



NAPLES MARCO ISLAND EVERGLADESSM

FLORIDA'S PARADISE COAST

Hurricane Sentiment Study

March 2023




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Introduction

Study Purpose & Research Methods

● Study Purpose

Determine the impact of Hurricane Ian on consumers' feelings about travel to the Paradise Coast. This is the 2nd wave of multiple waves of the survey to see how consumer sentiment changes over time.

● Research Methods

Online surveys with 550 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
- Wave 2: March 16-24, 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.






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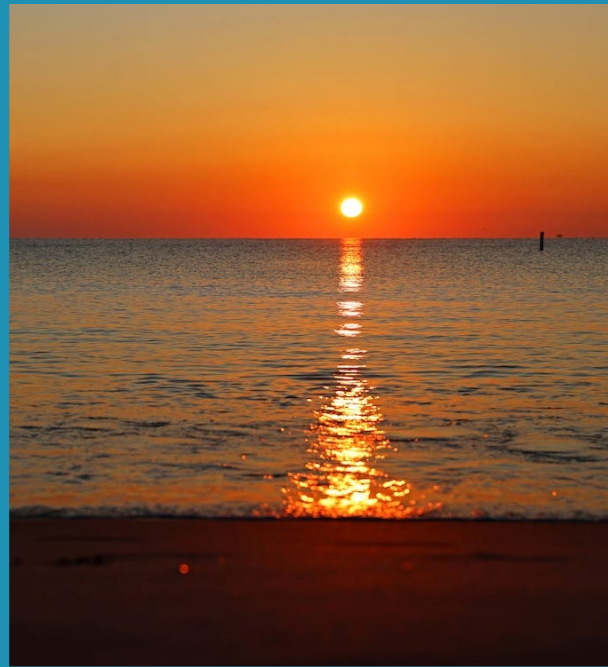
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Key Takeaways

Key Takeaways:

Nearly all hurricane-related metrics moved positively for Collier County from Wave 1 to Wave 2:

- More potential visitors plan on coming to Collier County (+4% points)
- More potential visitors would consider Collier County (+4% points)
- Fewer trip cancellations (-1% point)
- More potential visitors believe the area is ready for visitors (+3% points)
- More potential visitors believe the beaches and hotels are ready for visitors
- Higher percentage of positive responses on the current state of Collier County (+7% points)





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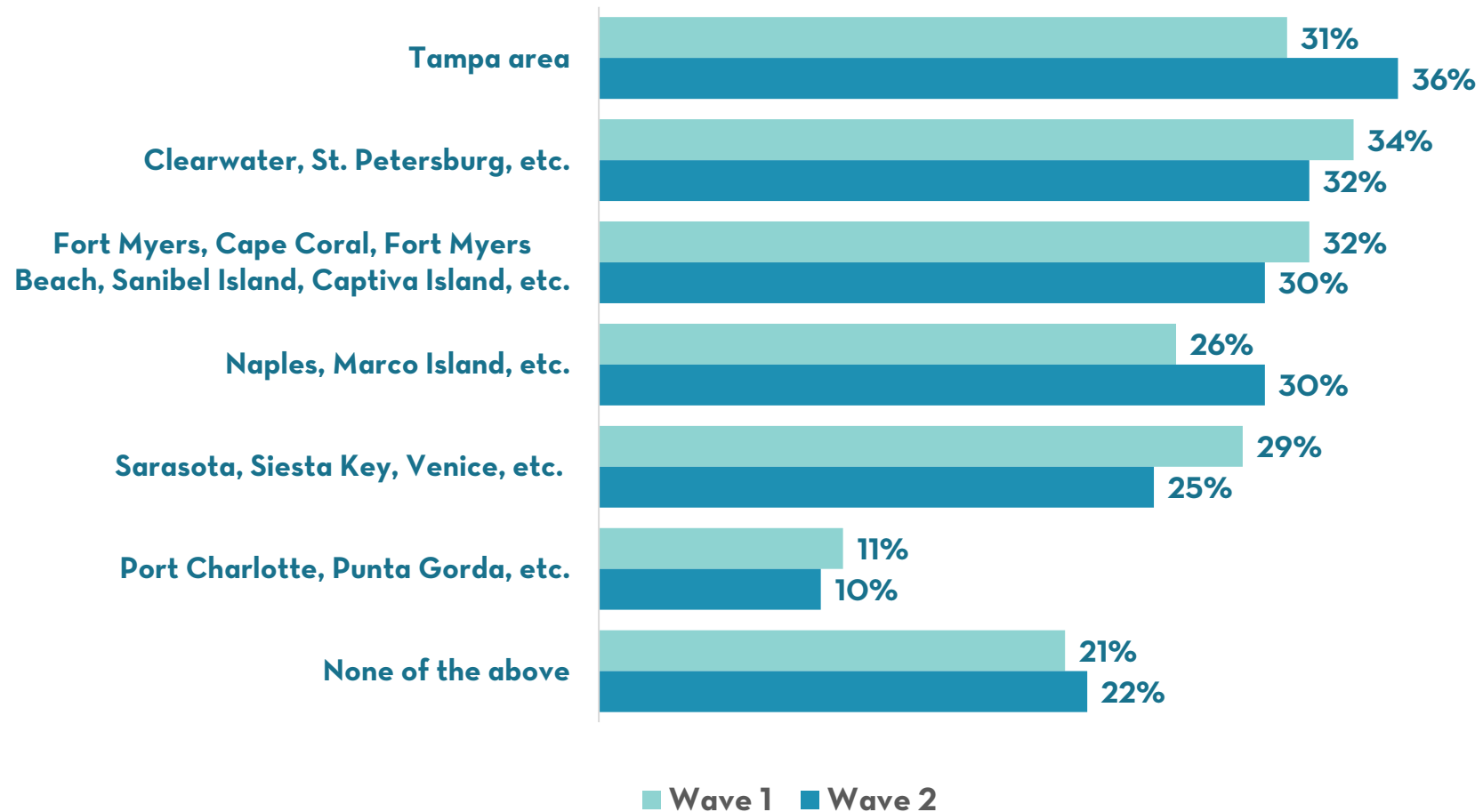
Detailed Findings



Visiting Florida in the coming year

3 in 10 consumers plan on visiting the Paradise Coast in the coming year

Visiting Florida in the coming year*



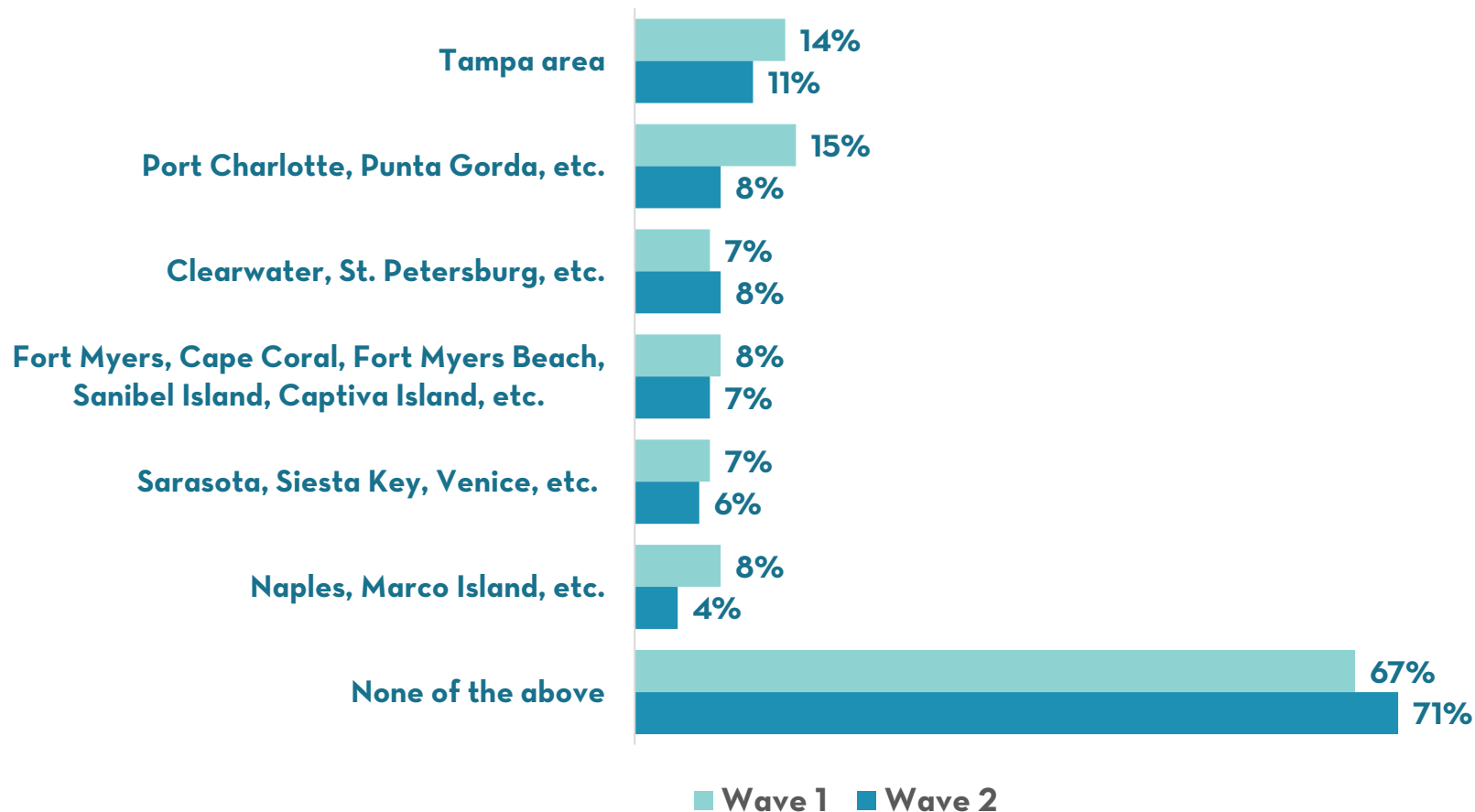
*Full Question: Do you plan to visit any of these areas in Florida in the coming year?
Multiple responses permitted.

Areas not considered for Florida Vacation

Only 4% of consumers stated that they would not consider the Paradise Coast during the planning phase of their trip

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

Areas not considered for Florida Vacation*



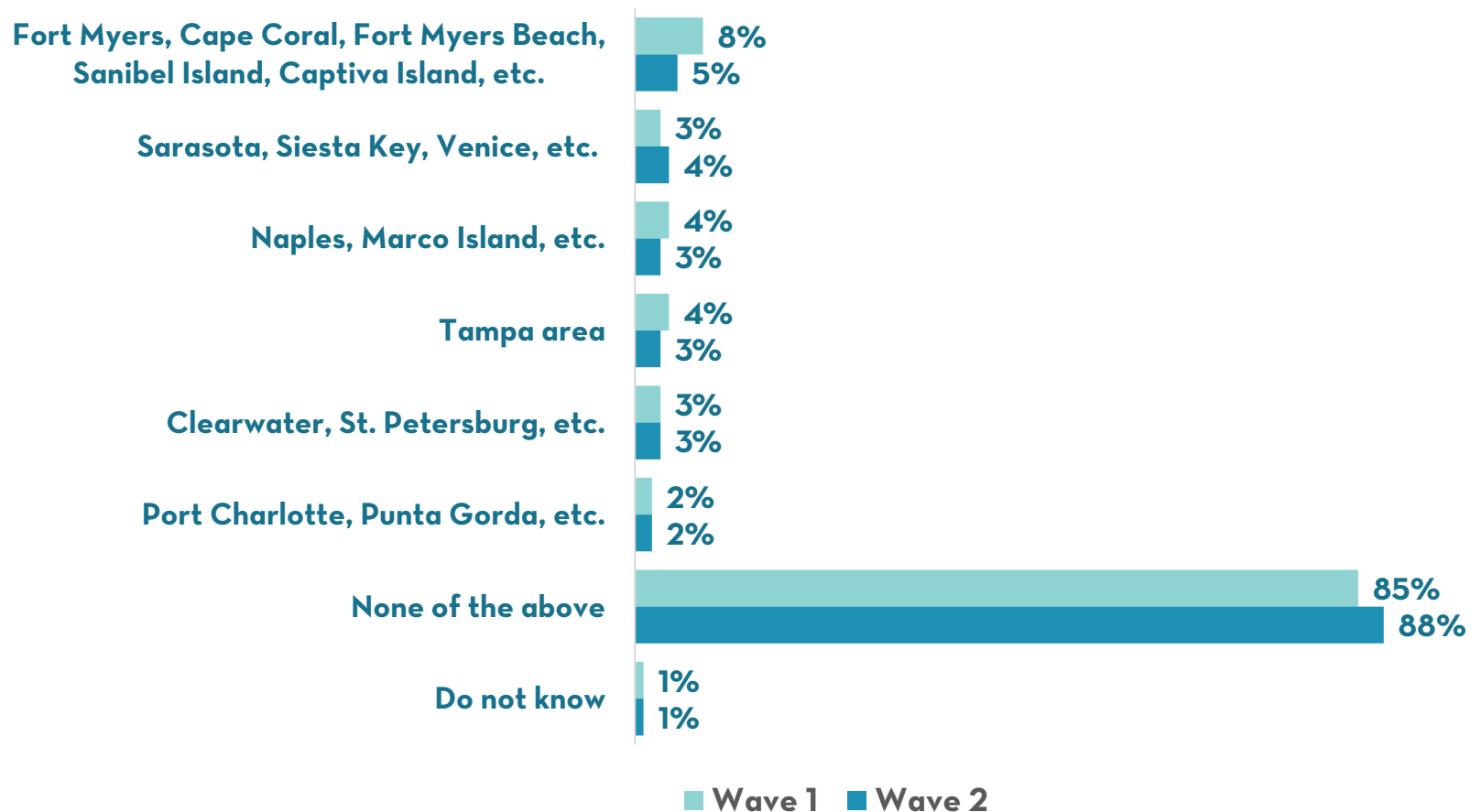
*Full Question: If you were to take a vacation in Florida, are there any of the following areas that you would NOT consider?
Multiple responses permitted.

Trip Cancellations

Only 3% of consumers stated that they had to cancel a trip to Paradise Coast during the past 6 months

1 in 6 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

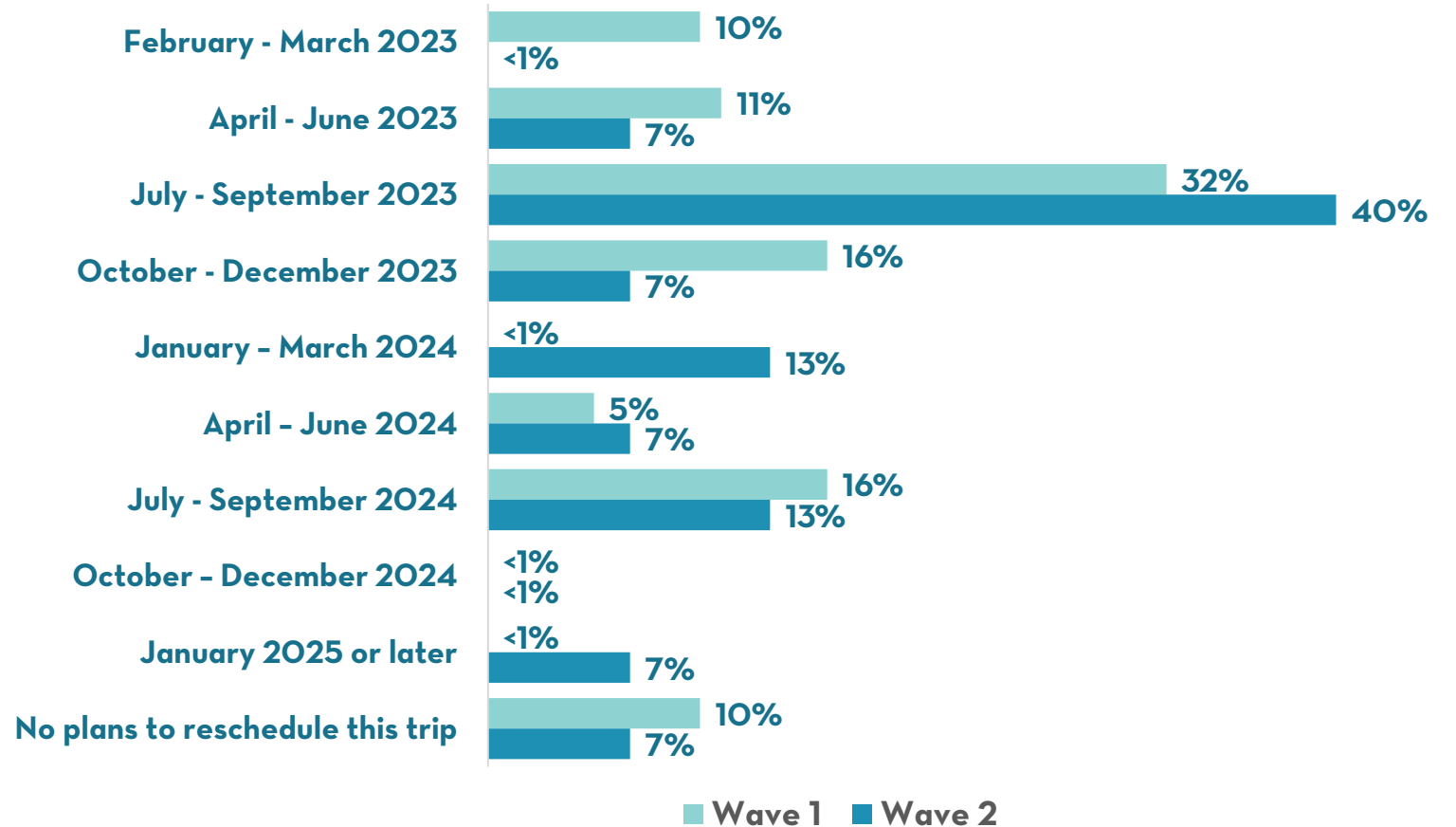
Over half of consumers stated that they plan to reschedule their trip for some time in 2023

Median date of rescheduling:

Wave 2: September 29th, 2023

Wave 1: September 7th, 2023

Trip Rescheduling To Return to Naples/Marco Island Area*

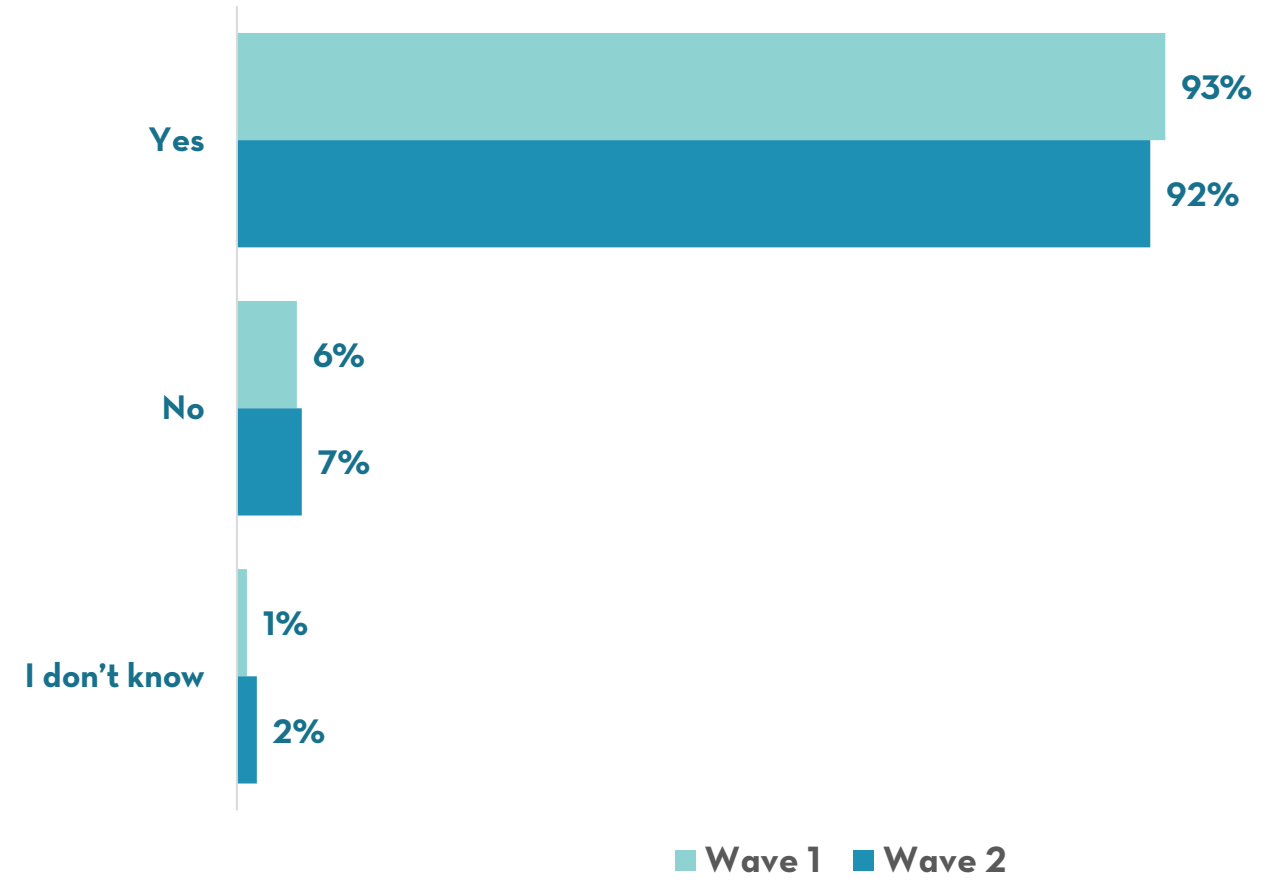


*Full Question: When do you plan to reschedule this trip to the Naples/Marco Island area?

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*



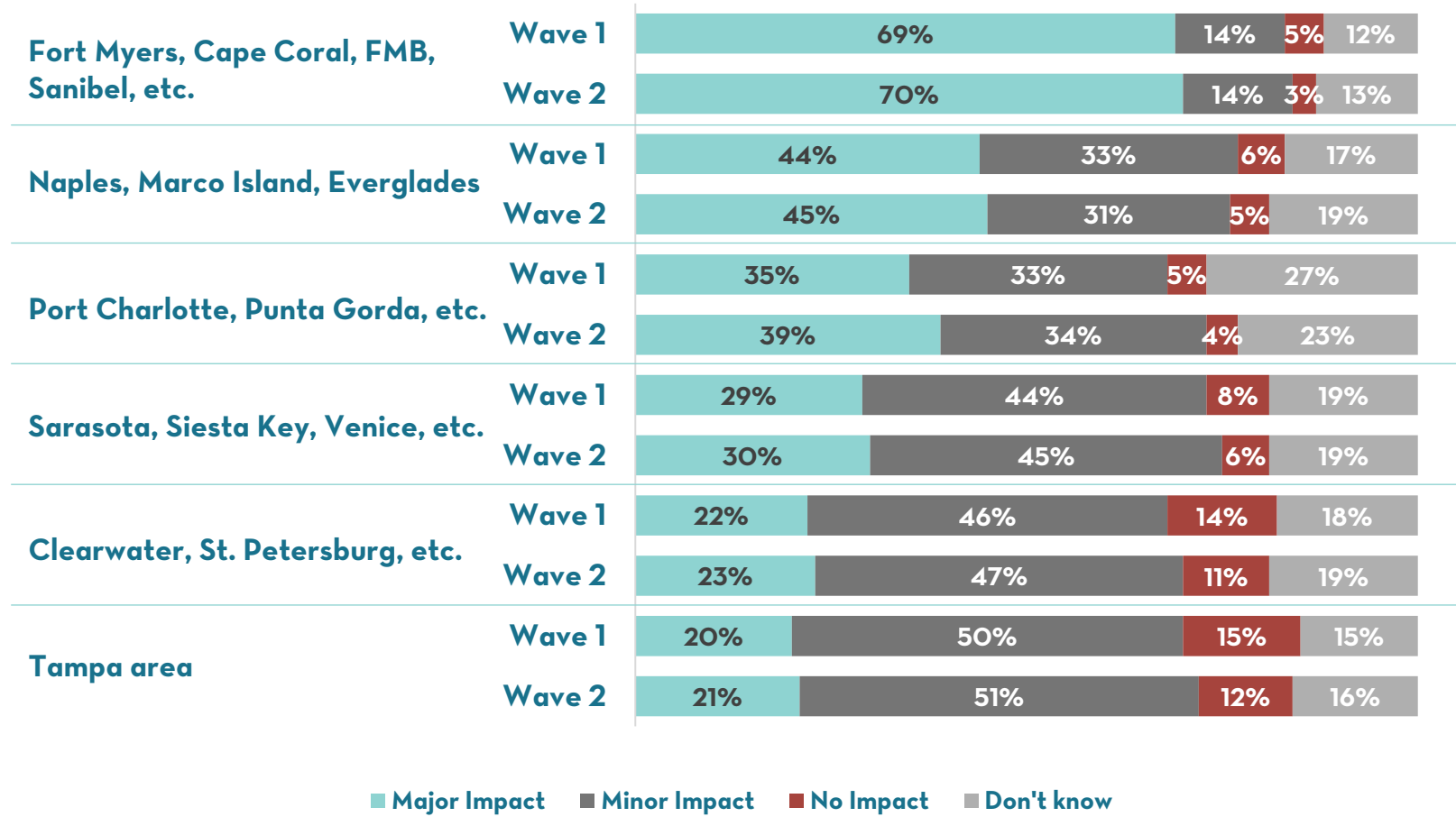
*Full Question: Do you recall seeing news about Hurricane Ian which made landfall in Florida in late September 2022?

Perceived impact of Hurricane Ian in Florida areas

Nearly half of 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*

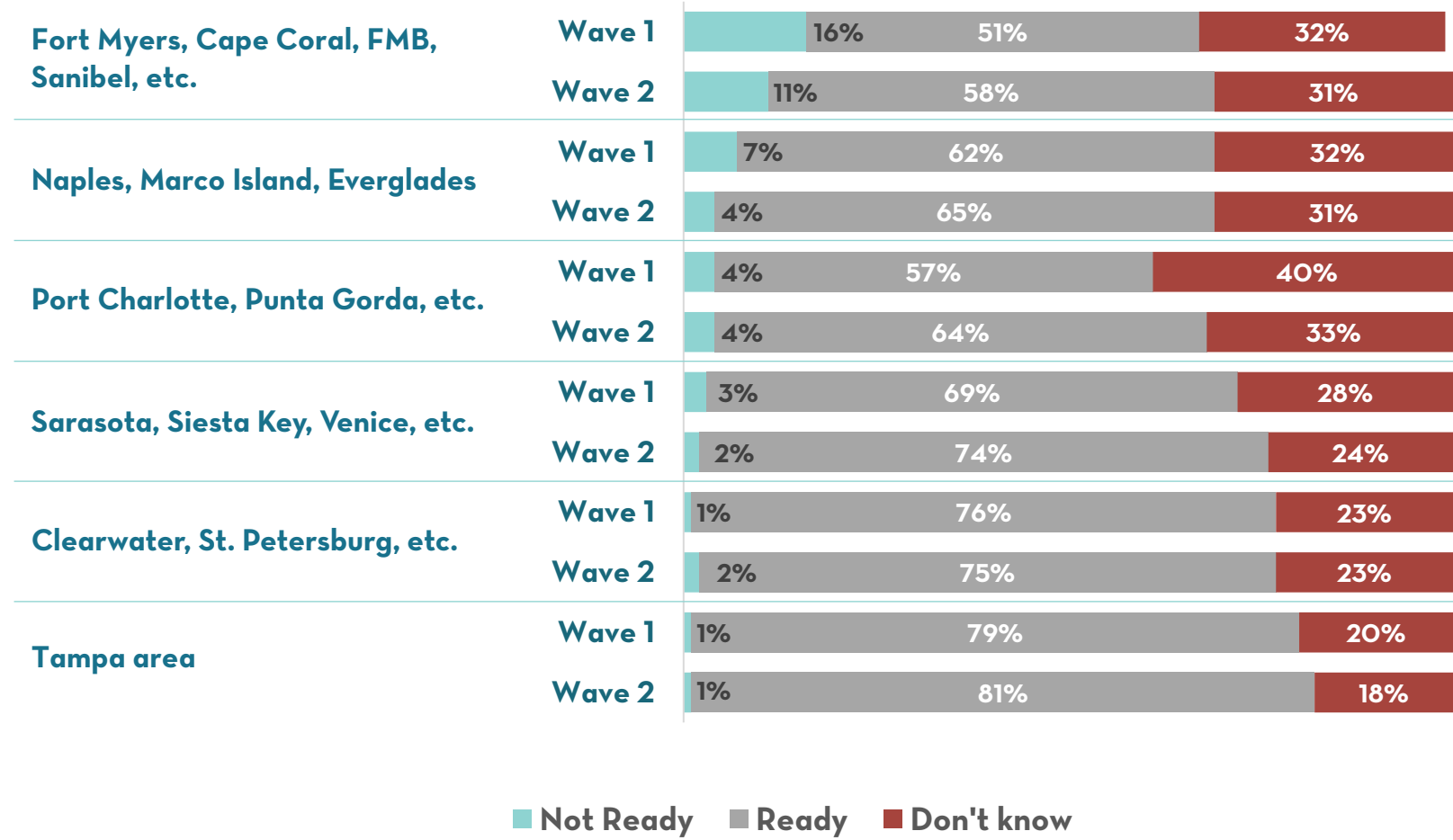


*Full Question: How significant was the impact of Hurricane Ian on the following areas?

Perceived readiness of each area to welcome visitors

Nearly 2 in 3 consumers think the Paradise Coast is ready to welcome visitors after Hurricane Ian

Perceived Readiness of Each Area

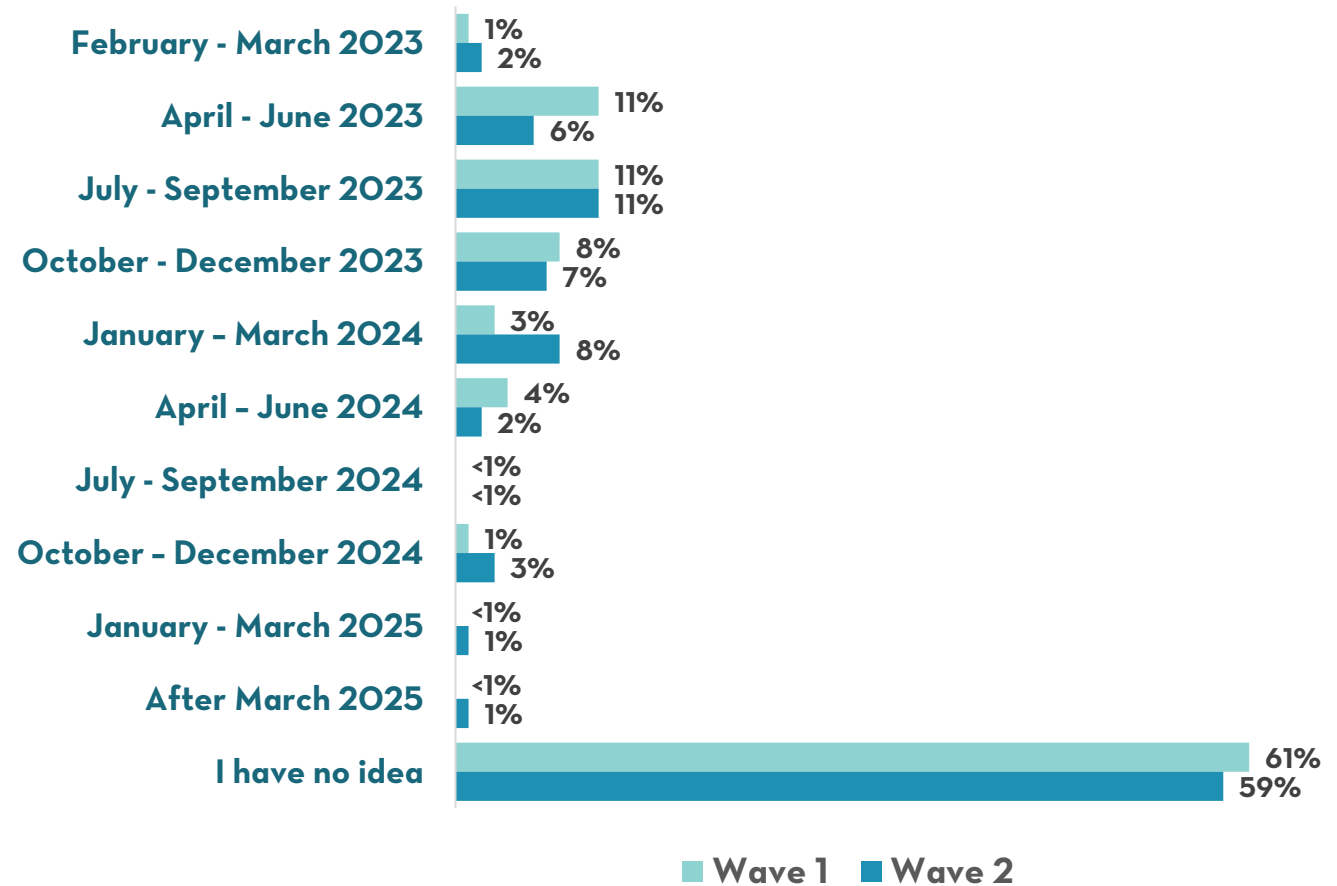


*Full Question: Which of the following geographic areas are ready to welcome visitors?

Perceived readiness timeline

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

Perceived readiness timeline*



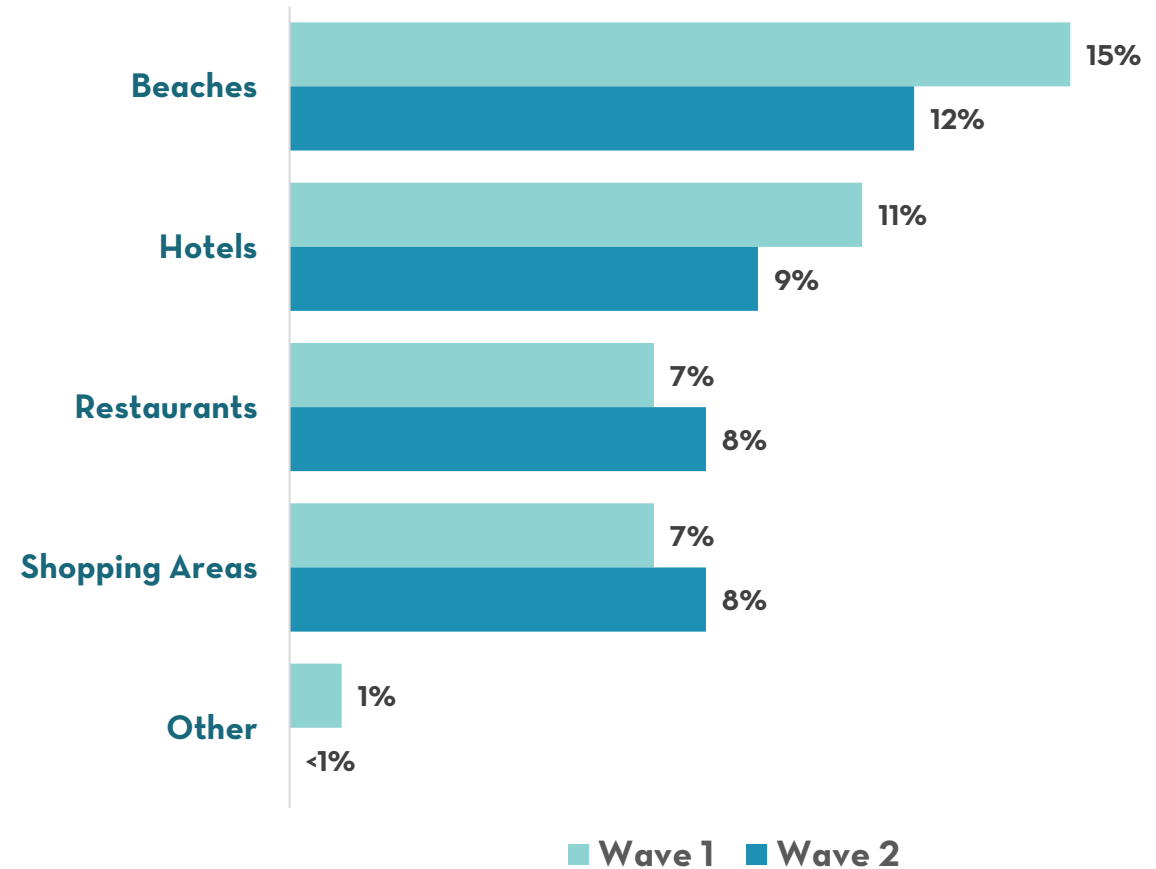
* Full Question: When will the Naples/Marco Island area be ready to welcome visitors?

Perceived readiness for attractions

Over 1 in 3 consumers said either that they believe the Paradise Coast is not ready to welcome back visitors or that they simply don't know if the area is ready to welcome back visitors yet.

Of those consumers, the beaches continue to be the largest concern.

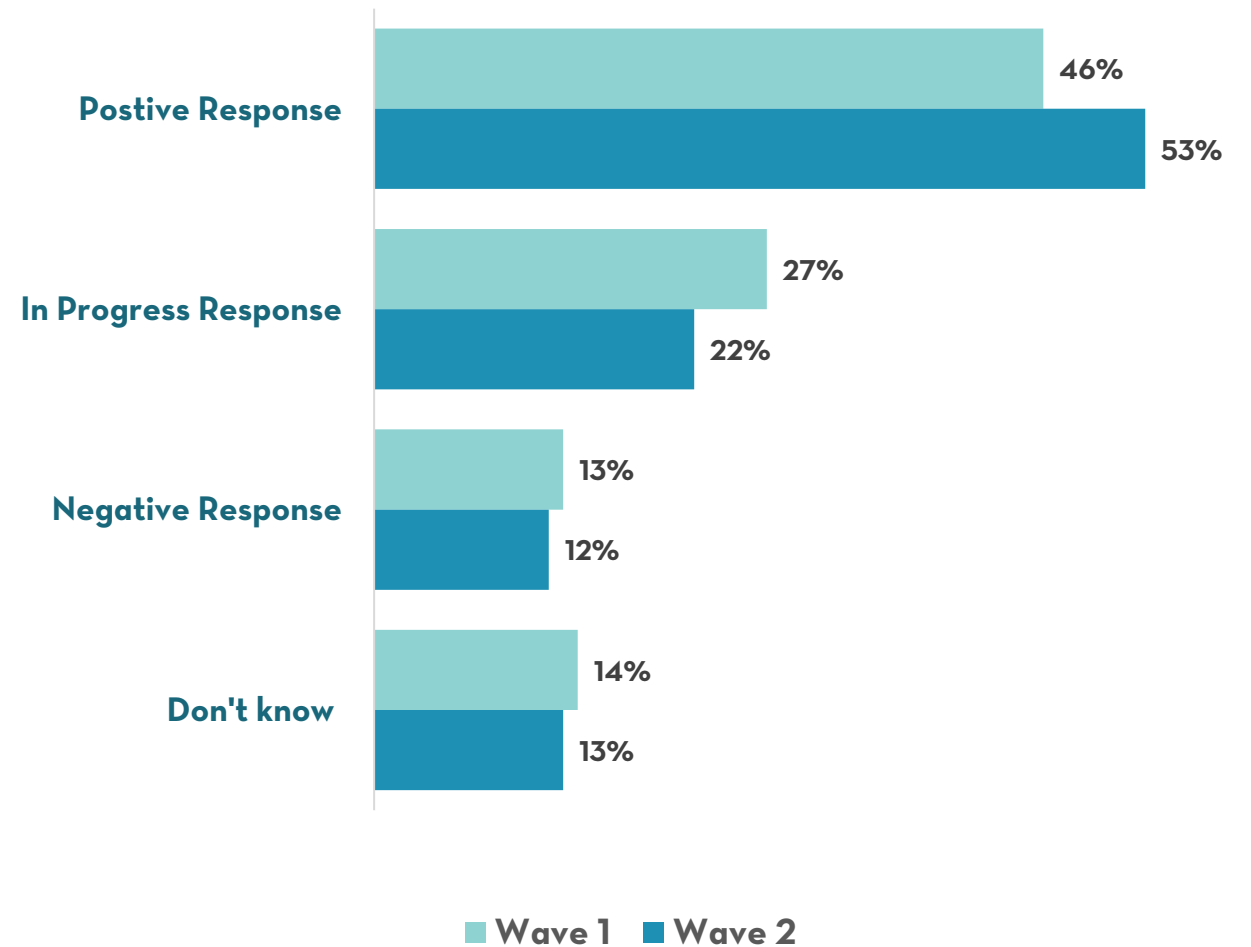
Areas of the Paradise Coast NOT Ready for Visitors*



Views on the current state of Naples

The share of consumers who view the current state of the Paradise Coast positively increased by 7% points in comparison to Wave 1.

Views on the current state of Naples*



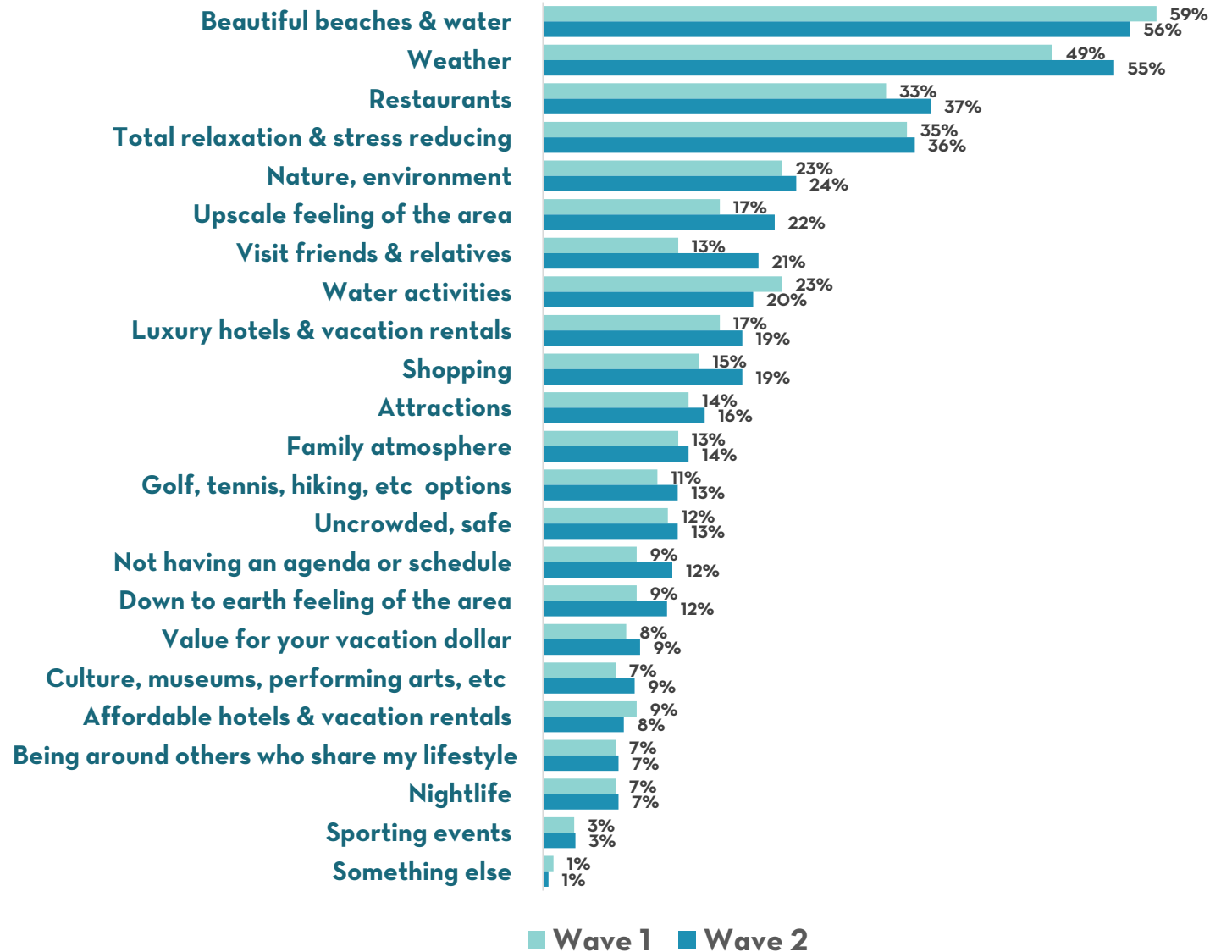
*Full Question: What one word or phrase best describes the current state of the Naples area?

Coded open-ended responses

Best Reasons to visit

Beautiful beaches & water, along with weather, were still considered the two best reasons to visit the Paradise Coast.

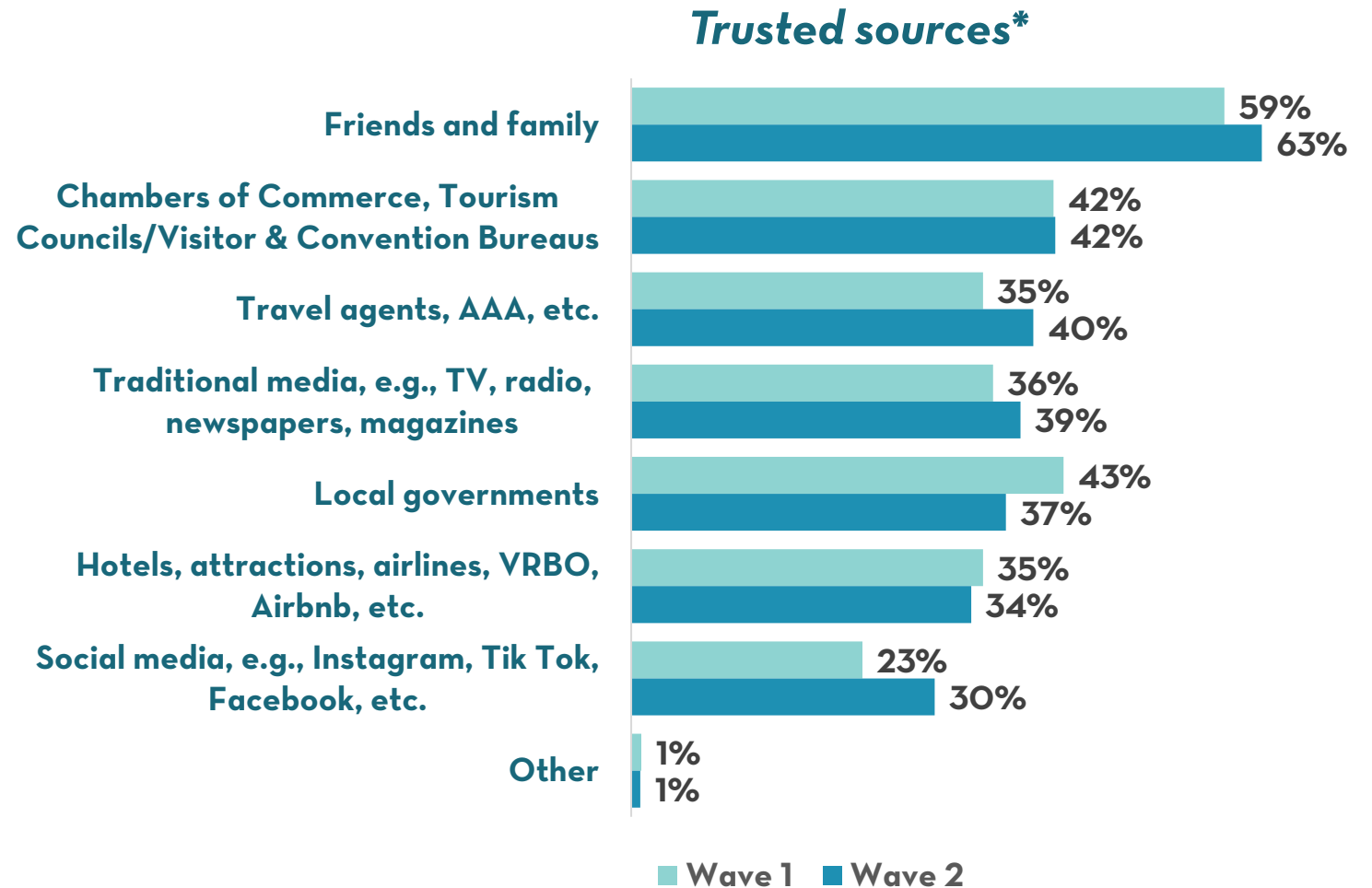
Best Reasons to visit*



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

Trusted sources

Friends and family were still considered 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.



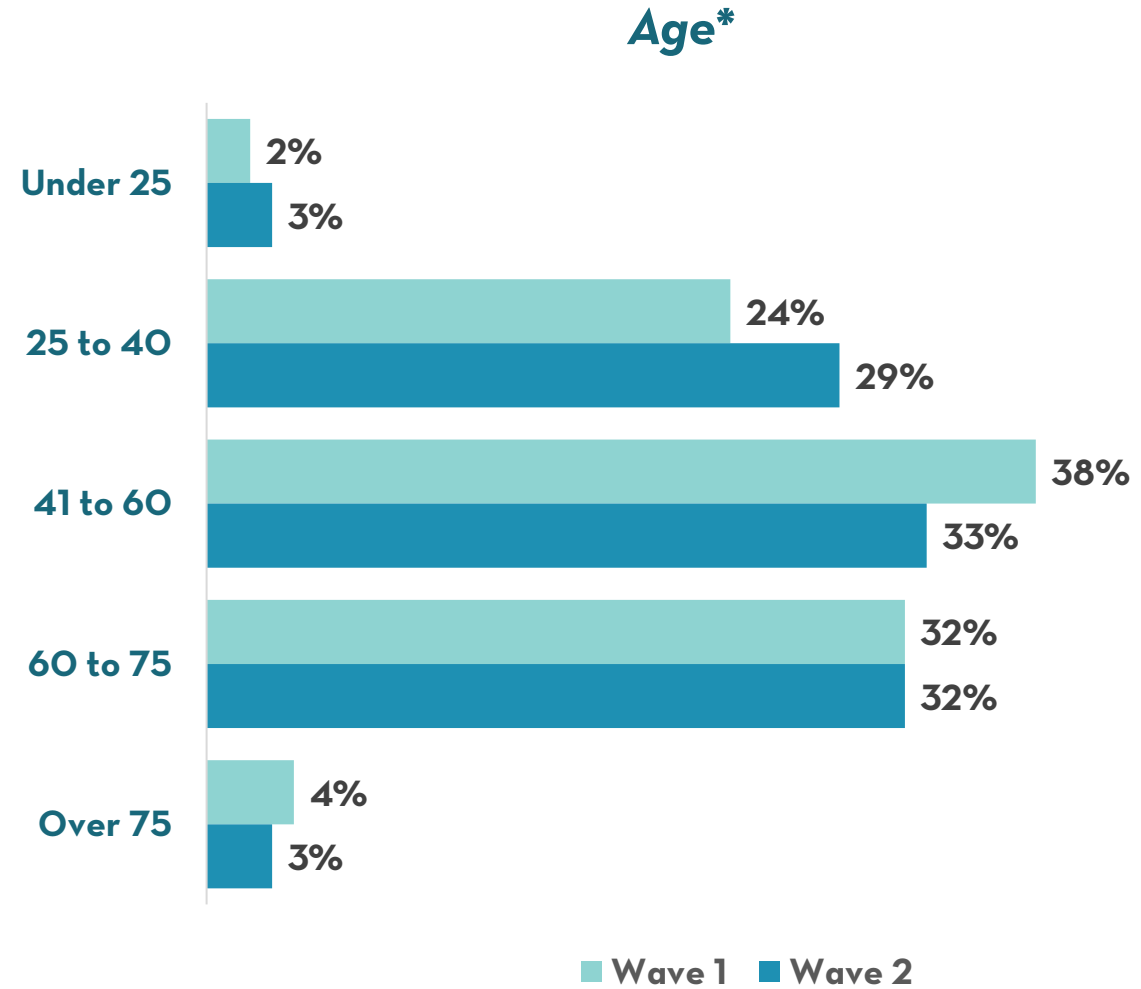
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Consumer Profile

Age

The median age was 51 years old.
(Previous wave: 54 years old)

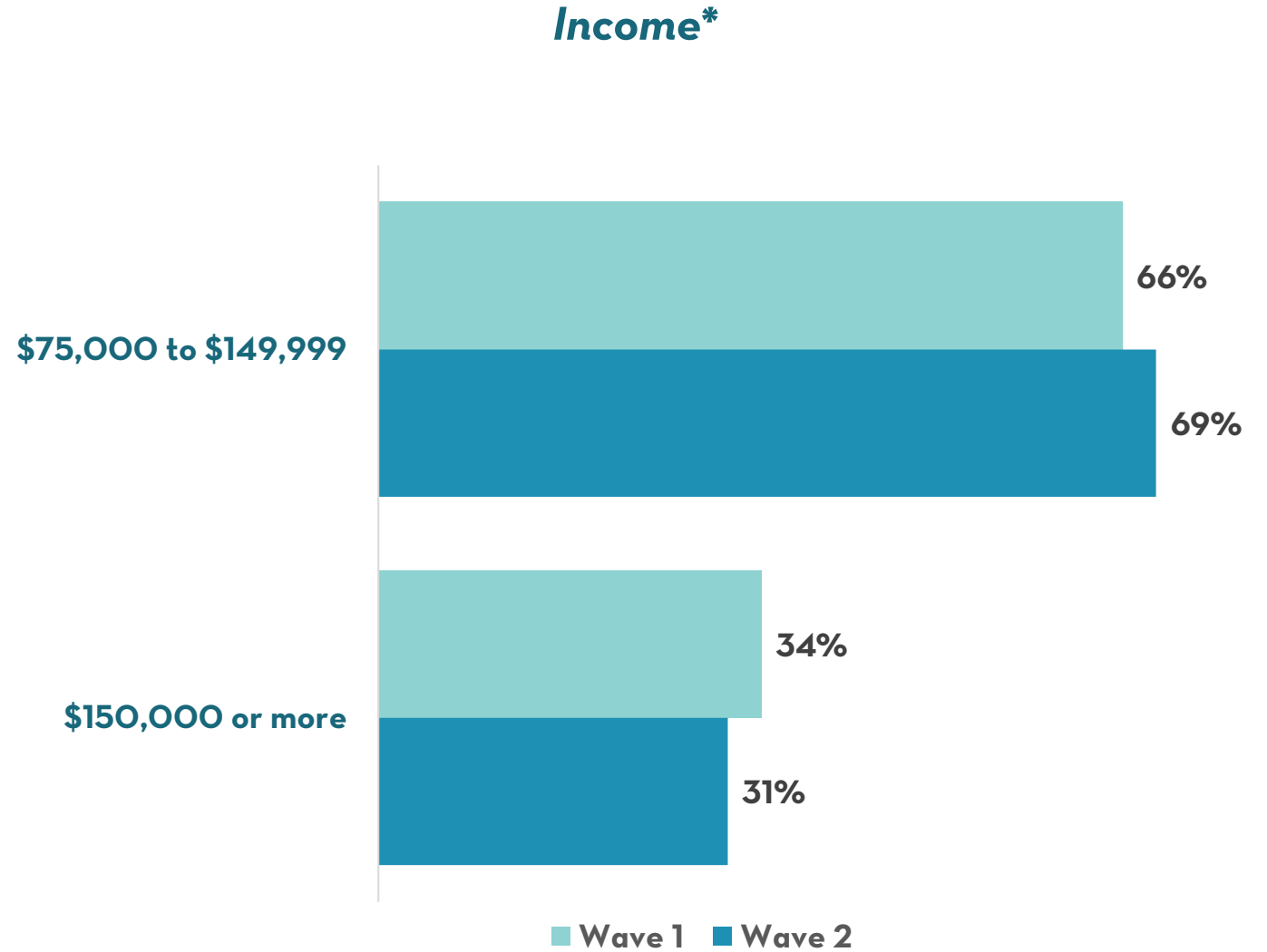


*Full Question: How old were you on your last birthday?

Income

The median income was **\$127,000.**

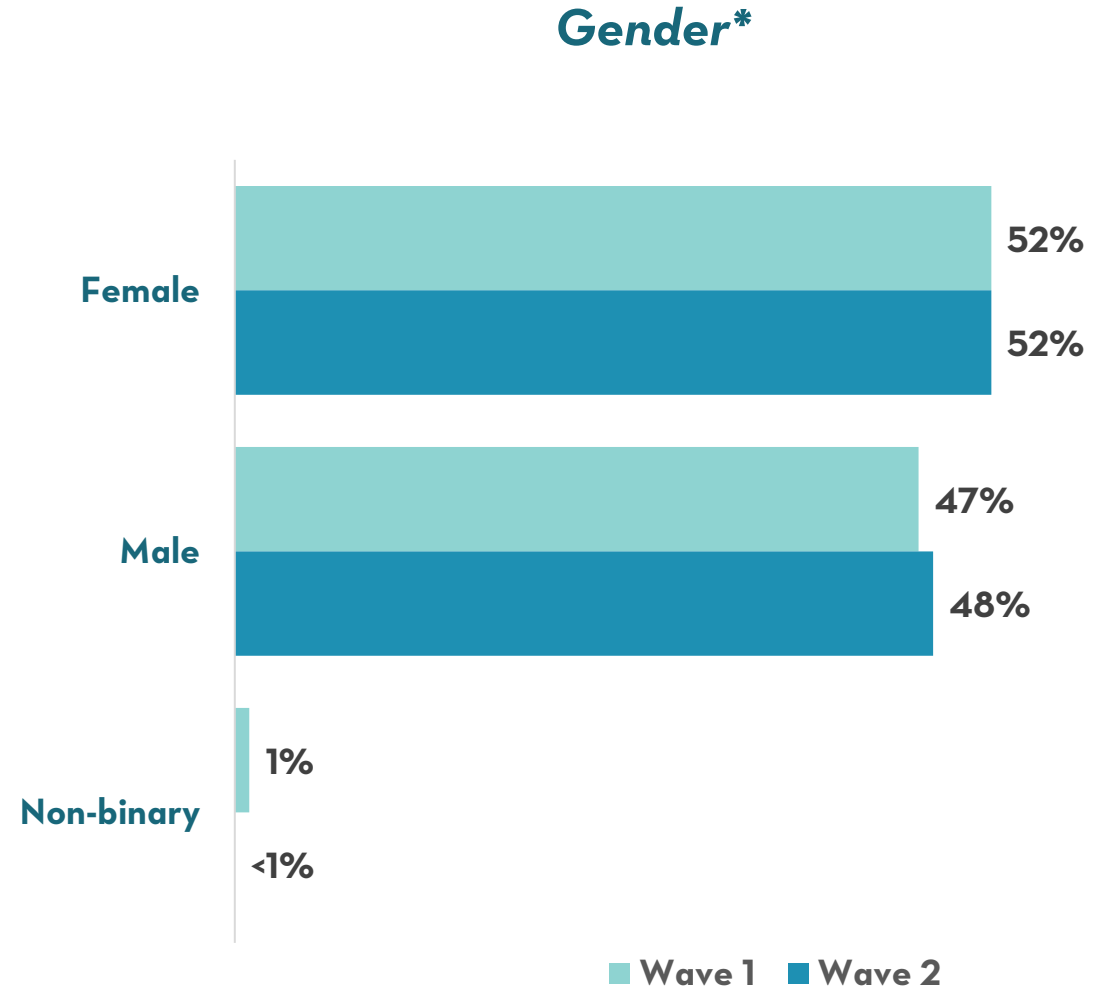
(Previous wave: \$126,500)



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

Gender

Consumers were still slightly more likely to be female than male



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



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