



Mississippi Ad Effectiveness Study

Presentation of Results

July 14, 2015



Online survey conducted on behalf of the Mississippi Development Authority by DPA.

- Fielded between April 22 and May 5, 2015.
- 10 minutes to complete.
- Representative of the geographic area under study in terms of age and sex, and balanced to reflect the proper proportion of households in and around Mississippi.

2,026 Respondents were drawn from states and DMAs within a 500-mile radius of Mississippi.

- Target DMAs included Baton Rouge, Birmingham, Memphis, Mobile-Pensacola, and New Orleans (approximately 250 interviews were conducted among residents of each of these DMAs).
- Other regions sampled included Mississippi residents (253 interviews among those outside the DMAs above), the remainder of the 250 mile radius around Mississippi (that is, not in a designated DMA, 263 interviews), and the 251-500 mile radius around Mississippi (251 interviews).

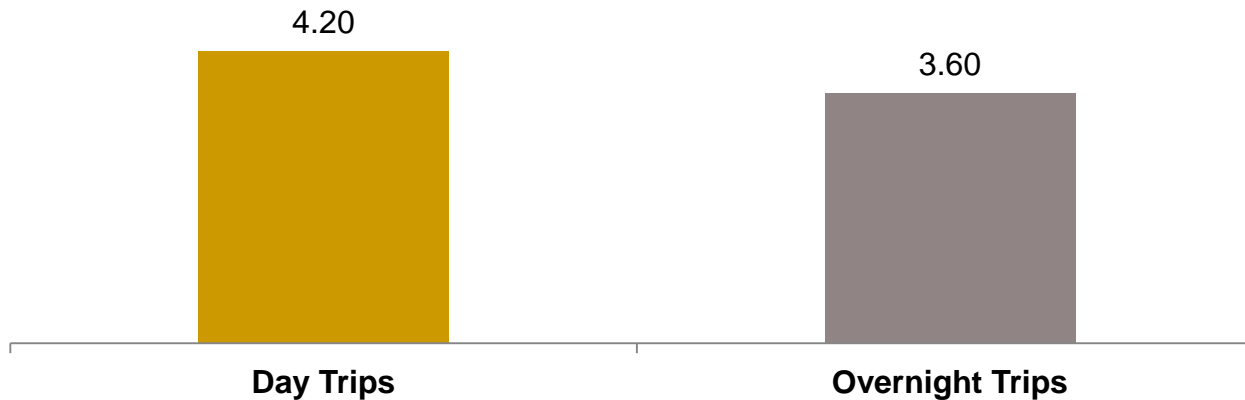
In order to qualify for the survey, respondents were required to:

- Reside in a target region as described above;
- Be over the age of 18;
- Participate in travel decisions in their household; and
- Not work in an industry that could create a conflict of interest.

Profile of Mississippi Leisure Travelers

On average, residents of the target market take about 4 overnight and 4 day trips per year.

Average Number of Leisure Trips Since April 2014
(n=2,026)

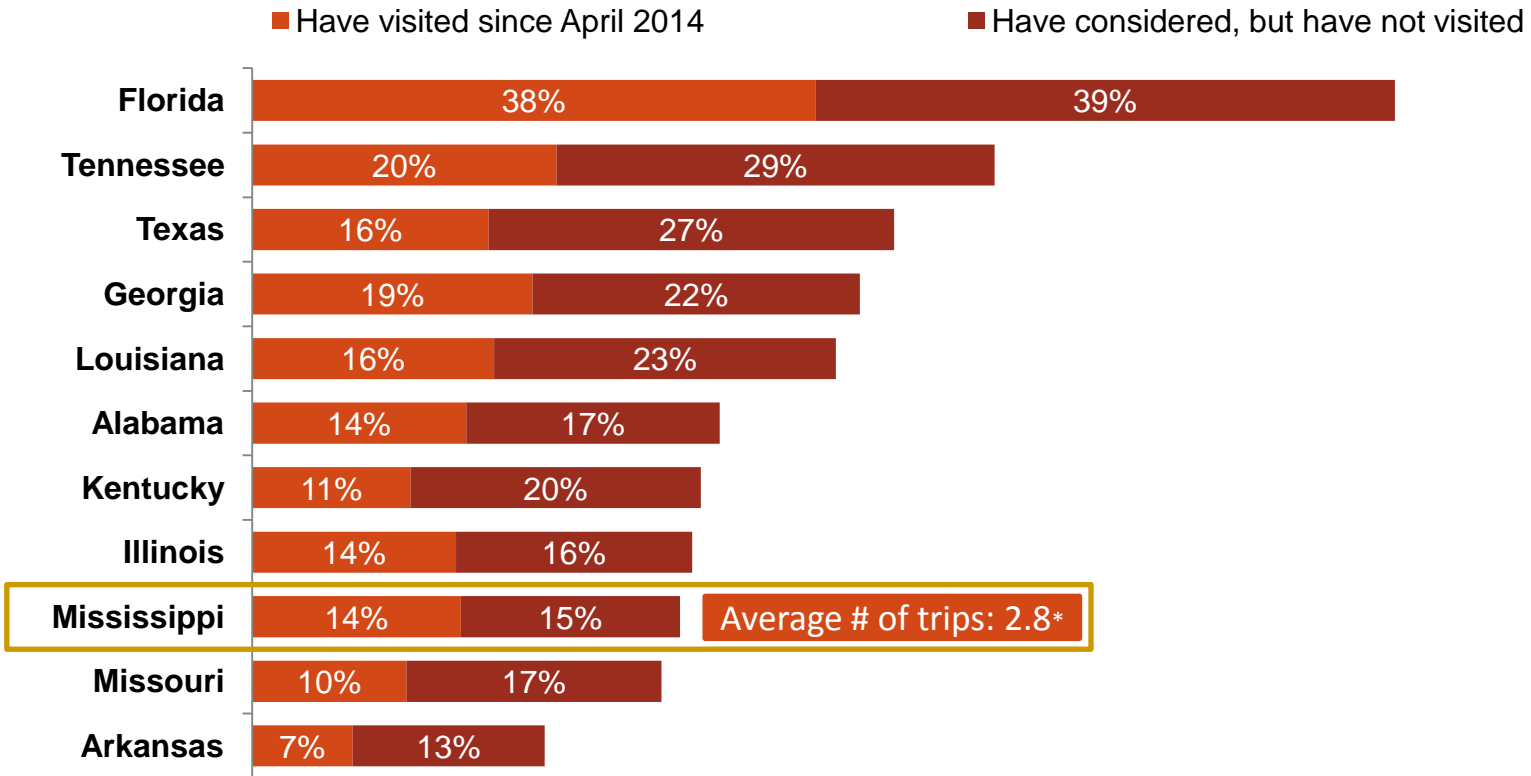


	Average # of Day Trips	Average # of Overnight Trips
MS Travelers [a]	6.1 b	5.9 b
Non-travelers [b]	3.9	3.3

Q1. Over the past twelve months, that is, since April of 2014, how many vacations, weekend getaways, leisure or personal trips, if any, have you taken to destinations that included at least one overnight stay?
 Q2. Since April of 2014, how many times did you travel at least 50 miles away from your home for a vacation, weekend getaway, leisure or personal trip, on which you did not stay overnight?
 Q6. How many trips for leisure (vacations, weekend getaway, other personal reasons) did you [take to Mississippi / take within Mississippi that were 50 miles or more away from your home] in the past 12 months (since April of 2014)? ab indicates significance at the 95% confidence level.

Three out of ten target market residents have at least considered traveling to Mississippi in the past year (30%).

Destination Consideration and Travel
(n=2,026)



Q4. Over the past twelve months, that is, since April of 2014, which of the following U.S. states, if any, have you been to or considered going to for a leisure trip or vacation, whether or not you actually took a vacation there?

Q6. How many trips for leisure did you take [to Mississippi / within Mississippi that were 50+ miles away from home] since April 2014?

* Among Mississippi leisure travelers / ** 50+ miles away from their home if a Mississippi resident.

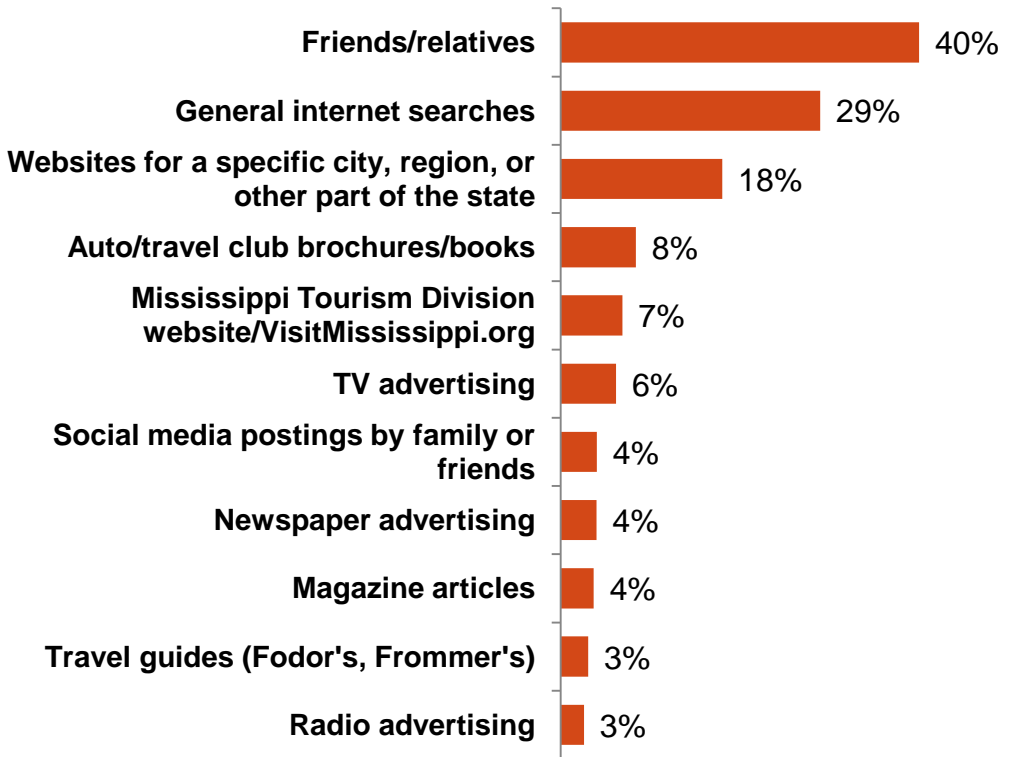
ab indicates significance at the 95% confidence level.

Friends and relatives are, by far, the most common sources of information about traveling to Mississippi, followed by online searches.



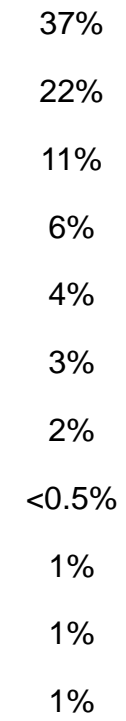
Most Common Information Sources Used in Trip Planning

Among Mississippi Leisure Travelers (n=617)



Most Helpful Information Source

Among Mississippi Leisure Travelers Who Used a Trip Planning Source (n=451)



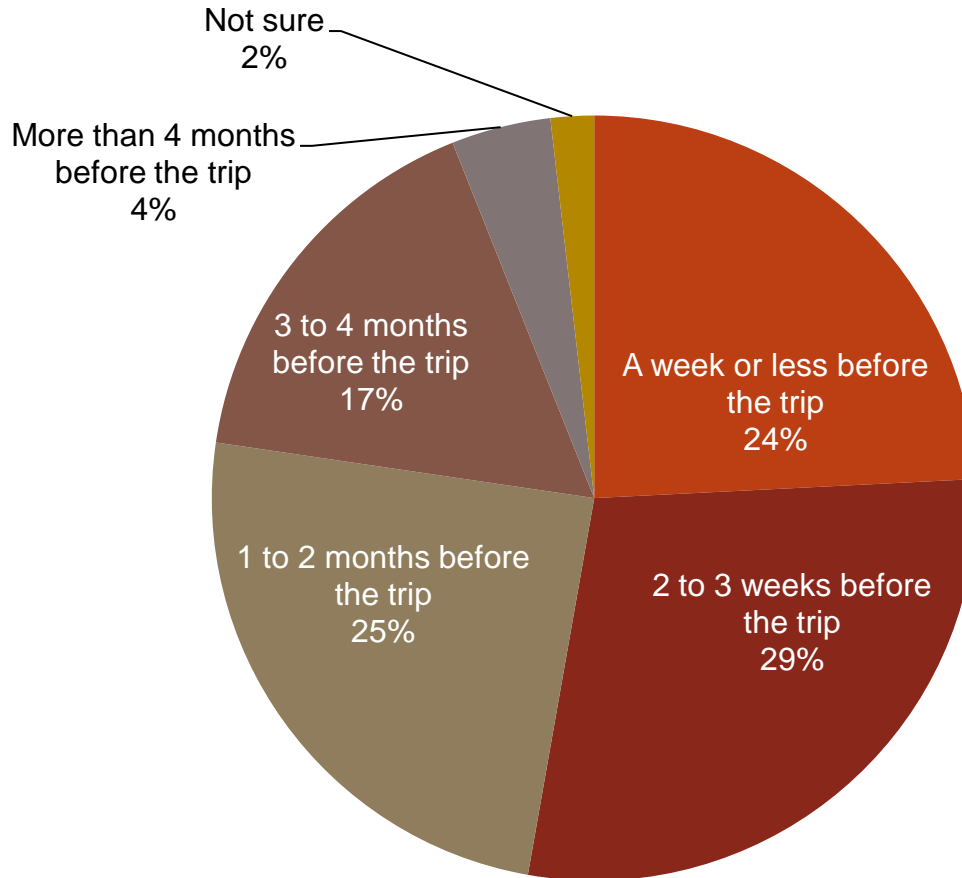
Additional trip planning resources used by 2% or less of visitors include: magazine advertising, radio shows, newspaper articles, travel club materials, local chambers of commerce, TV shows, social media ads, and MississippiHomecoming.com.



Q7. On your LAST leisure trip to Mississippi / On your LAST leisure trip within Mississippi that was 50 miles or more away from your home, what sources did you use for information about the destination?
 Q8. Which ONE information source was the MOST helpful for your last trip [to / 50 miles or more away from your home within Mississippi]? (Please select only one source.)

Travelers typically plan their Mississippi vacations shortly before leaving home.

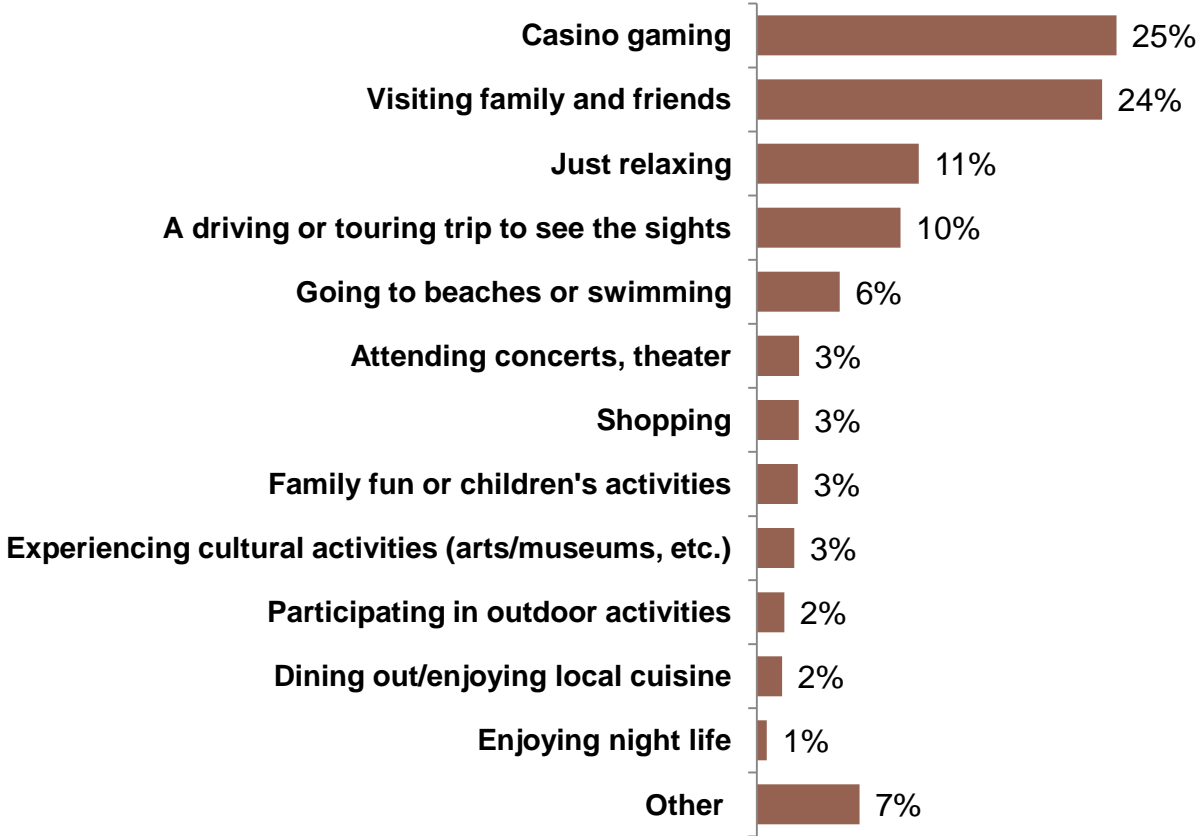
Mississippi Trip Planning
Among Mississippi Leisure Travelers
(n=591)



Gaming and visiting friends and relatives are the primary drivers of travel to and within the state.



Primary Purpose of Mississippi Trip
Among Mississippi Leisure Travelers
(n=591)



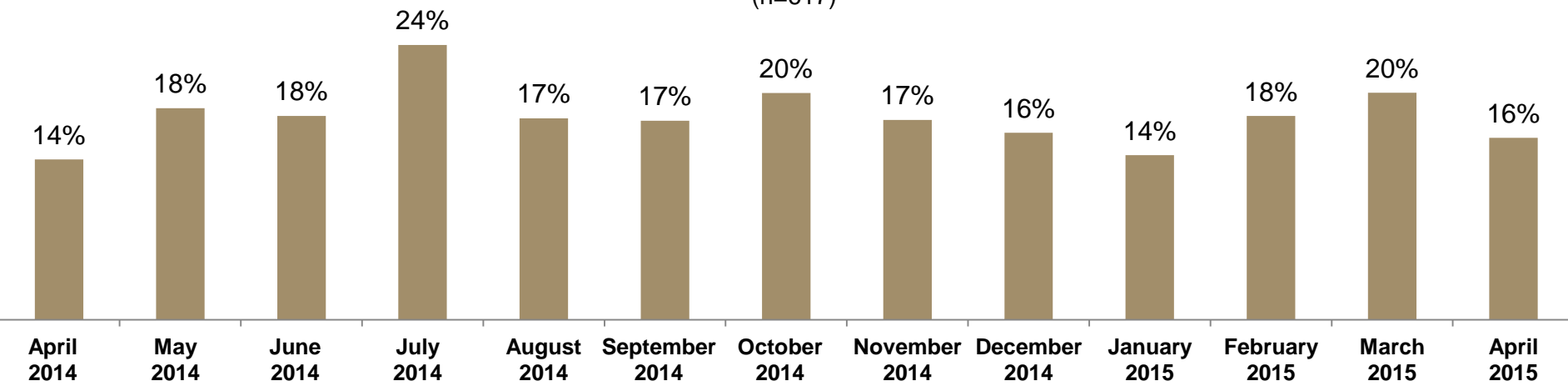
MS Residents* [a]	Non-residents [b]
10%	27% a
27%	24%
11%	11%
4%	11% a
4%	6%
5%	3%
9% b	2%
9% b	2%
4%	3%
4%	2%
-	1%
11%	7%

Q12. What was the PRIMARY purpose of your most recent leisure trip [to Mississippi / within Mississippi that was 50 miles or more away from your home]?
* 50+ miles away from their home if a Mississippi resident.
ab indicates significance at the 95% confidence level.

The typical travel party consists of more than two people. Mississippi vacations are spread out relatively evenly across months and seasons.

The average leisure travel party visiting Mississippi includes 2.6 visitors.

Month Visited Mississippi
Among Mississippi Leisure Travelers
(n=617)

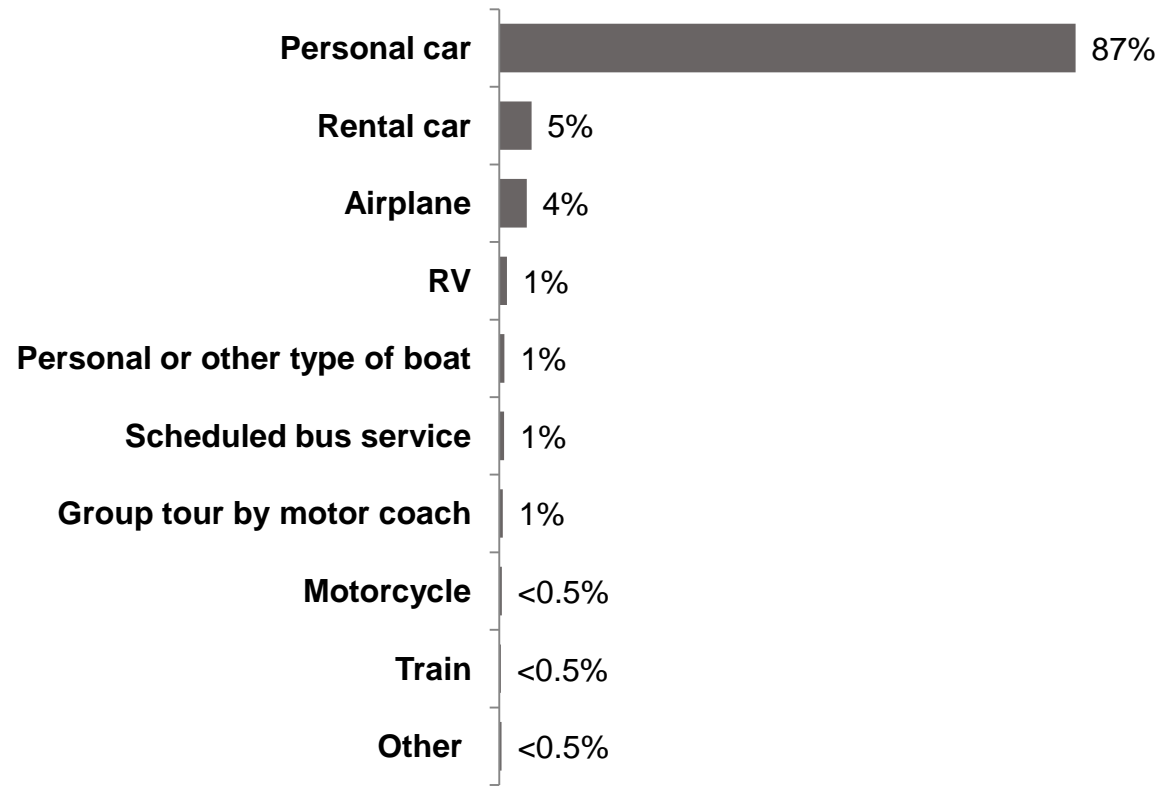


Q9. In which of the following month(s) did you [visit / travel 50 miles or more away from your home within] Mississippi on a leisure trip? (Please select all that apply. If a trip carried over into two months, please mark ONLY the month in which your trip BEGAN.)
 Q16. On your most recent leisure trip [to / 50 miles or more away from your home in] Mississippi, how many people, including yourself, were in your immediate travel party? (Please include only your immediate group – not the entire motor coach tour or all relatives at a family reunion.)

Nine out of ten travelers use their own cars to get to their Mississippi destination.



Transportation Used on Most Recent Mississippi Trip
Among Mississippi Leisure Travelers
(n=591)

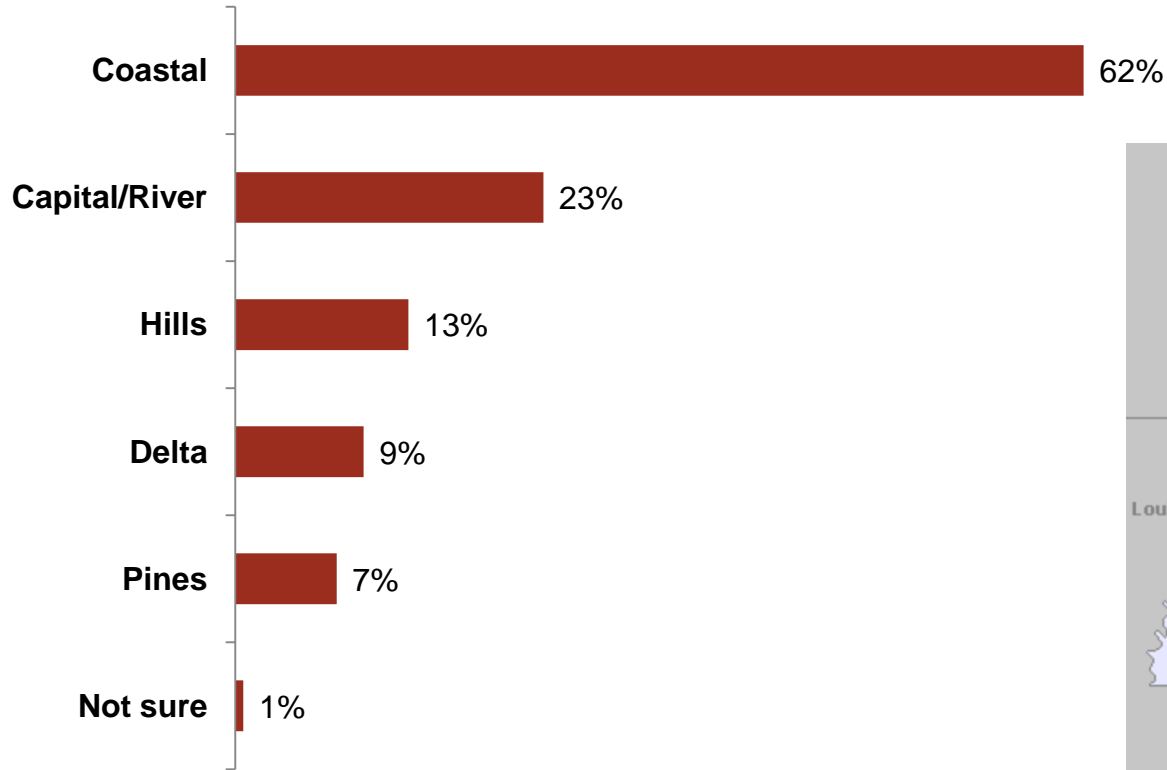


Most Mississippi leisure travelers go to the coast.



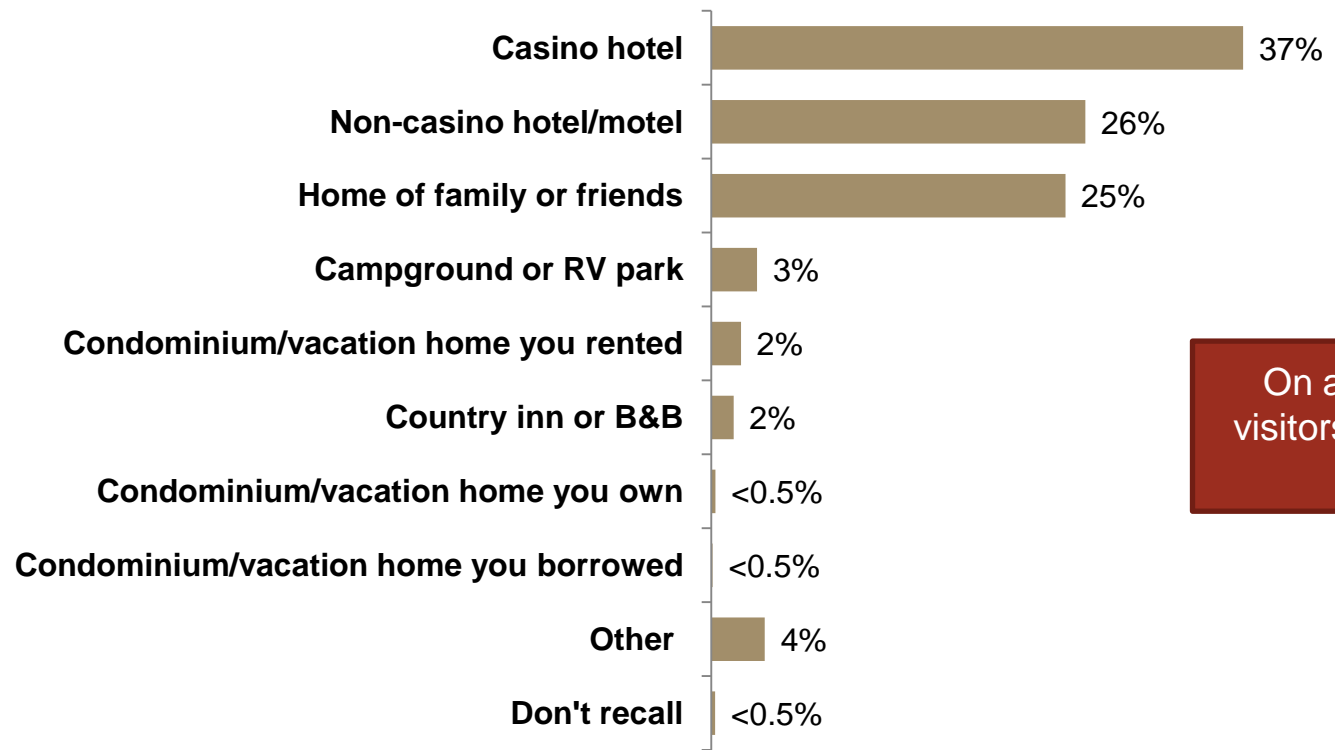
Regions Visited on Most Recent Mississippi Trip

Among Mississippi Leisure Travelers
(n=591)



The typical overnight Mississippi leisure trip lasts two nights. Casino hotels are the most common accommodations on overnight stays.

Accommodations Used on Most Recent Mississippi Trip
 Among Those Who Stayed Overnight in Mississippi
 (n=445)

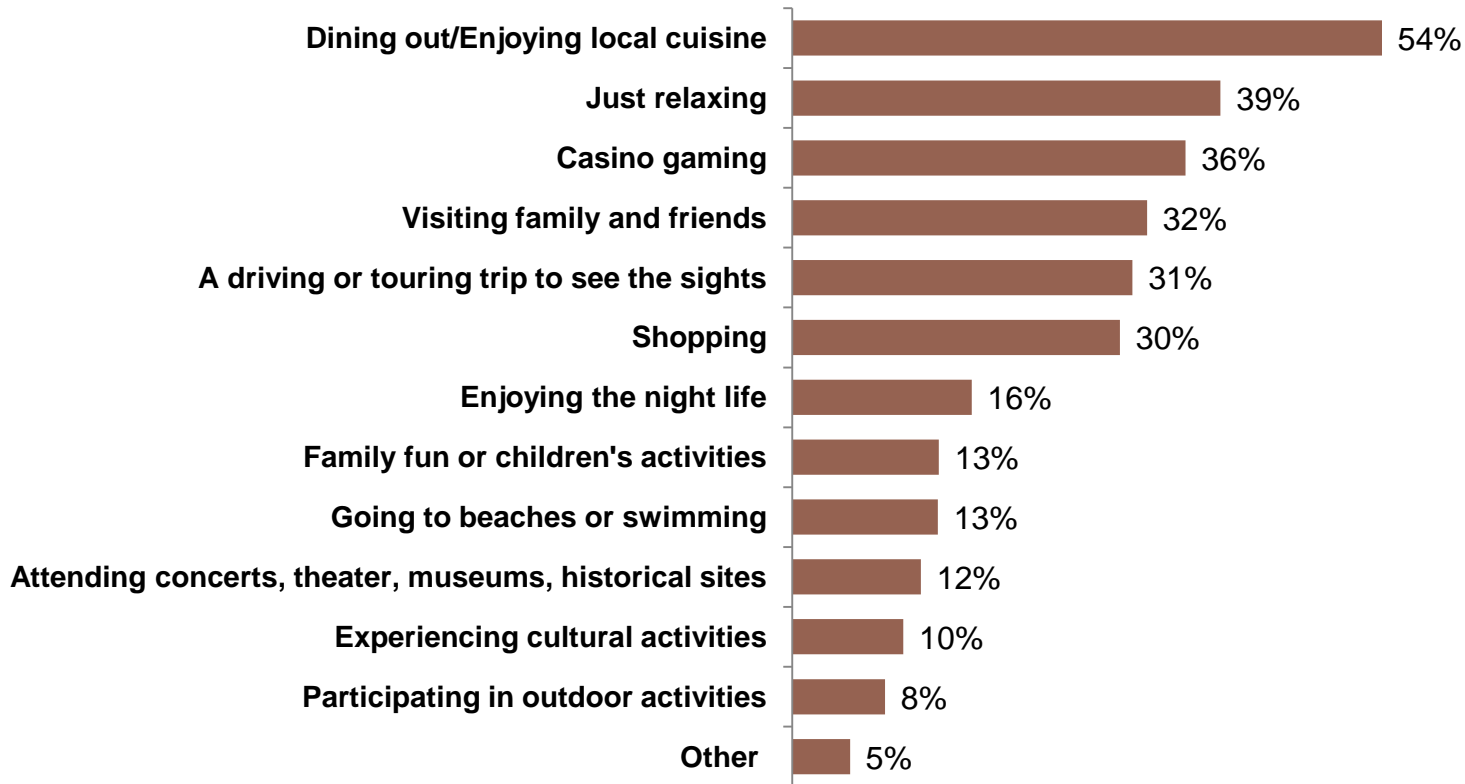


On average, overnight visitors spent 2.2 nights in Mississippi.

Leisure travelers take advantage of many activities in Mississippi.



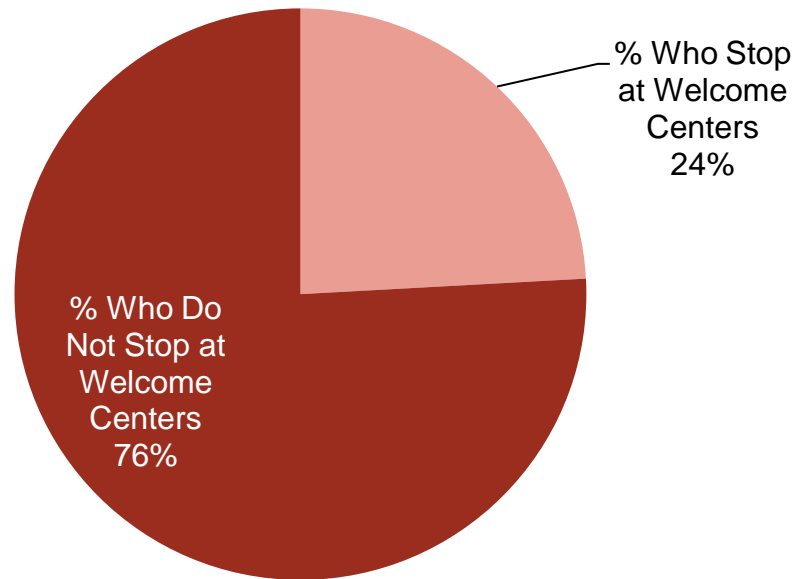
Activities on Mississippi Trips
Among Mississippi Leisure Travelers
(n=591)



One-quarter of travelers stop at a Welcome Center.

Those who stop at a Welcome Center are more likely than those who do not to say they would recommend a leisure visit to Mississippi (95% vs. 83%).

Mississippi Welcome Center Utilization
Among Mississippi Leisure Travelers (n=591)



MS Residents* [a]	Non-Residents [b]
10%	26%

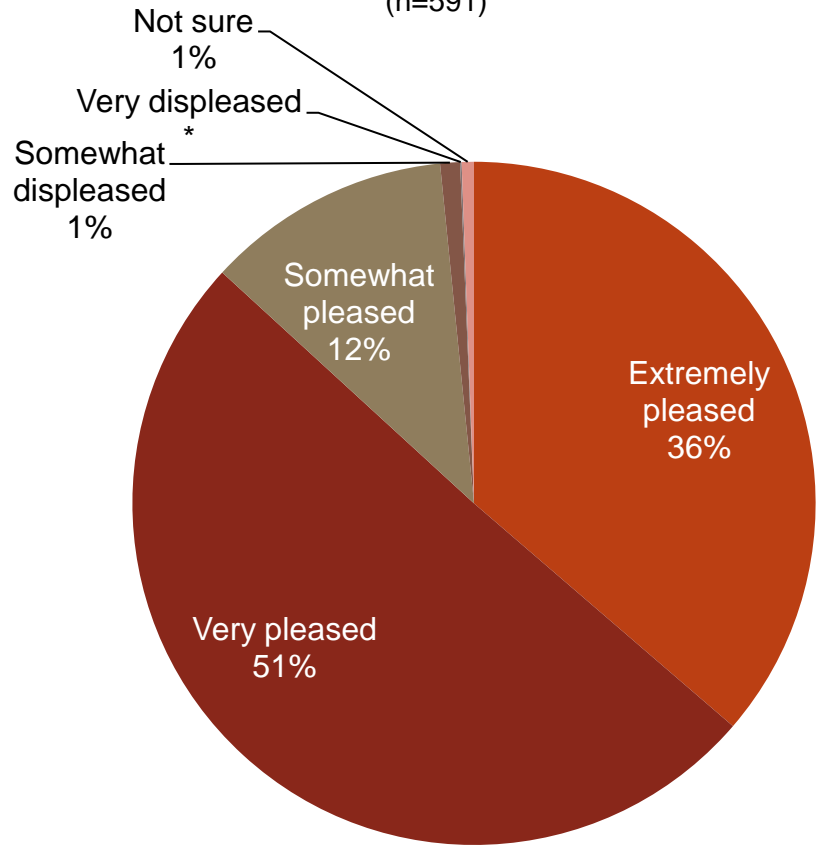
The typical travel party spends about \$550 on Mississippi leisure trips; the largest share of spending is on gaming.

**Average Spending in Mississippi
Among Mississippi Leisure Travelers**

	(n=591)	% of Spending
Gaming (ONLY gaming expenses)	\$179	33%
Food and Beverages (restaurant meals, snacks, groceries, beer/wine/ liquor)	\$110	20%
Lodging & Accommodations (<i>Before taxes</i>)	\$94	17%
Shopping (souvenirs, clothing, household items)	\$70	13%
Transportation (Gasoline; parking; train, bus, or taxi fares) <u>purchased in Mississippi</u>	\$57	10%
Recreation or Entertainment (activities; tours, historical sites, museums; performances; sporting events)	\$31	6%
Car Rental <u>rented</u> in Mississippi	\$2	0%
All other expenses	\$6	1%
Total	\$547	

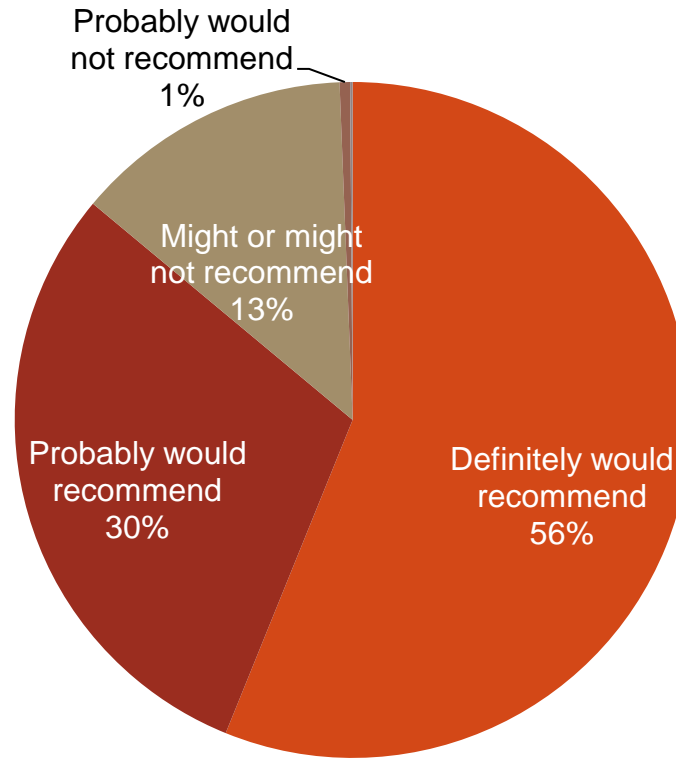
Almost all Mississippi travelers are pleased with their trips to the state.

Satisfaction With Leisure Trips to Mississippi
Among Mississippi Leisure Travelers
(n=591)



Nearly all Mississippi travelers would be willing to recommend the state as a leisure travel destination.

Likelihood to Recommend Mississippi Among Mississippi Leisure Travelers (n=591)

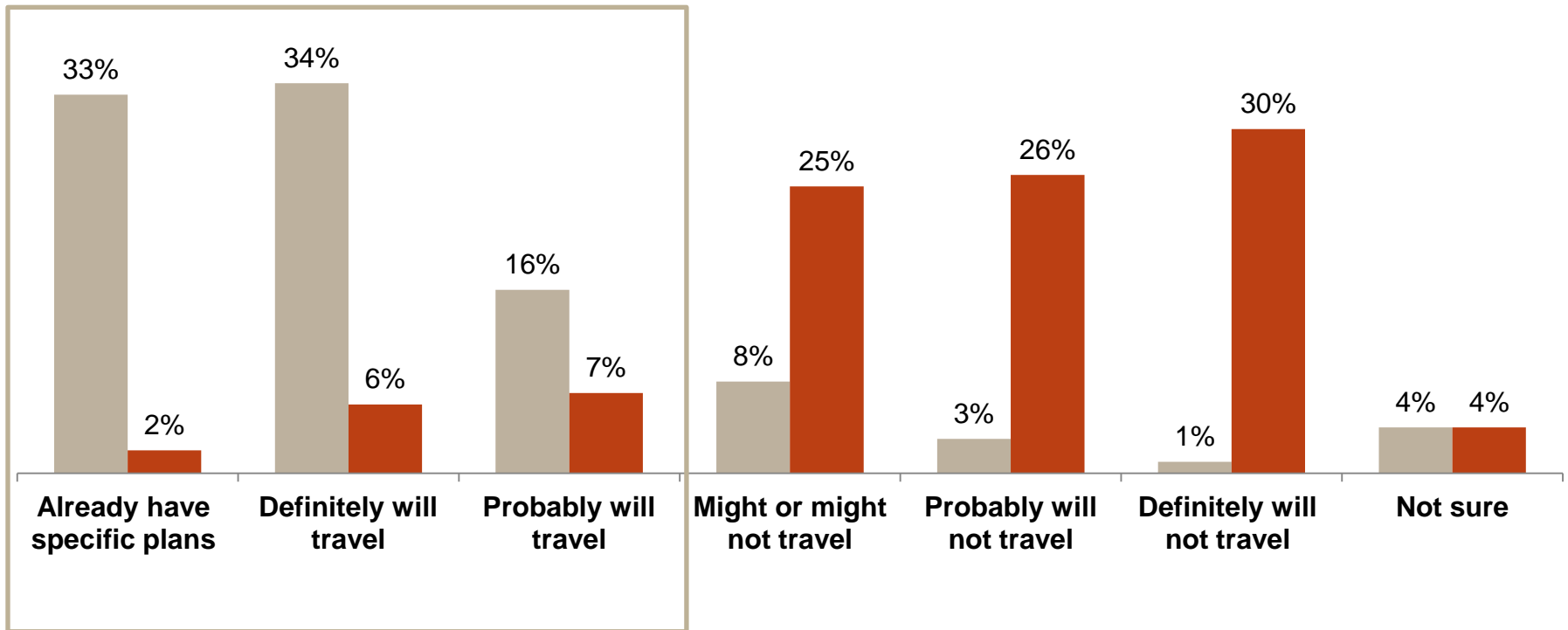


Those who have recently traveled in Mississippi are much more likely than those who have not to be receptive to additional leisure trips in the state.

Plans to Return to Mississippi

Mississippi Visitors (n=591)

Non-Visitors (n=1435)



Recall of the Mississippi Homecoming ads

Online Ads Shown to Respondents

Bully's

Suggested Page

MS Visit Mississippi
Sponsored

You're invited to a year-long party. Welcome to Mississippi Homecoming.



Visit Mississippi
Tourist Information
86,455 people like this.

Like Page

Natchez Festival

MS Visit Mississippi
Sponsored

Want to win a weekend getaway to the Natchez area's best culinary event? Enter now!



Win a Weekend Getaway!
Win a getaway to the Natchez Food & Wine Festival, July 25-27. Some of the finest chefs in the region will host a weekend-long dinner party in the historic antebellum...

MSHOMECOMING.COM

Learn More

Like · Comment · Share · 497 · 45 · 118

Desporte Fish Market

MS Visit Mississippi
Sponsored

This year, we're celebrating Mississippi's rich flavors and culture. From tamales and fried chicken to elevated Southern cuisine, our food tastes like home. So grab a plate and join the party! No reservations required. #MSHomecoming



Like · Comment · Share · 4,040 · 193 · 957

Po Monkeys Leo Welch

MS Visit Mississippi
Sponsored

There's an event for everyone in Mississippi this year. Find one for you.



2014 CALENDAR OF EVENTS
Mississippi Homecoming is a non-stop, state-wide celebration of the people, the places, music, arts, food and culture that make Mississippi unlike any other place...

MISHOMECOMING.COM

Learn More

Like · Comment · Share · 7,470 · 216 · 2,430

Win a Weekend Getaway to Natchez Festival

MS Visit Mississippi
@visitms

Want to win a weekend getaway to the Natchez area's best culinary event? Enter now! mshomecoming.com/win



RETWEETS 3 FAVORITES 15



10:17 AM - 16 Jun 2014

Print Ads Shown to Respondents

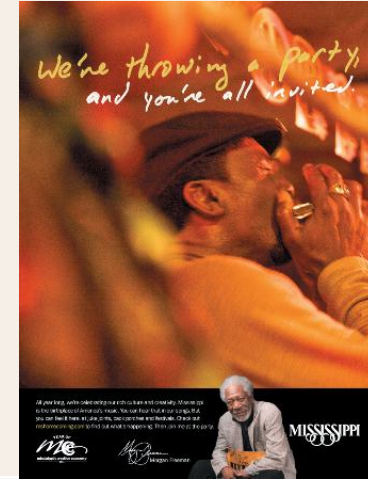
Bully's



Desporte Fish Market



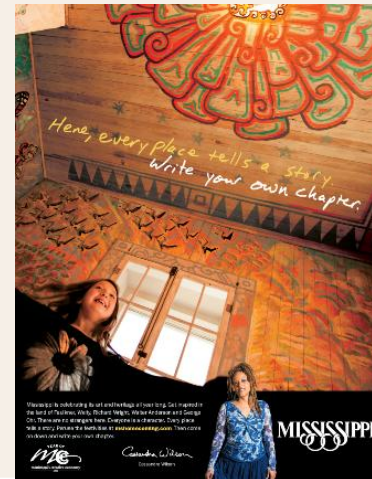
Harmonica Bean



Po Monkeys Leo Welch



Walter Anderson



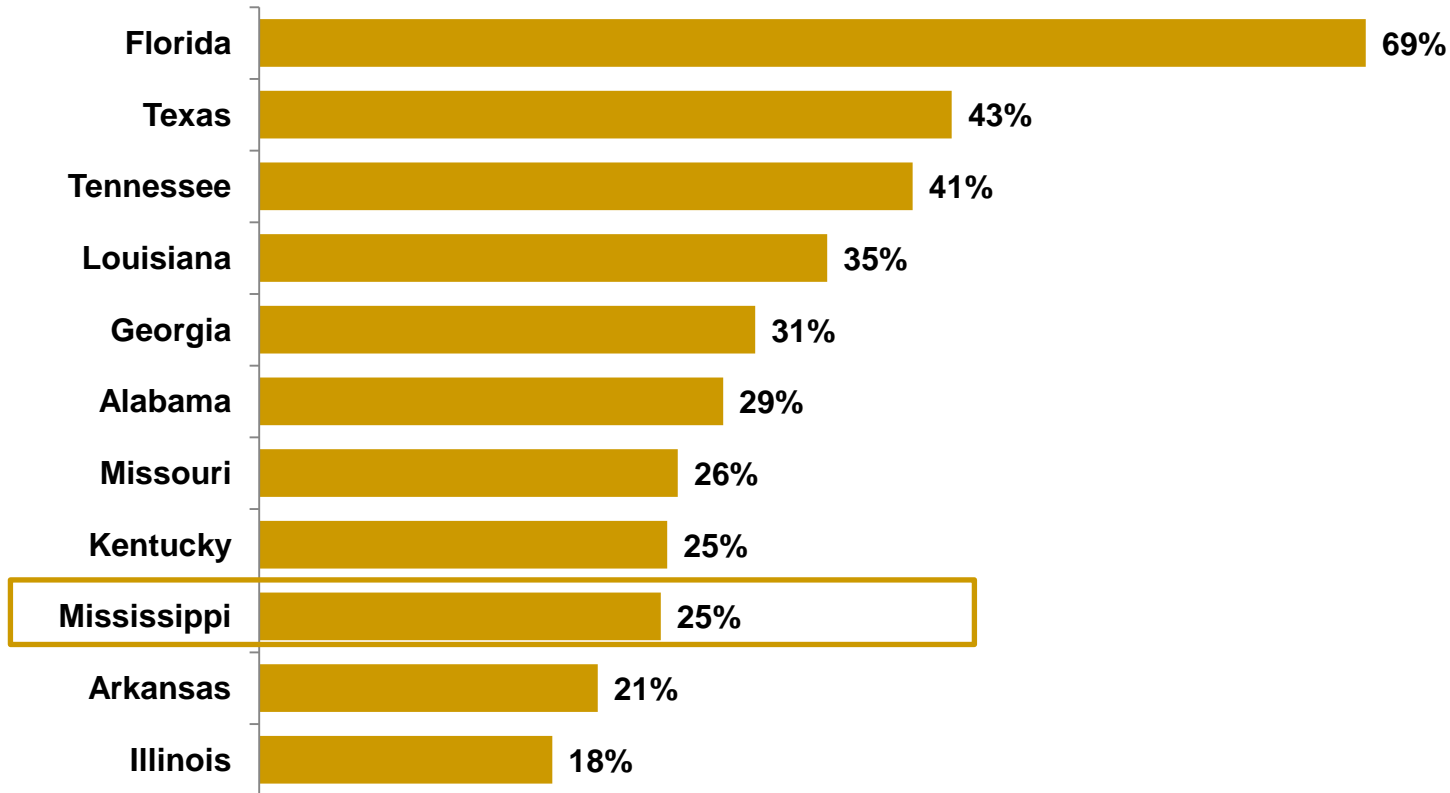
Respondents were shown one video ad.

TV Ad Shown to Participants



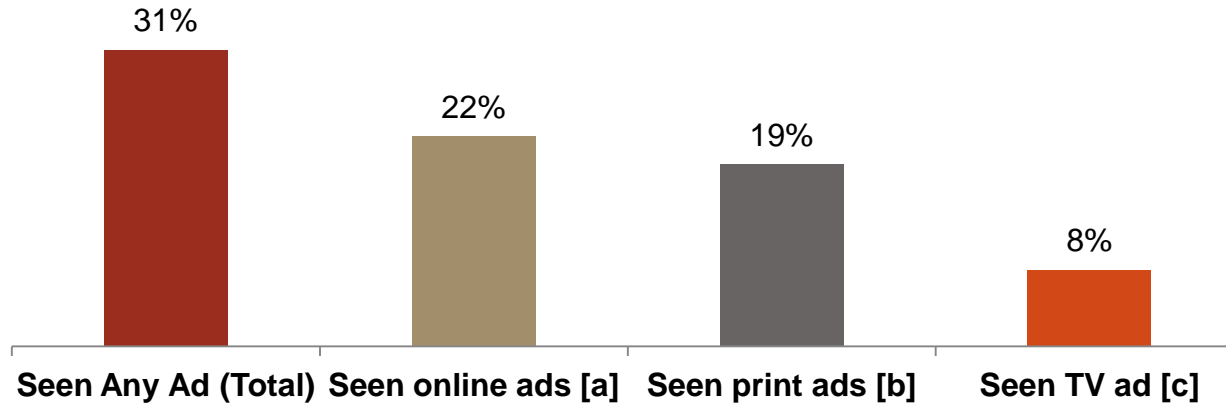
Many participants in the target market remember seeing a Mississippi Homecoming ad without prompting.

Unaided Advertising Awareness for States
(n=2,026)



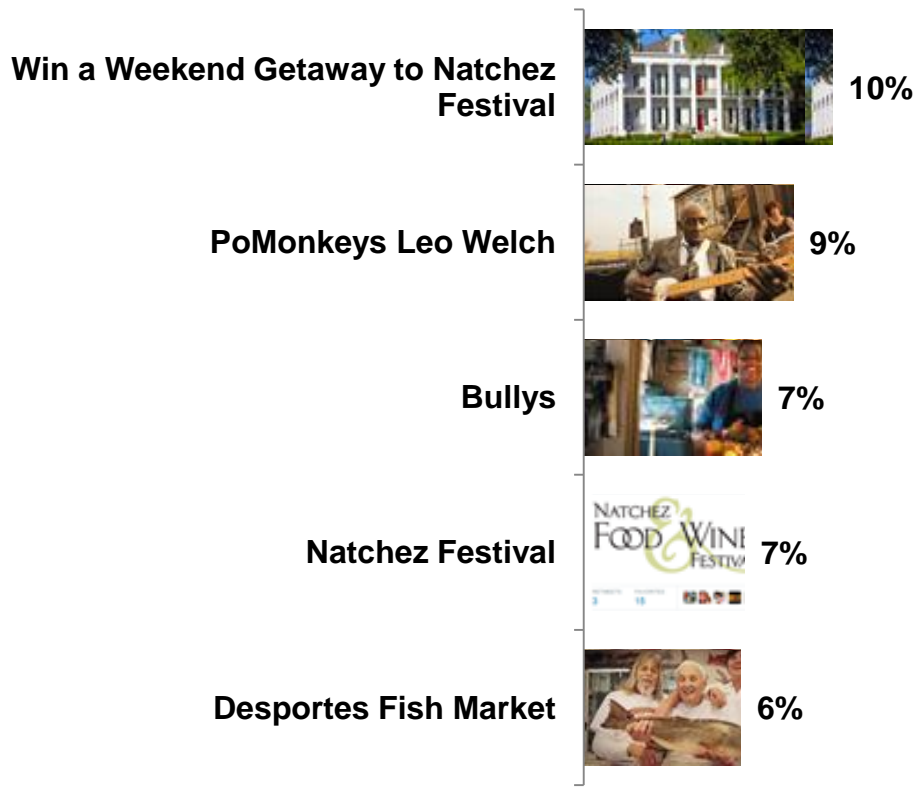
Three out of ten respondents overall recognize Mississippi's ads once shown. Online and print ads garner about equal recognition.

Percent Who Recognize Mississippi Homecoming Ads (Aided Recall)
(n=2,026)



Each of the online ads garners about equal recognition once shown.

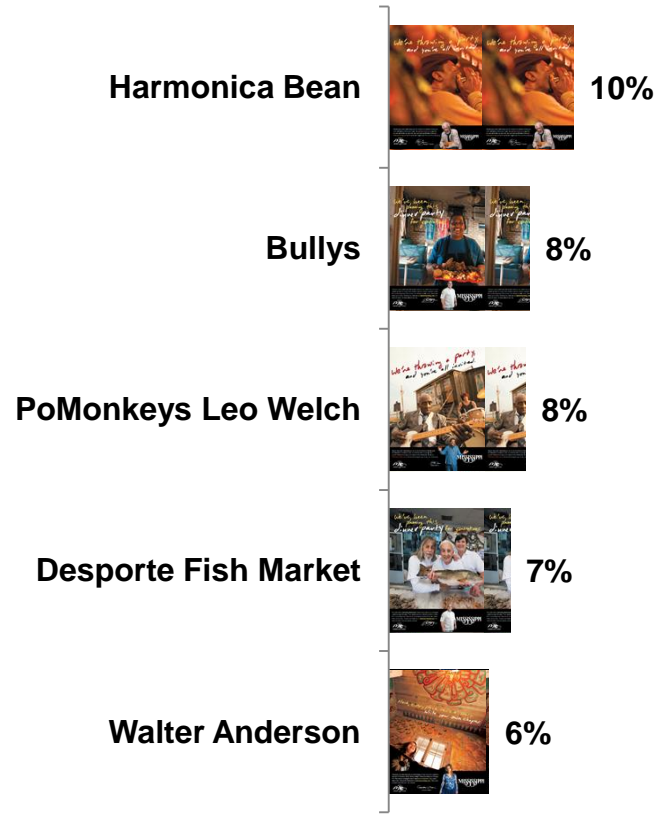
Recognize Mississippi Homecoming Online Ads (Aided Recall)
(n=2,026)



One out of five target market residents overall recall seeing any of these online ads (22%).

Each of the print ads also has about equal recognition.

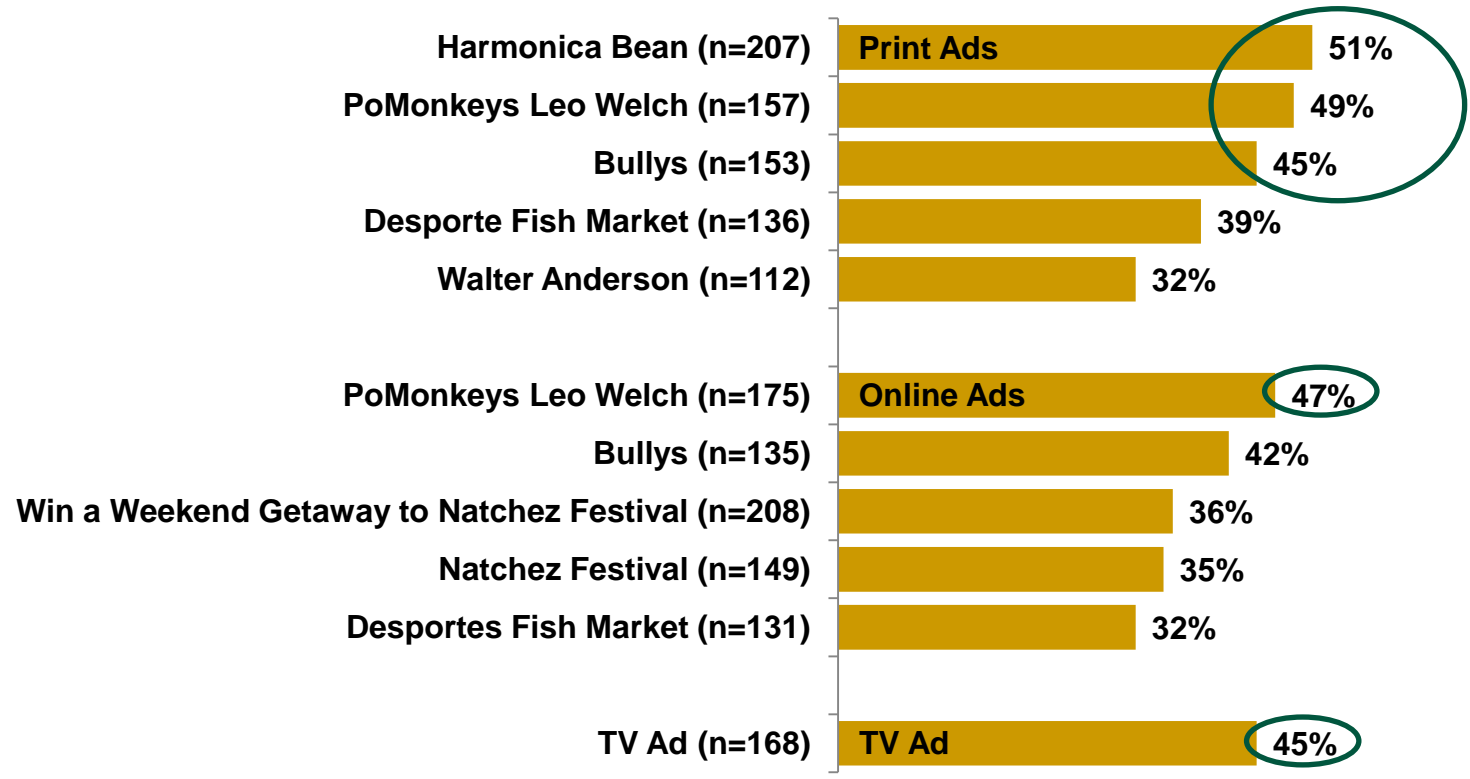
Recognize Mississippi Homecoming Print Ads (Aided Recall) (n=2,026)



One out of five target market residents overall recall seeing any print ad (19%).

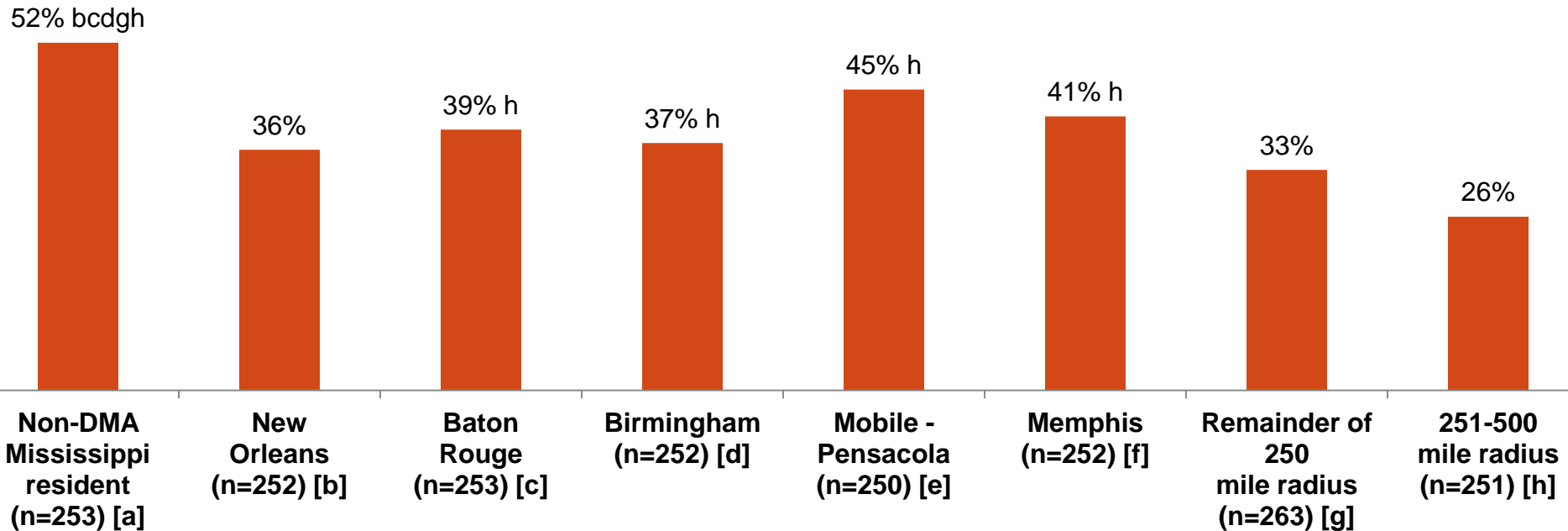
Several print ads, the Pomonkeys online ad, and the TV ad are particularly effective in spurring unaided recall of Mississippi's ads.

% Who recall advertising unaided
Among those who recognize ads (aided)



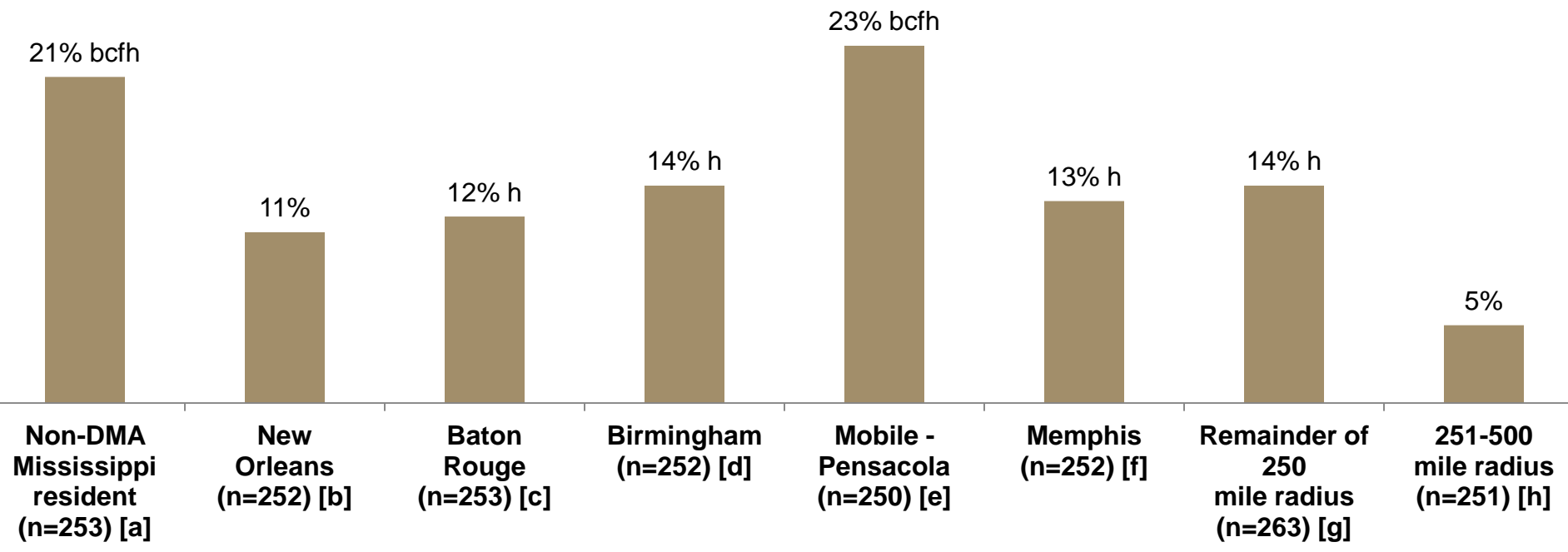
Overall, recall of the Homecoming ads is relatively consistent across geographic area.

Recognize Any Mississippi Homecoming Ad (Aided Recall)



Perhaps predictably, recognition of the TV ad varies across DMAs.

Recognize Mississippi Homecoming TV Ad (Aided Recall)



Increased exposure to Mississippi's ads is associated with a greater likelihood of considering or traveling to the state.



On average, residents of the target market recognize just under one advertisement (.85 ads, overall). At the same time, those who recognize any ad, however, recognize nearly three ads on average (2.7 ads).

Percent Who Have Considered or Traveled to Mississippi by Number of Ads Seen
Among Those Who Have Considered or Traveled to Mississippi

	Saw 0 Ads [a]	Saw 1 Ad [b]	Saw 2-4 Ads [c]	Saw 5+ Ads [d]
Have Considered or Traveled to MS	25%	25%	43%	52%

Q4. Over the past twelve months, that is, since April of 2014, which of the following U.S. states, if any, have you been to or considered going to for a leisure trip or vacation, whether or not you actually took a vacation there?
Q23 – Q33. Have you have seen this ad since March of 2014?

Reactions to the Mississippi Homecoming Ads

“[The ads] make it look even more ideal to visit – especially since it is only one state over from me.”

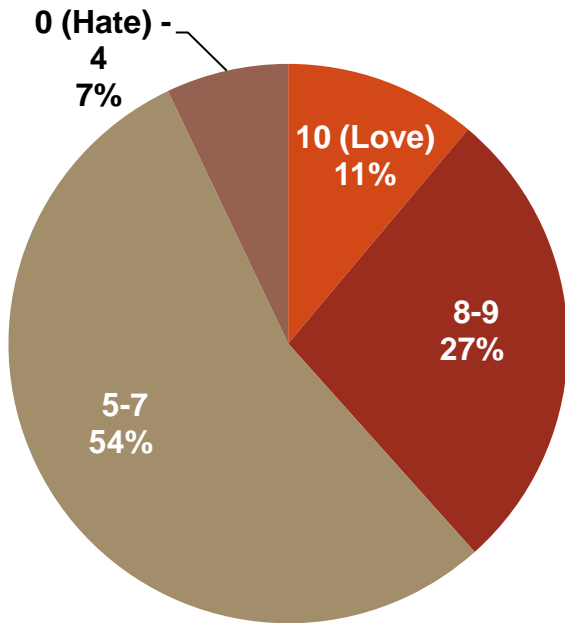
“I enjoyed all the advertising.”

“I talked with friends about a trip there – great ads!!”

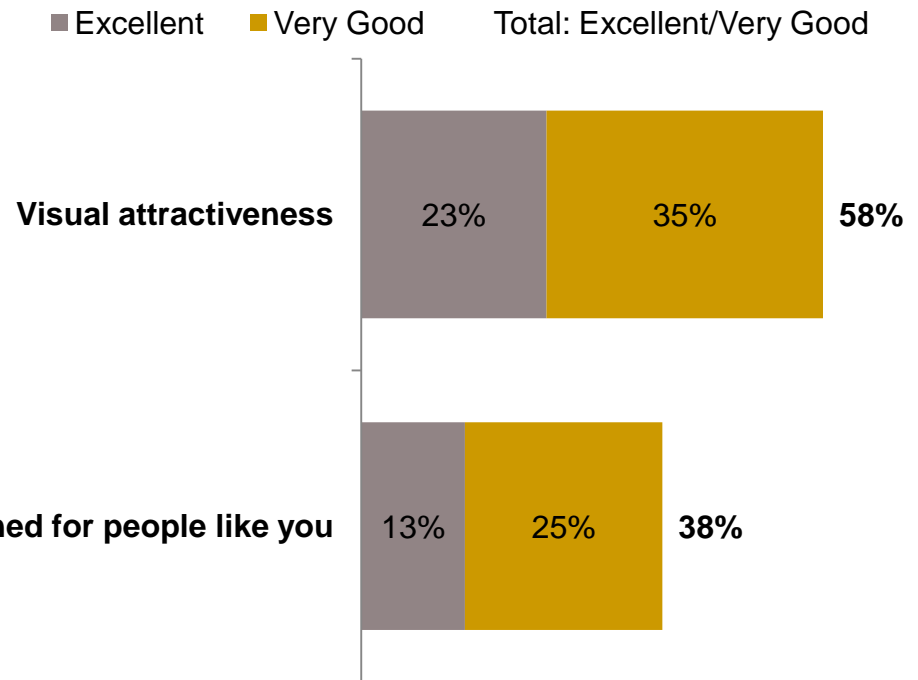
“The advertising was very good.”

Most individuals have positive reactions to the ads.

Overall Reaction to Ads
(n=2,026)

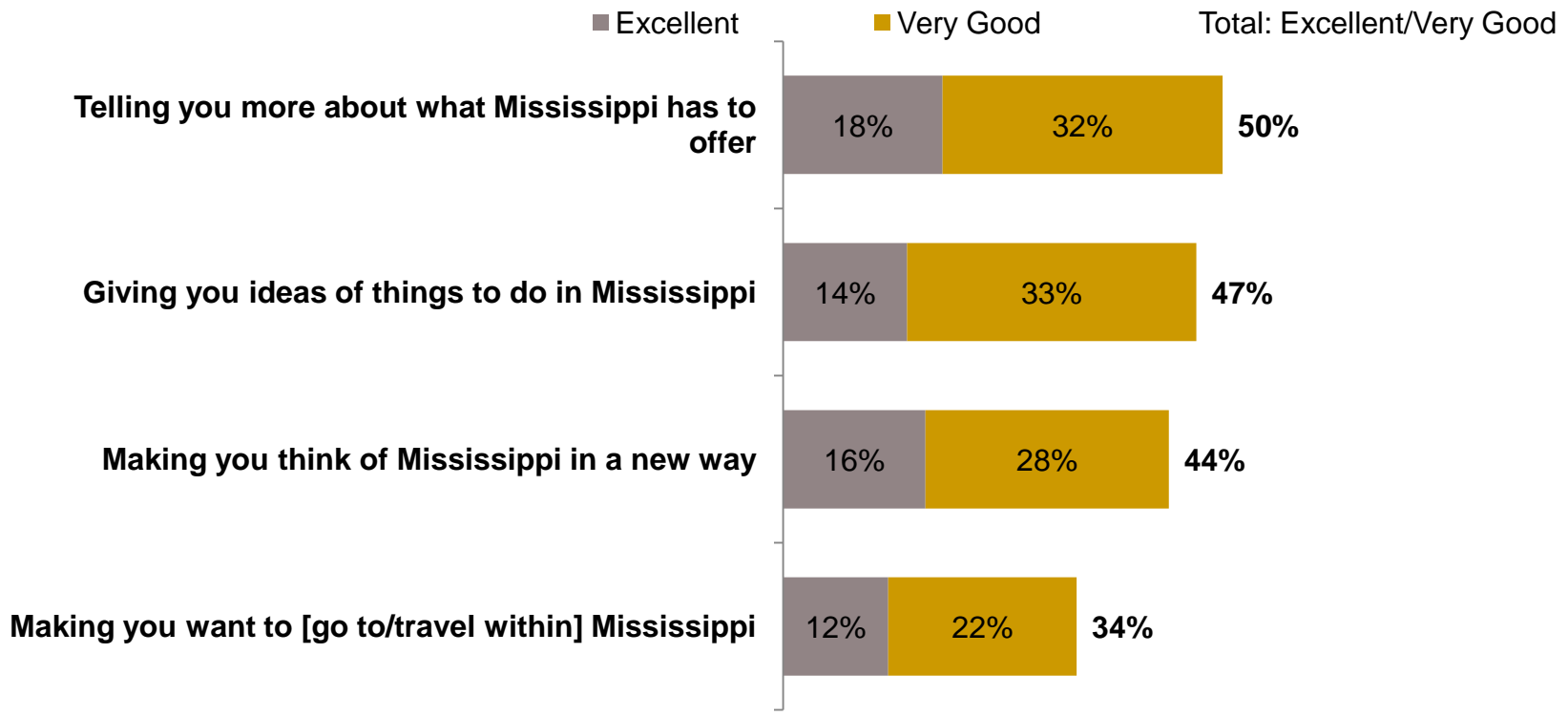


Feelings About Ads
(n=2,026)



Many participants also say the ads provide useful information, with one out of three saying the ads make them want to go to Mississippi.

Feelings About Ads
(n=2,026)



Mississippi's ads are particularly likely to encourage seeking out more information.

Actions Taken After Seeing Mississippi Homecoming Ad

Among Those Who Recognize at Least One Ad
(n=758)



The Mississippi Homecoming ads had an impact on many travelers.

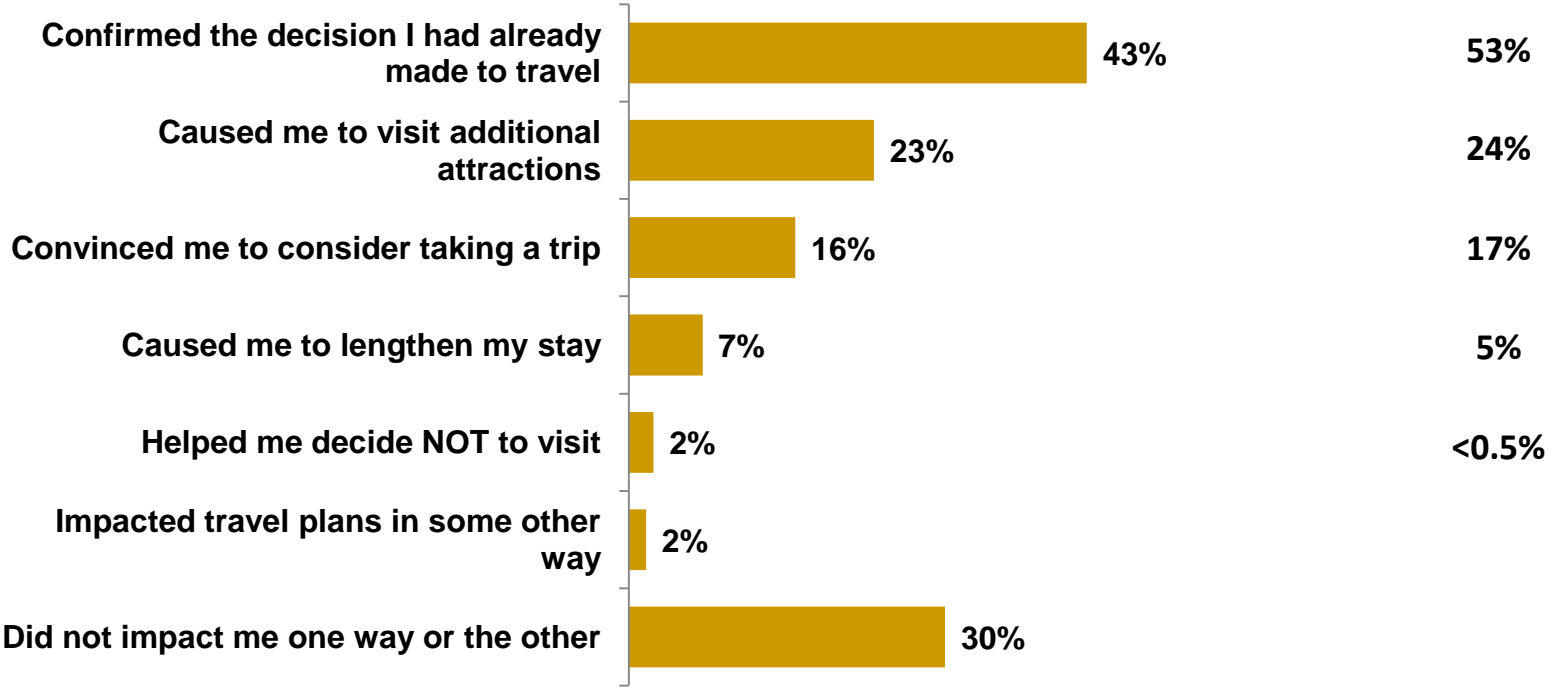


Impact of Ads on Leisure Travel Plans

Among Mississippi Leisure Travelers Who Recognize At Least One Ad (n=276)

Most Significant Impact of Ads

Among Those Who Say an Ad Had an Impact (n=180)



The Mississippi Homecoming ads also have a tangible impact on travel to the state.

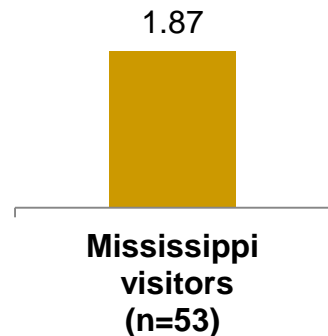


Average Number of Additional Nights as a Result of Advertising

Among Those Who Report the Homecoming Ads Impacted Their Mississippi Leisure Travel



Average Number of Additional Trips as a Result of Advertising



Mississippi visitors who take leisure trips to Mississippi that were impacted by ads estimate spending on average an **additional \$490** in Mississippi as a result of changes made to their trips after seeing Mississippi Homecoming ads.

Return on Investment From Advertising

Every dollar spent on advertising leisure travel in Mississippi returns nearly \$13 in revenue to the general fund.

- The total campaign returned nearly \$34 million to the general fund.

Advertising Return on Investment

	Total
Number of households in target market	45,542,443
Percentage of target audience influenced by ads	1.63%
Number of influenced households	741,431
Average leisure travel expenditures among those influenced	\$735
Total leisure travel expenditures among those influenced	\$544,951,764
Estimated contribution to the general fund	\$33,787,009
Return on Investment (General fund contribution divided by \$2,613,154 – MS FY 2015 advertising costs)	\$12.93

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