



Oil Spill Survey Research Report

Regional Wave 1

June 30, 2010

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Research Overview

Background

- ◆ On April 20, 2010, there was an explosion and subsequent fire on an oil rig in the Gulf of Mexico. Shortly thereafter, the rig, located 50 miles off the coast of Louisiana, began leaking oil. The Louisiana Office of Tourism wished to assess the impact of the oil spill on perceptions of and interest in visiting Louisiana.

Research Objectives

- ◆ Measure current perceptions of Louisiana as a leisure destination
- ◆ Measure intent to visit in the next 12 months

Methodology

- ◆ MDRG used an Internet panel for the purpose of data collection. The survey was available on MDRG’s secure website from June 18-21, 2010, and took an average of 6.5 minutes to complete.

Sample

- ◆ Respondents were recruited from the e-Rewards Consumer Internet Panel. In order to reflect the target consumer, they were screened to ensure they:
 - Are At least 25 years old
 - Have household incomes of \$50,000 or more
 - Take at least one trip per year that includes a paid overnight stay
 - Either share equally or are the primary decision maker when making leisure travel plans
 - Live in one of the six target markets (see table at right)
 - Are not employed in the travel, market research, marketing or advertising industries
- ◆ A total of 903 regional respondents completed the survey.

Market	Surveys
Dallas	366
Houston	267
San Antonio	108
Austin	79
Mobile/Pensacola	69
Hattiesburg/Laurel	14
TOTAL	903

Key Findings

Key Findings

Overview

- ◆ In large percentages, respondents in each of the regional markets indicated that they are closely following the oil spill story, and most have concluded that it has severely devastated Louisiana, and that it's something the state will have to contend with for years.
 - As one might expect given that they are located on the Gulf, Mobile and Pensacola respondents are following the story most closely, and have the most negative perceptions of the damage to Louisiana.
- ◆ The oil spill has had negative effects on 2 of Louisiana's industries – seafood and tourism.
 - Many respondents have misgivings about Louisiana's seafood.
 - Some of them have cancelled or postponed trips to the state.
 - A sizeable minority of unlikely visitors claim that they would be more likely to visit if the oil spill had not happened.
- ◆ Perceptions of Louisiana on 2 of the 3 most important leisure travel attributes are particularly low.
 - Regional respondents gave Louisiana low scores for "Having a clean and unspoiled environment" and "Being safe and secure."

Details

- ◆ **Likely visitation to Louisiana is high relative to other Gulf Coast states, and would be even higher were it not for the oil spill.**
 - Louisiana (38%) and Florida (46%) receive significantly higher "top box" (4-5 on 5-point likelihood scale) likelihood to visit scores than Alabama (15%), Mississippi (14%), and Texas (13%).
 - However, 17% of respondents with plans to visit Louisiana either cancelled or postponed trips because of the oil spill.
- ◆ **Perceptions that the oil spill has affected Louisiana's leisure activities has some regional travelers saying they are less likely to plan a visit.**
 - If *Louisiana seafood* and the *Louisiana coast were not contaminated with oil*, nearly one-third of unlikely visitors say they would be more likely to visit (32% and 31% "top box" – 4-5 on 5-point agreement scale, respectively).
 - A sizeable minority (28% "top box") of unlikely visitors agreed that they would be more likely to visit if *Louisiana wildlife – birds, alligators, etc. – could be seen as they were before the oil spill*.
 - About one-fifth of unlikely visitors gave "top box" agreement to being more likely to visit if the oil spill had not *damaged biking and hiking trails* (21%), and *closed waterways* (17%), *swamp tours* (17%), and *deep sea fishing areas* (16%).

Key Findings

Details

- ◆ **Fairly large percentages of regional travelers have misperceptions about Louisiana seafood – particularly oysters.**
 - More than half (58%) of respondents believe that “Louisiana oyster beds are contaminated from the oil spill,” and another 32% are not sure about the statement.
 - The widespread misperception is probably due to the fact that the oyster supply has been depleted. In reality, if the oysters are harvested, they will become contaminated, but the actual oyster beds should be okay unless oil plumes reach them.
 - Almost half of respondents either believe or are not sure if “Restaurants that use Louisiana seafood are putting their customers at risk” or if “The cost of Louisiana shrimp is higher because oil has to be cleaned from them before they can be sold” (48% and 46%, respectively).
 - There is confusion among some respondents as to whether “Regulations are in place to ensure that Louisiana does not sell seafood contaminated from the oil spill” (26% are not sure).
 - About 1 out of 10 (10%) respondents believe that “Commercial fishing is allowed in areas where oil is present.”

- ◆ **The overarching sentiment among regional travelers is that the oil spill damage to Louisiana is severe and it will last for years.**
 - Almost 9 out of 10 (88%) respondents believe that Louisiana will be affected by the oil spill for at least 2 years.
 - Nearly half of respondents (43%) view the oil spill as “more” devastating to Louisiana than the 2005 hurricanes, and another 20% believe it is “about the same.”

- ◆ **Louisiana receives very low scores on 2 leisure travel attributes that are important to regional travelers.**
 - Respondents gave the highest importance ratings to “Safe and secure” (4.43 average on 5-point importance scale); however, Louisiana is not perceived as “safe and secure” (3.19 average on 5-point performance scale).
 - The leisure travel attribute, “Clean and unspoiled environment” was rated as highly important (3.96 average), but respondents do not believe that Louisiana can offer that right now. In fact, “Clean and unspoiled” receives the lowest ratings (2.85 on 5-point performance scale) of the attributes tested.

Intent to Visit

Intent to Visit

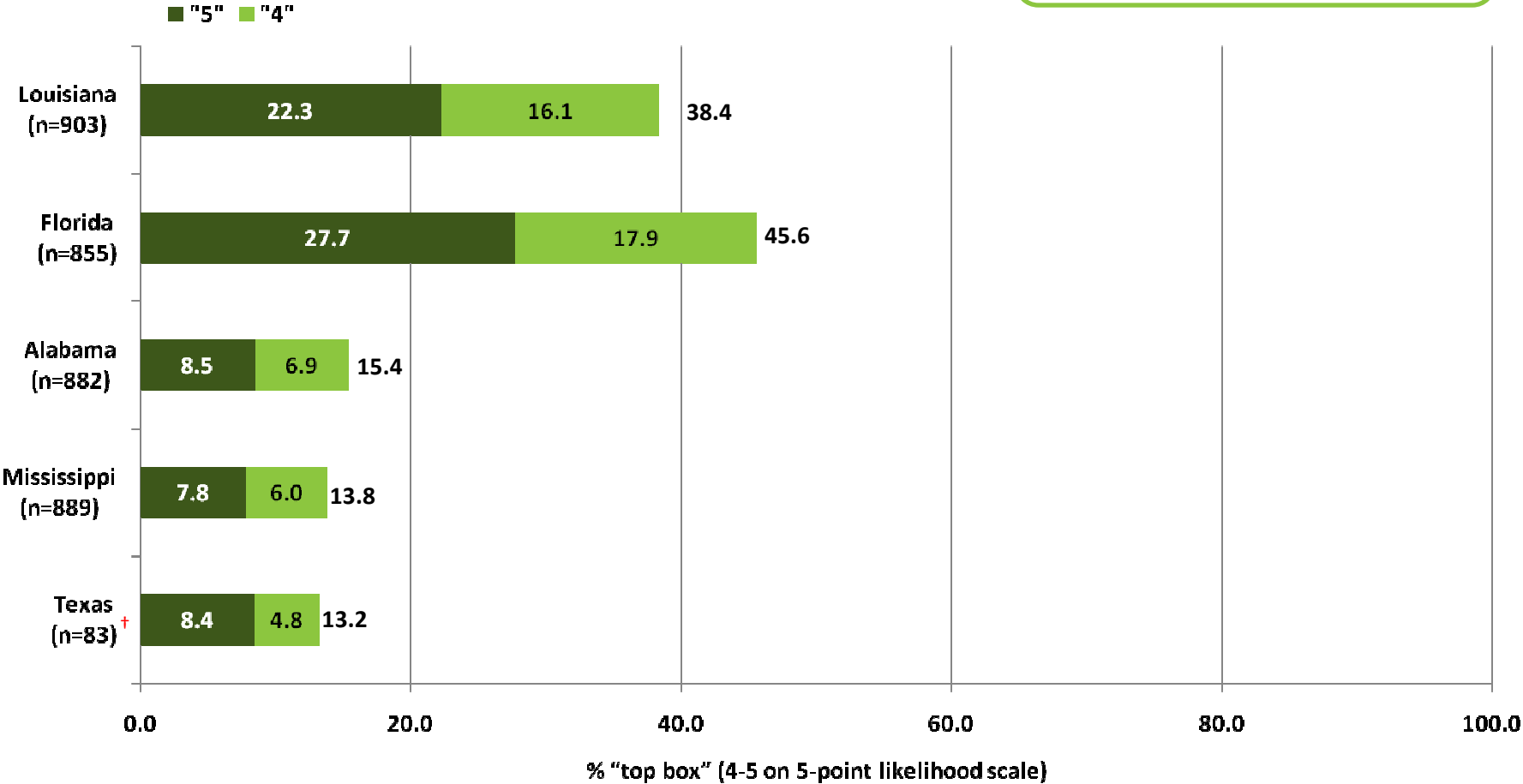
Introduction

- ◆ Respondents used a 5-point scale to rate their likelihood of visiting Louisiana as well as 4 other Gulf Coast states:
 - Alabama
 - Florida
 - Mississippi
 - Texas
- ◆ Results are presented for each state among respondents who do not live in the state.
 - Louisiana results are also presented by market.

Intent to Visit Gulf Coast States

Base: Respondents who do not live in the state

Survey respondents, 91% of whom are from Texas, are most likely to take leisure trips to Florida and Louisiana.



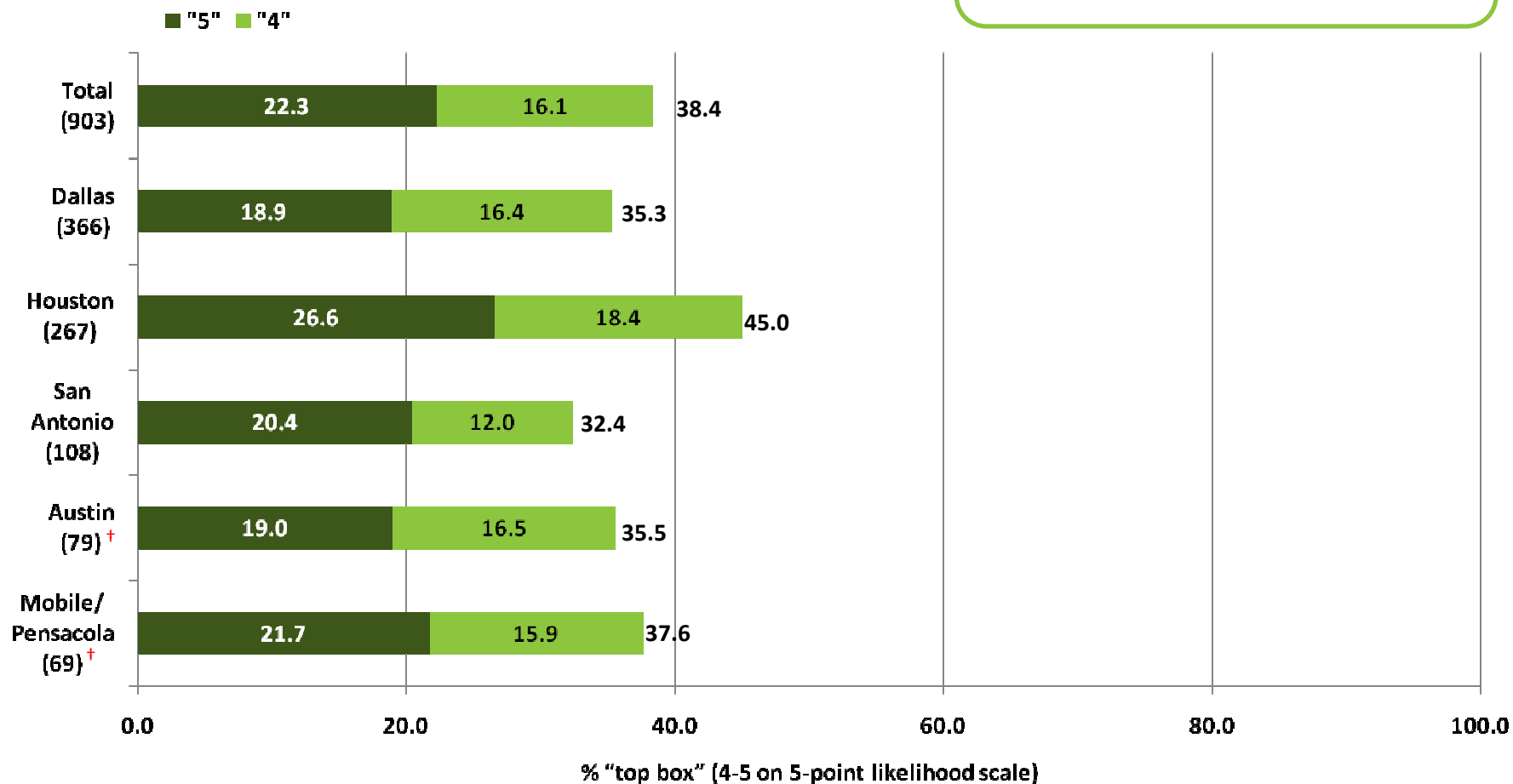
† Caution: small base size

Q2. Using a scale from 1 to 5 where "1" means not at all likely and "5" means extremely likely, please pick any number from 1 to 5 to indicate how likely you are to visit the following states for leisure or pleasure in the next 12 MONTHS:

Intent to Visit Louisiana

BY MARKET

Houston respondents reported the highest likelihood to visit Louisiana in the next 12 months, significantly more likely than respondents from Dallas and San Antonio.



† Caution: small base size

NOTE: The sample size in Hattiesburg/Laurel (n=14) is too small to report. As such, those respondents are reported in the total only.

Q2. Using a scale from 1 to 5 where "1" means not at all likely and "5" means extremely likely, please pick any number from 1 to 5 to indicate how likely you are to visit the following states for leisure or pleasure in the next 12 MONTHS: LOUISIANA

Effect of Oil Spill on Travel Plans to Louisiana

Effect of Oil Spill on Travel Plans to Louisiana

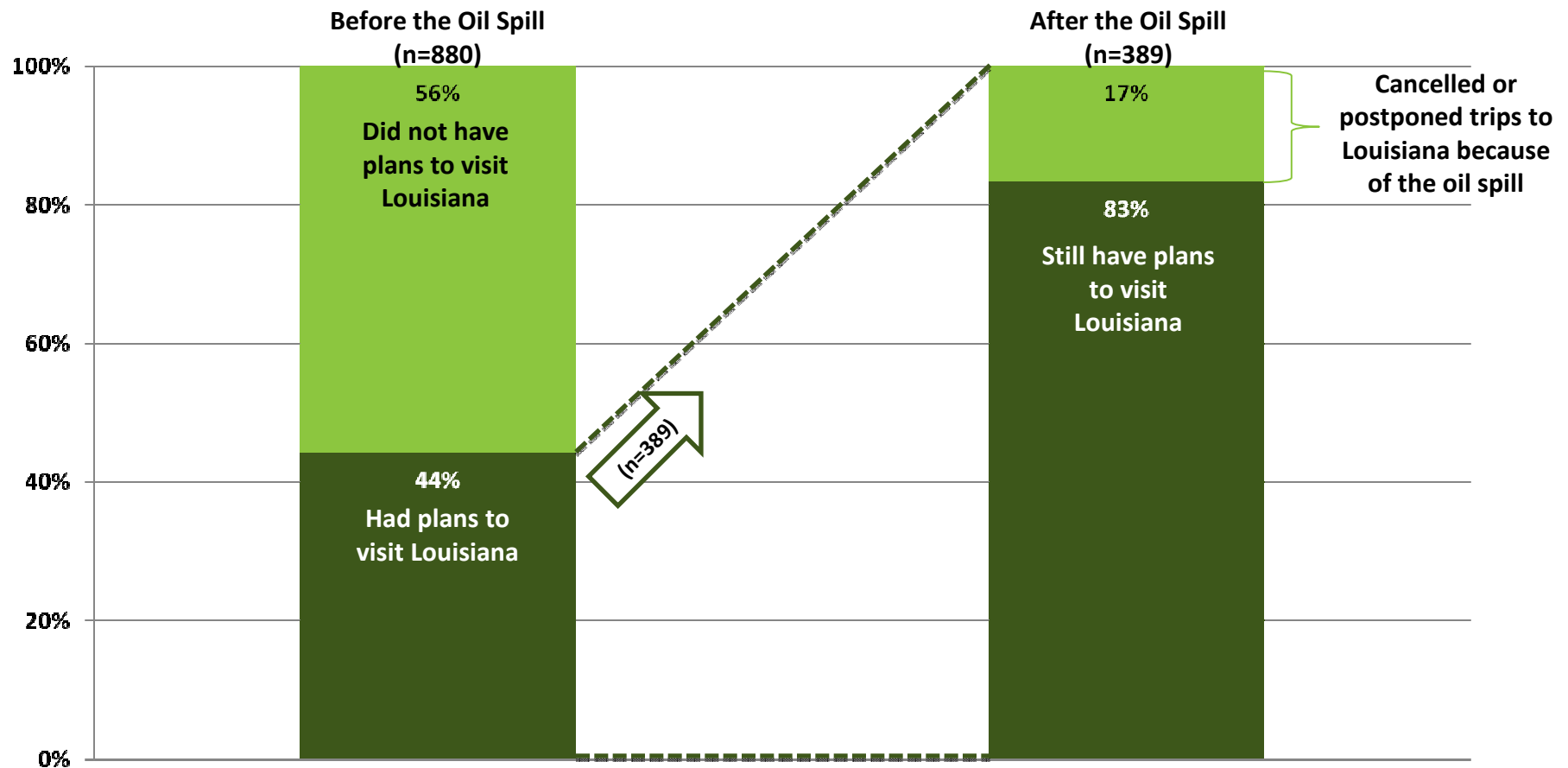
Introduction

- ◆ Respondents were asked to indicate how the oil spill in the Gulf had affected their leisure travel plans to Louisiana. They could select from the following list of options:
 - The oil spill caused me to plan a leisure trip to Louisiana.
 - The oil spill caused me to cancel a leisure trip to Louisiana.
 - The oil spill caused me to postpone a leisure trip to Louisiana.
 - The oil spill caused me to change the areas or attractions to visit on my leisure trip to Louisiana.
 - The oil spill had no impact on my plans to take a leisure trip to Louisiana.
- ◆ The effect of the oil spill on leisure travel plans to Louisiana was calculated as follows:
 1. The number/percentage of respondents likely to visit Louisiana prior to the oil spill
 2. Plus the number/percentage of respondents who planned trips to Louisiana because of the oil spill
 3. Minus the number/percentage of respondents who cancelled or postponed trips to Louisiana because of the oil spill

Effects of oil spill on leisure travel plans measured in 3 steps:	Number	Percentage
1. Had Plans to Visit before the Oil Spill	389	43.1%
2. Made Plans to Visit after the Oil Spill	+23	+2.5%
3. Cancelled or Postponed Plans to Visit after the Oil Spill	-65	-7.2%
Have Plans to visit	347	38.4%

Effect of Oil Spill on Travel Plans to Louisiana

About 17% of respondents with plans to visit Louisiana prior to the oil spill either cancelled or postponed trips to Louisiana because of the oil spill.



NOTE: Respondents who made plans to visit Louisiana after the oil spill (n=23) are excluded from the analysis.

Q2. Using a scale from 1 to 5 where "1" means not at all likely and "5" means extremely likely, please pick any number from 1 to 5 to indicate how likely you are to visit the following states for leisure or pleasure in the next 12 MONTHS: LOUISIANA
Q10. How has the oil spill affected your leisure travels to Louisiana? [Chart includes respondents who said that they either cancelled or postponed a leisure trip to Louisiana because of the oil spill.]

Impact of Messaging on Intent to Visit Louisiana

Impact of Messaging on Intent to Visit Louisiana

Introduction

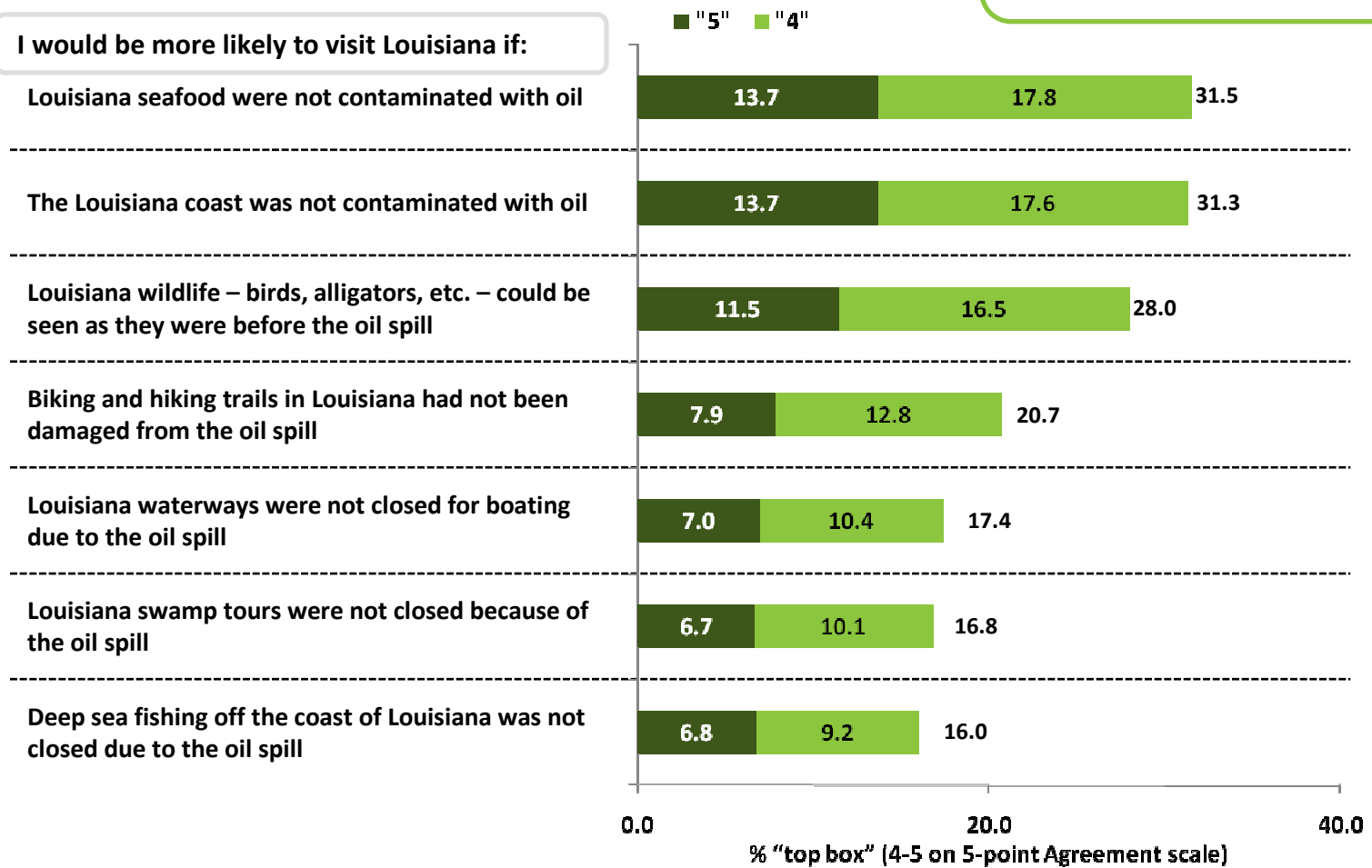
- ◆ In order to understand the effect of the oil spill on respondents' decisions to not visit Louisiana in the next 12 months, those who rated their likelihood to visit as low (1-3 on 5-point likelihood scale) were asked if they would be more likely to visit Louisiana if:
 - A. The Louisiana coast was not contaminated with oil
 - B. Louisiana seafood were not contaminated with oil
 - C. Deep sea fishing off the coast of Louisiana was not closed due to the oil spill
 - D. Louisiana swamp tours were not closed because of the oil spill
 - E. Louisiana wildlife – birds, alligators, etc. – could be seen as they were before the oil spill
 - F. Louisiana waterways were not closed for boating due to the oil spill
 - G. Biking and hiking trails in Louisiana had not been damaged from the oil spill

Impact of Messaging on Intent to Visit Louisiana

Base: Respondents NOT likely to visit Louisiana (1-3 on 5-point scale) (n=556, 62% of Respondents)

About 3 out of 10 respondents who do not plan to visit Louisiana said that they would be more likely to visit if Louisiana seafood, its coast and wildlife were not contaminated from the oil spill.

I would be more likely to visit Louisiana if:



Q9. Earlier you indicated that you are not likely to visit Louisiana in the next 12 month. Please use the scale below to indicate your agreement with the list of statements about visiting Louisiana. I would be more likely to visit Louisiana if...

Perceptions of Oil Spill on Louisiana Seafood

Perceptions of Oil Spill on Louisiana Seafood

Introduction

- ◆ In order to measure current perceptions of Louisiana seafood, respondents were presented with a list of statements about Louisiana seafood, and asked whether they believed the statement, did not believe it or were not sure. The statements are:
 - A. Louisiana oyster beds are contaminated from the oil spill
 - B. Commercial fishing is allowed in areas where oil is present
 - C. Restaurants that use Louisiana seafood are putting their customers at risk
 - D. The cost of Louisiana shrimp is higher because oil has to be cleaned from them before they can be sold
 - E. Regulations are in place to ensure that Louisiana does not sell seafood contaminated from the oil spill
- ◆ All of the statements are false, except “E.” An explanation about each statement is presented on the next page.

Perceptions of Oil Spill on Louisiana Seafood

Base: Total Respondents
(n=903)

The biggest misperception about Louisiana seafood is that oyster beds are contaminated.

	Do not believe	Not sure	Believe to be true	Percent Incorrect Perceptions	The Truth:
Louisiana oyster beds are contaminated from the oil spill (FALSE)	10.6 ☑	31.8 ⊗	57.6 ⊗	89	Louisiana oyster beds will remain clean as long as oil plumes do not reach the bottom of the Gulf where they are located.
Restaurants that use Louisiana seafood are putting their customers at risk (FALSE)	52.4 ☑	23.9 ⊗	23.7 ⊗	48	Contaminated areas of the Gulf are closed to commercial fishing, and therefore, contaminated seafood is not available for purchase.
The cost of Louisiana shrimp is higher because oil has to be cleaned from them before they can be sold (FALSE)	54.0 ☑	22.5 ⊗	23.5 ⊗	46	The cost of Louisiana shrimp is higher, but it's due to lower production not cleaning costs.
Regulations are in place to ensure that Louisiana does not sell seafood contaminated from the oil spill (TRUE)	9.0 ⊗	25.6 ⊗	65.4 ☑	35	Regulations are in place to ensure that Louisiana does not sell seafood contaminated from the oil spill
Commercial fishing is allowed in areas where oil is present (FALSE)	71.3 ☑	18.4 ⊗	10.3 ⊗	29	As of June 1, 31% of the Gulf of Mexico was closed to commercial fishing – an area larger than the oil spill.

Oil has been spilling from an oil well since an April 20, 2010 fire and explosion on an oil rig located in the Gulf of Mexico about 50 miles off the coast of Louisiana.

Q6. Considering the information above and anything else you may have heard about the oil spill, please indicate whether you believe each of the following statements about Louisiana seafood.

☑ Correct
⊗ Incorrect

Perceptions of Severity of Oil Spill on Louisiana

Perceptions of Duration of Oil Spill's Effect on Louisiana

The majority of regional respondents believe the oil spill's affect on Louisiana is long-term – 88% indicated that the impact will last at least 2 years.

How long do you think the oil spill's effects will be felt in Louisiana?

- 10 years+
- 5-10 years
- 2-5 years
- 1 year
- < 1 year



[†] Caution: small base size

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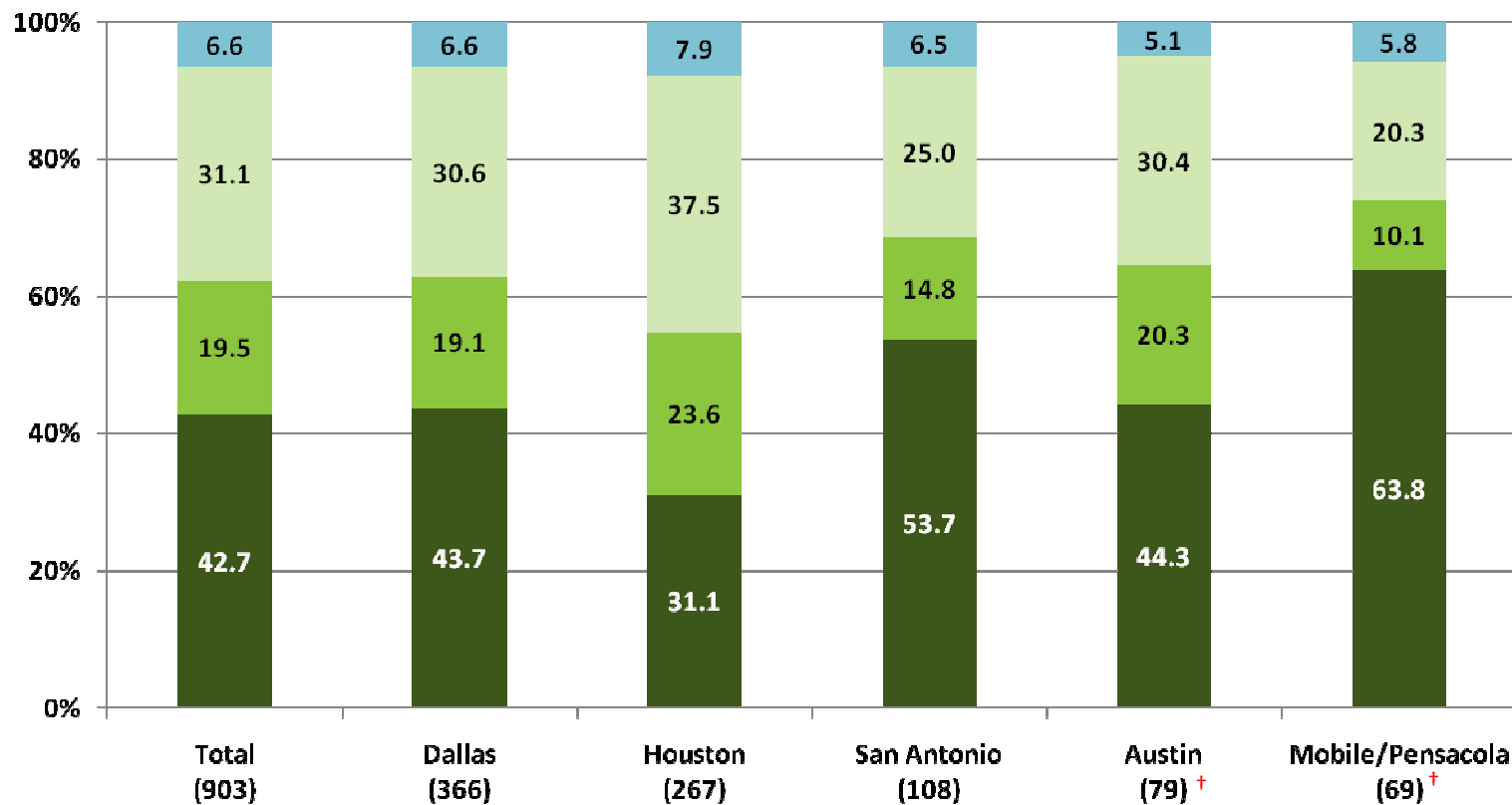
Q11. Based on everything you know about the oil spill, how long do you think Louisiana will be affected?

Perception of Oil Spill Devastation Compared to 2005 Hurricanes Devastation

A large percentage (42.7%) of regional respondents believe that the oil spill is worse for Louisiana than the 2005 hurricanes, and another one-fifth (19.5%) perceive that it's just as bad.

Compared to the 2005 hurricanes, the devastation caused by the oil spill is:

- Not Sure
- Less
- About the same
- More



† Caution: small base size

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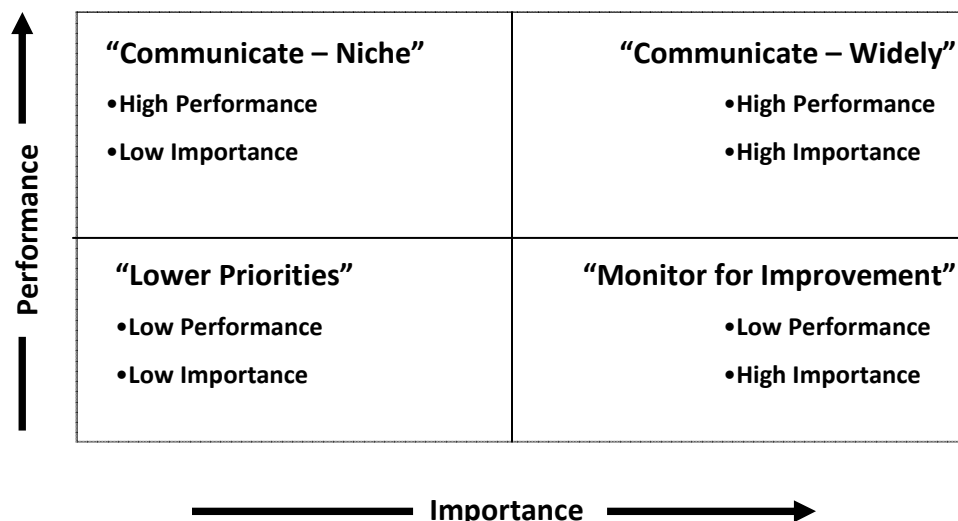
Q8. In the summer of 2005, as you probably remember, Hurricanes Katrina and Rita hit Louisiana. Compared to what you know about the devastation to Louisiana caused by those hurricanes, do you think the devastation to Louisiana caused by the oil spill is:

Importance of Leisure Travel Attributes and Perceptions of Louisiana

Leisure Travel Attributes

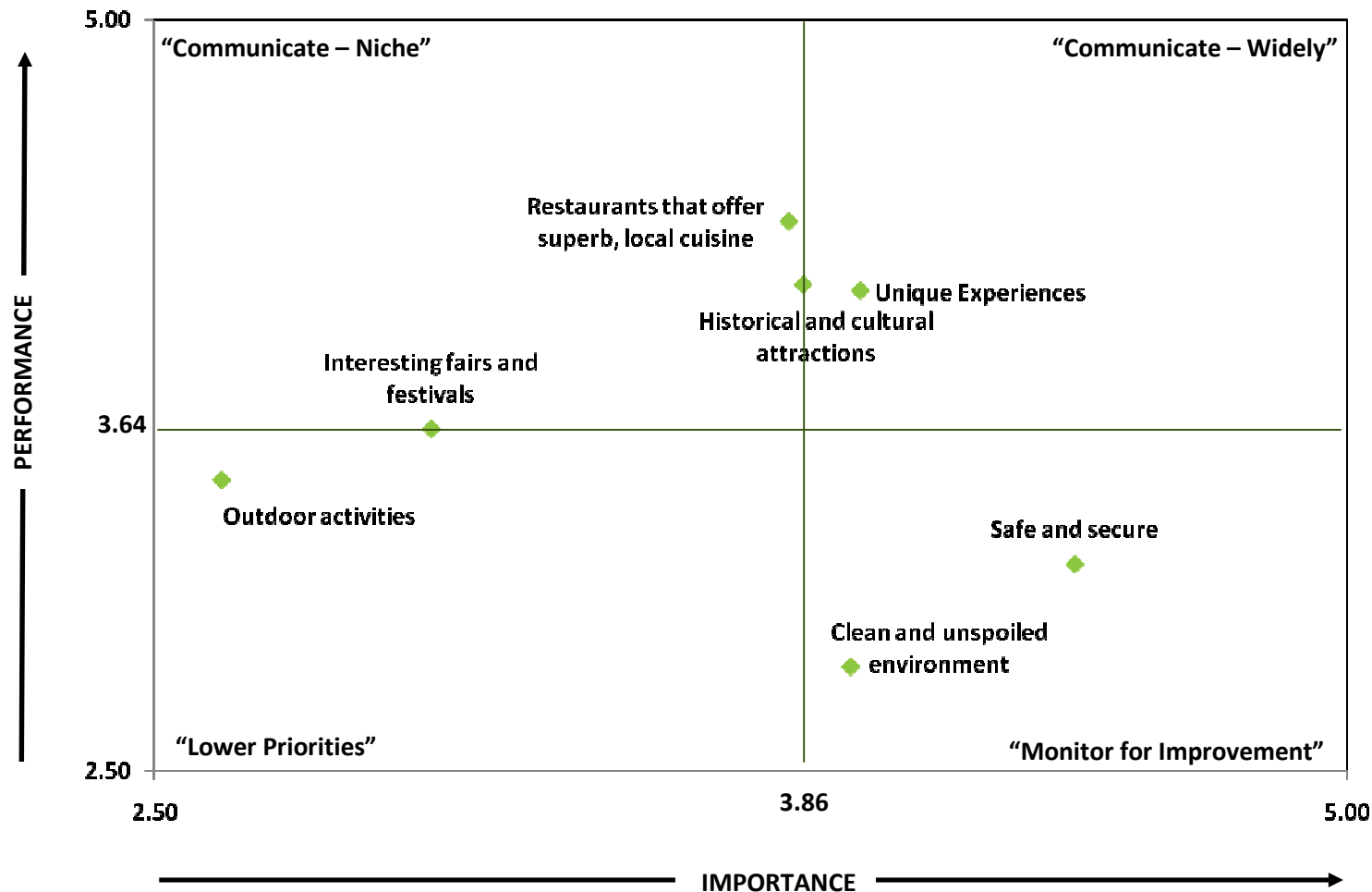
Introduction

- ◆ Respondents rated the importance of 7 leisure travel attributes and Louisiana’s performance on the attributes.
- ◆ The attributes are:
 - A. Has a clean and unspoiled environment
 - B. Has restaurants that offer superb, local cuisine
 - C. Has a variety of outdoor activities such as hunting, fishing, and camping
 - D. Is safe and secure
 - E. Has a variety of historical and cultural attractions
 - F. Has unique experiences that you cannot get anywhere else
 - G. Has interesting fairs and festivals
- ◆ Average Importance and Performance scores were used to map the attributes into a four-quadrant grid where Importance is the horizontal axis and Performance is the vertical axis. The lines drawn down the center and from left to right are the median scores for Importance and Performance.



Importance of Leisure Travel Attributes and Perceptions of Louisiana

Total Respondents (n=903)



- A. Has a clean and unspoiled environment
- B. Has restaurants that offer superb, local cuisine
- C. Has a variety of outdoor activities such as hunting, fishing, and camping
- D. Is safe and secure
- E. Has a variety of historical and cultural attractions
- F. Has unique experiences that you cannot get anywhere else
- G. Has interesting fairs and festivals

Q3. The table below contains a list of phrases that could be used to describe a leisure travel destination. Think for a moment about when you are planning a leisure trip. Using a scale from 1 to 5 where "1" means the phrase is not at all important and "5" means the phrase is extremely important, please pick any number from 1 to 5 to indicate how important the phrase is to you in terms of what you want from a leisure destination.

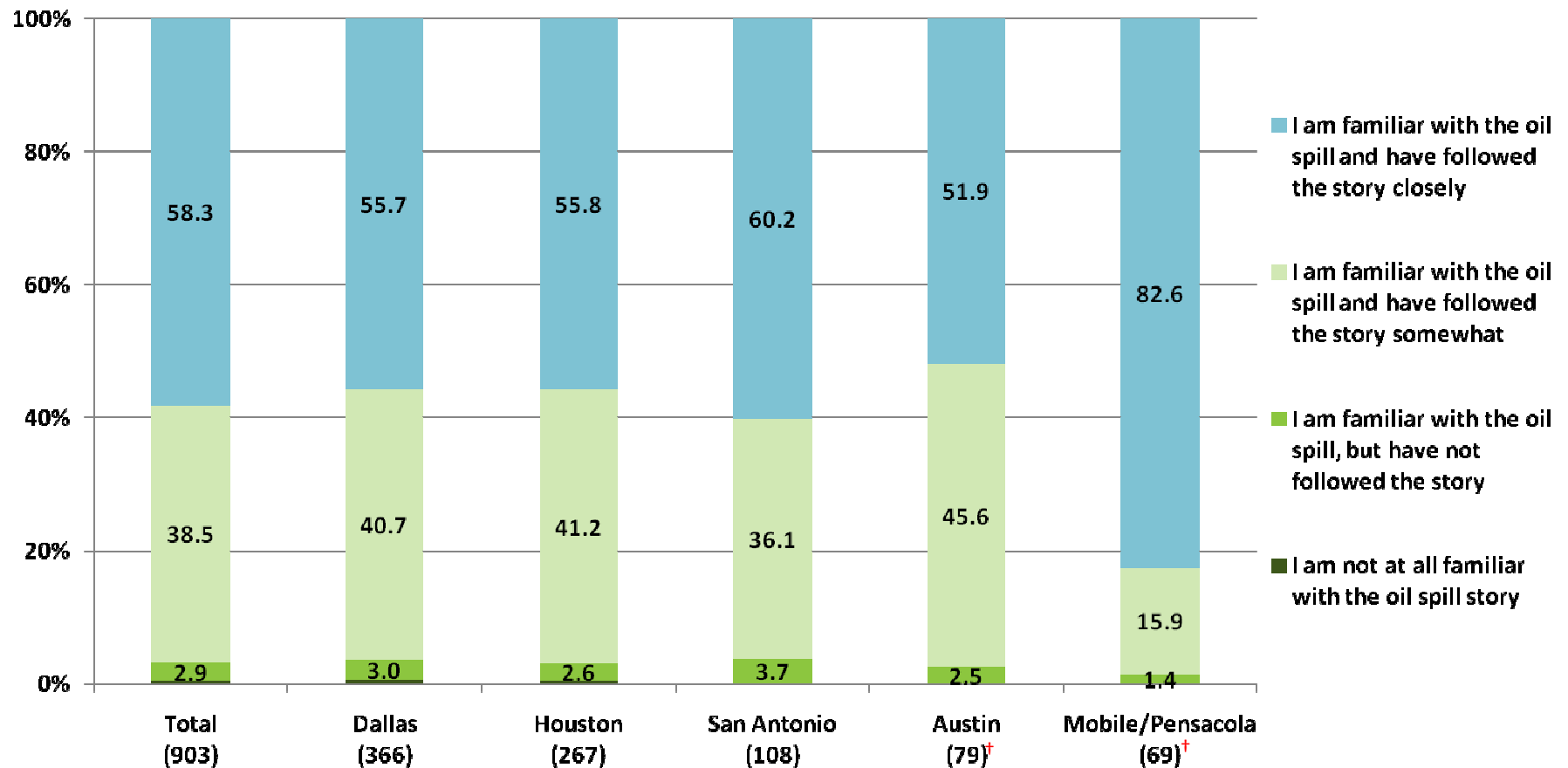
Q4. Using a scale from 1 to 5 where "1" means you do not agree at all and "5" means you strongly agree, please pick any number from 1 to 5 to indicate the extent to which you agree with the following statements about Louisiana TODAY.

The Oil Spill Story

Familiarity with Oil Spill Story

BY MARKET

As one would expect, the majority (58%) of regional respondents are following the oil spill story closely.



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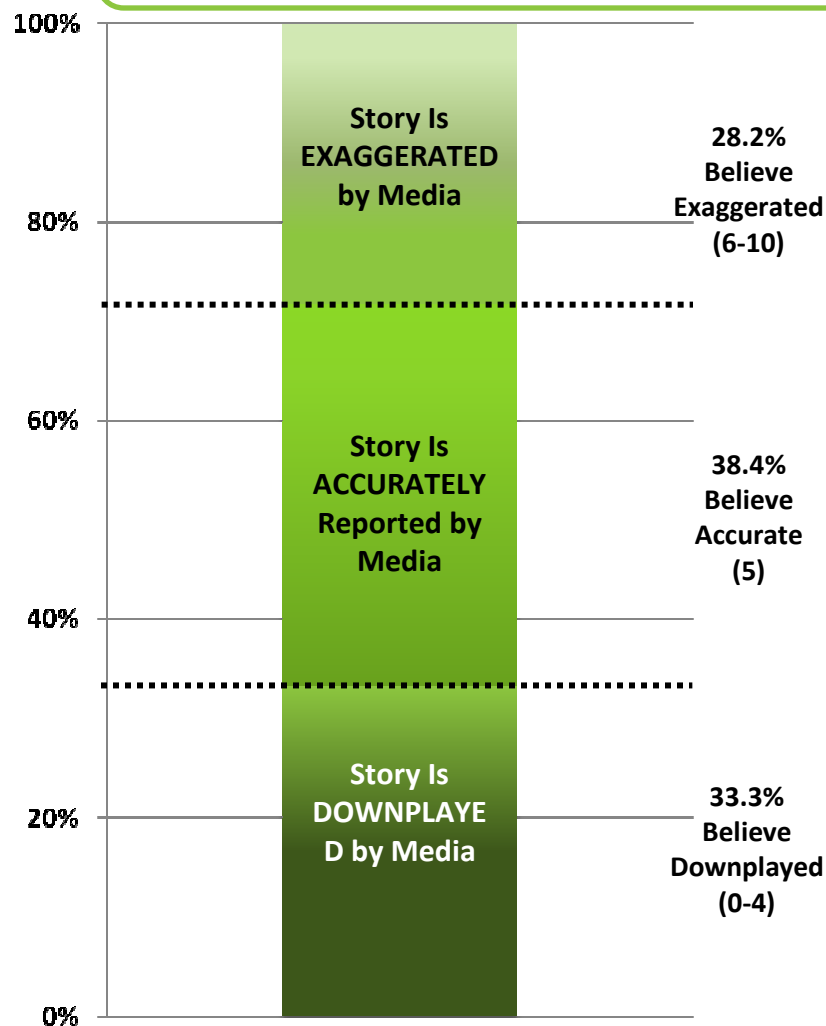
Q5. Which of the following statements best describes how familiar you are with the oil spill story in the Gulf of Mexico.

Oil Spill Primary Information Source & Belief in Source

Base: Total Respondents
(n=903)

Source	Percent
Cable TV news (e.g., CNN, Fox News, MSNBC)	28.0
Internet	23.3
Network TV news (e.g., CBS, ABC, NBC)	20.7
Local TV news	12.6
Newspapers	9.0
Radio	4.1
Family and Friends	1.3
Magazines	0.6
None of the above	0.4

The largest percentage (38%) of regional respondents believe that the oil spill story is being accurately reported. The remainder are nearly evenly split between belief that the story is being downplayed (33%) and belief that it's being exaggerated (28%).



Q12. What is your number one source of information about the oil spill?
Q7. Think for a moment about all that you have seen or heard about the oil spill from all news sources, and then rate your opinion using the scale below. The damage to Louisiana is...

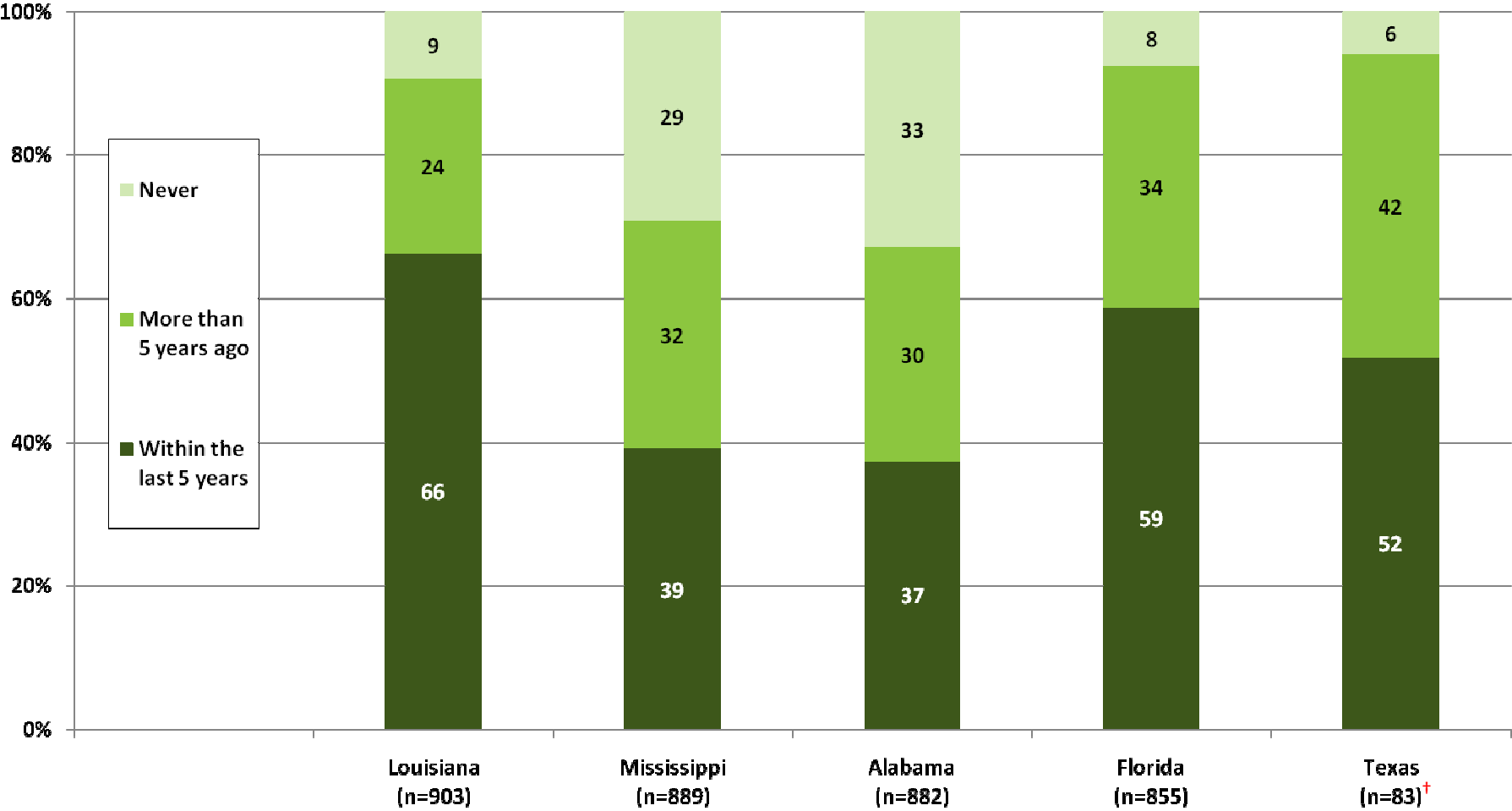
0- Being downplayed in reporting 1 2 3 4 5- Being accurately reported 6 7 8 9 10- Being exaggerated in reporting

Respondent Profile

Last Time Visited Gulf Coast States

Base: Respondents who do not live in the state

Historically, Louisiana has been a popular destination for regional travelers. About 2 out of 3 (66%) have visited the state in the last 5 years.



[†] Caution: small base size
Q1. Please indicate the last time you visited...

Respondent Profile

Base: Total Respondents
(n=903)

CHARACTERISTIC	PERCENT
Race/Ethnicity	
White	88.0
Asian	3.3
Hispanic	3.3
African American/Black	3.2
Other	2.1
Education	
No college	6.6
Some college	18.9
College graduate	36.9
Post graduate work or degree	37.5
Household Income (in thousands of dollars)	
\$50K to under \$75K	23.0
\$75K to under \$100K	31.2
\$100K to under \$125K	21.7
\$125k or more	24.0
Age (in years)	
25-35	15.6
36-55	42.9

Thank you