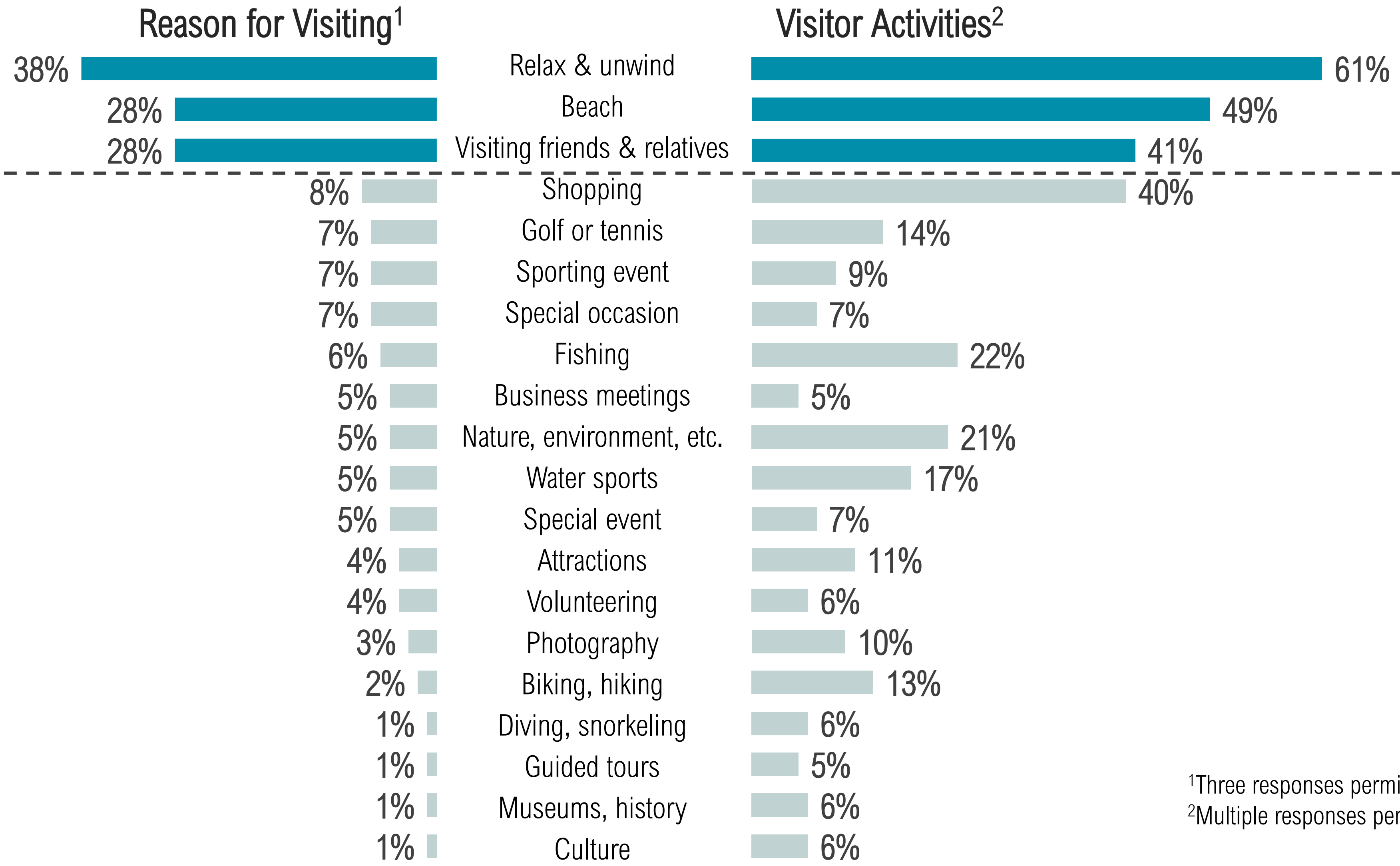
49% Beaches

[1]Multiple responses permitted.

REASON FOR VISITING VS. VISITOR ACTIVITIES

Key Reasons for Visiting

Trip Enhancements



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

TOP COMMUNITIES STAYED

38% Fort Myers

18% Cape Coral

10% Fort Myers Beach

9% Bonita Springs

VISITOR JOURNEY: POST-TRIP EVALUATION

SATISFACTION

- 90% of visitors are likely to recommend the area
  - 47% are very likely to recommend
- 86% of visitors are likely to return
  - 52% are very likely to return
- 75% of visitors are likely to return next year
  - 46% are very likely to return next year

SATISFACTION

- 93% of visitors were satisfied or very satisfied with their overall visit to the Fort Myers area (54% were very satisfied)

- 92% of visitors were satisfied or very satisfied with customer service on their visit (54% were very satisfied)

- 37% of visitors said paid accommodations exceeded their expectations (93% met or exceeded expectations)

TOP ATTRIBUTE RATINGS

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

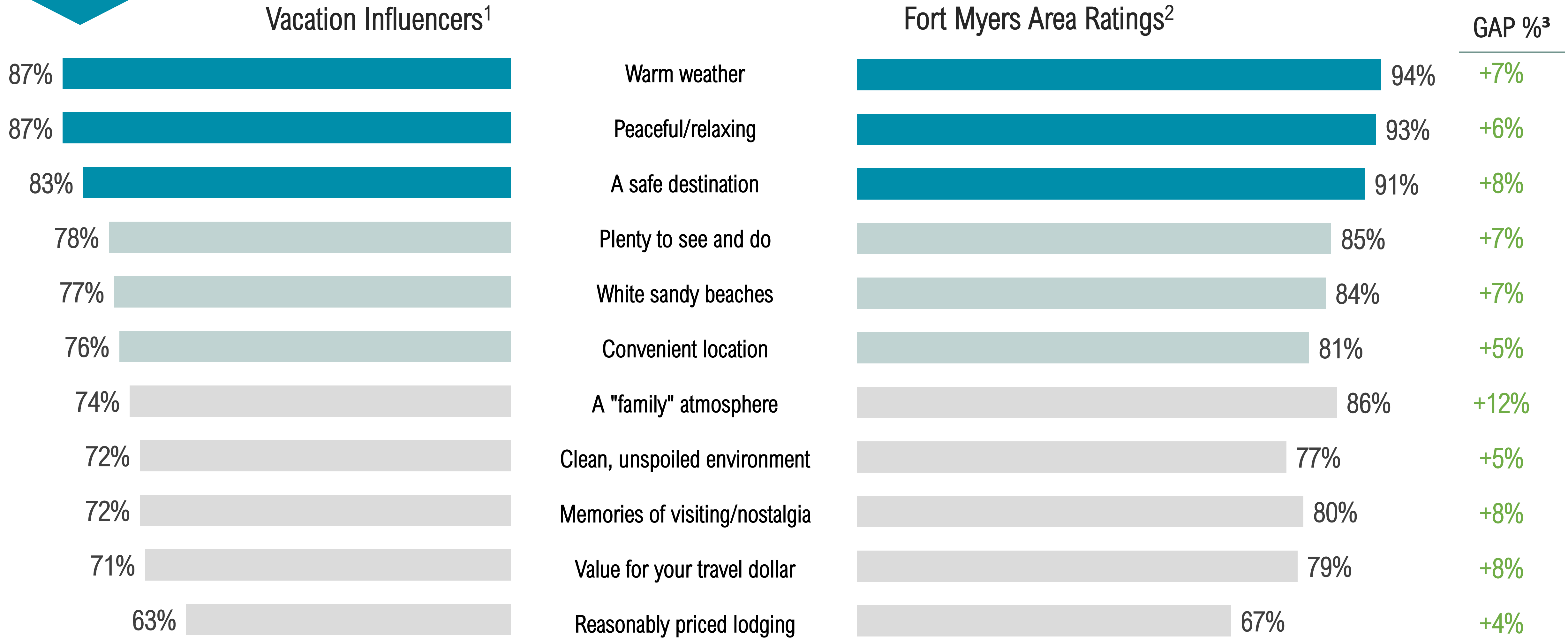
94% Warm weather

93% Peaceful/relaxing

91% A safe destination

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

VACATION ATTRIBUTE INFLUENCE VS. RATINGS



[1]Top 2 box scores. Attributes rated on a scale from 1 to 5 where 1 is Not at All Influential and 5 is Definitely Influential.
[2]Top 2 box scores. Attributes rated on a scale from 1 to 5 where 1 is Poor and 5 is Excellent.
[3]Gap is the difference between Fort Myers Area Ratings and the score for Vacation Influencers. A positive GAP is preferred.

VISITOR CONCERNS

- Nearly 1 in 3 visitors expressed concern about the traffic they experienced in the Fort Myers area during their trip
- Over 1 in 5 were concerned about damaged buildings, while nearly 1 in 5 were concerned about high prices
- 26% of visitors had no concerns about the destination

AREA DESCRIPTIONS

Warm Weather

“It’s a wonderful place to vacation, despite the hurricane damage. Still has great weather and a great atmosphere.”

Peaceful & Relaxing

“Tremendous vacation with near perfect weather, warm days, cool nights, as well as a relaxing and peaceful vibe.”

Safe Destination

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

Detailed Findings

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

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

TOURISM SNAPSHOT: CALENDAR YEAR 2023[1]

Visitor & Lodging Statistics	2022	2023	% Change
Visitors	4,203,900	2,976,200	-29.2%
Visitor Days[2]	26,246,300	19,389,900	-26.1%
Room Nights	5,866,700	4,315,100	-26.4%
Direct Expenditures[3]	$3,951,070,900	$2,894,033,400	-26.8%
Total Economic Impact[4]	$6,294,056,000	$4,633,347,500	-26.4%
TDT Collections	$60,882,800	$37,198,900	-38.9%

[1] Includes: accommodations, restaurants, entertainment, shopping, transportation, groceries, and "other" expenses.

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

[3] Economic impact includes indirect and induced effects of visitor spending. Indirect effects are increased business spending resulting from tourism dollars. Induced effects are increased household spending resulting from tourism dollars.

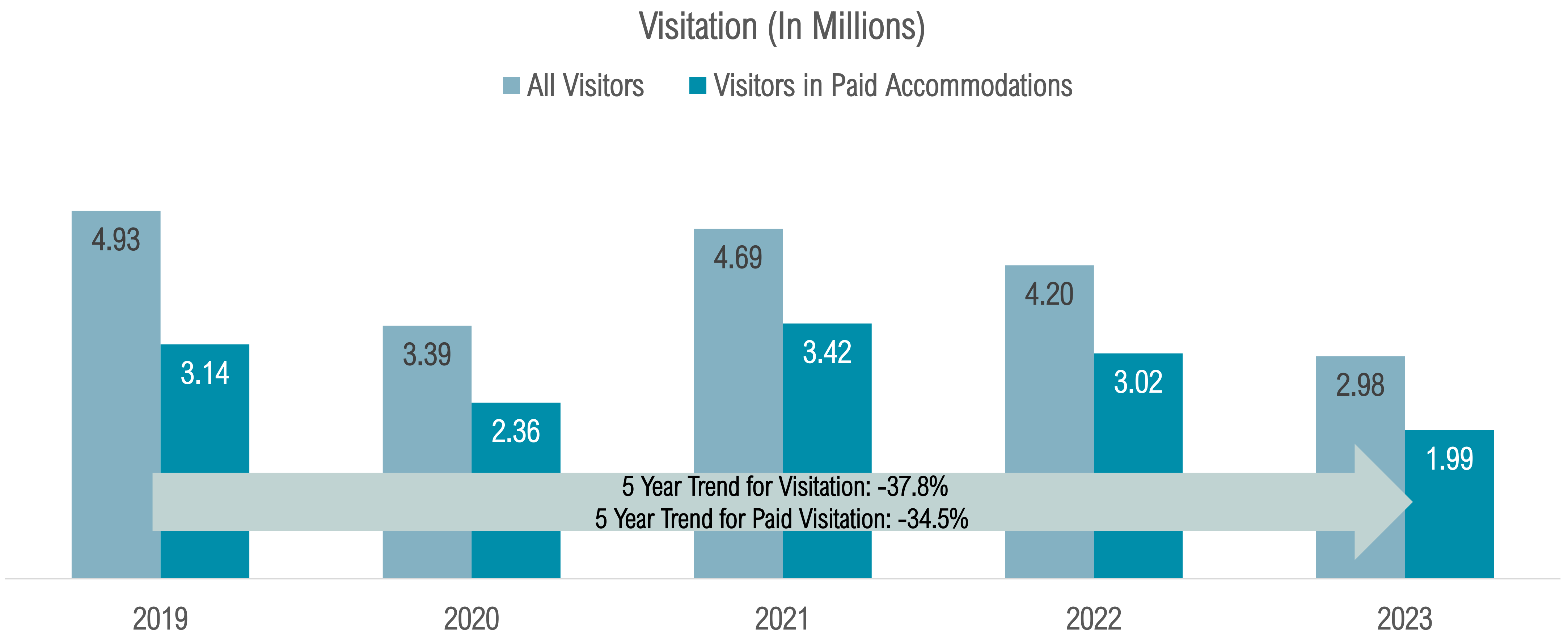
[4] The IMPLAN multiplier used to estimate economic impact is 1.601.

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM

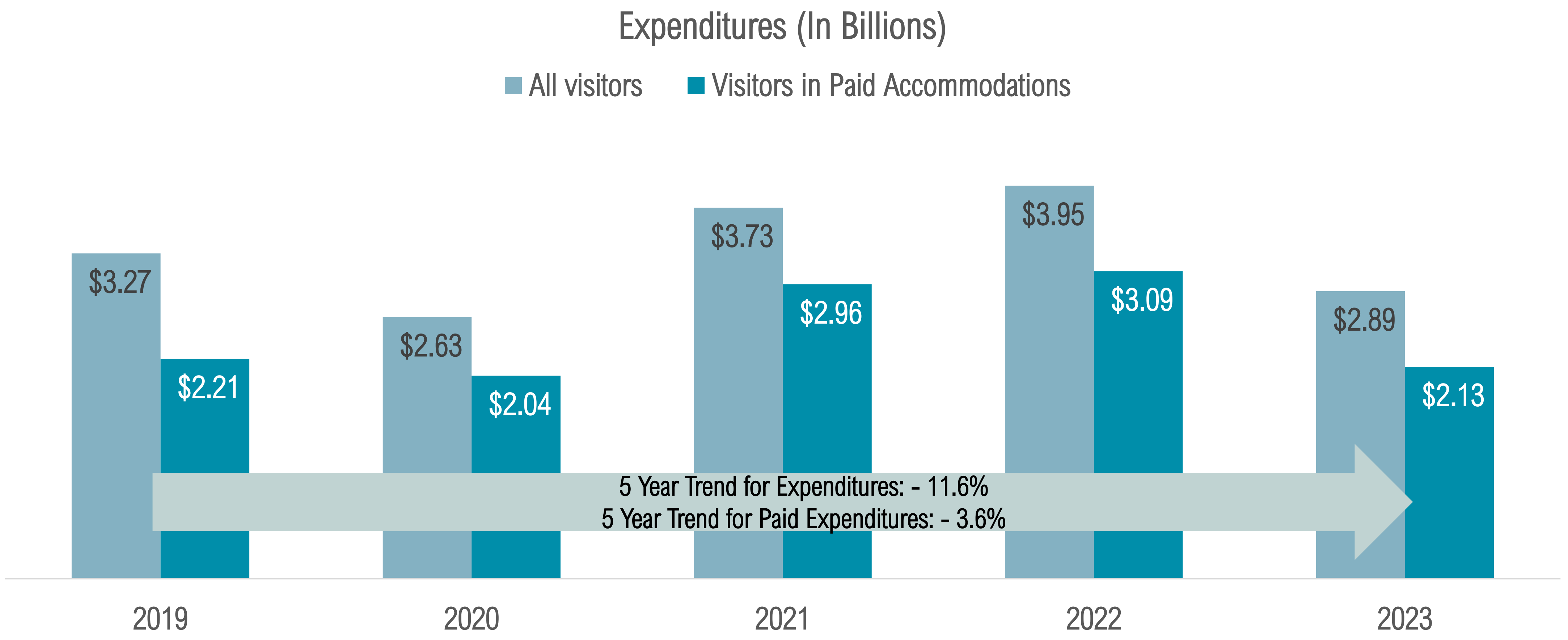
	2022	2023	% Change
Direct Jobs	50,500	35,900	-28.9%
Total Jobs[1]	69,400	48,200	-30.5%
Direct Wages	$1,219,340,100	$956,829,700	-21.5%
Total Wages[1]	$1,978,615,400	$1,493,744,900	-24.5%
Visitors per Job Supported	61	62	
Household Savings on Taxes	$1,862	$1,004	

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

5 YEAR TREND: VISITATION



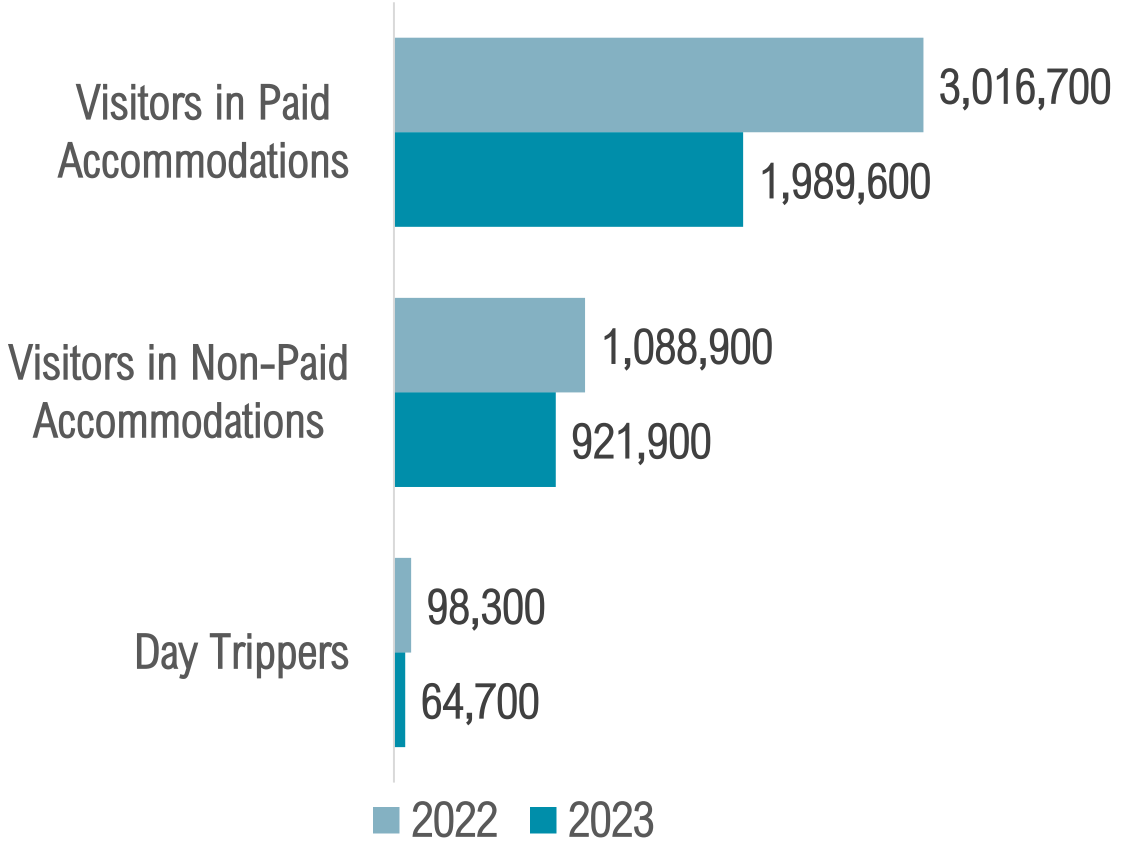
5 YEAR TREND: VISITOR SPENDING[1]



[1] Note: Cumulative inflation during the same five-year period was about 22%, most of which occurred during the 24-month period between April 2021 and April 2023.

NUMBER OF VISITORS

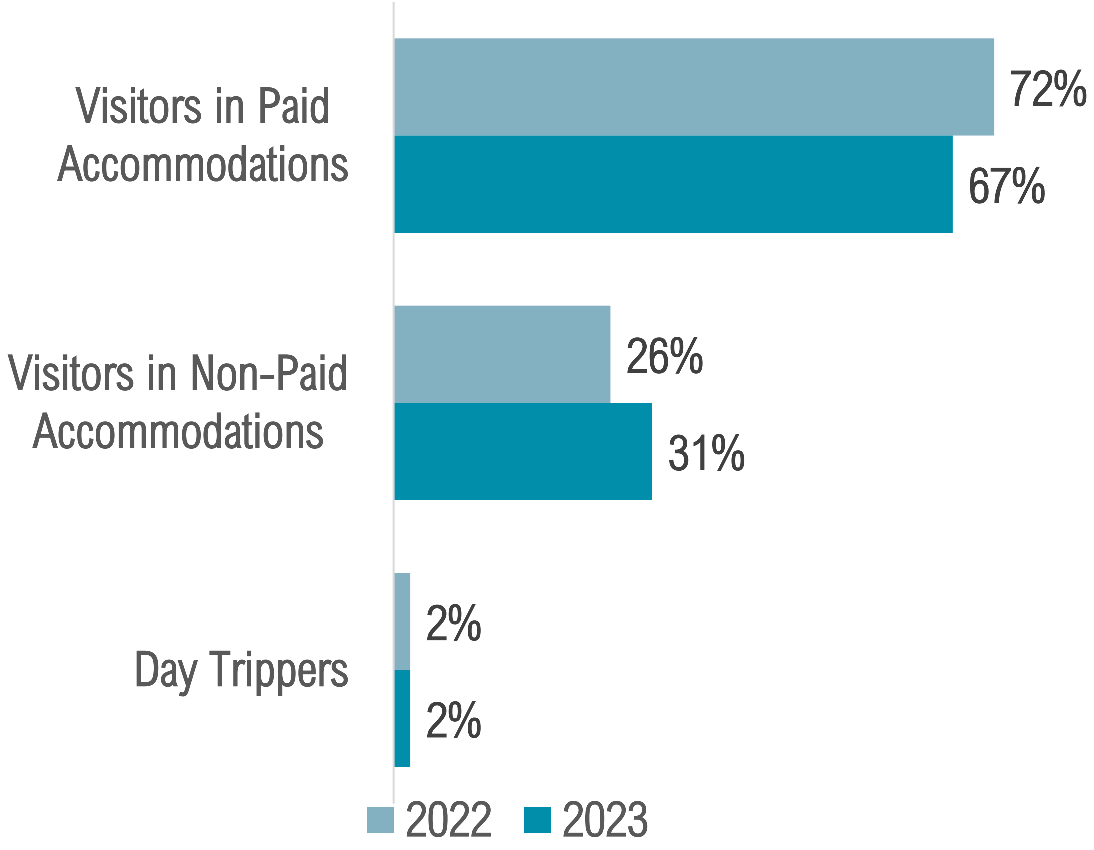
There were **2,976,200[1] visitors** to the Fort Myers area in 2023 (-29.2% from 2022).



[1]Sources: Visitor Tracking Study & Occupancy Survey

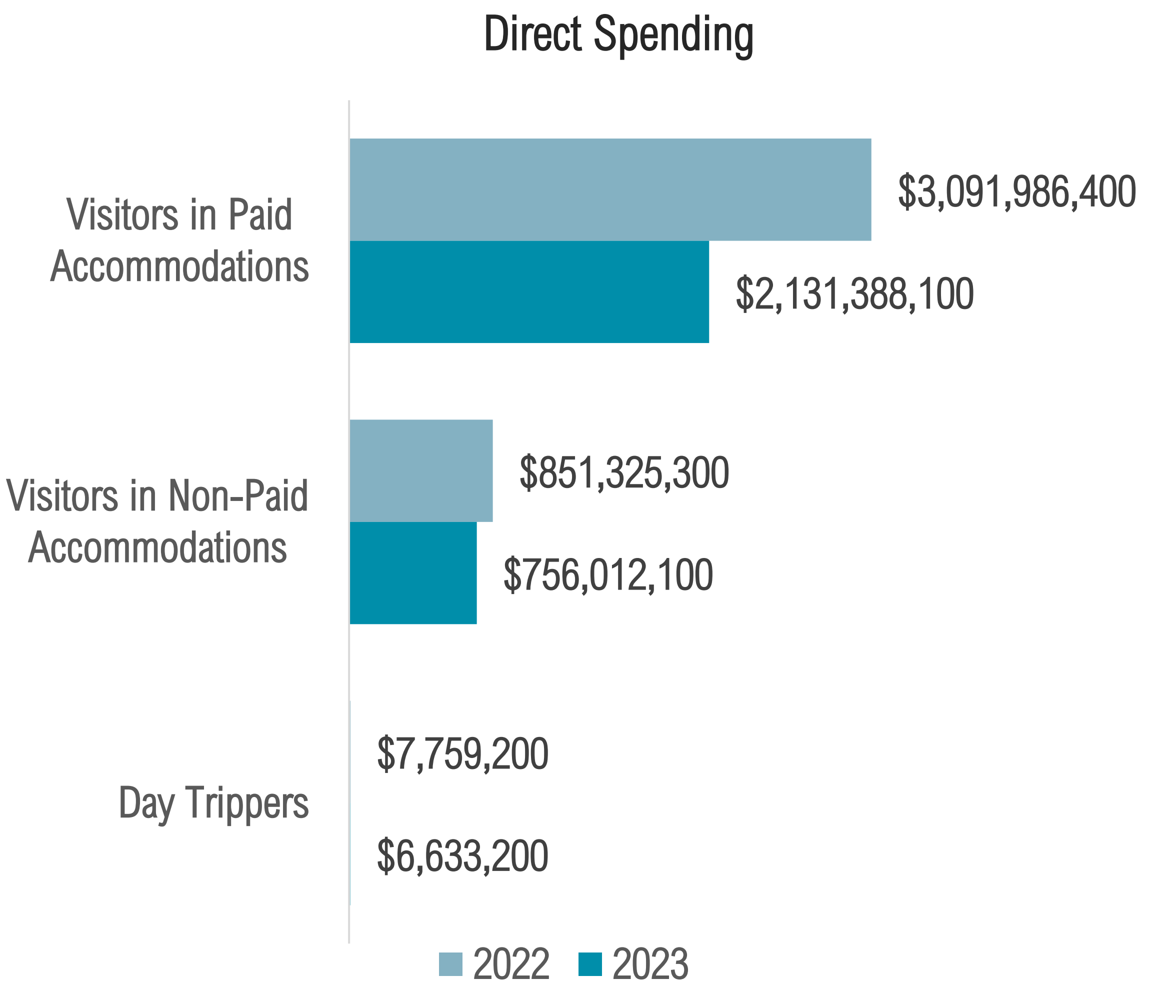
VISITOR TYPE

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



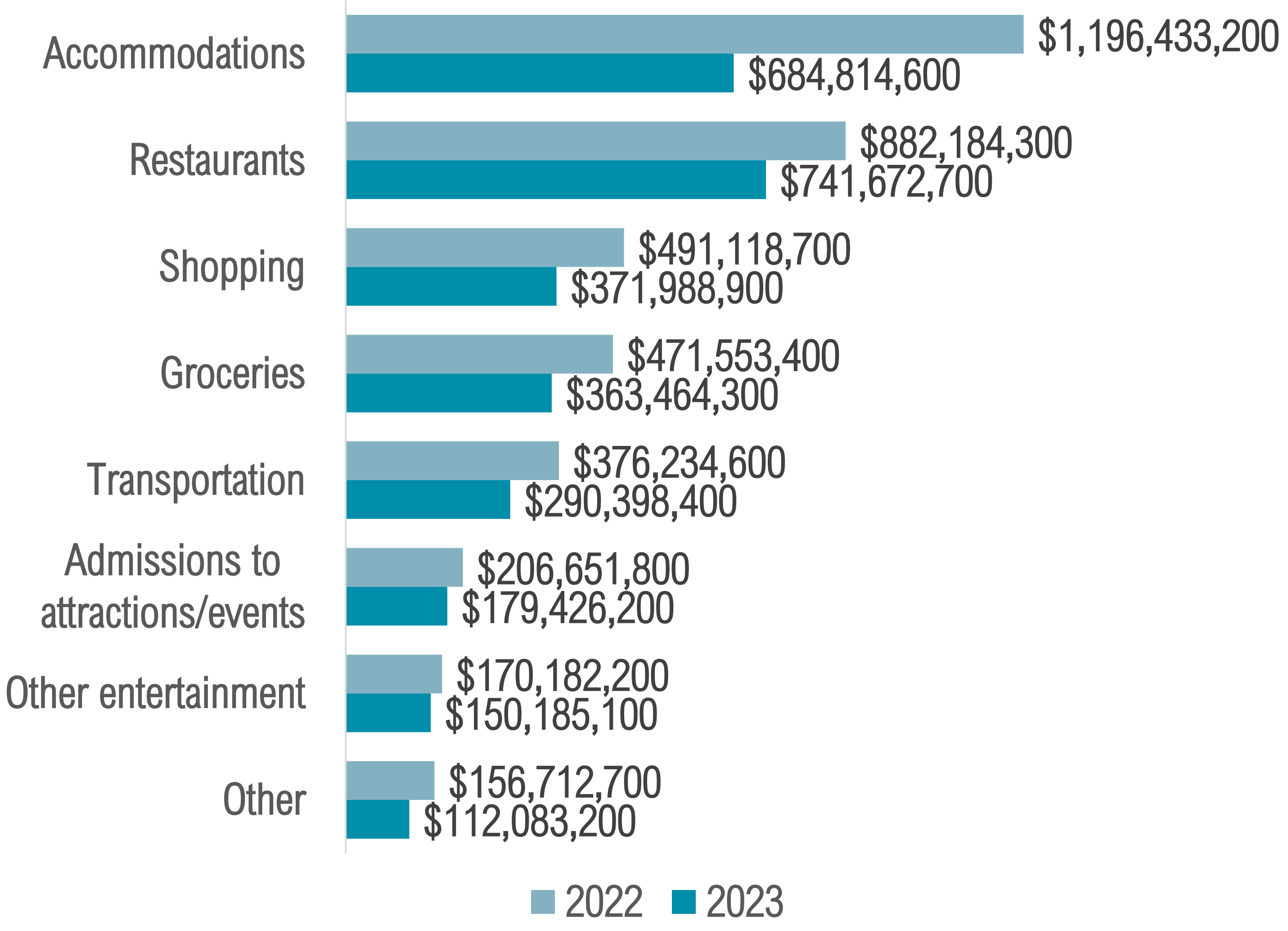
VISITOR EXPENDITURES BY VISITOR TYPE

2023 visitors spent $2,894,033,400 in the Fort Myers area, resulting in a total economic impact of $4,633,347,500, down 26.4% from 2022.



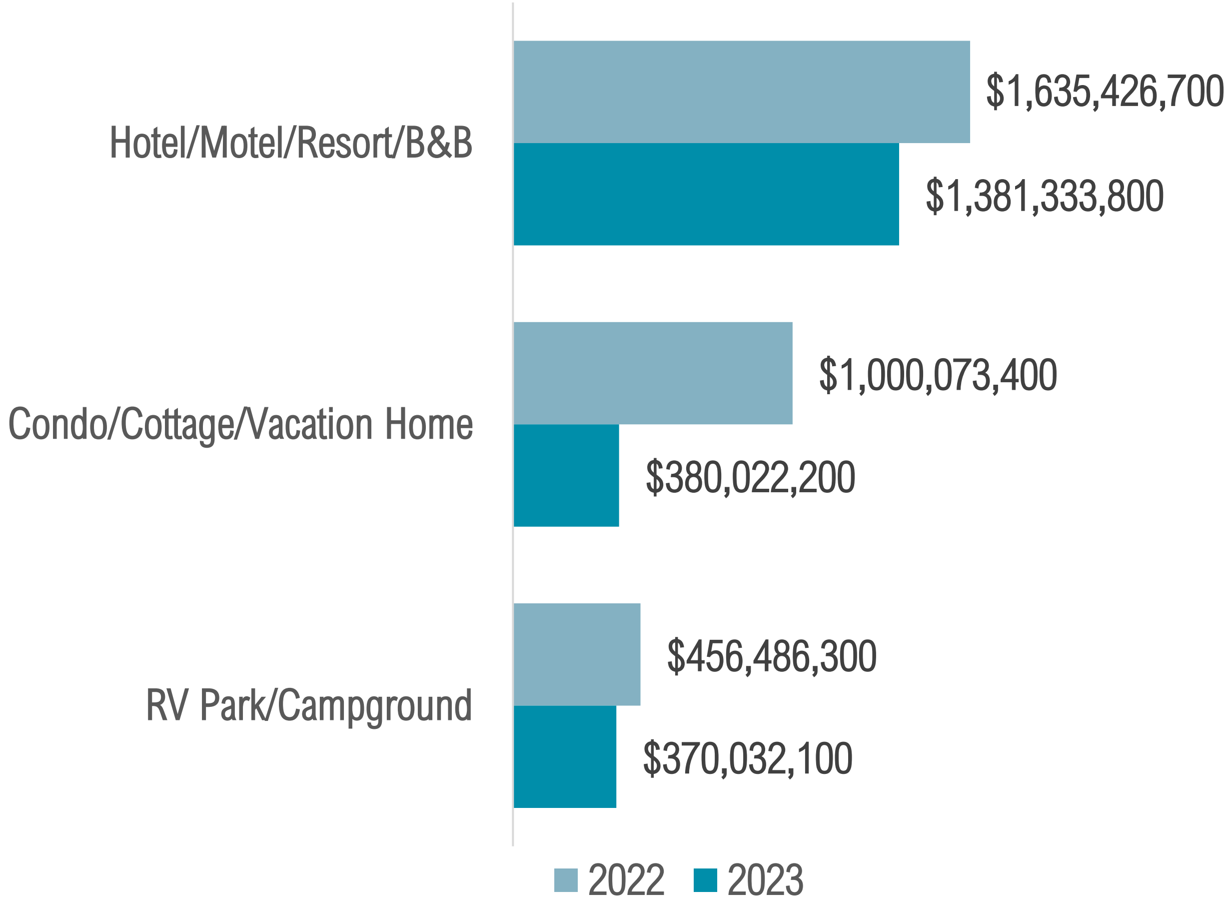
VISITOR EXPENDITURES BY SPENDING CATEGORY

Visitor spending on **accommodations** accounted for **24%** of total visitor spending in 2023.



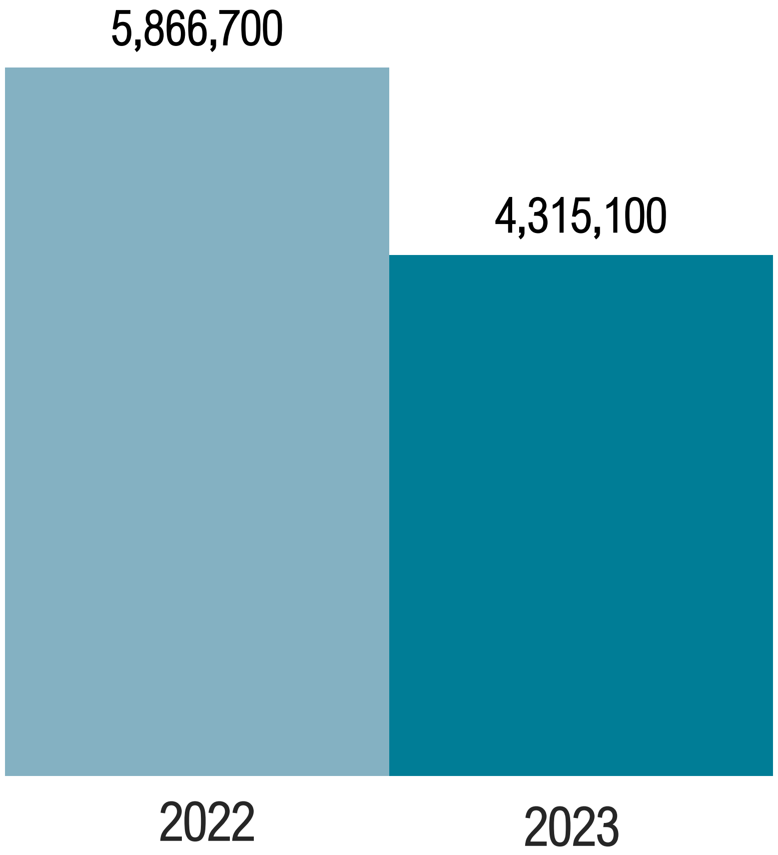
VISITOR EXPENDITURES BY LODGING TYPE

2023 visitors staying in **paid accommodations** spent **$2,131,388,100** in the Fort Myers area.



ROOM NIGHTS GENERATED

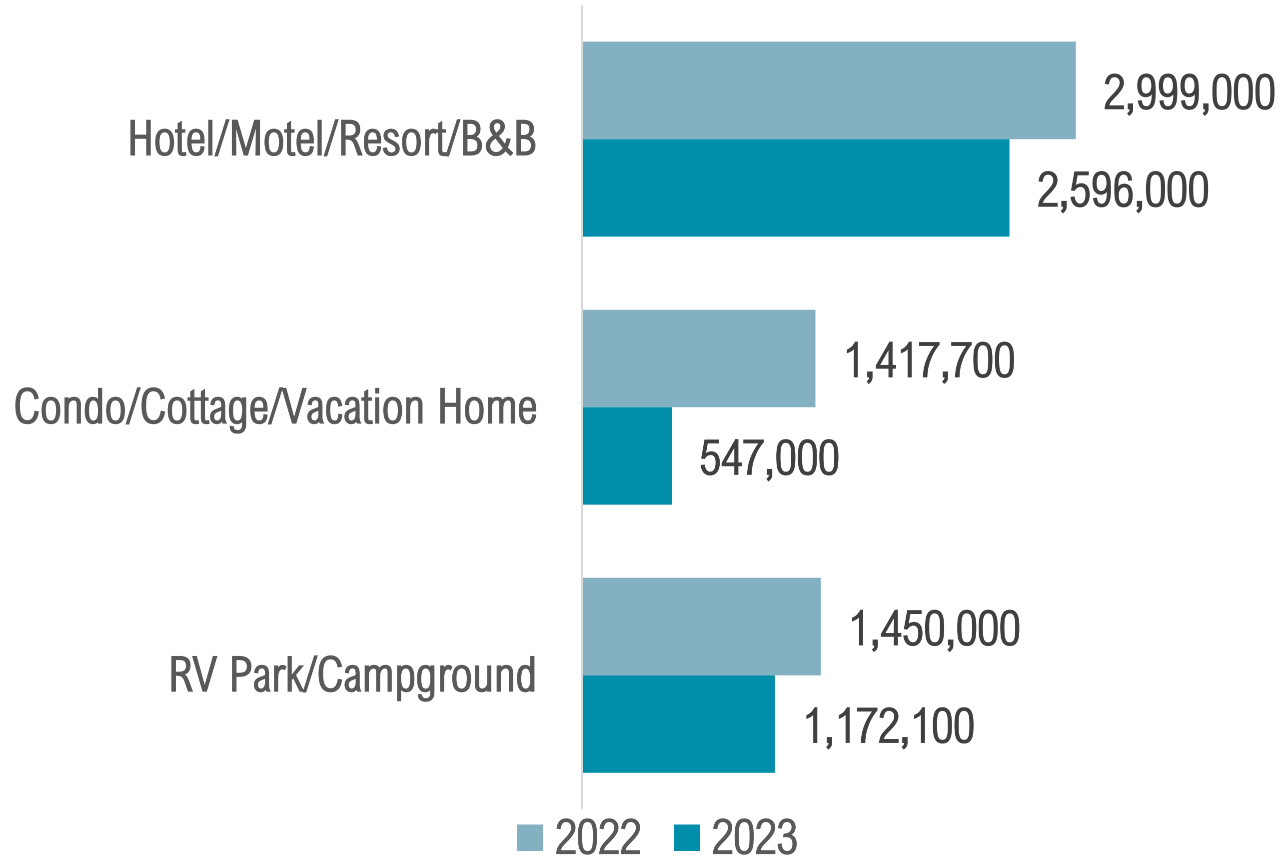
2023 visitors spent **4,315,100[1] nights** in the Fort Myers area. (-26.4% from 2022).



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

ROOM NIGHTS GENERATED

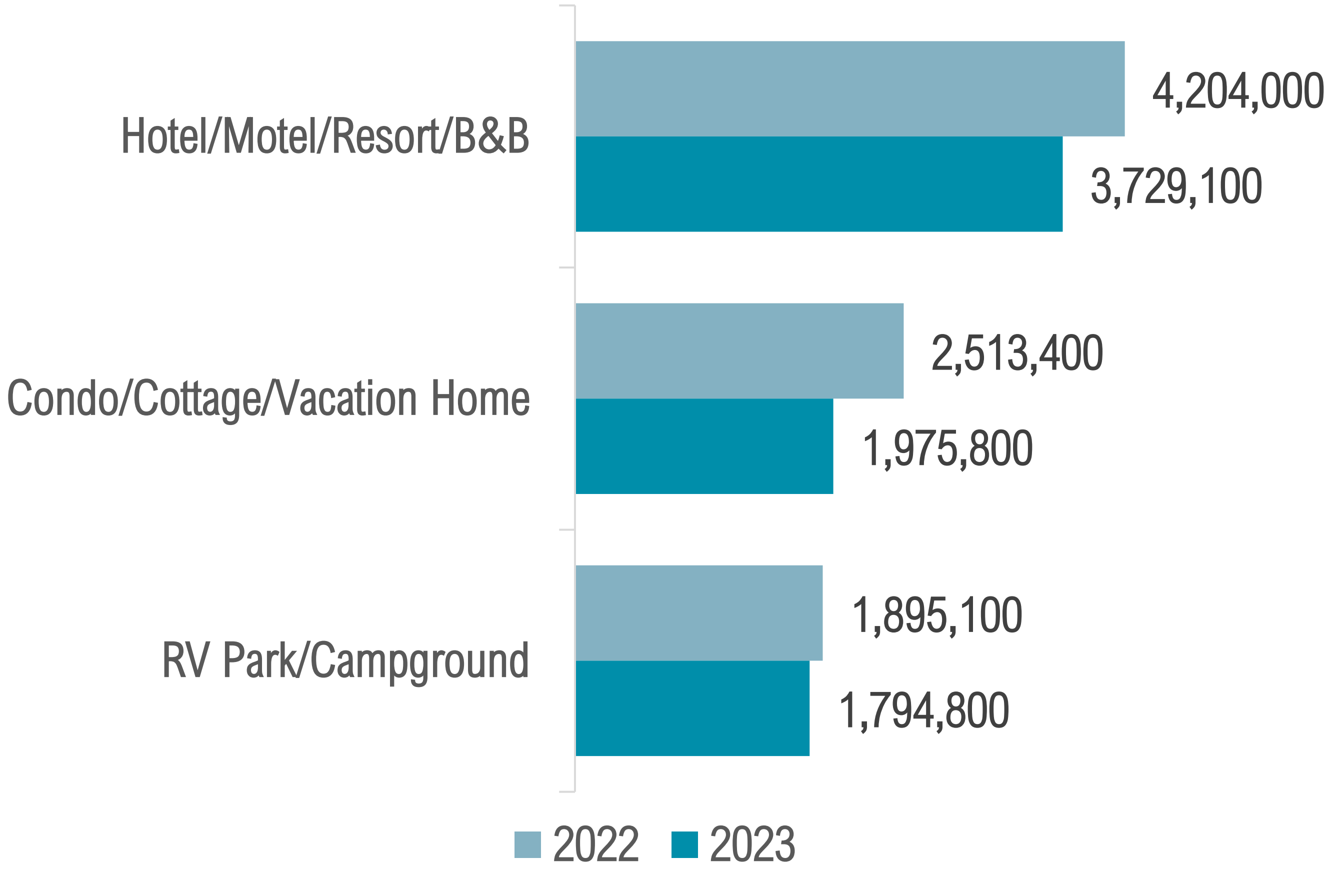
Hotels, motels, etc. accounted for **3 in 5** room nights generated in the Fort Myers area, while **RV Parks/Campgrounds** accounted for over **1 in 4** room nights generated in the area.



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

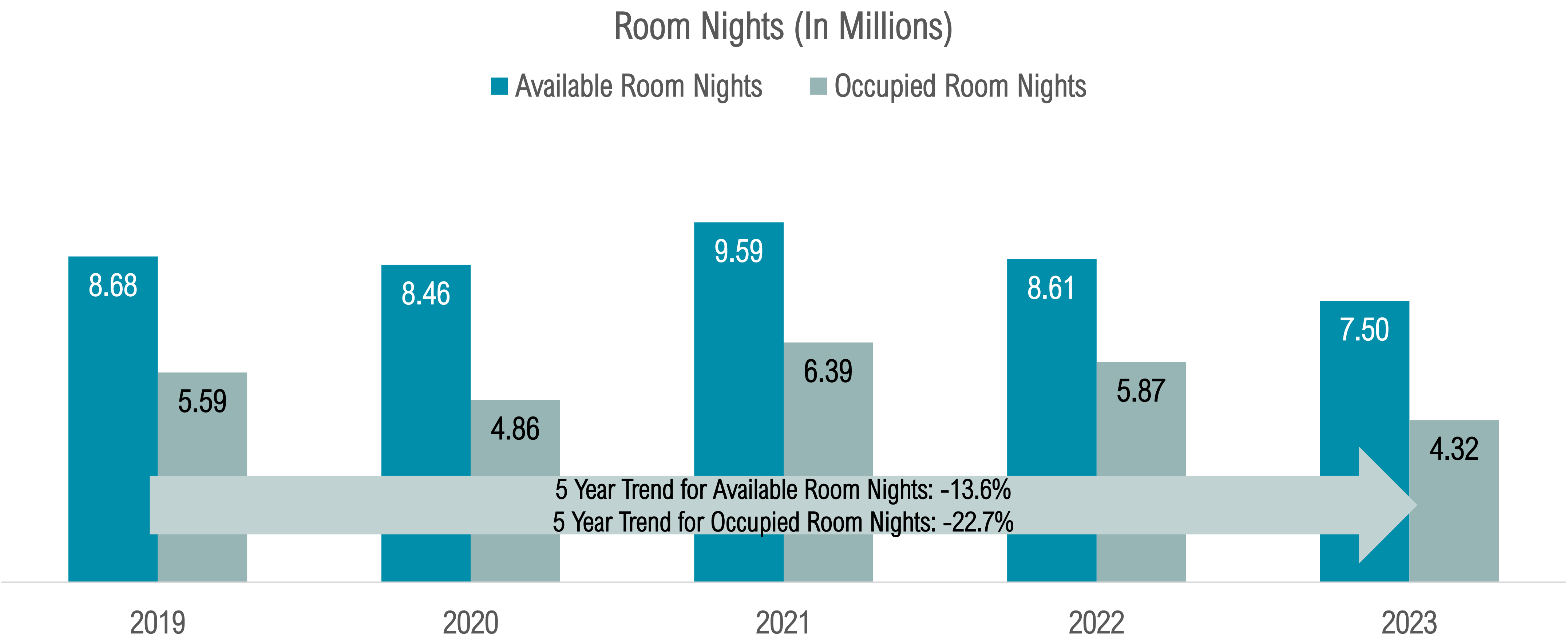
AVAILABLE ROOM NIGHTS

There were **7,499,700[1] available room nights** in 2023 vs. 8,612,500 in 2022 (-12.9%).

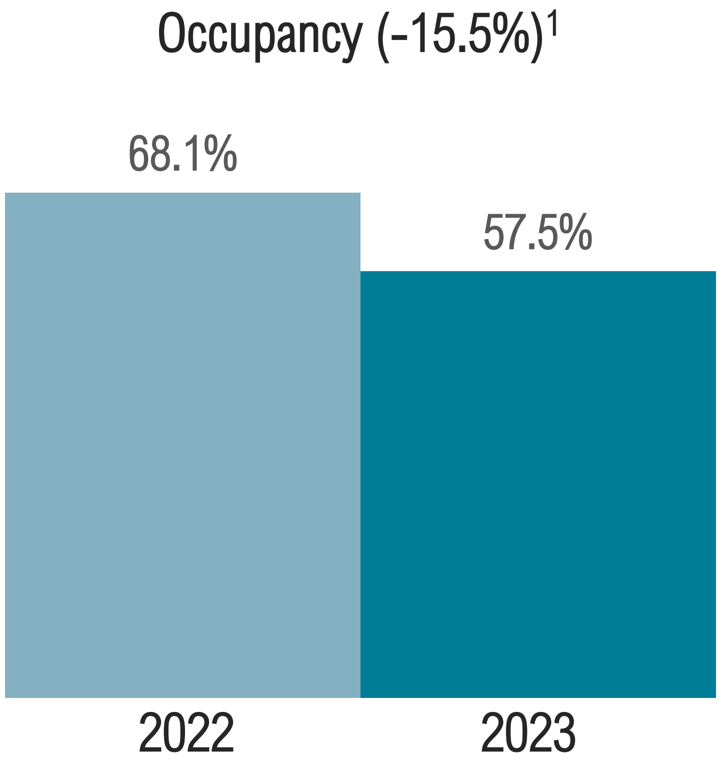


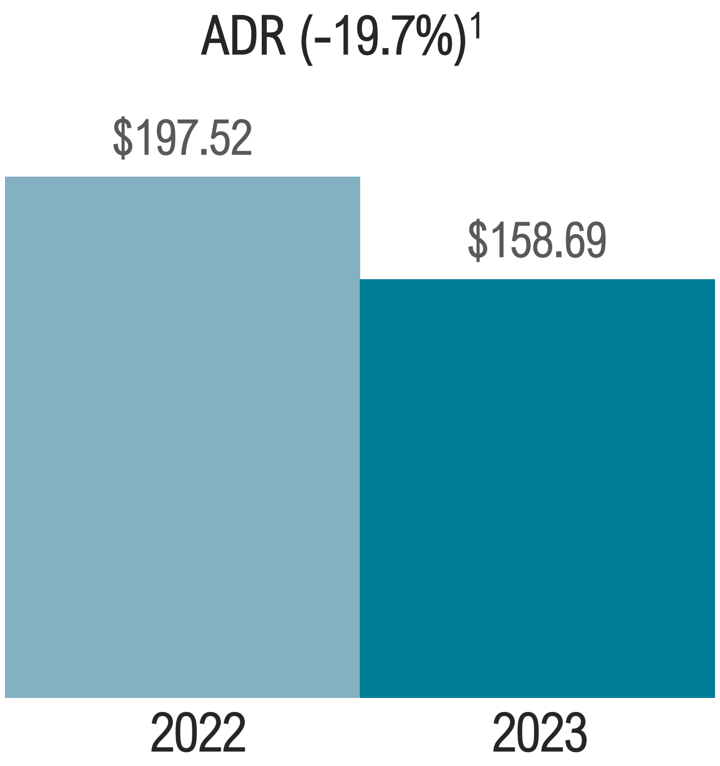
[1]Source: Occupancy Survey, STR, and KeyData

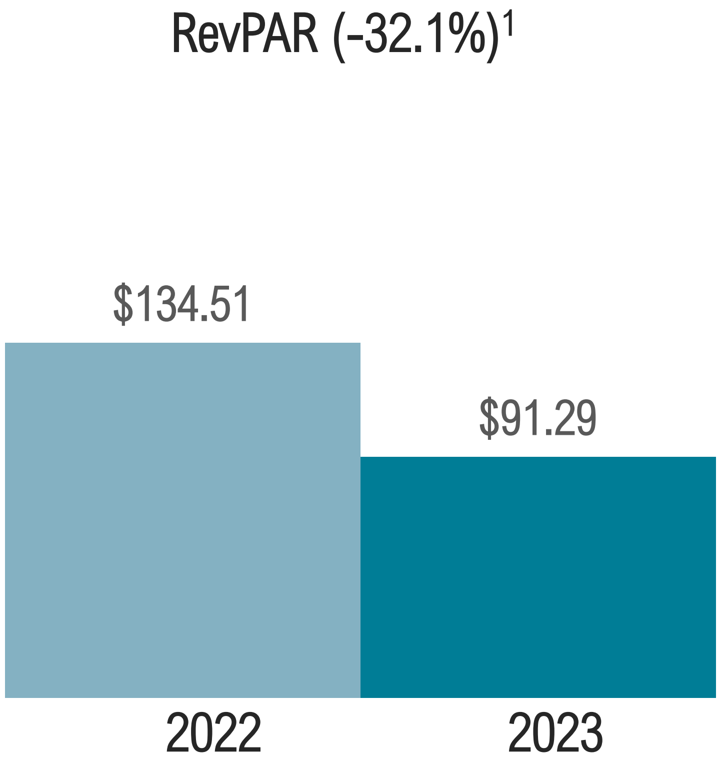
5 YEAR TREND: AVAILABLE & OCCUPIED ROOM NIGHTS



OCCUPANCY, ADR AND REVPAR



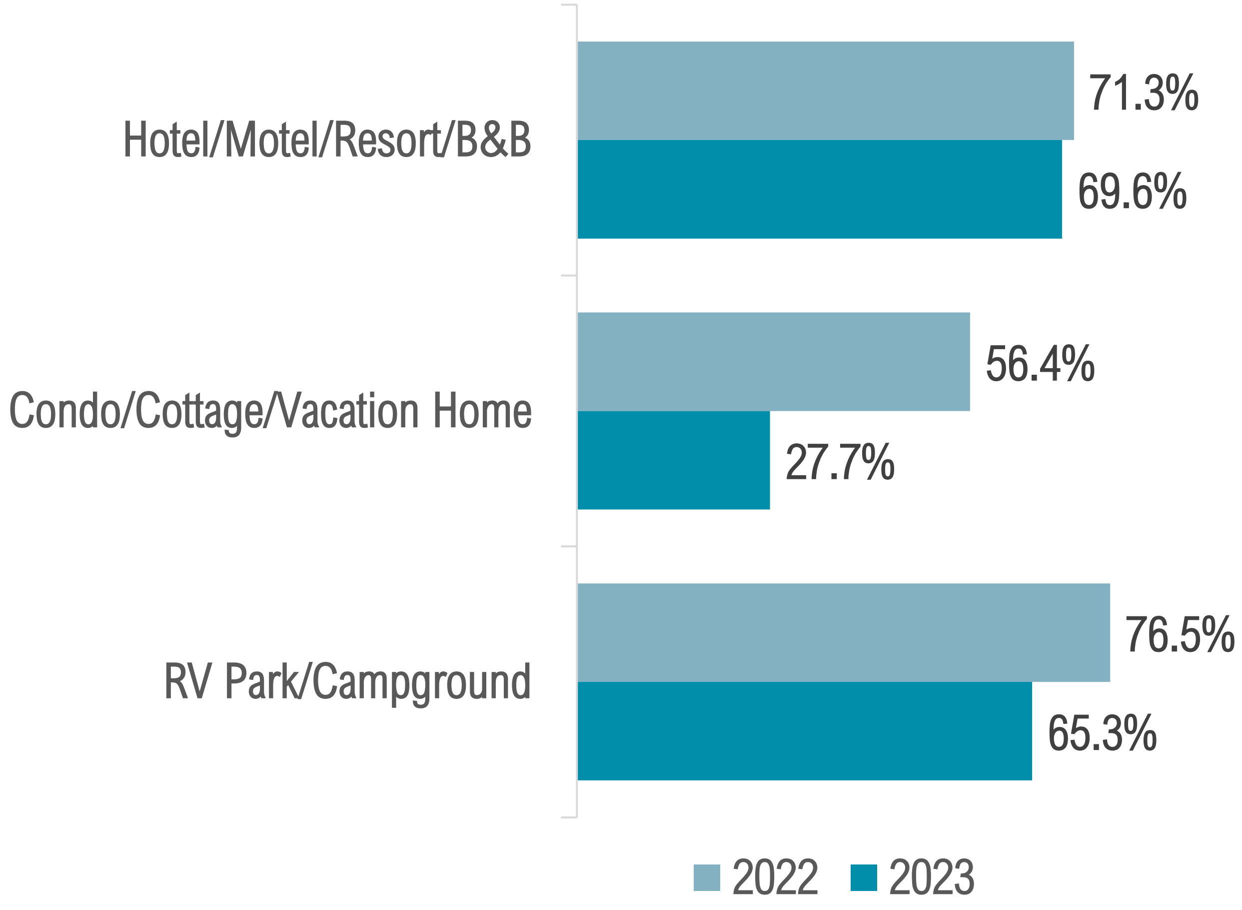




[1]Source: Occupancy Survey, STR, & KeyData

OCCUPANCY

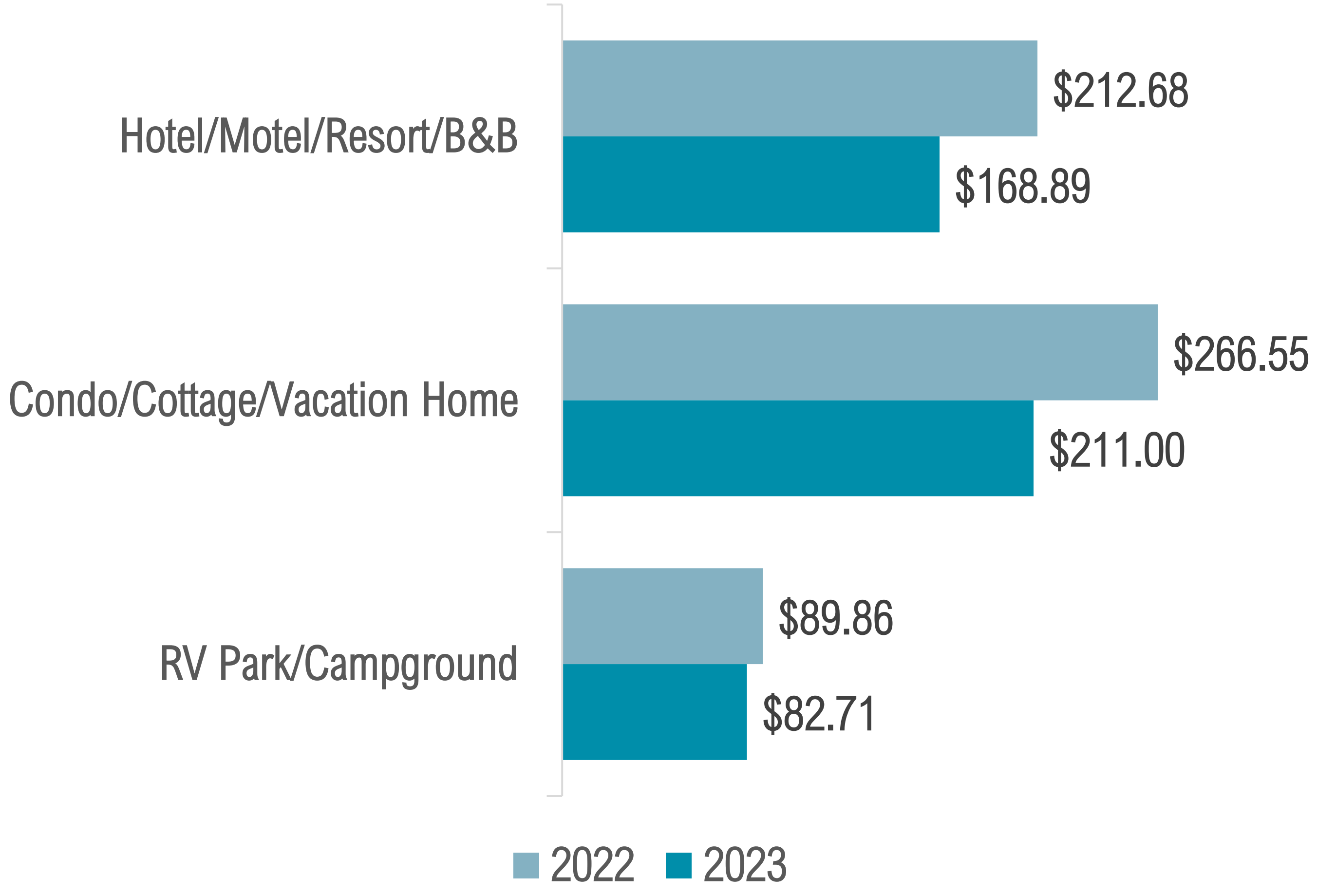
Average **occupancy** in 2023 was **57.5%**[1] (68.1% in 2022).



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

ADR

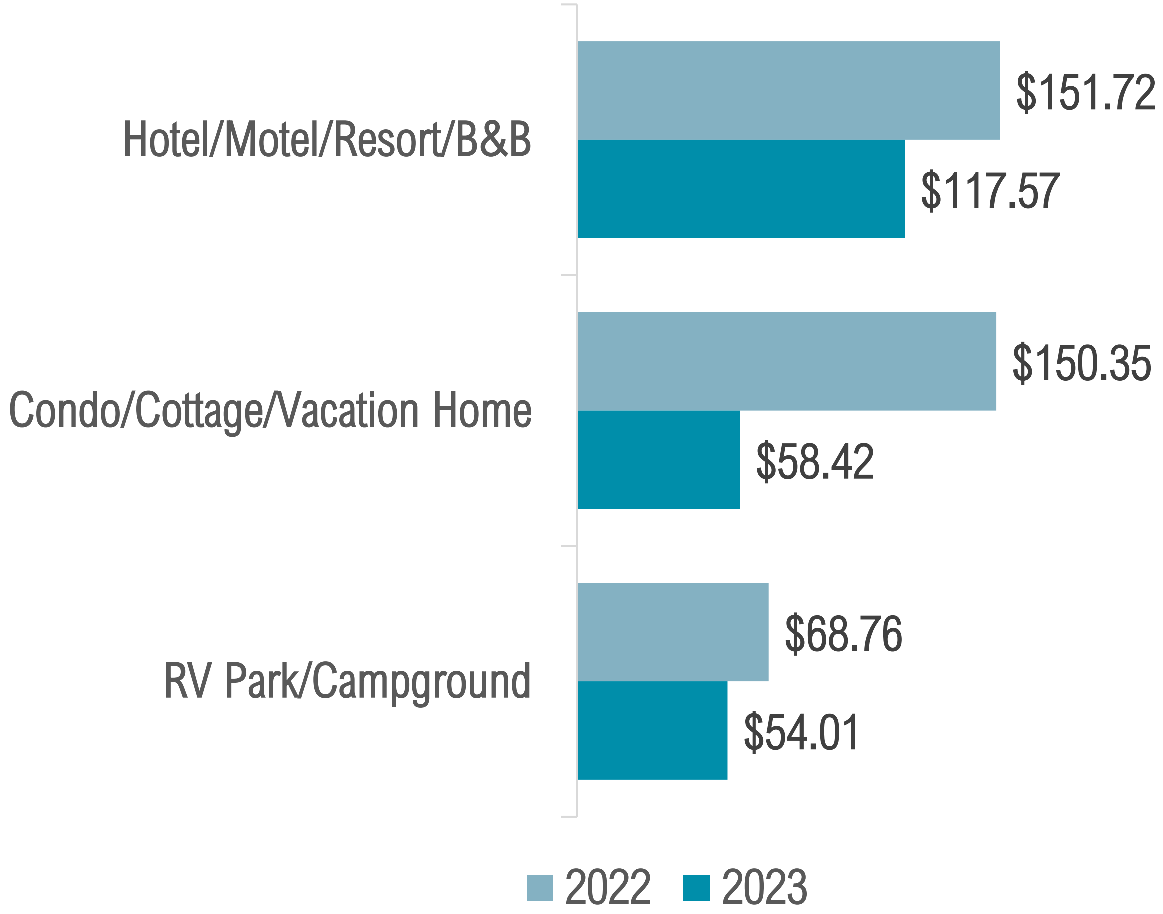
ADR in 2023 was **$158.69**[1] ($197.52 in 2022).



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

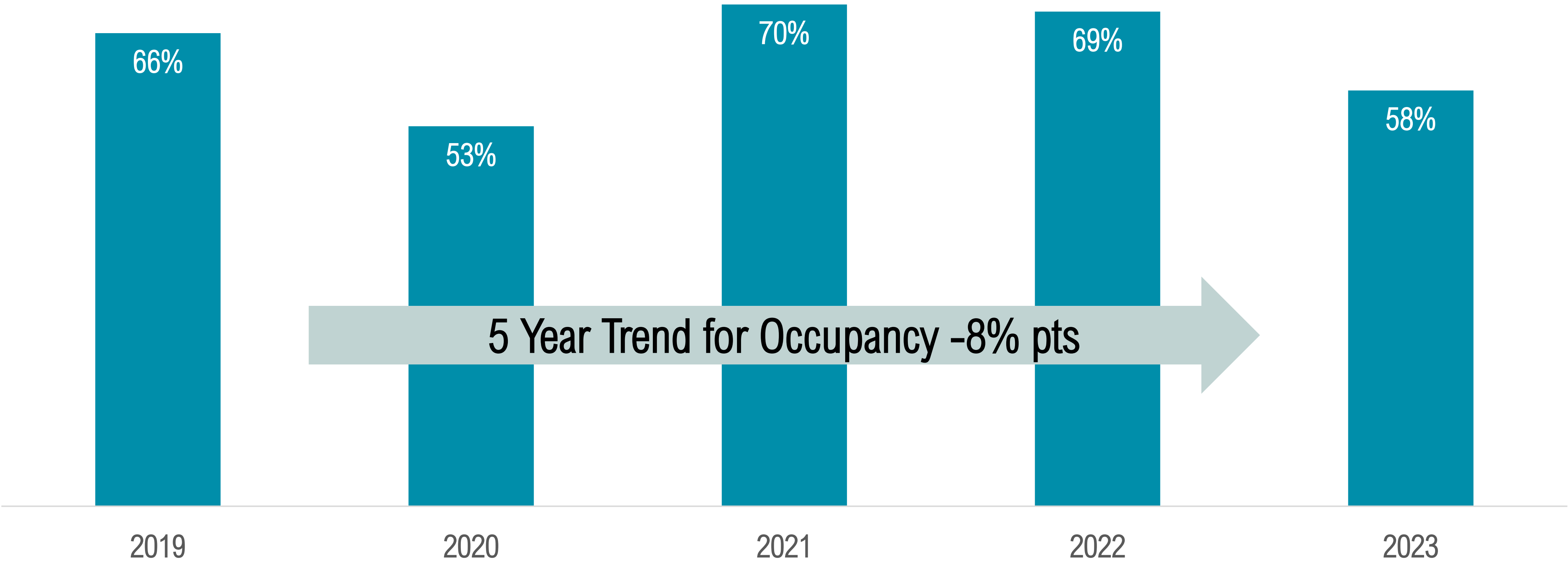
REVPAR

Average **RevPAR** in 2023 was **$91.29**[1] ($134.51 in 2022).



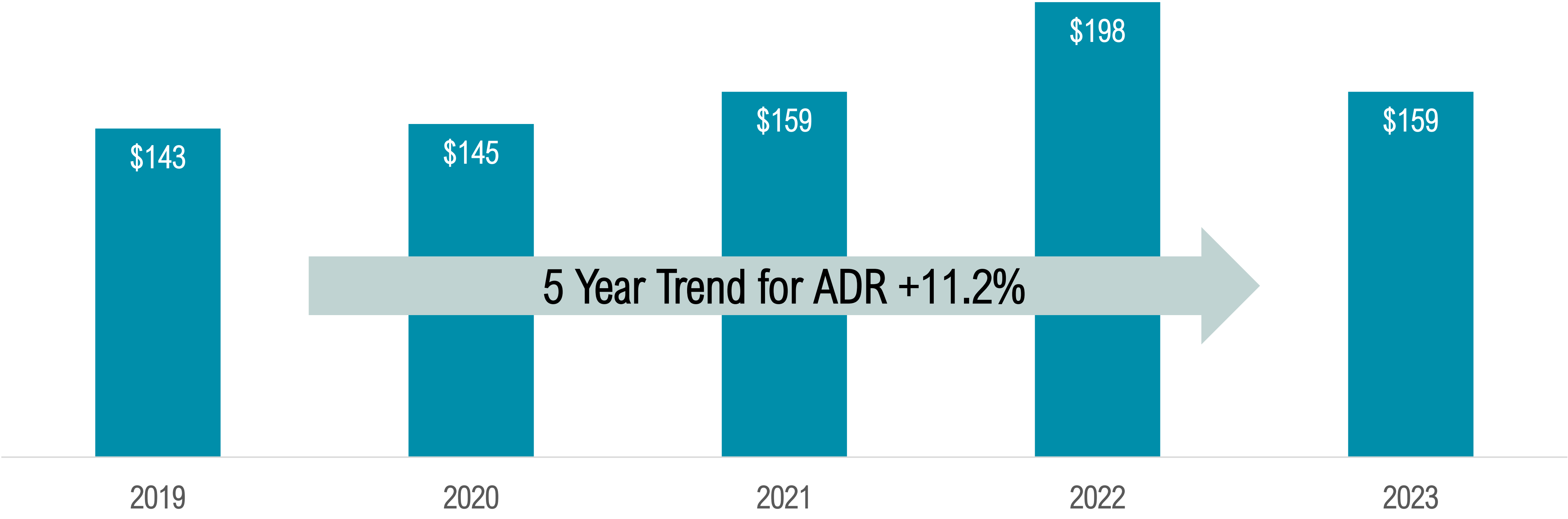
[1]Source: Occupancy Survey, STR, and KeyData

5 YEAR TREND: OCCUPANCY



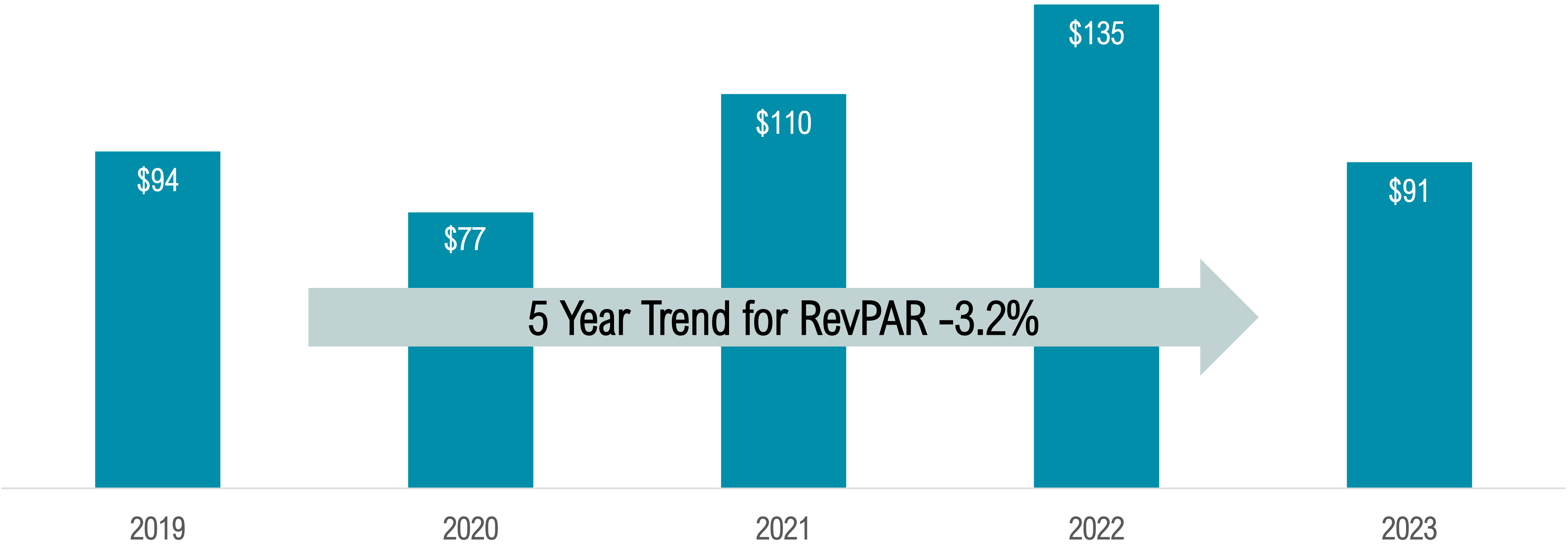
[1]Source: Occupancy Survey, STR, and KeyData

5 YEAR TREND: ADR[1]



[1] Note: Cumulative inflation during the same five-year period was about 22%, most of which occurred during the 24-month period between April 2021 and April 2023.

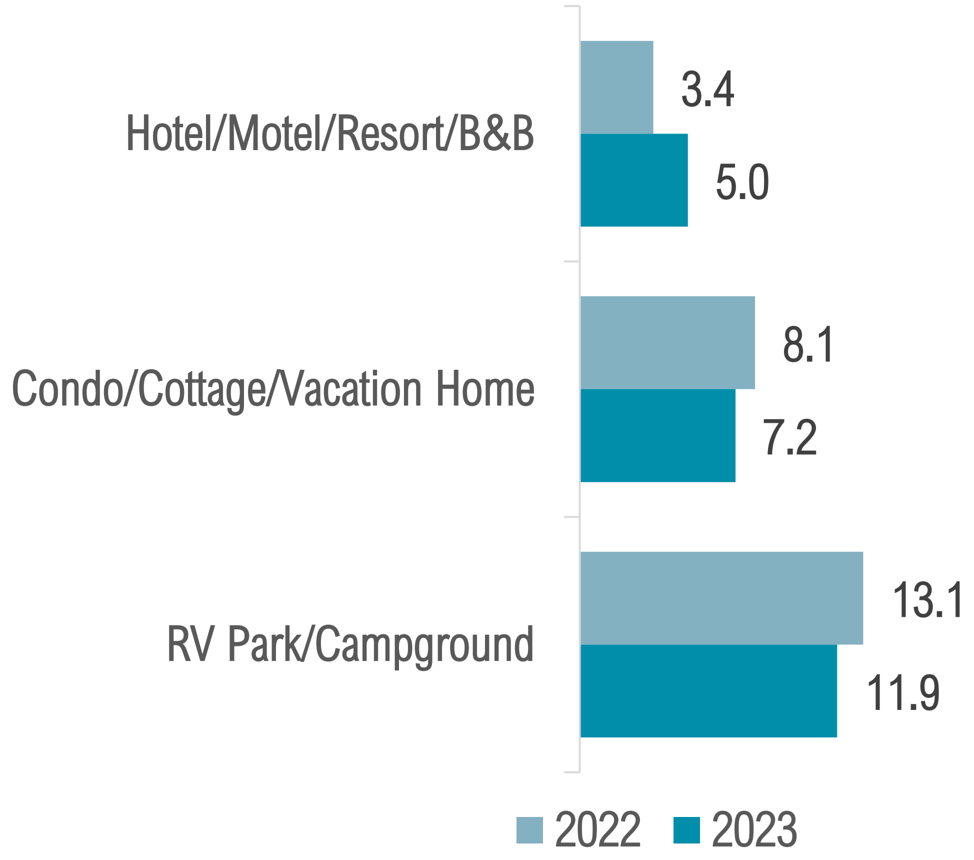
5 YEAR TREND: REVPAR[1]



[1] Note: Cumulative inflation during the same five-year period was about 22%, most of which occurred during the 24-month period between April 2021 and April 2023.

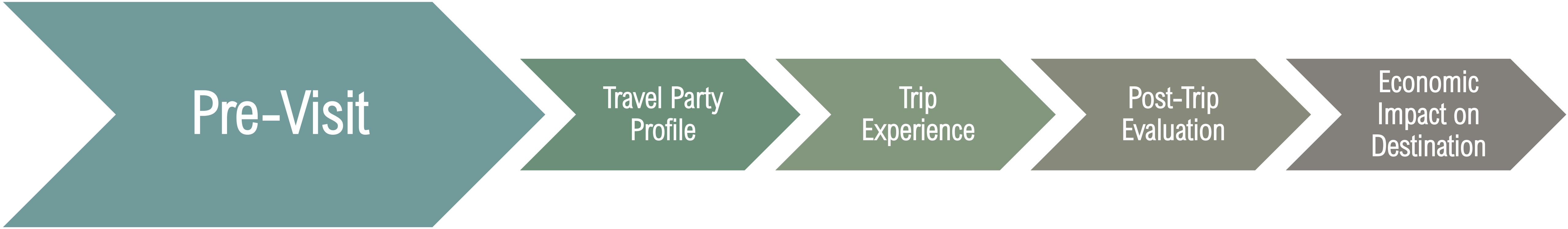
LENGTH OF STAY

For visitors in **paid accommodations**, average length of stay in 2023 was 6.2 nights[1] (5.4 nights in 2022).



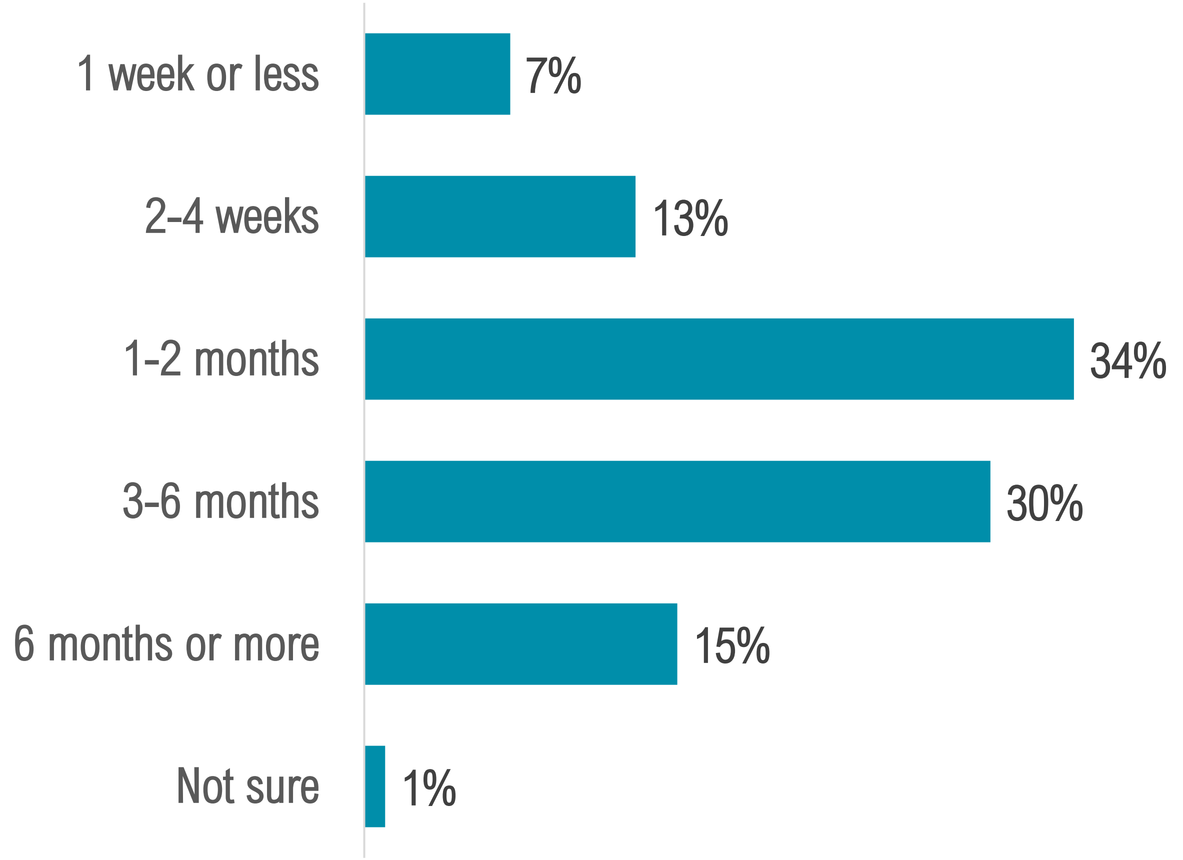
[1]Source: Occupancy Survey, STR, and KeyData

VISITOR JOURNEY: PRE-VISIT



TRIP PLANNING CYCLE

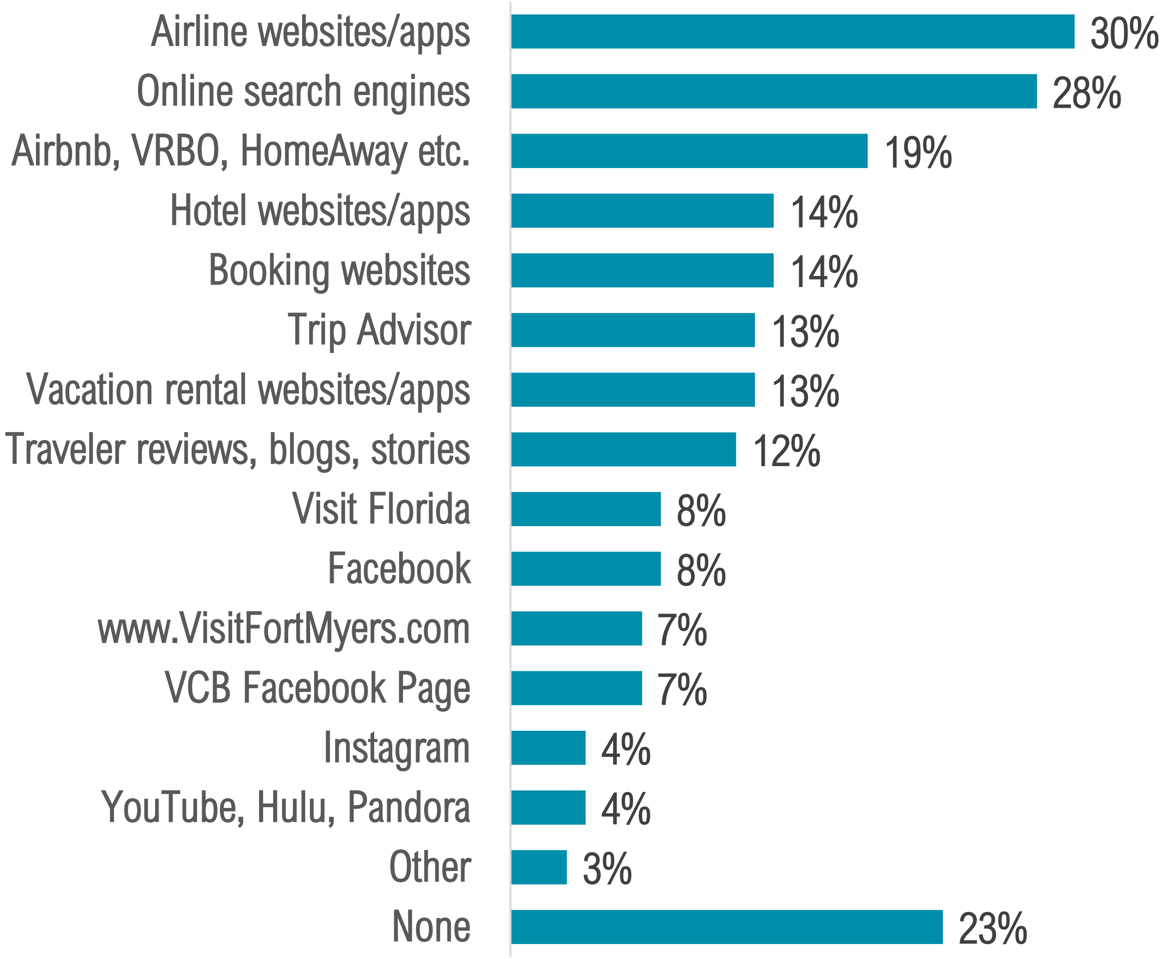
Nearly half of visitors planned their trip **3 months or more in advance**, while **34%** planned their trip **1-2 months in advance**.



TRIP PLANNING: WEBSITES USED[1]

77% of visitors used **websites** to plan their trips to the Fort Myers area.

About **3 in 10** visitors used **airline websites/apps** and **online search engines** to plan their trips in 2023.



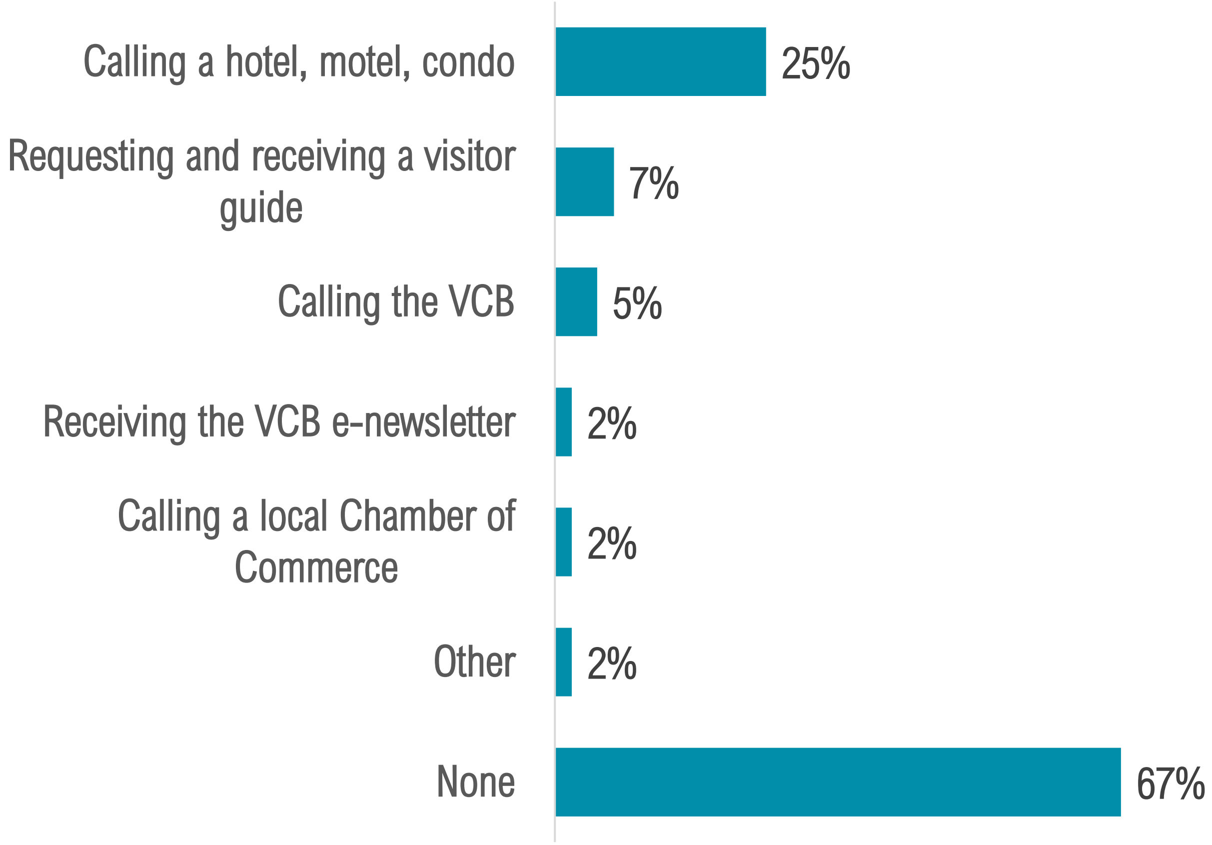
[1]Multiple responses permitted.

TRIP PLANNING: INFORMATION REQUESTS[1]

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

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

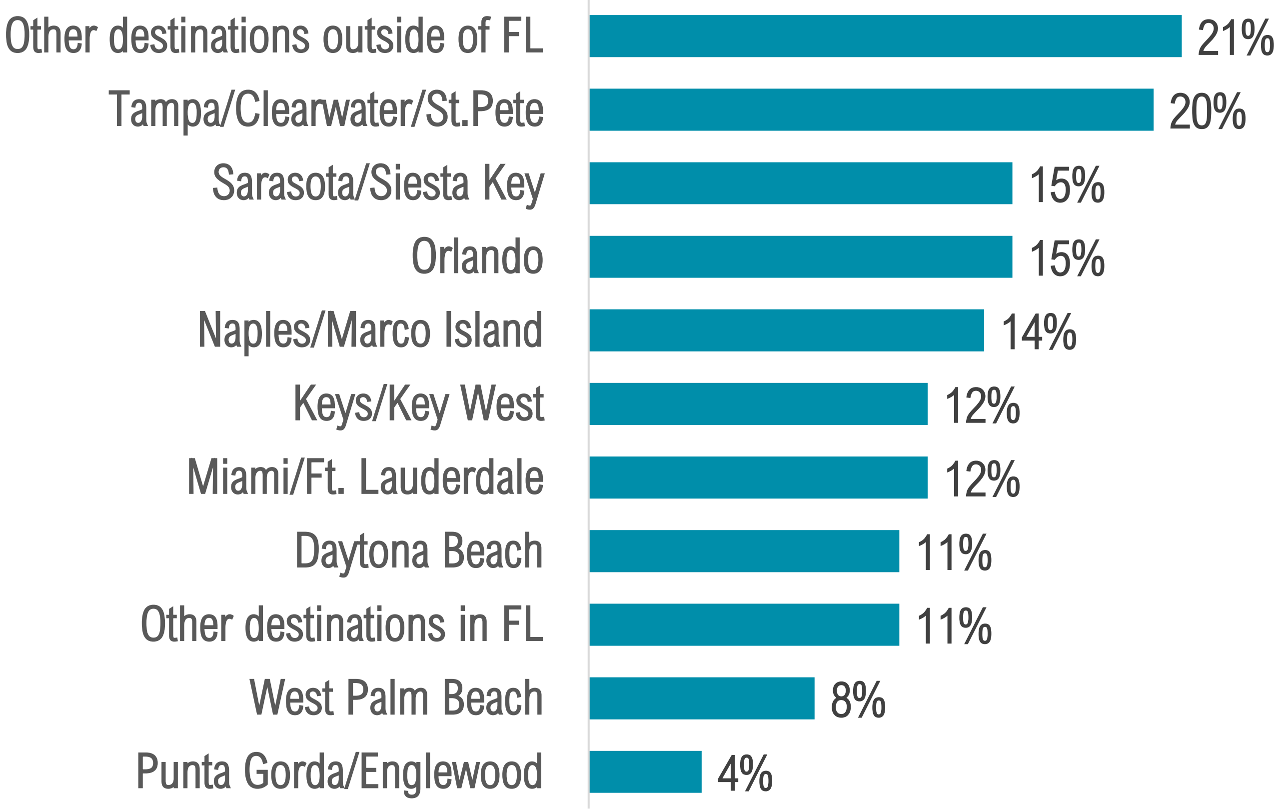
Visitors were less likely to make information requests in 2023 (-9% points).



[1]Multiple responses permitted.

TRIP PLANNING: OTHER DESTINATIONS CONSIDERED[1]

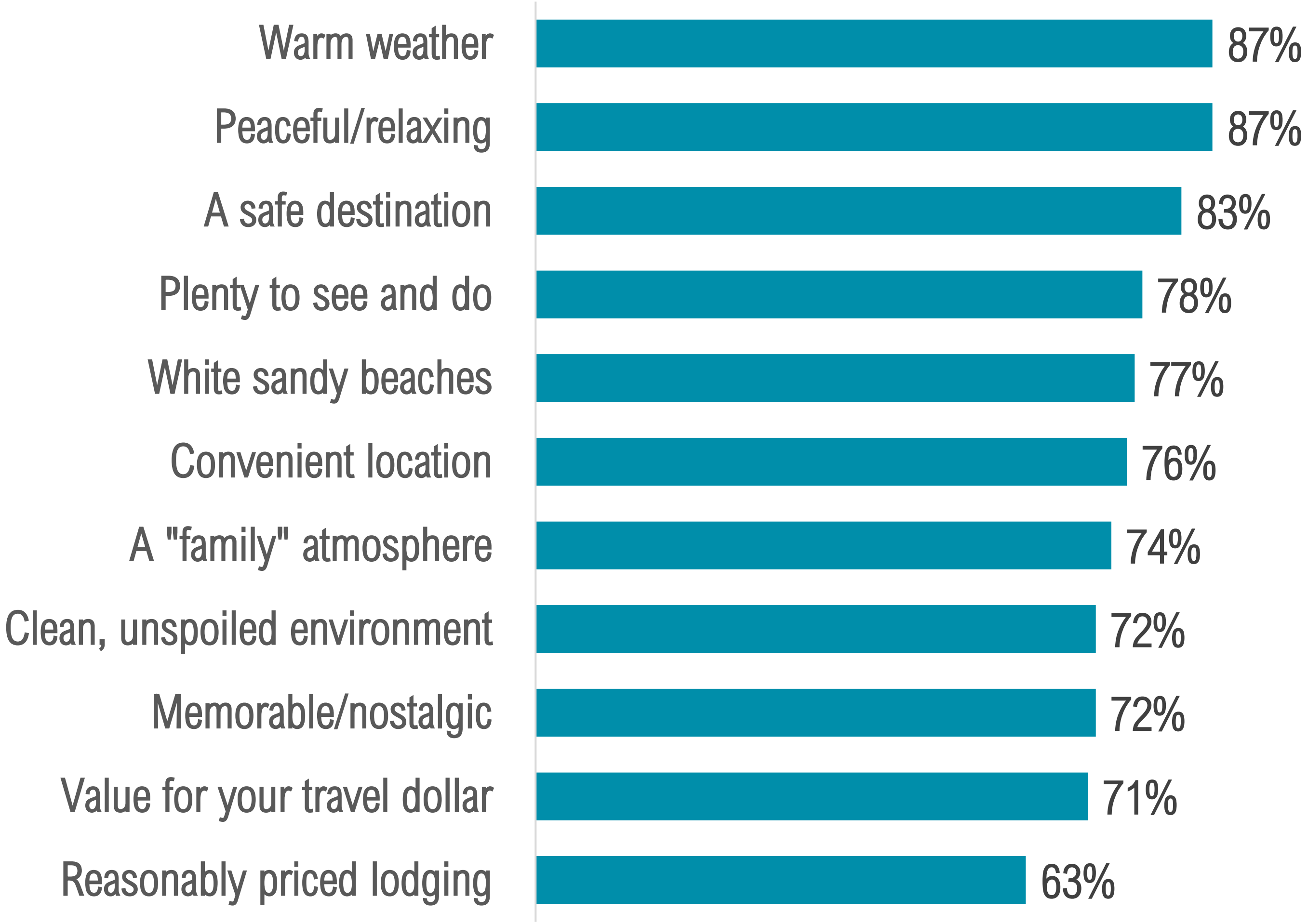
39% of visitors considered choosing other destinations when planning their trips.



[1]Multiple responses permitted.

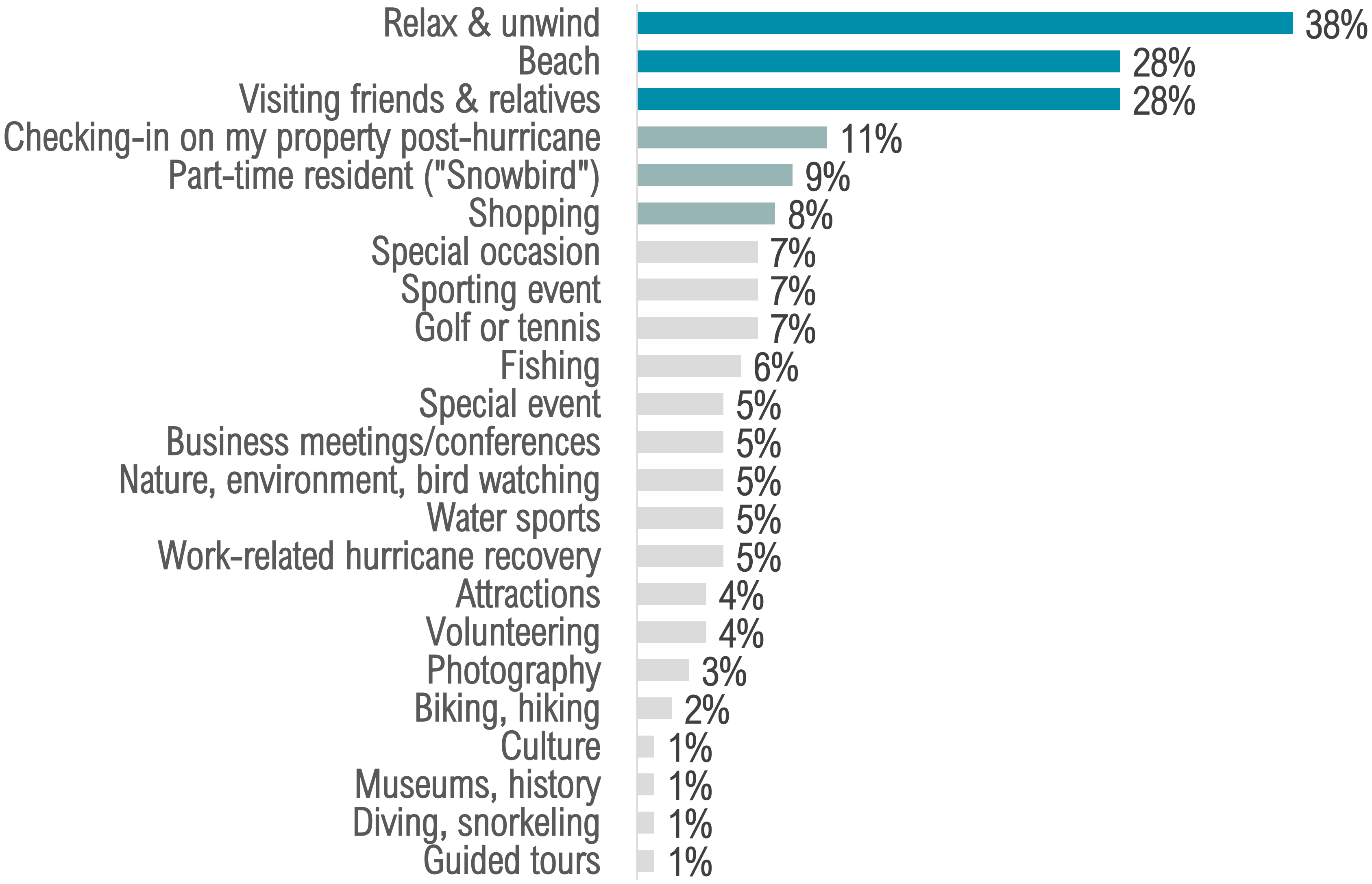
TRIP INFLUENCERS[1]

Nearly **9 in 10** visitors were heavily influenced by the Fort Myers area being **warm** and **peaceful/relaxing** 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]



Pre-Visit
Calendar Year 2023

[1]Three responses permitted.

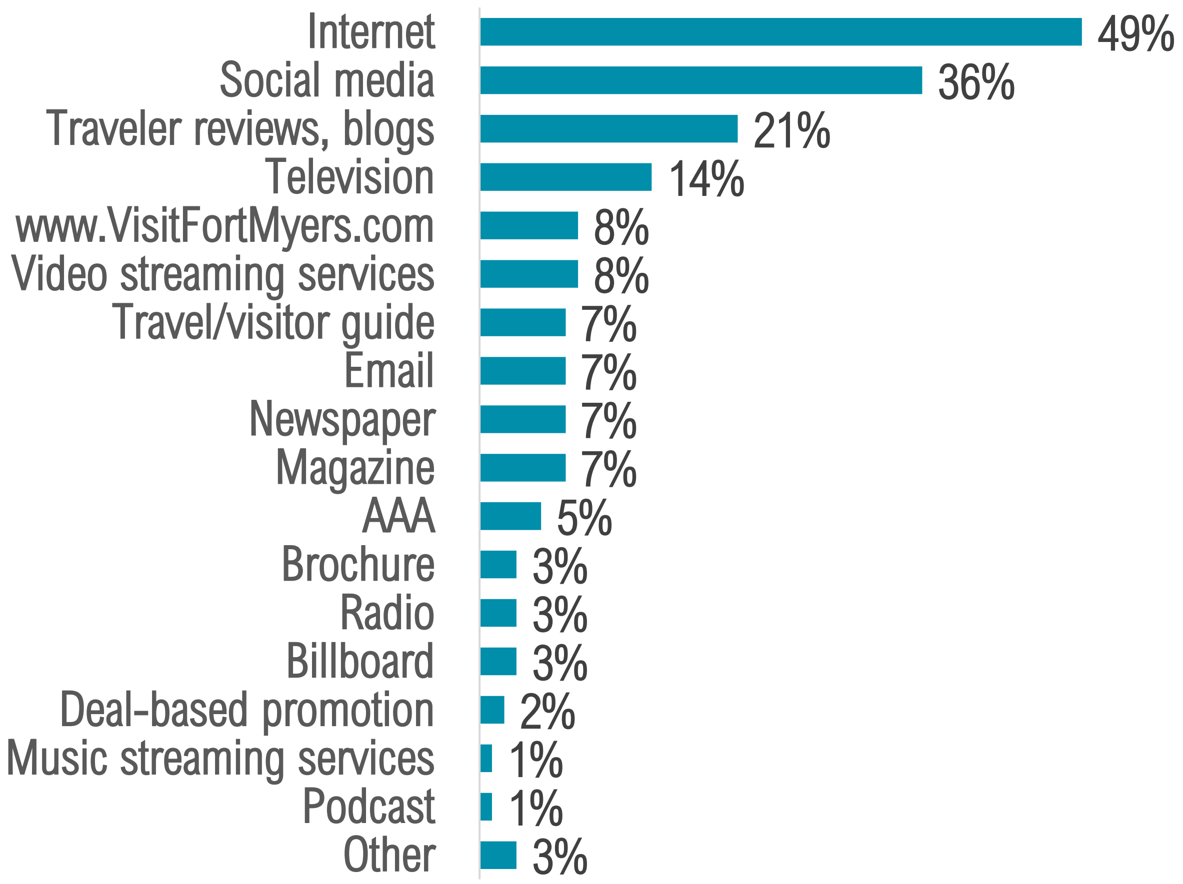
PROMOTIONS[1]

43% of visitors recalled promotions for the Fort Myers area, primarily on the Internet or social media.

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

BASE: 43% of visitors who recalled promotions

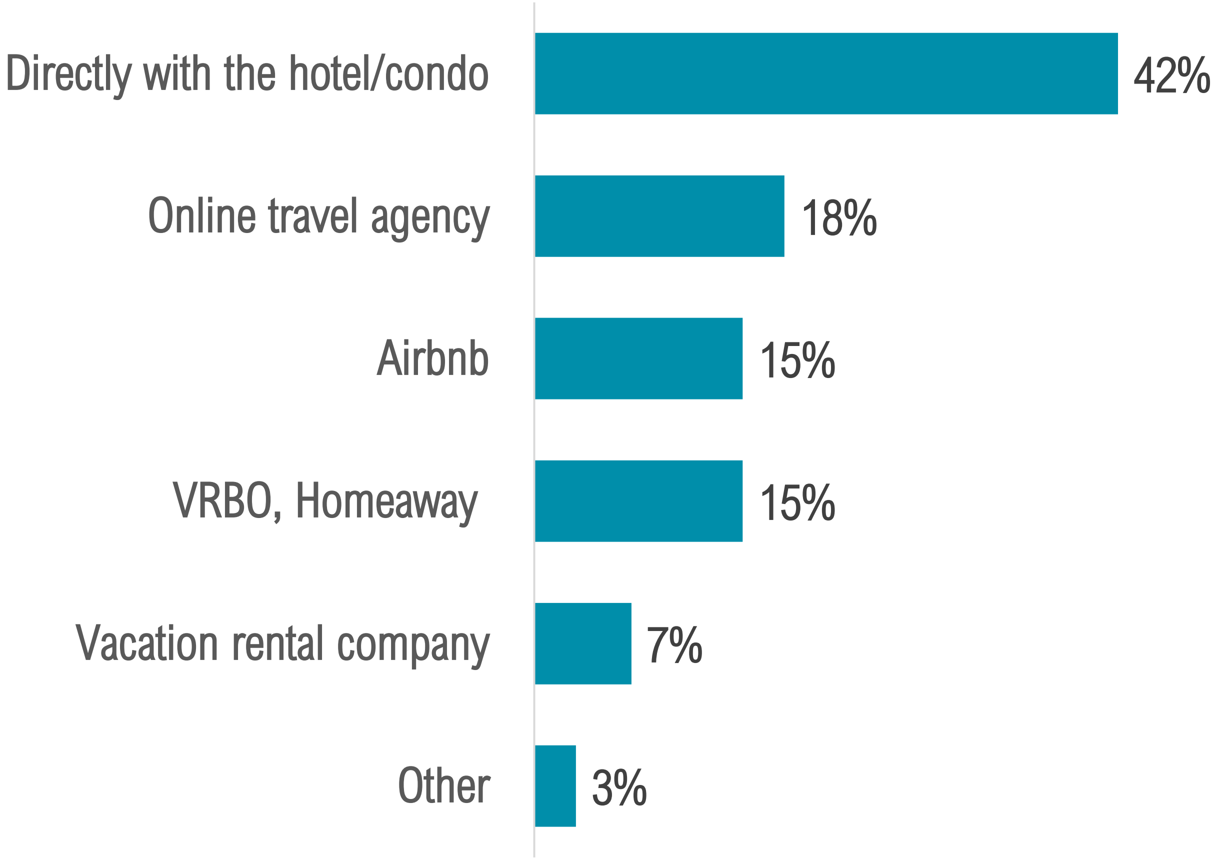
Source of Promotion



[1]Multiple responses permitted.

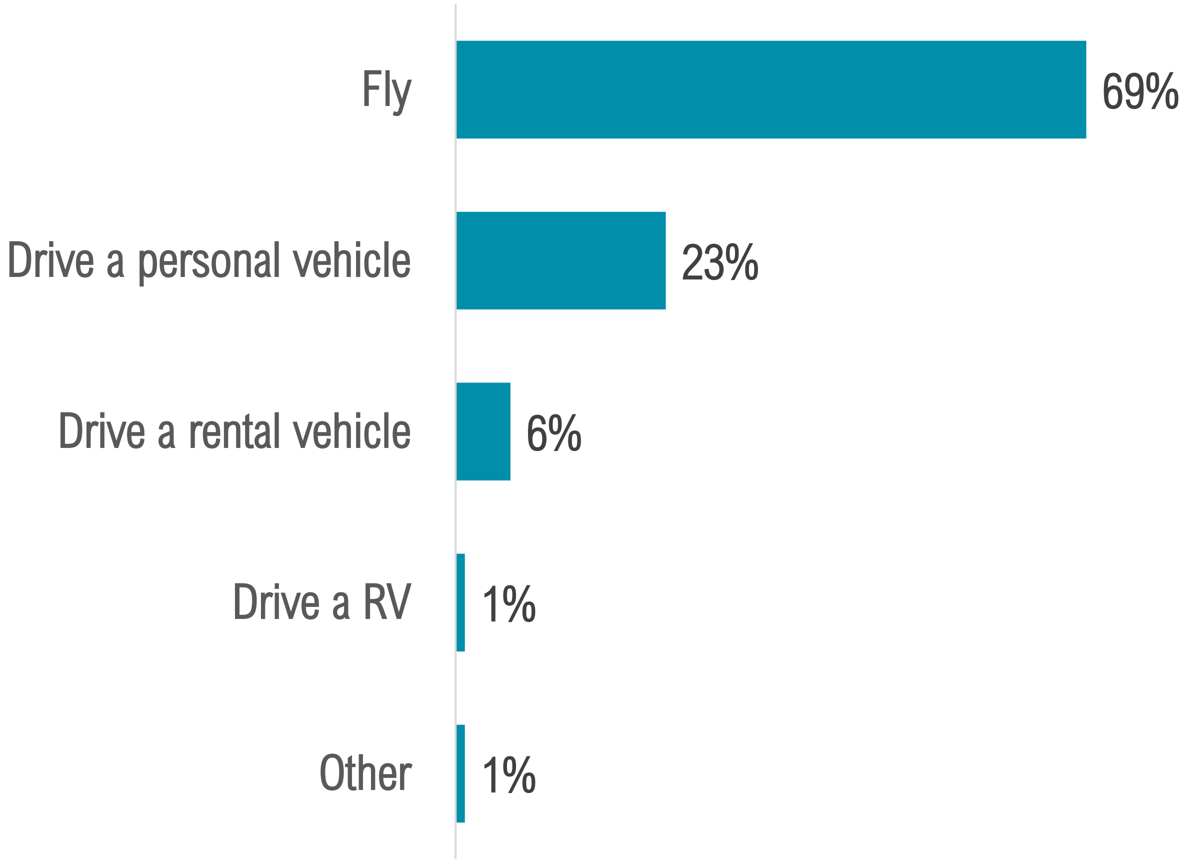
BOOKING

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



TRANSPORTATION

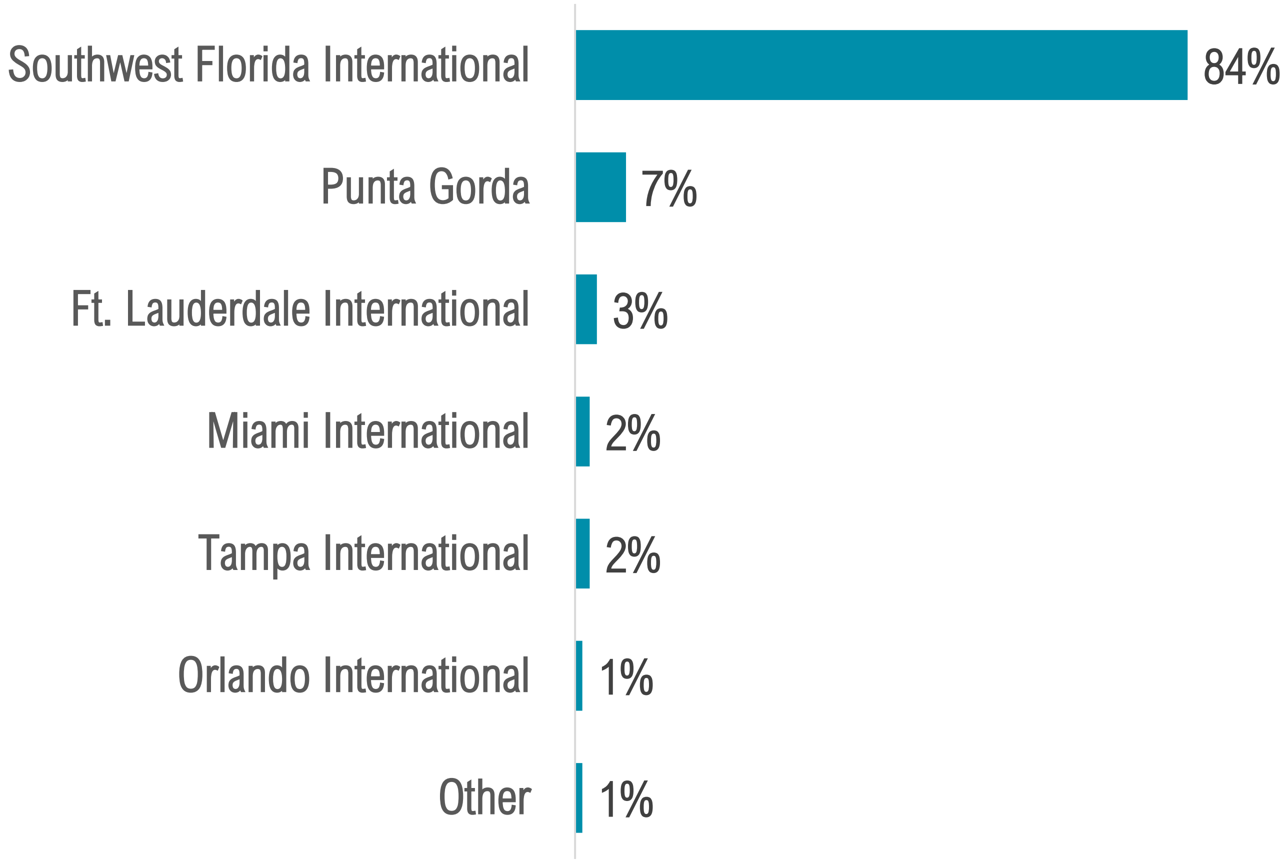
Nearly 7 in 10 visitors **flew** to the Fort Myers area.



AIRPORT

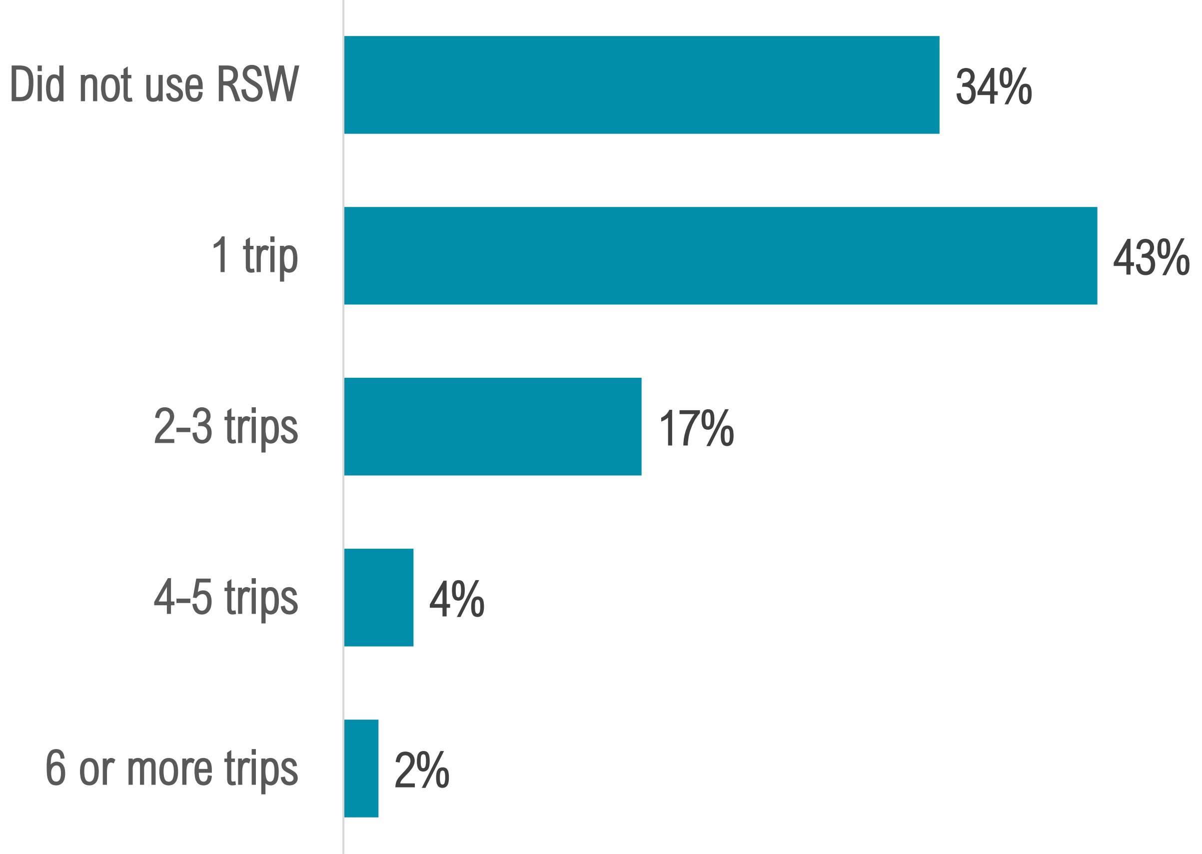
Over 4 in 5 visitors who flew to the Fort Myers area came through RSW.

BASE: 69% of visitors who flew



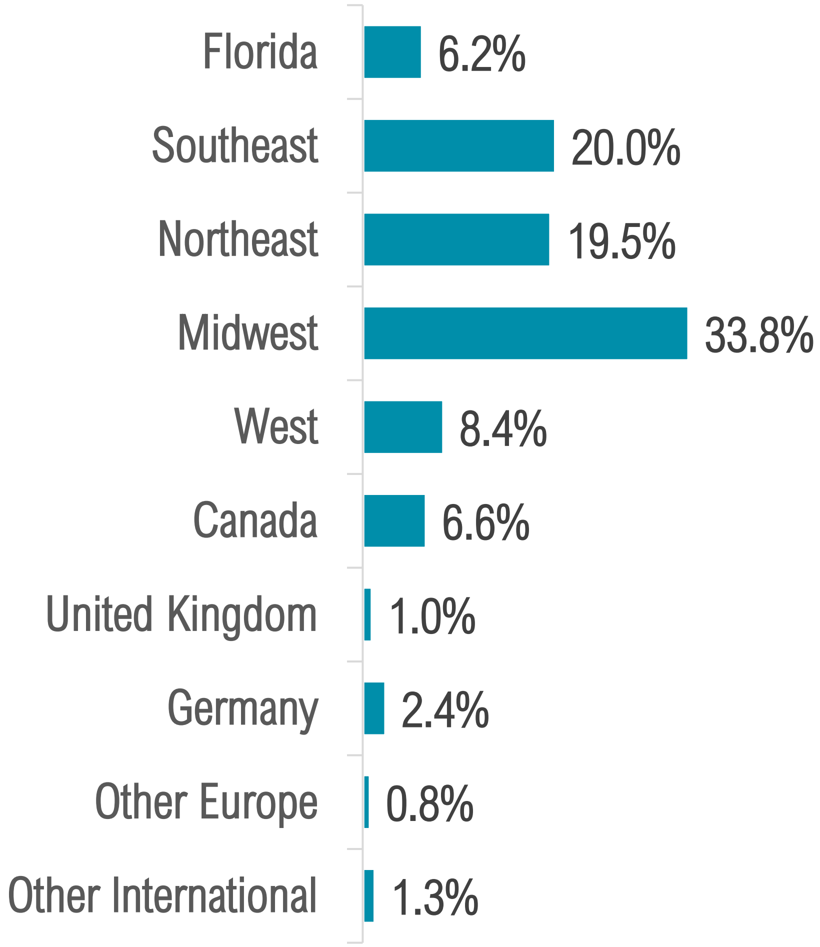
USE OF RSW IN THE PAST YEAR

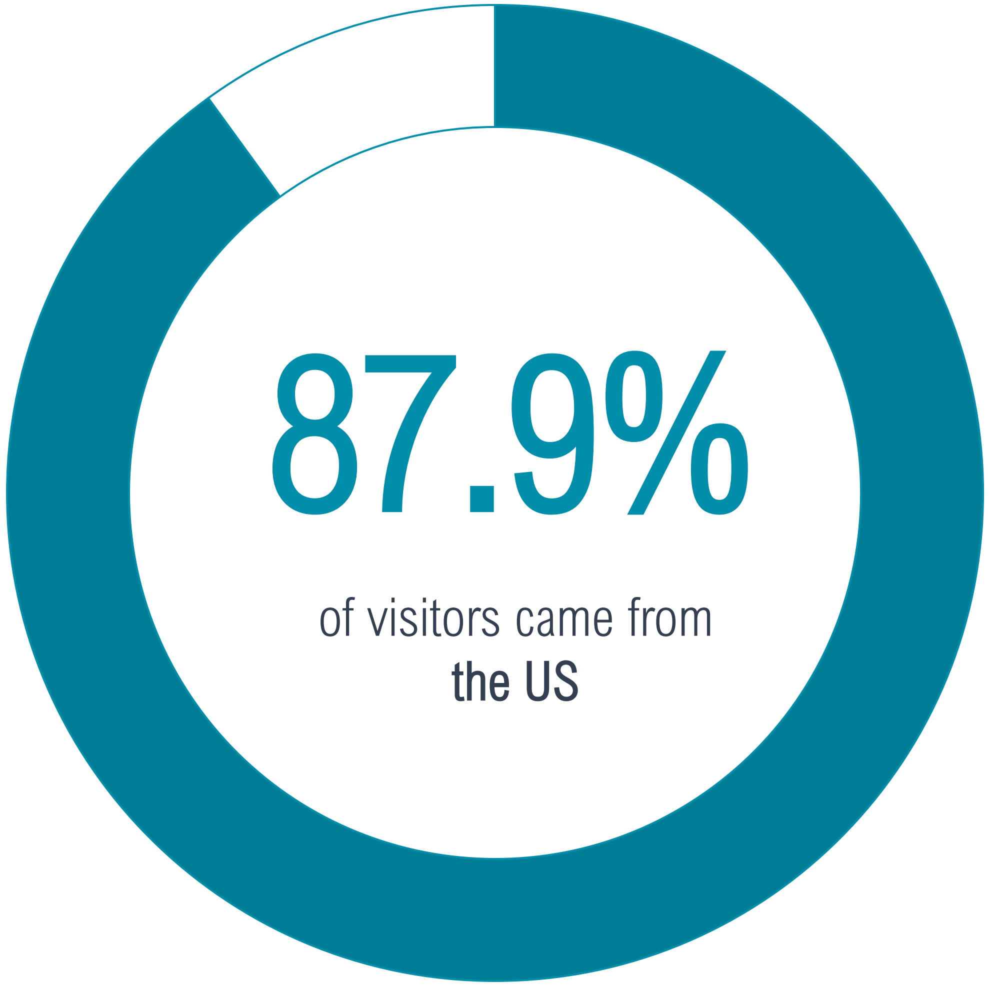
66% of visitors used RSW at least once in the past year.



VISITOR JOURNEY: TRAVEL PARTY PROFILE

ORIGIN[1]

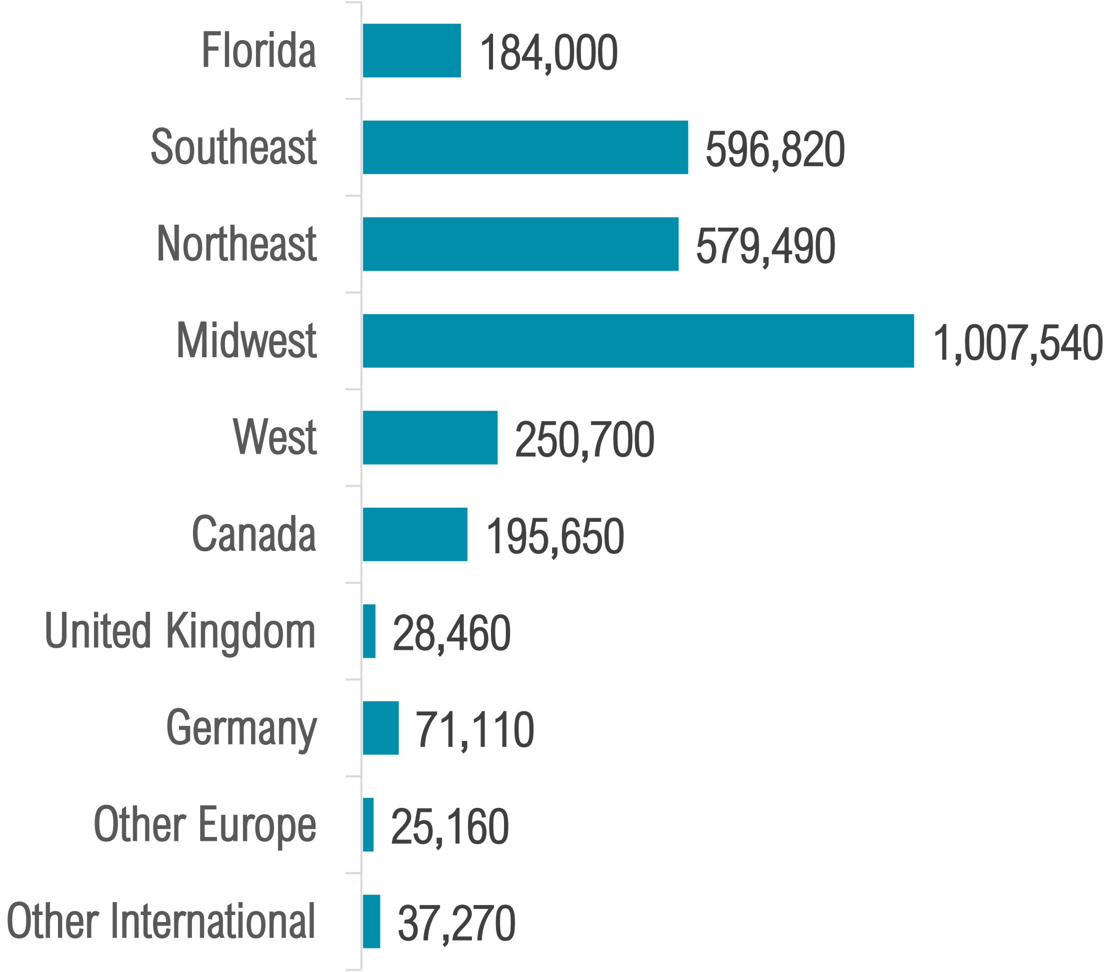




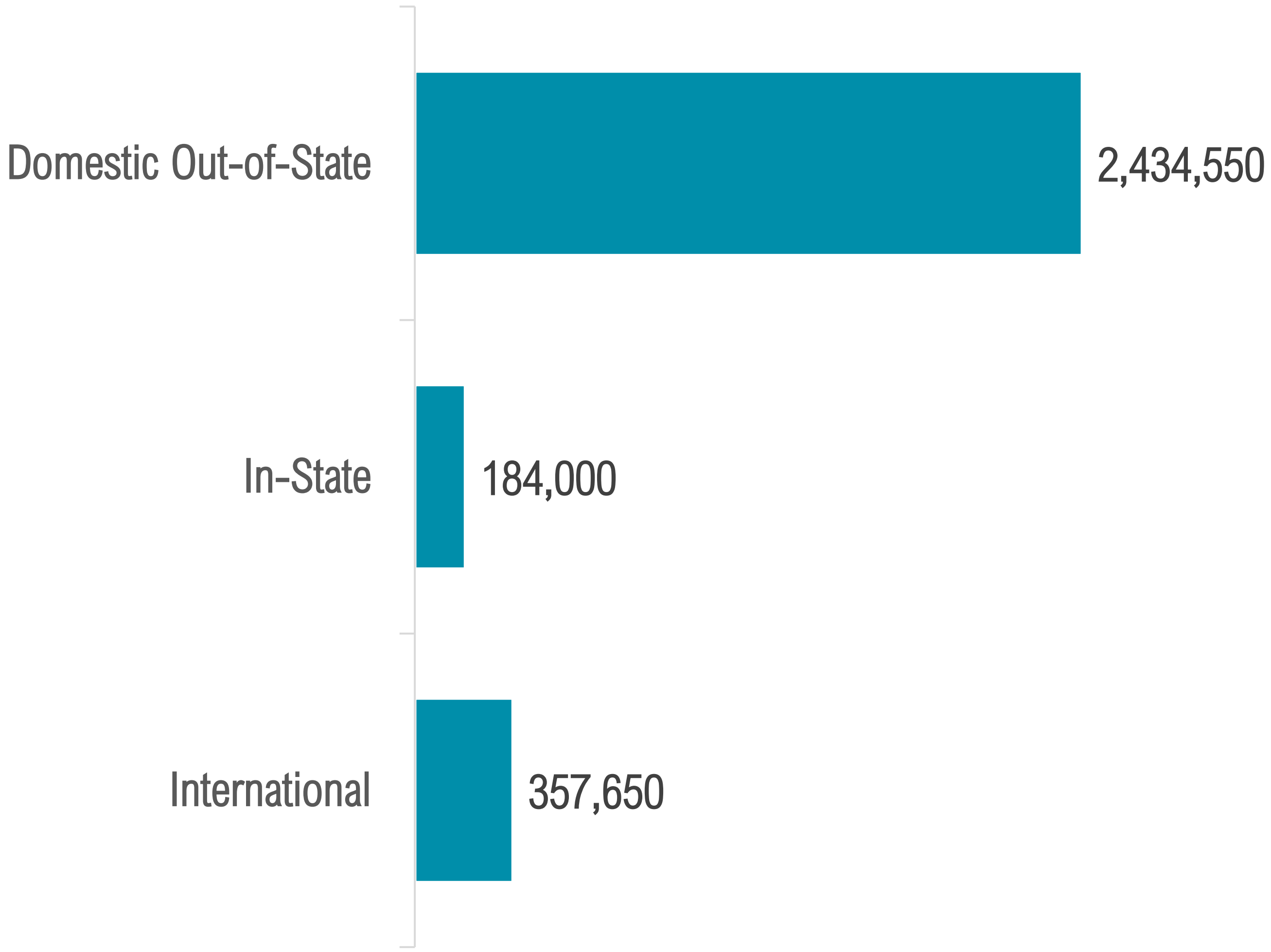
[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers.

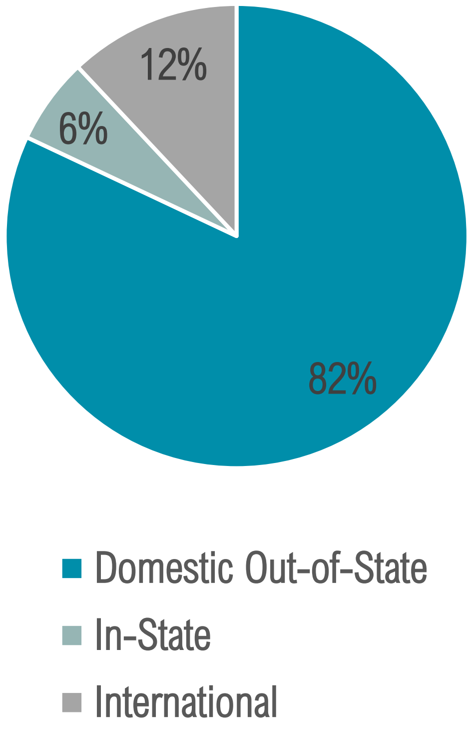
NUMBER OF VISITORS BY ORIGIN

Total of 2,976,200 visitors in 2023.

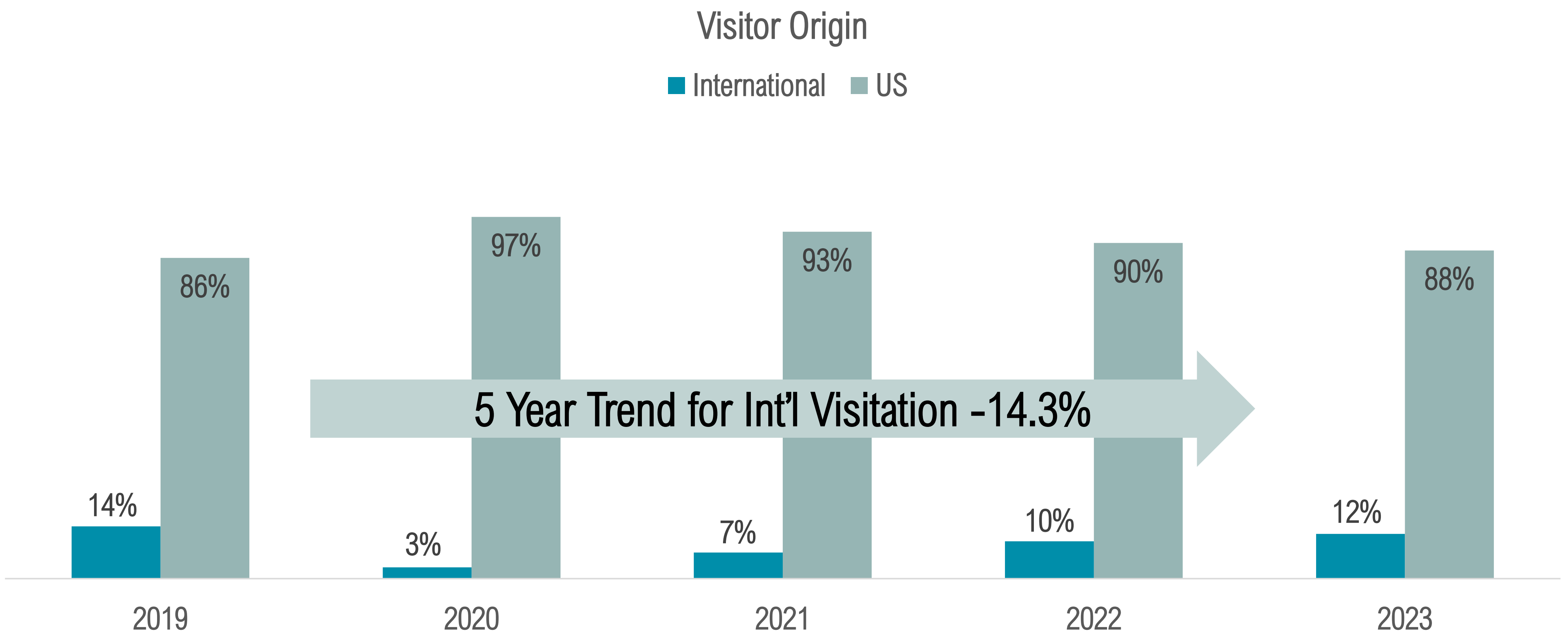


Number Of Visitors By Origin





5 YEAR TREND: US VS. INTERNATIONAL VISITATION



5 YEAR TREND: ORIGIN

Country	2019	2020	2021	2022	2023
Florida	10%	11%	6%	7%	6%
Southeast	12%	17%	19%	19%	20%
Northeast	21%	20%	17%	18%	20%
Midwest	38%	42%	43%	38%	34%
West	5%	7%	8%	8%	8%
International	14%	3%	7%	10%	12%

ORIGIN COUNTRY

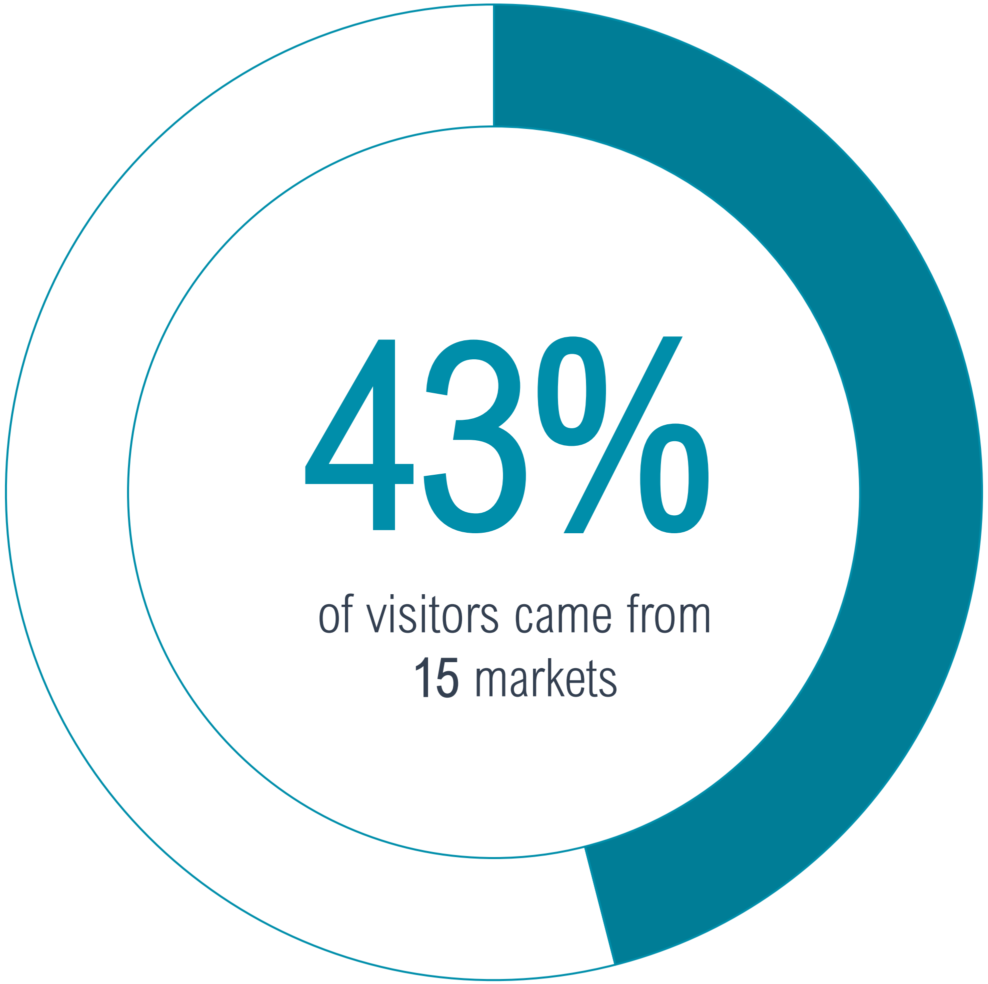
Country	% of Visitors
United States	87.9%
Canada	6.6%
UK	1.0%
Germany	2.4%
Other	2.1%

5 YEAR TREND: ORIGIN COUNTRY

Country	2019	2020	2021	2022	2023
United States	86%	97%	93%	90%	88%
Canada	4%	2%	3%	5%	7%
Germany	4%	<1%	1%	1%	1%
United Kingdom	2%	<1%	1%	2%	2%
Other	4%	<1%	2%	2%	2%

TOP ORIGIN MARKETS[1]

Market	Percentage of Visitors
New York	6%
Chicago	4%
Atlanta	4%
Minneapolis - St Paul	3%
Detroit	3%
Cleveland - Akron	3%
Boston	3%
Washington, DC - Hagerstown	3%
Cincinnati	2%
Philadelphia	2%
Denver	2%
Indianapolis	2%
Milwaukee	2%
Naples & Surrounding Areas	2%
Nashville	2%



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

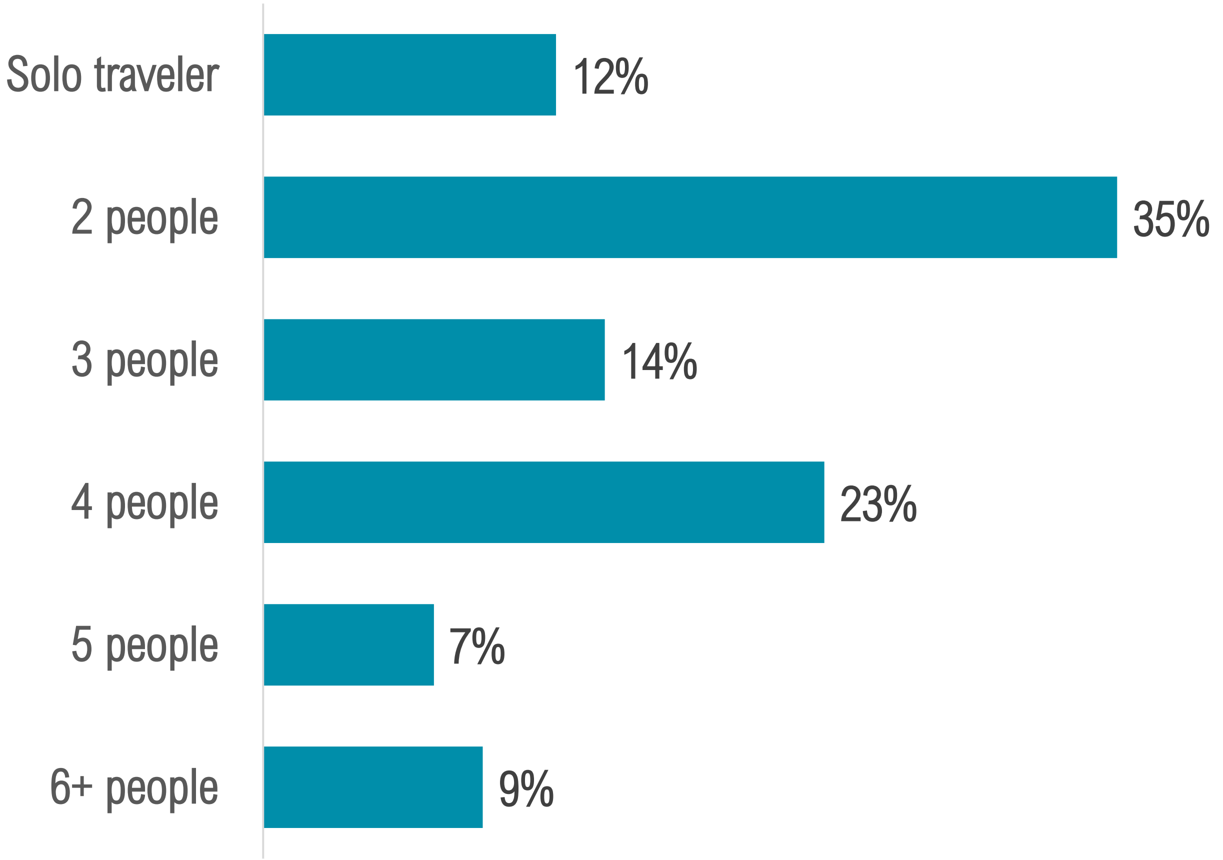
TRAVEL PARTY SIZE AND COMPOSITION

Travel Party Size

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

Travel with Children

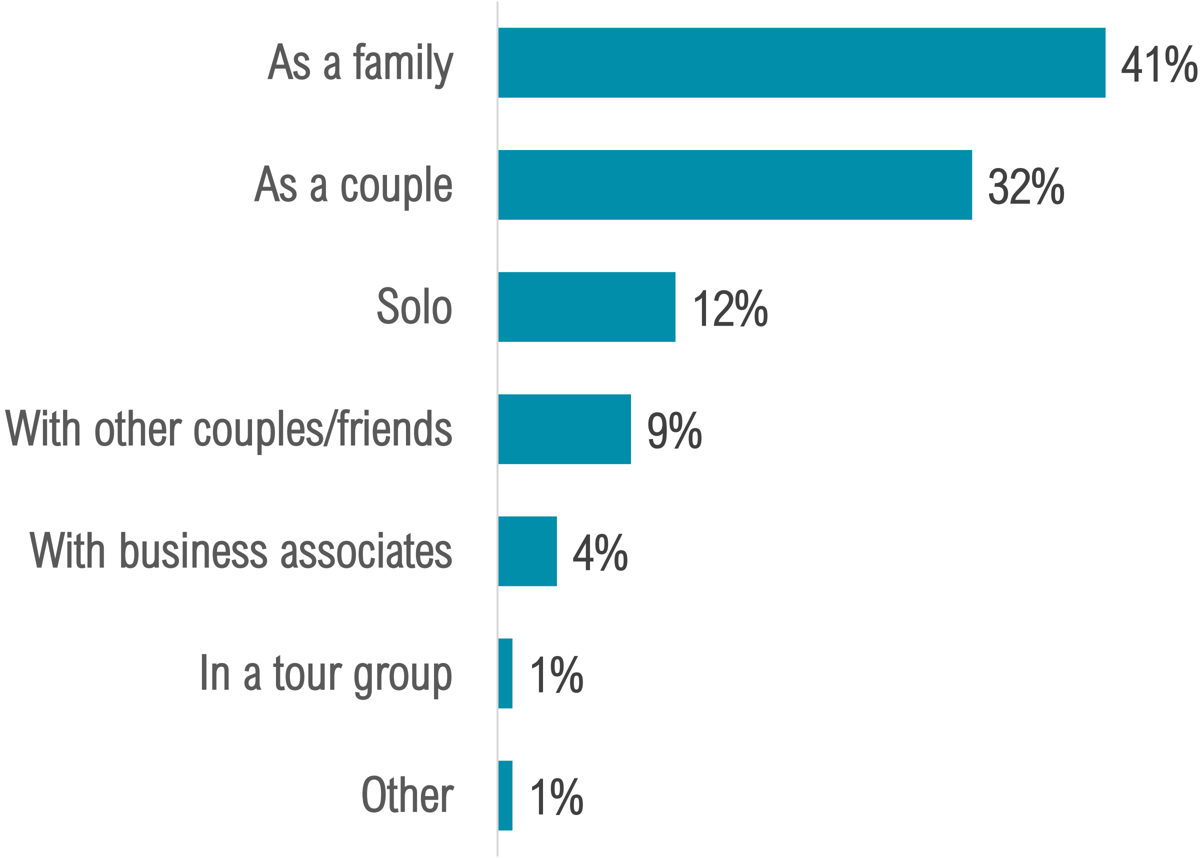
35% of visitors traveled with children under the age of 18.



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

TRAVEL PARTY TYPE

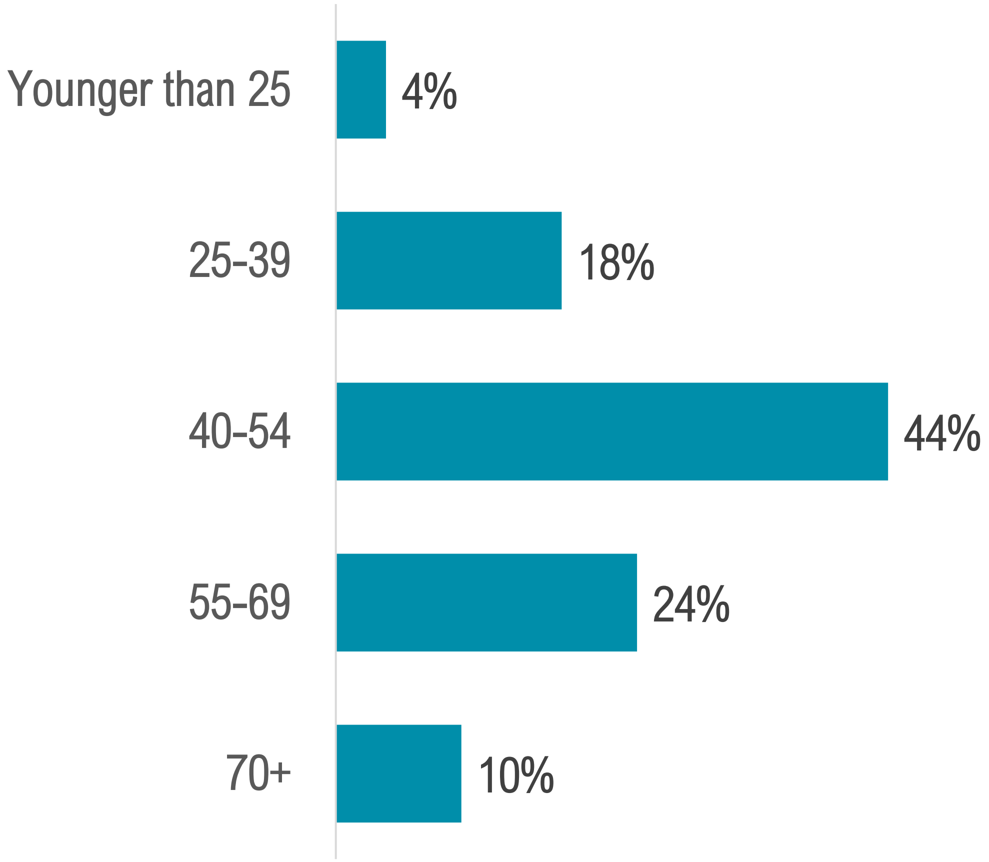
Visitors primarily traveled as a family or as a couple.



AGE

Median Age

The median age of 2023 visitors was **50 years old.**

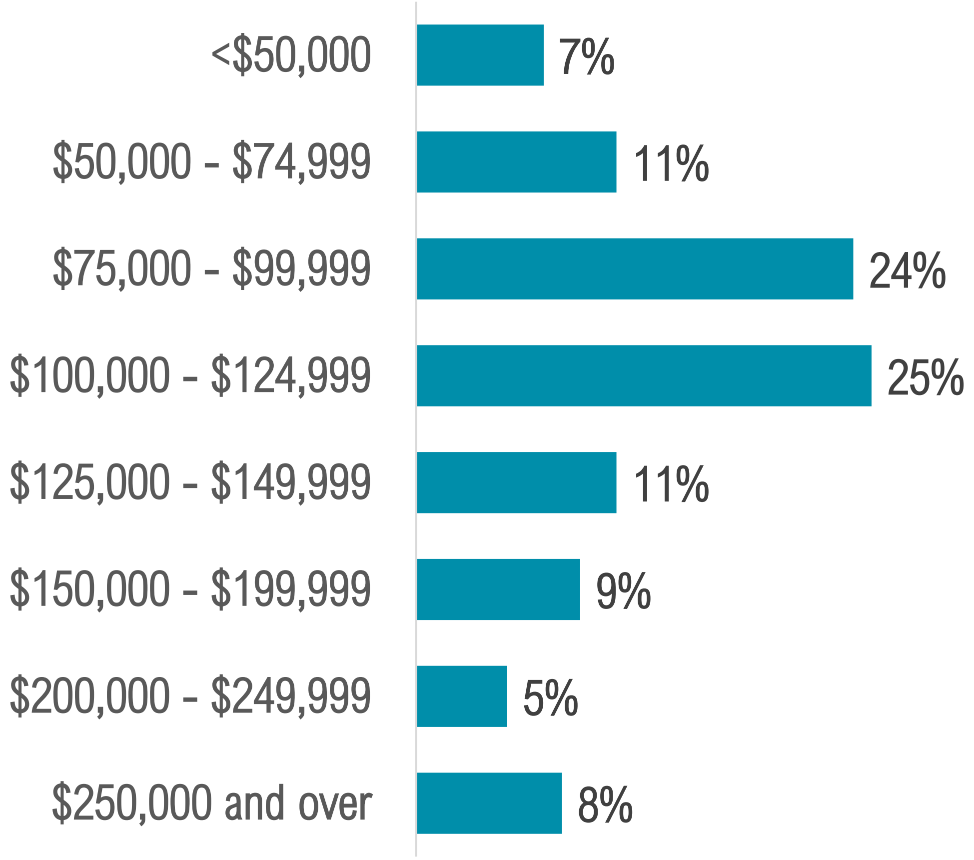


HOUSEHOLD INCOME

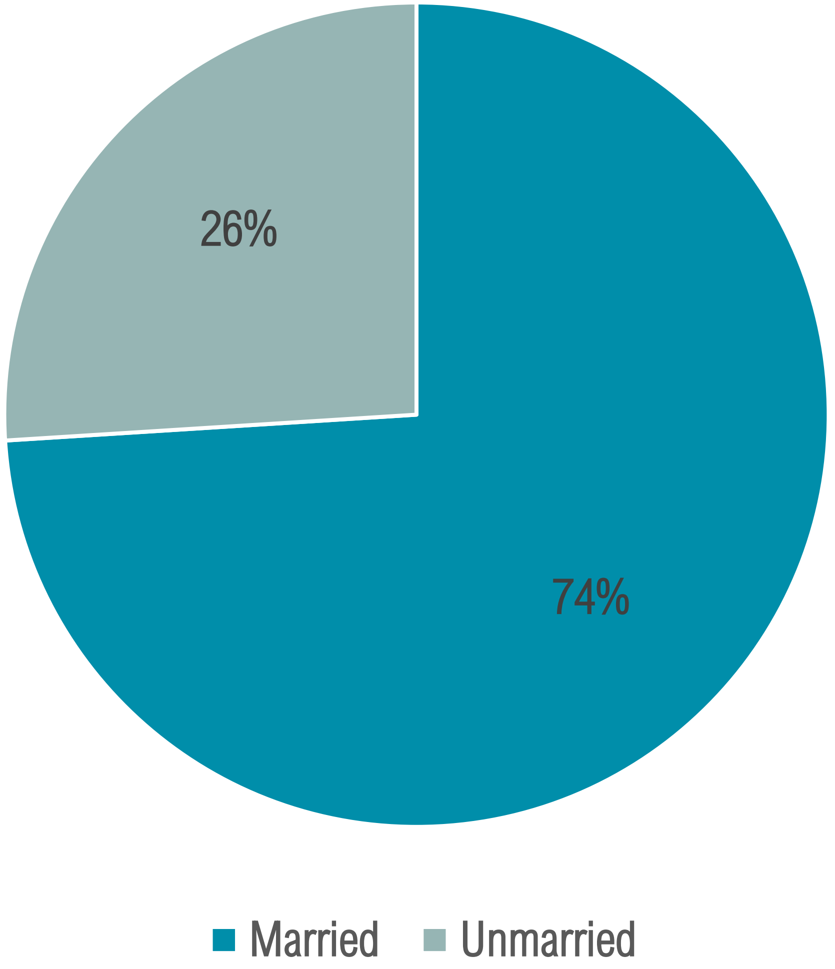
Median Household Income

2023 visitors had a median household income of **$108,000.**

13% of visitors earned more than **$200,000.**

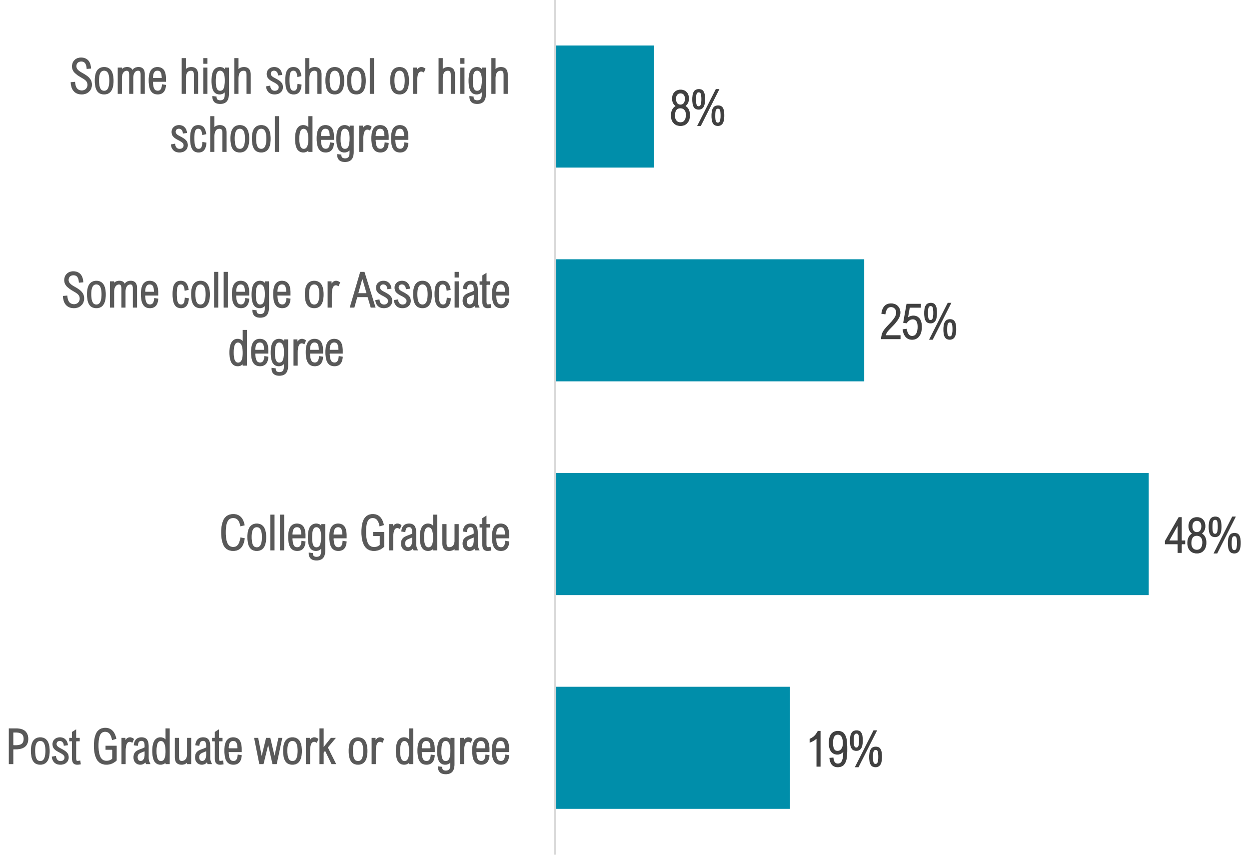


MARITAL STATUS

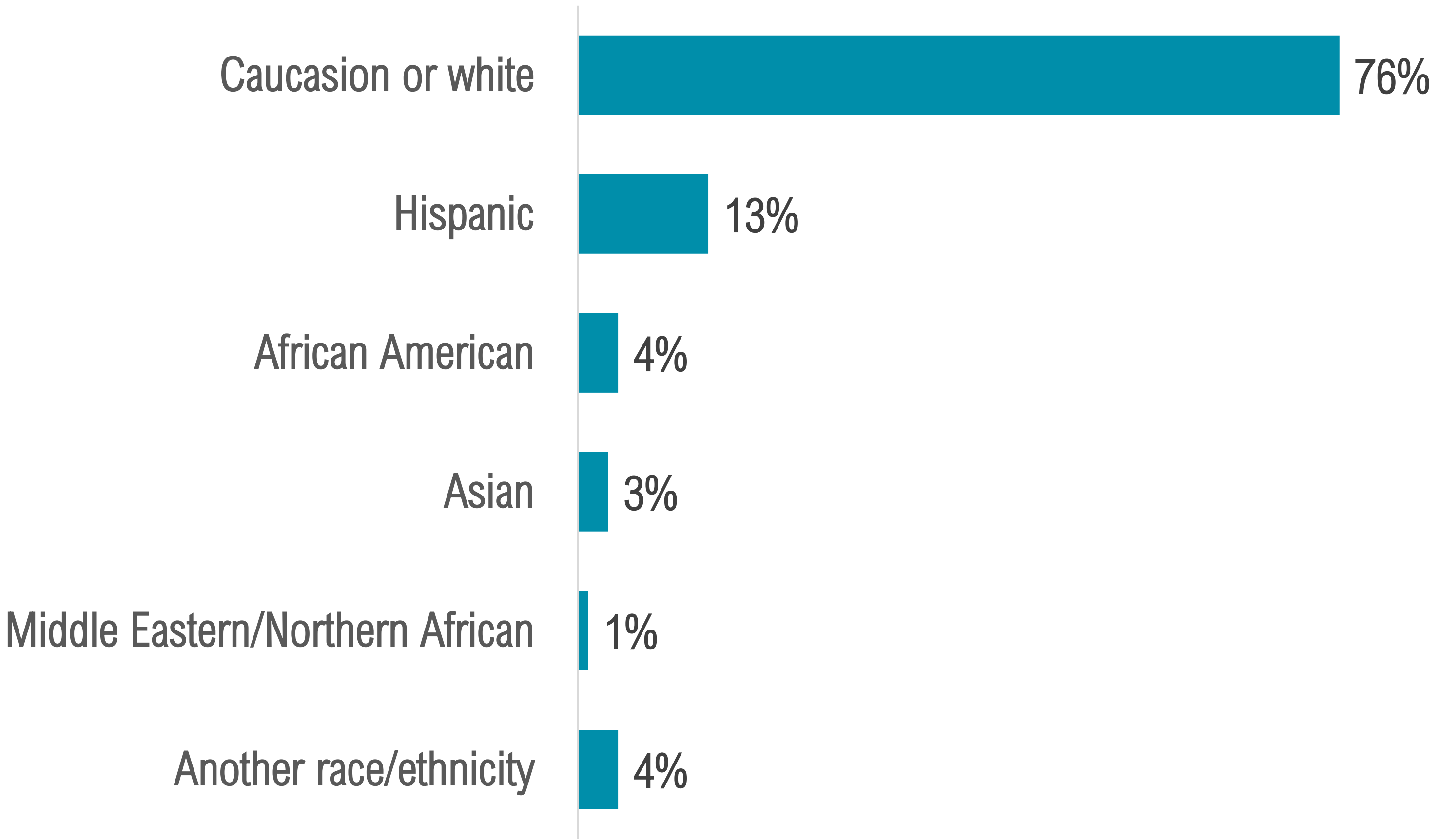


EDUCATION

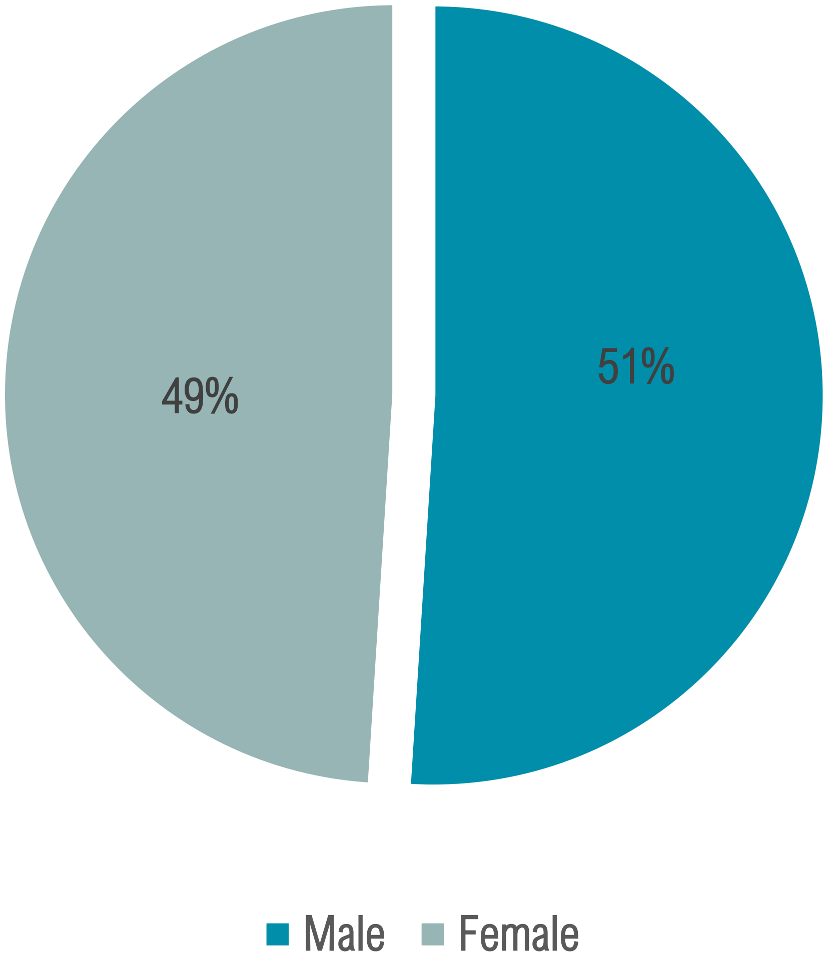
College Education
67% of 2023 visitors were college graduates.



RACE/ETHNICITY



GENDER[1]



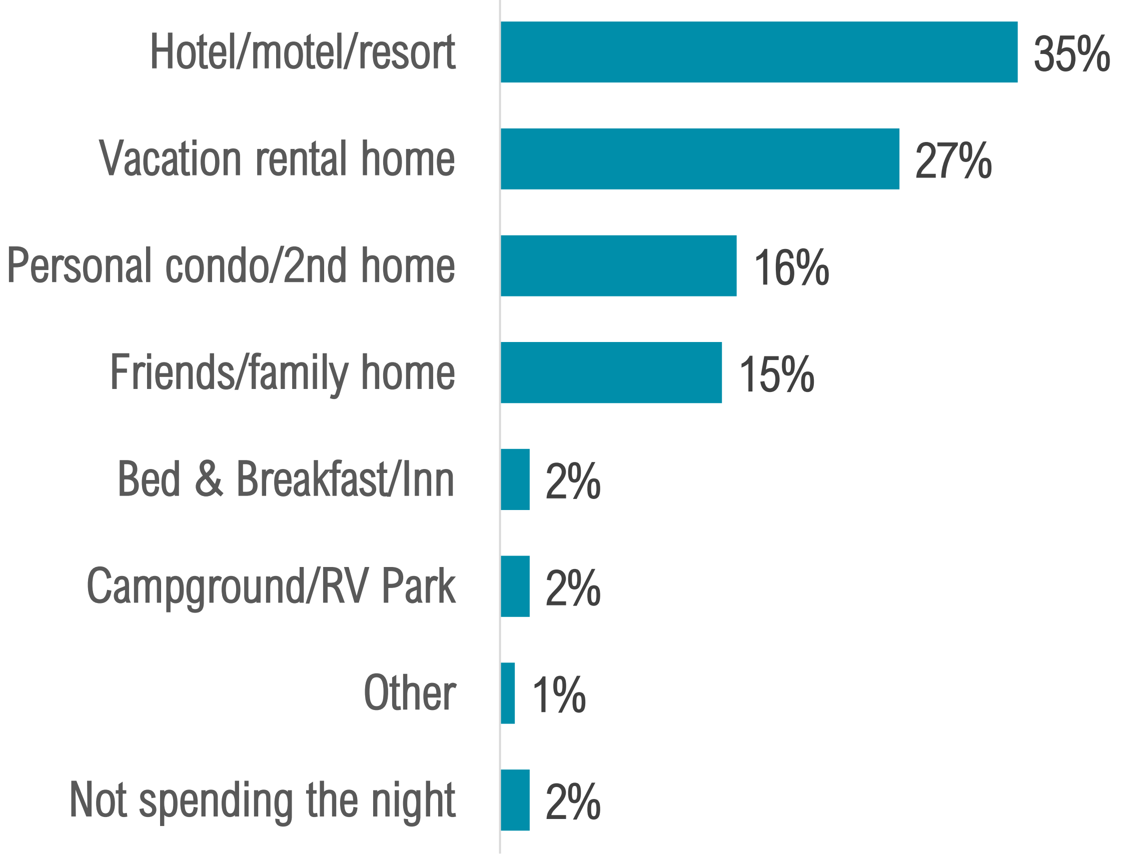
[1] Of person interviewed. Females are generally more likely to respond to surveys.

VISITOR JOURNEY: TRIP EXPERIENCE

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

ACCOMMODATIONS

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



NIGHTS STAYED[1]

All Visitors

Visitors spent 6.5[1] nights in the Fort Myers area.

Visitors Staying in Paid Accommodations

Visitors staying in paid accommodations spent 6.2[1] nights in the Fort Myers area.

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

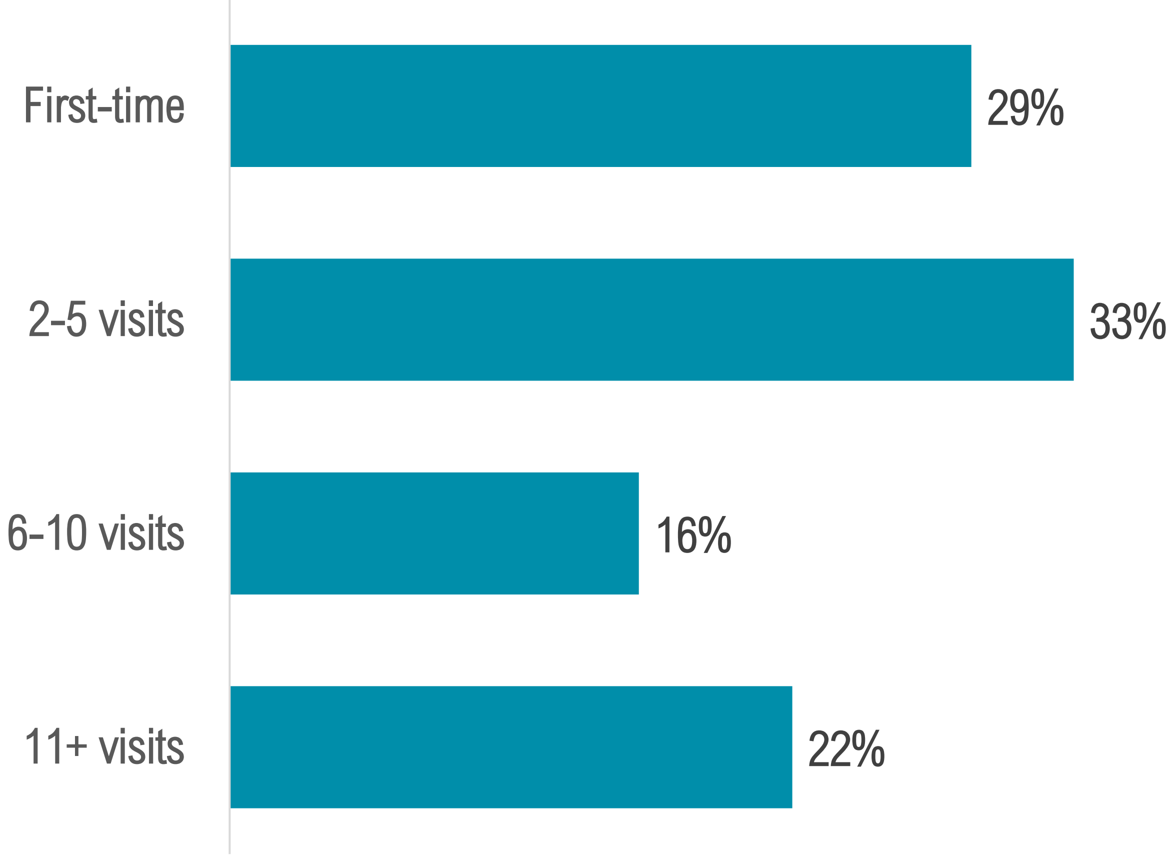
FIRST TIME AND EXPERIENCED VISITORS

First Time vs. Repeat Visitors

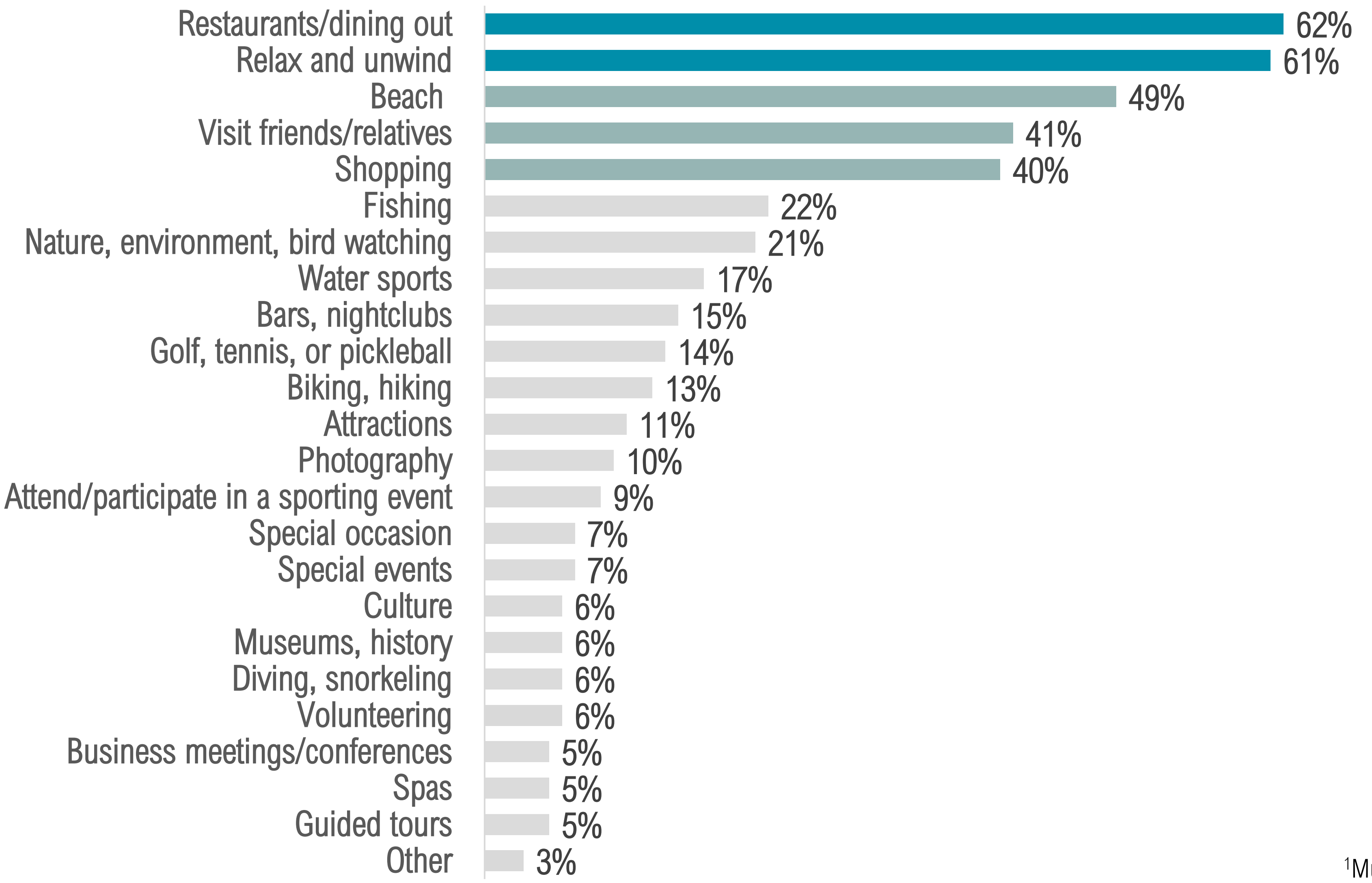
71% of visitors had previously visited the Fort Myers area, while 29% were visiting for the first time.

First Time vs. Repeat Visitors

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

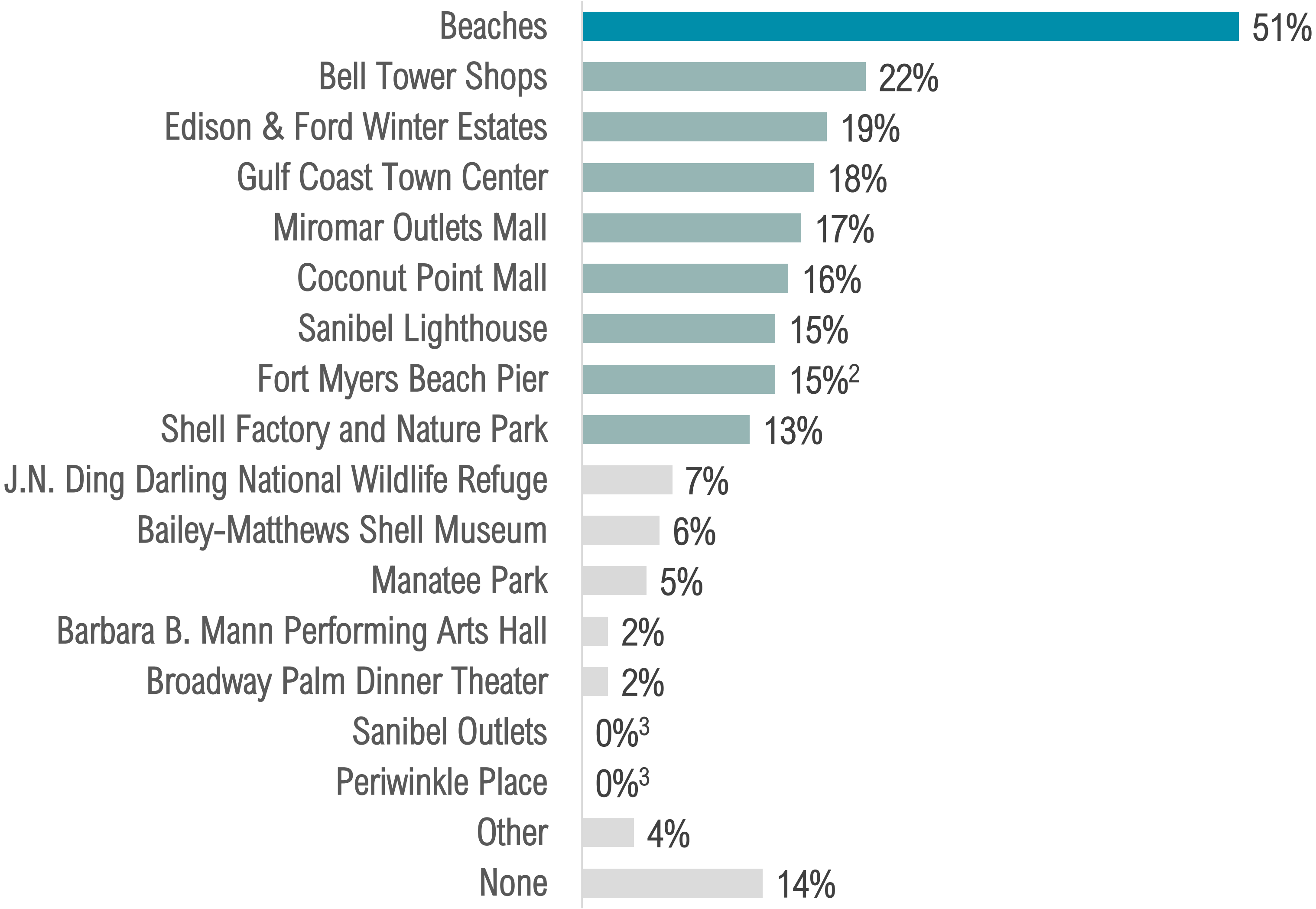


VISITOR ACTIVITIES[1]



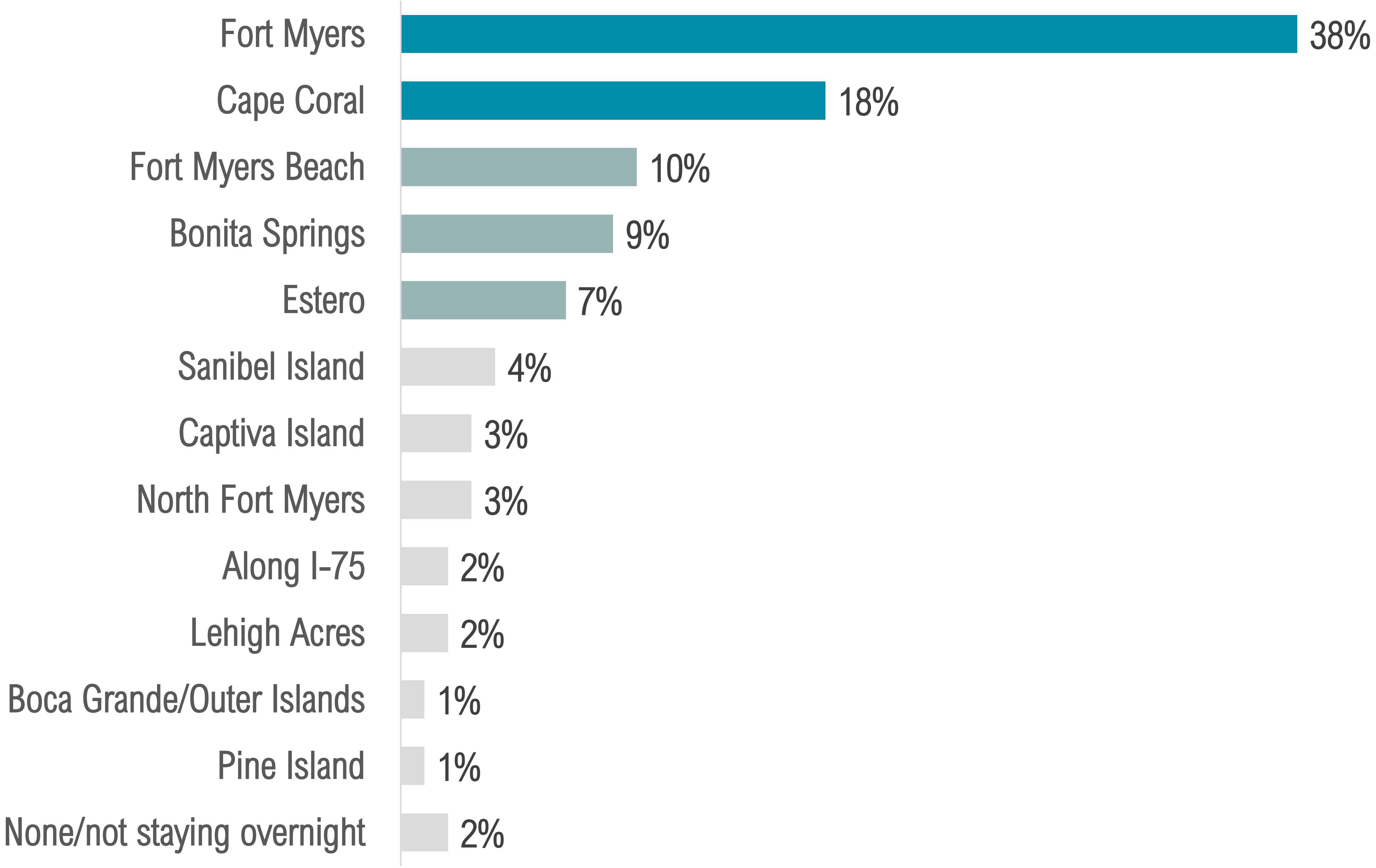
[1]Multiple responses permitted.

ATTRACTIONS VISITED[1]



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

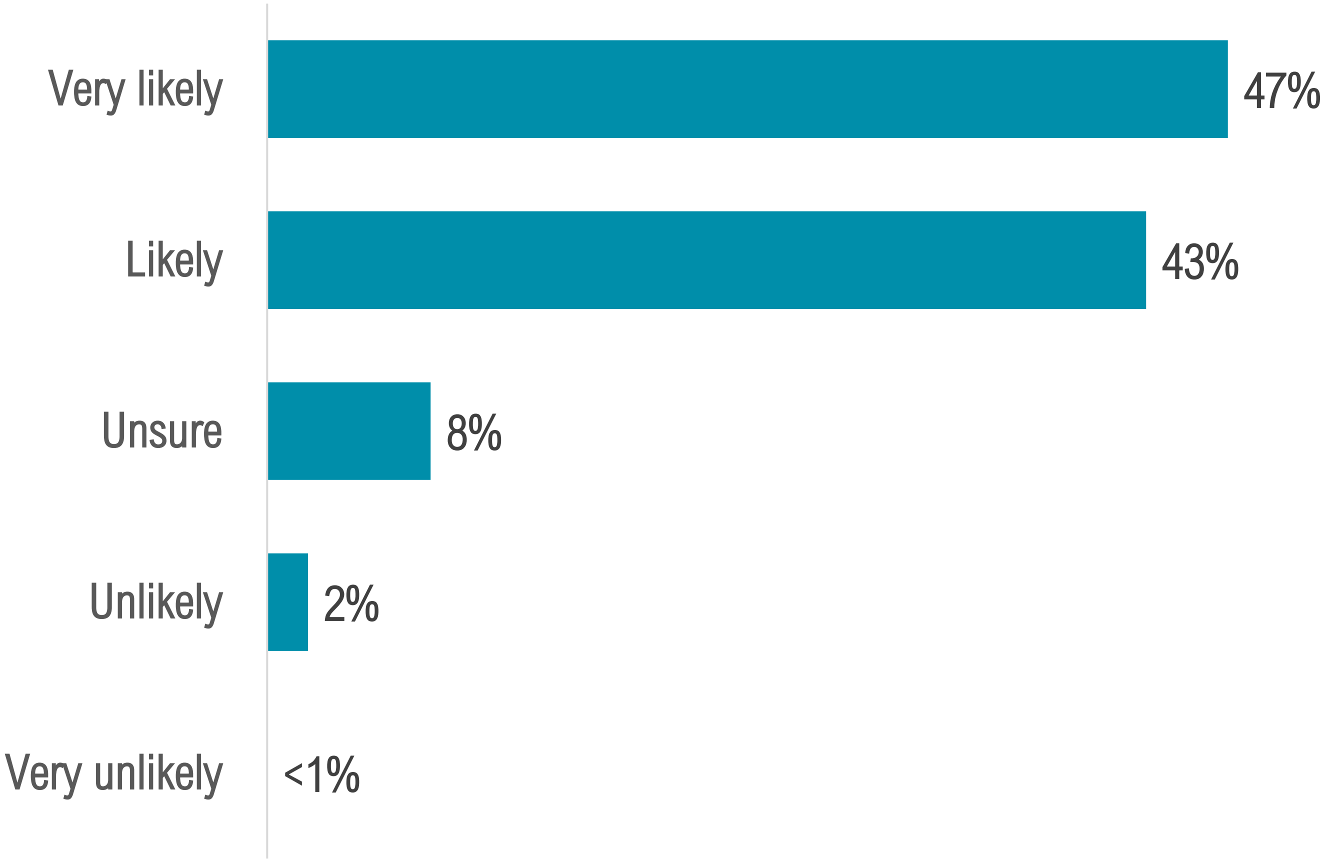
COMMUNITY STAYED



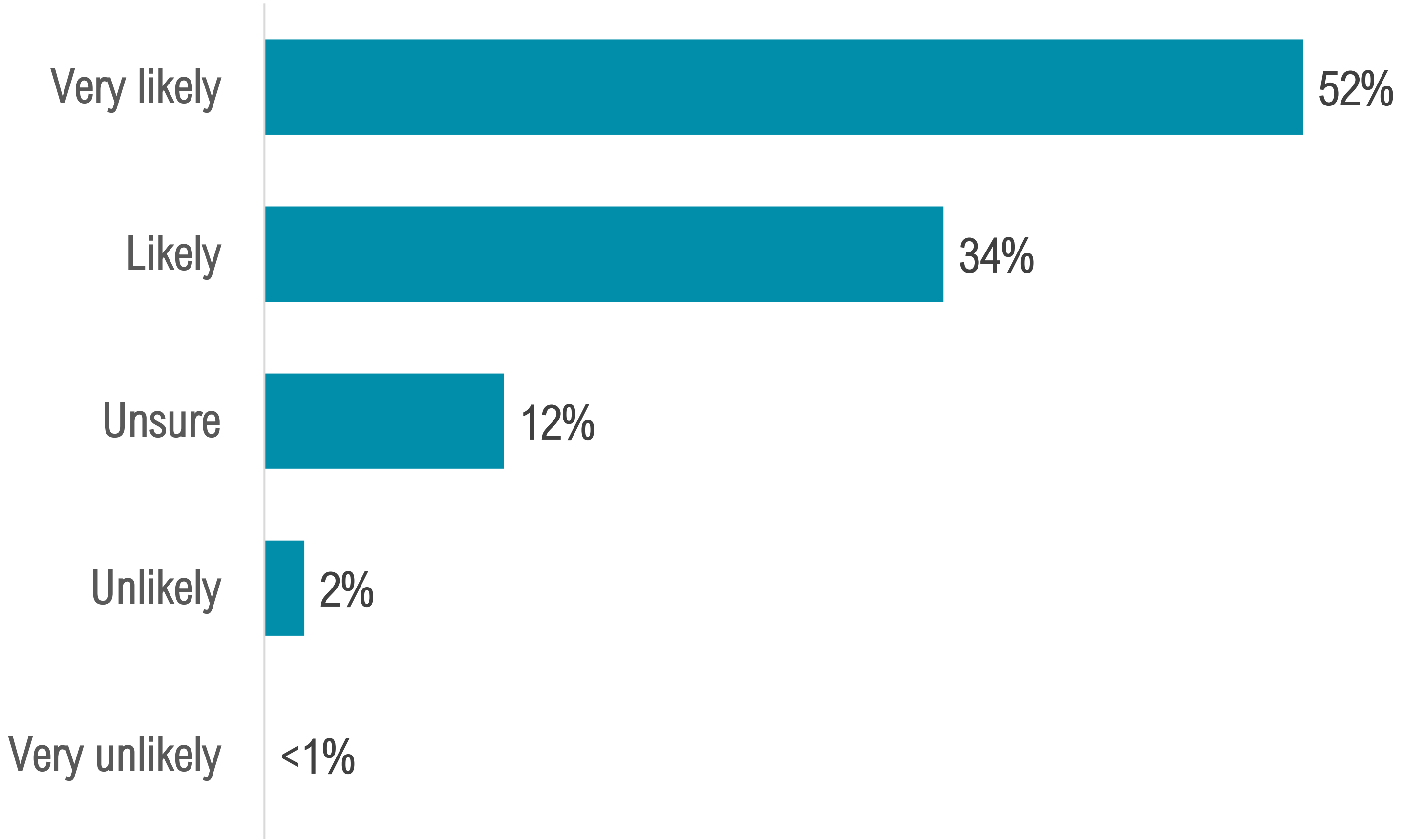
VISITOR JOURNEY: POST-TRIP EVALUATION

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

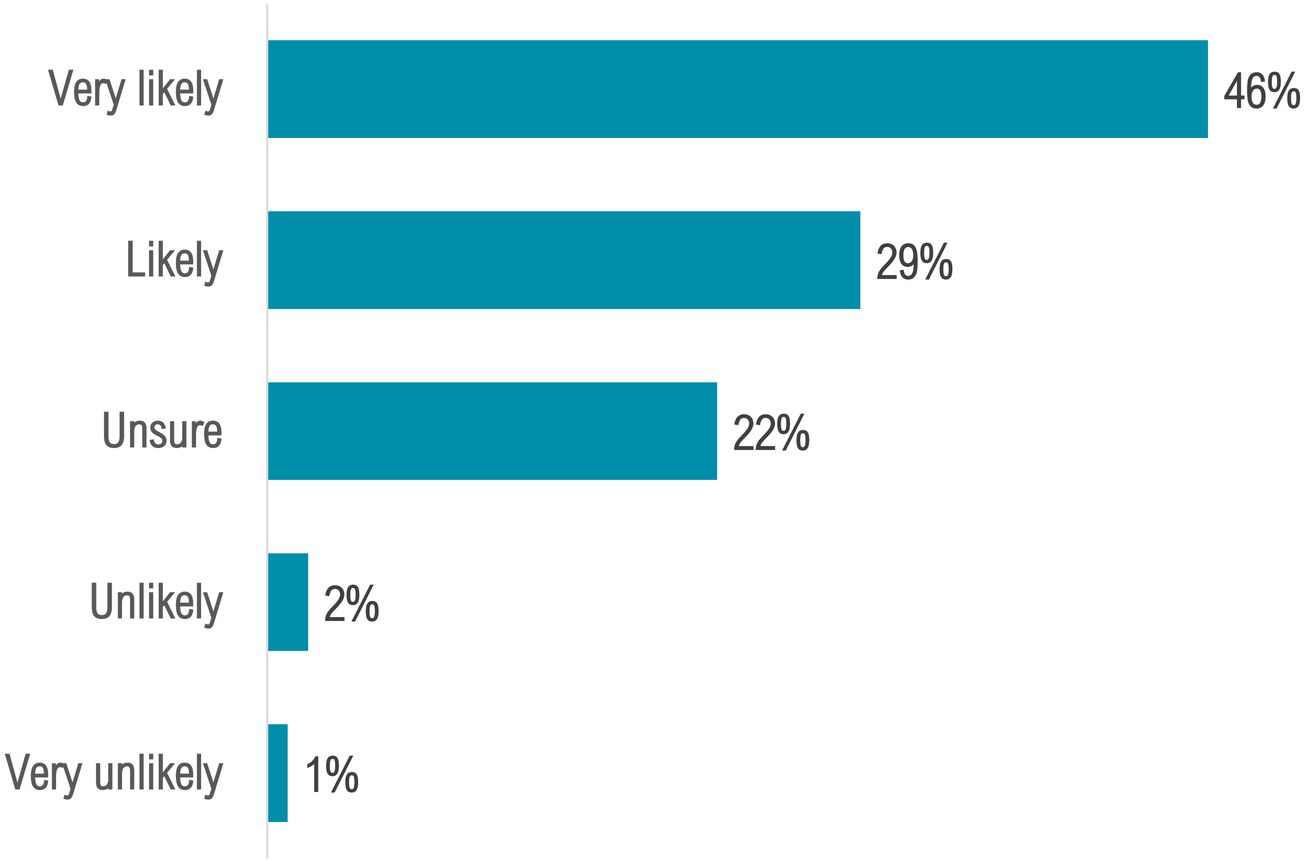
LIKELIHOOD OF RECOMMENDING THE AREA



LIKELIHOOD OF RETURNING TO THE AREA



LIKELIHOOD OF RETURNING NEXT YEAR



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">91%</td><td>40%</td><td rowspan="2">94%</td><td>50%</td><td rowspan="2">93%</td><td>46%</td><td rowspan="2">95%</td><td>54%</td></tr>
<tr><td>Likely</td><td>40%</td><td>43%</td><td>44%</td><td>38%</td></tr>
<tr><td>Unsure/don’t know</td><td>5%</td><td>15%</td><td>3%</td><td>6%</td><td>4%</td><td>8%</td><td>3%</td><td>5%</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">3%</td><td>2%</td><td rowspan="2">2%</td><td>3%</td></tr>
<tr><td>Very Unlikely</td><td>1%</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	73%	38%	92%	58%	83%	50%	85%	63%
Likely		33%		34%		36%		25%
Unsure/don't know	12%	22%	3%	8%	6%	11%	7%	9%
Unlikely	15%	6%	5%	0%	11%	2%	8%	2%
Very Unlikely		1%		0%		1%		1%

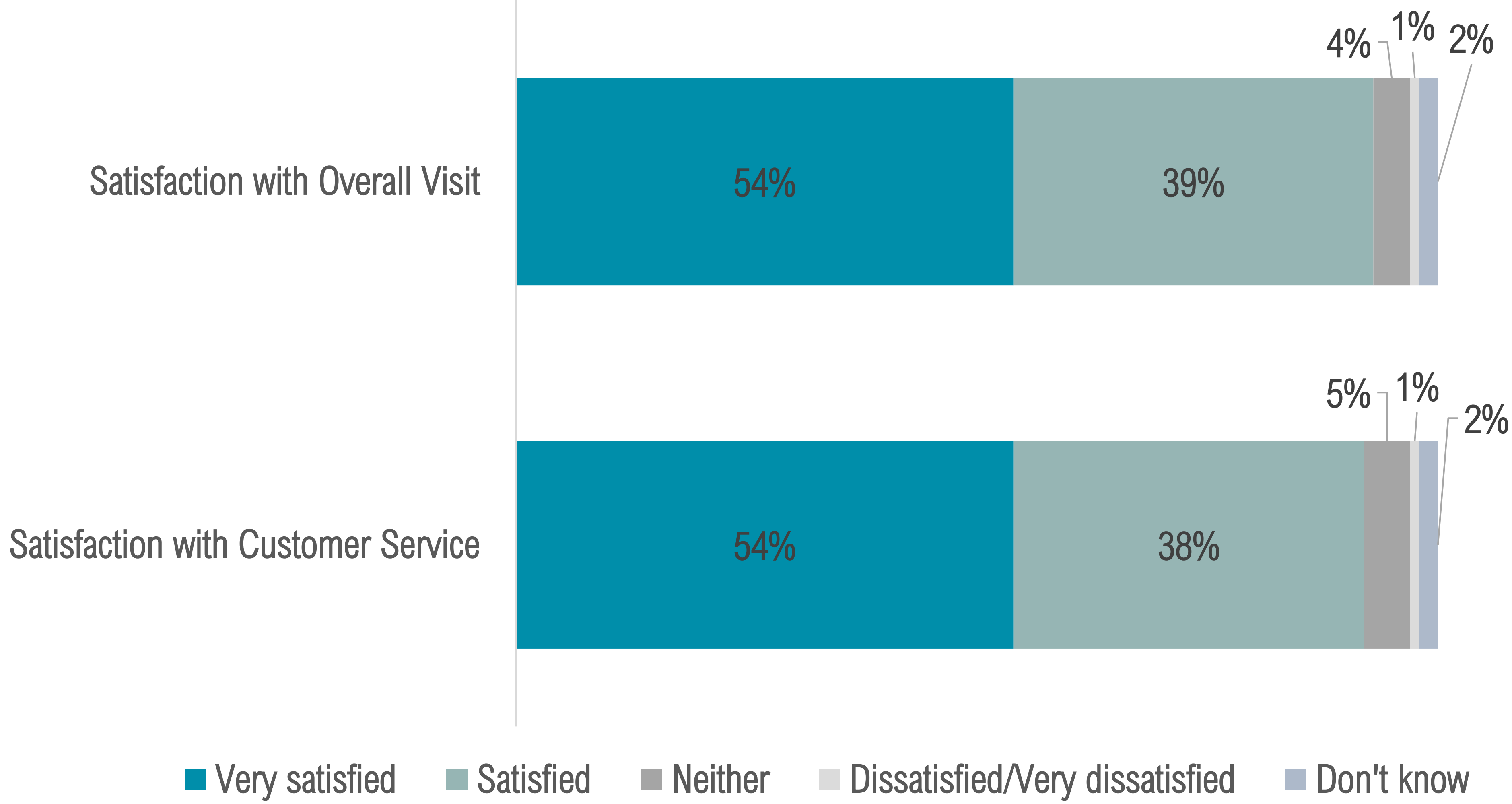
[1]Survey response options were expanded from Yes/No/DK to a 5-point Likert scale to provide more detailed information.

CROSSTABULATIONS: LIKELIHOOD OF RETURNING NEXT YEAR[1]

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2022	2023	2022	2023	2022	2023	2022	2023
Very Likely	35%	32%	69%	51%	58%	45%	64%	58%
Likely		27%		28%		29%		21%
Unsure/don't know	30%	33%	11%	19%	19%	23%	13%	18%
Unlikely	35%	6%	20%	1%	23%	2%	23%	3%
Very Unlikely		2%		1%		1%		0%

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

SATISFACTION



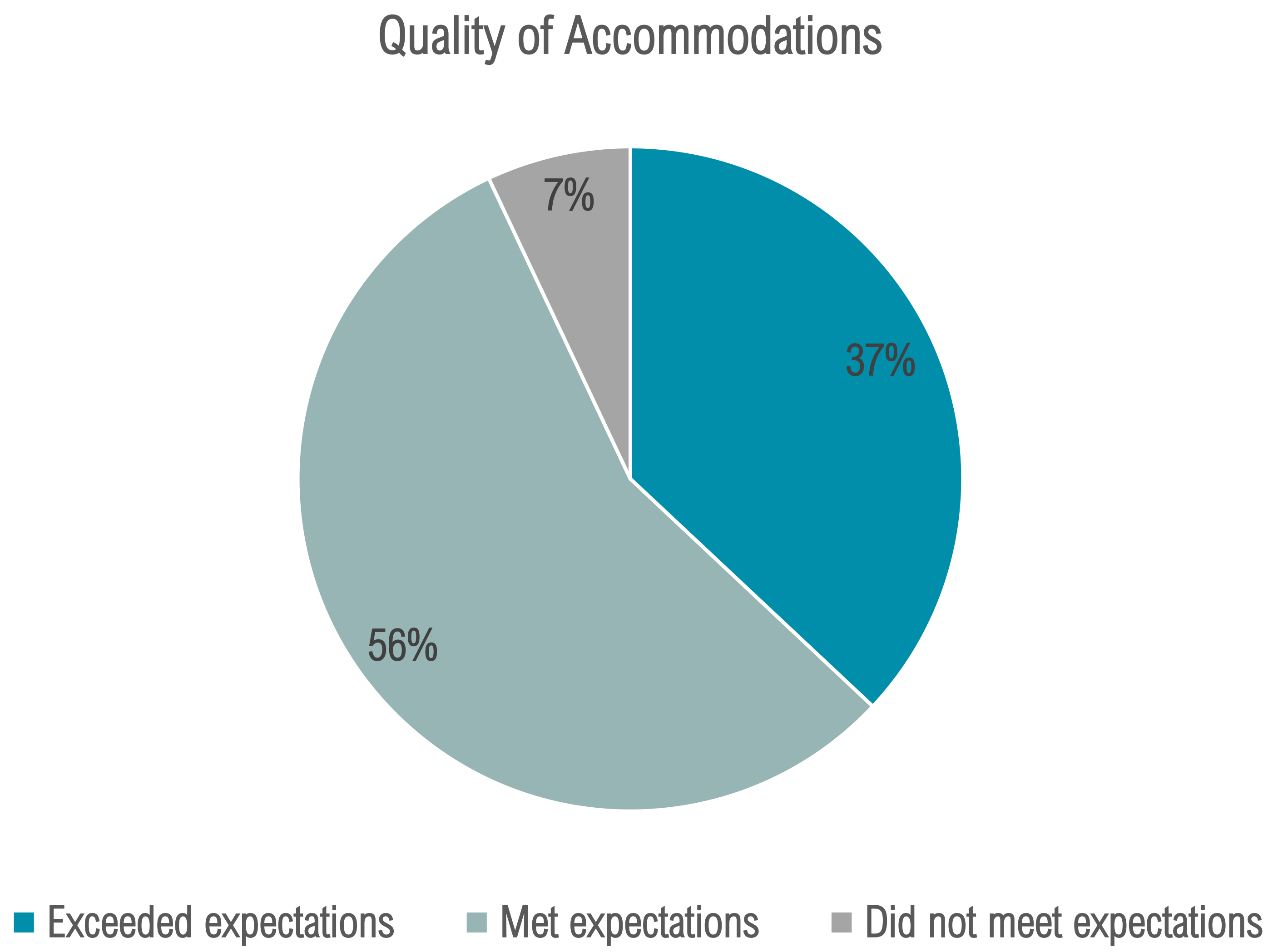
CROSSTABULATIONS: SATISFACTION WITH OVERALL VISIT

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2022	2023	2022	2023	2022	2023	2022	2023
Very Satisfied	35%	48%	58%	57%	49%	53%	50%	64%
Satisfied	57%	40%	38%	38%	46%	40%	47%	30%
Unsure/don't know	5%	7%	4%	5%	4%	6%	2%	5%
Dissatisfied	2%	4%	0%	0%	1%	1%	0%	1%
Very Dissatisfied	1%	1%	0%	0%	0%	0%	1%	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	37%	51%	57%	56%	49%	56%	46%	59%
Satisfied	52%	35%	37%	38%	42%	36%	48%	32%
Unsure/don't know	7%	9%	5%	5%	6%	6%	5%	8%
Dissatisfied	3%	4%	1%	1%	2%	2%	1%	1%
Very Dissatisfied	1%	1%	0%	0%	1%	0%	0%	0%

SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

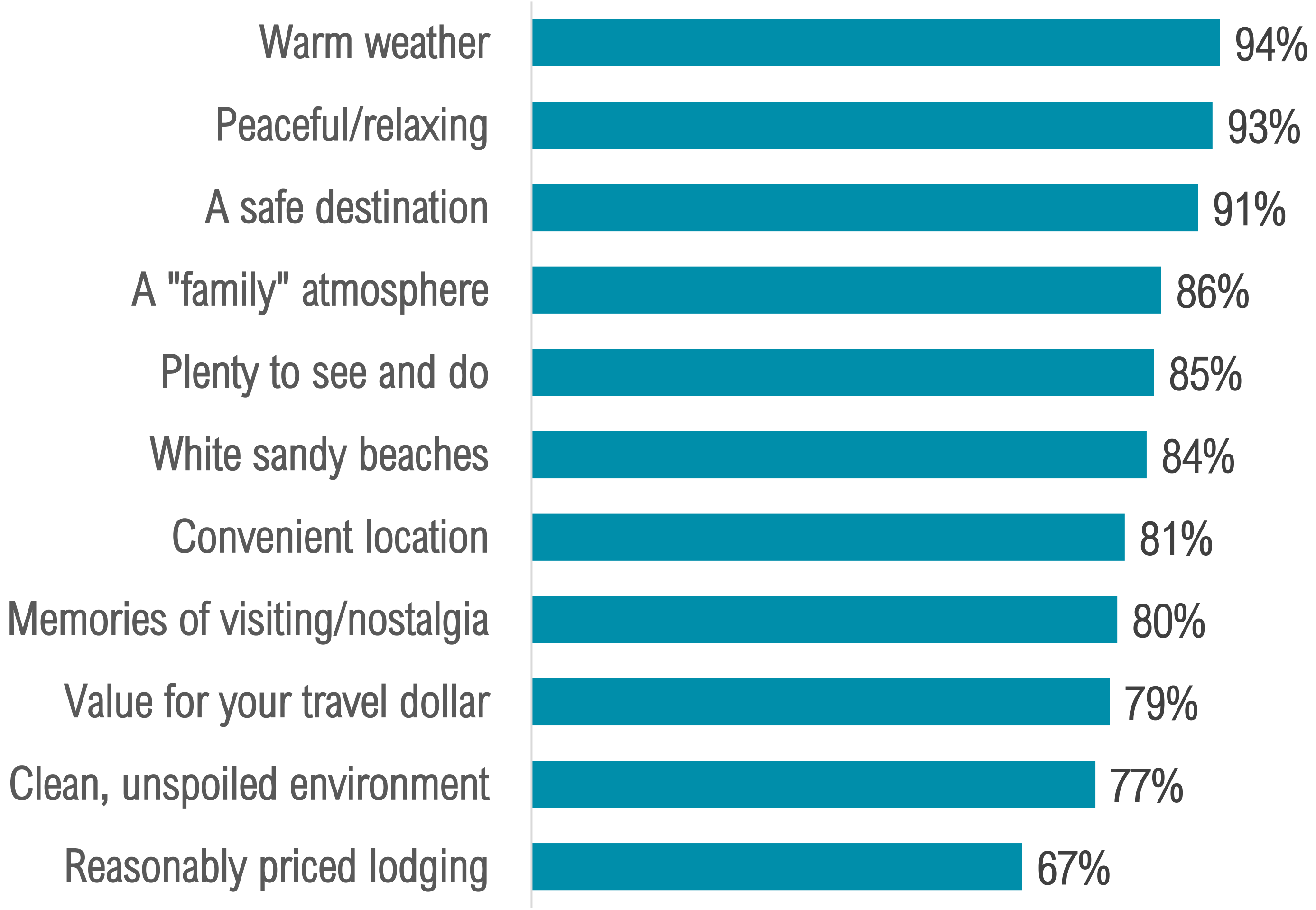


SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

	1st Time Visitors		Repeat Visitors		U.S. Residents		International Residents	
	2022	2023	2022	2023	2022	2023	2022	2023
Exceeded Expectations	38%	37%	38%	39%	36%	40%	49%	38%
Met Expectations	57%	51%	58%	57%	60%	51%	48%	53%
Did Not Meet Expectations	5%	12%	4%	4%	4%	9%	3%	9%

ATTRIBUTE RATINGS[1]

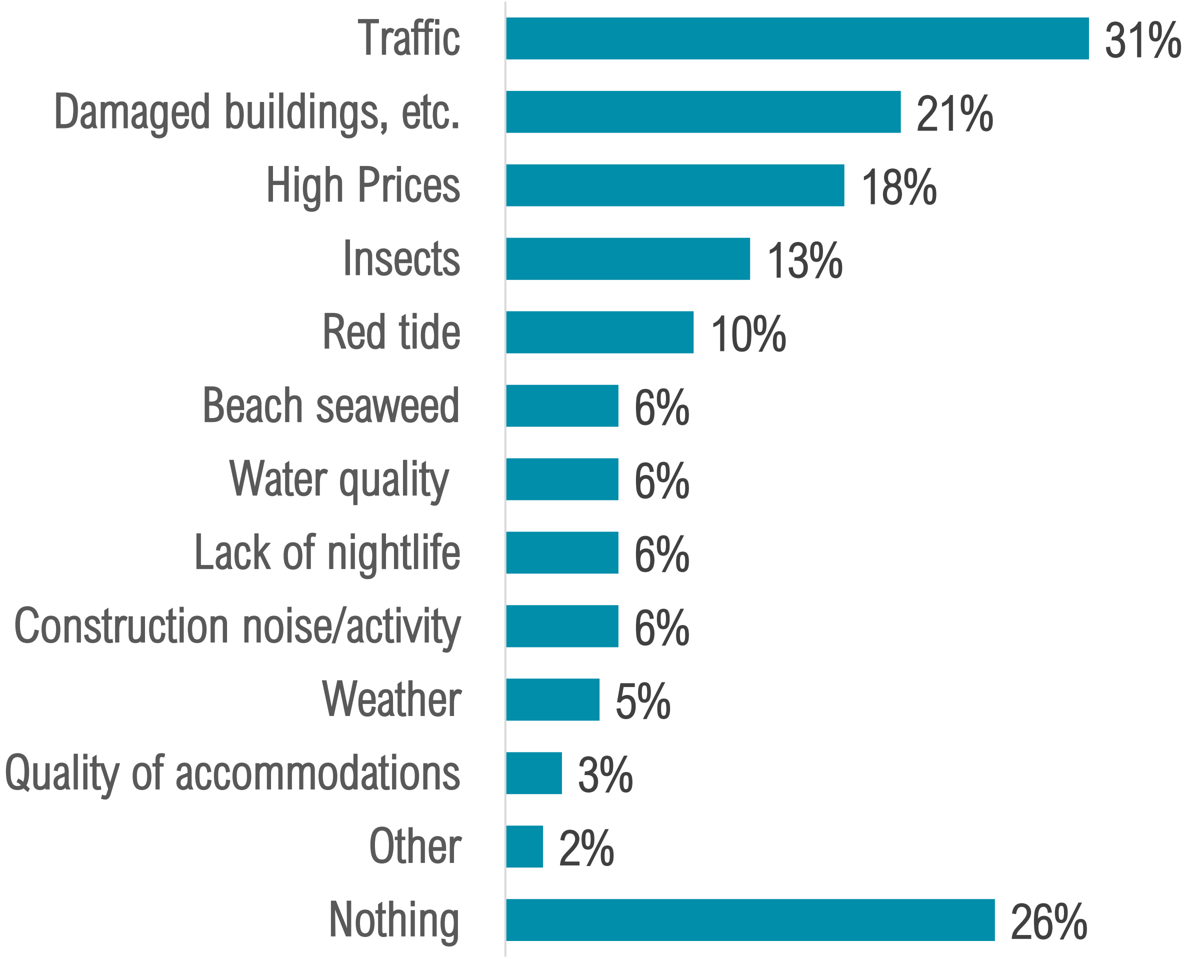
90% or more of visitors gave high experience ratings for warm weather, peacefulness, and safety in the Fort Myers area.



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

VISITOR CONCERNS[1]

Nearly 1 in 3 visitors were concerned about **traffic**, and over **1 in 5** were concerned about **damaged buildings**.



[1]Multiple responses permitted.

AREA DESCRIPTIONS

Warm Weather

- “Always a favorite destination for us with its’ beautiful warm days, chilly nights, as well as golf courses which surprisingly weren’t damaged much by the hurricane.”
- “We had a wonderful time at a wedding and visiting friends and family. It’s the perfect time of year with awesome weather.”
- “We’re having a really great time. The weather has been perfect, the beaches are gorgeous, and there’s some great kayaking.”

Peaceful & Relaxing

- “I’m working busy days volunteering to help with recovery and then in the evenings I get to relax, unwind, and enjoy great food at local restaurants.”
- “The beaches are peaceful and warm, the people are inviting, it’s a great family-friendly getaway.”
- “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.”

AREA DESCRIPTIONS

A Safe Destination

- “We’ve had a wonderful time on vacation here. Downtown is very nice and safe with a lot to do as well.”
- “I love the remoteness of some of the beautiful beach islands that you can only access via boat.”
- “Family friendly, clean, and safe. Always a fabulous time staying here at our condo.”
- “The best place to vacation with great weather, a tropical environment, and it’s family-oriented.”

“Family” Atmosphere

- “Still the best place to vacation in a tropical environment, but with a great family atmosphere.”
- “Very family friendly area with some really nice parks.”
- “Wonderful time of year to take the family down for some spring training games. Perfect weather too.”
- “The beaches are peaceful and warm, the people are inviting, it’s a great family-friendly getaway.”

Year-Over-Year Comparisons

ECONOMIC IMPACT

Visitor & Lodging Statistics	2022	2023	% Change
Visitors	4,203,900	2,976,200	-29.2%
Visitor Days	26,246,300	19,389,900	-26.1%
Room Nights	6,058,500	4,225,000	-30.3%
Direct Expenditures	$3,951,070,900	$2,894,033,400	-26.8%
Total Economic Impact	$6,294,055,900	$4,633,347,500	-26.4%
Occupancy	68.1%	57.5%	-15.5%
ADR	$197.52	$158.69	-19.7%
RevPAR	$134.51	$91.29	-32.1%
TDT Collections	$60,882,800	$37,198,900	- 38.9%

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM

	2022	2023	% Change
Direct Jobs	50,500	35,900	-28.9%
Total Jobs[1]	69,400	48,200	-30.5%
Direct Wages	$1,219,340,100	$956,829,700	-21.5%
Total Wages[1]	$1,978,615,400	$1,493,744,900	-24.5%
Direct Local Taxes	$118,475,500	$76,204,400	-35.7%
Total Local Taxes[1]	$201,100,300	$115,098,500	-42.8%
Direct State Taxes	$268,742,900	$153,655,400	-42.8%
Total State Taxes[1]	$389,694,200	$215,086,000	-44.8%

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

VISITOR TYPE

Visitor Type	2022	2023
Visitors in Paid Accommodations	72%	67%
Visitors in Non-Paid Accommodations	26%	31%
Day Trippers	2%	2%

PRE-VISIT

Planned trip in advance	2022	2023
1 week or less	5%	7%
2-4 weeks	14%	13%
1-2 months	33%	34%
3-6 months	29%	30%
6 months or more	18%	15%
Not sure	1%	1%

Considered Other Destinations	2022	2023
Yes	37%	39%
No	63%	61%

PRE-VISIT

Trip Planning Websites[1]	2022	2023
Airline websites/apps	27%	30%
Online search engines	33%	28%
Airbnb, VRBO, HomeAway etc.	24%	19%
Hotel websites/apps	16%	14%
Booking websites	19%	14%
Trip Advisor	14%	13%
Vacation rental websites/apps	19%	13%
Traveler reviews, blogs, stories	18%	12%
Visit Florida	11%	8%
Facebook	9%	8%
www.VisitFortMyers.com	9%	7%
VCB Facebook Page	10%	7%
Instagram	5%	4%
Video/Music Streaming Services	4%	4%
Other	4%	23%
None	16%	3%

[1]Multiple responses permitted.

PRE-VISIT

Information Requests[1]	2022	2023
Calling a hotel, motel, condo	31%	25%
Requesting and receiving a visitor guide	12%	7%
Calling the VCB	6%	5%
Receiving the VCB e-newsletter	4%	2%
Calling a local Chamber of Commerce	3%	2%
Other	3%	2%
None	55%	67%

[1]Multiple responses permitted.

PRE-VISIT

Reason for Visiting	2022	2023
Relax & unwind	36%	38%
Beach	44%	28%
Visiting friends & relatives	20%	28%
Checking-in on my property post-hurricane	1%	11%
Part-time resident ("Snowbird")	1%	9%
Shopping	5%	8%
Special occasion	5%	7%
Sporting event	4%	7%
Golf or tennis	4%	7%
Fishing	6%	6%
Special event	3%	5%
Business meetings/conferences	3%	5%
Nature, environment, bird watching	6%	5%
Water sports	5%	5%
Work-related hurricane recovery	1%	5%
Attractions	3%	4%
Volunteering	2%	4%
Photography	3%	3%
Biking, hiking	3%	2%
Culture	2%	1%
Museums, history	2%	1%
Diving, snorkeling	1%	1%
Guided tours	1%	1%
Other	4%	5%

PRE-VISIT

Recall of Lee County Promotions	2022	2023
Yes	47%	43%

Influenced by Promotions	2022	2023
Yes	26%	21%

Source of Advertising Recall	2022	2023
Internet	50%	49%
Social media	34%	36%
Traveler reviews, blogs	26%	21%
Television	14%	14%
www.VisitFortMyers.com	9%	8%
Video streaming services	-	8%
Travel/visitor guide	11%	7%
Email	-	7%
Newspaper	6%	7%
Magazine	8%	7%
AAA	5%	5%
Brochure	6%	3%
Radio	4%	3%
Billboard	3%	3%
Deal-based promotion	4%	2%
Music streaming services	-	1%
Podcast	-	1%
Other	4%	3%

PRE-VISIT

Characteristics influencing decision to visit Lee County (top 2 boxes)	2022	2023
Warm weather	91%	87%
Peaceful/relaxing	91%	87%
A safe destination	88%	83%
Plenty to see and do	80%	78%
White sandy beaches	84%	77%
Convenient location	77%	72%
A "family" atmosphere	77%	74%
Clean, unspoiled environment	79%	76%
Value for your travel dollar	74%	71%
Reasonably priced lodging	71%	63%

PRE-VISIT

Transportation	2022	2023
Fly	70%	69%
Drive a personal vehicle	25%	23%
Drive a rental vehicle	3%	6%
Drive a RV	1%	1%
Travel by bus	<1%	<1%
Other	1%	1%

Airport Used	2022	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 Regions	2022	2023
Florida	6%	6%
Southeast	19%	20%
Northeast	19%	20%
Midwest	38%	34%
West	8%	8%
Canada	5%	7%
United Kingdom	1%	1%
Germany	2%	2%
Other Europe	1%	1%
Other international	1%	1%

Visitor Origin Markets	2022	2023
New York	4%	6%
Chicago	4%	4%
Atlanta	3%	4%
Minneapolis - St Paul	3%	3%
Detroit	2%	3%
Cleveland - Akron	3%	3%
Boston	3%	3%
Washington, DC - Hagerstown	2%	3%

[1]Sources: Data from Visitor Tracking Survey

fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

downs & st. germain RESEARCH

TRAVEL PARTY PROFILE

Travel Parties	2022	2023
Mean travel party size	3.1[1]	2.9[1]
Travel with children under age 18	40%	35%

Travel Party Composition	2022	2023
As a family	47%	41%
As a couple	32%	32%
By yourself	9%	12%
With other couples/friends	9%	9%
With business associates	2%	4%
In a tour group	1%	1%
Other	<1%	1%

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

TRAVEL PARTY PROFILE

Marital Status	2022	2023
Married	71%	74%
Unmarried	29%	26%

Age	2022	2023
Average age	50	50

Household Income	2022	2023
Median Income	$109,600	$108,000

ACCOMMODATIONS

Lodging Accommodations	2022	2023
Hotel/motel/resort	35%	35%
Vacation rental home	35%	27%
Personal condo or 2nd home	15%	16%
Friends/family home	11%	15%
Bed & Breakfast/Inn	1%	2%
Campground/RV Park	1%	2%
Other	<1%	1%
Not spending the night	2%	2%

TRIP EXPERIENCE

Length of Stay[1]	2022	2023
Average nights in the Fort Myers area	6.2	6.5

First time/Repeat Visitors	2022	2023
First-time	36%	29%
Repeat	64%	71%

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

TRIP EXPERIENCE

Activities[1]	2022	2023
Restaurants	56%	62%
Relax and unwind	67%	61%
Beach	65%	49%
Visit friends/relatives	34%	41%
Shopping	41%	40%
Fishing	23%	22%
Nature, environment, bird watching	26%	21%
Water sports	27%	17%
Bars, nightclubs	16%	15%
Golf, tennis, or pickleball	11%	14%
Biking, hiking	25%	13%
Attractions	11%	11%
Photography	12%	10%
Attend or participate in a sporting event	4%	9%
Special events	6%	7%
Special occasion	5%	7%
Culture	7%	6%
Diving, snorkeling	7%	6%
Museums, history	8%	6%
Volunteering	3%	6%
Business meetings/conferences	2%	5%
Guided tours	6%	5%
Spas	5%	5%
Other	2%	3%

[1] Multiple responses permitted.

TRIP EXPERIENCE

Attractions[1]	2022	2023
Beaches	66%	51%
Bell Tower Shops	15%	22%
Edison & Ford Winter Estates	19%	19%
Gulf Coast Town Center	14%	18%
Miromar Outlets Mall	15%	17%
Coconut Point Mall	14%	16%
Fort Myers Beach Pier[2]	36%	15%
Sanibel Lighthouse	26%	15%
Shell Factory and Nature Park	15%	13%
J.N. Ding Darling National Wildlife Refuge	13%	7%
Bailey-Matthews Shell Museum	7%	6%
Manatee Park	5%	5%
Sanibel Outlets[3]	18%	0%
Periwinkle Place[3]	12%	0%
Barbara B. Mann Performing Arts Hall	2%	2%
Broadway Palm Dinner Theater	3%	2%
Other	6%	4%
None	7%	14%

[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	2022	2023
Fort Myers	20%	38%
Cape Coral	13%	18%
Fort Myers Beach	25%	10%
Bonita Springs	6%	9%
Estero	4%	7%
Sanibel Island	21%	4%
Captiva Island	3%	3%
North Fort Myers	2%	3%
Along I-75	1%	2%
Lehigh Acres	1%	2%
Boca Grande/Outer Islands	<1%	1%
Pine Island	1%	1%
None/not staying overnight	3%	2%

POST-TRIP EVALUATION

Likelihood of Recommending the Area	2022	2023
Very Likely	92%	47%
Likely		43%
Unsure/don't know	5%	8%
Unlikely	3%	2%
Very Unlikely		0%

Satisfaction with Accommodations	2022	2023
Exceeded expectations	36%	37%
Met expectations	59%	56%
Did not meet expectations	5%	7%

POST-TRIP EVALUATION

<table>
<tr><th>Likelihood of Returning to the Area</th><th>2022</th><th>2023</th></tr>
<tr><td>Very Likely</td><td rowspan="2">86%</td><td>52%</td></tr>
<tr><td>Likely</td><td>34%</td></tr>
<tr><td>Unsure/don’t know</td><td>10%</td><td>12%</td></tr>
<tr><td>Unlikely</td><td rowspan="2">4%</td><td>2%</td></tr>
<tr><td>Very Unlikely</td><td>0%</td></tr>
</table>

<table>
<tr><th>Likelihood of Returning to the Area Next Year</th><th>2022</th><th>2023</th></tr>
<tr><td>Very Likely</td><td rowspan="2">60%</td><td>46%</td></tr>
<tr><td>Likely</td><td>29%</td></tr>
<tr><td>Unsure/don’t know</td><td>29%</td><td>22%</td></tr>
<tr><td>Unlikely</td><td rowspan="2">11%</td><td>2%</td></tr>
<tr><td>Very Unlikely</td><td>1%</td></tr>
</table>

POST-TRIP EVALUATION

Satisfaction with Visit	2022	2023
Very satisfied	56%	54%
Satisfied	39%	39%
Neither	3%	4%
Dissatisfied/Very dissatisfied	1%	1%
Don't know	1%	2%

Satisfaction with Customer Service	2022	2023
Very satisfied	54%	54%
Satisfied	38%	38%
Neither	6%	5%
Dissatisfied/Very dissatisfied	1%	1%
Don't know	1%	2%

POST-TRIP EVALUATION

Visitor Concerns[1]	2022	2023
Traffic	34%	31%
Damaged buildings, signs, and landscapes	2%	21%
High Prices	21%	18%
Insects	15%	13%
Red tide	9%	10%
Water quality	9%	6%
Construction noise/activity	-	6%
Lack of nightlife	9%	6%
Beach seaweed	14%	6%
Weather	9%	5%
Quality of accommodations	5%	3%
Other	4%	2%
Nothing	24%	26%

[1]Multiple responses permitted.

Quarterly Comparisons

ECONOMIC IMPACT

Visitor & Lodging Statistics	January – March	April – June	July – September	October – December
Visitors	736,300	727,200	706,700	806,000
Visitor Days	6,111,300	4,450,500	4,113,000	4,715,100
Room Nights	1,378,600	1,054,900	865,200	1,016,400
Direct Expenditures	$967,837,700	$683,376,000	$584,185,900	$658,633,800
Total Economic Impact	$1,549,508,200	$1,094,085,000	$935,281,600	$1,054,472,700
Occupancy	70.9%	52.6%	50.6%	55.2%
ADR	$193.35	$137.11	$134.26	$154.89
RevPAR	$137.09	$72.12	$67.94	$85.50

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM

	January – March	April – June	July – September	October – December
Direct Jobs	12,400	8,700	7,300	7,500
Total Jobs[1]	17,200	11,400	9,600	10,000
Direct Wages	$253,957,700	$247,541,300	$210,786,800	$244,543,900
Total Wages[1]	$499,286,000	$349,202,400	$296,858,700	$348,397,800
Direct Local Taxes	$29,035,100	$17,893,100	$15,263,800	$14,012,400
Total Local Taxes[1]	$51,908,500	$23,509,700	$20,008,600	$19,671,700
Direct State Taxes	$68,716,500	$32,551,800	$27,761,900	$24,625,200
Total State Taxes[1]	$100,718,000	$43,028,300	$36,607,400	$34,732,300

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

VISITOR TYPE

Visitor Type	January – March	April – June	July – September	October –December
Visitors in Paid Accommodations	64%	68%	67%	69%
Visitors in Non-Paid Accommodations	35%	30%	31%	29%
Day Trippers	1%	2%	2%	2%

PRE-VISIT

Planned trip in advance	January – March	April – June	July –September	October – December
1 week or less	9%	6%	7%	5%
2-4 weeks	15%	14%	9%	13%
1-2 months	34%	32%	38%	33%
3-6 months	24%	31%	33%	32%
6 months or more	16%	17%	13%	15%
Not sure	2%	<1%	<1%	2%

Considered Other Destinations	January – March	April – June	July – September	October – December
Yes	42%	29%	43%	27%
No	58%	71%	57%	73%

PRE-VISIT

Trip Planning Websites[1]	January – March	April – June	July – September	October – December
Airline websites/apps	27%	30%	30%	32%
Online search engines	29%	29%	31%	25%
Airbnb, VRBO, HomeAway etc.	18%	22%	21%	17%
Hotel websites/apps	12%	14%	12%	17%
Booking websites	7%	15%	16%	16%
Vacation rental websites/apps	11%	16%	14%	11%
Trip Advisor	12%	13%	12%	14%
Traveler reviews, blogs, stories	15%	11%	14%	7%
Visit Florida	7%	8%	8%	8%
Facebook	7%	7%	10%	7%
VCB Facebook Page	7%	9%	8%	6%
www.VisitFortMyers.com	6%	8%	6%	7%
Instagram	3%	4%	6%	3%
Video/Music Streaming Services	4%	4%	4%	3%
Other	4%	2%	3%	4%
None	28%	22%	18%	23%

[1]Multiple responses permitted.

PRE-VISIT

Information Requests[1]	Jan – Mar	Apr – Jun	Jul –Sep	Oct – Dec
Calling the VCB	2%	11%	5%	2%
Calling a hotel, motel, condo	25%	20%	33%	23%
Requesting and receiving a visitor guide	8%	3%	9%	9%
Receiving the VCB e-newsletter	2%	2%	2%	2%
Calling a local Chamber of Commerce	2%	1%	2%	2%
Other	3%	2%	2%	2%
None	69%	70%	57%	70%

[1]Multiple responses permitted.

PRE-VISIT

Characteristics influencing decision to visit Lee County (top 2 boxes)	January – March	April – June	July –September	October – December
Warm weather	88%	88%	86%	87%
Peaceful/relaxing	85%	85%	91%	86%
A safe destination	80%	82%	87%	83%
Plenty to see and do	78%	75%	82%	76%
White sandy beaches	72%	72%	86%	77%
Convenient location	73%	75%	79%	76%
A "family" atmosphere	72%	74%	80%	72%
Clean, unspoiled environment	69%	66%	81%	74%
Memorable/nostalgic	67%	71%	76%	74%
Value for your travel dollar	71%	67%	76%	72%
Reasonably priced lodging	60%	61%	71%	62%

PRE-VISIT

Recall of Lee County Promotions	January – March	April – June	July –September	October – December
Yes	50%	42%	43%	38%

Source of Recalled Promotions	January – March	April – June	July –September	October – December
Internet	43%	48%	56%	50%
Social media	40%	33%	39%	33%
Traveler reviews, blogs	24%	17%	27%	17%
Television	16%	16%	10%	13%
www.VisitFortMyers.com	6%	9%	7%	9%
Video streaming services (YouTube, Hulu, etc.)	10%	6%	7%	7%
Travel/visitor guide	8%	8%	7%	7%
Email	7%	9%	6%	6%
Newspaper	6%	10%	4%	7%
Magazine	3%	9%	5%	9%
AAA	3%	6%	4%	5%
Brochure	2%	6%	2%	4%
Radio	4%	4%	1%	3%
Billboard	3%	3%	2%	3%
Deal-based promotion	0%	2%	2%	3%
Music streaming services (Pandora, Spotify, etc.)	1%	0%	1%	1%
Podcast	0%	0%	1%	1%
Other	2%	2%	4%	4%

PRE-VISIT

Transportation	January – March	April – June	July – September	October – December
Fly	59%	67%	78%	69%
Drive a personal vehicle	28%	27%	16%	21%
Drive a rental vehicle	9%	5%	5%	6%
Drive a RV	1%	1%	1%	2%
Travel by bus	1%	0%	0%	0%
Other	2%	0%	0%	2%

Airport Used	January – March	April – June	July – September	October – December
Southwest Florida International	85%	85%	86%	84%
Miami International	1%	2%	2%	2%
Ft. Lauderdale International	2%	2%	3%	3%
Orlando International	1%	2%	1%	1%
Tampa International	2%	1%	2%	2%
Punta Gorda	8%	7%	6%	7%
Other	1%	1%	0%	1%

TRAVEL PARTY PROFILE

Visitor Origin Regions	January – March	April – June	July – September	October – December
Florida	6.6%	6.1%	5.2%	6.7%
Southeast	20.8%	18.5%	20.7%	20.2%
Northeast	19.4%	19.4%	19.8%	19.3%
Midwest	37.5%	34.1%	31.8%	32.1%
West	8.3%	7.7%	9.2%	8.5%
Canada	4.6%	8.5%	6.8%	6.4%
United Kingdom	0.5%	1.0%	1.0%	1.3%
Germany	0.6%	2.3%	3.0%	3.6%
Other Europe	0.5%	0.7%	1.2%	1.0%
Other International	1.2%	1.7%	1.3%	0.9%

TRAVEL PARTY PROFILE

Visitor Origin Markets	January – March	April – June	July – September	October – December
New York	4%	5%	9%	5%
Chicago	4%	4%	5%	4%
Atlanta	4%	4%	4%	4%
Minneapolis – St Paul	6%	3%	1%	3%
Detroit	4%	3%	2%	3%
Cleveland – Akron	2%	2%	5%	2%
Boston	4%	3%	1%	2%
Washington, DC – Hagerstown	2%	3%	3%	2%
Cincinnati	2%	2%	3%	2%
Philadelphia	2%	2%	1%	3%
Denver	1%	2%	2%	2%
Indianapolis	2%	1%	2%	2%
Milwaukee	2%	2%	<1%	2%
Naples & surrounding areas	3%	2%	1%	2%
Nashville	2%	1%	2%	1%

TRAVEL PARTY PROFILE

Travel Parties	January – March	April – June	July – September	October – December
Mean travel party size[1]	2.9	2.8	3.0	2.9
Travel with children under age 18	30%	35%	44%	32%

Travel Party Composition	January – March	April – June	July – September	October – December
As a family	35%	42%	54%	36%
As a couple	33%	34%	28%	34%
By yourself	15%	9%	8%	15%
With other couples/friends	10%	10%	7%	8%
With business associates	6%	3%	2%	5%
In a tour group	1%	1%	0%	0%
Other	0%	1%	1%	2%

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

TRAVEL PARTY PROFILE

Marital Status	January – March	April – June	July – September	October – December
Married	73%	74%	73%	75%
Unmarried	27%	26%	27%	25%

Age	January – March	April – June	July – September	October – December
Median age	50	51	47	50

Household Income	January – March	April – June	July – September	October – December
Median Income	$111,500	$107,600	$105,600	$103,300

TRIP EXPERIENCE

Length of Stay	January – March	April – June	July – September	October – December
Average nights stayed in the Fort Myers Area	8.3	6.1	5.8	5.9

First time/Repeat Visitors	January – March	April – June	July – September	October – December
First-time	25%	30%	33%	27%
Repeat	75%	70%	67%	73%

TRIP EXPERIENCE

Activities[1]	January – March	April – June	July – September	October – December
Restaurants	65%	65%	57%	60%
Relax and unwind	62%	58%	65%	61%
Beach	34%	54%	58%	50%
Visit friends/relatives	43%	43%	35%	43%
Shopping	38%	41%	41%	41%
Fishing	20%	21%	27%	21%
Nature, environment, bird watching	15%	23%	24%	23%
Water sports	8%	16%	27%	17%
Bars, nightclubs	15%	15%	14%	17%
Golf, tennis, or pickleball	17%	14%	11%	14%
Biking, hiking	10%	13%	13%	14%
Attractions	7%	14%	10%	12%
Photography	10%	7%	11%	10%
Attend or participate in a sporting event	19%	8%	3%	6%
Special occasion	7%	10%	4%	9%
Special events	9%	6%	6%	8%
Museums, history	5%	7%	5%	8%
Diving, snorkeling	4%	5%	8%	6%
Culture	5%	6%	4%	7%
Volunteering	10%	6%	1%	5%
Guided tours	4%	7%	5%	6%
Business meetings/conferences	4%	5%	2%	9%
Spas	3%	4%	6%	6%
Other	6%	1%	3%	2%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Attractions[1]	January – March	April – June	July – September	October – December
Beaches	34%	54%	53%	49%
Bell Tower Shops	27%	21%	23%	23%
Gulf Coast Town Center	22%	19%	21%	19%
Edison & Ford Winter Estates	21%	19%	16%	19%
Miromar Outlets Mall	21%	14%	14%	21%
Coconut Point Mall	18%	15%	18%	17%
Shell Factory and Nature Park	12%	12%	10%	14%
Sanibel Lighthouse	1%	12%	18%	15%
Fort Myers Beach Pier[2]	<1%	11%	14%	12%
Bailey-Matthews Shell Museum	6%	5%	9%	5%
J.N. Ding Darling National Wildlife Refuge	<1%	7%	7%	7%
Manatee Park	6%	4%	2%	6%
Broadway Palm Dinner Theater	2%	2%	2%	3%
Barbara B. Mann Performing Arts Hall	2%	2%	1%	2%
Sanibel Outlets[3]	0%	0%	0%	0%
Periwinkle Place[3]	0%	0%	0%	0%
Other	6%	2%	<1%	5%
None	18%	16%	13%	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.

TRIP EXPERIENCE

Area stayed	January – March	April – June	July – September	October – December
Fort Myers	46%	36%	34%	39%
Cape Coral	17%	24%	20%	14%
Fort Myers Beach	9%	6%	11%	12%
Bonita Springs	8%	9%	8%	10%
Estero	8%	5%	7%	8%
Sanibel Island	2%	4%	3%	6%
Captiva Island	1%	5%	6%	2%
North Fort Myers	3%	3%	3%	3%
Lehigh Acres	2%	2%	3%	1%
Along I-75	2%	2%	2%	1%
Boca Grande/Outer Islands	1%	1%	1%	1%
Pine Island	<1%	1%	<1%	1%
None/not staying overnight	1%	2%	2%	2%

POST-TRIP EVALUATION

Likelihood of Recommending	January – March	April – June	July – September	October – December
Very Likely	44%	49%	51%	44%
Likely	44%	41%	40%	46%
Unsure/don't know	10%	8%	6%	8%
Unlikely	2%	1%	2%	2%
Very Unlikely	0%	1%	1%	0%

Satisfaction with Accommodations	January – March	April – June	July – September	October – December
Exceeded expectations	31%	39%	41%	39%
Met expectations	59%	54%	51%	56%
Did not meet expectations	10%	7%	8%	5%

POST-TRIP EVALUATION

Likelihood of Returning	January – March	April – June	July – September	October – December
Very Likely	49%	54%	53%	51%
Likely	37%	33%	34%	34%
Unsure/don't know	12%	10%	11%	13%
Unlikely	1%	2%	2%	2%
Very Unlikely	1%	1%	0%	0%

Likelihood of Returning Next Year	January – March	April – June	July – September	October – December
Very Likely	44%	47%	45%	48%
Likely	33%	29%	32%	20%
Unsure/don't know	19%	20%	20%	29%
Unlikely	3%	3%	1%	2%
Very Unlikely	1%	1%	2%	1%

POST-TRIP EVALUATION

Satisfaction with Visit	January – March	April – June	July – September	October – December
Very satisfied	49%	56%	56%	56%
Satisfied	41%	38%	38%	38%
Neither	7%	4%	3%	4%
Dissatisfied/Very dissatisfied	1%	1%	2%	1%
Don't know	2%	1%	1%	1%

Satisfaction with Customer Service	January – March	April – June	July – September	October – December
Very satisfied	45%	55%	59%	56%
Satisfied	43%	38%	34%	36%
Neither	8%	4%	5%	5%
Dissatisfied/Very dissatisfied	1%	1%	1%	1%
Don't know	2%	2%	1%	2%

POST-TRIP EVALUATION

Visitor Concerns[1]	January – March	April – June	July – September	October – December
Traffic	39%	32%	23%	29%
Damaged buildings, signs, etc.	17%	28%	26%	14%
High Prices	20%	17%	16%	19%
Insects	8%	12%	18%	13%
Red tide	16%	14%	5%	5%
Water quality	7%	6%	5%	7%
Construction noise/activity	<1%	4%	10%	9%
Lack of nightlife	6%	4%	8%	5%
Beach seaweed	3%	8%	8%	4%
Weather	3%	2%	8%	7%
Quality of accommodations	3%	3%	3%	3%
Other	<1%	2%	4%	2%
Nothing	29%	27%	26%	24%

[1]Multiple responses permitted.

Methodology

METHODOLOGY

- Economic Impact of tourism in Lee County is derived from:
  - Visitor Tracking Study
    - In-person interviews in public areas, hotels, & at events around Lee County and online surveys
    - Sample size: 3,576 completed interviews
    - Target individuals: Visitors to Lee County
    - Data Collection: January 2023 – December 2023
  - Occupancy Study
    - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc., and the STR Report
  - IMPLAN Economic Impact Modeling software
    - IMPLAN models the way tourism dollars are spent and re-spent in other sectors of the economy, generating waves of economic activity, called multiplier effects. The model uses national industry data and county-level economic data to generate a series of multipliers, which in turn estimate the total economic implications of economic activity.
    - Over 1,500 organizations use IMPLAN, including FEMA, EPA, Federal Reserve Bank, and Bureau of Land Management.
  - Various government agencies and data sources including Florida Department of Business and Professional Regulation
  - TDT collections provided by the Lee County VCB
  - Tourism database at Downs & St. Germain Research

Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

Calendar Year 2023
Visitor Tracking, Occupancy & Economic Impact Study

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ISLANDS, BEACHES & NEIGHBORHOODS

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