



PARTNERSHIP

VISIT FLORIDA
Gulf Oil Spill Research II
Executive Summary Report

August 13, 2010

Overview

Ypartnership conducted this survey as a continued effort 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 once again 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).

The second wave of the study was fielded between the dates of July 14-21, 2010, at a time when the beaches of Florida, Texas, Louisiana, Alabama and Mississippi had reportedly already been soiled by the oil spill.

Media Coverage of the Gulf Oil Spill

While nearly all respondents followed the news of the Gulf oil spill, six in ten were said to be following the news “very closely” – a significantly higher percentage over those surveyed in the first wave of the study (59% vs. 54%).

Television continued to be the primary source for news about the oil spill (86%), followed by newspapers – both print and online (65% and 52%, respectively), radio (36%), and print and online magazines (20% and 18%, respectively). One in ten (12%) respondents reported receiving news about the Gulf Oil Spill from social media sites.

As was the case in the first wave of the study, younger leisure travelers and those with children were more likely than their counterparts to follow online news sources, including social media sites.

Awareness of the Gulf Oil Spill

Five out of six respondents regard Florida as already having been affected by the Gulf oil spill – a significant increase over the first wave of the study (84% vs. 78%). While nearly all respondents continue to regard Louisiana (93%) as having been affected, there was a significant increase in the percentage that consider Alabama (73% vs. 65%), Mississippi (73% vs. 64%) and Texas (59% vs. 24%) to have already been affected by the oil spill.

When asked as to which states have already had oil wash up on the beaches, we found significant increases among those that reported Florida (80% vs. 68%), Alabama (68% vs. 53%), Mississippi (68% vs. 52%) and Texas (51% vs. 14%) as having oil on the beaches.

When asked to think ahead as to which states would end up with oil on their beaches before the crisis was over, Florida continues to be at top of the list (93%), followed by Louisiana (91%), Alabama (87%), Mississippi (86%) and Texas (83%).

Likelihood to Visit Now Versus Before the Spill

One in seven (14%) leisure travelers is still reluctant to visit Florida now versus before the Gulf oil spill – a significant decline from the first wave of the study where one in five (21%) indicated they were less likely to visit the state due to the incident in the Gulf.

Roughly three in ten leisure travelers report that they are less likely to visit Mississippi (29%), Alabama (28%) and Louisiana (27%) today than they were prior to the oil spill. Nearly two in ten (18%) are less likely to visit Texas.

The percentages of those respondents who indicated they were “less likely to visit” select Florida beach destinations during the months of July and August of this year are as follows:

- Pensacola area - 28%[†];
- Destin/Ft Walton Beach area - 27%[†];
- Panama City Beach area - 27%[†];
- Jacksonville Beach – 23%;
- Amelia Island/North Florida Beaches – 23%;
- Sarasota/Bradenton area - 22%[†];
- Naples/Marco Island area - 22%[†];
- St. Petersburg/Clearwater area - 21%[†];
- Miami Beach – 21%;
- Cocoa Beach/Space Coast – 20%;
- Ft. Lauderdale – 20%;
- St. Augustine/Ponte Vedra – 19%;
- The Florida Keys and Key West - 18%[†].

[†]Denotes a significant difference compared to the first wave of the study.

Summer Travel Intentions

When asked about their travel plans for the months of July and August, more than half (54%) reported plans to vacation during this period, and one in ten (10%) was still undecided.

Among those taking a vacation during the months of July or August, half (51%) indicated they had beach vacation plans and one in twenty (5%) had yet to decide on a vacation destination. Similar to those in the first wave of the study, concerns over the household budget/discretionary spending and the costs associated with travel were the predominant reasons for not taking a beach vacation. One in eight (12%) cited the Gulf Oil Spill as the reason for not vacationing at the beach this summer.

Nearly one in five travelers changed their plans to vacation at the beach as the result of the Gulf Oil Spill, consistent with the first wave of the study. Among those that changed their beach vacation plans, eight in ten switched away from a Florida beach destination and, of those, seven in ten chose a non-Florida vacation destination. *It is important to note the small sample size (n=less than 50) for the question of "cancelled and alternative beach destinations".*

Conclusions

It appears that the marketing efforts made to bring awareness to the issue of the Gulf oil spill during the months of June and July have helped to curb travelers' resistance to visiting Florida beaches. However, with one in seven leisure travelers still unlikely to visit the state due to the Gulf oil spill, marketing efforts must continue.

It is important to note that events such as Larry King's Gulf Telethon, the "Be the One" petition drive led by celebrities such as Sandra Bullock, Lenny Kravitz and Drew Brees, and press coverage of the First Lady Michele Obama's visit to Florida's Gulf coast drew much attention to the issue. As celebrity-endorsed events wane, additional marketing efforts must be implemented to keep Florida's beaches in the minds of travelers.

Purpose and Methodology

In this second wave of the Gulf Oil Spill Study, Ypartnership continued to gauge the 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 again 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 July 14-21, 2010 through a 15-minute online survey conducted with a total of 1,008 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 $\pm 3.1\%$ at the 95% level of confidence.

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