# NAPLES MARCO ISLAND EVERGLADES℠

## FLORIDA'S PARADISE COAST

**Hurricane Sentiment Study**

May 2023

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Introduction

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# Study Purpose & Research Methods

● **Study Purpose**

Determine the impact of Hurricane Ian on consumers' feelings about travel to the Paradise Coast. This is the 3rd 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: 2/9/23 – 2/20/23
- Wave 2: 3/16/23 – 3/24/23
- Wave 3: 4/25/23 - 5/4/23

Consumers were adults age 21+ who earn at least $75,000 per year in household income, serve 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.
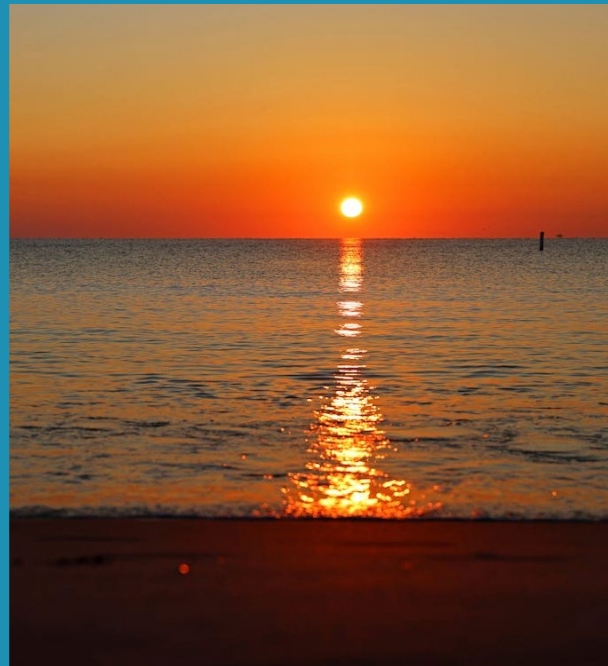
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# *Key Takeaways:*

The hurricane is largely an after thought for consumers when it comes to visiting the Paradise Coast:

- <1% of consumers would not visit the Paradise Coast due to the hurricane

- 1% of consumers cancelled a trip to the Paradise Coast due to the hurricane

- 6% of consumers believe that the Paradise Coast is not ready to welcome visitors

- Beaches are still the largest area of concern among consumers, but the concern has lessened each wave of the study

- Positive open-ended responses have increased each wave regarding the perceived current state of the Paradise Coast
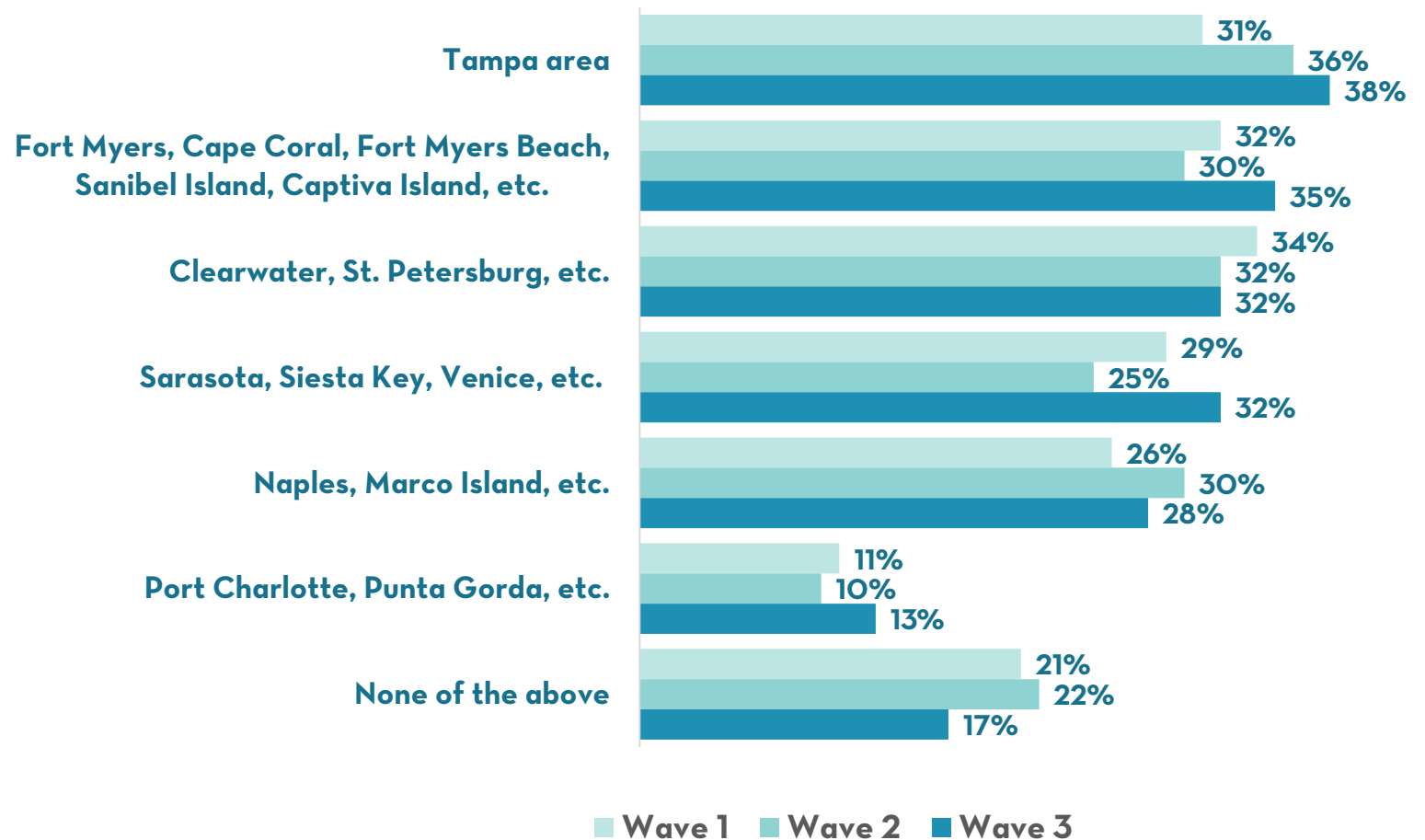
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Detailed Findings

# Areas not considered for Florida Vacation

**Only 7% of consumers stated that they would not consider the Paradise Coast during the planning phase of their trip**

**Less than 1% of all potential visitors said they would not consider the Paradise Coast due to hurricane related reasons**

**The most common reason among potential visitors who said they wouldn't consider the area is that the area is "too expensive"**

## Areas not considered for Florida Vacation*

| Area | Wave 1 | Wave 2 | Wave 3 |
|---|---|---|---|
| Tampa area | 14% | 11% | 10% |
| Port Charlotte, Punta Gorda, etc. | 15% | 8% | 10% |
| Fort Myers, Cape Coral, Fort Myers Beach, Sanibel Island, Captiva Island, etc. | 8% | 7% | 7% |
| Naples, Marco Island, etc. | 8% | 4% | 7% |
| Clearwater, St. Petersburg, etc. | 7% | 8% | 6% |
| Sarasota, Siesta Key, Venice, etc. | 7% | 6% | 4% |
| None of the above | 67% | 71% | 71% |

■ Wave 1　■ Wave 2　■ Wave 3
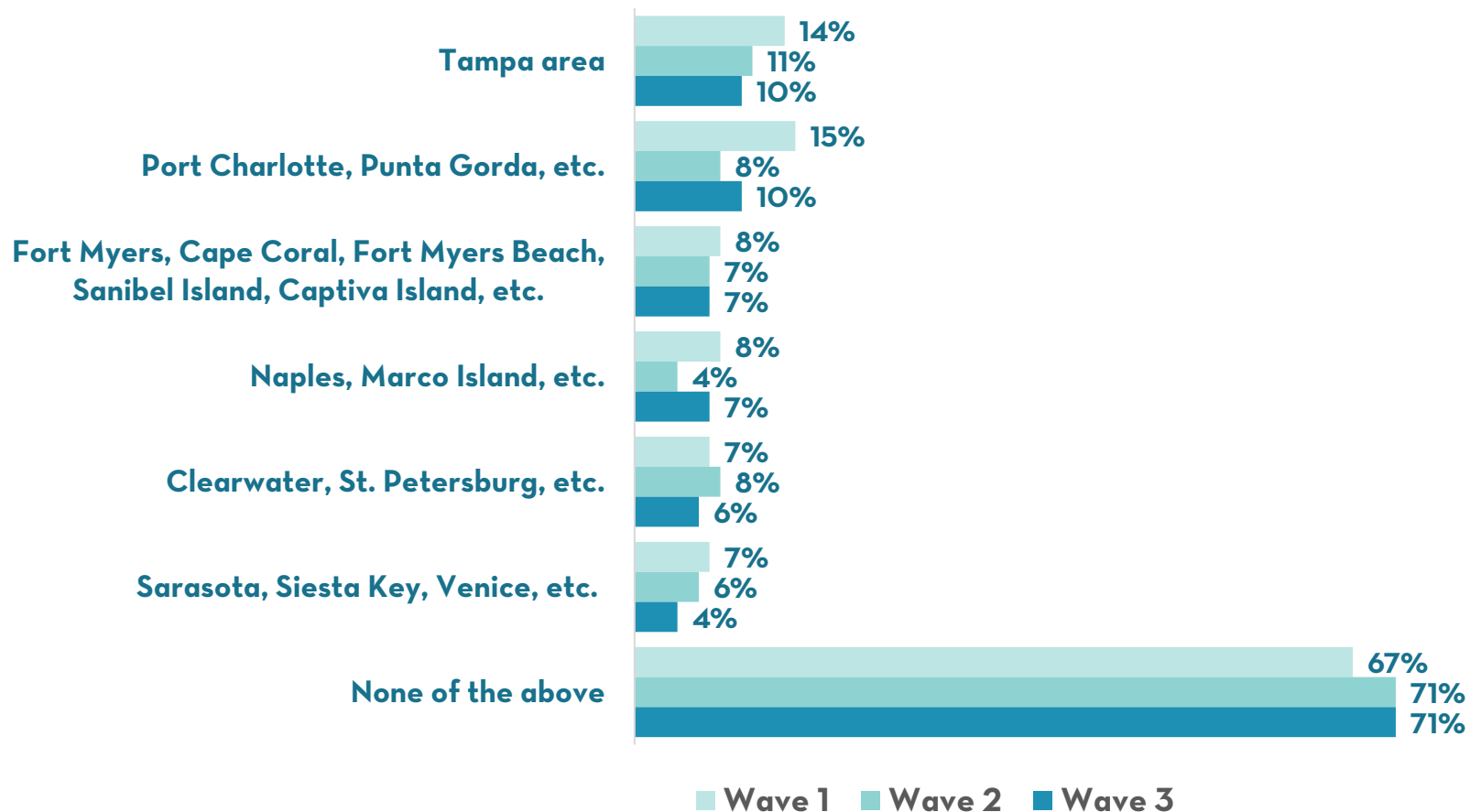
*Full Question: If you were to take a vacation in Florida, are there any of the following areas that you would NOT consider?
Multiple responses permitted.

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# Trip Cancellations

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

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

### Trip Cancellations*



Fort Myers, Cape Coral, Fort Myers Beach, Sanibel Island, Captiva Island, etc.
- 8%
- 5%
- 5%

Sarasota, Siesta Key, Venice, etc.
- 3%
- 4%
- 5%

Tampa area
- 4%
- 3%
- 4%

Clearwater, St. Petersburg, etc.
- 3%
- 3%
- 4%

Naples, Marco Island, etc.
- 4%
- 3%
- 3%

Port Charlotte, Punta Gorda, etc.
- 2%
- 2%
- 3%

None of the above
- 85%
- 88%
- 86%

■ Wave 1 ■ Wave 2 ■ Wave 3
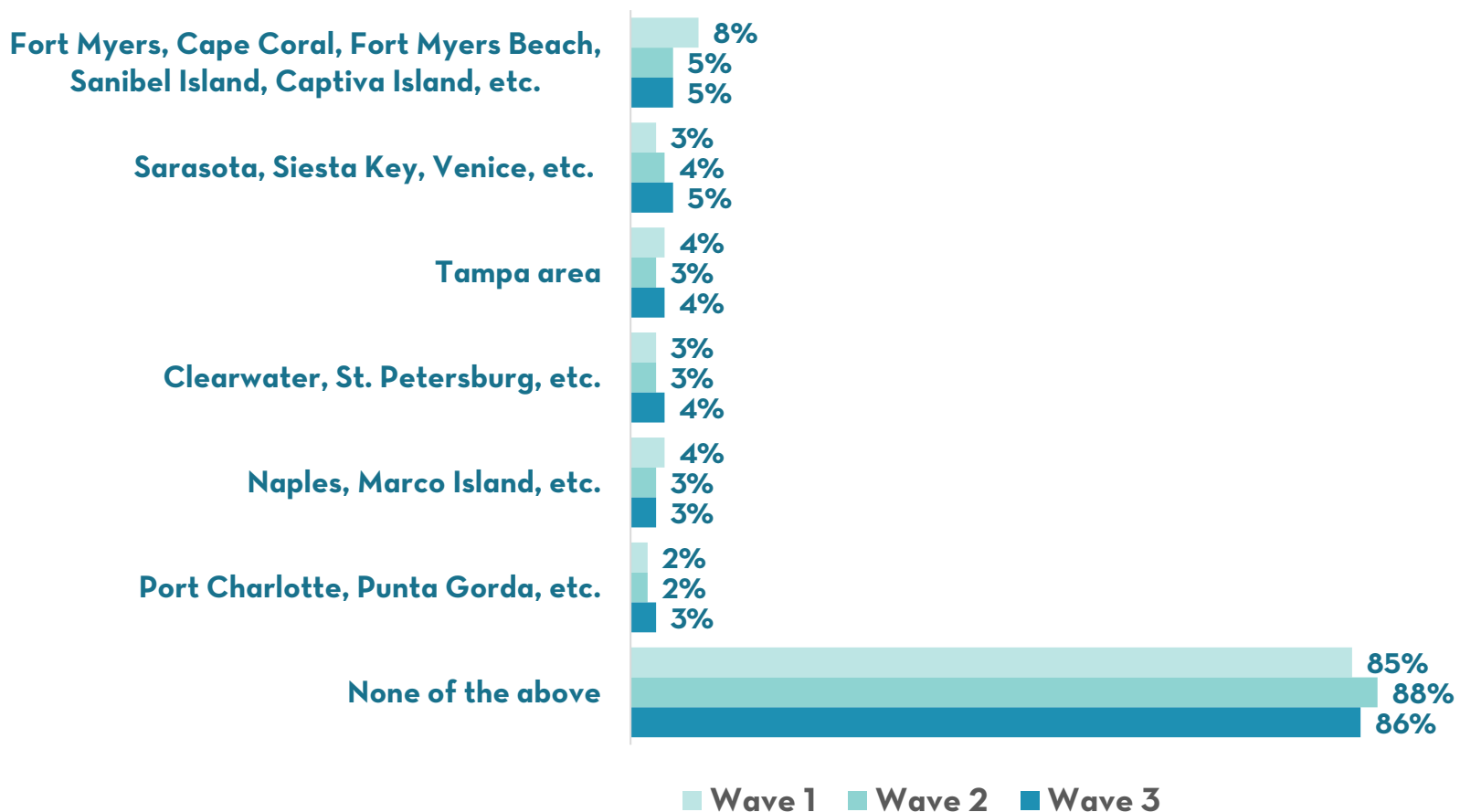
*Full Question: Did you cancel any vacations to any of the following areas in the past six months?
Multiple responses permitted.

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# Trip Rescheduling To Return to Naples/Marco Island Area

**More than half of Wave 3 respondents who had cancelled a trip to the Naples area stated that they plan to reschedule their trip for some time in 2024**

**Median date of rescheduling:**

**Wave 3: January 5th, 2024**

**Wave 2: September 29th, 2023**

**Wave 1: September 7th, 2023**

## Trip Rescheduling To Return to Naples/Marco Island Area[1,2]

| Period | Wave 1 | Wave 2 | Wave 3 |
|---|---|---|---|
| February - March 2023 | 10% | <1% | <1% |
| April - June 2023 | 11% | 7% | 6% |
| July - September 2023 | 32% | 40% | 19% |
| October - December 2023 | 16% | 7% | 19% |
| January – March 2024 | <1% | 13% | 31% |
| April – June 2024 | 5% | 7% | 6% |
| July - September 2024 | 16% | 13% | 13% |
| October – December 2024 | <1% | <1% | 6% |
| January 2025 or later | <1% | 7% | <1% |
| No plans to reschedule this trip | 10% | 7% | <1% |

Wave 1   Wave 2   Wave 3

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[1]Full Question: When do you plan to reschedule this trip to the Naples/Marco Island area?
[2]Small sample size: Please interpret results with caution.

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# *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**



**Yes** — 93% (Wave 1), 92% (Wave 2), 93% (Wave 3)

**No** — 6% (Wave 1), 7% (Wave 2), 5% (Wave 3)

**I don't know** — 1% (Wave 1), 2% (Wave 2), 2% (Wave 3)

Wave 1 ■ Wave 2 ■ Wave 3
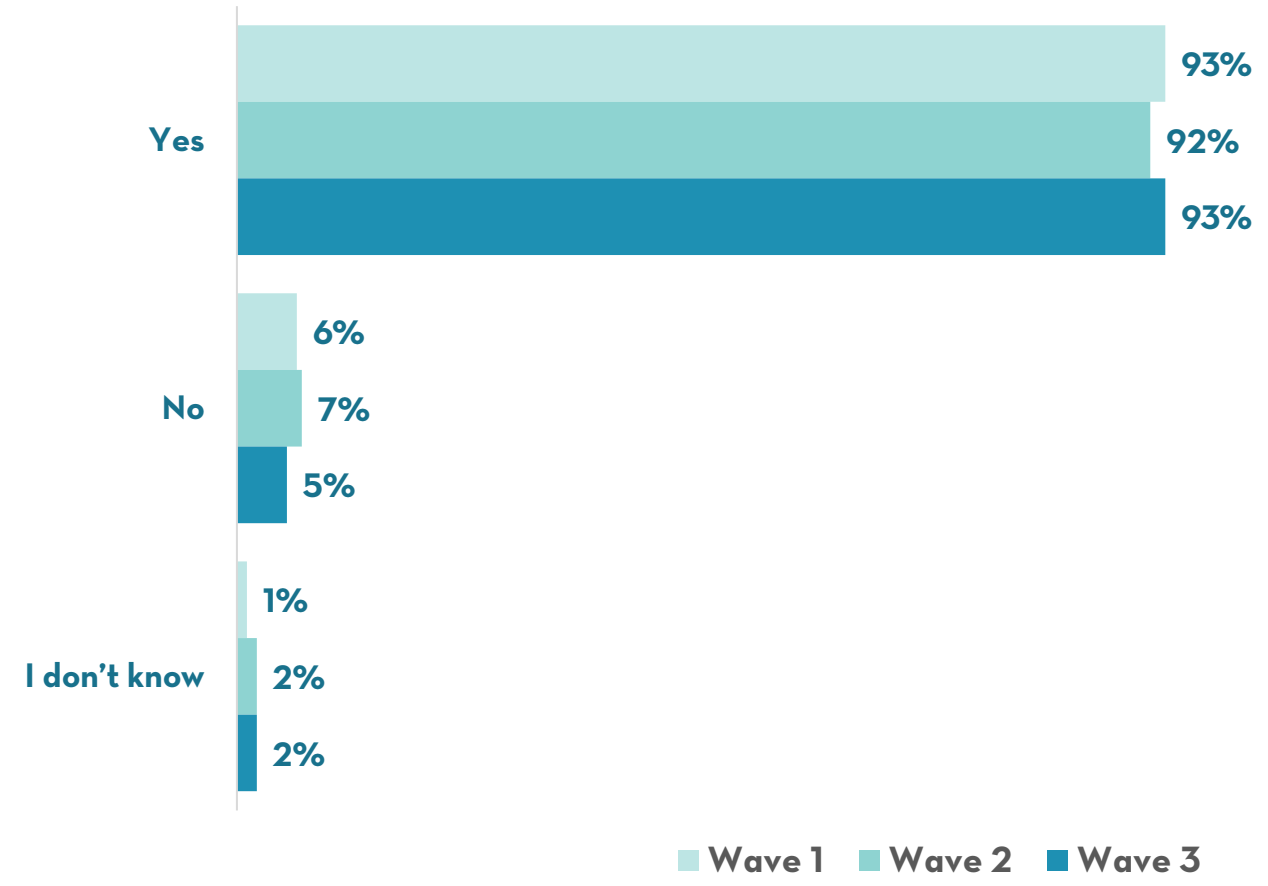
*Full Question: Do you recall seeing news about Hurricane Ian which made landfall in Florida in late September 2022?

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# Perceived impact of Hurricane Ian in Florida areas

**Over 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*

| Area | Wave | Major Impact | Minor Impact | No Impact | Don't know |
|------|------|--------------|--------------|-----------|------------|
| Fort Myers, Cape Coral, FMB, Sanibel, etc. | Wave 1 | 69% | 14% | 5% | 12% |
| | Wave 2 | 70% | 14% | 3% | 13% |
| | Wave 3 | 65% | 18% | 2% | 15% |
| Naples, Marco Island, Everglades | Wave 1 | 44% | 33% | 6% | 17% |
| | Wave 2 | 45% | 31% | 5% | 19% |
| | Wave 3 | 42% | 36% | 4% | 18% |
| Port Charlotte, Punta Gorda, etc. | Wave 1 | 35% | 33% | 5% | 27% |
| | Wave 2 | 39% | 34% | 4% | 23% |
| | Wave 3 | 34% | 34% | 5% | 27% |
| Sarasota, Siesta Key, Venice, etc. | Wave 1 | 29% | 44% | 8% | 19% |
| | Wave 2 | 30% | 45% | 6% | 19% |
| | Wave 3 | 26% | 45% | 7% | 22% |
| Clearwater, St. Petersburg, etc. | Wave 1 | 22% | 46% | 14% | 18% |
| | Wave 2 | 23% | 47% | 11% | 19% |
| | Wave 3 | 24% | 44% | 11% | 21% |
| Tampa area | Wave 1 | 20% | 50% | 15% | 15% |
| | Wave 2 | 21% | 51% | 12% | 16% |
| | Wave 3 | 22% | 47% | 13% | 18% |

Legend: ■ Major Impact   ■ Minor Impact   ■ No Impact   ■ Don't know

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

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# Perceived readiness of each area to welcome visitors

**Less than 1 in 10 consumers believe that the Paradise Coast is not ready to welcome visitors yet**

## Perceived Readiness of Each Area

| Area | Wave | Not Ready | Ready | Don't know |
|------|------|-----------|-------|------------|
| Fort Myers, Cape Coral, FMB, Sanibel, etc. | Wave 1 | 17% | 51% | 32% |
| | Wave 2 | 11% | 58% | 31% |
| | Wave 3 | 12% | 62% | 26% |
| Naples, Marco Island, Everglades | Wave 1 | 7% | 62% | 31% |
| | Wave 2 | 4% | 65% | 31% |
| | Wave 3 | 6% | 73% | 21% |
| Port Charlotte, Punta Gorda, etc. | Wave 1 | 4% | 56% | 40% |
| | Wave 2 | 4% | 64% | 32% |
| | Wave 3 | 7% | 68% | 25% |
| Sarasota, Siesta Key, Venice, etc. | Wave 1 | 3% | 69% | 28% |
| | Wave 2 | 2% | 74% | 24% |
| | Wave 3 | 4% | 81% | 15% |
| Clearwater, St. Petersburg, etc. | Wave 1 | 1% | 76% | 23% |
| | Wave 2 | 2% | 75% | 23% |
| | Wave 3 | 5% | 80% | 15% |
| Tampa area | Wave 1 | 1% | 79% | 20% |
| | Wave 2 | 1% | 81% | 18% |
| | Wave 3 | 6% | 82% | 12% |

■ **Not Ready**  ■ **Ready**  ■ **Don't know**

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

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# 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[1,2]



| Period | Wave 1 | Wave 2 | Wave 3 |
|---|---|---|---|
| February - March 2023 | 1% | 2% | <1% |
| April - June 2023 | 11% | 6% | 7% |
| July - September 2023 | 11% | 11% | 7% |
| October - December 2023 | 8% | 7% | 3% |
| January – March 2024 | 3% | 8% | 8% |
| April – June 2024 | 4% | 2% | 2% |
| July - September 2024 | <1% | <1% | 7% |
| October – December 2024 | 1% | 3% | 2% |
| January - March 2025 | <1% | 1% | 7% |
| After March 2025 | <1% | 1% | <1% |
| I have no idea | 61% | 59% | 58% |

■ Wave 1  ■ Wave 2  ■ Wave 3
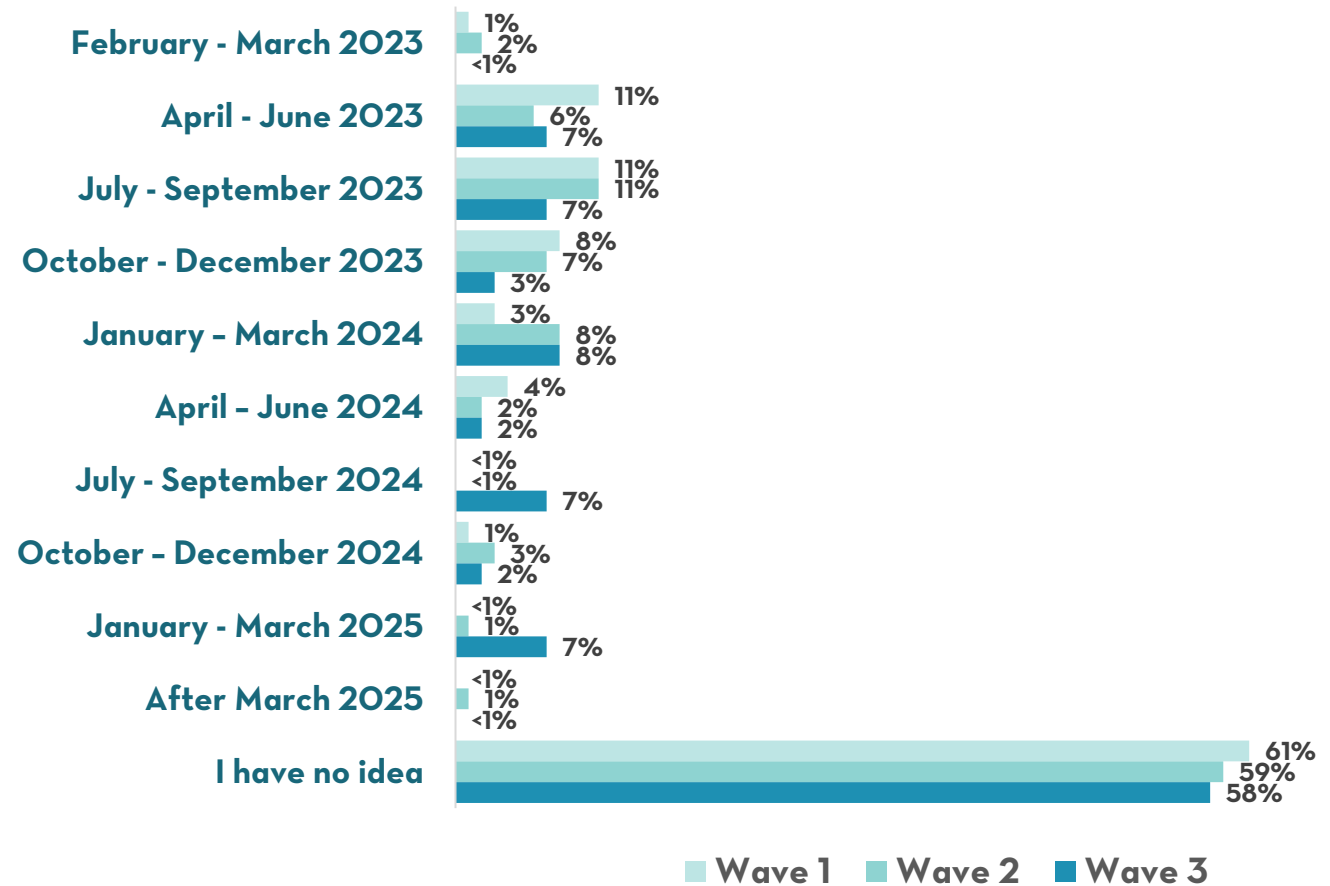
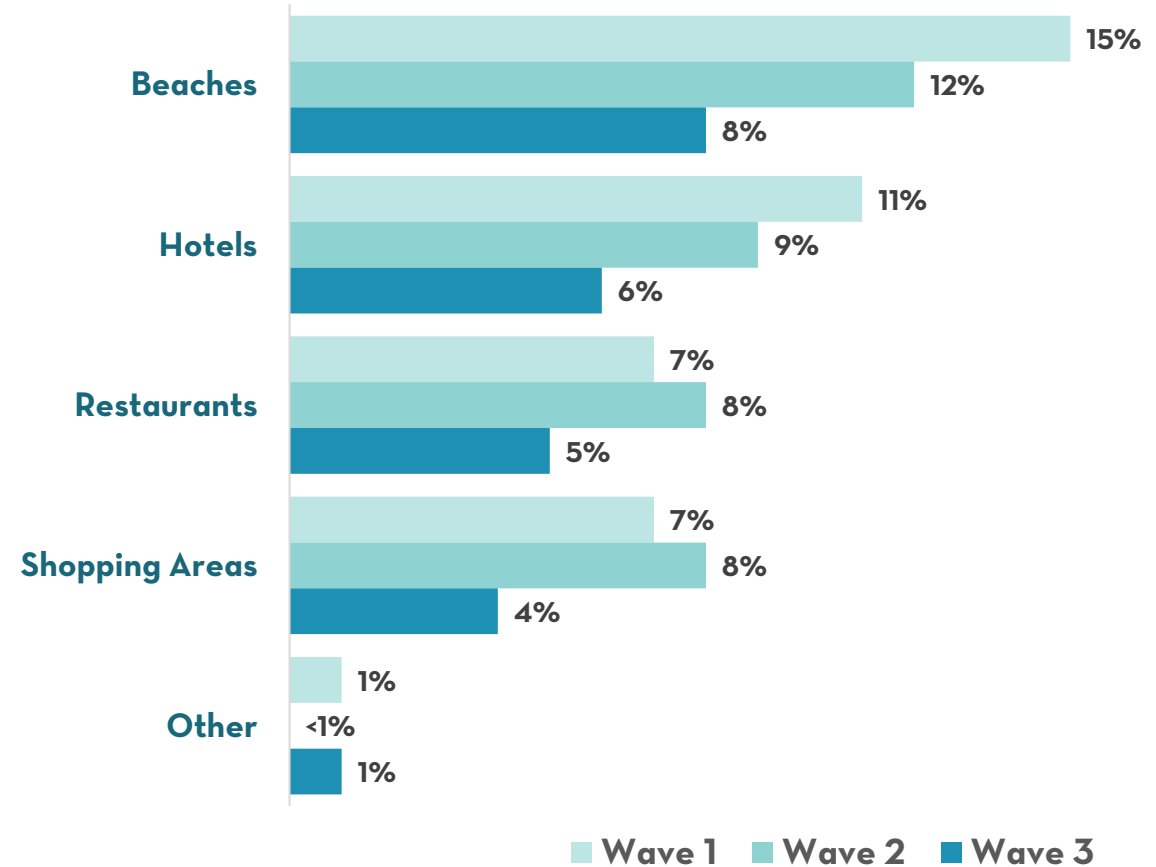[1]Full Question: When will the Naples/Marco Island area be ready to welcome visitors?
[2]Small sample size: Please interpret results with caution.

# Perceived readiness for attractions

**Over 1 in 4 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*



Beaches — Wave 1: 15%, Wave 2: 12%, Wave 3: 8%
Hotels — Wave 1: 11%, Wave 2: 9%, Wave 3: 6%
Restaurants — Wave 1: 7%, Wave 2: 8%, Wave 3: 5%
Shopping Areas — Wave 1: 7%, Wave 2: 8%, Wave 3: 4%
Other — Wave 1: 1%, Wave 2: <1%, Wave 3: 1%

■ Wave 1    ■ Wave 2    ■ Wave 3

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

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# Views on the current state of Naples

**The share of consumers who view the current state of the Paradise Coast positively increased by 10% points in comparison to Wave 2, up 17% points since Wave 1.**

## Views on the current state of Naples*

**Postive Response**
- 46%
- 53%
- 63%

**In Progress Response**
- 27%
- 22%
- 21%

**Negative Response**
- 13%
- 12%
- 9%

**Don't know**
- 14%
- 13%
- 6%

■ Wave 1   ■ Wave 2   ■ Wave 3
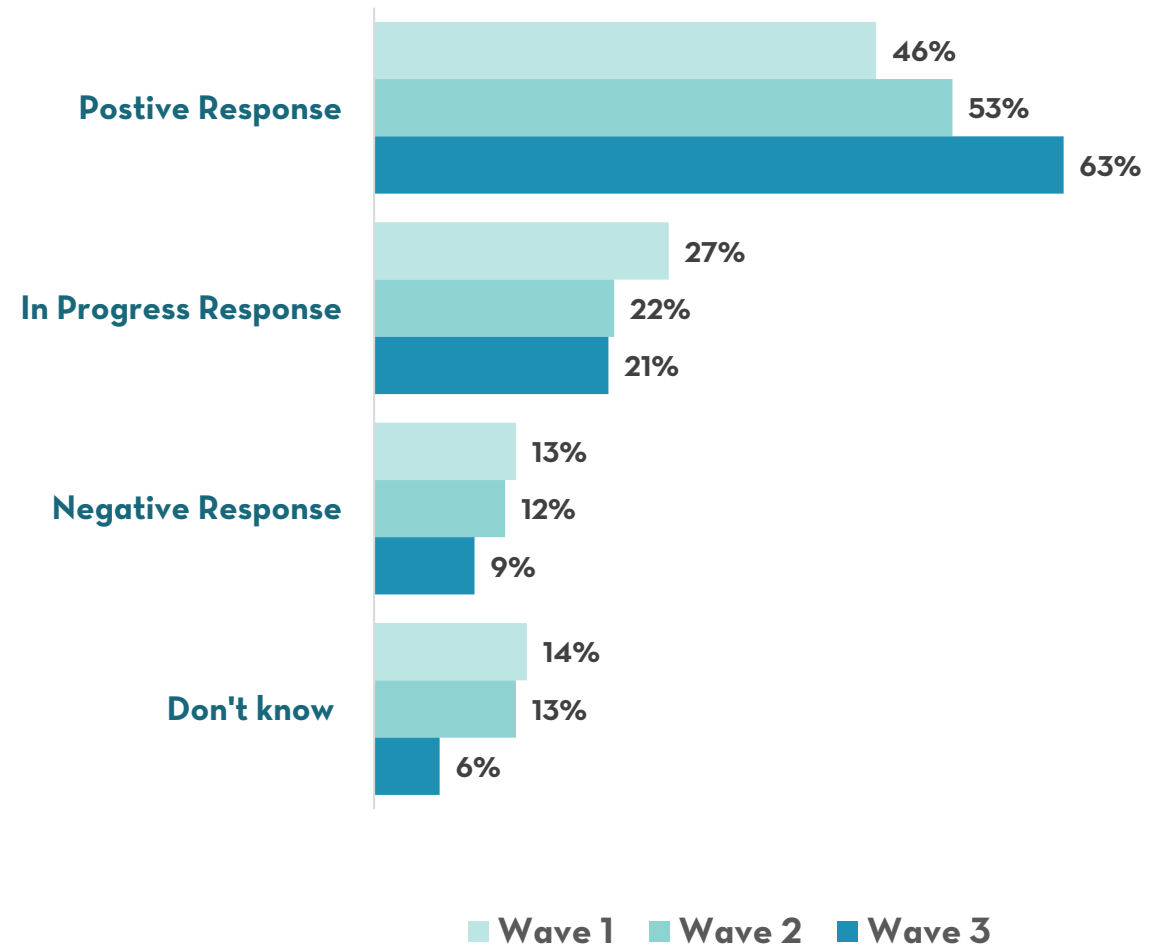
*Full Question: What one word or phrase best describes the current state of the Naples area?
Coded open-ended responses

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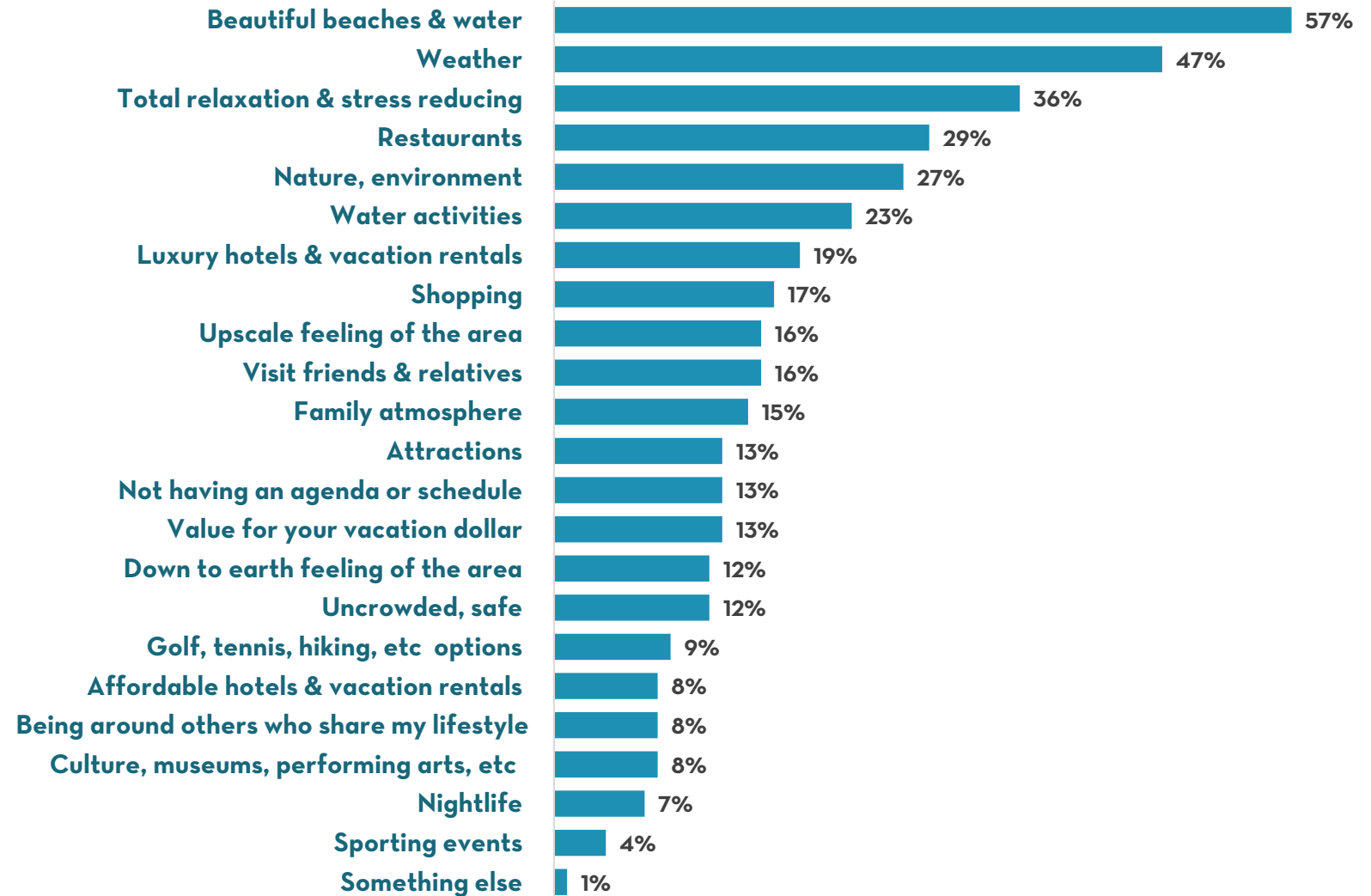
# Best Reasons to visit

Beautiful beaches & water, along with weather, were yet again considered the two best reasons to visit the Paradise Coast.
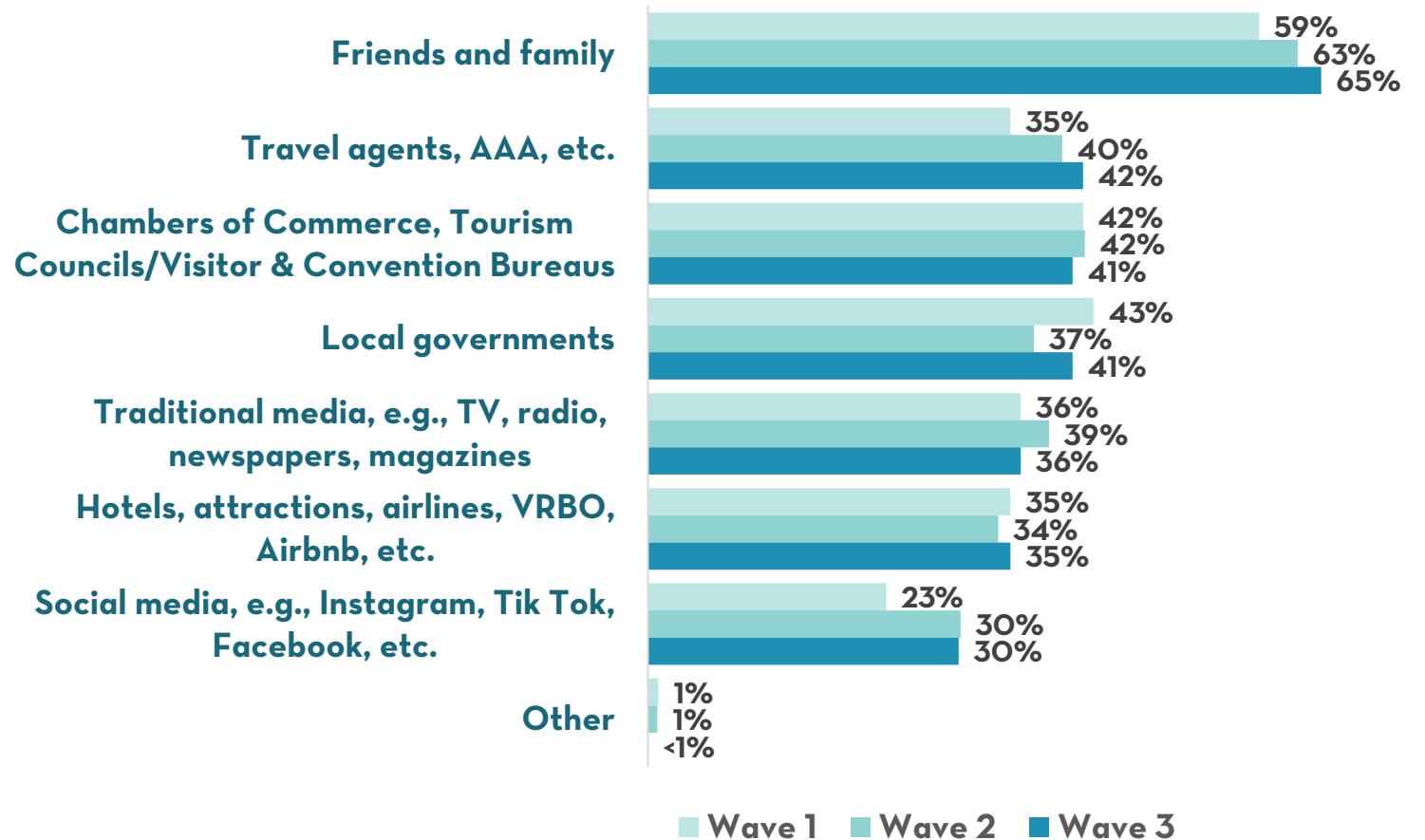
## Best Reasons to visit*

| Reason | % |
|---|---|
| Beautiful beaches & water | 57% |
| Weather | 47% |
| Total relaxation & stress reducing | 36% |
| Restaurants | 29% |
| Nature, environment | 27% |
| Water activities | 23% |
| Luxury hotels & vacation rentals | 19% |
| Shopping | 17% |
| Upscale feeling of the area | 16% |
| Visit friends & relatives | 16% |
| Family atmosphere | 15% |
| Attractions | 13% |
| Not having an agenda or schedule | 13% |
| Value for your vacation dollar | 13% |
| Down to earth feeling of the area | 12% |
| Uncrowded, safe | 12% |
| Golf, tennis, hiking, etc options | 9% |
| Affordable hotels & vacation rentals | 8% |
| Being around others who share my lifestyle | 8% |
| Culture, museums, performing arts, etc | 8% |
| Nightlife | 7% |
| Sporting events | 4% |
| Something else | 1% |

■ Wave 3

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

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# Trusted sources

**Friends and family were still considered the most trusted source of information regarding hurricane recovery.**

## Trusted sources*

| Source | Wave 1 | Wave 2 | Wave 3 |
|---|---|---|---|
| Friends and family | 59% | 63% | 65% |
| Travel agents, AAA, etc. | 35% | 40% | 42% |
| Chambers of Commerce, Tourism Councils/Visitor & Convention Bureaus | 42% | 42% | 41% |
| Local governments | 43% | 37% | 41% |
| Traditional media, e.g., TV, radio, newspapers, magazines | 36% | 39% | 36% |
| Hotels, attractions, airlines, VRBO, Airbnb, etc. | 35% | 34% | 35% |
| Social media, e.g., Instagram, Tik Tok, Facebook, etc. | 23% | 30% | 30% |
| Other | 1% | 1% | <1% |

■ Wave 1 ■ Wave 2 ■ Wave 3

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

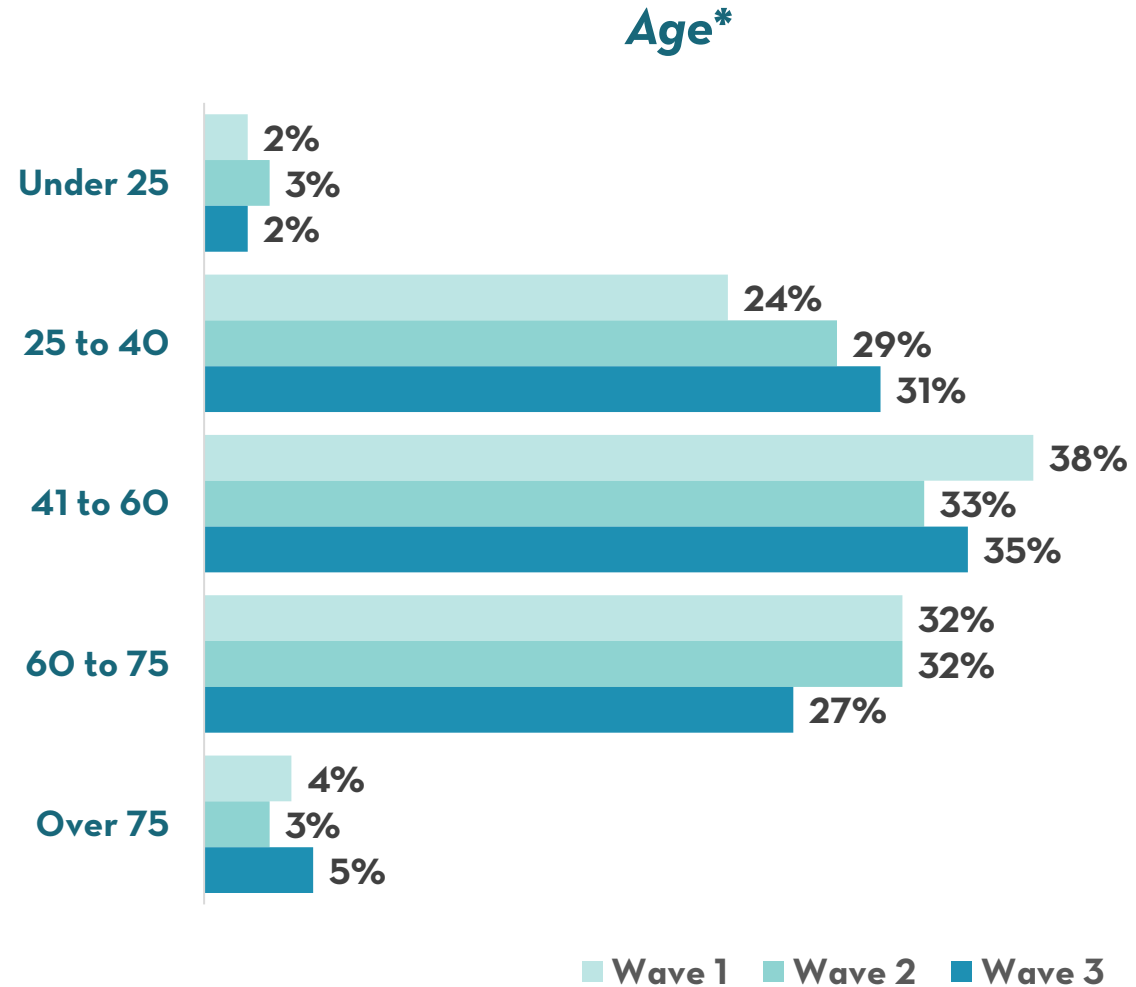NAPLES · MARCO ISLAND EVERGLADES℠
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Consumer Profile

# Age

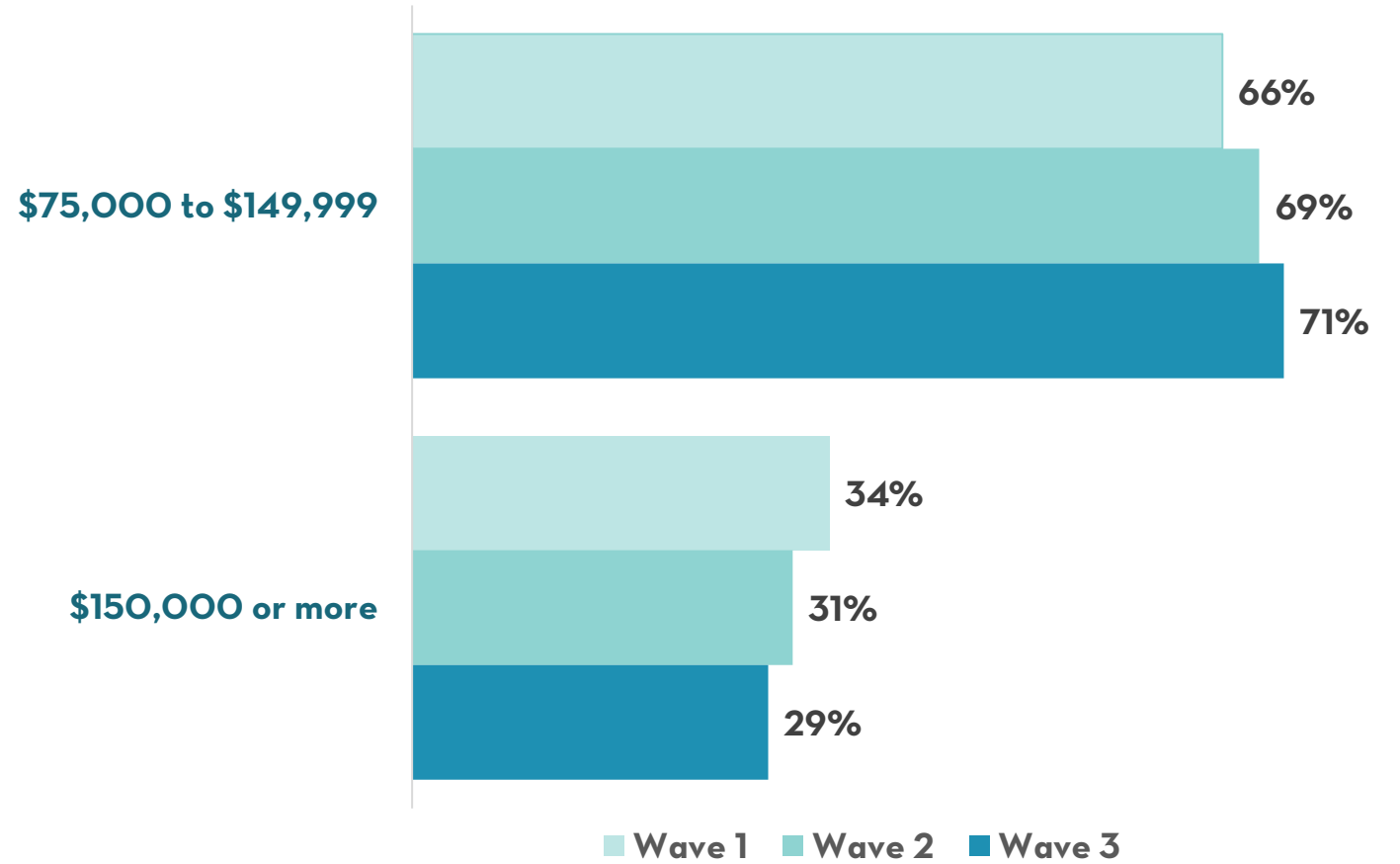**The median age was 51 years old.**

(Wave 1: 54, Wave 2: 51)

## Age*

| Age | Wave 1 | Wave 2 | Wave 3 |
|---|---|---|---|
| Under 25 | 2% | 3% | 2% |
| 25 to 40 | 24% | 29% | 31% |
| 41 to 60 | 38% | 33% | 35% |
| 60 to 75 | 32% | 32% | 27% |
| Over 75 | 4% | 3% | 5% |

■ Wave 1  ■ Wave 2  ■ Wave 3

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

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# Income

**The median income was $121,600.**

(Wave 1: $126.5k, Wave 2: $127k)

## Income*

| | Wave 1 | Wave 2 | Wave 3 |
|---|---|---|---|
| $75,000 to $149,999 | 66% | 69% | 71% |
| $150,000 or more | 34% | 31% | 29% |

■ Wave 1  ■ Wave 2  ■ Wave 3

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

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# Gender

**Consumers were still slightly more likely to be female than male**

## Gender*



Female
- 52% (Wave 1)
- 52% (Wave 2)
- 55% (Wave 3)

Male
- 47% (Wave 1)
- 48% (Wave 2)
- 45% (Wave 3)

Non-binary
- 1% (Wave 1)
- <1% (Wave 2)
- <1% (Wave 3)

■ Wave 1  ■ Wave 2  ■ Wave 3

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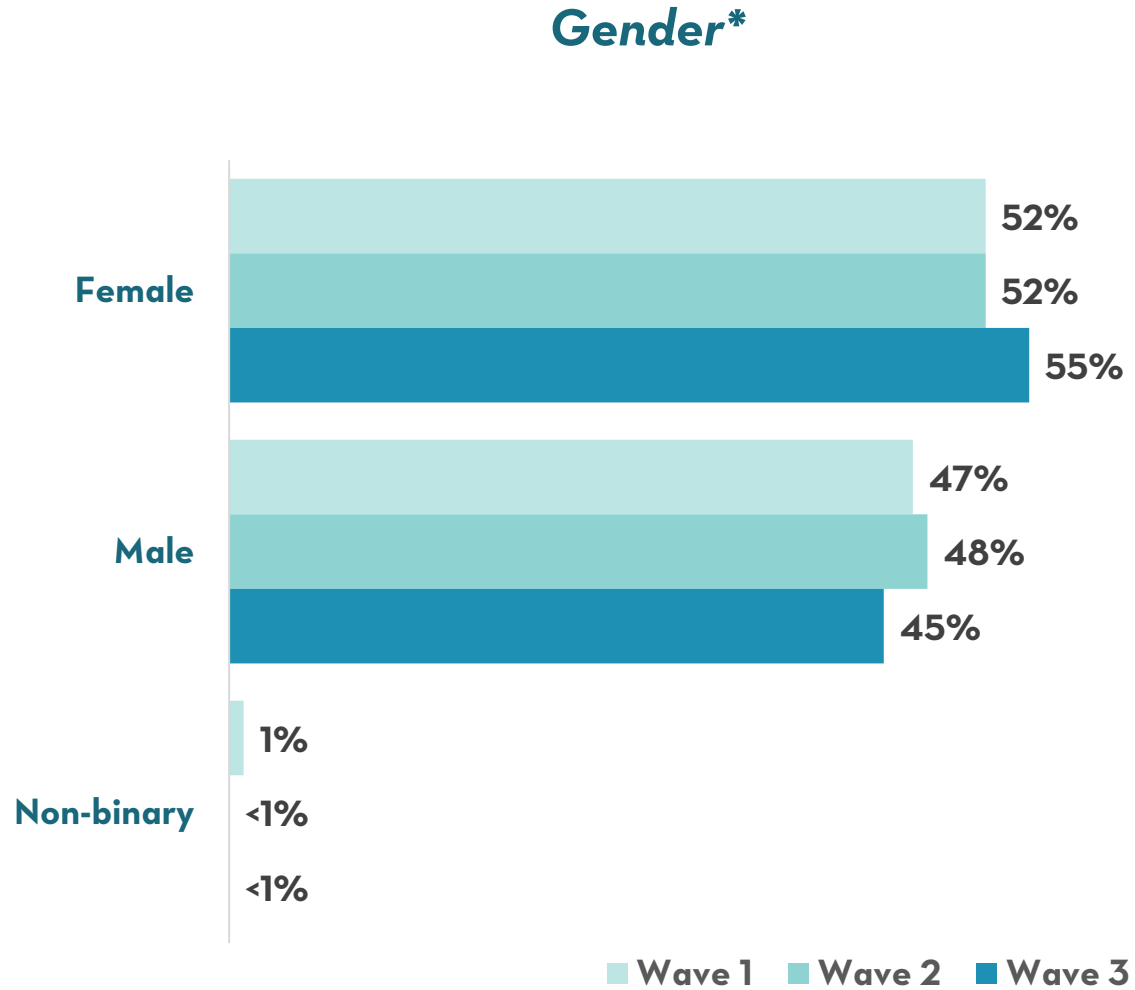
*Full Question: With which gender identity do you most closely identify?

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### Hurricane Study
May 2023

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