

1997 Lee County Visitor Profile

Executive Summary

1. Tourism is Lee County's number one industry. In 1996, including multiplier effects, tourists spent better than \$1.2 billion in the County, with 1,715,090 visitors enjoying the Lee Island Coast [**LIC**]. For the year 1997, Lee's tourism industry injected \$1.3 billion of visitor spending to the County's economy. These visitation and expenditure levels represent all time peaks for the industry.
2. **LIC's** European statistics reflect the moderation of the economic difficulties that effected our feeder markets on the Continent and elsewhere in Europe. Our estimates place European visitation at the 211,774 mark (-1.2%). Most importantly, however, Lee's market share in key Northeastern and Midwestern markets increased significantly (Northeast: +4.3%; Midwest: +3.5%).
3. The Nation's tourism industry has undergone significant transformations over the past five (5) years. Most of these changes are structural in nature and of a socio-economic, demographic, and competitive origin.

After W.W. II, the U.S. experienced rapid population growth. This baby boom generation first impacted education, then housing and job markets. Today, baby boomers are increasingly empty nesters frequently traveling as couples on 3-4 night get-aways. Importantly, this market segment is financially well-off, "youth-oriented," mobile, and focused on quality products/services. These consumers are busy, economically active, and make traditional vacation marketing most challenging for the industry.
4. As a consequence, **LIC's** share of the couples market has been increasing (1996: 65.6%; 1997: 66.5%). Couples are more likely to fly and the adult household members tend to hold full-time jobs.
5. The family market has, however, not lost its significance to Lee tourism. Competition for this important market is intense and increasingly segmented. Economic and social forces have impacted family tourism as well. Female labor force participation and divergent school holiday schedules, alone, make family vacation planning complex.

1997 Lee County Visitor Profile

6. **LIC's** markets are upscale and composed mostly of professionally and/or technically trained individuals. For many, the pressures of professional life leave little time to research multiple, alternative get-away/vacation options. In the industry, this is known as the "Time Poverty Paradox." Travelers seek single-source information for destinations that offer packages, joining multiple vacation elements. These consumers demand quality, value for the money, and the timely delivery of the product as promised.
7. As a result of these factors, the length of time visitors can spend in the County had declined dramatically. Since 1984, the length of stay has dropped by five nights (1984: 12.9 days; 1997: 7.0 days). Given the demographic trends of the Nation, this decline is likely to continue, albeit at a decreasing rate. For the industry, this represents a growing marketing challenge.
8. The shrinkage of the length of the "traditional" tourism season is further accelerated by the growing availability of discount airfares. Today more than ever, Southwest Florida International Airport is the critical catalyst of future growth in tourism.
9. Lee's visitors are highly satisfied with their vacation experience in the County, with 96.2% recommending the destination to their friends, relatives, and acquaintances (1996: 95.8%).

Moreover, fully 87.9% of visitors plan to return (1996: 84.4%), with almost two of every three visitors (63.6%) intending to return next year (1996: 64.2%).
10. The County attracts highly educated and upscale travelers. In this vein, fully 69.8% of visitors say they use a computer. Of these, 61.0% use on-line services and some 46.2% of these obtain travel information. Fully, 6.7% now buy travel services on-line.