

LOUISIANA

Pick your Passion

Perceptions Research Report

January 16, 2012

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Research Overview

Background

- ◆ The Louisiana Office of Tourism (LOT) promotes visitation to Louisiana through regional advertising and marketing programs. LOT wished to understand perceptions of the state and effectiveness of the advertising among target consumers. The findings reported herein address that request.

Research Objectives

- ◆ Specific objectives of the research include:
 - Measure current perceptions of Louisiana as a leisure travel destination
 - Measure intent to visit in the next 12 months

Methodology

- ◆ MDRG used an Internet panel for the purposes of data collection. The survey was available on MDRG's secure website from December 1-11, 2011, and took an average of 10.8 minutes to complete.

Sample

- ◆ Respondents were recruited from the Research Now Consumer Internet Panel, and screened to ensure that they reflect the target consumer:
 - Are at least 25 years old
 - Have household incomes of \$50,000 or more
 - Take at least two trips per year that include a paid overnight stay
 - Either share equally or are the primary decision maker when making leisure travel plans
 - Are not employed in the travel, market research, marketing or advertising industries
- ◆ Approximately 300 surveys were completed in each of the markets:

	Markets	Number of surveys
Key Target Markets	Atlanta	300
	Dallas/Ft. Worth	300
	Houston	300
	San Antonio	300
	Memphis	251
National Markets	New York	300
	Los Angeles	302
	Chicago	300

Key Findings

Key Findings

Introduction

- ◆ With the goal of understanding how travelers develop perceptions of Louisiana, the results reported herein are divided into several major sections and cover the following topics:
 - Sources of information used to select a leisure travel destination and plan the trip's itinerary
 - Use of Mobile Devices and Printed Materials as information resources
 - Awareness and impact of Advertising (TV, Radio, Print) and Social Media (State's Facebook page and website)
 - Likelihood to visit Louisiana

1. Awareness is critical to selection of a destination; the online experience is critical to the planning of travel.

- ◆ Respondents' selection of a leisure travel destination is heavily influenced by "Word of mouth" from family and friends, and "Travel deals, special offers or coupons" they come across when thinking about travel.
 - About half of respondents said that either "Word of mouth" or "Travel deals" was the number one source of information that caused them to select a particular destination.
 - This suggests the importance the roles of awareness (buzz) and opportunity (value) play in the selection of leisure travel destinations.
- ◆ When planning trips, respondents are most likely to use Search Engines (usually Google) and Travel Websites (usually TripAdvisor).
 - Nearly half of respondents use Search Engines (47%) and Travel Websites (43%).
 - The next most often used source for planning are Travel Booking Engines (mostly Expedia and Travelocity), which were used by 36% of respondents.
- ◆ During the trip, respondents are most apt to use Search Engines (again, Google) and Travel Brochures (usually specific to the location).
 - Just over 3 out of 10 respondents use Search Engines at the leisure destination, and nearly one-quarter use Travel Brochures.
 - Travel Websites are used at the destination by nearly one-fifth of respondents.
- ◆ Before and/or during travel, almost 20% of respondents claim to use Discount/Deal Websites (Groupon, Living Social, and TravelZoo). The most frequent outcome of using a Discount/Deal is to "Experience something that they otherwise would not."
 - Respondents in Los Angeles (13%), Dallas (11%) and Atlanta (10%) are the most likely to say they "Experienced something they otherwise would not have" by using a Discount/Deal Website.
 - Around 6% of respondents in most markets indicated that they "Spend additional money" when they use Discount/Deal Websites.

Key Findings

2. Respondents report heavy use of mobile devices and printed material while travelling.

- ◆ There is widespread use of Mobile Devices (smart phones, laptops and GPS) while traveling – only about 10% of respondents in each market said that they don't use Mobile Devices at all.
 - Memphis respondents are the most likely to use Mobile Devices (92%) and New York respondents are the least likely (86%).

- ◆ Although not as widespread as the use of Mobile Devices, respondents are fairly likely to use Printed Materials (printed maps, brochures and guidebooks) while traveling.
 - On average, just over half of respondents said that they use printed maps and brochures; just under half use guidebooks.
 - About 20% of respondents don't use any Printed Materials at all while traveling.

- ◆ When asked which of the 2 types of resources they prefer – Mobile Devices or Printed Materials – respondents in most markets said that they prefer to use their Mobile Devices.
 - Almost half of Atlanta, Houston, San Antonio and Memphis respondents prefer Mobile Devices to Printed Materials, compared to about 35% who prefer Printed Material. Slightly more than 15% are indifferent between the two.
 - Chicago respondents expressed a preference for Printed Materials (46%) over Mobile Devices (39%).
 - Respondents in Dallas and New York were nearly evenly divided between preference for Mobile Devices (44% Dallas, 42% New York) and Printed Materials (42% Dallas, 44% New York).

3. Markets with higher awareness of Louisiana ads are more favorably impacted by the ads.

- ◆ Louisiana has been effective in generating awareness of the state through advertising.
 - In the regional markets (Dallas, Houston, San Antonio and Memphis), about 8 out of 10 respondents are aware of Louisiana advertising.
 - Atlanta respondents also reported relatively high awareness (71%).
 - The more distant markets – Chicago (63%), New York (56%) and Los Angeles (41%) – have lower levels of awareness; although, at least in Chicago and New York, the majority of respondents are aware.

- ◆ Respondents of markets where ad awareness is highest (Memphis, Dallas and Houston) report being more favorably impacted by the ads than respondents where awareness is lower (New York, Chicago and Los Angeles).
 - Approximately one third of respondents from each of three cities—Memphis, Dallas and Houston—reported a positive impact (sought more information, planned a trip, and/or lengthened their stay) because of the advertising.
 - About one quarter of respondents from San Antonio and Atlanta claimed to have been positively influenced by the ads.
 - Looking at respondents from the more distant markets (New York, Chicago and Los Angeles), smaller percentages of respondents were positively impacted by the ads (about 18%).

4. Given the strong influence of word of mouth from friends/family and the use of the internet for travel planning, social media will likely increase in use and influence in the near future.

- ◆ Currently, respondents report the influence of social media on travel plans to particular states as being lower than that of advertising.
 - Relatively high percentages of Houston (25%), San Antonio (26%) and Dallas (25%) respondents report social media use as impacting their travel plans to other parts of Texas.
 - Respondents from Memphis (27%), Chicago (27%), New York (21%), Atlanta (21%), and Los Angeles (14%) report higher influence from social media in planning travel to Florida than any other state.

Key Findings

5. Louisiana's strengths match up with reasons for selection of destinations.

- ◆ Intent to visit Louisiana is highest among respondents from the three Texas markets, as well as Memphis and Atlanta.
 - Houston respondents reported the highest likelihood to visit Louisiana (50% “top box” – 4-5 on 5-point likelihood scale).
 - Nearly as likely to visit are San Antonio (45% “top box”), Memphis (42% “top box”) and Dallas (41% “top box”) respondents.
 - Respondents in Atlanta (34%), Los Angeles (18%), Chicago (18%) and New York (16%) gave slightly lower “top box” likelihood to visit ratings.

- ◆ Respondents said that they visit Louisiana for its “Cuisine” and to see “A particular city.”
 - Louisiana is highly regarded in all markets for its *restaurants that serve superb, local cuisine*.
 - Dallas (36%), Memphis (29%), Houston (28%) and San Antonio (25%) respondents were especially likely to say they selected Louisiana for the cuisine.
 - When asked which cities/regions of the state they plan to visit, the largest percentages of respondents in each market named “New Orleans.”

- ◆ The reasons respondents provide for opting to take a leisure trip somewhere other than Louisiana can be categorized as “controllable” and “uncontrollable.” Across markets, at least 40% of reasons are “controllable”—reasons that do not exclude Louisiana from consideration. The top “controllable” reasons include:
 - Visit a particular city or area
 - Visit an attraction
 - An event
 - Outdoor activities
 - Meet friends

- ◆ Louisiana has an opportunity to attract additional leisure travelers by communicating some of its strengths for which it is not typically well known and that are important in the selection of a leisure destination.
 - A beautiful and scenic place
 - A variety of outdoor activities
 - Attractions for the whole family

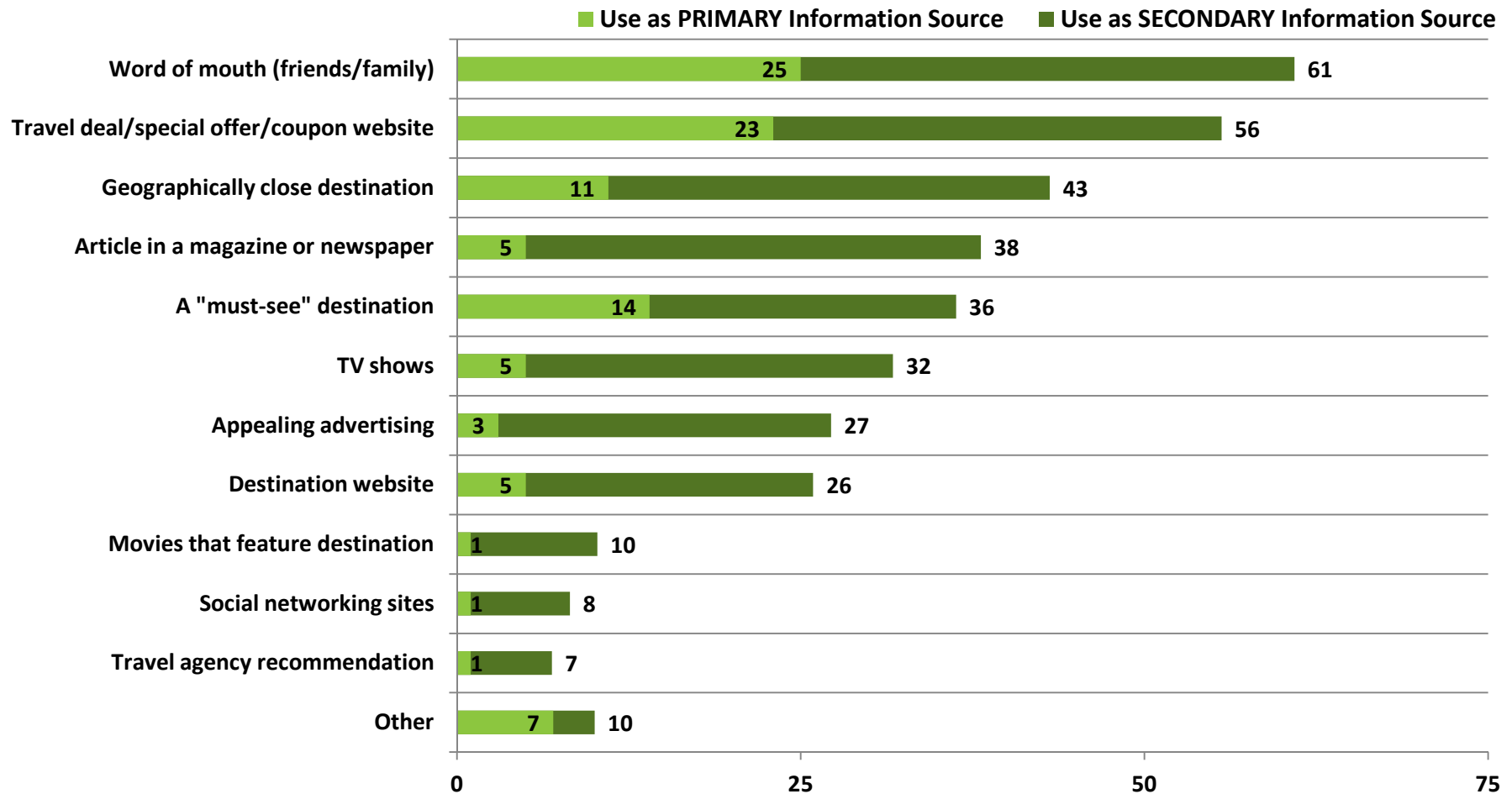
Detailed Findings

⇒ Sources of Information

Sources of Information used to Select Destination

Base: All Respondents
Units: %

Respondents' vacation destinations were most strongly influenced by word of mouth from family and friends. Travel deals/special offers/coupon websites were also highly influential.



Multiple responses allowed.

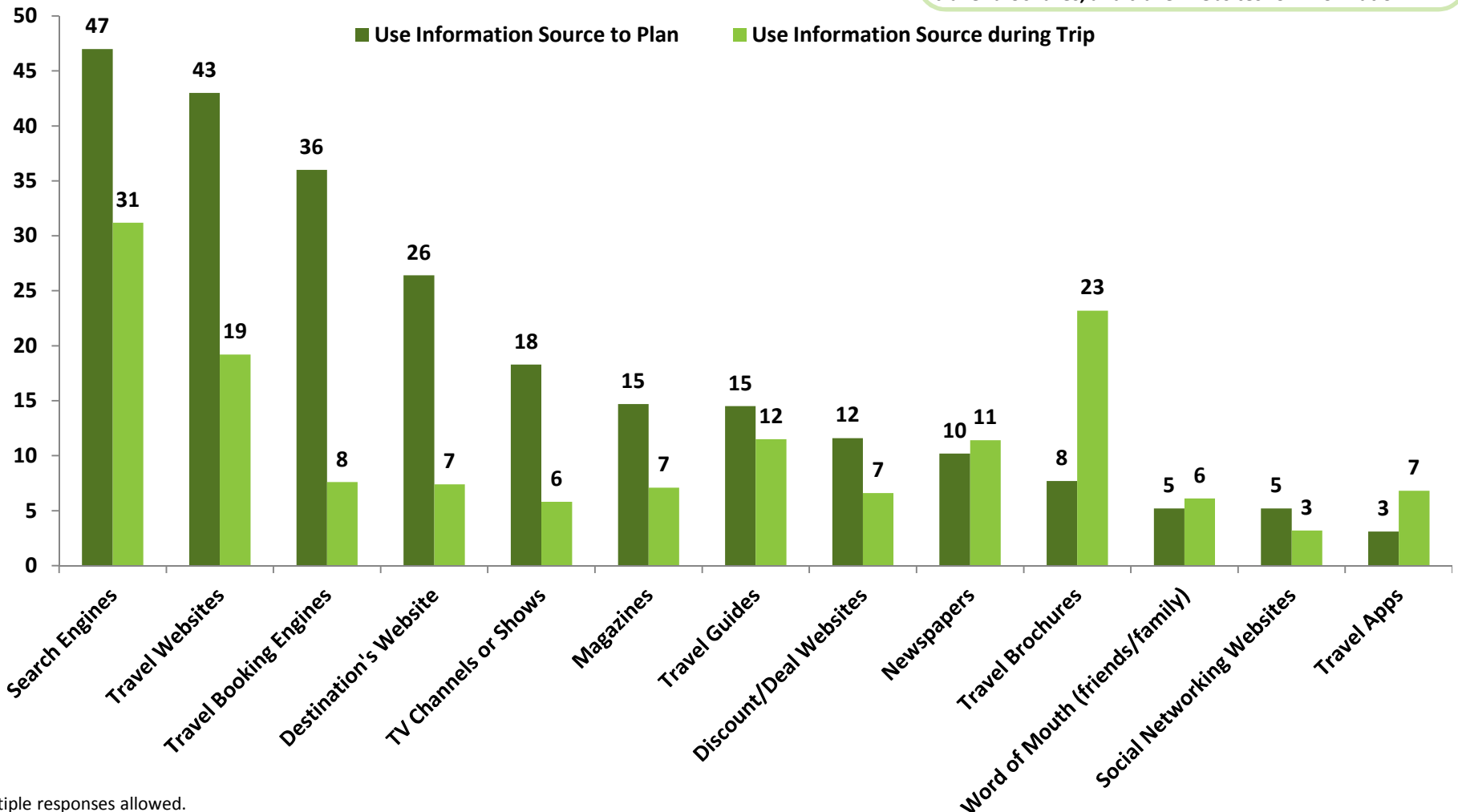
Q9. In the past 12 months, what information sources/destination characteristics did you use in your selection of a destination for your leisure trip(s)?

Q10. Which one information source mostly prompted your selection of a destination for your leisure trip?

Sources of Information Used to Plan Trip and During Trip

Search engines and travel websites were most frequently used by respondents when planning trips. Travel booking engines and destinations' websites were also used by more than one-quarter of respondents. During the trip, respondents were most likely to rely on search engines, travel brochures, and travel websites for information.

Base: All Respondents
Units: %



Multiple responses allowed.

Q11. In the past 12 months, what information sources did you use to help you plan your leisure trip(s)? Please select the type(s) of sources used and specify the name of the source in the box.

Q12. What information sources do you use at your travel destination? Please select the type(s) of sources used and specify the name of the source in the box.

Sources of Information Used to Plan Trip and During Trip

Units: % Page 1 of 5	Atlanta (n=300)		Dallas (n=300)		Houston (n=300)		San Antonio (n=300)		Memphis (n=251)		New York (n=300)		Los Angeles (n=302)		Chicago (n=300)	
	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.
NET: SEARCH ENGINES	44	31	47	30	48	35	48	31	47	30	47	30	52	35	43	27
Google	40	29	41	28	41	32	42	28	41	28	44	29	44	31	39	25
Yahoo	7	5	11	4	12	8	13	7	6	3	2	1	9	5	9	4
Bing	4	<1	4	2	5	4	2	1	3	1	4	2	8	4	3	0
Other	1	1	1	1	2	1	1	1	3	2	1	<1	2	1	1	1
NET: TRAVEL WEBSITES	43	20	41	19	40	17	41	18	38	16	45	21	55	24	44	18
Trip Advisor	24	13	25	10	26	9	24	11	22	11	30	12	32	15	29	12
Hotel Websites	10	2	9	3	8	2	12	2	8	1	8	2	10	2	6	1
AAA	7	3	7	4	4	2	3	4	6	2	8	4	11	4	4	2
Lonely Planet	3	2	5	3	6	3	3	2	3	1	6	4	10	4	6	2
Airline Websites	4	1	4	1	6	1	5	1	3	1	4	<1	6	0	5	0
Other	5	1	8	2	8	5	9	2	4	2	7	2	7	3	7	2

Q11. In the past 12 months, what information sources did you use to help you plan your leisure trip(s)? Please select the type(s) of sources used and specify the name of the source in the box. Q12. What information sources do you use at your travel destination? Please select the type(s) of sources used and specify the name of the source in the box. Multiple responses allowed.

Sources of Information Used to Plan Trip and During Trip

Units: % Page 2 of 5	Atlanta (n=300)		Dallas (n=300)		Houston (n=300)		San Antonio (n=300)		Memphis (n=251)		New York (n=300)		Los Angeles (n=302)		Chicago (n=300)	
	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.
NET: TRAVEL BOOKING ENGINES	37	6	32	8	34	9	30	6	33	7	45	7	40	10	36	8
Expedia	18	5	16	4	17	5	16	4	17	4	23	3	19	5	18	3
Travelocity	16	3	13	6	18	4	10	2	17	4	14	2	16	4	12	3
Orbitz	10	1	9	3	8	2	8	2	11	2	18	1	14	3	15	3
Kayak	4	0	3	<1	3	1	4	0	4	<1	11	1	9	1	7	1
Priceline	4	1	4	1	4	2	5	1	5	<1	3	0	3	<1	3	1
Other	3	1	1	<1	4	<1	2	<1	3	1	2	1	3	1	2	1
NET: DESTINATION'S WEBSITE	28	8	29	11	28	7	29	5	27	5	26	9	23	8	22	6
A City	10	3	12	6	8	3	14	2	8	2	8	3	7	2	8	3
An Attraction	8	2	8	4	10	4	8	1	10	2	9	3	8	3	8	<1
A State	7	1	9	1	8	0	8	1	4	1	6	1	5	1	7	2
An Accommodation	4	1	2	1	2	<1	1	<1	4	<1	3	1	2	1	2	0
Chamber of Commerce	2	<1	3	1	2	<1	3	1	1	0	2	1	2	2	1	1
Country	2	1	2	0	2	<1	1	0	1	0	3	<1	2	<1	3	<1

Q11. In the past 12 months, what information sources did you use to help you plan your leisure trip(s)? Please select the type(s) of sources used and specify the name of the source in the box. Q12. What information sources do you use at your travel destination? Please select the type(s) of sources used and specify the name of the source in the box. Multiple responses allowed.

Sources of Information Used to Plan Trip and During Trip

Units: % Page 3 of 5	Atlanta (n=300)		Dallas (n=300)		Houston (n=300)		San Antonio (n=300)		Memphis (n=251)		New York (n=300)		Los Angeles (n=302)		Chicago (n=300)	
	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.
NET: TV CHANNELS OR SHOWS	18	0	20	0	19	0	23	0	13	0	16	0	21	0	16	0
Travel Channel	13	--	15	--	12	--	18	--	8	--	12	--	13	--	11	--
Food Network	4	--	2	--	4	--	4	--	5	--	2	--	6	--	2	--
Anthony Bourdain	1	--	0	--	2	--	<1	--	0	--	<1	--	1	--	1	--
Other	1	--	3	--	2	--	3	--	2	--	3	--	2	--	3	--
NET: MAGAZINES	18	0	18	0	13	0	15	0	16	0	14	0	14	0	11	0
Travel & Leisure	4	--	3	--	2	--	1	--	2	--	5	--	4	--	3	--
Southern Living	3	--	3	--	1	--	3	--	5	--	1	--	<1	--	<1	--
Budget Travel	3	--	3	--	1	--	2	--	2	--	3	--	2	--	<1	--
Other	8	--	10	--	9	--	11	--	10	--	6	--	9	--	7	--
NET: TRAVEL GUIDES	13	9	18	12	10	10	12	12	12	10	19	14	17	10	15	14
Frommers	6	5	8	5	5	4	7	4	5	2	11	7	10	5	3	4
Fodors	5	3	8	6	4	4	5	6	6	5	7	6	4	2	10	8
Other	3	1	3	1	1	3	3	4	3	3	2	2	4	2	3	2

Q11. In the past 12 months, what information sources did you use to help you plan your leisure trip(s)? Please select the type(s) of sources used and specify the name of the source in the box. Q12. What information sources do you use at your travel destination? Please select the type(s) of sources used and specify the name of the source in the box. Multiple responses allowed.

Sources of Information Used to Plan Trip and During Trip

Units: % Page 4 of 5	Atlanta (n=300)		Dallas (n=300)		Houston (n=300)		San Antonio (n=300)		Memphis (n=251)		New York (n=300)		Los Angeles (n=302)		Chicago (n=300)	
	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.
NET: DISCOUNT/DEAL WEBSITES	10	8	12	9	12	8	12	3	14	2	11	5	13	12	9	6
Groupon	7	7	9	7	9	7	9	2	10	1	8	3	10	9	7	5
Living Social	4	3	4	3	4	2	3	<1	6	0	2	1	5	4	2	1
Travel Zoo	2	<1	1	0	<1	0	1	<1	1	0	1	0	2	<1	1	0
Other	1	1	2	1	1	1	1	1	1	<1	1	1	2	2	1	1
NET: NEWSPAPERS	7	12	14	11	7	12	8	14	5	10	9	8	14	12	17	13
New York Times	1	0	<1	0	1	<1	0	<1	2	<1	8	2	1	<1	4	<1
L.A. Times	<1	0	0	0	0	0	0	0	0	0	0	0	10	1	0	0
Chicago Tribune	0	0	0	0	0	0	0	0	0	0	0	0	0	0	10	3
Dallas Morning News	0	0	8	1	0	0	<1	0	0	0	0	0	0	0	0	0
Houston Chronicle	0	0	0	0	5	1	<1	0	0	0	0	0	0	0	0	0
Atlanta Journal Constit.	5	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Local Newspaper	0	10	0	10	1	9	2	13	<1	8	0	6	<1	10	<1	10
Other	1	1	6	<1	1	1	7	1	3	1	1	<1	3	1	3	0

Q11. In the past 12 months, what information sources did you use to help you plan your leisure trip(s)? Please select the type(s) of sources used and specify the name of the source in the box. Q12. What information sources do you use at your travel destination? Please select the type(s) of sources used and specify the name of the source in the box. Multiple responses allowed.

Sources of Information Used to Plan Trip and During Trip

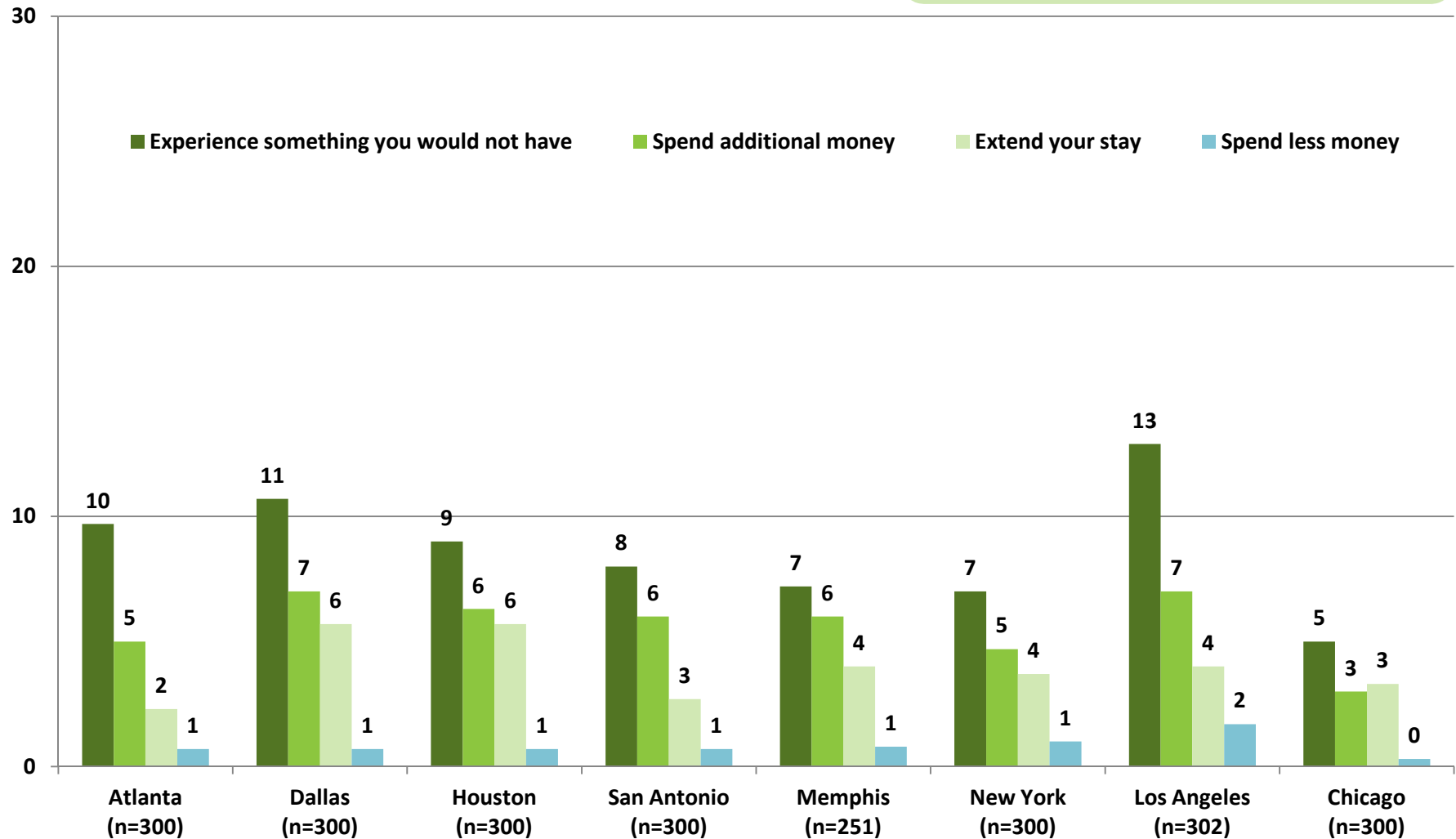
	Atlanta (n=300)		Dallas (n=300)		Houston (n=300)		San Antonio (n=300)		Memphis (n=251)		New York (n=300)		Los Angeles (n=302)		Chicago (n=300)	
	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.	To Plan	At Dest.
NET: TRAVEL BROCHURES	5	23	9	23	8	25	9	27	10	22	7	21	6	20	8	22
Location Specific	2	2	3	5	2	5	2	5	1	2	2	3	2	3	3	5
Ordered from the State	<1	0	1	0	1	0	2	<1	1	0	1	0	1	<1	<1	<1
Provided by Travel Agent	1	<1	1	<1	1	2	1	<1	2	<1	1	<1	2	0	1	<1
Other (Hotels/Welcome Centers)	2	20	4	21	4	19	4	23	6	21	3	14	2	16	4	16
NET: SOCIAL NETWORKING WEBSITES	6	3	5	2	5	3	5	3	6	4	6	5	7	2	3	2
Facebook	6	3	5	2	4	2	5	3	6	4	5	5	5	2	2	2
Twitter	<1	0	1	0	1	1	0	0	0	<1	1	1	1	<1	1	1
Foursquare	0	0	0	0	0	1	0	0	0	0	<1	1	<1	0	0	0
Other	<1	0	0	0	0	0	0	0	0	0	<1	0	0	0	0	0
NET: TRAVEL APPS	3	4	3	6	3	5	3	9	4	8	3	7	4	9	2	5
Yelp	2	2	1	2	1	2	<1	2	1	3	2	3	3	6	<1	2
Other	2	2	3	5	2	4	3	9	3	7	2	3	1	5	2	3

Q11. In the past 12 months, what information sources did you use to help you plan your leisure trip(s)? Please select the type(s) of sources used and specify the name of the source in the box. Q12. What information sources do you use at your travel destination? Please select the type(s) of sources used and specify the name of the source in the box. Multiple responses allowed.

Benefits Derived from Discount/Deal Websites

Across markets, discount/deal websites' strongest effect was enabling respondents to experience something they otherwise would not have. Most respondents did not feel that these websites helped them to save money.

Units: %



Q13. You indicated that you have used a discount/deal website to help you select and/or plan your leisure travel. Because of the discount/deal, did you... (Check all that apply.)

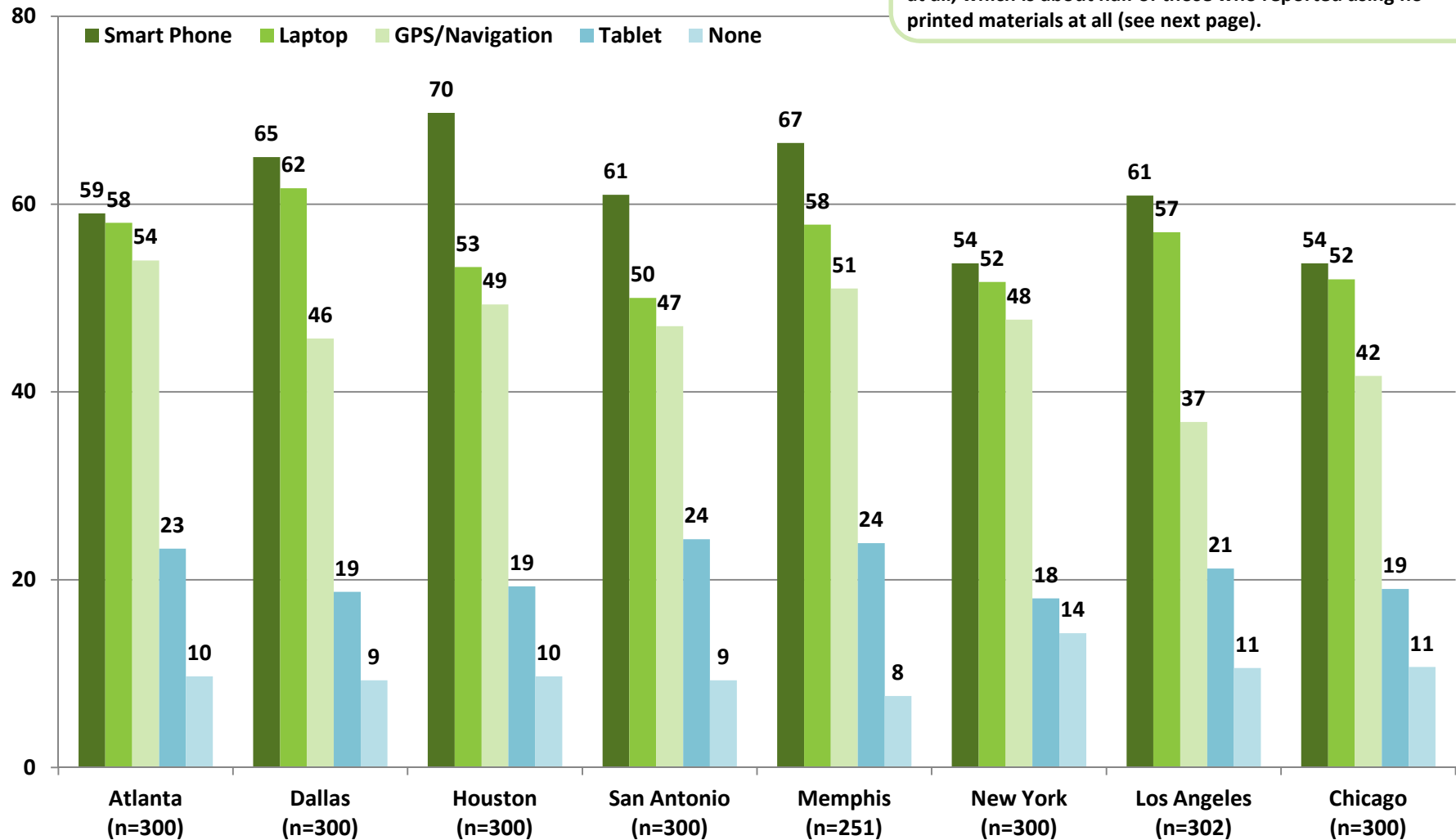
Multiple responses allowed.

Detailed Findings

⇒ Use of Mobile Devices and Printed Materials while Traveling

Mobile Devices Used while Traveling

Units: %



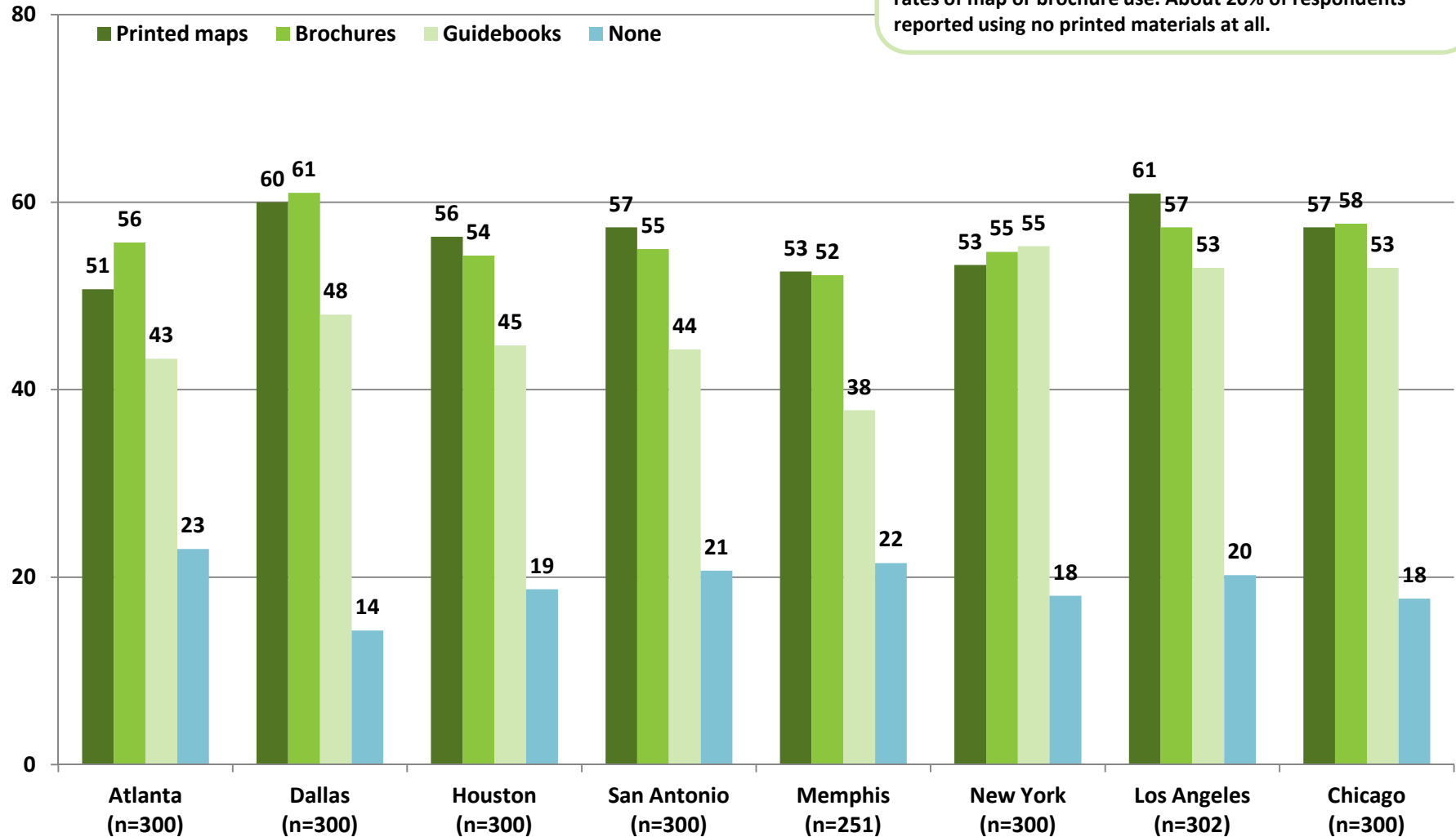
Respondents across markets were most likely to report using a smart phone, laptop, and GPS while traveling; respondents were less likely to report using a tablet. Only about 10% of respondents across markets reported using no mobile devices at all, which is about half of those who reported using no printed materials at all (see next page).

Q14. What types of mobile devices, if any, do you use while traveling for leisure/pleasure? Please indicate the devices you use for help planning your trip; do not include any devices used for work or reasons other than your leisure trip. (Check all that apply.) Multiple responses allowed.

Printed Materials Used while Traveling

Across most markets, respondents were most likely to report relying on printed maps and brochures while traveling. Respondents also reported using guidebooks, though rates of guidebook use are more variable across markets compared to rates of map or brochure use. About 20% of respondents reported using no printed materials at all.

Units: %

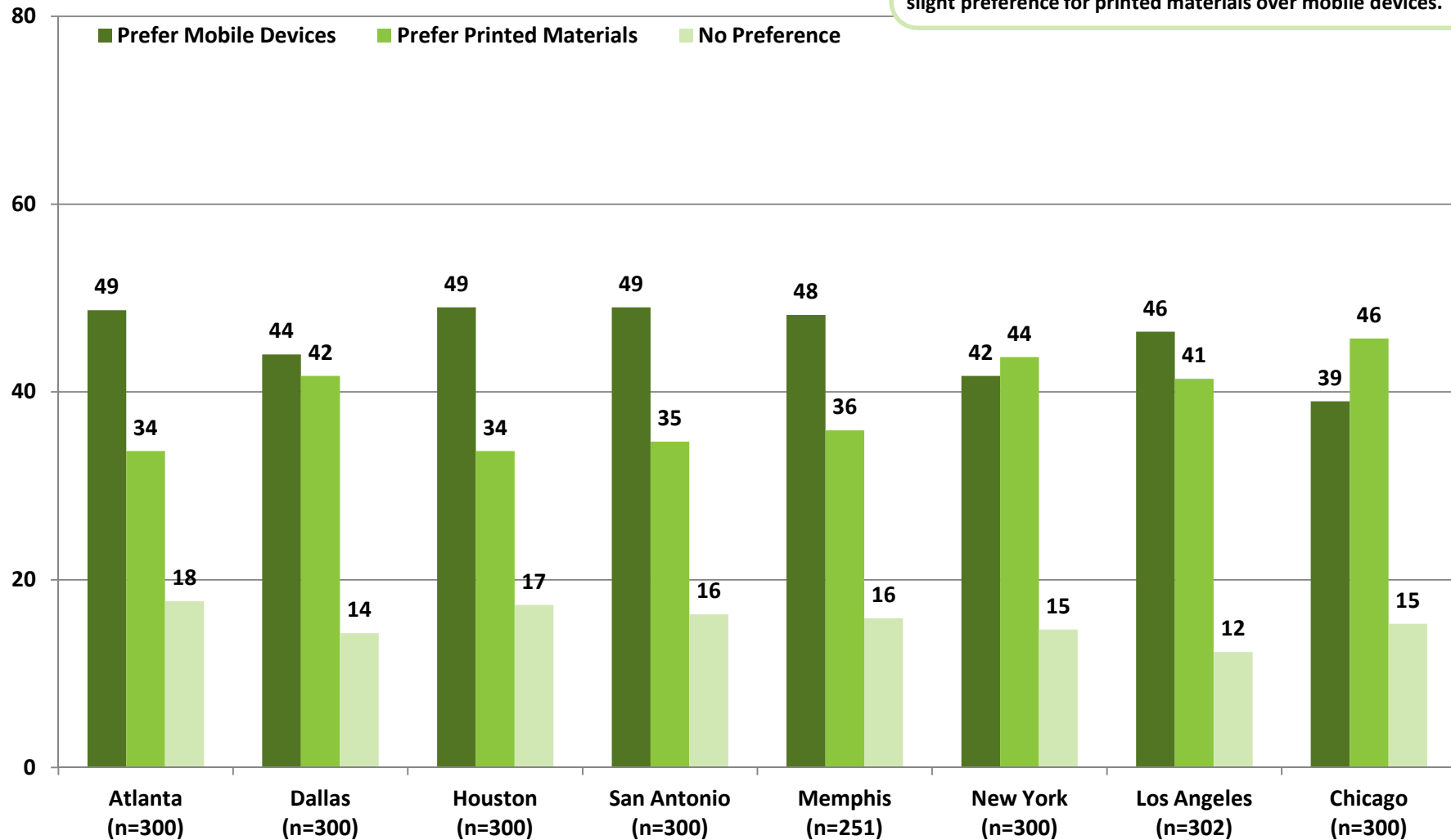


Q15. What types of printed materials, if any, do you use while traveling? (Check all that apply.)

Multiple responses allowed.

Preference for: Mobile Devices/Printed Materials

Units: %



Atlanta, Houston, San Antonio and Memphis respondents prefer to use mobile devices while traveling slightly more than they prefer printed materials. In contrast, New York and Chicago respondents showed a slight preference for printed materials over mobile devices.

Q16. You indicated that when you are traveling you use mobile/electronic devices like smart phones and computers AND you also use printed materials. Which do you prefer?

Detailed Findings

⇒ Importance of and Louisiana's Performance on Leisure Travel Attributes

Leisure Travel Attributes

Introduction

- ◆ All respondents rated the importance of 13 leisure travel attributes and Louisiana's performance on the attributes.
- ◆ The attributes rated are:
 - A variety of historical and cultural attractions
 - Restaurants that offer superb, local cuisine
 - Unique shopping opportunities
 - Exciting gaming and nightlife venues
 - Attractions the whole family, including children, can enjoy
 - Unique experiences that you cannot get anywhere else
 - A variety of outdoor activities such as hunting, fishing, camping, golf, biking and hiking
 - Interesting fairs and festivals
 - A good value, that is accommodations and activities priced right for me
 - A safe and secure place
 - A beautiful and scenic place
 - Great live music & entertainment
 - Easy to access via interstate or air travel

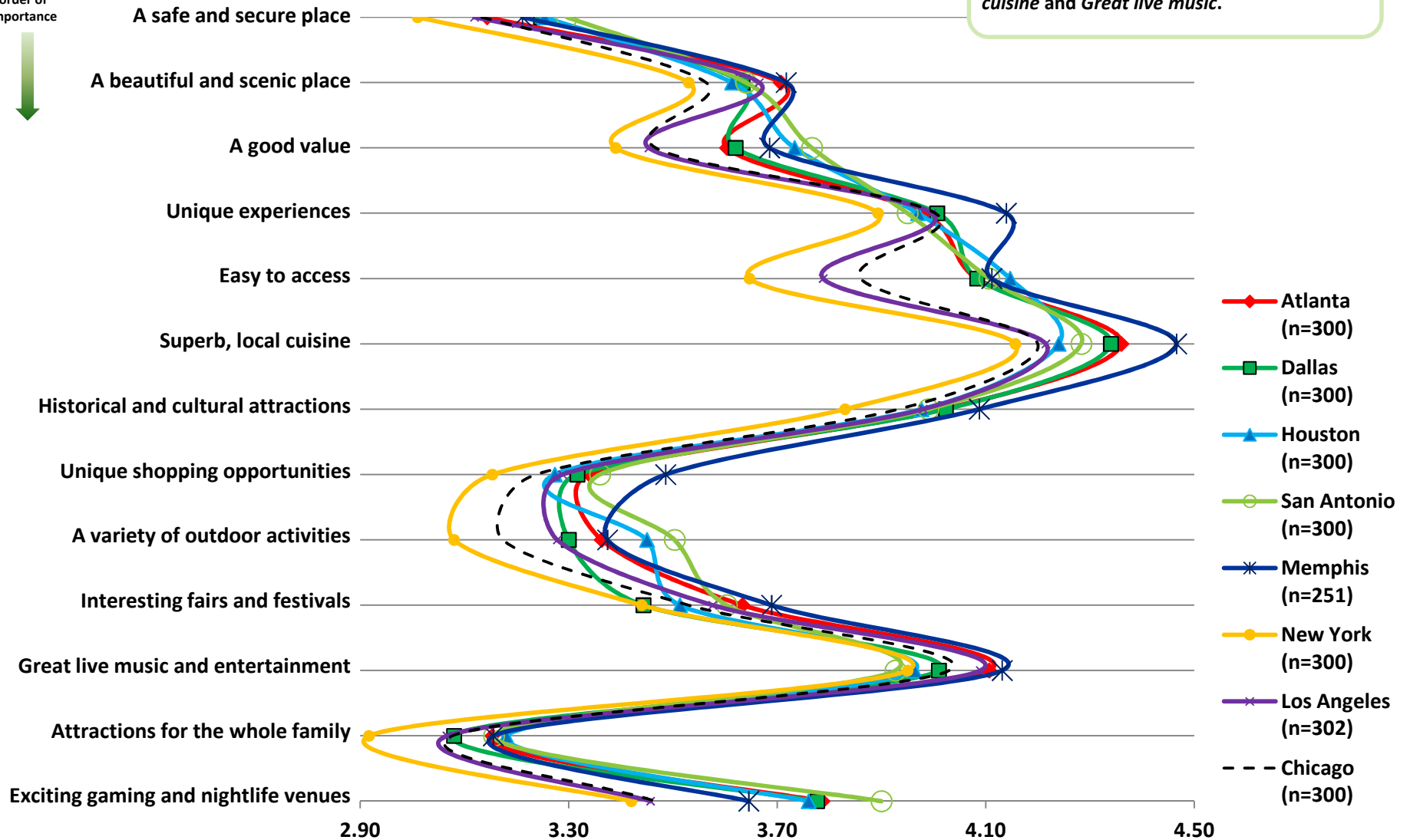
Perceptions of Louisiana on Leisure Travel Attributes

Units: Average on 5-point scale

Descending order of importance



Respondents across markets have relatively high perceptions of Louisiana's *Superb local cuisine* and *Great live music*.



Q8. Using a scale from 1 to 5 where "1" means you strongly disagree and "5" means you strongly agree, please pick any number from 1 to 5 to indicate the extent to which you agree with the following statements about Louisiana TODAY.

Likelihood to Visit and Importance of Louisiana Attributes

Units: Average on scale from 1-5

Importance of:	Not Likely to Visit Louisiana (n=1582)	Likely to Visit Louisiana (n=771)
A safe and secure place	4.35	4.42
A beautiful and scenic place	4.34	4.37
A good value	4.27	4.37
Unique experiences	4.01	4.17
Easy to access	3.97	4.08
Superb, local cuisine	3.84	4.13
Historical and cultural attractions	3.76	3.92
Unique shopping opportunities	3.07	3.27
A variety of outdoor activities	3.09	3.07
Interesting fairs and festivals	2.98	3.22
Great live music and entertainment	2.91	3.28
Attractions for the whole family	2.99	2.91
Exciting gaming and nightlife venues	2.52	3.12

 =Significantly higher than "Not Likely" at 95% confidence level

Overall, respondents who value the strengths Louisiana has to offer are more likely to express an interest in visiting Louisiana than those who do not.

Shaded Attributes/Boxed Values:

Respondents likely to visit find these attributes more important than respondents not likely to visit. This suggests that likely visitors appreciate these qualities and are drawn to Louisiana because of them.

Non-Shaded Attributes/Non Boxed Values:

These attributes are not attracting larger percentages of respondents who value the attributes suggesting a lack of awareness of or appreciation for the attributes. Strengthening awareness and perceptions of the following attributes presents Louisiana with an opportunity to improve interest among non-likely visitors:

- A safe and secure place
- A beautiful and scenic place
- A variety of outdoor activities
- Attractions for the whole family

Q7. The table below contains a list of phrases that could be used to describe a leisure travel destination. Think for a moment about when you are planning a leisure trip. Using a scale from 1 to 5 where "1" means the phrase is not at all important and "5" means the phrase is extremely important, please pick any number from 1 to 5 to indicate how important the phrase is to you in terms of what you want from a leisure destination.

Detailed Findings

⇒ Awareness and Impact of Advertising and Social Media

Awareness and Impact of Advertising Usage and Impact of Social Media

Introduction

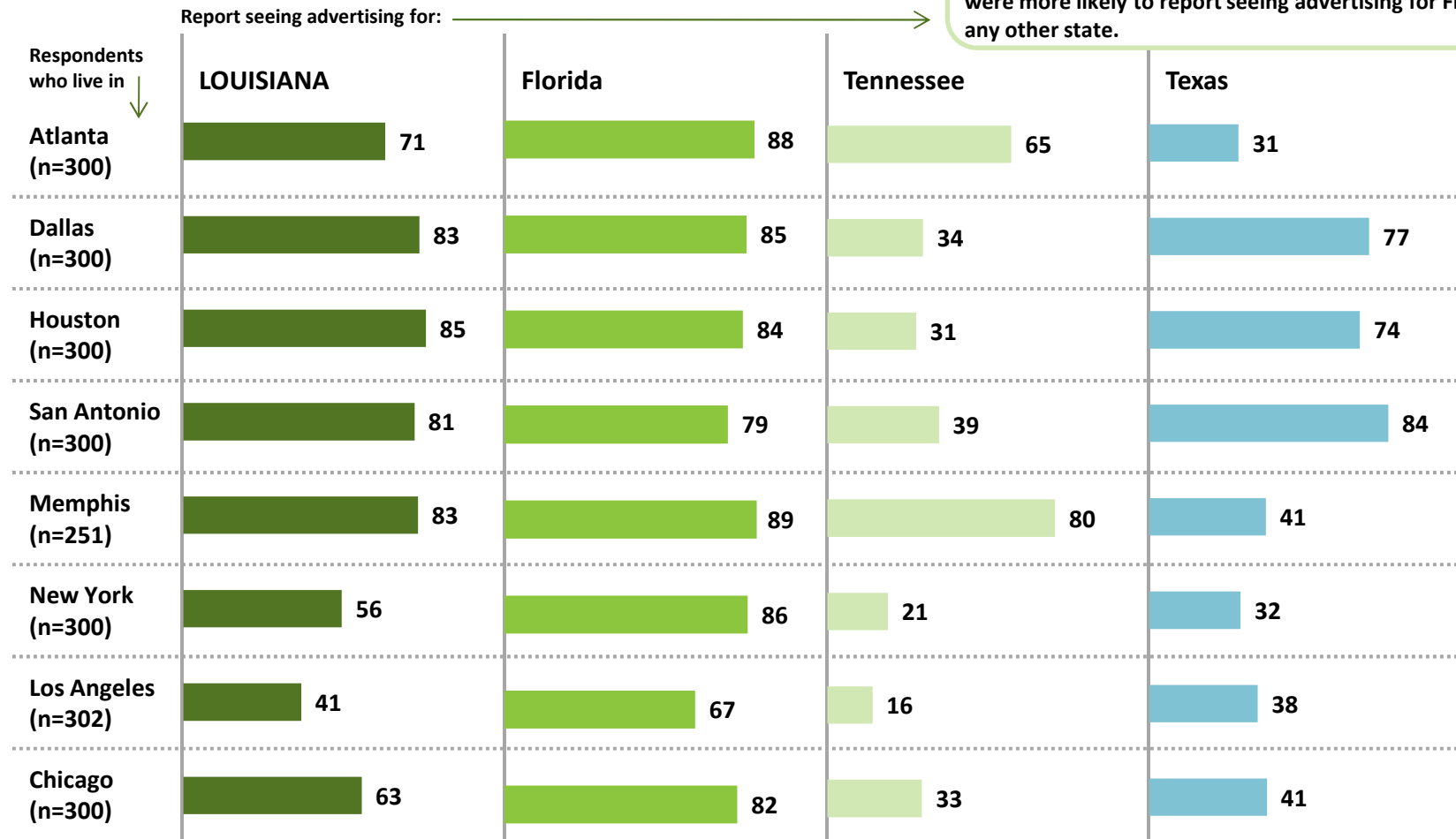
- ◆ A chief reason to invest in advertising is to generate awareness of the brand. Awareness is a prerequisite for considering or selecting the brand, and is often at least partially responsible for perceptions of the brand. Given the importance of awareness, the current research measures awareness of the media campaign, “Pick Your Passion,” in several ways:
 - **Awareness of the advertising:** Respondents were presented with a list of states (Louisiana and competitors – Florida, Tennessee and Texas) and asked to select ones for which they had seen travel advertising.
 - **Usage of Websites/Facebook pages:** Respondents were presented with the same list of states and asked to select ones for which they had used websites or Facebook pages.
 - **Impact of the advertising/social media (websites/Facebook pages):** In order to measure the stated impact of the advertising/social media, respondents aware of ads/familiar with social media were asked if the advertising/social media caused them to:
 - Seek more information
 - Plan a leisure trip
 - Lengthen their stay and/or visit additional attractions
 - Decide that the state was not a destination for them

Aware of Advertising: Louisiana and Competitors



Units: % Yes

Respondents from Dallas, Houston, San Antonio, and Memphis, along with being likely to see advertising for their home states, were also likely to see advertising from Louisiana and Florida. Respondents from Atlanta, New York, Los Angeles, and Chicago were more likely to report seeing advertising for Florida than any other state.



Q1. Please indicate whether you have seen any travel or tourism advertising/promotions for the following states in the past six months. Please consider any advertising for areas, attractions, or cities within each state as advertising for that state.

Impact of Advertising on Leisure Travel Plans



Louisiana's advertising had the most positive impact on respondents from Memphis, Dallas and Houston.

Respondents who live in:

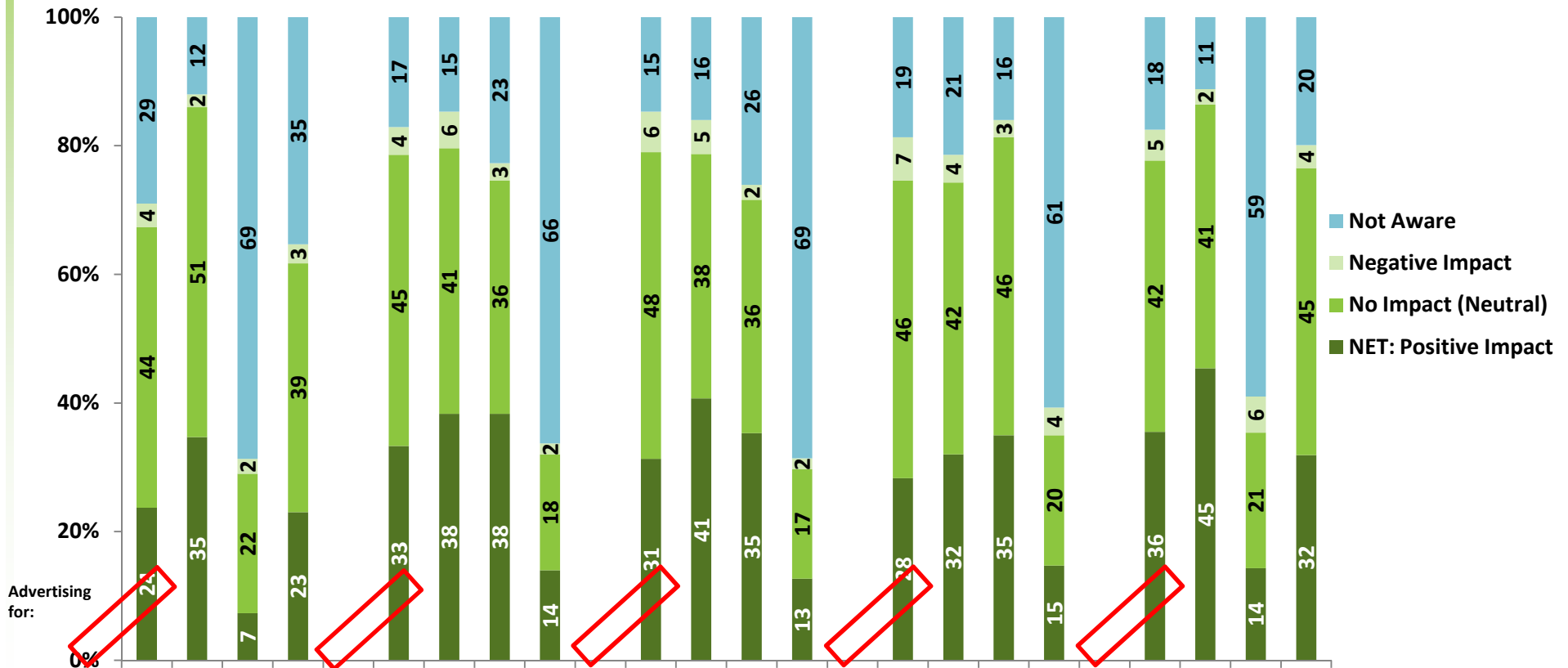
ATLANTA
(n=300)

DALLAS
(n=300)

HOUSTON
(n=300)

SAN ANTONIO
(n=300)

MEMPHIS
(n=251)



Positive Impact
Seek more information and/or Plan a leisure trip and/or Lengthen stay/Visit additional attractions

Negative Impact
Decide was not the place to visit

Q2. How has the advertising you've seen or heard affected your leisure travel plans? Please select all of the statements that describe you.

Impact of Advertising on Leisure Travel Plans

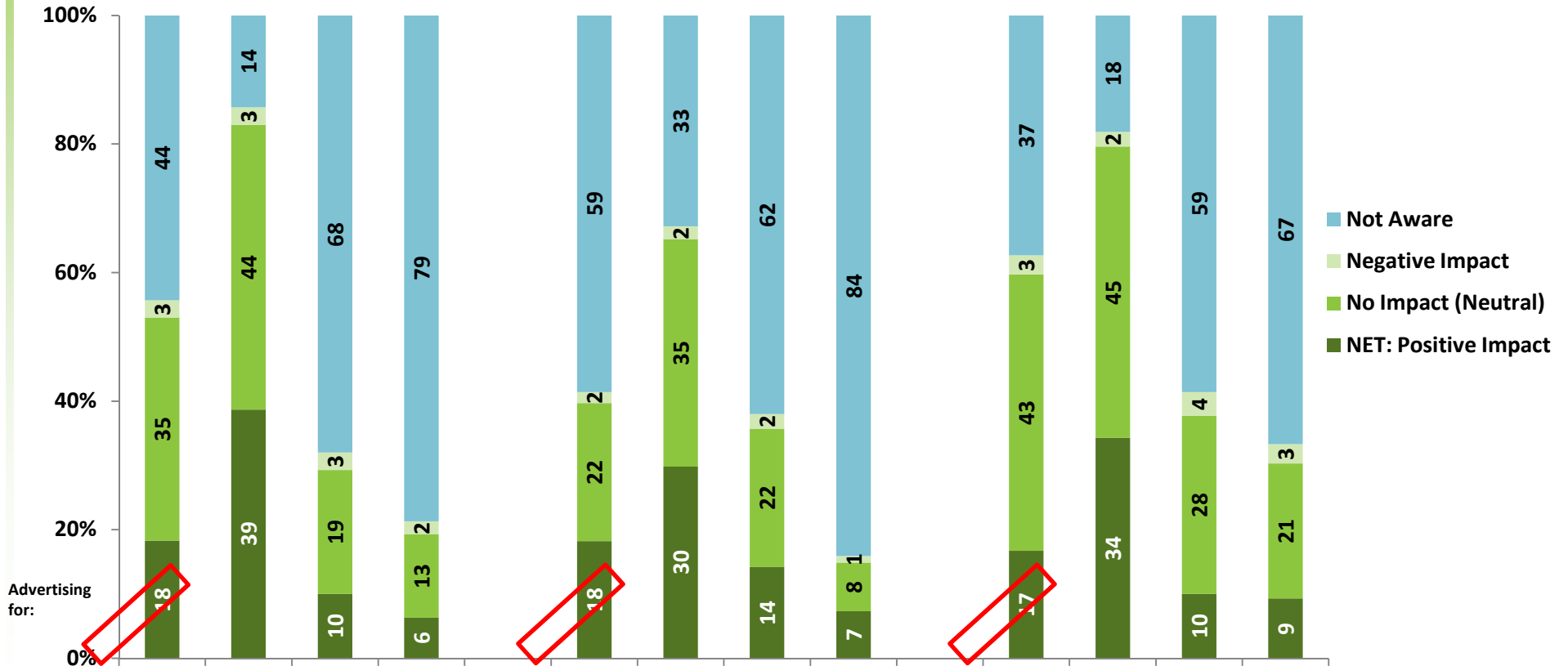
Respondents who live in:

About one-fifth of respondents from New York, Los Angeles and Chicago reported that Louisiana's advertising had a positive impact.

NEW YORK
(n=300)

LOS ANGELES
(n=302)

CHICAGO
(n=300)



Positive Impact
Seek more information and/or Plan a leisure trip and/or Lengthen stay/Visit additional attractions

Negative Impact
Decide was not the place to visit

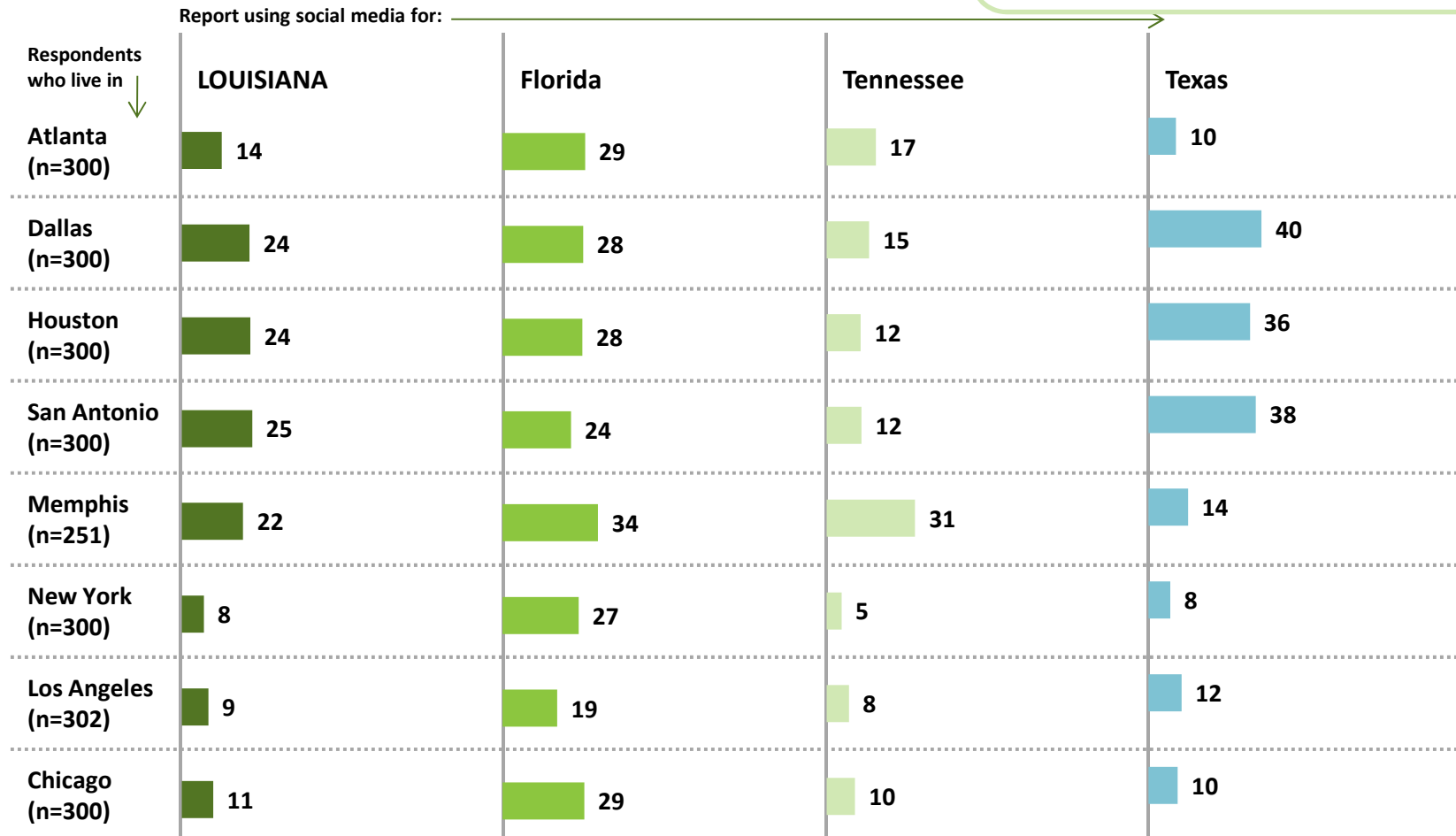
Q2. How has the advertising you've seen or heard affected your leisure travel plans? Please select all of the statements that describe you.

Usage of Social Media: Louisiana and Competitors



Base: All Respondents
Units: % Yes

Respondents from the Texas markets, along with being likely to have used social media for Texas, were also likely to have used social media for Louisiana and Florida. Respondents from Atlanta, New York, Los Angeles, and Chicago were more likely to report having used social media for Florida than any other state.



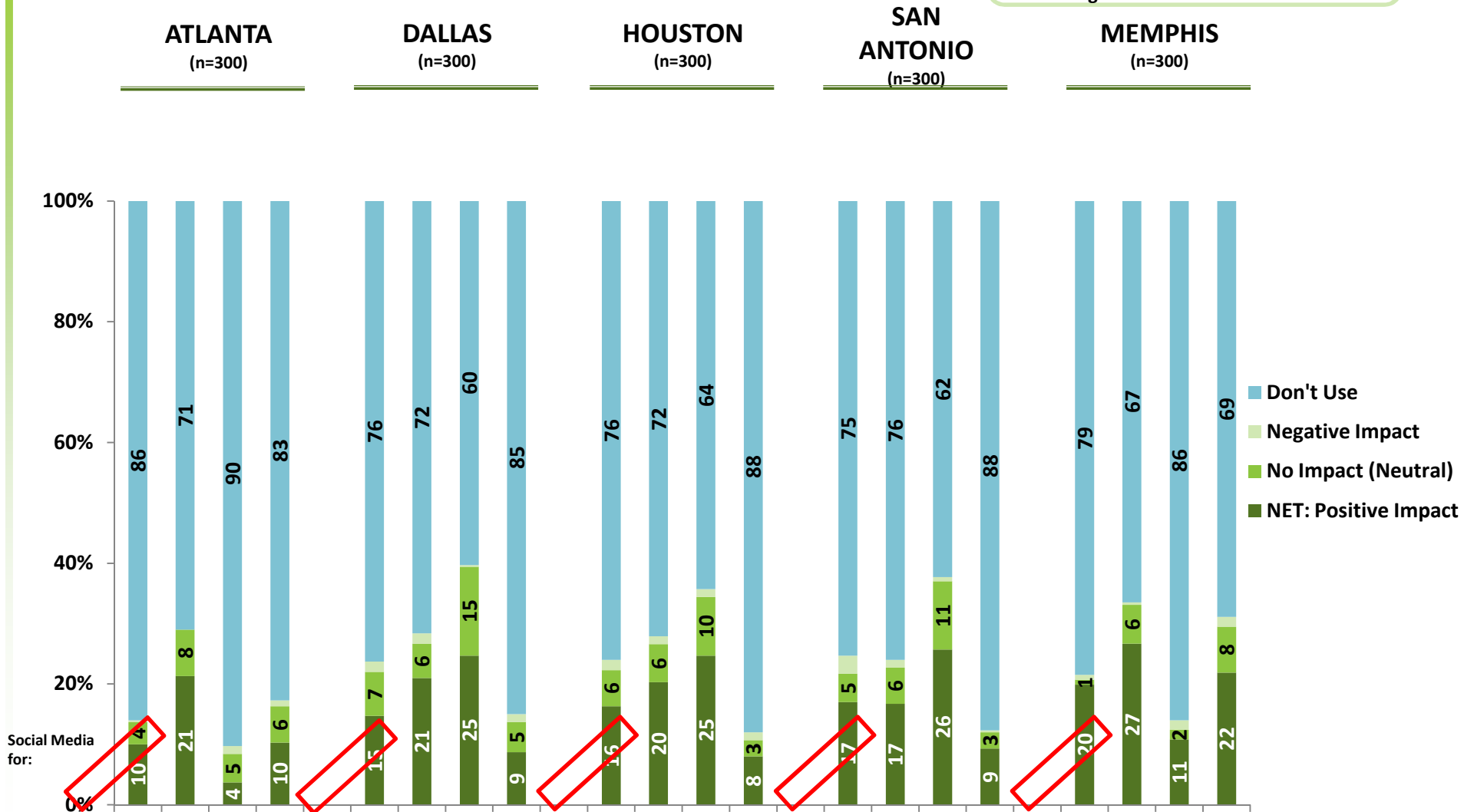
Q3. Please indicate if you have used social media for the following states in the past six months. Please consider websites or Facebook pages for areas, attractions or cities within each state as social media for that state.

Impact of Social Media on Leisure Travel Plans



Memphis, San Antonio, Houston and Dallas respondents were more likely than Atlanta respondents to report a positive impact from using Louisiana's social media.

Respondents who live in:



Social Media for:

Positive Impact
 Seek more information and/or Plan a leisure trip and/or Lengthen stay/Visit additional attractions
Negative Impact
 Decide was not the place to visit

Q4. How has the social media (websites, Facebook) affected your leisure travel plans? Please select all of the statements that describe you.

Impact of Social Media on Leisure Travel Plans

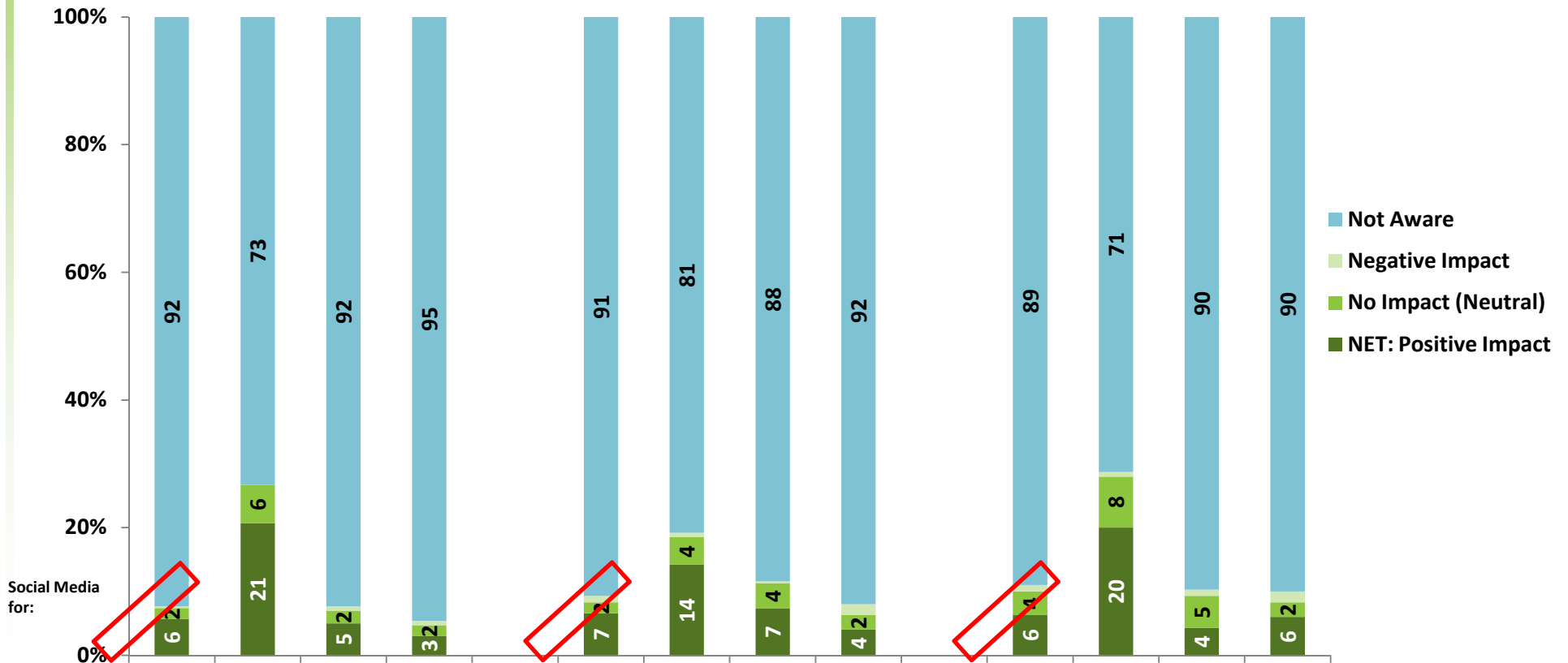
Respondents who live in:

Respondents from New York, Los Angeles and Chicago are mostly unlikely to have used Louisiana's social media.

NEW YORK
(n=300)

LOS ANGELES
(n=302)

CHICAGO
(n=300)



Positive Impact

Seek more information and/or Plan a leisure trip and/or Lengthen stay/Visit additional attractions

Negative Impact

Decide was not the place to visit

Q4. How has the social media (websites, Facebook) affected your leisure travel plans? Please select all of the statements that describe you.

Detailed Findings

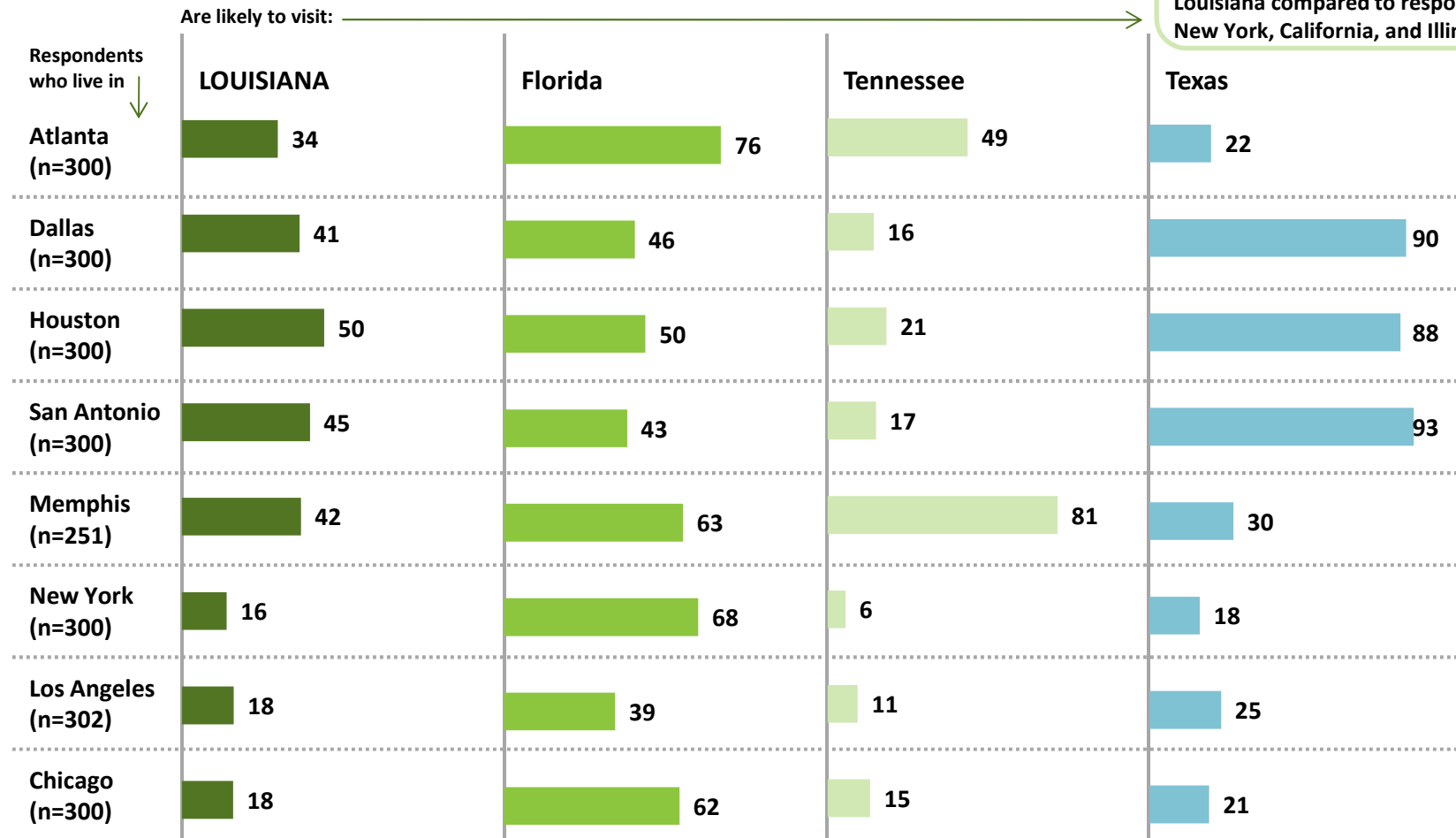
⇒ Likelihood to Visit Louisiana

Likelihood to Visit Louisiana and Competitor States



Respondents from Texas are about as likely to visit Louisiana as they are to visit Florida in the next 12 months. Respondents from southern states are more likely to visit Louisiana compared to respondents from New York, California, and Illinois.

Units: % "top box" (4-5 on 5-point scale)



Q6. Using a scale from 1 to 5 where "1" means not at all likely and "5" means extremely likely, please pick any number from 1 to 5 to indicate how likely you are to visit the following states for leisure or pleasure in the next 12 MONTHS:

Reasons for Selecting Travel Destinations Other Than Louisiana

Most of the reasons that respondents give for selecting a destination to visit other than Louisiana are things that Louisiana has to offer, and should communicate.

Units: %

Reasons for selecting travel destination other than Louisiana:	Atlanta (n=300)	Dallas (n=300)	Houston (n=300)	San Antonio (n=300)	Memphis (n=251)	New York (n=300)	Los Angeles (n=302)	Chicago (n=300)
NET: CONTROLLABLE	45	45	37	43	45	63	59	59
Visit a city/area	25	22	21	23	18	30	30	31
Visit attraction	17	17	17	11	17	21	22	22
Event	13	13	7	12	15	16	16	17
Outdoor activities	8	10	10	10	6	16	16	13
Meet friends	9	11	8	5	12	12	12	11
Cuisine	3	4	2	2	1	6	5	4
New experience	1	1	<1	1	<1	3	1	2
Cruise	2	1	<1	2	<1	1	1	1
Discounts/Deals	1	<1	<1	1	<1	2	1	1
NET: UNCONTROLLABLE	22	23	20	19	16	36	32	32
Visit friends/family	20	21	17	17	14	31	29	28
Climate/Weather	0	0	1	<1	<1	3	0	2
Past experience	0	<1	2	1	0	1	1	1
Own Property/Timeshare	1	1	0	<1	<1	<1	1	1
Other	1	2	0	1	1	2	1	2
NO LEISURE TRIPS PLANNED	13	10	8	7	10	10	15	14

Multiple responses allowed.

Q20. What led you to select your leisure travel destination? (Select all that apply.)

Area of Louisiana Plan to Visit in next 12 Months

Units: %

Respondents from Dallas, Houston, San Antonio, and Memphis are the most likely to visit Louisiana in the next 12 months. Among those respondents who plan to visit Louisiana in the next 12 months, New Orleans is the most popular destination.

Area of Louisiana plan to visit in next 12 months:	Atlanta (n=300)	Dallas (n=300)	Houston (n=300)	San Antonio (n=300)	Memphis (n=251)	New York (n=300)	Los Angeles (n=302)	Chicago (n=300)
New Orleans	29	30	34	31	38	15	16	17
Southwest Louisiana	3	8	26	21	3	1	4	2
Baton Rouge	7	8	12	7	6	1	6	4
North Louisiana	3	19	7	9	4	--	3	1
Central Louisiana	2	5	3	2	--	--	2	1
None, do not plan to visit Louisiana in next 12 months	66	59	50	55	58	84	82	82



=Largest percentage of respondents in the market



=Second largest percentage of respondents in the market

Multiple responses allowed.


Q17 Earlier you indicated that you are likely to visit Louisiana. Which of the following areas of Louisiana do you plan to visit? (Select all that apply.)


Reasons for Selecting Louisiana as Travel Destination

Respondents from Dallas, Houston, San Antonio, and Memphis (who, as seen on the previous page, are the most likely to visit Louisiana), are most likely to visit Louisiana for its cuisine.

Units: %

Reasons for selecting Louisiana as a leisure travel destination:	Atlanta (n=300)	Dallas (n=300)	Houston (n=300)	San Antonio (n=300)	Memphis (n=251)	New York (n=300)	Los Angeles (n=302)	Chicago (n=300)
Eat Louisiana cuisine	20	26	28	25	29	10	13	14
See Louisiana city	12	19	19	17	22	9	12	13
Visit Louisiana attraction	8	17	17	16	14	3	8	8
Listen to Louisiana music	8	13	13	12	12	7	7	7
Attend festival/fair in Louisiana	10	8	10	8	10	4	8	4
Friends/family in Louisiana	9	9	12	11	10	1	3	3
Meet friends in Louisiana	7	3	8	6	5	2	1	2
Visit Louisiana casino	2	3	8	9	<1	0	<1	0
Hunt and fish in Louisiana	1	3	3	2	2	2	1	<1
Other	5	3	6	5	7	2	1	1

 =Largest percentage of respondents in the market

 =Second largest percentage of respondents in the market

Multiple responses allowed.

Q18 What led you to select Louisiana as a leisure travel destination? (Select all that apply.)

Respondent Profile

Respondent Profile

	A. Atlanta (n=300)	B. Dallas (n=300)	C. Houston (n=300)	D. San Antonio (n=300)	E. Memphis (n=251)	F. New York City (n=300)	G. Los Angeles (n=302)	H. Chicago (n=300)
Educational Attainment								
No college	3.3	3.7	3.0	3.0	3.6	4.3	1.7	3.3
Some college	15.0	19.0	17.3	22.0 ^{AEFH}	13.9	14.0	16.9	13.7
College graduate or more	81.7 ^D	77.3	79.7	75.0	82.5 ^D	81.7 ^D	81.5	83.0 ^D
Race/Ethnicity								
White	80.3 ^G	80.3 ^G	74.3	81.7 ^{CG}	83.7 ^{CG}	83.7 ^{CG}	71.2	89.3 ^{ABCDG}
Black/African-American	13.0 ^{BCDFGH}	6.7 ^D	7.3 ^{DGH}	3.0	12.4 ^{BDFGH}	4.3	3.3	3.7
Other	6.7	13.0 ^{AEH}	18.3 ^{AEFH}	15.3 ^{AEH}	4.0	12.0 ^{AEH}	25.5 ^{ABCDEFH}	7.0
Household Income								
\$50K to under \$75K	22.0 ^G	16.3	18.3	17.3	19.9	16.7	15.6	17.3
\$75K to under \$100K	24.3	27.0	24.7	27.7 ^F	26.7	20.7	23.8	24.7
\$100k to under \$125k	20.0	22.0	16.7	20.0	20.7	20.3	18.2	23.3 ^C
\$125k and over	33.7	34.7	40.3	35.0	32.7	42.3 ^{AE}	42.4 ^{AE}	34.7
Household Composition								
Single, no children	16.0	14.7	17.7 ^D	11.7	21.1 ^{BD}	25.3 ^{ABCDH}	18.9 ^D	15.7
Single, with children	3.3	4.7	3.0	3.0	3.2	3.7	3.0	3.7
Married, no children	53.0 ^F	58.3 ^{EF}	50.7	61.0 ^{ACEFGH}	47.8	44.0	45.7	51.3
Married, with children	27.7	22.3	28.7	24.3	27.9	27.0	32.5 ^{BD}	29.3 ^B
Age								
25-39	20.3	24.7	27.0 ^{DE}	18.3	18.3	27.0 ^{DE}	27.2 ^{ADE}	27.3 ^{ADE}
40-54	34.0	30.0	33.0	30.0	37.8	33.3	34.4	34.0
55-69	41.3 ^G	38.7	33.7	43.7 ^{CFGH}	39.4	34.7	33.4	35.0
70 and older	4.3	6.7	6.3	8.0	4.4	5.0	5.0	3.7
Gender								
Female	55.7	53.3	53.7	51.0	55.8	63.0 ^{BCDH}	58.3	51.3
Male	44.3	46.7 ^F	46.3 ^F	49.0 ^F	44.2	37.0	41.7	48.7 ^F

Appendix

⇒ Questionnaire (Separate Document)

Thank you