

Lee County Annual 1996 Visitor Profile

Executive Summary

1. From every perspective, it is clear that tourism is Lee's number one industry. In 1996, tourist expenditures impacted the County's economy at a rate exceeding \$1.2 billion, with 1,715,090 visitors enjoying a stay at the Lee Island Coast **[LIC]**. Both the visitation and expenditure levels represent all time highs for the industry. These records are all the more impressive when seen in the context of changing market conditions and global competition.
2. Although conservative estimates place the growth of the **LIC's** lodging industry in the 10% range for the '95/'96 time period, the destination achieved a net 1.5% increase in the level of occupancy in 1996.
3. Over the course of 1996, **LIC** recovered better than 96% of its European market lost in the wake of the economy and safety generated contractions of 1994. Even more importantly, the destination's market share in key Northeastern and Midwestern feeder markets increased significantly (Midwest: +20,482; Northeast: +18,662).
4. Over the past ten years, the Nation's tourism industry has experienced far reaching changes. Most of these changes are structural in nature, with effects that will manifest themselves over the next twenty years. Most of the forces that are transforming tourism today are of a socio-economic, demographic, and competitive nature.
5. Following the post war period, the U.S. experienced a rapid population expansion. When these baby boomers formed families, they in turn impacted education, then housing and job markets. Today, they are increasingly empty nesters, approaching early retirement. Important for tourism, this market segment is financially well-off, "youth-oriented," mobile, and focused on quality products and services. At the same time, these consumers are busy, economically active people, making traditional vacation planning more challenging.

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6. In '96, fully 65.6% of visitors traveled to Lee as couples ('93: 59.9%). Couples tend to have a greater interest in get-away vacations (3-5 nights) and are more likely to use air transportation. Typically, both adult members of a household are in the labor force, impacting the design of promotional and advertising strategies in the industry. Similar trends prevail in our Canadian and European core markets.
7. The family market has, however, not lost its significance to Lee Island tourism. Competition for this important market is intensifying, with the market itself becoming increasingly segmented. For this strata, economic and social forces have made for significant changes as well. To make ends meet, female labor force participation is at an historical high. Divergent school vacation schedules make family vacation planning complex and challenging.
8. As a consequence, there has been a dramatic decline in the length of time visitors can spend in the County. Since 1984, the length of stay has dropped by five nights, with a plateau reached in 1996. Given the demographic trends of the Nation, this decline is likely, however, to continue, albeit at a decreasing rate. For the industry, this represents a continuing and growing marketing challenge.
9. As in past years, the Lee Island Coast's clientele is upscale, and increasingly professional and technical in occupation. For most, the pressures of daily life leave little time to research multiple, alternative get-away/vacation options. In the industry, this is known as the "Time Poverty Paradox." Today's travelers increasingly seek single-source information/offers. They seek vacation destinations that provide packages, or promotional statements and materials, that put together a number of vacation elements and guarantee the quality, value for the money, and the timely delivery of the product as promised. This explains the recent industry focus on packaging.
10. The concurrent shrinkage of the "traditional" season is also a function of the above factors, accelerated by the increasing availability of affordable air transport. Lee County's International Airport has become a critical catalyst to the future growth of the industry.

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11. As in '95, a majority of '96 visitors (66.8% and 67.8%, respectively) used air transportation to reach our area. An impressive 68.0% of the 1996 plane traffic to Lee was directed into Southwest Florida International (1995: 67.2%).
12. Not surprisingly, car rental activity is a direct correlate of the "lift" statistics detailed above for the year 1996.
13. As expected, the overwhelming majority (96.3%) of visitors (interviewed in commercial lodgings), cite vacationing as a primary reason for coming to Lee. Conventions, business meetings, and conferences represent 17.0% of '96 visitation.
14. An important statistic for Lee's tourism industry is the effect of travel agent assistance in directing visitors to the area. Since '96, the ranks of visitors who mention being assisted by a travel agent, in planning their trip to Lee, has moderated from 42.1% to 40.7%. However, a growing proportion of these visitors cite vacation packages booked through an agent (1996: 17.7%; 1997: 31.6%).
15. As last year, the '96 Lee visitors are very satisfied (89.3%) with their stay and will, at the 95.8% level, recommend the Lee Island Coast to their friends, relatives, and acquaintances for a vacation.

Better than eight of every ten visitors, moreover, plan to return to our area (84.4%), with almost two of every three visitors (64.2%) intending to return next year (1995 return: 82.7%; 1995 next year: 61.9%).

16. The group of **LIC** travelers who report seeing, reading, or hearing promotional messages has increased significantly (1995: 29.3%; 1996: 32.8%). Travel and visitor guides are cited by 65.0% (1995: 59.8%). The ranks of people saying they were influenced by **LIC** messages stands at 66.2% ('95: 59.8%).
17. Fully 64.5% of our visitors use a computer. Of these, 40.5% use on-line services. Some 31.7% of these obtain travel information and 1.8% buy travel services on-line.