Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

Apr - Jun 2025

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

KEY PERFORMANCE INDICATORS*

862,700	1,097,600	$770,867,500
Total Visitors	**Room Nights**	**Direct Spending****
+ 6.7%	+ 6.6%	+ 3.2%

*Sources: Smith Travel Research, Key Data, DSG Occupancy Study, and DSG Visitor Tracking Study

Apr - Jun 2025

LODGING METRICS

HOTEL + VACATION RENTAL + CAMPGROUNDS

52.4%	$187.45	$98.28
Occupancy	Average Daily Rate	Revenue Per Available Room
-6.0%	+10.2%	3.6%

HOTELS

59.4%	$167.78	$99.66
Occupancy	Average Daily Rate	Revenue Per Available Room
-5.1%	+8.6%	+3.1%

VACATION RENTALS

33.0%	$275.04	$90.76
Occupancy	Average Daily Rate	Revenue Per Available Room
-1.5%	+13.9%	+12.2%

*Hotel source: Smith Travel Research & DSG Occupancy Study
**Vacation rental source: Key Data & DSG Occupancy Study

Apr - Jun 2025

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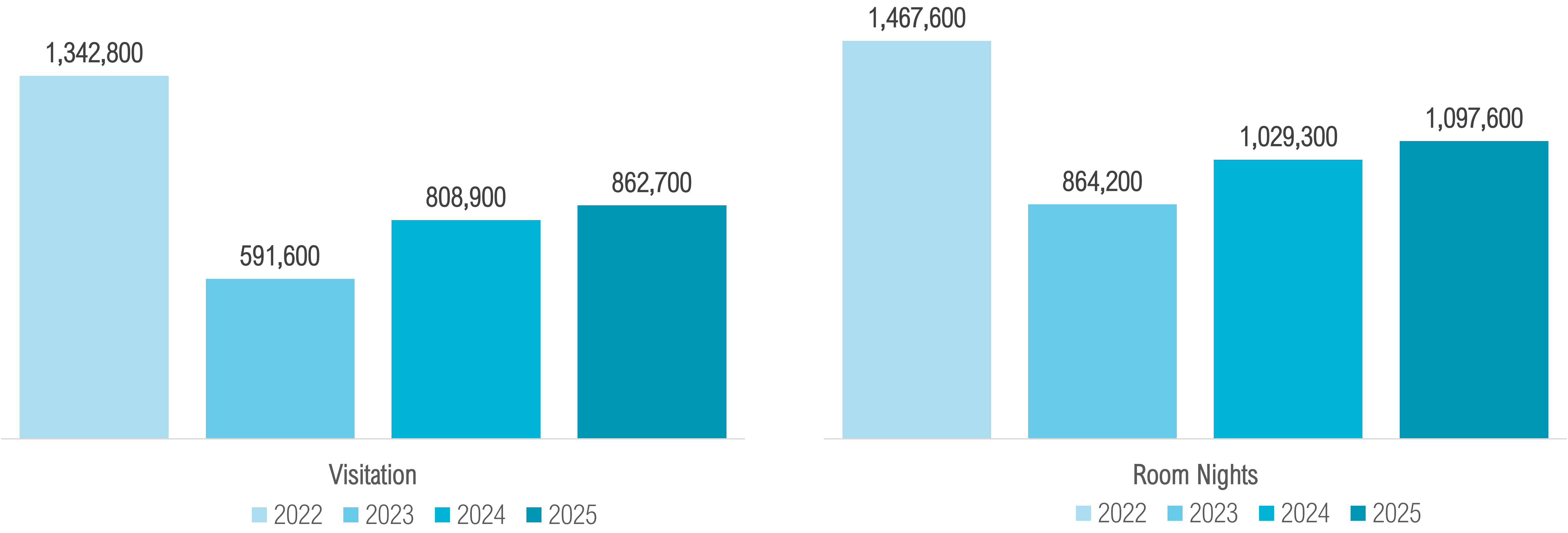
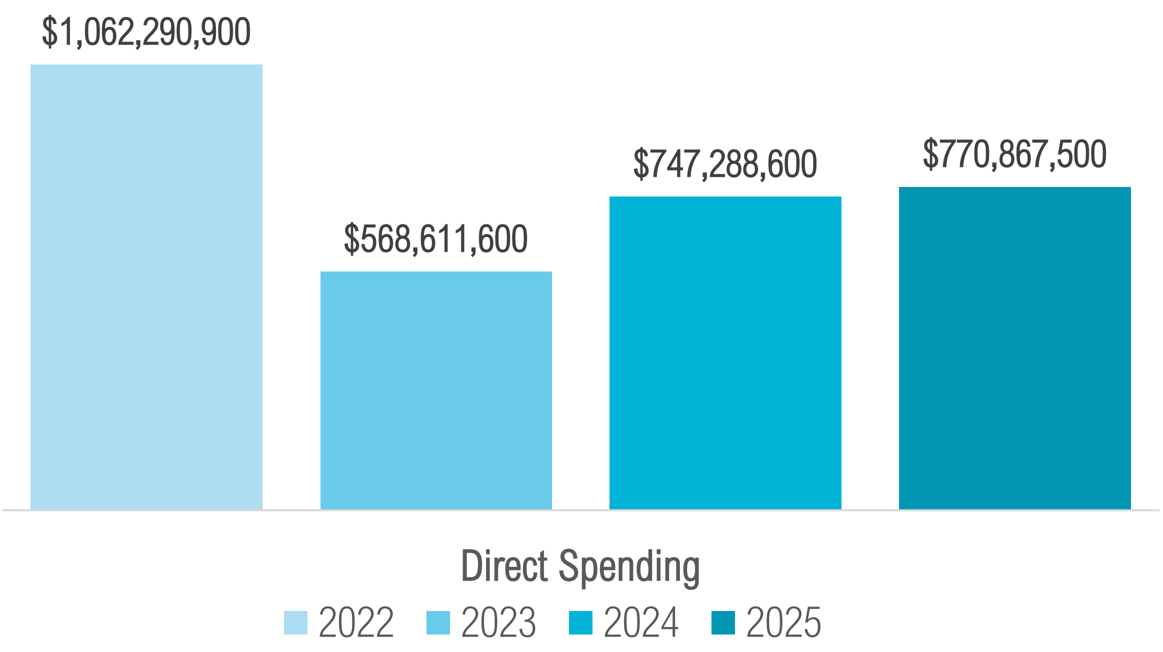
RESEARCH

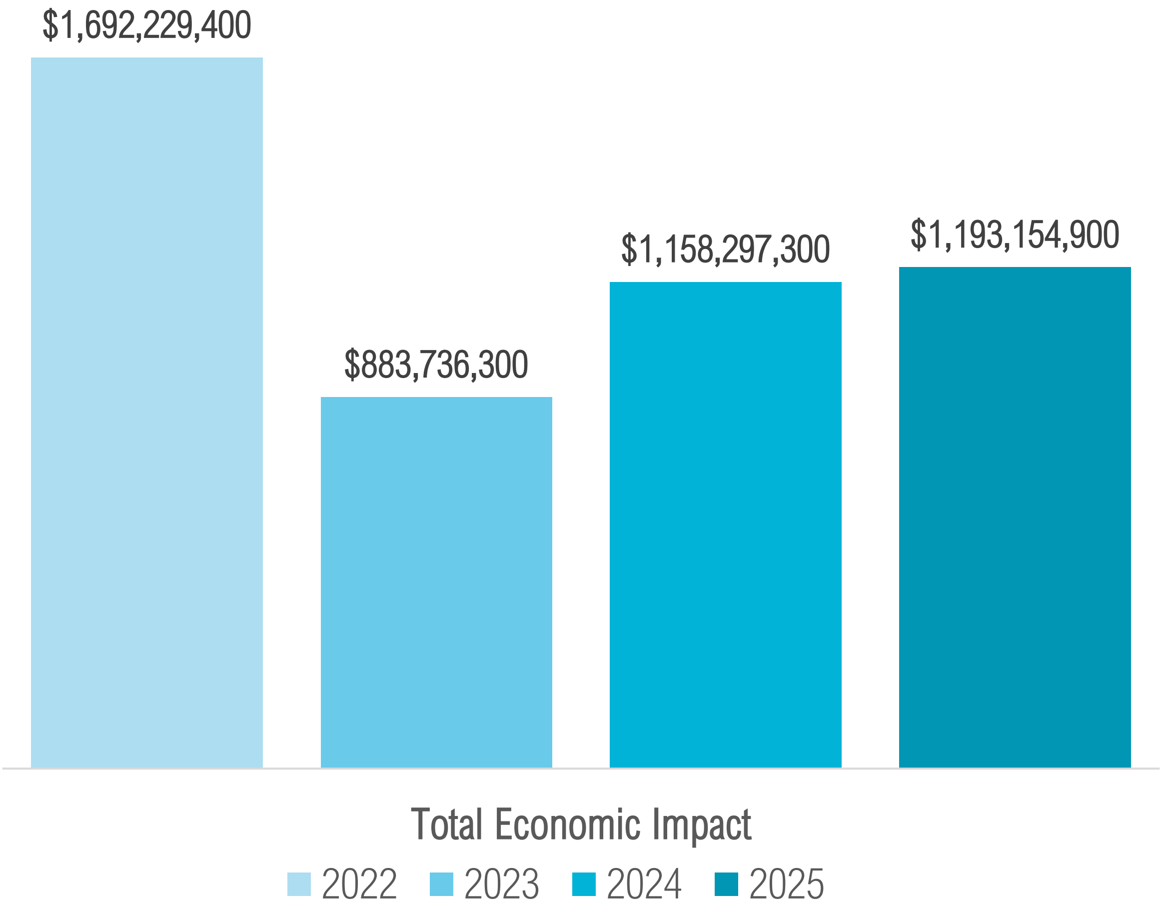
APR-JUN 2022-2025 VISITATION & ROOM NIGHTS[1,2]



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

APR-JUN 2022-2025 SPENDING & ECONOMIC IMPACT[1,2]





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

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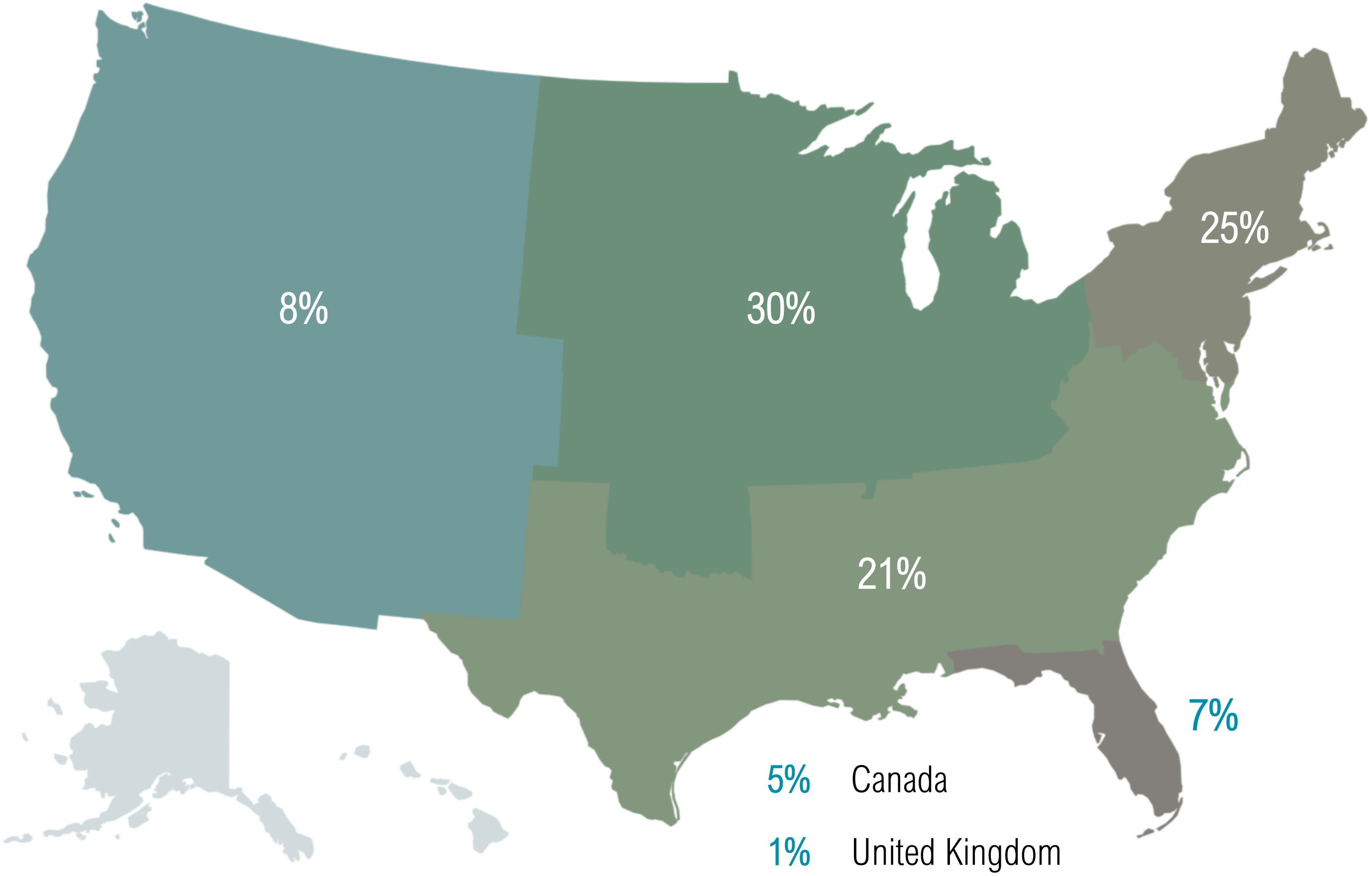
VISITOR ORIGINS & TRANSPORTATION

Top Origin Regions & Countries[1]



5%	Canada
1%	United Kingdom
1%	Germany
2%	Other International

Top Origin Markets[1]	Percent
New York	7%
Chicago	5%
Philadelphia	4%
Atlanta	4%
Minneapolis-Saint Paul	4%
Boston	3%
Detroit	3%
Washington, DC-Hagerstown	3%

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Apr - Jun 2025

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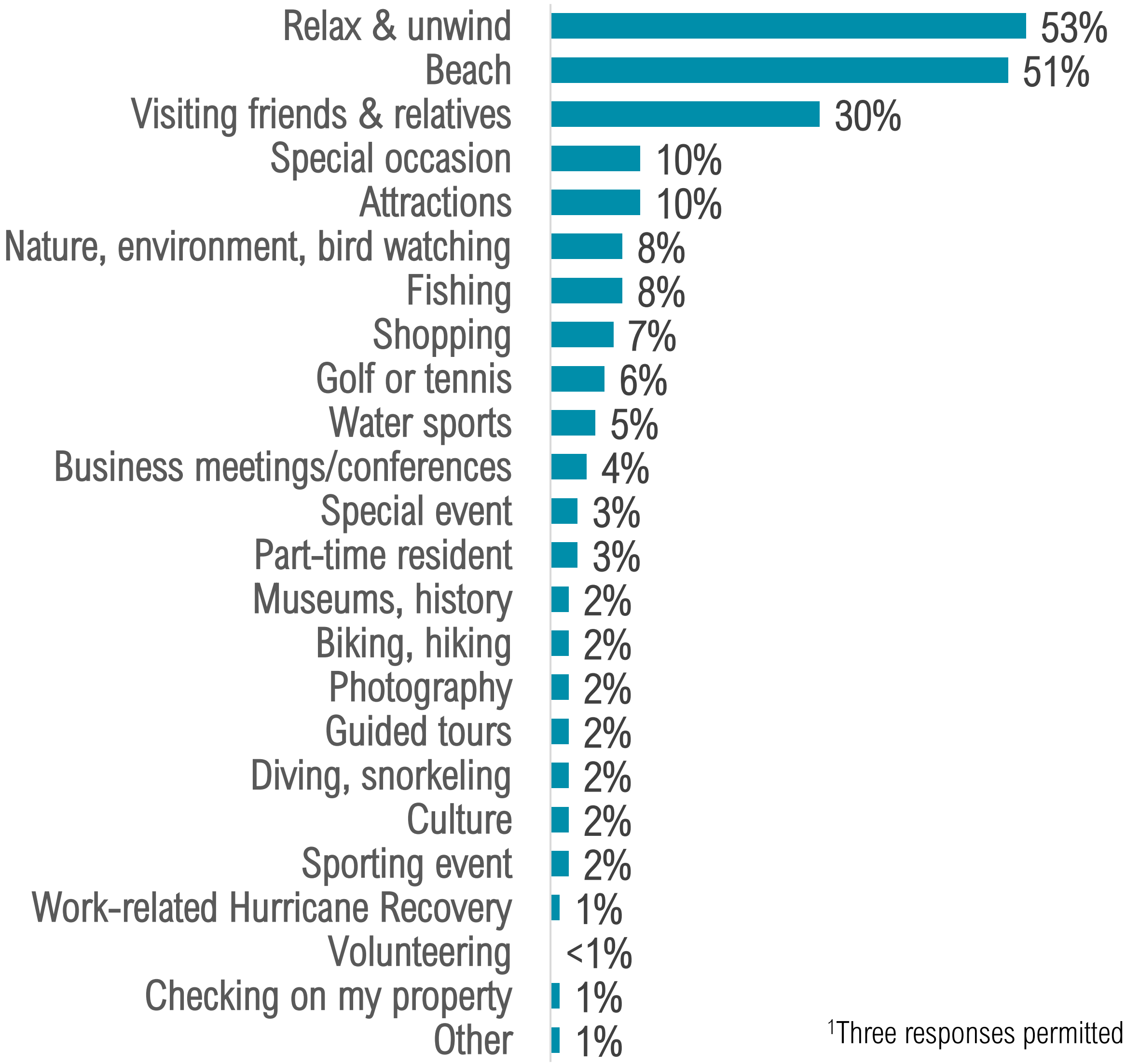
VISITOR PROFILE

53 Median Age	31% First-time Visitor
$102,900 Median Household Income	26% Traveled With Children
2.9 Travel Party Size	5.7 Length Of Stay

REASON FOR VISITING[1]

Data Point: For the second consecutive year, beach and relaxation has increased as the reason for visiting

Insight: This aligns with a national trend of taking vacations with a relaxation focus



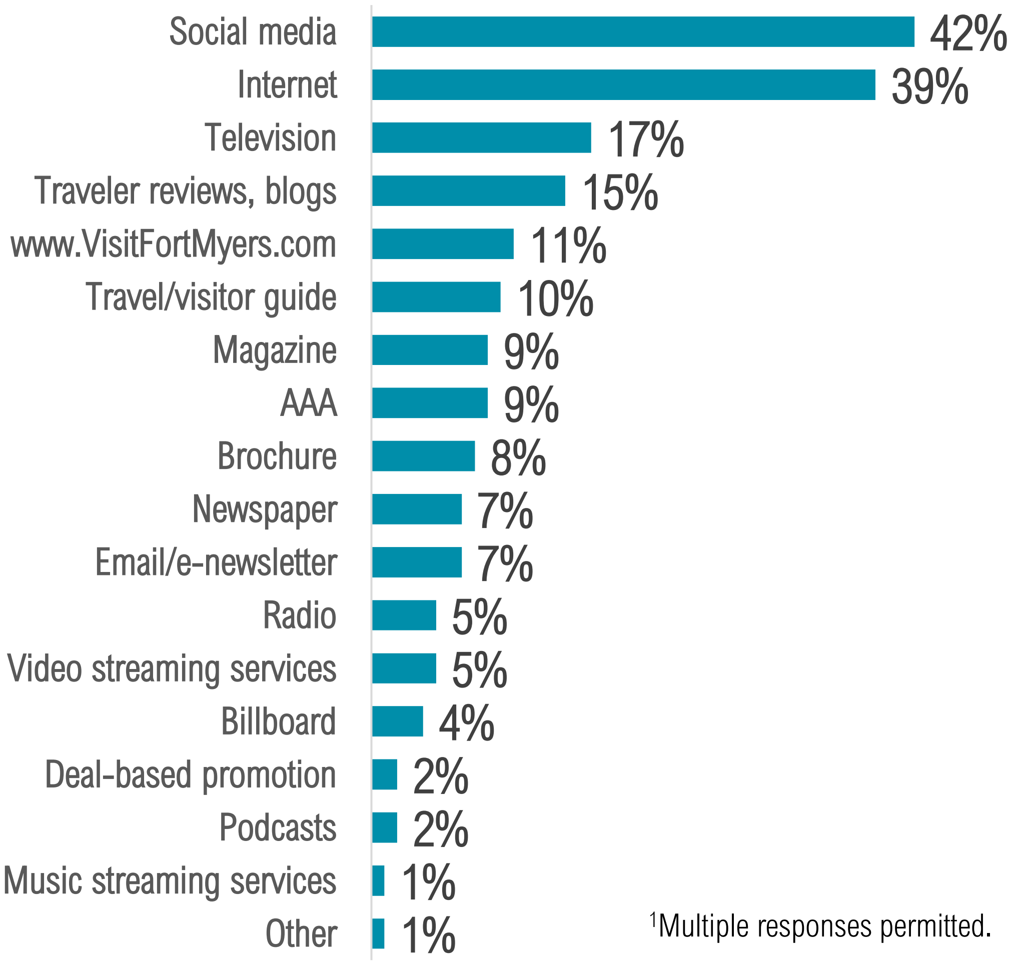
[1] Three responses permitted.

PROMOTIONS RECALL[1]

Data Point: More visitors noticed ads on social media, a trend seen across many Florida destinations

Insight: Social media's role in the vacation planning continues to grow and marketing/PR plans should grow with it

BASE: 32% of visitors who recalled promotions


Source of Promotion

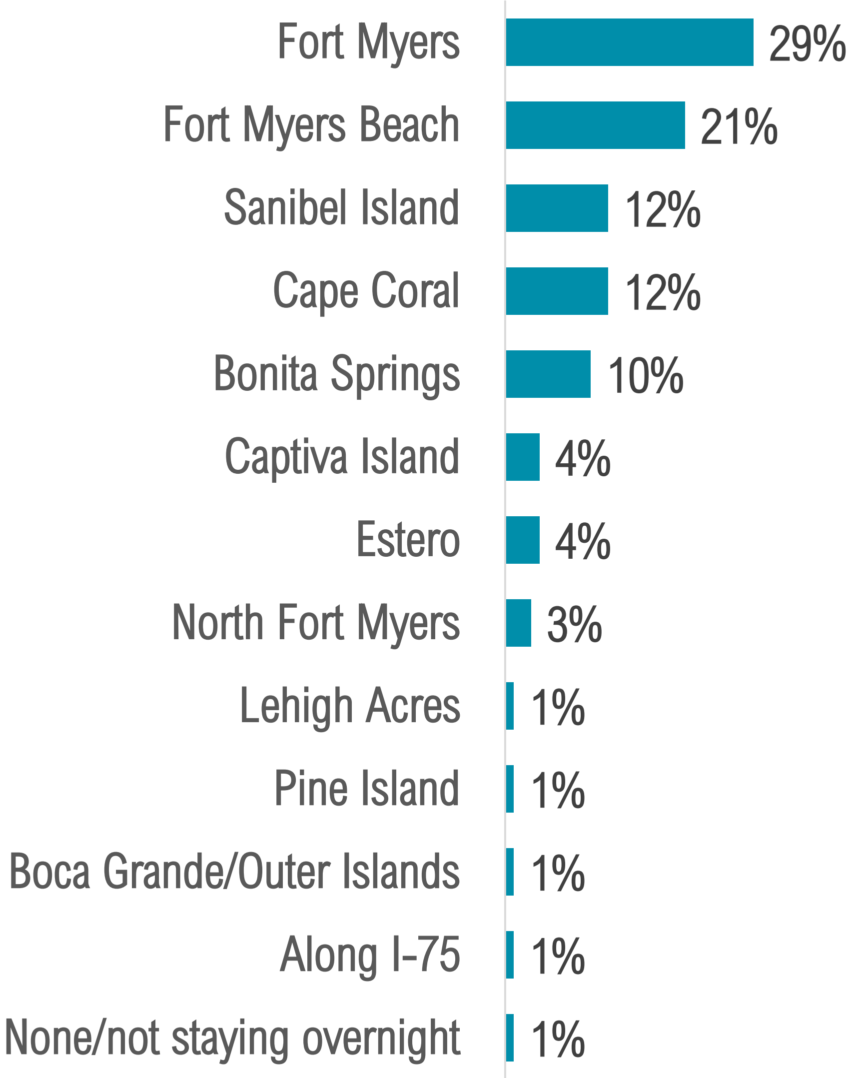
Social media	42%
Internet	39%
Television	17%
Traveler reviews, blogs	15%
www.VisitFortMyers.com	11%
Travel/visitor guide	10%
Magazine	9%
AAA	9%
Brochure	8%
Newspaper	7%
Email/e-newsletter	7%
Radio	5%
Video streaming services	5%
Billboard	4%
Deal-based promotion	2%
Podcasts	2%
Music streaming services	1%
Other	1%

[1] Multiple responses permitted.

COMMUNITY STAYED

Data Point: In another hurricane recovery trend, more visitors are staying in Fort Myers Beach and Sanibel Island

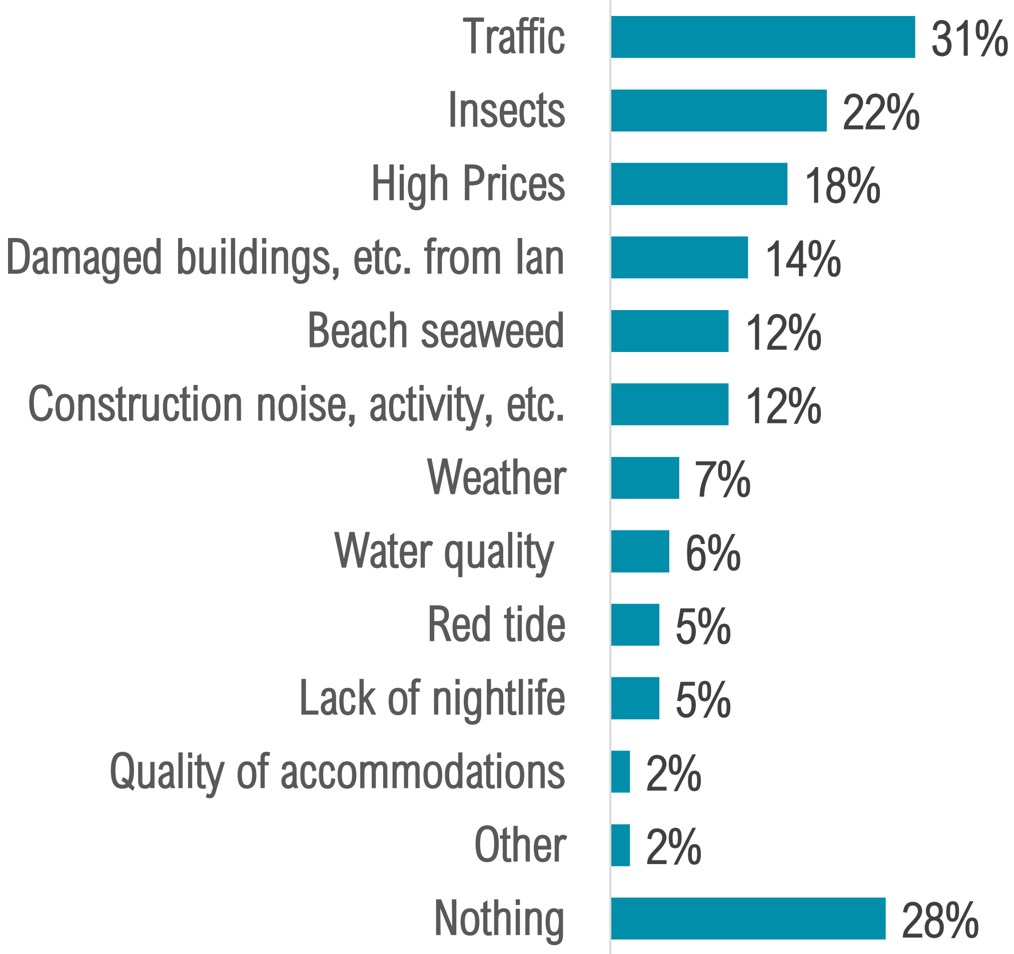
Insight: As recovery on the coast continues, visitor booking behavior is changing accordingly



LEAST LIKED FEATURES[1]

Data Point: 10% points fewer visitors mentioned the area’s hurricane damage as a least liked feature

Insight: Many of the data points presented show a significant in visitor perception related to the overall recovery of the Fort Myers area

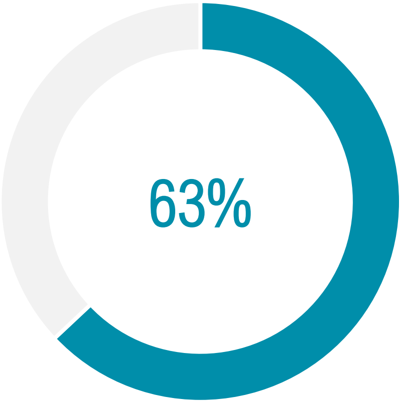


[1] Multiple responses permitted.

During this specific visit, which features have you like the LEAST about our area?

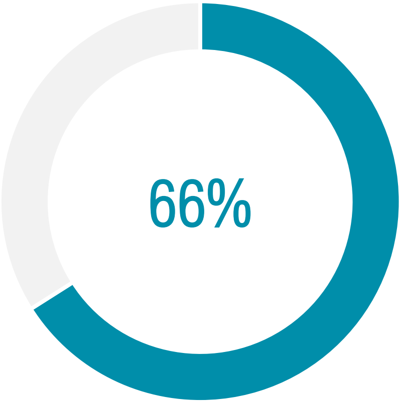
SATISFACTION STATISTICS

All satisfaction metrics were up significantly year-over-year



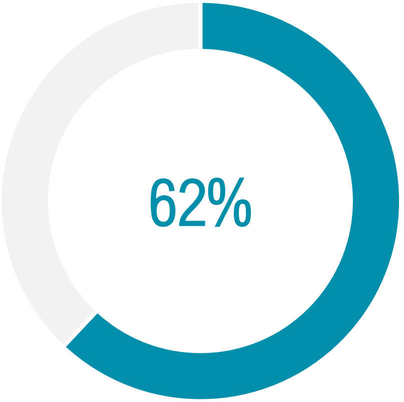
VERY SATISFIED

63% of visitors reported being very satisfied with their experience



VERY LIKELY TO RETURN

66% of visitors said they would be very likely to return to the area



VERY LIKELY TO RECOMMEND

62% of visitors would be very likely to recommend the area to friends and family over other vacation areas

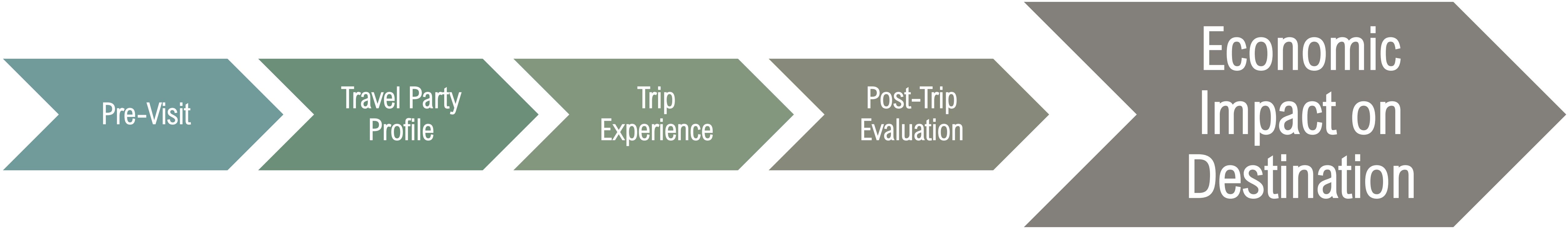
TOP REASONS FOR CHOOSING REDACTED*

- “I love this area for its tropical weather: blue skies and sunshine!”
- “Sitting on my balcony overlooking the water and listening to the sound of the waves was unbeatable.”
- “The walkable downtown makes it easy to get wherever you want.”
- “The beaches are pristine, and the waters are calm and clear.”
- “It’s less crowded than other areas in Florida, which made me feel safer!”

*Open-ended responses

Detailed Findings

VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION



Pre-Visit

Travel Party Profile

Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

TOURISM SNAPSHOT: KEY METRICS APR-JUN 2024 VS. 2025

Visitor & Lodging Statistics	Apr - Jun 2024[3]	Apr - Jun 2025	% Change '24-'25
Visitors	808,900	862,700	+ 6.7%
Visitor Days	4,999,000	4,926,000	- 1.5%
Room Nights	1,029,300	1,097,600	+ 6.6%
Direct Expenditures[1]	$747,288,600	$770,867,500	+ 3.2%
Total Economic Impact[2]	$1,158,297,300	$1,193,154,900	+ 3.0%

[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] Spending and Economic Impact data has been slightly revised to reflect an updated IMPLAN dataset.

TOURISM SNAPSHOT: KEY METRICS FISCAL YEAR-TO-DATE

Visitor & Lodging Statistics	FYTD 2024[3]	FYTD 2025	% Change '24-'25
Visitors	2,443,200	2,511,900	+ 2.8%
Visitor Days	15,595,000	16,530,700	+ 6.0%
Room Nights	3,457,000	3,658,400	+ 5.8%
Direct Expenditures[1]	$2,453,510,000	$2,572,450,200	+ 4.8%
Total Economic Impact[2]	$3,837,039,100	$4,012,379,400	+ 4.6%

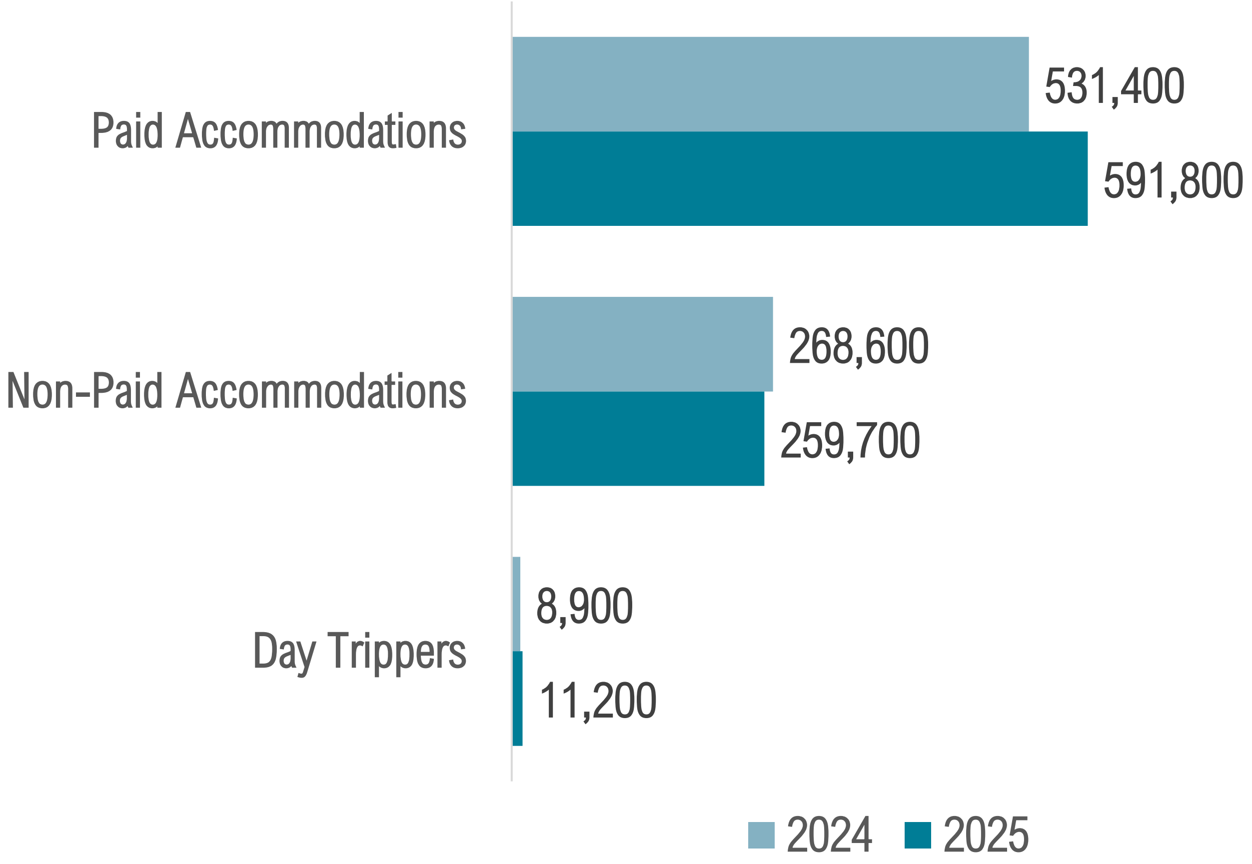
[1] Includes: accommodations, restaurants, entertainment, shopping, transportation, groceries, and "other" expenses.

[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] Spending and Economic Impact data has been slightly revised to reflect an updated IMPLAN dataset.

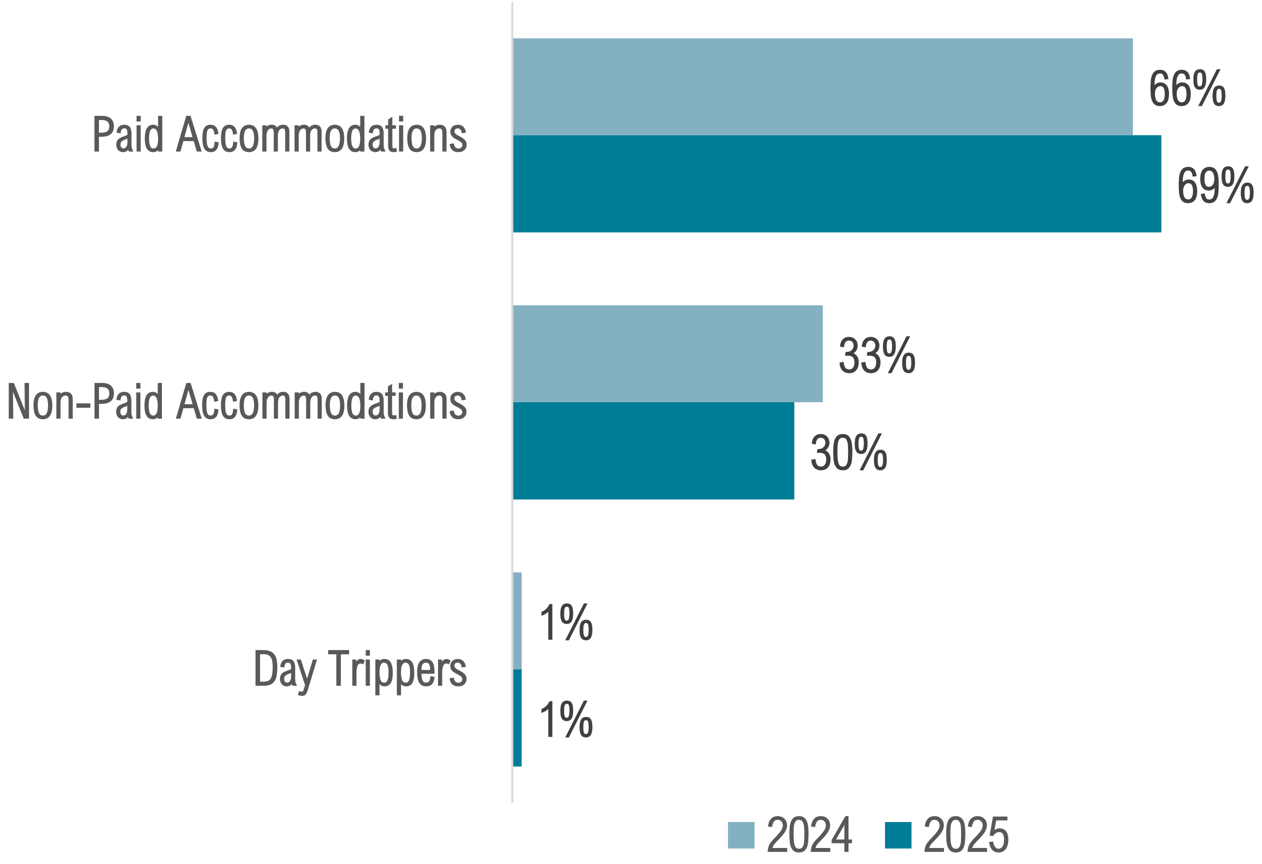
NUMBER OF VISITORS

There were 862,700[1] visitors to the Fort Myers area in Apr - Jun 2025 (+6.7% from 2024).



VISITOR TYPE

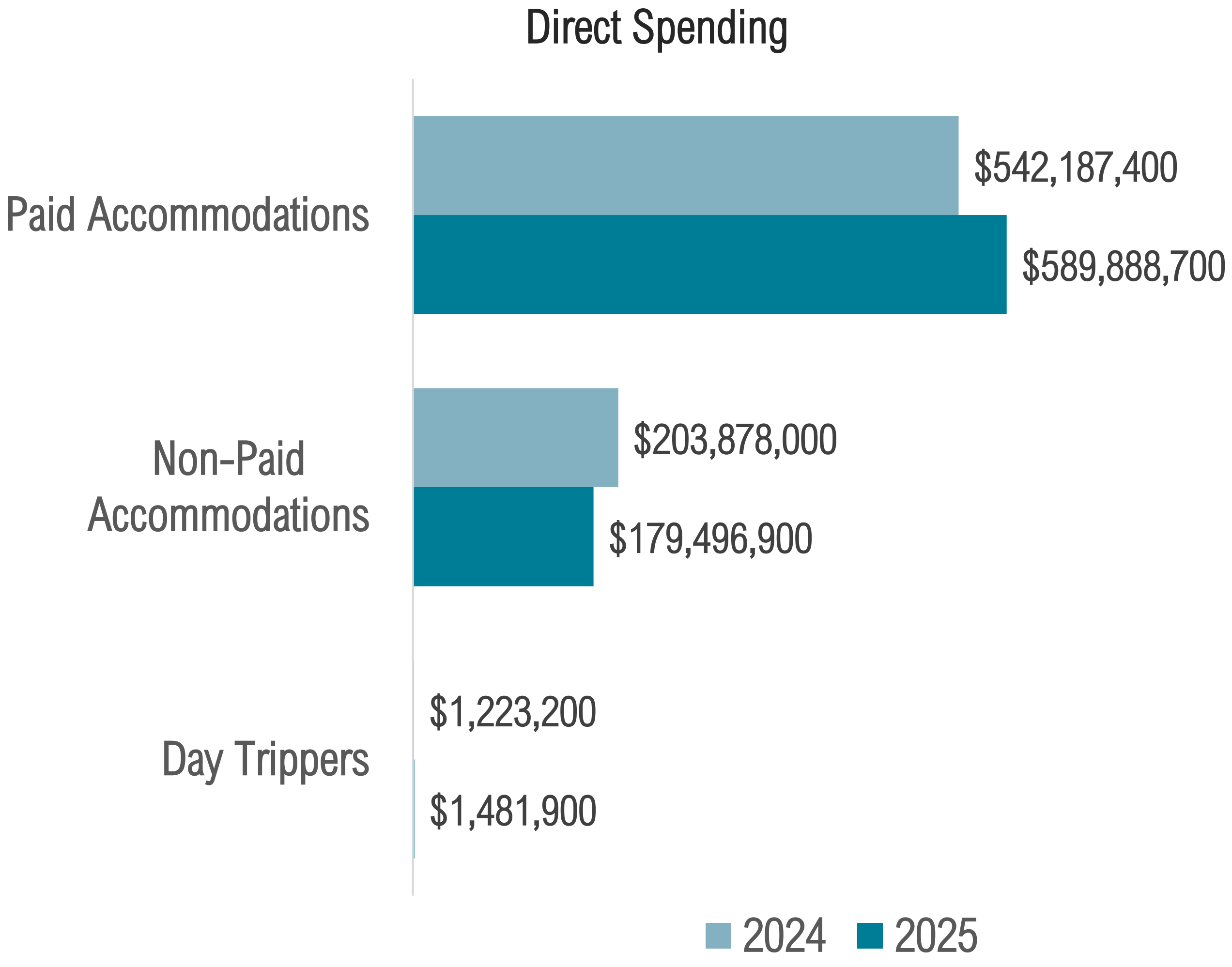
Visitors staying in paid accommodations accounted for over 2 in 3 visitors.



VISITOR EXPENDITURES BY VISITOR TYPE

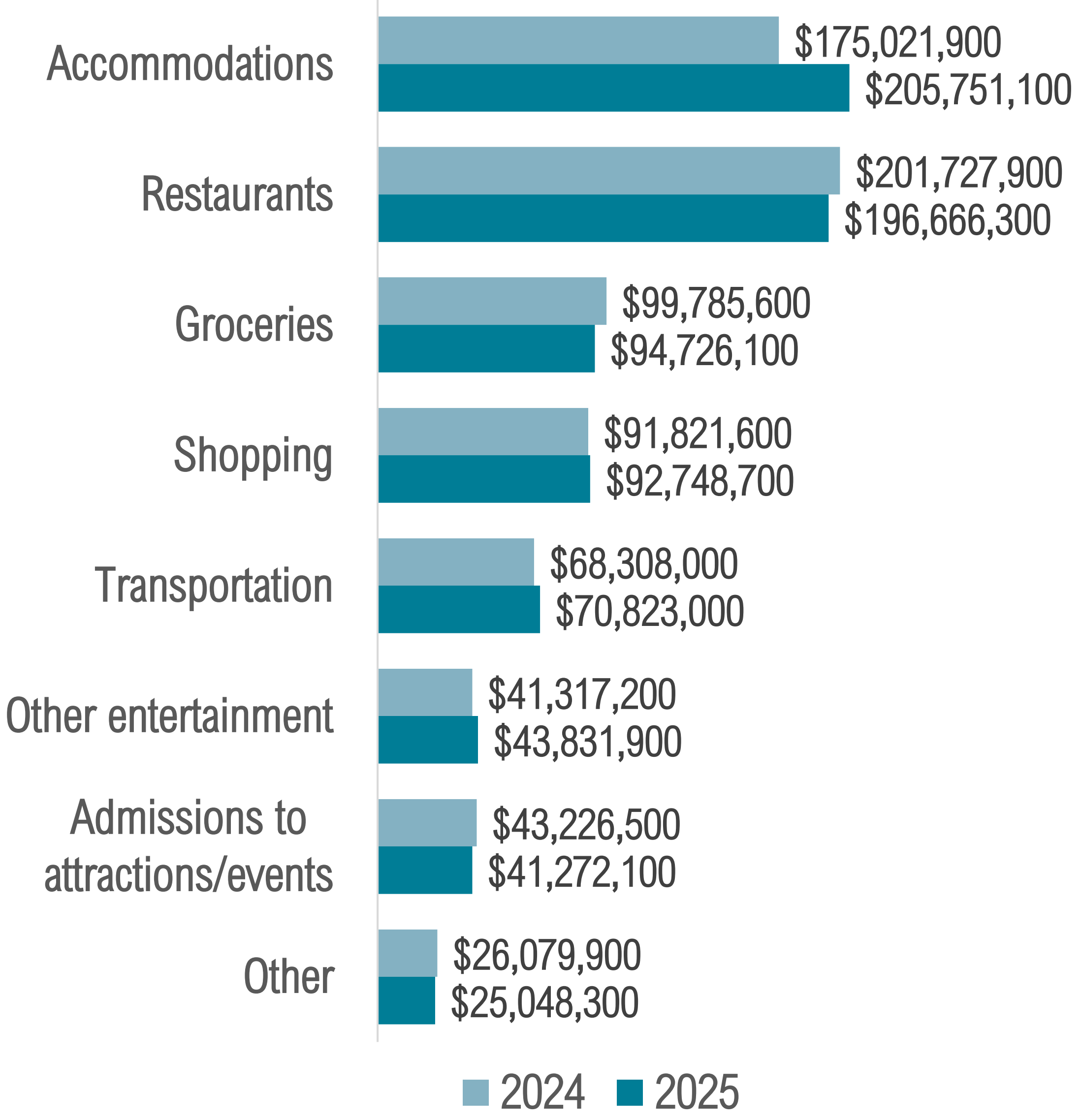
Apr - Jun visitors spent **$770,867,500** in the Fort Myers area, resulting in a total economic impact of **$1,193,154,900**, up 3.0% from 2024.

Visitors staying in paid accommodations accounted for 69% of all visitors and 77% of all spending.



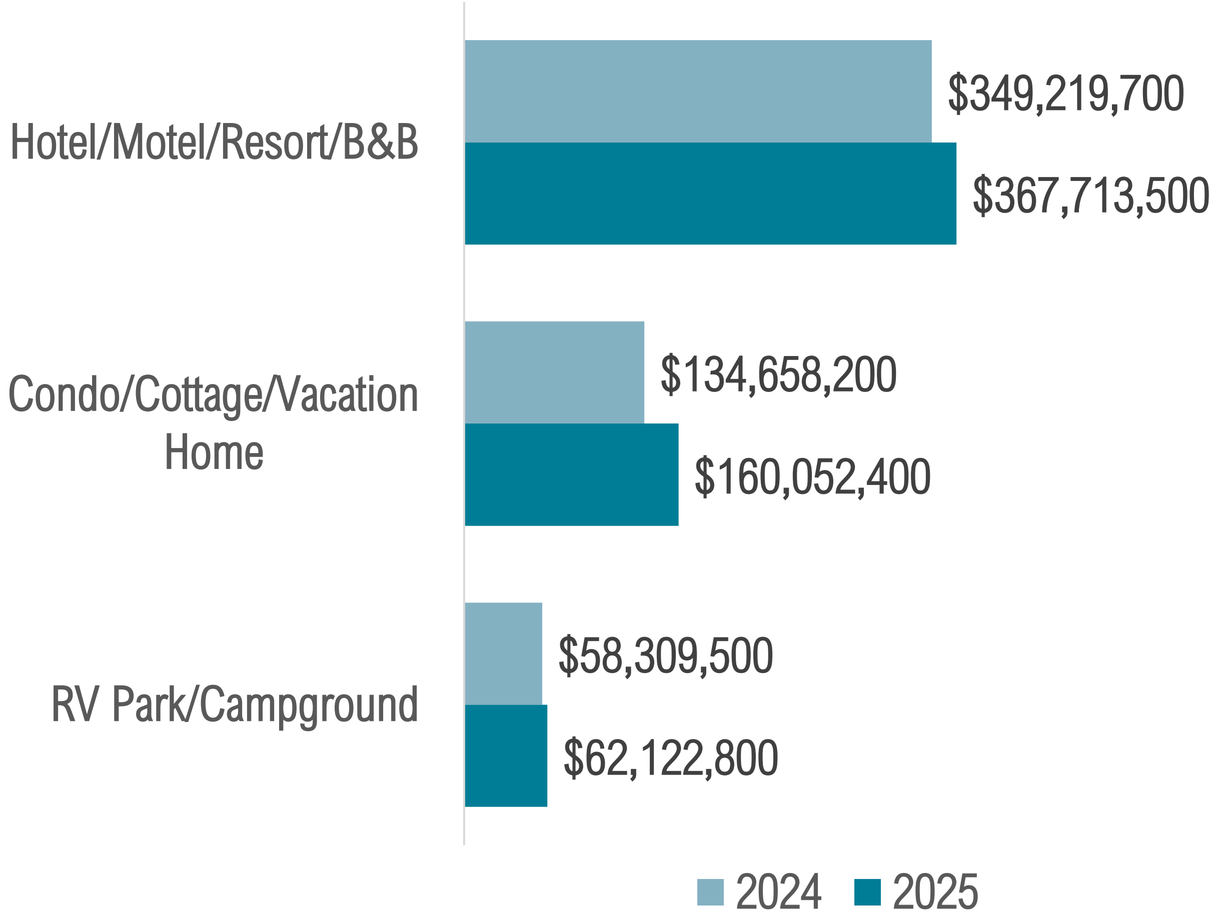
VISITOR EXPENDITURES BY SPENDING CATEGORY

Of the $770,867,500 visitors spent in the Fort Myers area, 27% was spent on accommodations and 26% was spent on restaurants, accounting for over half of all visitor spending.



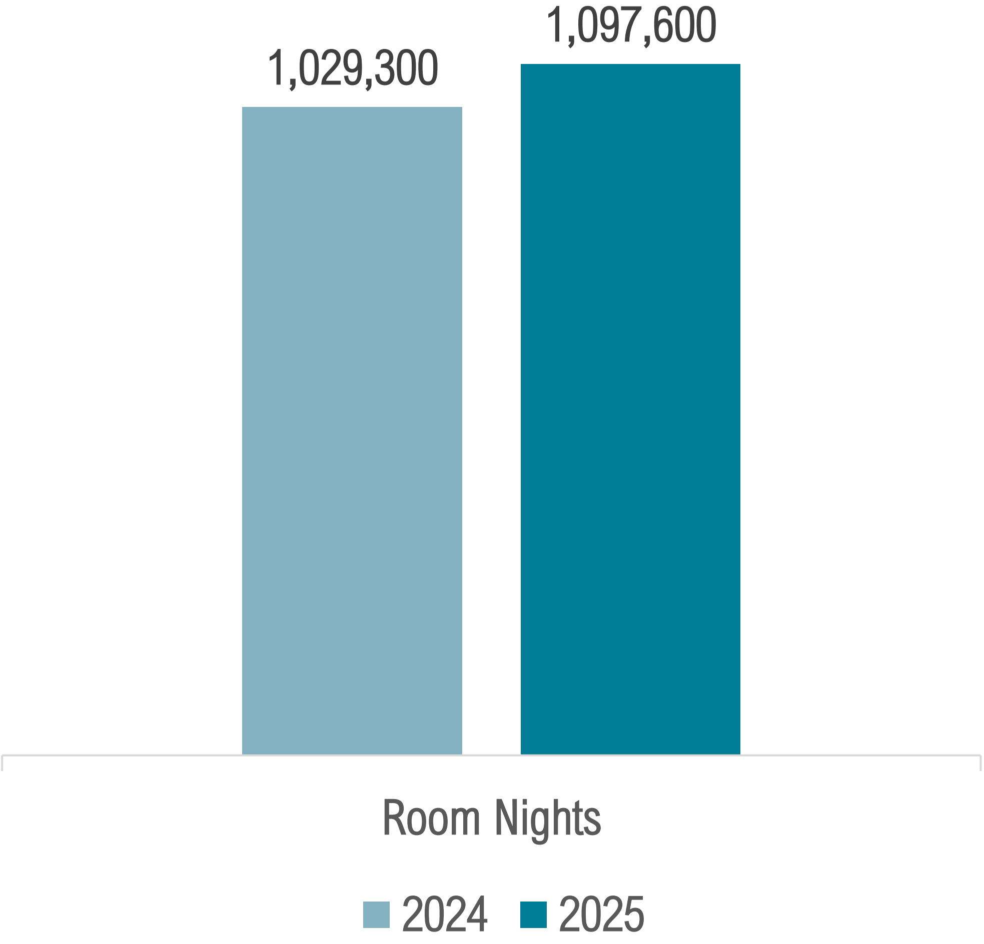
VISITOR EXPENDITURES BY LODGING TYPE

Apr - Jun visitors staying in paid accommodations spent **$589,888,700** in the Fort Myers area.



ROOM NIGHTS GENERATED

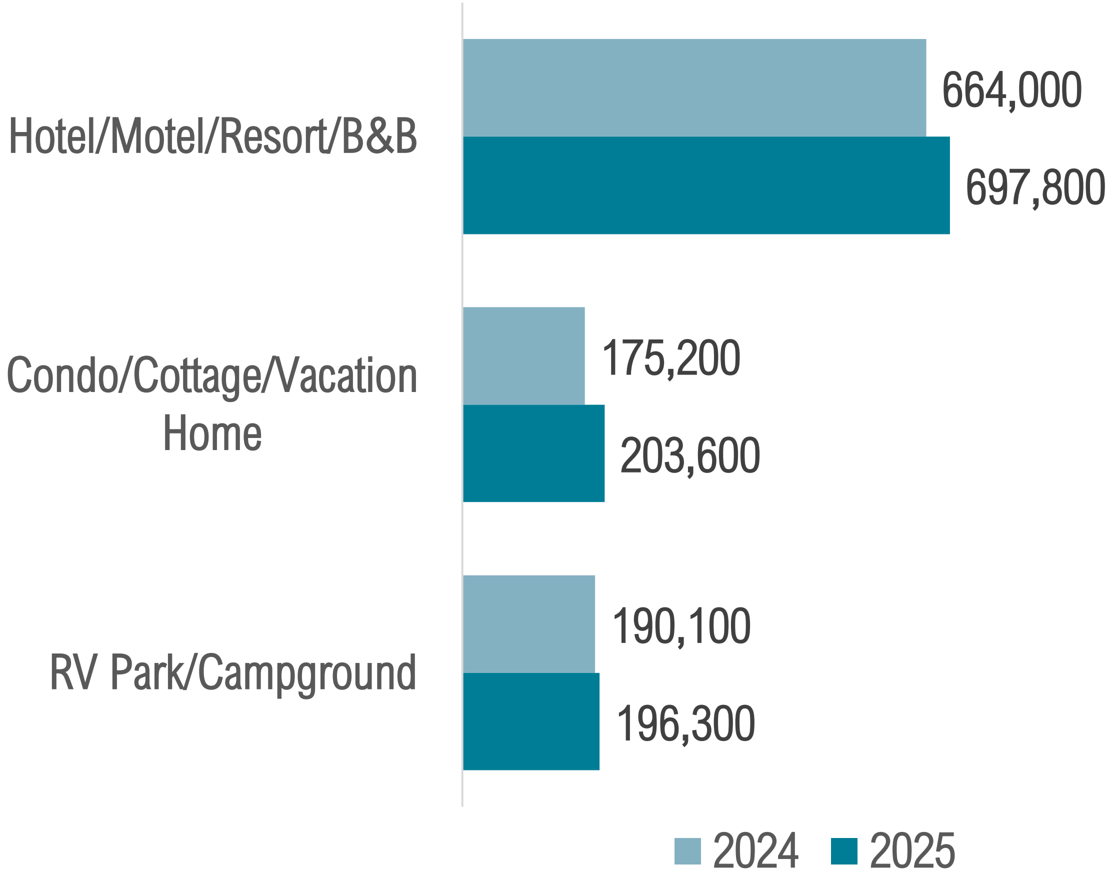
Apr - Jun visitors spent **1,097,600**[1] nights in Fort Myers area hotels, resorts, condos, rental houses, RV parks, etc. (+6.6% from 2024).



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

ROOM NIGHTS GENERATED

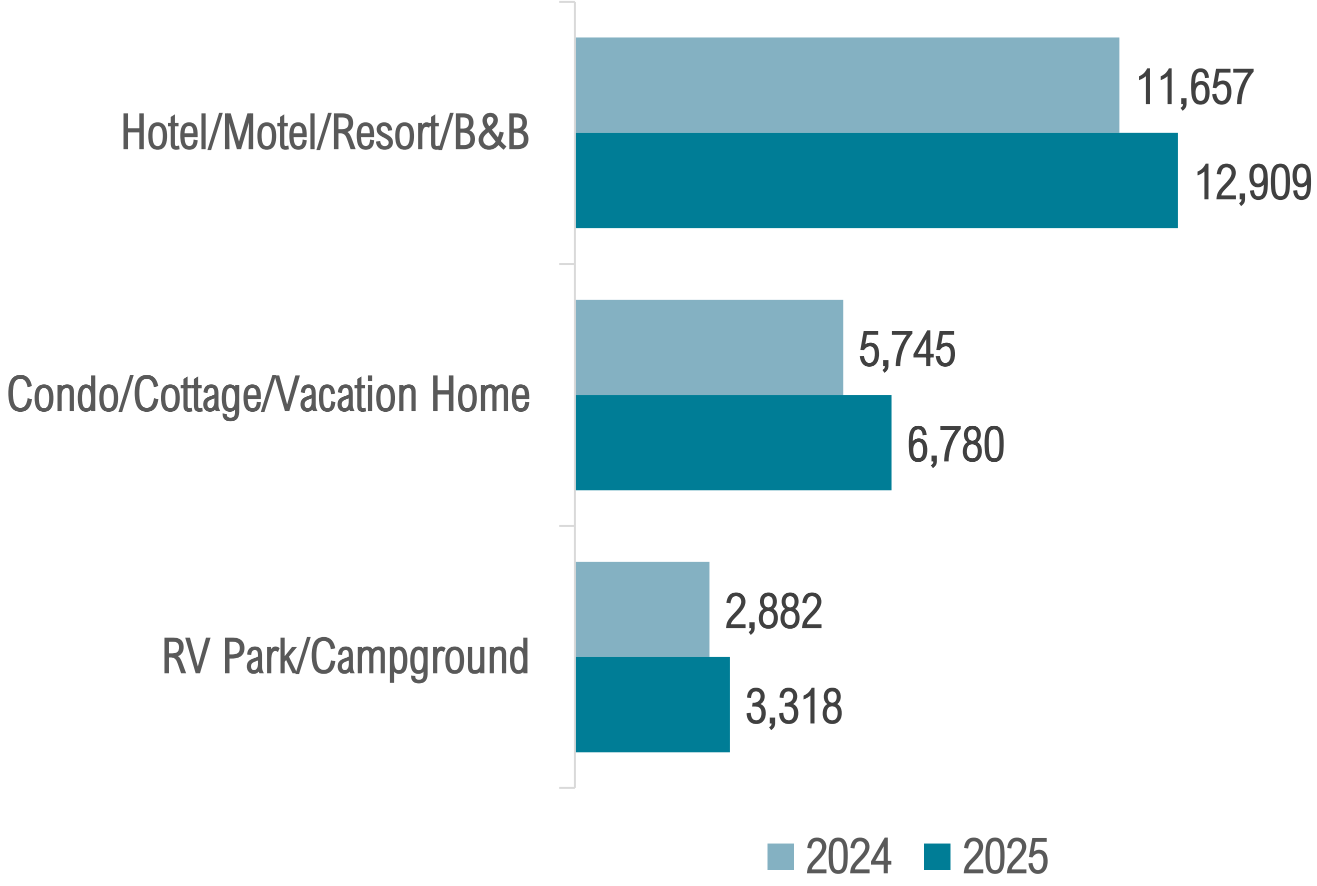
Hotels, motels, etc. accounted for **nearly 2 in 3** room nights spent in the Fort Myers area, while RV parks/campgrounds accounted for **nearly 1 in 5** room nights and vacation rentals accounted for the remaining **19%** of nights that visitors spent in the area.



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

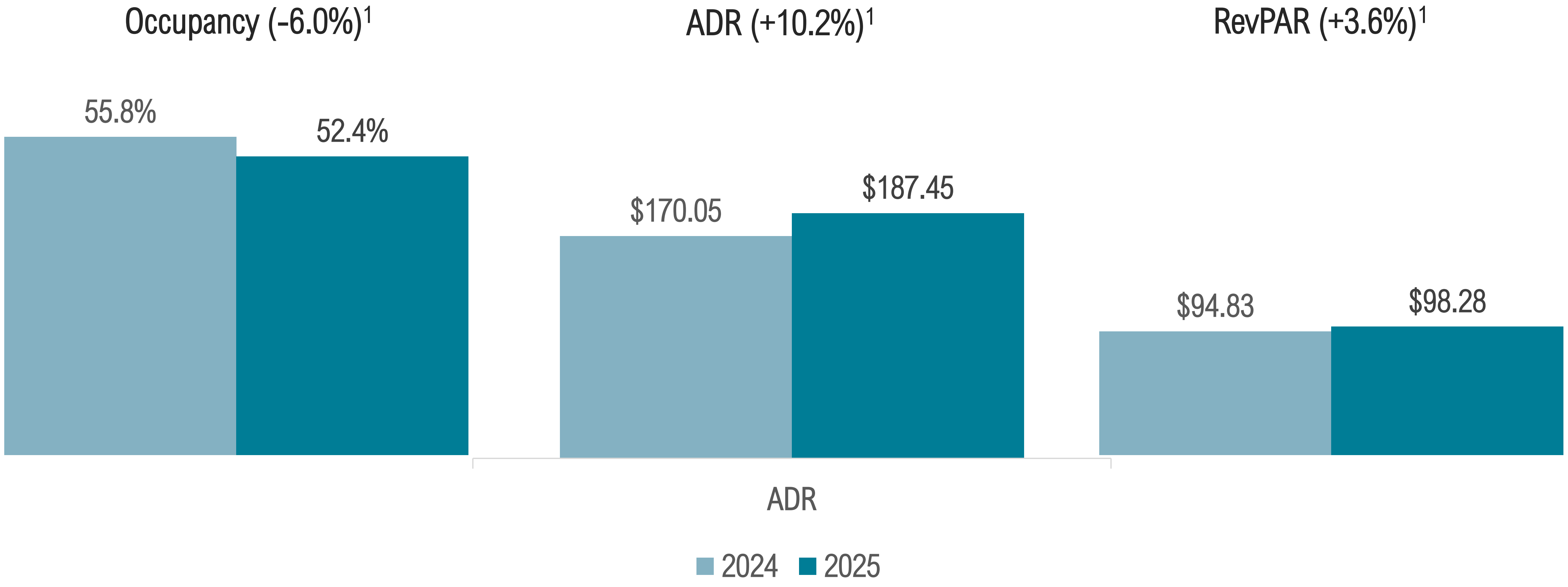
AVAILABLE UNITS

There were **23,006**[1] available units in Apr - Jun 2025 vs. 20,284 in 2024 (+13.4%). **Over half** of the units available were from hotels, motels, etc.



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

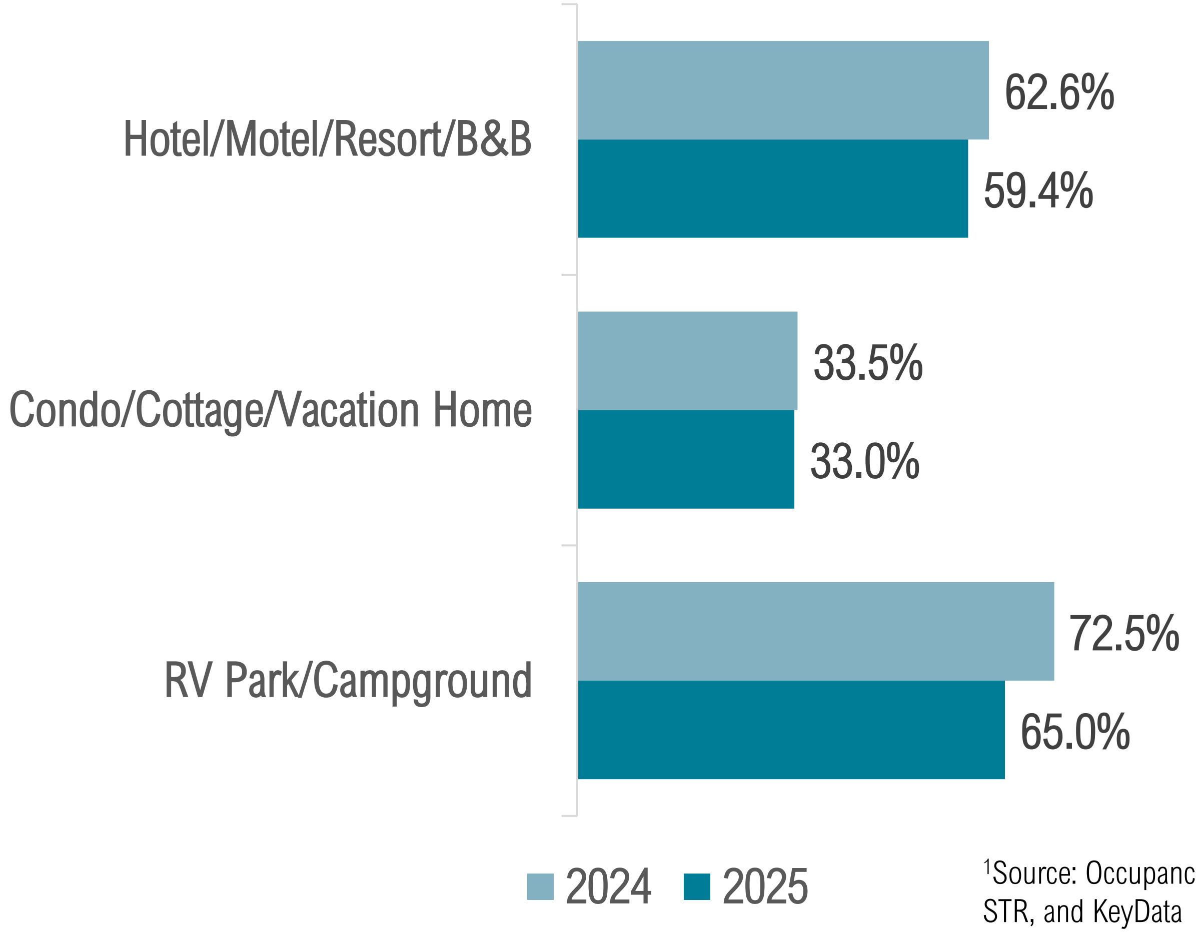
OCCUPANCY, ADR AND REVPAR



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

OCCUPANCY

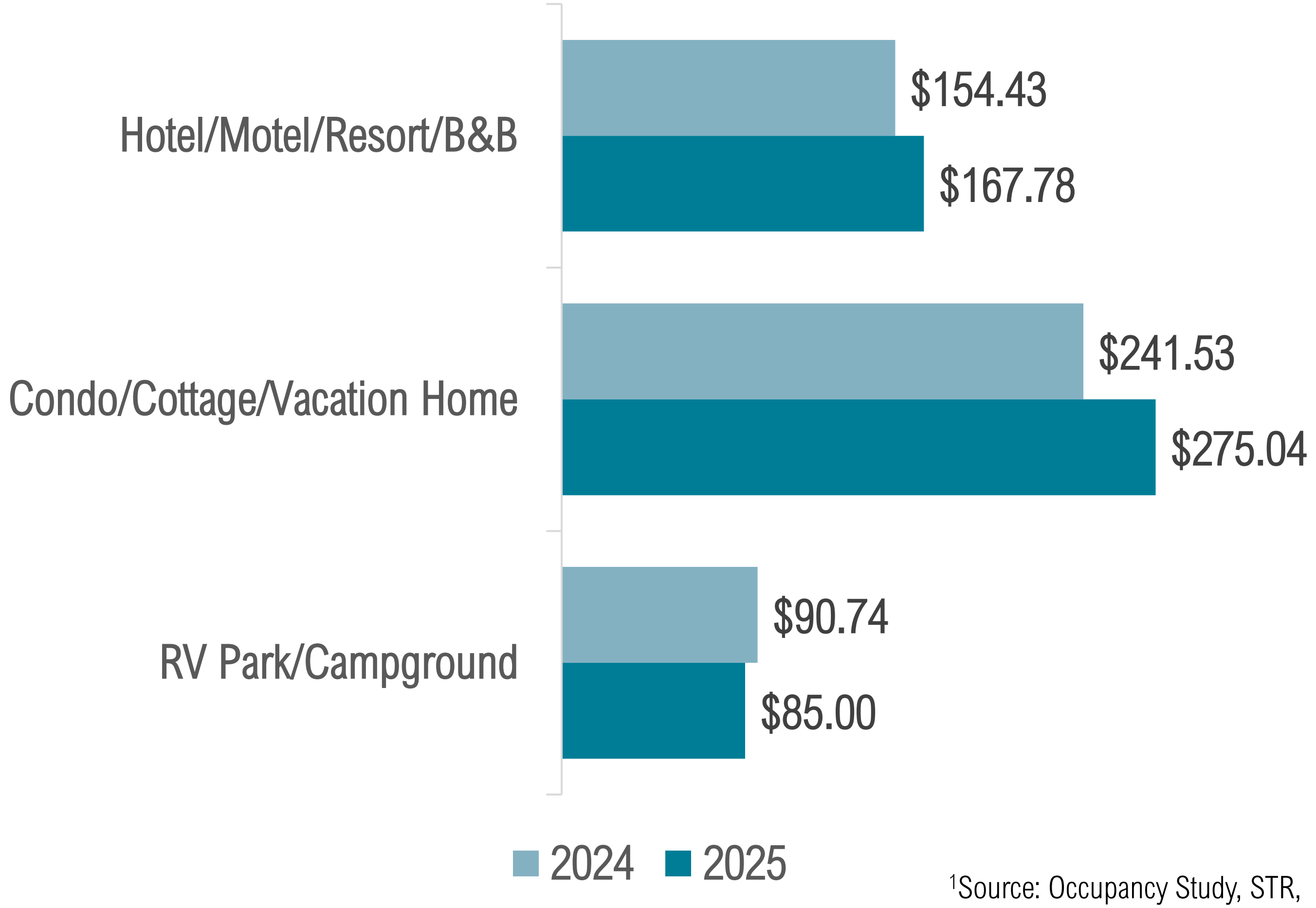
Average occupancy in Apr-Jun was **52.4%**[1] (55.8% in 2024).



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

ADR

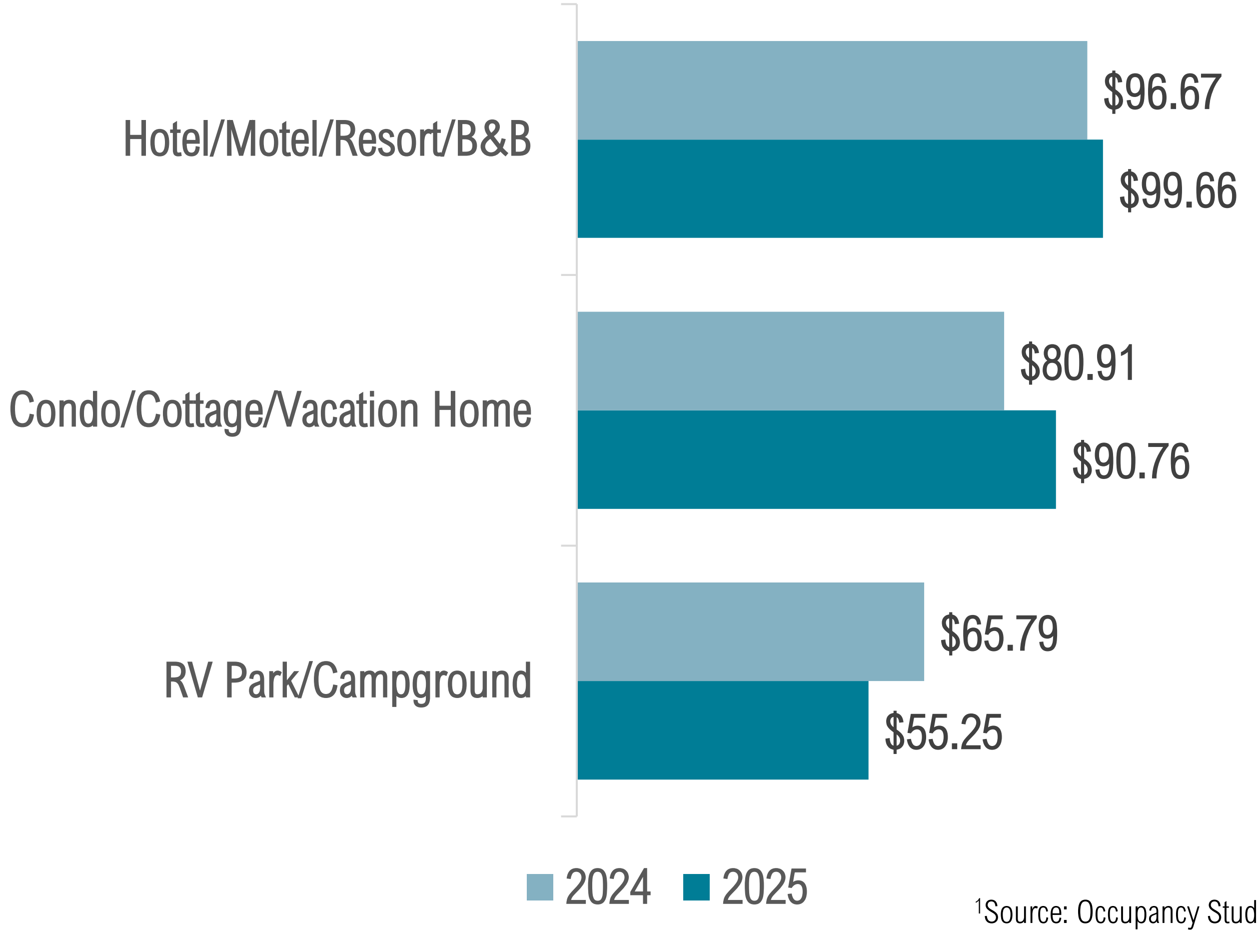
ADR in Apr-June was **$187.45**[1] ($170.05 in 2024).



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

REVPAR

Average RevPAR in Apr-Jun was **$98.28**[1] ($94.83 in 2024).

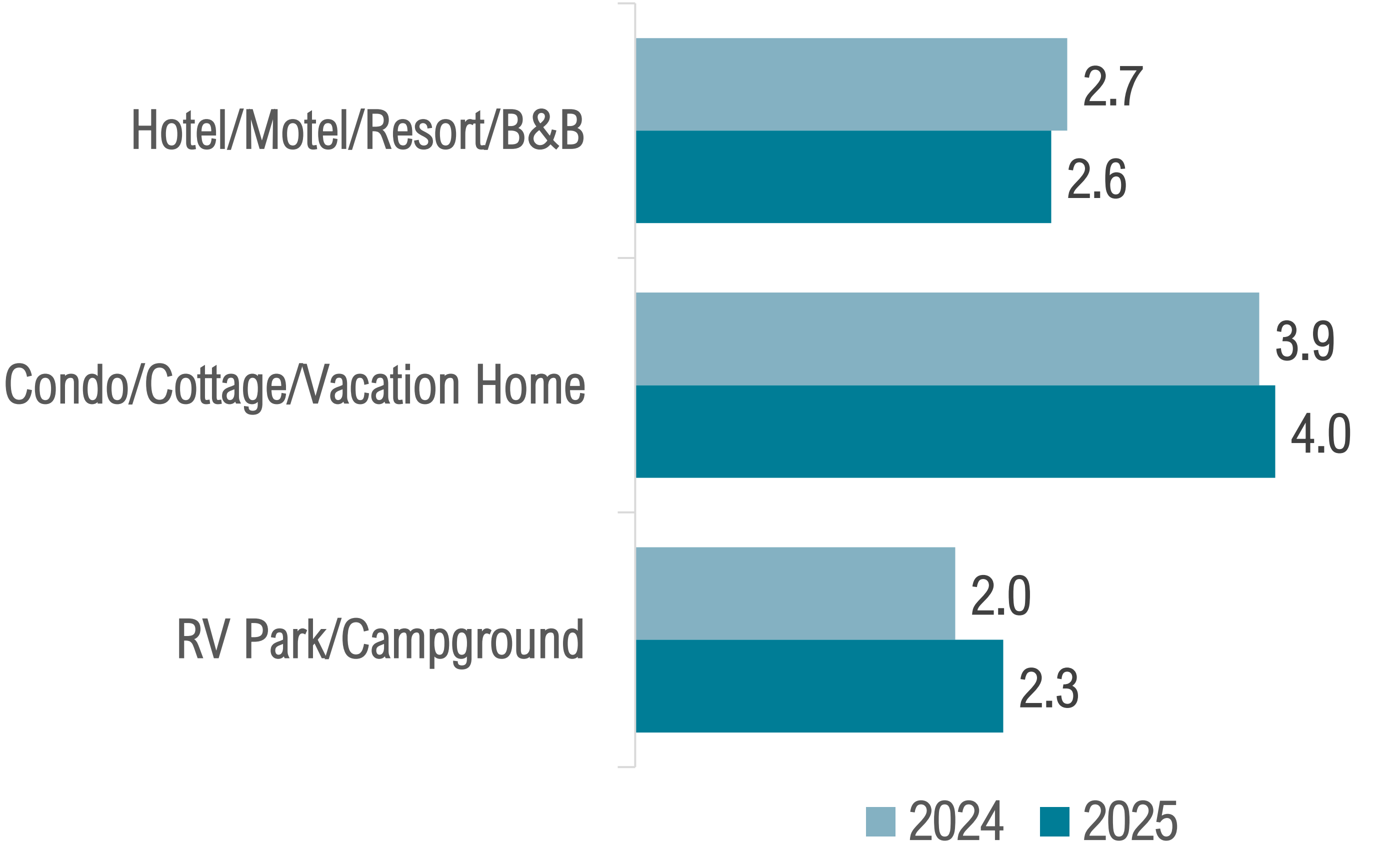


	2024	2025
Hotel/Motel/Resort/B&B	$96.67	$99.66
Condo/Cottage/Vacation Home	$80.91	$90.76
RV Park/Campground	$65.79	$55.25

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

TRAVEL PARTY SIZE

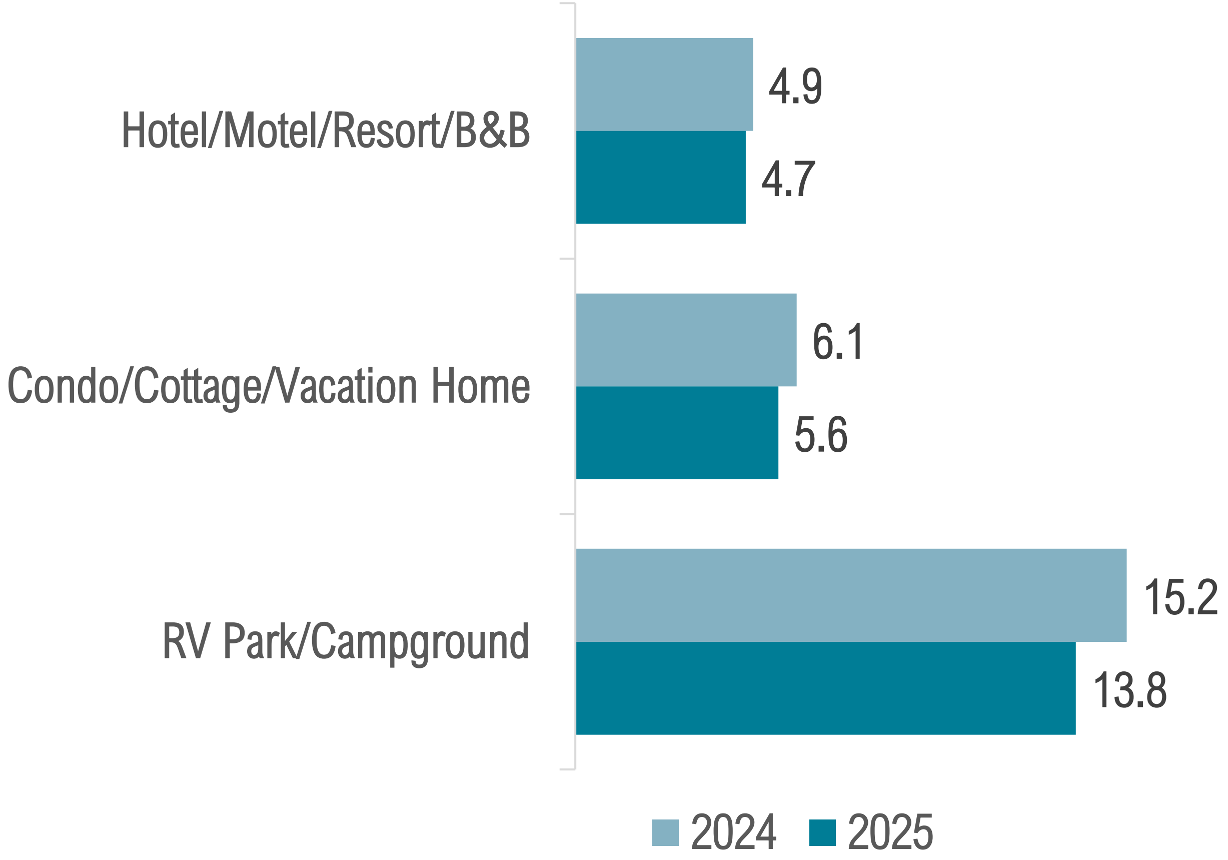
For visitors in paid accommodations, average travel party size in Apr-Jun was **2.9 people**[1] (3.0 people in 2024).



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

LENGTH OF STAY

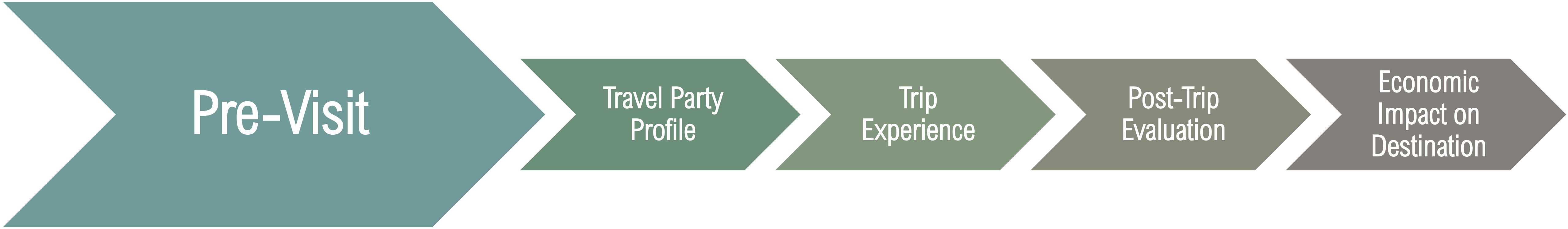
For visitors in paid accommodations, average length of stay in Apr-Jun was **5.7 nights**[1] (6.2 nights in 2024).



	2024	2025
Hotel/Motel/Resort/B&B	4.9	4.7
Condo/Cottage/Vacation Home	6.1	5.6
RV Park/Campground	15.2	13.8

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

Visitor Journey: Pre-Visit



Pre-Visit

Travel Party Profile

Trip Experience

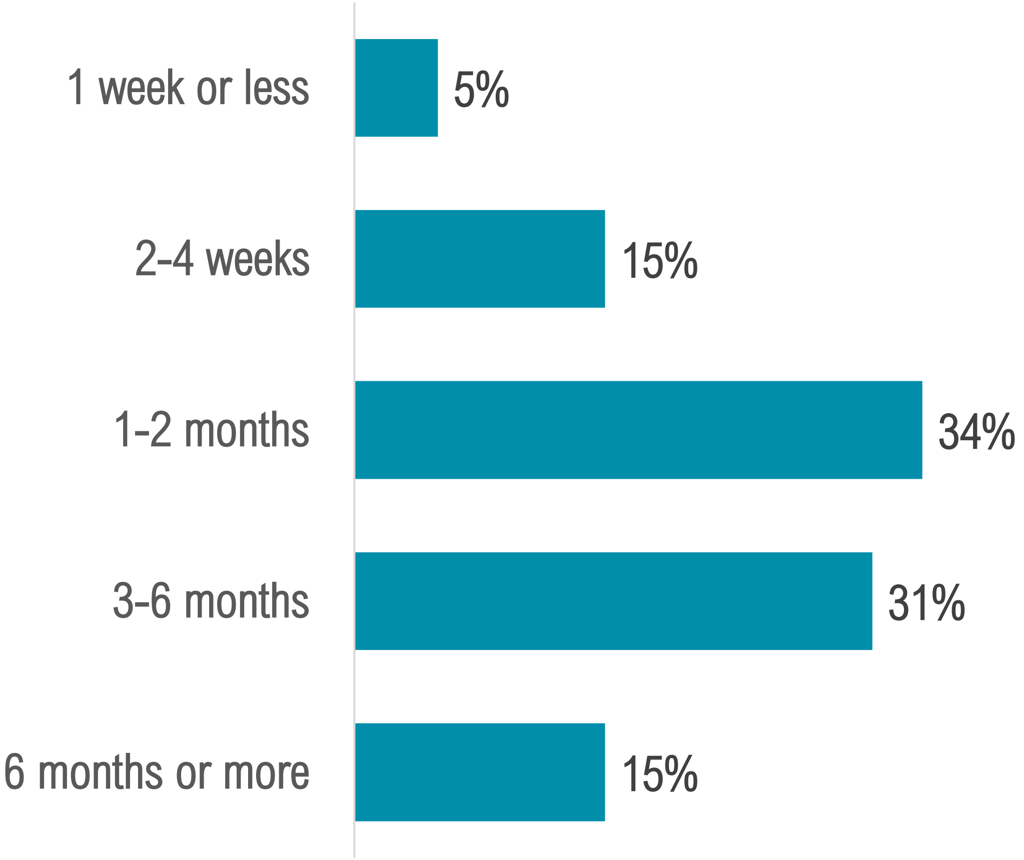
Post-Trip Evaluation

Economic Impact on Destination

TRIP PLANNING CYCLE

Over 1 in 3 visitors planned their trip **1-2 months** in advance, while **over 3 in 10** visitors planned their trip **3-6 months** in advance.

The **average trip planning cycle** lasted **nearly 2 months** (56 days).



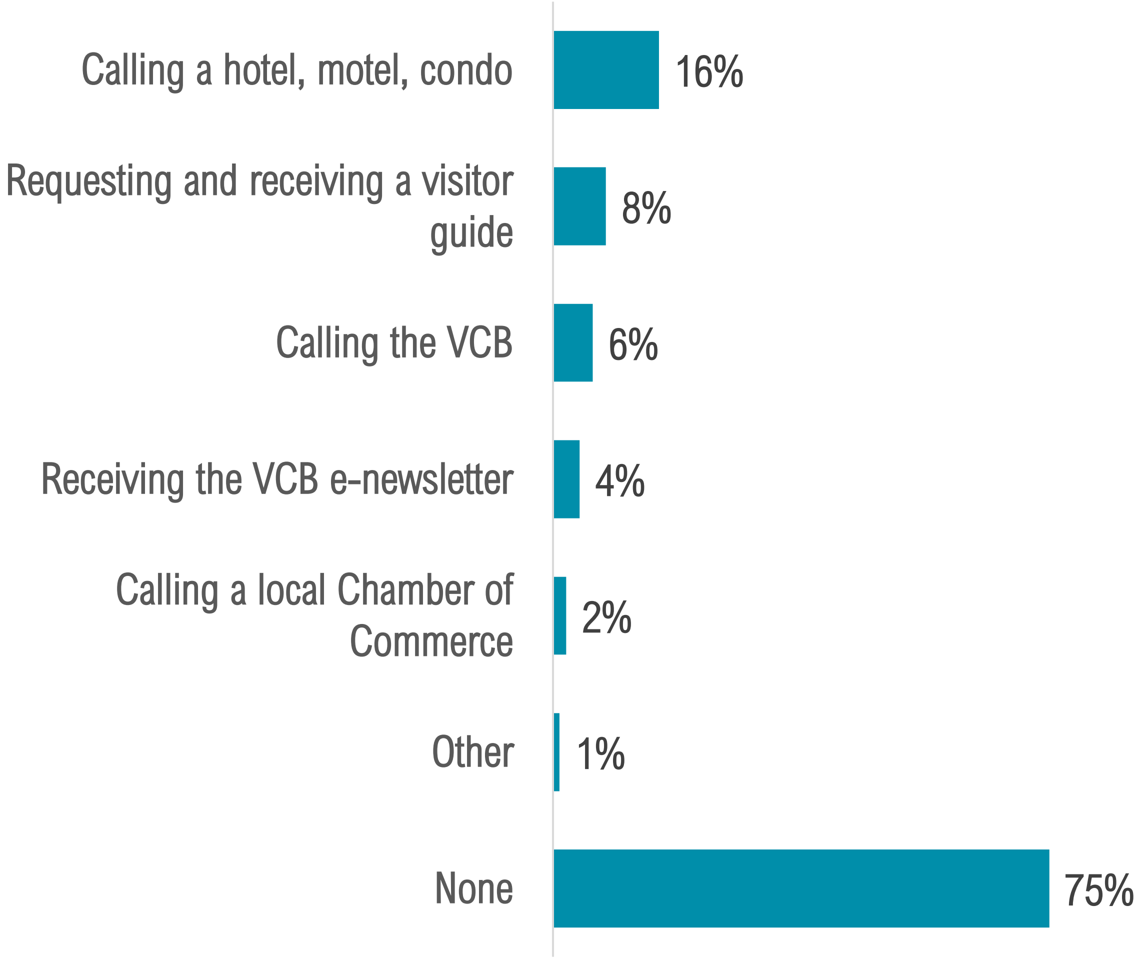
Pre-Visit
Apr - Jun 2025

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 Q3 2025 was slightly higher than in Q3 2024.



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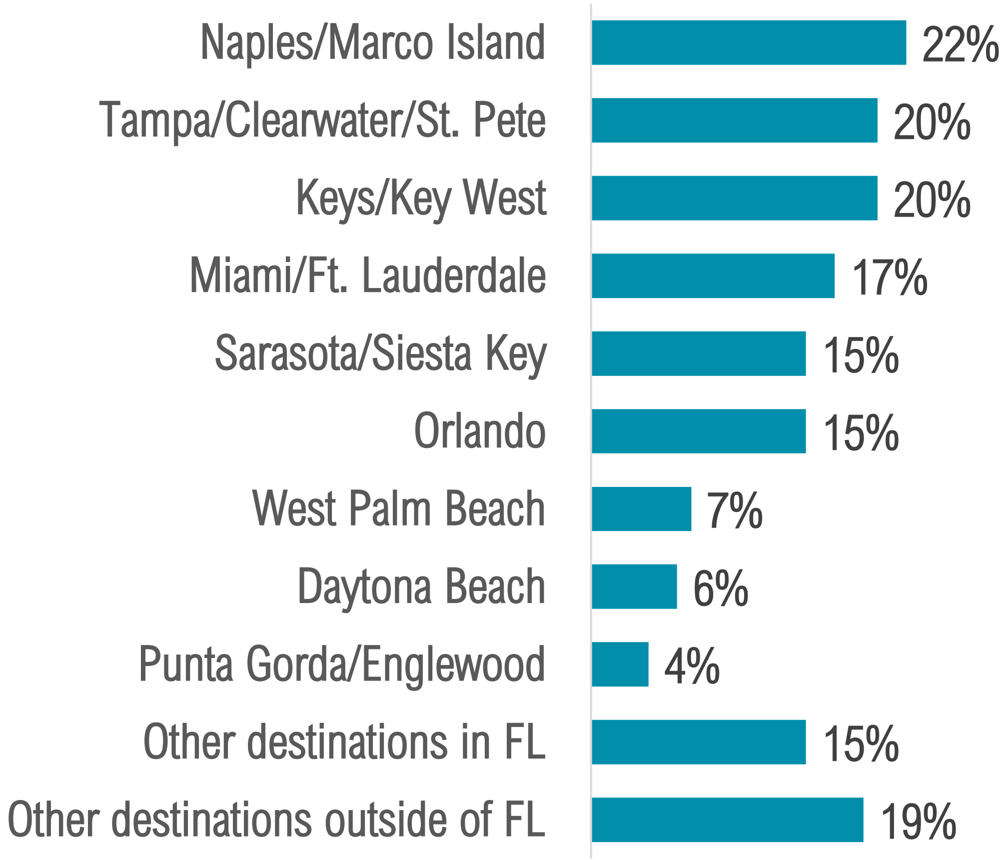
[1] Multiple responses permitted.

TRIP PLANNING: OTHER DESTINATIONS CONSIDERED[1]

Nearly 1 in 5 visitors considered visiting other destinations before selecting the Fort Myers area

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

BASE: 24% of visitors who considered other destinations



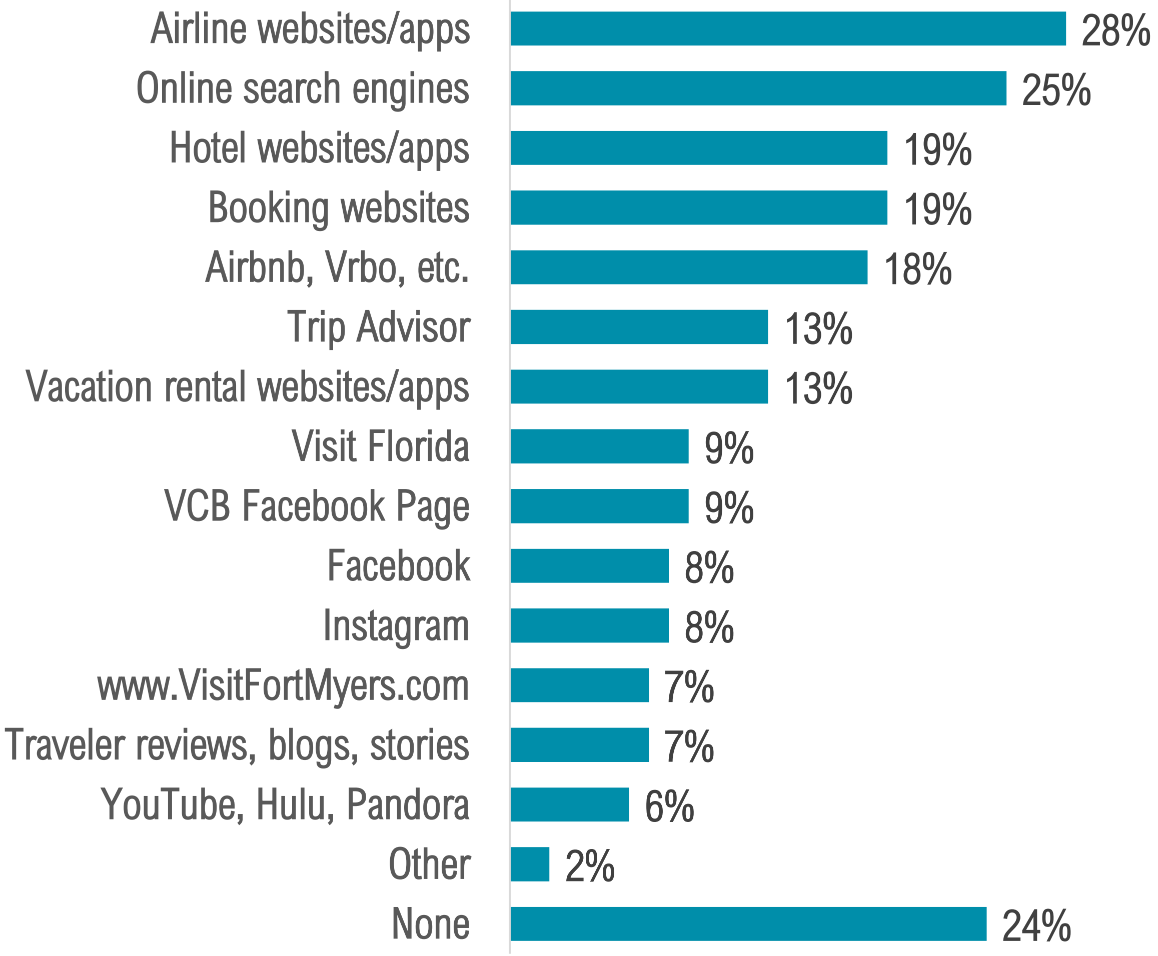
[1] Multiple responses permitted.

TRIP PLANNING: WEBSITES/APPS USED[1]

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

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

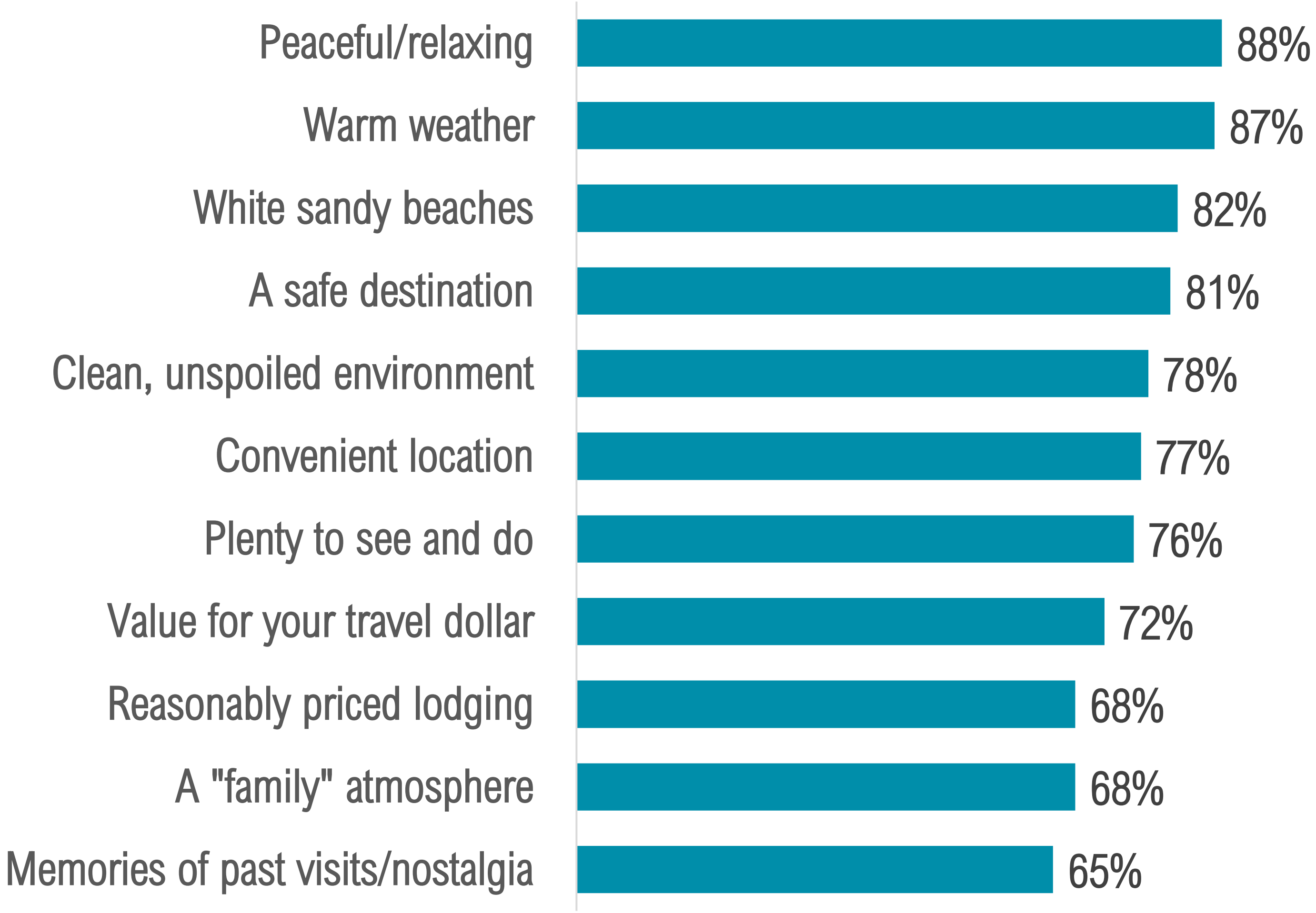
Nearly 2 in 5 visitors used either **hotel websites/apps**, **booking websites**, or **Airbnb/Vrbo** to plan their trips.



[1] Multiple responses permitted.

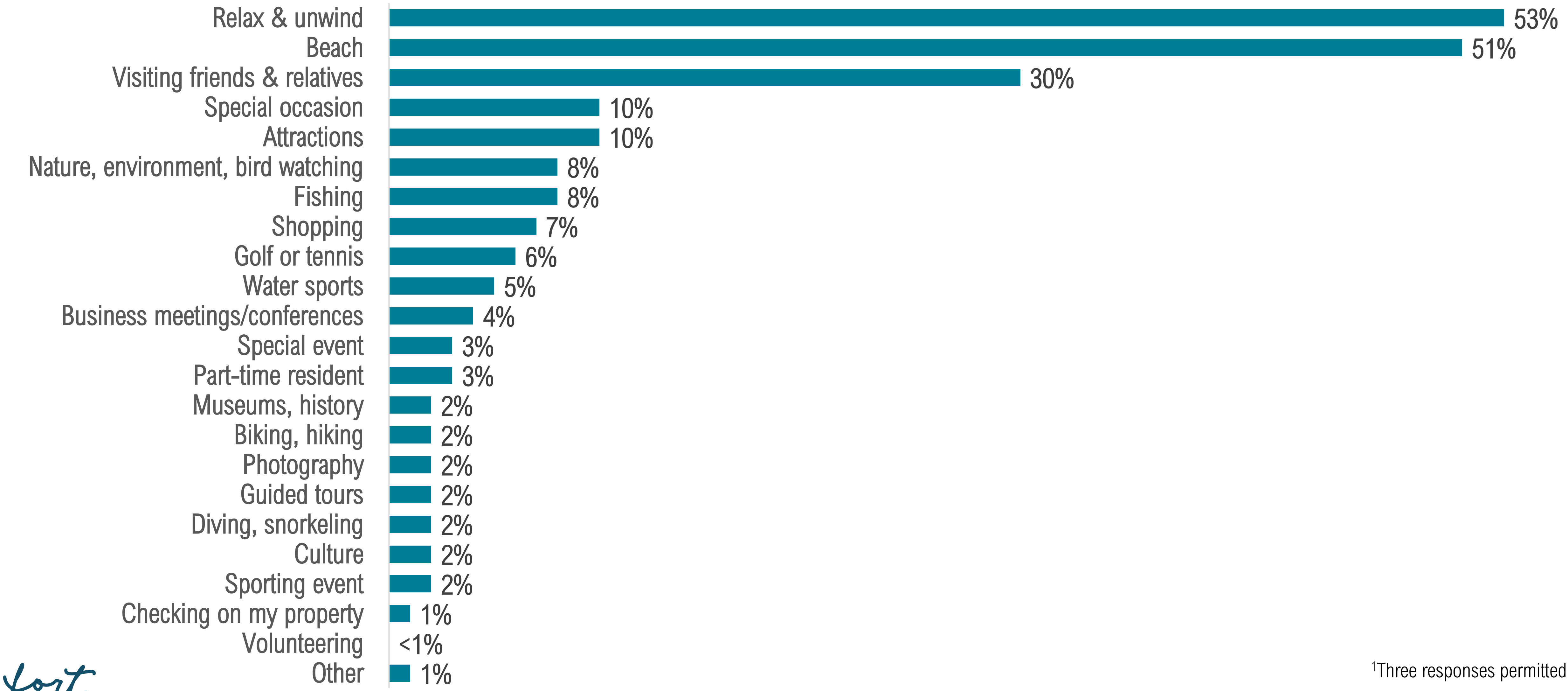
TRIP INFLUENCERS[1]

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



Relax & unwind	53%
Beach	51%
Visiting friends & relatives	30%
Special occasion	10%
Attractions	10%
Nature, environment, bird watching	8%
Fishing	8%
Shopping	7%
Golf or tennis	6%
Water sports	5%
Business meetings/conferences	4%
Special event	3%
Part-time resident	3%
Museums, history	2%
Biking, hiking	2%
Photography	2%
Guided tours	2%
Diving, snorkeling	2%
Culture	2%
Sporting event	2%
Checking on my property	1%
Volunteering	<1%
Other	1%

[1] Three responses permitted.

Pre-Visit
Apr - Jun 2025

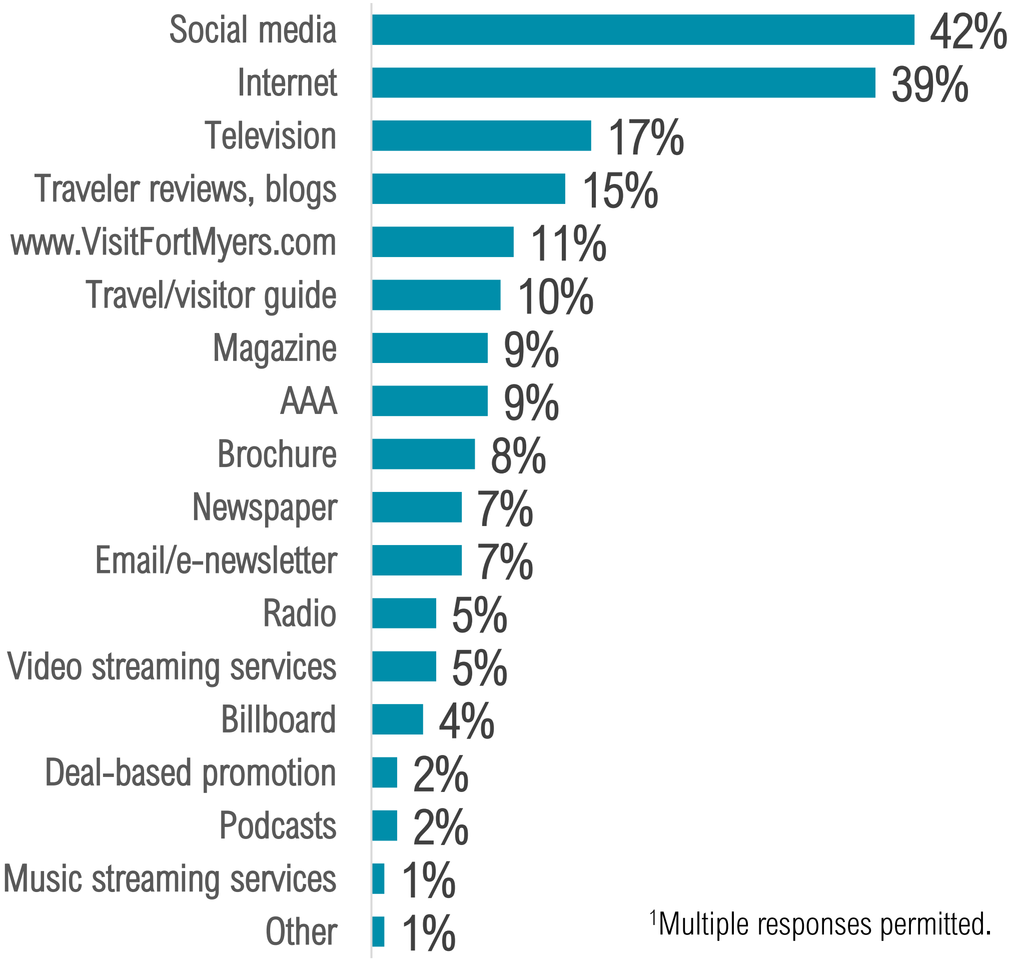
PROMOTIONS RECALL[1]

32% 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: 32% of visitors who recalled promotions

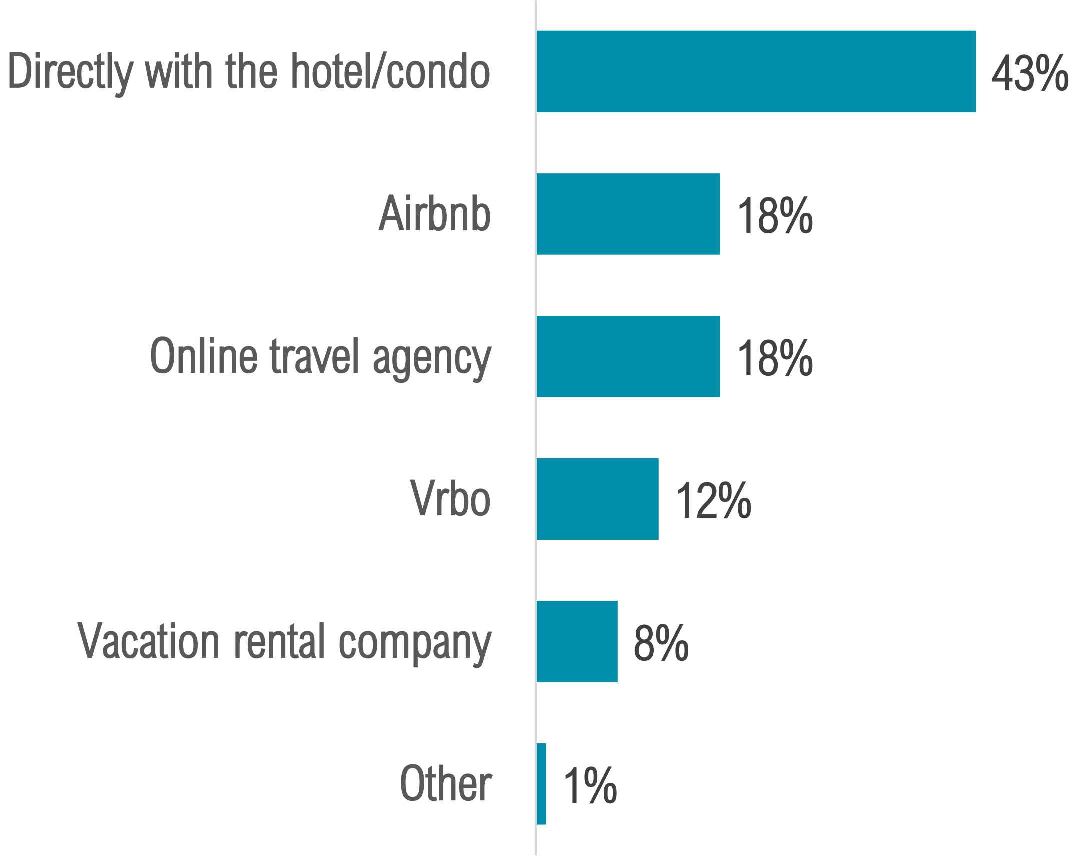
Source of Promotion



[1] Multiple responses permitted.

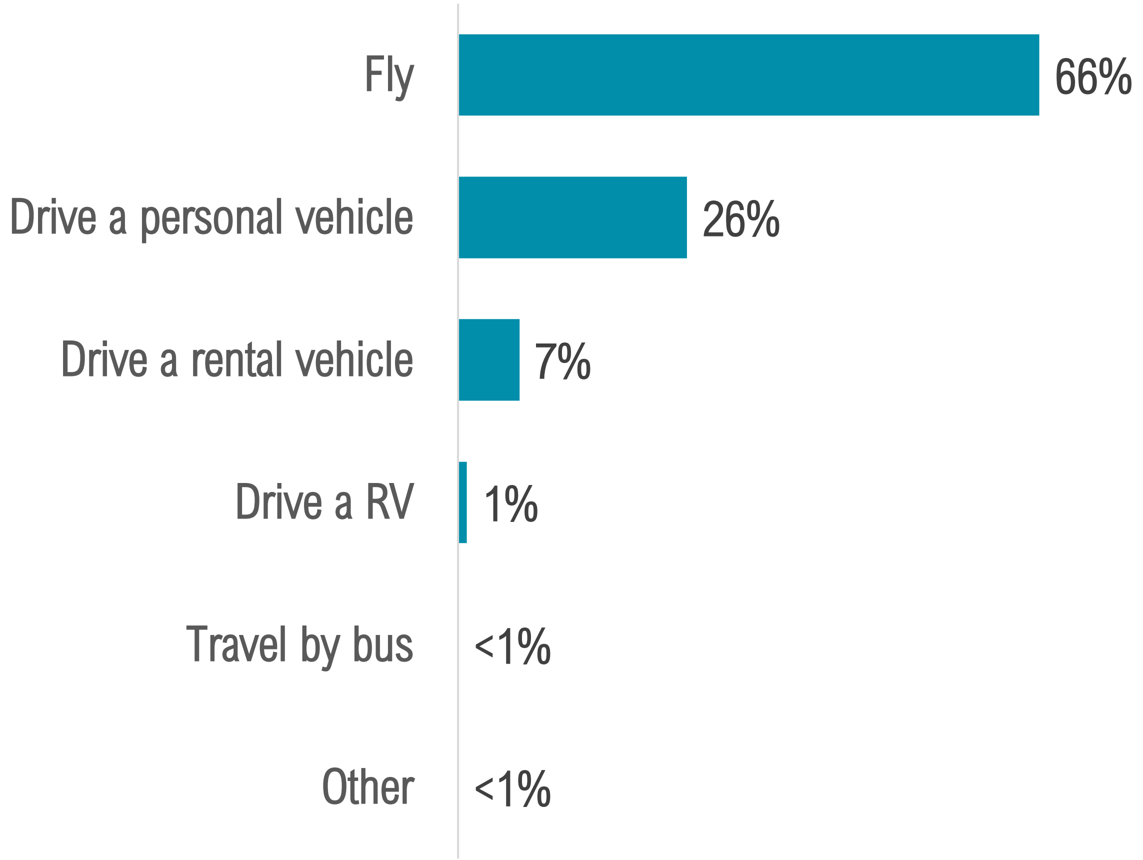
BOOKING

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



TRANSPORTATION

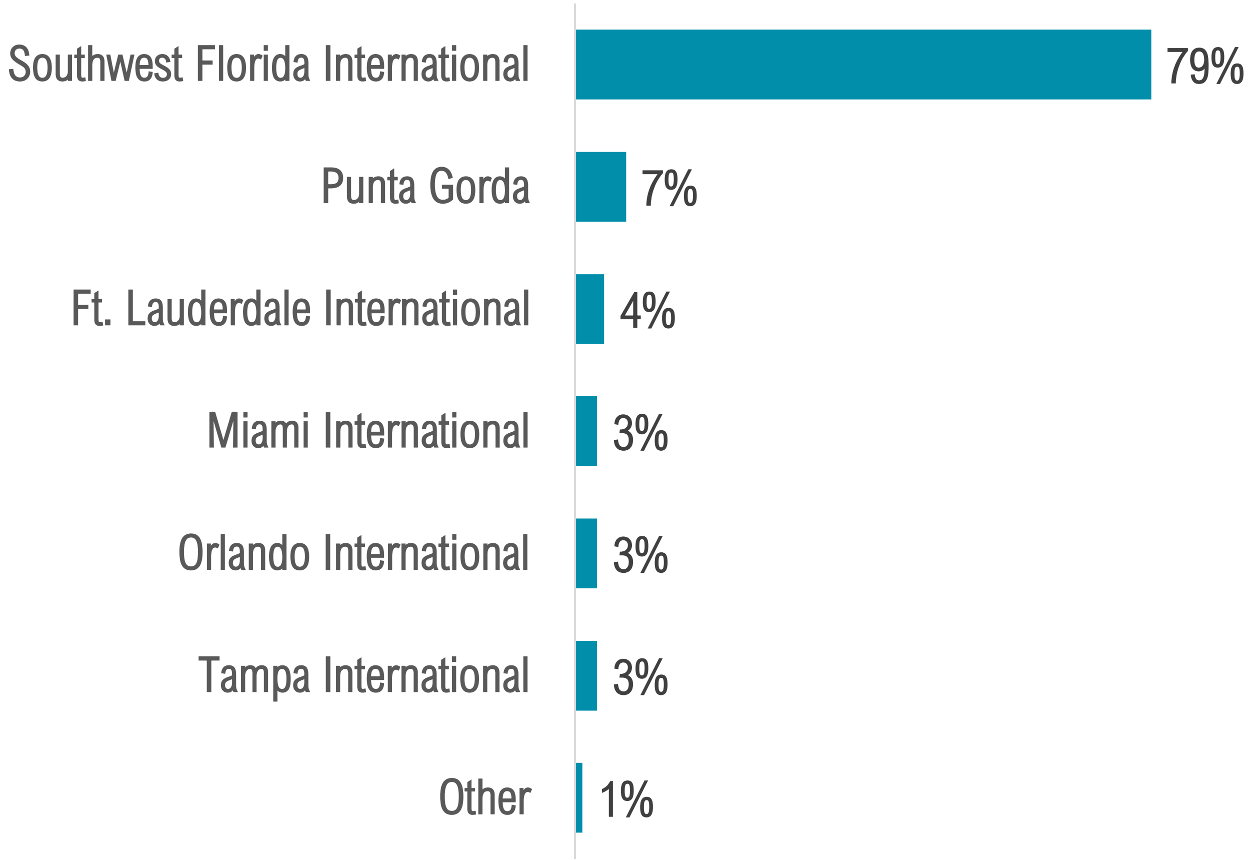
2 in 3 visitors **flew** to the Fort Myers area.



AIRPORT

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

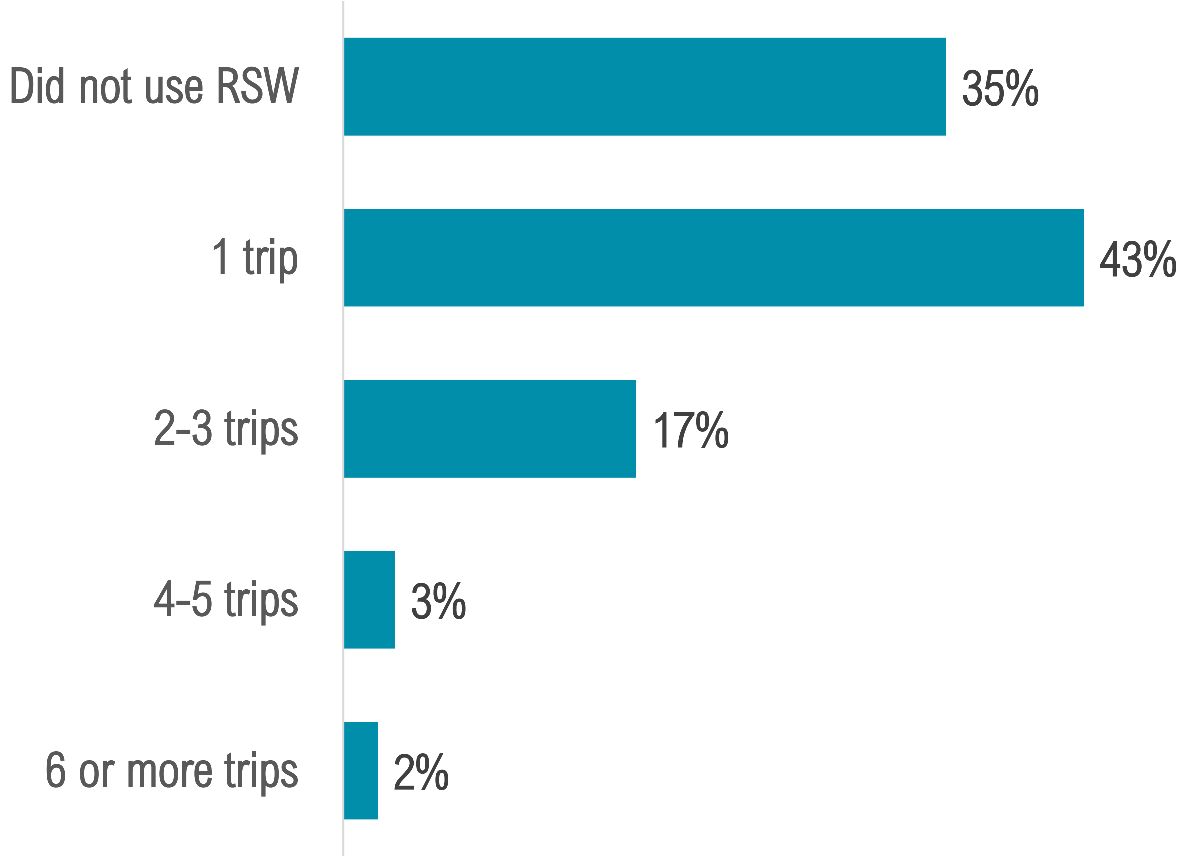
BASE: 66% of visitors who flew



Pre-Visit
Apr - Jun 2025

USE OF RSW IN THE PAST YEAR

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



VISITOR JOURNEY: TRAVEL PARTY PROFILE

Pre-Visit

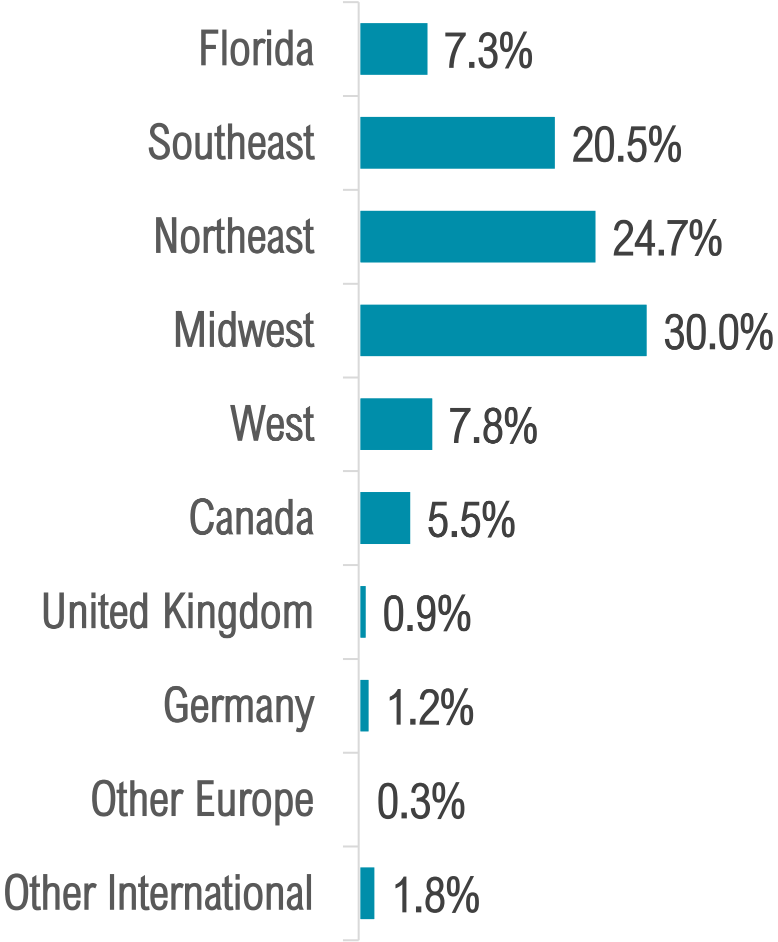
Travel Party Profile

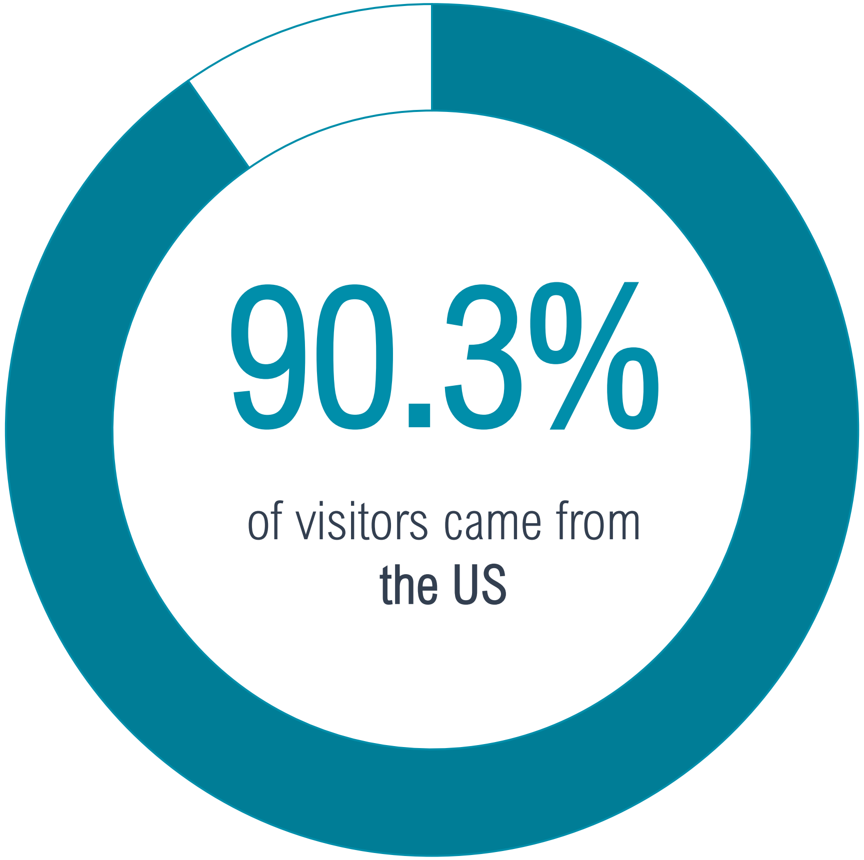
Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

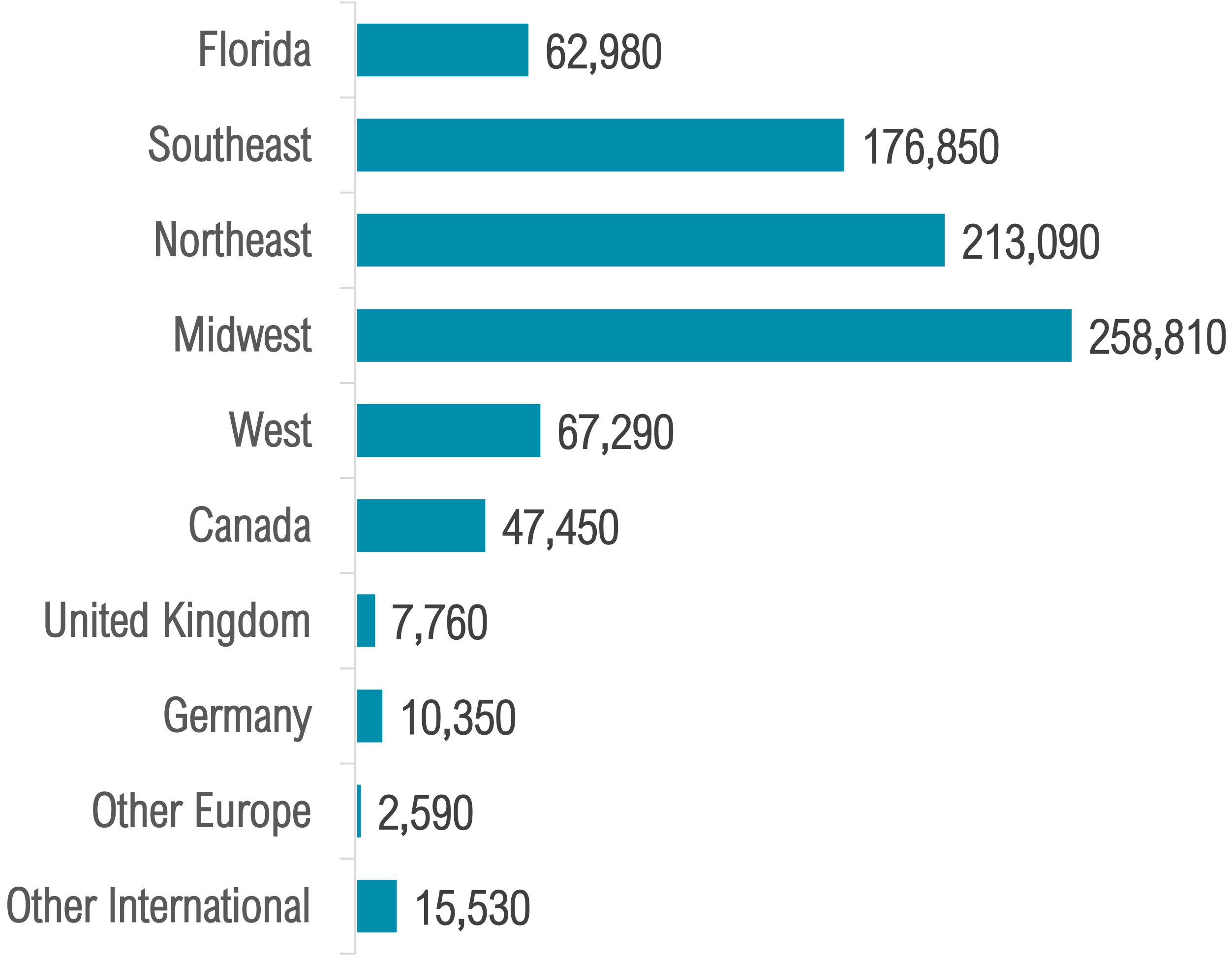
ORIGIN[1]





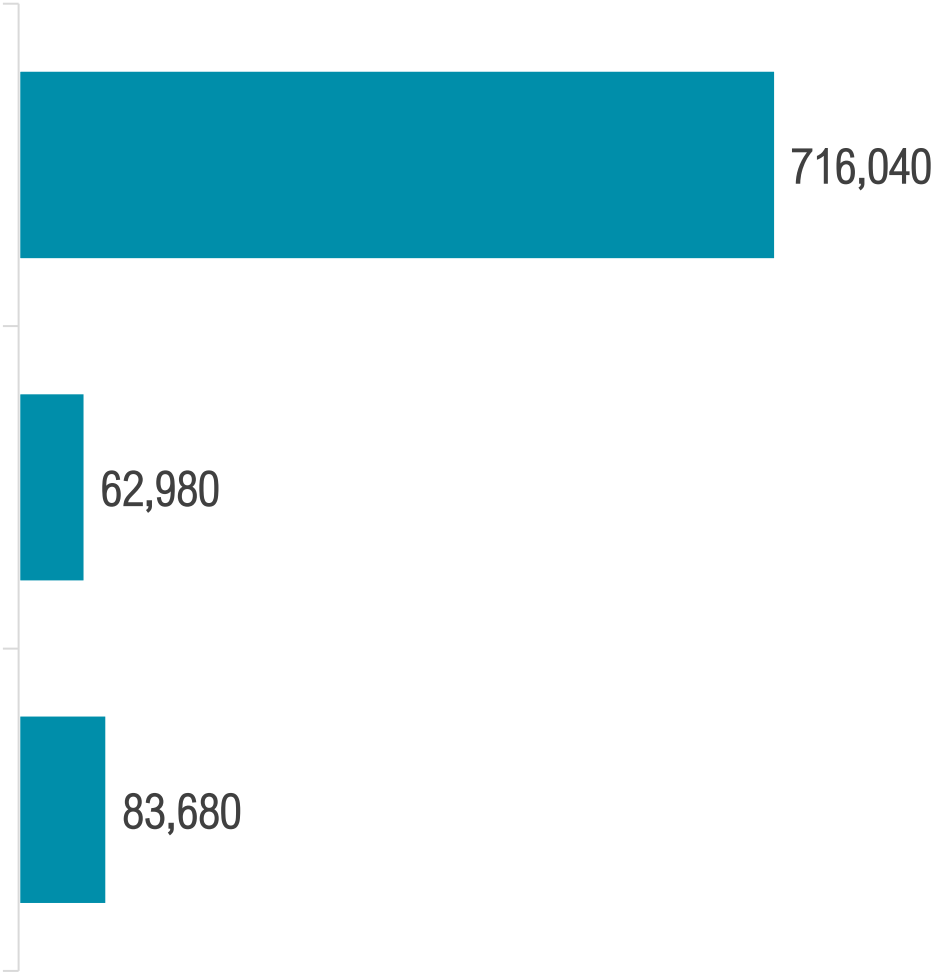
[1] Includes visitors who stayed in paid accommodations, VFRs, and day trippers. Based on data from the Visitor Tracking Study.

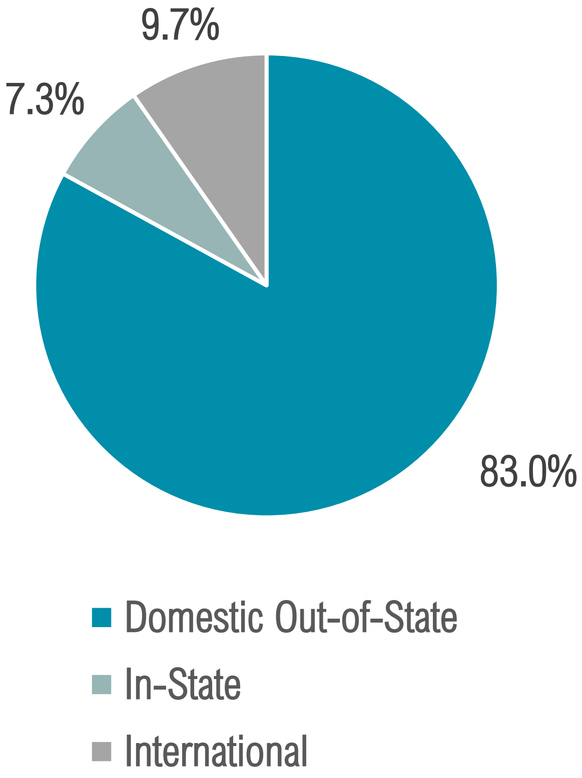
NUMBER OF VISITORS BY ORIGIN[1]



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

NUMBER OF VISITORS BY ORIGIN





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

ORIGIN MARKETS[1]

Market [2]	Percentage of Visitors
New York	7%
Chicago	5%
Philadelphia	4%
Atlanta	4%
Minneapolis-Saint Paul	4%
Boston	3%
Detroit	3%
Washington, DC-Hagerstown	3%
Dallas-Fort Worth	2%
Cincinnati	2%
Denver	2%
Cleveland-Akron	2%
Indianapolis	2%
Nashville	2%
Houston	2%
Charlotte	2%

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

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

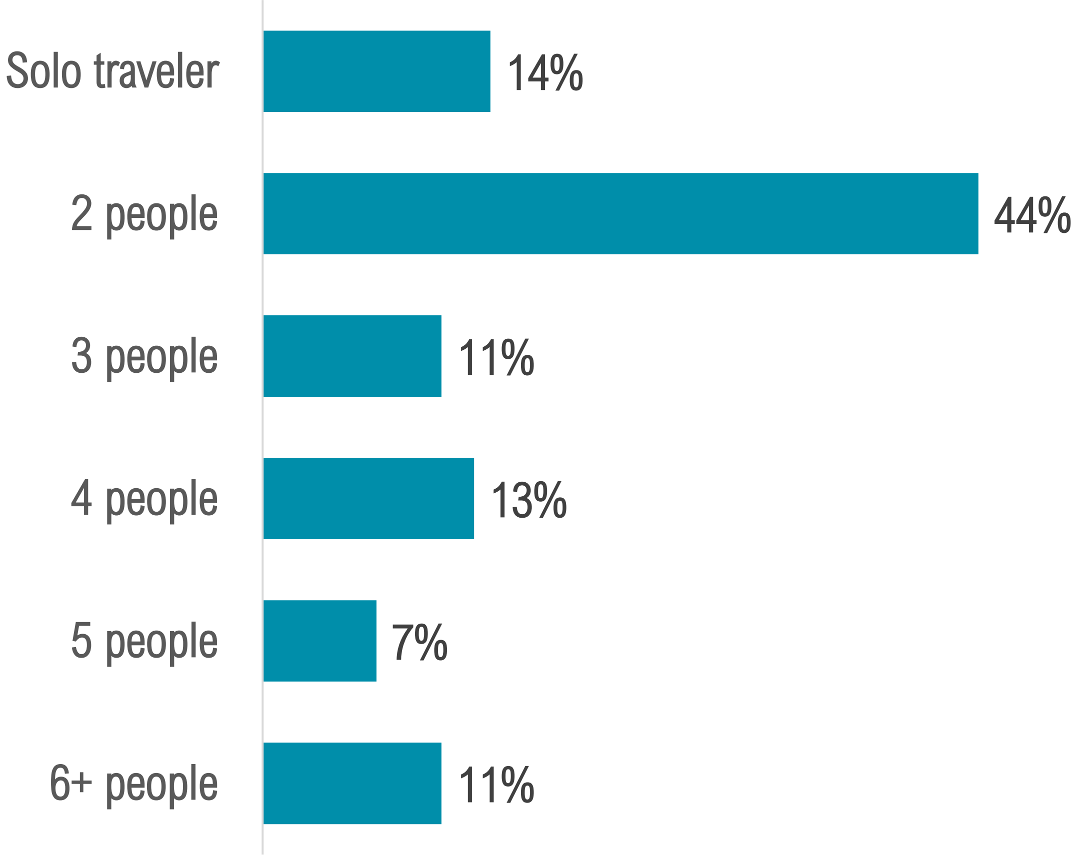
TRAVEL PARTY SIZE AND COMPOSITION

Travel Party Size

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

Travel with Children

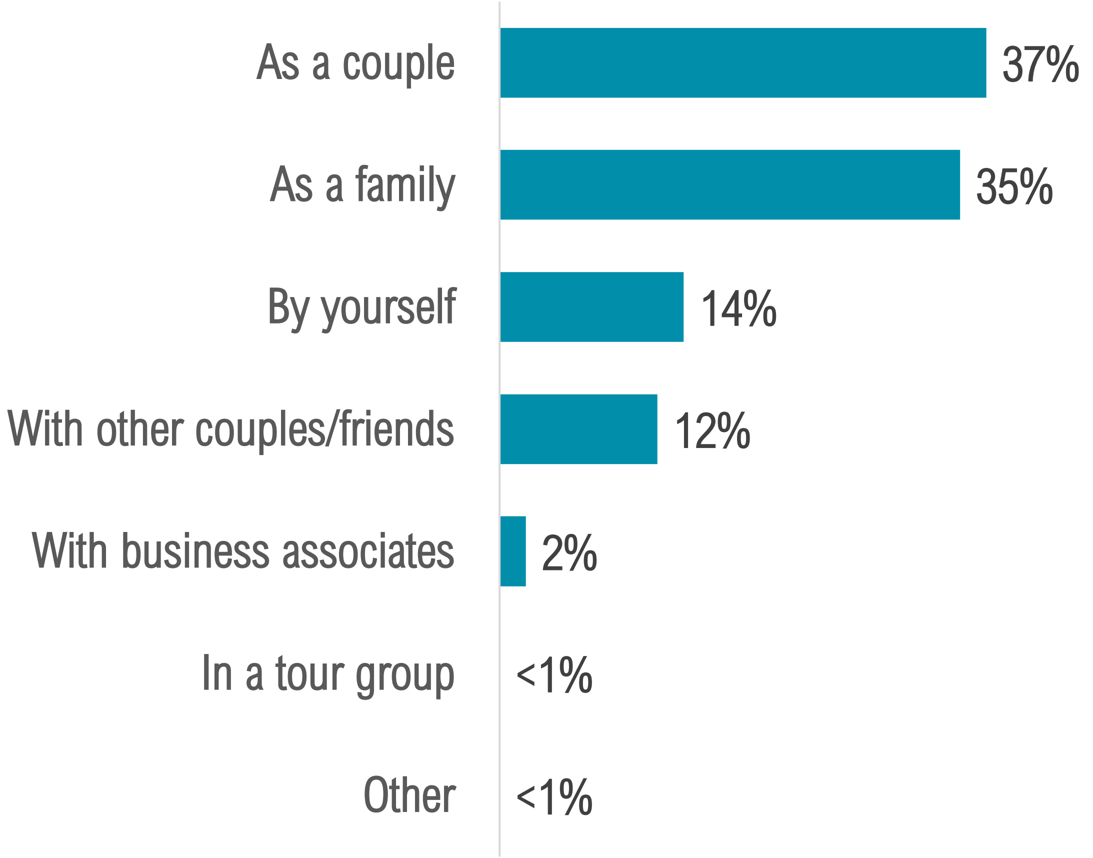
26% of visitors **traveled with children** under the age of 18.



[1] Sources: Occupancy Study and Visitor Tracking Study

TRAVEL PARTY TYPE

Over 7 in 10 visitors traveled either as a **family** or as a **couple**, while **14%** of visitors traveled **alone**.



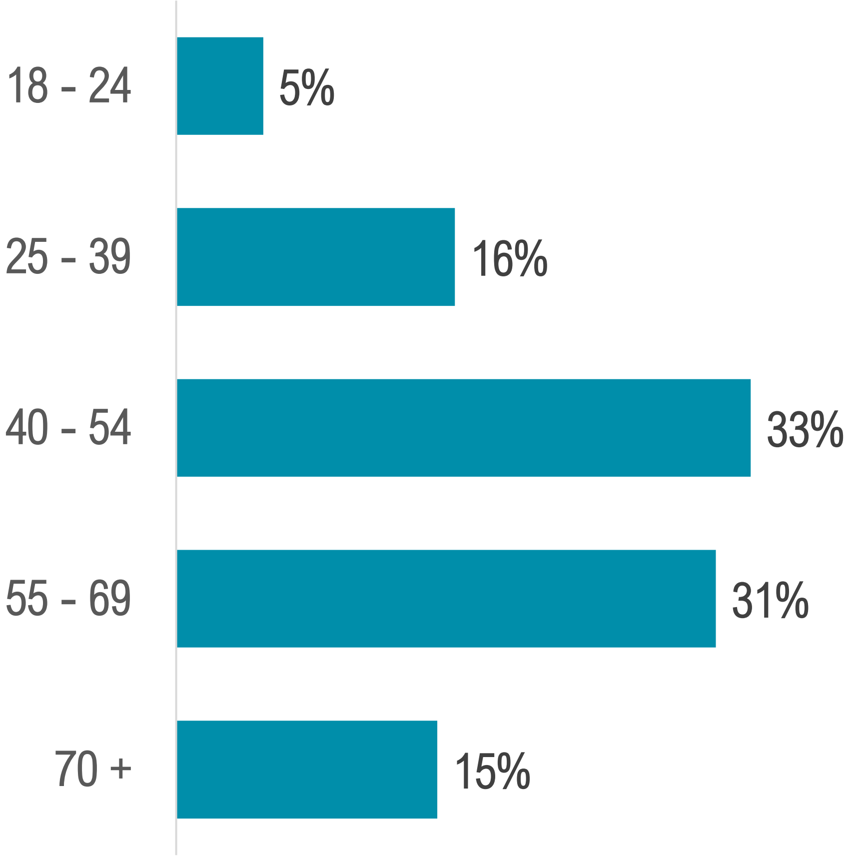
AGE

Average Age

The average age of Apr – Jun visitors was 52 years old.

Median Age

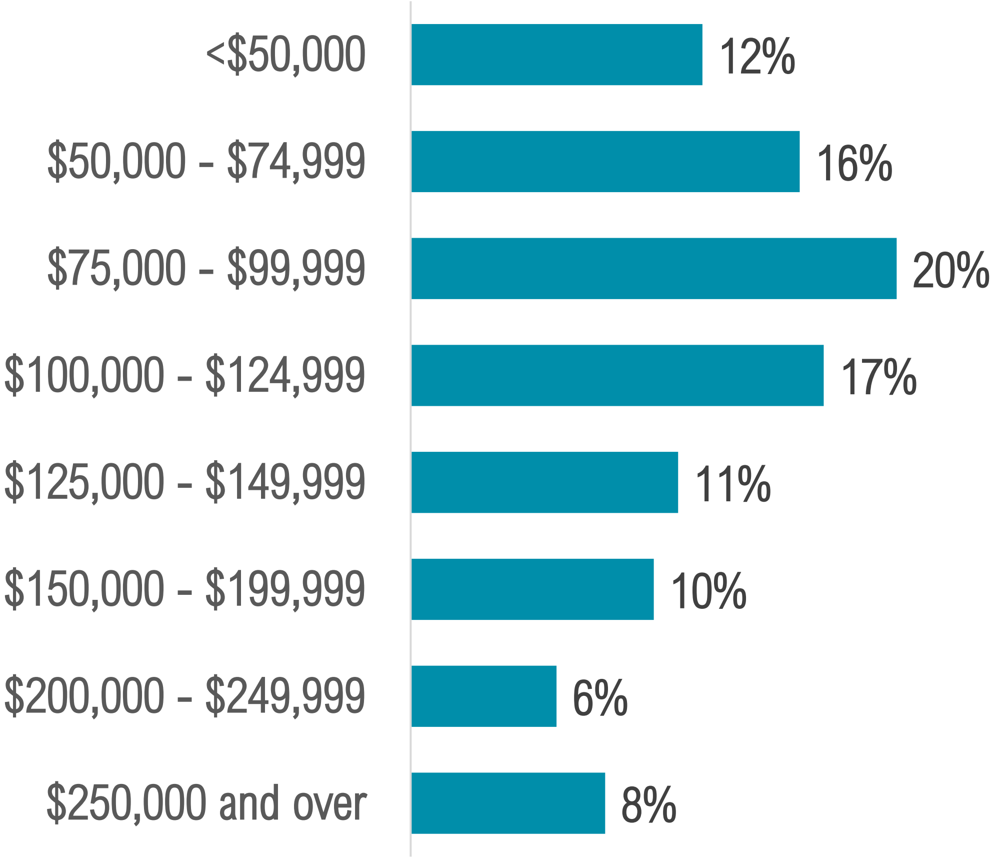
The median age of Apr – Jun visitors was 53 years old.



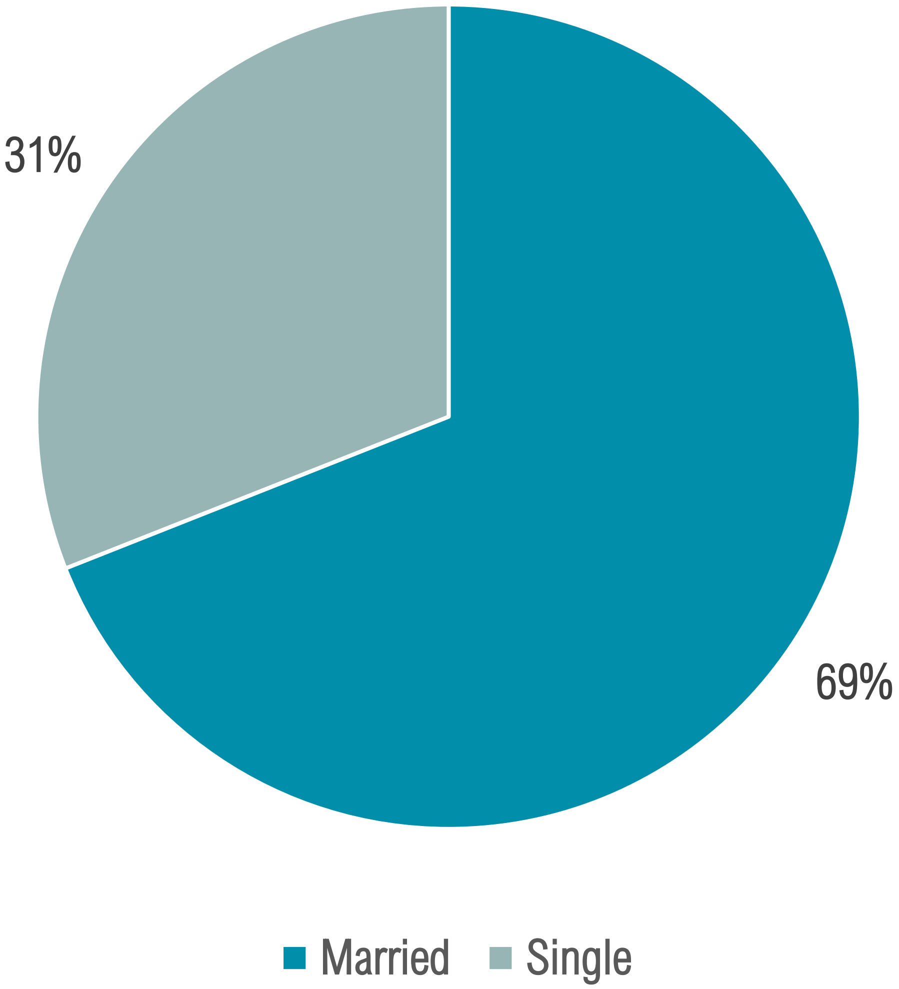
HOUSEHOLD INCOME

Median Household Income
Apr – Jun visitors had a median household income of **$102,900.**

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



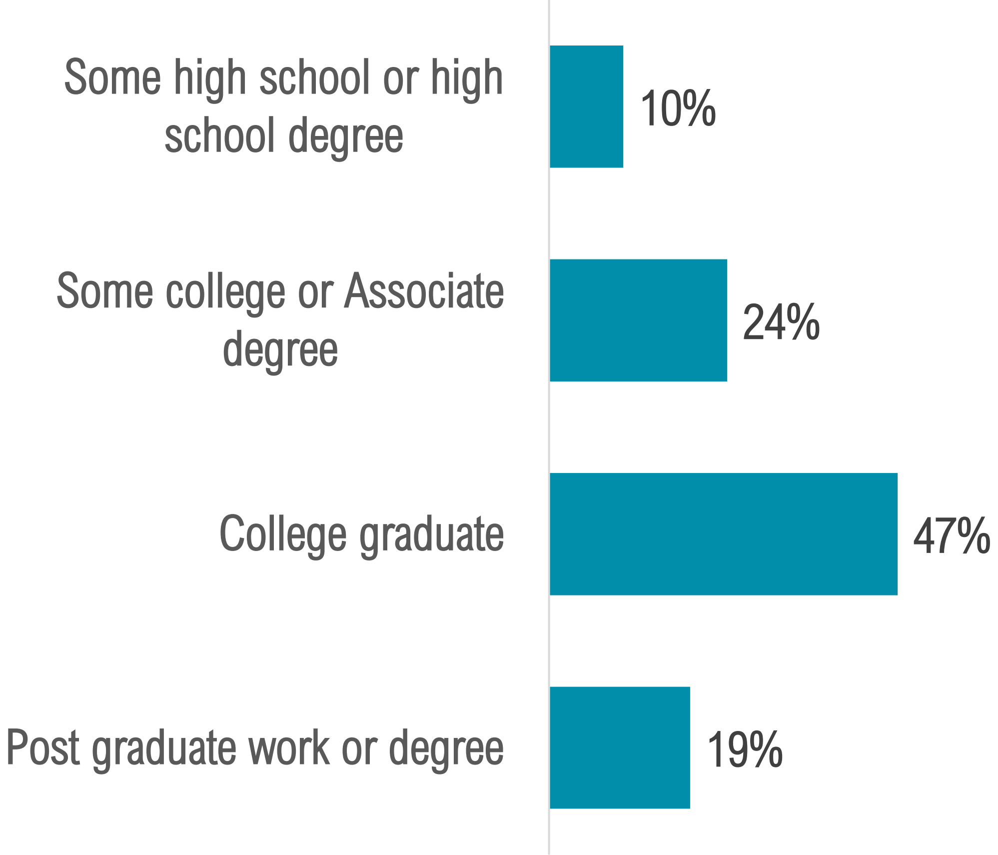
MARITAL STATUS



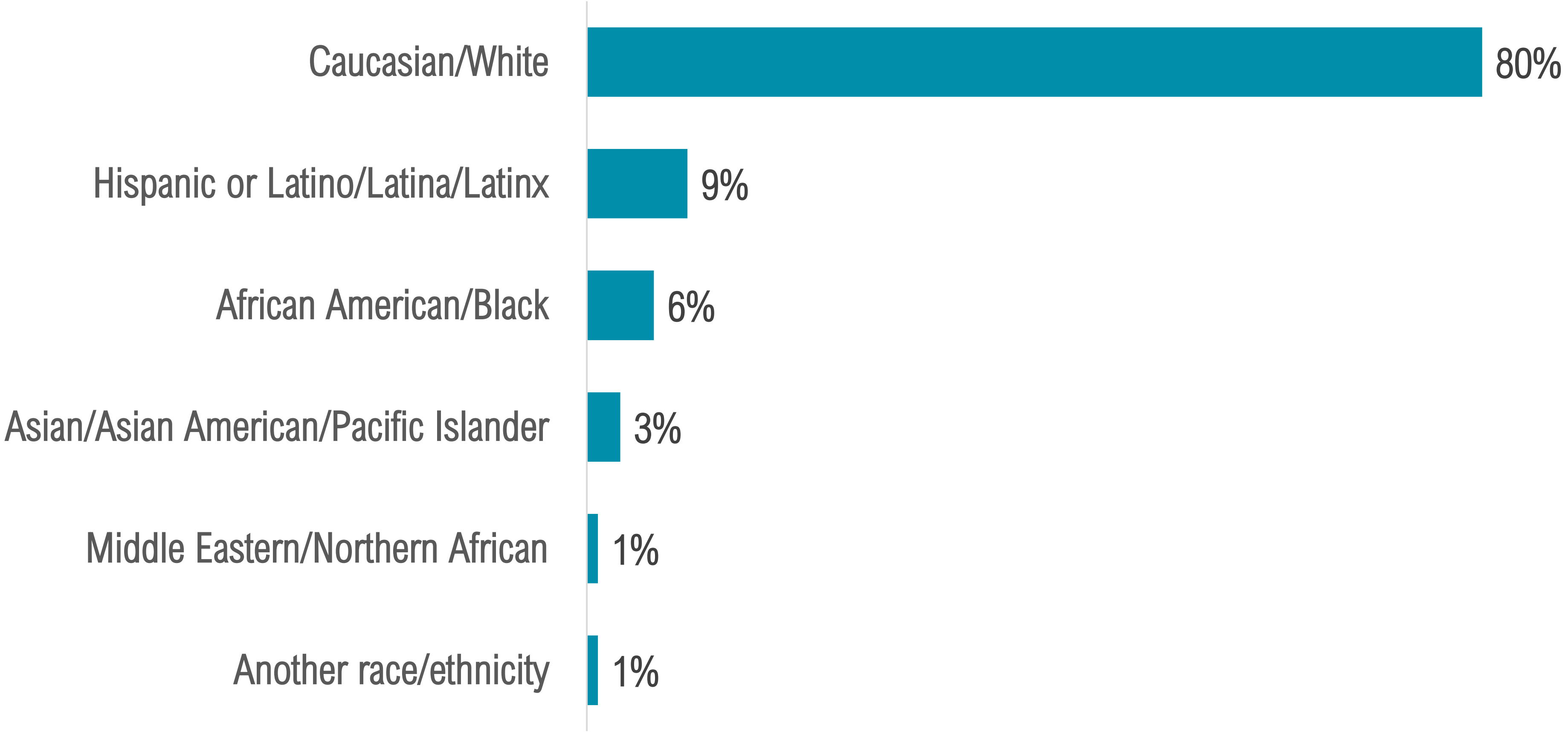
EDUCATION

Education Level

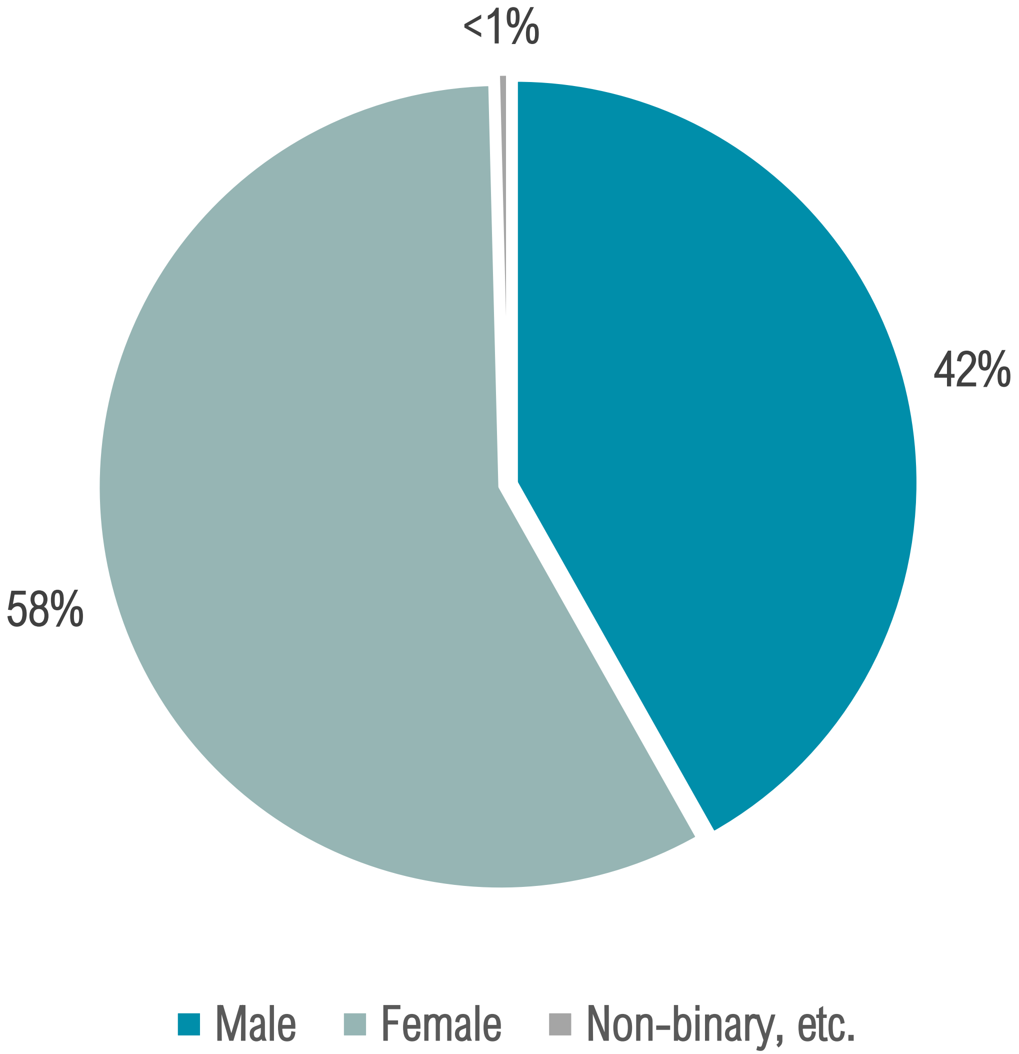
2 in 3 Apr – Jun visitors had achieved a bachelor's degree or higher.



RACE/ETHNICITY



GENDER[1]



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[1] Gender of person interviewed.

VISITOR JOURNEY: TRIP EXPERIENCE

Pre-Visit

Travel Party Profile

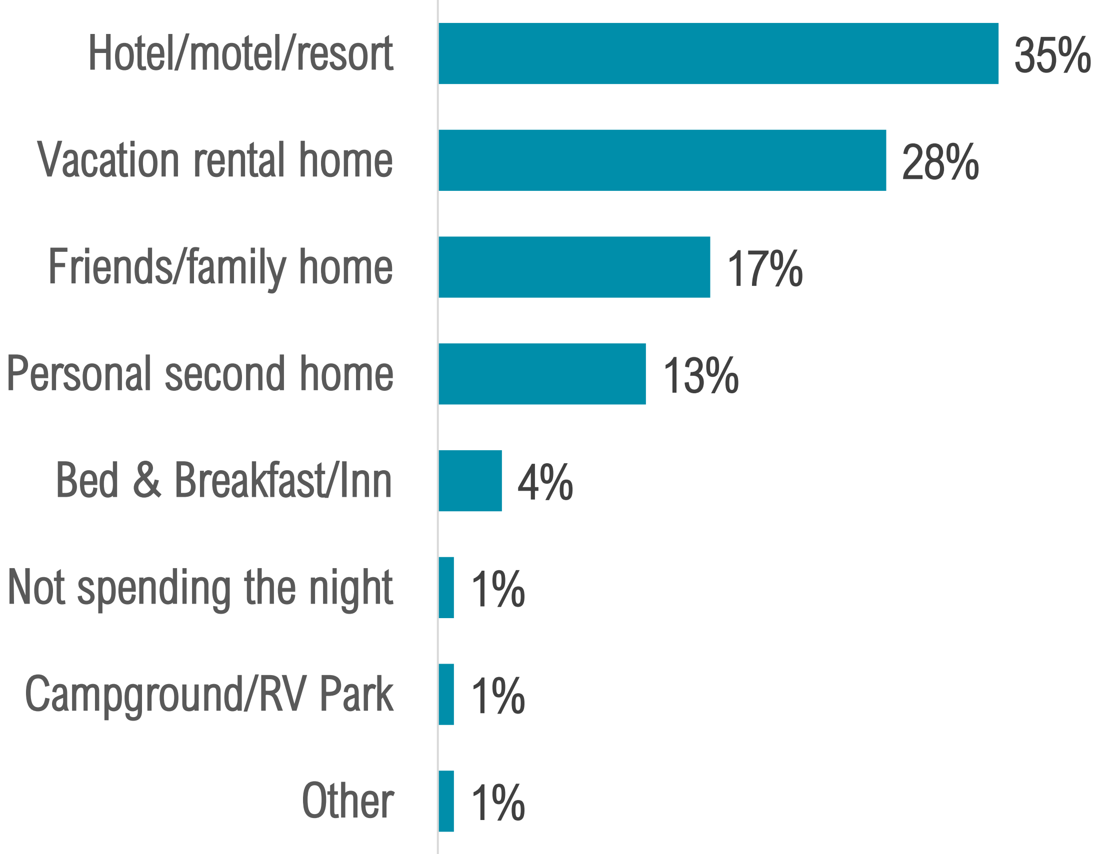
Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

ACCOMMODATIONS

7 in 10 visitors stayed in paid accommodations



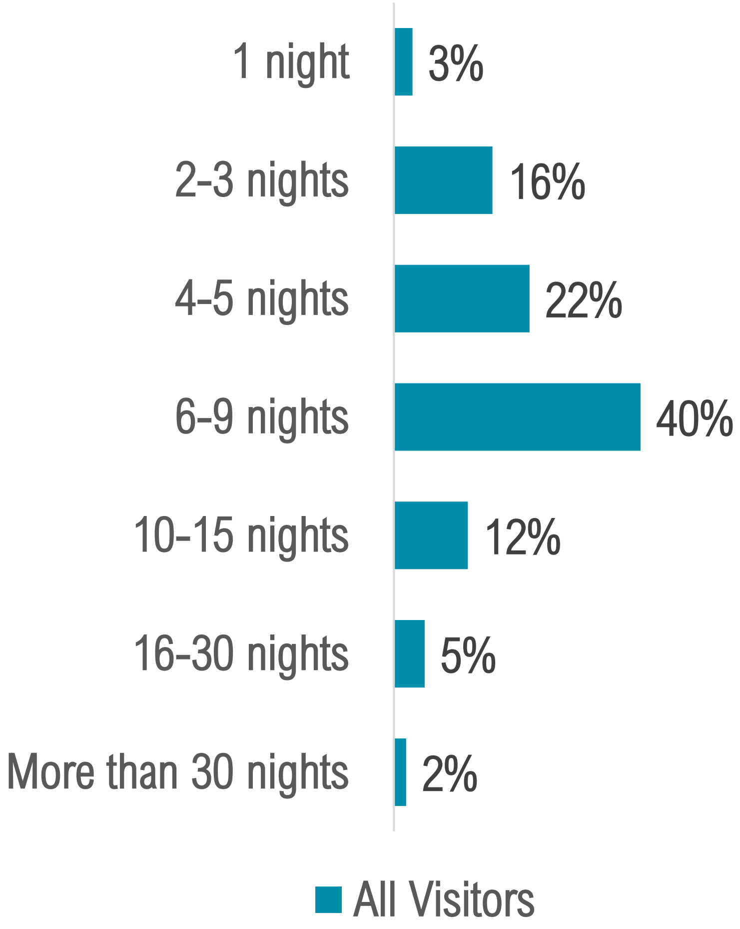
NIGHTS STAYED

All Visitors

Visitors spent an average of **5.7[1] nights** in the Fort Myers area.

Visitors Staying in Paid Accommodations

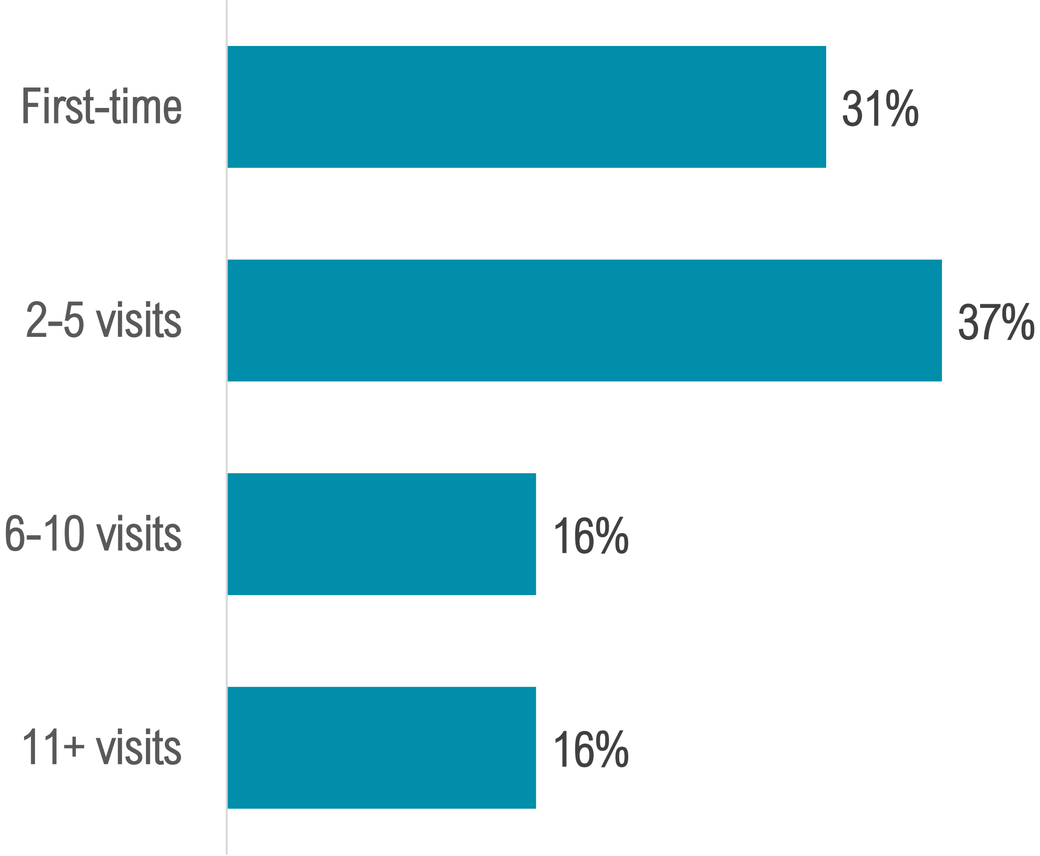
Visitors staying in paid accommodations spent an average of **5.5[2] nights** in the Fort Myers area.



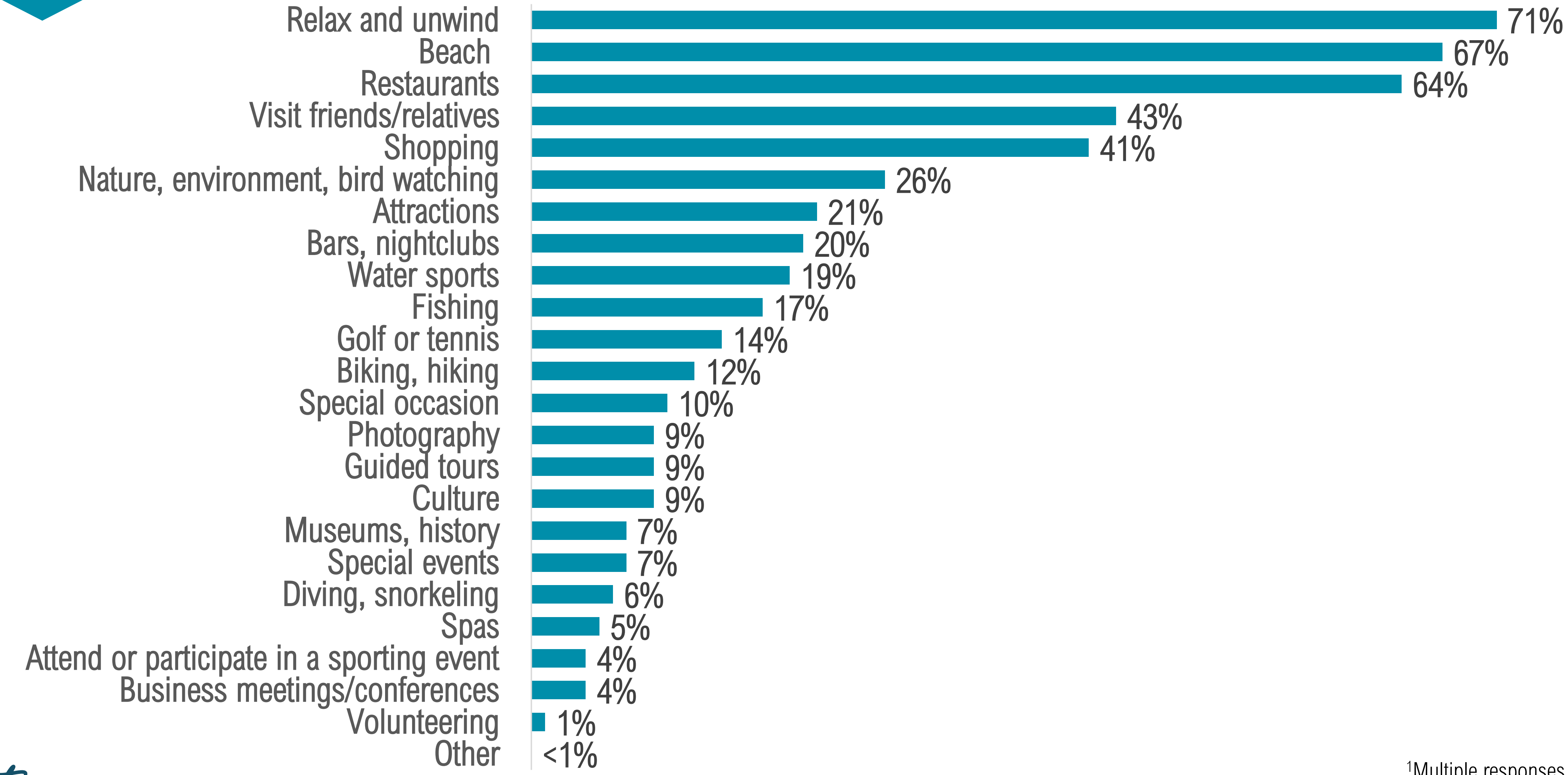
[1] Sources: Occupancy Study and Visitor Tracking Study
[2] Source: Occupancy Study

FIRST TIME AND EXPERIENCED VISITORS

31% of visitors were visiting for the first time, while 16% were highly loyal visitors, having visited more than 10 times.

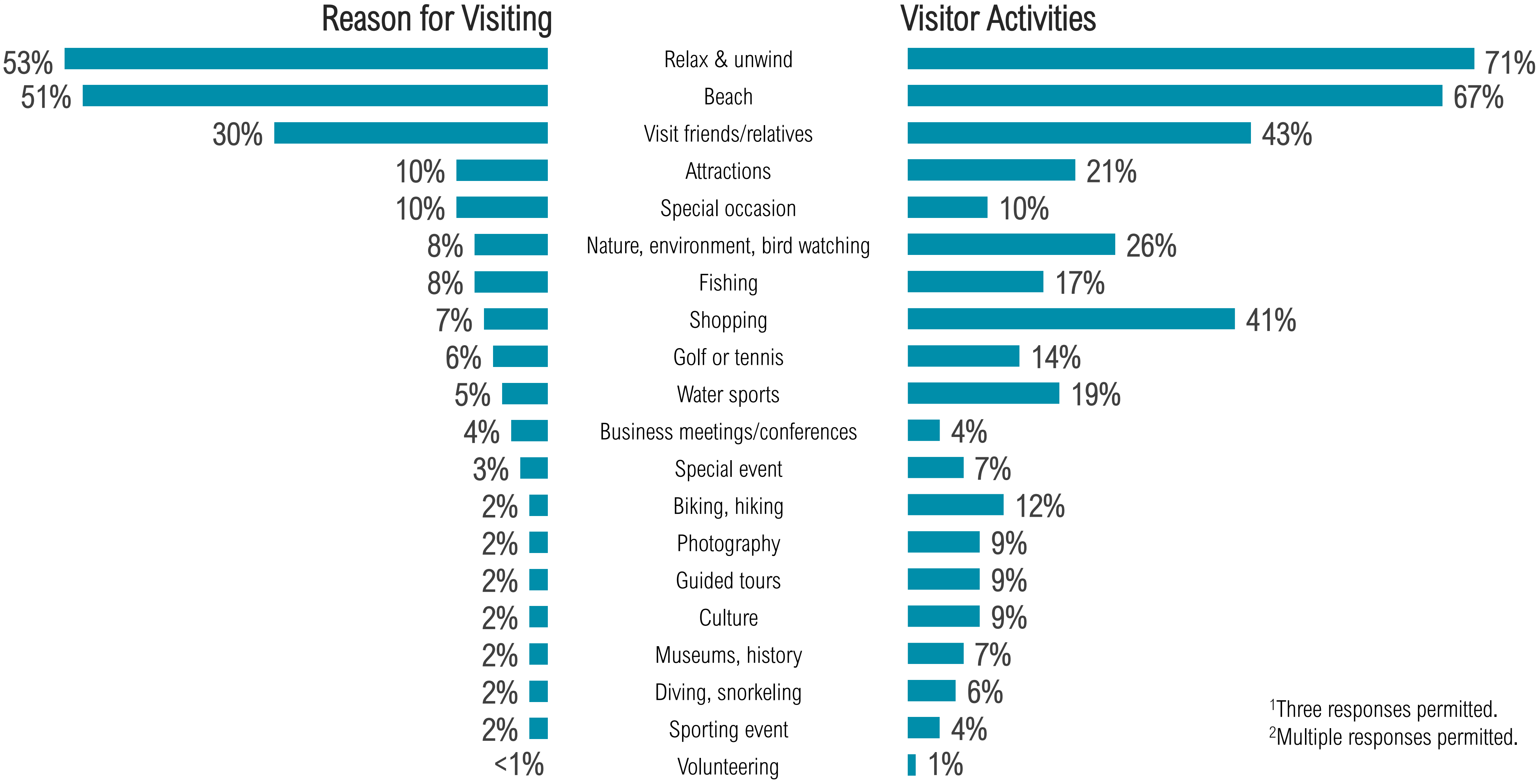


VISITOR ACTIVITIES[1]



[1] Multiple responses permitted.

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

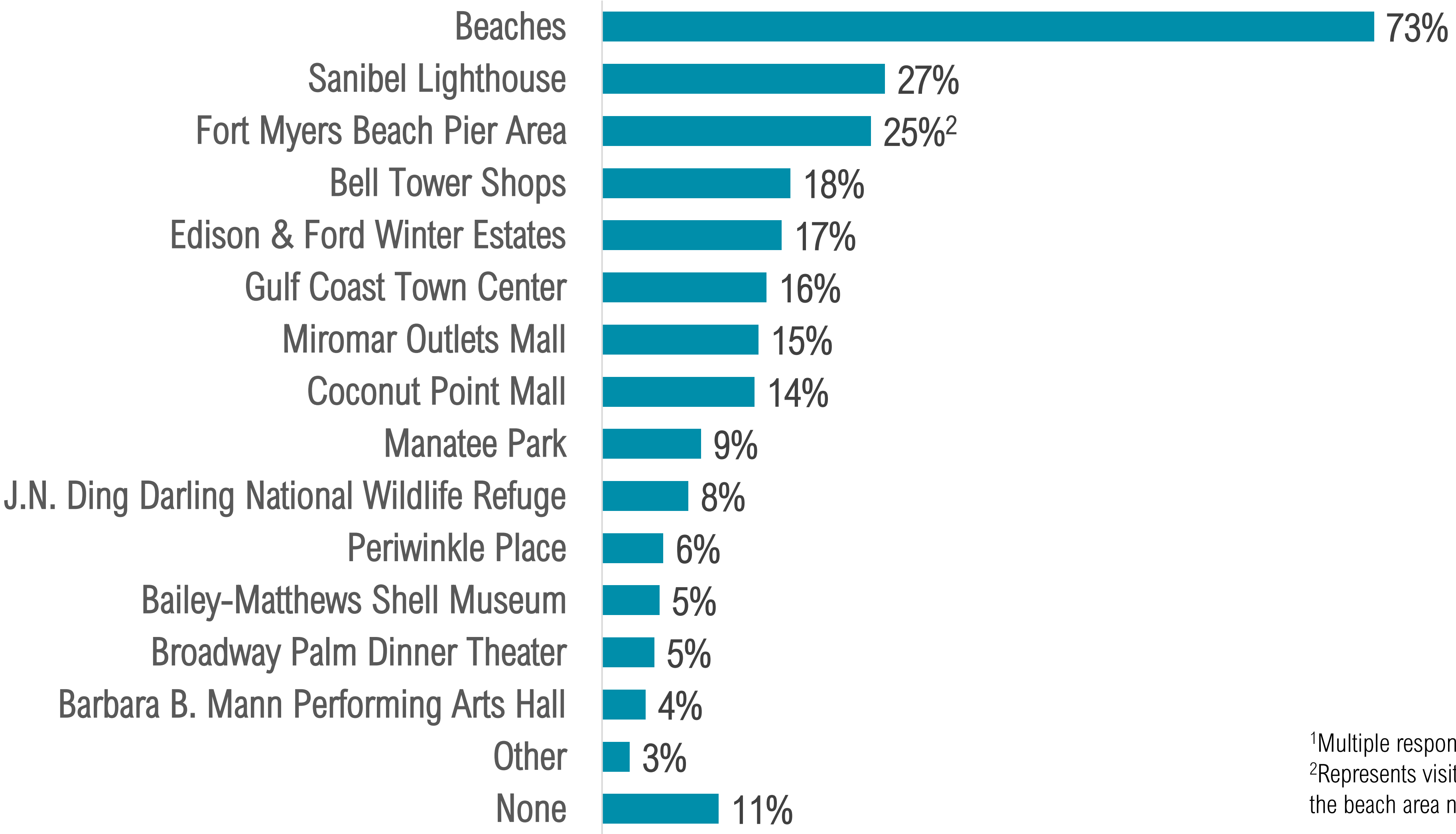


[1] Three responses permitted.

[2] Multiple responses permitted.

Apr - Jun 2025

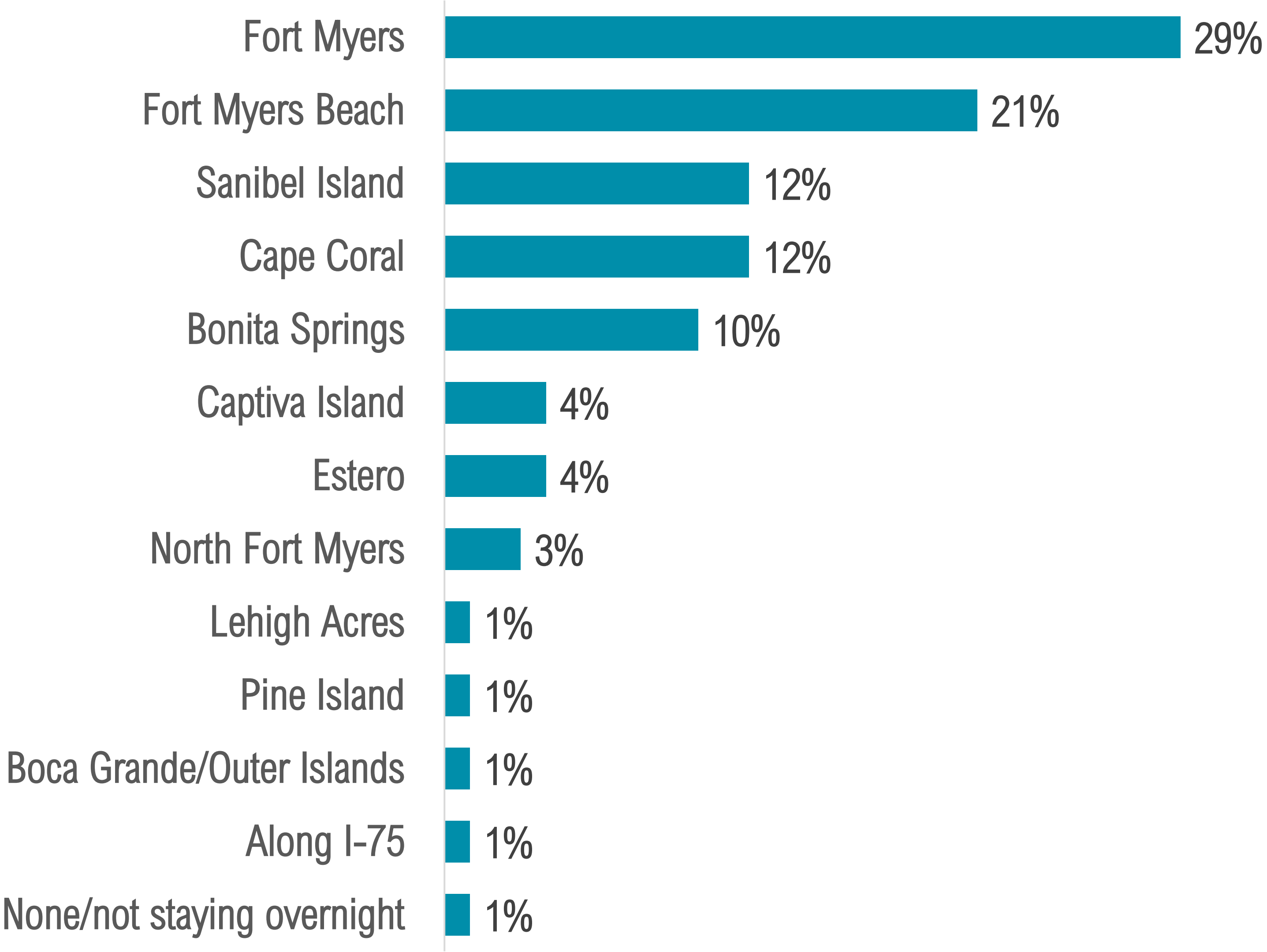
ATTRACTIONS VISITED[1]



[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

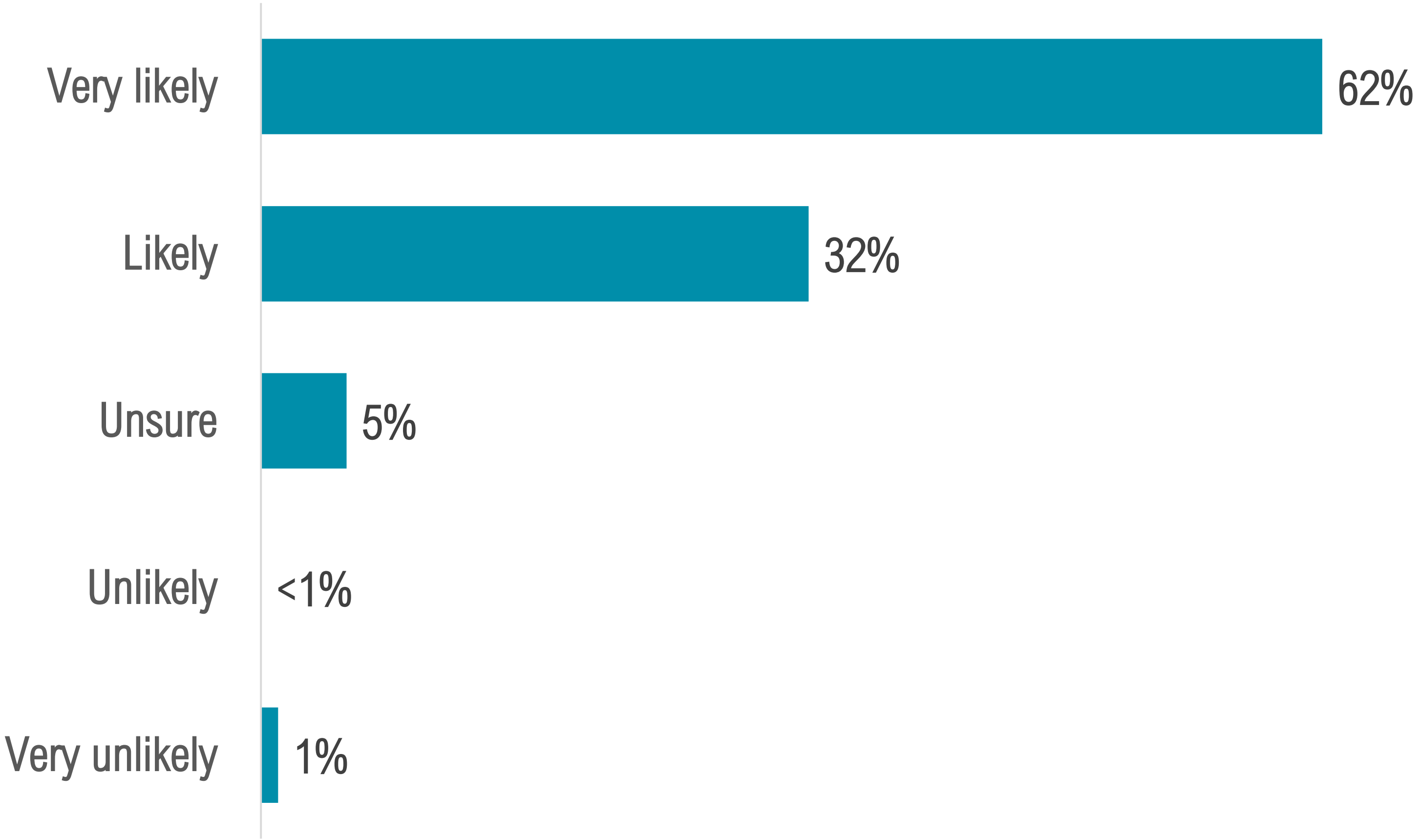
Travel Party Profile

Trip Experience

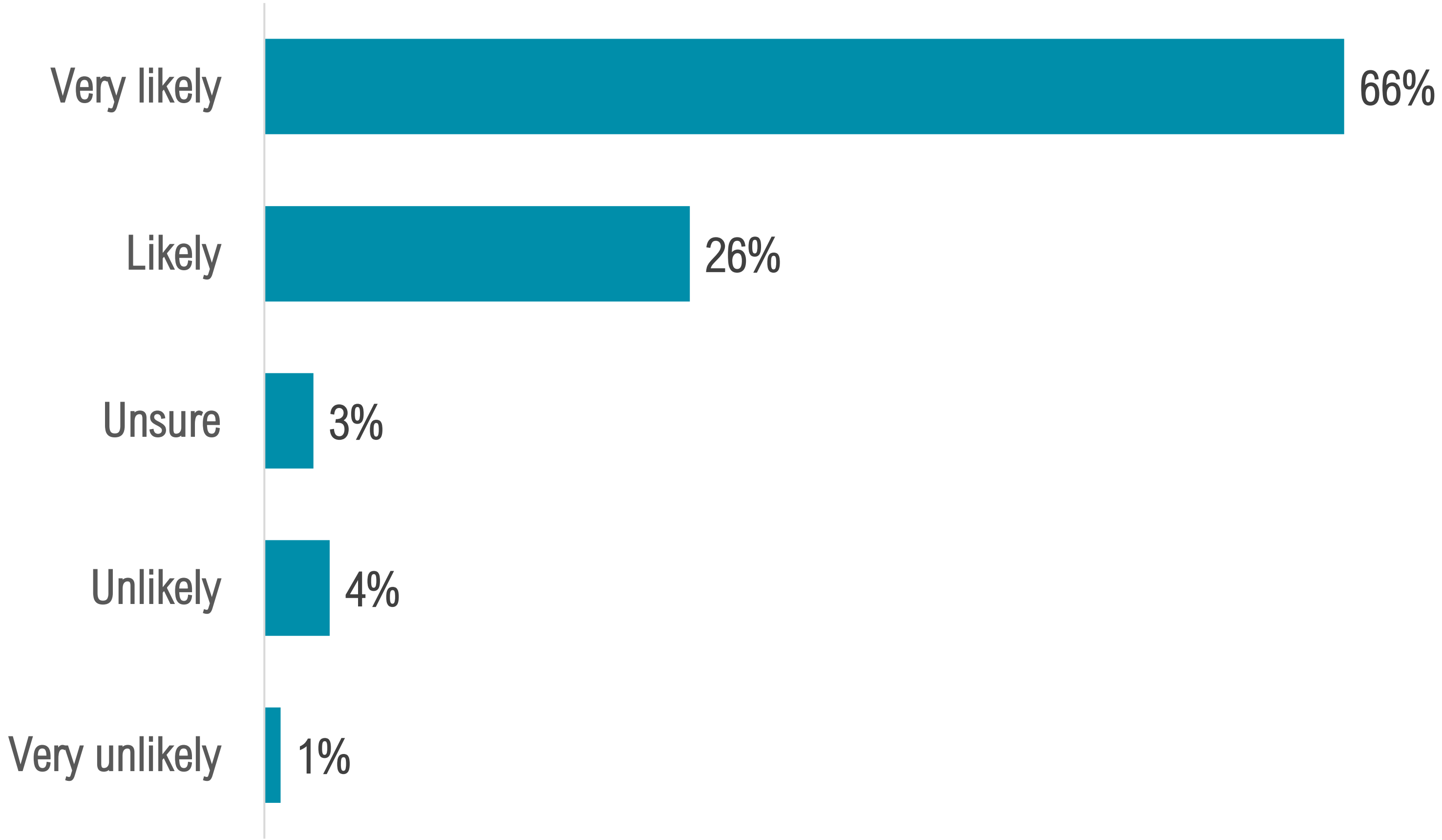
Post-Trip Evaluation

Economic Impact on Destination

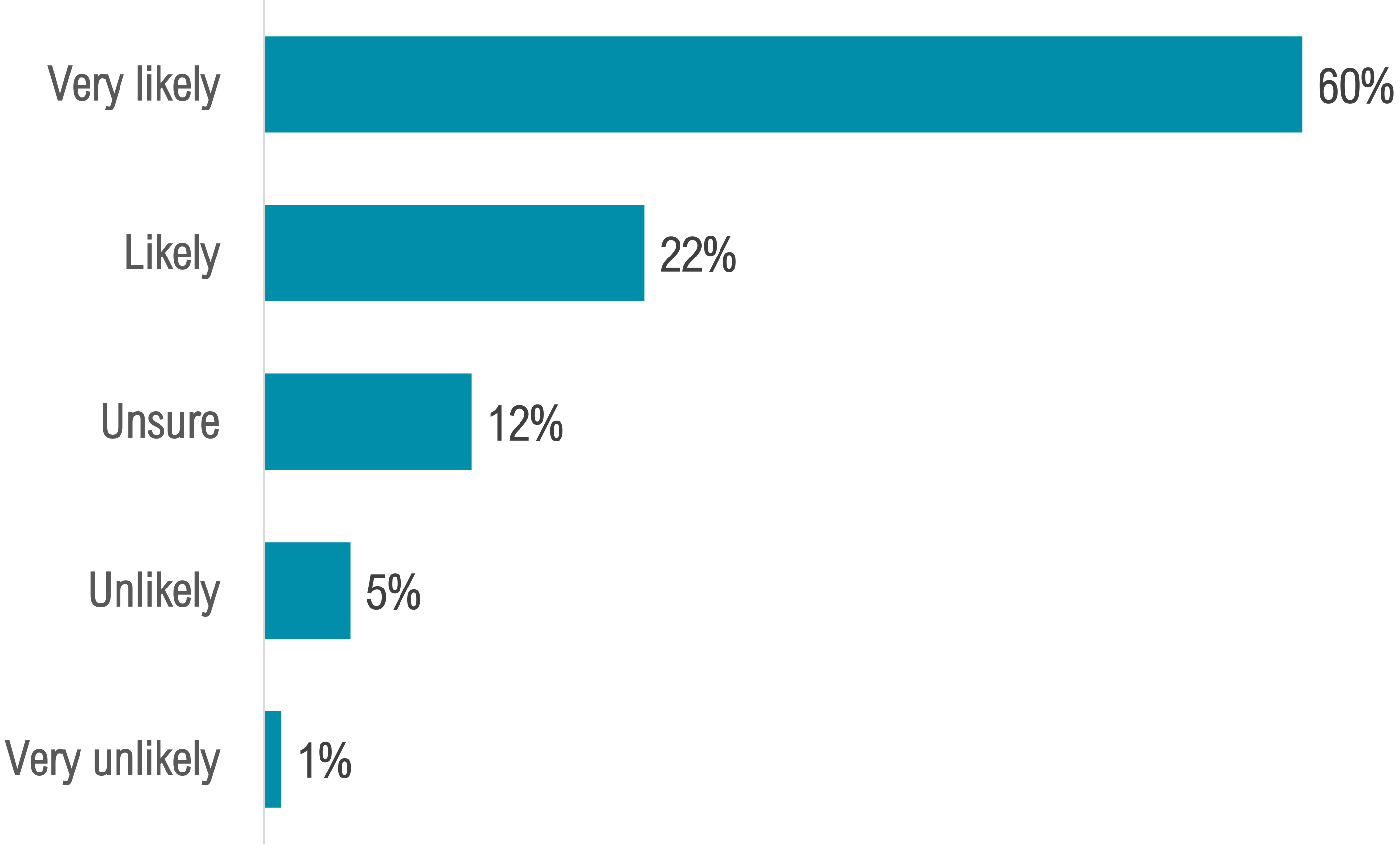
LIKELIHOOD OF RECOMMENDING THE AREA



LIKELIHOOD OF RETURNING TO THE AREA



LIKELIHOOD OF RETURNING NEXT YEAR



REASONS FOR NOT RETURNING[1]

BASE: 5% of visitors surveyed who said they're unlikely or very unlikely to return

[1] Multiple responses permitted. Only asked of respondents who said they were "very unlikely" or "unlikely" to return to the area which represents only 5% of all visitors surveyed.

CROSSTABULATIONS: LIKELIHOOD OF RECOMMENDING[1]

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2024	2025	2024	2025	2024	2025	2024	2025
Very Likely	52%	51%	49%	67%	48%	62%	58%	68%
Likely	37%	35%	45%	30%	45%	32%	39%	29%
Unsure/don't know	9%	12%	5%	3%	6%	5%	2%	3%
Unlikely	2%	1%	1%	<1%	1%	<1%	1%	<1%
Very Unlikely	<1%	1%	<1%	<1%	<1%	1%	<1%	<1%

CROSSTABULATIONS: LIKELIHOOD OF RETURNING[1]

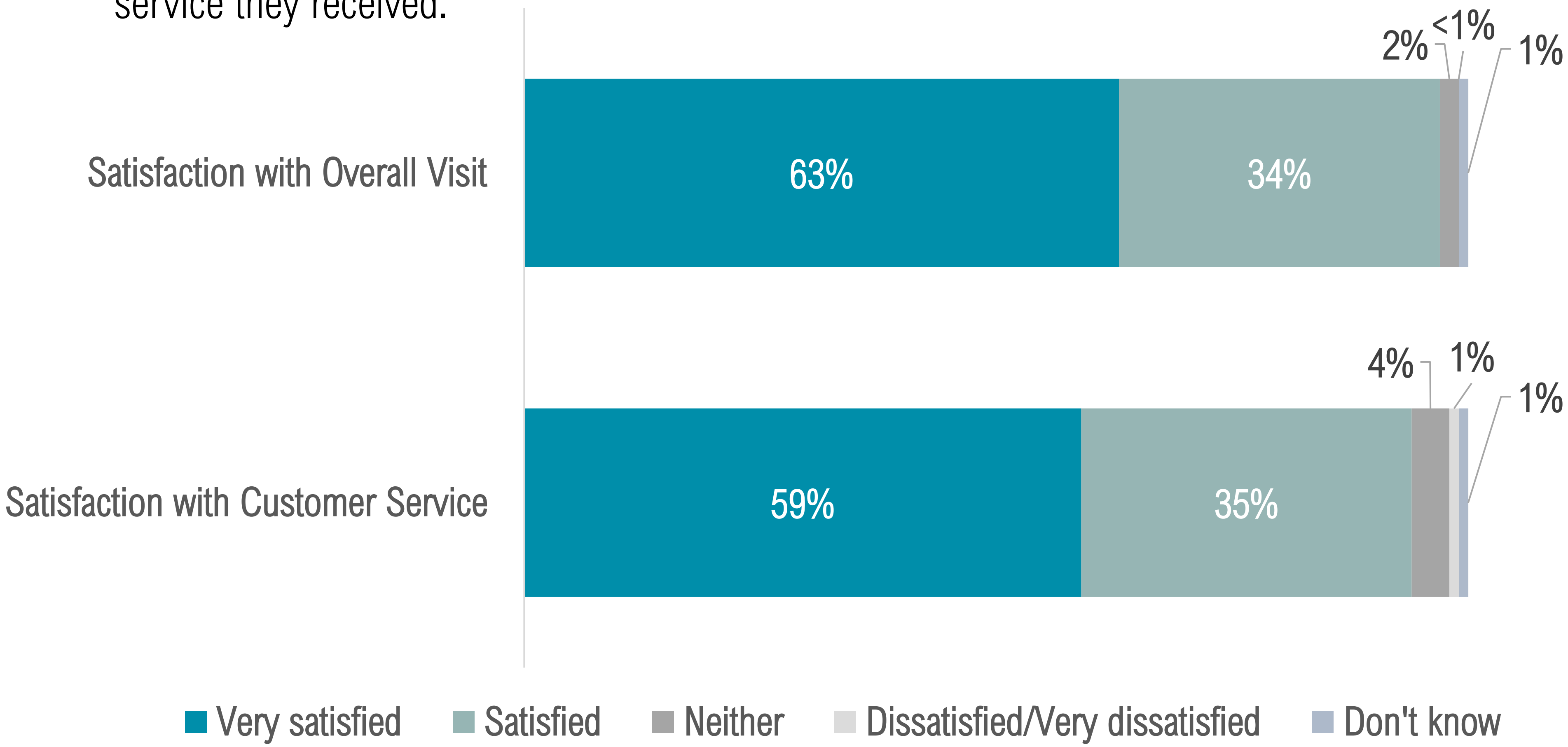
	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2024	2025	2024	2025	2024	2025	2024	2025
Very Likely	53%	49%	54%	74%	52%	66%	64%	69%
Likely	30%	31%	39%	23%	39%	26%	31%	26%
Unsure/don't know	14%	17%	6%	3%	8%	8%	2%	4%
Unlikely	3%	2%	1%	<1%	1%	<1%	2%	1%
Very Unlikely	<1%	1%	<1%	<1%	<1%	<1%	1%	<1%

CROSSTABULATIONS: LIKELIHOOD OF RETURNING NEXT YEAR

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int’l Visitors	
	2024	2025	2024	2025	2024	2025	2024	2025
Very Likely	42%	41%	54%	67%	50%	61%	66%	65%
Likely	26%	23%	29%	23%	30%	23%	19%	27%
Unsure/don’t know	18%	20%	13%	6%	14%	9%	12%	6%
Unlikely	13%	11%	3%	3%	5%	5%	3%	2%
Very Unlikely	1%	5%	1%	1%	1%	2%	<1%	<1%

SATISFACTION

- Compared to 2024, visitors were **more** likely to be **very satisfied** with their overall visit or the customer service they received.



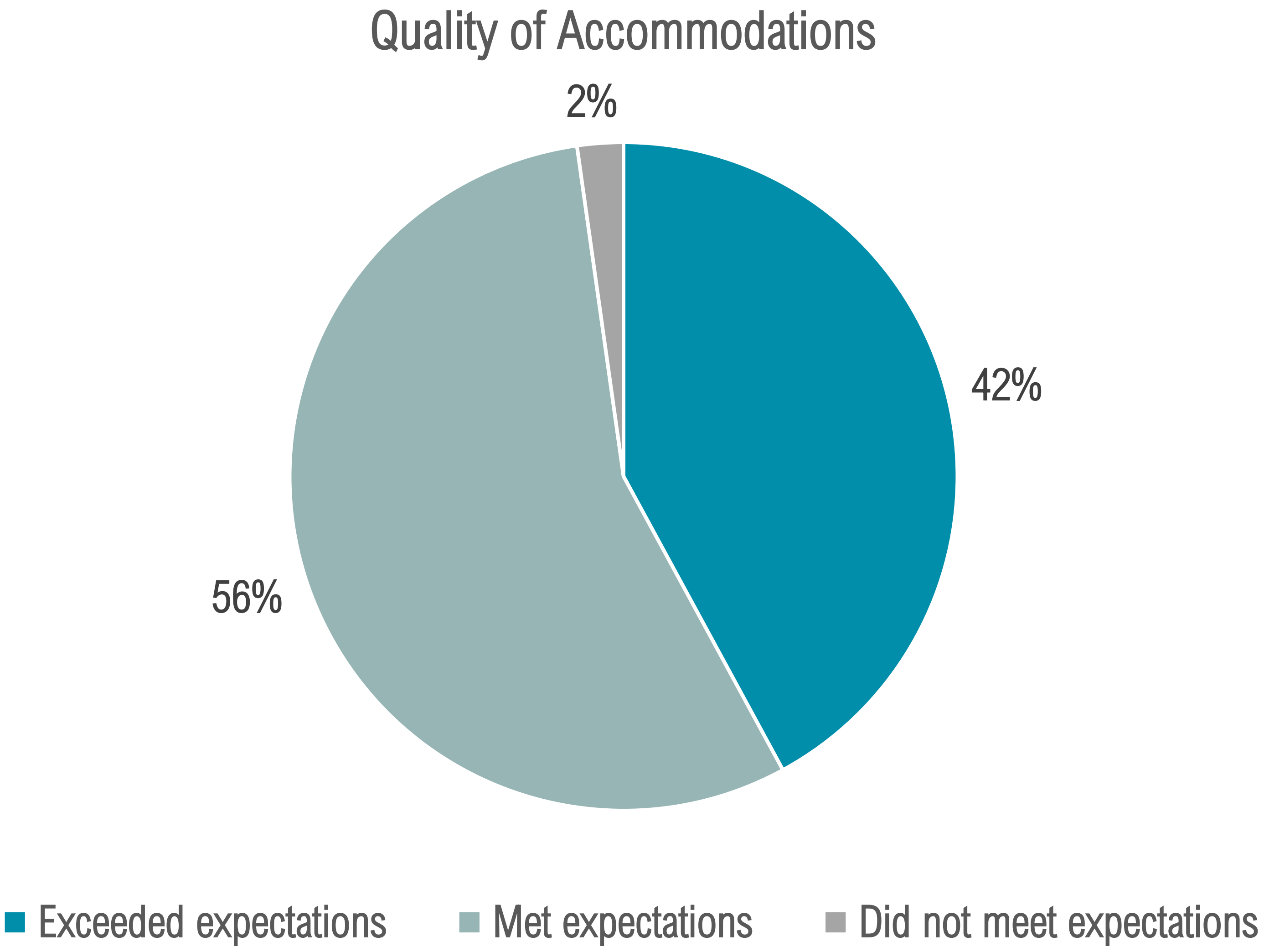
CROSSTABULATIONS: SATISFACTION WITH OVERALL VISIT

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2024	2025	2024	2025	2024	2025	2024	2025
Very Satisfied	62%	57%	56%	67%	55%	63%	76%	73%
Satisfied	35%	40%	41%	32%	42%	35%	23%	25%
Unsure/don't know	2%	2%	2%	1%	2%	2%	1%	2%
Dissatisfied	1%	1%	1%	<1%	1%	<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	
	2024	2025	2024	2025	2024	2025	2024	2025
Very Satisfied	64%	55%	55%	62%	59%	60%	62%	64%
Satisfied	32%	38%	41%	33%	37%	35%	34%	31%
Unsure/don't know	2%	5%	4%	4%	3%	4%	4%	5%
Dissatisfied	2%	2%	<1%	1%	1%	1%	<1%	<1%
Very Dissatisfied	<1%	<1%	<1%	<1%	<1%	<1%	<1%	<1%

SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

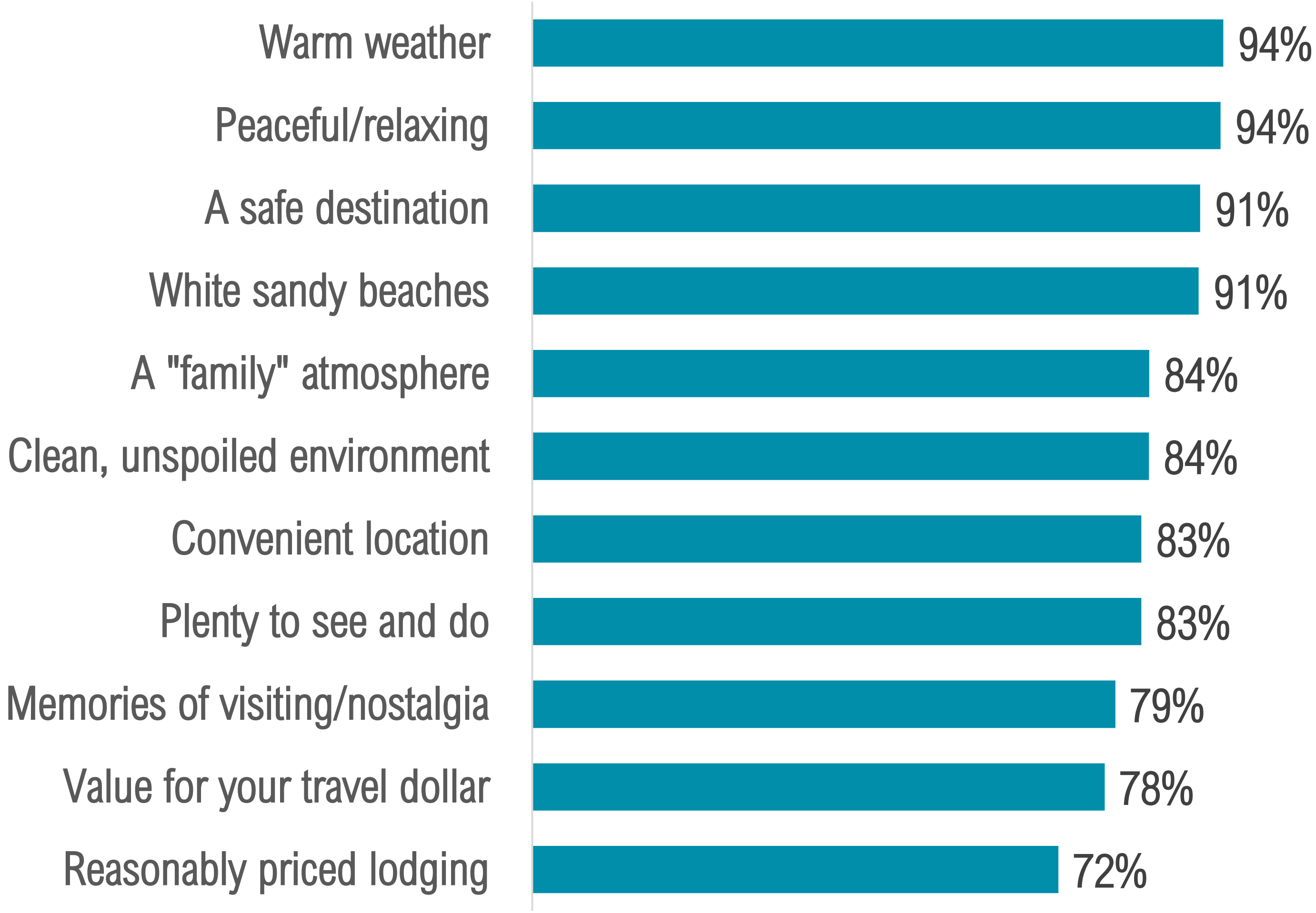


SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

	1st Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2024	2025	2024	2025	2024	2025	2024	2025
Exceeded Expectations	47%	38%	43%	46%	44%	41%	47%	61%
Met Expectations	47%	60%	53%	53%	51%	57%	50%	37%
Did Not Meet Expectations	6%	2%	4%	1%	5%	2%	3%	2%

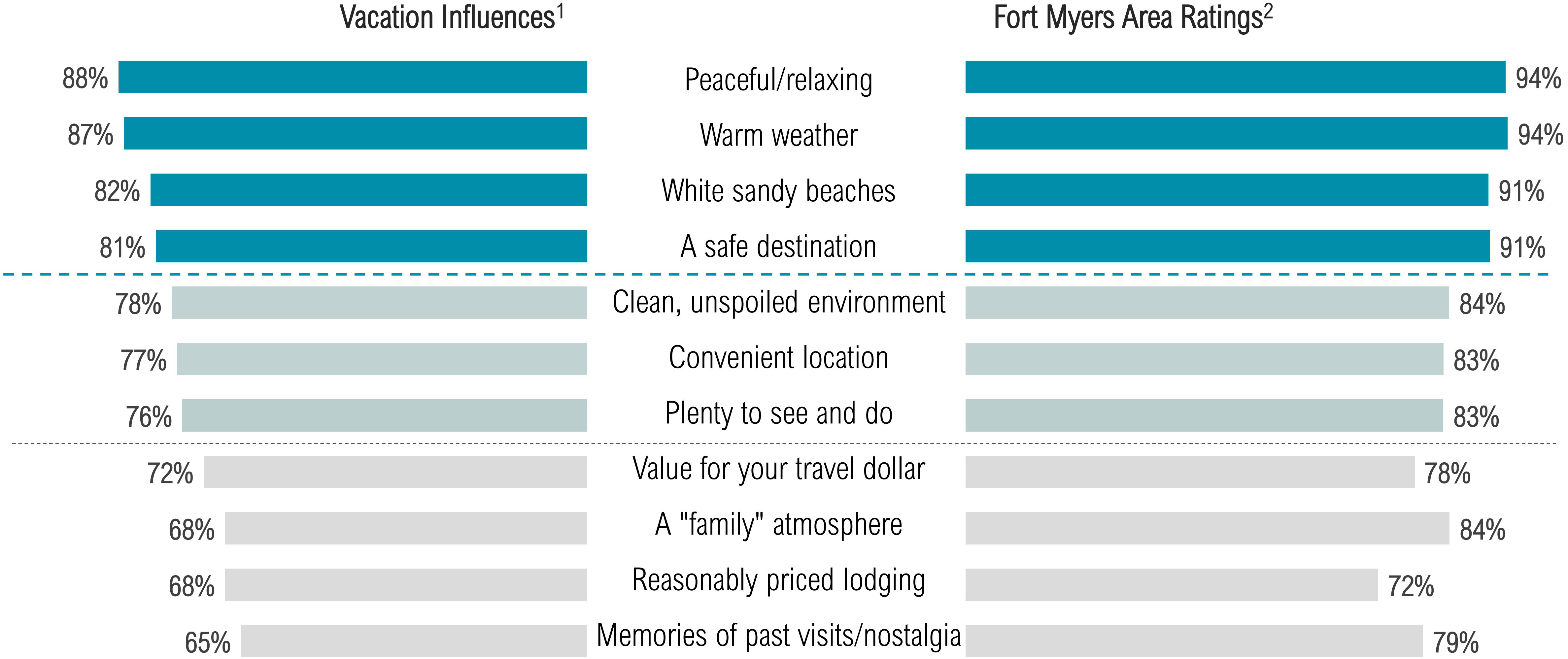
ATTRIBUTE RATINGS[1]

Over **9 in 10** 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



Vacation Influences[1]		Fort Myers Area Ratings[2]
88%	Peaceful/relaxing	94%
87%	Warm weather	94%
82%	White sandy beaches	91%
81%	A safe destination	91%
78%	Clean, unspoiled environment	84%
77%	Convenient location	83%
76%	Plenty to see and do	83%
72%	Value for your travel dollar	78%
68%	A "family" atmosphere	84%
68%	Reasonably priced lodging	72%
65%	Memories of past visits/nostalgia	79%

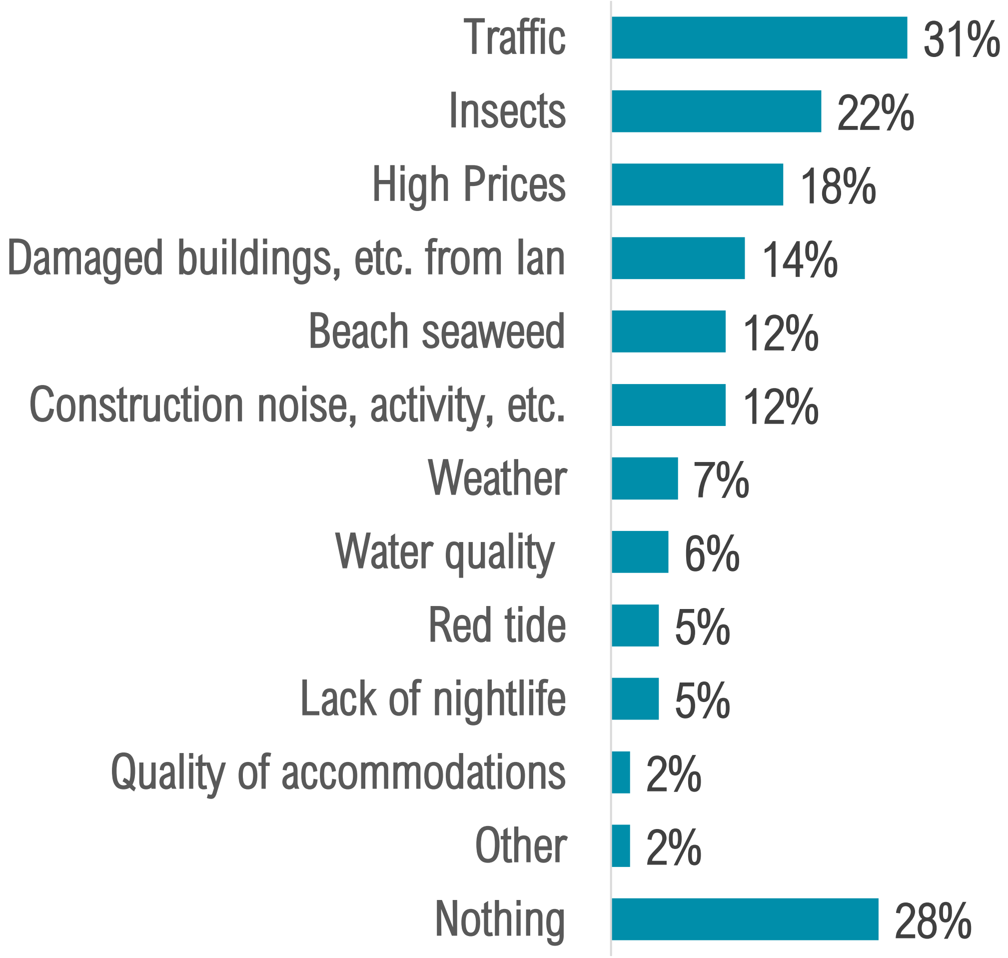
[1] Top 2 box scores. Attributes rated on a scale from 1 to 5 where 1 is Not at All Influential and 5 is Definitely Influential.

[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
Apr - Jun 2025

LEAST LIKED FEATURES[1]

Over 3 in 10 visitors mentioned **traffic,** while **around 1 in 5** were concerned with **insects** or **high prices** and another **nearly 3 in 10** 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

Great Weather

- “I love this area for its tropical weather: blue skies and sunshine!”
- “The weather is generally sunny and calm.”
- “Warm days, gorgeous sunsets, and cool nights.”

Laid Back & Relaxing

- “Sitting on my balcony overlooking the water and listening to the sound of the waves was unbeatable.”
- “The walkable downtown makes it easy to get wherever you want.”
- “We come here because it’s less busy than other beach destinations.”
- “Nice culture, fun people, very relaxed environment.”

AREA DESCRIPTIONS

Beautiful Beaches

- “The beaches are pristine and the waters are calm and clear.”
- “We spent hours walking along the beach looking for seashells – there are so many!”
- “No beach I’ve ever been to compares to Bonita Beach!”
- “Some of the cleanest beaches you’ll find.”

Safe & Family-Friendly

- “I felt safe not constantly supervising my teen.”
- “There was plenty to do here with my family, from shopping to restaurants.”
- “Less crowded than other areas in Florida, which made me feel safer.”
- “The kids loved the shell museum and aquarium!”

OCCUPANCY BAROMETER[1]: JUL – SEP RESERVATIONS

Jul – Sep Reservations	Jul – Sep 2024	Jul – Sep 2025
Up	49%	22%
Same	14%	22%
Down	37%	56%

[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 2024, would you say the total level of reservations are up, the same, or down?”

OCCUPANCY BAROMETER[1]: OCT - DEC RESERVATIONS

Oct - Dec Reservations	Oct – Dec 2024	Oct – Dec 2025
Up	34%	23%
Same	38%	23%
Down	28%	54%

---

[1] Sources: Occupancy Survey
Accommodations partners were asked the following, “Please think about your reservations for the next three months. Compared to October through December of 2024, would you say the total level of reservations are up, the same, or down?”

Year-Over-Year Comparisons

ECONOMIC IMPACT

Visitor & Lodging Statistics[1]	Apr – Jun 2024[4]	Apr - Jun 2025	% Change '24 – '25
Visitors	808,900	862,700	+ 6.7%
Visitor Days	4,999,000	4,926,000	- 1.5%
Room Nights	1,029,300	1,097,600	+ 6.6%
Direct Expenditures[2]	$747,288,600	$770,867,500	+ 3.2%
Total Economic Impact[3]	$1,158,297,300	$1,193,154,900	+ 3.0%
Occupancy	55.8%	52.4%	- 6.0%
ADR	$170.05	$187.45	+ 10.2%
RevPAR	$94.83	$98.28	+ 3.6%

[1] Significantly more (+13.4%) units were available in Apr-Jun 2025 compared to Apr-Jun 2024. 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] Spending and Economic Impact data has been slightly revised to reflect an updated IMPLAN dataset.

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM[1]

	Apr – Jun 2024[4]	Apr – Jun 2025	% Change ’24 – ‘25
Direct Jobs[2]	5,050	5,190	2.8%
Total Jobs[3]	6,930	7,150	3.2%
Direct Wages[2]	$169,838,800	$174,338,900	2.6%
Total Wages[3]	$251,023,800	$258,968,800	3.2%
Direct Local Taxes[2]	$26,512,004	$28,072,600	5.9%
Total Local Taxes[3]	$34,313,500	$36,179,700	5.4%
Direct State Taxes[2]	$26,053,500	$27,588,500	5.9%
Total State Taxes[3]	$33,938,600	$35,782,900	5.4%

[1] Calculated using IMPLAN, an economic impact analysis software.

[2] Only accounts for the money spent directly by visitors in categories such as accommodations, restaurants, entertainment, shopping, transportation, groceries, and “other” expenses.

[3] Accounts for direct spending as well as the indirect and induced effects of visitor spending. In other words, it considers the “Total Economic Impact”. As a reminder, indirect effects include increased business spending resulting from tourism dollars, while induced effects include increased household spending resulting from tourism dollars.

[4] Spending and Economic Impact data has been slightly revised to reflect an updated IMPLAN dataset.

VISITOR TYPE

Visitor Type	Apr – Jun 2024	Apr – Jun 2025
Visitors in Paid Accommodations	66%	69%
Visitors in Non-Paid Accommodations	33%	30%
Day Trippers	1%	1%

PRE-VISIT

Planned trip in advance	Apr – Jun 2024	Apr – Jun 2025
1 week or less	5%	5%
2-4 weeks	12%	15%
1-2 months	39%	34%
3-6 months	31%	31%
6 months or more	13%	15%
Not sure	<1%	<1%

Considered Other Destinations	Apr – Jun 2024	Apr – Jun 2025
Yes	29%	24%
No	71%	76%

PRE-VISIT

Other destinations considered[1]	Apr – Jun 2024[2]	Apr – Jun 2025[2]
Naples/Marco Island	21%	22%
Tampa/Clearwater/St. Pete	15%	20%
Keys/Key West	11%	20%
Miami/Ft. Lauderdale	11%	17%
Sarasota/Siesta Key	18%	15%
Orlando	10%	15%
West Palm Beach	5%	7%
Daytona Beach	6%	6%
Punta Gorda/Englewood	8%	4%
Other destinations in FL	16%	15%
Other destinations outside of FL	21%	19%

[1] Multiple responses permitted.

[2] Base: 24% of visitors who considered other destinations.

PRE-VISIT

Trip Planning Websites/Apps[1]	Apr – Jun 2024	Apr – Jun 2025
Airline websites/apps	33%	28%
Online search engines	28%	25%
Hotel websites/apps	16%	19%
Booking websites	19%	19%
Airbnb, Vrbo, etc.	22%	18%
Trip Advisor	9%	13%
Vacation rental websites/apps	18%	13%
Visit Florida	5%	9%
VCB Facebook Page	7%	9%
Facebook	5%	8%
Instagram	3%	8%
www.VisitFortMyers.com	7%	7%
Traveler reviews, blogs, stories	8%	7%
YouTube, Hulu, Pandora	3%	6%
Other	3%	2%
None	22%	24%

[1] Multiple responses permitted.

PRE-VISIT

Information Requests[1]	Apr – Jun 2024	Apr – Jun 2025
Calling a hotel, motel, condo	20%	16%
Requesting and receiving a visitor guide	5%	8%
Calling the VCB	5%	6%
Receiving the VCB e-newsletter	2%	4%
Calling a local Chamber of Commerce	1%	2%
Other	2%	1%
None	74%	75%

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[1] Multiple responses permitted.

PRE-VISIT

Recall of Lee County Promotions	Apr – Jun 2024	Apr – Jun 2025
Yes	37%	32%
No	46%	49%
Can't recall	17%	19%
% of recallers influenced by promotions	51%	56%
% of total visitors influenced by promotions	19%	18%

PRE-VISIT

Type of Promotions Recalled[1]	Apr – Jun 2024[2]	Apr – Jun 2025[3]
Social media	35%	42%
Internet	44%	39%
Television	14%	17%
Traveler reviews, blogs	18%	15%
www.VisitFortMyers.com	9%	11%
Travel/visitor guide	8%	10%
Magazine	9%	9%
AAA	4%	9%
Brochure	6%	8%
Newspaper	8%	7%
Email/e-newsletter	8%	7%
Radio	3%	5%
Video streaming services	5%	5%
Billboard	5%	4%
Deal-based promotion	1%	2%
Podcasts	<1%	2%
Music streaming services	1%	1%
Other	3%	1%

[1] Multiple responses permitted.

[2] Base: 37% of visitors who recalled seeing a promotion.

[3] Base: 32% of visitors who recalled seeing a promotion.

fort MYERS
ISLANDS, BEACHES & NEIGHBORHOODS

downs & st. germain
RESEARCH

PRE-VISIT

Characteristics influencing decision to visit Lee County (top 2 boxes)[1]	Apr – Jun 2024	Apr – Jun 2025
Peaceful/relaxing	90%	88%
Warm weather	91%	87%
White sandy beaches	83%	82%
A safe destination	86%	81%
Clean, unspoiled environment	76%	78%
Convenient location	78%	77%
Plenty to see and do	79%	76%
Value for your travel dollar	74%	72%
Reasonably priced lodging	65%	68%
A "family" atmosphere	78%	68%
Memories of past visits/nostalgia	71%	65%

[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]	Apr – Jun 2024	Apr – Jun 2025
Relax & unwind	50%	53%
Beach	42%	51%
Visit friends/relatives	35%	30%
Special occasion	11%	10%
Attractions	6%	10%
Nature, environment, bird watching	7%	8%
Fishing	11%	8%
Shopping	6%	7%
Golf or tennis	7%	6%
Water sports	4%	5%
Business meetings/conferences	3%	4%
Special event	3%	3%
Part-time resident	11%	3%
Museums, history	2%	2%
Biking, hiking	2%	2%
Photography	2%	2%
Guided tours	1%	2%
Diving, snorkeling	1%	2%
Culture	1%	2%
Sporting event	3%	2%
Work-related Hurricane Recovery	2%	1%
Volunteering	1%	<1%
Checking on my property	12%	1%
Other	5%	1%

[1] Multiple responses permitted.

PRE-VISIT

Transportation	Apr – Jun 2024	Apr – Jun 2025
Fly	66%	66%
Drive a personal vehicle	30%	26%
Drive a rental vehicle	3%	7%
Drive an RV	1%	1%
Travel by bus	<1%	<1%
Other	<1%	<1%

Airport Used	Apr – Jun 2024	Apr – Jun 2025
Southwest Florida International	81%	79%
Punta Gorda	13%	7%
Ft. Lauderdale International	2%	4%
Miami International	2%	3%
Orlando International	1%	3%
Tampa International	<1%	3%
Other	1%	1%

TRAVEL PARTY PROFILE

Visitor Origin[1]	Apr – Jun 2024	Apr – Jun 2025
Florida	8.7%	7.3%
Southeast	20.5%	20.5%
Northeast	18.6%	24.7%
Midwest	33.4%	30.0%
West	10.2%	7.8%
Canada	5.0%	5.5%
United Kingdom	0.6%	0.9%
Germany	1.4%	1.2%
Other Europe	0.4%	0.3%
Other International	1.2%	1.8%

Visitor Origin[1]	Apr – Jun 2024	Apr – Jun 2025
New York	5%	7%
Chicago	5%	5%
Philadelphia	2%	4%
Atlanta	4%	4%
Minneapolis-Saint Paul	4%	4%
Boston	3%	3%
Detroit	3%	3%
Washington, DC-Hagerstown	2%	3%

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

TRAVEL PARTY PROFILE

Travel Parties	Apr – Jun 2024	Apr – Jun 2025
Mean travel party size[1]	3.0	2.9
Travel with children under age 18	34%	26%

Travel Party Composition	Apr – Jun 2024	Apr – Jun 2025
As a couple	38%	37%
As a family	40%	35%
By yourself	10%	14%
With other couples/friends	9%	12%
With business associates	2%	2%
In a tour group	<1%	<1%
Other	1%	<1%

[1] Sources: Occupancy Study and Visitor Tracking Study

TRAVEL PARTY PROFILE

Marital Status	Apr – Jun 2024	Apr – Jun 2025
Married/Domestic Partnership	78%	69%
Single	22%	31%

Age	Apr – Jun 2024	Apr – Jun 2025
Average age	50	52
Median age	50	53

Household Income	Apr – Jun 2024	Apr – Jun 2025
Median Income	$106,800	$102,900

TRAVEL PARTY PROFILE

Race/Ethnicity	Apr – Jun 2024	Apr – Jun 2025
Caucasian/White	80%	80%
Hispanic/Latino/Latina/Latinx	13%	9%
African American/Black	4%	6%
Asian/Asian American/Pacific Islander	2%	3%
Middle Eastern/Northern African	<1%	1%
Another race/ethnicity	1%	1%

Gender[1]	Apr – Jun 2024	Apr – Jun 2025
Male	46%	42%
Female	53%	58%
Non-binary	1%	<1%

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[1] Of person interviewed.

TRIP EXPERIENCE

Length of Stay[1]	Apr – Jun 2024	Apr – Jun 2025
Average nights in the Fort Myers area	6.2	5.7

First Time/Repeat Visitors	Apr – Jun 2024	Apr – Jun 2025
First-time	26%	31%
Repeat	74%	69%

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

TRIP EXPERIENCE

Type of Accommodations	Apr – Jun 2024	Apr – Jun 2025
Hotel/motel/resort	31%	35%
Vacation rental home	32%	28%
Friends/family home	15%	17%
Personal second home	18%	13%
Bed & Breakfast/Inn	2%	4%
Not spending the night	1%	1%
Campground/RV Park	1%	1%
Other	<1%	1%

TRIP EXPERIENCE

Activities[1]	Apr – Jun 2024	Apr – Jun 2025
Relax & unwind	72%	71%
Beach	68%	67%
Restaurants	63%	64%
Visit friends/relatives	51%	43%
Shopping	39%	41%
Nature, environment, bird watching	24%	26%
Attractions	15%	21%
Bars, nightclubs	13%	20%
Water sports	22%	19%
Fishing	26%	17%
Golf or tennis	17%	14%
Biking, hiking	9%	12%
Special occasion	12%	10%
Photography	8%	9%
Guided tours	8%	9%
Culture	8%	9%
Special event	8%	7%
Museums, history	9%	7%
Diving, snorkeling	6%	6%
Spas	3%	5%
Business meetings/conferences	3%	4%
Sporting event	5%	4%
Volunteering	3%	1%
Other	1%	<1%

[1] Multiple responses permitted.

TRIP EXPERIENCE

Attractions[1]	Apr – Jun 2024	Apr – Jun 2025
Beaches	68%	73%
Sanibel Lighthouse	26%	27%
Fort Myers Beach Pier Area[2]	10%	25%
Bell Tower Shops	29%	18%
Edison & Ford Winter Estates	26%	17%
Gulf Coast Town Center	17%	16%
Miromar Outlets Mall	12%	15%
Coconut Point Mall	15%	14%
Manatee Park	3%	9%
J.N. Ding Darling National Wildlife Refuge	8%	8%
Periwinkle Place	3%	6%
Bailey-Matthews Shell Museum	6%	5%
Broadway Palm Dinner Theater	2%	5%
Barbara B. Mann Performing Arts Hall	2%	4%
Other	4%	3%
None	11%	11%

[1] Multiple responses permitted.

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

TRIP EXPERIENCE

Area stayed	Apr – Jun 2024	Apr – Jun 2025
Fort Myers	33%	29%
Fort Myers Beach	11%	21%
Sanibel Island	7%	12%
Cape Coral	18%	12%
Bonita Springs	11%	10%
Captiva Island	6%	4%
Estero	6%	4%
North Fort Myers	2%	3%
Lehigh Acres	2%	1%
Pine Island	1%	1%
Boca Grande/Outer Islands	1%	1%
Along I-75	1%	1%
None/not staying overnight	1%	1%

POST-TRIP EVALUATION

Likelihood of Recommending the Area	Apr – Jun 2024	Apr – Jun 2025
Very Likely	49%	62%
Likely	44%	32%
Unsure/don't know	6%	5%
Unlikely	1%	<1%
Very Unlikely	<1%	1%

Likelihood of Returning to the Area	Apr – Jun 2024	Apr – Jun 2025
Very Likely	53%	66%
Likely	38%	26%
Unsure/don't know	8%	3%
Unlikely	1%	4%
Very Unlikely	<1%	1%

Likelihood of Returning Next Year	Apr – Jun 2024	Apr – Jun 2025
Very Likely	47%	60%
Likely	26%	22%
Unsure/don't know	22%	12%
Unlikely	4%	5%
Very Unlikely	1%	1%

POST-TRIP EVALUATION

Satisfaction with Accommodations	Jan - Mar 2024	Jan - Mar 2025
Exceeded expectations	45%	42%
Met expectations	50%	56%
Did not meet expectations	5%	2%

POST-TRIP EVALUATION

Satisfaction with Visit	Jan - Mar 2024	Jan - Mar 2025
Very satisfied	57%	63%
Satisfied	39%	34%
Neither	2%	2%
Dissatisfied	1%	<1%
Very dissatisfied	<1%	<1%
Don't know/no opinion	1%	1%

Satisfaction with Customer Service	Jan - Mar 2024	Jan - Mar 2025
Very satisfied	56%	59%
Satisfied	39%	35%
Somewhat satisfied	3%	4%
Dissatisfied	1%	1%
Very dissatisfied	<1%	<1%
Don't know/no opinion	1%	1%

POST-TRIP EVALUATION

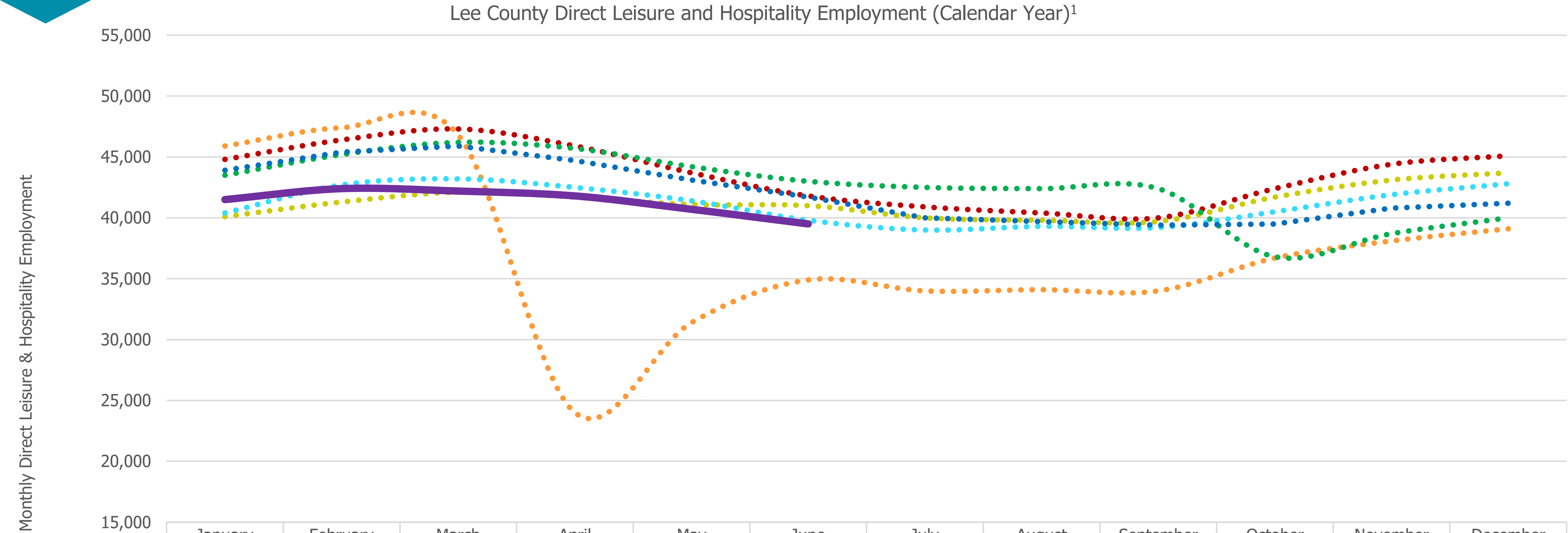
Visitor Concerns[1]	Apr – Jun 2024	Apr – Jun 2025
Traffic	32%	31%
Insects	16%	22%
High Prices	15%	18%
Damaged buildings, etc. from Ian	24%	14%
Beach seaweed	7%	12%
Construction noise, activity, etc.	16%	12%
Weather	6%	7%
Water quality	5%	6%
Red tide	5%	5%
Lack of nightlife	4%	5%
Quality of accommodations	2%	2%
Other	3%	2%
Nothing	23%	28%

[1] Multiple responses permitted.

Industry Data

LEISURE & HOSPITALTY EMPLOYMENT

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



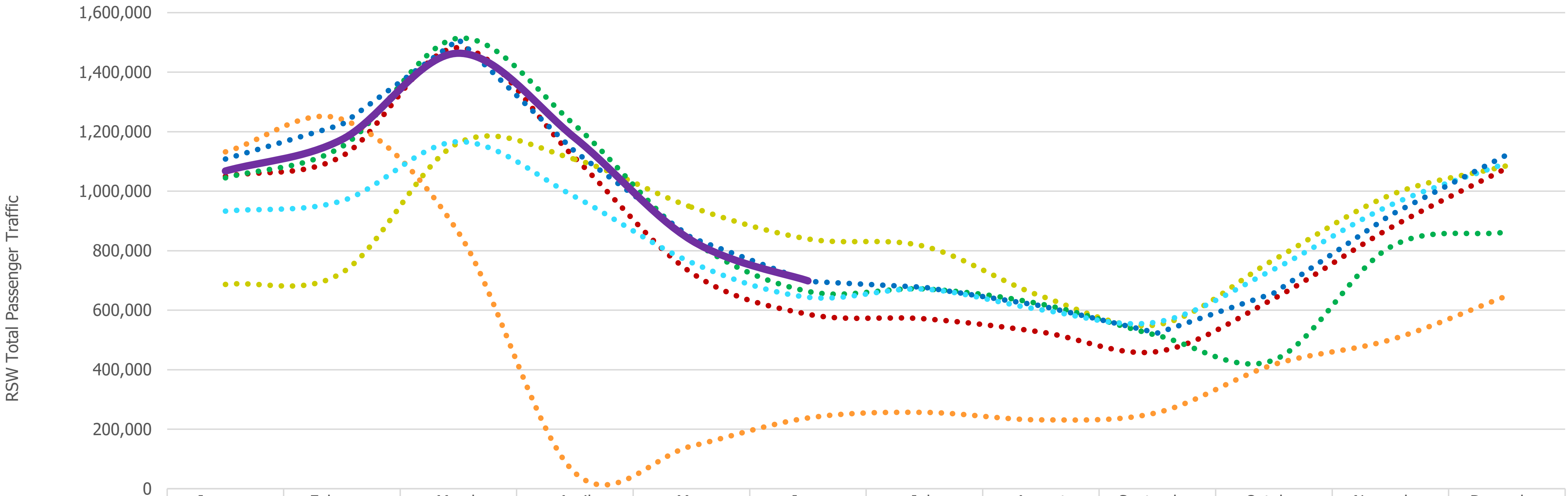
	January	February	March	April	May	June	July	August	September	October	November	December
•••• 2019	44,800	46,400	47,300	45,900	43,700	41,800	40,900	40,400	40,000	42,400	44,400	45,100
•••• 2020	45,900	47,400	46,800	24,000	31,400	34,900	34,000	34,100	34,000	36,700	38,100	39,100
•••• 2021	40,100	41,300	42,100	41,700	41,100	41,000	40,000	39,800	39,700	41,700	43,100	43,700
•••• 2022	43,500	45,200	46,200	45,700	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	41,400	39,800	39,000	39,300	39,200	40,500	41,900	42,800
•••• 2024	43,900	45,400	45,900	44,700	43,100	41,700	40,000	39,700	39,400	39,500	40,800	41,200
▬ 2025	41,500	42,400	42,200	41,800	40,700	39,500 (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	657,488	919,108	1,121,793
━ 2025	1,067,794	1,173,638	1,463,628	1,178,980	834,862	698,573						

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

LICENSED TRANSIENT RENTAL UNITS

Licensed Transient Rental Units in Lee County, as of July 2025[1]

Lee County Area	Hotel	Motel	Bed & Breakfast	Vacation Rental	Total
Fort Myers	5,978	1,132	9	946	8,065
Cape Coral	584	204	0	2164	2,952
Fort Myers Beach	861	382	6	1370	2,619
Bonita Springs	1,244	38	0	878	2,160
Sanibel	68	685	0	1309	2,062
North Fort Myers	0	578	0	75	653
Estero	566	0	0	18	584
Boca Grande	77	107	0	296	480
Captiva	107	156	0	195	458
Lehigh Acres	75	0	0	188	263
Bokeelia	0	31	0	64	95
Saint James City	0	20	0	61	81
Matlacha	0	0	2	25	27
Iona	0	0	0	19	19
Burnt Store Marina	0	0	0	14	14
Cabbage Key	0	9	0	0	9
Alva	0	0	0	3	3
Miromar Lakes	0	0	0	1	1
Pineland	0	0	0	0	0
Total	**9,560**	**3,342**	**17**	**7,626**	**20,545**[2]

[1] SOURCE: Florida Department of Business & Professional Regulation.

[2] Some units are still unavailable due to the impact of Hurricane Ian.

Methodology

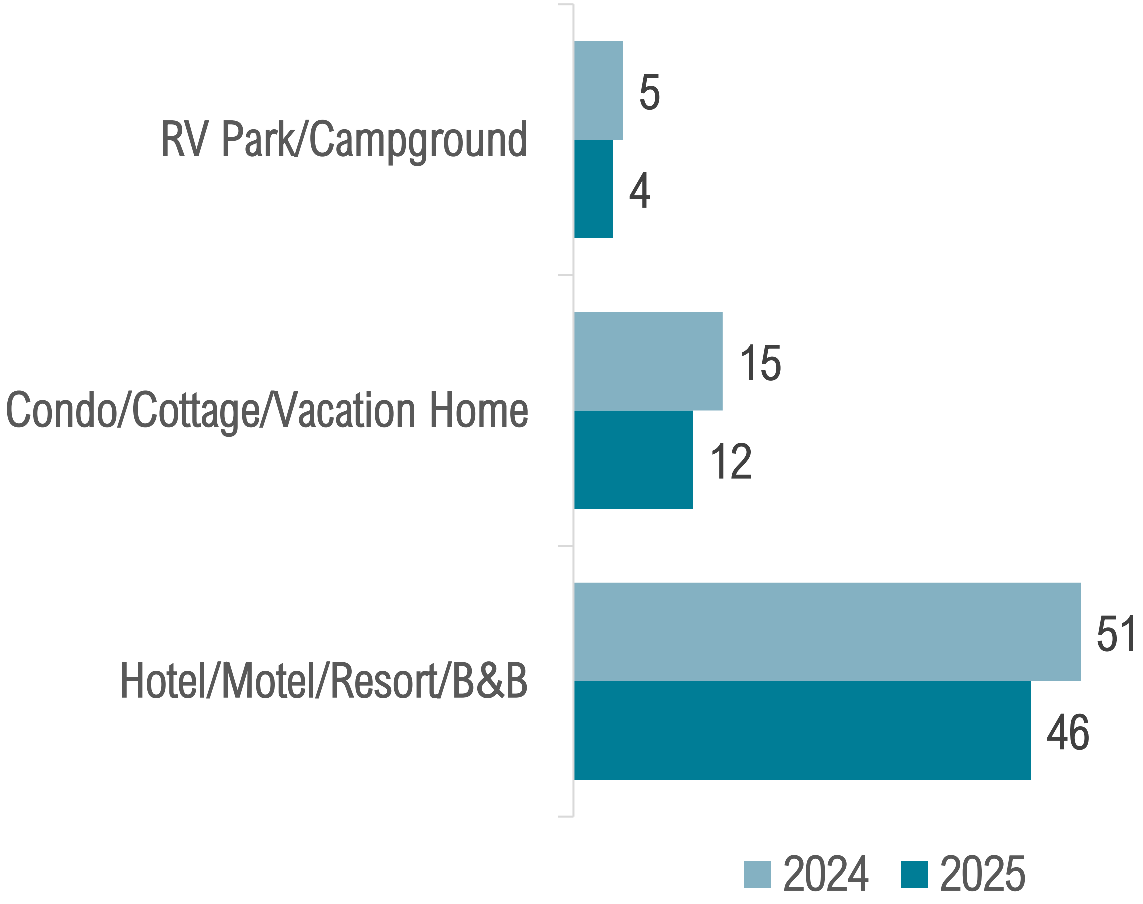
METHODOLOGY

- Economic Impact of tourism in Lee County is derived from:
  - Visitor Tracking Study
    - 909 surveys in public areas, hotels, at events around Lee County, and online via email or social media
    - Target individuals: April – June visitors to Lee County
    - Data Collection: April - June 2025
  - 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 6,891 hotel/rental/campground units (62 properties) reporting to DSG, 10,855 hotel units reporting to STR (89 properties), and 3,413 rental units (115 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: 62 completed surveys
    - Data Collection: Completed in July (for Apr – Jun 2025)
  - Total Sample Size:
    - Data from 6,891 hotel/rental/campground units reporting to DSG (representing 62 properties)
    - Data from 10,855 hotel units reporting to STR (representing 89 properties)
    - Data from 3,413 rental units reporting to KeyData (representing 115 property managers)

Number of Complete Responses



Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

Apr – Jun 2025

Visitor Tracking, Occupancy, & Economic Impact Study

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