

# LOUISIANA

LouisianaTravel.com

## **Oil Spill Research Report**

### **Regional Wave 2**

October 8, 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.
- ◆ The research reported herein details results from the second of two waves of research designed to measure the impact of the oil spill at the regional level. MDRG conducted the first wave of regional research in June 2010, and the second regional wave in September 2010.

## Research Objectives

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

## Methodology

- ◆ MDRG used an Internet panel for the purposes of data collection. The survey was available on MDRG’s secure website from September 21-24, 2010 and took an average of 7.3 minutes to complete. The first wave (June 18-21, 2010) and took an average of 6.5 minutes to complete.

## Sample

- ◆ A total of 903 Regional respondents were recruited from the e-Rewards Consumer Internet Panel in Wave 1 and 900 in Wave 2. 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
  - Share equally or are the primary decision maker when making leisure travel plans
  - Do not currently live in Louisiana
  - Live in one of the six target markets (see table)
  - Are not employed in the travel, market research, marketing or advertising industries

Market	June 2010	September 2010
Dallas	366	366
Houston	267	269
San Antonio	108	108
Austin	79	78
Mobile/Pensacola	69	68
Hattiesburg/Laurel	14	11
<b>TOTAL</b>	<b>903</b>	<b>900</b>

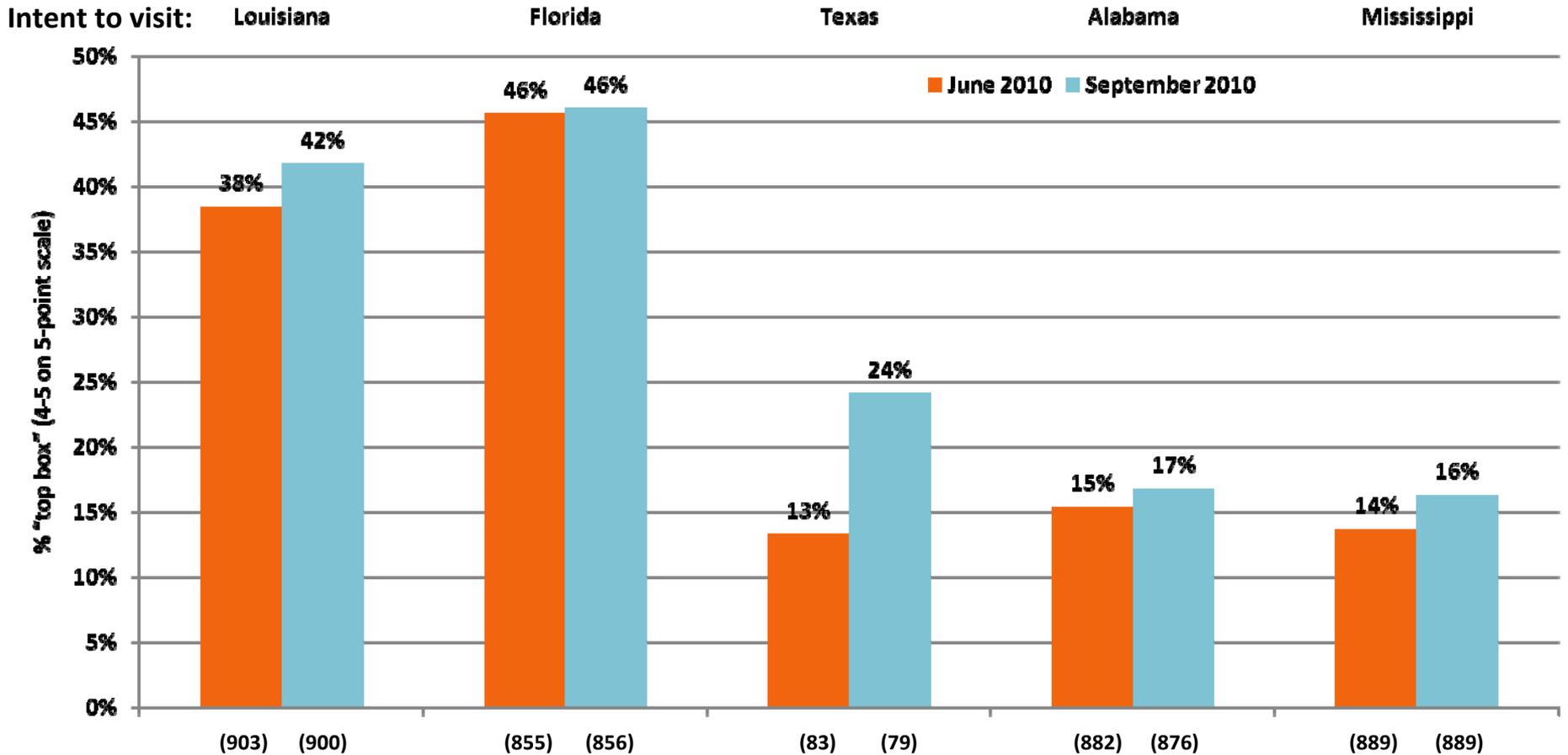
# Summary

- ◆ **Since June, there has been no change among Regional respondents in intent to visit Louisiana in the next 12 months.**
  - About 4 out of 10 Regional respondents say they plan to visit Louisiana in the next 12 months.
- ◆ **Negative perceptions of the oil spill on Louisiana have declined.**
  - Smaller percentages of Regional respondents believe that Louisiana will be affected over the long-term and that the oil spill is worse than the effects of the 2005 hurricanes.
  - Compared to June, Regional respondents in September are less likely to say that the oil spill's devastation is preventing them from visiting Louisiana.
- ◆ **Misperceptions about Louisiana seafood remain.**
  - About one third of unlikely visitors say they would visit Louisiana if seafood were available as before the oil spill.

**What can Louisiana (and other Gulf Coast states) expect in terms of Regional visitors?**

# About 4 out of 10 of Regional respondents said that they plan to visit Louisiana in the next year.

Base: Respondents who do not live in the state

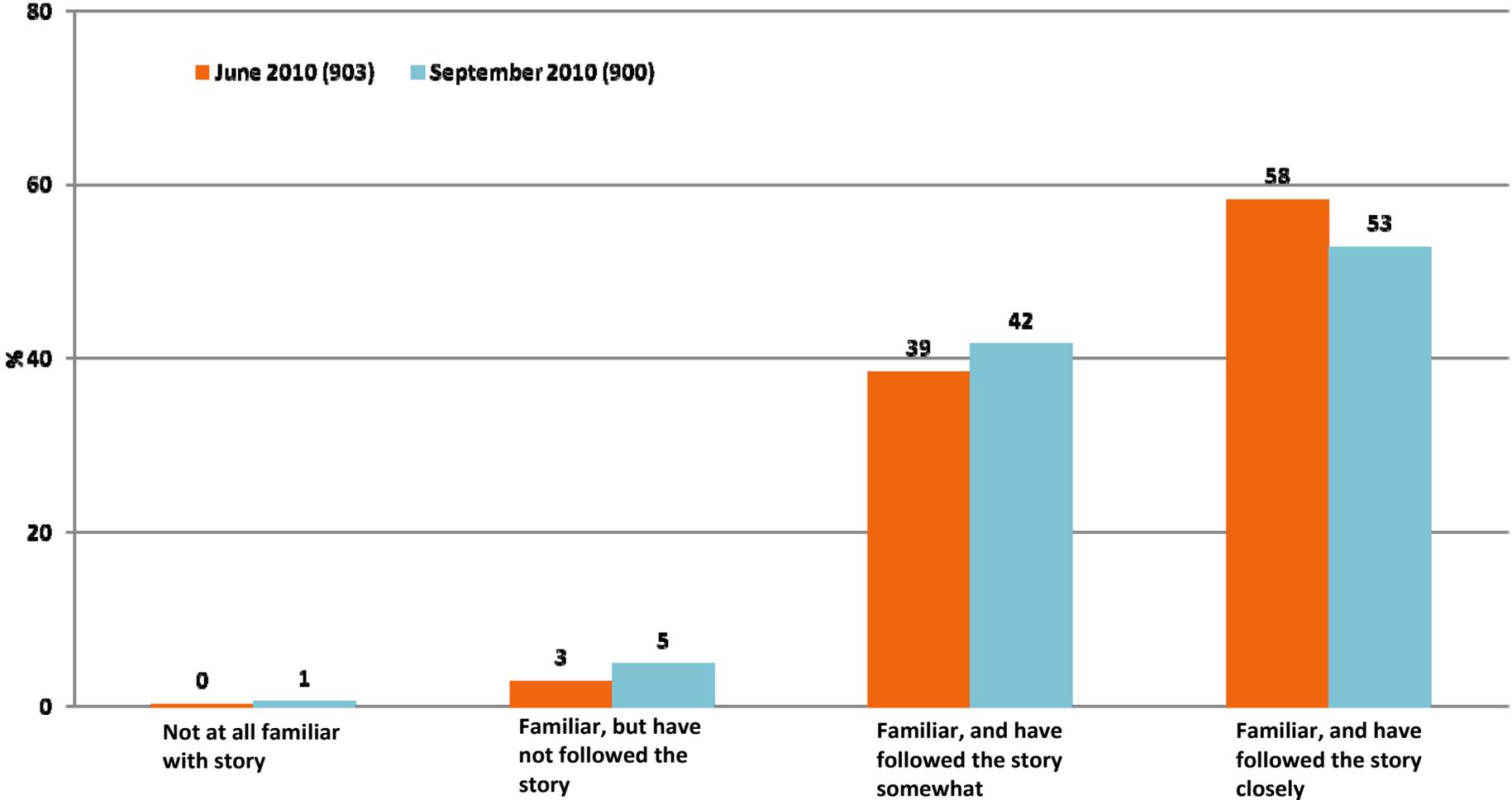


No significant differences between June and September waves

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:

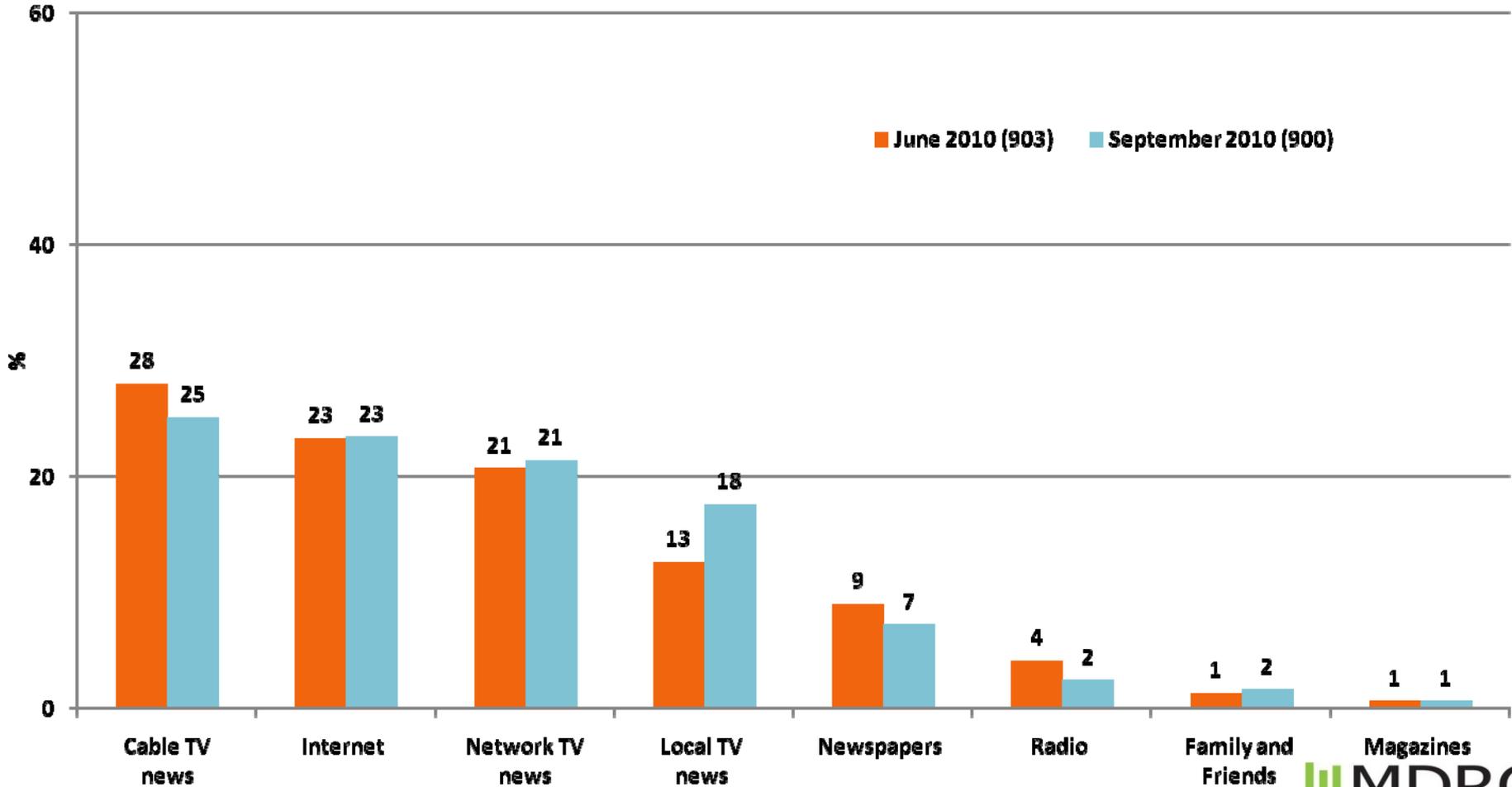
# Are Regional respondents still following the oil spill?

# Most respondents are familiar with the oil spill story, although fewer are following the story closely.

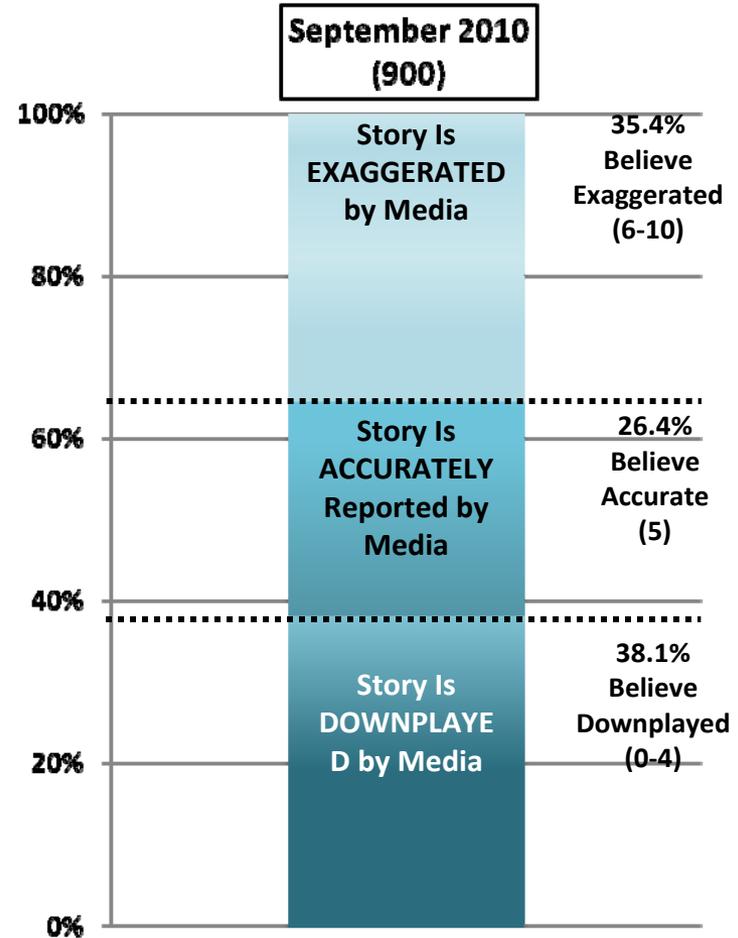
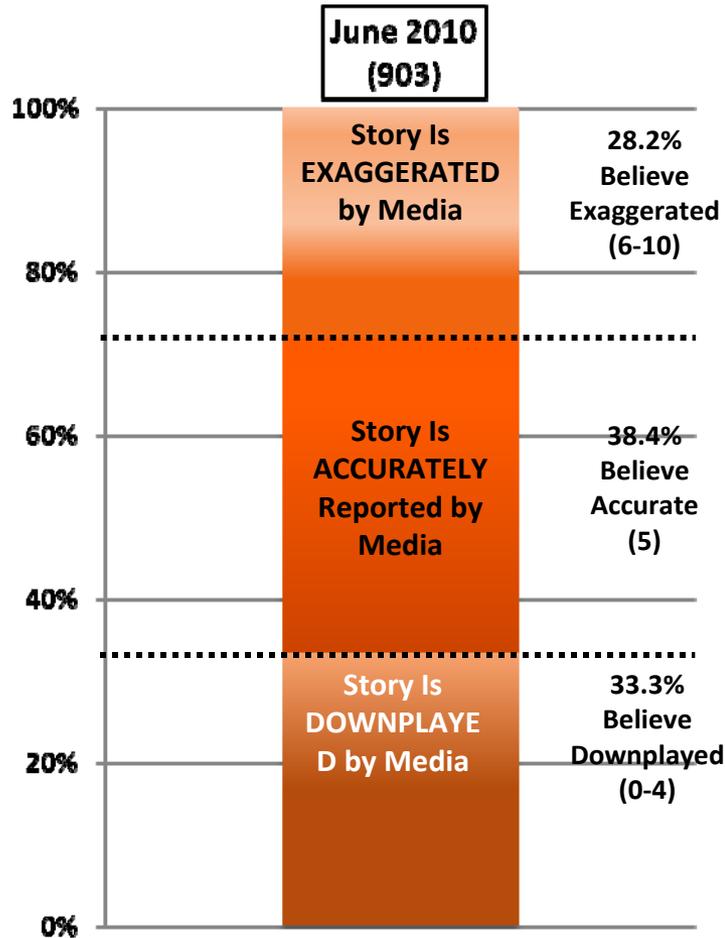


Q5. Which of the following statements best describes how familiar you are with the oil spill story in the Gulf of Mexico.

# Regional respondents acquire information about the oil spill from a variety of sources.



# The percentage of respondents who believe the oil spill story is being accurately reported declined since June.



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 a scale from 0-10 where "0" means the story is being downplayed, "5" means the story is being accurately reported, and "10" means the story is being exaggerated.

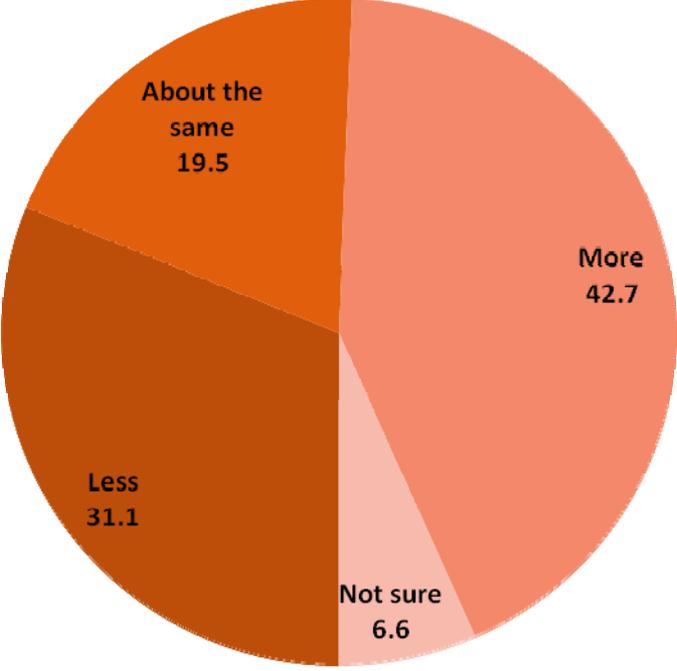
0- Being downplayed in reporting    1    2    3    4    5- Being accurately reported    6    7    8    9    10- Being exaggerated in reporting

**How bad do Regional respondents think the oil spill has been for Louisiana?**

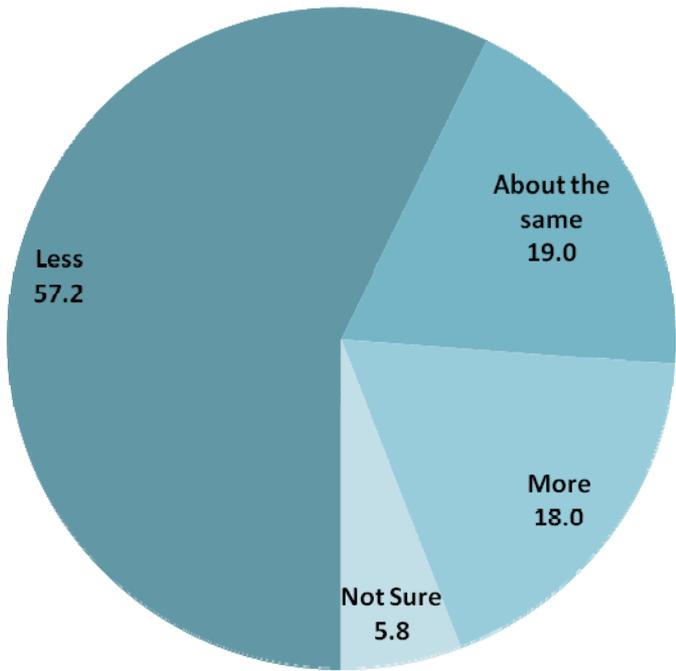
# The negative perception of the oil spill on Louisiana has declined since June – about 6 out of 10 believe that the oil spill is less devastating than the 2005 hurricanes.

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

June 2010  
(903)

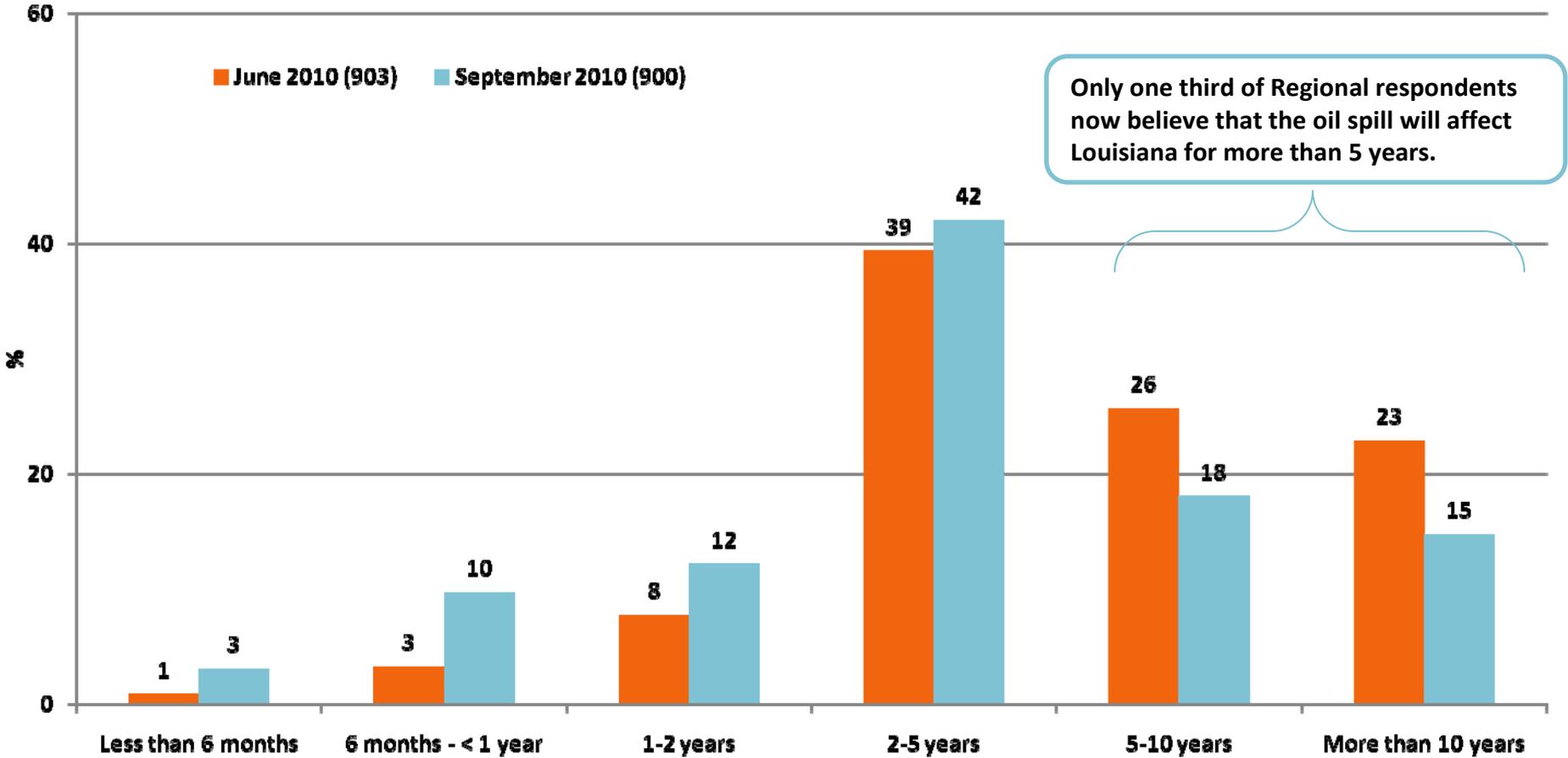


September 2010  
(900)



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:

# Significantly fewer Regional respondents believe that the effects of the oil spill on Louisiana will extend beyond 5 years.

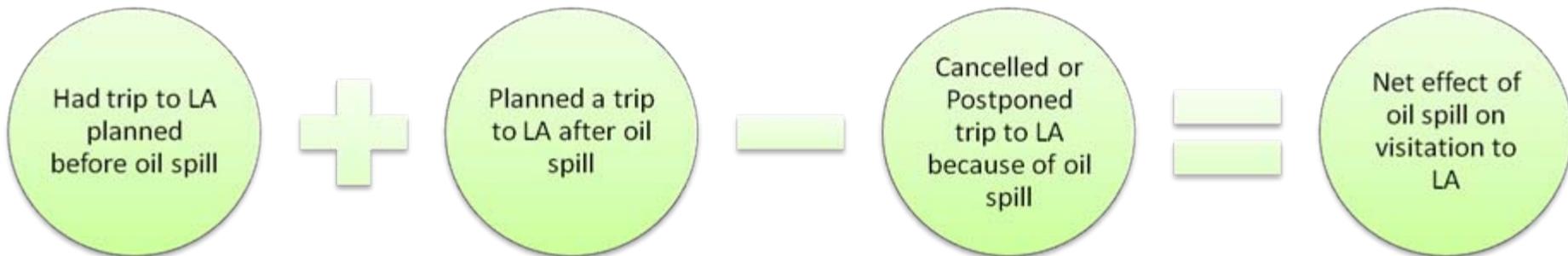


Q11. Based on everything you know about the oil spill, how long do you think Louisiana will be affected?

**How has the oil spill affected Regional respondents' travel plans to Louisiana?**

# To answer that question, we examined travel plans to Louisiana before and after the oil spill.

- ◆ 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:
  - The number/percentage of respondents likely to visit Louisiana prior to the oil spill
  - Plus the number/percentage of respondents who planned trips to Louisiana because of the oil spill
  - Minus the number/percentage of respondents who cancelled or postponed trips to Louisiana because of the spill



# The net effect of the oil spill on visitation to Louisiana is negative and similar to the June 2010 results.

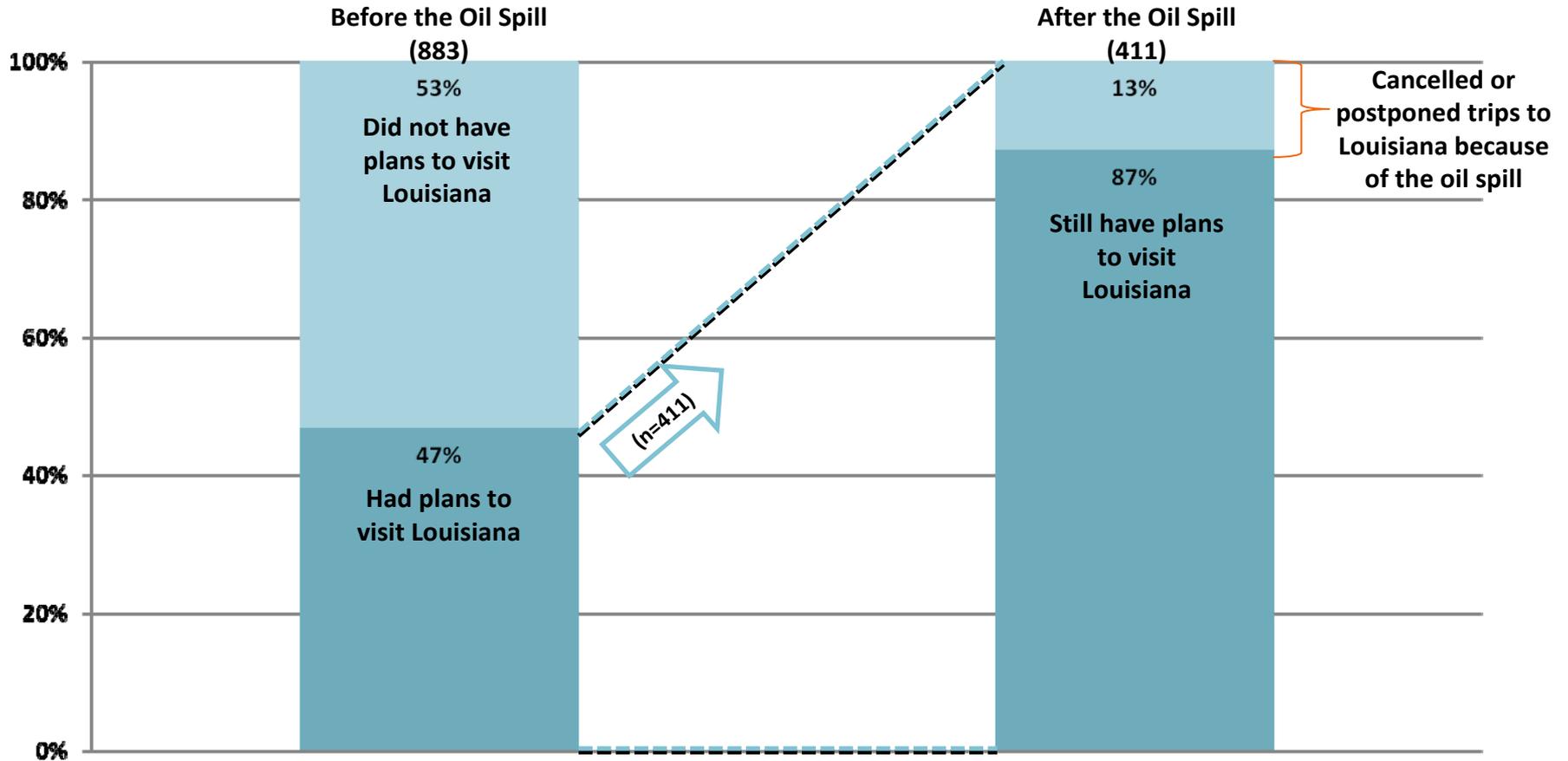
Effects of oil spill on leisure travel plans measured in 3 steps:	June 2010 (903)		September 2010 (900)	
	Number	Percentage	Number	Percentage
1. Had Plans to Visit before the Oil Spill	389	43.1%	411	45.7%
2. Made Plans to Visit after the Oil Spill	+23	+2.5%	+17	+1.9%
3. Cancelled or Postponed Plans to Visit after the Oil Spill	-65	-7.2%	-53	-5.9%
<b>Have Plans to visit</b>	<b>347</b>	<b>38.4%</b>	<b>375</b>	<b>41.7%</b>

No significant differences between June and September waves

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?

# More than 1 out of 10 (13%) would-be visitors cancelled or postponed plans to visit Louisiana because of the oil spill.

September 2010



NOTE: Respondents who made plans to visit Louisiana after the oil spill (n=17) 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.]

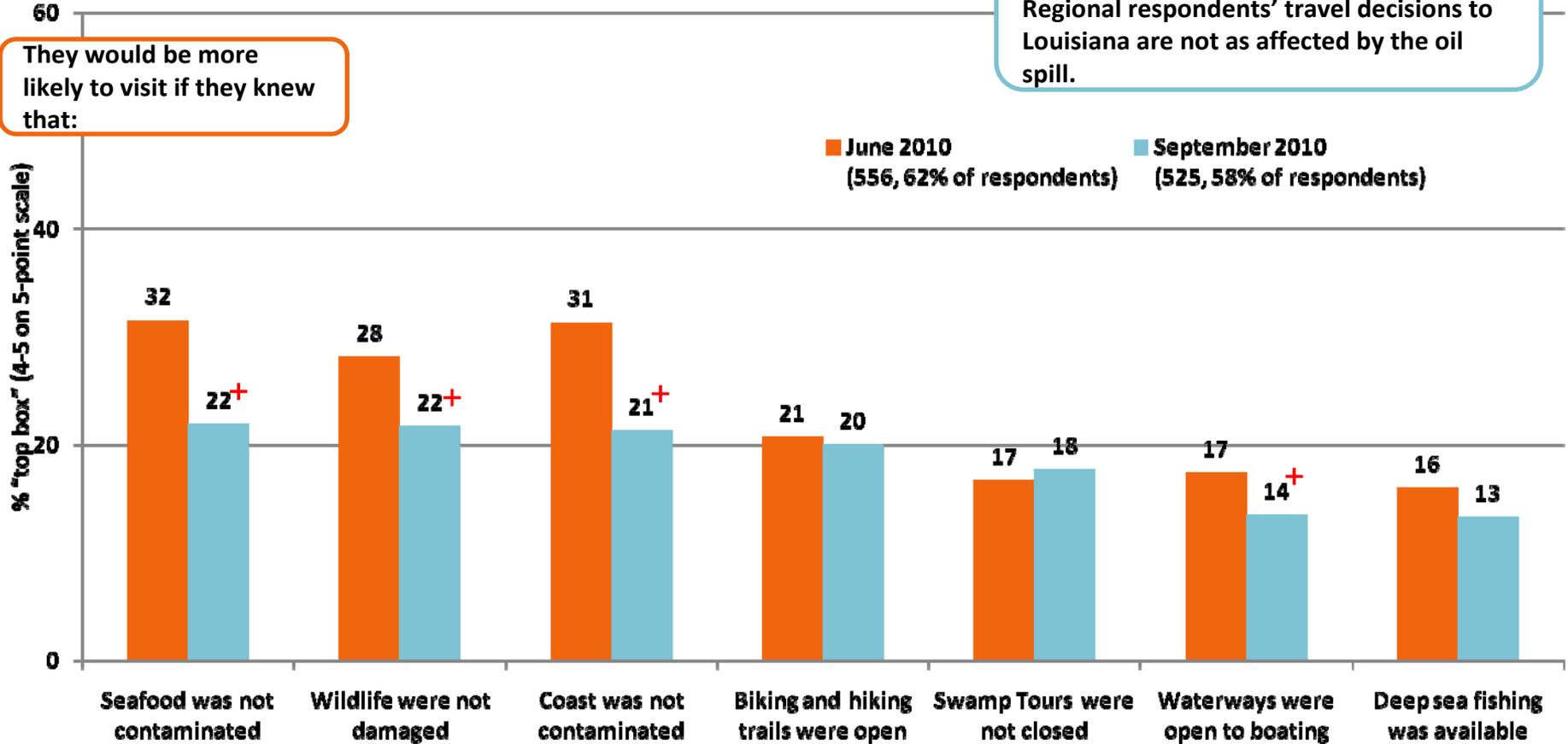
**What could Louisiana say that would attract  
Regional visitors?**

# Tell them that Louisiana has what was available before the oil spill – *seafood, wildlife and an uncontaminated coast.*

Among Respondents NOT likely (1-3 on 5-point scale) to visit Louisiana

These messages are *less* effective now than in June, which may indicate that Regional respondents' travel decisions to Louisiana are not as affected by the oil spill.

They would be more likely to visit if they knew that:

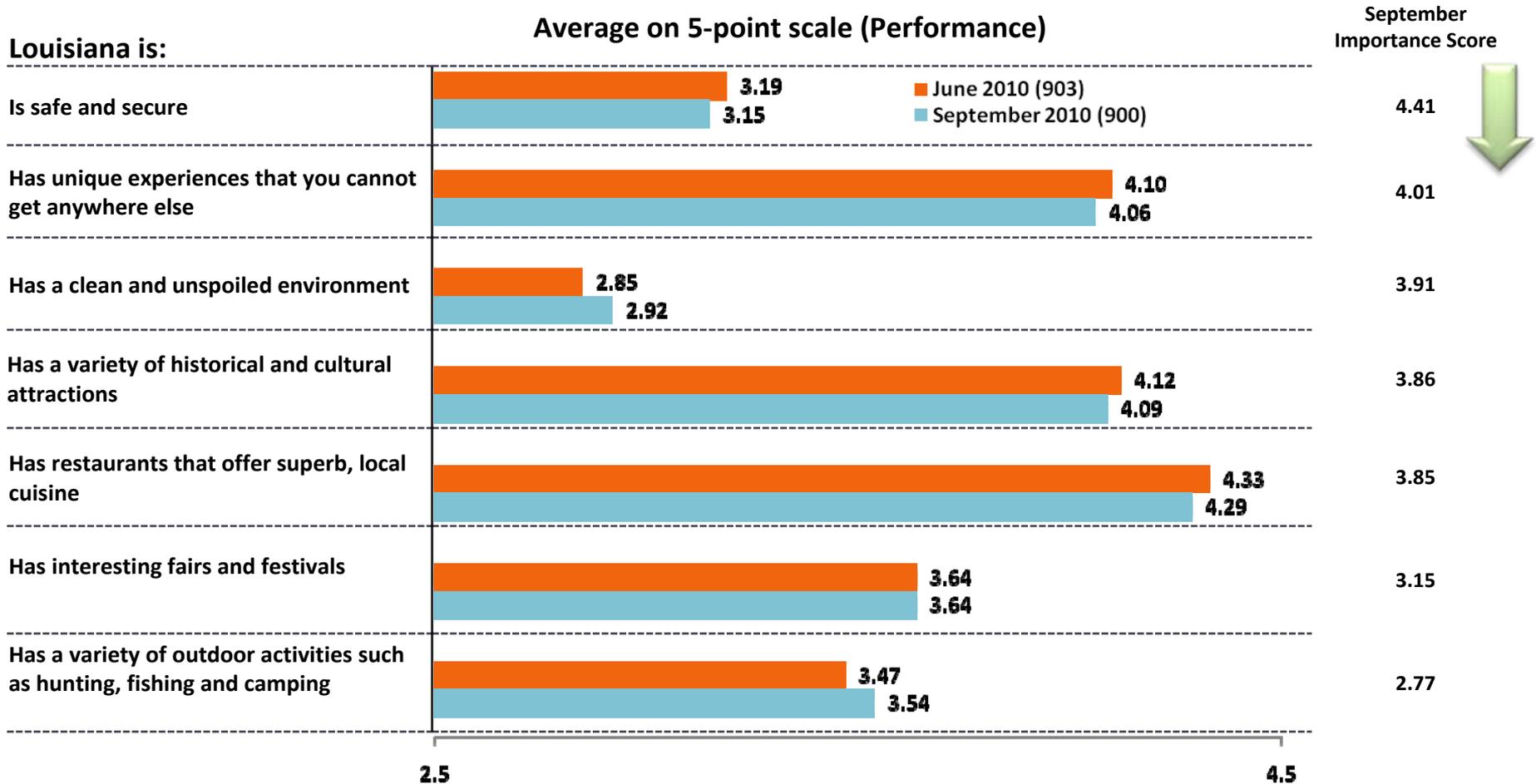


+ Significant difference between June and September waves

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...

# Communicate that Louisiana offers *unique experiences, cultural attractions and superb cuisine.*

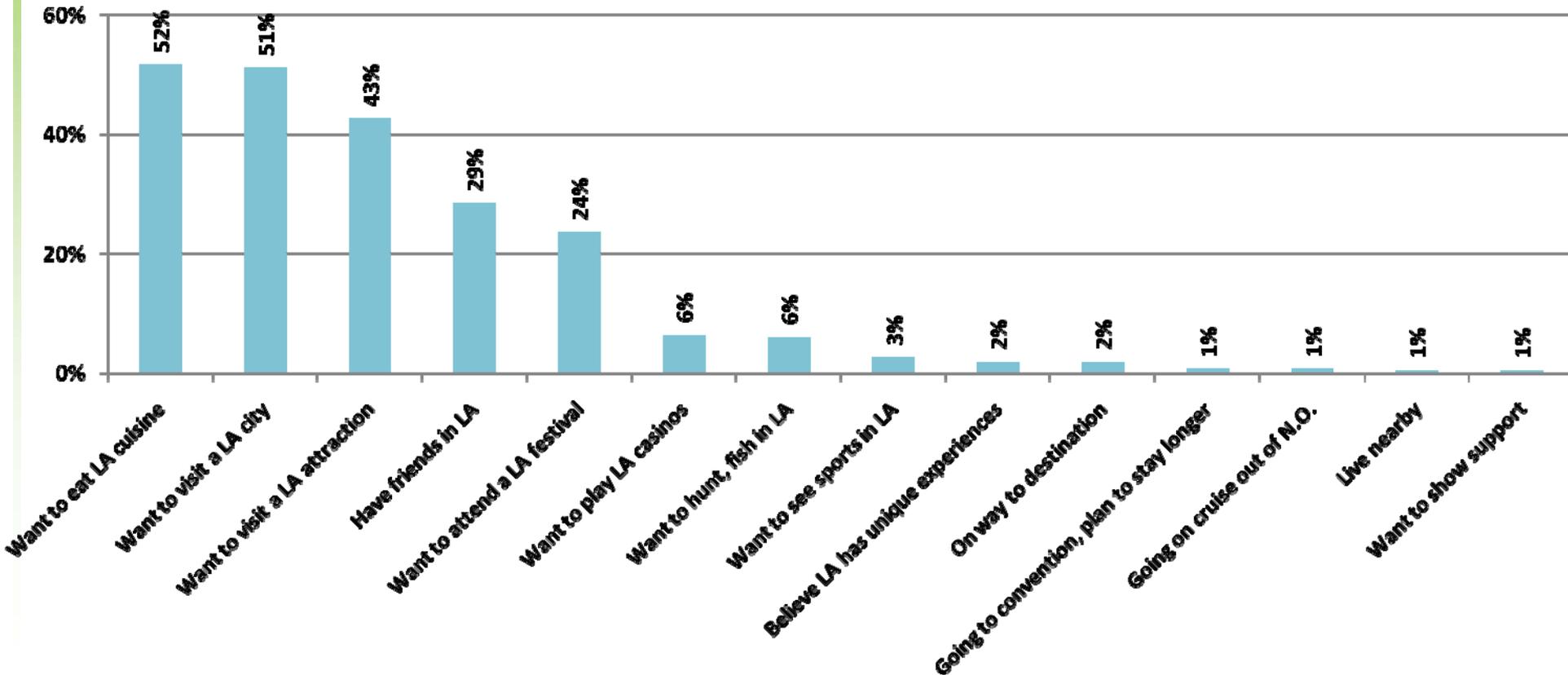
(Regional respondents' top priority to feel *safe and secure* continues to have room for improvement.)



Q3/Q4. 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/do not agree at all and "5" means the phrase is extremely important/strongly agree, 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/to indicate the extent you agree with the following statements about Louisiana today.

# More than half of Regional respondents who plan to visit Louisiana want to eat Louisiana cuisine and visit a Louisiana city or location.

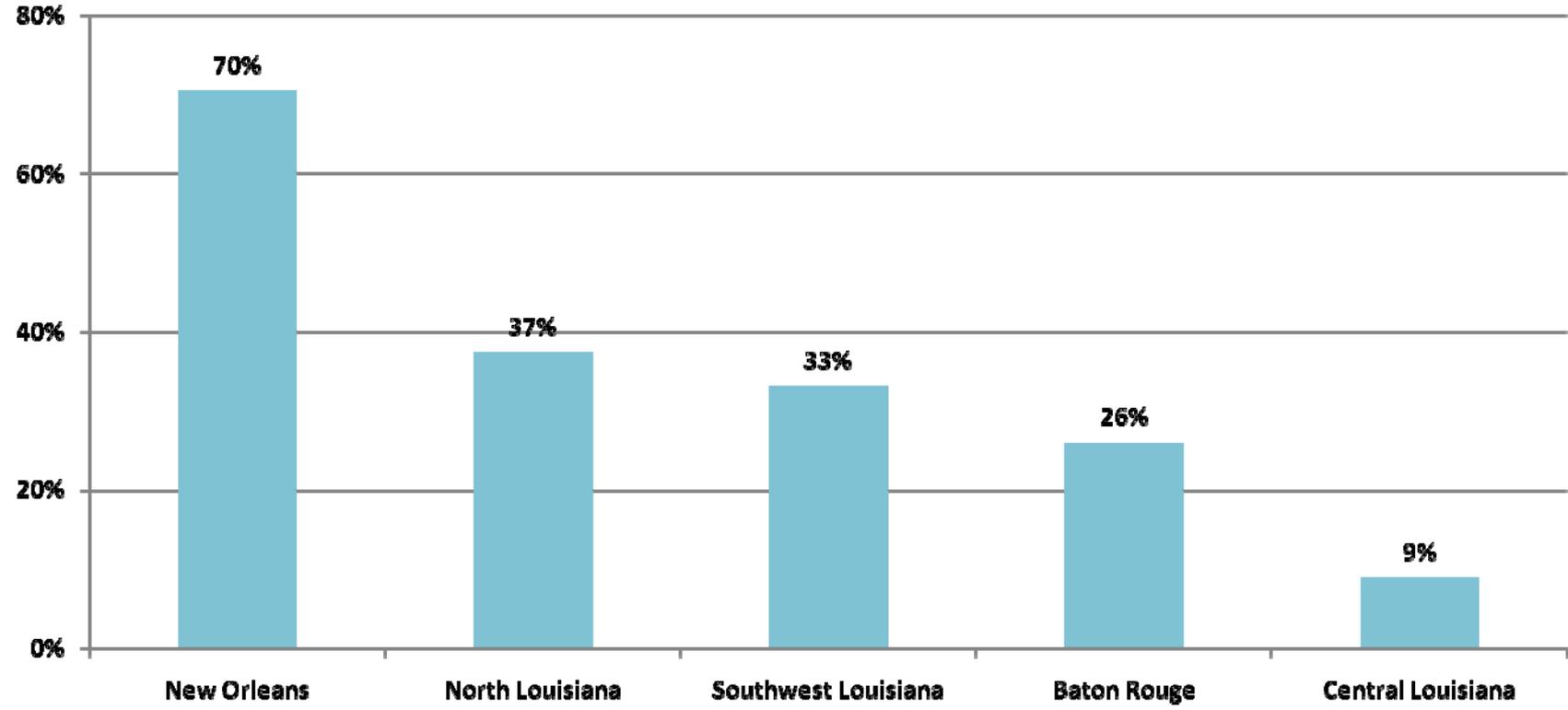
Among Respondents likely (4-5 on 5-point scale) to visit Louisiana  
September 2010  
(base=375, 42% of Respondents)



Q9.3 What led you to select Louisiana as a leisure travel destination? (Select all that apply.)

# Many likely Regional visitors are interested in going to New Orleans...North and Southwest Louisiana are also areas of interest.

Among Respondents likely (4-5 on 5-point scale) to visit Louisiana  
September 2010  
(base=375, 75% of Respondents)



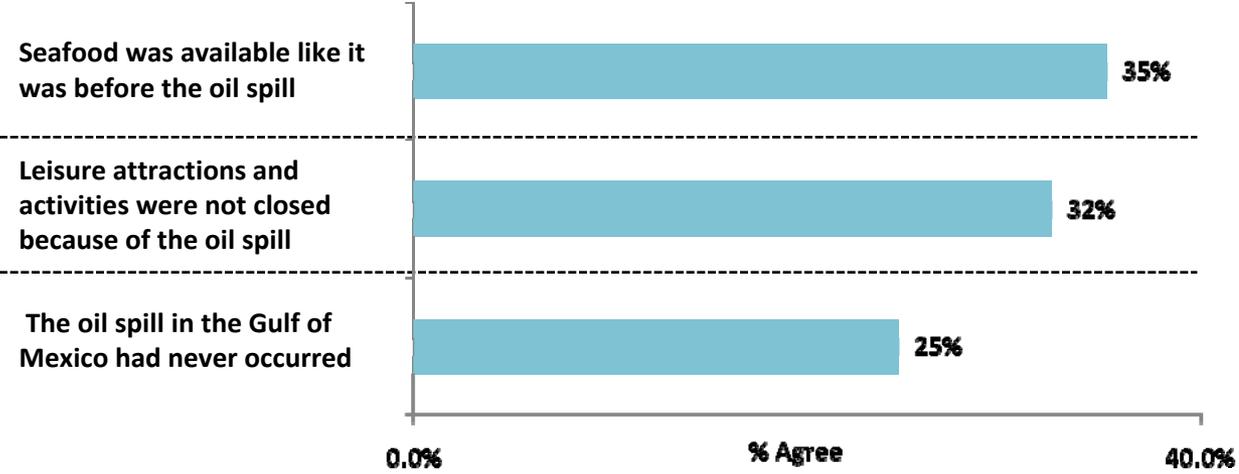
Note: This question was not asked in June

Q9.2 Earlier you indicated that you are likely to visit Louisiana. Which of the following areas of Louisiana do you plan to visit? (Select all that apply.)

# About one third of unlikely visitors say they would visit Louisiana if the seafood and leisure attractions & activities are available as they were before the oil spill.

Among Respondents NOT likely (1-3 on 5-point scale) to visit Louisiana  
September 2010  
(base=525, 58% of Respondents)

**I would visit Louisiana if:**

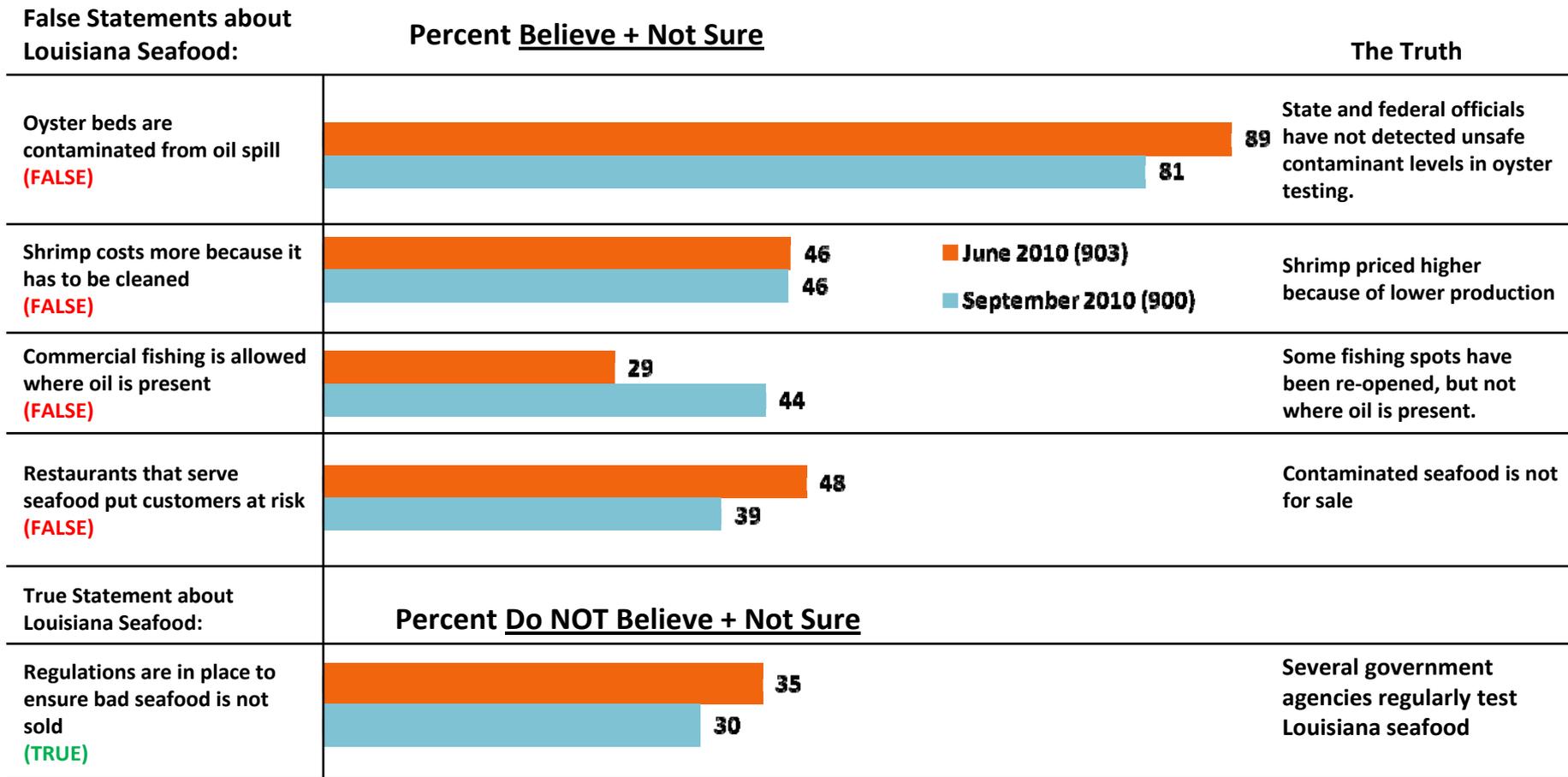


Note: This question was not asked in June

Q9.1. Do you agree or disagree with the following: I would visit Louisiana if:

**What specifically should be said about Louisiana seafood to Regional respondents?**

# Misperceptions about Louisiana seafood remain pervasive, although there has been some improvement in knowledge about oysters beds and restaurant risks.

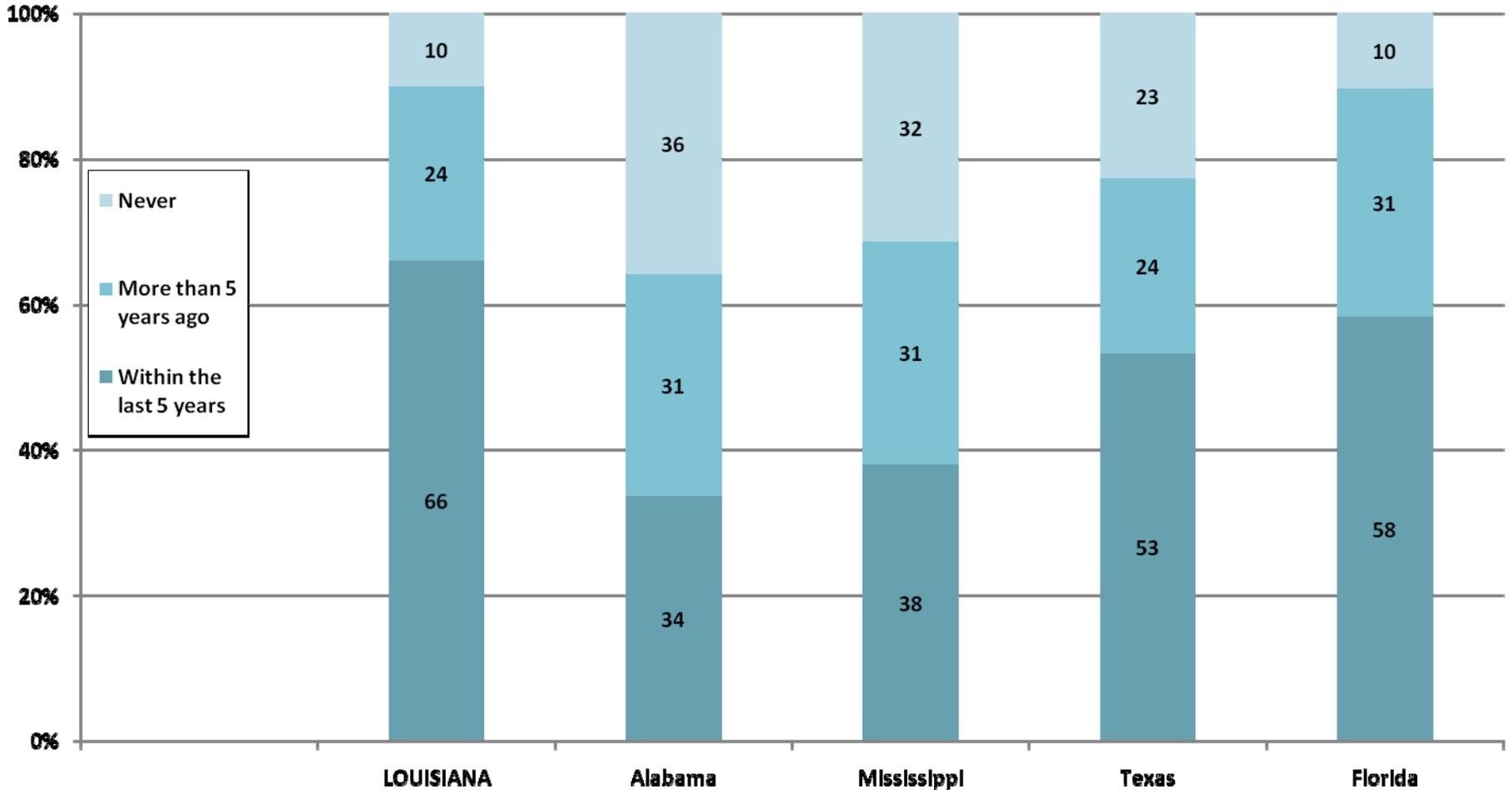


Oil began spilling from an oil well on April 20, 2010 after an oil rig exploded in the Gulf of Mexico about 50 miles off the coast of Louisiana. Since mid-July 2010, the oil spill has been contained with a temporary cap. Q6. Considering this information and anything else you may have heard about the oil spill, please indicate whether you believe each of the following statements about Louisiana seafood.

# Respondent Profile

# Last Time Visited Gulf Coast States

Base: Respondents who do not live in the state  
(n=900 total)



Q1. Please indicate the last time you visited...

# Respondent Profile

Total Respondents June 2010 base =903, September 2010 base=900

<b>Educational Attainment</b>	<b>June 2010</b>	<b>Sept. 2010</b>
No college	7	8
Some college	19	21
College graduate	37	36
Post-graduate work or degree	38	35

<b>Race/Ethnicity</b>	<b>June 2010</b>	<b>Sept. 2010</b>
White	88	81
Black/African-American	3	3
Asian	3	6
Hispanic	3	8
Other	2	3

<b>Household Income</b>	<b>June 2010</b>	<b>Sept. 2010</b>
\$50K to under \$75K	23	29
\$75K to under \$100K	31	26
\$100k to under \$125k	22	22
\$125k and over	24	24

Units: %

<b>Age</b>	<b>June 2010</b>	<b>Sept. 2010</b>
20-35	16	20
36-55	43	45
56 and older	42	35

<b>Gender</b>	<b>June 2010</b>	<b>Sept. 2010</b>
Male	52	50
Female	48	50

<b>Household Composition</b>	<b>June 2010</b>	<b>Sept. 2010</b>
Single, no children	16	13
Single, with children	4	3
Married/Living with partner, no children	49	47
Married/Living with partner, with children	31	37

<b>Region</b>	<b>June 2010</b>	<b>Sept. 2010</b>
Dallas, TX	40.5	40.7
Houston, TX	29.6	29.9
San Antonio, TX	12.0	12.0
Austin, TX	8.7	8.7
Mobile, AL/Pensacola, FL	7.6	7.6
Hattiesburg/Laure, MS	1.6	1.2

# Appendix: Questionnaire

⇒ Separate Document

**Thank you**