Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

Jul - Sep 2024

Visitor Tracking, Occupancy & Economic Impact Study

fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

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

QUARTERLY SNAPSHOT

Jul - Sep 2024

- Visitation in Jul-Sep 2024 was **down 1.6%** but **room nights** were **up 2.4%** Year-over-Year.
- **Direct Spending** was **up 8.5%** and **Economic Impact of Tourism** was **up 8.0%**, when compared to July-September 2023.
- **International Visitation** had a significant Year-over-Year increase **(+15%)**, going from **94k visitors** in July-September 2023 to **108k visitors** in July-September 2024.
- In July-September 2024 there were large Year-over-Year increases in many satisfaction metrics.
  - 52% of visitors reported being "very likely" return next year (+7% pts).
  - 59% of first-time visitors reported being "very satisfied" with their visit (+10% pts).

47.2%	**$146.09**	**$68.99**
OCCUPANCY RATE	**AVERAGE DAILY RATE**	**REVENUE PER ROOM**
↓ 6.7% from 2023	↑ 8.8% from 2023	↑ 1.6% from 2023

fort MYERS
ISLANDS, BEACHES & NEIGHBORHOODS

downs & st. germain RESEARCH

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

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

TOURISM SNAPSHOT: KEY METRICS Jul-Sep 2023 VS. 2024

Visitor & Lodging Statistics	Jul - Sep 2023	Jul - Sep 2024	% Change '23-'24
Visitors	706,700	695,100	- 1.6%
Visitor Days	4,115,300	4,128,900	+ 0.3%
Room Nights	865,200	885,700	+ 2.4%
Direct Expenditures[1]	$584,185,900	$633,798,700	+ 8.5%
Total Economic Impact[2]	$935,281,600	$1,009,641,300	+ 8.0%

[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 Jul-Sep 2022 VS. 2024

Visitor & Lodging Statistics	Jul - Sep 2022[3]	Jul - Sep 2024	% Change '22-'24
Visitors	1,087,800	695,100	- 36.1%
Visitor Days	5,434,300	4,128,900	- 24.0%
Room Nights	1,258,100	885,700	- 29.6%
Direct Expenditures[1]	$772,879,000	$633,798,700	- 18.0%
Total Economic Impact[2]	$1,231,196,200	$1,009,641,300	- 18.0%

[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] Figures have been slightly revised to reflect up-to-date lodging data, specifically regarding September 2022.

TOURISM SNAPSHOT: KEY METRICS FISCAL YEAR-TO-DATE

Visitor & Lodging Statistics	FYTD 2023[3]	FYTD 2024[3]	% Change '23-'24
Visitors	2,451,500	3,138,300	+ 28.0%
Visitor Days	16,656,300	19,723,900	+ 18.4%
Room Nights	3,677,000	4,342,700	+ 18.1%
Direct Expenditures[1]	$2,499,887,000	$3,087,308,700	+ 23.5%
Total Economic Impact[2]	$3,998,145,600	$4,923,351,700	+ 23.1%

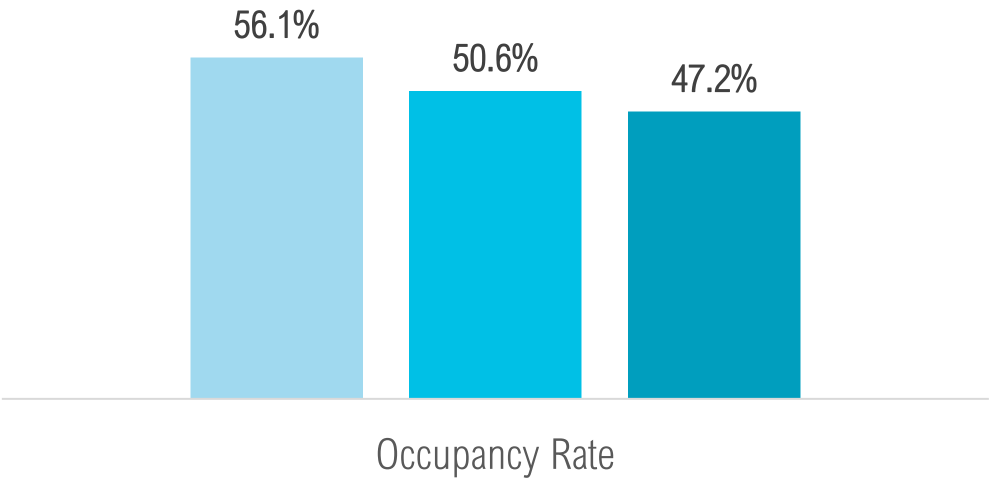
[1] Includes: accommodations, restaurants, entertainment, shopping, transportation, groceries, and "other" expenses.
[2] Economic impact includes indirect and induced effects of visitor spending. Indirect effects are increased business spending resulting from tourism dollars. Induced effects are increased household spending resulting from tourism dollars.
[3] Data has been revised to reflect updated unit figures for RV Parks & Campgrounds as determined in a survey of Lee County RV Parks & Campgrounds conducted by DSG Research in 2023.

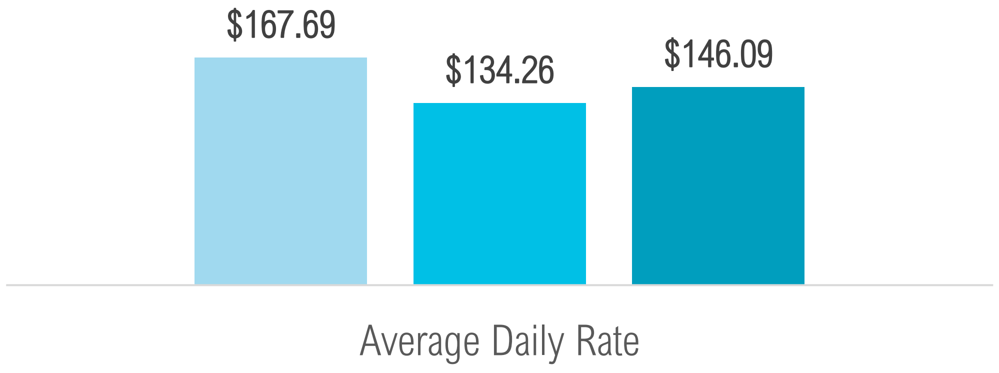
JULY-SEPT LODGING STATISTICS[1]

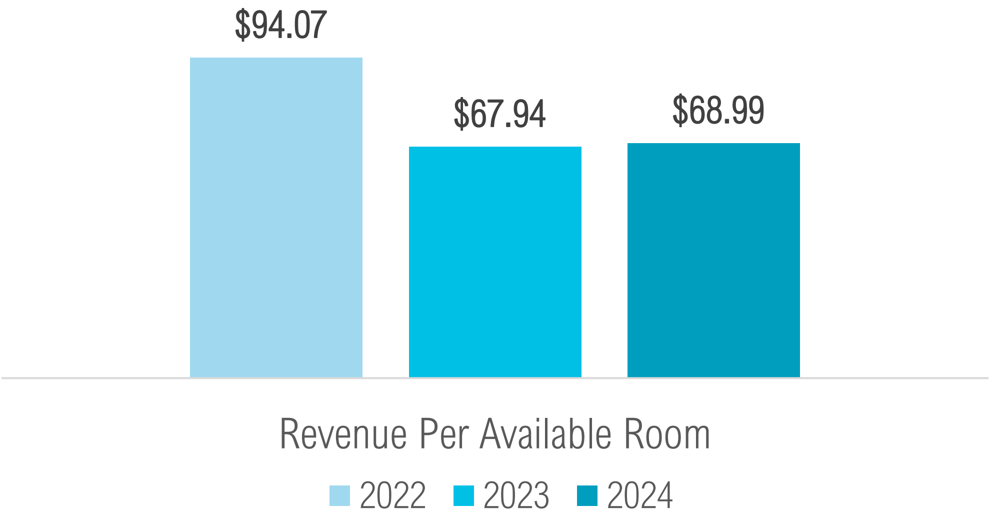
47.2%	$146.09	$68.99
Occupancy	ADR	RevPAR
↓ 6.7%	↑ 8.8%	↑ 1.6%
From 2023	From 2023	From 2023

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

JULY-SEPT 2022-2024 OVERALL LODGING METRICS[1,2]

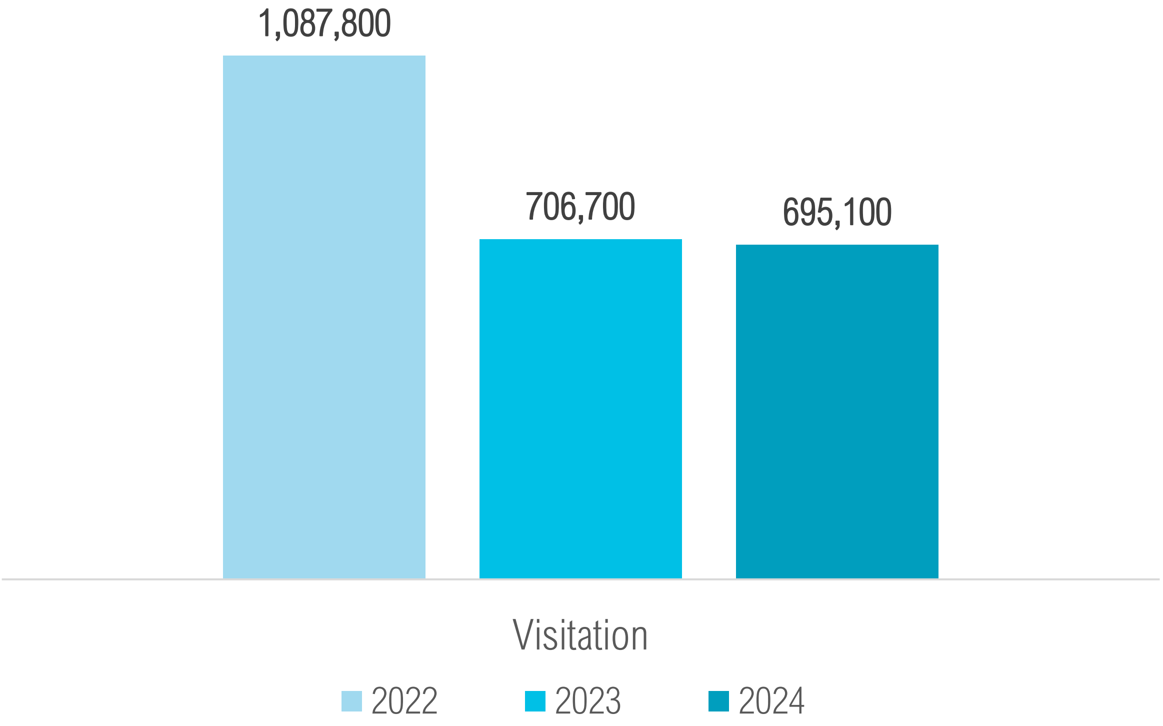


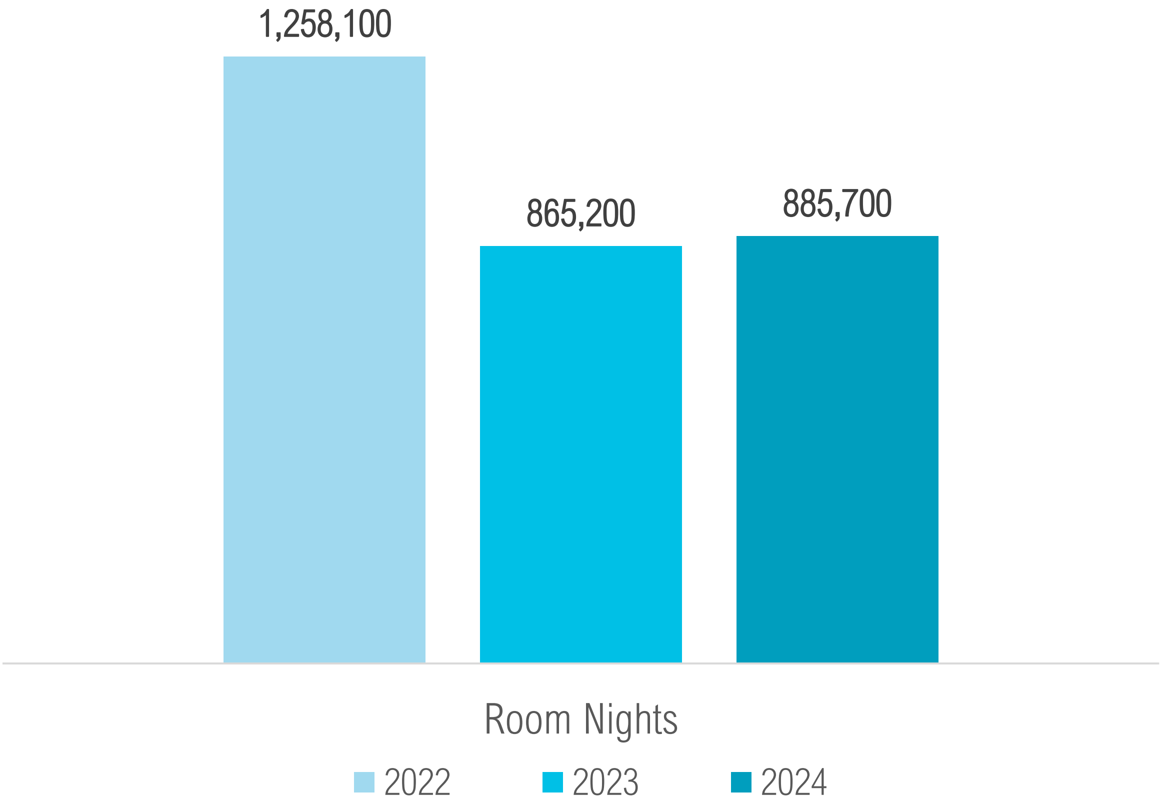




[1] Sources: STR, KeyData, & DSG Occupancy Study
[2] 2022 & 2023 data has been revised to reflect updated unit figures for RV Parks & Campgrounds as determined in a survey of Lee County RV Parks & Campgrounds conducted by DSG Research.

JULY-SEPT 2022-2024 VISITATION & ROOM NIGHTS[1,2]

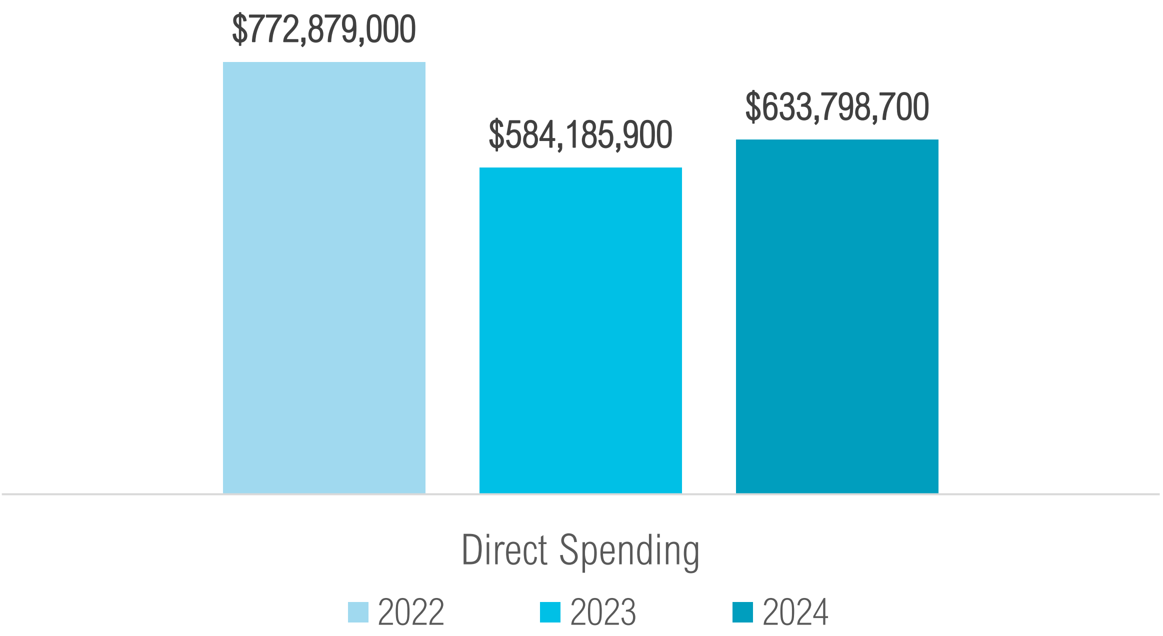


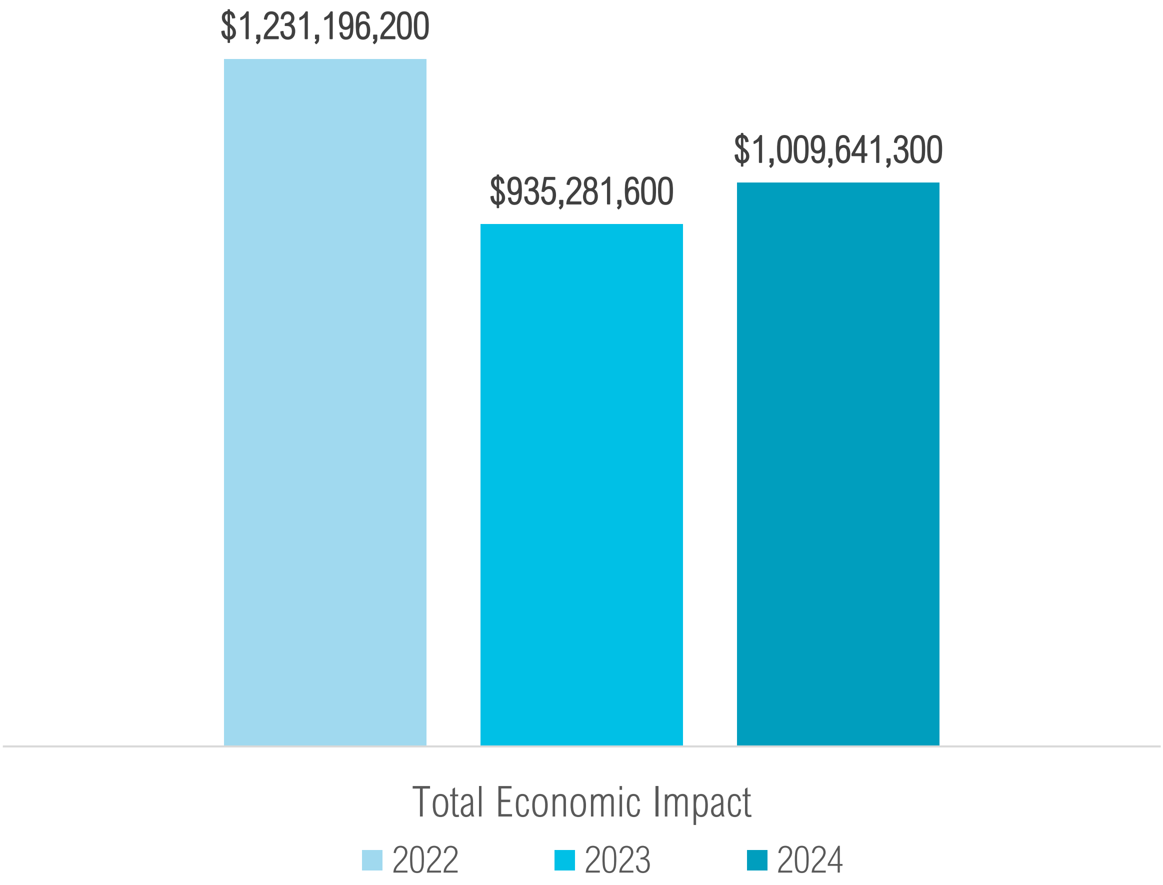


[1] Sources: STR, KeyData, & DSG Occupancy Study

[2] 2022 & 2023 data has been revised to reflect updated unit figures for RV Parks & Campgrounds as determined in a survey of Lee County RV Parks & Campgrounds conducted by DSG Research.

JULY-SEPT 2022-2024 SPENDING & ECONOMIC IMPACT[1,2]





[1] Sources: STR, KeyData, & DSG Occupancy Study
[2] 2022 & 2023 data has been revised to reflect updated unit figures for RV Parks & Campgrounds as determined in a survey of Lee County RV Parks & Campgrounds conducted by DSG Research.

VISITOR JOURNEY: PRE-VISIT

Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

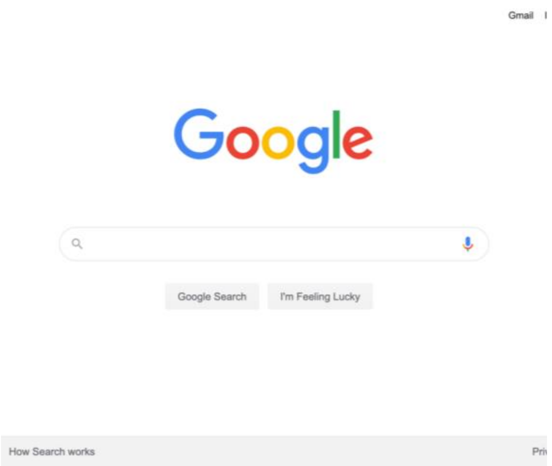
TRIP PLANNING

- 2 in 5 visitors planned their trips to the Fort Myers area 1-2 months in advance
- The median trip planning cycle lasted nearly 2 months
- Nearly 2 in 5 visitors requested information to plan their trips
  - Over 1 in 4 visitors called a hotel, motel, or condo
  - 8% of visitors requested a visitor guide
- 38% of visitors considered choosing other destinations when planning their trips

TRIP PLANNING: WEBSITES/APPS USED

- Over 4 in 5 visitors used websites and apps to plan their trips to the Fort Myers area
- Top websites and apps used to plan their trips include[1]:

35% Airline Websites/Apps



28% Search Engines

20% Airbnb, Vrbo, etc.

17% Booking websites

[1]Multiple responses permitted.

TOP TRIP INFLUENCES

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

88% Peaceful/relaxing

84% Warm weather

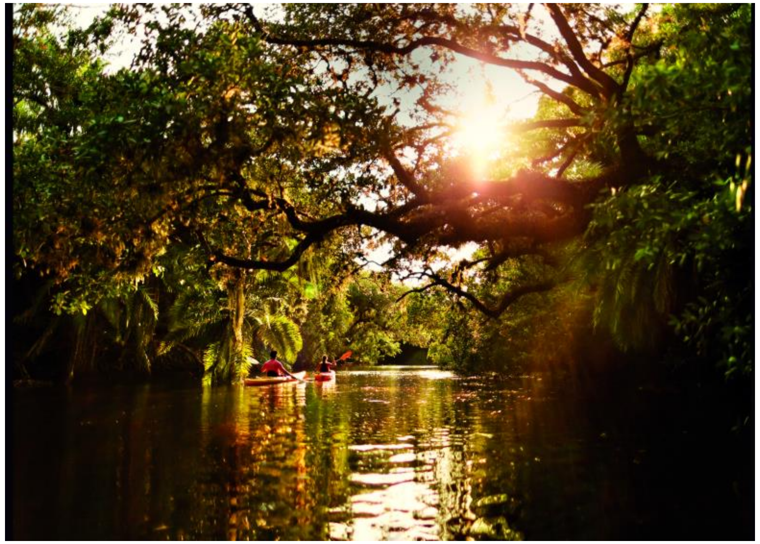
84% A safe destination

[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]:

45% Beach



43% Relax & Unwind

28% Visiting Friends & Relatives

[1]Three responses permitted.

PROMOTION RECALL

- Nearly 2 in 5 visitors recalled promotions in the past 6 months for the Fort Myers area
- 18% of all visitors were influenced to come to the Fort Myers area by these promotions
- Top sources of recall include[1]:

51% Internet

36% Social media

22% Traveler reviews, blogs

10% Television

[1]Multiple responses permitted.

BOOKING

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

42% Directly with hotel/condo

17% Online travel agency

15% Airbnb

15% Vrbo

TRANSPORTATION

- 73% of visitors flew to the Fort Myers area
- 62% of all visitors traveled to the Fort Myers area via RSW

VISITOR JOURNEY: TRAVEL PARTY PROFILE

Pre-Visit

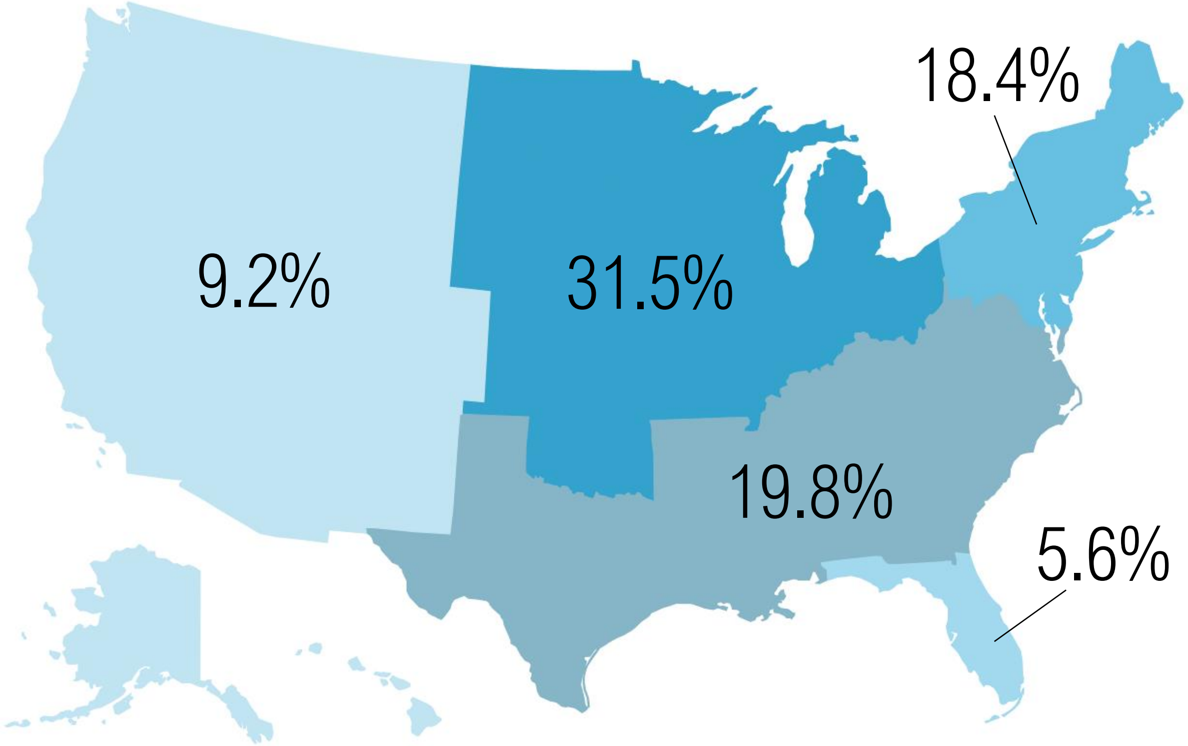
Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

ORIGIN REGION[1]



US = 84.5%

Canada – 7.5%

Germany – 3.4%

4.6% Other International Markets
(UK, Other Europe, etc.)

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

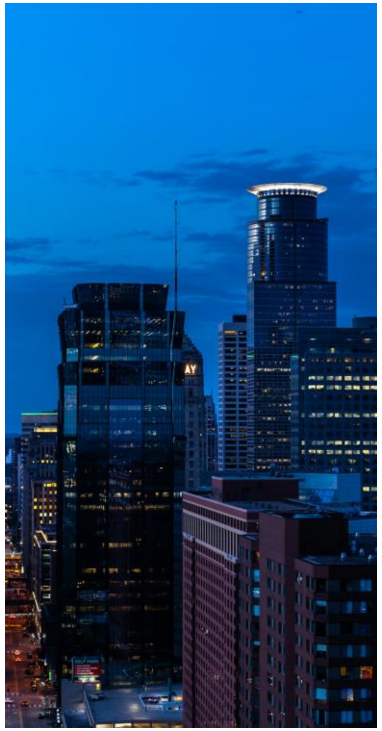
TOP ORIGIN MARKETS[1]

6% New York

5% Chicago

4% Atlanta

3% Cleveland



3% Minneapolis

3% 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 3.0 people[1]
- 37% traveled with children
- Nearly half of visitors traveled as a family, and 1 in 3 visitors traveled as a couple

[1]Sources: Occupancy Study and Visitor Tracking Study

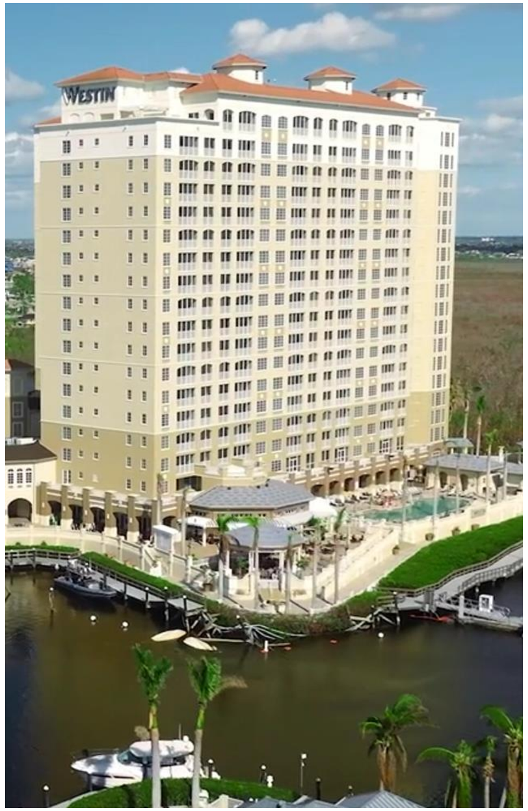
DEMOGRAPHIC PROFILE[1]

July - September Visitors:

- Median age of 48 years old
- Median household income of $108,700
- Married (75%)
- College educated (69%)
- Caucasian/white (79%)

Visitor Journey: Trip Experience

TOP ACCOMMODATIONS



42% Hotel/Motel/Resort

18% Personal second home, etc.

15% Vacation Rental

12% Staying with friends/relatives

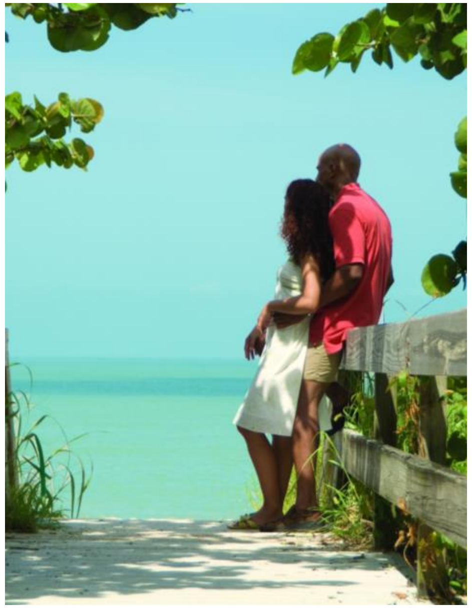
LENGTH OF STAY & NUMBER OF TIMES IN DESTINATION

- Visitors[1] spent an average of 5.9 nights in the Fort Myers area
- 30% were first time visitors
- 21% have visited more than 10 times

[1]Sources: Occupancy Study and Visitor Tracking Study

VISITOR ACTIVITIES

- Top visitor activities include[1]:



69% Relaxing & unwinding

64% Beach

63% Dining out

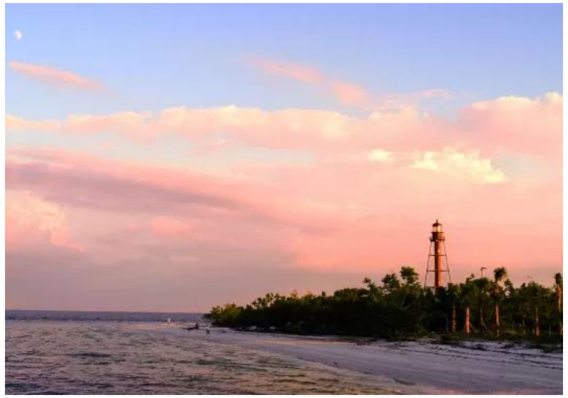
42% Visit friends/relatives

42% Shopping

[1]Multiple responses permitted.

TOP ATTRACTIONS VISITED[1]

66% Beaches



28% Sanibel Lighthouse

21% Bell Tower Shops

20% Edison & Ford Estates

[1]Multiple responses permitted.

TOP COMMUNITIES STAYED

34% Fort Myers

16% Fort Myers Beach

15% Cape Coral

VISITOR JOURNEY: POST-TRIP EVALUATION

SATISFACTION

- 94% of visitors are likely to recommend the area
  - 55% are very likely to recommend
- 90% of visitors are likely to return
  - 57% are very likely to return
- 77% of visitors are likely to return next year
  - 52% are very likely to return next year

SATISFACTION

- 97% of visitors were satisfied or very satisfied with their overall visit to the Fort Myers area (60% were very satisfied)
- 94% of visitors were satisfied or very satisfied with customer service on their visit (59% were very satisfied)
- 96% of visitors said paid accommodations at least met their expectations (45% said they exceeded expectations)

TOP ATTRIBUTE RATINGS

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

94% Peaceful/relaxing

93% Warm weather

93% 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

- Over 1 in 4 visitors mentioned traffic as their least favorite part of their visit.
- Nearly 1 in 4 visitors mentioned damaged buildings, etc., while 21% of visitors mentioned insects, and 18% mentioned high prices.
- Over 1 in 5 visitors said there was nothing they disliked about the area during their visit.

AREA DESCRIPTIONS

Peaceful/relaxing

"Peaceful, with beautiful sights, and wonderful people."

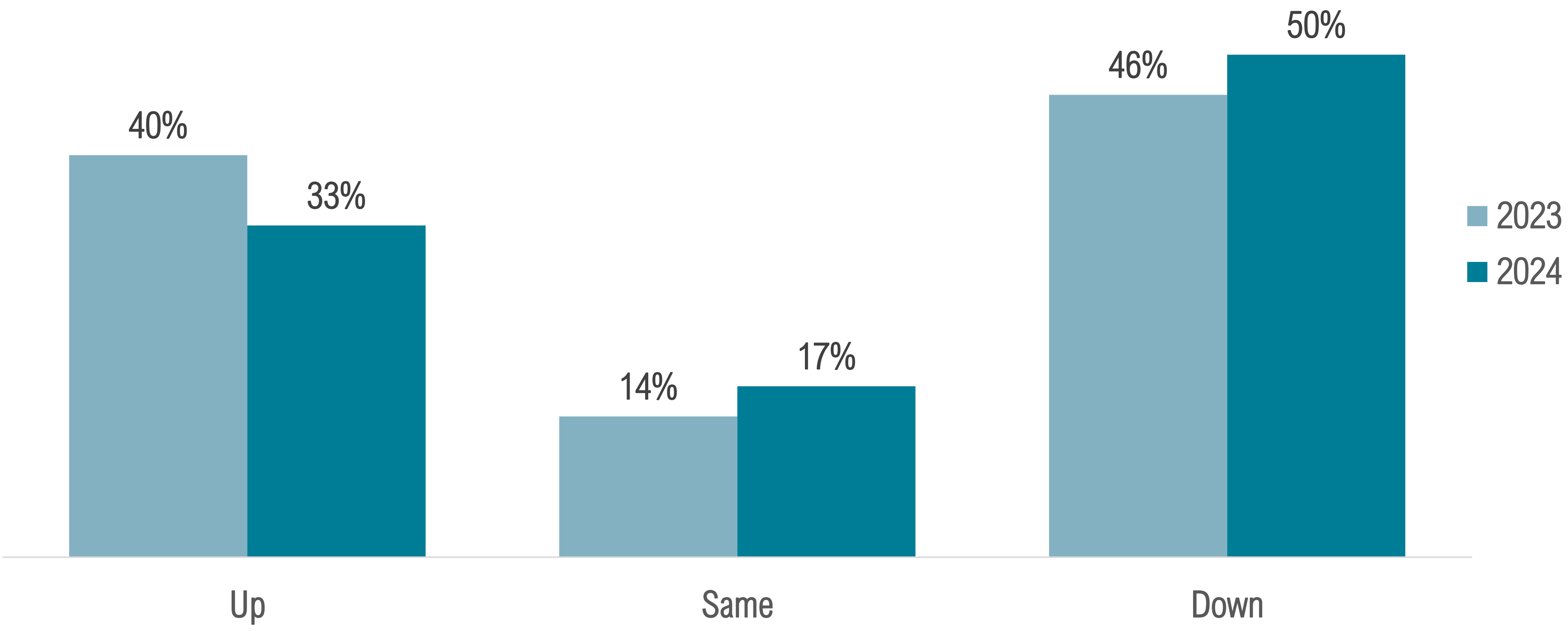
Warm Weather

"Nice vacation with a great tropical setting, warm weather, gorgeous coasts, crystal clear water, and good fishing."

Safe Destination

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

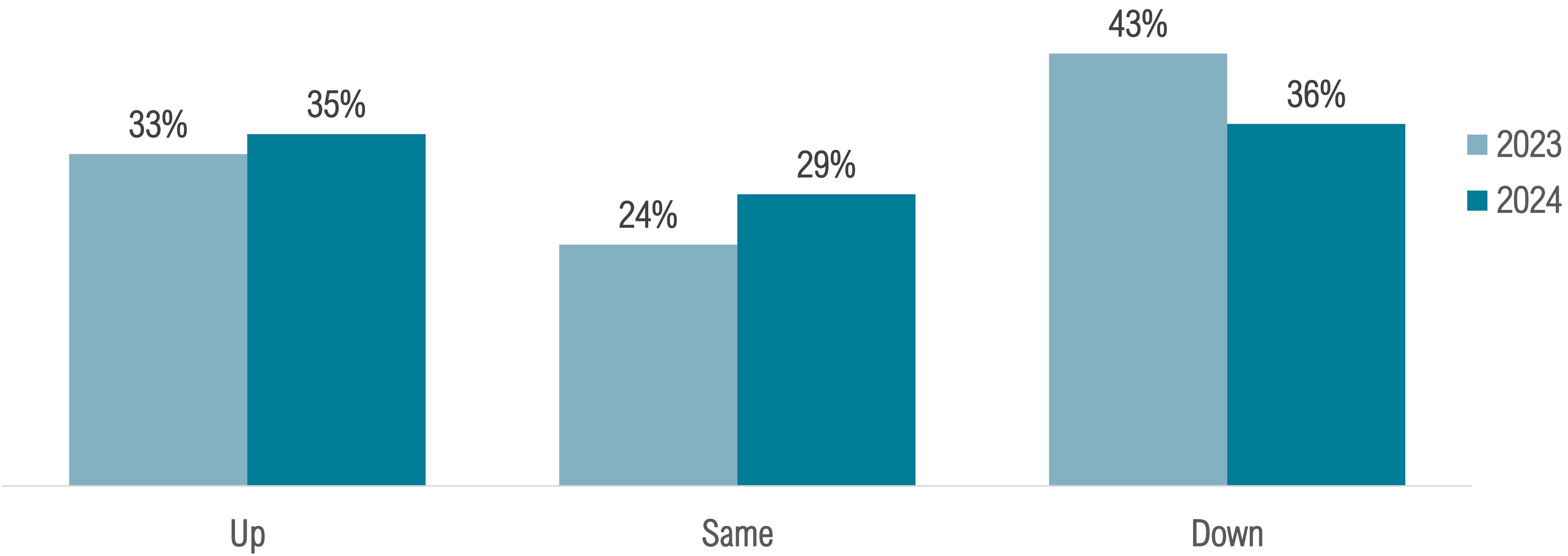
OCCUPANCY BAROMETER[1]: OCT – DEC RESERVATIONS



[1]Sources: Occupancy Survey

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

OCCUPANCY BAROMETER[1]: JAN – MAR RESERVATIONS



[1]Sources: Occupancy Survey
Accommodations partners were asked the following, “Please think about your reservations for the next three months. Compared to the same period a year ago, would you say the total level of reservations are up, the same, or down?”

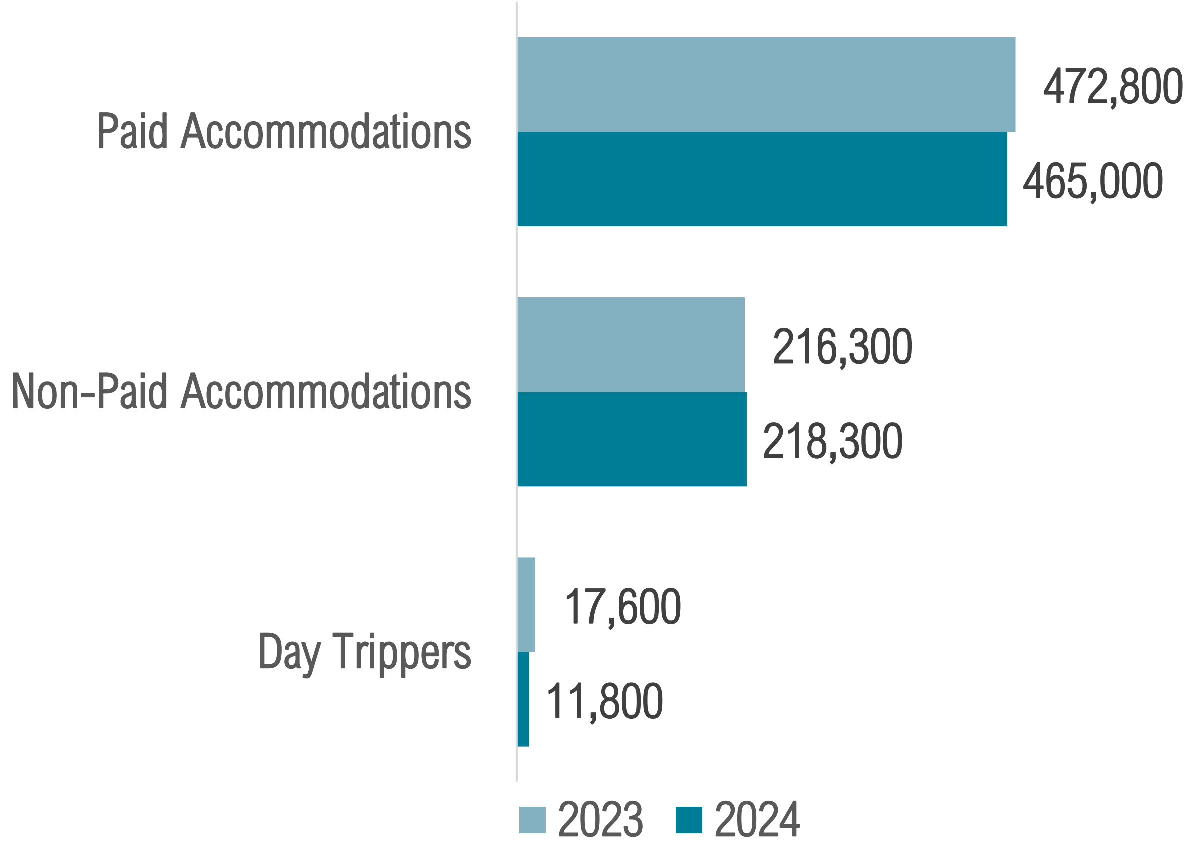
Detailed Findings

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION

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

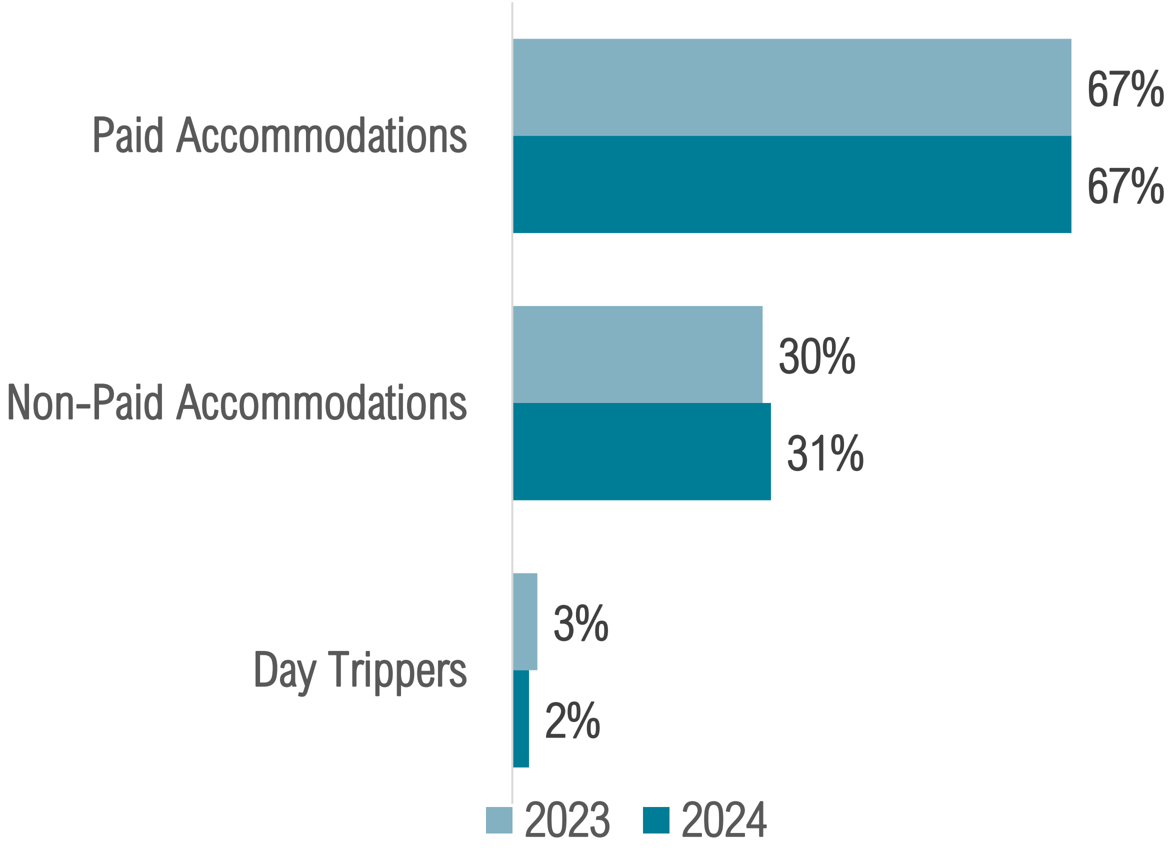
NUMBER OF VISITORS

There were 695,100 visitors to the Fort Myers area in Jul - Sep 2024 (-1.6% from 2023).



VISITOR TYPE

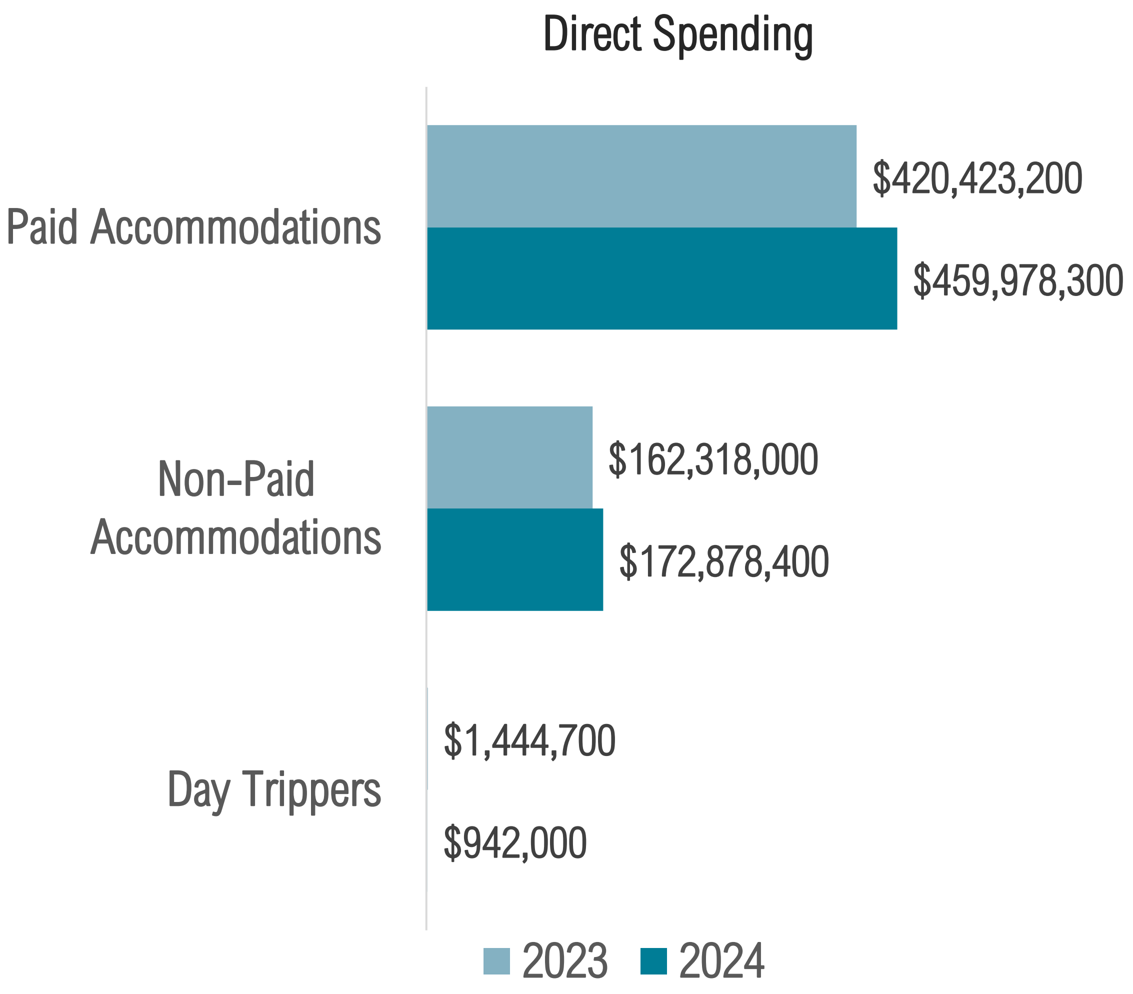
Visitors staying in paid accommodations accounted for **2 in 3** visitors.



VISITOR EXPENDITURES BY VISITOR TYPE

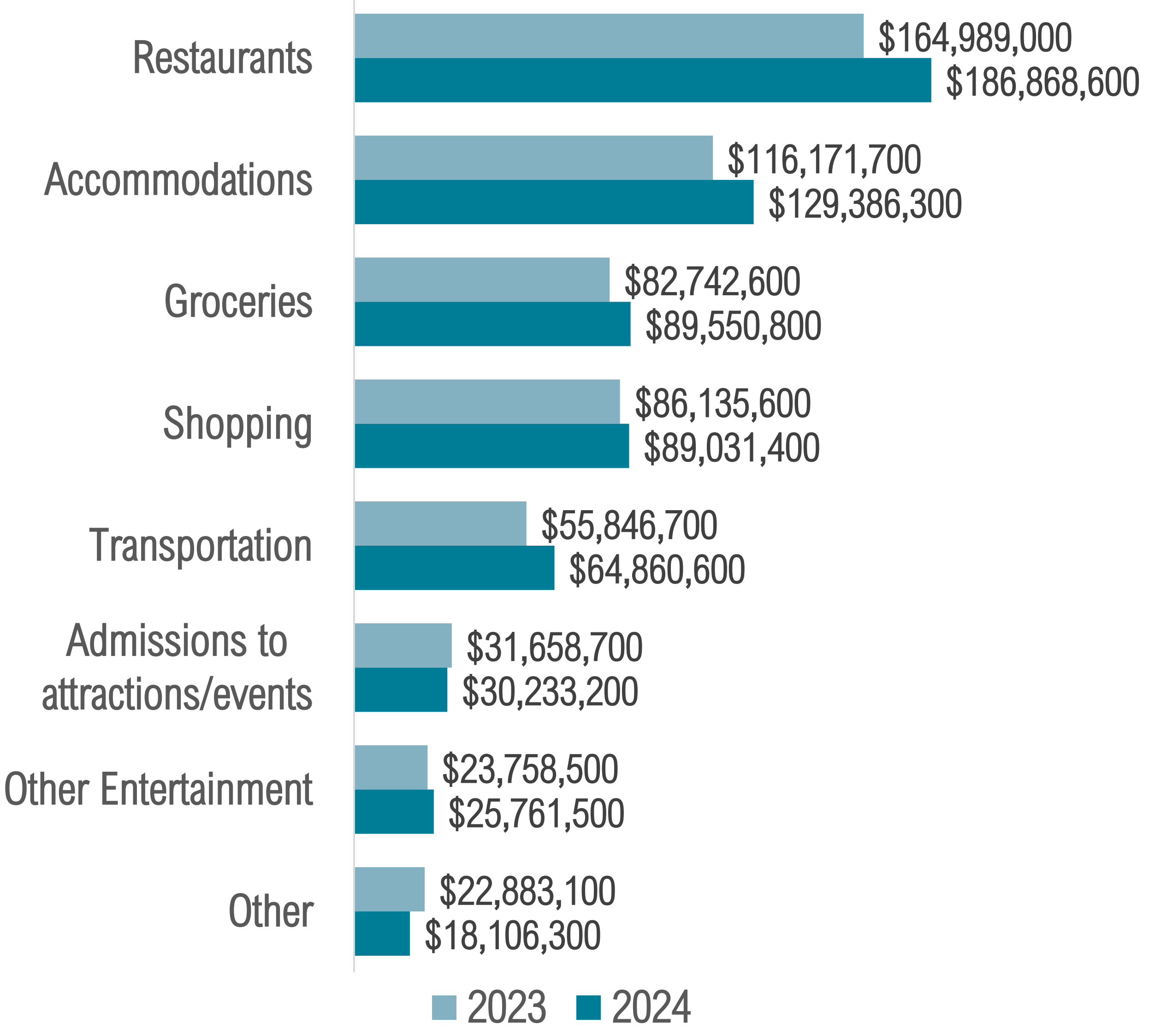
Jul - Sep visitors spent $633,798,700 in the Fort Myers area, resulting in a total economic impact of $1,009,641,300, up 8.0% from 2023.

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



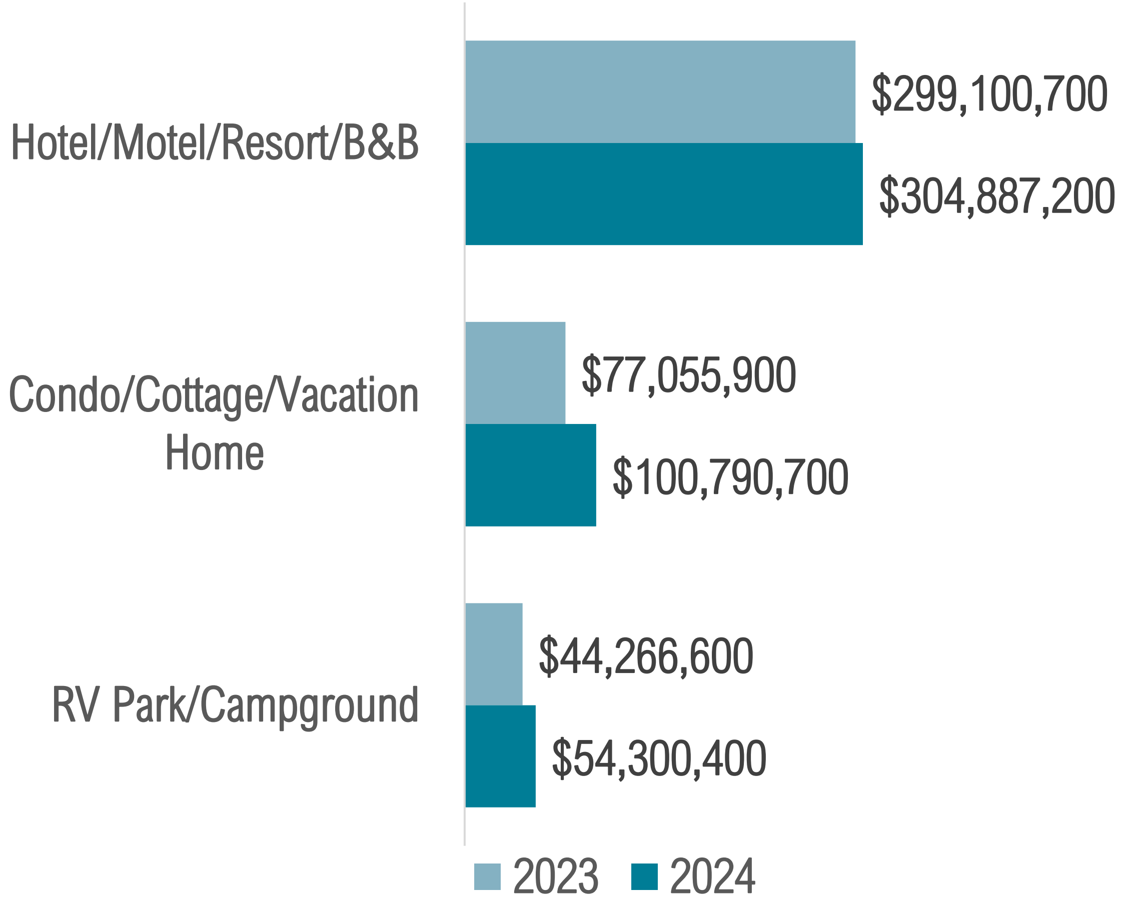
VISITOR EXPENDITURES BY SPENDING CATEGORY

Of the $633,798,700 visitors spent in the Fort Myers area, 30% was spent on restaurants and 20% was spent on accommodations, accounting for half of all visitor spending.



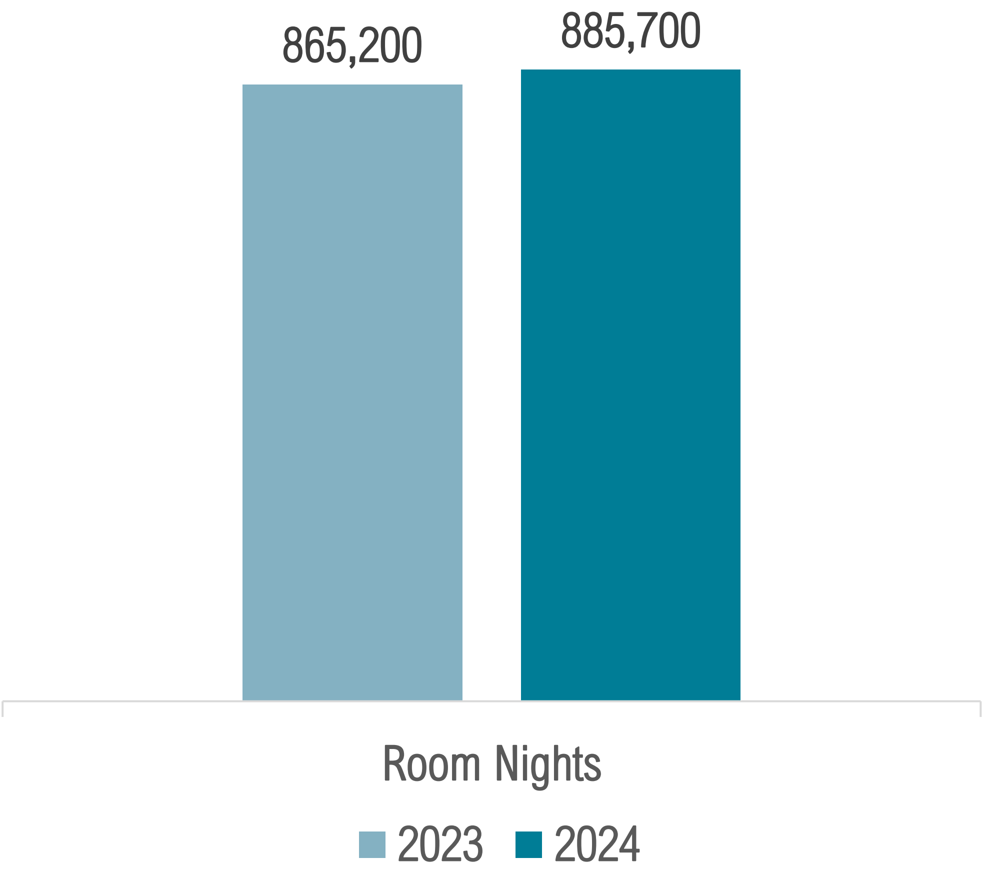
VISITOR EXPENDITURES BY LODGING TYPE

Jul - Sep visitors staying in paid accommodations spent $459,978,300 in the Fort Myers area.



ROOM NIGHTS GENERATED

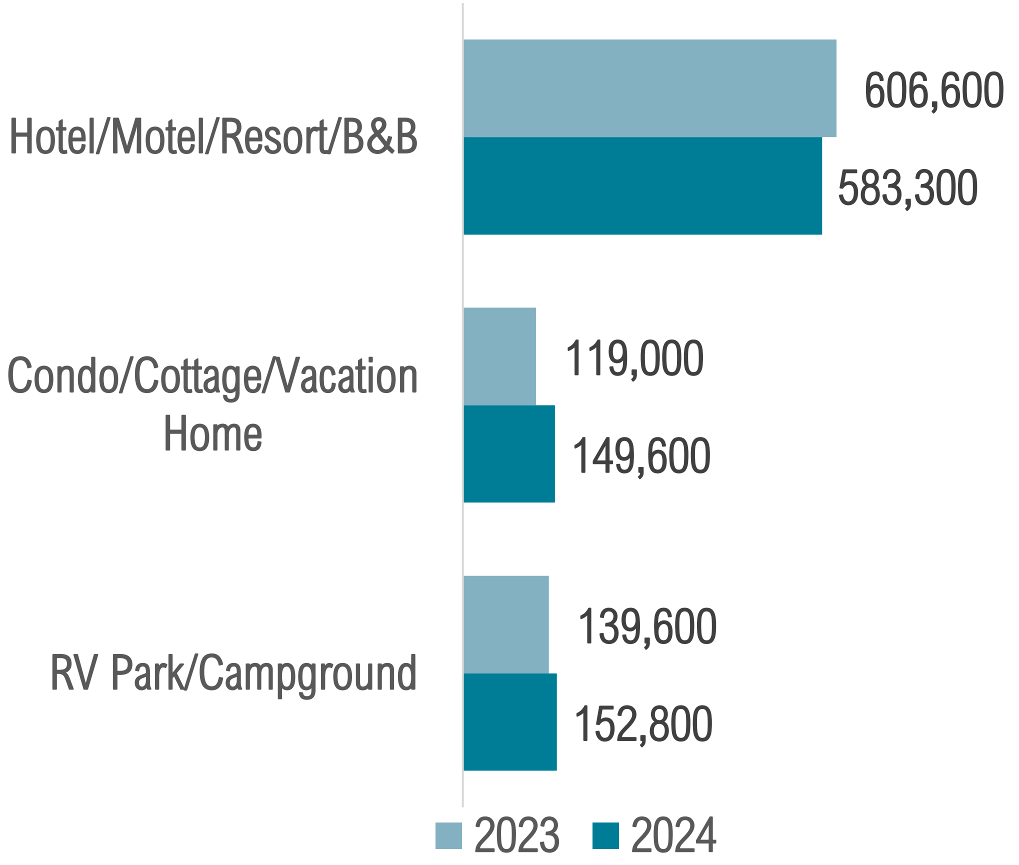
Jul-Sep visitors spent 885,700[1] nights in Fort Myers area hotels, resorts, condos, rental houses, RV parks, etc. (+2.4% from 2023).



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

ROOM NIGHTS GENERATED

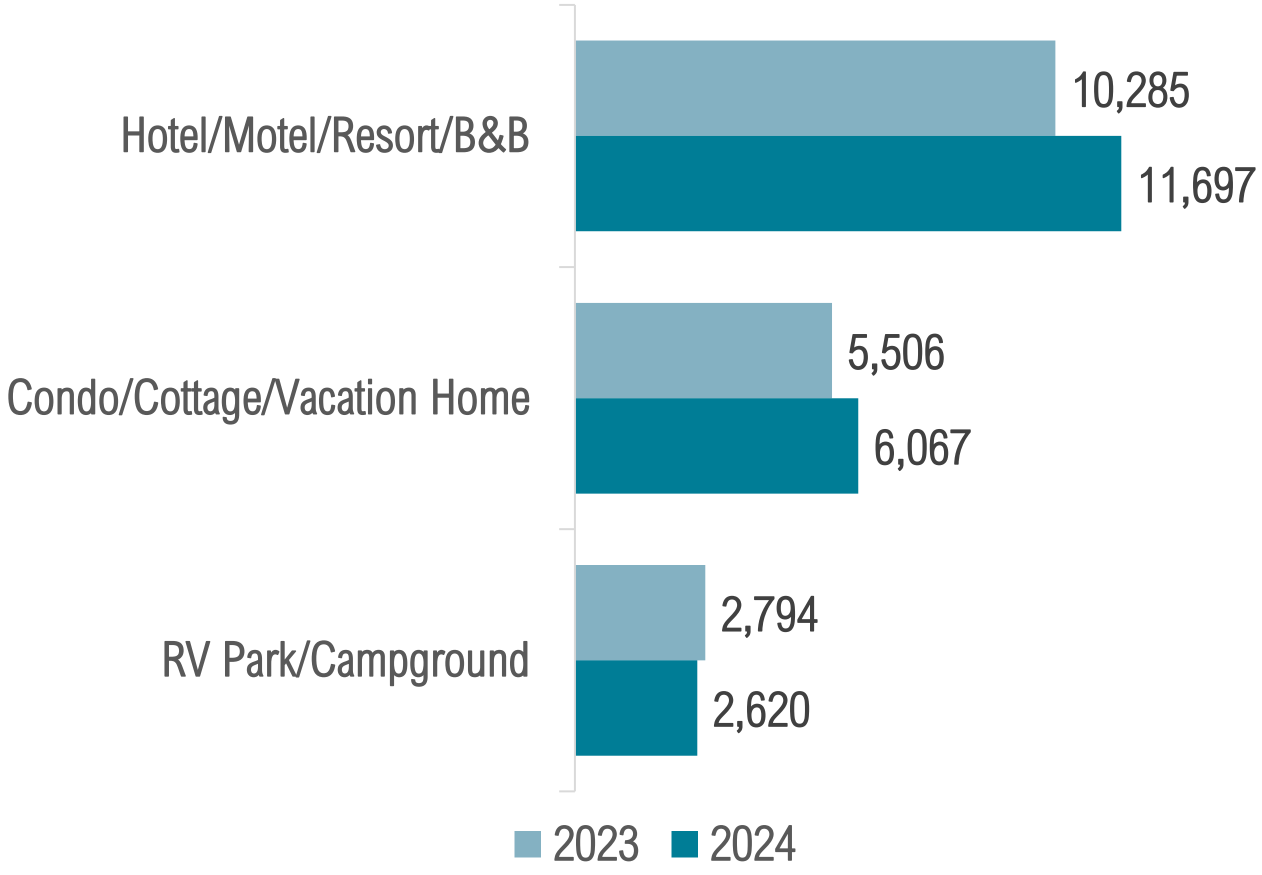
Hotels, motels, etc. accounted for **nearly 2 in 3** room nights spent in the Fort Myers area, while RV parks/campgrounds accounted for **17%** and vacation rentals accounted for the remaining **17%** of room nights that visitors spent in the area.



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

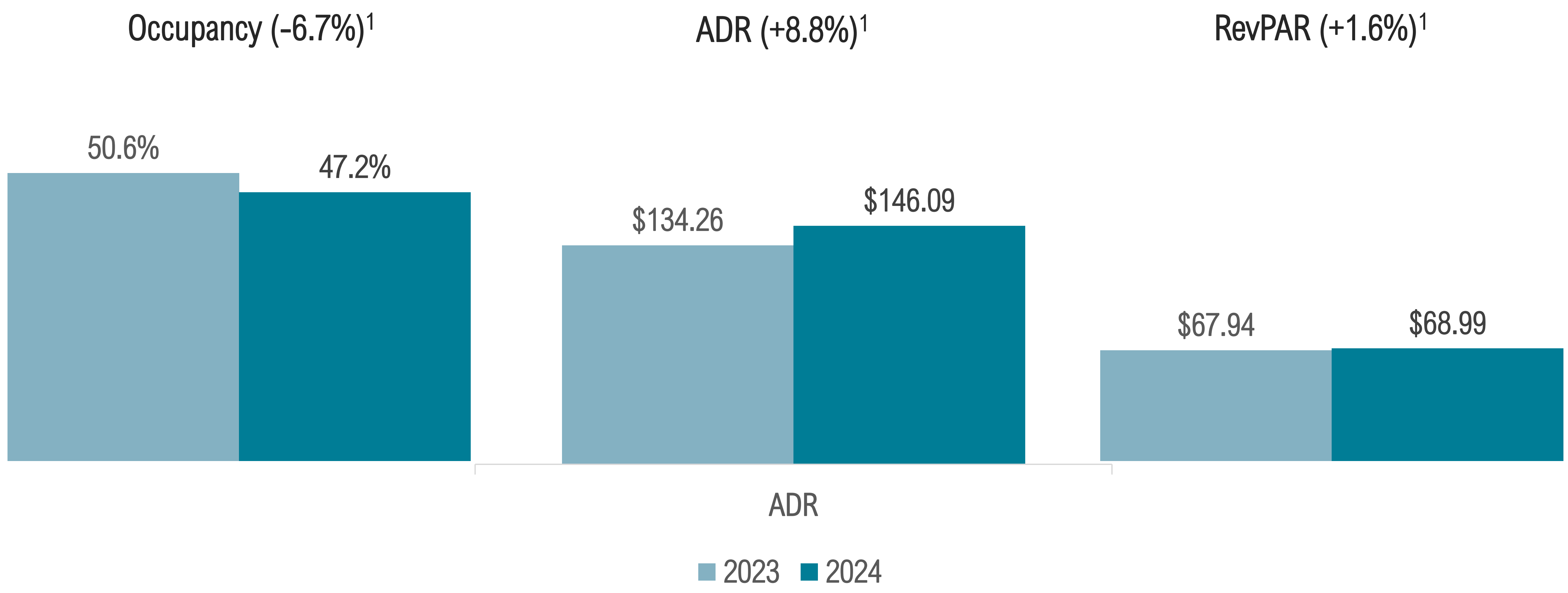
AVAILABLE UNITS

There were 20,384[1] available units in Jul - Sep 2024 vs. 18,585 in 2023 (+9.7%). Nearly 3 in 5 units available were from hotels, motels, etc.



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

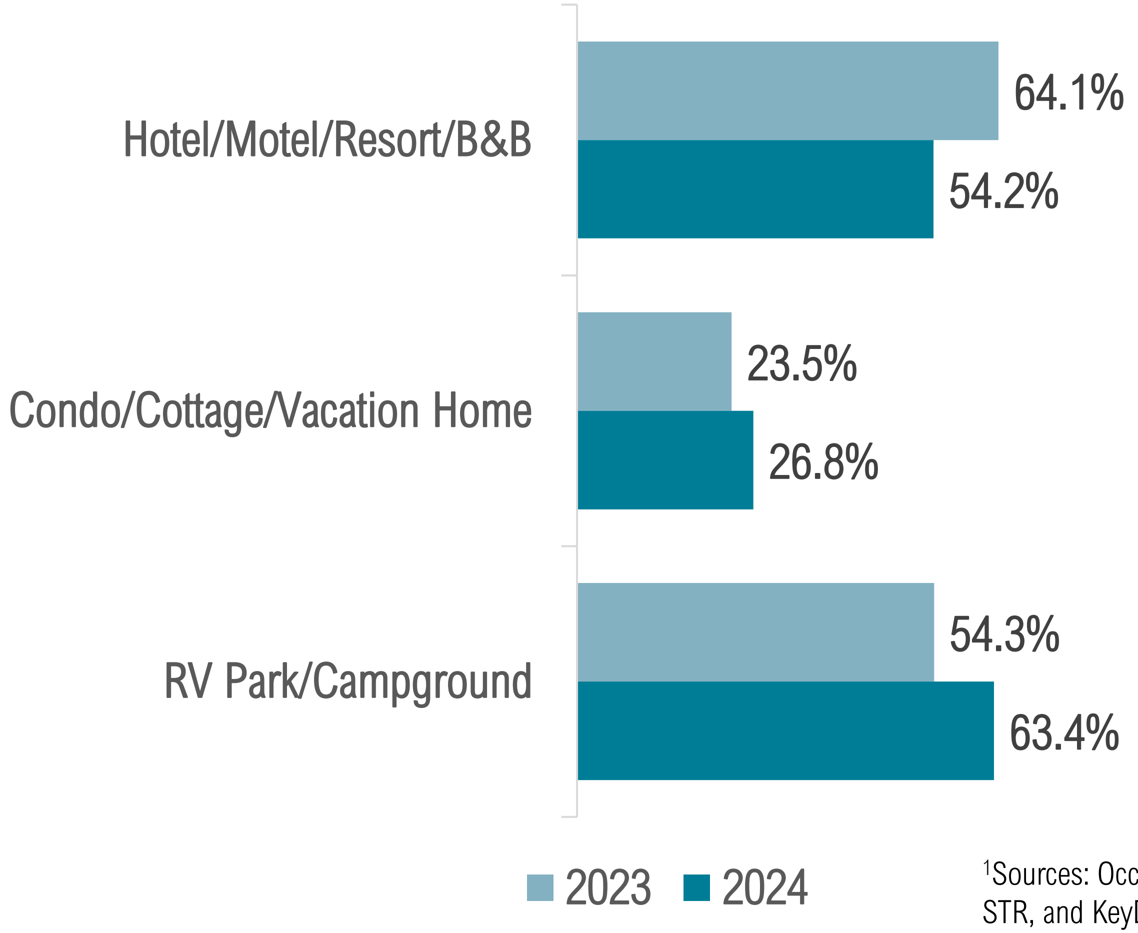
OCCUPANCY, ADR AND REVPAR



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

OCCUPANCY

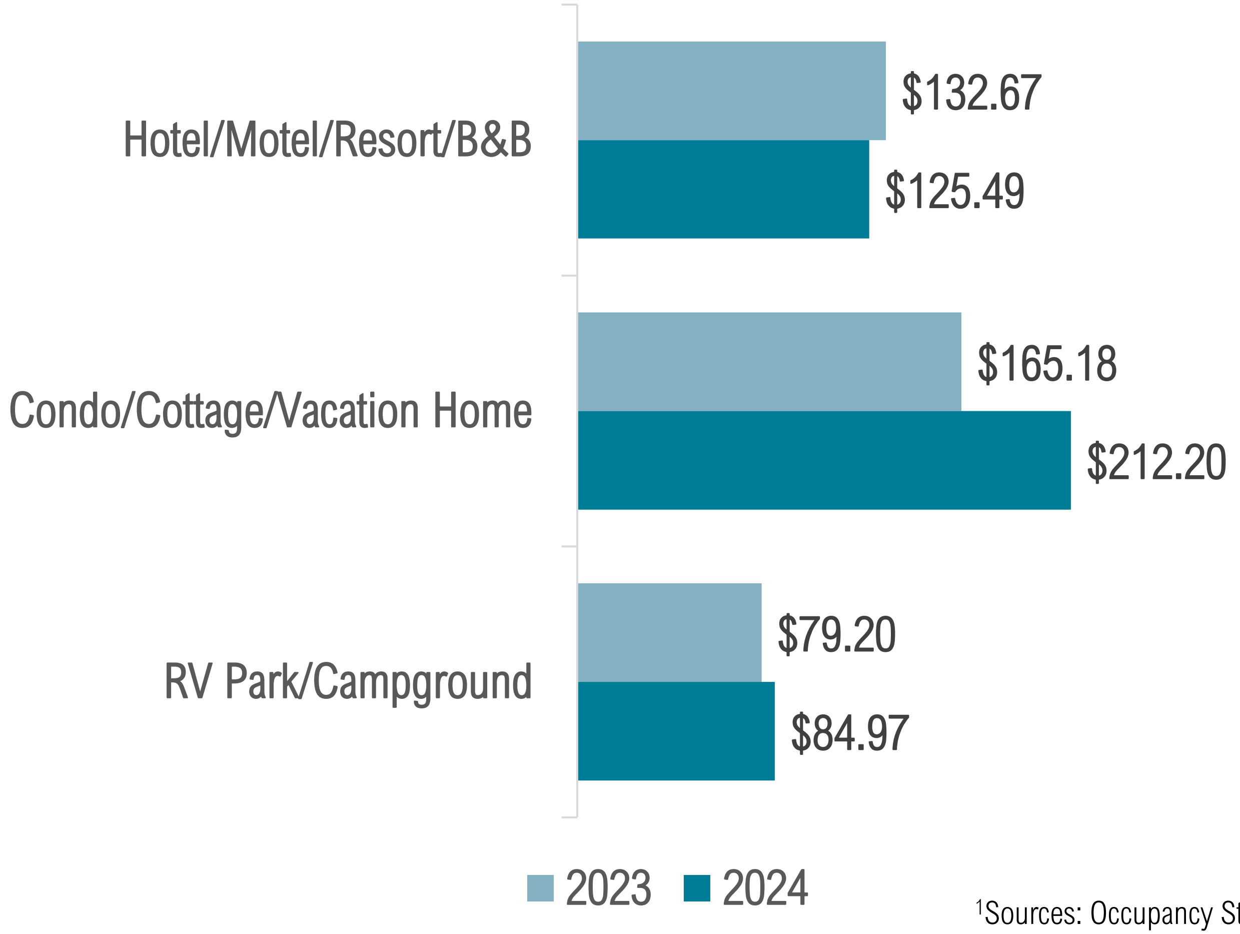
Average occupancy in July-September was 47.2%[1] (50.6% in 2023).



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

ADR

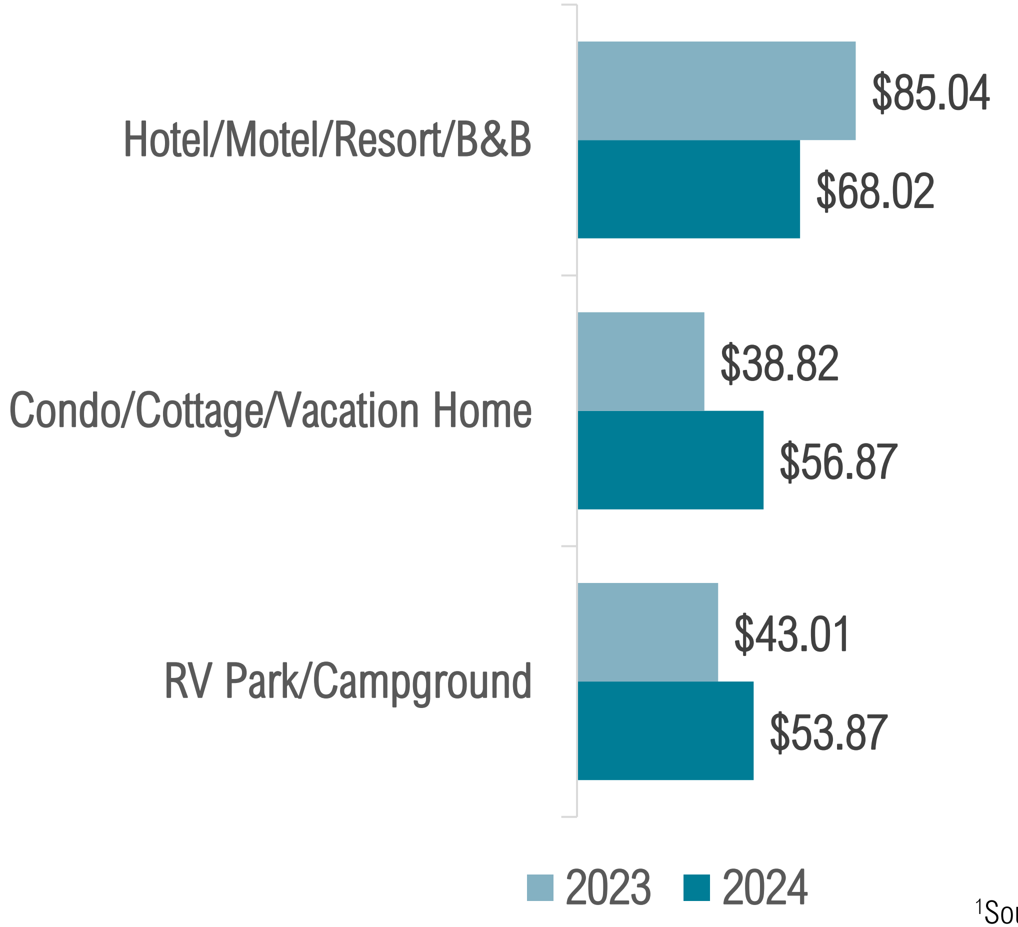
ADR in July-September was **$146.09**[1] ($134.26 in 2023).



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

REVPAR

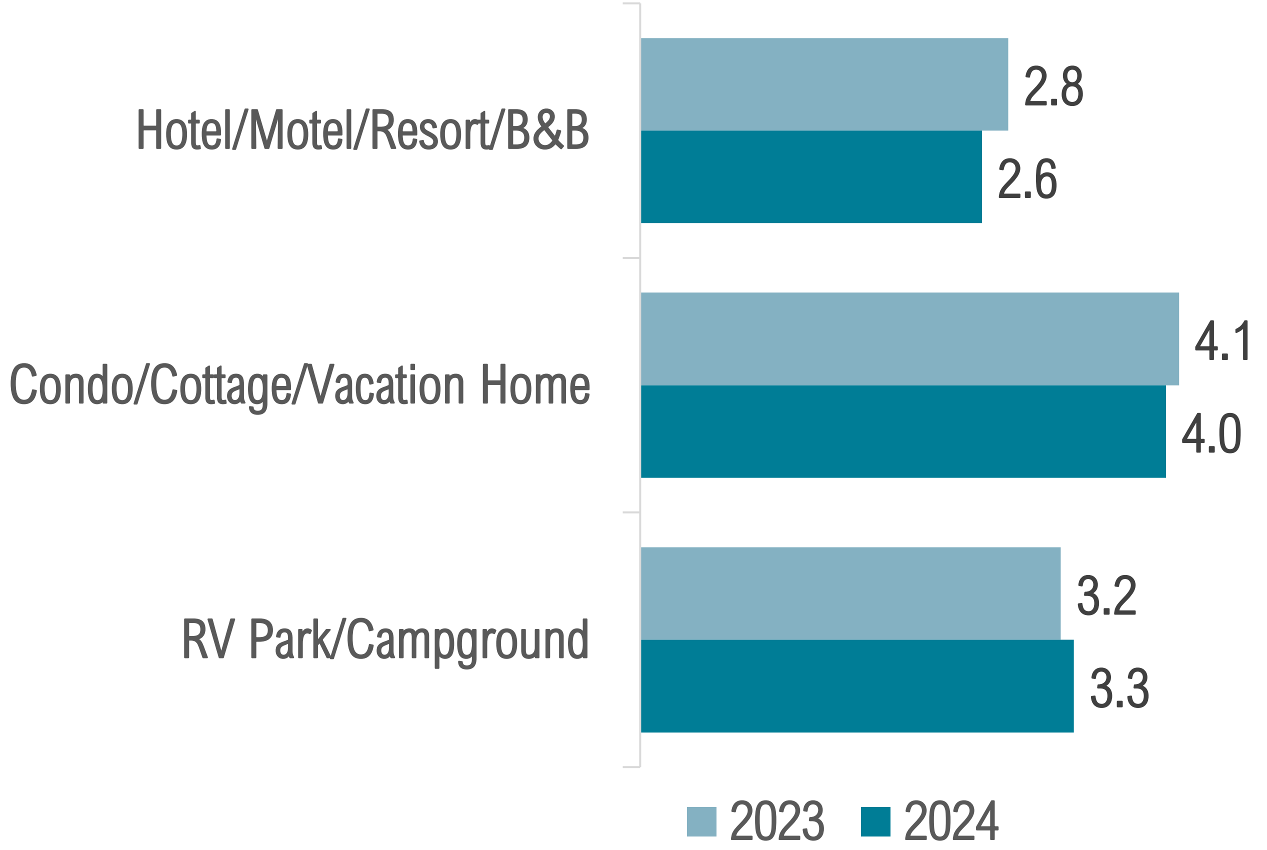
Average RevPAR in July-September was $68.99[1] ($67.94 in 2023).



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

TRAVEL PARTY SIZE

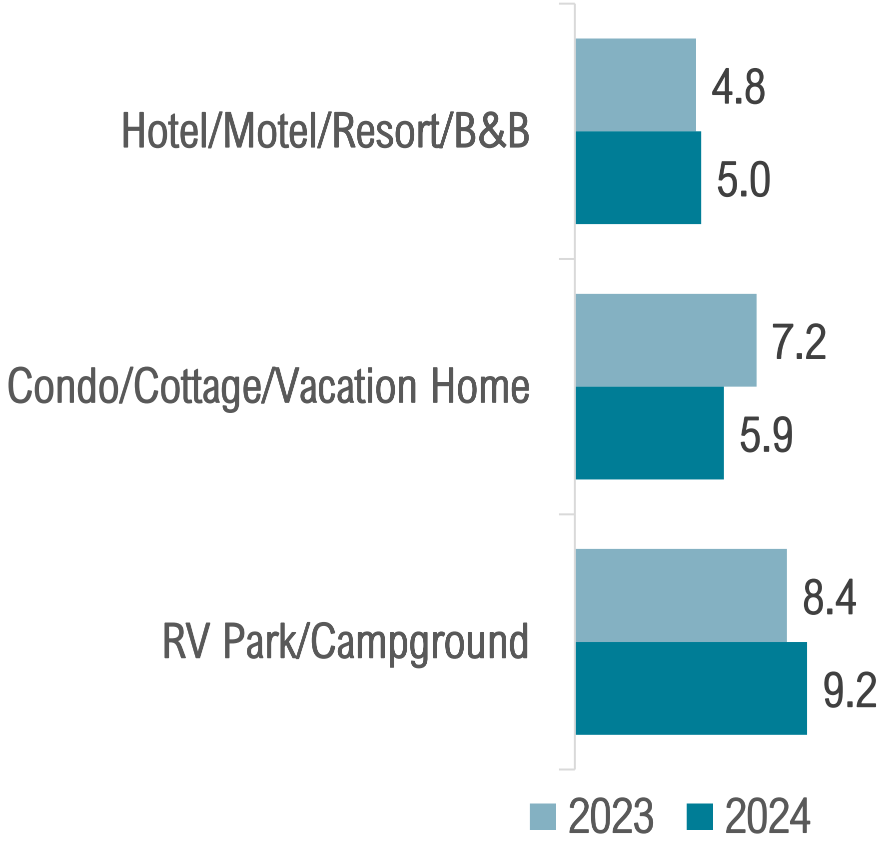
For visitors in paid accommodations, average travel party size in July-September was **3.0 people**[1] (3.0 people in 2023).



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

LENGTH OF STAY

For visitors in paid accommodations, average length of stay in July-September was **5.7 nights**[1] (5.5 nights in 2023).



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

Visitor Journey: Pre-Visit

Pre-Visit

Travel Party Profile

Trip Experience

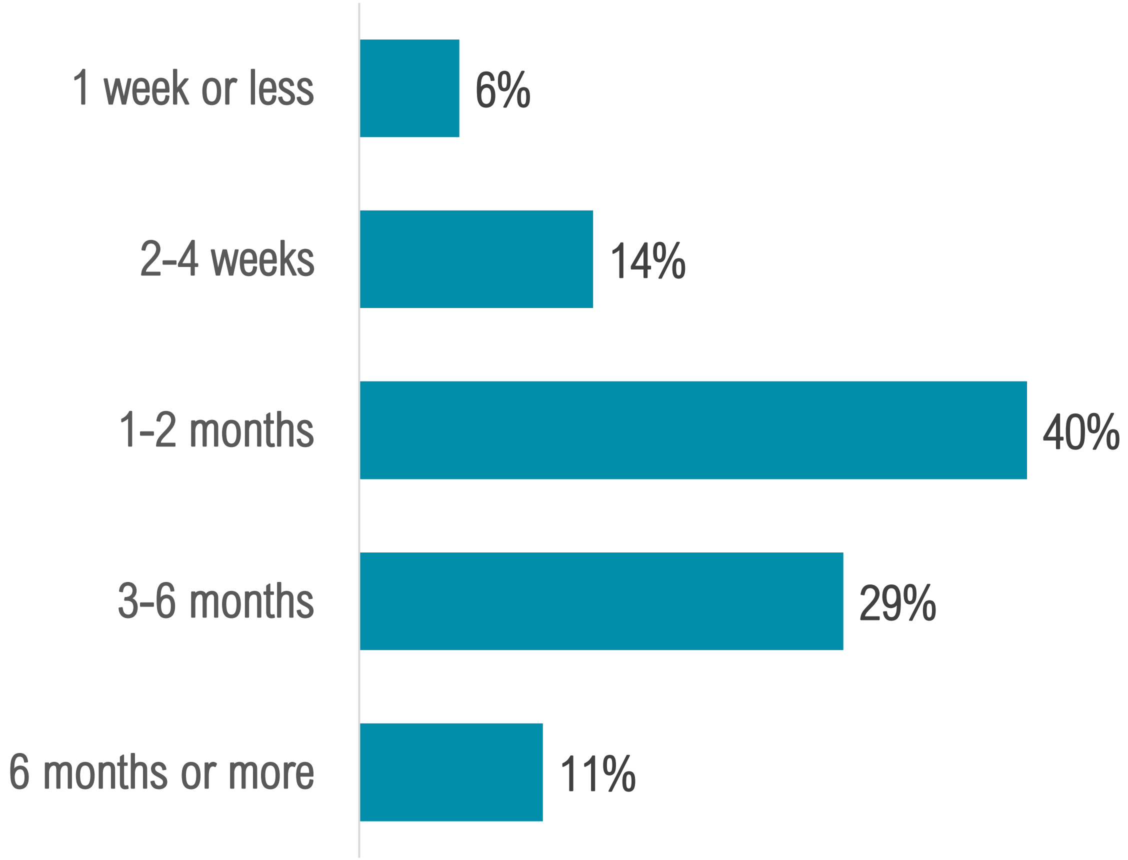
Post-Trip Evaluation

Economic Impact on Destination

TRIP PLANNING CYCLE

2 in 5 visitors planned their trip 1-2 months in advance, while nearly 3 in 10 visitors planned their trip 3-6 months in advance.

The median trip planning cycle lasted nearly 2 months (53 days).

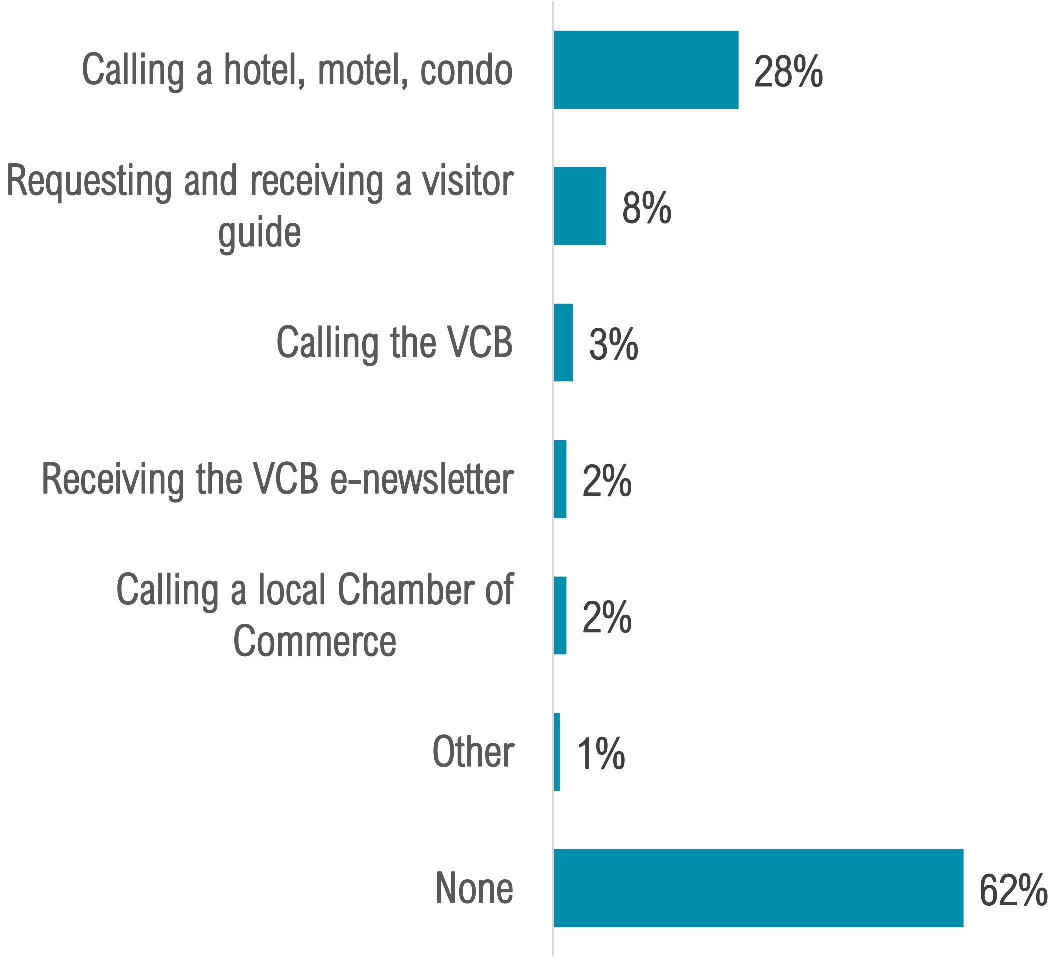


TRIP PLANNING: INFORMATION REQUESTS[1]

Nearly 2 in 5 visitors made **information requests** while planning their trip to the Fort Myers area.

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

The share of visitors requesting information in Q3 2024 was 5% lower than in Q3 2023.



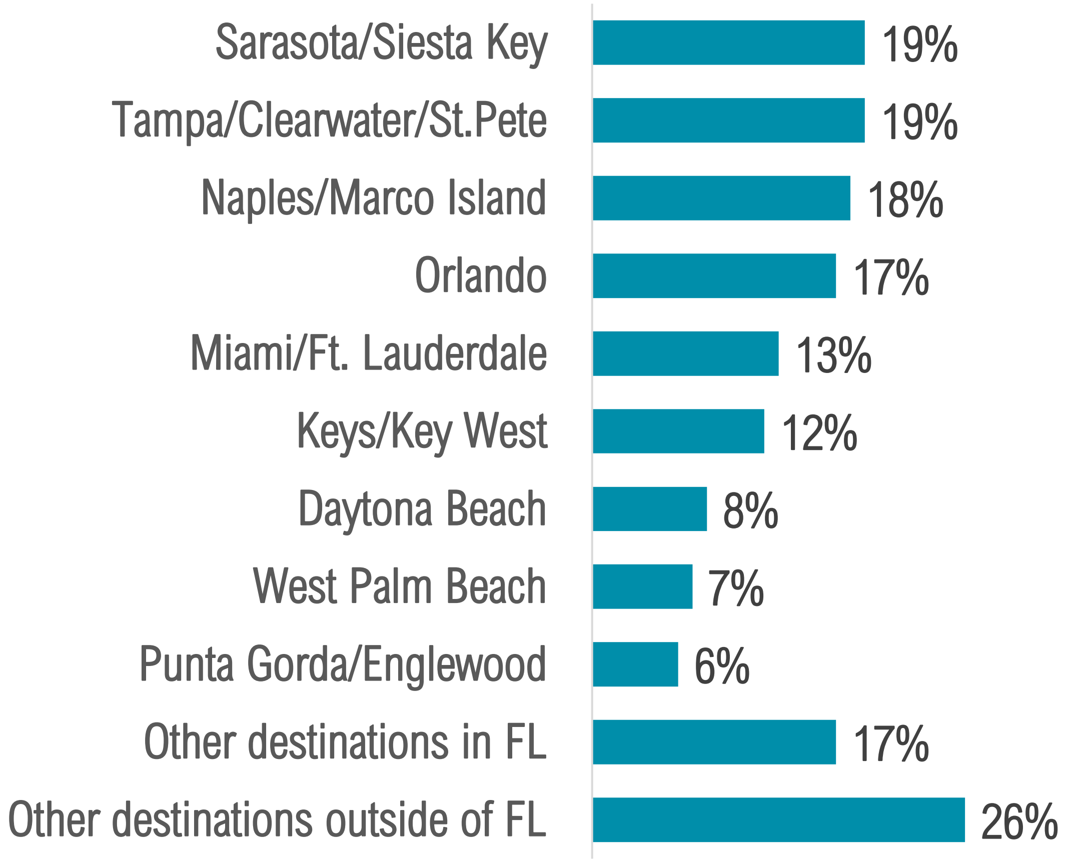
[1]Multiple responses permitted.

TRIP PLANNING: OTHER DESTINATIONS CONSIDERED[1]

Most alternate destinations considered were in Florida.

Nearly 1 in 5 visitors considered visiting the Sarasota/Siesta Key or Tampa/Clearwater/St. Pete areas.

BASE: 38% of visitors who considered other destinations



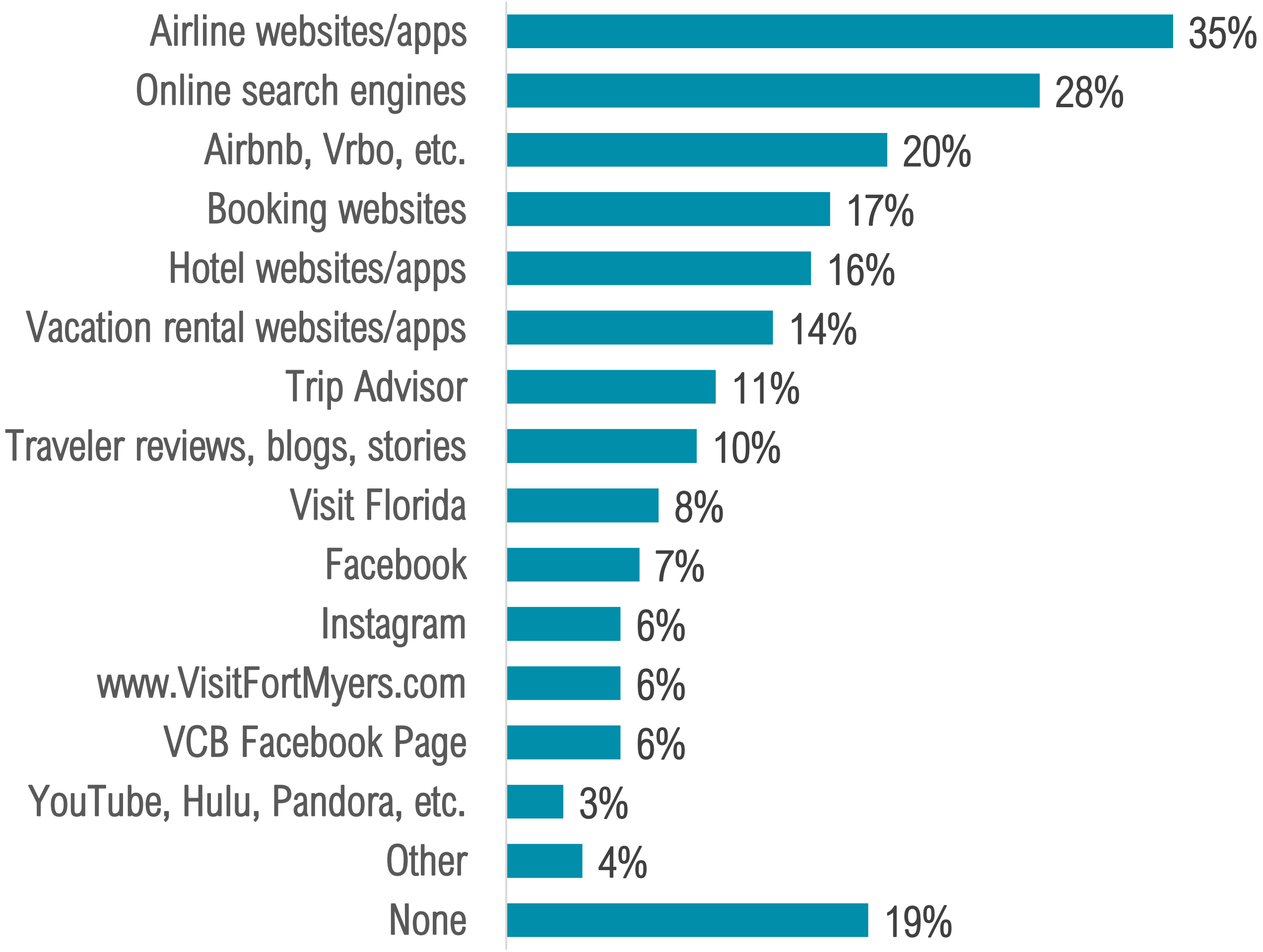
[1]Multiple responses permitted.

TRIP PLANNING: WEBSITES/APPS USED[1]

Over 4 in 5 visitors used **websites and apps** to plan their trip to the Fort Myers area.

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

Visitors also utilized **Airbnb & Vrbo (20%), booking websites/apps (17%),** and **hotel websites/apps (16%)** to plan their trips.

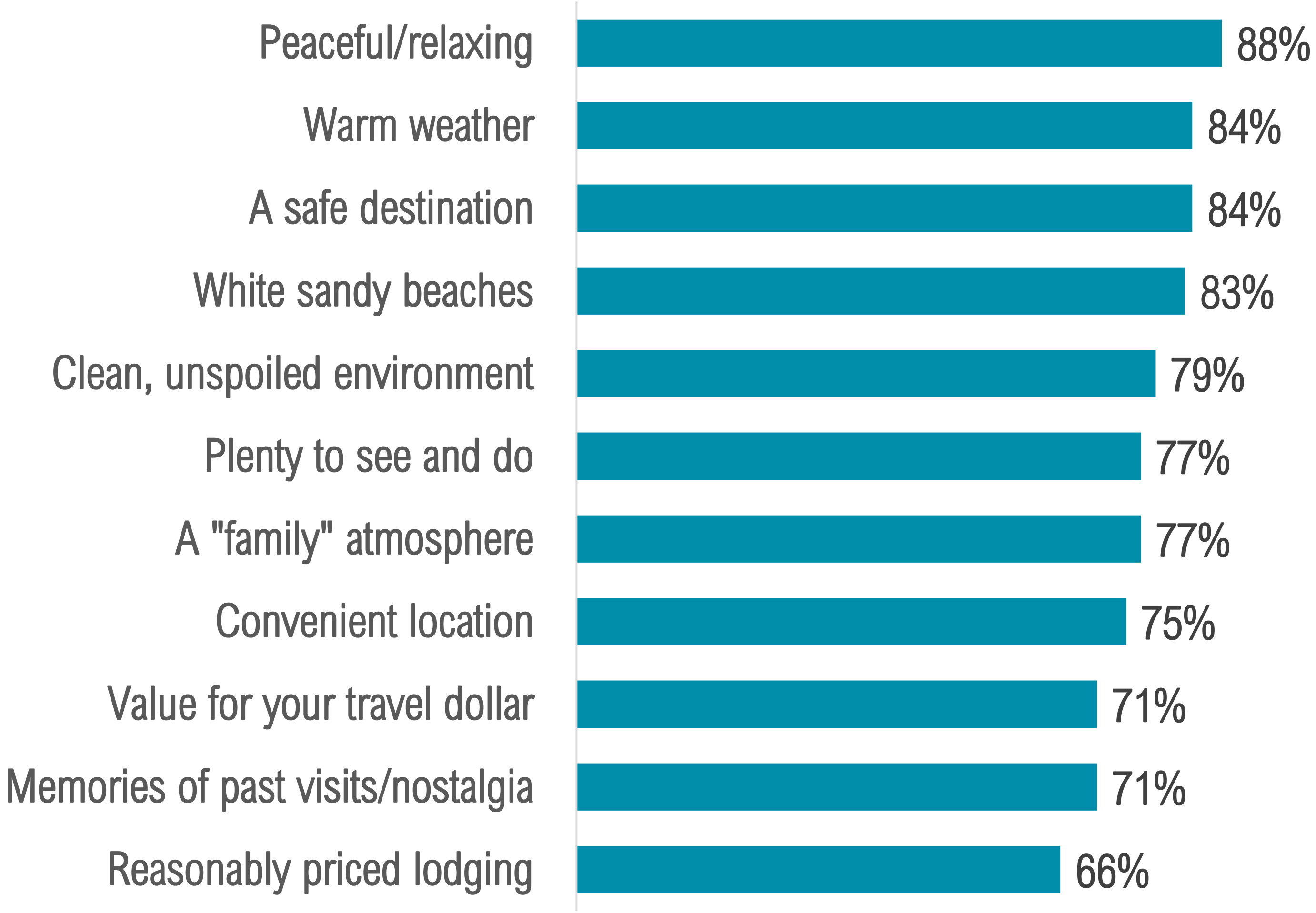


[1]Multiple responses permitted.

TRIP INFLUENCERS[1]

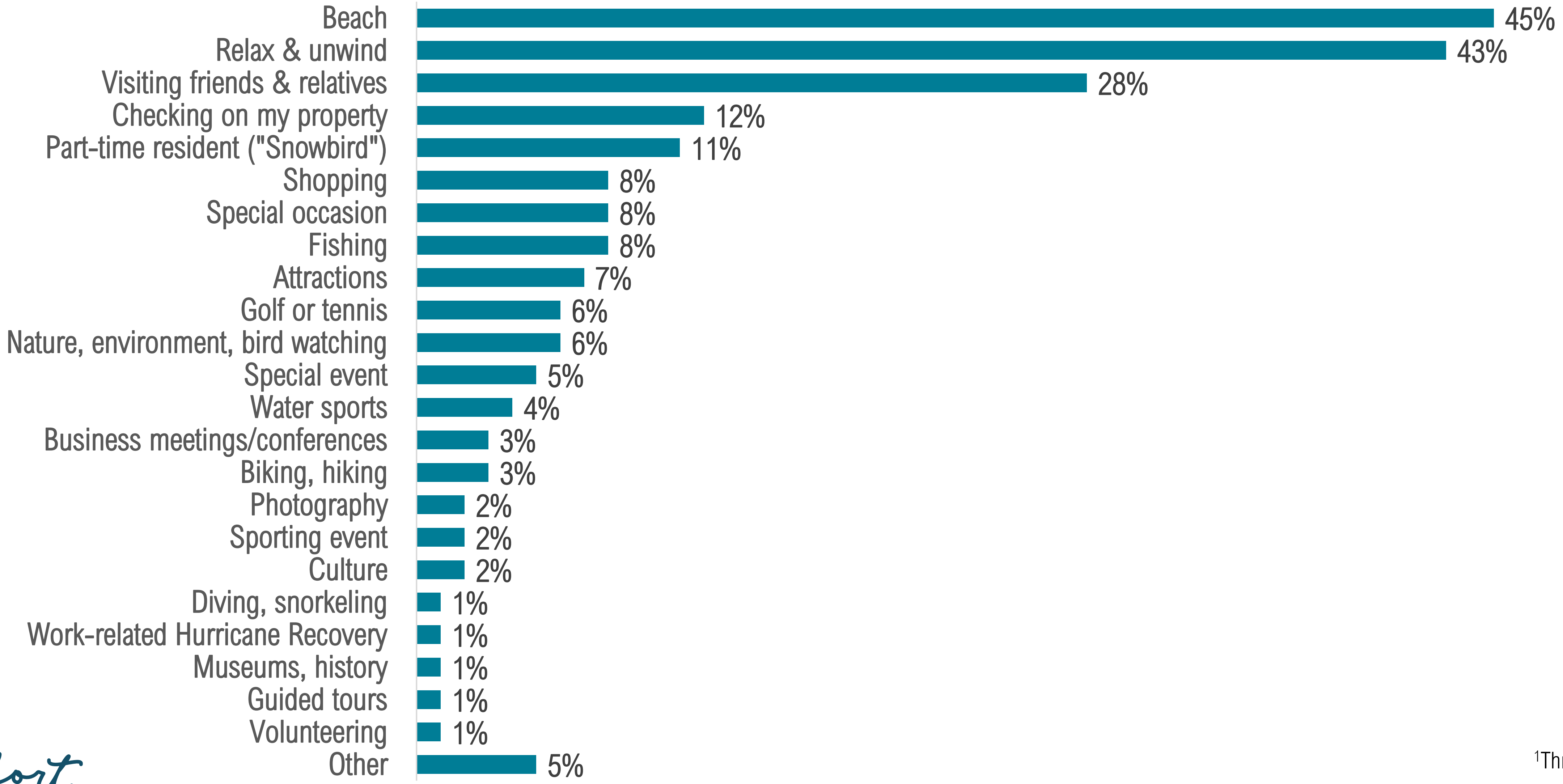
Visitors were heavily influenced by the **peacefulness, warm weather, safety,** and **white sandy beaches** in the Fort Myers area when thinking about visiting.

All trip influencing factors saw slight year-over-year decreases in their top two box scores.



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

REASON FOR VISITING[1]



[1]Three responses permitted.

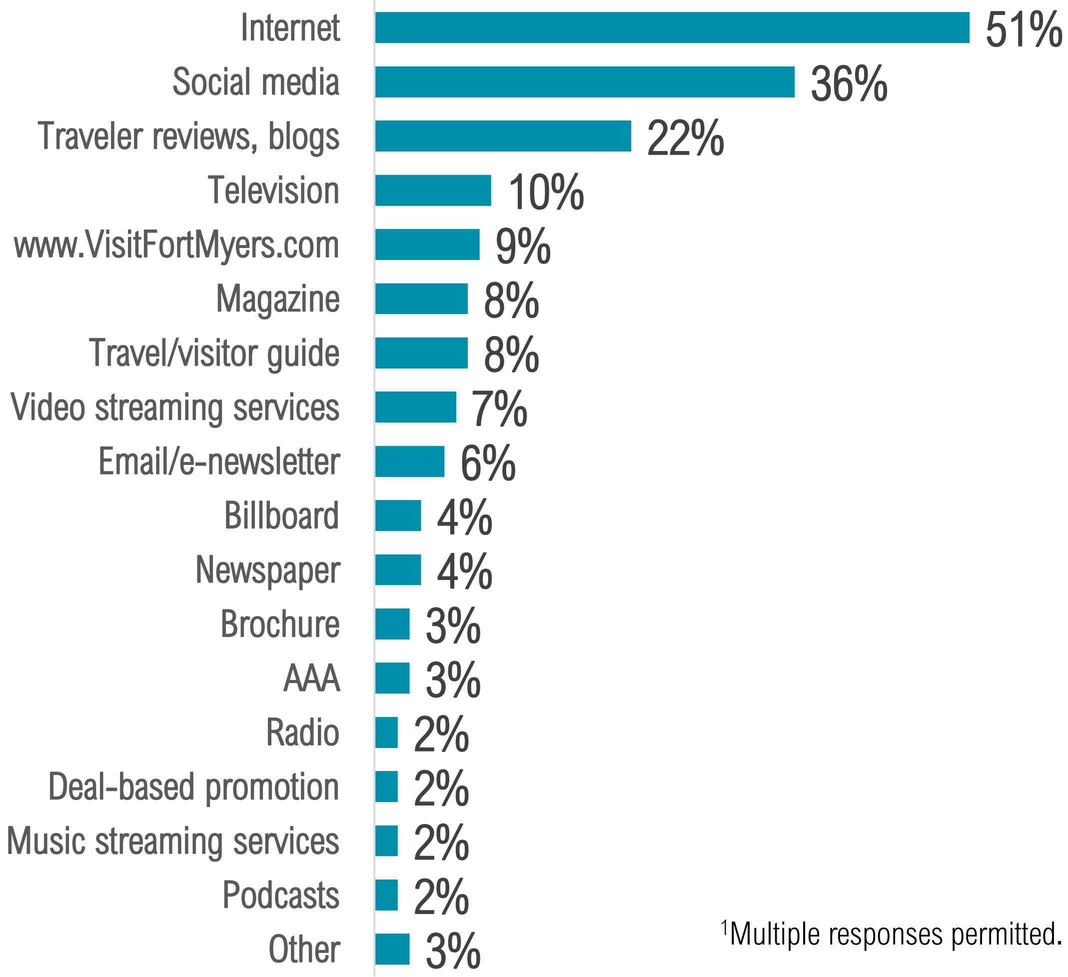
PROMOTIONS RECALL[1]

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

This influenced 18% of all visitors to come to the Fort Myers area.

BASE: 38% of visitors who recalled promotions

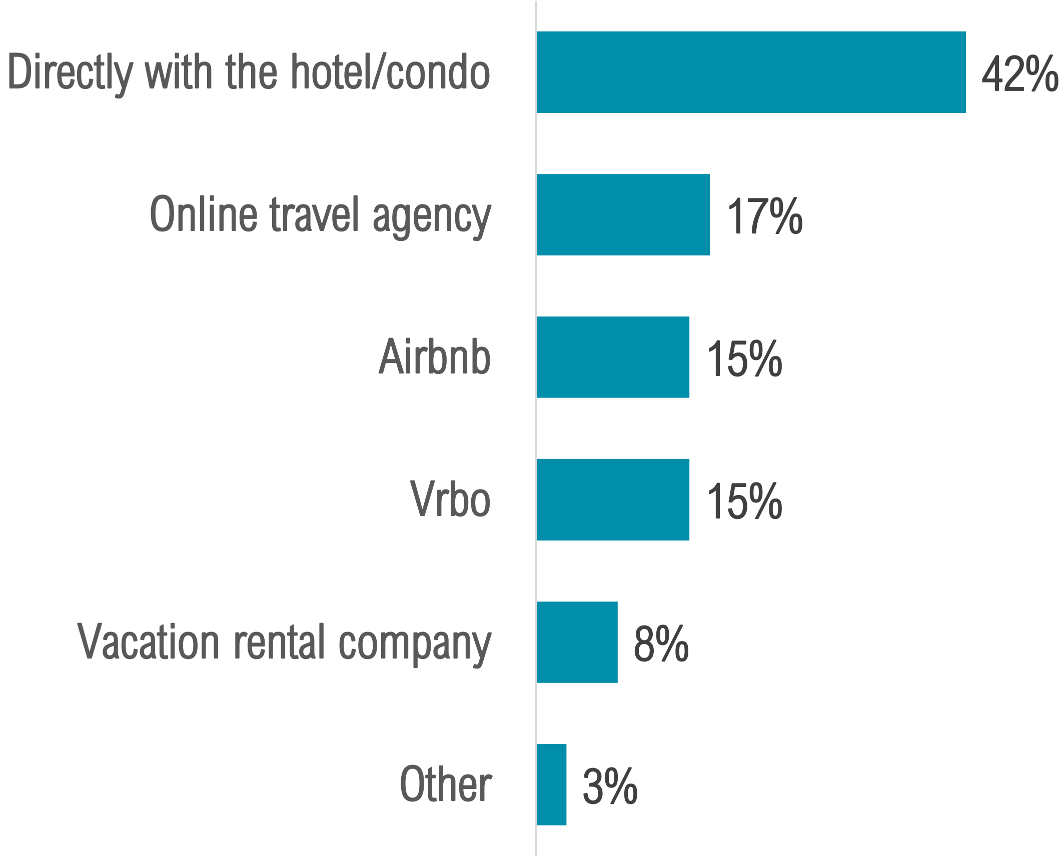
Source of Promotion



[1]Multiple responses permitted.

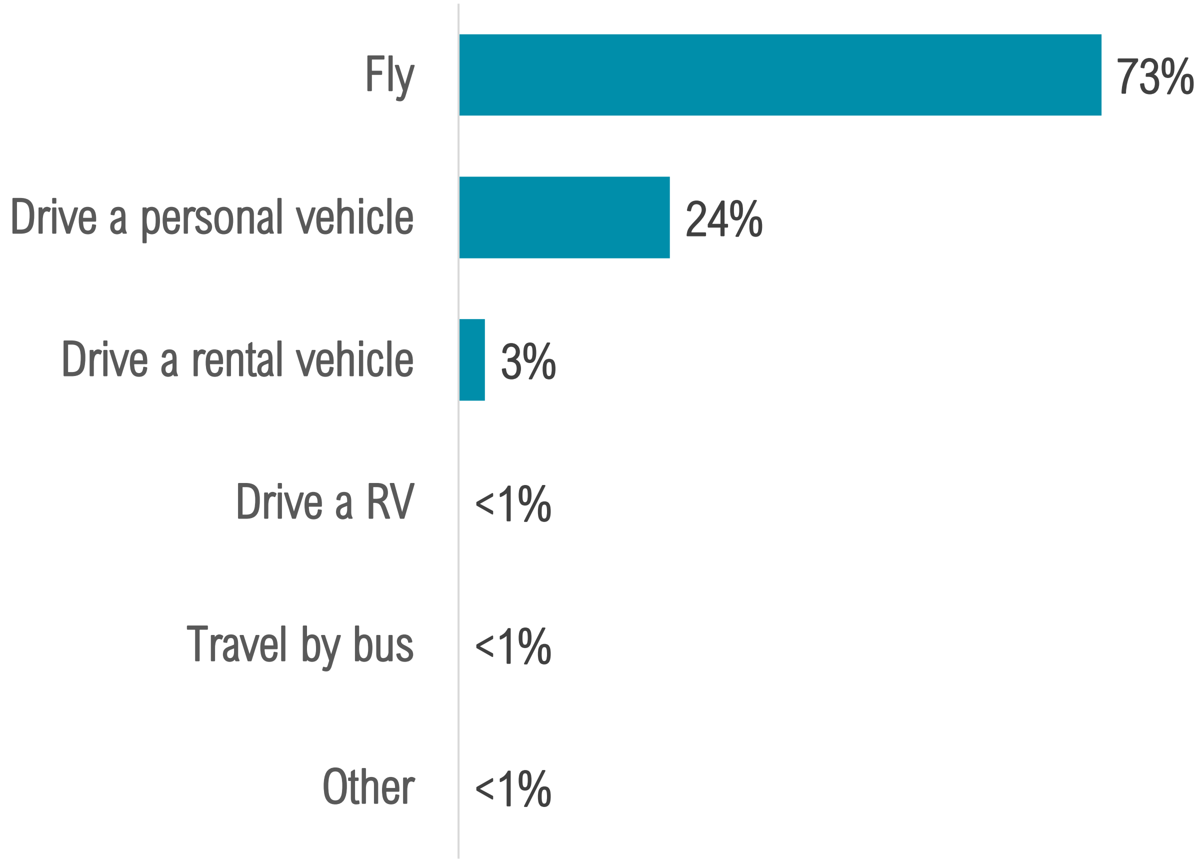
BOOKING

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



TRANSPORTATION

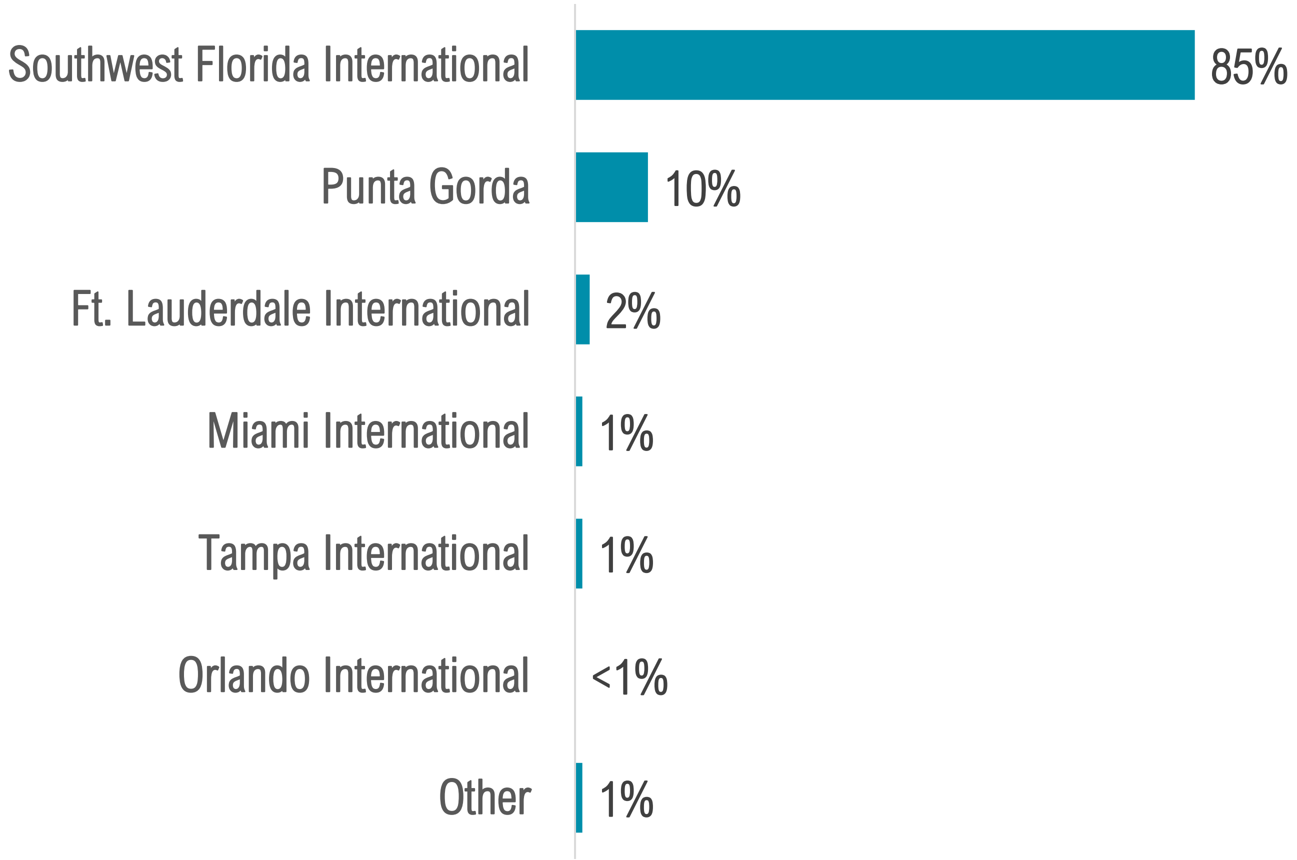
Over 3 in 4 visitors flew to the Fort Myers area.



AIRPORT

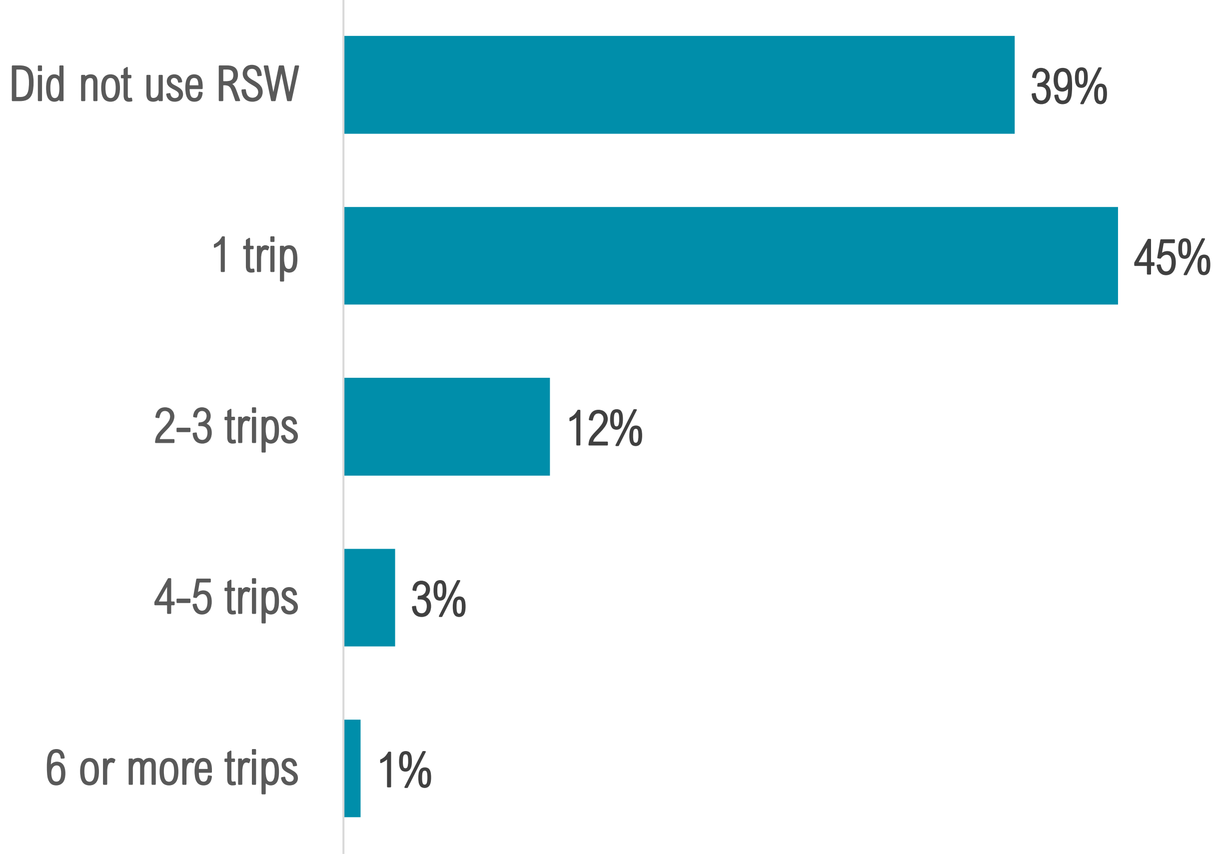
Over 4 in 5 visitors who flew to the Fort Myers area came through RSW.

BASE: 73% of visitors who flew



USE OF RSW IN THE PAST YEAR

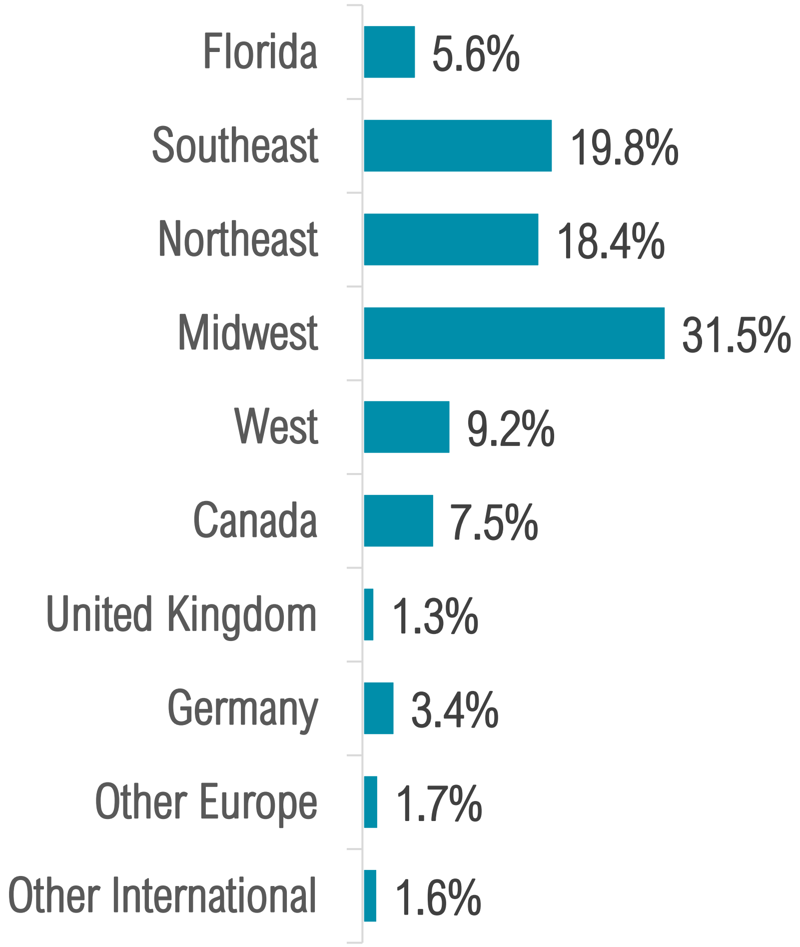
61% of visitors used RSW at least once in the past year.

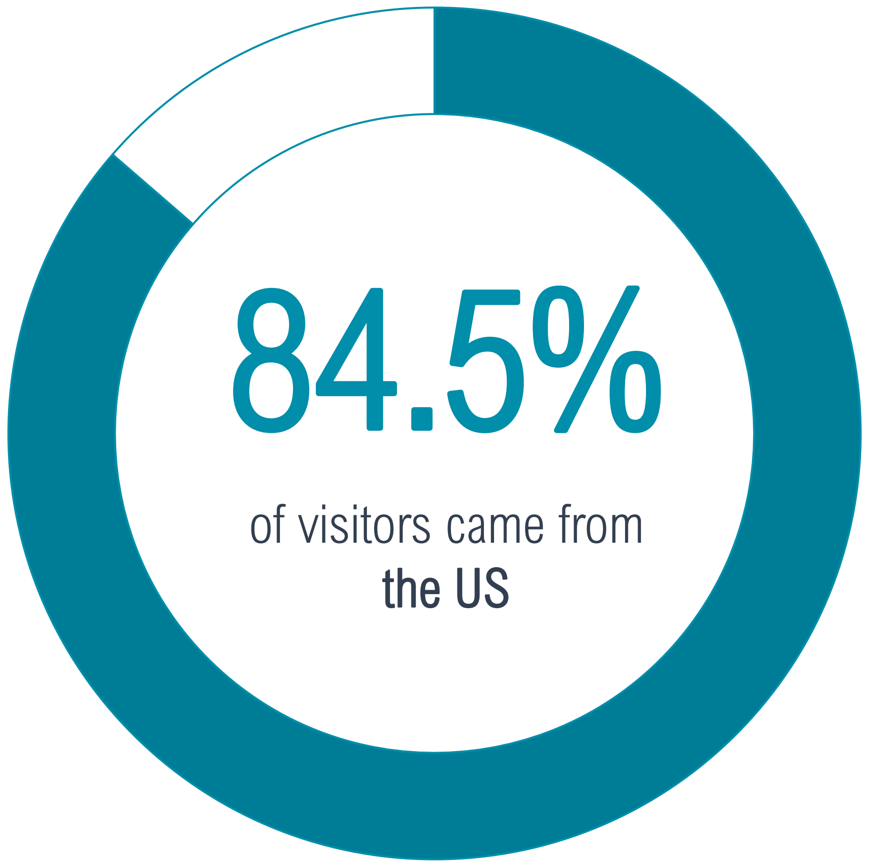


VISITOR JOURNEY: TRAVEL PARTY PROFILE

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

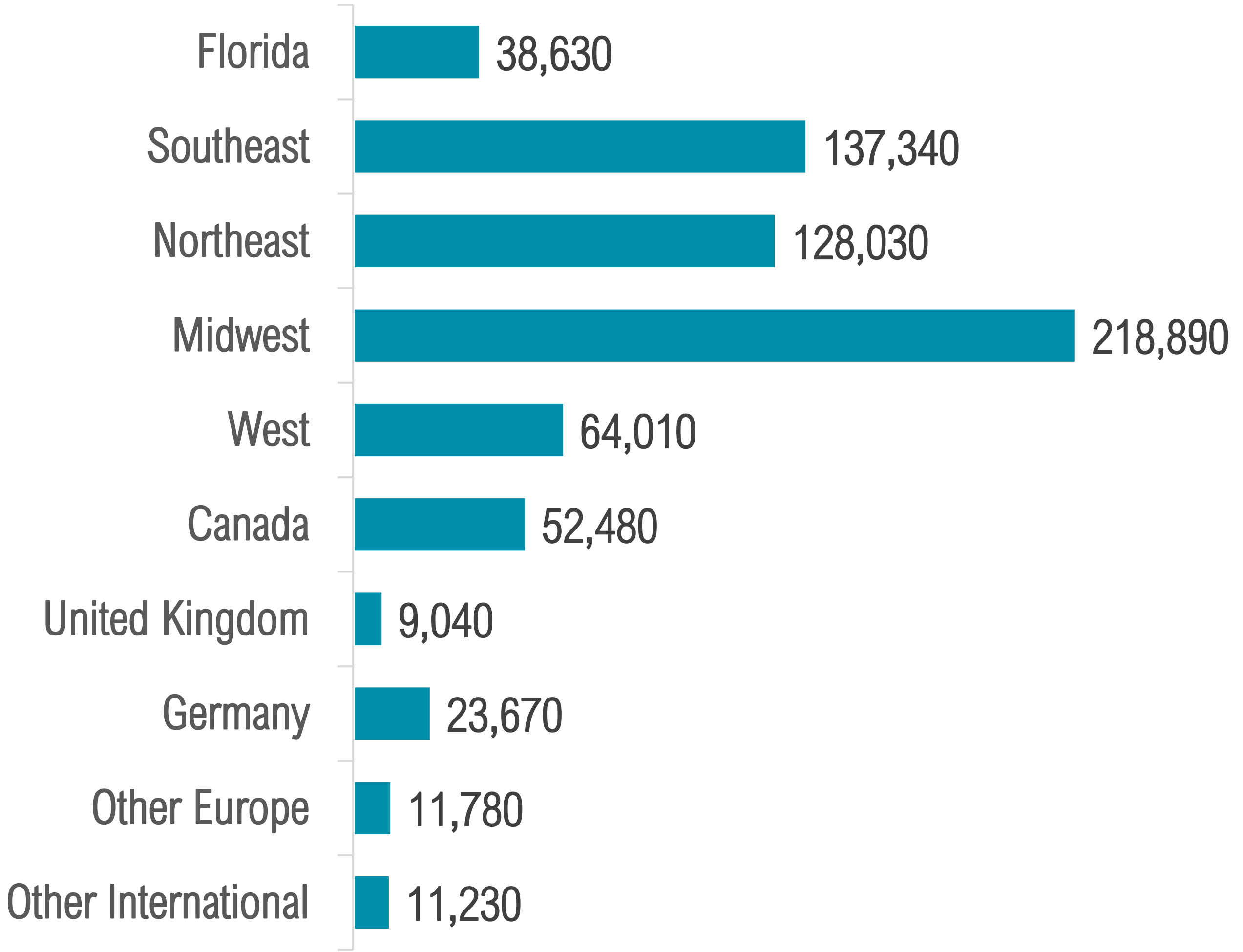
ORIGIN[1]





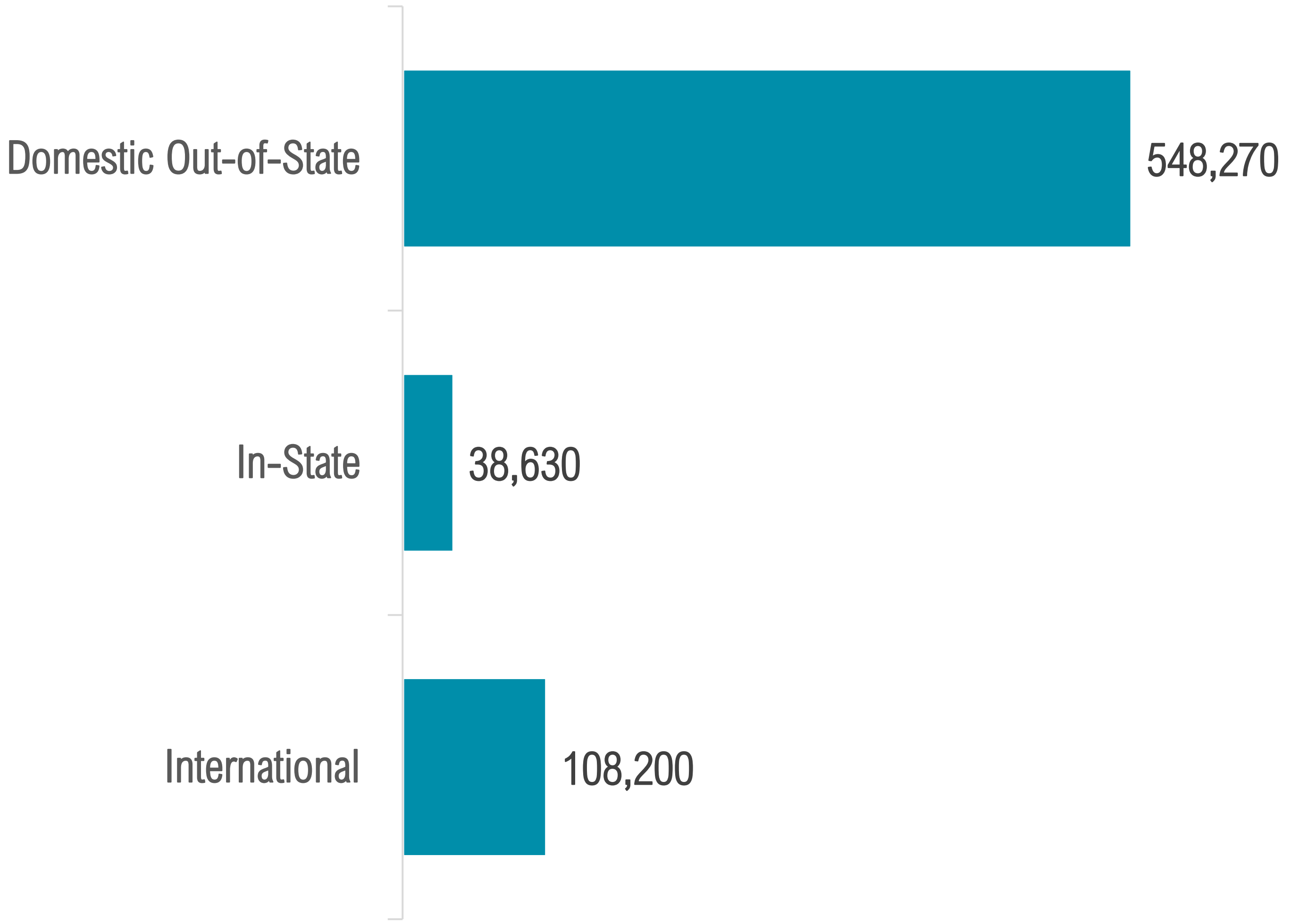
[1] Includes visitors who stayed in paid accommodations, VFRs, and day trippers. Based on data from the Visitor Tracking Study.

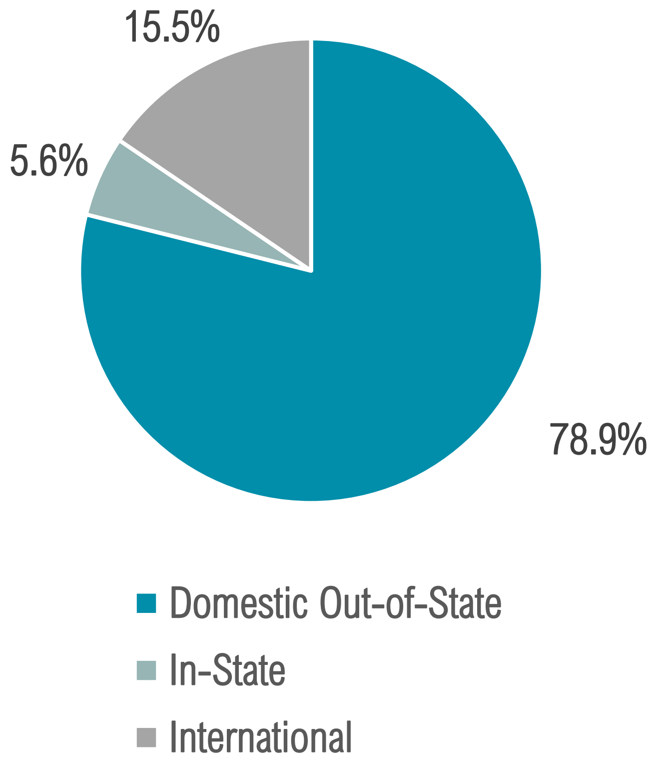
NUMBER OF VISITORS BY ORIGIN[1]



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

NUMBER OF VISITORS BY ORIGIN



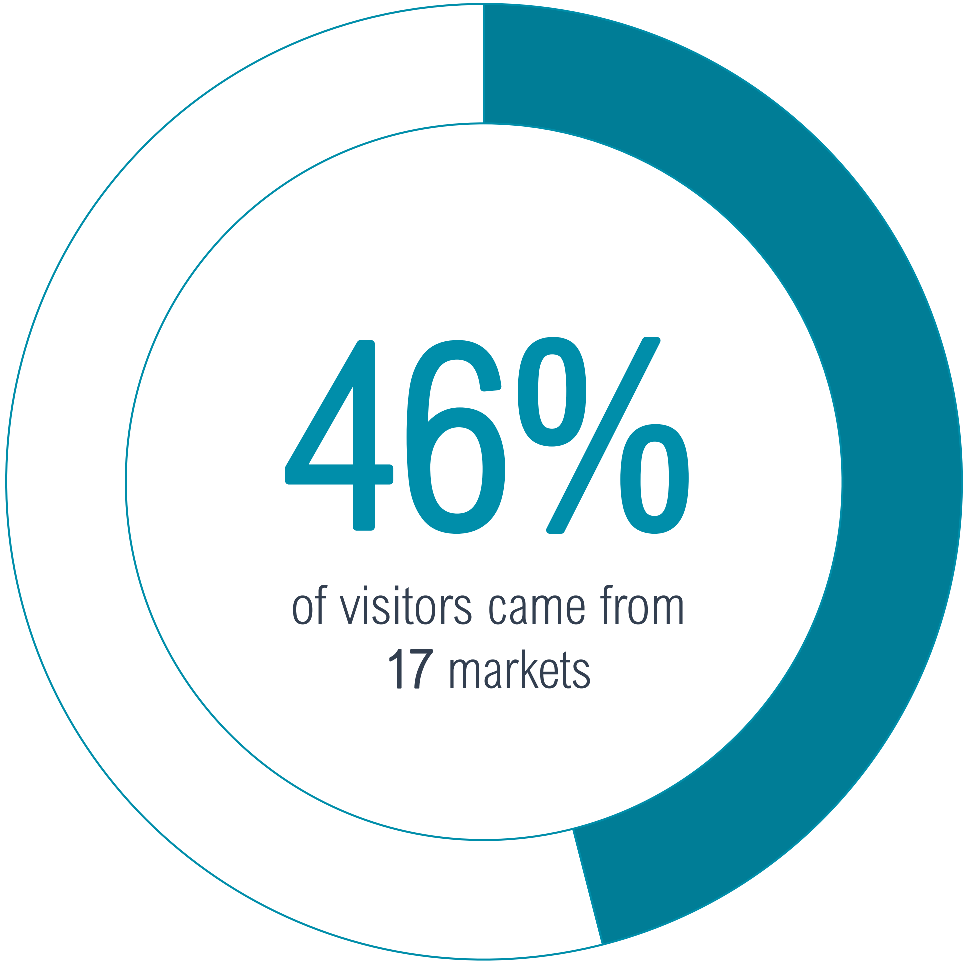


[1]Includes visitors who stayed in paid accommodations, VFRs, and day trippers. Based on data from the Visitor Tracking Study.

ORIGIN MARKETS[1]

Market [2]	Percentage of Visitors
New York	6%
Chicago	5%
Atlanta	4%
Cleveland - Akron	3%
Minneapolis - Saint Paul	3%
Detroit	3%
Denver	2%
Washington, DC - Hagerstown	2%
Philadelphia	2%
Indianapolis	2%
Cincinnati	2%
Dallas - Fort Worth	2%
Kansas City	2%
Boston	2%
Pittsburgh	2%
Louisville	2%
Houston	2%

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



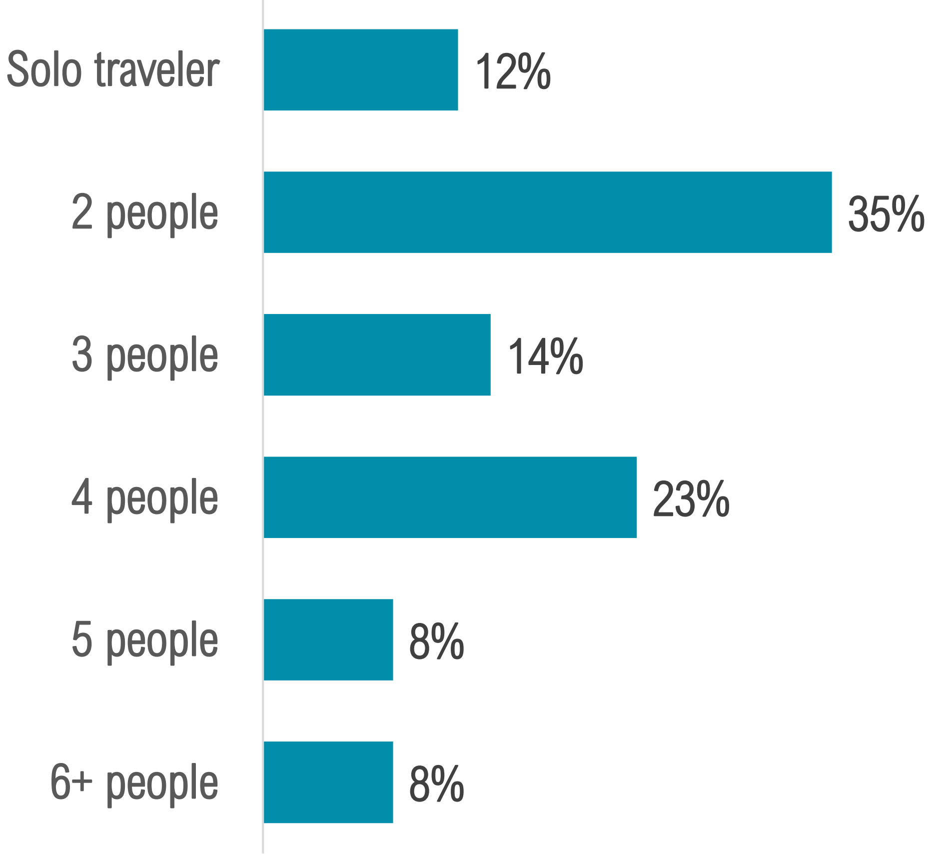
TRAVEL PARTY SIZE AND COMPOSITION

Travel Party Size

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

Travel with Children

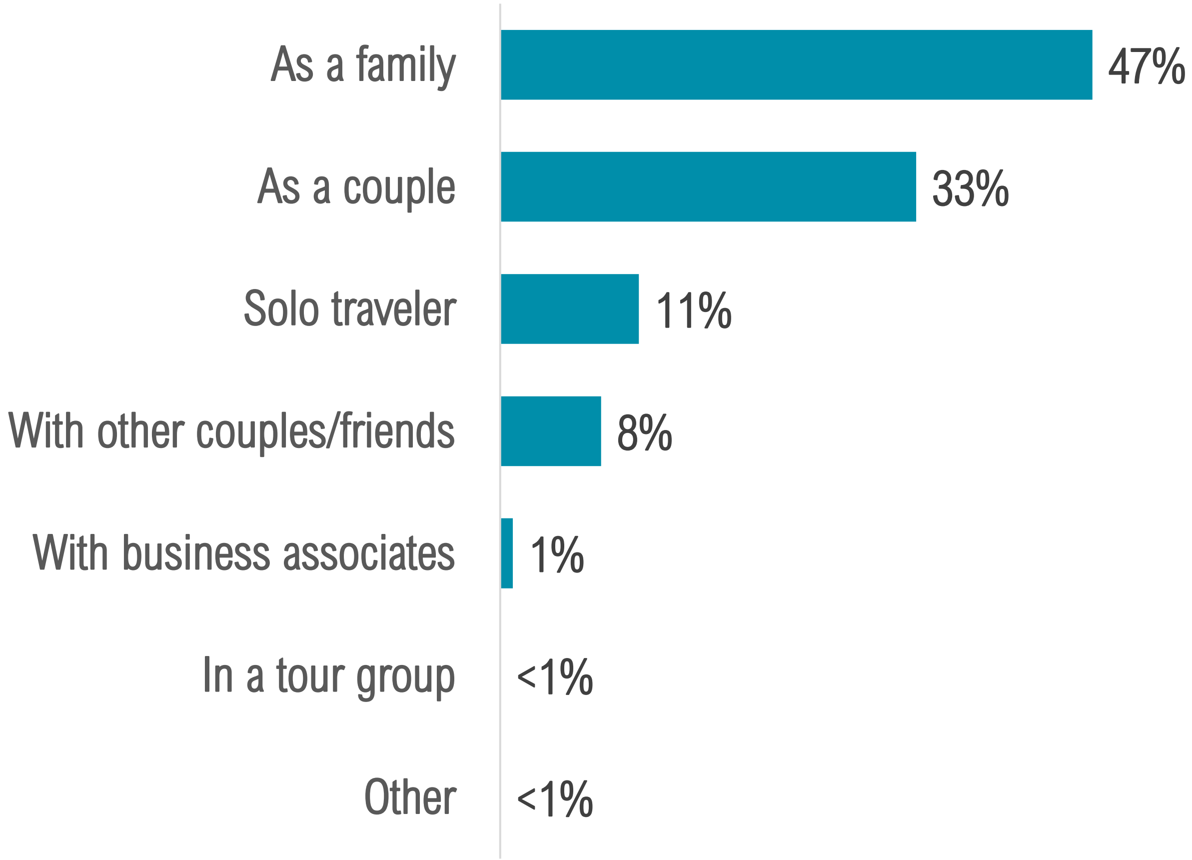
37% of visitors **traveled with children** under the age of 18.



[1]Sources: Occupancy Study and Visitor Tracking Study

TRAVEL PARTY TYPE

4 in 5 visitors traveled either as a family or as a couple, while 11% of visitors traveled alone.



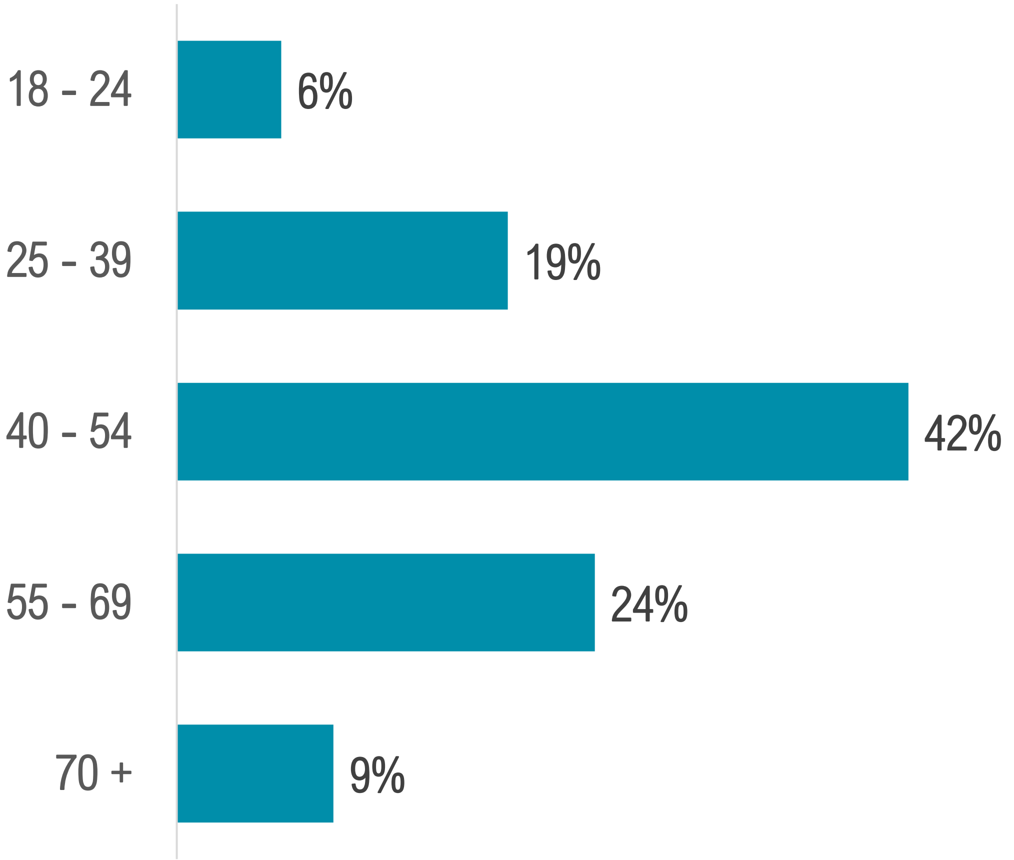
AGE

Average Age

The average age of Jul - Sep visitors was **50 years old.**

Median Age

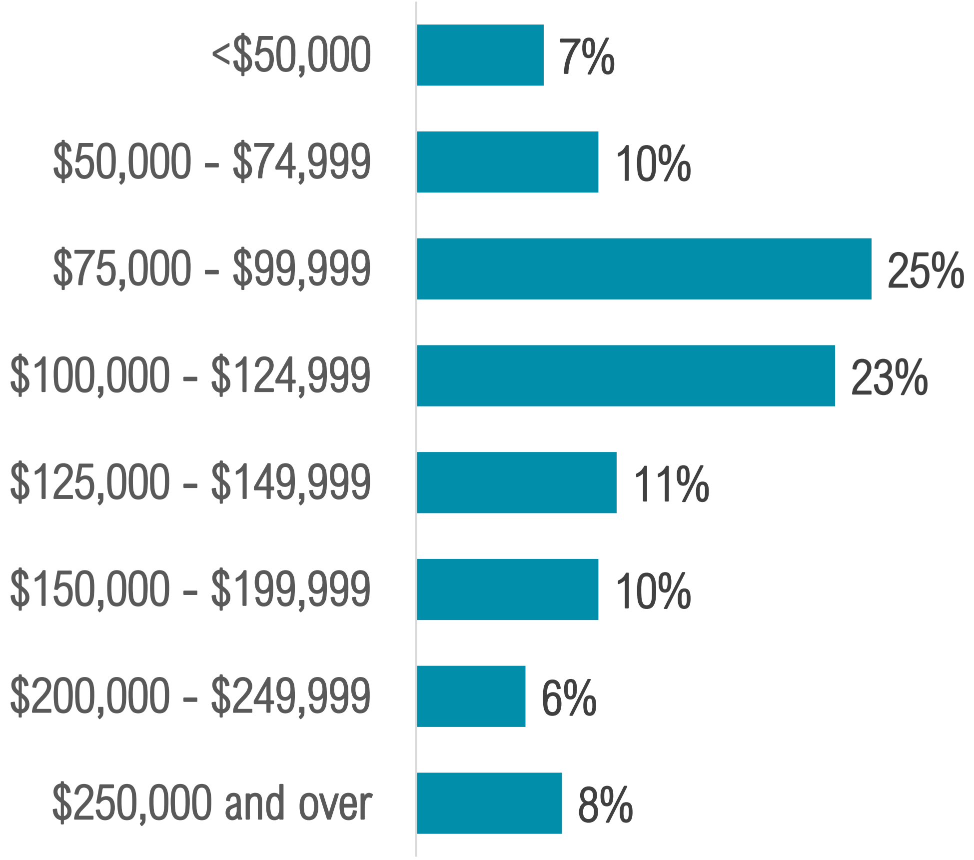
The median age of Jul - Sep visitors was **48 years old.**



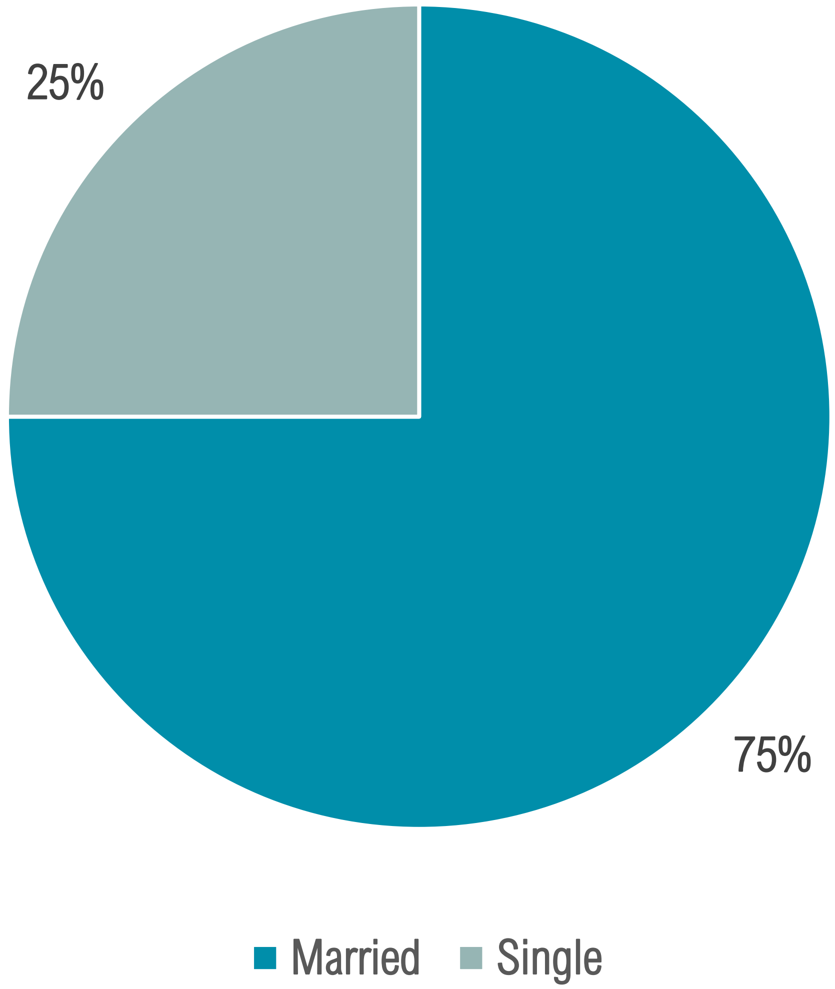
HOUSEHOLD INCOME

Median Household Income
Jul - Sep visitors had a median household income of **$108,700.**

14% of visitors had a household income in excess of **$200,000.**



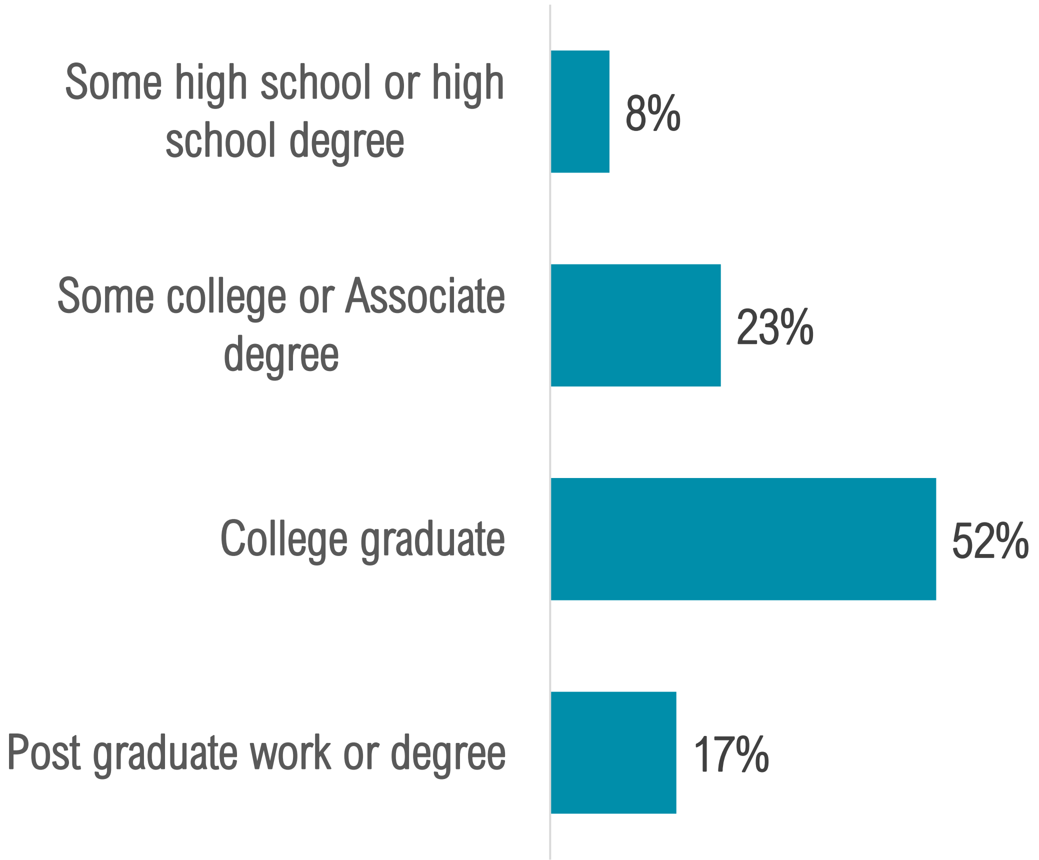
MARITAL STATUS



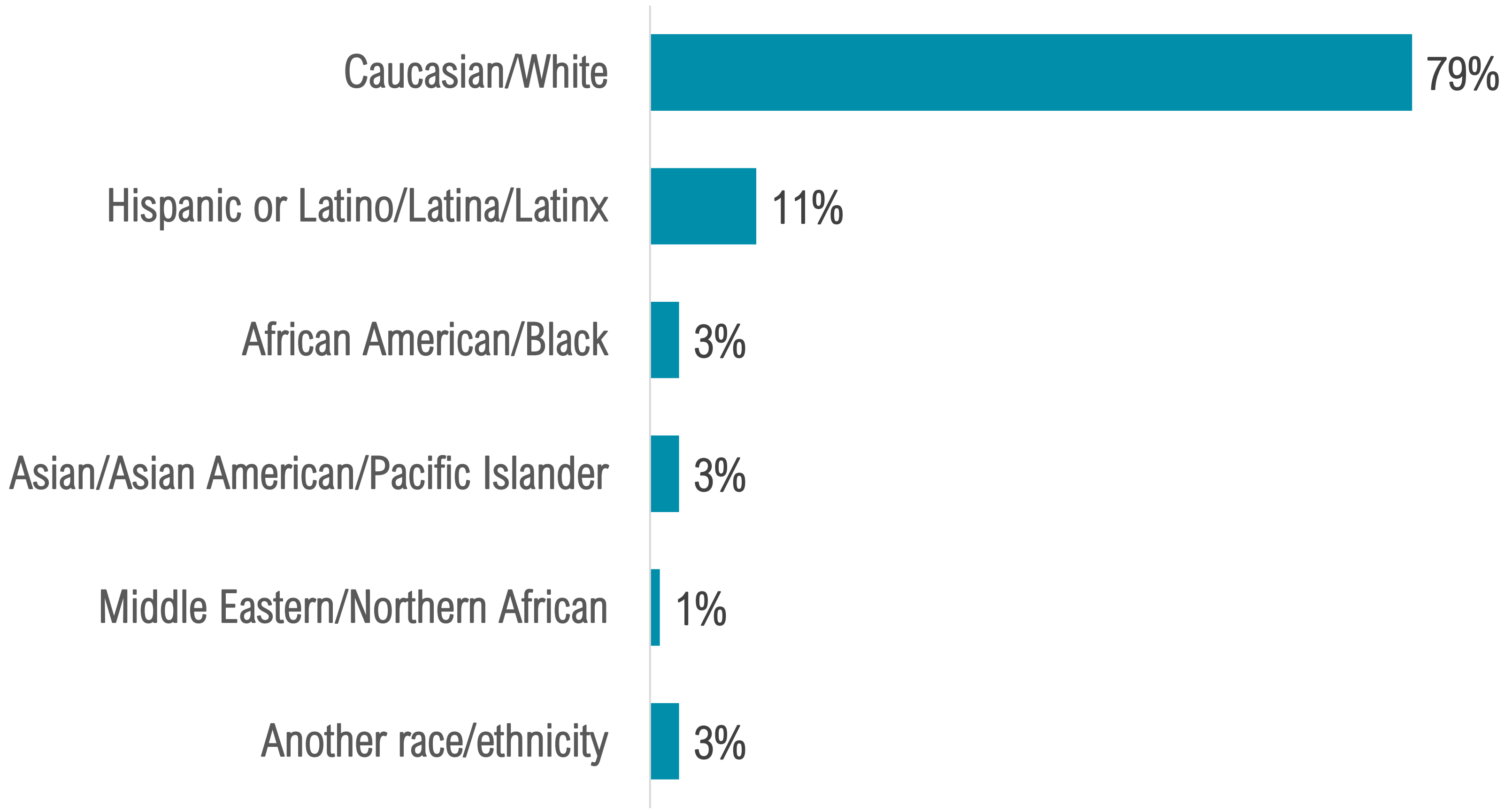
EDUCATION

Education Level

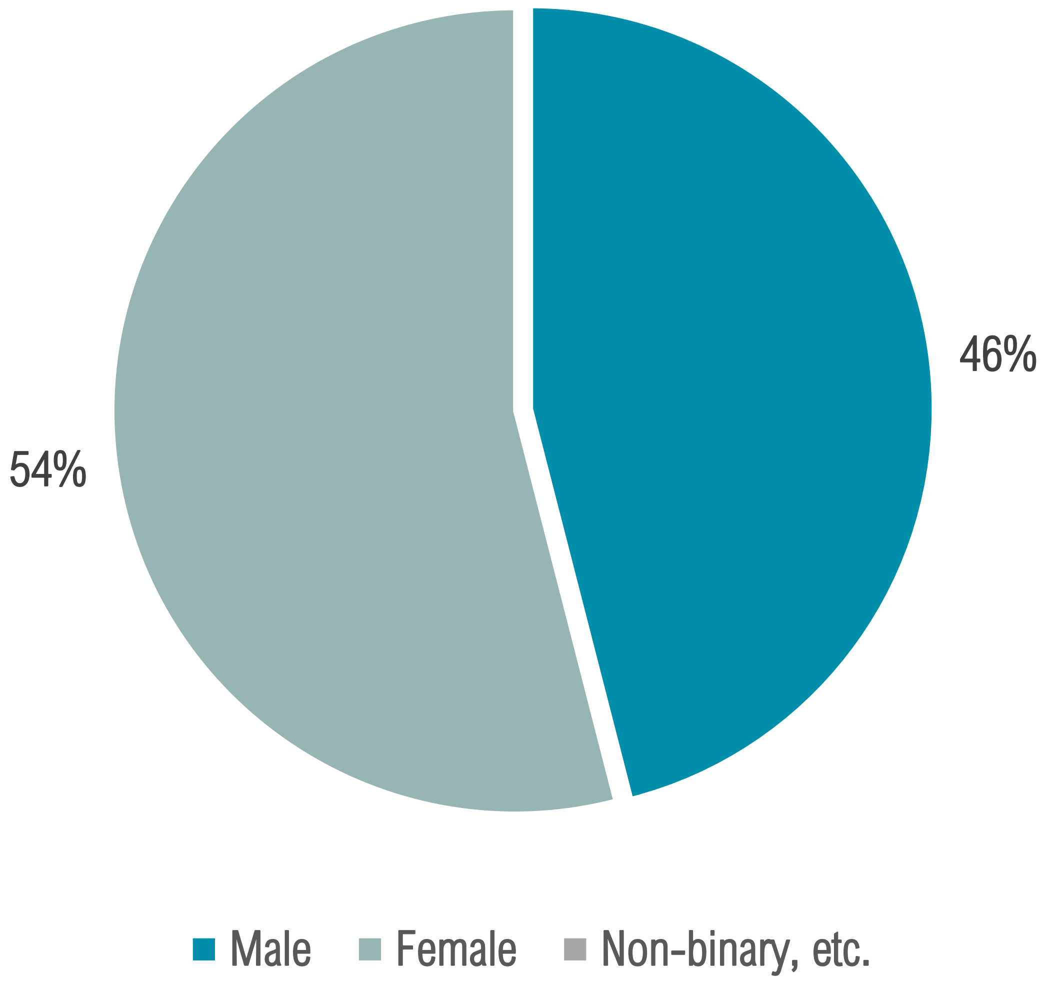
Nearly 7 in 10 of Jul - Sep visitors had achieved a bachelor's degree or higher.



RACE/ETHNICITY



GENDER[1]



[1]Gender of person interviewed.

VISITOR JOURNEY: TRIP EXPERIENCE

Pre-Visit

Travel Party Profile

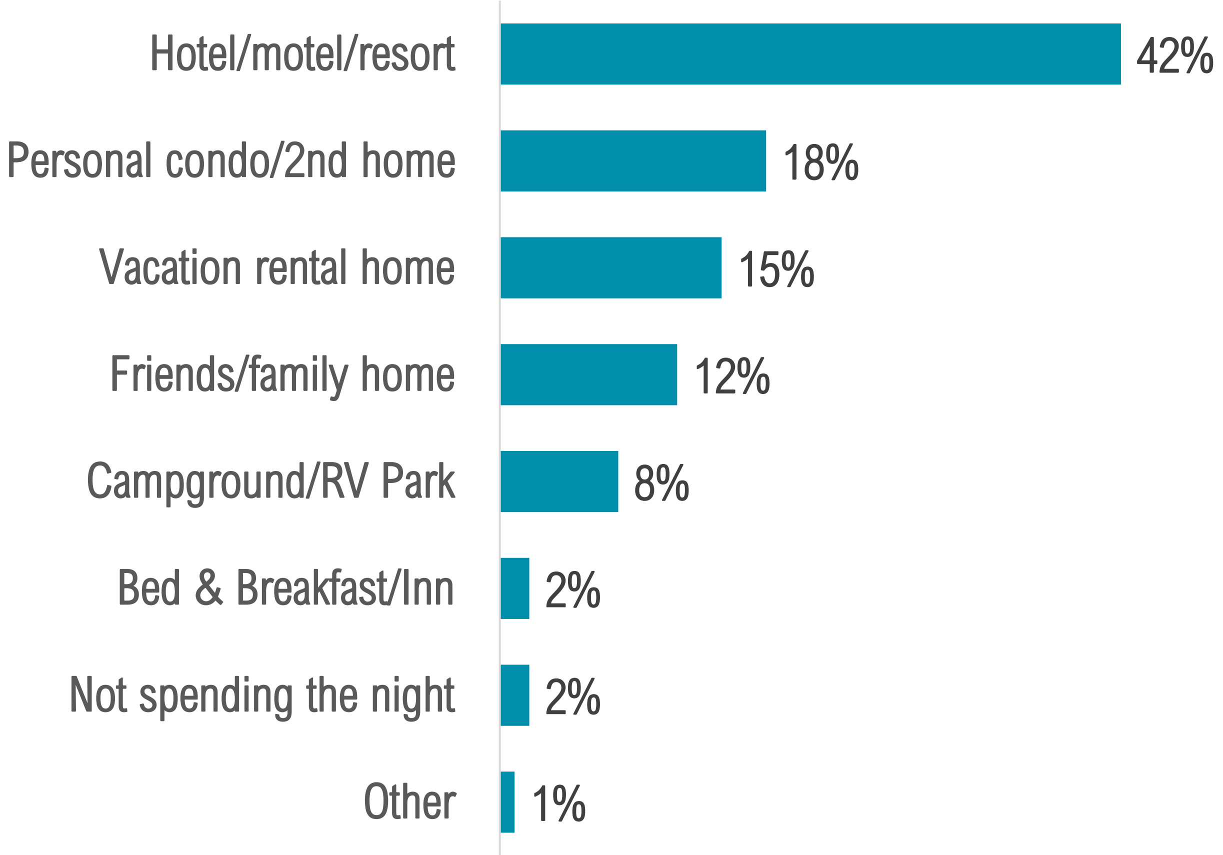
Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

ACCOMMODATIONS

2 in 3 visitors stayed in paid accommodations



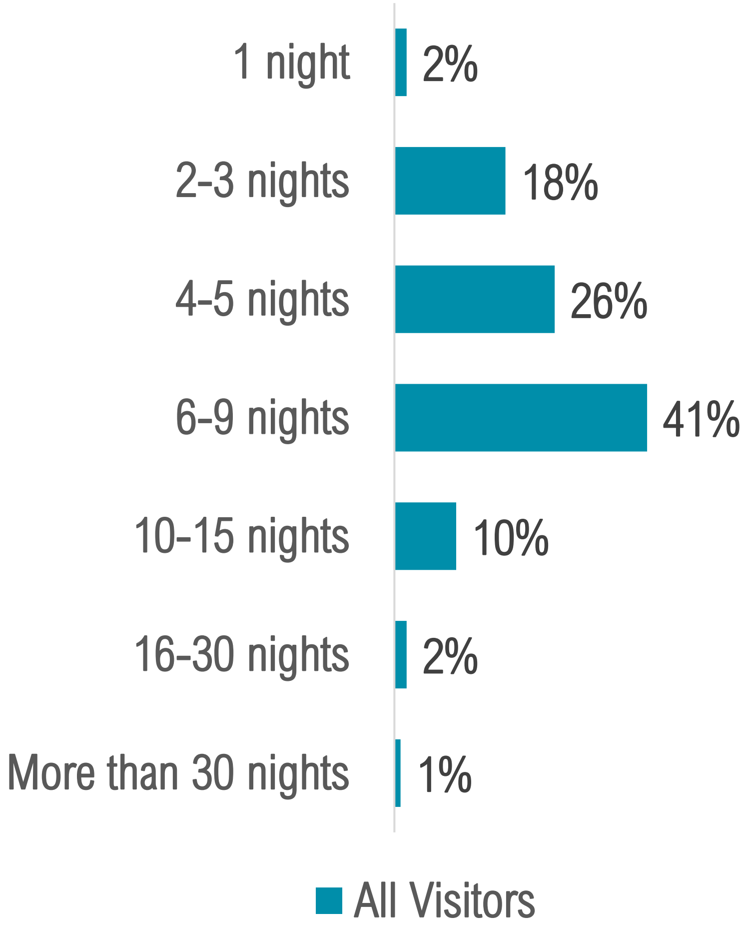
NIGHTS STAYED

All Visitors

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

Visitors Staying in Paid Accommodations

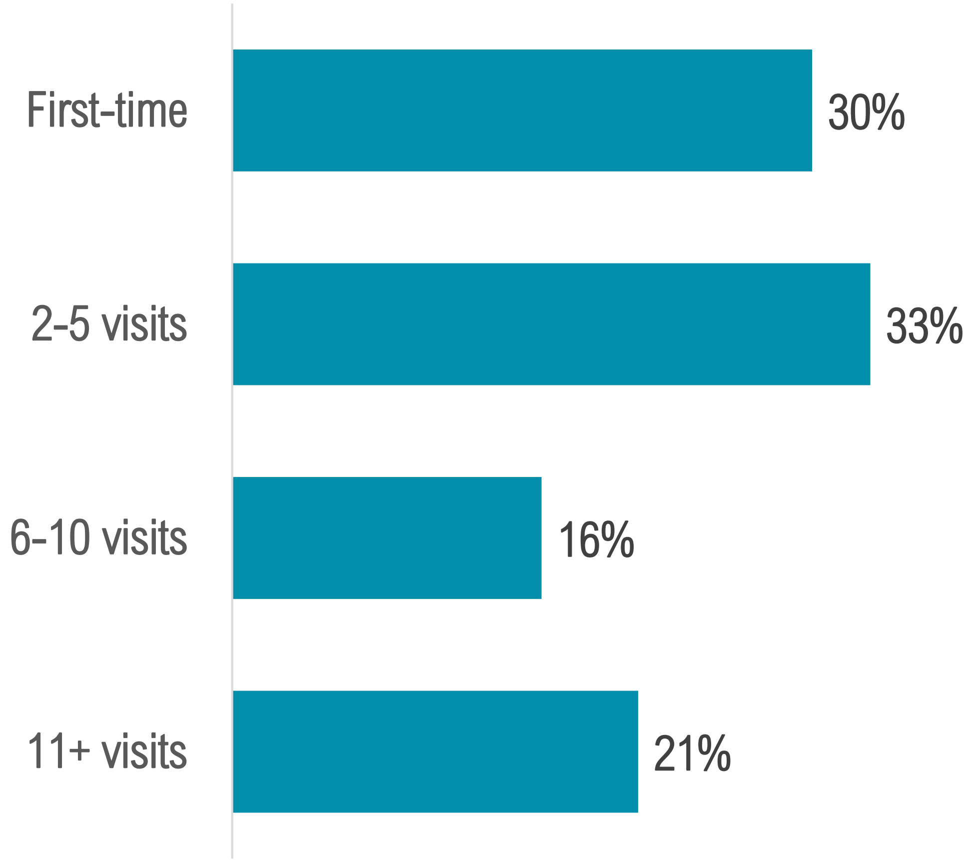
Visitors staying in paid accommodations spent an average of **5.7[2] nights** in the Fort Myers area.



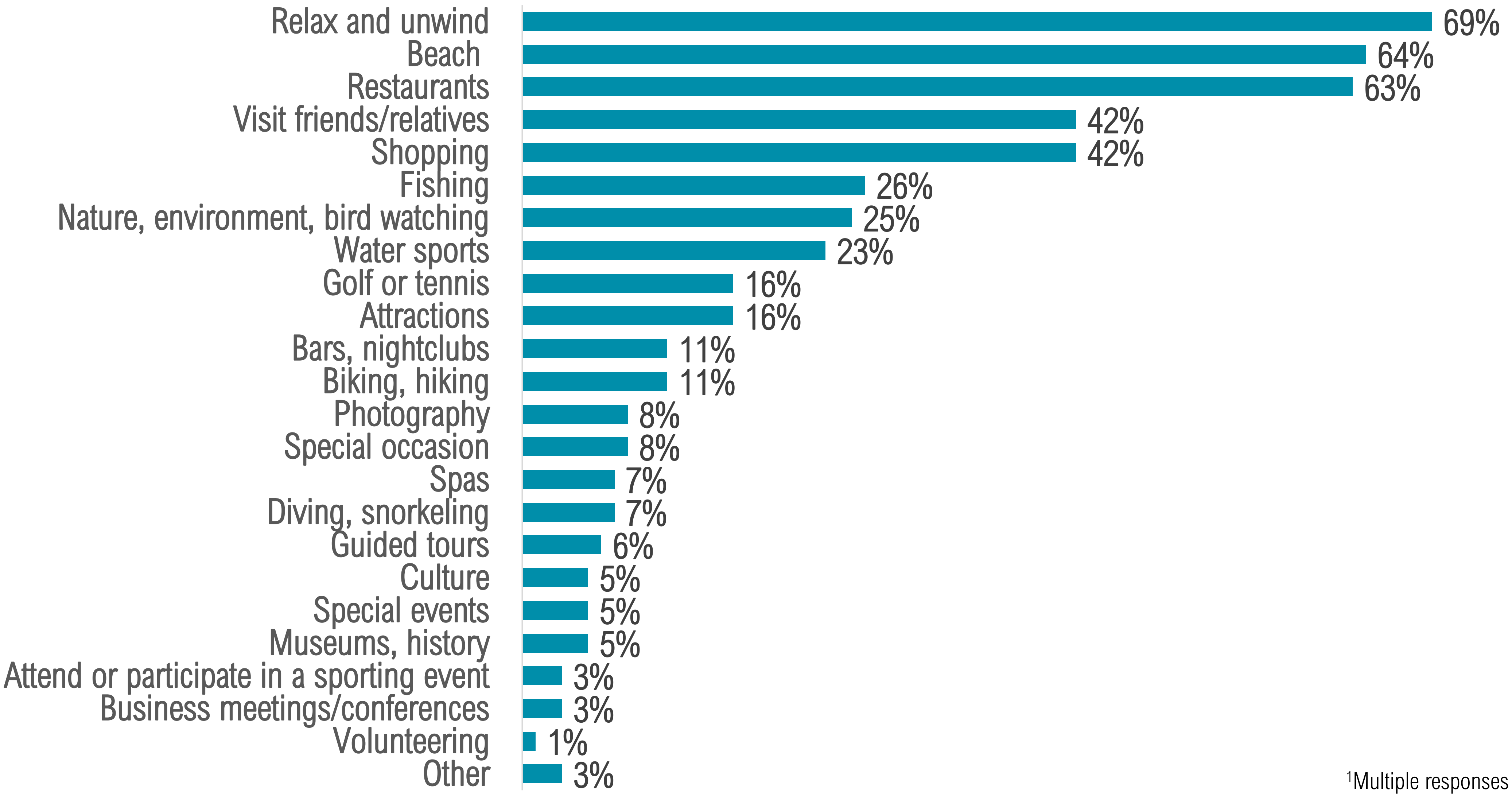
[1]Sources: Occupancy Study and Visitor Tracking Study
[2]Source: Occupancy Study

FIRST TIME AND EXPERIENCED VISITORS

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

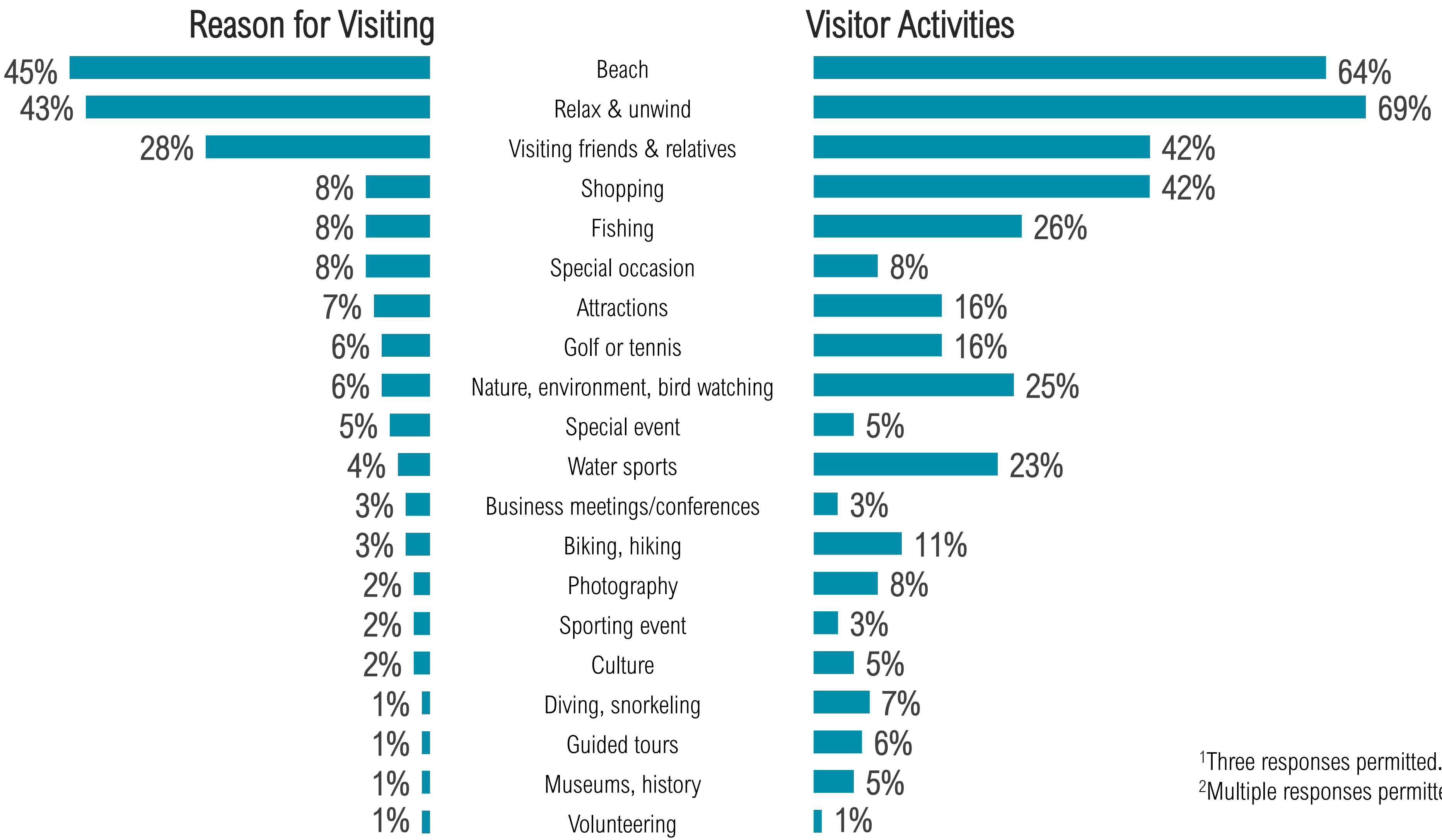


VISITOR ACTIVITIES[1]



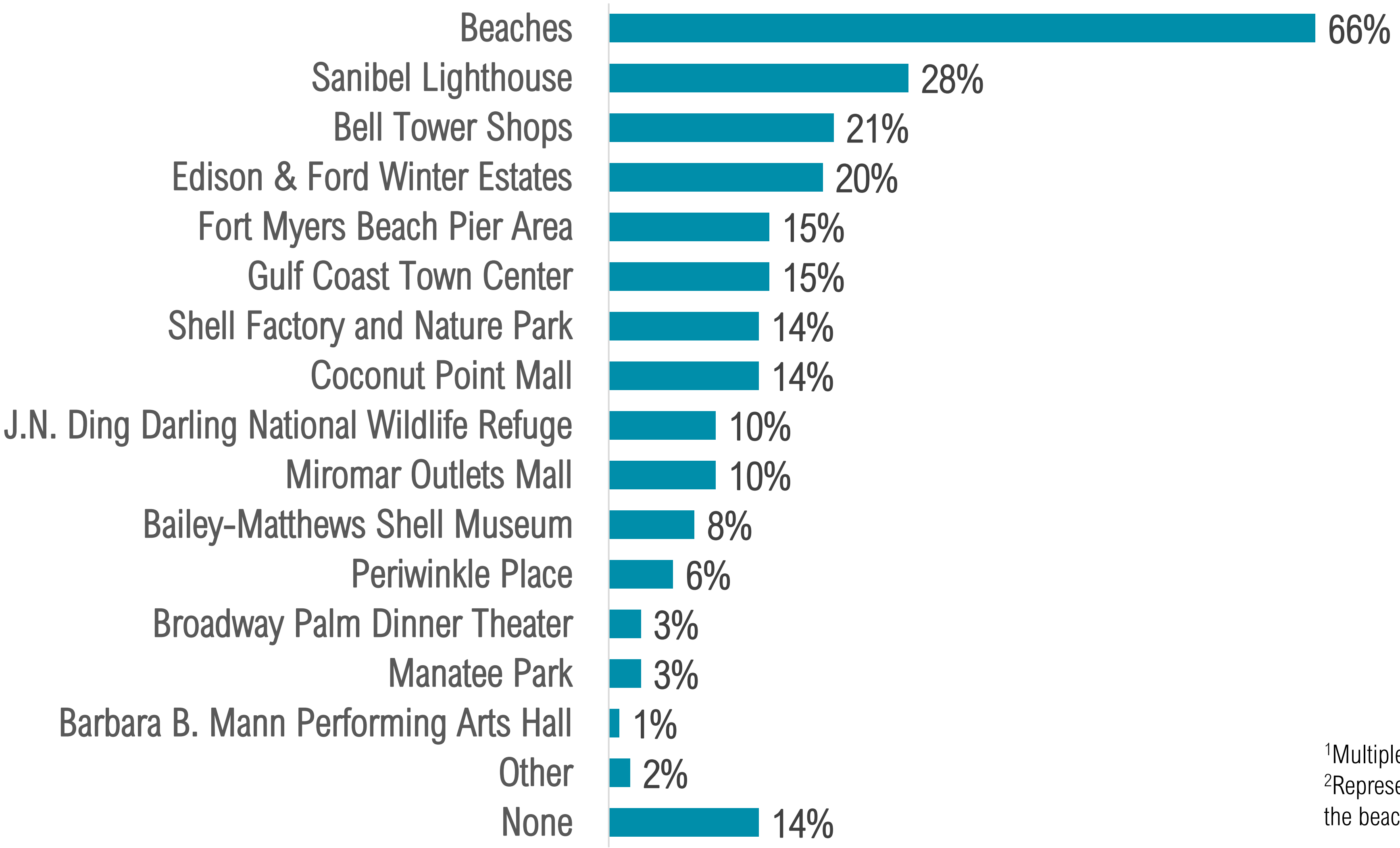
[1]Multiple responses permitted.

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



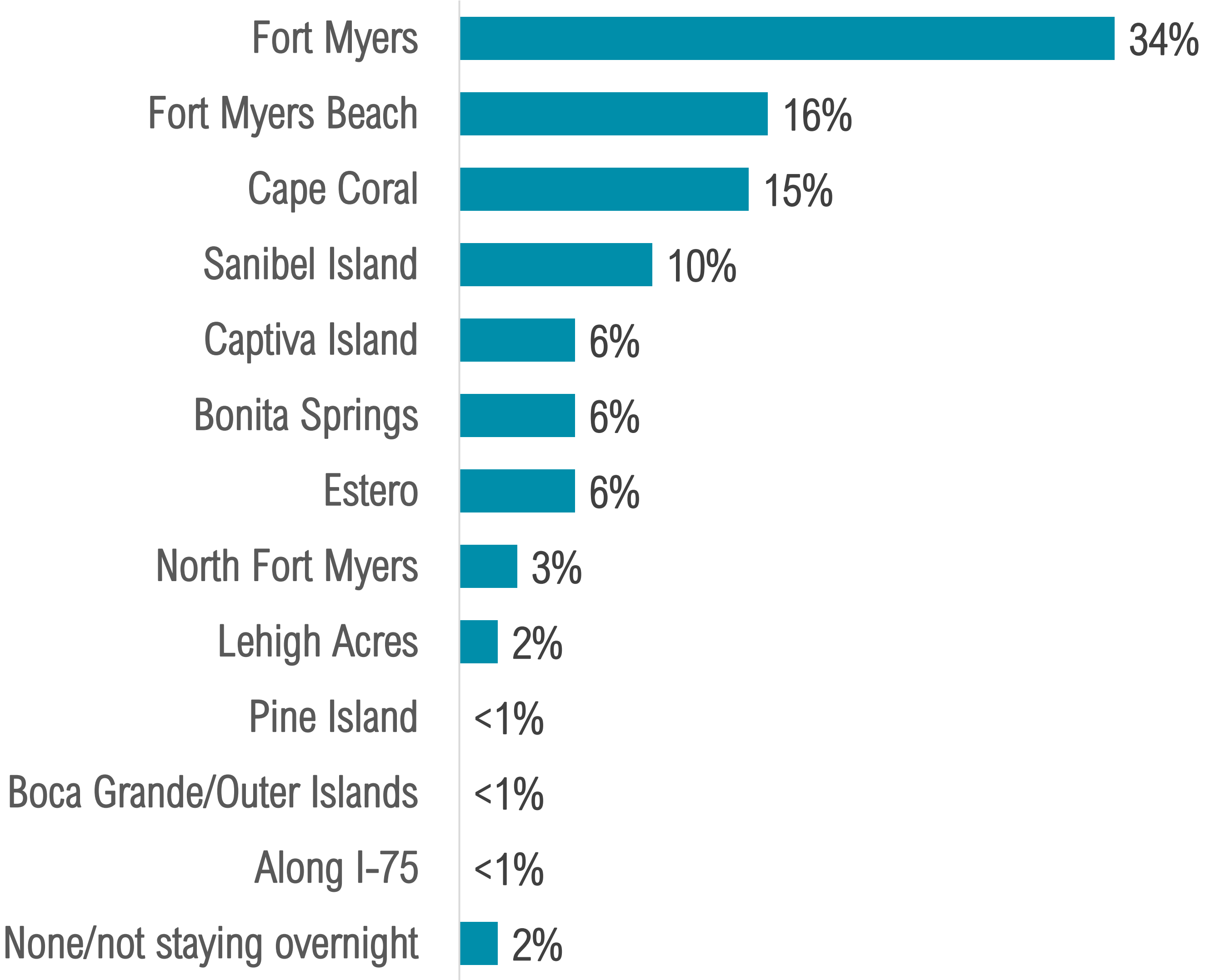
[1]Three responses permitted.
[2]Multiple responses permitted.

ATTRACTIONS VISITED[1]



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

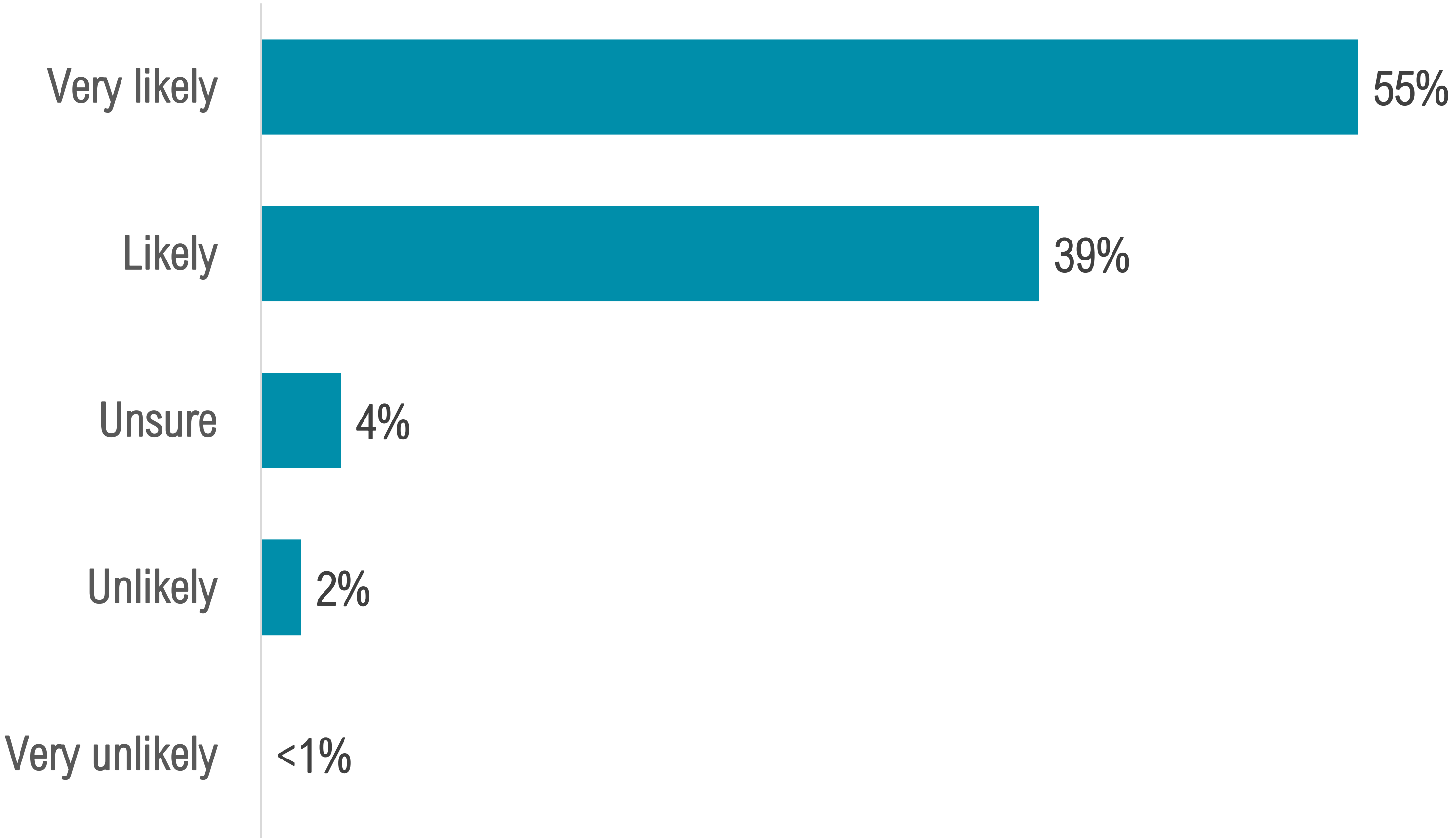
COMMUNITY STAYED



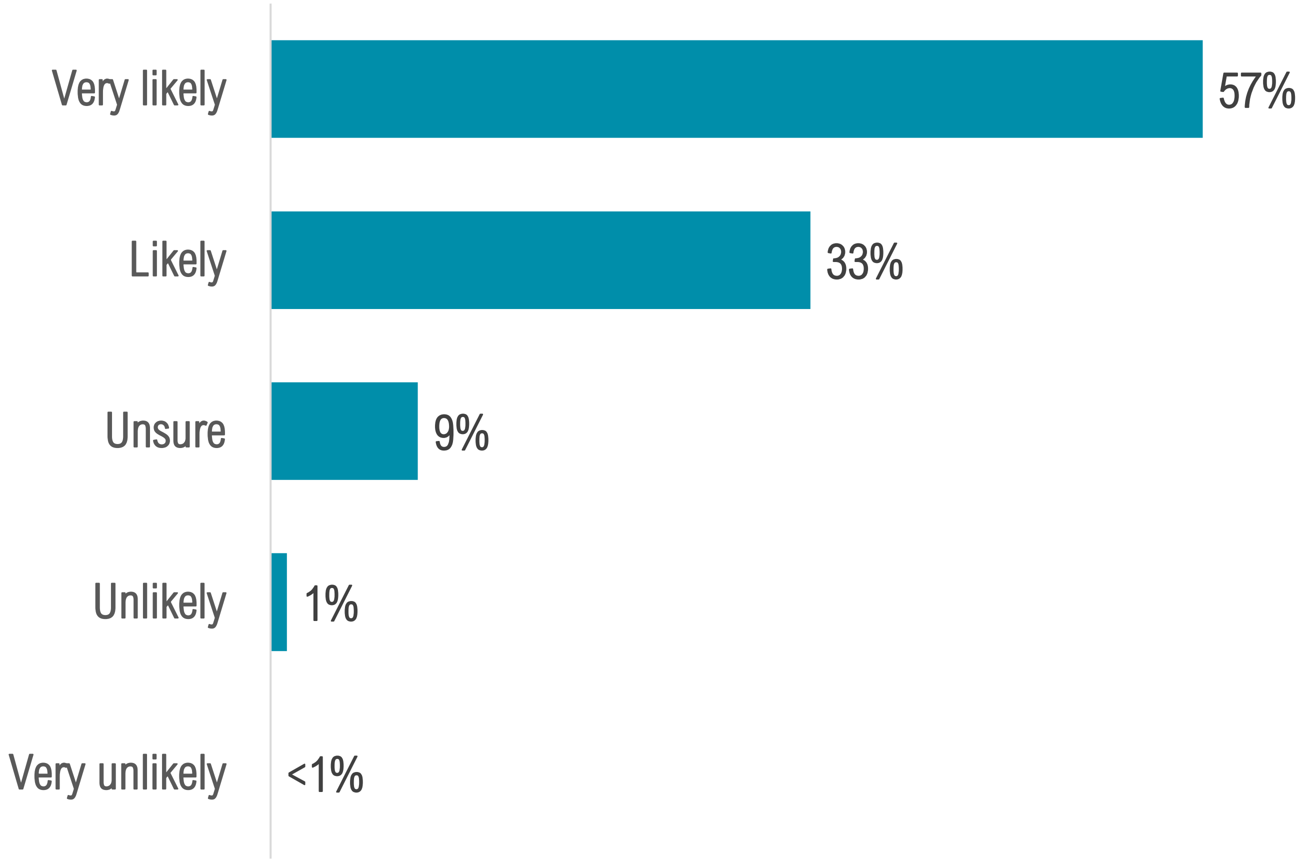
VISITOR JOURNEY: POST-TRIP EVALUATION

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

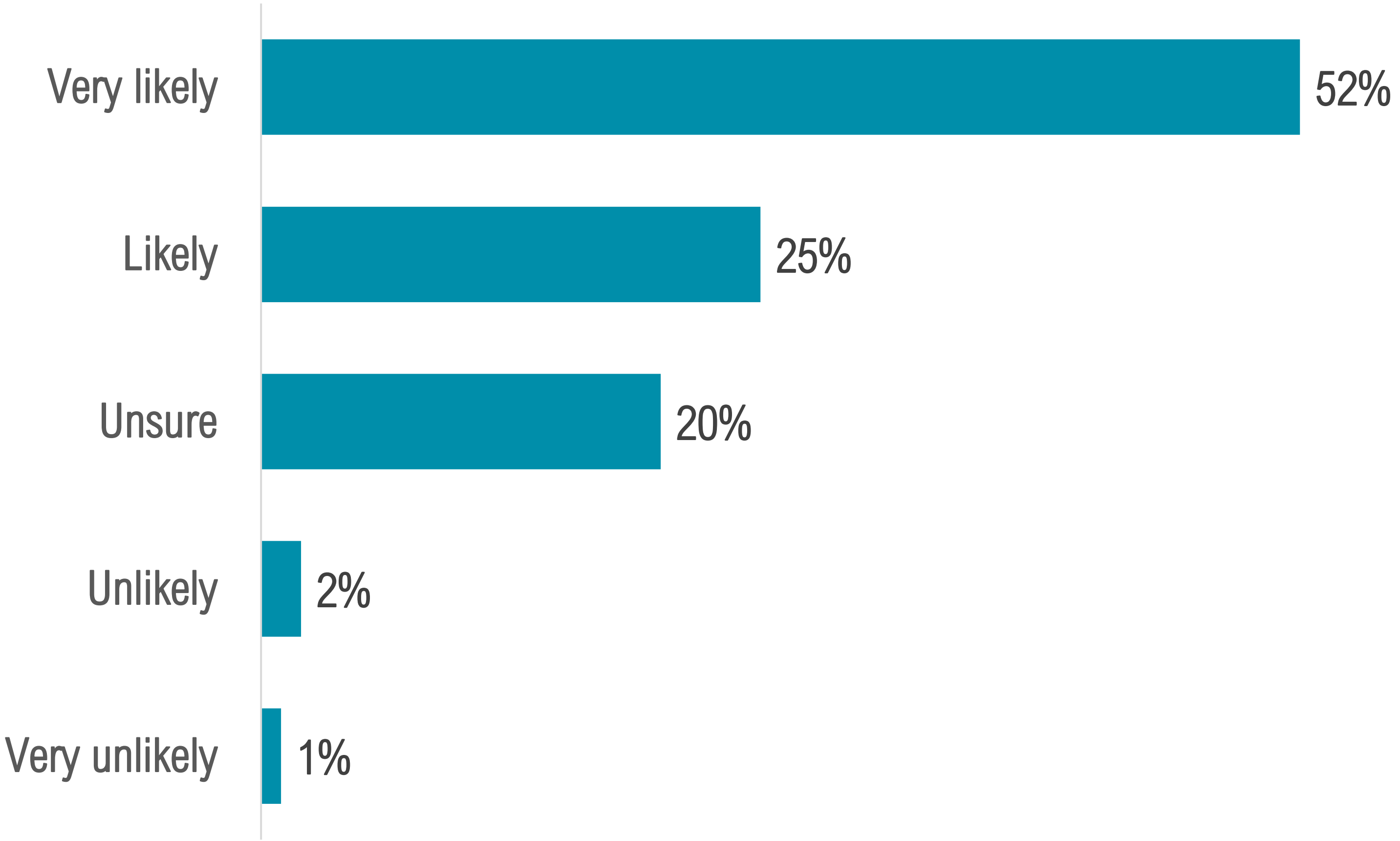
LIKELIHOOD OF RECOMMENDING THE AREA



LIKELIHOOD OF RETURNING TO THE AREA



LIKELIHOOD OF RETURNING NEXT YEAR



CROSSTABULATIONS: LIKELIHOOD OF RECOMMENDING[1]

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2023	2024	2023	2024	2023	2024	2023	2024
Very Likely	45%	52%	53%	56%	51%	53%	52%	69%
Likely	36%	34%	40%	40%	40%	40%	40%	29%
Unsure/don't know	13%	9%	5%	3%	6%	5%	8%	2%
Unlikely	4%	4%	1%	1%	2%	2%	<1%	<1%
Very Unlikely	2%	1%	1%	<1%	1%	<1%	<1%	<1%

CROSSTABULATIONS: LIKELIHOOD OF RETURNING[1]

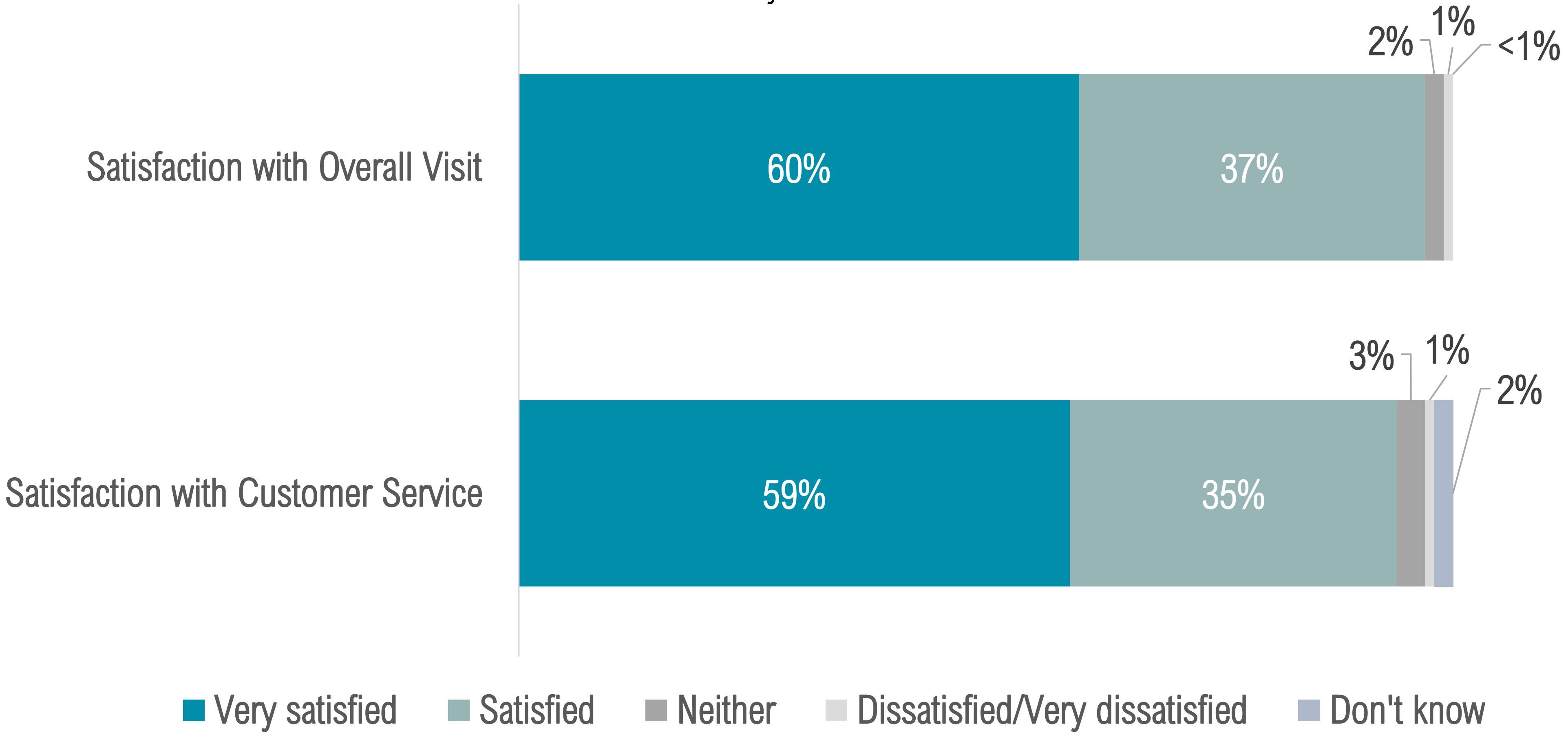
	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2023	2024	2023	2024	2023	2024	2023	2024
Very Likely	44%	50%	57%	61%	53%	56%	59%	72%
Likely	28%	30%	36%	33%	35%	34%	25%	19%
Unsure/don't know	20%	14%	6%	6%	8%	8%	14%	8%
Unlikely	7%	6%	1%	<1%	3%	2%	<1%	<1%
Very Unlikely	1%	<1%	<1%	<1%	1%	<1%	2%	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	42%	41%	48%	56%	45%	51%	50%	63%
Likely	27%	30%	32%	24%	32%	27%	27%	13%
Unsure/don't know	21%	22%	19%	18%	20%	19%	23%	22%
Unlikely	5%	4%	<1%	1%	1%	2%	<1%	<1%
Very Unlikely	5%	3%	1%	1%	2%	1%	<1%	2%

SATISFACTION

- Compared to 2023, visitors were **more** likely to be **satisfied** or **very satisfied** with their overall visit (+3%) and their satisfaction levels with the customer service they received remained the same.



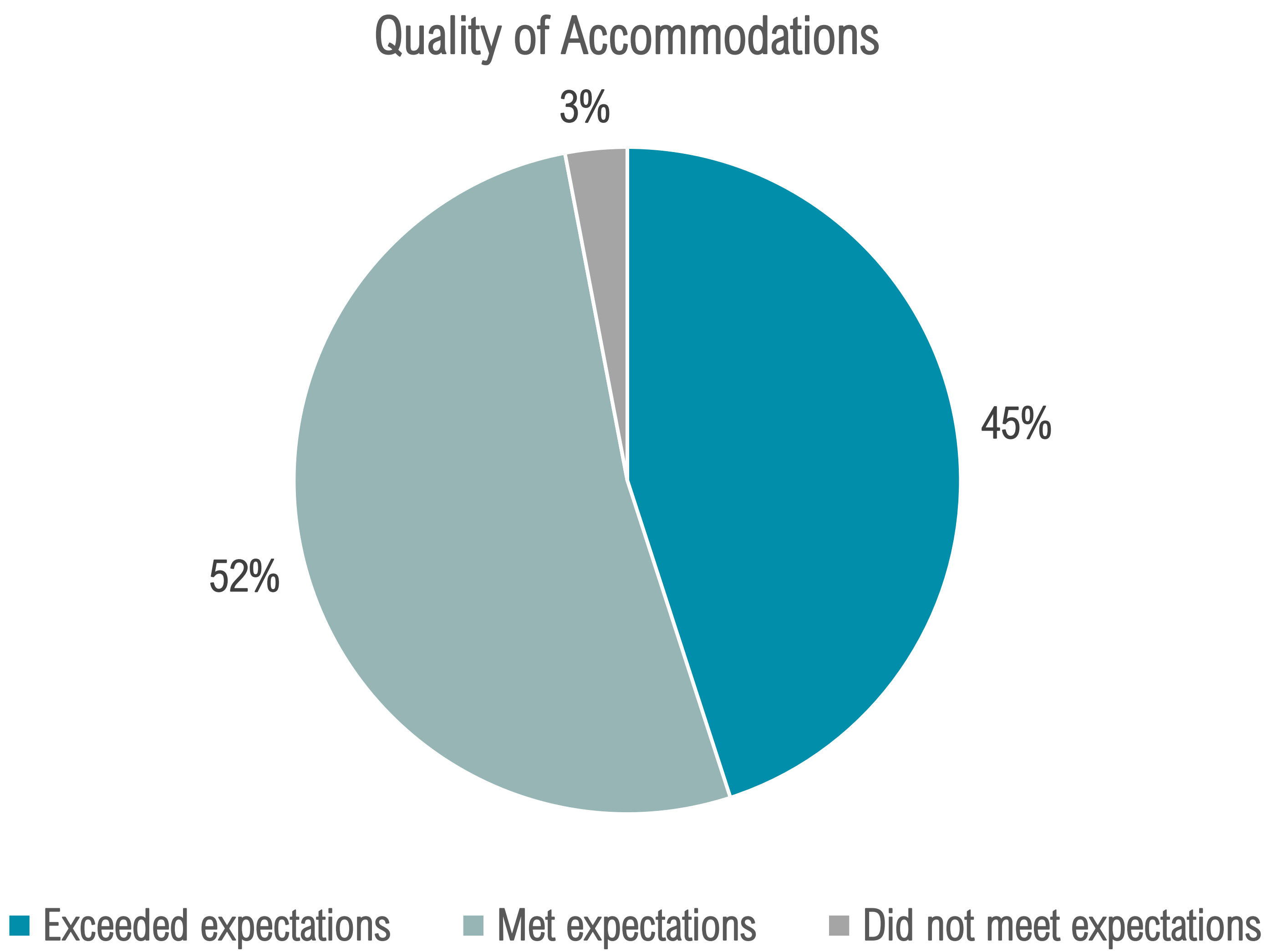
CROSSTABULATIONS: SATISFACTION WITH OVERALL VISIT

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2023	2024	2023	2024	2023	2024	2023	2024
Very Satisfied	49%	59%	60%	61%	55%	59%	63%	73%
Satisfied	39%	34%	37%	36%	39%	37%	33%	25%
Unsure/don't know	6%	4%	3%	2%	4%	3%	4%	2%
Dissatisfied	5%	3%	<1%	1%	2%	1%	<1%	<1%
Very Dissatisfied	1%	<1%	<1%	<1%	<1%	<1%	<1%	<1%

CROSSTABULATIONS: SATISFACTION WITH SERVICE

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2023	2024	2023	2024	2023	2024	2023	2024
Very Satisfied	59%	61%	60%	59%	58%	58%	68%	72%
Satisfied	27%	30%	35%	36%	35%	37%	24%	21%
Unsure/don't know	10%	6%	5%	5%	5%	4%	8%	7%
Dissatisfied	4%	3%	<1%	<1%	2%	1%	<1%	<1%
Very Dissatisfied	<1%	<1%	<1%	<1%	<1%	<1%	<1%	<1%

SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

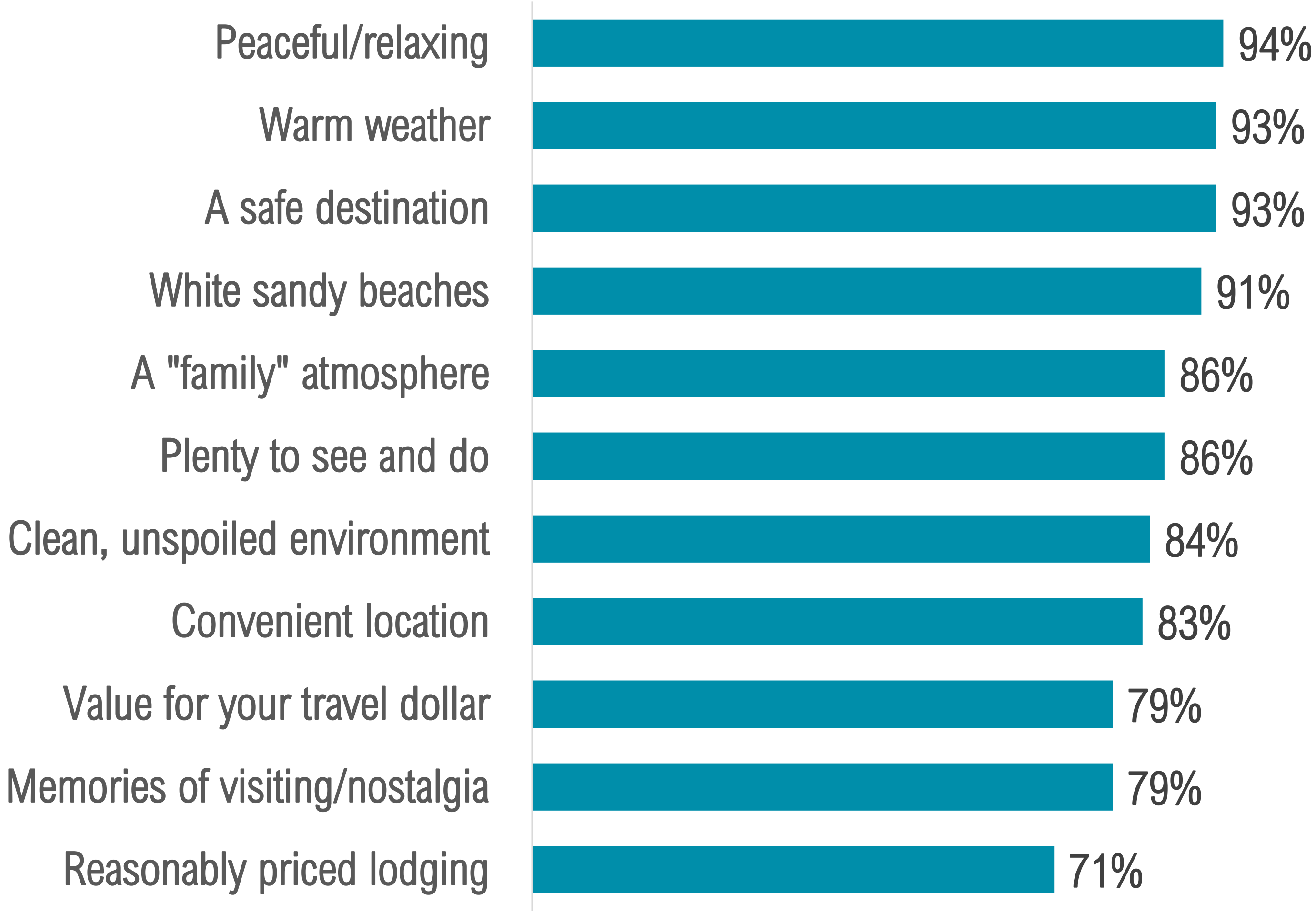


SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

	1st Time Visitors		Repeat Visitors		Domestic Visitors		Int’l Visitors	
	2023	2024	2023	2024	2023	2024	2023	2024
Exceeded Expectations	43%	46%	40%	44%	55%	49%	39%	44%
Met Expectations	45%	48%	55%	53%	39%	48%	53%	51%
Did Not Meet Expectations	12%	6%	5%	3%	6%	3%	8%	5%

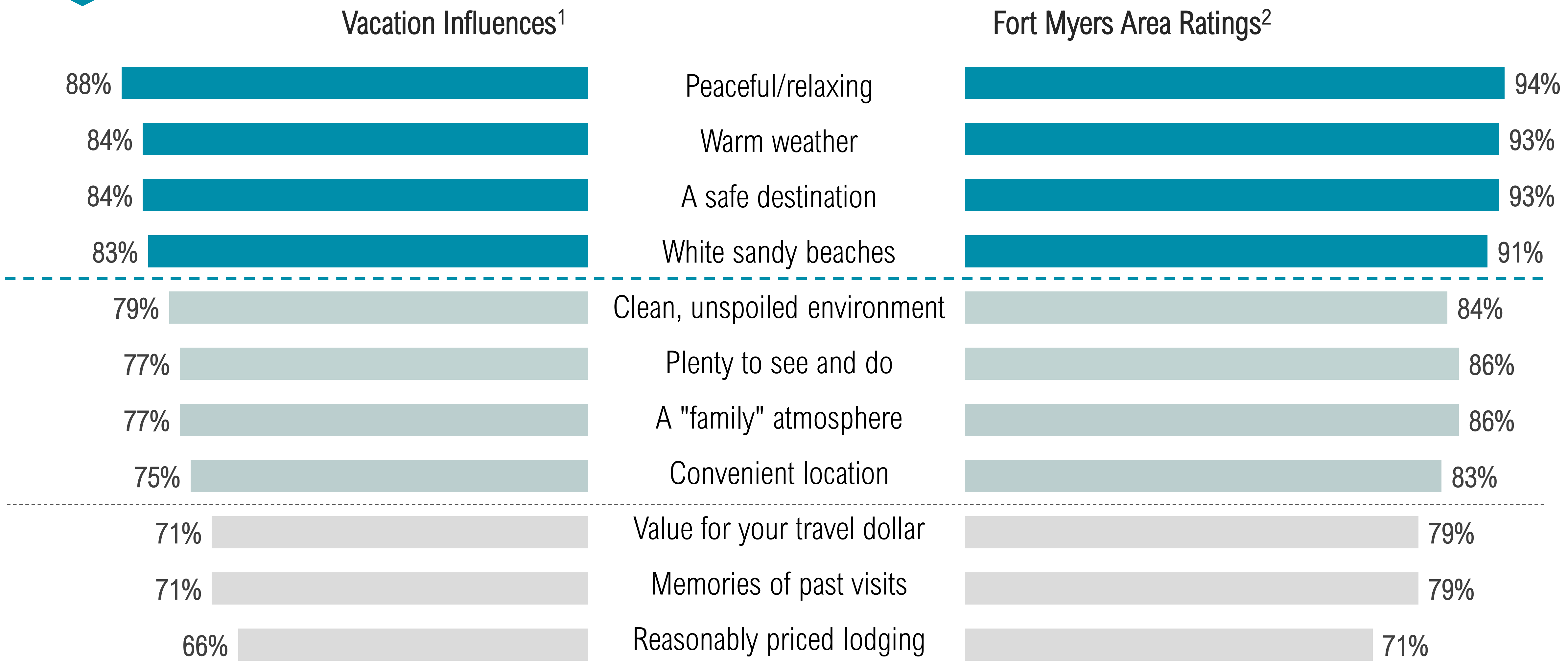
ATTRIBUTE RATINGS[1]

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



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

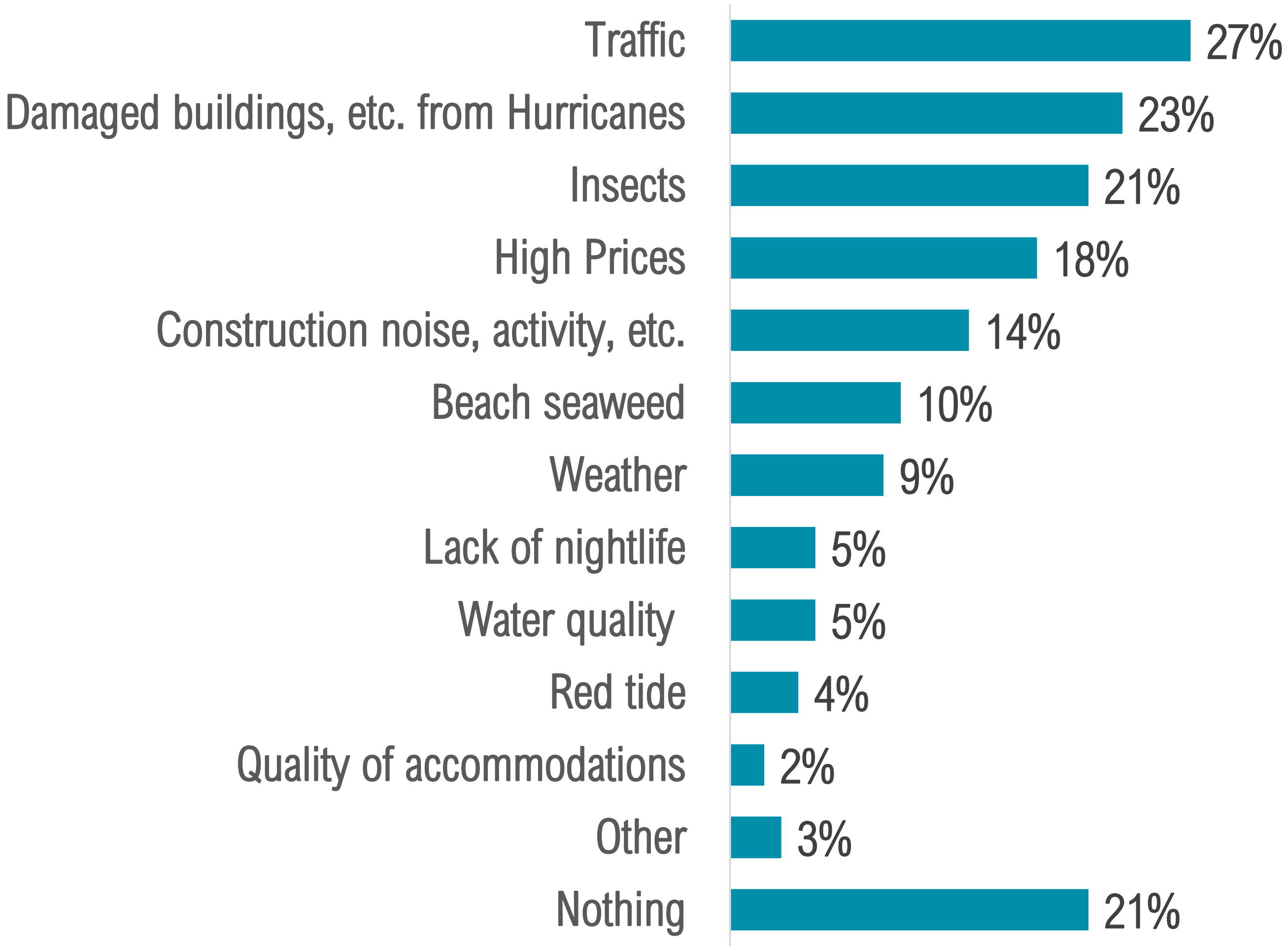
VACATION ATTRIBUTE INFLUENCE VS. RATINGS



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

LEAST LIKED FEATURES[1]

Over 1 in 4 visitors mentioned **traffic,** while **nearly 1 in 4** were concerned with **hurricane damage**, and **21%** had no concerns at all during their visit.



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

AREA DESCRIPTIONS

Peaceful & Relaxing

- “We’ve had a wonderful vacation with our family; visiting the beaches, enjoying the sunshine, great weather, and relaxing environment.”
- “It’s a very enjoyable way to spend vacation: relaxing in a tropical paradise. “
- “The retirement and vacation communities on the islands are very secluded and peaceful. I’d love to retire here.”

Warm Weather

- “Nice family vibe with good restaurants, nice people, warm weather, good shopping, and more.”
- “It has been a great vacation as usual, full of warm sunshine-filled days and cool nights.”
- “Great location for business meetings and conferences with amazing weather and good golf courses in a tropical setting.”

AREA DESCRIPTIONS

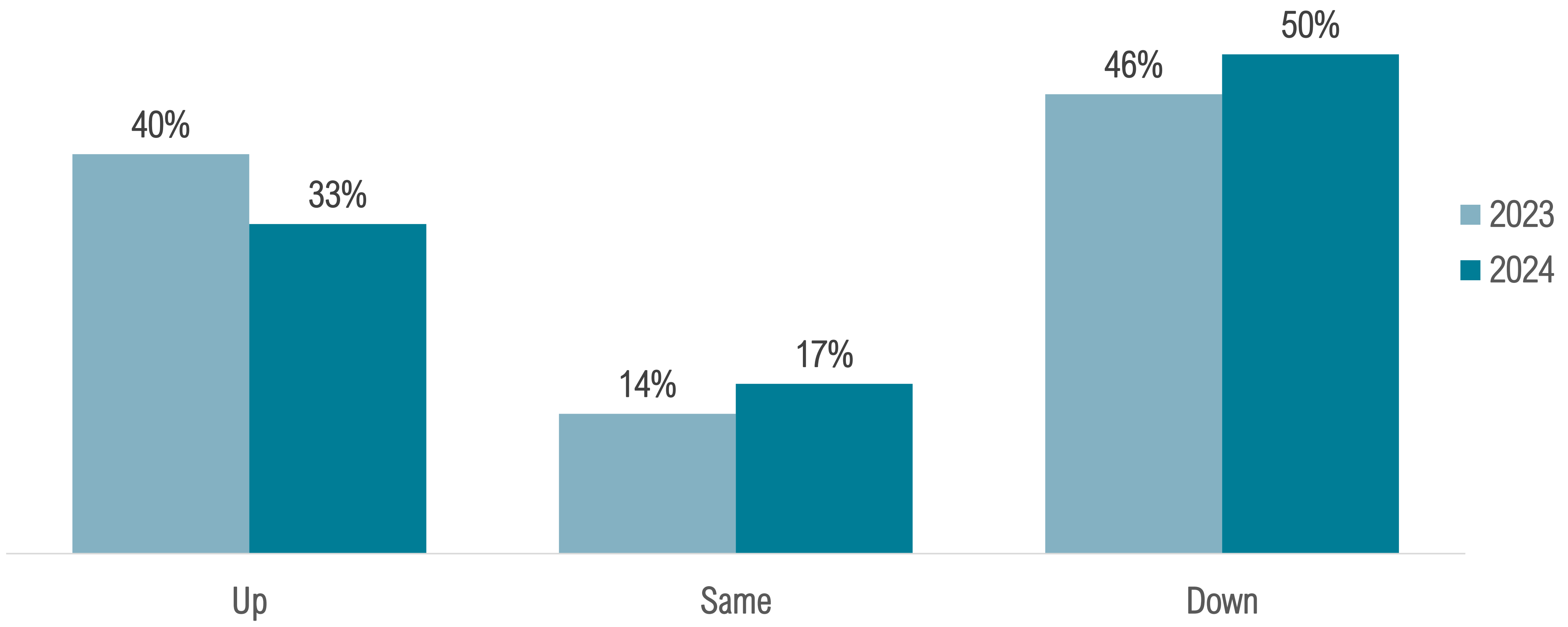
A Safe Destination

- “Safe, family-friendly, clean, but lots of hurricane recovery related construction still going on. Still worth a visit though!”
- “We found the area to be extremely clean, fun, and family-friendly. Definitely a must-try vacation spot for people who like vacationing in Florida!”
- “More family-oriented than I had expected, which has been great. Edison & Ford was outstanding!”

White Sandy Beaches

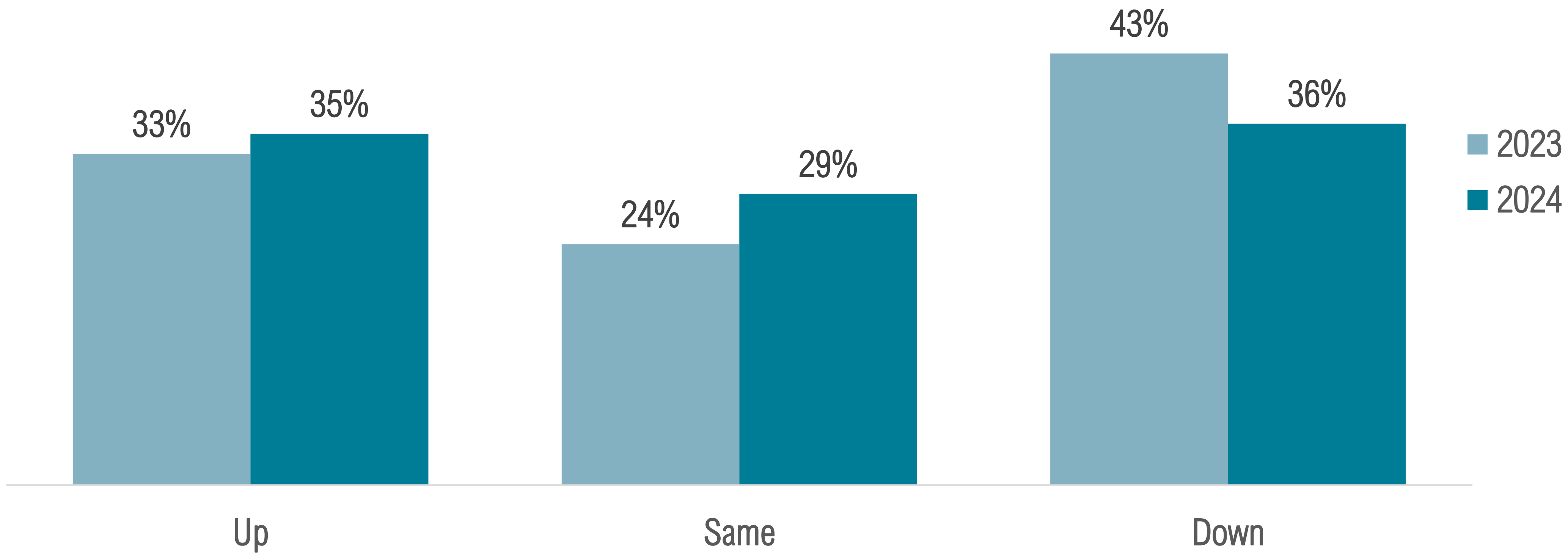
- “Palm trees, white sandy beaches, and beautifully breathtaking sunsets, what more could you need?”
- “We had a great time on vacation in the lush tropical setting, especially visiting the white sandy beaches and soaking up some rays of Florida sunshine.”
- “Although they’re still recovering, I still think that no other place has such great beaches, shopping, and restaurant options, especially for a reasonable price.”

OCCUPANCY BAROMETER[1]: OCT – DEC RESERVATIONS



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

OCCUPANCY BAROMETER[1]: JAN – MAR RESERVATIONS



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

Year-Over-Year Comparisons

ECONOMIC IMPACT

Visitor & Lodging Statistics[1]	Jul - Sep 2023	Jul - Sep 2024	% Change '23 – '24
Visitors	706,700	695,100	- 1.6%
Visitor Days	4,115,200	4,128,900	+ 0.3%
Room Nights	865,200	885,700	+ 2.4%
Direct Expenditures[2]	$584,185,900	$633,798,700	+ 8.5%
Total Economic Impact[3]	$935,281,600	$1,009,641,300	+ 8.0%
Occupancy	50.6%	47.2%	- 6.7%
ADR	$134.26	$146.09	+ 8.8%
RevPAR	$67.94	$68.99	+ 1.6%

[1] Significantly more units were available in Jul-Sep 2024 compared to Jul-Sep 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.

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM[1]

	Jul - Sep 2023[4]	Jul - Sep 2024	% Change '23 – '24
Direct Jobs[2]	5,900	6,310	+ 6.9%
Total Jobs[3]	7,930	8,480	+ 6.9%
Direct Wages[2]	$202,684,500	$218,375,300	+ 7.7%
Total Wages[3]	$287,426,400	$309,675,900	+ 7.7%
Direct Local Taxes[2]	$12,861,300	$13,867,600	+ 7.8%
Total Local Taxes[3]	$16,921,400	$18,255,200	+ 7.9%
Direct State Taxes[2]	$27,848,900	$30,043,600	+ 7.9%
Total State Taxes[3]	$36,846,000	$39,766,100	+ 7.9%

[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.
[4] Revised to reflect updated IMPLAN dataset.

VISITOR TYPE

Visitor Type	Jul - Sep 2023	Jul - Sep 2024
Visitors in Paid Accommodations	67%	67%
Visitors in Non-Paid Accommodations	30%	31%
Day Trippers	3%	2%

PRE-VISIT

Planned trip in advance	Jul - Sep 2023	Jul - Sep 2024
1 week or less	7%	6%
2-4 weeks	9%	14%
1-2 months	38%	40%
3-6 months	33%	29%
6 months or more	13%	11%
Not sure	<1%	<1%

Considered Other Destinations	Jul - Sep 2023	Jul - Sep 2024
Yes	43%	38%
No	57%	62%

PRE-VISIT

Other destinations considered[1]	Jul - Sep 2023[2]	Jul - Sep 2024[2]
Sarasota/Siesta Key	14%	19%
Tampa/Clearwater/St.Pete	21%	19%
Naples/Marco Island	18%	18%
Orlando	17%	17%
Miami/Ft. Lauderdale	11%	13%
Keys/Key West	12%	12%
Daytona Beach	13%	8%
West Palm Beach	10%	7%
Punta Gorda/Englewood	4%	6%
Other destinations in FL	13%	17%
Other destinations outside of FL	26%	26%

[1]Multiple responses permitted.
[2]Base: 38% of visitors who considered other destinations.

PRE-VISIT

Trip Planning Websites/Apps[1]	Jul - Sep 2023	Jul - Sep 2024
Airline websites/apps	30%	35%
Online search engines	31%	28%
Airbnb, Vrbo, etc.	21%	20%
Booking websites	16%	17%
Hotel websites/apps	12%	16%
Vacation rental websites/apps	14%	14%
Trip Advisor	12%	11%
Traveler reviews, blogs, stories	14%	10%
Visit Florida	8%	8%
Facebook	10%	7%
Instagram	6%	6%
www.VisitFortMyers.com	6%	6%
VCB Facebook Page	8%	6%
YouTube, Hulu, Pandora, etc.	4%	3%
None	18%	19%
Other	3%	4%

[1]Multiple responses permitted.

PRE-VISIT

Information Requests[1]	Jul - Sep 2023	Jul - Sep 2024
Calling a hotel, motel, condo	33%	28%
Requesting and receiving a visitor guide	9%	8%
Calling the VCB	5%	3%
Receiving the VCB e-newsletter	2%	2%
Calling a local Chamber of Commerce	2%	2%
Other	2%	1%
None	57%	62%

[1]Multiple responses permitted.

PRE-VISIT

Recall of Lee County Promotions	Jul - Sep 2023	Jul - Sep 2024
Yes	43%	38%
No	38%	43%
Not sure	19%	19%
% of recallers influenced by promotions	47%	48%
% of total visitors influenced by promotions	21%	18%

PRE-VISIT

Type of Promotions Recalled[1]	Jul - Sep 2023[2]	Jul - Sep 2024[3]
Internet	56%	51%
Social media	39%	36%
Traveler reviews, blogs	27%	22%
Television	10%	10%
www.VisitFortMyers.com	7%	9%
Magazine	5%	8%
Travel/visitor guide	7%	8%
Video streaming services	7%	7%
Email/e-newsletter	6%	6%
Billboard	2%	4%
Newspaper	4%	4%
Brochure	2%	3%
AAA	4%	3%
Radio	1%	2%
Deal-based promotion	2%	2%
Music streaming services	1%	2%
Podcasts	1%	2%
Other	4%	3%

[1]Multiple responses permitted.
[2]Base: 43% of visitors who recalled seeing a promotion.
[3]Base: 38% of visitors who recalled seeing a promotion.

PRE-VISIT

Characteristics influencing decision to visit Lee County (top 2 boxes)[1]	Jul - Sep 2023	Jul - Sep 2024
Peaceful/relaxing	91%	88%
Warm weather	86%	84%
A safe destination	87%	84%
White sandy beaches	86%	83%
Clean, unspoiled environment	81%	79%
Plenty to see and do	82%	77%
A "family" atmosphere	80%	77%
Convenient location	79%	75%
Value for your travel dollar	76%	71%
Memories of past visits/nostalgia	76%	71%
Reasonably priced lodging	71%	66%

[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]	Jul - Sep 2023	Jul - Sep 2024
Beach	40%	45%
Relax & unwind	38%	43%
Visiting friends & relatives	23%	28%
Checking on my property	11%	12%
Part-time resident ("Snowbird")	14%	11%
Shopping	7%	8%
Special occasion	3%	8%
Fishing	3%	8%
Attractions	3%	7%
Golf or tennis	6%	6%
Nature, environment, bird watching	5%	6%
Special event	6%	5%
Water sports	5%	4%
Business meetings/conferences	2%	3%
Biking, hiking	4%	3%
Photography	3%	2%
Sporting event	2%	2%
Culture	1%	2%
Diving, snorkeling	2%	1%
Work-related Hurricane Recovery	2%	1%
Museums, history	1%	1%
Guided tours	1%	1%
Volunteering	1%	1%
Other	4%	5%

[1]Multiple responses permitted.

PRE-VISIT

Transportation	Jul - Sep 2023	Jul - Sep 2024
Fly	78%	73%
Drive a personal vehicle	16%	24%
Drive a rental vehicle	5%	3%
Drive a RV	1%	<1%
Travel by bus	<1%	<1%
Other	<1%	<1%

Airport Used	Jul - Sep 2023	Jul - Sep 2024
Southwest Florida International	86%	85%
Punta Gorda	6%	10%
Ft. Lauderdale International	3%	2%
Miami International	2%	1%
Tampa International	2%	1%
Orlando International	1%	<1%
Other	<1%	1%

TRAVEL PARTY PROFILE

Visitor Origin[1]	Jul - Sep 2023	Jul - Sep 2024
Florida	5.2%	5.6%
Southeast	20.7%	19.8%
Northeast	19.8%	18.4%
Midwest	32.0%	31.5%
West	9.0%	9.2%
Canada	6.8%	7.5%
United Kingdom	1.0%	1.3%
Germany	3.0%	3.4%
Other Europe	1.2%	1.7%
Other International	1.3%	1.6%

Visitor Origin[1]	Jul - Sep 2023	Jul - Sep 2024
New York	9%	6%
Chicago	5%	5%
Atlanta	4%	4%
Cleveland - Akron	5%	3%
Minneapolis - Saint Paul	1%	3%
Detroit	2%	3%

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

TRAVEL PARTY PROFILE

Travel Parties	Jul - Sep 2023	Jul - Sep 2024
Mean travel party size[1]	3.0	3.0
Travel with children under age 18	44%	37%

Travel Party Composition	Jul - Sep 2023	Jul - Sep 2024
As a family	54%	47%
As a couple	28%	33%
By yourself	8%	11%
With other couples/friends	7%	8%
With business associates	2%	1%
In a tour group	<1%	<1%
Other	1%	<1%

[1]Sources: Occupancy Study and Visitor Tracking Study

TRAVEL PARTY PROFILE

Marital Status	Jul - Sep 2023	Jul - Sep 2024
Married/Domestic Partnership	73%	75%
Single	27%	25%

Age	Jul - Sep 2023	Jul - Sep 2024
Average age	50	50
Median age	47	48

Household Income	Jul - Sep 2023	Jul - Sep 2024
Median Income	$105,600	$108,700

TRAVEL PARTY PROFILE

Race/Ethnicity	Jul - Sep 2023	Jul - Sep 2024
Caucasian/White	76%	79%
Hispanic/Latino/Latina/Latinx	13%	11%
African American/Black	3%	3%
Asian/Asian American/Pacific Islander	3%	3%
Middle Eastern/Northern African	1%	1%
Another race/ethnicity	4%	3%

Gender[1]	Jul - Sep 2023	Jul - Sep 2024
Female	50%	54%
Male	50%	46%
Non-binary	<1%	<1%

[1]Of person interviewed.

TRIP EXPERIENCE

Length of Stay[1]	Jul - Sep 2023	Jul - Sep 2024
Average nights in the Fort Myers area	5.8	5.9

First Time/Repeat Visitors	Jul - Sep 2023	Jul - Sep 2024
First-time	33%	30%
Repeat	67%	70%

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

TRIP EXPERIENCE

Type of Accommodations	Jul - Sep 2023	Jul - Sep 2024
Hotel/motel/resort	47%	42%
Personal condo, house, timeshare, etc.	17%	18%
Vacation rental home	10%	15%
Friends/family home	13%	12%
Campground/RV Park	7%	8%
Bed & Breakfast/Inn	3%	2%
Not spending the night	3%	2%
Other	<1%	1%

TRIP EXPERIENCE

Activities[1]	Jul - Sep 2023	Jul - Sep 2024
Relax and unwind	65%	69%
Beach	58%	64%
Restaurants	57%	63%
Visit friends/relatives	35%	42%
Shopping	41%	42%
Fishing	27%	26%
Nature, environment, bird watching	24%	25%
Water sports	27%	23%
Golf or tennis	11%	16%
Attractions	10%	16%
Bars, nightclubs	14%	11%
Biking, hiking	13%	11%
Photography	11%	8%
Special occasion	4%	8%
Spas	6%	7%
Diving, snorkeling	8%	7%
Guided tours	5%	6%
Culture	4%	5%
Special events	6%	5%
Museums, history	5%	5%
Attend or participate in a sporting event	3%	3%
Business meetings/conferences	2%	3%
Volunteering	1%	1%
Other	3%	3%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Attractions[1]	Jul - Sep 2023	Jul - Sep 2024
Beaches	59%	66%
Sanibel Lighthouse	23%	28%
Bell Tower Shops	20%	21%
Edison & Ford Winter Estates	16%	20%
Fort Myers Beach Pier Area[2]	25%	15%
Gulf Coast Town Center	17%	15%
Shell Factory and Nature Park	13%	14%
Coconut Point Mall	15%	14%
J.N. Ding Darling National Wildlife Refuge	10%	12%
Miromar Outlets Mall	12%	10%
Bailey-Matthews Shell Museum	9%	8%
Periwinkle Place	6%	6%
Broadway Palm Dinner Theater	2%	3%
Manatee Park	2%	3%
Barbara B. Mann Performing Arts Hall	1%	1%
Other	2%	2%
None	10%	14%

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

TRIP EXPERIENCE

Area stayed	Jul - Sep 2023	Jul - Sep 2024
Fort Myers	24%	34%
Fort Myers Beach	20%	16%
Cape Coral	17%	15%
Sanibel Island	13%	10%
Captiva Island	5%	6%
Bonita Springs	7%	6%
Estero	5%	6%
North Fort Myers	2%	3%
Lehigh Acres	2%	2%
Pine Island	<1%	<1%
Boca Grande/Outer Islands	1%	<1%
Along I-75	1%	<1%
None/not staying overnight	3%	2%

POST-TRIP EVALUATION

Likelihood of Recommending the Area	Jul - Sep 2023	Jul - Sep 2024
Very Likely	51%	55%
Likely	40%	39%
Unsure/don't know	6%	4%
Unlikely	2%	2%
Very Unlikely	1%	<1%

Likelihood of Returning to the Area	Jul - Sep 2023	Jul - Sep 2024
Very Likely	53%	57%
Likely	34%	33%
Unsure/don't know	11%	9%
Unlikely	2%	1%
Very Unlikely	<1%	<1%

Likelihood of Returning Next Year	Jul - Sep 2023	Jul - Sep 2024
Very Likely	45%	52%
Likely	32%	25%
Unsure/don't know	20%	20%
Unlikely	1%	2%
Very Unlikely	2%	1%

POST-TRIP EVALUATION

Satisfaction with Accommodations	Jul - Sep 2023	Jul - Sep 2024
Exceeded expectations	41%	45%
Met expectations	51%	52%
Did not meet expectations	8%	3%

POST-TRIP EVALUATION

Satisfaction with Visit	Jul - Sep 2023	Jul - Sep 2024
Very satisfied	56%	60%
Satisfied	38%	37%
Neither	3%	2%
Dissatisfied	2%	1%
Very dissatisfied	<1%	<1%
Don't know/no opinion	1%	<1%

Satisfaction with Customer Service	Jul - Sep 2023	Jul - Sep 2024
Very satisfied	59%	59%
Satisfied	34%	35%
Somewhat satisfied	5%	3%
Dissatisfied	1%	1%
Very dissatisfied	<1%	<1%
Don't know/no opinion	1%	2%

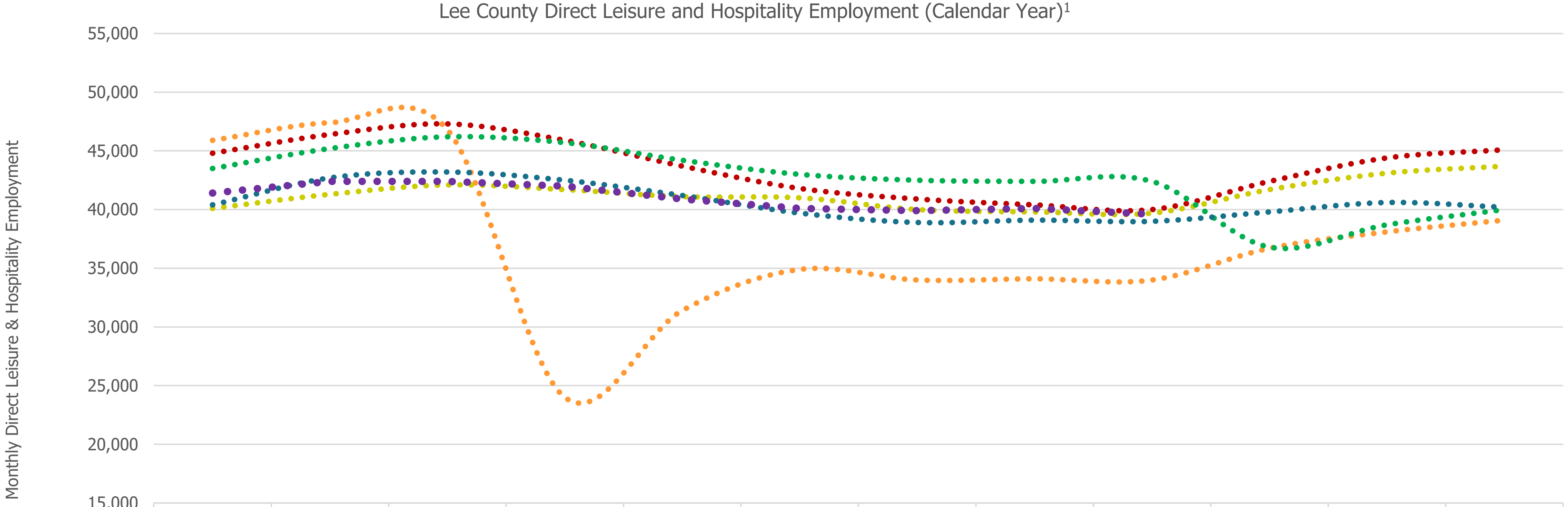
POST-TRIP EVALUATION

Visitor Concerns[1]	Jul - Sep 2023	Jul - Sep 2024
Traffic	23%	27%
Damaged buildings, etc.	26%	23%
Insects	18%	21%
High prices	16%	18%
Construction noise, activity, etc.	10%	14%
Beach seaweed	8%	10%
Weather	8%	9%
Lack of nightlife	8%	5%
Water quality	5%	5%
Red tide	5%	4%
Quality of accommodations	3%	2%
Other	4%	3%
Nothing	26%	21%

[1]Multiple responses permitted.

Industry Data

LEISURE & HOSPITALTY EMPLOYMENT

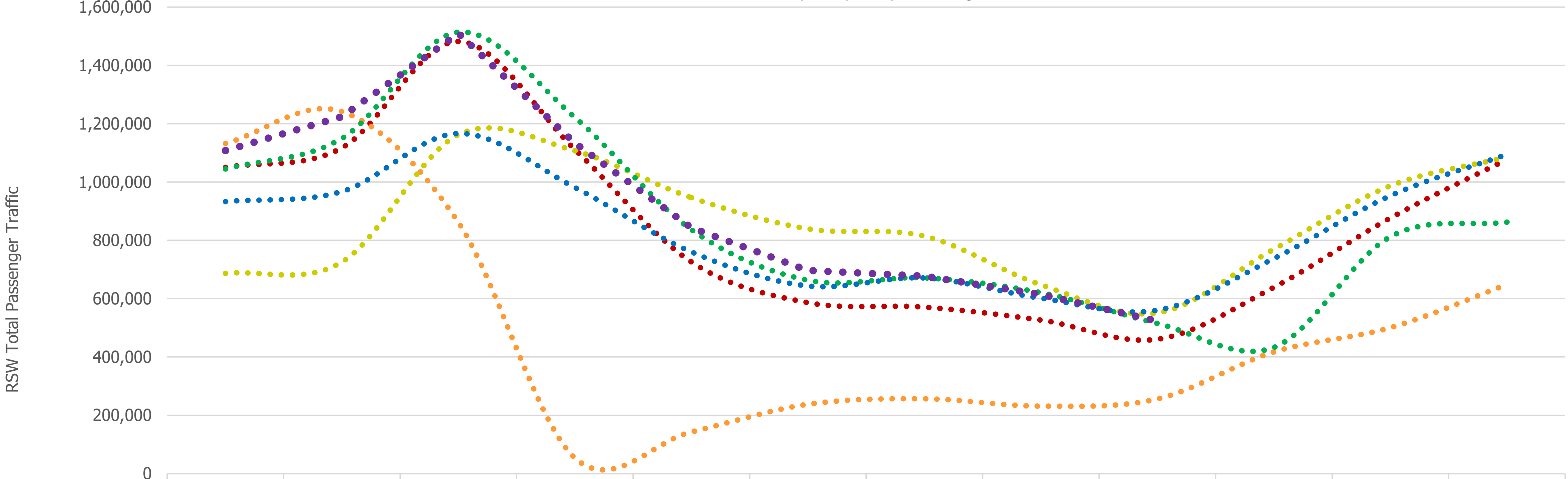


	January	February	March	April	May	June	July	August	September	October	November	December
2019	44,800	46,400	47,300	45,900	43,700	41,800	40,900	40,400	40,000	42,400	44,400	45,100
2020	45,900	47,400	46,800	24,000	31,400	34,900	34,000	34,100	34,000	36,700	38,100	39,100
2021	40,100	41,300	42,100	41,700	41,100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

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

RSW PASSENGER TRAFFIC

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



	January	February	March	April	May	June	July	August	September	October	November	December
2019	1,050,093	1,117,409	1,482,239	1,111,558	725,754	586,319	570,977	526,519	460,869	638,922	876,703	1,077,818
2020	1,132,103	1,241,590	861,221	53,379	143,004	237,706	256,418	231,283	255,926	417,305	500,468	648,011
2021	686,563	725,735	1,162,342	1,107,004	946,366	839,377	814,471	647,534	551,041	769,524	986,908	1,085,569
2022	1,044,816	1,149,618	1,514,046	1,221,628	836,379	663,141	671,225	620,532	515,007	432,667	812,305	862,368
2023	932,896	967,416	1,166,442	981,216	760,330	643,486	670,818	601,542	560,358	737,527	953,025	1,094,783
2024	1,108,190	1,223,761	1,509,777	1,133,256	843,270	696,867	677,137	614,531	523,004			

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

LICENSED TRANSIENT RENTAL UNITS

Licensed Transient Rental Units in Lee County, as of October 2024[1]					
	Hotel	Motel	Bed & Breakfast	Vacation Rental	Total
Fort Myers	5,526	1,152	9	554	7,366
Cape Coral	573	204	0	2495	3,381
Fort Myers Beach	845	392	6	1801	3,130
Sanibel	67	685	0	1632	2,449
Bonita Springs	1,221	38	0	525	1,828
North Fort Myers	0	578	0	55	635
Estero	556	0	0	25	592
Captiva	105	156	0	310	585
Boca Grande	76	107	0	250	444
Lehigh Acres	74	0	0	185	267
Saint James City	0	20	0	52	74
Bokeelia	0	31	0	38	70
Matlacha	0	0	2	26	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	**9,043**	**3,372**	**17**	**7,952**	**20,384[2]**

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

Methodology

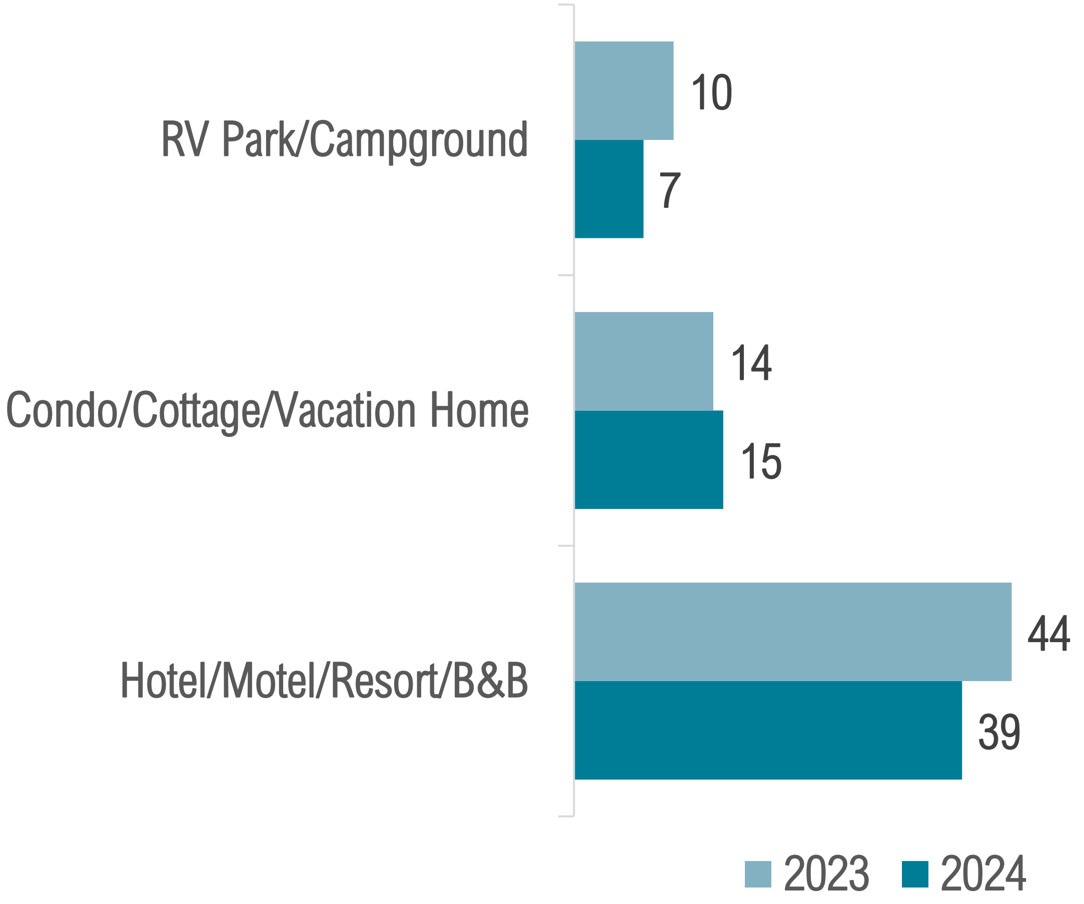
METHODOLOGY

- Economic Impact of tourism in Lee County is derived from:
  - Visitor Tracking Study
    - 903 surveys in public areas, hotels, at events around Lee County, and online
    - Target individuals: July - September visitors to Lee County
    - Data Collection: July - September 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 5,817 hotel/rental/campground units (61 properties) reporting to DSG, 9,962 hotel units reporting to STR (80 properties), and 2,930 rental units (95 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: 61 completed surveys
    - Data Collection: Completed in October (for Jul - Sep 2024)
  - Total Sample Size:
    - Data from 5,817 hotel/rental/campground units reporting to DSG (representing 61 properties)
    - Data from 9,962 hotel units reporting to STR (representing 80 properties)
    - Data from 2,930 rental units reporting to KeyData (representing 95 property managers)

Number of Complete Responses



Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

Jul - Sep 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