COLLIER COUNTY, FLORIDA

2019 TOURISM IMPACT REPORT

VISIT PARADISECOAST.COM

NAPLES
MARCO ISLAND
EVERGLADES

FLORIDA'S PARADISE COAST
Naples, Marco Island and the Everglades are home to unsurpassed beauty and diversity. From world-class beaches, resorts, dining and recreation to sweeping sawgrass prairies and wetlands teeming with wildlife, Florida's Paradise Coast offers a wide range of choices for relaxation and recreation. Here, the quaint and historic blend seamlessly with the elegant and modern.

Tourism is important business for Naples, Marco Island and the Everglades. As the leading employer and the primary economic engine for the region, the tourism industry is responsible for more than 38,500 jobs in Collier County. More than 2 million visitors in 2018 spent more than $1.5 billion, resulting in a total economic impact of more than $2.1 billion to Collier County. Tourist development taxes pay for extensive beach renourishment, inlet management and beach park facilities programs in Collier County, along with county museum operations, and special events. They also help fund our destination's marketing efforts through the Convention and Visitors Bureau, and promotion of tourism businesses through advertising and public relations.

Local residents also benefit from the tourism industry through enhanced amenities in the community and tax savings. In 2018, each household enjoyed an estimated tax savings of $1,000, thanks to the expenditures of visitors to our area. Collectively, these visitors contributed more than $28 million in tourist development taxes in our region, and provided $130 million in sales and gas tax revenue in 2018.

Our mission is to promote distinctive, world-class vacation, group meeting, and sports experiences, which result in positive economic growth and stability for Collier County. Every year, we are proud to welcome visitors to explore Naples, Marco Island and the Everglades. And in this report, we are proud to share the phenomenal impact that their visits had on our county last year.

Jack Wert, Executive Director
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ParadiseCoast.com
FLORIDA'S PARADISE COAST HOTELS

AVG HOTEL DAILY RATES

$236.50

HOTEL OCCUPANCY 74.7%

ANNUAL HOTEL ROOM NIGHTS

2,315,000 2,439,600 2,364,300 2,380,700 2,532,900

2M

RECENT AWARDS & RECOGNITION

2019 HOSPITALITY, SALES AND MARKETING ASSOCIATION INTERNATIONAL ADRIAN AWARDS

Out of more than 1,100 entries submitted last year, The Paradise Coast—Naples, Marco Island and The Everglades—Collier County CVB work was judged to be exceptional by experts in hospitality, travel, tourism and media.

SILVER
Lowe's Influencer Campaign

SILVER
“Love, Paradise” Winter Campaign

SILVER
“Love, Paradise” Leisure Brand Video

Source: 2015-2019 Annual Visitor Profiles by Research Data Services, Inc.
DIRECT VISITOR EXPENDITURES

<table>
<thead>
<tr>
<th>Year</th>
<th>Expenditures</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>$1,195,810,000</td>
</tr>
<tr>
<td>2016</td>
<td>$1,328,627,700</td>
</tr>
<tr>
<td>2017</td>
<td>$1,373,918,000</td>
</tr>
<tr>
<td>2018</td>
<td>$1,436,686,500</td>
</tr>
<tr>
<td>2019</td>
<td>$1,552,496,600</td>
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</table>

PER PERSON/PER DAY

<table>
<thead>
<tr>
<th>Year</th>
<th>Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>$155.31</td>
</tr>
<tr>
<td>2016</td>
<td>$166.20</td>
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<tr>
<td>2017</td>
<td>$170.96</td>
</tr>
<tr>
<td>2018</td>
<td>$179.96</td>
</tr>
<tr>
<td>2019</td>
<td>$186.30</td>
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</table>

VISITOR SALES & GAS TAX

Total: $147,068,300

TOTAL ECONOMIC IMPACT

Total: $2,314,772,300

TOURISM INDUSTRY SUPPORTED JOBS

<table>
<thead>
<tr>
<th>Year</th>
<th>Jobs</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>30,000</td>
</tr>
<tr>
<td>2016</td>
<td>35,000</td>
</tr>
<tr>
<td>2017</td>
<td>40,000</td>
</tr>
<tr>
<td>2018</td>
<td>45,000</td>
</tr>
</tbody>
</table>

2019 TAX SAVINGS PER COLLIER HOUSEHOLD

$1,043

Source: 2015-2019 Annual Visitor Profiles by Research Data Services, Inc.
Visitors to Florida's Paradise Coast in 2019

Visitors Per Year

<table>
<thead>
<tr>
<th>Year</th>
<th>Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>1,600,000</td>
</tr>
<tr>
<td>2016</td>
<td>1,700,000</td>
</tr>
<tr>
<td>2017</td>
<td>1,800,000</td>
</tr>
<tr>
<td>2018</td>
<td>1,900,000</td>
</tr>
<tr>
<td>2019</td>
<td>2,000,000</td>
</tr>
</tbody>
</table>

About Our Visitors in 2019*

- **Age**: 48.8
- **Party Size**: 2.6
- **Days Stayed**: 4.2
- **Household Income**: $160,201

- **Couples**: 56.5%
- **Families**: 32.6%
- **Singles**: 11.4%
- **Friends**: 4.3%

Visitor Activities

- **Dining**: 79.7%
- **Beach**: 78.9%
- **Relaxing**: 59.3%
- **Shopping**: 51.8%
- **Pool**: 45.1%
- **Sunsets**: 45.1%
- **Nature**: 37.5%
- **Sightseeing**: 27.7%
- **Reading**: 26.1%
- **Swimming**: 24.7%
- **Sunning**: 24.7%
- **Walking**: 24.3%
- **Nightlife**: 23.7%
- **Visit Relatives**: 20.4%
- **Arts**: 15.7%
- **Golf**: 15.5%
- **Other**: 8.3%

PARADISE COAST SPORTS COMPLEX

Development of the Paradise Coast Sports Complex, located in the City Gate Commerce Park at Collier Boulevard and I-75, is currently underway. When construction is complete, this state-of-the-art facility will feature 19 multipurpose athletic fields, eight baseball diamonds, a 5,500-seat championship venue, fitness area and a great lawn with a food truck pavilion. The first four athletic fields, championship venue, fitness area, and great lawn are scheduled to open by summer 2020, with the rest of the facility slated for completion by 2021. Visit sportsforceparksnaples.com to track project progress, see a full list of amenities and monitor upcoming events.

ARTS AND CULTURE STRATEGIC PLAN

The Collier County Arts and Culture Strategic Plan aims to celebrate creativity in Collier County. The result of a long-term collaborative effort of Collier County government; the Naples, Marco Island, Everglades Convention and Visitors Bureau; and the United Arts Council, its mission is to evaluate, establish and successfully promote Collier County as an arts and culture destination.

The plan embodies two specific commitments. The first is a commitment to building the foundation for Collier County to become an arts and cultural destination, telling the story of the genuine culture of Collier County as an integral part of the visitor experience. Secondly, it is a commitment to celebrate, support and build local arts, creativity and culture to enrich the quality of life for residents of all ages and backgrounds.

In making Collier County a true arts and cultural destination, the county and the economy seek to diversify their customer base and revenues, providing a more sustainable economic development strategy.