

**LOUISIANA OFFICE OF TOURISM
EFFECT OF FILM ON VISITATION**

**RESEARCH REPORT
4.18.18**



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Background and Research Objectives

Background

Many iconic movies and TV shows (productions) are filmed and set in Louisiana each year, from *Steel Magnolias* to *American Horror Story*. The Louisiana Office of Tourism tasked MDRG with conducting market research to understand the impact these productions have on tourism. MDRG conducted the research reported herein to meet this request.

Research Objectives

The primary research objective is to estimate the volume of travel that is influenced by productions filmed and set in Louisiana.

Specific Objectives Include

- + Estimate the total Louisiana tourism spending attributable to productions filmed and set in Louisiana
- + Measure the effect of familiarity with productions filmed and set in Louisiana on likelihood to visit the state
- + Measure the impact of productions filmed and set in Louisiana on respondents' impressions of the state

Methodology and Sample

Methodology

From March 9-22, 2018, MDRG used an online panel to collect a total of 602 surveys. The median survey time was 6 minutes.

Screening Criteria

All respondents were screened to ensure they

- + Have taken at least one domestic leisure trip in the past twelve months
- + Are age 25+
- + Are a decision maker or share decision-making for household travel planning
- + Do not work in advertising, market research, film, or travel/tourism

Target

- + U.S. domestic travelers

Quotas

MDRG managed sample to ensure recent visitors and non-visitors were demographically and geographically similar.

MDRG monitored sample to ensure that at least 50% of them visited some part of the state other than New Orleans.

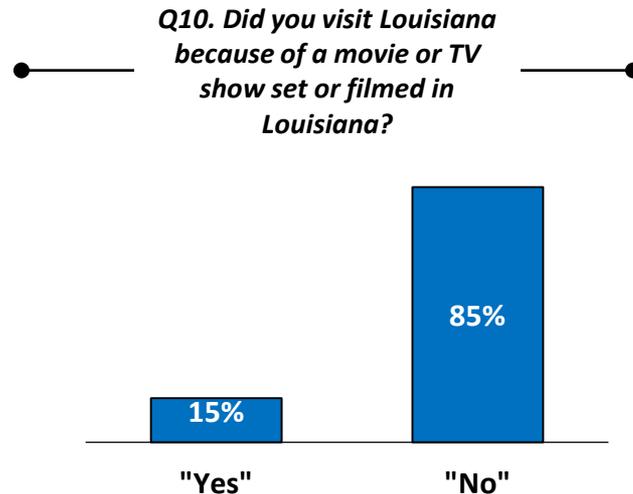
Sample Pool



IMPACT OF FILM AND TV PRODUCTION ON TOURISM

Challenges in Measuring

One way to understand how many people visit Louisiana because of a movie or TV show is to directly ask. The challenge is in interpreting the response – did the respondent visit Louisiana because of the production or did they watch the production because they visited Louisiana?



When we asked Recent Visitors to Louisiana, “Did you visit Louisiana because of a movie or TV show set or filmed in the state?,” nearly 15% said “Yes.”

We know from experience that the answer to questions such as the one above relies on respondents’ subjective memories. Even if respondents are trying to be honest, some may lack the introspective ability to answer the question correctly. For example, just as respondents in marketing studies cannot accurately report whether an ad drove them to purchase a product, we believe that the respondents in our study cannot accurately tell us if viewing a production inspired them to visit Louisiana.

Instead, we look closely at the behavior of those who have seen productions filmed and set in Louisiana versus those who have not to understand what impact this has on visitation to the state.

Measuring Unconscious Decisions

Since we believe respondents cannot accurately recall whether a movie or TV show filmed and set in Louisiana influenced their decision to visit the state, we look at a more answerable question to guide us – what productions have you seen?

1. Respondents were shown a list of 39 movies and TV shows and selected the ones they had seen.
2. Recent visitors to Louisiana were asked whether they viewed the production before or after their trip to the state.
3. Only productions viewed before a trip to Louisiana were counted as being possibly influential on visitation.

We found that most respondents, regardless of whether they are Recent Visitors or Non-Visitors, have seen at least a handful of productions filmed and set in Louisiana (table at right).

On the next page, we explain how production viewership can be used to measure the influence of these productions on behavior.

PRODUCTION VIEWERSHIP

# Productions Seen	Recent Visitors (n=300)	Non-Visitors (n=302)
1 or more	97.3%	96.0%
2 or more	94.0%	94.0%
3 or more	92.0%	90.4%
4 or more	86.7%	86.4%
5 or more	83.3%	81.1%
6 or more	78.7%	74.8%
7 or more	73.7%	68.2%
8 or more	68.3%	58.9%

Estimating Influence

To attribute travel to Louisiana to viewership of movies and TV shows filmed and set in the state, MDRG created a definition of “viewership.” Throughout the report, MDRG distinguishes between High Viewership and Low Viewership.

High Viewership refers to those respondents who reported viewing eight or more productions from our list, while Low Viewership refers to those who have seen fewer than eight productions.

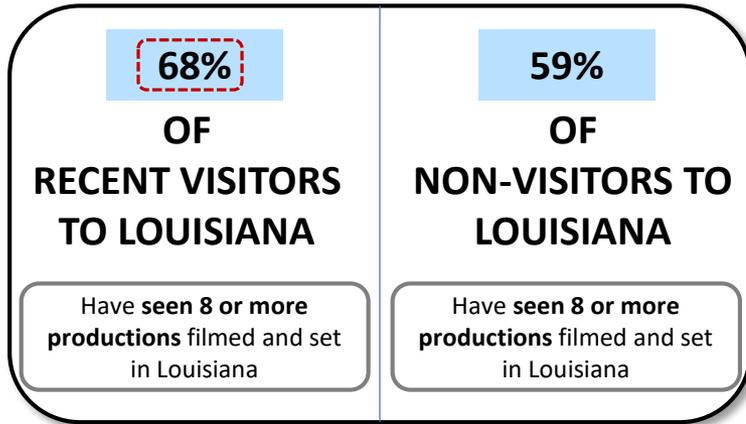
The two groups, Recent Visitors and Non-Visitors, were recruited to have the same demographic and geographic characteristics, so differences in attitudes and behaviors between the groups are likely related to production viewership. The most important difference we see is that more Visitors (68%) than Non-Visitors (59%) are High Viewers, a difference of 9.4 percentage points.

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7 or more	73.7%	68.2%
8 or more	68.3%	58.9%

Economic Impact

Tourism Dollars Attributable to Productions Filmed and Set in Louisiana



Looking at High Viewers only, we find that more Recent Visitors than Non-Visitors fall into that category, with a difference of nine percentage points.

Therefore, MDRG estimates that nine percent of visitors were influenced by viewing productions filmed and set in Louisiana.

The 2016 DK Shifflet Report Estimates that domestic visitors to Louisiana spent \$15.1 Billion while visiting the state. Using this number, we estimate the tourism impact attributable to production viewership as follows:

\$15.1 Billion

tourism spending
per year



9%

visits influenced by viewing
Louisiana productions



Estimated \$1.3 Billion

Annual tourism revenue that may be attributable to
Louisiana productions

= Statistically greater than Non-Visitors at 95% confidence level

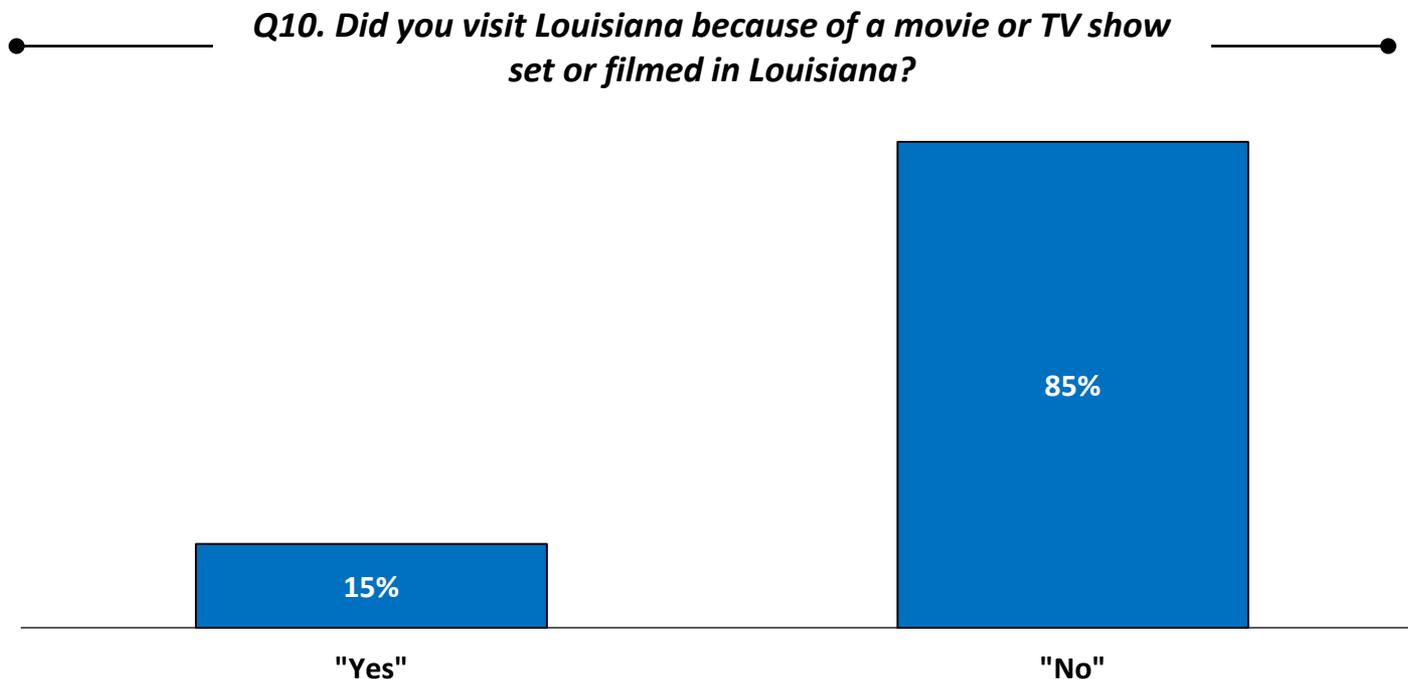
DETAILED FINDINGS

Visiting Louisiana Due to Production Viewership



Recent Visitors to Louisiana (n=300)

When we asked respondents who have visited Louisiana in the past two years (Recent Visitors), “Did you visit Louisiana because of a movie or TV show set or filmed in Louisiana?” nearly 15% said “Yes.” However, in the same way that most respondents aren’t consciously aware of the effects of advertising on their behavior, most cannot directly tie viewing productions filmed in the state to their desire to visit. To better understand the effect of viewing Louisiana productions on visitation to the state, MDRG looks more closely at production-watching behavior.

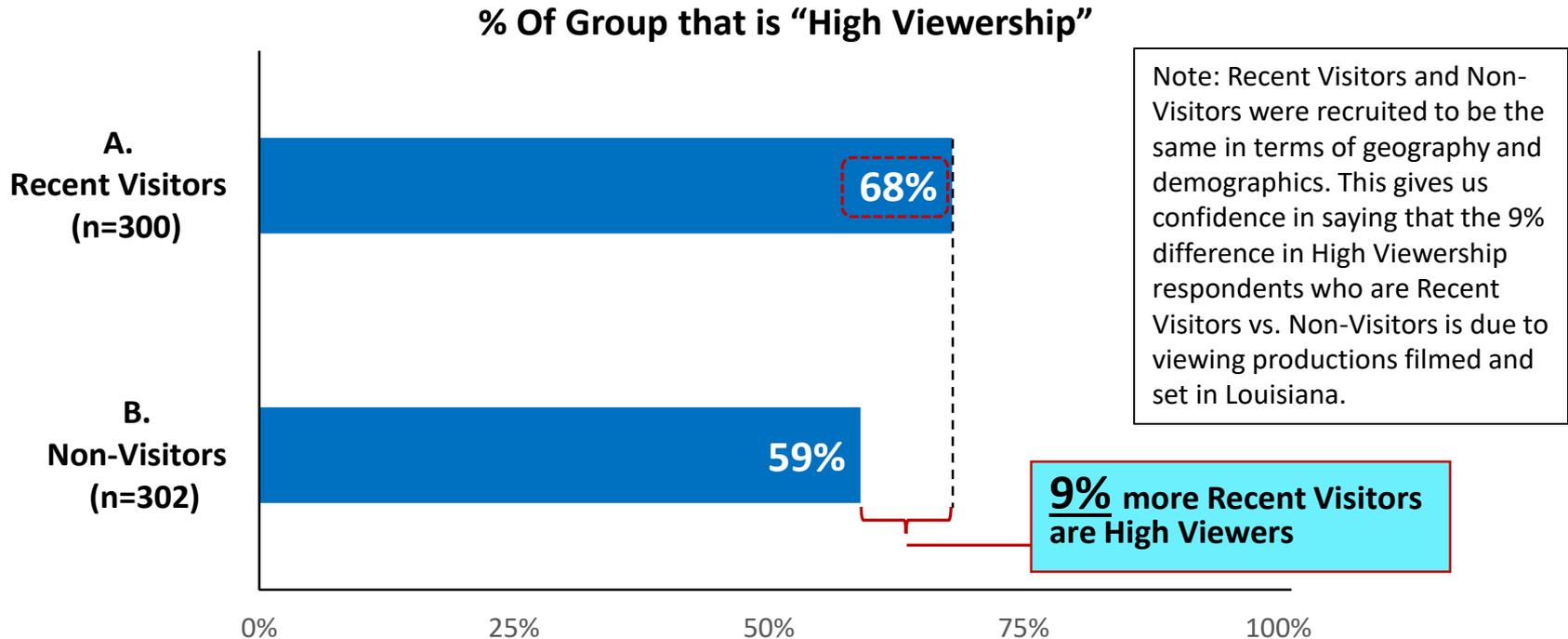


Production Viewership



Total Respondents

Recent Visitors to Louisiana are significantly more likely (9%) than Non-Visitors to have seen eight or more productions filmed and set in Louisiana (High Viewership). This relationship between High Viewership and visitation suggests that viewing Louisiana productions influences likelihood to visit the state.



*The number of productions seen controls for those who visited and viewed productions AFTER visiting.

= Statistically greater than the counterpart group at 95% confidence level

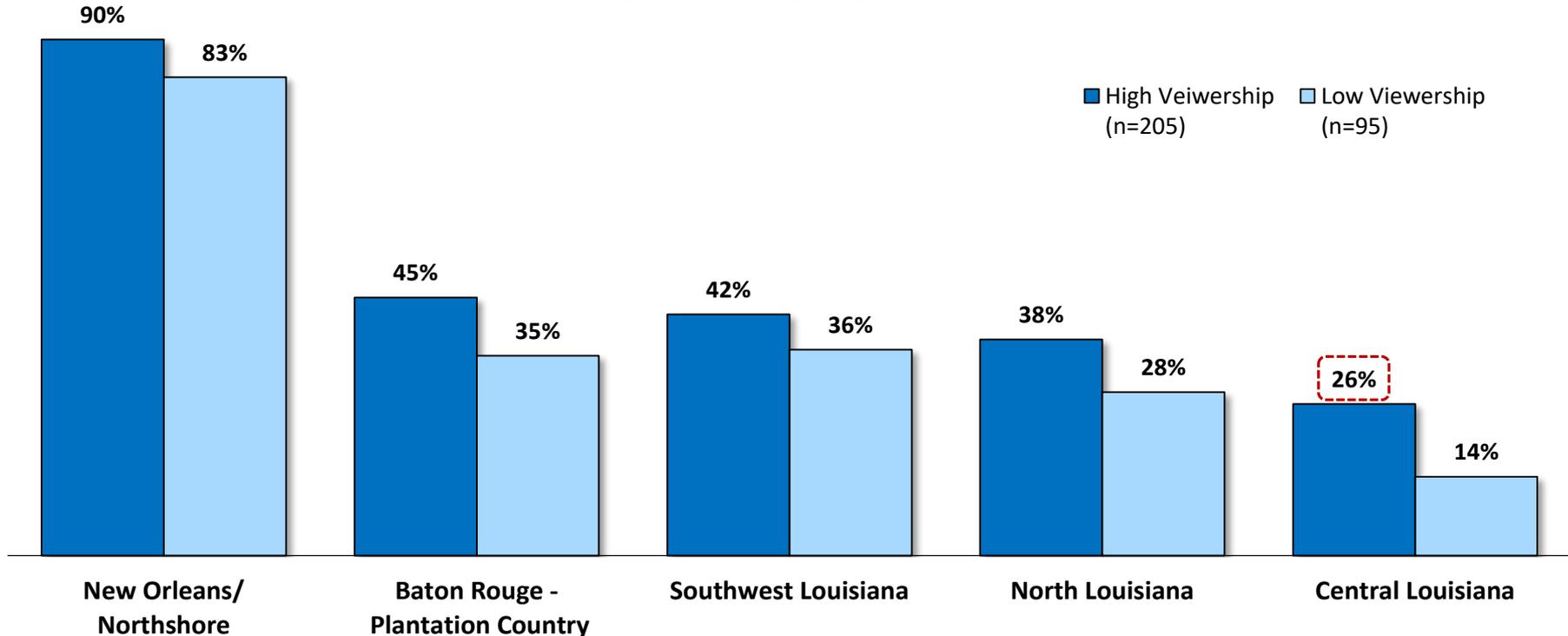
Areas of Louisiana Visited



Recent Visitors to Louisiana (n=300)

All visitors to Louisiana are highly likely to have visited the New Orleans/Northshore Area, but those with High Viewership of productions filmed and set in Louisiana are more likely to have visited other parts of the state, particularly Central Louisiana. This suggests that High Viewership respondents typically visit more areas within the state than those with Low Viewership.

% Who Visited the Area



Multiple Responses Allowed

Q1. Which of the following areas did you visit on your last trip to the state?

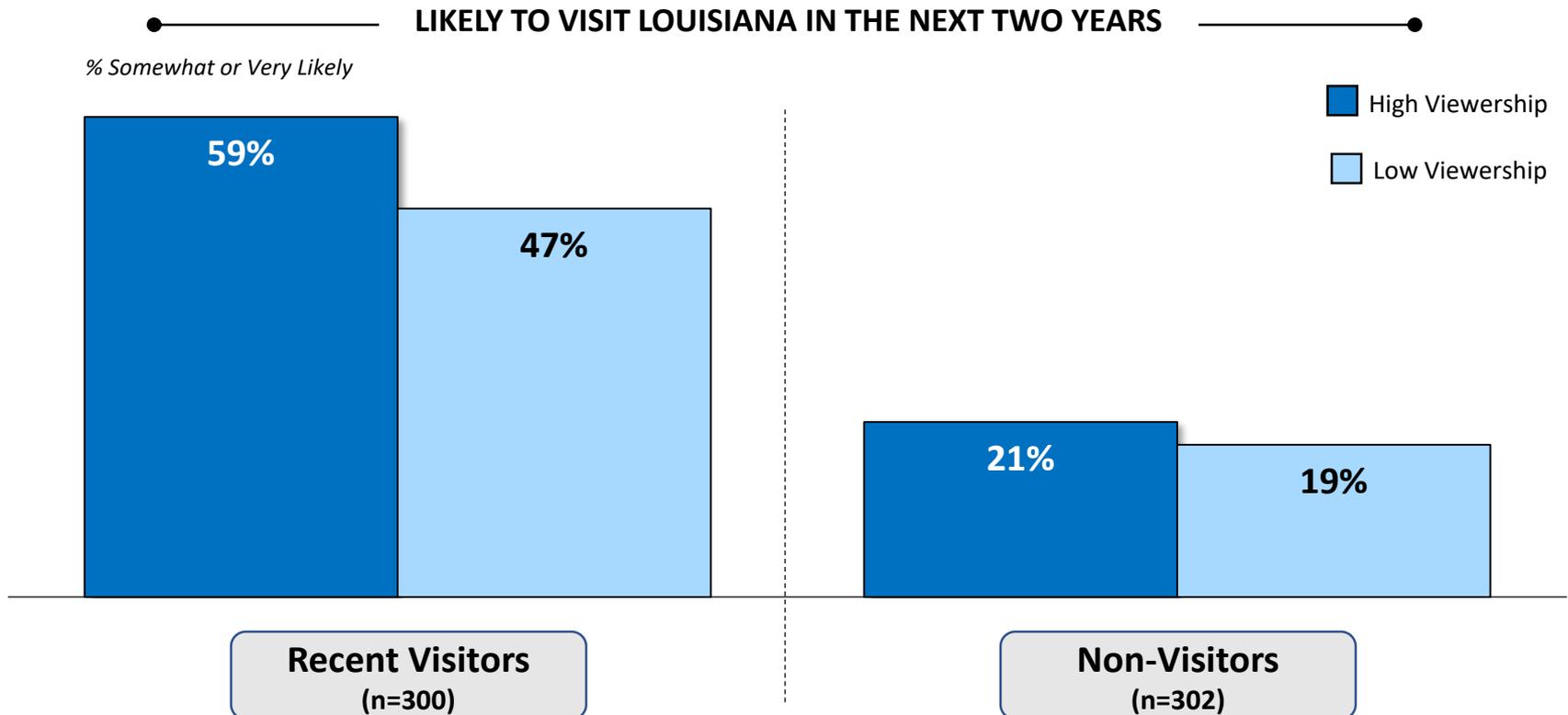
 = Statistically greater than the counterpart group at 95% confidence level

Likelihood to Visit Louisiana



Total Respondents

From prior research, we know that Recent Visitors to Louisiana are more likely to return in the near future. This is reflected in the high percentage of Recent Visitors who say they are likely to visit again. However, respondents with High Viewership are slightly more likely than those with Low Viewership to say they will return. Among Non-Visitors, there are no significant differences in visit likelihood from High Viewership to Low Viewership.

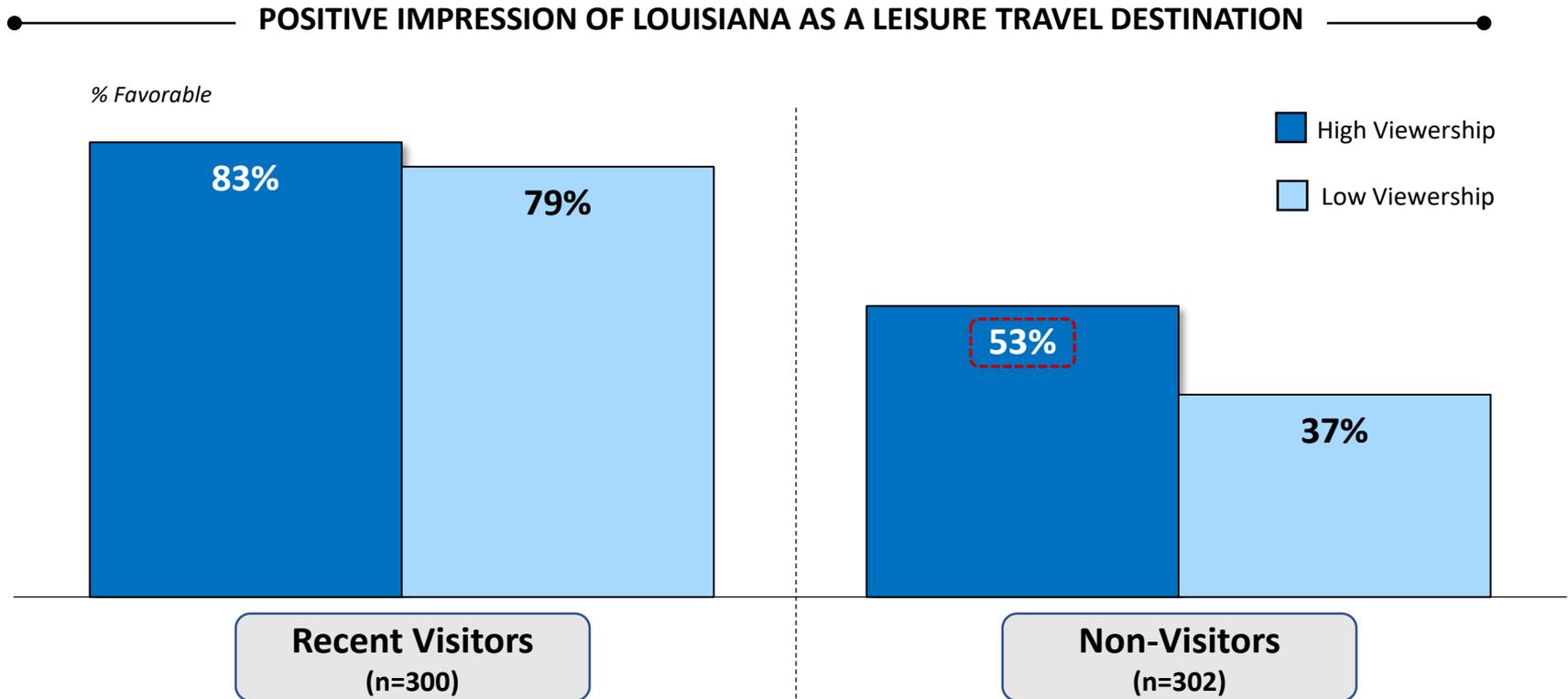


Overall Impressions of Louisiana



Total Respondents

Recent Visitors have high overall impressions of the state, regardless of Viewership status, which suggests that these impressions are influenced more heavily by the visit itself than by viewing Louisiana productions. However, among Non-Visitors, those with High Viewership are significantly more likely to say they have a positive view of the state. This suggests that Louisiana productions may be contributing to this positive impression.



Q3. Which of the following best describes your overall impression of Louisiana as a leisure travel destination?

53% = Statistically greater than the counterpart group at 95% confidence level

Louisiana Attribute Ratings



Total Respondents

● RECENT VISITORS ● NON-VISITORS ●

<u>Units:</u> Mean (Agreement on a 1-5 Scale)	A. High Viewership (n=205)	B. Low Viewership (n=95)	A. High Viewership (n=178)	B. Low Viewership (n=124)
Q4. Louisiana has/is...				
Restaurants that offer superb, local cuisine	4.46	4.43	4.29	3.84
Easy to access via interstate or air travel	4.41	4.34	4.19	3.81
A variety of historical and cultural attractions	4.33	4.32	4.18	3.76
Exciting nightlife venues	4.24	4.22	4.04	3.59
Attractions the whole family can enjoy	4.24	4.22	4.04	3.59
A variety of outdoor activities	4.28	4.21	3.93	3.65
Great live music & entertainment	4.16	4.11	3.88	3.44
A good value, that is priced right for me	4.15	3.74	3.84	3.53
A safe and secure place	4.00	3.97	3.64	3.28
Unique shopping opportunities	3.91	3.79	3.56	3.22
Interesting fairs and festivals	3.84	3.62	3.56	3.30
Unique experiences	3.84	3.66	3.45	3.11
A beautiful and scenic place	3.61	3.33	3.19	2.97

For both Recent Visitors and Non-Visitors, those with High Viewership of Louisiana productions gave the state higher ratings on every attribute.

This effect is mild among Recent Visitors, likely because their impressions of the state are based upon the visit itself. However, among Non-Visitors, the effect of High Viewership on attribute ratings is significant, suggesting that watching productions filmed and shot in Louisiana may encourage positive impressions of the state.

= Highest Rating

= Statistically greater than the counterpart group at 95% confidence level

Commonly Mentioned Productions (Unaided)



Total Respondents

When asked to list movies and TV shows that come to mind when they think of Louisiana, most respondents struggled. However, Non-Visitors are significantly more likely than Recent Visitors to report “I don’t know” or “none.”

Recent Visitors are significantly more likely to mention NCIS: New Orleans. In general, many respondents mentioned TV shows, which suggests that their recurring nature keeps them top of mind for viewers.

Most Common Unaided Mentions

Units: %	Total Respondents (n=602)	A. Recent Visitors (n=300)	B. Non-Visitors (n=302)
I DON'T KNOW/ NONE	34	29	38
NCIS: New Orleans	20	23	16
Swamp People	6	4	8
The Big Easy	5	6	5
Duck Dynasty	3	4	2
Treme	2	2	2
True Blood	2	2	2
Double Jeopardy	2	2	1
True Detective	2	1	2
Interview With the Vampire	1	1	2
Steel Magnolias	1	2	1

 = TV Show

Q5. When you think of Louisiana, what movies or TV shows, if any, come to mind?

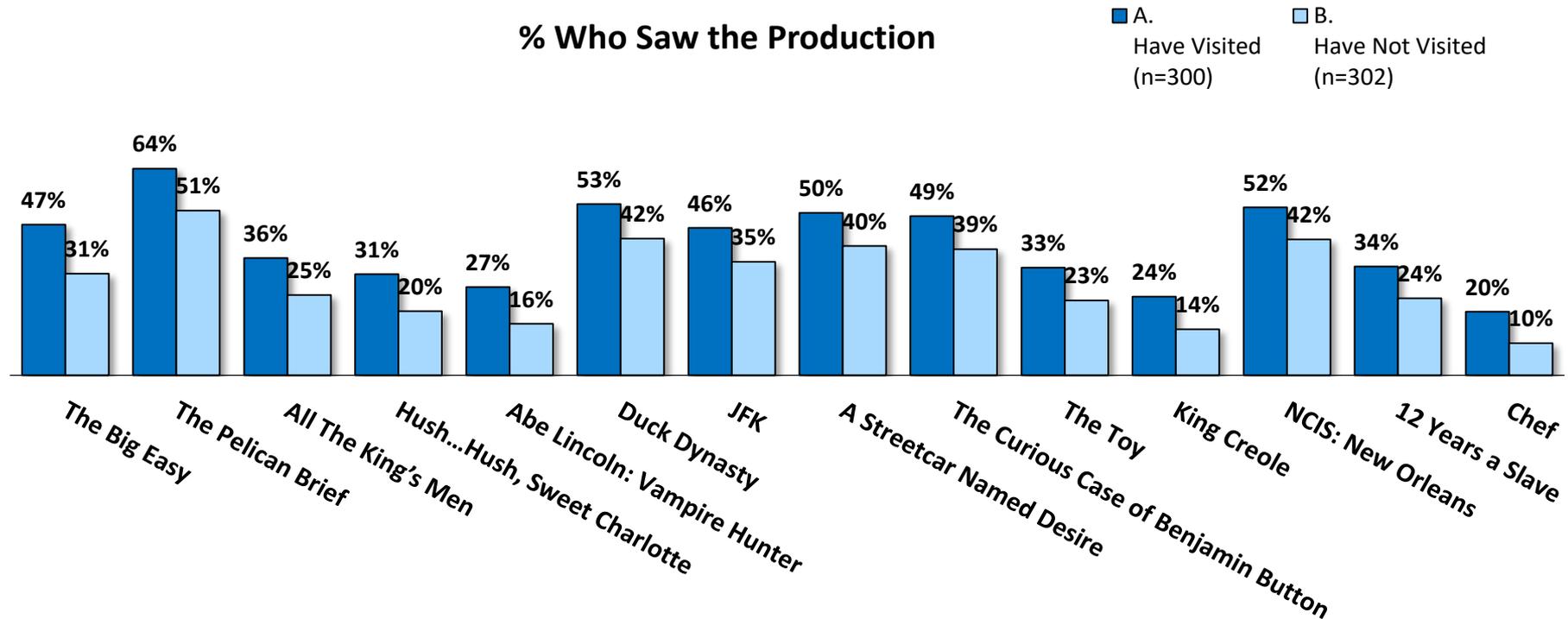
 = Statistically greater than the counterpart group at 95% confidence level

Familiarity with Productions (Aided)



Total Respondents

Some productions may inspire more visitation than others. The productions listed are those that displayed a 10% or greater difference in viewership between Recent Visitors and Non-Visitors. The relationship between viewership and visitation suggests there may be a quality in these productions that captures viewers' imaginations. Many of the productions on this list are political or historical dramas in which Louisiana serves as an important character and setting for the action.



RESPONDENT PROFILE

Respondent Profile

Units: % Unless otherwise noted	Total Respondents (n=602)	Have Visited (n=300)	Have Not Visited (n=302)
GENDER			
Male	47	48	47
Female	53	52	53
AGE			
Millennial	21	20	21
Generation X	35	35	34
Baby Boomer	45	44	45
Avg. Age	50.14	49.84	50.44
RACE/ETHNICITY			
African American/Black	5	7	3
Asian	4	4	4
Caucasian/White	83	81	86
Hispanic	5	5	6
Native American or Pacific Islander	<1	<1	--
Other	1	1	<1
Prefer not to answer	1	1	1
EDUCATION			
Less than high school	1	1	1
High school graduate	9	9	10
Trade or vocational school	3	3	3
Some college	18	17	18
College graduate	40	40	40
Post graduate work or degree	29	30	27
Prefer not to answer	<1	1	--

Respondent Profile

Units: % Unless otherwise noted	Total Respondents (n=602)	Have Visited (n=300)	Have Not Visited (n=302)
MARITAL STATUS			
Single, never married	16	16	15
Living with partner	7	7	8
Married	65	66	65
Divorced or separated	9	8	10
Widowed	2	2	2
Prefer not to answer	1	1	1
CHILDREN			
0	70	69	72
1	13	15	12
2	11	10	11
3	3	4	3
4	1	1	2
5	<1	1	<1
6 or more	<1	<1	--
Prefer not to answer	<1	1	--
HOUSEHOLD INCOME			
Less than \$30,000	5	4	6
\$30,000 – \$39,999	7	4	10
\$40,000 – \$49,999	7	8	7
\$50,000 – \$59,999	10	9	11
\$60,000 – \$69,999	6	6	5
\$70,000 – \$79,999	9	11	8
\$80,000 – \$99,999	13	13	12
\$100,000 or more	37	40	34
Prefer not to answer	5	5	5

APPENDIX

Travel Due to Viewing Productions

Respondents who indicated they visited a destination due to viewing a production

43% of all respondents indicated they have chosen a leisure travel destination because they wanted to visit a place they saw in a movie or TV show.

We asked that 43% where they visited and which productions inspired the visit. As with unaided mentions of productions that come to mind when thinking of Louisiana, many respondents mentioned TV shows.

Most Common Unaided Mentions

Production Name	Destination	Respondents indicating they visited a destination due to viewing a production (n=258)
General Food or Travel Show	Any	5
Disney (any)	Disney World, FL	4
Midnight in the Garden of Good and Evil	Savanah, GA	2
Hawaii Five-0	Hawaii, HI	2
NCIS: New Orleans	New Orleans, LA	2
Miami Vice	Miami, FL	2
Full House	San Francisco, CA	2

= TV Show

Q8. Have you ever chosen a leisure travel destination because you wanted to visit a place you saw in a movie or TV show?

Q9. Where did you visit and what movie(s) or TV shows prompted the visit(s)?

= Statistically greater than the counterpart group at 95% confidence level

THANK YOU



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