



NAPLES MARCO ISLAND EVERGLADESSM

FLORIDA'S PARADISE COAST

Hurricane Sentiment Study

February 2023



NAPLES MARCO ISLAND EVERGLADESSM

FLORIDA'S PARADISE COAST

Introduction




NAPLES · MARCO ISLAND
EVERGLADESSM
FLORIDA'S PARADISE COAST

 downs & st. germain
RESEARCH

Study Purpose & Research Methods

● Study Purpose

Determine the impact of Hurricane Ian on consumers' feelings about travel to the Paradise Coast. This is the 1st wave of multiple waves of the survey to see how consumer sentiment changes over time.

● Research Methods

Online surveys with 521 consumers in Chicago, New York City, Detroit, Cleveland, Boston, Minneapolis-St. Paul, Philadelphia, Hartford, Miami/Ft. Lauderdale, the Tampa area, and Orlando.

- Wave 1 - February 9-20, 2023

Consumers were adults age 21+ who earned at least \$75,000 per year in household income, served as key decision-makers in where their households take vacations, and have taken at least one vacation to a beach destination in Florida in the past 10 years.



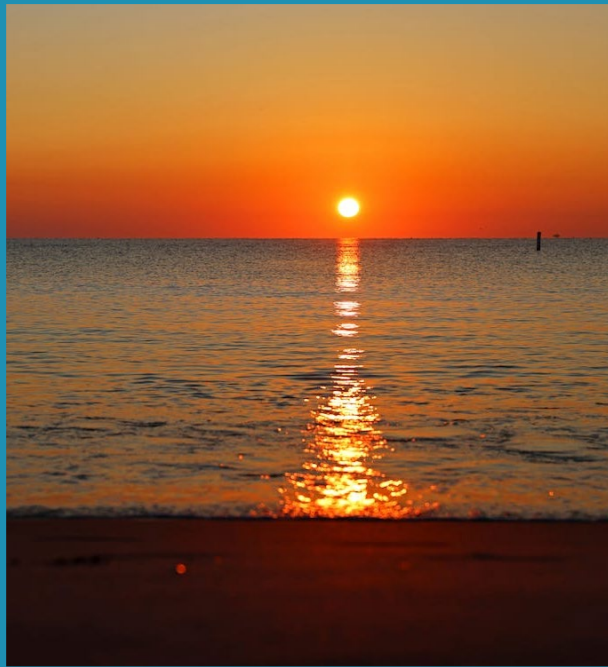


NAPLES MARCO ISLAND EVERGLADESSM

FLORIDA'S PARADISE COAST

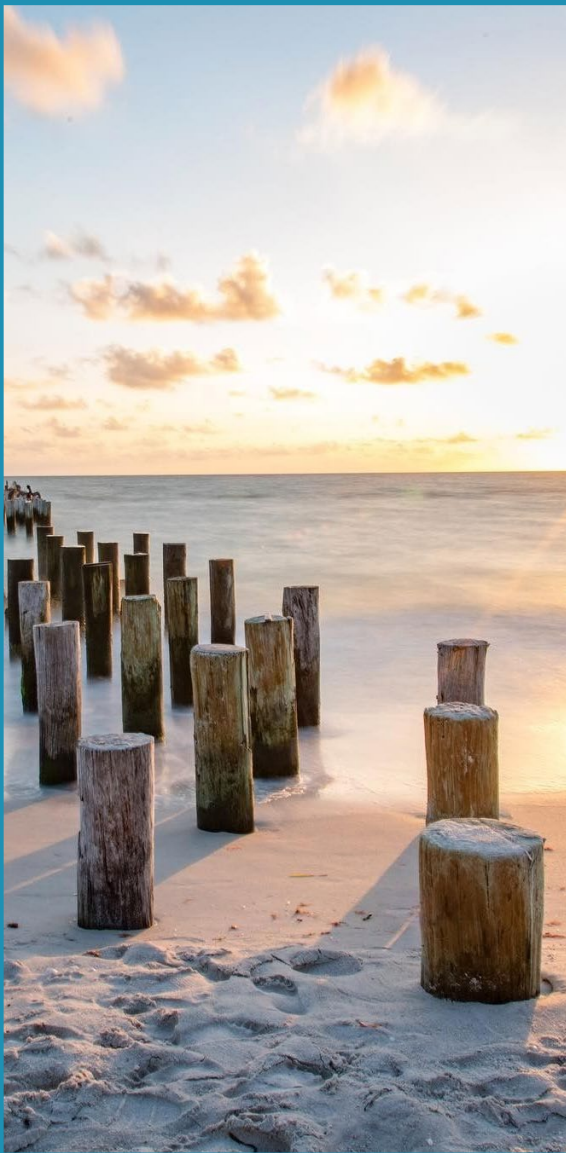
Key Takeaways





Key Takeaways:

- Top of mind awareness of the aftermath of Hurricane Ian is low
 - 1% of potential visitors mentioned they wouldn't plan on trip to the Paradise Coast due to the hurricane
- 1% of potential visitors reported cancelling a trip to the Paradise Coast
 - The median rescheduled trip will be taken in late September 2023
- Nearly 4 in 5 potential visitors believe the Paradise Coast is ready welcome back visitors or received a limited impact from the storm
- Potential visitors who believe the Paradise Coast is not ready for visitors think it will be ready in Mid July 2023



Key Takeaways:

6

- Potential visitors are most confident the restaurants and shopping are ready for visitors
- 1 in 6 potential visitors believe the beaches in the Paradise Coast are not ready to welcome back visitors.
 - This is an educational opportunity to highlight working beaches
- When give a chance to give a word or phrase about the current state of the Paradise Coast, 2 in 5 potential visitors mentioned hurricane damage or a state of rebuilding
- Friends & family are the top trusted source regarding the status of Southwest Florida as a travel destination
- Despite the hurricane, beautiful beaches and water are the top draw to visiting the area followed by weather



NAPLES MARCO ISLAND EVERGLADESSM

FLORIDA'S PARADISE COAST

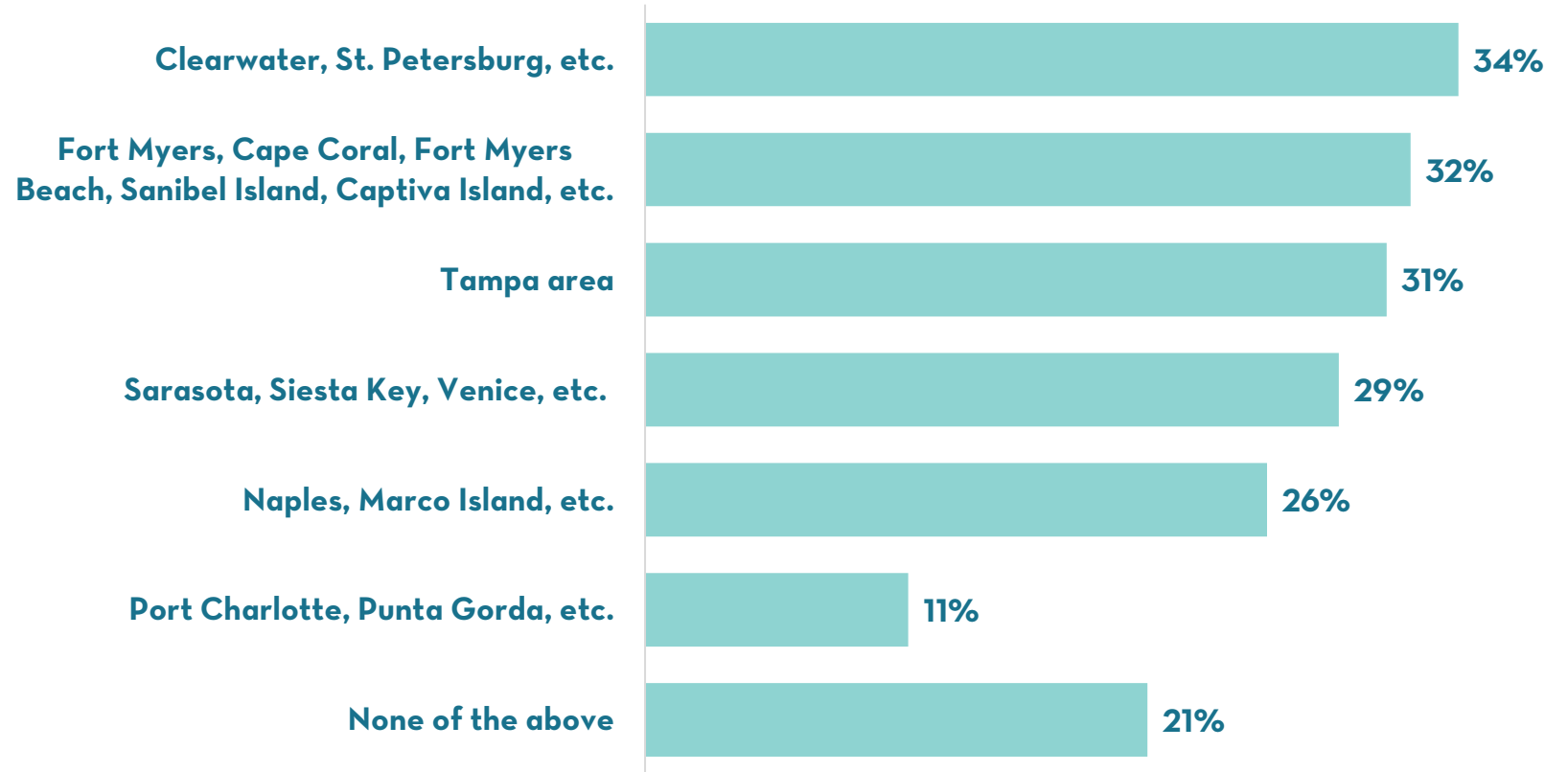
Detailed Findings



Visiting Florida in the coming year

1 in 4 consumers plan on visiting the Paradise Coast in the coming year

Visiting Florida in the coming year*



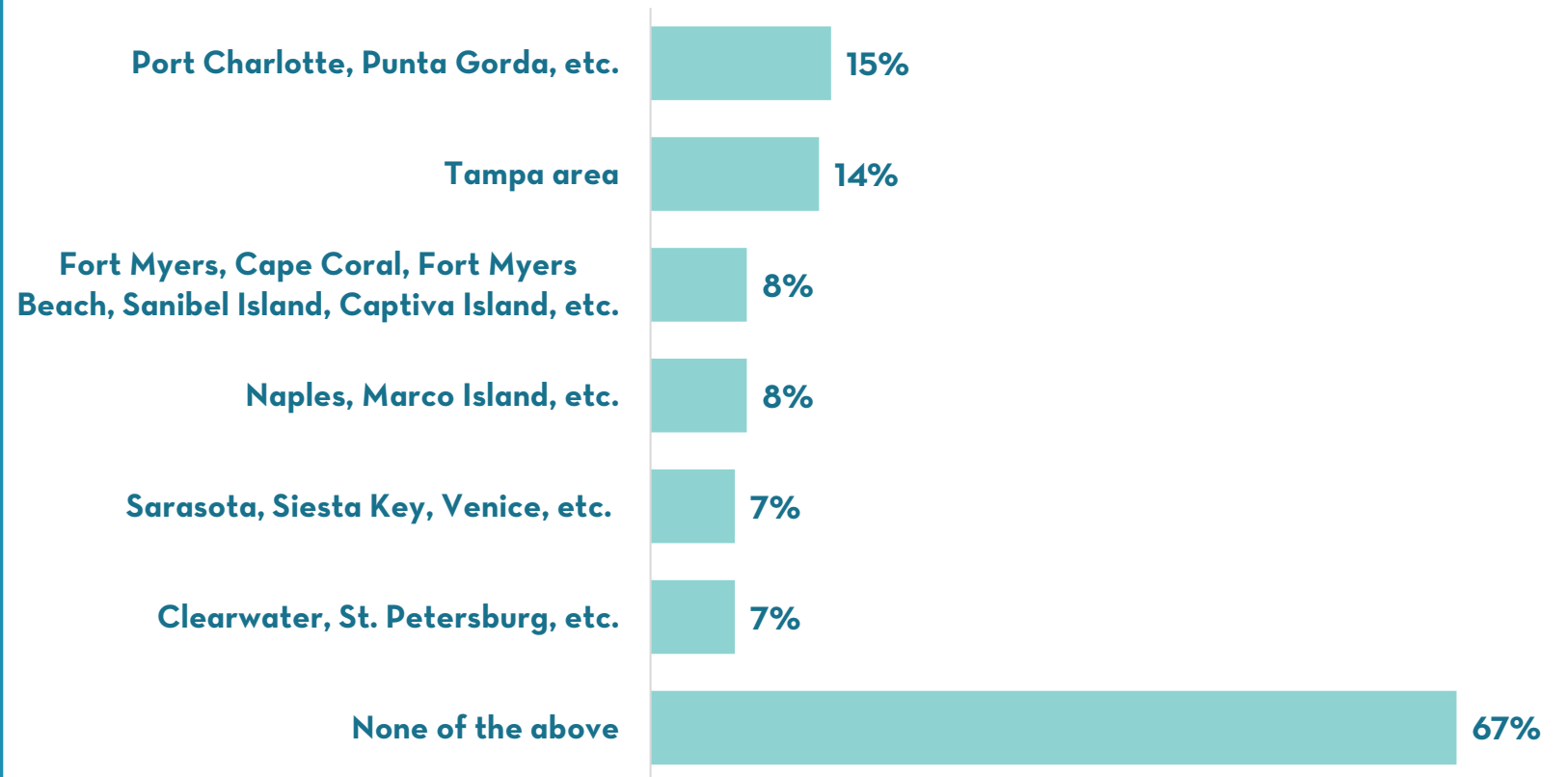
*Full Question: Do you plan to visit any of these areas in Florida in the coming year?
Multiple responses permitted.

Areas not considered for Florida Vacation

Only 1 in 12 consumers stated that they would not consider the Paradise Coast during the planning phase of their trip

Only 1% would of all potential visitors would not consider the Paradise Coast due to hurricane related reasons

Areas not considered for Florida Vacation*



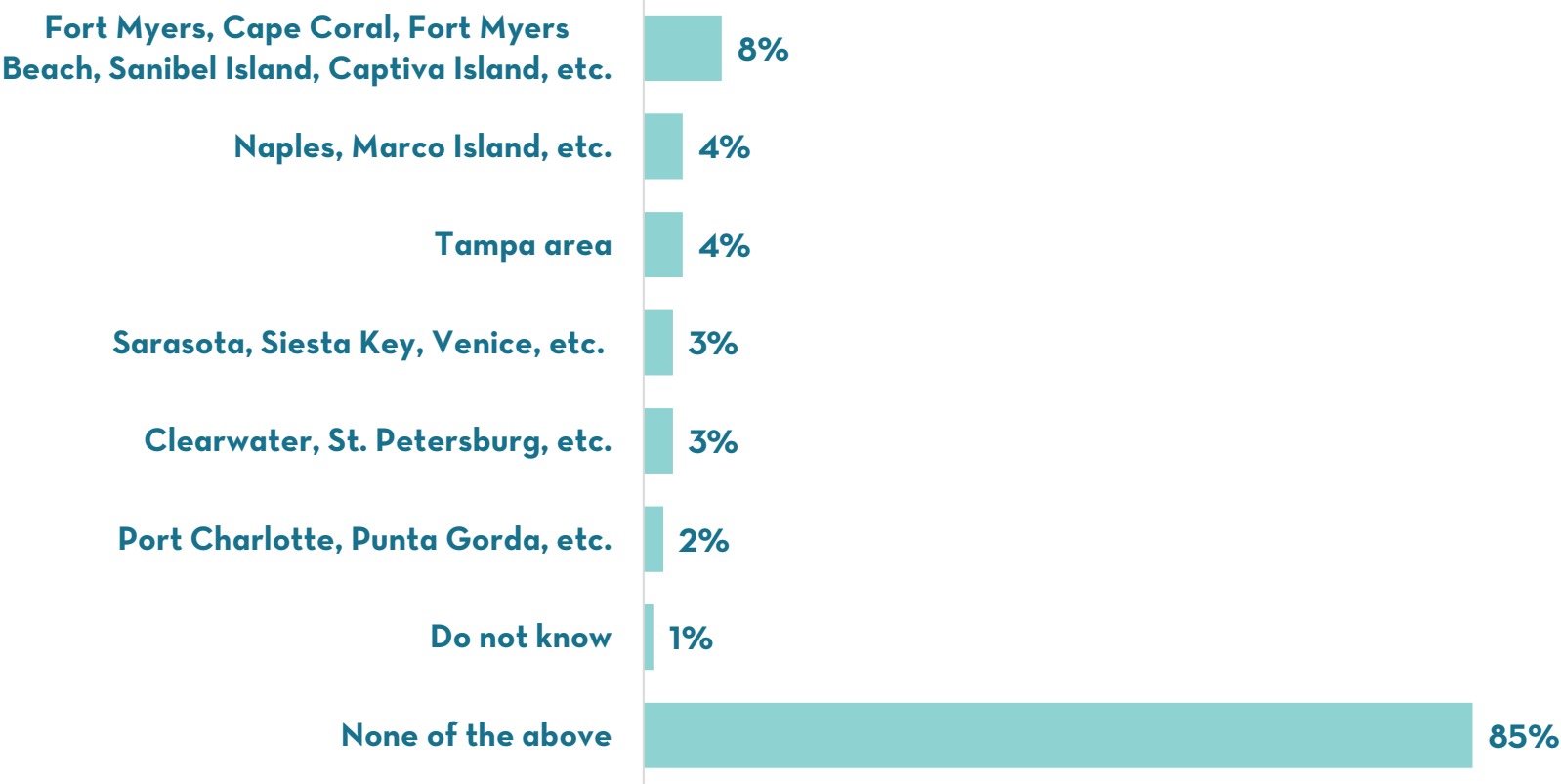
*Full Question: If you were to take a vacation in Florida, are there any of the following areas that you would NOT consider?
Multiple responses permitted.

Trip Cancellations

Only 1 in 25 consumers stated that they had to cancel a trip to Paradise Coast during the past 6 months

1 in 5 who cancelled their trip to the Paradise Coast did so for hurricane-related reasons

Trip Cancellations*



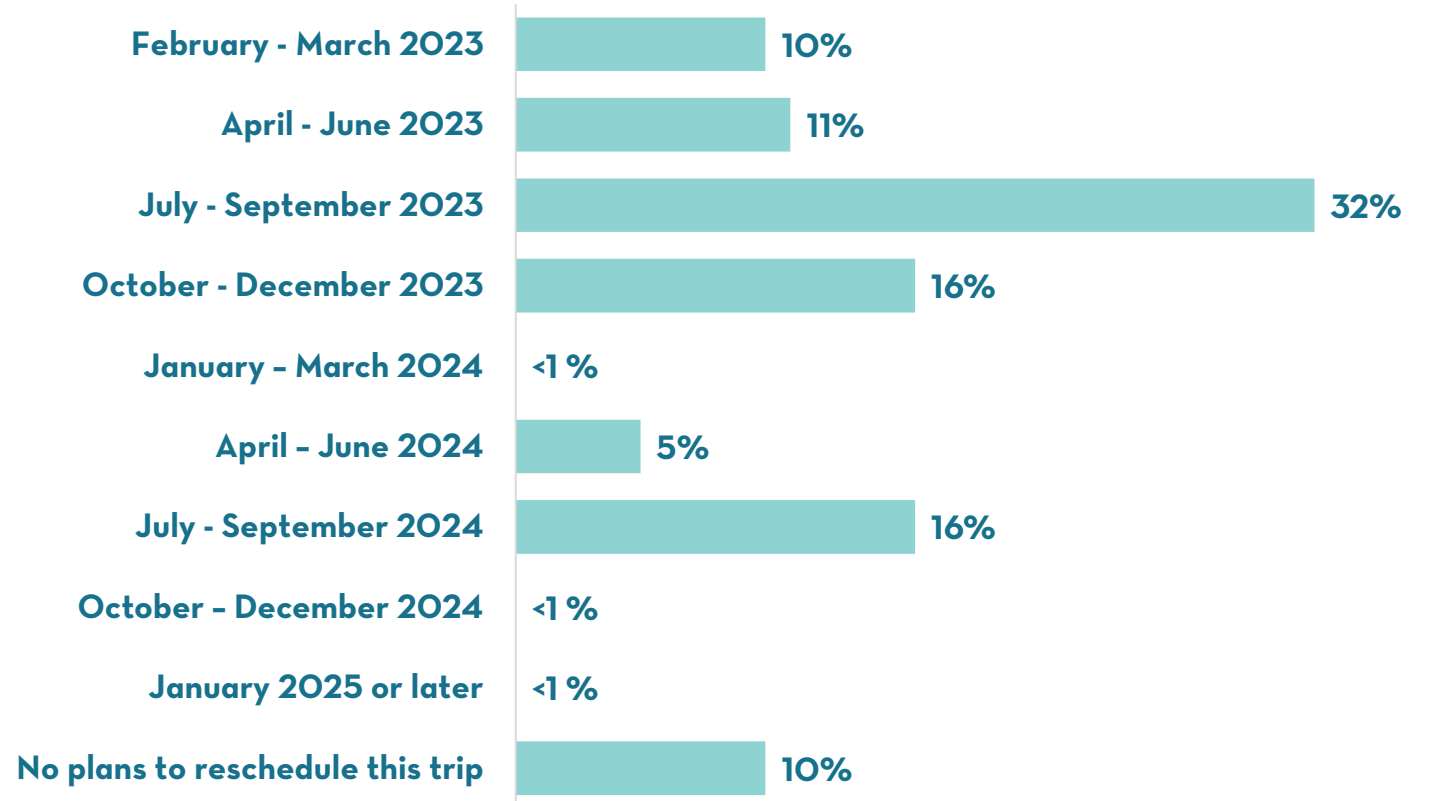
*Full Question: Did you cancel any vacations to any of the following areas in the past six months?
Multiple responses permitted.

Trip Rescheduling To Return to Naples/Marco Island Area

1 in 3 consumers stated that they plan to reschedule the trip for July - September 2023

Median date of rescheduling: September 22, 2023

Trip Rescheduling To Return to Naples/Marco Island Area*

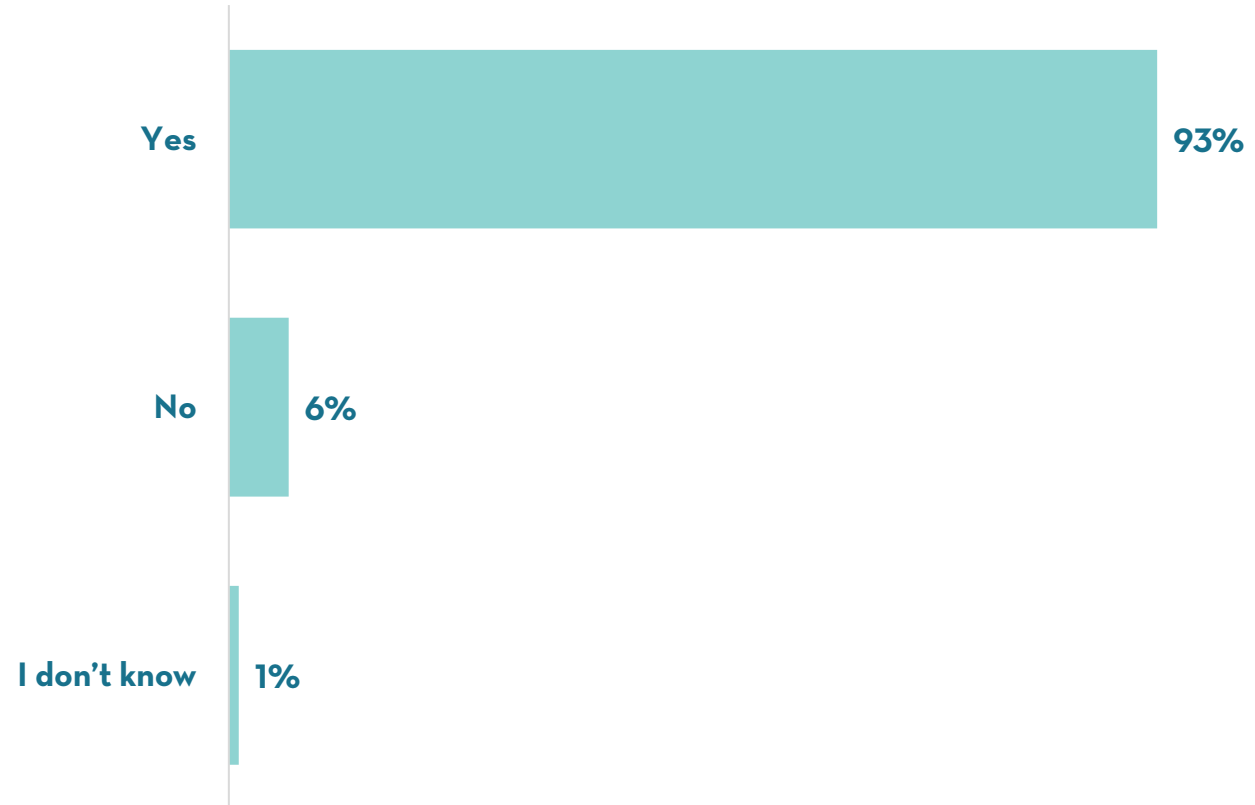


*Full Question: When do you plan to reschedule this trip to the Naples/Marco Island area?

Hurricane Landfall Recall

Over 9 in 10 consumers recalled seeing news about Hurricane Ian making landfall in Florida in late September 2022

Hurricane Landfall Recall*



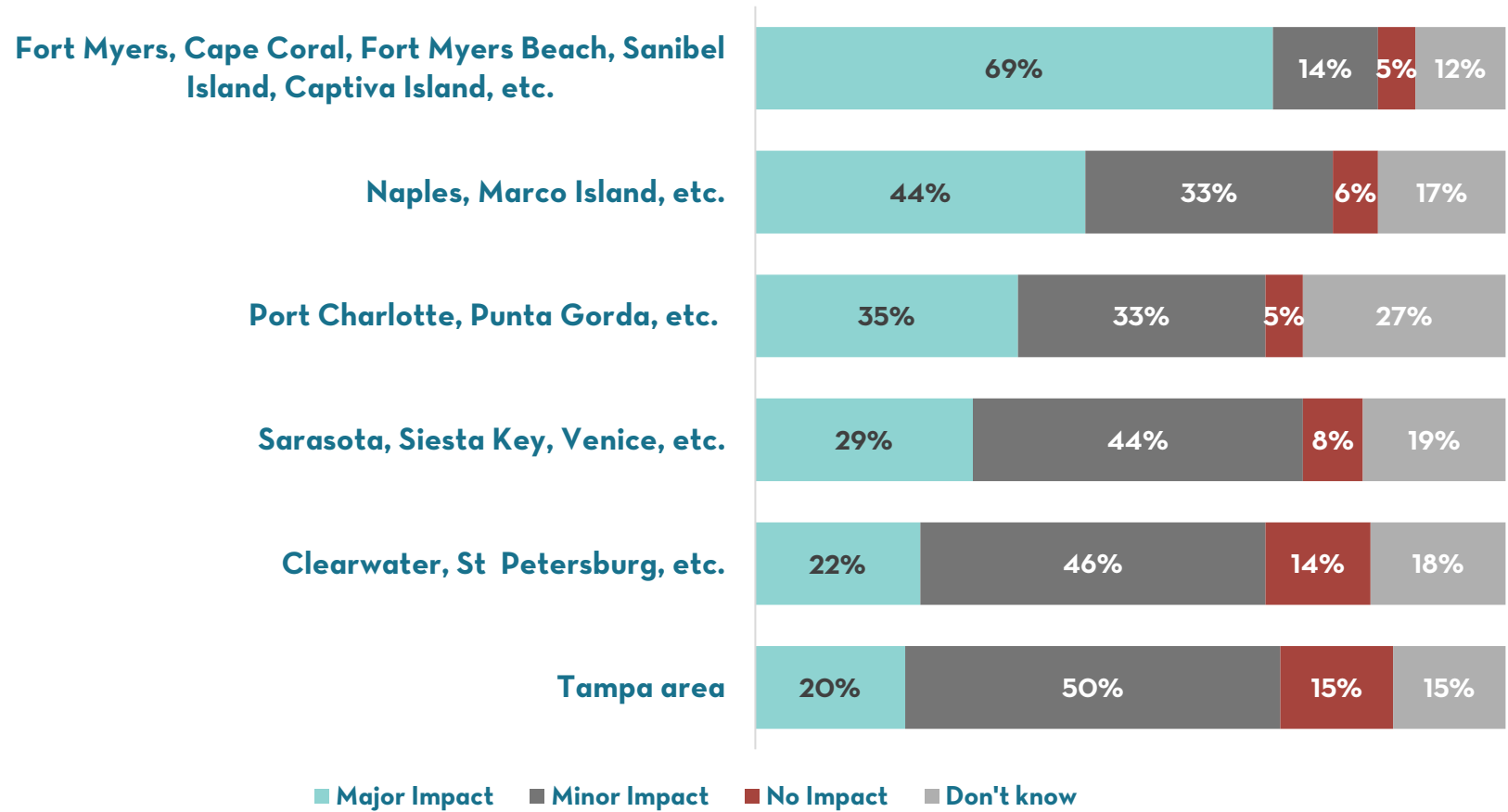
*Full Question: Do you recall seeing news about Hurricane Ian which made landfall in Florida in late September 2022?

Perceived impact of Hurricane Ian in Florida areas

2 in 5 consumers consider Hurricane Ian to have had a major impact on the Paradise Coast

Nearly 1 in 4 consumers believe the Paradise Coast received no impact or do not know

Perceived impact of Hurricane Ian in Florida areas*

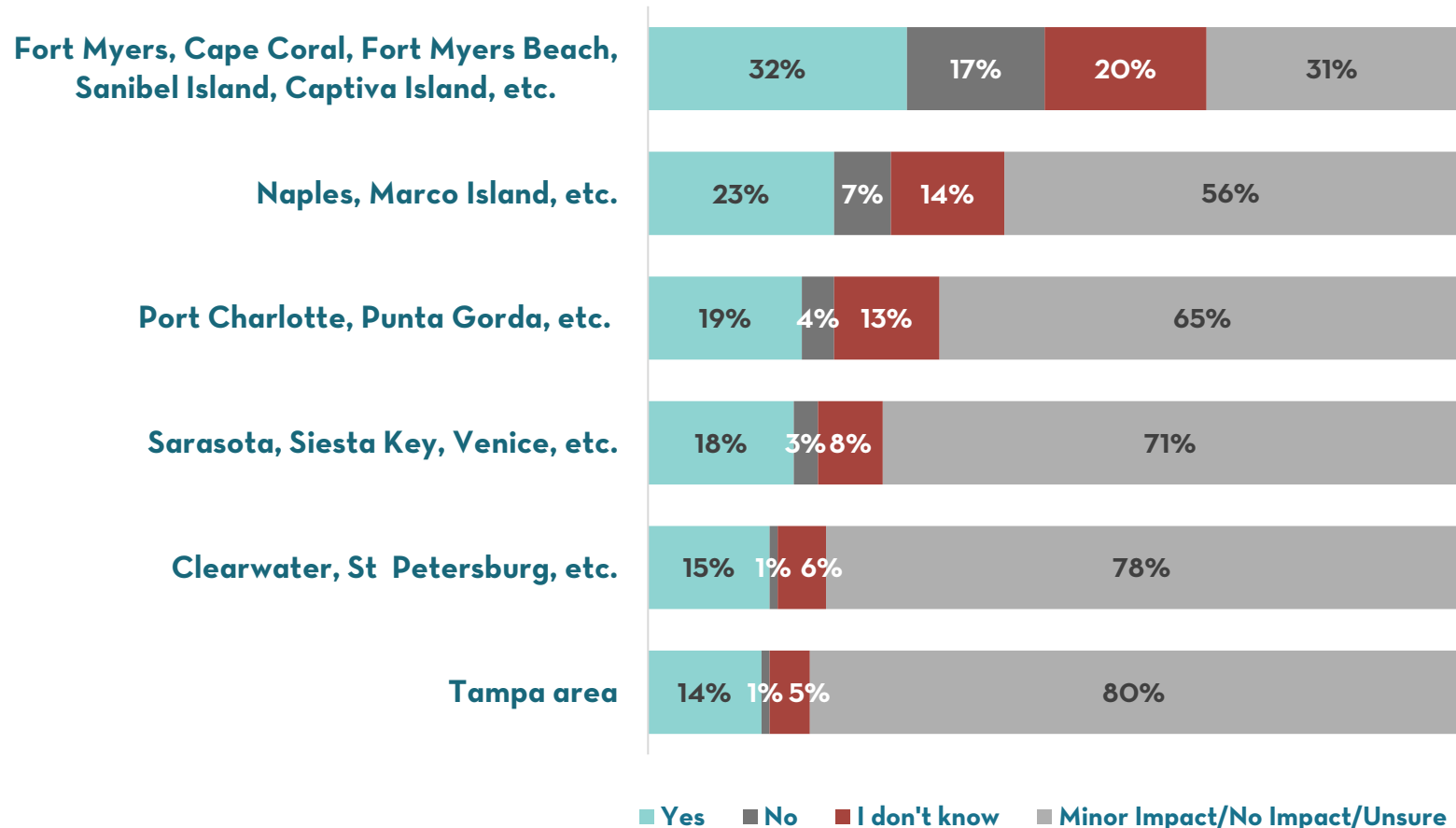


*Full Question: How significant was the impact of Hurricane Ian on the following areas?

Perceived readiness of each area to welcome visitors

Nearly 4 in 5 consumers find the Paradise Coast ready to welcome visitors after Hurricane Ian or the area received limited impact

Perceived readiness of each area to welcome visitors*



*Full Question: Which of the following geographic areas are ready to welcome visitors?

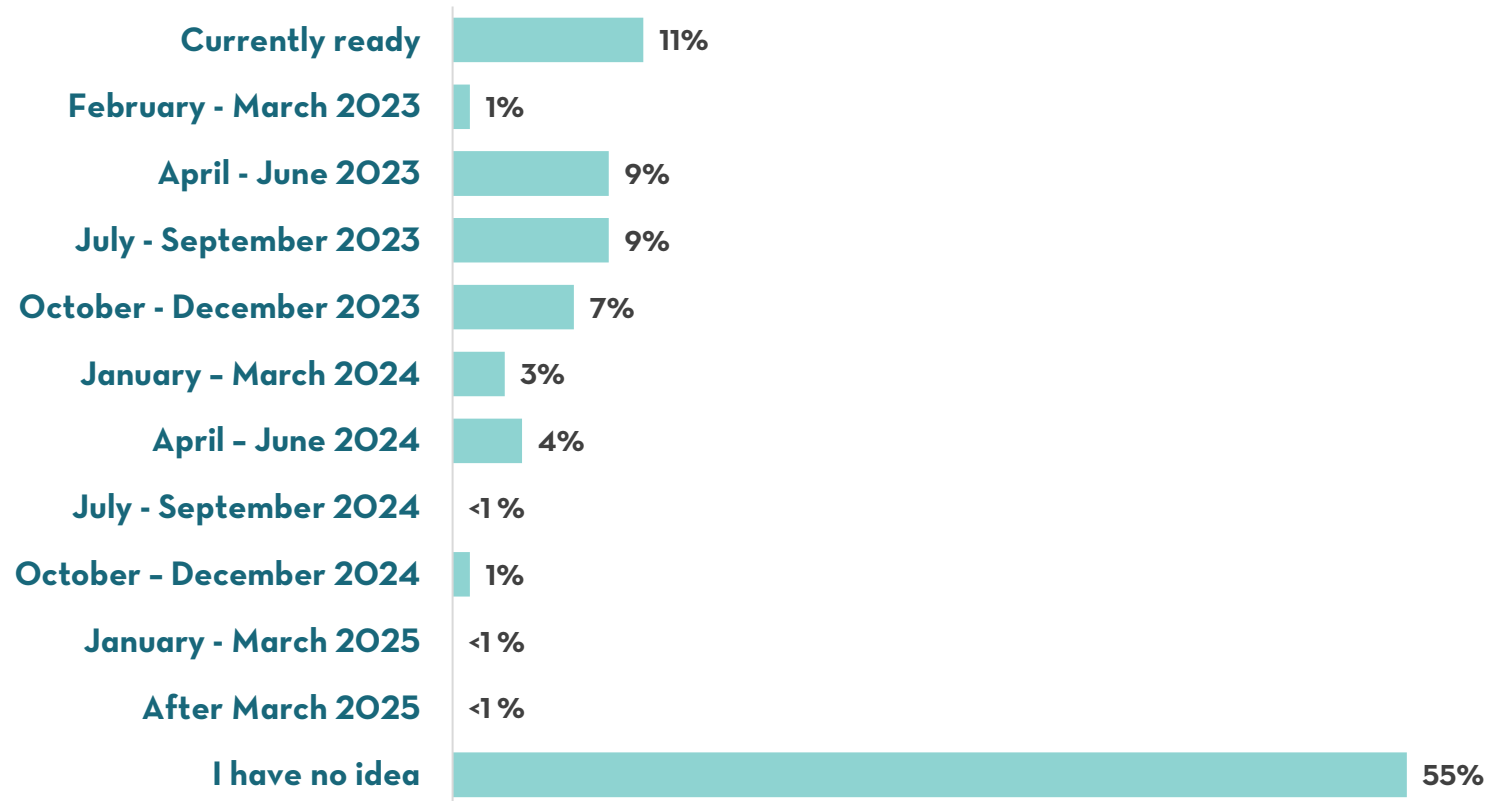
Perceived readiness timeline

Nearly 3 in 5 consumers who do not believe the Paradise Coast are not ready for visitors don't know when the area will be ready to welcome visitors after Hurricane Ian

Median date of readiness among those who believe the area is currently not ready for visitors (representing 21% of all consumers):

July 15, 2023

Perceived readiness timeline*

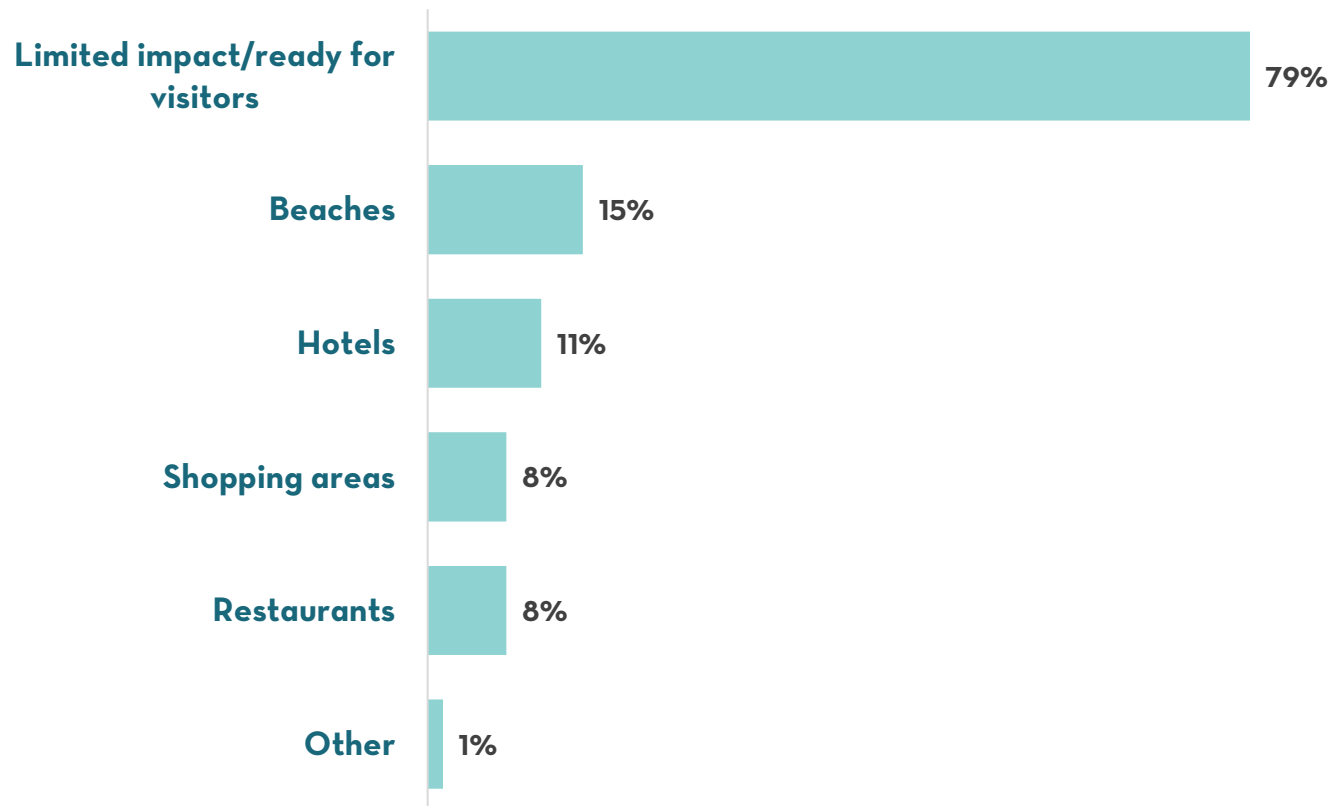


* Full Question: When will the Naples/Marco Island area be ready to welcome visitors?

Perceived readiness for attractions

Nearly 4 in 5 consumers who do not believe the Paradise Coast is ready to welcome visitors (15% of all consumers) do not think beaches are ready to welcome visitors after Hurricane Ian

Areas of the Paradise Coast NOT Ready for Visitors*



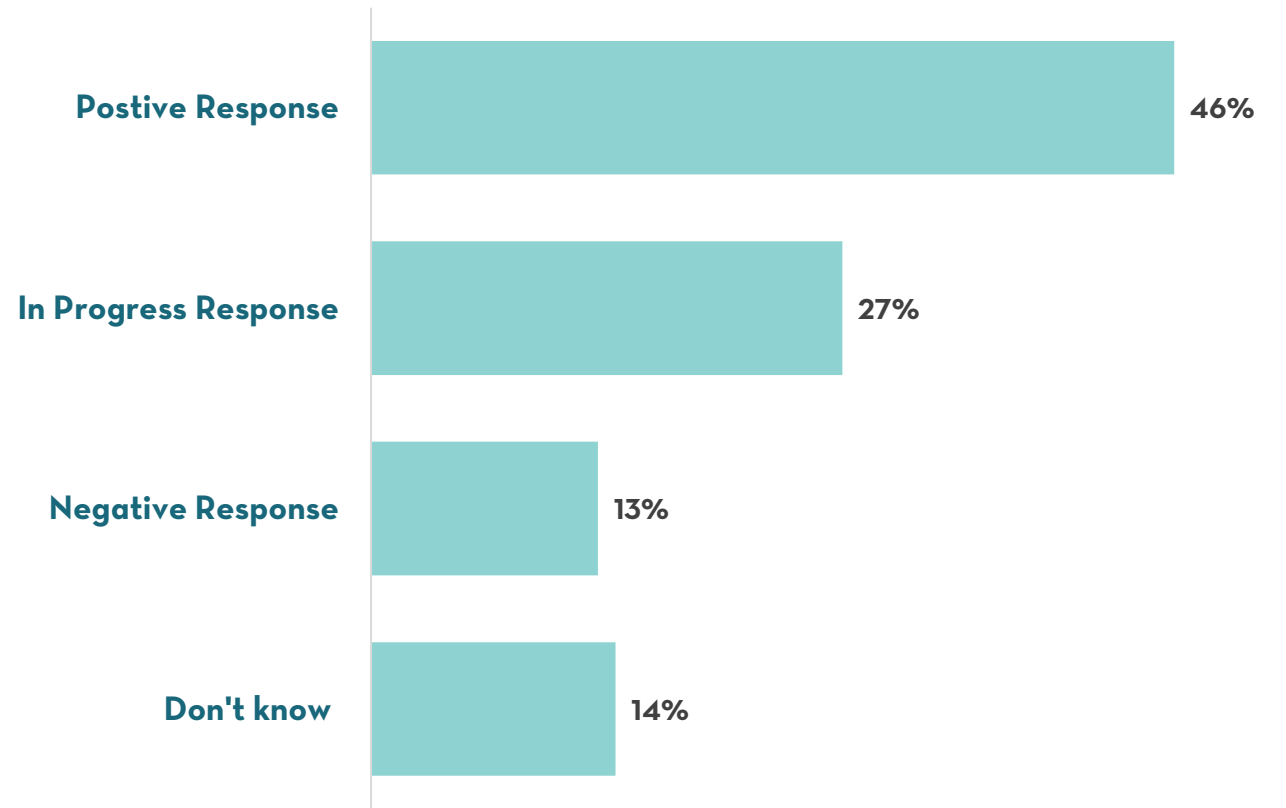
*Full Question: Which of the following places specifically are NOT ready to welcome visitors?

Multiple responses permitted.

Views on the current state of Naples

3 in 5 consumers viewed the current state of the Paradise Coast positively or don't know

Views on the current state of Naples*



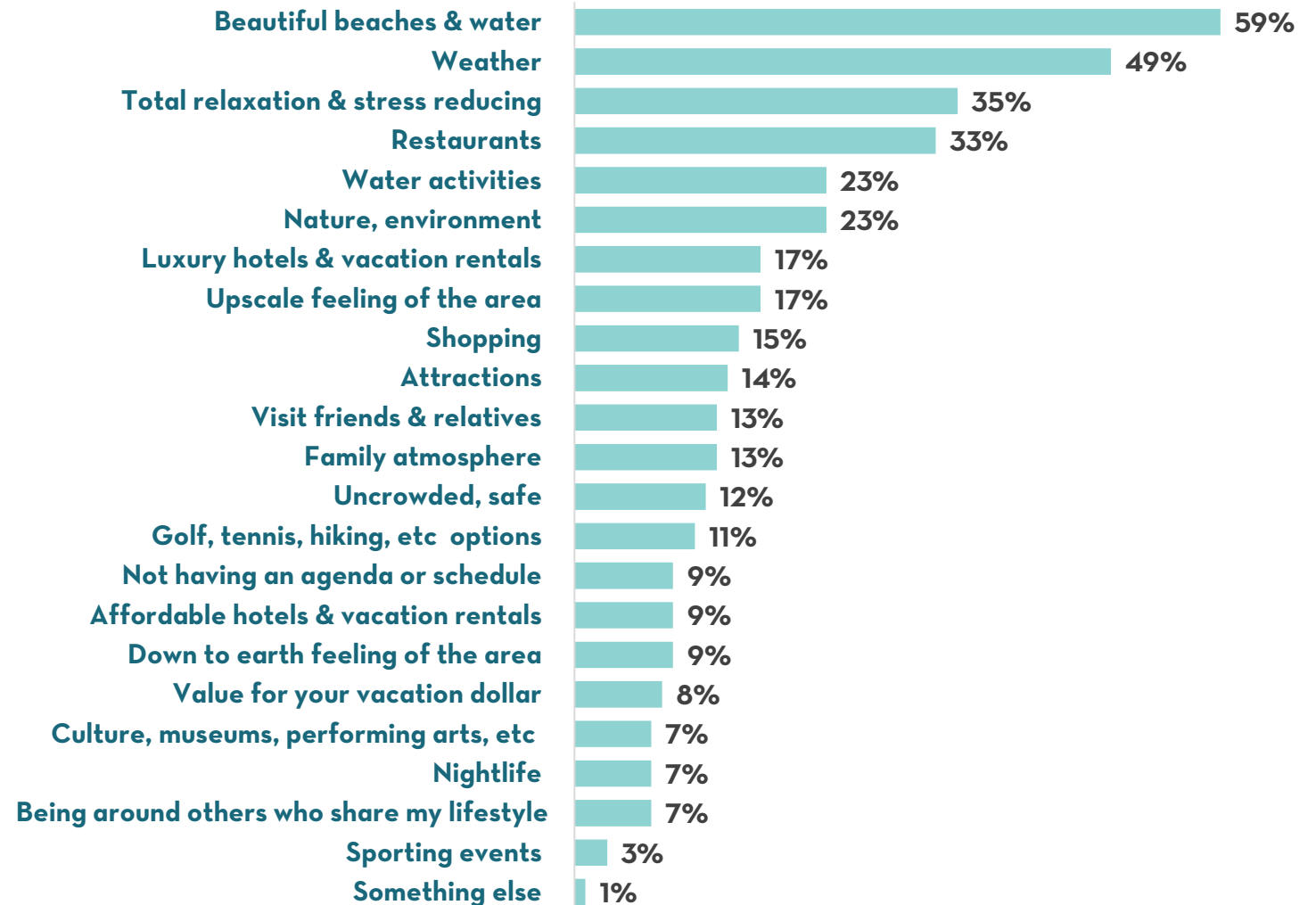
*Full Question: What one word or phrase best describes the current state of the Naples area?

Coded open-ended responses

Best Reasons to visit

Beautiful beaches and water are considered the best reasons to visit the Paradise Coast, followed by weather.

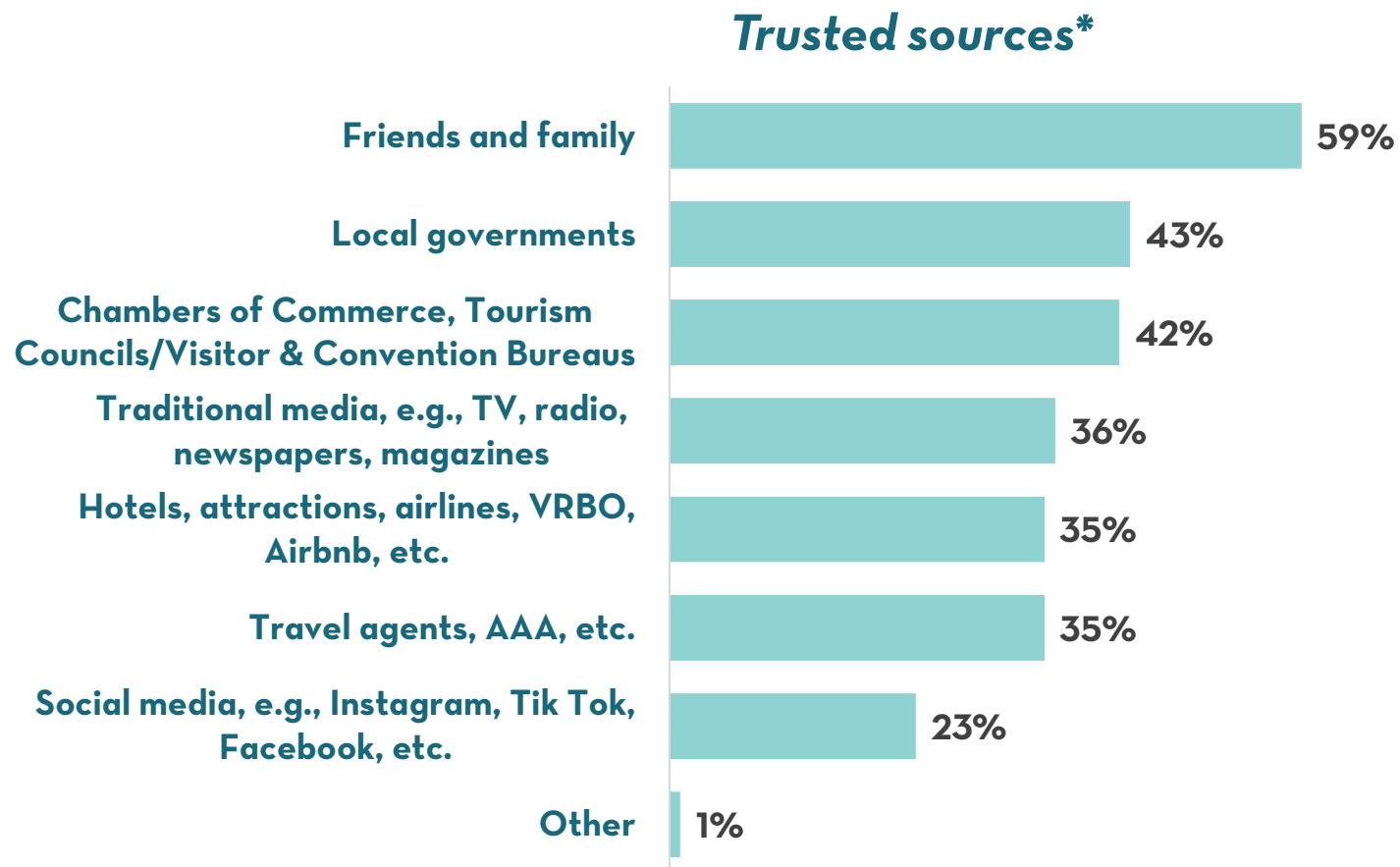
Best Reasons to visit*



*Full Question: What are the best reasons to visit the Naples/Marco Island area?
Multiple responses permitted.

Trusted sources

Friends and family are the most trusted source of information regarding hurricane recovery.



*Full Question: Who do you trust to tell you areas in southwest Florida are ready to welcome back visitors?

Multiple responses permitted.



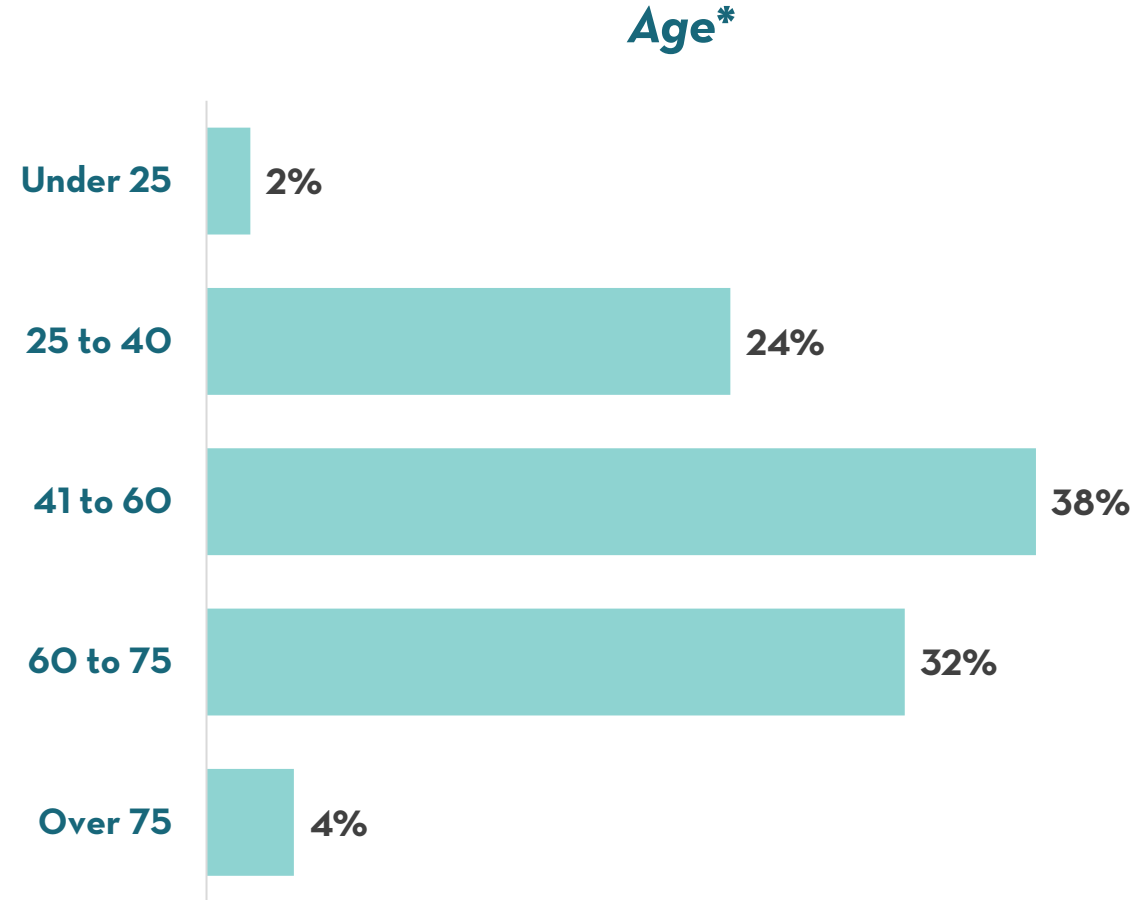
NAPLES MARCO ISLAND EVERGLADESSM

FLORIDA'S PARADISE COAST

Consumer Profile

Age

The median age was 54 years old



*Full Question: How old were you on your last birthday?

Income

The median income was
\$126,500

Income*

\$75,000 to \$149,999

66%

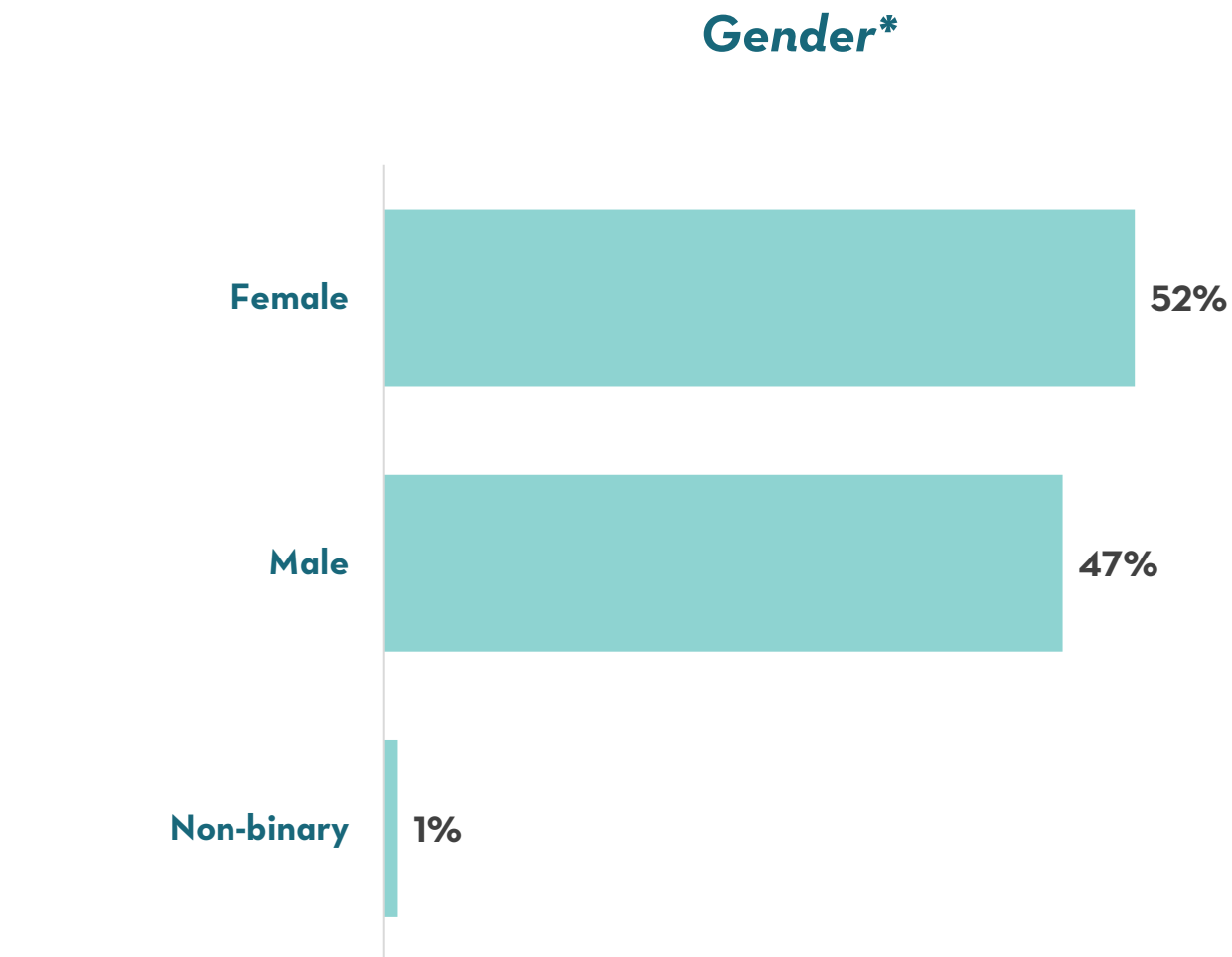
\$150,000 or more

34%

*Full Question: Which category best describes your annual household income in 2022 from all sources?

Gender

Consumers were slightly more likely to be female than male



*Full Question: To which gender identity do you most identify?



NAPLES MARCO ISLAND EVERGLADESSM

FLORIDA'S PARADISE COAST

Hurricane Study
February 2023

Downs & St. Germain Research
contact@dsg-research.com
850.311.9111