



PARTNERSHIP

VISIT FLORIDA
Gulf Oil Spill Research I
Executive Summary Report

June 18, 2010

PURPOSE AND METHODOLOGY

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Ypartnership conducted a survey of the expected impact of the Gulf Oil Spill on the near-term travel intentions of Americans who reside in the North Central, South Central, Southeastern, Mid-Atlantic and New England states. Respondents were asked to opine on the following as they relate to the states of Texas, Louisiana, Mississippi, Alabama and Florida (and the most popular tourist destinations within these states):

- Awareness /impressions of the destinations (states and specific regions within those states) in which the Gulf Oil Spill has been reported;
- Awareness /impressions of the destinations (states and specific regions within those states) in which the Gulf Oil Spill has made landfall;
- Expectations with respect to the destinations (states and specific regions within those states) that are most likely to be affected by the Gulf Oil Spill in the days/weeks ahead;
- Travel intentions to the same destinations (states and specific regions within those states) prior to the Gulf Oil Spill versus travel intentions to the same destinations today;
- Likelihood of visiting the same destinations (states and specific regions within those states) on a leisure trip during the next 12 months;
- Demography.

The data for this study were collected June 4-13, 2010 through a 15-minute online survey conducted with a total of 1,286 pre-qualified consumers. The sample consisted of pre-qualified leisure travelers who reside in the North Central, South Central, Southeastern, Mid-Atlantic and New England states. Screening criteria for participation in the study were as follows:

- Active leisure travelers, defined as having taken at least one trip for leisure purposes requiring overnight accommodations during the past 12 months;
- Age 25-64*;
- Annual household income of \$50,000 or more;
- 50/50 male/female.

The margin of error for the statistical estimates appearing in this report is $\pm 2.8\%$ at the 95% level of confidence.

**Supplemental sample was also collected for those in the 65+ age category.*

EXECUTIVE SUMMARY



Overview

Ypartnership conducted this survey to gauge the expected impact of the Gulf Oil Spill on the near-term travel intentions of Americans who reside in the North Central, South Central, Southeastern, Mid-Atlantic and New England states. Respondents were asked to opine on the spill as they relate to leisure travel to the states of Texas, Louisiana, Mississippi, Alabama and Florida (and the most popular tourist destinations within these states).

It is important to note that this survey was fielded between the dates of June 4-13, 2010, during the time when oil was reported to be just miles from the Florida coast. Also during the fielding of this study, there were news reports of the oil residue washing up on the shores of Pensacola Beach.

Media Coverage of the Gulf Oil Spill

Respondents were well versed on the latest news of the Gulf Oil Spill, with more than half stating they were following reports of the Gulf oil spill “very closely,” and another four in ten following the events “casually”. Those over the age of 65 were most likely to keep a close eye on the news.

Television is the primary source of news about the oil spill (87%), followed by newspapers – both print and online (57% and 50%, respectively), radio (39%), and print and online magazines (14% and 12%, respectively). One in ten respondents reported receiving news about the Gulf Oil Spill from social media sites.

Not surprisingly, younger leisure travelers are more likely to follow online news sources, including social media sites, compared to their older counterparts.

Awareness of the Gulf Oil Spill

Nearly all respondents considered Louisiana to be the state most adversely affected by the oil spill and perceived it to be the most likely to have oil already washed up on its beaches, followed by Florida, Alabama and Mississippi. Eight in ten considered Florida to have been already affected, and nearly seven in ten felt that Florida already had oil on its shores.

When asked which states would end up with oil on their beaches before the crisis was over, Florida rose to the top of the list (95%), followed by Louisiana (89%), Mississippi (83%), and Alabama (82%).

Likelihood to Visit Now Versus Before the Spill

When asked to compare their likelihood of visiting the Gulf coast states today versus before the Gulf Oil Spill, three in ten respondents are less likely to visit Mississippi or Alabama now. One in four is less likely to visit Louisiana, and one in six is less likely to visit Georgia or Texas. One in ten is less likely to visit Florida.

Among Gulf coast beach destinations, the net percentage of respondents who indicated they were “less likely to visit” during the months of June, July and August of this year is as follows:

- Grand Isle area - 43%;
- Gulf Shores/Orange Beach area - 41%;
- Gulf Port/Biloxi area - 40%;
- **Pensacola area - 38%;**
- **Destin/Ft Walton Beach area - 37%;**
- **Panama City Beach area - 35%;**
- South Padre Island area - 32%;
- Galveston area - 32%;
- Corpus Christi area - 30%;
- Brunswick/Golden Isles area - 29%;
- **Sarasota/Bradenton area - 27%;**
- **Naples/Marco Island area - 27%;**
- **St. Petersburg/Clearwater area - 25%;**
- Savannah/Tybee Island area - 25%
- **The Florida Keys and Key West - 22%.**

Summer Travel Intentions

Respondents were relatively optimistic about their future leisure travel plans, however, with nearly two in three reporting vacations planned for this summer and one in eight still unsure of their travel plans for the summer season. One in four is not planning to take a summer vacation this year.

Among those taking a vacation during the months of June, July or August, half expect to take a beach vacation. Fewer than one in ten remains undecided as to their destination, and four in ten will not be vacationing at the beach. Aside from those who will be vacationing elsewhere and those who do not enjoy the beach, the main reason for not taking a beach vacation this summer is concern over the household budget/discretionary spending and the costs associated with travel. Only one in eight cited the Gulf Oil Spill as the reason for not vacationing at the beach this summer.

Four out of five travelers have not changed their plans to vacation at the beach as the result of the Gulf Oil Spill. Among those who did change their plans to vacation at the beach, seven in ten have decided on a beach destination other than in Florida. When asked to name their new beach destination, one in five named a Florida beach located along the East coast.