Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

Jan - Mar 2024

Visitor Tracking, Occupancy & Economic Impact Study

Introduction

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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

Jan - Mar 2024

- **Visitation** was **up 24.2%** and **room nights** were **up 30.6%.**
  - The steep increase in visitation was due largely to an increase in occupancy as well as in units available, and a decreased length of stay compared to Jan-Mar 2023.
- The **proportion of visitors** who stayed in **paid accommodations** increased from **64%** in Jan-Mar 2023 to **67%** in Jan-Mar 2024.
- **Direct Spending** was **up 26.9%** and **Economic Impact of Tourism** was **up 26.3%**, when compared to Jan-Mar 2023, which was the second quarter after the impact of Hurricane Ian.
- The **proportion of international visitors** saw **an 18% increase** compared to the same period last year, **representing** a **46% increase** in the actual **number of international visitors** to the area.

74.0%	$224.56	$166.13
OCCUPANCY RATE	AVERAGE DAILY RATE	REVENUE PER ROOM
↑ 7.3% from 2023	↑ 2.9% from 2023	↑ 10.4% from 2023

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VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

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

TOURISM SNAPSHOT: KEY METRICS JAN-MAR 2023 VS. 2024

Visitor & Lodging Statistics	Jan - Mar 2023[3]	Jan - Mar 2024	% Change '23-'24
Visitors	666,900	828,300	+ 24.2%
Visitor Days	5,123,900	5,880,900	+ 14.8%
Room Nights	1,081,000	1,411,300	+ 30.6%
Direct Expenditures[1]	$825,397,800	$1,047,587,600	+ 26.9%
Total Economic Impact[2]	$1,321,461,900	$1,668,807,000	+ 26.3%

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

TOURISM SNAPSHOT: KEY METRICS JAN-MAR 2022 VS. 2024

Visitor & Lodging Statistics	Jan - Mar 2022	Jan - Mar 2024	% Change '22-'24
Visitors	1,126,500	828,300	- 26.5%
Visitor Days	8,561,400	5,880,900	- 31.3%
Room Nights	1,985,900	1,411,300	- 28.9%
Direct Expenditures[1]	$1,410,763,600	$1,047,587,600	- 25.7%
Total Economic Impact[2]	$2,247,346,400	$1,668,807,000	- 25.7%

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

TOURISM SNAPSHOT: KEY METRICS FISCAL YEAR-TO-DATE

Visitor & Lodging Statistics	FYTD 2023[3]	FYTD 2024[3]	% Change '23-'24
Visitors	1,153,200	1,634,300	+ 41.7%
Visitor Days	8,918,400	10,596,000	+ 18.8%
Room Nights	1,947,600	2,427,700	+ 24.7%
Direct Expenditures[1]	$1,347,089,500	$1,706,221,400	+ 26.7%
Total Economic Impact[2]	$2,152,516,800	$2,723,279,700	+ 26.5%

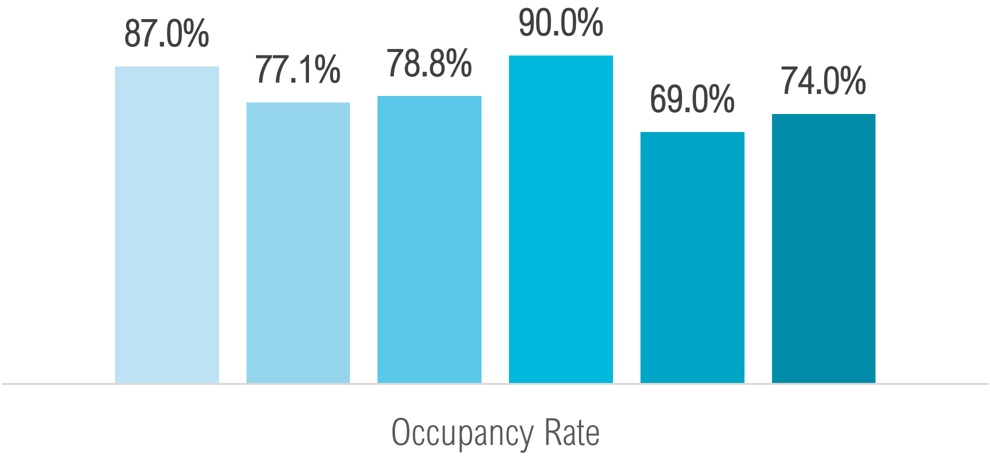
[1] Includes: accommodations, restaurants, entertainment, shopping, transportation, groceries, and "other" expenses.
[2] Economic impact includes indirect and induced effects of visitor spending. Indirect effects are increased business spending resulting from tourism dollars. Induced effects are increased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

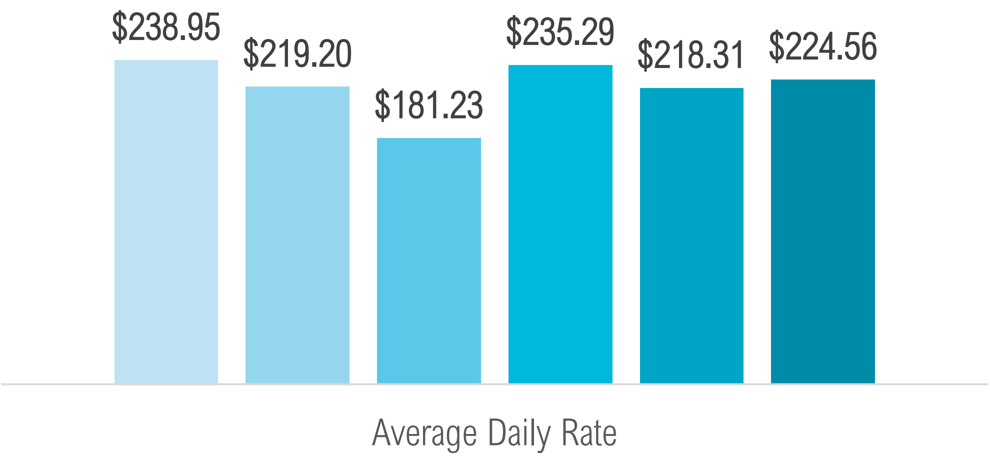
JAN-MAR LODGING STATISTICS[1]

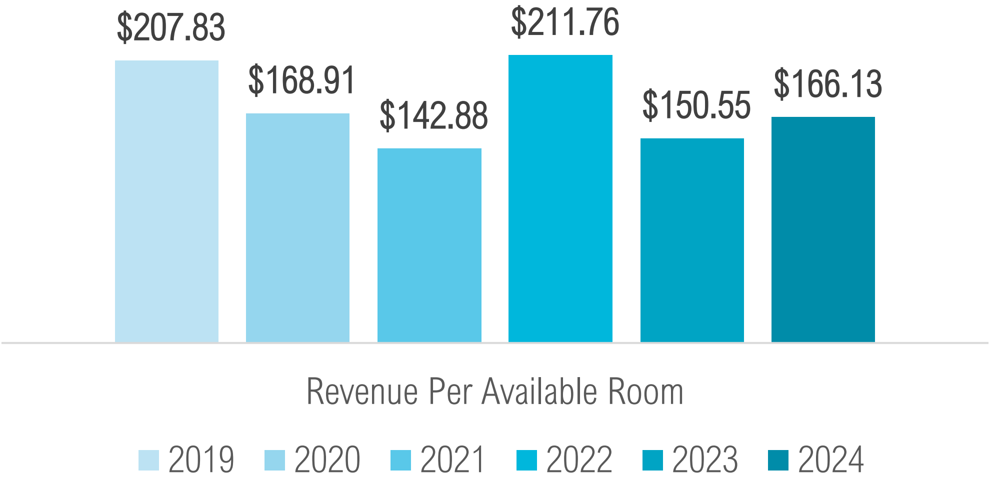
74.0%	$224.56	$166.13
Occupancy	ADR	RevPAR
7.3% From 2023	2.9% From 2023	10.4% From 2023

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

JAN-MAR 2019-2024 OVERALL LODGING METRICS[1,2]

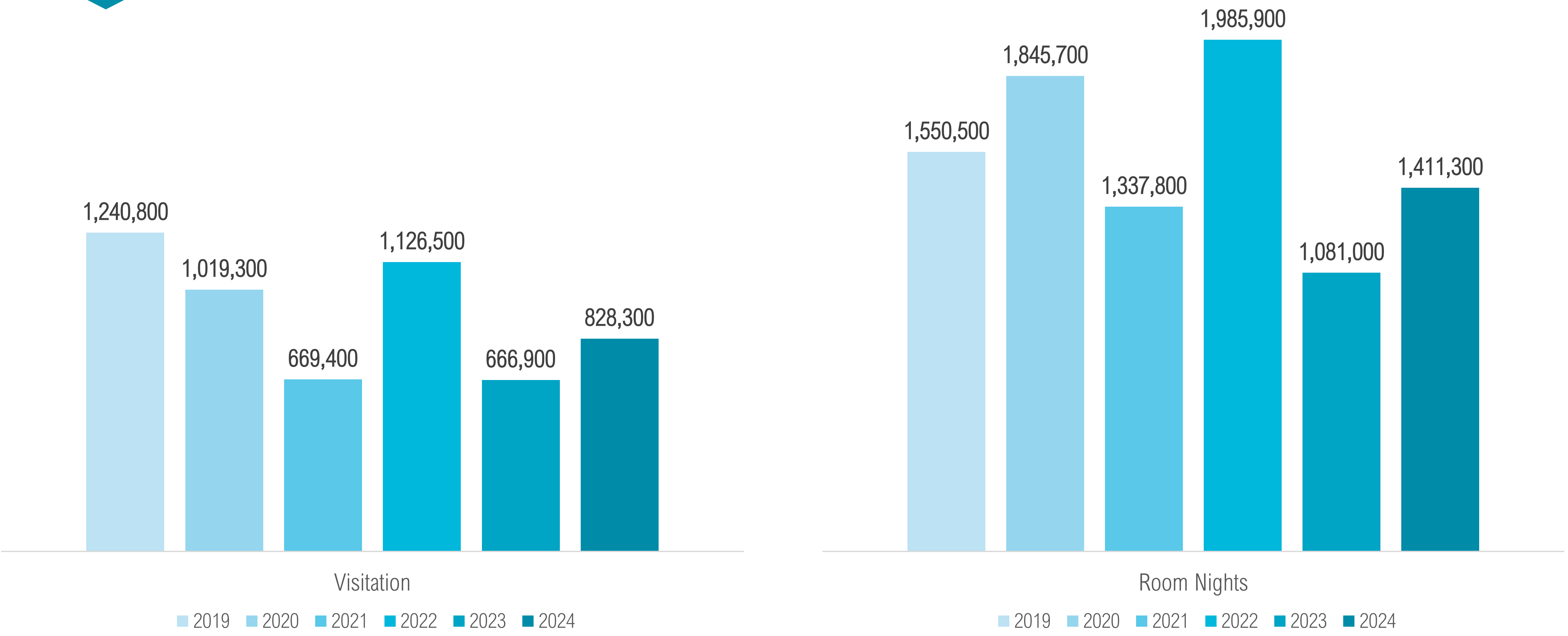






[1] Sources: STR, KeyData, & DSG Occupancy Study
[2] 2019-2023 data has been revised to reflect updated unit figures for RV Parks & Campgrounds as determined in a recent survey of Lee County RV Parks & Campgrounds conducted by DSG Research.

JAN-MAR 2019-2024 VISITATION & ROOM NIGHTS[1,2]



[1] Sources: STR, KeyData, & DSG Occupancy Study
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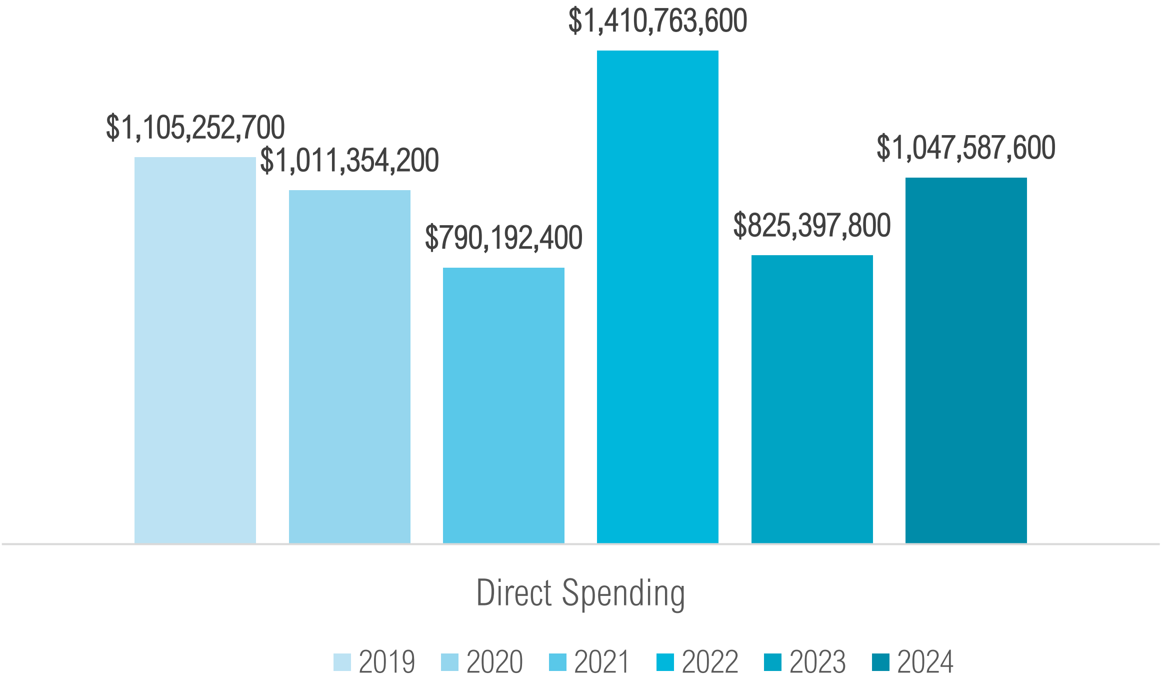
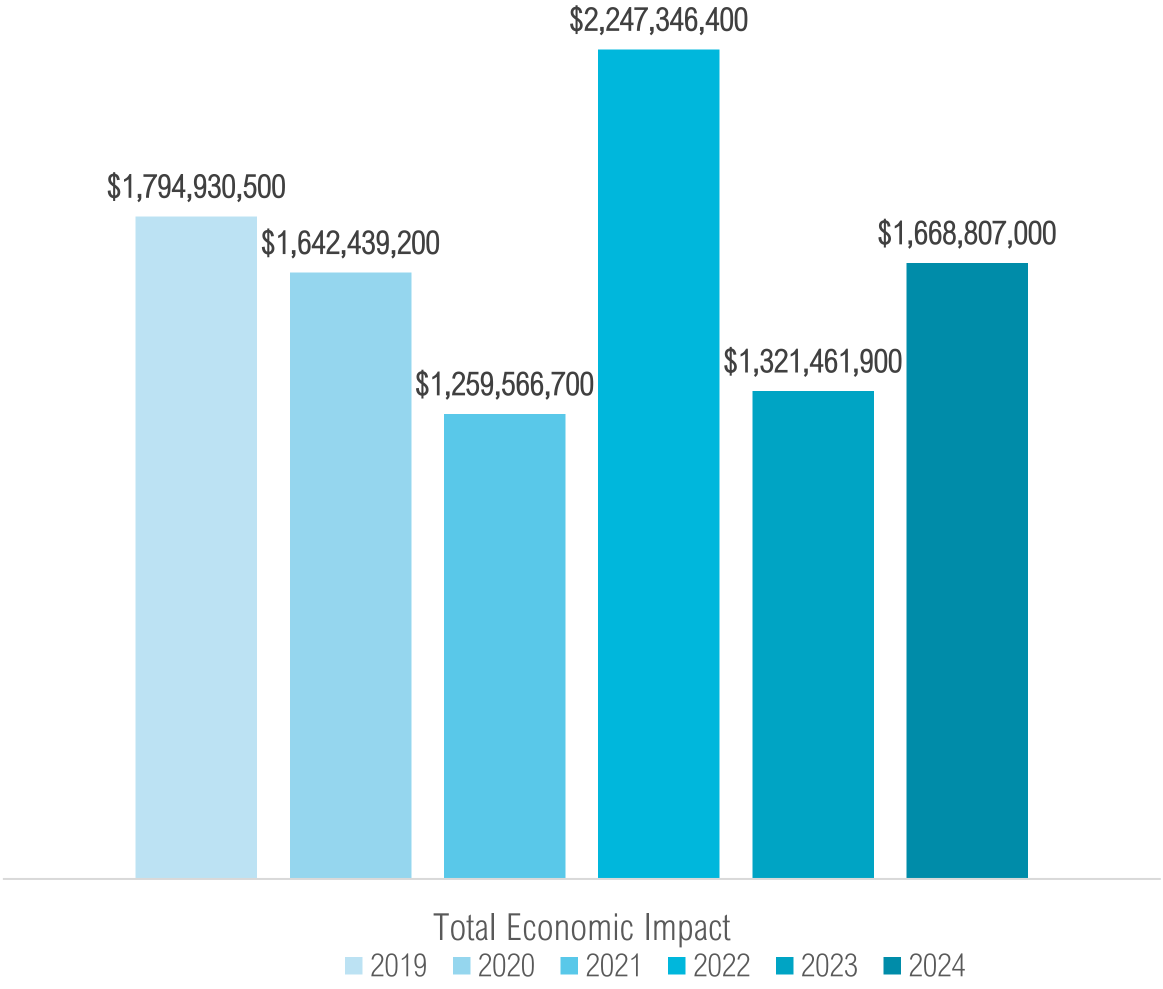
JAN-MAR 2019-2024 SPENDING & ECONOMIC IMPACT[1,2]





[1] Sources: STR, KeyData, & DSG Occupancy Study
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VISITOR JOURNEY: PRE-VISIT

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

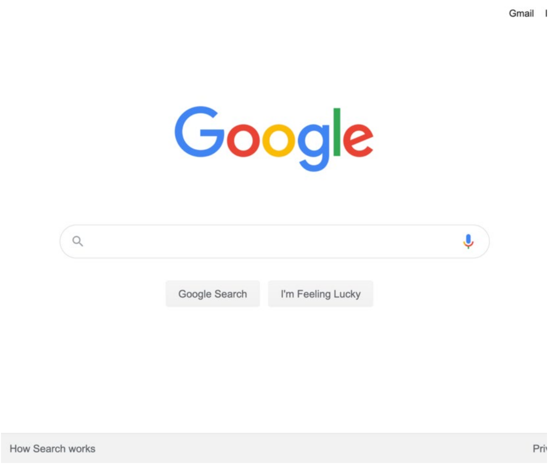
TRIP PLANNING

- Over half of visitors planned their trips to the Fort Myers area 3 months or more in advance
- The average trip planning cycle lasted roughly 3 months
- 1 in 4 visitors requested information to plan their trips
  - 1 in 5 visitors called a hotel, motel, or condo
  - 6% of visitors requested a visitor guide
- 36% of visitors considered choosing other destinations when planning their trips

TRIP PLANNING: WEBSITES/APPS USED

- 3 in 4 visitors used websites and apps to plan their trips to the Fort Myers area
- Top websites and apps used to plan their trips include[1]:

29% Airline Websites/Apps



25% Search Engines

22% Airbnb, Vrbo, etc.

15% Hotel websites/apps

[1]Multiple responses permitted.

TOP TRIP INFLUENCES

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

88% Warm weather

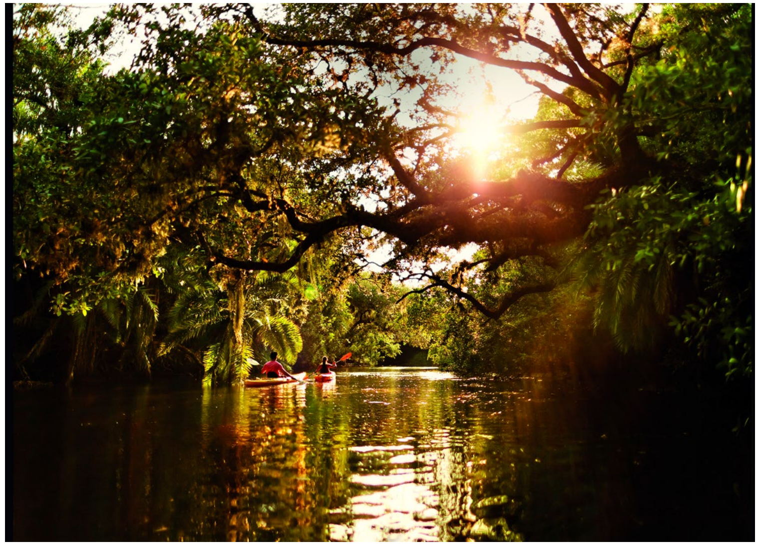
84% Peaceful/relaxing

78% 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]:



41% Relax & Unwind

33% Beach

29% Visiting Friends & Relatives

[1]Three responses permitted.

PROMOTION RECALL

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

44% Internet

32% Social media

17% Traveler reviews, blogs

15% Television

[1]Multiple responses permitted.

BOOKING

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

38% Directly with hotel/condo

21% Airbnb

14% Vrbo

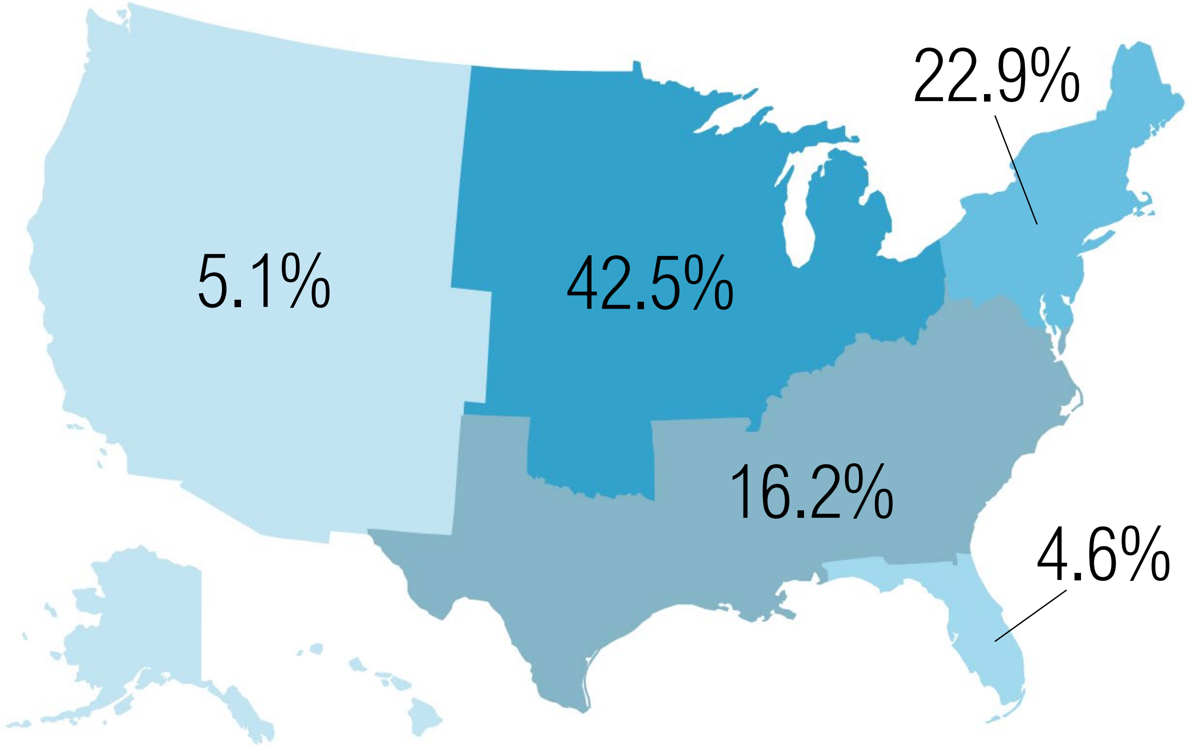
14% Online travel agency

TRANSPORTATION

- 66% of visitors flew to the Fort Myers area
- 56% of all visitors traveled to the Fort Myers area via RSW

VISITOR JOURNEY: TRAVEL PARTY PROFILE

ORIGIN REGION[1]



US = 91.3%

Canada – 5.5%

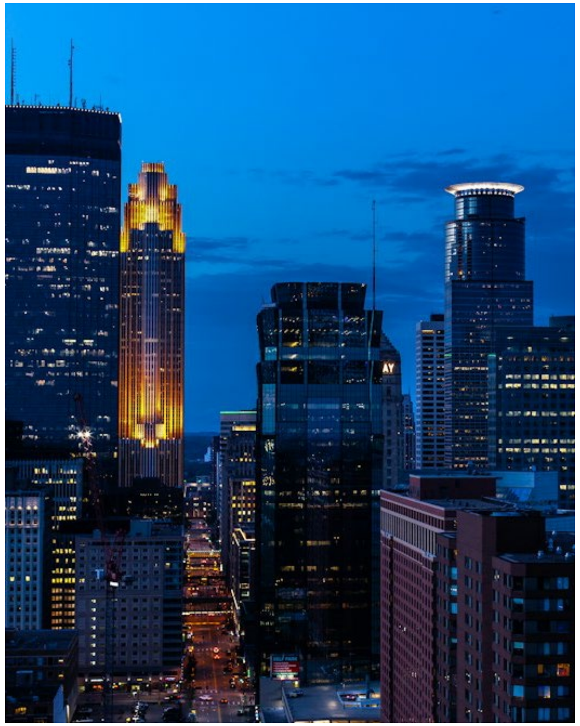
United Kingdom – 0.9%

2.3% Other International Markets

(Germany, 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]



8% Minneapolis – Saint Paul

4% New York

4% Boston

4% Detroit

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

TRAVEL PARTY SIZE AND COMPOSITION

- Visitors traveled in a party composed of 2.7 people[1]
- 27% traveled with children
- Over 2 in 5 visitors traveled as a couple, and 1 in 3 visitors traveled as a family

[1]Sources: Occupancy Study and Visitor Tracking Study

DEMOGRAPHIC PROFILE[1]

Jan – Mar Visitors:

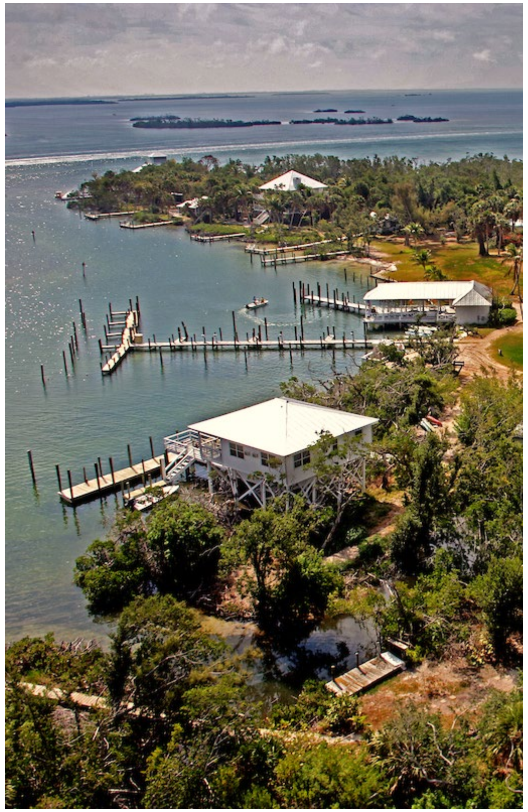
- Median age of 53 years old
- Median household income of $105,700
- Married (76%)
- College educated (65%)
- Caucasian/white (84%)

Visitor Journey: Trip Experience

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

TOP ACCOMMODATIONS

31% Hotel/Motel/Resort



31% Condo/Vacation Rental

16% Personal second home, etc.

16% Staying with friends/relatives

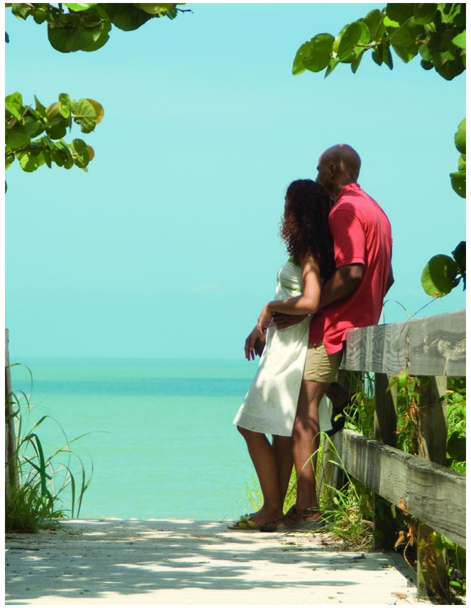
LENGTH OF STAY & NUMBER OF TIMES IN DESTINATION

- Visitors[1] spent an average of **7.1 nights** in the Fort Myers area
- **25%** were **first time** visitors
- **20%** have visited **more than 10 times**

[1]Sources: Occupancy Study and Visitor Tracking Study

VISITOR ACTIVITIES

- Top visitor activities include[1]:



65% Relaxing & unwinding

63% Dining out

54% Beach

45% Visit friends/relatives

38% Shopping

[1]Multiple responses permitted.

TOP ATTRACTIONS VISITED[1]

53% Beaches

24% Edison & Ford Estates

21% Bell Tower Shops

[1]Multiple responses permitted.

TOP COMMUNITIES STAYED

36% Fort Myers

21% Cape Coral

11% Fort Myers Beach

10% Bonita Springs

VISITOR JOURNEY: POST-TRIP EVALUATION

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

SATISFACTION

- 91% of visitors are likely to recommend the area
  - 60% are very likely to recommend
- 89% of visitors are likely to return
  - 64% are very likely to return
- 75% of visitors are likely to return next year
  - 54% 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 (59% were very satisfied)
- 92% of visitors were satisfied or very satisfied with customer service on their visit (58% were very satisfied)
- 94% of visitors said paid accommodations at least met their expectations (38% said they exceeded expectations)

TOP ATTRIBUTE RATINGS

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

93% Warm weather

90% Peaceful/relaxing

88% 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

- Half of visitors mentioned traffic as their least favorite part of their visit

- Nearly 1 in 5 visitors mentioned high prices, while 16% of visitors mentioned damaged buildings and landscapes.

- Nearly 1 in 4 visitors said there was nothing they disliked about the area during their visit.

AREA DESCRIPTIONS

Warm Weather

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

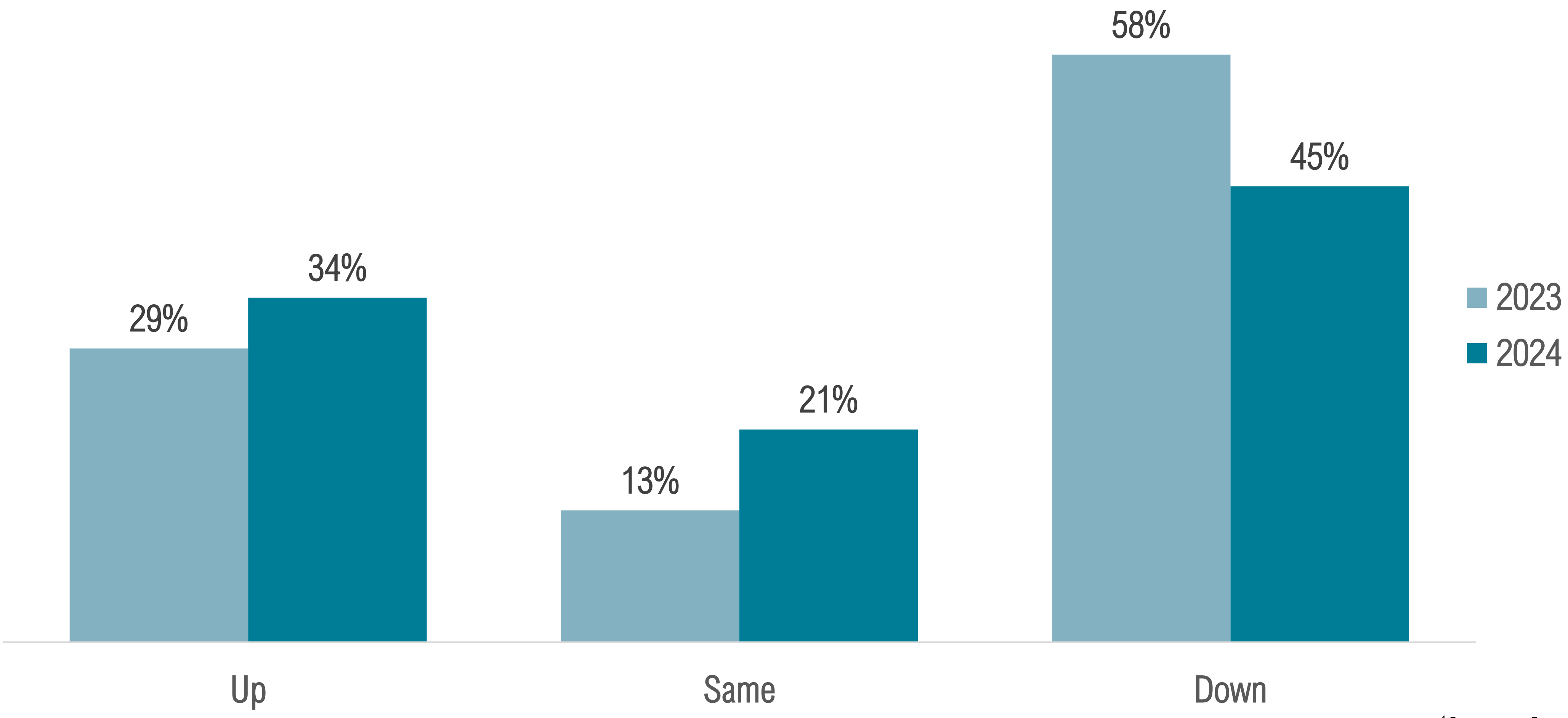
Peaceful/relaxing

"Tremendously good time in our favorite place…with a relaxing atmosphere and gorgeous crystal-clear waterways."

Safe Destination

"Very inviting, clean, friendly, and safe. Wonderful vacation spot."

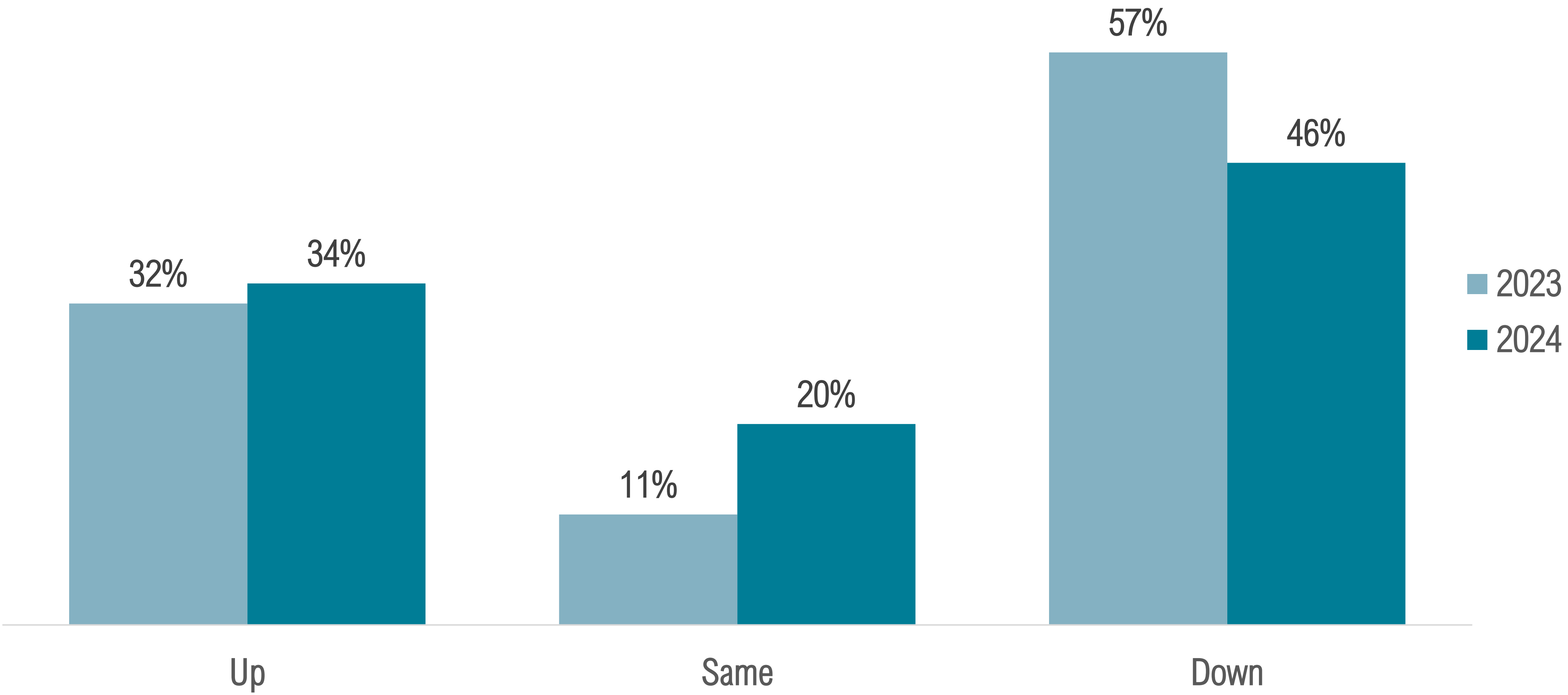
OCCUPANCY BAROMETER[1]: APR – JUN RESERVATIONS



[1]Sources: Occupancy Survey

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

OCCUPANCY BAROMETER[1]: JUL – SEP RESERVATIONS



[1]Sources: Occupancy Survey
Accommodations partners were asked the following, "Please think about your reservations for the next three months. Compared to July through September of 2023, would you say the total level of reservations are up, the same, or down?"

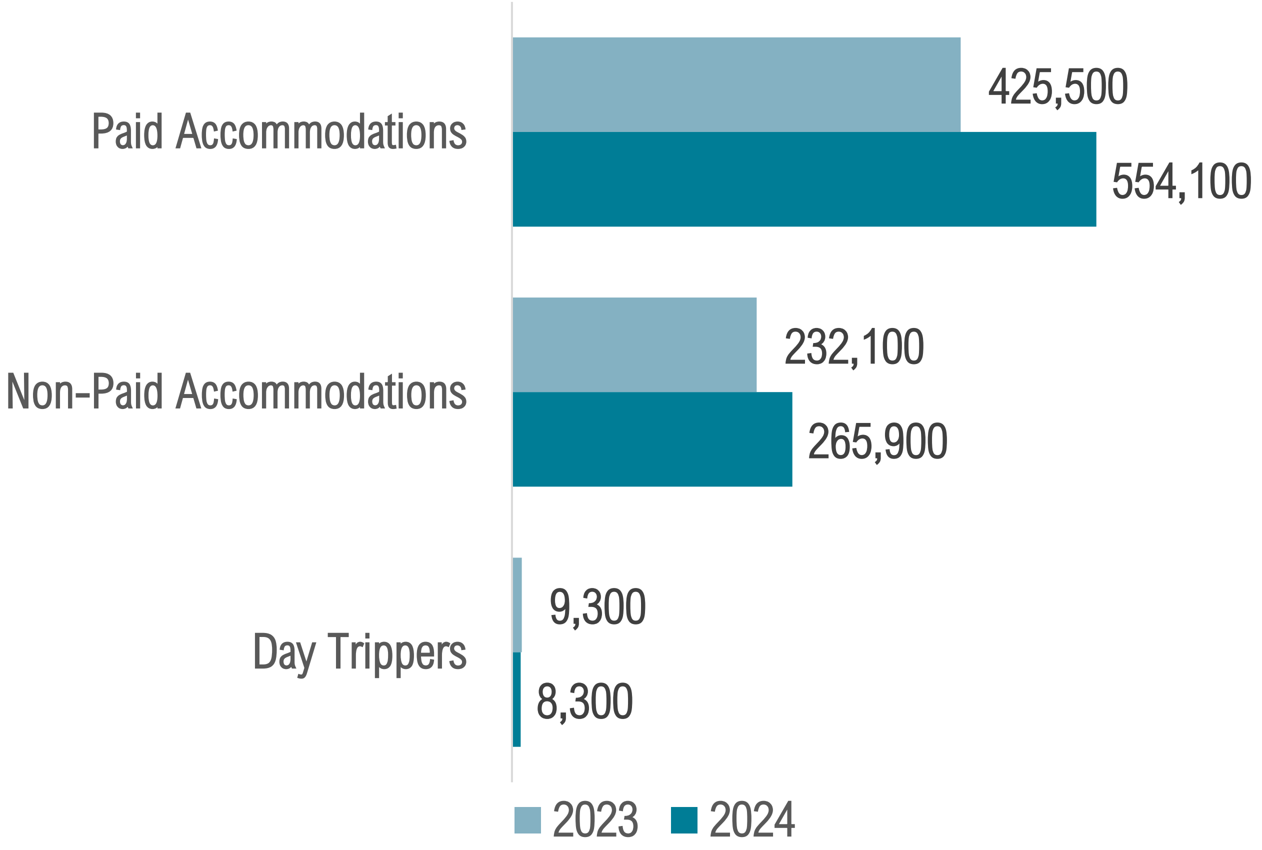
Detailed Findings

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

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

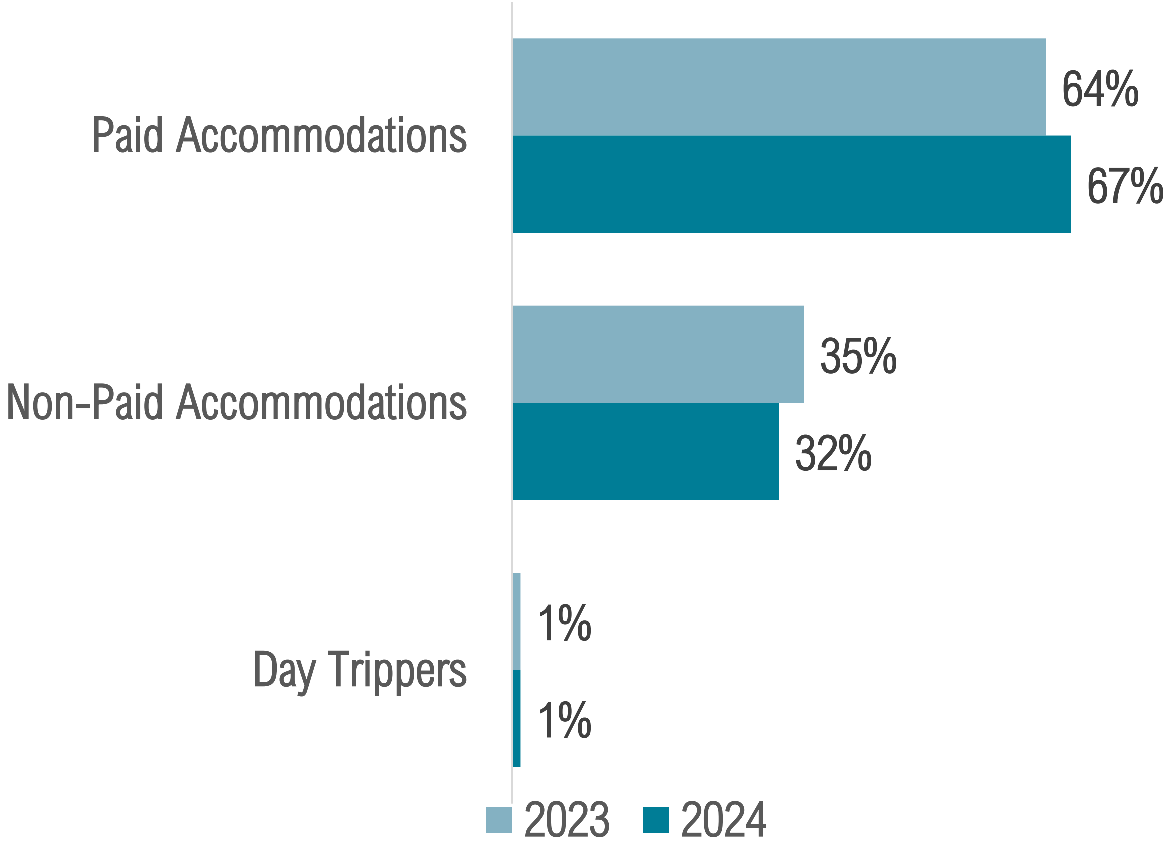
NUMBER OF VISITORS

There were 828,300[1] visitors to the Fort Myers area in Jan - Mar 2024 (+24.2% from 2023).



VISITOR TYPE

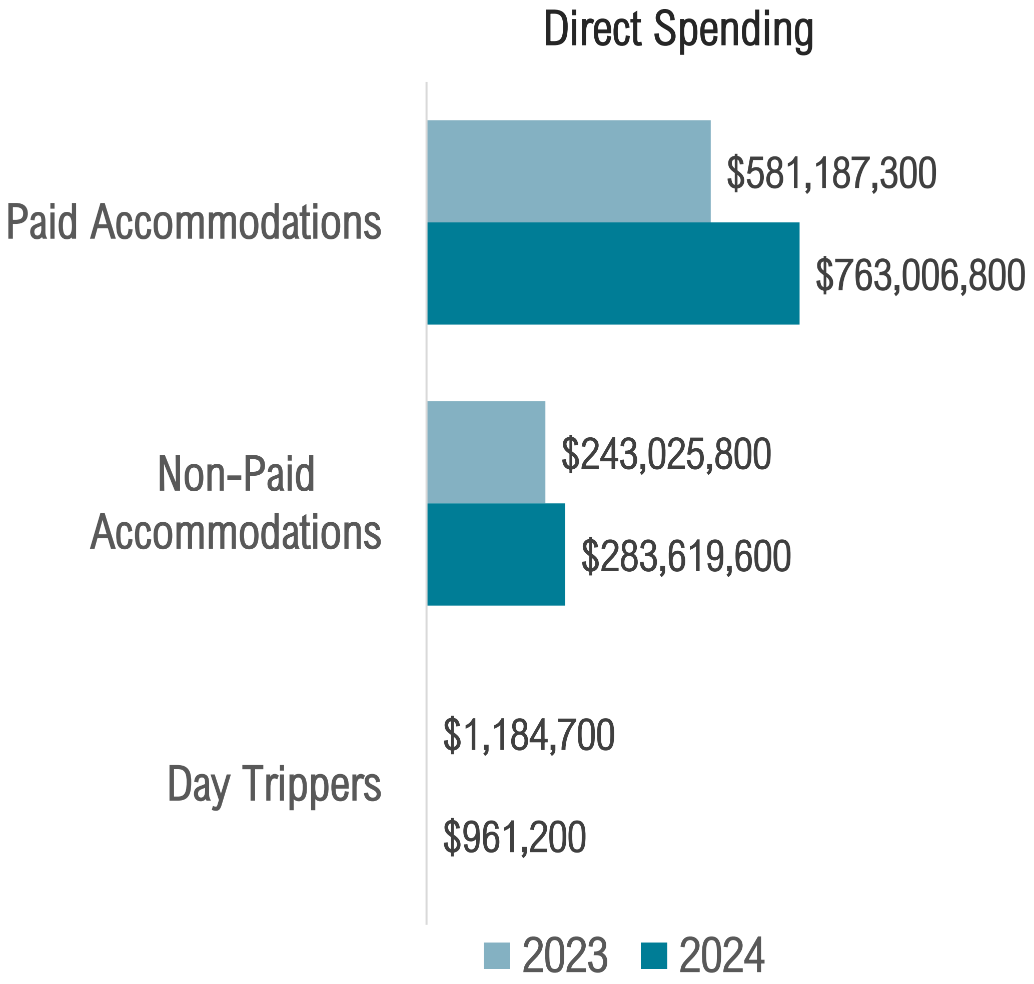
Visitors staying in paid accommodations accounted for 2 in 3 visitors.



VISITOR EXPENDITURES BY VISITOR TYPE

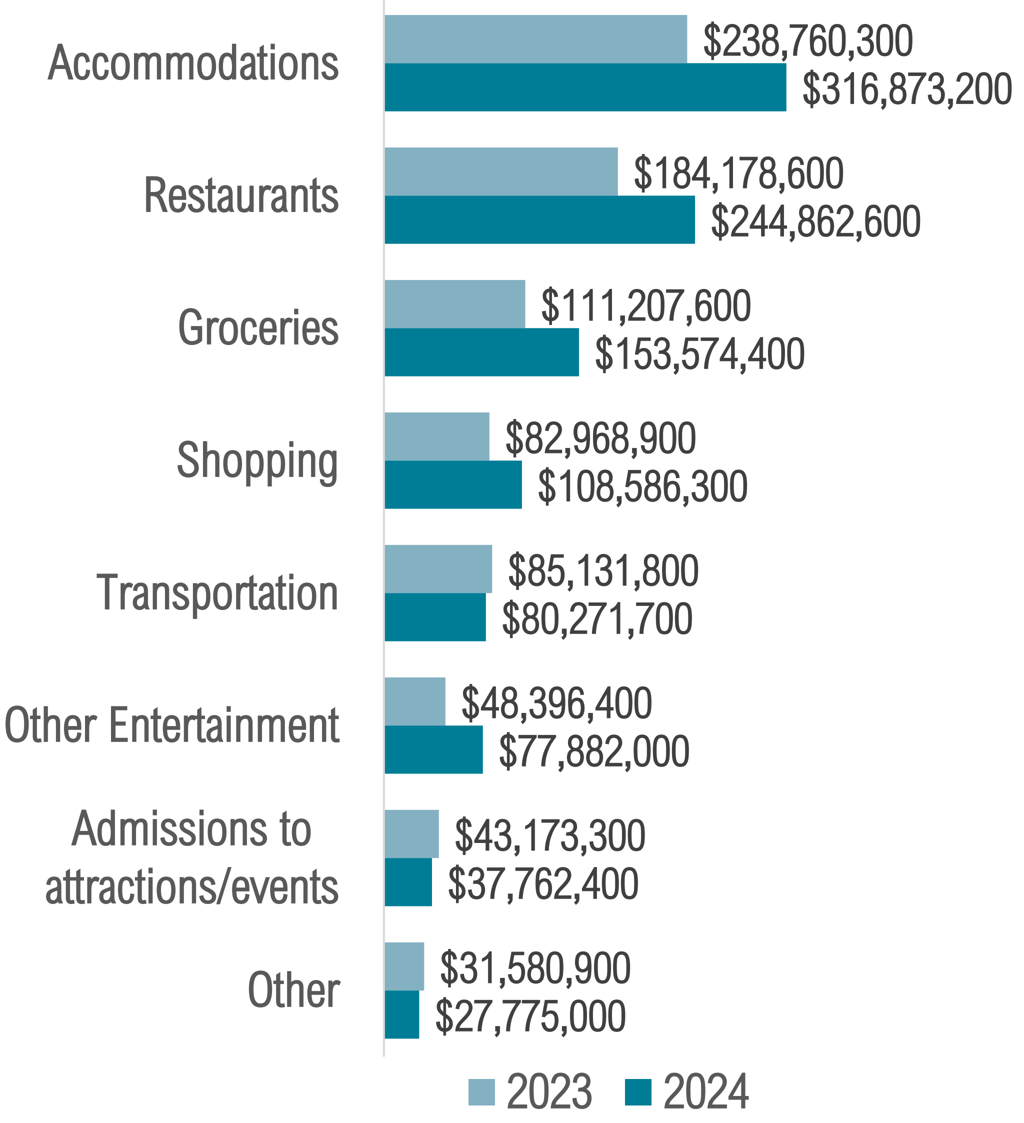
Jan - Mar visitors spent $1,047,587,600 in the Fort Myers area, resulting in a total economic impact of $1,668,807,000, up 26.3% from 2023.

Visitors staying in paid accommodations accounted for 67% of all visitors and 73% of all spending.



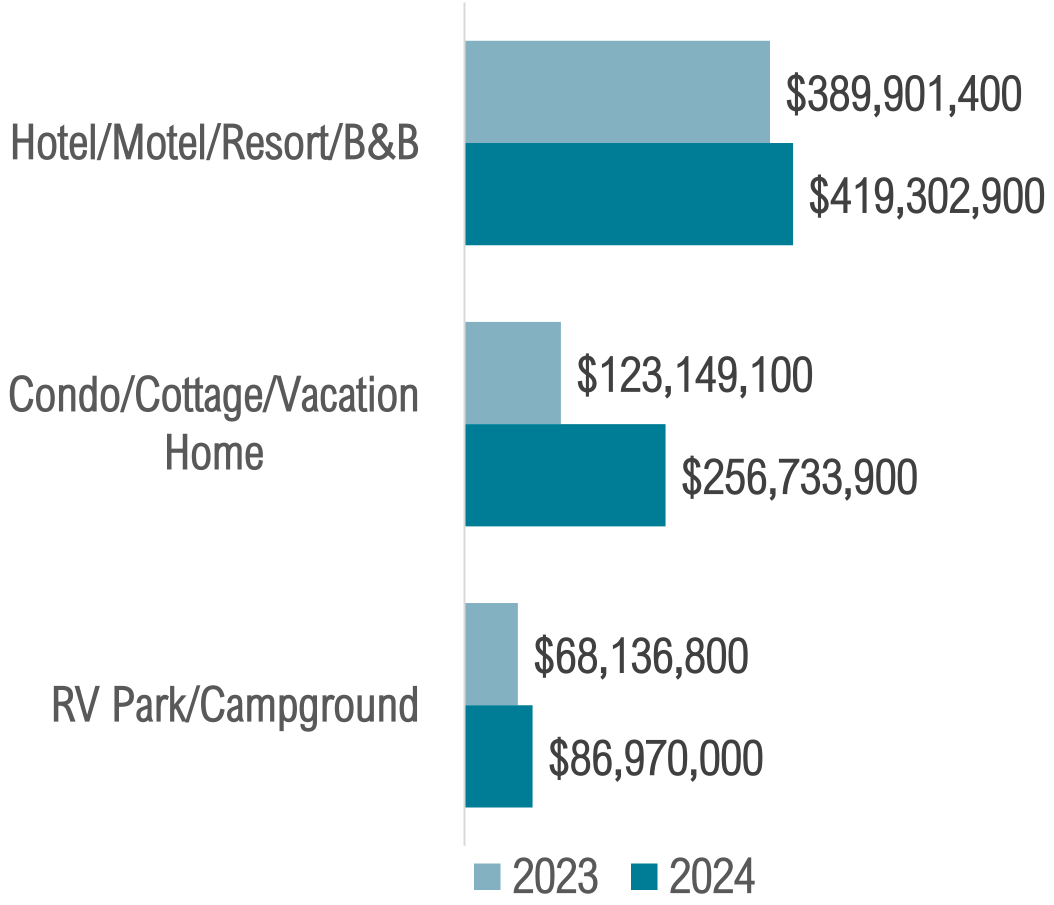
VISITOR EXPENDITURES BY SPENDING CATEGORY

Of the $1,047,587,600 visitors spent in the Fort Myers area, 30% was spent on accommodations and 23% was spent on restaurants, accounting for over half of all visitor spending.



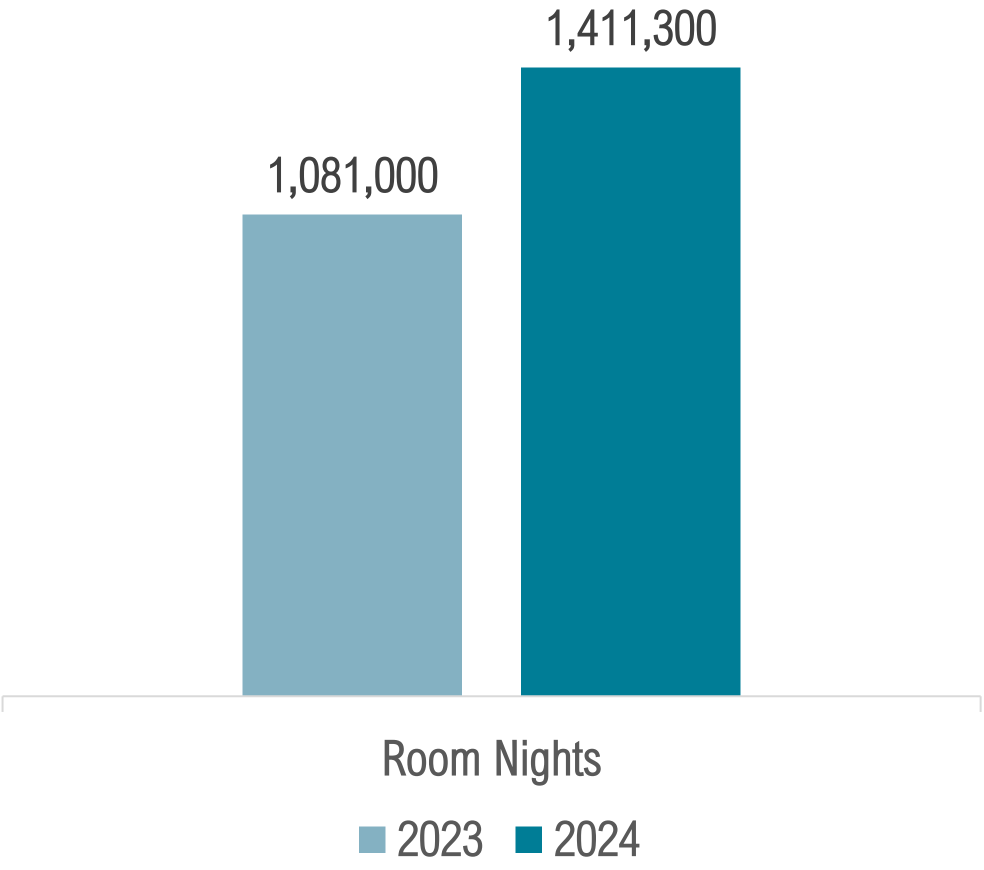
VISITOR EXPENDITURES BY LODGING TYPE

Jan - Mar visitors staying in paid accommodations spent $763,006,800 in the Fort Myers area.



ROOM NIGHTS GENERATED

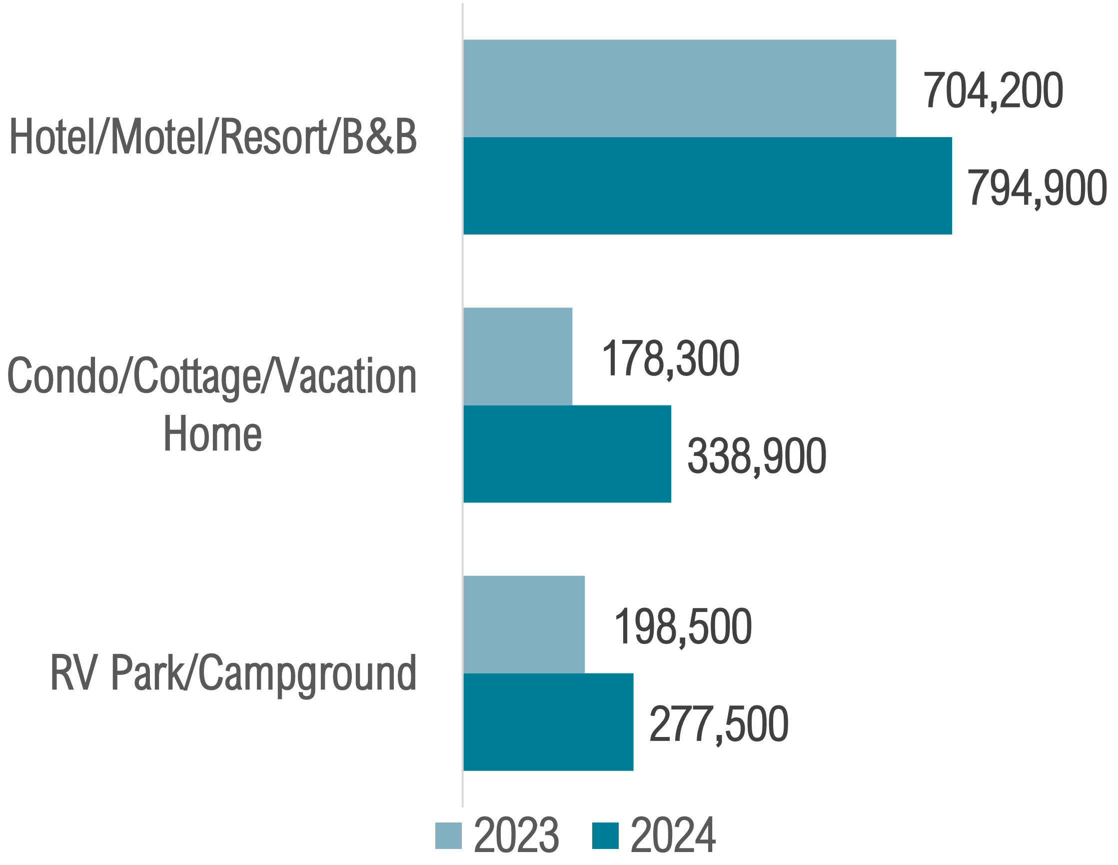
Jan-Mar visitors spent 1,411,300[1] nights in Fort Myers area hotels, resorts, condos, rental houses, RV parks, etc. (+30.6% from 2023).



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

ROOM NIGHTS GENERATED

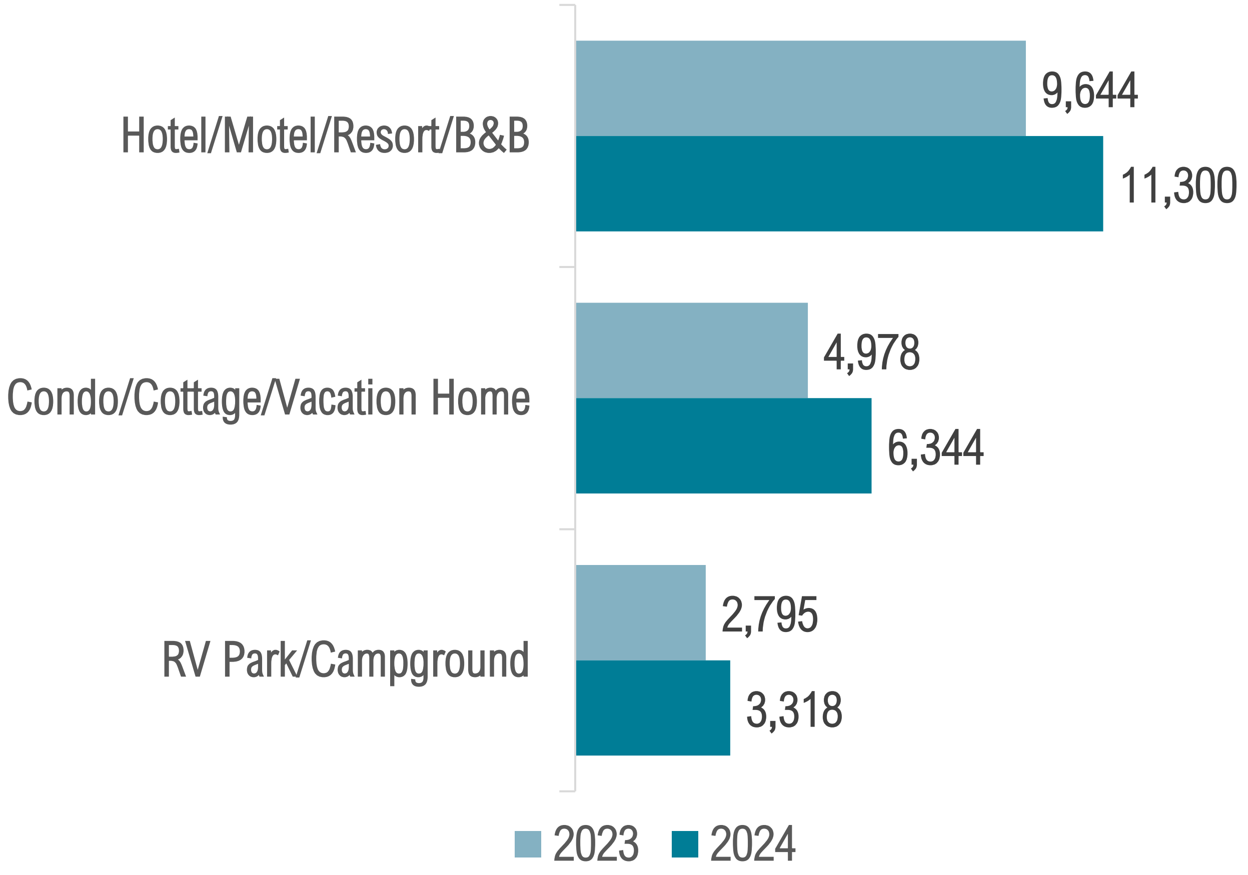
Hotels, motels, etc. accounted for **over half** of room nights spent in the Fort Myers area, while RV parks/campgrounds accounted for **nearly 1 in 5** room nights and vacation rentals accounted for the remaining **24%** of nights that visitors spent in the area.



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

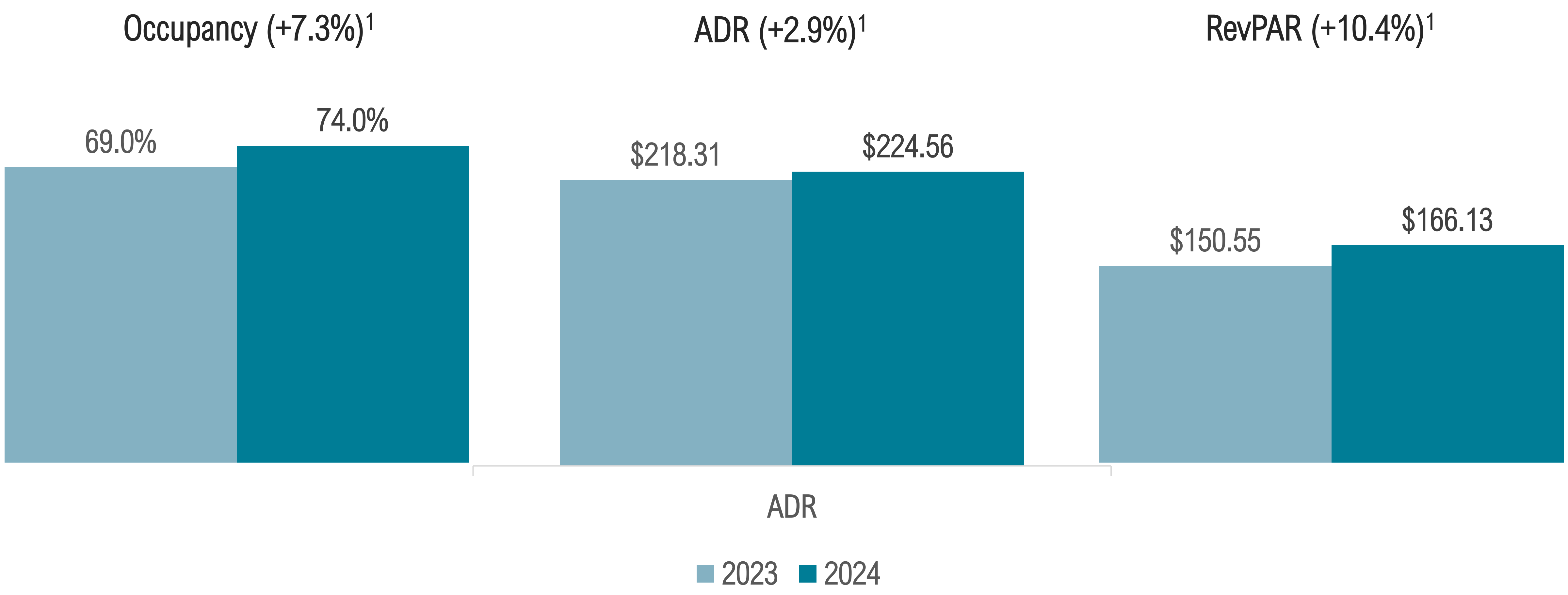
AVAILABLE UNITS

There were **20,962**[1] available units in Jan - Mar 2024 vs. 17,417 in 2023 (+20.4%). Over half of the units available were from hotels, motels, etc.



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

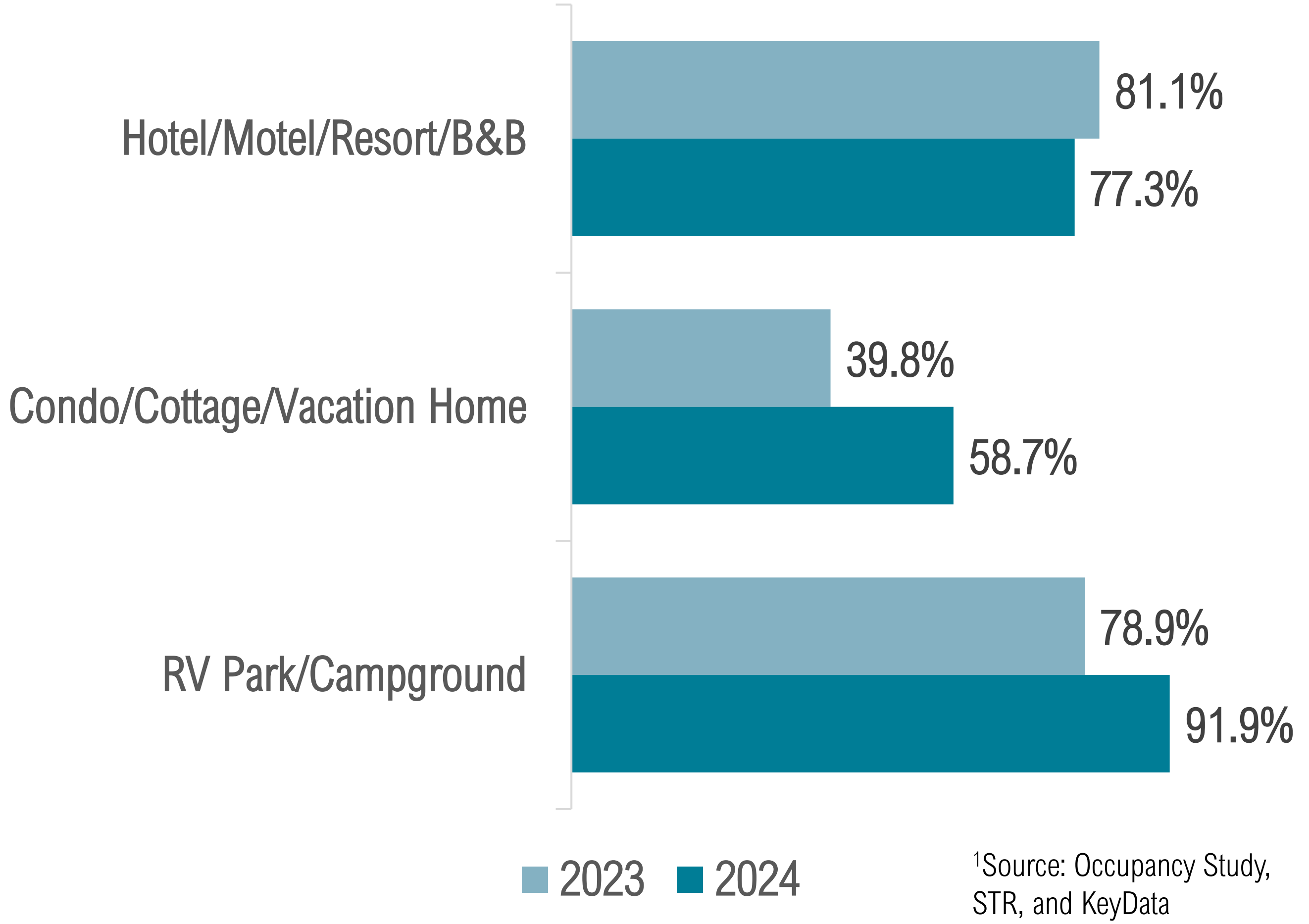
OCCUPANCY, ADR AND REVPAR



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

OCCUPANCY

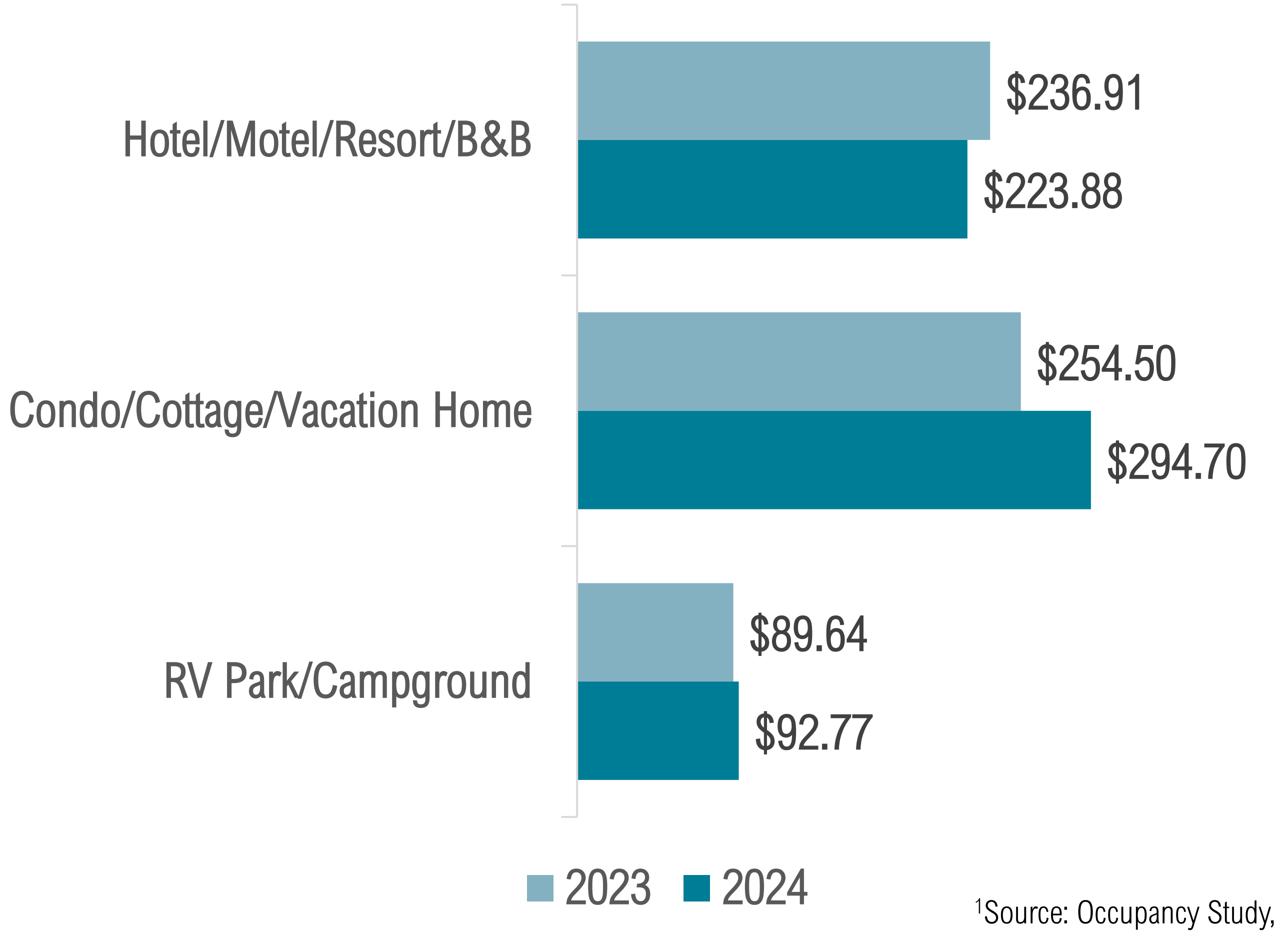
Average occupancy in Jan-Mar was **74.0%**[1] (69.0% in 2023).



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

ADR

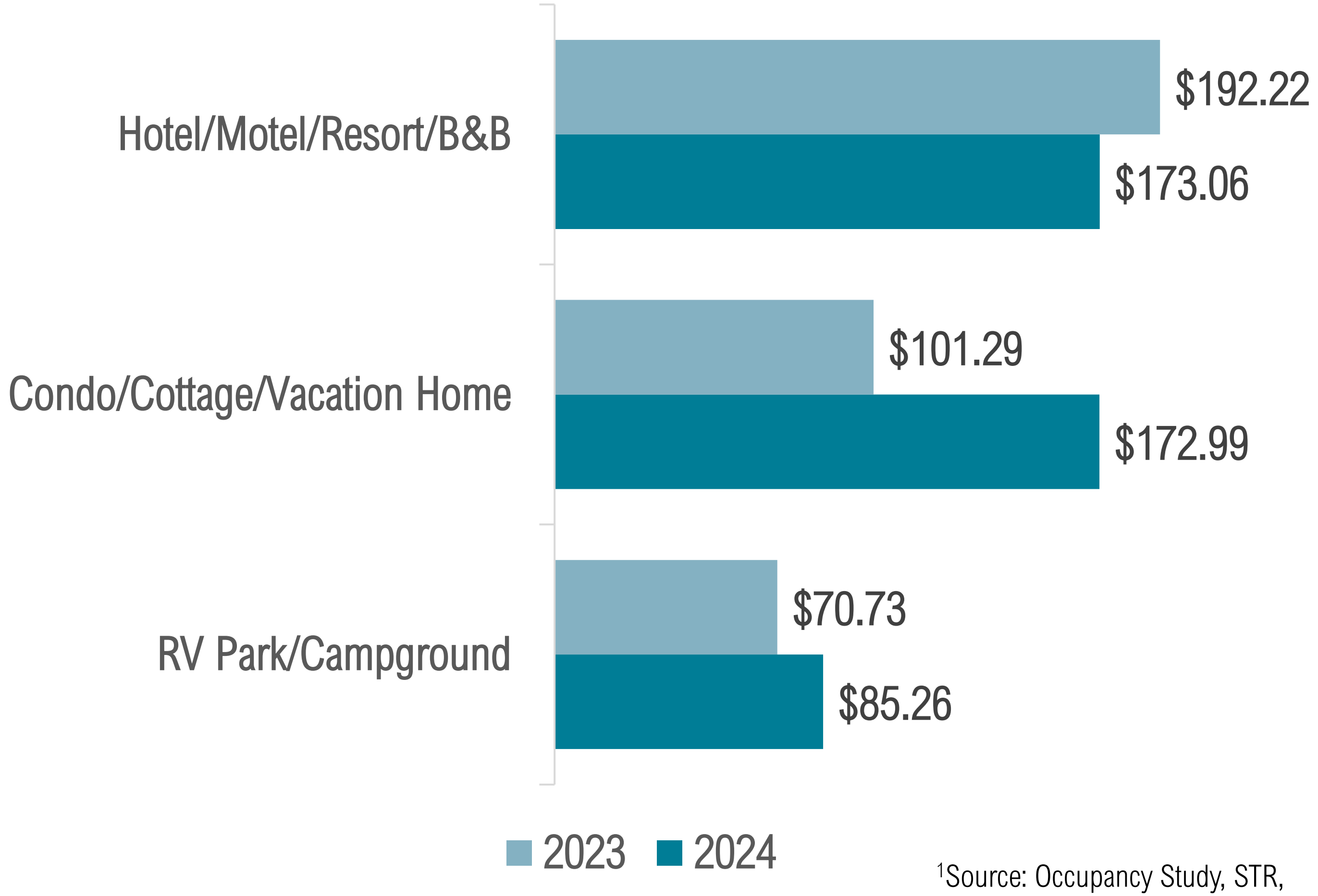
ADR in Jan-March was **$224.56**[1] ($218.31 in 2023).



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

REVPAR

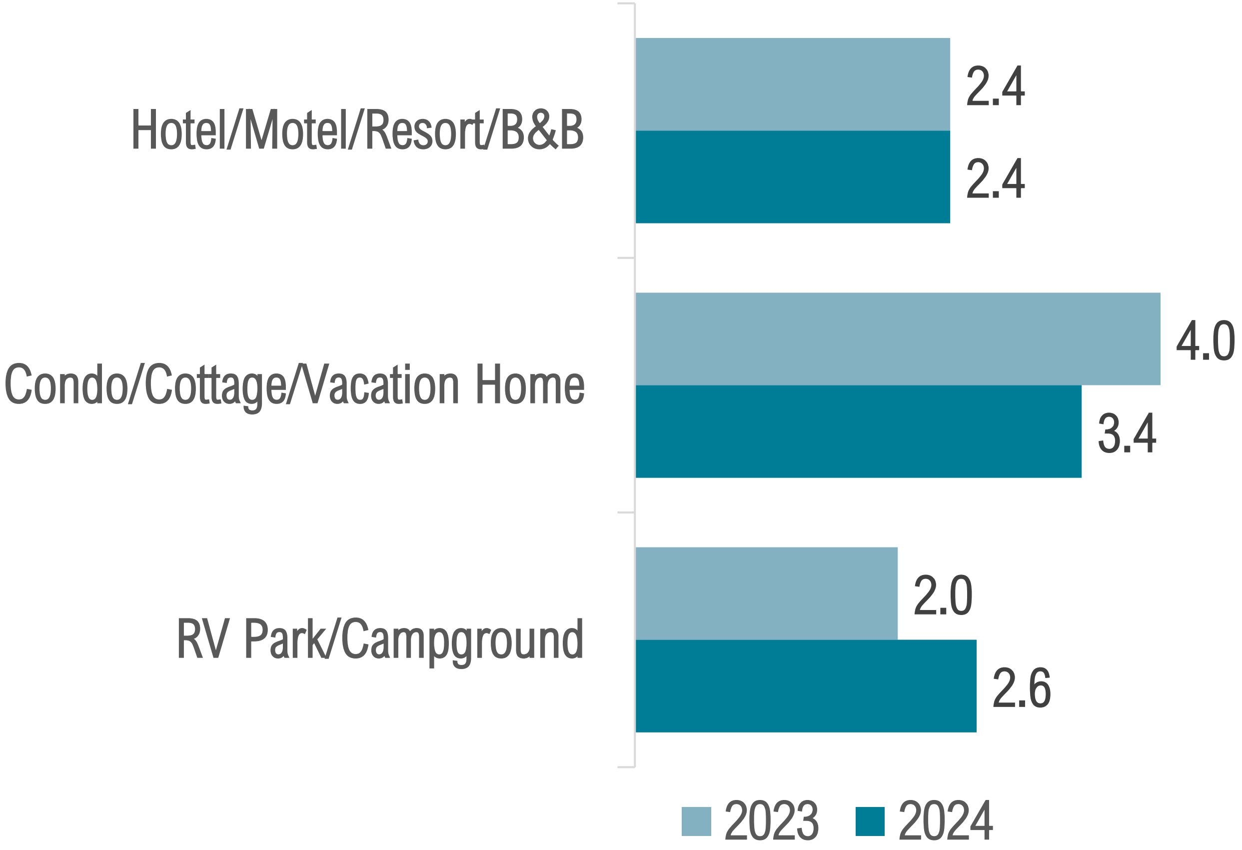
Average RevPAR in Jan-Mar was **$166.13**[1] ($150.55 in 2023).



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

TRAVEL PARTY SIZE

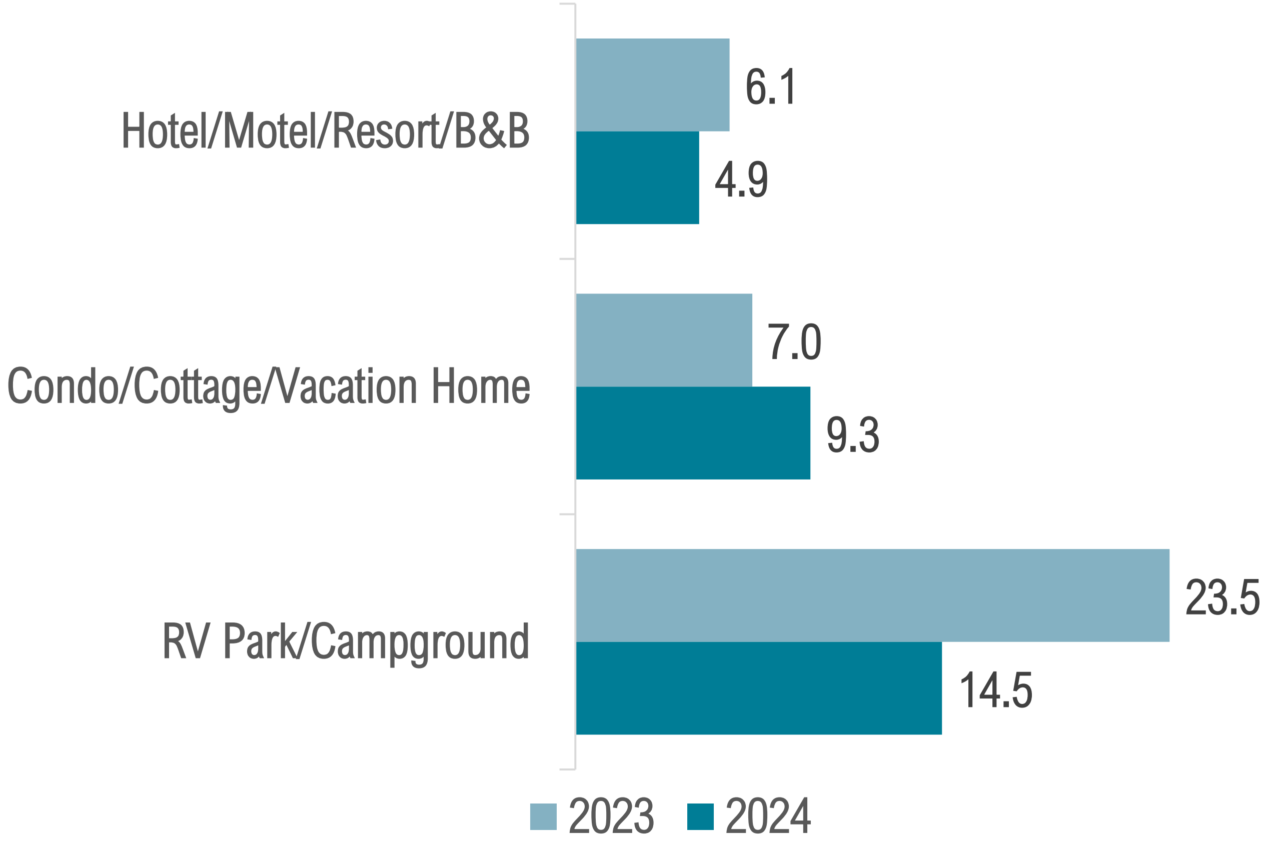
For visitors in paid accommodations, average travel party size in Jan-Mar was **2.6 people**[1] (2.8 people in 2023).



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

LENGTH OF STAY

For visitors in paid accommodations, average length of stay in Jan-Mar was **6.7 nights**[1] (7.1 nights in 2023).



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

Visitor Journey: Pre-Visit

Pre-Visit

Travel Party Profile

Trip Experience

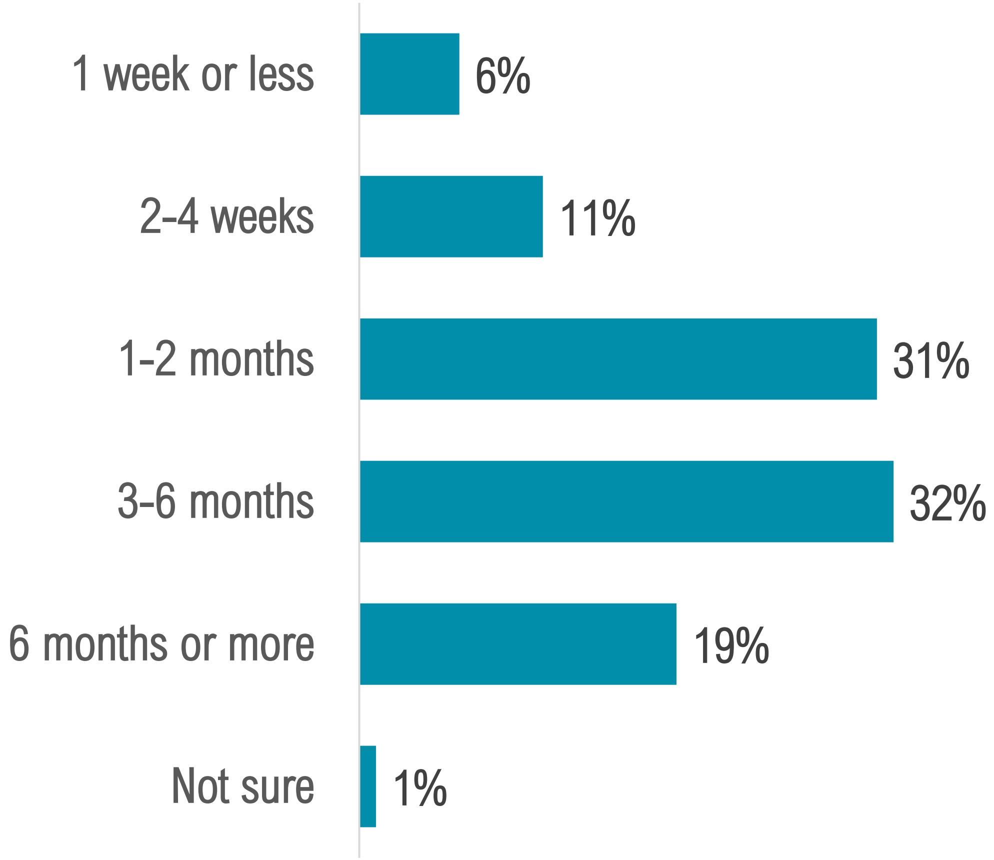
Post-Trip Evaluation

Economic Impact on Destination

TRIP PLANNING CYCLE

Nearly half of visitors planned their trip **less than 3 months** in advance, while **nearly 1 in 5** of visitors planned their trip **4 weeks or less** in advance.

The **average trip planning cycle** lasted **over 3 months** (94 days).

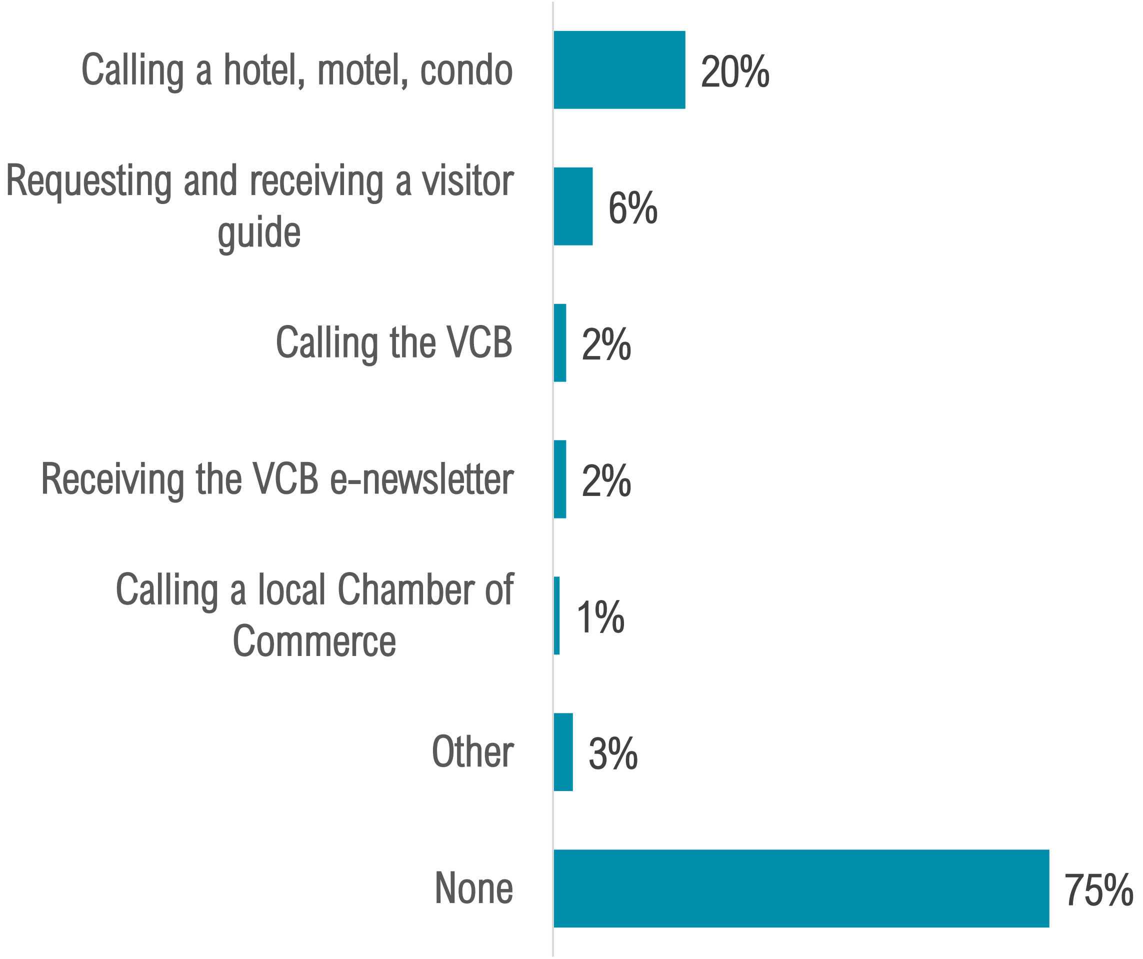


TRIP PLANNING: INFORMATION REQUESTS[1]

1 in 4 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 Q1 2024 was lower than in Q1 2023.



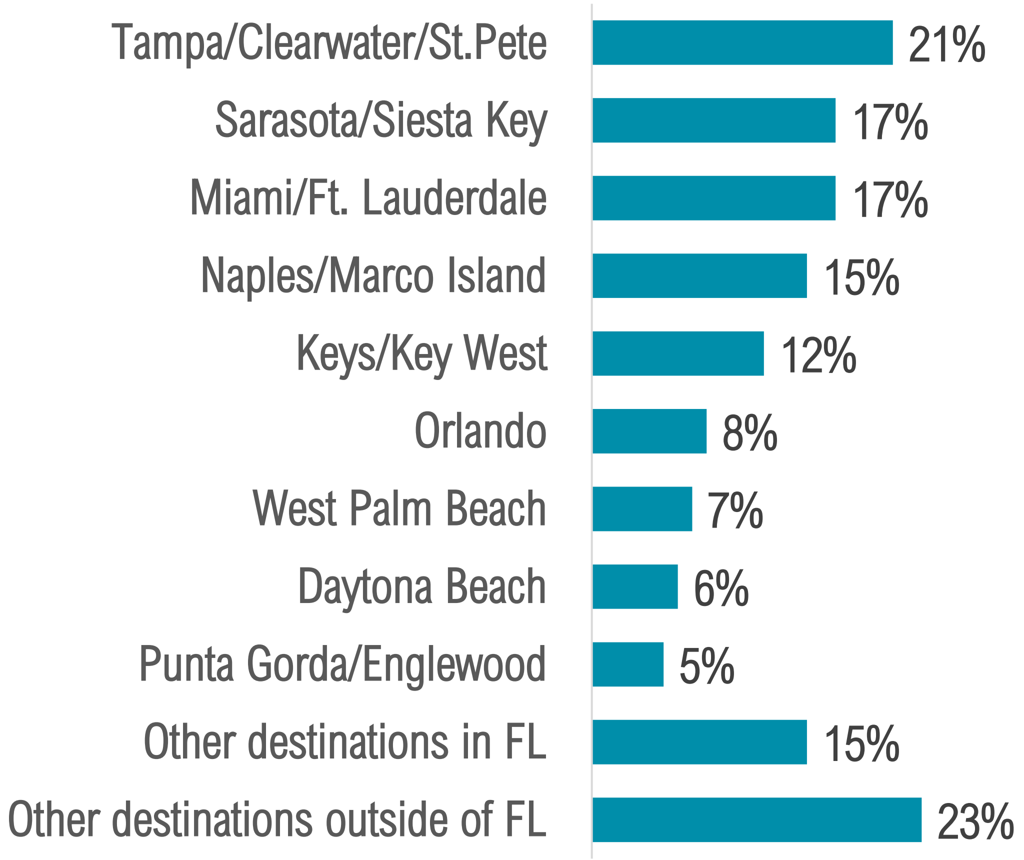
[1]Multiple responses permitted.

TRIP PLANNING: OTHER DESTINATIONS CONSIDERED[1]

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

Over 1 in 5 visitors considered visiting the Tampa Bay area.

BASE: 36% of visitors who considered other destinations



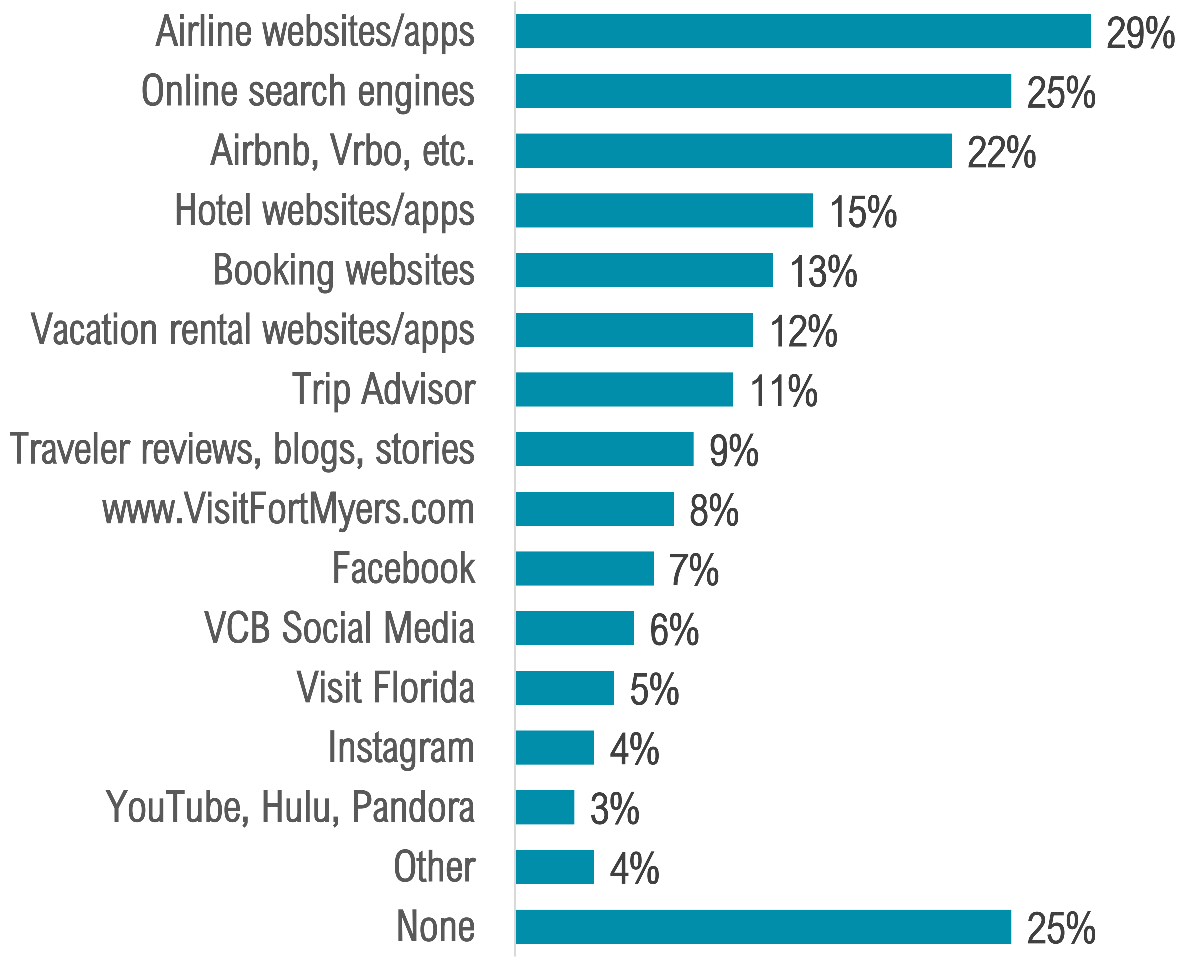
[1]Multiple responses permitted.

TRIP PLANNING: WEBSITES/APPS USED[1]

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.

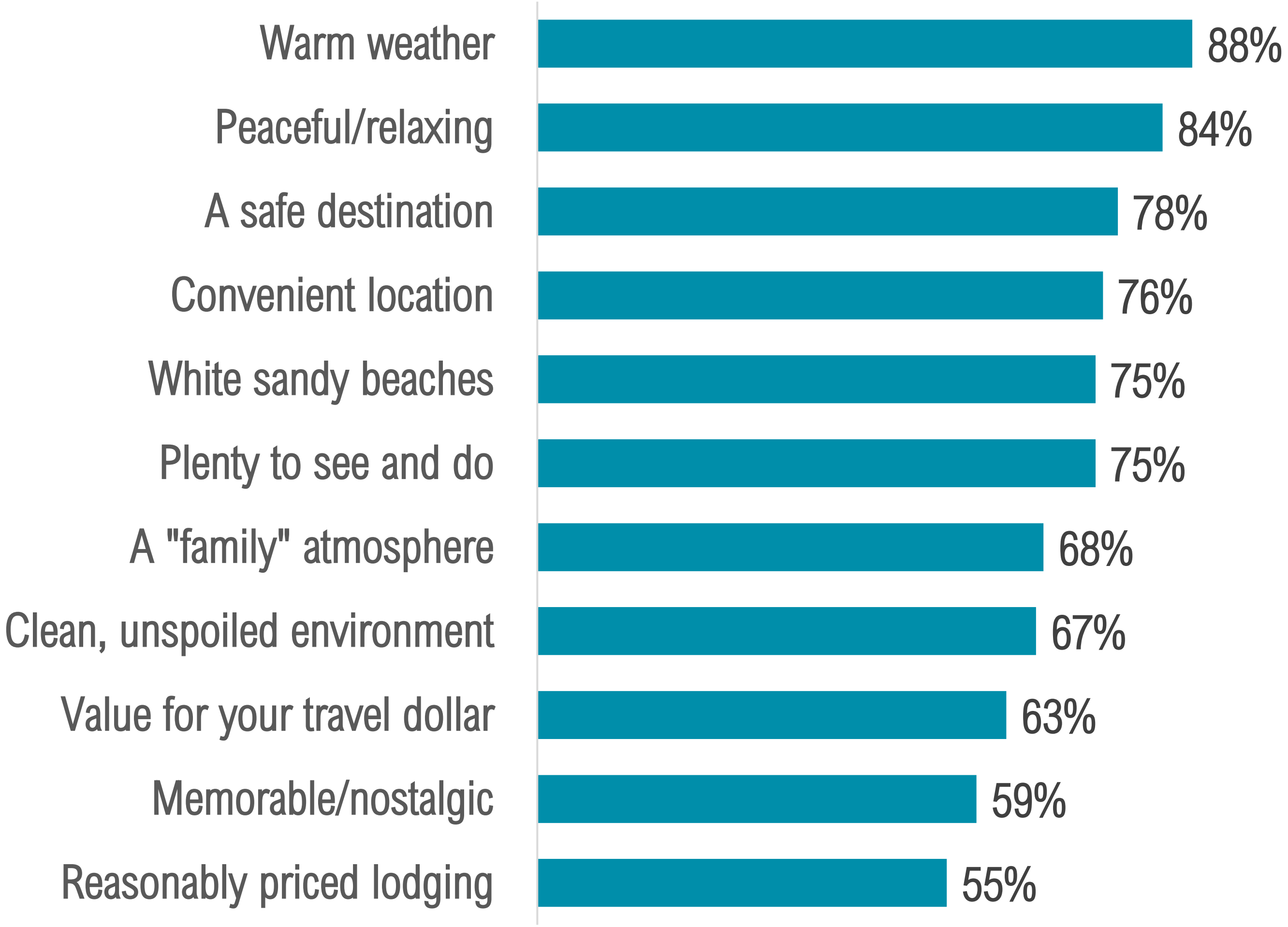
Half of visitors used either **Airbnb, Vrbo, hotel websites/apps**, or **booking websites** to plan their trips.



[1]Multiple responses permitted.

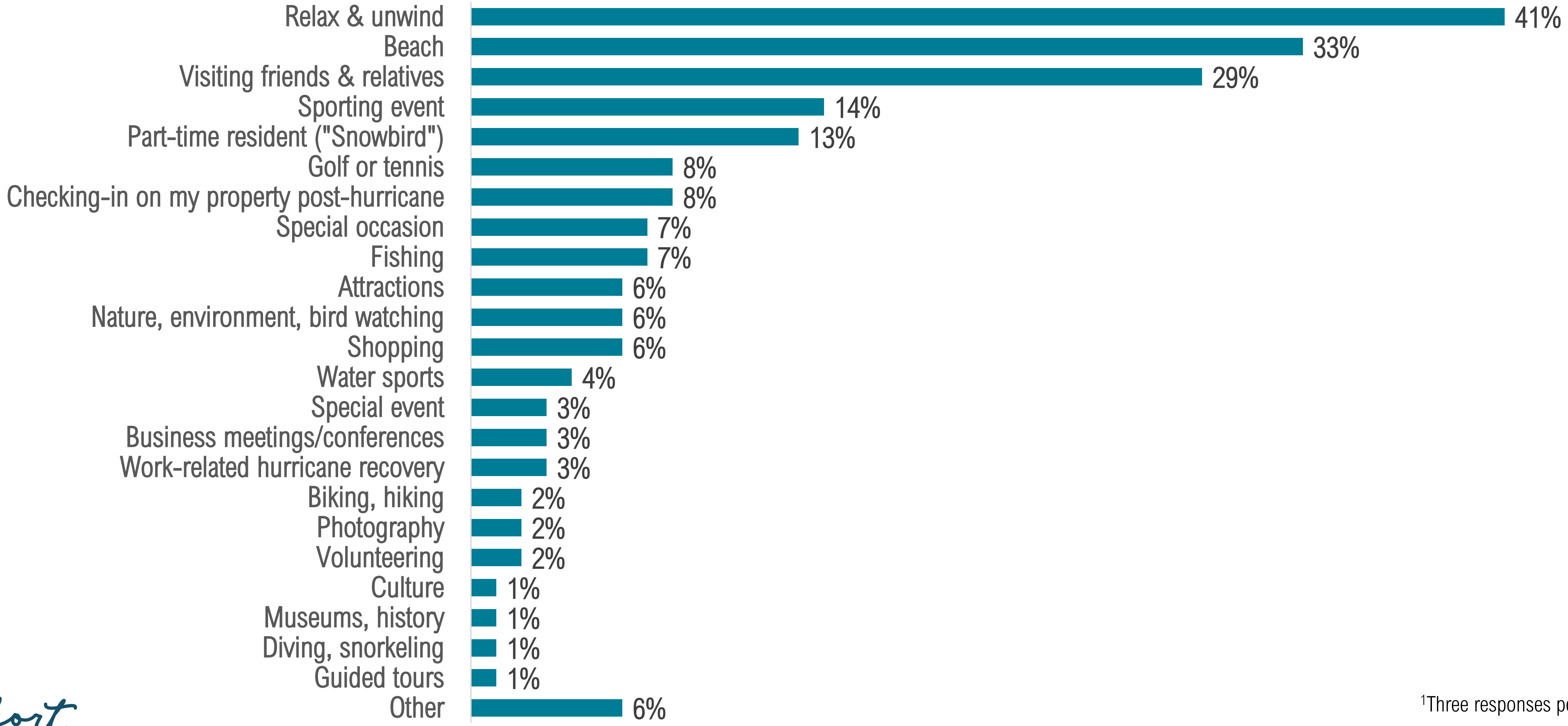
TRIP INFLUENCERS[1]

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.

Pre-Visit
Jan - Mar 2024

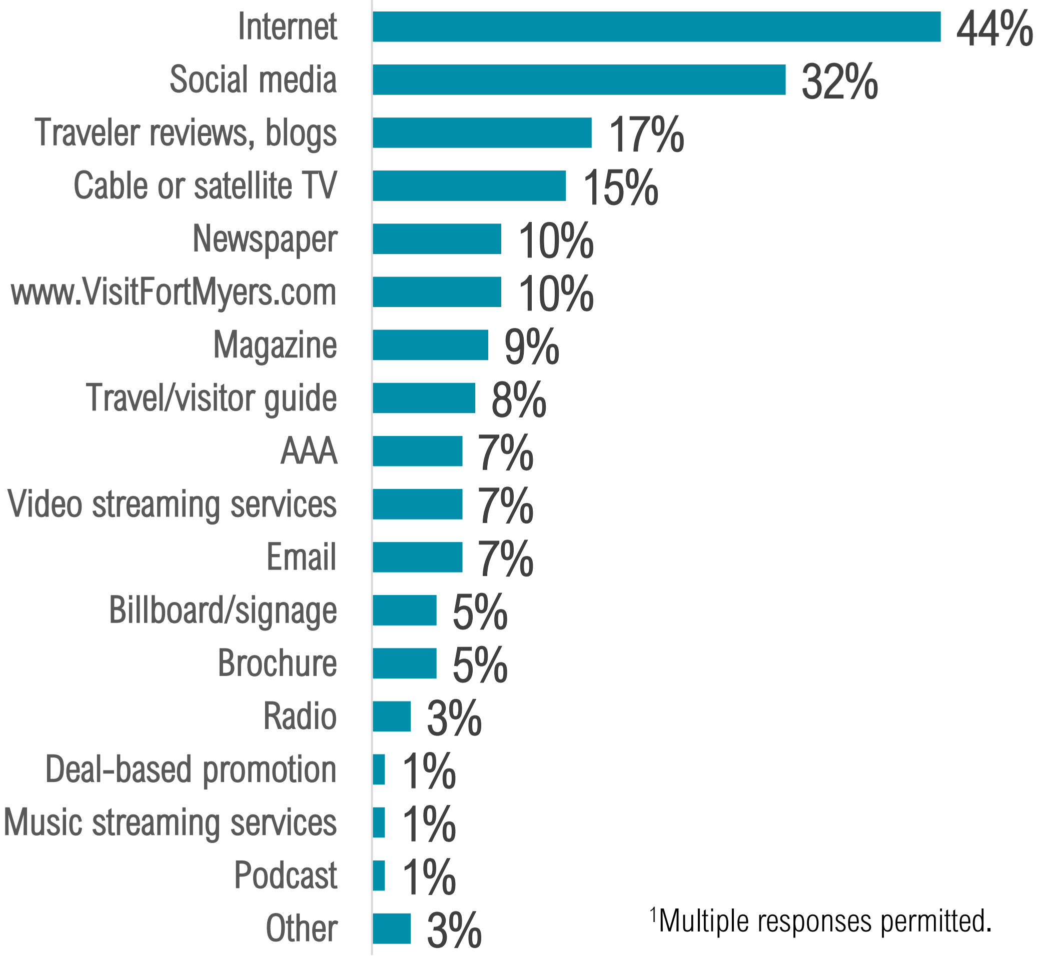
PROMOTIONS RECALL[1]

44% 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.

BASE: 44% of visitors who recalled promotions

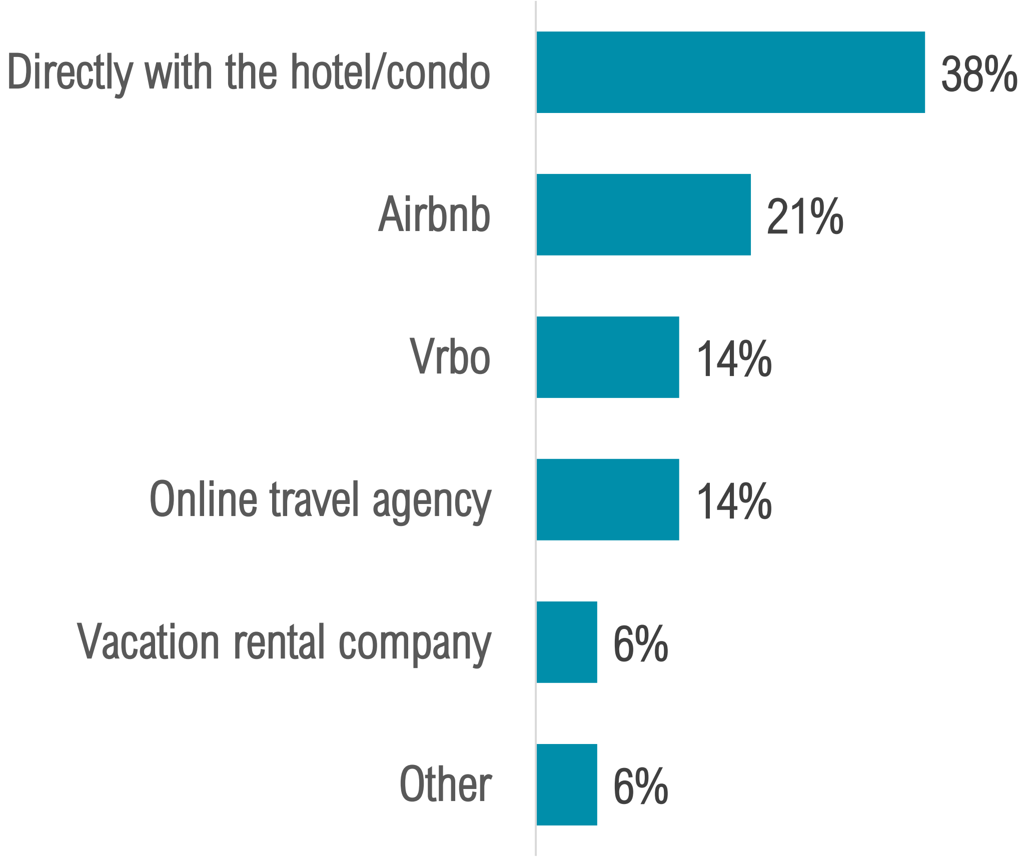
Source of Promotion



[1]Multiple responses permitted.

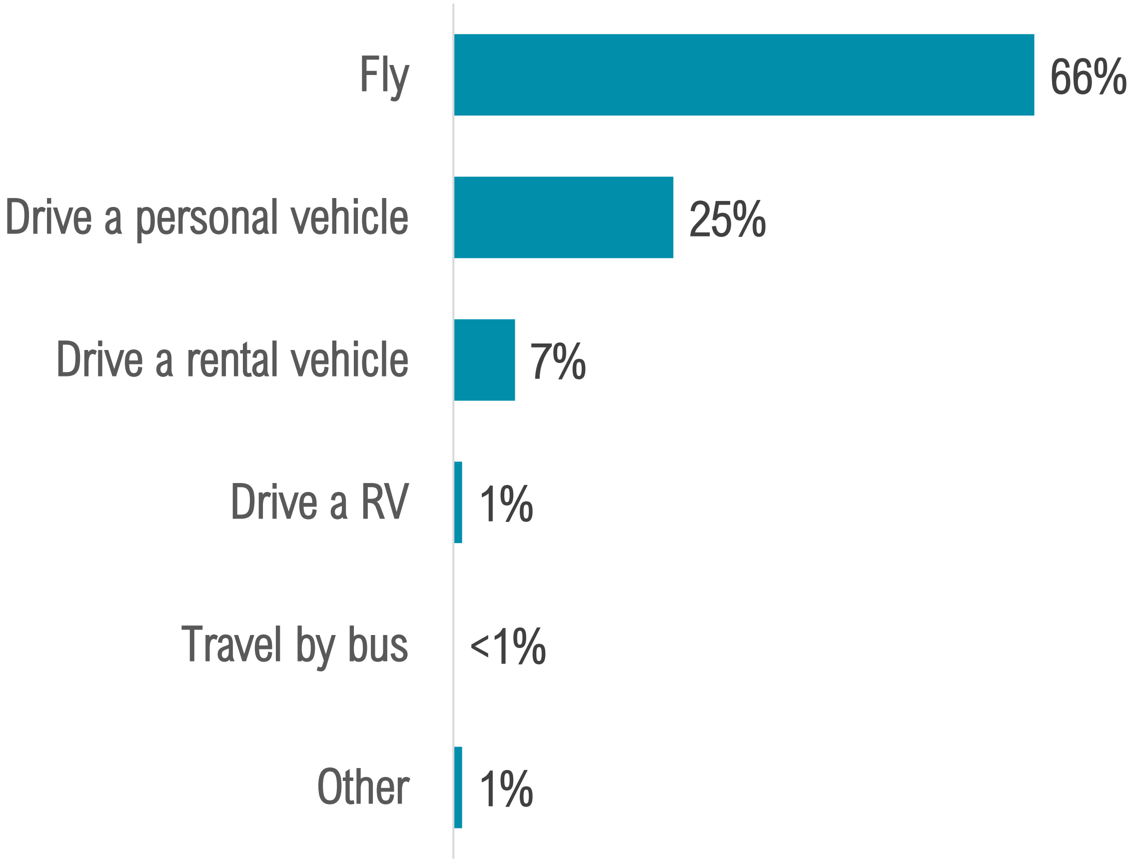
BOOKING

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



TRANSPORTATION

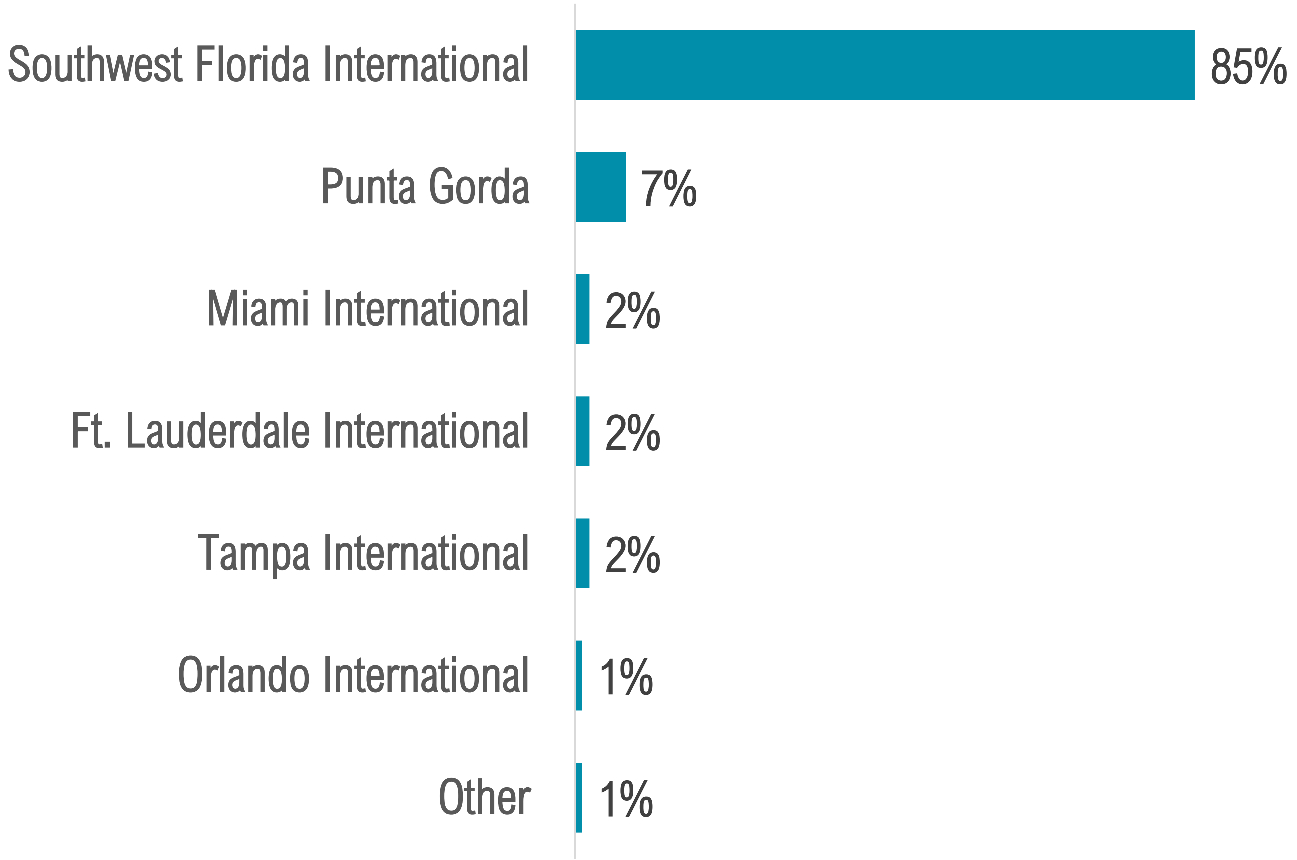
2 in 3 visitors **flew** to the Fort Myers area.



AIRPORT

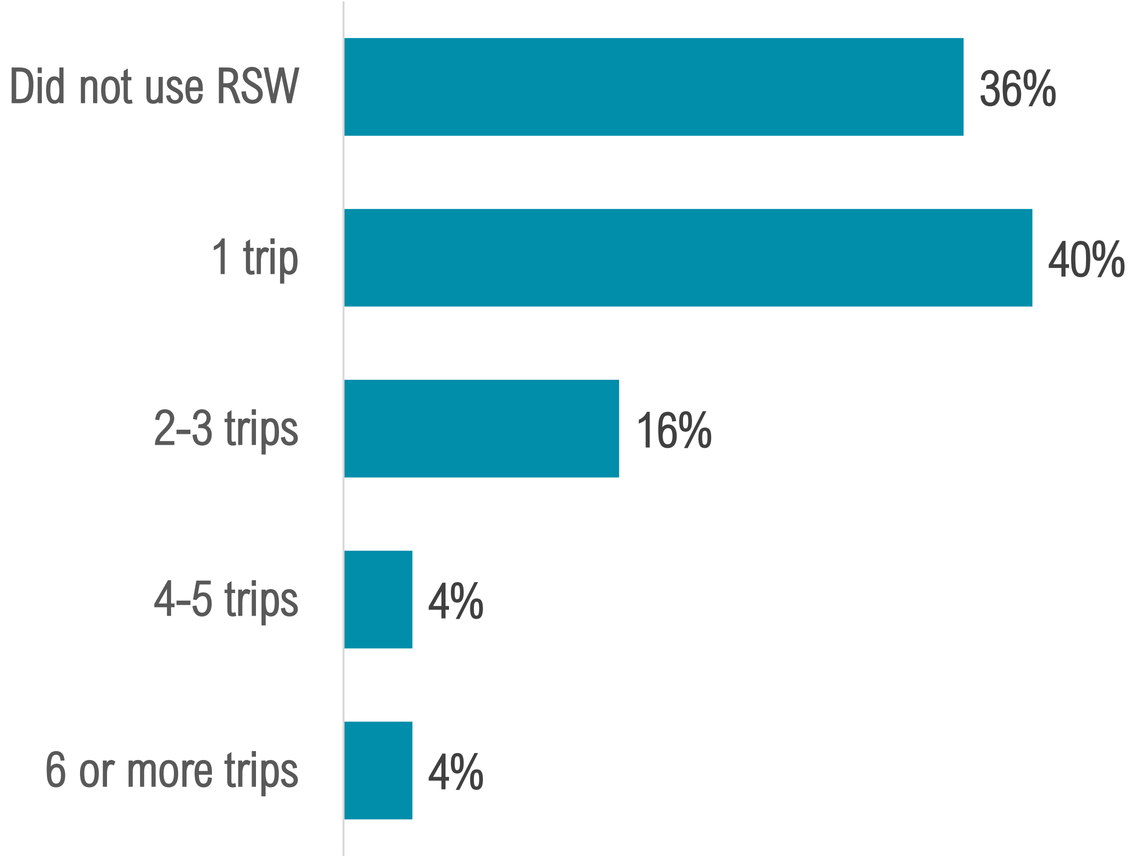
Over 4 in 5 visitors who flew to the Fort Myers area came through RSW.

BASE: 66% of visitors who flew



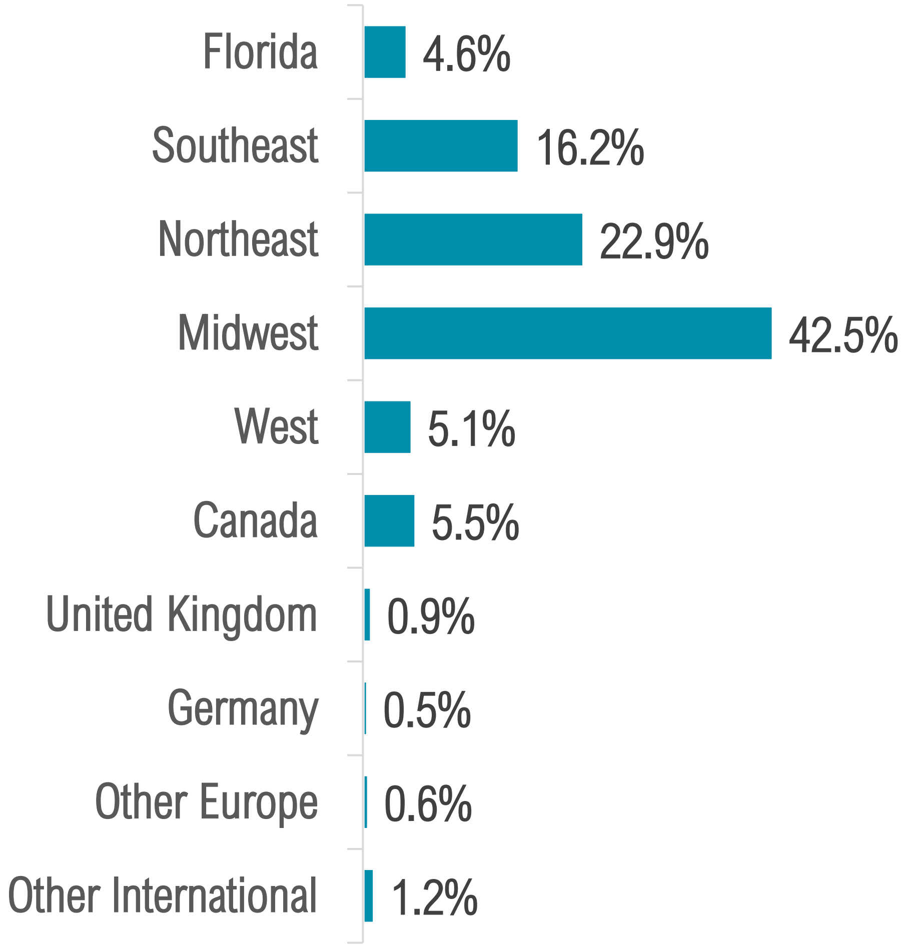
USE OF RSW IN THE PAST YEAR

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



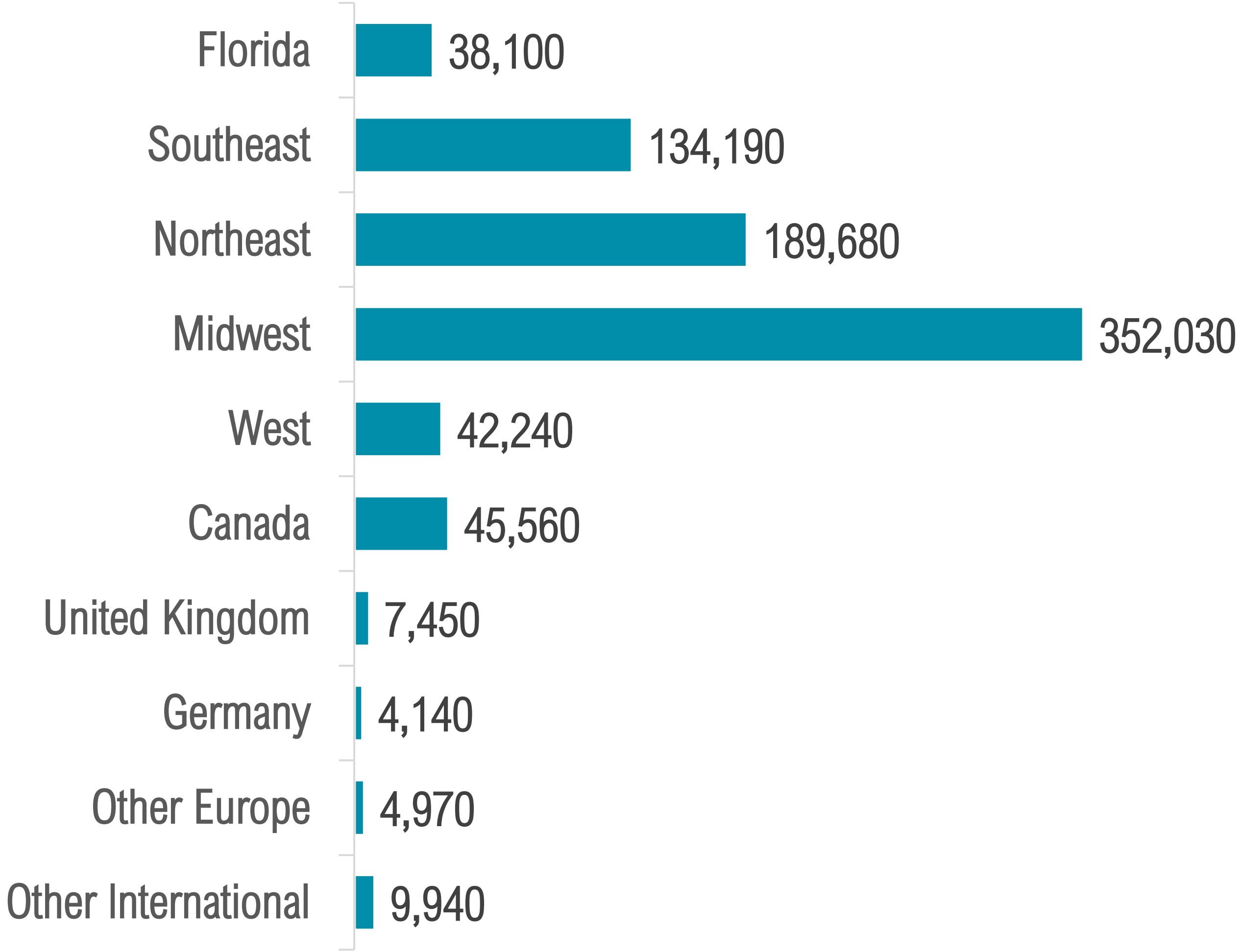
VISITOR JOURNEY: TRAVEL PARTY PROFILE

ORIGIN[1]



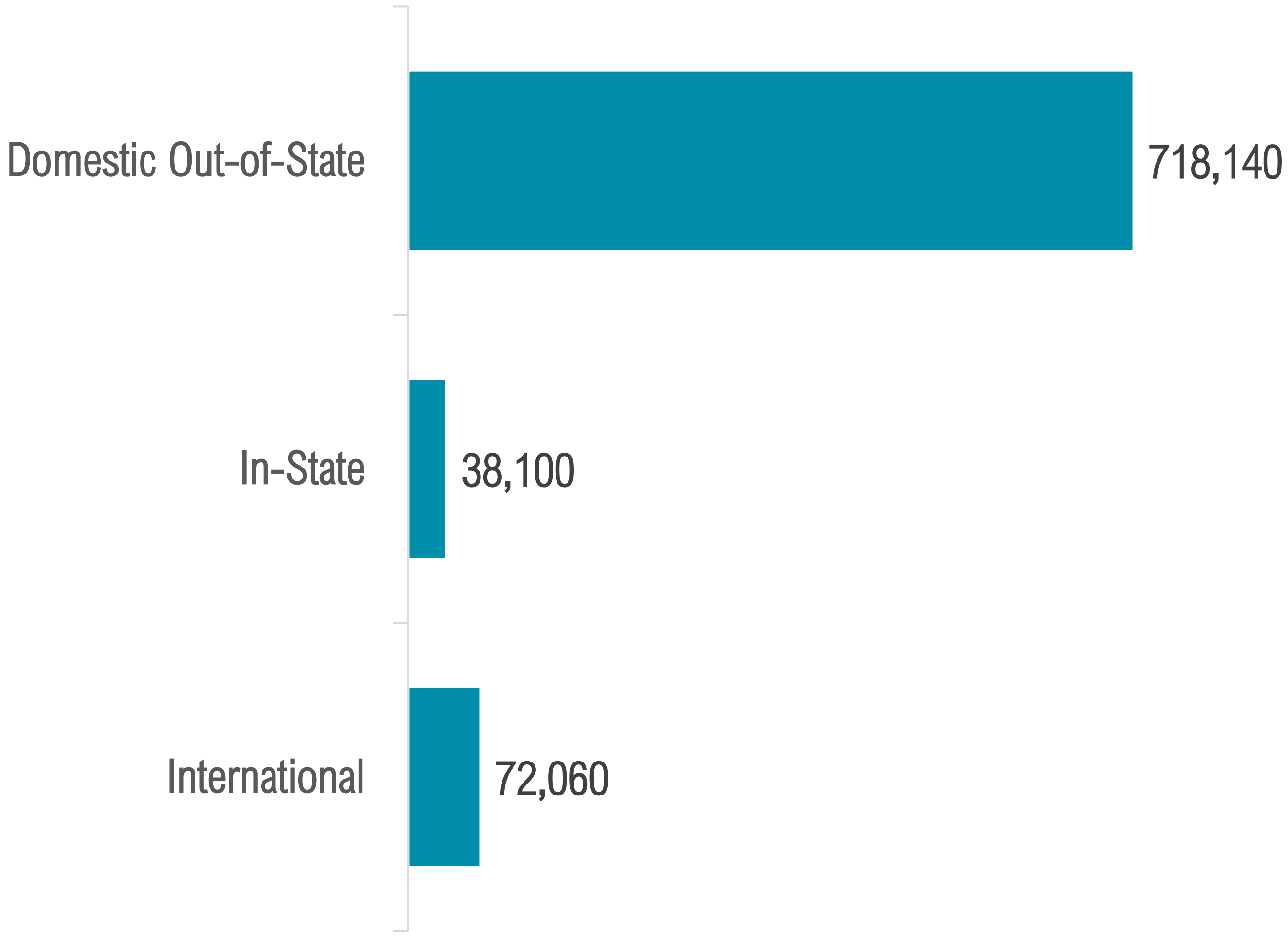
[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers. Based on data from the Visitor Tracking Study.

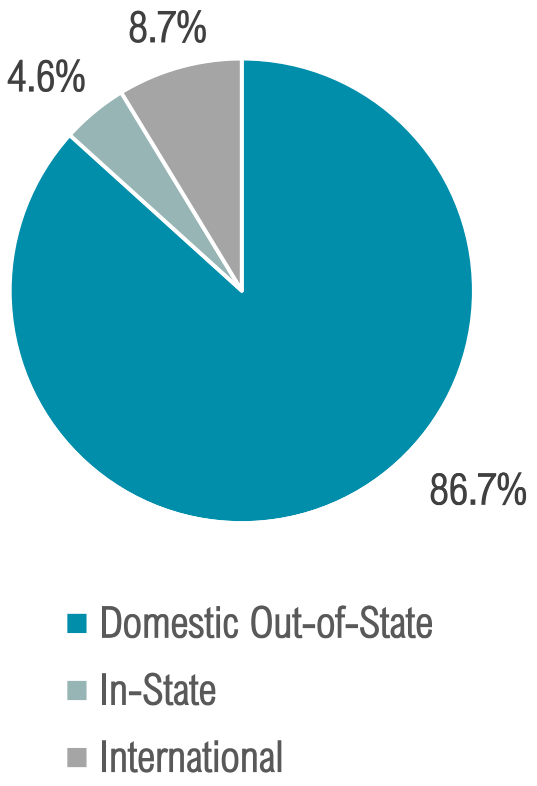
NUMBER OF VISITORS BY ORIGIN[1]



[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
Minneapolis - Saint Paul	8%
New York	4%
Boston	4%
Detroit	4%
Chicago	3%
Philadelphia	3%
Atlanta	3%
Indianapolis	2%
Cleveland – Akron	2%
Des Moines – Ames	2%
Milwaukee	2%
Louisville	2%

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

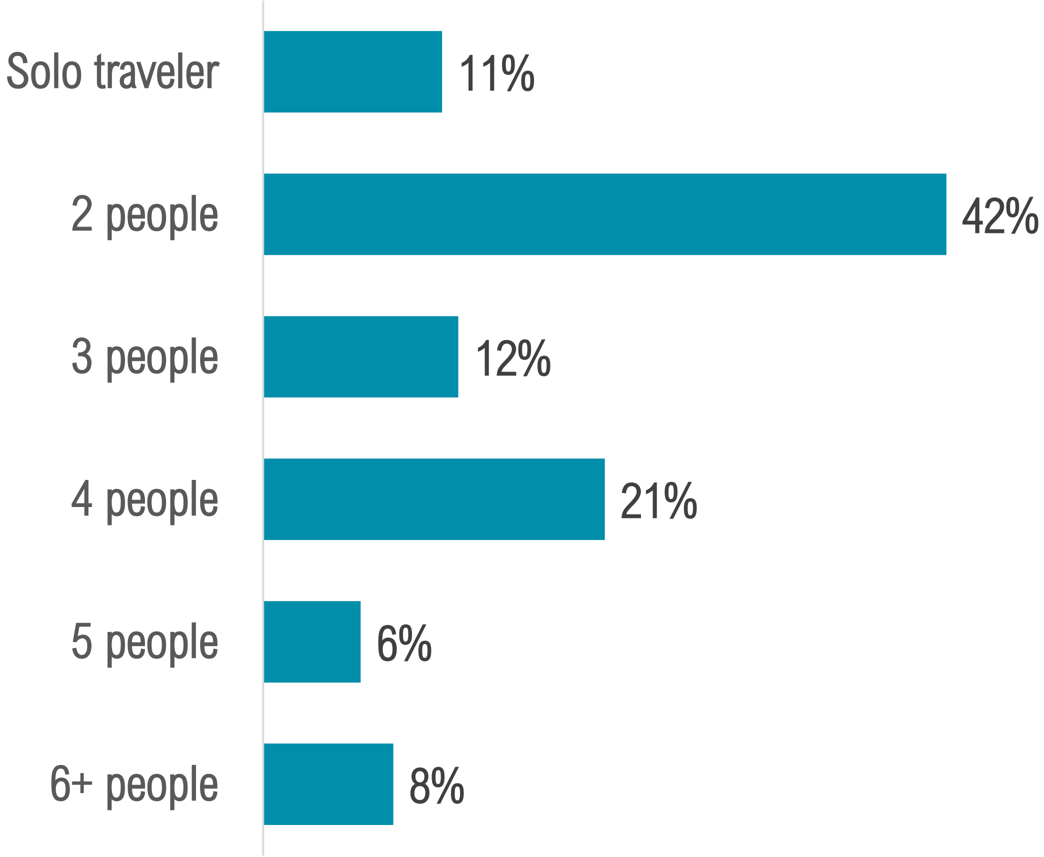
TRAVEL PARTY SIZE AND COMPOSITION

Travel Party Size

Visitors traveled in a party composed of **2.7[1] people**.

Travel with Children

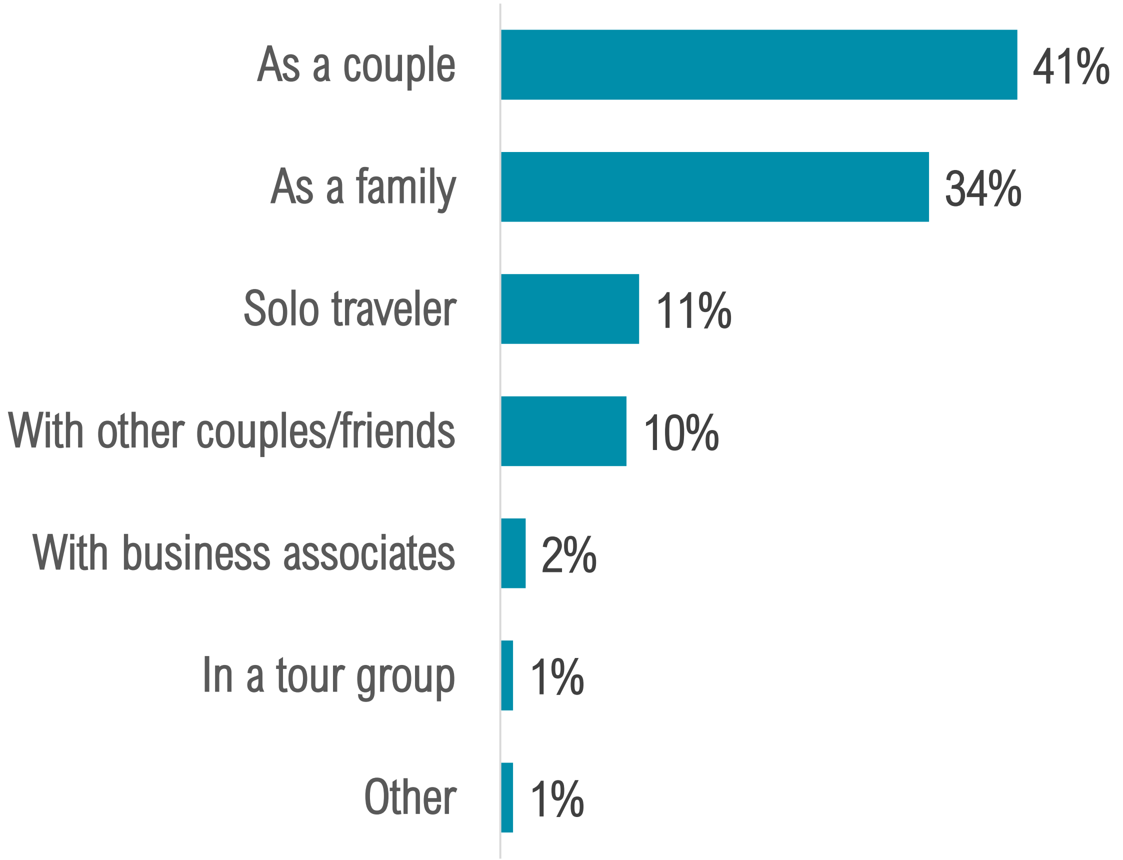
27% of visitors **traveled with children** under the age of 18.



[1] Sources: Occupancy Study and Visitor Tracking Study

TRAVEL PARTY TYPE

3 in 4 visitors traveled either as a family or as a couple, while 11% of visitors traveled alone.



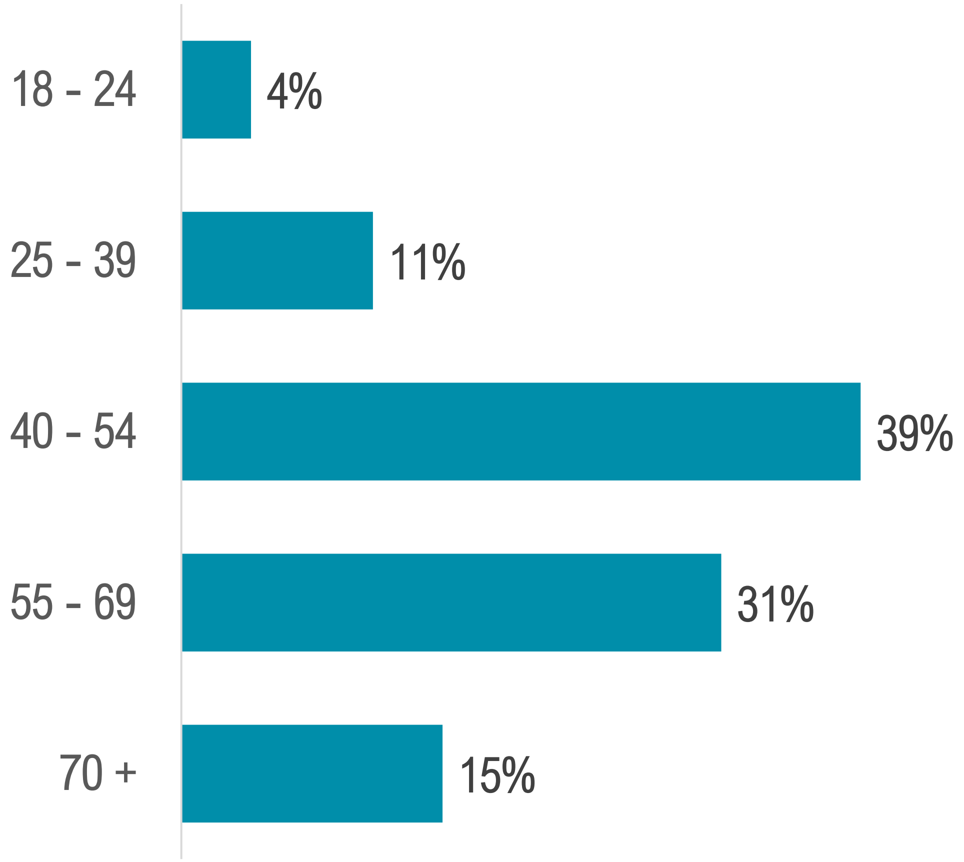
AGE

Average Age

The average age of Jan – Mar visitors was **53 years old.**

Median Age

The median age of Jan - Mar visitors was **53 years old.**

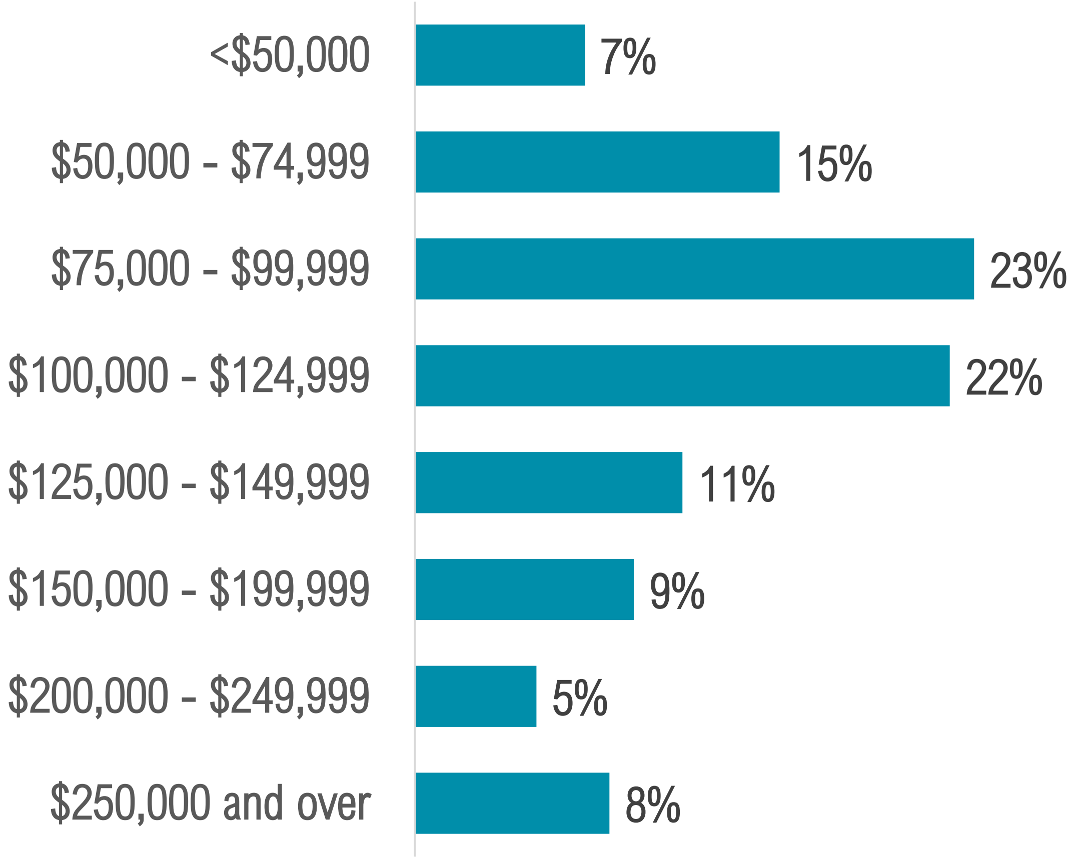


HOUSEHOLD INCOME

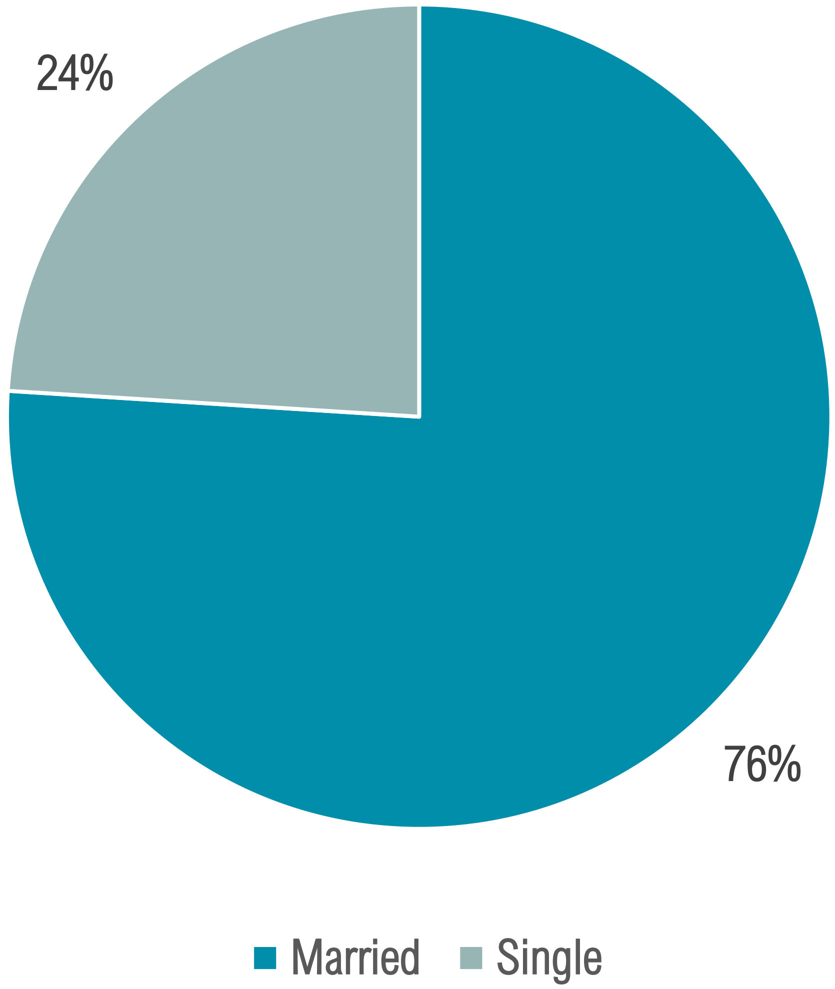
Median Household Income

Jan - Mar visitors had a median household income of **$105,300.**

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



MARITAL STATUS



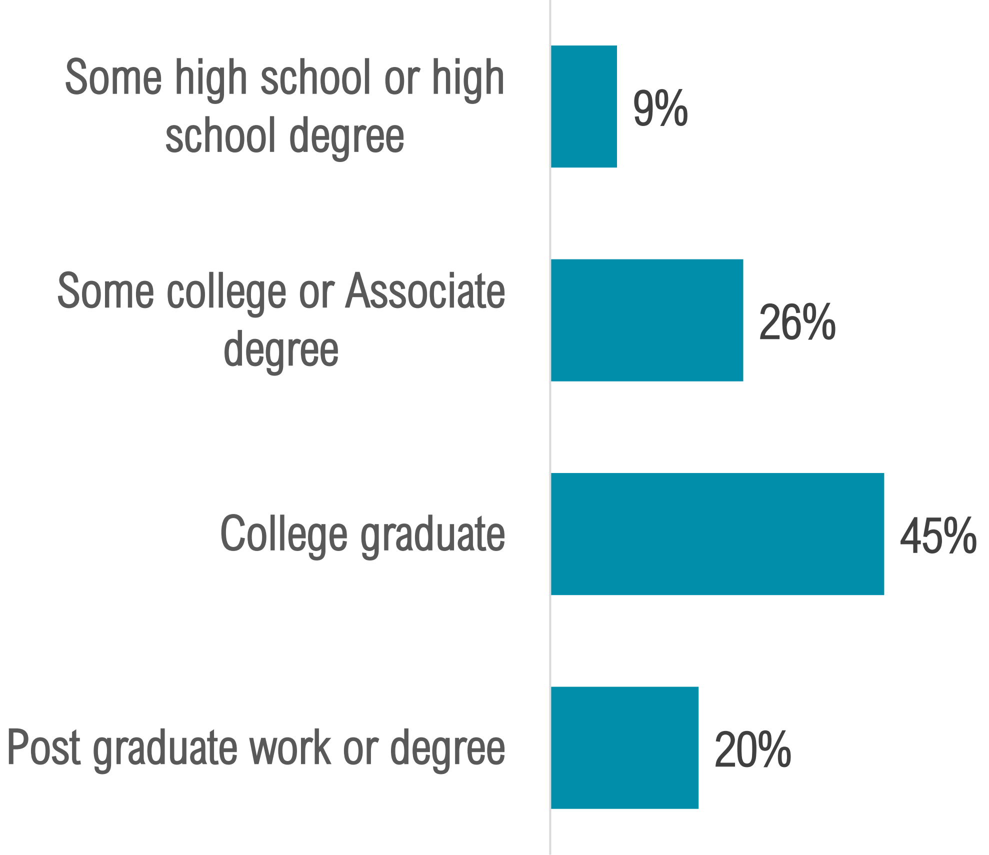
fort MYERS
ISLANDS, BEACHES & NEIGHBORHOODS

downs & st. germain
RESEARCH

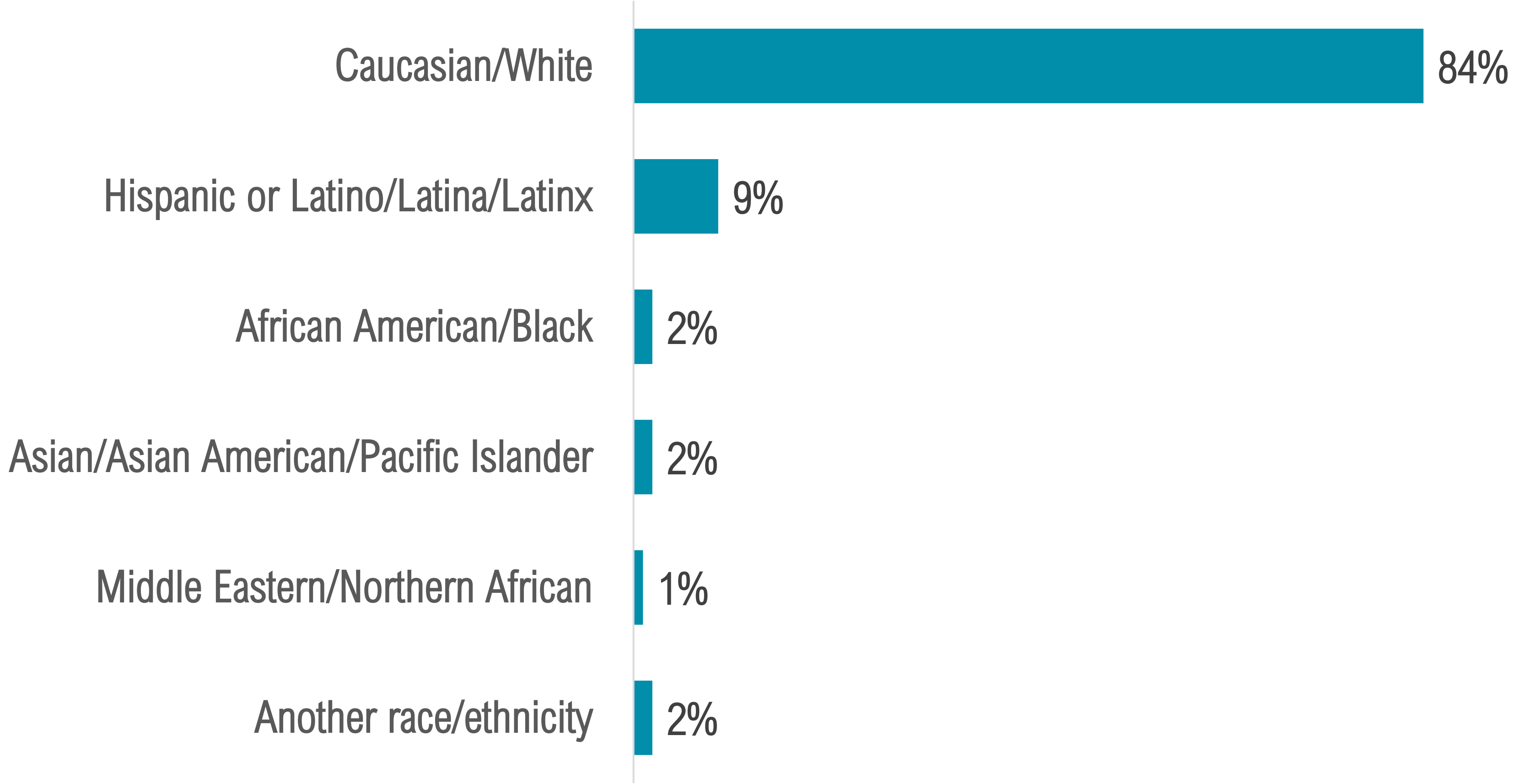
EDUCATION

Education Level

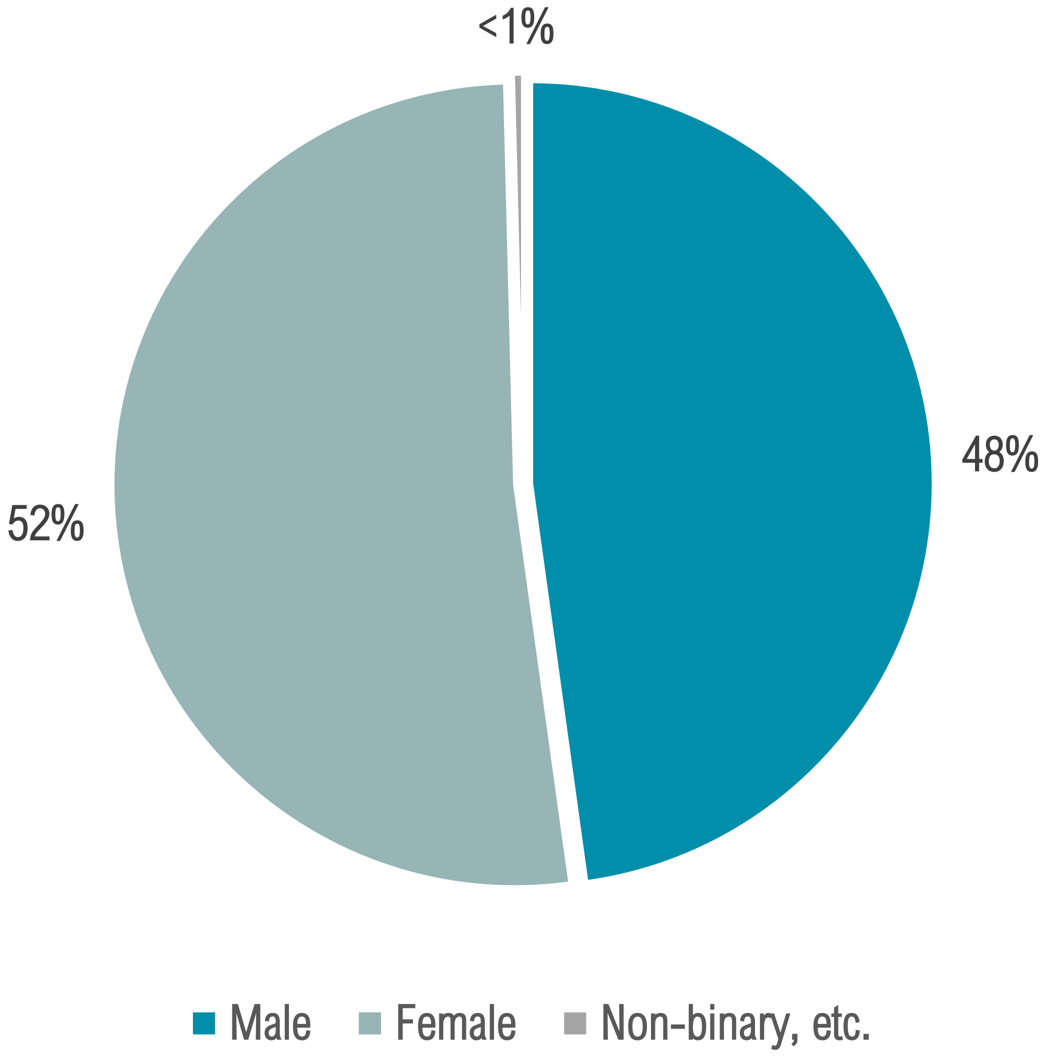
2 in 3 of Jan - Mar visitors had achieved a bachelor's degree or higher.



RACE/ETHNICITY



GENDER[1]

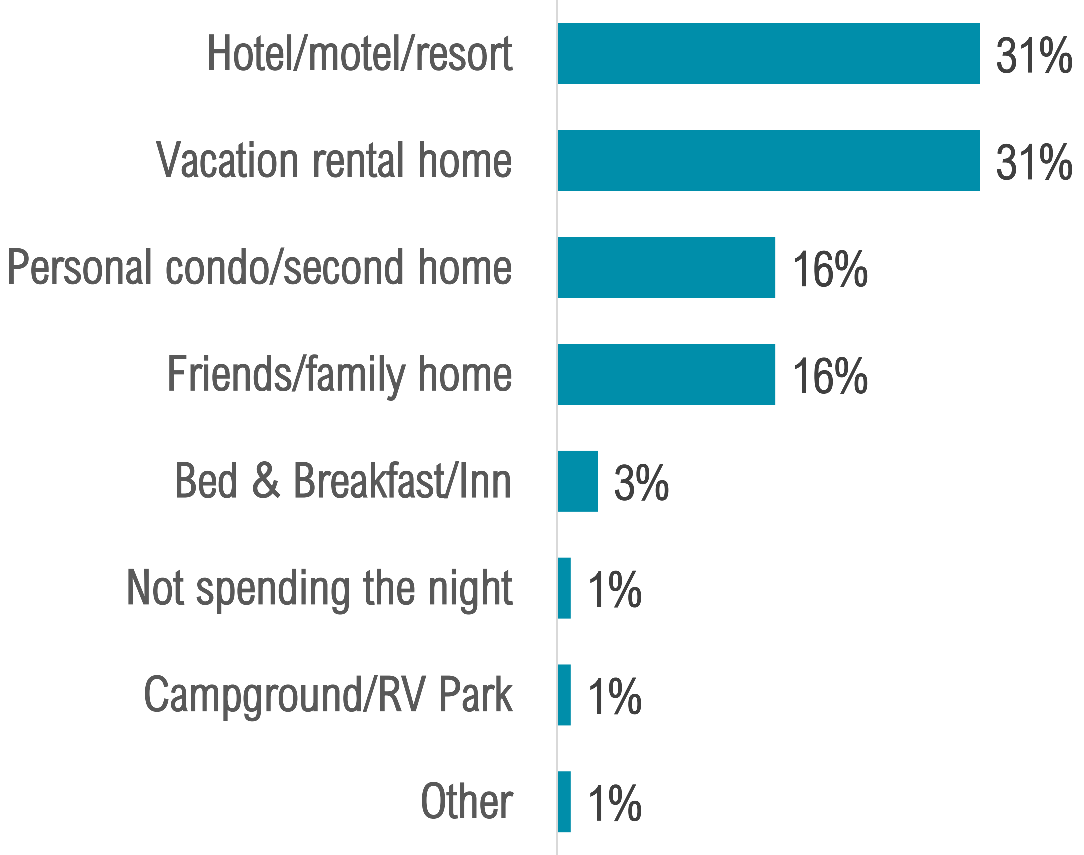


[1]Gender of person interviewed.

VISITOR JOURNEY: TRIP EXPERIENCE

ACCOMMODATIONS

2 in 3 visitors stayed in paid accommodations



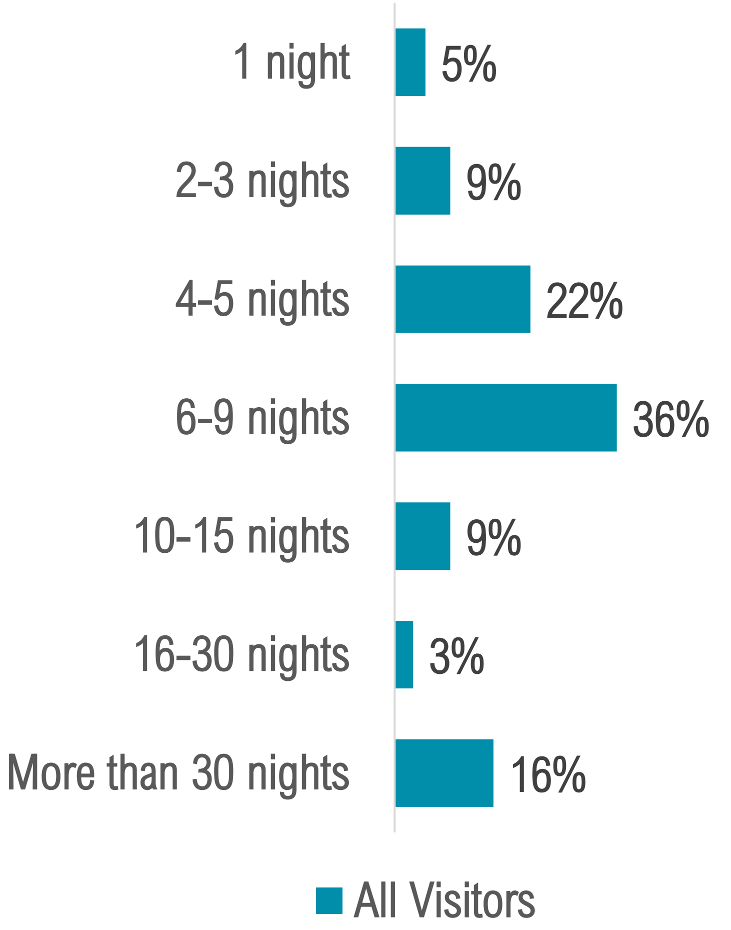
NIGHTS STAYED

All Visitors

Visitors spent an average of 7.1[1] nights in the Fort Myers area.

Visitors Staying in Paid Accommodations

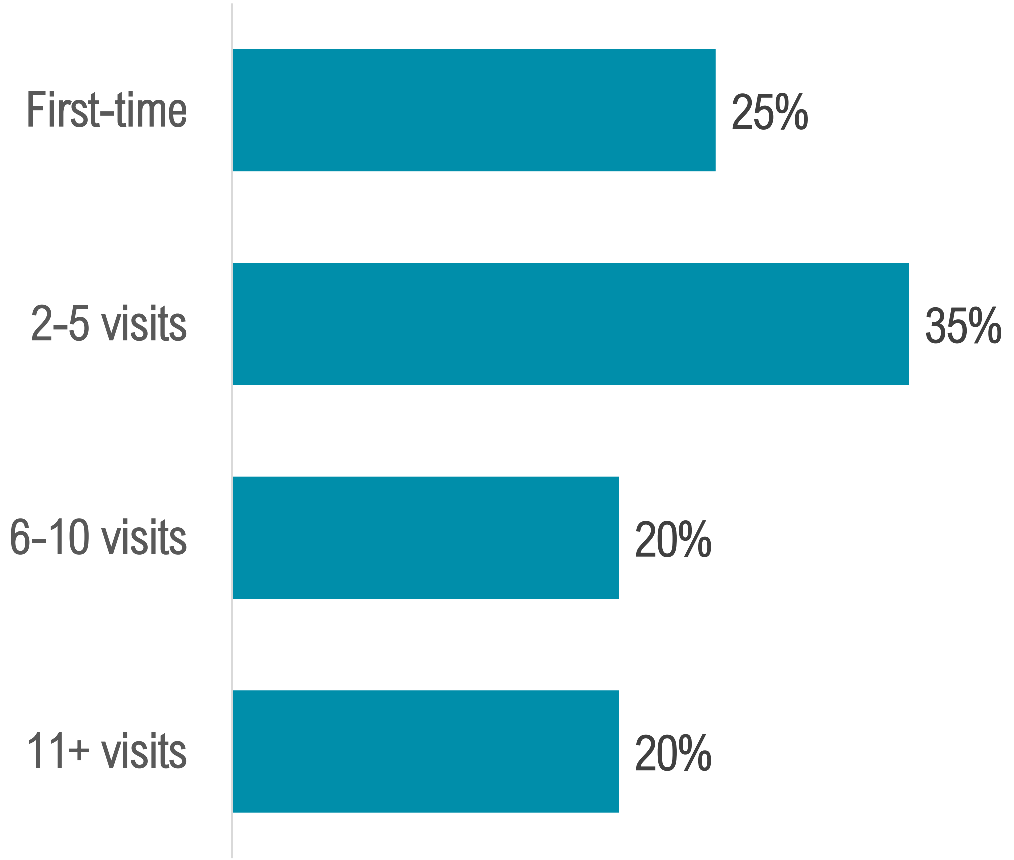
Visitors staying in paid accommodations spent an average of 6.7[2] nights in the Fort Myers area.



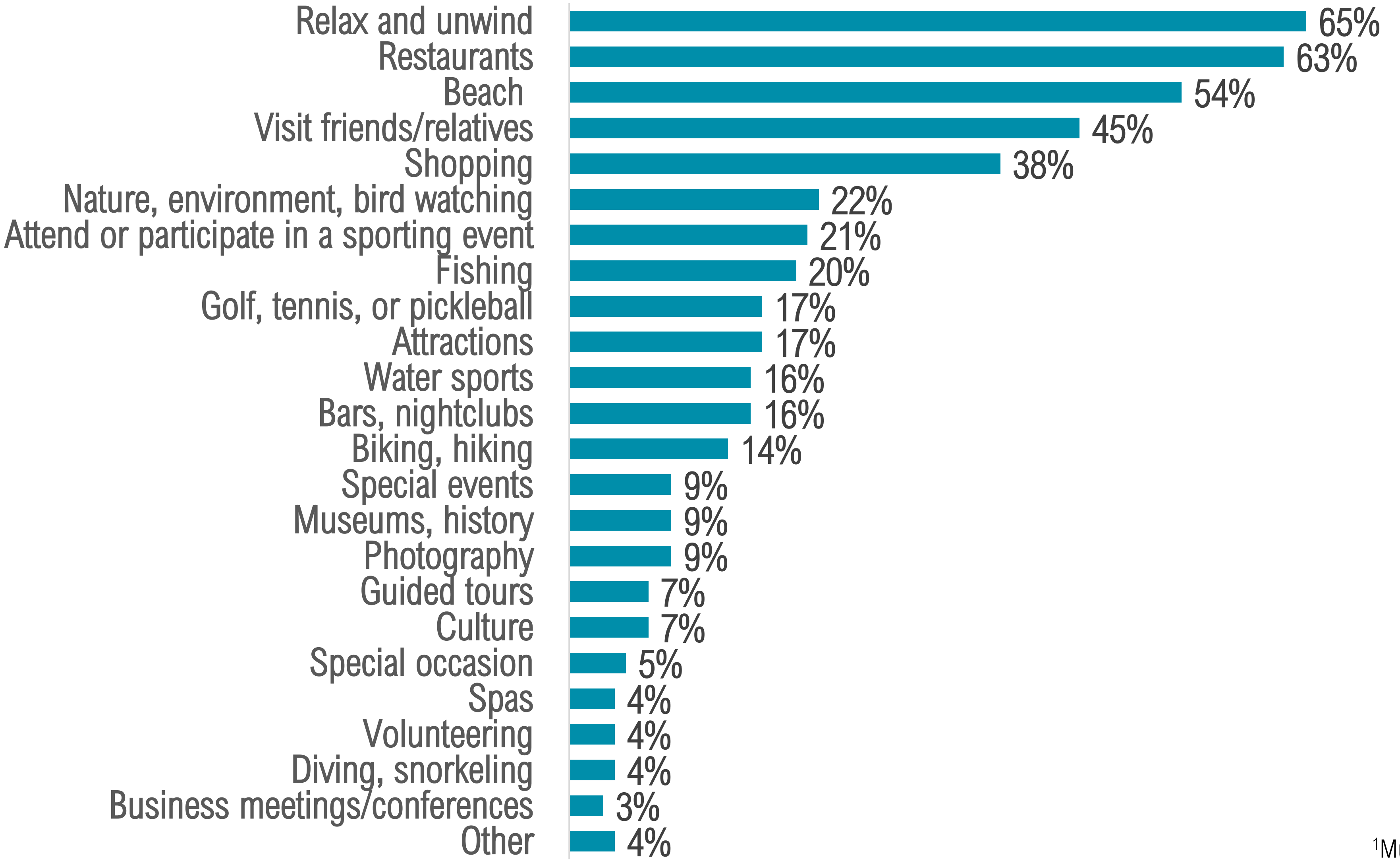
[1]Sources: Occupancy Study and Visitor Tracking Study
[2]Source: Occupancy Study

FIRST TIME AND EXPERIENCED VISITORS

1 in 4 visitors were visiting for the first time, while 1 in 5 were highly loyal visitors, having visited more than 10 times.



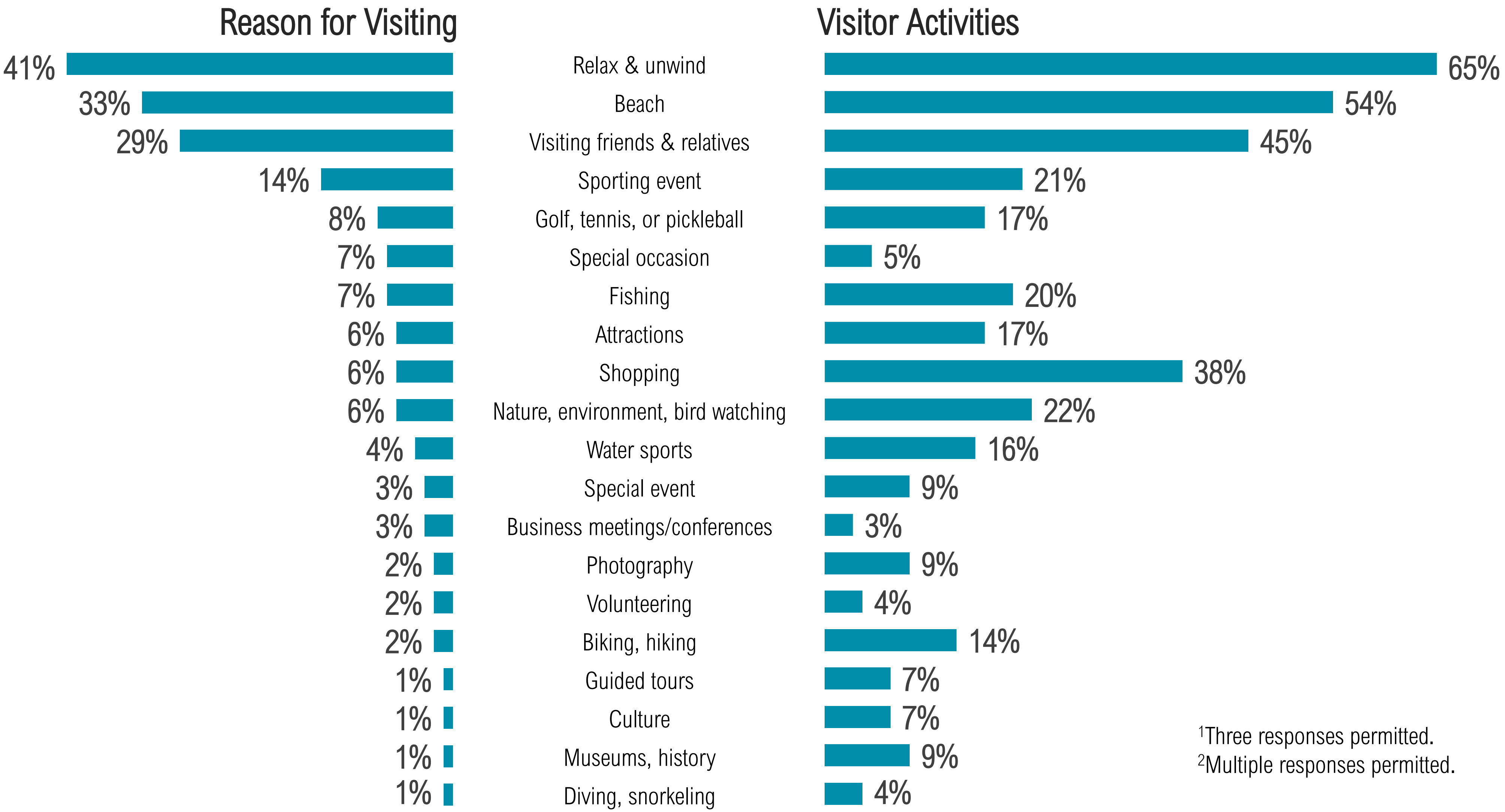
VISITOR ACTIVITIES[1]



Trip Experience
Jan - Mar 2024

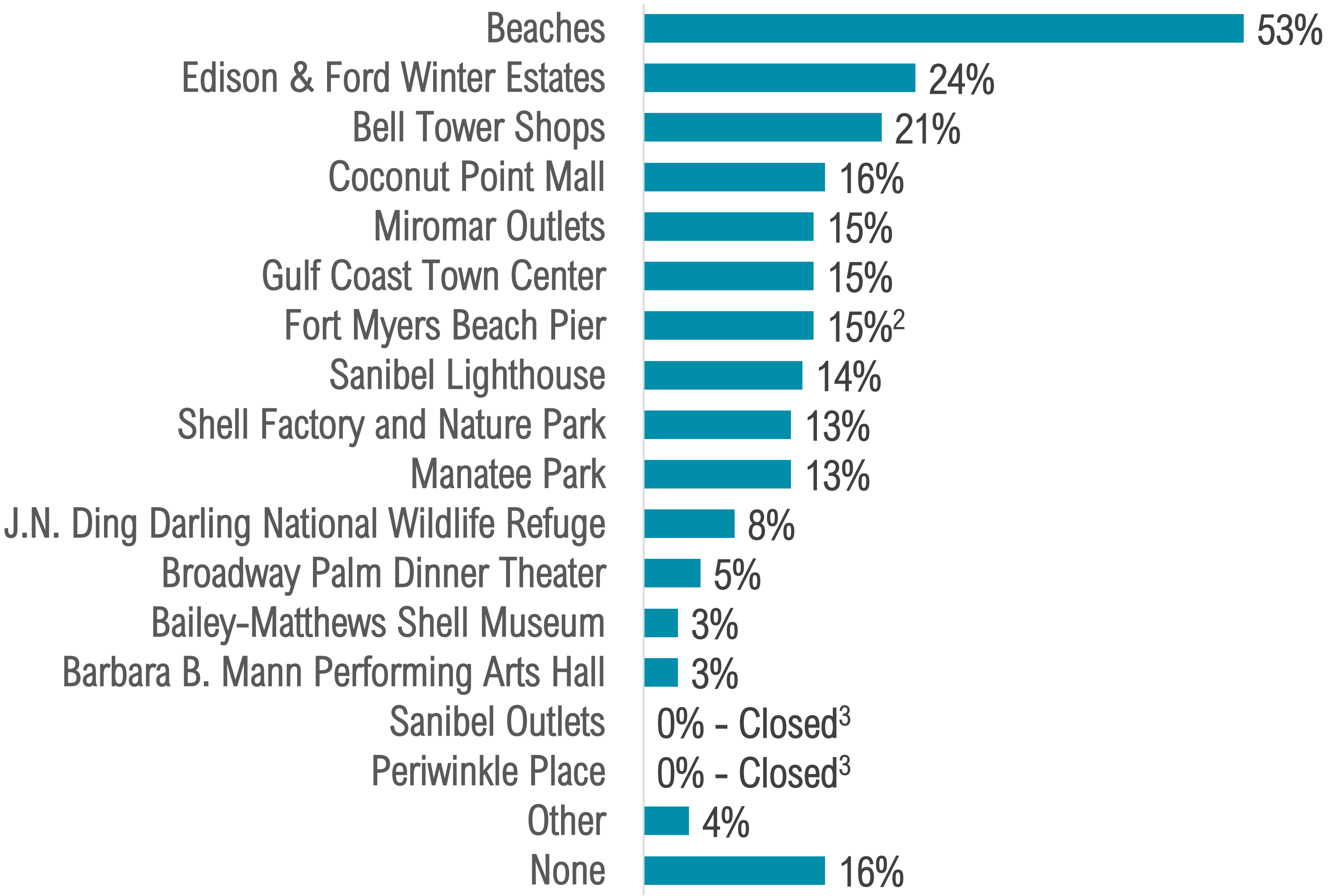
[1]Multiple responses permitted.

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



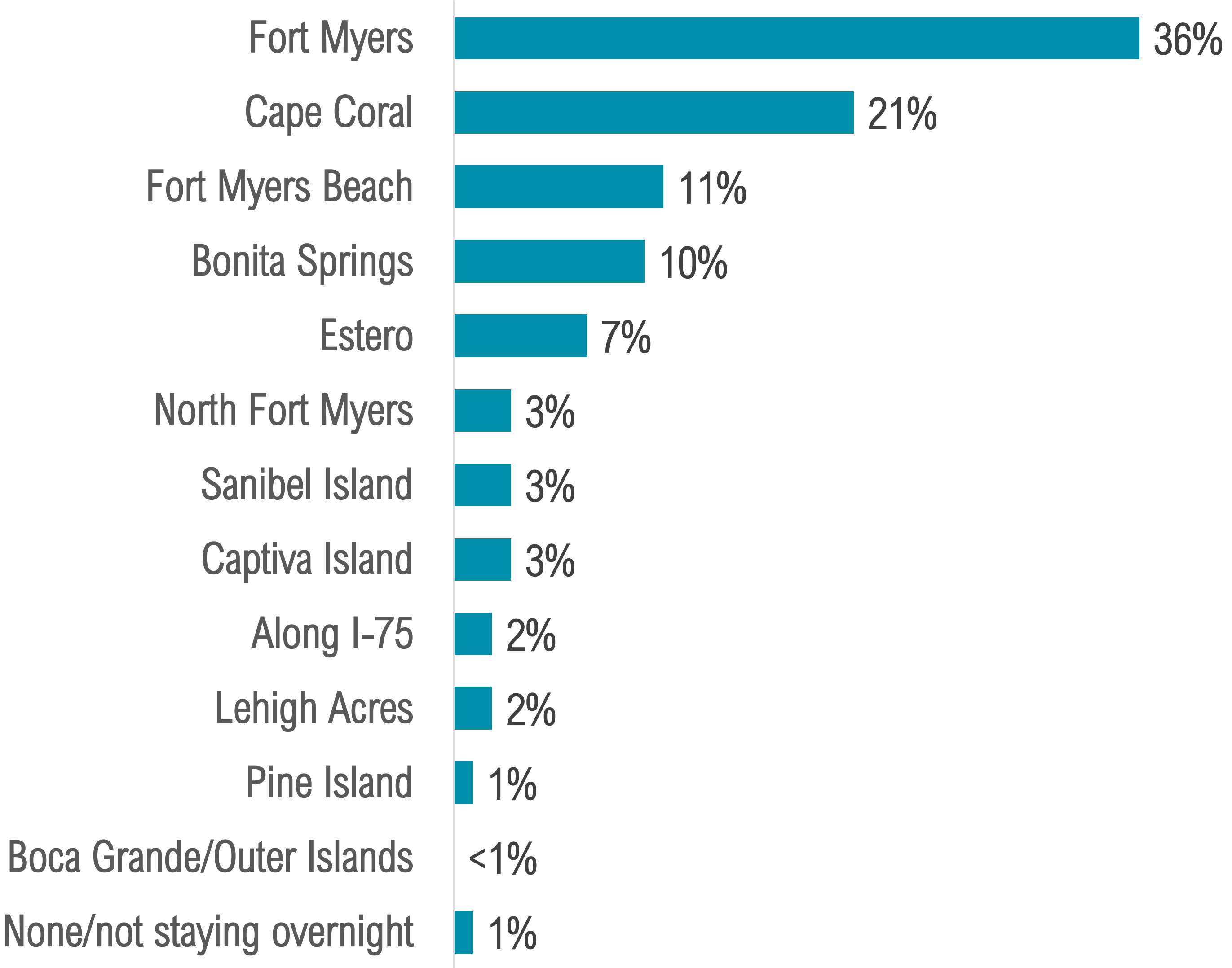
[1]Three responses permitted.
[2]Multiple responses permitted.

ATTRACTIONS VISITED[1]



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

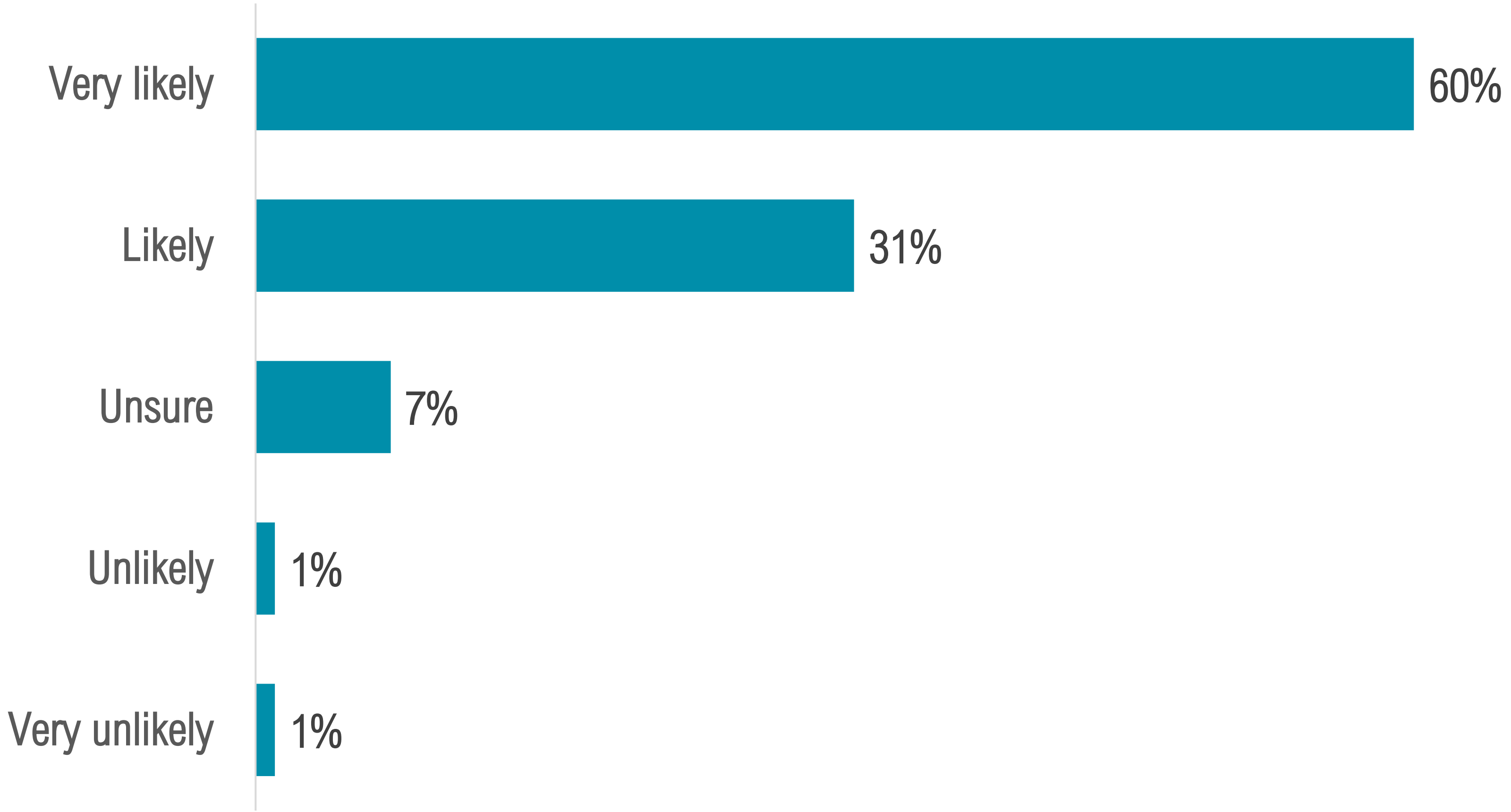
COMMUNITY STAYED



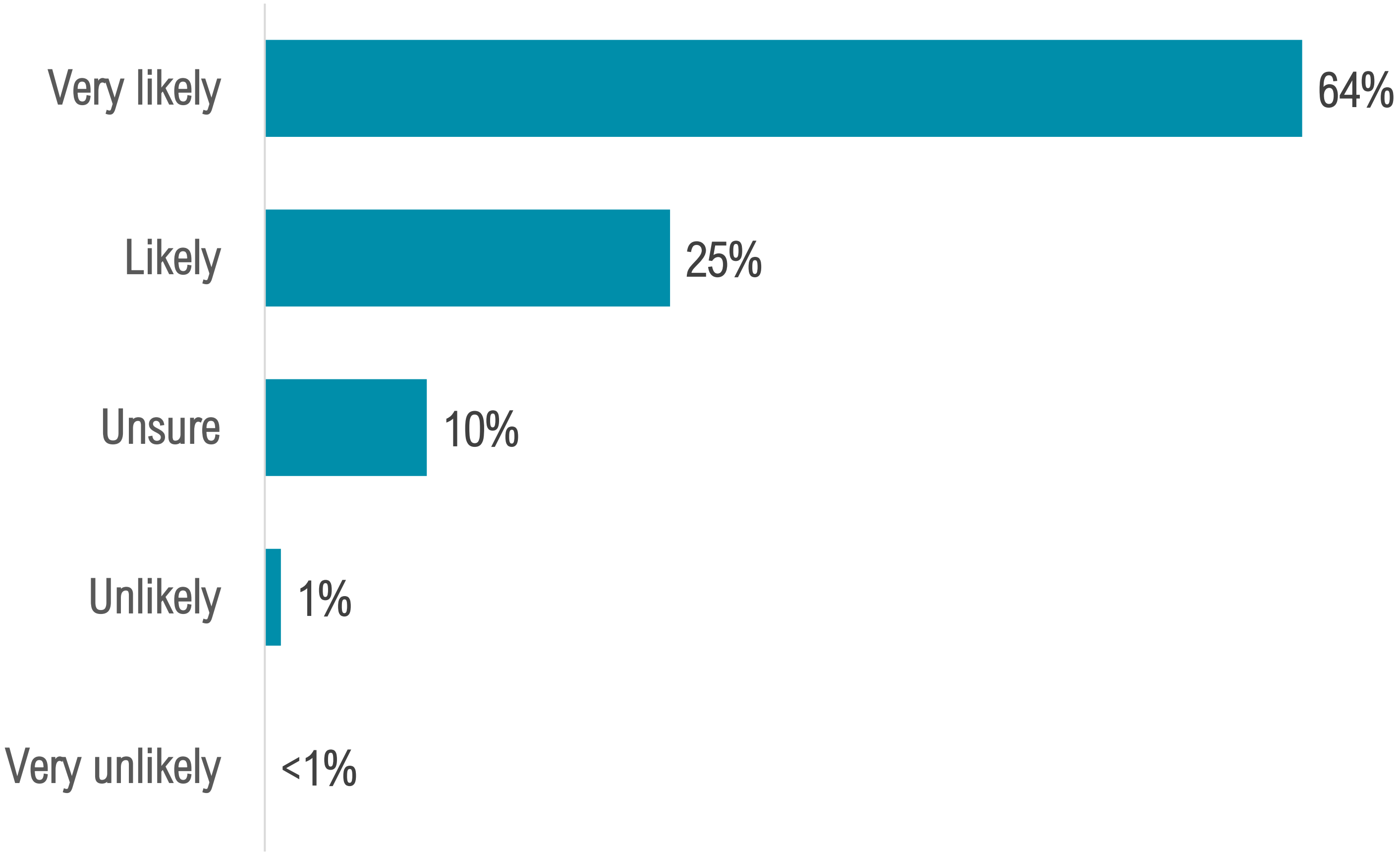
VISITOR JOURNEY: POST-TRIP EVALUATION

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

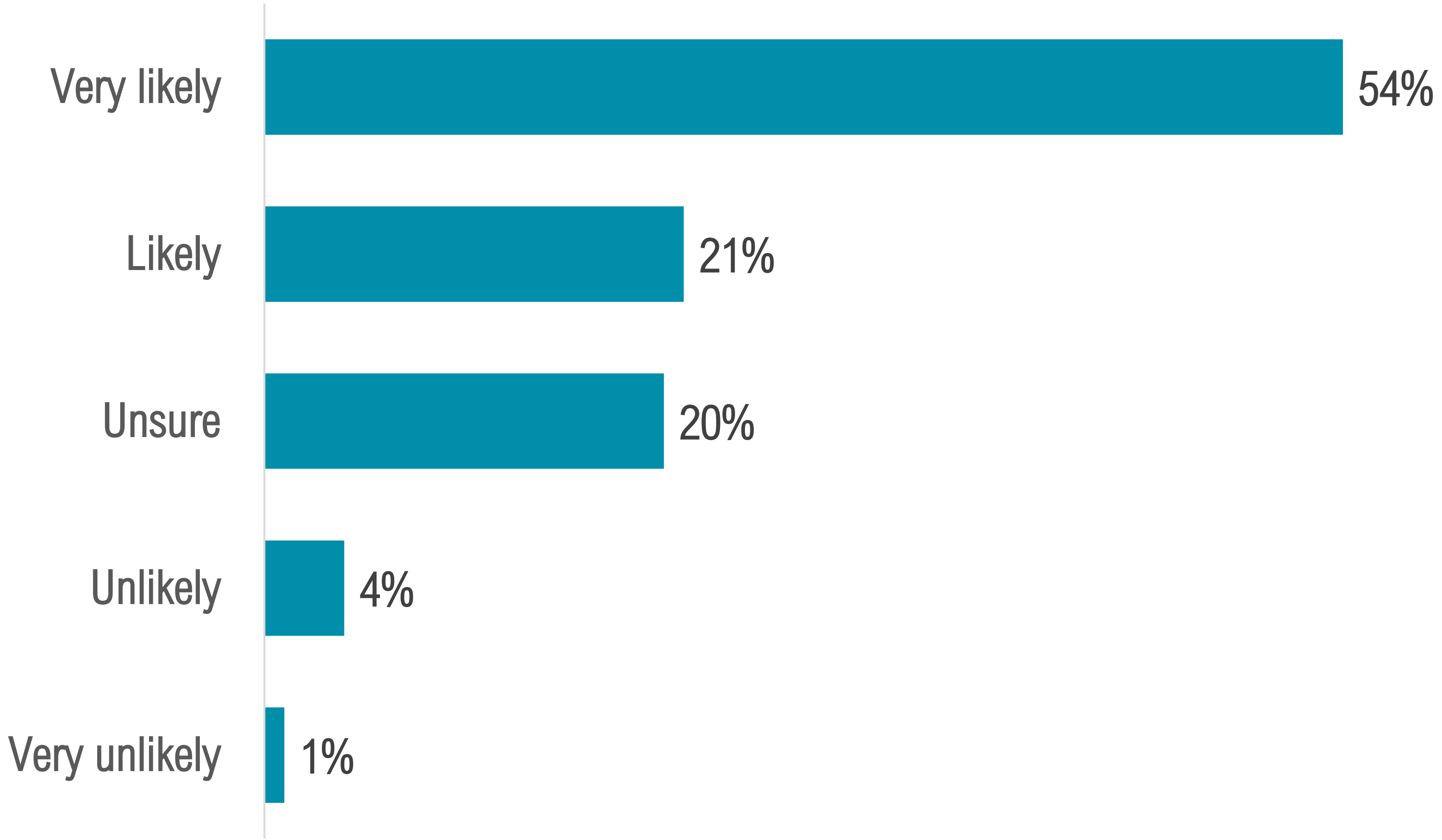
LIKELIHOOD OF RECOMMENDING THE AREA



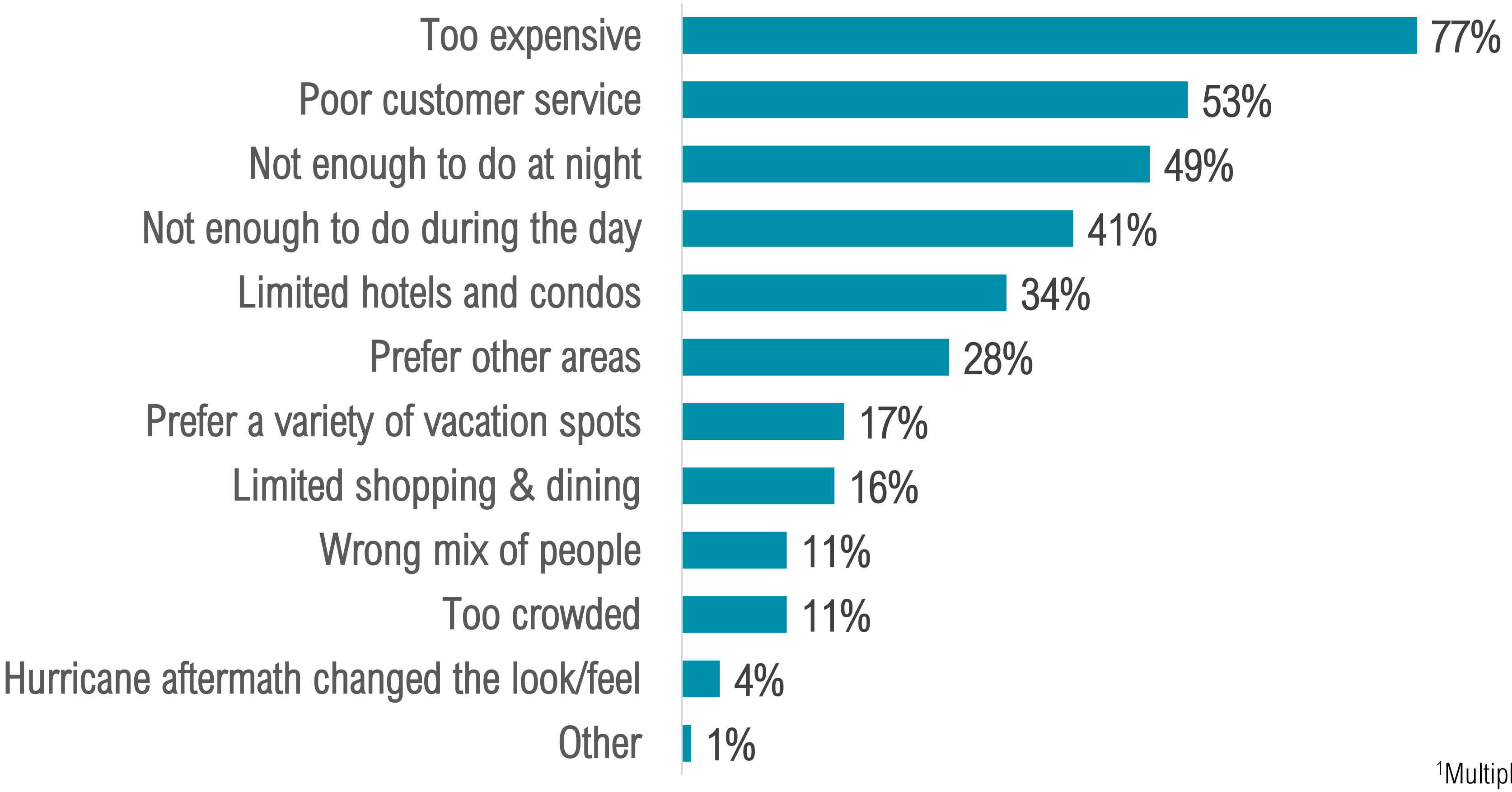
LIKELIHOOD OF RETURNING TO THE AREA



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.

CROSSTABULATIONS: LIKELIHOOD OF RECOMMENDING[1]

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2023	2024	2023	2024	2023	2024	2023	2024
Very Likely	40%	52%	50%	63%	46%	60%	55%	64%
Likely	41%	31%	43%	31%	44%	31%	36%	29%
Unsure/don't know	14%	11%	5%	4%	8%	6%	6%	5%
Unlikely	4%	4%	1%	1%	1%	2%	3%	2%
Very Unlikely	1%	2%	<1%	1%	<1%	1%	<1%	<1%

CROSSTABULATIONS: LIKELIHOOD OF RETURNING[1]

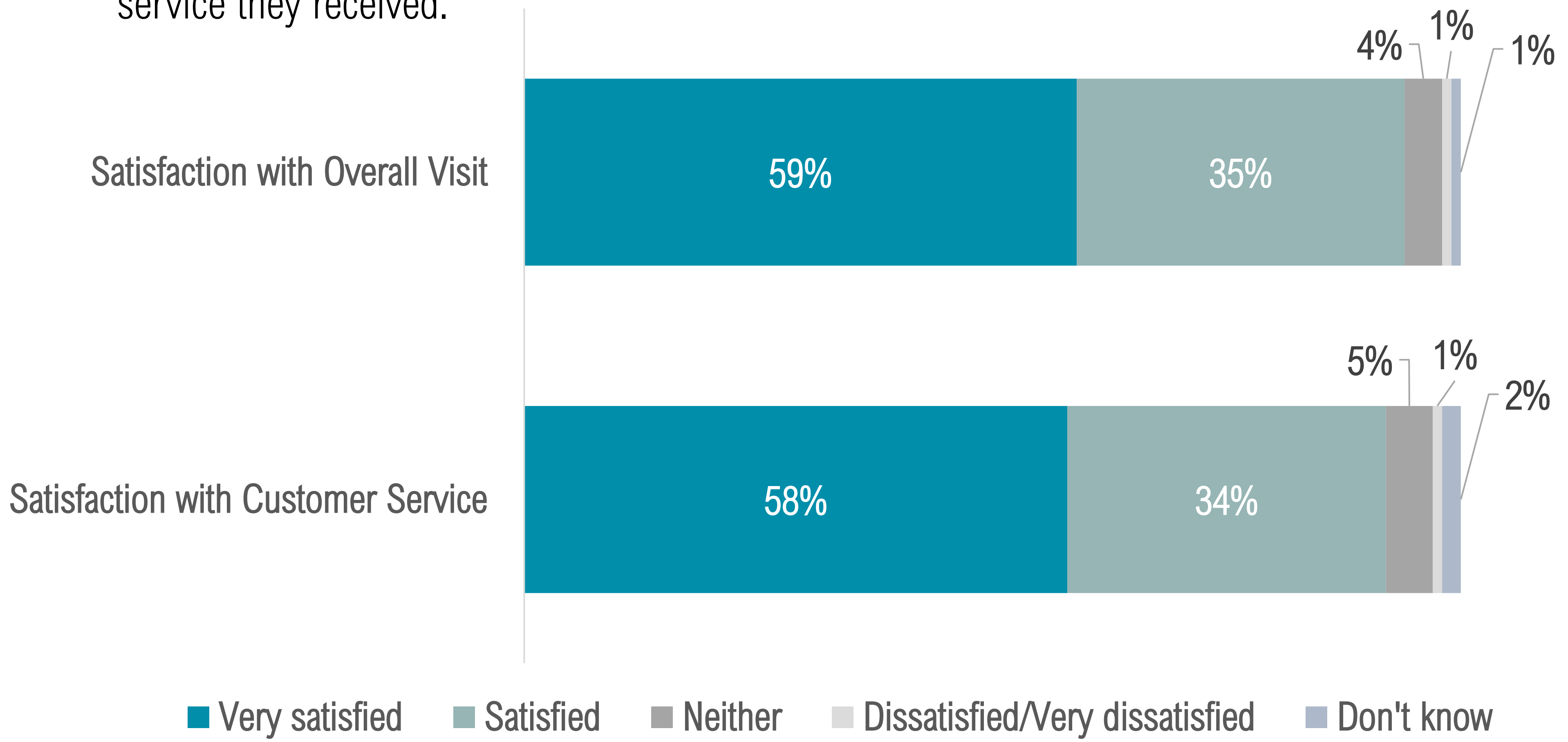
	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2023	2024	2023	2024	2023	2024	2023	2024
Very Likely	38%	51%	58%	69%	63%	66%	50%	66%
Likely	33%	24%	34%	25%	24%	23%	36%	20%
Unsure/don't know	22%	17%	7%	5%	9%	8%	12%	11%
Unlikely	6%	7%	<1%	1%	2%	3%	2%	3%
Very Unlikely	1%	1%	<1%	<1%	1%	<1%	<1%	<1%

CROSSTABULATIONS: LIKELIHOOD OF RETURNING NEXT YEAR[1]

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2023	2024	2023	2024	2023	2024	2023	2024
Very Likely	32%	38%	51%	59%	59%	57%	44%	54%
Likely	27%	24%	27%	19%	20%	19%	29%	17%
Unsure/don't know	34%	22%	19%	14%	19%	15%	23%	16%
Unlikely	6%	13%	1%	7%	2%	8%	2%	10%
Very Unlikely	1%	3%	1%	1%	<1%	1%	1%	3%

SATISFACTION

- Compared to 2023, visitors were **more** likely to be **very satisfied** with their overall visit or the customer service they received.



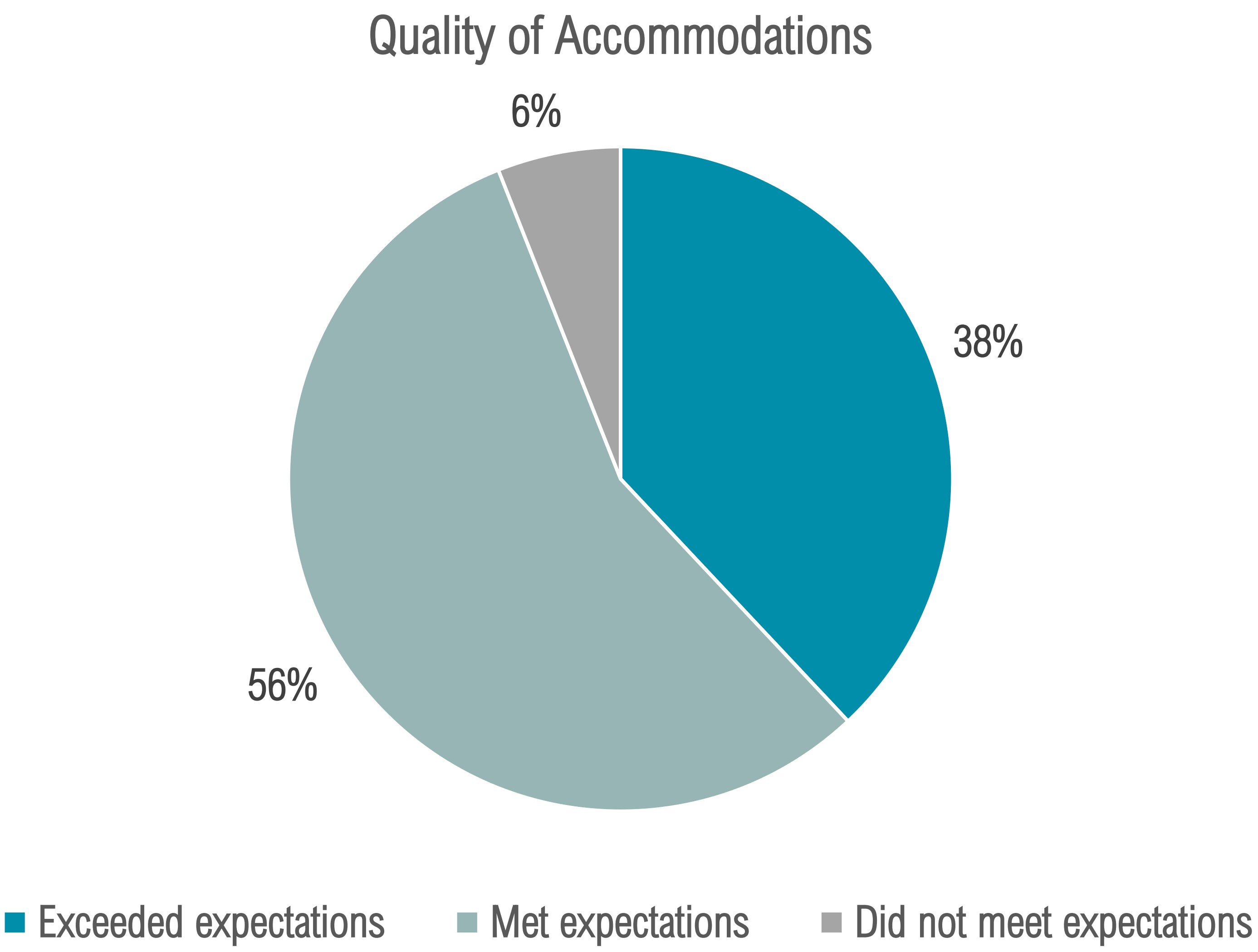
CROSSTABULATIONS: SATISFACTION WITH OVERALL VISIT

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2023	2024	2023	2024	2023	2024	2023	2024
Very Satisfied	36%	47%	52%	62%	47%	57%	65%	62%
Satisfied	44%	41%	41%	35%	43%	37%	26%	29%
Unsure/don't know	13%	9%	7%	3%	9%	5%	7%	6%
Dissatisfied	6%	3%	0%	0%	1%	1%	2%	2%
Very Dissatisfied	1%	1%	0%	1%	0%	0%	0%	2%

CROSSTABULATIONS: SATISFACTION WITH SERVICE

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2023	2024	2023	2024	2023	2024	2023	2024
Very Satisfied	32%	49%	49%	61%	45%	57%	56%	63%
Satisfied	43%	38%	43%	33%	44%	35%	32%	29%
Unsure/don't know	19%	10%	7%	5%	10%	6%	10%	6%
Dissatisfied	4%	2%	1%	1%	1%	1%	2%	2%
Very Dissatisfied	2%	1%	0%	0%	0%	0%	0%	0%

SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

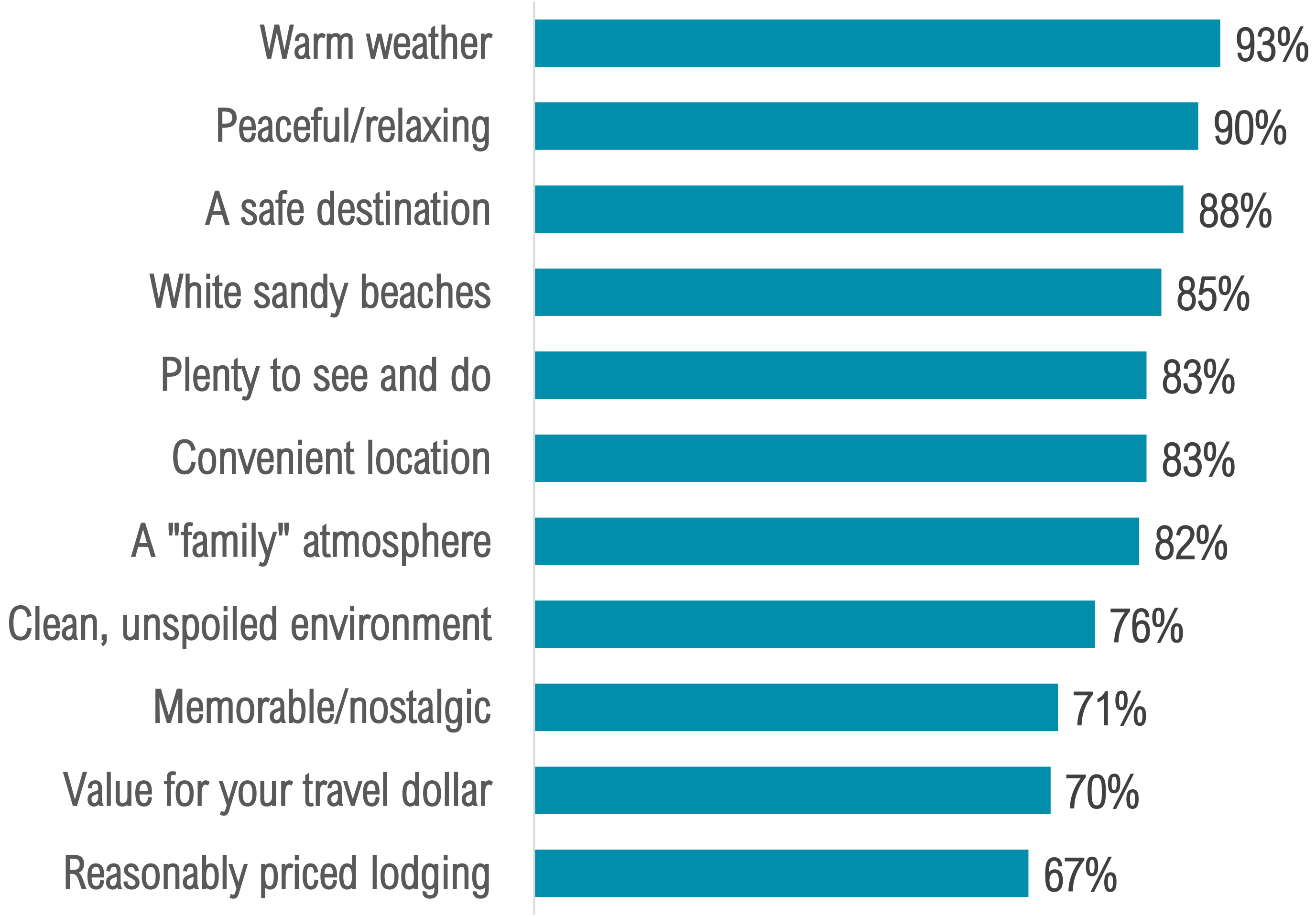


SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

	1st Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2023	2024	2023	2024	2023	2024	2023	2024
Exceeded Expectations	28%	37%	33%	40%	29%	38%	31%	47%
Met Expectations	53%	54%	62%	55%	52%	54%	60%	47%
Did Not Meet Expectations	19%	8%	5%	5%	19%	8%	9%	5%

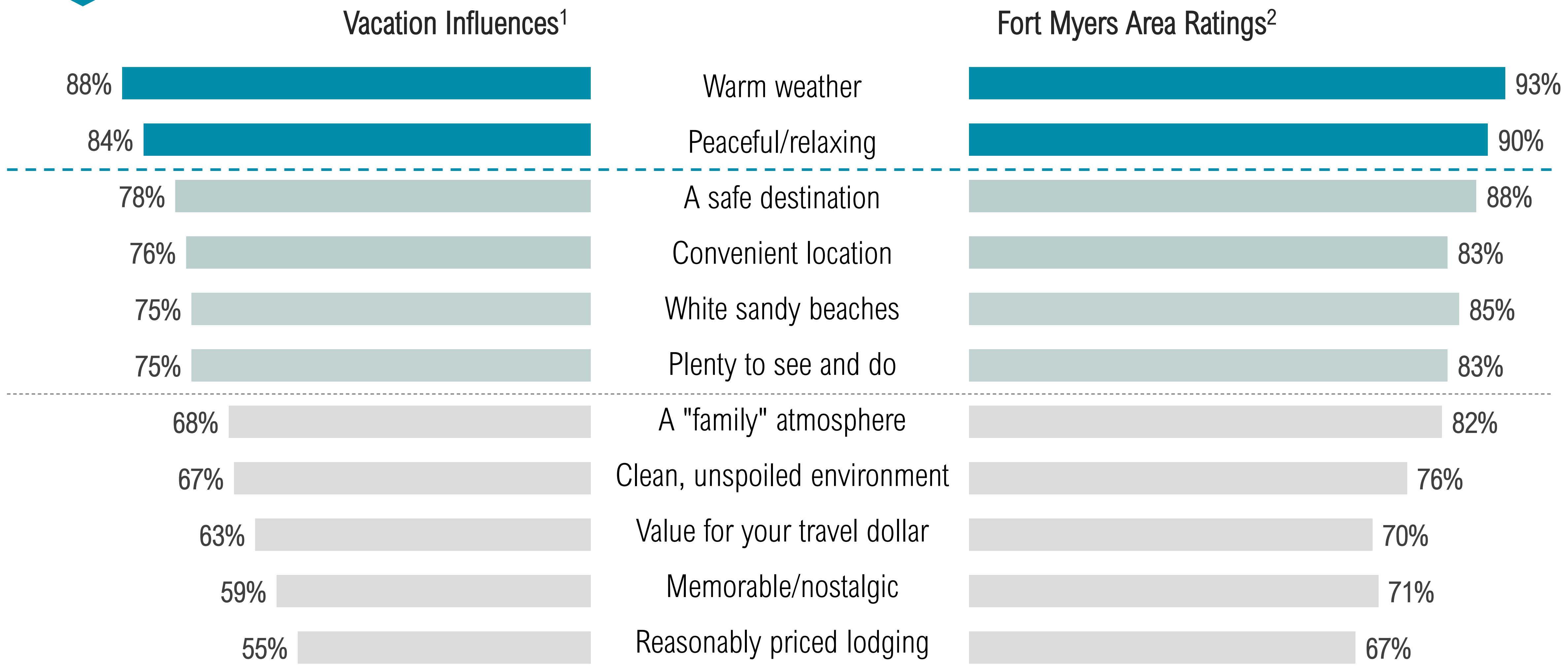
ATTRIBUTE RATINGS[1]

At least **90%** of visitors gave high attribute ratings for **weather** & **peacefulness** 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.

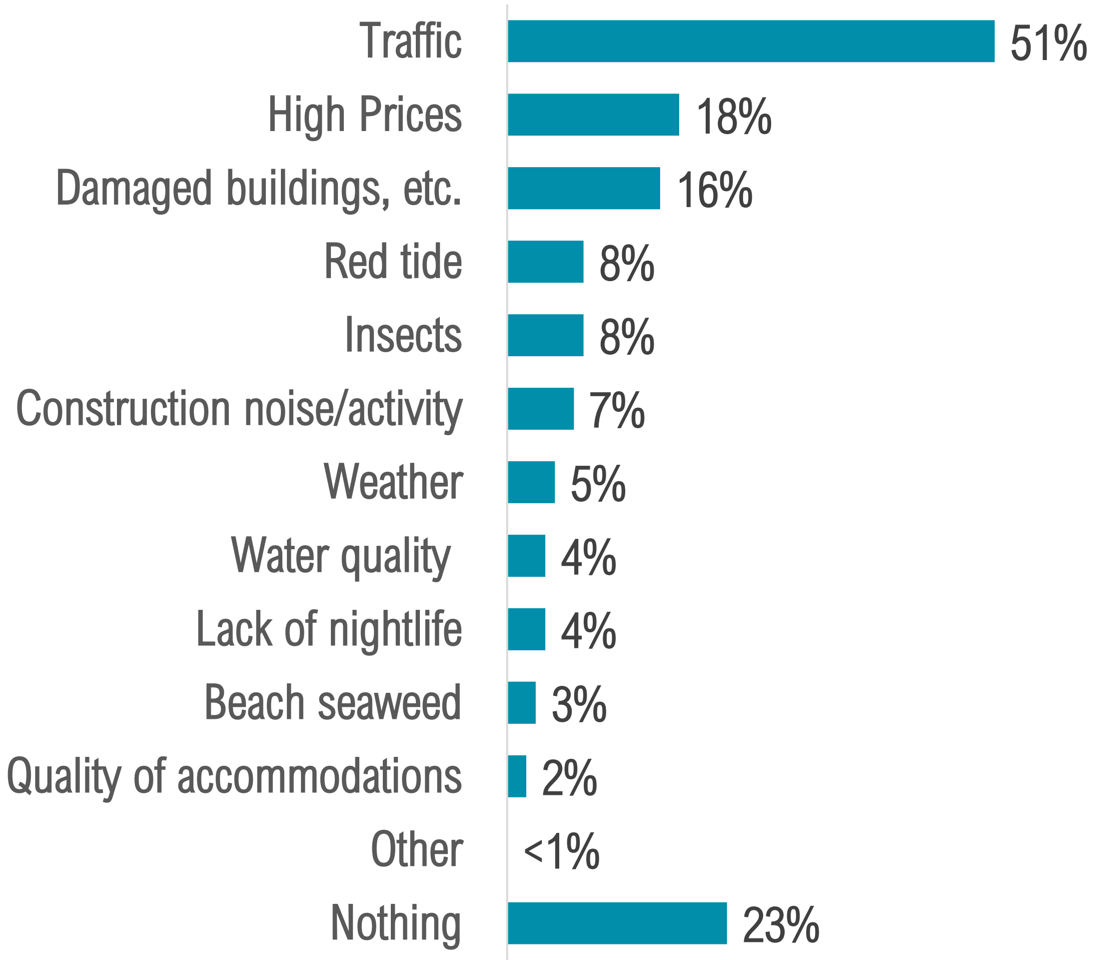
Post-Trip Evaluation
Jan - Mar 2024

fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

downs & st. germain RESEARCH

LEAST LIKED FEATURES[1]

Over **half** of visitors mentioned **traffic,** while under **1 in 5** were concerned with **hurricane damage**, and another **23%** 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

Warm Weather

- “It’s so much different than where we’re from! The weather, the air, the trees, the people, the beaches, it just all makes for such a perfect vacation.”
- “Always a great time to be had in a beautiful environment with a tropical landscape. It’s got white sandy beaches, warm weather, and gorgeous sunsets on the Gulf.”
- “We had a wonderful time going on some guided tours to learn the history of the area and the culture. Beautiful place with great weather!”

Peaceful & Relaxing

- “Wonderful time in a gorgeous environment with plenty of sunshine and a very relaxing atmosphere.”
- “We had a great time in our favorite place. It has perfect weather, sunshine, beautiful sunsets, great golf courses, and amazing weather.”
- “You have just got to visit the Fort Myers area. It is so beautiful and peaceful.”

AREA DESCRIPTIONS

A Safe Destination

- “Great place for retired people to vacation and make new memories. It’s a beautiful and safe town, great for a warm getaway with friends or family.”
- “A slow-paced and laid-back area to bring your family. It’s a clean and safe place to vacation.”
- “The area is safe and serene, with beautiful beaches and a welcoming community.”

White Sandy Beaches

- “Sanibel still has some of the best beaches you’ll ever find, especially if you like to look for shells!”
- “Such a gorgeous coastline filled with a variety of white sugar sand type beaches.”
- “We come here every year for Boston Red Sox spring training and also spend tons of time the beautiful beaches all over the area.”

OCCUPANCY BAROMETER[1]: APR – JUN RESERVATIONS

Apr – Jun Reservations	Apr – Jun 2023	Apr – Jun 2024
Up	29%	34%
Same	13%	21%
Down	58%	45%

[1]Sources: Occupancy Survey
Accommodations partners were asked the following, "Please think about your reservations for the next three months. Compared to April through June of 2023, would you say the total level of reservations are up, the same, or down?"

OCCUPANCY BAROMETER[1]: JUL - SEP RESERVATIONS

Jul – Sep Reservations	Jul – Sep 2023	Jul – Sep 2024
Up	32%	34%
Same	11%	20%
Down	57%	46%

[1]Sources: Occupancy Survey
Accommodations partners were asked the following, "Please think about your reservations for the next three months. Compared to July through September 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[1]	Jan - Mar 2023[4]	Jan - Mar 2024	% Change '23 – '24
Visitors	666,900	828,300	+ 24.2%
Visitor Days	5,123,900	5,880,900	+ 14.8%
Room Nights	1,081,000	1,411,300	+ 30.6%
Direct Expenditures[2]	$825,397,800	$1,047,587,600	+ 26.9%
Total Economic Impact[3]	$1,321,461,900	$1,668,807,000	+ 26.3%
Occupancy	69.0%	74.0%	+ 7.3%
ADR	$218.31	$224.56	+ 2.9%
RevPAR	$150.55	$166.13	+ 10.4%

[1] Significantly more units were available in Jan-Mar 2024 compared to Jan-Mar 2023. This is due to the ongoing recovery process post-Hurricane Ian.
[2] Includes: accommodations, restaurants, entertainment, shopping, transportation, groceries, and "other" expenses.
[3] Economic impact includes indirect and induced effects of visitor spending. Indirect effects are increased business spending resulting from tourism dollars. Induced effects are increased household spending resulting from tourism dollars.
[4] 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.

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM[1]

	Jan - Mar 2023	Jan - Mar 2024	% Change '23 – '24
Direct Jobs[2]	8,990	10,630	+ 18.2%
Total Jobs[3]	11,980	14,190	+ 18.4%
Direct Wages[2]	$328,014,400	$407,091,500	+ 24.1%
Total Wages[3]	$477,880,000	$584,221,100	+ 22.3%
Direct Local Taxes[2]	$36,135,500	$46,995,500	+ 30.1%
Total Local Taxes[3]	$49,991,900	$62,036,100	+ 24.1%
Direct State Taxes[2]	$31,539,000	$47,931,600	+ 52.0%
Total State Taxes[3]	$43,833,600	$63,618,200	+ 45.1%

[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	Jan - Mar 2023	Jan - Mar 2024
Visitors in Paid Accommodations	64%	67%
Visitors in Non-Paid Accommodations	35%	32%
Day Trippers	1%	1%

PRE-VISIT

Planned trip in advance	Jan - Mar 2023	Jan - Mar 2024
1 week or less	9%	6%
2-4 weeks	15%	11%
1-2 months	34%	31%
3-6 months	24%	32%
6 months or more	16%	19%
Not sure	2%	1%

Considered Other Destinations	Jan - Mar 2023	Jan - Mar 2024
Yes	42%	36%
No	58%	64%

PRE-VISIT

Other destinations considered[1]	Jan - Mar 2023[2]	Jan - Mar 2024[2]
Tampa/Clearwater/St. Pete	22%	21%
Sarasota/Siesta Key	13%	17%
Miami/Ft. Lauderdale	14%	17%
Naples/Marco Island	10%	15%
Keys/Key West	9%	12%
Orlando	15%	8%
West Palm Beach	6%	7%
Daytona Beach	10%	6%
Punta Gorda/Englewood	5%	5%
Other destinations in FL	8%	15%
Other destinations outside of FL	20%	23%

[1]Multiple responses permitted.
[2]Base: 36% of visitors who considered other destinations.

PRE-VISIT

Trip Planning Websites/Apps[1]	Jan - Mar 2023	Jan - Mar 2024
Airline websites/apps	27%	29%
Online search engines	29%	25%
Airbnb, Vrbo, etc.	18%	22%
Hotel websites/apps	12%	15%
Booking websites	7%	13%
Vacation rental websites/apps	11%	12%
Trip Advisor	12%	11%
Traveler reviews, blogs, stories	15%	9%
www.VisitFortMyers.com	6%	8%
Facebook	7%	7%
VCB Social Media	7%	6%
Visit Florida	7%	5%
Instagram	3%	4%
YouTube, Hulu, Pandora	4%	3%
Other	4%	4%
None	28%	25%

[1]Multiple responses permitted.

PRE-VISIT

Information Requests[1]	Jan - Mar 2023	Jan - Mar 2024
Calling a hotel, motel, condo	25%	20%
Requesting and receiving a visitor guide	8%	6%
Receiving the VCB e-newsletter	2%	2%
Calling the VCB	2%	2%
Calling a local Chamber of Commerce	2%	1%
Other	3%	3%
None	69%	75%

[1]Multiple responses permitted.

PRE-VISIT

Recall of Lee County Promotions	Jan - Mar 2023	Jan - Mar 2024
Yes	50%	44%
No	32%	39%
Can't recall	18%	17%
% of recallers influenced by promotions	45%	44%
% of total visitors influenced by promotions	22%	19%

PRE-VISIT

Type of Promotions Recalled[1]	Jan - Mar 2023[2]	Jan - Mar 2024[3]
Internet	43%	44%
Social media	40%	32%
Traveler reviews, blogs	24%	17%
Cable or satellite TV	16%	15%
www.VisitFortMyers.com	6%	10%
Newspaper	6%	10%
Magazine	3%	9%
Travel/visitor guide	8%	8%
Email	7%	7%
Video streaming services	10%	7%
AAA	3%	7%
Billboard/signage	3%	5%
Brochure	2%	5%
Radio	4%	3%
Music streaming services	1%	1%
Deal-based promotion	<1%	1%
Podcast	<1%	1%
Other	2%	3%

[1]Multiple responses permitted.
[2]Base: 50% of visitors who recalled seeing a promotion.
[3]Base: 44% of visitors who recalled seeing a promotion.

PRE-VISIT

Characteristics influencing decision to visit Lee County (top 2 boxes)[1]	Jan - Mar 2023	Jan - Mar 2024
Warm weather	88%	88%
Peaceful/relaxing	85%	84%
A safe destination	80%	78%
Convenient location	73%	76%
White sandy beaches	72%	75%
Plenty to see and do	78%	75%
A "family" atmosphere	72%	68%
Clean, unspoiled environment	69%	67%
Value for your travel dollar	71%	63%
Memorable/nostalgic	67%	59%
Reasonably priced lodging	60%	55%

[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]	Jan - Mar 2023	Jan - Mar 2024
Relax & unwind	33%	41%
Beach	12%	33%
Visiting friends & relatives	28%	29%
Sporting event	16%	14%
Part-time resident ("Snowbird")	11%	13%
Golf or tennis	8%	8%
Checking-in on my property post-hurricane	10%	8%
Special occasion	7%	7%
Fishing	7%	7%
Attractions	3%	6%
Shopping	9%	6%
Nature, environment, bird watching	3%	6%
Water sports	3%	4%
Work-related hurricane recovery	9%	3%
Special event	3%	3%
Business meetings/conferences	4%	3%
Photography	4%	2%
Volunteering	7%	2%
Biking, hiking	1%	2%
Guided tours	1%	1%
Culture	1%	1%
Museums, history	1%	1%
Diving, snorkeling	1%	1%
Other	6%	6%

[1]Multiple responses permitted.

PRE-VISIT

Transportation	Jan - Mar 2023	Jan - Mar 2024
Fly	59%	66%
Drive a personal vehicle	28%	25%
Drive a rental vehicle	10%	7%
Drive a RV	1%	1%
Travel by bus	1%	<1%
Other	2%	1%

Airport Used	Jan - Mar 2023	Jan - Mar 2024
Southwest Florida International	85%	85%
Punta Gorda	8%	7%
Ft. Lauderdale International	2%	2%
Tampa International	2%	2%
Orlando International	1%	1%
Miami International	1%	2%
Other	1%	1%

TRAVEL PARTY PROFILE

Visitor Origin[1]	Jan - Mar 2023	Jan - Mar 2024
Florida	6.6%	4.6%
Southeast	20.8%	16.2%
Northeast	19.4%	22.9%
Midwest	37.5%	42.5%
West	8.3%	5.1%
Canada	4.6%	5.5%
United Kingdom	0.5%	0.9%
Germany	0.6%	0.5%
Other Europe	0.5%	0.6%
Other International	1.2%	1.2%

Visitor Origin[1]	Jan - Mar 2023	Jan - Mar 2024
Minneapolis - Saint Paul	6%	8%
New York	4%	4%
Boston	4%	4%
Detroit	4%	4%
Chicago	4%	3%
Philadelphia	2%	3%
Atlanta	4%	3%

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

TRAVEL PARTY PROFILE

Travel Parties	Jan - Mar 2023	Jan - Mar 2024
Mean travel party size[1]	2.9	2.7
Travel with children under age 18	31%	27%

Travel Party Composition	Jan - Mar 2023	Jan - Mar 2024
As a couple	33%	41%
As a family	35%	34%
By yourself	15%	11%
With other couples/friends	10%	10%
With business associates	6%	2%
In a tour group	1%	1%
Other	<1%	1%

[1]Sources: Occupancy Study and Visitor Tracking Study

TRAVEL PARTY PROFILE

Marital Status	Jan - Mar 2023	Jan - Mar 2024
Married/Domestic Partnership	73%	76%
Single	27%	24%

Age	Jan - Mar 2023	Jan - Mar 2024
Average age	50	53
Median age	50	53

Household Income	Jan - Mar 2023	Jan - Mar 2024
Median Income	$111,500	$105,700

TRAVEL PARTY PROFILE

Race/Ethnicity	Jan - Mar 2023	Jan - Mar 2024
Caucasian/White	77%	84%
Hispanic/Latino/Latina/Latinx	14%	9%
Asian/Asian American/Pacific Islander	2%	2%
African American/Black	4%	2%
Middle Eastern/Northern African	1%	1%
Another race/ethnicity	2%	2%

Gender[1]	Jan - Mar 2023	Jan - Mar 2024
Female	42%	52%
Male	57%	48%
Non-binary	<1%	<1%

[1]Of person interviewed.

TRIP EXPERIENCE

Length of Stay[1]	Jan - Mar 2023	Jan - Mar 2024
Average nights in the Fort Myers area	7.7	7.1

First Time/Repeat Visitors	Jan - Mar 2023	Jan - Mar 2024
First-time	25%	25%
Repeat	75%	75%

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

TRIP EXPERIENCE

Type of Accommodations	Jan - Mar 2023	Jan - Mar 2024
Not spending the night	1%	1%
Hotel/motel/resort	37%	31%
Vacation rental home	20%	31%
Personal condo/second home	17%	16%
Friends/family home	18%	16%
Bed & Breakfast/Inn	4%	3%
Campground/RV Park	2%	1%
Other	1%	1%

TRIP EXPERIENCE

Activities[1]	Jan - Mar 2023	Jan - Mar 2024
Relax and unwind	62%	65%
Restaurants	65%	63%
Beach	34%	54%
Visit friends/relatives	43%	45%
Shopping	38%	38%
Nature, environment, bird watching	15%	22%
Attend or participate in a sporting event	19%	21%
Fishing	20%	20%
Golf, tennis, or pickleball	17%	17%
Attractions	7%	17%
Water sports	8%	16%
Bars, nightclubs	15%	16%
Biking, hiking	10%	14%
Special events	9%	9%
Museums, history	5%	9%
Photography	10%	9%
Guided tours	4%	7%
Culture	5%	7%
Special occasion	7%	5%
Spas	3%	4%
Volunteering	10%	4%
Diving, snorkeling	4%	4%
Business meetings/conferences	4%	3%
Other	6%	4%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Attractions[1]	Jan - Mar 2023	Jan - Mar 2024
Beaches	34%	53%
Edison & Ford Winter Estates	21%	24%
Bell Tower Shops	27%	21%
Coconut Point Mall	18%	16%
Miromar Outlets	21%	15%
Gulf Coast Town Center	22%	15%
Fort Myers Beach Pier[2]	9%	15%
Sanibel Lighthouse[4]	1%	14%
Shell Factory and Nature Park	12%	13%
Manatee Park	6%	13%
J.N. Ding Darling National Wildlife Refuge[4]	0%	8%
Broadway Palm Dinner Theater	2%	5%
Bailey-Matthews Shell Museum[4]	2%	3%
Barbara B. Mann Performing Arts Hall	2%	3%
Sanibel Outlets[3]	0%	0%
Periwinkle Place[3]	0%	0%
Other	6%	4%
None	18%	16%

[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 recovery. Shell Museum re-opened for a brief time in February 2023, and fully re-opened on March 1st, 2024.

TRIP EXPERIENCE

Area stayed	Jan - Mar 2023	Jan - Mar 2024
Fort Myers	46%	36%
Cape Coral	17%	21%
Fort Myers Beach	9%	11%
Bonita Springs	8%	10%
Estero	8%	7%
North Fort Myers	3%	3%
Sanibel Island	2%	3%
Captiva Island	1%	3%
Along I-75	2%	2%
Lehigh Acres	2%	2%
Pine Island	<1%	1%
Boca Grande/Outer Islands	1%	<1%
None/not staying overnight	1%	1%

POST-TRIP EVALUATION

Likelihood of Recommending the Area	Jan - Mar 2023	Jan - Mar 2024
Very Likely	44%	60%
Likely	44%	31%
Unsure/don't know	10%	7%
Unlikely	2%	1%
Very Unlikely	<1%	1%

Likelihood of Returning to the Area	Jan - Mar 2023	Jan - Mar 2024
Very Likely	49%	64%
Likely	37%	25%
Unsure/don't know	12%	10%
Unlikely	1%	1%
Very Unlikely	1%	<1%

Likelihood of Returning Next Year	Jan - Mar 2023	Jan - Mar 2024
Very Likely	44%	54%
Likely	33%	21%
Unsure/don't know	19%	20%
Unlikely	3%	4%
Very Unlikely	1%	1%

fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

downs & st. germain RESEARCH

POST-TRIP EVALUATION

Satisfaction with Accommodations	Jan - Mar 2023	Jan - Mar 2024
Exceeded expectations	31%	38%
Met expectations	59%	56%
Did not meet expectations	10%	6%

POST-TRIP EVALUATION

Satisfaction with Visit	Jan - Mar 2023	Jan - Mar 2024
Very satisfied	49%	59%
Satisfied	41%	35%
Neither	7%	4%
Dissatisfied	1%	1%
Very dissatisfied	<1%	<1%
Don't know/no opinion	2%	1%

Satisfaction with Customer Service	Jan - Mar 2023	Jan - Mar 2024
Very satisfied	45%	58%
Satisfied	43%	34%
Somewhat satisfied	8%	5%
Dissatisfied	1%	1%
Very dissatisfied	<1%	<1%
Don't know/no opinion	2%	2%

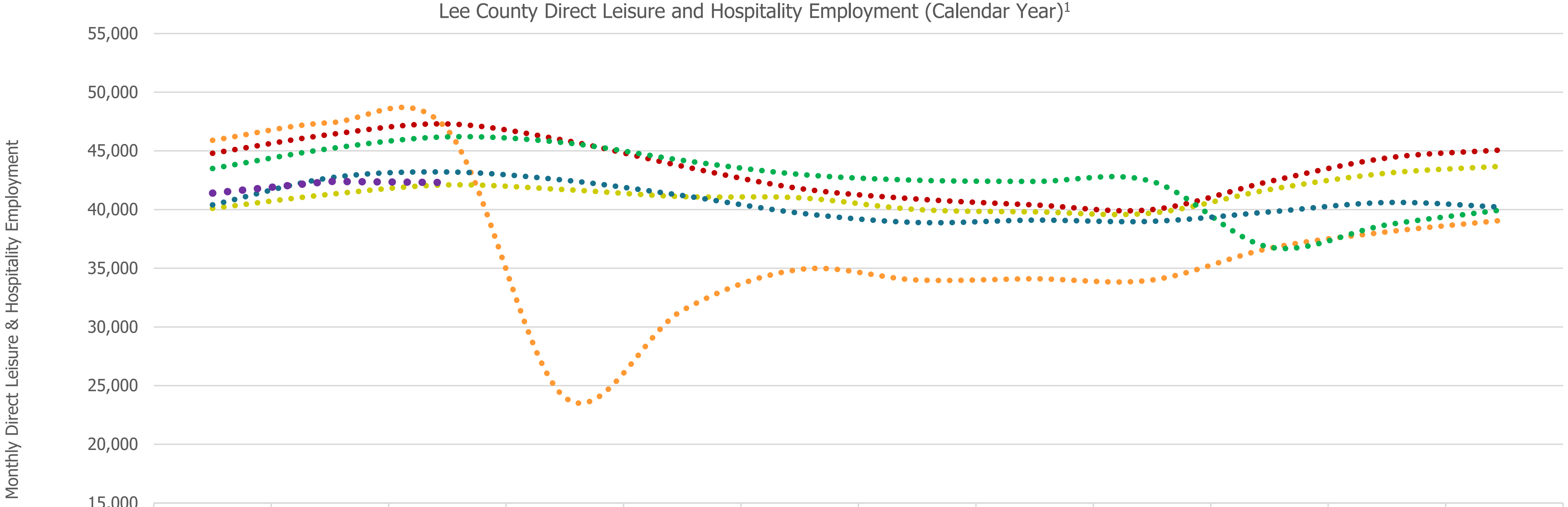
POST-TRIP EVALUATION

Visitor Concerns[1]	Jan - Mar 2023	Jan - Mar 2024
Traffic	39%	51%
High Prices	20%	18%
Damaged buildings, etc.	17%	16%
Red tide	16%	8%
Insects	8%	8%
Construction noise/activity	-	7%
Weather	3%	5%
Water quality	7%	4%
Lack of nightlife	6%	4%
Beach seaweed	3%	3%
Quality of accommodations	3%	2%
Nothing	29%	23%

[1]Multiple responses permitted.

Industry Data

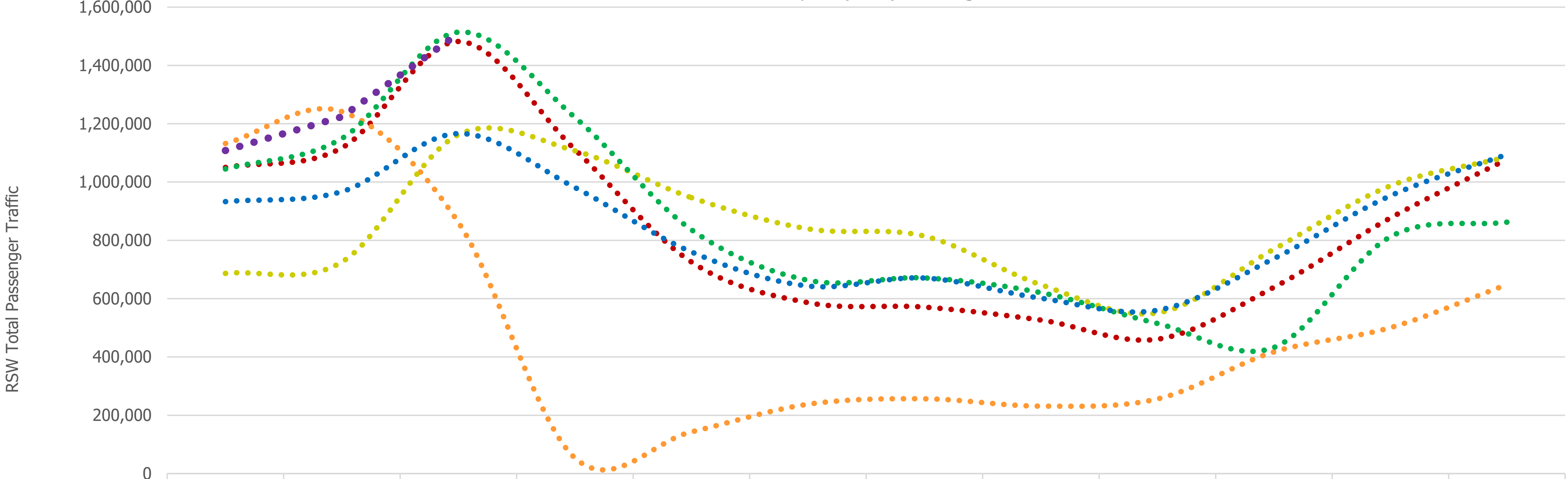
LEISURE & HOSPITALTY EMPLOYMENT



	January	February	March	April	May	June	July	August	September	October	November	December
2019	44,800	46,400	47,300	45,900	43,700	41,800	40,900	40,400	40,000	42,400	44,400	45,100
2020	45,900	47,400	46,800	24,000	31,400	34,900	34,000	34,100	34,000	36,700	38,100	39,100
2021	40,100	41,300	42,100	41,700	41,100	41,000	40,000	39,800	39,700	41,700	43,100	43,700
2022	43,500	45,200	46,200	45,700	44,200	43,000	42,500	42,400	42,400	36,800	38,700	40,000
2023	40,400	42,700	43,200	42,500	41,200	39,700	38,900	39,100	39,000	39,800	40,600	40,200
2024	41,400	42,400	42,300 (P)									

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

RSW PASSENGER TRAFFIC



	January	February	March	April	May	June	July	August	September	October	November	December
2019	1,050,093	1,117,409	1,482,239	1,111,558	725,754	586,319	570,977	526,519	460,869	638,922	876,703	1,077,818
2020	1,132,103	1,241,590	861,221	53,379	143,004	237,706	256,418	231,283	255,926	417,305	500,468	648,011
2021	686,563	725,735	1,162,342	1,107,004	946,366	839,377	814,471	647,534	551,041	769,524	986,908	1,085,569
2022	1,044,816	1,149,618	1,514,046	1,221,628	836,379	663,141	671,225	620,532	515,007	432,667	812,305	862,368
2023	932,896	967,416	1,166,442	981,216	760,330	643,486	670,818	601,542	560,358	737,527	953,025	1,094,783
2024	1,108,190	1,223,761	1,509,777									

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

LICENSED TRANSIENT RENTAL UNITS

Licensed Transient Rental Units in Lee County, as of April 2024[1]					
	Hotel	Motel	Bed & Breakfast	Vacation Rental	Total
Fort Myers	5,420	998	9	562	7,301
Cape Coral	584	204	0	2,536	3,462
Fort Myers Beach	861	318	6	1,844	3,240
Sanibel	145	565	0	1,703	2,549
Bonita Springs	1,244	38	0	519	1,798
North Fort Myers	0	577	0	57	590
Estero	566	0	0	25	592
Captiva	112	151	0	320	375
Lehigh Acres	75	0	0	191	451
Boca Grande	0	0	0	260	262
Saint James City	0	20	0	53	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	**9,007**	**2,911**	**17**	**8,139**	**20,074[2]**

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

Methodology

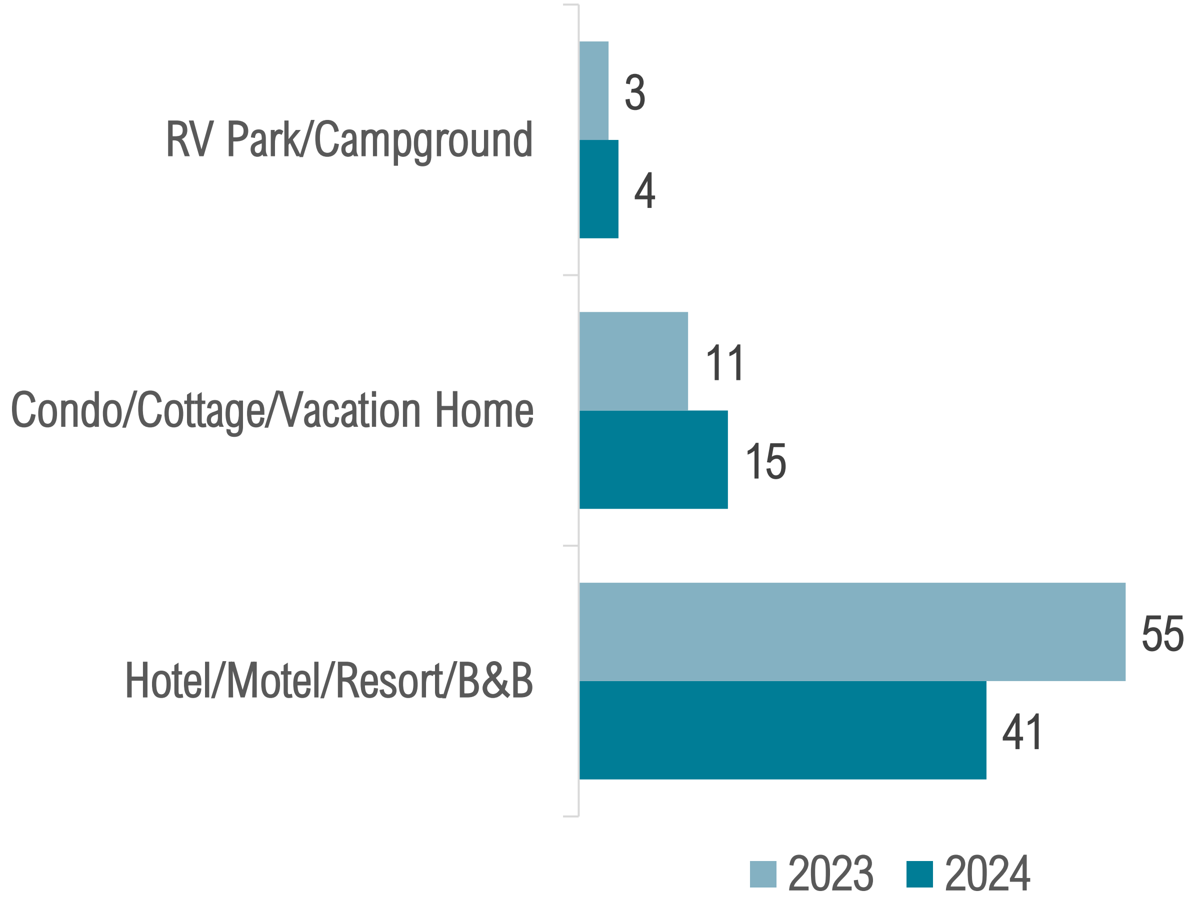
METHODOLOGY

- Economic Impact of tourism in Lee County is derived from:
  - Visitor Tracking Study
    - 1,059 surveys in public areas, hotels, at events around Lee County, and online
    - Target individuals: January - March visitors to Lee County
    - Data Collection: January - March 2024
  - Occupancy Study
    - Email and telephone survey of hotels, rental management companies, RV/campgrounds, etc., as well as data from STR and KeyData reports
    - Sample Size – data from 6,939 hotel/rental/campground units (60 properties) reporting to DSG, 9,467 hotel units reporting to STR (78 properties), and 2,926 rental units (64 property managers) reporting to KeyData
  - IMPLAN Economic Impact Modeling software
    - IMPLAN models the way tourism dollars are spent and re-spent in other sectors of the economy, generating waves of economic activity, called multiplier effects. The model uses national industry data and county-level economic data to generate a series of multipliers, which in turn estimate the total economic implications of economic activity.
    - Over 1,500 organizations use IMPLAN, including FEMA, EPA, Federal Reserve Bank, and Bureau of Land Management.
  - Various government agencies and data sources including Florida Department of Business and Professional Regulation
  - TDT collections provided by the Lee County VCB
  - Tourism database at Downs & St. Germain Research

METHODOLOGY[1]

- Occupancy Study
  - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc.
    - Sample Size: 60 completed surveys
    - Data Collection: Completed in April (for Jan - Mar 2024)
  - Total Sample Size:
    - Data from 6,939 hotel/rental/campground units reporting to DSG (representing 60 properties)
    - Data from 9,467 hotel units reporting to STR (representing 78 properties)
    - Data from 2,926 rental units reporting to KeyData (representing 64 property managers)

Number of Complete Responses



Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

Jan - Mar 2024

Visitor Tracking, Occupancy, & Economic Impact Study

Tamara Pigott, CDME
Executive Director

Downs & St. Germain Research
contact@dsg-research.com
850-906-3111 | www.dsg-research.com