

Responsive Management™



PANAMA CITY RESIDENTS', VISITORS', AND BUSINESS OPERATORS' ATTITUDES TOWARD THE ILLEGAL FEEDING AND HARASSMENT OF WILD DOLPHINS

Conducted for the National Marine Fisheries Service

by Responsive Management

2011

**PANAMA CITY RESIDENTS', VISITORS', AND
BUSINESS OPERATORS' ATTITUDES TOWARD THE
ILLEGAL FEEDING AND HARASSMENT OF
WILD DOLPHINS**

2011

Responsive Management National Office

Mark Damian Duda, Executive Director
Martin Jones, Senior Research Associate
Tom Beppler, Research Associate
Steven J. Bissell, Ph.D., Qualitative Research Associate
Andrea Criscione, Research Associate
Patrick Doherty, Research Associate
Amanda Ritchie, Research Associate
Carol L. Schilli, Research Associate
Tim Winegord, Survey Center Manager
Alison Lanier, Business Manager

130 Franklin Street
Harrisonburg, VA 22801
Phone: 540/432-1888 Fax: 540/432-1892
E-mail: mark@responsivemanagement.com
www.responsivemanagement.com

Acknowledgments

Responsive Management would like to thank Stacey Horstman of the National Marine Fisheries Service for her input, support, and guidance on this project.

EXECUTIVE SUMMARY

INTRODUCTION AND METHODOLOGY

This study was conducted for the National Oceanic and Atmospheric Administration's National Marine Fisheries Service (NMFS) to measure public awareness and knowledge of dolphin conservation, assess participation in marine recreational activities and interactions with wild dolphins, and determine the effectiveness of NMFS-supported public outreach efforts. The study entailed surveys of three groups in Panama City, Florida: residents, visitors to the area, and local water-based and dolphin-related commercial businesses (alternately referred to as "businesses" or "business operators" in this report, depending on context).

The principal methodology for conducting the surveys of residents and visitors was an in-person intercept approach through interviews with randomly selected respondents around various piers, visitor centers, marinas, and beachside hotels throughout the Panama City metro area. To avoid any non-response bias and to accommodate individuals who were unable to complete a survey in person (for instance, when potential respondents were busy with other family members or were simply unable to spare enough time to be interviewed), follow-up telephone interviews of residents and visitors were used to supplement the intercept surveys. The surveys were administered throughout four seasonal data collection periods from November 2010 to July 2011. The survey of commercial businesses was conducted both on-site in Panama City as well as via telephone interviews scheduled with business owners and managers at their convenience.

All three survey questionnaires were developed cooperatively by NMFS and Responsive Management. Responsive Management obtained a total of 465 completed interviews, including 205 interviews with Panama City residents, 171 with visitors to Panama City, and 89 with commercial businesses located in Panama City. The software used for entry of the hard copy survey data and for the telephone interviews was Questionnaire Programming Language (QPL). The analysis of data was performed using Statistical Package for the Social Sciences as well as proprietary software developed by Responsive Management.

For the resident and visitor surveys, nonparametric analyses were run to examine how the various responses to questions related to participatory and demographic characteristics and

opinions. Responses for selected questions were tested by means of z-scores for relationships to various characteristics (i.e., the characteristics as revealed by responses to other questions, including a series of demographic questions). The variables that were run in the nonparametric analyses of resident and visitor survey results are shown on page 10 of this report; an explanation of how to interpret the nonparametric analysis results is provided on page 14.

For the survey of commercial businesses, crosstabulations were run on some questions to determine any pertinent differences in answers based on key variables among respondents. These crosstabulations included the type or category of business, the number of years the business had been in operation (i.e., whether the business had been in operation above or below the median number of 13 years), and whether the business was vessel-based.

CONCERN FOR THE PROTECTION OF WILD DOLPHINS

- Large majorities of the three groups surveyed (residents, visitors, and business operators) say they are concerned about protecting wild dolphins, with respondents from each group most commonly saying they are *very* concerned.
 - The nonparametric analysis found that, among both residents and visitors, those *very* concerned about protecting wild dolphins are also more likely to be *very* interested in closely interacting with dolphins in the wild. Residents and visitors *very* concerned about protecting wild dolphins are also more likely to be members of or to have donated to a boating, fishing, recreation, or conservation organization.
 - Conversely, residents who say they are *not at all* concerned about protecting wild dolphins are more likely to be 65 years old or older.
 - The crosstabulations revealed that, among commercial businesses, water-related rentals (e.g., boats, jet skis, or kayaks) and guided tours or excursions (e.g., diving, wildlife viewing, dolphin tours) are the types of businesses most likely to be *very* concerned about protecting wild dolphins. Conversely, chartered fishing trip providers appear the least likely to indicate being concerned about protecting wild dolphins. (The other business types included hospitality or tourism services, such as retailers, restaurants, or vacation rentals; and marine-related services, such as those providing boating lessons, license courses, or operators of piers or marinas).

- Operators of newer businesses (i.e., those that had been in operation for the median of 13 years or less), compared to operators of older businesses (i.e., those that had been in operation for more than the median of 13 years), appear more likely to be *very* concerned about protecting wild dolphins. (Operators of older businesses are more likely to say they are *somewhat* concerned about protecting wild dolphins.)
- Operators of non-vessel-based businesses, compared to operators of vessel-based businesses, appear slightly more likely to be *very* or *somewhat* concerned about protecting wild dolphins.

INTEREST IN FEEDING AND INTERACTING WITH WILD DOLPHINS

- Although both residents and visitors most commonly say they are *not at all* interested in feeding dolphins in the wild, visitors appear more likely than residents to express some interest in doing so. Residents, on the other hand, appear more likely to say they are *not at all* interested in feeding dolphins in the wild.
- Regarding closely interacting with dolphins in the wild (i.e., swimming with, touching, or petting them), respondents in both groups most commonly say they are *not at all* interested. However, visitors, compared to residents, appear slightly more likely to be *somewhat* interested in doing so.
 - The nonparametric analysis found that residents and visitors who say they are *very* interested in closely interacting with dolphins in the wild are also more likely to have viewed dolphins on their own in the Panama City area in the past two years; to be *very* concerned about protecting wild dolphins; to be *very* interested in feeding dolphins in the wild; and to be younger than 55 years old.

SOURCES OF INTEREST AND INFORMATION ABOUT WILD DOLPHINS AND DOLPHIN-HUMAN INTERACTIONS

- Residents who say they are interested in feeding and/or closely interacting with dolphins in the wild most commonly say their interest was created by television, movies, aquariums, general word of mouth, or personal experiences.

- Visitors who say they are interested in feeding and/or closely interacting with dolphins in the wild most often say their interest was created by television, aquariums, general word of mouth, or zoos or wildlife parks.

- A specific list of information sources was read to respondents in each group asking whether they had heard or read about feeding dolphins. The list included signs, brochures, public service announcements, zoological or nature centers, the Internet, television news, newspaper articles, or “other” sources (for which respondents could fill in their own response).
 - Residents most commonly hear or read about feeding dolphins from television news, newspaper articles, public service announcements, or signs.
 - The nonparametric analysis found that residents who have heard or read about feeding dolphins from public service announcements were more likely to correctly indicate, in later questions, that both feeding and swimming with, touching, or petting dolphins in the wild are *illegal and harmful*. Residents who have heard or read about feeding dolphins from public service announcements are also more likely to be employed and younger than 65 years old.
 - Visitors most commonly say they are unsure whether they have heard or read about feeding dolphins from the sources on the list; otherwise, they most often hear or read about feeding dolphins from television news or the Internet.
 - Business operators most commonly hear or read about feeding dolphins from brochures, signs, newspaper articles, or television news.

(Graphs showing rankings of the specific sub-types within the main lists of sources from which respondents heard or read about feeding dolphins begin on page 42 of this report.)

- Among the three respondent groups, residents are the least likely to have heard or read something that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild, and business operators are the most likely to have heard or read something pertaining to this. (While 23% of residents have heard or read something that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild, 29% of visitors and 38% of business operators say they same.)

- The crosstabulations found that, among commercial business operators, water-related rentals (e.g., boats, jet skis, or kayaks) and marine-related services (e.g., those providing boating lessons, license courses, or operators of piers or marinas) are the types of businesses most likely to have heard or read something that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild.
 - Operators of vessel-based businesses, compared to operators of non-vessel-based businesses, appear more likely to have heard or read something that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild.
-
- Residents who have heard or read something that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild most commonly say they heard or read the information on television, through commercial tour operations, at aquariums, or through general word of mouth.
 - Visitors who have heard or read something that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild most commonly say they heard or read the information on television, through general word of mouth, through commercial tour operations, or through advertisements.
 - Business operators who have heard or read something that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild most commonly say they heard or read the information through advertisements (by far the most common source cited by this group), television, commercial tour operations, and magazines.
 - As before, the same list of specific information sources was read to all respondents in each group, not just those who had previously heard or read something that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild. For each source, respondents were asked if they had heard or read about swimming with, touching, or petting dolphins:
 - Residents most commonly hear or read about swimming with, touching, or petting dolphins from television news, newspaper articles, public service announcements, and signs.

- Visitors most commonly say they are unsure whether they have heard or read about swimming with, touching, or petting dolphins from the sources on the list; otherwise, they most commonly hear or read about swimming with, touching, or petting dolphins from television news, brochures, and the Internet.
- Business operators most commonly hear or read about swimming with, touching, or petting dolphins from brochures, signs, television news, and public service announcements.

(Graphs showing rankings of the specific sub-types within the main lists of sources from which respondents heard or read about swimming with, touching, or petting dolphins begin on page 57 of this report.)

KNOWLEDGE OF THE LEGALITY OF DOLPHIN-HUMAN INTERACTIONS

- All three surveys included questions assessing respondents' knowledge of laws regarding feeding and interacting with dolphins; for each question, respondents were given a list of four statements and asked to choose the one that was true in the United States. The statements read as follows (note that "feeding dolphins in the wild" and "swimming with, touching, or petting dolphins in the wild" were asked about in separate questions):
 - Feeding dolphins / swimming with, touching, or petting dolphins in the wild is **illegal but not harmful**.
 - Feeding dolphins / swimming with, touching, or petting dolphins in the wild is **not illegal but is harmful**.
 - Feeding dolphins / swimming with, touching, or petting dolphins in the wild is **illegal and harmful**.
 - Feeding dolphins / swimming with, touching, or petting dolphins in the wild is **not illegal nor harmful**.
- Regarding the legality of feeding dolphins, more than half of residents and business operators give the correct answer (that feeding dolphins in the wild is illegal and harmful), while visitors most commonly say that they do not know.

- While 56% of residents correctly answer that feeding dolphins in the wild is *illegal and harmful*, about a fifth (18%) say they do not know. Otherwise, smaller percentages think it is *illegal but not harmful* (11%), *not illegal but is harmful* (10%), or *not illegal nor harmful* (5%).
 - The nonparametric analysis found that residents who know that feeding dolphins in the wild is *illegal and harmful* are more likely to have gotten information about feeding dolphins from a public service announcement (an outreach method to which NFMS has devoted rather substantial effort in recent years). (Conversely, residents who did *not* indicate that feeding dolphins in the wild is *illegal and harmful* were more likely to have *not* gotten information about feeding dolphins from a public service announcement.)
- Visitors show a greater range in their answers: while they most often say they are unsure (31%), the next most common answer is the correct one, that feeding dolphins in the wild is *illegal and harmful* (27% of visitors give this answer). Meanwhile, close to a fifth of visitors either say that feeding dolphins in the wild is *not illegal but is harmful* (18%) or is *not illegal nor harmful* (17%). The remaining 6% think it is *illegal but not harmful*.
 - The nonparametric analysis found that visitors who know that feeding dolphins in the wild is *illegal and harmful* were more likely to be employed, while visitors who did *not* indicate that feeding dolphins in the wild is *illegal and harmful* were more likely to *not* indicate being employed.
- While the vast majority of business operators are aware that feeding dolphins is *illegal*, opinion is split regarding whether or not it is *harmful*: while 55% of business operators correctly think that feeding dolphins in the wild is *illegal and harmful*, 40% say it is *illegal but not harmful*.
 - The crosstabulations found that, among commercial businesses, providers of chartered fishing trips, compared to the other types of businesses, appear the most likely to think that feeding dolphins in the wild is *illegal but not harmful*. Similarly, operators of vessel-based businesses appear more likely than operators of non-vessel-based businesses to believe that feeding dolphins in the wild is *illegal but not harmful* (operators of non-vessel-based businesses appear more likely to know that it is *illegal and harmful* to feed dolphins in the wild).

- Respondents from all three groups most often give the correct answer to the next question regarding the legality of swimming with, touching, or petting dolphins in the wild (that it is *illegal and harmful*). However, notable percentages of respondents from each group give other answers as well:
- Among residents, 41% answer correctly, while 20% are unsure. Meanwhile, 14% think it is *not illegal but is harmful*, 13% think it is *illegal but not harmful*, and 12% think it is *not illegal nor harmful*.
 - The nonparametric analysis found that residents who know that swimming with, touching, or petting dolphins in the wild is *illegal and harmful* were more likely to have at least a bachelor's degree, more likely to be employed, and more likely to have gotten information about swimming with, touching, or petting dolphins from a public service announcement.
 - While a third of visitors (33%) give the correct answer, 23% are unsure, with a further 23% thinking that swimming with, touching, or petting dolphins in the wild is *not illegal but is harmful*. Additionally, 15% say it is *not illegal nor harmful*, with 6% saying that it is *illegal but not harmful*.
 - The nonparametric analysis found that visitors who know that swimming with, touching, or petting dolphins in the wild is *illegal and harmful* were more likely to *not* indicate visiting the Panama City area for pleasure.
 - Among business operators, 39% answer correctly, with a further third (31%) saying that swimming with, touching, or petting dolphins in the wild is *illegal but not harmful*. Otherwise, smaller percentages think it is *not illegal nor harmful* (11%), *not illegal but is harmful* (9%), or were unsure or did not respond (9%).
 - The crosstabulations found that operators of commercial businesses that had been in operation for more than the median of 13 years, compared to operators of businesses operating for the median of 13 years or less, appeared more likely to know that swimming with, touching, or petting dolphins in the wild is *illegal and harmful*.

PARTICIPATION IN WATER-BASED RECREATION AND DOLPHIN-RELATED ACTIVITIES

- The top water-based recreational activities in which residents had participated in the Panama City area in the past two years were swimming at the beach, fishing, swimming from a boat, and snorkeling. Over a quarter of the resident sample had not participated in any of the activities the survey asked about within the past two years in Panama City.

- About one in ten residents had viewed dolphins as part of a paid wild dolphin-viewing tour in the Panama City area in the past two years (most of this group took part in a boat-based tour of some type). In the same time period, however, a quarter of residents went out specifically to view wild dolphins but not as part of a paid dolphin-viewing tour: the most common types of these outings were on boats belonging to the respondent or someone in the respondent's group, from a beach, pier, or shore, or from a jet ski.
 - Most residents who participated in wild dolphin-related activities in the Panama City area in the past two years did so no more than five times.
 - Just 8% of the resident sample had participated in wild dolphin-related activities in a location *other than* the Panama City area (excluding theme parks) in the two years prior to the survey, and the most common of these activities included viewing dolphins from a beach, pier, or shore and viewing dolphins from a type of boat other than a jet ski or kayak. Residents who engaged in wild dolphin-related activities *other than* in the Panama City area most often did so at other locations in Florida, or indicated no specific location (i.e., they viewed dolphins while participating in some other activity).

- The top water-based recreational activities in which visitors participated in the Panama City area in the past two years were swimming at the beach and fishing. A third of the visitors surveyed had not participated in any of the activities listed.

- The vast majority of the visitors surveyed indicated visiting the Panama City metro area for pleasure (as opposed to work). Among those who visited the Panama City metro area for pleasure, small percentages indicated that viewing dolphins in the wild was either their main reason (9%) or one of their reasons (9%) for visiting. Among visitors who visited the area

for pleasure and who indicated that viewing dolphins was the main reason or one of the main reasons for visiting, 18% viewed dolphins as part of a paid dolphin-viewing tour, and 18% viewed dolphins from another type of boat. Much smaller numbers of individuals within this group viewed dolphins from a jet ski, from a kayak, swam with dolphins in the wild, snorkeled with dolphins in the wild, or scuba dove with dolphins in the wild. Otherwise, 64% of visitors who visited the Panama City metro area for pleasure and who indicated that viewing dolphins was the main reason or one of the main reasons for visiting did not engage in any dolphin-viewing activities.

- Among all visitors surveyed (not just those who visited Panama City for pleasure or who visited for dolphin-related reasons), 12% viewed dolphins as part of a paid wild dolphin-viewing tour in the Panama City area in the past two years. In the same time period, 13% of visitors have gone out specifically to view wild dolphins but not as part of a paid dolphin-viewing tour: the most common types of these outings are from a beach, pier, or shore, or from a boat belonging to the respondent or someone in their group.
 - Half of those visitors who participated in wild dolphin-related activities in the Panama City area in the past two years did so just once.
 - Just over a tenth of visitors (12%) participated in wild dolphin-related activities in a location *other than* the Panama City area (excluding theme parks) in the two years prior to the survey, with the most common of these activities being viewing dolphins as part of a paid dolphin-viewing tour, viewing dolphins from a beach, pier, or shore, and viewing dolphins from a type of boat other than a jet ski or kayak. Visitors who engaged in wild dolphin-related activities *other than* in the Panama City area most often did so at other locations in Florida, in the Caribbean, Gulf of Mexico, or Central America, or in no specific location (i.e., they viewed dolphins while participating in some other activity).

RESIDENTS' AND VISITORS' ATTITUDES TOWARD FACTORS INFLUENCING THEIR USE OF BUSINESSES THAT PRACTICE RESPONSIBLE DOLPHIN VIEWING

- The resident and visitor surveys asked respondents about three different factors that could potentially influence their decision to use either a company that practiced responsible dolphin viewing methods or a company that did not, if they were to go on a dolphin-viewing trip.

Respondents were instructed to indicate whether each factor would be a *major* factor, a *minor* factor, or *not a factor at all*.

- Only one item was considered a *major* factor by a majority of both residents and visitors: if the company provided educational information about dolphins (57% of residents and 63% of visitors said this would be a *major* factor). The other factors—including the cost of the trip and how close customers would be able to get to the dolphins—were considered to be *major* factors by less than a majority of each respondent group. Thus, the availability of educational information about dolphins appears to outweigh the importance of both trip cost and proximity to dolphins when residents and visitors select a business for a dolphin viewing trip.

COMMERCIAL BUSINESS' CURRENT PARTICIPATION IN PUBLIC EDUCATION

- Just over half of the commercial business operators surveyed inform guests how to view wild dolphins without disturbing them *all the time*, while more than three-quarters inform guests about this at least *some of the time*. Similarly, half of the business operators surveyed inform guests why it is important to not disturb dolphins in the wild when viewing them *all the time*, while over two-thirds do so at least *some of the time*.
 - The most common educational methods/materials used by commercial businesses include onboard educational commentary and educational brochures or pamphlets. At the same time, about a quarter of businesses do not provide any methods or materials.
 - The crosstabulations found that operators of water-related rentals (e.g., boats, jet skis, kayaks) and guided tours or excursions (e.g., diving, wildlife viewing, dolphin tours), compared to the other types of businesses, appear more likely to inform guests how to view dolphins without disturbing them *all the time*, and more likely to inform guests why it is important to not disturb dolphins in the wild when viewing them *all the time*.
 - Operators of businesses in operation for the median of 13 years or less, compared to businesses in operation for more than the median of 13 years, appear more likely to inform guests how to view dolphins without disturbing them *all the time*, and more

- likely to inform guests why it is important to not disturb dolphins in the wild when viewing them *all the time*.
- Operators of non-vessel-based businesses, compared to operators of vessel-based businesses, appear more likely to say that they inform guests how to view dolphins without disturbing them *none of the time*.

COMMERCIAL BUSINESS' WILLINGNESS TO PARTICIPATE IN EDUCATIONAL WORKSHOPS AND PUBLIC EDUCATION

- Almost half of the business operators surveyed are willing to participate in a one-time educational workshop on how to view wild dolphins without disturbing them if the workshop was *free of charge*. However, just 10% would be willing to participate if the workshop were offered *at a low cost*. Meanwhile, 43% of business operators are not willing to participate in such a workshop.
 - Those who indicated being willing to participate in an educational workshop were asked what they thought would be a reasonable cost for a half-day workshop, and the median dollar amount response was \$45.
 - The crosstabulations found that operators of guided tours or excursions (e.g., diving, wildlife viewing, dolphin tours), compared to the other types of businesses, appear more likely to be willing to participate in a one-time educational workshop on how to view wild dolphins without disturbing them.
- A majority of the business operators surveyed (58%) said they would be willing to provide, display, or play pre-recorded educational materials to guests if provided with such materials free of charge.
 - Those willing to provide, display, or play such educational materials were asked which types they would be willing to distribute to the public, and the top answers were educational brochures or pamphlets, signs, stickers/vessel decals, and posters.

COMMERCIAL BUSINESS ATTITUDES TOWARD AND WILLINGNESS TO PARTICIPATE IN RESPONSIBLE VIEWING AND ADVERTISING

- When asked about a hypothetical incentive program for businesses that voluntarily help to enhance dolphin conservation by promoting responsible viewing and advertising and

providing guests with educational materials, business operators most commonly say that such a program would be *extremely* (38%) or *moderately* (25%) valuable. In total, more than three-quarters of the businesses surveyed view such a program as at least *a little* valuable.

- The crosstabulations found that operators of guided tours or excursions (e.g., diving, wildlife viewing, dolphin tours), compared to the other types of businesses, appear more likely to view the hypothetical responsible viewing incentive program as *extremely* valuable.
 - Operators of businesses that have been in operation for the median of 13 years or less, compared to operators of older businesses, appear more likely to view the hypothetical responsible viewing incentive program as *extremely* valuable.
 - Operators of non-vessel-based businesses, compared to operators of vessel-based businesses, appear more likely to view the hypothetical responsible viewing incentive program as *extremely* valuable.
- Business operators were asked to rate as *very*, *somewhat*, *a little*, or *not at all* important three factors potentially influencing their decision to take part in such a program: if the program had a low cost to participate, whether or not they personally saw the value in responsible viewing techniques, and if the program might cause them to lose business. Of these, the only factor to be rated as *very* important by a majority of the business operators surveyed was if the program might cause them to lose business (just over half of business operators describe this as a *very* important factor). The two other factors—whether or not the business operator saw the value in responsible viewing techniques and if the program had a low cost to participate—were rated as *very* important factors by 42% and 30% of the business operator sample, respectively.
- The crosstabulations found that operators of businesses that have been in operation for the median of 13 years or less, compared to operators of older businesses, appear more likely to consider each of the three factors to be *very* important factors (that the program might cause them to lose business, whether or not they personally saw the value in responsible viewing techniques, and if the program had a low cost to participate).

- Operators of vessel-based businesses, compared to operators of non-vessel-based businesses, appear more likely to consider if the program might cause them to lose business as a *very* important factor, and *less* likely to consider if the program had a low cost to participate as a *very* important factor potentially influencing their decision to take part in such a program.

OPINIONS ON THE EFFECTIVENESS OF VARIOUS OUTREACH METHODS

- All three groups were asked to rate the effectiveness of a series of delivery methods for public outreach and education on safe dolphin viewing.
 - In the ranking by the percentage rating each delivery method as *very* effective, the top-ranked delivery methods among residents include signs at marinas and boat ramps (rated as *very* effective by 60% of residents), information provided as part of boating safety education courses (57%), and public service announcements on TV (50%).
 - Among visitors, the top-ranked delivery methods were the Internet (rated as *very* effective by 59% of visitors), information provided as part of boating safety education courses (59%), signs at marinas and boat ramps (55%), public service announcements on TV (54%), and news reports on TV (52%).
 - Just two delivery methods stood out as the most important delivery methods rated as *very* important by business operators: signs at marinas and boat ramps (rated as *very* effective by 51% of business operators) and information provided as part of boating safety education courses (49%).
 - The crosstabulations found that operators of guided tours or excursions (e.g., diving, wildlife viewing, dolphin tours), compared to the other types of businesses, appear more likely to view information provided as part of boating safety education courses as a *very* effective delivery method. At the same time, operators of hospitality/tourist services businesses (e.g., retailers, restaurants, vacation rentals), compared to the other types of businesses, appear more likely to view signs at marinas and boat ramps as a *very* effective delivery method.
 - Operators of businesses that have been in operation for the median of 13 years or less, compared to operators of older businesses, appear more likely to consider billboards to be a *very* effective delivery method. On the other hand, operators of businesses

- that have been in operation for more than the median of 13 years appear more likely to public service announcements on TV, radio, or in magazines and newspapers to be *very* effective delivery methods.
- Operators of non-vessel-based businesses, compared to operators of vessel-based businesses, appear more likely to consider information provided as part of boating safety education courses, signs at marinas and boat ramps, public service announcements on TV, news reports on TV, and social media (e.g., Facebook, Twitter, podcasts) to be *very* effective delivery methods.

TABLE OF CONTENTS

Introduction and Methodology	1
Questionnaire Design	2
Survey Sampling Methodology	2
Panama City Residents and Visitors	2
Panama City Commercial Businesses	5
Interviewing Dates and Times	6
Follow-up Telephone Interviews	6
Data Analysis	7
Nonparametric Analysis	8
Interpreting the Nonparametric Analysis Results	14
Notes on Reading the Report	15
Attitudes Toward and Interest in Wild Dolphins and Dolphin-Human Interactions	17
Concern for the Protection of Wild Dolphins	17
Interest in Feeding and Interacting With Wild Dolphins	18
Sources of Interest and Information About Wild Dolphins and Dolphin-Human Interactions	19
Knowledge of the Legality of Dolphin-Human Interactions	65
Participation in Water-based Recreation and Dolphin-related Activities	80
Residents' and Visitors' Attitudes Toward Factors Influencing Their Use of Businesses That Practice Responsible Dolphin Viewing	96
Commercial Business Attitudes Toward Public Education and Responsible Dolphin Viewing	106
Current Participation in Public Education	106
Willingness to Participate in Educational Workshops and Public Education	106
Attitudes Toward and Willingness to Participate in Responsible Viewing and Advertising	107
Opinions on the Effectiveness of Various Outreach Methods	145
Demographic and Respondent Data	154
Resident Demographics	154
Visitor Demographics and Panama City Trip Characteristics	155
Characteristics of Commercial Businesses Surveyed	157
About Responsive Management	204

INTRODUCTION AND METHODOLOGY

This study was conducted for the National Oceanic and Atmospheric Administration's National Marine Fisheries Service (NMFS) to measure public awareness and knowledge of dolphin conservation, assess participation in marine recreational activities and interactions with wild dolphins, and determine the effectiveness of NMFS-supported public outreach efforts.

Specifically, the study was conducted to better understand the different audiences that participate in dolphin feeding and interactive activities with dolphins that in many cases amount to inadvertent harassment. A further objective of the research was to assess the effectiveness of outreach tools implemented as part of the "Protect Dolphins" campaign, and to determine if there are more appropriate or effective outreach tools that may better convey campaign messages to target audiences. Findings from this study will assist in the development of future outreach and campaign activities in Panama City, Florida and in other areas of the southeast United States.

Dolphin interactions with humans during commercial fishing operations or recreational marine activities are not uncommon due, in part, to the species' ubiquity in coastal waters and public affinity for this mammal. Further, coastal areas such as Panama City often promote attractions that may include dolphin viewing and/or swimming with dolphins. However, dolphins are protected under the Marine Mammal Protection Act (MMPA), with dolphin-human interaction regulated by the laws and guidelines mandated by the MMPA. Accordingly, over the past decade, NMFS has pursued a nationwide campaign to educate the public about the problems with feeding dolphins in the wild. Feeding and harassing wild dolphins (i.e., swimming with, touching, or petting them through means of close interaction) have been designated as actions harmful to the species and are therefore illegal under MMPA regulation 50 CFR 216. The "Protect Dolphins" campaign was initiated in 1997 and has entailed a series of outreach and communications strategies, including the development of dolphin viewing guidelines, a focused media campaign including public service announcements, and a series of town hall meetings designed to increase public awareness regarding the illegal feeding and harassment of wild dolphins. The central goal of the media campaign has been to educate the public and encourage responsible behaviors regarding these protected animals.

By exploring public awareness of and access to information concerning laws regulating the illegal feeding and harassment of wild dolphins, this study's purpose is to determine additional or new approaches to outreach and communication regarding these conservation concerns. The study entailed surveys of Panama City residents, visitors to Panama City, and commercial businesses located in Panama City. Specific aspects of the research methodology are discussed below.

QUESTIONNAIRE DESIGN

The study entailed three separate surveys developed for each respondent group (residents, visitors, and commercial business operators). The survey questionnaires were developed cooperatively by NMFS and Responsive Management, based on the research team's familiarity with public studies regarding natural resources and wildlife as well as the overall objectives of the project. Responsive Management conducted pre-tests of the questionnaire to ensure proper wording, flow, and logic in the survey.

SURVEY SAMPLING METHODOLOGY

Panama City Residents and Visitors

The resident and visitor surveys were conducted primarily through intercept interviews with randomly selected respondents, administered on-site in Panama City, Florida during four seasonal data collection periods. Intercept surveys are often employed when respondents cannot be easily reached at a later time because contact information is unavailable (e.g., visitors in a particular area). For this project, intercept surveys were conducted at locations in Panama City where individuals at least 18 years old were likely to have participated or be interested in water-based or dolphin-related activities relevant to the project.

Intercept surveys offer data acquisition at the place of interaction and allow for a qualitative assessment of respondents' answers. Also, proximity in geography and time allows for experiences, opinions, attitudes, and behaviors to be captured immediately before the effects of time may have lessened respondent reactions.

Responsive Management used random sampling to collect data representative of the general population and to ensure that local residents of and visitors to Panama City had equal chances of being selected for an interview. A key methodological parameter of the intercept interviews was to ensure that each selected respondent was not in any way affiliated with the previous respondent. Random sampling was accomplished through a systemized numerical approach used to dictate the individuals who were asked to complete a survey. In-person intercept surveys were conducted at or around various piers, visitor centers, marinas, and beachside hotels throughout the Panama City metro area. Further, to ensure an adequate representation of local residents and visitors among various seasons and times, surveys were conducted during four seasons from 2010-2011. To randomly identify respondents, interviewers canvassed high-traffic areas within Panama City, including locations along Front Beach Road (including the Pier Park shopping area), Thomas Drive, North Lagoon Drive, Upper Grand Lagoon, Lower Grand Lagoon, and around St. Andrew Bay. Inland locations were also visited in an effort to avoid a bias of including only those respondents near beaches; these locations included the Miracle Strip Business Plaza and the Promenade Shopping Mall, among others.

The following maps show some of the primary areas targeted for intercept interviews:

Fig. 1.1 Panama City Overall Sampling Area



Source: Google Maps

Fig. 1.2 Panama City Beachfront Sampling Areas

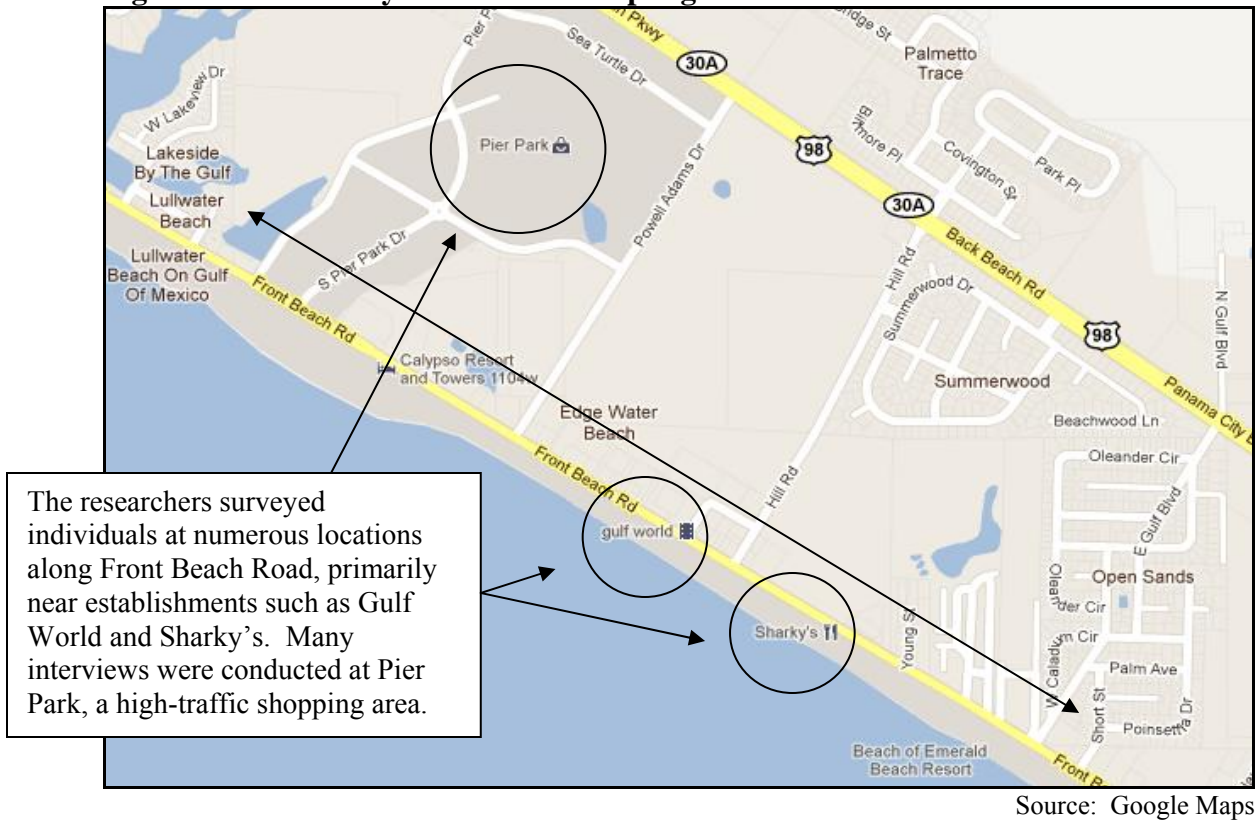
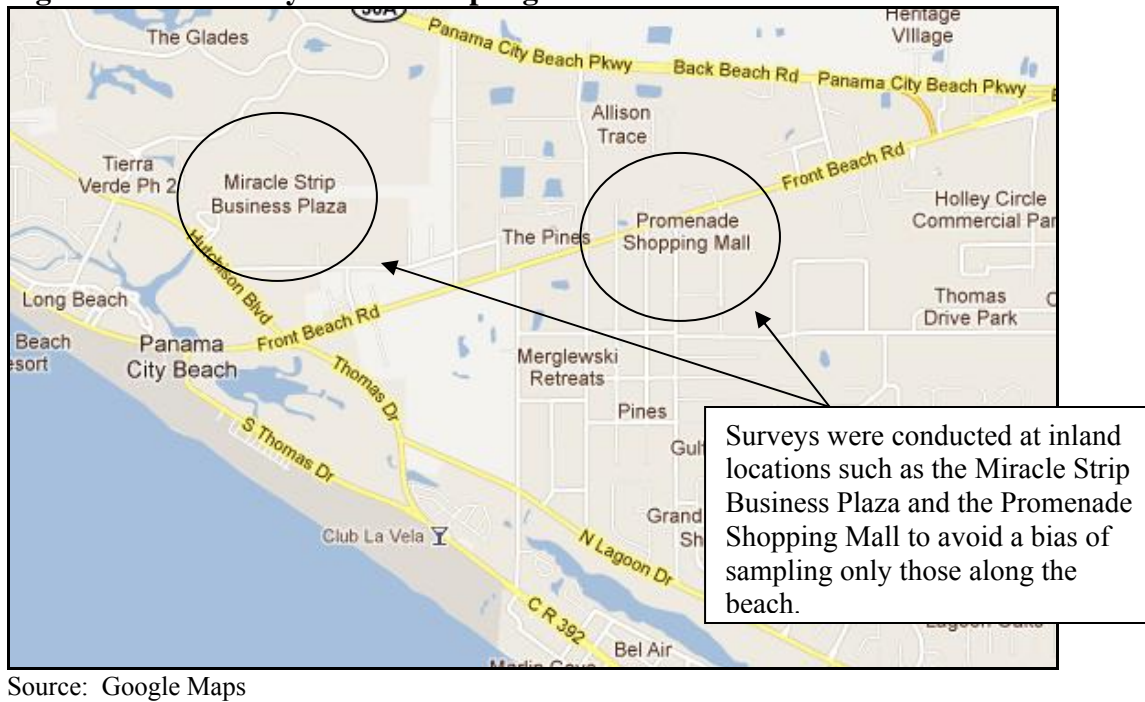


Fig. 1.3 Panama City Inland Sampling Areas



Because some people approached for an intercept survey were unable to complete the in-person interview (for example, individuals on vacation with their family or parents with children), the researchers prepared an alternative by providing these potential respondents with the option of being called to complete an interview later at a time more convenient to them. In such situations, the interviewer obtained the respondents' names and numbers so that a telephone survey could be completed a few days later. Although every effort was made to encourage the completion of a survey in real-time during the intercept interview, follow-up telephone surveys were used to supplement the sample as a means of ensuring that the survey results were not biased toward only those individuals able to participate in the on-site intercept interviews.

Panama City Commercial Businesses

The sample of commercial businesses was developed by Responsive Management, based in part on records maintained and supplied by NMFS for the project. For this respondent group, an attempt was made to conduct a census of businesses identified through Yellow Page- and Internet-based searches, as well as ground observation in tourist-heavy locations. Eligibility for the commercial business survey was based on the establishment's relevance to the project subject matter; the top priorities included tourism-related businesses with likely experience providing water-based recreational opportunities or interactions with marine mammals. The sample of commercial businesses included wildlife viewing providers, dive shops, tours and charter operators, equipment and supply rental shops (such as jet ski, kayak, and boat rentals), and recreational trip and guide businesses, as well as selected retailers and restaurants.

After compiling the list of eligible water-based and tourism-related businesses, the research team made contact through visits determined by appropriate interviewing times. Interview times for the businesses were generally intended to be during medium-peak times (unlike the resident and visitor surveys, which included some peak times) so as to avoid requesting interviews during busier peak times. An additional reason for interviewing during medium peak times was that some businesses closed during non-peak times and "off" seasons. Interviewers were instructed to conduct surveys with business owners and managers; when these individuals were not available, the survey administrator returned until contact with the appropriate party was made. As with the resident and visitor surveys, commercial business operators were provided an option

to complete the survey at a more convenient time by telephone. This was done to encourage the participation of commercial business managers and owners, who were able to schedule telephone interviews at their convenience so as to avoid interrupting customer transactions.

INTERVIEWING DATES AND TIMES

The data were primarily collected during four sessions from November 2010 to July 2011:

Season	Dates
Autumn Session	Saturday November 13, 2010 through Friday November 19, 2010
Winter Session	Monday February 7, 2011 through Sunday February 13, 2011
Spring Session	Monday May 9, 2011 through Sunday May 15, 2011
Summer Session	Monday July 11, 2011 through Sunday July 17, 2011

FOLLOW-UP TELEPHONE INTERVIEWS

As previously mentioned, telephone interviews were conducted with individuals who were selected to complete surveys but who declined or were unable to participate during the on-site data collection, and were used to supplement the overall sample and avoid non-response bias. In general, follow-up telephone interviews were encouraged over an alternative approach of issuing potential respondents a hard copy survey with a prepaid envelope and instructing them to mail in their response. By collecting contact information for a telephone interview, Responsive Management interviewers were able to make multiple attempts to contact individuals at later times (thereby eliminating the need to wait for surveys to arrive by mail). Additionally, telephone surveys, relative to mail or Internet surveys, provide higher quality data, obtain higher response rates, are more timely, and are more cost-effective. Telephone surveys also have fewer negative effects on the environment than do mail surveys because of reduced use of paper and reduced energy consumption for delivering and returning the questionnaires.

Surveying times for the follow-up telephone interviews were Monday through Friday from 9:00 a.m. to 9:00 p.m., Saturday from noon to 5:00 p.m., and Sunday from 5:00 p.m. to 9:00 p.m., local time. A five-callback design was used to maintain the representativeness of the sample, to avoid bias toward people easy to reach by telephone, and to provide an equal opportunity for all individuals who supplied contact information to participate. When a respondent could not be reached on the first call, subsequent calls were placed on different days of the week and at different times of the day. Follow-up telephone surveys were conducted on a rolling basis from November 2010 to July 2011, following the results of each round of on-site data collection.

A central polling site at the Responsive Management office allowed for rigorous quality control over the interviews and data collection. Responsive Management maintains its own in-house telephone interviewing facilities. These facilities are staffed by interviewers with experience conducting computer-assisted telephone interviews on the subjects of wildlife, outdoor recreation, and natural resources. To ensure the integrity of the telephone survey data, Responsive Management has interviewers who have been trained according to the standards established by the Council of American Survey Research Organizations. Methods of instruction included lecture and role-playing. The Survey Center Managers and other professional staff conducted a project briefing with the interviewers prior to the administration of this survey. Interviewers were instructed on type of study, study goals and objectives, handling of survey questions, interview length, termination points and qualifiers for participation, interviewer instructions within the survey questionnaire, reading of the survey questions, skip patterns, and probing and clarifying techniques necessary for specific questions on the survey questionnaire.

DATA ANALYSIS

Responsive Management obtained a total of 465 completed interviews, including 205 interviews with Panama City residents, 171 with visitors to Panama City, and 89 with commercial businesses located in Panama City. After the surveys were obtained by the interviewers, the Project Manager checked each completed survey to ensure clarity and completeness. The software used for entry of the hard copy survey data and for the telephone interviews was Questionnaire Programming Language (QPL). The survey questionnaire was programmed so

that QPL branched, coded, and substituted phrases in the survey based on previous responses to ensure the integrity and consistency of the data collection. The analysis of data was performed using Statistical Package for the Social Sciences as well as proprietary software developed by Responsive Management.

The total sample size on some questions is less than the total n-value for each respondent group because the survey asked some questions only of specific respondents in the survey. In particular, this was done when a follow-up question did not apply to some respondents. For instance, only those who indicated that they had seen or heard information about feeding dolphins from signs were asked follow-up questions about the types and locations of such signs.

On questions that asked respondents to provide a number (e.g., number of years lived in Panama City), the graph shows ranges of numbers rather than the precise numbers. Nonetheless, in the survey each respondent provided a precise number, and the dataset includes this precise number, even if the graph only shows ranges of numbers. Note that the calculation of means and medians used the precise numbers that the respondents provided.

Crosstabulations were run on some questions in the commercial business survey to determine any pertinent differences in answers based on key variables among respondents. These crosstabulations included the type or category of business, the number of years the business had been in operation (i.e., whether the business had been in operation above or below the median number of 13 years), and whether the business was vessel-based. Selected graphs from these crosstabulations are included in the survey results and identified as such.

NONPARAMETRIC ANALYSIS

For this report, nonparametric analyses examined how the various responses to questions on each survey related to participatory and demographic characteristics and opinions. Responses for selected questions were tested by means of z-scores for relationships to various characteristics (i.e., the characteristics as revealed by responses to other questions, including a series of demographic questions). A positive z-score means that the response and characteristic are

positively related; a negative z-score means that the response and characteristic are negatively related.

The z-score indicates the strength of the relationship between the characteristic and the response to the question. Those z-scores that have an absolute value of 3.30 or greater indicate a relationship that is so strong that it would happen by chance only 1 out of 1,000 times ($p \leq 0.001$). Those z-scores that have an absolute value of 2.58 to 3.29 indicate a relationship that is so strong that it would happen by chance only 1 out of 100 times ($p \leq 0.01$). Finally, those z-scores that have an absolute value of 1.96 to 2.57 indicate a relationship that is so strong that it would happen by chance only 5 out of 100 times ($p \leq 0.05$). The z-scores were calculated as shown in the formula below.

$$z = \frac{(p_1 - p_2)}{\sqrt{p(1-p) \left[\frac{1}{n_1} + \frac{1}{n_2} \right]}}$$

where:

n_1 represents the number of observations in Group 1.

n_2 represents the number of observations in Group 2.

$p_1 = a/(a + b) = a/n_1$ and represents the proportion of observations in Group 1 that falls in Cell *a*. It is employed to estimate the population proportion Π_1 (% of Group 1 who had specific characteristic).

$p_2 = c/(c + d) = c/n_2$ and represents the proportion of observations in Group 2 that falls in Cell *c*. It is employed to estimate the population proportion Π_2 (% of Group 2 who had specific characteristic).

$p = (a + c)/(n_1 + n_2) = (a + c)/n$ and is a pooled estimate of the proportion of respondents who had specific characteristic in the underlying population.

(Equation from *Handbook of Parametric and Nonparametric Statistical Procedures*, 2nd Edition by David J. Sheskin. © 2000, Chapman & Hall/CRC, Boca Raton, FL.)

The variables that were run in the nonparametric analyses are grouped into six categories, as shown in the tabulation on the next page. Following that tabulation, a second tabulation shows all the variables that were run in the nonparametric analysis of the survey of residents, and a third

tabulation shows all the variables that were run in the nonparametric analysis of the survey of visitors.

Z-Score Variable Categories for Both Resident and Visitor Surveys

1. PARTICIPATION: Participation in dolphin-viewing activities and water-based activities.
2. INTEREST: Interest in feeding and closely interacting with dolphins.
3. ATTITUDE: Attitudes toward factors that would affect decision-making regarding dolphin viewing.
4. KNOWLEDGE: Knowledge of legality / potential harm of feeding or closely interacting with dolphins.
5. INFORMATION: Information sources about feeding or closely interacting with dolphins.
6. DEMOGRAPHIC: Demographic characteristics, such as age, education, and gender.

Variables That Were Run in the Nonparametric Analysis of the Resident Survey

Z-SCORE VARIABLES—RESIDENT SURVEY
PARTICIPATION: Has viewed dolphins as part of a paid wild dolphin viewing tour in the Panama City area in the past 2 years.
PARTICIPATION: Has not viewed dolphins as part of a paid wild dolphin viewing tour in the Panama City area in the past 2 years.
PARTICIPATION: Has viewed dolphins on own in the Panama City area in the past 2 years (not as part of a paid wild dolphin viewing tour).
PARTICIPATION: Has not viewed dolphins on own in the Panama City area in the past 2 years.
PARTICIPATION: Has participated in at least one of the water-based activities listed in the survey in the Panama City area in the past 2 years.
PARTICIPATION: Has not participated in at least one of the water-based activities listed in the survey in the Panama City area in the past 2 years.
PARTICIPATION: Has participated in wild dolphin-related activities other than in the Panama City area in the past 2 years.
PARTICIPATION: Has not participated in wild dolphin-related activities other than in the Panama City area in the past 2 years.
PARTICIPATION: Owns a boat or jet ski.
PARTICIPATION: Does not own a boat or jet ski.
INTEREST: Is very interested in feeding dolphins in the wild.
INTEREST: Is not at all interested in feeding dolphins in the wild.
INTEREST: Is very interested in closely interacting with dolphins in the wild.
INTEREST: Is not at all interested in closely interacting with dolphins in the wild.
ATTITUDE: Is very concerned about protecting wild dolphins.
ATTITUDE: Is not at all concerned about protecting wild dolphins.
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says cost would be a major factor.
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that cost would be a major factor.
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says cost would be a major or minor factor.
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that cost would be a major or minor factor.
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major factor.
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that proximity to dolphins (how close he/she can get) would be a major factor.
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major or minor factor.

Z-SCORE VARIABLES—RESIDENT SURVEY
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that proximity to dolphins (how close he/she can get) would be a major or minor factor.
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major factor.
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that provision of educational information about dolphins would be a major factor.
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major or minor factor.
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that provision of educational information about dolphins would be a major or minor factor.
KNOWLEDGE: Indicated that feeding dolphins in the wild is illegal and harmful.
KNOWLEDGE: Did not indicate that feeding dolphins in the wild is illegal and harmful.
KNOWLEDGE: Indicated that feeding dolphins in the wild is harmful (but may or may not have correctly indicated that it is also illegal).
KNOWLEDGE: Did not indicate that feeding dolphins in the wild is harmful.
KNOWLEDGE: Indicated that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is illegal and harmful.
KNOWLEDGE: Did not indicate that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is illegal and harmful.
KNOWLEDGE: Indicated that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is harmful (but may or may not have correctly indicated that it is also illegal).
KNOWLEDGE: Did not indicate that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is harmful.
INFORMATION: Got information about feeding dolphins from a public service announcement.
INFORMATION: Did not get information about feeding dolphins from a public service announcement.
INFORMATION: Has heard or read something that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild.
INFORMATION: Has not heard or read something that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild.
INFORMATION: Got information about swimming with, touching, or petting dolphins from a public service announcement.
INFORMATION: Did not get information about swimming with, touching, or petting dolphins from a public service announcement.
DEMOGRAPHIC: Is a member of or has donated to a boating, fishing, recreation, or conservation organization.
DEMOGRAPHIC: Is not a member of nor has donated to a boating, fishing, recreation, or conservation organization.
DEMOGRAPHIC: Has lived in the Panama City area the median number of years (25) or less.
DEMOGRAPHIC: Has lived in the Panama City area longer than the median number of years (25).
DEMOGRAPHIC: Indicated being employed.
DEMOGRAPHIC: Did not indicate being employed.
DEMOGRAPHIC: Considers himself/herself to be white or Caucasian.
DEMOGRAPHIC: Does not consider himself/herself to be white or Caucasian.
DEMOGRAPHIC: Education level is a bachelor's degree (with or without a higher degree).
DEMOGRAPHIC: Education level is no higher than associate's or trade school degree.
DEMOGRAPHIC: Is 55 years old or older.
DEMOGRAPHIC: Is younger than 55 years old.
DEMOGRAPHIC: Is 65 years old or older.
DEMOGRAPHIC: Is younger than 65 years old.
DEMOGRAPHIC: Is male.
DEMOGRAPHIC: Is female.

Variables That Were Run in the Nonparametric Analysis of the Visitor Survey

Z-SCORE VARIABLES—VISITOR SURVEY
PARTICIPATION: Visited the Panama City area for pleasure.
PARTICIPATION: Did not indicate visiting the Panama City area for pleasure.
PARTICIPATION: Viewing dolphins in the wild was one of the reasons for visiting the Panama City area.
PARTICIPATION: Did not indicate that viewing dolphins in the wild was one of the reasons for visiting the Panama City area.
PARTICIPATION: Has viewed dolphins as part of a paid wild dolphin viewing tour in the Panama City area in the past 2 years.
PARTICIPATION: Has not viewed dolphins as part of a paid wild dolphin viewing tour in the Panama City area in the past 2 years.
PARTICIPATION: Has viewed dolphins on own in the Panama City area in the past 2 years (not as part of a paid wild dolphin viewing tour).
PARTICIPATION: Has not viewed dolphins on own in the Panama City area in the past 2 years.
PARTICIPATION: Has participated in at least one of the water-based activities listed in the survey in the Panama City area in the past 2 years.
PARTICIPATION: Has not participated in at least one of the water-based activities listed in the survey in the Panama City area in the past 2 years.
PARTICIPATION: Has participated in wild dolphin-related activities other than in the Panama City area in the past 2 years.
PARTICIPATION: Has not participated in wild dolphin-related activities other than in the Panama City area in the past 2 years.
PARTICIPATION: Owns a boat or jet ski.
PARTICIPATION: Does not own a boat or jet ski.
INTEREST: Is very interested in feeding dolphins in the wild.
INTEREST: Is not at all interested in feeding dolphins in the wild.
INTEREST: Is very interested in closely interacting with dolphins in the wild.
INTEREST: Is not at all interested in closely interacting with dolphins in the wild.
ATTITUDE: Is very concerned about protecting wild dolphins.
ATTITUDE: Is not at all concerned about protecting wild dolphins.
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says cost would be a major factor.
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that cost would be a major factor.
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says cost would be a major or minor factor.
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that cost would be a major or minor factor.
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major factor.
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that proximity to dolphins (how close he/she can get) would be a major factor.
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major or minor factor.
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that proximity to dolphins (how close he/she can get) would be a major or minor factor.
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major factor.
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that provision of educational information about dolphins would be a major factor.
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major or minor factor.

Z-SCORE VARIABLES—VISITOR SURVEY
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that provision of educational information about dolphins would be a major or minor factor.
KNOWLEDGE: Indicated that feeding dolphins in the wild is illegal and harmful.
KNOWLEDGE: Did not indicate that feeding dolphins in the wild is illegal and harmful.
KNOWLEDGE: Indicated that feeding dolphins in the wild is harmful (but may or may not have correctly indicated that it is also illegal).
KNOWLEDGE: Did not indicate that feeding dolphins in the wild is harmful.
KNOWLEDGE: Indicated that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is illegal and harmful.
KNOWLEDGE: Did not indicate that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is illegal and harmful.
KNOWLEDGE: Indicated that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is harmful (but may or may not have correctly indicated that it is also illegal).
KNOWLEDGE: Did not indicate that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is harmful.
INFORMATION: Has heard or read something that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild.
INFORMATION: Has not heard or read something that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild.
DEMOGRAPHIC: Is a member of or has donated to a boating, fishing, recreation, or conservation organization.
DEMOGRAPHIC: Is not a member of nor has donated to a boating, fishing, recreation, or conservation organization.
DEMOGRAPHIC: Indicated being employed.
DEMOGRAPHIC: Did not indicate being employed.
DEMOGRAPHIC: Considers himself/herself to be white or Caucasian.
DEMOGRAPHIC: Does not consider himself/herself to be white or Caucasian.
DEMOGRAPHIC: Education level is a bachelor's degree (with or without a higher degree).
DEMOGRAPHIC: Education level is no higher than associate's or trade school degree.
DEMOGRAPHIC: Is 55 years old or older.
DEMOGRAPHIC: Is younger than 55 years old.
DEMOGRAPHIC: Is 65 years old or older.
DEMOGRAPHIC: Is younger than 65 years old.
DEMOGRAPHIC: Is male.
DEMOGRAPHIC: Is female.

Each z-score calculation always looks at two groups: those with the characteristic compared to those without the characteristic. As an example, when the analysis is run on gender, it looks at males versus females. When the analysis is run on the variable, "Is very interested in feeding dolphins in the wild," it looks at those who say that they are very interested versus those who did *not* say very interested, which includes "somewhat interested," "not at all interested," and "don't know."

Some of the questions that were analyzed in the nonparametric analysis were analyzed in two ways. For instance, the nonparametric analysis of interest in feeding dolphins was run first by those who said very interested versus those who did *not* say very interested, as discussed in the preceding paragraph. It was then run on those who said not at all interested versus those who did *not* say not at all interested (i.e., they said very or somewhat interested or they responded with “don’t know”). Another example is the age variable. It was run on 55 years old and older versus younger than 55 years, and then it was run on 65 years old and older versus younger than 65 years. This allows some nuances of the data to be examined; for instance, an examination of younger versus older in general (using the 55 years old threshold) and then younger than the retirement age versus the retirement age or older (using the 65 years old threshold). In some cases, redundancies created by this analysis of some variables in two ways were removed for readability.

Interpreting the Nonparametric Analysis Results

When examining the correlations that are found in the z-score analysis, it is important to keep several points in mind. Most importantly, a correlation means simply that a response to a particular question is correlated to giving another response. For instance, in the resident survey, being male is correlated with having an education level of a bachelor’s degree or higher ($p \leq 0.05$). This simply means that males are *more likely* to have an education level of bachelor’s degree or higher than are females (among these survey respondents). This does not mean that *all* males in this survey have a bachelor’s degree, as some males obviously do not. Likewise, some females *do* have an education level of a bachelor’s degree or higher. The finding simply means that, in this survey, males are *more likely* to have that education level than are females.

Secondly, a finding that a characteristic is correlated to a response does not mean that a *majority* of those with that characteristic give that particular response; it simply means that those with that characteristic are *more likely* to give the particular response than are those without that characteristic (even in a situation where less than a majority of both groups give the particular response). For instance, those who own a boat or jet ski are more likely to have viewed dolphins in the Panama City area on their own than are those who do not own a boat or jet ski. This does *not* mean that a majority of those who own a boat or jet ski viewed dolphins on their own in the

Panama City area, as less than a majority did so (as did a less than a majority of those who do *not* own a boat or jet ski). It simply means that the boat/jet ski owner group is more likely to have viewed dolphins on their own than are those without boats/jet skis.

The nonparametric analyses results are tabulated following the graph of each pertinent question. Each tabulation has the variables grouped into the six overall categories. Within each category, the variables are ranked according to the strength of the correlation.

NOTES ON READING THE REPORT

In examining the results, it is important to be aware that the questionnaire included several types of questions:

- Open-ended questions are those in which no answer set is read to the respondents; rather, they can respond with anything that comes to mind from the question.
- Closed-ended questions have an answer set from which to choose.
- Some questions allow only a single response, while other questions allow respondents to give more than one response or choose all that apply. Those that allow more than a single response are indicated on the graphs with the label, "Multiple Responses Allowed."
- Many closed-ended questions (but not all) are in a scale, such as excellent-good-fair-poor.
- Many questions are part of a series, and the results are primarily intended to be examined relative to the other questions in that series (although results of the questions individually can also be valuable). Typically, results of questions in a series are shown on a single graph.

Some graphs show an average, either the mean or median (or both). The mean is simply the sum of all numbers divided by the number of respondents. Because outliers (extremely high or low numbers relative to most of the other responses) may skew the mean, the median may be shown. The median is the number at which half the sample is above and the other half is below. In other words, a median of 150 means that half the sample gave an answer of more than 150 and the other half gave an answer of less than 150.

Most graphs show results rounded to the nearest integer; however, all data are stored in decimal format, and all calculations are performed on unrounded numbers. For this reason, some results may not sum to exactly 100% because of this rounding on the graphs. Additionally, rounding may cause apparent discrepancies of 1 percentage point between the graphs and the reported

results of combined responses (e.g., when “strongly support” and “moderately support” are summed to determine the total percentage in support).

Many of the same questions were asked in all three surveys. In some cases, the survey results are shown on the same graph, with results from the three respondent groups tabulated separately. In other sections, results from the same question are shown separately in order to more easily differentiate between answers or rankings from the three groups of respondents.

The wording on some questions in the surveys conducted via follow-up telephone interviews with residents and visitors was adjusted to account for the difference in timeframe. For example, questions in the original visitor survey referring to “this trip to Panama City” were later changed to “your last trip to Panama City” in interviews conducted several weeks after the initial contact with the respondent. Finally, it should be noted that because the hard copy survey questionnaires were later coded into QPL survey instruments, the question numbering shown on the graphs in this report necessarily differs from the numbering in the original documents due to the addition of skip-out branching and various error checks inserted throughout the surveys.

ATTITUDES TOWARD AND INTEREST IN WILD DOLPHINS AND DOLPHIN-HUMAN INTERACTIONS

CONCERN FOR THE PROTECTION OF WILD DOLPHINS

- Large majorities of the three groups say they are concerned about protecting wild dolphins, with respondents most commonly indicating that they are *very* concerned:
 - Among **residents**, 88% say they are at least *a little* concerned about protecting wild dolphins (60% say they are *very* concerned).
 - Among **visitors**, 91% are at least *a little* concerned (47% say they are *very* concerned).
 - The nonparametric analysis found that, among both residents and visitors, those *very* concerned about protecting wild dolphins are also more likely to be *very* interested in closely interacting with dolphins in the wild. Residents and visitors *very* concerned about protecting wild dolphins are also more likely to be members of or to have donated to a boating, fishing, recreation, or conservation organization.
 - Conversely, residents who say they are *not at all* concerned about protecting wild dolphins are more likely to be 65 years old or older.
 - Among **business operators**, 84% are at least *a little* concerned (55% say they are *very* concerned).
 - The crosstabulations revealed that, among commercial businesses, water-related rentals (e.g., boats, jet skis, or kayaks) and guided tours or excursions (e.g., diving, wildlife viewing, dolphin tours) are the types of businesses most likely to be *very* concerned about protecting wild dolphins. Conversely, chartered fishing trip providers appear the least likely to indicate being concerned about protecting wild dolphins. (The other business types included hospitality or tourism services, such as retailers, restaurants, or vacation rentals; and marine-related services, such as those providing boating lessons, license courses, or operators of piers or marinas).
 - Operators of newer businesses (i.e., those that had been in operation for the median of 13 years or less), compared to operators of older businesses (i.e., those that had been in operation for more than the median of 13 years), appear more likely to be *very* concerned about protecting wild dolphins. (Operators of older businesses are more likely to say they are *somewhat* concerned about protecting wild dolphins.)

- Operators of non-vessel-based businesses, compared to operators of vessel-based businesses, appear slightly more likely to be *very* or *somewhat* concerned about protecting wild dolphins.

INTEREST IN FEEDING AND INTERACTING WITH WILD DOLPHINS

- Although both residents and visitors most commonly say they are *not at all* interested in feeding dolphins in the wild, visitors appear more likely than residents to express interest in doing so:
 - Just over half of **residents** (56%) say they are *not at all* interested in feeding dolphins in the wild; meanwhile, 15% are either *very* or *somewhat* interested.
 - Among **visitors**, a little more than a third (36%) are *not at all* interested in feeding dolphins in the wild, while about a quarter are either *very* (24%) or *somewhat* (23%) interested.
- Regarding closely interacting with dolphins in the wild (i.e., swimming with, touching, or petting them), visitors again appear slightly more likely to show some interest compared to residents (although both groups most commonly say they are *not at all* interested):
 - Half of **residents** (52%) say they are *not at all* interested in closely interacting with dolphins in the wild; otherwise, 20% are *very* interested, 11% *somewhat* interested, and 14% *a little* interested.
 - Among **visitors**, 43% indicate being *not at all* interested in closely interacting with dolphins in the wild, while 20% are *very* interested, 22% *somewhat* interested, and 13% *a little* interested.
 - The nonparametric analysis found that residents and visitors who say they are *very* interested in closely interacting with dolphins in the wild are also more likely to have viewed dolphins on their own in the Panama City area in the past two years; to be *very* concerned about protecting wild dolphins; to be *very* interested in feeding dolphins in the wild; and to be younger than 55 years old.

SOURCES OF INTEREST AND INFORMATION ABOUT WILD DOLPHINS AND DOLPHIN-HUMAN INTERACTIONS

This section presents the results regarding information sources by respondent type. Although the survey results from the three groups are tabulated on the same graphs in this section, the discussions below are separated by respondent type.

Resident Results

- **Residents** who indicated being at all interested in feeding or closely interacting with dolphins in the wild were asked a follow-up question regarding what had created their interest or desire to do these things. Television was the most commonly named source of interest or desire, with 35% of residents citing it. A second tier of sources cited by about a fifth of residents includes movies (22%), aquariums (22%), and word of mouth (19%). Notable percentages of residents also named personal experiences (15%) and zoos or wildlife parks (14%).

- All **residents** (not just those who had indicated interest in feeding or interacting with dolphins) were presented with a list of information sources and asked if they had heard or read about *feeding dolphins* from each item. The top source from which residents had heard or read about feeding dolphins was television news (44%), followed by newspaper articles (32%), public service announcements (30%), and signs (28%). About a fifth of residents heard or read about feeding dolphins in brochures (20%), on the Internet (20%), and at zoological or nature centers (18%). Meanwhile, 22% of the residents surveyed indicated being unsure whether they had heard or read about feeding dolphins from the sources in the list.
 - The nonparametric analysis found that residents who have heard or read about feeding dolphins from public service announcements were more likely to correctly indicate, in later questions, that both feeding and swimming with, touching, or petting dolphins in the wild are *illegal and harmful*. Residents who have heard or read about feeding dolphins from public service announcements are also more likely to be employed and younger than 65 years old.

- Those **residents** who indicated having heard or read about *feeding dolphins* from each primary source in the above list were asked to specify from follow-up lists where they had seen or read the source:
- **Signs:** residents who had heard or read about feeding dolphins from signs most commonly saw the signs at docks or marinas (60%), followed by visitor centers (32%) and fishing piers (28%).
 - **Brochures:** residents who had heard or read about feeding dolphins from brochures most commonly saw or obtained the brochures from visitor centers (41%), zoos or aquariums (37%), boat rental companies (27%), and government agencies (24%).
 - **Public service announcements:** residents who had heard or read about feeding dolphins from public service announcements most commonly saw or heard the PSAs on animal-related TV channels or during animal-related TV show (45%), and on non-wildlife-related TV channels (34%).
 - **Zoological/nature centers:** residents who had heard or read about feeding dolphins from zoological/nature centers most commonly cited zoos, aquariums, or wildlife-themed parks (73%), while about a third (32%) cited city, county, or state parks.
 - **Internet:** residents who had heard or read about feeding dolphins on the Internet most commonly cited the Florida Visitor Bureau website or a similar local tourism website (45%), followed by environmental, conservation, or other non-profit organizational websites (23%), federal, state, or local government websites (20%), and news-related websites (20%).
 - **Television news:** residents who had heard about feeding dolphins from television news were far more likely to cite local news (80%) than national news (22%).
 - **Newspapers:** residents who had heard or read about feeding dolphins from newspapers were again far likelier to point to local newspapers (91%) than national ones (12%).
 - Residents who indicated having heard or read about feeding dolphins from another source (i.e., the “other” option in the list) most commonly mentioned general word of mouth (58%), followed by nature or wildlife tours (23%).
- Just over a fifth of **residents** (23%) have heard or read something that makes it seem that it is all right to *swim with, touch, or pet dolphins* in the wild. Among this group, television is the

most commonly named source for such information (cited by 36% of residents who said they had heard or read information that made it seem that it is all right to swim with, touch, or pet dolphins in the wild), followed fairly distantly by commercial tour operations (21%), aquariums (17%), and general word of mouth (17%).

- As before, all **residents** were presented with a list of information sources and asked whether they had heard or read about *swimming with, touching, or petting dolphins* from each item. Note that the ranking of information sources for this topic closely mirrors residents' ranking of sources for *feeding* dolphins: the top source was again television news (41%), followed by newspaper articles (24%), public service announcements (20%), and signs (20%). Smaller percentages had heard or read about swimming with, touching, or petting dolphins in the wild from zoological or nature centers (15%), brochures (13%), or the Internet (12%). Finally, nearly a third of residents (31%) were unsure whether they had heard or read about swimming with, touching, or petting dolphins from the sources in the list.

- Those **residents** who said they had heard or read about *swimming with, touching, or petting dolphins* from each primary source in the above list were asked to specify from follow-up lists where they had seen or read the source (note that the follow-up lists consisted of the same items asked about in the previous questions regarding information sources for *feeding* dolphins):
 - **Signs:** residents who had heard or read about swimming with, touching, or petting dolphins in the wild from signs most commonly saw the signs at docks or marinas (60%), visitor centers (40%) and fishing piers (30%).
 - **Brochures:** residents who had heard or read about swimming with, touching, or petting dolphins in the wild from brochures most commonly saw or obtained the brochures from businesses (67%), visitor centers (50%), boat rental companies (38%), and zoos or aquariums (38%).
 - **Public service announcements:** residents who had heard or read about swimming with, touching, or petting dolphins in the wild from public service announcements most commonly saw or heard the PSAs on animal-related TV channels or during animal-

related TV show (51%), followed by the radio (29%) and on non-wildlife-related TV channels (24%).

- **Zoological/nature centers:** residents who had heard or read about swimming with, touching, or petting dolphins in the wild from zoological/nature centers most commonly cited zoos, aquariums, or wildlife-themed parks (77%), with about a fifth (19%) citing city, county, or state parks.
- **Internet:** residents who had heard or read about swimming with, touching, or petting dolphins in the wild on the Internet most commonly cited the Florida Visitor Bureau website or a similar local tourism website (54%), followed by environmental, conservation, or other non-profit organizational websites (29%), news-related websites (17%), and federal, state, or local government websites (13%).
- **Television news:** residents who had heard about swimming with, touching, or petting dolphins in the wild from television news were again more likely to cite local news (76%) than national news (29%).
- **Newspapers:** residents of those who heard or read about swimming with, touching, or petting dolphins in the wild from newspapers cited local newspapers (94%).
- Residents who indicated having heard or read about swimming with, touching, or petting dolphins in the wild from another source (i.e., the “other” option in the list) most commonly mentioned general word of mouth (44%), followed by nature or wildlife tours (19%).

Visitor Results

- **Visitors** who indicated being at all interested in feeding or closely interacting with dolphins in the wild most commonly named television as a source of their interest, with 32% citing it. This was followed by a second tier of sources that included aquariums (17%), word of mouth (17%), and zoos or wildlife parks (14%).
- As in the resident survey, all **visitors** (not just those who had indicated interest in feeding or interacting with dolphins) were presented with a list of information sources and asked if they had heard or read about *feeding dolphins* from each item. The top source from which visitors had heard or read about feeding dolphins was television news (22%), followed by the

Internet (15%). Relatively small percentages named newspaper articles (11%), brochures (11%), zoological or nature centers (11%), signs (10%), and PSAs (8%), while half the sample of visitors (49%) were unsure or had not heard or read anything from the listed sources.

- **Visitors** who indicated having heard or read about *feeding dolphins* from the primary sources listed above specified from follow-up lists where they had seen or read the source:
- **Signs:** visitors who had heard or read about feeding dolphins from signs most commonly saw the signs at fishing piers (41%), visitor centers (41%) and docks/marinas (29%).
 - **Brochures:** visitors who had heard or read about feeding dolphins from brochures most commonly saw or obtained the brochures from visitor centers (39%), boat rental companies (28%), and zoos or aquariums (22%).
 - **Public service announcements:** visitors who had heard or read about feeding dolphins from public service announcements most commonly saw or heard the PSAs on animal-related TV channels or during animal-related TV show (36%), and on non-wildlife-related TV channels (36%).
 - **Zoological/nature centers:** visitors who had heard or read about feeding dolphins from zoological/nature centers most commonly cited zoos, aquariums, or wildlife-themed parks (78%).
 - **Internet:** visitors who had heard or read about feeding dolphins on the Internet most commonly cited the Florida Visitor Bureau website or a similar local tourism website (36%), and news-related websites (28%).
 - **Television news:** in contrast to residents, visitors who had heard about feeding dolphins from television news were more likely to cite national news (70%) than local news (46%).
 - **Newspapers:** like residents, visitors who had heard or read about feeding dolphins from newspapers were more likely to cite local newspapers (79%) than national ones (16%).
 - Visitors who indicated having heard or read about feeding dolphins from another source (i.e., the “other” option in the list) most commonly mentioned general word of mouth (25%), billboards (25%), and magazines/books (17%).

- More than a quarter of **visitors** (29%) have heard or read something that makes it seem that it is all right to *swim with, touch, or pet dolphins* in the wild. Among this group, television is the most commonly named source for such information (33% of visitors who had heard or read information that made it seem that it is all right to swim with, touch, or pet dolphins in the wild named television as a source of this information). This was followed by general word of mouth (27%), commercial tour operations (18%), and advertisements (14%).
- As in the resident survey, all **visitor** respondents were given a list of information sources and asked whether they had heard or read about *swimming with, touching, or petting dolphins* from each item. The top source was television news (19%), followed by brochures (14%), the Internet (12%), zoological or nature centers (11%), signs (9%), newspaper articles (6%), and public service announcements (5%). Just under half of the sample of visitors (45%) were unsure or had not heard or read about swimming with, touching, or petting dolphins from the sources in the list.
- Those **visitors** who said they had heard or read about *swimming with, touching, or petting dolphins* from each primary source in the above list were asked to specify from follow-up lists where they had seen or read the source:
- **Signs:** visitors who had heard or read about swimming with, touching, or petting dolphins in the wild from signs most commonly saw the signs at fishing piers (47%), visitor centers (40%), and docks or marinas (33%).
 - **Brochures:** visitors who had heard or read about swimming with, touching, or petting dolphins in the wild from brochures most commonly saw or obtained the brochures from visitor centers (46%), boat rental companies (25%), businesses (25%), and zoos or aquariums (17%).
 - **Public service announcements:** visitors who had heard or read about swimming with, touching, or petting dolphins in the wild from public service announcements most commonly saw or heard the PSAs on animal-related TV channels or during animal-related TV show (63%), and on non-wildlife-related TV channels (38%).
 - **Zoological/nature centers:** visitors who had heard or read about swimming with, touching, or petting dolphins in the wild from zoological/nature centers most often named

zoos, aquariums, or wildlife-themed parks (83%), with about a fifth (22%) citing city, county, or state parks.

- **Internet:** visitors who had heard or read about swimming with, touching, or petting dolphins in the wild on the Internet most commonly cited the Florida Visitor Bureau website or a similar local tourism website (33%), news-related websites (24%), and environmental, conservation, or other non-profit organizational websites (19%).
- **Television news:** visitors who had heard about swimming with, touching, or petting dolphins in the wild from television news were again more likely to cite national news (69%) than local news (41%).
- **Newspapers:** most visitors who heard or read about swimming with, touching, or petting dolphins in the wild from newspapers cited local newspapers (73%), although a sizable percentage said national newspapers (45%).
- Visitors who had heard or read about swimming with, touching, or petting dolphins in the wild from another source (i.e., the “other” option in the list) most commonly named personal experience (33%), billboards (22%), and books/magazines (22%).

Commercial Business Results

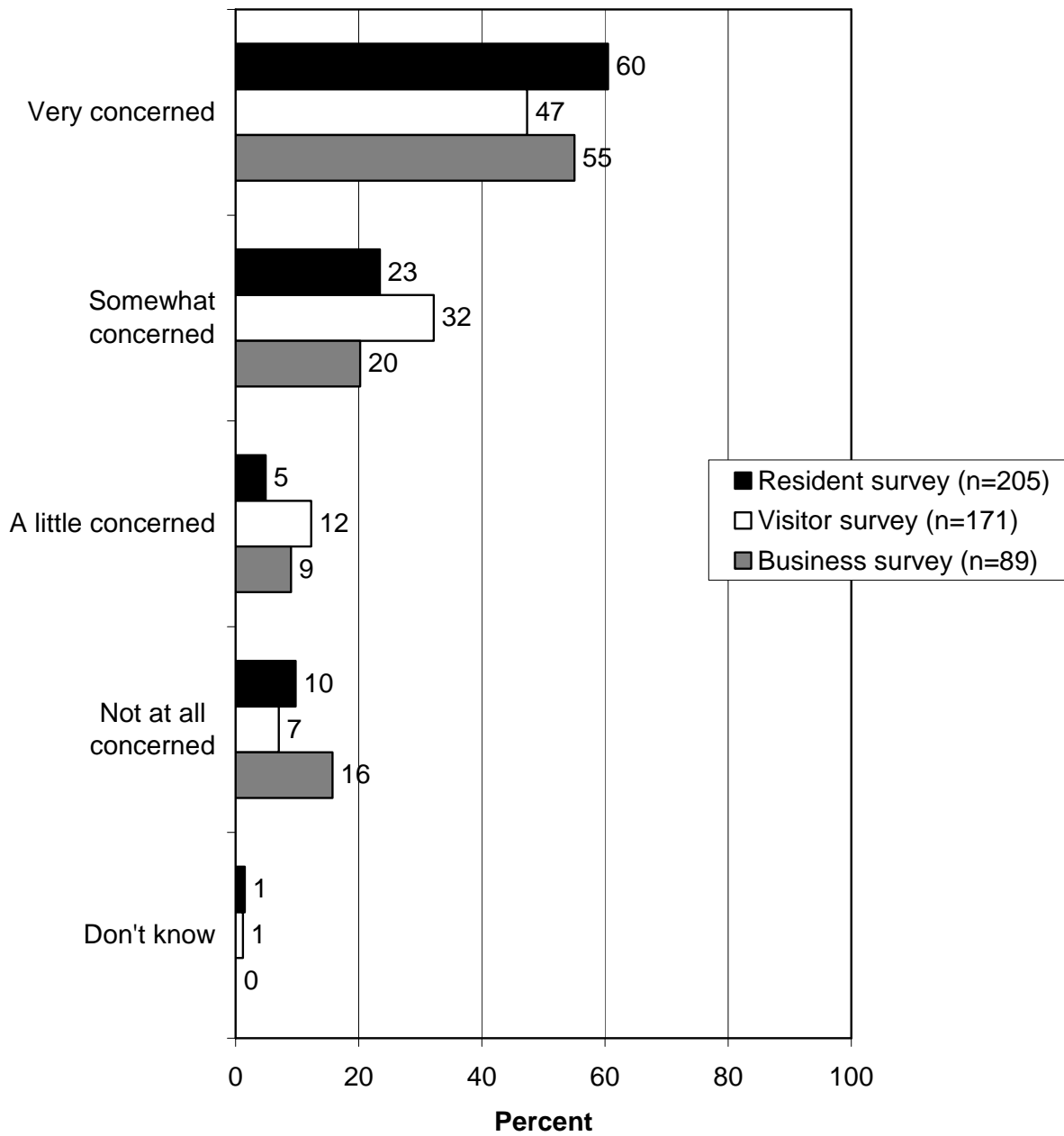
- As in the other surveys, **business operators** were presented with a list of information sources and asked if they had heard or read about *feeding dolphins* from each item. The top sources from which business operators had heard or read about feeding dolphins were brochures (54%) and signs (52%). Newspaper articles (39%), television news (38%), public service announcements (33%), and the Internet (20%) account for the remainder of the ranking, while more than a third of the business operators surveyed (36%) indicated having heard or read about feeding dolphins from other sources.
- **Business operators** that indicated having heard or read about *feeding dolphins* from the primary sources listed above specified from follow-up lists where they had seen or read the source:
 - **Signs:** business operators who had heard or read about feeding dolphins from signs most commonly cited signs at docks or marinas (72%), although notable percentages also named signs at fishing piers (28%) and visitor centers (28%).

- **Brochures:** business operators who had heard or read about feeding dolphins from brochures most commonly indicated that such brochures were from government agencies (46%), with smaller percentages indicating boat rental companies (17%) and visitor centers (13%).
 - **Public service announcements:** there were several ways in which business operators heard or read about feeding dolphins from public service announcements: in newspapers (41%), on non-wildlife-related TV channels (34%), animal-related TV channels or during animal-related TV show (28%), in magazines (28%) and on the radio (21%).
 - **Internet:** business operators who had heard or read about feeding dolphins on the Internet most commonly cited environmental, conservation, or other non-profit organizational websites (50%), federal, state, or local government websites (50%), and the website of the Florida Visitor Bureau or a similar local tourism website (28%).
 - **Television news:** business operators who had heard about feeding dolphins from television news were far more likely to cite local news (91%) than national news (6%).
 - **Newspapers:** similar to the above, business operators who had heard or read about feeding dolphins from newspapers were much likelier to name local newspapers (94%) compared to national ones (3%).
 - Business operators who indicated having heard or read about feeding dolphins from another source (i.e., the “other” option in the list) most commonly mentioned general word of mouth (47%), followed by nature or wildlife tours (25%) and billboards (22%).
- More than a third of **business operators** (38%) have heard or read something that makes it seem that it is all right to *swim with, touch, or pet dolphins* in the wild. Among this group, advertisements are by far the most commonly named source for such information (65% of business operators who said they had heard or read information that made it seem that it is all right to swim with, touch, or pet dolphins in the wild cited advertisements). This was distantly followed by television (35%), commercial tour operations (35%), magazines (32%), and general word of mouth (29%). Other common sources include newspapers (24%), zoos or wildlife parks (24%), aquariums (21%), radio (18%), and movies (18%).

- As before, **business operators** were presented with a list of information sources and asked whether they had heard or read about *swimming with, touching, or petting dolphins* from each item. The top source was brochures (44%), followed by signs (36%), television news (31%), public service announcements (30%), newspaper articles (25%), and the Internet (20%). A quarter of business operators (25%) had heard or read about swimming with, touching, or petting dolphins in the wild from other sources, and a third (33%) were unsure whether they had heard or read anything on the topic from the sources in the list.
- Those **business operators** who said they had heard or read about *swimming with, touching, or petting dolphins* from each primary source in the above list were asked to specify from follow-up lists where they had seen or read the source:
- **Signs:** business operators who had heard or read about swimming with, touching, or petting dolphins in the wild from signs most commonly saw the signs at docks or marinas (71%), followed by visitor centers (29%) and fishing piers (24%).
 - **Brochures:** business operators who had heard or read about swimming with, touching, or petting dolphins in the wild from brochures most commonly saw or obtained the brochures from boat rental companies (36%), visitor centers (33%), government agencies (33%), and zoos or aquariums (21%).
 - **Public service announcements:** business operators who had heard or read about swimming with, touching, or petting dolphins in the wild from public service announcements most commonly saw or heard the PSAs on the radio (33%), on non-wildlife-related TV channels (26%), and in newspapers (26%). Smaller percentages saw PSAs on animal-related TV channels or during animal-related TV shows (19%) and in magazines (15%).
 - **Internet:** business operators who had heard or read about swimming with, touching, or petting dolphins in the wild on the Internet most commonly cited environmental, conservation, or other non-profit organizational websites (44%), federal, state, or local government websites (33%), and the Florida Visitor Bureau website or a similar local tourism website (28%).

- **Television news:** business operators who had heard about swimming with, touching, or petting dolphins in the wild from television news were more likely to cite local news (96%) than national news (4%).
- **Newspapers:** similar to the above, business operators who heard or read about swimming with, touching, or petting dolphins in the wild from newspapers cited local newspapers (95%) over national ones (5%).
- Business operators who indicated having heard or read about swimming with, touching, or petting dolphins in the wild from another source (i.e., the “other” option in the list) most commonly mentioned general word of mouth (55%), followed by nature or wildlife tours (32%), billboards (27%), and advertisements in general (23%).

Q14/Q16/Q1. How much would you say you are concerned about protecting wild dolphins?



Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—ATTITUDE: Is very concerned about protecting wild dolphins
INTEREST: Is very interested in closely interacting with dolphins in the wild ($p \leq 0.01$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major factor ($p \leq 0.001$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major or minor factor ($p \leq 0.001$).
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that cost would be a major or minor factor ($p \leq 0.05$).
KNOWLEDGE: Indicated that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is illegal and harmful ($p \leq 0.05$).
KNOWLEDGE: Indicated that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is harmful (but may or may not have correctly indicated that it is also illegal) ($p \leq 0.05$).
DEMOGRAPHIC: Is a member of or has donated to a boating, fishing, recreation, or conservation organization ($p \leq 0.05$).

See page 14, “Interpreting the Nonparametric Analysis Results,” for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

VISITOR SURVEY—ATTITUDE: Is very concerned about protecting wild dolphins
INTEREST: Is very interested in feeding dolphins in the wild ($p \leq 0.001$).
INTEREST: Is very interested in closely interacting with dolphins in the wild ($p \leq 0.01$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major factor ($p \leq 0.001$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major or minor factor ($p \leq 0.01$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major or minor factor ($p \leq 0.05$).
DEMOGRAPHIC: Is a member of or has donated to a boating, fishing, recreation, or conservation organization ($p \leq 0.05$).

See page 14, “Interpreting the Nonparametric Analysis Results,” for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—ATTITUDE: Is not at all concerned about protecting wild dolphins
INTEREST: Is not at all interested in closely interacting with dolphins in the wild ($p \leq 0.01$).
INTEREST: Is not at all interested in feeding dolphins in the wild ($p \leq 0.05$).
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that provision of educational information about dolphins would be a major or minor factor ($p \leq 0.001$).
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that provision of educational information about dolphins would be a major factor ($p \leq 0.01$).
INFORMATION: Did not get information about feeding dolphins from a public service announcement ($p \leq 0.01$).
DEMOGRAPHIC: Is 65 years old or older ($p < 0.05$).

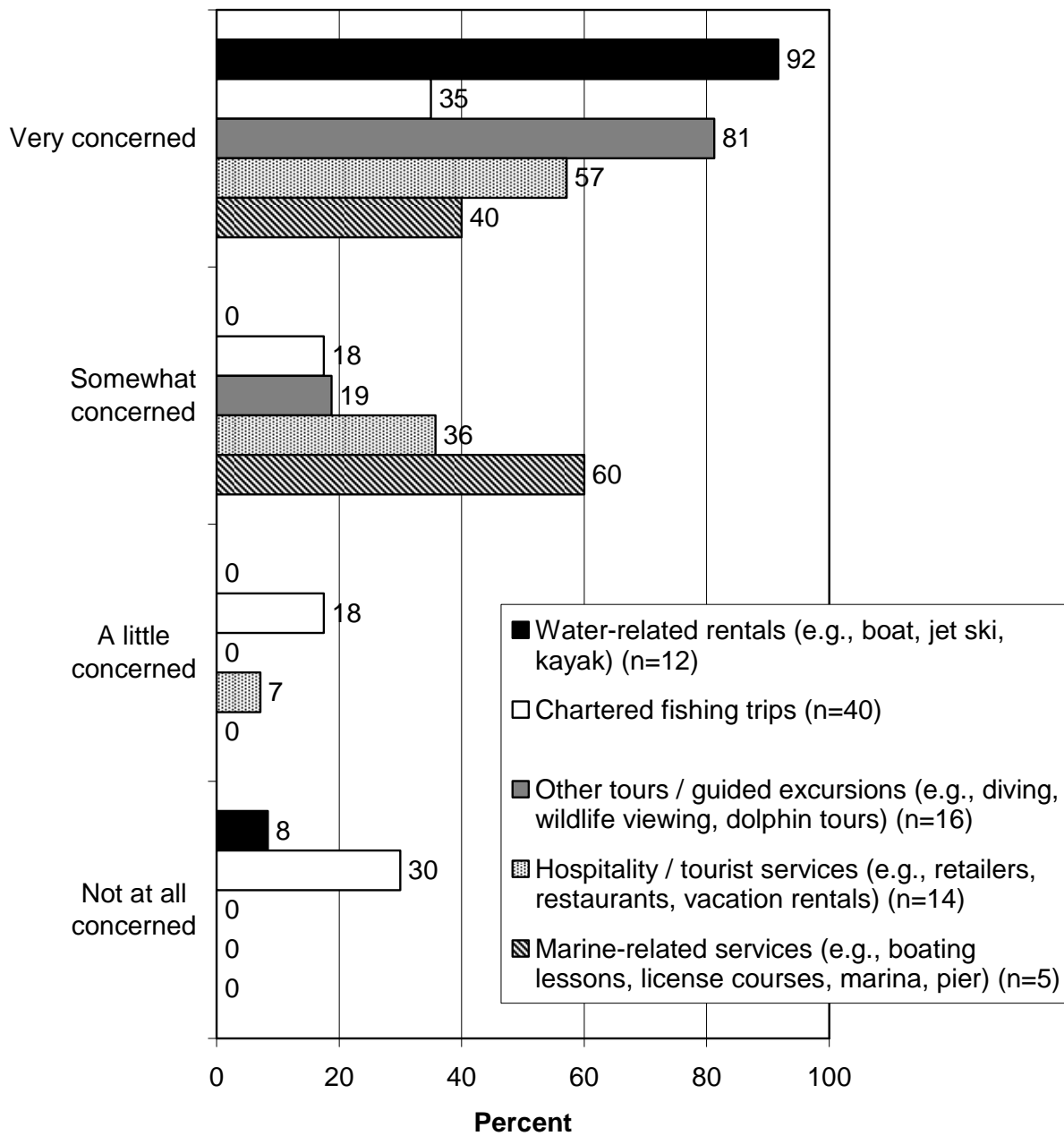
See page 14, “Interpreting the Nonparametric Analysis Results,” for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

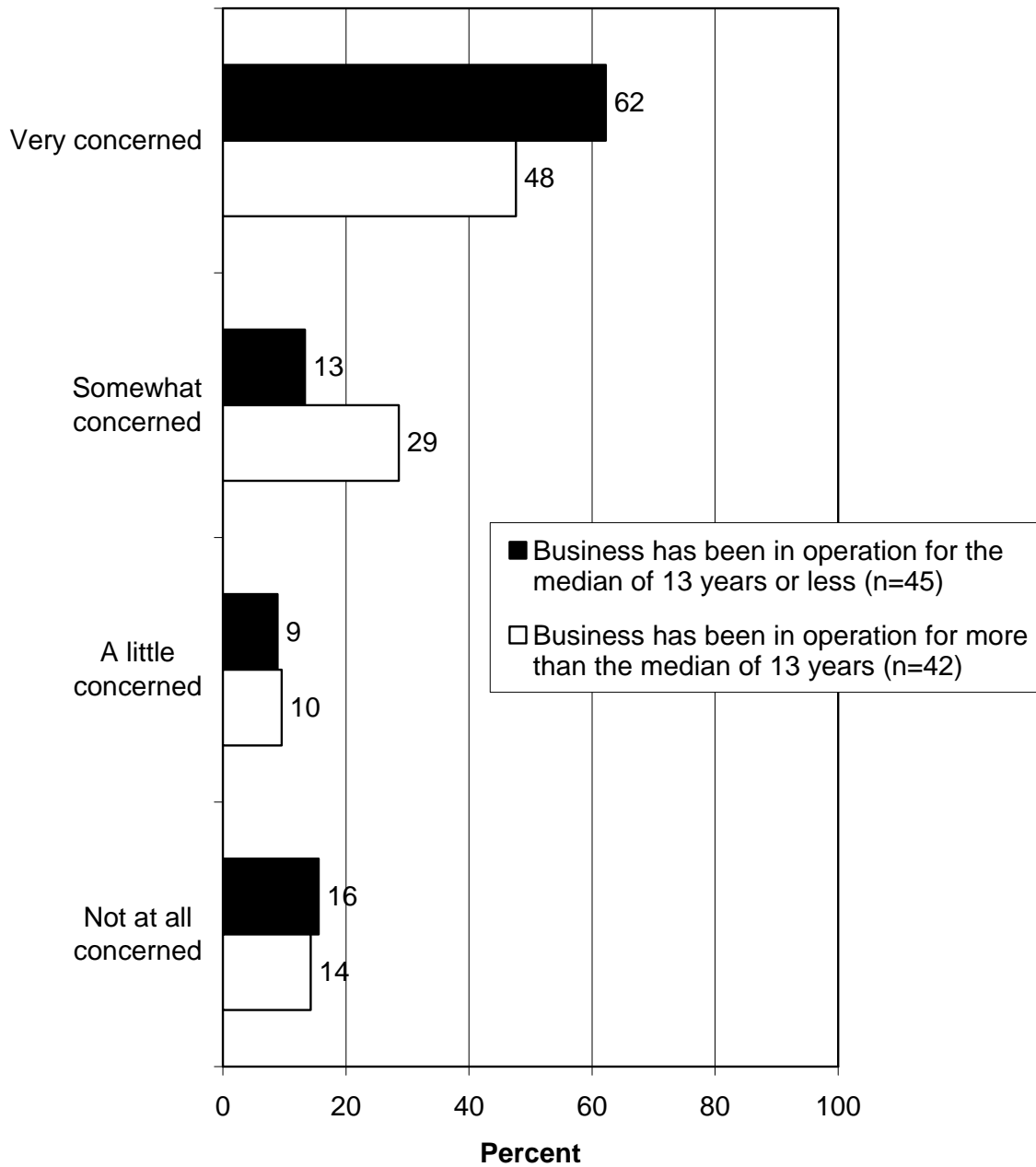
VISITOR SURVEY—ATTITUDE: Is not at all concerned about protecting wild dolphins
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that provision of educational information about dolphins would be a major factor ($p \leq 0.001$).
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that provision of educational information about dolphins would be a major or minor factor ($p \leq 0.001$).
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that proximity to dolphins (how close he/she can get) would be a major or minor factor ($p \leq 0.01$).
INFORMATION: Has not heard or read something that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild ($p < 0.05$).

See page 14, “Interpreting the Nonparametric Analysis Results,” for an explanation of how to read the nonparametric analysis tabulations.

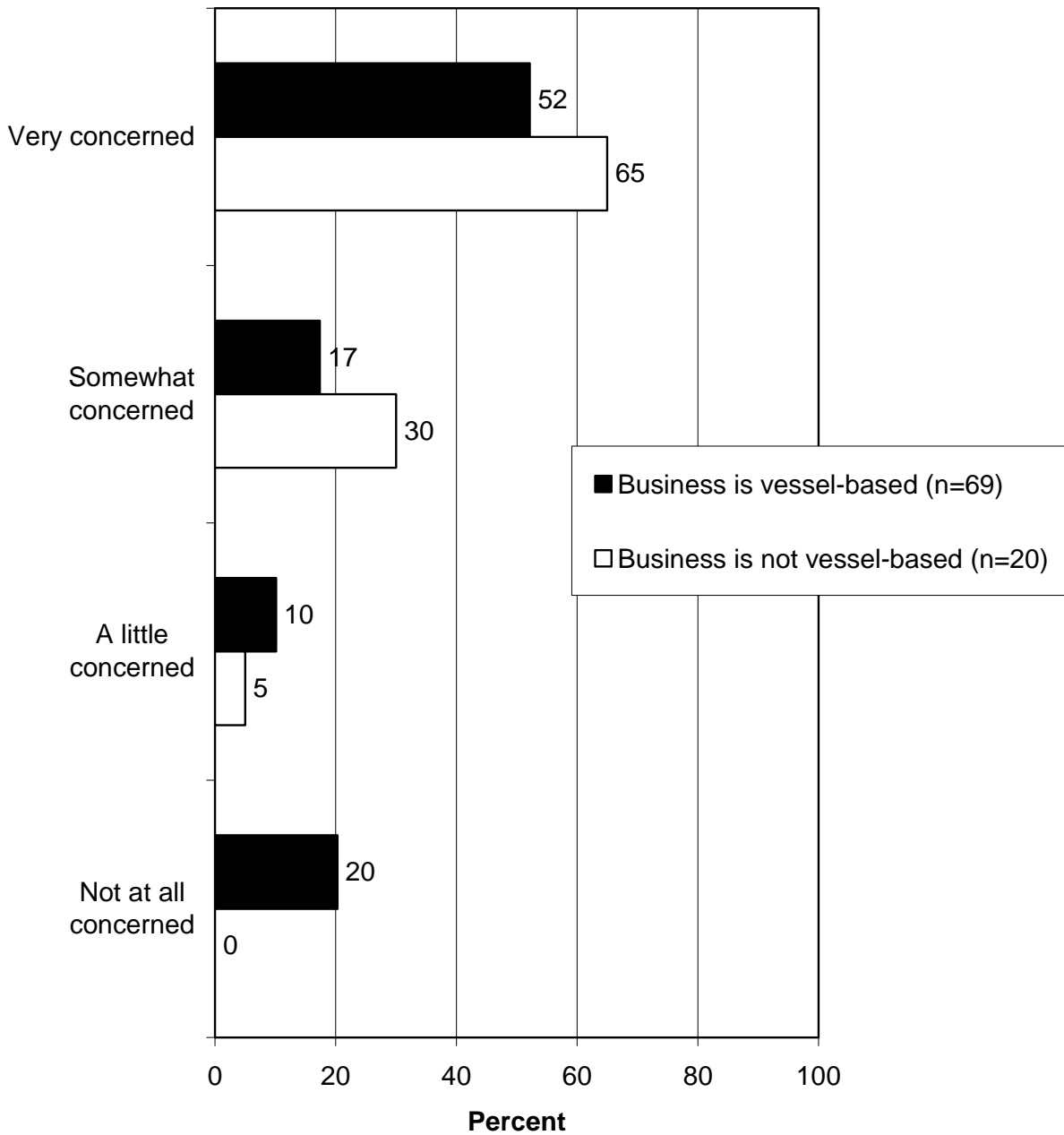
**Q1. How much would you say you are concerned about protecting wild dolphins?
(Business survey)**



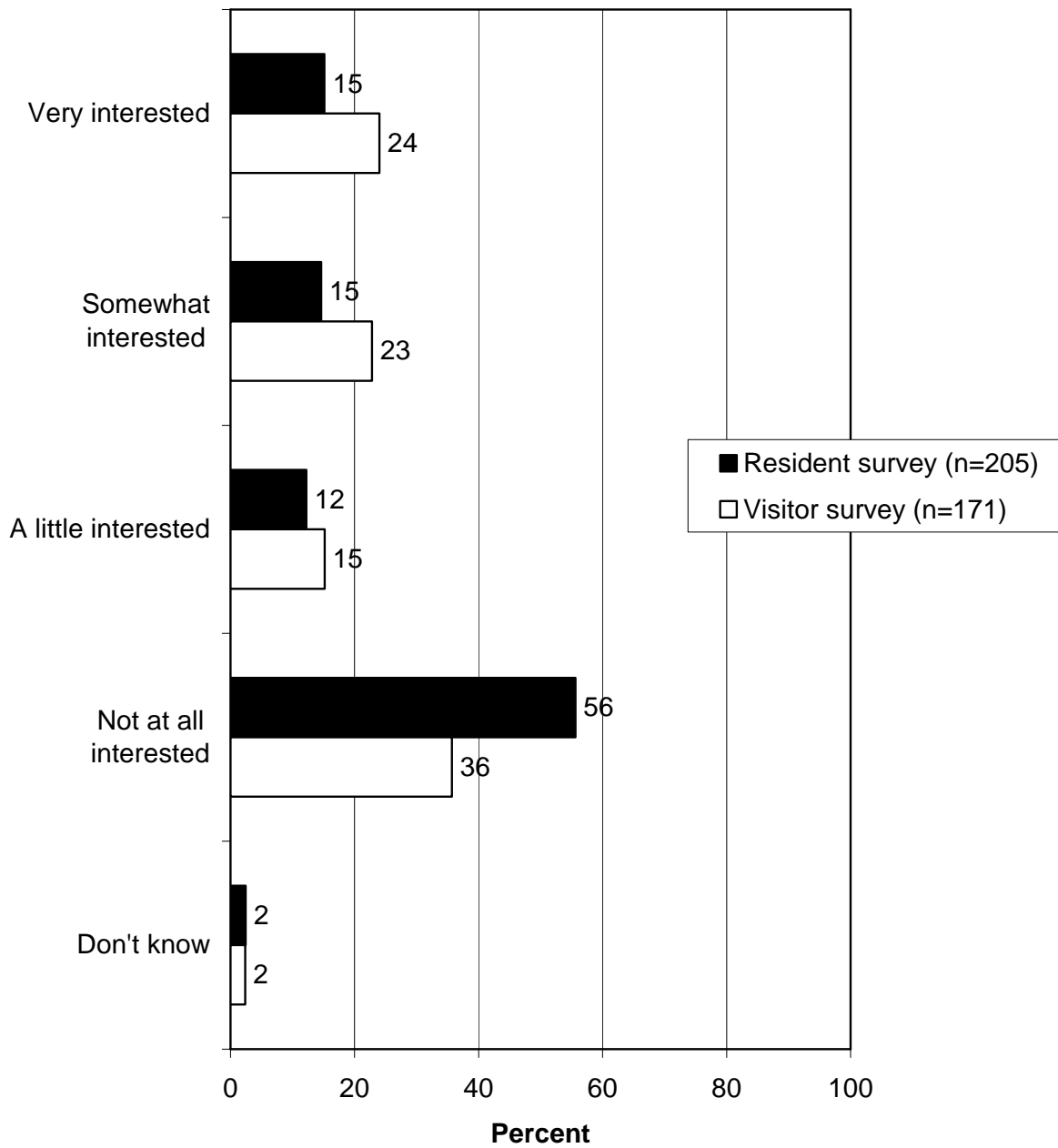
**Q1. How much would you say you are concerned about protecting wild dolphins?
(Business survey)**



**Q1. How much would you say you are concerned about protecting wild dolphins?
(Business survey)**



Q8/Q10. How interested would you say you are in feeding dolphins in the wild?



Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—INTEREST: Is very interested in feeding dolphins in the wild
INTEREST: Is very interested in closely interacting with dolphins in the wild ($p \leq 0.001$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major factor ($p \leq 0.05$).

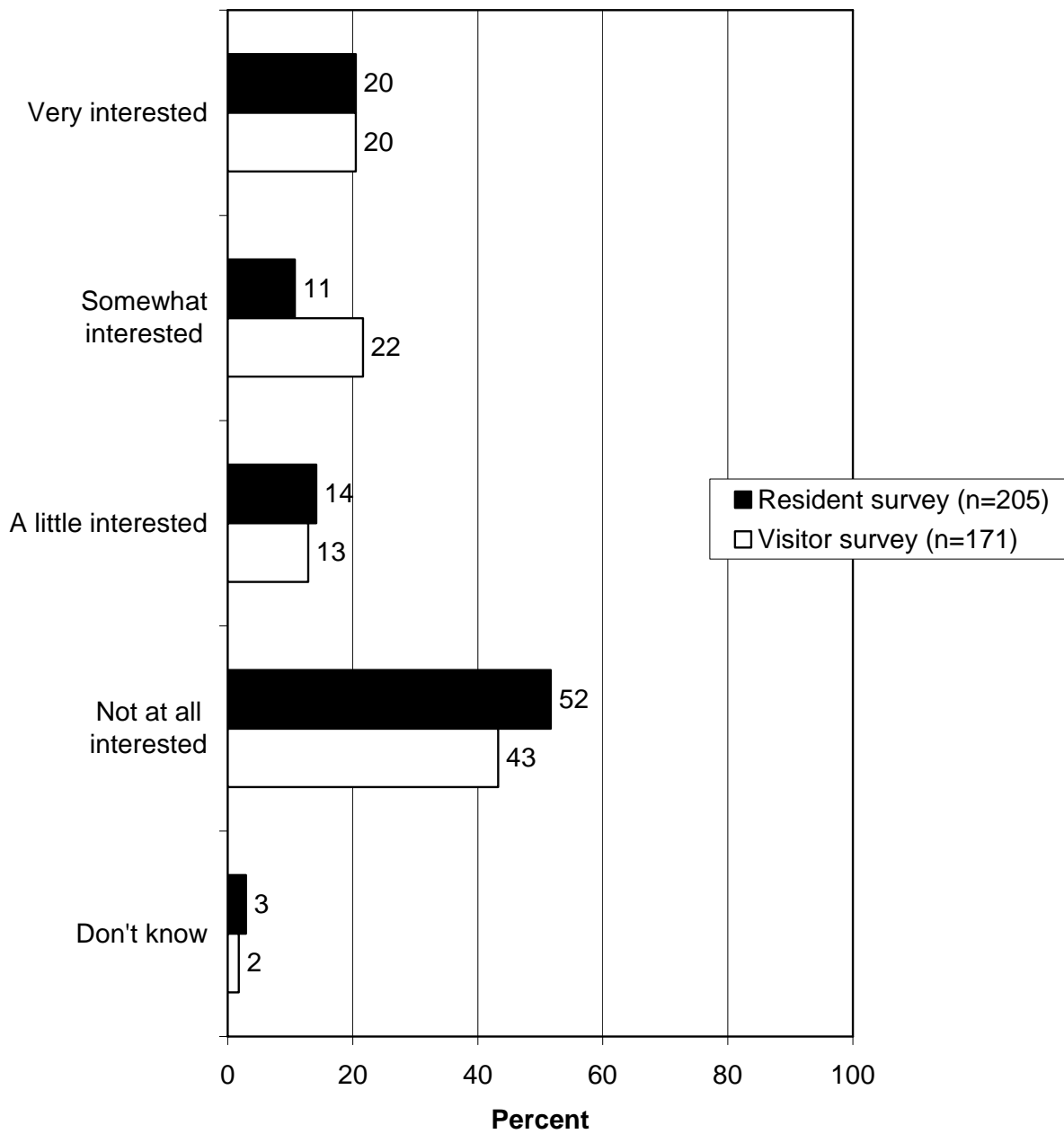
See page 14, “Interpreting the Nonparametric Analysis Results,” for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

VISITOR SURVEY—INTEREST: Is very interested in feeding dolphins in the wild
PARTICIPATION: Has viewed dolphins on own in the Panama City area in the past 2 years (not as part of a paid wild dolphin viewing tour) ($p \leq 0.05$).
INTEREST: Is very interested in closely interacting with dolphins in the wild ($p \leq 0.001$).
ATTITUDE: Is very concerned about protecting wild dolphins ($p \leq 0.001$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major factor ($p \leq 0.05$).
INFORMATION: Has heard or read something that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild ($p \leq 0.05$).
DEMOGRAPHIC: Is younger than 55 years old ($p \leq 0.05$).

See page 14, “Interpreting the Nonparametric Analysis Results,” for an explanation of how to read the nonparametric analysis tabulations.

Q9/Q11. How interested would you say you are in closely interacting with dolphins in the wild, such as swimming with, touching, or petting them?



Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—INTEREST: Is very interested in closely interacting with dolphins in the wild
PARTICIPATION: Has viewed dolphins on own in the Panama City area in the past 2 years (not as part of a paid wild dolphin viewing tour) ($p \leq 0.01$).
PARTICIPATION: Has not participated in at least one of the water-based activities listed in the survey in the Panama City area in the past 2 years ($p \leq 0.01$).
INTEREST: Is very interested in feeding dolphins in the wild ($p \leq 0.001$).
ATTITUDE: Is very concerned about protecting wild dolphins ($p \leq 0.01$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major or minor factor ($p \leq 0.05$).
DEMOGRAPHIC: Is younger than 55 years old ($p \leq 0.001$).
DEMOGRAPHIC: Is younger than 65 years old ($p \leq 0.01$).

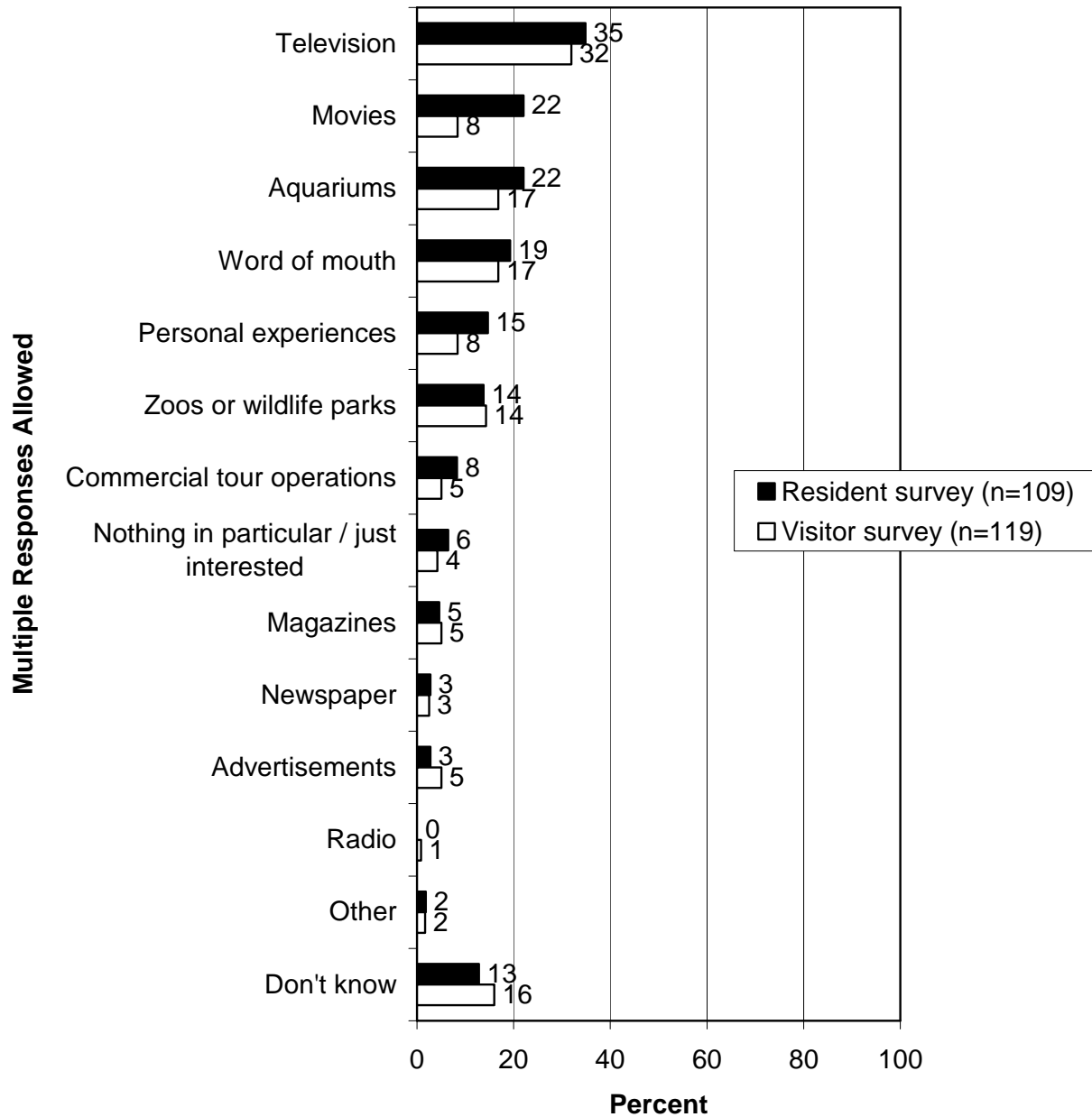
See page 14, “Interpreting the Nonparametric Analysis Results,” for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

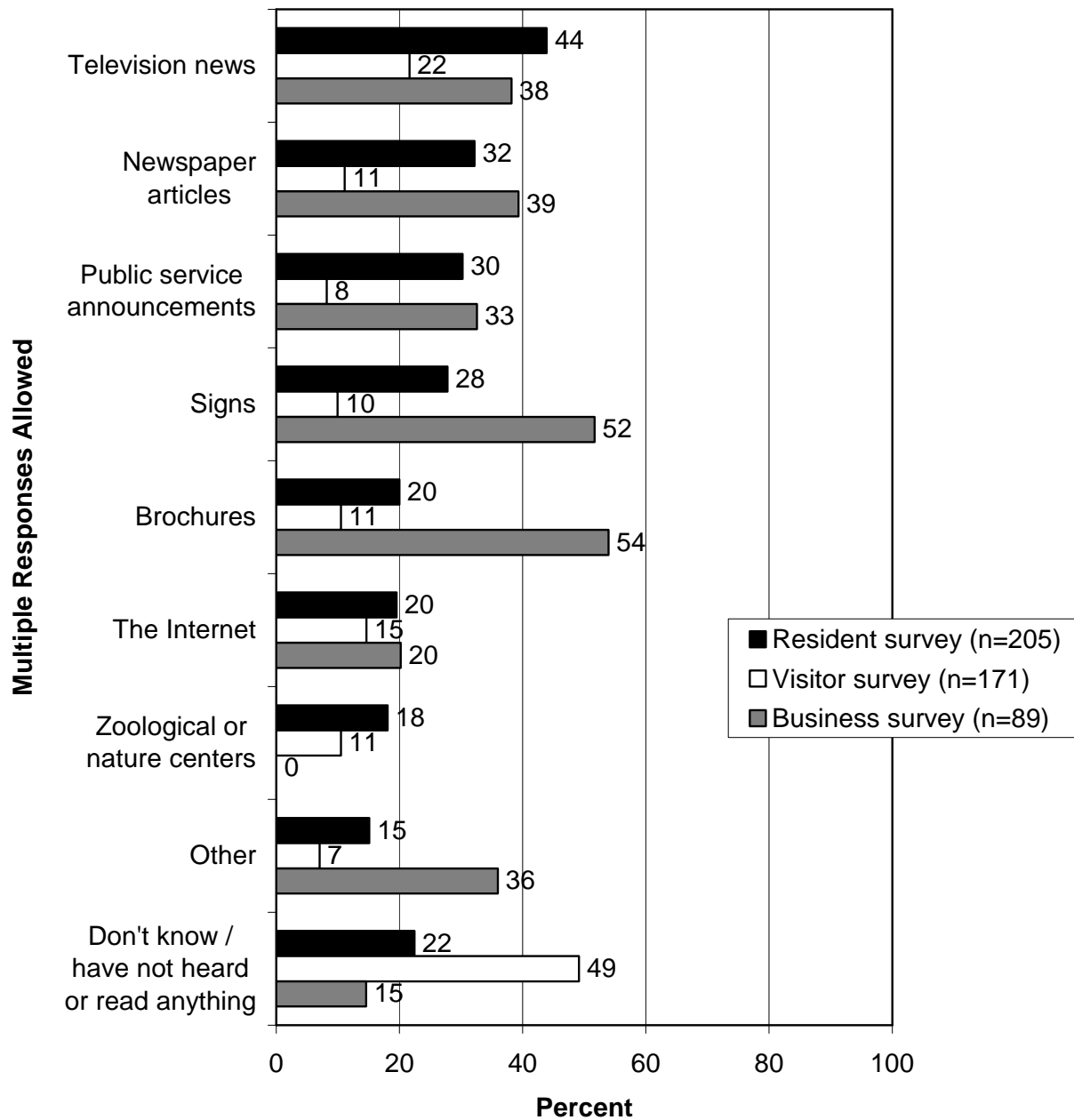
VISITOR SURVEY—INTEREST: Is very interested in closely interacting with dolphins in the wild
PARTICIPATION: Has viewed dolphins on own in the Panama City area in the past 2 years (not as part of a paid wild dolphin viewing tour) ($p \leq 0.001$).
INTEREST: Is very interested in feeding dolphins in the wild ($p \leq 0.001$).
ATTITUDE: Is very concerned about protecting wild dolphins ($p \leq 0.01$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major or minor factor ($p \leq 0.05$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major factor ($p \leq 0.05$).
DEMOGRAPHIC: Is younger than 55 years old ($p \leq 0.01$).
DEMOGRAPHIC: Is younger than 65 years old ($p \leq 0.01$).

See page 14, “Interpreting the Nonparametric Analysis Results,” for an explanation of how to read the nonparametric analysis tabulations.

Q12/Q14. What do you think created this interest or desire? (Asked of those who are interested in feeding and/or closely interacting with dolphins in the wild.)



Q18/Q29/Q3-9. For each source, please indicate if you heard or read about feeding dolphins from it.

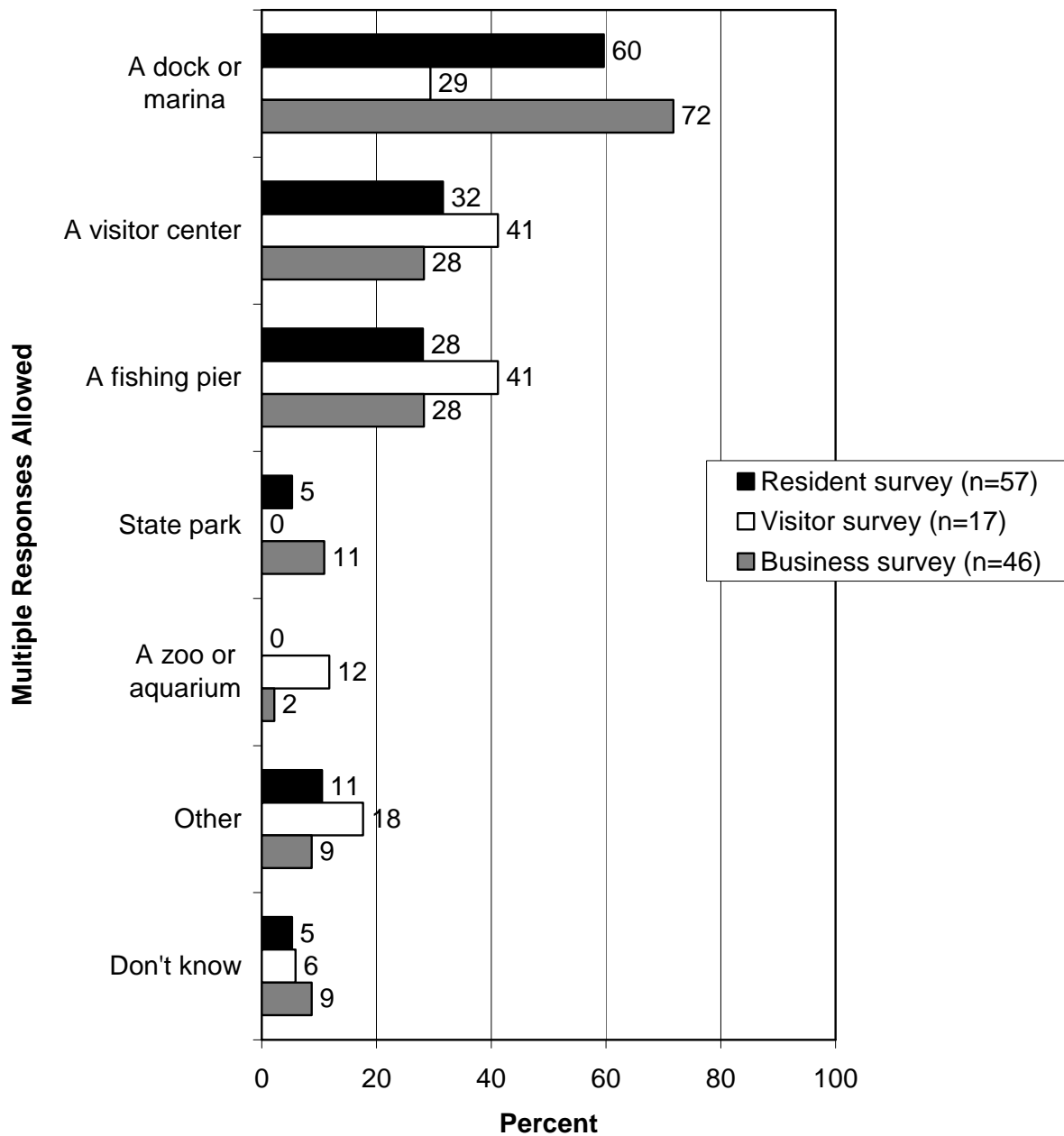


Correlations to the Characteristic or Opinion Shown in the Top Row

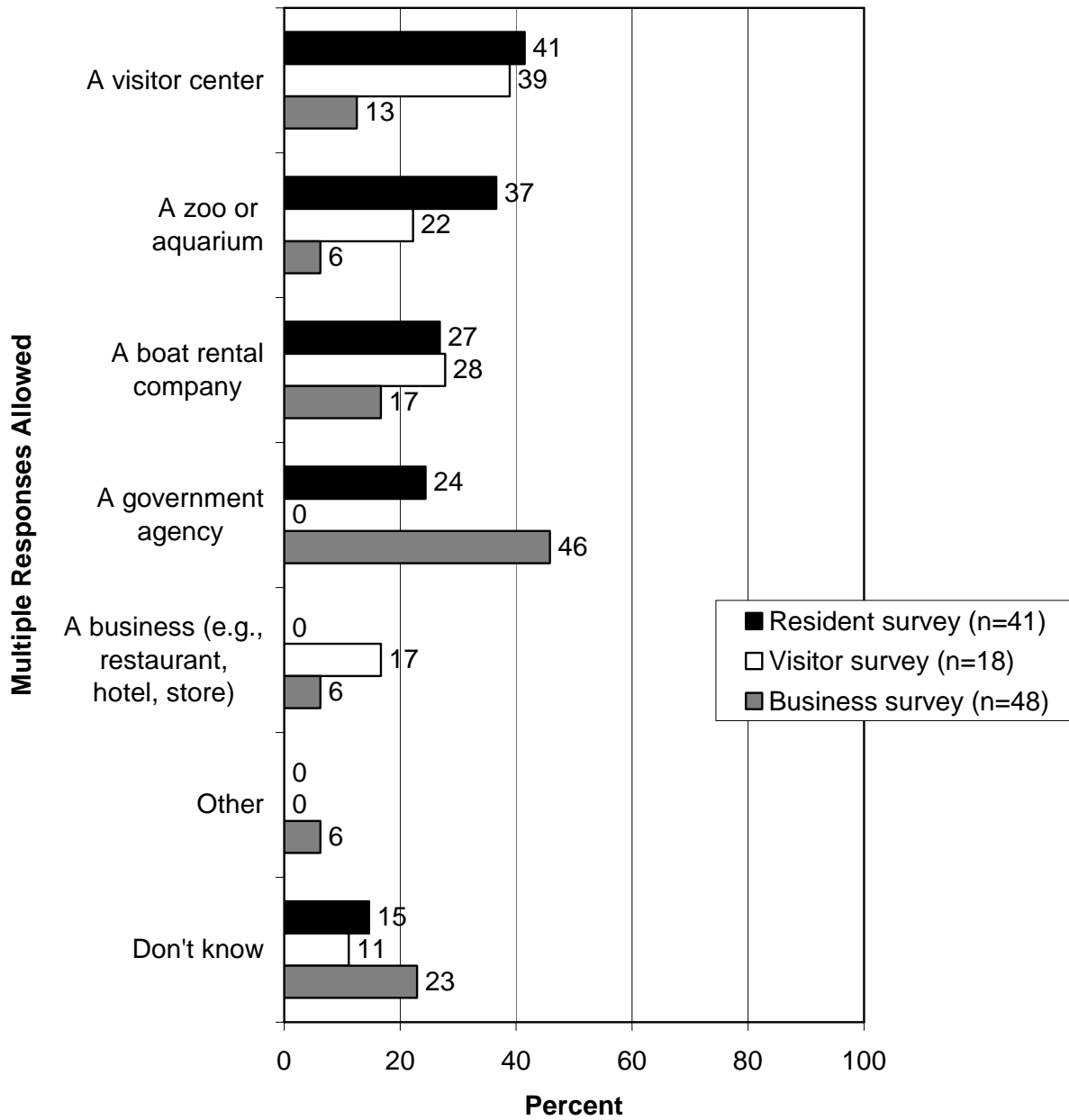
RESIDENT SURVEY—INFORMATION: Got information about feeding dolphins from a public service announcement
PARTICIPATION: Has not participated in at least one of the water-based activities listed in the survey in the Panama City area in the past 2 years ($p \leq 0.05$).
PARTICIPATION: Has viewed dolphins on own in the Panama City area in the past 2 years (not as part of a paid wild dolphin viewing tour) ($p \leq 0.05$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major or minor factor ($p \leq 0.001$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major factor ($p \leq 0.001$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major or minor factor ($p \leq 0.01$).
KNOWLEDGE: Indicated that feeding dolphins in the wild is harmful (but may or may not have correctly indicated that it is also illegal) ($p \leq 0.001$).
KNOWLEDGE: Indicated that feeding dolphins in the wild is illegal and harmful ($p \leq 0.001$).
KNOWLEDGE: Indicated that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is harmful (but may or may not have correctly indicated that it is also illegal) ($p \leq 0.01$).
KNOWLEDGE: Indicated that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is illegal and harmful ($p \leq 0.01$).
INFORMATION: Got information about swimming with, touching, or petting dolphins from a public service announcement ($p \leq 0.001$).
DEMOGRAPHIC: Indicated being employed ($p \leq 0.001$).
DEMOGRAPHIC: Is younger than 65 years old ($p \leq 0.05$).

See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

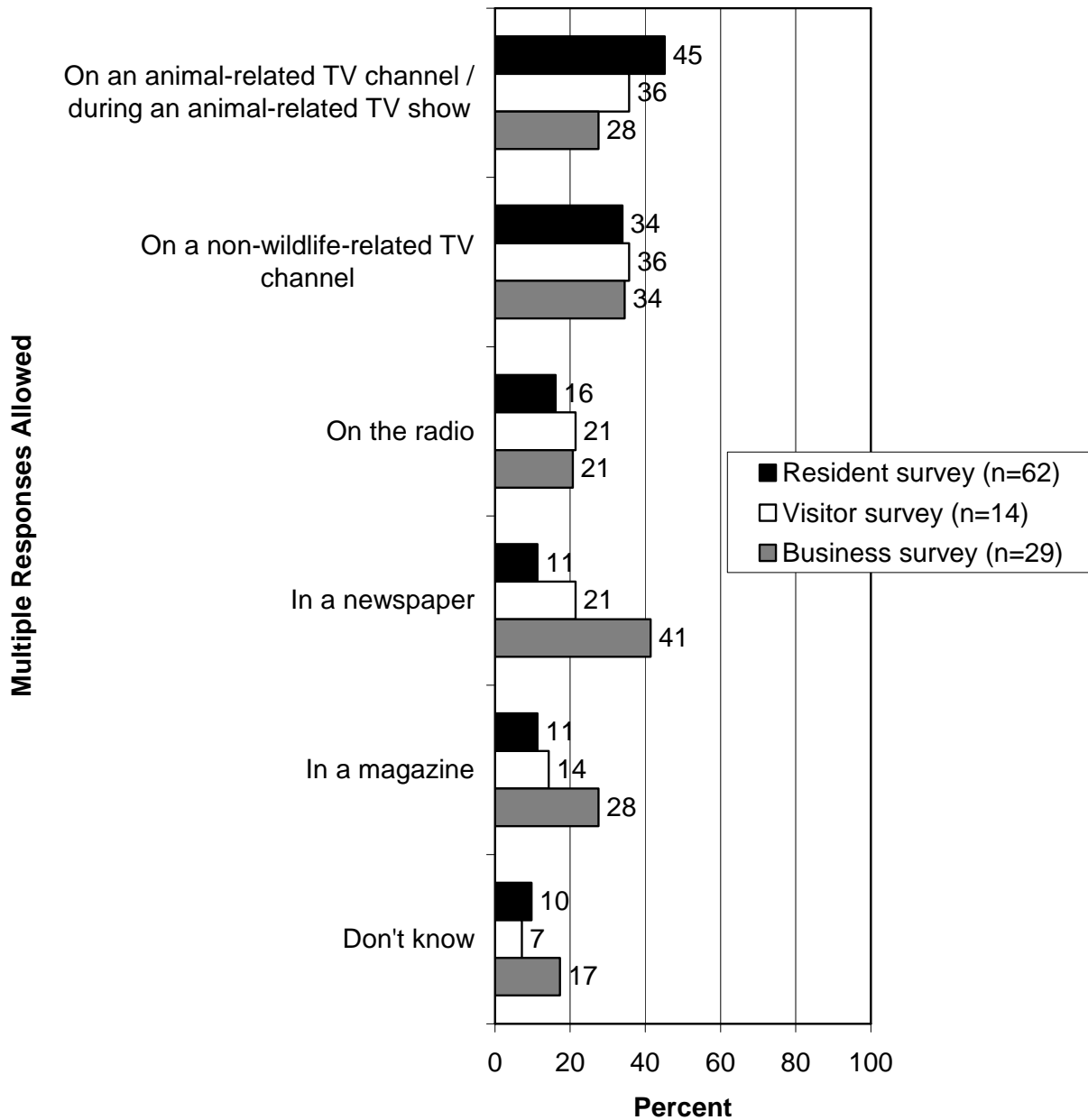
Q21/Q23/Q3. Where did you read signs about feeding dolphins? (Asked of those who have read about feeding dolphins from signs.)



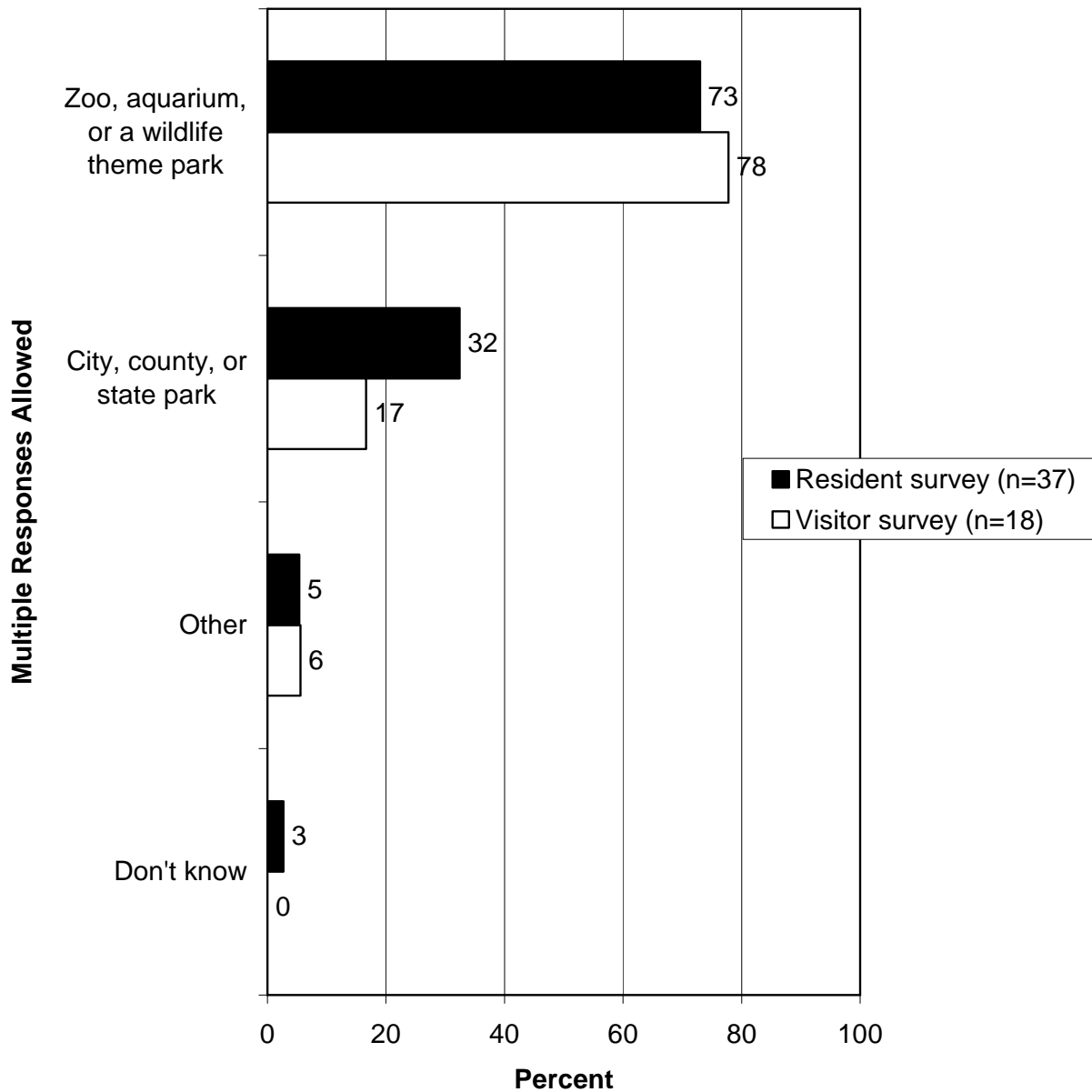
Q25/Q27/Q4. Where did the brochure you read about feeding dolphins come from? (Asked of those who have read about feeding dolphins in a brochure.)



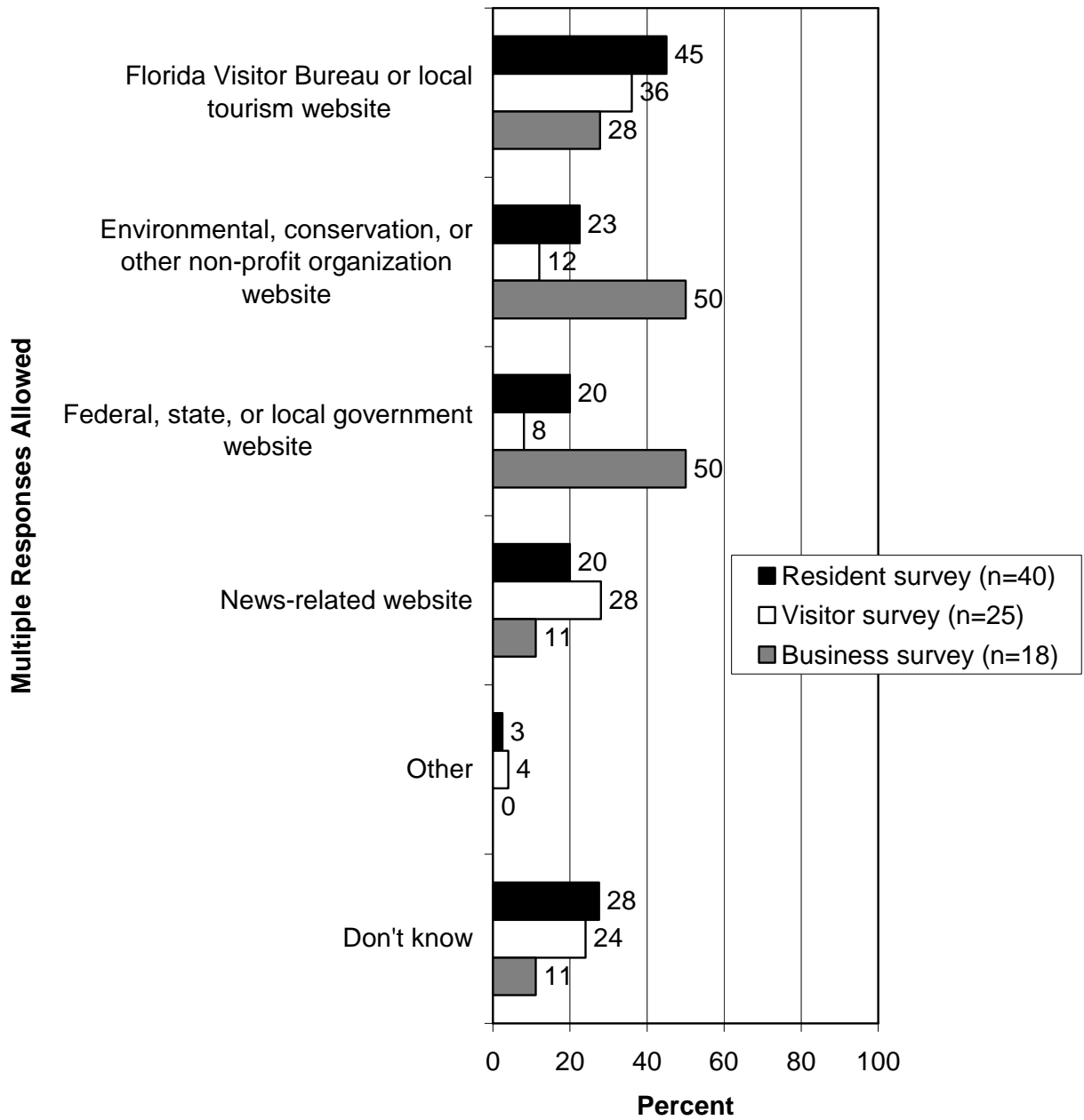
**Q29/Q31/Q5. Where did you hear or see a public service announcement about feeding dolphins?
(Asked of those who have heard or read about feeding dolphins from a public service announcement.)**



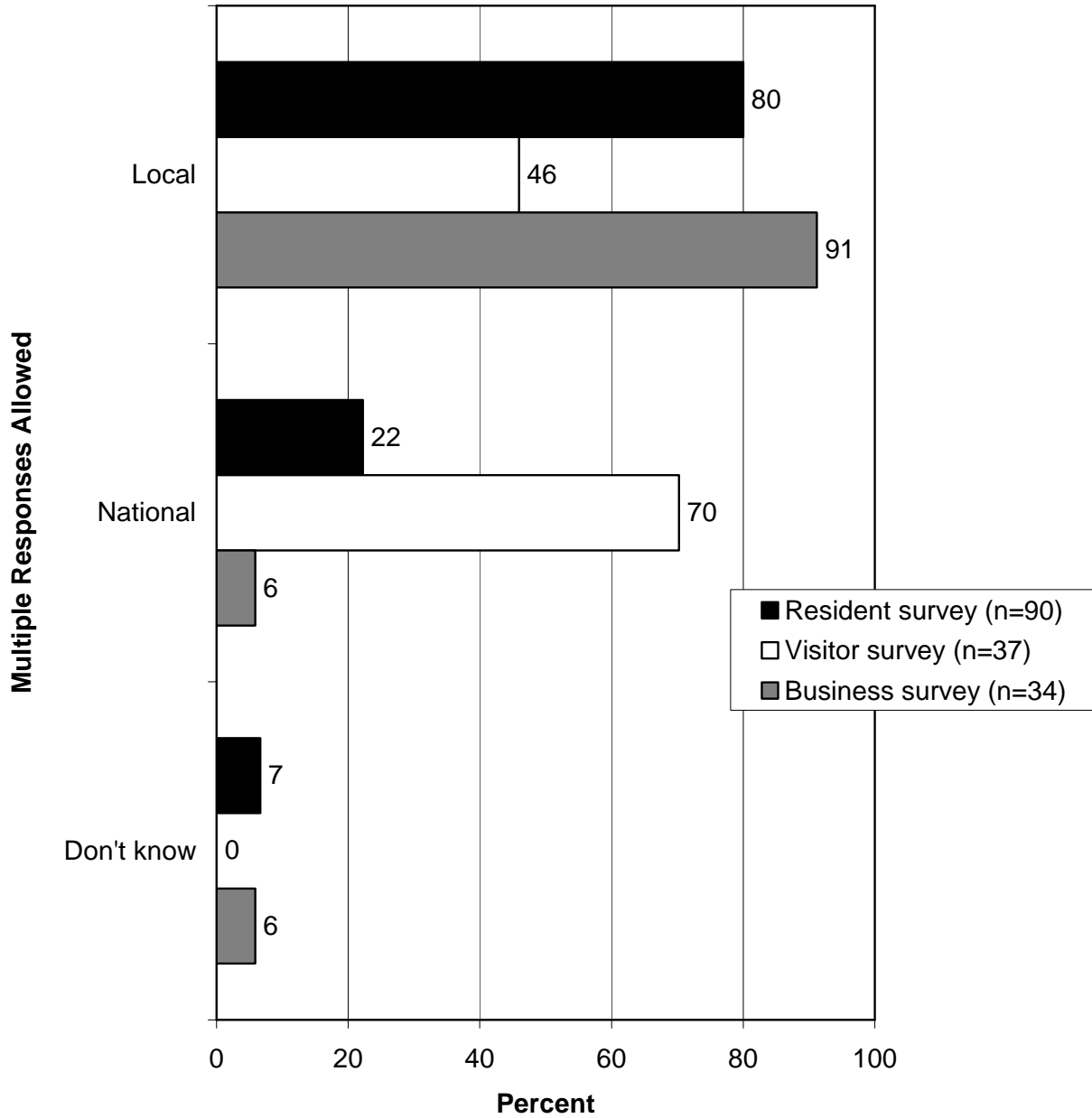
Q32/Q34. At what type of zoological or nature center did you hear or read about feeding dolphins? (Asked of those who have heard or read about feeding dolphins at a zoological or nature center.)



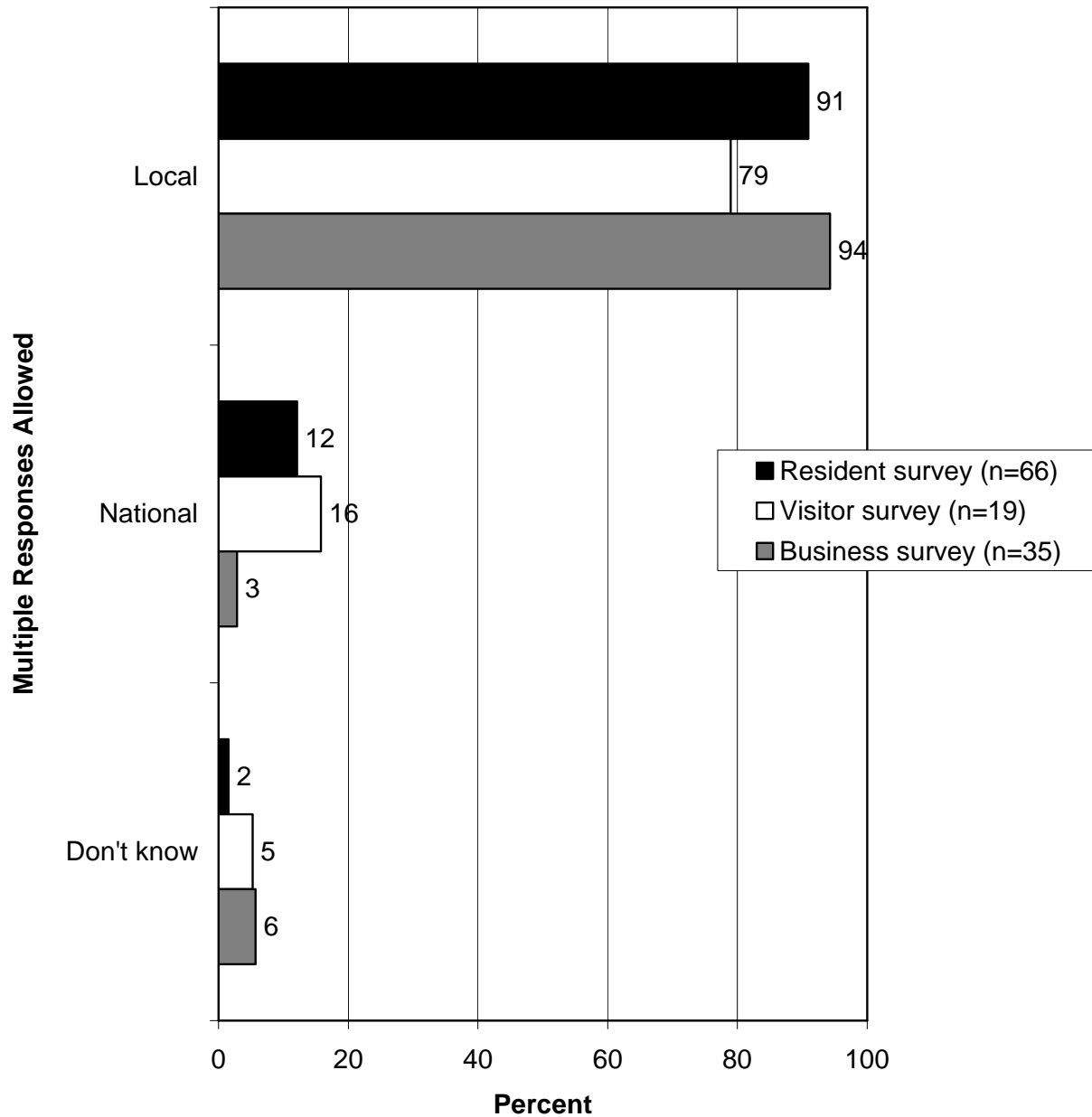
Q36/Q38/Q6. Where on the Internet did you read about feeding dolphins? (Asked of those who have read about feeding dolphins on the Internet.)



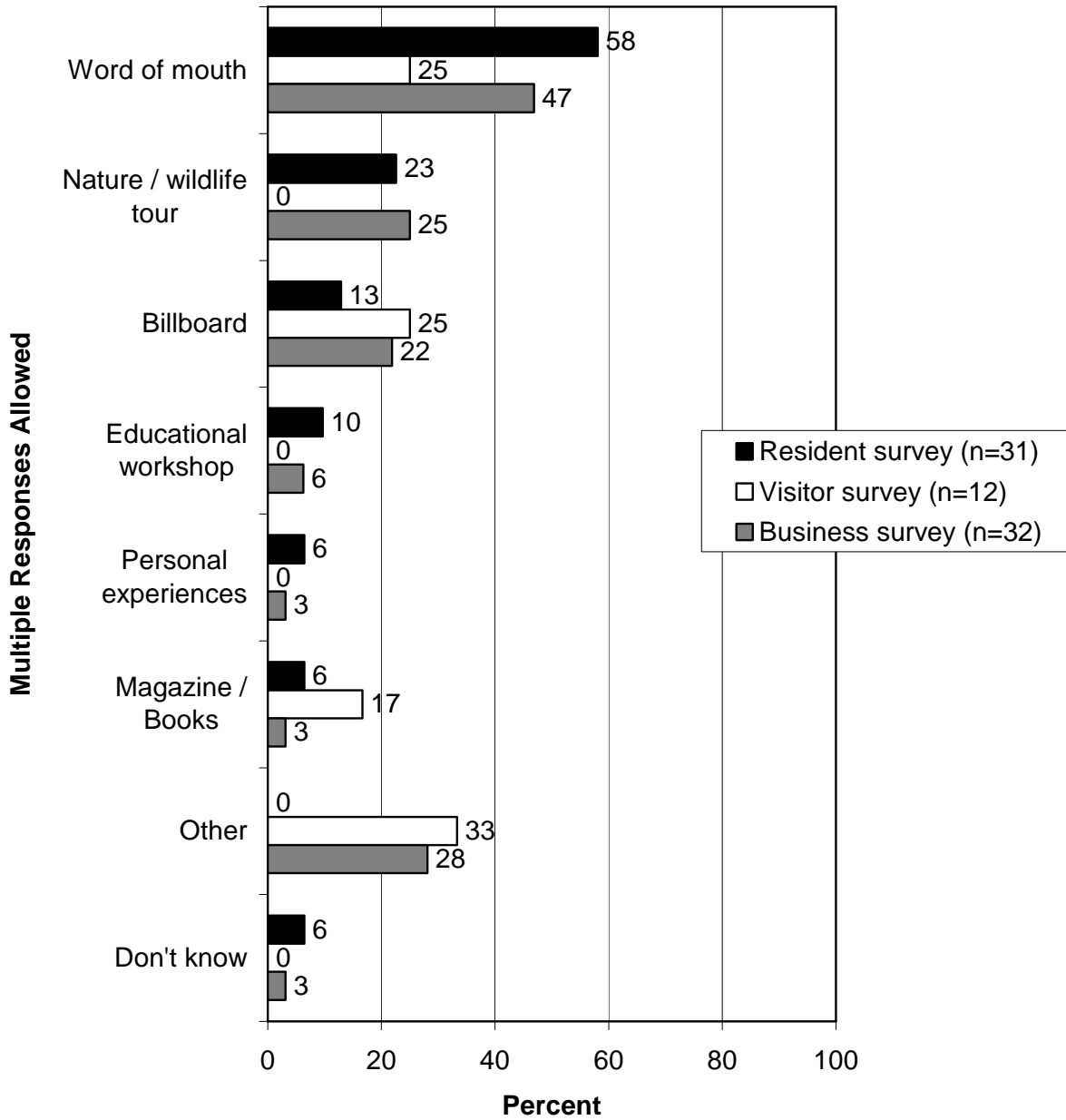
Q40/Q42/Q7. From what type of television news did you hear about feeding dolphins? (Asked of those who have heard about feeding dolphins from television news.)



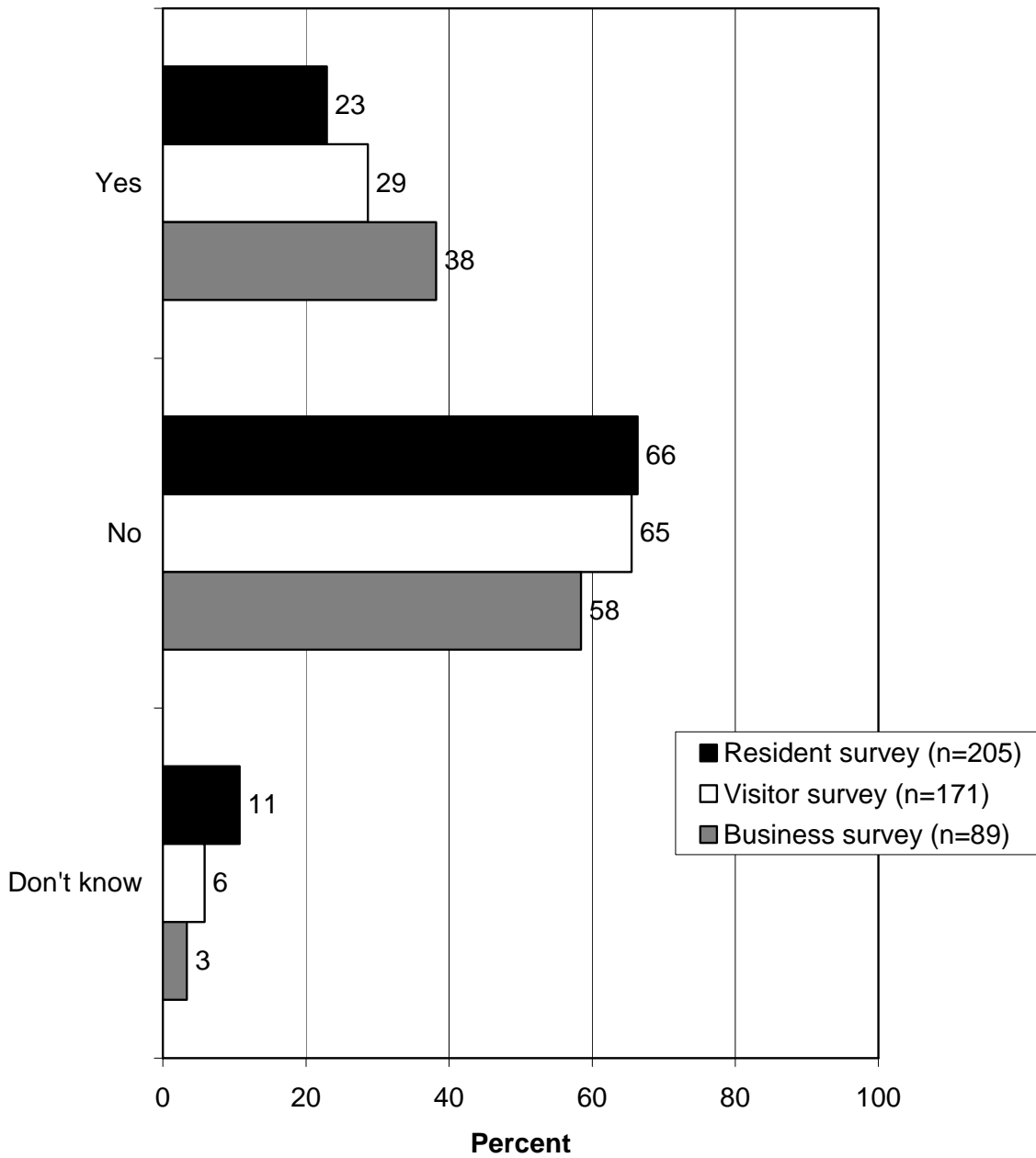
Q43/Q45/Q8. In what type of newspaper did you read about feeding dolphins? (Asked of those who have read about feeding dolphins in a newspaper.)



Q47/Q49/Q9. Where else did you hear about feeding dolphins? (Asked of those who have heard or read about feeding dolphins from a source other than the ones listed.)



Q49/Q51/Q10. Have you heard or read anything that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild?



Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—INFORMATION: Has heard or read something that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild
PARTICIPATION: Does not own a boat or jet ski ($p \leq 0.05$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says cost would be a major or minor factor ($p \leq 0.05$).

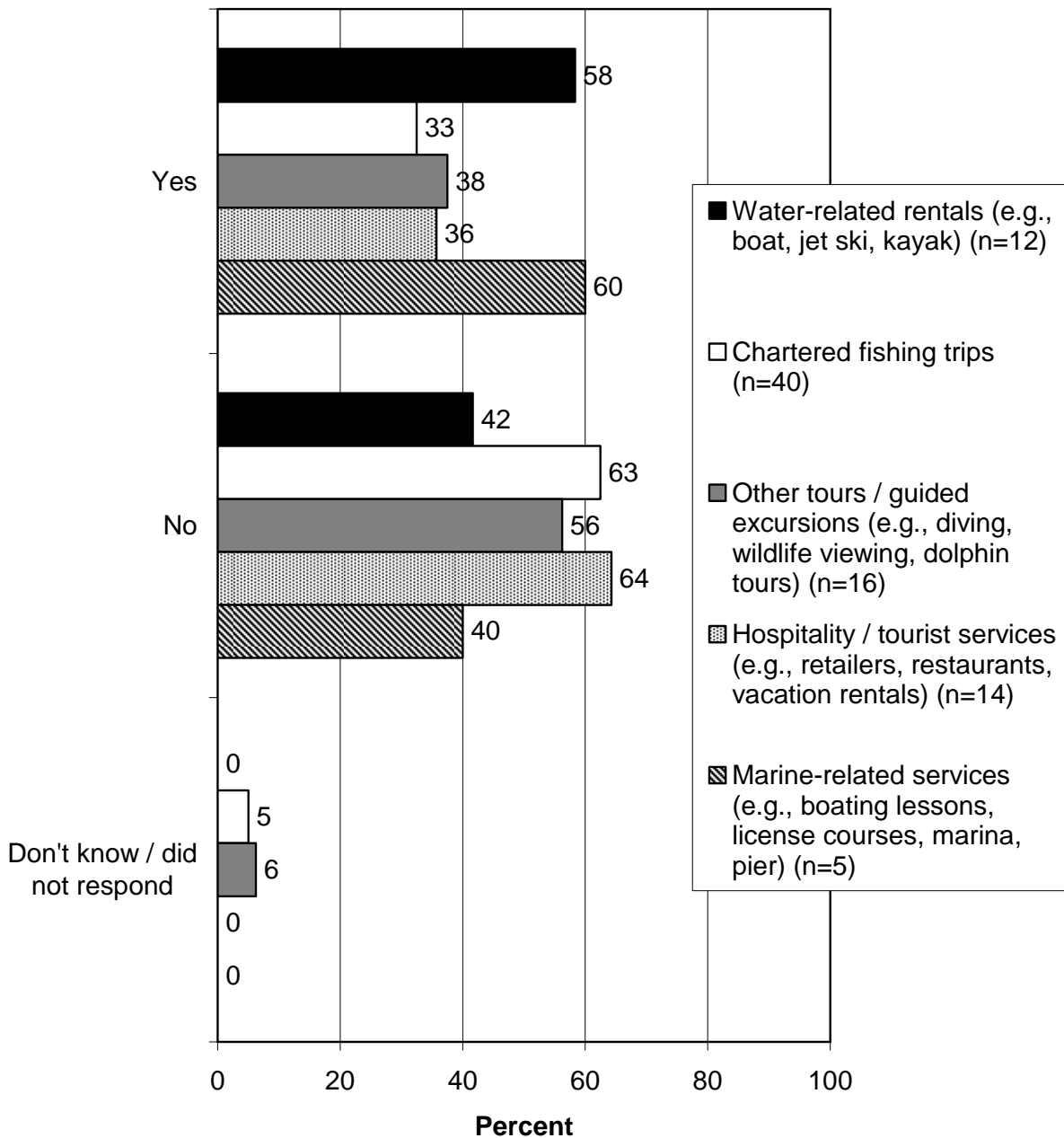
See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

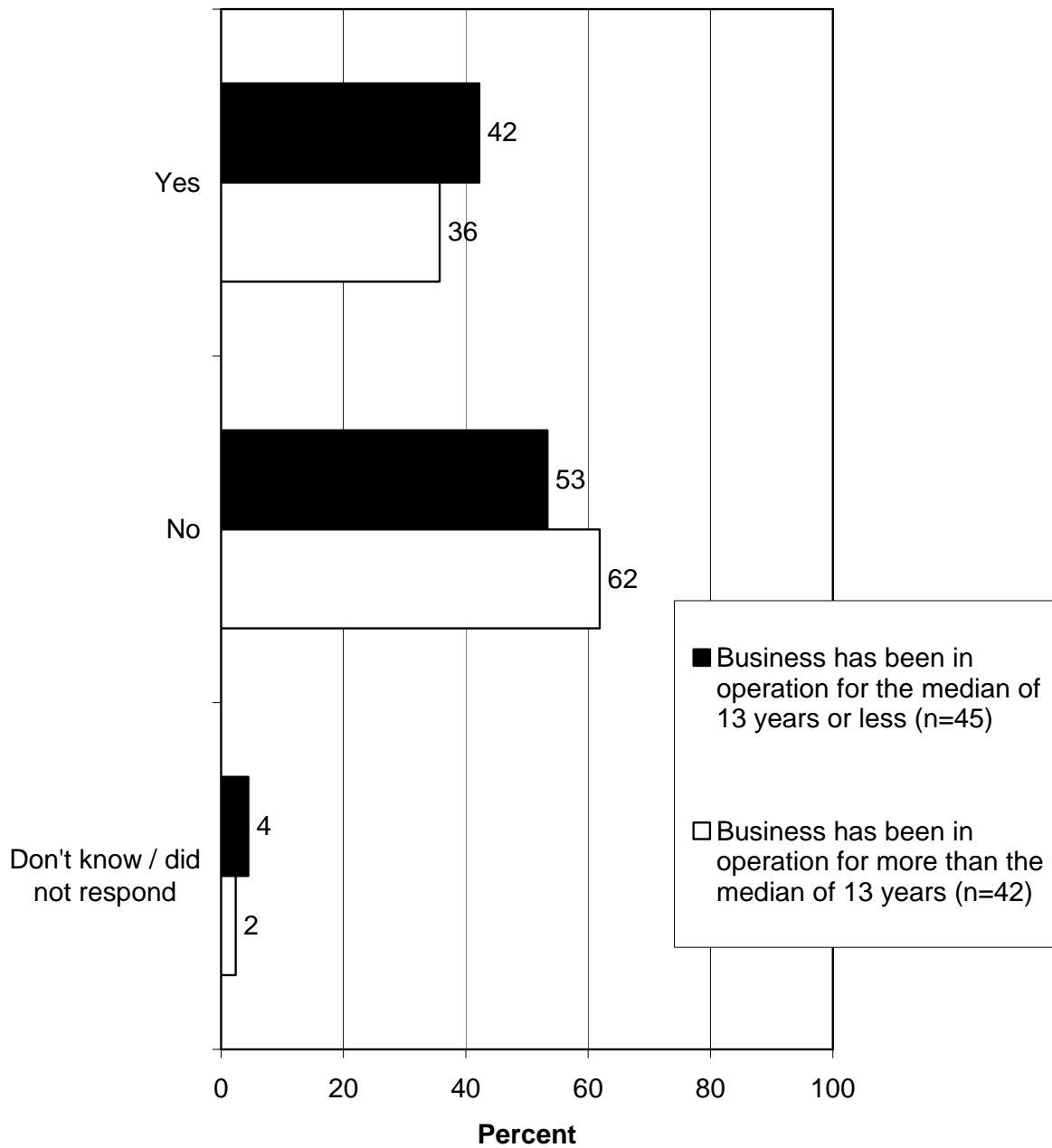
VISITOR SURVEY—INFORMATION: Has heard or read something that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild
PARTICIPATION: Has participated in wild dolphin-related activities other than in the Panama City area in the past 2 years ($p < 0.05$).
PARTICIPATION: Has not viewed dolphins as part of a paid wild dolphin viewing tour in the Panama City area in the past 2 years ($p \leq 0.05$).
INTEREST: Is very interested in feeding dolphins in the wild ($p \leq 0.05$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major factor ($p \leq 0.05$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major or minor factor ($p \leq 0.05$).
KNOWLEDGE: Did not indicate that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is illegal and harmful ($p \leq 0.05$).

See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

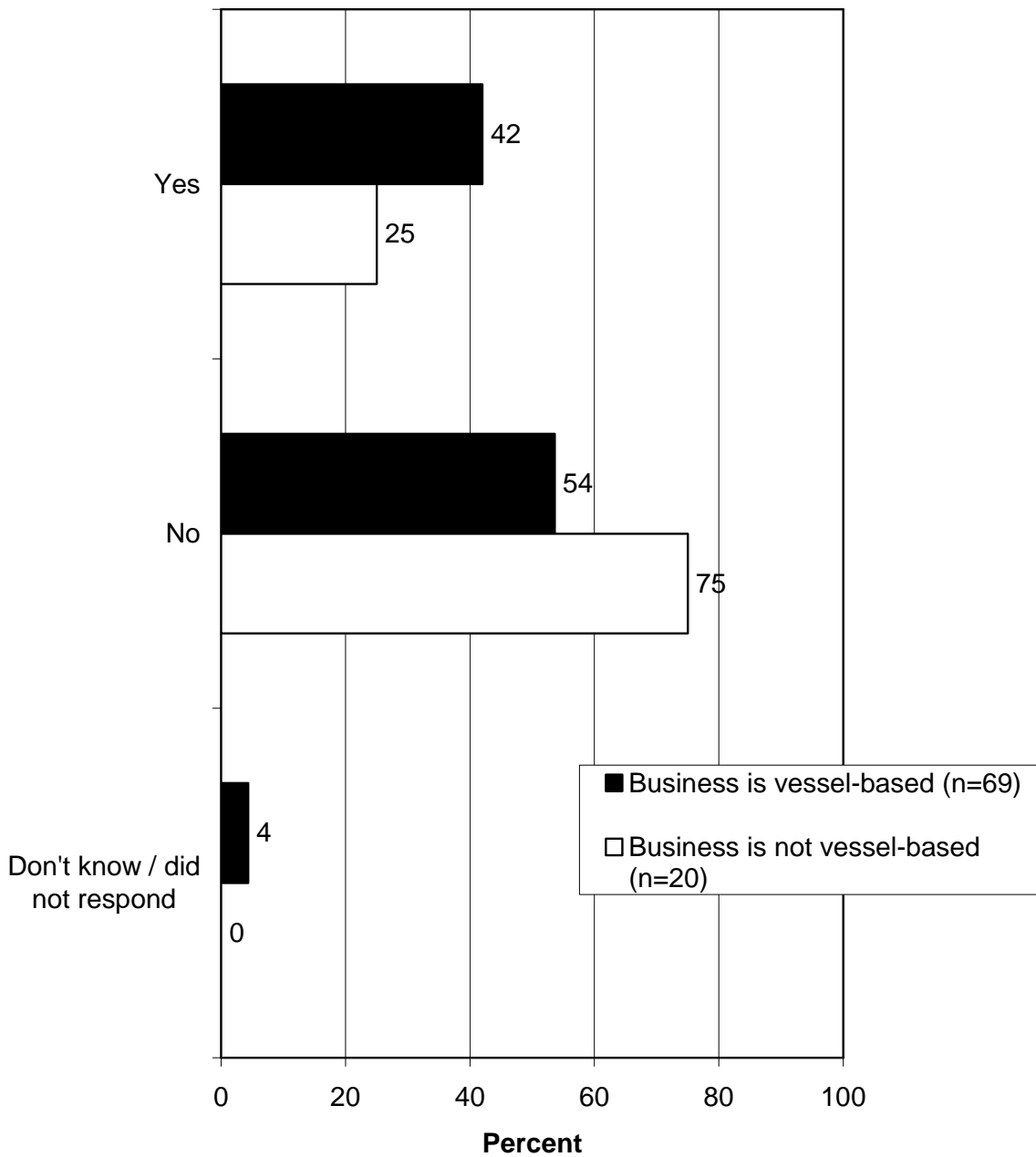
**Q10. Have you heard or read anything that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild?
(Business survey)**



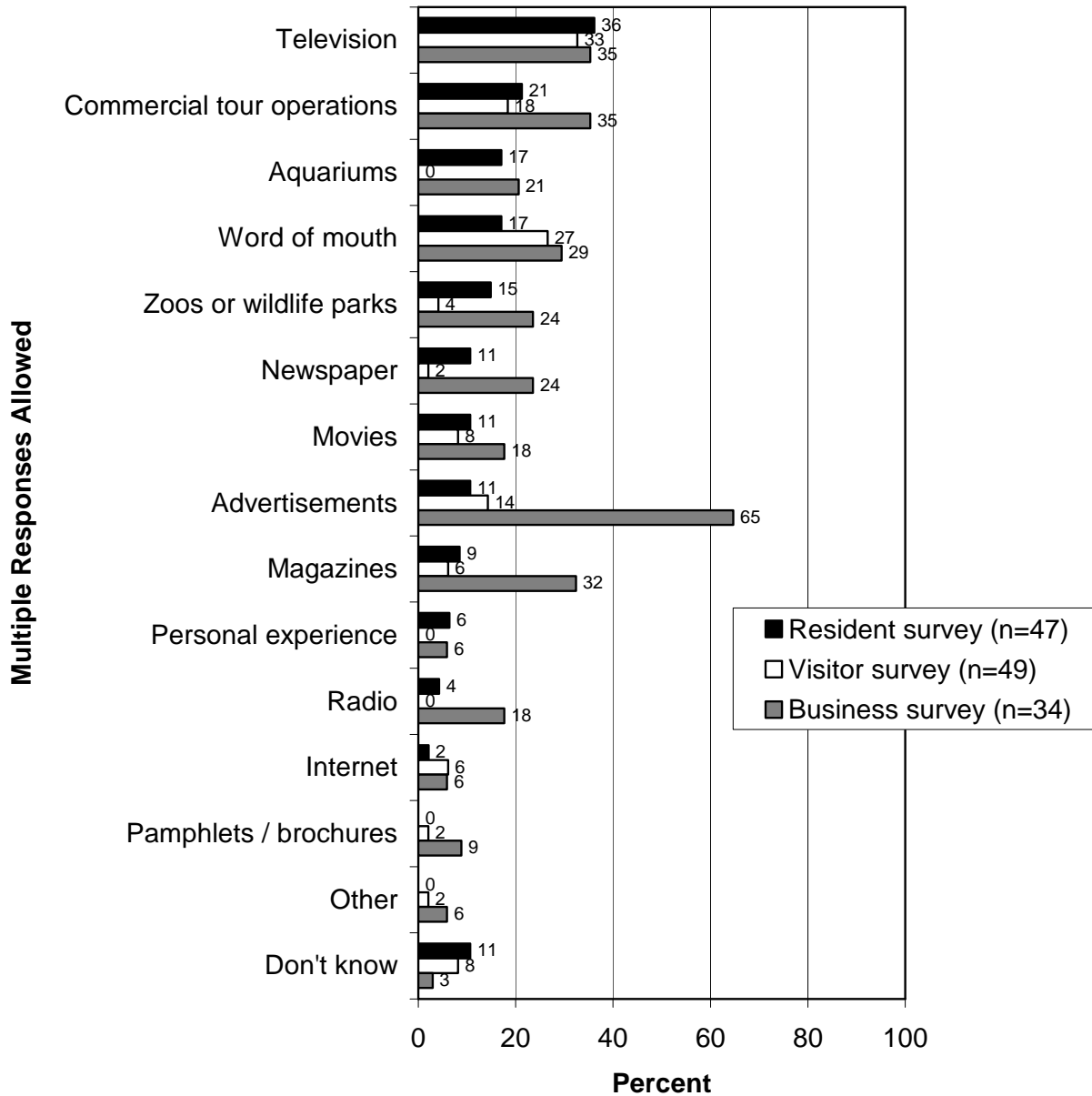
**Q10. Have you heard or read anything that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild?
(Business survey)**



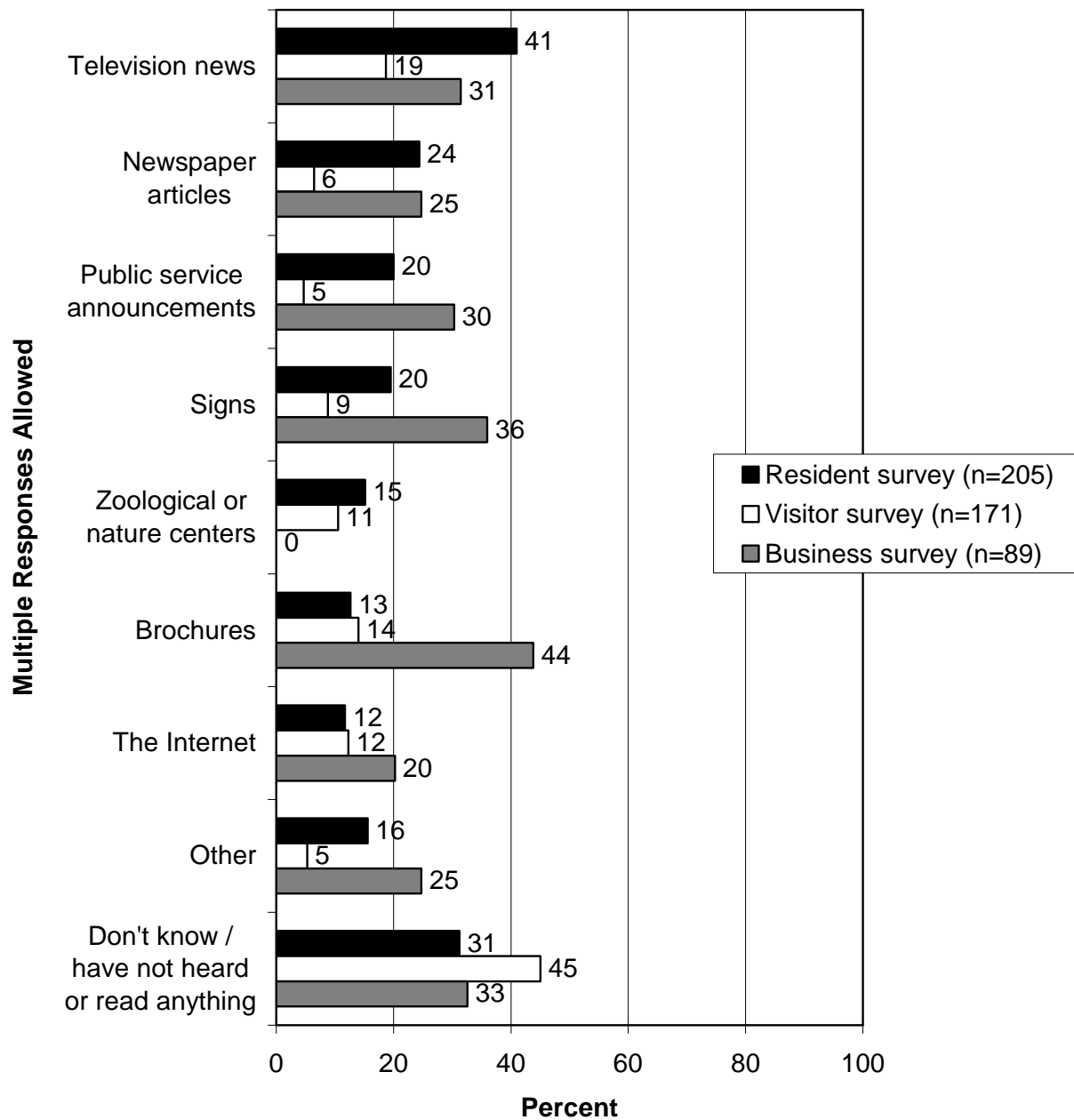
**Q10. Have you heard or read anything that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild?
(Business survey)**



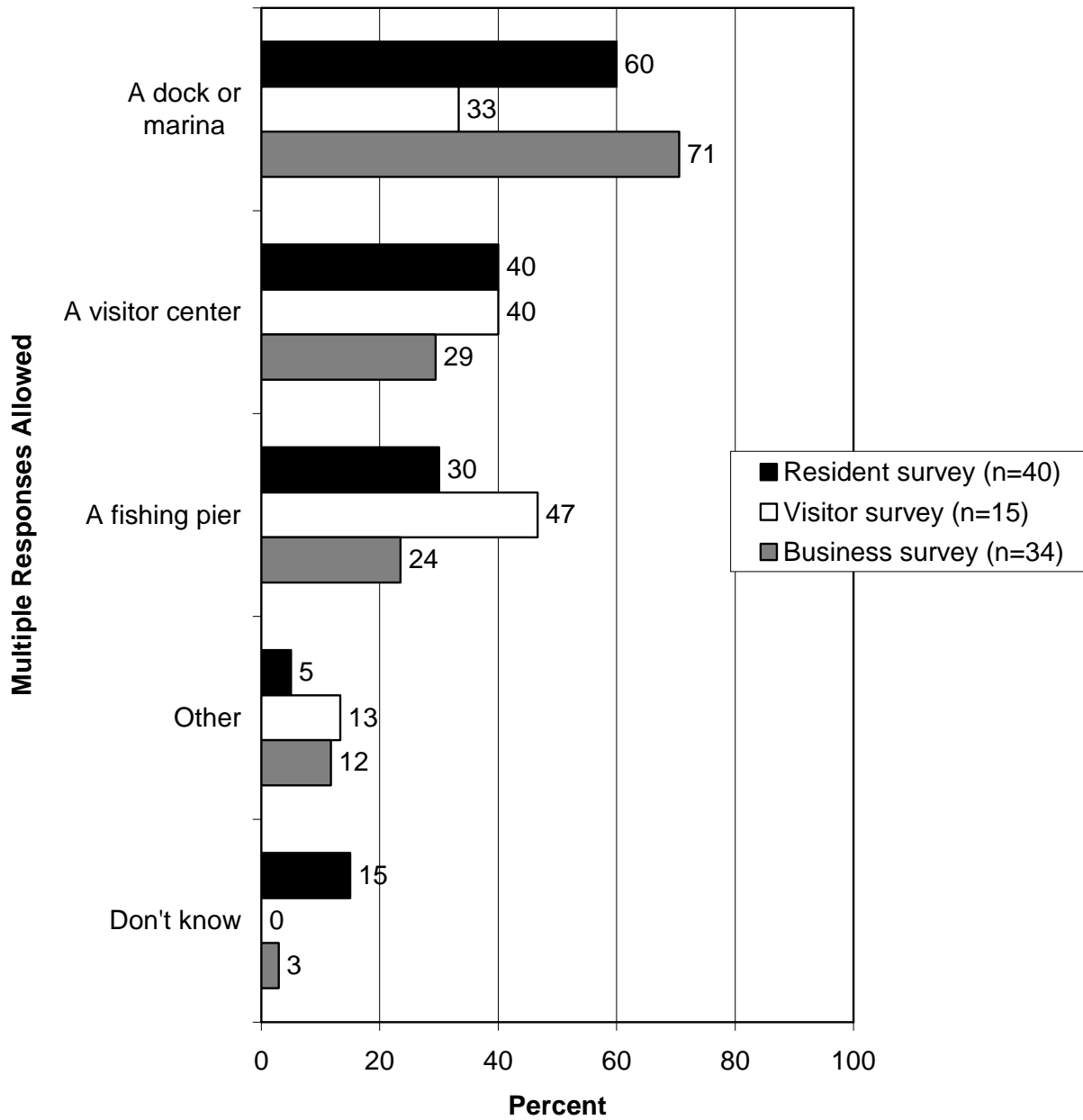
Q52/Q54/Q11. Please indicate where you heard or read the information that made it seem that it is all right to swim with, touch, or pet dolphins in the wild. (Asked of those who heard or read anything that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild.)



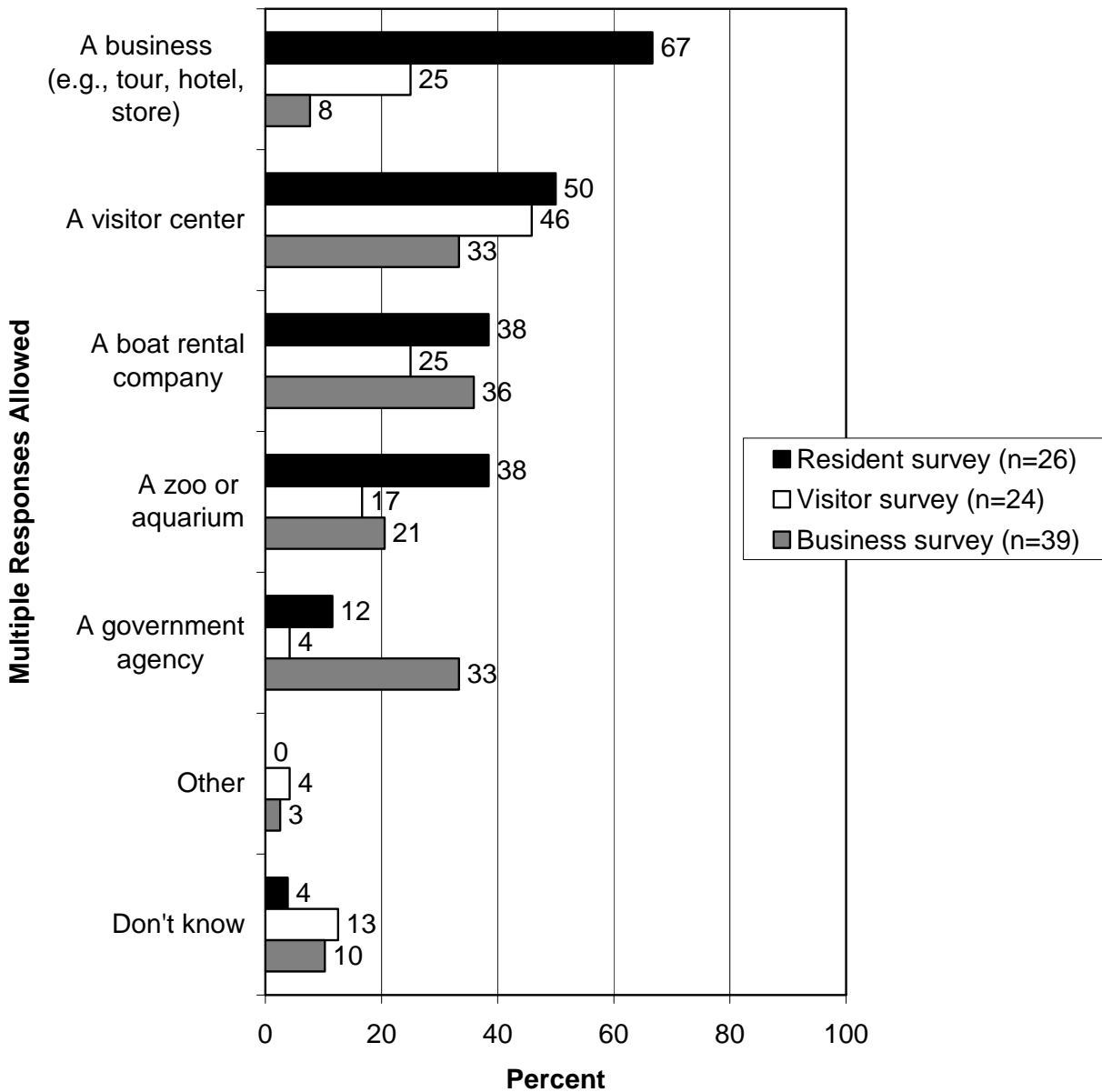
Q57/Q59/Q13-19. For each source, please indicate if you heard or read about swimming with, touching, or petting dolphins from it.



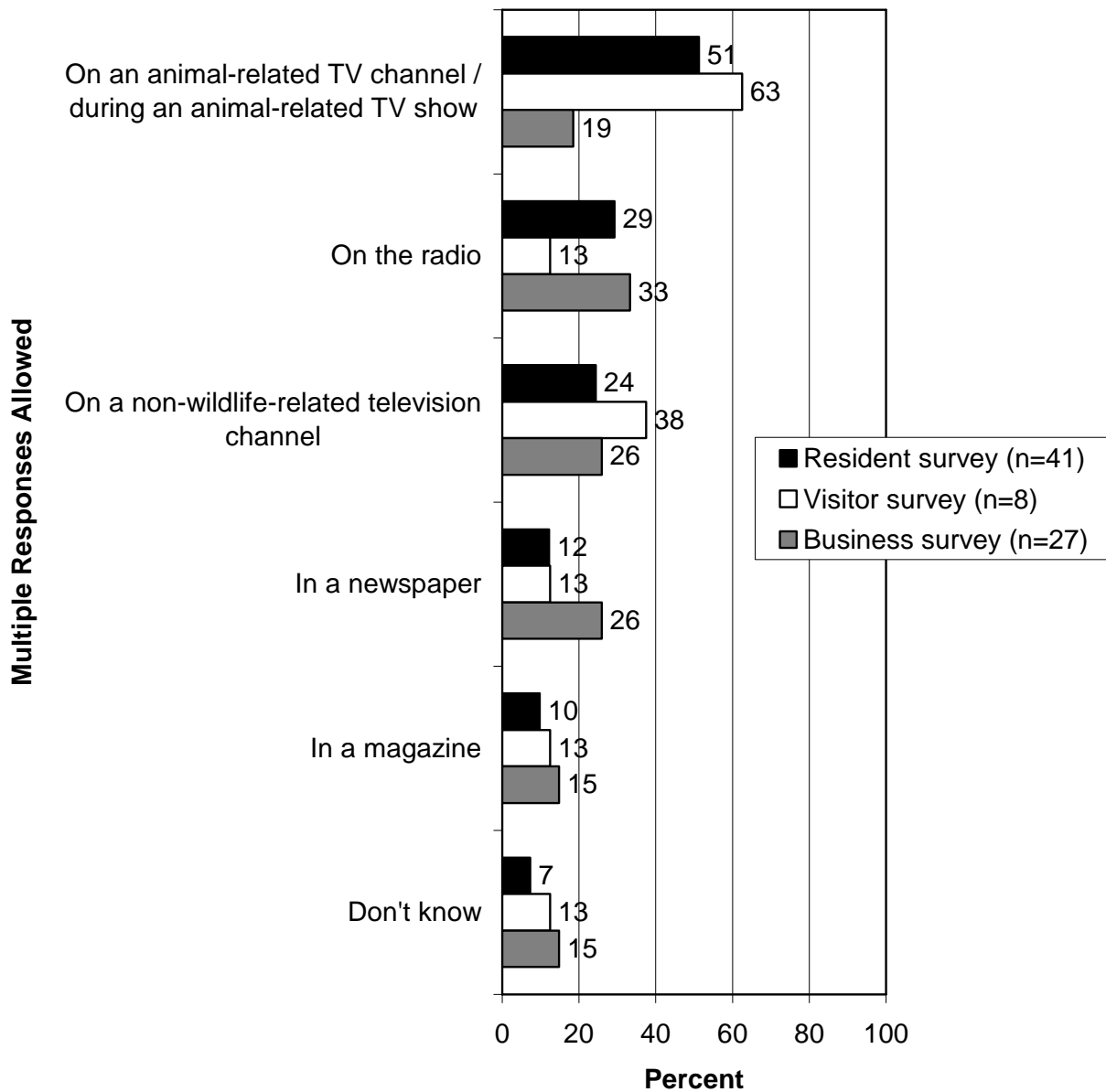
**Q60/Q62/Q13. Where did you read signs about swimming with, touching, or petting dolphins?
(Asked of those who read about swimming with, touching, or petting dolphins from signs.)**



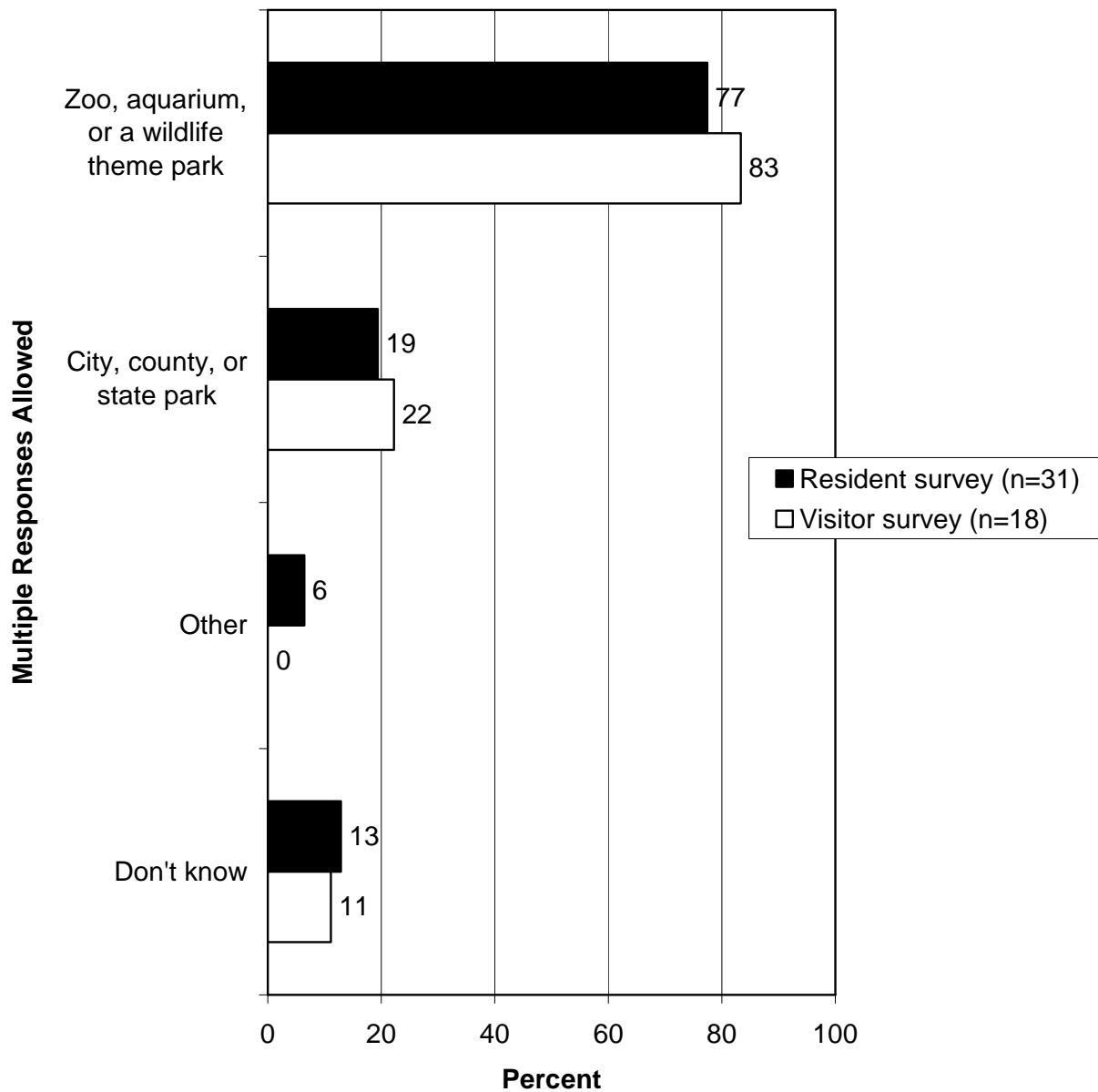
Q64/Q66/Q14. Where did the brochure you read about swimming with, touching, or petting dolphins come from? (Asked of those who read about swimming with, touching, or petting dolphins in a brochure.)



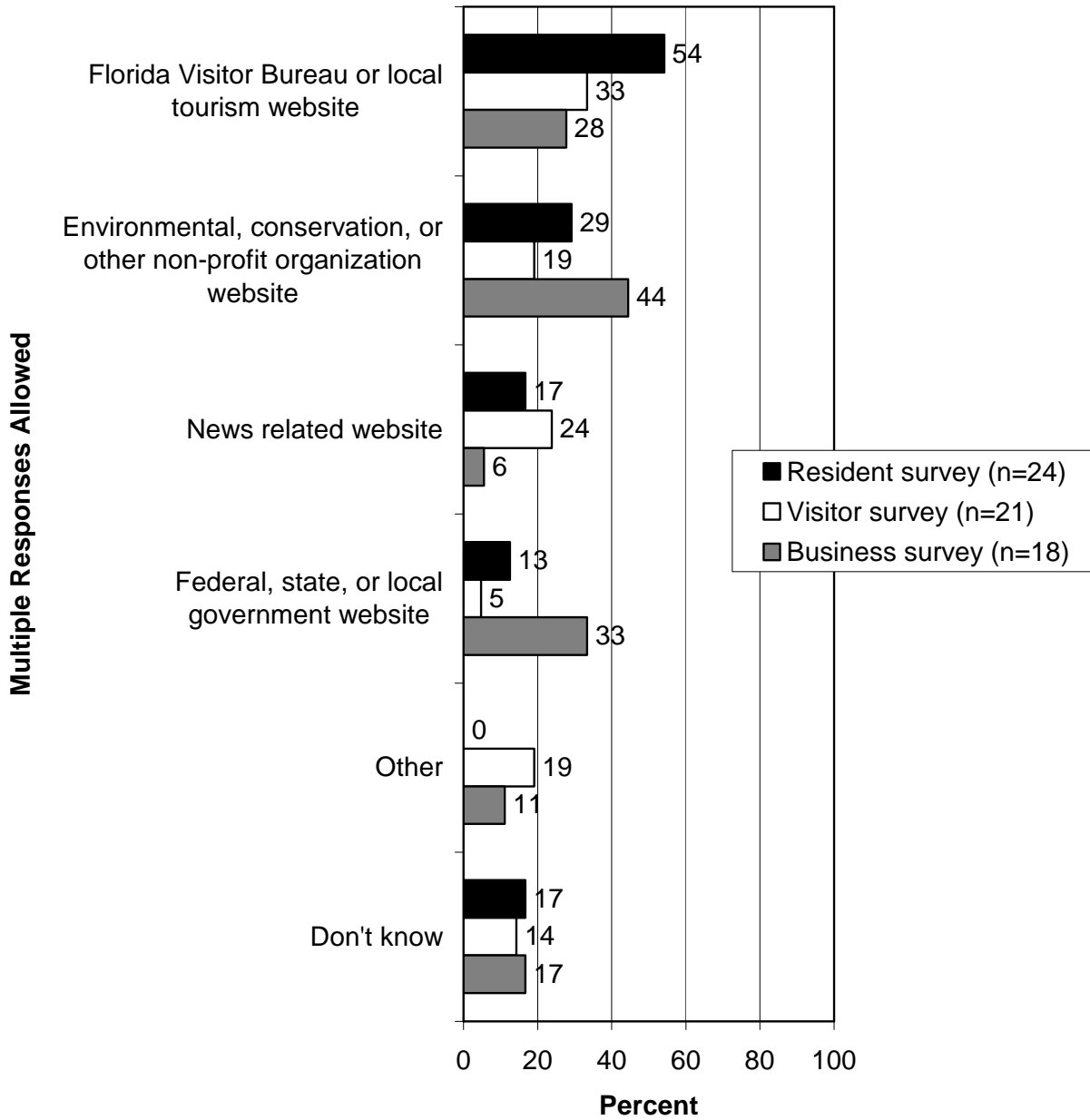
Q68/Q70/Q15. Where did you hear or see a public service announcement about swimming with, touching, or petting dolphins? (Asked of those who heard about swimming with, touching, or petting dolphins from a public service announcement.)



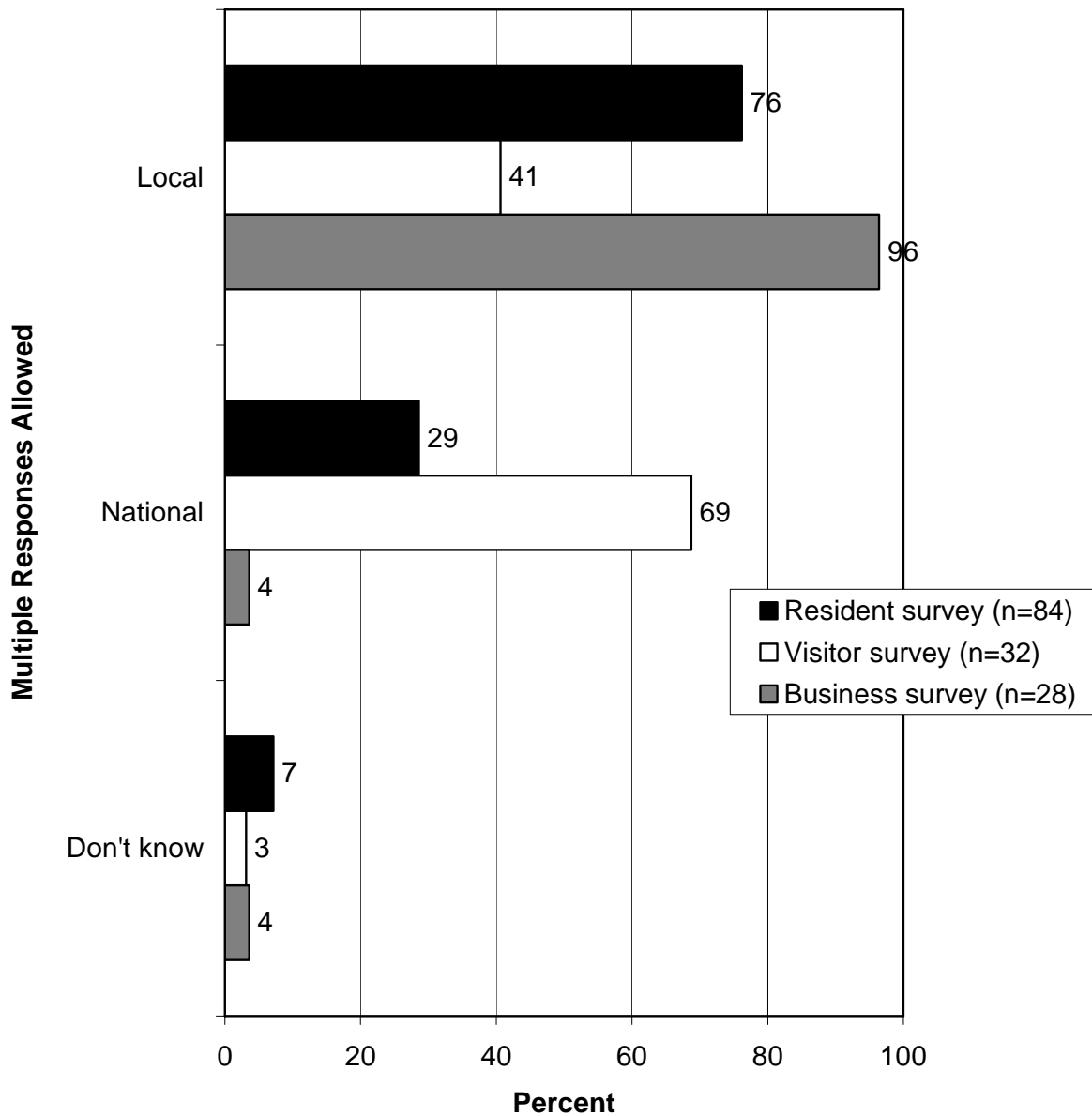
Q71/Q73. At what type of zoological or nature center did you hear or read about swimming with, touching, or petting dolphins? (Asked of those who heard or read about swimming with, touching, or petting dolphins at a zoological or nature center.)



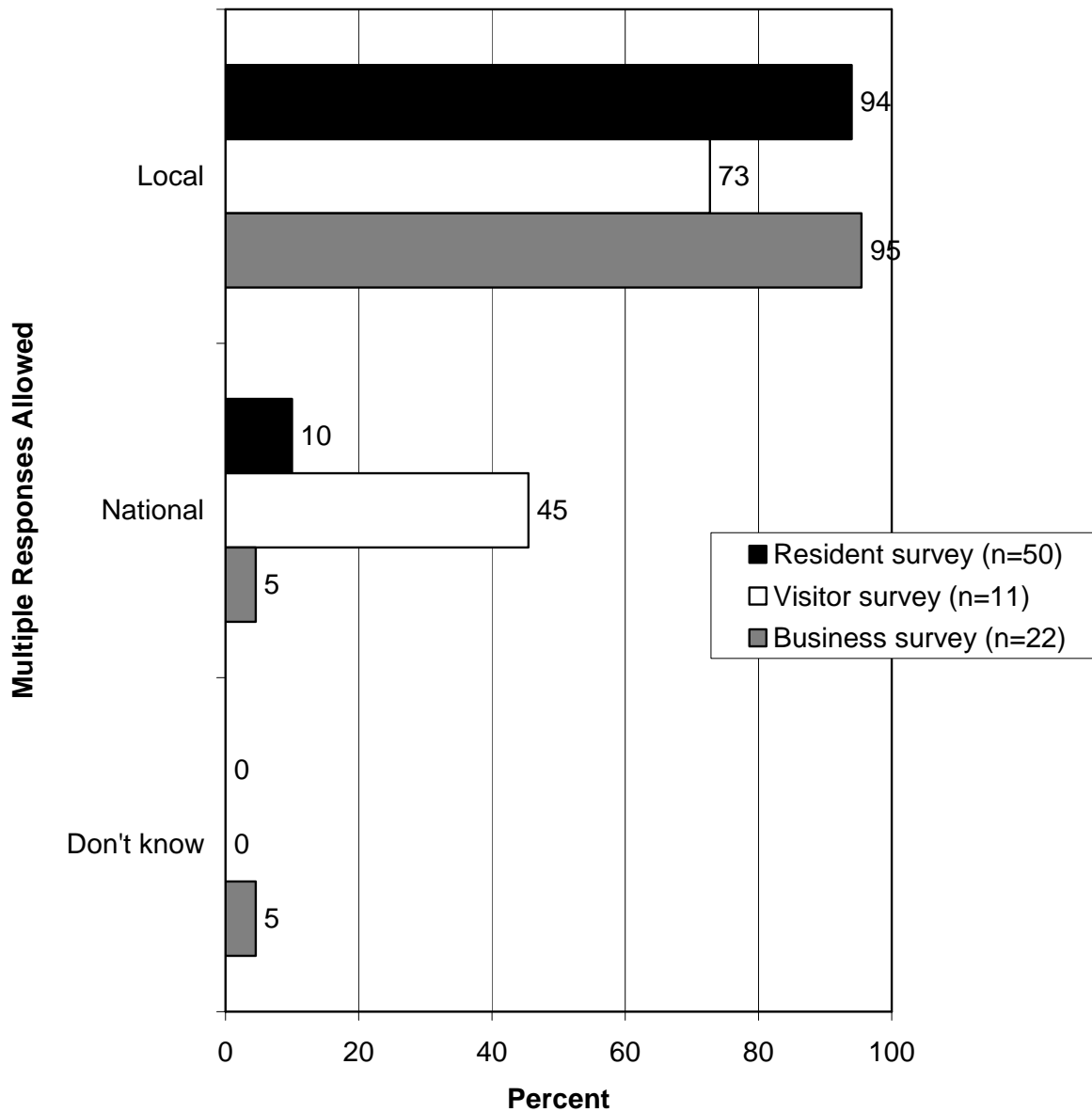
Q75/Q77/Q16. Where on the Internet did you read about swimming with, touching, or petting dolphins? (Asked of those who read about swimming with, touching, or petting dolphins on the Internet.)



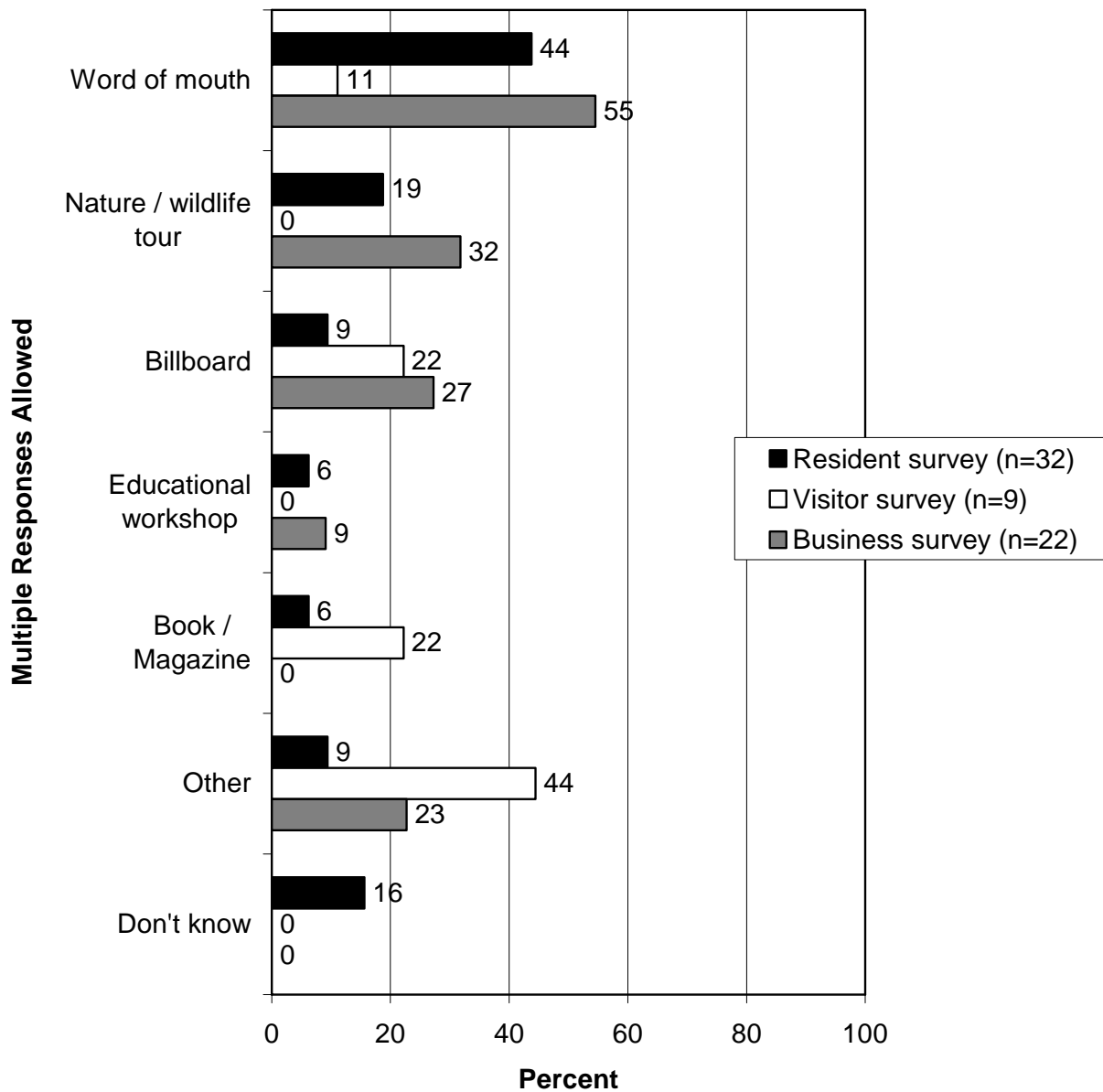
Q79/Q81/Q17. From what type of television news did you hear about swimming with, touching, or petting dolphins? (Asked of those who heard about swimming with, touching, or petting dolphins from television news.)



Q82/Q84/Q18. In what type of newspaper did you read about swimming with, touching, or petting dolphins? (Asked of those who read about swimming with, touching, or petting dolphins in a newspaper.)



**Q86/Q88/Q19. Where else did you hear about swimming with, touching, or petting dolphins?
(Asked of those who heard or read about swimming with, touching, or petting dolphins from a source other than the ones listed.)**



KNOWLEDGE OF THE LEGALITY OF DOLPHIN-HUMAN INTERACTIONS

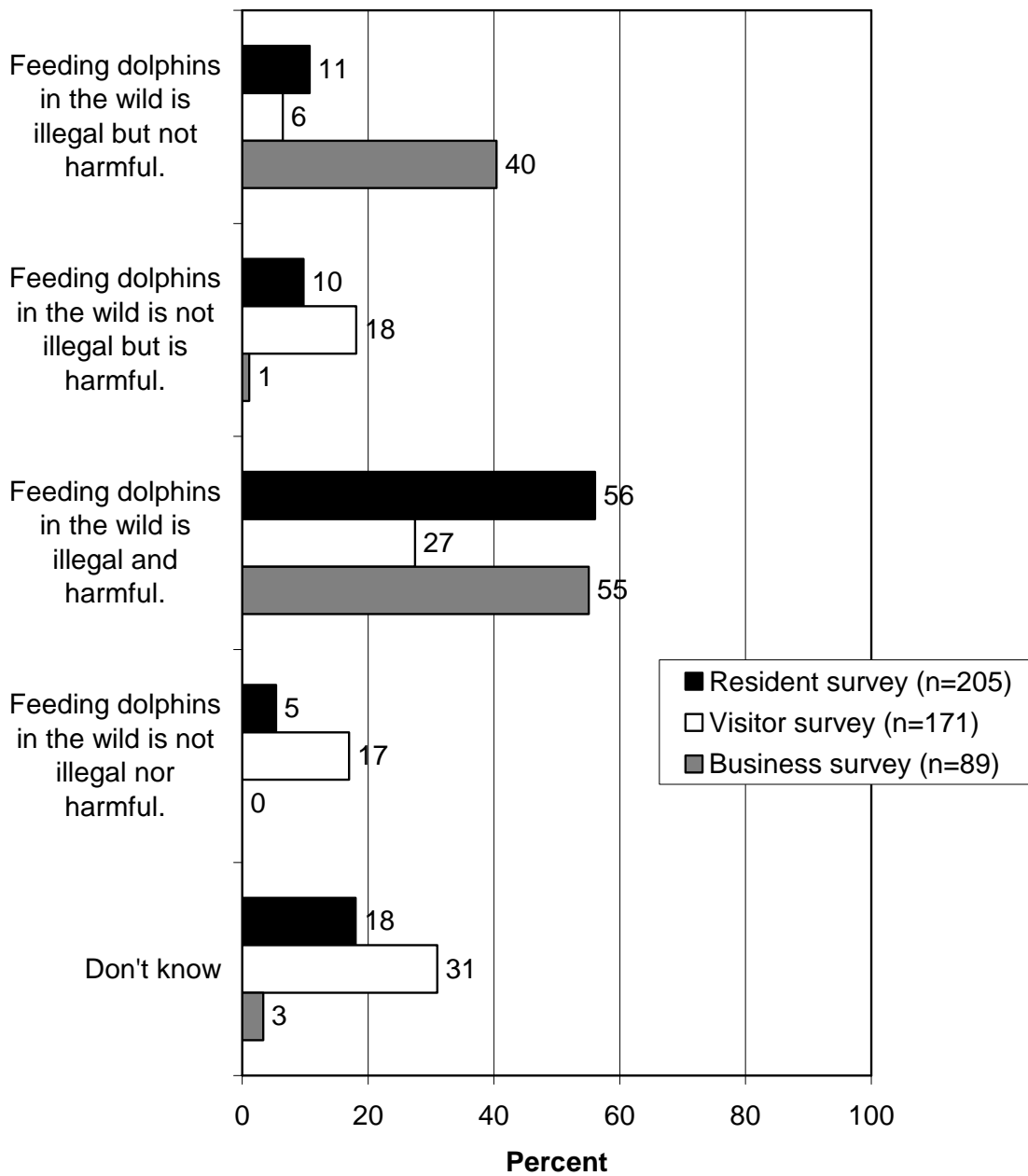
- All three surveys included questions assessing respondents' knowledge of laws regarding feeding and interacting with dolphins; for each question, respondents were given a list of four statements and asked to choose the one that was true in the United States. The statements read as follows (note that "feeding dolphins in the wild" and "swimming with, touching, or petting dolphins in the wild" were asked about in separate questions):
 - Feeding dolphins / swimming with, touching, or petting dolphins in the wild is **illegal but not harmful**.
 - Feeding dolphins / swimming with, touching, or petting dolphins in the wild is **not illegal but is harmful**.
 - Feeding dolphins / swimming with, touching, or petting dolphins in the wild is **illegal and harmful**.
 - Feeding dolphins / swimming with, touching, or petting dolphins in the wild is **not illegal nor harmful**.

- Regarding the legality of feeding dolphins, more than half of residents and business operators give the correct answer (that feeding dolphins in the wild is illegal and harmful), while visitors most commonly say that they do not know.
 - While 56% of **residents** correctly answer that feeding dolphins in the wild is *illegal and harmful*, about a fifth (18%) say they do not know. Otherwise, smaller percentages think it is *illegal but not harmful* (11%), *not illegal but is harmful* (10%), or *not illegal nor harmful* (5%).
 - The nonparametric analysis found that residents who know that feeding dolphins in the wild is illegal and harmful are more likely to have gotten information about feeding dolphins from a public service announcement (an outreach method to which NFMS has devoted rather substantial effort in recent years). (Conversely, residents who did *not* indicate that feeding dolphins in the wild is *illegal and harmful* were more likely to have not gotten information about feeding dolphins from a public service announcement.)

- **Visitors** show a greater range in their answers: while they most often say they are unsure (31%), the next most common answer is the correct one, that feeding dolphins in the wild is *illegal and harmful* (27% of visitors give this answer). Meanwhile, close to a fifth of visitors either say that feeding dolphins in the wild is *not illegal but is harmful* (18%) or is *not illegal nor harmful* (17%). The remaining 6% think it is *illegal but not harmful*.
 - The nonparametric analysis found that visitors who know that feeding dolphins in the wild is *illegal and harmful* were more likely to be employed, while visitors who did *not* indicate that feeding dolphins in the wild is *illegal and harmful* were more likely to not indicate being employed.
 - While the vast majority of **business operators** are aware that feeding dolphins is *illegal*, opinion is split regarding whether or not it is *harmful*: while 55% of business operators correctly think that feeding dolphins in the wild is *illegal and harmful*, 40% say it is *illegal but not harmful*.
 - The crosstabulations found that, among commercial businesses, providers of chartered fishing trips, compared to the other types of businesses, appear the most likely to think that feeding dolphins in the wild is *illegal but not harmful*. Similarly, operators of vessel-based businesses appear more likely than operators of non-vessel-based businesses to believe that feeding dolphins in the wild is *illegal but not harmful* (operators of non-vessel-based businesses appear more likely to know that it is *illegal and harmful* to feed dolphins in the wild).
- Respondents from all three groups most often give the correct answer to the next question regarding the legality of swimming with, touching, or petting dolphins in the wild (that it is *illegal and harmful*). However, notable percentages of respondents from each group give other answers as well:
- Among **residents**, 41% answer correctly, while 20% are unsure. Meanwhile, 14% think it is *not illegal but is harmful*, 13% think it is *illegal but not harmful*, and 12% think it is *not illegal nor harmful*.
 - The nonparametric analysis found that residents who know that swimming with, touching, or petting dolphins in the wild is *illegal and harmful* were more likely to have at least a bachelor's degree, more likely to be employed, and more likely to have

- gotten information about swimming with, touching, or petting dolphins from a public service announcement.
- While a third of **visitors** (33%) give the correct answer, 23% are unsure, with a further 23% thinking that swimming with, touching, or petting dolphins in the wild is *not illegal but is harmful*. Additionally, 15% say it is *not illegal nor harmful*, with 6% saying that it is *illegal but not harmful*.
 - The nonparametric analysis found that visitors who know that swimming with, touching, or petting dolphins in the wild is *illegal and harmful* were more likely to not indicate visiting the Panama City area for pleasure.
 - Among **business operators**, 39% answer correctly, with a further third (31%) saying that swimming with, touching, or petting dolphins in the wild is *illegal but not harmful*. Otherwise, smaller percentages think it is *not illegal nor harmful* (11%), *not illegal but is harmful* (9%), or were unsure or did not respond (9%).
 - The crosstabulations found that operators of commercial businesses that had been in operation for more than the median of 13 years, compared to operators of businesses operating for the median of 13 years or less, appeared more likely to know that swimming with, touching, or petting dolphins in the wild is *illegal and harmful*.

Q15/Q17/Q2. To the best of your knowledge, which statement is true in the United States?



Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—KNOWLEDGE: Indicated that feeding dolphins in the wild is illegal and harmful
PARTICIPATION: Has not participated in at least one of the water-based activities listed in the survey in the Panama City area in the past 2 years ($p \leq 0.01$).
PARTICIPATION: Owns a boat or jet ski ($p \leq 0.05$).
INTEREST: Is not at all interested in feeding dolphins in the wild ($p \leq 0.01$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major factor ($p \leq 0.05$).
KNOWLEDGE: Indicated that feeding dolphins in the wild is harmful (but may or may not have correctly indicated that it is also illegal) ($p \leq 0.001$).
KNOWLEDGE: Indicated that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is illegal and harmful ($p \leq 0.001$).
KNOWLEDGE: Indicated that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is harmful (but may or may not have correctly indicated that it is also illegal) ($p \leq 0.001$).
INFORMATION: Got information about feeding dolphins from a public service announcement ($p < 0.001$).

See page 14, “Interpreting the Nonparametric Analysis Results,” for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

VISITOR SURVEY—KNOWLEDGE: Indicated that feeding dolphins in the wild is illegal and harmful
KNOWLEDGE: Indicated that feeding dolphins in the wild is harmful (but may or may not have correctly indicated that it is also illegal) ($p < 0.001$).
KNOWLEDGE: Indicated that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is illegal and harmful ($p < 0.001$).
KNOWLEDGE: Indicated that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is harmful (but may or may not have correctly indicated that it is also illegal) ($p \leq 0.001$).
DEMOGRAPHIC: Indicated being employed ($p \leq 0.05$).

See page 14, “Interpreting the Nonparametric Analysis Results,” for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—KNOWLEDGE: Did not indicate that feeding dolphins in the wild is illegal and harmful
PARTICIPATION: Has participated in at least one of the water-based activities listed in the survey in the Panama City area in the past 2 years ($p \leq 0.01$).
PARTICIPATION: Does not own a boat or jet ski ($p \leq 0.05$).
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that provision of educational information about dolphins would be a major factor ($p \leq 0.05$).
KNOWLEDGE: Did not indicate that feeding dolphins in the wild is harmful ($p \leq 0.001$).
KNOWLEDGE: Did not indicate that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is illegal and harmful ($p \leq 0.001$).
KNOWLEDGE: Did not indicate that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is harmful ($p \leq 0.001$).
INFORMATION: Did not get information about feeding dolphins from a public service announcement ($p \leq 0.001$).

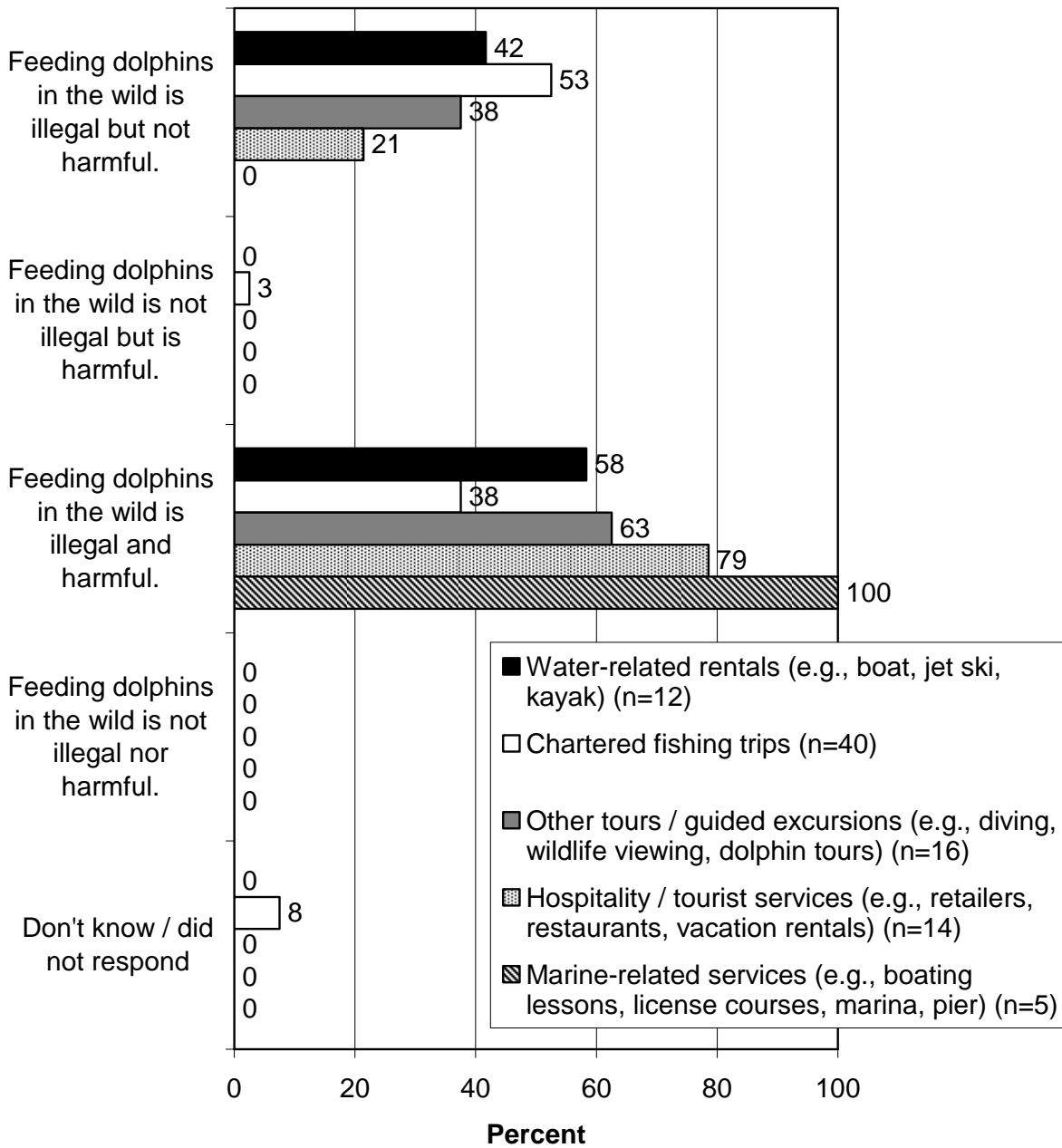
See page 14, “Interpreting the Nonparametric Analysis Results,” for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

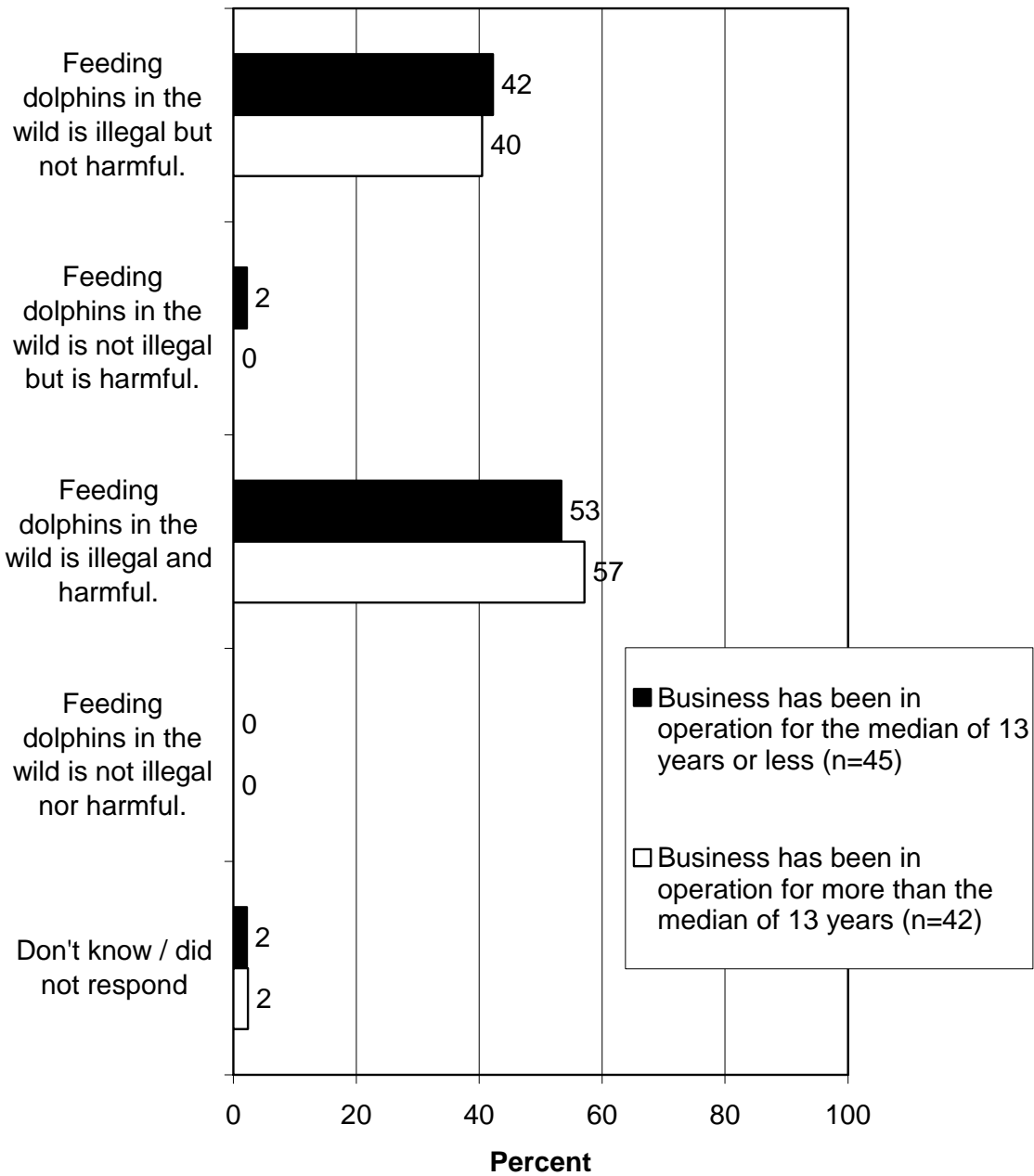
VISITOR SURVEY—KNOWLEDGE: Did not indicate that feeding dolphins in the wild is illegal and harmful
KNOWLEDGE: Did not indicate that feeding dolphins in the wild is harmful ($p \leq 0.001$).
KNOWLEDGE: Did not indicate that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is illegal and harmful ($p \leq 0.001$).
KNOWLEDGE: Did not indicate that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is harmful ($p \leq 0.001$).
DEMOGRAPHIC: Did not indicate being employed ($p \leq 0.05$).

See page 14, “Interpreting the Nonparametric Analysis Results,” for an explanation of how to read the nonparametric analysis tabulations.

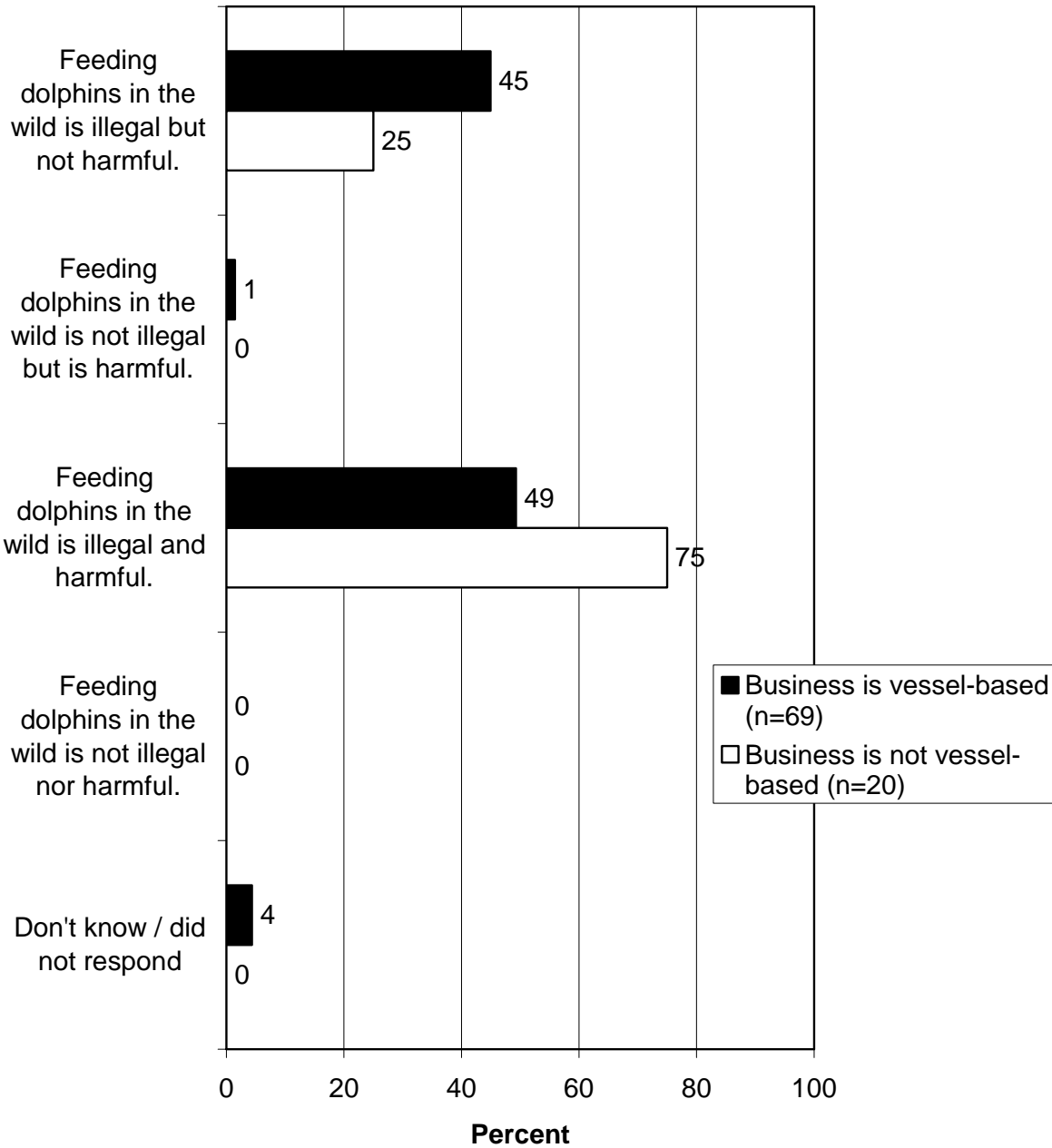
**Q2. To the best of your knowledge, which statement is true in the United States?
(Business survey)**



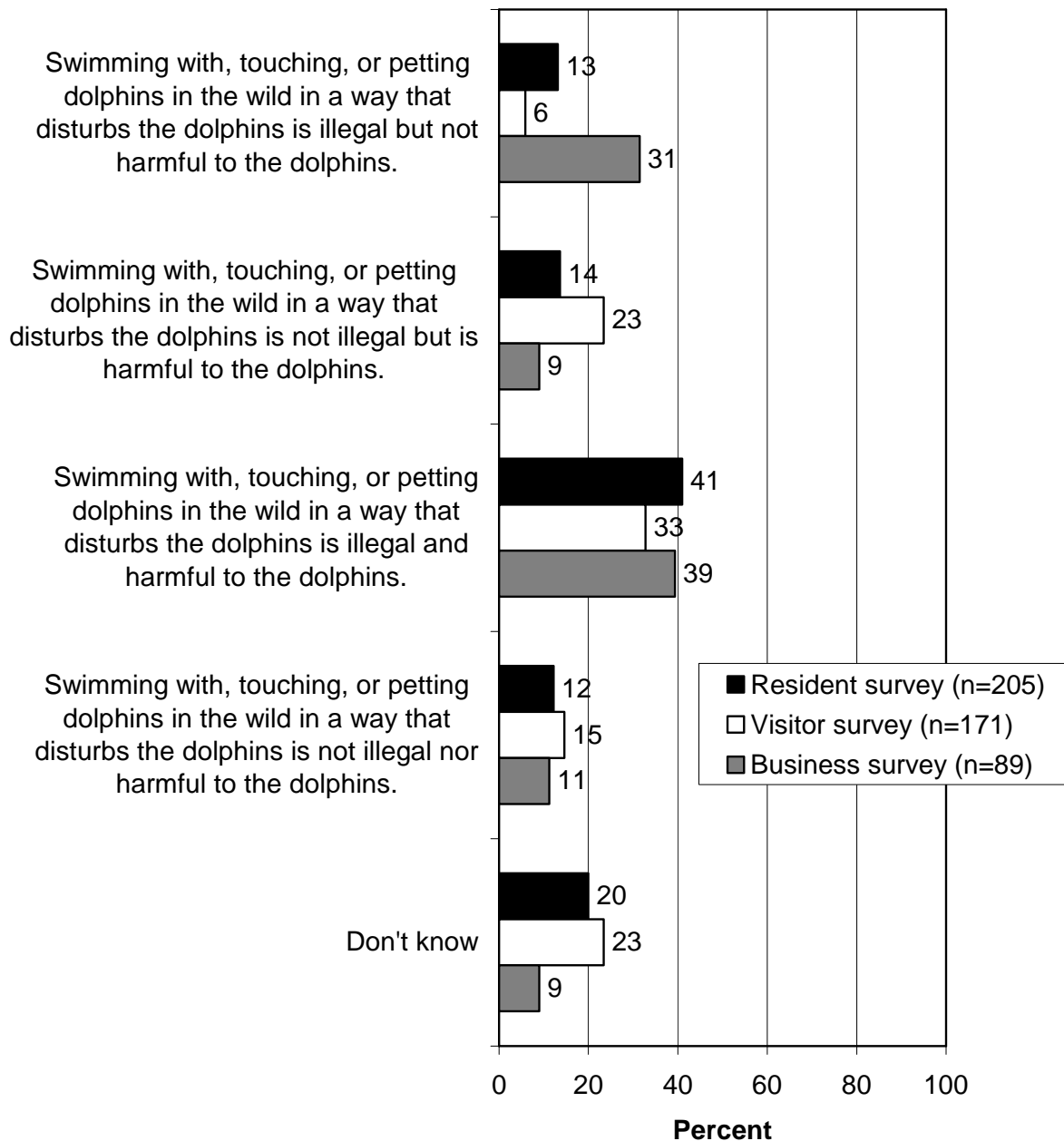
**Q2. To the best of your knowledge, which statement is true in the United States?
(Business survey)**



**Q2. To the best of your knowledge, which statement is true in the United States?
(Business survey)**



Q54/Q56/Q12. To the best of your knowledge, which statement is true in the United States?



Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—KNOWLEDGE: Indicated that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is illegal and harmful
PARTICIPATION: Has not participated in at least one of the water-based activities listed in the survey in the Panama City area in the past 2 years ($p \leq 0.01$).
PARTICIPATION: Has participated in wild dolphin-related activities other than in the Panama City area in the past 2 years ($p \leq 0.05$).
INTEREST: Is not at all interested in feeding dolphins in the wild ($p \leq 0.01$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major factor ($p \leq 0.05$).
ATTITUDE: Is very concerned about protecting wild dolphins ($p \leq 0.05$).
KNOWLEDGE: Indicated that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is harmful (but may or may not have correctly indicated that it is also illegal) ($p \leq 0.001$).
KNOWLEDGE: Indicated that feeding dolphins in the wild is illegal and harmful ($p \leq 0.001$).
KNOWLEDGE: Indicated that feeding dolphins in the wild is harmful (but may or may not have correctly indicated that it is also illegal) ($p \leq 0.001$).
INFORMATION: Got information about feeding dolphins from a public service announcement ($p \leq 0.01$).
INFORMATION: Got information about swimming with, touching, or petting dolphins from a public service announcement ($p \leq 0.05$).
DEMOGRAPHIC: Education level is a bachelor's degree (with or without a higher degree) ($p \leq 0.05$).
DEMOGRAPHIC: Indicated being employed ($p \leq 0.05$).

See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

VISITOR SURVEY—KNOWLEDGE: Indicated that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is illegal and harmful
PARTICIPATION: Did not indicate visiting the Panama City area for pleasure ($p \leq 0.05$).
KNOWLEDGE: Indicated that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is harmful (but may or may not have correctly indicated that it is also illegal) ($p \leq 0.001$).
KNOWLEDGE: Indicated that feeding dolphins in the wild is illegal and harmful ($p \leq 0.001$).
KNOWLEDGE: Indicated that feeding dolphins in the wild is harmful (but may or may not have correctly indicated that it is also illegal) ($p \leq 0.001$).
INFORMATION: Has not heard or read something that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild ($p \leq 0.05$).

See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—KNOWLEDGE: Did not indicate that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is illegal and harmful
PARTICIPATION: Has participated in at least one of the water-based activities listed in the survey in the Panama City area in the past 2 years ($p \leq 0.01$).
PARTICIPATION: Has not participated in wild dolphin-related activities other than in the Panama City area in the past 2 years ($p \leq 0.05$).
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that provision of educational information about dolphins would be a major factor ($p \leq 0.05$).
KNOWLEDGE: Did not indicate that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is harmful ($p \leq 0.001$).
KNOWLEDGE: Did not indicate that feeding dolphins in the wild is illegal and harmful ($p \leq 0.001$).
KNOWLEDGE: Did not indicate that feeding dolphins in the wild is harmful ($p \leq 0.001$).
INFORMATION: Did not get information about feeding dolphins from a public service announcement ($p \leq 0.01$).
INFORMATION: Did not get information about swimming with, touching, or petting dolphins from a public service announcement ($p \leq 0.05$).
DEMOGRAPHIC: Education level is no higher than associate's or trade school degree ($p \leq 0.05$).
DEMOGRAPHIC: Did not indicate being employed ($p \leq 0.05$).

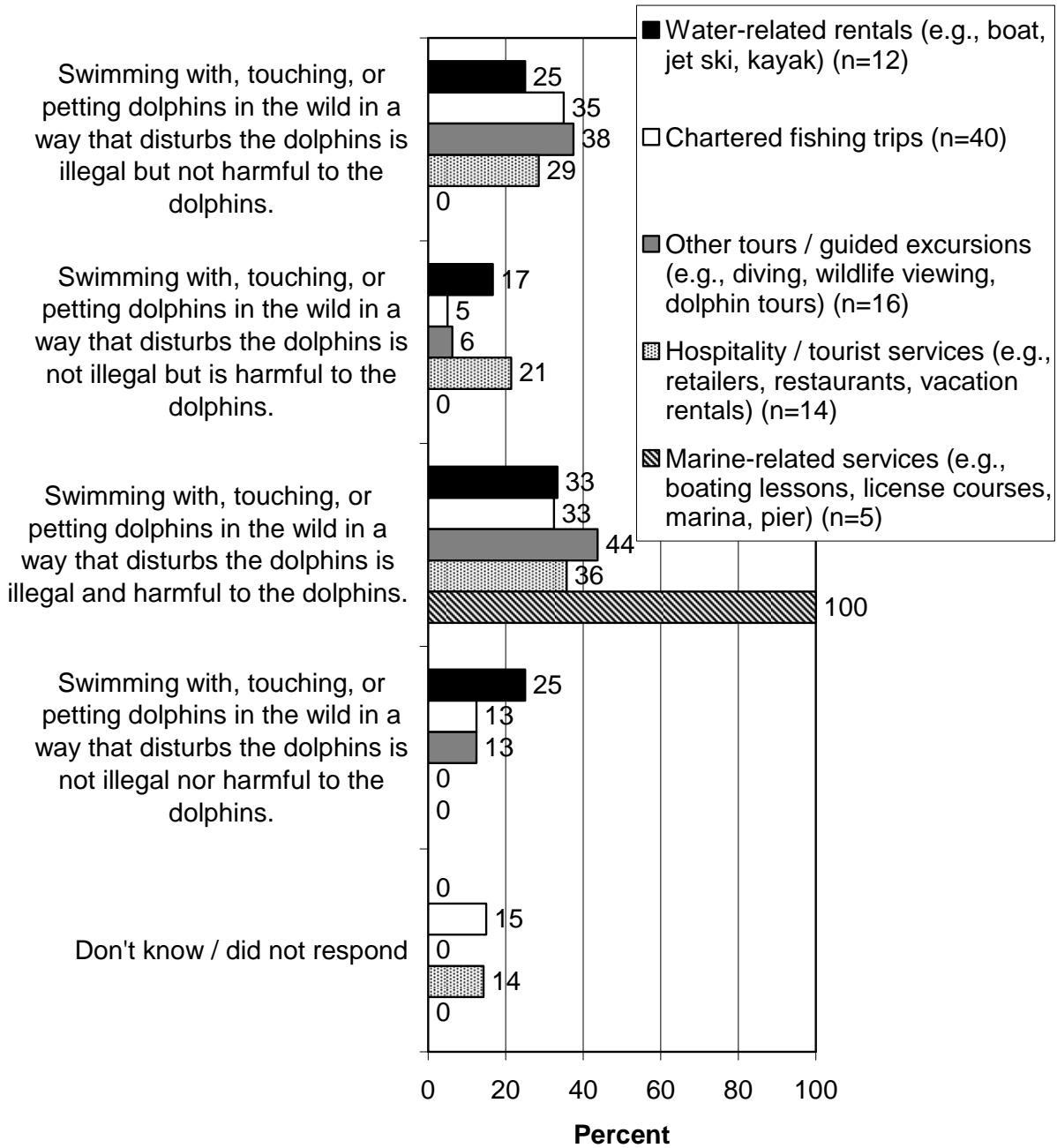
See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

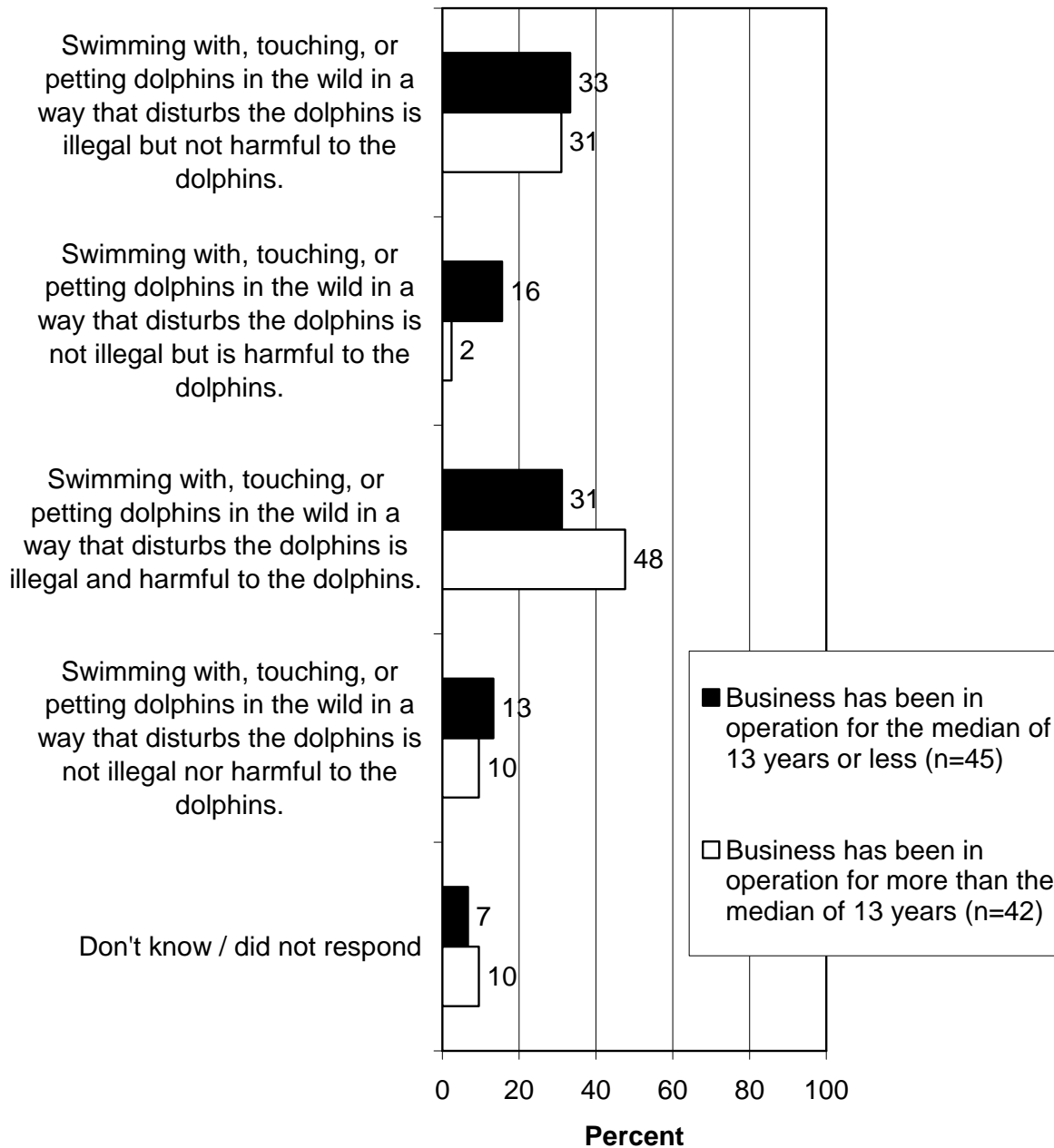
VISITOR SURVEY—KNOWLEDGE: Did not indicate that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is illegal and harmful
PARTICIPATION: Visited the Panama City area for pleasure ($p \leq 0.05$).
KNOWLEDGE: Did not indicate that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is harmful ($p \leq 0.001$).
KNOWLEDGE: Did not indicate that feeding dolphins in the wild is illegal and harmful ($p \leq 0.001$).
KNOWLEDGE: Did not indicate that feeding dolphins in the wild is harmful ($p \leq 0.001$).
INFORMATION: Has heard or read something that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild ($p \leq 0.05$).

See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

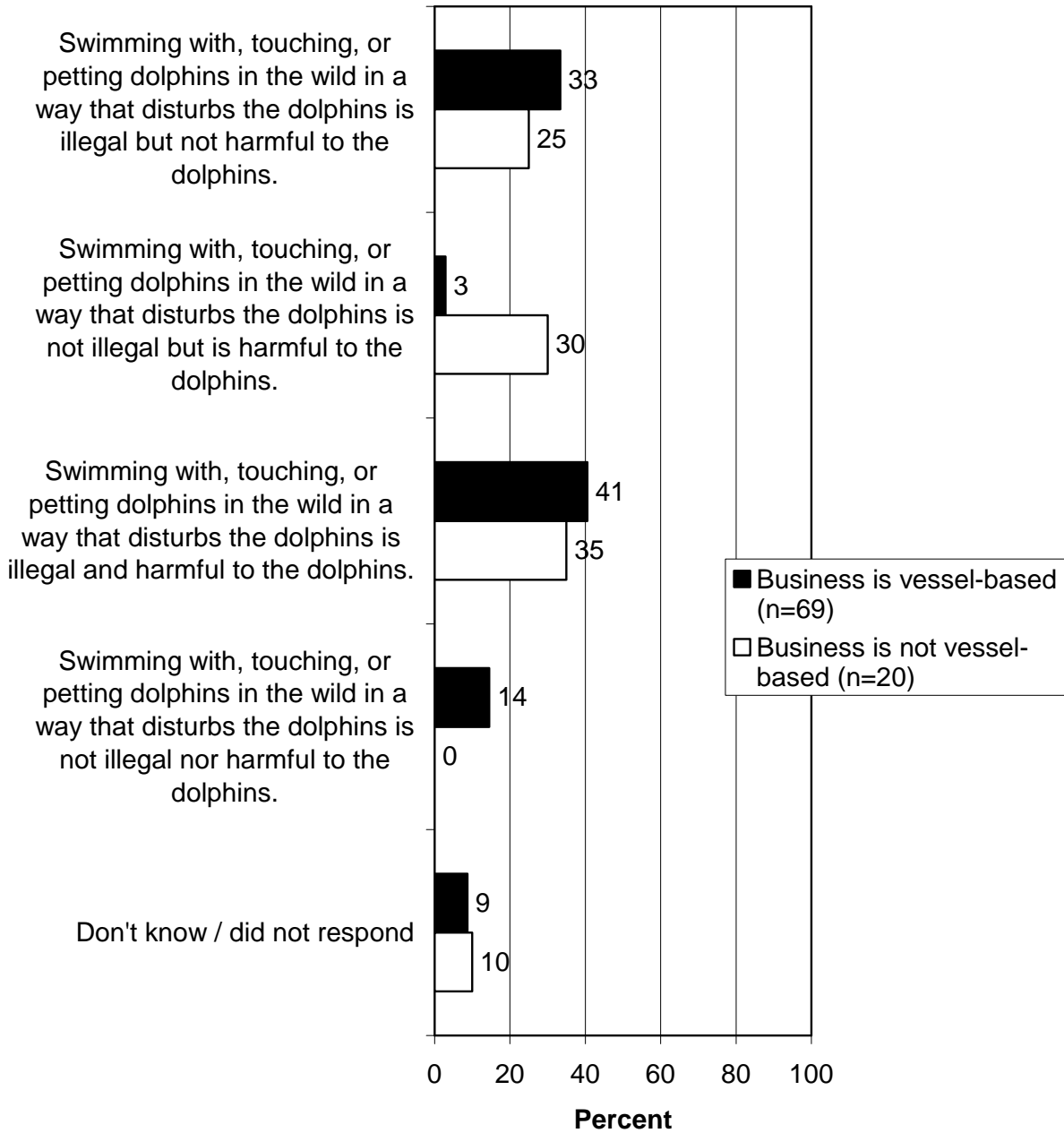
**Q12. To the best of your knowledge, which statement is true in the United States?
(Business survey)**



**Q12. To the best of your knowledge, which statement is true in the United States?
(Business survey)**



**Q12. To the best of your knowledge, which statement is true in the United States?
(Business survey)**



PARTICIPATION IN WATER-BASED RECREATION AND DOLPHIN-RELATED ACTIVITIES

This section presents the results regarding residents' and visitors' participation in water-based recreation and dolphin-related activities. Although the survey results from the two groups are tabulated on the same graphs in this section, the discussions below are separated by respondent type.

- The top water-based recreational activities in which **residents** have participated in the Panama City area in the past two years include swimming at the beach (50%), fishing (40%), swimming from a boat (30%), and snorkeling (21%). Notable percentages of residents have participated in jet skiing (15%), kayaking (13%), and scuba diving (11%), while over a quarter of the sample (29%) have not participated in any of the activities the survey asked about within the past two years in Panama City.

- Only a small percentage of **residents** (11%) have viewed dolphins as part of a paid wild dolphin-viewing tour in the Panama City area in the past two years (most of this group took part in a boat-based tour of some type). In the same time period, however, a quarter of residents (25%) have gone out specifically to view wild dolphins but not as part of a paid dolphin-viewing tour: the most common types of these outings are on boats belonging to the respondent or someone in the respondent's group (11%), from a beach, pier, or shore (8%), or from a jet ski (2%).
 - Most residents who participated in wild dolphin-related activities in the Panama City area in the past two years did so no more than five times (57%), while almost a fifth (17%) went just one time. The median number of times residents participated in wild dolphin-related activities in the Panama City area in the past two years was four times.
 - Just 8% of the resident sample had participated in wild dolphin-related activities in a location *other than* the Panama City area (excluding theme parks) in the two years prior to the survey, and the most common of these activities included viewing dolphins from a beach, pier, or shore (44% of those who engaged in dolphin-related activities somewhere other than in Panama City) and viewing dolphins from a type of boat other than a jet ski or kayak (38%). Residents who engaged in wild dolphin-related activities *other than* in

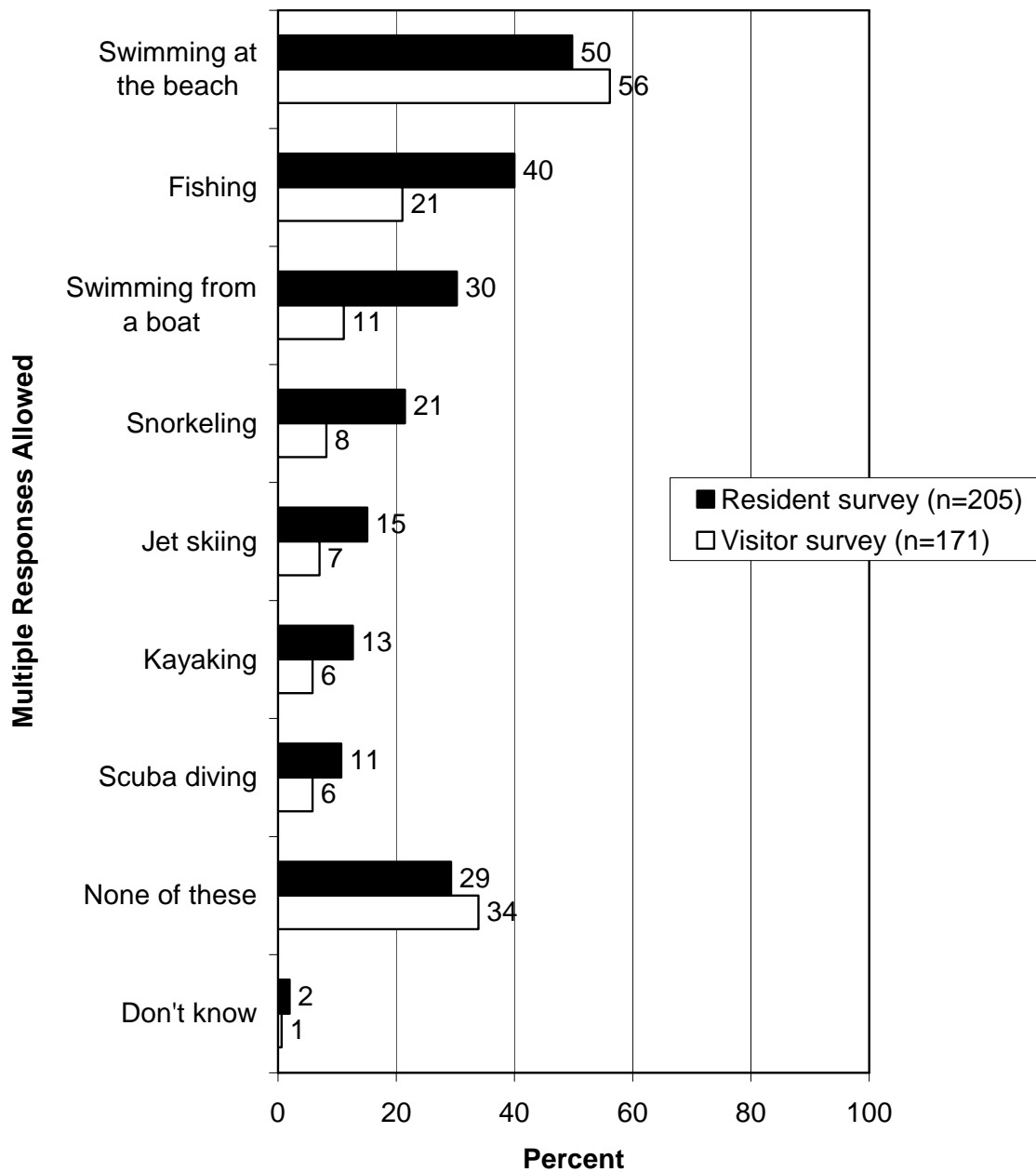
the Panama City area most often did so at other locations in Florida, or indicated no specific location (i.e., they viewed dolphins while participating in some other activity).

- The top water-based recreational activities in which **visitors** participated in the Panama City area in the past two years were swimming at the beach (56%) and fishing (21%), with smaller percentages participating in swimming from a boat (11%), snorkeling (8%), jet skiing (7%), kayaking (6%), and scuba diving (6%). A third of visitors (34%) had not participated in any of the activities listed.
- The vast majority of the **visitors** surveyed (87%) indicated visiting the Panama City metro area for pleasure (as opposed to work). Among those who visited the Panama City metro area for pleasure, small percentages said that viewing dolphins in the wild was either their main reason (9%) or one of their reasons (9%) for visiting. Among visitors who visited the area for pleasure and who indicated that viewing dolphins was the main reason or one of the main reasons for visiting, 18% viewed dolphins as part of a paid dolphin-viewing tour, and 18% viewed dolphins from another type of boat. Much smaller numbers of individuals within this group viewed dolphins from a jet ski (4%), from a kayak (4%), swam with dolphins in the wild (4%), snorkeled with dolphins in the wild (4%), or scuba dove with dolphins in the wild (4%). Otherwise, 64% of visitors who visited the Panama City metro area for pleasure and who indicated that viewing dolphins was the main reason or one of the main reasons for visiting did not engage in any dolphin-viewing activities.
- Among all **visitors** surveyed (not just those who visited Panama City for pleasure or who visited for dolphin-related reasons), 12% viewed dolphins as part of a paid wild dolphin-viewing tour in the Panama City area in the past two years. In the same time period, 13% of visitors have gone out specifically to view wild dolphins but not as part of a paid dolphin-viewing tour: the most common types of these outings are from a beach, pier, or shore (7%), or from a boat belonging to the respondent or someone in their group (2%).
 - Half of those visitors who participated in wild dolphin-related activities in the Panama City area in the past two years did so just once (51%), and the median number of times

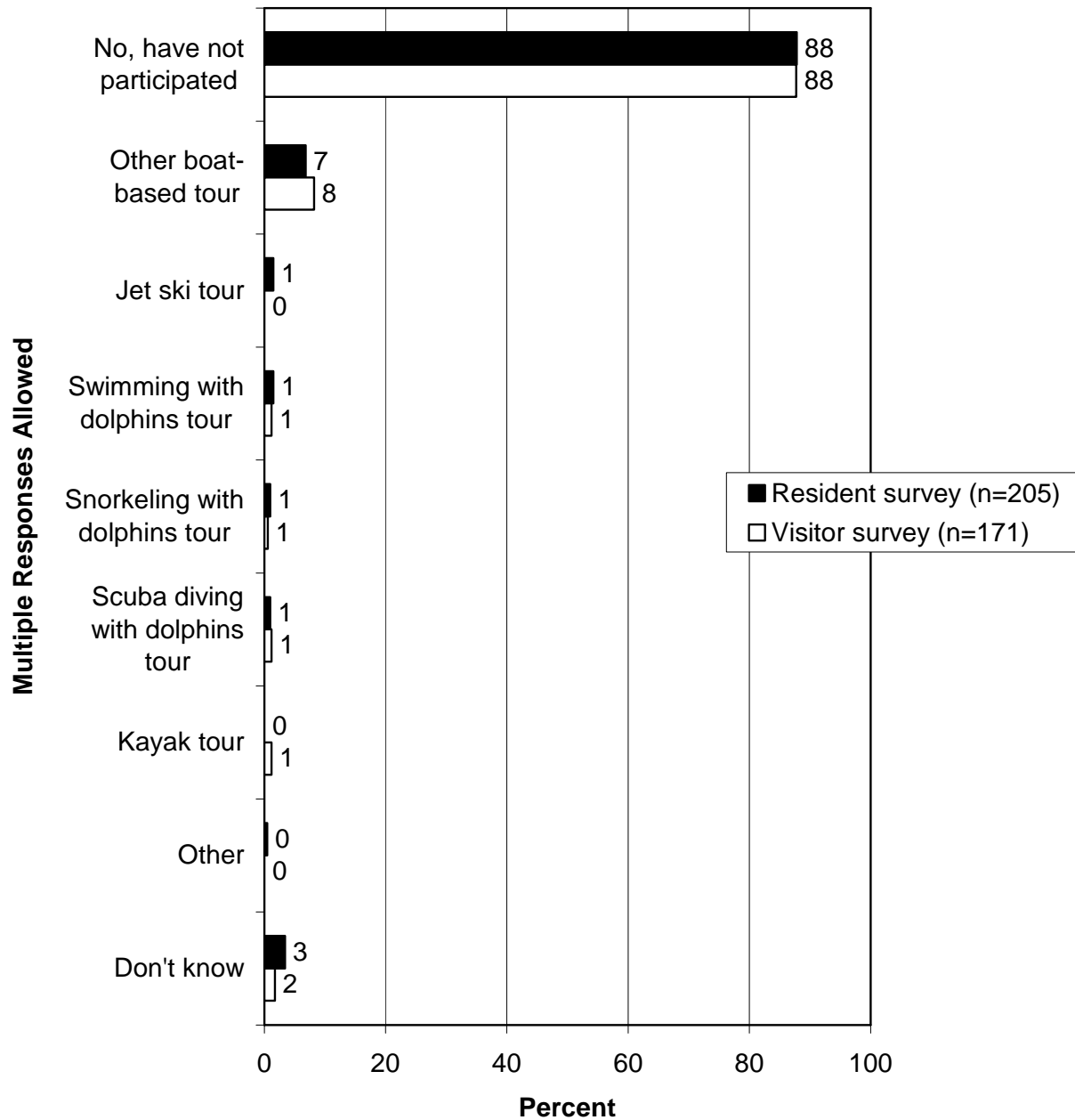
visitors participated in wild dolphin-related activities in the Panama City area in the past two years was one time.

- Just over a tenth of visitors (12%) participated in wild dolphin-related activities in a location *other than* the Panama City area (excluding theme parks) in the two years prior to the survey, with the most common of these activities being viewing dolphins as part of a paid dolphin-viewing tour (30% of those who engaged in dolphin-related activities somewhere other than in Panama City), viewing dolphins from a beach, pier, or shore (25%), and viewing dolphins from a type of boat other than a jet ski or kayak (25%). Visitors who engaged in wild dolphin-related activities *other than* in the Panama City area most often did so at other locations in Florida (35%), in the Caribbean, Gulf of Mexico, or Central America (25%), or in no specific location (i.e., they viewed dolphins while participating in some other activity) (20%).

Q101/Q124. Over the past 2 years, have you done any of the following activities in the Panama City area?



Q90/Q113. Over the past 2 years, have you viewed dolphins as part of a paid wild dolphin-viewing tour in the Panama City area? If yes, which types?



Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—PARTICIPATION: Has viewed dolphins as part of a paid wild dolphin viewing tour in the Panama City area in the past 2 years
PARTICIPATION: Has viewed dolphins on own in the Panama City area in the past 2 years (not as part of a paid wild dolphin viewing tour) ($p \leq 0.01$).
PARTICIPATION: Has not participated in at least one of the water-based activities listed in the survey in the Panama City area in the past 2 years ($p \leq 0.05$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major factor ($p \leq 0.05$).
DEMOGRAPHIC: Has lived in the Panama City area the median number of years (25) or less ($p \leq 0.05$).

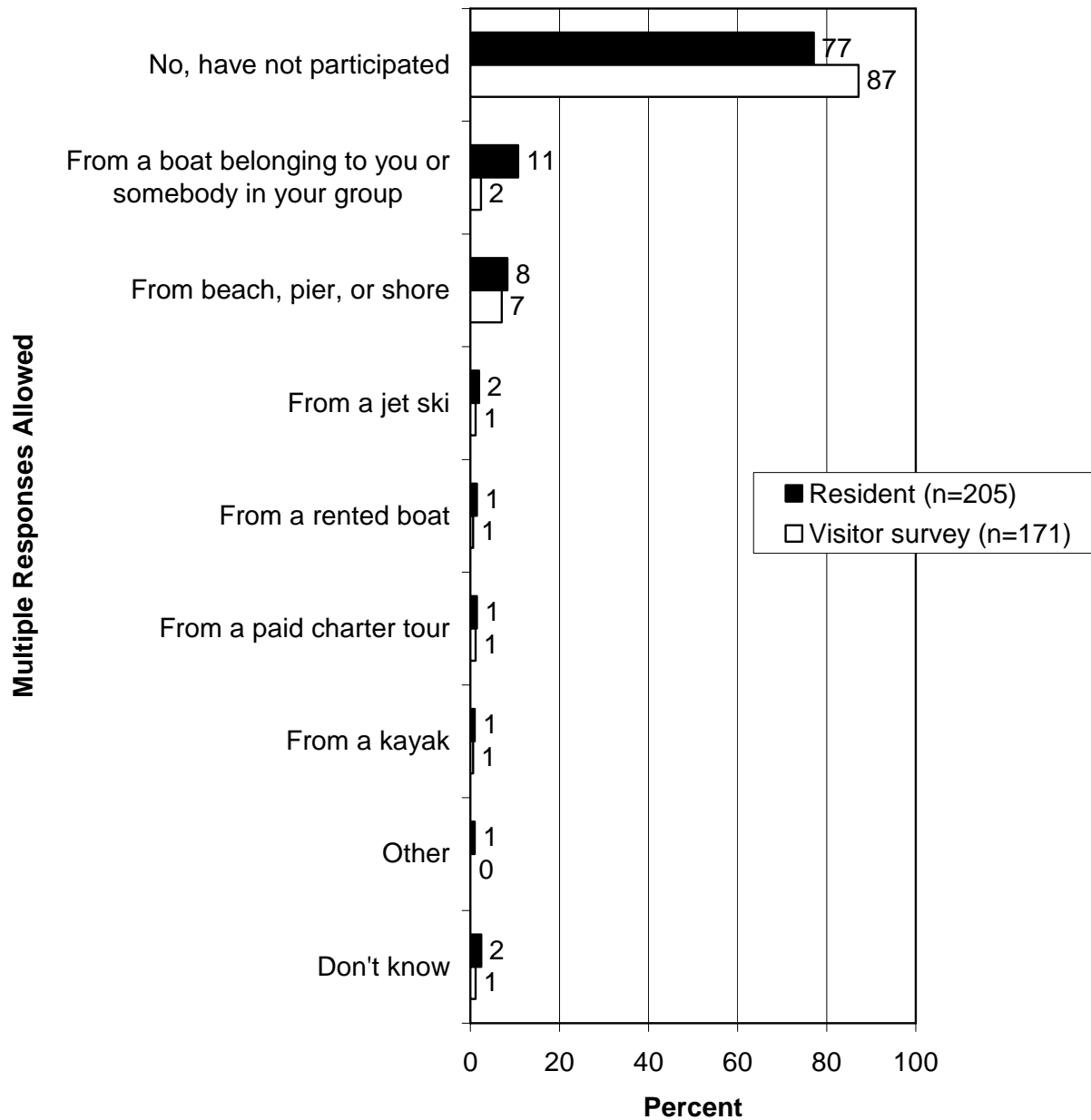
See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

VISITOR SURVEY—PARTICIPATION: Has viewed dolphins as part of a paid wild dolphin viewing tour in the Panama City area in the past 2 years
PARTICIPATION: Has not participated in at least one of the water-based activities listed in the survey in the Panama City area in the past 2 years ($p \leq 0.05$).
INFORMATION: Has not heard or read something that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild ($p \leq 0.05$).
DEMOGRAPHIC: Is female ($p \leq 0.01$).

See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

Q94/Q117. Over the past 2 years, have you gone out specifically to view wild dolphins but not part of a paid dolphin-viewing tour in the Panama City area? If yes, which types?



Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—PARTICIPATION: Has viewed dolphins on own in the Panama City area in the past 2 years (not as part of a paid wild dolphin viewing tour)
PARTICIPATION: Has not participated in at least one of the water-based activities listed in the survey in the Panama City area in the past 2 years ($p \leq 0.001$).
PARTICIPATION: Owns a boat or jet ski ($p \leq 0.01$).
PARTICIPATION: Has viewed dolphins as part of a paid wild dolphin viewing tour in the Panama City area in the past 2 years ($p \leq 0.01$).
INTEREST: Is very interested in closely interacting with dolphins in the wild ($p \leq 0.01$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major or minor factor ($p \leq 0.05$).
INFORMATION: Got information about swimming with, touching, or petting dolphins from a public service announcement ($p \leq 0.01$).
INFORMATION: Got information about feeding dolphins from a public service announcement ($p \leq 0.05$).
DEMOGRAPHIC: Is a member of or has donated to a boating, fishing, recreation, or conservation organization ($p \leq 0.01$).

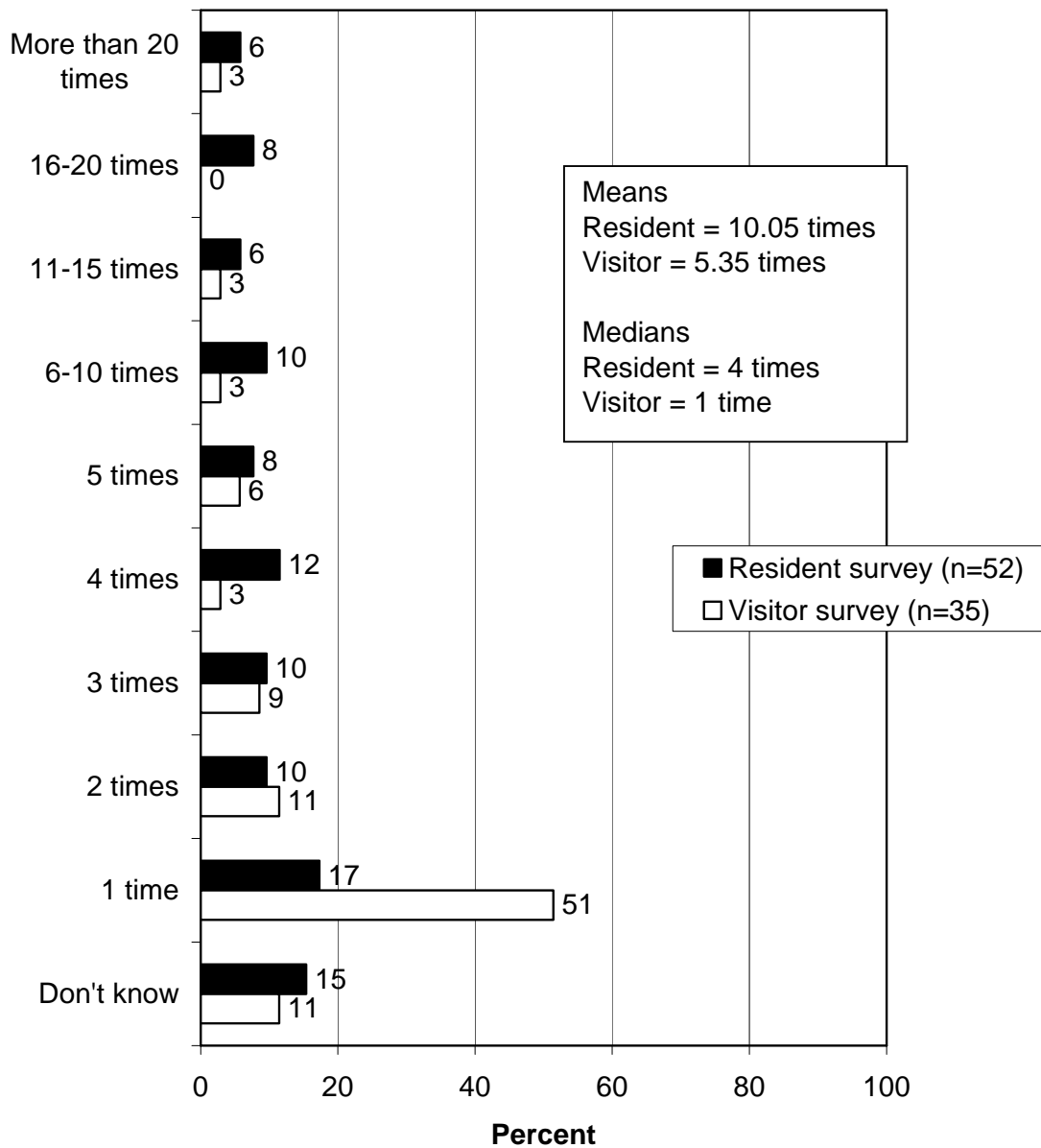
See page 14, “Interpreting the Nonparametric Analysis Results,” for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

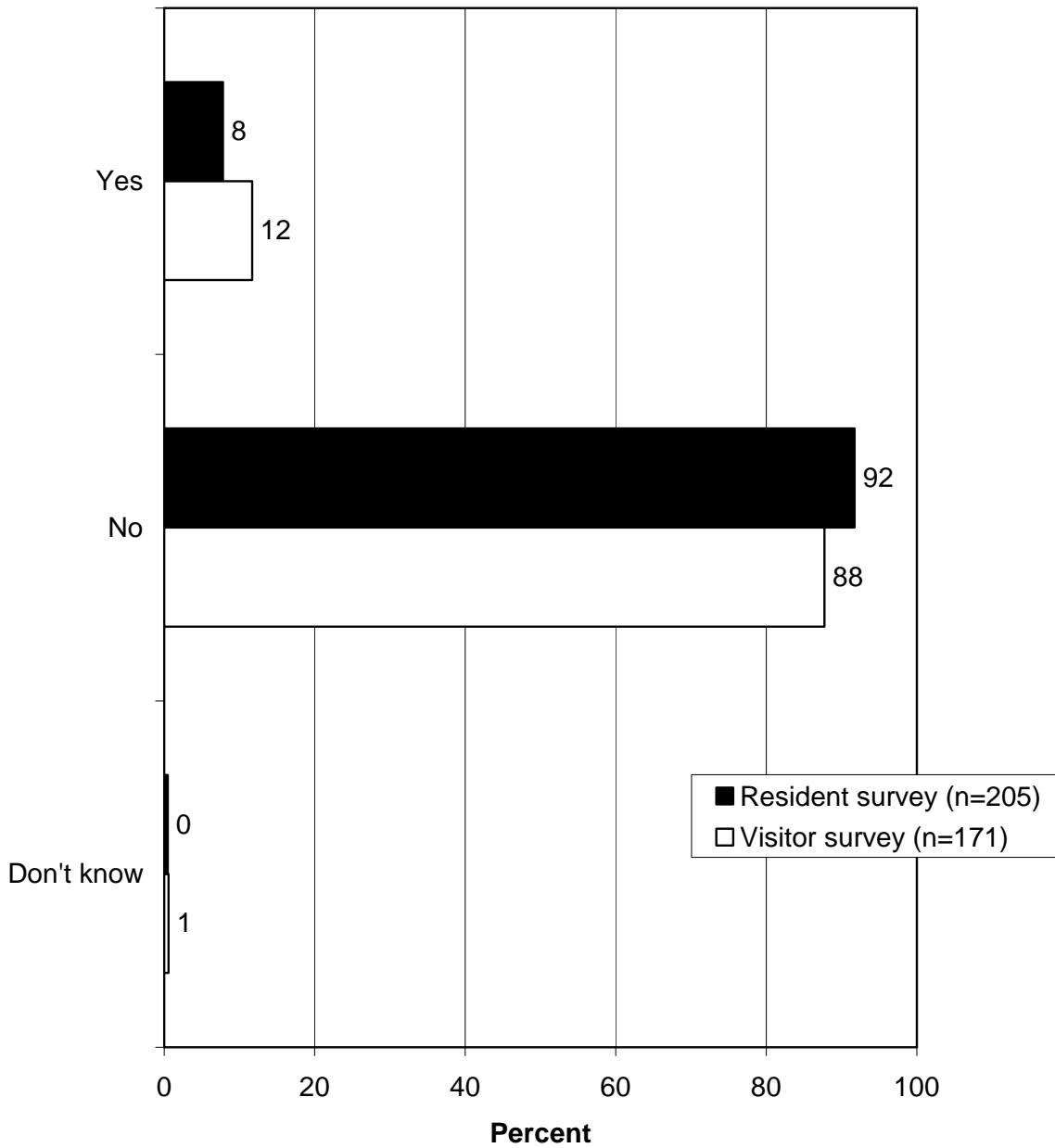
VISITOR SURVEY—PARTICIPATION: Has viewed dolphins on own in the Panama City area in the past 2 years (not as part of a paid wild dolphin viewing tour)
PARTICIPATION: Has participated in wild dolphin-related activities other than in the Panama City area in the past 2 years ($p < 0.01$).
PARTICIPATION: Owns a boat or jet ski ($p \leq 0.05$).
INTEREST: Is very interested in closely interacting with dolphins in the wild ($p \leq 0.001$).
INTEREST: Is very interested in feeding dolphins in the wild ($p \leq 0.05$).
KNOWLEDGE: Indicated that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is harmful (but may or may not have correctly indicated that it is also illegal) ($p \leq 0.05$).
DEMOGRAPHIC: Is younger than 65 years old ($p \leq 0.01$).

See page 14, “Interpreting the Nonparametric Analysis Results,” for an explanation of how to read the nonparametric analysis tabulations.

Q96/Q119. How many times have you participated in wild dolphin-related activities, including just viewing, in the Panama City area in the past 2 years? (Asked of those who have participated in wild dolphin-related activities in the Panama City area in the past 2 years.)



Q102/Q125. In the past 2 years, have you participated in wild dolphin-related activities, including viewing, anywhere other than in the Panama City area, excluding at a theme park?



Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—PARTICIPATION: Has participated in wild dolphin-related activities other than in the Panama City area in the past 2 years
PARTICIPATION: Has not participated in at least one of the water-based activities listed in the survey in the Panama City area in the past 2 years ($p \leq 0.05$).
KNOWLEDGE: Indicated that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is illegal and harmful ($p \leq 0.05$).
DEMOGRAPHIC: Is a member of or has donated to a boating, fishing, recreation, or conservation organization ($p \leq 0.05$).

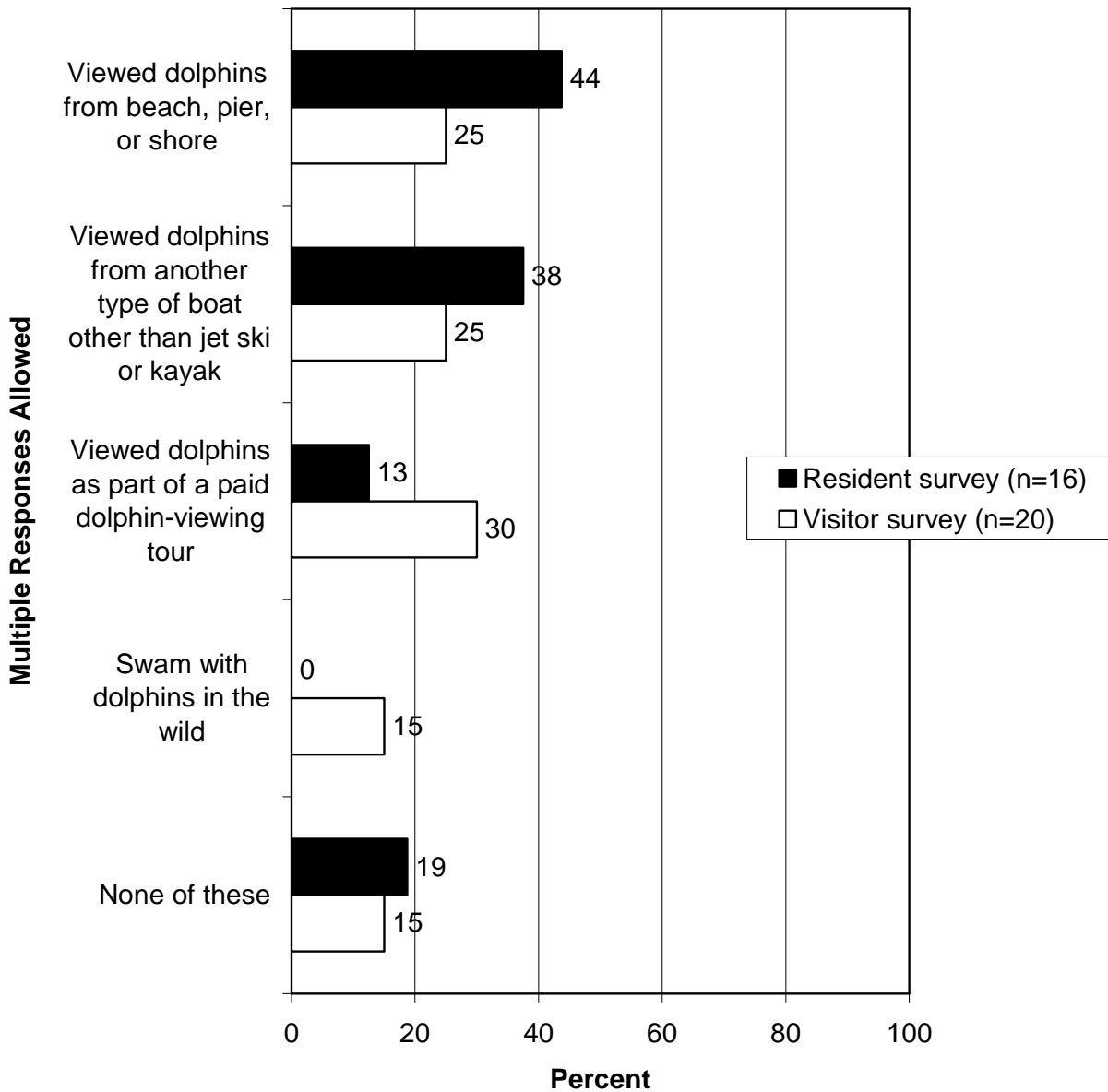
See page 14, “Interpreting the Nonparametric Analysis Results,” for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

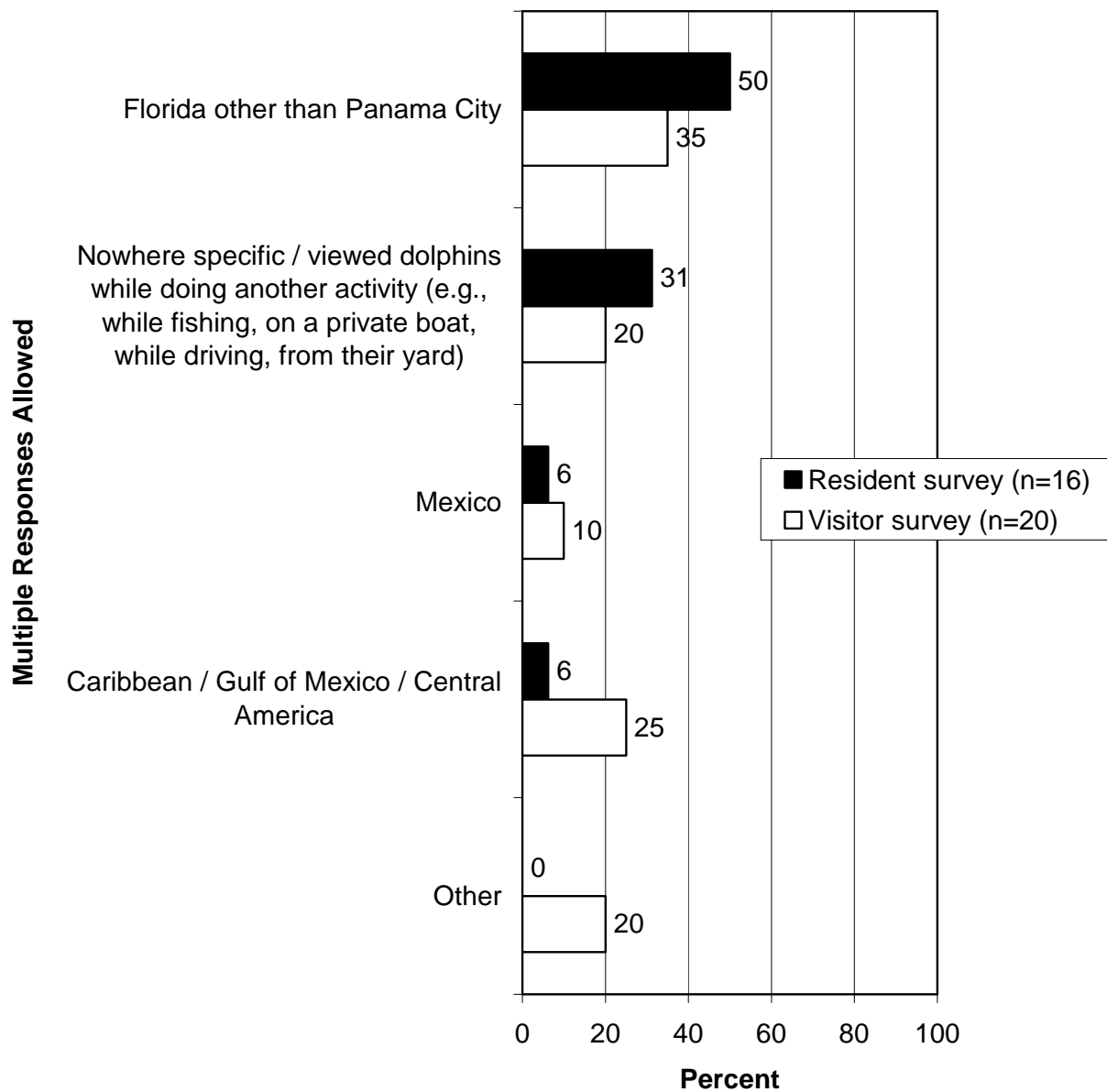
VISITOR SURVEY—PARTICIPATION: Has participated in wild dolphin-related activities other than in the Panama City area in the past 2 years
PARTICIPATION: Has viewed dolphins on own in the Panama City area in the past 2 years (not as part of a paid wild dolphin viewing tour) ($p \leq 0.01$).
PARTICIPATION: Owns a boat or jet ski ($p \leq 0.01$).
INFORMATION: Has heard or read something that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild ($p \leq 0.05$).
DEMOGRAPHIC: Is younger than 65 years old ($p \leq 0.05$).
DEMOGRAPHIC: Is a member of or has donated to a boating, fishing, recreation, or conservation organization ($p \leq 0.05$).
DEMOGRAPHIC: Is female ($p \leq 0.05$).

See page 14, “Interpreting the Nonparametric Analysis Results,” for an explanation of how to read the nonparametric analysis tabulations.

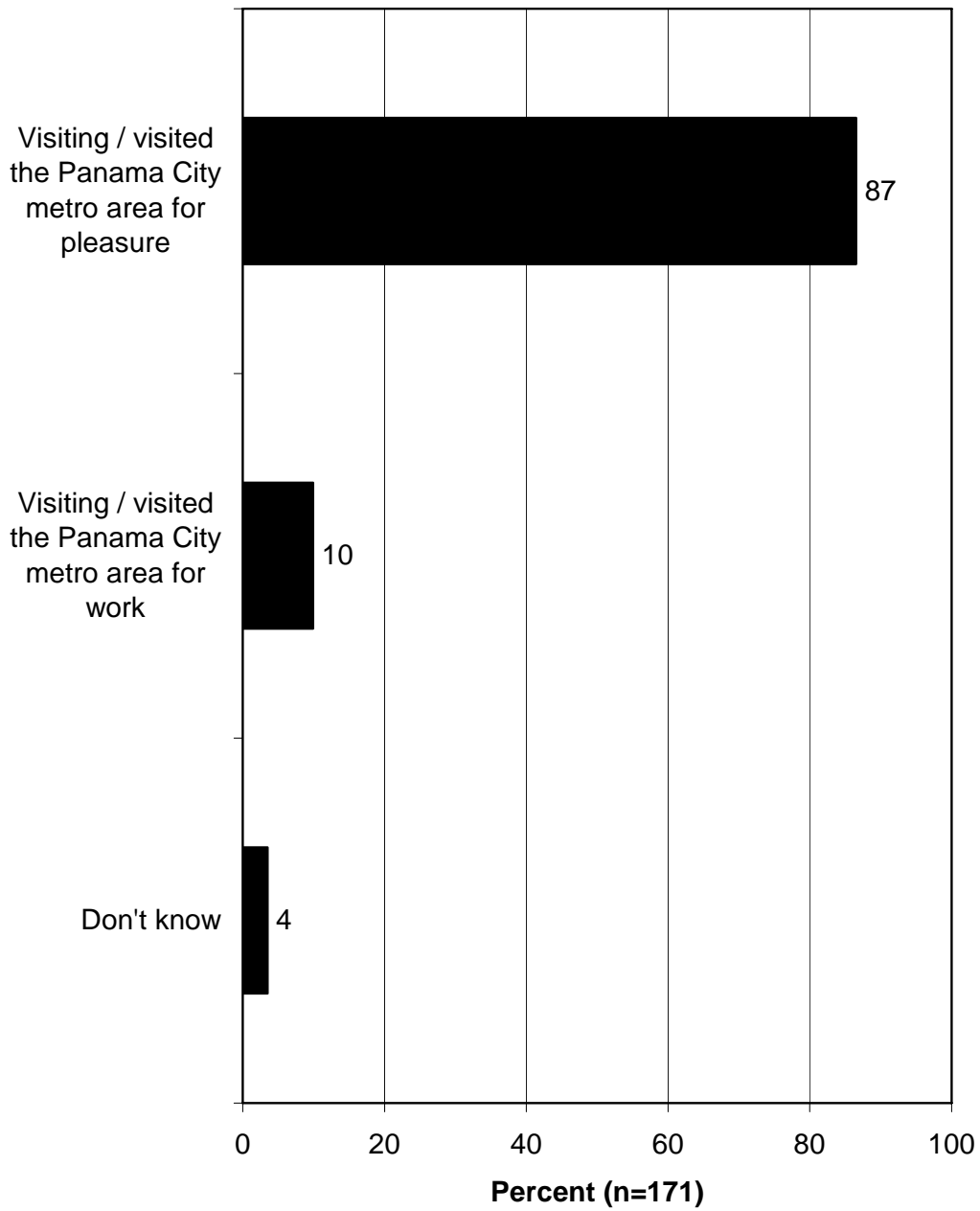
Q105/Q128. What wild dolphin-related activities did you do in these other areas? (Asked of those who have participated in wild dolphin-related activities anywhere other than in the Panama City area in the past 2 years.)



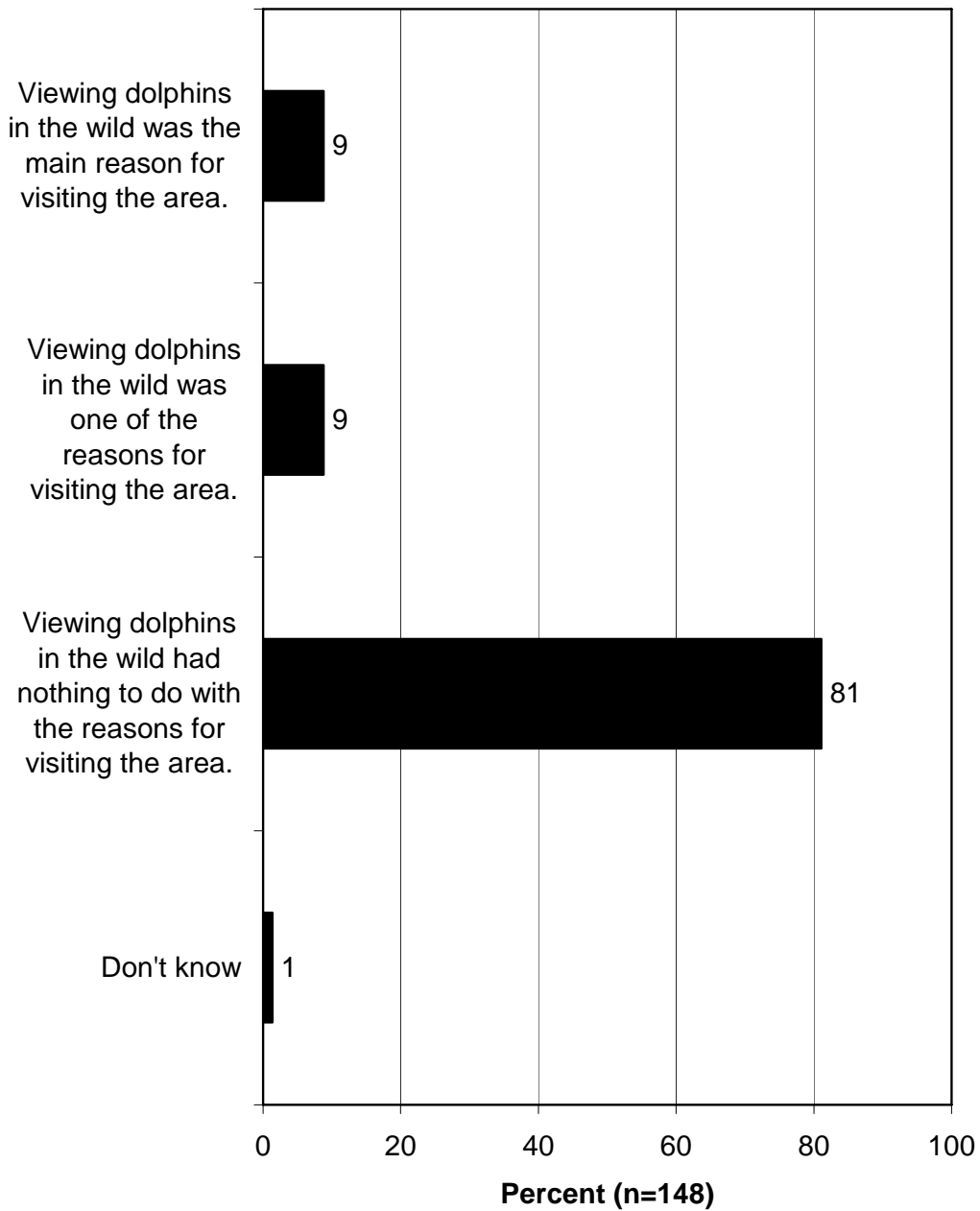
Q106/Q129. Where did you participate in dolphin-related activities other than in the Panama City area? (Asked of those who have participated in wild dolphin-related activities anywhere other than in the Panama City area in the past 2 years.)



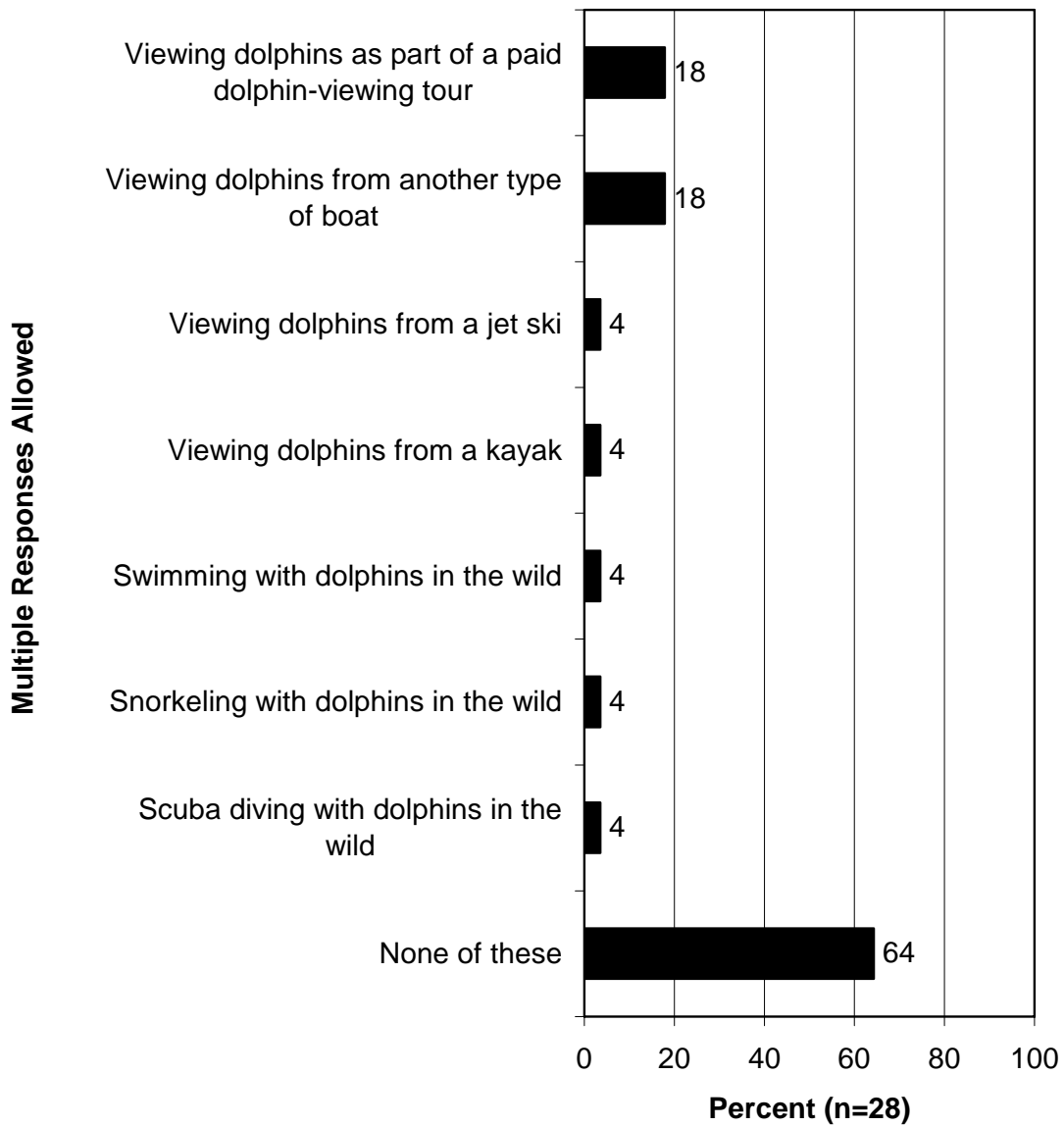
**Q94. Which best describes why you are / were in the Panama City area?
(Visitor survey)**



**Q95. Which best describes the reason you are visiting / visited the Panama City area? (Asked of those who visited the Panama City metro area for pleasure.)
(Visitor survey)**



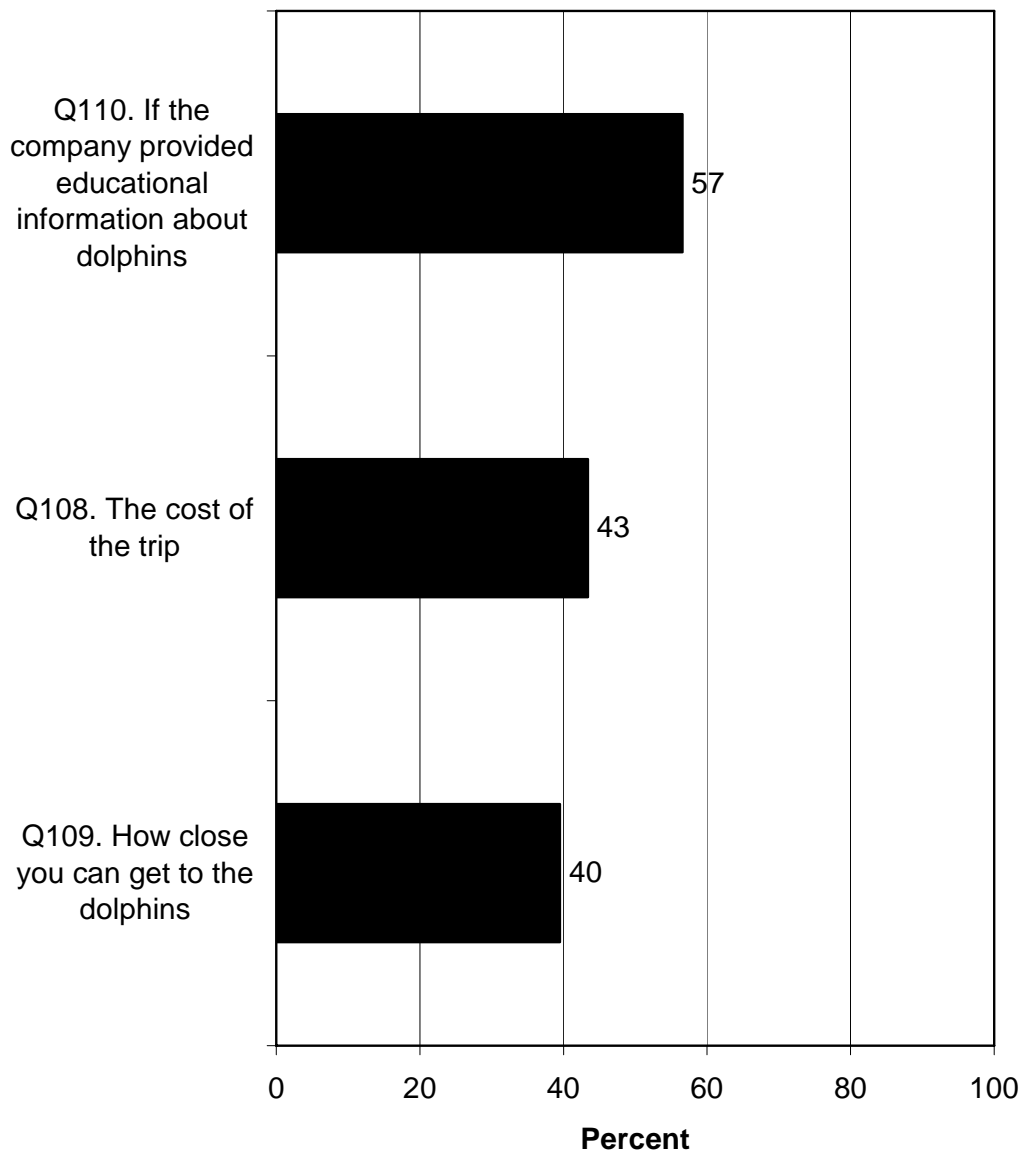
**Q98. Which of the following wild dolphin viewing activities have you done / will you do / did you do during your last trip to Panama City? (Asked of those who visited the Panama City metro area for pleasure, and viewing dolphins in the wild was the main reason or one of the reasons for visiting the area.)
(Visitor survey)**



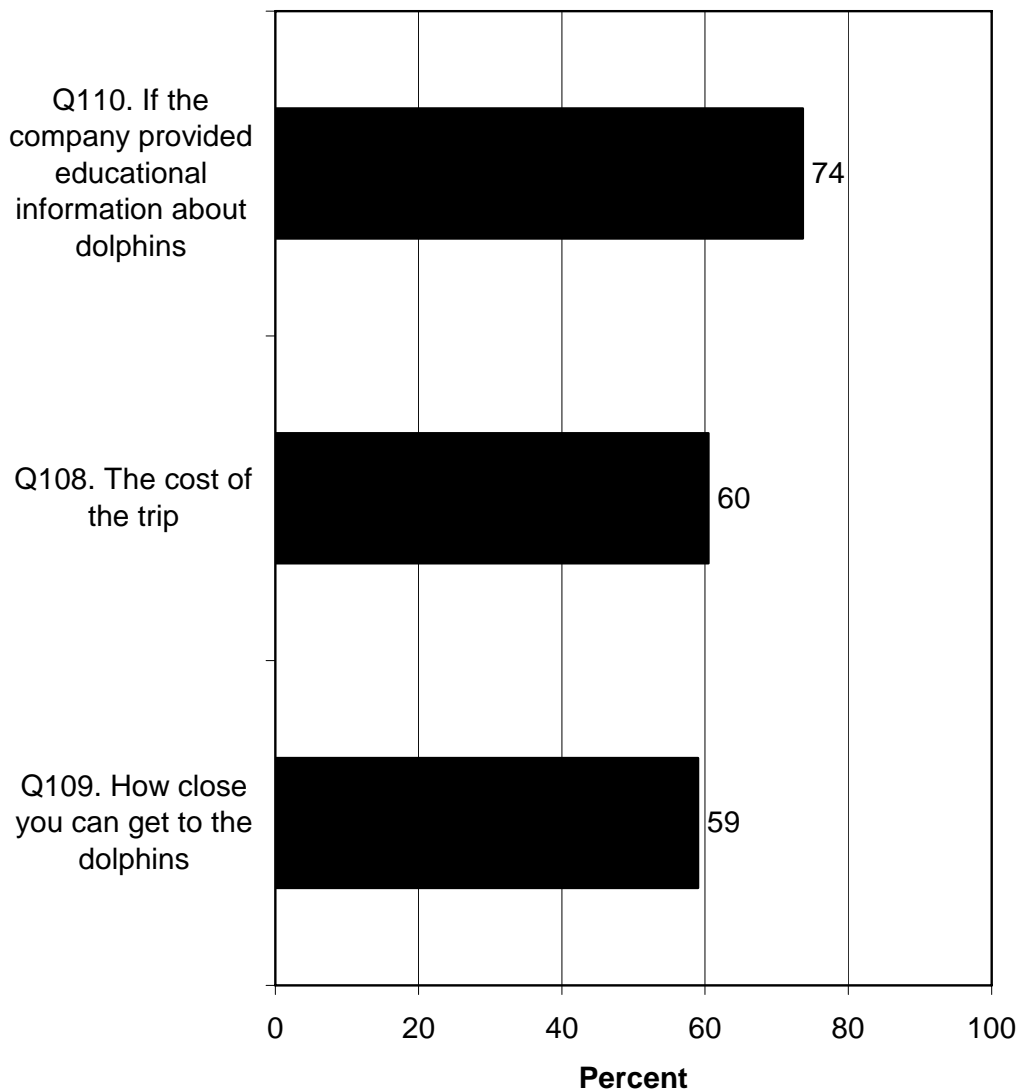
RESIDENTS' AND VISITORS' ATTITUDES TOWARD FACTORS INFLUENCING THEIR USE OF BUSINESSES THAT PRACTICE RESPONSIBLE DOLPHIN VIEWING

- The resident and visitor surveys asked respondents about three different factors that could potentially influence their decision to use either a company that practiced responsible dolphin viewing methods or a company that did not, if they were to go on a dolphin-viewing trip. Respondents were instructed to indicate whether each factor would be a *major* factor, a *minor* factor, or *not a factor at all*.
- Only one item was considered a *major* factor by a majority of both residents and visitors: if the company provided educational information about dolphins (57% of **residents** and 63% of **visitors** said this would be a *major* factor). The other factors—including the cost of the trip and how close customers would be able to get to the dolphins—were considered to be *major* factors by less than a majority of each respondent group. Thus, the availability of educational information about dolphins appears to outweigh the importance of both trip cost and proximity to dolphins when residents and visitors select a business for a dolphin viewing trip.

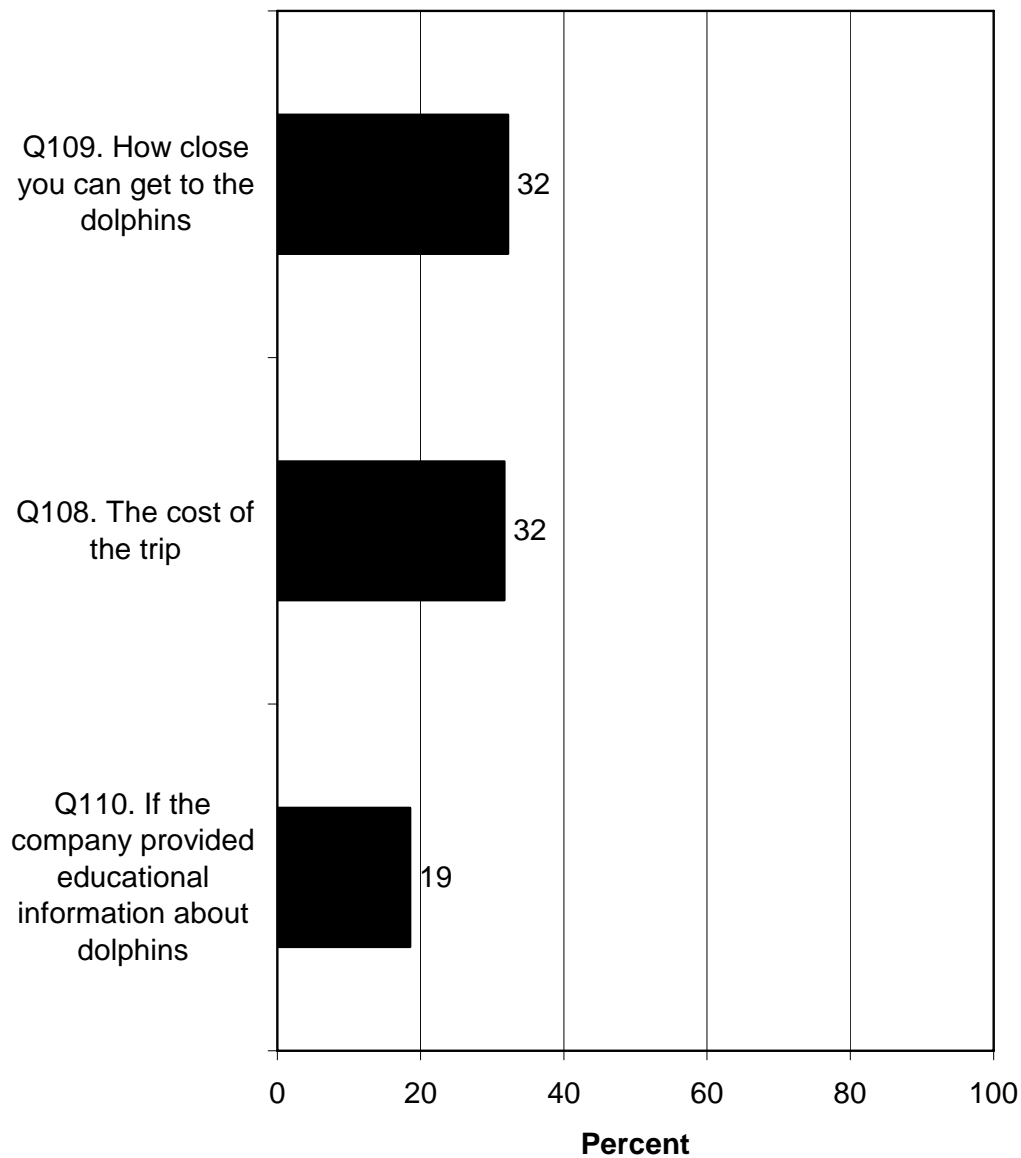
**Percent who indicated that the following would be a major factor in their decision to use either a company that practices responsible viewing methods or a company that practices irresponsible viewing methods, if they were to go on a dolphin viewing trip.
(Resident survey)**



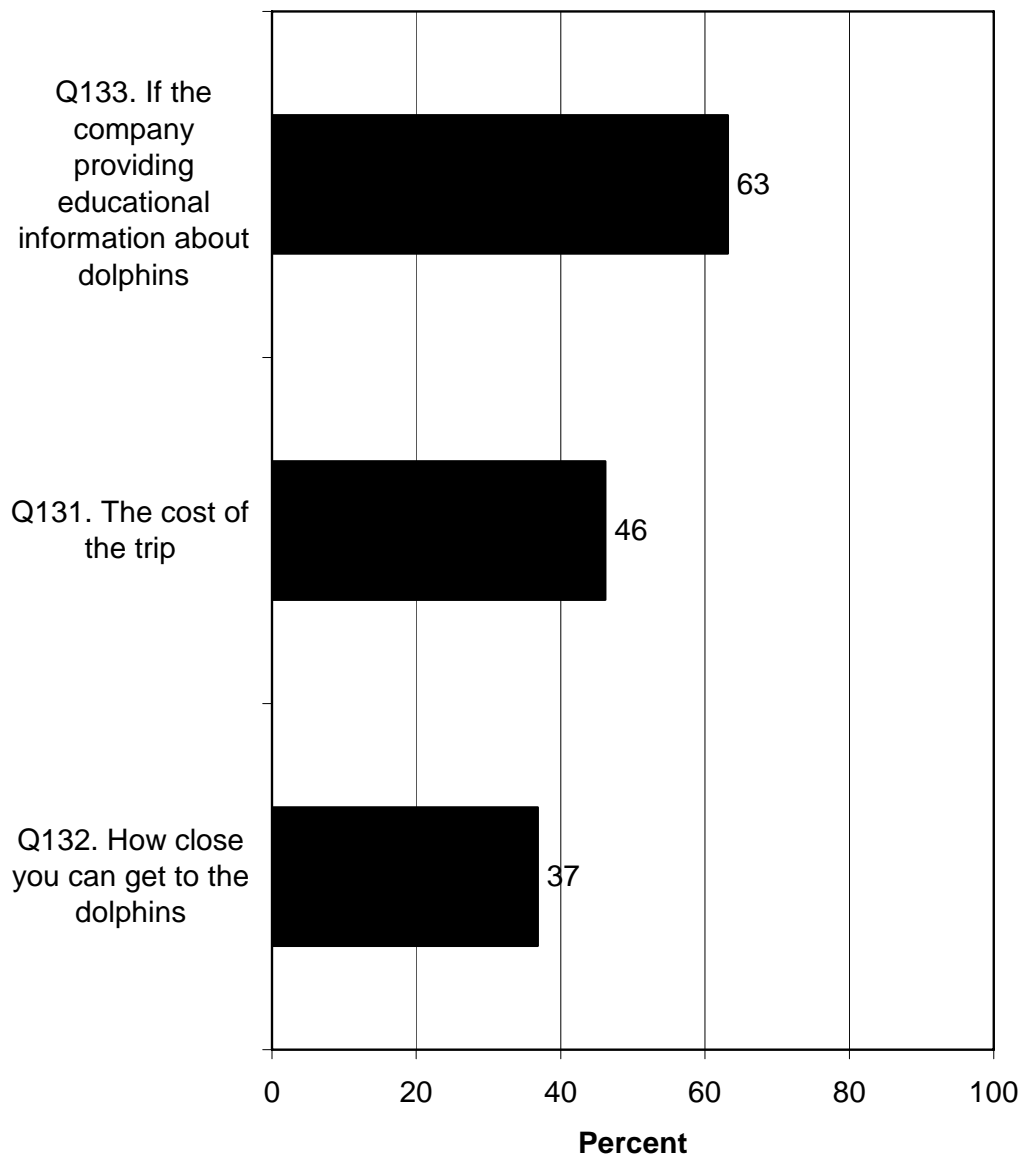
**Percent who indicated that the following would be a major or minor factor in their decision to use either a company that practices responsible viewing methods or a company that practices irresponsible viewing methods, if they were to go on a dolphin viewing trip.
(Resident survey)**



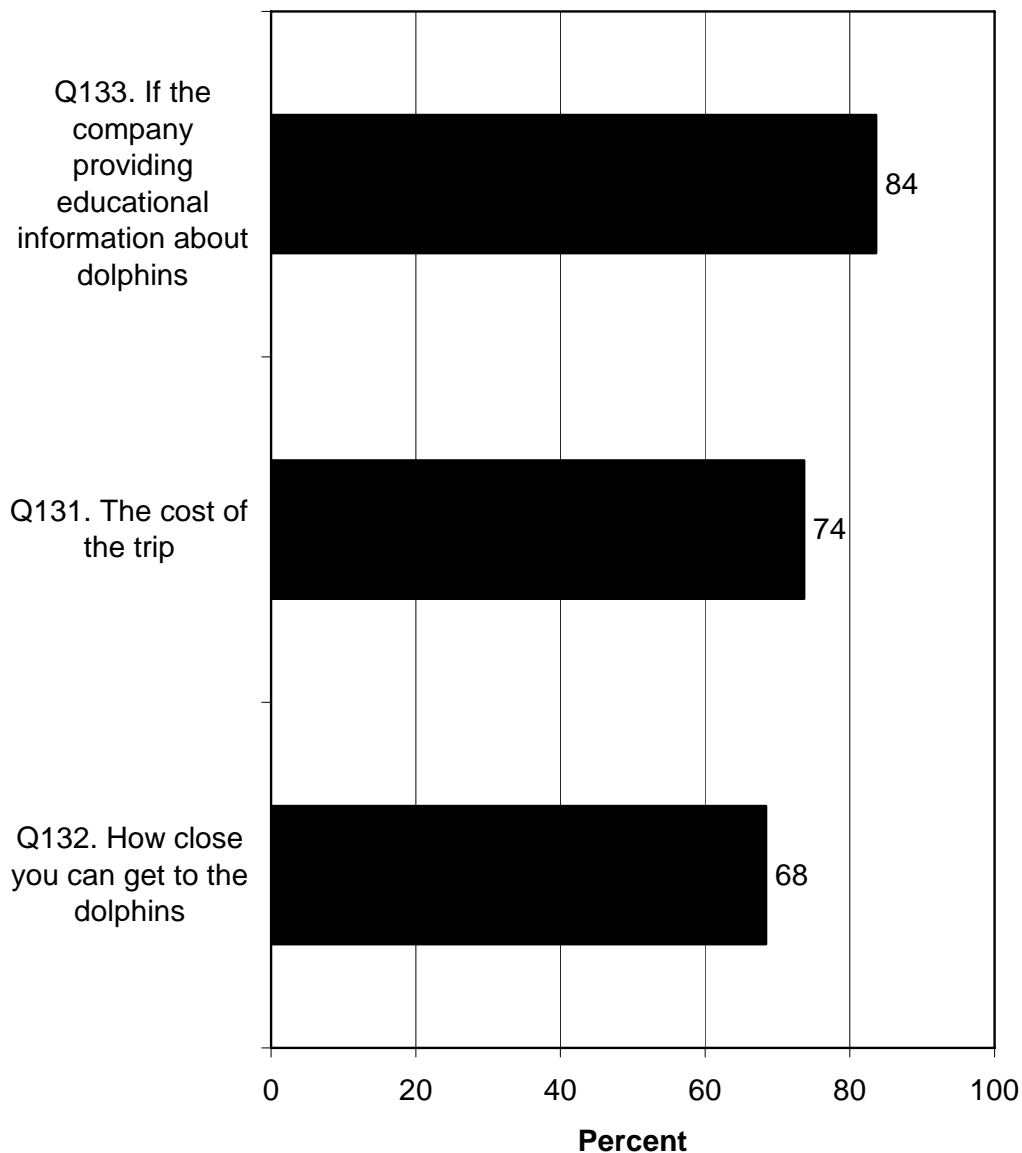
**Percent who indicated that the following would not be a factor at all in their decision to use either a company that practices responsible viewing methods or a company that practices irresponsible viewing methods, if they were to go on a dolphin viewing trip.
(Resident survey)**



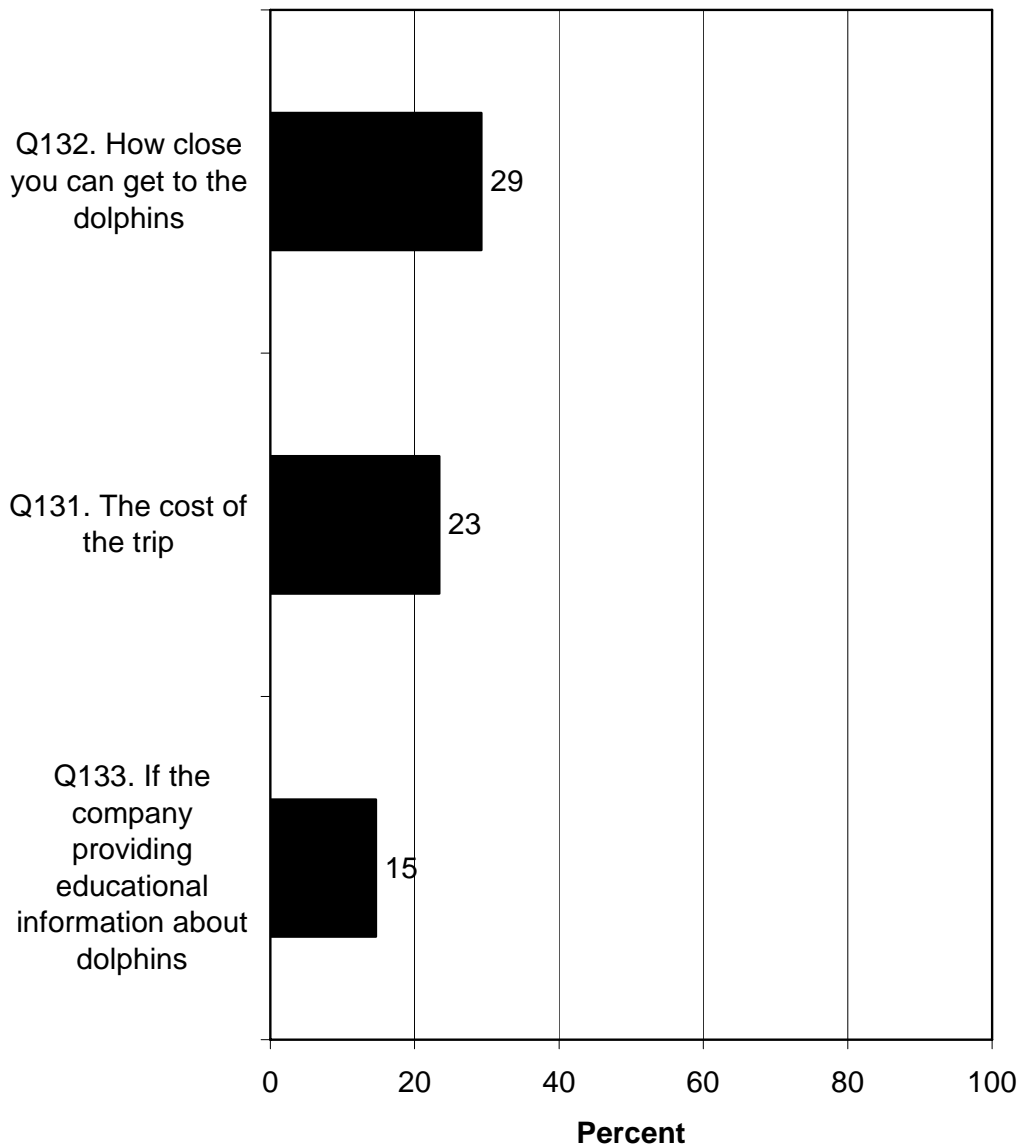
**Percent who indicated that the following would be a major factor in their decision to use either a company that practices responsible viewing methods or a company that practices irresponsible viewing methods, if they were to go on a dolphin viewing trip.
(Visitor survey)**



**Percent who indicated that the following would be a major or minor factor in their decision to use either a company that practices responsible viewing methods or a company that practices irresponsible viewing methods, if they were to go on a dolphin viewing trip.
(Visitor survey)**



**Percent who indicated that the following would not be a factor at all in their decision to use either a company that practices responsible viewing methods or a company that practices irresponsible viewing methods, if they were to go on a dolphin viewing trip.
(Visitor survey)**



Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major factor
INTEREST: Is very interested in feeding dolphins in the wild ($p \leq 0.05$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major or minor factor ($p \leq 0.001$).
ATTITUDE: Is very concerned about protecting wild dolphins ($p \leq 0.001$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major or minor factor ($p \leq 0.001$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major factor ($p \leq 0.001$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says cost would be a major or minor factor ($p \leq 0.01$).
KNOWLEDGE: Indicated that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is harmful (but may or may not have correctly indicated that it is also illegal) ($p \leq 0.01$).
KNOWLEDGE: Indicated that feeding dolphins in the wild is harmful (but may or may not have correctly indicated that it is also illegal) ($p < 0.05$).
KNOWLEDGE: Indicated that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is illegal and harmful ($p < 0.05$).
KNOWLEDGE: Indicated that feeding dolphins in the wild is illegal and harmful ($p \leq 0.05$).
INFORMATION: Got information about feeding dolphins from a public service announcement ($p \leq 0.001$).
INFORMATION: Got information about swimming with, touching, or petting dolphins from a public service announcement ($p \leq 0.05$).
DEMOGRAPHIC: Is female ($p \leq 0.05$).

See page 14, “Interpreting the Nonparametric Analysis Results,” for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

VISITOR SURVEY—ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major factor
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major or minor factor ($p \leq 0.001$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major or minor factor ($p \leq 0.001$).
ATTITUDE: Is very concerned about protecting wild dolphins ($p \leq 0.001$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major factor ($p \leq 0.001$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says cost would be a major or minor factor ($p \leq 0.01$).
DEMOGRAPHIC: Is a member of or has donated to a boating, fishing, recreation, or conservation organization ($p \leq 0.05$).
DEMOGRAPHIC: Is 55 years old or older ($p \leq 0.05$).

See page 14, “Interpreting the Nonparametric Analysis Results,” for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says cost would be a major factor
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says cost would be a major or minor factor ($p \leq 0.001$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major or minor factor ($p \leq 0.001$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major factor ($p \leq 0.001$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major or minor factor ($p \leq 0.01$).
DEMOGRAPHIC: Indicated being employed ($p \leq 0.05$).

See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

VISITOR SURVEY—ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says cost would be a major factor
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says cost would be a major or minor factor ($p \leq 0.001$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major or minor factor ($p \leq 0.001$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major or minor factor ($p \leq 0.01$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major factor ($p \leq 0.05$).
DEMOGRAPHIC: Is not a member of nor has donated to a boating, fishing, recreation, or conservation organization ($p \leq 0.01$).
DEMOGRAPHIC: Is younger than 55 years old ($p \leq 0.05$).
DEMOGRAPHIC: Is younger than 65 years old ($p \leq 0.05$).

See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major factor
PARTICIPATION: Has viewed dolphins as part of a paid wild dolphin viewing tour in the Panama City area in the past 2 years ($p \leq 0.05$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major or minor factor ($p \leq 0.001$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says cost would be a major or minor factor ($p \leq 0.001$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says cost would be a major factor ($p \leq 0.001$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major or minor factor ($p \leq 0.001$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major factor ($p \leq 0.001$).
DEMOGRAPHIC: Indicated being employed ($p \leq 0.01$).
DEMOGRAPHIC: Is younger than 55 years old ($p \leq 0.01$).
DEMOGRAPHIC: Is younger than 65 years old ($p \leq 0.05$).
DEMOGRAPHIC: Education level is no higher than associate's or trade school degree ($p \leq 0.05$).

See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

VISITOR SURVEY—ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major factor
INTEREST: Is very interested in feeding dolphins in the wild ($p \leq 0.05$).
INTEREST: Is very interested in closely interacting with dolphins in the wild ($p \leq 0.05$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major or minor factor ($p \leq 0.001$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major factor ($p \leq 0.001$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says cost would be a major or minor factor ($p \leq 0.01$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says cost would be a major factor ($p \leq 0.05$).
INFORMATION: Has heard or read something that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild ($p \leq 0.05$).
DEMOGRAPHIC: Is younger than 65 years old ($p \leq 0.05$).

See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

COMMERCIAL BUSINESS ATTITUDES TOWARD PUBLIC EDUCATION AND RESPONSIBLE DOLPHIN VIEWING

CURRENT PARTICIPATION IN PUBLIC EDUCATION

- Just over half of the commercial business operators surveyed (52%) inform guests how to view wild dolphins without disturbing them *all the time*, while more than three-quarters (78%) inform guests about this at least *some of the time*. Similarly, half of the business operators surveyed (51%) inform guests why it is important to not disturb dolphins in the wild when viewing them *all the time*, while 69% do so at least *some of the time*.
- The most common educational methods/materials used by commercial businesses include onboard educational commentary (28%) and educational brochures or pamphlets (19%). About a quarter of businesses (26%) do not provide any methods or materials.
 - The crosstabulations found that operators of water-related rentals (e.g., boats, jet skis, kayaks) and guided tours or excursions (e.g., diving, wildlife viewing, dolphin tours), compared to the other types of businesses, appear more likely to inform guests how to view dolphins without disturbing them *all of the time*, and more likely to inform guests why it is important to not disturb dolphins in the wild when viewing them *all of the time*.
 - Operators of businesses in operation for the median of 13 years or less, compared to businesses in operation for more than the median of 13 years, appear more likely to inform guests how to view dolphins without disturbing them *all of the time*, and more likely to inform guests why it is important to not disturb dolphins in the wild when viewing them *all of the time*.
 - Operators of non-vessel-based businesses, compared to operators of vessel-based businesses, appear more likely to say that they inform guests how to view dolphins without disturbing them *none of the time*.

WILLINGNESS TO PARTICIPATE IN EDUCATIONAL WORKSHOPS AND PUBLIC EDUCATION

- Almost half of the business operators surveyed (46%) are willing to participate in a one-time educational workshop on how to view wild dolphins without disturbing them if the workshop was *free of charge*. However, just 10% would be willing to participate if the workshop were

offered *at a low cost*. Meanwhile, 43% of business operators are not willing to participate in such a workshop.

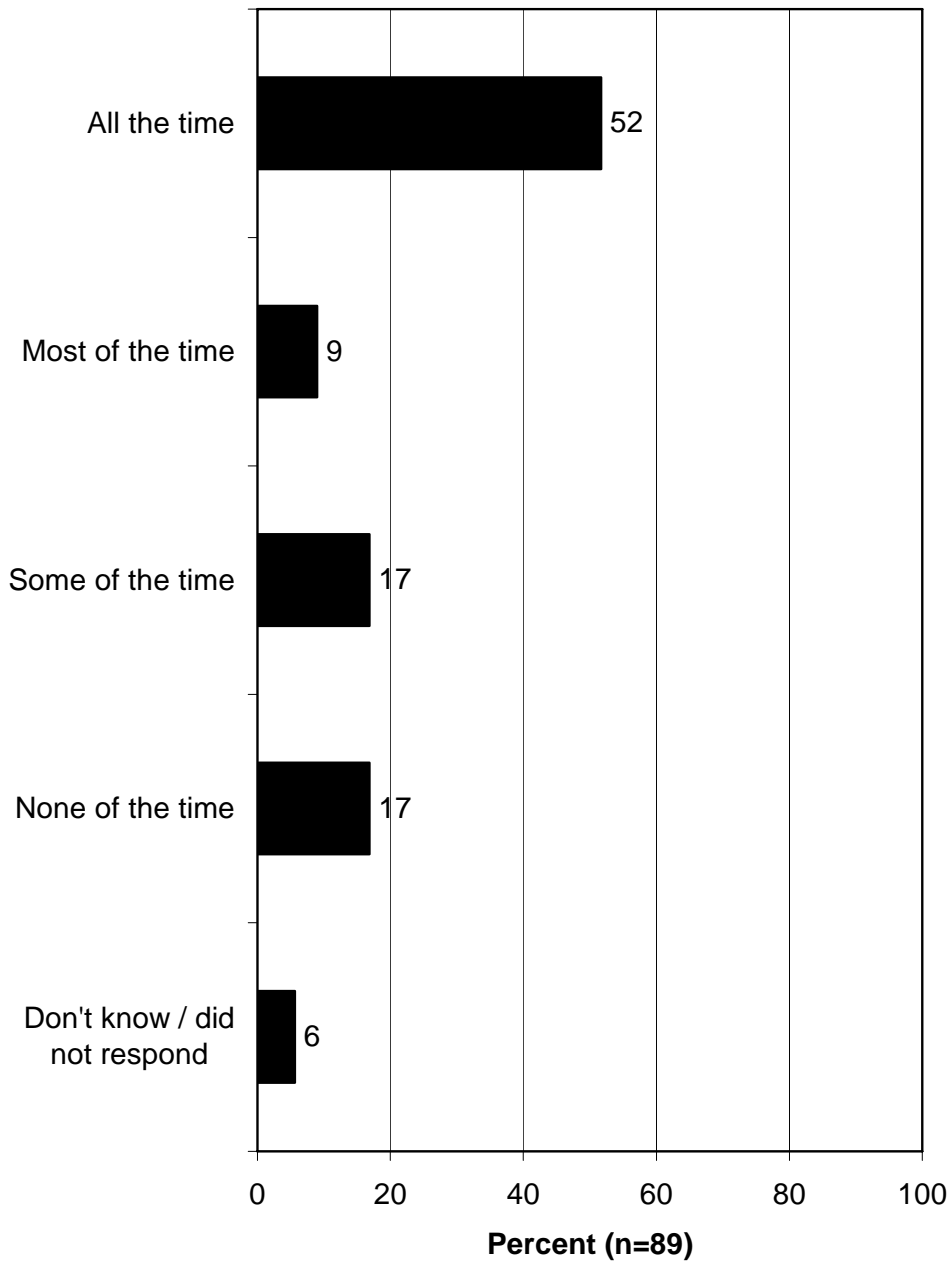
- Those who indicated being willing to participate in an educational workshop were asked what they thought would be a reasonable cost for a half-day workshop, and the median dollar amount response was \$45.
 - The crosstabulations found that operators of guided tours or excursions (e.g., diving, wildlife viewing, dolphin tours), compared to the other types of businesses, appear more likely to be willing to participate in a one-time educational workshop on how to view wild dolphins without disturbing them.
- A majority of the business operators surveyed (58%) said they would be willing to provide, display, or play pre-recorded educational materials to guests if provided with such materials free of charge.
 - Those willing to provide, display, or play such educational materials were asked which types they would be willing to distribute to the public, and the top answers include educational brochures or pamphlets (81%), signs (58%), stickers/vessel decals (56%), and posters (46%). Smaller percentages indicated being willing to provide fact sheets (31%), scientific articles (31%), Internet materials (27%), audio-visual public service announcements (23%), and podcasts (15%).

ATTITUDES TOWARD AND WILLINGNESS TO PARTICIPATE IN RESPONSIBLE VIEWING AND ADVERTISING

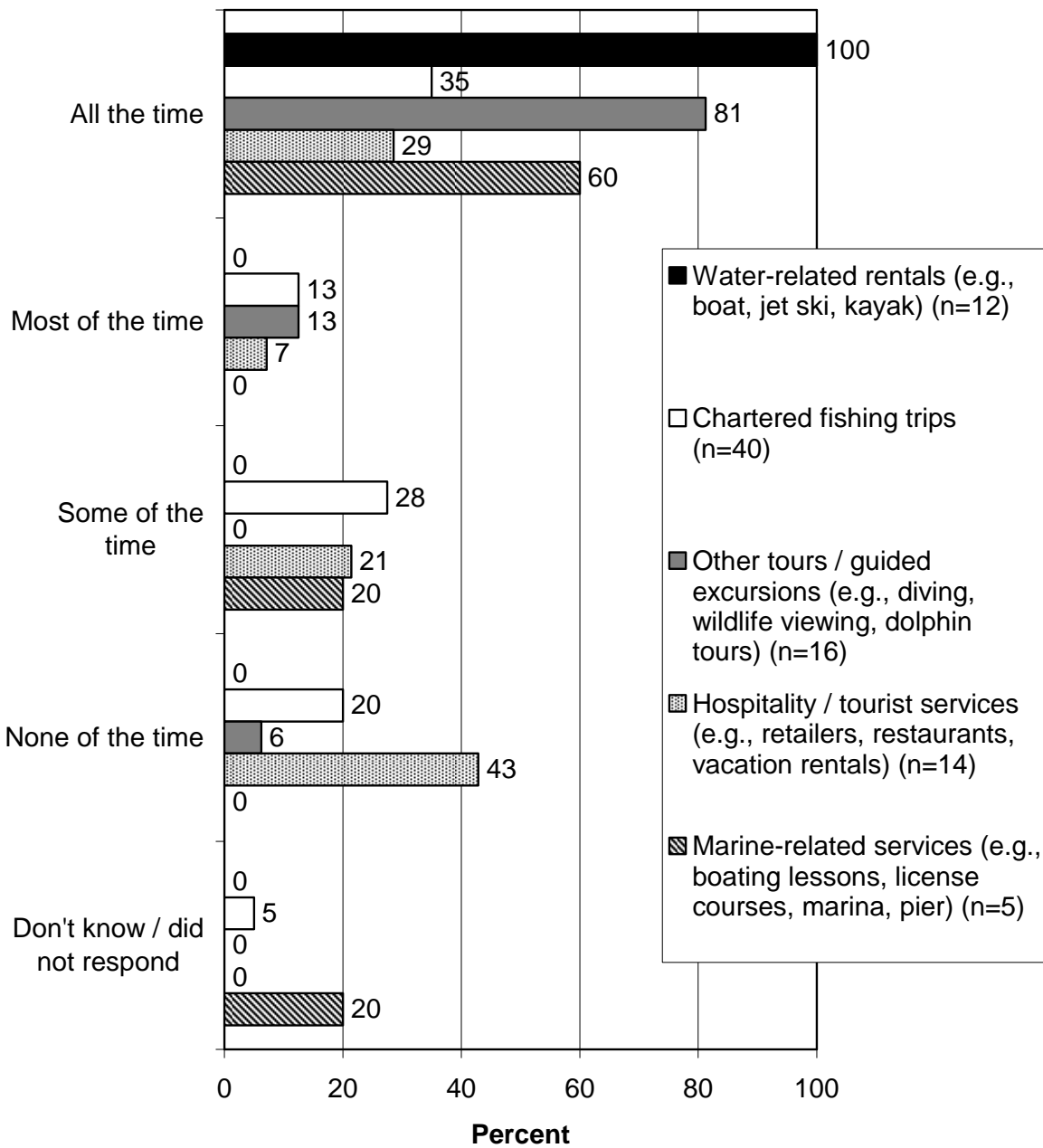
- When asked about a hypothetical incentive program for businesses that voluntarily help to enhance dolphin conservation by promoting responsible viewing and advertising and providing guests with educational materials, business operators most commonly say that such a program would be *extremely* (38%) or *moderately* (25%) valuable. In total, 78% of business operators think that such a program would be at least *a little* valuable.
 - The crosstabulations found that operators of guided tours or excursions (e.g., diving, wildlife viewing, dolphin tours), compared to the other types of businesses, appear more likely to view the hypothetical responsible viewing incentive program as *extremely* valuable.

- Operators of businesses that have been in operation for the median of 13 years or less, compared to operators of older businesses, appear more likely to view the hypothetical responsible viewing incentive program as *extremely* valuable.
 - Operators of non-vessel-based businesses, compared to operators of vessel-based businesses, appear more likely to view the hypothetical responsible viewing incentive program as *extremely* valuable.
- Business operators were asked to rate as *very*, *somewhat*, *a little*, or *not at all* important three factors potentially influencing their decision to take part in such a program: if the program had a low cost to participate, whether or not they personally saw the value in responsible viewing techniques, and if the program might cause them to lose business. Of these, the only factor to be rated as *very* important by a majority of the business operators surveyed was if the program might cause them to lose business (52% of business operators describe this as a *very* important factor). The two other factors—whether or not the business operator saw the value in responsible viewing techniques and if the program had a low cost to participate—were rated as *very* important factors by 42% and 30% of the business operator sample, respectively.
- The crosstabulations found that operators of businesses that have been in operation for the median of 13 years or less, compared to operators of older businesses, appear more likely to consider each of the three factors to be *very* important factors (that the program might cause them to lose business, whether or not they personally saw the value in responsible viewing techniques, and if the program had a low cost to participate).
 - Operators of vessel-based businesses, compared to operators of non-vessel-based businesses, appear more likely to consider if the program might cause them to lose business as a *very* important factor, and *less* likely to consider if the program had a low cost to participate as a *very* important factor potentially influencing their decision to take part in such a program.

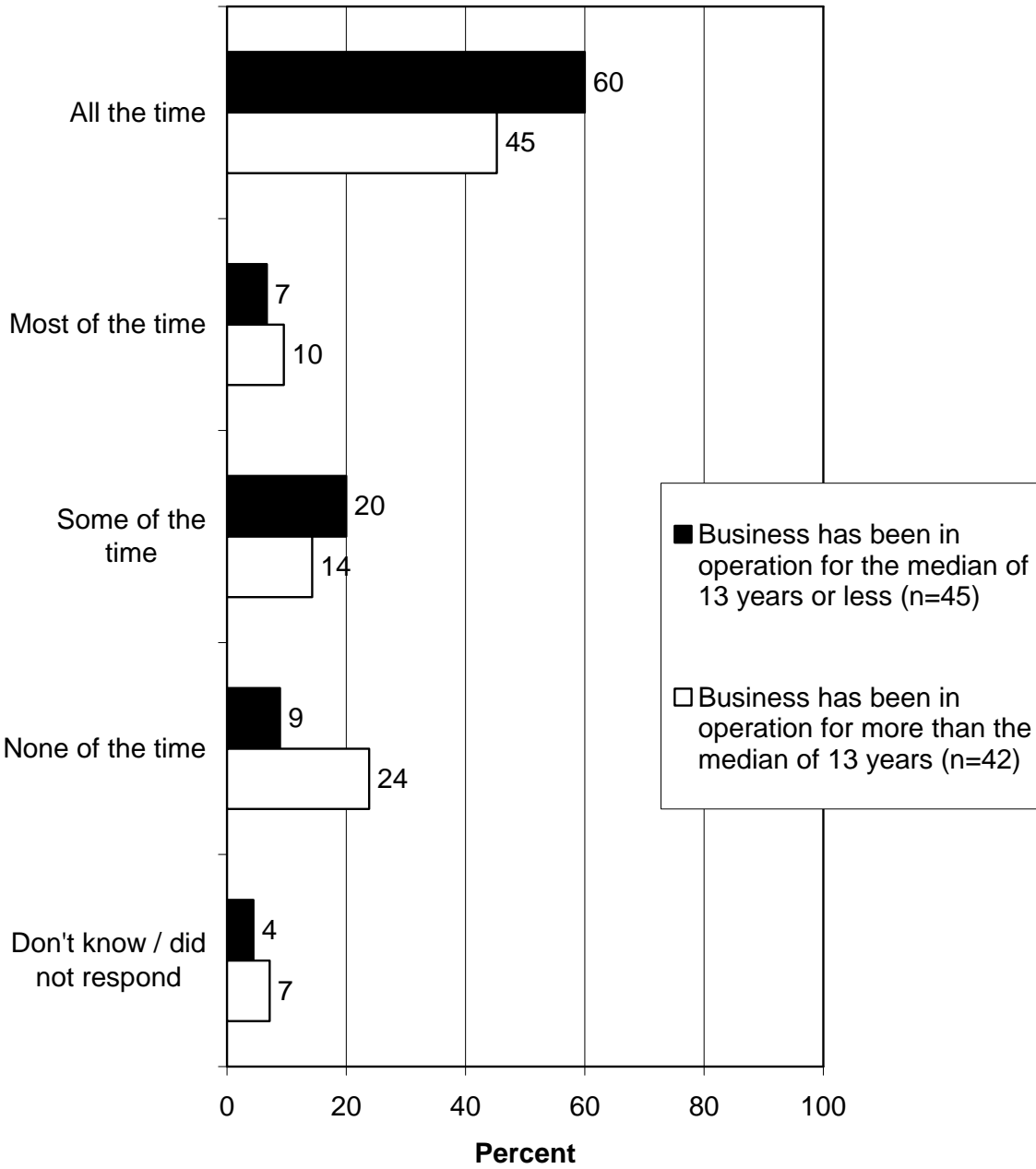
**Q27. How often does your business inform guests
how to view wild dolphins without disturbing
them?
(Business survey)**



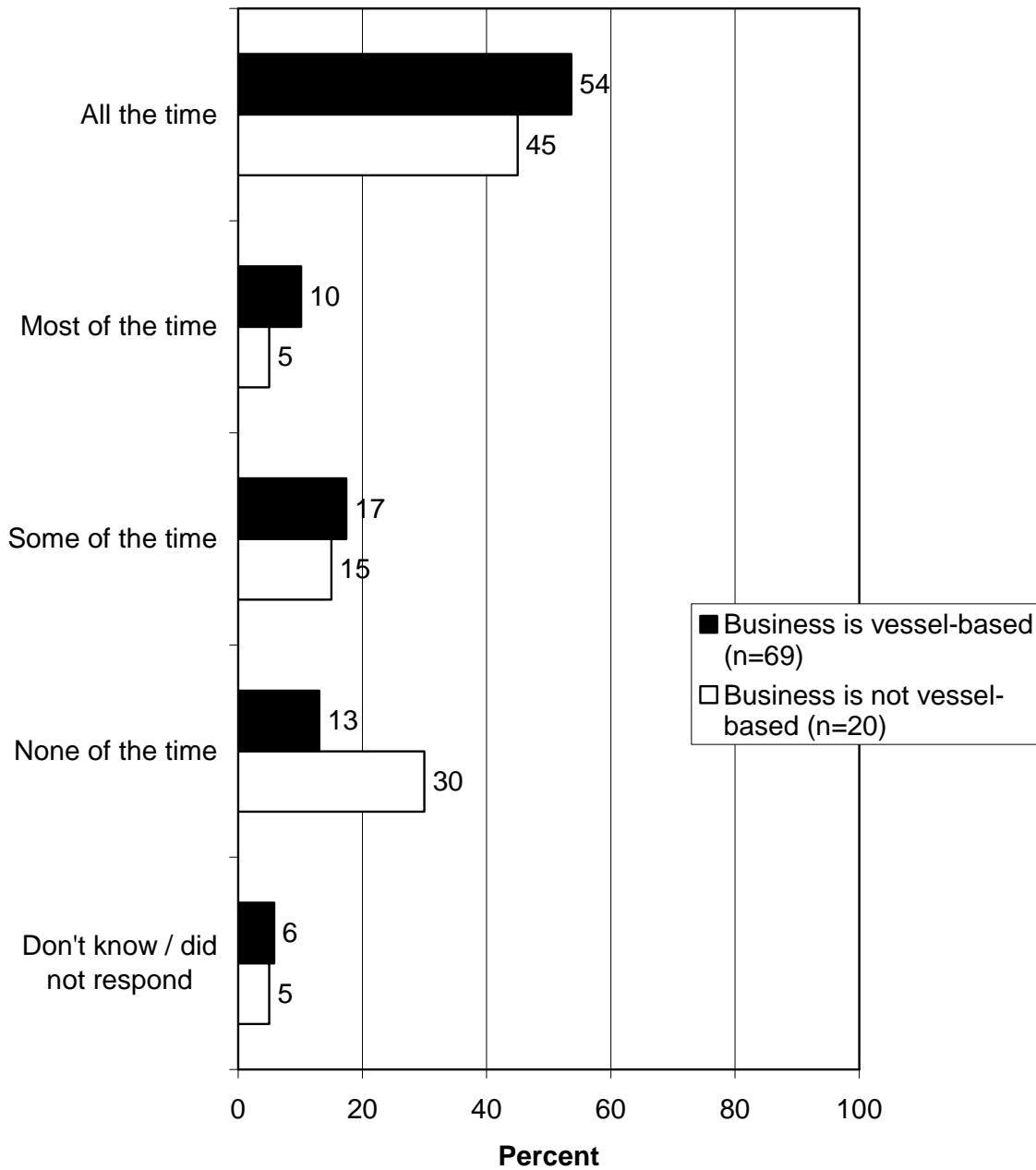
**Q27. How often does your business inform guests how to view wild dolphins without disturbing them?
(Business survey)**



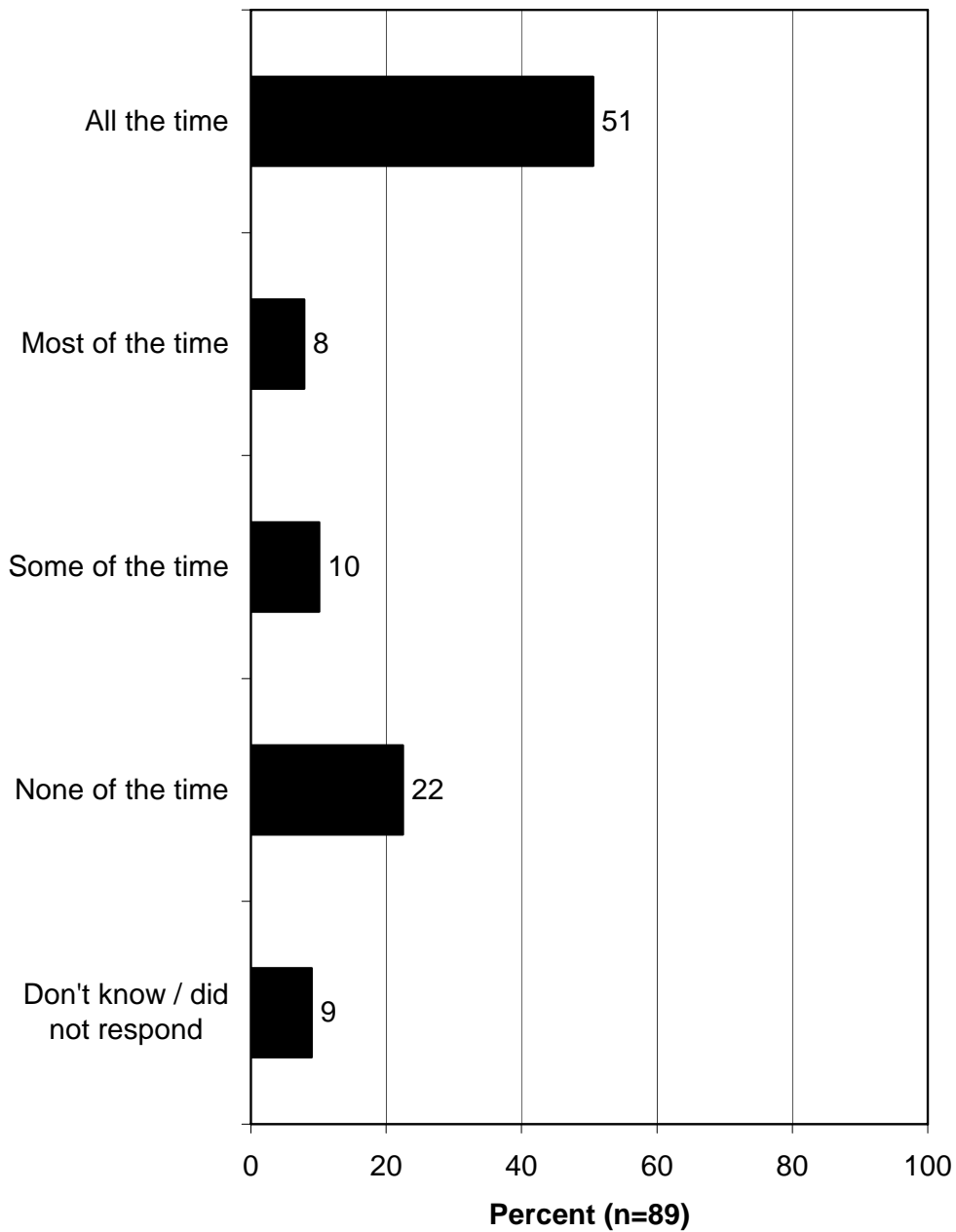
**Q27. How often does your business inform guests how to view wild dolphins without disturbing them?
(Business survey)**



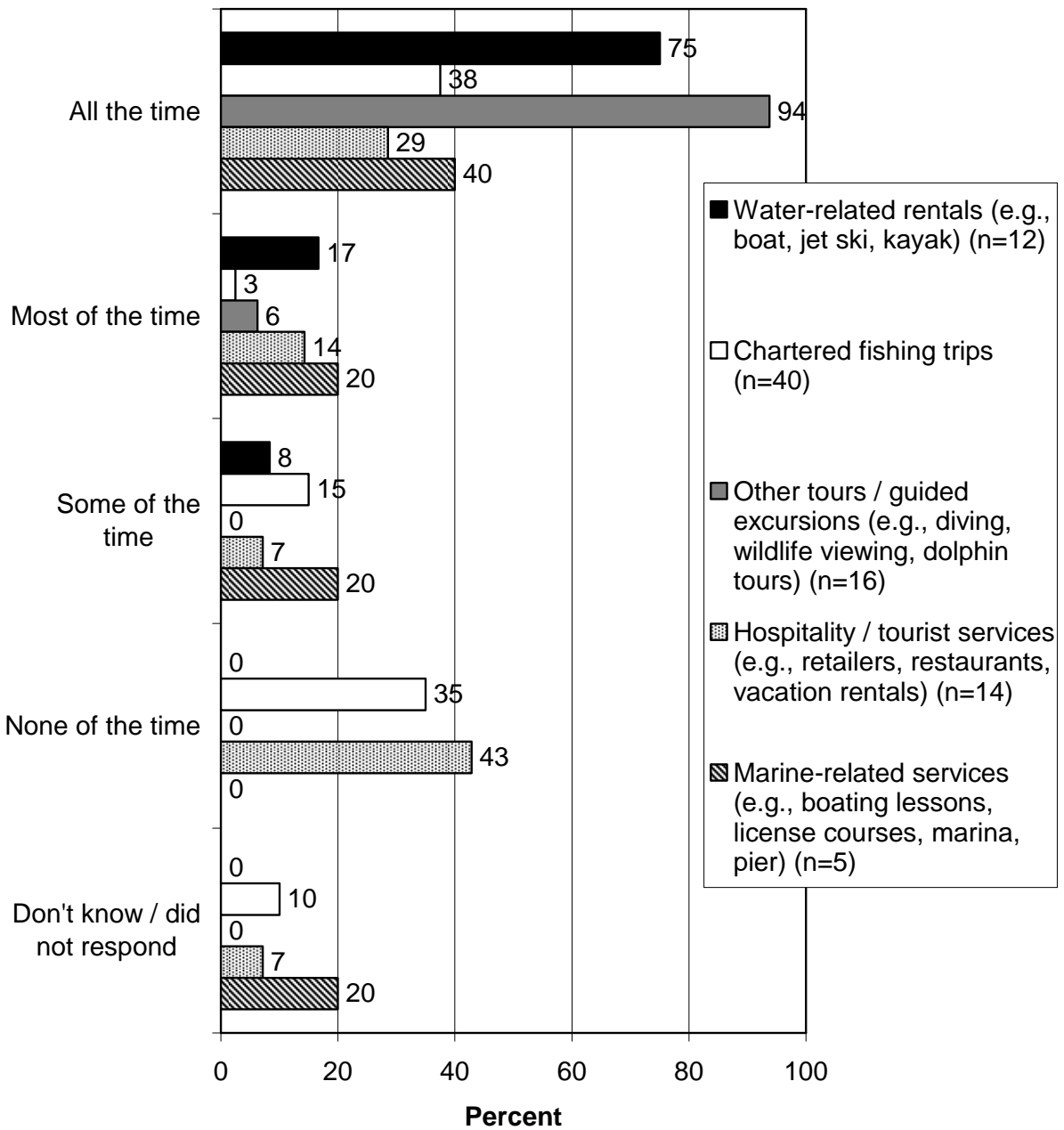
**Q27. How often does your business inform guests
how to view wild dolphins without disturbing
them?
(Business survey)**



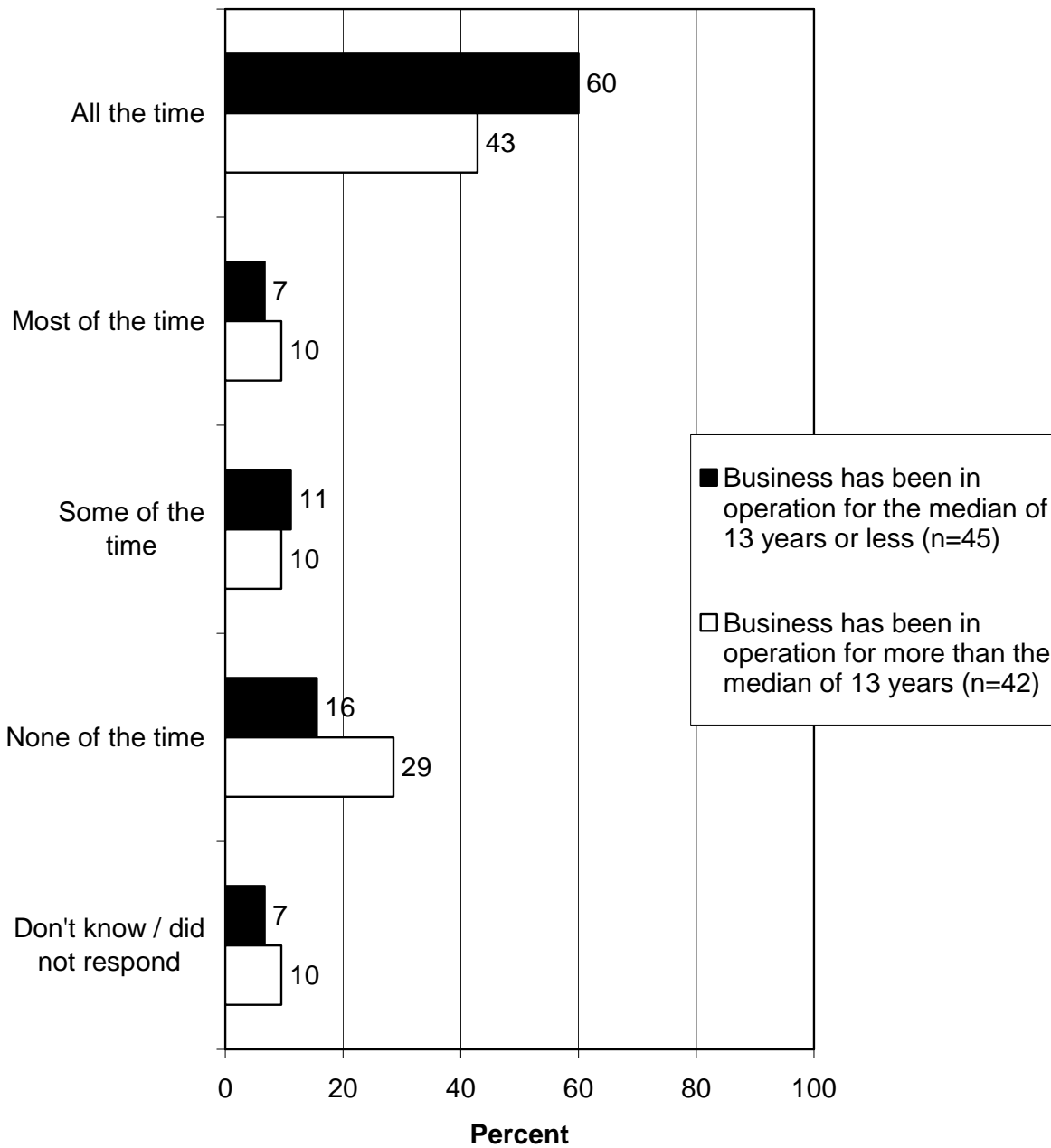
**Q28. How often does your business inform guests why it is important to not disturb dolphins in the wild when viewing them?
(Business survey)**



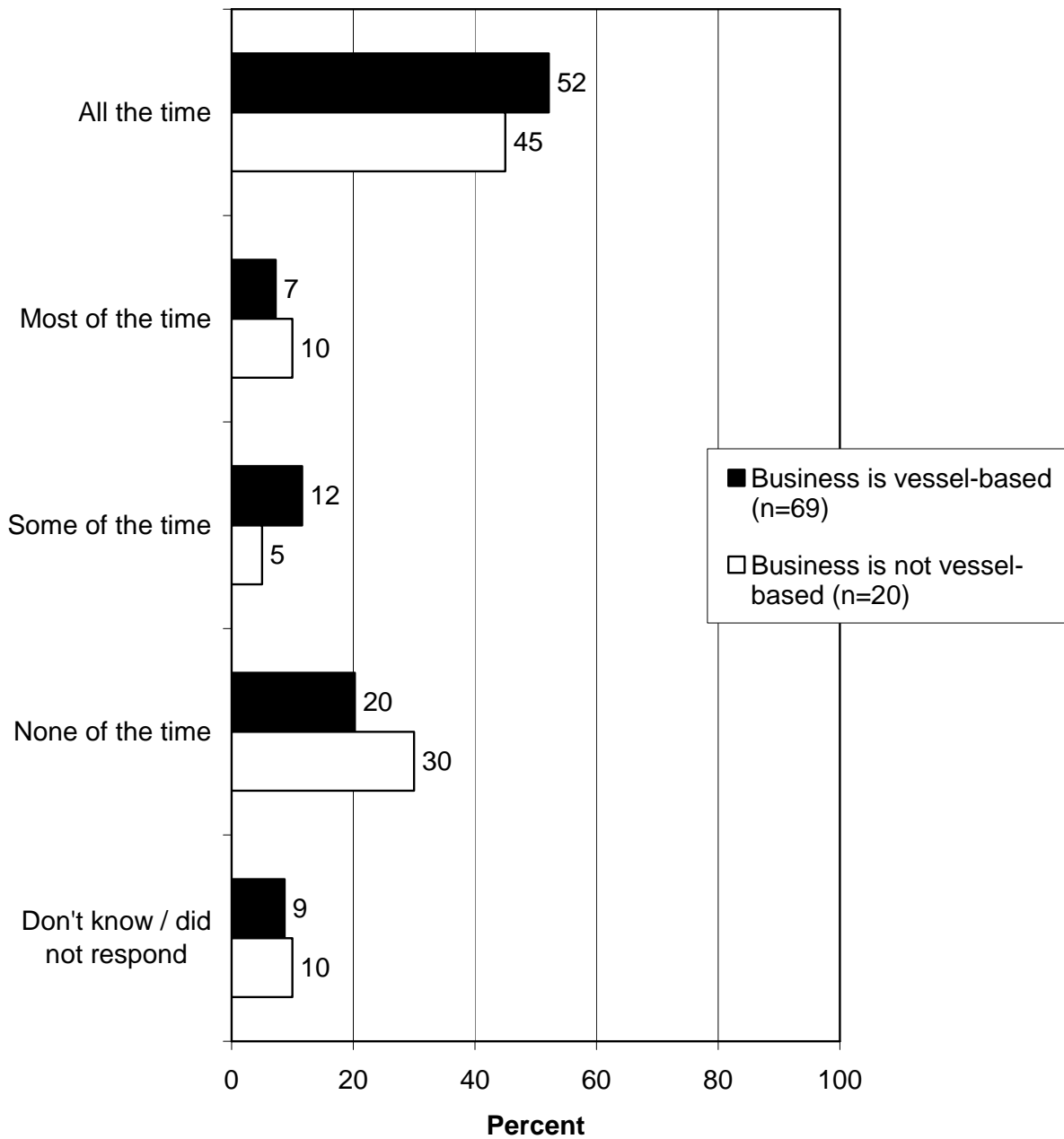
**Q28. How often does your business inform guests why it is important to not disturb dolphins in the wild when viewing them?
(Business survey)**



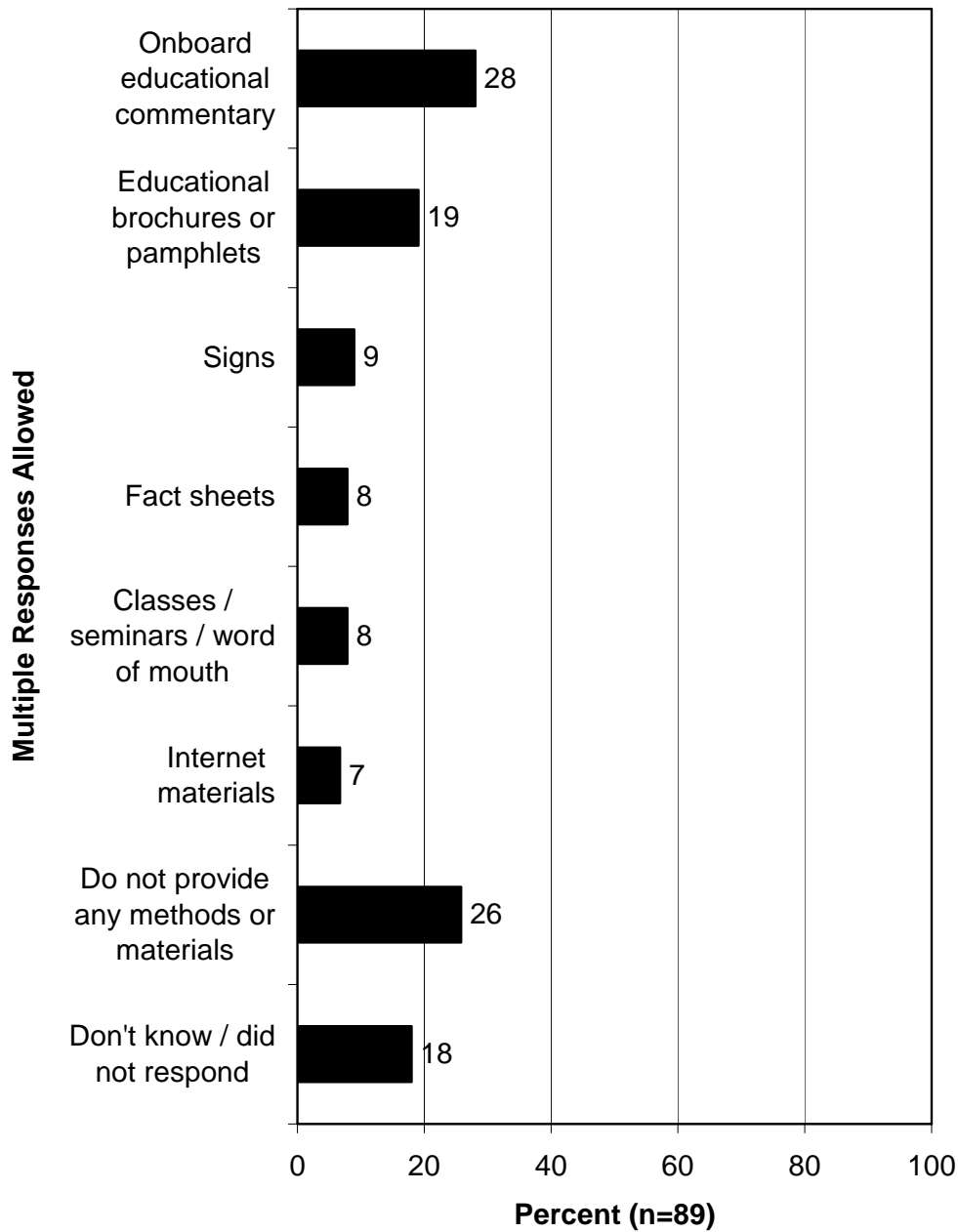
**Q28. How often does your business inform guests why it is important to not disturb dolphins in the wild when viewing them?
(Business survey)**



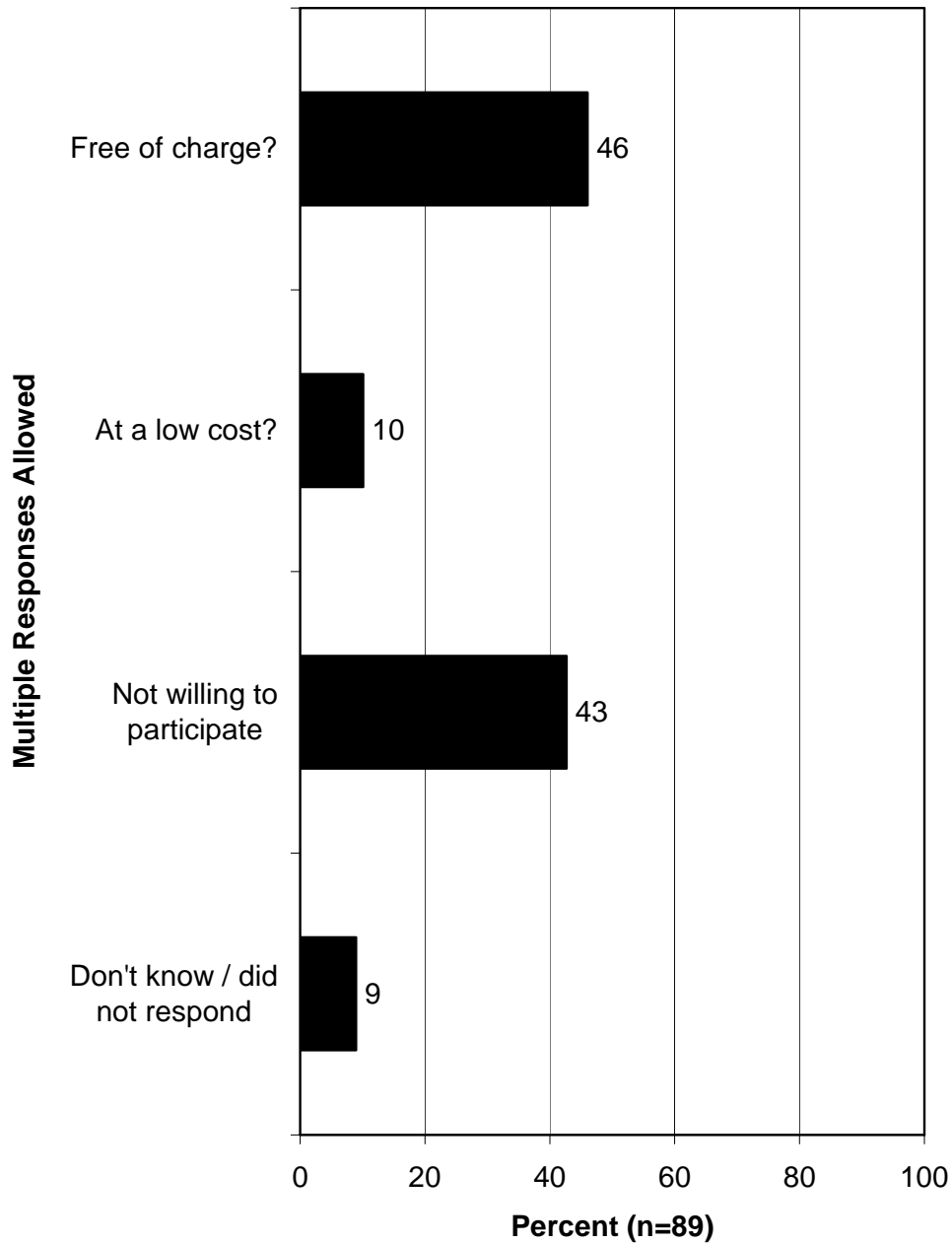
**Q28. How often does your business inform guests why it is important to not disturb dolphins in the wild when viewing them?
(Business survey)**



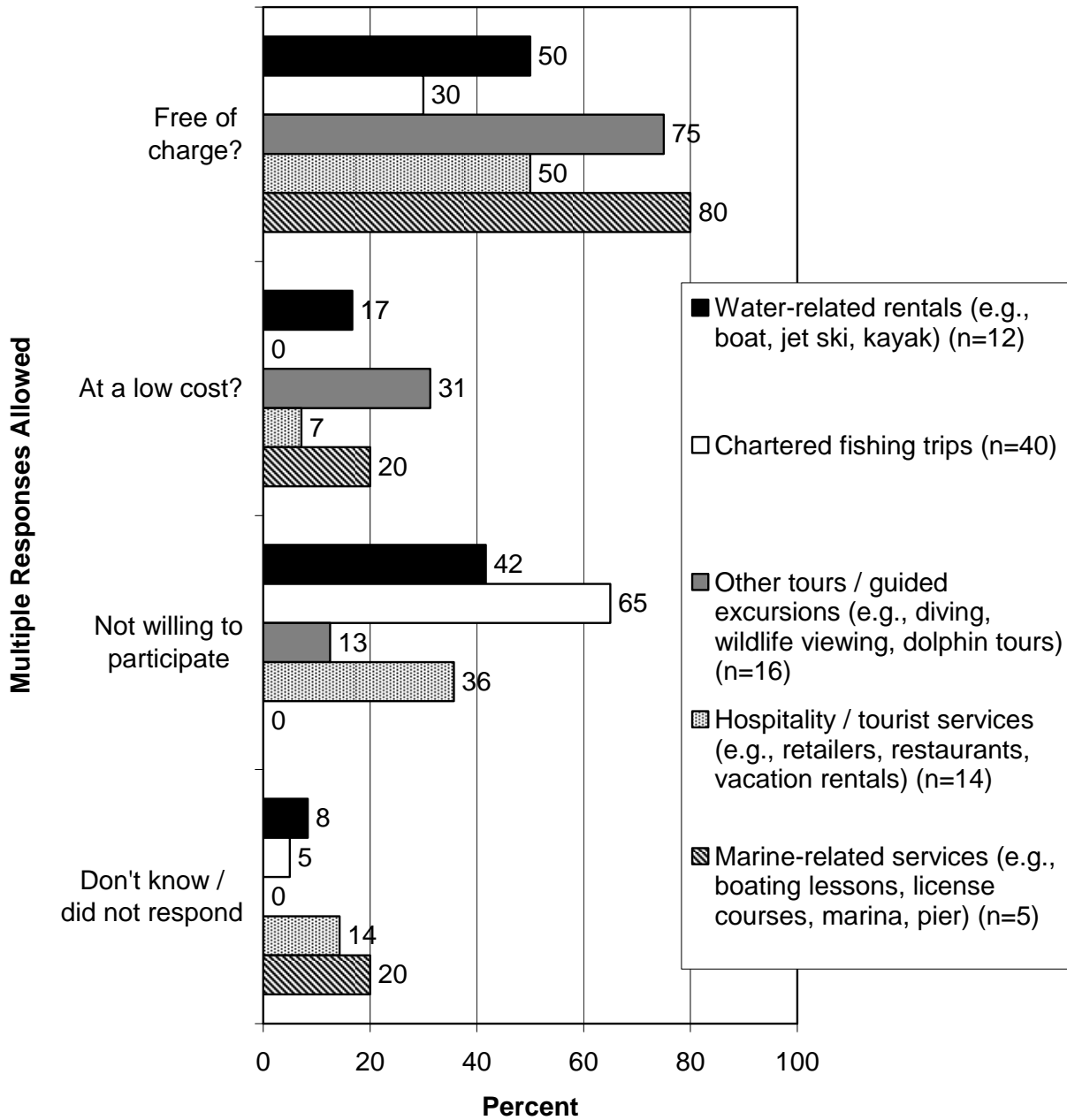
**Q29. What educational methods and/or materials do you provide to guests about dolphins?
(Business survey)**



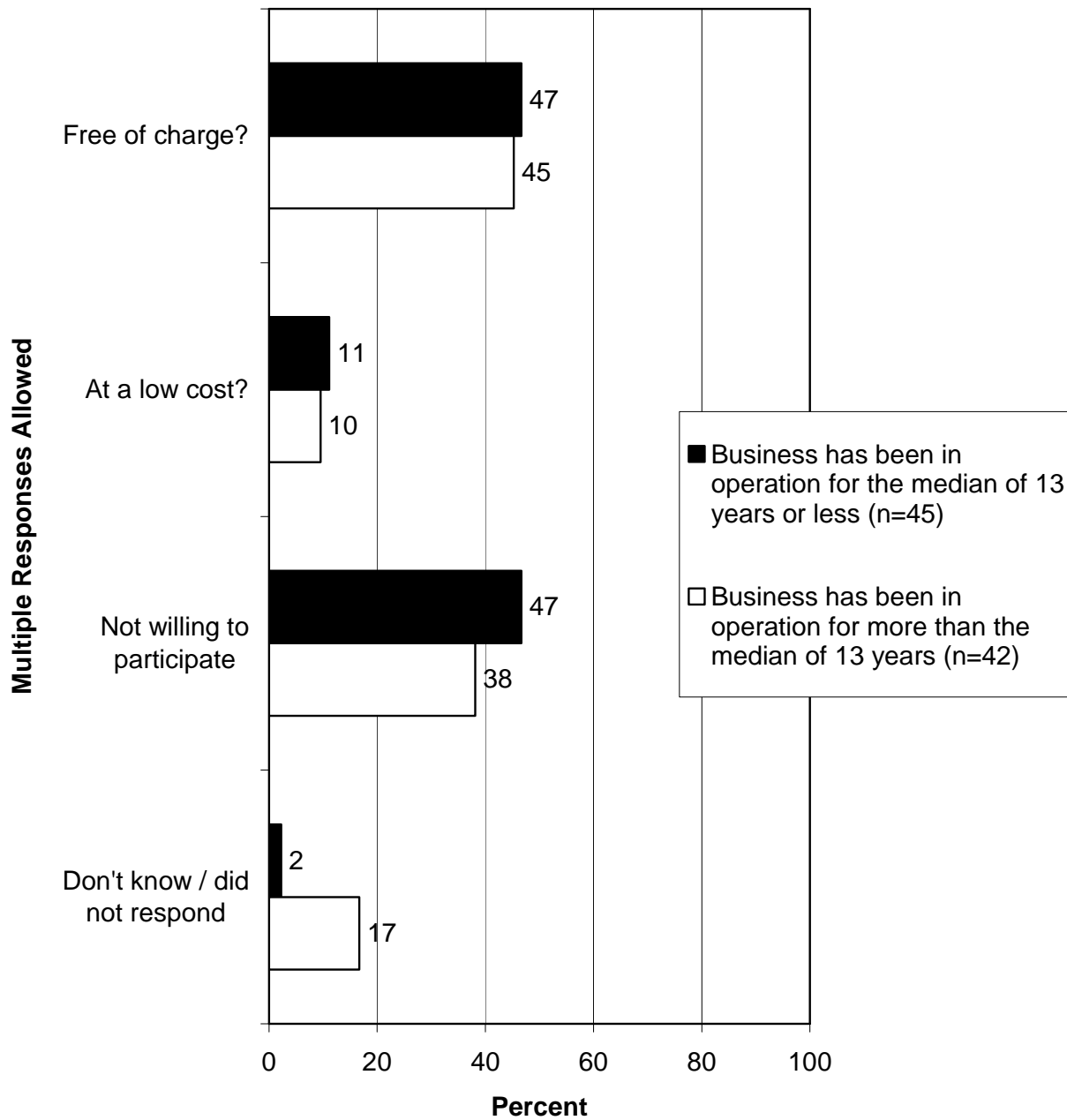
**Q30. Would you be willing to participate in a one-time educational workshop on how to view wild dolphins without disturbing them...?
(Business survey)**



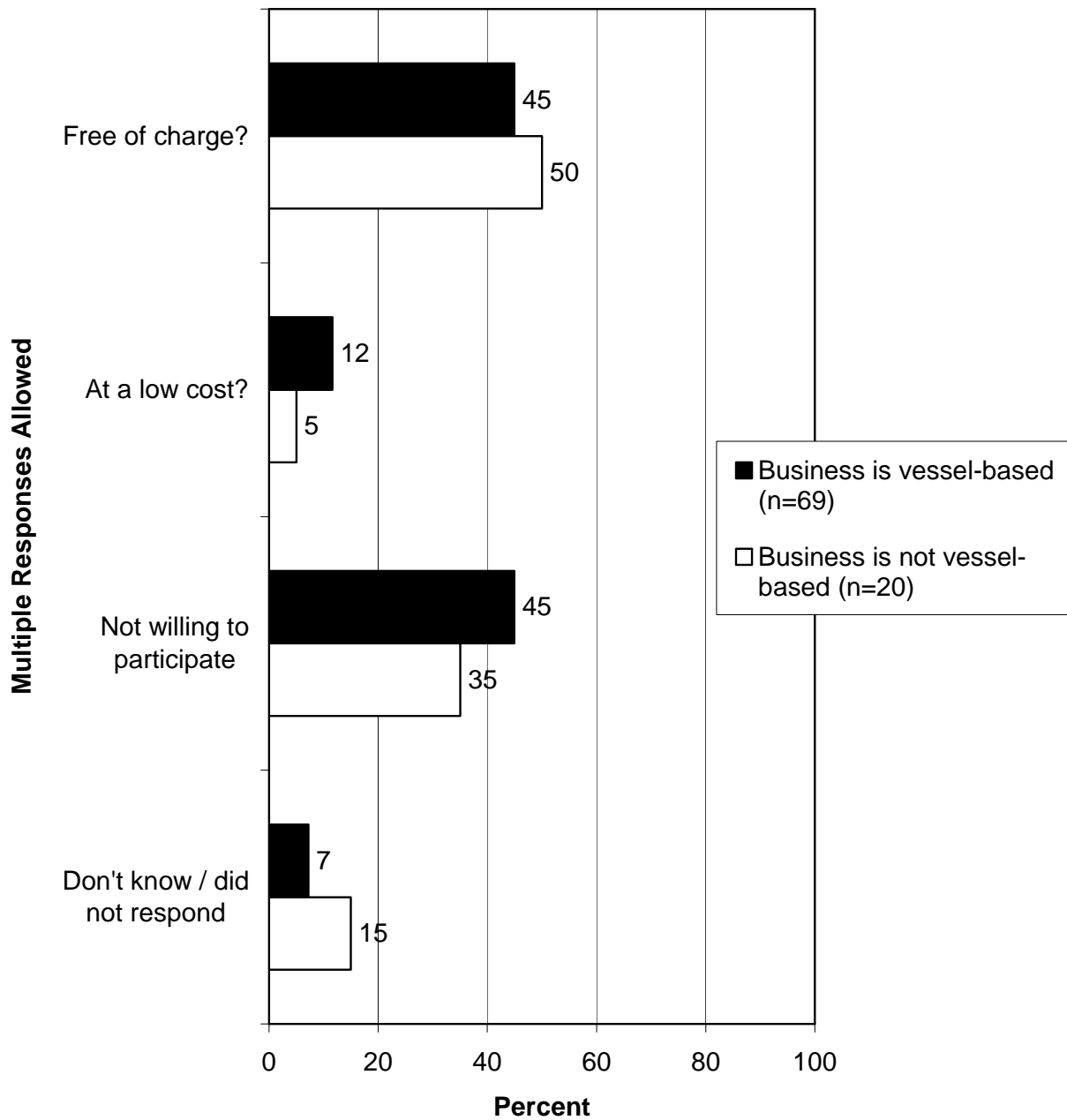
**Q30. Would you be willing to participate in a one-time educational workshop on how to view wild dolphins without disturbing them...?
(Business survey)**



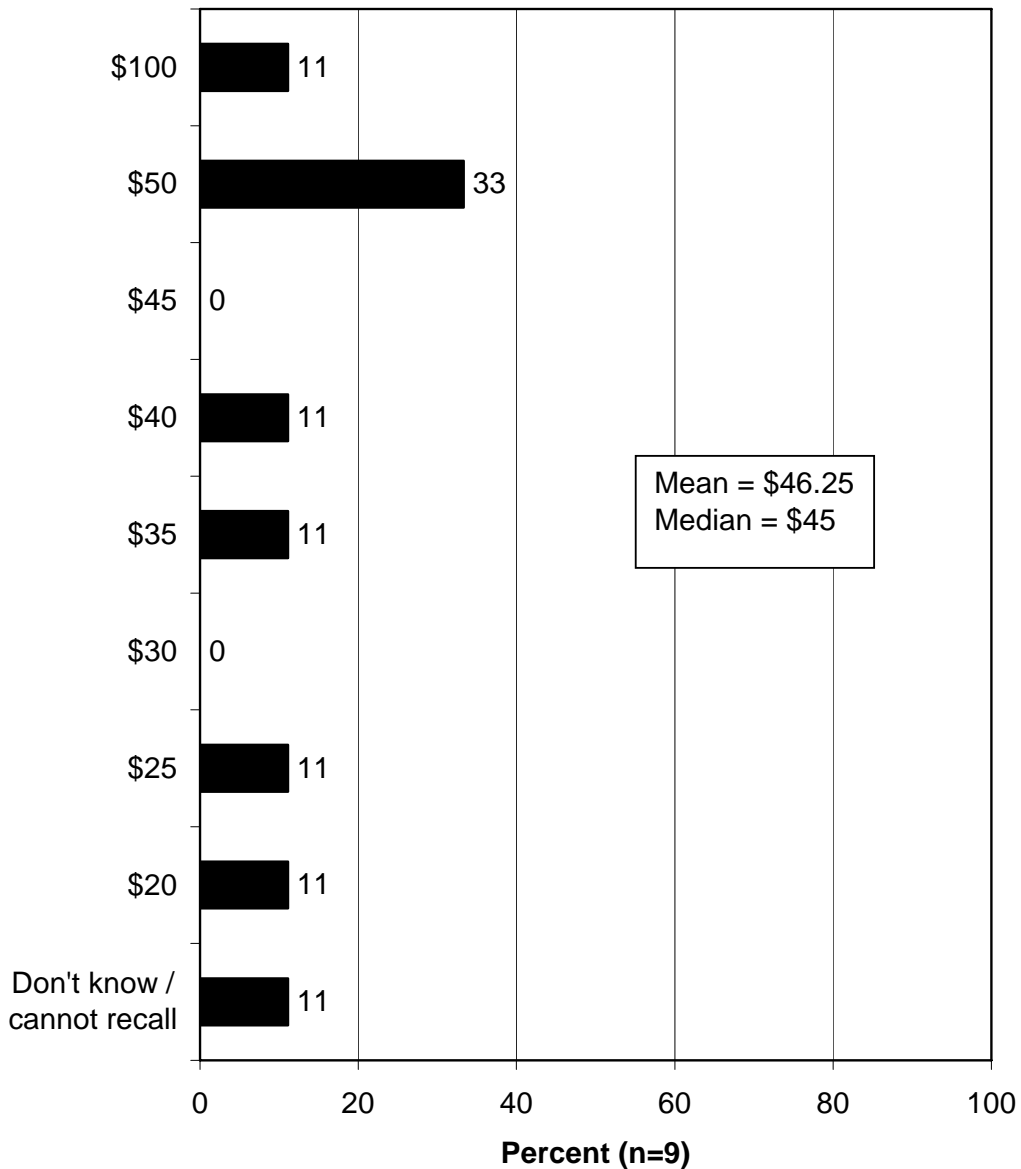
**Q30. Would you be willing to participate in a one-time educational workshop on how to view wild dolphins without disturbing them...?
(Business survey)**



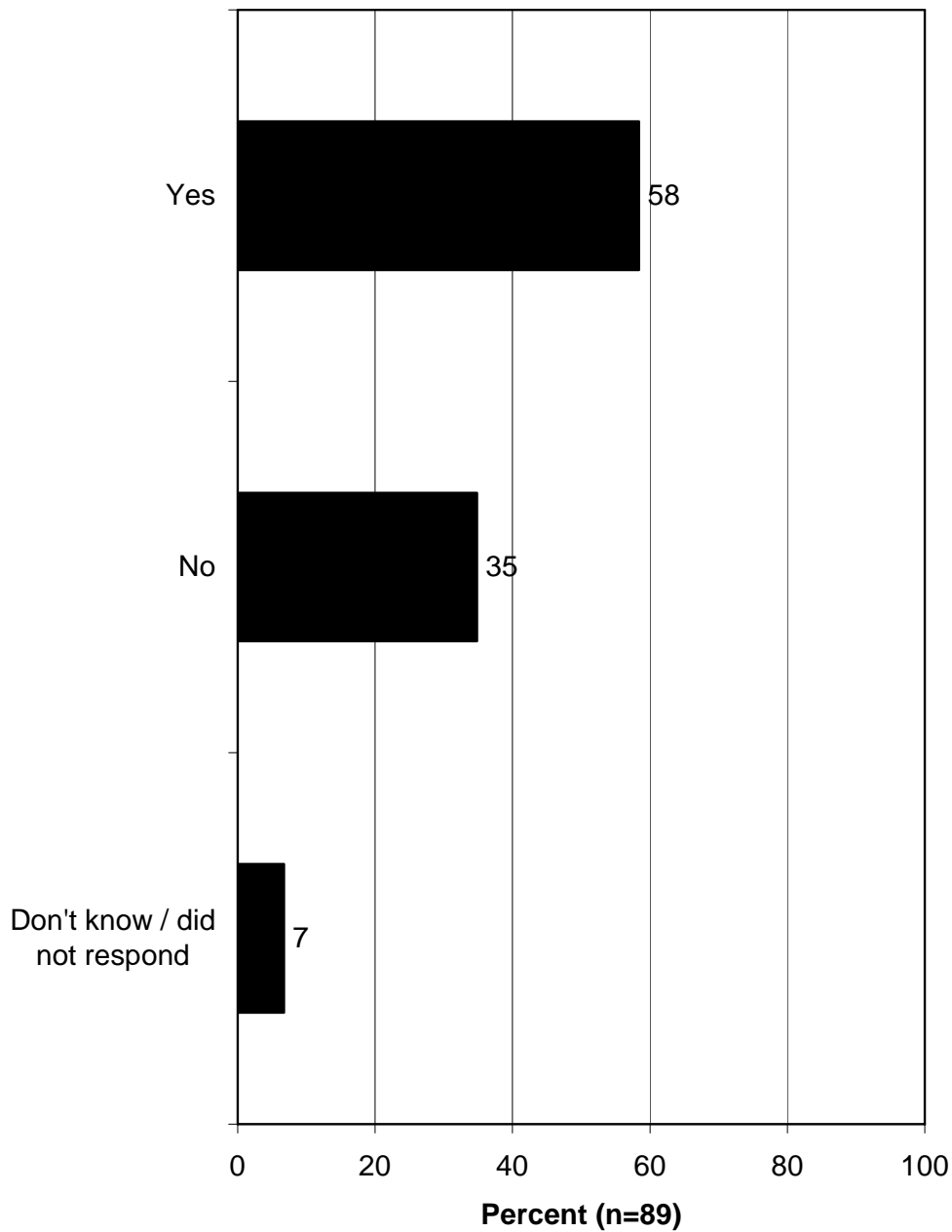
**Q30. Would you be willing to participate in a one-time educational workshop on how to view wild dolphins without disturbing them...?
(Business survey)**



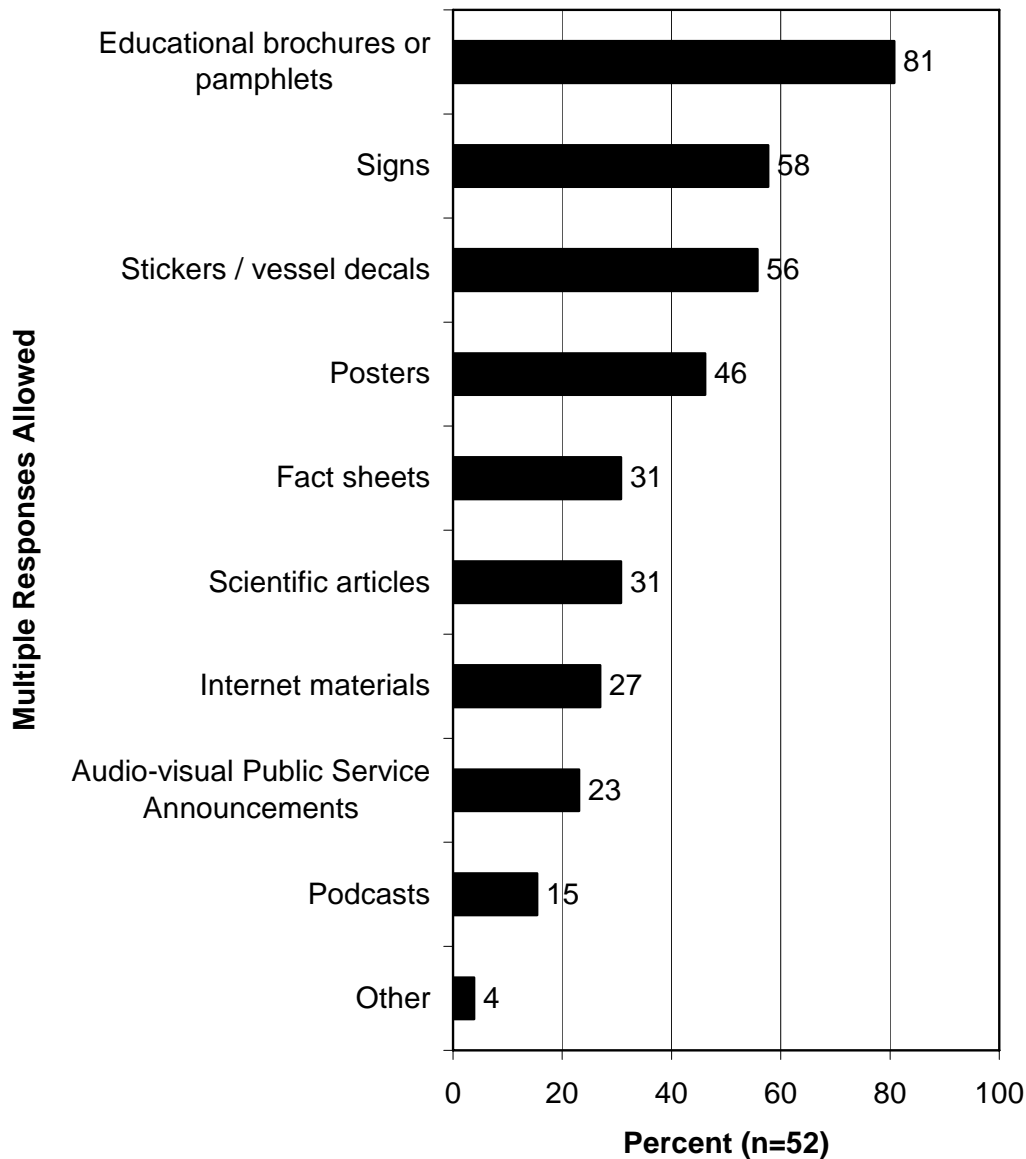
**Q31. What do you think is a reasonable cost for a half-day workshop? (Asked of those who would be willing to participate in a one-time educational workshop on how to view dolphins without disturbing them at a low cost.)
(Business survey)**



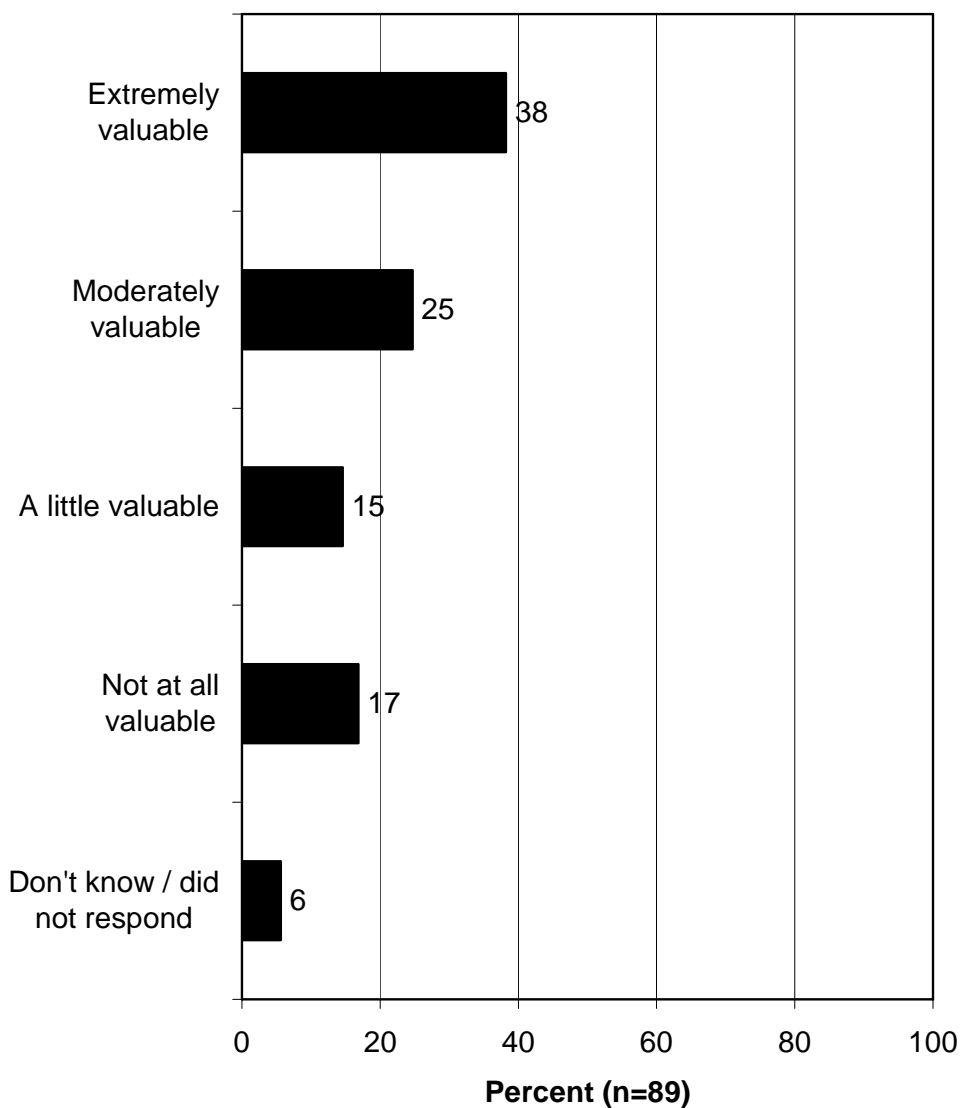
**Q32. Would you be willing to provide, display, or play pre-recorded educational materials to guests if provided to you free of charge?
(Business survey)**



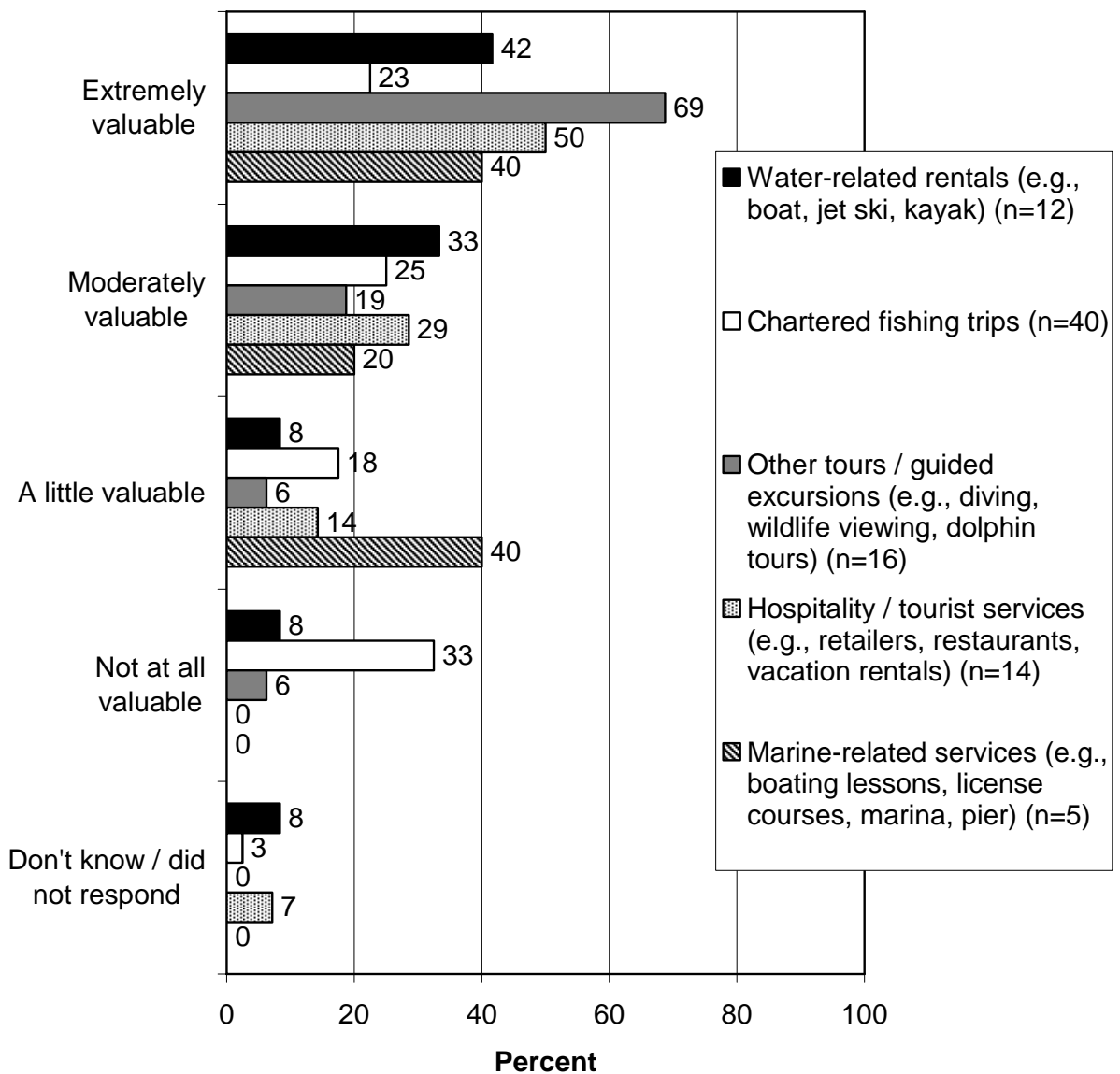
**Q33. Which educational materials would you be willing to distribute, display, or play if provided free of charge?
(Asked of those who would be willing to provide, display, or play pre-recorded educational materials to guests if they were provided free of charge.)
(Business survey)**



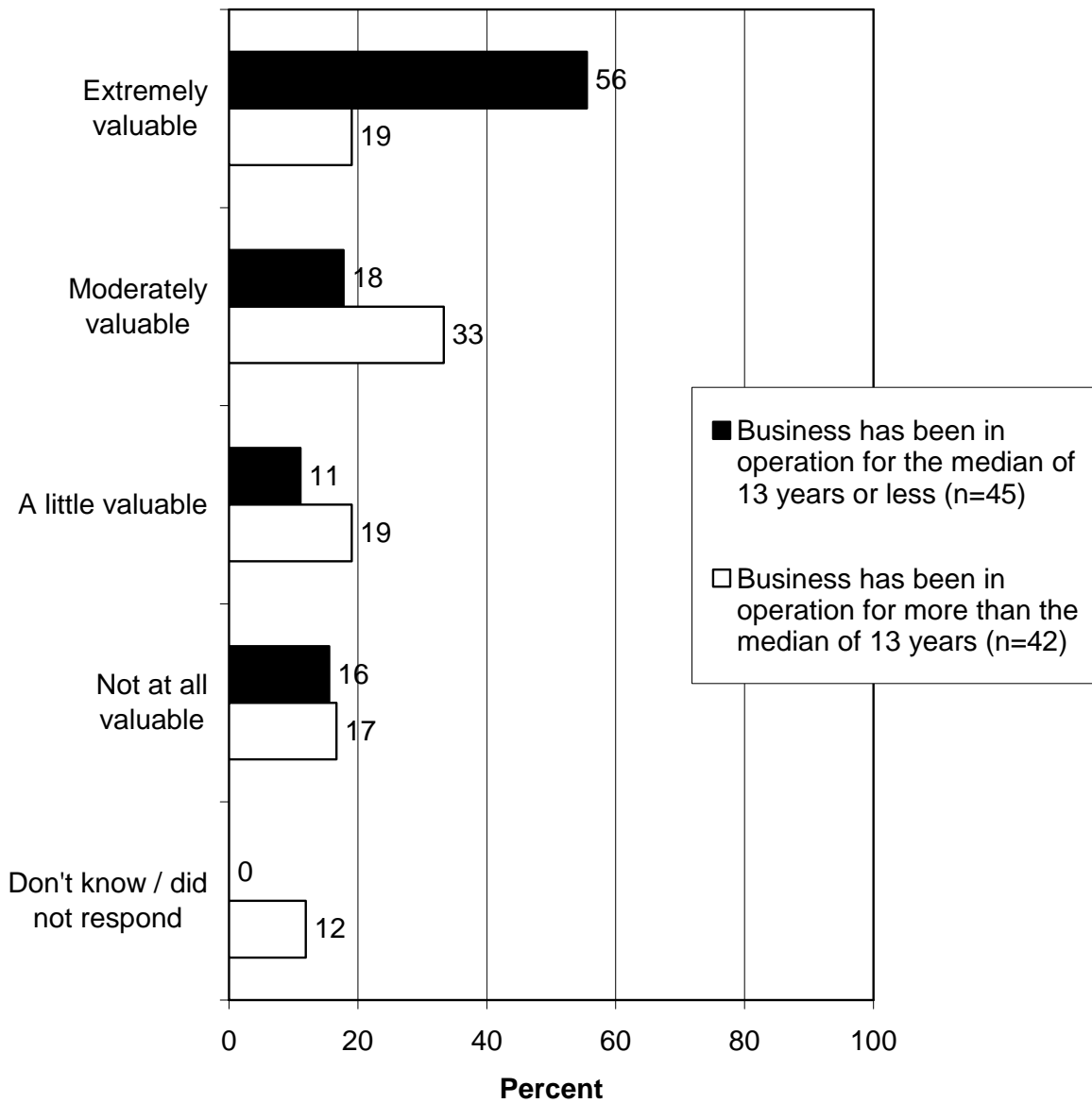
**Q34. How valuable would you say a program is that provides incentives for businesses who voluntarily help to enhance conservation of wild dolphins by promoting responsible viewing and advertising, as well as providing guests with educational information on dolphins? (In other words, valuable to the Panama City area as a whole.)
(Business survey)**



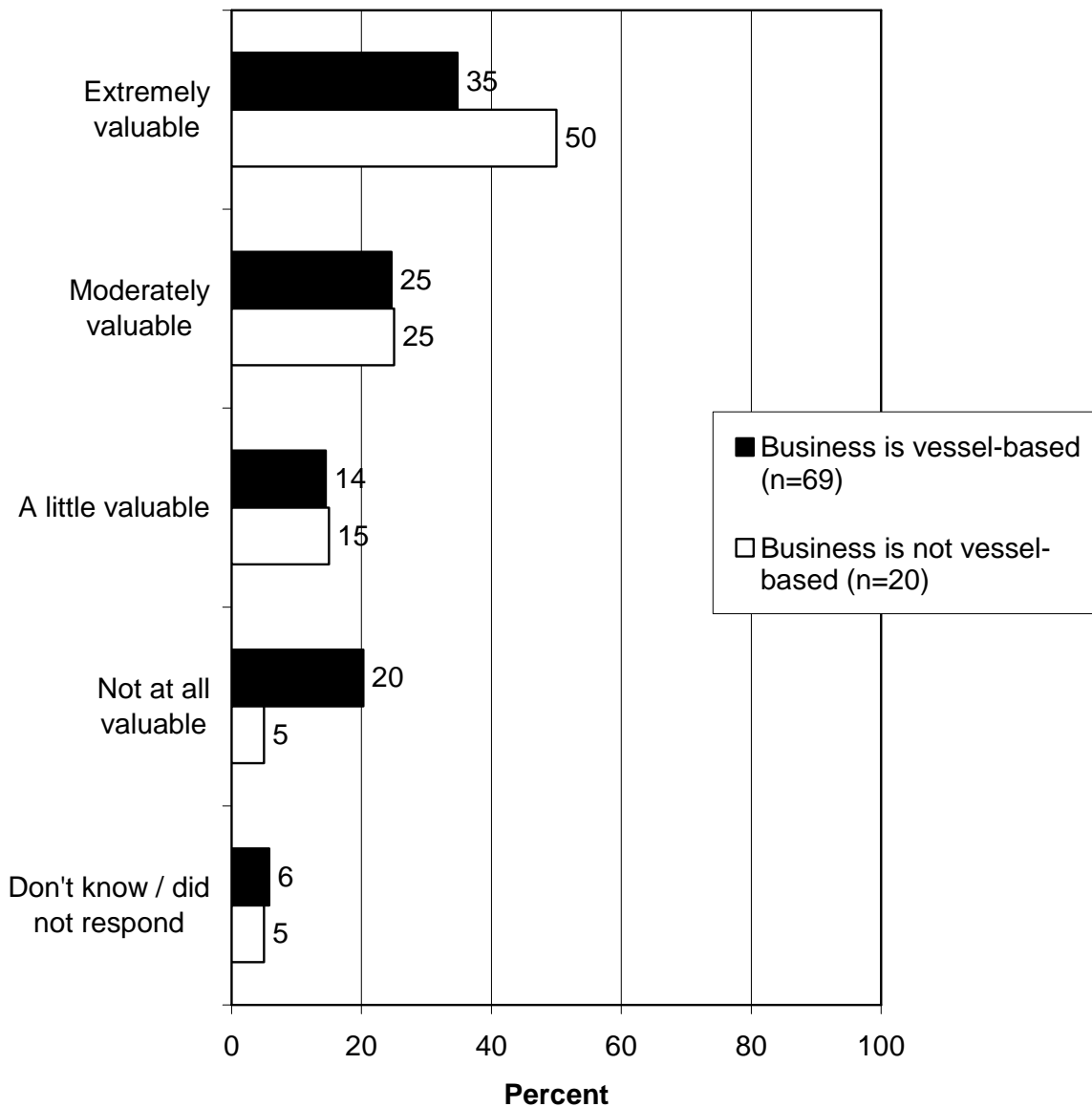
Q34. How valuable would you say a program is that provides incentives for businesses who voluntarily help to enhance conservation of wild dolphins by promoting responsible viewing and advertising, as well as providing guests with educational information on dolphins? (In other words, valuable to the Panama City area as a whole.)
(Business survey)



**Q34. How valuable would you say a program is that provides incentives for businesses who voluntarily help to enhance conservation of wild dolphins by promoting responsible viewing and advertising, as well as providing guests with educational information on dolphins? (In other words, valuable to the Panama City area as a whole.)
(Business survey)**

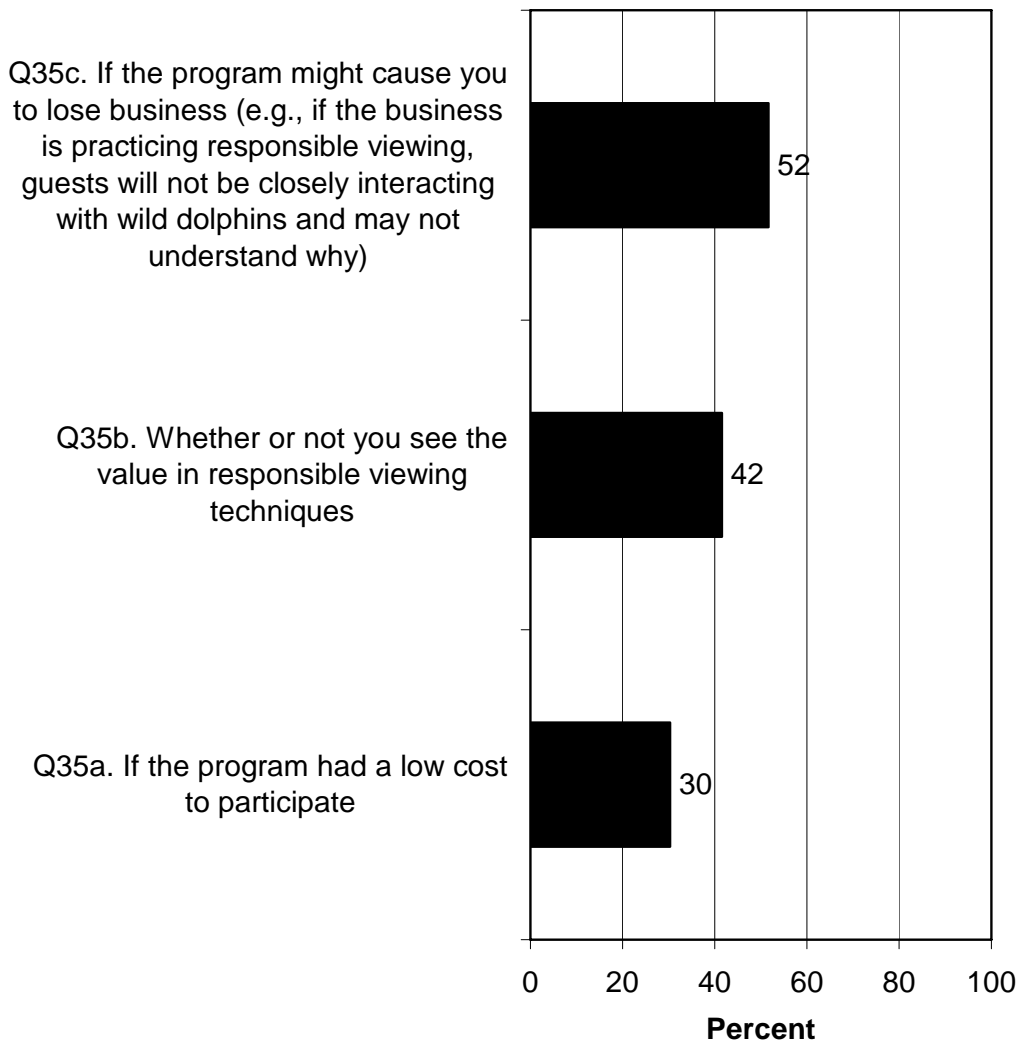


**Q34. How valuable would you say a program is that provides incentives for businesses who voluntarily help to enhance conservation of wild dolphins by promoting responsible viewing and advertising, as well as providing guests with educational information on dolphins? (In other words, valuable to the Panama City area as a whole.)
(Business survey)**

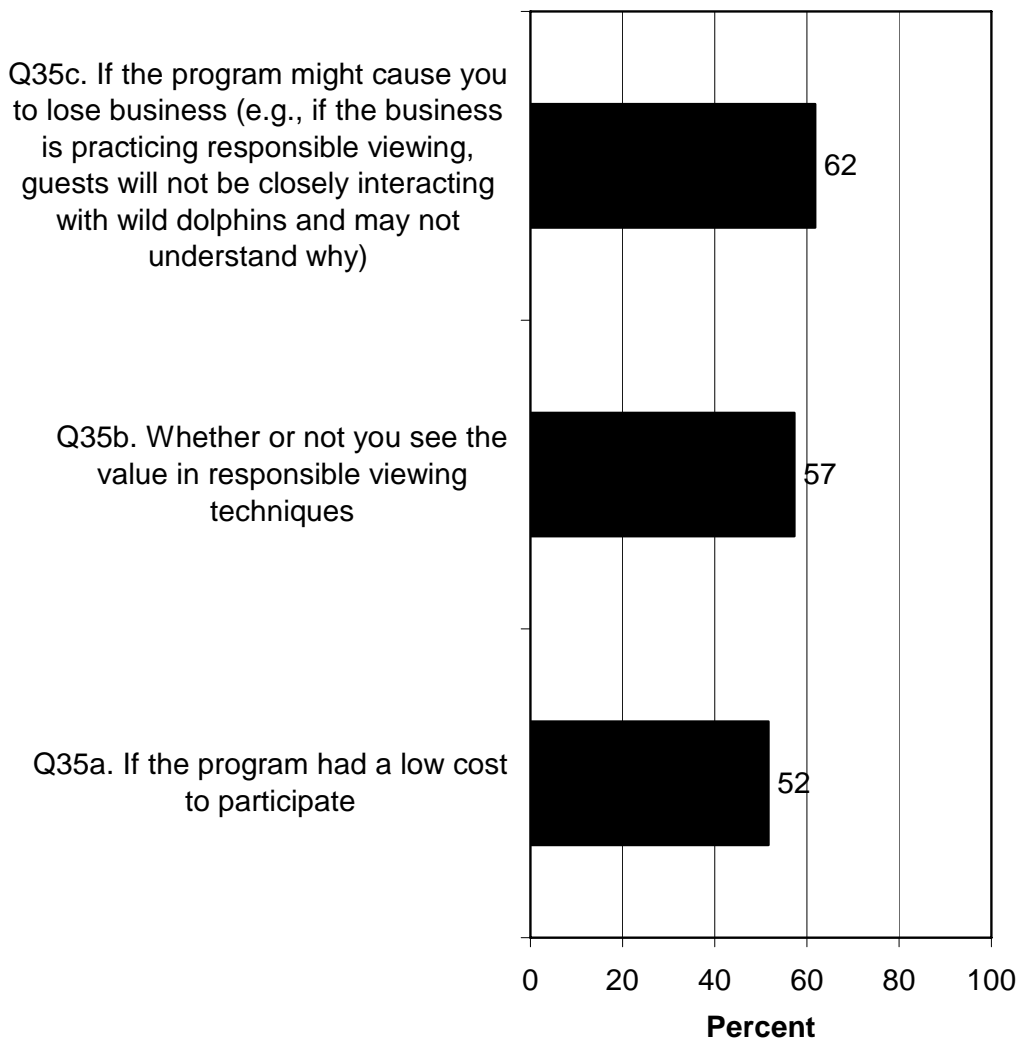


Percent who indicated that the following factors would be very important in deciding whether their business would participate in a program that provides incentives for businesses that voluntarily help to enhance conservation of wild dolphins by promoting responsible viewing and advertising, as well as providing guests with educational information on dolphins.

(Business survey)

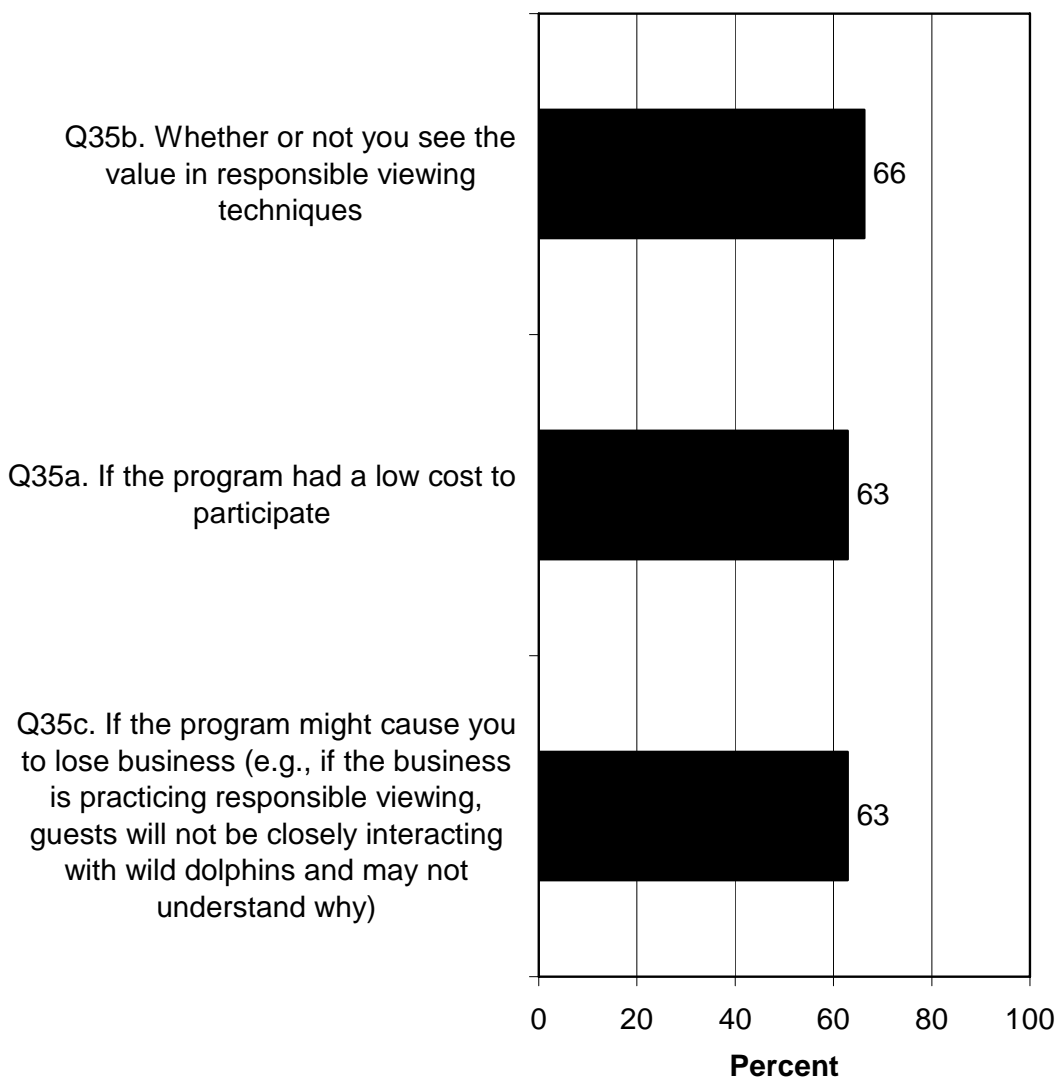


**Percent who indicated that the following factors would be very or somewhat important in deciding whether their business would participate in a program that provides incentives for businesses that voluntarily help to enhance conservation of wild dolphins by promoting responsible viewing and advertising, as well as providing guests with educational information on dolphins.
(Business survey)**

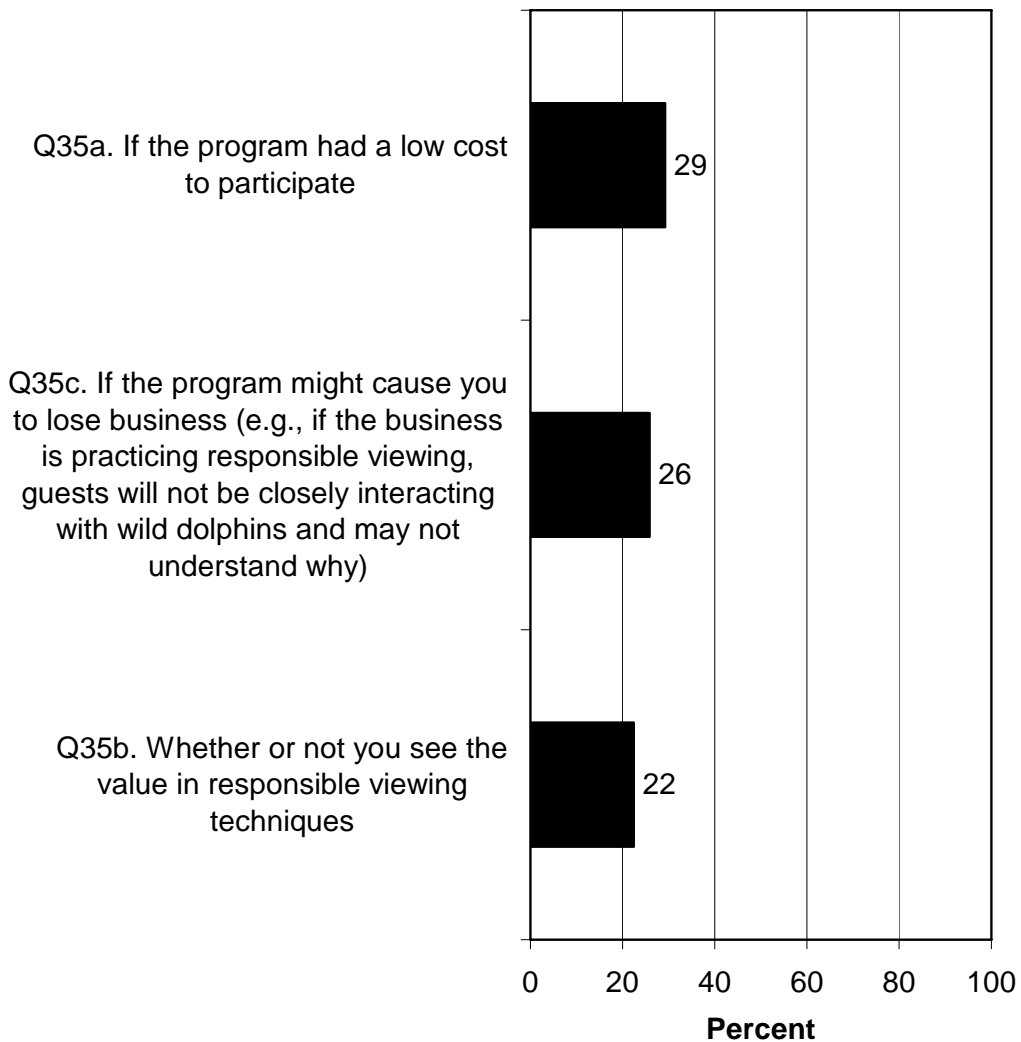


Percent who indicated that the following factors would be very, somewhat, or a little important in deciding whether their business would participate in a program that provides incentives for businesses that voluntarily help to enhance conservation of wild dolphins by promoting responsible viewing and advertising, as well as providing guests with educational information on dolphins.

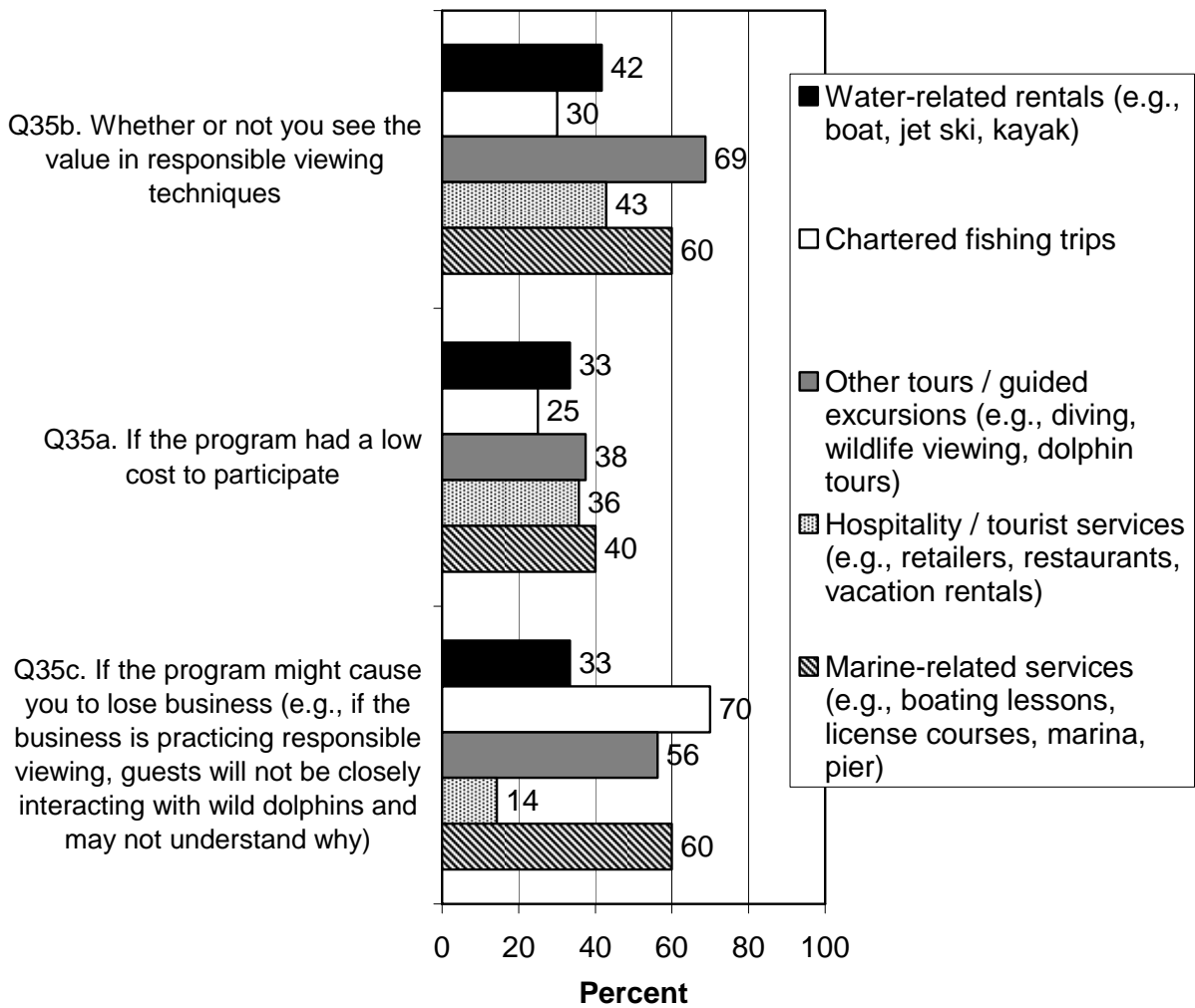
(Business survey)



**Percent who indicated that the following factors would be not at all important in deciding whether their business would participate in a program that provides incentives for businesses that voluntarily help to enhance conservation of wild dolphins by promoting responsible viewing and advertising, as well as providing guests with educational information on dolphins.
(Business survey)**

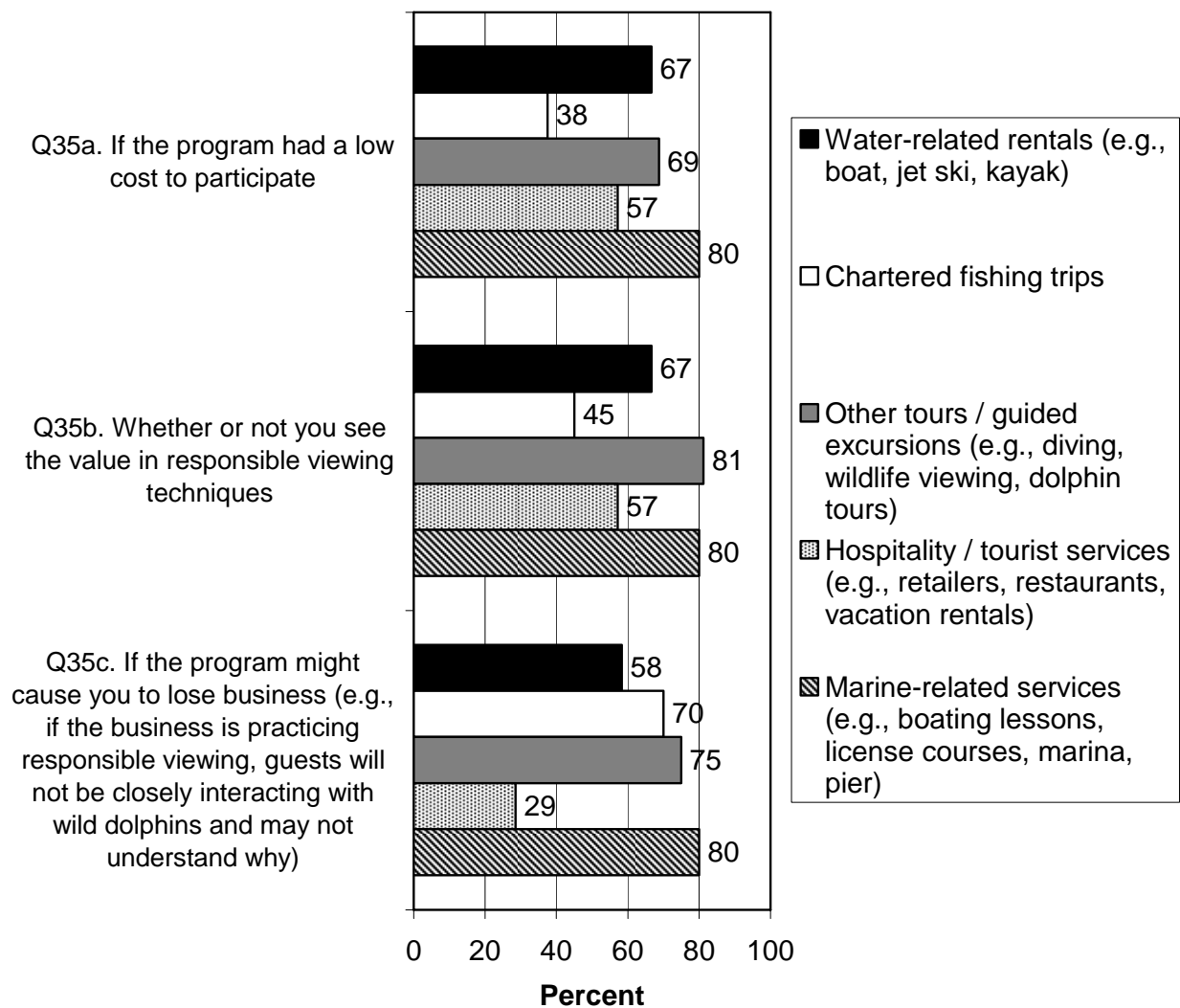


**Percent who indicated that the following would be very important in deciding whether their business would participate in a program that provides incentives for businesses that voluntarily help to enhance conservation of wild dolphins by promoting responsible viewing and advertising, as well as providing guests with educational information on dolphins.
(Business survey)**

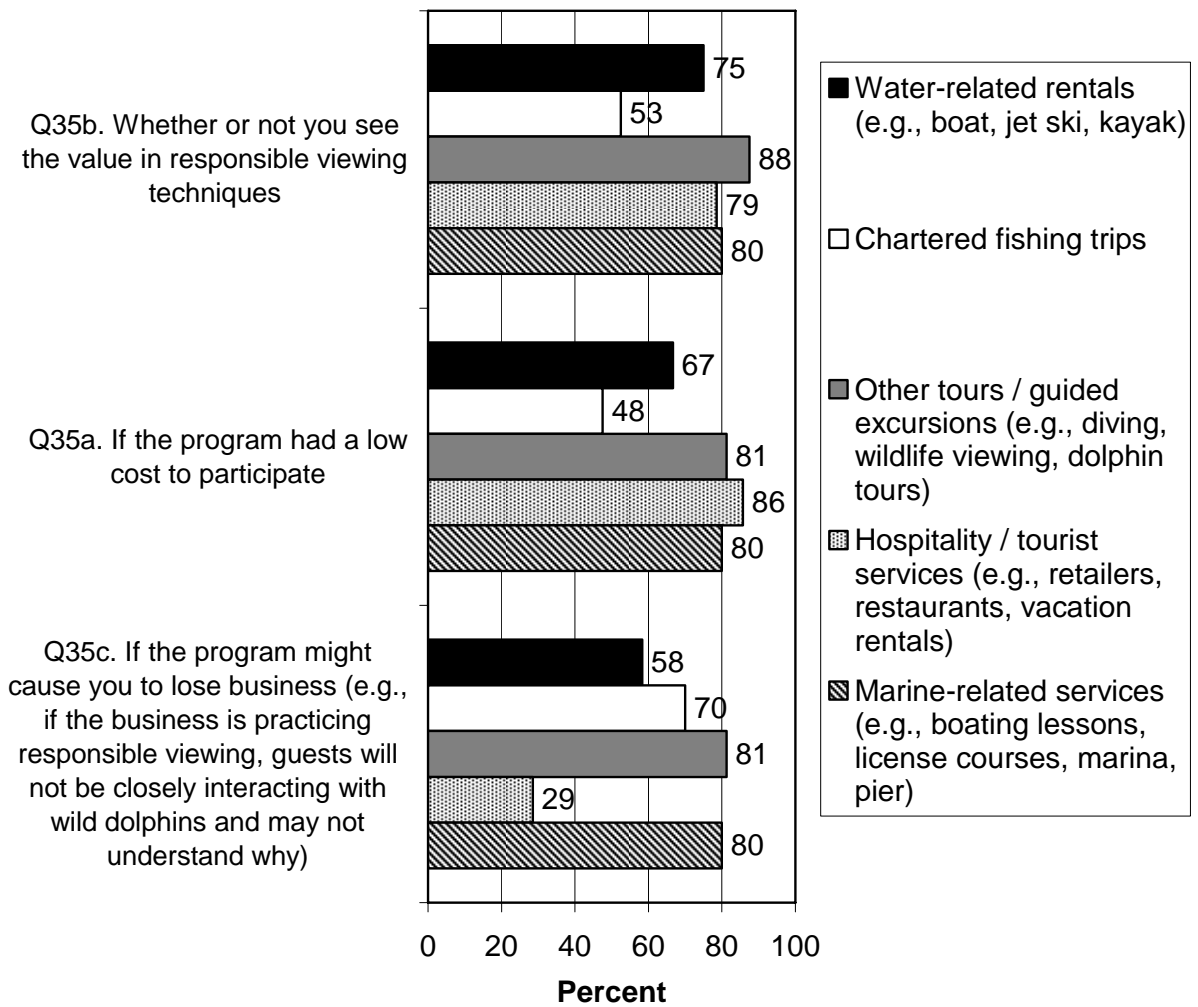


Percent who indicated that the following would be very or somewhat important in deciding whether their business would participate in a program that provides incentives for businesses that voluntarily help to enhance conservation of wild dolphins by promoting responsible viewing and advertising, as well as providing guests with educational information on dolphins.

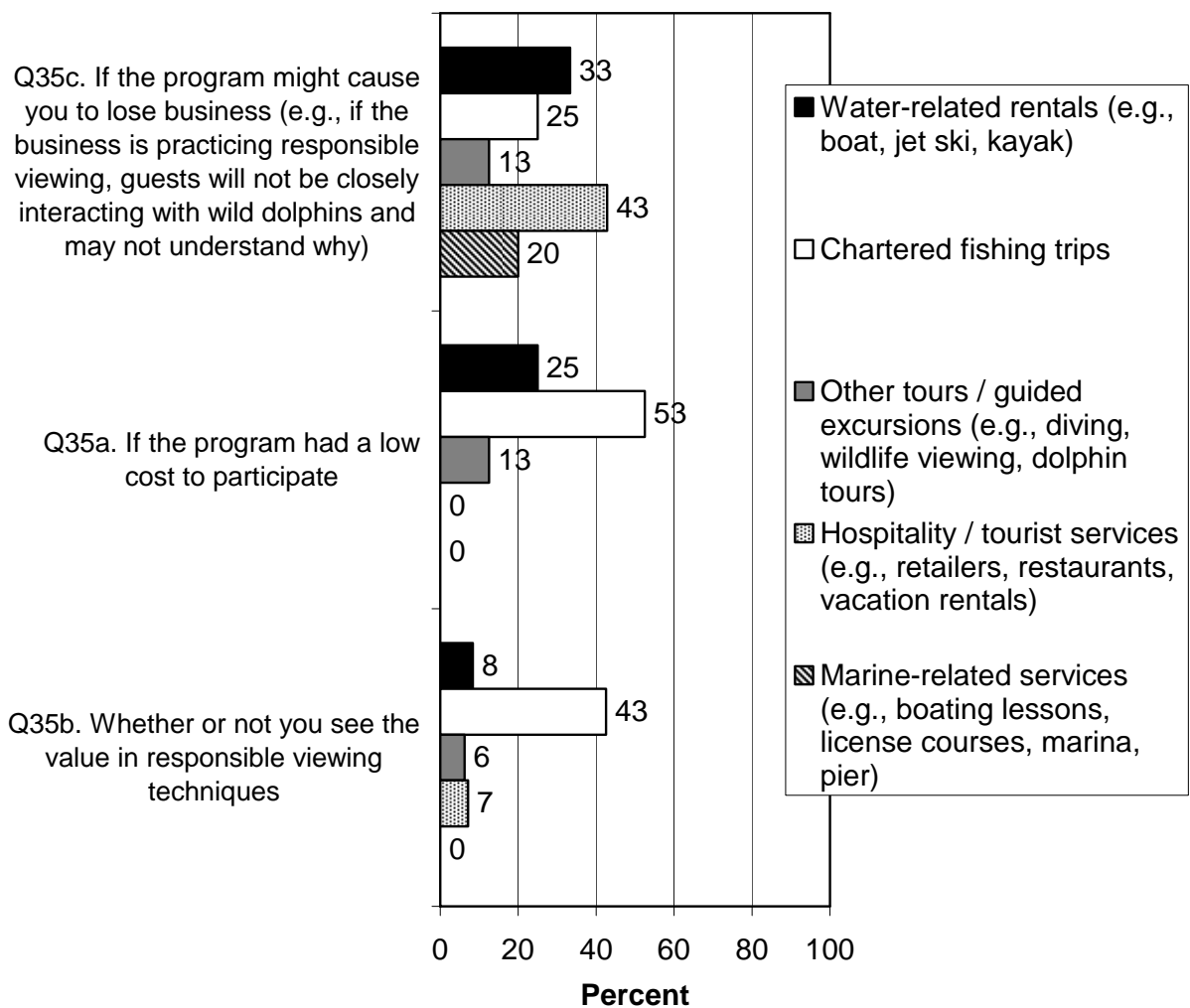
(Business survey)



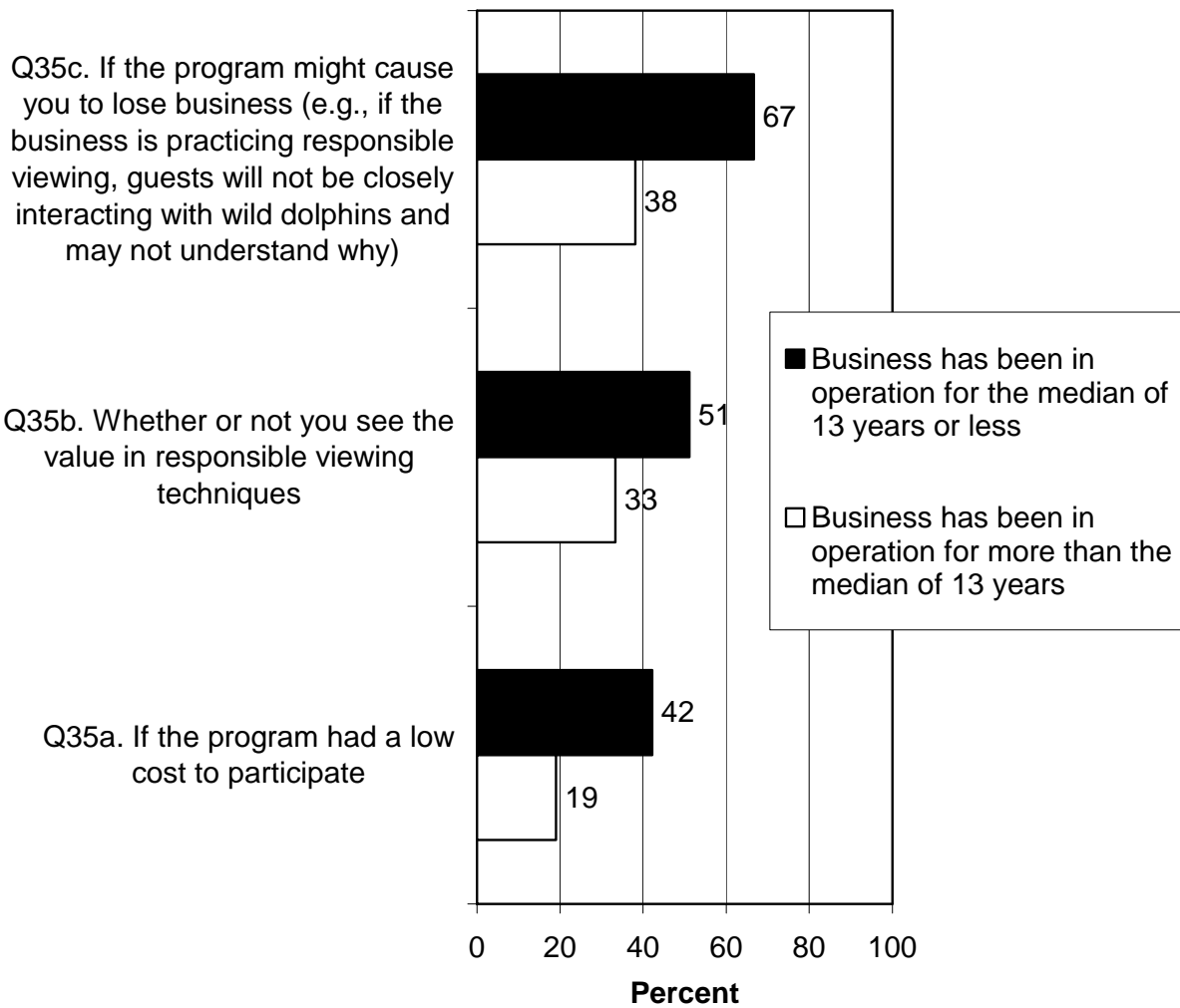
**Percent who indicated that the following would be very, somewhat, or a little important in deciding whether their business would participate in a program that provides incentives for businesses that voluntarily help to enhance conservation of wild dolphins by promoting responsible viewing and advertising, as well as providing guests with educational information on dolphins.
(Business survey)**



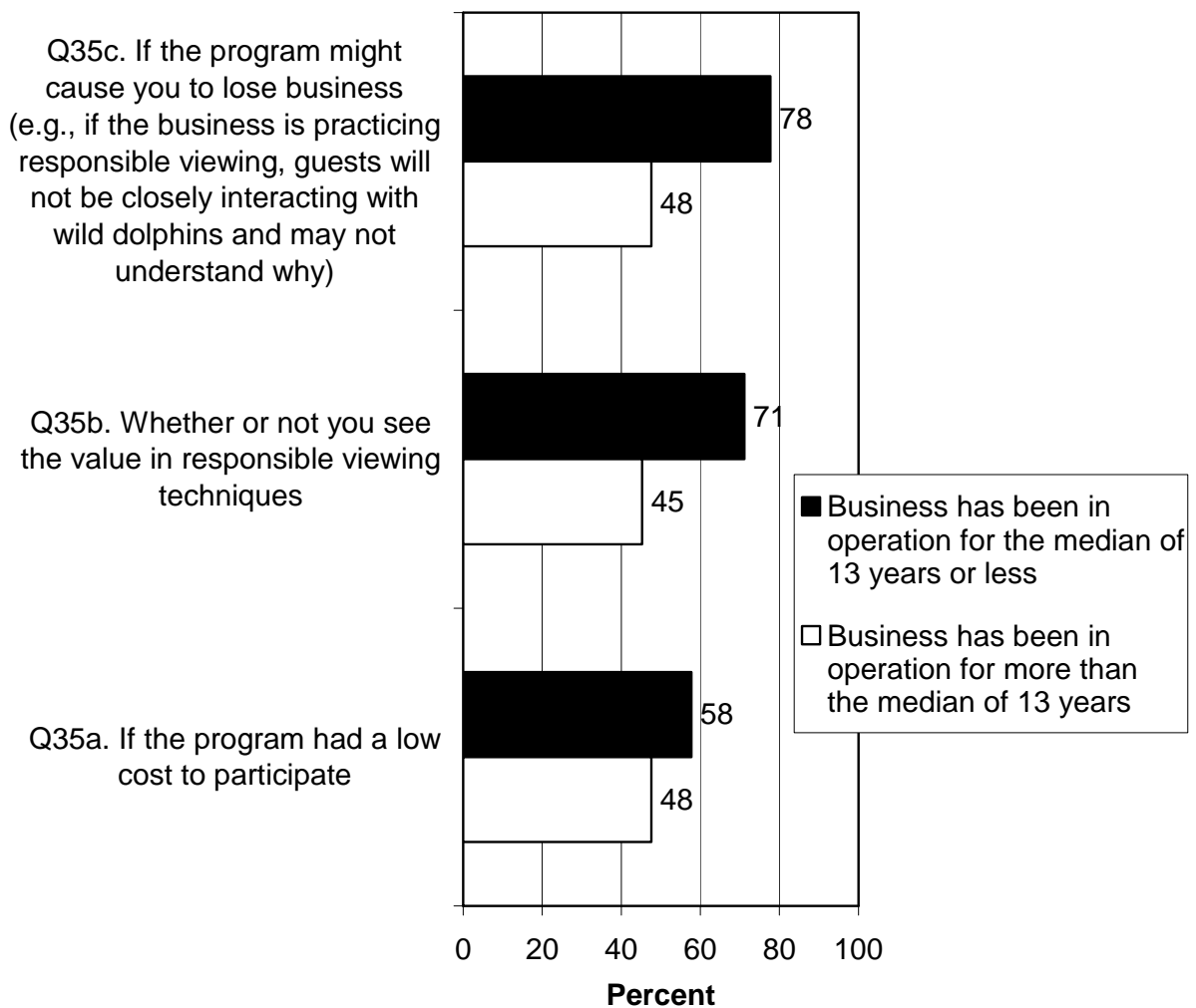
**Percent who indicated that the following would be not at all important in deciding whether their business would participate in a program that provides incentives for businesses that voluntarily help to enhance conservation of wild dolphins by promoting responsible viewing and advertising, as well as providing guests with educational information on dolphins.
(Business survey)**



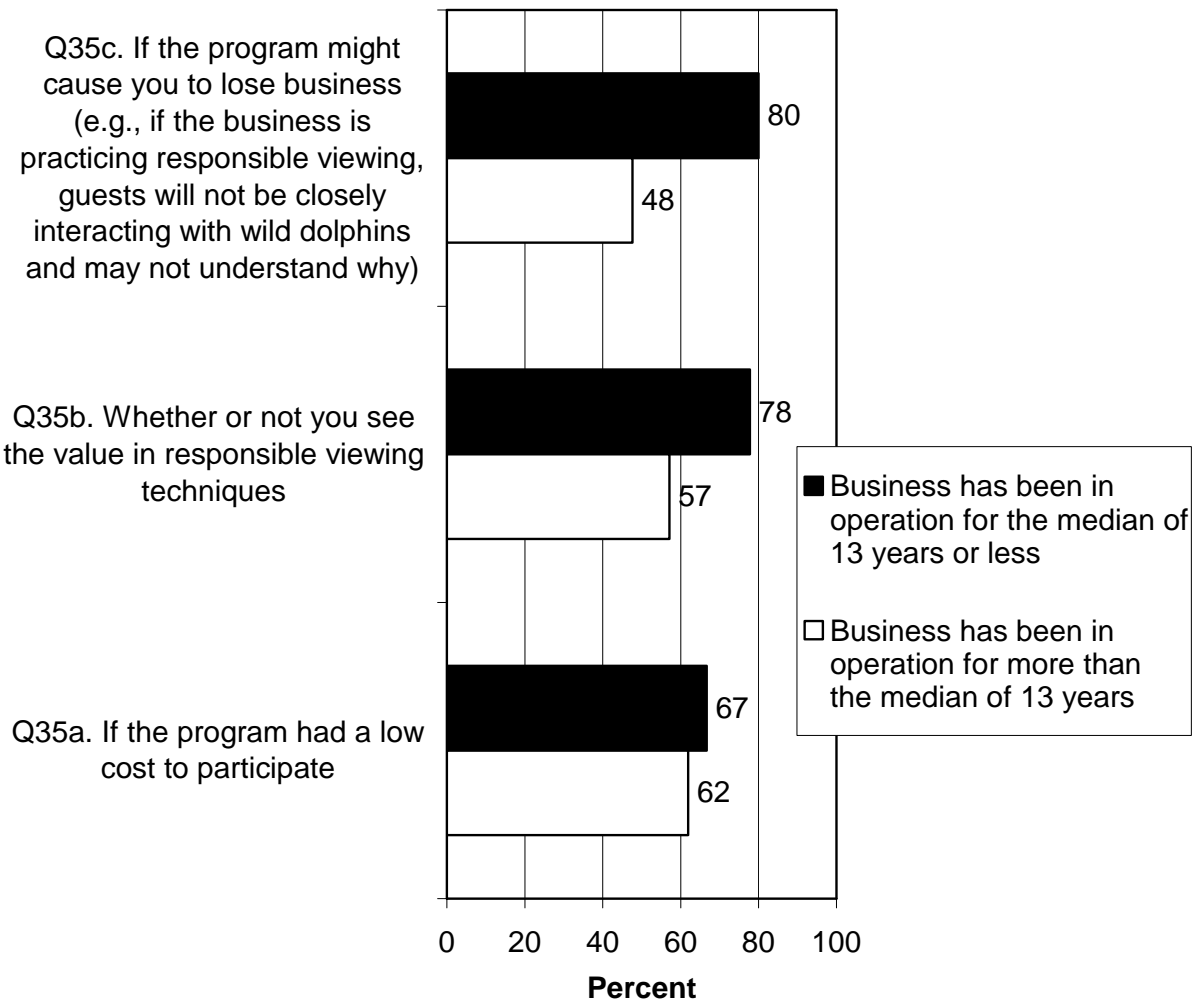
**Percent who indicated that the following would be very important in deciding whether their business would participate in a program that provides incentives for businesses that voluntarily help to enhance conservation of wild dolphins by promoting responsible viewing and advertising, as well as providing guests with educational information on dolphins.
(Business survey)**



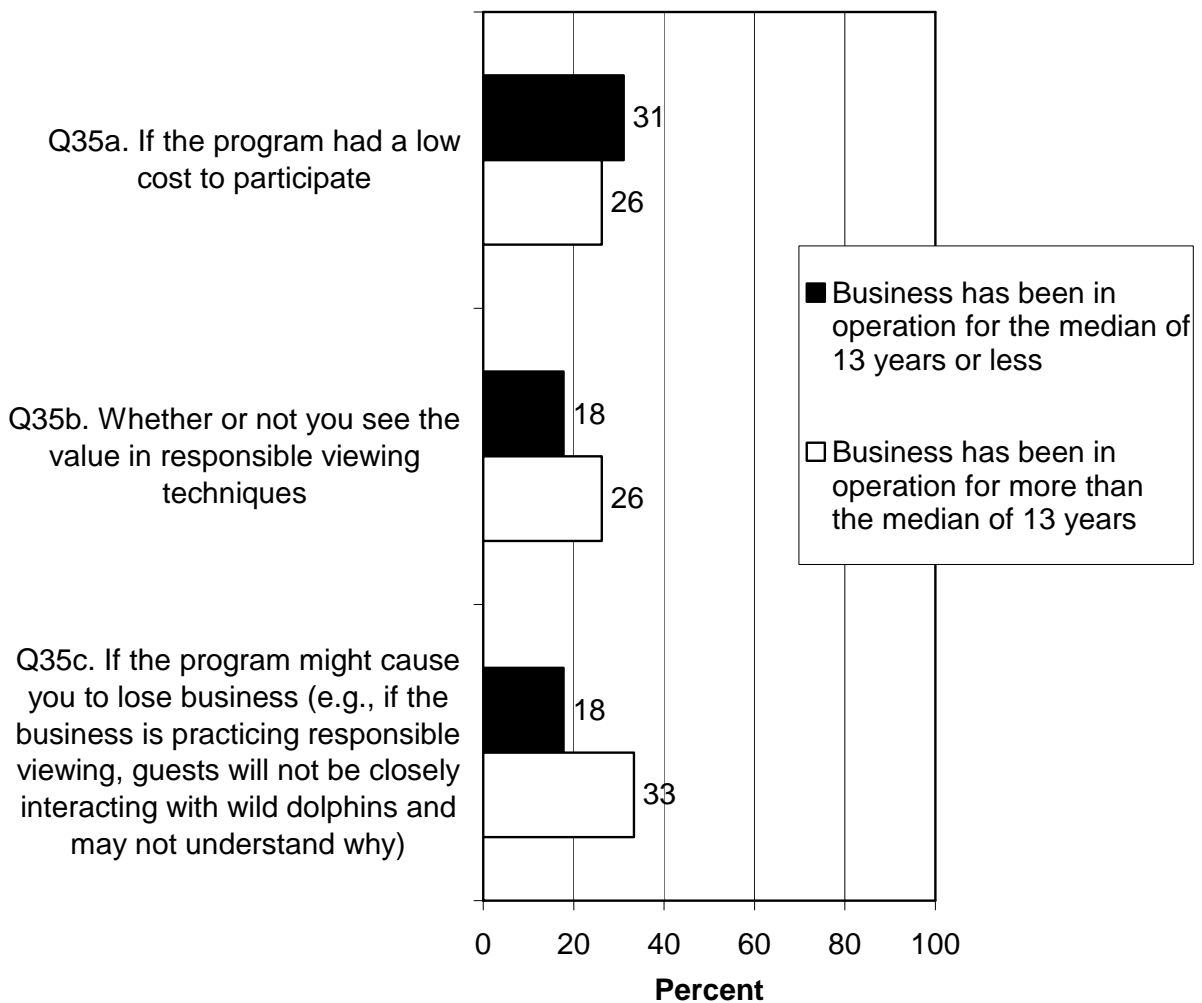
**Percent who indicated that the following would be very or somewhat important in deciding whether their business would participate in a program that provides incentives for businesses that voluntarily help to enhance conservation of wild dolphins by promoting responsible viewing and advertising, as well as providing guests with educational information on dolphins.
(Business survey)**



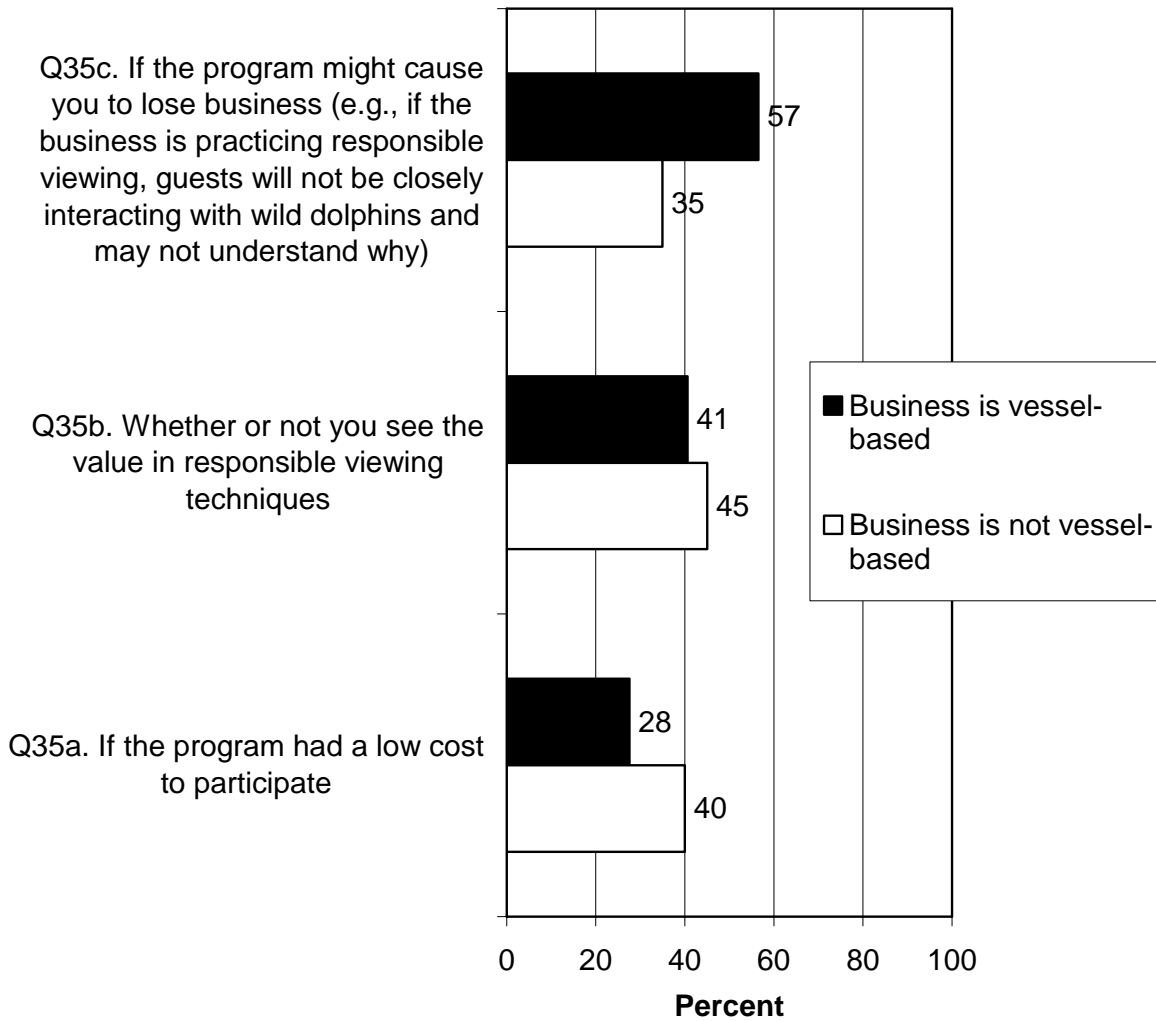
**Percent who indicated that the following would be very, somewhat, or a little important in deciding whether their business would participate in a program that provides incentives for businesses that voluntarily help to enhance conservation of wild dolphins by promoting responsible viewing and advertising, as well as providing guests with educational information on dolphins.
(Business survey)**



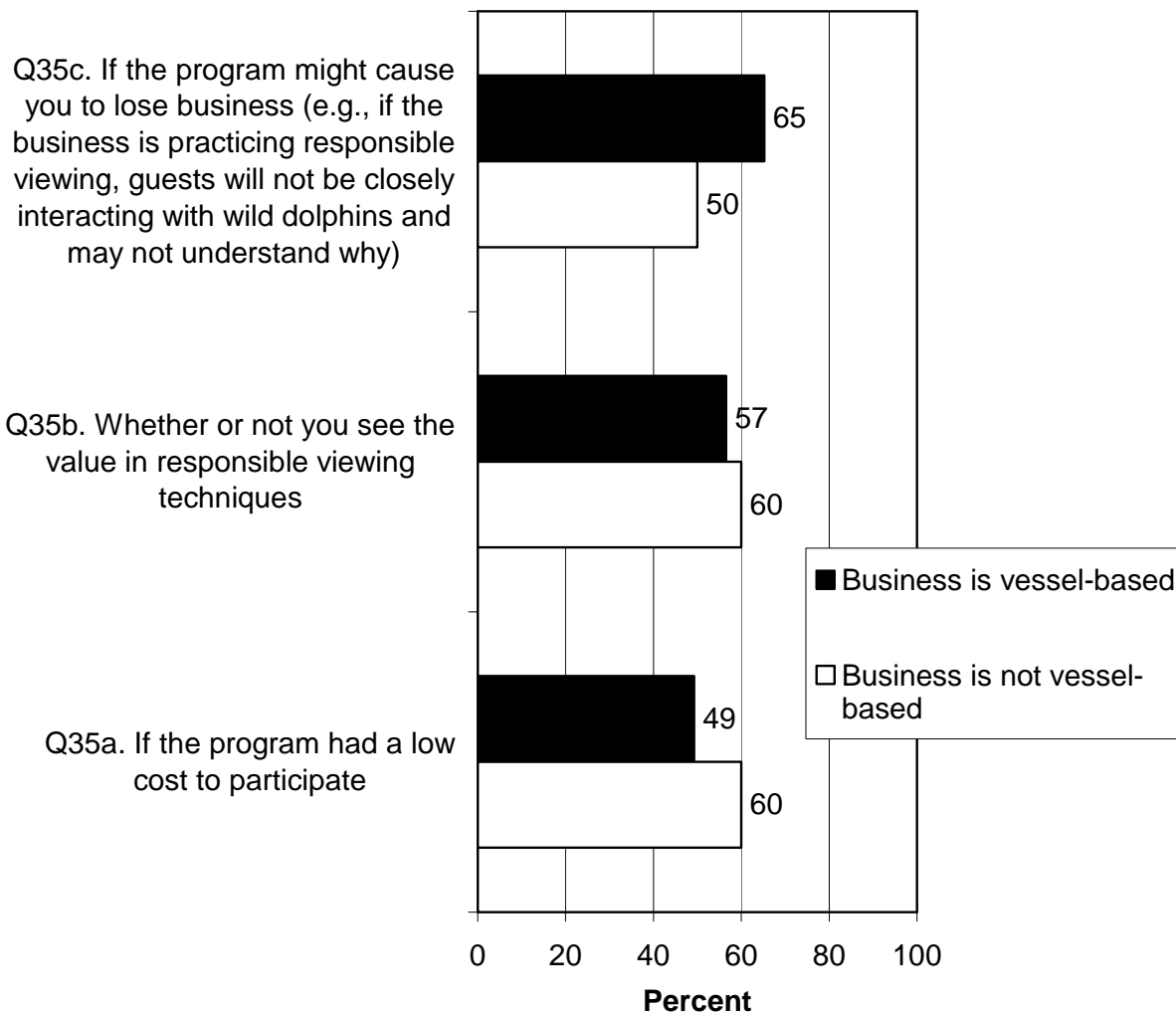
**Percent who indicated that the following would be not at all important in deciding whether their business would participate in a program that provides incentives for businesses that voluntarily help to enhance conservation of wild dolphins by promoting responsible viewing and advertising, as well as providing guests with educational information on dolphins.
(Business survey)**



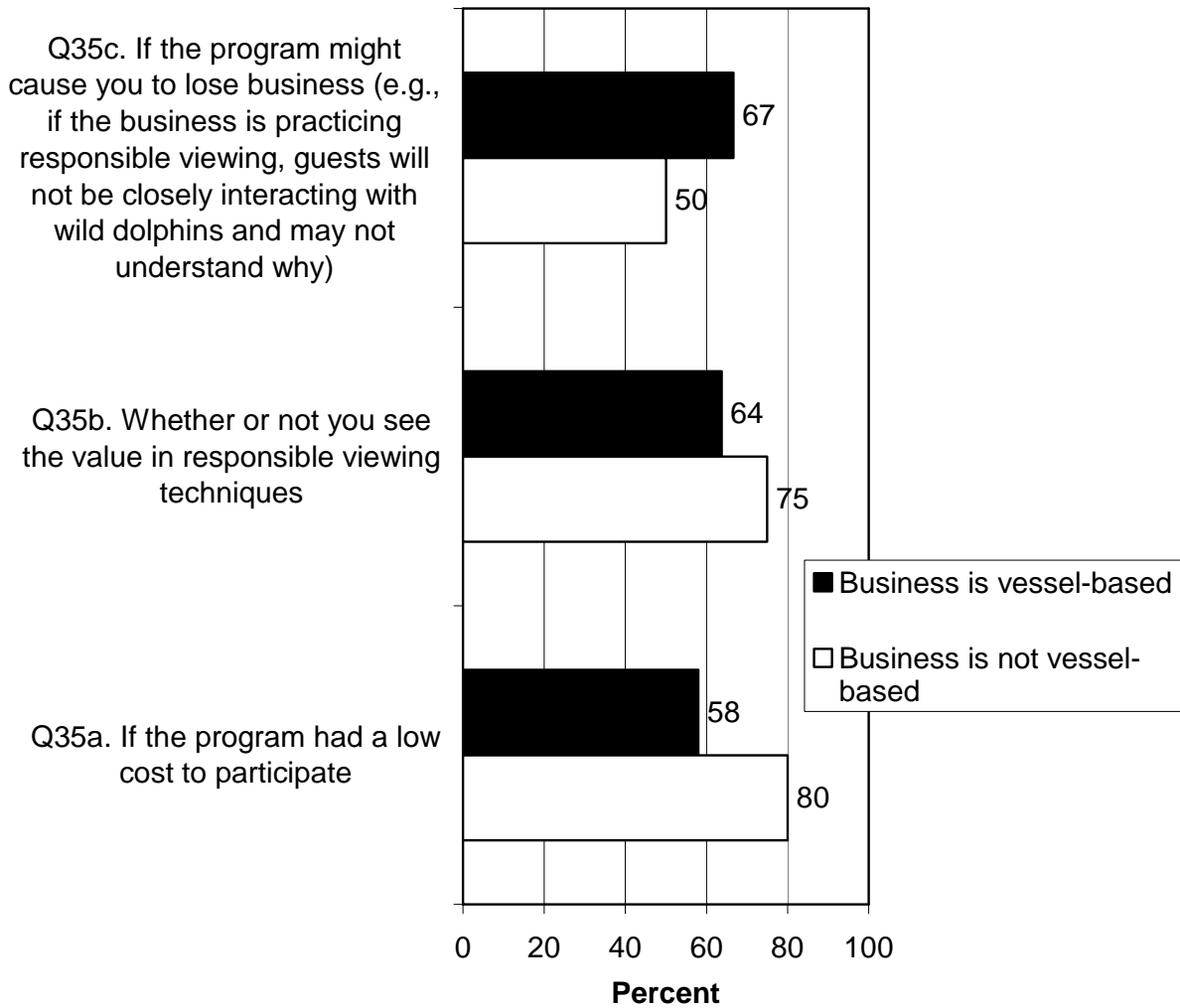
**Percent who indicated that the following would be very important in deciding whether their business would participate in a program that provides incentives for businesses that voluntarily help to enhance conservation of wild dolphins by promoting responsible viewing and advertising, as well as providing guests with educational information on dolphins.
(Business survey)**



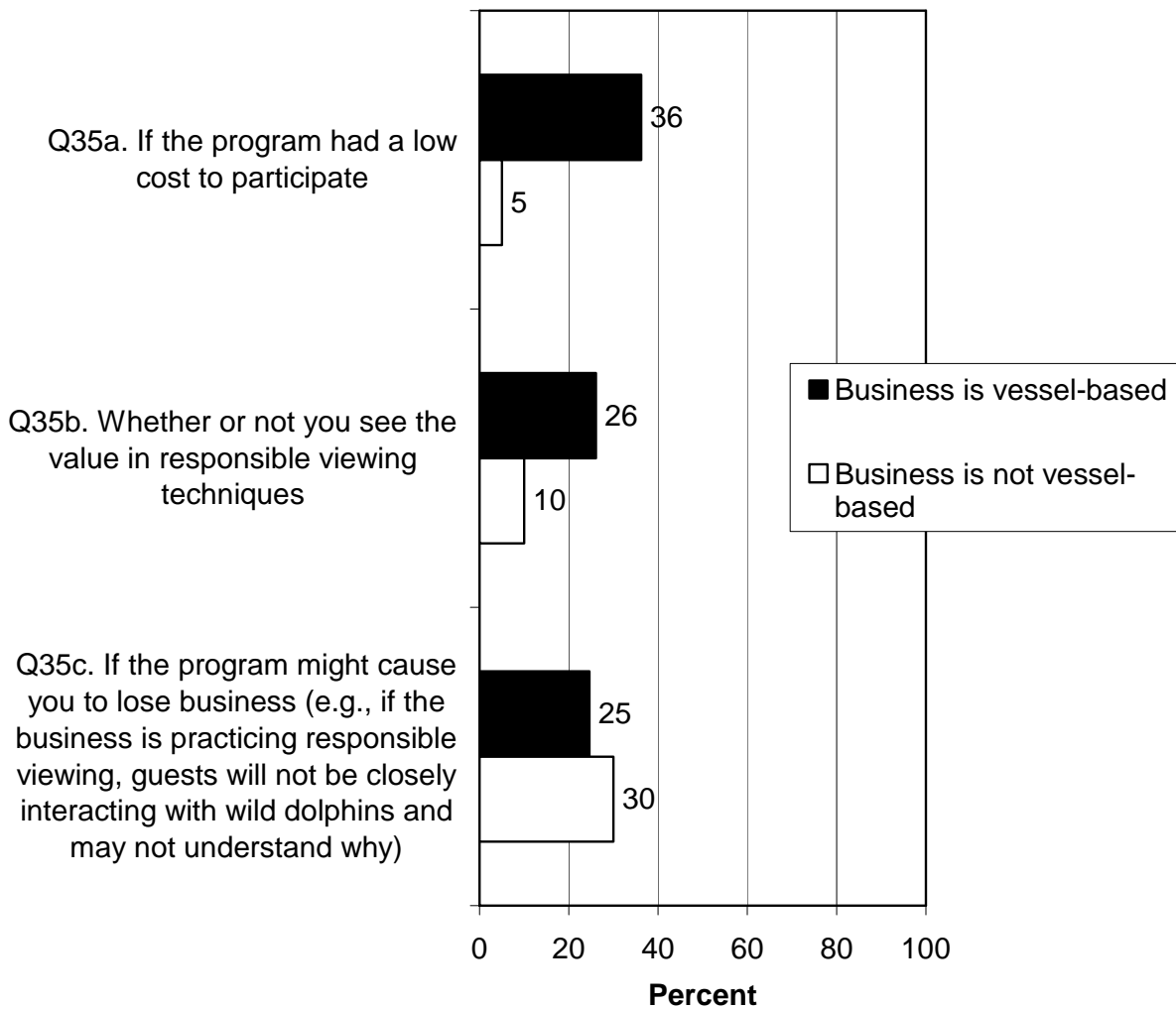
**Percent who indicated that the following would be very or somewhat important in deciding whether their business would participate in a program that provides incentives for businesses that voluntarily help to enhance conservation of wild dolphins by promoting responsible viewing and advertising, as well as providing guests with educational information on dolphins.
(Business survey)**



**Percent who indicated that the following would be very, somewhat, or a little important in deciding whether their business would participate in a program that provides incentives for businesses that voluntarily help to enhance conservation of wild dolphins by promoting responsible viewing and advertising, as well as providing guests with educational information on dolphins.
(Business survey)**



**Percent who indicated that the following would be not at all important in deciding whether their business would participate in a program that provides incentives for businesses that voluntarily help to enhance conservation of wild dolphins by promoting responsible viewing and advertising, as well as providing guests with educational information on dolphins.
(Business survey)**



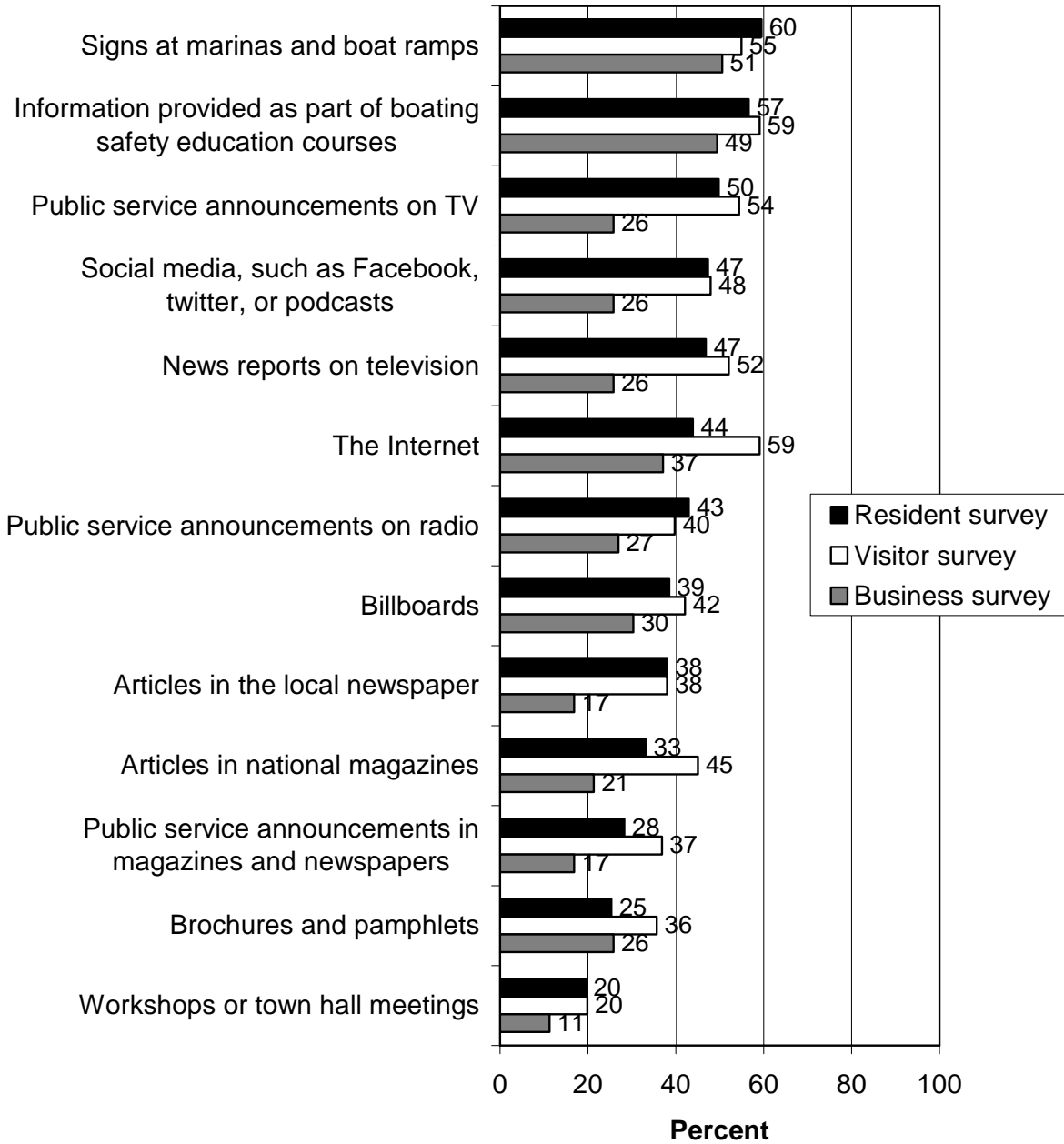
OPINIONS ON THE EFFECTIVENESS OF VARIOUS OUTREACH METHODS

- All three groups were asked to rate the effectiveness of a series of delivery methods for public outreach and education on safe dolphin viewing. The results from each group are discussed separately below, while the graphs in this section show the combined responses from residents, visitors, and business operators.
 - In looking at the ranking by the percentage rating each delivery method as *very* effective, the top-ranked delivery methods among **residents** include signs at marinas and boat ramps (rated as *very* effective by 60% of residents), information provided as part of boating safety education courses (57%), and public service announcements on TV (50%).
 - Among **visitors**, the top-ranked delivery methods included the Internet (rated as *very* effective by 59% of visitors), information provided as part of boating safety education courses (59%), signs at marinas and boat ramps (55%), public service announcements on TV (54%), and news reports on TV (52%).

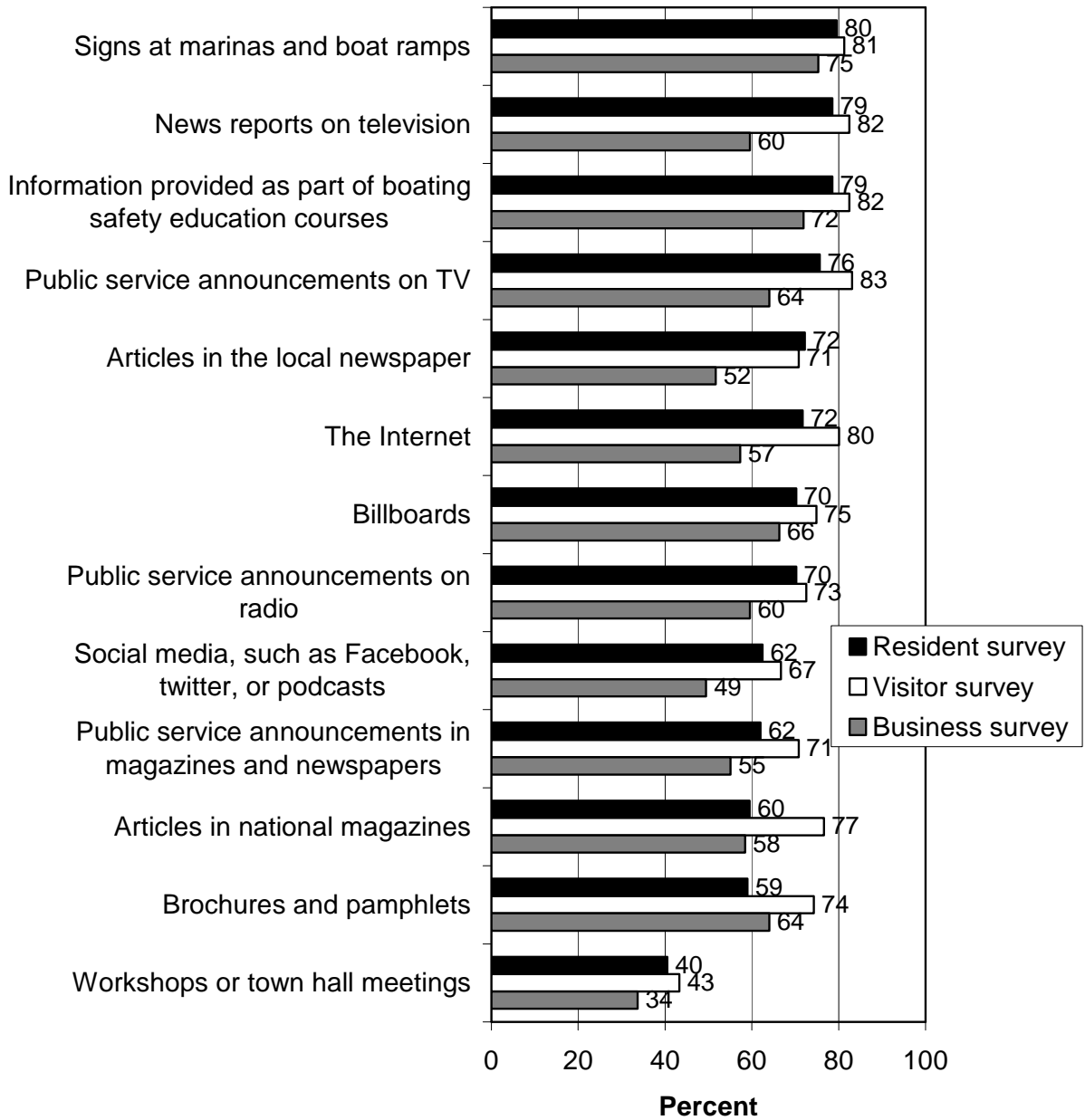
- Just two delivery methods stood out as the most important delivery methods rated as *very* important by **business operators**: signs at marinas and boat ramps (rated as *very* effective by 51% of business operators) and information provided as part of boating safety education courses (49%). Otherwise, at least a quarter of business operators rated the following delivery methods as *very* important: the Internet (37%), billboards (30%), public service announcements on radio (27%), brochures and pamphlets (26%), public service announcements on TV (26%), social media, such as Facebook, Twitter, or podcasts (26%), and news reports on television (26%).
 - Three graphs in this section show the business survey crosstabulations by business type, years in operation, and vessel-based or non-vessel-based businesses. (Note that only the rankings by the percentages rating the various outreach methods as *very important* are shown.)
 - The crosstabulations found that operators of guided tours or excursions (e.g., diving, wildlife viewing, dolphin tours), compared to the other types of businesses, appear more likely to view information provided as part of boating safety education courses as a *very* effective delivery method. At the same time, operators of hospitality/tourist

- services businesses (e.g., retailers, restaurants, vacation rentals), compared to the other types of businesses, appear more likely to view signs at marinas and boat ramps as a *very* effective delivery method. Operators of businesses that have been in operation for the median of 13 years or less, compared to operators of older businesses, appear more likely to consider billboards to be a *very* effective delivery method. On the other hand, operators of businesses that have been in operation for more than the median of 13 years appear more likely to public service announcements on TV, radio, or in magazines and newspapers to be *very* effective delivery methods.
- Operators of non-vessel-based businesses, compared to operators of vessel-based businesses, appear more likely to consider information provided as part of boating safety education courses, signs at marinas and boat ramps, public service announcements on TV, news reports on TV, and social media (e.g., Facebook, Twitter, podcasts) to be *very* effective delivery methods.

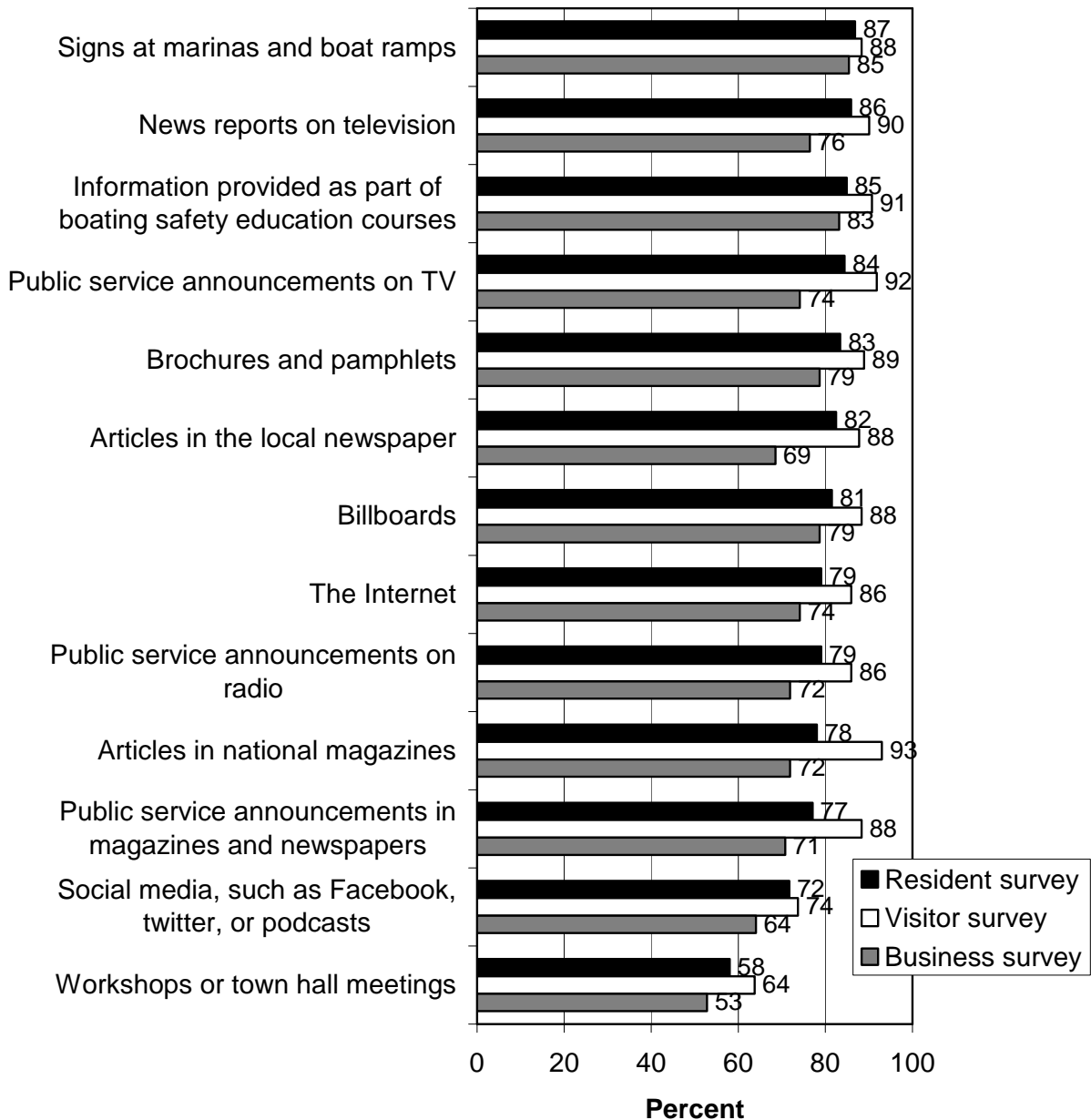
Percent who indicated the following would be very effective methods for educating the public about safely viewing dolphins.



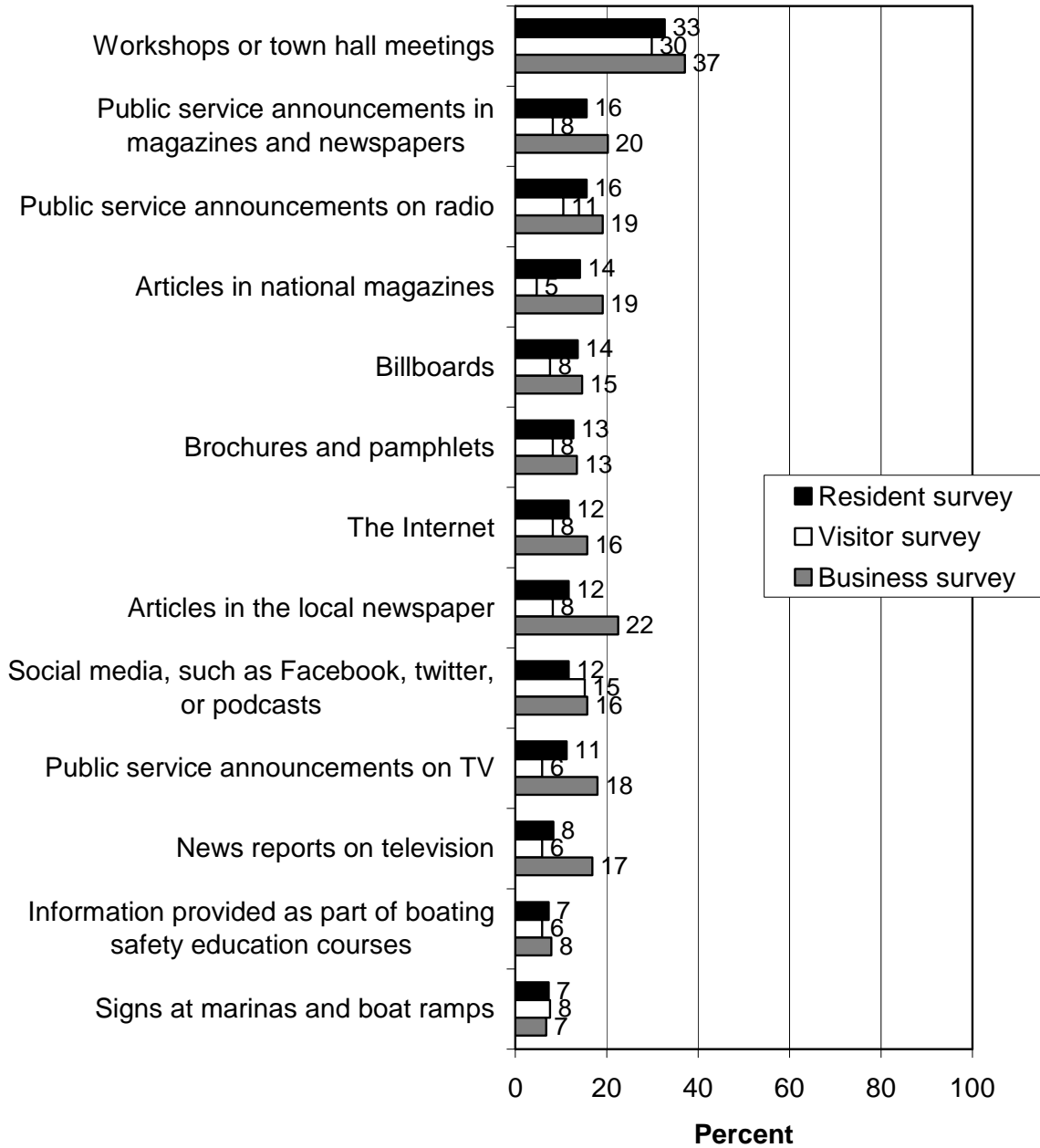
Percent who indicated the following would be very or somewhat effective methods for educating the public about safely viewing dolphins.



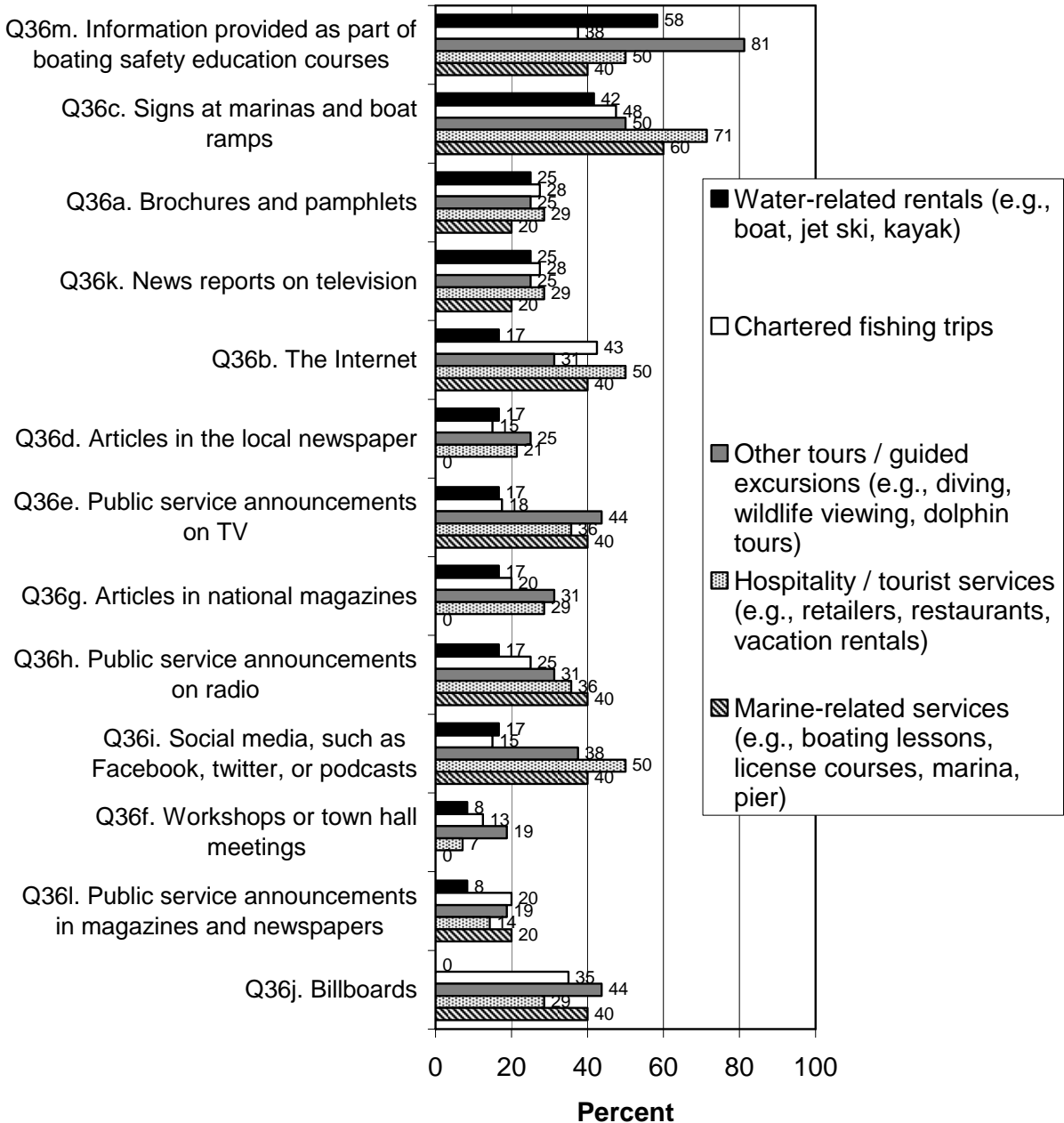
Percent who indicated the following would be very, somewhat, or a little effective methods for educating the public about safely viewing dolphins.



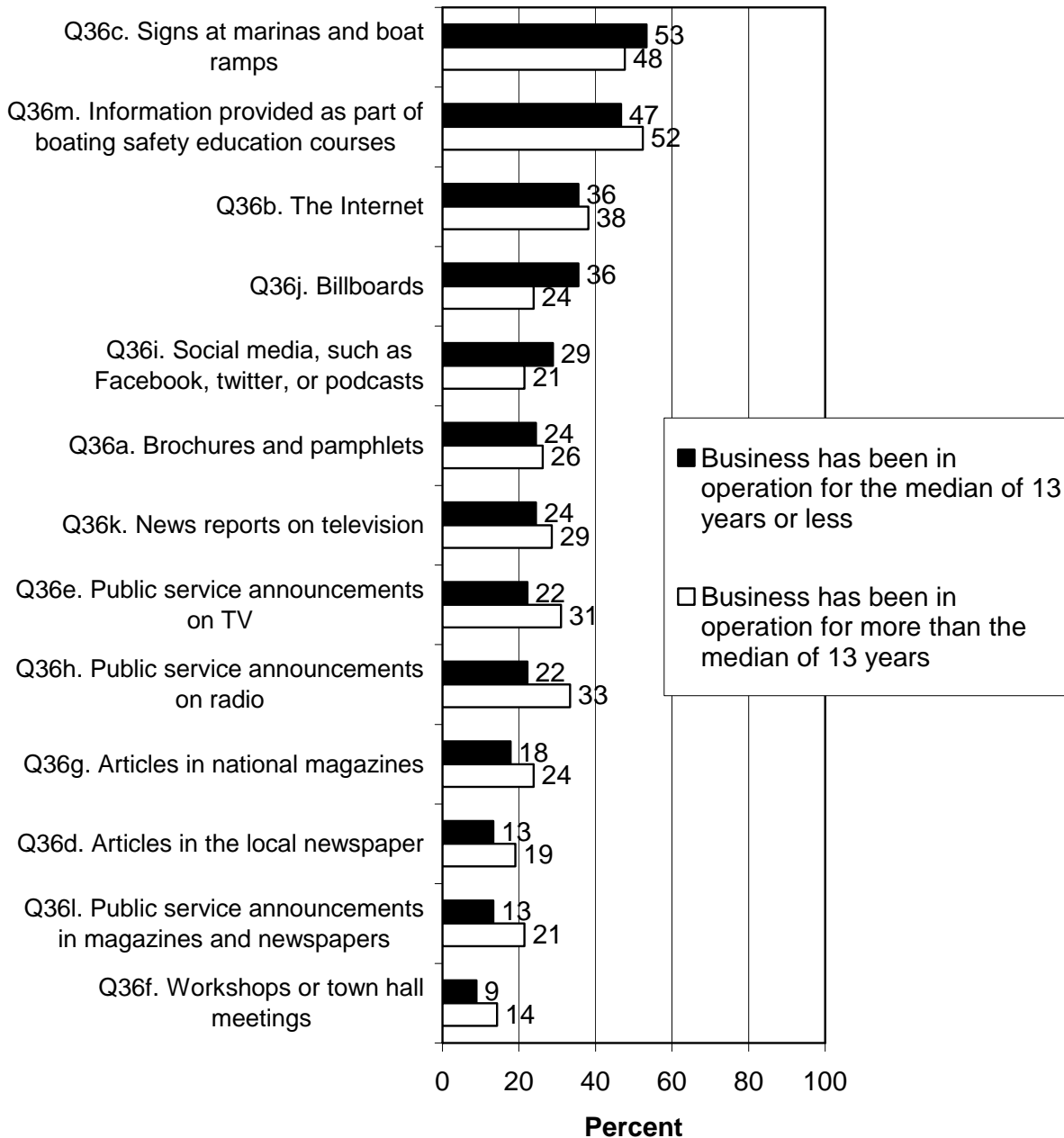
Percent who indicated the following would be not at all effective methods for educating the public about safely viewing dolphins.



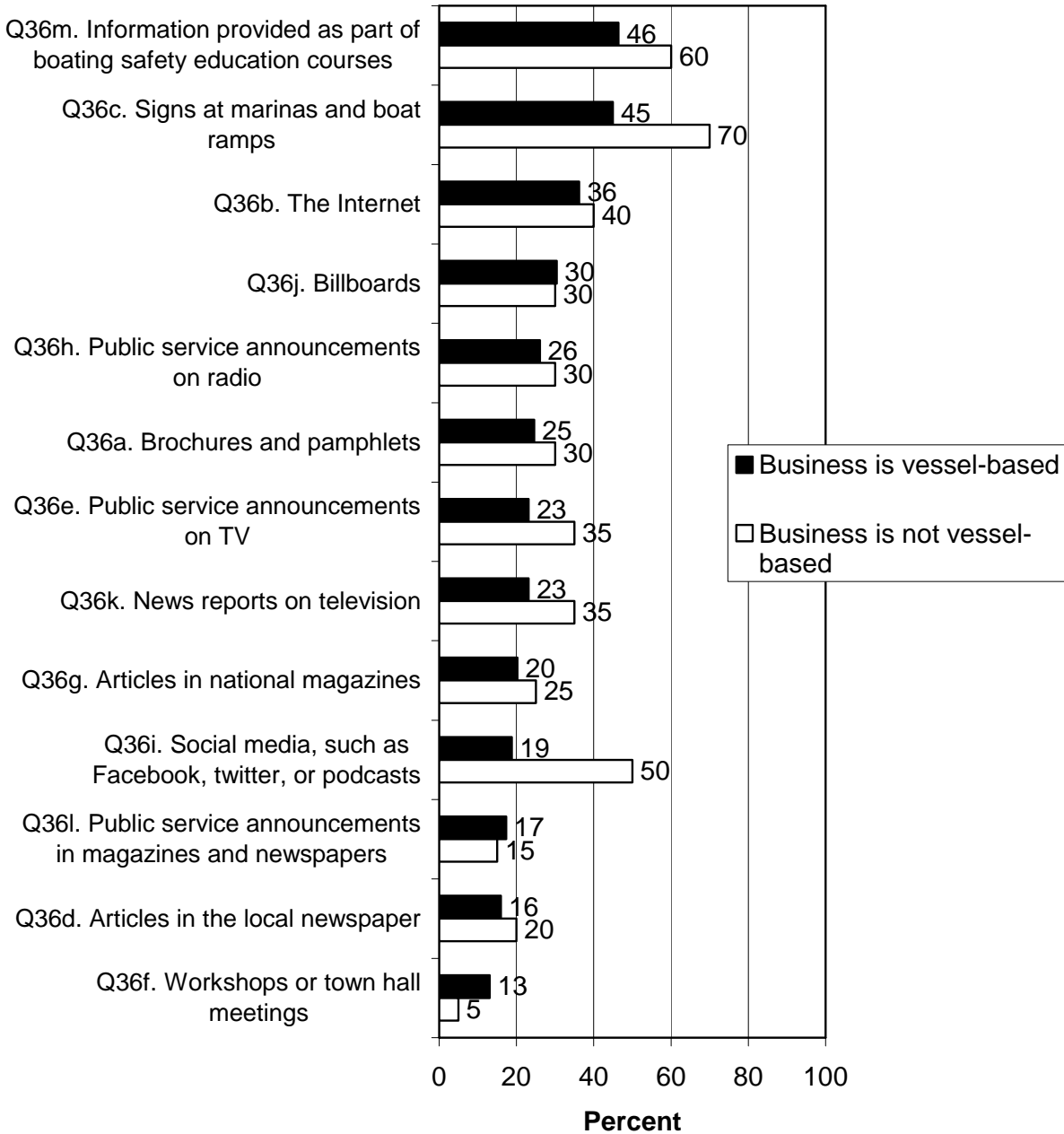
Percent who indicated that the following would be very effective methods for educating the public about safely viewing dolphins. (Business survey)



**Percent who indicated that the following would be very effective methods for educating the public about safely viewing dolphins.
(Business survey)**



**Percent who indicated that the following would be very effective methods for educating the public about safely viewing dolphins.
(Business survey)**



DEMOGRAPHIC AND RESPONDENT DATA

This section presents the results regarding demographic and trip-related data by respondent type. Although many of the survey results from resident and visitor groups are tabulated on the same graphs in this section, the discussions below are separated by respondent type. (Note that the graphs showing commercial business characteristics are separately entirely.)

RESIDENT DEMOGRAPHICS

- The survey of residents found that 15% were members of or had donated to a boating, fishing, recreation, or conservation organization.
 - A graph shows the results of the follow-up question regarding the names of the organizations to which respondents belonged or donated. Miscellaneous national, state, and local organizations predominated (because many of these organizations were named by no more than one or a few respondents, they are shown as combined categories on the graph). Otherwise, the most commonly named organizations were the Audubon Society and the Sierra Club.

- Slightly more than a quarter of the resident sample (29%) owned a boat other than a jet ski at the time of the survey, with 5% owning a jet ski.

- The vast majority of residents surveyed (97%) live in the Panama City metro area year-round.
 - The median number of years lived in the Panama City metro area among residents who live there year-round was 25 years.

- Most respondents in the resident sample were either employed full-time (40%) or retired (36%) at the time of the survey.
 - A graph shows the distribution of resident income levels.

- A small portion of the resident sample (5%) indicated being Hispanic or Latino, with white/Caucasian being the most commonly indicated race/ethnicity category among residents (82% of the sample).

- The vast majority of resident respondents speak English in their household.
- Educational levels of residents are shown; two-thirds of the sample (67%) had completed at least some college.
- The median age among resident respondents was 56 years old. The sample was split fairly evenly by gender.

VISITOR DEMOGRAPHICS AND PANAMA CITY TRIP CHARACTERISTICS

- Nearly a fifth of visitors (18%) were members of or had donated to a boating, fishing, recreation, or conservation organization.
 - A graph shows the results of the follow-up question regarding the names of the organizations to which respondents belonged or donated. The most common responses included miscellaneous conservation organizations (e.g., the Nature Conservancy, Ducks Unlimited) and various government entities (e.g., departments of natural resources or parks departments). Again, because many organizations were named by no more than one or a few respondents, they are shown on the graph as combined categories. Otherwise, the Sierra Club and the National Rifle Association were the most commonly named organizations.
- The most common states of residence among the visitors surveyed were Alabama, Florida, Georgia, Indiana, and Kentucky.
- Similar to the resident sample, most respondents in the visitor sample were either employed full-time (36%) or retired (29%) at the time of the survey.
 - A graph shows the distribution of resident income levels.
- As with the resident sample, a very small percentage of visitors (2%) indicated being Hispanic or Latino, with white/Caucasian being the most commonly indicated race/ethnicity category among visitors (75%).
 - The vast majority of visitors surveyed speak English in their household.

- Educational levels of visitors are shown; most of the sample (71%) had completed at least some college.
- The median age among visitor respondents was 55 years old, with females making up 64% of the sample.

Note: graphs for visitors' Panama City trip characteristics (discussed in the three main bullet points that follow) are shown on pages 182-191.

- About one in ten visitors surveyed (11%) indicated that the trip to Panama City during which they were surveyed was their first trip to the area.
 - The median number of days visitors spent in Panama City during the trip for which they completed a survey was 4 days.
 - Most visitors traveled to the Panama City area by car, truck, or motorcycle (89%), with a smaller percentage visiting by airline (9%).
 - Visitors most commonly stayed in hotels/motels (29%), time-shares or condos (20%), with family or friends (14%), or at resorts (11%). Meanwhile, 17% of the visitor sample did not stay overnight in the Panama City area.
 - The median number of people in visitors' traveling parties was 3 people, with parties most commonly have no children in them age 17 years or younger (62%). Otherwise, about a quarter of the sample (26%) traveled with children age 17 or younger.
- Nearly a fifth of the visitors surveyed (18%) owned a boat other than a jet ski at the time of the survey, with 6% owning a jet ski.
 - A quarter of those who owned a boat and/or a jet ski (24%) said that they generally trailered or brought their boat/jet ski to Panama City when they visited.
- When asked whether the recent Gulf of Mexico oil spill had changed their travel plans, visitors most commonly responded that it did not (59%).
 - Among those who indicated that the oil spill *did* change their travel plans, about half (48%) said that they rescheduled their most recent trip to the Panama City area because of the spill.

CHARACTERISTICS OF COMMERCIAL BUSINESSES SURVEYED

- Chartered fishing trip businesses were the most common type of commercial business to respond to the survey, accounting for 45% of the sample. However, it is important to consider that for this question, business operators chose a category from a “check only one” list of business types, despite the fact that in many cases, their businesses offered more than one type of service. For example, although many chartered fishing trip business operators represented establishments that also offered tours, equipment rentals, or diving/snorkeling excursions, the survey necessitated that they check only one category to best describe their business. Therefore, it should be noted that some overlap exists among the different business types shown on the graph.

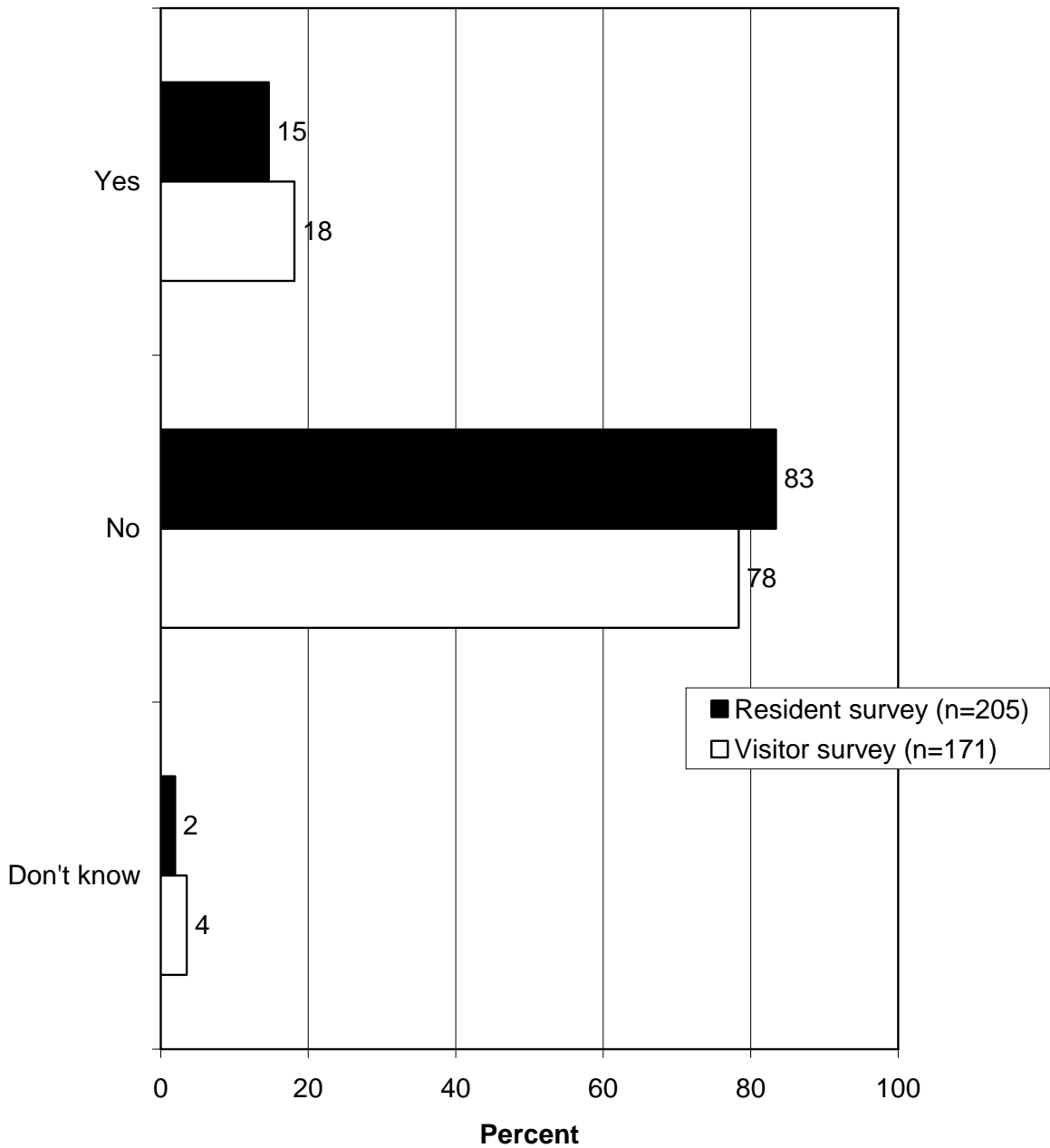
- The median number of years businesses had been in operation at the time of the survey was 13 years.

- More than three-quarters of the businesses surveyed (78%) were vessel-based.
 - Among vessel-based businesses, the median number of vessels owned was two vessels. (More than a third of the sample was made up of businesses that owned just one vessel).
 - A series of graphs in this section shows the vessel guest capacity range among businesses that owned one or several vessels.

- Slightly more than half of the commercial businesses surveyed (55%) operate year-round.
 - The vast majority of business operators (73%) said that the recent Gulf of Mexico oil spill hurt their business *a whole lot*, rather than hurt their business *a little* (4%), *had no effect* (11%), or *helped a whole lot* (3%).

- A third of the businesses surveyed (34%) were members of or had donated to a boating, fishing, recreation, or conservation organization. Of these, the most common types of organizations included boating associations (e.g., American Sailing Association, Boat U.S.) and various conservation organizations (e.g., the Nature Conservancy, Ducks Unlimited).

Q125/Q154. Are you a member of or have you donated to any boating, fishing, recreation, or conservation organizations?



Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—DEMOGRAPHIC: Is a member of or has donated to a boating, fishing, recreation, or conservation organization
PARTICIPATION: Owns a boat or jet ski ($p \leq 0.01$).
PARTICIPATION: Has viewed dolphins on own in the Panama City area in the past 2 years (not as part of a paid wild dolphin viewing tour) ($p \leq 0.01$).
PARTICIPATION: Has participated in wild dolphin-related activities other than in the Panama City area in the past 2 years ($p \leq 0.05$).
INTEREST: Is not at all interested in feeding dolphins in the wild ($p \leq 0.01$).
ATTITUDE: Is very concerned about protecting wild dolphins ($p \leq 0.05$).
DEMOGRAPHIC: Considers himself/herself to be white or Caucasian ($p \leq 0.05$).

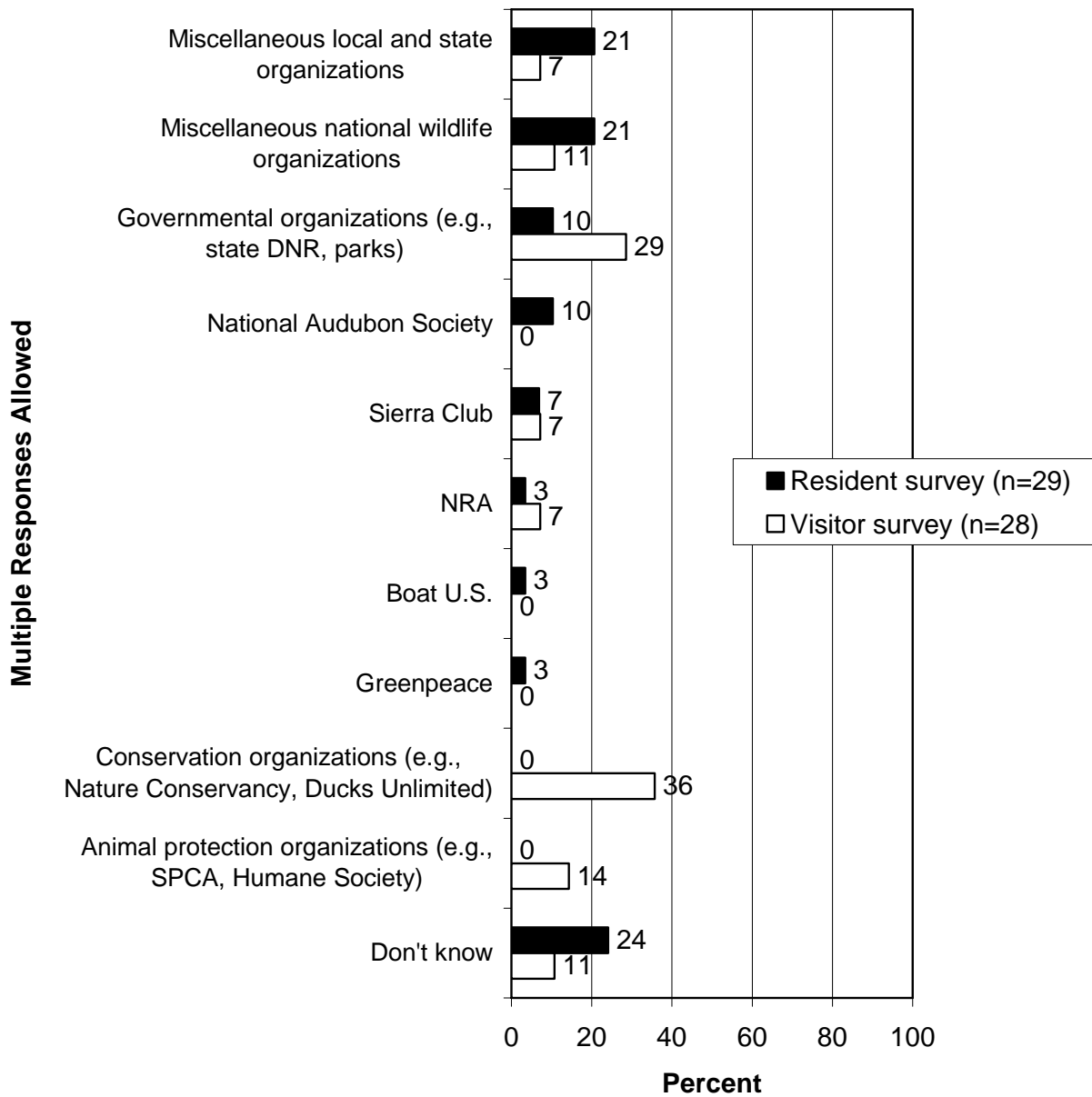
See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

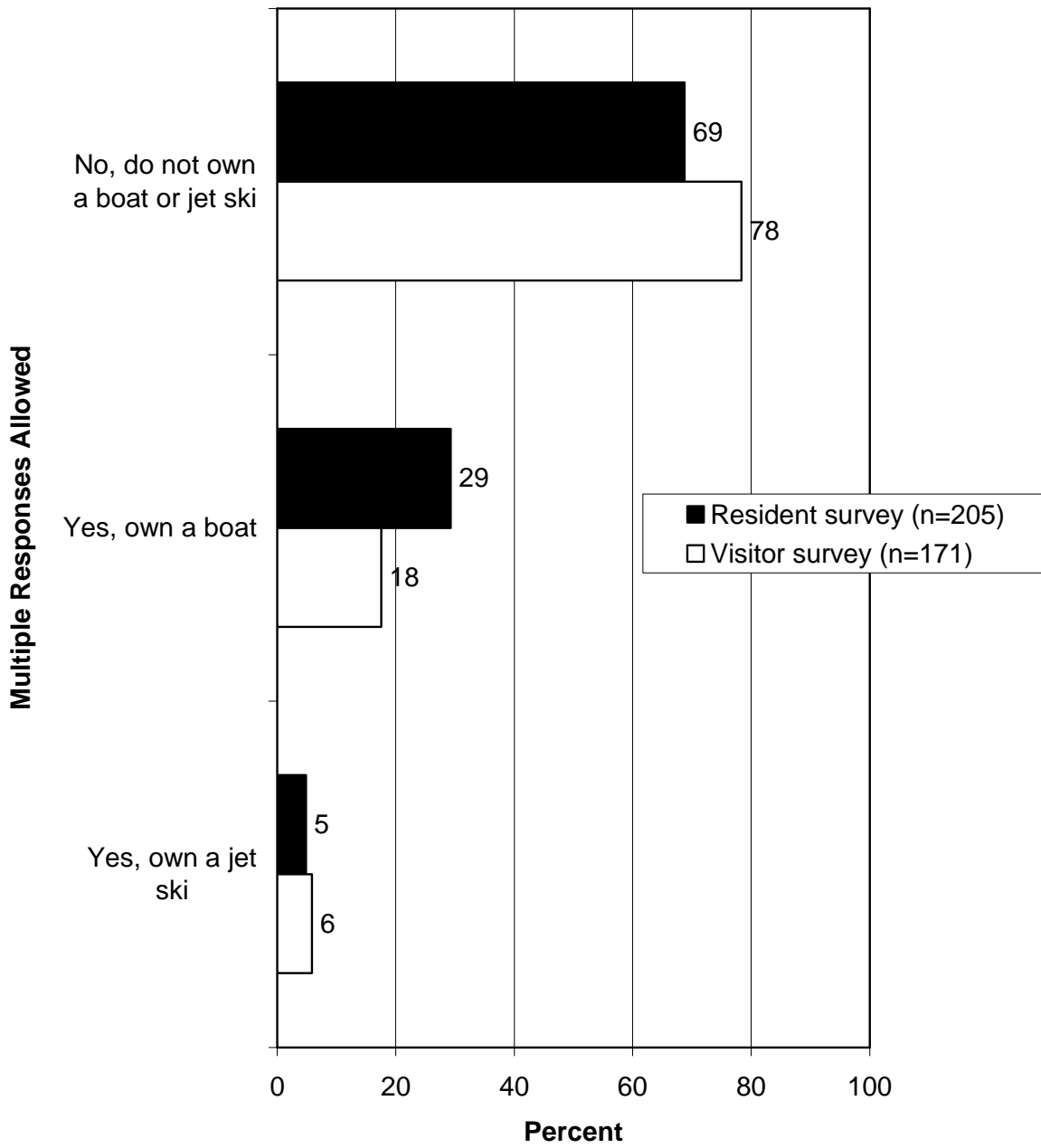
VISITOR SURVEY—DEMOGRAPHIC: Is a member of or has donated to a boating, fishing, recreation, or conservation organization
PARTICIPATION: Has participated in wild dolphin-related activities other than in the Panama City area in the past 2 years ($p \leq 0.05$).
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that cost would be a major factor ($p \leq 0.01$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major factor ($p \leq 0.05$).
ATTITUDE: Is very concerned about protecting wild dolphins ($p \leq 0.05$).
DEMOGRAPHIC: Considers himself/herself to be white or Caucasian ($p \leq 0.01$).
DEMOGRAPHIC: Education level is a bachelor's degree (with or without a higher degree) ($p \leq 0.05$).

See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

Q126/Q155. Which boating, fishing, recreation, or conservation organizations are you a member of or have donated to? (Asked of those who are a member of or have donated to a boating, fishing, recreation, and/or conservation organization.)



Q129/Q150. Do you own a boat or a jet ski?



Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—PARTICIPATION: Owns a boat or jet ski
PARTICIPATION: Has not participated in at least one of the water-based activities listed in the survey in the Panama City area in the past 2 years ($p \leq 0.01$).
PARTICIPATION: Has viewed dolphins on own in the Panama City area in the past 2 years (not as part of a paid wild dolphin viewing tour) ($p \leq 0.01$).
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that cost would be a major or minor factor ($p \leq 0.05$).
KNOWLEDGE: Indicated that feeding dolphins in the wild is illegal and harmful ($p \leq 0.05$).
INFORMATION: Has not heard or read something that makes it seem that it is all right to swim with, touch, or pet dolphins in the wild ($p \leq 0.05$).
DEMOGRAPHIC: Is a member of or has donated to a boating, fishing, recreation, or conservation organization ($p \leq 0.01$).
DEMOGRAPHIC: Considers himself/herself to be white or Caucasian ($p < 0.01$).
DEMOGRAPHIC: Education level is a bachelor's degree (with or without a higher degree) ($p \leq 0.05$).

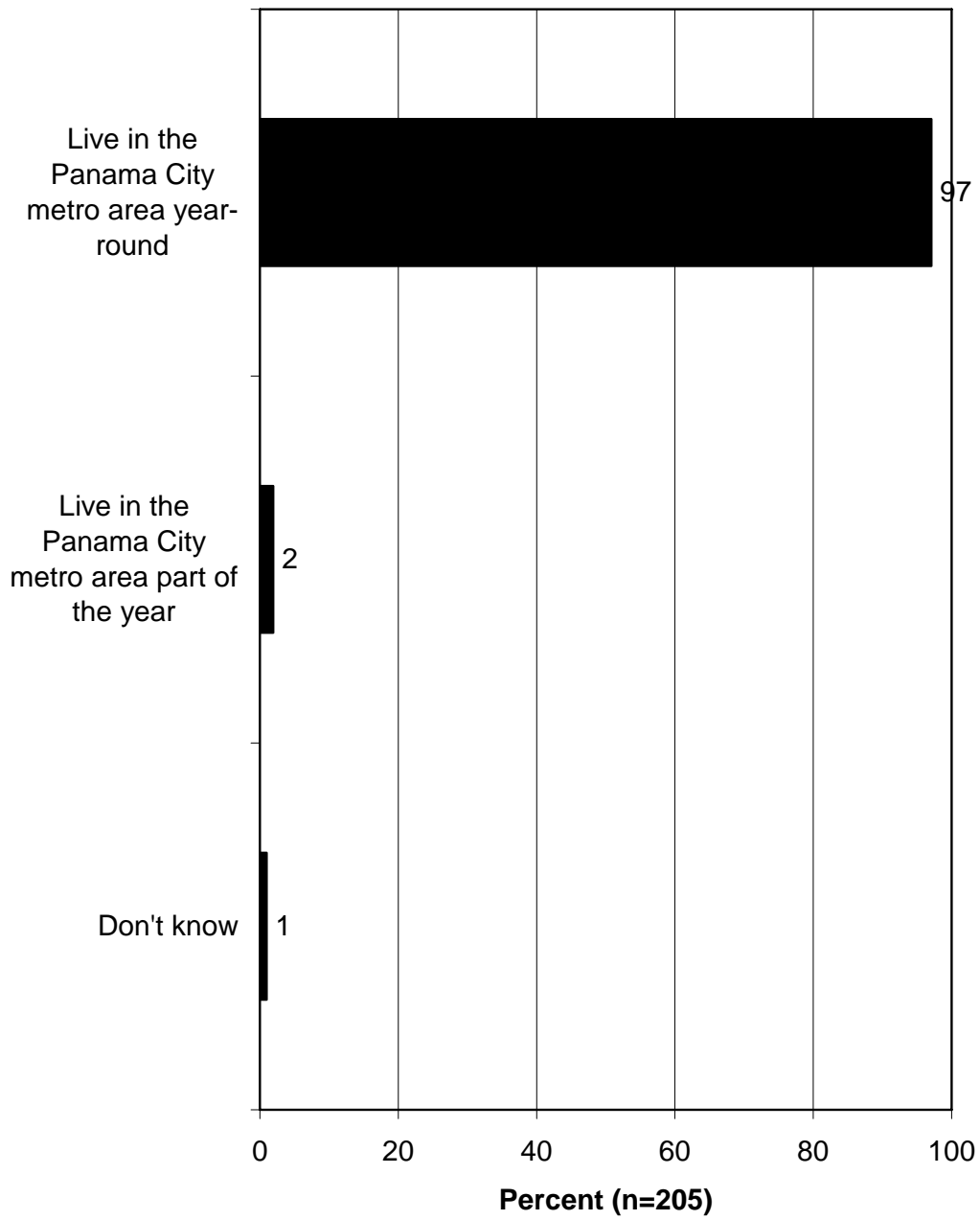
See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

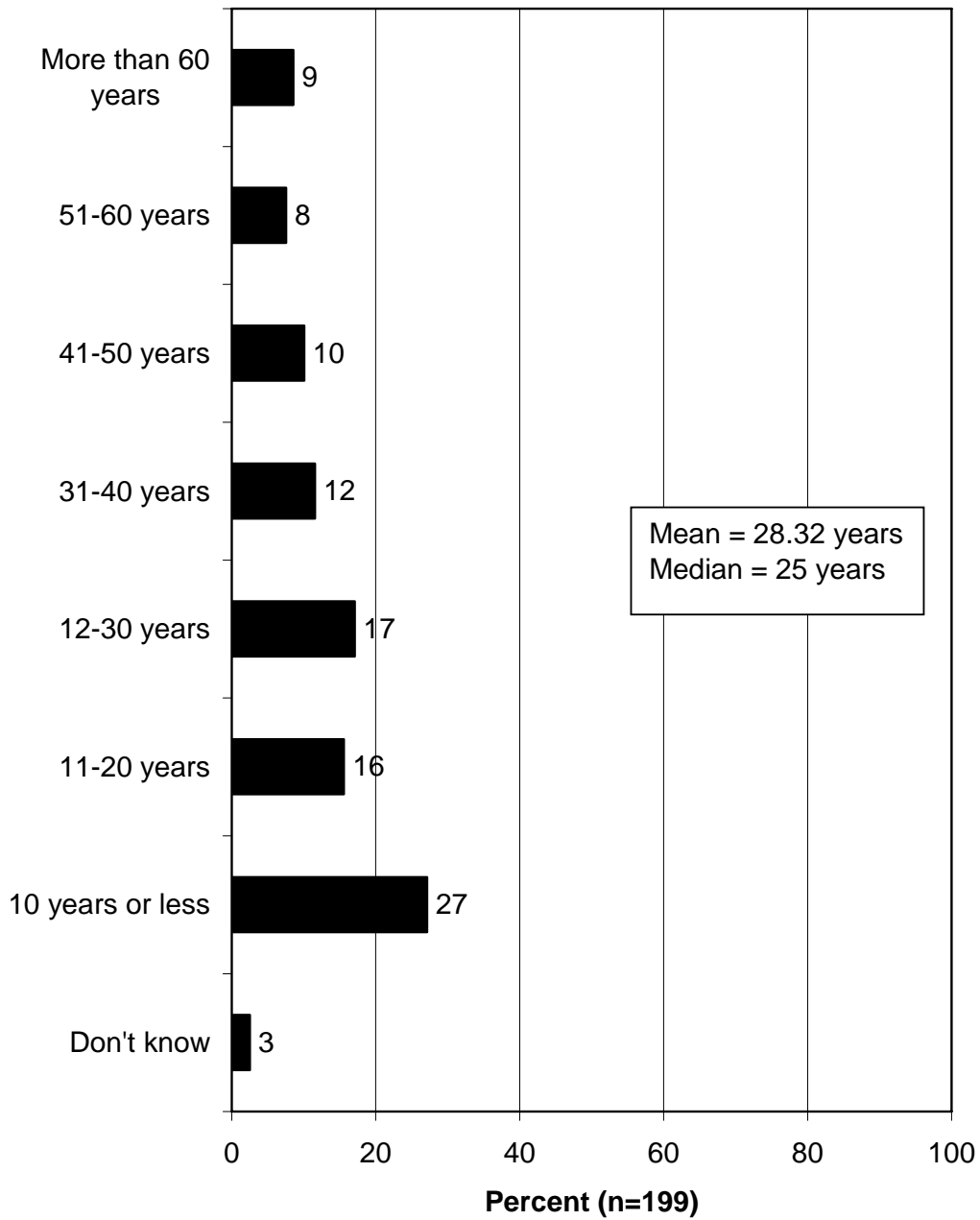
VISITOR SURVEY—PARTICIPATION: Owns a boat or jet ski
PARTICIPATION: Has participated in wild dolphin-related activities other than in the Panama City area in the past 2 years ($p < 0.01$).
PARTICIPATION: Has viewed dolphins on own in the Panama City area in the past 2 years (not as part of a paid wild dolphin viewing tour) ($p < 0.05$).
KNOWLEDGE: Indicated that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is harmful (but may or may not have correctly indicated that it is also illegal) ($p \leq 0.05$).

See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

**Q130. Which best describes your living situation?
(Resident survey)**



**Q133. How long have you lived in the Panama City area? (Asked of those who live in the Panama City metro area year round.)
(Resident survey)**



Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—DEMOGRAPHIC: Has lived in the Panama City area the median number of years (25) or less
PARTICIPATION: Has not participated in at least one of the water-based activities listed in the survey in the Panama City area in the past 2 years ($p \leq 0.001$).
PARTICIPATION: Has viewed dolphins as part of a paid wild dolphin viewing tour in the Panama City area in the past 2 years ($p \leq 0.05$).
DEMOGRAPHIC: Is younger than 55 years old ($p \leq 0.001$).
DEMOGRAPHIC: Is younger than 65 years old ($p \leq 0.001$).
DEMOGRAPHIC: Indicated being employed ($p \leq 0.001$).
DEMOGRAPHIC: Considers himself/herself to be white or Caucasian ($p < 0.05$).

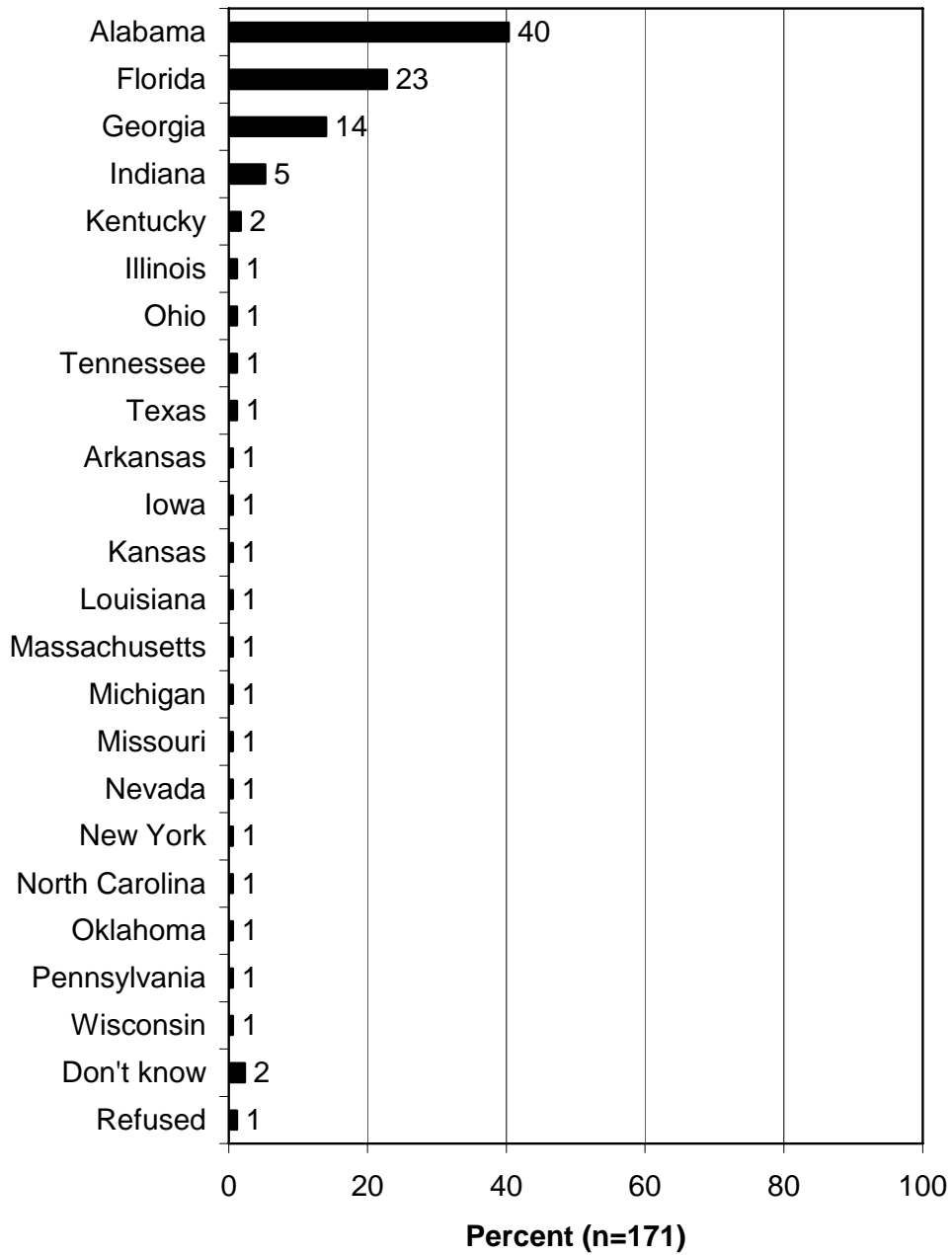
See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

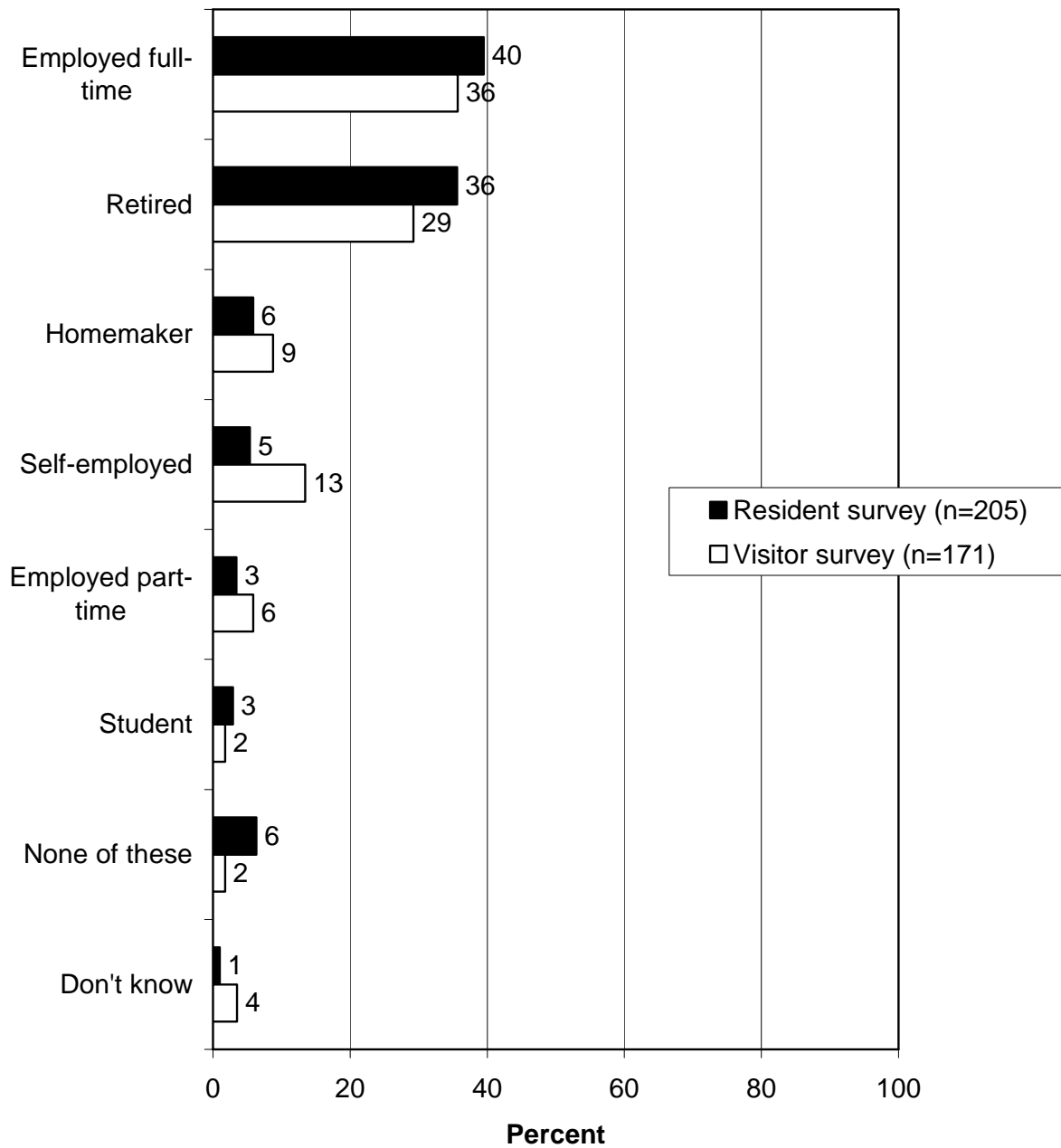
RESIDENT SURVEY—DEMOGRAPHIC: Has lived in the Panama City area longer than the median number of years (25)
PARTICIPATION: Has participated in at least one of the water-based activities listed in the survey in the Panama City area in the past 2 years ($p \leq 0.001$).
PARTICIPATION: Has not viewed dolphins as part of a paid wild dolphin viewing tour in the Panama City area in the past 2 years ($p \leq 0.05$).
DEMOGRAPHIC: Is 55 years old or older ($p \leq 0.001$).
DEMOGRAPHIC: Is 65 years old or older ($p \leq 0.001$).
DEMOGRAPHIC: Did not indicate being employed ($p \leq 0.001$).
DEMOGRAPHIC: Does not consider himself/herself to be white or Caucasian ($p \leq 0.05$).

See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

**Q157. In what state or province do you live?
(Visitor survey)**



Q136/Q158. Which of the following best describes your employment status?



Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—DEMOGRAPHIC: Indicated being employed
PARTICIPATION: Has not participated in at least one of the water-based activities listed in the survey in the Panama City area in the past 2 years ($p \leq 0.001$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major or minor factor ($p \leq 0.01$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major factor ($p \leq 0.01$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says cost would be a major or minor factor ($p \leq 0.05$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says cost would be a major factor ($p \leq 0.05$).
KNOWLEDGE: Indicated that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is harmful (but may or may not have correctly indicated that it is also illegal) ($p \leq 0.01$).
KNOWLEDGE: Indicated that feeding dolphins in the wild is harmful (but may or may not have correctly indicated that it is also illegal) ($p \leq 0.05$).
KNOWLEDGE: Indicated that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is illegal and harmful ($p \leq 0.05$).
INFORMATION: Got information about feeding dolphins from a public service announcement ($p \leq 0.001$).
INFORMATION: Got information about swimming with, touching, or petting dolphins from a public service announcement ($p \leq 0.05$).
DEMOGRAPHIC: Is younger than 55 years old ($p \leq 0.001$).
DEMOGRAPHIC: Is younger than 65 years old ($p \leq 0.001$).
DEMOGRAPHIC: Has lived in the Panama City area the median number of years (25) or less ($p \leq 0.001$).
DEMOGRAPHIC: Education level is a bachelor's degree (with or without a higher degree) ($p \leq 0.05$).

See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

VISITOR SURVEY—DEMOGRAPHIC: Indicated being employed
KNOWLEDGE: Indicated that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is harmful (but may or may not have correctly indicated that it is also illegal) ($p \leq 0.01$).
KNOWLEDGE: Indicated that feeding dolphins in the wild is illegal and harmful ($p \leq 0.05$).
KNOWLEDGE: Indicated that feeding dolphins in the wild is harmful (but may or may not have correctly indicated that it is also illegal) ($p \leq 0.05$).
DEMOGRAPHIC: Is younger than 65 years old ($p \leq 0.001$).
DEMOGRAPHIC: Is younger than 55 years old ($p \leq 0.001$).
DEMOGRAPHIC: Is male ($p \leq 0.01$).

See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—DEMOGRAPHIC: Did not indicate being employed
PARTICIPATION: Has participated in at least one of the water-based activities listed in the survey in the Panama City area in the past 2 years ($p \leq 0.001$).
INTEREST: Is not at all interested in closely interacting with dolphins in the wild ($p \leq 0.01$).
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that proximity to dolphins (how close he/she can get) would be a major or minor factor ($p \leq 0.01$).
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that proximity to dolphins (how close he/she can get) would be a major factor ($p \leq 0.01$).
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that cost would be a major or minor factor ($p \leq 0.05$).
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that cost would be a major factor ($p \leq 0.05$).
KNOWLEDGE: Did not indicate that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is harmful ($p \leq 0.01$).
KNOWLEDGE: Did not indicate that feeding dolphins in the wild is harmful ($p \leq 0.05$).
KNOWLEDGE: Did not indicate that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is illegal and harmful ($p \leq 0.05$).
INFORMATION: Did not get information about feeding dolphins from a public service announcement ($p \leq 0.001$).
INFORMATION: Did not get information about swimming with, touching, or petting dolphins from a public service announcement ($p \leq 0.05$).
DEMOGRAPHIC: Is 55 years old or older ($p \leq 0.001$).
DEMOGRAPHIC: Is 65 years old or older ($p \leq 0.001$).
DEMOGRAPHIC: Has lived in the Panama City area longer than the median number of years (25) ($p \leq 0.001$).

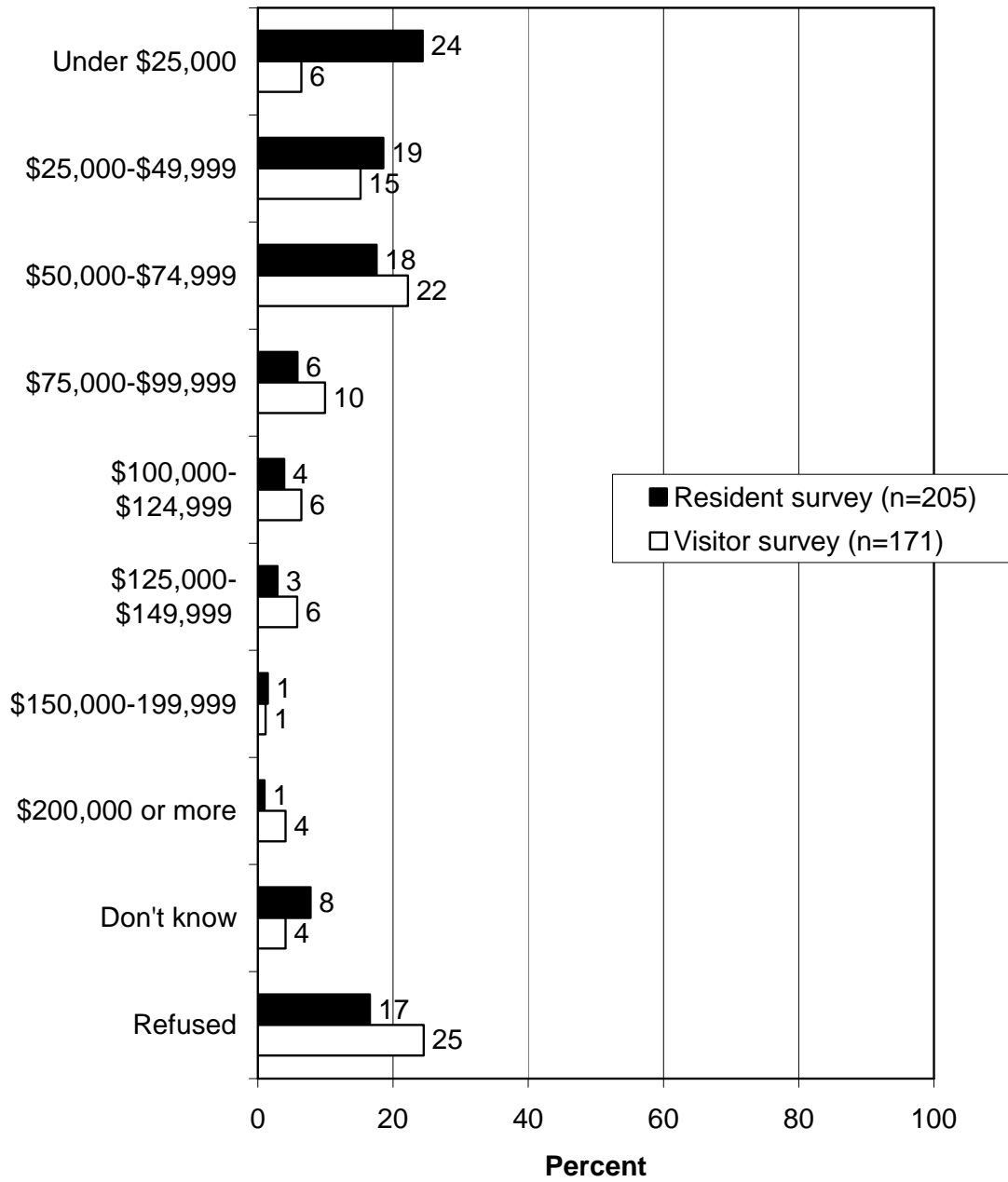
See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

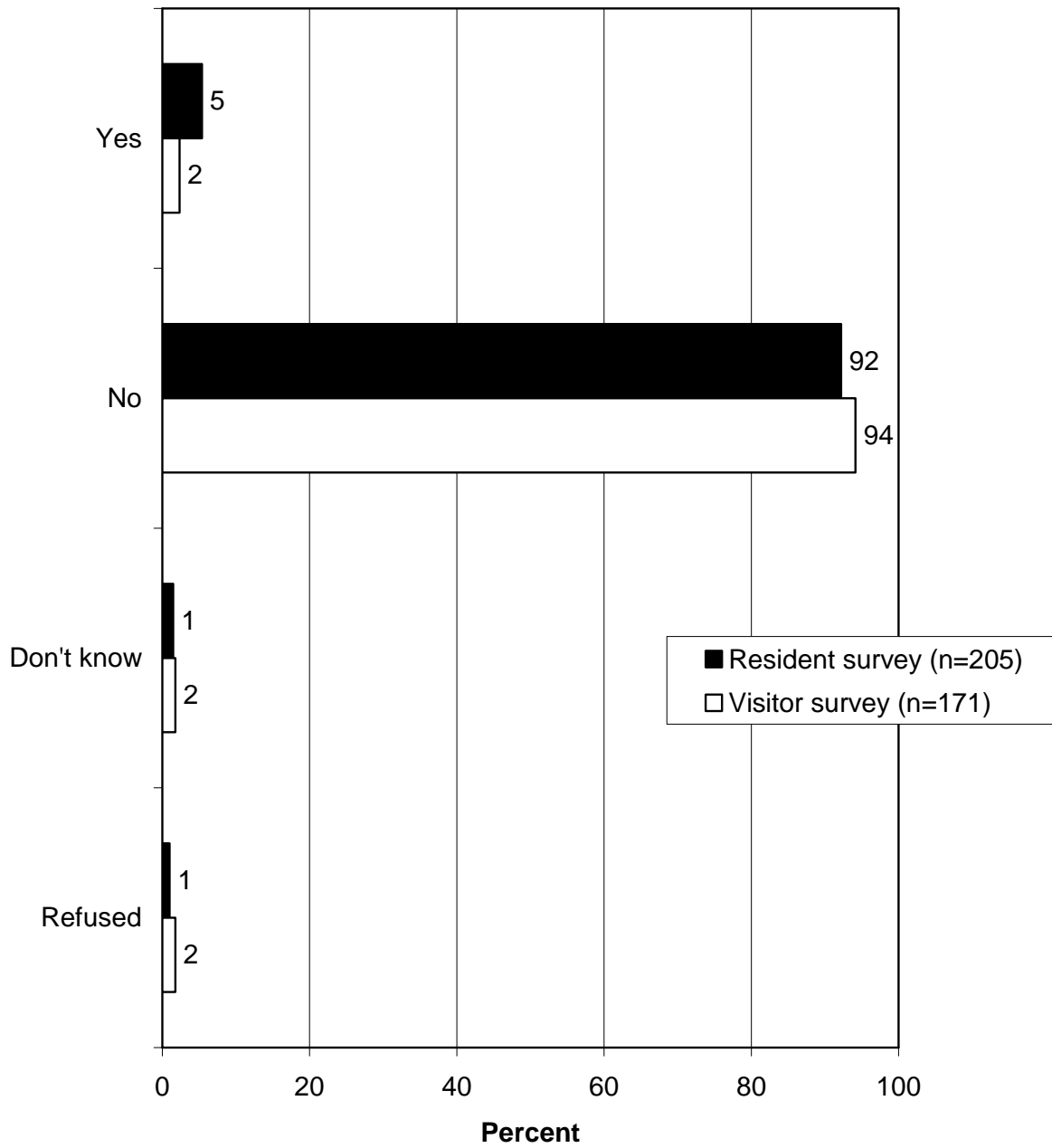
VISITOR SURVEY—DEMOGRAPHIC: Did not indicate being employed
KNOWLEDGE: Did not indicate that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is harmful ($p \leq 0.01$).
KNOWLEDGE: Did not indicate that feeding dolphins in the wild is illegal and harmful ($p \leq 0.05$).
KNOWLEDGE: Did not indicate that feeding dolphins in the wild is harmful ($p \leq 0.05$).
DEMOGRAPHIC: Is 65 years old or older ($p \leq 0.001$).
DEMOGRAPHIC: Is 55 years old or older ($p \leq 0.001$).
DEMOGRAPHIC: Is female ($p \leq 0.01$).

See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

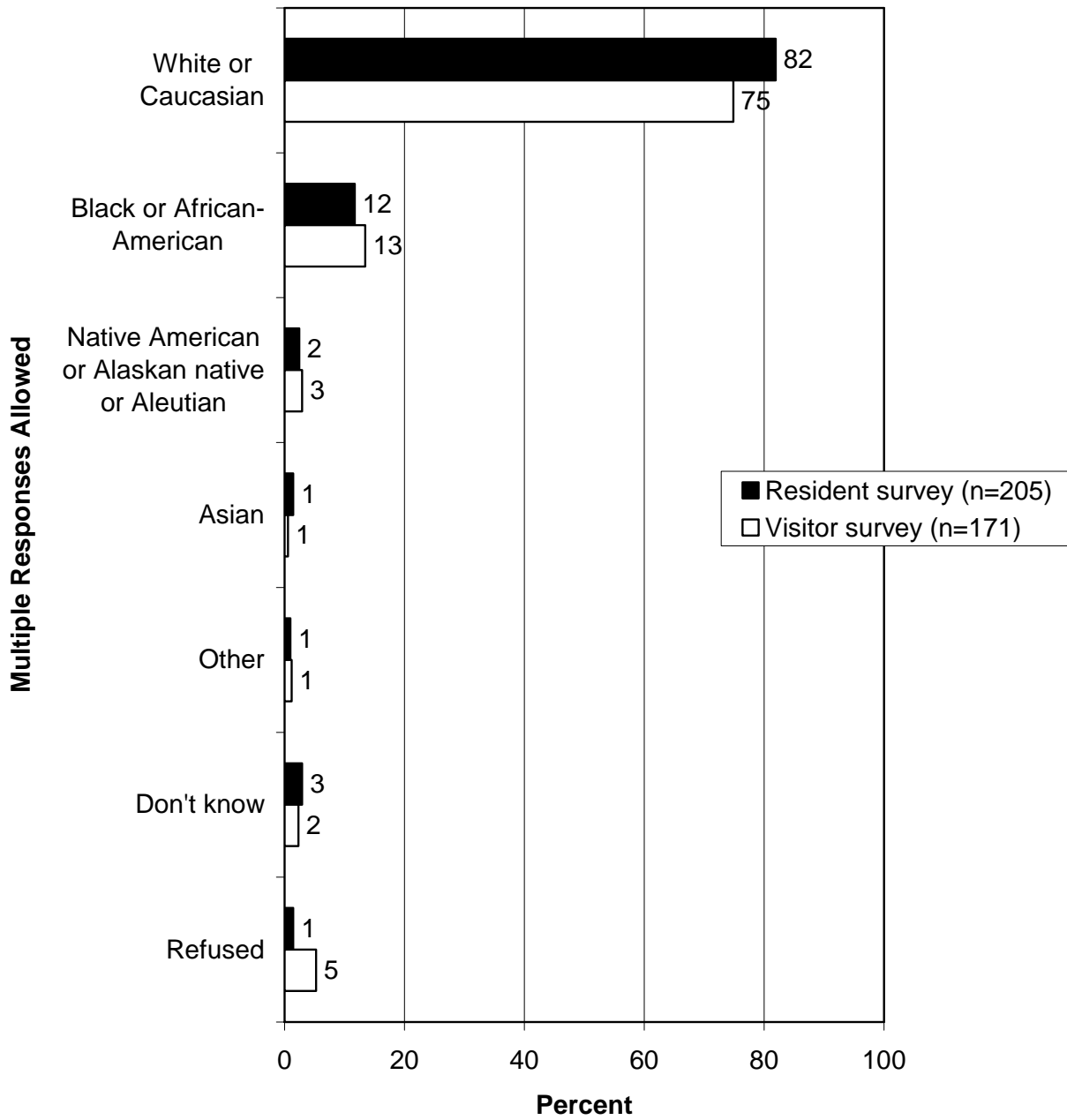
Q137/Q159. Which of these categories best describes your total household income before taxes last year?



Q138/Q160. Are you Hispanic or Latino?



Q141/Q163. What races or ethnic backgrounds do you consider yourself? Please mention all that apply.



Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—DEMOGRAPHIC: Considers himself/herself to be white or Caucasian
PARTICIPATION: Has not participated in at least one of the water-based activities listed in the survey in the Panama City area in the past 2 years ($p \leq 0.001$).
PARTICIPATION: Owns a boat or jet ski ($p \leq 0.01$).
DEMOGRAPHIC: Has lived in the Panama City area the median number of years (25) or less ($p \leq 0.05$).
DEMOGRAPHIC: Is a member of or has donated to a boating, fishing, recreation, or conservation organization ($p \leq 0.05$).

See page 14, “Interpreting the Nonparametric Analysis Results,” for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

VISITOR SURVEY—DEMOGRAPHIC: Considers himself/herself to be white or Caucasian
KNOWLEDGE: Indicated that feeding dolphins in the wild is harmful (but may or may not have correctly indicated that it is also illegal) ($p < 0.05$).
DEMOGRAPHIC: Education level is a bachelor’s degree (with or without a higher degree) ($p \leq 0.01$).
DEMOGRAPHIC: Is a member of or has donated to a boating, fishing, recreation, or conservation organization ($p \leq 0.01$).

See page 14, “Interpreting the Nonparametric Analysis Results,” for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—DEMOGRAPHIC: Does not consider himself/herself to be white or Caucasian
PARTICIPATION: Has participated in at least one of the water-based activities listed in the survey in the Panama City area in the past 2 years ($p < 0.001$).
PARTICIPATION: Does not own a boat or jet ski ($p \leq 0.01$).
DEMOGRAPHIC: Has lived in the Panama City area longer than the median number of years (25) ($p \leq 0.05$).
DEMOGRAPHIC: Is not a member of nor has donated to a boating, fishing, recreation, or conservation organization ($p \leq 0.05$).

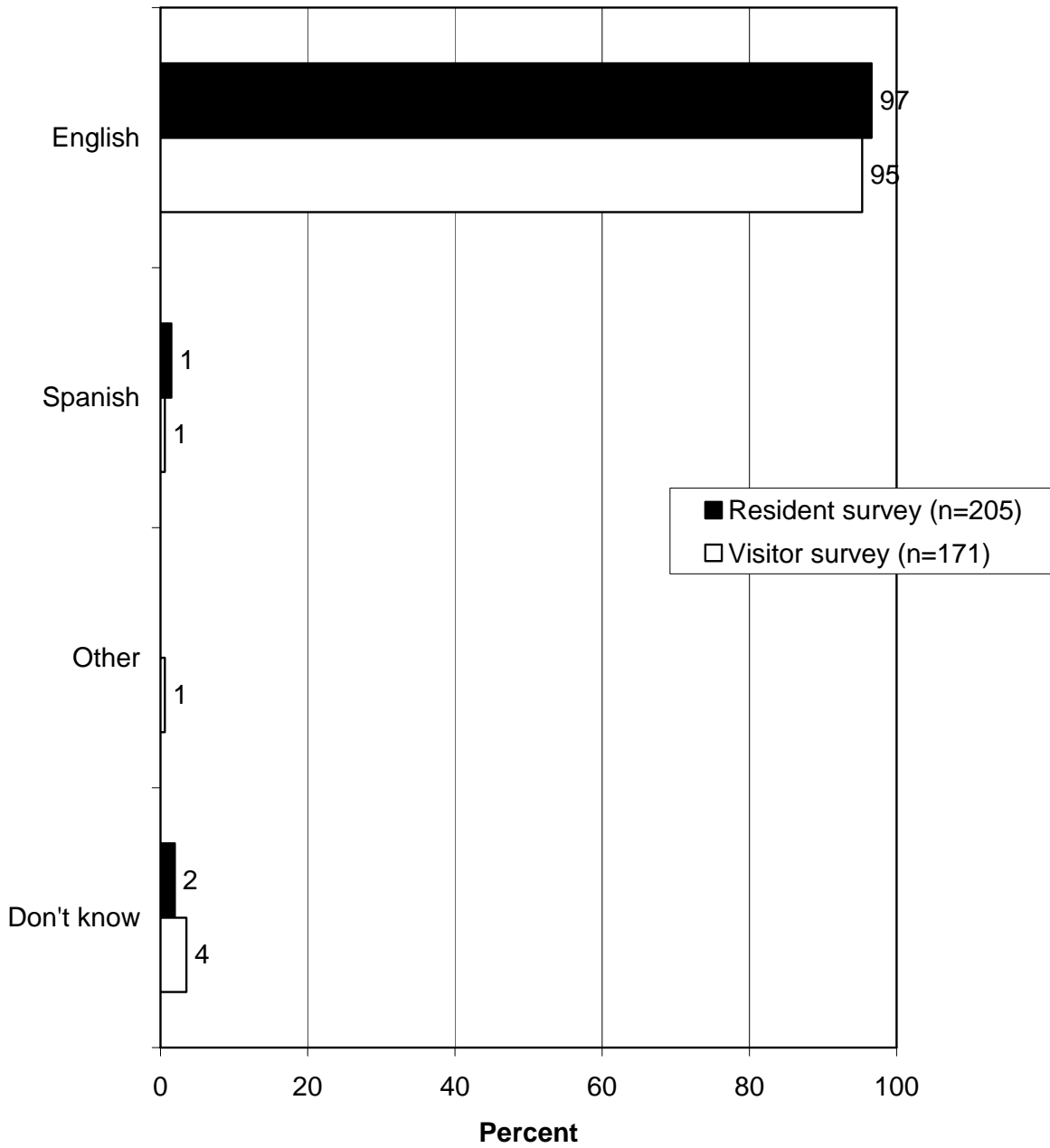
See page 14, “Interpreting the Nonparametric Analysis Results,” for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

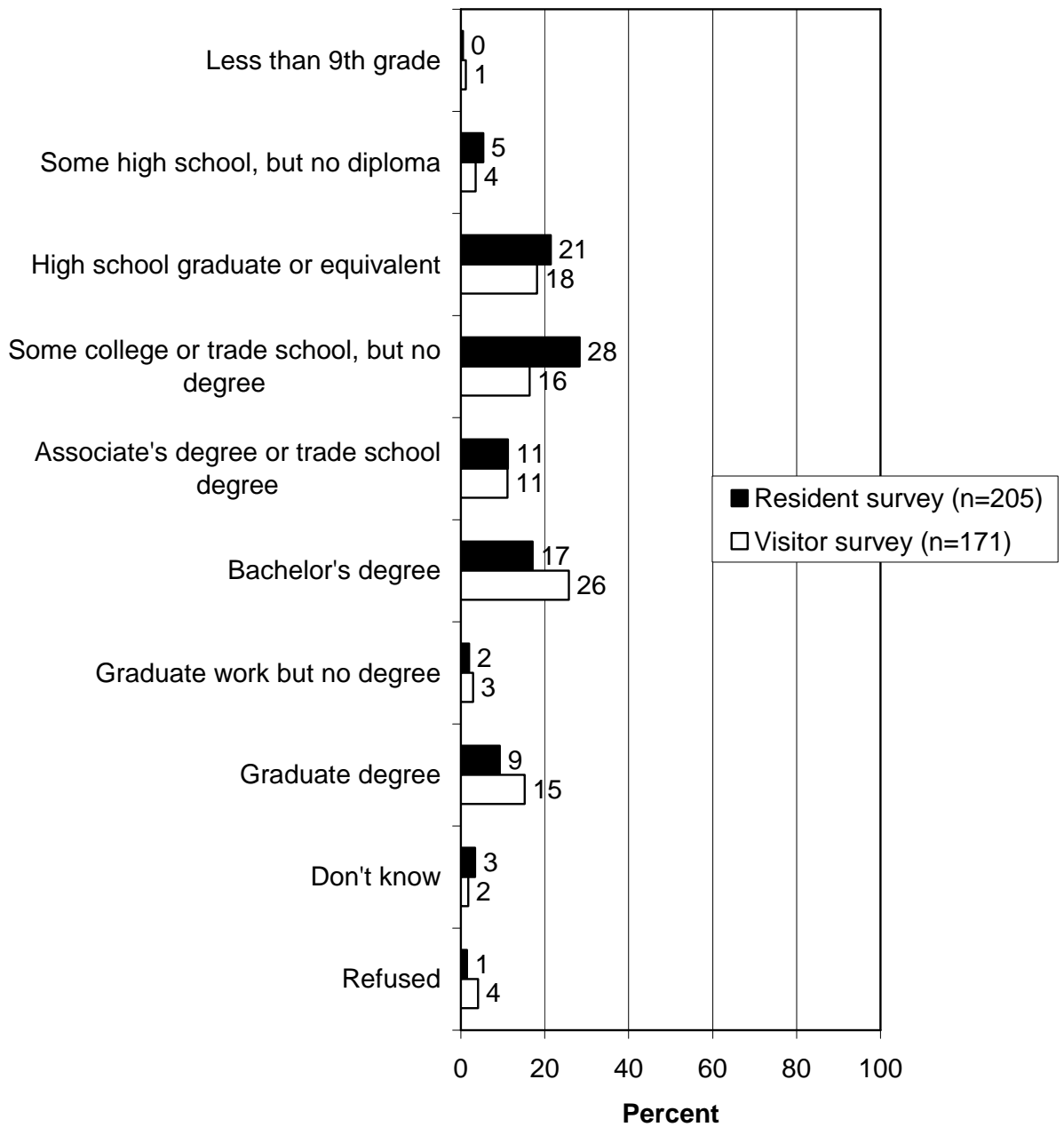
VISITOR SURVEY—DEMOGRAPHIC: Does not consider himself/herself to be white or Caucasian
KNOWLEDGE: Did not indicate that feeding dolphins in the wild is harmful ($p \leq 0.05$).
DEMOGRAPHIC: Is not a member of nor has donated to a boating, fishing, recreation, or conservation organization ($p \leq 0.01$).

See page 14, “Interpreting the Nonparametric Analysis Results,” for an explanation of how to read the nonparametric analysis tabulations.

Q143/Q165. What language does your household primarily speak?



Q145/Q167. What is the highest level of education you have attained?



Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—DEMOGRAPHIC: Education level is a bachelor's degree (with or without a higher degree)
PARTICIPATION: Owns a boat or jet ski ($p \leq 0.05$).
KNOWLEDGE: Indicated that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is illegal and harmful ($p \leq 0.05$).
KNOWLEDGE: Indicated that feeding dolphins in the wild is harmful (but may or may not have correctly indicated that it is also illegal) ($p \leq 0.05$).
KNOWLEDGE: Indicated that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is harmful (but may or may not have correctly indicated that it is also illegal) ($p \leq 0.05$).
INFORMATION: Did not get information about swimming with, touching, or petting dolphins from a public service announcement ($p \leq 0.05$).
DEMOGRAPHIC: Indicated being employed ($p \leq 0.05$).
DEMOGRAPHIC: Is male ($p \leq 0.05$).

See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

VISITOR SURVEY—DEMOGRAPHIC: Education level is a bachelor's degree (with or without a higher degree)
PARTICIPATION: Visited the Panama City area for pleasure ($p \leq 0.05$).
DEMOGRAPHIC: Considers himself/herself to be white or Caucasian ($p \leq 0.01$).
DEMOGRAPHIC: Is a member of or has donated to a boating, fishing, recreation, or conservation organization ($p \leq 0.05$).

See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—DEMOGRAPHIC: Education level is no higher than associate's or trade school degree
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major factor ($p \leq 0.05$).
KNOWLEDGE: Did not indicate that swimming with, touching, or petting dolphins in the wild in a way that disturbs them is illegal and harmful ($p \leq 0.05$).
INFORMATION: Got information about swimming with, touching, or petting dolphins from a public service announcement ($p \leq 0.05$).

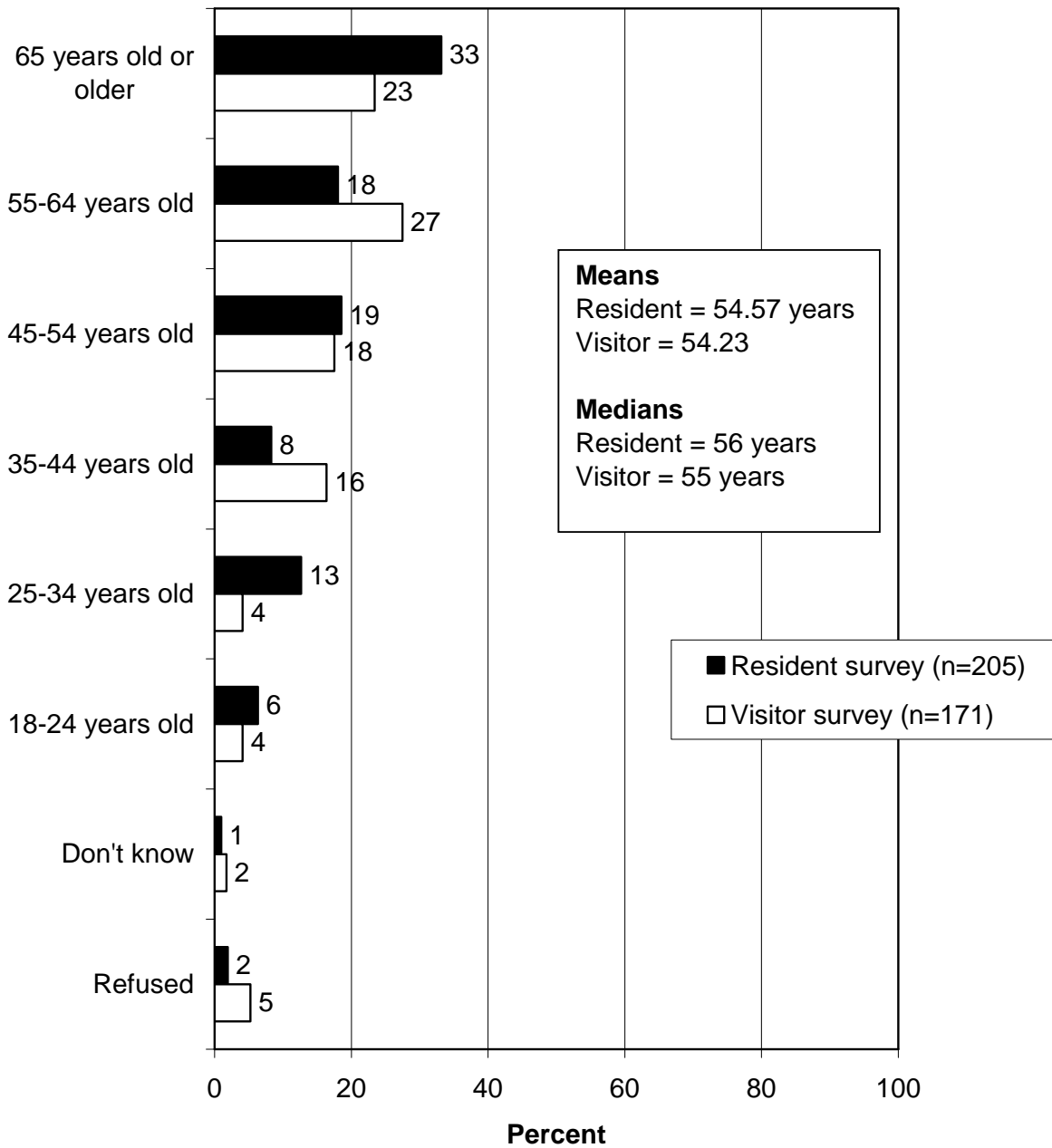
See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

VISITOR SURVEY—DEMOGRAPHIC: Education level is no higher than associate's or trade school degree
PARTICIPATION: Did not indicate visiting the Panama City area for pleasure ($p \leq 0.05$).

See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

Q146/Q168. Respondent's age.



Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—DEMOGRAPHIC: Is 55 years old or older
PARTICIPATION: Has participated in at least one of the water-based activities listed in the survey in the Panama City area in the past 2 years ($p \leq 0.001$).
INTEREST: Is not at all interested in closely interacting with dolphins in the wild ($p \leq 0.001$).
INTEREST: Is not at all interested in feeding dolphins in the wild ($p \leq 0.05$).
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that cost would be a major or minor factor ($p \leq 0.001$).
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that proximity to dolphins (how close he/she can get) would be a major or minor factor ($p \leq 0.01$).
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that proximity to dolphins (how close he/she can get) would be a major factor ($p \leq 0.01$).
KNOWLEDGE: Did not indicate that feeding dolphins in the wild is harmful ($p \leq 0.05$).
DEMOGRAPHIC: Is 65 years old or older ($p \leq 0.001$).
DEMOGRAPHIC: Did not indicate being employed ($p \leq 0.001$).
DEMOGRAPHIC: Has lived in the Panama City area longer than the median number of years (25) ($p \leq 0.001$).

See page 14, “Interpreting the Nonparametric Analysis Results,” for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

VISITOR SURVEY—DEMOGRAPHIC: Is 55 years old or older
PARTICIPATION: Has participated in at least one of the water-based activities listed in the survey in the Panama City area in the past 2 years ($p \leq 0.05$).
INTEREST: Is not at all interested in feeding dolphins in the wild ($p \leq 0.05$).
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that cost would be a major factor ($p \leq 0.05$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major factor ($p \leq 0.05$).
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that cost would be a major or minor factor ($p \leq 0.05$).
DEMOGRAPHIC: Is 65 years old or older ($p \leq 0.001$).
DEMOGRAPHIC: Did not indicate being employed ($p < 0.001$).

See page 14, “Interpreting the Nonparametric Analysis Results,” for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—DEMOGRAPHIC: Is younger than 55 years old
PARTICIPATION: Has not participated in at least one of the water-based activities listed in the survey in the Panama City area in the past 2 years ($p \leq 0.001$).
INTEREST: Is very interested in closely interacting with dolphins in the wild ($p \leq 0.001$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says cost would be a major or minor factor ($p \leq 0.001$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major or minor factor ($p \leq 0.01$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says proximity to dolphins (how close he/she can get) would be a major factor ($p \leq 0.01$).
KNOWLEDGE: Indicated that feeding dolphins in the wild is harmful (but may or may not have correctly indicated that it is also illegal) ($p \leq 0.05$).
DEMOGRAPHIC: Is younger than 65 years old ($p \leq 0.001$).
DEMOGRAPHIC: Indicated being employed ($p \leq 0.001$).
DEMOGRAPHIC: Has lived in the Panama City area the median number of years (25) or less ($p \leq 0.001$).

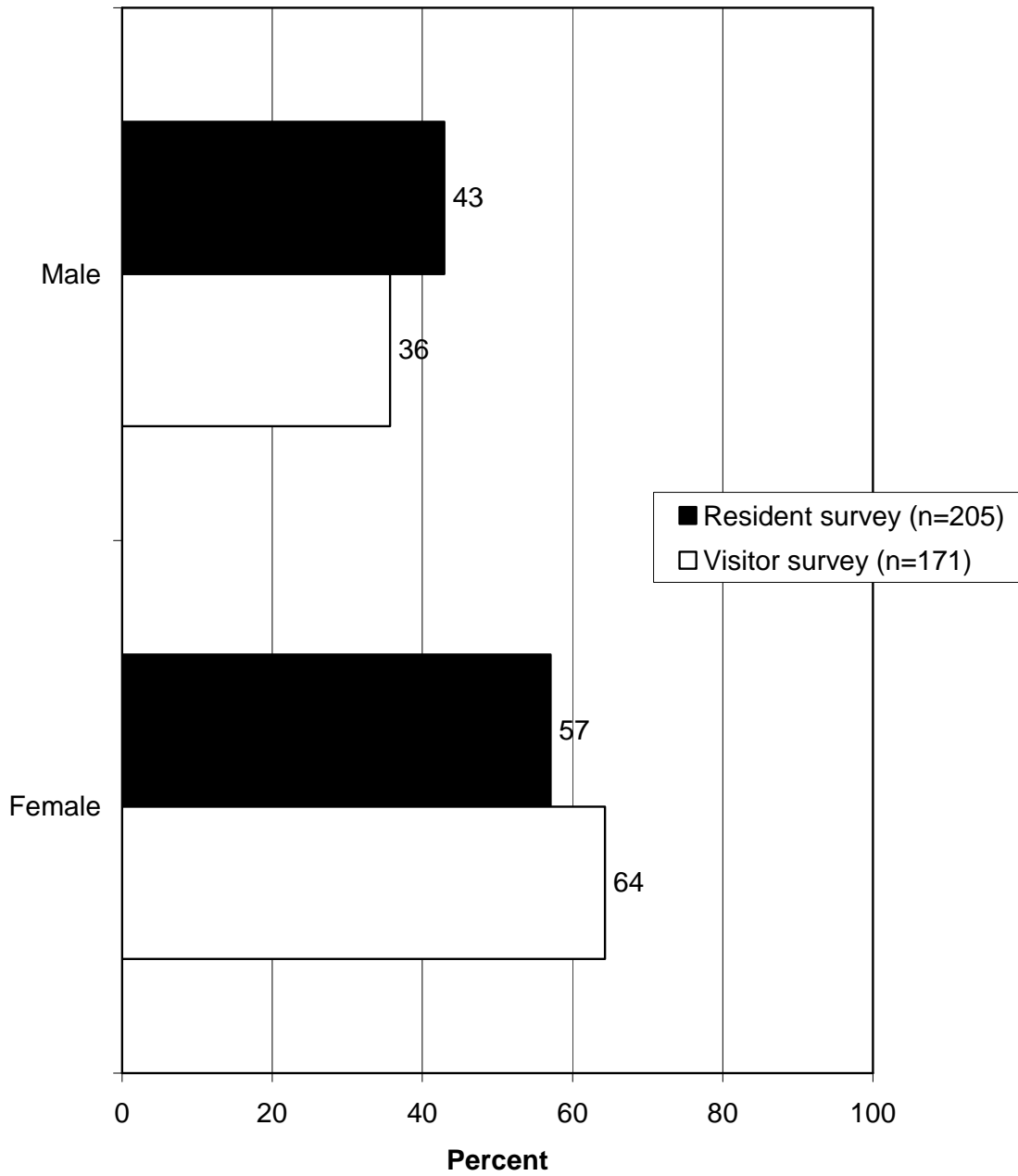
See page 14, “Interpreting the Nonparametric Analysis Results,” for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

VISITOR SURVEY—DEMOGRAPHIC: Is younger than 55 years old
PARTICIPATION: Has not participated in at least one of the water-based activities listed in the survey in the Panama City area in the past 2 years ($p \leq 0.05$).
INTEREST: Is very interested in closely interacting with dolphins in the wild ($p \leq 0.01$).
INTEREST: Is very interested in feeding dolphins in the wild ($p \leq 0.05$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says cost would be a major factor ($p \leq 0.05$).
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that provision of educational information about dolphins would be a major factor ($p \leq 0.05$).
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says cost would be a major or minor factor ($p \leq 0.05$).
DEMOGRAPHIC: Is younger than 65 years old ($p \leq 0.001$).
DEMOGRAPHIC: Indicated being employed ($p \leq 0.001$).

See page 14, “Interpreting the Nonparametric Analysis Results,” for an explanation of how to read the nonparametric analysis tabulations.

Q153/Q174. Respondent's gender (observed by interviewer; not asked).



Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—DEMOGRAPHIC: Is male
ATTITUDE: Does not say, in decision regarding which company to use for dolphin viewing trip, that provision of educational information about dolphins would be a major factor ($p \leq 0.05$).
DEMOGRAPHIC: Education level is a bachelor's degree (with or without a higher degree) ($p \leq 0.05$).

See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

VISITOR SURVEY—DEMOGRAPHIC: Is male
PARTICIPATION: Has not viewed dolphins as part of a paid wild dolphin viewing tour in the Panama City area in the past 2 years ($p \leq 0.01$).
PARTICIPATION: Has not participated in wild dolphin-related activities other than in the Panama City area in the past 2 years ($p \leq 0.05$).
INTEREST: Is not at all interested in feeding dolphins in the wild ($p < 0.05$).
DEMOGRAPHIC: Indicated being employed ($p \leq 0.01$).

See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

RESIDENT SURVEY—DEMOGRAPHIC: Is female
ATTITUDE: In decision regarding which company to use for dolphin viewing trip, says provision of educational information about dolphins would be a major factor ($p \leq 0.05$).

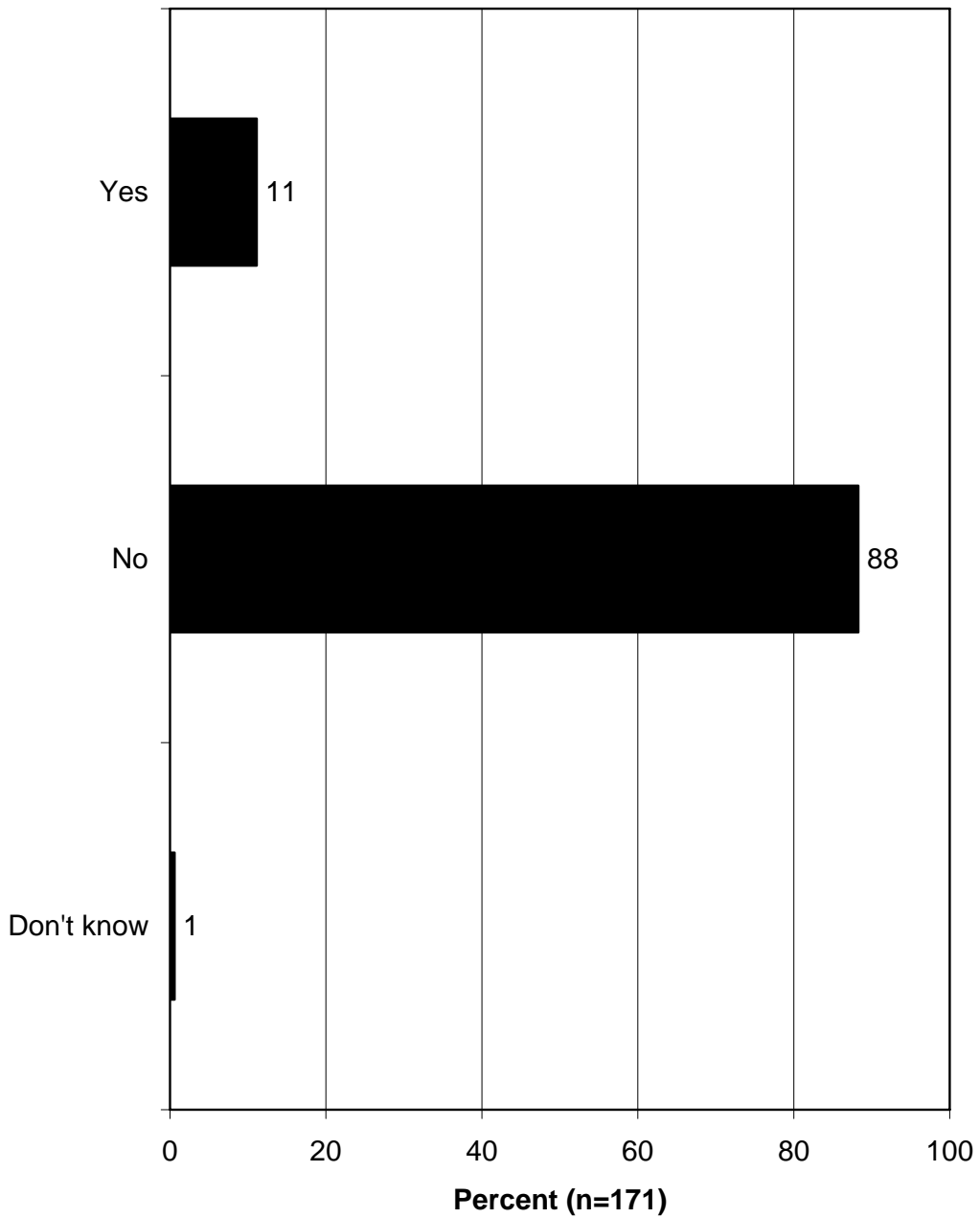
See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

Correlations to the Characteristic or Opinion Shown in the Top Row

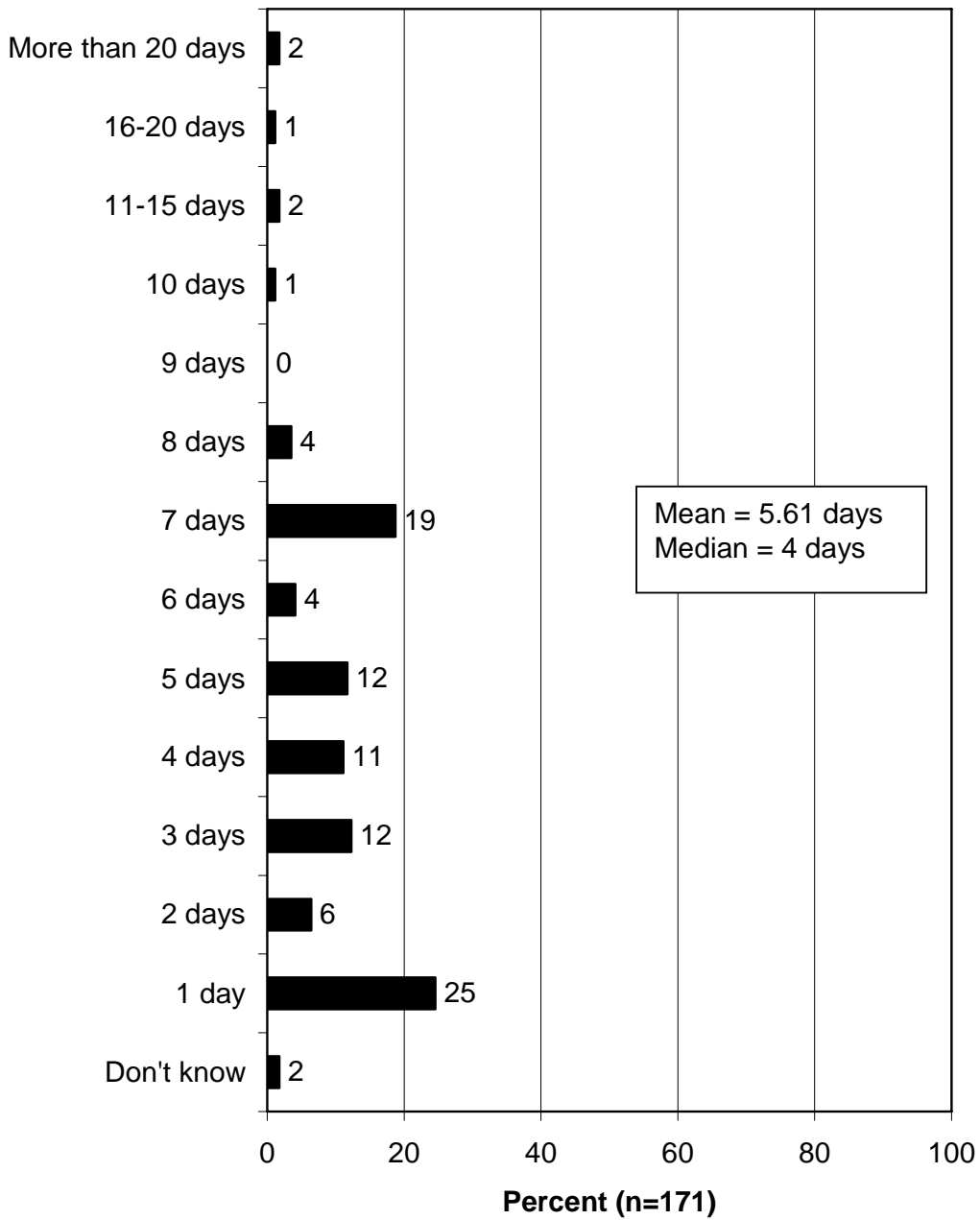
VISITOR SURVEY—DEMOGRAPHIC: Is female
PARTICIPATION: Has viewed dolphins as part of a paid wild dolphin viewing tour in the Panama City area in the past 2 years ($p \leq 0.01$).
PARTICIPATION: Has participated in wild dolphin-related activities other than in the Panama City area in the past 2 years ($p < 0.05$).
DEMOGRAPHIC: Did not indicate being employed ($p < 0.01$).

See page 14, "Interpreting the Nonparametric Analysis Results," for an explanation of how to read the nonparametric analysis tabulations.

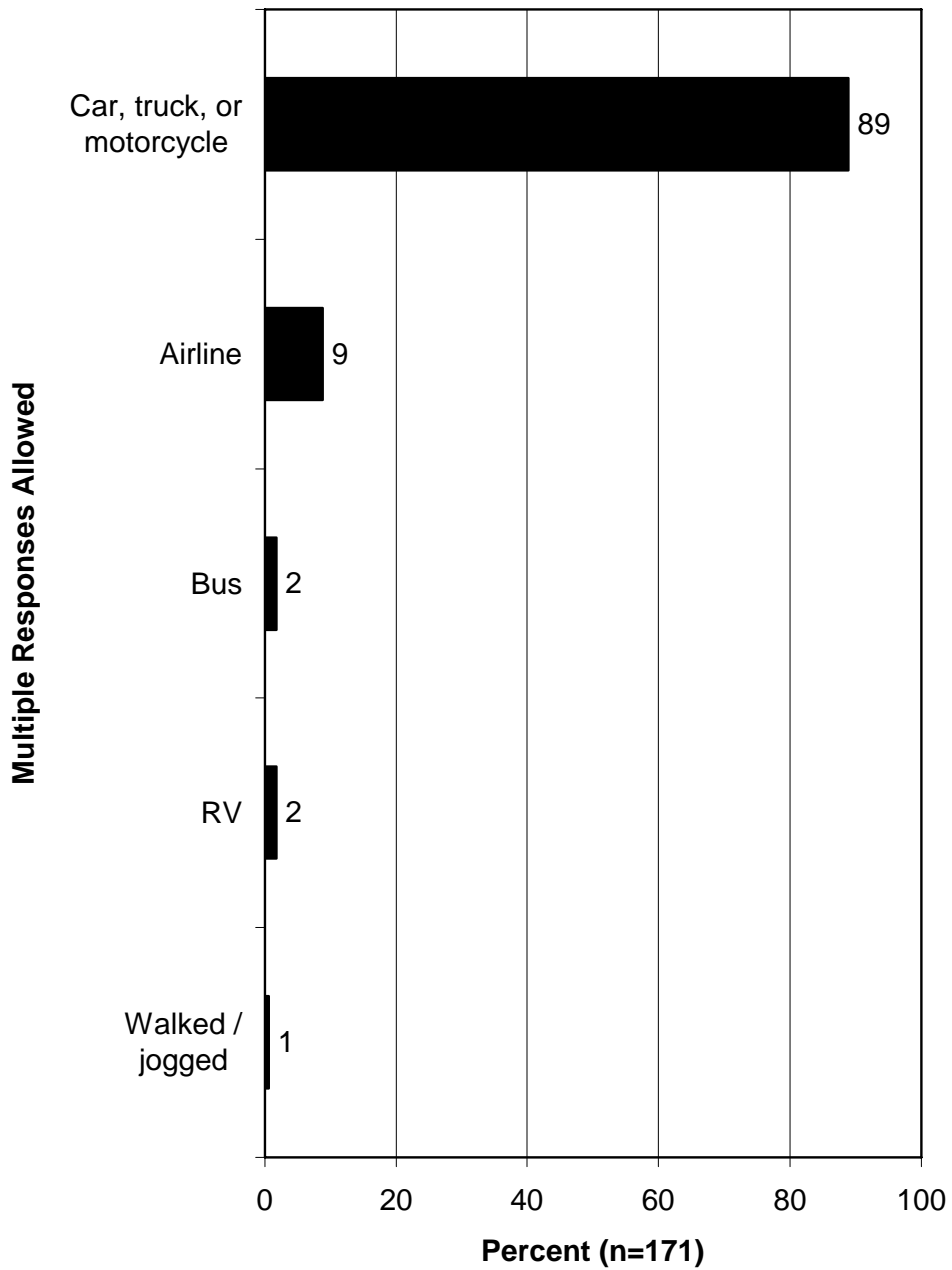
**Q90. Is this trip / Was your last trip to the Panama City area your first visit to the area?
(Visitor survey)**



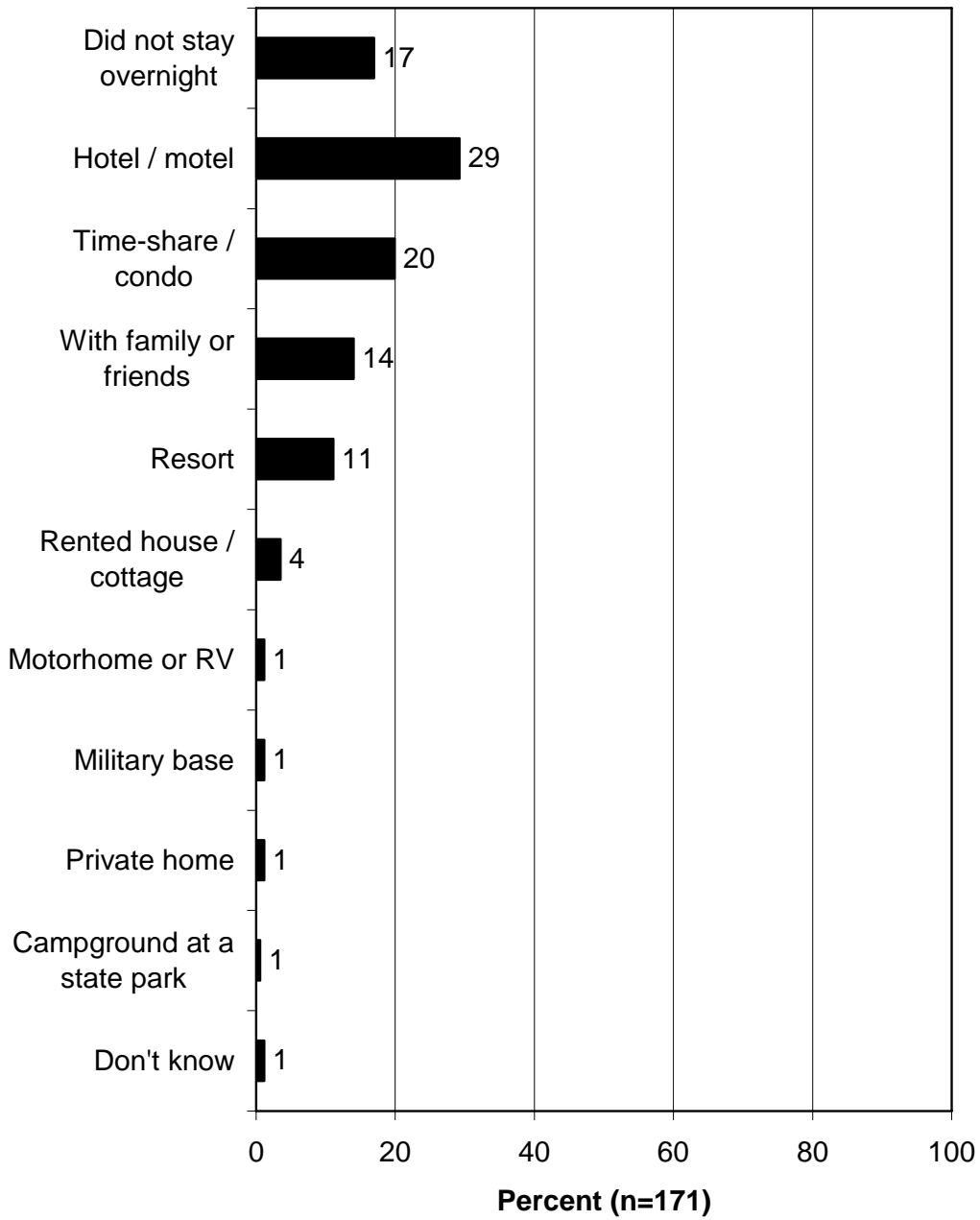
**Q91. How many days total will you be in Panama City on this trip / were you in Panama City during your last trip?
(Visitor survey)**



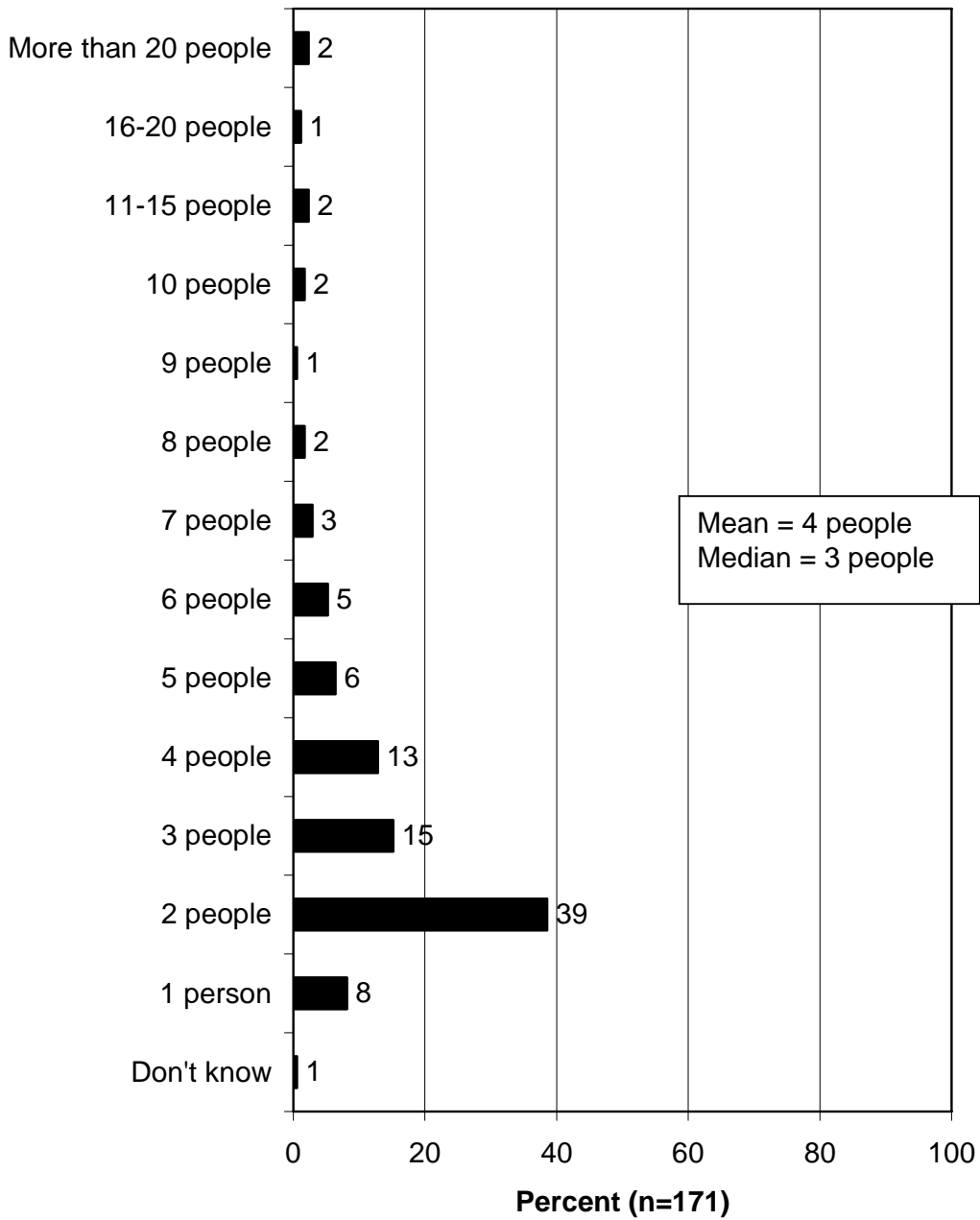
**Q101. By what means did you travel to the Panama City area?
(Visitor survey)**



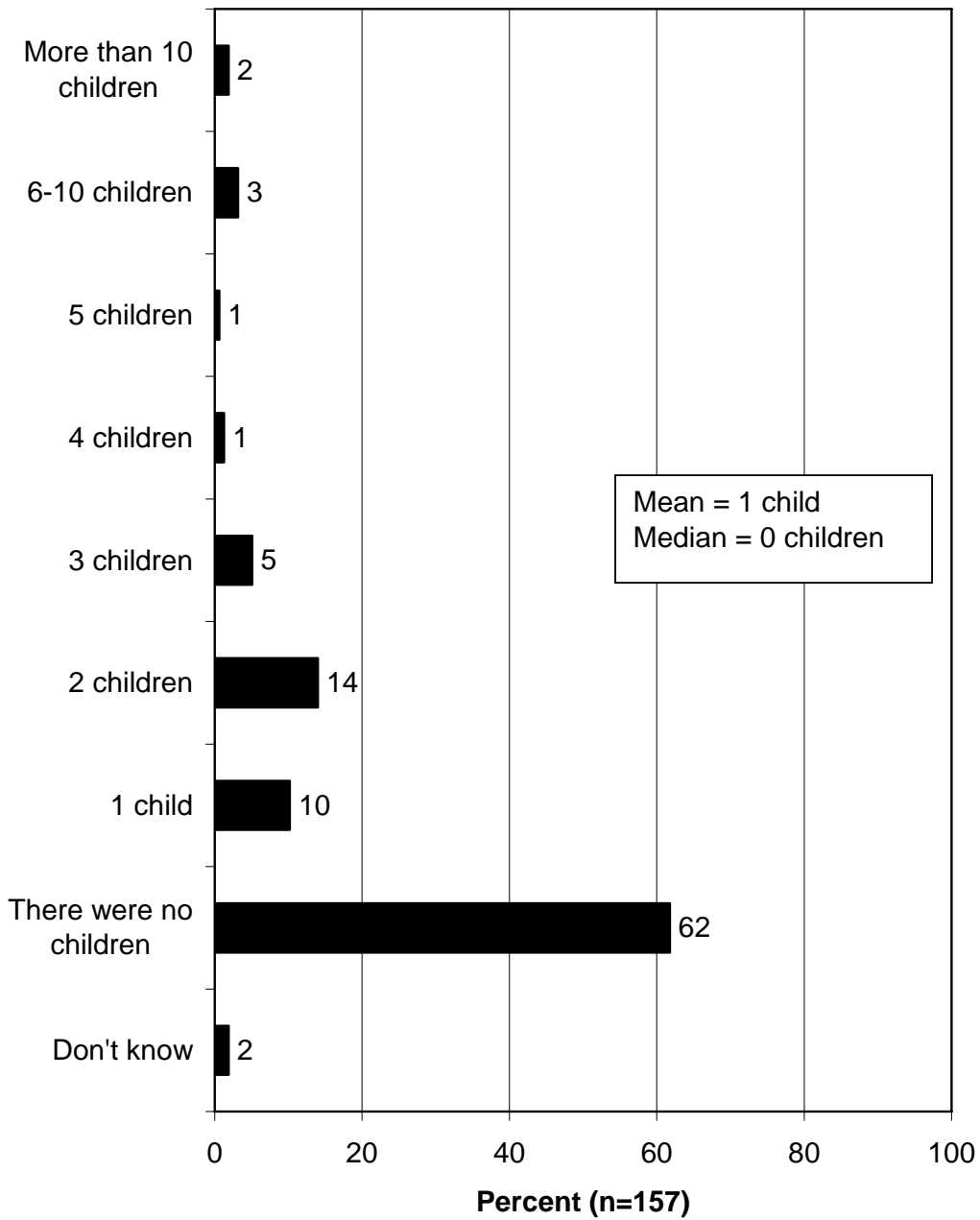
Q103. Where are you staying / Where did you stay while in the Panama City area? (Visitor survey)



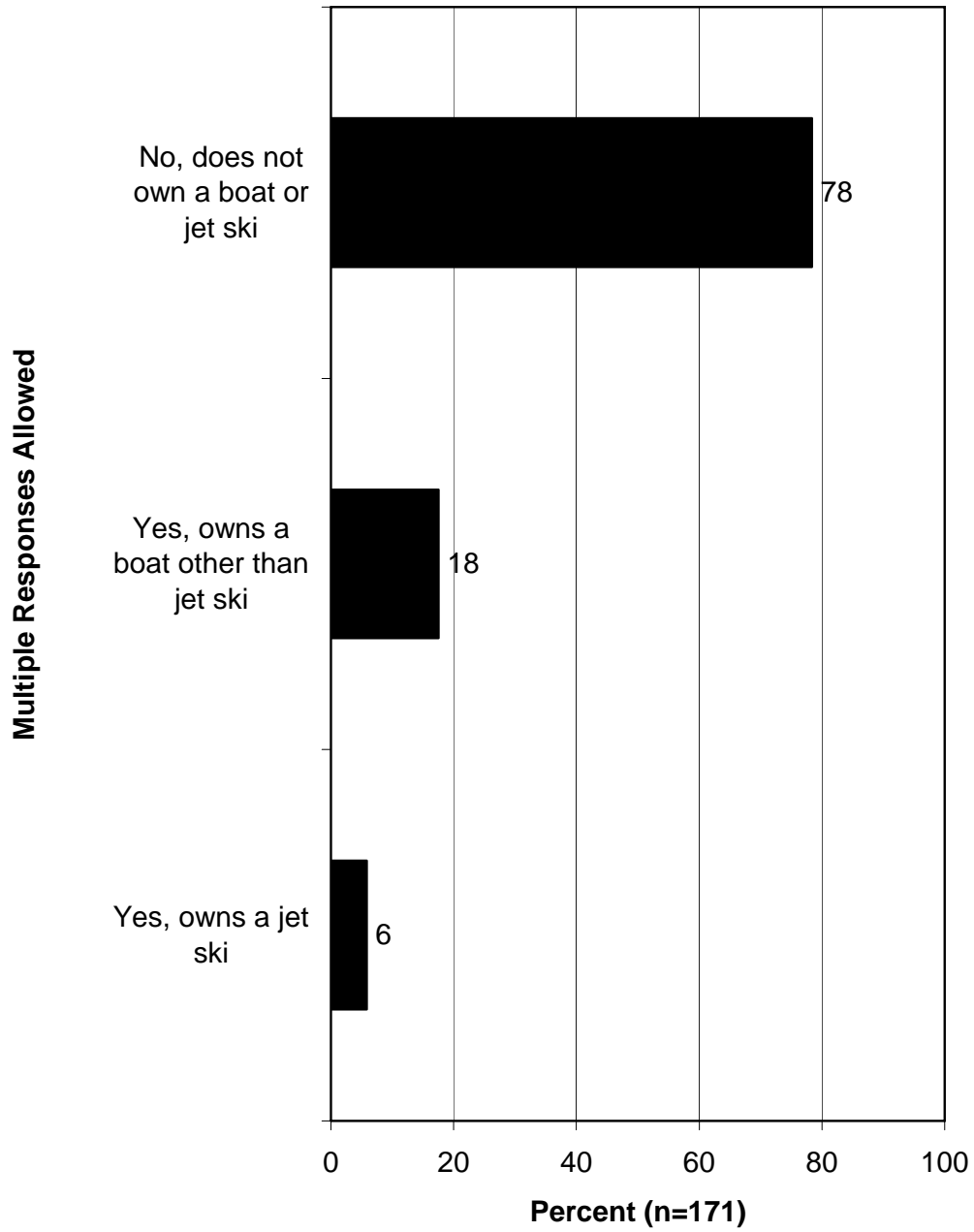
**Q105. How many people, including yourself, are / were in your traveling party?
(Visitor survey)**



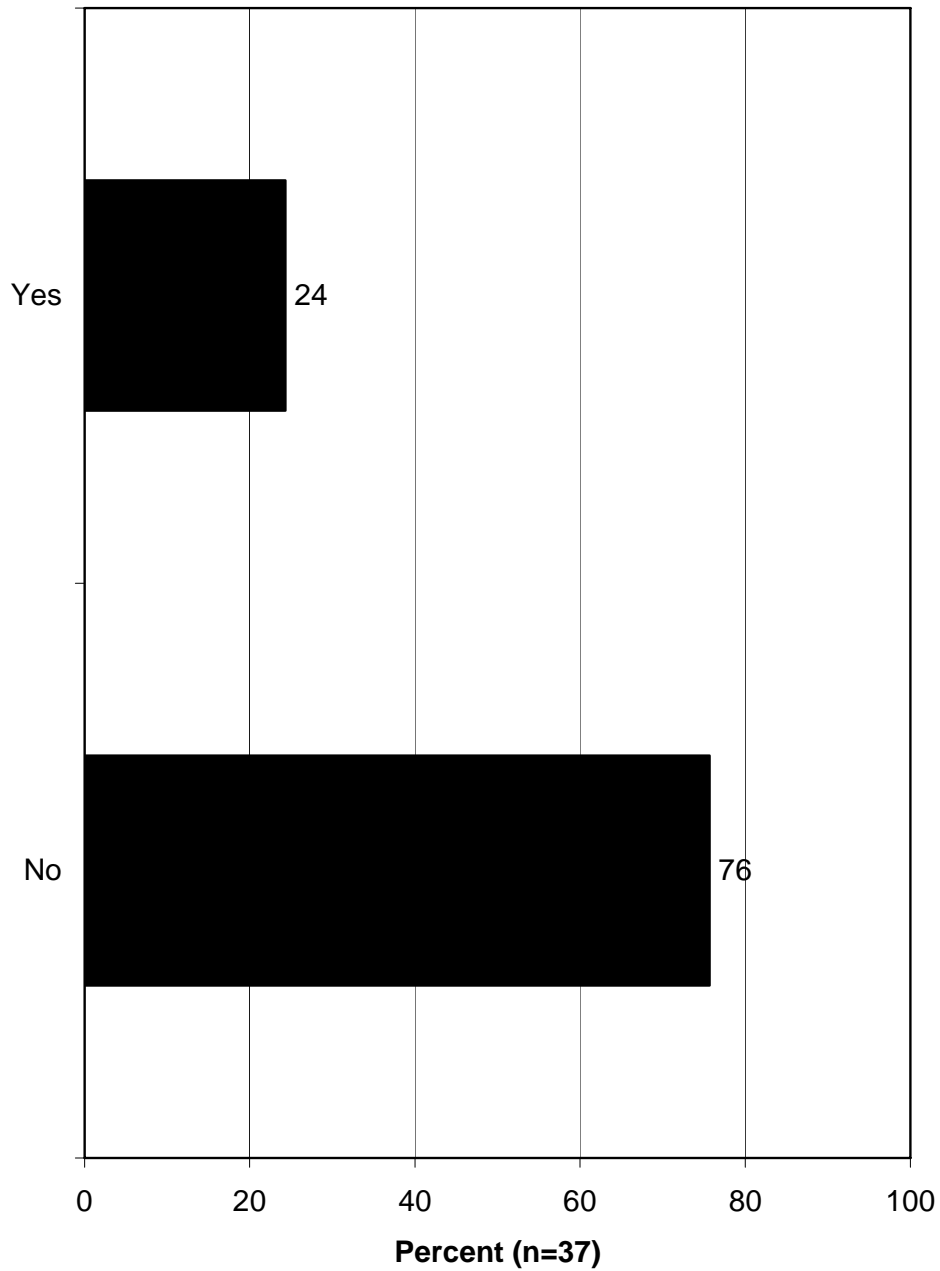
**Q108. How many of those people in your traveling party are / were children 17 years or younger?
(Asked of those who did not travel alone.)
(Visitor survey)**



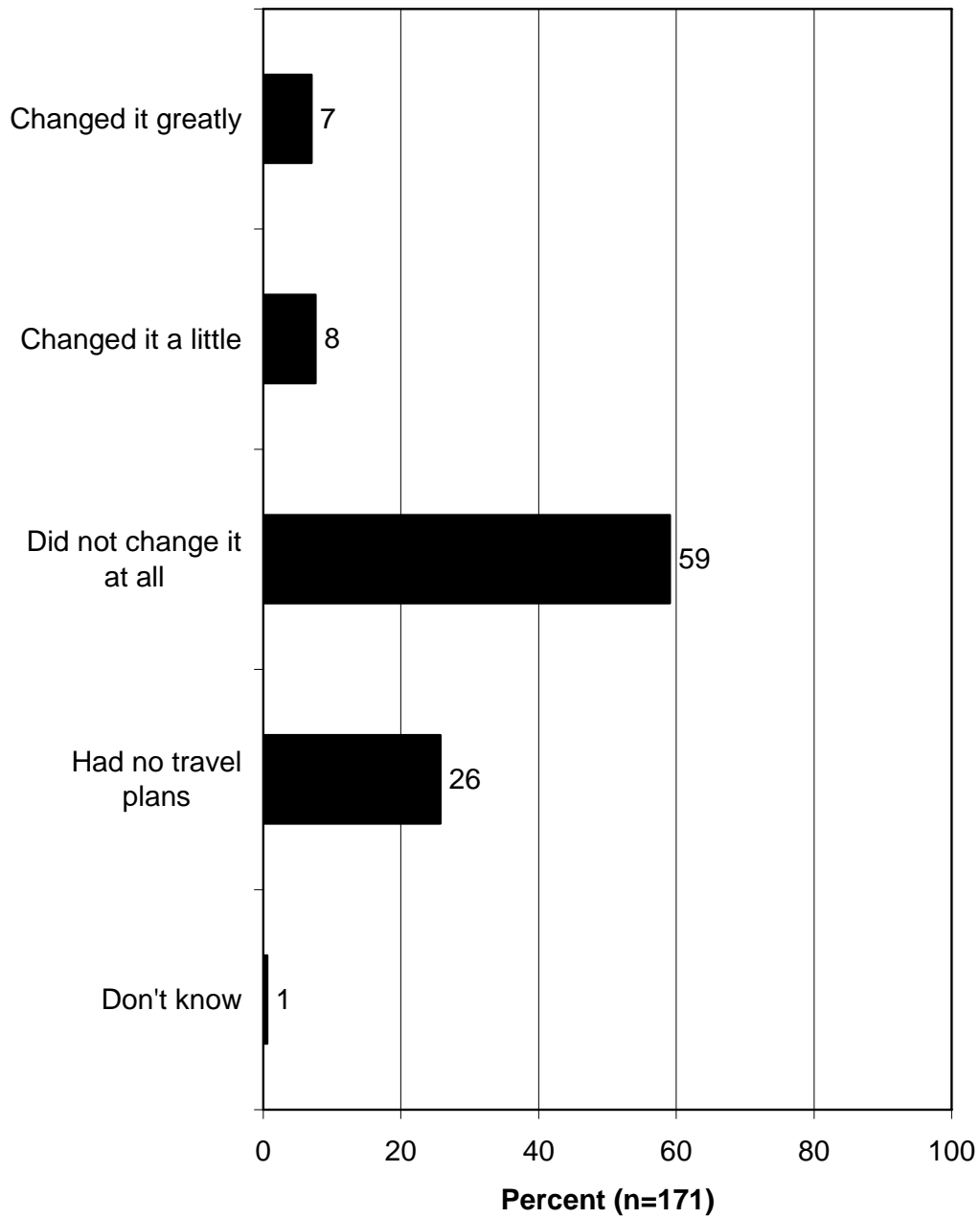
**Q150. Do you own a boat or a jet ski?
(Visitor survey)**



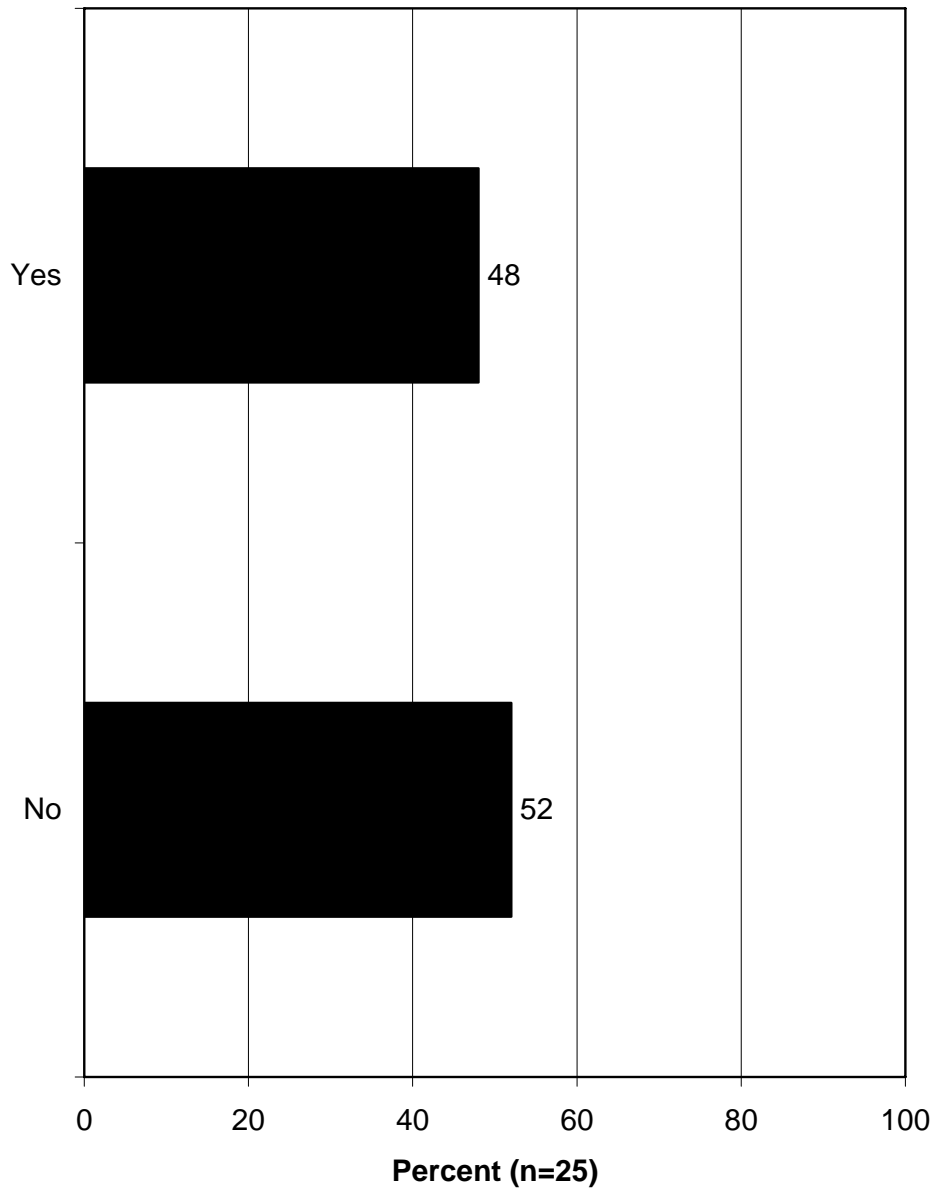
**Q151. In general, do you trailer or bring your boat or jet ski to the Panama City area when you visit?
(Asked of those who own a boat and/or jet ski.)
(Visitor survey)**



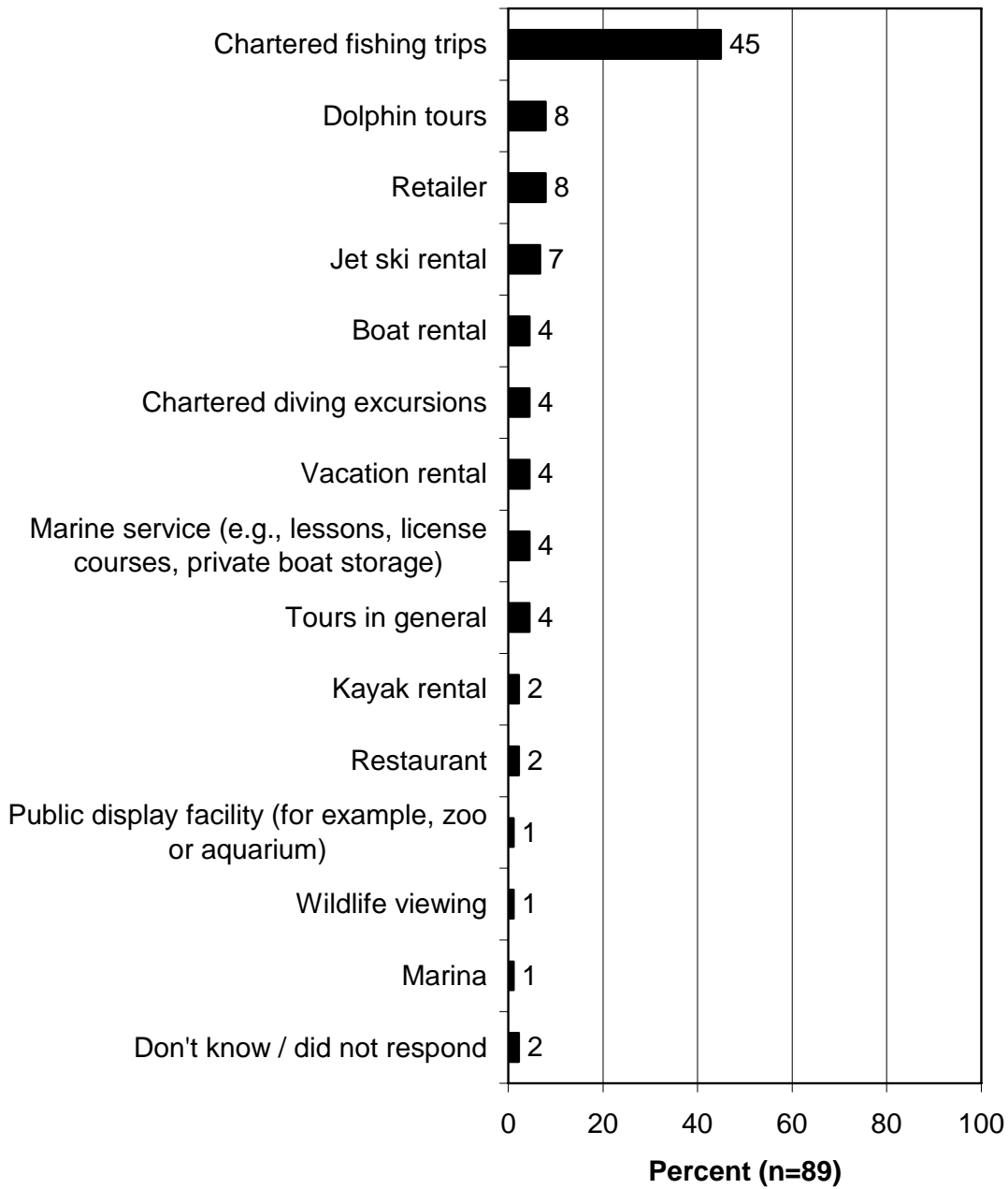
**Q152. Did the recent Gulf of Mexico oil spill change your travel plans this past summer, or did you have any travel plans?
(Visitor survey)**



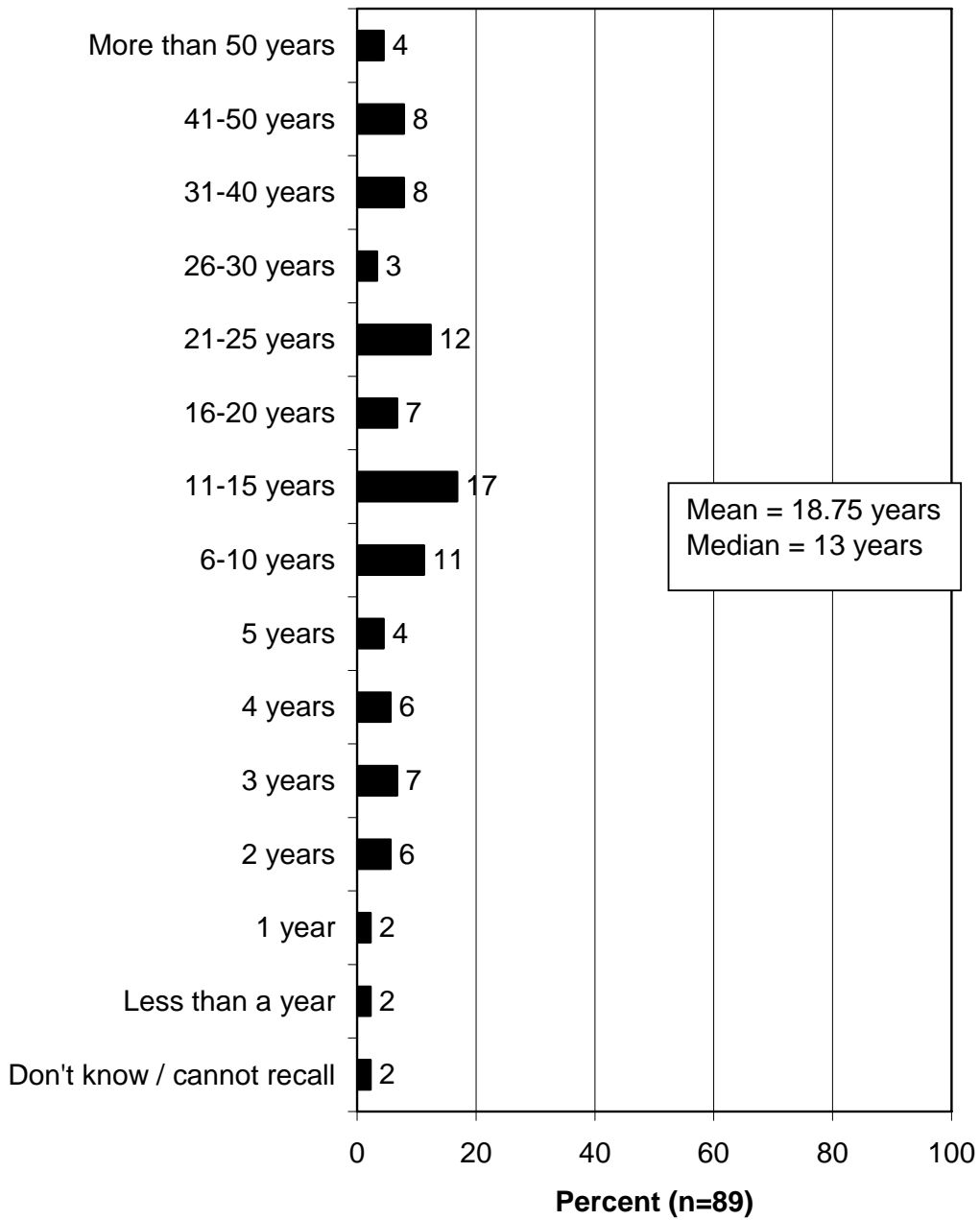
**Q153. Did you reschedule your current / your most recent trip to the Panama City area because of the oil spill? (Asked of those who changed their travel plans this past summer because of the recent Gulf of Mexico oil spill.)
(Visitor survey)**



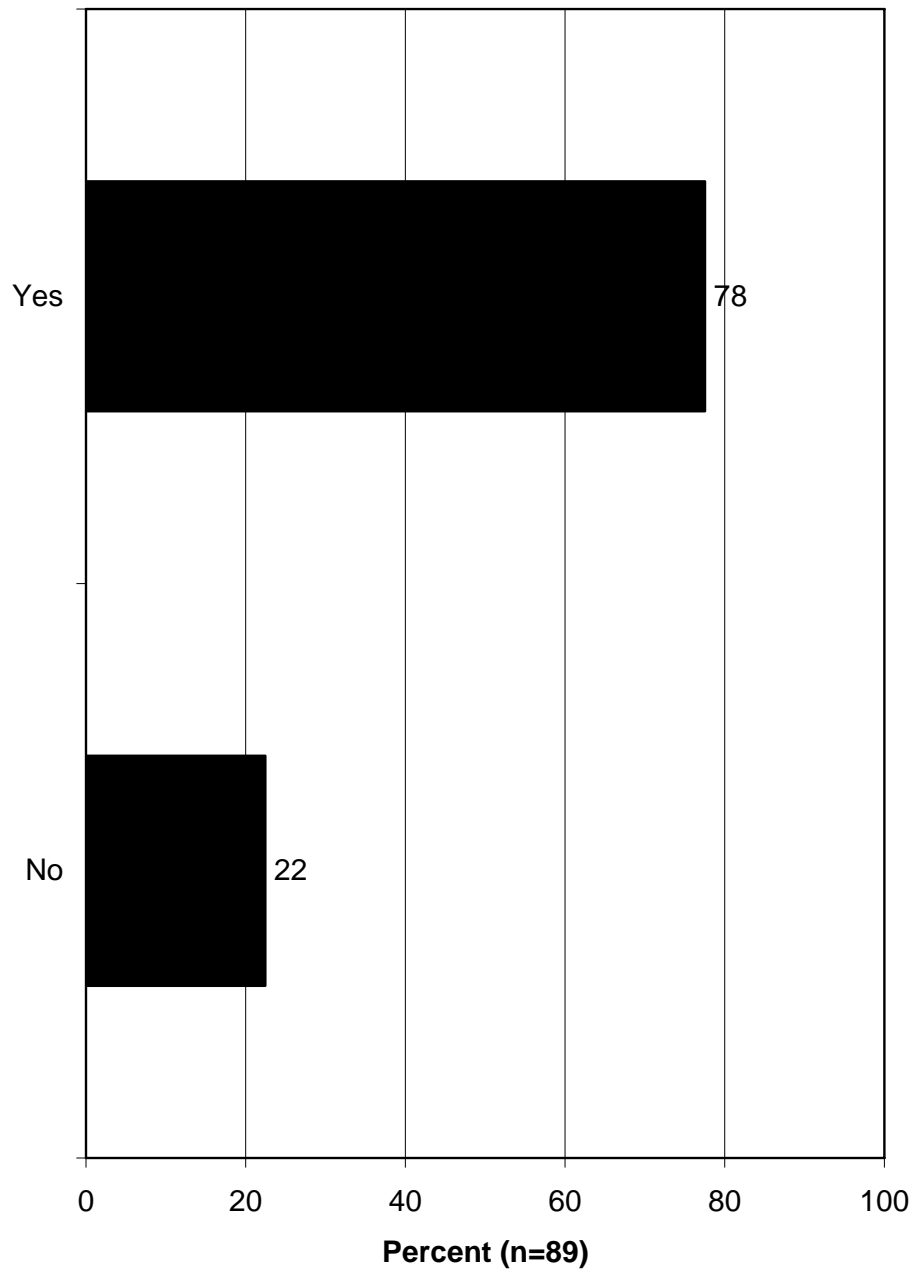
**Q26. Which of the following best describes your business?
(Business survey)**



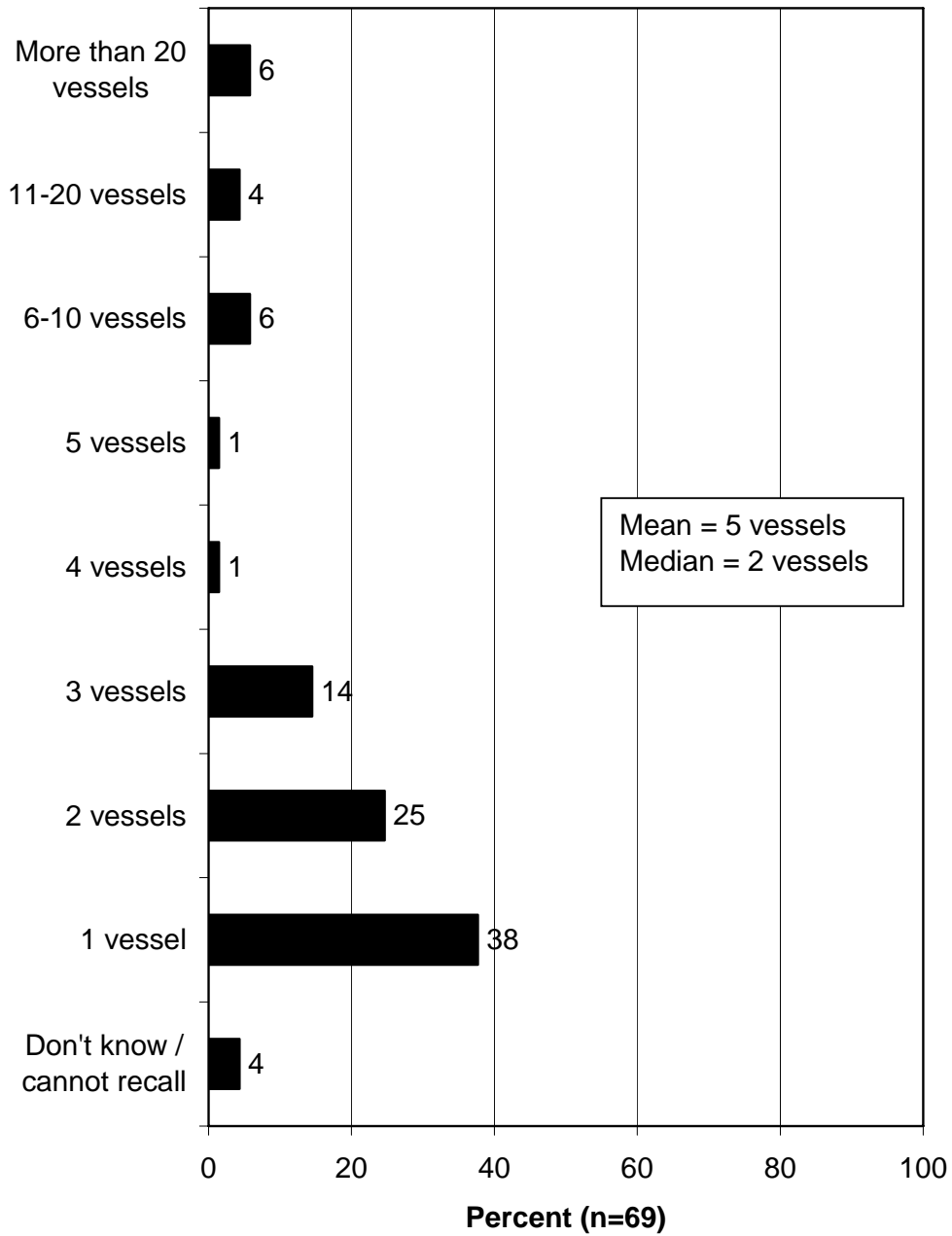
**Q20. How many years has your business been in operation?
(Business survey)**



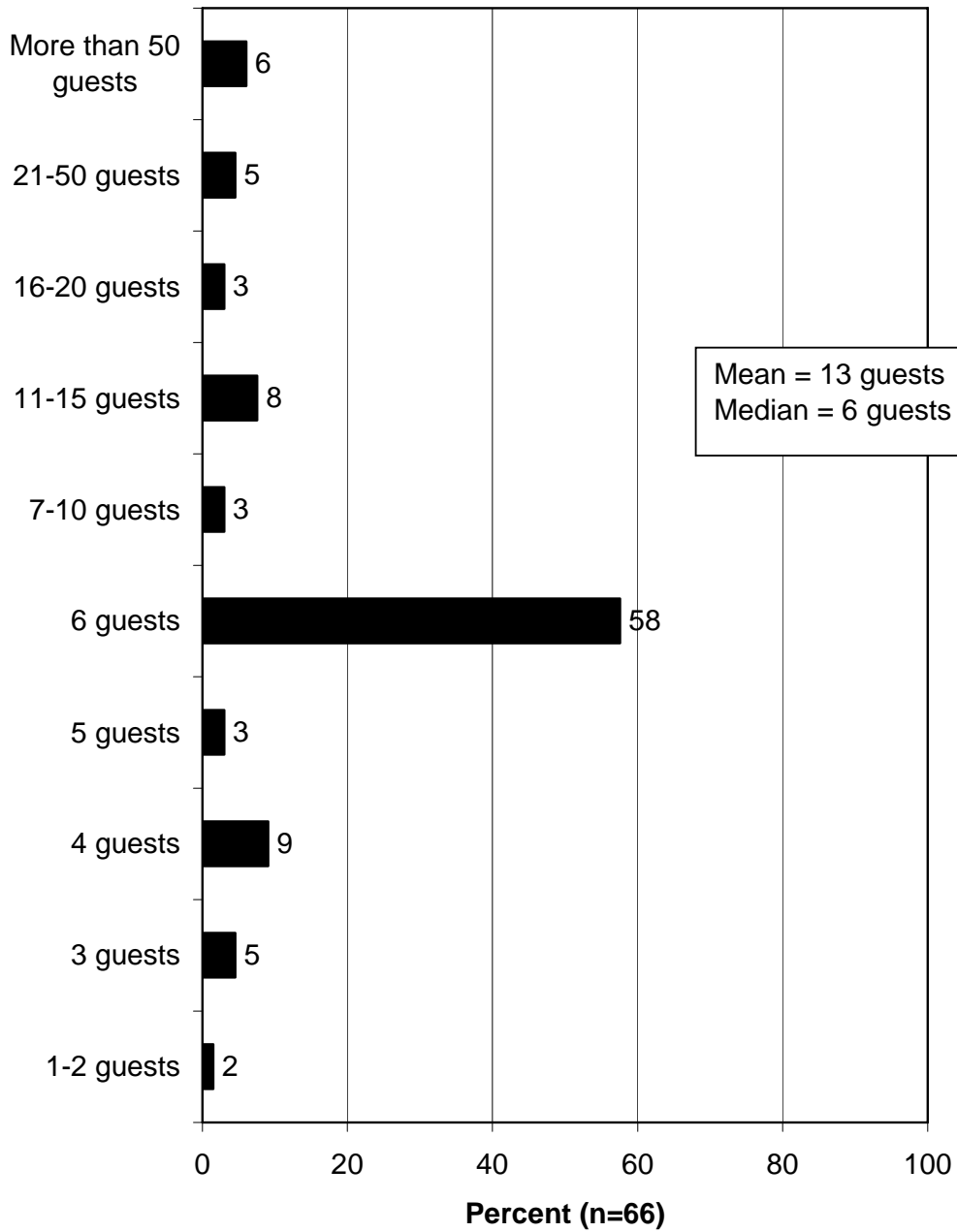
**Q21. Is your business vessel-based? (In other words, does your business entail using a boat?)
(Business survey)**



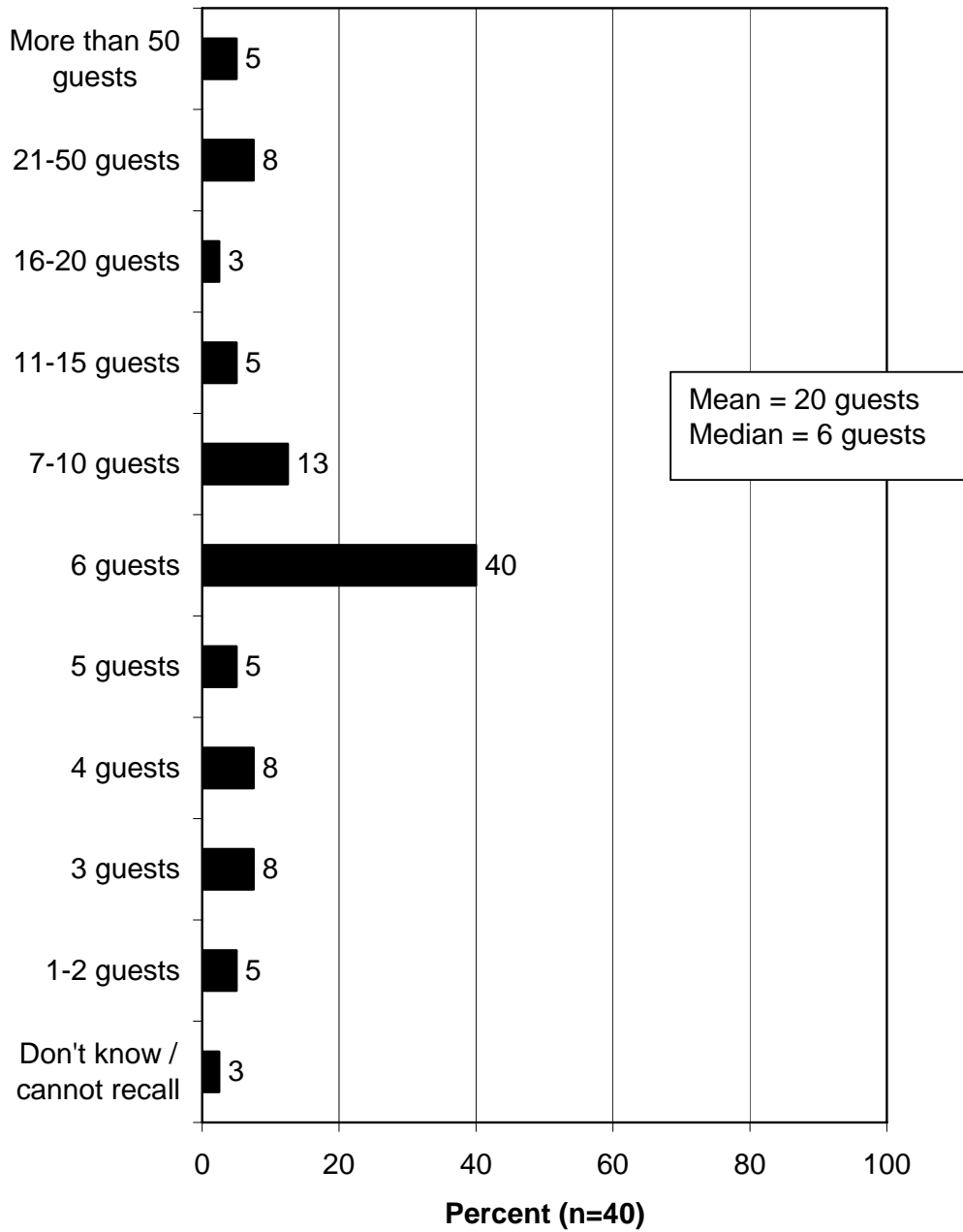
**Q22. How many vessels does your company own?
(Asked of those whose business is
vessel-based.)
(Business survey)**



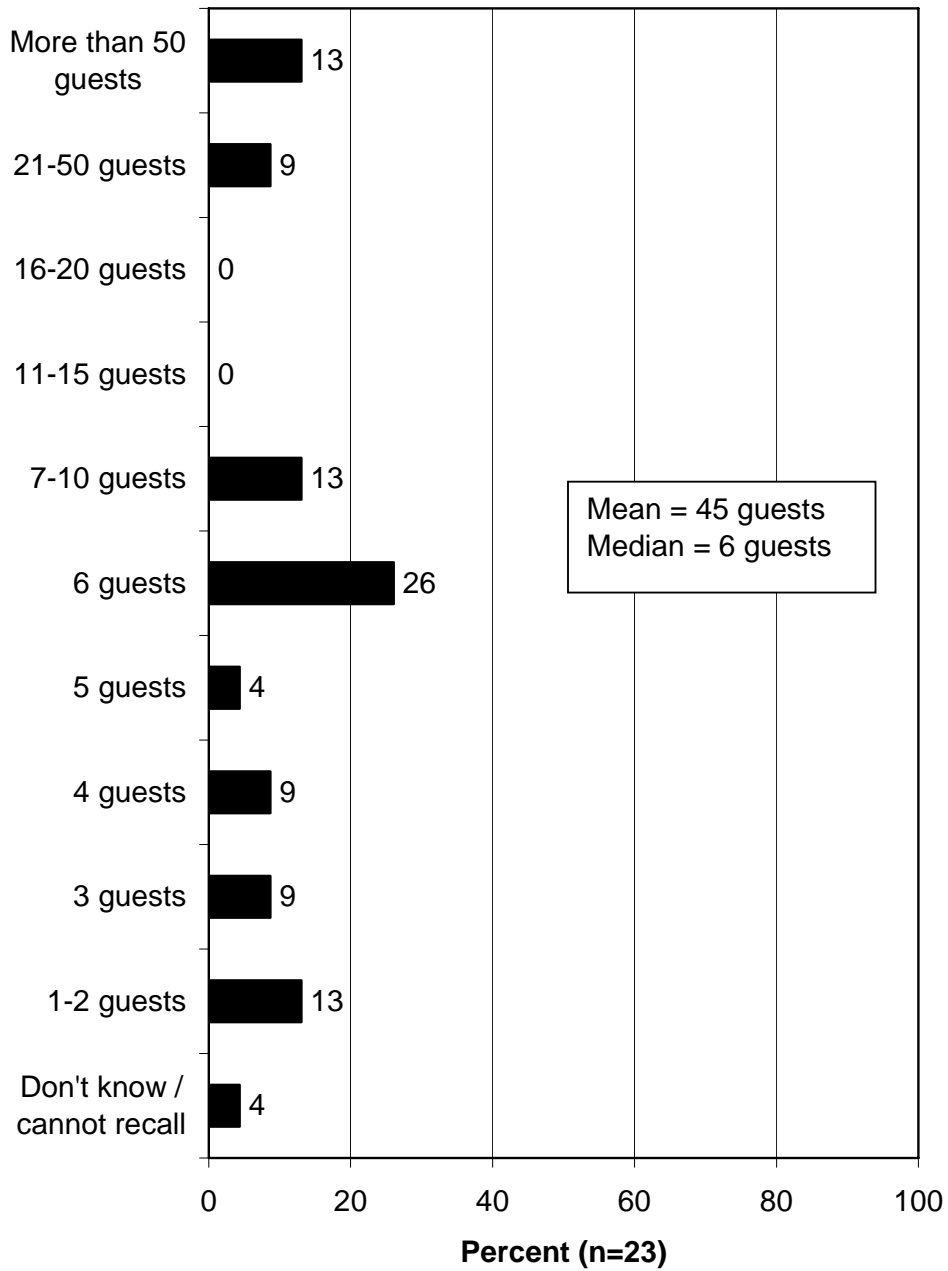
**Q23a. How many guests does your first vessel hold? (Asked of those whose business is vessel-based and own at least one vessel.)
(Business survey)**



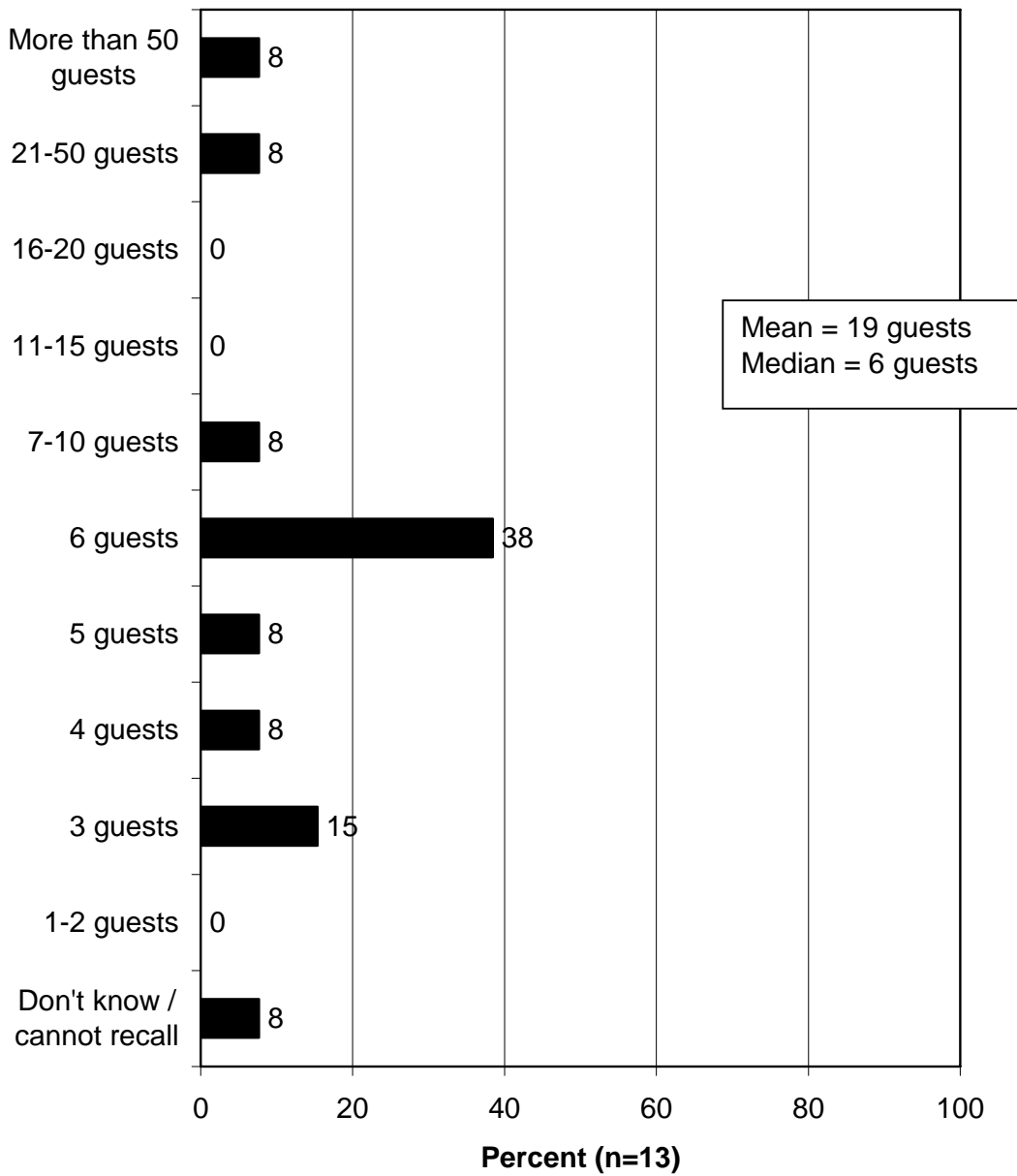
**Q23b. How many guests does your second vessel hold? (Asked of those whose business is vessel-based and own at least two vessels.)
(Business survey)**



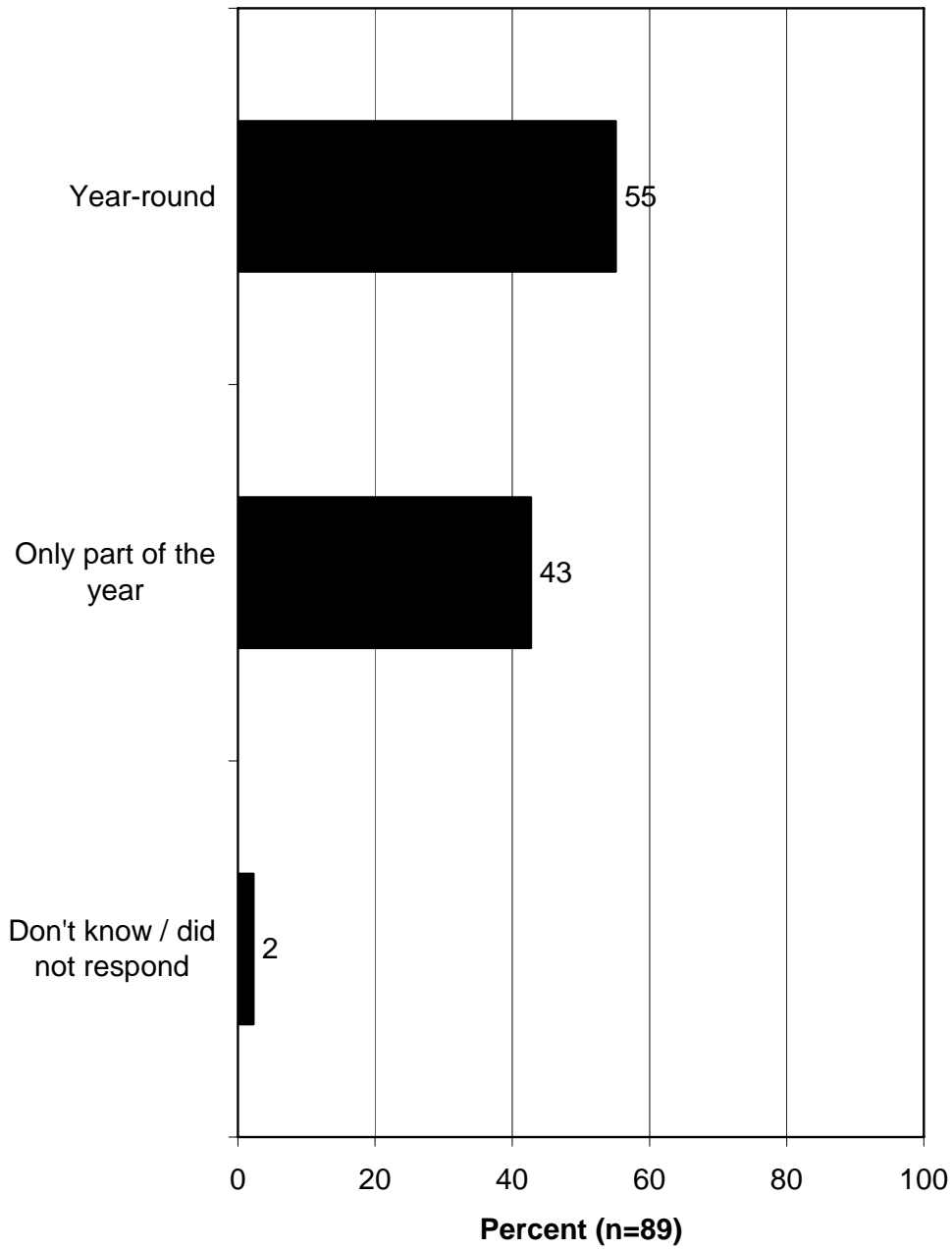
Q23c. How many guests does your third vessel hold? (Asked of those whose business is vessel-based and own at least three vessels.) (Business survey)



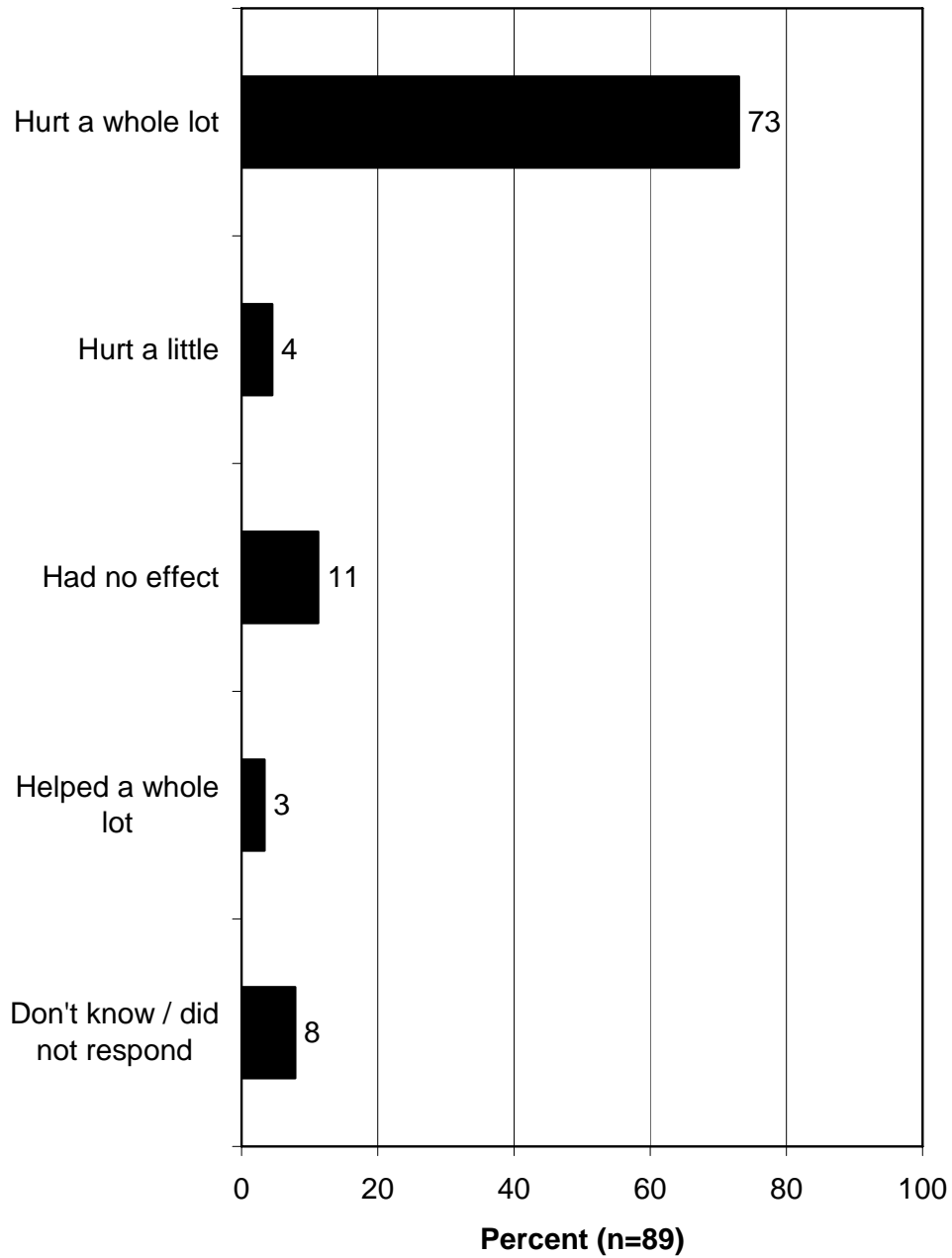
**Q24. If your business owns more than 3 vessels, how many guests does a typical vessel at your company hold? (Asked of those whose business is vessel-based and own more than 3 vessels.)
(Business survey)**



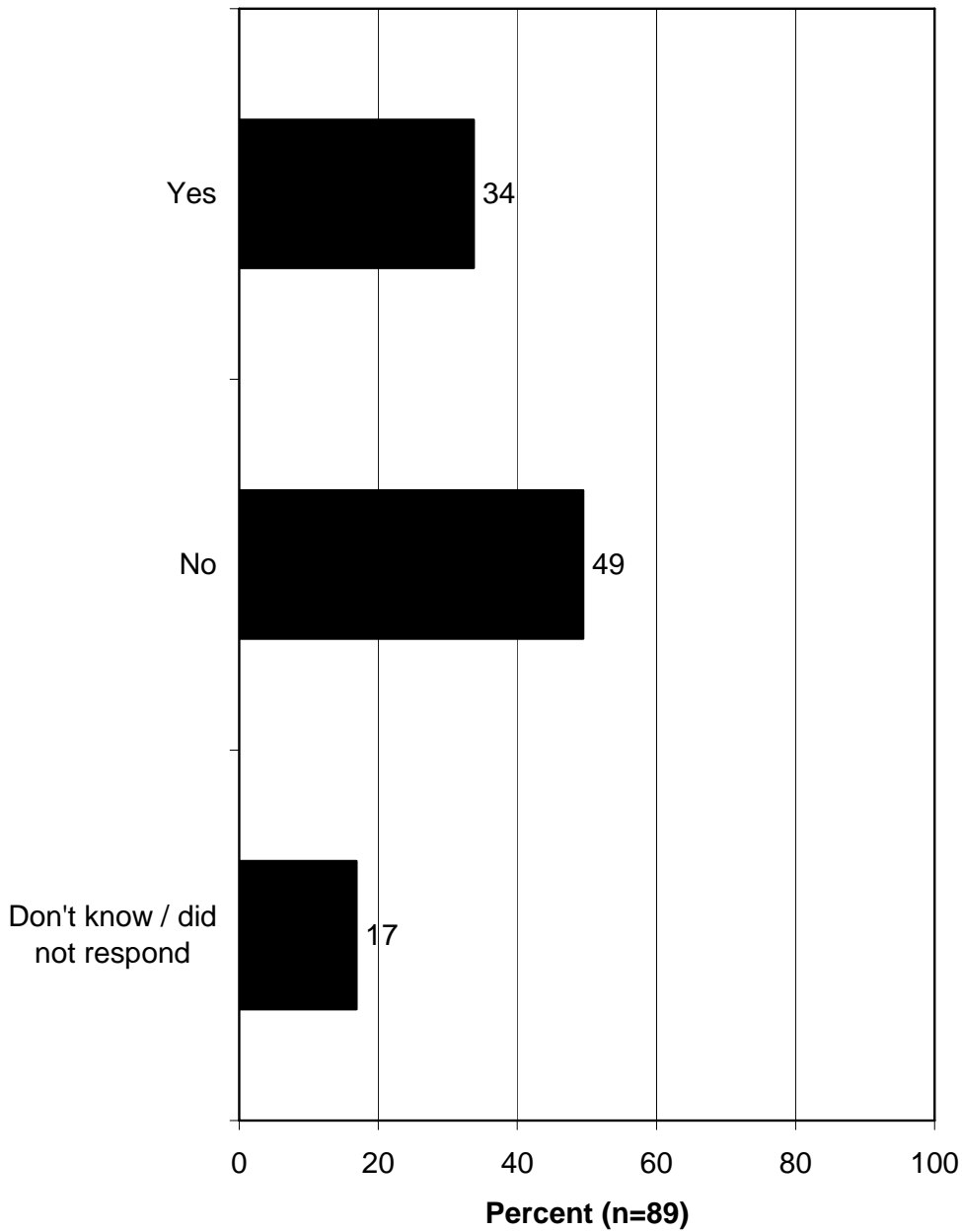
**Q25. Does your business operate year-round?
(Business survey)**



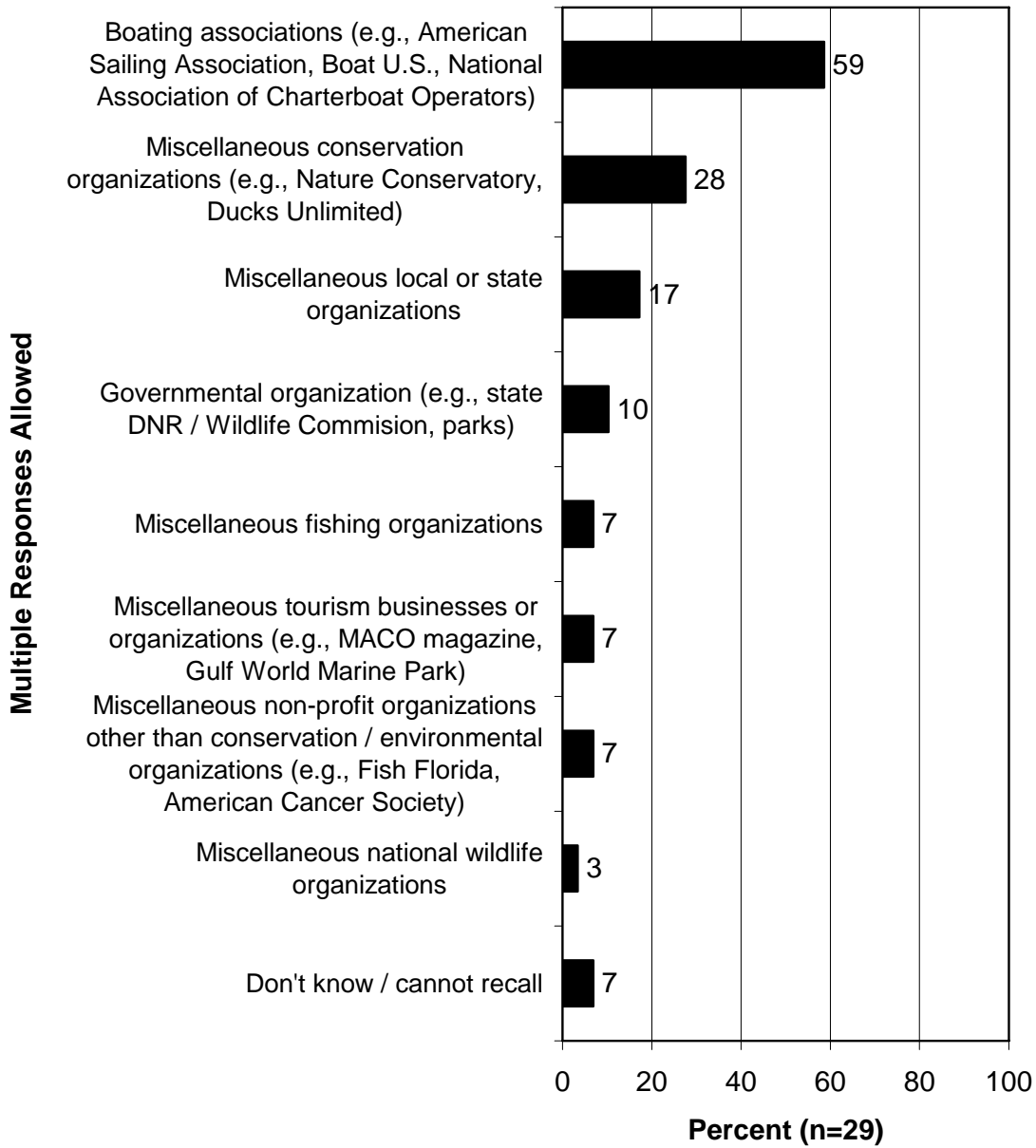
**Q37. Do you think the oil spill in the Gulf hurt or helped your business, or did it not have any effect?
(Business survey)**



**Q38. Are you or is your business a member of or have you or your business donated to any boating, fishing, recreation, or conservation organizations in the past 2 years?
(Business survey)**



**Q39. Which boating, fishing, recreation, or conservation organizations are you or your business a member of or have donated to? (Asked of those whose business or who personally are a member of or have donated to any boating, fishing, recreation, or conservation organization.)
(Business survey)**



ABOUT RESPONSIVE MANAGEMENT

Responsive Management is an internationally recognized public opinion and attitude survey research firm specializing in natural resource and outdoor recreation issues. Our mission is to help natural resource and outdoor recreation agencies and organizations better understand and work with their constituents, customers, and the public.

Utilizing our in-house, full-service telephone, mail, and web-based survey center with 50 professional interviewers, we have conducted more than 1,000 telephone surveys, mail surveys, personal interviews, and focus groups, as well as numerous marketing and communication plans, needs assessments, and program evaluations.

Clients include the federal natural resource and land management agencies, most state fish and wildlife agencies, state departments of natural resources, environmental protection agencies, state park agencies, tourism boards, most of the major conservation and sportsmen's organizations, and numerous private businesses. Responsive Management also collects attitude and opinion data for many of the nation's top universities.

Specializing in research on public attitudes toward natural resource and outdoor recreation issues, Responsive Management has completed a wide range of projects during the past 20 years, including dozens of studies of hunters, anglers, wildlife viewers, boaters, park visitors, historic site visitors, hikers, birdwatchers, campers, and rock climbers. Responsive Management has conducted studies on endangered species; waterfowl and wetlands; and the reintroduction of large predators such as wolves, grizzly bears, and the Florida panther.

Responsive Management has assisted with research on numerous natural resource ballot initiatives and referenda and has helped agencies and organizations find alternative funding and increase their membership and donations. Additionally, Responsive Management has conducted major organizational and programmatic needs assessments to assist natural resource agencies and organizations in developing more effective programs based on a solid foundation of fact.

Responsive Management has conducted research on public attitudes toward natural resources and outdoor recreation in almost every state in the United States, as well as in Canada, Australia, the United Kingdom, France, Germany, and Japan. Responsive Management has also conducted focus groups and personal interviews with residents of the African countries of Algeria, Cameroon, Mauritius, Namibia, South Africa, Tanzania, Zambia, and Zimbabwe.

Responsive Management routinely conducts surveys in Spanish and has conducted surveys in Chinese, Korean, Japanese and Vietnamese and has completed numerous studies with specific target audiences, including Hispanics, African-Americans, Asians, women, children, senior citizens, urban, suburban and rural residents, large landowners, and farmers.

Responsive Management's research has been upheld in U.S. District Courts; used in peer-reviewed journals; and presented at major natural resource, fish and wildlife, and outdoor recreation conferences across the world. Company research has been featured in most of the nation's major media, including CNN, *The New York Times*, *The Wall Street Journal*, and on the front pages of *USA Today* and *The Washington Post*. Responsive Management's research has also been highlighted in *Newsweek* magazine.

Visit the Responsive Management website at:

www.responsivemanagement.com