



PARTNERSHIP

VISIT FLORIDA
Gulf Oil Spill Research III
Executive Summary Report

October 14, 2010

Overview

Ypartnership conducted this third wave of the Gulf Oil Spill Study in a continued effort to gauge the expected impact of the 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 Gulf Coast states (Texas, Louisiana, Mississippi, Alabama and Florida) as well as a number of Gulf Coast beach destinations.

This wave was fielded between the dates of September 10-14, 2010 and it is important to note that just days after the commencing fielding, the deep-sea well was permanently “killed”. The first two waves of the study were fielded during the dates of June 4–14, 2010 and July 14-21, 2010.

Media Coverage of the Gulf Oil Spill

The results of this study show that active leisure travelers residing in the Central and Eastern regions of the U.S. continue to follow the news of the oil spill in the Gulf of Mexico, with nearly all (99%) travelers following the news to some degree. These travelers were most likely to have followed the news of the spill “very closely” during the second wave of the study (July 2010), reflecting a greater level of concern at that time.

Broadcast or cable television continued to be the most widely used sources for news of the Gulf oil spill, cited by about seven in eight (86%) – on par with the previous waves of the study. More than half (52%) turned to printed (61%) and online newspapers (52%) to gain information for details of the event, while nearly four in ten (39%) relied on radio news. Roughly two in ten obtained the news of the oil spill from printed or online magazines (20% and 17%, respectively) and one in eight (12%) received news of the spill through social media sites.

Interestingly, in this third wave, when asked how many barrels of oil continued to spill into the Gulf of Mexico, the majority of respondents were able to correctly assert that oil was no longer seeping into the Gulf.

Awareness of the Gulf Oil Spill

Travelers continue to perceive Louisiana as the Gulf state to be the most **affected** by the Gulf Oil Spill (93%). Yet, the proportions of those that consider Florida (79% vs. 84%) and Texas (50% vs. 59%) to be affected dropped significantly in the third wave of the study as compared to the second wave fielded in July 2010.

A considerable proportion of target travelers (seven in ten (72%) consider Florida to **already have oil on the beaches** – a significant decrease compared to the second wave of the study (72% vs. 80%). There were also significant declines in the proportion of those that believe Alabama (62% vs. 68%) and Texas (37% vs. 51%) to have had oil wash up on the beaches.

Similar to the first two waves of the study, Florida was at the top of the list when it came to the Gulf Coast states that travelers **expected to have oil wash up on the beaches before the end of the crisis**. There was, however, a decline in the proportion that expect Florida’s beaches to be affected by the spill, as compared to the second wave of the study (86% vs. 93%). There were also declines in the percentages of those that expect Louisiana (84% vs. 91%), Alabama

(77% vs. 87%), Mississippi (76% vs. 86%) and Texas (65% vs. 83%) to end up with oil on the beaches.

Likelihood to Visit Now Versus Before the Spill

While resistance to visiting the Gulf Coast has dropped to the lowest levels since June 2010 the news of the oil spill continues to affect travel plans to the area. Roughly one in five travelers report that they are less likely to visit Mississippi (23%), Alabama (23%) or Louisiana (20%) now than they were before the Gulf oil spill, while one in seven (14%) leisure travelers said the same of Texas. About one in ten (9%) is still less likely to visit Florida.

Florida's Panhandle beaches remain among the beaches travelers perceive as the most affected by the news of the spill. While resistance to visiting has continued to decline, more than one in five is still less likely to visit the Pensacola (20%), Destin/Ft. Walton (20%) and Panama City (19%) area beaches as a result of the Gulf oil spill. A similar proportion is less likely to visit the Amelia Island (18%) and Jacksonville Beach (17%) areas – an interesting statistic considering their location. Leisure travelers show the least resistance to visiting the Florida Keys and Key West (12%).

The percentages of those respondents who indicate they were "less likely to visit" select Florida beach destinations during the remainder of this calendar year are as follows:

- Pensacola area - 20%[†];
- Destin/Ft Walton Beach area - 20%[†];
- Panama City Beach area - 19%[†];
- Jacksonville Beach – 17%[†];
- Amelia Island/North Florida Beaches – 18%[†];
- Sarasota/Bradenton area - 17%[†];
- Cocoa Beach/Space Coast – 16%[†];
- Naples/Marco Island area - 15%[†];
- St. Petersburg/Clearwater area - 15%[†];
- Miami Beach – 15%[†];
- St. Augustine/Ponte Vedra – 15%[†];
- Ft. Lauderdale – 14%[†];
- The Florida Keys and Key West - 12%[†].

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

Travel Intentions

Nearly six in ten (57%) active leisure travelers report intentions of taking a vacation during the remainder of this calendar year, and one in seven (14%) has yet to decide if they would do so. Comparatively, more than half (53%) took a vacation during the months of October, November or December last year.

Among those with intentions of vacationing during the remainder of this calendar year, nearly half (48%) indicate that they plan on taking a beach vacation during this period. The number one reason for not taking a beach vacation during the remainder of this calendar year was cited by travelers already having plans to vacation elsewhere or at another time (27%), followed by budget concerns (24%). Roughly one in six report not having enough time (18%) to take a beach vacation, airfares are too expensive (17%) and travel, in general, is too expensive (16%). One in seven (14%) has concerns about the economy or their own job, while one in eight states that air travel is too big of a hassle (12%) and gas prices are too high (12%). One in ten (10%) reports concerns over areas affected by the Gulf oil spill as a reason to not take a beach vacation during the remainder of this calendar year.

Among those with upcoming beach vacation plans, two in ten (20%) report having changed their original beach destination as the result of the Gulf oil spill – similar results to the first and second waves of the study covering the months of June through August 2010.

More than one in seven (15%) active leisure travelers report intentions to vacation in Florida during the next three months, while one in twenty state intentions of visiting Texas (5%), Louisiana (5%), Alabama (5%) or Mississippi (5%) during this time. Nearly six in ten (57%) report intentions of visiting Florida next year and approximately one in four (28%) indicate they will visit in the next two years.

Among those planning to take a beach vacation during the remainder of this calendar year, more than half (53%) intend to take a beach vacation with their spouse or significant other – a significantly higher proportion than those that planned to vacation during the months of July and August 2010. Significantly fewer intend to travel with their spouse and children during this period compared to those with beach vacation plans during the months of July and August 2010 (27% vs. 35%).

Leisure travelers have been consistent in terms of the length of their beach vacation scheduled some time during the remainder of this calendar year. Roughly one in four expect a one-to-three day stay, while about four in ten plan to spend four-to-six days at the beach. One in three plans to spend a week or more at their beach destination.

Conclusion

The Deepwater Horizon explosion on April 20th, categorized as “the worse ecological disaster in U.S. history”, continues to affect perceptions of, and interest in, visiting the State of Florida. The results of the research summarized in this document reveal that while resistance to visiting Florida’s beaches has significantly dropped, misperceptions as to affected areas continue, signifying a need to continue marketing efforts to counteract the misconceptions of Florida’s potential visitors.

Purpose and Methodology

The primary purpose of this study was to continue to gauge the expected impact of the Gulf Oil Spill on near-term travel intentions of Americans who reside in the North Central, South Central, Southeastern, Mid-Atlantic and New England states. As was the case in the first two waves of the study, respondents were asked to opine on the following as they relate to the Gulf Coast states 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 third wave of the study were collected September 10-14, 2010 through a 15-minute online survey conducted with a total of 1,002 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.

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