

MAJORITY OPINION RESEARCH

2010 Market Perception Study

Conducted for



BEACHES OF SOUTH WALTON
Northwest Florida's Gulf Coast

November 2010

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Purpose

- **The purpose of this marketing research is to track the awareness and perceptions of Beaches of South Walton among the destination's target visitors in both core and expansion markets, as well as among target marketing groups. Additionally, this marketing research assesses the competitive leisure travel market in the minds of Beaches of South Walton target visitors and explores the criteria and planning associated with their travel decisions.**

Methodology

- **Random telephone interviews were conducted among Beaches of South Walton target visitors - as defined as enjoying travel to beach destinations, residing in an identified core or expansion market, and being classified as a target Beaches of South Walton PRIZM cluster.**

Markets

Core	Expansion
Atlanta	Houston
Baton Rouge	Orlando
Birmingham	St. Louis
Dallas	Washington DC
Huntsville	
Jackson, MS	
Memphis	
Mobile	
Montgomery	
Nashville	
New Orleans	
Tallahassee	

PRIZM Clusters

Jet Skis and Snorkels

Blue Blood Estates
Country Squires
Winner's Circle
Money & Brains
Beltway Boomers
Fast-Track Families

All About the Kids

Upward Bound
Kids & Cul-de-Sacs
New Homesteaders
Big Sky Families

Gulf Coast Sunsets

Upper Crust
Big Fish, Small Pond
Second City Elite
New Empty Nests
Pools & Patios

Relax and Reconnect

Movers & Shakers
Executive Suites
God's Country
Brite Lites, Li'l City
Greenbelt Sports
Country Casuals

Sample Size and Timing

- For this 2010 tracking wave, a total of 500 interviews was conducted between October 10 and November 4, 2010.
- With quotas set for each market and PRIZM Clusters allowed to fall naturally, interviews were segmented as:

<u>Markets</u>	<u>Number of Interviews</u>
Core	390
Expansion	110
 <u>Marketing Groups*</u>	
Jet Skis and Snorkels	149
All About the Kids	122
Gulf Coast Sunsets	124
Relax and Reconnect	105

* Grouping of PRIZM Clusters based on 2009 Beaches of South Walton PRIZM Study

Limitations

- It should be remembered that survey results are based on a sample, which is subject to "sampling error." Sampling errors arise because interviews were conducted with a sample of the population instead of with all the population. Sampling error is based on two factors: (1) the size of the sample, and (2) the actual percentage answer of a given question. The following table shows the plus or minus variation which can be expected, due to chance, with various sample sizes.

Sampling Error
(95 % level of confidence)

If Percentage Answer Is	Plus or Minus Variation:					
	<u>100</u>	<u>150</u>	<u>200</u>	<u>300</u>	<u>400</u>	<u>500</u>
5/95	± 4 pts.	± 4 pts.	± 3 pts.	± 2 pts.	± 2 pts.	± 2 pts.
10/90	6	5	4	3	3	3
20/80	8	7	6	5	4	4
30/70	9	7	6	5	5	4
40/60	10	8	7	6	5	4
50/50	10	8	7	6	5	4

Report Format

- On the following pages, Conclusions are presented, followed by the Tabular Findings. A copy of the questionnaire is presented in the appendix of the report.



Represents a number that is significantly higher



Represents a number that is significantly lower



Are also used to note significant differences

Conclusions

Conclusions

- **Unaided awareness of Beaches of South Walton as a place for a vacation remains low at less than 0.05% by brand name and at 3% when factoring in the awareness of individual beach communities, compared to 29% for Destin, 15% for Gulf Shores/Orange Beach and 14% for Panama City Beach.**
- **Name recognition for Beaches of South Walton (49%) remains lower than that of Panama City Beach (87%), Destin (83%), Hilton Head Island (81%), Gulf Shores/Orange Beach (79%), and the Caribbean (71%). However, when factoring in both Beaches of South Walton by name, as well as recognition of the 15 individual beach communities, awareness of the destination rises to 92%, which is higher than the competition. In a 'win-win' combination, awareness of the destination brand (Beaches of South Walton) increases with the inclusion of the beach communities and each individual beach community's awareness is increased when coupled with Beaches of South Walton – from a 42% increase for Sandestin up to a 1,050% increase for Alys Beach.**
- **New to the 2010 researched competitive set, both Sea Island and Kiawah Island have name recognition lower than Beaches of South Walton by that name alone.**

Conclusions

- **Nearly half of the target prospects for Beaches of South Walton in surveyed markets (49%) have visited the destination, but less than half of those (22%) knew they were in Beaches of South Walton at the time. Visitation reaches nearly 60% in the core markets, but the lack of knowledge that visitors are in Beaches of South Walton (28% knew they were there) remains.**
- **Currently 12% of those who visit Beaches of South Walton believe they are in Destin at the time. Taking this into account, Beaches of South Walton has a 46% market share among its target prospects, while Destin has 20% of the market, Gulf Shores/Orange Beach has 15%, Panama City Beach has 13%, the Caribbean Islands have 4% and Hilton Head Island has 2%. Currently, neither Sea Island or Kiawah Island are garnering any measurable share among Beaches of South Walton's target audience. The Beaches of South Walton share of the market has been steadily increasing from 24% in 2007 to 28% in 2008, to 35% in 2009, to 46% in 2010.**

Conclusions

- When planning a beach vacation, Beaches of South Walton prospects say they place highest importance on clean, well maintained beaches, followed by a place in which they feel comfortable, quality accommodations, a pleasant place to relax and unwind, value for the travel dollar, and scenic beauty.
- Beaches of South Walton receives its highest ratings among prospects for having clean, well maintained beaches, being a place visitors feel comfortable and being a pleasant place to relax and unwind. However, there are sizable gaps in vacation decision makers' perceptions of Beaches of South Walton's delivery on stated desires: Clean, well maintained beaches (perceived delivery 16 points lower than stated desires); a place they would feel comfortable (-15); value for the travel dollar (-15); quality accommodations (-14); scenic beauty (-12) and being a pleasant place to relax and unwind (-11). When we filter perceptions among just those who have visited Beaches of South Walton, the gap between expectations and delivery closes an average of 5 percentage points.

Conclusions

- From the entire market of prospects (whom we want to attract), Beaches of South Walton is currently seen as similar or below other beach destinations in the competitive set that these prospects have visited (where we need to lure them away from). However when we do an 'apples to apples' comparison (those who have visited Beaches of South Walton compared to those who have visited each of the other destinations), Beaches of South Walton does move toward the top on most attributes.
- Within the competitive set, Kiawah Island stands out on many of the vacation experience attributes, but those ratings are among a very small base of travelers, whereas the Caribbean stands out among a larger group of prospects. Close to home, Gulf Shores/Orange Beach and Panama City Beach stand out for being easy to get to and for value, while Destin does not stand out as being particularly different on any of the measures. Ultimately, perceptions of the most important offerings (a place visitors feel comfortable, quality accommodations, a pleasant place to relax and unwind, value for the travel dollar and scenic beauty) all need boosting in the minds of target beach travelers to lure them away from their current destinations.

Conclusions

- **Two out of ten target prospects for the Beaches of South Walton (21%) recalled seeing the destination's advertising over the past 12 months. This is consistent with previous years but also significantly lower than the reach many of our competitors are getting with 'our' audience: Gulf Shores/Orange Beach (50%), Destin (43%), Caribbean Islands (42%), Panama City Beach (41%), and Hilton Head Island (36%). By contrast both Sea Island and Kiawah Island are only reaching 6% of our audience.**
- **While recall of the Beaches of South Walton's advertising among prospects is statistically flat against previous years, Gulf Shores/Orange Beach's and Panama City Beach's increased; it is important to keep the record of advertising recall among our visitors as documented in the Visitor Tracking Study in mind. Consequently, we can see that the use of BP grant money by the Beaches of South Walton was targeted to reach the most likely visitors that needed a messaging boost to have the confidence to make the trip, rather than casting a wider net to prospects that would have had less impact.**

Conclusions

- Those who recalled the Beaches of South Walton advertising not only have higher awareness of “Beaches of South Walton,” but also of Sandestin, Seaside, Rosemary Beach, WaterColor, WaterSound and Alys Beach. Additionally, those who recall the ads were more likely to have visited this past year, have a higher overall perception of the destination as well as eight of the seventeen measured vacation experience attributes. Further, they are more likely to visit in the next year or so than are those who did not see or hear the ads.
- 12% of the Beaches of South Walton’s target prospects were touched by an element of public relations during the previous 12 months. While this represents a 50% increase over last year, it remains below the reach our competitors are getting with ‘our’ audience: Gulf Shores/Orange Beach (37%), Caribbean Islands (31%), Panama City Beach (31%), Destin (27%), and Hilton Head Island (21%). As was the case with advertising, neither Kiawah Island (4%) nor Sea Island (3%) have reached many in our target areas.

Conclusions

- Those who were touched by the Beaches of South Walton public relations efforts not only have higher awareness of “Beaches of South Walton,” but also of Sandestin, Seaside, Rosemary Beach, WaterColor, WaterSound and Alys Beach. Additionally, those touched by PR were more likely to have visited this past year, have a higher overall perception of the destination as well as six of the seventeen measured vacation experience attributes. Further, they are more likely to visit in the next year or so than are those who were not touched by PR.
- 5% of the Beaches of South Walton target prospects in surveyed markets visited beachesofsouthwalton.com in the past 12 months. This level of website visitation is consistent with previous years, but lower than visits to the websites of Gulf Shores/Orange Beach, Destin, and the Caribbean Islands. Those who visited the Beaches of South Walton website not only have higher awareness of “Beaches of South Walton,” but also of Sandestin, Seaside, Rosemary Beach, WaterColor, WaterSound and Alys Beach. Additionally, website visitors were more likely to have visited this past year, have a higher overall perception of the destination as well as of seven of the seventeen measured vacation experience attributes. They are also more likely to visit in the next year or so.

Conclusions

- **45 % of Beaches of South Walton target prospects use magazines for vacation ideas or planning. The most common magazine utilized is Travel + Leisure (18 %), followed by Southern Living (14 %).**
- **Three out of four Beaches of South Walton target prospects use the Internet to aid in travel decisions. The most common practice is to search for specific destinations and see which websites come up (59%), followed by typing in the website address for specific destinations (36%), searching with words that describe the vacation being looked for (32%), searching for specific properties and seeing which websites come up (30%), and typing in the individual website address of specific properties (28%).**
- **Two-thirds of Beaches of South Walton target prospects (66 %) use websites for vacation ideas and planning, Expedia is by far the most used website (44%), followed by Yahoo Travel (18%) and Trip Advisor (16%).**

Conclusions

- **Two in ten Beaches of South Walton target prospects (21 %) use social media for vacation ideas or planning. Facebook is the most utilized site (20 %), followed by YouTube (10 %).**
- **Two in ten Beaches of South Walton target prospects (21%) have either an iPhone or an iPad and thus could utilize a Beaches of South Walton app if one were to be developed.**
- **Half of the Beaches of South Walton target prospects plan to travel somewhere next spring (March, April, May 2011). Eight out of ten have yet to decide where they will visit and thus are open to the influence of our messaging. The optimum time to reach these potential visitors is first quarter 2011.**
- **Two-thirds of the Beaches of South Walton target prospects plan to travel somewhere next summer (June, July, August 2011). Nine out of ten have yet to decide where they will visit and thus are open to the influence of our messaging. The optimum time to reach these potential visitors is late first quarter and throughout second quarter 2011.**

Conclusions

- Slightly more than two out of ten target prospects for Beaches of South Walton (22%) plan to visit the destination in the next year or two. Given the confusion factor with Destin, this could mean as many as 27% plan to visit, which puts us second only to Destin (39% or perhaps 34%) and Gulf Shores/Orange Beach (37%).
- Based on a description of the destination, seven in ten prospects (71%) are interested in visiting Beaches of South Walton. This is up significantly from last year (62%), which was up itself from the previous year (54%).
- Despite the opening of the Northwest Florida Beaches International Airport and the introduction of Southwest Airlines into the market, three out of four target prospects interested in visiting Beaches of South Walton still prefer to drive. In fact, the preference for driving (75%) is up from last year's 69%, which was up from the previous year's 57%.
- Only one in four prospects (23%) say that "green" or environmentally friendly options would make them more likely to visit a beach destination.

Conclusions

- **Three in ten of our best prospects (29%) think Beaches of South Walton is impacted by the Gulf Oil Spill today. In just the surveyed markets alone this means more than 1.8 million of our specific target households (not just the general public) believes that the beaches are impacted today. The most common perception is that there are large patches of oil on the beach (13%), followed by ocean water quality issues (8%). Factor in the average party size of 4.3 persons and there are more than 8 million potential visitors that we are trying to persuade to visit possibly being deterred from visiting because they believe the beaches are impacted by oil today.**
- **15% believe that Beaches of South Walton will be impacted next spring/summer. In just the surveyed markets alone this means more than 972,000 of our specific target households believe that the beaches will be impacted next year. Overlay the average party size of 4.3 persons and we have more than 4 million qualified target potential visitors that we are trying to persuade to visit who may be deterred from visiting because of lingering effects of the oil spill.**

Conclusions

- To counter the negative perceptions lingering from the oil spill, potential visitors want assurances from government/environmental agencies that the beaches, air and water are safe, as well as news reports and scientific data saying they are.
- Prospects consider local television news, family/friends/co-workers and newspapers to be the most credible sources of information about the beaches in Beaches of South Walton.
- As we consider the strengths and weaknesses of the Beaches of South Walton brand name, as well as some associated phrasing, it is important to note the most common association among target prospects is “nothing” – Santa Rosa Beach (69% nothing), The Secret Beach (67%), Beaches of South Walton (42%), and Northwest Florida’s Gulf Coast (26%). Positive associations for Beaches of South Walton are white sand (12%) and Seaside (12%).

Tabular Findings

Awareness

Current Unaided Awareness

		PRIZM Marketing Group							
	(Base)	<u>Total</u> (500)	<u>Market Type</u>		<u>Jet Skis and</u> <u>Snorkels</u> (149)	<u>All About</u> <u>the Kids</u> (122)	<u>Gulf Coast</u> <u>Sunsets</u> (124)	<u>Relax and</u> <u>Reconnects</u> (105)	
			<u>Core</u> (390)	<u>Expansion</u> (110)					
<u>Unaided</u>		<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	
Destin		29	34	←	10	33	29	27	26
Gulf Shores/Orange Beach		15	19	←	1	9	23	15	13
Panama City Beach		14	18	←	1	11	24	9	13
Hawaii		6	6		6	7	2	4	12
Caribbean Islands		6	7		4	5	8	6	6
Myrtle Beach		6	5		8	4	8	5	6
Mexico		5	4		8	3	5	5	6
Miami		4	4		3	4	8	2	2
Pensacola		4	4		3	3	7	3	2
<u>Net Beaches of South Walton</u>		<u>3</u>	<u>4</u>	←	<u>1</u>	<u>5</u>	<u>2</u>	<u>3</u>	<u>3</u>
Beaches of South Walton		*	1		-	1	-	-	-
One of the 15 Communities**		3	3		1	4	2	3	3
Daytona Beach		3	3		4	4	2	3	3
Hilton Head Island		3	3	←	-	3	2	3	3

(Miscellaneous mentions of 1% or less not shown)

* Less than 0.5%

** Sandestin 1%; Seaside 1%; *Individual mentions*: Miramar, Seacrest, Blue Mountain, Dune Allen, Rosemary Beach, Seagrove, WaterColor

Q. What beach destinations come to mind as a place for a vacation or leisure trip? (DO NOT READ LIST. MULTIPLE ANSWERS ALLOWED.)

Unaided Awareness Trend

	(Base)	<u>2007</u> (511)	<u>2008</u> (500)	<u>2009</u> (500)	<u>2010</u> (500)
<u>Unaided</u>		<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Destin		17	17 →	24 →	29
Gulf Shores/Orange Beach		8	10 →	15	15
Caribbean Islands		12	10	11 ←	6
Panama City Beach		7	7	8 →	14
Hawaii		14	12	7	6
Mexico		8	10	7	5
<u>Net Beaches of South Walton</u>		<u>NC</u>	<u>NC</u>	<u>4</u>	<u>3</u>
<u>Beaches of South Walton</u>		<u>1</u>	<u>1</u>	<u>2</u>	<u>*</u>
<u>One of the 15 Communities</u>		<u>NR</u>	<u>NR</u>	<u>2</u>	<u>3</u>
Myrtle Beach		5	3	5	6
Daytona Beach		2	3	3	3
Hilton Head Island		5	4	3	3

NR = Not Recorded; NC = Not Calculated

Q. What beach destinations come to mind as a place for a vacation or leisure trip? (DO NOT READ LIST. MULTIPLE ANSWERS ALLOWED.)

Current Claimed Awareness

PRIZM Marketing Group								
(Base)	Total (500)	Market Type			Jet Skis and Snorkels (149)	All About the Kids (122)	Gulf Coast Sunsets (124)	Relax and Reconnects (105)
		Core (390)	Expansion (110)					
		%	%	%				
Unaided	%	%		%	%	%	%	%
Net Beaches of South Walton	92	95	←	81	91	94	93	90
Sandestin	65	75	←	30	65	62	71	61
Miramar	57	58		53	57	56	62	54
Beaches of South Walton	49	56	←	21	52	47	50	43
Seaside	46	52	←	25	52	34	47	49
Seascape	33	36	←	21	37	33	28	31
Seagrove	29	36	←	4	30	27	28	29
Rosemary Beach	26	32	←	6	30	24	26	22
Seacrest	25	30	←	9	29	15	33	20
Grayton	21	27	←	-	25	10	26	21
WaterColor	19	23	←	4	24	11	19	20
Blue Mountain	15	18	←	4	15	13	20	9
Inlet Beach	12	13		8	15	8	18	6
WaterSound	11	13	←	5	17	3	14	9
Dune Allen	9	11		5	13	5	14	3
Alys Beach	8	10	←	3	11	6	10	7
Panama City Beach	87	91	←	71	88	86	84	88
Destin	83	90	←	60	76	87	87	85
Hilton Head Island	81	82		77	81	75	88	77
Gulf Shores/Orange Beach	79	88	←	47	75	86	79	76
Caribbean Islands	71	73		67	70	64	82	70
Sea Island	27	31	←	11	36	14	34	20
Kiawah Island	21	23	←	12	28	11	22	20

Q. Have you heard of (READ AND RANDOMIZE LIST)?

Claimed Awareness Trend

	(Base)	<u>2007</u> (511)	<u>2008</u> (500)	<u>2009</u> (500)	<u>2010</u> (500)
<u>Checklist</u>		<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
<u>Net Beaches of South Walton</u>		<u>NC</u>	<u>NC</u>	<u>89</u>	<u>92</u>
Sandestin		NA	NA	69	65
Miramar		NA	NA	55	57
<u>Beaches of South Walton</u>		<u>52</u>	<u>53</u>	<u>53</u>	<u>49</u>
Seaside		NA	NA	56	46 ←
Seascape		NA	NA	41	33 ←
Seagrove		NA	NA	41	29 ←
Rosemary Beach		NA	NA	32	26 ←
Seacrest		NA	NA	29	25
Grayton		NA	NA	29	21 ←
WaterColor		NA	NA	24	19 ←
Blue Mountain		NA	NA	18	15
Inlet Beach		NA	NA	13	12
WaterSound		NA	NA	13	11
Dune Allen		NA	NA	13	9
Alys Beach		NA	NA	12	8
Panama City Beach		81	81	83	87
Destin		78	78	84	83
Hilton Head Island		87	86	79	81
Gulf Shores/Orange Beach		76	78	81	79
Caribbean Islands		89	86	79	71 ←
Sea Island		NA	NA	NA	27
Kiawah Island		NA	NA	NA	21

Q. Have you heard of (READ AND RANDOMIZE LIST)? NA = Not Recorded; NC = Not Calculated

Visitation

Ever Visited

		PRIZM Marketing Group							
		Market Type			Jet Skis and	All About	Gulf Coast	Relax and	
	(Base)	Total	Core	Expansion	Snorkels	the Kids	Sunsets	Reconnects	
		(500)	(390)	(110)	(149)	(122)	(124)	(105)	
<u>Unaided</u>		<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	
Destin		58	67	←	24	56	57	64	53
Panama City Beach		52	61	←	22	50	60	52	47
Gulf Shores/Orange Beach		50	60	←	12	44	56	56	43
<u>Net Beaches of South Walton</u>		<u>49</u>	<u>59</u>	←	<u>15</u>	<u>53</u>	<u>45</u>	<u>55</u>	<u>41</u>
Beaches of South Walton		22	28	←	1	23	19	22	24
One of the 15 Communities		34	41	←	14	46	26	43	27
Caribbean Islands		33	31		38	39	19	38	34
Hilton Head Island		27	29		22	33	16	35	23
Sea Island		6	7	←	-	9	2	8	4
Kiawah Island		4	4		3	5	2	5	3

Visited This Year

		PRIZM Marketing Group						
(Base)	<u>Total</u> (500)	Market Type		<u>Jet Skis and</u> <u>Snorkels</u> (149)	<u>All About</u> <u>the Kids</u> (122)	<u>Gulf Coast</u> <u>Sunsets</u> (124)	<u>Relax and</u> <u>Reconnects</u> (105)	
		<u>Core</u> (390)	<u>Expansion</u> (110)					
<u>Unaided</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	
<u>Net Beaches of South Walton</u>	<u>17</u>	<u>21</u>	← <u>3</u>	<u>31</u>	<u>8</u>	<u>20</u>	<u>21</u>	
Beaches of South Walton	3	4	← -	3	4	4	3	
One of the 15 Communities	14	17	← 3	<u>28</u>	<u>4</u>	16	18	
Destin	11	13	← 4	10	12	8	15	
Gulf Shores/Orange Beach	8	10	← -	5	14	8	5	
Panama City Beach	7	9	← -	5	12	7	6	
Caribbean Islands	2	2	3	4	-	3	2	
Hilton Head Island	1	2	← -	1	2	1	2	
Sea Island	*	1	-	-	-	1	1	
Kiawah Island	-	-	-	-	-	-	-	

* Less than 0.5%

Q. When was your last visit to (DESTINATION)?

Geographical Confusion & Corrections

		Among Those <u>Who Visited</u> (256)			Among <u>Total Targets</u> (500)
		<u>%</u>			<u>%</u>
<u>Reported Visiting Destin</u>		<u>100</u>			<u>51</u>
Stayed at a property in Walton County		12			5
					↙
Visited This Year:	Destin	<u>Reported</u> <u>%</u> 11	<u>Confusion</u> <u>%</u> - 5	=	<u>Actual</u> <u>%</u> 6
	Beaches of South Walton	13	+ 5	=	18

Market Share

	(Base)	<u>2007</u> (511) <u>%</u>	<u>2008</u> (500) <u>%</u>	<u>2009</u> (500) <u>%</u>	<u>2010</u> (500) <u>%</u>
Beaches of South Walton		24	28 →	35 →	46
Destin		14	← 3	→ 12	→ 20
Gulf Shores/Orange Beach		21	23	25	← 15
Panama City Beach		12	17	14	13
Caribbean Islands		19	20	← 8	4
Hilton Head Island		10	9	6	2
Sea Island		NA	NA	NA	-
Kiawah Island		NA	NA	NA	-

Expectations & Perceptions

Stated Importance of Vacation Offerings

(Percent of Potential*)

		PRIZM Marketing Group						
		Market Type		Jet Skis and	All About	Gulf Coast	Relax and	
	(Base)	Total	Core	Expansion	Snorkels	the Kids	Sunsets	Reconnects
		(500)	(390)	(110)	(149)	(122)	(124)	(105)
<u>Checklist</u>		<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Clean, well maintained beaches		95	94	96	95	94	95	95
Place you feel comfortable		94	94	96	94	97	92	96
Quality accommodations		91	91	90	91	91	89	92
Pleasant place to relax and unwind		90	90	90	92	91	88	90
Value for the travel dollar		90	90	90	86	97	86	93
Scenic beauty		89	89	90	91	90	86	91
Good place for a family vacation		86	86	85	89	93	81	80
Customer service		86	86	86	85	89	83	88
Easy to get to		82	82	85	81	85	81	83
Quality dining		79	80	77	78	79	80	82
Good ocean swimming		76	76	76	80	75	70	79
Place that's different and unique		72	71	75	74	70	71	69
Activities other than the beach		69	68	72	68	75	65	68
Interesting places to shop		63	63	63	62	67	58	66
Cultural events/festivals		54	54	55	49	54	55	61
Spa resorts		51	51	52	50	50	54	52
Golf		32	34	29	32	33	28	38

* Percent of Potential: Mean rating divided by the maximum possible rating on 10-point scale.

Q. Using a ten-point scale where 10 means "very important" and 1 means "not at all important," how important are each of the following to you when planning a trip to a beach destination? (READ AND RANDOMIZE LIST.)

Current Overall Destination Ratings

(Percent of Potential*)

		PRIZM Marketing Group						
	(Base)	Total (500)	Market Type		Jet Skis and Snorkels (149)	All About the Kids (122)	Gulf Coast Sunsets (124)	Relax and Reconnects (105)
			Core (390)	Expansion (110)				
Checklist		%	%	%	%	%	%	%
Caribbean Islands		81	82		81	79	78	86
Destin		79	80	←	80	81	74	80
Hilton Head Island		75	75		75	74	79	69
Gulf Shores/Orange Beach		74	77	←	70	81	72	75
Beaches of South Walton		70	73	←	72	69	67	74
Panama City Beach		69	70		65	79	65	67
Kiawah Island		63	66	←	68	59	63	63
Sea Island		62	64	←	66	62	56	62

* Percent of Potential: Mean rating divided by the maximum possible rating on 10-point scale.

Q. Now using a ten-point scale, where 10 means “excellent” and 1 means “poor,” how would you rate (DESTINATION) overall as a place for a vacation or leisure trip?

Overall Destination Rating Trend

(Percent of Potential*)

	(Base)	<u>2007</u> (511)	<u>2008</u> (500)	<u>2009</u> (500)	<u>2010</u> (500)
<u>Checklist</u>		<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Caribbean Islands		80	79	82	81
Destin		75	74	78	79
Hilton Head Island		72	72	76	75
Gulf Shores		69	70	75	74
Beaches of South Walton		66	67	71	70
Panama City Beach		61	62	65	69
Kiawah Island		NA	NA	NA	63
Sea Island		NA	NA	NA	62

* Percent of Potential: Mean rating divided by the maximum possible rating on 10-point scale.

Q. Now using a ten-point scale, where 10 means "excellent" and 1 means "poor," how would you rate (DESTINATION) overall as a place for a vacation or leisure trip?

Beaches of South Walton Attribute Ratings

(Top 3 Box*)

		PRIZM Marketing Group						
	(Base)	Market Type			Jet Skis and Snorkels (149)	All About the Kids (122)	Gulf Coast Sunsets (124)	Relax and Reconnects (105)
		Total (500)	Core (390)	Expansion (110)				
<u>Checklist</u>		<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Clean, well maintained beaches		52	54		52	53	48	55
Place you feel comfortable		50	55	←	53	51	43	54
Pleasant place to relax and unwind		50	53	←	48	53	48	52
Easy to get to		48	50		50	48	50	45
Good place for a family vacation		48	51	←	49	50	43	50
Quality accommodations		48	50	←	43	54	47	48
Scenic beauty		47	50		43	49	45	54
Value for the travel dollar		42	46	←	40	40	40	51
Customer service		42	45	←	39	41	38	54
Good ocean swimming		41	43	←	44	39	37	44
Quality dining		37	39		35	38	37	40
Place that's different and unique		30	30		30	29	30	34
Interesting places to shop		28	31		26	37	21	31
Activities other than the beach		28	28		29	28	26	28
Spa resorts		20	22		16	21	21	23
Golf		17	19		18	14	15	23
Cultural events/festivals		15	16		15	7	22	19

* A rating of 8, 9 or 10 on 10-point scale, where 10 is the highest and 1 is the lowest.

Q. Using the same scale, how would you rate (DESTINATION) on: (READ AND RANDOMIZE LIST)?

Beaches of South Walton Attribute Ratings

(Percent of Potential*)

		PRIZM Marketing Group						
	(Base)	Market Type			Jet Skis and Snorkels (149)	All About the Kids (122)	Gulf Coast Sunsets (124)	Relax and Reconnects (105)
		Total (500)	Core (390)	Expansion (110)				
<u>Checklist</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	
Place you feel comfortable	79	81	←	72	81	79	74	83
Clean, well maintained beaches	79	80		75	80	81	74	82
Pleasant place to relax and unwind	79	80	←	73	79	80	76	81
Good place for a family vacation	78	79		75	80	80	73	80
Quality accommodations	77	78		75	77	80	74	80
Scenic beauty	77	78		73	76	79	73	81
Easy to get to	77	78		73	78	76	75	78
Customer service	75	76		72	77	75	70	80
Value for the travel dollar	75	76		72	75	76	70	80
Good ocean swimming	72	72		70	77	68	68	74
Quality dining	72	73		68	71	71	69	77
Interesting places to shop	66	67		62	66	70	62	68
Place that's different and unique	66	65		69	68	65	64	67
Activities other than the beach	65	66		65	67	66	62	66
Spa resorts	60	61		57	62	58	60	61
Cultural events/festivals	58	58		60	59	54	60	59
Golf	49	50		46	53	45	43	58

* Percent of Potential: Mean rating divided by the maximum possible rating on 10-point scale.

Q. Using the same scale, how would you rate (DESTINATION) on: (READ AND RANDOMIZE LIST)?

BSW Attribute Ratings Trend

(Percent of Potential*)

	<u>2007</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
(Base)	(511)	(500)	(500)	(500)
<u>Checklist</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Clean, well maintained beaches	74	74	→ 83	79
Good place for a family vacation	73	71	→ 82	78
Place you feel comfortable	72	74	→ 82	79
Pleasant place to relax and unwind	71	73	→ 82	79
Scenic beauty	71	71	→ 80	77
Quality accommodations	72	71	→ 80	77
Easy to get to	71	71	→ 79	77
Value for the travel dollar	70	70	→ 78	75
Good ocean swimming	69	67	→ 77	72
Customer service	NA	68	→ 76	75
Quality dining	69	67	→ 75	72
Activities other than the beach	60	62	67	65
Interesting places to shop	60	61	66	66
Place that's different and unique	60	59	→ 66	66
Cultural events/festivals	52	51	→ 59	58
Spa resorts	52	52	→ 58	60
Golf	52	49	47	49
<i>Average Score</i>	<i>66</i>	<i>65</i>	<i>→ 73</i>	<i>71</i>

* Percent of Potential: Mean rating divided by the maximum possible rating on 10-point scale.

Q. Using the same scale, how would you rate (DESTINATION) on: (READ AND RANDOMIZE LIST)?

BSW 2010 Perception Gap Analysis

<u>Checklist</u>	<u>Importance</u> %	<u>Performance</u> %	<u>Gap</u> %
Clean, well maintained beaches	95	79	-16
Place you feel comfortable	94	79	-15
Value for the travel dollar	90	75	-15
Quality accommodations	91	77	-14
Scenic beauty	89	77	-12
Pleasant place to relax and unwind	90	79	-11
Customer service	86	75	-11
Good place for a family vacation	86	78	-8
Quality dining	79	72	-7
Place that's different and unique	72	66	-6
Easy to get to	82	77	-5
Good ocean swimming	76	72	-4
Activities other than the beach	69	65	-4
Interesting places to shop	63	66	+3
Cultural events/festivals	54	58	+4
Spa resorts	51	60	+9
Golf	32	49	+17

Comparative Destination Perceptions

(Percent of Potential*)

Among Beaches of South Walton Targets

Been To:

Checklist	Market View: Beaches of South Walton		Been To: Beaches of South Walton	Been To:						
	%		%	Destin	Gulf Shores	Hilton Head Island	Sea Island	Kiawah Island	Panama City Beach	Caribbean Islands
	%		%	%	%	%	%	%	%	%
Place you feel comfortable	79	→	88	80	86	84	86	92	86	84
Clean, well maintained beaches	79	→	86	84	84	84	84	90	85	90
Pleasant place to relax and unwind	79	→	87	81	85	83	88	92	82	90
Good place for a family vacation	78	→	85	83	84	80	80	90	86	77
Quality accommodations	77	→	83	81	83	87	83	89	83	84
Scenic beauty	77	→	84	81	82	83	88	92	84	93
Easy to get to	77	→	85	79	86	72	66	64	86	69
Customer service	75	→	82	79	76	85	85	88	83	84
Value for the travel dollar	75	→	81	76	79	70	68	76	83	80
Good ocean swimming	72	→	78	82	76	74	70	75	79	90
Quality dining	72	→	78	76	72	84	78	83	78	81
Interesting places to shop	66		70	71	72	75	69	68	73	77
Place that's different and unique	66		66	70	69	74	81	84	71	84
Activities other than the beach	65		66	68	75	76	70	74	78	76
Spa resorts	60		61	65	65	70	72	70	62	69
Cultural events/festivals	58		60	62	63	67	61	69	61	65
Golf	49	→	58	46	58	66	62	75	42	48

* Percent of Potential: Mean rating divided by the maximum possible rating on 10-point scale.

Q. Using the same scale, how would you rate (DESTINATION) on: (READ AND RANDOMIZE LIST)?

Communications

Current Advertising Recall

		PRIZM Marketing Group						
	(Base)	Market Type			Jet Skis and Snorkels (149)	All About the Kids (122)	Gulf Coast Sunsets (124)	Relax and Reconnects (105)
		Total (500)	Core (390)	Expansion (110)				
Checklist		%	%	%	%	%	%	%
Gulf Shores/Orange Beach		50	61	←	46	52	54	47
Destin		43	51	←	40	37	51	47
Caribbean Islands		42	41		43	35	42	49
Panama City Beach		41	45	←	45	38	48	33
Hilton Head Island		36	36		36	34	37	35
Sandestin		30	36	←	34	17	38	29
Beaches of South Walton		21	26	←	22	17	25	19
Seaside		13	16	←	13	8	17	13
Rosemary Beach		9	11	←	12	2	14	7
WaterColor		9	11	←	11	4	13	6
Sea Island		6	7	←	8	2	9	6
Kiawah Island		6	7	←	7	3	6	6
WaterSound		4	5		6	1	5	4
Alys Beach		2	3		3	2	3	1

Q. For which of the following beach destinations have you seen or heard advertising for in the past 12 months? (READ AND RANDOMIZE LIST)

Advertising Recall Trend

	(Base)	<u>2007</u> (511)	<u>2008</u> (500)	<u>2009</u> (500)	<u>2010</u> (500)
<u>Checklist</u>		<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Gulf Shores/Orange Beach		43	43	39 →	50
Destin		45	44	41	43
Caribbean Islands		73 ←	66 ←	48 ←	42
Panama City Beach		37	37 ←	31 →	41
Hilton Head Island		47	44	39	36
Sandestin		NA	NA	30	30
Beaches of South Walton		22	20	18	21
Seaside		NA	NA	21 ←	13
Rosemary Beach		NA	NA	11	9
WaterColor		NA	NA	10	9
Sea Island		NA	NA	NA	6
Kiawah Island		NA	NA	NA	6
WaterSound		NA	NA	3	4
Alys Beach		NA	NA	4	2

Q. For which of the following beach destinations have you seen or heard advertising for in the past 12 months? (READ AND RANDOMIZE LIST)

Source of Advertising Recall

Among Beaches of South Walton Targets

	Beaches of South Walton	<u>Destin</u>	<u>Gulf Shores</u>	<u>Hilton Head Island</u>	<u>Sea Island</u>	<u>Kiawah Island</u>	<u>Panama City Beach</u>	<u>Caribbean Islands</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
<u>Recall Advertising</u>	<u>21</u>	<u>43</u>	<u>50</u>	<u>36</u>	<u>6</u>	<u>6</u>	<u>41</u>	<u>42</u>
<u>Source of Recall</u>								
Magazine	13	24	24	22	4	5	16	23
Television	10	17	28	11	*	*	22	21
Internet	3	6	7	3	1	*	6	7
Newspaper	3	5	6	3	*	*	5	3
Radio	2	3	7	1	*	*	3	1
Billboard	1	3	4	2	*	*	2	1

* Less than 0.5%

Q. As best you recall, was the advertising you saw for [DESTINATION] in a magazine, in a newspaper, on television, on the radio, on the Internet, or on a billboard?

Impact of BSW Advertising

<u>Measure</u>	<u>Beaches of South Walton Ads</u>	
	<u>Saw</u> %	<u>Did Not See</u> %
Aware of Beaches of South Walton	100	35
Aware of Sandestin	88	59
Aware of Seaside	77	38
Aware of Rosemary Beach	58	17
Aware of WaterColor	48	11
Aware of WaterSound	30	6
Aware of Alys Beach	22	5
Visited Beaches of South Walton this year	15	-
Overall destination rating	81	65
Place visitor feels comfortable	87	77
Clean well maintained beaches	86	77
Pleasant place to relax and unwind	87	76
Quality accommodations	82	76
Scenic beauty	85	74
Place that's easy to get to	82	75
Value for the travel dollar	82	73
Quality dining	77	70
Very likely to visit in next year or so	24	3
Interested in destination description	78	69

Past 12 Months Public Relations Touch

				PRIZM Marketing Group			
(Base)	<u>Total</u> (500)	<u>Market Type</u>		<u>Jet Skis and</u> <u>Snorkels</u> (149)	<u>All About</u> <u>the Kids</u> (122)	<u>Gulf Coast</u> <u>Sunsets</u> (124)	<u>Relax and</u> <u>Reconnects</u> (105)
		<u>Core</u> (390)	<u>Expansion</u> (110)				
<u>Checklist</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Gulf Shores/Orange Beach	37	45	← 9	31	43	43	32
Caribbean Islands	31	31	32	36	25	29	34
Panama City Beach	31	32	26	30	27	38	27
Destin	27	31	← 15	31	16	34	29
Hilton Head Island	21	21	23	24	13	29	18
Sandestin	14	18	← 1	16	3	19	17
Beaches of South Walton	12	15	← 1	15	9	13	10
Seaside	8	9	← 3	9	6	10	8
Rosemary Beach	5	6	← 1	9	-	4	6
Kiawah Island	4	4	4	3	3	5	4
WaterColor	4	4	2	4	2	4	5
Sea Island	3	3	3	3	1	5	4
WaterSound	1	2	-	3	-	2	-
Alys Beach	1	1	1	3	-	1	-

Q. For which of the following beach destinations have you seen an article written about or seen or heard a television segment about in the past 12 months? (READ AND RANDOMIZE LIST)

Public Relation Touch Trend

<u>Checklist</u>	(Base)	<u>2008</u> (500) %		<u>2009</u> (500) %		<u>2010</u> (500) %
Gulf Shores/Orange Beach		24	←	17	→	37
Caribbean Islands		41	←	24	→	31
Panama City Beach		16		12	→	31
Destin		25	←	19	→	27
Hilton Head Island		29	←	19		21
Sandestin		NA		12		14
Beaches of South Walton		11		8		12
Seaside		NA		11		8
Rosemary Beach		NA		7		5
Kiawah Island		NA		NA		4
WaterColor		NA		5		4
Sea Island		NA		NA		3
WaterSound		NA		3		1
Alys Beach		NA		3		1

Q. For which of the following beach destinations have you seen an article written about or seen or heard a television segment about in the past 12 months? (READ AND RANDOMIZE LIST)

Impact of BSW Public Relations

<u>Measure</u>	<u>Beaches of South Walton PR</u>	
	<u>Touched</u>	<u>Not Touched</u>
	<u>%</u>	<u>%</u>
Aware of Beaches of South Walton	100	42
Aware of Sandestin	88	62
Aware of Seaside	73	42
Aware of Rosemary Beach	61	21
Aware of WaterColor	49	15
Aware of WaterSound	30	9
Aware of Alys Beach	21	7
Visited Beaches of South Walton this year	14	2
Overall destination rating	78	68
Place visitor feels comfortable	87	78
Clean well maintained beaches	86	78
Pleasant place to relax and unwind	90	77
Good place for a family vacation	87	76
Scenic beauty	84	76
Place that's easy to get to	82	76
Customer service	82	74
Very likely to visit in next year or so	21	5
Interested in destination description	87	68

Current Website Visitation

<u>Checklist</u> (Base)	PRIZM Marketing Group						
	<u>Total</u> (500)	<u>Market Type</u>		<u>Jet Skis and</u> <u>Snorkels</u> (149)	<u>All About</u> <u>the Kids</u> (122)	<u>Gulf Coast</u> <u>Sunsets</u> (124)	<u>Relax and</u> <u>Reconnects</u> (105)
		<u>Core</u> (390)	<u>Expansion</u> (110)				
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Gulf Shores/Orange Beach	14	17	←	3	11	17	11
Destin	13	15	←	5	19	8	10
Panama City Beach	10	11	←	4	10	8	10
Caribbean Islands	10	8		13	16	5	7
Hilton Head Island	7	7		5	9	6	8
Sandestin	7	8	←	3	9	4	8
Beaches of South Walton	5	6	←	-	5	3	4
Seaside	3	4		1	6	2	2
Rosemary Beach	2	2	←	-	3	-	-
Kiawah Island	2	2	←	-	3	-	4
WaterColor	1	2	←	-	2	-	3
Sea Island	1	1		-	1	-	2
WaterSound	*	1		-	1	-	-
Alys Beach	-	-		-	-	-	-

* Less than 0.5%.

Q. For which of the following beach destinations have you visited their website in the past 12 months? (READ AND RANDOMIZE LIST)

Website Visitation Trend

	(Base)	<u>2007</u> (511)	<u>2008</u> (500)	<u>2009</u> (500)	<u>2010</u> (500)
<u>Checklist</u>		<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Gulf Shores/Orange Beach		14	15	12	14
Destin		18	18	← 13	13
Panama City Beach		8	8	6	10
Caribbean Islands		23	22	← 14	10
Hilton Head Island		7	11	← 6	7
Sandestin		NA	NA	8	7
Beaches of South Walton		6	7	5	5
Seaside		NA	NA	4	3
Rosemary Beach		NA	NA	2	2
Kiawah Island		NA	NA	NA	2
WaterColor		NA	NA	3	1
Sea Island		NA	NA	NA	1
WaterSound		NA	NA	-	*
Alys Beach		NA	NA	1	-

Q. For which of the following beach destinations have you visited their website in the past 12 months? (READ AND RANDOMIZE LIST)

Impact of BSW Website

<u>Measure</u>	<u>Beaches of South Walton Website</u>	
	<u>Visited</u>	<u>Did Not Visit</u>
	<u>%</u>	<u>%</u>
Aware of Beaches of South Walton	100	46
Aware of Sandestin	86	64
Aware of Seaside	78	44
Aware of Rosemary Beach	81	23
Aware of WaterColor	68	16
Aware of WaterSound	48	10
Aware of Alys Beach	35	7
Visited Beaches of South Walton this year	30	2
Overall destination rating	88	69
Place visitor feels comfortable	90	78
Clean well maintained beaches	91	78
Pleasant place to relax and unwind	92	78
Good place for a family vacation	92	77
Place that's easy to get to	85	76
Value for the travel dollar	83	74
Quality dining	80	71
Customer service	86	74
Very likely to visit in next year or so	48	5
Very interested in destination description	42	18

Vacation Planning

Travel Party Size for Beach Destinations

	<u>Total</u> (500)	<u>Core</u> (390)	<u>Expansion</u> (110)
<u>Party Size</u>	<u>%</u>	<u>%</u>	<u>%</u>
2	30	26	47
3	12	12	10
4	28	29	27
5 or more	30	33 ←	16
<u>Average</u>	<u>4.3</u>	<u>4.5</u> ←	<u>3.5</u>

On the Beach vs. Off the Beach

	<u>Total</u> (500)	<u>Core</u> (390)	<u>Expansion</u> (110)
<u>Time Spent:</u>	<u>%</u>	<u>%</u>	<u>%</u>
On the beach	53	54	48
Off the beach	47	46	52

Q. Thinking about the times you've visited beach destinations, excluding sleeping and meals, what percentage of time did you spend on the beach versus doing things off the beach?

Magazines Used For Vacation Planning

		Market Type	
		<u>Total</u>	<u>Core</u> <u>Expansion</u>
	(500)	(390)	(110)
<u>Magazines</u>	<u>%</u>	<u>%</u>	<u>%</u>
<u>Net Any Magazine</u>	<u>45</u>	<u>47</u> ←	<u>38</u>
Travel + Leisure	18	19	18
Southern Living	14	17 ←	5
Conde Nast Traveler	9	9	9
Florida Travel + Life	4	4	6
AAA Magazine	4	2 →	10

Q. Which of the following magazines do you use for vacation ideas or planning?

Use of Internet in Travel Decisions

	<u>Total</u> (500) %	Market Type	
		<u>Core</u> (390) %	<u>Expansion</u> (110) %
<u>Use Internet to Plan Travel</u> ¹	<u>74</u>	<u>72</u>	<u>82</u>
<u>Specific Approaches</u> ²			
Search for <u>specific destinations</u> and see which websites come up	59	56	→ 70
Type in the individual <u>website address of specific destination</u>	36	37	32
Search with <u>words that describe the vacation you are looking for</u>	32	32	32
Search for <u>specific properties</u> and see which websites come up	30	30	28
Type in the individual <u>website address of specific properties</u>	28	28	27

First asked 2010

¹Q. Generally speaking, do you use the Internet to help you make your decisions of where to travel and where to stay?

²Q. Which of the following do you do when using the Internet to help you make travel decisions?

Websites Used For Vacation Planning

<u>Websites</u>	<u>Total</u> (500)	<u>Market Type</u>	
		<u>Core</u> (390)	<u>Expansion</u> (110)
	<u>%</u>	<u>%</u>	<u>%</u>
<u>Net Any Website</u>	<u>66</u>	<u>62</u>	<u>74</u>
Expedia	44	42	52
Yahoo Travel	18	17	23
Trip Advisor	16	17	14
Travelocity	5	4	6
Orbitz	3	3	4
Google	2	2	3
Kayak	2	2	2
Hotwire	1	-	3
Hotels.com	1	1	-

Q. Which of the following websites do you use for vacation ideas or planning?

Use of Social Media for Vacation Planning

	<u>Total</u> (500)	<u>Core</u> (390)	<u>Expansion</u> (110)
<u>Social Media</u>	<u>%</u>	<u>%</u>	<u>%</u>
<u>Net Any Social Media</u>	<u>21</u>	<u>24</u>	 <u>12</u>
Facebook	20	23	 11
YouTube	10	11	6
Twitter	3	4	3
Flickr	1	1	2

Q. What, if any, of these sites do you currently use for vacation ideas or planning? Any others?

App Eligible

	<u>Total</u> (500) <u>%</u>	<u>Core</u> (390) <u>%</u>	<u>Expansion</u> (110) <u>%</u>
<u>Have an iPhone and/or iPad</u>	<u>21</u>	<u>23</u> ←	<u>14</u>
Have an iPhone	18	20	13
Have an iPad	7	8	5

Q.: Which of the following do you have?

Favorite Television Programs Watched

<u>Unaided</u>	<u>%</u>
Dancing With The Stars	11
NCIS	11
Grey's Anatomy	10
Fox News	9
The Mentalist	6
Criminal Minds	5
CSI	5
The Good Wife	5
Glee	5
Survivor	4
Biggest Loser	4
Desperate Housewives	4
Two And A Half Men	3
Mad Men	3
House	3
The Office	3
Amazing Race	3
Castle	3
Modern Family	3

Future Visitation

Spring 2011 Travel

(500 BSW Target Prospects)

	<u>%</u>	<u>%</u>
<u>Will Travel Next Spring¹</u>	<u>54</u>	
<u>Will Decide on Destintion:²</u>		
Have already been made	11	20
Before end of this year	6	10
Early next year	14	26
A few months before the trip	14	26
A month before the trip	7	14
The month of the trip	2	3
The week of the trip	*	1
<u>Will Book Accomodations:³</u>		
Have already been made	6	11
Before end of this year	4	8
Early next year	15	27
A few months before the trip	13	24
A month before the trip	12	22
The month of the trip	3	5
The week of the trip	2	3

First quarter
communications
will have
strongest impact
for spring

Can still influence
eight out of ten
who will travel
this spring

Can still influence
nine out of ten
who will travel
this spring

(First asked 2010.)

¹ Q.: Will you likely take a vacation or leisure trip next spring, that is March, April, or May 2011, where you will stay at least one night in paid accommodations?

² Q.: When will you most likely decide where you will visit on that trip?

³ Q.: When will you most likely book your accommodations?

Summer 2011 Travel

(500 BSW Target Prospects)

	<u>%</u>	<u>%</u>
<u>Will Travel Next Summer¹</u>	<u>65</u>	
<u>Will Decide on Destintion:²</u>		
Have already been made	18	22
Before end of this year	3	4
Early next year	19	29
A few months before the trip	16	22
A month before the trip	11	10
The month of the trip	2	3
The week of the trip	*	2
<u>Will Book Accomodations:³</u>		
Have already been made	7	11
Before end of this year	2	4
Early next year	18	27
A few months before the trip	18	28
A month before the trip	16	25
The month of the trip	2	4
The week of the trip	*	2

Can still influence
eight out of ten
who will travel
this summer

Can still influence between
eight & nine out of ten
who will travel
this summer

First quarter and second
quarter communications
will have strongest
Impact for summer

(First asked Summer 2010.)

¹ Q.: Will you likely take a vacation or leisure trip next summer, that is June, July or August 2011, where you will stay at least one night in paid accommodations?

² Q.: When will you most likely decide where you will visit on that trip?

³ Q.: When will you most likely book your accommodations?

Next Year Intended Visitation

				PRIZM Marketing Group				
	(Base)	<u>Total</u> (500)	<u>Market Type</u>		<u>Jet Skis and</u> <u>Snorkels</u> (149)	<u>All About</u> <u>the Kids</u> (122)	<u>Gulf Coast</u> <u>Sunsets</u> (124)	<u>Relax and</u> <u>Reconnects</u> (105)
			<u>Core</u> (390)	<u>Expansion</u> (110)				
<u>Checklist</u>		<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Destin		39	45	← 18	41	34	39	43
Gulf Shores/Orange Beach		37	44	← 10	30	45	36	37
Panama City Beach		30	32		24	34	29	33
Caribbean Islands		28	27		31	17	26	38
Beaches of South Walton		22	26	← 7	25	16	22	26
Hilton Head Island		19	18		25	11	19	22
Kiawah Island		7	7		9	2	8	7
Sea Island		6	6		4	4	6	9

Q.10: How likely are you to visit each of the following in the next year or so?

Trend of Intended Visitation

	(Base)	<u>2007</u> (511) %		<u>2008</u> (500) %		<u>2009</u> (500) %		<u>2010</u> (500) %
<u>Checklist</u>		<u>%</u>		<u>%</u>		<u>%</u>		<u>%</u>
Destin		39	←	33	→	43		39
Gulf Shores/Orange Beach		34		32	→	41		37
Panama City Beach		22		23		26		30
Caribbean Islands		43	←	34		33	←	28
Beaches of South Walton		21	←	16	→	21		22
Hilton Head Island		31		27		25		19
Kiawah Island		NA		NA		NA		7
Sea Island		NA		NA		NA		6

Interest in Visiting Based on Description

		PRIZM Marketing Group						
		Market Type			Jet Skis and	All About	Gulf Coast	Relax and
	(Base)	Total	Core	Expansion	Snorkels	the Kids	Sunsets	Reconnects
		(500)	(390)	(110)	(149)	(122)	(124)	(105)
<u>Checklist</u>		<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
<u>Total Interested</u>		<u>71</u>	<u>73</u>	 <u>60</u>	<u>70</u>	<u>75</u>	<u>64</u>	<u>73</u>
Very Interested		19	19	19	22	23	18	13
Somewhat Interested		52	54	 41	48	52	46	60
<u>Total Not Interested</u>		<u>29</u>	<u>27</u>	 <u>40</u>	<u>30</u>	<u>25</u>	<u>36</u>	<u>27</u>
Not Very Interested		15	15	18	16	14	14	17
Not at All Interested		14	12	 22	14	11	22	10

Q. Located on Northwest Florida's Gulf Coast is an upscale, yet casual vacation destination comprised of 26 miles of sugar-white sand beaches and emerald green waters. Here you will find 15 distinct communities nestled between panoramic views and natural preserves. Not only will this seaside haven provide the rejuvenation you seek, but it is so extraordinary you will want to return year-after-year, feeling comfortable enough to call this place your own. How interested are you in visiting this place?

Trend in Interest Based on Description

<u>Checklist</u>	(Base)	<u>2008</u>		<u>2009</u>		<u>2010</u>
		(500)		(500)		(500)
		<u>%</u>		<u>%</u>		<u>%</u>
<u>Total Interest</u>		<u>54</u>	→	<u>62</u>	→	<u>71</u>
Very Interested		11	→	18		19
Somewhat Interested		43		44	→	52

First asked 2008.

Q. Located on Northwest Florida's Gulf Coast is an upscale, yet casual vacation destination comprised of 26 miles of sugar-white sand beaches and emerald green waters. Here you will find 15 distinct communities nestled between panoramic views and natural preserves. Not only will this seaside haven provide the rejuvenation you seek, but it is so extraordinary you will want to return year-after-year, feeling comfortable enough to call this place your own. How interested are you in visiting this place?

Preferred Mode of Transportation

Among Those Interested in Visiting

		PRIZM Marketing Group						
	(Base)	Market Type			Jet Skis and	All About	Gulf Coast	Relax and
		Total	Core	Expansion	Snorkels	the Kids	Sunsets	Reconnects
		(353)	(287)	(66)	(104)	(92)	(79)	(77)
		%	%	%	%	%	%	%
Drive		75	78	←	62	67	78	78
Fly		22	19	→	35	31	20	17
Don't know		3	3		3	2	5	5

Preferred Mode of Transportation Trend

	Total			Core Markets			Expansion Markets		
<u>Checklist</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>	<u>2008</u>	<u>2009</u>	<u>2010</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Drive	57	→ 69	→ 75	71	77	78	41	45 →	62
Fly	37	← 26	22	23	18	19	52	50 ←	35
Don't know	6	5	3	6	5	4	7	5	3

First asked 2008.

Q. Would you prefer to drive or fly to this place this place?

Impact of “Green”

	<u>Total</u> (500)	<u>Core</u> (390)	<u>Expansion</u> (110)
<u>If “Green”:</u>	<u>%</u>	<u>%</u>	<u>%</u>
Would be more likely to visit	23	22	25
Would not affect choice	77	78	75

Q. Would you be more likely to visit a beach destination if it offered "green" or environmentally friendly options or would it not really affect your choice?

Lingering Oil Spill Issues

Perceptions of Oil Impact Today

(500 BSW Target Prospects)

	<u>%</u>
<u>Yes, BSW Beaches are Impacted Today</u> ¹	<u>29</u>
<u>Ways they are impacted:</u> ²	
There are large patches of oil on the beach	13
Ocean water quality issues	8
Tar balls on the beach	5
Wildlife/Ecosystem issues	3
Air quality issues	2

¹ Q.: To the best of your knowledge, are the Beaches of South Walton beaches impacted by the oil from the Gulf Oil Spill today?

² Q.: In what ways are those beaches impacted?

Source of Information About Conditions

(145 BSW Target Prospects Who Believe There is Oil Impact Today)

<u>Unaided</u>	<u>%</u>
News reports on television	61
News articles	24
People who live there	12
People who have visited	10
Emails from properties	8
Websites of beach destinations	6
Have seen for myself	5
Facebook	2
News websites (Google, MSN)	2

Expect Impact Next Spring & Summer

(500 BSW Target Prospects)

	<u>%</u>
<u>Yes, BSW Beaches Will Be Impacted Next Spring/Summer¹</u>	<u>15</u>
<u>Ways they are impacted:²</u>	
There are large patches of oil on the beach	7
Tar balls on the beach	5
Wildlife and Marine life issues	5
Ocean water quality issues	4
Air quality issues	1

¹ Q.: Do you expect the Beaches of South Walton beaches will be impacted by the oil from the Gulf Oil Spill next spring or summer?

² Q.: In what ways do you expect the beaches to be impacted?

Countering Negative Perceptions

(500 BSW Target Prospects)

<u>Unaided</u>	<u>%</u>
<u>Expect BSW Beaches to be Impacted Next Spring/Summer¹</u>	<u>15</u>
<u>Information that would convince otherwise:²</u>	
Assurances from government/environmental agencies	14
News reports that say they are	5
Scientific data/testing	4
Seeing it for myself	3
Hearing it from people that live there	3
Online information	2
Hearing it from people who have visited	1

¹ Q.: Do you expect the Beaches of South Walton beaches will be impacted by the oil from the Gulf Oil Spill next spring or summer?

² Q.: What information would convince you that the beaches air and water are safe and open for enjoyment?

Most Credible Sources of Information

(500 BSW Target Prospects)

<u>Unaided</u>	<u>%</u>
Local television news	21
Family, friends or co-workers	16
Newspapers	14
Local news websites	12
National broadcast news (ABC, CBS, NBC)	12
Resort or property websites	12
Destination websites	11
Cable news (CNN, Fox News, MSNBC)	9
Internet in general	9
Walton County officials	8
Magazines	5
Social media (Facebook, Twitter, blogs)	4
People who live there	4
People who have visited there	3

Word Association

Word Association

<u>Unaided</u>	<u>Beaches of South Walton</u> <u>%</u>	<u>Northwest Florida's Gulf Coast</u> <u>%</u>	<u>Gulf Coast</u> <u>%</u>	<u>White Sand Beaches Of the Gulf Coast</u> <u>%</u>	<u>Santa Rosa Beach</u> <u>%</u>	<u>The Secret Beach</u> <u>%</u>
Nothing	42	26	13	14	69	67
White sand	12	9	8	12	5	1
Seaside	12	9	8	12	5	1
Beach	9	11	11	5	7	5
Ocean/water	5	4	6	2	2	1
Beautiful/scenic	4	6	4	9	3	1
Destin	4	5	3	13	*	*
Nice	3	2	-	1	2	*
Fun/enjoyable	3	1	2	2	*	1
Florida	3	1	4	3	2	*
Panama City	*	7	2	5	*	*
Oil spill	*	2	7	1	*	*
Dining/seafood	1	1	4	*	*	-
Gulf Shores/Orange Beach	1	1	9	6	*	*
Secluded/Privacy	-	-	-	-	-	6
Exotic/adult/nudity	-	-	-	-	-	1

Q. For each of the following, please tell me what immediately comes to your mind?

* Less than 0.5%.

Market by Market

Market by Market Summary

<u>Measure</u>	<u>Atlanta</u>	<u>Birmingham</u>	<u>Mobile</u>	<u>New Orleans</u>	<u>Nashville</u>	<u>Dallas</u>	<u>Tallahassee</u>	<u>Memphis</u>	<u>Houston</u>	<u>Jackson</u>
Feeder Rank	1	2	3	4	5	6	7	8	9	10
Target Households	977,831	178,106	127,955	125,593	265,792	920,670	51,026	150,406	742,422	63,789
Name Recognition	42%	80%	56%	70%	60%	48%	67%	44%	13%	60%
Intend to visit in 2011	16%	46%	33%	35%	34%	14%	11%	28%	7%	20%
Interested (by description)	72%	70%	89%	85%	66%	64%	100%	72%	50%	60%
Recall BSW Advertising	16%	44%	22%	30%	30%	24%	11%	12%	-	20%
Touched by BSW PR	10%	22%	22%	10%	18%	6%	11%	12%	-	-
Use magazines for vacation planning	44%	56%	33%	45%	46%	52%	44%	48%	47%	60%
Use Internet for vacation planning	76%	80%	67%	55%	72%	76%	78%	84%	80%	20%
Use social media for vacation planning	20%	28%	11%	5%	24%	26%	33%	12%	17%	40%
Likely to travel in spring 2011	58%	64%	67%	70%	42%	42%	44%	32%	57%	40%
Likely to travel in summer 2011	70%	80%	56%	65%	60%	60%	67%	52%	67%	80%
Believe BSW is impacted by oil today	38%	18%	22%	30%	22%	24%	44%	20%	10%	20%
Believe BSW will be impacted by oil in 2011	24%	8%	11%	10%	14%	18%	33%	12%	7%	-

Market by Market Summary

<u>Measure</u>	<u>Montgomery</u>	<u>Huntsville</u>	<u>Baton Rouge</u>	<u>St. Louis</u>	<u>Orlando</u>	<u>Baltimore + Washington DC</u>	<u>SWA 4 Markets</u>
Feeder Rank	11	12	13	14	21	25	
Target Households	44,628	84,750	89,946	405,028	357,009	1,898,085	3,263,308
Name Recognition	53%	52%	42%	45%	24%	10%	31%
Intend to visit in 2011	20%	40%	17%	20%	-	7%	15%
Interested (by description)	80%	84%	67%	80%	53%	63%	59%
Recall BSW Advertising	33%	36%	25%	5%	6%	-	12%
Touched by BSW PR	20%	28%	25%	5%	-	-	6%
Use magazines for vacation planning	67%	44%	67%	40%	47%	30%	42%
Use Internet for vacation planning	73%	76%	92%	85%	76%	87%	78%
Use social media for vacation planning	33%	16%	33%	5%	12%	13%	18%
Likely to travel in spring 2011	73%	56%	75%	45%	53%	60%	51%
Likely to travel in summer 2011	60%	64%	67%	45%	71%	60%	64%
Believe BSW is impacted by oil today	40%	36%	50%	35%	24%	43%	24%
Believe BSW will be impacted by oil in 2011	7%	20%	17%	10%	18%	27%	16%

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