

MISSOURI BRAND AWARENESS &
DESTINATION AUDIT STUDY

EXECUTIVE SUMMARY
OF STUDY CONDUCTED FOR:



MISSOURI DIVISION OF TOURISM
JEFFERSON CITY, MO

February 2004

**TNS Plog Research
Los Angeles, California**

INTRODUCTION AND PURPOSES OF THE RESEARCH

TNS Plog Research is pleased to present this Brand Awareness and Destination Audit Report to the Missouri Division of Tourism (MDT). This project was conducted among leisure travelers in the Missouri marketing areas primarily to help MDT identify potential visitors and to assess awareness of and attitude toward Missouri as a destination.

Specifically, the study measures:

- Frequency of leisure travel in past 12 months
- Perceptions of Missouri and competitive states as tourist destinations
- Importance of destination attributes and their aptness to describe competitive leisure destinations
- Awareness of slogans used by Missouri and competitive states
- Importance of tourist attractions and perceived existence, by destination
- Appropriateness of selected Missouri descriptors
- Favored seasons to visit the destination
- Time of most recent visit to Missouri and visitation frequency
- Visitor satisfaction
- Usage of MDT and the Website as travel resources
- Impact of MDT materials and the Website on travel plans
- Likelihood of visiting Missouri in the future

This Report proceeds with a description of the research method, followed by an Executive Summary/Implications section, and then detailed findings. A copy of the questionnaire can be found in the Appendix.

RESEARCH METHOD

The research method utilized a web-based survey conducted among households in several advertising-campaign-targeted Designated Market Areas (DMAs) between November 6 and November 13, 2003. The sample was selected from the TNS Plog Research Panel. Potential respondents were sent an e-mail “pre-alert” that requested their participation in this research study and provided the location of the survey on TNS Plog Research’s server. To qualify, respondents must have taken at least one pleasure trip in the past 12 months that required an overnight stay and/or consisted of traveling fifty miles or further from home. Moreover, respondents had to be one of the principal travel planners in the household and 18 years of age or older in order to qualify for participation in the survey.

The study was divided into three sample groups: a representative, general market sample, a general market oversample, and an African American oversample.

- The ***representative, general market sample*** represents individuals in each of four market tiers – Tier I Markets, Tier II Markets, Tier III Markets, and In-State Markets; each of the four tiers is comprised of a number of designated marketing areas (DMAs). The sampling procedure quota was 300 respondents for each of the four tiers; each DMA within a tier was assigned a quota representative of the market size. Of 5,867 invitations e-mailed across the four tiers, 1,222 completed surveys were collected from the representative, general market sample across the four tiers, yielding a 21% response rate.
- The ***general market oversample*** is comprised of the same four tiers and the same DMAs as the representative, general market sample, but is not representative of individuals in those markets. The primary purpose of this sample is to increase the base size of completed surveys in those DMAs where the representative, general market sample would not deliver enough respondents to allow any valid analysis. 4,667 invitations were e-mailed for the ***general market oversample*** and 1,042 completed surveys were collected across the four tiers, resulting in a 22% response rate.
- In total, 10,534 invitations were e-mailed for both the ***representative, general market sample*** and the ***general market oversample*** together; 2,264 completed

surveys were collected from both samples across the four tiers, yielding a 21% total response rate. **To reiterate, the oversample is developed only to obtain detailed information for specific DMA markets and is not utilized in this report.**

The markets are divided into four general market segments: In-State residents and those living in one of three Out-of-State market tiers. MDT's market tier designations signify propensity to vacation in Missouri. Tier I markets demonstrate the highest propensity to visit; the Tier III market shows high propensity to visit, although not as high as tier I and II markets. Tier designations are based on a weighted ranking of several factors, including category and brand development indices (CDI and BDI), driving time to Missouri, and media costs.

- The ***African American oversample*** is comprised of African-American residents in three metropolitan areas: Chicago, Memphis, and St. Louis. **This sample group was added to the representative, general market sample and the DMA oversample to allow isolated analysis of marketing efforts specifically geared towards this ethnic group within the Missouri marketing area.** The sampling procedure targeted 150 respondents for each of the three cities. Of 3,589 invitations e-mailed across the three markets, 435 completed surveys were collected from the African American oversample, yielding a 12% response rate.

This report analyzes the results of this survey by focusing on the representative, general market sample in four marketing areas, Tier I, Tier II, Tier III, and In-State Markets. In many sections of the report, Tiers I – III are combined for a total Out-of-State Market view. **Throughout this report, the research results focus on the representative, general market sample in order to maintain the integrity of combined markets.**

The inclusion of the oversample of smaller markets would give them a disproportionately high weight in the totals and subtotals. Only the African-American markets, which would otherwise be too small to provide analytical reliability, use the oversamples, as noted throughout the report.

A full set of data tables is provided to allow the reader of this report to “drill down” on certain sample sub-groups and/or designated marketing areas based on the findings detailed in this document.

TNS Plog Research supervised all fieldwork, editing, coding, and tabulating of the results. A copy of the questionnaire can be found in the Appendix.

EXECUTIVE SUMMARY

The survey assesses Missouri's brand awareness and destination choices among travelers in its market area, which is measured in four groups: In-State residents and those living within three Out-of-State tiers. The Out-of-State tiers are based on market viability: Tier I (most viable) through Tier III (high, but least viable of the three tiers), as described in greater detail in the methodology. Generally, despite some slippage in visitation to Missouri in 2003, Missouri reaps high scores on image, interest, and satisfaction measures.

With few exceptions, scores on measures for Missouri are highest among In-State residents, followed by ascending tier level – with Tier I typically gathering more robust scores than Tier II, which, in turn, usually ranks above Tier III. Aided somewhat by being near the center of the market tiers, nearly two-thirds (61%) of Out-of-State residents have visited Missouri at some time; only Illinois (64%) and Texas (60%) are serious competitive challengers. Among In-State residents, Missouri (90%) clearly leads other destination choices, including Illinois (74%) and Texas (58%).

THE APPEAL OF MISSOURI

In general, Missouri delivers high levels of satisfaction to its visitors as measured in two ways: three-quarters of Out-of-State (73%) visitors say that they are *extremely* or *very satisfied* with the last visit (even higher among Missouri residents, 87%). Further, the high number of *repeat visits* indicates they find what they want (Out-of-State visitors had been to Missouri an average of 11 times before their last visit; 29 times for Missourians). Specifically, Missouri:

- **Strongly Attracts Recent Visitors.** Three out of five (61%) Out-of-State travelers have visited Missouri in the past and more than a third (37%) of those visitors were there in 2003; further, two-thirds (68%) have been there since 2000. Importantly, the recency of these visits surpasses results found with other destination research conducted by TNS Plog Research. That is, Missouri suffers less from “*been there, done that*” than others.

Of course, the proportions vary by market region. In-State residents are most likely to have traveled in Missouri sometime (90%), followed by Tier I (78%), Tier II (61%), and Tier III (44%).

- **Generates Frequent Returns.** Not only have respondents traveled to Missouri recently, but they tend to return again and again. At some time in their past, the average Out-of-State traveler in the Tier markets had been there **11 times before their most recent visit**. Of course, the repeat trips are much higher for In-State (29) and Tier I (15) residents, but even those living in the less viable markets (Tier II at 10 times and Tier III at six times) have been there frequently.

Further, in order to compensate for possible commuters, family care-givers, or other repetitive situations, those taking more than 25 trips can be excluded. A frequent return rate remains even after this adjustment (Total Out-of-State = 6 trips, In-State = 11 trips, Tier 1 = 8 trips, Tier II = 6 trips, and Tier III = 4 trips).

- **Visitors Return Home Satisfied.** Three-quarters (73%) of Out-of-State visitors report that they are *extremely* (23%) or *very satisfied* (50%) with their last visit and almost no one (3%) leaves *unhappy*. This measure is especially important because it indicates what visitors tell others when they return home; leisure travelers cite *friends' and family's recommendations* as a leading source of information (42% from TNS Plog Research's AMERICAN TRAVELER SURVEY, rivaled only by the Internet's 43%) when deciding on places to go on vacation.

This *extremely* or *very satisfied* measure is stronger in the In-State (87%) and most viable Tier I (79%) markets, but gathers a respectable two-thirds showing in the Tier II (70%) and Tier III (67%) markets.

- **Rates Highly on Other Key Images.** About two-thirds of the Out-of-State market residents consider Missouri to be a *great road trip destination* (62%), one that *offers a slice of real America* (64%), and is a *good place for a classic family vacation* (63%), with little variation among the three measures. As might be expected, In-State residents rate all three images much higher (78%, 81%, and 83% respectively).
- **Generates Future Interest.** A high proportion of residents in these markets (In-State at 72%, Tier I at 38%, Tier II at 25%, and Tier III at 15%) expect to visit (*extremely/very likely*) Missouri in the next 12 months – very high scores considering the vast array of choices available to leisure travelers.

- **Travel Is Seasonal.** Travelers reflect overall US travel patterns; they are most likely to choose to visit Missouri during the peak summer season (43% Out-of-State; 45% In-State). The greatest market variations (Out-of-State/In-State) occur during Spring (21%/43%) and Fall (19%/41%). Winter (2%/8%) tends to be avoided, except for a small reprieve near Christmas (8%/25%).

MISSOURI'S IMAGE

Missouri maintains a strong image among its most competitive states, which include: Arkansas, Colorado, Illinois, Indiana, Iowa, Kentucky, Michigan, Mississippi, Oklahoma, South Dakota, Tennessee, Texas, and Wisconsin. Missouri:

- **Ranks High as a Leisure Destination.** Out-of-State travelers consider only *Colorado* (57%) and *Texas* (47%) as a state leisure destination more often than *Missouri* (40%). *Wisconsin* and *Tennessee* (each at 38%) vie for fourth place, very competitive with *Missouri*.

Among Tier I residents, *Missouri* ranks second (56%) after *Colorado* (62%). *Missouri* residents place their home state in the top spot (64%), somewhat ahead of *Colorado* (55%) and *Texas* (42%).
- **Has a Recognizable Slogan.** Texas' slogan "*It's Like a Whole Other Country*" gives its state a boost from reminding travelers of its history (58% Out-of-State/59% In-State), but Missouri ("*Where the Rivers Run*") ranks in a respectable second place (43% Out-of-State/40% In-State), far ahead of third place Arkansas (31% Out-of-State/30% In-State). Since familiarity and awareness of destination correlate highly with travelers' interest in visiting it, it is important for destinations to achieve recognition.
- **Missouri's Image vs. Importance:** Except for the top five attributes in importance: *safe/secure* (4.36), *beautiful/scenic* (4.31), *reasonable costs* (4.25), *lots to do* (4.20), and *great getaway destination* (4.15), actual ratings for Missouri by In-State residents are higher (and often much higher) than the importance level that respondents assign to them. Further, Tiers I – III residents rate Missouri above the importance level on half of the items.

- **Missouri's Image by Market:** Not surprisingly, Missouri's image wanes with lower market viability. Although the competitive set is somewhat different for each market, Missouri tops the list for all but two of 17 items (*historical and cultural sites* and *great place to golf*, which rank second) for **In-State** travelers. **Tier I** residents usually place Missouri in the top third of 13 competitors. The scores slip further as market viability lessens in **Tiers II** and **III**; these travelers place Missouri in the middle or slightly lower among 14 competitors.
- **Activities by Importance:** Similar to the image items, *beautiful surroundings/countryside* (4.32) tops the importance list. *Quality restaurants* (4.04), *hotels* (3.88), *historic sites/national monuments* (3.69), and *outstanding state parks* (3.55) complete the top five with each receiving a score exceeding 3.5.
- **Missouri's Activity Awareness by Market:** As just noted for image, Missouri's awareness is very strong among **In-State** residents when compared to nine key competitors – Missouri outperforms all other states for 33 of the 37 activities. Those living in **Tier I** put Missouri in the top three states (of 13) on half (19) of the 37 activities; those in **Tiers II** and **III** place Missouri toward the middle or lower. Generally, Missouri achieves recognition for having a variety of activities, but awareness for all can be improved.

DEMOGRAPHICS

As noted in the methodology, these results are based on the **representative, general market sample** of Missouri's markets, except for the African-American segments. The travelers in these markets reflect general national traveler characteristics with regard to education and income, but skew slightly younger. These residents (Missouri Out-of-State; Missouri In-State; US Travelers from TNS Plog Research's **2003 AMERICAN TRAVELER SURVEY (ATS)**):

- Tend to be younger (45; 46; 48 Missouri Out-of-State; In-State; ATS, respectively).
- Earn similar household incomes (\$54,200; \$55,100, \$53,200 Out-of-State; In-State; ATS respectively). African-Americans (\$42,000, oversample) and residents in the more rural Tier I (\$46,100) market earn somewhat less.
- Match US proportions of college educated residents (38%, 34%; 38% Out-of-State; In-State; ATS, respectively).

- Indicate less ethnic diversity. In the representative, general market sample, a larger majority (91%; 93%, 84% Out-of-State; In-State; ATS) of Missouri market travelers indicates Caucasian; fewer select African-American (2%; 2%; 7% Out-of-State Representative, general market sample; In-State Representative, general market sample; ATS).
- Report fewer married couples (64%; 68%; 74%); also, fewer males (24%; 19%; 45%) are the household contact for the survey (Out-of-State; In-State; ATS). These proportions are similar for all viable markets, but the African-American oversample reports even fewer males (14%) and fewer married couples (42%).

SUMMARY OF SPECIAL MARKET: AFRICAN-AMERICANS

Of course, the main goal of the Missouri Division of Tourism is to bring visitors to the state, including appealing to African-Americans. Although the income of this group is lower than the representative, general market sample, other profile characteristics are encouraging (African-American oversample; Representative, general market sample):

- As noted above, the African-Americans travelers earn somewhat less (\$42,000; \$54,500). However, they tend to be younger (38; 45) and equally as educated as other travelers (36%; 37% hold college degrees).
- Using family composition as an indicator, *they may favor family-oriented destinations to a greater degree than the representative, general market sample*: a larger proportion lives in households with children (49%; 38%) and there are more people per household (3.0; 2.7). However, fewer are married (42%; 65%).

As a group, the African-American image of Missouri is relatively strong, but somewhat below that of Caucasians. **African-Americans:**

- **View Missouri Favorably.** Overall, they rank Missouri fourth among the 14 listed states that may be considered as leisure destinations (Missouri 39% vs. Tennessee 46%, Illinois 41%, and Texas 41%, but above Michigan 36%).
- **View Missouri Differently by Residence.** As expected, Out-of-State African-Americans place Missouri lower than those living In-State. **Chicago** residents

place it eighth (24%; well behind top-placed Wisconsin, 63%, and Michigan, 56%); **Memphis** residents position it fifth (42%; Tennessee, 66%, and Mississippi, 53%, are at the top). Among In-State (**St. Louis**) residents, Illinois (54%) and Missouri (53%) share the lead. By comparison, the Out-of-State representative, general market sample ranks Missouri third (40%); the In-State representative, general market sample places it clearly in the lead (64%).

- **Are Slightly Less Likely to Have Experienced Missouri.** While **St. Louis** African-Americans (91%) match the In-State representative, general market sample residents (90%) for visiting Missouri in the past, African-Americans from **Chicago** (44%) and **Memphis** (52%) are less likely than Out-of-State (61%) representative, general market sample travelers to have been there.
- **Report Less Aware of the State Slogan.** Caucasians (42%) more accurately assign Missouri to its primary slogan: “*Where the Rivers Run*” than African-Americans (30%). Although half as many African-Americans (15%) also recognize “*Check Out Your Backyard*,” together, fewer than half (45%) pick one of the two slogans for Missouri.
- **Are Positive, But Less So Than Caucasians.** Overall, they rate Missouri’s image below Caucasians on key dimensions and satisfaction (African-Americans; Caucasians): *great road trip destination* (62%; 66%), one that *offers a slice of real America* (53%; 69%), a *good place for a classic family vacation* (57%; 68%), and *overall satisfaction* (70% vs. 79%).
- **The Pattern Repeats for In-State Comparisons.** African-Americans’ (St. Louis) image ratings place below those of Missouri (representative, general market sample) residents: *great road trip destination* (70% vs. 78%), *offers a slice of real America* (65% vs. 81%), *good place for a classic family vacation* (69% vs. 83%), and *overall satisfaction* (74% vs. 87%).
- **And for Out-of-State Comparisons As Well:** While Memphis tends to be more reflective of the out-of-state representative, general market sample, Chicago’s African-American image ratings trail (Chicago; Memphis vs. Out-of-State Representative, general market sample): *great road trip destination* (52%; 66% vs. 62%), *offers a slice of real America* (46%; 48% vs. 64%), *good place for a classic family vacation* (46%; 58% vs. 63%), and *overall satisfaction* (61%; 72% vs. 73%).

- **Despite the Lower Ratings, They Still Express Strong Future Interest.** Despite the lower ratings, the same proportion of African-Americans expect to visit (*extremely/very likely*) Missouri in the next 12 months as Caucasians (37%), with predictably stronger interest among those living in/near St. Louis (67%) than Memphis (31%) or Chicago (19%). For comparison, the representative, general market samples are similar (In-State at 72%; Out-of-State at 26%).
- **Missouri's Image vs. Importance by Ethnicity.** African-Americans consistently consider the listed attributes to be much more important than the representative, general market sample. Of the items rated by both groups, only *wineries to visit* receives a higher importance consideration from the representative, general market sample. In addition, there is a wide gap between the importance level and Missouri's ratings for each image item. Only five of Missouri's 13 image items meet or exceed the importance level in any African-American market and each of these receives relatively low importance scores (*nightlife options, theme parks, theatre options, professional sports, wineries to visit*).
- **Nightlife Options, specifically.** The leading item that African-Americans consider when choosing a destination is whether it is a *safe and secure place* (4.6 on a 5-point scale). The total market also places *safe and secure place* at the top of importance, although with a slightly lower rating (4.4). In comparison, *nightlife* (3.3) ranks ninth out of 13 attributes for African-Americans (the total market does not rate it). Although *nightlife* ranks as less important than many other attributes, African-Americans rate Missouri relatively strongly for it (Missouri ranks first among competitors in the St. Louis market, second in the Chicago market, and third in Memphis).
- **Missouri's Image by Ethnic Market.** Distance counts. Missouri achieves greater recognition than any of its eight competitive states for ten of 13 image items among those living in the **St. Louis** area, usually places second or third of five competitors in the **Memphis** area, and most frequently ranks fourth or fifth of six competitors among residents near **Chicago**.
- **Selected Activities by Importance Among African-Americans.** Presented with a much shorter list, this ethnic group also ranks activities much differently from the representative, general market sample: *African-American attractions (museums)* ranks as the most important item vs. nearly last for the representative,

general market sample and *top amusement parks* ranks second (3.52 vs. 2.94 among the representative, general market sample). *Historic sites/national monuments* (3.40 vs. 3.69) receives high marks from both sample groups while *music festivals* (3.33 vs. 2.79), and *comedy clubs* (3.20 vs. 2.52) have much greater appeal to African-Americans. ATS results show very similar **participation** levels (importance is unavailable) between the total sample and African-Americans on *historic sites/churches* (30%) and *museums/art galleries* (21%), but much higher among African-Americans on *theme parks* (35% vs. 25%).

- **Missouri's Activity Awareness by Market Among African-Americans:** Again, proximity aids awareness. Awareness of the activities available in Missouri is strongest among **St. Louis** residents, who rank Missouri first among nine key state competitors on 14 of the 16 activities. Those living in **Memphis** often rank Missouri third (of 5) on nine activities, usually trailing Illinois and Texas. Those in **Chicago** appear more familiar with Missouri's high-brow features, rating it first or second of six states on *music theatres, Broadway-style theatres, comedy clubs, and art galleries*; however, they consider competitors stronger on outdoor activities (*canoe/boat/float trips, hiking/biking trails, golfing*).