

A grayscale photograph of a woman with dark hair tied back, looking down at a tablet computer she is holding with both hands. The background is a brick-paved surface. The entire image is framed by a thick cyan border.

Louisiana Office of Tourism

Louisiana TV + Film Industry
Impact on Tourism
Research 2021

April 5, 2021





Table of Contents

3 BACKGROUND

4 RESEARCH OBJECTIVES & METHODOLOGY

5 METHODOLOGY & SAMPLE

6 KEY INSIGHTS

9 DETAILED FINDINGS

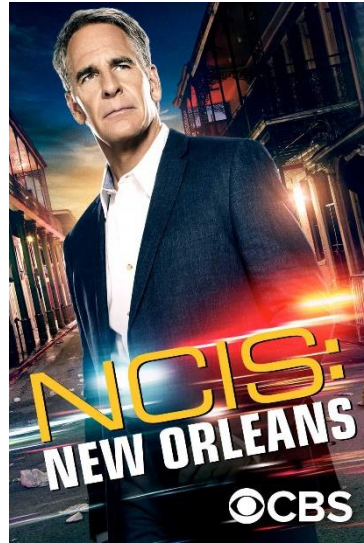
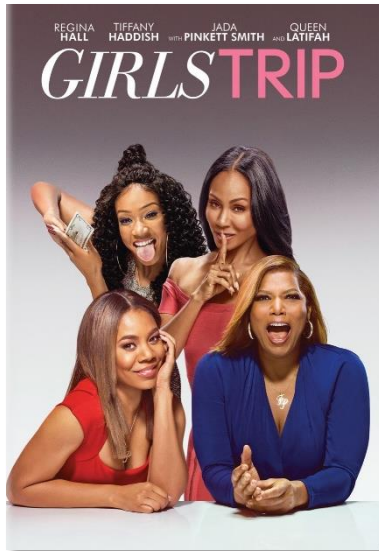
21 RESPONDENT PROFILE

23 APPENDIX: SPECIFIC LOUISIANA PRODUCTIONS SEEN & MORE DETAILED MOTIVATORS TO LA TRAVEL

BACKGROUND

Many iconic movies and TV shows (productions) are filmed and set in Louisiana each year, from *Girls Trip* to *Beasts of the Southern Wild*. The Louisiana Office of Tourism hypothesizes that the popularity of these productions has an impact on tourism and has requested research to better understand and quantify this effect.

MDRG first conducted research on this topic in 2018 and applied a broad set of assumptions to estimate the impact of film on tourism. On the following pages, MDRG details a similar methodology as an update to the previous research.





RESEARCH OBJECTIVES

Primary Objective

The primary objective of the research is to estimate the volume of tourism spending in Louisiana attributable to productions filmed or set in the state.

Specific objectives include:

- + Measure the impact of productions filmed and set in Louisiana on visitation to the state.
- + Measure the impact of productions filmed and set in Louisiana on respondents' impressions of the state.
- + Measure motivations for selecting destinations for leisure travel.
- + Measure the extent to which specific types of productions (landmarks, characters, restaurants, scenery, etc.) influence selection of a destination or visiting a place while on a trip.
- + Identify specific productions consumers have seen.



METHODOLOGY & SAMPLE

- + MDRG conducted an **Online Quantitative Survey** among 600 respondents, 250 of whom are likely to visit Louisiana in the next 12 months and 350 who are not.
- + All respondents were be screened to ensure they. . .
 - Have taken at least one leisure trip with a paid overnight stay in the last two years
 - Are age 25+
 - Are a decision maker or share decision-making for household travel planning
 - Do not work in market research
 - Live in one of the following DMAs
 - Atlanta
 - Austin
 - Birmingham
 - Dallas
 - Hattiesburg/Laurel
 - Houston
 - Jackson
 - Memphis
 - Mobile/Pensacola
 - San Antonio



KEY INSIGHTS

Key Insights



The TV and Film Industry has a significant impact on both perceptions of Louisiana and likelihood to visit.

- Those who are likely to take a leisure trip to Louisiana can accurately place significantly more productions as being set or filmed in the state than those who are not.

The gap in the number of productions placed in the state between those who are unlikely and likely to visit demonstrates the impact of the TV and Film industry on likelihood to visit.

- MDRG estimates that between 5.4% to 13.5% of likely visitors were impacted by the industry.
- This equates to a ceiling estimate of \$2.5 billion attributable to the TV and Film industry.

Productions Correctly Attributed to LA	Unlikely to Visit LA (n=350)	Likely to Visit LA (n=250)	Δ
2+	84%	82%	-1.9%
3+	69%	75%	5.4%
4+	53%	62%	9.5%
5+	38%	51%	13.5%
6+	30%	41%	10.5%
7+	25%	30%	5.4%

	Billion tourism spending per year*		Intended visits influenced by viewing Louisiana productions		Annual tourism revenue that may be attributable to Louisiana productions
HIGH-END ESTIMATE	\$18.9	×	13.5%	=	\$2.5 Billion
LOW-END ESTIMATE	\$18.9	×	5.4%	=	\$1.0 Billion

* 2019
D.K. Shifflet
Report

Key Insights



In terms of the specific depictions of the state in TV and films, the most influential to visitation are. . .

- Historical sites
- Cuisine
- Iconic landmarks

Unsurprisingly, these are among the most positively perceived aspects of the state.

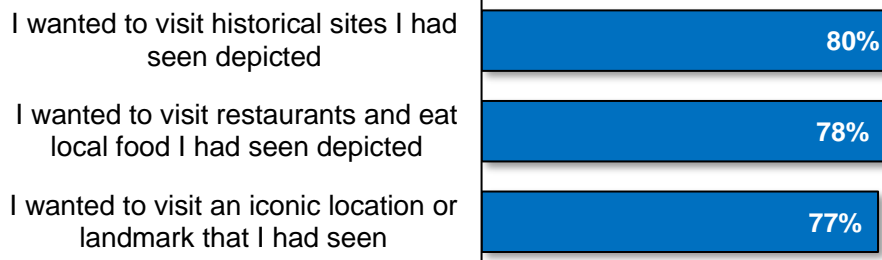


TV shows about travel and food were most likely to have impacted where consumers were likely to visit, more so than depictions in a specific film genre.

ASPECTS INFLUENCING LA VISITORS

Base: Visitors to Louisiana n=204

Units: % Indicated each was at least a minor motivator in the decision to visit



TYPES OF PRODUCTIONS IMPACTING VACATION DESTINATION

Base: Total Resp. (n=600)

Units: % Influenced by each type of production when choosing a vacation destination			
TV show about travel	33%	Reality TV show	21%
TV show about food	28%	TV drama	20%
Action movie	25%	Scary / Horror movie	13%
Romance movie	24%	TV sitcom	11%
Comedy movie	23%	None of the above	35%
Drama movie	21%		

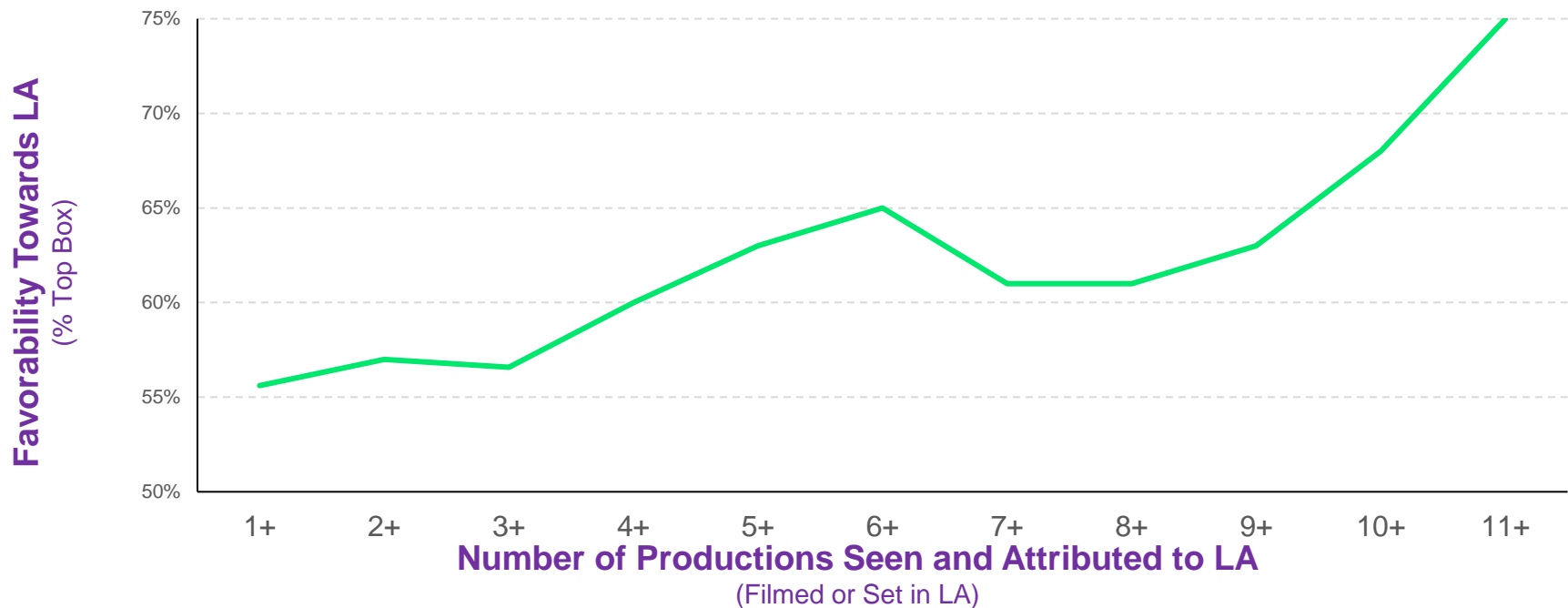


DETAILED FINDINGS

IMPACT OF THE INDUSTRY

Film Industry Impact on Favorability Towards the State

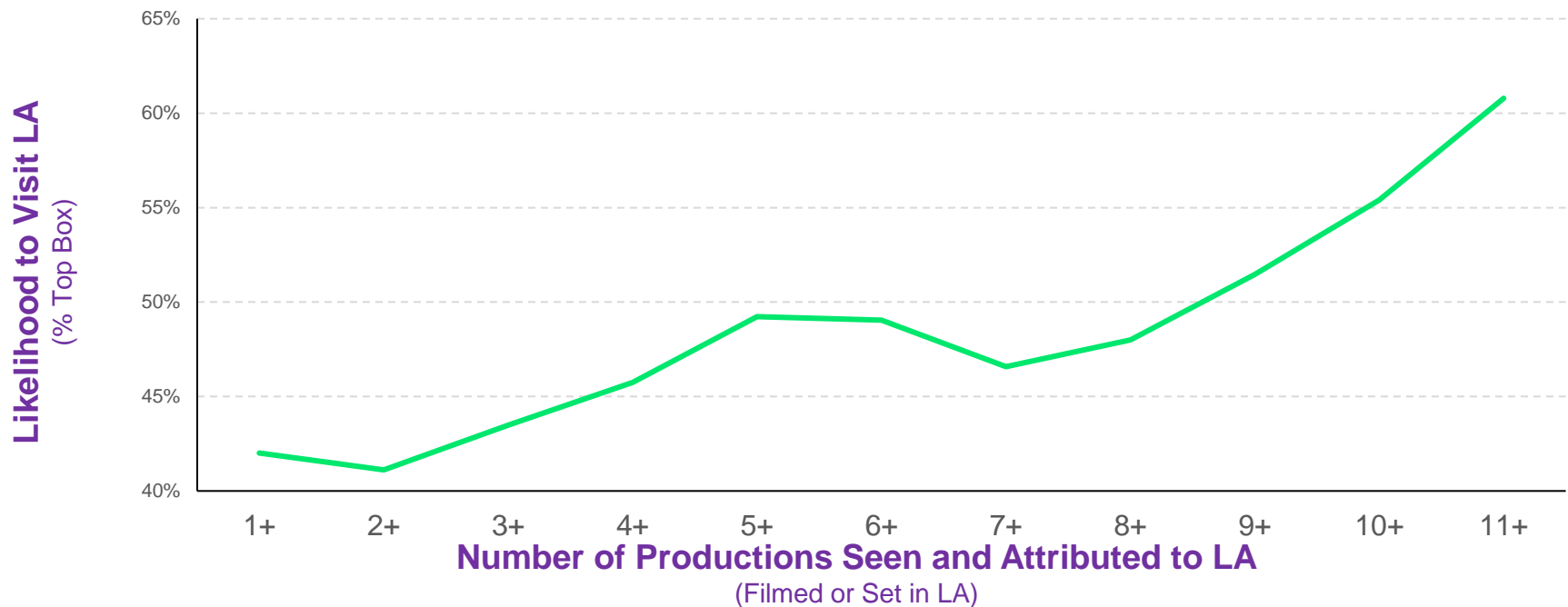
Consumers who have seen more productions set or filmed in Louisiana have a more favorable view of the state as a vacation destination, which suggests the industry positively impacts perceptions of the state.



Q1 - Which of the following best describes your overall impression of each of the following states as a vacation destination?
Q7 - Please indicate whether you have watched any of the following movies or TV shows.

Film Industry Impact on Likelihood to Visit

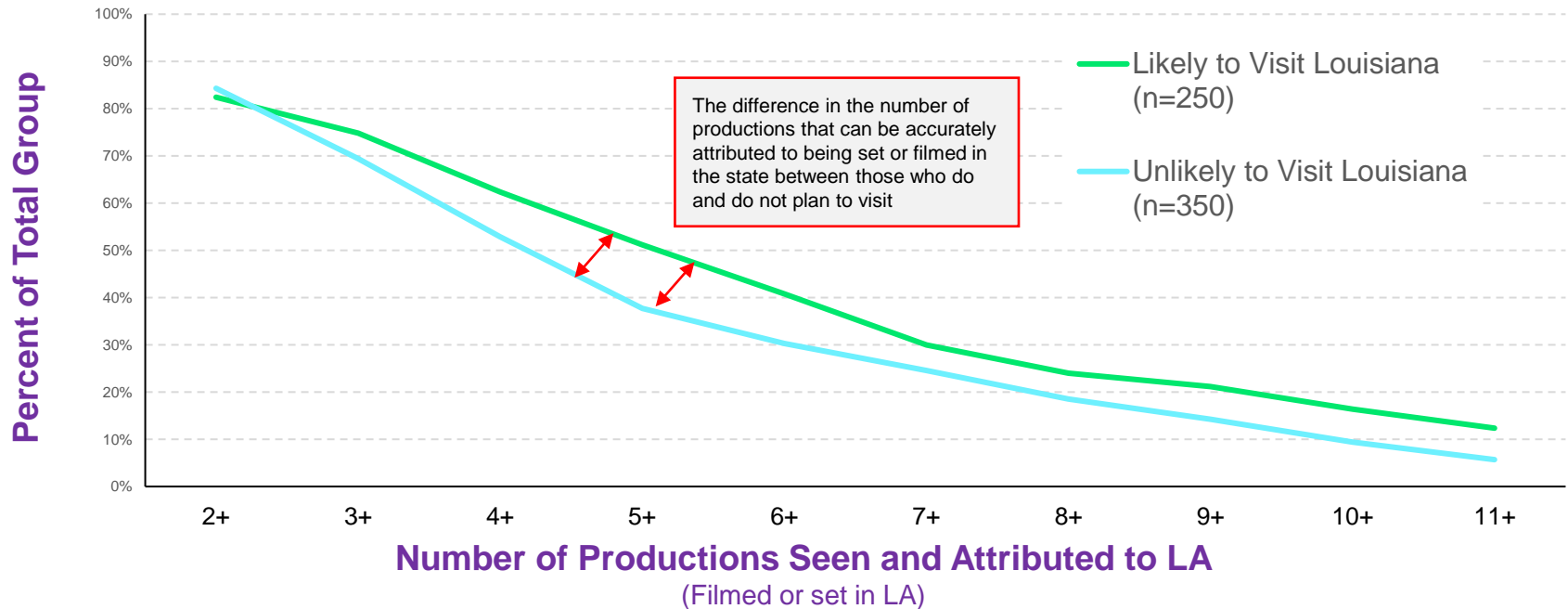
The more productions consumers have seen and can place in Louisiana, the more likely they are to plan to visit.



SC10. How likely are you to visit Louisiana in the next year?
Q7 - Please indicate whether you have watched any of the following movies or TV shows.

Impact of the Film Industry on **Likelihood to Visit**

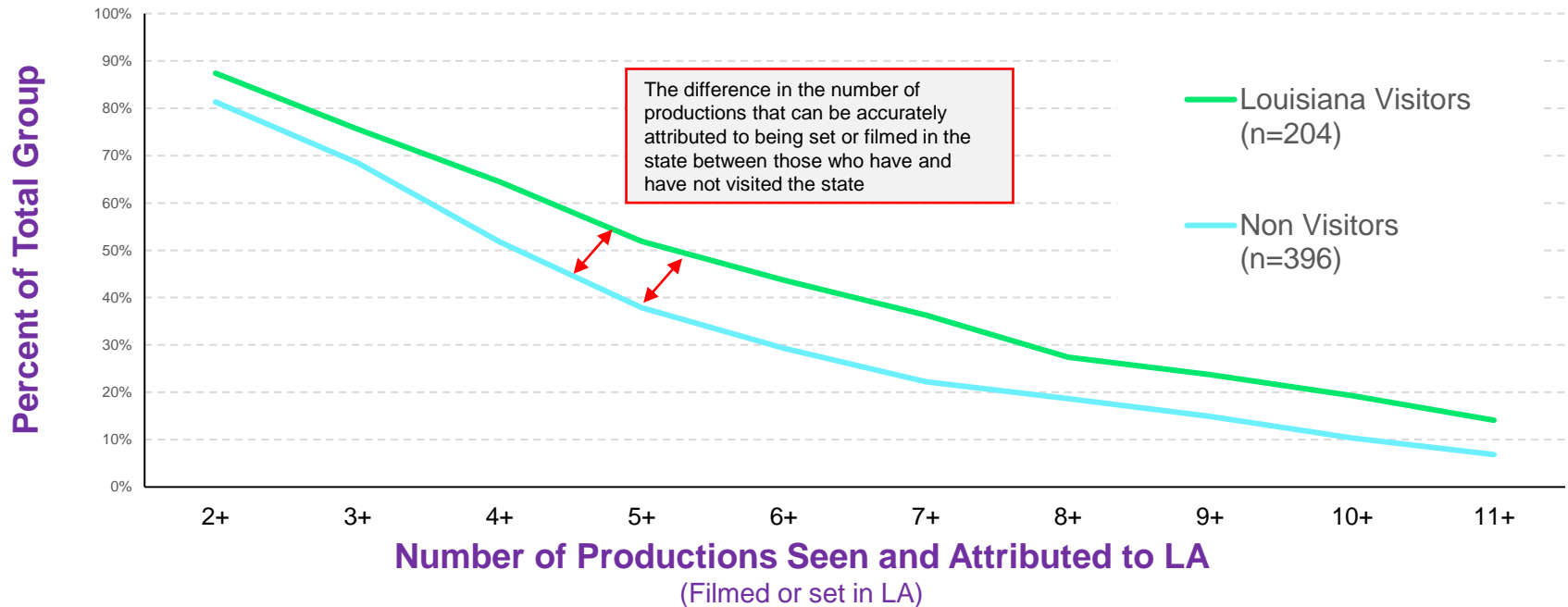
Compared to those who are unlikely to visit, those who are likely to visit can accurately place more productions as being filmed or set in the state, demonstrating the industry's impact.



SC10. How likely are you to visit Louisiana in the next year?
Q8 - Do you recall in which state the storyline of each production was set?
Q9 - Do you recall in which state each production was filmed?

Impact of the Film Industry on Past Visitation

Further validating the industry's impact on visitation, those who have visited in the past can accurately attribute more productions to the state than those who have not.



Sc8 - Please indicate whether you have visited any of the following states in the past TWO YEARS.
Q8 - Do you recall in which state the storyline of each production was set?
Q9 - Do you recall in which state each production was filmed?

Quantifying the Impact of the Film and TV Industry on Visitation

Productions Correctly Attributed to LA	Unlikely to Visit LA (n=350)	Likely to Visit LA (n=250)	Δ
2+	84%	82%	-2%
3+	69%	75%	5%
4+	53%	62%	10%
5+	38%	51%	13%
6+	30%	41%	11%
7+	25%	30%	5%
8+	19%	24%	5%
9+	14%	21%	7%
10+	9%	16%	7%
11+	6%	12%	7%

Differences between those who are likely and unlikely to visit may not sum due to rounding.

To calculate the percentage of tourism dollars attributable to productions set or filmed in the state. . .

- MDRG compared those who are likely and unlikely to visit in terms of the number of productions they've seen and can accurately place in Louisiana.
- When comparing the two groups, the largest gap exists at five productions. Using this threshold, MDRG estimates a ceiling of approximately 13.5% of likely visitors are influenced by the movie industry with a lower-end estimate of 5.4% being influenced by the industry.

5.4% - 13.5%
of planned visits influenced by the
film + TV Industry

Economic Impact

MDRG estimates that a ceiling of \$2.5 billion of the \$18.9 billion in total tourism spending (13.5%) is influenced by the industry and its depictions of the state.

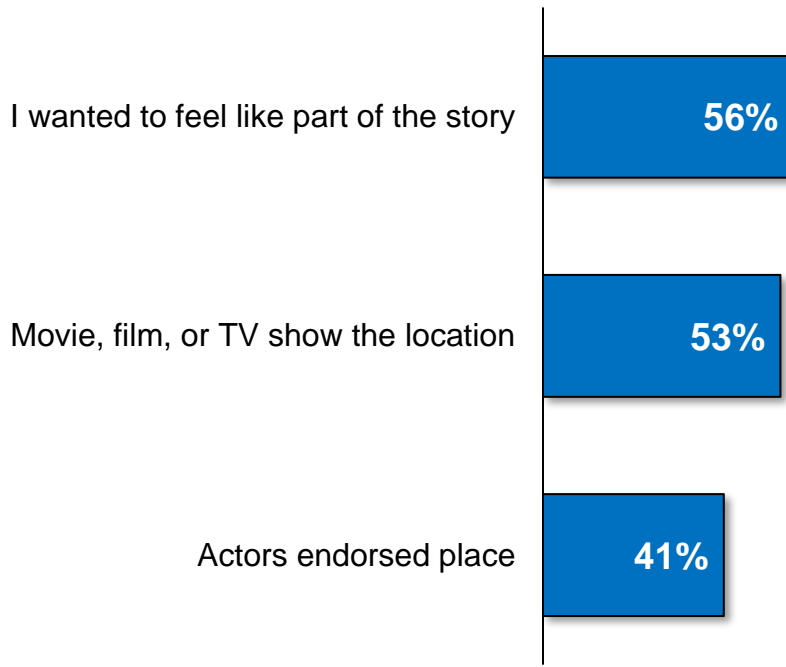
	BILLION TOURISM SPENDING PER YEAR*		INTENDED VISITS INFLUENCED BY LOUISIANA PRODUCTIONS		ANNUAL TOURISM REVENUE THAT MAY BE ATTRIBUTABLE TO LOUISIANA PRODUCTIONS
HIGH-END ESTIMATE	\$18.9	×	13.5%	=	\$2.5 Billion
LOW-END ESTIMATE	\$18.9	×	5.4%	=	\$1.0 Billion

* 2019 D.K. Shifflet Report

The Role of TV and Film in the Decision to Visit Louisiana

Base: Visitors to Louisiana n=204

Units: % Indicated each was at least a minor motivator in the decision to visit



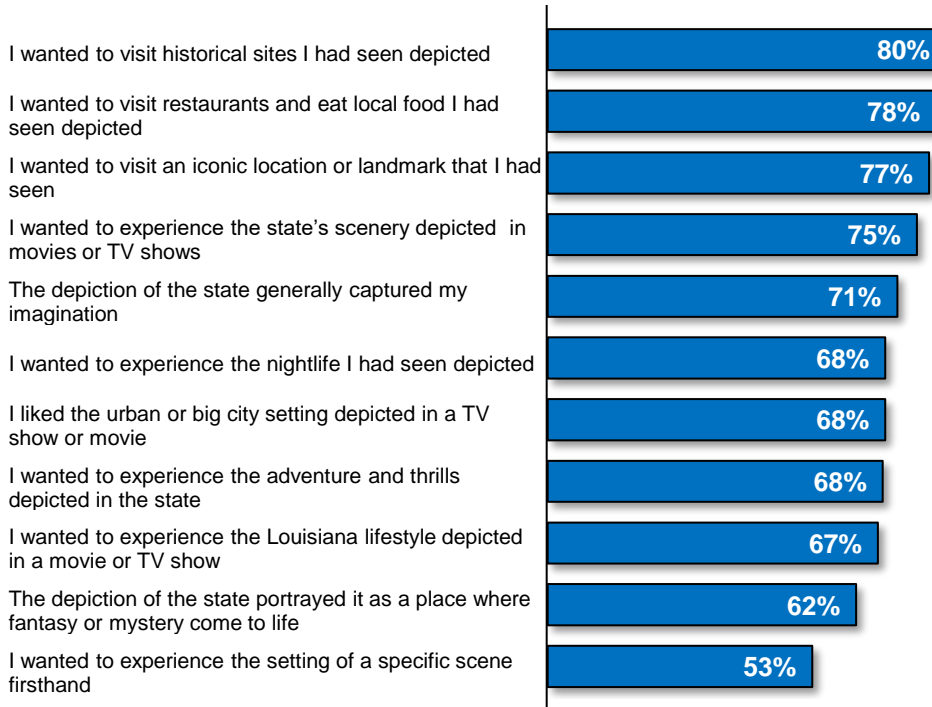
Approximately half of recent visitors to the state indicated that a movie, film, or TV show of the state was a motivator for choosing to visit.

Q10a - Thinking about your most recent trip to Louisiana, to what degree did each of the following motivate your decision to visit?

Impact of Specific Film Depictions on Visitation

Base: Visitors to Louisiana n=204

Units: % Indicated each was at least a minor motivator in the decision to visit



Each aspect depicted in movies or TV was cited by a majority as a motivator for visiting. Depictions of historical sites, iconic landmarks, and cuisine were most likely to have played a role.

Q10b - Below are some aspects of Louisiana depicted in movies or TV shows that may have impacted your decision to visit the state. For each one, please indicate the role it played in motivating you to visit.

Perceptions of Louisiana

Agreement that Louisiana has: Units: (% 4 or 5 on 5-point scale)	Total Resp. (n=600)
Restaurants that offer superb, local cuisine	81%
A variety of historical and cultural attractions	77%
Great live music & entertainment	77%
Exciting nightlife venues	76%
Easy to access via interstate or air travel	76%
Beautiful and scenic places	73%
Unique experiences that you cannot get anywhere else	72%
Interesting fairs and festivals	70%
Good value - that is accommodations and activities priced right for me	65%
A variety of outdoor activities such as hunting, fishing, camping, golfing, biking, and hiking	64%
Unique shopping opportunities	64%
Attractions the whole family, including children, can enjoy	63%
Safe and secure places	56%

Perceptions are most favorable of Louisiana's restaurants, cultural attractions, music and nightlife. Perceptions of the state are less favorable in terms of safety and family-friendly attractions.

Q2 - Even if you have not visited before, please rate your agreement that Louisiana has...

Perceptions of Louisiana

Agreement that Louisiana has: Units: (% 4 or 5 on 5-point scale)	Unlikely to Visit LA (n=350)	Likely to Visit LA (n=250)	Δ
Good value - that is accommodations and activities priced right for me	50%	85%	35%
Safe and secure places	42%	76%	34%
A variety of outdoor activities such as hunting, fishing, camping, golfing, biking, and hiking	53%	80%	27%
Unique shopping opportunities	53%	80%	27%
Attractions the whole family, including children, can enjoy	52%	78%	26%
Beautiful and scenic places	63%	88%	25%
Interesting fairs and festivals	61%	84%	23%
Easy to access via interstate or air travel	66%	90%	23%
A variety of historical and cultural attractions	68%	90%	22%
Unique experiences that you cannot get anywhere else	63%	84%	21%
Great live music & entertainment	69%	89%	20%
Restaurants that offer superb, local cuisine	74%	92%	18%
Exciting nightlife venues	70%	85%	16%

Differences between those who are likely and unlikely to visit may not sum due to rounding.

Q2 - Even if you have not visited before, please rate your agreement that Louisiana has...

When comparing those who are unlikely to visit to those who are, the greatest gap is in perceptions of value and safety.

Impact of Types of Productions on Destination Choice

TV shows about travel and food are the most likely to impact consumers' choice of a vacation destination.

TYPES OF PRODUCTIONS IMPACTING DESTINATION

Units: % Influenced by each type of production when choosing a vacation destination	Total Resp. (n=600)
TV show about travel	33%
TV show about food	28%
Action movie	25%
Romance movie	24%
Comedy movie	23%
Drama movie	21%
Reality TV show	21%
TV drama	20%
Scary / Horror movie	13%
TV sitcom	11%
None of the above	35%

Q6. People are often influenced by a variety of factors when choosing a destination to visit, including movies or TV shows. Have any of the following types of productions impacted a past decision of yours as to where to visit? Please select all that apply.



RESPONDENT PROFILE

Respondent Profile

Units: %	Total (n=600)	Unlikely to Visit Louisiana (n=350)	Likely to Visit Louisiana (n=250)	Visited Louisiana (n=204)	Did Not Visit Louisiana (n=396)
AGE					
Millennial (25-39)	32%	30%	34%	30%	33%
Gen X (40- 54)	33%	30%	36%	33%	33%
Boomer (55+)	36%	40%	29%	37%	35%
GENDER					
Male	49%	45%	55%	49%	49%
Female	51%	55%	45%	51%	51%
RACE/ETHNICITY					
Caucasian / White	85%	86%	84%	82%	86%
African American / Black	9%	8%	10%	11%	7%
Hispanic	5%	5%	5%	6%	5%
Asian	3%	3%	4%	3%	4%
Native American or Pacific Islander	2%	1%	2%	3%	1%
Other	1%	<1%	1%	<1%	1%
Prefer not to answer	1%	1%	--	--	1%
EDUCATION					
Less than high school	1%	1%	1%	1%	1%
High school graduate	8%	10%	4%	8%	8%
Trade or vocational school	3%	4%	1%	<1%	4%
Some college	19%	20%	18%	19%	19%
College graduate	38%	35%	41%	44%	34%
Post graduate work or degree	32%	29%	35%	28%	33%
Prefer not to answer	<1%	<1%	--	--	<1%
INCOME					
Less than \$30,000	8%	10%	5%	6%	9%
\$30,000 - \$39,999	5%	4%	6%	7%	4%
\$40,000 - \$49,999	7%	7%	7%	11%	5%
\$50,000 - \$59,999	7%	8%	6%	7%	7%
\$60,000 - \$69,999	7%	7%	5%	5%	7%
\$70,000 - \$79,999	9%	10%	8%	7%	10%
\$80,000 - \$99,000	14%	13%	15%	16%	13%
\$100,000 or more	39%	34%	46%	38%	39%
Prefer not to answer	4%	5%	2%	3%	5%



APPENDIX

**SPECIFIC LOUISIANA PRODUCTIONS SEEN & MORE
DETAILED MOTIVATORS TO LA TRAVEL**

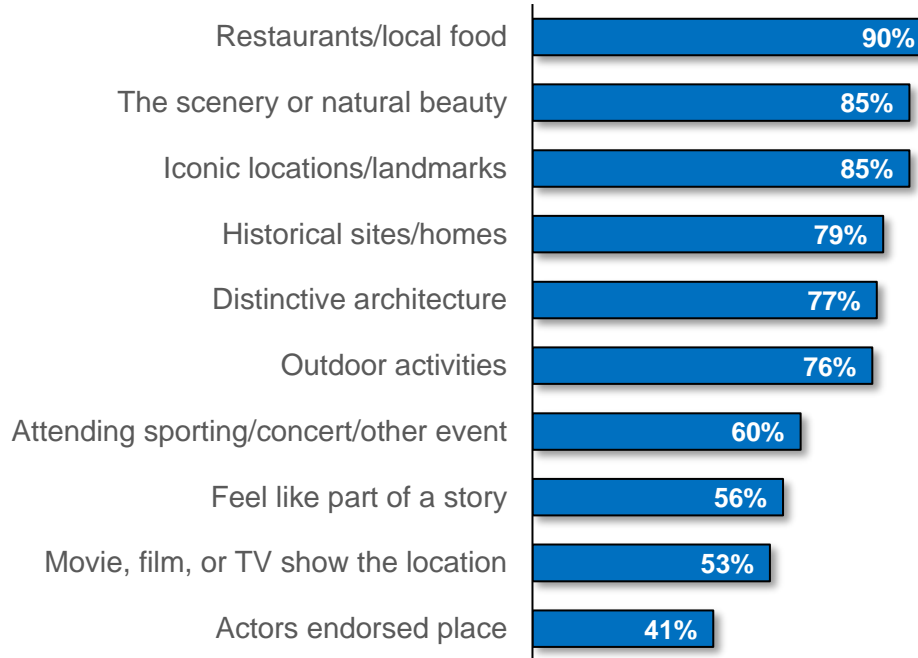
Specific Louisiana Productions Seen

Units: % Watched	Total (n=600)	Unlikely to Visit Louisiana (n=350)	Likely to Visit Louisiana (n=250)
Steel Magnolias	63%	66%	59%
Bonnie & Clyde	58%	56%	60%
NCIS: New Orleans	56%	55%	56%
The Pelican Brief	53%	52%	54%
Duck Dynasty	51%	49%	53%
The Curious Case of Benjamin Button	49%	46%	54%
Pitch Perfect	46%	44%	50%
Interview with the Vampire	46%	41%	52%
Double Jeopardy	45%	43%	48%
Easy Rider	44%	38%	52%
Now You See Me	44%	40%	49%
The Big Easy	42%	38%	48%
Dead Man Walking	42%	35%	51%
A Streetcar Named Desire	39%	33%	46%
Swamp People	36%	29%	46%
All The King's Men	35%	30%	42%
Green Book	34%	30%	39%
Girls' Trip	29%	25%	34%
Skeleton Key	27%	27%	27%
Déjà Vu	26%	23%	31%
Christmas in Louisiana	23%	18%	31%

Q7 - Please indicate whether you have watched any of the following movies or TV shows.

Motivations for Visiting Louisiana

Base: Visitors to Louisiana n=204



Louisiana's cuisine, natural beauty, architecture, historical homes, and other iconic landmarks are the most common motivators.

The attributes specifically related to the TV and film industry - while mentioned by sizable percentages - were less likely to be mentioned, suggesting their effect on tourism may be more subtle than the state's traditional offerings.

Q10a - Thinking about your most recent trip to Louisiana, to what degree did each of the following motivate your decision to visit?

THANK YOU!



MDRGINC.COM | 935 GRAVIER ST. SUITE 2160 | NEW ORLEANS, LA 70112 | (504) 821-1910