



RESIDENTIAL INVENTORY FOR THE CITY OF SANIBEL

An Inventory by Structure Type & Type of Use

2025



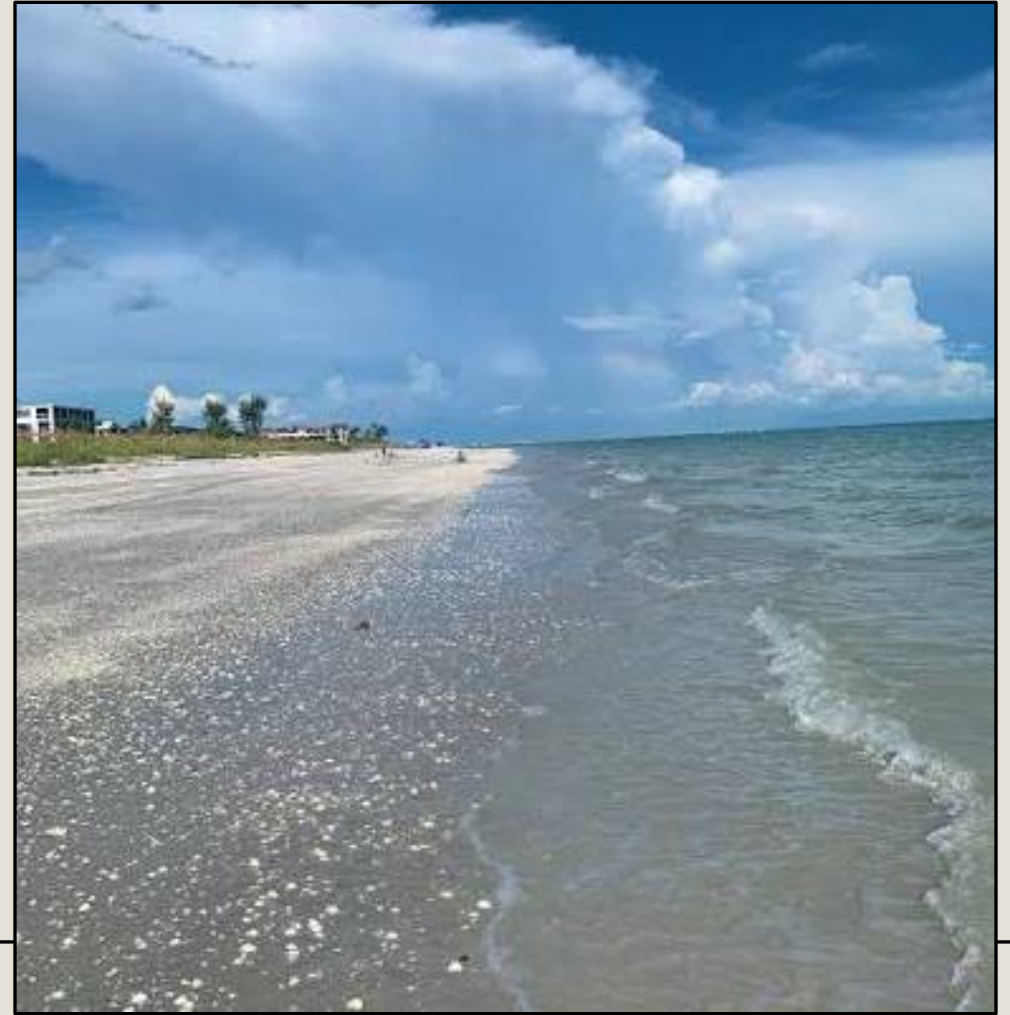
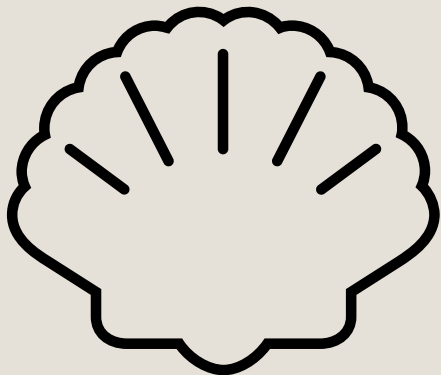
INTRODUCTION

This report updates the inventory of Sanibel's housing stock contained in the *2010 Residential Land Use Analysis Report*. The amount and location of existing and projected residential development in the City of Sanibel have been compiled from City records and Lee County Property Appraiser data.

This inventory of the housing stock includes units used for long-term residential occupancy as well as units used for short-term occupancy, including hotels, motels, and inns.

DISCLAIMER

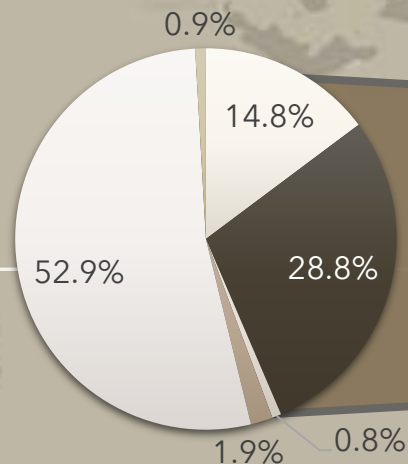
This information is general in nature and is best used for its aggregate value. Although the information is detailed in its presentation, it is not based on a parcel-by-parcel analysis and should not be considered definitive. The Planning Department is continuing to review this data for errors and omissions.



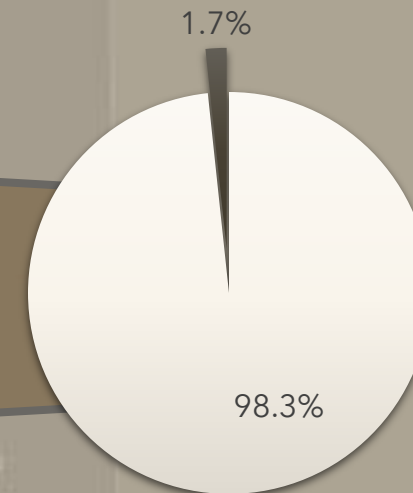
REGIONAL CONTEXT

- In the regional housing market, the City of Sanibel represents a small yet distinct component.
- Based on the 2024 American Community Survey 1-Year Estimates, the US Census Bureau estimates that in 2025 the City of Sanibel's 7,822 dwelling units represent approximately 1.7% of the dwelling units in Lee County, and less than one percent of dwelling units in the southwest Florida region

Housing Units in Southwest Florida



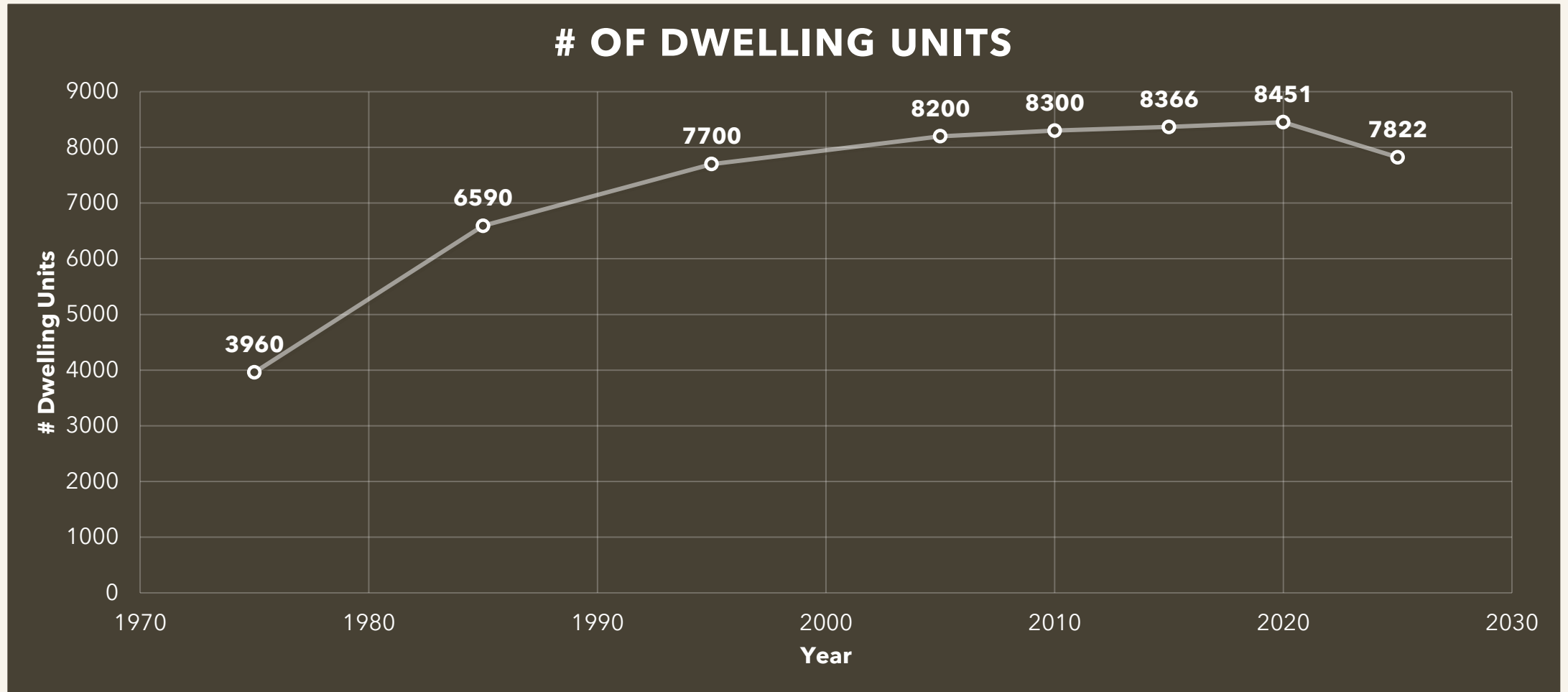
Housing Units in Lee County



■ Charlottee ■ Collier ■ Glades ■ Hendry ■ Lee ■ Sanibel

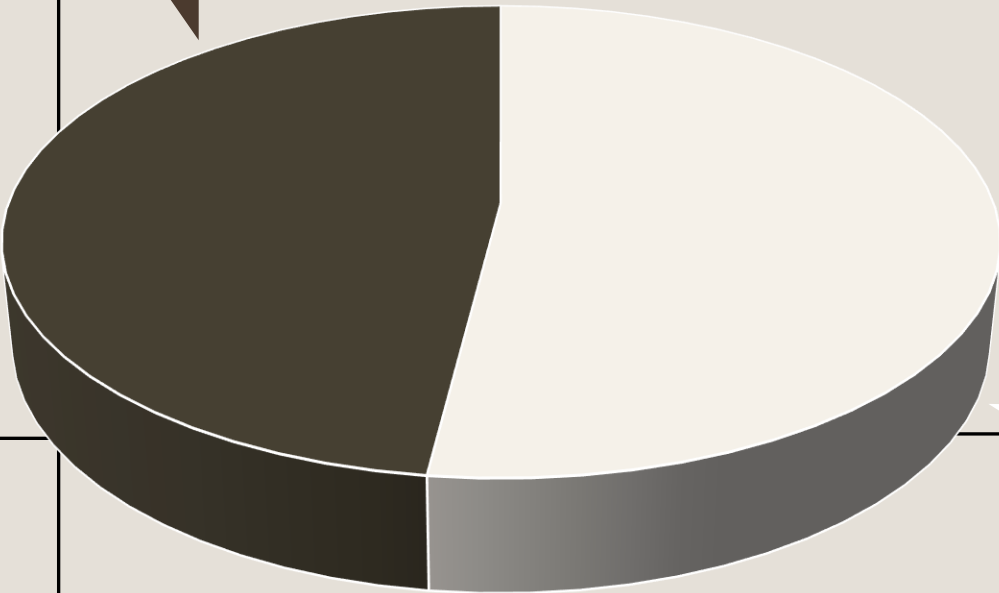
■ Lee ■ Sanibel

TOTAL HOUSING UNITS ON SANIBEL



COMPONENTS OF THE RESIDENTIAL LAND USE INVENTORY

**Multi-Family
48%**



**SFR & Duplex
52%**



COMPONENTS OF SANIBEL'S HOUSING STOCK

Housing Type	<u>1975</u>		<u>2010</u>		<u>2025</u>		% Change 1975-2025
	Units	% of Total	Units	% of Total	Units	% of Total	
Single Family Units (Includes 230 Duplexes in 2010)	980	25%	3,992	48%	4008	51%	309.0%
Multi-Family Units	1,930	49%	3,113	38%	3110	40%	61.1%
Units in Hotels, Motels and Inns	924	23%	703	8%	352	5%	-61.9%
Timeshare Units	0	0%	384	5%	268	3%	NA
Manufactured Units (Mobile Homes)	112	3%	80	1%	84	1%	-25.0%
TOTALS	3,946		8,272		7822		98.2%

IN THE PAST 15 YEARS 2010-2025

NEW SFR &
DUPLEX UNITS

326



NEW MULTI-
FAMILY UNITS

25



DEMOLISHED SFR
& DUPLEX UNITS

337



DEMOLISHED MULTI-
FAMILY UNITS

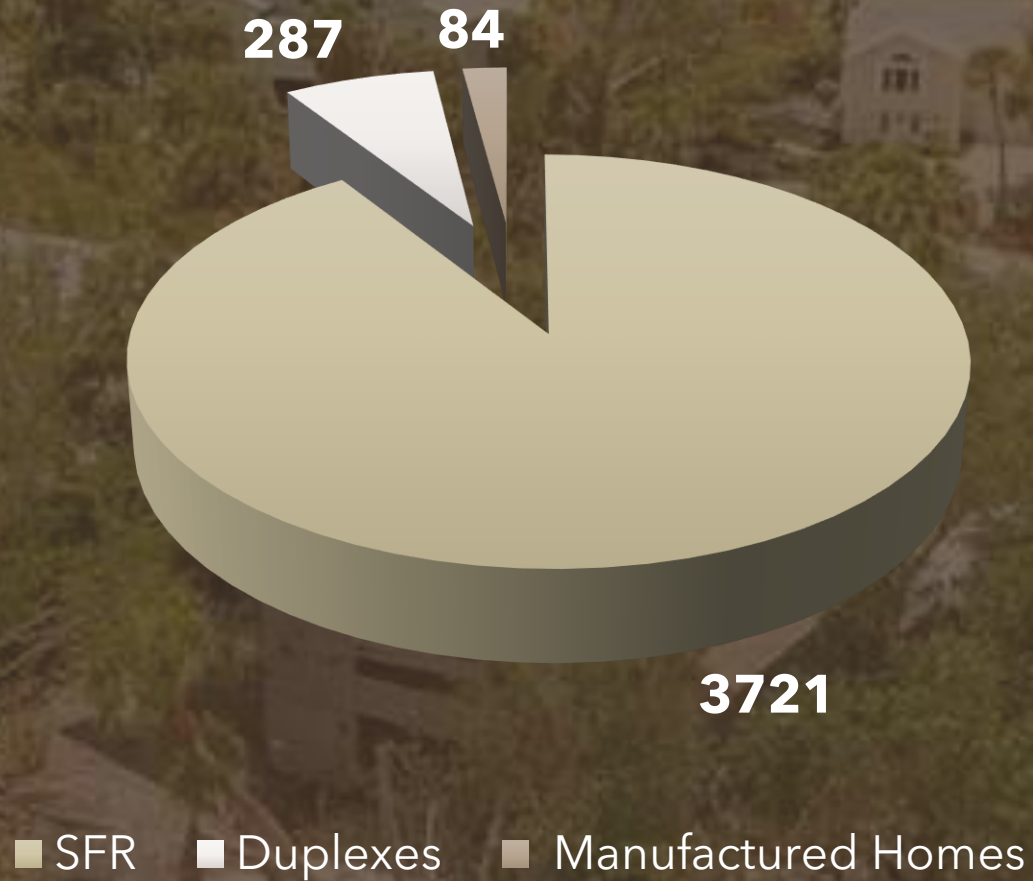
426



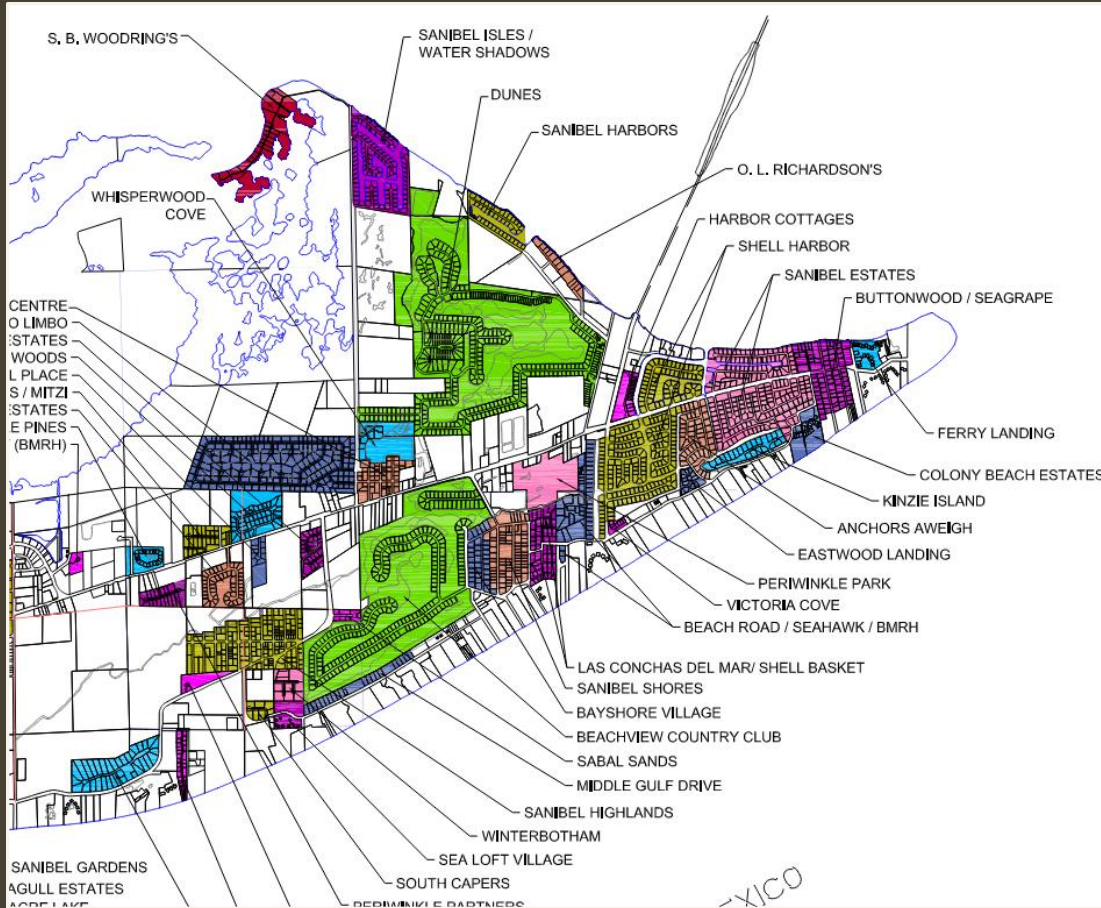
NEW DWELLING UNITS BY TYPE, 2011-2025

Year	NEW SFR/Duplex	<i>DEMO SFR/Duplex</i>	NEW Multi-Family	<i>DEMO Multi-Family</i>	Over/ Under
2011	16	5	0	0	11
2012	11	2	0	0	9
2013	21	6	0	0	15
2014	22	3	0	0	19
2015	18	5	0	0	13
2016	27	7	0	0	20
2017	35	7	0	0	28
2018	23	9	0	12	2
2019	23	8	0	0	15
2020	26	6	0	0	20
2021	14	2	0	0	12
2022	4	5	0	14	-15
2023	8	126	0	192	-310
2024	22	78	0	65	-121
2025	56	68	25	143	-130
Totals	326	337	25	426	-412

SINGLE FAMILY AND DUPLEX UNITS

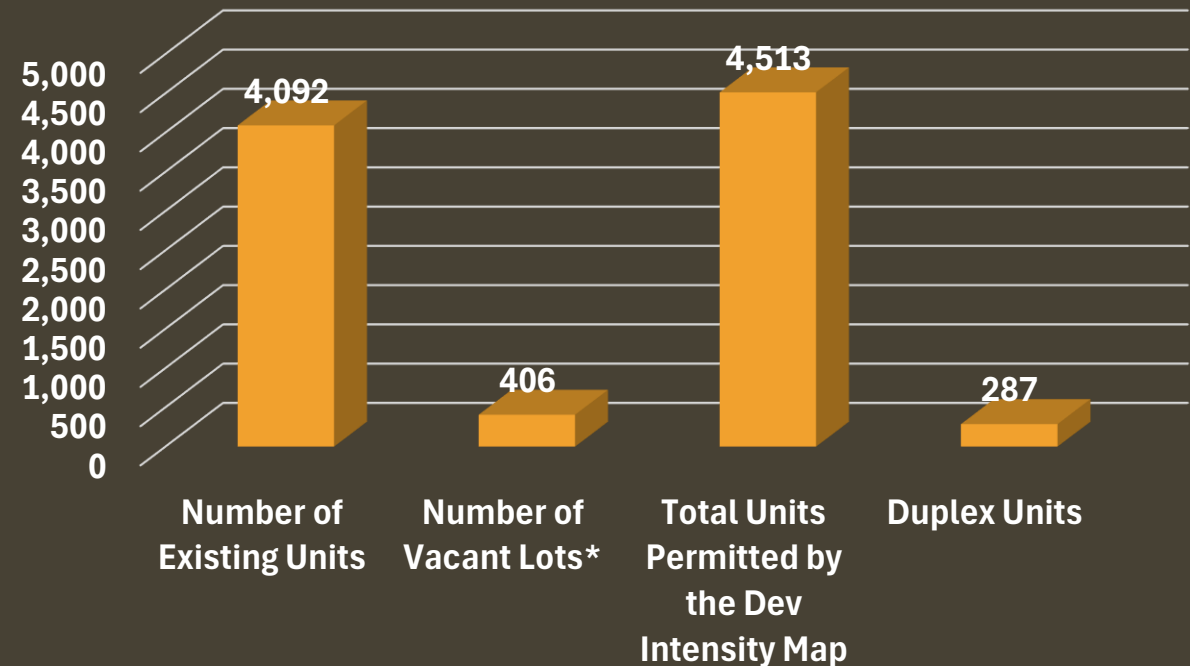


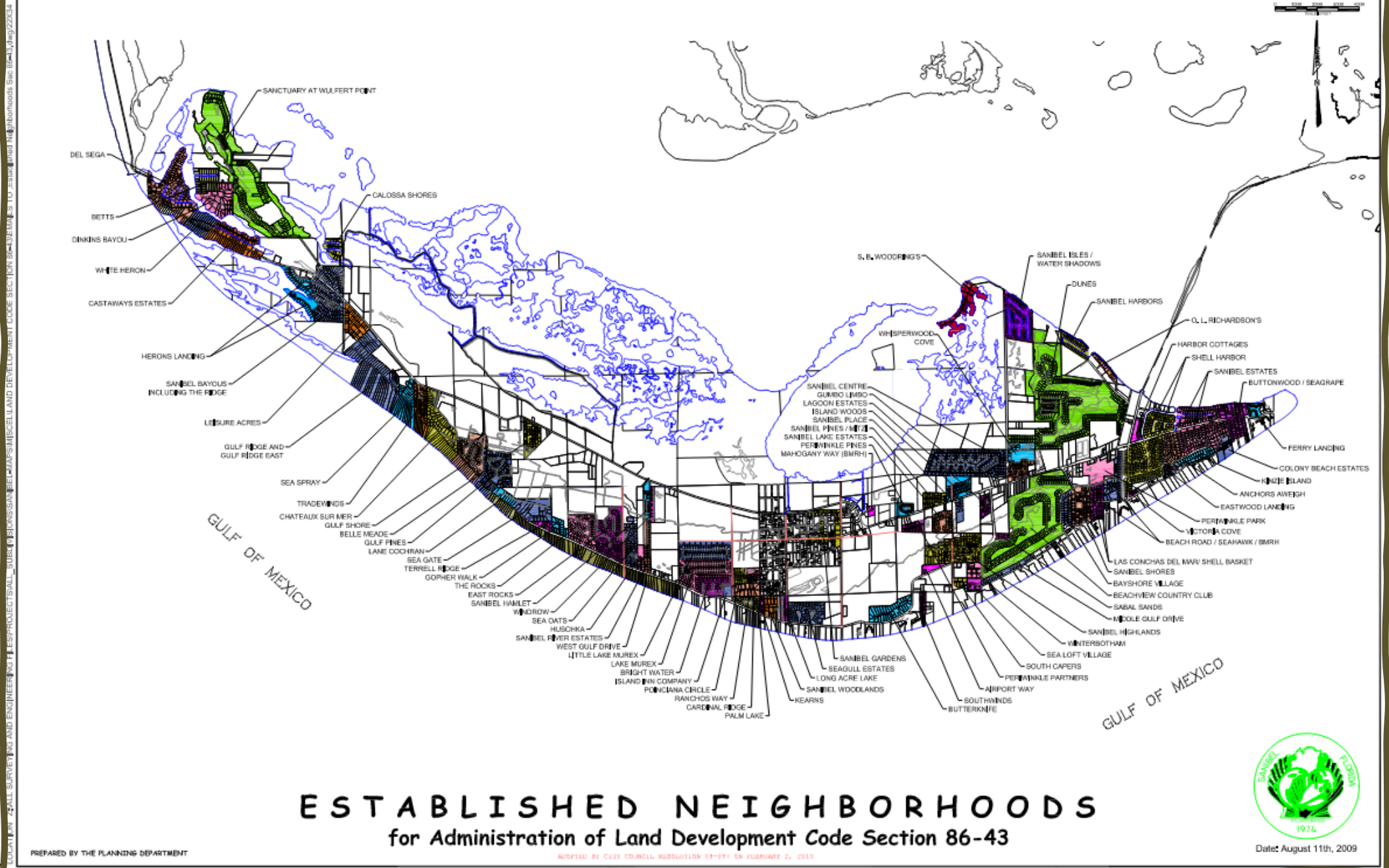
SINGLE-FAMILY DEVELOPMENTS



- Includes Single-Family and Duplex Lot Subdivisions,
- Including Unified Residential (Cluster) Developments

**this information can be found in Table 5 of the Residential Inventory*





MULTI-FAMILY UNITS



3,730 DWELLING UNITS
CLASSIFIED AS MULTI-FAMILY

NON-RESORT
CONDOMINIUMS
AND
APARTMENTS

Table ⑥

RESORT
CONDOMINIUMS
AND
APARTMENTS

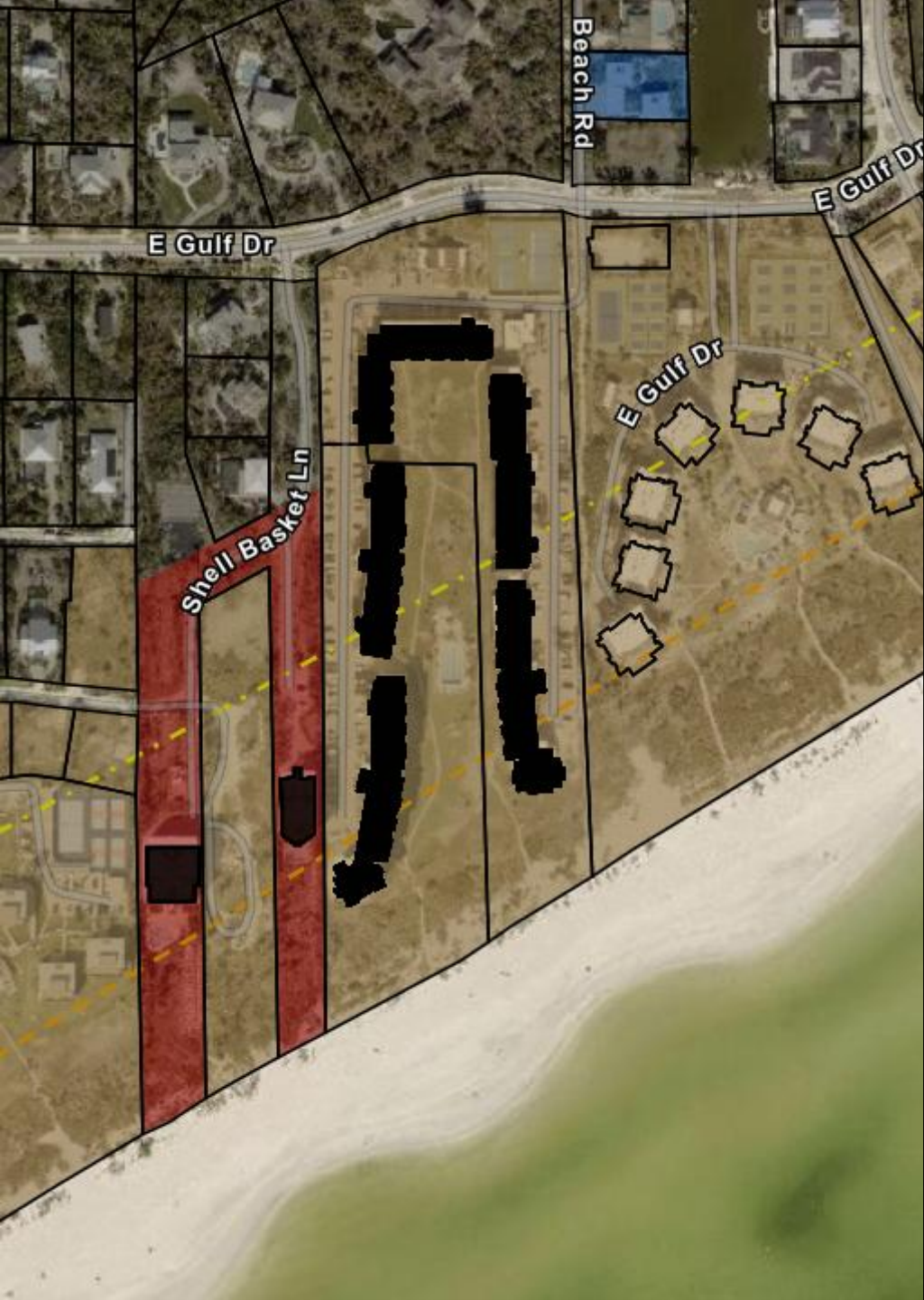
Table ⑦

HOTELS, MOTELS
AND COTTAGES

Table ⑧

TIMESHARE
CONDOMINIUMS

Table ⑨



RESORT HOUSING

IN 2025, 3,248 MULTI-FAMILY UNITS ARE AVAILABLE, BY PERMITTED USE, AS RESORT HOUSING

THIS IS NEARLY 87% OF ALL MULTI-FAMILY UNITS, OR 42% OF ALL DWELLING UNITS

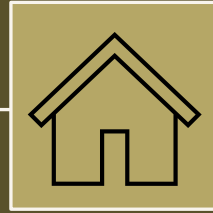
SHORT-TERM RENTALS ARE UNITS MADE AVAILABLE FOR LESS THAN 4 CONSECUTIVE WEEKS

BELOW MARKET RATE HOUSING



91

Dwelling units
in the City's
Below Market
Rate Housing
program



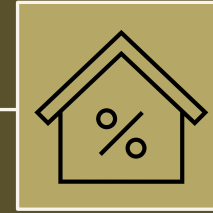
52

In the single
family and
duplex
category



39

In the multi-
family category



< 1%

Of BMRH units
in the total
residential
inventory



2%

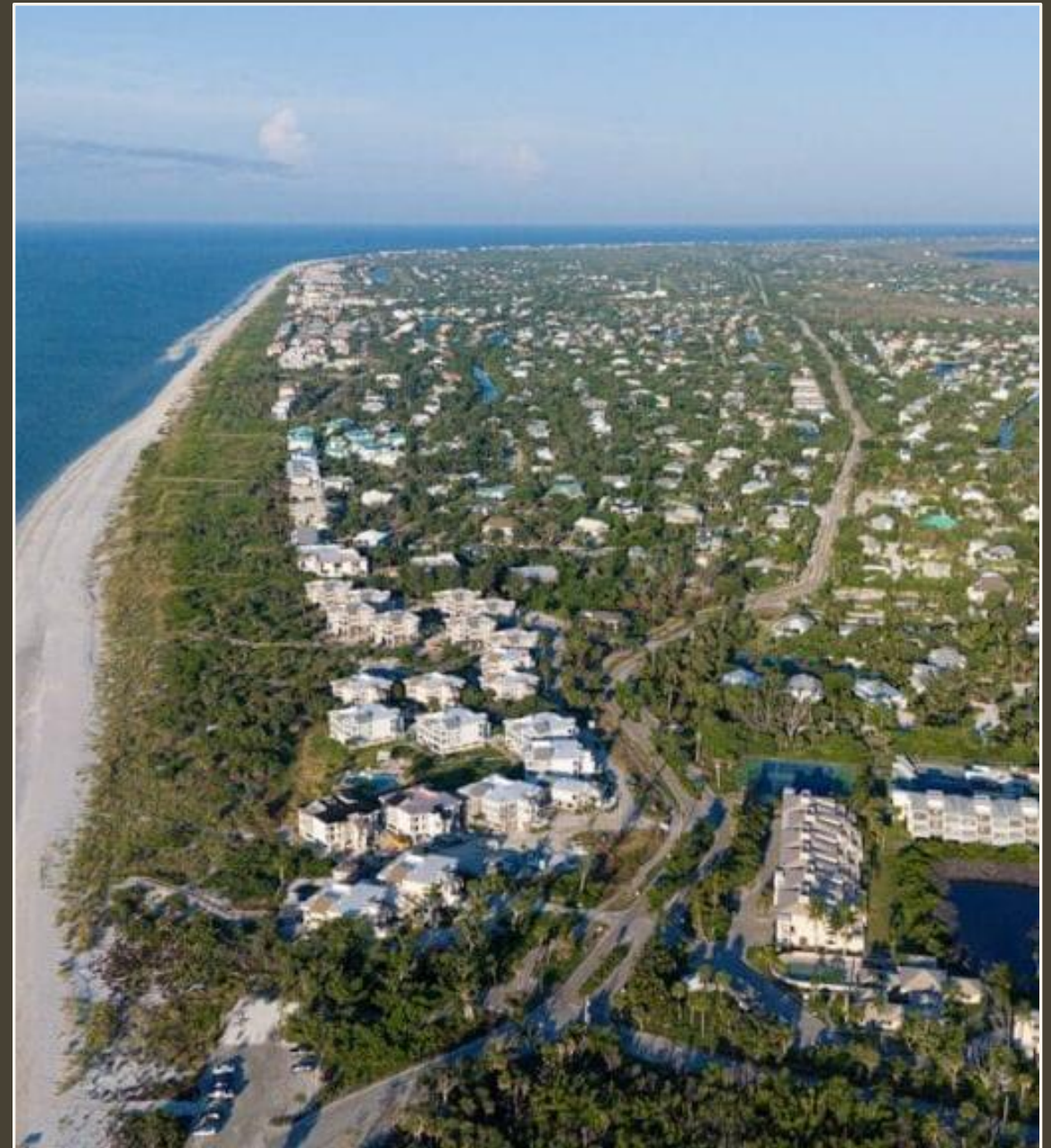
Of the non-
resort use
dwelling units

AS OF 2025

GROWTH RATE

OVER 50% OF THE EXISTING RESIDENTIAL DEVELOPMENT IN THE CITY OF SANIBEL HAS BEEN CONSTRUCTED SINCE 1975.

APPROXIMATELY 24% OF THE SINGLE FAMILY AND DUPLEX DWELLING UNITS IN THE EXISTING HOUSING STOCK WERE BUILT SINCE 1975.



BUILD-OUT

1,178 DWELLING
UNITS TOTAL

- Projected to be added to the residential inventory in the City of Sanibel.

396 UNITS

- Expected to be located within existing single-family developments
- The remaining 782 units are projected to be located on vacant/undeveloped or not fully developed lands.

EXISTING 7,822
UNITS

- Represent 87% of the approx. 9,000 dwelling units projected to make up the residential inventory at build-out.

Housing Type	2025		Build Out	
	Units	%	Units	%
Single Family Units (Includes Duplexes)	4,008	51%	4,700	52%
Multi-Family Units	3,110	40%	3,136	35%
Units in Hotels, Motels and Inns	352	5%	700	8%
Timeshare Units	268	3%	384	4%
Manufactured Units (Mobile Homes)	84	1%	80	1%
TOTAL	7,822		9,000	

- Build-out projections, by structure type, show a continuing trend of single-family residential development increasing its proportionate share of the residential inventory.
- The build-out projection of approx. 9,000 dwelling units may never be reached; there are numerous public and private decisions that may decrease this projection.
- To date, the build-out projection of approx. 9,000 dwelling units remains a valid assumption.

Estimates were established from a structure-by-structure survey in 1975, 2010 Residential Land Use Analysis and updated from building permit reports.

Prepared by the Planning Department

SOURCES