

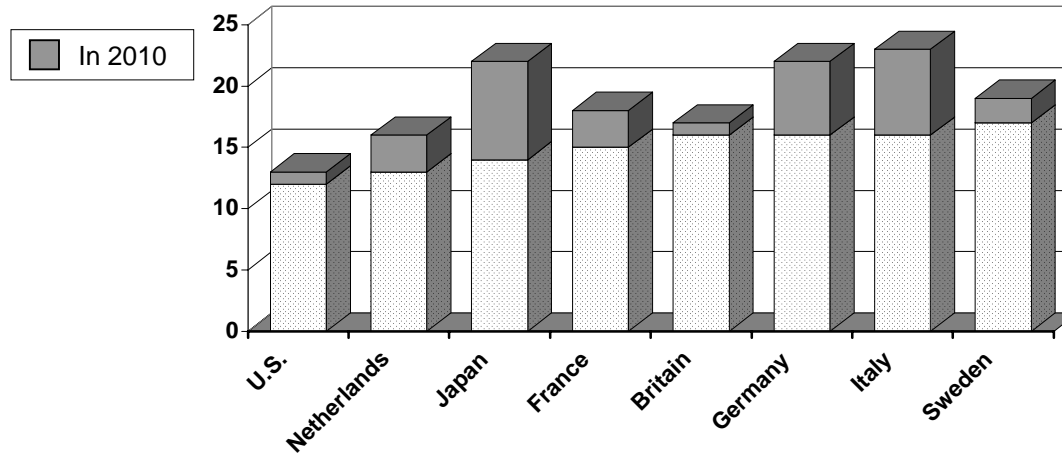
## The Visitor Profile of Lee County: 1999 Year-End Summary

### *Executive Summary*

- 1.** Tourism is Lee's number one industry. In 1999, H/M/C visitors had a direct expenditure impact of \$971,709,577 (+6.0%). With the multiplier effect, this represents a \$1,632,180,576 injection into the County's economy [1999 H/M/C visitors: 1,866,123 (+3.5%)]. These visitation and expenditure levels represent all time peaks for the industry.
- 2.** Over the first nine months of 1999, the U.S. dollar's value against several foreign currencies has been moderately declining, sparking concerns about the long run stability of tourism as an export. This is particularly significant since Great Britain and the German-speaking countries represent the lion's share of **LIC's** foreign markets. Our 1999 **LIC** estimates indicate a census of 226,084 European visitors [United Kingdom visitors: 67,427 (+2.6%); German-speaking visitors: 122,821 (+4.2%)].
- 3.** The U.S. and **LIC's** tourism industries have experienced important structural socio-economic, demographic, and competitive changes, with the advent of the baby boom generation. Baby boomers are typically empty nesters, financially well off, mobile, and get-away package trip oriented. Interestingly, our foreign markets mirror this trend.

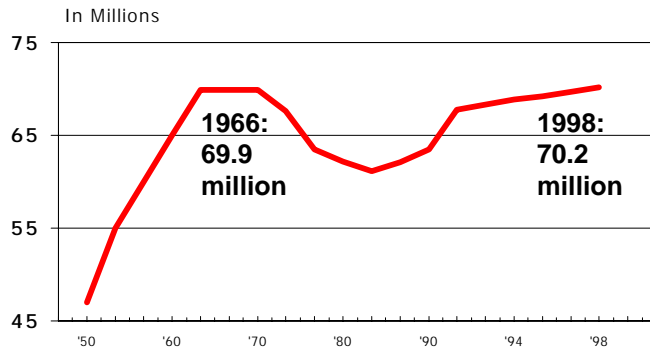
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### Aging: % Over 65 (by Country)

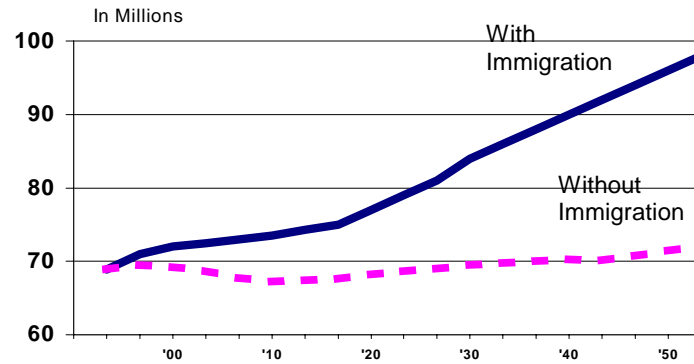


4. Tourism is an industry that requires constant regeneration of potential visitors. Note must be taken that in the wake of the baby boom generation, the ranks of potential visitors are strongly affected by the changing demographics of birthrate and U.S. immigration.

### Total U.S. Population Under 18



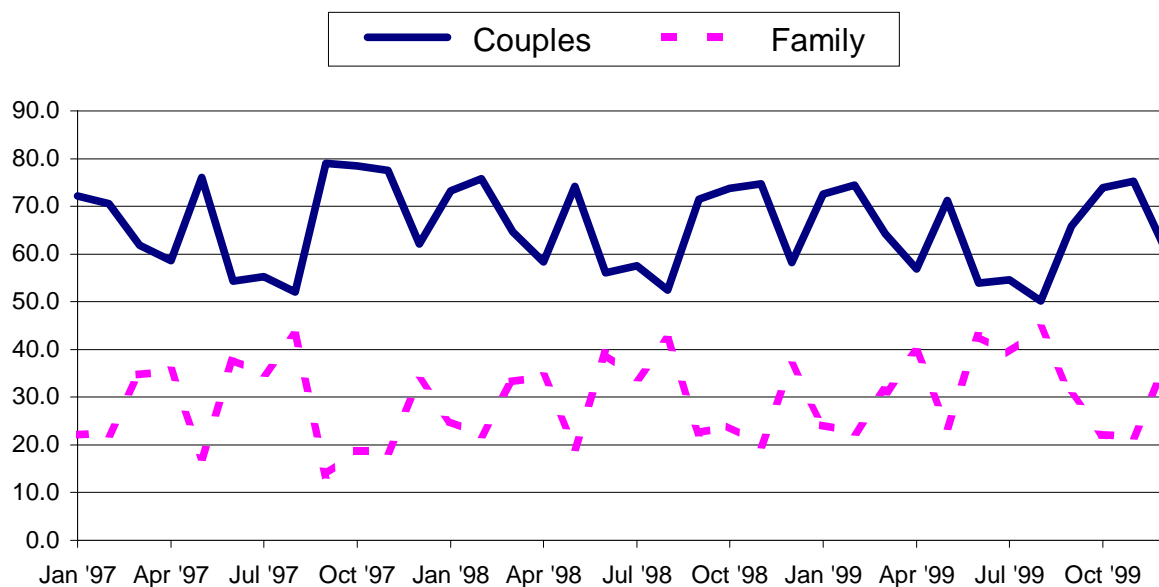
### Forecast Children Under 18



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- 5.** *LIC's* markets are typically upscale, and professional and technical in occupation. For many, the "Time Poverty Paradox" dictates information and offers that conveniently package travel products. Quality, value for the money, and convenience are the primary focus for these market segments.
- 6.** Although *LIC's* share of the family market has begun to increase moderately, the couples market remains the most dominant visitor segment. Importantly, competition for the family market is intense and increasingly segmented. Although travel is typically a joint decision, children hold important input to destination choices.

**LIC Couples/Family Visitation Trends**



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7. Over the past year, the internet has gained even more marketing significance. For the year 1999, **LIC's** visitors internet involvement is as follows:

