



Effects on Perception/BP Oil Spill Survey Wave 1- Results

May 28, 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 purposes of data collection. The survey was available on MDRG's secure website from May 19-21, 2010, and took an average of 6 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
 - Do not currently live in Louisiana
 - Are not employed in the travel, market research, marketing or advertising industries
- ◆ A total of 1,003 nationwide respondents completed the survey.

Key Findings

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Key Findings

1. The oil spill in the Gulf of Mexico has had a negative impact on leisure travelers' plans to visit Louisiana.

- Prior to the oil spill, approximately 23% of nationwide respondents claim that they had plans to visit Louisiana. Over one-quarter (26%) of those respondents have either postponed or cancelled the trip.
 - ◆ The loss of visitation (26% of Louisiana visitors) means that instead of 23% of nationwide respondents having plans to visit Louisiana, only 17% have plans.

2. Perceptions that Louisiana is damaged from the oil spill is making some nationwide leisure travelers reluctant to visit Louisiana.

- Among respondents who said that they had no plans to visit Louisiana, about 1 out of 4 agreed that they would be more likely to visit if "The Louisiana coast was not contaminated with oil," "Louisiana wildlife – birds, alligators, etc. – could be seen as they were before the oil spill," and if "Louisiana seafood were not contaminated with oil" (28%, 27%, and 25%, respectively).
- About 1 out of 5 those respondents indicated that they would be more likely to visit if "Louisiana swamp tours were not closed because of the oil spill," "Louisiana waterways were not closed for boating due to the oil spill," and if "Biking and hiking trails in Louisiana had not been damaged from the oil spill" (20%, 20%, and 19%, respectively).

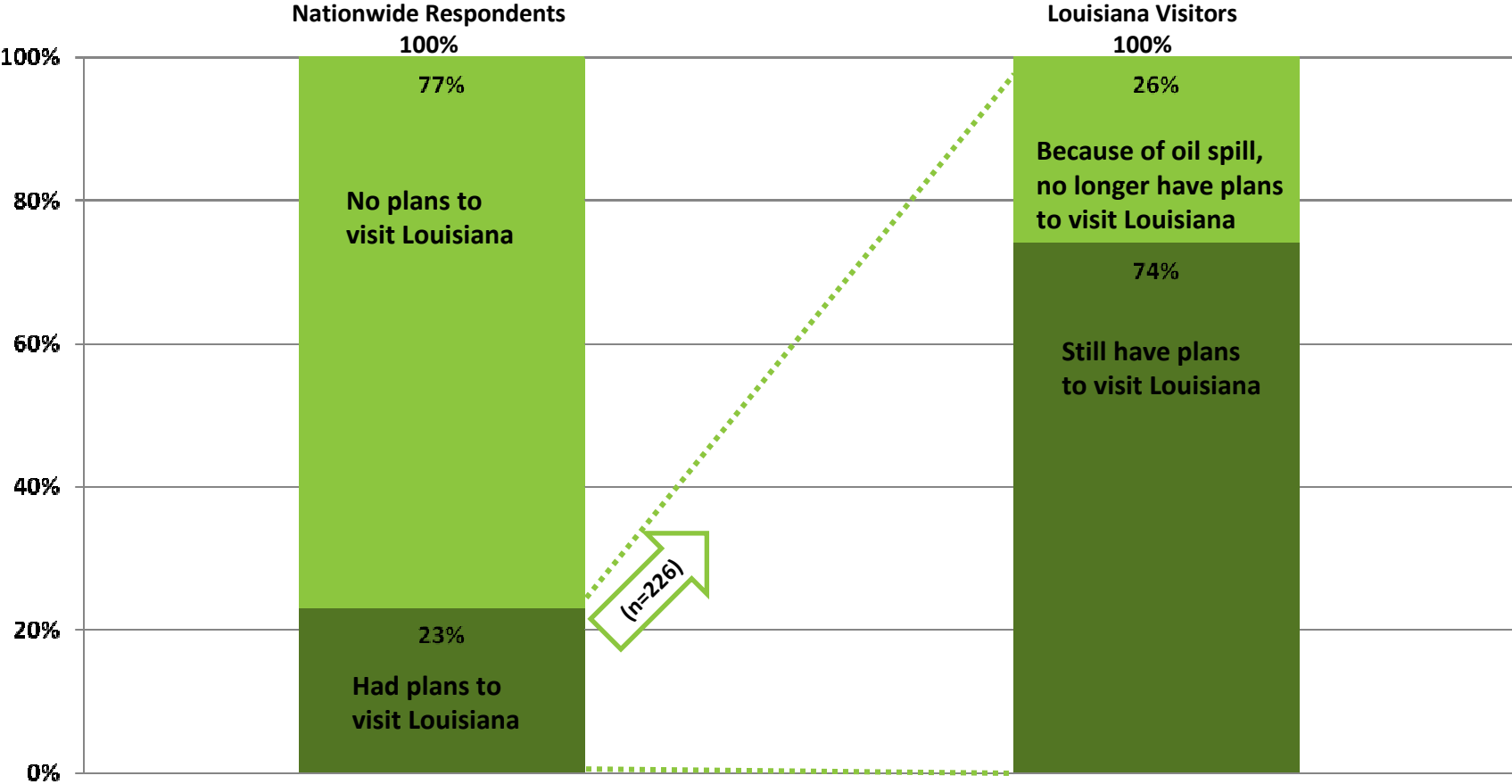
3. Belief in the quality of Louisiana seafood is at risk because of the oil spill.

- Nearly half (45%) of nationwide leisure travelers believe that "Louisiana oyster beds are contaminated from the oil spill" and another 41% are not sure.
- Sizeable minorities of respondents either believe (26%) or are not sure (31%) if the "Cost of Louisiana shrimp is higher because oil has to be cleaned from them before they can be sold."
- A full one-quarter (25%) of respondents believe that "Restaurants that use Louisiana seafood are putting their customers at risk."
- Over one-third (36%) of respondents either believe (12%) or are not sure (24%) if "Commercial fishing is allowed in area where oil is present."
- Nearly 1 out of 3 (29%) of respondents are not sure if "Regulations are in place to ensure that Louisiana does not sell seafood contaminated from the oil spill," and another 11% do not believe that they are.

Intent to Visit Louisiana

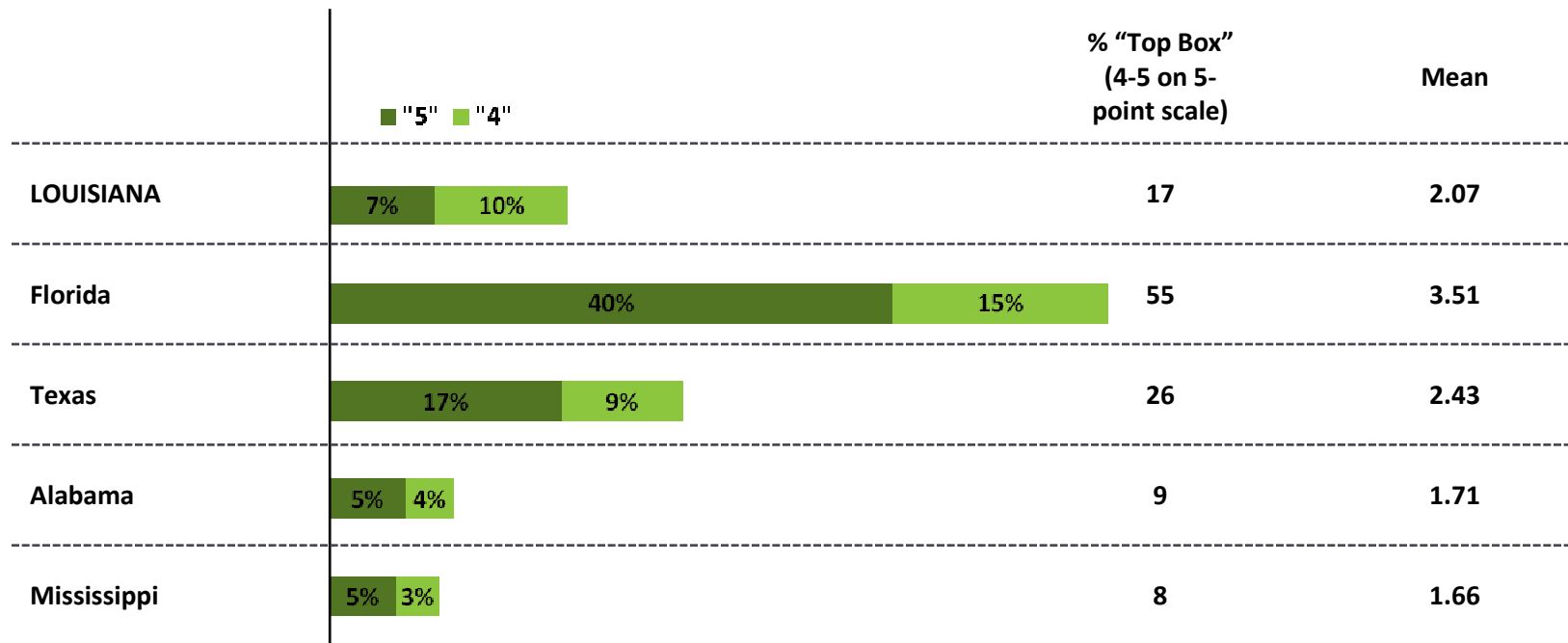
Affect of Oil Spill on Travel Plans to Louisiana

Prior to the oil spill, approximately 23% of Nationwide respondents said that they had plans to visit Louisiana. Over one-quarter (26%) of those respondents have either postponed or cancelled the trip.



Likelihood to Visit Louisiana and other Gulf Coast States

Total Respondents (n=1003)



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:

Impact of Messaging on Intent to Visit Louisiana

Impact of Messaging on Intent to Visit Louisiana

Among Respondents NOT likely to visit Louisiana
(1-3 on 5-point scale) (n=834, 83% of Respondents)

I Would be more likely to visit Louisiana if:	"5" "4" Agreement		% "Top Box" (4-5 on 5-point scale)	Mean
The Louisiana coast was not contaminated with oil	13	16	28	2.55
Louisiana wildlife – birds, alligators, etc. – could be seen as they were before the oil spill	10	17	27	2.55
Louisiana seafood were not contaminated with oil	11	14	25	2.46
Louisiana swamp tours were not closed because of the oil spill	7	13	20	2.35
Louisiana waterways were not closed for boating due to the oil spill	6	14	20	2.31
Biking and hiking trails in Louisiana had not been damaged from the oil spill	7	12	19	2.28
Deep sea fishing off the coast of Louisiana was not closed due to the oil spill	4	9	13	2.05

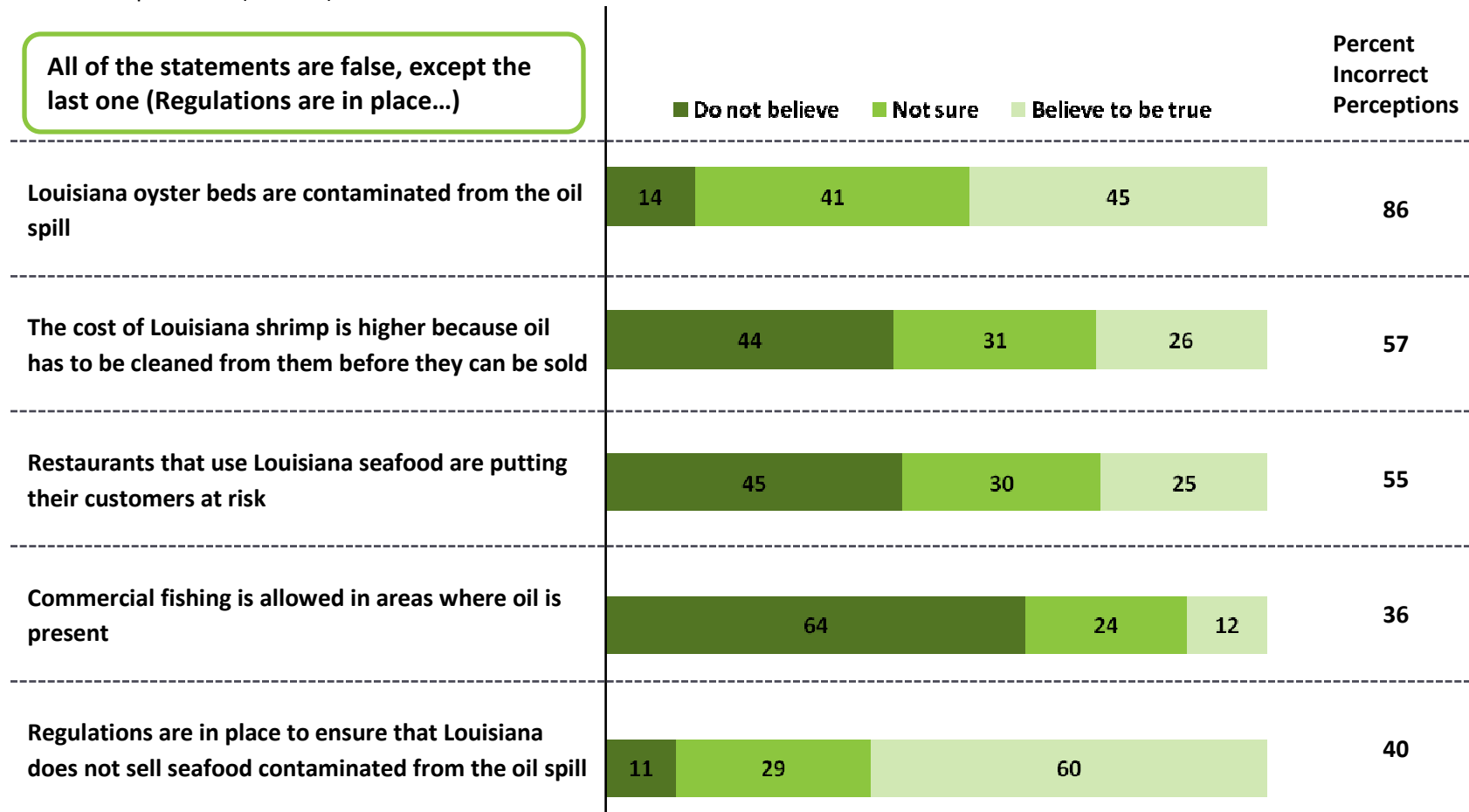
Q9. Earlier you indicated that you are not likely to visit Louisiana in the next 12 month. Please use the scale below to indicate your agreement with the list of statements about visiting Louisiana. I would be more likely to visit Louisiana if...

Perceptions of Oil Spill on Louisiana Seafood

Perceptions of Oil Spill on Louisiana Seafood

Total Respondents (n=1003)

All of the statements are false, except the last one (Regulations are in place...)



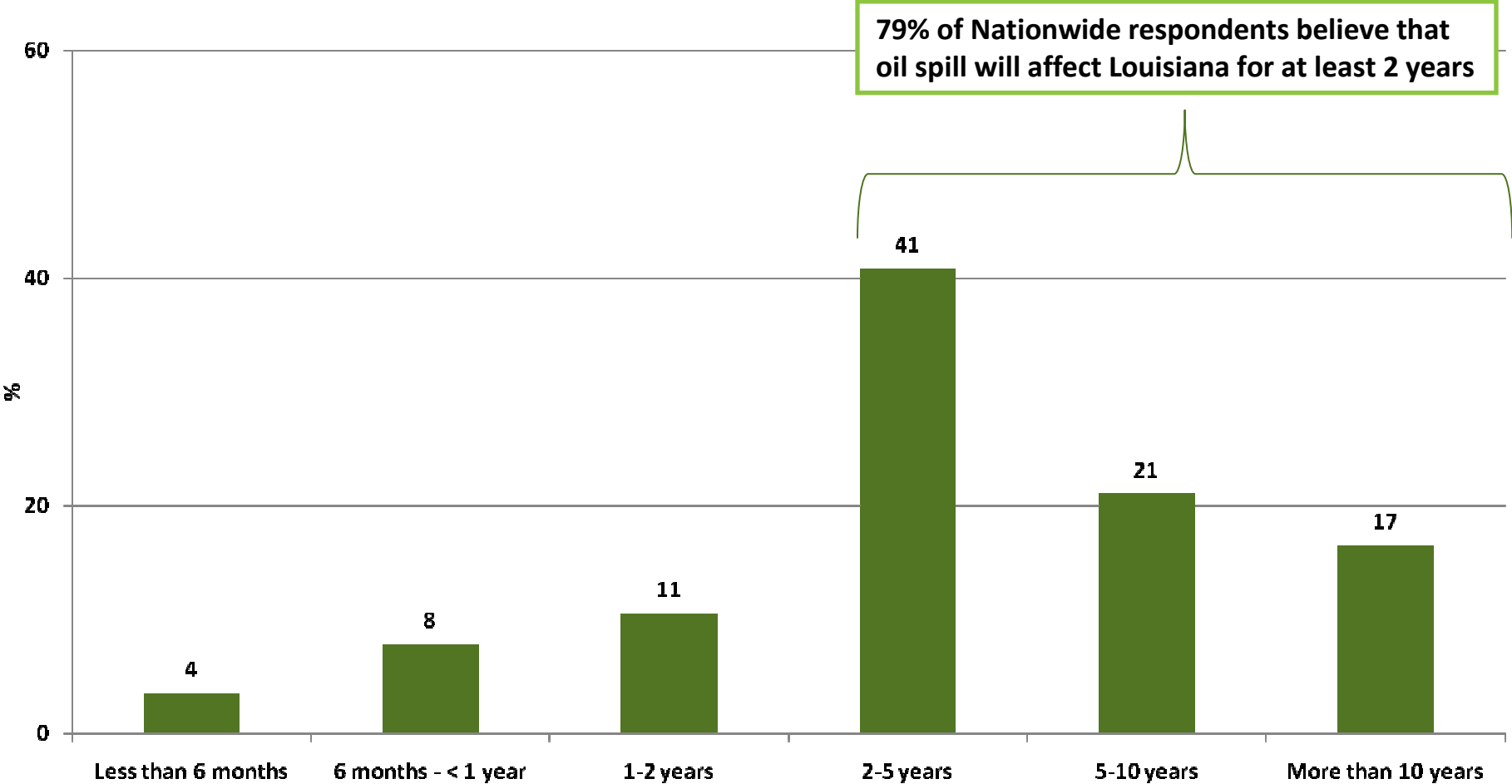
Oil has been spilling from an oil well since an April 20, 2010 fire and explosion on an oil rig located in the Gulf of Mexico about 50 miles off the coast of Louisiana.

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.

Perceptions of Severity of Oil Spill on Louisiana

Perceptions of Duration of Oil Spill's Affect on Louisiana

Total Respondents (n=1003)



79% of Nationwide respondents believe that oil spill will affect Louisiana for at least 2 years

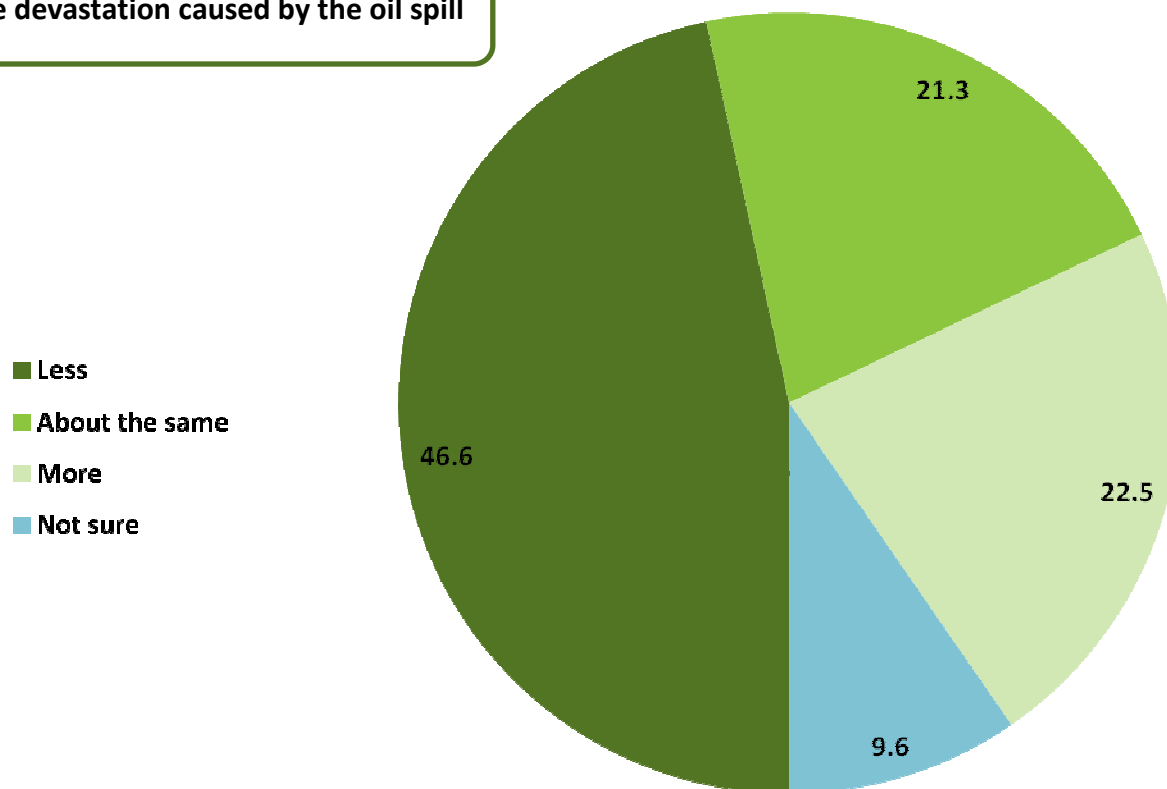
Q11. Based on everything you know about the oil spill, how long do you think Louisiana will be affected?

Perception of Oil Spill Devastation Compared to 2005 Hurricanes Devastation

Total Respondents (n=1003)

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

44% of Nationwide respondents believe that the oil spill is as bad as or worse than the 2005 hurricanes.

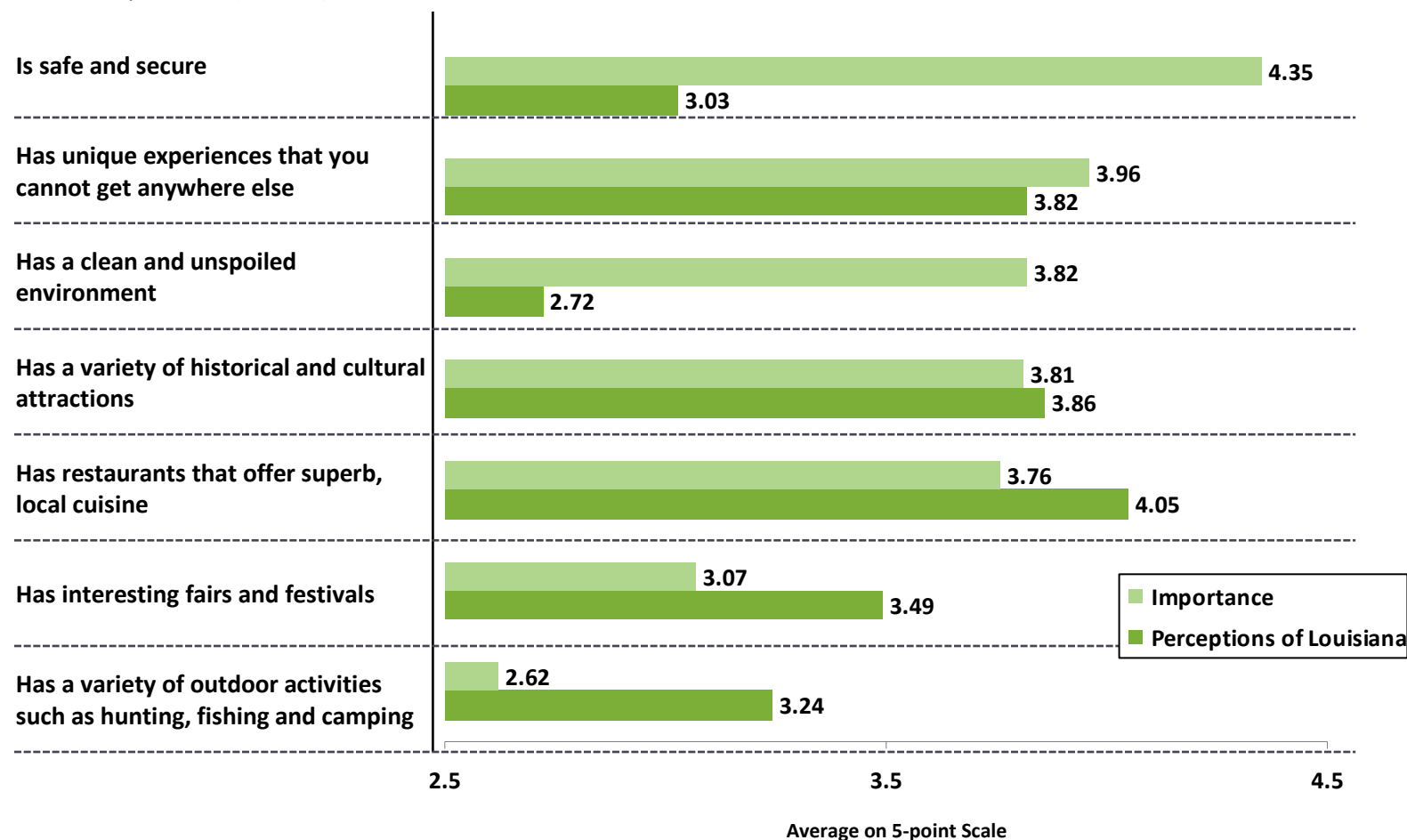


Q8. In the summer of 2005, as you probably remember, Hurricanes Katrina and Rita hit Louisiana. Compared to what you know about the devastation to Louisiana caused by those hurricanes, do you think the devastation to Louisiana caused by the oil spill is:

Importance of Leisure Travel Attributes and Perceptions of Louisiana

Importance of Leisure Travel Attributes and Perceptions of Louisiana

Total Respondents (n=1003)

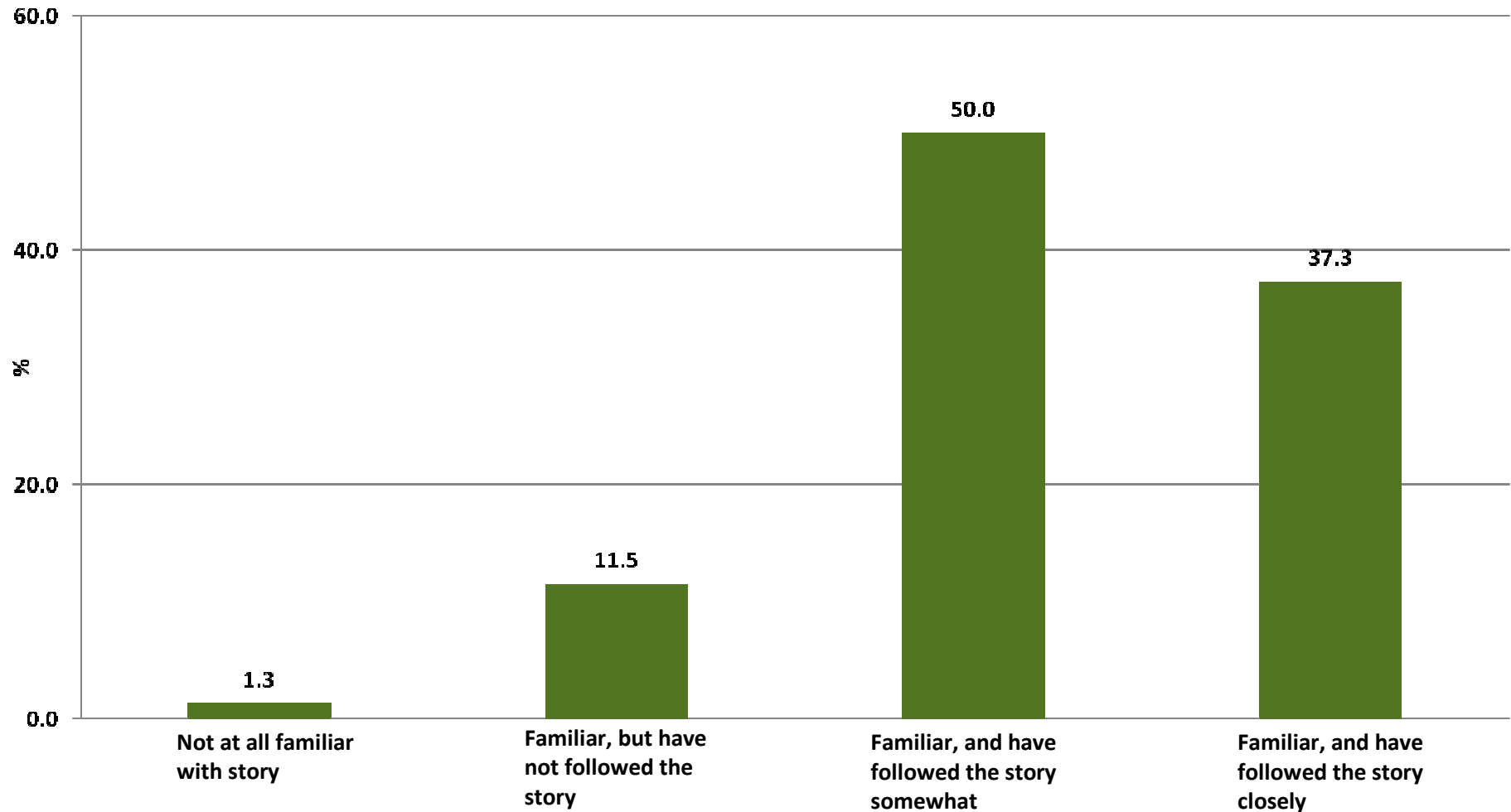


Q3. The table below contains a list of phrases that could be used to describe a leisure travel destination. Think for a moment about when you are planning a leisure trip. Using a scale from 1 to 5 where "1" means the phrase is not at all important and "5" means the phrase is extremely important, please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

The Oil Spill Story

Familiarity with Oil Spill Story

Total Respondents (n=1003)

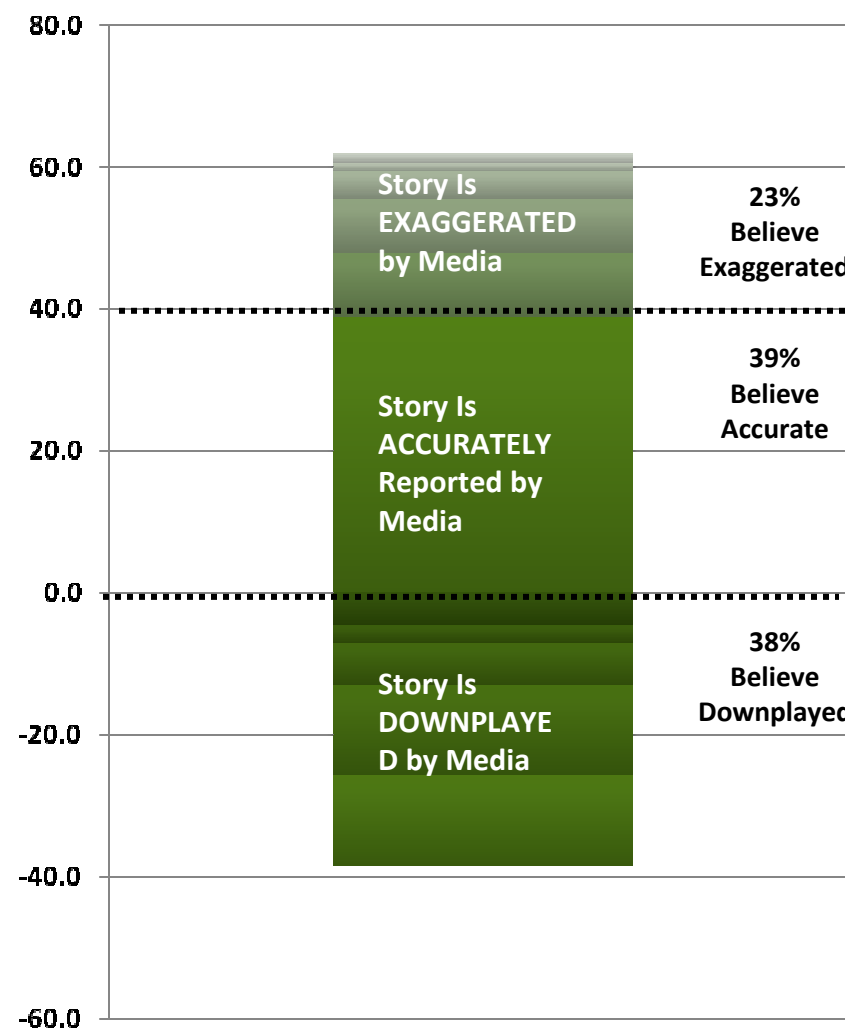


Q5. Which of the following statements best describes how familiar you are with the oil spill story in the Gulf of Mexico.

Oil Spill Primary Information Source & Belief in Source

Total Respondents (n=1003)

Source	Percent
Network TV news (e.g., CBS, ABC, NBC)	28.5
Cable TV news (e.g., CNN, Fox News, MSNBC)	24.9
Internet	19.5
Local TV news	11.1
Newspapers	8.7
Radio	5.9
Family and Friends	0.8
Magazines	0.4
None of the above	0.2



Q12. What is your number one source of information about the oil spill?

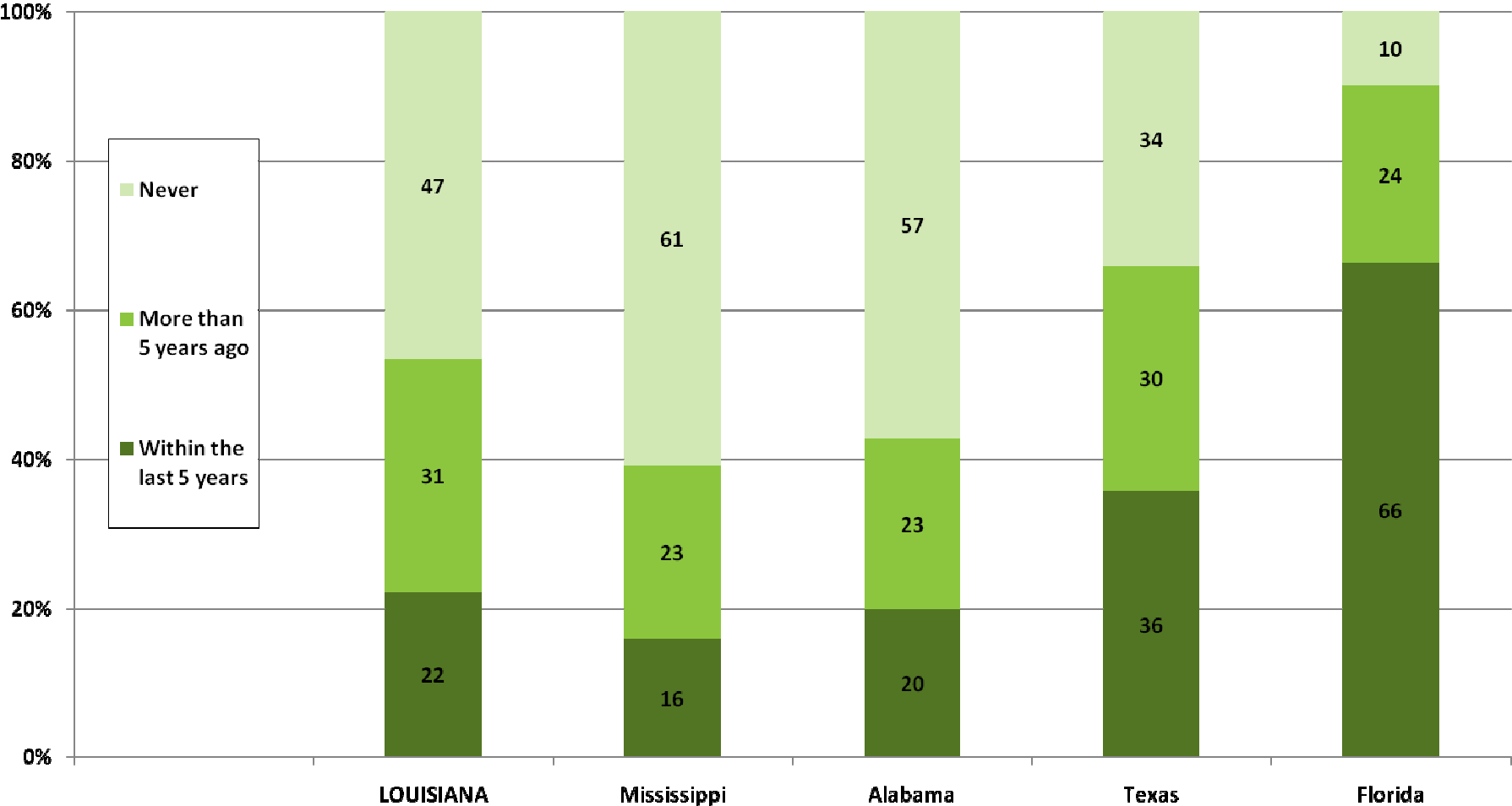
Q7. Think for a moment about all that you have seen or heard about the oil spill from all news sources, and then rate your opinion using the scale below. The damage to Louisiana is...

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 LOUISIANA & Other Gulf Coast States

Total Respondents (n=1003)



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

Respondent Profile

Total Respondents (n=1003)

Units: %

Race/Ethnicity	
White	85.0
African American/Black	4.2
Asian	3.6
Hispanic	5.0
Other	2.2
Education	
No college	8.7
Some college	18.9
College graduate	37.6
Post graduate work or degree	34.8

Household Income (in thousands of dollars)	
\$50K to under \$75K	37.8
\$75K to under \$100K	28.3
\$100K to under \$125K	16.9
\$125k or more	16.9
Age (in years)	
25-35	22.3
36-55	35.9
56 and older	41.8
Household composition	
Single, NO children at home	17.4
Single, children at home	2.1
Married/Living with partner, NO children at home	49.6
Married/Living with partner, children at home	30.9

Respondent State of Residence

Total Respondents (n=1003)

State	Percent of Respondents
California	9.2
New York	7.8
Florida	7.6
Texas	7.2
Pennsylvania	5.2
Ohio	4.4
Illinois	4.0
New Jersey	3.8
Washington	3.8
Massachusetts	3.7
Minnesota	3.3
Michigan	3.1
North Carolina	3.0
Georgia	2.7
Virginia	2.4
Maryland	2.2
Wisconsin	2.1
Oregon	2.0
Arizona	1.8
Colorado	1.7

State	Percent of Respondents
Indiana	1.6
Missouri	1.4
Iowa	1.3
South Carolina	1.3
Alabama	1.2
Tennessee	1.2
Connecticut	1.0
Kansas	1.0
Nebraska	1.0
Kentucky	0.8
Nevada	0.8
Oklahoma	0.7
West Virginia	0.7
Mississippi	0.5
Montana	0.5
New Hampshire	0.5
New Mexico	0.5
Utah	0.5
Idaho	0.4
Maine	0.3

State	Percent of Respondents
Rhode Island	0.3
Vermont	0.3
Wyoming	0.3
Alaska	0.2
Arkansas	0.2
Delaware	0.2
Hawaii	0.2
South Dakota	0.2
District of Columbia	0.1
North Dakota	0.1

Appendix

⇒ Questionnaire

Questionnaire

LOUISIANA OFFICE OF TOURISM – BP OIL SPILL SURVEY

RESEARCH OVERVIEW

What? Measuring impact of BP oil spill on perceptions of Louisiana

Who? Travelers (1,000 total)

- 25+ years old
- HH incomes \$50k+
- Take at least one paid trip a year

Where? Nationwide

How? Online survey

Revisions/Additions based on call with LOT and PAM:

1. Add question about primary source of info about oil spill – see page 7, Q12
2. Add question about media... accurate vs. exaggerated – see page 5, Q7
3. Add question about length of affect on LA – see page 7, Q11
4. Add question comparing oil spill to Katrina/Rita – see page 6, Q8
5. Delete Georgia, Add Texas to Q1 and Q2 – see page 3

Note from MDRG:

In Draft 1, Q7 on page 5 asked why NOT likely to visit Louisiana. I changed that to Q9 on page 6, which asks what would make you MORE likely to visit Louisiana.

SCREENING QUESTIONS

Intro: Standard introduction to panel members

sc1. In which of the following states do you live? [INSERT DROP DOWN LIST OF STATES]

1. Louisiana – TERMINATE

sc2. How old were you on your last birthday? [OPEN-END, NUMERIC, ACCEPT 0-99]

1. Less than 25 – TERMINATE

sc3. Which of the following categories includes your total household income before taxes?

1. Less than \$50,000 – TERMINATE
2. \$50,000-\$74,999
3. \$75,000-\$99,999
4. \$100,000-\$124,999
5. \$125,000 or more
6. Prefer not to answer – TERMINATE

sc4. Please indicate which of the following describes the industry in which you are employed. [ROTATE]

1. Marketing or Market Research – TERMINATE
2. Advertising – TERMINATE
3. Travel Industry – TERMINATE
4. Consumer Electronics Industry
5. Clothing Industry
6. Electric Utilities
7. Not Employed
8. None of the above

sc5. Which of the following best describes the role you play in making decisions about your leisure travel?

1. I am not involved in the decision making – TERMINATE
2. I share equally in the decision making with someone else
3. I am the primary decision maker

sc6. How many leisure trips have you taken in the past 12 months that included an overnight stay in a hotel/motel, bed & breakfast, condominium, or resort?

0. None – TERMINATE
1. One
2. Two
3. Three
4. Four or more

Questionnaire

MAIN QUESTIONNAIRE

Thank you for your participation! You are now beginning the main part of the survey. Please read all questions carefully before answering. Your accurate answers are very important to us.

[NEXT SCREEN]

Q1. Please indicate the last time you visited:

(ROTATED)	Within the last month	2-6 months ago	7-12 months ago	1-2 Years ago	3-5 years ago	More than 5 Years ago	Never
A. Louisiana	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. Mississippi	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. Alabama	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. Texas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E. Florida	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[NEXT SCREEN]

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:

(ROTATED)	1- Not at all Likely	2	3	4	5- Extremely Likely
A. Louisiana	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. Mississippi	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. Alabama	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. Texas	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E. Florida	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[NEXT SCREEN]

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.

The destination: (ROTATED)	1- Not at all important	2	3	4	5- Extremely important
A. Has a clean and unspoiled environment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. Has restaurants that offer superb, local cuisine	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. Has a variety of outdoor activities such as hunting, fishing, and camping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. Is safe and secure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E. Has a variety of historical and cultural attractions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
F. Has unique experiences that you cannot get anywhere else	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
G. Has interesting fairs and festivals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[NEXT SCREEN]

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. [ROTATE LIST]

LOUISIANA:	1- Do not agree at all	2	3	4	5- Strongly agree
A. Has a clean and unspoiled environment	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. Has restaurants that offer superb, local cuisine	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. Has a variety of outdoor activities such as hunting, fishing, and camping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. Is safe and secure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E. Has a variety of historical and cultural attractions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
F. Has unique experiences that you cannot get anywhere else	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
G. Has interesting fairs and festivals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[NEXT SCREEN]

Questionnaire

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

1. I am not at all familiar with the oil spill story
2. I am familiar with the oil spill, but have not followed the story
3. I am familiar with the oil spill and have followed the story somewhat
4. I am familiar with the oil spill and have followed the story closely

[NEXT SCREEN]

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.

(ROTATE)	Do not believe	Believe to be true	Not Sure
A. Louisiana oyster beds are contaminated from the oil spill	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. Commercial fishing is allowed in areas where oil is present	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. Restaurants that use Louisiana seafood are putting their customers at risk	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. The cost of Louisiana shrimp is higher because oil has to be cleaned from them before they can be sold	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E. Regulations are in place to ensure that Louisiana does not sell seafood contaminated from the oil spill	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[NEXT SCREEN]

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
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[NEXT SCREEN]

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:

1. Less
2. About the same
3. More
4. Not sure

[NEXT SCREEN]

[IF NOT LIKELY TO VISIT LOUISIANA (Q2A<4)]

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.

[ROTATE LIST]

I would be more likely to visit Louisiana if:	1- Do not agree at all	2	3	4	5- Strongly agree
A. The Louisiana coast was not contaminated with oil	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
B. Louisiana seafood were not-contaminated with oil	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
C. Deep sea fishing off the coast of Louisiana was not closed due to the oil spill	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
D. Louisiana swamp tours were not closed because of the oil spill	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
E. Louisiana wildlife – birds, alligators, etc. – could be seen as they were before the oil spill	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
F. Louisiana waterways were not closed for boating due to the oil spill	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
G. Biking and hiking trails in Louisiana had not been damaged from the oil spill	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

[NEXT SCREEN]

Questionnaire

ALL RESPONDENTS AGAIN

Q10. How has the oil spill in the Gulf of Mexico affected your leisure travel plans to Louisiana? Please select all of the statements that describe you.

The oil spill has caused me to:	Select all that apply
1. Plan a leisure trip to Louisiana [EXCLUSIVE PUNCH]	<input type="checkbox"/>
2. Cancel a leisure trip to Louisiana[EXCLUSIVE PUNCH]	<input type="checkbox"/>
3. Postpone a leisure trip to Louisiana	<input type="checkbox"/>
4. Change the areas and attractions to visit on my leisure trip to Louisiana	<input type="checkbox"/>
5. None of the above – The oil spill had no impact on my plans to take a leisure trip to Louisiana [EXCLUSIVE PUNCH]	<input type="checkbox"/>

[NEXT SCREEN]

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

1. Less than 6 months
2. 6 months to less than 1 year
3. 1 year
4. 2-5 years
5. 5-10 years
6. More than 10 years

Q12. What is your number one source of information about the oil spill? (Select one.)

1. Local TV news
2. Network TV news (e.g., CBS, ABC, NBC)
3. Cable TV news (e.g., CNN, Fox News, MSNBC, etc)
4. Internet
5. Newspapers
6. Magazines
7. Friends and family
8. Radio
9. None of the above

RESPONDENT PROFILE

D1. How would you describe yourself in terms of race/ethnicity? [ROTATE]

1. African-American/Black
2. Caucasian/White
3. Native American or Pacific Islander
4. Asian
5. Hispanic
6. More than one race/ethnicity
7. Other

D2. Which of the following best describes your final year of education?

1. Less than High School
2. High School Graduate
3. Vocational or Technical School
4. Some College
5. College Degree
6. Post Graduate work or degree

D3. Which of the following best describes your household composition?

1. Single with no children living at home
2. Single with children living at home
3. Married/Living with Partner with no children living at home
4. Married/Living with Partner with children living at home

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