Fort Myers - Islands, Beaches and Neighborhoods

Lee County VCB

July - September 2026

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
- 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
- Area stayed

Post-Trip Evaluation

- Likelihood of recommending
- Likelihood of returning
- Satisfaction
- Quality of accommodations
- Least-liked features
- 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]



895,500

Total Visitors

+ 17.4%



1,075,000

Room Nights

+ 13.8%



$738,672,400

Direct Spending

+ 14.8%



$978,244,500

Total Economic Impact

+ 18.9%

[1]Sources: DBPR, Smith Travel Research, Key Data, DSG Occupancy Study, and DSG Visitor Tracking Study

LODGING METRICS[1]

HOTELS + VACATION RENTALS + CAMPGROUNDS



47.5%

Occupancy

+ 5.0%



$148.83

Average Daily Rate

+ 6.4%



$70.74

Revenue Per Available Room

+ 11.7%

HOTELS[1]



52.4%

Occupancy

+ 3.8%



$133.51

Average Daily Rate

- 0.1%



$69.96

Revenue Per Available Room

+ 3.7%

VACATION RENTALS[2]



32.3%

Occupancy

+ 11.0%



$255.13

Average Daily Rate

+ 18.9%



$82.41

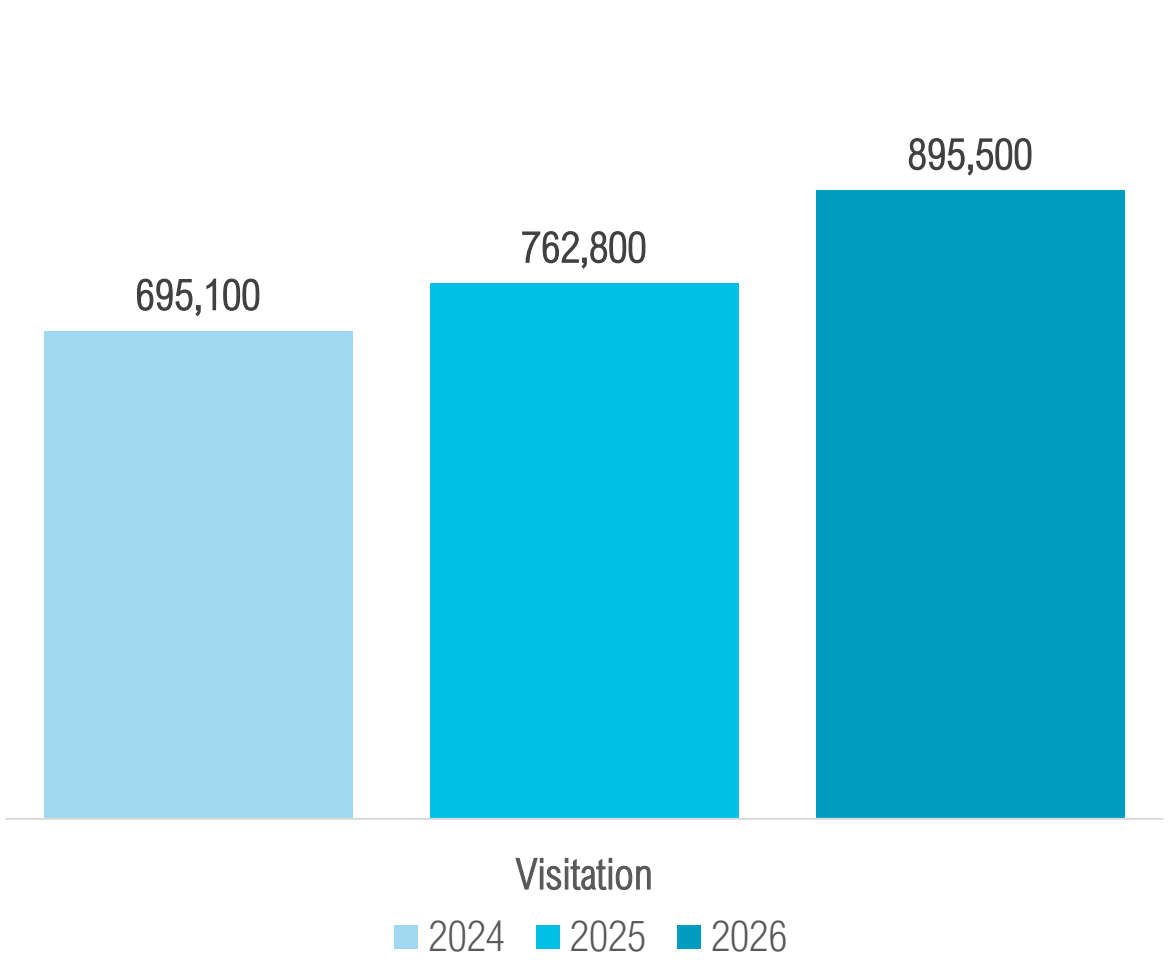
Revenue Per Available Room

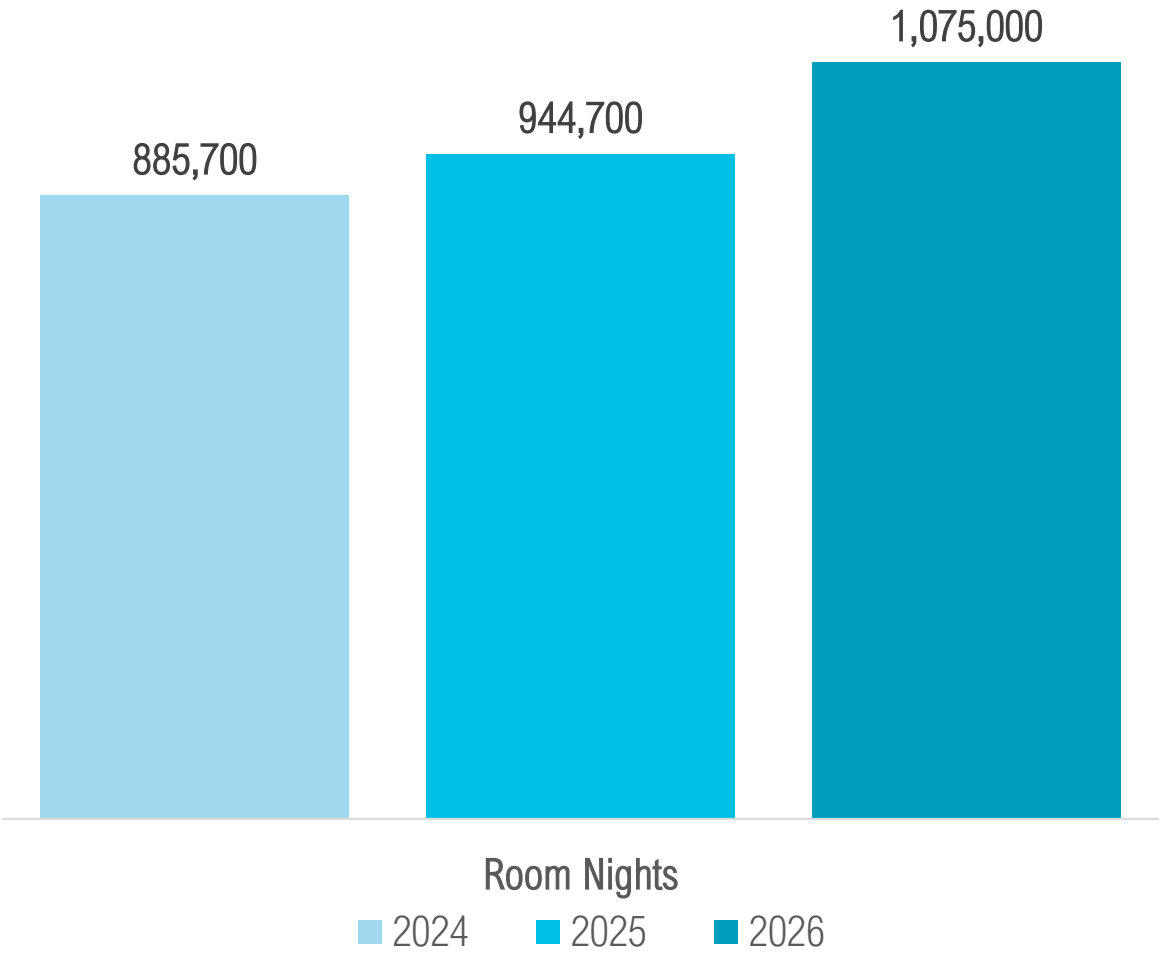
+ 32.0%

[1]Hotel sources: Smith Travel Research & DSG Occupancy Study

[2]Vacation rental sources: DBPR, Key Data & DSG Occupancy Study

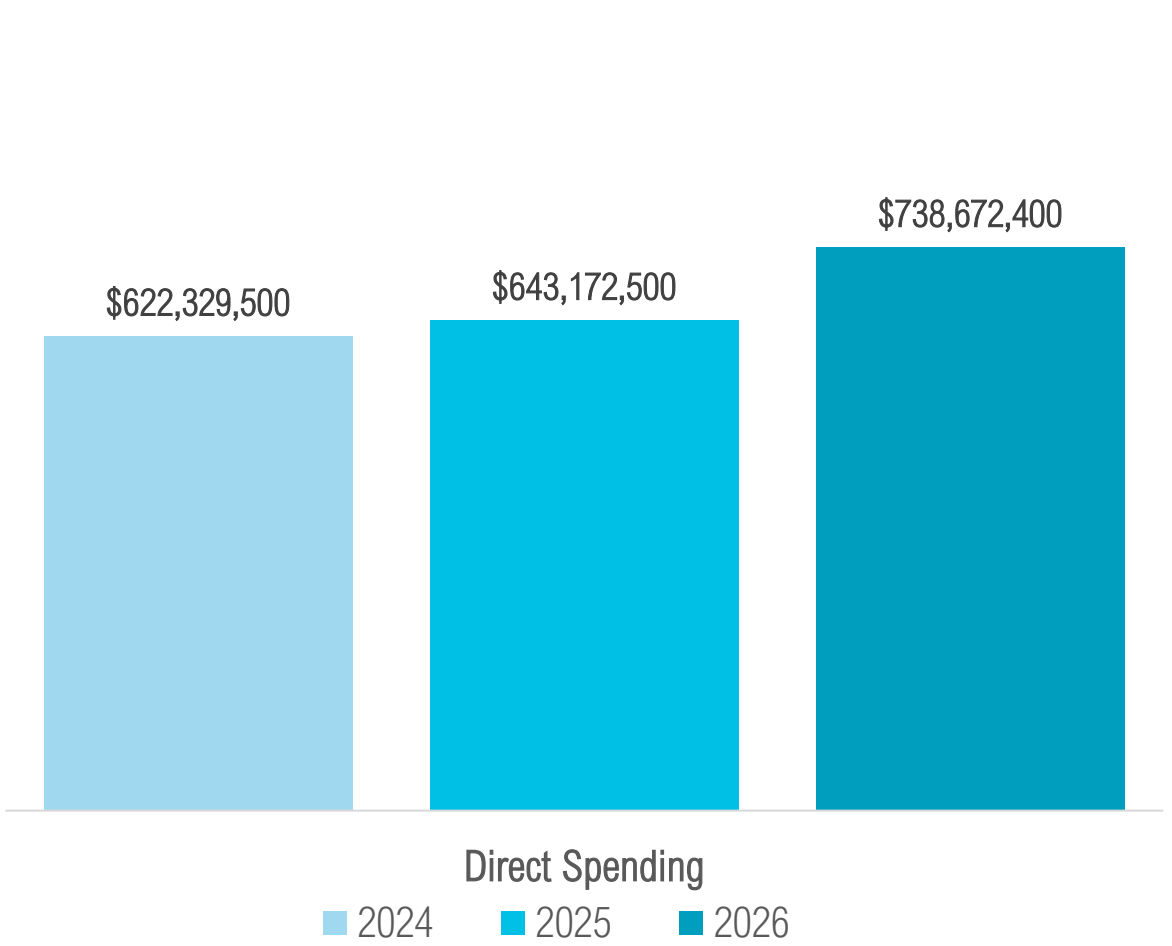
VISITATION & ROOM NIGHTS[1]

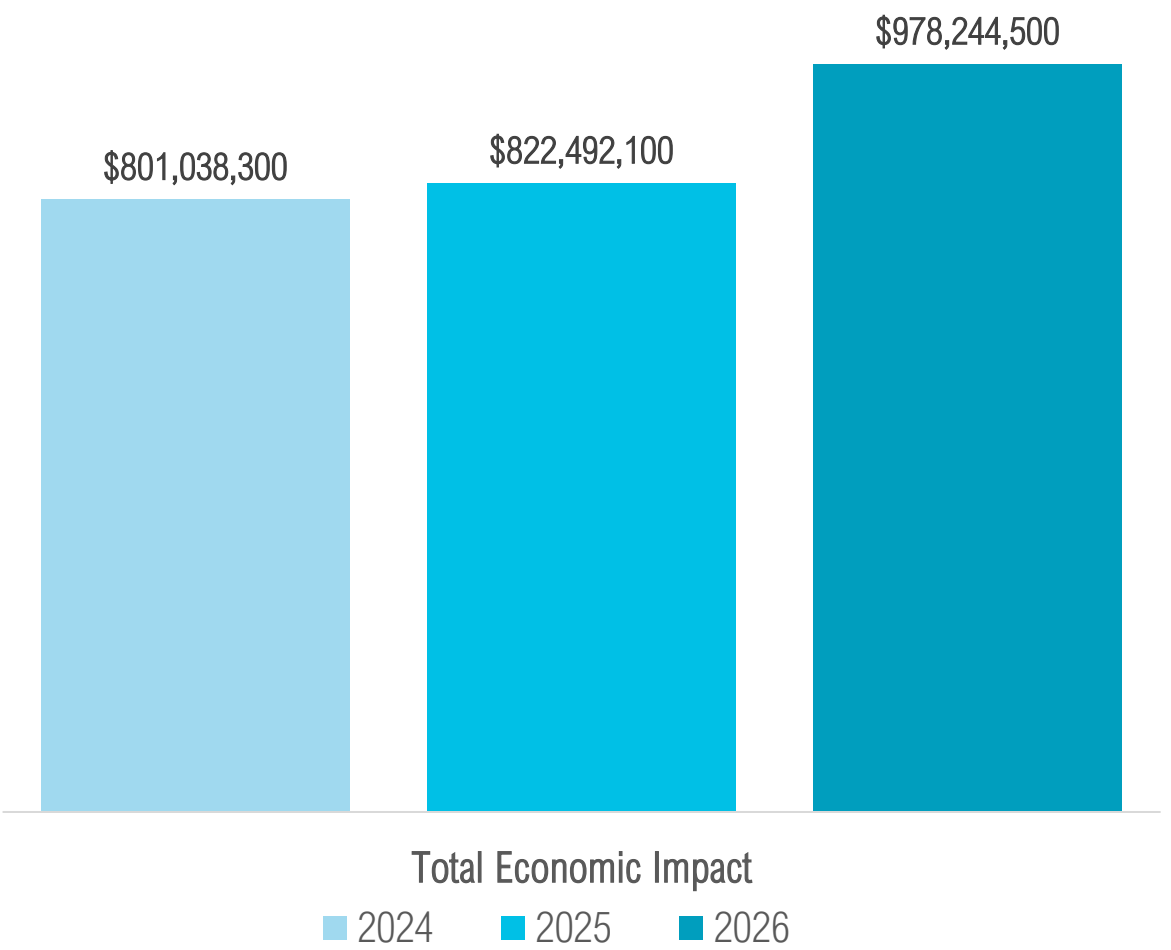




[1]Sources: STR, Key Data, & DSG Occupancy Study

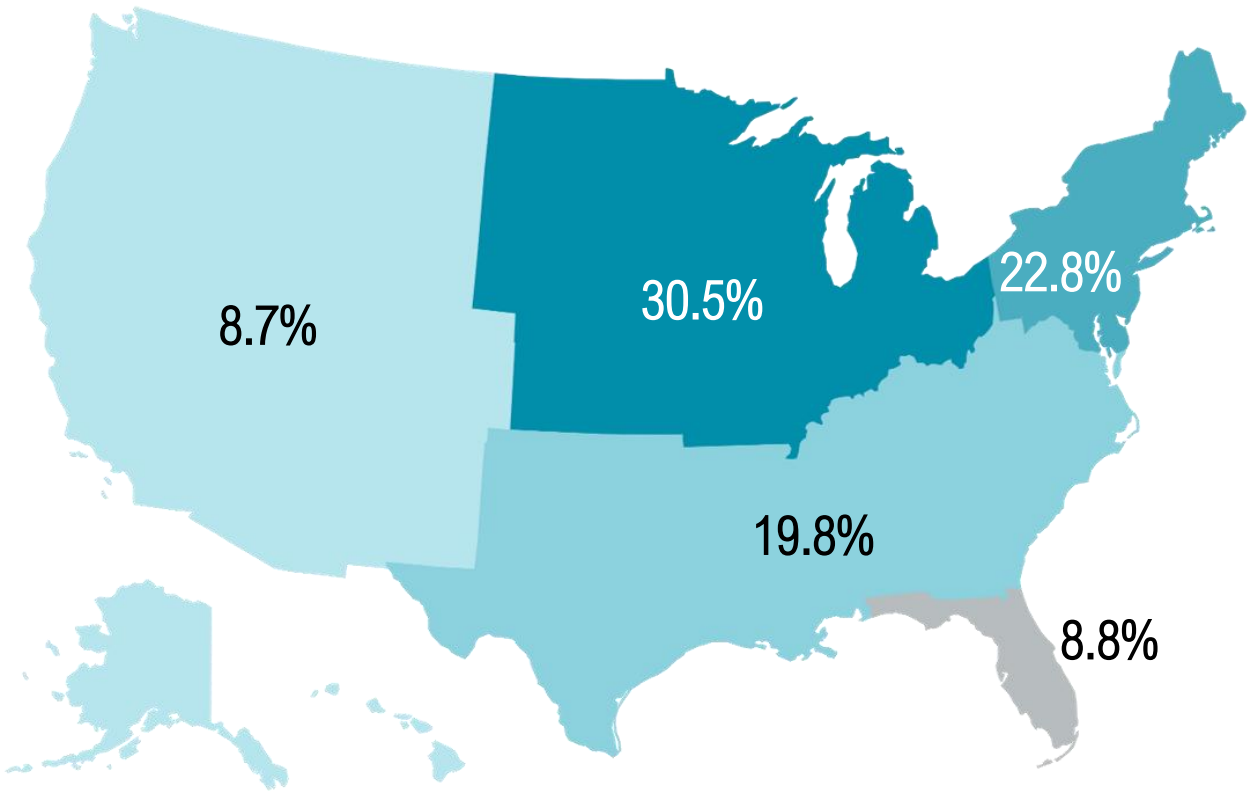
SPENDING & ECONOMIC IMPACT[1]





[1]Sources: STR, Key Data, & DSG Occupancy Study

VISITOR ORIGINS



Domestic Origin Regions	Percent
Florida	8.8%
Southeast	19.8%
Northeast	22.8%
Midwest	30.5%
West	8.7%

International Origins	Percent
Canada	4.0%
UK	0.9%
Germany	2.3%
Other Europe	1.1%
Other International	1.1%

Top Origin Markets[1,2]	Percent
New York City	5.9%
Chicago	5.1%
Atlanta	3.7%
Cleveland-Akron	3.5%
Philadelphia	3.4%
Denver	2.7%
Indianapolis	2.4%
Cincinnati	2.2%
Boston	2.1%
Miami-Fort Lauderdale	2.0%
Washington, DC-Hagerstown	1.8%
Dallas-Fort Worth	1.8%
Minneapolis-St. Paul	1.7%
Detroit	1.6%
Nashville	1.6%
Pittsburgh	1.6%
Tampa-St. Petersburg	1.5%
St. Louis	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 as 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 Washington DC itself and including large portions of MD, VA, as well as some areas of WV.

VISITOR PROFILE



52
Median Age

21%
First-Time Visitor

$125,000
Median Household Income

29%
Traveled with Children

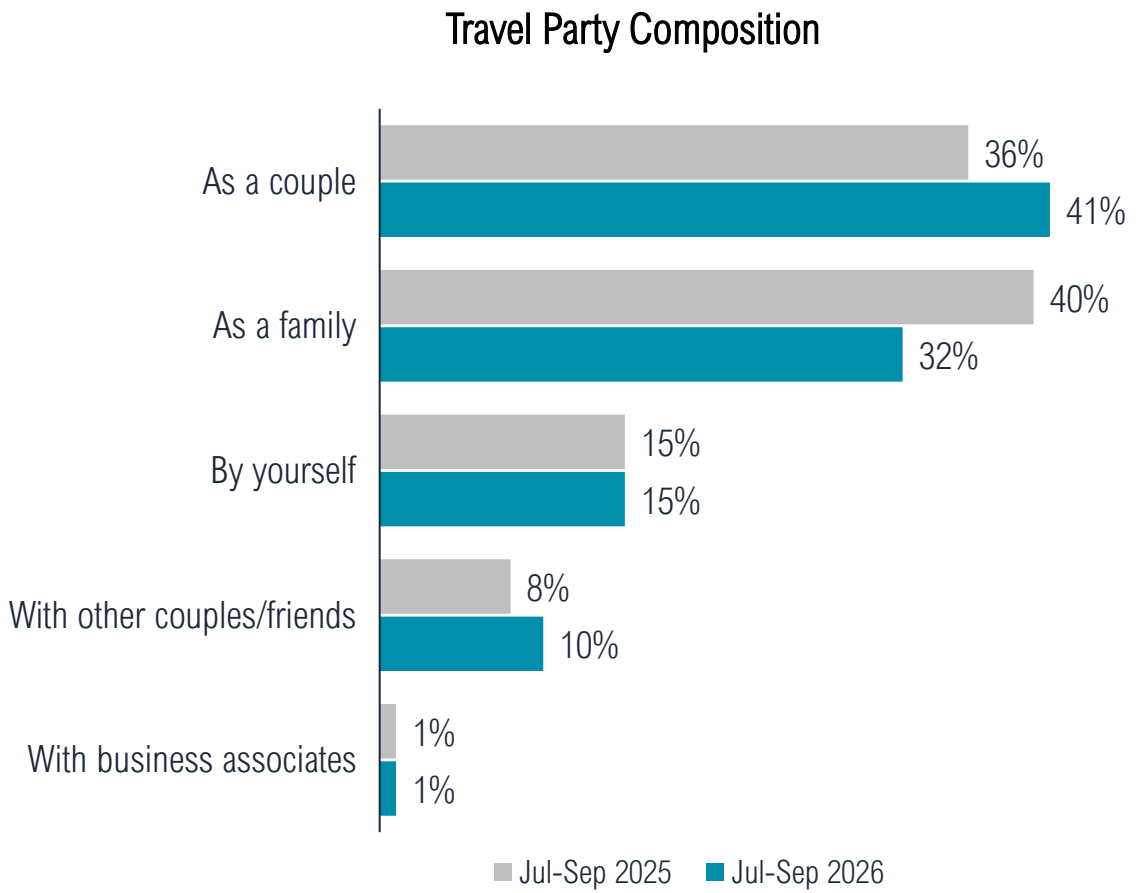
2.7
Travel Party Size

5.8
Length of Stay

SHIFT IN TRAVEL PARTIES

- **Data Point:** 29% of visitors traveled with children, down from 36% in 2025. Couples rose to 41% of travel parties (was 36%) and families fell to 32% (was 40%).

- **Insight:** The typical visitor is now an older, higher-income couple (median age 52, was 48; income $125,000, was $111,100). Family atmosphere also mattered less (65%, was 76%) as adult getaways outpaced traditional family travel this quarter.

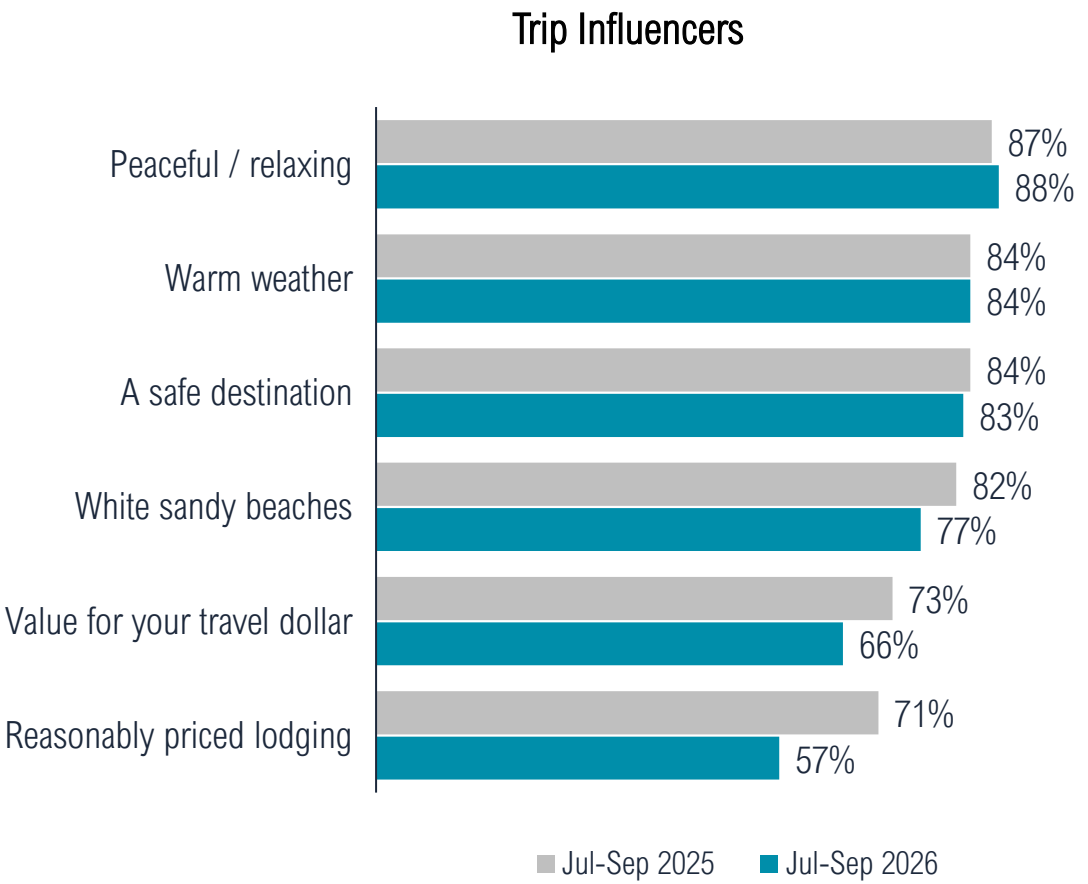


Source: Visitor Tracking Study. Tour group and other parties (1% or less) not shown.

VALUE AND PRICE[1]

- **Data Point:** 57% of visitors said reasonably priced lodging influenced their trip, down from 71% in 2025, the largest drop of any trip influencer. Value for the travel dollar fell from 73% to 66%.

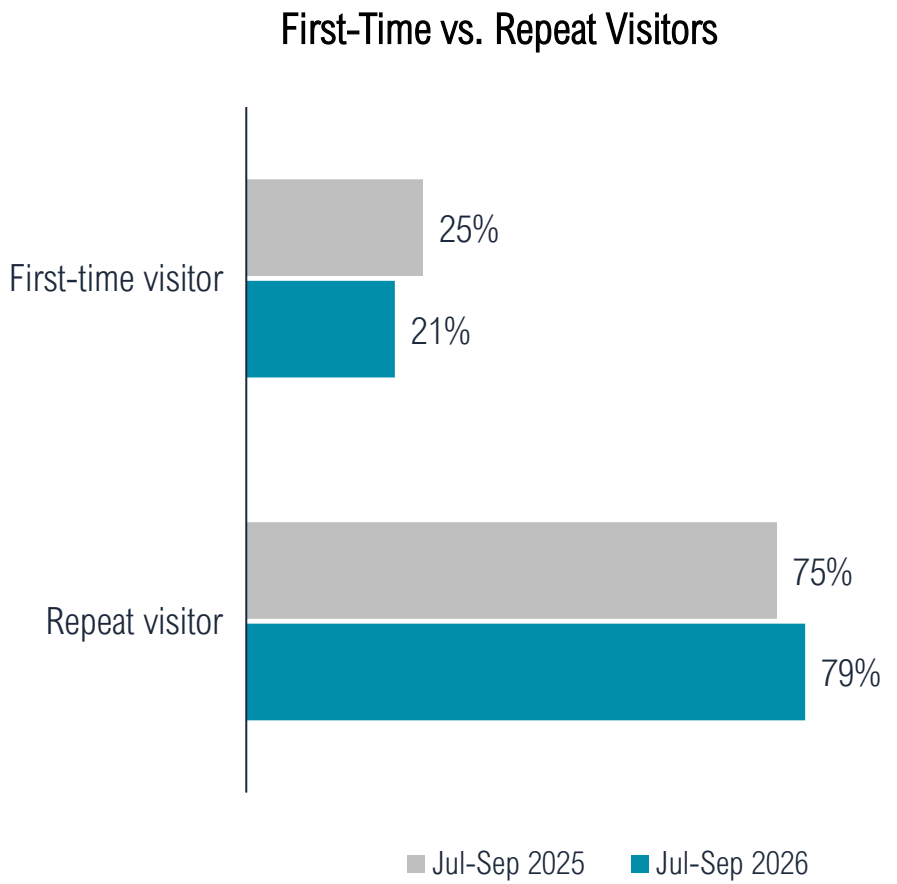
- **Insight:** Price is a weaker draw as vacation rental rates climb (ADR +18.9%). More visitors compared other destinations (51%, was 32%) and booked directly with the property (52%, was 41%).



[1]Top 2 box scores on a 1 to 5 scale. Selected attributes shown.

RETURN OF REPEAT & LOYAL VISITORS

- **Data Point:** 79% of visitors to the Fort Myers area were repeat visitors (was 75% in 2025).
- **Insight:** Repeat visitors are the area's most committed guests. 75% are "extremely likely" to return, compared with 41% of first-time visitors.

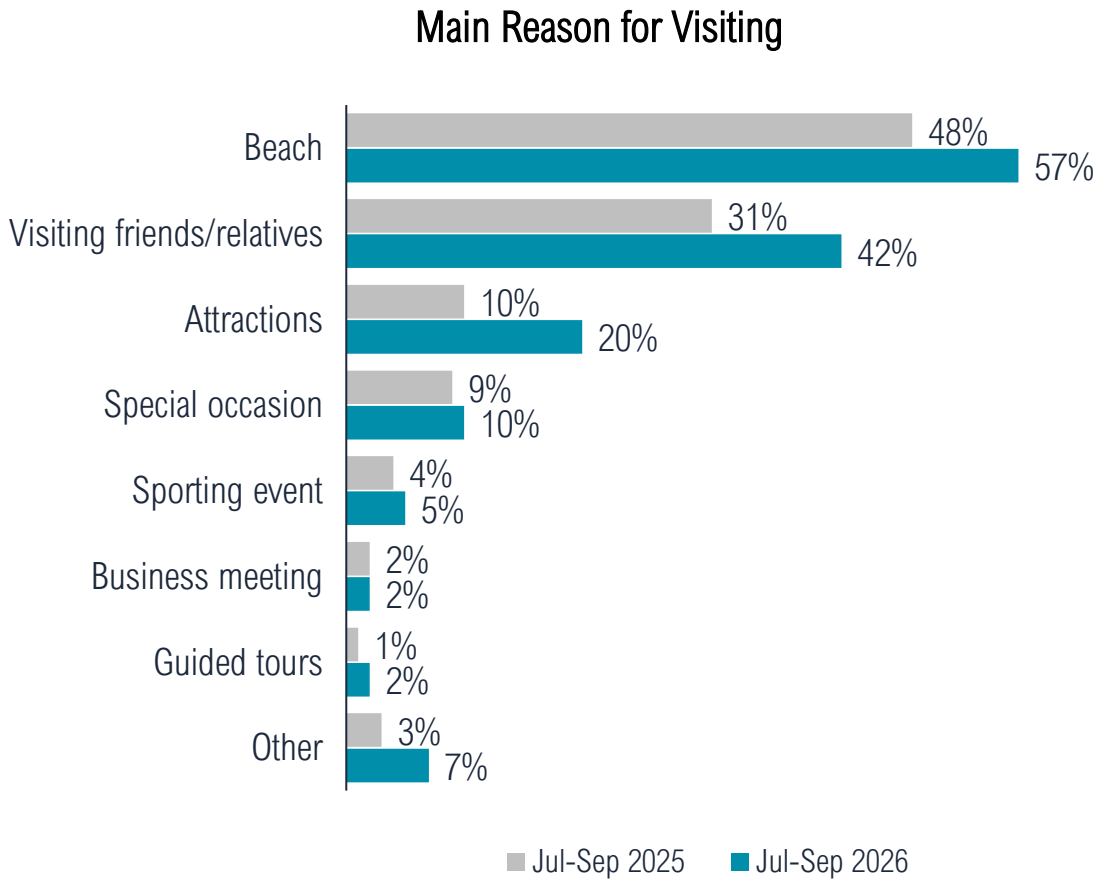


[1]The format of this survey question changed in 2026.

REASON FOR VISITING[1,2]

- **Data Point:** 57% of visitors came for the beach (vs. 48% in 2025), while 42% came to visit friends/relatives (vs. 31% in 2025). The share of visitors coming for attractions (20%) was also higher compared to 2025 (10%).

- **Insight:** Vacation and leisure visitation continues to grow as areas affected by past hurricanes return to normal.

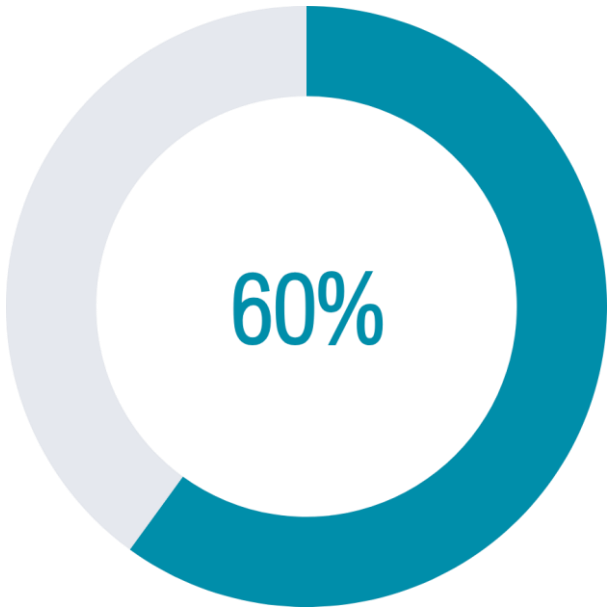


[1]Three responses permitted.

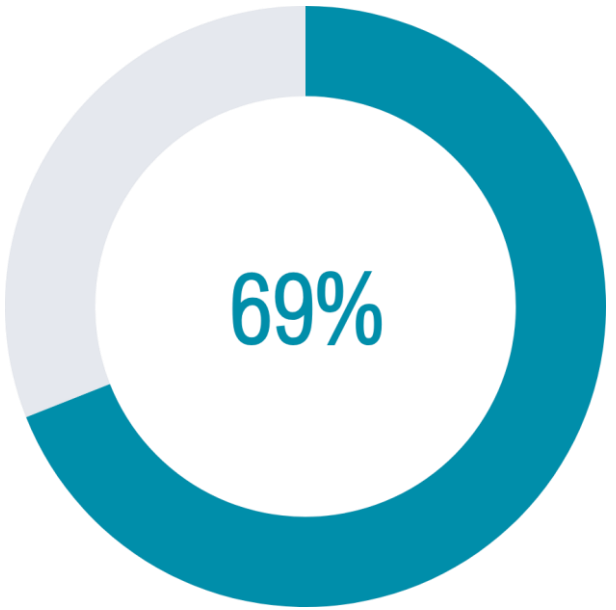
[2]Format changed in 2026; non-comparable reasons not shown.

SATISFACTION STATISTICS

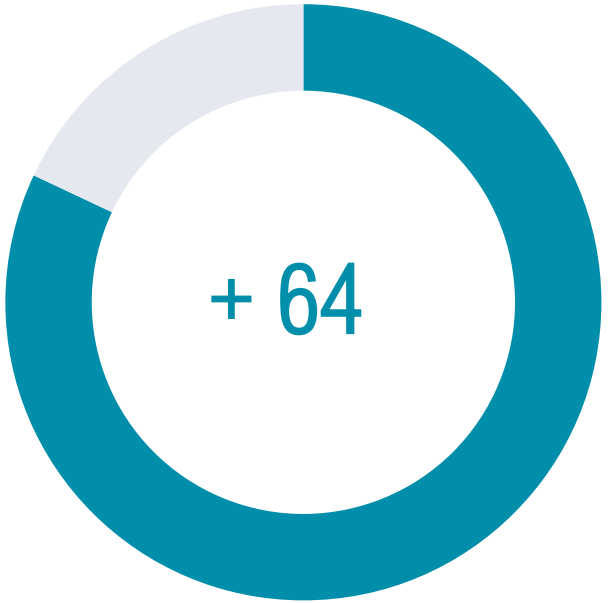
Overall satisfaction, intention to return, and likelihood of recommending the area remain high.



Completely satisfied
with their visit to Fort Myers



Extremely likely to return
to the Fort Myers area



Net Promoter Score[1]
for the Fort Myers area

[1]Net Promoter Score is determined by subtracting the percentage of visitors who rated their likelihood of recommending the area 1-6 (out of 10) from the percentage of visitors who rated a 9 or 10. The highest possible score is 100, and the lowest possible score is -100.

SELECTED VISITOR QUOTES ABOUT THE FORT MYERS AREA[1]



- "As pretty as most Caribbean islands with better cultural attractions and tourism infrastructure for people who don't want to just plop down on the beach at an all-inclusive."
- "Lovely, a piece of heaven."
- "You will love Fort Myers. It has everything to offer from small families to large families to single people. The restaurants are amazing. The beach is beautiful and easy to get to. Great small-town feel. I highly recommend everyone coming to visit."
- "I would describe Fort Myers as my secret getaway, and I would love for my friends to come with me next time."
- "We love this area and have for many years. Fort Myers Beach is looking much better. Happy to be able to stay here again."
- "My happy place. Already excited about coming back soon."
- "It's an upbeat, family-oriented area that also has plenty of opportunities for adults to slip away and have a good time. Beautiful area even after the hurricane."

[1]Open-ended responses.

Detailed Findings



VISITOR JOURNEY: ECONOMIC IMPACT ON DESTINATION



TOURISM SNAPSHOT: KEY METRICS

Visitor & Lodging Statistics	Jul - Sep 2025[3]	Jul - Sep 2026	% Change '25-'26
Visitors	762,800	895,500	+ 17.4%
Visitor Days	4,256,400	5,220,800	+ 22.7%
Room Nights	944,700	1,075,000	+ 13.8%
Direct Expenditures[1]	$643,172,500	$738,672,400	+ 14.8%
Total Economic Impact[2]	$822,492,100	$978,244,500	+ 18.9%

[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 revised to reflect an updated IMPLAN dataset.

TOURISM SNAPSHOT: KEY METRICS FY

Visitor & Lodging Statistics	FY 2025[3]	FY 2026	% Change '25-'26
Visitors	3,274,700	3,808,400	+ 16.3%
Visitor Days	20,787,100	23,862,400	+ 14.8%
Room Nights	4,603,100	5,236,700	+ 13.8%
Direct Expenditures[1]	$3,186,168,400	$3,834,896,200	+ 20.4%
Total Economic Impact[2]	$4,249,965,200	$5,150,382,600	+ 21.2%

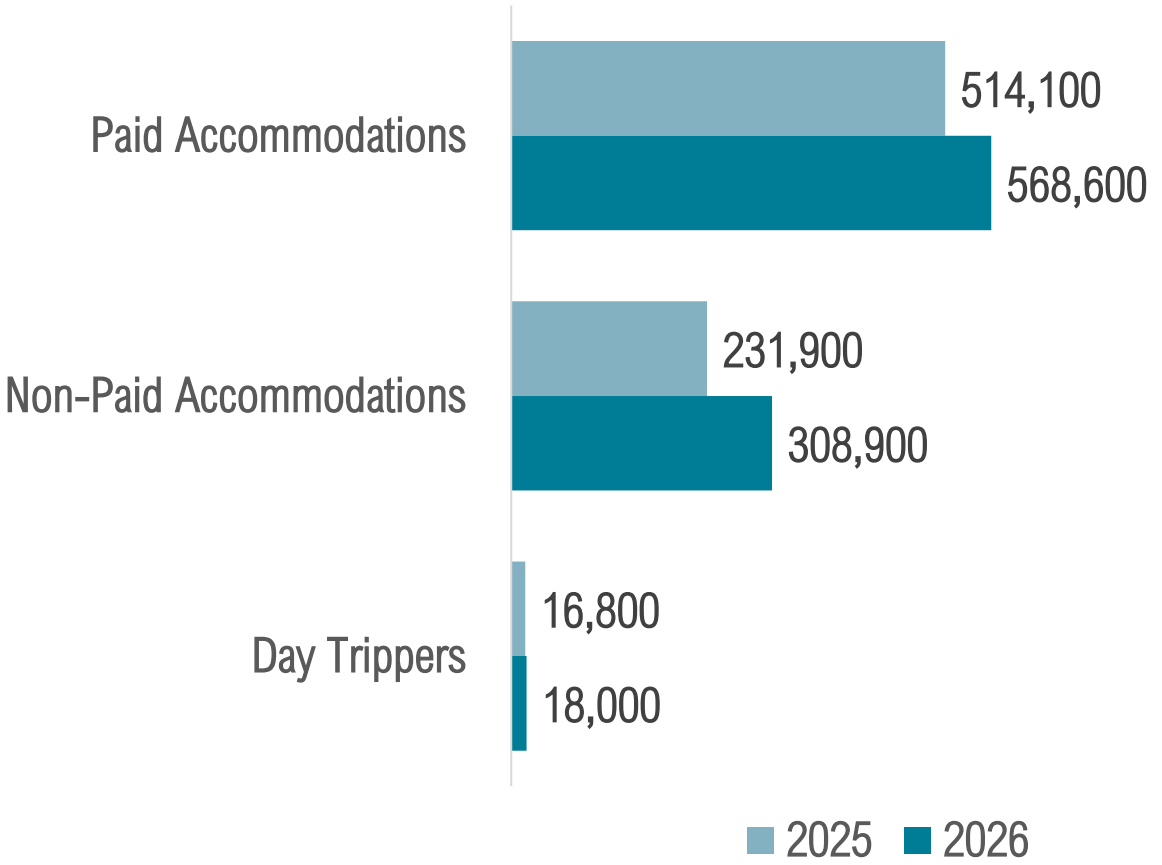
[1]Includes: accommodations, restaurants, entertainment, shopping, transportation, groceries, and "other" expenses.

[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 revised to reflect an updated IMPLAN dataset.

NUMBER OF VISITORS

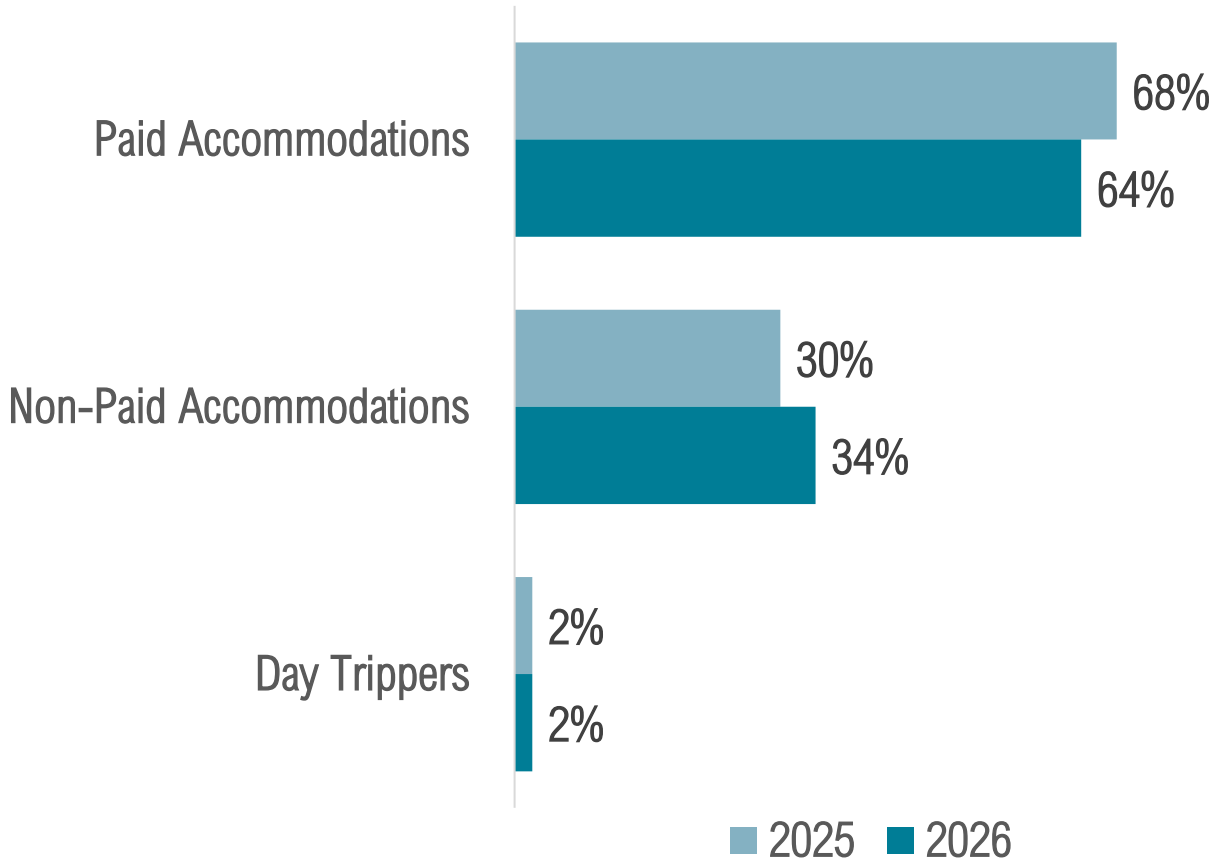
- There were 895,500 visitors to the Fort Myers area in Jul - Sep 2026 (+17.4% from 2025).



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

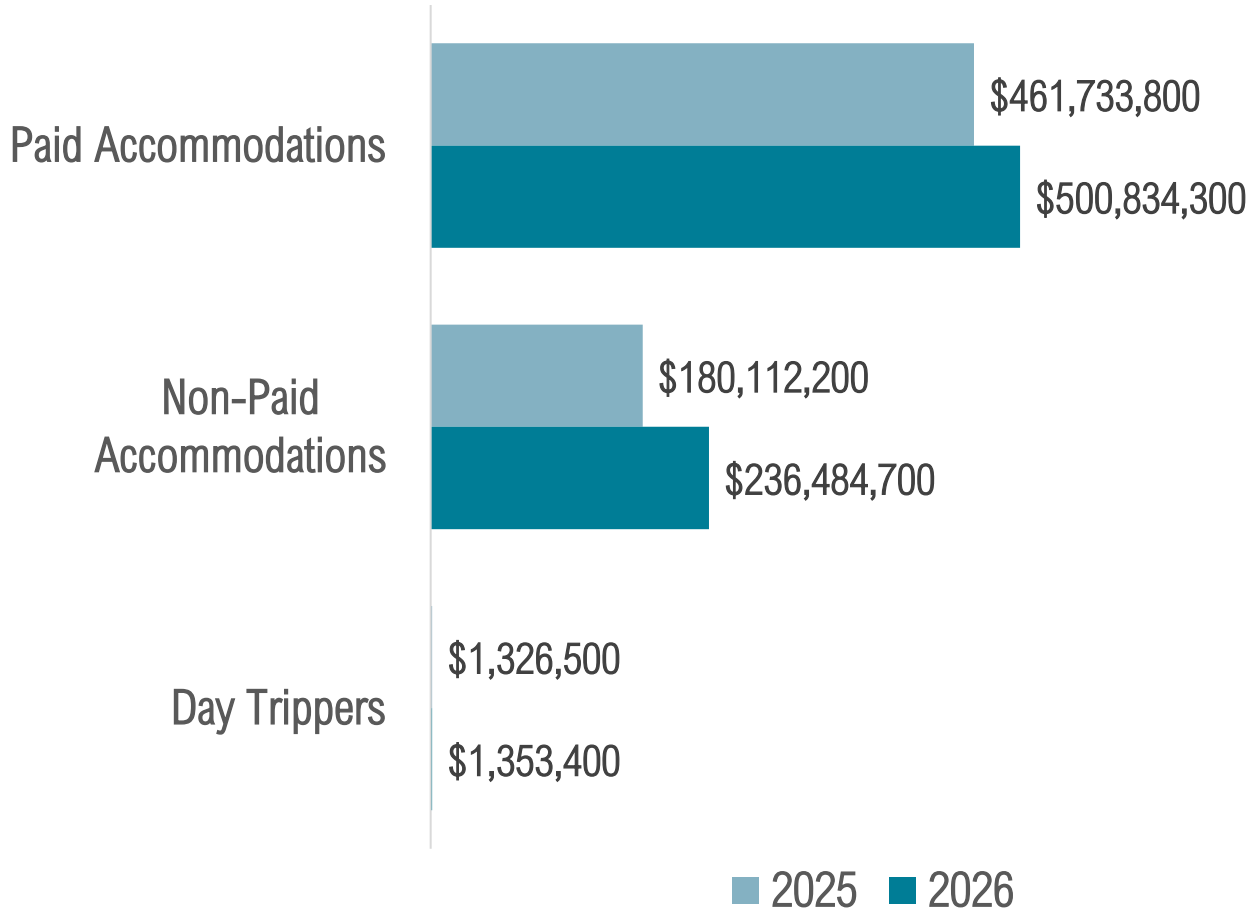
VISITOR TYPE

- Visitors staying in paid accommodations accounted for 64% of visitors.



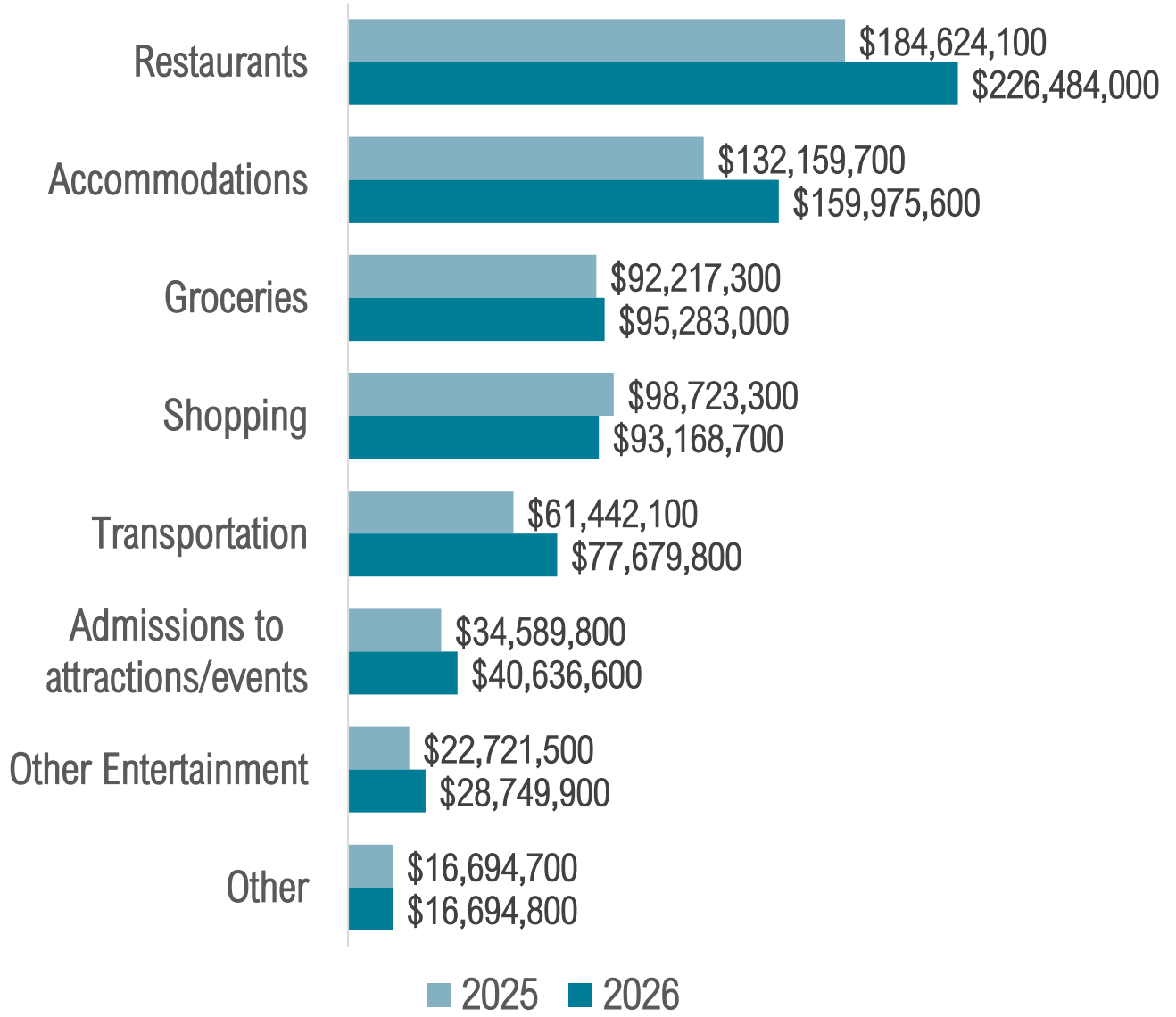
VISITOR EXPENDITURES BY VISITOR TYPE

- Jul - Sep visitors spent $738,672,400 in the Fort Myers area, resulting in a total economic impact of $978,244,500, up 18.9% from 2025.
- Visitors staying in paid accommodations accounted for 64% of all visitors and 68% of all spending.



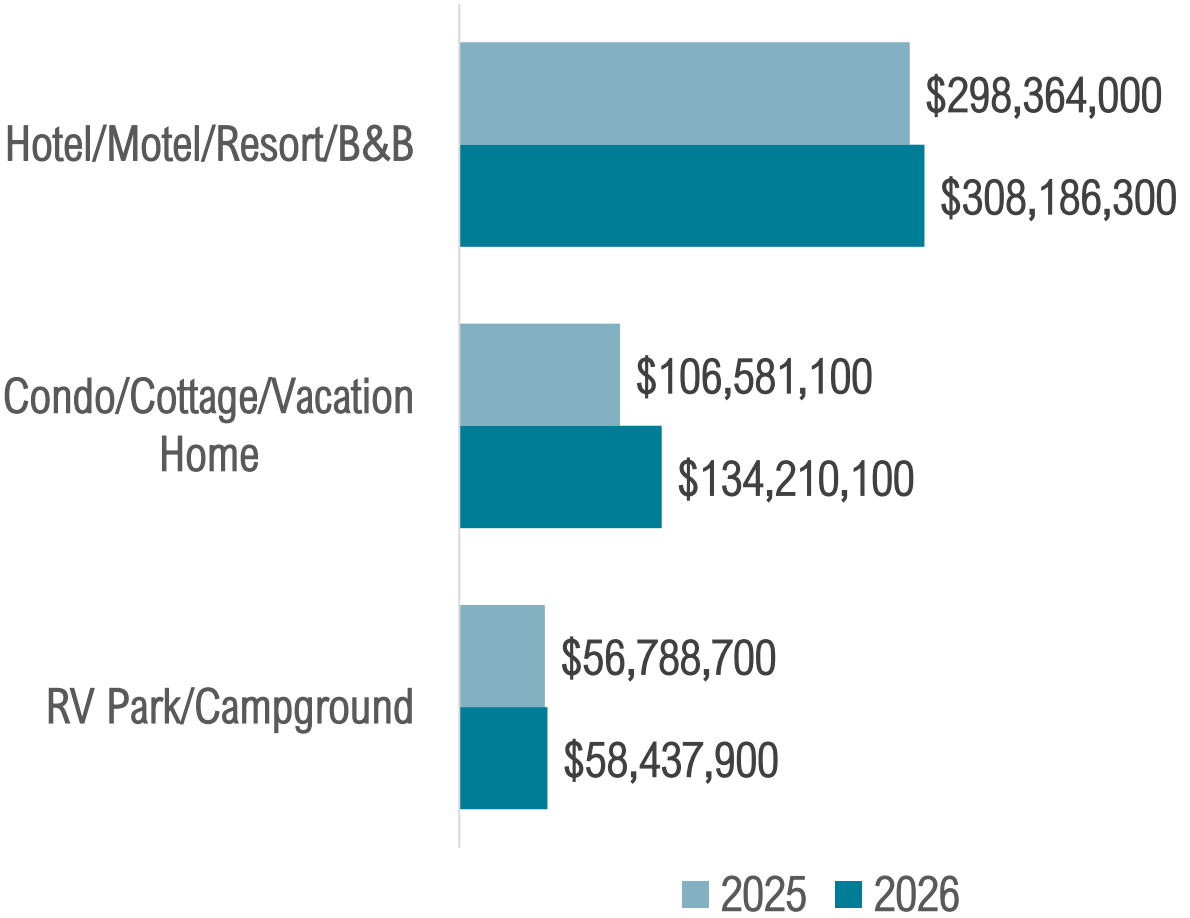
VISITOR EXPENDITURES BY SPENDING CATEGORY

- Of the $738,672,400 visitors spent in the Fort Myers area, 31% was spent on restaurants and 22% was spent on lodging, accounting for 52% of all visitor spending.



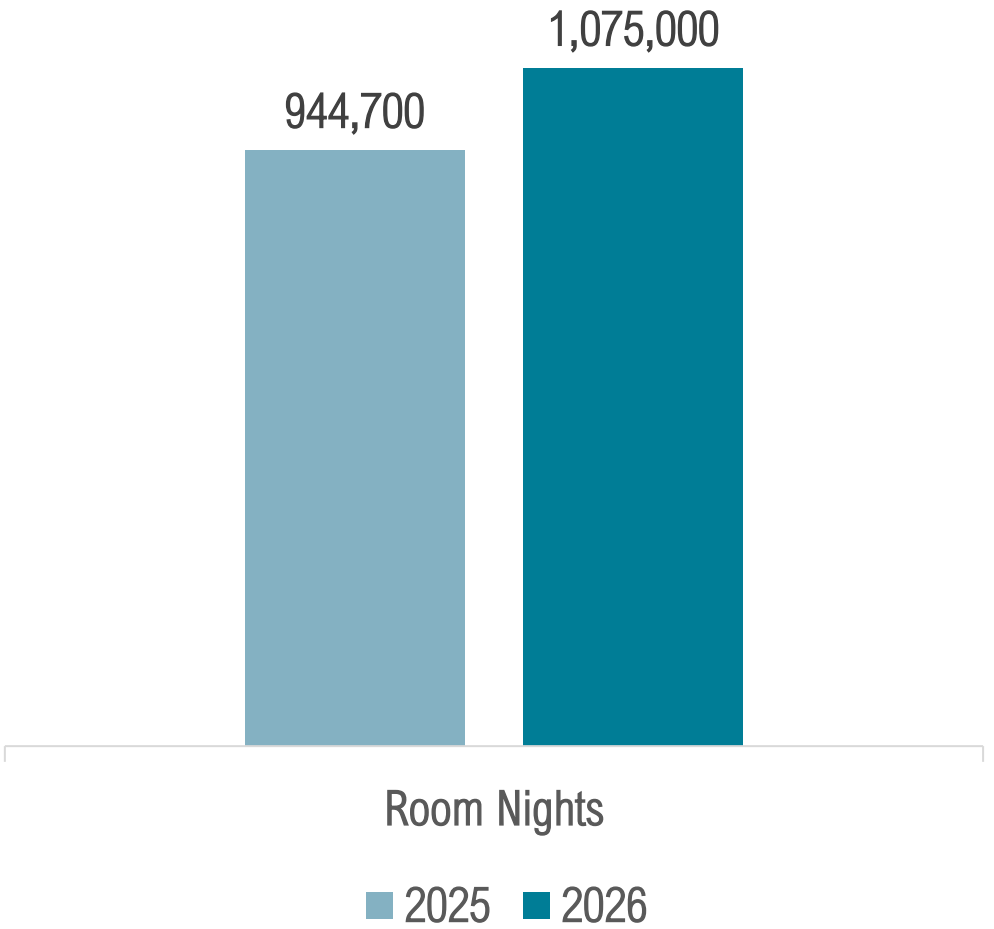
VISITOR EXPENDITURES BY LODGING TYPE

- Jul - Sep visitors staying in paid accommodations spent $500,834,300 in the Fort Myers area (+8.5% from 2025).



ROOM NIGHTS GENERATED[1]

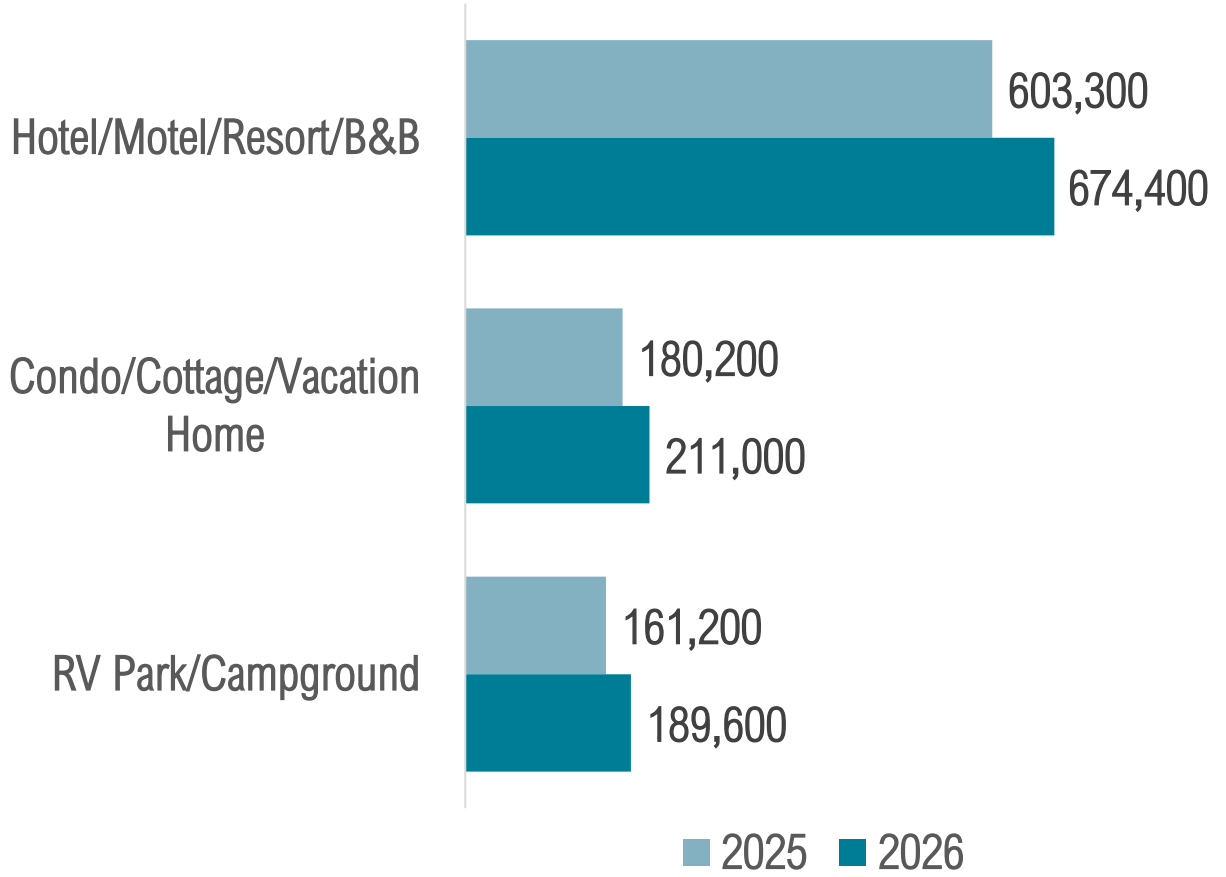
- Jul - Sep visitors spent 1,075,000 nights in Fort Myers area hotels, resorts, condos, rental houses, RV parks, etc. (+13.8% from 2025).



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

ROOM NIGHTS GENERATED BY LODGING TYPE[1]

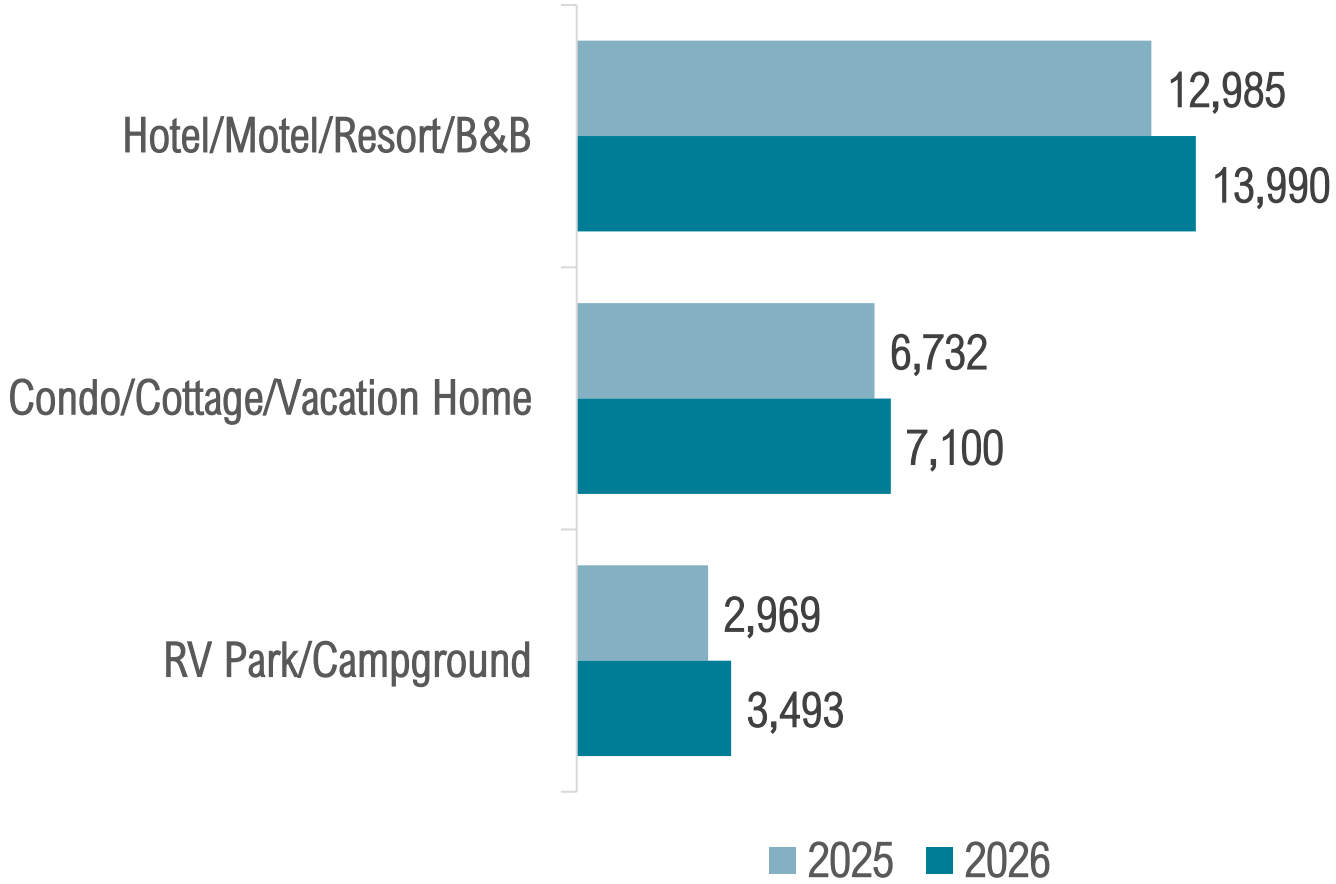
- Hotels, motels, etc. accounted for 63% of room nights spent in the Fort Myers area, while vacation rentals accounted for 19% of room nights, and RV parks/campgrounds accounted for the remaining 18% of nights that visitors spent in the area.



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

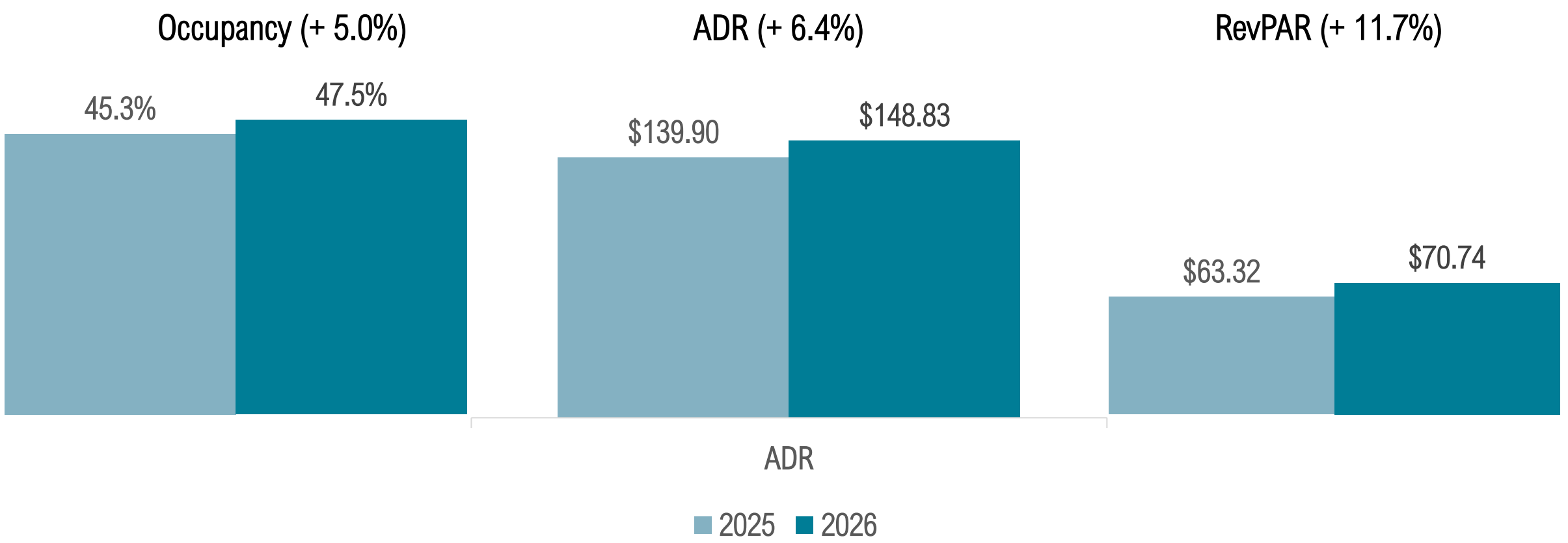
AVAILABLE UNITS[1]

- There were 24,583 available units in Jul - Sep 2026 vs. 22,686 in 2025 (+8.4%). 57% of the units available were from hotels, motels, etc.



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

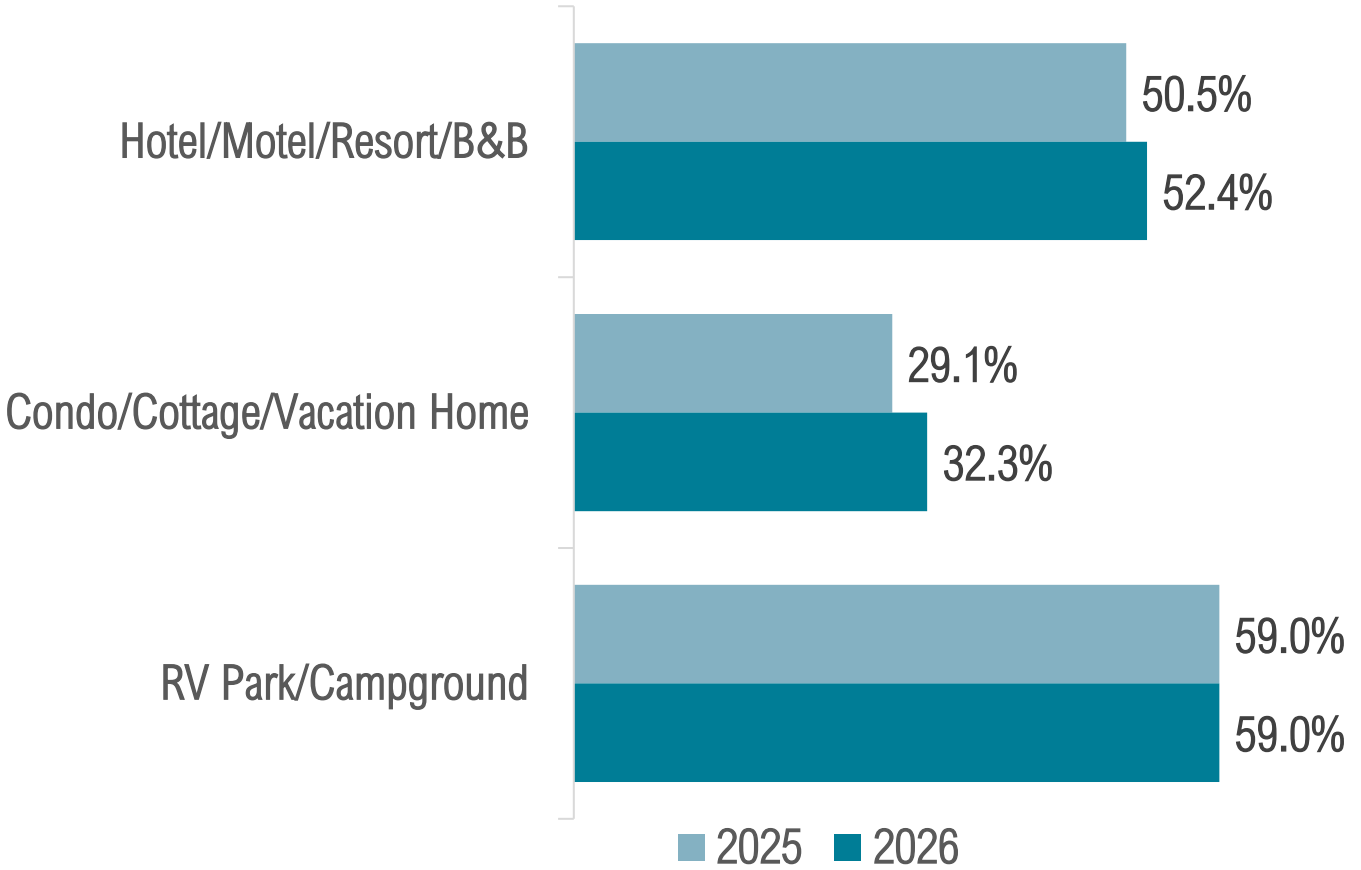
OCCUPANCY, ADR AND REVPAR[1]



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

OCCUPANCY[1]

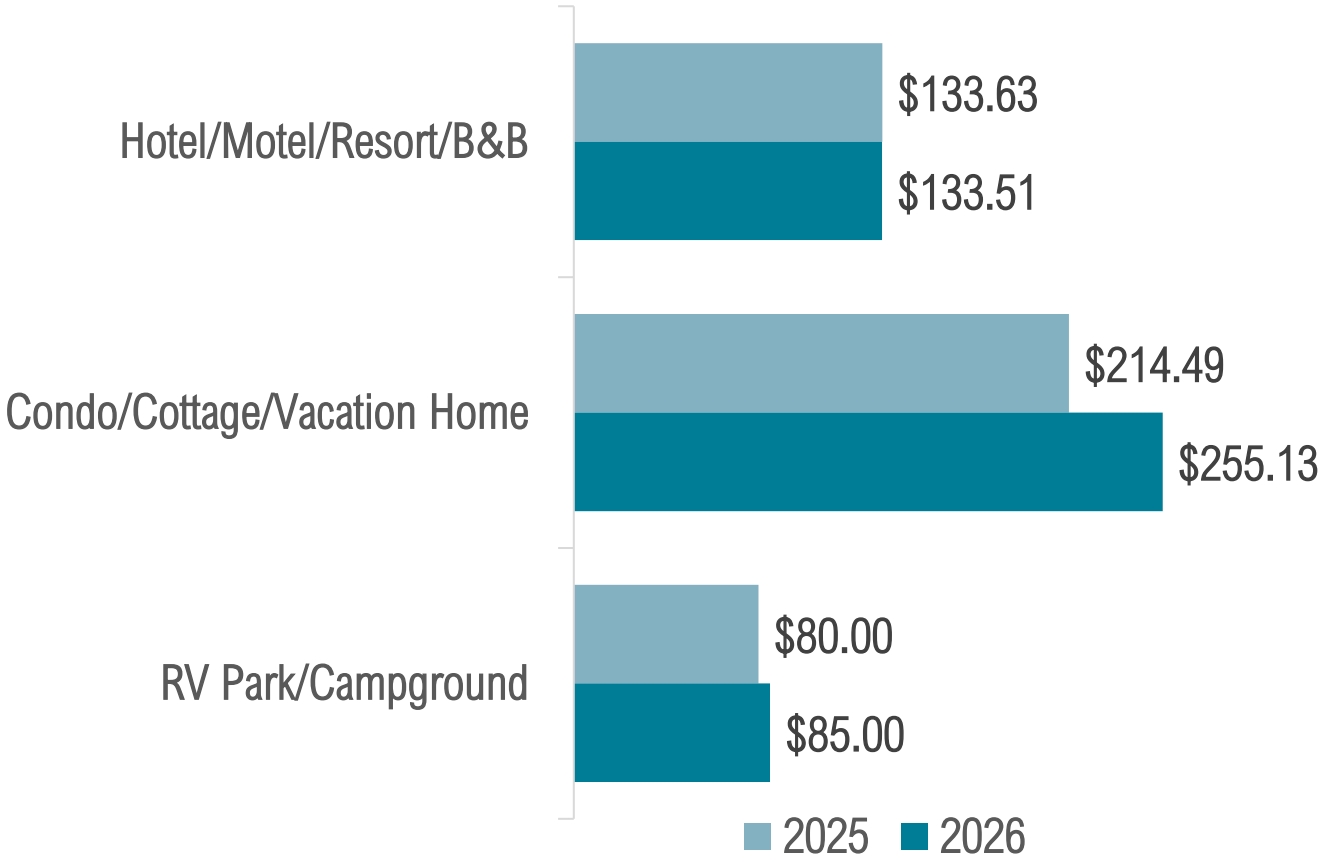
- Average occupancy in Jul - Sep was 47.5% (45.3% in 2025).



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

ADR[1]

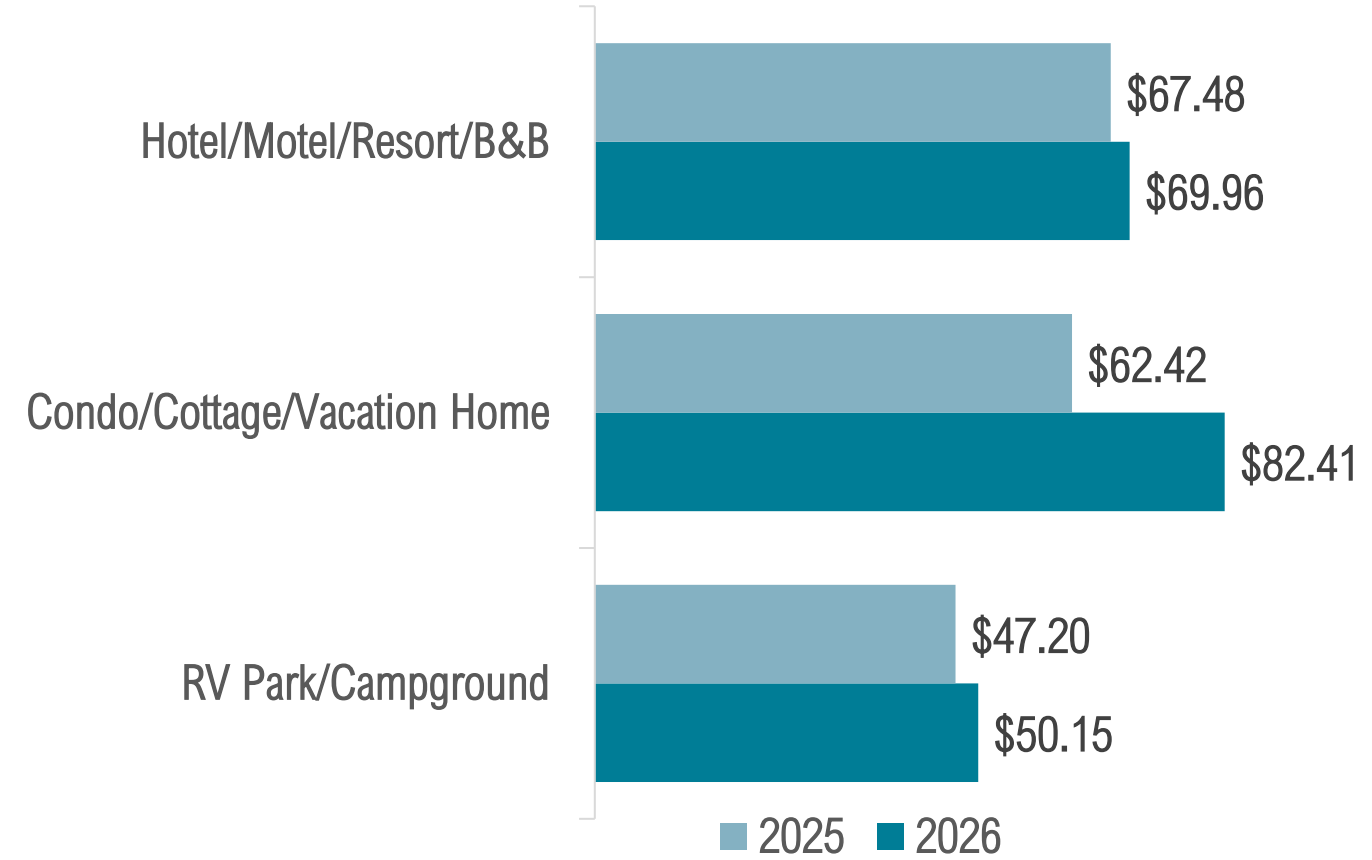
- ADR in Jul - Sep was $148.83 ($139.90 in 2025).



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

REVPAR[1]

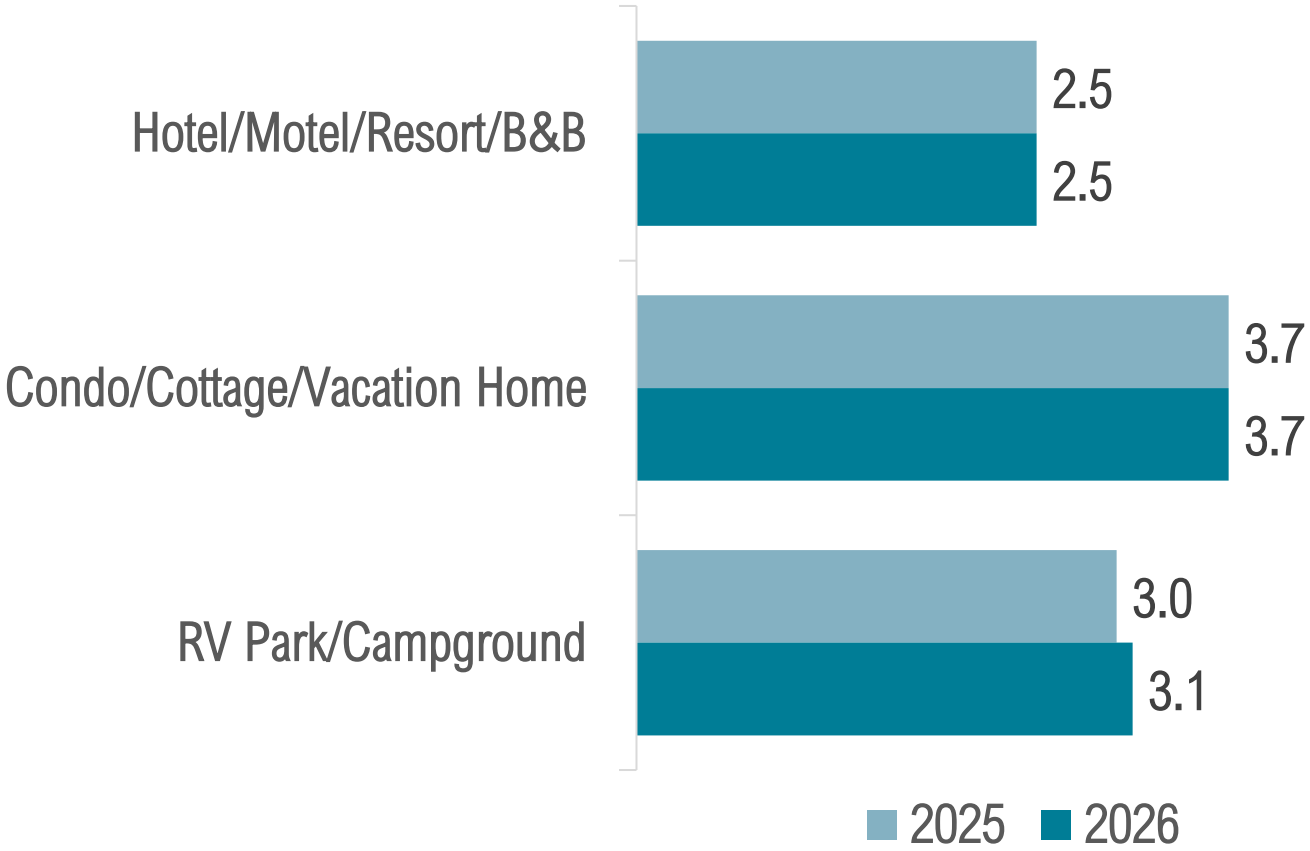
- Average RevPAR in Jul - Sep was $70.74 ($63.32 in 2025).



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

TRAVEL PARTY SIZE[1]

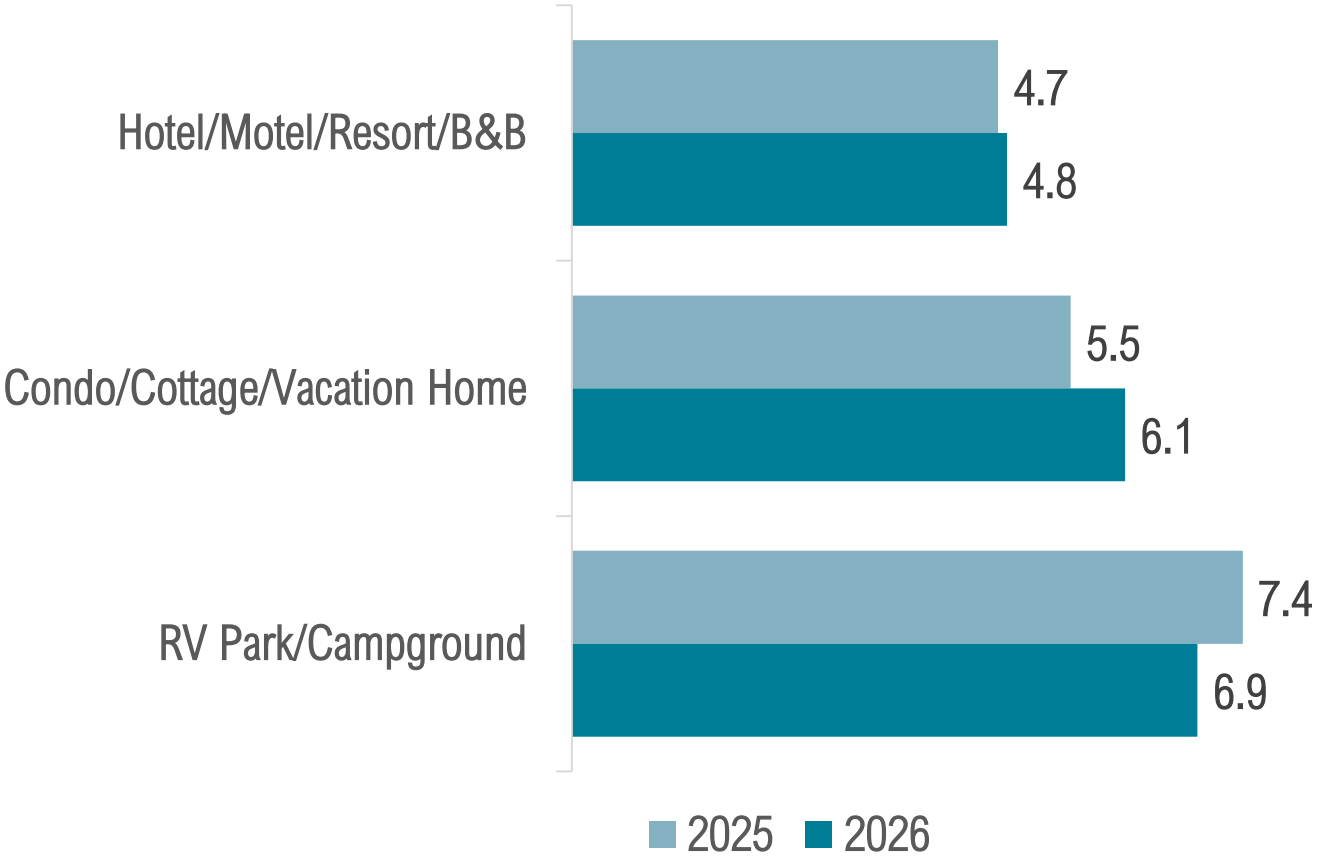
- For visitors in paid accommodations, average travel party size in Jul - Sep was 2.9 people (also 2.9 people in 2025).



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

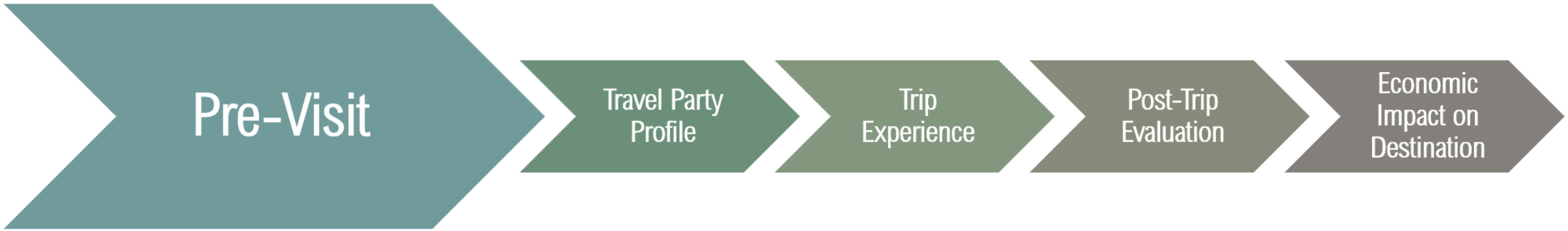
LENGTH OF STAY[1]

- For visitors in paid accommodations, average length of stay in Jul - Sep was 5.4 nights (5.2 nights in 2025).



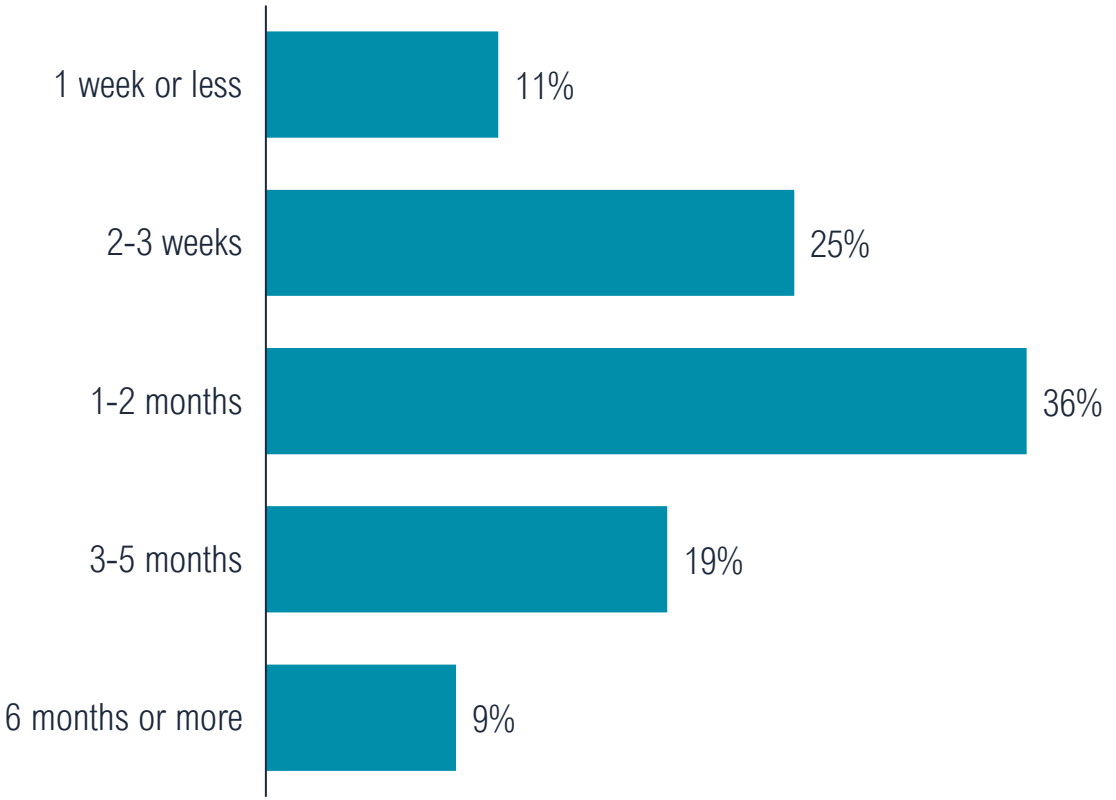
[1]Sources: DBPR, DSG Occupancy Study, Smith Travel Research, and KeyData

VISITOR JOURNEY: PRE-VISIT



TRIP PLANNING CYCLE[1]

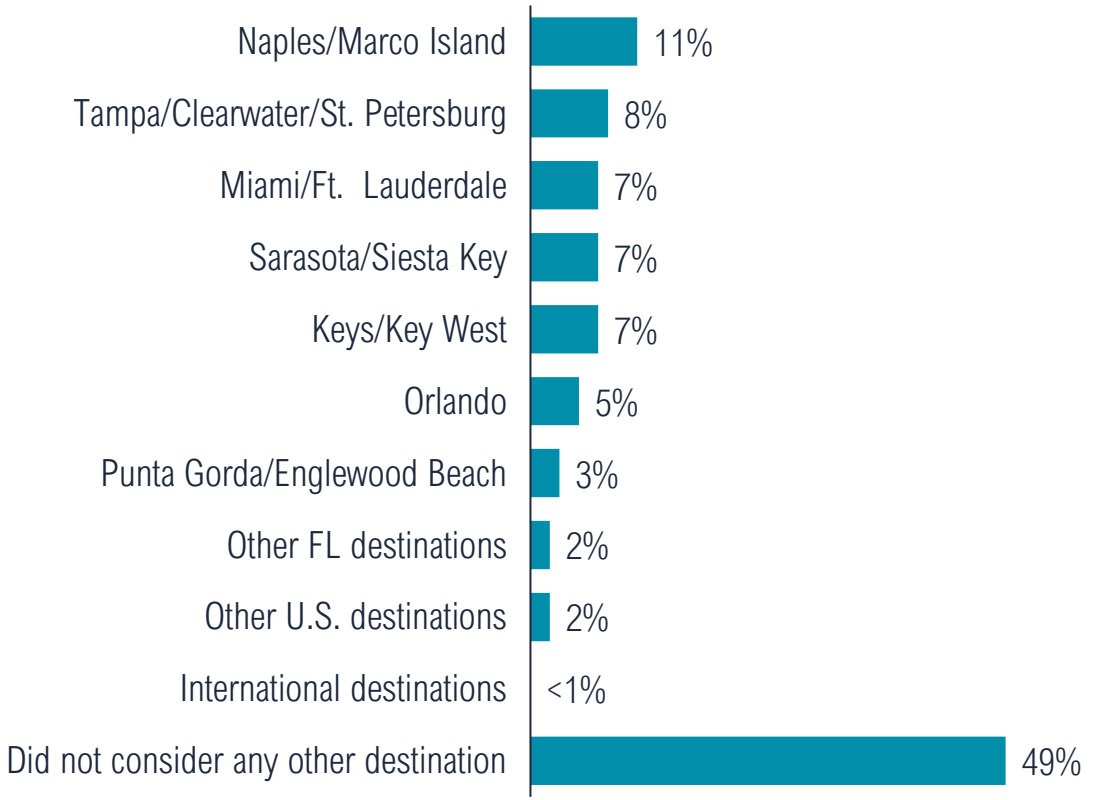
- 36% of visitors planned their trip 1-2 months in advance.
- The average trip planning cycle lasted over 1 month (42 days).



[1]Survey question format changed in 2026.

TRIP PLANNING: OTHER DESTINATIONS CONSIDERED[1]

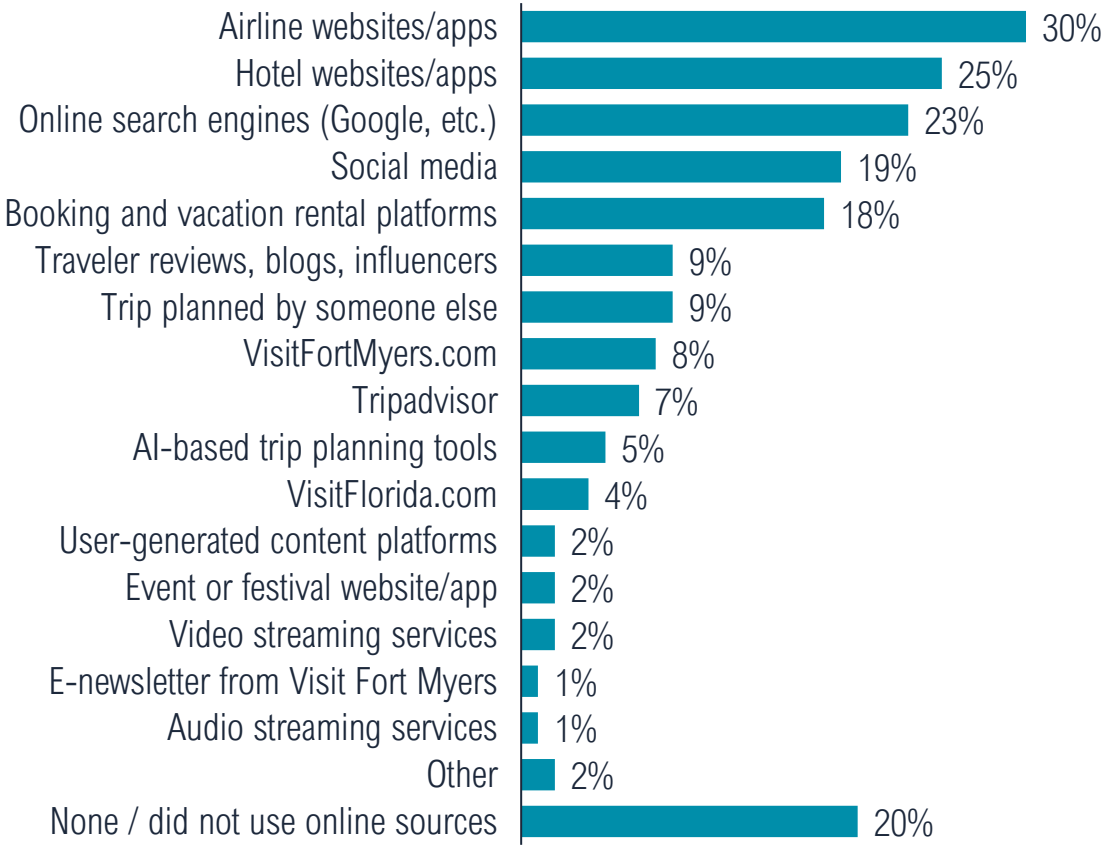
- Over half of visitors considered visiting other destinations before selecting the Fort Myers area.
- The alternate destination that visitors considered most often was Naples/Marco Island.



[1]Multiple responses permitted.

TRIP PLANNING: WEBSITES/APPS USED[1]

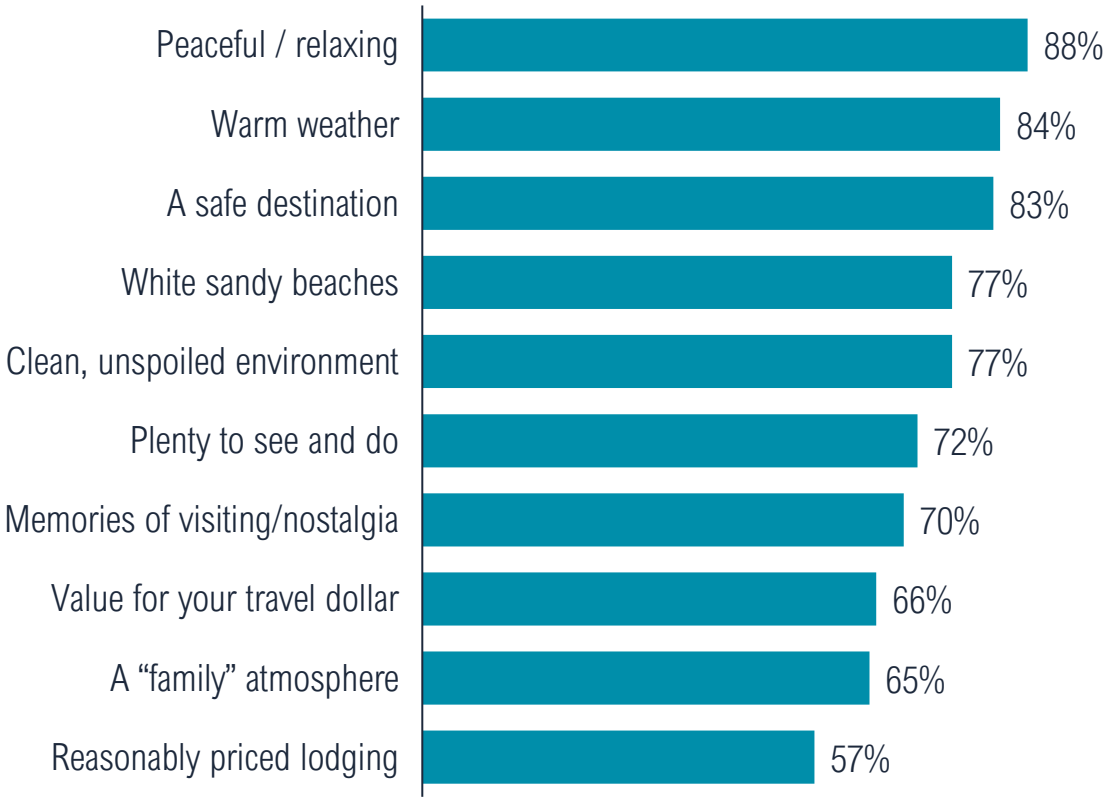
- 4 in 5 visitors used websites and apps to plan their trip to the Fort Myers area.
- Visitors were most likely to use airline and hotel websites to plan their trips.
- 23% used online search engines and nearly 1 in 5 used social media to plan their trips.



[1]Multiple responses permitted.

TRIP INFLUENCERS[1]

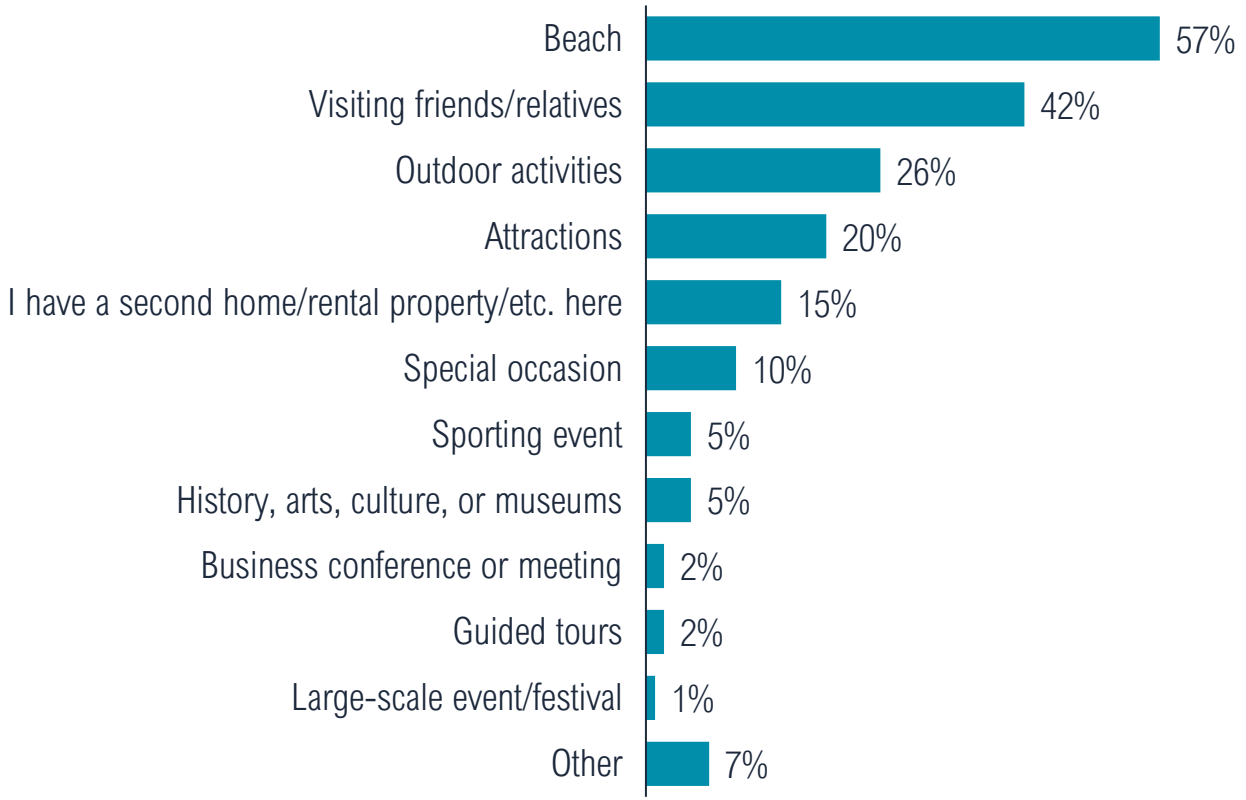
- Visitors were most heavily influenced by the **peacefulness, weather, and safety** of the Fort Myers area when thinking about visiting.



[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]

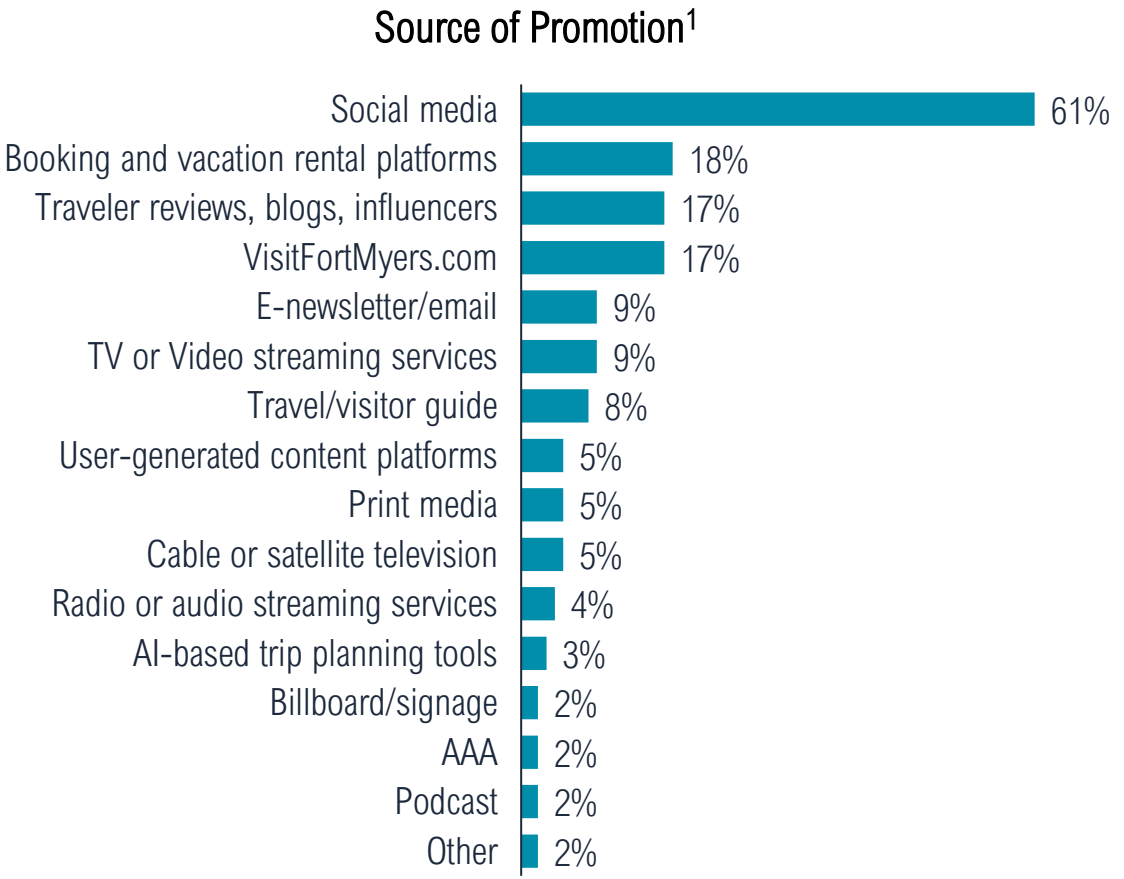
- The **beach** was the dominant motivator for travel to the area, with **57%** of visitors citing this as a main reason for visiting.



[1]Three responses permitted.

PROMOTIONS RECALL

- 37% of visitors recalled promotions for the Fort Myers area in the past 6 months.
- This influenced 20% of all visitors to come to the Fort Myers area.

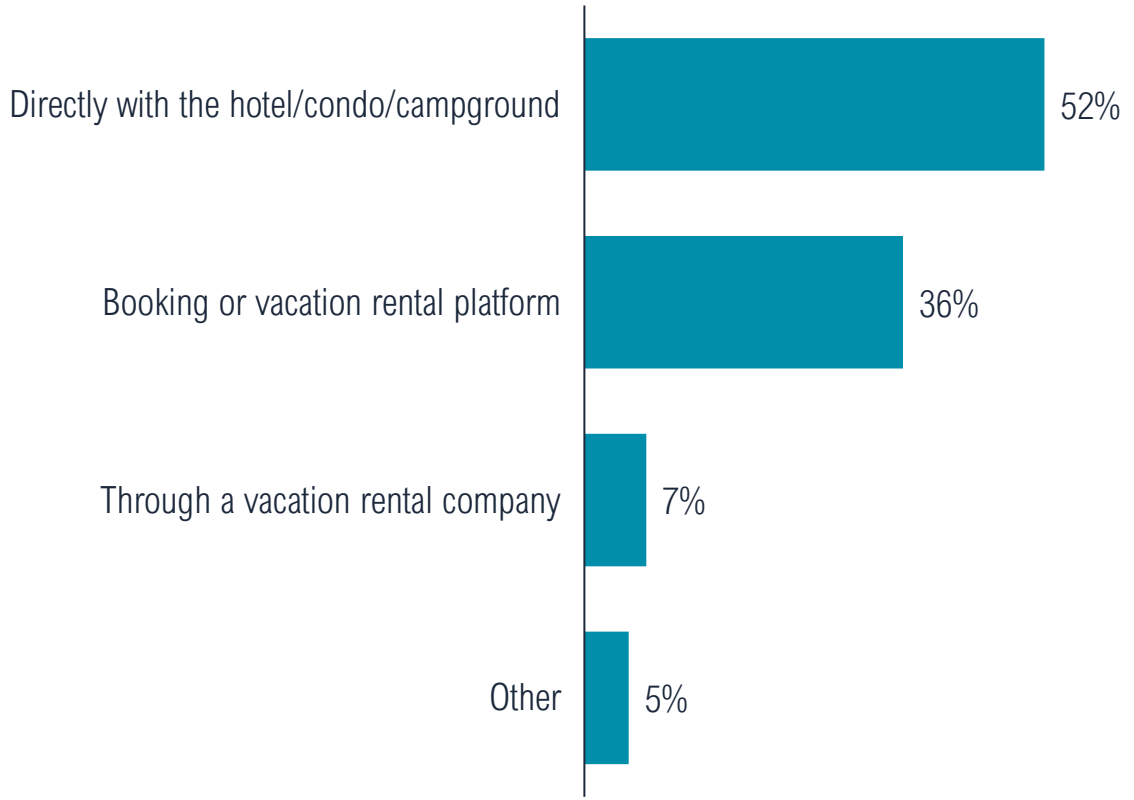


BASE: 37% of visitors who recalled promotions

[1]Multiple responses permitted.

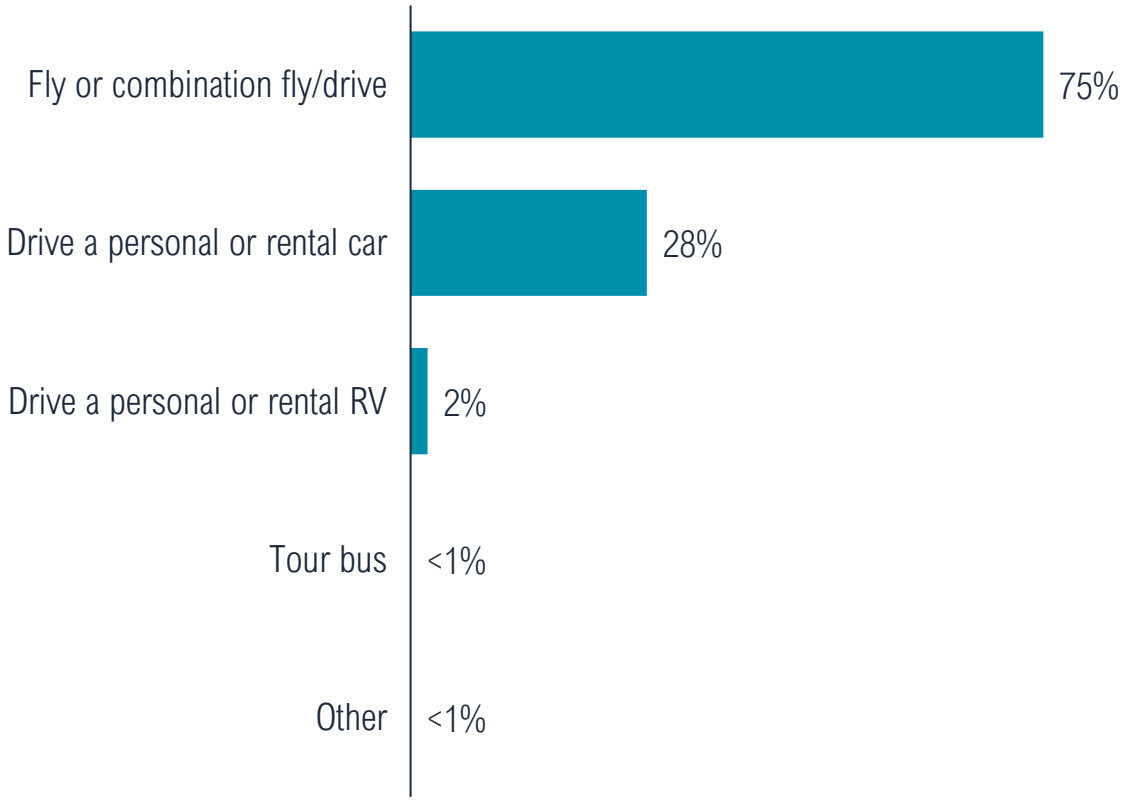
BOOKING

- Over half of visitors who stayed in paid accommodations booked directly with the hotel, condo, or campground.



TRANSPORTATION[1]

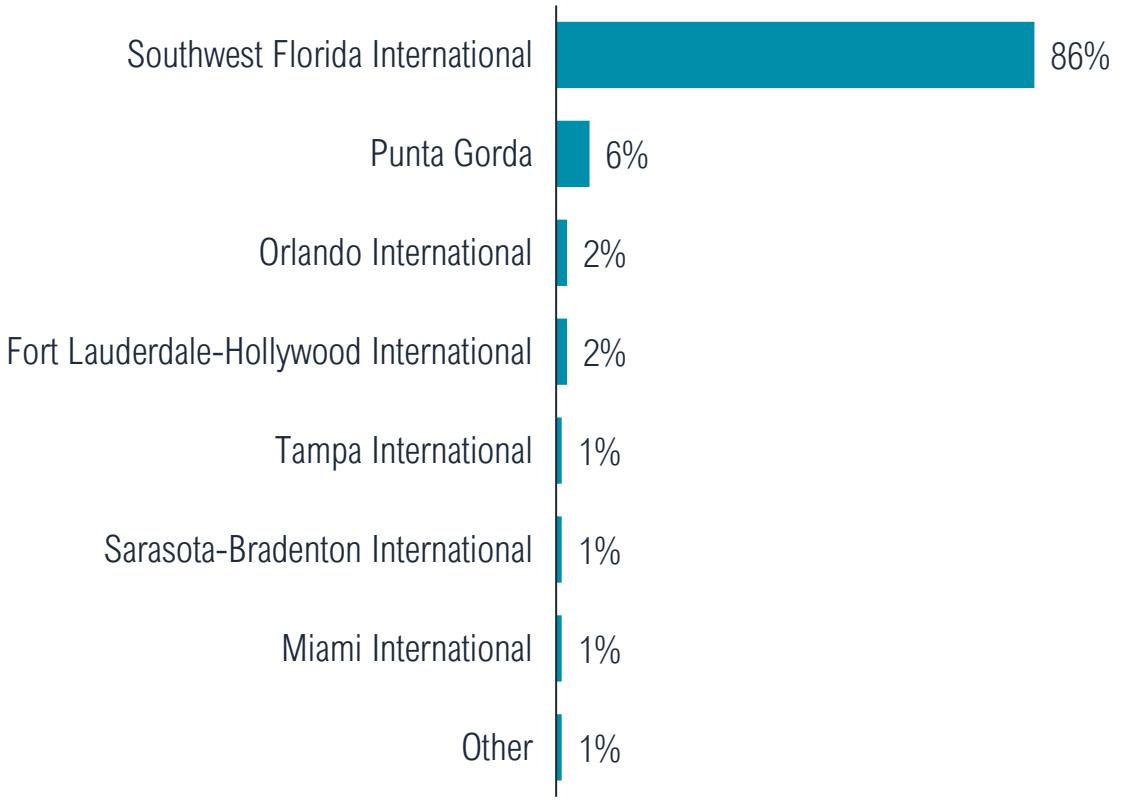
- 3 in 4 visitors flew to the Fort Myers area.



[1]Multiple responses permitted.

AIRPORT

- 86% of visitors who flew to the Fort Myers area came through RSW.

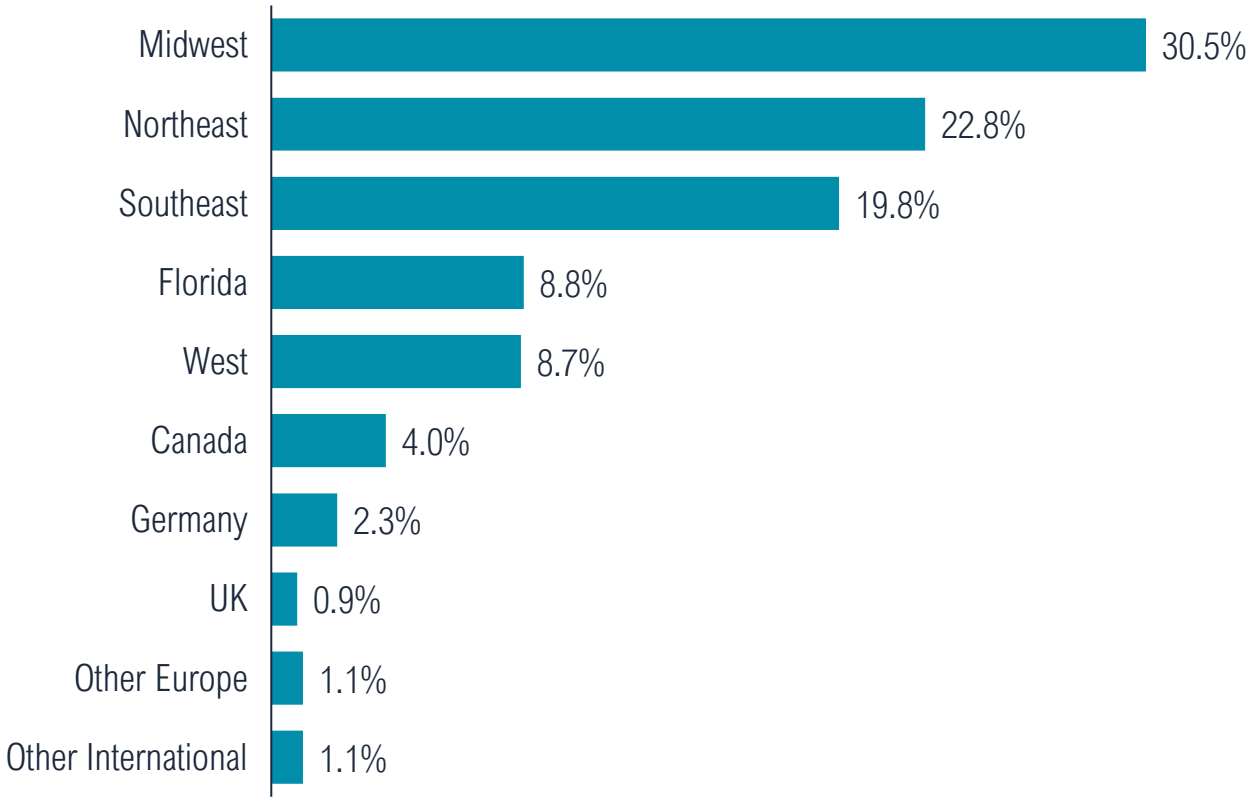


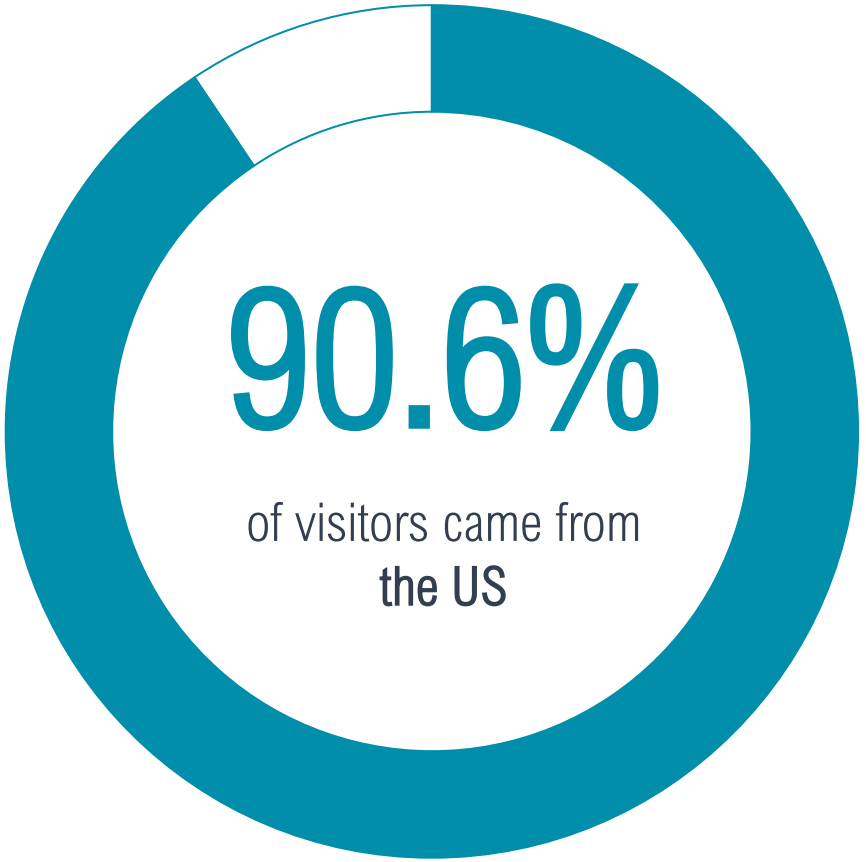
BASE: 75% of visitors who flew

VISITOR JOURNEY: TRAVEL PARTY PROFILE



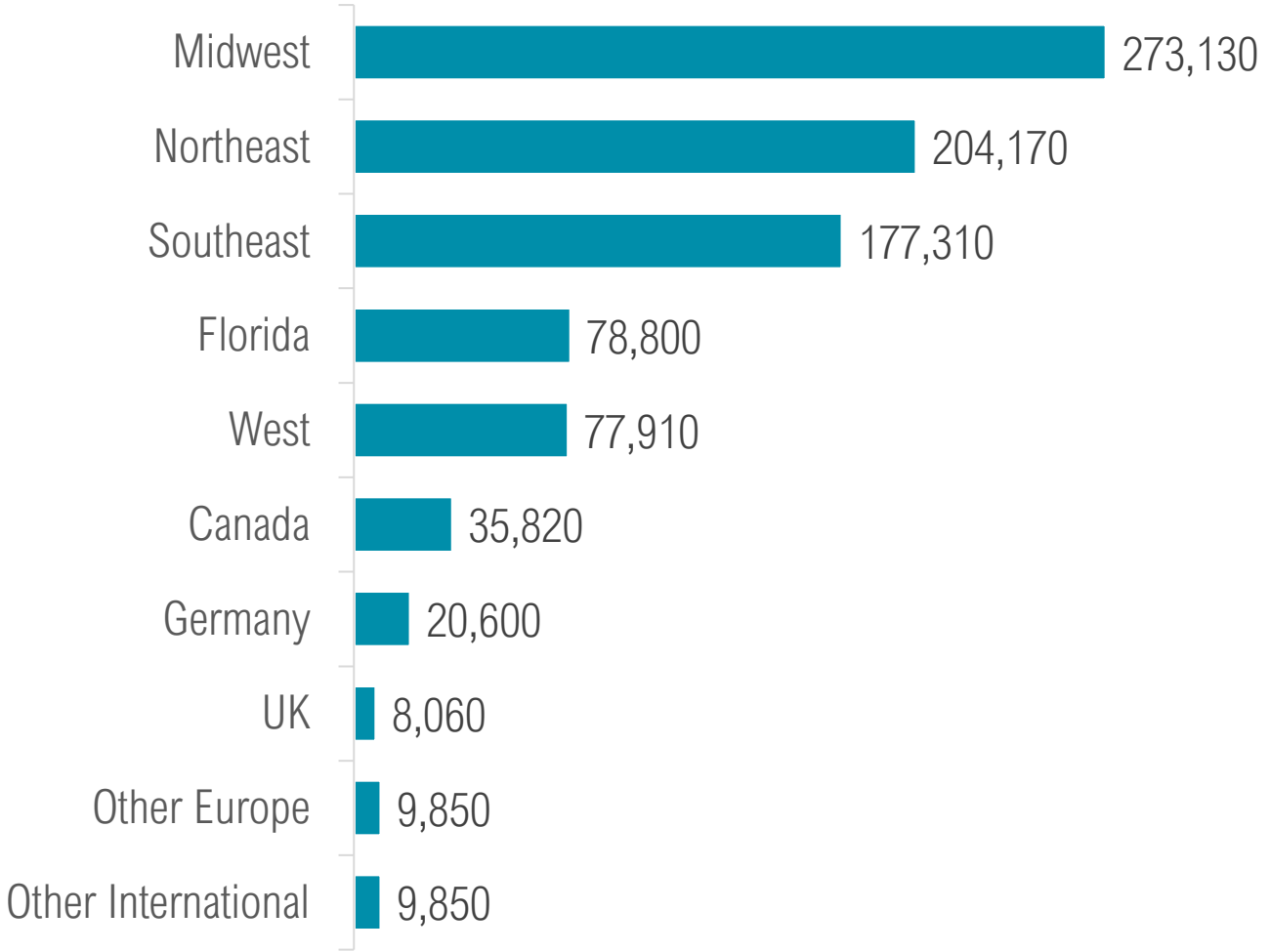
ORIGIN[1]





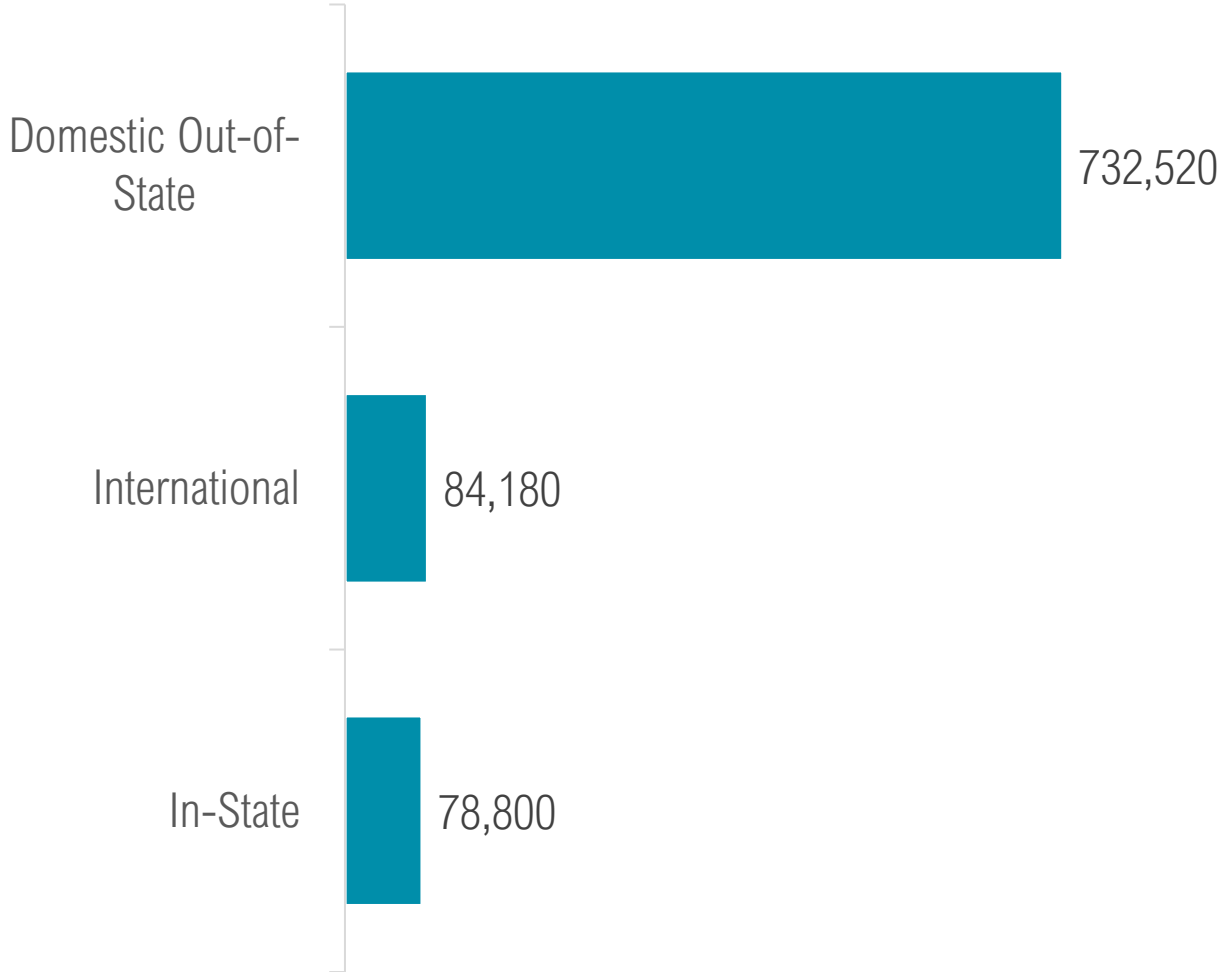
[1]Includes visitors who stayed in paid accommodations, non-paid accommodations, and day trippers.
Based on data from the Visitor Tracking Study.

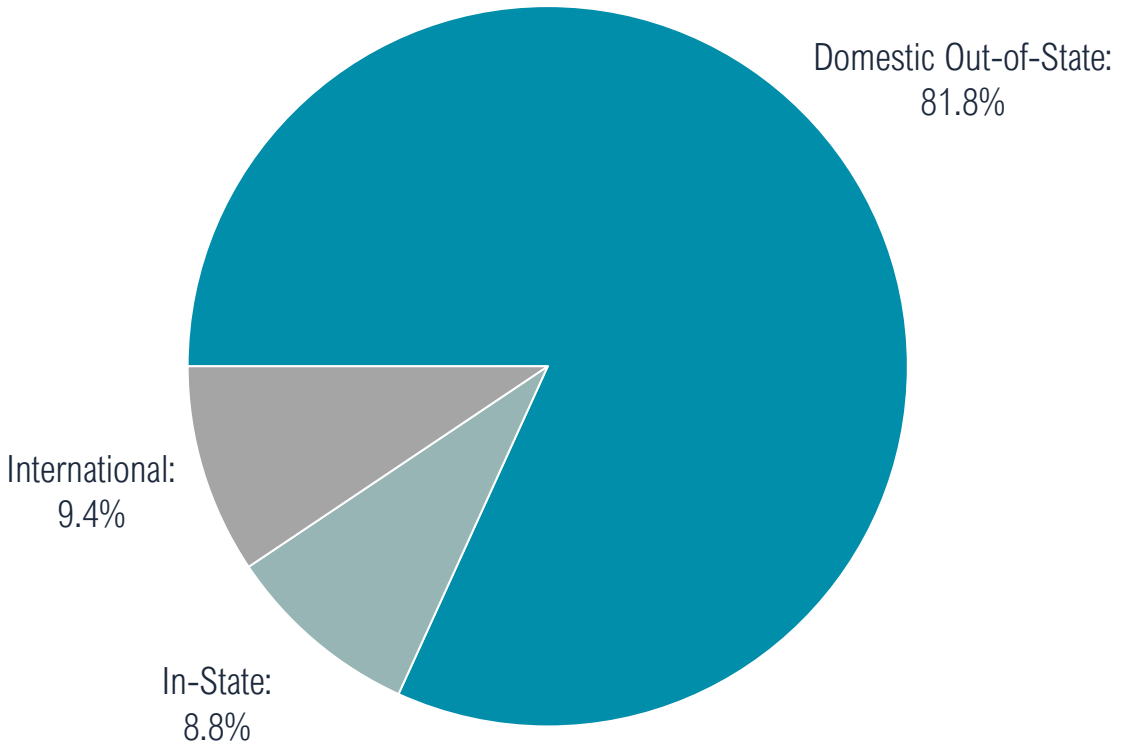
NUMBER OF VISITORS BY ORIGIN[1]



[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]

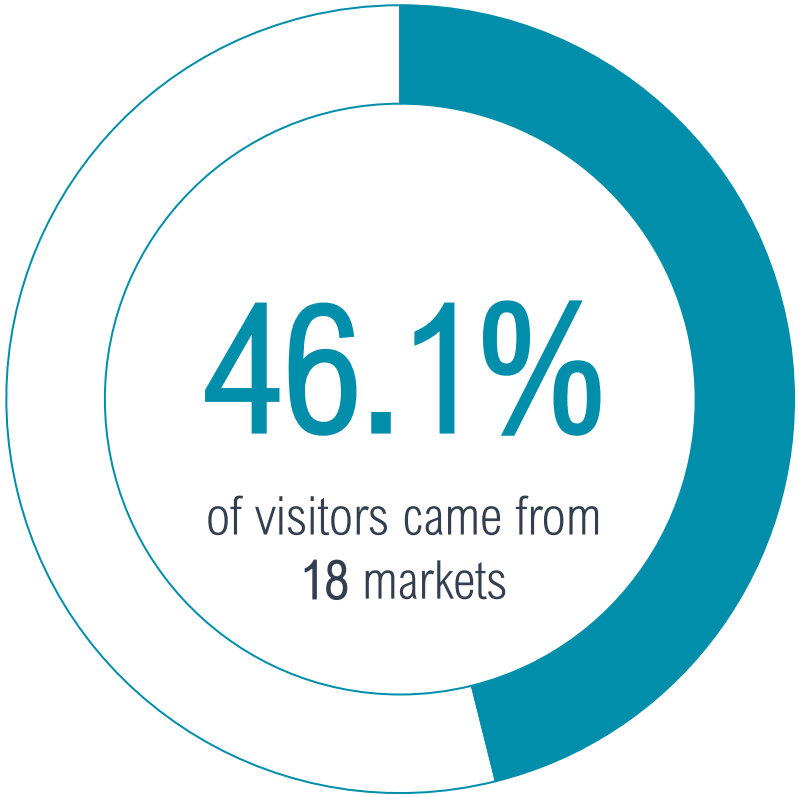




[1]Includes visitors who stayed in paid accommodations, non-paid accommodations, and day trippers. Based on data from the Visitor Tracking Study.

ORIGIN MARKETS[1-4]

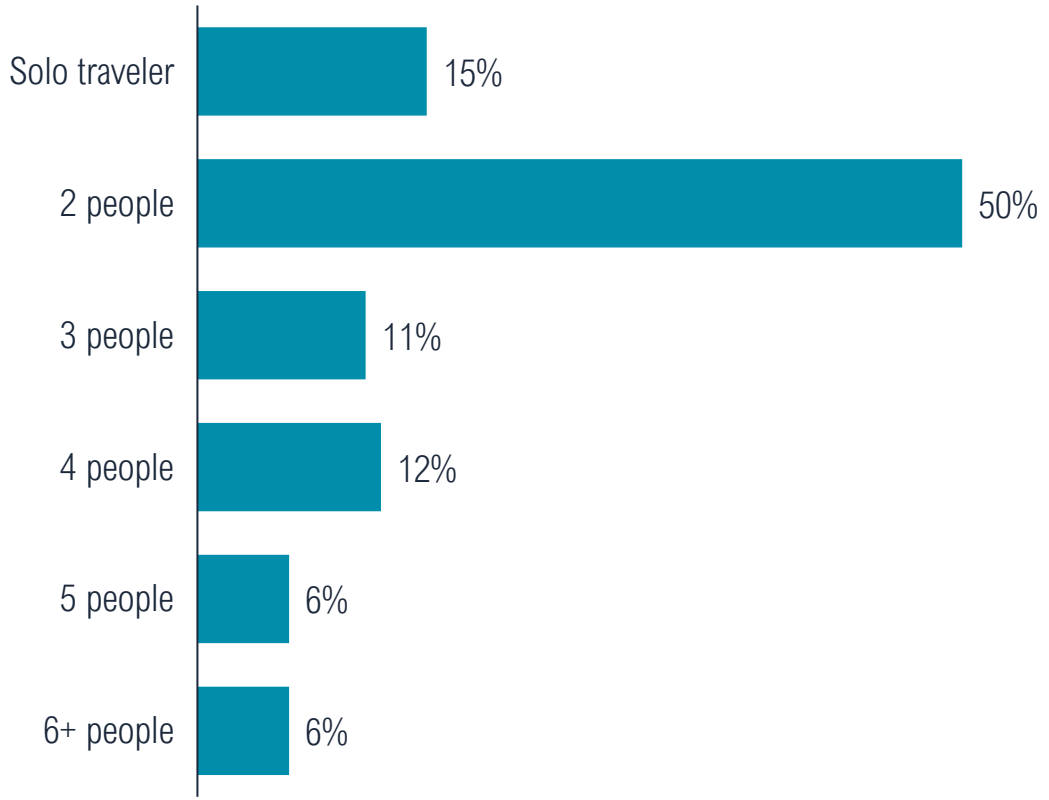
Market	Percent
New York City	5.9%
Chicago	5.1%
Atlanta	3.7%
Cleveland-Akron	3.5%
Philadelphia	3.4%
Denver	2.7%
Indianapolis	2.4%
Cincinnati	2.2%
Boston	2.1%
Miami-Fort Lauderdale	2.0%
Washington, DC-Hagerstown	1.8%
Dallas-Fort Worth	1.8%
Minneapolis-St. Paul	1.7%
Detroit	1.6%
Nashville	1.6%
Pittsburgh	1.6%
Tampa-St. Petersburg	1.5%
St. Louis	1.5%



[1]Includes visitors who stayed in paid accommodations, non-paid accommodations, and day trippers.
[2]Based on data from the 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 as 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 Washington DC itself and including large portions of MD, VA, as well as some areas of WV.

TRAVEL PARTY SIZE AND COMPOSITION[1]

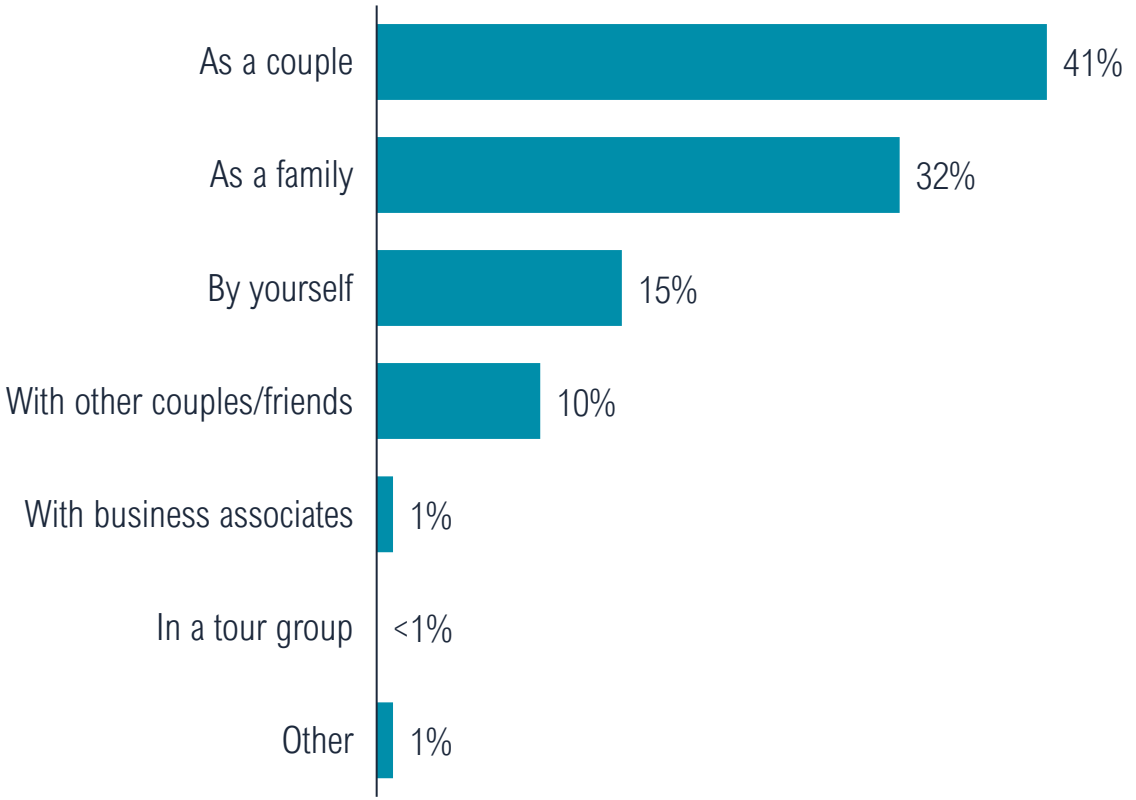
- The average travel party size was 2.7 visitors.
- 29% of visitors traveled with children under the age of 18.



[1]Sources: Occupancy Study and Visitor Tracking Study

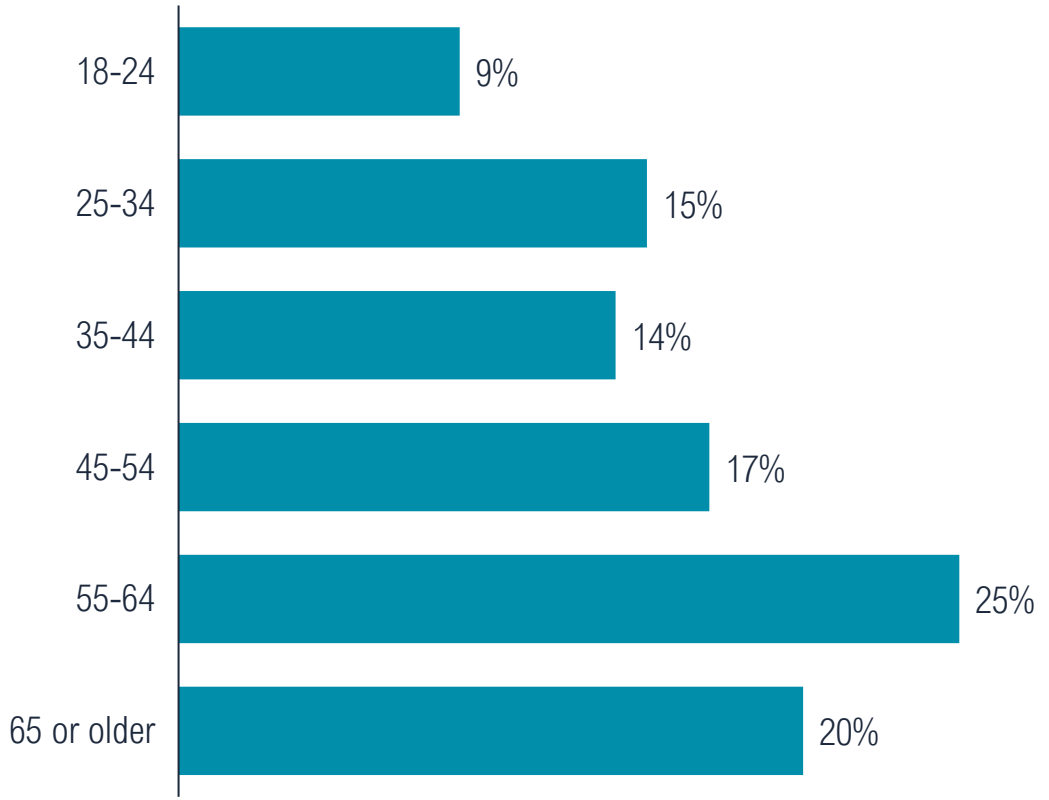
TRAVEL PARTY TYPE

- Over 2 in 5 visitors traveled as a couple.
- 15% of visitors traveled alone.



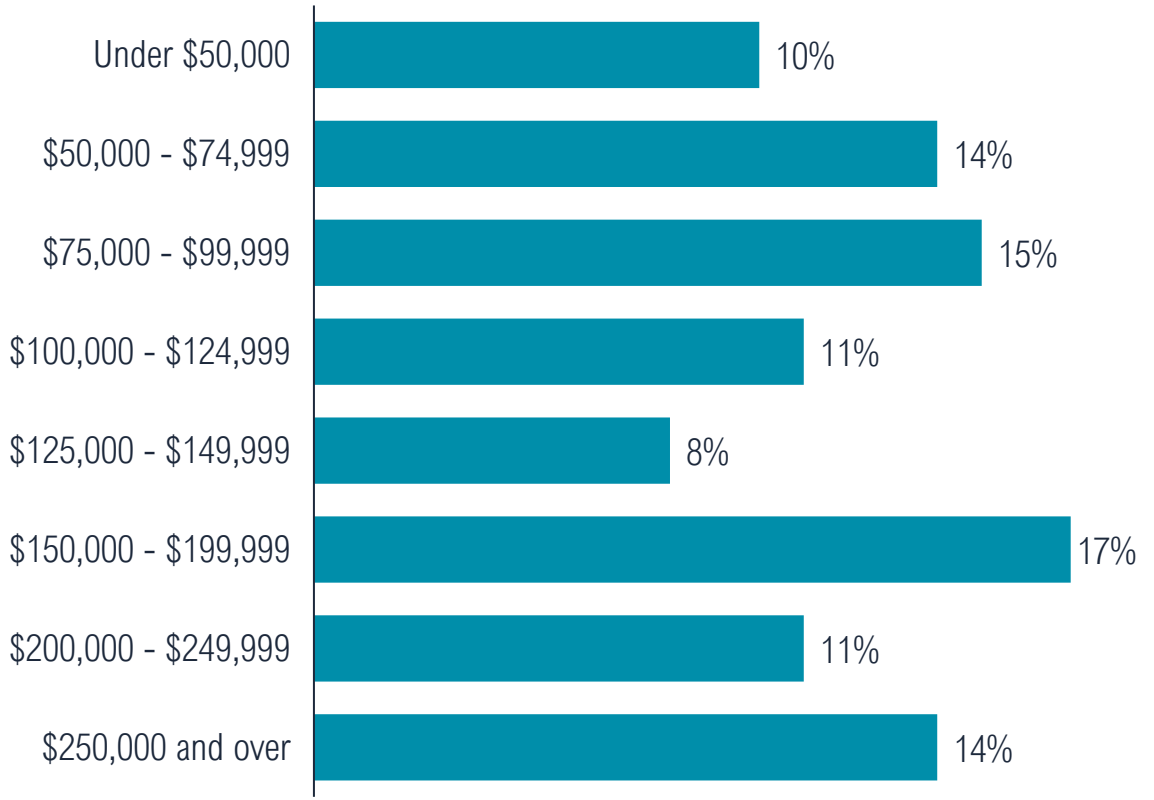
AGE

- The median age of Jul - Sep visitors was 52 years.

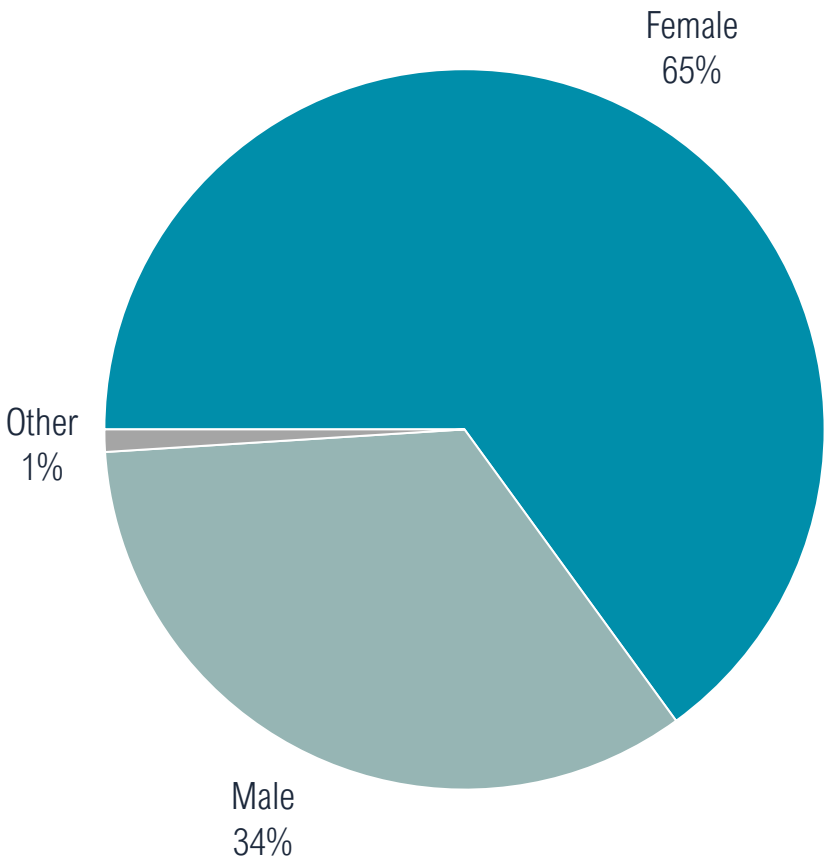


HOUSEHOLD INCOME

- Jul - Sep visitors had a median household income of $125,000.
- 1 in 4 visitors had a household income of $200,000 or more.



GENDER[1]



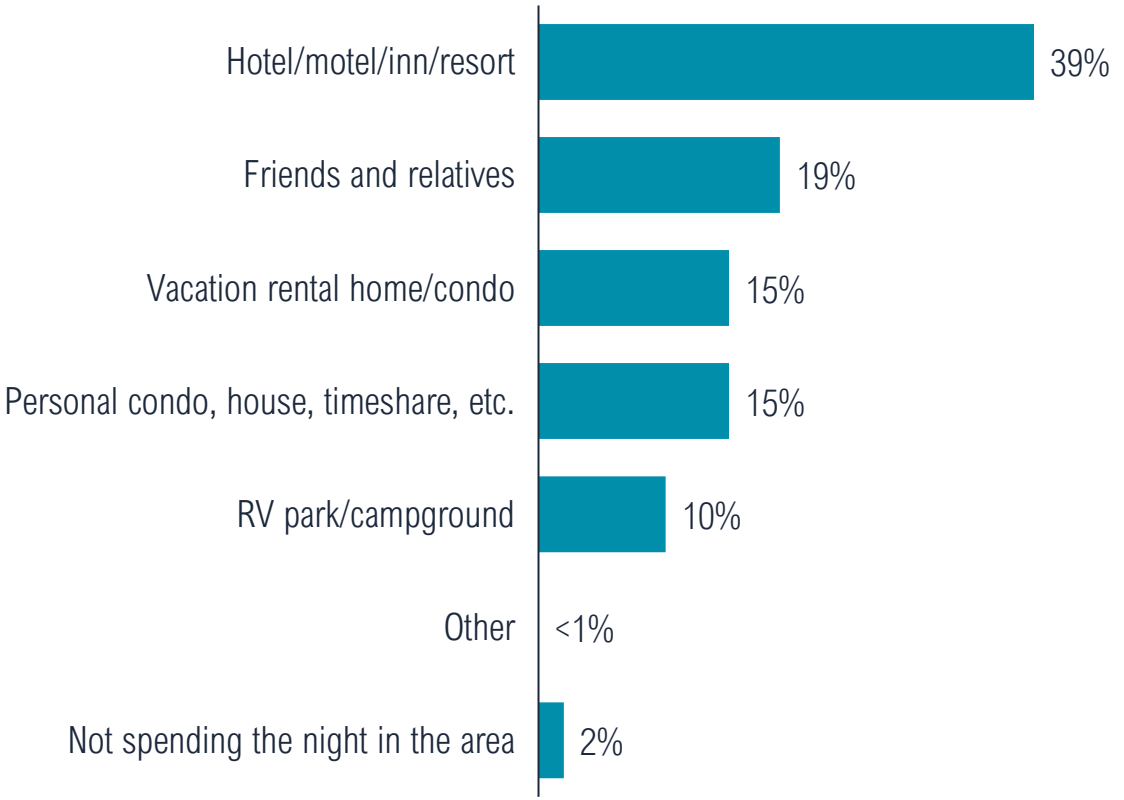
[1]Gender of person interviewed.

VISITOR JOURNEY: TRIP EXPERIENCE



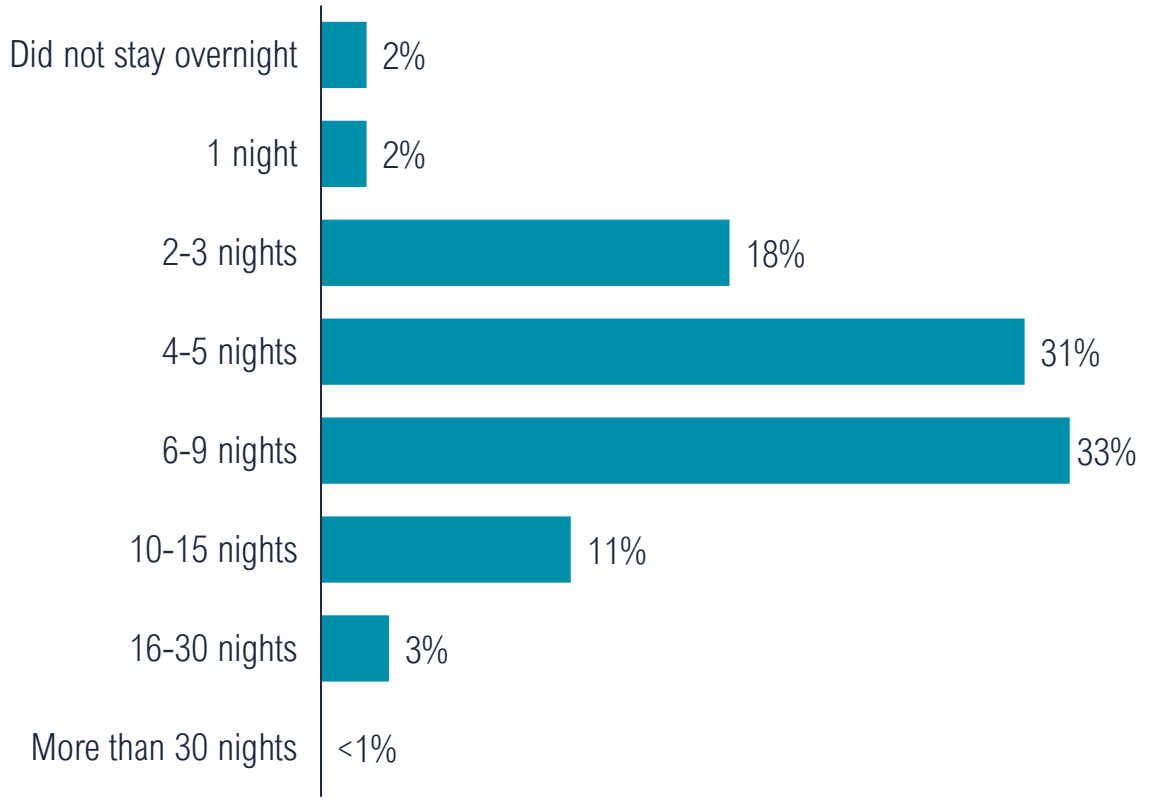
ACCOMMODATIONS

- 64% of visitors stayed in paid accommodations.



NIGHTS STAYED[1]

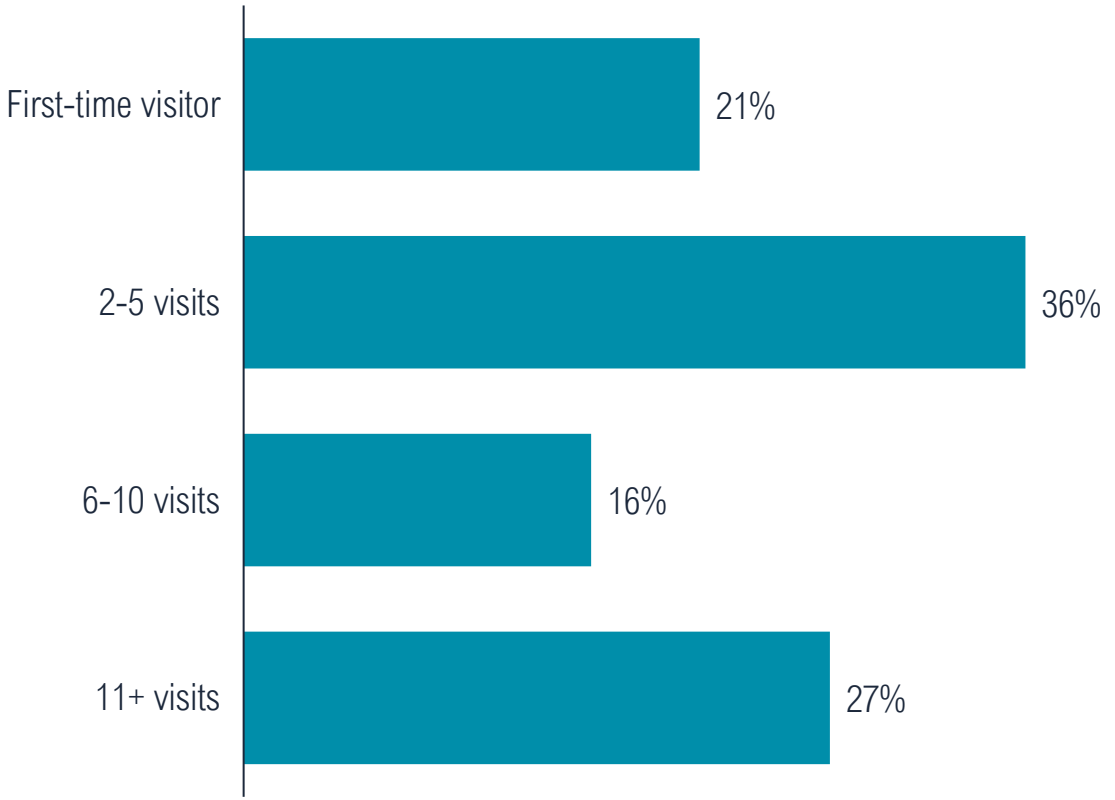
- Visitors spent an average of **5.8 nights** in the Fort Myers area.
- Visitors staying in paid accommodations spent an average of **5.4 nights** in the Fort Myers area.



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

FIRST TIME AND EXPERIENCED VISITORS

- 21% of visitors were visiting for the first time, while 27% were highly loyal visitors, having visited more than 10 times.



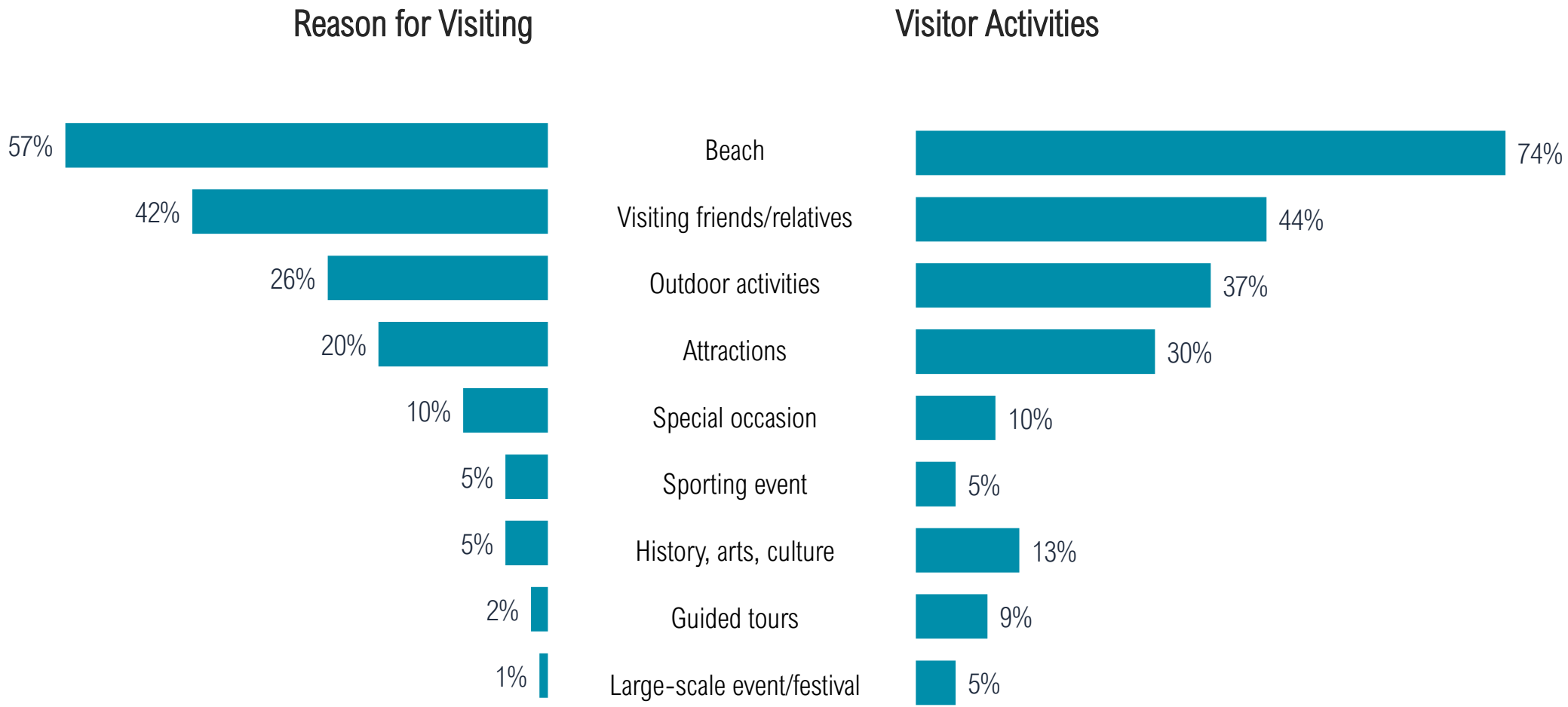
VISITOR ACTIVITIES[1]

- Going to the **beach**, **dining out**, **shopping**, and **visiting friends/relatives** are the most common visitor activities.



[1]Multiple responses permitted.

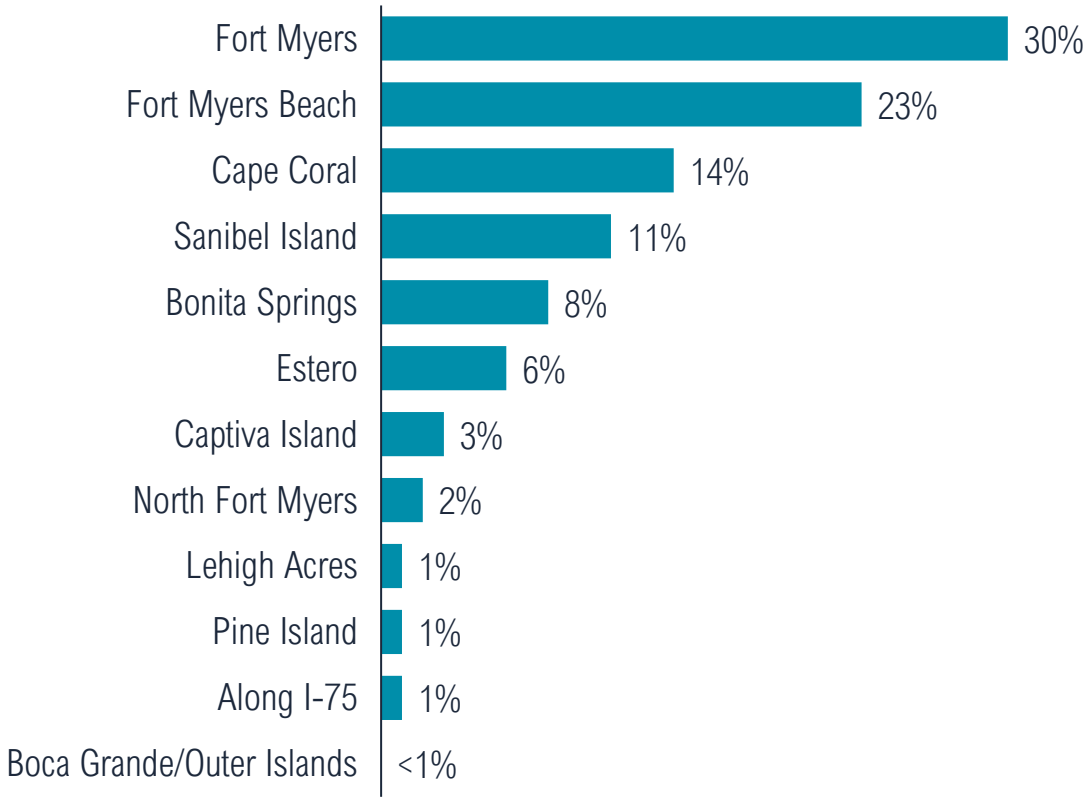
REASON FOR VISITING[1] VS. VISITOR ACTIVITIES[2]



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

COMMUNITY STAYED

- Most visitors to the area stayed in **Fort Myers** or **Fort Myers Beach**.



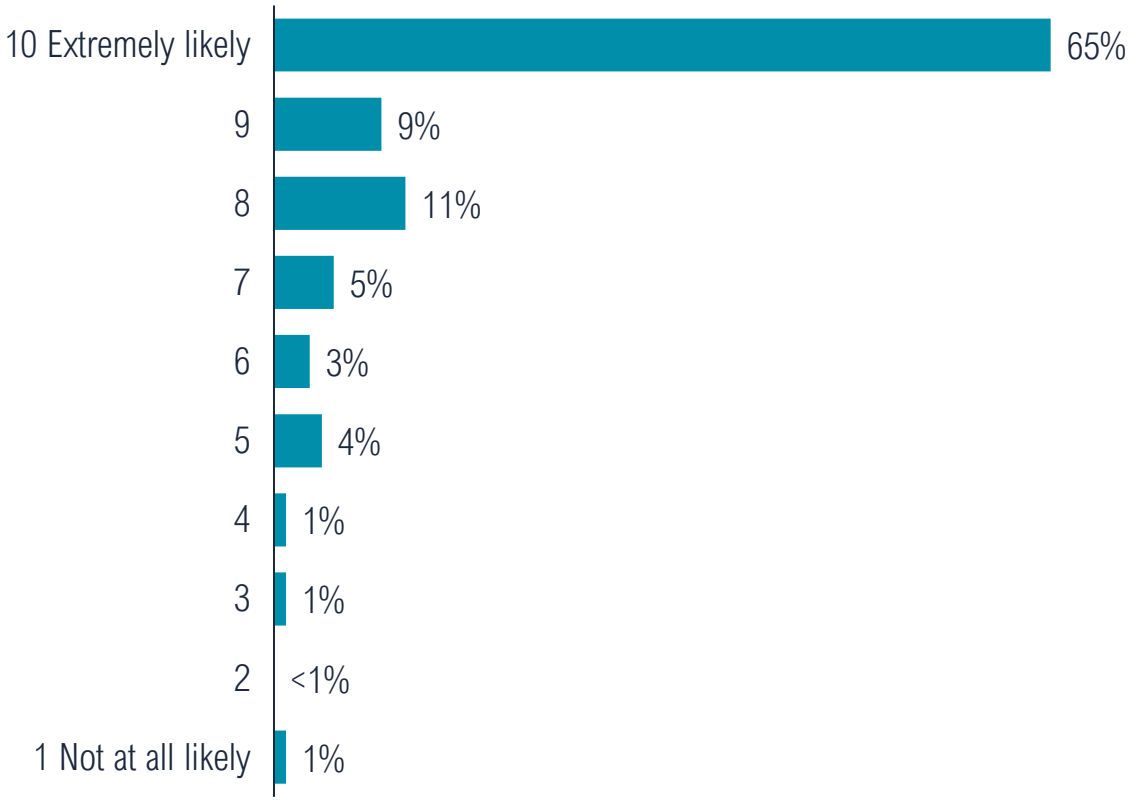
BASE: 98% of visitors who stayed overnight

VISITOR JOURNEY: POST-TRIP EVALUATION



LIKELIHOOD OF RECOMMENDING THE AREA

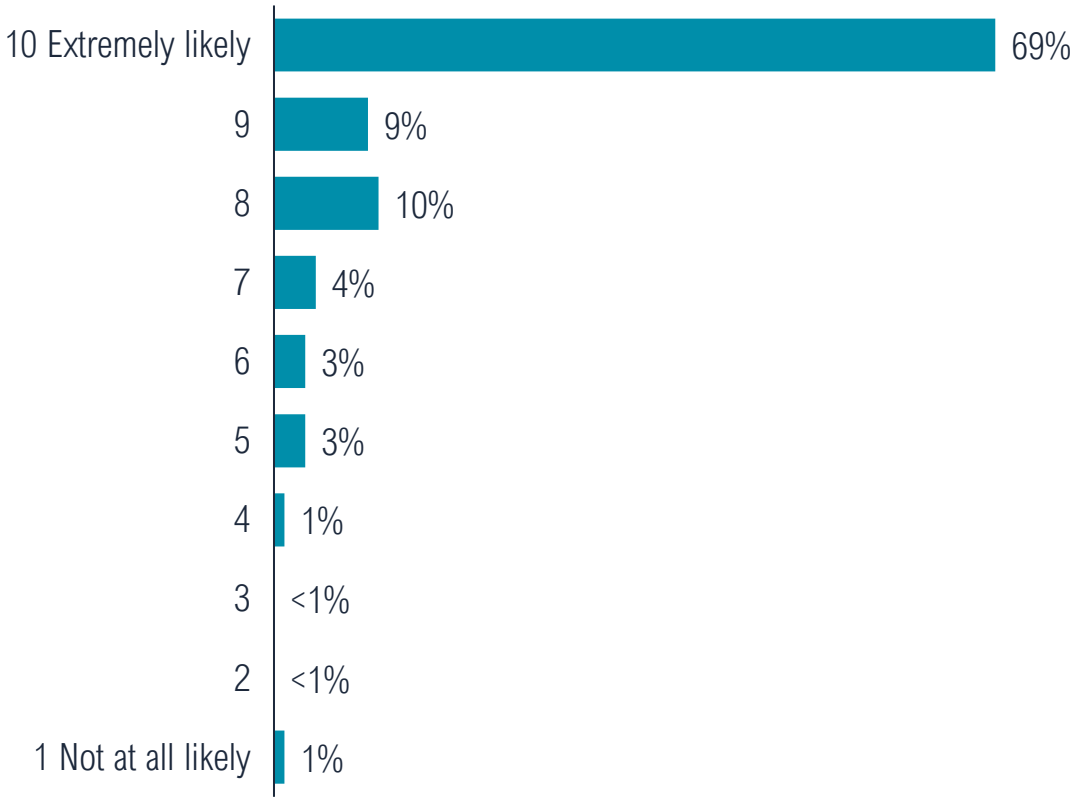
- Nearly 2 in 3 visitors are extremely likely to recommend the Fort Myers area to friends and family.
- Visitors have a Net Promoter Score[1] of 64.



[1]Net Promoter Score is determined by subtracting the percentage of visitors who answered 1-6 from the percentage of visitors who answered 9 or 10. The highest possible score is 100, and the lowest possible score is -100.

LIKELIHOOD OF RETURNING TO THE AREA

- Nearly 7 in 10 visitors are extremely likely to return to the Fort Myers area.



CROSSTABULATIONS: LIKELIHOOD OF RECOMMENDING

	1st Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2025	2026	2025	2026	2025	2026	2025	2026
Extremely likely to recommend[1]	54%	52%	65%	67%	62%	64%	65%	74%
Net Promoter Score[2]	*	51	*	67	*	63	*	75

[1] Question format changed, so not an exact like-for-like comparison, as the prior version used a 5-Point Likert Scale and the top choice was "Very Likely"

[2] Net Promoter Score is determined by subtracting the percentage of visitors who answered 1-6 from the percentage of visitors who answered 9 or 10. The highest possible score is 100, and the lowest possible score is -100.

*No figures available in 2025 because the format of this survey question changed in 2026.

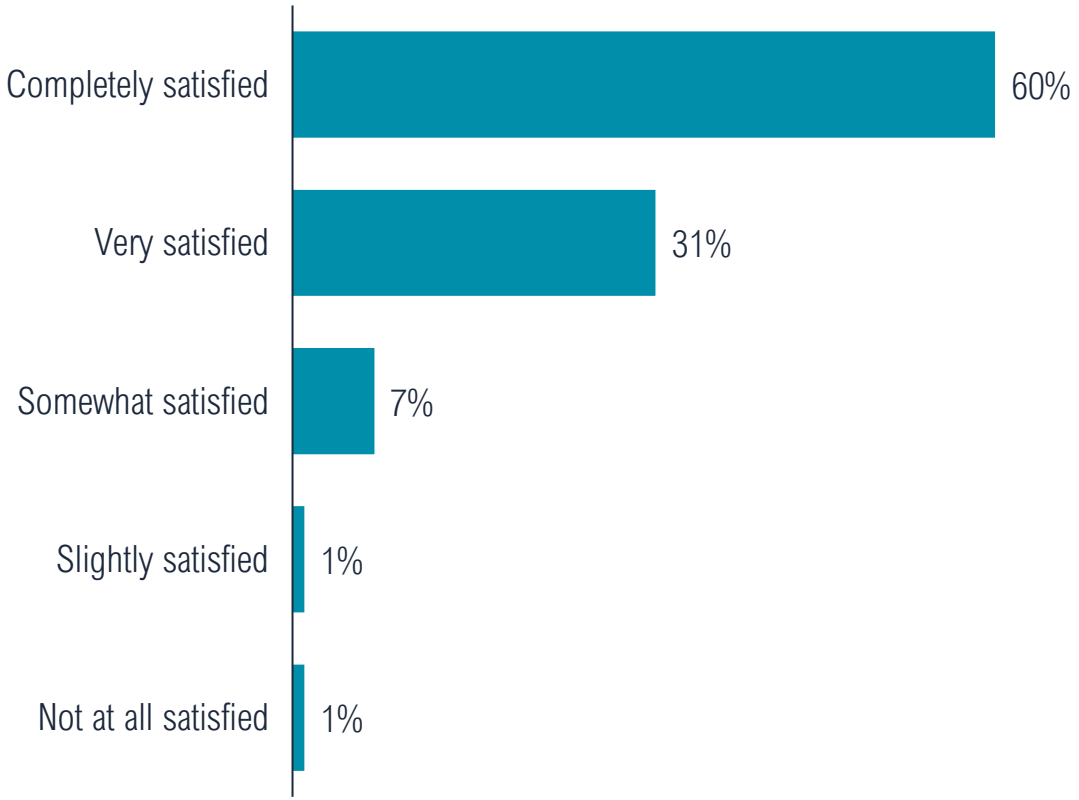
CROSSTABULATIONS: LIKELIHOOD OF RETURNING

	1st Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2025	2026	2025	2026	2025	2026	2025	2026
Extremely likely to return[1]	49%	41%	72%	75%	67%	69%	60%	70%

[1] Question format changed, so not an exact like-for-like comparison, as the prior version used a 5-Point Likert Scale and the top choice was "Very Likely".

SATISFACTION

- Over 9 in 10 visitors were either very or completely satisfied with their stay in the Fort Myers area.
- 60% were completely satisfied with their stay.



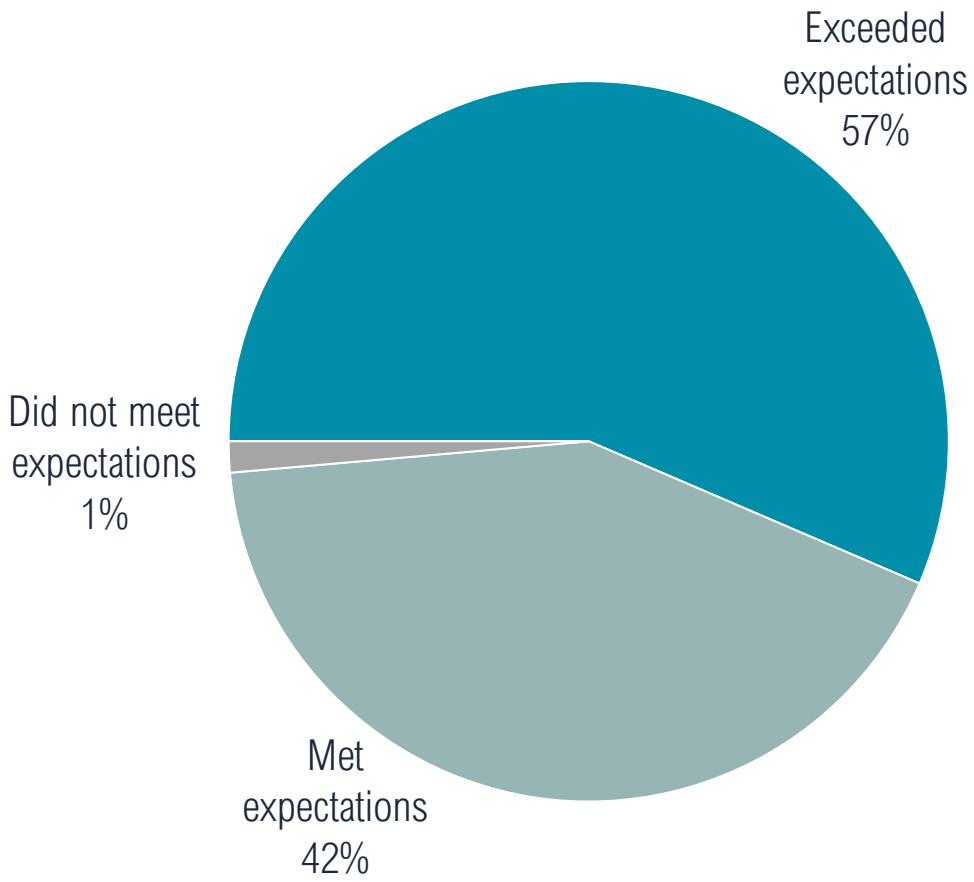
CROSSTABULATIONS: SATISFACTION

	1st Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2025	2026	2025	2026	2025	2026	2025	2026
Completely satisfied	*	50%	*	62%	*	60%	*	66%
Very satisfied	*	39%	*	29%	*	31%	*	29%
Somewhat satisfied	*	9%	*	7%	*	7%	*	2%
Slightly satisfied	*	2%	*	1%	*	1%	*	<1%
Not at all satisfied	*	<1%	*	1%	*	1%	*	3%

* No figures available in 2025 because the format of this survey question changed in 2026.

QUALITY OF ACCOMMODATIONS

- Over half of visitors said their accommodations exceeded their expectations, while 42% said their expectations were met.



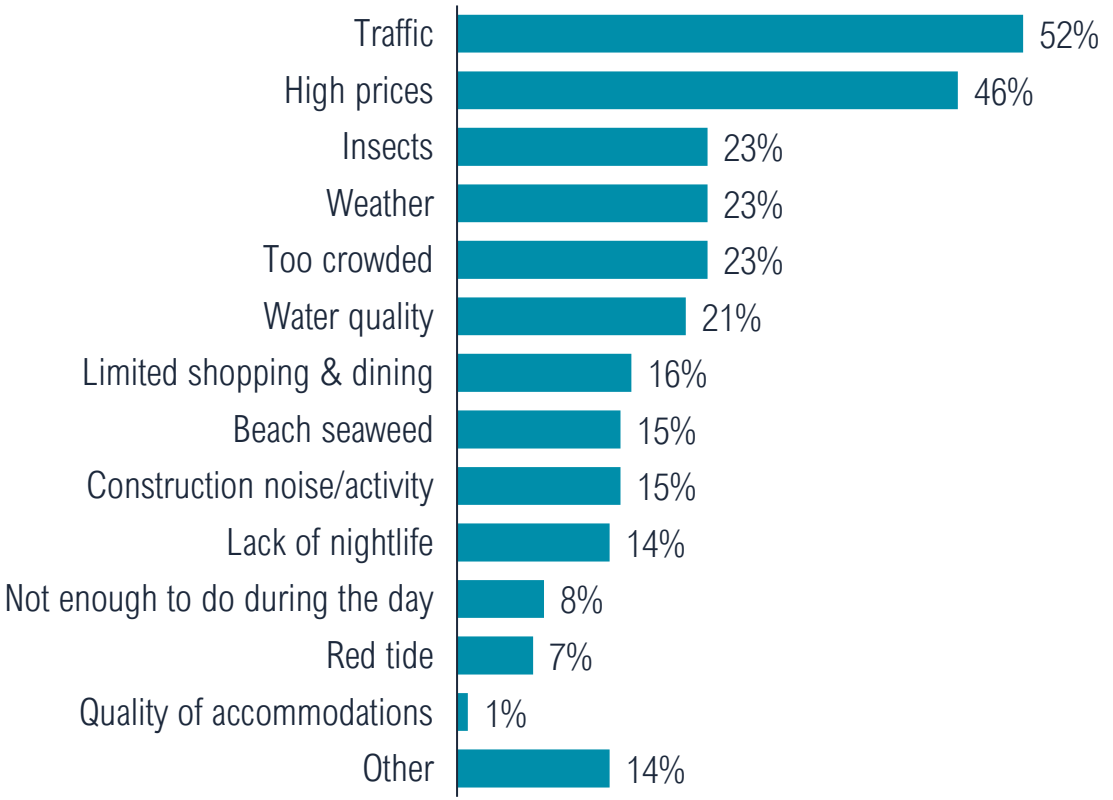
CROSSTABULATIONS: QUALITY OF ACCOMMODATIONS

	1st Time Visitors		Repeat Visitors		Domestic Visitors		Int'l Visitors	
	2025	2026	2025	2026	2025	2026	2025	2026
Exceeded Expectations	52%	46%	54%	60%	55%	56%	56%	63%
Met Expectations	46%	51%	44%	39%	43%	43%	42%	37%
Did Not Meet Expectations	2%	3%	2%	1%	2%	1%	2%	<1%

LEAST-LIKED FEATURES[1]

- Traffic and high prices were aspects of the Fort Myers area that visitors liked the least.

BASE: 9% of visitors who were not completely/very satisfied



[1]Only asked of visitors who were not completely or very satisfied with their visit.
Multiple responses permitted.
During this specific visit, which features have you liked LEAST about the Fort Myers area?

AREA DESCRIPTIONS



Peaceful and Relaxing

- "During this time of year, in the off season, it's magical. The beaches on Sanibel are incredibly peaceful and offer beautiful sunsets."
- "Cozy and quiet. Not for teenagers but perfect for adults wanting to relax."
- "Fort Myers is really nice, and I love how quiet it is compared to many other parts of Florida."



A Great Getaway

- "Fort Myers is amazing, and this is a great place to come visit for a short vacation."
- "The area is beautiful and very peaceful. Great place for a weekend getaway."
- "Nice weekend getaway. Affordable flights."

AREA DESCRIPTIONS



Beautiful Beaches

- “When you come to Bonita Beach in the morning, when the water is crystal clear and the water is calm, it's heaven on Earth.”
- “It is a beautiful area to visit with gorgeous beaches and so many seashells.”
- “Best place ever. The beaches are pristine and there is lots to do.”



A Convenient Location

- “Plenty of great places to visit, shop, eat, whatever your interests, Fort Myers has it all.”
- “Easy to navigate and the perfect amount of tourism and hometown feel.”
- “A nice area with everything nearby.”

OCCUPANCY BAROMETER[1]: OCT - DEC RESERVATIONS

Oct - Dec Reservations	Oct - Dec 2025	Oct - Dec 2026
Up	29%	25%
Same	30%	45%
Down	41%	30%

[1]Sources: DSG Occupancy Study
Accommodations partners were asked the following, "Please think about your reservations for the next three months. Compared to October through December of 2025, would you say the total level or reservations are up, the same, or down?"

OCCUPANCY BAROMETER[1]: JAN - MAR RESERVATIONS

Jan - Mar Reservations	Jan - Mar 2026	Jan - Mar 2027
Up	25%	20%
Same	35%	55%
Down	40%	25%

[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 2026, would you say the total level or reservations are up, the same, or down?"

Year-Over-Year Comparisons



ECONOMIC IMPACT

Visitor & Lodging Statistics	Jul - Sep 2025[3]	Jul - Sep 2026	% Change '25-'26
Visitors	762,800	895,500	+ 17.4%
Visitor Days	4,256,400	5,220,800	+ 22.7%
Room Nights	944,700	1,075,000	+ 13.8%
Direct Expenditures[1]	$643,172,500	$738,672,400	+ 14.8%
Total Economic Impact[2]	$822,492,100	$978,244,500	+ 18.9%
Occupancy	45.3%	47.5%	+ 5.0%
ADR	$139.90	$148.83	+ 6.4%
RevPAR	$63.32	$70.74	+ 11.7%

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

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

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

JOBS, WAGES AND TAXES SUPPORTED BY TOURISM[1]

	Jul - Sep 2025[4]	Jul - Sep 2026	% Change '25-'26
Direct Jobs[2]	4,050	4,610	+ 13.8%
Total Jobs[3]	5,690	6,530	+ 14.8%
Direct Wages[2]	$163,284,900	$191,219,000	+ 17.1%
Total Wages[3]	$251,520,300	$296,464,400	+ 17.9%
Direct Local Taxes[2]	$21,612,100	$24,583,300	+ 13.7%
Total Local Taxes[3]	$28,844,400	$33,217,700	+ 15.2%
Direct State Taxes[2]	$19,018,600	$21,652,200	+ 13.8%
Total State Taxes[3]	$25,578,700	$29,483,700	+ 15.3%

[1]Calculated using IMPLAN, an economic impact analysis software.
[2]Only accounts for money spent directly by visitors in categories such as accommodations, restaurants, entertainment, shopping, transportation, groceries, and "other" expenses.
3Accounts 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 revised to reflect an updated IMPLAN dataset.

VISITOR TYPE

Visitor Type	Jul - Sep 2025	Jul - Sep 2026
Paid accommodations	68%	64%
Non-paid accommodations	30%	34%
Day trippers	2%	2%

PRE-VISIT: TRIP PLANNING[1]

Planned Trip in Advance	Jul - Sep 2025	Jul - Sep 2026
1 week or less	6%	11%
2-3 weeks	16%	25%
1-2 months	37%	36%
3-5 months	28%	19%
6 months or more	13%	9%

[1]Survey question format changed in 2026.

PRE-VISIT: OTHER DESTINATIONS CONSIDERED[1,2]

Other Destinations Considered	Jul - Sep 2025	Jul - Sep 2026
Naples/Marco Island	7%	11%
Tampa/Clearwater/St. Petersburg	8%	8%
Miami/Ft. Lauderdale	5%	7%
Sarasota/Siesta Key	6%	7%
Keys/Key West	4%	7%
Orlando	5%	5%
Punta Gorda/Englewood Beach	3%	3%
Other FL destinations	6%	2%
Other U.S. destinations	*	2%
International destinations	*	<1%
Did not consider any other destination	68%	49%

[1]Multiple responses permitted.

[2]Survey question format changed in 2026. Figures for 2025 are omitted where comparable response options were unavailable.

PRE-VISIT: TRIP PLANNING WEBSITES/APPS[1,2]

Trip Planning Websites/Apps	Jul - Sep 2025	Jul - Sep 2026
Airline websites/apps	29%	30%
Hotel websites/apps	20%	25%
Online search engines (Google, etc.)	25%	23%
Social media	*	19%
Booking and vacation rental platforms	19%	18%
Traveler reviews, blogs, influencers	10%	9%
Trip planned by someone else	*	9%
VisitFortMyers.com	6%	8%
Tripadvisor	11%	7%
AI-based trip planning tools	*	5%
VisitFlorida.com	8%	4%
User-generated content platforms	*	2%
Event or festival website/app	*	2%
Video streaming services	*	2%
E-newsletter from Visit Fort Myers	*	1%
Audio streaming services	*	1%
Other	3%	2%
None / did not use online sources	21%	20%

[1]Multiple responses permitted.
[2]Survey question format changed in 2026. Figures for 2025 are omitted where comparable response options were unavailable.

PRE-VISIT: RECALL OF PROMOTIONS

Recall of Lee County Promotions	Jul - Sep 2025	Jul - Sep 2026
Yes	39%	37%
No	44%	49%
Can't recall	17%	14%
% of recallers influenced by promotions	62%	54%
% of total visitors influenced by promotions	24%	20%

PRE-VISIT: TYPE OF PROMOTIONS RECALLED[1,2]

Type of Promotions Recalled	Jul - Sep 2025[3]	Jul - Sep 2026[4]
Social media	41%	61%
Booking and vacation rental platforms	*	18%
Traveler reviews, blogs, influencers	17%	17%
VisitFortMyers.com	9%	17%
E-newsletter/email	7%	9%
TV or Video streaming services	9%	9%
Travel/visitor guide	11%	8%
User-generated content platforms	*	5%
Print media	*	5%
Cable or satellite television	13%	5%
Radio or audio streaming services	*	4%
AI-based trip planning tools	*	3%
Billboard/signage	5%	2%
AAA	4%	2%
Podcast	3%	2%
Other	3%	2%

[1]Multiple responses permitted.
[2]Survey question format changed in 2026. Figures for 2025 are omitted where comparable response options were unavailable.

[3]BASE: 39% of visitors who recalled promotions.

[4]BASE: 37% of visitors who recalled promotions.

PRE-VISIT: TRIP INFLUENCERS[1]

Trip Influencers	Jul - Sep 2025	Jul - Sep 2026
Peaceful / relaxing	87%	88%
Warm weather	84%	84%
A safe destination	84%	83%
White sandy beaches	82%	77%
Clean, unspoiled environment	79%	77%
Plenty to see and do	76%	72%
Memories of visiting/nostalgia	71%	70%
Value for your travel dollar	73%	66%
A “family” atmosphere	76%	65%
Reasonably priced lodging	71%	57%

[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[1,2]

Main Reason for Visiting	Jul - Sep 2025	Jul - Sep 2026
Beach	48%	57%
Visiting friends/relatives	31%	42%
Outdoor activities	*	26%
Attractions	10%	20%
I have a second home/rental property/etc. here	*	15%
Special occasion	9%	10%
Attend or participate in a sporting event/tournament	4%	5%
History, arts, culture, or museums	*	5%
Business conference or meeting	2%	2%
Guided tours	1%	2%
Large-scale event/festival	*	1%
Other	3%	7%

[1]Three responses permitted.

[2]Survey question format changed in 2026. Figures for 2025 are omitted where comparable response options were unavailable.

PRE-VISIT: BOOKING[1]

Booking Method	Jul - Sep 2025	Jul - Sep 2026
Directly with the hotel/condo/campground	41%	52%
Booking or vacation rental platform	48%	36%
Through a vacation rental company	8%	7%
Other	3%	5%

[1]Survey question format changed in 2026. Figures for 2025 are omitted where comparable response options were unavailable.

PRE-VISIT: TRANSPORTATION[1]

Transportation	Jul - Sep 2025	Jul - Sep 2026[2]
Fly or combination fly/drive	67%	75%
Drive a personal or rental car	32%	28%
Drive a personal or rental RV	1%	2%
Tour bus	<1%	<1%
Other	<1%	<1%

Airport Used[2]	Jul - Sep 2025[3]	Jul - Sep 2026[4]
Southwest Florida International	84%	86%
Punta Gorda	7%	6%
Orlando International	1%	2%
Fort Lauderdale-Hollywood International	3%	2%
Tampa International	2%	1%
Sarasota-Bradenton International	*	1%
Miami International	2%	1%
Other	1%	1%

[1]Survey question format changed in 2026. Figures for 2025 are omitted where comparable response options were unavailable.
[2]Multiple responses permitted.
[3]BASE: 67% of visitors who flew.
[4]BASE: 75% of visitors who flew.

TRAVEL PARTY PROFILE: ORIGIN

Origin Region[1]	Jul – Sep 2025	Jul – Sep 2026
Florida	7.0%	8.8%
Southeast	20.7%	19.8%
Northeast	22.6%	22.8%
Midwest	31.1%	30.5%
West	8.8%	8.7%
Canada	4.2%	4.0%
UK	1.0%	0.9%
Germany	2.1%	2.3%
Other Europe	1.3%	1.1%
Other International	1.2%	1.1%

Origin Market[1]	Jul – Sep 2025	Jul – Sep 2026
New York City	7.5%	5.9%
Chicago	4.4%	5.1%
Atlanta	4.1%	3.7%
Cleveland-Akron	2.2%	3.5%
Philadelphia	2.7%	3.4%
Denver	2.1%	2.7%
Indianapolis	2.3%	2.4%
Cincinnati	1.7%	2.2%
Boston	1.7%	2.1%
Miami-Fort Lauderdale	2.6%	2.0%
Washington, DC-Hagerstown	1.8%	1.8%
Dallas-Fort Worth	1.7%	1.8%
Minneapolis-St. Paul	1.9%	1.7%
Detroit	2.2%	1.6%
Nashville	1.7%	1.6%
Pittsburgh	1.5%	1.6%
Tampa-St. Petersburg	1.8%	1.5%
St. Louis	1.1%	1.5%

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

TRAVEL PARTY PROFILE: PARTY SIZE AND COMPOSITION

Travel Parties	Jul - Sep 2025	Jul - Sep 2026
Mean travel party size[1]	2.8	2.7
Travel with children under age 18	36%	29%

Travel Party Composition	Jul - Sep 2025	Jul - Sep 2026
As a couple	36%	41%
As a family	40%	32%
By yourself	15%	15%
With other couples/friends	8%	10%
With business associates	1%	1%
In a tour group	<1%	<1%
Other	<1%	1%

[1]Sources: Occupancy Study and Visitor Tracking Study

TRAVEL PARTY PROFILE: DEMOGRAPHICS

Age	Jul - Sep 2025	Jul - Sep 2026
Median Age	48	52

Household Income	Jul - Sep 2025	Jul - Sep 2026
Median Income	$111,100	$125,000

Gender[1]	Jul - Sep 2025	Jul - Sep 2026
Female	54%	65%
Male	46%	34%
Other	<1%	1%

[1]Gender of person interviewed.

TRIP EXPERIENCE: LENGTH OF STAY AND REPEAT VISITORS

Length of Stay[1]	Jul - Sep 2025	Jul - Sep 2026
Average nights in the Fort Myers area	5.6	5.8

First Time/Repeat Visitors	Jul - Sep 2025	Jul - Sep 2026
First-time	25%	21%
Repeat	75%	79%

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

TRIP EXPERIENCE: ACCOMMODATIONS

Type of Accommodations	Jul - Sep 2025	Jul - Sep 2026
Hotel/motel/inn/resort	42%	39%
Friends and relatives	15%	19%
Vacation rental home/condo	16%	15%
Personal condo, house, timeshare, etc.	13%	15%
RV park/campground	9%	10%
Other (including Bed & Breakfast)	3%	<1%
Not spending the night in the area	2%	2%

TRIP EXPERIENCE: ACTIVITIES[1,2]

Activities	Jul - Sep 2025	Jul - Sep 2026
Beach, collecting shells, etc.	65%	74%
Restaurants	67%	69%
Shopping	47%	48%
Visit friends and relatives	44%	44%
Outdoor activities	*	37%
Attractions	20%	30%
Bars, nightclubs	15%	20%
History, arts, culture, or museums	*	13%
Special occasion	9%	10%
Guided tours	8%	9%
Photography	7%	9%
Attend or participate in a sporting event/tournament	5%	5%
Large-scale event/festival	*	5%
Spas	6%	4%
Other	3%	2%

[1]Multiple responses permitted.
[2]Survey question format changed in 2026. Figures for 2025 are omitted where comparable response options were unavailable.

TRIP EXPERIENCE: COMMUNITY STAYED

Community Stayed	Jul - Sep 2025	Jul - Sep 2026
Fort Myers	34%	30%
Fort Myers Beach	20%	23%
Cape Coral	12%	14%
Sanibel Island	9%	11%
Bonita Springs	8%	8%
Estero	7%	6%
Captiva Island	4%	3%
North Fort Myers	4%	2%
Lehigh Acres	2%	1%
Pine Island	<1%	1%
Along I-75	<1%	1%
Boca Grande/Outer Islands	<1%	<1%

POST-TRIP EVALUATION: RECOMMENDING[1] AND RETURNING[1]

Likelihood of Recommending the Area	Jul - Sep 2025	Jul - Sep 2026
Extremely likely to recommend	62%	65%
Net Promoter Score[2]	*	64

Likelihood of Returning to the Area	Jul - Sep 2025	Jul - Sep 2026
Extremely likely to return	66%	69%

[1]Survey question format changed in 2026. Figures for 2025 are omitted where roughly comparable response options were unavailable.
[2]Net Promoter Score is determined by subtracting the percentage of visitors who answered 1-6 from the percentage of visitors who answered 9 or 10. The highest possible score is 100, and the lowest possible score is -100.

POST-TRIP EVALUATION: QUALITY OF ACCOMMODATIONS

Accommodation Quality	Jul - Sep 2025	Jul - Sep 2026
Exceeded your expectations	54%	56%
Met your expectations	44%	42%
Did not meet your expectations	2%	1%

POST-TRIP EVALUATION: SATISFACTION[1]

Satisfaction with Visit	Jul - Sep 2025	Jul - Sep 2026
Completely satisfied	*	60%
Very satisfied	*	31%
Somewhat satisfied	*	7%
Slightly satisfied	*	1%
Not at all satisfied	*	1%

[1]Survey question format changed in 2026. Figures for 2025 are omitted where comparable response options were unavailable.

POST-TRIP EVALUATION: LEAST-LIKED FEATURES[1,2]

Least Liked Features	Jul - Sep 2025	Jul - Sep 2026[3]
Traffic	23%	52%
High prices	14%	46%
Insects	22%	23%
Weather	10%	23%
Too crowded	*	23%
Water quality	6%	21%
Limited shopping & dining	*	16%
Beach seaweed	10%	15%
Construction noise/activity	9%	15%
Lack of nightlife	6%	14%
Not enough to do during the day	*	8%
Red tide	5%	7%
Quality of accommodations	3%	1%
Other	5%	14%

[1]Multiple responses permitted.

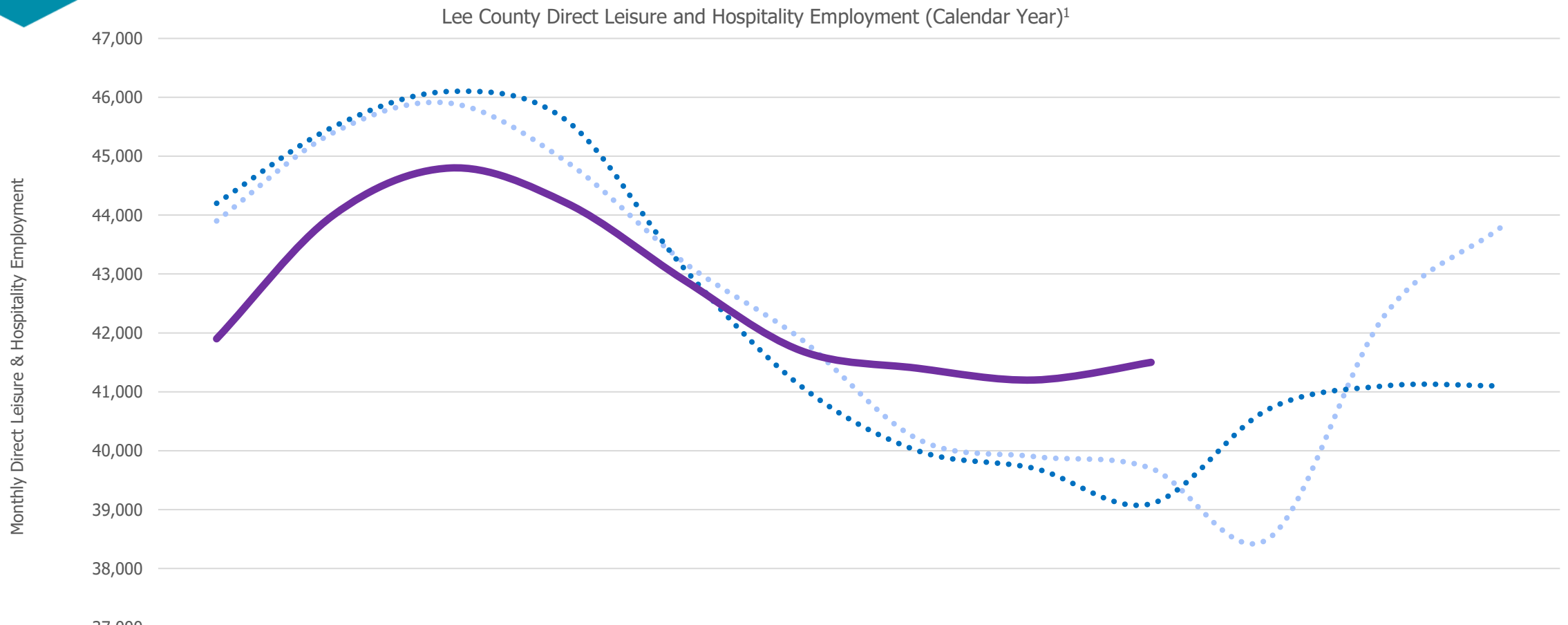
[2]Survey question format changed in 2026. Figures for 2025 are omitted where comparable response options were unavailable.

[3]Only asked of visitors who were not completely or very satisfied with their visit.
BASE: 9% of visitors who were not completely/very satisfied.

Industry Data



LEISURE & HOSPITALITY EMPLOYMENT

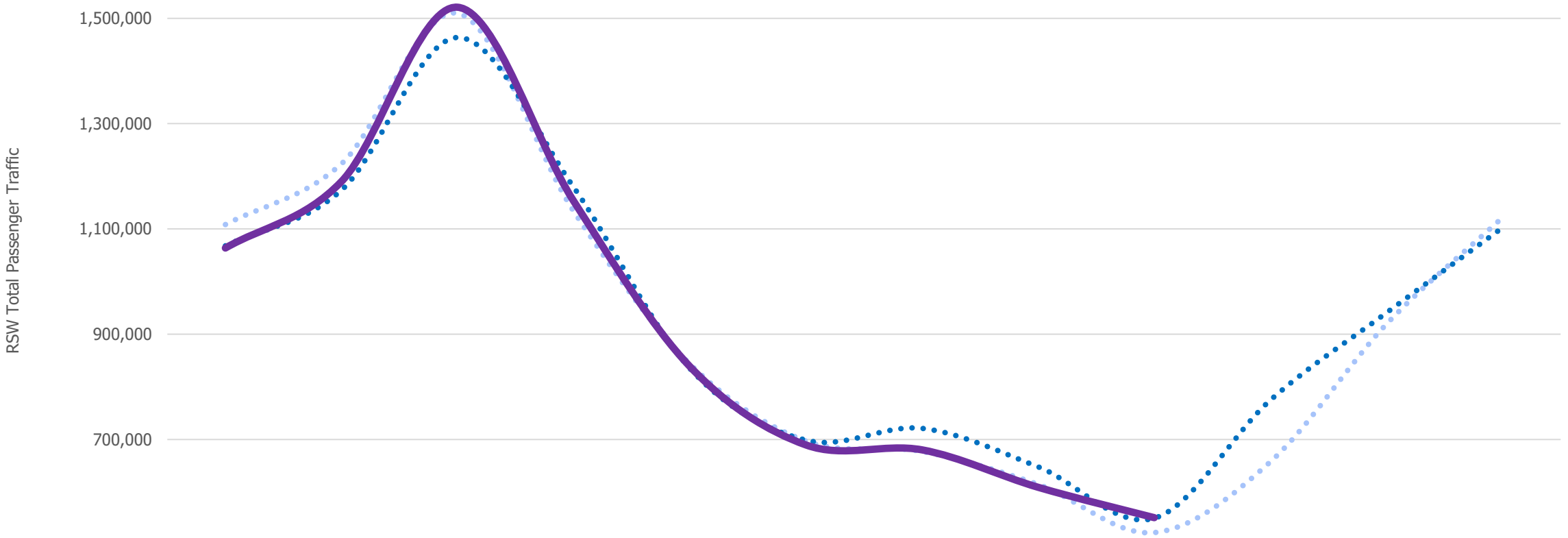


	January	February	March	April	May	June	July	August	September	October	November	December
2024	43,900	45,400	45,900	44,900	43,200	41,900	40,200	39,900	39,700	38,500	42,300	43,800
2025	44,200	45,500	46,100	45,600	43,100	41,100	40,000	39,700	39,100	40,700	41,100	41,100
2026	41,900	44,000	44,800	44,200	42,900	41,700	41,400	41,200	41,500 (P)			

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

RSW TOTAL PASSENGER TRAFFIC

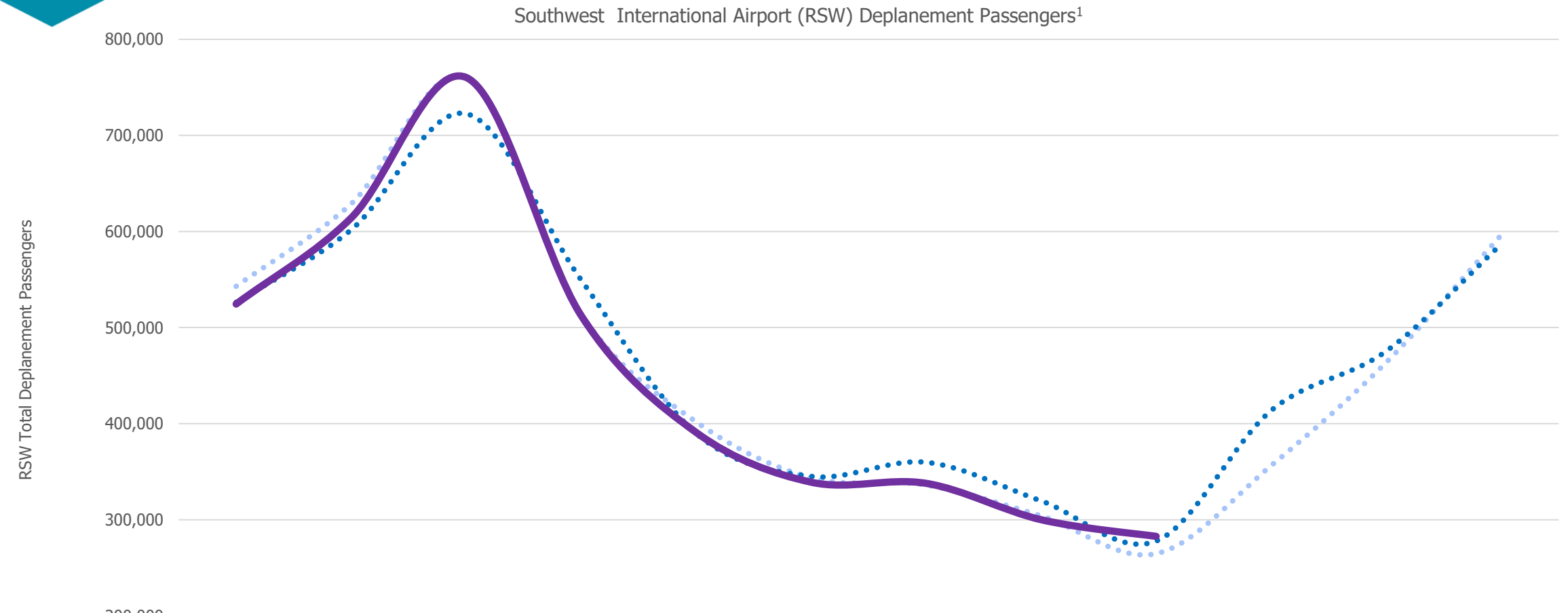
Southwest Florida International Airport (RSW) Total Passenger Traffic[1]



	January	February	March	April	May	June	July	August	September	October	November	December
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
2026	1,063,645	1,190,070	1,521,149	1,152,669	838,639	689,514	680,168	609,026	551,322			

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

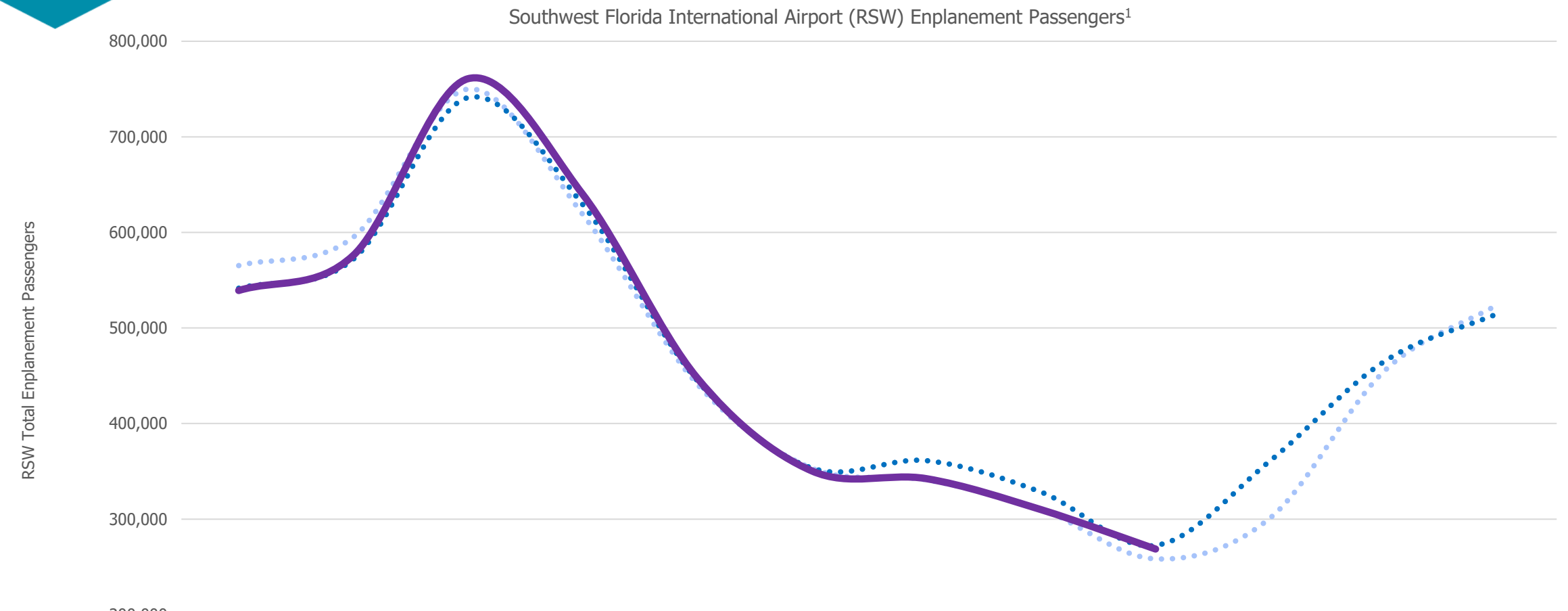
RSW DEPLANEMENT PASSENGERS



	January	February	March	April	May	June	July	August	September	October	November	December
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
2026	524,451	614,075	760,329	512,534	390,838	339,047	337,841	299,982	282,645			

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

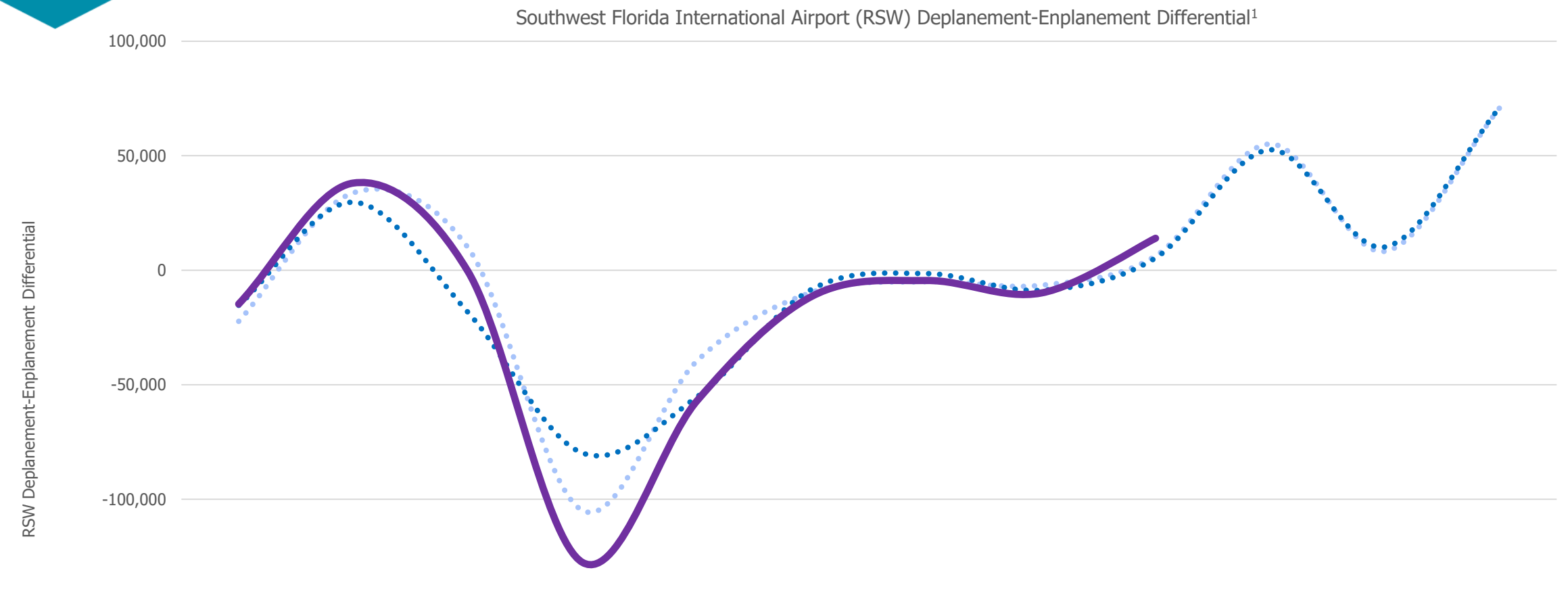
RSW ENPLANEMENT PASSENGERS



	January	February	March	April	May	June	July	August	September	October	November	December
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
2026	539,194	575,995	760,820	640,135	447,801	350,467	342,327	309,944	268,677			

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

RSW DEPLANEMENT-ENPLANEMENT DIFFERENTIAL



	January	February	March	April	May	June	July	August	September	October	November	December
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
2026	-14,743	38,080	-491	-127,601	-56,963	-11,420	-4,486	-9,962	13,968			

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

LICENSED TRANSIENT RENTAL UNITS

Licensed Transient Rental Units in Lee County, as of October 1st, 2026[1]					
Lee County Area	Hotel	Motel	Bed & Breakfast	Vacation Rental	Total
FORT MYERS	6,226	1,090	9	967	**8,292**
CAPE CORAL	584	192	-	3,210	**3,986**
FORT MYERS BEACH	861	386	6	2,403	**3,656**
BONITA SPRINGS	1,244	38	-	900	**2,182**
SANIBEL	68	688	-	1,338	**2,094**
NORTH FORT MYERS	-	578	-	62	**640**
ESTERO	566	-	-	20	**586**
CAPTIVA	107	156	-	278	**541**
BOCA GRANDE	77	107	-	280	**464**
LEHIGH ACRES	75	-	-	201	**276**
SAINT JAMES CITY	-	20	-	65	**85**
BOKEELIA	-	22	-	48	**70**
MATLACHA	-	-	2	33	**35**
CABBAGE KEY	-	9	-	-	**9**
ALVA	-	-	-	4	**4**
Total	**9,808**	**3,286**	**17**	**9,809**	**22,920[2]**

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

Methodology

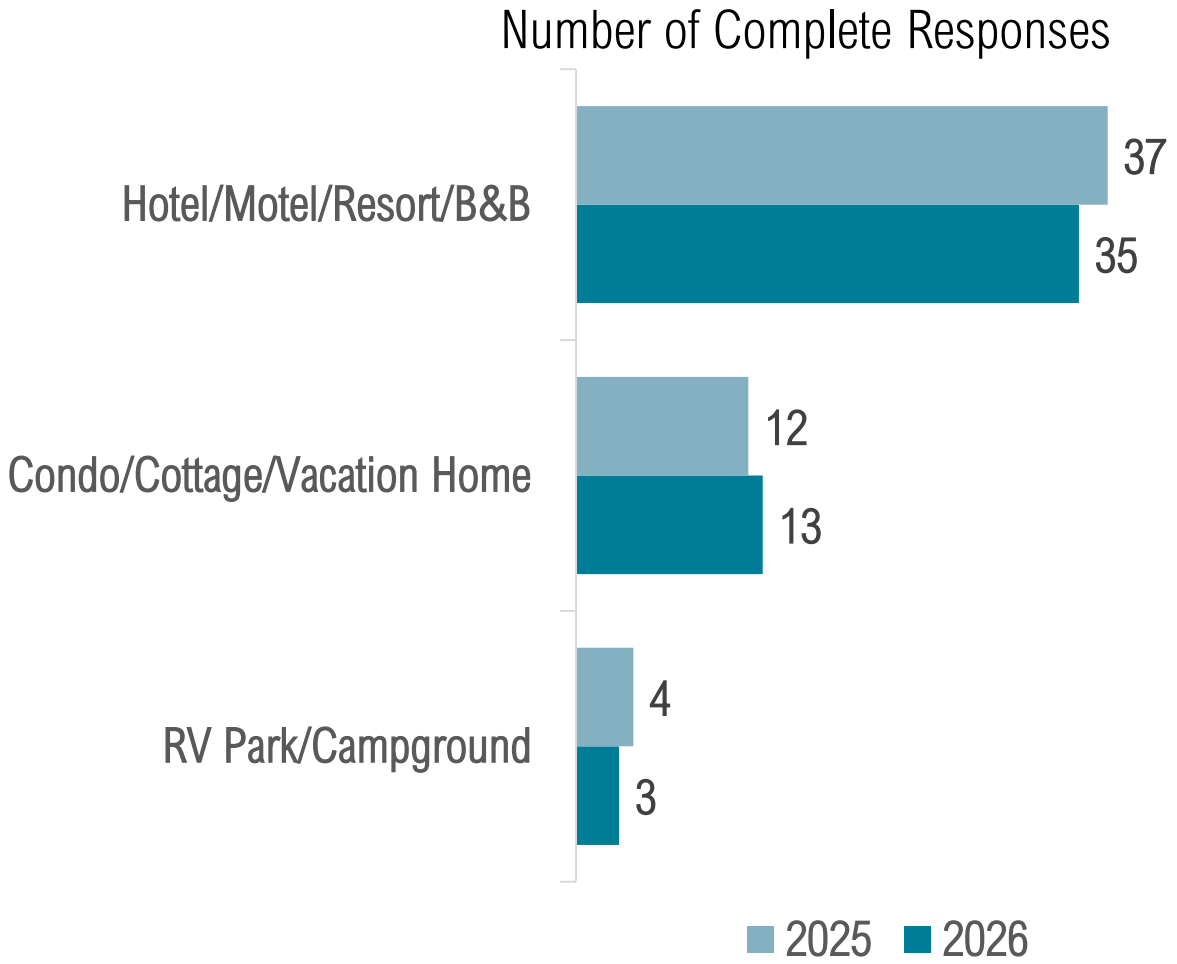


METHODOLOGY: ECONOMIC IMPACT

- Economic Impact of tourism in Lee County is derived from:
  - Visitor Tracking Study
    - 890 surveys in public areas, hotels, at events around Lee County, and online via email or social media
    - Target individuals: July - September visitors to Lee County
    - Data Collection: July - September 2026
  - Occupancy Study
    - Email and telephone surveys of hotels, rental management companies, EV/campgrounds, etc., as well as data from STR and KeyData reports
    - Sample Size - data from 4,950 hotel/rental/campground units (51 properties) reporting to DSG, 11,054 hotel units reporting to STR (91 properties), and 3,263 rental units 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

- Occupancy Study
  - Internet and telephone surveys of hotels, rental management companies, RV/campgrounds, etc.
    - Sample Size: 51 completed surveys
    - Data Collection: Completed in October 2026 (for July – September 2026)
  - Total Sample Size:
    - Data from 4,950 hotel/rental/campground units reporting to DSG (representing 51 properties)
    - Data from 11,054 hotel units reporting to STR (representing 91 properties)
    - Data from 3,263 rental units reporting to KeyData



Fort Myers – Islands, Beaches and Neighborhoods

Lee County VCB

July - September 2026

Visitor Tracking, Occupancy, & Economic Impact Study

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fort MYERS ISLANDS, BEACHES & NEIGHBORHOODS

downs & st. germain RESEARCH