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LIST OF ACRONYMS AND ABBREVIATIONS

BLS	U.S. Department of Labor, Bureau of Labor Statistics
BOEM	U.S Department of the Interior, Bureau of Ocean and Energy Management
CVB	Convention and Visitor's Bureau
DWH	*Deepwater Horizon*
EAPs	Emergency Advance Payments
GCCF	Gulf Coast Claims Facility
OCSLA	Outer Continental Shelf Lands Act
QCEW	Quarterly Census of Employment and Wages
TDC	Tourism Development Council
TT	Travel and Tourism
TTR	Travel, Tourism, and Recreation

1.0 INTRODUCTION

The *Deepwater Horizon* (DWH) oil spill (which began on April 20, 2010) in the Gulf of Mexico directly affected various coastal resources, such as beaches, fishing areas, wetlands, and wildlife, that support tourism activities. The DWH oil spill also impacted various people and businesses that depend on tourism, such as hotels, restaurants, retailers, and tour operators. These impacts on tourism were spread across a variety of geographic areas, and the extent of the impacts on people and businesses did not always correspond to the extent of the physical oil damage. Rather, the impacts of the spill on tourism activities in any particular area were determined by various factors, such as the structure of the area's economy, clean-up activities, compensation programs, and public perceptions.

To better understand the DWH oil spill's impacts on tourism in the Gulf region, the Eastern Research Group (ERG):

- Analyzed data from the Gulf Coast Claims Facility (GCCF) for DWH oil spill-related claims received between August 22, 2010 and March 1, 2012 (Section 2.0).
- Reviewed local-level information on travel, tourism, and recreation in the Gulf of Mexico region related to the DWH oil spill in newspaper articles and tourism bureau websites (Section 3.0).
- Analyzed quarterly employment, establishment, and payroll data for tourism-related sectors in the Gulf region (Section 4.0).
- Conducted a limited amount of field work in the Gulf region, including interviews with tourism officials, trade associations, and businesses (Section 5.0).

Each of these four components represents a distinct approach to assessing the impacts of the DWH oil spill on tourism; we discuss the methodology, data, and findings for each component in their separate sections within this report. We then provide a synthesis of the results of these various methodologies in Section 6.0. ERG also developed profiles for 64 Gulf region counties and parishes to show the scale of tourism within each and to identify the impacts of the spill on each county or parish. These county and parish profiles, which aggregate the results of the four methodologies discussed above, are presented in Appendix B.

Geographically, this study focuses on 64 counties and parishes in the Gulf region: the 54 coastal counties and parishes and 10 non-coastal counties and parishes. These counties and parishes were selected during the development of a related report (ERG, 2014). ERG (2014) documents the development of the data that are used in Section 4.0 of this report. In selecting these counties and parishes, BOEM considered a number of factors, including: 1) the scale of each county's or parish's tourism industry, 2) the extent to which it was impacted by the DWH oil spill, 3) its proximity to the coast, and 4) the scale of the OCS oil and gas industry in the county or parish. Appendix A provides maps of the in-scope counties and parishes by state. The data created as part of this project will be used by BOEM to assess the impacts of the DWH oil spill and to estimate the impacts of future activities and events on tourism.

2.0 ANALYSIS OF GULF COAST CLAIMS FACILITY DATA

After the DWH oil spill, BP entered into negotiations with the U.S. government, the company agreed to: 1) establish a $20 billion trust, funded over four years, that would be available to pay the claims of individuals and businesses under the Oil Pollution Act of 1990 (OPA), and the claims of local and state governments and claims of federal, state and tribal trustees for natural resource damages; and 2) create a new claims process to be administered by a neutral third party (BDO Consulting, 2012). As part of the response to these negotiated terms, BP created the Gulf Coast Claims Facility (GCCF), an organization aiming to resolve individual and business claims for costs and damages incurred as a result of the DWH oil spill. GCCF began operating in New Orleans in August 2010 and continued as the BP claims processing facility until it was replaced by the Court Supervised Settlement Program on June 4, 2012.[1]

The purpose of this analysis is to use the data on claims filed with the GCCF to identify travel and tourism sectors that were impacted by the DWH spill across the Gulf Coast and to identify the geographic locations of impacts based on claims.[2] In this section, we present data on the claims paid by sector at the state level, the amounts of claims for the 64 counties in the study area, and provide maps to identify the location of impacts (claims) in the Gulf.

Table 1 provides data from the GCCF claims paid between August 22, 2010 and March 1, 2012 by industry type.[3] "Tourism and Recreation," as defined by GCCF, appears eighth on the list and represented less than three percent of total paid claims. Some of the industries that appear higher on the list (e.g., food, beverage, and lodging), however, are included in BOEM's definition of tourisms developed in another report (ERG, 2014). Thus, it was necessary to reconcile the set of sectors included in the BOEM definition of tourism with the set used by GCCF in its definition of tourism.

This section begins by describing the GCCF data that we used in the analysis. We then discuss how the GCCF-defined tourism sector compares the BOEM definition developed in ERG's previous work (ERG, 2014) and how we used the GCCF data to develop a measure of tourism impacts consistent with the BOEM definition of tourism.

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[1] The Court Supervised Settlement Program was one result of the agreement-in-principle that BP reached with plaintiffs in the class action lawsuit, *In Re: Spill by the Oil Rig "Deepwater Horizon" in the Gulf of Mexico on April 20, 2010*. As part of the litigation, a "Transition Order" to create a process to transition from the GCCF process to the Court Supervised Settlement Program was issued on March 8, 2012. (BDO Consulting, 2012).

[2] The claims analysis for this project was conducted using the GCCF claims data before the claims process transition to the Court Supervised Settlement Program.

[3] The rationale for using paid claims is discussed in Section 2.1. The range of dates corresponds to the data that ERG obtained from GCCF for use in this analysis.

Table 1

Distribution of GCCF Claims Paid between August 22, 2010 and March 1, 2012 by Industry Type

GCCF Industry Type	Amount	Percent
Retail, Sales or Services	$1,883,336,596	31.11%
Food, Beverage and Lodging	$1,588,441,988	26.24%
Fishing	$742,772,569	12.27%
Rental Property(ies)	$662,902,992	10.95%
Multiple Industry / Business Types	$397,074,014	6.56%
Seafood Processing and Distribution	$352,761,346	5.83%
No Industry Designation	$280,420,215	4.63%
Tourism and Recreation	$146,661,731	2.42%
Total	$6,054,371,450	100%

2.1 DESCRIPTION OF GCCF CLAIMS DATA USED IN OUR ANALYSIS

We obtained from GCCF three Microsoft® Excel® data files that include data for claims received between August 22, 2010 and March 1, 2012.[4] The data includes a number of elements, including:

- Claim value
- Claim type (e.g., real and personal property damage, removal and clean-up costs, lost earnings and profits)
- State and county of loss
- Business/industry type (e.g. retail, sales, and service, tourism and recreation)
- Claimant type (i.e., individual or business)[5]
- Claimant state and county of residence

We restricted the data to include only claims that are associated with at least one *payment*.[6] The data included 1,056,866 claims, 399,676 (37.8 percent of the total) of which were associated with at least one payment. These 399,676 claims paid (for claims received between August 22, 2010 and March 1, 2012) are the data that form the basis of our analysis in this

[4] The end point of this time frame corresponds to when ERG conducted this analysis.

[5] Government claims (e.g., reimbursement of unemployment compensation) are addressed through a different process.

[6] The GCCF data contain many claims where no payment has been made; examples include claims that were still under review or that were denied.

report. These claims were associated with $6.05 billion in payouts to claimants between August 22, 2010 and March 1, 2012.

GCCF offered different options for payment to claimants:

- **Emergency Advance Payments (EAPs)** applications were able to be submitted from August 23, 2010 to November 23, 2010 and provided immediate relief without requiring the claimant to give up the right to sue BP or other parties. EAPs required less documentation and less rigorous review than other claims. Claimants were able to apply for EAPs covering losses of one month (EAP-1) up to six months (EAP-6).
- From November 23, 2010 to its termination on June 4, 2012, GCCF provided **Interim and Final Payments**. Interim Payments cover past losses; Final Payments cover past losses and future damages. To receive a Final Payment, a claimant had to waive his or her right to sue BP and other parties for all claims (except claims involving physical harm), but Interim Payments did not require this release.
- **Quick Payment Final Claim (Quick Pay)** payments were offered from December 2010 to the GCCF's termination on June 4, 2012. Any claimant who had previously received an EAP or Interim Payment could receive a Quick Pay ($5,000 for individuals; $25,000 for business claimants) without providing further documentation. As with a Final Payment, a claimant had to waive his or her right to sue in order to receive the Quick Pay.

Table 2 provides the counts of each claim payment type used in the analysis of GCCF data. GCCF claims were eligible for more than one payment type, and therefore, the total number of claims payments exceeds the number of total claims, as illustrated in the table below.

Table 2

Counts of Types of Claims Payments used in the GCCF Data Analysis

Claim Payment Type	Count of Claim Payment Types
Emergency Advance Payments-1	13,764
Emergency Advance Payments-6	155,811
Interim Payments	66,618
Final Payments	38,888
Quick Payment Final Claim	128,104
Total Claims [a]	*399,676*

[a] The total number of claim payments is 403,185, which exceeds the total number of claims because claims may have more than one payment type.

The GCCF data include a list of unique claimants with related claims, and each claimant is associated with one or more claims. In other words, a single claimant can make multiple claims for different costs or damages. **Table 3** summarizes the number of claims per person for the data used in this report. In the data used for this analysis, the majority of claimants were associated with one or two claims with payments. All claimants had between one and seven associated claims.

Table 3

Distribution of GCCF Claims Paid between August 22, 2010 and March 1, 2012 by Number of Claims per Person

Number of Claims	Count of Claimants with this Number of Claims
1	46,916
2	170,156
3	4,003
4	100
5	4
6	2
7	1
Total Claimants	221,182
Total Claims	***399,676***

The claims data also indicate if the claim was made by an individual or by a business. Table 4 shows the number of claims made by claimant type and the value of the claims paid by claimant type. The data show that more than twice as many claims were made by individuals than by businesses; however, as a percentage of the total claims value, close to 62 percent has been paid to businesses.

Table 4

Number and Value of Claims by Claimant Type

Claimant Type	Number of Claims		Value of Claims Paid	
	Count	Percent	Amount (Billions)	Percent
Business	116,076	29.0%	$3.74	61.7%
Individual	283,600	71.0%	$2.34	38.3%
Total	**399,676**	**100%**	**$6.05**	**100%**

2.2 Comparison of GCCF and BOEM Definitions of Tourism and Recreation

For the analysis of GCCF claims data, it was necessary to compare the definitions of tourism sectors used by BOEM to those in the GCCF data to determine which sectors to include in the impact assessment. The BOEM definition of travel, tourism, and recreation is described in more detail in ERG (2014). The GCCF data provide an "Industry Type" designation and a more granular "Business Type" for each claim. This section compares the business types that are included in the GCCF to the sectors included in BOEM's definition of the tourism and recreation industry.

The GCCF data associates 23 different business types with the Tourism and Recreation industry. To compare the GCCF definition of the tourism and recreation industry with the BOEM definition, ERG analyzed all Business Types in the GCCF data and re-categorized them into Tourism, Recreation, or both Tourism and Recreation, to better align with the BOEM definition.

Table 5 lists all business types that are included in the GCCF or BOEM definitions of the tourism and recreation industry and the related NAICS codes for each business type. Some businesses are included in both the GCCF and BOEM definitions of the tourism and recreation industry, but other businesses are captured only by the GCCF or BOEM definition. For the analysis of GCCF data, *only claims associated with businesses meeting the BOEM definition of the tourism and recreation industry were included.* To be included in this analysis, a GCCF Business Type must be part of the BOEM definition of tourism. Thus, our analysis includes a number of GCCF Business Types that are not part of the GCCF definition of "Travel and Tourism" and excludes a few GCCF Business Types that are defined by GCCF as "Travel and Tourism."

Table 5

Business Types in GCCF or BOEM Definition of Tourism and Recreation Industry and Related NAICS Codes

Business Type	Included in GCCF Definition [a]	Included in BOEM Definition [b]	Related NAICS
Airline	Yes	TT	481111; 481211; 481219
Aquarium	Yes	BOTH	712130
Arcade/Entertainment Center/Bowling	Yes	BOTH	713120; 713290; 713950; 713990
Bar		BOTH	722410
Beach Equipment Rental		TT	532292
Beach Equipment Vendor		RE	451110
Boat Dealer		RE	441222
Boat Equipment Supplier/Vendor		RE	441222
Boat Rental/Leasing		TT	532292; 532411
Boat Seller		RE	423860; 423910
Bus Line/Bus Company	Yes	TT	485113; 485210
Bus Tours	Yes	TT	487110
Campground and RV Park		BOTH	721211; 721214
Casino	Yes	BOTH	713210; 721120
Charter Fishing		BOTH	487210; 713990
Destination Wedding Service Provider	Yes	TT	812990
Diver in a Tourism Business	Yes	TT	611620
Event Planning/Event Rentals/Event Locations	Yes		531120; 711310; 711320

Business Type	Included in GCCF Definition [a]	Included in BOEM Definition [b]	Related NAICS
Fundraiser/Fundraising Event	Yes		561499
Golf and Miniature Golf Course	Yes	BOTH	713910; 713990
Hotel/Motel/Bed & Breakfast		TT	721110; 721191
Marina/Dock/Ice Houses		BOTH	488310; 713930
Museum	Yes	BOTH	712110; 712120
Musician/Musical Entertainer	Yes		711130; 711510
Other Entertainment Acts	Yes	BOTH	713990
Other Food Beverage and Lodging		BOTH	531110; 721199; 722410
Other Tourism or Recreation	Yes	BOTH	532292; 561510; 561520; 713940
Recreational Fishing Only		BOTH	713990; 721214
Resort		TT	721110; 721120
Restaurant/Bakery/Food Stand		BOTH	722110; 722211; 722213; 722330
Restaurants		BOTH	722110; 722211; 722212
Sight-seeing Tour or Pleasure Cruise Boat Operator	Yes	BOTH	487210; 487990; 561520
Snorkeling and Diving Tour Provider	Yes	BOTH	611620
Theme Park	Yes	BOTH	712130; 713110
Travel Agency	Yes		561510
Water Park	Yes	BOTH	713110
Water Sports Rental/Jet Ski/Parasailing	Yes	BOTH	532292
Wildlife or Bird Watching Guides or Tours	Yes	BOTH	712190; 713990
Yacht Club/Country Club	Yes	BOTH	713910; 713930; 713990

[a] Some claims categorized in the Tourism and Recreation industry did not indicate a Business Type (or were listed as "No Business Designation.)."

[b] See ERG (2014) for details. For the BOEM definition, GCCF business types were categorized as Tourism (TT), Recreation (RE), or both Tourism and Recreation (BOTH).

2.3 Results

This section presents the findings from the analysis of GCCF data. First, we present the industries with the highest claims values at the state level and then the values for business and individual claims made at the county level. The section concludes with maps of the geographical distribution of paid losses throughout the Gulf region.

2.3.1 State-Level Summary of Claims By industry

Organized alphabetically by state, **Table 6** through **Table 10** lists the top five tourism and recreation business types, by claim value, for individual and business claimants for each of the five in-scope study states. Though there are some variations between the states and between businesses and individuals, the tables show that, for all five states, the "Hotel/ Motel/ Bed and Breakfast" and the "Restaurant/ Bakery/ Food Stand" business types are in the top five for both types of claimants (individuals and businesses). A number of key points can be gleaned from the data in Table 6 through **Table 10**:

- Resorts, charter fishing, and Marinas/Docks/Ice Houses appear consistently, although not in all, in the top five for the five states.
- Florida and Louisiana had, by far, the largest amounts of paid claims:
    - Individuals in Florida were paid $340 million for losses and businesses in Florida were paid $164 million.
    - Individuals in Louisiana were paid $227 million for losses and businesses in Louisiana were paid $88 million.
- Texas had relatively small amounts of paid claims relative to the other four states.

Table 6

Alabama: Top Five BOEM Tourism and Recreation Business Types for Individual and Business Claimants by Dollar Value of Claims

Top BOEM Tourism & Recreation Business Types	Value
Individual Claimants	
Restaurant/Bakery/Food Stand	$71,541,541
Hotel/Motel/Bed & Breakfast	$9,328,811
Resort	$5,468,847
Marina/Dock/Ice Houses	$2,175,998
Charter Fishing	$2,122,431
Business Claimants	
Restaurant/Bakery/Food Stand	$56,453,814
Hotel/Motel/Bed & Breakfast	$14,708,136
Charter Fishing	$12,882,386
Resort	$4,488,527
Marina/Dock/Ice Houses	$4,436,789

Table 7

Florida: Top Five BOEM Tourism and Recreation Business Types for Individual and Business Claimants by Dollar Value of Claims

Top BOEM Tourism & Recreation Business Types	Value
Individual Claimants	
Restaurant/Bakery/Food Stand	$339,282,406
Hotel/Motel/Bed & Breakfast	$77,471,178
Resort	$65,854,537
Bar	$16,905,514
Charter Fishing	$7,281,458
Business Claimants	
Restaurant/Bakery/Food Stand	$164,111,187
Hotel/Motel/Bed & Breakfast	$88,906,404
Charter Fishing	$63,892,829
Resort	$44,088,000
Bar	$15,824,414

Table 8

Louisiana: Top Five BOEM Tourism and Recreation Business Types for Individual and Business Claimants by Dollar Value of Claims

Top BOEM Tourism & Recreation Business Types	Value
Individual Claimants	
Restaurant/Bakery/Food Stand	$226,817,229
Hotel/Motel/Bed & Breakfast	$90,045,336
Bar	$12,983,866
Marina/Dock/Ice Houses	$3,113,975
Resort	$3,062,059
Business Claimants	
Restaurant/Bakery/Food Stand	$88,452,353
Hotel/Motel/Bed & Breakfast	$33,441,501
Charter Fishing	$22,128,336
Bar	$10,783,045
Marina/Dock/Ice Houses	$6,278,877

Table 9

Mississippi: Top Five BOEM Tourism and Recreation Business Types for Individual and Business Claimants by Dollar Value of Claims

Top BOEM Tourism & Recreation Business Types	Value
Individual Claimants	
Restaurant/Bakery/Food Stand	$42,149,405
Casino	$10,471,698
Hotel/Motel/Bed & Breakfast	$6,863,091
Resort	$2,941,647
Bar	$1,950,439
Business Claimants	
Restaurant/Bakery/Food Stand	$24,988,271
Hotel/Motel/Bed & Breakfast	$9,009,077
Casino	$7,938,402
Charter Fishing	$5,477,589
Bar	$2,413,316

Table 10

Texas: Top Five BOEM Tourism and Recreation Business Types for Individual and Business Claimants by Dollar Value of Claims

Top BOEM Tourism & Recreation Business Types	Value
Individual Claimants	
Hotel/Motel/Bed & Breakfast	$6,921,517
Charter Fishing	$2,058,605
Boat Dealer	$1,357,832
Restaurant/Bakery/Food Stand	$1,114,581
Boat Seller	$294,055
Business Claimants	
Boat Dealer	$473,599
Restaurant/Bakery/Food Stand	$124,921
Charter Fishing	$71,600
Hotel/Motel/Bed & Breakfast	$27,022
Diver in a Tourism Business	$20,000

2.3.2 SUMMARY OF CLAIMS ACROSS THE 64 IN-SCOPE COUNTIES

Table 11 summarizes the values paid for individual, business, and total claims by state and for the 64 counties and parishes in the study area (see Appendix A). Additional claims information (number of claims and most heavily impacted industries) is included in the county profiles in Appendix B.

Table 11

Value of Tourism and Recreation Claims for In-Scope Counties by Claimant Type

State	County or Parish	Coastal/ Non-Costal	Value of Tourism & Recreation Claims		
			Individual	Business	Total
AL	Baldwin	C	$68,907,584	$96,914,078	$165,821,662
	Mobile	C	$30,748,610	$28,819,119	$59,567,729
FL	Bay	C	$94,184,136	$78,930,719	$173,114,854
	Charlotte	C	$3,609,732	$3,692,505	$7,302,237
	Citrus	C	$157,670	$2,088,748	$2,246,417
	Collier	C	$48,362,359	$26,663,640	$75,025,998
	Dixie	C	-	$105,450	$105,450
	Escambia	C	$52,264,733	$39,438,779	$91,703,512
	Franklin	C	$3,796,379	$6,211,226	$10,007,605
	Gulf	C	$2,026,193	$3,662,390	$5,688,583
	Hernando	C	$294,844	$973,744	$1,268,588
	Hillsborough	C	$35,418,811	$7,553,457	$42,972,268
	Jefferson	C	-	$83,500	$83,500
	Lee	C	$25,556,237	$18,233,640	$43,789,877
	Levy	C	$37,900	$501,689	$539,589
	Manatee	C	$7,124,485	$5,176,332	$12,300,817
	Monroe	C	$30,347,503	$56,332,888	$86,680,391
	Okaloosa	C	$89,787,583	$98,317,186	$188,104,770
	Pasco	C	$3,035,652	$3,064,715	$6,100,366
	Pinellas	C	$63,439,700	$40,595,935	$104,035,635
	Santa Rosa	C	$24,446,964	$33,999,979	$58,446,943
	Sarasota	C	$11,931,141	$7,872,694	$19,803,835
	Taylor	C	$12,600	$1,387,116	$1,399,716
	Wakulla	C	$948,510	$2,884,950	$3,833,460
	Walton	C	$43,038,281	$41,157,570	$84,195,851
	Washington	NC	$221,527	$344,999	$566,526
LA	Calcasieu	NC	$209,127	$3,128,336	$3,337,463
	Cameron	C	-	$501,841	$501,841
	Iberia	C	$396,218	$2,428,113	$2,824,331
	Jefferson	C	$89,475,935	$42,265,252	$131,741,187
	Lafourche	C	$2,404,127	$11,261,005	$13,665,132
	Lafayette	NC	$376,628	$3,679,897	$4,056,525
	Orleans	C	$223,000,657	$45,627,785	$268,628,442
	Plaquemines	C	$2,362,732	$9,639,276	$12,002,008
	St. Bernard	C	$3,390,470	$5,546,497	$8,936,967
	St. Charles	NC	$2,764,508	$3,858,108	$6,622,616
	St. John the Baptist	NC	$3,345,190	$4,127,976	$7,473,165

State	County or Parish	Coastal/ Non-Costal	Value of Tourism & Recreation Claims		
			Individual	Business	Total
	St. Mary	C	$1,195,086	$2,268,334	$3,463,419
	St. Tammany	C	$15,580,449	$20,121,373	$35,701,822
	Tangipahoa	NC	$309,709	$1,990,976	$2,300,685
	Terrebonne	C	$4,850,080	$11,397,142	$16,247,223
	Vermilion	C	$96,285	$2,468,954	$2,565,238
MS	Hancock	C	$4,488,132	$6,360,730	$10,848,862
	Harrison	C	$50,559,987	$37,523,048	$88,083,035
	Jackson	C	$10,143,870	$15,244,705	$25,388,575
TX	Aransas	C	-	$167,840	$167,840
	Brazoria	C	$77,206	$564,326	$641,531
	Calhoun	C	-	$16,156	$16,156
	Cameron	C	$5,000	$440,053	$445,053
	Chambers	C	-	-	-
	Galveston	C	$120,913	$2,338,412	$2,459,325
	Harris	C	$391,284	$3,048,132	$3,439,416
	Jefferson	C	$8,000	$2,516,577	$2,524,577
	Jim Wells	NC	-	-	-
	Kenedy	C	-	-	-
	Kleberg	C	-	$29,799	$29,799
	Liberty	NC	$5,000	$100,000	$105,000
	Matagorda	C	$8,100	$234,208	$242,308
	Nueces	C	$12,189	$1,703,444	$1,715,633
	Orange	NC	-	$314,828	$314,828
	Refugio	C	-	-	-
	San Patricio	C	$42,000	$589,163	$631,163
	Victoria	NC	-	-	-
	Willacy	C	-	-	-
Totals					
Alabama			*$99,656,194*	*$125,733,197*	*$225,389,391*
Coastal			$99,656,194	$125,733,197	$225,389,391
Non-Coastal			-	-	-
Florida			*$540,042,940*	*$479,273,850*	*$1,019,316,791*
Coastal			$539,821,413	$478,928,851	$1,018,750,264
Non-Coastal			$221,527	$344,999	$566,526
Louisiana			*$349,757,200*	*$170,310,863*	*$520,068,064*
Coastal			$342,752,039	$153,525,571	$496,277,610
Non-Coastal			$7,005,161	$16,785,292	$23,790,454
Mississippi			*$65,191,990*	*$59,128,483*	*$124,320,472*
Coastal			$65,191,990	$59,128,483	$124,320,472
Non-Coastal			-	-	-
Texas			*$669,692*	*$12,062,939*	*$12,732,631*
Coastal			$664,692	$11,648,111	$12,312,803
Non-Coastal			$5,000	$414,828	$419,828
Total All Counties			**$1,055,318,016**	**$846,509,332**	**$1,901,827,348**
Coastal			**$1,048,086,328**	**$828,964,213**	**$1,877,050,541**
Non-Coastal			**$7,231,688**	**$17,545,119**	**$24,776,808**

2.3.3 Geographic Distribution of Claims

This section presents maps that show the geographic distribution of the GCCF claims data across the Gulf region. Each claim indicates:

- The county or parish where the loss physically occurred ("claim loss in county"), and
- The county or parish where the claimant resides ("resident of county").

These two pieces of claims information provide information about where the direct impacts of the oil spill occurred and who was impacted. The "claim loss in county" information indicates where physical losses resulting from the oil spill occurred, and the "resident of county" indicates who was impacted by providing information that can be used to show the geographical distribution of claimants. The county or parish where the loss physically occurred and the county or parish where the claimant resides can be the same county or parish, meaning the claimant resides in the same county as the loss occurred ("resident and loss in county"), or they can differ, indicating the claimant resides in one but the loss occurred in another.

In

The results of the analysis to estimate the change in tourism employment are presented in **Table 13** through **Table 17**. Each table includes county- and parish-level quarterly tourism employment data and the percentage change in tourism employment between same quarters from 2009q2-2011q4 (as described in Section 4.1.2 above). Additional quarterly tourism parameters (payroll and establishments) are presented in the county and parish profiles included in Appendix B.

Alabama (Table 13)

A comparison of tourism employment in Alabama counties before and after the spill does not show a large shift in tourism employment; employment numbers either hold steady or slightly increase up to three percent. A comparison of Baldwin County quarters in 2009 to 2011 showed employment increases ranging from nine percent to 14 percent; Mobile County ranged from a two percent decrease in tourism employment in q2 to an increase of two percent in q4.

Florida (Table 14)

Florida counties saw a fairly wide range of impacts to tourism employment in the quarters surrounding the spill (from -93% to +120%); however, the large percentage losses are associated with counties with a small the tourism sector. When focusing on the counties with tourism sectors of at least 1,000 employees (in 2009q2), we see changes in employment ranging from a 3.9 percent loss (Bay) to a 7.3 percent gain (Escambia) between 2009q2 and 2010q2. For the most part, counties with more than 1,000 employees in 2009q2 saw either increasing tourism employment over the time period or rebounds in tourism employment after an initial decline. Two exceptions to this were Sarasota and Hernando counties, where tourism employment remained at levels lower than pre-spill levels into 2011.

Louisiana (Table 15)

Louisiana parishes with more than 1,000 tourism employees in 2009q2 saw either no change or slight increases between 2009q2 and 2010q2 (quarter of the spill). However, in quarters after the spill, Calcasieu, Lafayette, and Terrebonne parishes saw tourism employment declines relative to pre-spill level. On the other hand, St. Tammany, Orleans, and Jefferson parishes saw increasing tourism employment after the spill.

Mississippi (Table 16)

Of the three Mississippi study counties, Hancock County appears to have had the largest negative percentage change in employment in the quarters after the spill. Jackson County maintained no or positive employment change after the spill; Harrison County had two quarters after the spill during which there were negative percentage changes in employment (spanning -2% to 1%). In contrast, Hancock County saw negative percentage changes in tourism employment of 7.7 percent after the spill.

Texas (Table 17)

Harris County, containing Houston, is by far the largest tourism employer among Texas counties. It saw increases in tourism employment following the spill. Cameron County also saw increasing tourism employment over the time period, compared to pre-spill levels. Victoria and Galveston counties saw initial declines in tourism employment followed by rebounding levels in 2011. As discussed in Section 5.4.2, during our field work we learned that some Texas counties actively marketed themselves as alternatives to Louisiana and Florida. In contrast to the increases seen in most of Texas, Jefferson County saw a continuous decline in tourism employment over the study period.

Discussion

For the most part, counties with more than 1,000 tourism employees in 2009q2 experienced either only initial (temporary) declines in tourism-related employment or no initial declines in employment followed by growth. Figure 5 shows this for the counties with the largest tourism employment in each state. It also shows the percentage change from the same quarter in the year before the spill (i.e., the "percentage change between same quarters, one-year and two-year impacts" from Tables 13 to 17). Harrison (Mississippi) and Hillsborough (Florida) both saw an initial decline followed by growth in tourism-related employment following the spill. In contrast, Harris County (Texas) and Orleans Parish (Louisiana) both saw initial and subsequent growth in tourism-related employment following the spill. Mobile County (Alabama) saw no change in tourism-related employment following the spill.

However, two counties with more than 1,000 tourism employees in 2009q2 did see declining tourism-related employment following the spill:

- *Hancock County (Mississippi)* saw a 7.7 percent decline in tourism employment in the second and third quarters of 2010 compared to the same quarters in 2009. The impacts beyond third quarter 2010 could not be reliably estimated due to data disclosure issues among hotels and restaurants over the time period (see note to **Table 16**). For the second and third quarters in 2010, the losses in Hancock County were among hotels (NAICS 721), restaurants (NAICS 722), and arts, entertainment, and recreation establishments (NAICS 71).

- *Sarasota County (Florida)* saw declines in tourism-related employment for the three quarters after the spill and then again in second quarter of 2011. These employment losses were concentrated among arts, entertainment, and recreation establishments (NAICS 71) and hotels (NAICS 721).

Table 13

Levels of and Same Quarter Changes in Travel and Tourism (TT) Employment in Alabama and its Counties Following the Deepwater Horizon Oil Spill, Second Quarter 2009 to Fourth Quarter 2011

Alabama Counties	Levels of Employment (thousands of employees)											Percentage Change Between Same Quarters						
												One-Year Impacts				Two-Year Impacts		
	2009			2010				2011										
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2010:2 to 2009:2	2010:3 to 2009:3	2010:4 to 2009:4	2011:1 to 2010:1	2011:2 to 2009:2	2011:3 to 2009:3	2011:4 to 2009:4
Baldwin	3.7	3.7	3.3	3.2	3.9	3.8	3.4	3.5	4.2	4.2	3.6	5.4	2.7	3.0	9.4	13.5	13.5	9.1
Mobile	5.6	5.5	5.3	5.3	5.6	5.5	5.3	5.3	5.5	5.5	5.4	0.0	0.0	0.0	0.0	-1.8	0.0	1.9

Note: Columns that are boxed in represent the quarter in which the DWH spill occurred (second quarter 2010).

Table 14

Levels of and Same Quarter Changes in Travel and Tourism (TT) Employment in Florida and its Counties Following the Deepwater Horizon Oil Spill, Second Quarter 2009 to Fourth Quarter 2011

Florida Counties	Levels of Employment (thousands of employees)											Percentage Change Between Same Quarters						
													One-Year Impacts			Two-Year Impacts		
	2009			2010				2011				2010:2 to 2009:2	2010:3 to 2009:3	2010:4 to 2009:4	2011:1 to 2010:1	2011:2 to 2009:2	2011:3 to 2009:3	2011:4 to 2009:4
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4							
Bay	5.1	4.9	4.0	4.2	4.9	4.8	4.2	4.6	5.5	5.5	4.5	-3.9	-2.0	5.0	9.5	7.8	12.2	12.5
Charlotte	1.7	1.6	1.7	1.8	1.8	1.6	1.6	1.8	1.8	1.6	1.7	5.9	0.0	-5.9	0.0	5.9	0.0	0.0
Citrus	1.1	1.1	1.0	1.1	1.1	1.1	1.1	1.0	1.1	1.0	1.0	0.0	0.0	10.0	-9.1	0.0	-9.1	0.0
Collier	8.7	7.4	8.2	8.9	8.6	7.8	8.5	9.3	8.8	8.2	9.0	-1.1	5.4	3.7	4.5	1.1	10.8	9.8
Dixie	0.08	0.08	0.07	0.05	0.04	0.01	0.01	0.02	0.01	0.02	0.01	-46.2	-88.0	-86.3	-67.4	-92.3	-80.0	-93.2
Escambia	4.1	4.2	4.0	4.2	4.4	4.4	4.1	4.2	4.8	4.8	4.5	7.3	4.8	2.5	7.3	0.0	17.1	14.3
Franklin	0.3	0.3	0.2	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	-3.7	7.7	8.7	4.0	7.4	7.7	8.7
Gulf	0.2	0.2	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	-54.4	-61.1	-51.4	-9.7	-60.0	-63.3	-62.1
Hernando	1.4	1.3	1.3	1.3	1.4	1.3	1.4	1.3	1.3	1.2	1.3	-2.9	0.8	3.8	-3.0	-7.1	-6.9	-3.8
Hillsborough	19.6	19.0	19.1	18.8	19.4	19.2	19.0	20.1	20.5	20.2	20.3	-1.0	1.1	-0.5	6.9	4.6	6.3	6.3
Jefferson	0.04	0.04	0.04	0.04	0.04	0.01	0.01	0.04	0.09	0.08	0.01	8.1	-65.7	-63.9	11.1	129.7	120.0	-69.4
Lee	10.9	10.0	5.3	10.1	10.5	10.3	9.5	10.9	10.9	10.1	10.3	-3.7	3.0	79.2	7.9	0.0	1.0	94.3
Levy	0.3	0.2	0.2	0.3	0.3	0.2	0.2	0.3	0.3	0.2	0.3	-8.9	-0.8	-5.3	1.2	-8.2	0.8	8.9
Manatee	3.7	3.3	3.5	3.8	3.8	3.6	3.6	3.8	3.8	3.7	3.9	2.7	9.1	2.9	0.0	2.7	12.1	11.4
Monroe	6.3	5.9	6.1	6.6	6.8	6.4	6.6	7.1	7.1	6.8	7.0	7.9	8.5	8.2	7.6	12.7	15.3	14.8
Okaloosa	3.6	3.6	3.0	3.3	3.9	3.7	3.0	3.1	4.0	3.8	3.3	8.3	2.8	0.0	-6.1	11.1	5.6	10.0
Pasco	3.6	3.4	3.3	3.5	3.6	3.4	3.5	3.7	3.6	3.5	3.6	0.0	0.0	6.1	5.7	0.0	2.9	9.1
Pinellas	17.2	16.1	15.8	16.1	16.9	16.3	16.0	16.4	17.0	16.8	16.5	-1.7	1.2	1.3	1.9	-1.2	4.3	4.4
Santa Rosa	1.2	1.2	1.1	1.1	1.2	1.2	1.2	1.2	1.4	1.4	1.3	0.0	0.0	9.1	9.1	16.7	16.7	18.2
Sarasota	6.7	6.3	6.5	6.6	6.5	6.1	6.2	6.7	6.5	6.3	6.5	-3.0	-3.2	-4.6	1.5	-3.0	0.0	0.0
Taylor	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	22.8	18.7	16.7	-2.5	17.2	16.5	18.4
Wakulla	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.02	0.03	0.03	0.03	-6.3	0.0	0.0	-17.9	6.3	10.0	0.0
Walton	2.3	2.3	1.8	1.9	2.3	2.2	1.8	2.0	2.6	2.6	2.1	0.0	-4.3	0.0	5.3	13.0	13.0	16.7
Washington	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	3.8	-9.6	-5.1	3.8	-6.5	9.0	0.0

Note: Columns that are boxed in represent the quarter in which the DWH spill occurred (second quarter 2010).

Table 15

Levels of and Same Quarter Changes in Travel and Tourism (TT) Employment in Louisiana and its Parishes Following the Deepwater Horizon Oil Spill, Second Quarter 2009 to Fourth Quarter 2011

Louisiana Parishes	Levels of Employment (thousands of employees)											Percentage Change Between Same Quarters						
												One-Year Impacts				Two-Year Impacts		
	2009			2010				2011				2010:2 to 2009:2	2010:3 to 2009:3	2010:4 to 2009:4	2011:1 to 2010:1	2011:2 to 2009:2	2011:3 to 2009:3	2011:4 to 2009:4
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4							
Calcasieu	5.9	6.0	5.9	5.8	5.9	5.8	5.7	5.6	5.7	5.8	5.6	0.0	-3.3	-3.4	-3.4	-3.4	-3.3	-5.1
Cameron	0.08	0.08	[a]	0.08	0.08	0.08	0.08	0.07	0.05	0.05	0.05	-4.8	-6.0	[a]	-12.3	-34.9	-34.9	[a]
Iberia	0.6	0.6	0.6	0.5	0.5	0.5	0.5	0.5	0.5	0.6	0.5	-4.6	-5.1	-6.4	-4.6	-2.5	-5.4	0.9
Jefferson	7.0	7.0	7.0	6.9	7.3	7.2	7.1	7.1	7.1	7.3	6.7	4.3	2.9	1.4	2.9	2.0	4.3	-4.3
Lafayette	4.2	4.1	4.0	4.0	4.2	4.1	4.0	3.9	4.0	4.1	4.0	0.0	0.0	0.0	-2.5	-4.8	0.0	0.0
Lafourche	0.8	0.8	0.8	0.8	0.8	0.9	0.8	0.8	0.8	0.9	0.9	0.2	2.0	3.8	0.2	2.1	1.9	4.1
Orleans	15.9	15.4	16.0	16.1	16.3	16.3	16.8	17.1	17.0	17.2	17.7	2.5	5.8	5.0	6.2	6.9	11.7	10.6
Plaquemines	0.3	0.3	0.3	0.3	0.4	0.4	0.4	0.4	0.4	0.4	0.4	23.1	27.5	28.0	33.6	25.6	26.3	25.7
St. Bernard	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	11.7	13.6	30.2	4.5	20.0	16.9	39.6
St. Charles	0.3	0.3	0.3	0.3	0.3	0.4	0.3	0.3	0.4	0.4	0.4	14.4	5.6	7.1	11.6	19.4	13.0	11.6
St. John the Baptist	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	-1.3	-4.5	3.7	2.5	-1.1	-5.6	2.4
St. Mary	0.9	0.7	0.7	0.7	0.7	0.8	0.8	0.8	0.8	0.8	0.8	-15.8	5.4	5.5	9.9	-7.3	7.8	9.1
St. Tammany	2.6	2.7	2.5	2.5	2.7	2.7	2.6	2.6	2.9	2.9	2.7	3.8	0.0	4.0	4.0	11.5	7.4	8.0
Tangipahoa	1.2	1.3	1.2	1.2	1.2	1.3	1.2	1.2	1.3	1.3	1.3	0.0	0.0	0.0	0.0	8.3	0.0	8.3
Terrebonne	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.3	1.3	1.4	1.3	0.0	0.0	0.0	-7.1	-7.1	0.0	-7.1
Vermilion	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	-9.3	-7.1	1.4	-2.2	-8.0	-5.8	-0.3

Note: Columns that are boxed in represent the quarter in which the DWH spill occurred (second quarter 2010).
[a] Not reported due to data disclosure issues.

Table 16

Levels of and Same Quarter Changes in Travel and Tourism (TT) Employment in Mississippi and its Counties Following the Deepwater Horizon Oil Spill, Second Quarter 2009 to Fourth Quarter 2011

Mississippi Counties	Levels of Employment (thousands of employees)											Percentage Change Between Same Quarters						
												One-Year Impacts				Two-Year Impacts		
	2009			2010				2011				2010:2 to 2009:2	2010:3 to 2009:3	2010:4 to 2009:4	2011:1 to 2010:1	2011:2 to 2009:2	2011:3 to 2009:3	2011:4 to 2009:4
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4							
Hancock	1.3	1.3	0.3 [a]	1.2	1.2	1.2	0.3 [a]	0.3 [a]	0.3 [a]	0.3 [a]	0.3 [a]	-7.7	-7.7	[a]	[a]	[a]	[a]	[a]
Harrison	11.8	11.7	11.3	11.1	11.6	11.7	11.2	11.2	11.8	11.9	11.5	-1.7	0.0	-0.9	0.9	0.0	1.7	1.8
Jackson	1.4	1.4	1.3	1.4	1.5	1.4	1.4	1.4	1.5	1.5	1.4	7.1	0.0	7.7	0.0	7.1	7.1	7.7

Note: Columns that are boxed in represent the quarter in which the DWH spill occurred (second quarter 2010).

[a] These values for employment and the associated percentage changes are associated with a data disclosure issue. The number of employees in the hotels sector (NAICS 721) and the restaurants sectors (NAICS 722) were non-disclosed for 2009q4, 2010q4, and all of 2011.

Table 17

Levels of and Same Quarter Changes in Travel and Tourism (TT) Employment in Texas and its Counties Following the Deepwater Horizon Oil Spill, Second Quarter 2009 to Fourth Quarter 2011

Texas Counties	Levels of Employment (thousands of employees)											Percentage Change Between Same Quarters						
												One-Year Impacts				Two-Year Impacts		
	2009			2010				2011										
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2010:2 to 2009:2	2010:3 to 2009:3	2010:4 to 2009:4	2011:1 to 2010:1	2011:2 to 2009:2	2011:3 to 2009:3	2011:4 to 2009:4
Aransas	0.5	0.5	0.4	0.4	0.5	0.5	0.5	0.4	0.4	0.5	0.4	4.6	5.4	9.6	-11.8	-2.6	1.3	-3.4
Brazoria	2.2	2.2	2.2	2.1	2.2	2.2	2.2	2.2	2.3	2.3	2.3	0.0	0.0	0.0	4.8	4.5	4.5	4.5
Calhoun	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	-1.5	5.8	6.8	15.8	19.9	18.4	22.9
Cameron	4.0	4.0	3.7	3.9	4.1	4.2	3.8	3.9	4.3	4.3	4.0	2.5	5.0	2.7	0.0	7.5	7.5	8.1
Chambers	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	7.0	-12.7	-5.0	3.8	5.0	-7.7	-3.3
Galveston	4.8	5.0	4.6	4.4	4.9	4.9	4.5	4.5	5.1	5.1	4.7	2.1	-2.0	-2.2	2.3	6.3	2.0	2.2
Harris	59.7	58.6	57.2	56.2	61.2	61.1	57.8	59.0	61.1	60.9	60.6	2.5	4.3	1.0	5.0	2.3	3.9	5.9
Jefferson	3.1	3.1	3.1	3.0	3.0	2.9	3.0	2.9	3.0	2.9	2.9	-3.2	-6.5	-3.2	-3.3	-3.2	-6.5	-6.5
Jim Wells	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	-3.1	3.7	7.3	-3.1	11.4	7.5	11.8
Kenedy	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Kleberg	0.34	0.34	0.34	0.33	0.33	0.32	0.33	0.37	0.38	0.39	0.41	-1.8	-6.7	-0.6	10.5	13.0	13.1	21.1
Liberty	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	-10.7	-8.5	-1.3	8.6	-2.7	0.9	5.5
Matagorda	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	-0.9	1.0	-6.3	-7.9	-8.0	-4.3	-8.6
Nueces	5.8	5.8	5.3	5.2	5.8	5.8	5.4	5.3	5.7	5.7	5.6	0.0	0.0	1.9	1.9	-1.7	-1.7	5.7
Orange	0.7	0.7	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	-3.9	-2.6	-1.8	-2.3	-7.2	-7.0	-6.9
Refugio	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	-1.8	-3.6	-1.9	0.0	-3.6	-5.5	1.9
San Patricio	0.7	0.7	0.6	0.6	0.6	0.6	0.6	0.6	0.7	0.6	0.6	-6.6	-6.0	-2.5	2.0	2.8	-2.7	2.0
Victoria	1.0	1.0	0.9	0.9	1.0	0.9	0.9	0.9	1.0	1.0	0.9	-2.0	-2.6	-1.5	1.1	0.2	1.7	3.4
Willacy	0.10	0.10	0.10	0.09	0.09	0.09	0.05	0.10	0.06	0.10	0.05	-6.9	-8.3	-46.3	3.2	-45.5	1.0	-43.2

Note: Columns that are boxed in represent the quarter in which the DWH spill occurred (second quarter 2010).

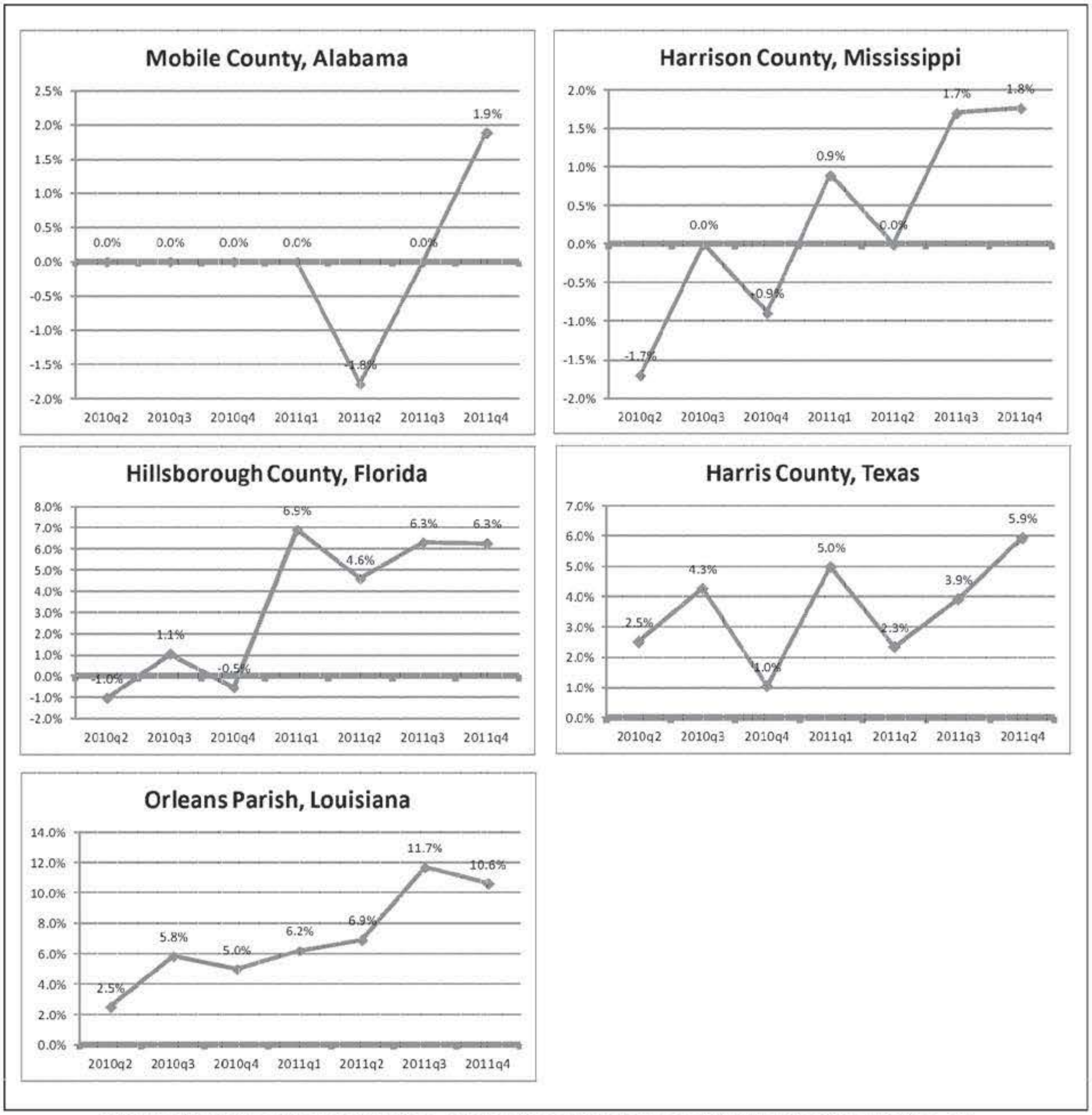


Figure 5: Percentage Changes in Tourism Employment for Largest Counties or Parishes in Each State, Second Quarter 2009 to Fourth Quarter 2011

Perspectives on the Impacts of the *Deepwater Horizon* Oil Spill on Gulf Tourism from Field Work in the Gulf, counties and parishes where a physical loss occurred are represented by blue. The degree of shading corresponds to the physical loss claims values (in dollars) in each county or parish; higher claims values are represented by the darker blue. The largest physical loss claims values occurred from eastern Louisiana to the panhandle of Florida and along the west coast of Florida. Figure 1 also includes a line depicting the extent to which oil reached the shore.[7] Louisiana, Mississippi, Alabama, and the Florida panhandle are covered by that line, but the western coast of Florida is not. The significant impacts claimed on the western coast of Florida were in the absence of oil reaching the shore. Furthermore, a number of inland Florida counties experienced costly impacts. On the other hand, few Texas counties experienced physical losses. Data indicates that a number of counties well inland from the shore experienced large impacts.

In Figure 2 green depicts counties and parishes where claimants reside. The degree of shading corresponds to the dollar amount of claims paid to claimants that reside in the county or parish; higher values being represented by the darker green. Comparing Figure 2 and

The results of the analysis to estimate the change in tourism employment are presented in **Table 13** through **Table 17**. Each table includes county- and parish-level quarterly tourism employment data and the percentage change in tourism employment between same quarters from 2009q2-2011q4 (as described in Section 4.1.2 above). Additional quarterly tourism parameters (payroll and establishments) are presented in the county and parish profiles included in Appendix B.

Alabama (Table 13)

A comparison of tourism employment in Alabama counties before and after the spill does not show a large shift in tourism employment; employment numbers either hold steady or slightly increase up to three percent. A comparison of Baldwin County quarters in 2009 to 2011 showed employment increases ranging from nine percent to 14 percent; Mobile County ranged from a two percent decrease in tourism employment in q2 to an increase of two percent in q4.

Florida (Table 14)

Florida counties saw a fairly wide range of impacts to tourism employment in the quarters surrounding the spill (from -93% to +120%); however, the large percentage losses are associated with counties with a small the tourism sector. When focusing on the counties with tourism sectors of at least 1,000 employees (in 2009q2), we see changes in employment ranging from a 3.9 percent loss (Bay) to a 7.3 percent gain (Escambia) between 2009q2 and 2010q2. For the most part, counties with more than 1,000 employees in 2009q2 saw either increasing tourism employment over the time period or rebounds in tourism employment after an initial decline. Two exceptions to this were Sarasota and Hernando counties, where tourism employment remained at levels lower than pre-spill levels into 2011.

[7] The extent of oil reaching the coastline was determined from an interactive article in the New York Times, based on federal government reports from air and ground surveys.

Louisiana (Table 15)

Louisiana parishes with more than 1,000 tourism employees in 2009q2 saw either no change or slight increases between 2009q2 and 2010q2 (quarter of the spill). However, in quarters after the spill, Calcasieu, Lafayette, and Terrebonne parishes saw tourism employment declines relative to pre-spill level. On the other hand, St. Tammany, Orleans, and Jefferson parishes saw increasing tourism employment after the spill.

Mississippi (Table 16)

Of the three Mississippi study counties, Hancock County appears to have had the largest negative percentage change in employment in the quarters after the spill. Jackson County maintained no or positive employment change after the spill; Harrison County had two quarters after the spill during which there were negative percentage changes in employment (spanning -2% to 1%). In contrast, Hancock County saw negative percentage changes in tourism employment of 7.7 percent after the spill.

Texas (Table 17)

Harris County, containing Houston, is by far the largest tourism employer among Texas counties. It saw increases in tourism employment following the spill. Cameron County also saw increasing tourism employment over the time period, compared to pre-spill levels. Victoria and Galveston counties saw initial declines in tourism employment followed by rebounding levels in 2011. As discussed in Section 5.4.2, during our field work we learned that some Texas counties actively marketed themselves as alternatives to Louisiana and Florida. In contrast to the increases seen in most of Texas, Jefferson County saw a continuous decline in tourism employment over the study period.

Discussion

For the most part, counties with more than 1,000 tourism employees in 2009q2 experienced either only initial (temporary) declines in tourism-related employment or no initial declines in employment followed by growth. Figure 5 shows this for the counties with the largest tourism employment in each state. It also shows the percentage change from the same quarter in the year before the spill (i.e., the "percentage change between same quarters, one-year and two-year impacts" from Tables 13 to 17). Harrison (Mississippi) and Hillsborough (Florida) both saw an initial decline followed by growth in tourism-related employment following the spill. In contrast, Harris County (Texas) and Orleans Parish (Louisiana) both saw initial and subsequent growth in tourism-related employment following the spill. Mobile County (Alabama) saw no change in tourism-related employment following the spill.

However, two counties with more than 1,000 tourism employees in 2009q2 did see declining tourism-related employment following the spill:

- *Hancock County (Mississippi)* saw a 7.7 percent decline in tourism employment in the second and third quarters of 2010 compared to the same quarters in 2009. The impacts beyond third quarter 2010 could not be reliably estimated due to data disclosure issues among hotels and restaurants over the time period (see note to

Table 16). For the second and third quarters in 2010, the losses in Hancock County were among hotels (NAICS 721), restaurants (NAICS 722), and arts, entertainment, and recreation establishments (NAICS 71).

- *Sarasota County (Florida)* saw declines in tourism-related employment for the three quarters after the spill and then again in second quarter of 2011. These employment losses were concentrated among arts, entertainment, and recreation establishments (NAICS 71) and hotels (NAICS 721).

Table 13

Levels of and Same Quarter Changes in Travel and Tourism (TT) Employment in Alabama and its Counties Following the Deepwater Horizon Oil Spill, Second Quarter 2009 to Fourth Quarter 2011

Alabama Counties	Levels of Employment (thousands of employees)											Percentage Change Between Same Quarters						
												One-Year Impacts				Two-Year Impacts		
	2009			2010				2011				2010:2 to 2009:2	2010:3 to 2009:3	2010:4 to 2009:4	2011:1 to 2010:1	2011:2 to 2009:2	2011:3 to 2009:3	2011:4 to 2009:4
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4							
Baldwin	3.7	3.7	3.3	3.2	3.9	3.8	3.4	3.5	4.2	4.2	3.6	5.4	2.7	3.0	9.4	13.5	13.5	9.1
Mobile	5.6	5.5	5.3	5.3	5.6	5.5	5.3	5.3	5.5	5.5	5.4	0.0	0.0	0.0	0.0	-1.8	0.0	1.9

Note: Columns that are boxed in represent the quarter in which the DWH spill occurred (second quarter 2010).

Table 14

Levels of and Same Quarter Changes in Travel and Tourism (TT) Employment in Florida and its Counties Following the Deepwater Horizon Oil Spill, Second Quarter 2009 to Fourth Quarter 2011

Florida Counties	Levels of Employment (thousands of employees)											Percentage Change Between Same Quarters						
												One-Year Impacts				Two-Year Impacts		
	2009			2010				2011				2010:2 to 2009:2	2010:3 to 2009:3	2010:4 to 2009:4	2011:1 to 2010:1	2011:2 to 2009:2	2011:3 to 2009:3	2011:4 to 2009:4
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4							
Bay	5.1	4.9	4.0	4.2	4.9	4.8	4.2	4.6	5.5	5.5	4.5	-3.9	-2.0	5.0	9.5	7.8	12.2	12.5
Charlotte	1.7	1.6	1.7	1.8	1.8	1.6	1.6	1.8	1.8	1.6	1.7	5.9	0.0	-5.9	0.0	5.9	0.0	0.0
Citrus	1.1	1.1	1.0	1.1	1.1	1.1	1.1	1.0	1.1	1.0	1.0	0.0	0.0	10.0	-9.1	0.0	-9.1	0.0
Collier	8.7	7.4	8.2	8.9	8.6	7.8	8.5	9.3	8.8	8.2	9.0	-1.1	5.4	3.7	4.5	1.1	10.8	9.8
Dixie	0.08	0.08	0.07	0.05	0.04	0.01	0.01	0.02	0.01	0.02	0.01	-46.2	-88.0	-86.3	-67.4	-92.3	-80.0	-93.2
Escambia	4.1	4.2	4.0	4.2	4.4	4.4	4.1	4.2	4.8	4.8	4.5	7.3	4.8	2.5	7.3	0.0	17.1	14.3
Franklin	0.3	0.3	0.2	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	-3.7	7.7	8.7	4.0	7.4	7.7	8.7
Gulf	0.2	0.2	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	-54.4	-61.1	-51.4	-9.7	-60.0	-63.3	-62.1
Hernando	1.4	1.3	1.3	1.3	1.4	1.3	1.4	1.3	1.3	1.2	1.3	-2.9	0.8	3.8	-3.0	-7.1	-6.9	-3.8
Hillsborough	19.6	19.0	19.1	18.8	19.4	19.2	19.0	20.1	20.5	20.2	20.3	-1.0	1.1	-0.5	6.9	4.6	6.3	6.3
Jefferson	0.04	0.04	0.04	0.04	0.04	0.01	0.01	0.04	0.09	0.08	0.01	8.1	-65.7	-63.9	11.1	129.7	120.0	-69.4
Lee	10.9	10.0	5.3	10.1	10.5	10.3	9.5	10.9	10.9	10.1	10.3	-3.7	3.0	79.2	7.9	0.0	1.0	94.3
Levy	0.3	0.2	0.2	0.3	0.3	0.2	0.2	0.3	0.3	0.2	0.3	-8.9	-0.8	-5.3	1.2	-8.2	0.8	8.9
Manatee	3.7	3.3	3.5	3.8	3.8	3.6	3.6	3.8	3.8	3.7	3.9	2.7	9.1	2.9	0.0	2.7	12.1	11.4
Monroe	6.3	5.9	6.1	6.6	6.8	6.4	6.6	7.1	7.1	6.8	7.0	7.9	8.5	8.2	7.6	12.7	15.3	14.8
Okaloosa	3.6	3.6	3.0	3.3	3.9	3.7	3.0	3.1	4.0	3.8	3.3	8.3	2.8	0.0	-6.1	11.1	5.6	10.0
Pasco	3.6	3.4	3.3	3.5	3.6	3.4	3.5	3.7	3.6	3.5	3.6	0.0	0.0	6.1	5.7	0.0	2.9	9.1
Pinellas	17.2	16.1	15.8	16.1	16.9	16.3	16.0	16.4	17.0	16.8	16.5	-1.7	1.2	1.3	1.9	-1.2	4.3	4.4
Santa Rosa	1.2	1.2	1.1	1.1	1.2	1.2	1.2	1.2	1.4	1.4	1.3	0.0	0.0	9.1	9.1	16.7	16.7	18.2
Sarasota	6.7	6.3	6.5	6.6	6.5	6.1	6.2	6.7	6.5	6.3	6.5	-3.0	-3.2	-4.6	1.5	-3.0	0.0	0.0
Taylor	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	22.8	18.7	16.7	-2.5	17.2	16.5	18.4
Wakulla	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.02	0.03	0.03	0.03	-6.3	0.0	0.0	-17.9	6.3	10.0	0.0
Walton	2.3	2.3	1.8	1.9	2.3	2.2	1.8	2.0	2.6	2.6	2.1	0.0	-4.3	0.0	5.3	13.0	13.0	16.7
Washington	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	3.8	-9.6	-5.1	3.8	-6.5	9.0	0.0

Note: Columns that are boxed in represent the quarter in which the DWH spill occurred (second quarter 2010).

Table 15

Levels of and Same Quarter Changes in Travel and Tourism (TT) Employment in Louisiana and its Parishes Following the Deepwater Horizon Oil Spill, Second Quarter 2009 to Fourth Quarter 2011

Louisiana Parishes	Levels of Employment (thousands of employees)											Percentage Change Between Same Quarters						
												One-Year Impacts				Two-Year Impacts		
	2009			2010				2011				2010:2 to 2009:2	2010:3 to 2009:3	2010:4 to 2009:4	2011:1 to 2010:1	2011:2 to 2009:2	2011:3 to 2009:3	2011:4 to 2009:4
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4							
Calcasieu	5.9	6.0	5.9	5.8	5.9	5.8	5.7	5.6	5.7	5.8	5.6	0.0	-3.3	-3.4	-3.4	-3.4	-3.3	-5.1
Cameron	0.08	0.08	[a]	0.08	0.08	0.08	0.08	0.07	0.05	0.05	0.05	-4.8	-6.0	[a]	-12.3	-34.9	-34.9	[a]
Iberia	0.6	0.6	0.6	0.5	0.5	0.5	0.5	0.5	0.5	0.6	0.5	-4.6	-5.1	-6.4	-4.6	-2.5	-5.4	0.9
Jefferson	7.0	7.0	7.0	6.9	7.3	7.2	7.1	7.1	7.1	7.3	6.7	4.3	2.9	1.4	2.9	2.0	4.3	-4.3
Lafayette	4.2	4.1	4.0	4.0	4.2	4.1	4.0	3.9	4.0	4.1	4.0	0.0	0.0	0.0	-2.5	-4.8	0.0	0.0
Lafourche	0.8	0.8	0.8	0.8	0.8	0.9	0.8	0.8	0.8	0.9	0.9	0.2	2.0	3.8	0.2	2.1	1.9	4.1
Orleans	15.9	15.4	16.0	16.1	16.3	16.3	16.8	17.1	17.0	17.2	17.7	2.5	5.8	5.0	6.2	6.9	11.7	10.6
Plaquemines	0.3	0.3	0.3	0.3	0.4	0.4	0.4	0.4	0.4	0.4	0.4	23.1	27.5	28.0	33.6	25.6	26.3	25.7
St. Bernard	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	11.7	13.6	30.2	4.5	20.0	16.9	39.6
St. Charles	0.3	0.3	0.3	0.3	0.3	0.4	0.3	0.3	0.4	0.4	0.4	14.4	5.6	7.1	11.6	19.4	13.0	11.6
St. John the Baptist	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	-1.3	-4.5	3.7	2.5	-1.1	-5.6	2.4
St. Mary	0.9	0.7	0.7	0.7	0.7	0.8	0.8	0.8	0.8	0.8	0.8	-15.8	5.4	5.5	9.9	-7.3	7.8	9.1
St. Tammany	2.6	2.7	2.5	2.5	2.7	2.7	2.6	2.6	2.9	2.9	2.7	3.8	0.0	4.0	4.0	11.5	7.4	8.0
Tangipahoa	1.2	1.3	1.2	1.2	1.2	1.3	1.2	1.2	1.3	1.3	1.3	0.0	0.0	0.0	0.0	8.3	0.0	8.3
Terrebonne	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.3	1.3	1.4	1.3	0.0	0.0	0.0	-7.1	-7.1	0.0	-7.1
Vermilion	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	-9.3	-7.1	1.4	-2.2	-8.0	-5.8	-0.3

Note: Columns that are boxed in represent the quarter in which the DWH spill occurred (second quarter 2010).
[a] Not reported due to data disclosure issues.

Table 16

Levels of and Same Quarter Changes in Travel and Tourism (TT) Employment in Mississippi and its Counties Following the Deepwater Horizon Oil Spill, Second Quarter 2009 to Fourth Quarter 2011

Mississippi Counties	Levels of Employment (thousands of employees)											Percentage Change Between Same Quarters						
													One-Year Impacts			Two-Year Impacts		
	2009			2010				2011										
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2010:2 to 2009:2	2010:3 to 2009:3	2010:4 to 2009:4	2011:1 to 2010:1	2011:2 to 2009:2	2011:3 to 2009:3	2011:4 to 2009:4
Hancock	1.3	1.3	0.3 [a]	1.2	1.2	1.2	0.3 [a]	0.3 [a]	0.3 [a]	0.3 [a]	0.3 [a]	-7.7	-7.7	[a]	[a]	[a]	[a]	[a]
Harrison	11.8	11.7	11.3	11.1	11.6	11.7	11.2	11.2	11.8	11.9	11.5	-1.7	0.0	-0.9	0.9	0.0	1.7	1.8
Jackson	1.4	1.4	1.3	1.4	1.5	1.4	1.4	1.4	1.5	1.5	1.4	7.1	0.0	7.7	0.0	7.1	7.1	7.7

Note: Columns that are boxed in represent the quarter in which the DWH spill occurred (second quarter 2010).
[a] These values for employment and the associated percentage changes are associated with a data disclosure issue. The number of employees in the hotels sector (NAICS 721) and the restaurants sectors (NAICS 722) were non-disclosed for 2009q4, 2010q4, and all of 2011.

Table 17

Levels of and Same Quarter Changes in Travel and Tourism (TT) Employment in Texas and its Counties Following the Deepwater Horizon Oil Spill, Second Quarter 2009 to Fourth Quarter 2011

Texas Counties	Levels of Employment (thousands of employees)											Percentage Change Between Same Quarters						
												One-Year Impacts				Two-Year Impacts		
	2009			2010				2011				2010:2 to 2009:2	2010:3 to 2009:3	2010:4 to 2009:4	2011:1 to 2010:1	2011:2 to 2009:2	2011:3 to 2009:3	2011:4 to 2009:4
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4							
Aransas	0.5	0.5	0.4	0.4	0.5	0.5	0.5	0.4	0.4	0.5	0.4	4.6	5.4	9.6	-11.8	-2.6	1.3	-3.4
Brazoria	2.2	2.2	2.2	2.1	2.2	2.2	2.2	2.2	2.3	2.3	2.3	0.0	0.0	0.0	4.8	4.5	4.5	4.5
Calhoun	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	-1.5	5.8	6.8	15.8	19.9	18.4	22.9
Cameron	4.0	4.0	3.7	3.9	4.1	4.2	3.8	3.9	4.3	4.3	4.0	2.5	5.0	2.7	0.0	7.5	7.5	8.1
Chambers	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	7.0	-12.7	-5.0	3.8	5.0	-7.7	-3.3
Galveston	4.8	5.0	4.6	4.4	4.9	4.9	4.5	4.5	5.1	5.1	4.7	2.1	-2.0	-2.2	2.3	6.3	2.0	2.2
Harris	59.7	58.6	57.2	56.2	61.2	61.1	57.8	59.0	61.1	60.9	60.6	2.5	4.3	1.0	5.0	2.3	3.9	5.9
Jefferson	3.1	3.1	3.1	3.0	3.0	2.9	3.0	2.9	3.0	2.9	2.9	-3.2	-6.5	-3.2	-3.3	-3.2	-6.5	-6.5
Jim Wells	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	-3.1	3.7	7.3	-3.1	11.4	7.5	11.8
Kenedy	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Kleberg	0.34	0.34	0.34	0.33	0.33	0.32	0.33	0.37	0.38	0.39	0.41	-1.8	-6.7	-0.6	10.5	13.0	13.1	21.1
Liberty	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	-10.7	-8.5	-1.3	8.6	-2.7	0.9	5.5
Matagorda	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	-0.9	1.0	-6.3	-7.9	-8.0	-4.3	-8.6
Nueces	5.8	5.8	5.3	5.2	5.8	5.8	5.4	5.3	5.7	5.7	5.6	0.0	0.0	1.9	1.9	-1.7	-1.7	5.7
Orange	0.7	0.7	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	-3.9	-2.6	-1.8	-2.3	-7.2	-7.0	-6.9
Refugio	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	-1.8	-3.6	-1.9	0.0	-3.6	-5.5	1.9
San Patricio	0.7	0.7	0.6	0.6	0.6	0.6	0.6	0.6	0.7	0.6	0.6	-6.6	-6.0	-2.5	2.0	2.8	-2.7	2.0
Victoria	1.0	1.0	0.9	0.9	1.0	0.9	0.9	0.9	1.0	1.0	0.9	-2.0	-2.6	-1.5	1.1	0.2	1.7	3.4
Willacy	0.10	0.10	0.10	0.09	0.09	0.09	0.05	0.10	0.06	0.10	0.05	-6.9	-8.3	-46.3	3.2	-45.5	1.0	-43.2

Note: Columns that are boxed in represent the quarter in which the DWH spill occurred (second quarter 2010).

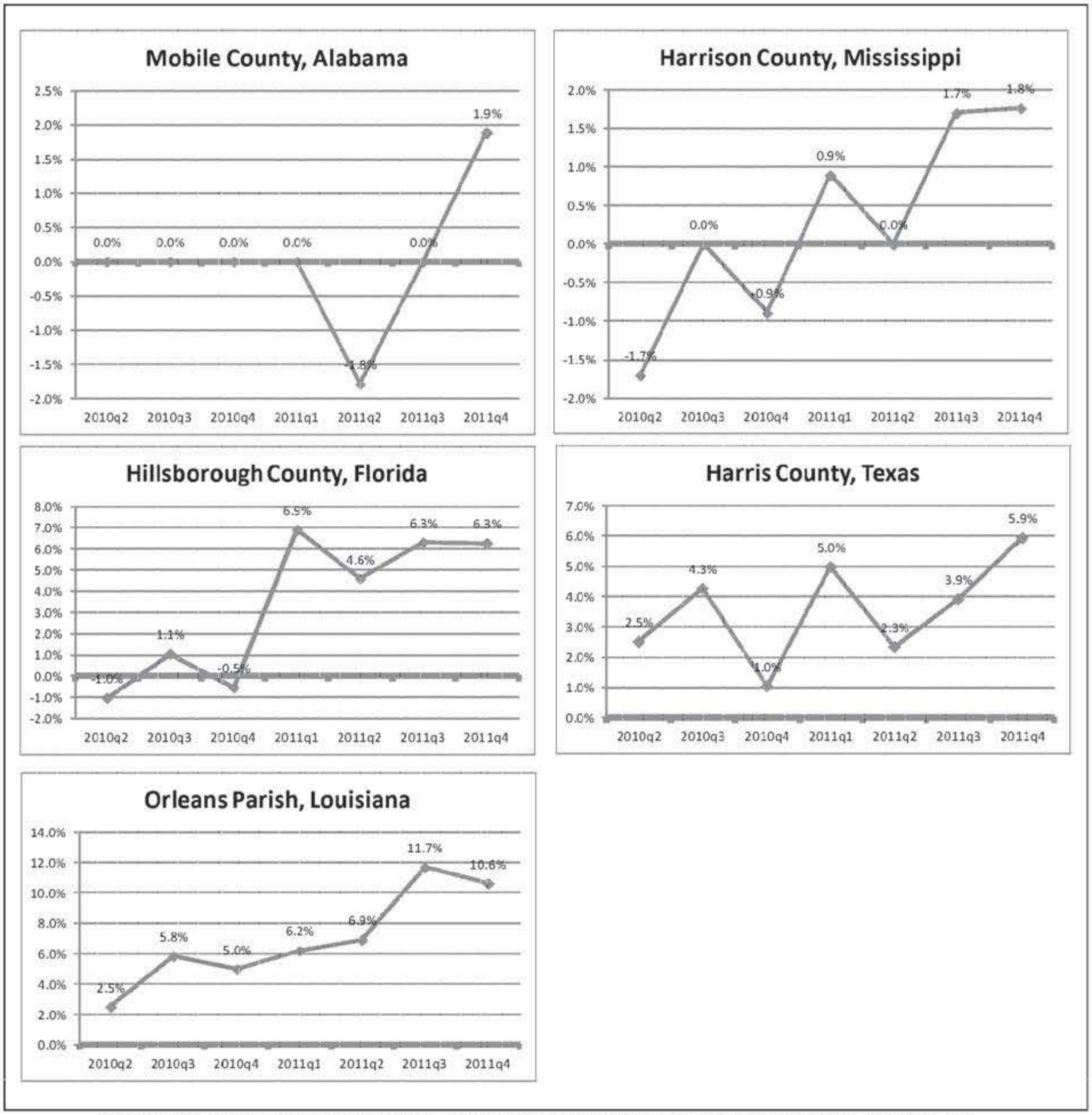


Figure 5: Percentage Changes in Tourism Employment for Largest Counties or Parishes in Each State, Second Quarter 2009 to Fourth Quarter 2011

Perspectives on the Impacts of the *Deepwater Horizon* Oil Spill on Gulf Tourism from Field Work in the Gulf, we see that the distribution of losses by claimants' residences (Figure 2) is much broader than by location of physical loss (Figure 1). This indicates that many who experienced a loss resided away from the coast. These data indicate a broader impact than depicted in Figure 1.[8] Also, viewing the losses from the perspective of claimants' residences reduces the concentration of losses along the western coast of Florida. The area covered by the line measuring the extent of oil reaching the shore, however, remains the area of the largest number of claims.

[8] Although not depicted in Figure 2, there are claimants outside of the Gulf region.

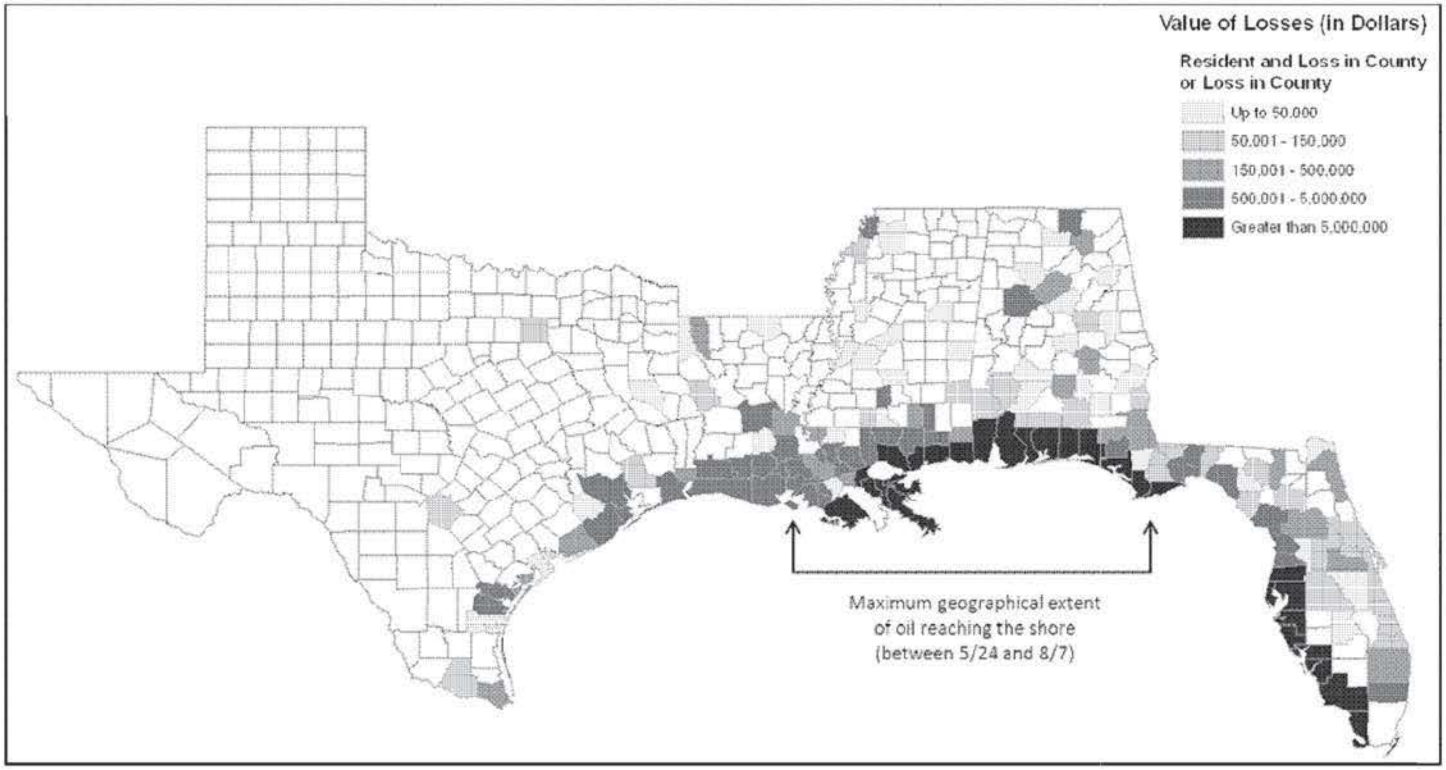


Figure 1: Value of Physical Losses (Paid Claims) in Gulf Counties (TX, LA, MS, AL, and FL): BOEM Tourism and Recreation Claims Only

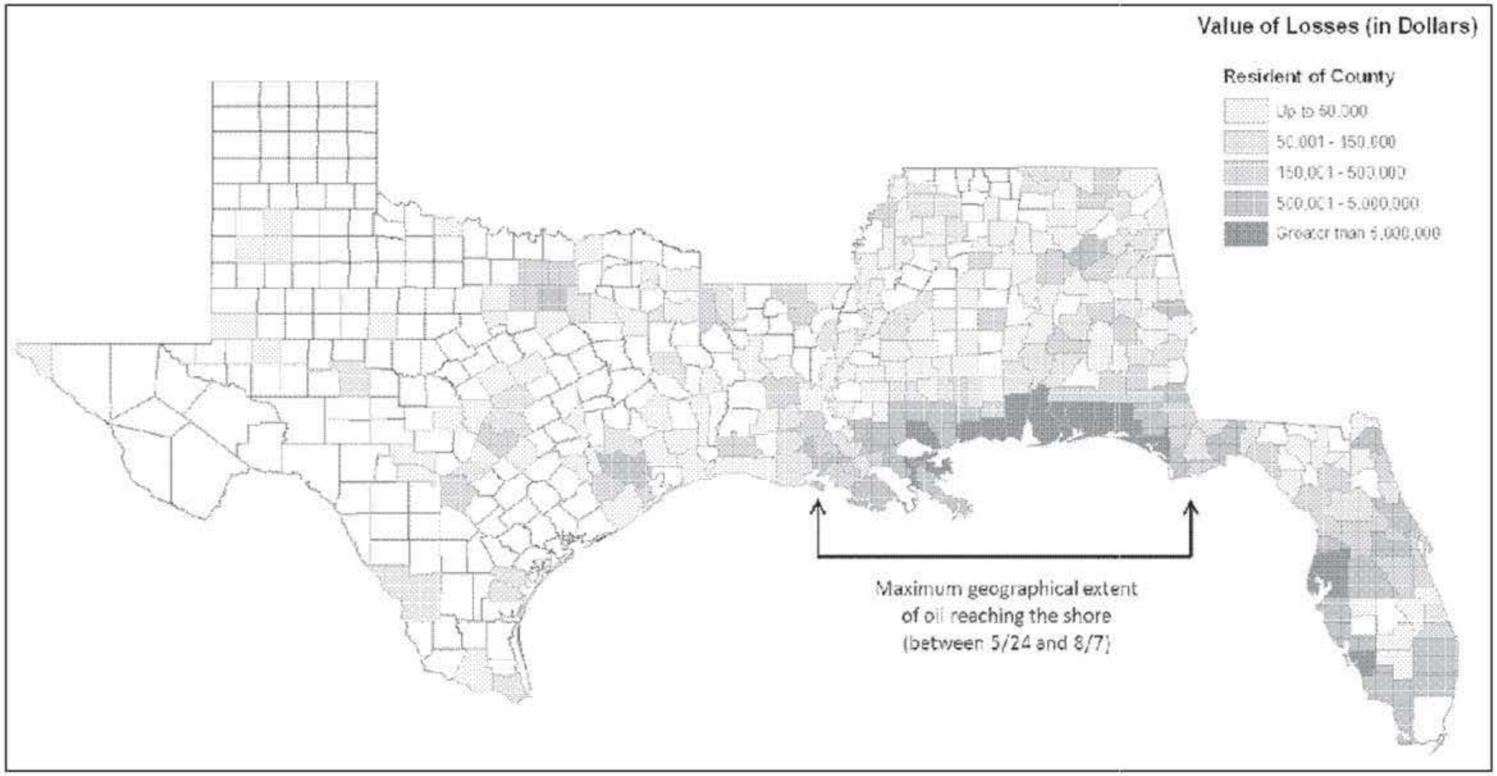


Figure 2: Value of Losses (Paid Claims) for Residents of Gulf Counties (TX, LA, MS, AL, and FL): BOEM Tourism and Recreation Claims Only

3.0 PERSPECTIVES ON THE IMPACTS OF THE *DEEPWATER HORIZON* OIL SPILL ON GULF TOURISM FROM NEWSPAPER COVERAGE AND TOURISM BUREAU WEBSITES

3.1 OVERVIEW

To gather local level perspectives on the DWH oil spill, ERG collected information from county and parish tourism and visitor agency websites and area newspaper articles about travel, tourism, and recreation impacts related to the oil spill. This section presents the methods and synthesized findings for each of these efforts. It begins by discussing the identification and review of local tourism and visitor agency information and is followed by a section on the review of relevant newspaper articles.

3.1.1 TOURISM AND VISITORS AGENCIES

ERG identified county- and parish-level tourism bureaus and Chambers of Commerce for each of the coastal Gulf counties and parishes and collected contact information (where available) from the each bureau's website.[9] ERG found the data sources were not grouped on a 1:1 county to bureau relationship, i.e., not all counties and parishes had one Chamber of Commerce and one tourism bureau apiece. We located the desired information by either starting with the county government website to collect tourism information, particularly parks and recreation departments, or following the links provided on the county websites. ERG classified the following variations as "tourism bureaus":

- Tourism development bureau
- Tourism commission
- Convention and visitor bureau (CVB)
- Tourism center
- Convention and visitor center

In some cases, particularly counties and parishes with large cities, tourism information was not promoted at the county or parish level. If county- or parish-level research did not produce results, ERG reviewed the Chamber of Commerce and tourism bureaus for cities in the county (e.g., Anna Maria Island for Manatee County in Florida; Houston for Harris County in Texas).

3.1.2 NEWSPAPER ARTICLES

ERG used Google to search the Internet for multi-regional, county-, parish-, city-, and community-level newspapers in each county or parish. ERG identified approximately 150 newspapers for the 54 coastal counties and parishes. Of those, approximately half did not have an online presence, search tool, or were specialized (e.g., Spanish language). From this list, ERG

[9] Social media sources, such as Facebook and Twitter, were not searched as part of this information collection effort.

used the search tool with keyword combinations and collected relevant articles from January 2012 back to April 20, 2010 (i.e., the day of the DWH spill).

Approximately 25 newspapers appeared to be very small and had a less sophisticated online presence than larger newspapers. A key word search of "tourism" was used to locate articles that were focused on very specific items, such as permits for development or a Chamber of Commerce meeting. If the keyword combination of "tourism, oil" was used, no relevant articles were found. Occasionally, a small newspaper, like the *Anna Maria Island Sun*, did yield a number of articles relevant to the task.

For moderate- to larger-sized newspapers, ERG relied primarily on the keyword search of "tourism and oil." During the review of the first five newspapers, ERG also tried additional searches with keywords, such as "oil spill," "Macondo," "Deepwater Horizon" to determine if different articles would appear. ERG did not find this to be the case, and for the remainder of the searches, "tourism and oil" was used. Due to concerns that recreational fishing may not be adequately captured, keyword searches on "fish," and "fish and oil" were performed, but yielded a large number of non-relevant results.

Three newspapers required a fee to access archived articles. Based on the titles and the locations of the newspaper, ERG determined that the purchase of these articles was not necessary, because enough information was collected from other sources. Additionally, almost every newspaper's archives went back to at least April 2010.

After search results were returned, an ERG project team member reviewed the article for relevance to avoid duplication (e.g., an Associated Press article was collected only once regardless of how many newspapers had printed it). Approximately 90 percent of the time, the team member "approved" the article for relevancy and it was saved as a PDF for the archive. The rejected articles (about 10 percent of those found) were either opinion pieces or political statements.

Articles were then logged into a Microsoft® Excel® tracking sheet that captured key information, such as author, article publication date, newspaper, and keywords to summarize the article contents. The location column in the spreadsheet identifies what county or parish the article is about. Many articles covered a wide area, which made defining the local level difficult. Many articles were labeled as entire Gulf coast or under the broader state.

3.2 FINDINGS

This section describes the findings from the review of tourism bureau websites and newspaper articles pertaining to tourism-related impacts of DWH. The findings associated with the review of tourism bureau websites are presented first, beginning with general findings and followed by state-specific results. Next, findings from the review of newspaper articles are presented, beginning with themes from the broader Gulf region and narrowing to themes by state. State-based findings in each section are presented in alphabetical order.

3.2.1 Tourism and Visitors Agencies

The review of tourism bureau websites that occurred during the timeframe from October 2011 through March 2012 revealed that there was virtually no mention of DWH or the oil spill. There were more references, especially in Louisiana parishes, to rebuilding after Hurricane Katrina than to the oil spill. Notably, many Chamber and tourism bureaus' websites listed BP as a sponsor. Instead of focusing on the oil spill, website messaging in the study area focused on attracting visitors and informing residents or relaying organizational information.

Overall, counties or parishes that had large cities were less likely to have county or parish chamber websites or tourism bureaus, and the cities' websites were the dominant source of tourism and recreation information. Counties and parishes with large cities tended to have more information for tourists, while those without big cities promoted themselves as refuges from the big city. Counties and parishes without large cities also targeted people who might be relocating to the area rather than potential visitors, and some of these more heavily promoted their beaches.

Visitor attractions and recreational opportunities varied by state and county and parish, but virtually all states, counties, and parishes listed seafood and diverse cuisine as an attraction. To highlight the variety of tourist website messaging, the sections below summarize findings for each state.

Alabama

The websites for Alabama' two coastal counties, Baldwin and Mobile, focused on beaches and swampland, respectively. Both counties drew attention to Battleship Memorial Park and the U.S.S. *Alabama*. Compared to counties in other nearby states, both counties also listed numerous local parks.

Florida

About 80 percent of the Florida websites we reviewed targeted tourists (rather than residents) and many used live cameras, videos, pictures, to advertise beaches and other attractions. Convention and visitors bureaus, tourism bureau, and external websites had a greater focus on nature than Chamber of Commerce websites. Chamber websites tended to promote resorts, hotels, and restaurants more than natural or wildlife attractions. The majority of counties highlighted their beaches and beach parks, and none of them mentioned any concerns related to lingering effects of the oil spill. Websites also had a strong focus on theme parks.

Louisiana

In Louisiana, parish Chamber of Commerce websites targeted businesses and provided little information for tourists or visitors. Many parishes did not have a Chamber of Commerce or tourism bureau website, but in those cases, a city website was usually available. Official city websites targeted primarily residents and offered little information for tourists, but some had relocation information that was comparable to the content of tourism bureau websites.

The websites for Louisiana tended to encompass broader regions and themes (rather than a specific parish or county) than those in other states. For example, websites highlighted Cajun traditions, Mardi Gras, and swamp and marsh tours. Unlike on many of the other Gulf Coast states' websites, there was no mention of beaches. Instead, many state-wide or area-wide websites focused on tourist, natural, and wildlife attractions, such as the wildlife National Atchafalaya Heritage Area, and the Bayou Teche National Wildlife Refuge. The diversity of cultures (French, Cajun, Islander, and Native American) was also heavily promoted on websites reviewed.

Mississippi

Mississippi had one of the only websites that mentioned the DWH oil spill;[10] however, in general, little information on tourism and recreation was available at the county level. Hancock and Harrison counties had tourism bureau websites; Jackson had a Chamber of Commerce website aimed more at residents. There was significantly more relevant information from tourism bureaus at the city level, and recreational activities promoted among the coastal counties included several national seashores and bird watching.

Texas

In Texas, city chambers and tourism websites were more frequently found to provide tourism and recreation information than county websites. Bird-watching and recreational fishing were common attractions in most of Texas' coastal counties. The types of advertising and activities varied between northern and southern Texas counties, with northern counties directing advertising more at people who might move to the area, and southern counties tended to advertise more to tourists. Northern counties tended to draw attention to hunting and southern counties focused more on fishing, birding, and water sports.

3.2.2 Newspaper Articles

This section presents the findings from the review of local newspapers for stories related to the DWH oil spill. Findings for the Gulf region as a whole are presented first, followed by findings organized by study state (in alphabetical order). Each section presents the key themes that emerged from the review of articles, arranged by the categories of:

- Before the DWH oil spill,
- Oil spill impacts, and
- Recovery.

[10] The City Chamber of Commerce for Biloxi in Harrison County mentioned the oil spill in reference to a video entitled titled "Biloxi Booming after Katrina and Spill Disasters."

Gulf Coast Region

In our review of the newspaper articles, we identified the following themes that applied to the region as a whole:

Before the DWH spill

Although available, ERG did not summarize this information for the Gulf region as a whole.

Oil Spill Impacts

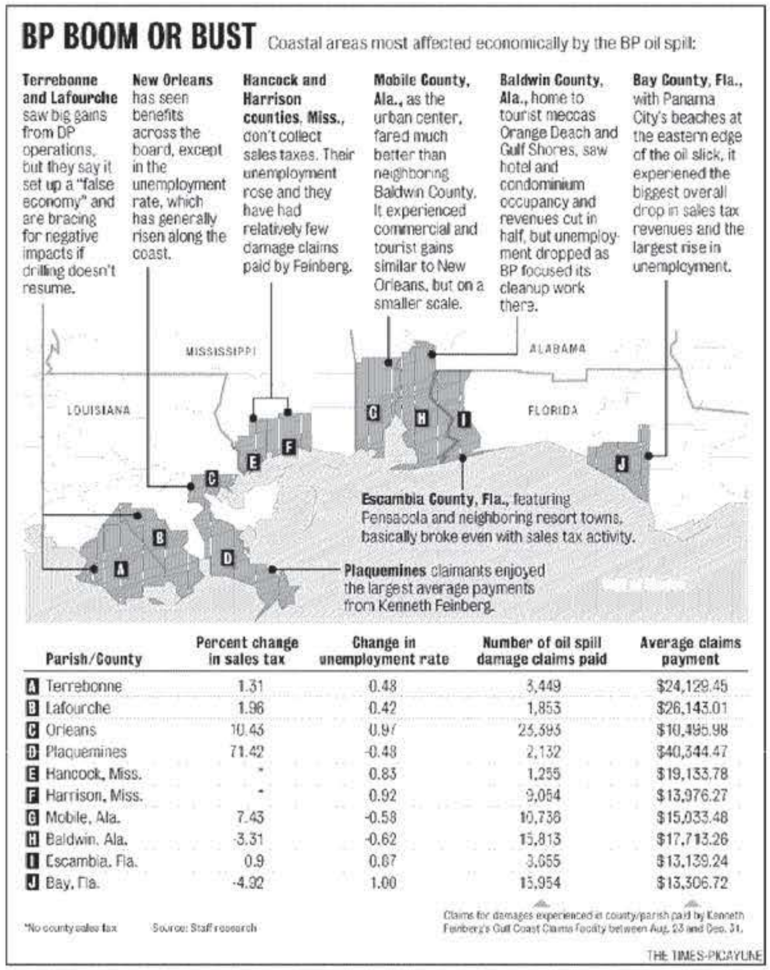
- ***The public lacked awareness of where, exactly, the oil spill impacts were located.*** Uncertainty of where and when the oil would land caused much confusion that translated into misperceptions of what areas were impacted (AP-Port Arthur News, June 2010). Many articles also discussed the media's role in shaping public perception about the spill impacts.
- ***Internet and social media played an important role in promoting clean beach message.*** Tourism officials used Facebook and other social media to get out their message, convince people the beaches were clean, promote events, and connect with visitors on a more personal level (Rice, 2010; AP-The Destin Log, April 2011).
- ***Surveys indicated that the oil spill changed Gulf region vacation plans.*** Several surveys indicated that some tourists vacationed elsewhere within the Gulf region because of the oil spill, while areas not directly affected by the oil spill tried to attract tourists. A national survey found, for example, that one-third of Americans said the spill would affect the likelihood that they would travel to the Gulf Coast in 2010. Of those respondents, about 80 percent said they were either "less likely" or "much less likely" to visit the region (Talbot, 2010). Many reported a sense that tourists went elsewhere, such as Atlantic coast sites such as Myrtle Beach, South Carolina (Aversa, 2010), and this sense was corroborated by rising hotel occupancy rates in several non-coastal tourists destinations, including Charleston, South Carolina (11% increase), Savannah, Georgia (7% increase), and Beaufort, South Carolina (5% increase) (Williams, 2010).[11]
- ***Occupancy rates may have been misleading.*** Many articles mentioned that the national economic recession had dampened travel, tourism, and recreation in 2009 and noted that the number of relief workers, rather than the numbers of tourists, was propping up local hotel numbers. For example, during the first two weeks of May 2010, hotels within 10 miles of the coast in Alabama, Louisiana, and Mississippi saw occupancy rates rise dramatically—in some cases by a third or more over the same time last year. The data could be misleading, partly because 2009 was considered a

[11] Rates in 2010 compared to 2009.

"down year" for hotels, but largely because occupancy rates often swell with government and relief workers after disasters (Reed, 2010).

- ***The oil spill resulted in economic impacts that varied across the Gulf.*** Several articles discussed the estimated economic losses attributable to the DWH oil spill. For example, the U.S. Travel Association released a study that cited an estimated loss of at least $7.6 billion in tourism revenues; BBVA Compass projected the spill would cost the four Gulf Coast states a combined $4.3 billion in economic losses; and another article reported a potential loss of $22.7 billion over three years (Williams, May 2010; Dlouhy, 2010; Dallas Morning News, 2010). Wells Fargo estimated that up to 250,000 Gulf jobs in fishing, tourism and energy would be lost, and the new jobs in cleanup would not make up for what has been lost (Aversa, 2010). One article noted that even with a S500 million infusion from BP to promote tourism, it was estimated that tourism revenues could drop to $15.2 billion (Schwartz, 2011).

- Other discussed the oil spill impacts on coastal counties and states to varying extents, as depicted in Figure **3** (Hammer, 2011). The figure highlights that Bay County, Florida saw large decreases in sales taxes and large increases in unemployment following the spill. On the other hand, Escambia County, Florida to the West saw a slight increase in sales tax. The figure also shows the variance of the number and value of BP claims funding across the Gulf Region.



Parish/County	Percent change in sales tax	Change in unemployment rate	Number of oil spill damage claims paid	Average claims payment
A Terrebonne	1.31	0.48	3,449	$24,129.45
B Lafourche	1.96	0.42	1,853	$26,143.01
C Orleans	10.43	0.97	23,393	$10,495.98
D Plaquemines	71.42	-0.48	2,132	$40,344.47
E Hancock, Miss.	*	0.83	1,255	$19,133.78
F Harrison, Miss.	*	0.92	9,054	$13,976.27
G Mobile, Ala.	7.43	-0.58	10,736	$15,033.48
H Baldwin, Ala.	-3.31	-0.62	15,813	$17,713.26
I Escambia, Fla.	0.9	0.87	3,655	$13,139.24
J Bay, Fla.	-4.92	1.00	15,954	$13,306.72

*No county sales tax Source: Staff research

Claims for damages experienced in county/parish paid by Kenneth Feinberg's Gulf Coast Claims Facility between Aug. 23 and Dec. 31.

THE TIMES-PICAYUNE

Figure 3: Oil Impacts Differ Across the Region (Hammer, 2011)

- ***The oil spill resulted in beach closures and impacts to recreational fishing.*** Access to beaches and recreational fishing waters was hampered by the oil spill. The Natural Resources Defense Council issued a report at the end of July 2010 showing more than 2,000 beach closing, advisories, and notices were issued in the Gulf region because of the oil spill compared with 237 in 2009 (AP-The Times-Picayune, July 28, 2010). Because of the DWH spill, portions of the Gulf had been closed to recreational fishing; fishermen caught only one-third of their 3.4-million-pound quota of red snapper from areas outside the closed areas (Gulf Breeze News, September 2010).

Recovery

- ***Tourism was strong in 2011.*** The Gulf Coast Alliance, a regional business group set up after the spill to attract tourists and investors to the Gulf Coast, reported that summer tourism in 2011 was good and the economy better than people had anticipated (Burdeau, 2011).

Alabama

Before the DWH spill

No information was available to summarize.

Oil Spill Impacts

The oil spill was anticipated to heavily impact Alabama's economically important coastal tourism industry. A variety of newspaper articles emphasized the importance of coastal tourism to Alabama's economy. For example, in 2009, visitors spent about $2.3 billion in the Alabama tourism sector, creating about 40,000 jobs (Busby, 2011). About 53,000 employees work on the Alabama coast in jobs either directly or indirectly related to tourism (Galofaro, September 2011). Alabama's beach areas, which include Orange Beach, Gulf Shores, Foley, and Dauphin Island, account for approximately $2.3 billion in annual tourism spending. About $1.7 billion of that spending takes place in the three months from Memorial Day to Labor Day. Ten percent of the Baldwin County Public School System's $280 million annual budget is derived from tourism-related spending (December, June 11, 2010). In November 2010, the University of Alabama estimated that the state's economy would lose between $1 billion and $3.3 billion in economic activity in 2010 because of the oil spill. (Amy, November 2010).

- ***The 2010 tourism season was affected by the oil spill.*** A range of articles discussed the impact of the oil spill on the 2010 tourism season. Regionally, attendance at Alabama Gulf Coast beaches was about 3.6 million in 2010, down from 4.6 million in 2009, according to the Alabama Tourism Department. Among those who vacationed on the state's coastal beaches, most were staying at discounted rates, which meant a decrease in revenues (Harvey, 2011). The communications manager of Gulf Shores and Orange Beach reported a 41 percent decline in tourists in 2010, and lodging revenue for Baldwin County fell 33 percent ($58 million) during the summer of 2010 compared to 2009 (Ferrara, November 6, 2010). In contrast, Mobile County served as the headquarters of the BP-U.S. Coast Guard unified command and saw lodging increases of 54 percent over the same period in 2009 (Hammer, 2011; Ferrara, November 6, 2010).

- ***Non-beach attractions saw a significant decrease in visitors.*** Articles discussed that the non-beach areas throughout Alabama saw a decrease in visitors after the spill. For example, in 2010, Gulf Shores State Park saw 300,000 fewer visitors than it had in the previous year; the U.S.S. *Alabama* Battleship Memorial Park saw about 46,000 fewer visitors, a decrease that officials have connected to the oil spill (Ferrara, February 2011). Spots that rely on traffic from Interstate 10[12] saw a decline. In May 2010, attendance was down a total of about 7 percent at 11 attractions, including the Gulf Coast Exploreum Science Center (Ferrara, July 2010). With spill response workers filling the hotels, tourists were left with limited lodging options, and that meant fewer tourists were spending money on attractions such as the U.S.S. *Alabama* Battleship and the Mobile Carnival Museum (Schwartz, 2010).
- ***Tourist volume increased in northern parts of the state.*** There was some indication of a shift in tourism from Alabama's coast to the state's northern counties. The Alabama Mountain Lakes Association, which represents 16 counties across the top of northern Alabama, reported that lodging tax receipts were up 10 percent when compared to those of June 2009 and June 2010 (Peck, 2010).

Recovery

- ***Tourism gained momentum by winter of 2010-2011 and credit is given to BP money.*** Several articles noted the tourism economy in Alabama's coastal counties bouncing back after the oil spill. For example, after a 47 percent drop in attendance after the 2010 spill, Baldwin Beach (located in Gulf Shores) was expected to hit a record 5 million visitors in 2011 (based on projections made in November 2011). Lodging revenue for the summer of 2011 was up 16 percent over 2009 revenues, and retail spending was up nine percent. The increase in tourism revenues was attributed to a marketing campaign funded with BP dollars (Busby, 2011). Winter lodging revenues for Pleasure Island were a record $20.7 million, surpassing $17.5 million in 2007, the previous strongest fiscal year on record. Gulf Shores saw a 12 percent increase in tax collections from January through April (Ferrara, June 2011). Orange Beach topped a 2007 record for spring tourism with visitors spending $65 million on lodging from March to May 2011, a 14 percent increase from the 2007 record (AP-Press Register, 2011). On Alabama's coast, tourists spent $55 million on lodging in

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[12] Interstate 10 is the southernmost transcontinental highway in the American Interstate Highway System. It reaches from Jacksonville, Florida, to Santa Monica, California. In the Gulf region, it stretches across the southernmost portion of Alabama, Louisiana, and Mississippi, along the Florida panhandle, and through Texas.

June 2011, more than eight percent higher than the record set in 2007 before the oil spill and recession (Galofaro, September 2011).

Florida

Before the DWH spill

- ***2010 was predicted to be a better tourism year than 2009.*** Tourism in Florida appeared to be rebounding in 2010 after the 2008-2009 recession, with approximately 23 million people coming to the state during the first three months of 2010, up nearly three percent from 2009 (Huettle, May 2010).

Oil Spill Impacts

- ***Large losses were predicted for Florida's tourism industry following the oil spill.*** Several articles noted the importance of the tourism industry to Florida's economy, stating that tourists spend $60 billion a year in Florida and account for nearly a quarter of all of the state's tax revenue (AP-The Times-Picayune, May 2010). Wildlife viewing activities generate more than $3 billion in Florida each year, and, on average, 35 million fishing trips are taken in the state each year[13] (Tampa Bay Times, 2010). Articles also included predictions of the spill-related losses to the tourism industry associated. For example, BBVA Compass projected that Florida had the most at stake among Gulf Coast states: a potential loss of $2.8 billion in tourism, including $138 million in recreational fishing (Williams, May 2010). Another article noted that if Florida lost just five percent of its annual visitors, the economic consequences would equate to $3 billion in lost visitor spending, $182.5 million in lost sales tax collections, and 48,000 lost jobs (Trigaux, 2010).
- ***The Panhandle was the hardest hit region in the state.*** Tourism officials say the Panhandle region typically brings in 70 percent of its yearly income[14] between the months of June and August. Though only 16 of the 180 beaches in the western part of the Panhandle were affected by the spill, tourism officials said many potential visitors stayed away, deterred by images of oil-slicked waters and tar-ball strewn beaches in other parts of the region (AP-The Times-Picayune, August 2010). A comparison of May through September 2009 and the same period in 2010 showed that taxable sales in tourist-sensitive categories, such as lodging, restaurants, bars, and amusement and recreation, fell significantly in northwest Florida at a time when the same categories increased statewide (Gulf Breezes, December 2010). At the county level, Walton County Tourist Development Council reported in May 2010 that occupancy levels were down six percent, food and beverage revenue was down sixteen percent, and revenue from additional products and services sold was down 32 percent (Walton Sun, 2010). In Escambia County, where Pensacola is located, and in

[13] Presumably, some of these trips occur on inland lakes and streams. The article did not distinguish between inland and coastal or off-shore fishing.
[14] The article does not specify that this is income specific to tourism.

Bay County, home to Panama City, 2010 sales tax revenues stayed flat or decreased, while already high unemployment rates increased (Hammer, 2011).

- ***Areas where oil had not washed onto beaches saw smaller negative impacts to tourism and recreation.*** In Florida counties that were not directly impacted by oil, the tourism and recreation impacts were somewhat smaller. For example, Gulf County bed tax revenues were down five percent from the previous fiscal year 2008-2009 with reports that tourists avoided places like Destin and Pensacola and moved further east in the state to vacation (Dean, July 2010). Franklin County expected to see a 10 percent decline in tourism as a result of the oil spill. Manatee County's occupancy rates declined slightly for three straight months after the oil spill before rebounding (Adlerstein, June 2010; Gagliano, October 2010).
- ***Tourists were confused about the direct impacts to Florida beaches.*** Articles showed that among potential visitors there was a misperception about which beaches were directly impacted by oil. For example, a national survey of northern U.S. tourists showed that 20 percent of them believed Sarasota had been impacted by oil, another seven percent believed local beaches were severely impacted, and 13 percent were unsure of oil impacts, even though no oil came close to the coastline (Barron, 2010). One set of survey respondents incorrectly believed that there was oil on west Florida coast beaches from St. Petersburg to the Florida Keys (16%), in South Florida from Miami to Palm Beach (8%) and all the way up the east coast from Daytona to Amelia Island (5–6%) (Trigaux, 2010). One article attempted to capture the local frustration with such misperceptions stating that a "slick on Pensacola's beaches could curtail tourism as far away as Miami, because many overseas visitors will hear "Florida beaches hit with oil" and not make the distinction between particular locations" (Huettel and Albright, 2010).
- ***Misperceptions about the oil spill caused impacts outside of the Panhandle region.*** Newspaper articles discussed that Florida tourism suffered as a result of the spill, even if the oil plume was limited from Pensacola to Panama City. The adverse impact on Florida tourism resulted in claims relating to loss of income from hotels and restaurants throughout the state (AP-Huntsville Times, August 2011; Huettel, October 2010). For example, more than 100,000 entities in Florida made proximity claims, which are based on arguments of indirect harm (i.e., people's fear that oil was going to hit Florida that made them cancel vacation plans) (Segal, 2010).
- ***Tourists shifted their destinations to areas without oil***. Newspaper articles wrote about destination shifts among Florida visitors. For example, Florida saw a shift of vacationers to east coast beach destinations, and, while hotel occupancy in July 2010 was down or flat from a year earlier in four of five Florida west coast destinations, eight markets on Florida's east coast were all up, most by double-digit percentages (Williams, 2010; Huettle, September 2010). At the county level, Collier County tourism was up three percent in July, August, and September, compared with 2009 in terms its number of visitors, Levy County collected its estimated bed tax revenue, and Manatee County saw an 11 percent boost in visitors from the Southeast from January to September (Farrell, 2010; Jones, 2010; Gagliano, 2010).

Recovery

- ***Tourist officials' main job was to convey that Florida beaches were clean.*** To counter the confusion about which parts of Florida were directly impacted by oil, Visit Florida, the state's quasi-public tourism agency, launched major television and online advertising to reassure tourists in southeastern US markets that the beaches were clean. Articles also conveyed that many county tourism officials used web cams and social media to provide up-to-the minute information on actual coast conditions. For example, in Pinellas County, people could see local beach conditions in real time through web cams. Hotels offered "Book with Confidence," which promised visitors that their first night would be free if they found any signs of oil on the county's beaches (Porter, 2010; Lane, July 2010). Using Facebook, Twitter, and the Citrus County tourism's website, the tourism office offered constant updates for potential visitors (Wright, 2010). St. Pete Beach put web cameras on the beach to show that people are on the beaches (Citrus City Chronicle, 2010).

- ***Affected counties joined forces to address tourism losses.*** Tourism officials in Gulf County, Escambia, Santa Rosa, Okaloosa, Walton, Bay, and Franklin counties formed the North Florida Tourism Development Council (TDC) coalition and confronted BP after tourism in those counties had dropped for the early summer season of 2010 due to concern among tourists that the oil would reach the coastline of these counties (Dean, September 2010). The BP funds allowed the seven area tourism bureaus to try promotions they could not have otherwise afforded, and it propelled the Panhandle's visitor counts to record numbers in 2011. The BP funds were more than triple the tourism promotion funds typically spent by officials in Okaloosa County. The funding doubled the regular $750,000 budget for tourism officials in Franklin County and the normal $3 million budget in Bay County (Schneider and Nelson, 2011).

- ***Tourism bounced back by fall 2010 with record-breaking seasons.*** Numerous articles reported the return of the tourism industry after the spill, and some attributed the industry success to BP funding. For example, BP provided three-year grants to promote tourism; half the money was used for traditional marketing activities, such as national and regional print media, TV and Internet marketing, and the next largest portion of funds was earmarked for cooperative activities with lodging partners, in hopes of stabilizing the market and encouraging repeat business (Adlerstein, 2011). Florida tourism industry experienced modest growth in 2011, and experts attributed some of the growth to reparations made by BP and to the fact that tropical storms and hurricanes stayed away. Some examples of the tourism recovery noted in articles are provided below:
  - Statewide, the number of visitors rose seven percent from April through June 2011 compared to the same period in 2010 (Mcquaid, August 2011).
  - Tourism in Escambia County set lodging revenue records in both June and July 2011. Every month but November saw double-digit increases, compared to 2010 revenues, and every month but April topped revenue increases in other northwest Florida counties in those same months. The county attributed the increase to its

tourism budget being about three times its normal size (Gulf Breeze, September 2011).

- Walton County collected $2.8 million in bed taxes, a 24.8 percent increase from June 2010, and set a new record. Bed tax collections were up 32.33 percent in Okaloosa County and 38.33 percent in Santa Rosa County compared to June 2010. (Ricketts, August 2011). July bed tax numbers for Panama City were the highest on record, at $2.96 million, was about 25 percent higher than the previous record set in 2007 (Helgoth, 2011).
- In 2010, Pinellas County's mainstay tourism industry appears to have weathered travel issues created by the economy, the DWH oil spill, and volcanic ash impact on European air travel and was poised to gain two percent more visitors in 2011 (Jackovics, 2011).
- Lee County collected an extra $3 million in tax revenue 2010 through 2011, less than revenues in 2009–2010, but more than expected. Reasons why the county drew more tax dollars 2010–2011 included: less worry about the oil spill, the devalued US dollar was attractive to foreign visitors, and successful summer programs like the North American Roller Hockey Championships (Gillis, 2011).

Louisiana

Before the DWH spill

No information was available to summarize.

Oil Spill Impacts

- ***Studies show that the oil spill deterred tourists from visiting Louisiana.*** Articles made clear tourism's importance to Louisiana's economy. For example, in 2008, tourists spent $78 million in Lafourche Parish and $115 million in Terrebonne Parish on area festivals, swamp tours, and fishing trips, among other attractions. One study showed saltwater anglers, alone, spent $258.7 million on the sport in 2001, and the industry generated $527.7 million for Louisiana businesses (Schmidt, February 27, 2011). Articles reported that the oil spill negatively impacted the tourism and recreation industry in the state, and highlighted, for example, that seventeen percent of potential regional tourists indicated they had canceled or delayed a trip to Louisiana because of the oil spill. A May 2010 national survey indicated that 79 percent of the possible tourists believed that the oil spill problems would linger for at least two years (E. Anderson, July 2010). BBVA Compass projected that the oil spill could cause Louisiana to lose $880 million in tourism spending, including $37 million in spending related to recreational fishing[15] (Williams, May 2010). Another

[15] The article does not specify the timeframe over which these losses are estimated.

study projected that the state would lose almost $300 million in tourism spending through 2013 as a result of the disaster (Anderson, 2011).

- ***BP workers and contractors crowded out tourists for lodging.*** Articles noted that though Alabama, Florida, and Mississippi had ample space to house workers in under-booked beachfront hotels and condos, it was more challenging to find accommodations in the fishing villages and oil industry outposts dotting Louisiana's coastline (Rioux, 2010). For example, spill response headquarters and crews stayed in Terrebonne Parish, and this led to misleading estimations of tourism levels through traditional means, such as counting hotel vacancies. One article noted that it was difficult for non-contractors to get Louisiana-area hotel rooms because of the number of BP contractors, and, in smaller vacation locales, like Grand Isle, BP's cleanup crews' long-term stays made it difficult for tourists to find accommodations (Reckdahl, 2010; Buskey, September 2010).
- ***Businesses dependent on recreational fishermen and nature-based tourissm were hit hard.*** Many articles referred to the impacts of the spill on recreational fishing and other nature-based tourism. For example, all offshore fishing in Lafourche, Terrebonne, and Jefferson Parishes and inshore fishing around Grand Isle and southern Lafourche Parish was closed or off limits because of the spill. The oil spill led to the cancelation of many popular fishing rodeos, including the Grand Isle International Tarpon Rodeo and the Golden Meadow–Fourchon International Tarpon Rodeo because of fishing closures and logistical problems stemming from the spill (St. Germain, June 2011; Reid, 2010). Nature-based tourism businesses, such as swamp tour operators and charter fishermen, were also hard hit (Buskey, December 2010). Tourism operators outside the city of New Orleans that rely heavily on the marshlands were beginning to show signs of strain, and tour operators reported that most of the company's captains were out working to clean up the spill, decreasing the availability of boats and staff (Albright, June 2010).

Recovery

- ***For New Orleans, recovery efforts occurred within the context of Hurricane Katrina as BP funds boosted tourism profits.*** New Orleans' hospitality industry was viewed as still recovering from Hurricane Katrina when it faced the impacts of the DWH incident (Albright, June 2010). Fortunately, the local hospitality industry was largely unscathed by the spill, and the city of New Orleans and neighboring parishes experienced an economic boom in the wake of the spill, due, in part, to their ability to attract tourists who wanted to avoid beaches that had received oil (Foster, December 17, 2011; White, June 19, 2011). Hotel occupancy and sales tax revenues increased in the New Orleans area, and local tourism officials attributed BP for providing promotional dollars used to help increase tourism revenues (White, June 19, 2011).
- ***2011 tourism predictions were positive for most areas.*** In April 2011, survey results released by the Lieutenant Governor's office indicated that regional tourists from Texas to Florida were more open (42%) to visiting Louisiana in the wake of the oil spill than were tourists from elsewhere (18%) (Anderson, April 2011). St. Germain (2011) reported inshore fishing rebounded with the return of fishing rodeos, which

bring in millions of tourist dollars. The first weekend of the summer of 2011 was vastly improved in terms of tourism activity from the previous year, but the activity was still not up to pre-Katrina levels (Schmidt, June 2011). A state survey estimated that Louisiana would not regain its pre-spill tourism numbers until the first three months of 2013 (Schmidt, February 2011). However, the 2011 summer was the worst of any of the Terrebonne charter fishing captains could remember, as far as the number of customers booking fishing trips. This wasn't because the fishing was bad, but because of the belief that the Gulf was poisoned and the fish were toxic to eat (Seeber, 2011).

Mississippi

Before the DWH spill

No information was available to summarize.

Oil Spill Impacts

- ***Non-beach tourism activities were given greater promotion after the spill.*** Mississippi Lieutenant Governor Phil Bryant indicated that the state of Mississippi receives \$6 for every dollar spent by the tourism industry on promotion and projects (Havens, May 2010). To help encourage tourism after the oil spill, BP provided Mississippi \$15 million to promote tourism for three coastal counties, with \$4 million spent in major Southeastern markets to convey the message that the Mississippi Coast was "Open for Business" (Ward, 2010). Jackson County Chamber of Commerce directed its natural resource activities tourism campaign towards both local and tourist audiences (Dumas, 2010). Harrison County Tourism Commission focused on promoting its non-beach attractions, with casino revenues reportedly higher in 2010 compared to previous years (AP-Beaumont, May 13, 2010; Gray, 2010).
- ***Lodging rates were reduced after the oil spill.*** The Mississippi Hotel and Lodging Association indicated that initial reports of increased occupancy in 2010 were due to spill cleanup workers, and that the occupancy rates had decreased as the summer progressed (AP-The Times-Picayune, May 2011). Hotels offered lowered rates and incentives, such as \$75 gas cards, to attract guests within the region (Mohr, 2010). Mississippi's Gulf Coast hotel and motel room occupancy was down almost 12 percent in the first nine months of 2011 compared with the same period in 2010. Although it was a 6 percent increase over 2010, the revenue was less than that generated in 2008 (Nelson, 2011).

- ***Oil spill impacts were noted less frequently in Mississippi newspapers than in other states.*** Although there were fewer oil spill impacts noted for Mississippi than other study states, overarching impacts to the coastal counties included (in addition to the hotel impacts above): the tourism industry experiencing a 40 percent decline following the April 20 oil spill (Kirgan, July 2010); saltwater license sales down 43 percent compared to the same period in 2010 (Dute, 2010); no one on the beaches or eating seafood (Hoffman, 2010); and the closure of small businesses, such as a boat dealership (Wilkinson, 2010).

Texas

Before the DWH Oil Spill

- ***2010 was predicted to be a better year for tourism than 2009.*** Before the oil spill, Galveston County tourism had been down because of the national recession and lingering impacts of Hurricane Ike in 2009 (Meyers, May 30 2010). However, affordable gasoline and airfares, the improving economy, and people ready to finally take vacations, led experts to predict a three percent increase in travel for Texas in 2010.

Oil Spill Impacts

- ***Seafood restaurants were impacted by fears of contamination.*** Texas restaurants reported increased seafood prices after the oil spill, which they felt could not be fully passed on to consumers (Elder, 2010). They also reported an avoidance of seafood consumption due to fears of contamination (Rice and Patel, 2010).

Recovery

- ***Texas made efforts to attract tourists from other Gulf areas to oil-free Texas beaches.*** Because Texas, particularly Galveston, received lesser physical impacts from oil on its beaches, they tried to attract visitors to the area on the premise that they had not been impacted by the spill (Kappes, 2010). Tourism officials tended to target regional tourists (e.g., outreach to in-state and market areas that tend to go to New Orleans), and anecdotes in articles indicated that the hotels felt they were attracting tourists who typically vacationed in Alabama, Florida, and Louisiana (Kappes, 2010; Elder and Meyers, 2010). Galveston hotel revenues in 2010 were 28 percent higher than in 2009, and tourism remained steady, with an 85 percent occupancy rate, even after a small number of tar balls reached Galveston in July of that year (Kappes, 2010).

4.0 ESTIMATING THE IMPACTS OF THE *DEEPWATER HORIZON* OIL SPILL ON GULF TOURISM

This section estimates the impact of the DWH oil spill on tourism in the Gulf region, based on data from the US Department of Labor, Bureau of Labor Statistics (BLS) Quarterly Census of Employment and Wages (QCEW). The section begins by describing the QCEW data and the method used to analyze it, and then presents findings from the analysis for each state in the Gulf region.

4.1 SUMMARY OF DATA AND METHODS

4.1.1 MEASURING TRAVEL AND TOURISM

In a separate report, ERG developed three measures of travel, tourism, and recreation and also developed data for use in calculating the three measures (ERG, 2014). The three measures that we developed in that report were:

- **Travel and Tourism (TT)**: the economic activity of sectors associated with visitors who travel to an area.
- **Recreation (RE)**: the economic activity for sectors that supply recreation activities. Recreation is defined as something a person does to relax, have fun, or for enjoyment. Both visitors and residents can use a location's assets, goods, and services for recreation.
- **Travel and Tourism Sensitive to OCS Operations (TTOCS)**: the economic activity for travel and tourism (TT) sectors that depend on (are sensitive to) coastal resources.

The analyses in this report will focus on the TT measure because that measure most closely aligns with the questions meant to be addressed in this report.

ERG (2014) details how each measure was calculated. In summary, the process involved:

- ***Mapping sectors of the economy and NAICS codes to each measure.*** This in-depth process involved reviewing BEA and BLS data to develop an initial set of NAICS codes for inclusion. We then compared the initial set to similar measures used by the US Travel Association and NOAA. This resulted in a final set of NAICS codes we used for each measure. **Table 12** provides the set of NAICS codes we use in the TT measure.
- ***Identifying a Tourism Commodity Ratio (TCR) for each NAICS code.*** A TCR is a percentage that we use to adjust the data for each measure to reflect the proportion of that is consumed by tourists and visitors. For example, not all patrons at restaurants are visitors to an area. A TCR adjusts the data for the

sectors to determine the percentage attributable to visitors. The TCRs used in this report are summarized in **Table 12**.

The data for calculating these measures comes from three main sources:

- **BLS' Quarterly Census of Employment and Wages (QCEW).** QCEW provides quarterly and annual data on employment, payroll, and the number of establishments. QCEW data are a near census of employees covered by State unemployment insurance and Federal workers covered by the Unemployment Compensation for Federal Employees (UCFE) program.

- **Census' Nonemployer Statistics.** The nonemployer data provide annual data on the number of establishments that have neither paid employment nor payroll. These establishments are excluded from QCEW.

- **Data on public assets.** ERG also included data on employment, payroll, and number of establishments for national and state parks in coastal areas in the Gulf. Data were collected for 2009.

In ERG (2014), we used data only for 2009. This report, on the other hand, uses quarterly data from the second quarter of 2009 through the fourth quarter of 2011. This time frame allows for looking at changes in tourism and travel after the DWH spill. However, because we use quarterly data, *we included only the QCEW data in our analyses for this report.*

Table 12

Industries in BOEM TT, RE, and TTOCS Measures

NAICS 6-Digit Code	Description	TT[a]
441210	Recreational Vehicle Dealers	
441221	Motorcycle, ATV, and Personal Watercraft Dealers	
441222	Boat Dealers	
445110	Supermarkets and Other Grocery (except Convenience) Stores	3%
445120	Convenience Stores	3%
445210	Meat Markets	3%
445220	Fish and Seafood Markets	3%
445230	Fruit and Vegetable Markets	3%
445291	Baked Goods Stores	3%
445292	Confectionary and Nut Stores	3%
445299	All Other Specialty Food Stores	3%
445310	Beer, Wine and Liquor Stores	3%
447110	Gasoline Stations with Convenience Stores	16%
447190	Other Gasoline Stores	16%
452111	Department Stores (except Discount Department Stores)	3%
452112	Discount Department Stores	3%
452910	Warehouse Clubs and Supercenters	3%
452990	All Other General Merchandise Stores	3%
481111	Scheduled Passenger Air Transportation	100%
481211	Nonscheduled Chartered Passenger Air Transportation	100%

NAICS 6-Digit Code	Description	TT[a]
481219	Other Nonscheduled Air Transportation	100%
485111	Mixed Mode Transit Systems	16%
485112	Commuter Rail Systems	16%
485113	Bus and Other Motor Vehicle Transit Systems	16%
485119	Other Urban Transit Systems	16%
485210	Interurban and Rural Bus Transportation	100%
485310	Taxi Service	34%
485320	Limousine Service	16%
485510	Charter Bus Industry	100%
485999	All Other Transit and Ground Passenger Transportation	16%
487110	Scenic and Sightseeing Transportation, Land	100%
487210	Scenic and Sightseeing Transportation, Water	100%
487990	Scenic and Sightseeing Transportation, Other	100%
532111	Passenger Car Rental	91%
532120	Truck, Utility Trailer, and RV (Recreational Vehicle) Rental and Leasing	94%
532292	Recreation Goods Rental	27%
561510	Travel Agencies	95%
561520	Tour Operations	95%
561591	Convention and Visitors Bureaus	95%
561599	All Other Travel Arrangement and Reservation Services	95%
611620	Sports and Recreation Instruction	27%
711110	Theater Companies and Dinner Theaters	30%
711120	Dance Companies	30%
711130	Musical Groups and Artists	30%
711190	Other Performing Arts Companies	30%
711211	Sports Teams and Clubs	35%
711212	Racetracks	35%
711219	Other Spectator Sports	35%
711510	Independent Artists, Writers, and Performers	30%
712110	Museums	26%
712120	Historical Sites	26%
712130	Zoos and Botanical Gardens	26%
712190	Nature Parks and Other Similar Institutions	26%
713110	Amusement and Theme Parks	26%
713120	Amusement Arcades	26%
713210	Casinos (except Casino Hotels)	51%
713290	Other Gambling Industries	51%
713910	Golf Courses and Country Clubs	27%
713920	Skiing Facilities	27%
713930	Marinas	27%
713940	Fitness and Recreational Sports Centers	27%
713950	Bowling Centers	27%
713990	All Other Amusement and Recreation Industries	27%
721110	Hotels (except Casino Hotels) and Motels	100%
721120	Casino Hotels	100%
721191	Bed-and-Breakfast Inns	100%
721199	All Other Traveler Accommodation	100%
721211	RV (Recreational Vehicle) Parks and Campgrounds	100%
721214	Recreational and Vacation Camps (except Campgrounds)	100%
722110	Full-Service Restaurants	18%
722211	Limited-Service Restaurants	18%
722212	Cafeterias, Grill Buffets, and Buffets	18%

NAICS 6-Digit Code	Description	TT[a]
722213	Snack and Nonalcoholic Beverage Bars	18%
722330	Mobile Food Services	18%
722410	Drinking Places (Alcoholic Beverages)	18%
811111	General Automotive Repair	9%
812930	Parking Lots and Garages	16%

4.1.2 Estimating Percent Changes in Tourism (Impacts)

To estimate the change in tourism that might be associated with the DWH oil spill, quarterly tourism parameters (payroll, employment, and establishments) were calculated, using the TT measure, for each county in the study states. We then calculated the percentage changes between the same quarters[16] over one- and two-year time frames. The spill occurred on April 20, 2010 (early in the second quarter of 2010). We calculated seven percentage changes:

<u>One-year impacts</u>

Between 2010q2[17] and 2009q2
Between 2010q3 and 2009q3
Between 2010q4 and 2009q4
Between 2011q1 and 2010q1

<u>Two-year impacts</u>

Between 2011q2 and 2009q2
Between 2011q3 and 2009q3
Between 2011q4 and 2009q4

Timelines depicting these percentage change calculations are shown in **Figure 4**. In the Results section, we provide estimates for the percentage changes listed above for each county in each state in the Gulf region. We also focus our discussion on which counties and parishes had significant reductions in tourism-related economic activity.

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[16] That is, we compared first quarters to first quarters and second quarters to second quarters, etc., to ensure that we accounted for seasonality of tourism.
[17] The first four characters in this notation represent the year and the final two represent the quarter. Thus 2010q2 should be read as second quarter (q2) of 2010.

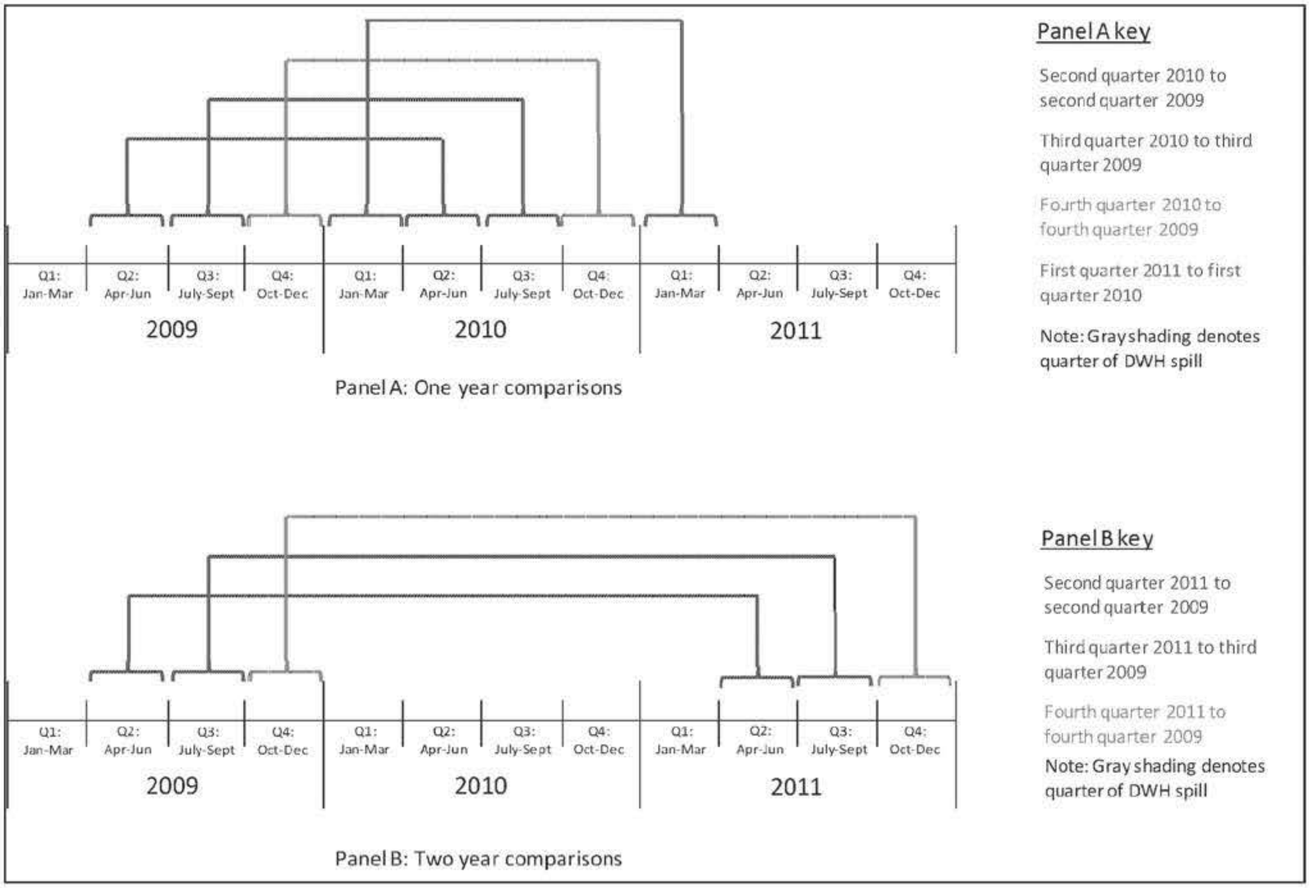

Figure 4: Timeline Showing Percentage Change Calculations

4.2 RESULTS

The results of the analysis to estimate the change in tourism employment are presented in **Table 13** through **Table 17**. Each table includes county- and parish-level quarterly tourism employment data and the percentage change in tourism employment between same quarters from 2009q2-2011q4 (as described in Section 4.1.2 above). Additional quarterly tourism parameters (payroll and establishments) are presented in the county and parish profiles included in Appendix B.

Alabama (Table 13)

A comparison of tourism employment in Alabama counties before and after the spill does not show a large shift in tourism employment; employment numbers either hold steady or slightly increase up to three percent. A comparison of Baldwin County quarters in 2009 to 2011 showed employment increases ranging from nine percent to 14 percent; Mobile County ranged from a two percent decrease in tourism employment in q2 to an increase of two percent in q4.

Florida (Table 14)

Florida counties saw a fairly wide range of impacts to tourism employment in the quarters surrounding the spill (from -93% to +120%); however, the large percentage losses are associated with counties with a small the tourism sector. When focusing on the counties with tourism sectors of at least 1,000 employees (in 2009q2), we see changes in employment ranging from a 3.9 percent loss (Bay) to a 7.3 percent gain (Escambia) between 2009q2 and 2010q2. For the most part, counties with more than 1,000 employees in 2009q2 saw either increasing tourism employment over the time period or rebounds in tourism employment after an initial decline. Two exceptions to this were Sarasota and Hernando counties, where tourism employment remained at levels lower than pre-spill levels into 2011.

Louisiana (Table 15)

Louisiana parishes with more than 1,000 tourism employees in 2009q2 saw either no change or slight increases between 2009q2 and 2010q2 (quarter of the spill). However, in quarters after the spill, Calcasieu, Lafayette, and Terrebonne parishes saw tourism employment declines relative to pre-spill level. On the other hand, St. Tammany, Orleans, and Jefferson parishes saw increasing tourism employment after the spill.

Mississippi (Table 16)

Of the three Mississippi study counties, Hancock County appears to have had the largest negative percentage change in employment in the quarters after the spill. Jackson County maintained no or positive employment change after the spill; Harrison County had two quarters after the spill during which there were negative percentage changes in employment (spanning -2% to 1%). In contrast, Hancock County saw negative percentage changes in tourism employment of 7.7 percent after the spill.

Texas (Table 17)

Harris County, containing Houston, is by far the largest tourism employer among Texas counties. It saw increases in tourism employment following the spill. Cameron County also saw increasing tourism employment over the time period, compared to pre-spill levels. Victoria and Galveston counties saw initial declines in tourism employment followed by rebounding levels in 2011. As discussed in Section 5.4.2, during our field work we learned that some Texas counties actively marketed themselves as alternatives to Louisiana and Florida. In contrast to the increases seen in most of Texas, Jefferson County saw a continuous decline in tourism employment over the study period.

Discussion

For the most part, counties with more than 1,000 tourism employees in 2009q2 experienced either only initial (temporary) declines in tourism-related employment or no initial declines in employment followed by growth. Figure 5 shows this for the counties with the largest tourism employment in each state. It also shows the percentage change from the same quarter in the year before the spill (i.e., the "percentage change between same quarters, one-year and two-year impacts" from Tables 13 to 17). Harrison (Mississippi) and Hillsborough (Florida) both saw an initial decline followed by growth in tourism-related employment following the spill. In contrast, Harris County (Texas) and Orleans Parish (Louisiana) both saw initial and subsequent growth in tourism-related employment following the spill. Mobile County (Alabama) saw no change in tourism-related employment following the spill.

However, two counties with more than 1,000 tourism employees in 2009q2 did see declining tourism-related employment following the spill:

- *Hancock County (Mississippi)* saw a 7.7 percent decline in tourism employment in the second and third quarters of 2010 compared to the same quarters in 2009. The impacts beyond third quarter 2010 could not be reliably estimated due to data disclosure issues among hotels and restaurants over the time period (see note to **Table 16**). For the second and third quarters in 2010, the losses in Hancock County were among hotels (NAICS 721), restaurants (NAICS 722), and arts, entertainment, and recreation establishments (NAICS 71).

- *Sarasota County (Florida)* saw declines in tourism-related employment for the three quarters after the spill and then again in second quarter of 2011. These employment losses were concentrated among arts, entertainment, and recreation establishments (NAICS 71) and hotels (NAICS 721).

Table 13

Levels of and Same Quarter Changes in Travel and Tourism (TT) Employment in Alabama and its Counties Following the Deepwater Horizon Oil Spill, Second Quarter 2009 to Fourth Quarter 2011

Alabama Counties	Levels of Employment (thousands of employees)											Percentage Change Between Same Quarters						
													One-Year Impacts			Two-Year Impacts		
	2009			2010				2011				2010:2 to 2009:2	2010:3 to 2009:3	2010:4 to 2009:4	2011:1 to 2010:1	2011:2 to 2009:2	2011:3 to 2009:3	2011:4 to 2009:4
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4							
Baldwin	3.7	3.7	3.3	3.2	3.9	3.8	3.4	3.5	4.2	4.2	3.6	5.4	2.7	3.0	9.4	13.5	13.5	9.1
Mobile	5.6	5.5	5.3	5.3	5.6	5.5	5.3	5.3	5.5	5.5	5.4	0.0	0.0	0.0	0.0	-1.8	0.0	1.9

Note: Columns that are boxed in represent the quarter in which the DWH spill occurred (second quarter 2010).

Table 14

Levels of and Same Quarter Changes in Travel and Tourism (TT) Employment in Florida and its Counties Following the Deepwater Horizon Oil Spill, Second Quarter 2009 to Fourth Quarter 2011

Florida Counties	Levels of Employment (thousands of employees)											Percentage Change Between Same Quarters						
												One-Year Impacts				Two-Year Impacts		
	2009			2010				2011				2010:2 to 2009:2	2010:3 to 2009:3	2010:4 to 2009:4	2011:1 to 2010:1	2011:2 to 2009:2	2011:3 to 2009:3	2011:4 to 2009:4
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4							
Bay	5.1	4.9	4.0	4.2	4.9	4.8	4.2	4.6	5.5	5.5	4.5	-3.9	-2.0	5.0	9.5	7.8	12.2	12.5
Charlotte	1.7	1.6	1.7	1.8	1.8	1.6	1.6	1.8	1.8	1.6	1.7	5.9	0.0	-5.9	0.0	5.9	0.0	0.0
Citrus	1.1	1.1	1.0	1.1	1.1	1.1	1.1	1.0	1.1	1.0	1.0	0.0	0.0	10.0	-9.1	0.0	-9.1	0.0
Collier	8.7	7.4	8.2	8.9	8.6	7.8	8.5	9.3	8.8	8.2	9.0	-1.1	5.4	3.7	4.5	1.1	10.8	9.8
Dixie	0.08	0.08	0.07	0.05	0.04	0.01	0.01	0.02	0.01	0.02	0.01	-46.2	-88.0	-86.3	-67.4	-92.3	-80.0	-93.2
Escambia	4.1	4.2	4.0	4.2	4.4	4.4	4.1	4.2	4.8	4.8	4.5	7.3	4.8	2.5	7.3	0.0	17.1	14.3
Franklin	0.3	0.3	0.2	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	-3.7	7.7	8.7	4.0	7.4	7.7	8.7
Gulf	0.2	0.2	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	-54.4	-61.1	-51.4	-9.7	-60.0	-63.3	-62.1
Hernando	1.4	1.3	1.3	1.3	1.4	1.3	1.4	1.3	1.3	1.2	1.3	-2.9	0.8	3.8	-3.0	-7.1	-6.9	-3.8
Hillsborough	19.6	19.0	19.1	18.8	19.4	19.2	19.0	20.1	20.5	20.2	20.3	-1.0	1.1	-0.5	6.9	4.6	6.3	6.3
Jefferson	0.04	0.04	0.04	0.04	0.04	0.01	0.01	0.04	0.09	0.08	0.01	8.1	-65.7	-63.9	11.1	129.7	120.0	-69.4
Lee	10.9	10.0	5.3	10.1	10.5	10.3	9.5	10.9	10.9	10.1	10.3	-3.7	3.0	79.2	7.9	0.0	1.0	94.3
Levy	0.3	0.2	0.2	0.3	0.3	0.2	0.2	0.3	0.3	0.2	0.3	-8.9	-0.8	-5.3	1.2	-8.2	0.8	8.9
Manatee	3.7	3.3	3.5	3.8	3.8	3.6	3.6	3.8	3.8	3.7	3.9	2.7	9.1	2.9	0.0	2.7	12.1	11.4
Monroe	6.3	5.9	6.1	6.6	6.8	6.4	6.6	7.1	7.1	6.8	7.0	7.9	8.5	8.2	7.6	12.7	15.3	14.8
Okaloosa	3.6	3.6	3.0	3.3	3.9	3.7	3.0	3.1	4.0	3.8	3.3	8.3	2.8	0.0	-6.1	11.1	5.6	10.0
Pasco	3.6	3.4	3.3	3.5	3.6	3.4	3.5	3.7	3.6	3.5	3.6	0.0	0.0	6.1	5.7	0.0	2.9	9.1
Pinellas	17.2	16.1	15.8	16.1	16.9	16.3	16.0	16.4	17.0	16.8	16.5	-1.7	1.2	1.3	1.9	-1.2	4.3	4.4
Santa Rosa	1.2	1.2	1.1	1.1	1.2	1.2	1.2	1.2	1.4	1.4	1.3	0.0	0.0	9.1	9.1	16.7	16.7	18.2
Sarasota	6.7	6.3	6.5	6.6	6.5	6.1	6.2	6.7	6.5	6.3	6.5	-3.0	-3.2	-4.6	1.5	-3.0	0.0	0.0
Taylor	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	22.8	18.7	16.7	-2.5	17.2	16.5	18.4
Wakulla	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.02	0.03	0.03	0.03	-6.3	0.0	0.0	-17.9	6.3	10.0	0.0
Walton	2.3	2.3	1.8	1.9	2.3	2.2	1.8	2.0	2.6	2.6	2.1	0.0	-4.3	0.0	5.3	13.0	13.0	16.7
Washington	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	3.8	-9.6	-5.1	3.8	-6.5	9.0	0.0

Note: Columns that are boxed in represent the quarter in which the DWH spill occurred (second quarter 2010).

Table 15

Levels of and Same Quarter Changes in Travel and Tourism (TT) Employment in Louisiana and its Parishes Following the Deepwater Horizon Oil Spill, Second Quarter 2009 to Fourth Quarter 2011

Louisiana Parishes	Levels of Employment (thousands of employees)											Percentage Change Between Same Quarters						
												One-Year Impacts				Two-Year Impacts		
	2009			2010				2011				2010:2 to 2009:2	2010:3 to 2009:3	2010:4 to 2009:4	2011:1 to 2010:1	2011:2 to 2009:2	2011:3 to 2009:3	2011:4 to 2009:4
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4							
Calcasieu	5.9	6.0	5.9	5.8	5.9	5.8	5.7	5.6	5.7	5.8	5.6	0.0	-3.3	-3.4	-3.4	-3.4	-3.3	-5.1
Cameron	0.08	0.08	[a]	0.08	0.08	0.08	0.08	0.07	0.05	0.05	0.05	-4.8	-6.0	[a]	-12.3	-34.9	-34.9	[a]
Iberia	0.6	0.6	0.6	0.5	0.5	0.5	0.5	0.5	0.5	0.6	0.5	-4.6	-5.1	-6.4	-4.6	-2.5	-5.4	0.9
Jefferson	7.0	7.0	7.0	6.9	7.3	7.2	7.1	7.1	7.1	7.3	6.7	4.3	2.9	1.4	2.9	2.0	4.3	-4.3
Lafayette	4.2	4.1	4.0	4.0	4.2	4.1	4.0	3.9	4.0	4.1	4.0	0.0	0.0	0.0	-2.5	-4.8	0.0	0.0
Lafourche	0.8	0.8	0.8	0.8	0.8	0.9	0.8	0.8	0.8	0.9	0.9	0.2	2.0	3.8	0.2	2.1	1.9	4.1
Orleans	15.9	15.4	16.0	16.1	16.3	16.3	16.8	17.1	17.0	17.2	17.7	2.5	5.8	5.0	6.2	6.9	11.7	10.6
Plaquemines	0.3	0.3	0.3	0.3	0.4	0.4	0.4	0.4	0.4	0.4	0.4	23.1	27.5	28.0	33.6	25.6	26.3	25.7
St. Bernard	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	11.7	13.6	30.2	4.5	20.0	16.9	39.6
St. Charles	0.3	0.3	0.3	0.3	0.3	0.4	0.3	0.3	0.4	0.4	0.4	14.4	5.6	7.1	11.6	19.4	13.0	11.6
St. John the Baptist	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	-1.3	-4.5	3.7	2.5	-1.1	-5.6	2.4
St. Mary	0.9	0.7	0.7	0.7	0.7	0.8	0.8	0.8	0.8	0.8	0.8	-15.8	5.4	5.5	9.9	-7.3	7.8	9.1
St. Tammany	2.6	2.7	2.5	2.5	2.7	2.7	2.6	2.6	2.9	2.9	2.7	3.8	0.0	4.0	4.0	11.5	7.4	8.0
Tangipahoa	1.2	1.3	1.2	1.2	1.2	1.3	1.2	1.2	1.3	1.3	1.3	0.0	0.0	0.0	0.0	8.3	0.0	8.3
Terrebonne	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.3	1.3	1.4	1.3	0.0	0.0	0.0	-7.1	-7.1	0.0	-7.1
Vermilion	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	-9.3	-7.1	1.4	-2.2	-8.0	-5.8	-0.3

Note: Columns that are boxed in represent the quarter in which the DWH spill occurred (second quarter 2010).
[a] Not reported due to data disclosure issues.

Table 16

Levels of and Same Quarter Changes in Travel and Tourism (TT) Employment in Mississippi and its Counties Following the Deepwater Horizon Oil Spill, Second Quarter 2009 to Fourth Quarter 2011

Mississippi Counties	Levels of Employment (thousands of employees)											Percentage Change Between Same Quarters							
												One-Year Impacts				Two-Year Impacts		
	2009			2010				2011										
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	2010:2 to 2009:2	2010:3 to 2009:3	2010:4 to 2009:4	2011:1 to 2010:1	2011:2 to 2009:2	2011:3 to 2009:3	2011:4 to 2009:4
Hancock	1.3	1.3	0.3 [a]	1.2	1.2	1.2	0.3 [a]	0.3 [a]	0.3 [a]	0.3 [a]	0.3 [a]	-7.7	-7.7	[a]	[a]	[a]	[a]	[a]
Harrison	11.8	11.7	11.3	11.1	11.6	11.7	11.2	11.2	11.8	11.9	11.5	-1.7	0.0	-0.9	0.9	0.0	1.7	1.8
Jackson	1.4	1.4	1.3	1.4	1.5	1.4	1.4	1.4	1.5	1.5	1.4	7.1	0.0	7.7	0.0	7.1	7.1	7.7

Note: Columns that are boxed in represent the quarter in which the DWH spill occurred (second quarter 2010).
[a] These values for employment and the associated percentage changes are associated with a data disclosure issue. The number of employees in the hotels sector (NAICS 721) and the restaurants sectors (NAICS 722) were non-disclosed for 2009q4, 2010q4, and all of 2011.

Table 17

Levels of and Same Quarter Changes in Travel and Tourism (TT) Employment in Texas and its Counties Following the Deepwater Horizon Oil Spill, Second Quarter 2009 to Fourth Quarter 2011

Texas Counties	Levels of Employment (thousands of employees)											Percentage Change Between Same Quarters						
												One-Year Impacts				Two-Year Impacts		
	2009			2010				2011				2010:2 to 2009:2	2010:3 to 2009:3	2010:4 to 2009:4	2011:1 to 2010:1	2011:2 to 2009:2	2011:3 to 2009:3	2011:4 to 2009:4
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4							
Aransas	0.5	0.5	0.4	0.4	0.5	0.5	0.5	0.4	0.4	0.5	0.4	4.6	5.4	9.6	-11.8	-2.6	1.3	-3.4
Brazoria	2.2	2.2	2.2	2.1	2.2	2.2	2.2	2.2	2.3	2.3	2.3	0.0	0.0	0.0	4.8	4.5	4.5	4.5
Calhoun	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2	-1.5	5.8	6.8	15.8	19.9	18.4	22.9
Cameron	4.0	4.0	3.7	3.9	4.1	4.2	3.8	3.9	4.3	4.3	4.0	2.5	5.0	2.7	0.0	7.5	7.5	8.1
Chambers	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	7.0	-12.7	-5.0	3.8	5.0	-7.7	-3.3
Galveston	4.8	5.0	4.6	4.4	4.9	4.9	4.5	4.5	5.1	5.1	4.7	2.1	-2.0	-2.2	2.3	6.3	2.0	2.2
Harris	59.7	58.6	57.2	56.2	61.2	61.1	57.8	59.0	61.1	60.9	60.6	2.5	4.3	1.0	5.0	2.3	3.9	5.9
Jefferson	3.1	3.1	3.1	3.0	3.0	2.9	3.0	2.9	3.0	2.9	2.9	-3.2	-6.5	-3.2	-3.3	-3.2	-6.5	-6.5
Jim Wells	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	-3.1	3.7	7.3	-3.1	11.4	7.5	11.8
Kenedy	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Kleberg	0.34	0.34	0.34	0.33	0.33	0.32	0.33	0.37	0.38	0.39	0.41	-1.8	-6.7	-0.6	10.5	13.0	13.1	21.1
Liberty	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4	-10.7	-8.5	-1.3	8.6	-2.7	0.9	5.5
Matagorda	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3	-0.9	1.0	-6.3	-7.9	-8.0	-4.3	-8.6
Nueces	5.8	5.8	5.3	5.2	5.8	5.8	5.4	5.3	5.7	5.7	5.6	0.0	0.0	1.9	1.9	-1.7	-1.7	5.7
Orange	0.7	0.7	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	0.6	-3.9	-2.6	-1.8	-2.3	-7.2	-7.0	-6.9
Refugio	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	-1.8	-3.6	-1.9	0.0	-3.6	-5.5	1.9
San Patricio	0.7	0.7	0.6	0.6	0.6	0.6	0.6	0.6	0.7	0.6	0.6	-6.6	-6.0	-2.5	2.0	2.8	-2.7	2.0
Victoria	1.0	1.0	0.9	0.9	1.0	0.9	0.9	0.9	1.0	1.0	0.9	-2.0	-2.6	-1.5	1.1	0.2	1.7	3.4
Willacy	0.10	0.10	0.10	0.09	0.09	0.09	0.05	0.10	0.06	0.10	0.05	-6.9	-8.3	-46.3	3.2	-45.5	1.0	-43.2

Note: Columns that are boxed in represent the quarter in which the DWH spill occurred (second quarter 2010).

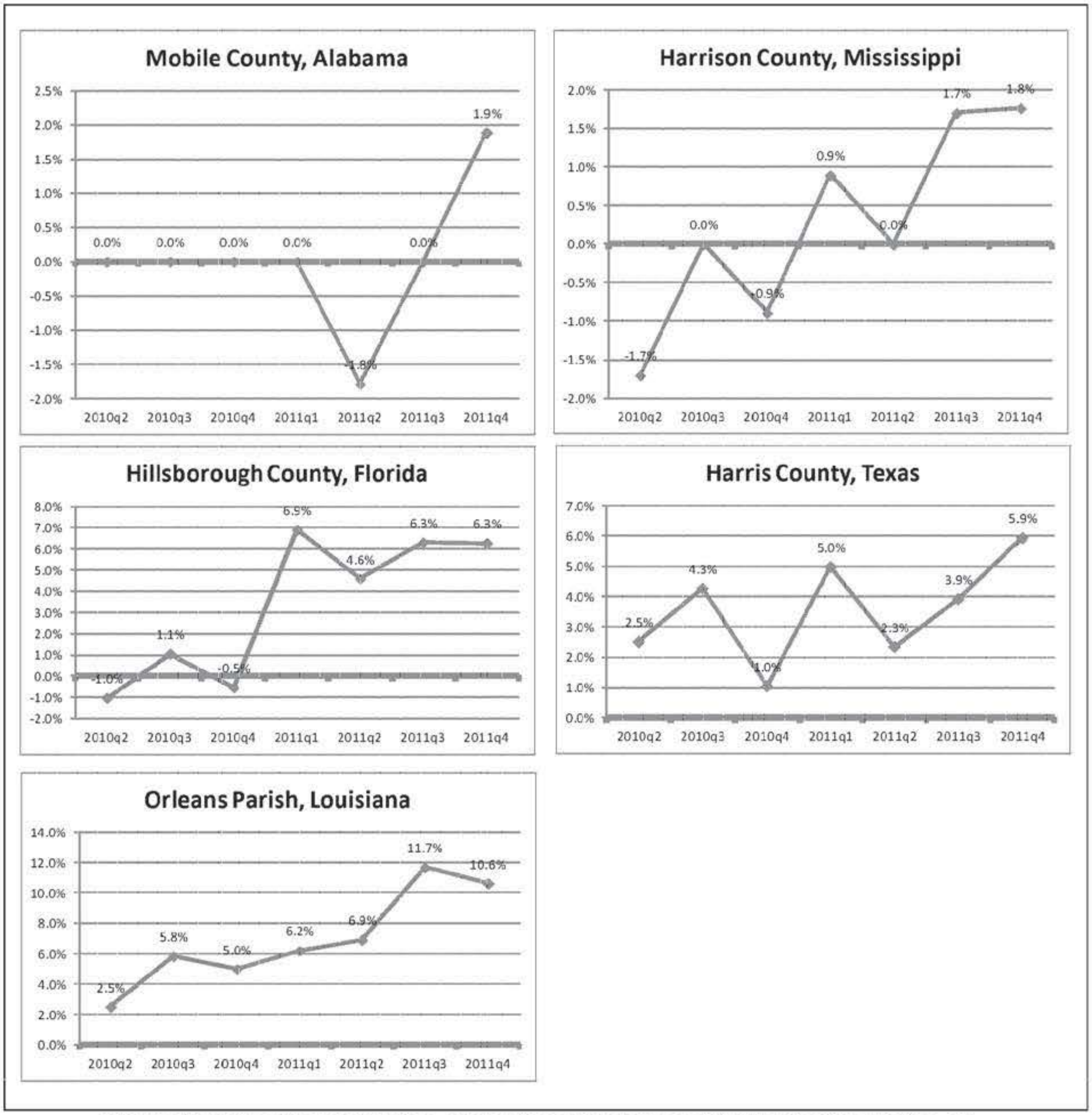

Figure 5: Percentage Changes in Tourism Employment for Largest Counties or Parishes in Each State, Second Quarter 2009 to Fourth Quarter 2011

5.0 PERSPECTIVES ON THE IMPACTS OF THE *DEEPWATER HORIZON* OIL SPILL ON GULF TOURISM FROM FIELD WORK IN THE GULF

To tell the story of how the DWH oil spill impacted and shaped local travel, tourism, and recreation economies in the Gulf of Mexico region, and to give perspective to the other work being performed for this project (i.e., the work described in the previous sections of this report), this section discusses the approach ERG took to conducting the field work (Section 5.1) and then discusses the results of the field work (Section 5.2).

5.1 FIELD PLAN

ERG developed a plan for implementing the interviews in the Gulf; this plan included considerations of:

- The geographic focus,
- Types of Interviewees,
- Interview questions and field guides, and
- A plan for implementing the interviews.

The following sections describe each of these aspects in more detail.

5.1.1 GEOGRAPHIC FOCUS

ERG identified seven focal areas that encompass the 64 counties and parishes in the study area (see Table 18). These areas were selected based on information collected and synthesized on the recreation and tourism industries in the Gulf's coastal zone under Section 3.0. The focal areas are divided by state and by whether the area's beaches and coastlines were physically impacted by oil.

ERG used the relative number of paid claims from the GCCF data in each of the Gulf States (Figure 6) to determine where to focus our interviews within each of the study areas. Specifically, Louisiana's and Florida's two focal areas were given specific emphasis because of the large numbers of claims in those states. In contrast, less emphasis was placed on Texas because fewer claims had been made relative to the other states. The South Coast Texas region (not depicted in Figure 6) had even lower emphasis compared to the Houston-Galveston area because there were fewer claims in the South Coast area.

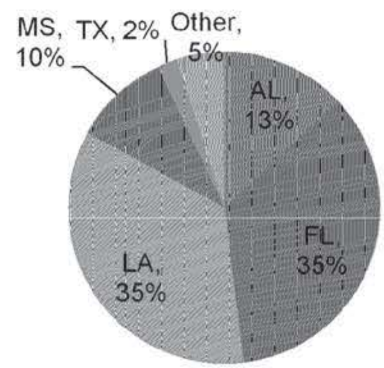

Figure 6: Number of GCCF Claims Paid by State. Source: GCCF, 2012

ERG also used the GCCF claims analysis to determine which industries within each of the geographical areas to interview. **Table 20** presents the industries, by state, most heavily impacted by the spill in terms of the largest number of paid GGCF claims.

Table 18

Geographic Focal Areas and Included Counties

Focal Area	Counties and Parishes Included		
South Coast Texas	• Aransas • Calhoun • Cameron • Jim Wells	• Kennedy • Kleberg • Nueces • Refugio	• San Patricio • Victoria • Willacy
Galveston/Houston Texas	• Brazoria • Chambers • Galveston • Harris	• Harris • Jefferson • Liberty	• Matagorda • Orange
Louisiana	• Calcasieu • Cameron • Iberia • Jefferson • La Fourche • Lafayette	• Orleans • Plaquemines • St. Bernard • St.Charles • St. John	• St. Mary • St. Tammany • Tangipahoa • Terrebonne • Vermilion
Mississippi	• Hancock	• Harrison	• Jackson
Alabama	• Mobile	• Baldwin	
Panhandle Florida	• Bay • Escambia • Franklin	• Gulf • Okaloosa • Santa Rosa	• Wakulla • Walton • Washington
West Coast Florida	• Citrus • Dixie • Jefferson • Levy • Taylor	• Charlotte • Collier • Hernando • Hillsborough • Lee	• Manatee • Monroe • Pasco • Pinellas • Sarasota

5.1.2 INTERVIEWEES

This section discusses the interviewees who were the focus of the field interviews. The section begins by discussing the populations of interest for the field work and then provides a framework for describing how the interviews were distributed across each of the geographic regions (identified above) and populations. ERG limited the number of interviewees to nine or fewer individuals for each grouping of interviewees that was asked a distinct set of questions in order to comply with the Paperwork Reduction Act.

ERG conducted interviews with the following types of organizations:

- ***Local and Regional Tourism Bureaus***. Officials from local and regional tourism bureaus were interviewed to provide perspective on the impacts and recovery efforts from the spill on local TTR. ERG also interviewed "Visit Florida," a quasi-state government program that assisted with the statewide response to the spill.
- ***Trade Associations.*** ERG conducted interviews with staff from trade organizations in order to provide some insight on member or industry impacts and their combined efforts (if any) to mitigate the oil spill impacts.

- ***Businesses.*** ERG interviewed businesses that represented the sectors that were found to be the most heavily impacted in the GCCF claims analysis (See Section 2.3.1).
- ***Regional Alliances.*** ERG conducted an interview with the Gulf Coast Alliance, which is comprised of Chambers of Commerce and other business support organizations in coastal Alabama, Florida, Louisiana, and Mississippi. The regional Alliance formed after the DWH spill to respond to business concerns and promote economic resilience in the Gulf region. **Table 19** provides a framework for the field interview targets based on the interview categories described above and the geographic areas identified in Section 5.1.1.

A list of the organizations we interviewed is in Appendix D.

Table 19

Target Selection for Field Interviews

Geographic Area	Interview Targets [a]			
	Tourism Bureaus	**Trade Associations**	**Businesses[b]**	**Regional Alliances[c]**
South Coast Texas	• Local/regional			
Houston/ Galveston Texas	• Local/regional	• Boating Trades Assoc.	• Boat dealer	
Louisiana	• Local/regional (2)	• New Orleans Restaurant Assoc.	• Lodging • Tour operator • Charter boat operator • Marina owner	Gulf Coast Alliance
Mississippi	• Local/regional	• MS Lodging Assoc. • MS Casino Operators Assoc.		
Alabama	• Local/regional	• Charter boat Operator Assoc.	• Seafood restaurant	
Panhandle Florida	• Visit Florida • Local/regional	• Municipal Marinas Assoc.	• Lodging • Seafood restaurant	
West Coast Florida	• Visit Florida • Local/regional	• Municipal Marinas Assoc.	• Charter Fishing	
Total Interviews	**9**	**6**	**9**	**2**

[a]Each interview target listed represents one interview of that type unless an additional number is provided.
[b] Businesses included in the table are the initially suggested options to reflect impacted industries (See Tables 2 through 6). Actual numbers of interviews conducted are presented in Table 22.

Table 20

Top BOEM Industries Impacted Based on Total Dollar Value of Claim in GCCF Data

Industry	Texas	Louisiana	Mississippi	Alabama	Florida
Boat Dealer/Seller	✓				
Casino			✓		
Charter Fishing	✓	✓	✓	✓	✓
Hotel/Motel/Bed & Breakfast/Resort	✓	✓	✓	✓	✓
Marina/Dock/Ice Houses		✓		✓	✓
Restaurant/Bakery/Food Stand/Bar	✓	✓	✓	✓	✓

Note: This table is based on the results of the GCCF claims analysis presented in Table 6 through Table 10.

5.1.3 INTERVIEW FIELD GUIDES

ERG developed four sets of questionnaires for conducting the in-person, semi-structured interviews with: (1) local and regional tourism bureaus, (2) trade associations, (3) businesses, and (4) regional alliances. **Table 21** lists topics discussed with each group. The interviews were semi-structured in nature; that is, we started with a set of questions and let interviewees provide information related to the themes of the questions. This allowed for a rich discussion of how the impact had affected the region the interviewee was familiar with. The set of questions we used to guide the discussions can be found in Appendix E

Table 21

Interview Guide Topics by Interviewee Type

Local and Regional Tourism Bureau Interview Topics	Trade Association Interview Topics
▪ Overview of tourism bureau and local TTR ▪ Travel, Tourism and Recreation Economy (TTR) - TTR before DWH - Impacts of DWH - Recovery from DWH - Current TTR - Future TTR ▪ Tourism Bureau - Key challenges of DWH - Methods of response to DWH	▪ Overview of trade association and industry(s) represented ▪ Industry Represented by the Association - Industry before DWH - Impacts of DWH - Recovery from DWH - Current Industry - Future of Industry and TTR ▪ Trade Association - Key challenges of DWH - Methods of response to DWH
Business Interview Topics	**Regional Alliances Interview Topics**
▪ Overview of Business ▪ Business before DWH ▪ Impacts of DWH ▪ Recovery from DWH ▪ Current Business ▪ Future of Business and TTR	▪ Overview of Alliance ▪ Impacts of DWH ▪ Recovery from DWH (TTR and Alliance efforts) ▪ Current TTR ▪ Future TTR

5.1.4 INTERVIEW PLAN

The local and regional tourism bureaus were the initial points of contact for each of the seven geographical regions identified in Section 5.1.1 and the primary destination around which field visits were organized. ERG scheduled and coordinated interviews with the remaining interviewees as outlined in the steps below.

- ***Contacted tourism officials.*** ERG contacted each of the identified tourism bureaus identified in the study areas to explain the study purpose and schedule an in-person interview with a representative(s) from the bureau.
- ***Gathered business contacts.*** During the discussion with tourism bureaus, ERG also asked for their recommendations in identifying businesses, in their local area, that might be interview candidates. ERG considered the geographical location and industry sector of the business (see Section 5.1.2 related to selecting business interviewees) in determining their suitability for the field interviews.
- ***Contacted trade associations.*** After the tourism bureau interview date was scheduled for a particular region, ERG contacted nearby trade associations in an effort to schedule interviews within the same timeframe.
- ***Identified other interviewees.*** After interviews with tourism officials and nearby trade associations (where possible) were scheduled, ERG followed up with suggested business contacts, regional alliances, and other interviewees in the region to attempt to schedule interviews within same the timeframe as the already-established interviews. Interviewees unable to meet with ERG staff during the field interview timeframe were considered for phone interviews or additional interviewee suggestions were obtained from the tourism and trade organizations.

5.1.5 IMPLEMENTATION

ERG sent interview teams of two ERG staff members to six geographical regions (see Section 5.1.1) to conduct in-person interviews, with the exception of the initial field interview trip described below. Each trip was slightly different in the number of interviews held and in the number of trip days that were required. Because the primary contacts established by ERG were the local and regional tourism bureaus and trade associations, ERG scheduled primary trip logistics based on the location of those entities.

ERG allowed 1–2 hours for each field interview, depending on the party being interviewed. For example, interviews with tourism officials were often lengthier, based on the volume of information being shared, so ERG allowed approximately two hours for these interviews. In contrast, interviews with businesses were briefer, lasting closer to one hour.

ERG conducted the initial set of field interviews in the New Orleans, Louisiana area. This set of interviews was conducted by ERG's project manager and two other ERG project team members who would help conduct the remaining sets of field interviews. The initial interviews provided the core field interviewing team the opportunity to learn from the initial field experience, making any necessary adjustments, anticipating future logistical issues, and ensuring consistency with the remaining field work. At the end of the initial interviews, ERG staff held an in-person meeting with BOEM to provide a debriefing on the initial set of interviews and share information and results.

ERG conducted a total of 24 field interviews across the four interview categories of tourism bureaus (nine interviews), trade associations (five interviews), businesses (nine interviews), and other (one interview). These interviews were divided among the interview sites specified in Section 5.1.1. **Table 22** shows the types of interviews conducted in each of the interview sites by ERG.

Table 22

Interviews by Focal Area and Interviewee Type

Category	Field Plan Targeted Number (All Visits)	Total Number Completed by Trip							Total Number Completed
		LA	AL	West Coast FL	NW FL	MS	Matagorda County, TX	Galveston TX	
Tourism Bureaus	9	2	1	1	2	1	1	1	9
Trade Associations	6	0	1	1	0	2	0	1	5
Businesses	9	4	1	1	2	0	0	1	9
Other	5	1	0	0	0	0	0	0	1
Business Details									
Boat Dealer	1	0	0	0	0	0	0	1	1
Charter boat Operator	1	1	0	0	0	0	0	0	1
Charter Fishing	1	0	0	1	0	0	0	0	1
Lodging	2	0	0	0	1	0	0	0	1
Marina Owner	1	0	0	0	0	0	0	0	0
Restaurant	2	1	1	0	1	0	0	0	3
Tour Operator	1	1	0	0	0	0	0	0	1
Other	0	1	0	0	0	0	0	0	1

5.2 FINDINGS

After the field work, ERG compiled interview notes and assessed the collected information to identify themes and relevant information that we had found during the field work. We begin by presenting these over-arching themes. We then present region by region results (using the regions identified in Table 18). County-specific information from the interviews is also included on the relevant county profiles in Appendix B.

5.2.1 OVER-ARCHING THEMES

Based on the results of the field work, we identified the following themes:

- ***The Gulf-area tourism economy before the DWH oil spill was projected for a record year in 2010.*** Before the spill, tourism and industry interviewees were estimating 2010 to be a comeback year for tourism and recreation sectors. Interviewees conveyed that both the recession and Hurricane Katrina (depending on interview site) had created a slump in the tourism economy and 2010 was expected to be a strong year for tourism in the Gulf. This expectation led some interviewees to make business investments, such as purchasing or upgrading equipment.
- ***Public perception challenges were second only to the direct impacts of oil.*** Nearly all interviewees cited public misperception about the direct impacts of the oil spill as one of the biggest challenges resulting from the spill, even when compared to the direct impacts of oil. Interviewees cited the media as fuelling the public's perception that all of the Gulf Coast was covered in oil, rather than the actual areas impact and the level of actual impacts to those areas.
- ***Although there were significant impacts from the oil spill, some areas were less affected and able to rebound quickly.*** Most interviewees indicated that there were decreased levels of tourism and recreation revenues, and even business closures, due to the spill. Interviewees in northwest Florida noted a large percentage of businesses were financially strained or bankrupted because of the effects of the spill. However, interviewees along the west coast of Florida noted that businesses were able to rely on the diversity of their tourism market (e.g., conventions, sports) to minimize tourism losses. The extent of financial loss and the industries most affected by the spill varied across the interview sites.
- ***When the spill occurred, previous planning, information, and experience were key to minimizing the impact.*** Some interviewees commented that one challenge that they faced during the spill was being able to gather reliable, up-to-date information from a single source, and now, having gone through the experience, they are more prepared for responding to such disasters in the future. Tourism officials who had worked through Hurricane Katrina, for example, said that the previous public relations strategizing, public relations efforts, and planning for that disaster had given them the tools to take action when the oil spill occurred.

- ***Collaboration among businesses and tourism officials aided recovery efforts.*** The oil spill prompted collaborative efforts for information sharing, public relations messaging, and keeping tourism and recreation businesses afloat. For example, the Gulf Coast Alliance for Economic and Environmental Resilience brought together Chambers of Commerce, tourism officials, and businesses from around the Gulf in order to share information about the oil spill and help facilitate recovery efforts. The Coastal Coalition in Louisiana applied jointly for BP funds and received $5 million; the funds went to the coalition, then to individual parishes, rather than to the CVBs. Tourism and trade association interviewees in Mississippi also noted that the oil spill helped them realize the advantages of marketing the entire Mississippi coast (e.g., linking activities and attractions for visitors), rather than promoting each county by itself.
- ***BP funding helped facilitate recovery.*** Interviewees, particularly tourism officials, said that recovery for the local tourism and recreation economies were underway, in large part due to BP funding. BP funding allowed tourism officials to increase public relations and messaging, helping to convey actual oil impacts and beach conditions and promoting local attractions and businesses. Businesses used BP funding to help recover some of their spill-related financial losses. Though tourism officials were already seeing improved tourism revenues and statistics during the time these interviews were being conducted (summer of 2012), some businesses were seeing a slower return to their desired revenue and visitor levels.
- ***The BP claims process received mixed reviews from businesses.***[18] Interviewees had varying impressions of the BP claims process. Most interviewees noted that the key to successfully receiving claims payment is the ability to produce detailed financial business records. Some businesses found the process to be rather straight forward, but others were not able to produce adequate claims documentation, and many found the process to be lengthy and frustrating.
- ***Unresolved challenges revolve around uncertainty.*** Many interviewees mentioned uncertainty following the oil spill when ERG asked them about any unresolved challenges. The types of uncertainty mentioned included the health of the environment, business recovery, or tourism levels after BP funding is decreased.

The interview highlights from each geographical focal area are presented in the following subsections.

[18] At the time interviews were conducted, ERG was asking about the GCCF process. The GCCF process was terminated and replaced by The Court Supervised Settlement Program on June 4, 2012.

5.2.2 ALABAMA

Field work in Alabama covered the two counties in the state that borders the Gulf of Mexico: Baldwin and Mobile. Interviewees in the state included the Gulf Shores/Orange Beach Tourism Bureau, the National Association of Charterboat Operators (NACO), and a restaurant. Oil reached the Alabama shoreline in June of 2010.

Overview of local tourism economy before the DWH spill

Baldwin and Mobile counties comprise 35 percent of Alabama's tourism dollars. The customer base for these counties is a "drive market"; the majority of tourists are families, most of whom visit the area during the summer and some during the spring. One of ERG's interviewees indicated that, locally, tourism creates $2.3 billion in indirect spending, with $1.5 billion of that spending occurring during the summer.

Before the DWH incident, the area had been coming out of two years of economic recession. Though tourism revenues had been high for 2007, revenues were down in 2008–2009. One interviewee noted that 2010 was expected to be a "comeback year," with an expected 12–20 percent growth over 2009.

Impacts of the DWH spill

Interviewees began seeing the impacts of the DWH oil spill in May and June of 2010. One interviewee indicated that the impacts of the spill were felt in May when sections of Gulf waters were shut down and people could not eat seafood or go out on chartered boat trips. During the time immediately following the spill, some boats were hired by BP contractors to do clean-up work; however, the interviewee also expressed some concern about the large number of non-local boats being hired. An interviewee in the restaurant industry said that they did not start feeling the impacts of the spill until June, because the impacts for the month of May had been offset somewhat by a previously planned food and music festival.

The oil spill presented a range of impacts to the local tourism economy. One interviewee described 2010 as a "washout," stating that there had been no tourists and that several of the established businesses in her area had closed. A restaurant owner said that generating customers was a challenge for his business and that he had trouble keeping staff because the BP compensation package paid more if people did not work. A tourism official noted that about half of the accommodations revenue typically gained between July and August was lost (the official also noted that 65 percent of total annual accommodation revenues occur between July and August). From June 2010 to the end of August 2010, lodging was down 48 percent and retail sales were down 28 percent compared to the same time period of 2009.

Recovery

At the time of interviews (summer 2012), the clean-up process was continuing; BP crews were out every morning looking for tar balls (the quantity of which was decreasing, at that point). Charter boat operators were trying to combat the public perception of the environmental quality of the area by posting, on their websites, pictures to illustrate the conditions that they were experiencing in contrast to the images shown by the national media. One interviewee noted that BP grants for supplemental tourism marketing and benefit concerts were beneficial in bringing visitors back; however, interviewees had mixed feelings about BP settlement claims for businesses.

Some interviewees felt that the claims process was handled quickly and fairly; others felt it was difficult and slow and noted the process to expand eligibility has taken time. Some noted fraudulent claims were a concern for maintaining staff. Interviewees also indicated that the BP "Vessels of Opportunity" program was good for charter boat operators, but more program oversight was needed.

By October 2010, business in Alabama's coastal counties started rebounding. An interviewee for Gulf Shores-Orange Beach Tourism said that in 2011, compared with 2009, lodging was up 18 percent and retail sales were up 11 percent. He also noted that sales in 2012 were running ahead of those for 2011. Interviewees mentioned that they had not yet seen a return of their international tourist base.

As tourism related revenues beginning to recover, interviewees noted several remaining challenges. These unresolved challenges include:

- The need for additional scientific studies, such as an accurate picture of the remaining oil in the Gulf (e.g., tar mats pictures, oil that may still wash up with storms); a scientific peer-reviewed study of the effects of oil now at the bottom of the Gulf; and studies about long-term health effects related to the oil spill.
- How the tar mats buried in the surf zone will affect tourism in the future.

Lessons Learned

Interviewees conveyed that one of biggest lessons they learned from their experience with the DWH oil spill was related to communication and public perception. Interviewees commented that the DWH incident generated fear of how the spill would be dealt with and the extent to which the region would recover and an aggressive public relations and communications plan was need to counteract those fears. The CVB tried to convey the message that they were a source of authoritative information from trusted parties (e.g., NOAA, US Coast Guard). They also uploaded daily videos on their website to depict actual conditions.

5.2.3 PANHANDLE FLORIDA

Field work in the Florida panhandle area covered seven counties: Walton, Bay, Franklin, Gulf, Escambia, Santa Rosa, and Okaloosa. Interviewees included the Northwest Florida Tourism Council, Visit Florida, a hotel, and a restaurant. Oil arrived in the Florida panhandle approximately 12 days following the DWH explosion.

Overview of local tourism economy before the DWH spill

The primary tourism industries throughout northwest Florida are lodging and restaurants. From there, ancillary businesses, such as grocery stores, retail, and beach vending, and activity industries are of importance. Though that mix of industries is similar across northwest Florida counties, the importance of particular industries within that mix varies from location to location. For instance, Gulf County's tourism industries are mainly fishing, scalloping, and "shack restaurants," while other counties also have military bases that are huge economic engines.

Before the DWH spill, the tourism economy in northwest Florida had been feeling the effects of the national economic recession; however, there was an optimistic outlook on tourism in the area. An interviewee with Visit Florida noted that tourism in Florida has a strong brand, so the recession hurt it less than other sectors. The tourism sector as a whole was doing relatively well in 2009; development of the Northwest Florida Beaches International Airport was underway, and there was much anticipation that this was going to be the "comeback year" for tourism in the area.

Impacts of the DWH spill

The direct impacts of the spill were felt most in the four northernmost counties in northwest Florida, and the other areas suffered mainly indirect impacts stemming from perception-based issues. For example, because 60 percent of Walton County's residents are involved in tourism, the spill had a trickle-down effect and eventually affected almost all residents. The lodging industry in northwest Florida was hit the hardest, and the impacts moved in rapid, concentric geographic circles outward from there to other businesses in the local tourism economy.

Interviewees noted that the public's perception of the spill's impacts were worse than the actual direct impacts. One interviewee commented, "The biggest perception damage we suffered was from the national media. It gave visitors the belief that we were covered in oil." Public concerns over the cleanliness of beaches and the contamination and sourcing of seafood led to cancellations, lost bookings, and an overall decrease in visitors; this translated into the loss of jobs and the relocation of some business owners and residents. One interviewee also indicated that the businesses that had been able to remain open often lowered their prices in order to keep customers, but this, in turn, decreased their overall revenue stream.

Recovery

Interviewees conveyed that BP funds generated tourist interest in markets where there had not been previous interest, and this opened the door to new opportunities for local tourism industries. In northwest Florida, an interviewee for South Walton (Florida) Tourism Development Council (TDC) said that the BP funds that were spent on tourism advertising showed up directly in the region's revenues. For example, all seven counties in the Northwest Florida Development Council have had increased tourism revenues over the last 15 months (spring 2011 to summer 2012); South Walton had 15 months of double-digit increases in revenues during the same timeframe. BP funds had to be used on top of normal operating funds, and many TDCs were operating with twice their annual operating budgets. On a state-wide level, interviewees were not seeing any long-term impacts resulting from the spill, and interviewees also noted that most people had moved beyond the spill. One interviewee noted, "[At this time,] [t]he spill is not really shaping people's decision to visit or not; visitors are coming from outside of Florida."

Interviewees had contrasting business perspectives about the claims process. One business, which outsourced the claims work, felt the process was simple and efficient, but the other business (still involved in the process at the time of the interview), was finding the process tedious. Interviewees also asserted that there was fraud and inconsistency in the claims process, that some fraudulent claims were being paid, and that there were valid claims that received no money.

A tourism official in northwest Florida conveyed that after the spill, a "new normal" was created within the tourism sector, in which high levels of tourism promotional dollars made available by BP helped increase the numbers of tourists and tourism revenues beyond pre-spill levels. The interviewee commented that it is just a matter of time before the post-spill tourism spikes level off due to the soon-to-be disappearing BP funds. Interviewees expressed uncertainty about what the tourism sector would look like when the additional funding disappears, and some of the leveling off in the tourism industry associated with the decrease or end of BP funds is anticipated to be evident after the 2013 season.

Lessons Learned

Lessons learned from the DWH oil spill that were conveyed by interviewees include:

- Having one go-to source of accurate information about the oil spill impacts and spill response would have been extremely helpful.
- Having strategic marketing plans for the BP grants was critical; so was having metrics that demonstrated the success of how those strategies were applied.
- Creating transparency around the issues by communicating spill impacts and issues clearly to the public and tourism development council members was key.

5.2.4 FLORIDA (WEST COAST)

Field work along the west coast of Florida covered four counties: Pinellas, Hillsborough, Lee, and Charlotte. Interviewees included the St. Petersburg/Clearwater Area Convention and Visitors Bureau, representatives for charter fishing and sport fishing tournaments, the Southwest Florida Marine Industries Association, and Visit Florida. No oil reached the shores of west Florida.

Overview of local tourism economy before the DWH spill

Some of the mainstays to the tourism economy on the west coast of Florida are conventions, beaches, sports (participatory and professional baseball and football), boating, and sport and charter fishing. Interviewees on the west coast commented that before the DWH incident, the economic recession had taken a toll on tourism-related businesses, and they were just starting to regain momentum. For example, one interviewee noted that approximately 50 percent of boat businesses in his area closed or went out of business due to the recession. Those who survived did so largely due to consolidation in businesses. Portions of the population who typically purchase new boats were keeping their old boats and repairing them, which hurt new boat sales but helped maintain employment in the service sector of the industry.

Impacts of the DWH spill

Interviewees for the west and southwest coastal areas faced greater indirect impacts from the oil spill (such as negative public perception and decreases in consumer purchases of marine products) than direct impacts from oil. In terms of business impacts, the restaurant industry on the west coast of Florida was hit particularly hard, and because of the oil spill, combined with economic effects of the recession, fewer surplus consumer dollars were spent in the recreational boating and marine industries. The marine trades industries were also directly affected by the increased price of oil after the spill (i.e., fuel for vessels).

Recovery

The west coast region was not directly hit by oil and it received less BP recovery funding than areas that had had direct impacts, such as northwest Florida. Interviewees noted that after the near-term effects of the spill had been mitigated (e.g., public perception, cancellation of near-term fishing tournaments), the spill was out of the minds of tourists and the tourism and recreational economies began to bounce back. On an industry level, the marine industry is facing a slightly slower return than the tourism industry around St. Petersburg and Clearwater because it does not share the diversity of tourism activities (e.g., conventions, sporting events). There is also a slower return to the activity of recreational boating.

Lessons Learned

Interviewees relayed the following lessons learned from their experience with the DWH incident:

- Although the interviewees noted that it is very difficult to plan for a disaster on the scale of the DWH spill, one interviewee commented that the incident encouraged some additional financial planning in case of such disasters. For example, the interviewee noted that fishing tournaments have started setting aside 10 percent of their annual revenue to prepare for drastic drops in business like those associated with the spill.
- Communicating "real conditions" to customers and potential visitors was critical in creating public awareness about the actual impacts of the oil spill to areas on the west coast of Florida. For example, using web cams, social media, and updates from scientific experts help combat the misperception that the entire coast was covered in oil.
- The increased availability of scientific information about the oil spill would have been beneficial. Videos of scientists assessing the safety of the water and the seafood would have been very useful, and would be in the event of a future crisis.

5.2.5 Louisiana

Field work in Louisiana was done in two parishes: Orleans and Terrebonne. Interviewees included the Houma Convention and Visitors Bureau, the New Orleans Convention and Visitors Bureau, the Gulf Coast Alliance for Economic and Environmental Resilience, a fish processor, a restaurant, a tour operator, and a charterboat operator. Oil reached the Louisiana shore in some places.

Overview of local tourism economy before the DWH oil spill

The tourism economy in Louisiana varies slightly by location. In the Houma area, tourism and recreation focus on the environment (marshes and wetlands) and culture. Interviewees stated that charter fishing is a major draw because the area has high fishing limits relative to nearby states and due to the richness of the Mississippi River delta and the marsh and coast lands. In contrast, the New Orleans Metropolitan Convention and Visitors Bureau (which promotes New Orleans and the six surrounding parishes) noted that the major industries it supports are hotels, restaurants, venues, attractions, transportation companies, and musicians and artists.

Before the oil spill, tourism in Louisiana was rebounding from a string of hurricanes, including Hurricane Katrina, and the economic recession. Tourism officials and business operators alike were anticipating that 2010 would show positive growth in the tourism sector, with businesses on the upswing and the area seeing a return of the leisure visitor.

Impacts of the DWH spill

In general, when discussing the impacts of the DWH oil spill, interviewees in Louisiana discussed the cumulative effects of Katrina, the recession, and the oil spill on the tourism economy and related businesses. In terms of more specific impacts, interviewees in New Orleans noted an immediate decline in the demand for seafood, and the increased price of seafood after the spill. A seafood supplier commented that he had trouble meeting his seafood demands because some fisherman and shrimpers had begun working for BP rather than fishing and bringing in seafood. Restaurants saw a decrease in their profit margins because they could not pass the increased seafood prices on to their customers, so they absorbed the cost difference in their businesses or shifted their menus away from the previous quantities of Gulf seafood, or both. Restaurants also faced consumer concerns about the safety and quality of seafood products about a month after the spill occurred. Restaurant industry interviewees found that after people came through the door of a restaurant, they trusted the restaurateur to provide a safe and high quality product. Hotels and motels in the area fared relatively well business-wise; however, the hotel and motel buildings experienced a lot of wear because the clean-up workers were longer-term stays than was typical.

After the oil spill, the BP training facility in Houma served as the BP post-spill command center. This led to Houma-area hotel rooms being full from April through October, with no space to house tourists. On an industry level, marinas and recreational fishing were both impacted because BP leased the local marinas, and charter fishing waters were closed.

Almost all interviewees indicated the media's use of images showing significant degradation had had a negative influence in shaping public perception. Many interviewees noted that the media images were often outdated (e.g., right after the spill) or were of areas not in Louisiana. At the time we conducted the interviews, many businesses felt they were still struggling to overcome those perceptions. Interviewees felt that the media sensationalized the oil spill and, after the spill, did not follow-up with positive coverage. Interviewees stated that the public perception about the safety of seafood and the environmental quality negatively impacted tourism in the area.

Recovery

Houma recovered at a slower pace than New Orleans. For example, a tourism official in Terrebonne Parish stated that 2011 was a bad year for tourism in Houma because of lingering perception problems and potential impacts from general economic down turn. In contrast, an interviewee from the New Orleans Convention and Visitor's Bureau commented that, financially, the CVB had its strongest 3rd quarter in 2010 in recent memory, and 2012 has been a robust year to date (with much of this success attributed to convention/meetings contracts that were in place before the DWH spill occurred).[19]

In terms of the recovery of individual businesses, interviewees conveyed that the ability to receive BP claims funding was dependent on the quality of documentation that the business could provide. Interviewees noted that certain businesses tend to operate more of a cash business and were not able to produce the necessary documentation for their claims. Interviewees stated that the relative success of some businesses after the spill was dependent on their return customer base.

As the tourism industry in Louisiana moves forward from the DWH oil spill, there are still unresolved challenges in the midst of positive signs of recovery. Ongoing issues cited by interviewees include the uncertain supply of seafood and lingering perception issues about the safety of seafood and the environmental quality of the area.

Lessons Learned

Interviewees noted the following lessons learned from their experience with the spill:

- Diversifying and expanding markets is essential to building resiliency along the coast, and there is the potential to increase resiliency in the coast and in the tourism sector.
- Communicating with customers and visitors through media, newsletters, social media, and other public relations efforts are essential for providing up-to-date ground level information and maintaining connections with potential return visitors. Being proactive and beginning this communication as quickly as possible is also important.

[19] Eighty percent of the CVB's funding comes from a percentage of the local occupancy tax on hotel rooms. The CVB receives one percent of the 13 percent occupancy tax placed on hotel rooms.

5.2.6 MISSISSIPPI

Field work in Mississippi was done in three counties: Hancock, Harrison, and Jackson. Interviewees included the Mississippi Tourism Partnership, the Mississippi Hotel and Lodging Association, and the Mississippi Hospitality and Restaurant Association. Oil reached the Mississippi shore.

Overview of local tourism economy before the DWH spill

More than one-third of Mississippi's tourism is located on the coast of Hancock, Harrison, and Jackson counties. The largest tourism sector is gaming (e.g., casinos), followed by hotels and non-casino restaurants. Other attractions, such as golf and charter fishing and boating, add to the draw of the casino industry. Golf and fishing were once major attractions, especially golf, which drew tourists looking to avoid cold temperatures in the upper Midwest and central Canada, but that business has not returned since Hurricane Katrina. Much of the golf business has moved to Myrtle Beach, South Carolina.

The tourist industry in Mississippi is less developed and draws fewer people than the other Gulf States, which have brand recognition. One interviewee commented, "Everyone knows about Orlando (Disney) or the Florida beaches. New Orleans is a global attraction. Florida, Alabama, and Louisiana outspend Mississippi in tourism marketing by better than five to one and have done so for years." The Mississippi Coast's promotion has been primarily confined to the area from Mobile to Jackson to New Orleans, except for the advertising done by casinos. Much of the beach-going is done by Mississippi residents from the central parts of the state because much of the tourist activity is concentrated in and near the casinos.

Before the spill, the economy along the Mississippi coast was slow because of the country's financial crisis and economic recession and the shift in the gaming market that resulted from Hurricane Katrina. From the arrival of the first casino in August 1992 through the opening of the Beau Rivage and IP casinos and into 2004, the tourism industry saw healthy growth, primarily because Mississippi was one of three major gaming markets (with Las Vegas and Atlantic City). Mississippi drew visitors from across the Southeast. Hurricane Katrina halted the state's gaming market and left Mississippi for more than a year without casinos or other attractions, during which time more than a dozen states legalized and began building casinos, and Mississippi became one of many gaming markets. Hurricane Katrina also destroyed, closed, or relocated many area restaurants and negatively impacted the state of the local hotel industry, so before the DWH oil spill, both the restaurant and hotel industries were in the process of trying to re-gain pre-hurricane business levels.

Impacts of the DWH spill

Interviewees stated that the actual environmental impact on the shoreline was not dramatic. Offshore barrier reefs prevented much of the spill from reaching shore. There were some tar balls, but not significantly more than are usually seen. Occasionally, there was a "distinct aroma," but these minor impacts faded quickly. The major problem was one of "perception." People assumed the seafood was tainted and the water polluted and because of the national news coverage, including nightly video of oil washing ashore in Florida and Louisiana, most of the country thought the entire Gulf Coast was covered in oil.

The Mississippi coast saw an increase in cancellations and a noticeable drop in visitor inquiries in May and June 2010. The spill created a "false" lodging economy, in which the volume of clean-up workers after the spill caused the demand for rooms to stay high, but the price per room and overall hotel revenues were down. One interviewee noted that there was a decrease in restaurant business because of a combination of fewer tourists and the fact that many oil spill recovery workers were often getting catered meals instead of eating at local restaurants. Because of the decrease in business, many restaurants had to lay off employees or close. Gaming saw an immediate drop after the spill, and casinos were negatively impacted because contract workers staying in rooms were not spending money at casinos in a similar manner as tourists had. The charter boat industry was hit hard by the impacts of the spill; certain Gulf waters were closed for periods of time and there was a decrease in their customer base associated with casino guests. The oil spill also caused tourism projects to be put on hold due to a lack of tourism interest.

Recovery

The recovery from the DWH oil spill has been rapid, although the Mississippi Coast is still lagging far behind Alabama, Florida, and Louisiana. Interviewees noted that reservations for the Mississippi Coast region started picking up again as the national news moved on to other stories and as BP-funded advertising started taking effect. Hotels also spent more money on marketing than usual to try to attract new and return customers.

Tourist-based business overall is up two percent to three percent in 2012 compared with 2011, though the largest sector, gaming, has been flat. One interviewee indicated that the state's recovery was stifled by the way the BP funding was channeled. The interviewee noted that other states were already seeing gains from their funding being put to work, and Mississippi did not start spending until late fall 2010. This allowed other tourism areas in other states to attract Mississippi coast customers. Though 2011 had been a record tourism year for Alabama, Mississippi tourism was down nearly 10 percent from 2010 and remained flat for the first half of 2012.

Interviewees from the restaurant industry related that the BP claims process was lengthy and frustrating. They said that it took as long as six months to get payments through a two-stage process involving BP and the GCCF, and that some businesses had had to close before they were able to receive funds to help offset the financial losses associated with the oil spill. Interviewees also stated that the application of the claims zones for Mississippi has led to a disparate granting of funding for local businesses. The claim zones did not seem to align with the tourism economy in Mississippi, causing some hardly hit businesses to receive BP funds, while neighboring businesses of similar economic circumstances received no funding. Interviewees attributed some of the inefficiency in the claims process to a rotating claims staff that was filled by non-local people who were not familiar with the area or the perspectives of the spill and the local industry.

Lessons Learned

Some of the lessons learned that interviewees shared from their experience with the spill include:

- A more regional approach to marketing is needed. The Mississippi Gulf Coast, as a whole, needs to move forward in one direction.
- Having a regional organization in place would have been very beneficial in promoting recovery from the spill.
- After this type of incident, funding should be used to address the impacts from a communications and public relations perspective. Specifically, more messaging with less delay is needed.

5.2.7 TEXAS (BOTH SITES COMBINED)

Field work in Texas was done in three counties: Harris, Galveston, and Matagorda. Interviewees included the Boating Trades Association of Metropolitan Houston, the Matagorda County Convention and Visitors Bureau, the Galveston Island Convention and Visitors Bureau, and a boat dealer. Oil reached the Texas shore in some places such as Matagorda County.

Overview of local tourism economy before the DWH spill

The tourism economy in the coastal Texas counties varies by location, but generally includes beaches, historical sites, fishing and boating, and nature-based tourism. Visitors are predominantly from areas within a 300-mile radius of the respective areas and, generally, they drive to the area. Before the DWH oil spill, interviewees from the two Texas interview sites were experiencing different levels of economic impact. Although the economy played a significant role in decreases within the recreational boating and associated industries, tourism in the Matagorda County area did not see a large impact. However, because Galveston County had been significantly impacted by Hurricane Ike in 2008, recovery efforts continued through 2010.

Impacts of the DWH spill

Although Matagorda County experienced some tar balls and Galveston had some oil on the beach, in each area, the oil was not linked to the spill. After the spill all tourism and recreation industries were negatively impacted. Large boat sales decreased, as did boat service and maintenance industries. Small boat sales were also impacted, although to a lesser extent than large boat sales. Overnight hotel occupancy rates decreased; restaurants saw a decrease in visitors and an increased number of questions regarding seafood safety. Charter boats and recreational fishing industries saw decreases, and charter boats were largely unable to participate in cleanup efforts due to the distance from the spill.

Most interviewees stated that the media was a negative influence in shaping public perception. CVBs responded with marketing efforts funded with their own marketing budgets. The CVBs shifted their advertising schedule and distributed factual information through a variety of platforms.

Recovery

Neither CVB went through the BP claims process; however, specific businesses, including boat dealers, were mentioned as currently in the process of filing claims with BP. All interviewees indicated that 2012 had an increase in visitors and customers over 2011 numbers and the visitors were generally originating from the same areas as before the spill. Although large boat sales have slowly started to recover, some struggles still remain within the recreational boating industry.

Lessons Learned

Some of the lessons that interviewees learned from their experience with the DWH oil spill include:

- Someone from a government agency should be based locally to manage the situation.
- Actual conditions and quantification of the situation to customers and potential visitors should be more accurately disseminated on a national scale.
- A regional organization should be in place to help people and organizations recover from the impacts of the incident.

6.0 SYNTHESIS OF RESEARCH FINDINGS

This study has used four separate analyses to estimate and describe the impacts of the *Deepwater Horizon* oil spill on tourism in the coastal counties and states within the study area, including:

- Analysis of the claims collected by the Gulf Coast Claims Facility (GCCF) between August 22, 2010 and March 1, 2012 (Section 2.0),
- Review and synthesis of local-level information on travel, tourism, and recreation in the Gulf of Mexico related to the DWH spill in newspaper articles and tourism bureau websites (Section 3.0),
- Analysis of quarterly employment and wage information associated with BOEM tourism and recreation sectors in the study area (Section 4.0), and
- Field interviews with tourism officials, trade associations, and businesses in the study area (Section 5.0).

ERG has also compiled county profiles for each of the 64 counties in the study area. These are provided in Appendix B.[20] For each county, we have assembled:

- Estimates of travel and tourism-related employment, payroll, and establishments for 2009q2 through 2011q1 based on the data we developed in ERG (2013),
- A summary of the GCCF claims data,
- Relevant field interview findings, and
- Relevant information from tourism bureau websites and newspapers about the impacts of the spill on tourism.

Below is an overview of the findings from each of these analyses, followed by a section that identifies the commonalities and differences among findings.

6.1 SUMMARY OF STUDY FINDINGS

The findings from the four analyses conducted for this study can be summarized as follows:

- ***GCCF Claims Analysis.*** The claims analysis shows that across the study area, the BOEM tourism and recreation industries with the highest dollar amount of paid GCCF claims include: hotels, resorts, restaurants, bars, charter fishing, marinas, boat dealers and sellers, with some variation occurring between states and individual compared with business claimants. The Hotel/ Motel/ Bed and Breakfast and the Restaurant/ Bakery/ Food Stand business types are in the top

[20] Appendix B is not formatted using standard BOEM report formatting for an appendix. Rather, we have formatted the Appendix B to be used as slides in potential future presentations.

five for both types of claimants (individuals and businesses). Geographically, the counties with the highest concentration of paid claims generally spanned from eastern Louisiana eastward to the northwest panhandle of Florida, before skipping down to the Florida counties along the West and Southwest coast of the state.

- ***Quarterly Census of Employment and Wage (QCEW) Analysis.*** The analysis of QCEW travel and tourism related employment data provided the percentage change in associated employment between quarters before and after the DWH oil spill. The analysis showed the variation of spill impacts on local travel and tourism economies; some counties had a decrease in employment following the oil spill, and other counties rebounded to levels of employment higher than those before the spill.
- ***Review of Newspaper Articles and Tourism Bureau Websites.*** The review of tourism bureau websites and newspaper articles related to the spill resulted in identifying a number of key points, including:
  - The tourism and recreation industries within the study area are vital components of the local economy.
  - Local websites steered visitors toward information about area attractions and natural resources rather than addressed the DWH oil spill, but newspaper articles closely followed the potential impacts and rates of recovery associated with the incident.
  - Newspaper articles delved into specific impacts of the oil spill, whether they were the direct impacts of oil on a county's natural resources, beaches, or local seafood, or the indirect impacts to tourism and recreation caused by misperceptions about the actual impacts.
  - Newspaper articles covered the recovery process by highlighting the slow rate at which different aspects of tourism, recreation, and the environment were rebounding or by presenting post-oil spill successes in terms of increasing revenues and visitors.
- ***Field Interviews.*** The field interviews revealed nuanced perspectives of local tourism bureaus, trade associations, and industry officials before, during, and after the DWH oil spill. Field interviews highlighted that, though the oil spill more severely impacted some counties and industries, the impacts of the spill were far reaching. Interviewees conveyed that the impacts were not specific to the areas that were directly impacted by oil on their shores and that public perception associated with the actual impacts of the oil spill was one of the greatest challenges for tourism and industry officials alike. Interviewees highlighted variation in the level of impacts to local businesses and tourism and recreation economies, and differences in how recovery from the incident was approached, funded, and achieved for their particular business, industry, or local tourism economy.

6.2 IDENTIFYING COMMONALITIES AND DIFFERENCES AMONG FINDINGS

The findings presented in Sections 2 through 5 show how the impacts resulting from the DWH oil spill have varied across geographies and industries in the Gulf region, shaping and reshaping the local travel, tourism, and recreation economies and, in some areas, the natural resources on which these economies depend. Below, the commonalities and differences emerging from the findings of the four analyses conducted under this study are highlighted.

- ***The analysis indicated that the DWH oil spill had some significant negative impacts on travel and tourism business establishments and employment, but some data we reviewed showed minimal changes and recovery after the spill.*** The analysis of GCCF data showed that the financial losses associated with BP claims spanned from Texas to the southern tip of Florida, from out-of-state business owners to residents. The spill impacted a range of industries along the Gulf coast. In the study area, the industries most affected were the hotels, resorts, restaurants, bars, charter fishing, marinas, boat dealers and sellers. Newspaper articles echoed the losses revealed by the GCCF analysis. For example:
    - Uncertainty of where and when the oil would land caused much confusion and that translated into misperceptions of what areas were impacted (AP-Port Arthur News, June 2010).
    - A national survey found that one-third of Americans said the spill would affect the likelihood that they will travel to the Gulf Coast in 2010. Of those respondents, about 80 percent said they were either "less likely" or "much less likely" to visit the region (Talbot, 2010).
    - Access to beaches and recreational fishing waters were hampered by the oil spill. The Natural Resources Defense Council issued a report at the end of July 2010 showing that more than 2,000 beach closing, advisories, and notices had been issued in the Gulf region because of the oil spill compared with 237 in 2009 (AP-The Times-Picayune, July 28, 2010).

  The analysis of QCEW data revealed some reductions in the number of travel and tourism employment levels in some counties; however, for the most part, the QCEW data analysis indicated that most counties with more than 1,000 tourism employees saw either an initial decrease in tourism employment or an initial increase in employment followed by increased tourism employment. Interviewees we spoke with, on the other hand, noted the loss of business establishments and employees after the DWH oil spill as a major impact on their areas. A number of these interviewees noted, in particular, the decrease of employees in local restaurants and the closure of restaurants and young charter boat businesses.

- ***The spill had economic impacts over a wide geographic range.*** The research we conducted found that impacts were experienced from Florida to Texas. However, the impacts in Texas were smaller than those in other states, according to the GCCF data. When looking at where people who experienced a loss lived (see Figure 2), we see a wide geographic range of impacts and many losses being claimed by inland residents who owned affected coastal assets.

- ***The impacts of the DWH incident reached well beyond the counties and parishes directly impacted by oil.*** Each analysis showed that the impacts of the DWH oil spill reached beyond the immediate geographic area where oil directly impacted the coast. For example, the geographic distribution of claims losses depicted by the GCCF analysis (see Figure 1) shows the level of financial loss associated with DWH outside the directly-impacted counties. Newspaper articles highlighted surveys that indicated people–potential visitors and those outside the spill area–were confused about the actual impacts of the oil spill; many believed that the spill impacts extended beyond the areas experiencing actual, direct impacts. The majority of interviewees identified the public's misperception about the impacts as a major challenge in dealing with the incident. Interviewees said that areas that did not have direct impacts from the oil spill suffered losses to the local tourism economy due to the public's perception that most of the Gulf coast was covered in oil and not functioning in its typical tourism capacity.
- ***The spill had significant impacts on hotels and restaurants in the Gulf.*** The data we compiled from QCEW and the interviews we performed, along with the reviews of newspapers that we performed, all indicated the hotels and restaurants were the hardest hit among Gulf-area tourism businesses. The GCCF data we analyzed showed that these two sectors were consistently in the top 5 for each state in terms of amounts of claims paid. From August 22, 2010 and March 1, 2012, individual and business claimants in the restaurant sector were paid $1.02 billion in claims from the GCCF and individual and business claimants in the hotels sector were paid $337 million.
- ***Perception is an important economic driver when it comes to tourism and disasters.*** The review of newspaper articles and the field work we conducted indicated that perception is an important aspect of disaster recovery. Interviewees in the field often referred to what they felt were inaccurate portrayals of coastal conditions in the media and felt that these led to a perception among potential tourists that the Gulf coast was contaminated with oil. This was also seen in a number of newspaper articles which cited surveys demonstrating that potential tourists believed that the Gulf coast was contaminated with oil. To combat these perceptions, travel and tourism bureaus put their efforts into portraying accurate conditions, such as by using web cams to show conditions on the beaches.
- ***At this time, Gulf tourism appears to be strongly rebounding from the impact of the spill.*** For the most part, the employment data from QCEW show a rebound to pre-spill levels in the tourism sector. More recent news articles stated there was a strong rebound for tourism in the Gulf. Thus, although the spill had a significant impact on several areas in the short term and had wide-ranging impacts across the Gulf, the tourism economy has rebounded. Although the tourism economy has rebounded to pre-spill levels, this does not account for the possibility that the tourism economy missed 1–2 years of growth while recovering from the spill.
- ***Diversity in the tourism economy is beneficial.*** The counties that seemed to fare better in the face the oil spill appear to be those that had more diverse tourism economies.

- ***BP funding helped boost the tourism and recreation economy in the study area after the DWH oil spill.*** The analyses provide conflicting information about the extent to which BP funding helped boost the local tourism economies. Many newspaper articles covered the economic recovery of communities and states after the oil spill, often stating the use of BP funding was a facilitator of the positive economic change that was occurring. The analysis of QCEW data shows that many counties with more than 1,000 tourism employees saw an improved percentage change in their employment levels in the quarters following the oil spill. Though many tourism officials interviewed identified positive examples of how BP grant funding had been applied to achieve record-breaking tourism revenues, some industry interviewees struggled with the BP claims process and saw other area businesses close before they were able to receive claims funding that could help them sustain their business in the time period immediately following the spill.
- ***Previous experience with disasters and good planning for disasters are important to recovering from a disaster.*** A final lesson learned from the spill is that previous disasters (e.g., Hurricane Katrina) and planning efforts that stemmed from those disasters may have paid dividends. The New Orleans Convention and Visitors Bureau stated they had an overall high preparedness for dealing with the spill based on their experience in recovering from Hurricane Katrina. In that sense, good planning, based on experience, can help mitigate the impacts of a disaster such as an oil spill and can speed up recovery efforts.

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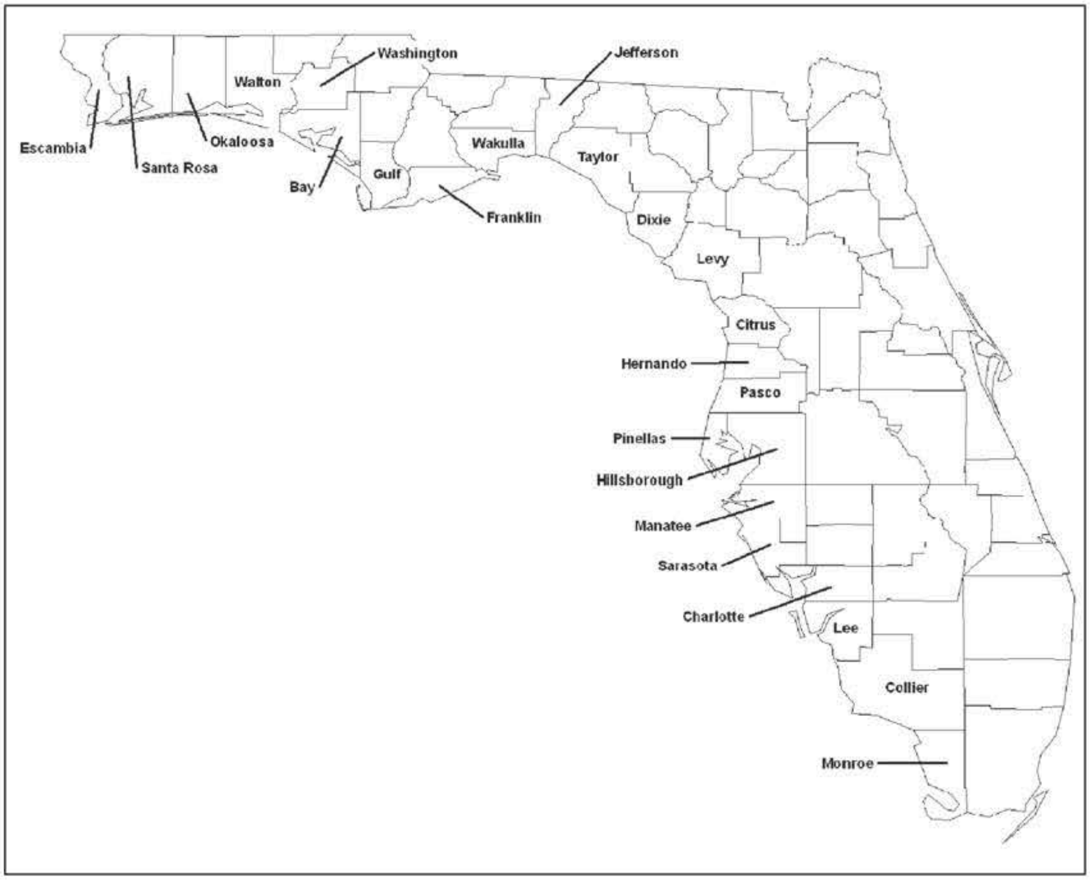
APPENDIX A: MAPS OF IN-SCOPE COUNTIES (BY STATE)

Alabama

US_PP_BOEM000204

Florida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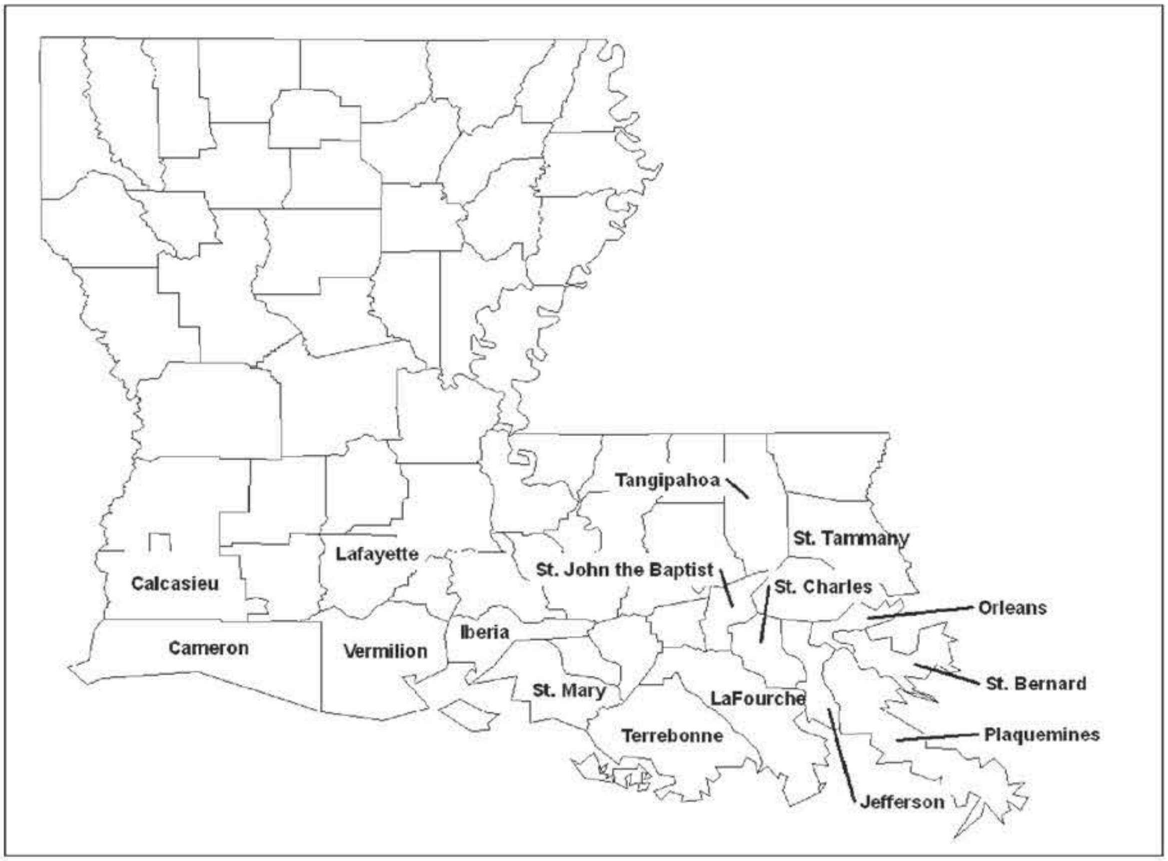
Jefferson
Walton
Escambia
Okaloosa
Santa Rosa
Bay
Gulf
Wakulla
Taylor
Franklin
Dixie
Levy
Citrus
Hernando
Pasco
Pinellas
Hillsborough
Manatee
Sarasota
Charlotte
Lee
Collier
Monroe

Louisiana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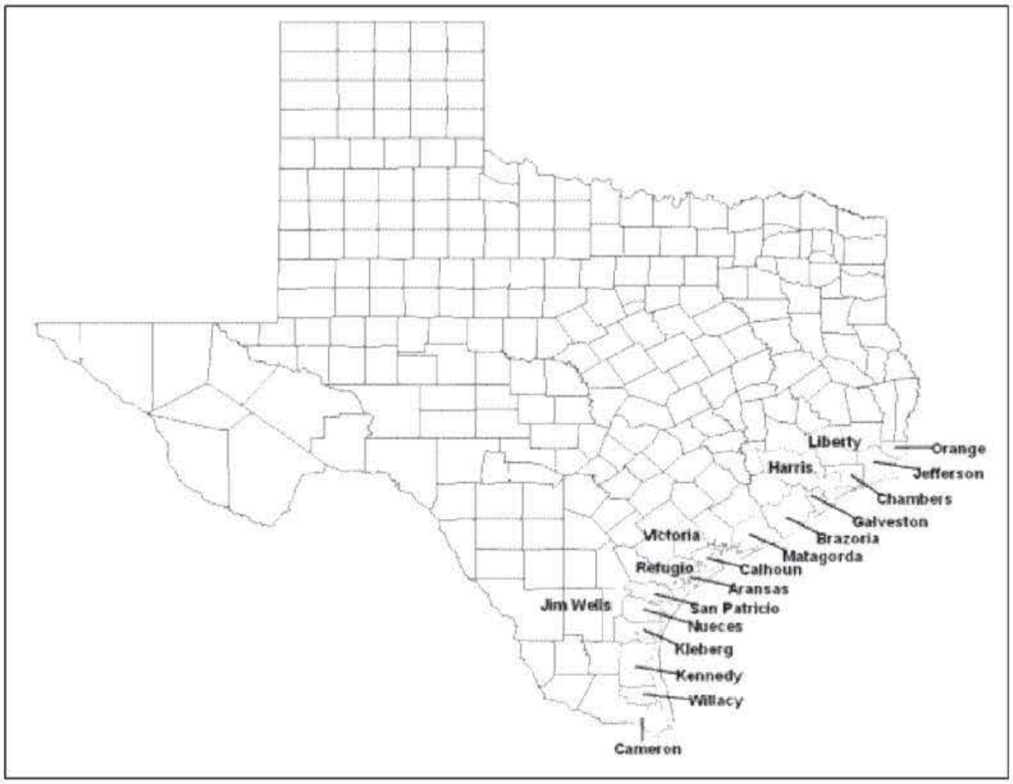
Lafayette
St. John the Baptist
St. Charles
Calcasieu
Orleans
Iberia
Cameron
Vermilion
St. Bernard
St. Mary
LaFourche
Plaquemines
Terrebonne
Jefferson

Mississippi

Texas



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APPENDIX B: COUNTY PROFILES (BY STATE)

Baldwin County, Alabama

2011 Population: 186,717 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	3.7	3.7	3.3	3.2	3.9	3.8	3.4	3.5
Payroll ($M)	$16.1	$16.1	$14.3	$13.0	$17.5	$18.0	$16.6	$15.8
Establishments	208	210	209	206	214	215	216	213

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 34,020
- Individual: 18,162
- Business: 15,858

Value of Claims

- Total Claims: $165.8M
- Individual: $68.9M
- Business: $96.9M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Hotel/Motel/Bed & Breakfast
- Charter Fishing

Field Interview Findings

(Baldwin and Mobile Counties)

- Prior to DWH, businesses were seeing increased revenue after two years of economic recession. When the oil spill occurred, fewer visitors resulted in lodging and restaurant revenue decreases, and many charter boat businesses went out of business due to the closure of waters.
- The media greatly impacted public perception of the area. When the spill first occurred, the media negatively influenced public perception of the area through reports of oil heading toward the beaches and the quantity of oil involved. Later, the media positively shaped public perception by building awareness of the actual impacts to the area, which helped increase the volume of new tourists.
- Interviewees voiced varying opinions regarding the safety of Gulf-sourced seafood, and indicated that an accurate assessment of the oil in the surf zone of the Gulf is needed.

Tourism Bureaus and Newspapers Reviews

- About one-third of Baldwin County's workforce is employed in the tourism industry, and the county outperformed the five neighboring Florida counties in attracting tourists for eight of the last nine years (2001-2010).
- Information identified for Baldwin County tourism and recreation did not mention the DWH oil spill, but rather highlighted the county's coastal beaches, Battleship Memorial Park and the U.S.S. Alabama, and the numerous local parks in comparison to the counties in other nearby states.

Mobile County, Alabama

2011 Population: 412,577 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	5.6	5.5	5.3	5.3	5.6	5.5	5.3	5.3
Payroll ($M)	$24.5	$24.2	$24.4	$22.5	$24.7	$25.1	$24.9	$23.2
Establishments	319	323	321	326	330	334	336	336

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 22,807
- Individual: 16,457
- Business: 6,350

Value of Claims

- Total Claims: $59.6M
- Individual: $30.7M
- Business: $28.8M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Hotel/Motel/Bed & Breakfast
- Charter Fishing

Field Interview Findings

(Baldwin and Mobile Counties)

- Prior to DWH, businesses were seeing increased revenue after two years of economic recession. When the oil spill occurred, fewer visitors resulted in lodging and restaurant revenue decreases, and many charter boat businesses went out of business due to the closure of waters.
- The media greatly impacted public perception of the area. When the spill first occurred, the media negatively influenced public perception of the area through reports of oil heading toward the beaches and the quantity of oil involved. Later, the media positively shaped public perception by building awareness of the actual impacts to the area, which helped increase the volume of new tourists.
- Interviewees voiced varying opinions regarding the safety of Gulf-sourced seafood, and indicated that an accurate assessment of the oil in the surf zone of the Gulf is needed.

Tourism Bureaus and Newspapers Reviews

- Information identified for Mobile County tourism and recreation did not mention the DWH oil spill, but rather highlighted the county's swamp lands and marshes, Battleship Memorial Park and the U.S.S. Alabama, and the numerous local parks in comparison to the counties in other nearby states.

US_PP_BOEM000211

Bay County, Florida

2011 Population: 169,856 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	5.1	4.9	4.0	4.2	4.9	4.8	4.2	4.6
Payroll ($M)	$25.6	$24.7	$21.2	$19.9	$25.5	$24.7	$22.4	$22.2
Establishments	288	296	290	290	297	291	286	290

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 34,685
- Individual: 24,968
- Business: 9,717

Value of Claims

- Total Claims: $173.1M
- Individual: $94.2M
- Business: $78.9M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Hotel/Motel/Bed & Breakfast
- Resort

Field Interview Findings

- For northwest Florida, including Bay County, perception created by the national media was the biggest driver of losses. National media coverage led potential visitors to believe that the entire coast was covered in oil, whereas only NW FL counties (west of Bay County) were hit with oil.
- The lodging industry in northwest FL was hit the hardest, and the impacts moved in rapid, concentric geographic circles outward to other businesses in the area.

Tourism Bureaus and Newspapers Reviews

- Following the spill, sales tax revenues in Bay County stayed flat or decreased, while already high unemployment rates went up (Hammer, 2011).
- Tourism officials in Bay County joined six other northwest FL counties to form the North Florida Tourism Development Council coalition and confronted BP after tourism in those counties had dropped for the early summer season of 2010 due to the fear of oil impacting the coastline (Dean, Sept 2010).
- The resulting BP money allowed the seven area tourism bureaus to try promotions they could never have afforded otherwise, and it has propelled the Panhandle's visitor counts to record numbers. The $7 million that Bay County received in BP funds was more than double its normal $3 million budget (Schneider and Nelson, 2011).

Charlotte County, Florida

2011 Population: 160,511 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	1.7	1.6	1.7	1.8	1.8	1.6	1.6	1.8
Payroll ($M)	$7.2	$6.6	$7.5	$7.5	$7.6	$6.3	$6.9	$7.5
Establishments	141	142	145	143	143	138	137	142

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 762
- Individual: 537
- Business: 225

Value of Claims

- Total Claims: $7.3M
- Individual: $3.6M
- Business: $3.7M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Charter Fishing
- Hotel/Motel/Bed & Breakfast

Field Interview Findings

- Interviewees for the southwest coastal areas of Florida stated that the area primarily faced indirect impacts of the spill (such as negative public perception and decrease in consumer purchases of marine products) rather than direct impacts from oil.
- Interviewees stated that because the region was not directly hit by oil, once the near-term effects of the spill were mitigated (e.g., public perception, cancellation of near-term fishing tournaments), the spill was out of the minds of tourists and the tourism and recreational economies began to bounce back.
- The marine industry is facing a slightly slower recovery than the tourism industry around St. Petersburg/Clearwater, because it does not share the diversity of tourism activities.

Tourism Bureaus and Newspapers Reviews

- Tourists were confused about which Florida beaches were impacted by the oil spill. In one survey, a number of respondents incorrectly believed that there was oil on west coast beaches from St. Petersburg to the Florida Keys (16 percent of respondents), in South Florida from Miami to Palm Beach (8 percent of respondents) and all the way up the east coast from Daytona to Amelia Island (5-6 percent of respondents) (Trigaux, 2010).
- Visit Florida, the state's quasi-public tourism agency, launched major television and online advertising to reassure tourists in southeastern U.S. markets that the Florida beaches were clean.

Citrus County, Florida

2011 Population: 140,031 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	1.1	1.1	1.0	1.1	1.1	1.1	1.1	1.0
Payroll ($M)	$4.7	$4.6	$4.2	$4.5	$4.5	$4.5	$4.7	$4.1
Establishments	109	109	108	112	111	112	108	109

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 357
- Individual: 117
- Business: 240

Value of Claims

- Total Claims: $2.2M
- Individual: $2.1M
- Business: $157,670

Most heavily impacted industry sectors

- Hotel/Motel/Bed & Breakfast
- Restaurant/Bakery/Food Stand
- Charter Fishing

Field Interview Findings

- Tourism Development Councils in the west and southwest coasts of Florida tried to highlight the lack of oil on their beaches to combat the public perception that all of Florida was covered in oil.
- In terms of industries impacted by the oil spill, restaurants on the west coast of FL were hit particularly hard.

Tourism Bureaus and Newspapers Reviews

- Using Facebook, Twitter, and the Citrus County tourism's website, the tourism office offered constant updates for potential visitors (Wright, 2010). St. Pete Beach put webcams on the beach to show on the internet that people were on the beaches (Citrus County Chronicle, 2010).

Collier County, Florida

2011 Population: 328,134 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	8.7	7.4	8.2	8.9	8.6	7.8	8.5	9.3
Payroll ($M)	$62.9	$49.2	$62.3	$65.2	$66.5	$55.1	$63.8	$72.4
Establishments	389	387	390	388	393	389	394	394

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 10,222
- Individual: 9,063
- Business: 1,159

Value of Claims

- Total Claims: $75M
- Individual: $48.4M
- Business: $26.6M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Hotel/Motel/Bed & Breakfast
- Resort

Field Interview Findings

- Counties on the southern portion of Florida's west coast primarily suffered from indirect impacts from the oil spill, such as negative public perception that the entire coast was covered in oil when, in actuality, oil only reached a handful of counties in the northwest panhandle.
- Tourism Councils in these areas tried to highlight the lack of oil on their beaches to combat the public perception that all of FL was covered in oil.

Tourism Bureaus and Newspapers Reviews

- Although news articles and website searches did not specifically identify Collier County, news stories noted that areas untouched by the oil plume area (which spanned from Pensacola to Panama City) were also adversely impacted by the oil spill, with resulting revenue losses for businesses such as hotels and restaurants.
- Following the spill, Collier County tourism was up 3 percent in July, August and September when compared with 2009 in terms of the number of visitors. There were fewer U.K. tourists in 2010, but overall tourists coming from Germany and Europe increased slightly compared with prior years (Farrell, 2010).

Dixie County, Florida

2011 Population: 16,486 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.08	0.08	0.07	0.05	0.04	0.01	0.01	0.02
Payroll ($M)	$0.25	$0.27	$0.24	$0.14	$0.13	$0.03	$0.04	$0.04
Establishments	12	12	12	10	10	10	10	10

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 36
- Individual: 8
- Business: 28

Value of Claims

- Total Claims: $105,450
- Individual: -
- Business: $105,450

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Bar

Field Interview Findings

- Dixie County was not explicitly addressed through field interviews, however, interviewees in other counties outside of the northwest panhandle where oil reached the shore noted that combating negative public perception about the cleanliness of their beaches was one of the greatest challenges that they faced.

Tourism Bureaus and Newspapers Reviews

- Although Dixie County was not specifically mentioned in the website and newspaper materials reviewed, on a state level, there was a shift in Florida's tourists from the west to east coasts, and Visit Florida, encouraged local tourism council to show actual beach conditions through webcams and other media to help convey the actual conditions of the state's beaches.

Escambia County, Florida

2011 Population: 299,114 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	4.1	4.2	4.0	4.2	4.4	4.4	4.1	4.2
Payroll ($M)	$17.1	$17.4	$17.2	$16.3	$19.2	$19.1	$17.4	$16.8
Establishments	283	292	285	292	292	289	287	296

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 19,034
- Individual: 13,629
- Business: 5,405

Value of Claims

- Total Claims: $91.7M
- Individual: $52.3M
- Business: $39.4M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Hotel/Motel/Bed & Breakfast
- Bar

Field Interview Findings

- Escambia County was one of four Florida counties that were most directly impacted by the oil spill, with oil reaching the county's shores.
- Interviewees noted that for northwest Florida, the biggest perception damage suffered was from the national media and how they portrayed the amount of oil covering the area. This led to a lack of consumer confidence in the cleanliness of the beach and an associated decline in the number of area tourists.
- The BP funds that were spent on advertising showed up directly in the region's revenues.

Tourism Bureaus and Newspapers Reviews

- In 2010, sales tax revenues stayed flat or decreased, while already high unemployment rates went up (Hammer, 2011).
- Following the spill in 2011, tourism in Escambia County set lodging revenue records in both June and July. Every month but November saw double-digit increases compared to the pre-oil spill revenues of 2010, and every month but April beat out revenue increases in other northwest Florida counties. The county attributed the increase to its tourism budget being about three times its normal size (Gulf Breeze, Sept. 2011).
- Tourism leaders say the post spill economic bounce is fueled in part by an influx of BP money that has gone to promote Gulf Coast beaches.

Franklin County, Florida

2011 Population: 11,596 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.3	0.3	0.2	0.3	0.3	0.3	0.3	0.3
Payroll ($M)	$1.1	$1.1	$1.0	$0.9	$1.1	$1.1	$1.1	$0.9
Establishments	29	28	27	29	29	29	29	29

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 3,211
- Individual: 1,755
- Business: 1,456

Value of Claims

- Total Claims: $10M
- Individual: $3.8M
- Business: $6.2M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Hotel/Motel/Bed & Breakfast
- Charter Fishing

Field Interview Findings

- Just to the East of the four northernmost FL counties that received the heaviest direct impacts from DWH, Franklin County dealt more with issues of public perception than oil or tar balls.
- There is uncertainty about what the tourism sector will look like when the additional BP funding disappears, and some of the leveling off in the tourism industry associated with the decrease/end of BP funds is anticipated to be evident after the 2013 season.

Tourism Bureaus and Newspapers Reviews

- Franklin County expected to see a 10 percent decline in tourism as a result of the oil spill, and tourism was down 25 percent in 2010 compared to 2009 (Alderstein, 2010; Semuels, 2010).
- Only four of the state's 67 counties have been touched by oil, all on the Panhandle closest to the Alabama border. But in Franklin County, tourism was down 25 percent from 2009.
- Tourism officials in Franklin County joined six other northwest FL counties to form the North Florida Tourism Development Council coalition and confronted BP after tourism in those counties had dropped for the early summer season of 2010 due to the fear that oil would reach their coastlines (Dean, Sept 2010).
- The BP funding received by Franklin County was double their regular $750,000 budget for tourism (Schneider and Nelson, 2011).

Gulf County, Florida

2011 Population: 15,844 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.2	0.2	0.1	0.1	0.1	0.1	0.1	0.1
Payroll ($M)	$0.7	$0.8	$0.7	$0.2	$0.3	$0.3	$0.3	$0.2
Establishments	18	18	18	17	18	19	18	16

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 1,722
- Individual: 899
- Business: 823

Value of Claims

- Total Claims: $5.7M
- Individual: $2M
- Business: $3.7M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Charter Fishing
- Snorkeling and Diving Tour Provider

Field Interview Findings

- In northwest Florida, negative media attention shaped public perception about the cleanliness of the beaches.
- Interviewees attributed the decline in tourism to potential visitors questioning the cleanliness of the beaches and the safety of the seafood.
- There were contrasting business perspectives about the BP claims process. One business, which outsourced the claims work, felt the process was simple and efficient, while another business (still involved in the process at the time of the interview), was finding the process to be tedious.

Tourism Bureaus and Newspapers Reviews

- Following the oil spill in 2010, Gulf County bed tax revenues were down five percent from the previous fiscal year 2008-2009. Reports noted that tourists avoided places like Destin and Pensacola and moved further east to vacation in the county (Dean, July 2010).

Hernando County, Florida

2011 Population: 173,094 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	1.4	1.3	1.3	1.3	1.4	1.3	1.4	1.3
Payroll ($M)	$5.2	$4.9	$5.4	$5.1	$5.4	$5.3	$5.7	$5.1
Establishments	115	116	120	116	116	114	113	110

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 201
- Individual: 79
- Business: 122

Value of Claims

- Total Claims: $1.3M
- Individual: $294,844
- Business: $973,744

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Hotel/Motel/Bed & Breakfast
- Charter Fishing

Field Interview Findings

- Interviewees for the west and southwest coastal areas faced greater indirect impacts of the spill (such as negative public perception and decrease in consumer purchases of marine products) than direct impacts from oil.
- Restaurants on the west coast of the state were hit particularly hard.
- The oil spill, combined with economic effects of the recession, caused consumer surplus dollars to be shifted away from recreational boating and marine industries. The marine trades industry was also directly affected by the increased price of oil following the spill (i.e., fuel for vessels).

Tourism Bureaus and Newspapers Reviews

- At the state level, only 23 of Florida's 1,200 miles of shoreline were closed to fishing, and 90 percent of the state's beaches remained untouched by the BP oil spill disaster.
- Sixteen percent of respondents to a national survey incorrectly believed that there was oil on west coast Florida beaches from St. Petersburg to the Florida Keys (Trigaux, 2010).

Hillsborough County, Florida

2011 Population: 1,267,775 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	19.6	19.0	19.1	18.8	19.4	19.2	19.0	20.1
Payroll ($M)	$107.7	$104.9	$133.9	$111.3	$106.8	$109.6	$131.6	$123.1
Establishments	1,085	1,101	1,102	1,099	1,104	1,098	1,103	1,106

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 7,698
- Individual: 7,170
- Business: 528

Value of Claims

- Total Claims: $43M
- Individual: $35.4M
- Business: $7.6M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Hotel/Motel/Bed & Breakfast
- Resort

Field Interview Findings

- The west coast of Florida suffered more from public perception issues about the impacts of the oil spill on the quality of seafood and the cleanliness of beaches than from direct impacts such as tar balls arriving on shore.
- The restaurant sector was hit particularly hard on the west coast of the state (as affirmed by the GCCF data analysis of county industry sectors appearing to the left).

Tourism Bureaus and Newspapers Reviews

- The review of newspapers and websites reveals that counties relying heavily on the resort industry, such as Hillsborough County, often promoted resorts, hotels, and restaurants more than natural or wildlife attractions.

Jefferson County, Florida

2011 Population: 14,658 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.04	0.04	0.04	0.04	0.04	0.01	0.01	0.04
Payroll ($M)	$0.11	$0.11	$0.12	$0.11	$0.13	$0.05	$0.05	$0.12
Establishments	12	12	12	12	13	13	12	12

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 12
- Individual: 2
- Business: 10

Value of Claims

- Total Claims: $83,000
- Individual: -
- Business: $83,000

Most heavily impacted industry sectors

- Charter Fishing

Field Interview Findings

- The direct impacts of the spill were felt most in the four northernmost counties in the panhandle of Florida, and the other areas, such as Jefferson County, mainly suffered perception-based issues.

Tourism Bureaus and Newspapers Reviews

- Jefferson County was not identified by name in the review of websites and newspaper articles, however, statewide information indicates that the majority of the counties focused on highlighting their beaches. Although counties often included "safety" as a topic, none of them mentioned any concerns related to lingering effects of the oil spill.

Lee County, Florida

2011 Population: 631,330 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	10.9	10.0	5.3	10.1	10.5	10.3	9.5	10.9
Payroll ($M)	$63.0	$56.7	$60.8	$56.9	$60.0	$54.3	$55.1	$61.6
Establishments	650	665	658	656	670	661	666	662

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 5,973
- Individual: 4,768
- Business: 1,205

Value of Claims

- Total Claims: $43.8M
- Individual: $25.6M
- Business: $18.2M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Hotel/Motel/Bed & Breakfast
- Resort

Field Interview Findings

- Tourism Development Councils on the west and southwest coast of Florida tried to highlight the lack of oil on their beaches to combat the public perception that all of Florida was covered in oil.
- In Lee County, the oil spill, combined with economic effects of the recession, caused consumer surplus dollars to be shifted away from recreational boating and marine industries. The marine trades industries were also directly affected by the increased price of oil following the spill (i.e., fuel for vessels).
- The county is seeing a slow return to the activity of recreational boating.

Tourism Bureaus and Newspapers Reviews

- Lee County collected an extra $3 million in tax revenue for 2010-11. That is a decrease in revenue collected compared to 2009-10, but more than expected. Three basic reasons why the county drew more tax dollars this year than expected: less worry about the oil spill, the devalued American dollar is attractive to foreign visitors, and successful summer programs like the North American Roller Hockey Championships (Gillis, 2011).

Levy County, Florida

2011 Population: 40,156 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.3	0.2	0.2	0.3	0.3	0.2	0.2	0.3
Payroll ($M)	$1.1	$0.9	$1.0	$0.9	$0.9	$0.9	$0.9	$1.0
Establishments	44	44	44	43	42	42	40	42

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 322
- Individual: 90
- Business: 232

Value of Claims

- Total Claims: $539,589
- Individual: $37,900
- Business: $501,689

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Hotel/Motel/Bed & Breakfast
- Sight-seeing Tour or Pleasure Cruise Boat Operator

Field Interview Findings

- Like much of the west coast of Florida, Levy County was not directly impacted by the oil spill, but rather they faced indirect impacts such as public perception issues about the cleanliness of area beaches and the quality of Gulf seafood.
- Restaurants were one of the most heavily impacted industry sectors among the counties lining the west coast of the state.

Tourism Bureaus and Newspapers Reviews

- Following the oil spill, Levy County estimated that the annual bed tax collected was close to their typical annual estimate for the tax—likely because they had tourists that normally would have gone to Destin (Jones, 2010). Treasure Island picked up reservations from Pensacola and Destin Beach (Steele, 2010).

Manatee County, Florida

2011 Population: 327,142 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	3.7	3.3	3.5	3.8	3.8	3.6	3.6	3.8
Payroll ($M)	$19.0	$17.1	$19.7	$19.6	$20.6	$19.0	$20.7	$20.0
Establishments	276	282	288	285	287	290	300	296

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 1,605
- Individual: 1,244
- Business: 361

Value of Claims

- Total Claims: $12.3M
- Individual: $7.1M
- Business: $5.2M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Resort
- Hotel/Motel/Bed & Breakfast

Field Interview Findings

- While interviews were not conducted with individuals from Manatee County, nearby county interviewees cited the indirect impacts of the oil spill (e.g., dealing with negative public perception, decrease in consumer purchases of marine products) as being greater than any direct impacts from the spill.

Tourism Bureaus and Newspapers Reviews

- Manatee County's occupancy rates declined slightly for three straight months after the oil spill. June occupancy declined 1.4 percent in Manatee County, July dropped 0.6 percent, and August declined 1.9 percent. September rebounded with a 2.4 percent increase (Gagliano, Oct. 2010).
- Bolstering a widespread theory that visitors bypassed the oil-stricken Panhandle for southwest Florida, Manatee County had almost 3,000 more visitors compared to the same three-month period last year (2009). Slightly more than a third of the visitors were from Florida, up nearly 3 percent from the same period last year, followed by the Midwest (18.2 percent) and the Northeast (17 percent). The most popular draw, by a 93.6 percent response, was the beach. But Visit Florida warned that the statistics mask lost business with a study finding that travelers were 22 percent less likely to visit the Sarasota/Brearea in July and August because of the oil spill (Lane, Sept. 2010).

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Monroe County, Florida

2011 Population: 73,873 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	6.3	5.9	6.1	6.6	6.8	6.4	6.6	7.1
Payroll ($M)	$45.3	$41.8	$45.7	$47.0	$49.8	$45.6	$53.2	$50.8
Establishments	447	455	457	452	459	451	457	457

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 10,604
- Individual: 6,541
- Business: 4,063

Value of Claims

- Total Claims: $86.7M
- Individual: $30.3M
- Business: $56.3M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Charter Fishing
- Hotel/Motel/Bed & Breakfast

Field Interview Findings

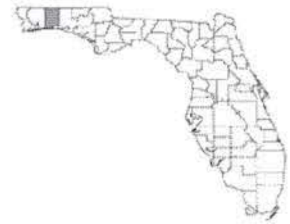
- While interviews were not conducted with individuals from Monroe County, nearby county interviewees cited the indirect impacts of the oil spill (e.g., dealing with negative public perception, decrease in consumer purchases of marine products) as being greater than any direct impacts from the spill.

Tourism Bureaus and Newspapers Reviews

- Counties on the southwest coast of the state, such as Monroe County, faced indirect impacts from the oil spill rather than direct impacts. For example, one newspaper article state, "A slick on Pensacola's beaches could curtail tourism as far away as Miami, since many overseas visitors will hear "Florida beaches hit with oil" and not make the distinction between particular locations" (Huettel and Albright, 2010).

Okaloosa County, Florida

2011 Population: 183,482 (source: U.S. Census Bureau)



Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	3.6	3.6	3.0	3.3	3.9	3.7	3.0	3.1
Payroll ($M)	$15.3	$16.4	$13.3	$13.9	$18.1	$18.0	$13.9	$13.0
Establishments	272	274	276	275	283	279	283	285

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 33,072
- Individual: 21,155
- Business: 11,917

Value of Claims

- Total Claims: $188M
- Individual: $89.8M
- Business: $98.3M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Hotel/Motel/Bed & Breakfast
- Resort

Field Interview Findings

- Okaloosa County was one of the four northernmost Florida counties that received direct impacts (e.g. tar balls) from the oil spill.
- A tourism official from the Northwest Florida Tourism Council (of which Okaloosa County is a member—see text box below) stated that for the Northwest, the biggest damage was caused by perception among tourists caused by the national media. For example, the portrayal of the amount of oil covering these counties was inaccurate.

Tourism Bureaus and Newspapers Reviews

- Tourism officials in Okaloosa County, along with Gulf, Escambia, Santa Rosa, Okaloosa, Walton, Bay and Franklin counties, formed the North Florida Tourism Development Council coalition and confronted BP after tourism in those counties had dropped for the early summer season of 2010 due to the fear that oil would impact their coastline (Dean, Sept 2010).
- The BP money allowed seven area tourism bureaus to try promotions they could never have afforded otherwise. and it has propelled the Panhandle's visitor counts to record numbers. The BP money was more than triple the tourism promotion funds normally spent by officials in Okaloosa County. (Schneider and Nelson, 2011).

Pasco County, Florida

2011 Population: 466,457 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	3.6	3.4	3.3	3.5	3.6	3.4	3.5	3.7
Payroll ($M)	$15.3	$14.4	$15.0	$14.2	$15.2	$14.6	$15.6	$15.4
Establishments	279	284	284	294	298	294	296	307

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 901
- Individual: 580
- Business: 321

Value of Claims

- Total Claims: $6.1M
- Individual: $3M
- Business: $3M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Hotel/Motel/Bed & Breakfast
- Charter Fishing

Field Interview Findings

- The west coast of Florida suffered more from public perception issues about the impacts of the oil spill on the quality of seafood and the cleanliness of beaches than from direct impacts such as tar balls arriving on shore.
- The restaurant sector was hit particularly hard on the west coast of the state (as affirmed by the GCC data analysis of county industry sectors appearing to the left).

Tourism Bureaus and Newspapers Reviews

- Pasco County was not identified by name in the review of websites and newspaper articles, however, statewide information indicates that the majority of the counties focused on highlighting their beaches. Although counties often included "safety" as a topic, none of them mentioned any concerns related to lingering effects of the oil spill.

Pinellas County, Florida

2011 Population: 917,398 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	17.2	16.1	15.8	16.1	16.9	16.3	16.0	16.4
Payroll ($M)	$97.7	$94.4	$94.5	$84.8	$100.7	$99.4	$93.4	$88.2
Establishments	1,083	1,087	1,091	1,065	1,078	1,070	1,075	1,063

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 15,985
- Individual: 12,905
- Business: 3,080

Value of Claims

- Total Claims: $104M
- Individual: $63.4M
- Business: $40.6M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Hotel/Motel/Bed & Breakfast
- Resort

Field Interview Findings

- Pinellas County faced indirect impacts of the oil spill (such as negative public perception) rather than direct impacts from oil. Tourism officials tried to highlight the lack of oil on their beaches to combat the public perception that all of FL was covered in oil. As a marketing tactic, they also tried to increase visitors from within the state who had a greater awareness of which areas had actually been impacted by oil.

Tourism Bureaus and Newspapers Reviews

- Prior to the spill, the number of visitors to Pinellas County was down with 2009 being the first year since 2003 that the number of annual visitors to the county dropped below 5 million. That decrease reflected a nationwide decline in travel due to rising unemployment and general economic conditions (Huettle, 2010).
- For Pinellas County, people can see local beach conditions in real time via webcams. Hotels offered "Book with Confidence", which promises visitors that their first night will be free if they find any signs of oil on the county's beaches (Porter, 2010; Lane, July 2010).
- Pinellas tourism officials used $1.1 million from BP in summer of 2010 for ads to attract Floridians, who knew most of the state's west coast was oil-free. It worked: One-third of all domestic visitors in July came from Florida, the highest percentage in three years (Huettle, Sept. 2010). Tourism revenues for 2011 improved over 2010 levels, but still lagged behind the robust years of 2007 and 2008, according to receipts from Pinellas tourist tax (Decamp, 2011).

Santa Rosa County, Florida

2011 Population: 154,104 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	1.2	1.2	1.1	1.1	1.2	1.2	1.2	1.2
Payroll ($M)	$4.5	$4.5	$4.5	$4.1	$4.6	$4.7	$4.8	$4.1
Establishments	98	99	100	102	102	101	102	99

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 9,434
- Individual: 5,568
- Business: 3,866

Value of Claims

- Total Claims: $58.4M
- Individual: $24.4M
- Business: $34M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Hotel/Motel/Bed & Breakfast
- Bar

Field Interview Findings

- Santa Rosa was one of the four northernmost Florida counties that received direct impacts (e.g. tar balls) from the oil spill.
- A tourism official from the Northwest Florida Tourism Council (of which Santa Rosa County is a member—see text box below) stated that for the Northwest, the biggest perception damage suffered was from the national media. For example, the portrayal of the amount of oil covering these counties was inaccurate.
- There is uncertainty about what the tourism sector will look like when the additional BP tourism funding disappears.

Tourism Bureaus and Newspapers Reviews

- Tourism officials in Santa Rosa County, along with Gulf, Escambia, Okaloosa, Walton, Bay and Franklin counties formed the North Florida Tourism Development Council coalition and confronted BP after tourism in those counties had dropped for the early summer season of 2010 due to the fear that oil would impact their coastline (Dean, Sept 2010).
- By June 2011 bed tax collections were up 38.33 percent in Santa Rosa County compared to June 2010. (Ricketts, Aug 2011).

Sarasota County, Florida

2011 Population: 382,213 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	6.7	6.3	6.5	5.6	6.5	6.1	6.2	6.7
Payroll ($M)	$39.6	$36.2	$39.6	$37.9	$37.5	$35.4	$37.7	$39.4
Establishments	416	429	433	420	424	418	420	414

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 2,110
- Individual: 1,671
- Business: 439

Value of Claims

- Total Claims: $19.8M
- Individual: $11.9M
- Business: $7.9M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Hotel/Motel/Bed & Breakfast
- Charter Fishing

Field Interview Findings

- The west coast of Florida suffered more from public perception issues about the impacts of the oil spill on the quality of seafood and the cleanliness of beaches than from direct impacts such as tar balls arriving on shore.
- The restaurant sector was hit particularly hard on the west coast of the state (as affirmed by the GCCF data analysis of county industry sectors appearing to the left).

Tourism Bureaus and Newspapers Reviews

- A national survey of northern tourists showed 20 percent of them believed Sarasota was impacted by oil, another 6.7 percent believed local beaches were severely impacted, and 13 percent were unsure, even though no oil came close to the coastline (Barron, 2010).
- In 2011, Sarasota County experienced its best summer for tourism tax revenues.

Taylor County, Florida

2011 Population: 22,691 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Payroll ($M)	$0.7	$0.7	$0.7	$0.7	$0.8	$0.8	$0.8	$0.7
Establishments	22	22	22	23	24	24	24	25

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 130
- Individual: 38
- Business: 92

Value of Claims

- Total Claims: $1.4M
- Individual: $12,600
- Business: $1.4M

Most heavily impacted industry sectors

- Hotel/Motel/Bed & Breakfast
- Restaurant/Bakery/Food Stand
- Resort

Field Interview Findings

- The direct impacts of the spill were felt most in the four northernmost counties in the panhandle of Florida, and the other areas, such as Taylor County, mainly suffered perception-based issues.

Tourism Bureaus and Newspapers Reviews

- Taylor County was not explicitly mentioned in the websites and newspaper articles reviewed, however, statewide findings indicated that the most important factor in keeping tourists coming to Florida was conveying accurate and up-to-the-minute information (Walton Sun, 2010).

Wakulla County, Florida

2011 Population: 30,978 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.02
Payroll ($M)	$0.13	$0.14	$0.13	$0.12	$0.13	$0.14	$0.14	$0.10
Establishments	16	16	16	16	16	16	16	16

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 826
- Individual: 409
- Business: 417

Value of Claims

- Total Claims: $3.8M
- Individual: $948,510
- Business: $2.9M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Charter Fishing
- Snorkeling and Diving Tour Provider

Field Interview Findings

- Field interviews did not explicitly address the oil spill impacts on Wakulla County, however, an interviewee from the Northwest Florida Tourism Council noted that the direct impacts of the spill were felt most in the four northernmost counties in Northwest FL, and the other areas mainly suffered perception-based issues.

Tourism Bureaus and Newspapers Reviews

- Wakulla County was not identified by name in the review of websites and newspaper articles; however, statewide information indicates that the majority of the counties focused on highlighting their beaches. Although counties often included "safety" as a topic, none of them mentioned any concerns related to lingering effects of the oil spill.

Walton County, Florida

2011 Population: 55,793 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	2.3	2.3	1.8	1.9	2.3	2.2	1.8	2.0
Payroll ($M)	$13.3	$15.5	$11.5	$11.1	$14.4	$15.5	$12.4	$12.0
Establishments	89	94	94	99	101	100	99	100

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 15,976
- Individual: 9,520
- Business: 6,456

Value of Claims

- Total Claims: $84.2M
- Individual: $43M
- Business: $41.2M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Resort
- Hotel/Motel/Bed & Breakfast

Field Interview Findings

- When the spill occurred, there were unclear leadership chains amongst the differing agencies, and directives/approvals were given from one agency, just to be counteracted by another agency.
- The dwindling numbers of tourists combined with concerns over the quality of seafood caused some restaurants to close before they were able to receive BP funds that would have enabled them to remain in business.
- The BP funds that were spent on tourism advertising showed up directly in the region's revenues, and South Walton has seen 15 months of double-digit increases over 2010 revenues.

Tourism Bureaus and Newspapers Reviews

- Walton County was one of four Florida counties that were most directly impacted by the oil spill, with oil reaching the county's shores.
- 422 tourists who vacationed in Walton County in 2009 but did not return in 2010 were surveyed. More than 50 percent of the respondents blamed the oil spill for them not visiting in 2010, and more than 20 percent of those surveyed believe the beaches continue to be affected by the spill in January 2011. (Ricketts, Jan 2011).
- Walton County was one of seven northwest Florida counties that joined together to form the North Florida Tourism Development Council coalition to confront BP after tourism in those counties had dropped for the early summer season of 2010 due to the fear of oil impacting their coastline (Dean, Sept 2010).

Washington County, Florida

2011 Population: 24,935 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Payroll ($M)	$0.3	$0.3	$0.2	$0.2	$0.3	$0.3	$0.3	$0.2
Establishments	21	20	21	20	20	20	20	19

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 206
- Individual: 107
- Business: 99

Value of Claims

- Total Claims: $566,526
- Individual: $221,527
- Business: $344,999

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Hotel/Motel/Bed & Breakfast
- Campground and RV Park

Field Interview Findings

- Although Washington County was not explicitly addressed through field interviews, the county is just east of the four Florida counties that were directly impacted by the oil spill. Interviewees from those nearby counties indicated that counties east of the directly impacted areas, such as Washington County, primarily suffered from public perception issues surrounding the oil spill.

Tourism Bureaus and Newspapers Reviews

- Washington County was not highlighted in the newspaper articles and websites reviewed; however, statewide findings indicate that northwest Florida restaurants and hotels were two industries that were greatly impacted by the oil spill. For example, the Florida Restaurant & Lodging Association reported that occupancy rates were down for Memorial Day weekend in the northwest panhandle, and, when comparing revenues from May through September 2009 to the same period in 2010, taxable sales in tourist-sensitive categories such as lodging, restaurants, bars, and amusement and recreation fell significantly in northwest Florida at a time when the same categories increased statewide (Huettle, 2010; Gulf Breezes, Dec. 2010).

Calcasieu Parish, Louisiana

2011 Population: 194,092 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	5.9	6.0	5.9	5.8	5.9	5.8	5.7	5.6
Payroll ($M)	$33.2	$38.7	$34.5	$38.6	$33.2	$38.4	$33.0	$36.6
Establishments	179	180	182	184	186	187	180	185

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 347
- Individual: 200
- Business: 147

Value of Claims

- Total Claims: $3.3M
- Individual: $209,127
- Business: $3.1M

Most heavily impacted industry sectors

- Hotel/Motel/Bed & Breakfast
- Restaurant/Bakery/Food Stand
- Boat Seller

Field Interview Findings

- Field interviews did not specifically address Calcasieu Parish, however, general findings from field interviews indicate that the oil spill prompted the tourism economy to expand and diversify
- Several business interviewees cited their return customer base as a reason for being able to sustain business following the spill.

Tourism Bureaus and Newspapers Reviews

- Calcasieu Parish was not specifically named in the newspaper articles and websites reviewed; however, state level findings reveal that the oil spill impacted tourism levels throughout the state. For example, a study indicated that about 26 percent of the visitors who had booked trips in 2010 canceled or postponed them because of the spill. It also said that the state is projected to lose almost $300 million in tourism spending through 2013 as a result of the disaster (Anderson, 2011).

Cameron Parish, Louisiana

2011 Population: 6,730 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.08	0.08	0.00	0.08	0.08	0.08	0.08	0.07
Payroll ($M)	$1.5	$1.4	$0.01	$1.4	$1.7	$1.4	$1.5	$1.2
Establishments	8	8	8	9	9	9	9	9

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 400
- Individual: 159
- Business: 241

Value of Claims

- Total Claims: $501,841
- Individual: -
- Business: $501,841

Most heavily impacted industry sectors

- Hotel/Motel/Bed & Breakfast
- Restaurant/Bakery/Food Stand
- Wildlife or Bird Watching Guides or Tours

Field Interview Findings

- Field interviews did not specifically address Cameron Parish, however, general findings from field interviews indicate that the media was a negative influence in shaping public perception associated with the spill, a public perception that some businesses are still struggling to overcome.
- General interview findings also indicate that the oil spill prompted the tourism economy to expand and diversity.

Tourism Bureaus and Newspapers Reviews

- Cameron Parish was not specifically named in the newspaper articles and websites reviewed, however, state level findings reveal that seventeen percent of potential regional tourists indicated they have canceled or delayed a trip to Louisiana because of the oil spill. The May 2010 national survey indicated that 79 percent of the possible tourists believe the oil-spill problems will linger for at least two years (Anderson, July 2010).
- Nature-based tourism businesses, such as swamp tour operators and charter fishermen were hard hit (Buskey, 2010).

Iberia Parish, Louisiana

2011 Population: 73,400 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.6	0.6	0.6	0.5	0.5	0.5	0.5	0.5
Payroll ($M)	$1.9	$1.9	$1.9	$1.7	$2.0	$1.9	$1.9	$1.8
Establishments	45	46	46	47	45	46	43	46

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 946
- Individual: 568
- Business: 378

Value of Claims

- Total Claims: $2.8M
- Individual: $396,218
- Business: $2.4M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Hotel/Motel/Bed & Breakfast
- Charter Fishing

Field Interview Findings

- Field interviews did not specifically address Iberia Parish, however, general findings from field interviews indicate that the oil spill prompted the tourism economy to expand and diversify
- General interview findings also indicate that the media was a negative influence in shaping public perception associated with the spill; a public perception that some businesses are still struggling to overcome.

Tourism Bureaus and Newspapers Reviews

- Iberia Parish was not specifically named in the newspaper articles and web sites reviewed; however, state level findings reveal that the oil spill impacted tourism levels throughout the state. For example, a study indicated that about 26 percent of the visitors who had booked trips in 2010 canceled or postponed them because of the spill. It also said that the state is projected to lose almost $300 million in tourism spending through 2013 as a result of the disaster (Anderson, 2011).

Jefferson Parish, Louisiana

2011 Population: 432,640 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	7.0	7.0	7.0	6.9	7.3	7.2	7.1	7.1
Payroll ($M)	$40.8	$44.2	$66.0	$54.8	$46.8	$48.7	$70.9	$49.7
Establishments	449	461	464	474	480	486	465	461

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 36,282
- Individual: 29,124
- Business: 7,158

Value of Claims

- Total Claims: $131.7M
- Individual: $89.5M
- Business: $42.3M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Hotel/Motel/Bed & Breakfast
- Charter Fishing

Field Interview Findings

- Field interviews did not specifically address Jefferson Parish, however, general findings from field interviews indicate that some businesses that fared relatively better than other, similar businesses (e.g. charter operators) cited their return customer base as a reason for being able to sustain business following the spill.
- General interview findings also indicate that the media was a negative influences in shaping public perception associated with the spill; a public perception that some businesses are still struggling to overcome.

Tourism Bureaus and Newspapers Reviews

- All offshore fishing was closed in Lafourche, Terrebonne, and Jefferson parishes and inshore fishing around Grand Isle and southern Lafourche Parish were also off limits because of the spill. Several inshore fishing areas in Terrebonne Parish also remained closed in late 2010 (St. Germain, 2010).

Lafayette Parish, Louisiana

2011 Population: 224,390 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	4.2	4.1	4.0	4.0	4.2	4.1	4.0	3.9
Payroll ($M)	$17.5	$16.9	$17.5	$16.8	$18.3	$18.2	$19.1	$16.4
Establishments	241	243	246	248	250	258	248	247

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 721
- Individual: 472
- Business: 249

Value of Claims

- Total Claims: $4.1M
- Individual: $376,628
- Business: $3.7M

Most heavily impacted industry sectors

- Hotel/Motel/Bed & Breakfast
- Restaurant/Bakery/Food Stand
- Bar

Field Interview Findings

- Field interviews did not specifically address Lafourche Parish, however, general findings from field interviews indicate that the oil spill prompted the tourism economy to expand and diversify.
- General findings from field interviews indicate that some businesses that fared relatively better than other, similar businesses (e.g. charter operators) cited their return customer base as a reason for being able to sustain business following the spill.

Tourism Bureaus and Newspapers Reviews

- Lafayette Parish was not specifically named in the newspaper articles and websites reviewed; however, state-level findings reveal that the oil spill impacted tourism levels throughout the state. For example, a study indicated that about 26 percent of the visitors who had booked trips in 2010 canceled or postponed them because of the spill. It also said that the state is projected to lose almost $300 million in tourism spending through 2013 as a result of the disaster (Anderson, 2011).

Lafourche Parish, Louisiana

2011 Population: 96,666 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.8	0.8	0.8	0.8	0.8	0.9	0.8	0.8
Payroll ($M)	$3.1	$3.3	$4.1	$4.7	$4.8	$4.9	$5.0	$3.4
Establishments	75	77	78	79	79	79	76	78

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 3,528
- Individual: 1,925
- Business: 1,603

Value of Claims

- Total Claims: $13.7M
- Individual: $2.4M
- Business: $11.3M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Hotel/Motel/Bed & Breakfast
- Charter Fishing

Field Interview Findings

- The spill prompted the tourism economy to expand and diversify. The spill also caused people to work collaboratively, such as form coalitions (e.g., Gulf Coast Alliance for Economic and Environmental Resilience).
- While restaurants faced consumer concerns about wholesomeness of product about a month after the spill occurred, the business found that once people came through the door of a restaurant, they trusted the restaurateur to provide a wholesome product.

Tourism Bureaus and Newspapers Reviews

- In 2008, tourists spent $78 million in Lafourche parish and $115 million in Terrebonne parish on area festivals, swamp tours and fishing trips, among other attractions. A study showed saltwater anglers alone spent $258.7 million on the sport in 2001, and the industry generated $527.7 million for Louisiana businesses (Schmidt, Feb. 2011).
- All offshore fishing was closed in Lafourche, Terrebonne, and Jefferson parishes and inshore fishing around Grand Isle and southern Lafourche Parish was also off limits because of the spill. Several inshore fishing areas in Terrebonne Parish also remained closed in late 2010 (St. Germain, 2010).

Orleans Parish, Louisiana

2011 Population: 360,740 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	15.9	15.4	16.0	16.1	16.3	16.3	16.8	17.1
Payroll ($M)	$113.8	$108.6	$124.2	$120.6	$119.9	$117.5	$132.1	$132.5
Establishments	500	510	522	533	555	562	550	562

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 49,576
- Individual: 44,323
- Business: 5,353

Value of Claims

- Total Claims: $268.6M
- Individual: $223M
- Business: $45.6M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Hotel/Motel/Bed & Breakfast
- Bar

Field Interview Findings

- Field interviews did not specifically address Lafayette Parish, however, general findings from field interviews indicate that the oil spill prompted the tourism economy to expand and diversify
- General interview findings also indicate that the media was a negative influence in shaping public perception associated with the spill; a public perception that some businesses are still struggling to overcome.

Tourism Bureaus and Newspapers Reviews

- New Orleans still viewed as recovering from Hurricane Katrina (Foster, 2011).
- The city of New Orleans and neighboring parishes experienced an economic boom in the wake of the oil spill. Hotel occupancy and sales tax revenues were up in the New Orleans area (Times-Pic, 2011).
- New Orleans' hospitality industry was largely unscathed by the spill (Albright, June 2010).

Plaquemines Parish, Louisiana

2011 Population: 23,628 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.3	0.3	0.3	0.3	0.4	0.4	0.4	0.4
Payroll ($M)	$2.2	$2.3	$2.4	$2.1	$3.8	$3.9	$4.2	$3.8
Establishments	32	32	33	33	35	36	33	36

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 3,838
- Individual: 1,930
- Business: 1,908

Value of Claims

- Total Claims: $12M
- Individual: $2.4M
- Business: $9.6M

Most heavily impacted industry sectors

- Charter Fishing
- Restaurant/Bakery/Food Stand
- Marina/Dock/Ice Houses

Field Interview Findings

- Field interviews did not specifically address Plaquemines Parish, however, general findings from field interviews indicate that some businesses that fared relatively better than other, similar businesses (e.g. charter operators) cited their return customer base as a reason for being able to sustain business following the spill.
- General interview findings also indicate that the media was a negative influence in shaping public perception associated with the spill; a public perception that some businesses are still struggling to overcome.

Tourism Bureaus and Newspapers Reviews

- Plaquemines Parish was not specifically named in the newspaper articles and websites reviewed, however, state level findings reveal that 17 percent of potential regional tourists indicated they have canceled or delayed a trip to Louisiana because of the oil spill. The May 2010 national survey indicated that 79 percent of the possible tourists believe the oil spill problems will linger for at least two years (Anderson, July 2010).

St. Bernard Parish, Louisiana

2011 Population: 39,558 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Payroll ($M)	$0.4	$0.4	$0.3	$0.4	$0.4	$0.4	$0.5	$0.4
Establishments	22	22	22	23	24	25	24	25

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 3,395
- Individual: 1,970
- Business: 1,425

Value of Claims

- Total Claims: $8.9M
- Individual: $3.4M
- Business: $5.5M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Charter Fishing
- Marina/Dock/Ice Houses

Field Interview Findings

- Field interviews did not specifically address St. Bernard Parish, however, general findings from field interviews indicate that some businesses that fared relatively better than other, similar businesses (e.g. charter operators) cited their return customer base as a reason for being able to sustain business following the spill.
- General interview findings also indicate that the media was a negative influence in shaping public perception associated with the spill; a public perception that some businesses are still struggling to overcome.

Tourism Bureaus and Newspapers Reviews

- St. Bernard Parish was not specifically named in the newspaper articles and websites reviewed; however, state-level findings reveal that the oil spill impacted tourism levels throughout the state. For example, a study indicated that about 26 percent of the visitors who had booked trips in 2010 canceled or postponed them because of the spill. It also said that the state is projected to lose almost $300 million in tourism spending through 2013 as a result of the disaster (Anderson, 2011).

St. Charles Parish, Louisiana

2011 Population: 52,517 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.3	0.3	0.3	0.3	0.3	0.4	0.3	0.3
Payroll ($M)	$1.0	$1.3	$1.3	$1.1	$1.2	$1.3	$1.3	$1.2
Establishments	39	39	39	40	41	42	40	39

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 1,969
- Individual: 1,494
- Business: 475

Value of Claims

- Total Claims: $6.6M
- Individual: $2.8M
- Business: $3.9M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Hotel/Motel/Bed & Breakfast
- Charter Fishing

Field Interview Findings

- Field interviews did not specifically address St. Charles Parish, however, general findings from field interviews indicate that the oil spill prompted the tourism economy to expand and diversify.
- General findings from field interviews indicate that some businesses that fared relatively better than other, similar businesses (e.g. charter operators) cited their return customer base as a reason for being able to sustain business following the spill.

Tourism Bureaus and Newspapers Reviews

- St. Charles Parish was not specifically named in the newspaper articles and websites reviewed, however, state-level findings reveal that 17 percent of potential regional tourists indicated they have canceled or delayed a trip to Louisiana because of the oil spill. The May 2010 national survey indicated that 79 percent of the possible tourists believe the oil-spill problems will linger for at least two years (Anderson, July 2010).

St. John the Baptist Parish, Louisiana

2011 Population: 45,221 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5
Payroll ($M)	$1.8	$1.8	$2.0	$1.8	$1.9	$1.7	$2.0	$1.8
Establishments	36	36	36	38	38	38	36	37

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 1,562
- Individual: 1,319
- Business: 243

Value of Claims

- Total Claims: $7.5M
- Individual: $3.3M
- Business: $4.1M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Hotel/Motel/Bed & Breakfast
- Bar

Field Interview Findings

- Field interviews did not specifically address St. John the Baptist Parish, however, general findings from field interviews indicate that the oil spill prompted the tourism economy to expand and diversify
- General interview findings also indicate that the media was a negative influence in shaping public perception associated with the spill; a public perception that some businesses are still struggling to overcome.

Tourism Bureaus and Newspapers Reviews

- St. John the Baptist Parish was not specifically named in the newspaper articles and websites reviewed, however, state-level findings reveal that the oil spill impacted tourism levels throughout the state. For example, a study indicated that about 26 percent of the visitors who had booked trips in 2010 canceled or postponed them because of the spill. It also said that the state is projected to lose almost $300 million in tourism spending through 2013 as a result of the disaster (Anderson, 2011).

St. Mary Parish, Louisiana

2011 Population: 54,210 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.9	0.7	0.7	0.7	0.7	0.8	0.8	0.8
Payroll ($M)	$5.2	$3.4	$3.3	$2.9	$3.4	$3.6	$3.4	$3.3
Establishments	51	52	53	55	54	56	55	58

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 1,671
- Individual: 1,073
- Business: 598

Value of Claims

- Total Claims: $3.5M
- Individual: $1.2M
- Business: $2.3M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Marina/Dock/Ice Houses
- Boat Rental/Leasing

Field Interview Findings

- Field interviews did not specifically address St. Mary Parish, however, general findings from field interviews indicate that the oil spill prompted the tourism economy to expand and diversify
- General findings from field interviews indicate that some businesses that fared relatively better than other, similar businesses (e.g. charter operators) cited their return customer base as a reason for being able to sustain business following the spill.

Tourism Bureaus and Newspapers Reviews

- St. Mary Parish was not specifically named in the newspaper articles and websites reviewed, however, state level-findings reveal that nature-based tourism businesses charter fishermen were hard hit by the oil spill (Buskey, 2010)
- At the state level, a study indicated that about 26 percent of the visitors who had booked trips in 2010 canceled or postponed them because of the spill. It also said that the state is projected to lose almost $300 million in tourism spending through 2013 as a result of the disaster (Anderson. 2011).

St. Tammany Parish, Louisiana

2011 Population: 236,785 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	2.6	2.7	2.5	2.5	2.7	2.7	2.6	2.6
Payroll ($M)	$10.2	$10.6	$10.1	$9.5	$10.2	$10.7	$10.8	$10.4
Establishments	192	198	201	204	210	214	210	206

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 6,618
- Individual: 4,669
- Business: 1,949

Value of Claims

- Total Claims: $35.7M
- Individual: $15.6M
- Business: $20.1M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Hotel/Motel/Bed & Breakfast
- Charter Fishing

Field Interview Findings

- Field interviews did not specifically address St. Tammany Parish, however, general findings from field interviews attribute the media with being a negative influence in shaping public perception associated with the spill; a public perception that some businesses are still struggling to overcome.
- General interview findings also indicate that the oil spill prompted the tourism economy to expand and diversify.

Tourism Bureaus and Newspapers Reviews

- St. Tammany Parish was not specifically named in the newspaper articles and websites reviewed, however, state level findings reveal that seventeen percent of potential regional tourists indicated they have canceled or delayed a trip to Louisiana because of the oil spill. The May 2010 national survey indicated that 79 percent of the possible tourists believe the oil-spill problems will linger for at least two years (Anderson, July 2010).

Tangipahoa Parish, Louisiana

2011 Population: 122,571 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	1.2	1.3	1.2	1.2	1.2	1.3	1.2	1.2
Payroll ($M)	$3.9	$4.0	$3.9	$3.6	$4.1	$4.2	$4.3	$4.0
Establishments	98	99	100	104	105	106	104	104

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 449
- Individual: 259
- Business: 190

Value of Claims

- Total Claims: $2.3M
- Individual: $309,709
- Business: $2M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Campground and RV Park
- Hotel/Motel/Bed & Breakfast

Field Interview Findings

- Field interviews did not specifically address Tangipahoa Parish, however, general findings from field interviews indicate that the oil spill prompted the tourism economy to expand and diversify.
- General findings from field interviews attribute the media with being a negative influence in shaping public perception associated with the spill; a public perception that some businesses are still struggling to overcome.

Tourism Bureaus and Newspapers Reviews

- At the state level, a study indicated that about 26 percent of the visitors who had booked trips in 2010 canceled or postponed them because of the spill. It also said that the state is projected to lose almost $300 million in tourism spending through 2013 as a result of the disaster (Anderson, 2011).

Terrebonne Parish, Louisiana

2011 Population: 111,917 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	1.4	1.4	1.4	1.4	1.4	1.4	1.4	1.3
Payroll ($M)	$6.0	$6.1	$5.9	$5.5	$6.3	$7.0	$7.1	$5.5
Establishments	109	111	112	114	115	117	114	113

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 6,567
- Individual: 3,993
- Business: 2,574

Value of Claims

- Total Claims: $16.2M
- Individual: $4.9M
- Business: $11.4M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Charter Fishing
- Marina/Dock/Ice Houses

Field Interview Findings

- Dealing with the spill has better equipped some organizations with tools for responding to large-scale disasters (e.g., messaging, PR).
- Hotels did moderately good business following the spill; however, these businesses experienced a lot of wear and tear because the clean-up workers were longer-term stays than was typical.
- Interviewees commented that having BP claims granted was largely dependent on the quality of documentation that the business could provide, and certain businesses that tend to operate as more of a cash business were not able to produce the necessary documentation for their claims to be granted.

Tourism Bureaus and Newspapers Reviews

- All offshore fishing was closed in Lafourche, Terrebonne, and Jefferson parishes, and several inshore fishing areas in Terrebonne Parish also remained closed (St. Germain, 2010).
- Terrebonne's spring and summer tourism were significantly impacted by the spill. Those impacts are hard to quantify since spill response headquarters and crews stayed in the area, so traditional ways of estimating tourism levels, such as counting hotel vacancies, are misleading. Local hotels were so packed with BP contractors it was hard for anyone else to get a room (Buskey, 2010).

Vermillion Parish, Louisiana

2011 Population: 58,276 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Payroll ($M)	$1.0	$1.1	$1.1	$1.0	$1.0	$1.1	$1.2	$1.0
Establishments	34	35	36	37	37	38	36	35

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 1,476
- Individual: 1,000
- Business: 476

Value of Claims

- Total Claims: $2.6M
- Individual: $96,285
- Business: $2.5M

Most heavily impacted industry sectors

- Hotel/Motel/Bed & Breakfast
- Restaurant/Bakery/Food Stand
- Marina/Dock/Ice Houses

Field Interview Findings

- Field interviews did not specifically address Vermillion Parish, however, general findings from field interviews attribute the media with being a negative influence in shaping public perception associated with the spill; a public perception that some businesses are still struggling to overcome.
- General interview findings also indicate that some businesses that fared relatively better than other, similar businesses (e.g. charter operators) cited their return customer base as a reason for being able to sustain business following the spill.

Tourism Bureaus and Newspapers Reviews

- Vermillion Parish was not specifically named in the newspaper articles and websites reviewed, however, state level findings reveal that 17 percent of potential regional tourists indicated they have canceled or delayed a trip to Louisiana because of the oil spill. The May 2010 national survey indicated that 79 percent of the possible tourists believe the oil-spill problems will linger for at least two years (Anderson, July 2010).

Hancock County, Mississippi

2011 Population: 44,649 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009 Q2	2009 Q3	2009 Q4	2010 Q1	2010 Q2	2010 Q3	2010 Q4	2011 Q1
Employment (thousands)	1.3	1.3	0.3 [a]	1.2	1.2	1.2	0.3 [a]	0.3 [a]
Payroll ($M)	$8.0	$8.4	$2.0	$7.2	$7.4	$8.1	$1.9	$1.7
Establishments	38	37	36	33	33	33	34	34

[a] The data for these quarters were affected by non-disclosure of data in the hotel and restaurant industries in these quarters.

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 2,882
- Individual: 1,738
- Business: 1,144

Value of Claims

- Total Claims: $10.8M
- Individual: $4.5M
- Business: $6.4M

Most heavily impacted industry sectors

- Hotel/Motel/Bed & Breakfast
- Restaurant/Bakery/Food Stand
- Bar

Field Interview Findings

- Casinos are the largest sector of Mississippi's coastal tourism economy, and this industry fared well relative to the other tourism industries following the spill.
- The spill had farther reaching impacts on charter operators, restaurants, and attractions, many of which were just bouncing back from Katrina and the recession.
- The volume of clean-up workers following the spill caused the demand for rooms to stay high, while the price per room and overall hotel revenues were down.
- Interviewees mentioned that the spill helped them focus on the need to market the entire Mississippi coast as a destination rather than marketing specific locales or counties along the coast.

Tourism Bureaus and Newspapers Reviews

- The Hancock County Tourism Bureau Web page targets tourists rather than Highlighting DWH.

Harrison County, Mississippi

2011 Population: 191,040 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	
Employment (thousands)	11.8	11.7	11.3	11.1	11.6	11.7	11.2	11.2
Payroll ($M)	$76.2	$80.3	$73.2	$78.0	$74.6	$79.8	$77.1	$74.9
Establishments	193	195	195	195	197	200	200	201

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 21,723
- Individual: 17,168
- Business: 4,555

Value of Claims

- Total Claims: $88M
- Individual: $50.6M
- Business: $37.5M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Casino
- Hotel/Motel/Bed & Breakfast

Field Interview Findings

- Casinos are the largest sector of MS's coastal tourism economy, and this industry fared well relative to the other tourism industries following the spill (i.e., people's perception of oil on beaches didn't dissuade people from gaming at casinos). The spill had farther reaching impacts on charter operators, restaurants, and attractions, many of which were just bouncing back from Katrina and the recession.
- The MS tourist industry lagged the other Gulf States in its understanding of their own industry, and they lacked the statistical data and market research that FL, AL, and LA had available when the DWH disaster struck. When BP made marketing resources available to the Gulf States, MS lost valuable months before they were able to expend the money fruitfully.
- Interviewees mentioned that the spill helped them focus on the need to market the entire MS coast as a destination rather than marketing specific locales or counties along the coast.

Tourism Bureaus and Newspapers Reviews

- Harrison County wasn't explicitly mentioned in the newspaper articles reviewed, however, state-level findings indicate that there was no oil on MS beaches, but very few people were on the beaches or eating seafood (Hoffman, 2010).
- State-level findings also indicated the mid-term impacts of the Gulf oil spill of 2010 were unknown, but each of Mississippi's three coastal counties added jobs over the period March 2010 to March 2011 (Havens, 2011).

Jackson County, Mississippi

2011 Population: 139,901 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	1.4	1.4	1.3	1.4	1.5	1.4	1.4	1.4
Payroll ($M)	$5.2	$5.3	$4.9	$5.1	$5.4	$5.5	$5.6	$5.4
Establishments	118	119	118	117	118	117	120	120

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 6,887
- Individual: 5,045
- Business: 1,842

Value of Claims

- Total Claims: $25.4M
- Individual: $10.1M
- Business: $15.2M

Most heavily impacted industry sectors

- Restaurant/Bakery/Food Stand
- Hotel/Motel/Bed & Breakfast
- Charter Fishing

Field Interview Findings

- Casinos are the largest sector of MS's coastal tourism economy and this industry fared well relative to the other tourism industries following the spill (i.e., people's perception of oil on beaches didn't dissuade people from gaming at casinos). The spill had farther reaching impacts on charter operators, restaurants, and attractions, many of which were just bouncing back from Katrina and the recession.
- The MS tourist industry lagged the other Gulf States in its understanding of their own industry, and they lacked the statistical data and market research that FL, AL, and LA had available when the DWH disaster struck. When BP made marketing resources available to the Gulf States, MS lost valuable months before they were able to expend the money fruitfully.
- Interviewees mentioned that the spill helped them focus on the need to market the entire MS coast as a destination rather than marketing specific locales or counties along the coast.

Tourism Bureaus and Newspapers Reviews

- Jackson County Chamber of Commerce directed its natural resource activities tourism campaign towards both local and tourist audiences (Dumas, 2010). Natural resource activities and related events have become increasingly frequented over the year since the spill (Ruddiman, 2011).

Aransas County, Texas

2011 Population: 23,374 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.5	0.5	0.4	0.4	0.5	0.5	0.5	0.4
Payroll ($M)	$1.8	$1.8	$1.6	$1.4	$1.7	$1.8	$1.8	$1.4
Establishments	51	50	49	50	51	53	53	50

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 53
- Individual: 15
- Business: 38

Value of Claims

- Total Claims: $167,840
- Individual: -
- Business: $167,840

Most heavily impacted industry sectors

- Charter Fishing
- Hotel/Motel/Bed & Breakfast
- Restaurant/Bakery/Food Stand

Field Interview Findings

- The oil-spill impacts to Aransas County were not specifically addressed through field interviews, however, interviewees from nearby coastal counties indicated that the direct impacts of the spill were relatively minor. Indirect impacts included decreases in the volume of tourists and perception issues due to public uncertainty about the physical impacts of the spill, such as the flow of oil in the water and the beaches that were directly impacted.

Tourism Bureaus and Newspapers Reviews

- Although information for Aransas County was not made explicit through the review of newspapers and websites, state-level findings indicate that bird-watching and recreational fishing were common activities in most of Texas' coastal counties.
- State-level findings also indicate that Texan restaurants reported a DWH impact of higher seafood prices, which they felt could not be fully passed on to consumers, and an avoidance of seafood consumption due to fears of contamination (Elder, 2010; Rice and Patel, 2010).

Brazoria County, Texas

2011 Population: 319,973 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	2.2	2.2	2.2	2.1	2.2	2.2	2.2	2.2
Payroll ($M)	$8.9	$9.0	$9.0	$8.2	$8.8	$9.2	$9.2	$8.6
Establishments	169	168	168	170	172	173	172	171

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 136
- Individual: 59
- Business: 77

Value of Claims

- Total Claims: $641,531
- Individual: $77,206
- Business: $564,326

Most heavily impacted industry sectors

- Hotel/Motel/Bed & Breakfast
- Charter Fishing
- Boat Dealer

Field Interview Findings

- The oil spill impacts to Brazoria County were not specifically addressed through field interviews, however, interviewees from nearby Matagorda County indicated that the media was a negative influences in shaping public perception associated with the spill. Local CVBs responded to the negative perception through marketing efforts funded through their own marketing budgets.
- Officials in nearby counties also noted that a range of tourism industries were negatively impacted by the oil spill, including decreases in large boat sales, boat service and maintenance, hotel overnight occupancy rates, charter boats/fishing, and restaurants visitors.

Tourism Bureaus and Newspapers Reviews

- Brazoria County was not explicitly mentioned in the review of newspaper articles, however, state level findings indicate that bird-watching and recreation fishing was common themes in most of Texas' coastal counties.
- State level findings also indicate that Texan restaurants reported a DWH impact of higher seafood prices, which they felt could not be fully passed on to consumers, and an avoidance of seafood consumption due to fears of contamination (Elder, 2010; Rice and Patel, 2010).

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Calhoun County, Texas

2011 Population: 21,442 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.2	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Payroll ($M)	$0.6	$0.6	$0.6	$0.6	$0.7	$0.7	$0.7	$0.7
Establishments	25	26	25	26	25	26	26	30

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 85
- Individual: 38
- Business: 47

Value of Claims

- Total Claims: $16,156
- Individual: -
- Business: $16,156

Most heavily impacted industry sectors

- Charter Fishing

Field Interview Findings

- The oil spill impacts to Calhoun County were not specifically addressed through field interviews, however, interviewees from nearby coastal counties cited the media as being one of the most negative influences in shaping public perception associated with the spill.
- Interviewees from nearby counties also indicated that prior to the spill; the economy was negatively impacting tourism and the boating industry.

Tourism Bureaus and Newspapers Reviews

- Calhoun County was not explicitly mentioned in the review of newspaper articles, however, state-level findings indicate that bird-watching and recreational fishing were common activities in most of Texas' coastal counties.
- State-level findings also indicate that Texan restaurants reported a DWH impact of higher seafood prices, which they felt could not be fully passed on to consumers, and an avoidance of seafood consumption due to fears of contamination (Elder, 2010, Rice and Patel, 2010).

Cameron County, Texas

2011 Population: 414,123 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	4.0	4.0	3.7	3.9	4.1	4.2	3.8	3.9
Payroll ($M)	$15.1	$16.4	$15.1	$15.0	$16.5	$17.0	$15.7	$15.4
Establishments	256	255	259	259	255	258	256	259

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 625
- Individual: 282
- Business: 343

Value of Claims

- Total Claims: $445,053
- Individual: $5,000
- Business: $440,053

Most heavily impacted industry sectors

- Charter Fishing
- Hotel/Motel/Bed & Breakfast
- Boat Rental/Leasing

Field Interview Findings

- Field interviews did not address the oil spill impacts to southern coastal counties in Texas.

Tourism Bureaus and Newspapers Reviews

- Cameron County was not explicitly mentioned in the review of newspaper articles and websites; however, state-level findings indicate that southern counties in Texas tended to advertise more to tourists while the northern counties tended to direct the advertising to people who might move to the area.
- State-level findings also indicate that southern counties focus on recreational activities such as fishing and birding.

Chambers County, Texas

2011 Population: 35,552 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Payroll ($M)	$1.0	$1.1	$1.0	$1.1	$1.1	$1.1	$1.1	$1.1
Establishments	27	29	29	29	30	30	31	29

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 49
- Individual: 4
- Business: 45

Value of Claims

- Total Claims: -
- Individual: -
- Business: -

Most heavily impacted industry sectors

- No claims data available for this county

Field Interview Findings

- Field interviews did not specifically address the oil spill impacts on Chambers County, however, interviews from nearby Galveston County indicate that a range of tourism industries were negatively impacted by the oil spill, including decreases in large boat sales, boat service and maintenance, hotel overnight occupancy rates, charter boats/fishing, and restaurants visitors.

Tourism Bureaus and Newspapers Reviews

- Chambers County was not explicitly mentioned in the review of newspaper articles and websites; however, state-level findings indicate that northern counties in Texas tend to advertise more to people who might move to the area than to tourists.
- State-level findings also indicate that northern counties focus on recreational activities such as hunting.

Galveston County, Texas

2011 Population: 295,747 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009 Q2	2009 Q3	2009 Q4	2010 Q1	2010 Q2	2010 Q3	2010 Q4	2011 Q1
Employment (thousands)	4.8	5.0	4.6	4.4	4.9	4.9	4.5	4.5
Payroll ($M)	$24.3	$24.6	$24.1	$21.1	$24.3	$24.6	$24.3	$22.0
Establishments	241	251	247	246	246	246	250	252

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 1,133
- Individual: 592
- Business: 541

Value of Claims

- Total Claims: $2.5M
- Individual: $120,913
- Business: $2.3M

Most heavily impacted industry sectors

- Hotel/Motel/Bed & Breakfast
- Charter Fishing
- Boat Seller

Field Interview Findings

- 2007 had been the best year ever for tourism in Galveston County, but following Hurricane Ike in 2008, 2009-2010 were focused on rebuilding.
- A range of tourism industries were negatively impacted by the oil spill, including decreases in large boat sales, boat service and maintenance, hotel overnight occupancy rates, charter boats/fishing, and restaurants visitors.
- The majority of interviewees cited the media as being a negative influence in shaping public perception associated with the spill.
- The CVB did not go through the BP claims process, however, specific businesses, including boat dealers, were mentioned as currently in the process of filing a claim with BP.
- All interviewees indicated that 2012 had an increase in visitors and customers over 2011 numbers.

Tourism Bureaus and Newspapers Reviews

- Galveston County tourism had already been down because of the national recession and lingering impacts of Hurricane Ike in 2009 (Meyers, 2010).
- Hotel revenues for Galveston in 2010 were 28 percent higher than in 2009 (Kappes, 2010).
- Even after a small amount of tar balls reached Galveston in July, tourism remained steady with an 85 percent occupancy rate (Kappes, 2010).

Harris County, Texas

2011 Population: 4,180,894 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	59.7	58.6	57.2	56.2	61.2	61.1	57.8	59.0
Payroll ($M)	$361.6	$357.2	$375.1	$338.3	$400.5	$404.2	$384.9	$387.5
Establishments	2,973	2,962	2,980	2,977	2,996	3,005	3,033	3,038

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 817
- Individual: 510
- Business: 307

Value of Claims

- Total Claims: $3.4M
- Individual: $391,284
- Business: $3M

Most heavily impacted industry sectors

- Hotel/Motel/Bed & Breakfast
- Restaurant/Bakery/Food Stand
- Charter Fishing

Field Interview Findings

- Interviewees cited the media as being a negative influence in shaping public perception associated with the spill.
- A range of tourism industries were negatively impacted by the oil spill, including decreases in large boat sales, boat service and maintenance, hotel overnight occupancy rates, charter boats/fishing, and restaurants visitors.
- Interviewees indicated that the number of visitors and customers increased in 2012 compared to 2011 numbers.

Tourism Bureaus and Newspapers Reviews

- Harris County was not explicitly mentioned in the review of newspaper articles and websites; however, state level findings indicate that northern counties in Texas tend to advertise more to people who might move to the area than to tourists.
- State-level findings also indicate that northern counties focus on recreational activities such as hunting.

Jefferson County, Texas

2011 Population: 252,802 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	3.1	3.1	3.1	3.0	3.0	2.9	3.0	2.9
Payroll ($M)	$12.7	$12.7	$13.4	$12.1	$13.1	$13.0	$13.6	$12.1
Establishments	183	185	188	188	193	196	196	194

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 761
- Individual: 312
- Business: 449

Value of Claims

- Total Claims: $2.5M
- Individual: $8,000
- Business: $2.5M

Most heavily impacted industry sectors

- Boat Dealer
- Hotel/Motel/Bed & Breakfast
- Restaurant/Bakery/Food Stand

Field Interview Findings

- The oil spill impacts to Jefferson County or its adjacent counties were not addressed during field interviews.

Tourism Bureaus and Newspapers Reviews

- Jefferson County was not explicitly mentioned in the review of newspaper articles and websites; however, state-level findings indicate that northern counties in Texas tend to advertise more to people who might move to the area than to tourists.
- State level findings also indicate that northern counties focus on recreational activities such as hunting.

Jim Wells County, Texas

2011 Population: 41,339 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Payroll ($M)	$1.2	$1.2	$1.2	$1.1	$1.2	$1.3	$1.4	$1.3
Establishments	28	28	27	27	27	29	27	30

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 1
- Individual: 0
- Business: 1

Value of Claims

- Total Claims: -
- Individual: -
- Business: -

Most heavily impacted industry sectors

- No claims data available for this county

Field Interview Findings

- The oil spill impacts to Jim Wells County or its adjacent counties were not addressed during field interviews.

Tourism Bureaus and Newspapers Reviews

- Jim Wells County was not explicitly mentioned in the review of newspaper articles and websites; however, state-level findings indicate that southern counties in Texas tended to advertise more to tourists while the northern counties tended to direct the advertising to people who might move to the area.
- State level findings also indicate that southern counties focus on recreational activities such as fishing and birding.

Kenedy County, Texas

2011 Population: 437 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Payroll ($M)	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0	$0.0
Establishments	2	2	2	2	2	2	2	2

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: -
- Individual: -
- Business: -

Value of Claims

- Total Claims: -
- Individual: -
- Business: -

Most heavily impacted industry sectors

- No claims data available for this county

Field Interview Findings

- The oil spill impacts to Kenedy County or its adjacent counties were not addressed during field interviews.

Tourism Bureaus and Newspapers Reviews

- Kenedy County was not explicitly mentioned in the review of newspaper articles and websites; however, state-level findings indicate that southern counties in Texas tended to advertise more to tourists while the northern counties tended to direct the advertising to people who might move to the area.
- State-level findings also indicate that southern counties focus on recreational activities such as fishing and birding.

Kleberg County, Texas

2011 Population: 32,196 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.34	0.34	0.34	0.33	0.33	0.32	0.33	0.37
Payroll ($M)	$1.2	$1.1	$1.2	$1.1	$1.2	$1.1	$1.3	$1.4
Establishments	26	26	26	26	25	28	27	27

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 4
- Individual: 0
- Business: 4

Value of Claims

- Total Claims: $29,799
- Individual: -
- Business: $29,799

Most heavily impacted industry sectors

- Hotel/Motel/Bed & Breakfast

Field Interview Findings

- The oil spill impacts to Kleberg County or its adjacent counties were not addressed during field interviews.

Tourism Bureaus and Newspapers Reviews

- Kleberg County was not explicitly mentioned in the review of newspaper articles and websites; however, state-level findings indicate that southern counties in Texas tended to advertise more to tourists while the northern counties tended to direct the advertising to people who might move to the area.
- State-level findings also indicate that southern counties focus on recreational activities such as fishing and birding.

Liberty County, Texas

2011 Population: 76,206 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4
Payroll ($M)	$1.7	$1.8	$1.7	$1.6	$1.7	$1.8	$1.7	$1.7
Establishments	34	34	33	33	32	32	34	35

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 6
- Individual: 2
- Business: 4

Value of Claims

- Total Claims: $105,000
- Individual: $5,000
- Business: $100,000

Most heavily impacted industry sectors

- Charter Fishing

Field Interview Findings

- The oil spill impacts to Liberty County were not specifically addressed during field interviews, however, findings from interviews in nearby Harris County indicate that the media as being one of the most negative influences in shaping public perception associated with the spill.
- Harris County interviewees also noted that a range of tourism industries were negatively impacted by the oil spill, including decreases in large boat sales, boat service and maintenance, hotel overnight occupancy rates, charter boats/fishing, and restaurants visitors.

Tourism Bureaus and Newspapers Reviews

- Liberty County was not explicitly mentioned in the review of newspaper articles, however, state-level findings indicate that bird watching and recreational fishing were common activities in most of Texas' coastal counties.
- State level findings also indicate that Texan restaurants reported a DWH impact of higher seafood prices, which they felt could not be fully passed on to consumers, and an avoidance of seafood consumption due to fears of contamination (Elder, 2010; Rice and Patel, 2010).

Matagorda County, Texas

2011 Population: 36,809 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.3	0.3	0.3	0.3	0.3	0.3	0.3	0.3
Payroll ($M)	$1.1	$1.1	$1.1	$1.0	$1.1	$1.1	$1.0	$0.9
Establishments	38	38	39	38	37	37	37	38

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 204
- Individual:65
- Business: 139

Value of Claims

- Total Claims: $242,308
- Individual: $8,100
- Business: $234,208

Most heavily impacted industry sectors

- Marina/Dock/Ice Houses
- Hotel/Motel/Bed & Breakfast
- Boat Equipment Supplier/Vendor

Field Interview Findings

- Although 2009 was a recession year, Matagorda County did not see a large impact.
- Matagorda County experienced some tar balls and Galveston had some oil on the beach, however, in this area, the oil was not explicitly linked to the DWH spill.
- Interviewees cited the media as being a negative influence in shaping public perception associated with the spill.
- A range of tourism industries were negatively impacted by the oil spill, including decreases in large boat sales, boat service and maintenance, hotel overnight occupancy rates, charter boats/fishing, and restaurants visitors.

Tourism Bureaus and Newspapers Reviews

- Bird-watching and recreational fishing were common activities in most of Texas' coastal counties. There was ample mention of the Audubon Bird Watching trail.
- State-level findings also indicate that Texan restaurants reported a DWH impact of higher seafood prices, which they felt could not be fully passed on to consumers, and an avoidance of seafood consumption due to fears of contamination (Elder, 2010; Rice and Patel, 2010).

Nueces County, Texas

2011 Population: 343,281 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	5.8	5.8	5.3	5.2	5.8	5.8	5.4	5.3
Payroll ($M)	$23.6	$24.6	$23.5	$21.7	$25.2	$25.4	$24.9	$23.4
Establishments	326	328	327	325	327	329	330	327

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 45
- Individual: 7
- Business: 38

Value of Claims

- Total Claims: $1.7M
- Individual: $12,189
- Business: $1.7M

Most heavily impacted industry sectors

- Hotel/Motel/Bed & Breakfast
- Charter Fishing
- Restaurant/Bakery/Food Stand

Field Interview Findings

- The oil spill impacts to Neuces County or its adjacent counties were not addressed during field interviews.

Tourism Bureaus and Newspapers Reviews

- Bird watching and recreational fishing were common activities in most of Texas' coastal counties. There was ample mention of the Audubon Bird Watching trail.
- State-level findings also indicate that Texan restaurants reported a DWH impact of higher seafood prices, which they felt could not be fully passed on to consumers, and an avoidance of seafood consumption due to fears of contamination (Elder, 2010; Rice and Patel, 2010).

Orange County, Texas

2011 Population: 82,487 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.7	0.7	0.6	0.6	0.6	0.6	0.6	0.6
Payroll ($M)	$2.2	$2.2	$2.2	$2.1	$2.2	$2.3	$2.2	$2.0
Establishments	54	55	54	54	53	56	54	52

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 34
- Individual: 12
- Business: 22

Value of Claims

- Total Claims: $314,828
- Individual: -
- Business: $314,828

Most heavily impacted industry sectors

- Hotel/Motel/Bed & Breakfast

Field Interview Findings

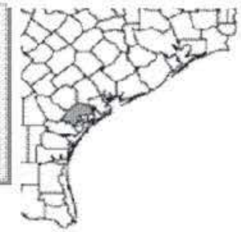
- The oil spill impacts to Orange County or its adjacent counties were not addressed during field interviews.

Tourism Bureaus and Newspapers Reviews

- Orange County was not explicitly mentioned in the review of newspaper articles and websites; however, state-level findings indicate that northern counties in Texas tend to advertise more to people who might move to the area than to tourists.
- State-level findings also indicate that northern counties focus on recreational activities such as hunting.

Refugio County, Texas

2011 Population: 7,291 (source: U.S. Census Bureau)



Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Payroll ($M)	$0.1	$0.1	$0.1	$0.1	$0.2	$0.1	$0.2	$0.1
Establishments	6	6	6	6	7	7	7	7

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: -
- Individual: -
- Business: -

Value of Claims

- Total Claims: -
- Individual: -
- Business: -

Most heavily impacted industry sectors

- No industry claims data available for this county

Field Interview Findings

- The oil spill impacts to Refugio County or its adjacent counties were not addressed during field interviews.

Tourism Bureaus and Newspapers Reviews

- Bird watching and recreation fishing were common activities in most of Texas' coastal counties. There was ample mention of the Audubon Bird Watching trail.
- State-level findings also indicate that Texan restaurants reported a DWH impact of higher seafood prices, which they felt could not be fully passed on to consumers, and an avoidance of seafood consumption due to fears of contamination (Elder, 2010; Rice and Patel, 2010).

San Patricio County, Texas

2011 Population: 64,726 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.7	0.7	0.6	0.6	0.6	0.6	0.6	0.6
Payroll ($M)	$2.3	$2.4	$2.4	$2.6	$2.3	$2.5	$2.5	$3.0
Establishments	52	53	53	52	52	53	51	54

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: 34
- Individual: 11
- Business: 23

Value of Claims

- Total Claims: $631,163
- Individual: $42,000
- Business: $589,163

Most heavily impacted industry sectors

- Hotel/Motel/Bed & Breakfast
- Charter Fishing
- Restaurant/Bakery/Food Stand

Field Interview Findings

- The oil spill impacts to San Patricio County or its adjacent counties were not addressed during field interviews.

Tourism Bureaus and Newspapers Reviews

- Bird-watching and recreation fishing were common themes in most of Texas' coastal counties. There was ample mention of the Audubon Bird Watching trail.
- State-level findings also indicate that Texan restaurants reported a DWH impact of higher seafood prices, which they felt could not be fully passed on to consumers, and an avoidance of seafood consumption due to fears of contamination (Elder, 2010; Rice and Patel, 2010).

Victoria County, Texas

2011 Population: 87,545 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	1.0	1.0	0.9	0.9	1.0	0.9	0.9	0.9
Payroll ($M)	$3.7	$3.7	$3.7	$3.5	$3.9	$3.7	$3.9	$3.5
Establishments	69	67	68	68	67	68	67	71

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: -
- Individual: -
- Business: -

Value of Claims

- Total Claims: 4
- Individual: 0
- Business: 4

Most heavily impacted industry sectors

- No claims data available for this county

Field Interview Findings

- The oil spill impacts to Victoria County or its adjacent counties were not addressed during field interviews

Tourism Bureaus and Newspapers Reviews

- Victoria County was not explicitly mentioned in the review of newspaper articles, however, state-level findings indicate that bird watching and recreational fishing were common activities in most of Texas' coastal counties.
- State-level findings also indicate that Texan restaurants reported a DWH impact of higher seafood prices, which they felt could not be fully passed on to consumers, and an avoidance of seafood consumption due to fears of contamination (Elder, 2010; Rice and Patel, 2010).

Willacy County, Texas

2011 Population: 22,095 (source: U.S. Census Bureau)

Travel and Tourism Employment, Payroll, and Establishment, Second Quarter 2009 to First Quarter 2011

Travel and Tourism Economic Indicator	2009			2010				2011
	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
Employment (thousands)	0.10	0.10	0.10	0.09	0.09	0.09	0.05	0.10
Payroll ($M)	$0.3	$0.3	$0.3	$0.3	$0.3	$0.3	$0.2	$0.3
Establishments	17	16	16	14	14	14	14	14

Gulf Coast Claims Facility (GCCF) Data

Number of Claims

- Total Claims: -
- Individual: -
- Business: -

Value of Claims

- Total Claims: -
- Individual: -
- Business: -

Most heavily impacted industry sectors

- No claims data available for this county

Field Interview Findings

- The oil spill impacts to Willacy County or its adjacent counties were not addressed during field interviews.

Tourism Bureaus and Newspapers Reviews

- Willacy County was not explicitly mentioned in the review of newspaper articles and websites; however, state-level findings indicate that southern counties in Texas tended to advertise more to tourists while the northern counties tended to direct the advertising to people who might move to the area.
- State-level findings also indicate that southern counties focus of recreational activities such as fishing and birding.

APPENDIX C: NEWSPAPER REFERENCES

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APPENDIX D: LIST OF FIELD INTERVIEWEES BY STATE

Alabama

Gulf Shores and Orange Beach Tourism
National Association of Charterboat Operators
Restaurant

Florida

Northwest Florida Tourism Council
St. Petersburg/Clearwater Area Convention and Visitors Bureau
Visit Florida
Charter Fishing
Lodging
Restaurant

Louisiana

Gulf Coast Alliance for Economic and Environmental Resilience
Houma Area Convention and Visitors Bureau
New Orleans Metropolitan Convention and Visitors Bureau
Charter Boat Operator
Charter Fishing
Lodging
Marina Owner
Restaurant
Tour Operator

Mississippi

Gulf Coast Chapter of the Mississippi Restaurant & Hospitality Association
Mississippi Coast Regional Tourism Partnership
Mississippi Hotel & Lodging Association

Texas

Galveston Island Convention and Visitors Bureau
Matagorda County Convention and Visitor's Bureau
Boat Dealer

APPENDIX E: FIELD INTERVIEW GUIDES

FIELD INTERVIEWS: LOCAL AND REGIONAL TOURISM BUREAUS

Thanks for participating in this discussion. Our company, Eastern Research Group, Inc. (ERG), has been contracted by the Bureau of Ocean Energy Management (BOEM) to help examine the relationship between tourism and offshore oil and gas activities in the Gulf of Mexico. As part of this project, ERG has been asked to interview local and regional tourism bureaus, trade associations, businesses, and other regional organizations regarding their experiences surrounding the *Deepwater Horizon* (DWH) oil spill. Your insights will be invaluable in informing our understanding of how the DWH impacted the local travel, tourism and recreational (TTR) economies and our subsequent report to BOEM.

The questions below are intended as a guide to our discussion, however, we welcome any input from you to help us better understand the tourism bureau's perspective regarding the local tourism and recreational economies and the *Deepwater Horizon* (DWH) oil spill.

1. Please tell us about yourself and role here at the tourism bureau.

2. What is the role of the bureau in the tourism and/or recreation economy?
   a. What role does the bureau play in terms of local people's recreation?

3. How are the tourism bureau and its efforts funded?

4. Can you tell us a little about the tourism and recreation economy represented and supported by your bureau?
   a. Geographical area covered?
   b. Primary industries?
   c. Percentage of local economy that is attributable to tourism and recreation?

5. How does the local tourism and recreation economy compare to that of nearby counties? The state? The Gulf?

6. Please describe what travel, tourism, and recreation in your area was like before the *Deepwater Horizon* (DWH) oil spill.
   a. What were the most thriving industries or the biggest draw for tourism and recreation?
   b. Approximately what percent of the population was reliant on a travel, tourism, or recreation-related industry for employment?
   c. What approach was taken for marketing the local travel, tourism, and recreation economy (e.g., did they play up pristine beaches or focus on the quality of their seafood)?

7. How did the DWH oil spill impact the local tourism and recreation economy?
   a. Were your shores physically impacted/any beach closures? During what time frame?

   b. What types of tourism and recreational impacts resulted from the oil spill (e.g., lost visitors, lost establishments, lost employees) during the first six months after DHW? After the first year?
      - What were the estimated economic impacts of the oil spill on your county/region?
   c. Relative impacts:
      - Were there certain businesses or industries that were hit harder than others?
         - Which tourism and recreational industries seemed to have been least affected?
      - Relative impacts of beach vs. non beach areas?
      - Were the local challenges/impacts similar to other surrounding counties and regions?
   d. Did tourist's public perception of the tourism and recreation opportunities or destinations change? If so, how?

8. What has the recovery process been like for the local tourism and recreation economy?

9. What portion of TTR business had patrons comprised of clean-up workers rather than tourists?

10. How would you characterize the tourism and recreation economy now compared to pre-the oil spill (e.g. status of establishments, employment, number of visitors)?

11. What changes occurred in the nature and structure of TTR economy following the DWH oil spill?
   a. Did the effects of the DWH shift economic opportunities from any industry sector or geographical are to others in the region or state? If so, please describe.
   b. Have you noticed any trends within the tourism and recreation economy since the DWH oil spill (e.g., loss of jobs, tourists visiting other parts of the state)? If yes, please describe.

12. Are there any ongoing or unresolved challenges faced by the local tourism and recreation economy as a result of DWH?

13. Where do you see the tourism and recreation economy going (or needing to go) over the next five years?
   a. Barriers for the future tourism and recreation economy?
   b. Facilitators for the future tourism and recreation economy?

14. When the DWH oil spill occurred, what were the key challenges that the tourism bureau faced?

15. How did the tourism bureau respond to the challenges presented by the oil spill?
   a. What methods of response were used?
      - How did you decide where to direct your efforts?
      - Did the response methods used alter the way that the tourism bureau functioned or its areas of focus pre-DWH? If so, please describe.
   b. How was this response or set of responses funded?

- To what extent did BP funds offset TTR losses?

c. Were efforts successful?
   - Were there any limitations to the methods used?
   - What worked, what didn't work, and why?
   - How did you measure success?

d. Would you do anything differently if an incident like this were to occur again? If so, please describe.

e. Is there particular information or resources that would have benefitted your response efforts? If so, please describe.

16. Is there anything we missed? Questions that we should have asked?

17. Do you have any other comments or feedback that you would like to provide?

Thank you for your time and participation!

FIELD INTERVIEWS: TRADE ASSOCIATIONS

Thanks for participating in this discussion. Our company, Eastern Research Group, Inc. (ERG), has been contracted by the Bureau of Ocean Energy Management (BOEM) to help examine the relationship between tourism and offshore oil and gas activities in the Gulf of Mexico. As part of this project, ERG has been asked to interview local and regional tourism bureaus, trade associations, businesses, and other regional organizations regarding their experiences surrounding the *Deepwater Horizon* (DWH) oil spill. Your insights will be invaluable in informing our understanding of how the DWH impacted the local travel, tourism and recreational (TTR) economies and our subsequent report to BOEM.

The questions below are intended as a guide to our discussion, however, we welcome any input from you to help us better understand the trade association's perspective regarding the local tourism and recreational economies and the *Deepwater Horizon* (DWH) oil spill.

2. Please describe the industry or sectors supported by your trade association as well as your role in the association?
   a. Geographical area covered?
   b. Characteristics of your members (e.g., corporations vs. independent business owners)?

3. What percentage of your members' revenues is attributable to tourism and recreation?

4. Does the association have a role in promoting tourism?

5. How are the association's efforts funded?

6. Are you part of a larger national organization? Linked to other trade associations in the Gulf?

7. Please describe what travel, tourism, and recreation sectors affiliated with your trade association were like before the *Deepwater Horizon* (DWH) incident.
   - Volume of tourists
   - Number of employees
   - Revenue generated

   a. What approach to marketing was taken for the industries involved in the association prior to the oil spill?

8. How did the DWH oil spill impact the industries/businesses involved in the Association?
   a. What were the key challenges that you and your members faced?
   b. What are some of the direct impacts felt by your members
      - Did the type of patrons (e.g., clean-up workers vs. tourists; spending patterns) change?

   c. What are some of the indirect impacts felt by your members?
   d. Relative impacts:

- Were there certain businesses (e.g., independent; newer) or industries that were harder hit than others?
  - Which tourism and recreational industries seemed to have been least affected?
- Were the industry challenges/impacts similar to other Gulf regions?

e. Did tourist's public perception of your industry change? If so, how?

9. What has the recovery process been like for the industries/businesses represented by your Association?
   a. How did businesses respond to the DWH oil spill?
   b. What methods of response were used (e.g., PR, environmental mitigation)?
   c. How were these responses funded?
      - What was the experience of businesses submitting claims and receiving payment?
        - Length of time to process claim?
        - Did the claim process present any challenges?
        - Is this experience similar to other local businesses or businesses within your industry?
      - Were there other businesses that you know of that didn't have their claim(s) granted?
   d. Were efforts successful?
      - What worked, what didn't work, and why?
      - How did you measure success?
   e. Would you do anything differently if an incident like this were to occur again? If so, please describe.
   f. Is there particular information or resources that would have benefitted your response efforts? If so, please describe.

10. What is the tourism and recreation economy like now for the industries/businesses represented by your Association?

11. What changes occurred in the nature and structure of TTR economy following the DWH oil spill?
    a. Did the effects of the DWH shift economic opportunities from any industry sector or geographical are to others in the region or state? If so, please describe.
    b. Have you noticed any trends within the tourism and recreation economy since the DWH oil spill (e.g., loss of jobs, tourists visiting other parts of the state)? If yes, please describe.

12. What portion of TTR following the spill was comprised of clean-up workers versus tourists?

13. Are there any ongoing or unresolved challenges faced by the local tourism and recreation economy?

14. Where do you see the tourism and recreation economy going (or needing to go) over the next five years?
    a. How will this affect the industries and businesses that you represent?

- Barriers for the future tourism and recreation economy?
- Facilitators for the future tourism and recreation economy?

15. When the DWH oil spill occurred, what were the key challenges that the trade association faced?

16. How did the trade association respond to the challenges presented by the oil spill?
    a. What methods of response were used?
        - How did you decide where to direct your efforts?
        - Did the response methods used alter the way that the association functioned or its areas of focus pre-DWH? If so, please describe.
    b. How was this response or set of responses funded?
        - Did the trade association receive any BP funds?
        - To what extent did BP funds offset TTR losses?
    c. Were efforts successful?
        - Were there any limitations to the methods used?
        - What worked, what didn't work, and why?
        - How did you measure success?
    d. Would you do anything differently if an incident like this were to occur again? If so, please describe.
        e. Is there particular information or resources that would have benefitted your response efforts? If so, please describe.

17. Is there anything we missed? Questions that we should have asked?

18. Do you have any other comments or feedback that you would like to provide?

Thank you for your time and participation!

FIELD INTERVIEWS: BUSINESSES

Thanks for participating in this discussion. Our company, Eastern Research Group, Inc. (ERG), has been contracted by the Bureau of Ocean Energy Management (BOEM) to help examine the relationship between tourism and offshore oil and gas activities in the Gulf of Mexico. As part of this project, ERG has been asked to interview local and regional tourism bureaus, trade associations, businesses, and other regional organizations regarding their experiences surrounding the *Deepwater Horizon* (DWH) oil spill. Your insights will be invaluable in informing our understanding of how the DWH impacted the local travel, tourism and recreational (TTR) economies and our subsequent report to BOEM.

The questions below are intended as a guide to our discussion, however, we welcome any input from you to help us better understand the local business perspective regarding the local tourism and recreational economies and the *Deepwater Horizon* (DWH) oil spill.

1. Please tell us a little bit about your business.
   a. Years of operation?
   b. Independently owned?
   c. More than one location?
   d. Number of employees
      - Number or Percentage of seasonal employees?
   e. Estimate number of annual visitors/customers
      - About what percent of your annual customers are considered "tourists" (i.e. from greater than 50 miles away)?

2. Please discuss your reliance on coastal resources (e.g., located on water; customer base is tourists; seafood)?

3. How would you describe the functioning of your business (e.g., visitors, revenue, etc) and its broader industry before the *Deepwater Horizon* (DWH) oil spill?
   a. Were there significant impacts on your businesses due to the recession? Lingering effects of Hurricane Katrina?

4. When did oil arrive in your area?

5. How did the DWH oil spill impact your business?
   a. What were the key challenges that you faced?
   b. What are some of the direct impacts felt by your business (e.g., loss of revenue, employees; type of customer or spending pattern)?
      - Were these impacts similar to other businesses in your industry within the region? Please explain.
   c. What are some of the indirect impacts felt by your business?
   d. Did tourist's public perception of your business or the broader industry change? If so, how?
6. What has the recovery process been like for your company?

a. How did your business respond to the DWH oil spill?
b. Did you work with other organizations (e.g., trade association; tourism bureaus; other business owners)
c. What methods of response were used (e.g., social media, change in cancellation policies, PR)?
    - How did you decide where to direct your efforts?
    - Did the response methods that you implemented alter the way that you did business pre-DWH? If so, please describe.
d. How was this response or set of responses funded?
    - What was your experience like submitting a claim and receiving payment?
        - Length of time to process claim?
        - Did the claim process present any challenges?
        - Is this experience similar to other local businesses or businesses within your industry?
    - Were there other businesses that you know of that didn't have their claim(s) granted?
e. Were efforts successful?
    - What worked, what didn't work, and why?
    - How did you measure success?
f. Would you do anything differently if an incident like this were to occur again? If so, please describe.
g. Is there particular information or resources that would have benefitted your response efforts? If so, please describe.

7. What are your business and its broader industry like now (e.g. status of establishments, employment, number of visitors)?

8. What changes occurred in the nature and structure of TTR economy following the DWH oil spill?
    a. Did the effects of the DWH shift economic opportunities from your business or broader industry to any other sectors in the region or state? If so, please describe.
    b. Have you noticed any trends within the broader tourism and recreation economy since the DWH oil spill (e.g., loss of jobs, tourists visiting other parts of the state)? If yes, please describe.

9. Are there any ongoing or unresolved challenges faced by your business or the local tourism and recreation economy as a result of the oil spill?

10. Where do you see the tourism and recreation economy going (or needing to go) over the next five years?
    a. Barriers for the future tourism and recreation economy?
    b. Facilitators for the future tourism and recreation economy?
11. Is there anything we missed? Questions that we should have asked?

12. Do you have any other comments or feedback that you would like to provide?

Thank you for your time and participation!

Field Interviews: Gulf Coast Alliance for Economic and Environmental Resilience

Thanks for participating in this discussion. Our company, Eastern Research Group, Inc. (ERG), has been contracted by the Bureau of Ocean Energy Management (BOEM) to help examine the relationship between tourism and offshore oil and gas activities in the Gulf of Mexico. As part of this project, ERG has been asked to interview local and regional tourism bureaus, trade associations, businesses, and other regional organizations regarding their experiences surrounding the *Deepwater Horizon* (DWH) oil spill. Your insights will be invaluable in informing our understanding of how the DWH impacted the Gulf Coast travel, tourism and recreational (TTR) economies and our subsequent report to BOEM.

The questions below are intended as a guide to our discussion, however, we welcome any input from you to help us better understand the tourism bureau's perspective regarding the local tourism and recreational economies and the *Deepwater Horizon* (DWH) oil spill.

1. Please tell us a little bit about the formation of the Gulf Coast Alliance for Economic and Environmental Resilience and your role in the Alliance.
   a. How did the organization form and who are the members?
   b. Do you have paid staff or do you have other jobs?
   c. How are the Alliance's efforts funded?
   d. How active are members?

2. What are the aims of the Alliance and its role in the tourism and recreation economy?
   a. What percent is tourism initiatives compared to other Alliance economic areas?
   b. How has/does the Alliance work with other agencies and organizations such as NOAA and the Gulf of Mexico Alliance (GOMA)?

3. How did the DWH oil spill impact the local tourism and recreation economy?
   a. What types of tourism and recreational impacts resulted from the oil spill (e.g., lost visitors, lost establishments, lost employees)
   b. Relative impacts:
      - Were there certain businesses or industries that were hit harder than others?
        - Which tourism and recreational industries seemed to have been least affected?
      - Relative impacts of beach vs. non beach areas?
      - Were the local challenges/impacts similar to other surrounding counties and regions?
   c. Did tourist's public perception of the tourism and recreation opportunities or destinations change? If so, how?
      - Was this change in public perception specific to particular areas?

4. According to a factsheet that we located online about the Alliance, we saw where the Alliance "developed surveys to gauge the impact of the spill on coastal businesses".
   a. What types of surveys were developed to gauge the impact of the spill on coastal businesses?
   b. Who was surveyed?

c. How was the survey implemented?

5. What were the survey findings?
   a. Is a there a copy of the findings available to us?

6. Were the survey findings used to direct Alliance efforts? If so, how?

7. What has the recovery process been like for the Gulf coast tourism and recreation economy?
   a. How did the tourism and recreation economies respond to these challenges?
      - Did responses differ among states? Industries?
   b. How did the physical presence of oil on the beaches impact businesses?
      - What impact did oil on beaches have (i.e., what were short term vs. longer term impacts)

8. Please describe what the claims process was like for businesses.
   a. What kind of claims help did the Alliance provide?
   b. Approximately how many businesses did the Alliance assist in claim preparation?

9. In terms of businesses, industries, or regions dealing with the DHW oil spill: Were any best practices identified for economic recovery or resiliency? If so, please describe.
   a. Has the Alliance promoted these best practices? If so, how?

10. How did the Alliance respond to the challenges presented by the oil spill?
    a. What methods of response were used?
       - How did you decide where to direct your efforts?
    b. How was this response or set of responses funded?
       - To what extent were you able to access BP funds or participate in the tourism promotions developed with BP money?
    c. Were efforts successful?
       - Were there any limitations to the methods used?
       - What worked, what didn't work, and why?
       - How did you measure success?
    d. Would you do anything differently if an incident like this were to occur again? If so, please describe.
    e. Is there particular information or resources that would have benefitted your response efforts? If so, please describe.

11. What were/are the most beneficial aspects of the business associations and other organizations working together to address DWH issues? The most challenging?

12. Are there certain states or regions that are recovering faster than others? If so, what areas, and what has increased their recovery process?

13. What is the tourism and recreation economy like now (e.g. status of establishments, employment, number of visitors)?

14. What changes occurred in the nature and structure of TTR economy following the DWH oil spill?
    a. Did the effects of the DWH shift economic opportunities from any industry sector or geographical are to others in the region or state? If so, please describe.
    b. Have you noticed any trends within the tourism and recreation economy since the DWH oil spill (e.g., loss of jobs, tourists visiting other parts of the state)? If yes, please describe.

15. Are there any ongoing or unresolved challenges faced by the local tourism and recreation economy?

16. In working with communities, governments, academia and other partners to identify ways to protect and improve the economic resiliency of the Gulf Coast, what were some of your findings/take-aways?

17. Where do you see the tourism and recreation economy going (or needing to go) over the next five years?
    a. Barriers for the future tourism and recreation economy?
    b. Facilitators for the future tourism and recreation economy?

18. Is there anything we missed? Questions that we should have asked?

19. Do you have any other comments or feedback that you would like to provide?

Thank you for your time and participation!