Visit Sarasota County
Economic Impact of Tourism

FISCAL YEAR 2026



VISIT Sarasota COUNTY

downs & st. germain RESEARCH

INTRODUCTION & METHODOLOGY



INTRODUCTION

- The economic impact of tourism on Sarasota County is based on data collected from 3,614 visitors to Sarasota County. Interviews were conducted throughout the county and online.

- Total economic impact of tourism on Sarasota County is a function of direct spending by visitors in Sarasota County & induced + indirect effects of this spending.

  → Indirect effects are increased business spending resulting from tourism dollars.
  → Induced effects are increased household spending resulting from tourism dollars.

- Downs & St. Germain Research uses IMPLAN[1] to calculate the economic multiplier for Sarasota County.



[1]Over 1,500 organizations use IMPLAN, which has been used to model the economic impact of tourism since 1992. Agencies such as FEMA, EPA, Federal Reserve Bank, and Bureau of Land Management use IMPLAN.

STUDY METHODS

- Economic impact of tourism for Sarasota County was based on data from the following sources:
  - 3,614 on-site and online interviews conducted by Downs & St. Germain Research with visitors staying in paid accommodations, staying with friends and relatives, and day visitors to Sarasota County.
  - ADR statistics provided by properties in Sarasota County, STR, and Key Data
  - Downs & St. Germain Research's tourism databases
  - Various government agencies and data sources
  - IMPLAN Economic Impact Modeling software
  - TDT Collections provided by Sarasota County



FY 2026 ECONOMIC IMPACT OF TOURISM



FY 2026 ECONOMIC IMPACT SNAPSHOT



- Visitation metrics for FY 2026 show a return towards more typical patterns compared to FY 2025, a year which was influenced by hurricane recovery.
- The number of visitors increased from FY 2025, resulting in an increase in direct spending and total economic impact.
- Occupancy decreased from FY 2025 partly due to fewer stays related to hurricanes (recovery workers, displaced residents, etc.) and more available units. Despite lower occupancy, RevPAR increased slightly due to an increase in room rates.

58.9%

OCCUPANCY RATE

↓ 6.9% from FY 2025

$304.91

AVERAGE DAILY RATE

↑ 8.8% from FY 2025

$179.68

REVENUE PER ROOM

↑ 1.3% from FY 2025

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KPIs – 3-YEAR TREND FOR ALL VISITORS[1]

Economic Indicators	FY 2024	FY 2025	FY 2026	% Change FY25-FY26
All visitors	2,894,100	2,710,700	2,759,900	+1.8%
Direct expenditures	$2,548,391,500	$2,370,201,800	$2,449,209,200	+3.3%
Total economic impact[2]	$3,519,663,900	$3,283,672,600	$3,441,294,100	+4.8%
Direct jobs supported[2]	17,810	15,990	15,950	-0.3%
Total jobs supported[2,3]	25,140	22,600	22,700	+0.4%
Direct wages supported[2]	$601,274,000	$555,351,300	$568,211,000	+2.3%
Total wages supported[2,3]	$1,006,618,100	$930,185,700	$959,289,400	+3.1%
Total County Taxes supported[2]	$120,007,200	$112,229,600	$118,106,600	+5.2%

[1]Includes visitors staying in paid accommodations, with friends and relatives, visitors staying in their own condos and timeshares, and day visitors. The economic impact analysis process has been updated to align more closely with current IMPLAN data models. As a result, previous years' figures have been revised using the updated methodology. This Economic Impact analysis accounts for leakage outside of Sarasota County (i.e., the cost of wholesale and retail trade services that do not continue to circulate within the county's economy).
[2]FY 2024-FY 2025 figures have been updated using most recent IMPLAN model.
[3]Includes direct, indirect, and induced jobs/wages.

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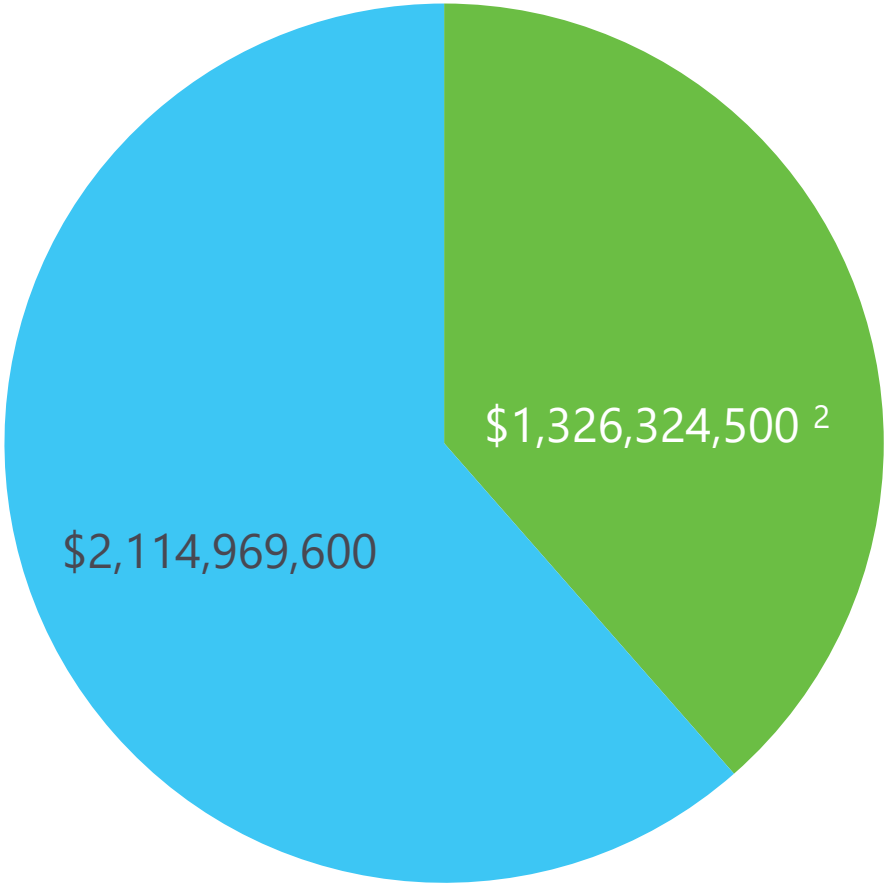
KPIs – 3-YEAR TREND FOR VISITORS STAYING IN PAID ACCOMMODATIONS

Metrics	FY 2024	FY 2025	FY 2026	% Change FY25-FY26
Visitors	1,423,880	1,317,400	1,341,300	+1.8%
Direct expenditures	$1,740,106,100	$1,648,464,800	$1,680,141,500	+1.9%
Total economic impact[1]	$2,560,099,500	$2,407,903,000	$2,522,948,800	+4.8%
Room nights generated	3,281,800	3,086,000	2,977,000	-9.3%
Tourist Development Tax	$48,133,858	$47,554,414	$54,463,705	+14.5%
Occupancy	64.8%	63.3%	58.9%	-6.9%
Room rates	$262.69	$280.27	$304.91	+8.8%
RevPAR	$170.22	$177.41	$179.68	+1.3%
Spending/person/trip	$1,222	$1,251	$1,253	+0.2%
Spending/person/day	$171	$167	$159	-4.8%

[1]FY 2024-FY 2025 figures have been updated using most recent IMPLAN model.
The economic impact analysis process has been updated to align more closely with current IMPLAN data models. As a result, previous years' figures have been revised using the updated methodology. This Economic Impact analysis accounts for leakage outside of Sarasota County (i.e., the cost of wholesale and retail trade services that do not continue to circulate within the county's economy).

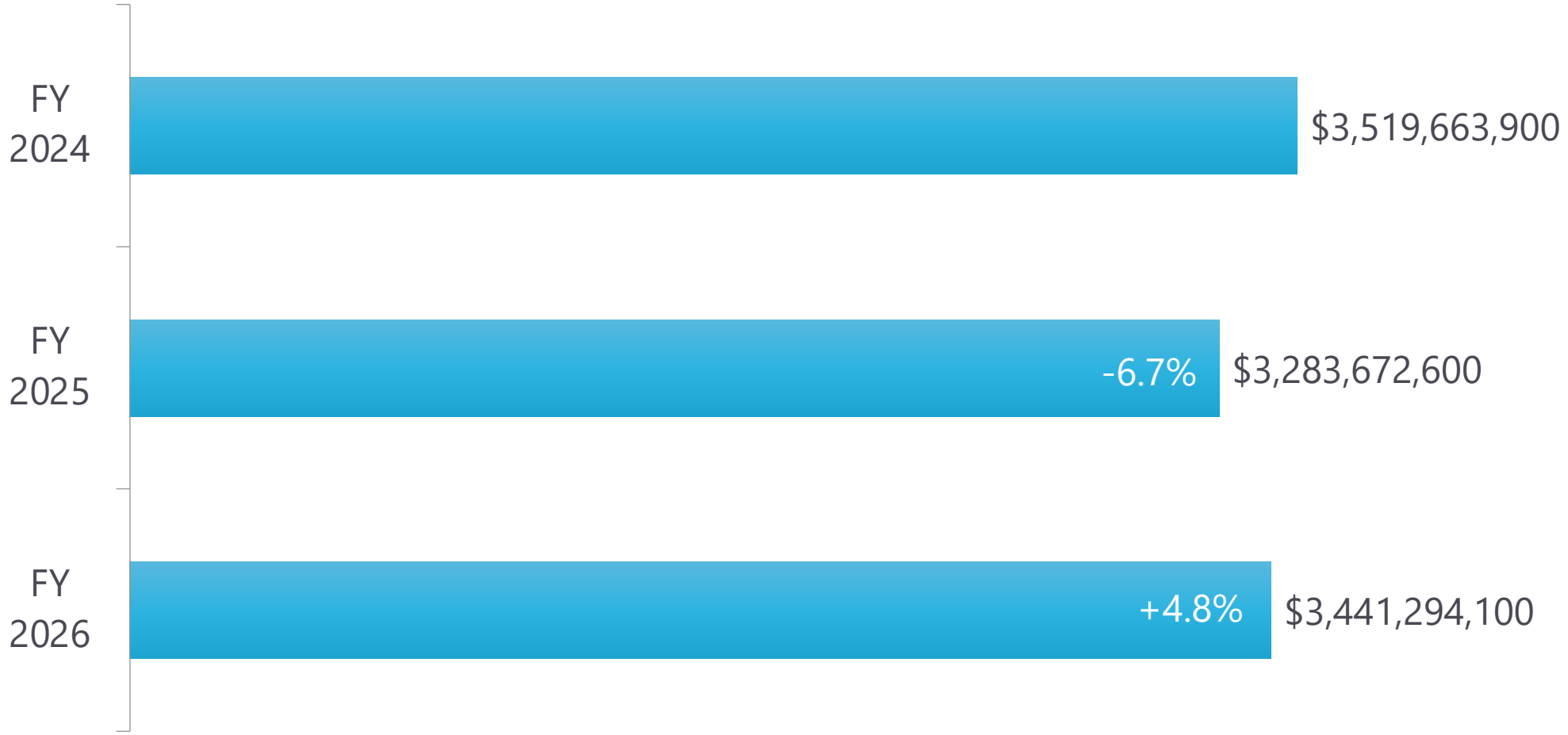
TOTAL ECONOMIC IMPACT OF TOURISM – FY 2026

The total economic impact of tourism in Sarasota County in FY 2026 was **$3,441,294,100[1]**



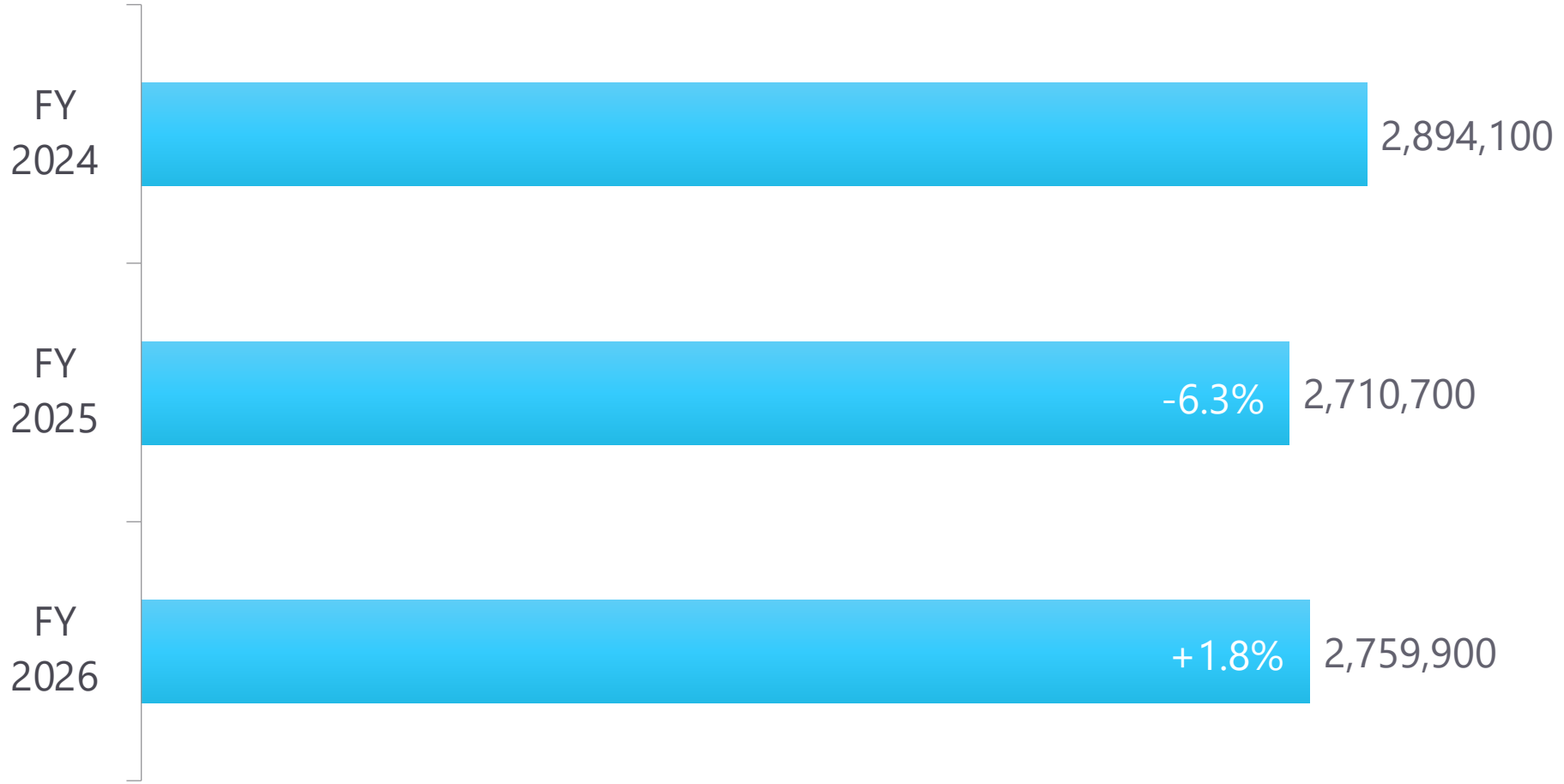
[1]Includes all visitors.
The economic impact analysis process has been updated to align more closely with current IMPLAN data models. As a result, previous years' figures have been revised using the updated methodology. This Economic Impact analysis accounts for leakage outside of Sarasota County (i.e., the cost of wholesale and retail trade services that do not continue to circulate within the county's economy).
[2]Indirect effects are increased business spending resulting from tourism dollars.

TOTAL ECONOMIC IMPACT[1] 3-YEAR TREND



[1]Includes all visitors.
The economic impact analysis process has been updated to align more closely with current IMPLAN data models. As a result, previous years' figures have been revised using the updated methodology. This Economic Impact analysis accounts for leakage outside of Sarasota County (i.e., the cost of wholesale and retail trade services that do not continue to circulate within the county's economy).

TOTAL NUMBER OF VISITORS – 3-YEAR TREND[1]



[1]Estimate includes visitors who stayed in paid accommodations, visitors who stayed with friends and relatives, and visitors who come for the day but did not spend the night in Sarasota County.

HOUSEHOLD TAX CONTRIBUTION

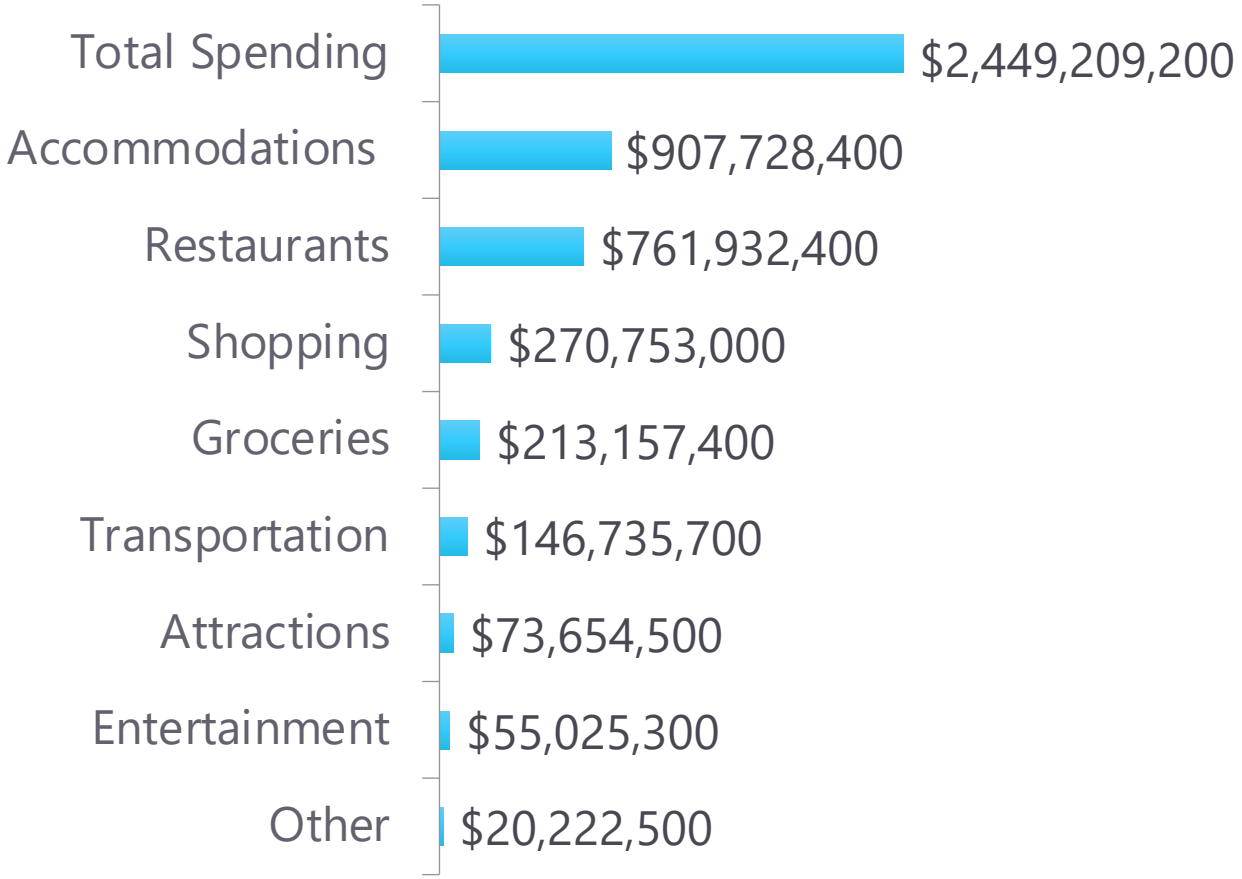
- Visitors contribute **15%** of the total sales taxes collected in Sarasota County
- TDT accounts for **32%** of total local taxes contributed by visitors to Sarasota County
- Visitors contribute **$557[1]** in local taxes per Sarasota County household.



[1]Taxes paid throughout the county by visitors total $118,106,600 (based on IMPLAN results). Spread across 212,204 households in Sarasota County, this translates to a contribution of $557 per household in local taxes.

VISITORS' DIRECT SPENDING FY 2026[1]

Spending on accommodations and restaurants accounts for **68 cents out of every dollar** spent by visitors



[1] All visitors.

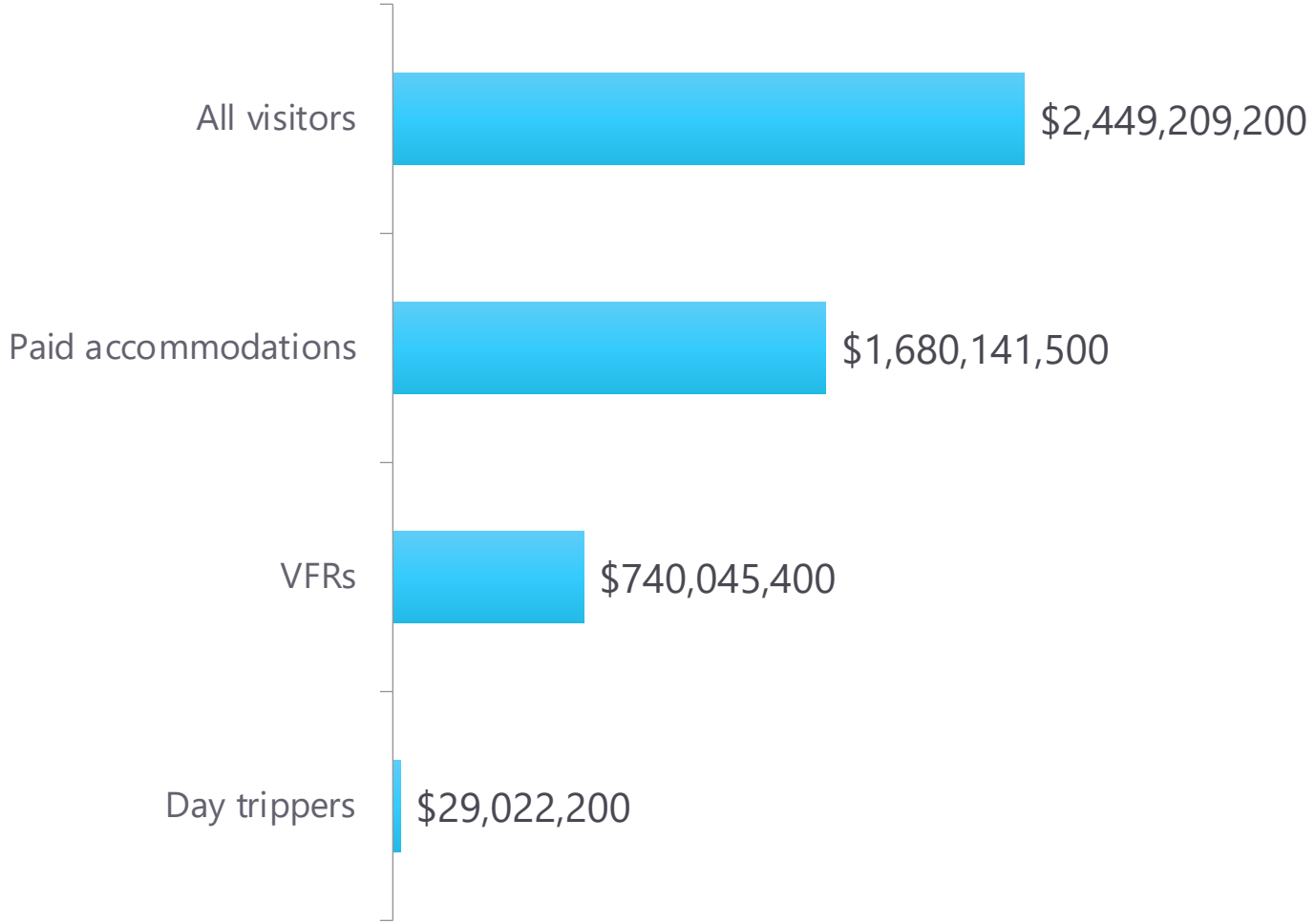
VISITORS' DIRECT SPENDING FY 2024 – FY 2026[1]

Category	FY 2024	FY 2025	FY 2026
Accommodations	$802,231,000	$786,873,400	$907,728,400
Restaurants	$760,843,900	$751,315,800	$761,932,400
Shopping	$351,062,800	$283,876,300	$270,753,000
Groceries	$235,410,000	$229,433,700	$213,157,400
Transportation	$159,421,700	$142,296,800	$146,735,700
Attractions	$113,756,900	$83,826,000	$73,654,500
Entertainment	$101,543,000	$66,497,400	$55,025,300
Other	$24,122,200	$26,082,400	$20,222,500
Total	$2,548,391,500	$2,370,201,800	$2,449,209,200

[1] All visitors.

DIRECT SPENDING BY VISITOR TYPE – FY 2026

Visitors staying in paid accommodations account for about **69%** of all visitor spending in Sarasota County

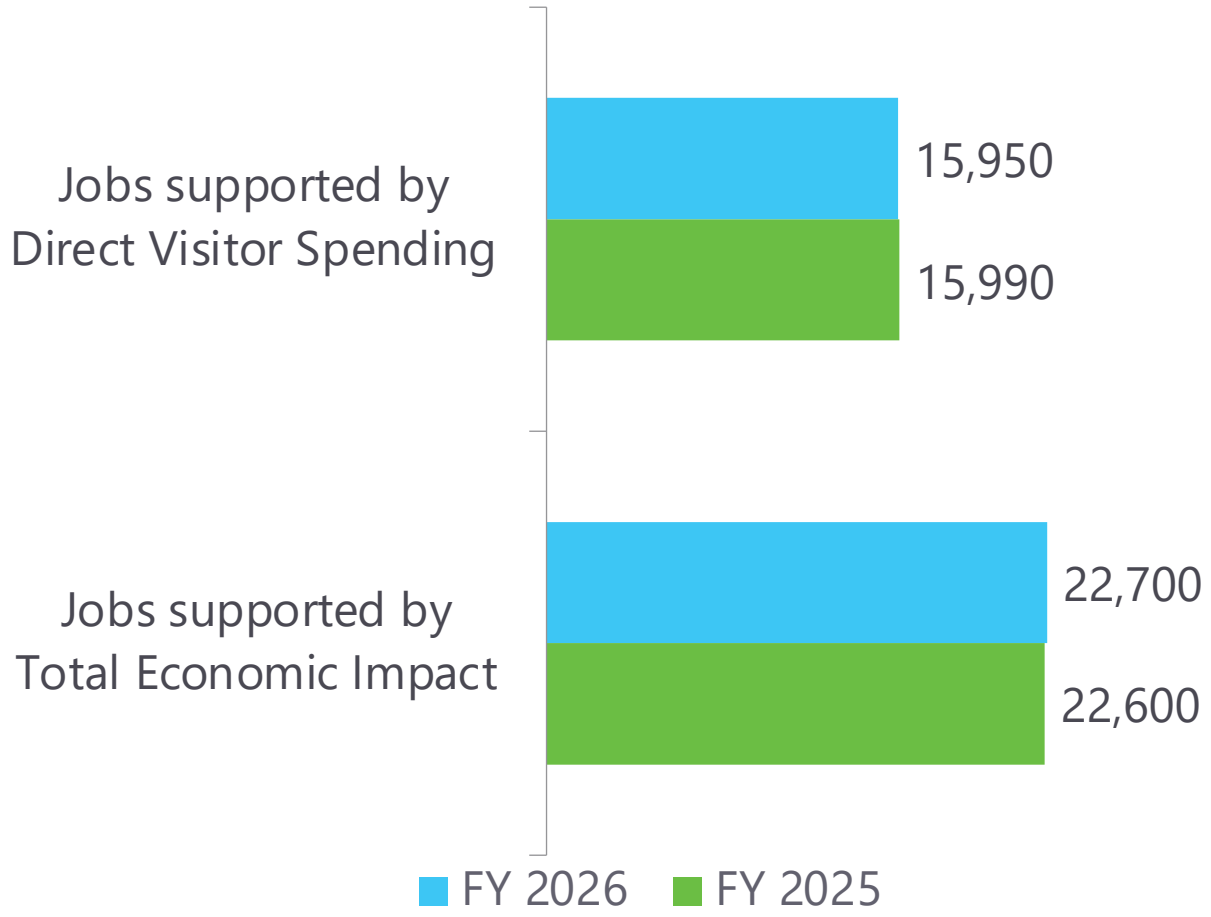


TOURISM'S IMPACT ON EMPLOYMENT[1]

A Sarasota County job is supported by every **122** visitors

Direct spending by visitors supports **8%** of jobs in Sarasota County

Total economic impact of tourism supports **12%** of jobs in Sarasota County



[1]Sources: Bureau of Labor Statistics and IMPLAN direct and total job impact.
The economic impact analysis process has been updated to align more closely with current IMPLAN data models. As a result, previous years' figures have been revised using the updated methodology. This Economic Impact analysis accounts for leakage outside of Sarasota County (i.e., the cost of wholesale and retail trade services that do not continue to circulate within the county's economy).

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FY 2026
VISITOR PROFILE



FY 2026 VISITOR PROFILE SNAPSHOT



- Total visitation was up compared to FY 2025 due to increases in domestic visitors, while the number of international visitors decreased.
- New York City remains the top market for out-of-state visitors, and Orlando remains the top market for in-state visitors staying paid accommodations.
  - The share of visitation from New York City is largely stable across all quarters.
- The share of visitors who used social media (personal and VSC) to plan their trips decreased from FY 2025, while the use of airline, hotel websites/apps, and vacation rental platforms (e.g., Airbnb) increased.
- More visitors recalled seeing advertising, and of those who did, more report being influenced by the messaging they saw. The percentage of those that saw promotions on personal social media increased compared to FY 2025.

VISITORS STAYING IN PAID ACCOMMODATIONS BY REGION[1] FY 2026

Visitor Origin	FY 2025	FY 2026	% of FY 2026	YOY %Δ
Florida	187,070	194,490	14.5%	+4.0%
Southeast (excluding FL)	185,750	190,440	14.2%	+2.5%
Northeast	338,570	356,790	26.6%	+5.4%
Midwest	371,510	378,250	28.2%	+1.8%
West	60,600	73,770	5.5%	+21.7%
Canada	57,970	48,290	3.6%	-16.7%
United Kingdom	28,990	26,830	2.0%	-7.5%
Central Europe	44,790	37,560	2.8%	-16.1%
Other Europe	7,900	5,370	0.4%	-32.0%
Other International	34,250	29,510	2.2%	-13.8%
Total Visitors	1,317,400	1,341,300	100%	+1.8%

	FY 2025	FY 2026	% of FY 2026	YOY %Δ
Domestic Visitors	1,143,500	1,193,740	89.0%	+4.4%
International Visitors	173,900	147,560	11.0%	-15.1%

[1]Visitors staying in paid accommodations.

VISITORS STAYING IN PAID ACCOMMODATIONS BY MARKET[1] FY 2026

Market Origin	% of FY 2026	Visitors
New York City	7.0%	93,230
Chicago	3.8%	50,790
Orlando-Daytona Beach-Melbourne	3.7%	49,630
Tampa-St. Petersburg	3.6%	48,290
Boston	3.6%	48,170
Miami-Fort Lauderdale	3.3%	44,260
Atlanta	3.0%	40,250
Philadelphia	3.0%	39,580
Cleveland-Akron	2.6%	35,000
Detroit	2.6%	34,770
Cincinnati	2.0%	27,440
Indianapolis	2.0%	27,040
Washington, D.C.	2.0%	26,690
Dallas-Fort Worth	1.7%	22,940
Minneapolis-St. Paul	1.7%	22,870

Market Origin	% of FY 2026	Visitors
Columbus, OH	1.7%	22,230
Pittsburgh	1.6%	22,000
Baltimore	1.4%	18,860
Hartford-New Haven	1.2%	15,830
Harrisburg-Lancaster-Lebanon-York	1.2%	15,620
West Palm Beach-Fort Pierce	1.1%	14,750
Fort Myers-Naples	1.1%	14,750
St. Louis	1.1%	14,230
Grand Rapids-Kalamazoo-Battle Creek	1.0%	13,620
Albany-Schenectady-Troy	1.0%	13,540
Denver	1.0%	13,130
Toronto	1.0%	13,110
Jacksonville	1.0%	12,970
Charlotte	0.9%	12,590
Dayton	0.9%	12,540

[1]Source: DSG visitor tracking study and Zartico.

INFORMATION SOURCES FY 2026

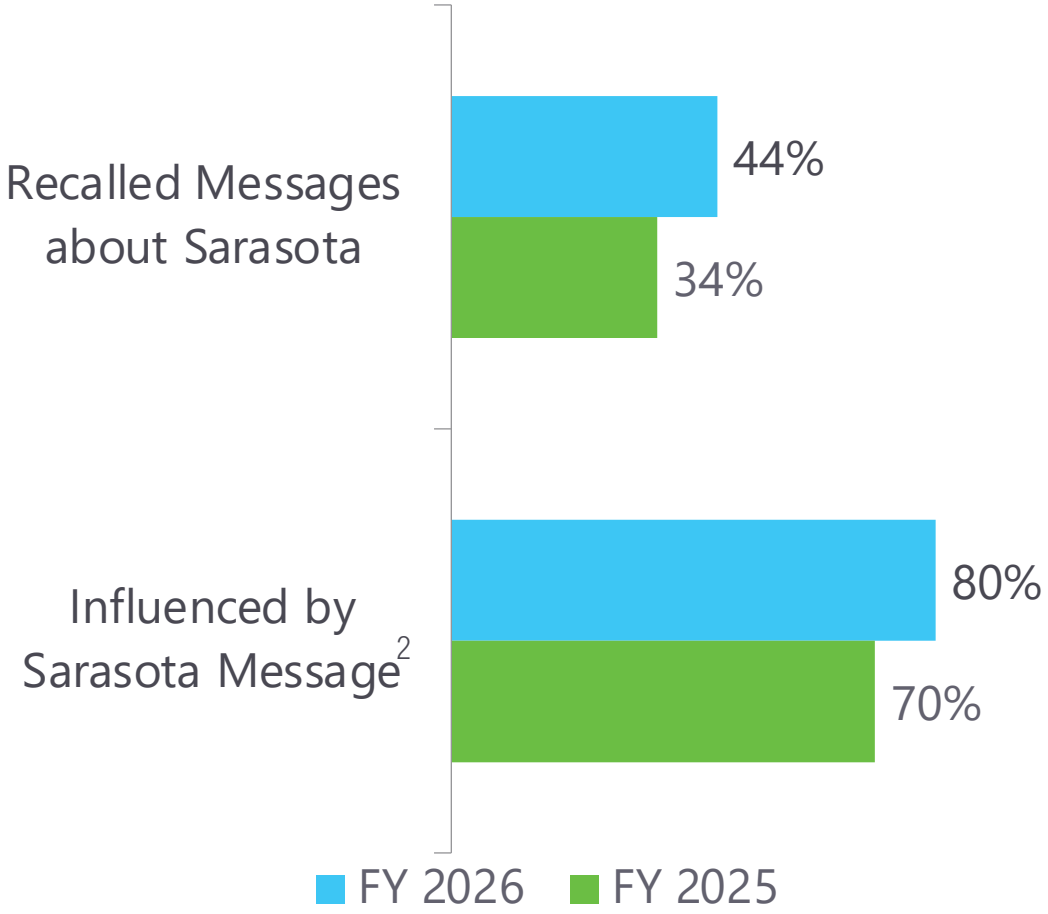
Online Planning Sources Consulted	FY 2025	FY 2026
Mapping websites (Google Maps, etc.)[1]	NA	62%
Personal social media	62%	52%
Airline websites/apps	41%	50%
Restaurant websites/apps[1]	NA	48%
Review website/app, (TripAdvisor, etc.)	41%	33%
Online travel reviews, blogs, stories	43%	31%
Rental car websites/apps[1]	NA	31%
VisitSarasota.com	23%	20%
Hotel websites/apps	14%	20%
Visit Sarasota social media	24%	17%
Airbnb, Vrbo, etc.	13%	17%
ChatGPT or other AI program[1]	NA	11%
Online Travel Agency (Expedia, etc.)	7%	8%
Sarasota rental management companies[1]	NA	5%
Accessibility/special needs sites[1]	NA	<1%
Podcast[1]	NA	<1%
Other	8%	8%
None[1]	NA	9%

Other Sources for Planning Trips	FY 2025	FY 2026
Friends, family, etc.	37%	40%
Visitor guide/ brochure	21%	19%
Newspaper	20%	18%
Magazine	18%	17%
Television	15%	15%
Radio	9%	10%
Event information	2%	6%
Business/meeting information	2%	5%
Travel agent	<1%	1%
AAA	1%	<1%
Other	4%	6%
None	5%	14%

[1] New or updated response category with no direct analog in FY 2025.
FY 2026 figures reflect quarters in which data were available.

ADVERTISING RECALL FY 2026

Advertising Sources	FY 2025	FY 2026
Personal social media	24%	32%
Online article[1]	NA	14%
Newspaper	15%	10%
Visit Sarasota social media	13%	8%
Billboard or outdoor advertisement	4%	8%
VisitSarasota.com	11%	7%
Ad on a website[1]	NA	7%
Television	7%	6%
Travel/Visitor Guide or Brochure[1]	10%	5%
Traveler reviews/blogs	9%	4%
Magazine article[1]	4%	4%
Magazine ad[1]	4%	3%
Radio	1%	2%
Weather app[1]	NA	1%
AAA	2%	1%
Video streaming services[1]	NA	1%
Music streaming services[1]	NA	<1%
Podcast[2]	NA	<1%
Rental/booking websites[1]	NA	<1%
Other	15%	9%

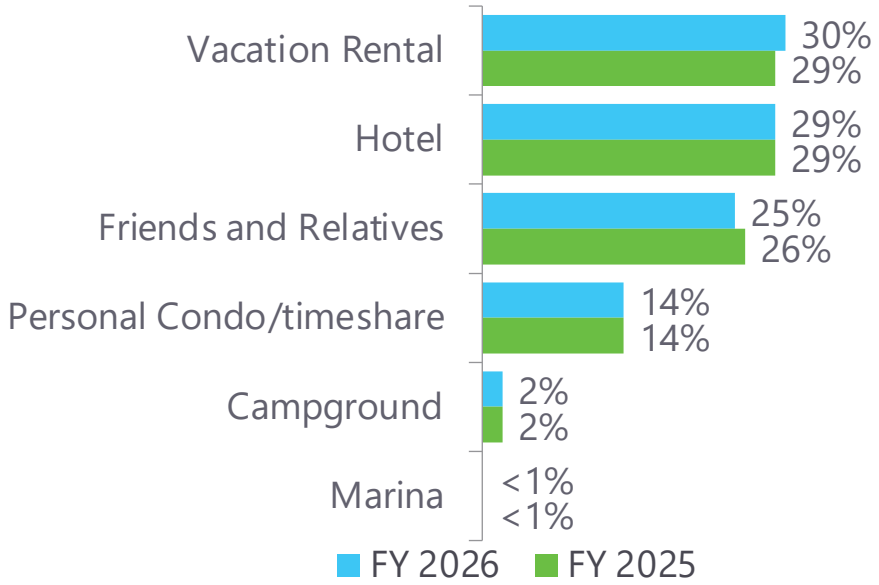


[1] New or updated response category. FY 2025 figures either unavailable or estimated based on most recent data. FY 2026 figures reflect quarters in which data were available.
[2] Base: Visitors who recalled messages about Sarasota. FY2026 figure reflects those who said "Somewhat Influential", "Very Influential", or "Extremely influential."

SARASOTA VISITOR PROFILE FY 2026

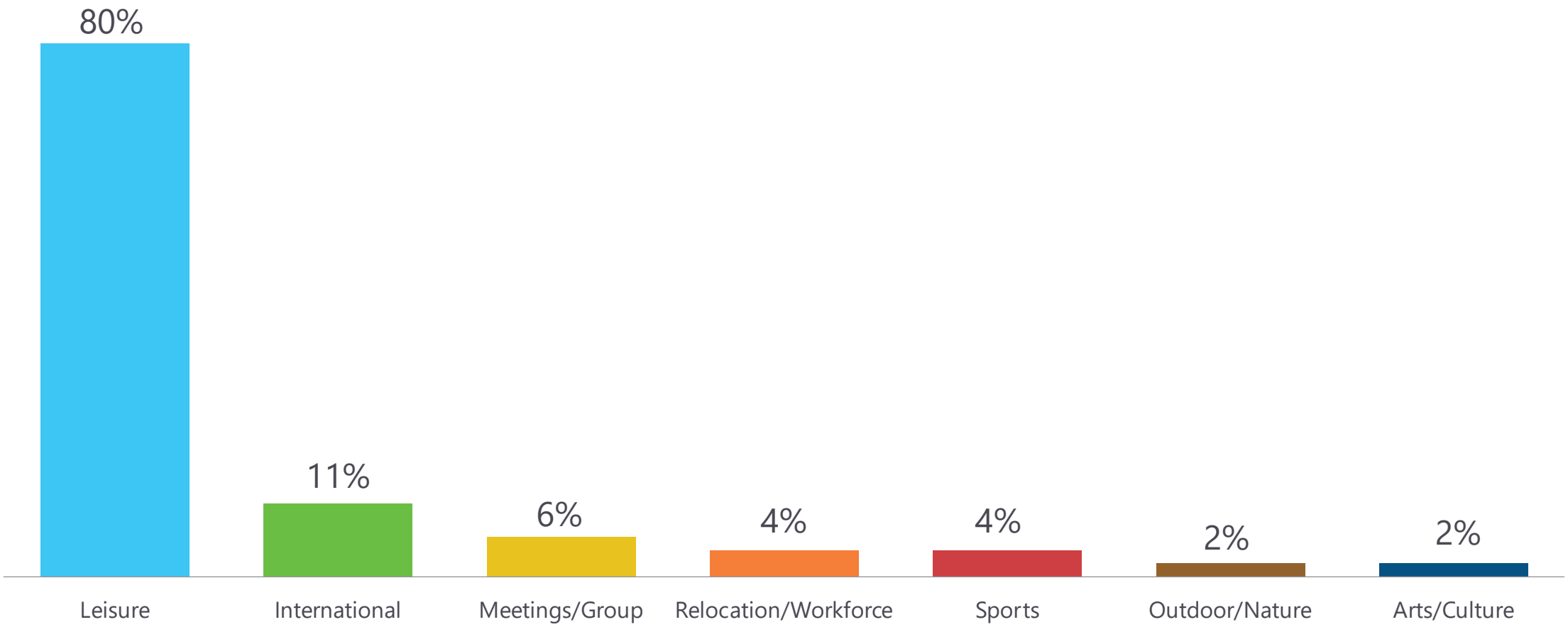
Purpose of Trip	FY 2025	FY 2026
Vacation/leisure trip[1]	85%	80%
Visit friends/relatives	33%	30%
Special occasion	10%	6%
Business, conference, meeting, etc.	5%	6%
Sporting event	4%	4%
Looking at real estate	5%	4%
Outdoor recreation and nature[1]	4%	2%
Arts & Culture[1]	3%	2%
Event or festival[1]	NA	1%
Medical Reasons[1]	NA	1%
Other	10%	3%

Lodging	FY 2025	FY 2026
Vacation Rental	29%	30%
Hotel	29%	29%
Friends and Relatives	26%	25%
Personal Condo/timeshare	14%	14%
Campground	2%	2%
Marina	<1%	<1%



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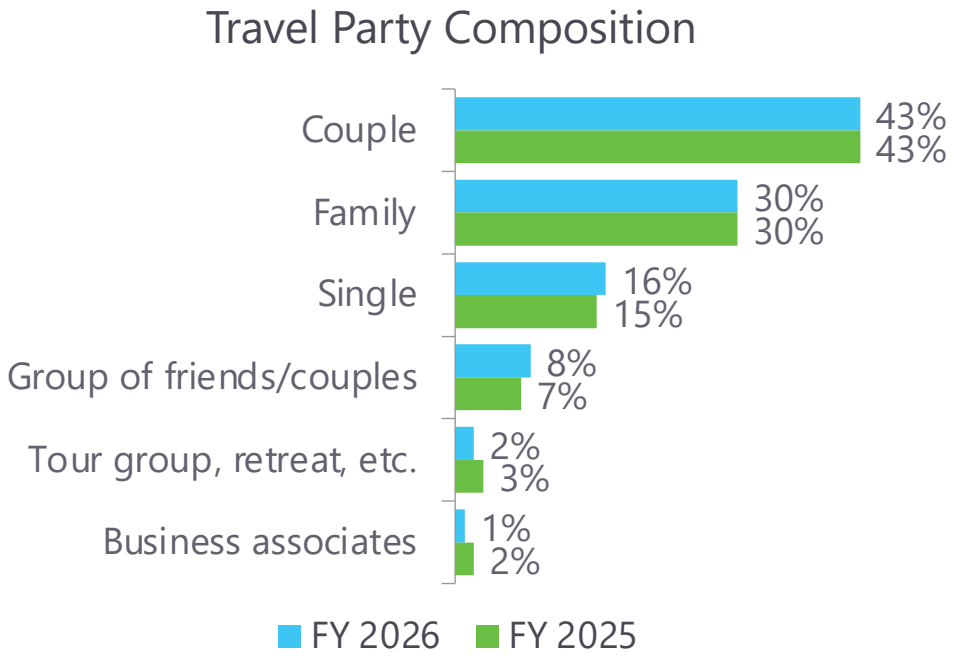
VISIT SARASOTA COUNTY AUDIENCE BREAKDOWN[1] FY 2026

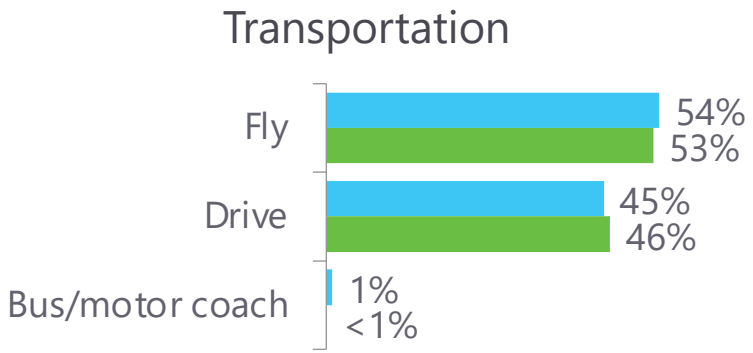


[1]Audience estimate is based on main reason for visiting intercept survey question.
Visitors may belong to multiple audiences.

SARASOTA VISITOR PROFILE FY 2026

	FY 2025	FY 2026
Average Days in Sarasota County[1]	7.5	7.9
Average Party Size (# of people)[2]	2.9	2.9
Travel Party Composition		
Couple	43%	43%
Family	30%	30%
Single	15%	16%
Group of friends/couples	7%	8%
Tour group, retreat, etc.	3%	2%
Business associates	2%	1%
Have Children in Travel Party	23%	22%
Transportation Mode		
Fly	53%	54%
Drive	46%	45%
Bus/motor coach[3]	<1%	1%
Airport Deplaned (Base: Flew)		
Sarasota/Bradenton International (SRQ)	52%	51%
Tampa International (TPA)	25%	24%
Orlando International (MCO)	6%	7%
Punta Gorda Airport (PGD)	4%	5%
Southwest Florida International (RSW)	4%	5%
Miami International (MIA)	5%	4%
St. Pete-Clearwater International (PIE)	2%	2%
Ft. Lauderdale International (FLL)	1%	1%
Other	1%	1%





[1] Visitors who stayed in paid accommodations for 30 days or fewer.
[2] Visitors staying in paid accommodations.
[3] New or updated response category. FY 2025 figures either unavailable or estimated based on most recent data. FY 2026 figures reflect quarters in which data were available.

ATTRACTIONS FY 2026

Attractions Visited	FY 2025	FY 2026
St. Armands Circle	56%	57%
Kissing Sailor Statue	42%	37%
Mall at University Town Center	27%	27%
Ringling Museum of Art	23%	22%
Mote Marine Aquarium	11%	15%
Marie Selby Botanical Gardens	15%	14%
Venice Fishing Pier	11%	10%
Myakka State Park	10%	10%
Legacy Trail	8%	8%
Prime Outlet Mall	7%	6%
Sarasota Art Museum	5%	5%
Sarasota Jungle Gardens	5%	5%
Van Wezel Performing Arts Hall	5%	5%
The Bay[1]	NA	5%
Oscar Sherer State Park	3%	4%
Historic Spanish Point	5%	4%
Circus Sarasota	4%	4%
Ed Smith Stadium (Orioles)	4%	4%
Red Barn Flea Market	4%	3%
Big Cat Habitat	3%	3%

Attractions Visited	FY 2025	FY 2026
Ringling College of Art	3%	3%
Florida Studio Theatre	3%	3%
Asolo Repertory Theatre	3%	3%
Children's Fountain	2%	3%
Sarasota Opera	2%	2%
The Celery Fields	3%	2%
Venice Theatre	2%	2%
Sarasota Orchestra	1%	2%
CoolToday Park (Braves)	2%	2%
Sarasota Ballet of Florida	1%	1%
Sarasota Film Festival	1%	1%
Sarasota Music Festival	1%	1%
Sarasota Audubon Nature Center	<1%	1%
Westcoast Black Theatre Troupe[1]	NA	1%
Venice Institute for Performing Arts[1]	NA	1%
South Florida Museum	<1%	<1%
The Players Theatre	<1%	<1%
Lemon Bay Playhouse[1]	NA	<1%
Urbanite Theatre[1]	NA	<1%
Other	7%	11%
None	11%	9%

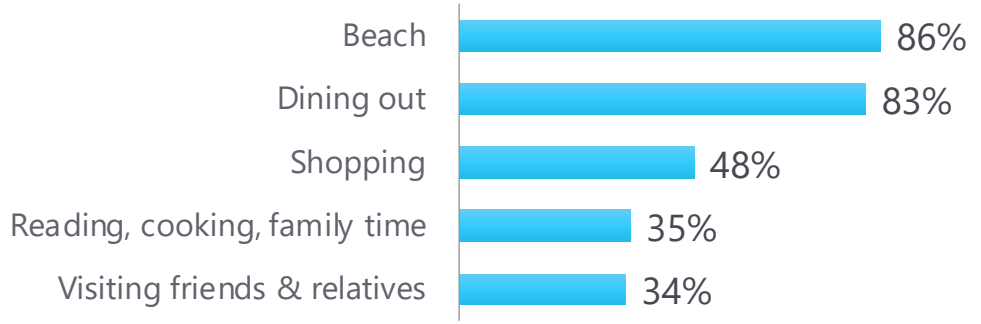
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SARASOTA VISITOR ACTIVITIES FY 2026

Activities Enjoyed in Area	FY 2025	FY 2026
Beach	86%	86%
Dining out	80%	83%
Shopping	44%	48%
Reading, cooking, family time	33%	35%
Visiting friends & relatives	36%	34%
Cultural/historical attractions[1]	22%	19%
Outdoor activities[1]	15%	18%
Special event	21%	18%
Nature, environment, etc.	16%	15%
Nightlife	14%	11%
Local theatres[1]	9%	8%
Golf/tennis/pickleball[1]	7%	8%
Sporting events	7%	7%
Business conference or meeting	5%	6%
Looking at real estate	4%	4%
Spring Training	4%	3%
Spas	1%	2%
Other	17%	16%

[1] New or updated response category. FY 2025 figures either unavailable or estimated based on most recent data. FY 2026 figures reflect quarters in which data were available.

Top 5 Activities Enjoyed



Areas in Sarasota County	Area Stayed	Areas Visited
Downtown Sarasota[1]	17%	61%
Sarasota (Not Downtown)[1]	35%	60%
Siesta Key	18%	54%
St. Armands Circle	1%	51%
Lido Key	7%	49%
Longboat Key	6%	25%
Venice[1]	5%	24%
Lakewood Ranch	3%	14%
Nokomis[1]	2%	12%
Casey Key	2%	10%
Osprey[1]	1%	6%
Englewood	1%	5%
North Port	1%	5%
Manasota Key	<1%	3%
Other	1%	4%

SARASOTA VISITOR PROFILE FY 2026

	FY 2025	FY 2026
Visiting frequency		
1st visit to Sarasota County	24%	25%
11+ visits to Sarasota County	35%	33%
Trip Experience		
Completely Satisfied with Visit	90%[1]	89%
Likely to Return[2]	97%	98%[2]
Likely to Recommend Sarasota area[2]	98%	99%[2]
Demographics		
Average age of head of household[3]	55	57
Median household income	$119,400	$125,000
Ethnicity		
Caucasian	82%	83%
Hispanic	10%	9%
African American	4%	4%
Asian	3%	3%
Other	1%	1%

[1] Response option read "Very Satisfied" in FY 2025.
[2] FY2026 figure reflects those who said "Likely" or "Very Likely."
[3] New response format. FY 2026 figures reflect quarters in which data were available.

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Economic Impact of Tourism

FISCAL YEAR 2026

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