




# VISIT FLORIDA

## Perceptions of Florida Survey: Wave 2



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# Methodology

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Internet survey

Data Collected:

August 27, 2010 – August 30, 2010

Sample size:

502 vacation decision makers

# Executive Summary

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“Oil spill is no longer a huge media story, but...”

- Oil spill is:
  - #1 news story for 26% of potential visitors (-33)
  - 1 of top 3 news stories for 41% (-34)
- 99% have noticed media coverage (-1)
- 45% have followed media coverage “very closely” (-7)

# Executive Summary

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“Oil spill has a residual impact on behavior.”

- 20% have taken a Florida vacation this summer (+6)
- 4% have cancelled visits to Florida this summer (+1)
- 3% have cancelled trips due to the oil spill (+1)

# Executive Summary

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“Oil spill has affected all beaches, but...”

- 41% think it's OK to vacation on all of Florida's beaches (+10)
- Percentages who think it's OK to vacation on:
  - 82% Miami/Ft. Lauderdale/Palm Beach (+7)
  - 78% Daytona Beach/Cape Canaveral (+2)
  - 74% Jacksonville/St. Augustine (+4)
  - 71% Florida Keys (+6)
  - 71% Tampa/St. Pete/Clearwater (+8)
  - 65% Sarasota/Naples (+7)
  - 56% Panama City (+11)
  - 56% Destin (+15)
  - 55% Pensacola (+15)

# Executive Summary

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“Gulf Coast has been most affected, yet there are signs of improvement. Perceptions of east coast beaches remain stubbornly at odds with reality.”

Feel safe planning a Florida **Gulf** Coast beach vacation:

- 50% Before Labor Day (+7)
- 58% Labor Day to Thanksgiving (+6)
- 63% Thanksgiving to New Years (+10)
- 72% After New Years (+7)

Feel safe planning a Florida **east** coast beach vacation:

- 69% Before Labor Day (No change)
- 73% Labor Day to Thanksgiving (+1)
- 76% Thanksgiving to New Years (+2)
- 80% After New Years (+1)

# Executive Summary

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“VISIT FLORIDA advertising has had an impact but is starting to fade somewhat.”

- 45% have noticed advertising (-4)
- 22%\* attribute advertising to VISIT FLORIDA (No change)
- Ad themes recalled – beaches are:
  - Clean
  - Safe
  - Beautiful
  - Open

# Executive Summary

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“VISIT FLORIDA advertising has had an impact but is starting to fade somewhat.”

- Aided recall of ad messages
  - 34% Florida is open for business (-1)
  - 31% 825 miles of beaches – there’s a beach open for you (-3)
  - 18% More than enough to do in Florida (+1)
  - 17% Go to Florida Live & see conditions of beaches (+2)
- Impact of ads on intent to visit:
  - 68% No change in intent to visit (-4)
  - 29% Increase intent to visit (+4)
  - 1% Decrease intent to visit (-1)



# Executive Summary

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“VISIT FLORIDA ‘More than Enough’ ad continues to score well.”

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

# Executive Summary

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“VISIT FLORIDA – visible & credible.”

- 49% of people who noticed advertising describing beach conditions attributed the advertising to VISIT FLORIDA (+5)
- 73% of people who have heard of VISIT FLORIDA trust it totally/for the most part

# Executive Summary

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“VISITFLORIDA.com has had some impact.”

- 8% have been to the website in the past month (+2)
- 11% have seen Florida Live (+4)
- 6 in 10 who have been to Florida Live:
  - Feel assured that beaches are open & safe
  - Feel better that they can see whether or not oil is affecting Florida beaches
- 49%\* of those who visited VISITFLORIDA.com increased their probability of vacationing in Florida before Labor Day (+18)

# Executive Summary

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“People get information about Florida beaches from many sources, but Florida is a less frequent topic after the oil spill.”

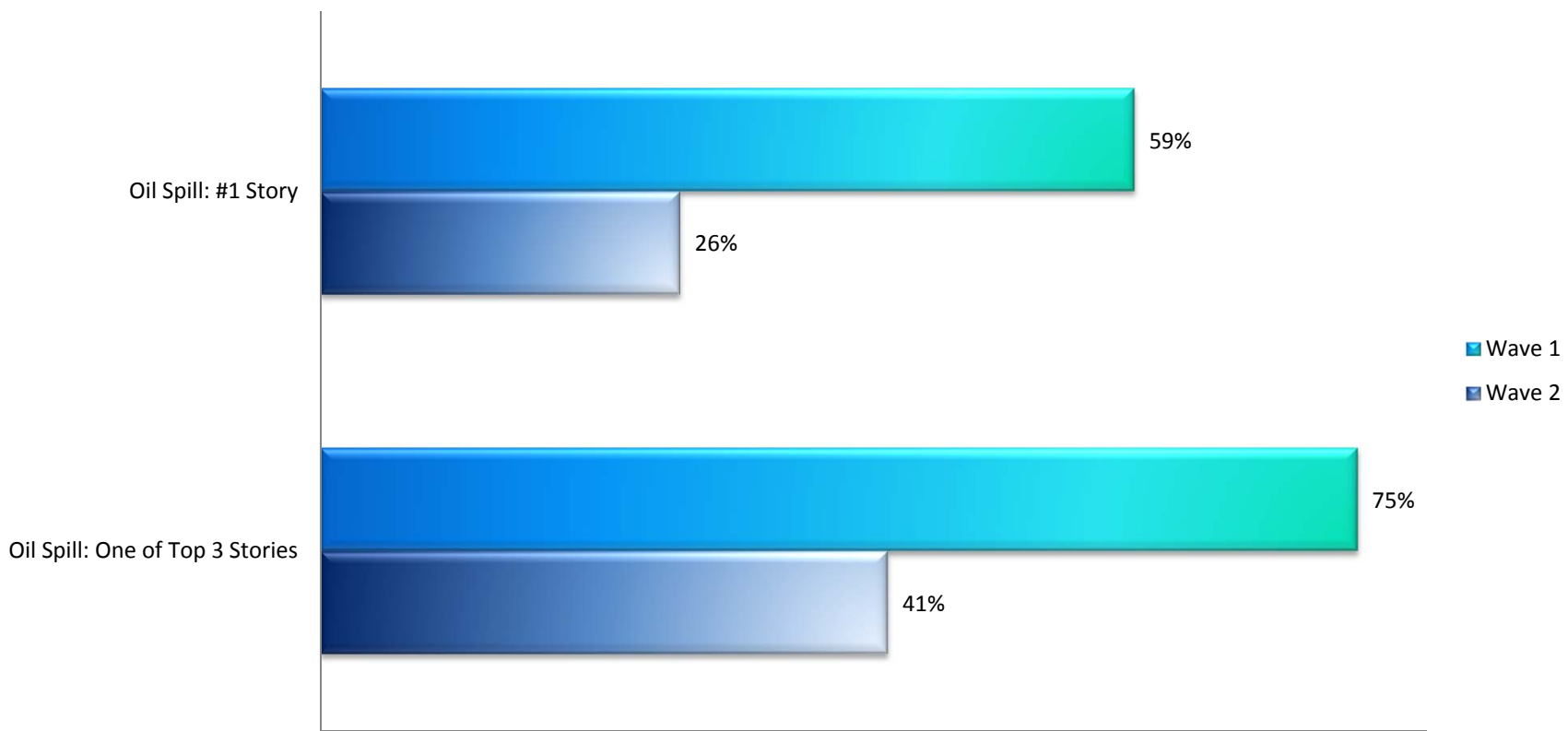
- 23% talked with Florida residents (-3)
- 23% talked with people who had recently visited Florida beaches (-6)
- 15% had discussed Florida beaches in social media (-4)

# Findings

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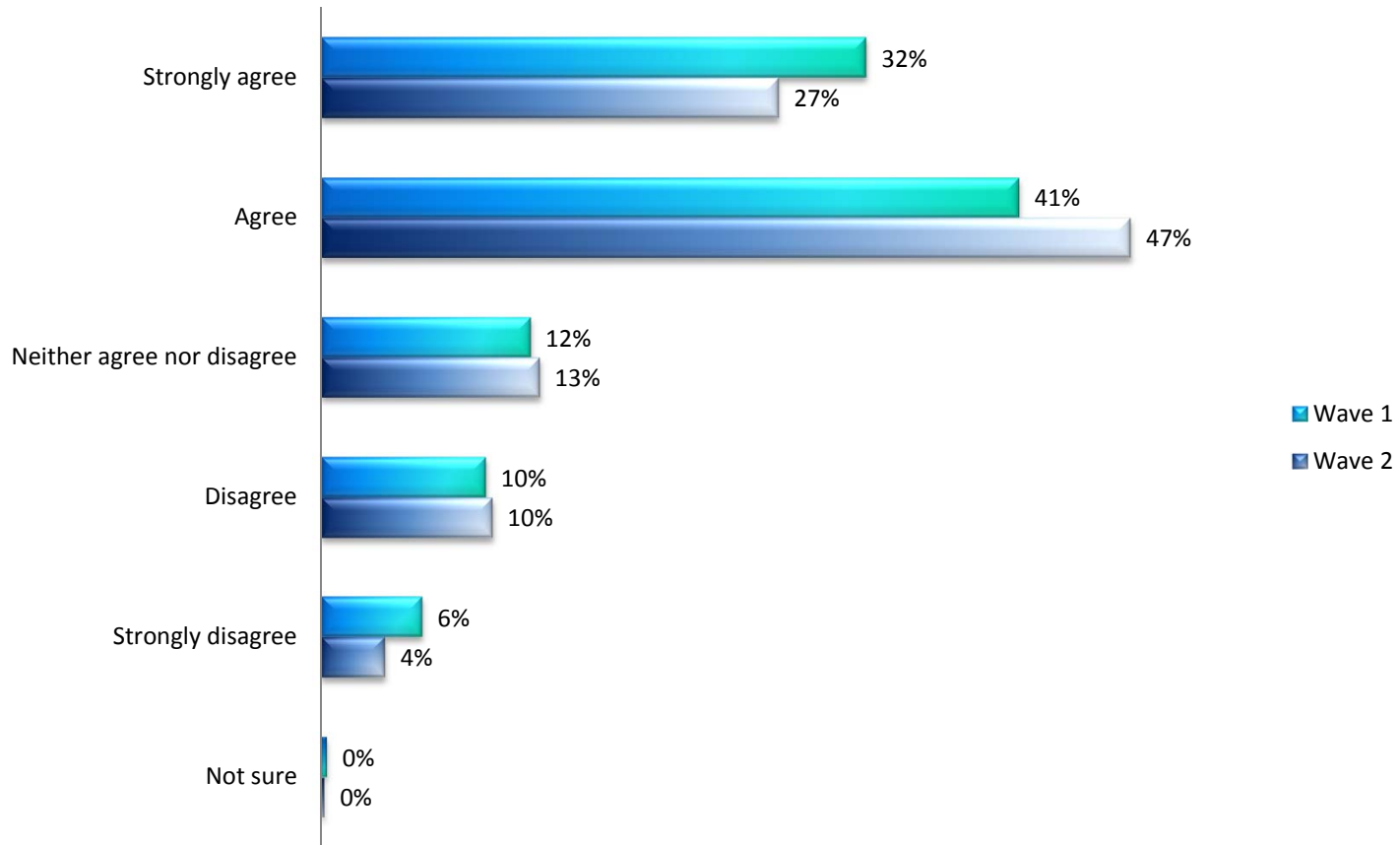
# News Stories Followed

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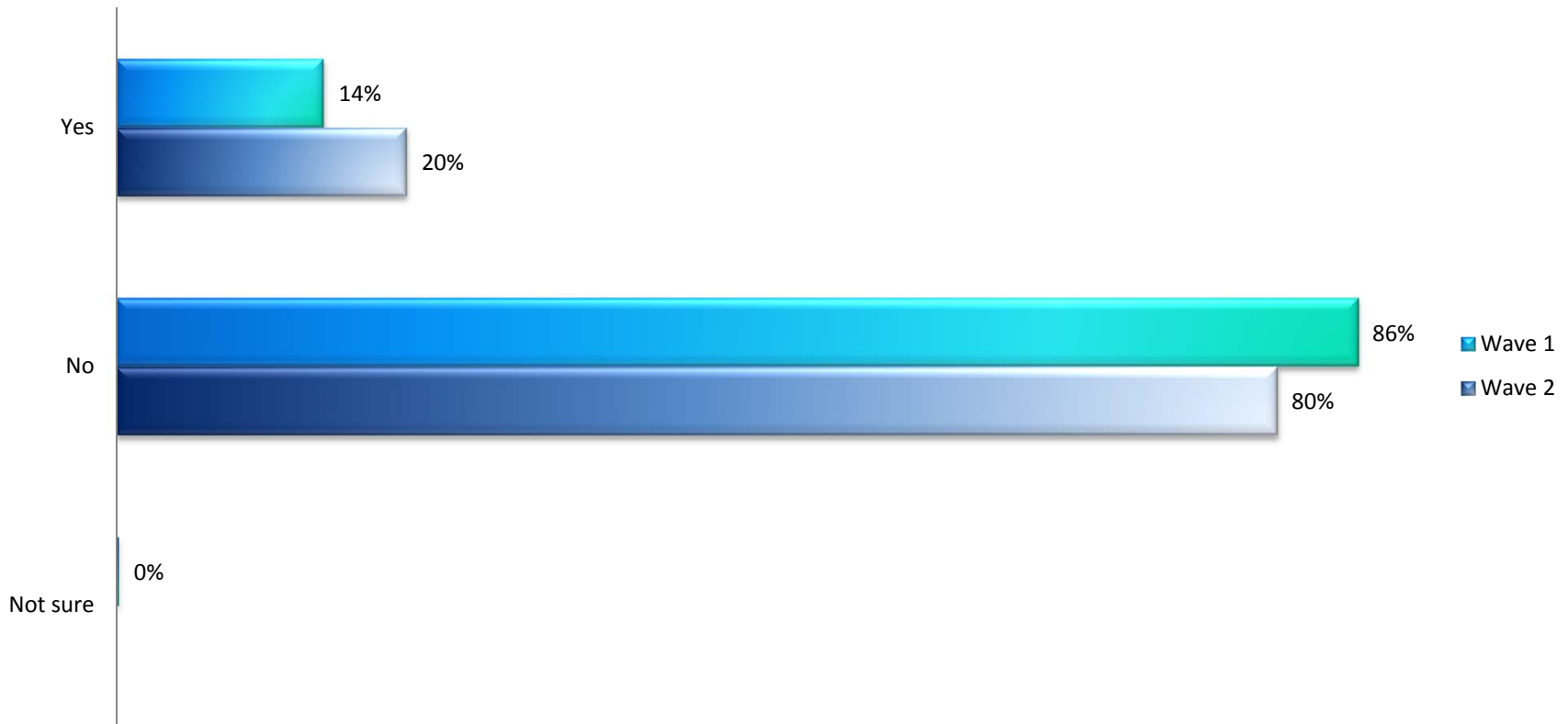
# Florida is a fine place to visit during the summer months.

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# Have you taken a vacation to Florida this summer?

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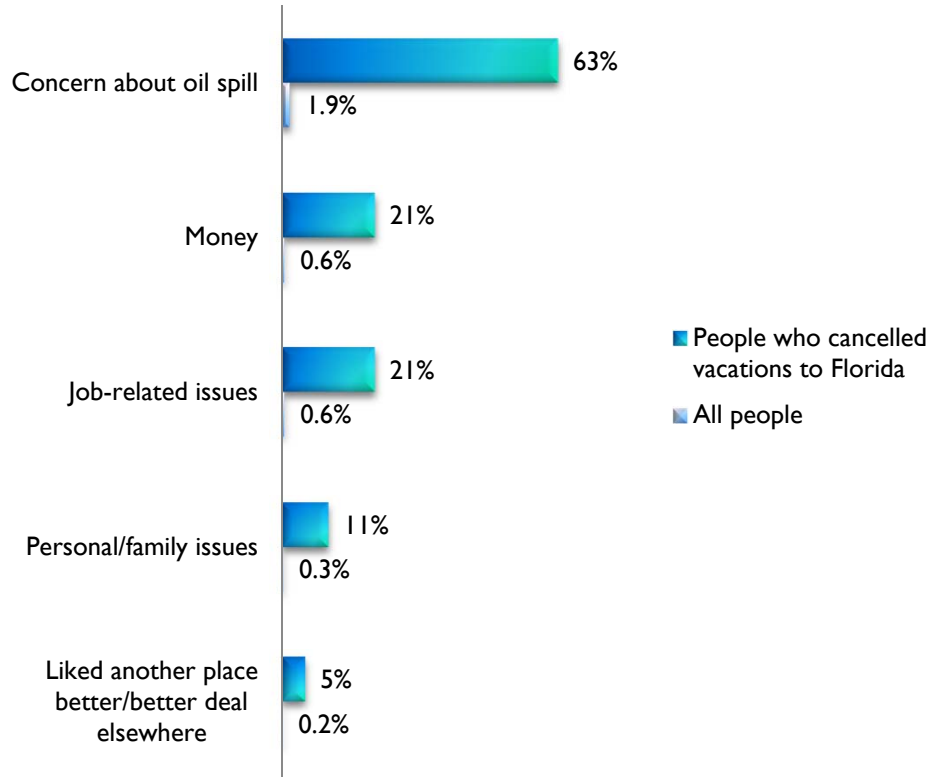
# Have you cancelled any vacations to Florida this summer?

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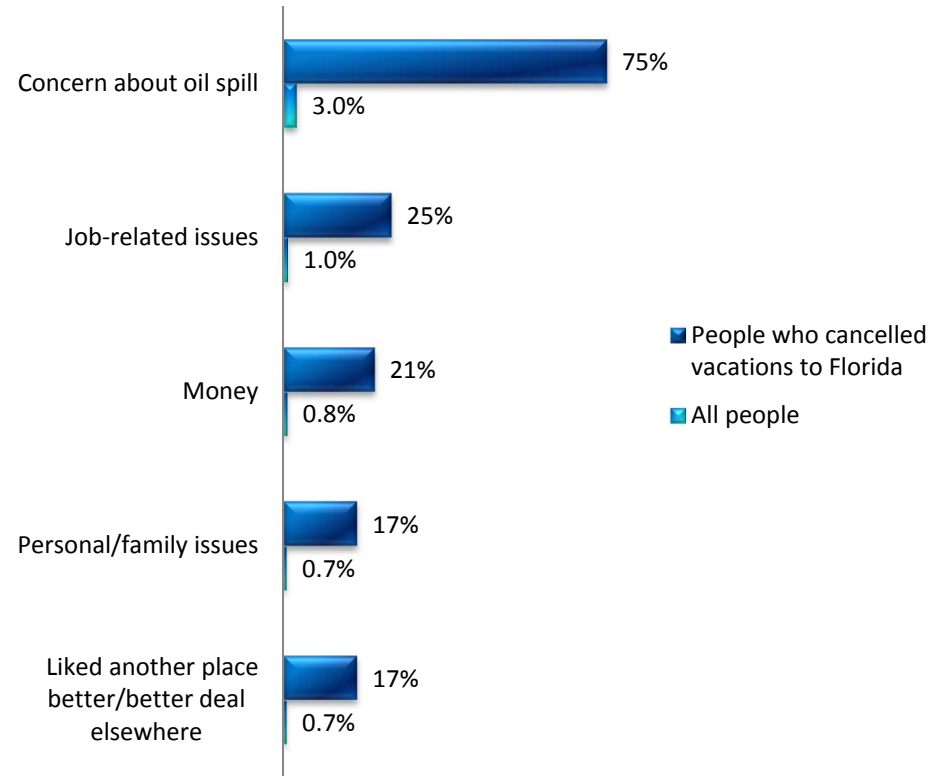


# Why did you decide not to go?\*

## Wave 1



## Wave 2



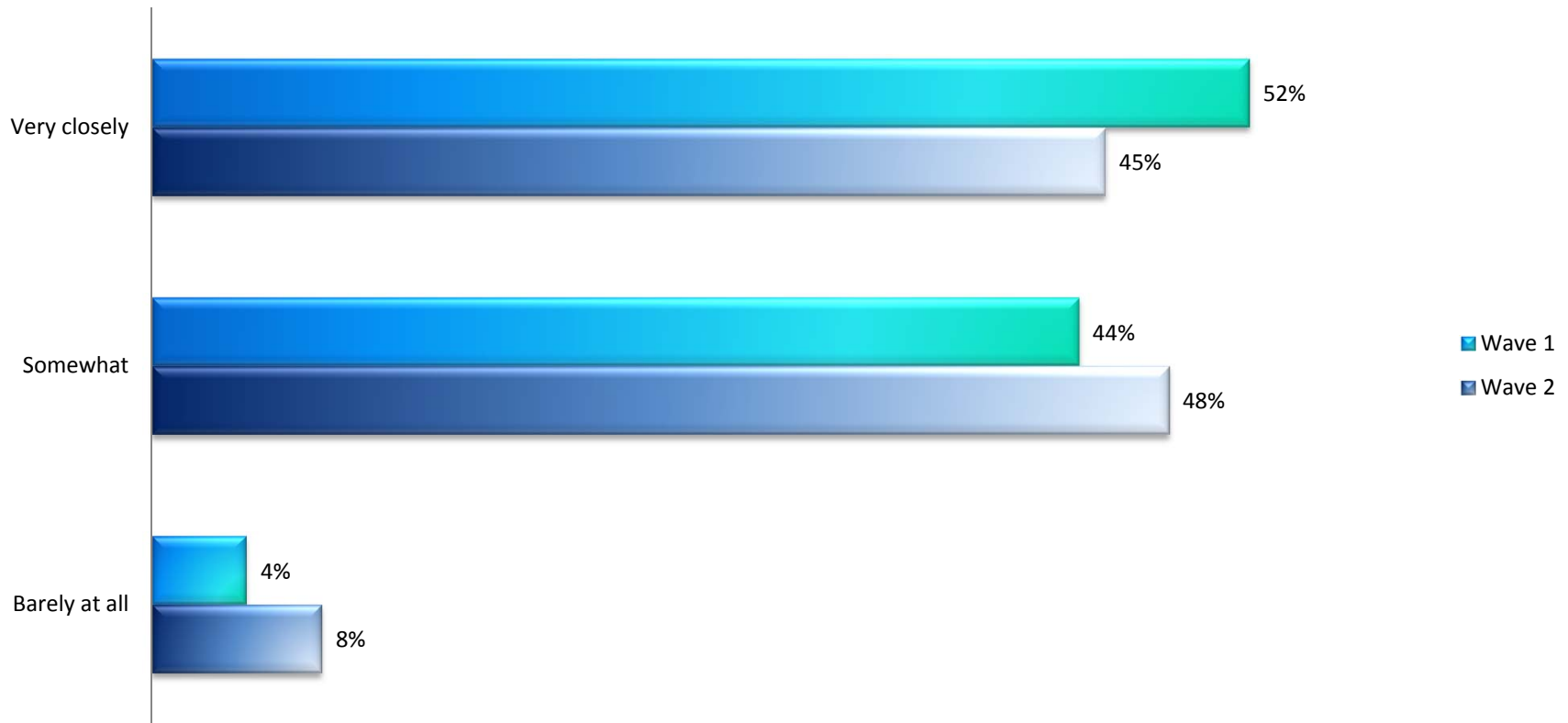
# Have you seen or heard any media coverage about the oil spill in the Gulf of Mexico?

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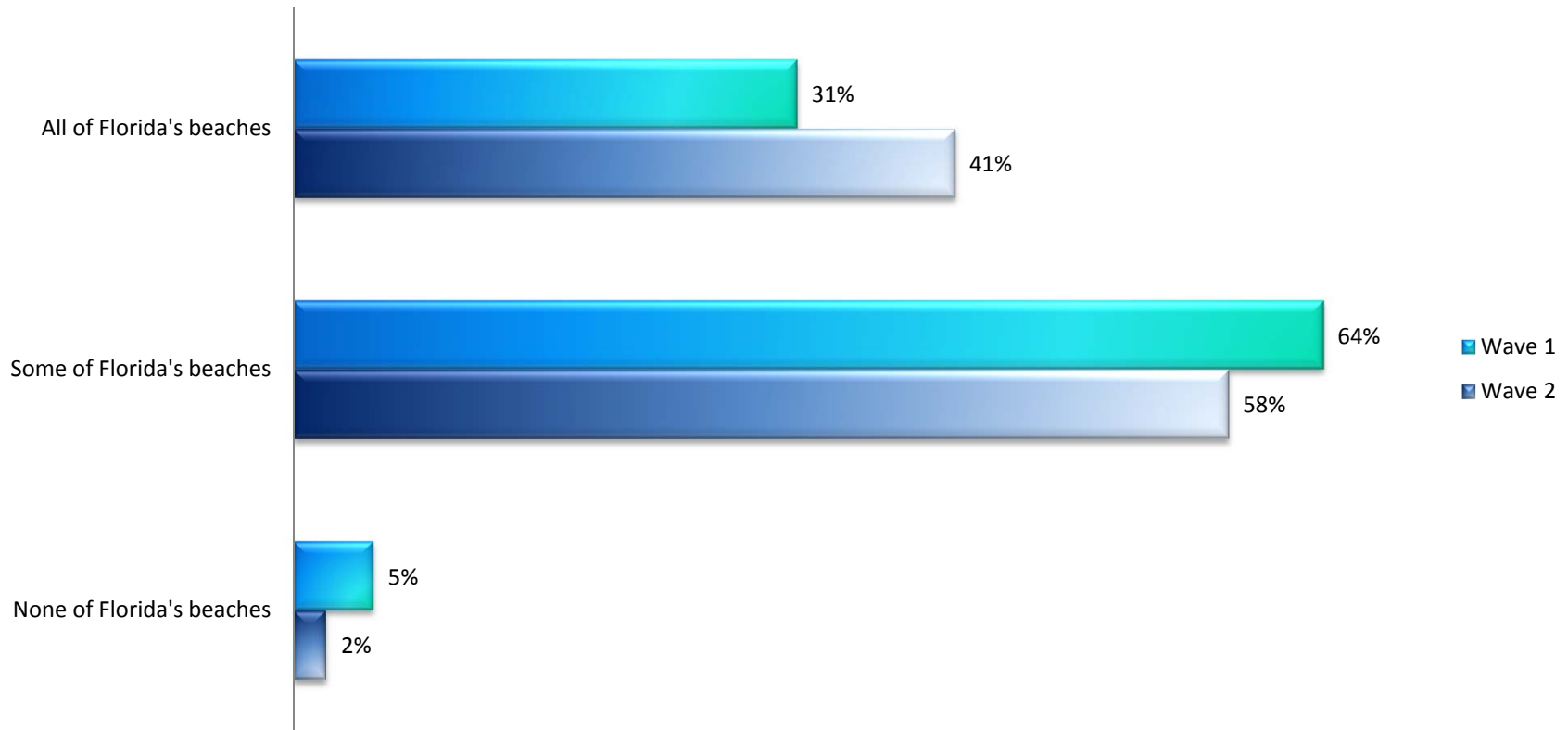


# How closely have you been following media coverage of this oil spill?

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From media coverage you've seen about the oil spill in the Gulf, do you think it is OK to vacation on:



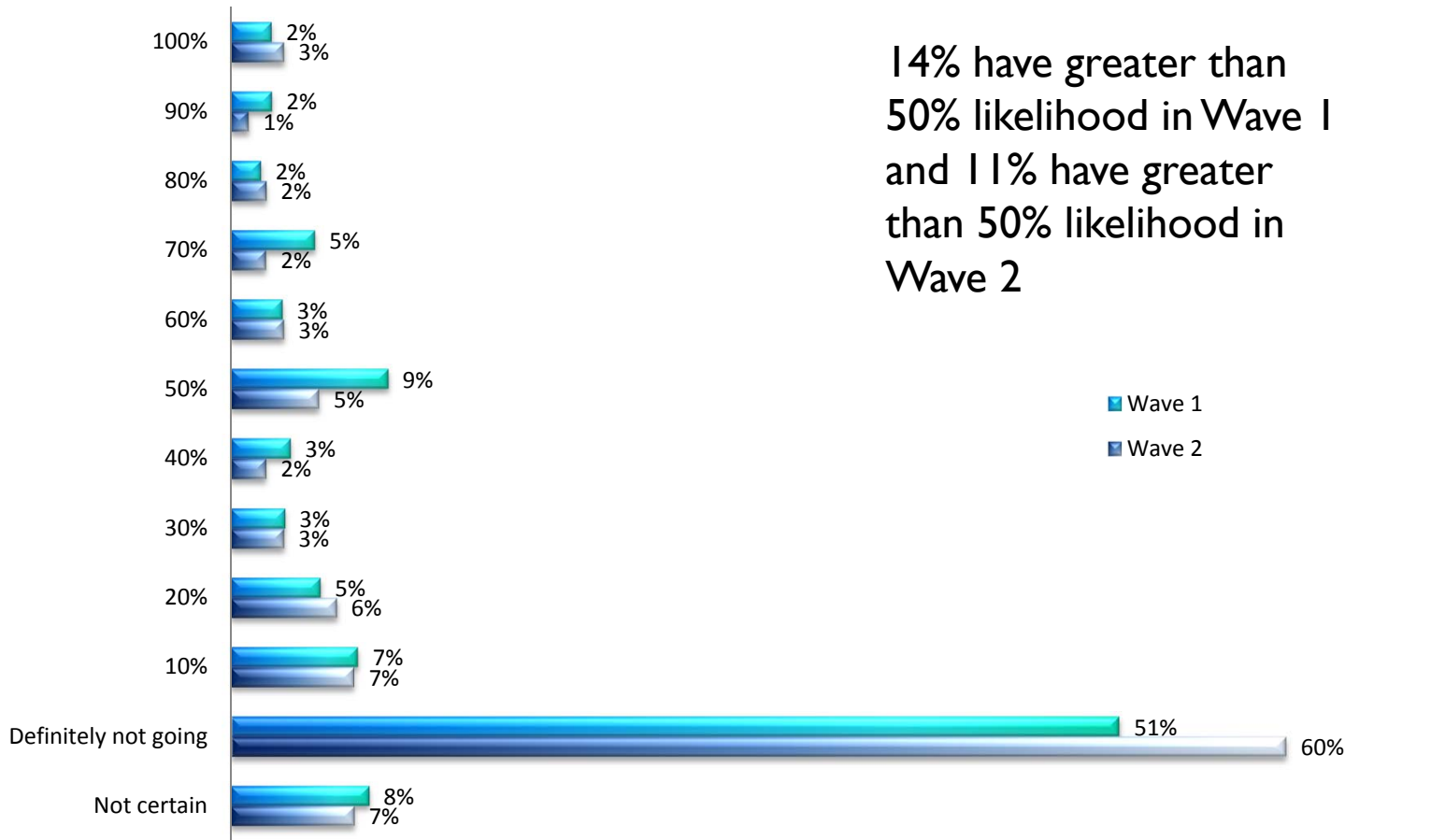
## Based on what you have heard or seen about the oil spill, which Florida beaches are OK to take a vacation?

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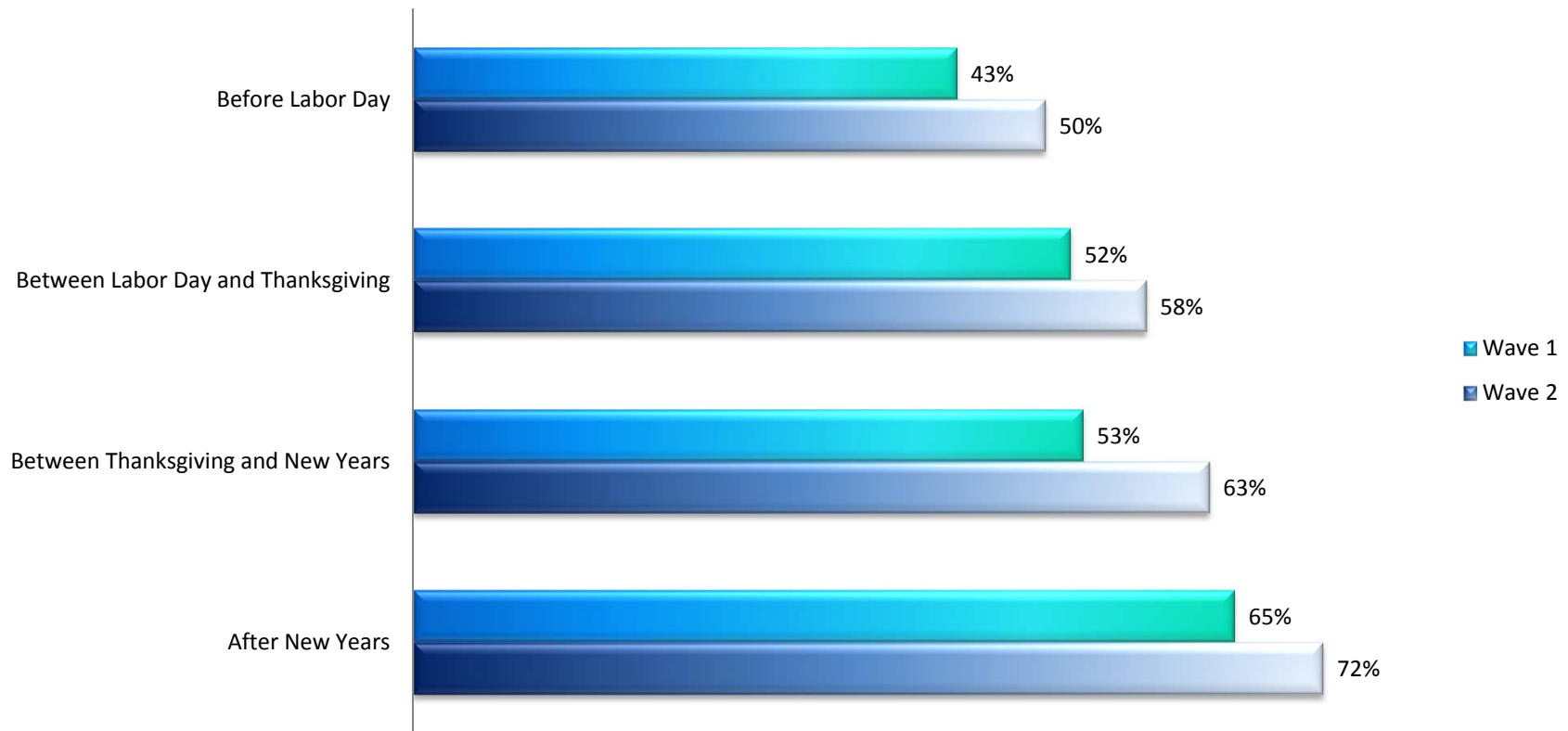
<i>Wave 1</i>			
<i>Area</i>	<i>OK</i>	<i>Not OK</i>	<i>Not sure</i>
Daytona Beach/Cape Canaveral	76%	7%	17%
Miami/ Ft. Lauderdale/ Palm Beach	75%	7%	18%
Jacksonville/St. Augustine	70%	9%	20%
Florida Keys	65%	13%	22%
Tampa/ Clearwater/ St. Petersburg	63%	13%	24%
Sarasota/Naples	58%	11%	31%
Panama City	45%	22%	33%
Destin	41%	18%	42%
Pensacola	40%	29%	31%

<i>Wave 2</i>			
<i>Area</i>	<i>OK</i>	<i>Not OK</i>	<i>Not sure</i>
Miami/ Ft. Lauderdale/ Palm Beach	82%	5%	15%
Daytona Beach/Cape Canaveral	78%	5%	19%
Jacksonville/St. Augustine	74%	7%	20%
Florida Keys	71%	8%	22%
Tampa/ Clearwater/ St. Petersburg	71%	8%	23%
Sarasota/Naples	65%	5%	28%
Panama City	56%	7%	28%
Destin	56%	14%	31%
Pensacola	55%	18%	28%

# How likely you are to take a vacation to Florida between now and Labor Day?

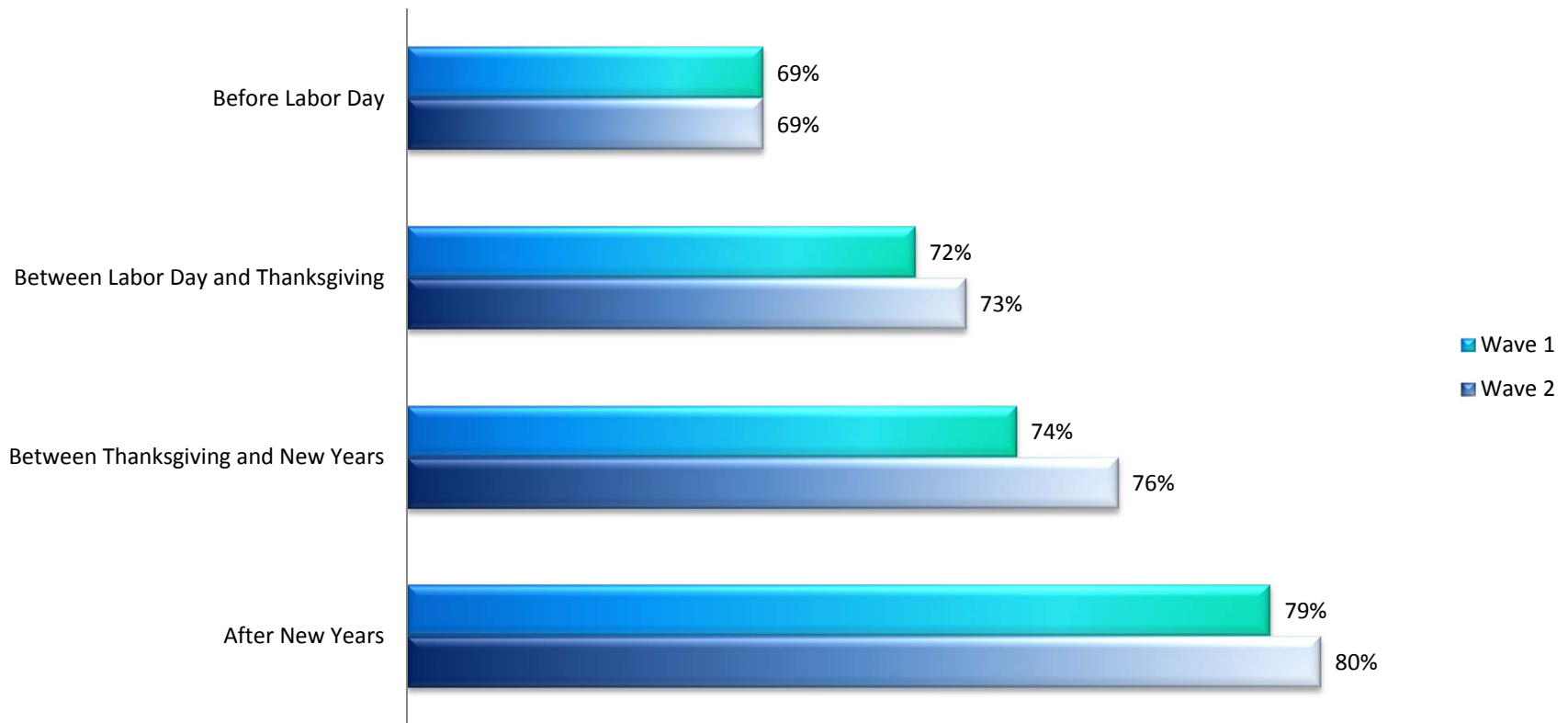


# Given what you have heard and seen about the oil spill, would you feel safe planning a vacation to one of the Gulf of Mexico beach areas in Florida?



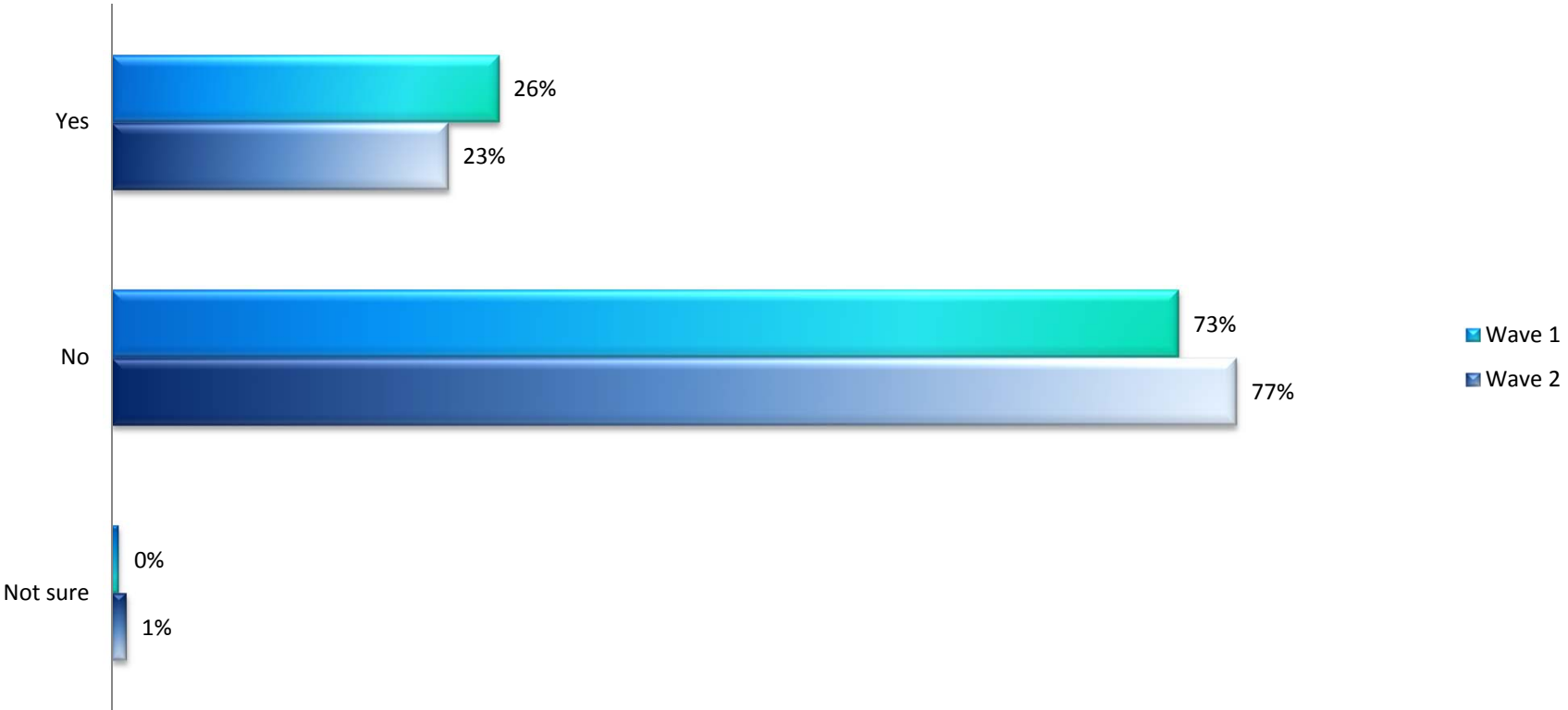


Given what you have heard and seen about the oil spill, would you feel safe planning a vacation to one of the east coast beach areas in Florida?



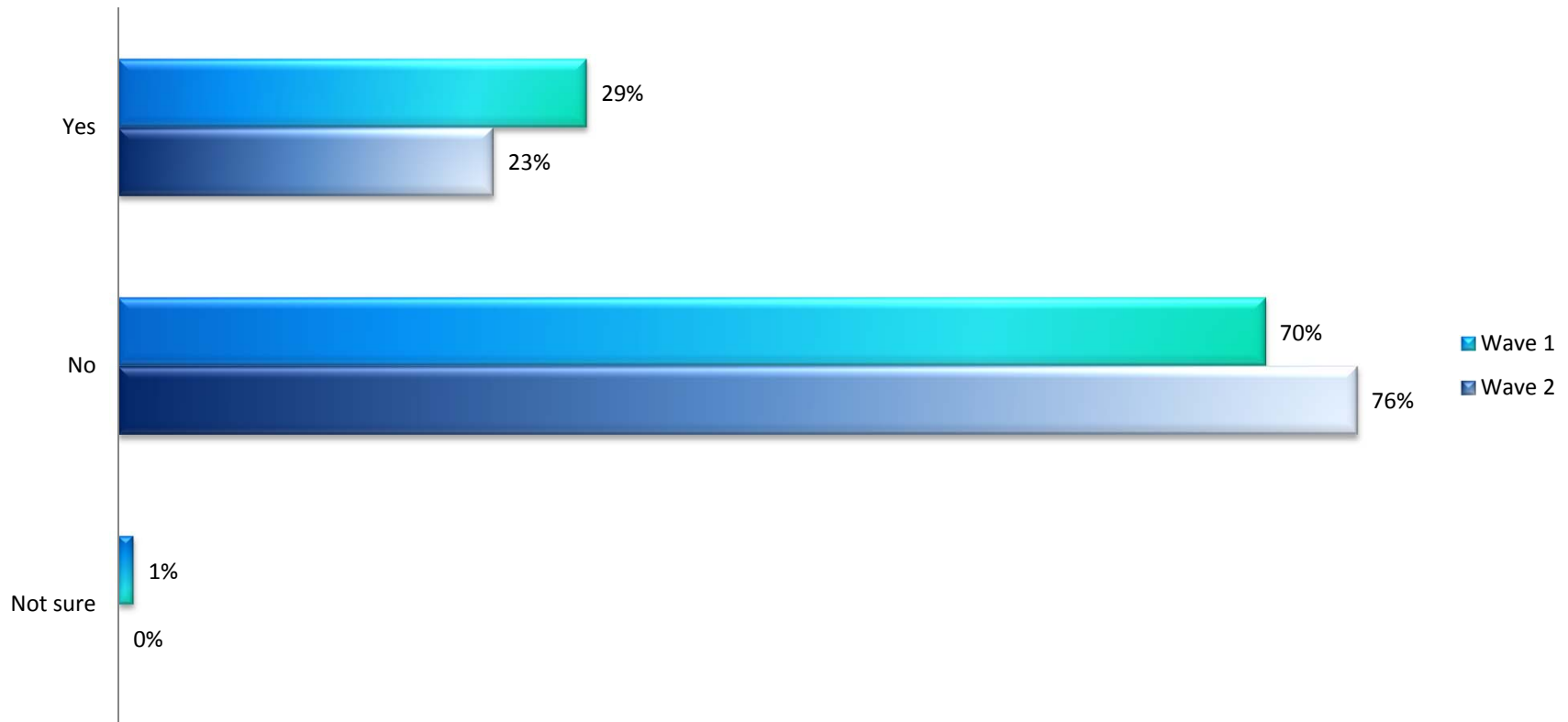
# Have you discussed the condition of Florida's beaches with anyone who lives in Florida?

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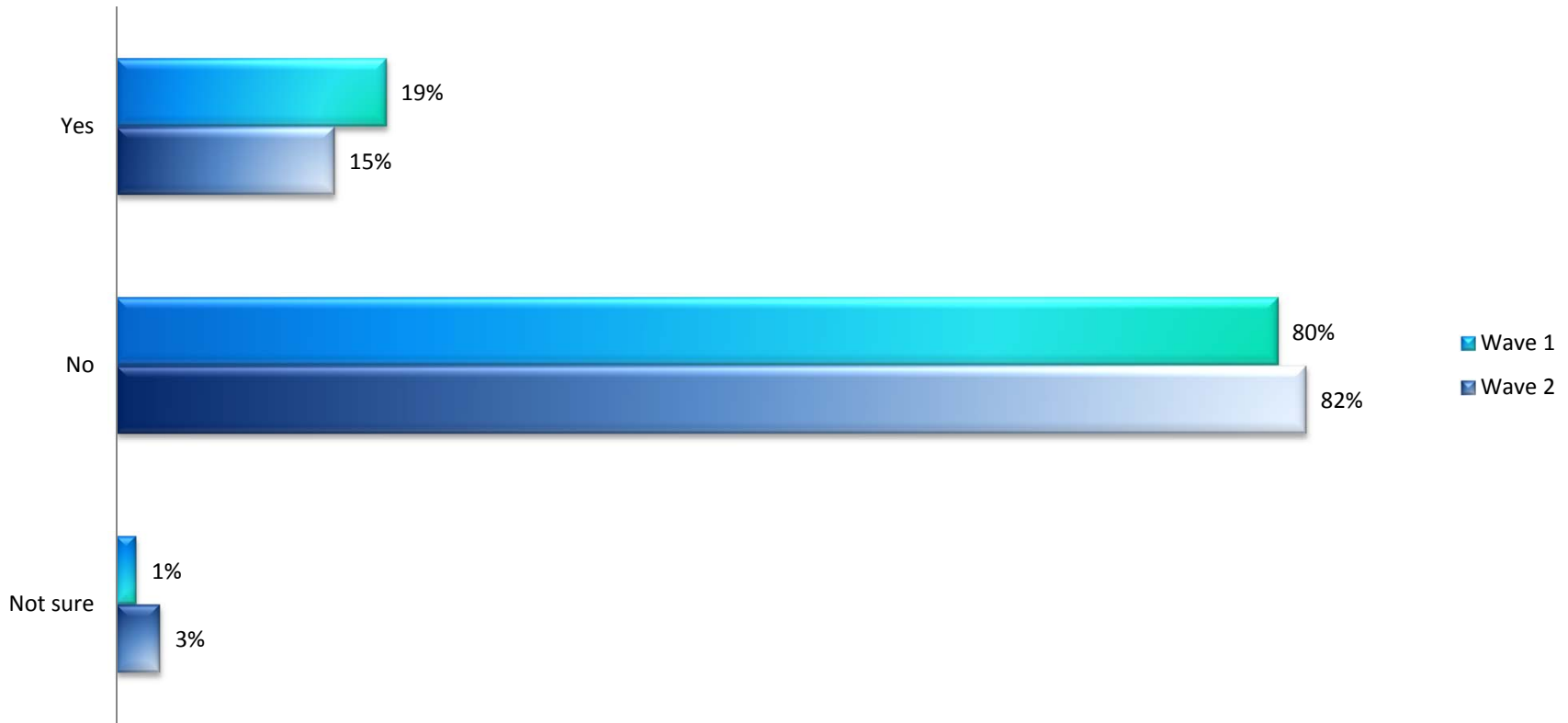
# Have you discussed the condition of Florida's beaches with anyone who has visited Florida in the past few weeks?

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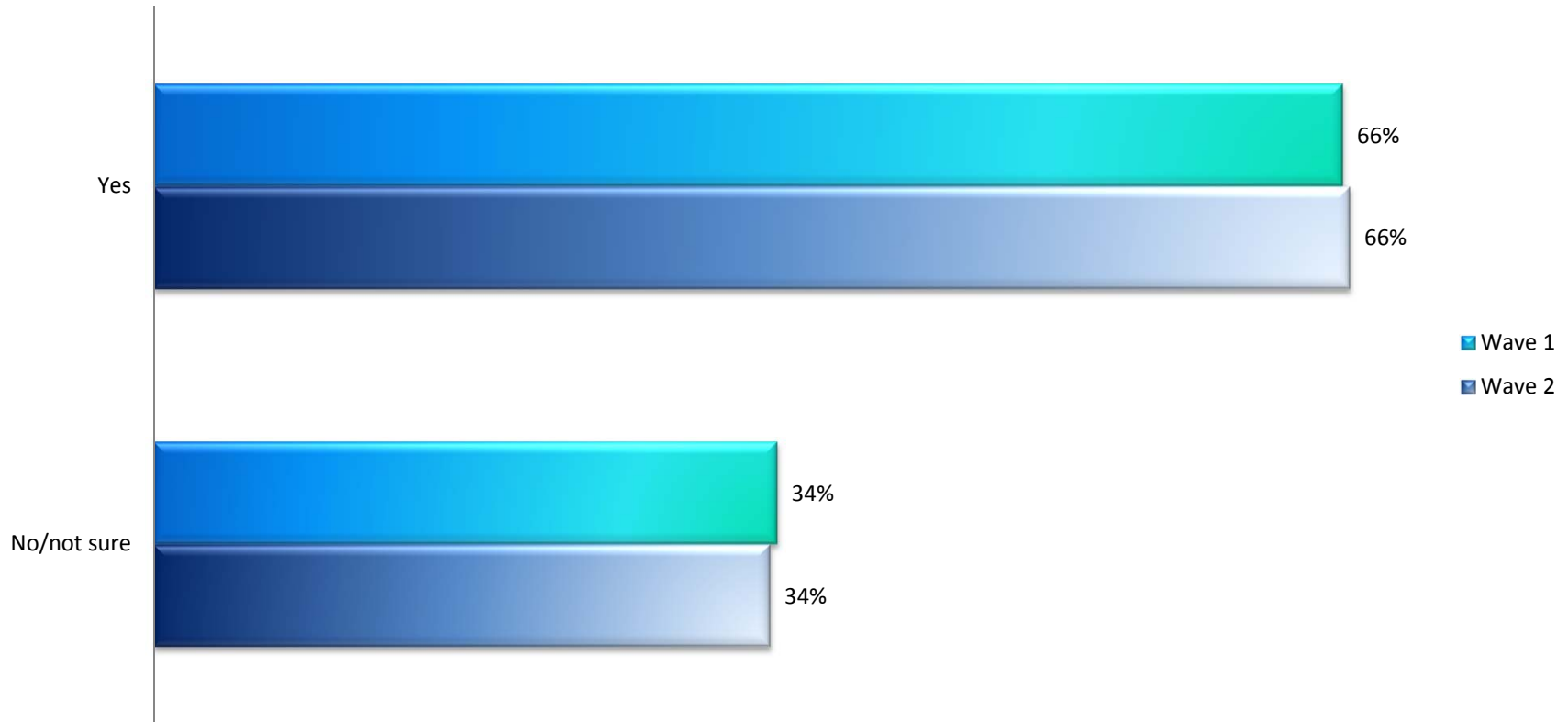
Have you seen or heard or discussed anything on Facebook, Twitter, YouTube or any other social media in the past month concerning the condition of Florida's beaches?

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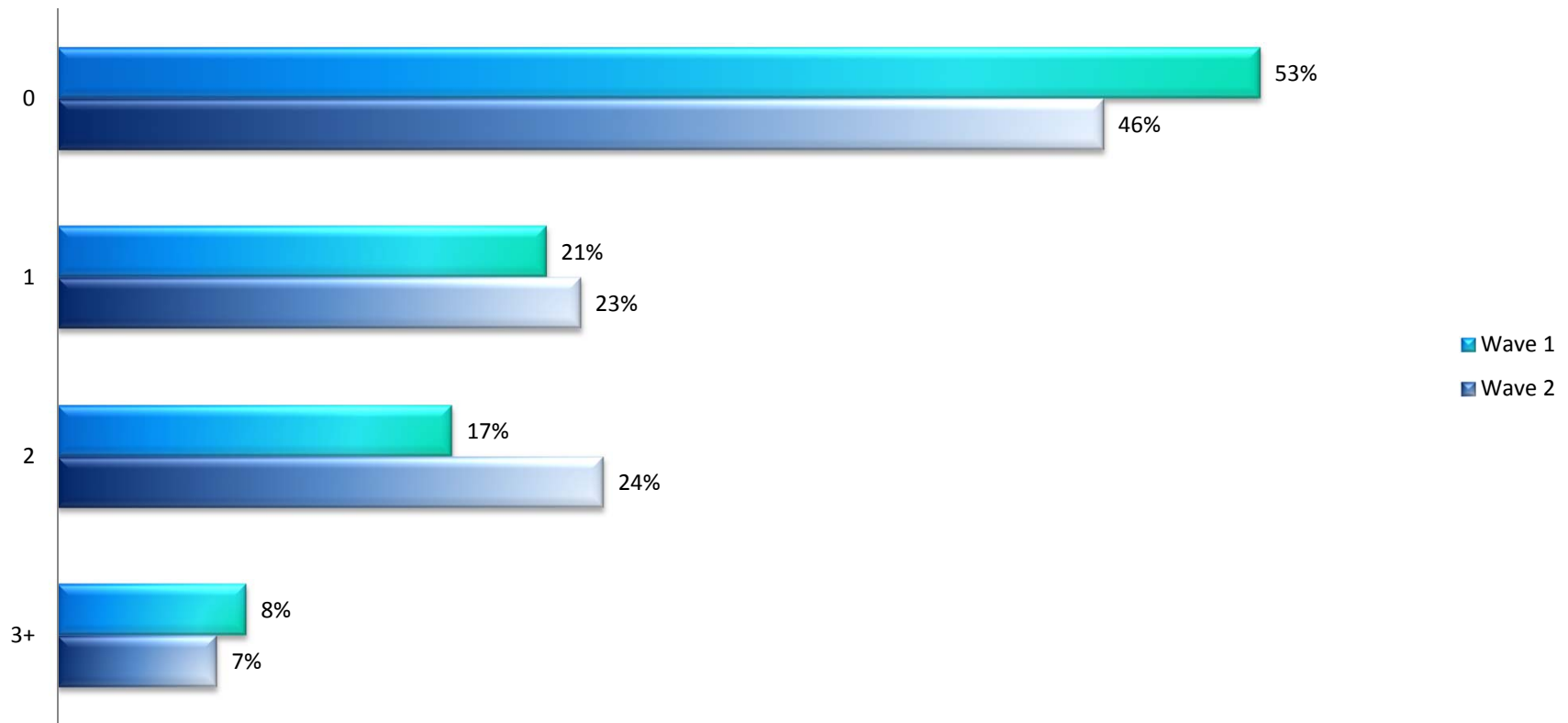
# Have you vacationed on Florida's beaches in the past 5 years?

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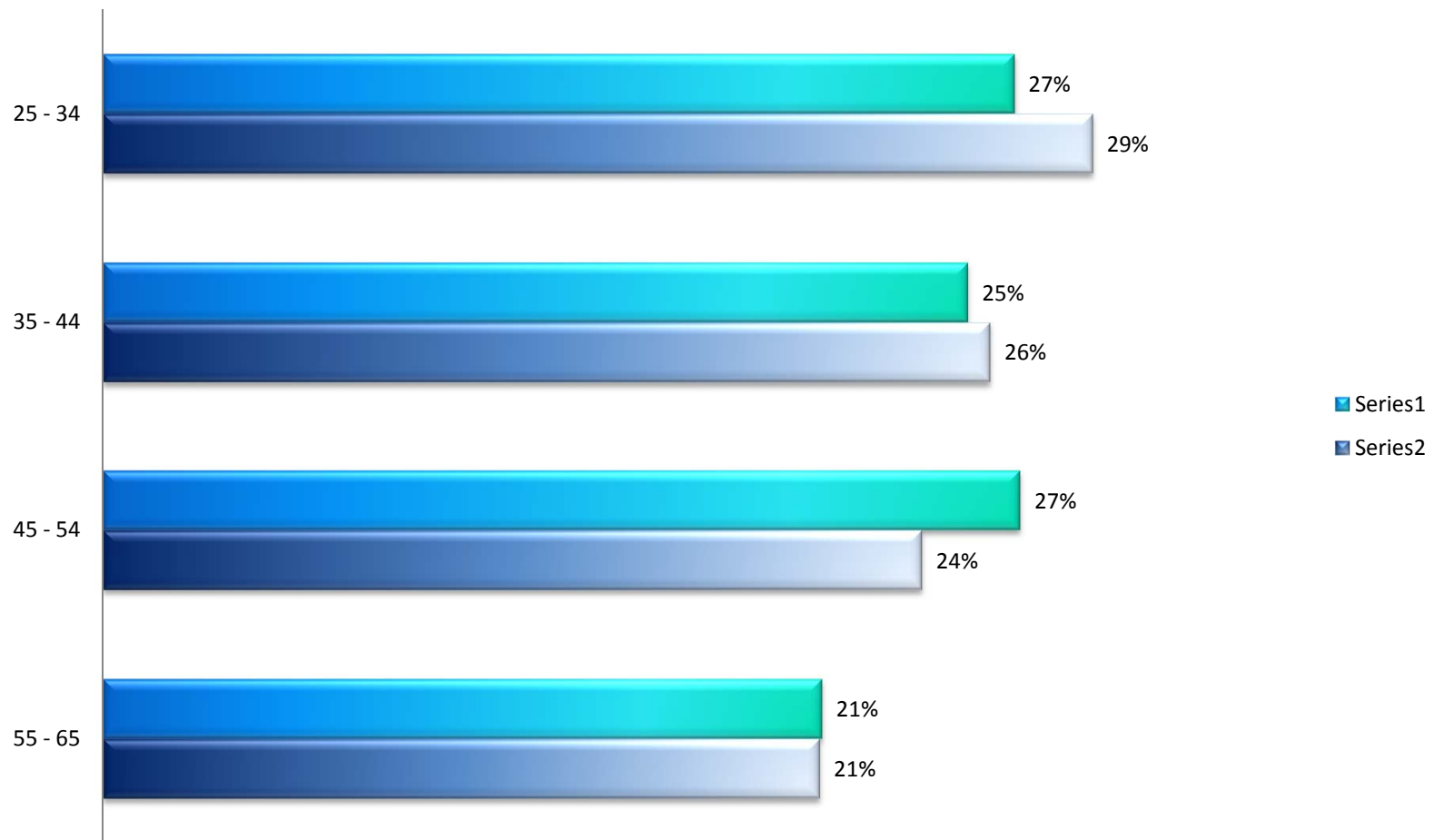


# How many children 18 or younger are currently living in your household?

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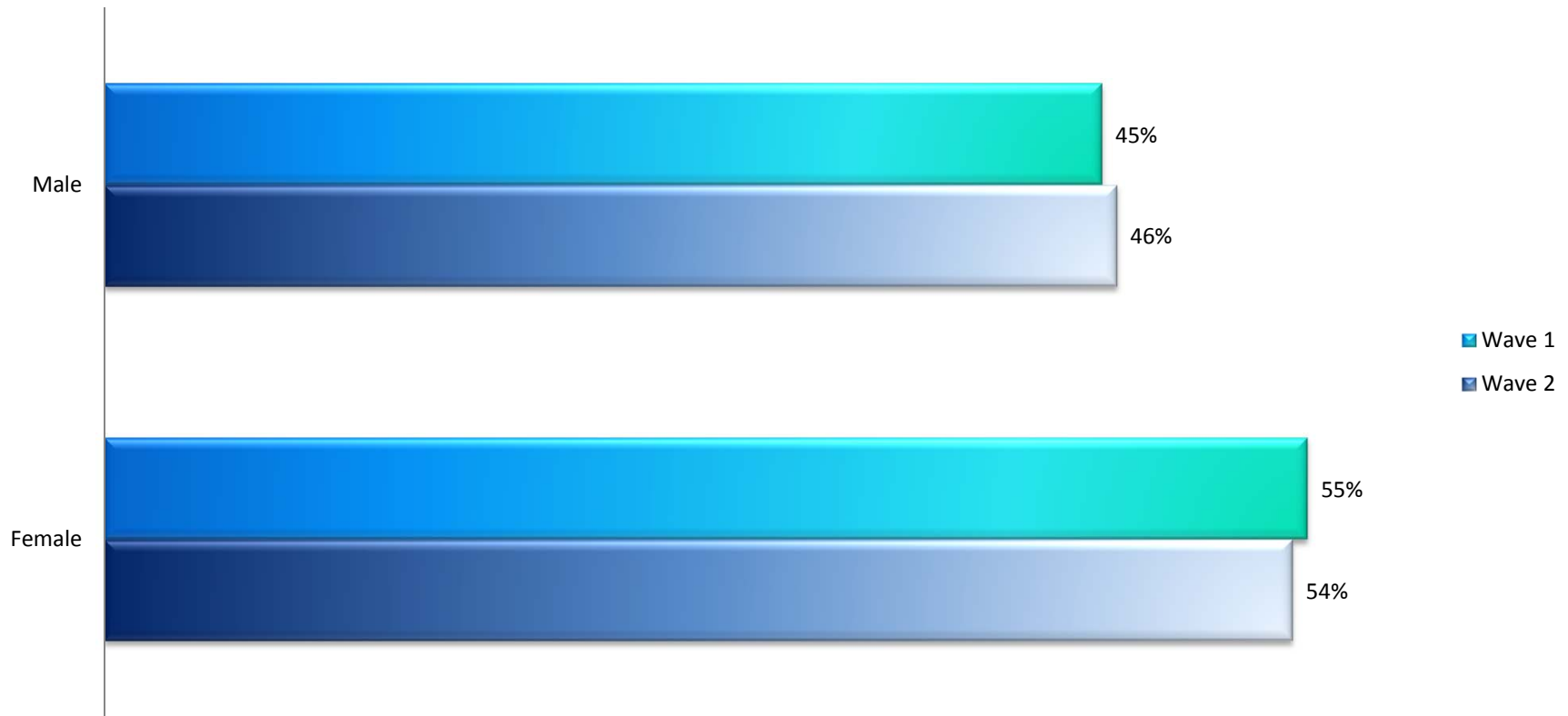


# Which age range fits you?



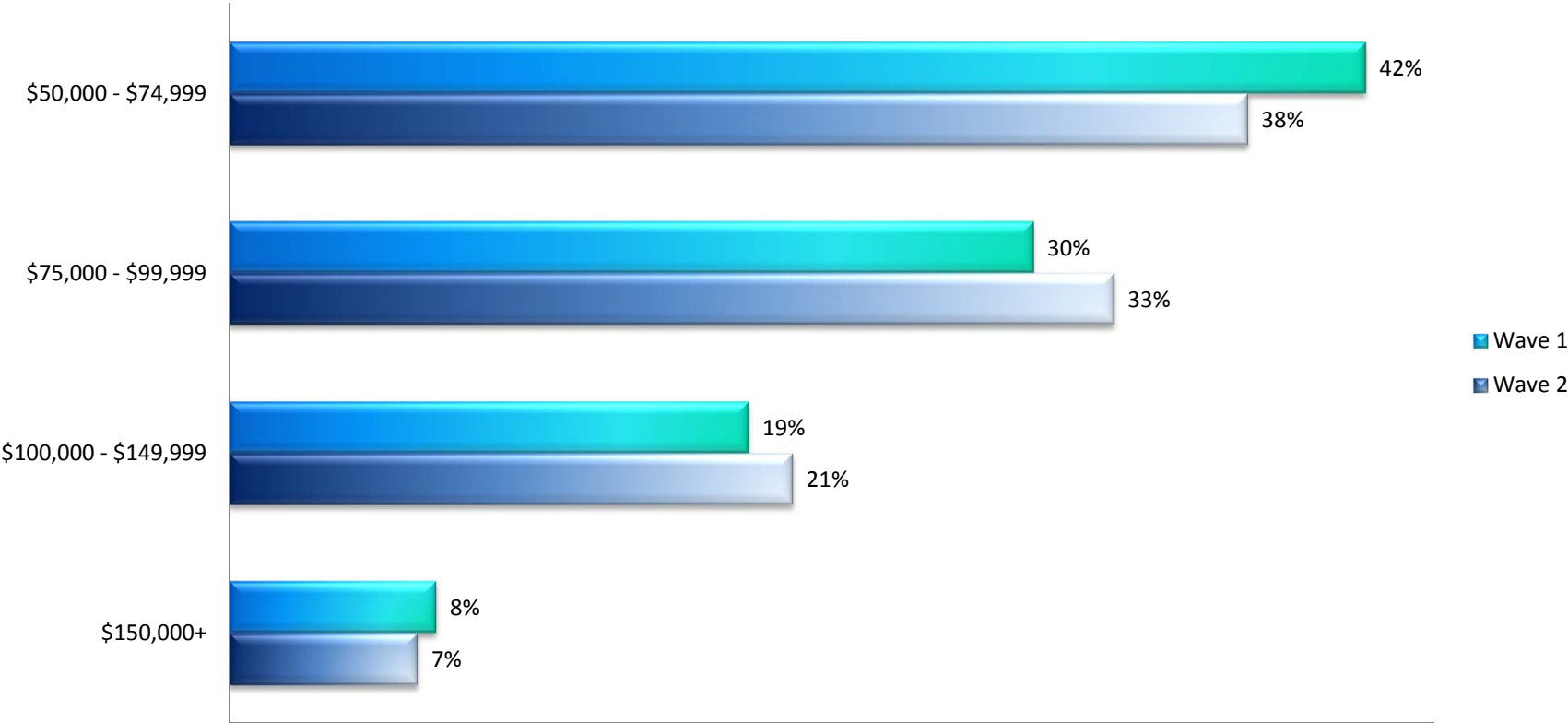
# Are you male or female?

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# Which category best fits your total household income in 2009 from all sources?



# Cities in the survey: Wave 1 & Wave 2

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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