Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

October - December 2025

Visitor Tracking, Occupancy & Economic Impact Study

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Introduction

STUDY OBJECTIVES: MAP THE VISITOR JOURNEY

Pre-Visit

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

Travel Party Profile

- Visitor origin
- Party size
- Party composition
- Demographics

Trip Experience

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

Post-Trip Evaluation

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

Economic Impact on Destination

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

Executive Summary

KEY PERFORMANCE INDICATORS[1,2]

913,200	1,213,600	$791,304,300	$1,224,787,200
Total Visitors	Room Nights	Direct Spending	Total Economic Impact
+ 5.3%	+ 12.5%	+ 18.8%	+ 18.6%

[1] Sources: DBPR, Smith Travel Research, Key Data, DSG Occupancy Study, and DSG Visitor Tracking Study
[2] Visitation grew less than Room Nights, Direct Spendings, and Total Economic Impact because of significant increases in spending per visitor driven largely by a significant increase in ADR.

LODGING METRICS[1]

HOTELS + VACATION RENTALS + CAMPGROUNDS

Occupancy	Average Daily Rate	Revenue Per Available Room
54.4%	$156.95	$85.44
-6.1%	+10.6%	+3.8%

HOTELS[2]

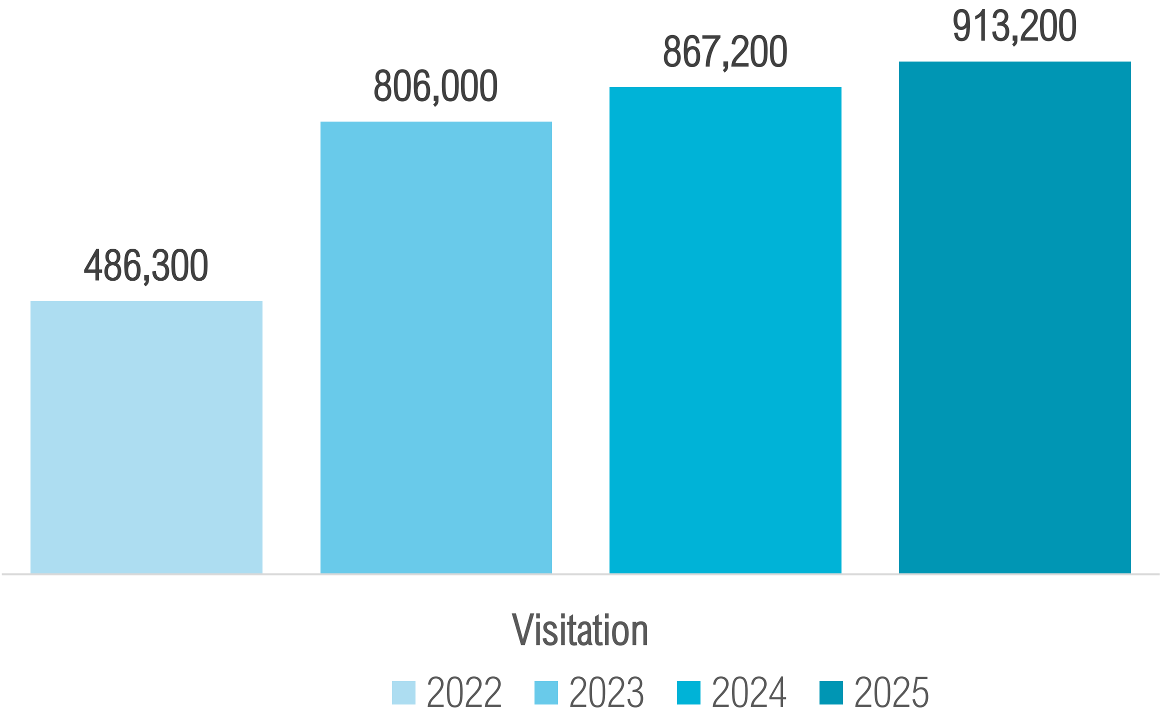
Occupancy	Average Daily Rate	Revenue Per Available Room
59.2%	$144.43	$85.50
-9.1%	+0.8%	-8.4%

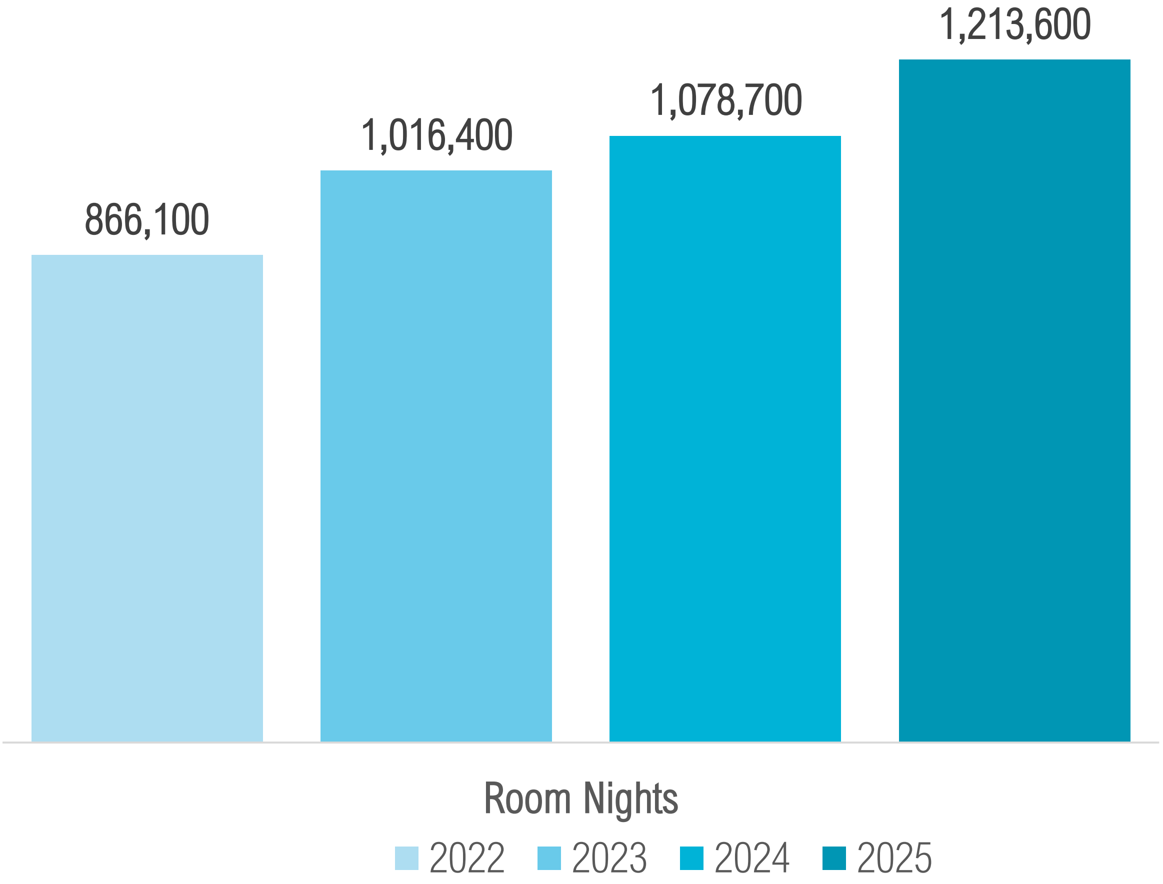
VACATION RENTALS[3]

Occupancy	Average Daily Rate	Revenue Per Available Room
35.1%	$260.00	$91.26
+17.4%	+15.6%	+35.7%

[1] Significantly more (+19.9%) units were available in Oct-Dec 2025 compared to Oct-Dec 2024. This is due to the ongoing recovery process post-Hurricane Ian as well as Helene and Milton.
[2] Hotel sources: Smith Travel Research & DSG Occupancy Study
[3] Vacation rental sources: DBPR, Key Data & DSG Occupancy Study

OCT-DEC 2022-2025 VISITATION & ROOM NIGHTS[1]





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

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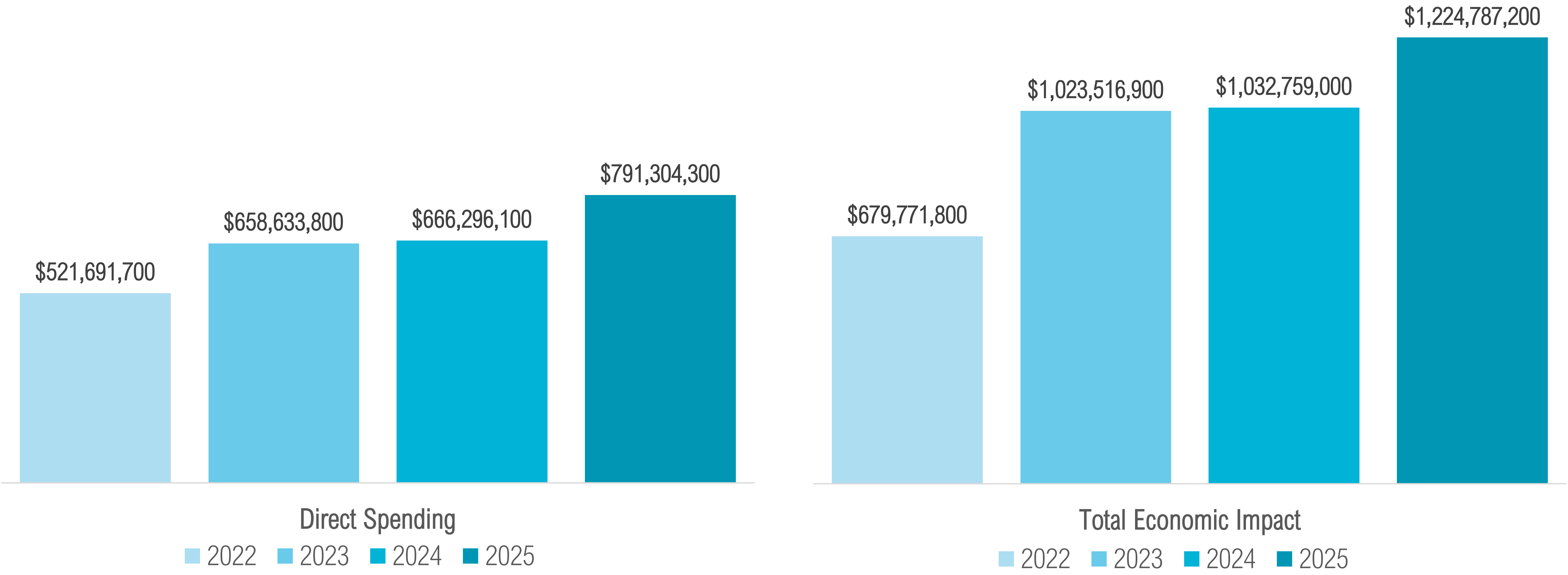
OCT-DEC 2022-2025 SPENDING & ECONOMIC IMPACT[1]



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

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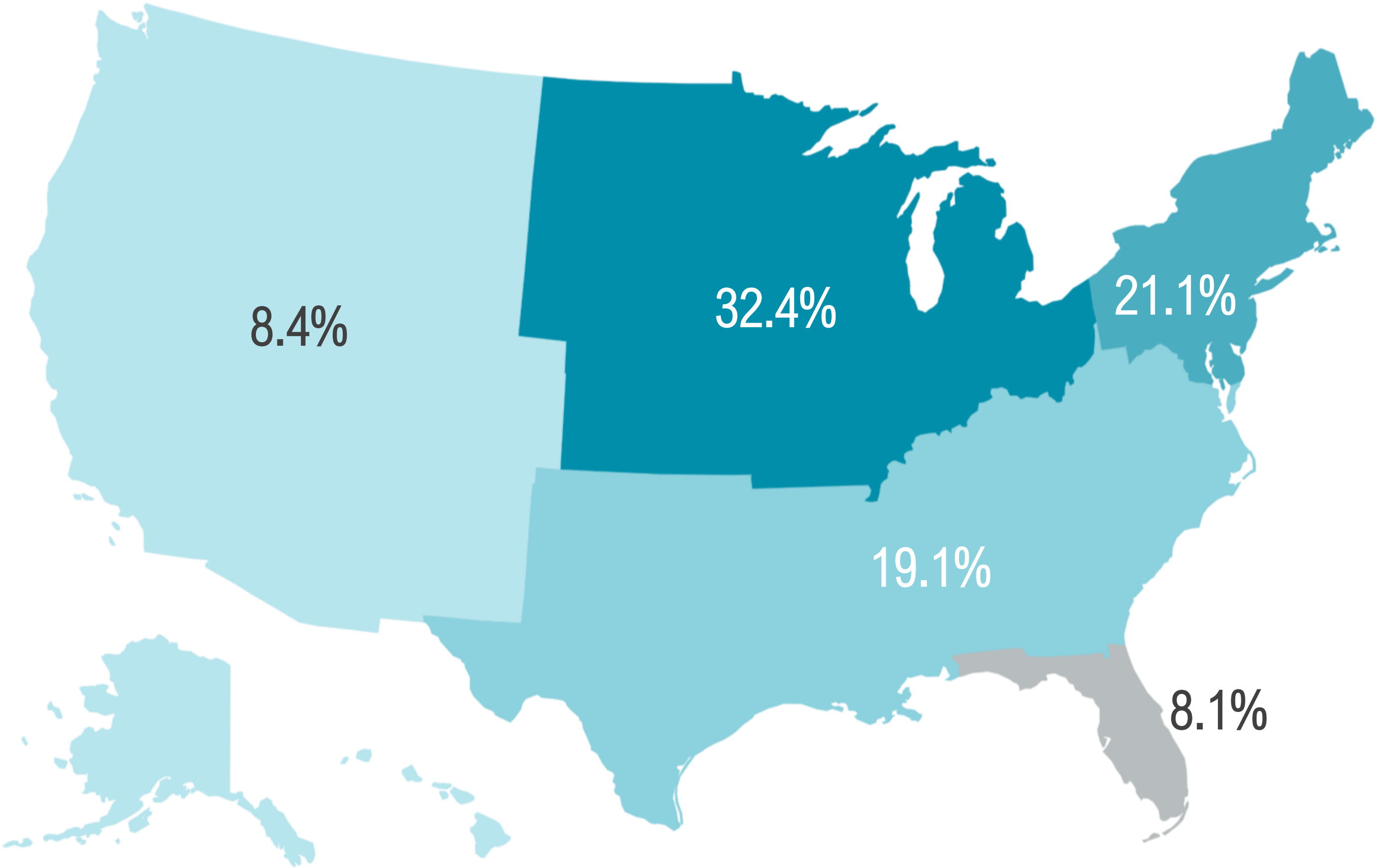
VISITOR ORIGINS



Domestic Origin Regions	Percent
Midwest	32.4%
Northeast	21.1%
Southeast	19.1%
West	8.4%
Florida	8.1%

International Origins	Percent
Canada	5.1%
Germany	2.7%
United Kingdom	1.2%
Other Europe	0.9%
Other International	1.0%

Top Origin Markets [1,2]	Percent
New York City	5.2%
Chicago	5.2%
Minneapolis-St. Paul	3.9%
Detroit	3.7%
Atlanta	3.5%
Boston	3.1%
Philadelphia	2.7%
Washington, DC-Hagerstown	2.6%
Cleveland-Akron	2.5%
Columbus, OH	2.2%
Denver	1.9%
Miami-Ft. Lauderdale	1.9%
Pittsburgh	1.8%
Dallas-Ft. Worth	1.7%
Tampa-St. Petersburg	1.7%
Milwaukee	1.5%
Nashville	1.5%

[1] "Markets" refer to DMAs (Designated Marketing Areas) as defined by Nielsen Media Research.
[2] Many DMAs extend beyond the borders of their core state, such the New York City DMA extending beyond the state of NY itself and including portions of NJ, CT, and PA, and the Washington, D.C. DMA extending beyond DC itself and including large portions of MD, VA, as well as some areas of WV.

VISITOR PROFILE

51

Median Age

18%

First-Time Visitor

$115,000

Median Household Income

26%

Traveled With Children

2.8

Travel Party Size

6.3

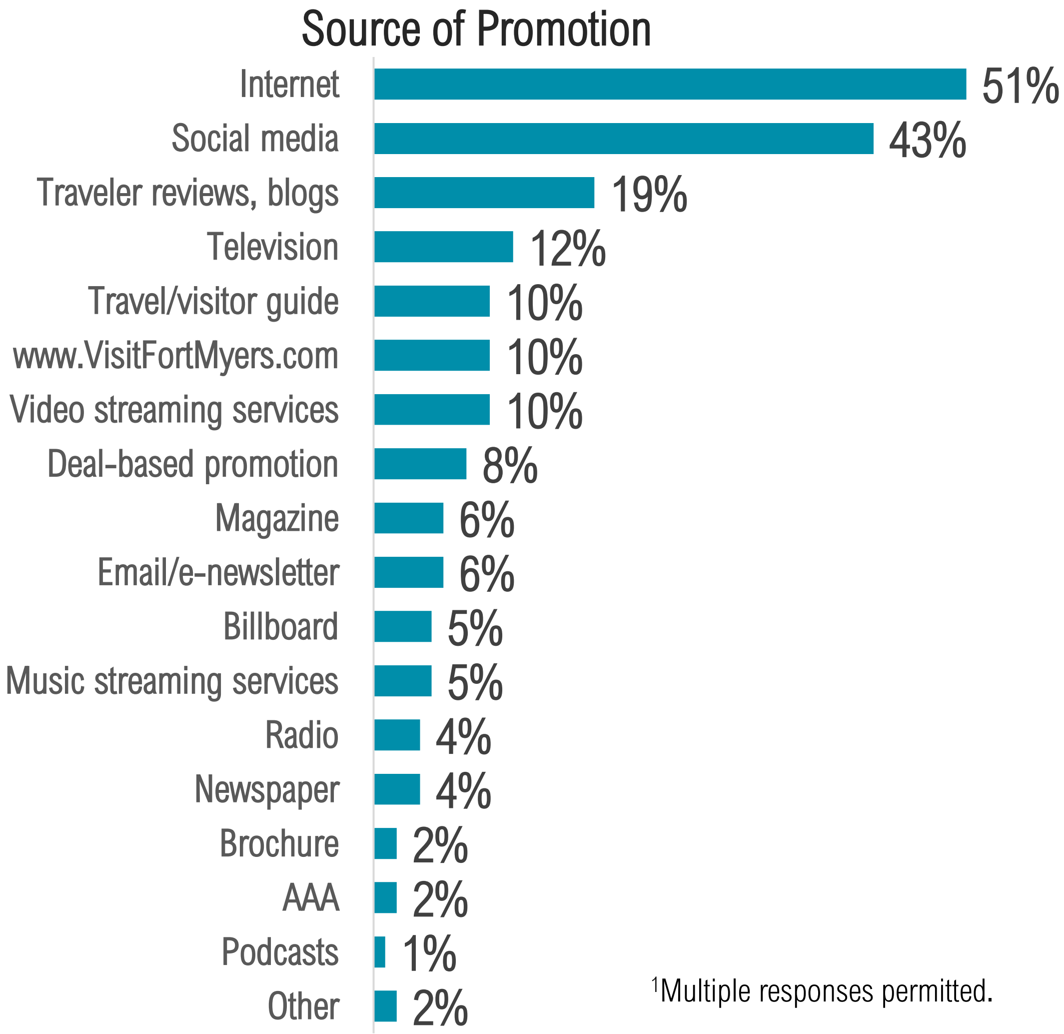
Length Of Stay

INFLUENCE OF PROMOTIONS[1]

Data Point: 64% of the visitors who recalled promotions for the Fort Myers area said that they influenced their travel plans (was 57% in 2024).

Insight: Promotional effectiveness is rising, suggesting that marketing efforts are connecting more strongly with travelers and converting awareness into genuine intent to visit.

BASE: 39% of visitors who recalled promotions

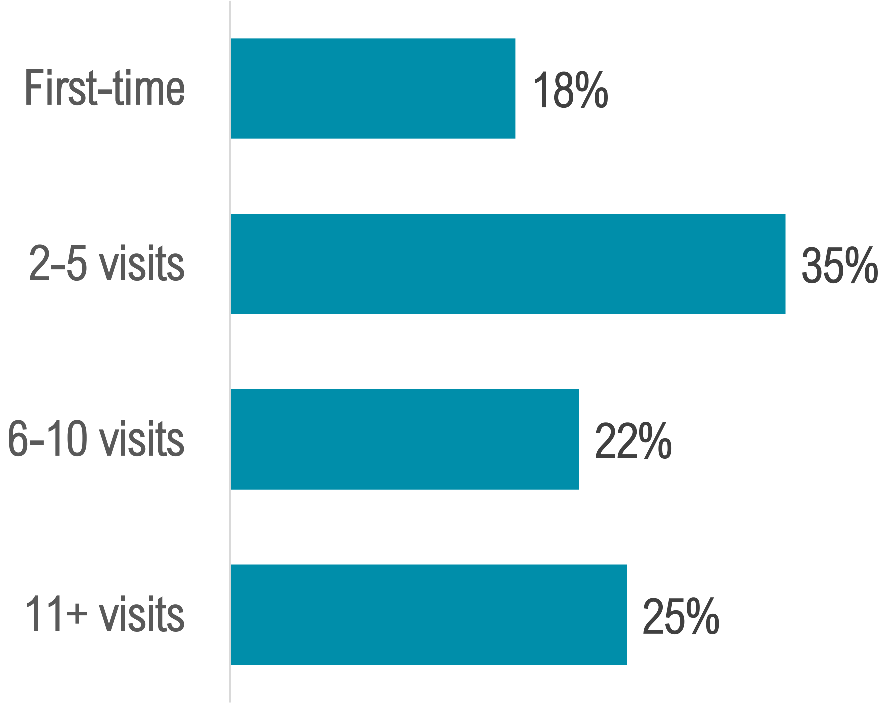


[1]Multiple responses permitted.

RETURN OF REPEAT & LOYAL VISITORS

Data Point: 82% of visitors to the Fort Myers area were repeat visitors (was 79% in 2024).

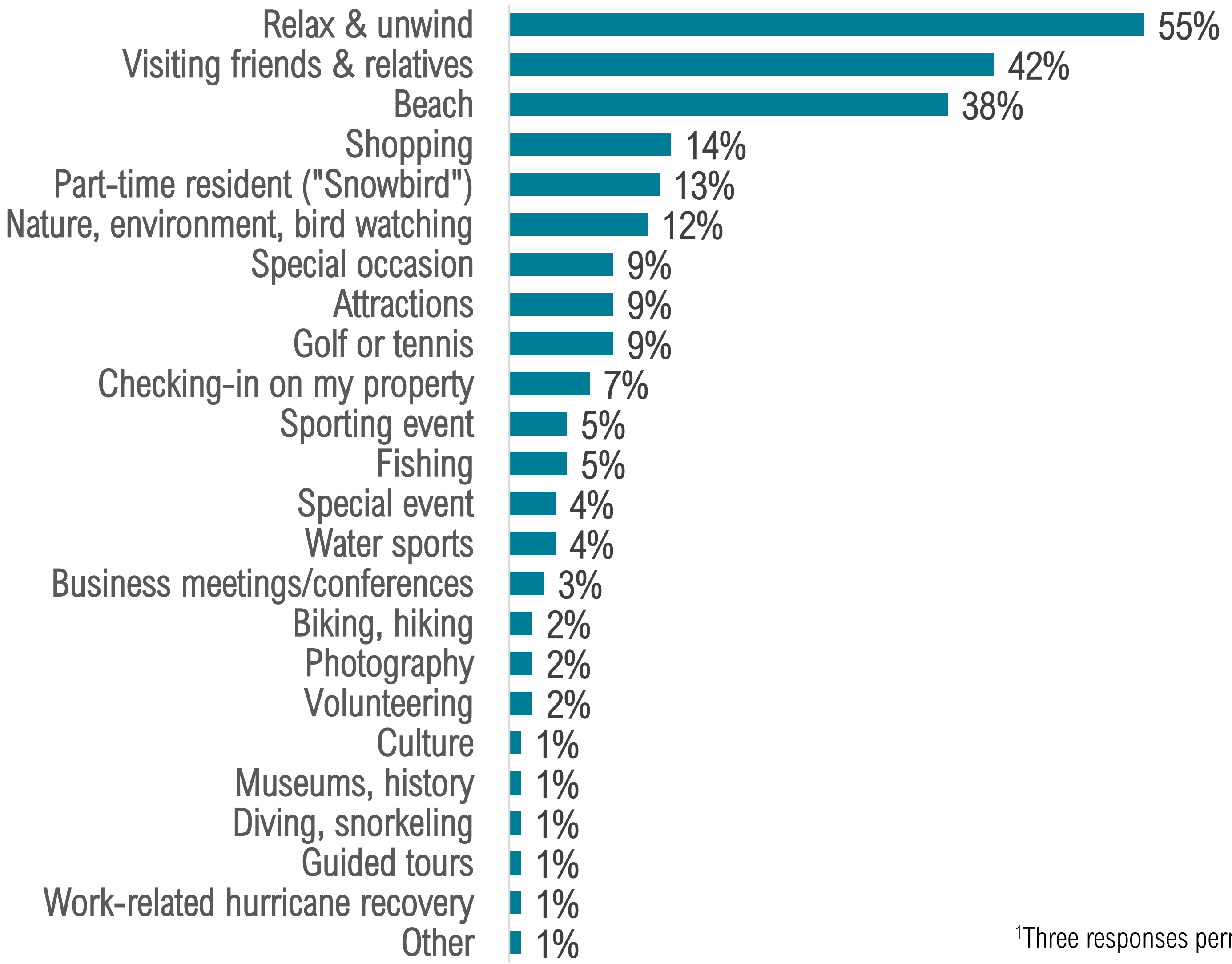
Insight: Repeat visitation continues to climb, reinforcing the strong loyalty appeal of the area. This is reinforced by only 19% of visitors saying they considered other destinations when planning their trip (down from 24% in 2024), meaning fewer travelers are comparison-shopping and more are committed to returning to the area from the beginning of their trip planning.



REASON FOR VISITING[1]

Data Point: Relax & unwind (+10%), the beach (+5%), and nature (+5%) were the main reasons for visiting that saw the largest increases, while checking in on property (-8%) saw the largest decrease.

Insight: As hurricane recovery continues, the core "traditional leisure vacationer" segment continues to represent a higher share of visitation. Additionally, just 1 in 10 visitors indicated that damaged buildings or ongoing construction negatively impacted their visit to the area (down from 1 in 7 visitors last year).

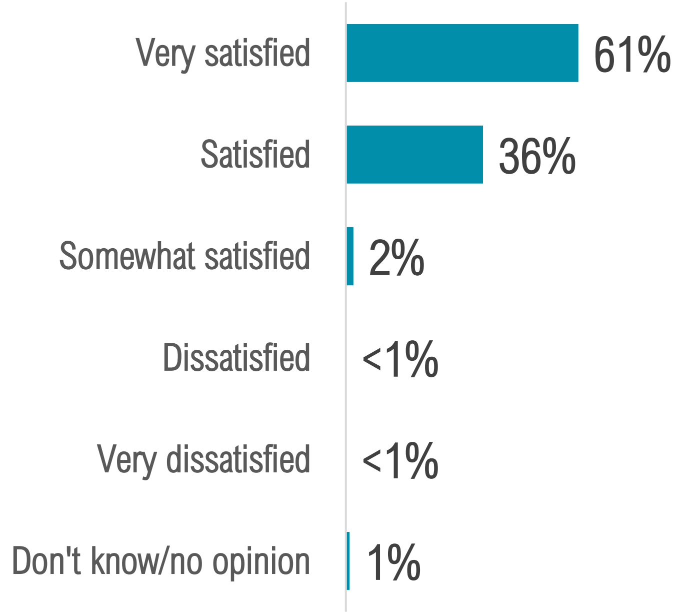


Pre-Visit
Oct – Dec 2025

[1]Three responses permitted.

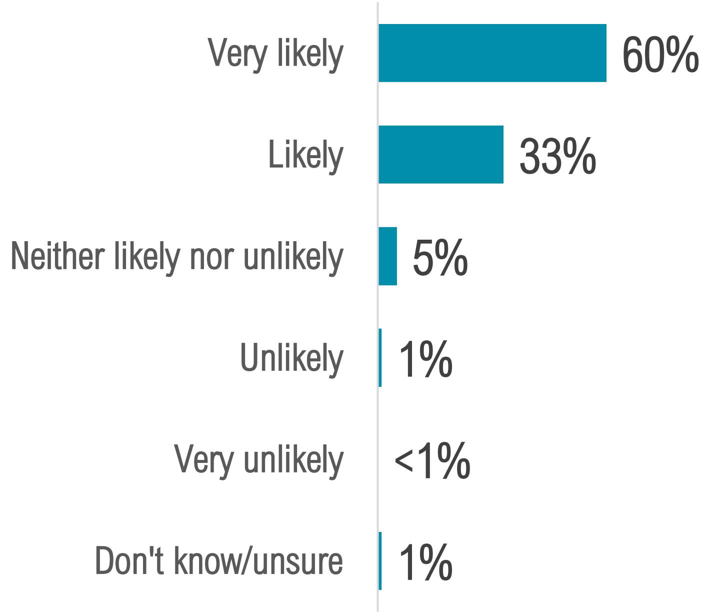
SATISFACTION STATISTICS

All satisfaction metrics were up significantly year-over-year



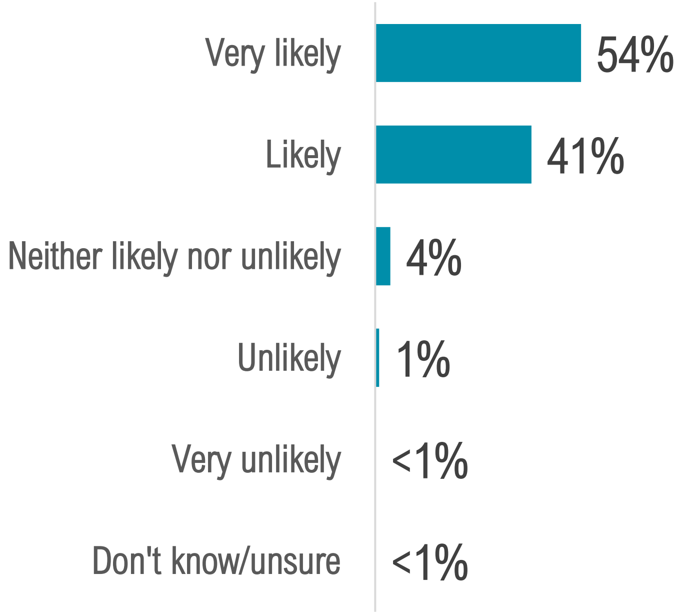
Overall Satisfaction with Stay

61% of visitors said they were **very satisfied** with their experience in the Fort Myers area (**up from 51%** in 2024)



Likelihood of Returning

60% of visitors said they would be **very likely to return** to the Fort Myers area (**up from 50%** in 2024)



Likelihood of Recommending

54% of visitors said they are **very likely to recommend the Fort Myers area** to friends and family (**up from 45%** in 2024)

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SELECTED VISITOR QUOTES ABOUT THE FORT MYERS AREA[1]

- "The area has a lot of the big city amenities while feeling more compact and easier to get around. Coming from Orlando, I like that we can access the beach very quickly while also enjoying restaurants, shopping, etc. all within the same day."
- "I tell my friends that they must visit Bonita Beach some time in their life! It is so beautiful and I am very glad that everyone goes to Miami beaches instead of here because Bonita Beach is like my wife and I's secret gem. We love this beach."
- "Our home away from home. The blue skies and sun make me so happy, especially now that the weather back home is sub zero. We're already planning to come back in March!"
- "A chill mix between beach town energy and quiet Florida nature. It's not crazy fast-paced like Miami or super-packed like Orlando, more laid-back, sunny, and easygoing. The beaches are the main vibe: soft sand, warm water, calm waves, and sunsets over the Gulf that look unreal. It's the kind of place where you can chill all day by the water, rent a kayak, go shell-hunting at Sanibel, or just walk around and eat ice cream."
- "We bought our (second) home here years ago because it was more affordable than some other areas in Florida. It's been a great investment and winter retreat for us. The proximity to beautiful beaches make this area so special. We enjoy a relaxed lifestyle with lots of boating, golf, and plenty of other outdoor activities."

[1]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

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TOURISM SNAPSHOT: KEY METRICS OCT-DEC 2024 VS. 2025

Visitor & Lodging Statistics	Oct - Dec 2024[3]	Oct - Dec 2025	% Change '24-'25
Visitors	867,200	913,200	+ 5.3%
Visitor Days	5,411,300	5,716,600	+ 5.6%
Room Nights	1,078,700	1,213,600	+ 12.5%
Direct Expenditures[1]	$666,296,100	$791,304,300	+ 18.8%
Total Economic Impact[2]	$1,032,759,000	$1,224,787,200	+ 18.6%

[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.

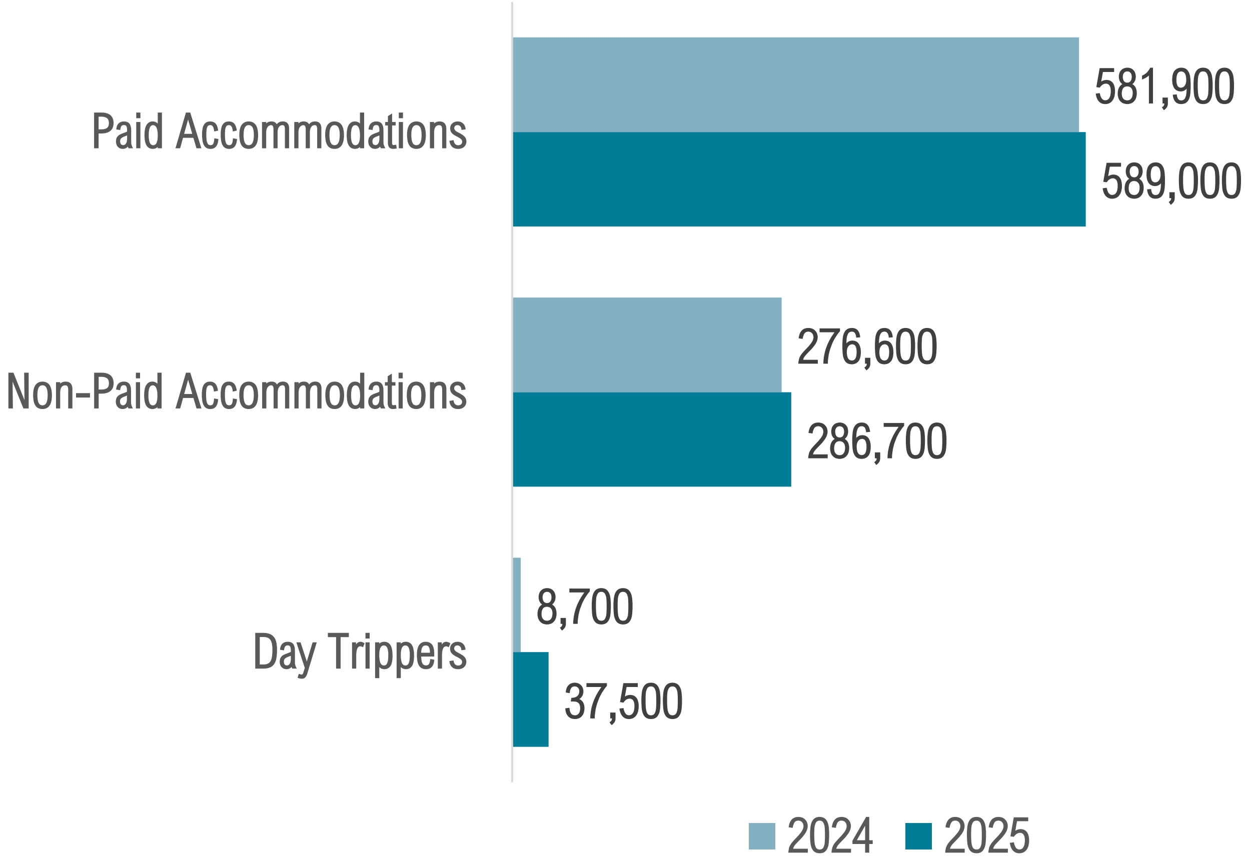
TOURISM SNAPSHOT: KEY METRICS CALENDAR YEAR 2024 VS. 2025

Visitor & Lodging Statistics	CY 2024[3]	CY 2025	% Change '24-'25
Visitors	3,199,500	3,320,700	+ 3.8%
Visitor Days	20,420,100	21,092,400	+ 3.3%
Room Nights	4,405,000	4,738,000	+ 7.6%
Direct Expenditures[1]	$3,083,501,800	$3,311,176,600	+ 7.4%
Total Economic Impact[2]	$4,779,936,100	$5,125,065,900	+ 7.2%

[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.

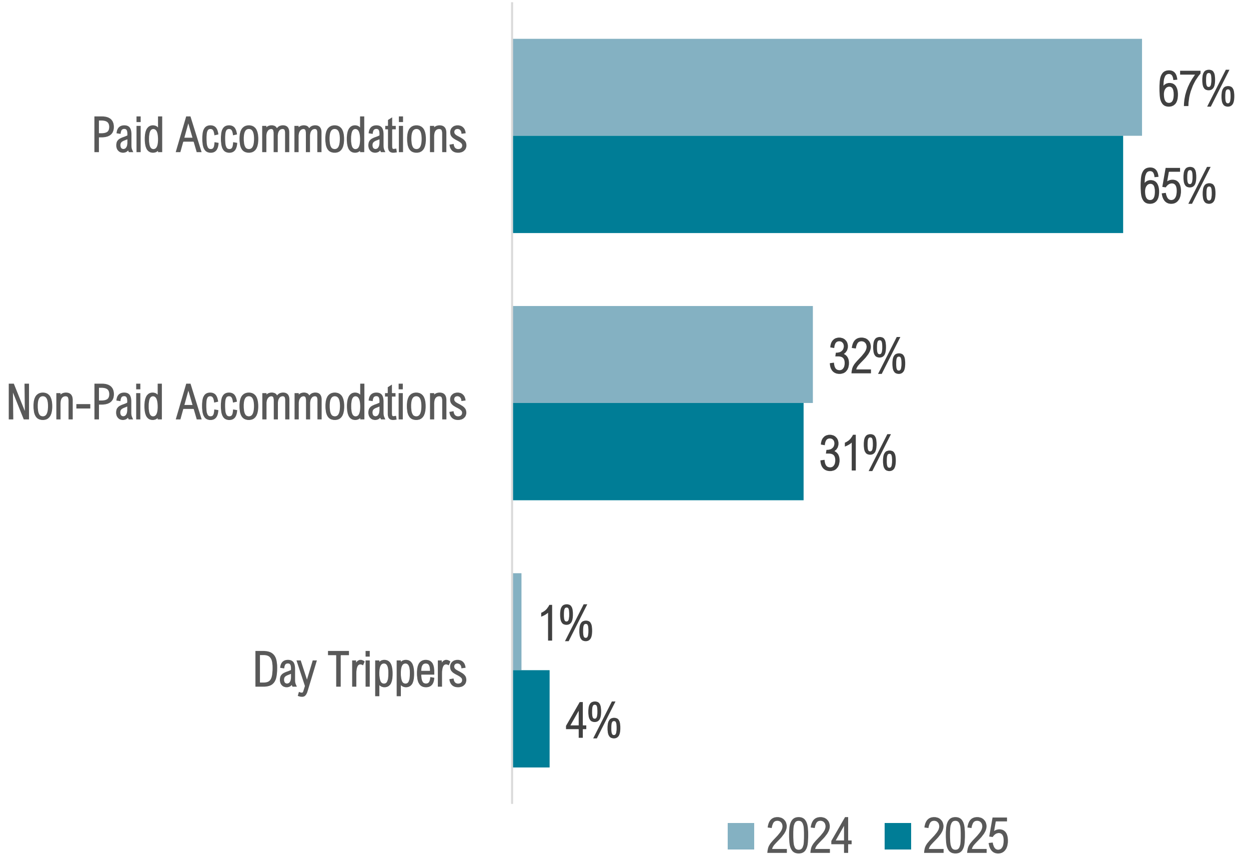
NUMBER OF VISITORS

There were 913,200 visitors to the Fort Myers area in Oct - Dec 2025 (+5.0% from 2024).



VISITOR TYPE

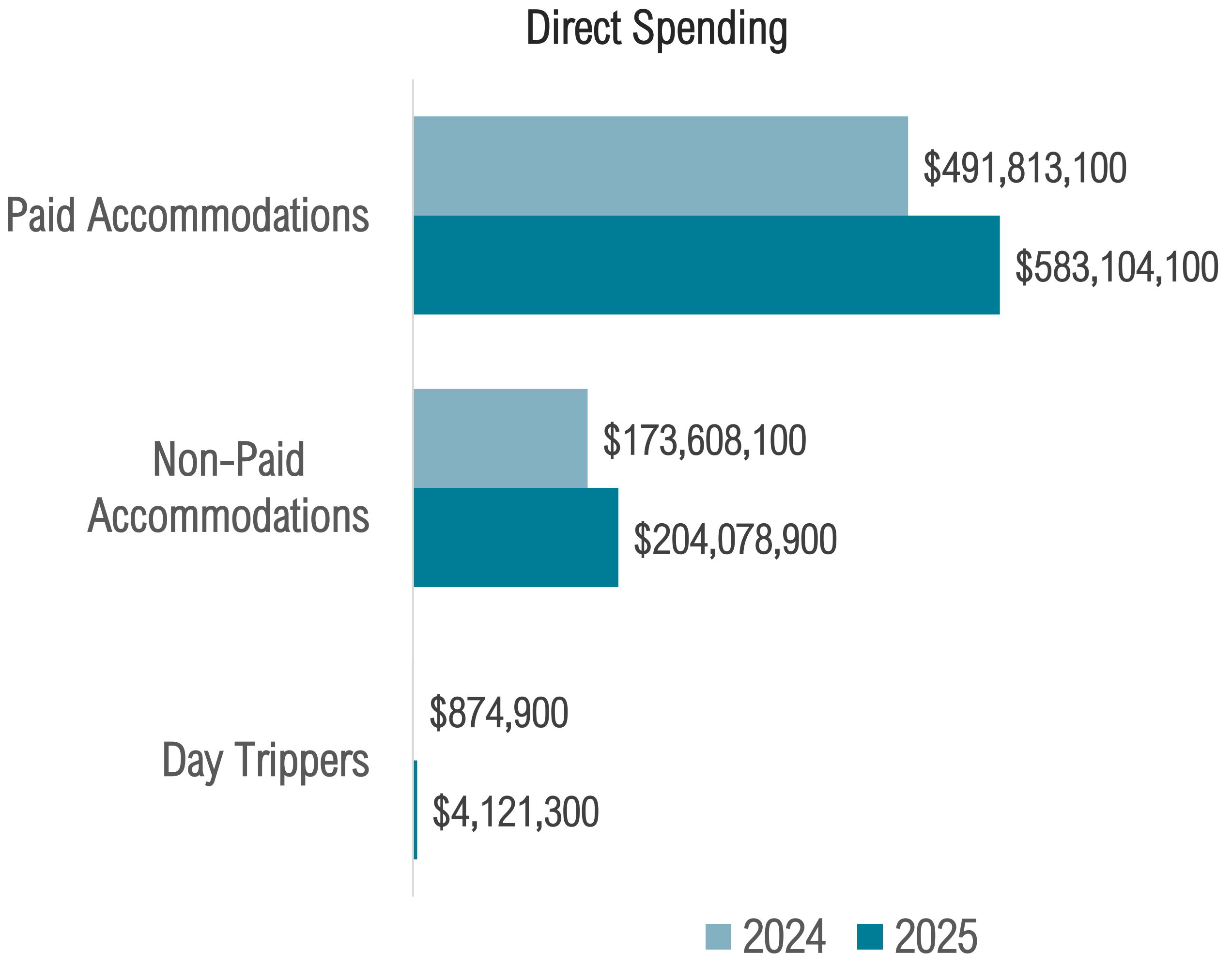
Visitors staying in paid accommodations accounted for **nearly 2 in 3** visitors.



VISITOR EXPENDITURES BY VISITOR TYPE

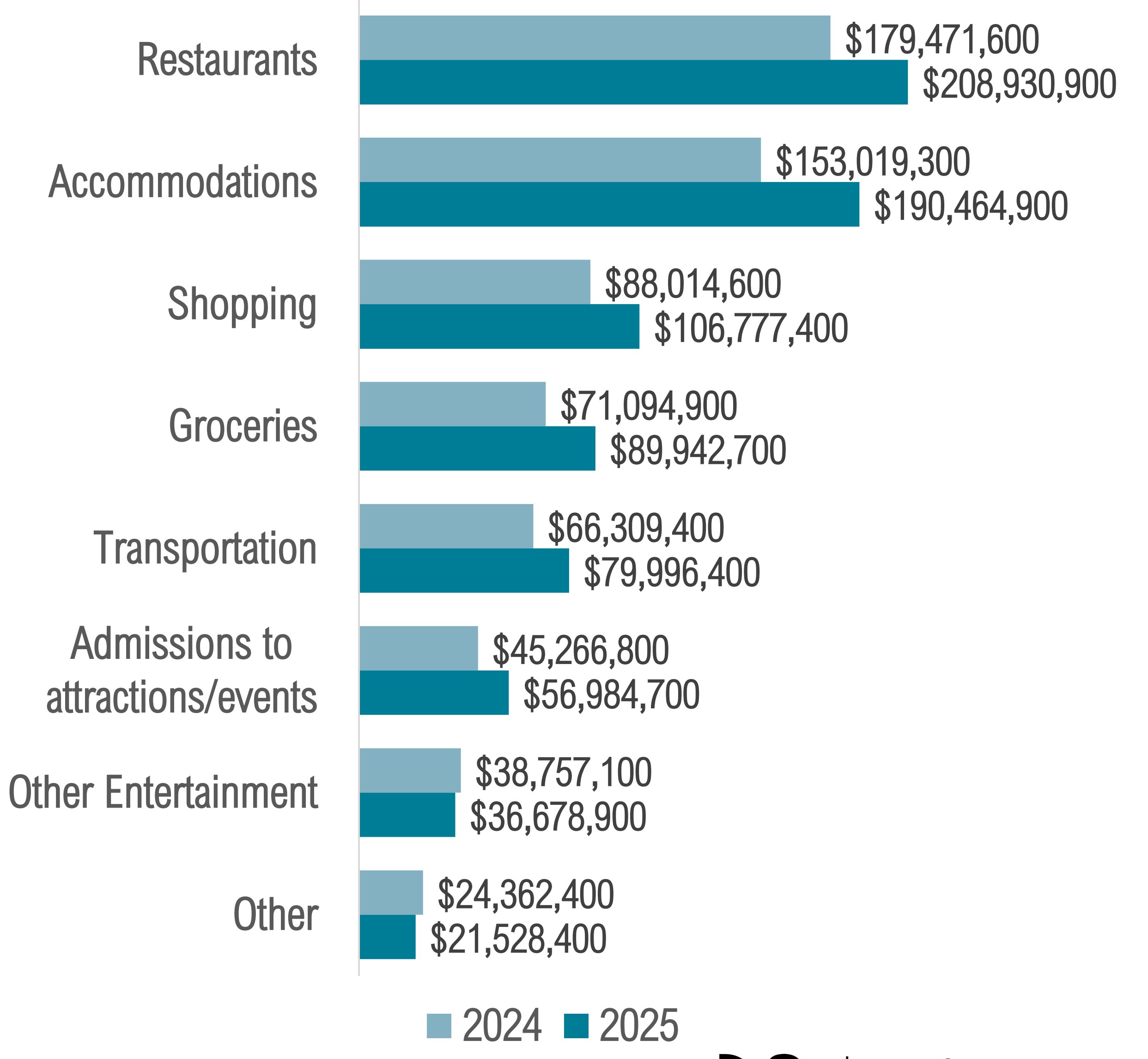
Oct - Dec visitors spent **$791,304,300** in the Fort Myers area, resulting in a total economic impact of **$1,224,787,200**, up 18.6% from 2024.

Visitors staying in paid accommodations accounted for 65% of all visitors and 74% of all spending.



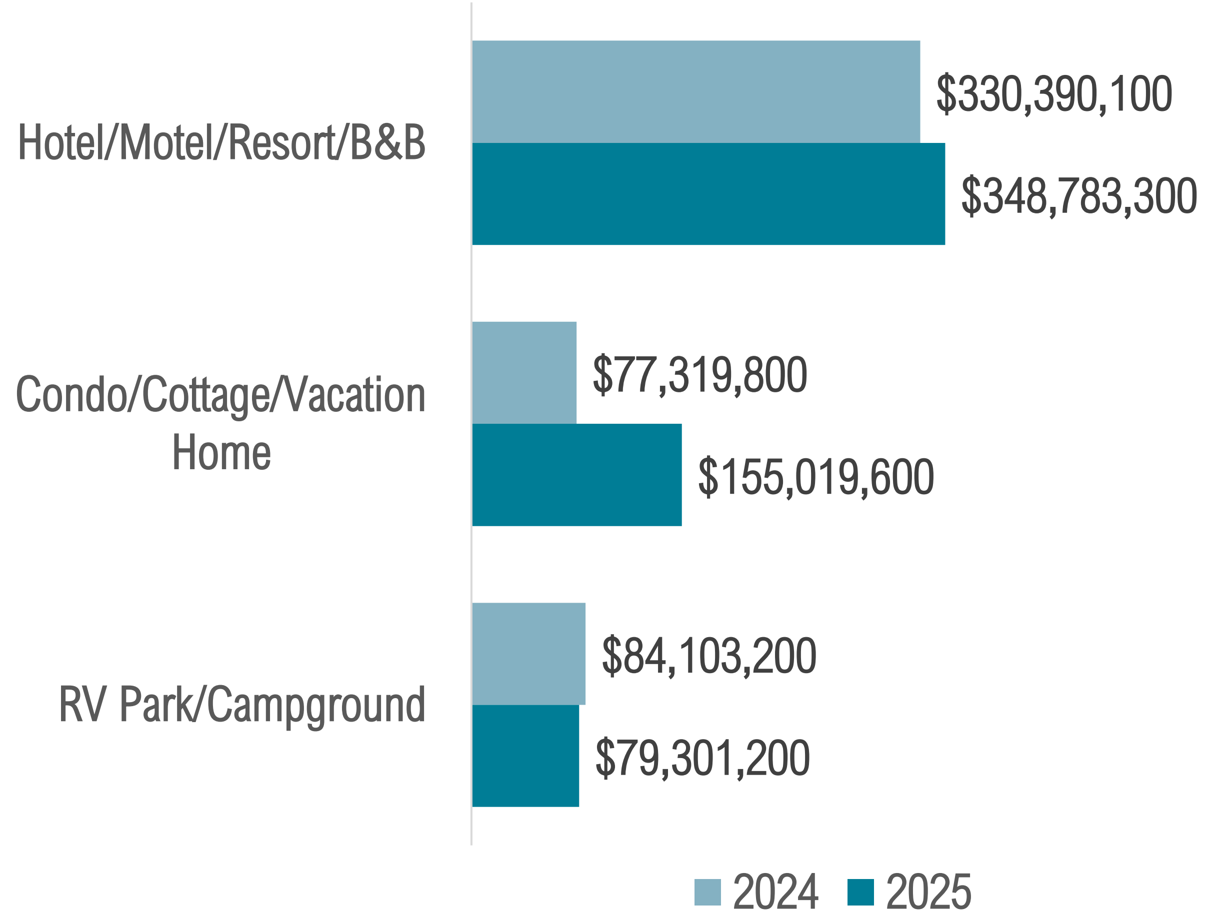
VISITOR EXPENDITURES BY SPENDING CATEGORY[1]

Of the **$791,304,300** visitors spent in the Fort Myers area, 26% was spent on **restaurants** and 24% was spent on **accommodations**, accounting for **half** of **all visitor spending**.



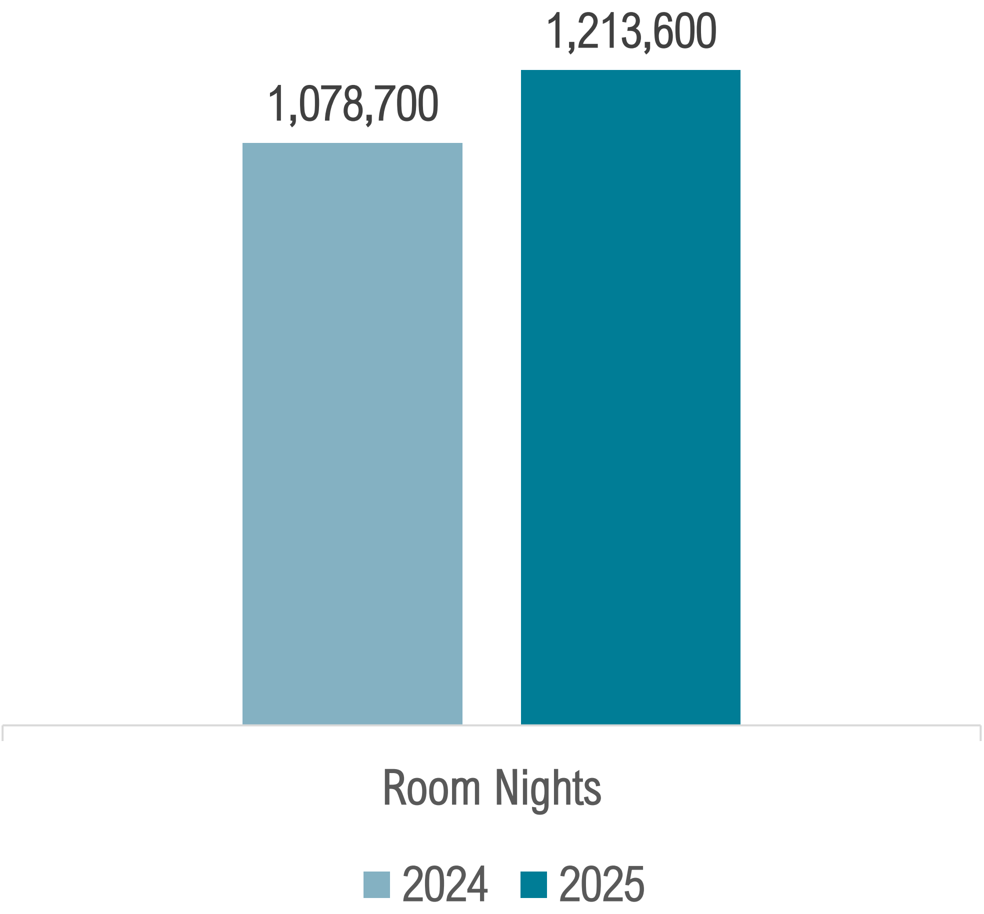
VISITOR EXPENDITURES BY LODGING TYPE

Oct - Dec visitors staying in paid accommodations spent $583,104,100 in the Fort Myers area (+18.6% from 2024).



ROOM NIGHTS GENERATED[1]

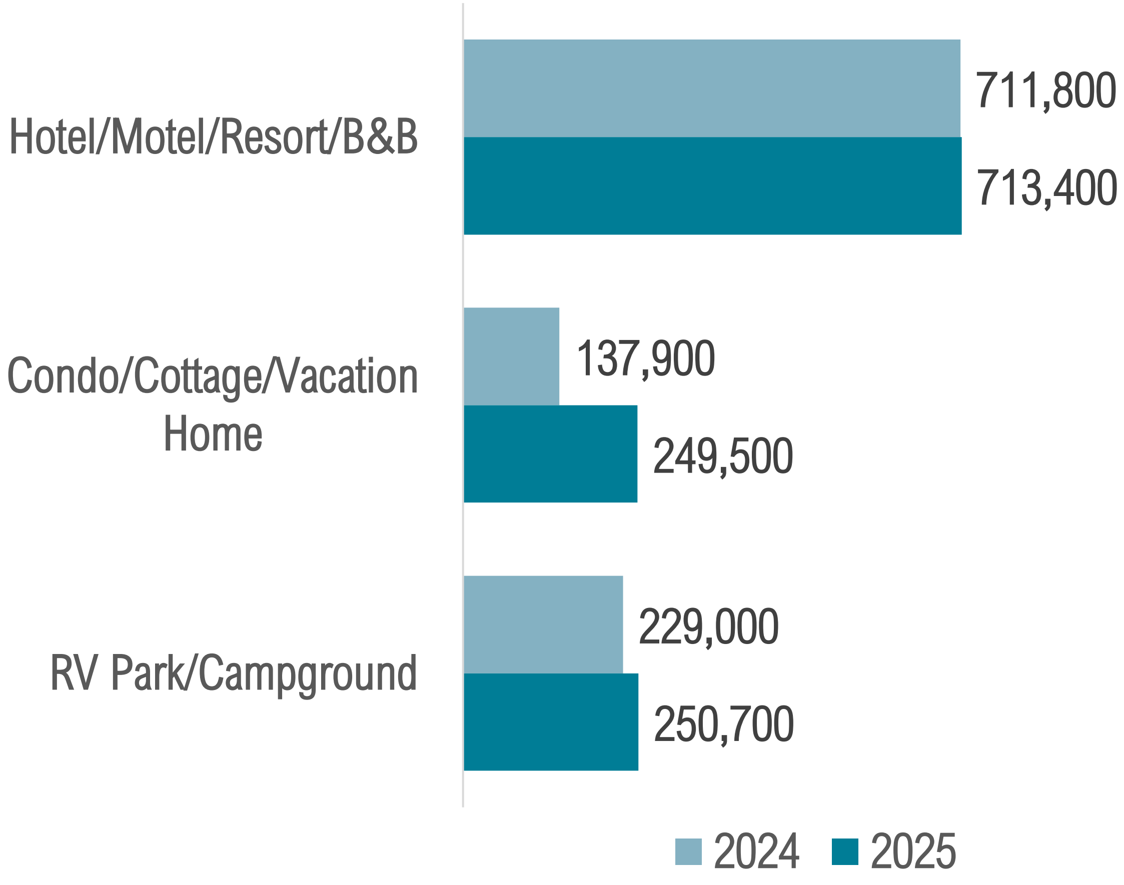
Oct - Dec visitors spent **1,213,600** nights in Fort Myers area hotels, resorts, condos, rental houses, RV parks, etc. (+12.5% from 2024).



[1]Sources: DBPR, DSG Occupancy Study, Smith Travel Research, and KeyData

ROOM NIGHTS GENERATED[1]

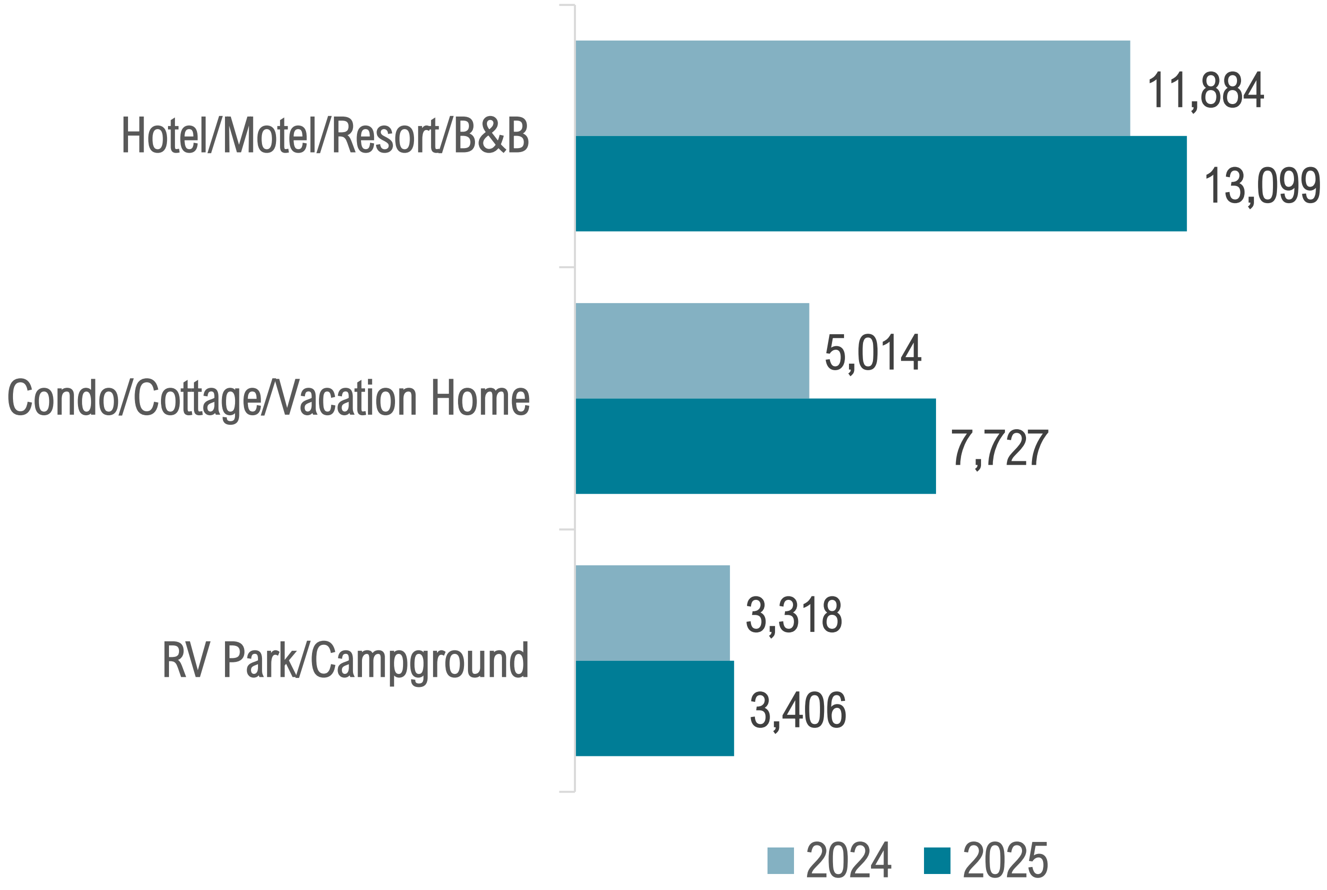
Hotels, motels, etc. accounted for 59% of room nights spent in the Fort Myers area, while vacation rentals accounted for 20% of room nights and RV parks/campgrounds accounted for the remaining 21% of nights that visitors spent in the area.



[1]Sources: DBPR, DSG Occupancy Study, Smith Travel Research, and KeyData

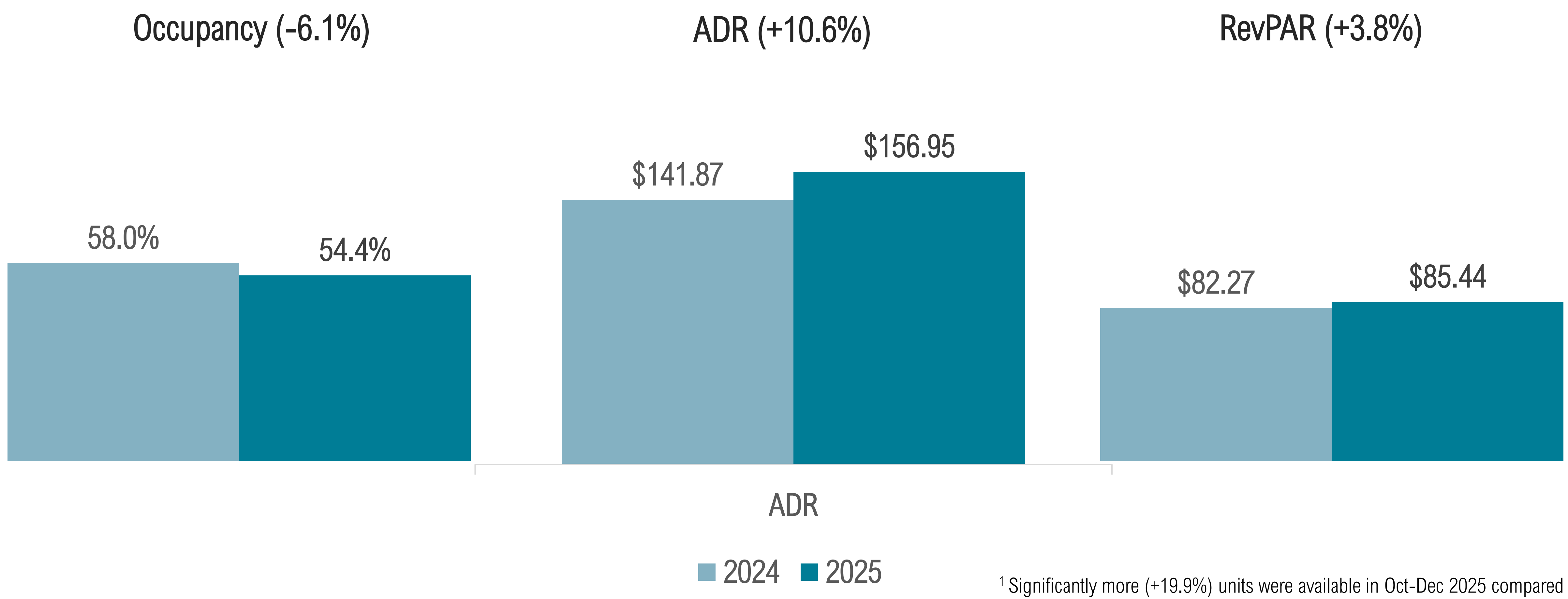
AVAILABLE UNITS[1]

There were **24,232** available units in Oct - Dec 2025 vs. 20,384 in 2024 (+19.9%). **Over half** of the units available were from hotels, motels, etc.



[1]Sources: DBPR, DSG Occupancy Study, Smith Travel Research, and KeyData

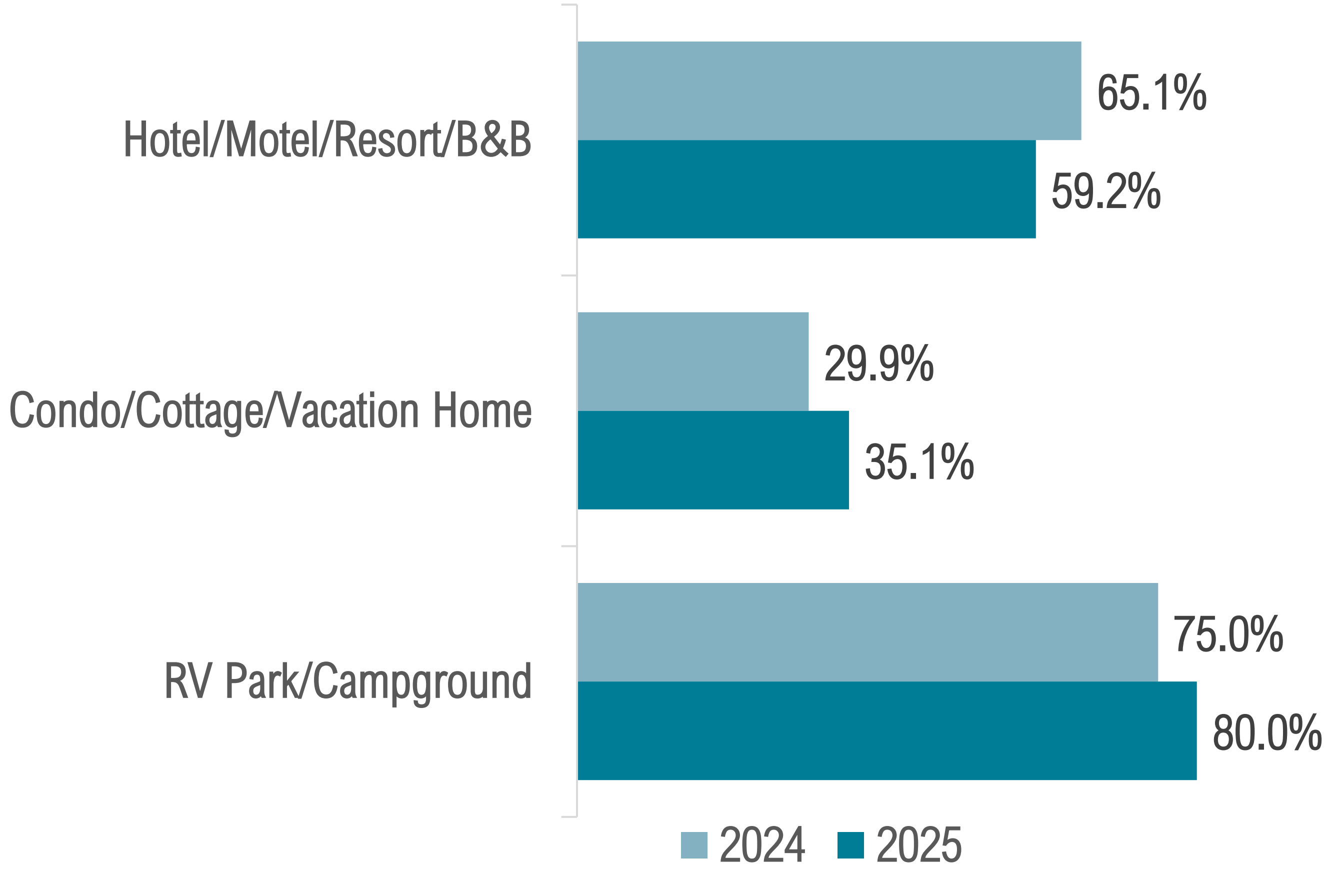
OCCUPANCY[1], ADR AND REVPAR[2]



[1] Significantly more (+19.9%) units were available in Oct-Dec 2025 compared to Oct-Dec 2024. This is due to the ongoing recovery process post-Hurricane Ian.
[2]Sources: DBPR, DSG Occupancy Study, Smith Travel Research, and KeyData

OCCUPANCY[1,2]

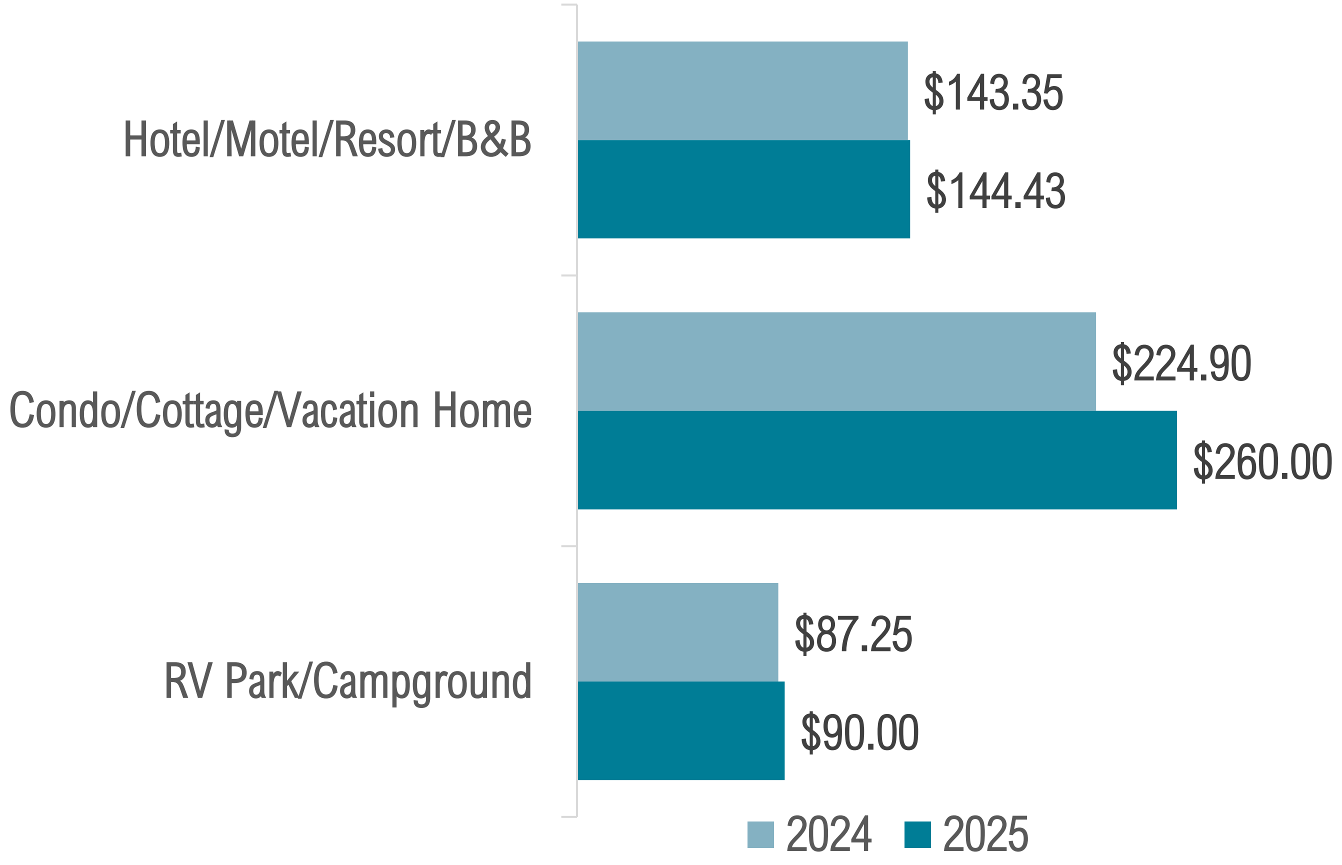
Average occupancy in Oct - Dec was **54.4%** (58.0% in 2024).



[1] Significantly more (+19.9%) units were available in Oct-Dec 2025 compared to Oct-Dec 2024. This is due to the ongoing recovery process post-Hurricane Ian.
[2]Sources: DBPR, DSG Occupancy Study, Smith Travel Research, and KeyData

ADR[1]

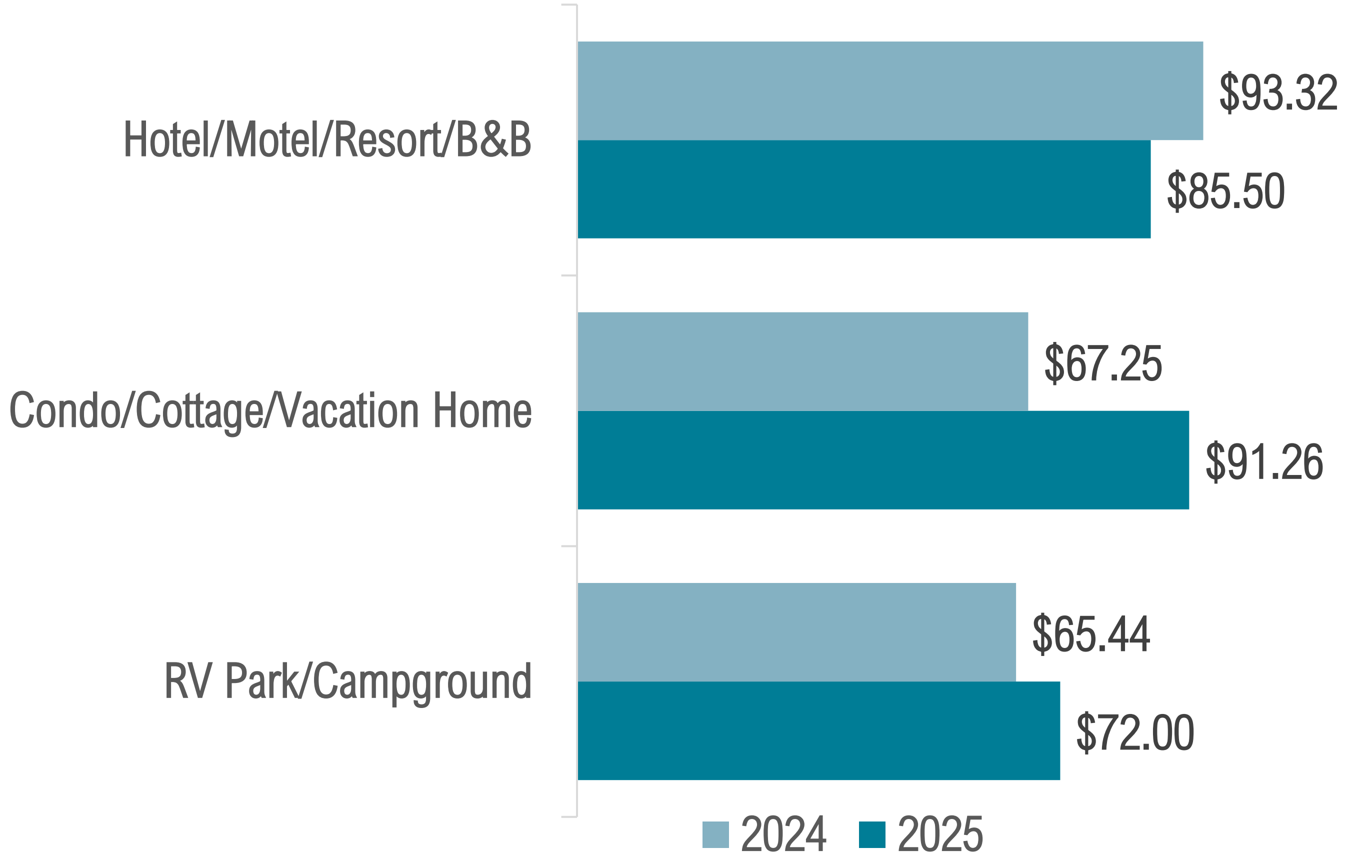
ADR in Oct - Dec was **$144.43** ($143.35 in 2024).



[1]Sources: DBPR, DSG Occupancy Study, Smith Travel Research, and KeyData

REVPAR[1]

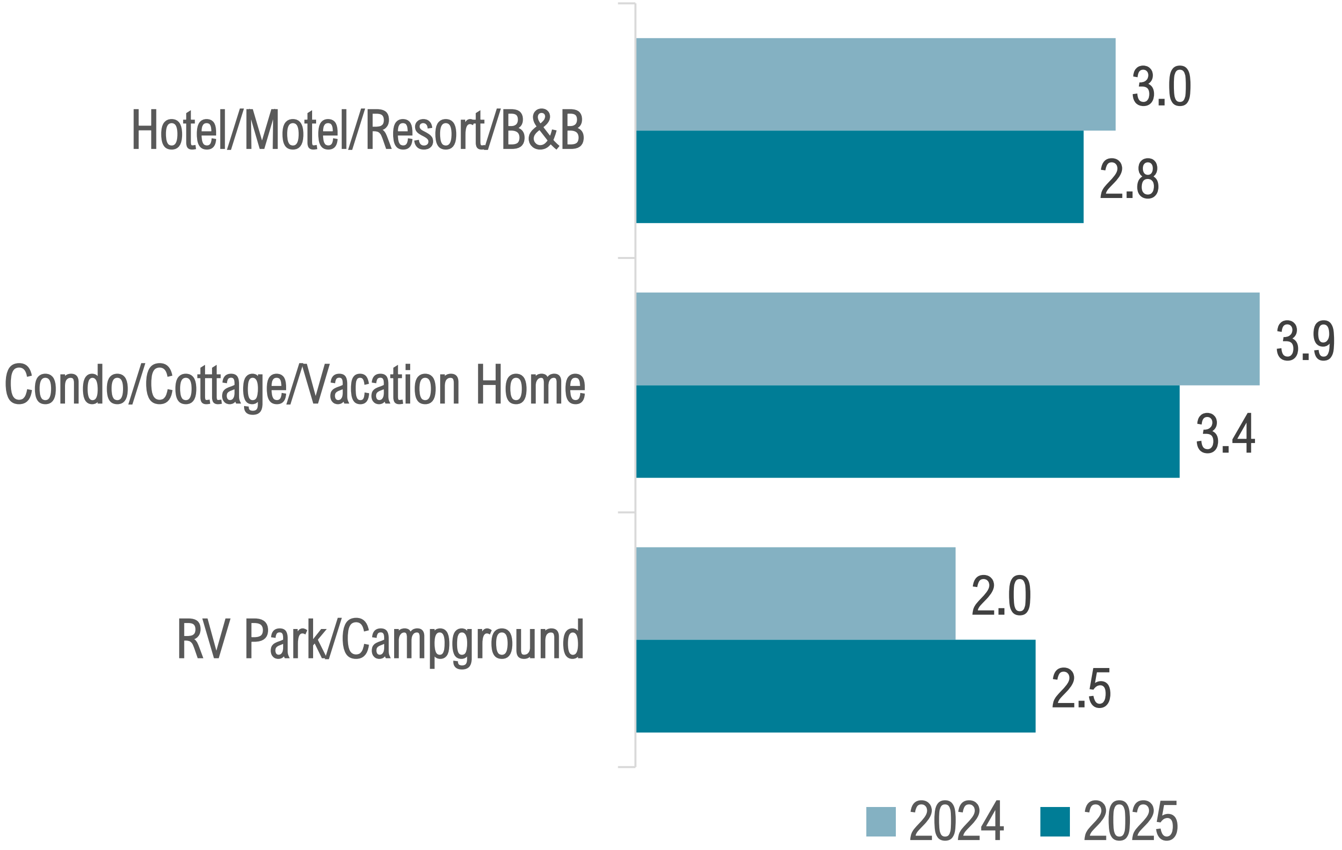
Average RevPAR in Oct - Dec was $85.44 ($82.27 in 2024).



[1]Sources: DBPR, DSG Occupancy Study, Smith Travel Research, and KeyData

TRAVEL PARTY SIZE[1]

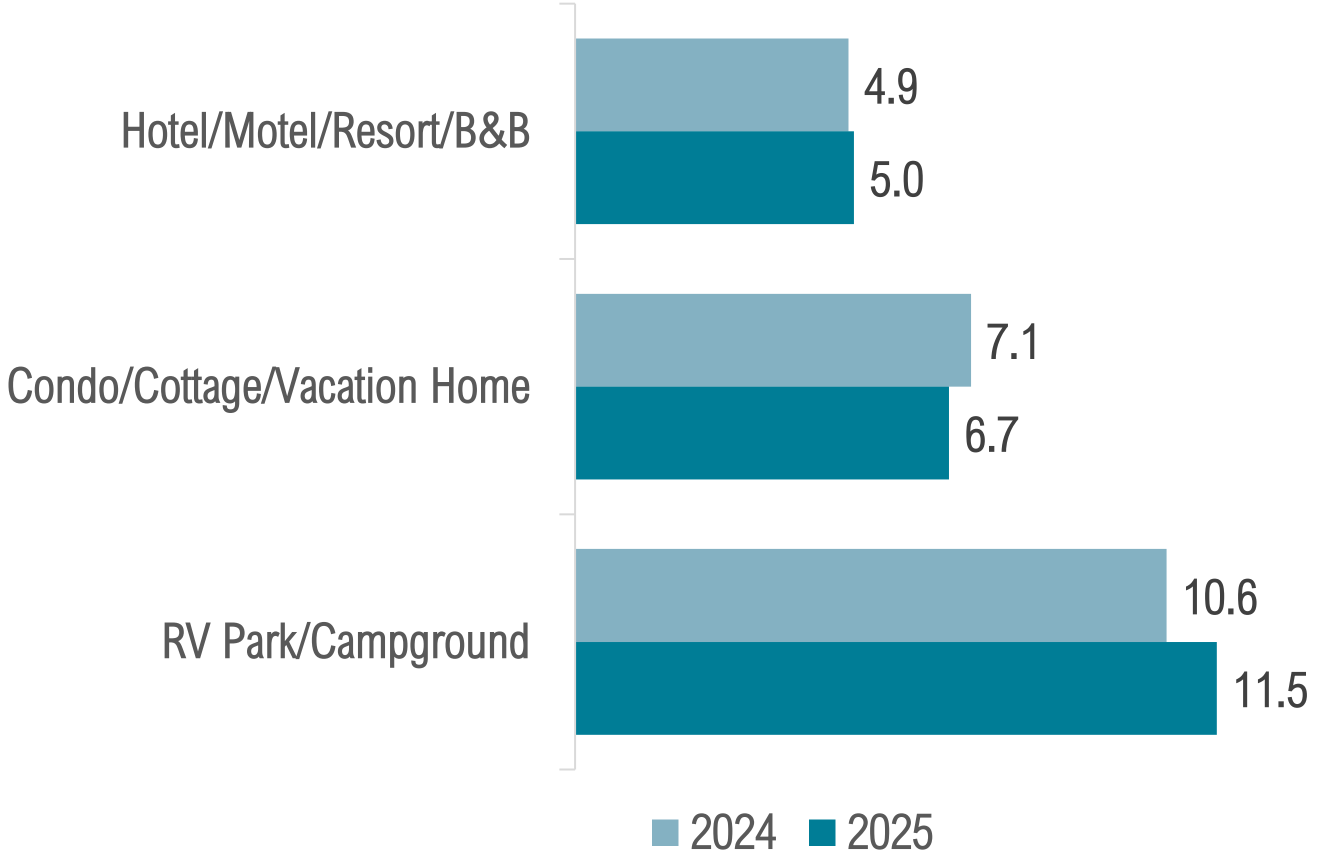
For visitors in paid accommodations, average travel party size in Oct - Dec was **2.9 people** (3.0 people in 2024).



[1]Sources: DBPR, DSG Occupancy Study, Smith Travel Research, and KeyData

LENGTH OF STAY[1]

For visitors in paid accommodations, average length of stay in Oct - Dec was **5.2 nights** (5.7 nights in 2024).



[1]Sources: DBPR, DSG Occupancy Study, Smith Travel Research, and KeyData

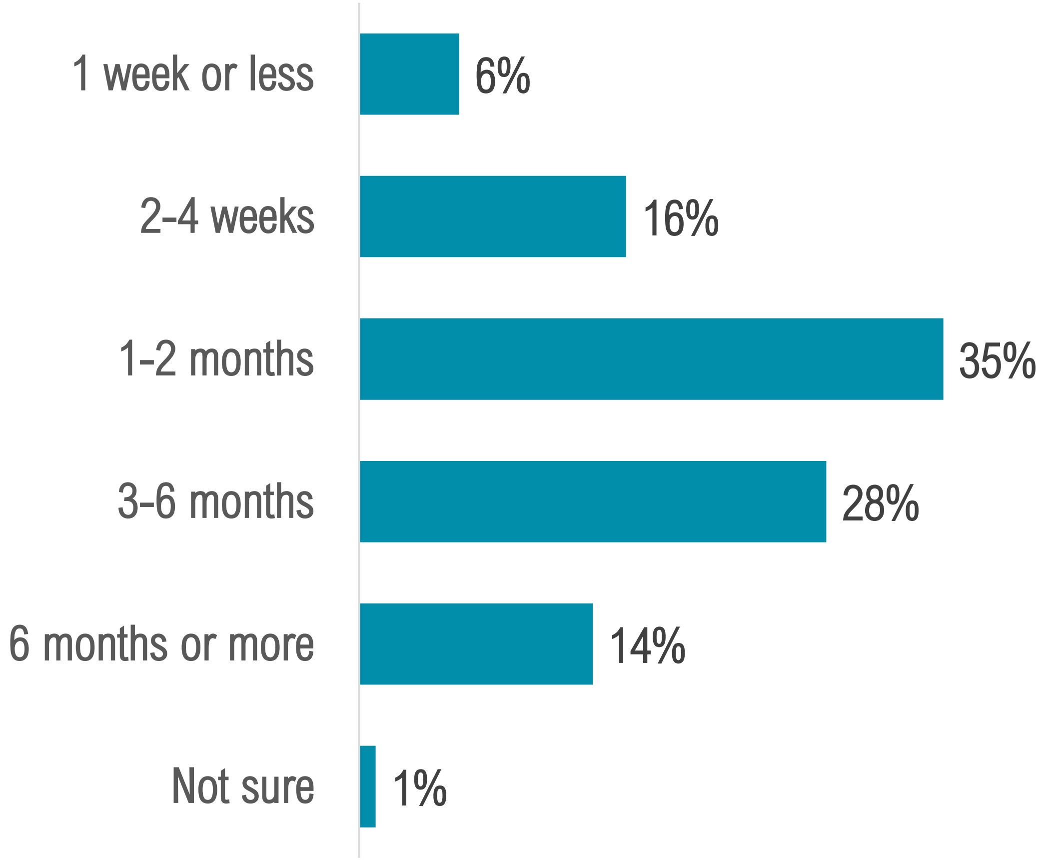
Visitor Journey: Pre-Visit

- **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 **nearly 3 in 10** visitors planned their trip **3-6 months** in advance.

The **average trip planning cycle** lasted **nearly 2 months** (54 days).

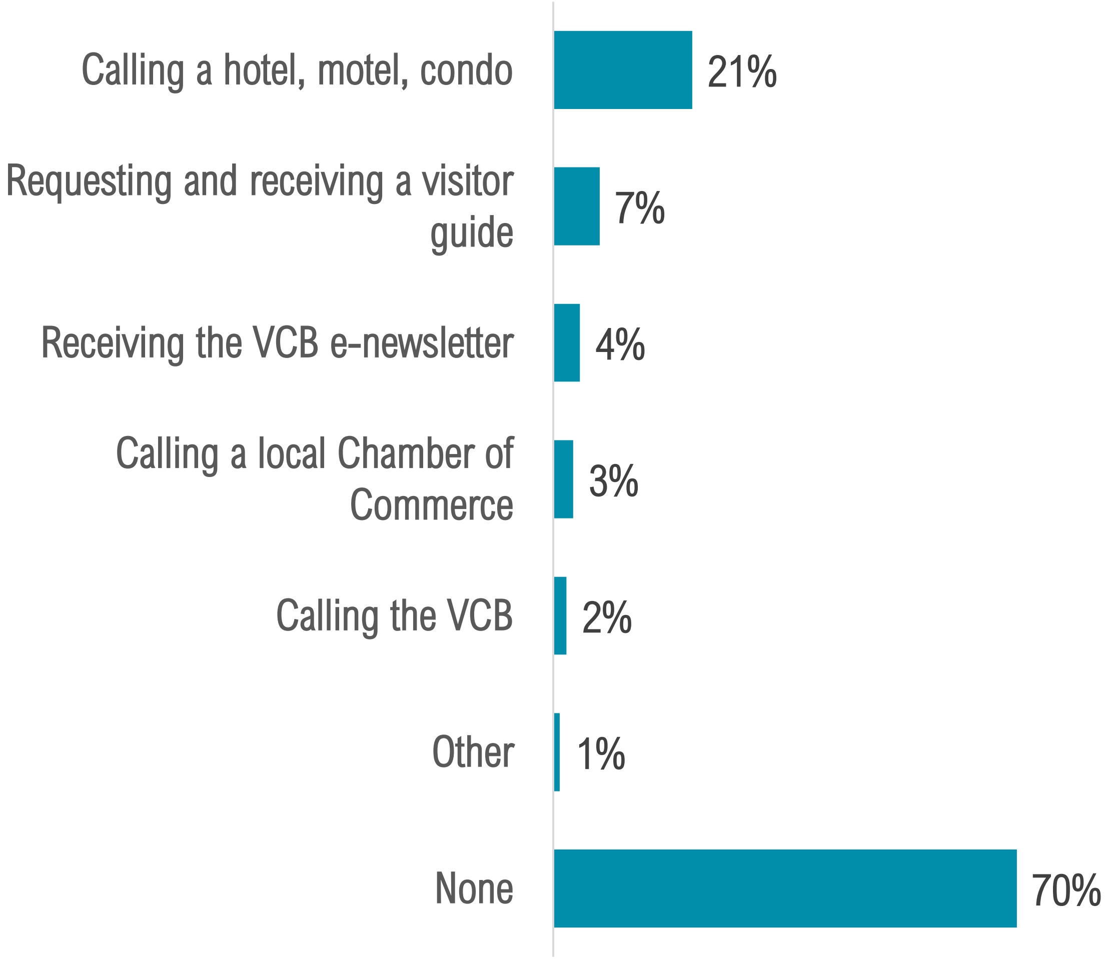


TRIP PLANNING: INFORMATION REQUESTS[1]

3 in 10 visitors made **information requests** while planning their trip to the Fort Myers area.

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

The share of visitors requesting information in Q4 2025 decreased slightly from Q4 2024 (from 32% to 30%).



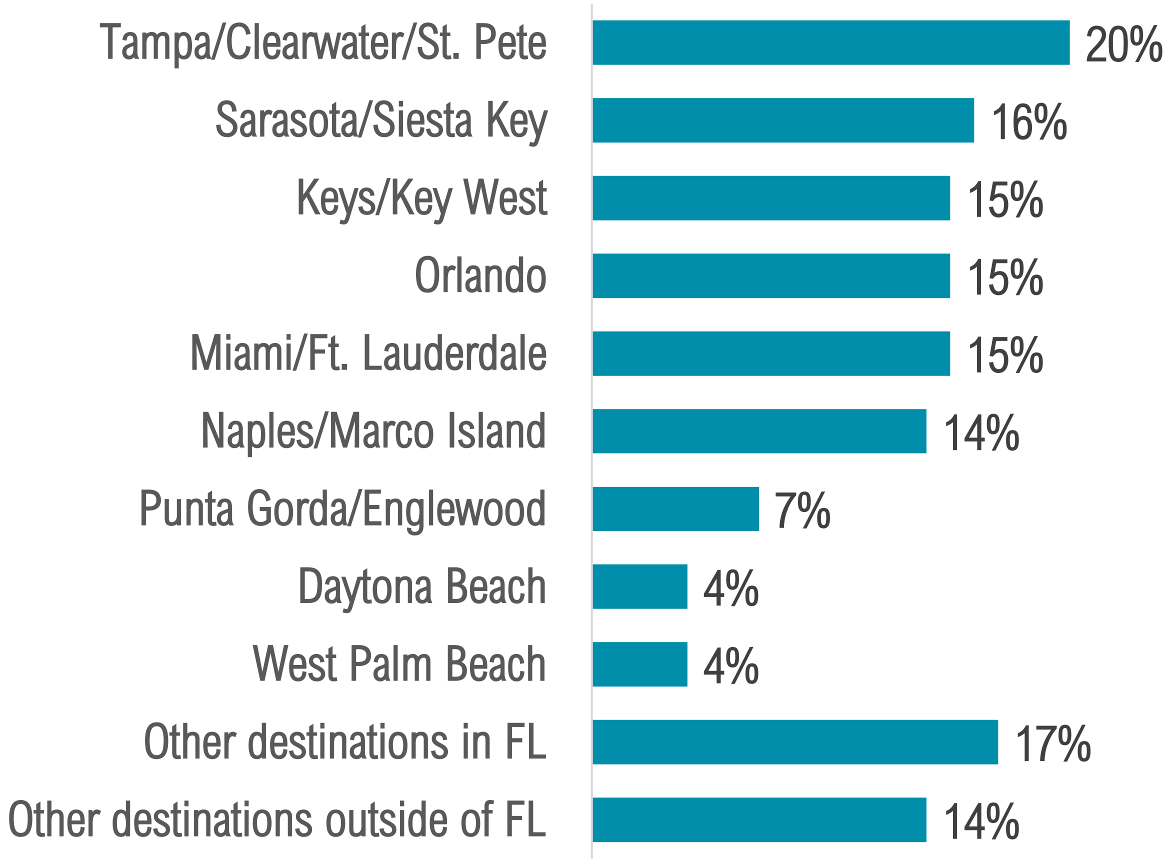
[1]Multiple responses permitted.

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: 19% of visitors who considered other destinations



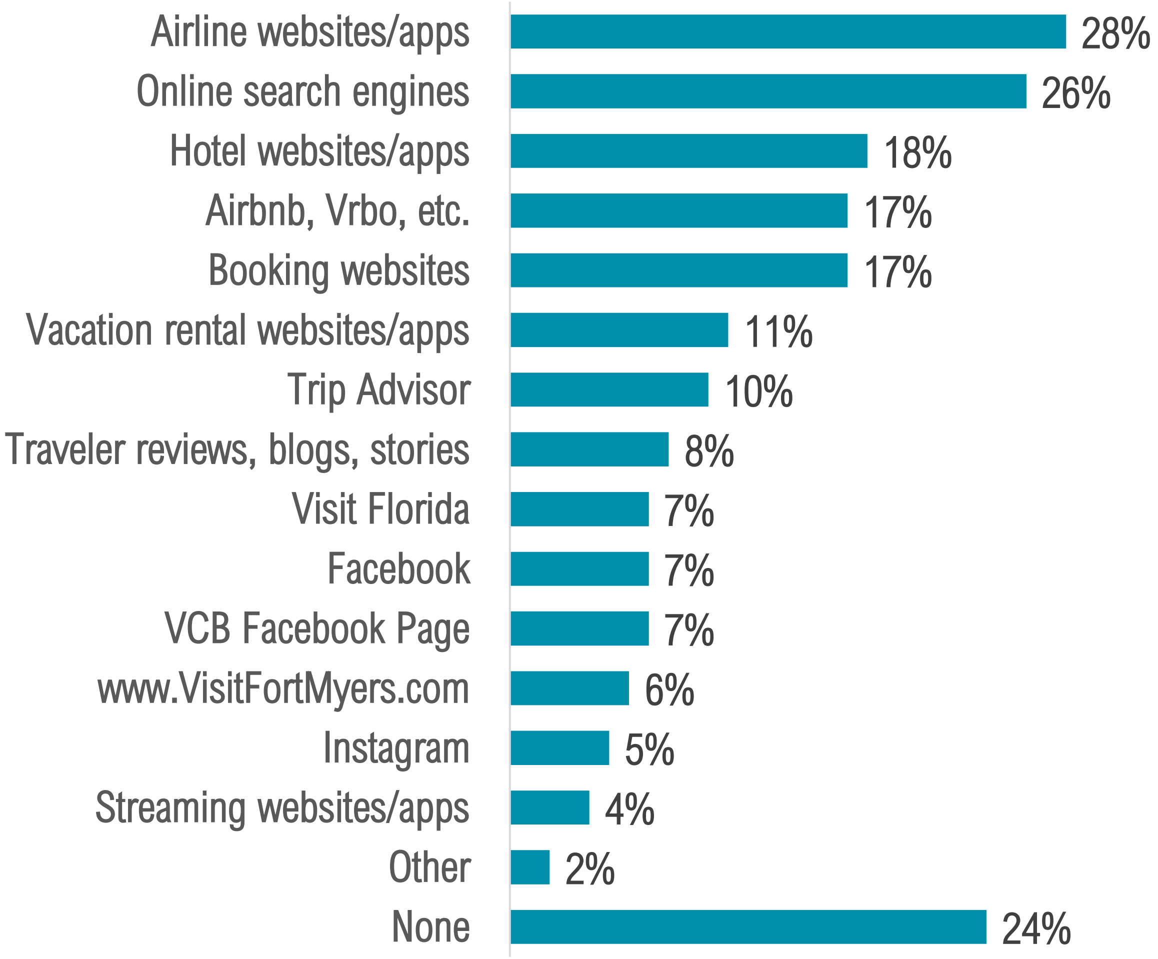
[1]Multiple responses permitted.

TRIP PLANNING: WEBSITES/APPS USED[1]

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

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

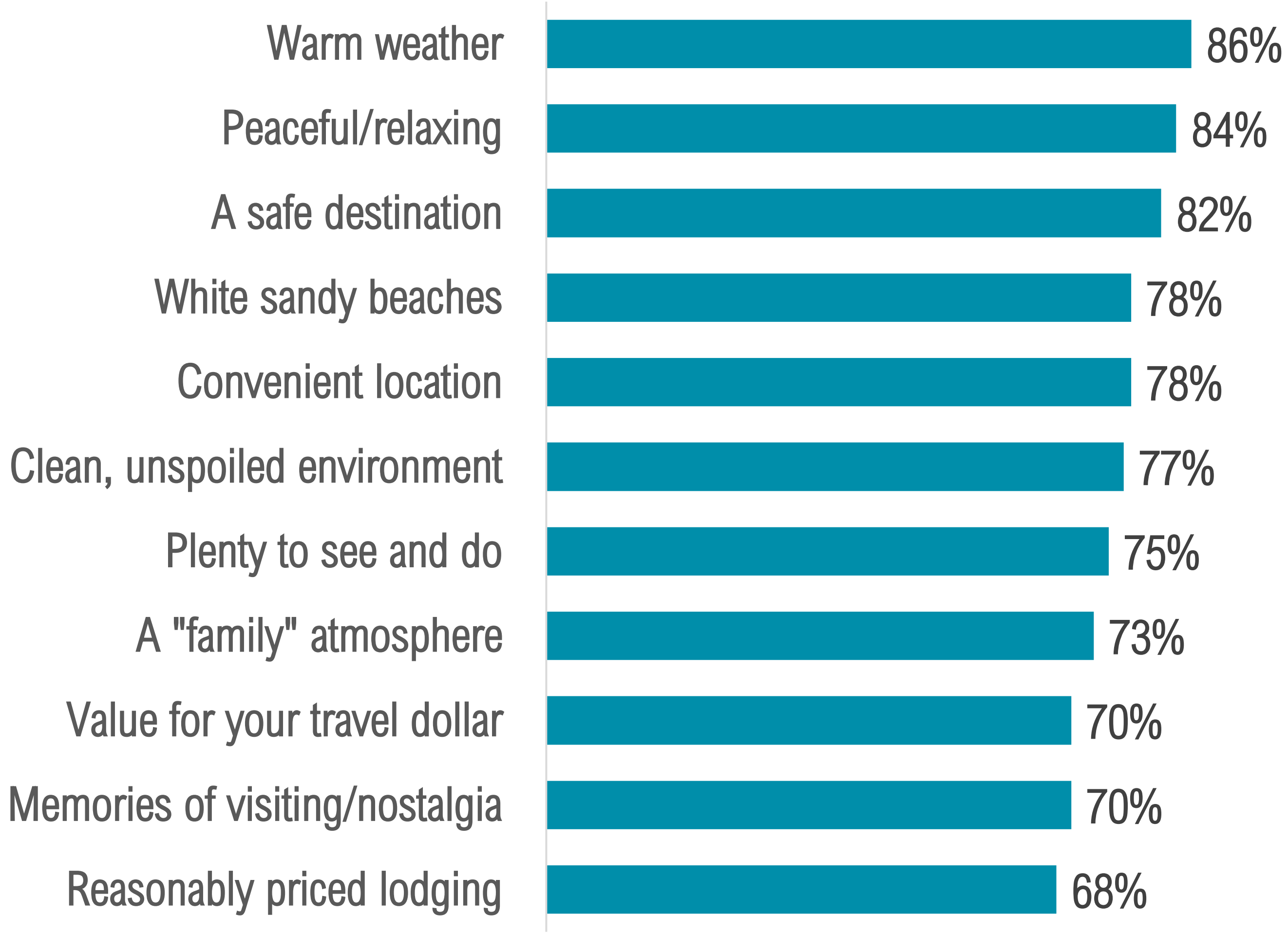
Nearly 1 in 5 visitors used either **hotel websites/apps**, **booking websites**, or **Airbnb/Vrbo** to plan their trips.



[1]Multiple responses permitted.

TRIP INFLUENCERS[1]

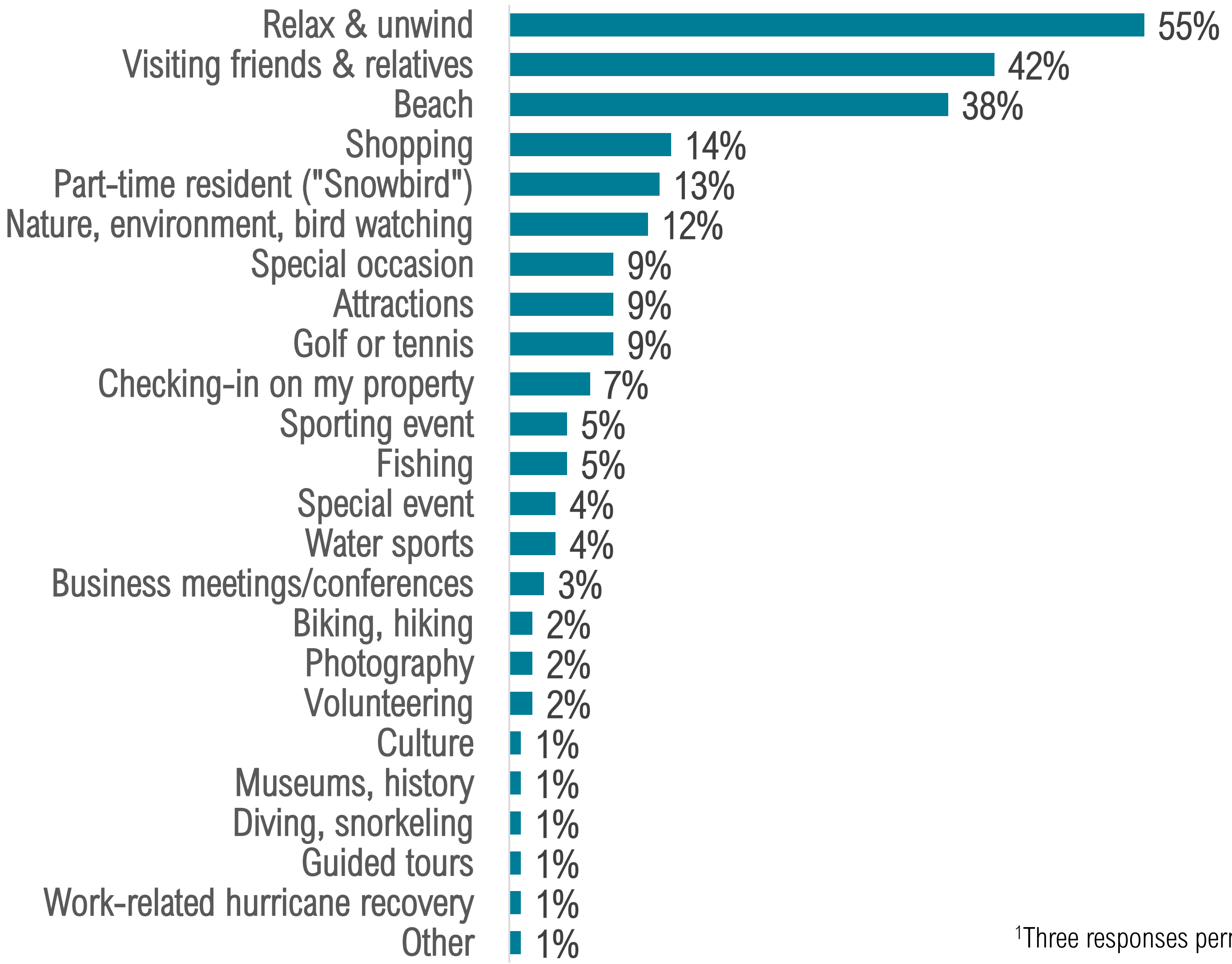
Visitors were heavily influenced by the **warm weather, peacefulness, and safety** of the Fort Myers area when thinking about visiting.



[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]

Relaxation, visiting friends & relatives, and the beach were the dominant motivators for travel to the area, with nearly 2 in 5 or more visitors citing each as a main reason for visiting.



Pre-Visit
Oct – Dec 2025

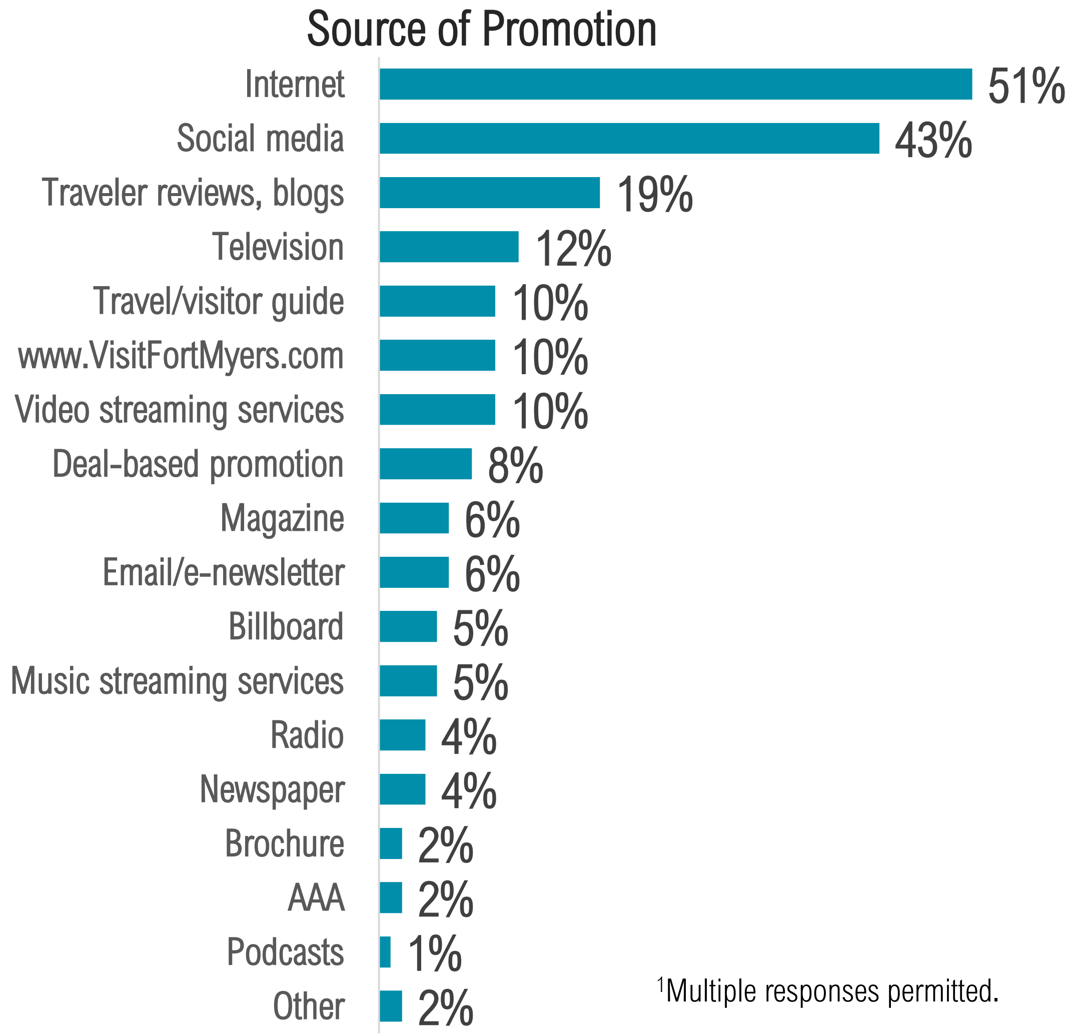
[1]Three responses permitted.

PROMOTIONS RECALL[1]

39% of visitors **recalled promotions** in the past 6 months for the Fort Myers area.

This influenced **25%** of all visitors to come to the Fort Myers area.

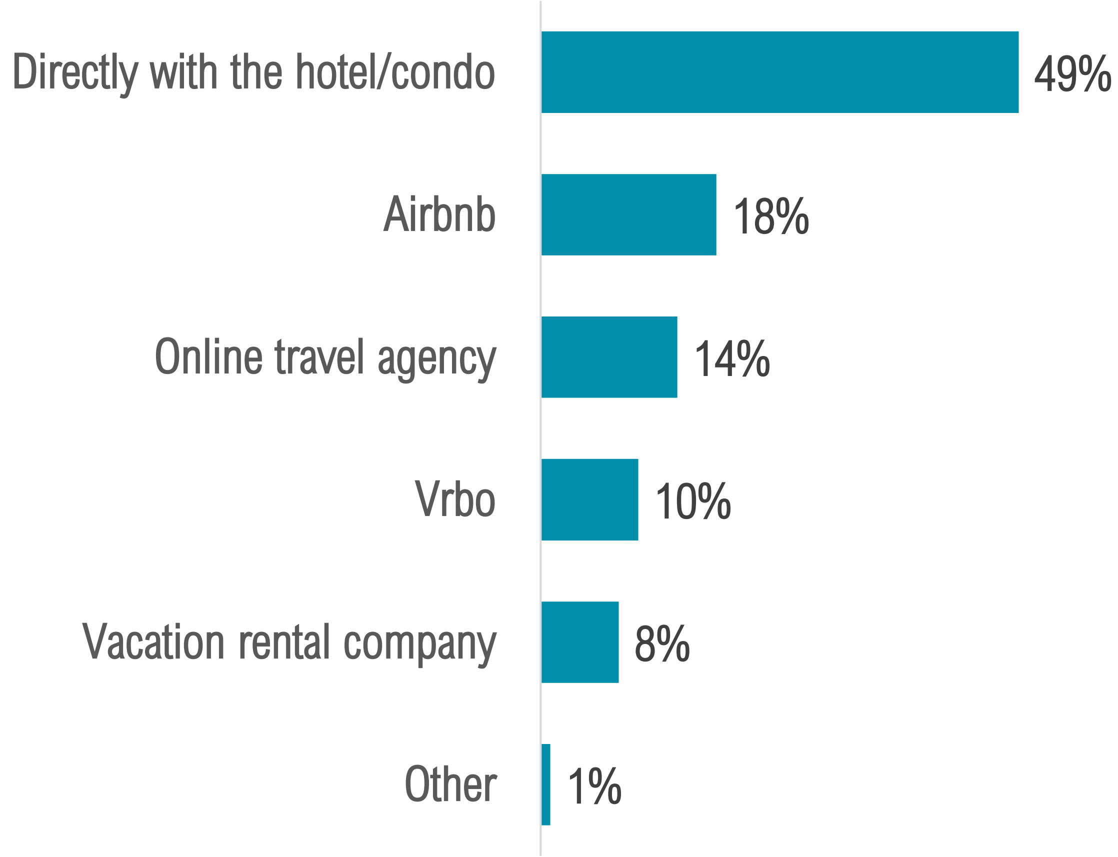
BASE: 39% of visitors who recalled promotions



[1]Multiple responses permitted.

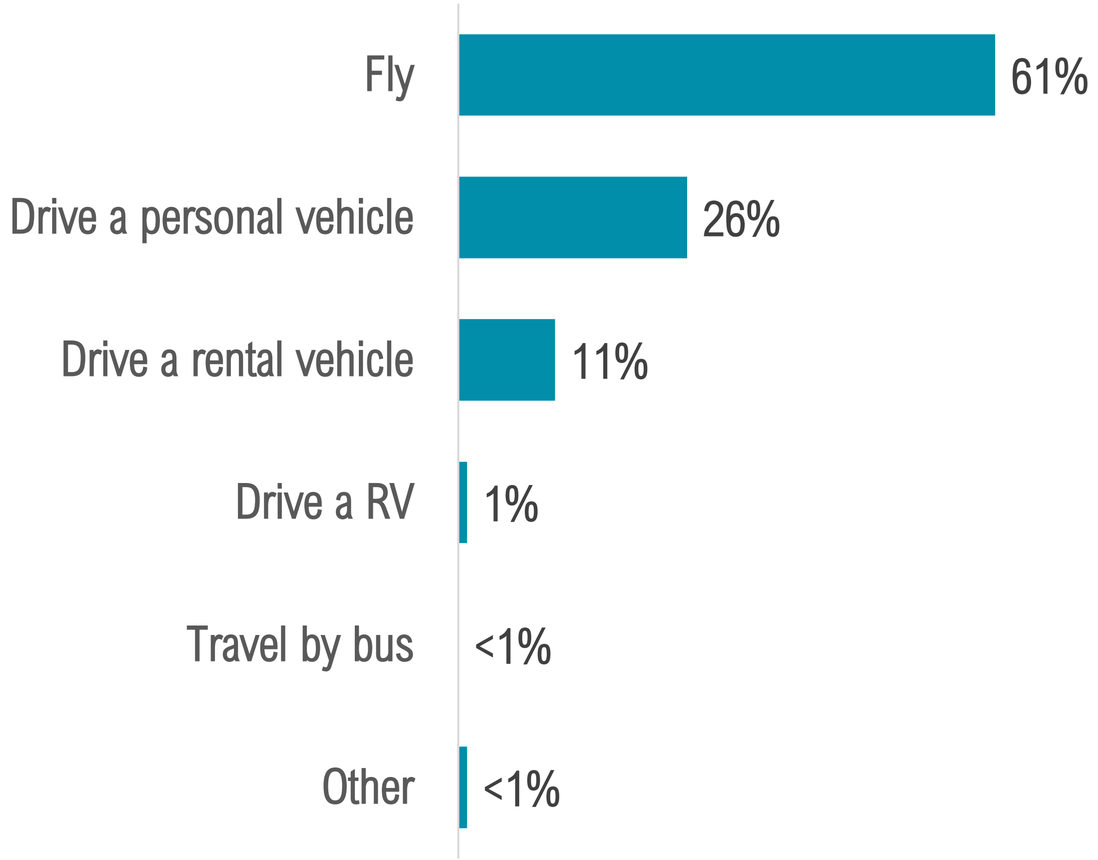
BOOKING

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



TRANSPORTATION

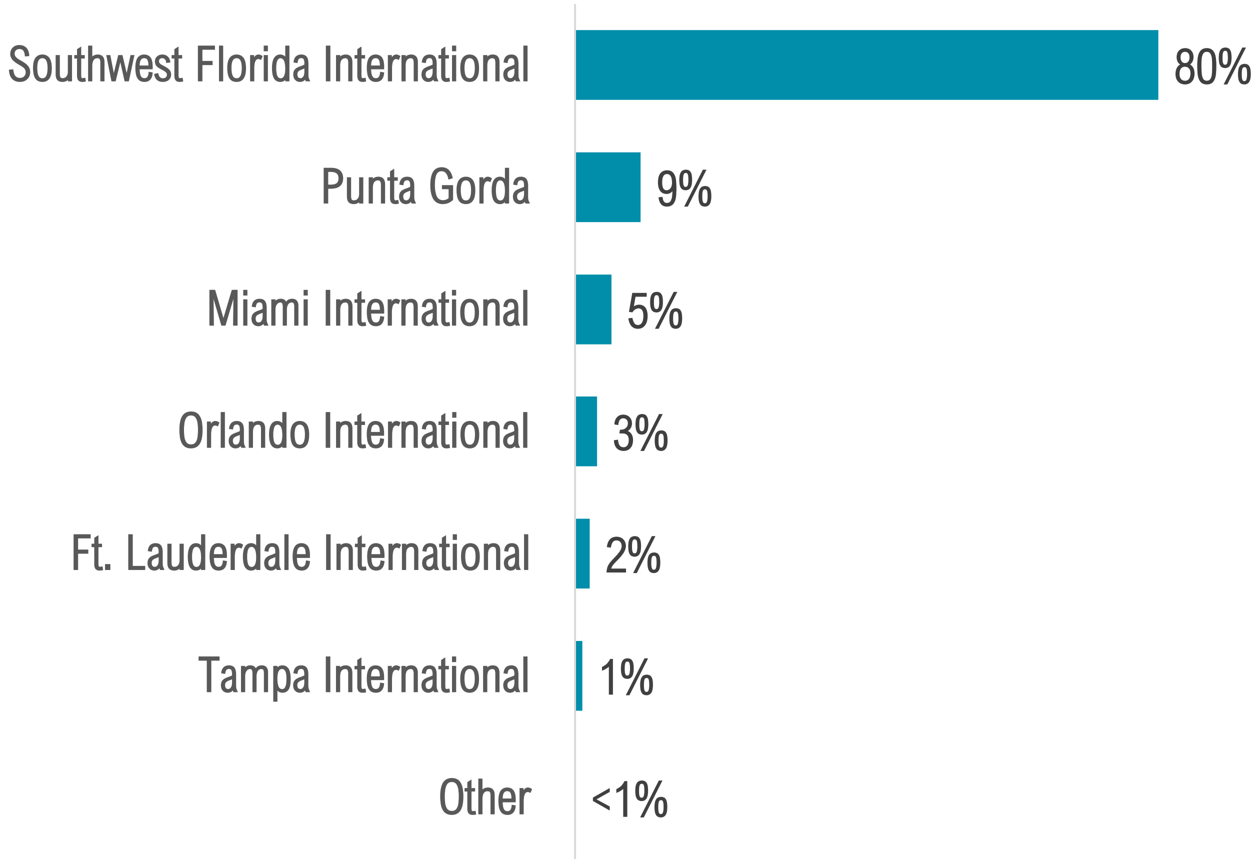
Over 3 in 5 visitors **flew** to the Fort Myers area.



AIRPORT

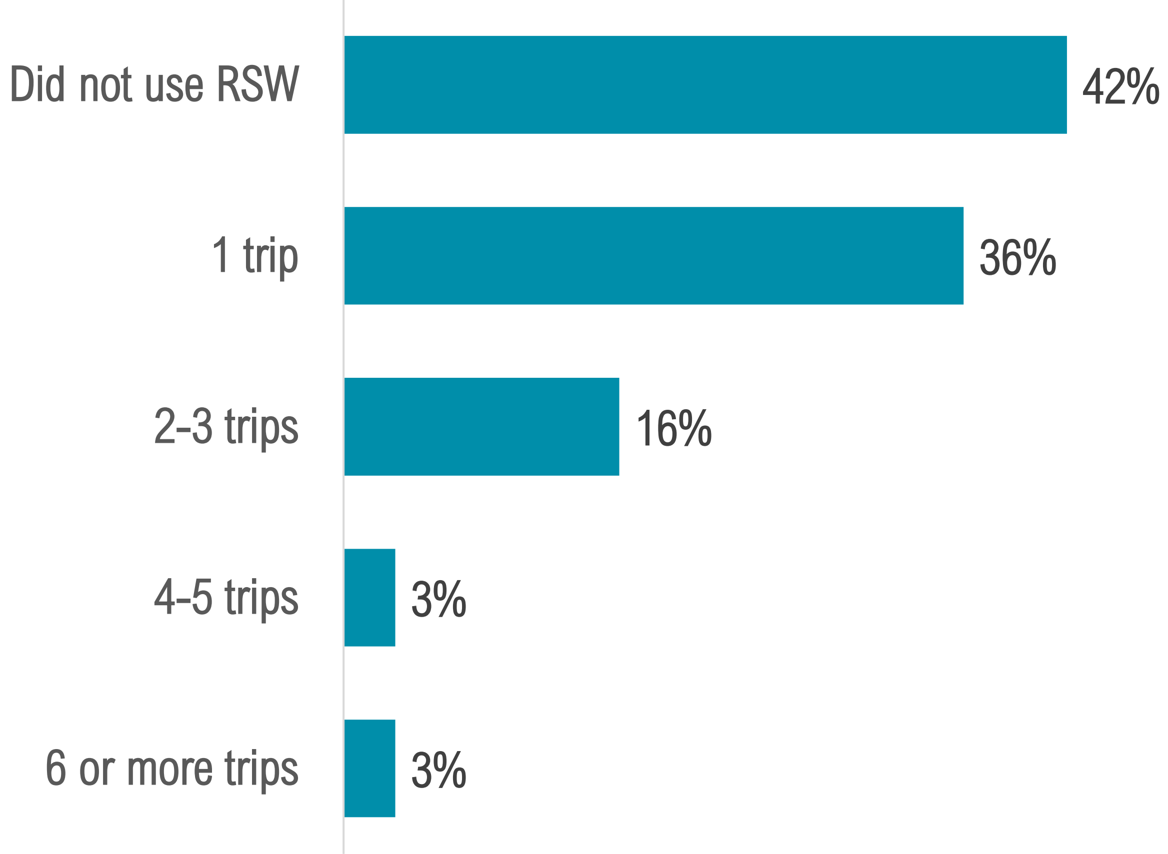
4 in 5 visitors who flew to the Fort Myers area came through **RSW**.

BASE: 61% of visitors who flew



USE OF RSW IN THE PAST YEAR

58% of visitors used RSW **at least once** in the past year.



VISITOR JOURNEY: TRAVEL PARTY PROFILE

Pre-Visit

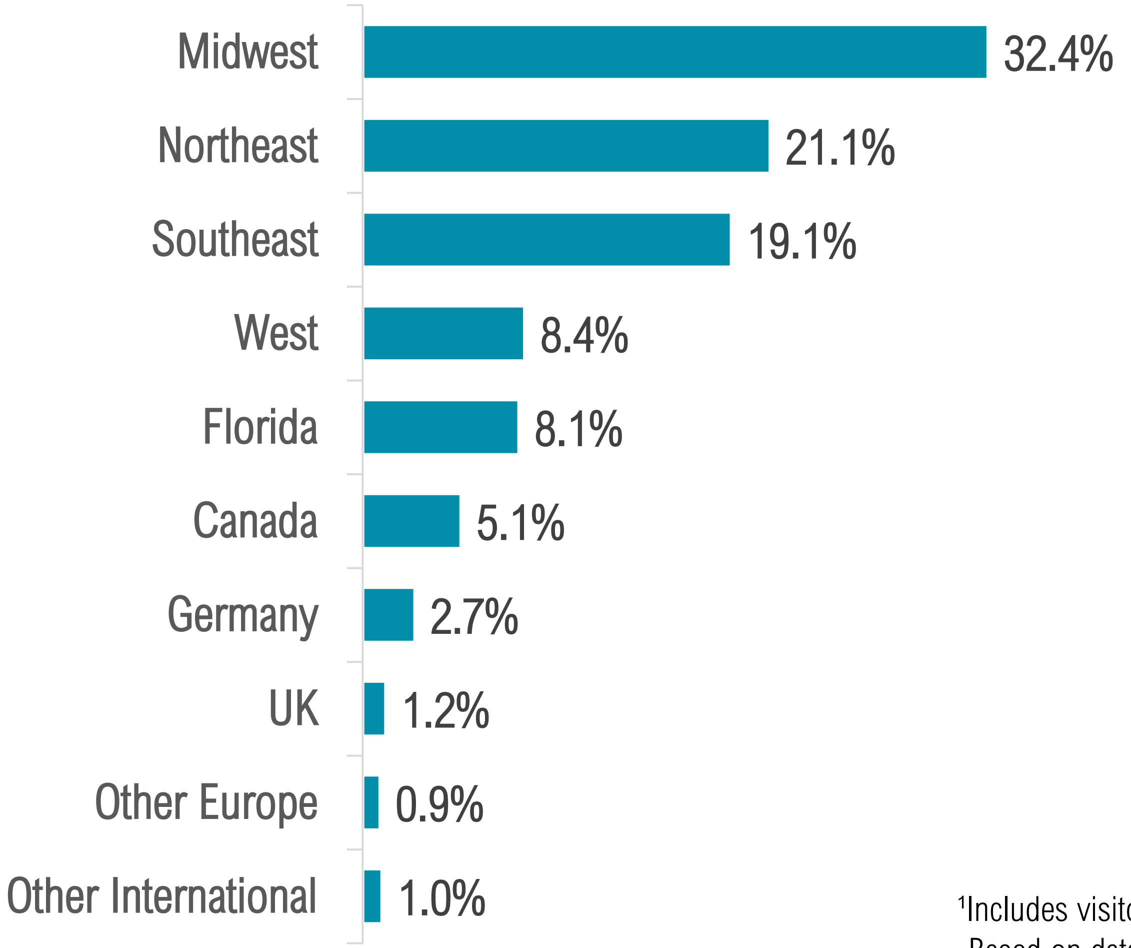
Travel Party Profile

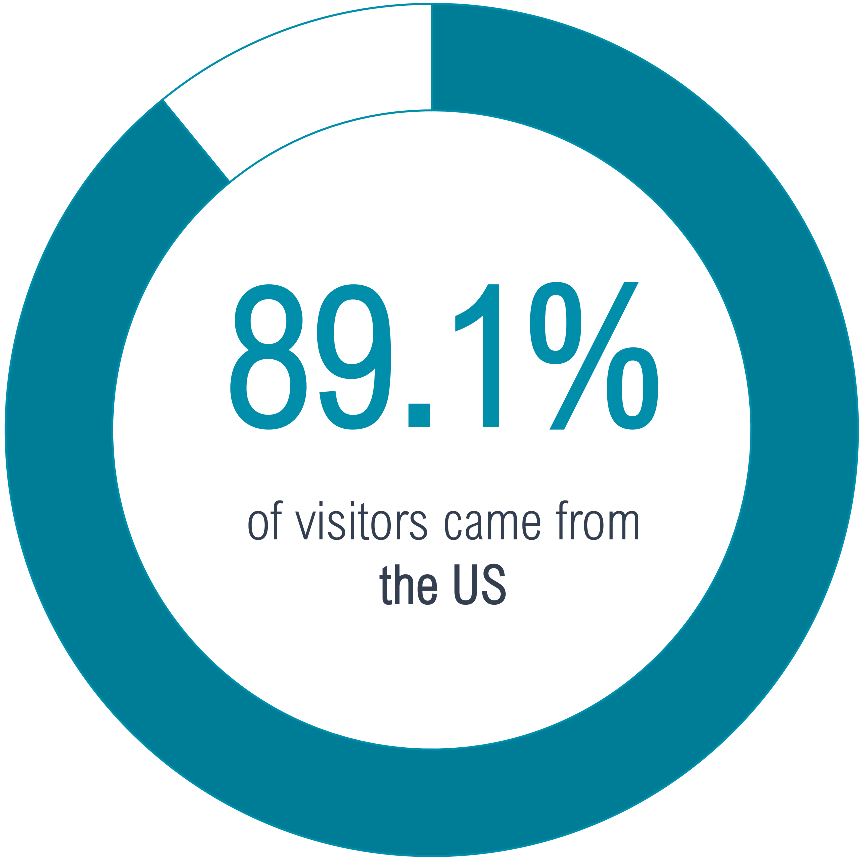
Trip Experience

Post-Trip Evaluation

Economic Impact on Destination

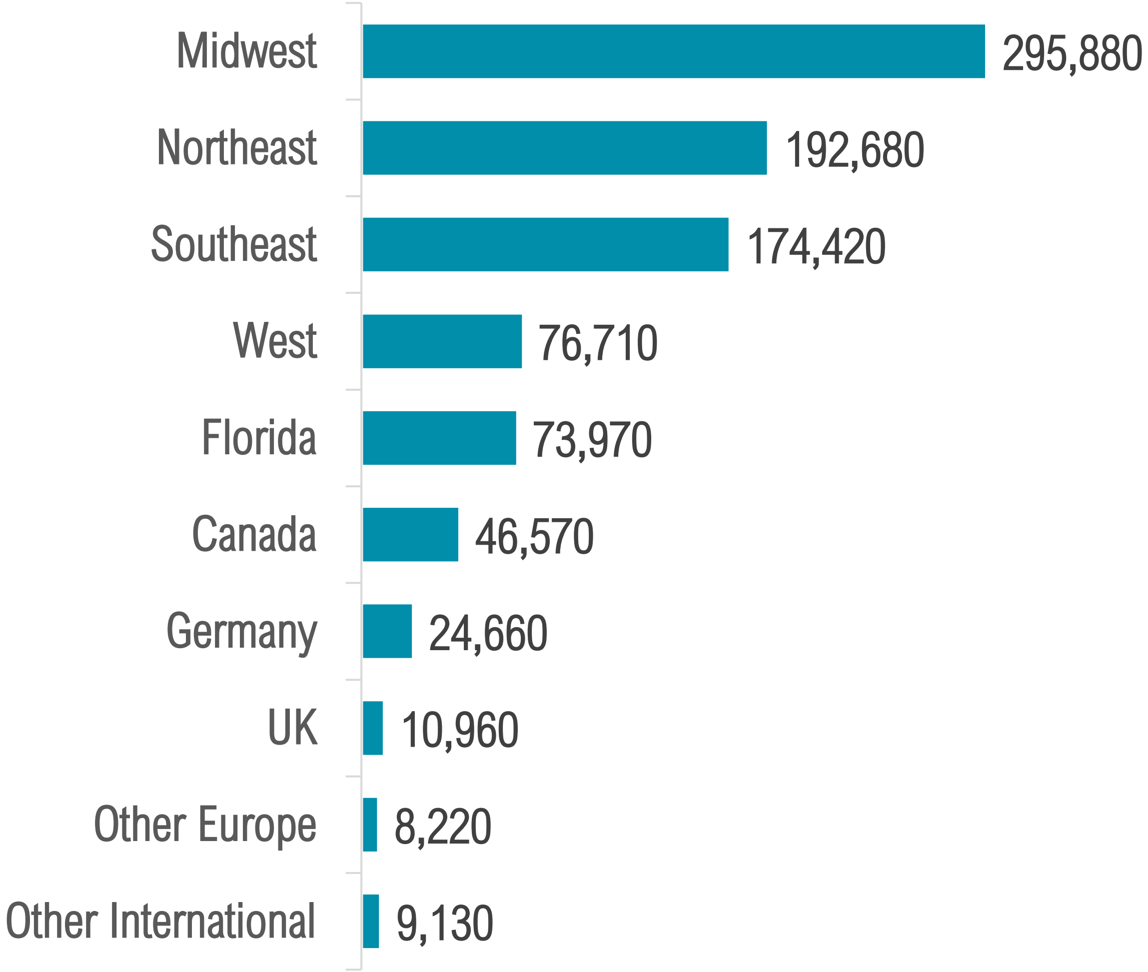
ORIGIN[1]





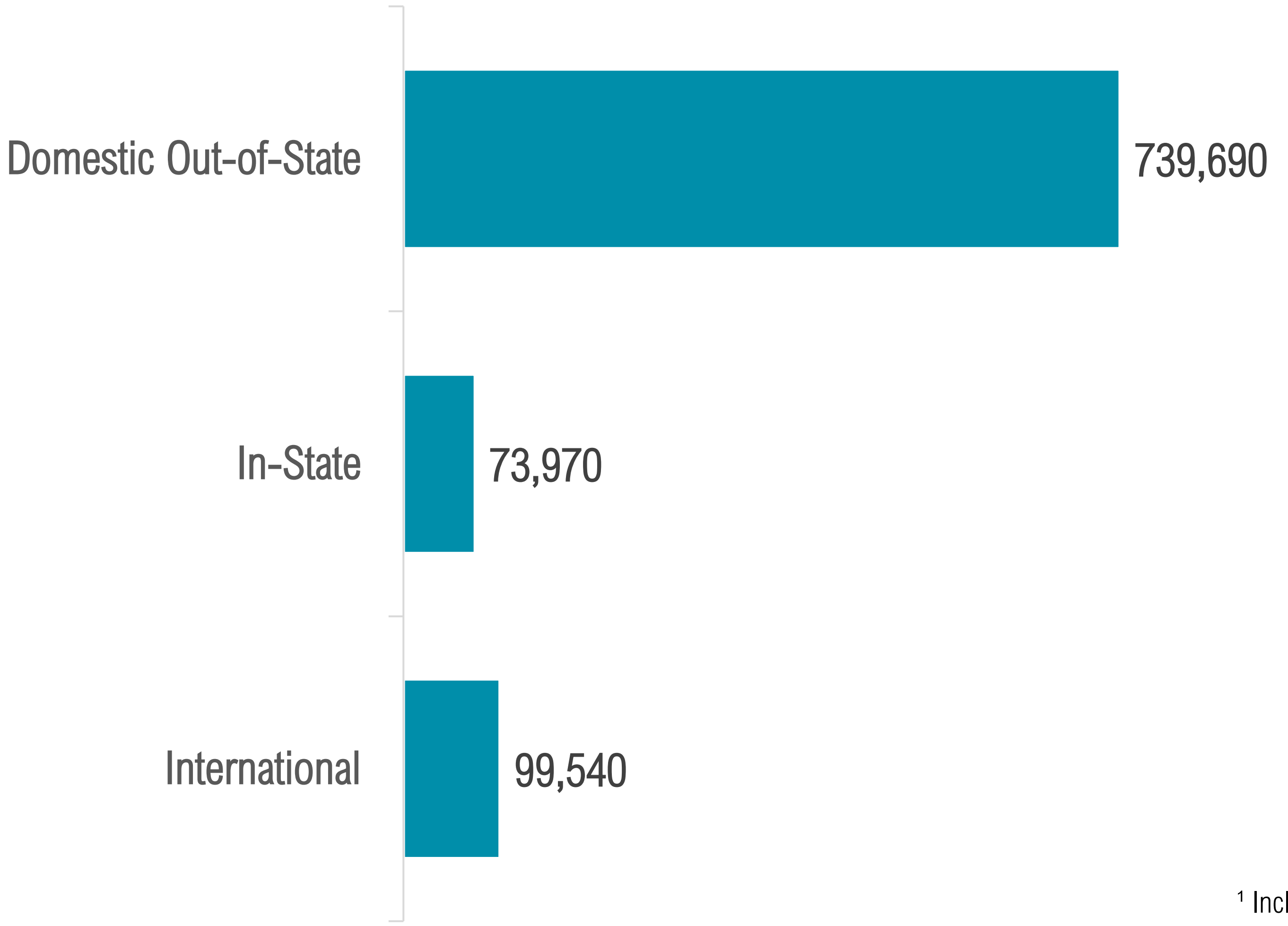
[1]Includes visitors who stayed in paid accommodations, non-paid accommodations, and day trippers. Based on data from the Visitor Tracking Study.

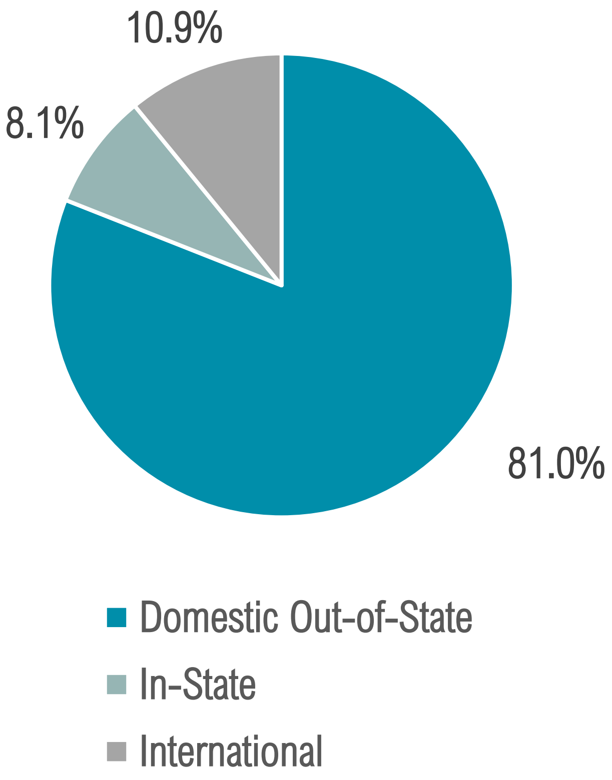
NUMBER OF VISITORS BY ORIGIN[1]



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

NUMBER OF VISITORS BY ORIGIN[1]

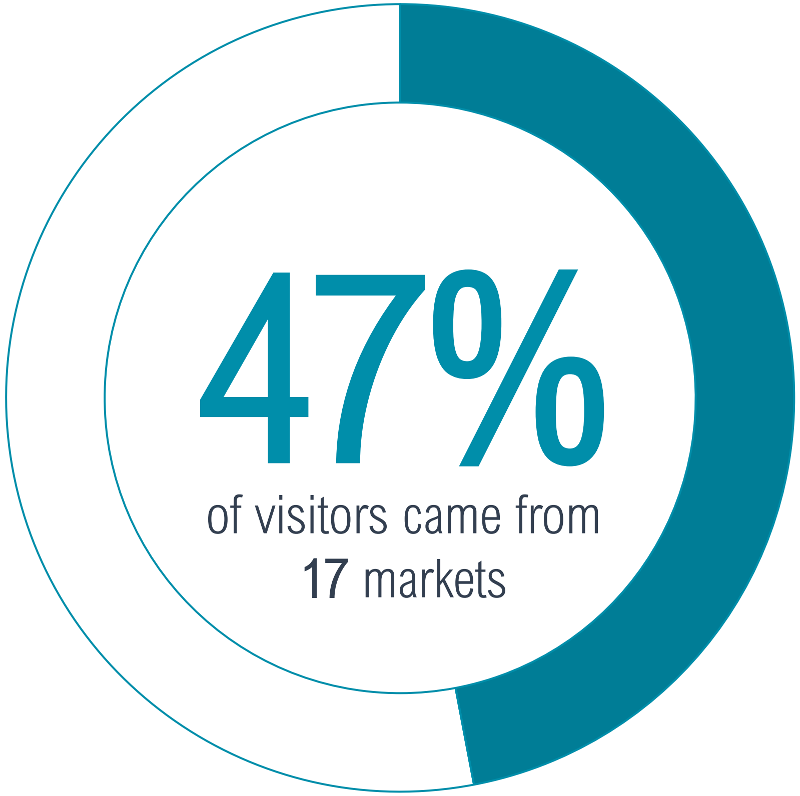




[1] Includes visitors who stayed in paid accommodations, non-paid accommodations, and day trippers. Based on data from the Visitor Tracking Study.

ORIGIN MARKETS[1,2]

Market [3,4]	Percentage of Visitors
New York City	5.2%
Chicago	5.2%
Minneapolis-St. Paul	3.9%
Detroit	3.7%
Atlanta	3.5%
Boston	3.1%
Philadelphia	2.7%
Washington, DC-Hagerstown	2.6%
Cleveland-Akron	2.5%
Columbus, OH	2.2%
Denver	1.9%
Miami-Ft. Lauderdale	1.9%
Pittsburgh	1.8%
Dallas-Ft. Worth	1.7%
Tampa-St. Petersburg	1.7%
Milwaukee	1.5%
Nashville	1.5%



[1] Includes visitors who stayed in paid accommodations, non-paid accommodations, and day trippers.
[2] Based on data from the DSG Visitor Tracking Study.
[3] "Markets" refer to DMAs (Designated Marketing Areas) as defined by Nielsen Media Research.
[4] Many DMAs extend beyond the borders of their core state, such the New York City DMA extending beyond the state of NY itself and including portions of NJ, CT, and PA, and the Washington, D.C. DMA extending beyond DC itself and including large portions of MD, VA, as well as some areas of WV.

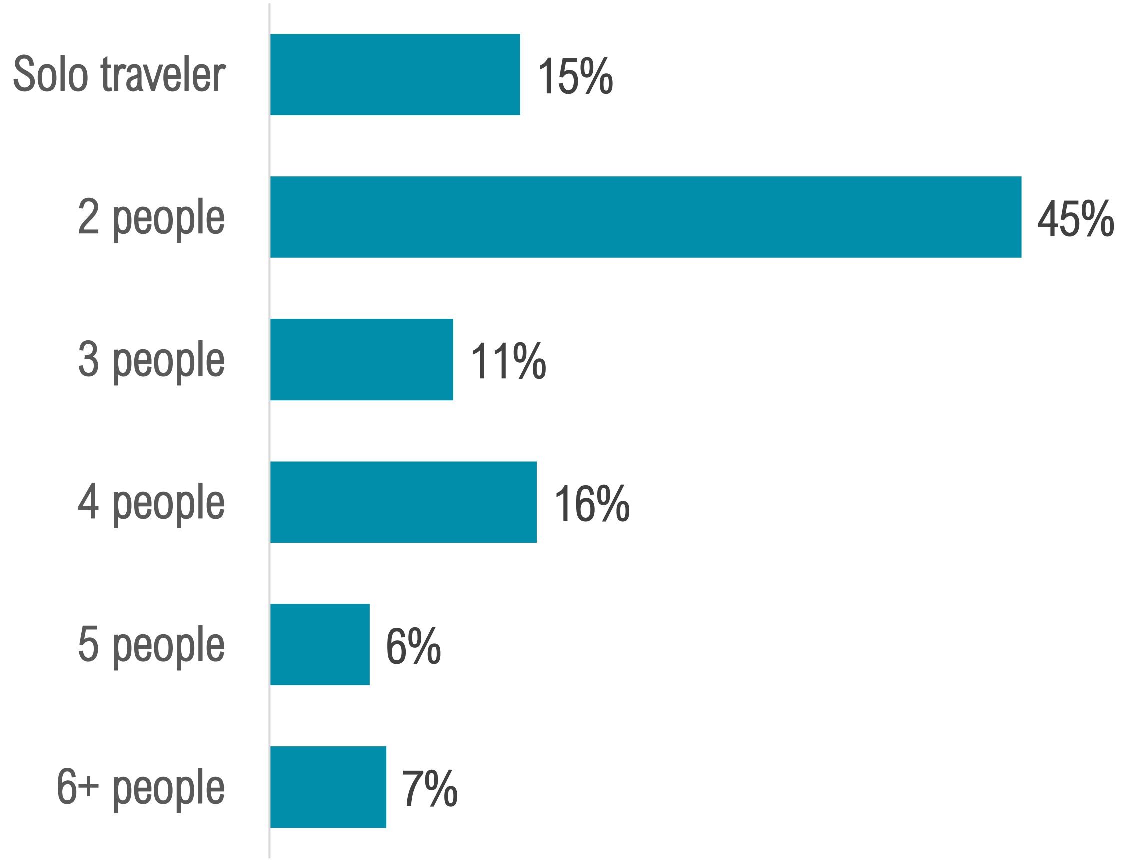
TRAVEL PARTY SIZE AND COMPOSITION[1]

Travel Party Size

The average travel party size was 2.8 visitors.

Travel with Children

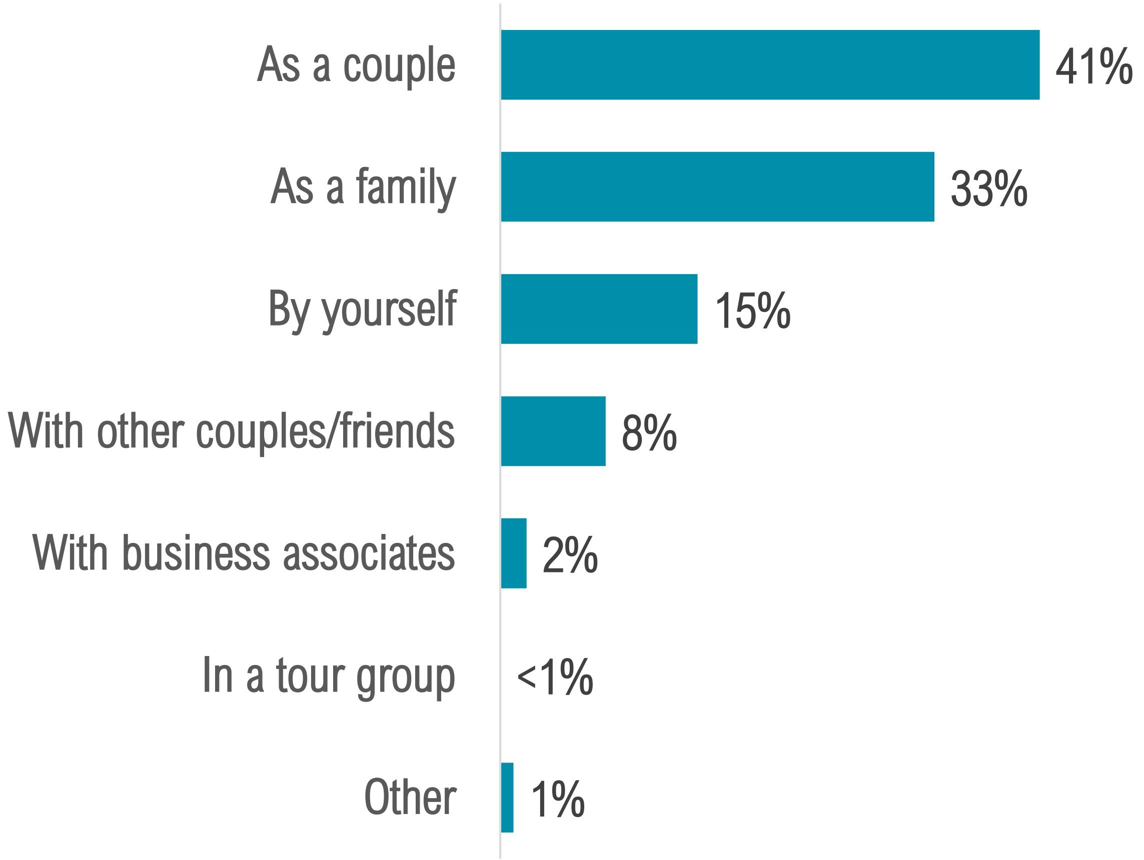
26% of visitors traveled with children under the age of 18.



[1]Sources: Occupancy Study and Visitor Tracking Study

TRAVEL PARTY TYPE

Nearly 3 in 4 visitors traveled either as a family or as a couple, while 15% of visitors traveled alone.



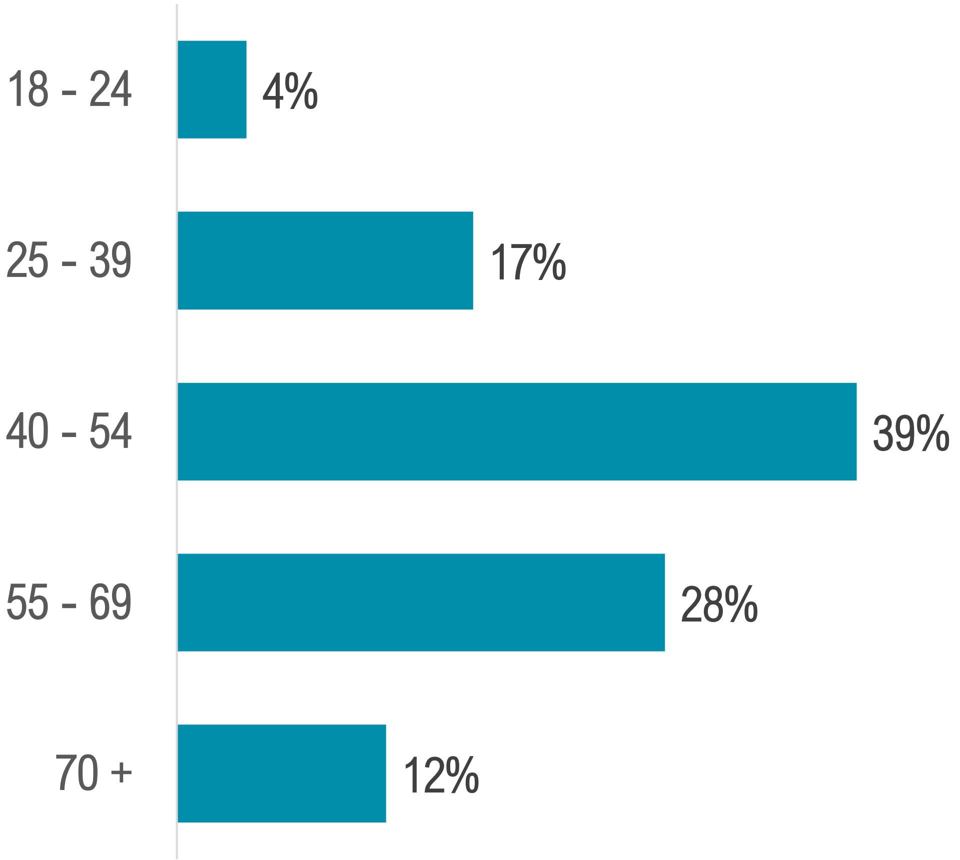
AGE

Average Age

The average age of Oct - Dec visitors was **51 years old.**

Median Age

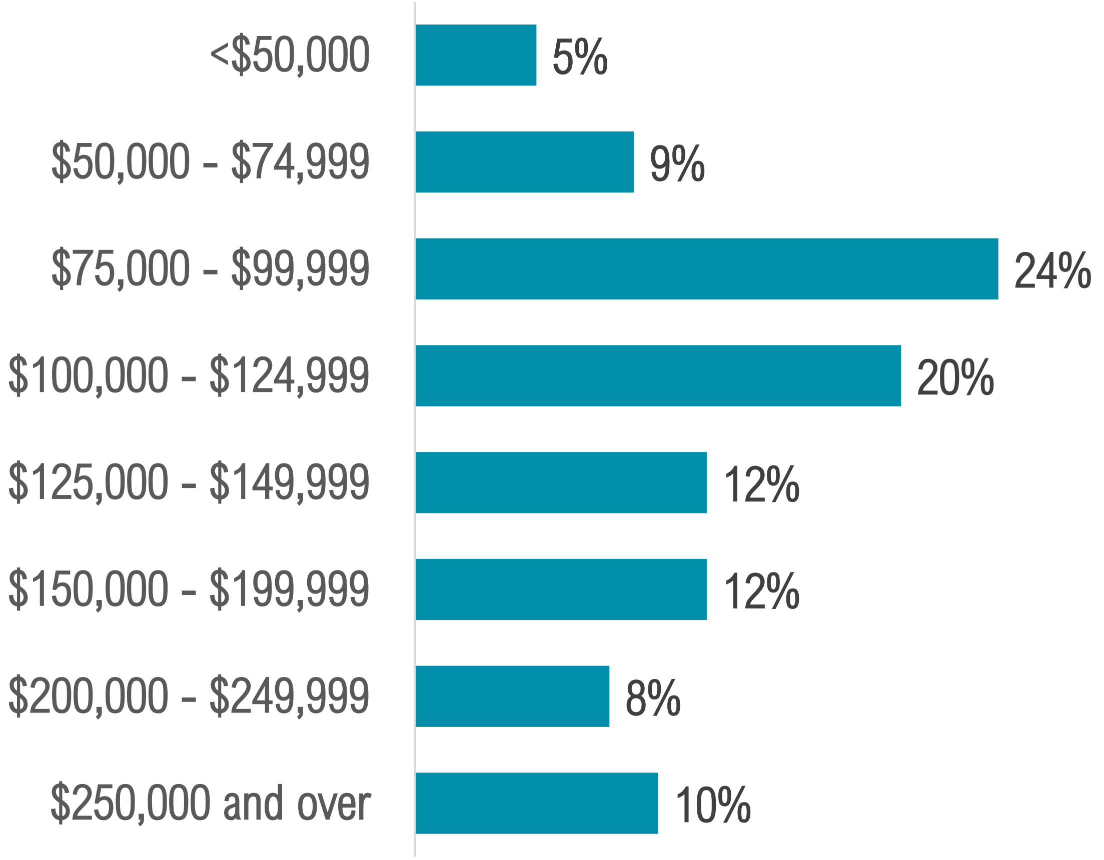
The median age of Oct - Dec visitors was **51 years old.**



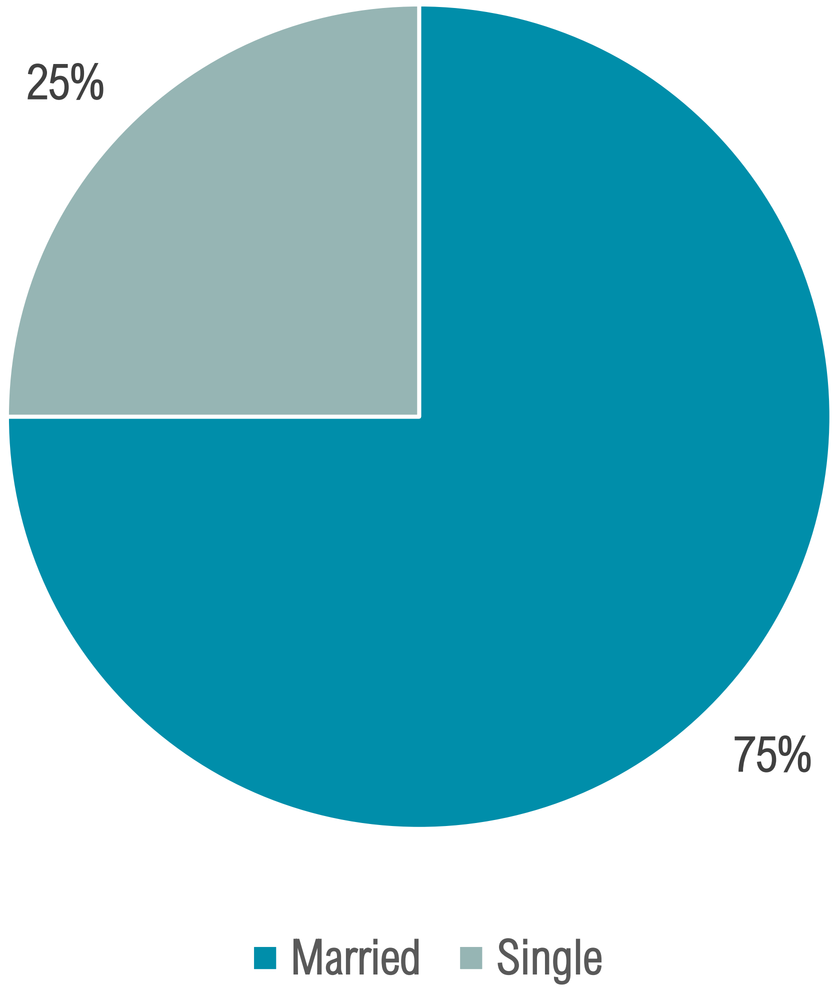
HOUSEHOLD INCOME

Median Household Income
Oct - Dec visitors had a median household income of **$115,000.**

18% of visitors had a household income in excess of **$200,000.**



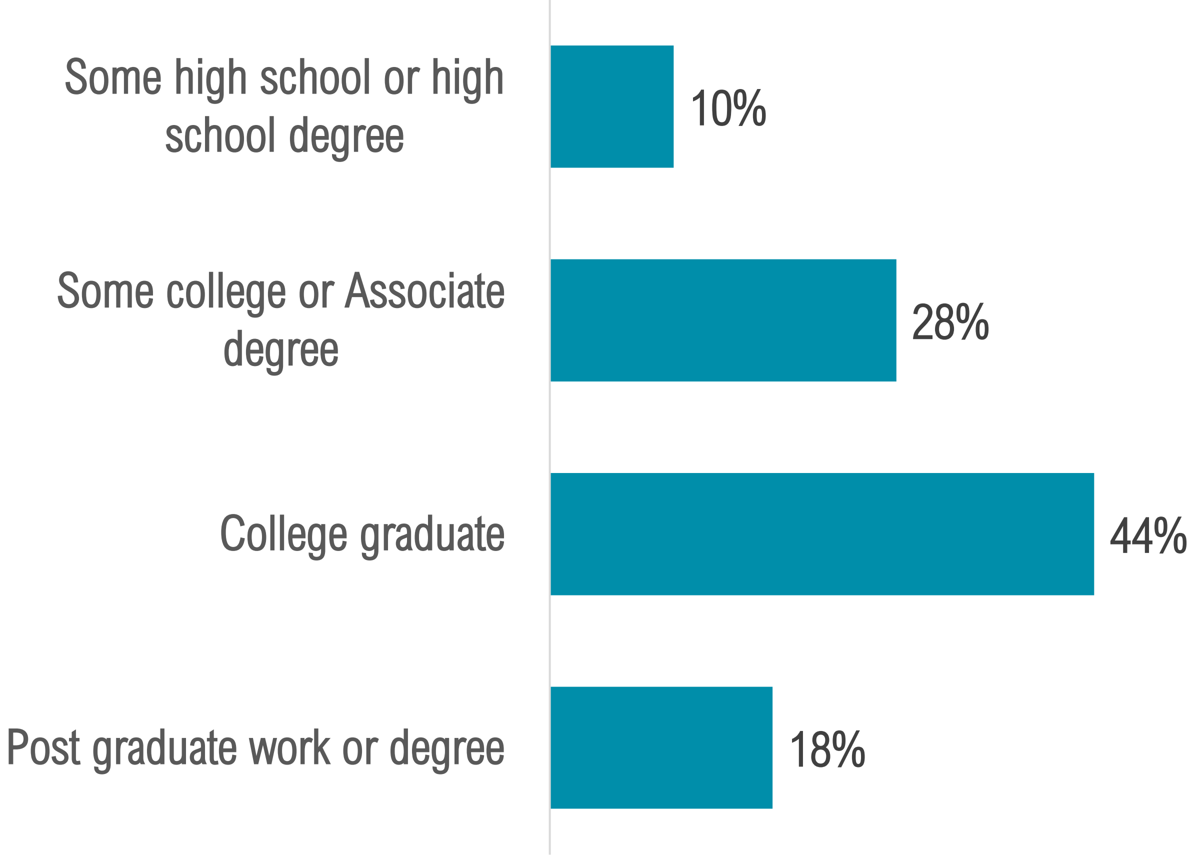
MARITAL STATUS



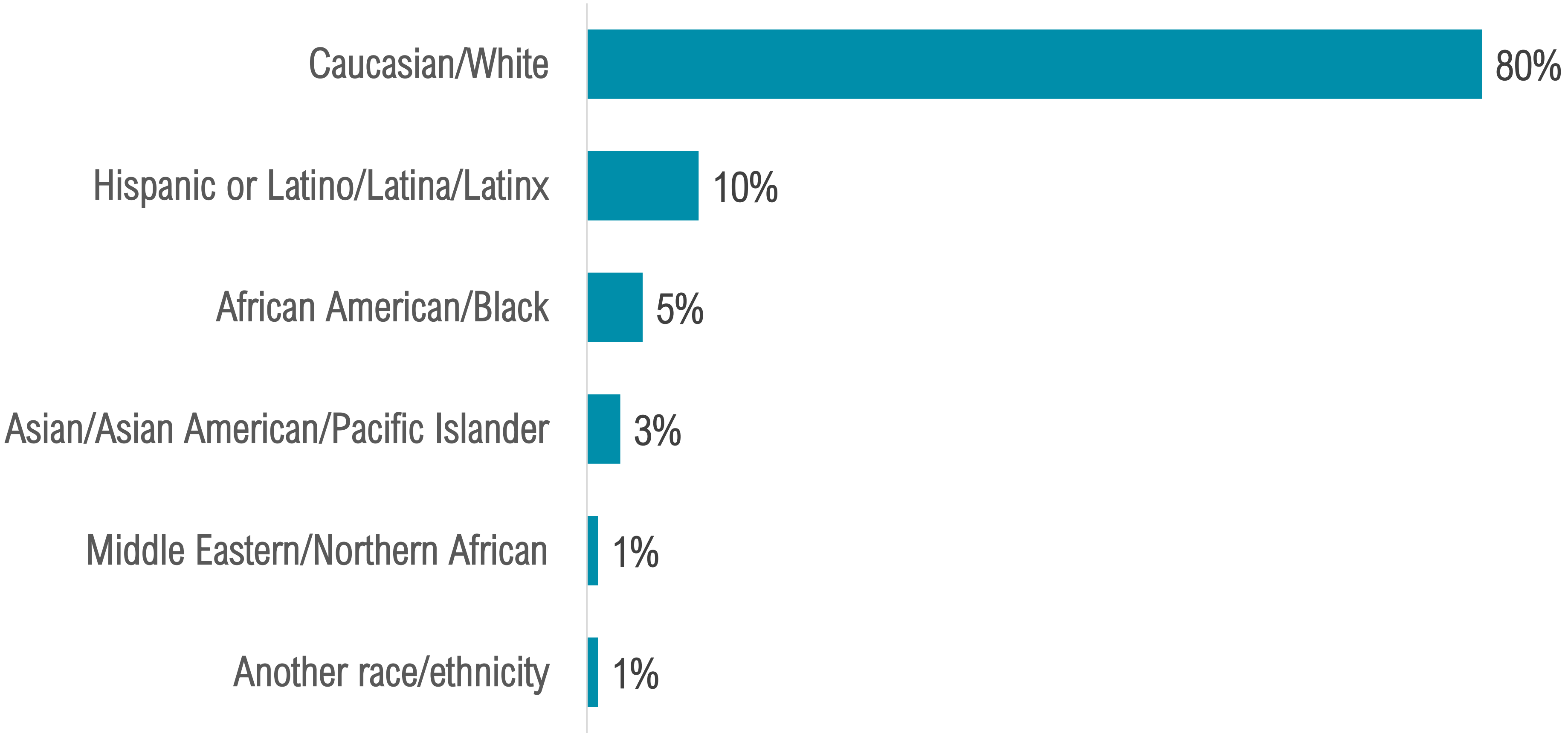
EDUCATION

Education Level

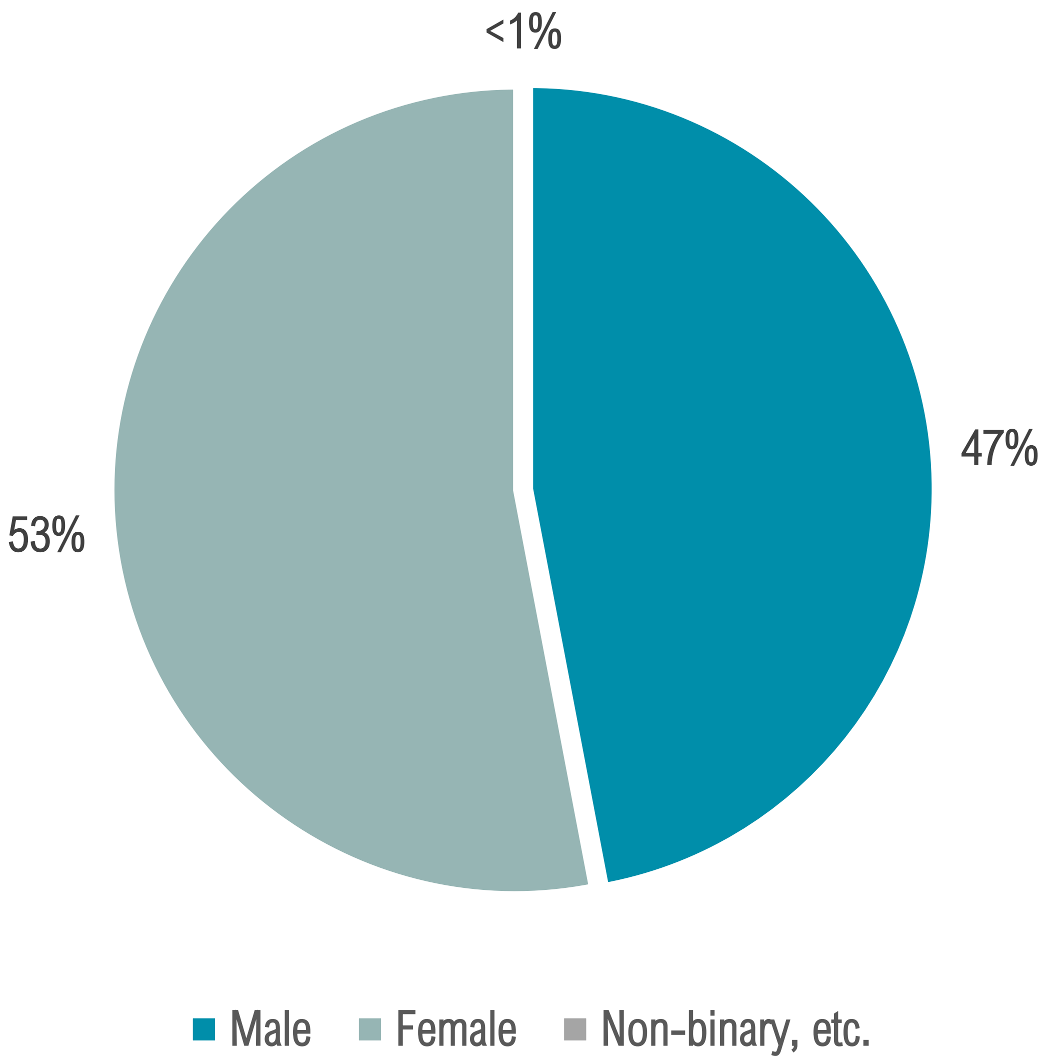
Over 3 in 5 October - December visitors had achieved a bachelor's degree or higher.



RACE/ETHNICITY



GENDER[1]

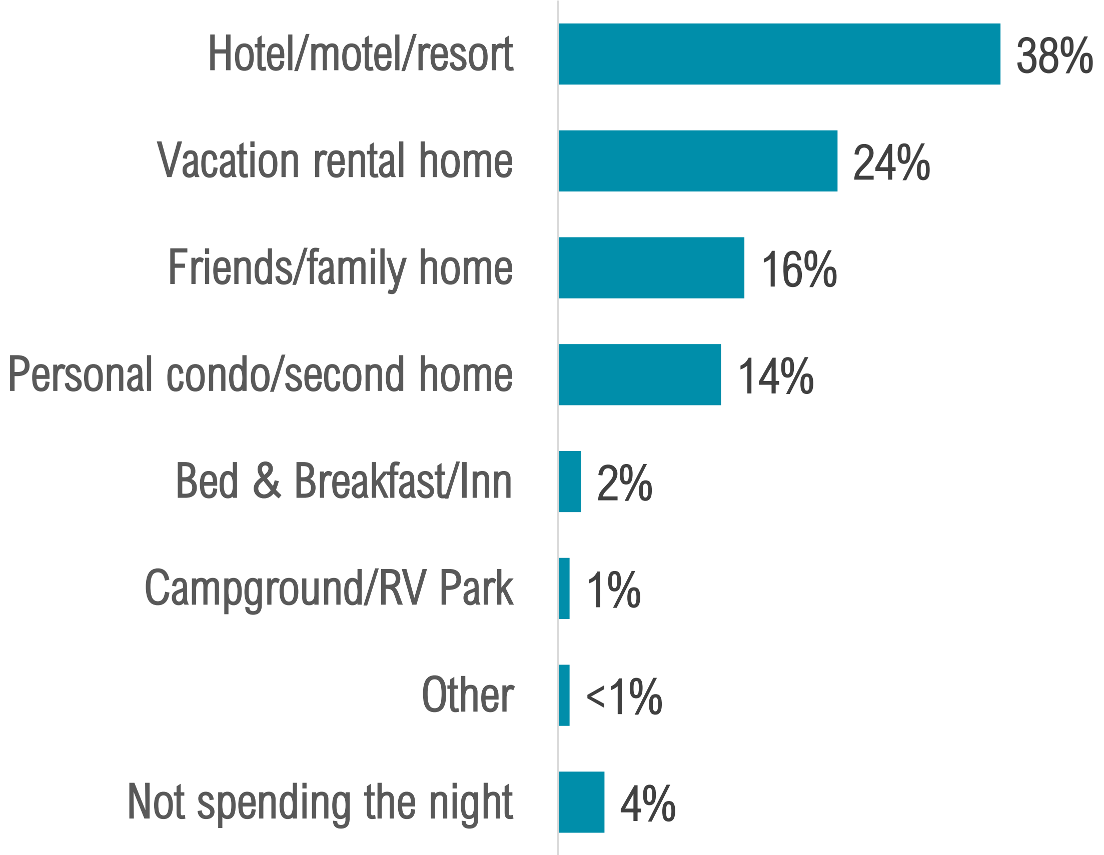


[1]Gender of person interviewed.

VISITOR JOURNEY: TRIP EXPERIENCE

ACCOMMODATIONS

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



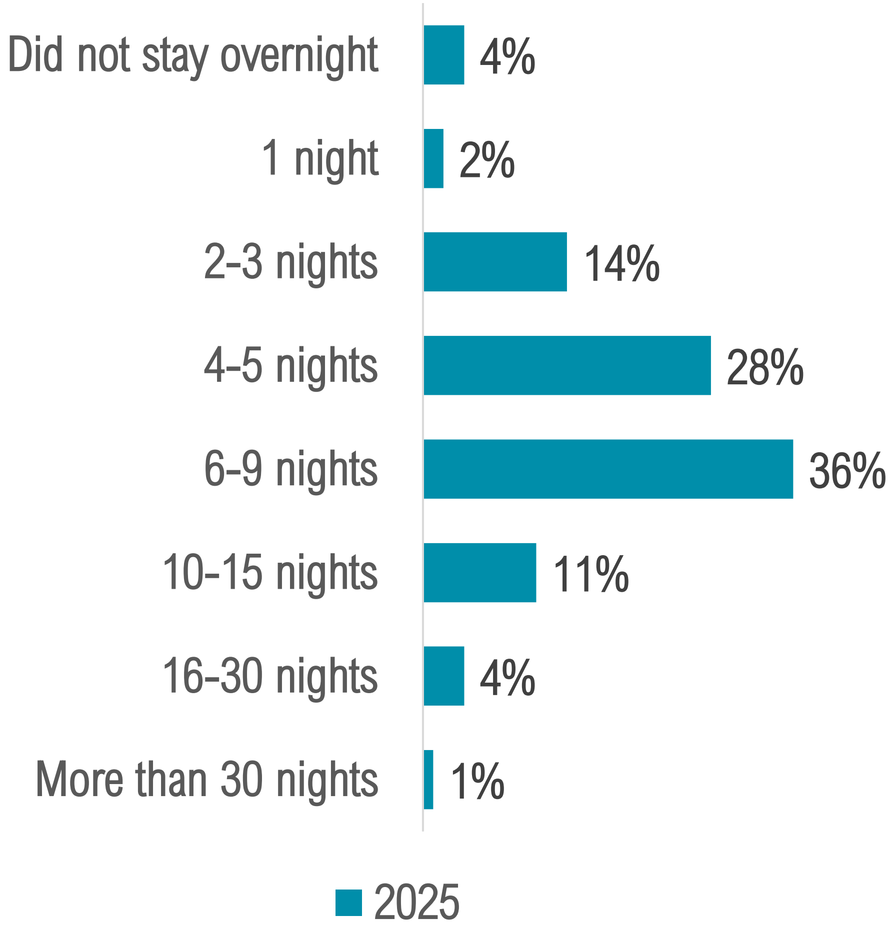
NIGHTS STAYED[1]

All Visitors

Visitors spent an average of **6.3 nights** in the Fort Myers area.

Visitors Staying in Paid Accommodations

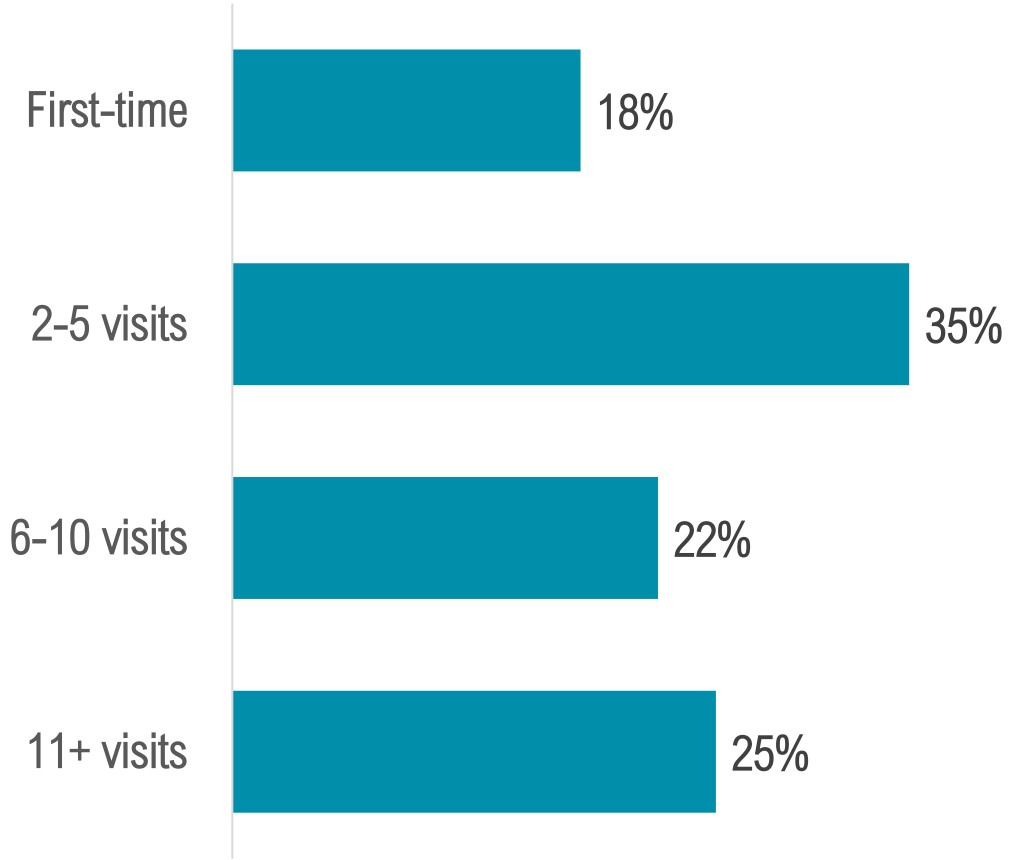
Visitors staying in paid accommodations spent an average of **6.0 nights** in the Fort Myers area.



[1]Sources: DSG Occupancy Study and DSG Visitor Tracking Study

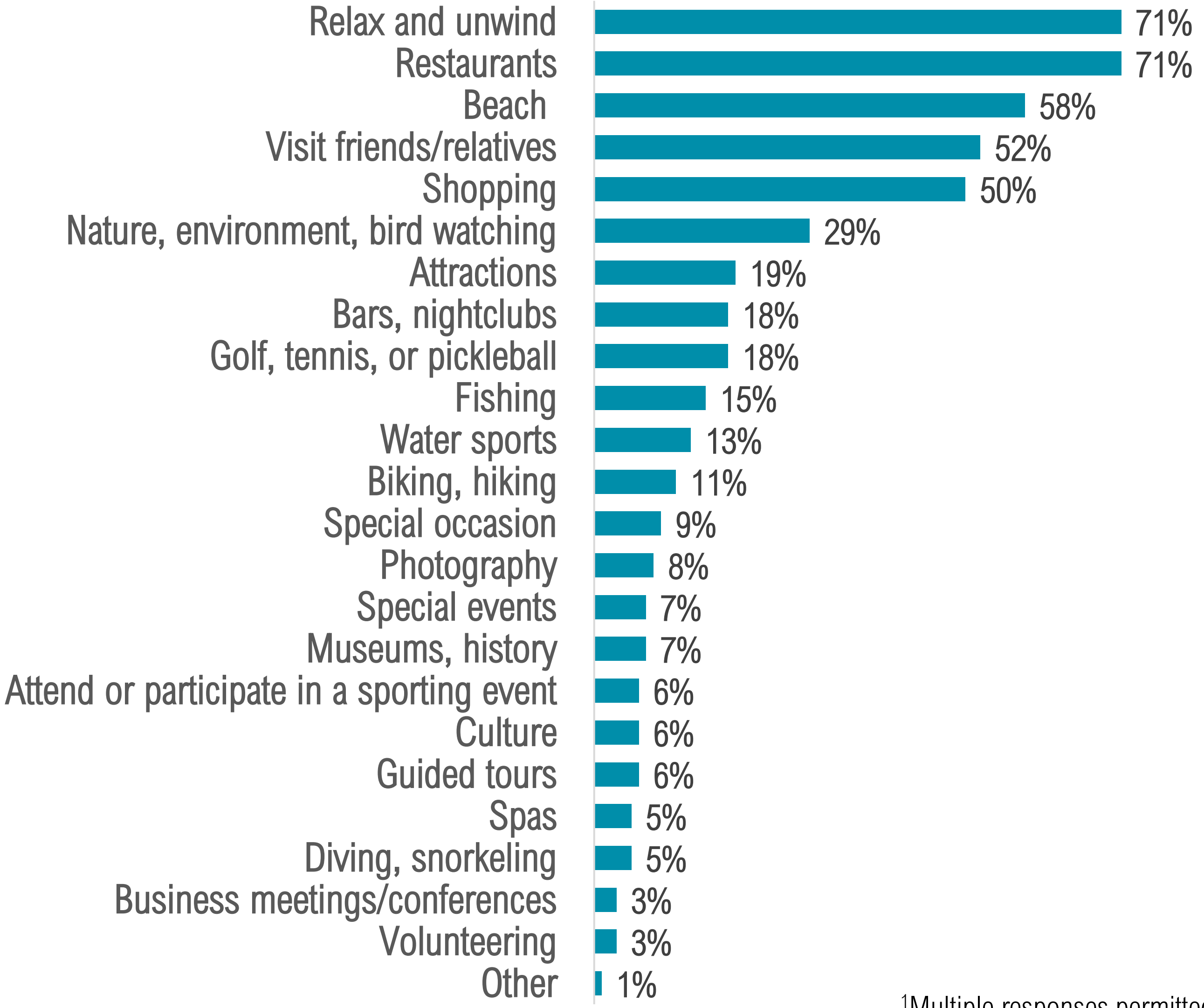
FIRST TIME AND EXPERIENCED VISITORS

18% of visitors were visiting for the first time, while 25% were highly loyal visitors, having visited more than 10 times.



VISITOR ACTIVITIES[1]

Relaxing, dining out at local restaurants, enjoying the beach, patronizing local shops, and spending time with friends/relatives dominate visitor activities, with all other recreation playing a secondary role.



[1]Multiple responses permitted.

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

Reason for Visiting		Visitor Activities
55%	Relax and unwind	71%
42%	Visit friends/relatives	52%
38%	Beach	58%
14%	Shopping	50%
12%	Nature, environment, bird watching	29%
9%	Attractions	19%
9%	Golf, tennis, or pickleball	18%
9%	Special occasion	9%
5%	Fishing	15%
5%	Sporting event	6%
4%	Special events	7%
4%	Water sports	13%
3%	Business meetings/conferences	3%
2%	Biking, hiking	11%
2%	Photography	8%
2%	Volunteering	3%
1%	Culture	6%
1%	Diving, snorkeling	5%
1%	Guided tours	6%
1%	Museums, history	7%

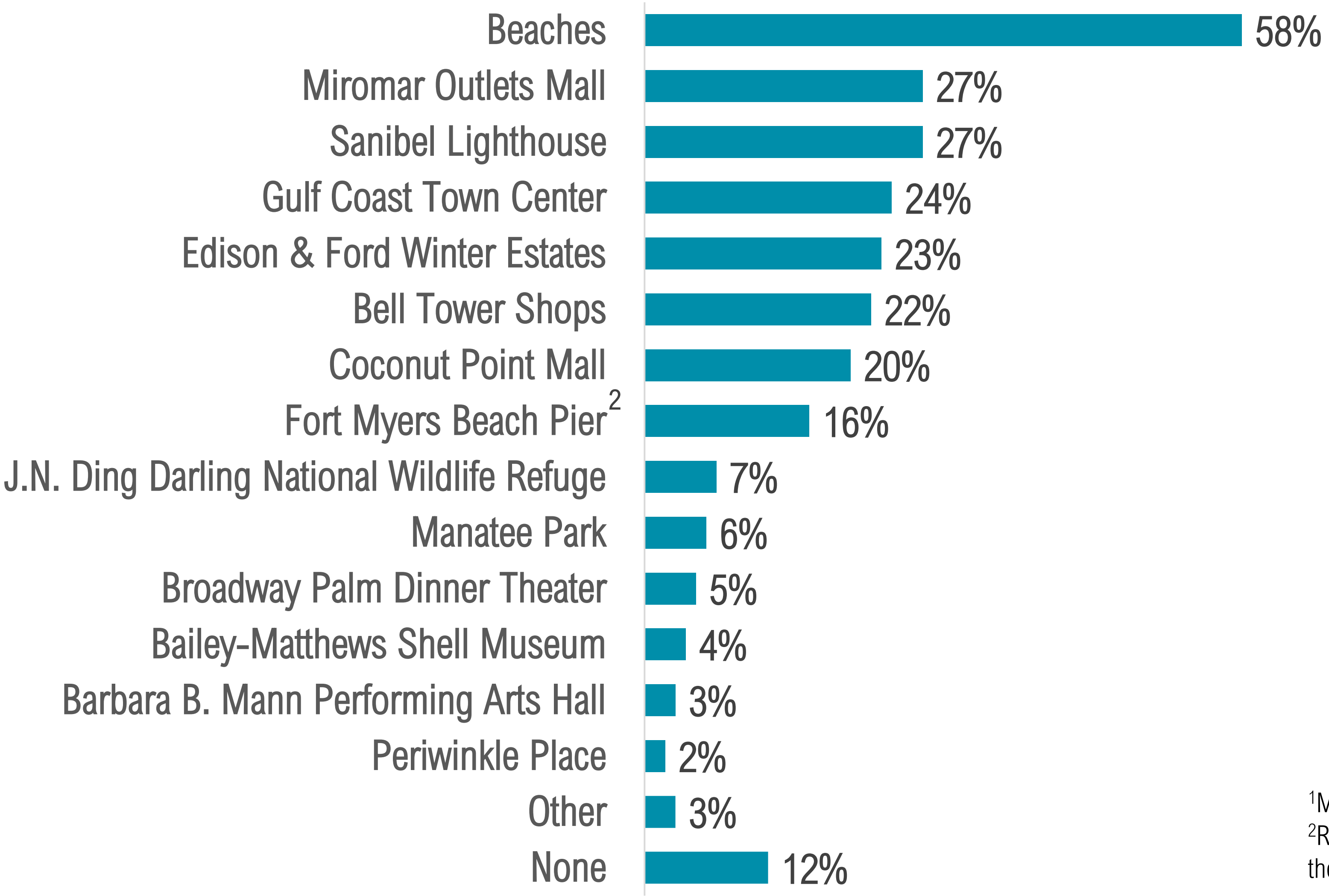
Oct – Dec 2025

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

fort MYERS
ISLANDS, BEACHES & NEIGHBORHOODS

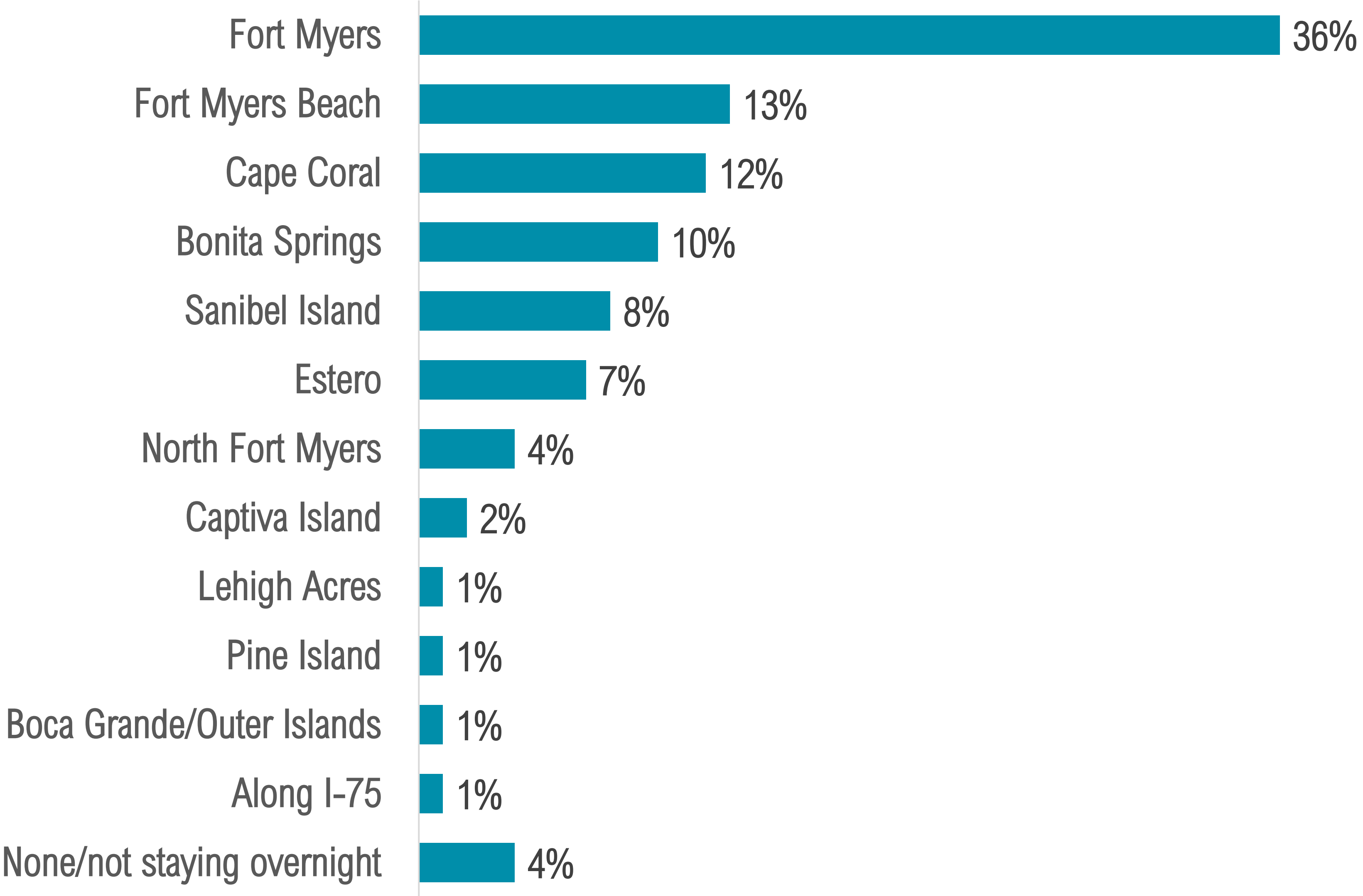
downs & st. germain RESEARCH

ATTRACTIONS VISITED[1]



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

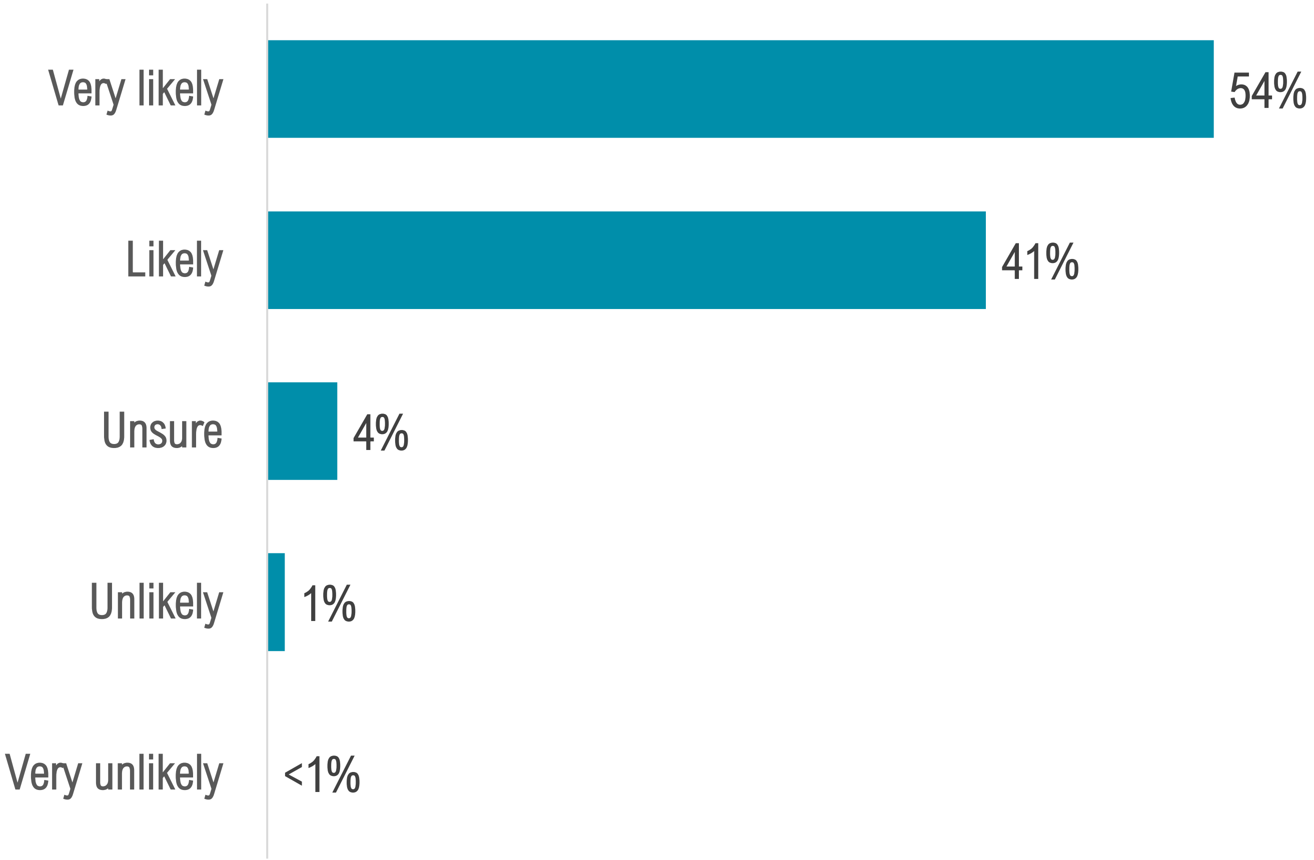
COMMUNITY STAYED



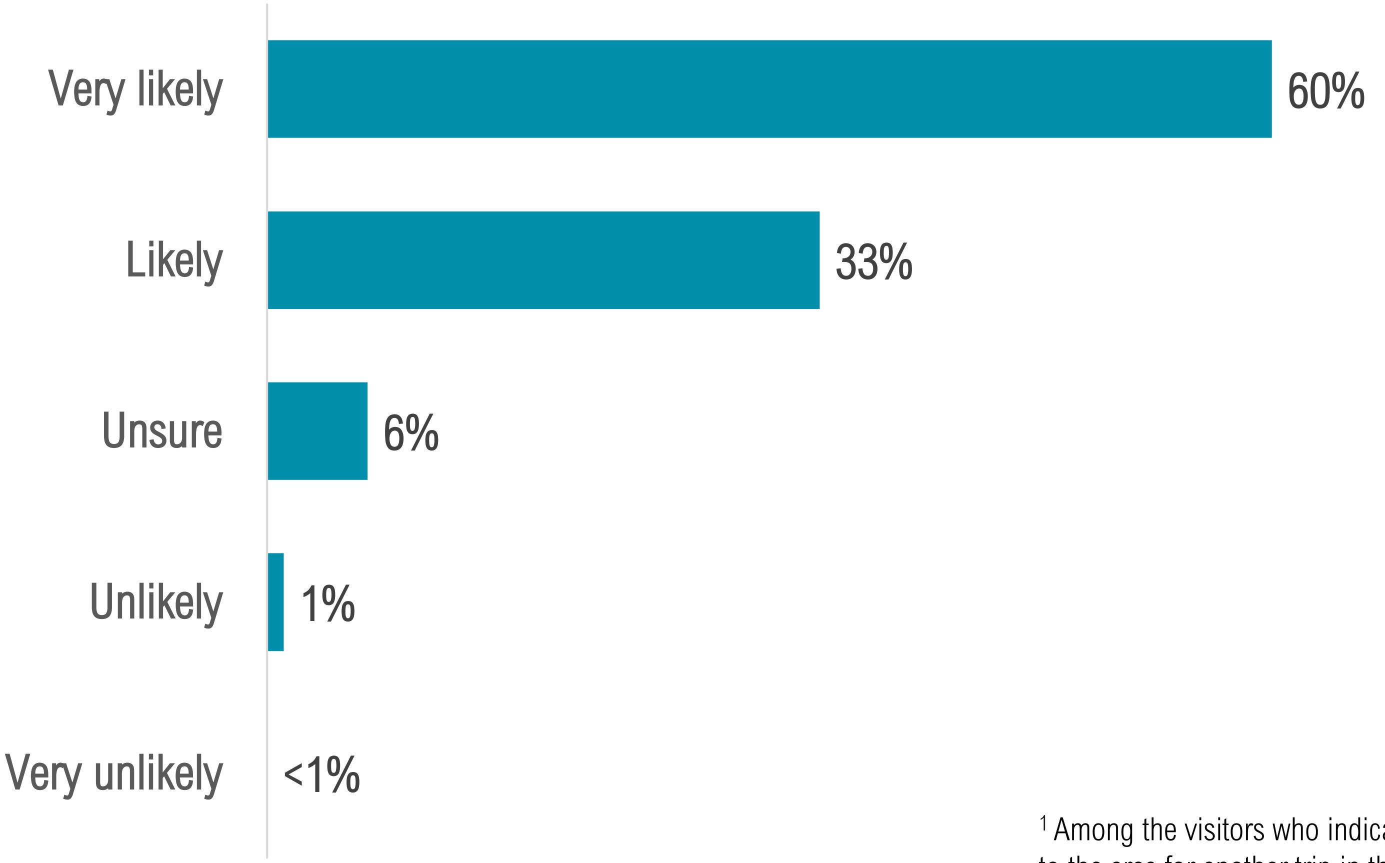
VISITOR JOURNEY: POST-TRIP EVALUATION

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

LIKELIHOOD OF RECOMMENDING THE AREA

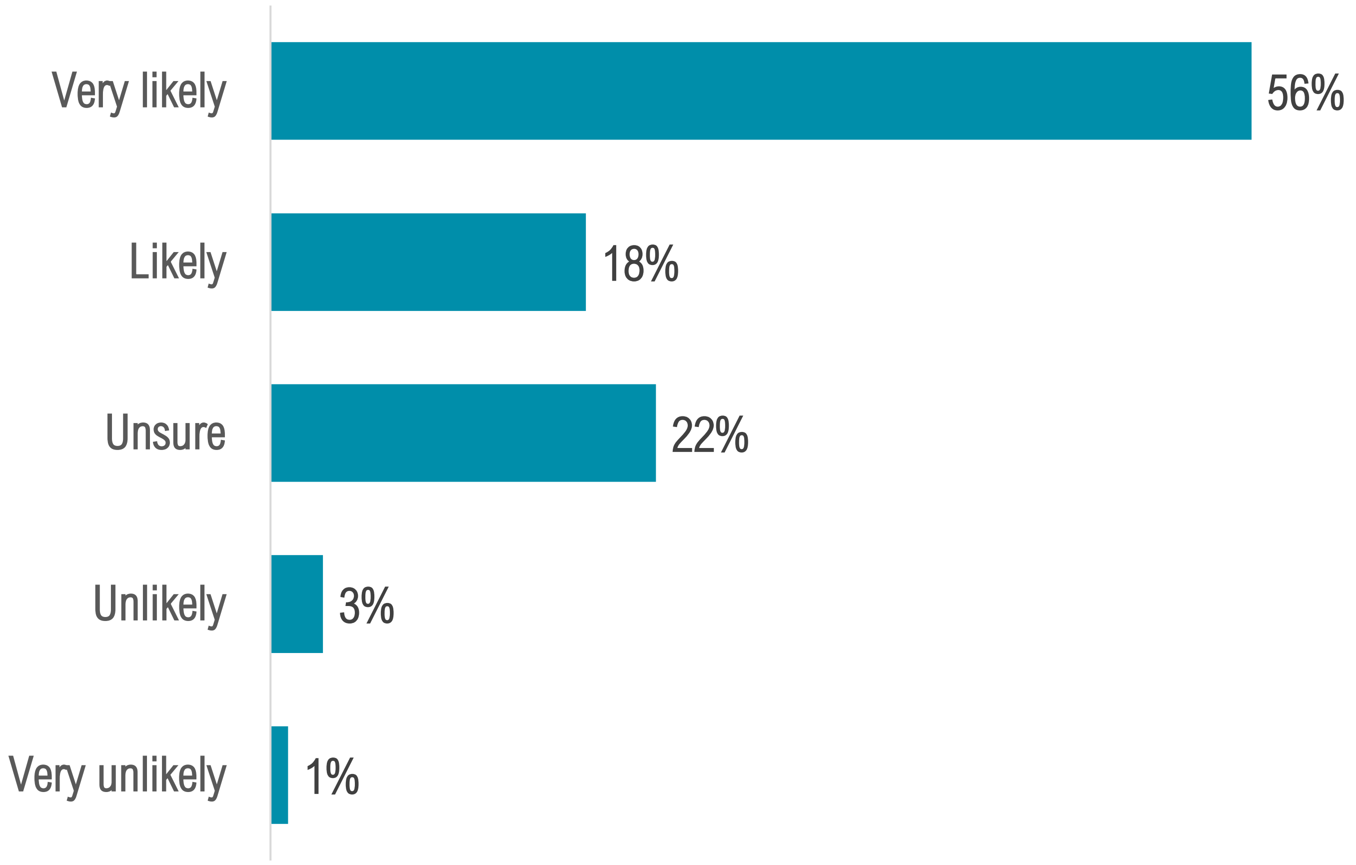


LIKELIHOOD OF RETURNING TO THE AREA[1]



[1] Among the visitors who indicated that they are “unlikely” or “very unlikely” to return to the area for another trip in the future, the most cited reason was that the area has undergone a change to its overall look and feel because of hurricanes in the past few years. However, these visitors represent just 1% of all visitors.

LIKELIHOOD OF RETURNING NEXT YEAR



CROSSTABULATIONS: LIKELIHOOD OF RECOMMENDING

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int’l Visitors	
	2024	2025	2024	2025	2024	2025	2024	2025
Very Likely	36%	45%	49%	55%	44%	52%	58%	57%
Likely	48%	45%	45%	42%	47%	43%	35%	39%
Unsure/don’t know	15%	8%	5%	3%	7%	4%	5%	3%
Unlikely	4%	2%	<1%	<1%	1%	1%	1%	1%
Very Unlikely	<1%	<1%	1%	<1%	1%	<1%	1%	<1%

CROSSTABULATIONS: LIKELIHOOD OF RETURNING

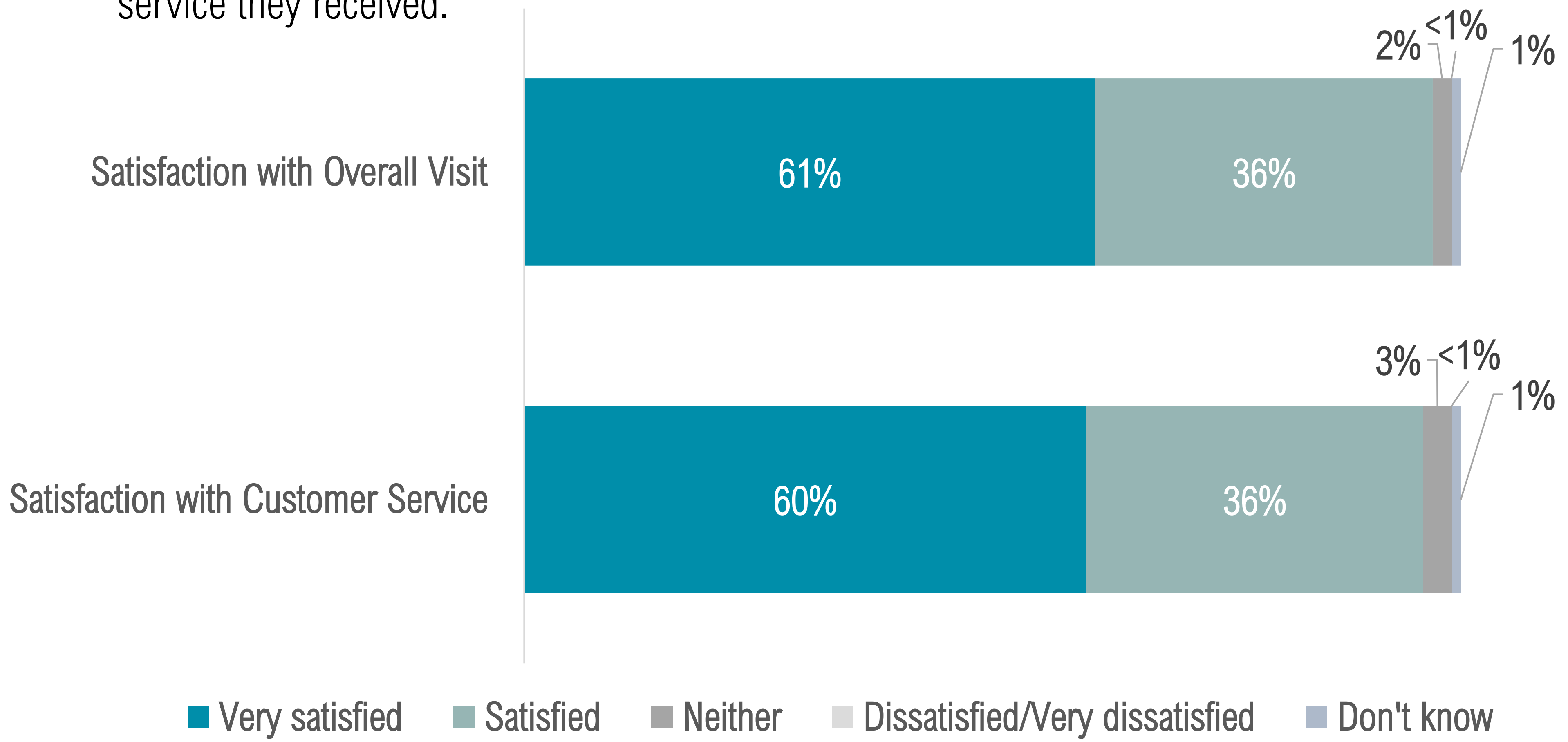
	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2024	2025	2024	2025	2024	2025	2024	2025
Very Likely	35%	45%	55%	64%	47%	59%	66%	71%
Likely	38%	36%	37%	33%	40%	35%	29%	25%
Unsure/don't know	19%	14%	6%	3%	10%	5%	4%	3%
Unlikely	6%	4%	1%	<1%	2%	1%	<1%	1%
Very Unlikely	2%	1%	1%	<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	32%	39%	53%	57%	47%	53%	58%	59%
Likely	21%	16%	20%	28%	21%	28%	18%	15%
Unsure/don't know	42%	31%	25%	12%	30%	15%	23%	19%
Unlikely	3%	11%	1%	2%	1%	3%	<1%	5%
Very Unlikely	2%	3%	1%	1%	1%	1%	1%	2%

SATISFACTION

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



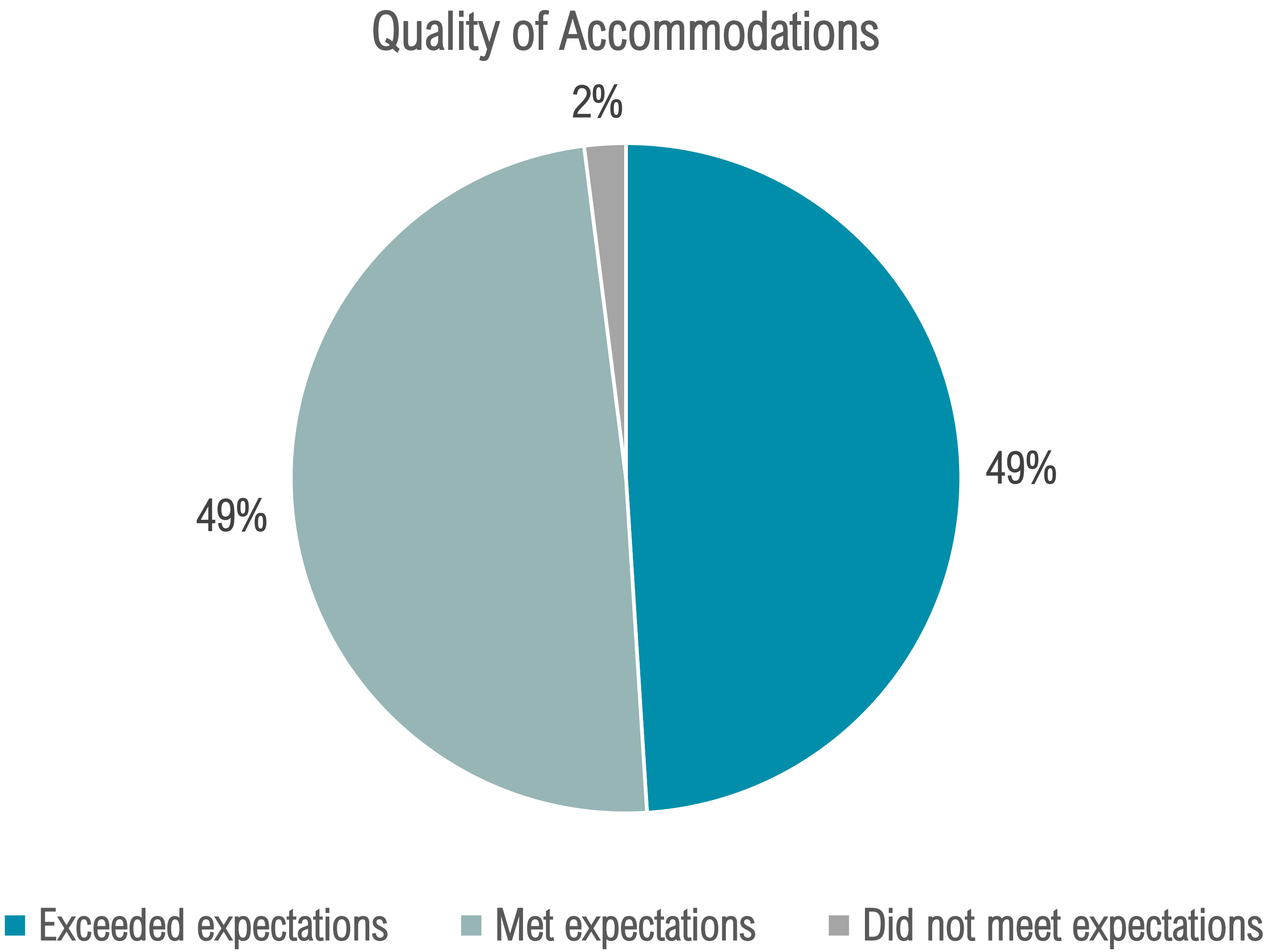
CROSSTABULATIONS: SATISFACTION WITH OVERALL VISIT

	First Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2024	2025	2024	2025	2024	2025	2024	2025
Very Satisfied	47%	55%	53%	57%	50%	56%	65%	72%
Satisfied	45%	41%	43%	41%	45%	42%	32%	26%
Unsure/don't know	6%	3%	4%	2%	4%	2%	3%	2%
Dissatisfied	2%	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	50%	56%	55%	57%	53%	56%	64%	69%
Satisfied	42%	39%	39%	40%	41%	40%	34%	29%
Unsure/don't know	6%	3%	5%	3%	5%	3%	2%	2%
Dissatisfied	2%	2%	1%	<1%	1%	1%	<1%	<1%
Very Dissatisfied	<1%	<1%	<1%	<1%	<1%	<1%	<1%	<1%

SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

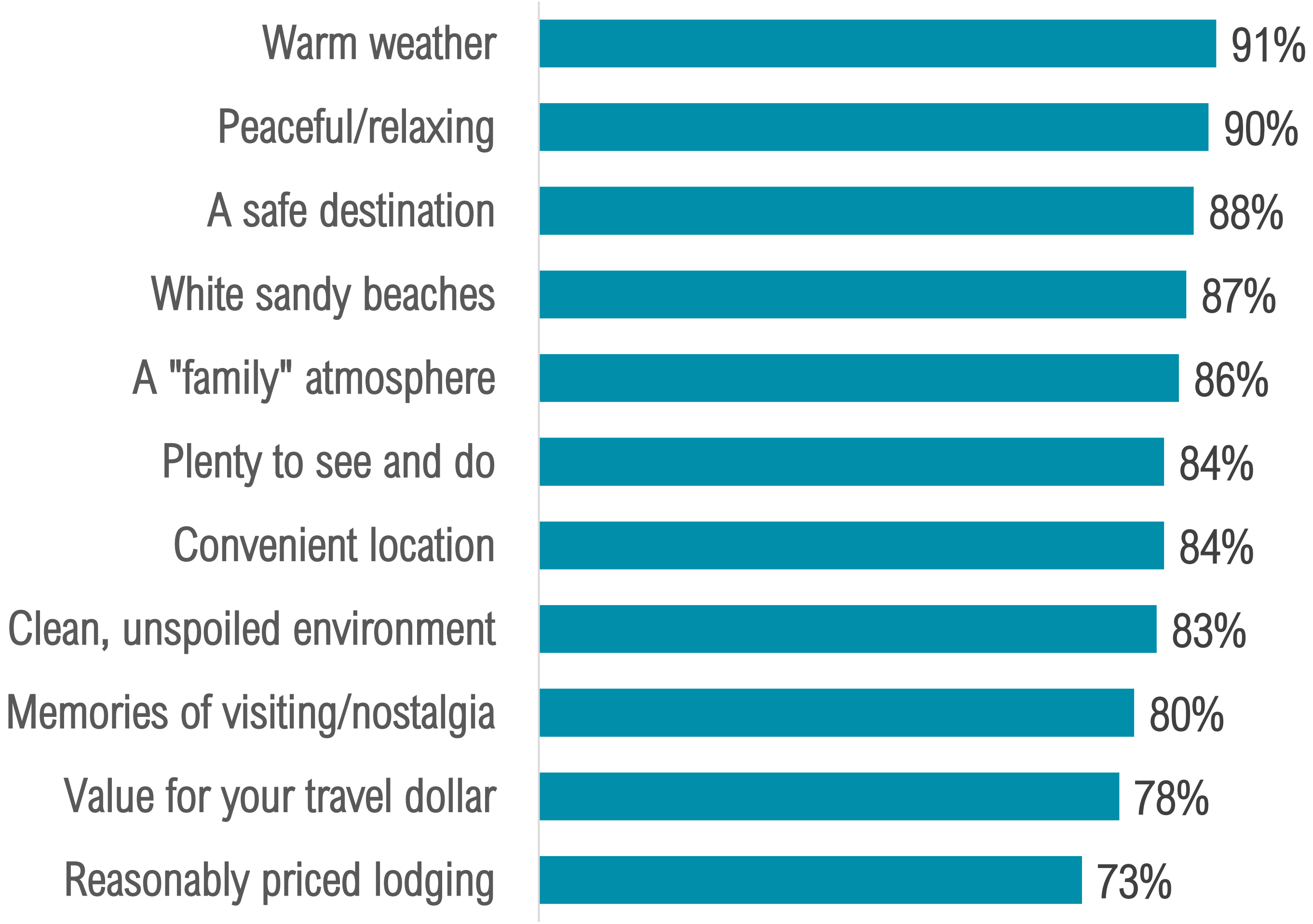


SATISFACTION RATINGS: QUALITY OF ACCOMMODATIONS

	1st Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2024	2025	2024	2025	2024	2025	2024	2025
Exceeded Expectations	37%	43%	48%	52%	44%	49%	50%	55%
Met Expectations	58%	53%	50%	46%	52%	48%	48%	36%
Did Not Meet Expectations	5%	4%	2%	2%	4%	3%	2%	9%

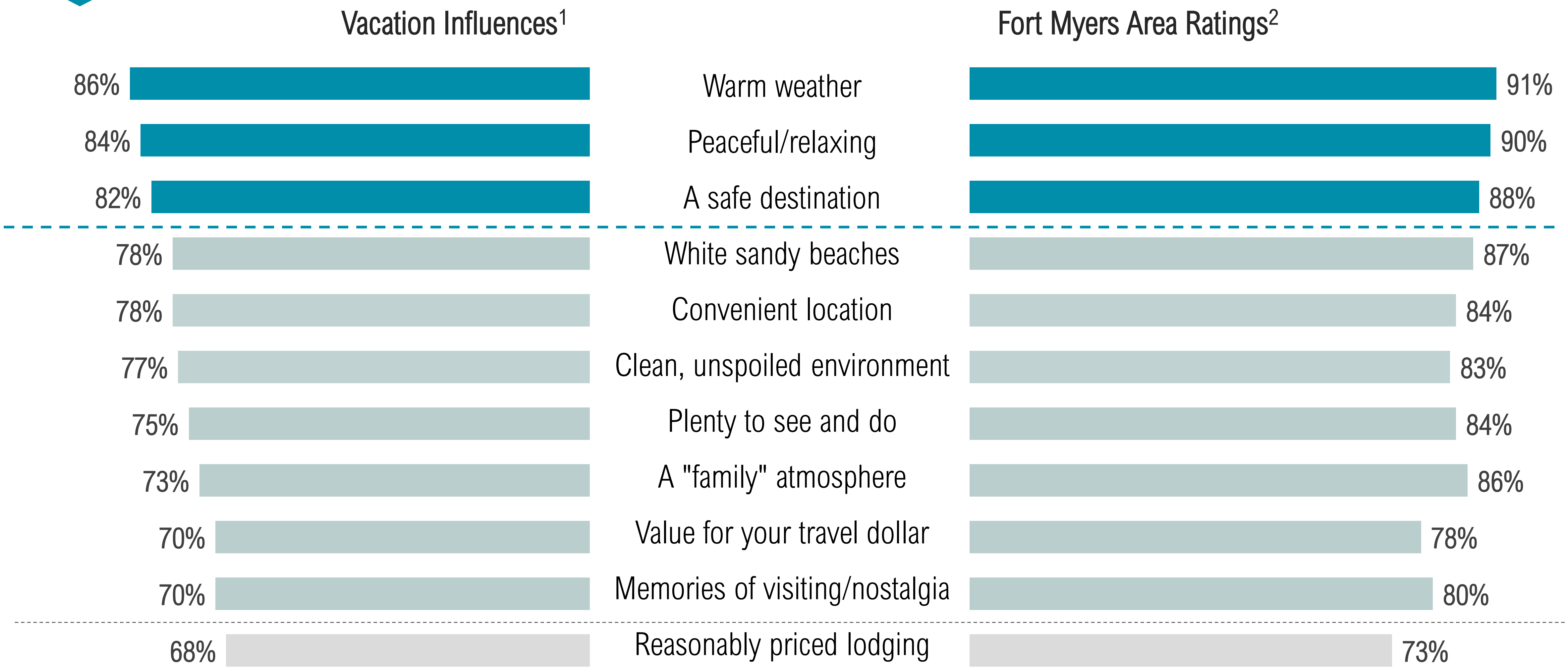
ATTRIBUTE RATINGS[1]

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

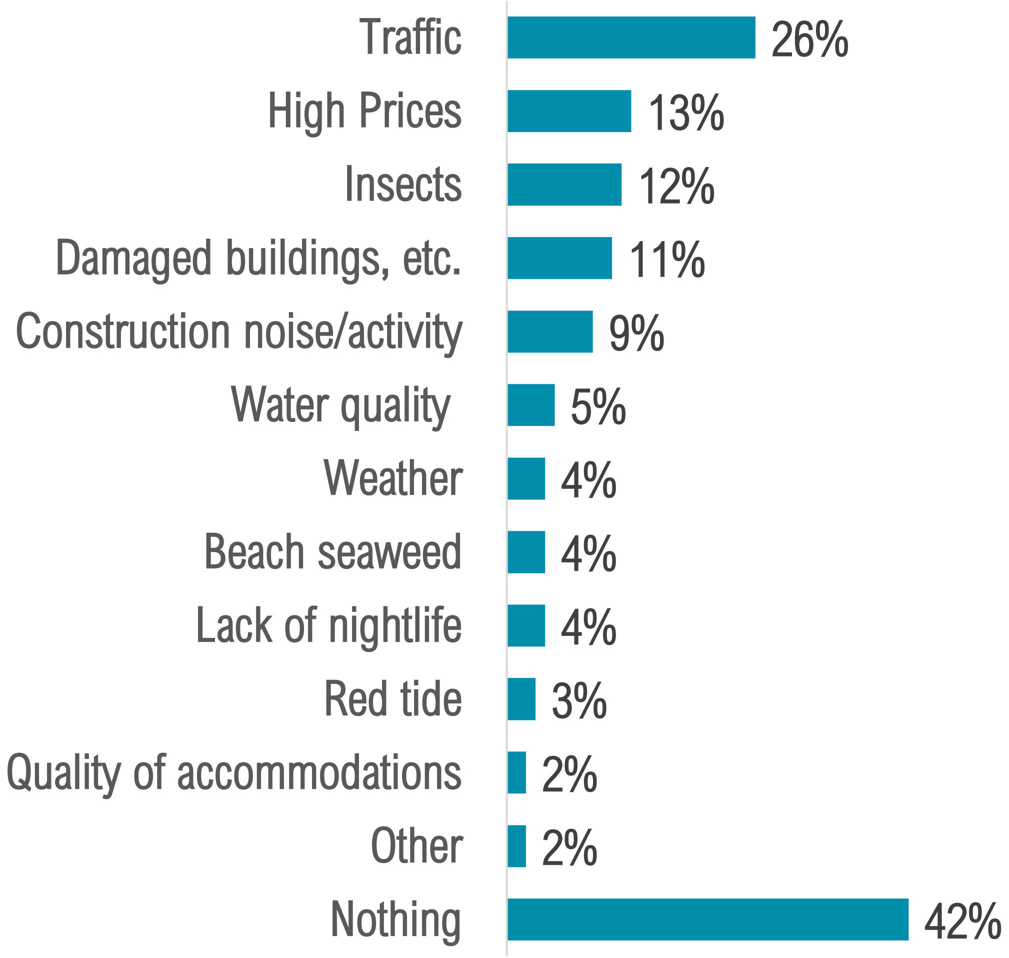


[1]Top 2 box scores. Attributes rated on a scale from 1 to 5 where 1 is Not at All Influential and 5 is Definitely Influential.

[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 **around 1 in 10** were concerned with either **high prices, insects, damaged buildings, or construction**. **Over 2 in 5** visitors had **no concerns** at all during their visit.



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

AREA DESCRIPTIONS

Peaceful & Relaxing

- "Fort Myers is calm, sunny, and a good place if you like beaches, warm weather, and a peaceful lifestyle."
- "Always tell our friends that we love the beaches here on the Gulf Coast. Very relaxing and peaceful area."
- "We enjoy the trips here every year. The beaches are great and we love collecting shells, because it's so peaceful and relaxing."

Warm Weather

- "Fort Myers feels like stepping into summer all year long. It's warm, sunny, and way more tropical than what we're used to. Instead of mountains and winding roads, everything is flat and palm trees are everywhere."
- "We love the warm weather and calm beaches. Our kids enjoy looking for shells and playing in the sand. It caters to a much different vacation style than the winter we are currently experiencing up north."

AREA DESCRIPTIONS

A Safe Destination

- ”Fort Myers is a great family beach area. Lots of places to eat, very clean city, I feel safe everywhere I go.”
- “Safe, quiet, clean beach and water, friendly and laid back. Flip flops are acceptable attire anywhere.”
- “Very safe and clean area. We enjoy biking and walking and enjoying nature and the weather here.”

White Sandy Beaches

- “This is a great place to be and have because we have the woods at home and they have the white sandy beaches here.”
- “White sandy beaches, beautiful sunshine, friendly people, a great destination for a vacation.”
- “We've been coming to the Fort Myers area for 25 years and we love it and the white sandy beaches.”

OCCUPANCY BAROMETER[1]: JAN – MAR RESERVATIONS

Jan – Mar Reservations	Jan – Mar 2025	Jan – Mar 2026
Up	27%	45%
Same	10%	25%
Down	63%	30%

[1]Sources: DSG Occupancy Study

Accommodations partners were asked the following, "Please think about your reservations for the next three months. Compared to January through March of 2025, would you say the total level of reservations are up, the same, or down?"

OCCUPANCY BAROMETER[1]: APR – JUN RESERVATIONS

Apr – Jun Reservations	Apr – Jun 2025	Apr – Jun 2026
Up	25%	40%
Same	13%	35%
Down	62%	25%

[1]Sources: DSG Occupancy Study

Accommodations partners were asked the following, "Please think about your reservations for the next three months. Compared to April through June of 2025, would you say the total level of reservations are up, the same, or down?"

Year-Over-Year Comparisons

ECONOMIC IMPACT

Visitor & Lodging Statistics[1]	Oct - Dec 2024[4]	Oct - Dec 2025	% Change '24 – '25
Visitors	867,200	913,200	+ 5.3%
Visitor Days	5,411,300	5,716,600	+ 5.6%
Room Nights	1,078,700	1,213,600	+ 12.5%
Direct Expenditures[2]	$666,296,100	$791,304,300	+ 18.8%
Total Economic Impact[3]	$1,032,759,000	$1,224,787,200	+ 18.6%
Occupancy	58.0%	54.4%	- 6.1%
ADR	$141.87	$156.95	+ 10.6%
RevPAR	$82.27	$85.44	+ 3.8%

[1] Significantly more (+19.9%) units were available in Oct-Dec 2025 compared to Oct-Dec 2024. This is due to the ongoing recovery process post-Hurricane Ian as well as Helene and Milton.
[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]

	Oct - Dec 2024[4]	Oct - Dec 2025	% Change '24 – '25
Direct Jobs[2]	4,689	5,303	+ 13.1%
Total Jobs[3]	6,524	7,404	+ 13.5%
Direct Wages[2]	$150,301,300	$175,987,200	+ 17.1%
Total Wages[3]	$227,611,400	$266,802,100	+ 17.2%
Direct Local Taxes[2]	$23,376,700	$27,767,900	+ 18.8%
Total Local Taxes[3]	$31,074,300	$36,822,900	+ 18.5%
Direct State Taxes[2]	$20,537,200	$24,399,500	+ 18.8%
Total State Taxes[3]	$27,511,400	$32,603,900	+ 18.5%

[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	Oct - Dec 2024	Oct - Dec 2025
Visitors in Paid Accommodations	67%	65%
Visitors in Non-Paid Accommodations	32%	31%
Day Trippers	1%	4%

PRE-VISIT

Planned trip in advance	Oct - Dec 2024	Oct - Dec 2025
1 week or less	5%	6%
2-4 weeks	13%	16%
1-2 months	38%	35%
3-6 months	31%	28%
6 months or more	12%	14%
Not sure	1%	1%

Considered Other Destinations	Oct - Dec 2024	Oct - Dec 2025
Yes	24%	19%
No	76%	81%

PRE-VISIT

Other destinations considered[1]	Oct - Dec 2024[2]	Oct - Dec 2025[2]
Tampa/Clearwater/St. Pete	16%	20%
Sarasota/Siesta Key	13%	16%
Keys/Key West	11%	15%
Orlando	10%	15%
Miami/Ft. Lauderdale	14%	15%
Naples/Marco Island	9%	14%
Punta Gorda/Englewood	4%	7%
Daytona Beach	7%	4%
West Palm Beach	5%	4%
Other Destinations In FL	26%	17%
Other Destinations Outside Of FL	18%	14%

[1]Multiple responses permitted.
[2]Base: 19% of visitors who considered other destinations.

PRE-VISIT

Trip Planning Websites/Apps[1]	Oct - Dec 2024	Oct - Dec 2025
Airline websites/apps	36%	28%
Online search engines	29%	26%
Hotel websites/apps	16%	18%
Airbnb, Vrbo, etc.	19%	17%
Booking websites	16%	17%
Vacation rental websites/apps	12%	11%
Trip Advisor	11%	10%
Traveler reviews, blogs, stories	7%	8%
Visit Florida	11%	7%
Facebook	7%	7%
VCB Facebook Page	8%	7%
www.VisitFortMyers.com	10%	6%
Instagram	6%	5%
Streaming websites/apps	4%	4%
Other	2%	2%
None	23%	24%

[1]Multiple responses permitted.

PRE-VISIT

Information Requests[1]	Oct - Dec 2024	Oct - Dec 2025
Calling a hotel, motel, condo	19%	21%
Requesting and receiving a visitor guide	10%	7%
Receiving the VCB e-newsletter	6%	4%
Calling the VCB	3%	3%
Calling a local Chamber of Commerce	3%	2%
Other	1%	1%
None	68%	70%

[1]Multiple responses permitted.

PRE-VISIT

Recall of Lee County Promotions	Oct - Dec 2024	Oct - Dec 2025
Yes	35%	39%
No	46%	44%
Can't recall	19%	17%
% of recallers influenced by promotions	57%	64%
% of total visitors influenced by promotions	20%	25%

PRE-VISIT

Type of Promotions Recalled[1]	Oct - Dec 2025[2]	Oct - Dec 2025[3]
Internet	52%	51%
Social media	37%	43%
Traveler reviews, blogs	22%	19%
Television	16%	12%
Travel/visitor guide	11%	10%
www.VisitFortMyers.com	13%	10%
Video streaming services	6%	10%
Deal-based promotion	6%	8%
Magazine	10%	6%
Email/e-newsletter	7%	6%
Billboard	5%	5%
Music streaming services	1%	5%
Radio	7%	4%
Newspaper	8%	4%
Brochure	4%	2%
AAA	4%	2%
Podcasts	2%	1%
Other	3%	2%

[1]Multiple responses permitted.
[2]Base: 35% of visitors who recalled seeing a promotion.
[3]Base: 39% of visitors who recalled seeing a promotion.

PRE-VISIT

Characteristics influencing decision to visit Lee County (top 2 boxes)[1]	Oct - Dec 2024	Oct - Dec 2025
Warm weather	89%	86%
Peaceful/relaxing	88%	84%
A safe destination	84%	82%
White sandy beaches	79%	78%
Convenient location	77%	78%
Clean, unspoiled environment	77%	77%
Plenty to see and do	78%	75%
A "family" atmosphere	75%	73%
Value for your travel dollar	72%	70%
Memories of visiting/nostalgia	72%	70%
Reasonably priced lodging	68%	68%

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

PRE-VISIT

Main Reason for Visiting[1]	Oct - Dec 2024	Oct - Dec 2025
Relax & unwind	45%	55%
Visiting friends & relatives	41%	42%
Beach	33%	38%
Shopping	10%	14%
Part-time resident ("Snowbird")	15%	13%
Nature, environment, bird watching	7%	12%
Special occasion	13%	9%
Attractions	7%	9%
Golf or tennis	11%	9%
Checking-in on my property	15%	7%
Sporting event	8%	5%
Fishing	10%	5%
Special event	7%	4%
Water sports	5%	4%
Business meetings/conferences	5%	3%
Biking, hiking	2%	2%
Photography	3%	2%
Volunteering	3%	2%
Culture	1%	1%
Museums, history	1%	1%
Diving, snorkeling	1%	1%
Guided tours	2%	1%
Work-related hurricane recovery	2%	1%
Other	2%	1%

[1]Multiple responses permitted.

PRE-VISIT

Transportation	Oct - Dec 2024	Oct - Dec 2025
Fly	71%	61%
Drive a personal vehicle	24%	26%
Drive a rental vehicle	3%	11%
Drive an RV	1%	1%
Travel by bus	<1%	<1%
Other	1%	1%

Airport Used	Oct - Dec 2024	Oct - Dec 2025
Southwest Florida International	75%	80%
Punta Gorda	8%	9%
Miami International	9%	5%
Orlando International	1%	3%
Ft. Lauderdale International	4%	2%
Tampa International	3%	1%
Other	0%	0%

TRAVEL PARTY PROFILE

Visitor Origin[1]	Oct - Dec 2024	Oct - Dec 2025
Florida	8.6%	8.1%
Southeast	19.4%	19.1%
Northeast	19.7%	21.1%
Midwest	30.0%	32.4%
West	9.0%	8.4%
Canada	6.7%	5.1%
Germany	3.1%	2.7%
United Kingdom	1.4%	1.2%
Other Europe	1.0%	0.9%
Other International	1.1%	1.0%

Visitor Origin[1]	Oct - Dec 2024	Oct - Dec 2025
New York City	4.8%	5.2%
Chicago	5.9%	5.2%
Minneapolis-St. Paul	3.0%	3.9%
Detroit	3.5%	3.7%
Atlanta	4.5%	3.5%
Boston	2.9%	3.1%
Philadelphia	3.4%	2.7%
Washington, DC-Hagerstown	2.8%	2.6%
Cleveland-Akron	1.9%	2.5%
Columbus, OH	1.5%	2.2%
Denver	2.6%	1.9%
Miami-Ft. Lauderdale	2.7%	1.9%
Pittsburgh	1.6%	1.8%
Dallas-Ft. Worth	1.1%	1.7%
Tampa-St. Petersburg	1.1%	1.7%
Milwaukee	1.4%	1.5%
Nashville	1.1%	1.5%

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

TRAVEL PARTY PROFILE

Travel Parties	Oct - Dec 2024	Oct - Dec 2025
Mean travel party size[1]	3.0	2.8
Travel with children under age 18	36%	26%

Travel Party Composition	Oct - Dec 2024	Oct - Dec 2025
As a couple	36%	41%
As a family	38%	33%
By yourself	16%	15%
With other couples/friends	6%	8%
With business associates	3%	2%
In a tour group	<1%	<1%
Other	1%	1%

[1]Sources: Occupancy Study and Visitor Tracking Study

TRAVEL PARTY PROFILE

Marital Status	Oct - Dec 2024	Oct - Dec 2025
Married/Domestic Partnership	80%	75%
Single	20%	25%

Age	Oct - Dec 2024	Oct - Dec 2025
Average age	51	51
Median age	51	51

Household Income	Oct - Dec 2024	Oct - Dec 2025
Median Income	$108,700	$115,000

TRAVEL PARTY PROFILE

Race/Ethnicity	Oct - Dec 2024	Oct - Dec 2025
Caucasian/White	78%	80%
Hispanic or Latino/Latina/Latinx	14%	10%
African American/Black	4%	5%
Asian/Asian American/Pacific Islander	2%	3%
Middle Eastern/Northern African	1%	1%
Another race/ethnicity	1%	1%

Gender[1]	Oct - Dec 2024	Oct - Dec 2025
Male	50%	47%
Female	50%	53%
Non-binary	<1%	<1%

[1]Of person interviewed.

TRIP EXPERIENCE

Length of Stay[1]	Oct - Dec 2024	Oct - Dec 2025
Average nights in the Fort Myers area	6.2	6.3

First Time/Repeat Visitors	Oct - Dec 2024	Oct - Dec 2025
First-time	21%	18%
Repeat	79%	82%

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

TRIP EXPERIENCE

Type of Accommodations	Oct - Dec 2024	Oct - Dec 2025
Hotel/motel/resort	36%	38%
Vacation rental home	24%	24%
Friends/family home	15%	16%
Personal condo, house, timeshare, etc.	19%	14%
Bed & Breakfast/Inn	2%	2%
Campground/RV Park	2%	1%
Other Accommodations	1%	1%
Not Spending the Night	1%	4%

TRIP EXPERIENCE

Activities[1]	Oct - Dec 2024	Oct - Dec 2025
Relax and unwind	63%	71%
Restaurants	64%	71%
Beach	53%	58%
Visit friends/relatives	48%	52%
Shopping	45%	50%
Nature, environment, bird watching	19%	29%
Attractions	14%	19%
Bars, nightclubs	16%	18%
Golf, tennis, or pickleball	21%	18%
Fishing	27%	15%
Water sports	16%	13%
Biking, hiking	14%	11%
Special occasion	11%	9%
Photography	10%	8%
Special events	8%	7%
Museums, history	7%	7%
Attend or participate in a sporting event	8%	6%
Culture	9%	6%
Guided tours	7%	6%
Spas	9%	5%
Diving, snorkeling	8%	5%
Business meetings/conferences	5%	3%
Volunteering	4%	3%
Other	1%	1%

[1]Multiple responses permitted.

TRIP EXPERIENCE

Attractions[1]	Oct - Dec 2024	Oct - Dec 2025
Beaches	54%	58%
Miromar Outlets Mall	20%	27%
Sanibel Lighthouse	25%	27%
Gulf Coast Town Center	21%	24%
Edison & Ford Winter Estates	23%	23%
Bell Tower Shops	24%	22%
Coconut Point Mall	20%	20%
Fort Myers Beach Pier [2]	14%	16%
J.N. Ding Darling National Wildlife Refuge	7%	7%
Manatee Park	6%	6%
Broadway Palm Dinner Theater	5%	5%
Bailey-Matthews Shell Museum	8%	4%
Barbara B. Mann Performing Arts Hall	3%	3%
Periwinkle Place	2%	2%
Other	3%	3%
None	17%	12%

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

TRIP EXPERIENCE

Area stayed	Oct - Dec 2024	Oct - Dec 2025
Fort Myers	38%	36%
Fort Myers Beach	12%	13%
Cape Coral	16%	12%
Bonita Springs	9%	10%
Sanibel Island	7%	8%
Estero	8%	7%
North Fort Myers	3%	4%
Captiva Island	2%	2%
Lehigh Acres	1%	1%
Pine Island	1%	1%
Boca Grande/Outer Islands	1%	1%
Along I-75	1%	1%
None/not staying overnight	1%	4%

POST-TRIP EVALUATION

Likelihood of Recommending the Area	Oct - Dec 2024	Oct - Dec 2025
Very Likely	45%	54%
Likely	47%	41%
Unsure/don't know	6%	4%
Unlikely	1%	1%
Very Unlikely	1%	<1%

Likelihood of Returning to the Area	Oct - Dec 2024	Oct - Dec 2025
Very Likely	50%	60%
Likely	38%	33%
Unsure/don't know	10%	6%
Unlikely	1%	1%
Very Unlikely	1%	<1%

Likelihood of Returning Next Year	Oct - Dec 2024	Oct - Dec 2025
Very Likely	48%	56%
Likely	21%	18%
Unsure/don't know	29%	22%
Unlikely	1%	3%
Very Unlikely	1%	1%

POST-TRIP EVALUATION

Satisfaction with Accommodations	Oct - Dec 2024	Oct - Dec 2025
Exceeded expectations	43%	49%
Met expectations	54%	49%
Did not meet expectations	3%	2%

POST-TRIP EVALUATION

Satisfaction with Visit	Oct - Dec 2024	Oct - Dec 2025
Very satisfied	51%	61%
Satisfied	43%	36%
Somewhat satisfied	4%	2%
Dissatisfied	1%	<1%
Very dissatisfied	<1%	<1%
Don't know/no opinion	1%	1%

Satisfaction with Customer Service	Oct - Dec 2024	Oct - Dec 2025
Very satisfied	53%	60%
Satisfied	40%	36%
Somewhat satisfied	4%	3%
Dissatisfied	1%	<1%
Very dissatisfied	<1%	<1%
Don't know/no opinion	2%	1%

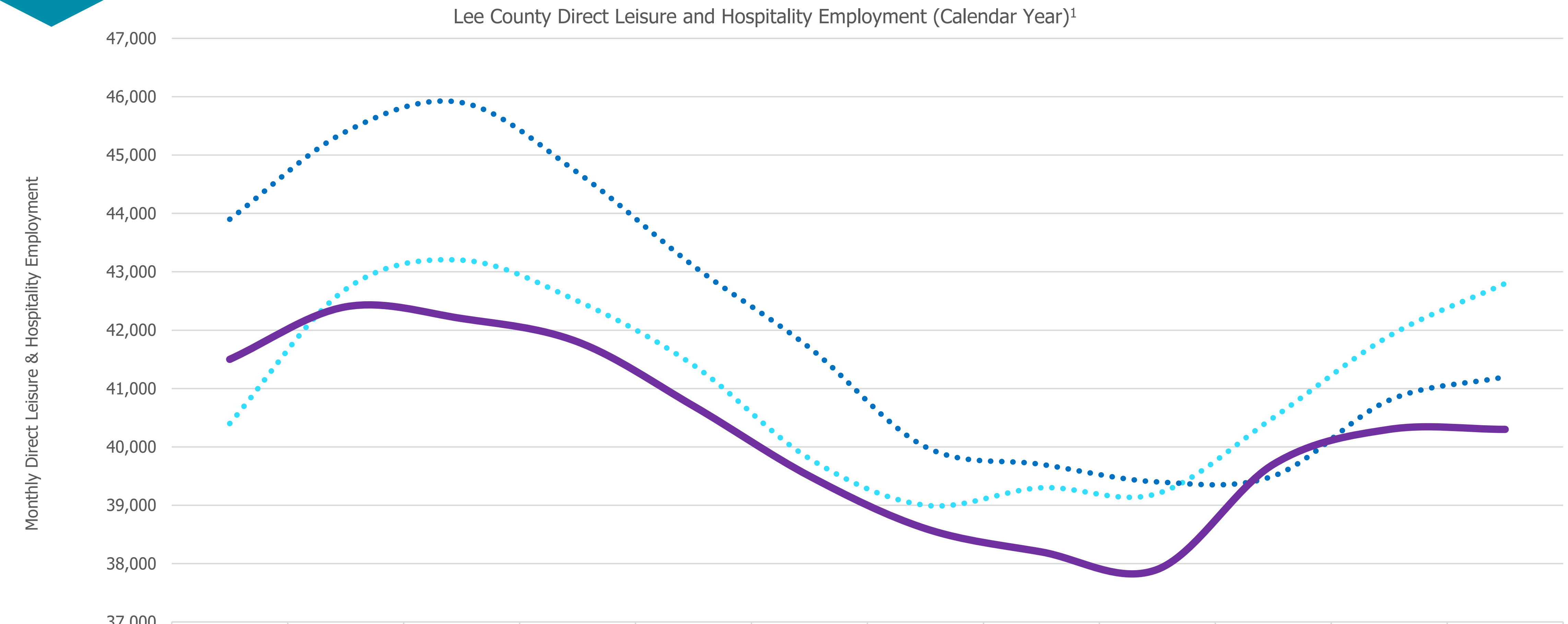
POST-TRIP EVALUATION

Visitor Concerns[1]	Oct - Dec 2024	Oct - Dec 2025
Traffic	31%	26%
High Prices	20%	13%
Insects	12%	12%
Damaged buildings, signs, and landscapes	15%	11%
Construction noise/activity	14%	9%
Water quality	7%	5%
Weather	5%	4%
Beach seaweed	4%	4%
Lack of nightlife	5%	4%
Red tide	5%	3%
Quality of accommodations	3%	2%
Other	1%	2%
Nothing	24%	42%

[1]Multiple responses permitted.

Industry Data

LEISURE & HOSPITALTY EMPLOYMENT



	January	February	March	April	May	June	July	August	September	October	November	December
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	38,600	38,200	37,900	39,700	40,300	40,300 (P)

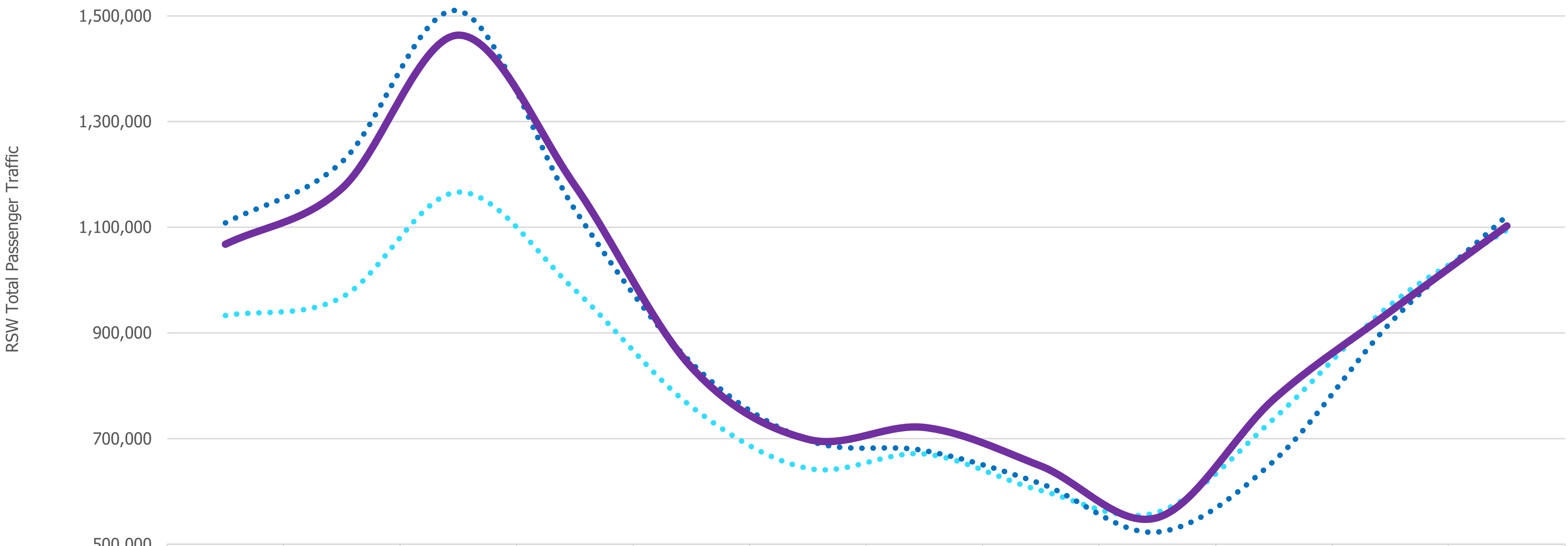
[1] SOURCE: Current Employment Statistic Program (CES), Lee County Leisure and Hospitality Sector, not seasonally adjusted.
(P) Preliminary.

Fort Myers Islands, Beaches & Neighborhoods

downs & st. germain RESEARCH

RSW TOTAL PASSENGER TRAFFIC

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

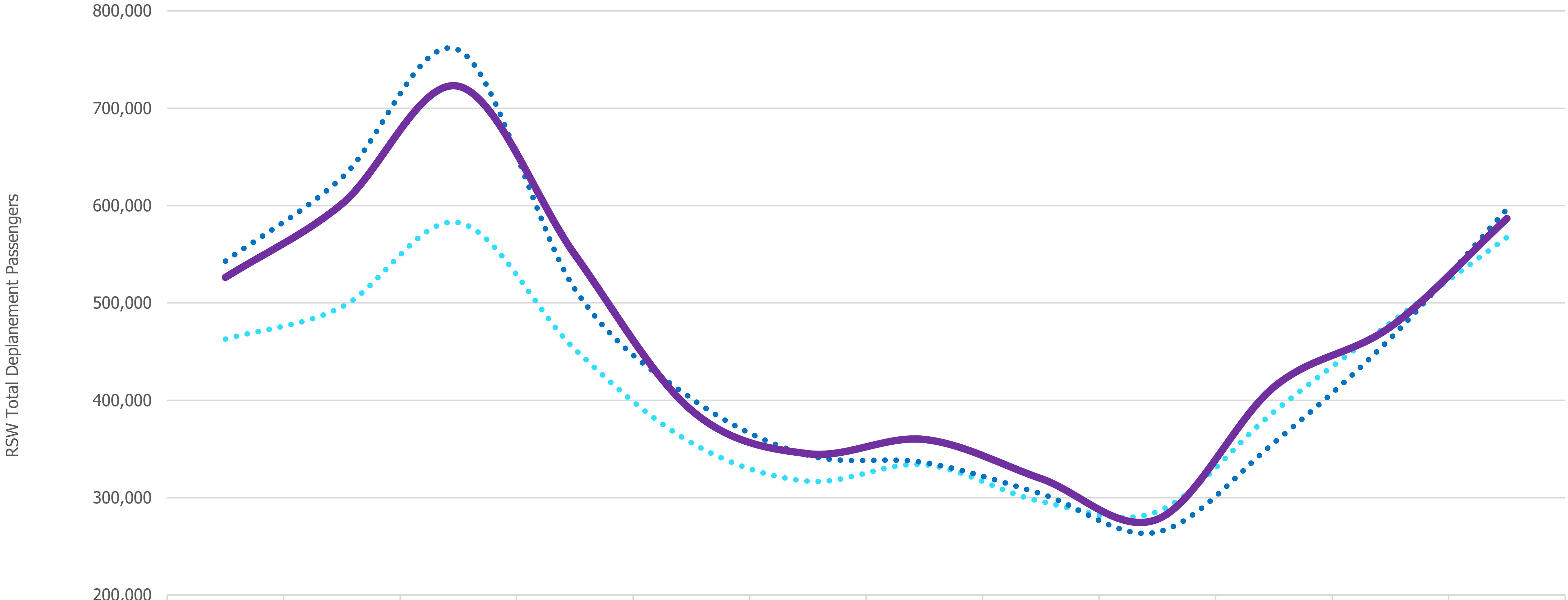


	January	February	March	April	May	June	July	August	September	October	November	December
2023	932,896	967,416	1,166,442	981,216	760,330	643,486	670,818	601,542	560,358	737,527	953,025	1,094,783
2024	1,108,190	1,223,761	1,509,777	1,133,256	843,270	696,867	677,137	614,531	523,004	657,488	919,108	1,121,793
2025	1,067,794	1,173,638	1,463,628	1,178,980	834,862	698,573	720,973	647,917	550,259	774,689	940,689	1,102,456

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

RSW DEPLANEMENT PASSENGERS

Southwest Florida International Airport (RSW) Deplanement Passengers[1]

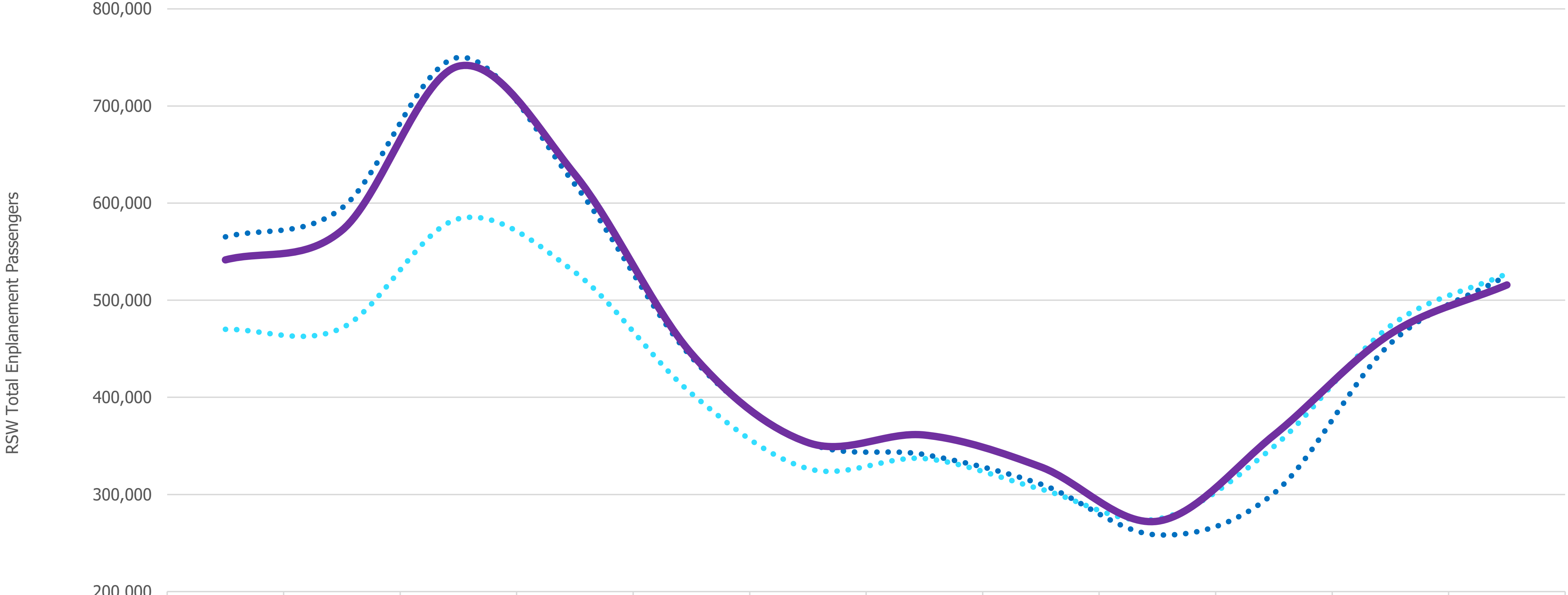


	January	February	March	April	May	June	July	August	September	October	November	December
2023	462,851	495,943	582,580	452,356	356,361	316,887	333,862	296,092	285,679	388,153	479,404	567,439
2024	542,929	628,786	759,836	514,166	401,868	343,614	336,069	303,982	264,625	356,316	463,688	596,290
2025	526,231	601,672	722,642	549,572	389,793	345,133	359,761	319,590	277,820	413,639	475,420	586,707

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

RSW ENPLANEMENT PASSENGERS

Southwest Florida International Airport (RSW) Enplanement Passengers[1]



	January	February	March	April	May	June	July	August	September	October	November	December
2023	470,045	471,473	583,862	528,860	403,969	326,599	336,956	305,450	274,679	349,374	473,621	527,344
2024	565,261	594,975	749,941	619,090	441,402	353,253	341,068	310,549	258,379	301,172	455,420	525,503
2025	541,563	571,966	740,986	629,408	445,069	353,440	361,212	328,327	272,439	361,050	465,269	515,749

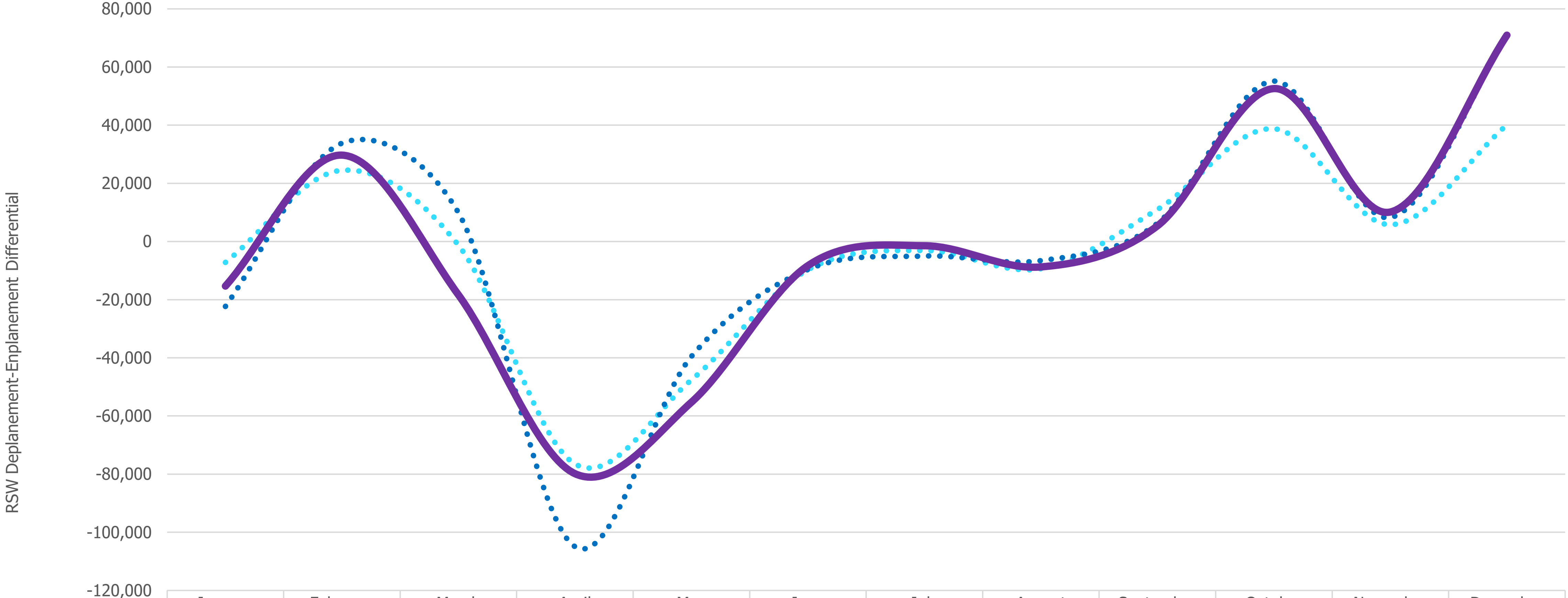
[1] SOURCE: Lee County Port Authority Monthly Statistics.

fort MYERS
ISLANDS, BEACHES & NEIGHBORHOODS

downs & st. germain
RESEARCH

RSW DEPLANEMENT-ENPLANEMENT DIFFERENTIAL

Southwest Florida International Airport (RSW) Deplanement-Enplanement Differential[1]



	January	February	March	April	May	June	July	August	September	October	November	December
2023	-7,194	24,470	-1,282	-76,504	-47,608	-9,712	-3,094	-9,358	11,000	38,779	5,783	40,095
2024	-22,332	33,811	9,895	-104,924	-39,534	-9,639	-4,999	-6,567	6,246	55,144	8,268	70,787
2025	-15,332	29,706	-18,344	-79,836	-55,276	-8,307	-1,451	-8,737	5,381	52,589	10,151	70,958

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

LICENSED TRANSIENT RENTAL UNITS

Licensed Transient Rental Units in Lee County, as of January 2026[1]					
Lee County Area	**Hotel**	**Motel**	**Bed & Breakfast**	**Vacation Rental**	**Total**
Fort Myers	6,102	1,069	9	548	7,728
Cape Coral	584	192	1	3,147	3,924
Fort Myers Beach	861	386	6	2,380	3,633
Sanibel	68	688	0	1,588	2,344
Bonita Springs	1,244	38	0	762	2,044
North Fort Myers	0	578	0	82	660
Estero	566	0	0	29	595
Captiva	107	156	0	242	505
Boca Grande	77	107	0	287	471
Lehigh Acres	75	0	0	189	264
Saint James City	0	20	0	76	96
Bokeelia	0	31	0	30	61
Matlacha	0	0	2	27	29
Cabbage Key	0	9	0	0	9
Alva	0	0	0	3	3
Miromar Lakes	0	0	0	1	1
Total	**9,684**	**3,274**	**18**	**9,391**	**22,367**[2]

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

Methodology

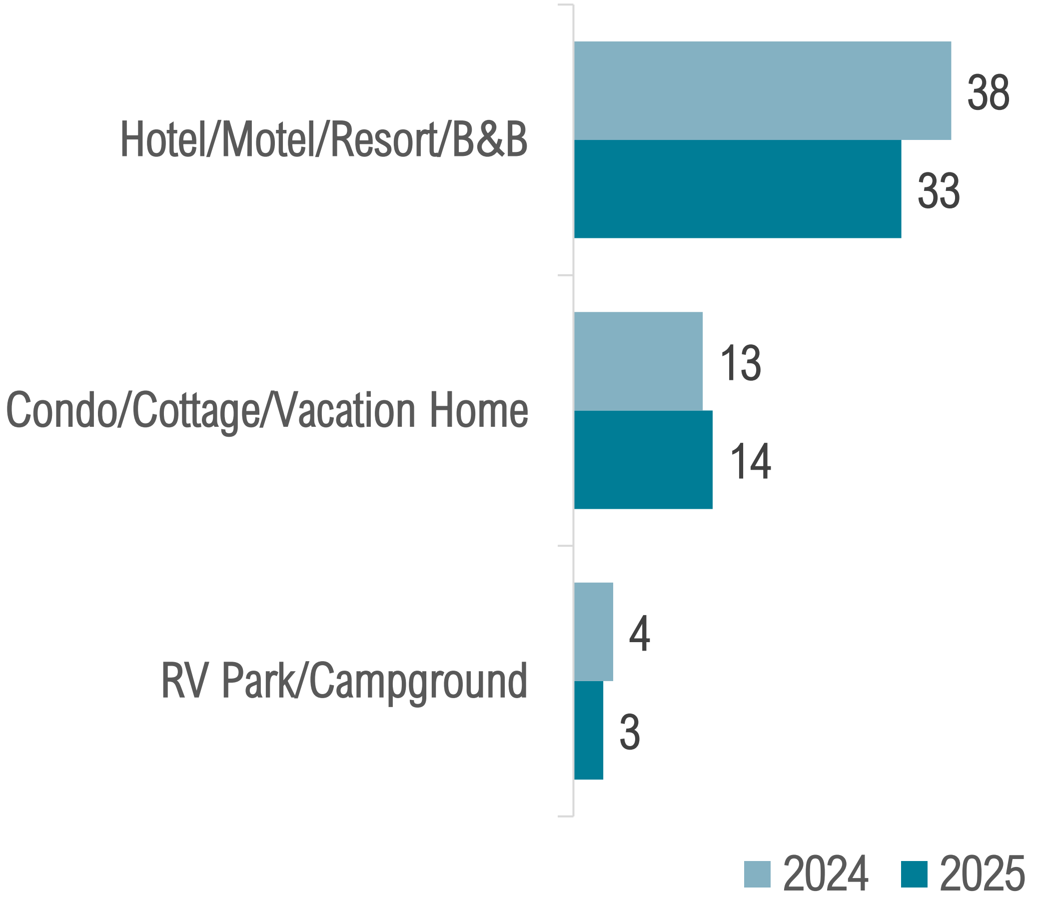
METHODOLOGY

- Economic Impact of tourism in Lee County is derived from:
  - Visitor Tracking Study
    - 930 surveys in public areas, hotels, at events around Lee County, and online via email or social media
    - Target individuals: October - December visitors to Lee County
    - Data Collection: October - December 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 4,630 hotel/rental/campground units (50 properties) reporting to DSG, 10,802 hotel units reporting to STR (89 properties), and 3,798 rental units (164 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

- Occupancy Study
  - Internet and telephone survey of hotels, rental management companies, RV/campgrounds, etc.
    - Sample Size: 50 completed surveys
    - Data Collection: Completed in January 2026 (for October - December 2025)
  - Total Sample Size:
    - Data from 4,630 hotel/rental/campground units reporting to DSG (representing 50 properties)
    - Data from 10,802 hotel units reporting to STR (representing 89 properties)
    - Data from 3,798 rental units reporting to KeyData (representing 164 property managers)

Number of Complete Responses



Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

October - December 2025

Visitor Tracking, Occupancy, & Economic Impact Study

Tamara Pigott, CDME
Executive Director

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