VISIT FLORIDA
Perceptions of Florida Survey

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Methodology

Internet survey

Data Collected:
July 30, 2010 – August 2, 2010

Sample size:
504 vacation decision makers
Executive Summary

“Everyone knows about the oil spill”

• 100% had noticed media coverage

• 52% have followed media coverage “very closely”

• Oil spill is:
  #1 news story for 59% of potential visitors
  1 of top 3 news stories for 75%
Executive Summary

“Oil spill has had an impact on behavior.”

• 14% have taken a Florida vacation this summer
• 3% have cancelled visits to Florida this summer
• 2% have cancelled trips due to the oil spill
Executive Summary

“Oil spill has affected all beaches.”

- 31% think it’s OK to vacation on all of Florida’s beaches

- Percentages who think it’s OK to vacation on:
  - 79% Daytona Beach/Cape Canaveral
  - 77% Miami/Ft. Lauderdale/Palm Beach
  - 67% Florida Keys
  - 65% Tampa/St. Pete/Clearwater
  - 59% Sarasota/Naples
  - 46% Panama City
  - 42% Destin
  - 40% Pensacola
Executive Summary

“Gulf Coast has been most affected.”

Feel safe planning a Florida **Gulf** Coast beach vacation:
- 43% Before Labor Day
- 52% Labor Day to Thanksgiving
- 53% Thanksgiving to New Years
- 65% After New Years

Feel safe planning a Florida **east** coast beach vacation:
- 69% Before Labor Day
- 72% Labor Day to Thanksgiving
- 74% Thanksgiving to New Years
- 79% After New Years
Executive Summary

“VISIT FLORIDA advertising is having an impact.”

• 49% have noticed advertising

• 22%* attribute advertising to VISIT FLORIDA

• Ad themes recalled – beaches are:
   Not affected
   Clean
   Open
   Safe
   Beautiful

*44% of the 49% (or 22%) who have noticed advertising attribute the advertising to VISIT FLORIDA.
Executive Summary

“VISIT FLORIDA advertising is having an impact.”

• Aided recall of ad messages
  35% Florida is open for business
  34% 825 miles of beaches – there’s a beach open for you
  17% More than enough to do in Florida
  15% Go to Florida Live & see conditions of beaches

• Impact of ads on intent to visit:
  73% No change in intent to visit
  25% Increase intent to visit
  2% Decrease intent to visit
Executive Summary

“VISIT FLORIDA advertising is having an impact.”

• Perceived main message of “More than Enough” ad
  • Beaches are unaffected
  • There are miles of beaches
  • Beaches are open
  • You can view beaches online
  • Beaches are clean
Executive Summary

“VISIT FLORIDA – visible & credible.”

- 44% of people who noticed advertising describing beach conditions attributed the advertising to VISIT FLORIDA

- 51% of people who have heard of VISIT FLORIDA trust it totally/for the most part
Executive Summary

“VISITFLORIDA.com has had some impact.”

• 6% have been to the website in the past month
• 7% have seen Florida Live
• 6 in 10 who have been to Florida Live:
  Know more about which beaches are open
  Feel assured that beaches are open & safe
• 31% of those who visited VISITFLORIDA.com increased their probability of vacationing in Florida before Labor Day
Executive Summary

“People get information about Florida beaches from many sources.”

- 26% talked with Florida residents
- 29% talked with people who had recently visited Florida beaches
- 19% had discussed Florida beaches in social media
Findings
News Stories Followed

- Oil Spill: #1 Story 59%
- Oil Spill: One of Top 3 Stories 75%
Have you taken a vacation to Florida this summer?

- Yes: 14%
- No: 86%
- Not sure: 0%
Have you cancelled any vacations to Florida this summer?

- Yes: 3%
- No: 97%
Why did you decide not to go?*

- **Concern about oil spill**: 63%
- **Money**: 21%
- **Job-related issues**: 21%
- **Personal/family issues**: 11%
- **Liked another place better/better deal elsewhere**: 5%

* More than one response permitted

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**People who cancelled vacations to Florida**

**All people**
Have you seen or heard any media coverage about the oil spill in the Gulf of Mexico?
How closely have you been following media coverage of this oil spill?

- Very closely: 52%
- Somewhat: 44%
- Barely at all: 4%
From media coverage you've seen about the oil spill in the Gulf, do you think it is OK to vacation on:

- All of Florida's beaches: 31%
- Some of Florida's beaches: 64%
- None of Florida's beaches: 5%
Based on what you have heard or seen about the oil spill, which Florida beaches are OK to take a vacation?

<table>
<thead>
<tr>
<th>Area</th>
<th>OK</th>
<th>Not OK</th>
<th>Not sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daytona Beach/Cape Canaveral</td>
<td>76%</td>
<td>7%</td>
<td>17%</td>
</tr>
<tr>
<td>Miami/ Ft. Lauderdale/ Palm Beach</td>
<td>75%</td>
<td>7%</td>
<td>18%</td>
</tr>
<tr>
<td>Jacksonville/St. Augustine</td>
<td>70%</td>
<td>9%</td>
<td>20%</td>
</tr>
<tr>
<td>Florida Keys</td>
<td>65%</td>
<td>13%</td>
<td>22%</td>
</tr>
<tr>
<td>Tampa/ Clearwater/ St. Petersburg</td>
<td>63%</td>
<td>13%</td>
<td>24%</td>
</tr>
<tr>
<td>Sarasota/Naples</td>
<td>58%</td>
<td>11%</td>
<td>31%</td>
</tr>
<tr>
<td>Panama City</td>
<td>45%</td>
<td>22%</td>
<td>33%</td>
</tr>
<tr>
<td>Destin</td>
<td>41%</td>
<td>18%</td>
<td>42%</td>
</tr>
<tr>
<td>Pensacola</td>
<td>40%</td>
<td>29%</td>
<td>31%</td>
</tr>
</tbody>
</table>
How likely you are to take a vacation to Florida between now and Labor Day?

- 51% Definitely not going
- 8% Not certain

14% have greater than 50% likelihood
Given what you have heard and seen about the oil spill, would you feel safe planning a vacation to one of the Gulf of Mexico beach areas in Florida?

- Before Labor Day: 43%
- Between Labor Day and Thanksgiving: 52%
- Between Thanksgiving and New Years: 53%
- After New Years: 65%
Given what you have heard and seen about the oil spill, would you feel safe planning a vacation to one of the east coast beach areas in Florida?

- Before Labor Day: 69%
- Between Labor Day and Thanksgiving: 72%
- Between Thanksgiving and New Years: 74%
- After New Years: 79%
Have you discussed the condition of Florida's beaches with anyone who lives in Florida?

- Yes: 26%
- No: 73%
- Not sure: 0%
Have you discussed the condition of Florida's beaches with anyone who has visited Florida in the past few weeks?

- Yes: 29%
- No: 70%
- Not sure: 1%
Have you seen or heard or discussed anything on Facebook, Twitter, YouTube or any other social media in the past month concerning the condition of Florida's beaches?
Have you vacationed on Florida's beaches in the past 5 years?

- Yes: 66%
- No/not sure: 34%
How many children 18 or younger are currently living in your household?

- 0: 53%
- 1: 21%
- 2: 17%
- 3+: 8%
Which age range fits you?

- 25 - 34: 27%
- 35 - 44: 25%
- 45 - 54: 27%
- 55 - 65: 21%
Are you male or female?

- Male: 45%
- Female: 55%
Which category best fits your total household income in 2009 from all sources?

- $50,000 - $74,999: 42%
- $75,000 - $99,999: 30%
- $100,000 - $149,999: 19%
- $150,000+: 8%
Cities in the survey:

Albany, GA
Atlanta, GA
Augusta, GA
Austin, TX
Baltimore, MD
Baton Rouge, LA
Birmingham, AL
Charlotte, NC
Chattanooga, TN
Chicago, IL
Cleveland, OH
Columbus, GA
Dallas, TX
Detroit, MI
Greenville, SC
Houston, TX
Jackson, MS
Knoxville, TN
Lexington, KY
Little Rock, AR
Macon, GA
Memphis, TN
Montgomery, AL
Nashville, TN
New Orleans, LA
New York, NY
Philadelphia, PA
Raleigh, NC
St. Louis, MO
Shreveport, LA
Washington, DC