

H2R Market Research

Reveal Your Customer's Full Experience

Springfield, MO
2019 Brand Perception Research

Delivered September 2019

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Purpose. The purpose of conducting the Springfield, MO 2019 Brand Perception Research was to better understand the perceptions of Springfield among the target market (those living within 300 miles of Springfield), as well as to track how perceptions may have changed over time.

Target Audience. This research was conducted among a general population cell of travelers living within 300 miles of the Springfield area. Additionally, a house list of email addresses from the Springfield Convention & Visitors Bureau was provided to boost sample size and lower margin of error.

Sample. A total of 569 responses were collected, providing a maximum Margin of Error of +/-4.1% at a 95% Confidence Interval. This includes 400 responses from the general population and 169 responses from the house list.

The background image shows a cityscape in Springfield, Missouri. On the left, the Heers Building is visible, a multi-story brick structure with a prominent sign on its upper section that reads "HEERS". To the right is a taller, modern white building with many windows. In the foreground, there is a park area with green grass, several trees, and a stone wall with the words "Park Central Square" carved into it. A large, semi-transparent dark grey triangle is overlaid on the left side of the image, containing the text for the report.

Springfield 2019 Brand Perception Research

Executive Summary

Awareness & Potential Remain Strong

- Springfield is a top of mind Missouri destination ranking 3rd among regional travelers behind Branson and St. Louis. Aided awareness of Springfield remains high at 94%, similar to St. Louis (96%), Kansas City (96%) and Branson (95%). The high level of aided awareness is paralleled by an increase in general advertising awareness, which started at 20% in 2014 and has increased to 35% over the past 5 years.
- Market Potential for Springfield remains at two-thirds of the marketplace (67%). Over the past 2 years, Springfield has converted 34% of that Market Potential into visitation. Good news, Retention is even stronger, as 46% of those who have ever visited the Springfield have returned in the past 2 years.
- Because Springfield has converted all but 27% of its available Market Potential, the potential for incremental growth among new visitors is quite small. Therefore, the “lowest hanging fruit” will come from increased visitation, frequency and retention among past visitors or convincing confirmed non-visitors of putting Springfield, Missouri in their consideration set.



Springfield is Shareworthy

- In 2014, half of all travelers living in the target market associated Springfield, MO with the legendary U.S. Highway Route 66—more than any other destination. However, this association has declined to 40% since that time while St. Louis has remained at 46%. Route 66 associations among those most familiar with the area (house list respondents) have increased from 66% in 2014 to 75% this year.
- Travelers still have a favorable opinion of the Springfield area. More than 6 in 10 travelers have a somewhat/very positive opinion of Springfield, a significant 7-point increase over 2016. Additionally, more than one-third plan to visit Springfield in the next 12 months while more than half (58%) would recommend Springfield to their friends and family.
- Springfield's Net Promoter Score (NPS) stands at 43%, higher than the competitive set average of 30% and H2R's Proprietary Industry Norm (H2R Norm) of 25%. More good news, those on the house list have significantly increased their intent to recommend Springfield up from 11% in 2014 to 50% this year.



Midwestern Town Full of History

- Over the past 6 months Springfield has been the topic of conversation. More than two-thirds of travelers report hearing others talk about the area – with more than one-quarter stating they have heard people talking about Springfield often/very often. During that same 6 months, 31% of travelers say their opinion of Springfield has become more positive, while only 2% indicate they have a more negative opinion. This net change of +29% toward positive opinions is significantly higher than the H2R Norm of +19%.
- The top characteristics that most define Springfield continue to be *family friendly* (70%), *casual* (69%) and *down to earth* (63%). And, travelers most associate The Ozarks (74%), Bass Pro Shops (70%) and The Great Outdoors (62%) with Springfield. All three of these characteristics experienced significant increases over 2016 measurements.
- Travelers are also most likely to describe Springfield as a *Midwestern town full of history and heritage* (47%), which is on par with previous measurements. However, this year travelers are less likely to describe the area as *a gateway to the great outdoors* (-3 pts), *a metropolitan city with small town charm* (-4 pts), *the pulse of The Ozarks* (-4 pts) and/or *Classic Americana* (-8 pts).



Springfield is Known for Its Hospitality

- When considering leisure travel, Travelers say they most desire a friendly destination (82%), a variety of things to do (81%) and a place that is easy to find your way around in (77%). Those who have visited Springfield recently are most satisfied with these attributes and more. They rate the family attractions in the area highest (71%) followed by ease of wayfinding (65%) and variety of things to do (63%).
- Plotting the importance and satisfaction of these characteristics on a four-quadrant graph, we can quickly ascertain Springfield's strengths and areas of concern through the eyes of the visitor. Springfield has many strengths, i.e. ease of wayfinding, friendly people and variety of things to do. Unfortunately, the lack of unique things to do remains an area of concern.
- Nearly three-quarters of visitors believe that Springfield delivers on its brand promise—on par with 2016 (77%). Furthermore, 87% of travelers say they have a somewhat/very positive opinion of The Ozarks, up 5 points since measurements began in 2014.



Visiting & Making Memories Together

- More than one-third of travelers visit Springfield for the purpose of a vacation/getaway. Visiting friends and family is also popular (22%) but has declined in favor of recreational day trips (20%, +6 pts). Visitors are satisfying their higher-order emotional needs when making a trip to the area as well. Nearly two-thirds say they visit because it is an activity their whole family can enjoy together (+18 pts) and to make memories with their family (56%, +14 pts).
- Three-quarters of visitors stayed 2-3 nights on their most recent visit to the area. Most chose to stay in Springfield while visiting the area(67%), followed by Branson (29%).
- Those who haven't visited Springfield are most likely to say that it is because they have other destinations they prefer to visit (56%) or it just never comes to mind (49%). However, when correlated with their Intent to visit in the future, we find that the actual barriers preventing most from visiting are Springfield doesn't come to mind or that there are not enough "must sees" compelling them to visit. Springfield non-visitors tend to be younger, earn a lower income, are more likely to have children and are more likely to be a minority than those who have visited the area.



Thoughts to Consider

- **Springfield has many wins to celebrate.** Since 2014, Springfield has grown its marketing awareness; narrowed the focus of its message to simpler, unifying messages; leveraged brand advocacy and connected with travelers emotionally. All of these things have helped Springfield maintain strong brand health relative to similar-sized competitors around the region. Of course, there is always room for improvement, and we have a few ideas for consideration.
- **Emotional Connection.** Springfield has many terrific guest experiences and functional activities for travelers to choose from. But, like most destinations, the primary reason for traveling tends to involve travelers' higher order emotional needs. Springfield visitors indicate their primary emotional drivers are reconnecting with friends and family and/or the desire to make memories with their families. Finding ways to share Springfield's functional drivers in a way that also leverages these emotional connections may help generate trial from new travelers and/or help generate repeat visits from past visitors. As they say, "sell the rapids, not the river." Or, better yet, sell the emotion of the experience, not the elements that comprise the location.
- **Leverage Brand Promoters.** Consumers today have little trust in advertising, but they do tend to trust each other. In fact, most consumers put greater faith in anonymous online reviews from past brand users than they do paid advertisements for the same product or service. In the age of social media, the experience itself is often the best form of marketing. This is why recommendations from trusted sources have become the gold standard in consumer influence. And, this is why customers generated through word of mouth reportedly have a lifetime value worth 4 times that of customers generated through any other type of advertising. The Springfield CVB may wish to consider ways to proactively leverage their brand promoters by providing them with the information and resources necessary to help them encourage others to visit.

Thoughts to Consider

- **Sell Your Anchor Tenants.** Destinations cannot afford to try to be all things to all people and Springfield has done an excellent job of featuring individual travel experiences around the area in its marketing efforts. However, because “no compelling must sees,” are a significant barrier to visitation, we recommend continuing to leverage Springfield’s biggest/best tourism assets too. That is, create authentic custom imagery around these experiences and keep telling individual stories relating to these brands in a way that makes them feel like a “must see.” It is also worth pointing out that one-third of Springfield visitors spend at least one night in Branson on their visit. Turning the tables, there is a case to be made for marketing one or two of Springfield’s most popular guest experiences and using regional intercept marketing to help fill the pipeline for both the present and future visits to The Ozarks.
- **Consider Activation Marketing Efforts that Leverage the House List.** While acquisition is always important for keeping the pipeline full and ensuring long-term success, Springfield’s primary trade area (within 300 miles) continues to offer the “lowest hanging fruit” since this is where prospects live who are most familiar with the destination. As a result, decision makers may wish to leverage its house list supporters toward an ongoing “Activation” marketing campaign. That is, continue to proactively leverage email promotions, social media, direct mail and other one-on-one marketing channels within the region to deliver messaging content tailored to individual travelers’ needs based upon their past behavior or interests. As McKinsey & Company says, “If marketing has one goal, it is to reach consumers at the moments that most influence decisions.” This is precisely what activation marketing is all about.

Thoughts to Consider

- **Leveraging the Ozarks in Acquisition Efforts.** Because Springfield has done a great job of converting a large share of its raw market potential within 300 miles, there remains fairly limited opportunity to make additional headway in pursuing trial among Considerers in the region. Therefore, some thought should be given to reaching Non-Visitors in the region who currently have limited interest in visiting Springfield or extending Springfield's marketing reach beyond the immediate region. And, if targeting Prospects from beyond 300 miles, it may be wise to consider more of a "packaged message" that leverages other partners across the Greater Ozarks Region. The Ozarks Research Study conducted earlier this year revealed that together The Ozarks deliver more compelling consideration gravity than can any one Ozarks destination by itself.
- **Precision feeder market insight.** To strategically determine which geographic areas to consider targeting, H2R recommends the Springfield CVB consider conducting additional research to determine precisely where Springfield's visitors are coming from. The H2R Scout Report provides an ideal solution for determining precisely how much visitation each feeder market provides (as well as what day, month and season of the year they visit). This report is fueled by new technology that delivers thousands and thousands of traveler observations which provide a level of precision never before offered in the Travel Industry.
- **Test Before you Rest.** Marketing and Media Effectiveness Studies conducted for the Springfield CVB reveal that Springfield's marketing program has been very effective. But, in today's crowded and competitive tourism landscape across The Ozarks, Brand and Marketing Awareness cannot be taken for granted. It is an ongoing process. Ideally, future ad and marketing campaigns of significant size would be vetted among target travelers beforehand to ensure that the marketing messages are appealing, memorable and capable of maximizing incremental visitation to Springfield.

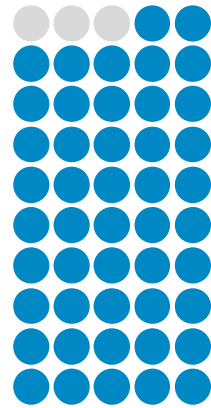
Springfield 2019 Brand Perception Research

Brand Awareness



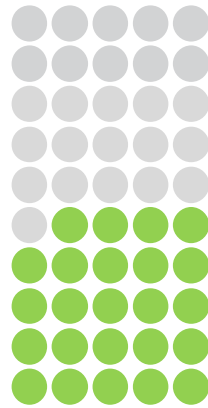
BRAND AWARENESS

KEY PERFORMANCE INDICATORS



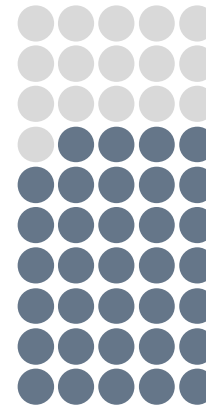
94%

of Travelers are familiar
with Springfield as a
leisure destination
(vs. 95% in 2016)



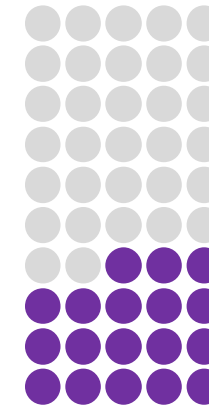
22%

of travelers have visited
Springfield, MO in the
past 2 years
(vs. 22% in 2016)



67%

Springfield's Raw
Market Potential is 67%
of the target market
(vs. 68% in 2016)

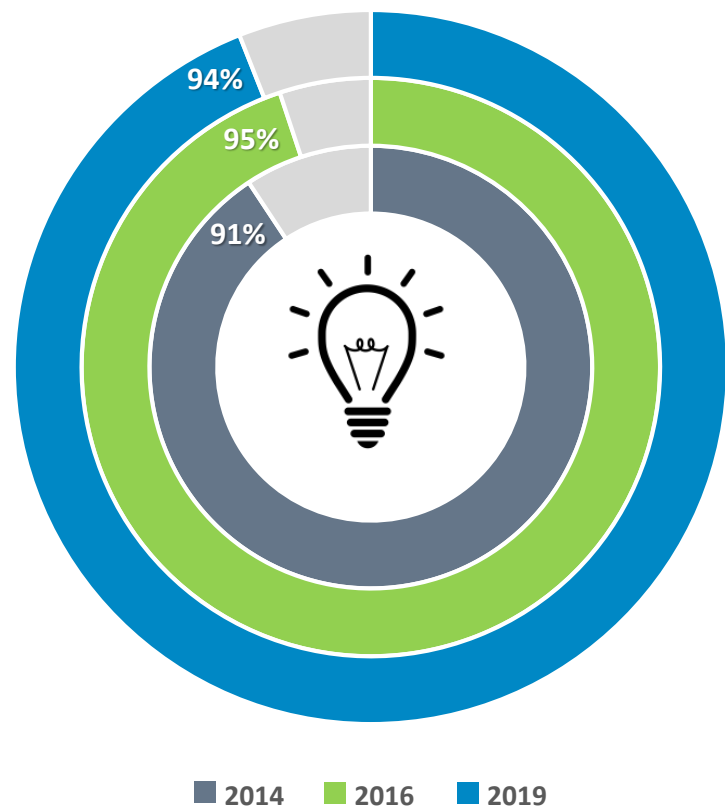


36%

of travelers have seen/heard
advertising for Springfield in
the past 6 months
(vs. 34% in 2016)

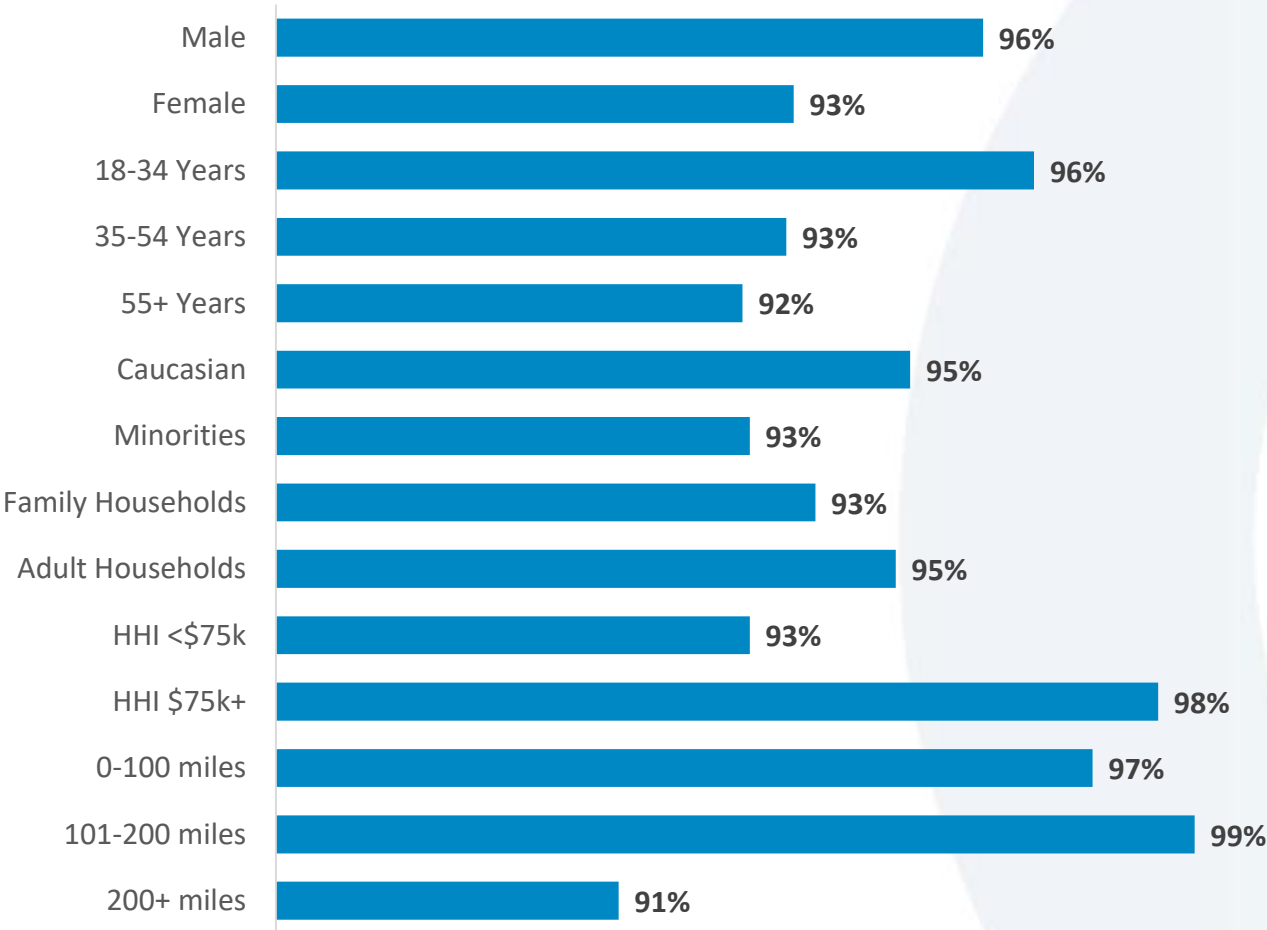
Aided brand awareness of Springfield remained strong at 94% in 2019, with awareness highest among those living closest and with higher incomes.

Awareness of Springfield, MO



Competitive Set Average: 87%
H2R Norm: 82%

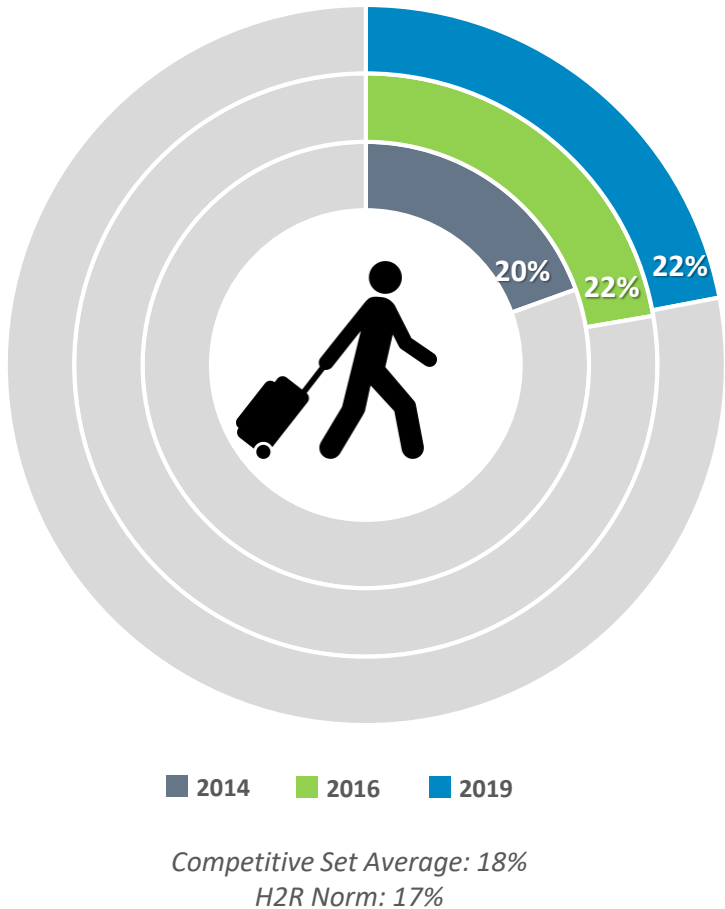
Awareness of Springfield by Consumer Segment



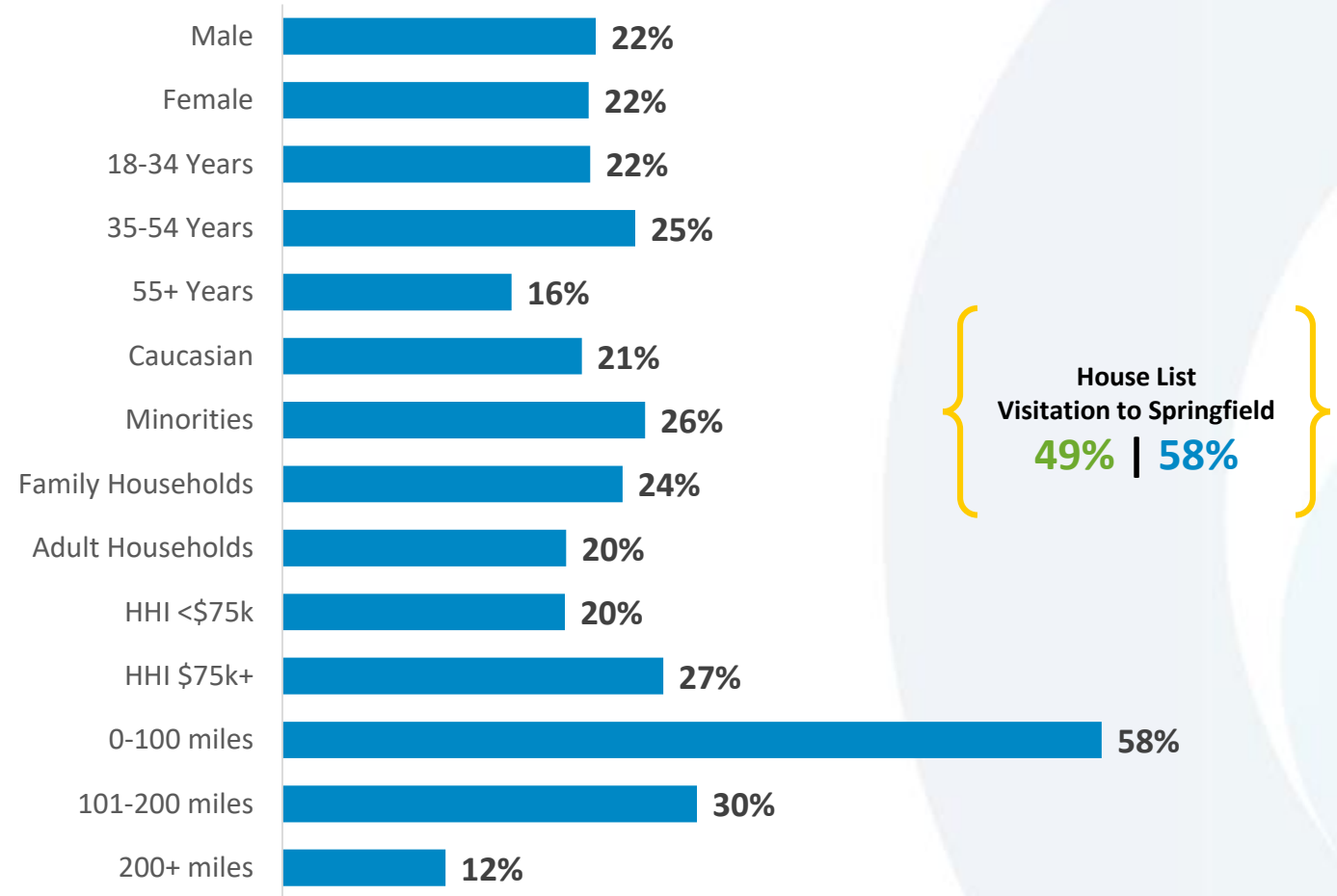
Q10: Please indicate your awareness and prior visitation of the following destinations.

Springfield's share of recent visitors remained on par with 2016's market share. And, Springfield supporters on the house list increased by 9 points.

Visited Springfield, MO in the Past 2 Years

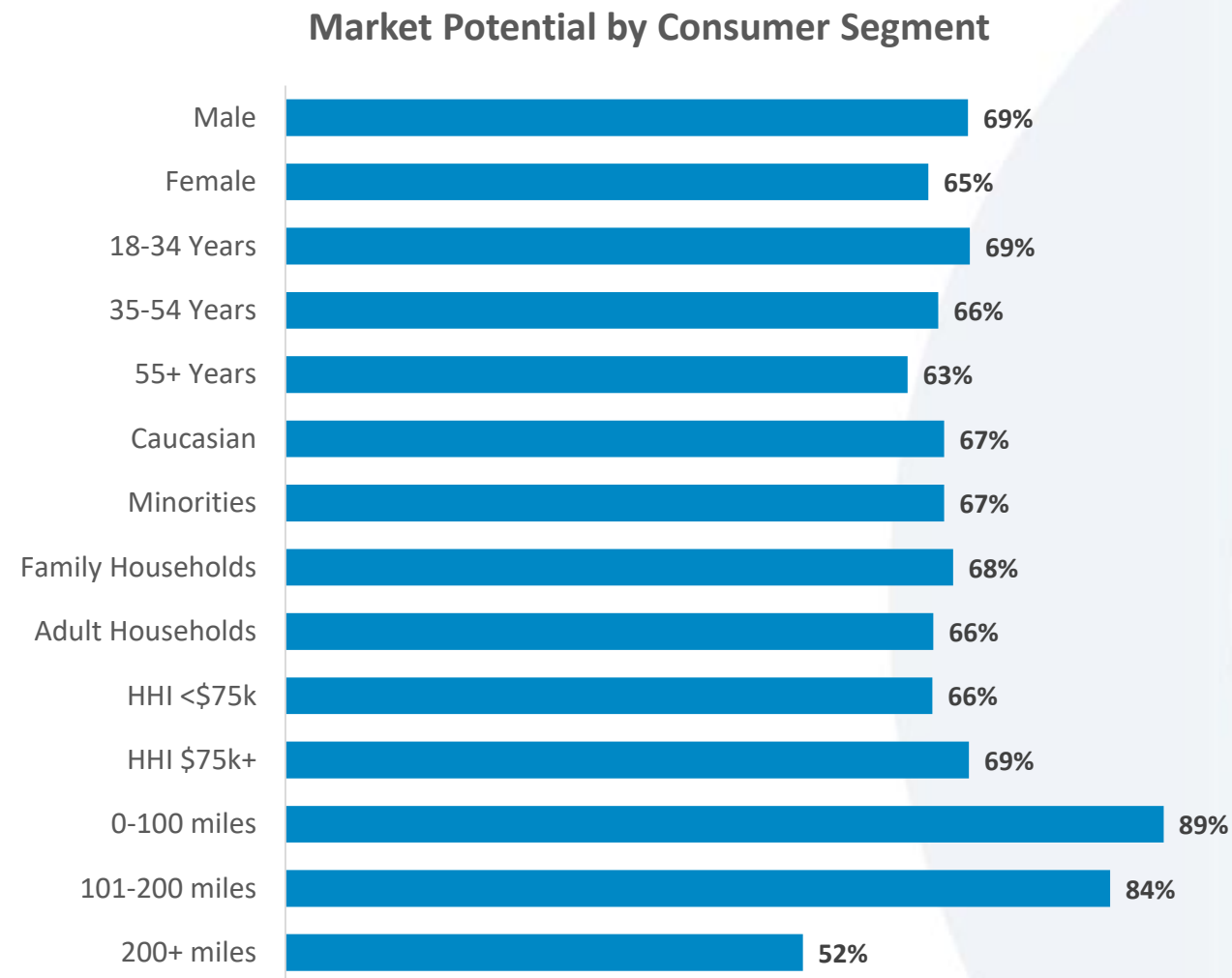
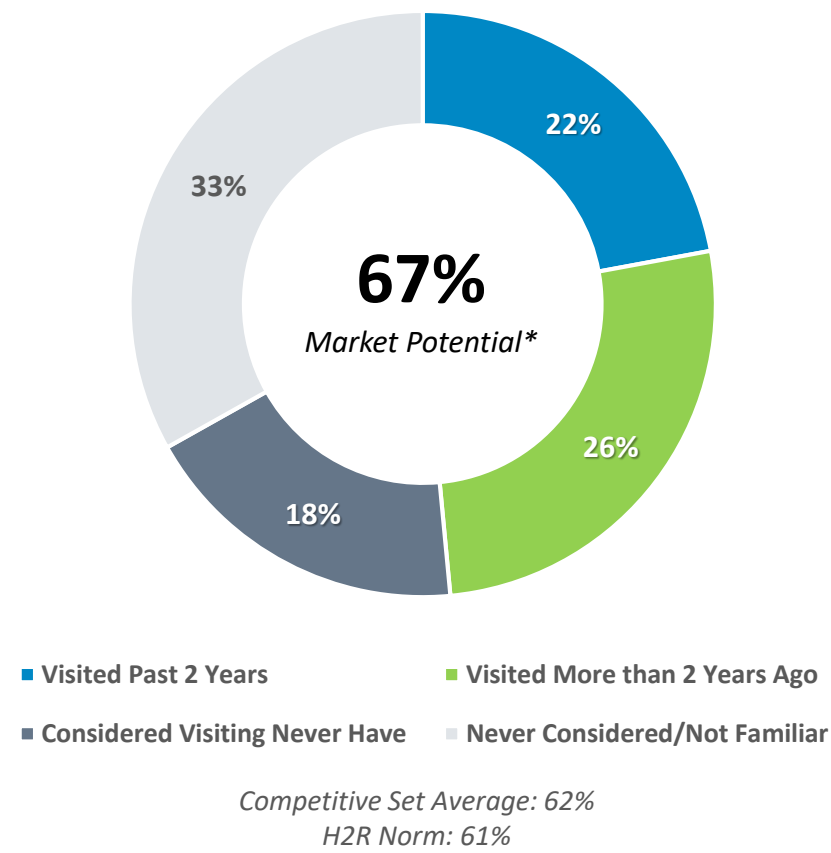


Visited Springfield by Consumer Segment



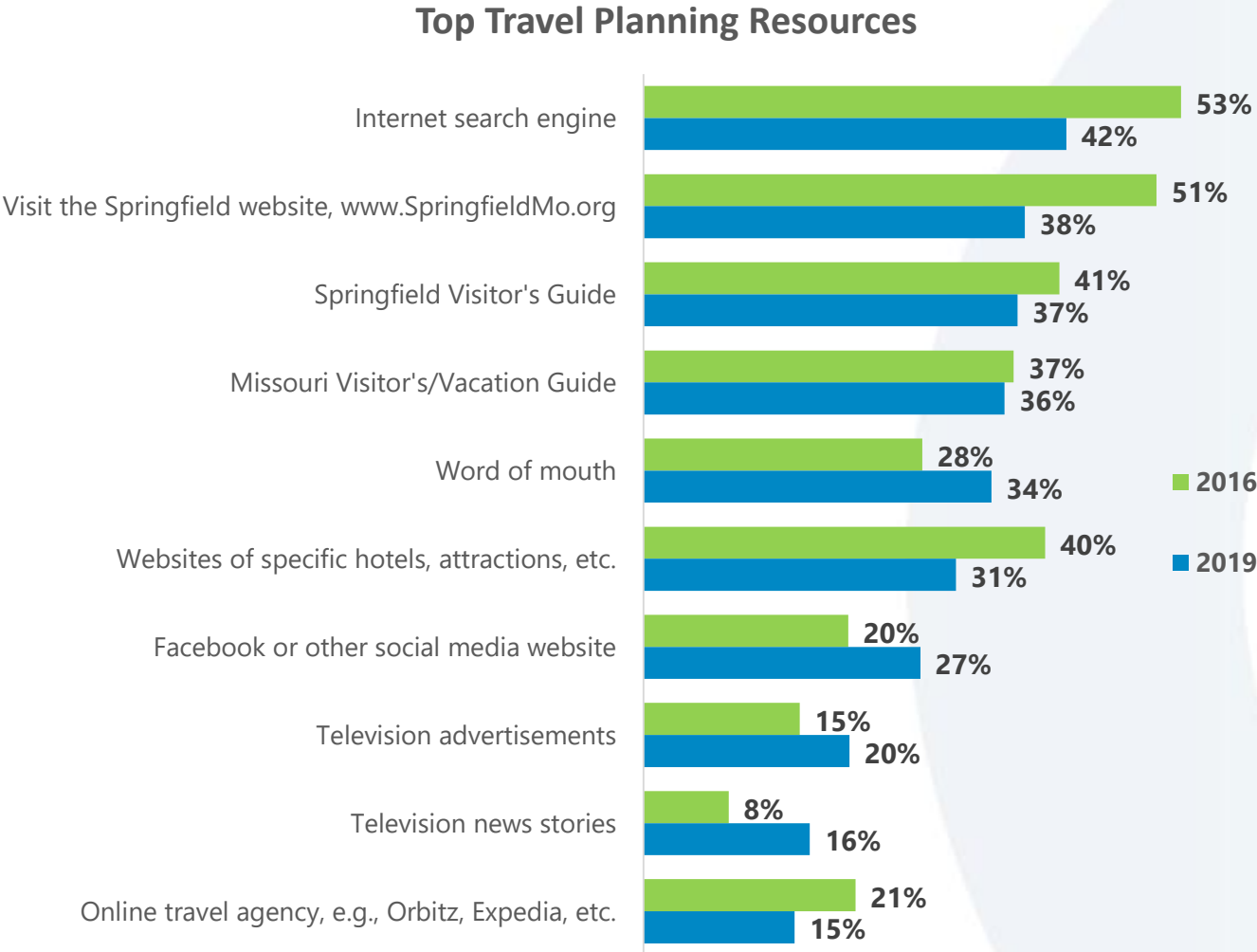
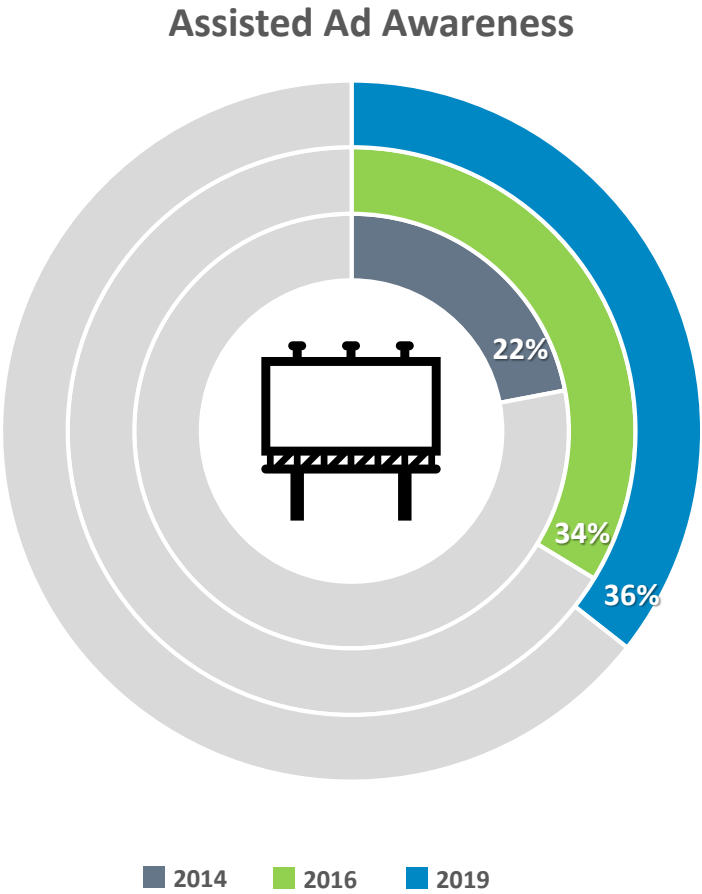
Q10: Please indicate your awareness and prior visitation of the following destinations.

Market Potential for Springfield remained strong at 67% (about the same as 2016) and is strongest among those living closest.



Q10: Please indicate your awareness and prior visitation of the following destinations.
*The methodology for Market Potential can be found in the Appendix of this report.

Springfield’s assisted ad awareness also remains strong, up 2 points from 2016. And, travelers are still most likely to use the internet to plan a visit to the area.



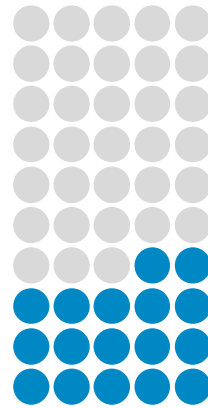
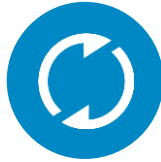
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Brand Equity



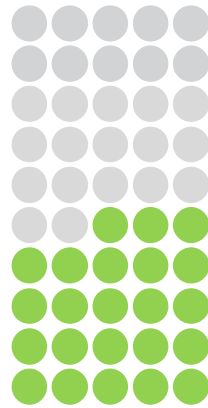
BRAND EQUITY

KEY PERFORMANCE INDICATORS



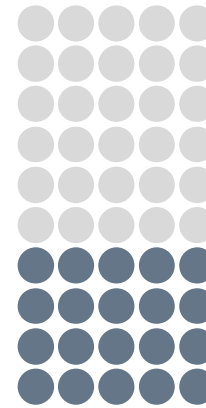
33%

of the Raw Market
Potential converted to
visitation in the past 2
years
(vs. 33% in 2016)



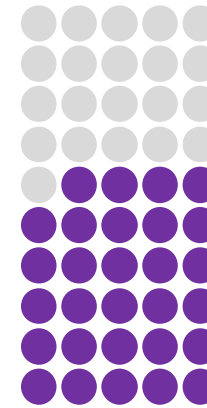
46%

of all visitors have
returned in the past 2
years
(vs. 43% in 2016)



40%

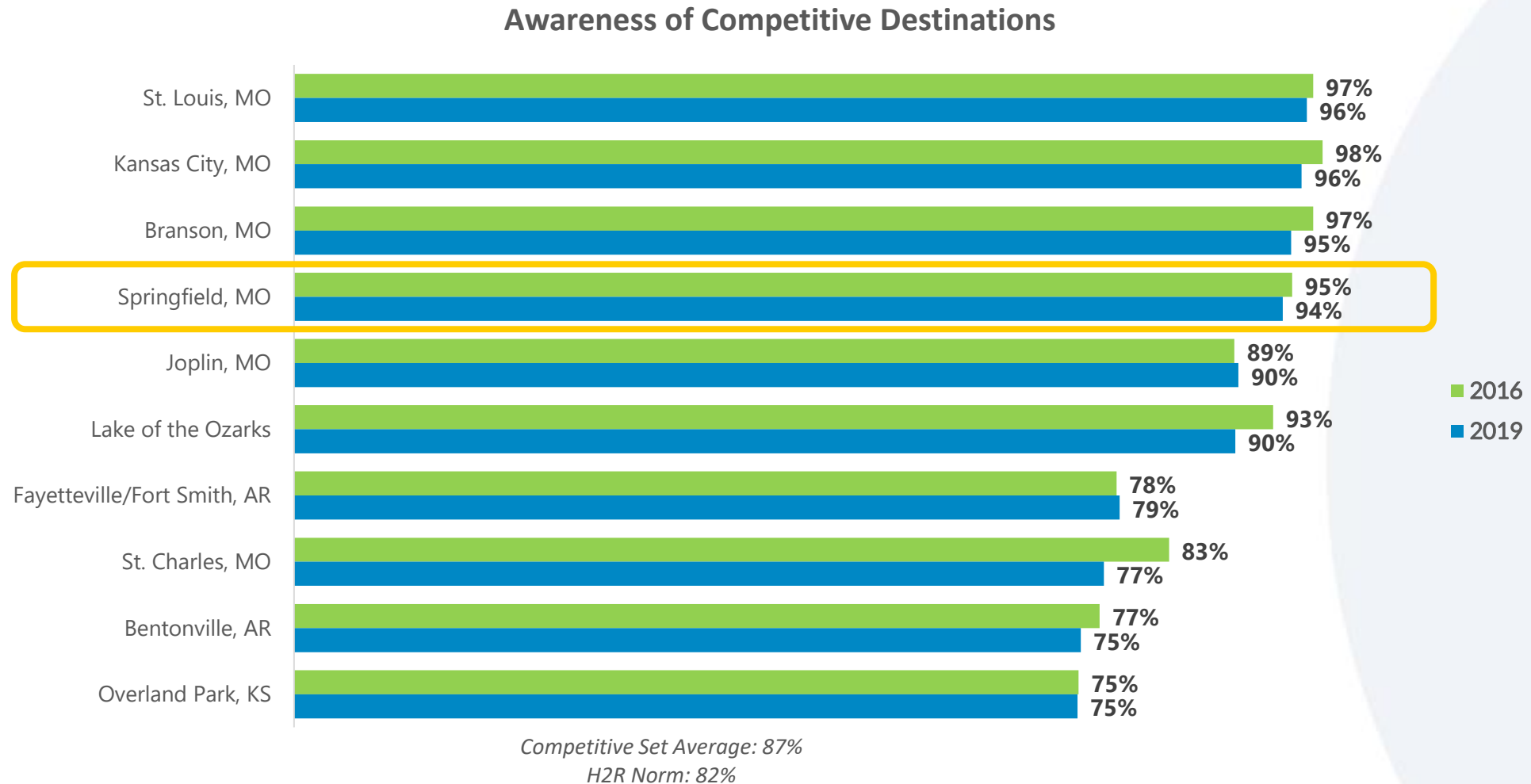
of travelers associate
Route 66 with
Springfield, MO
(vs. 42% in 2016)



58%

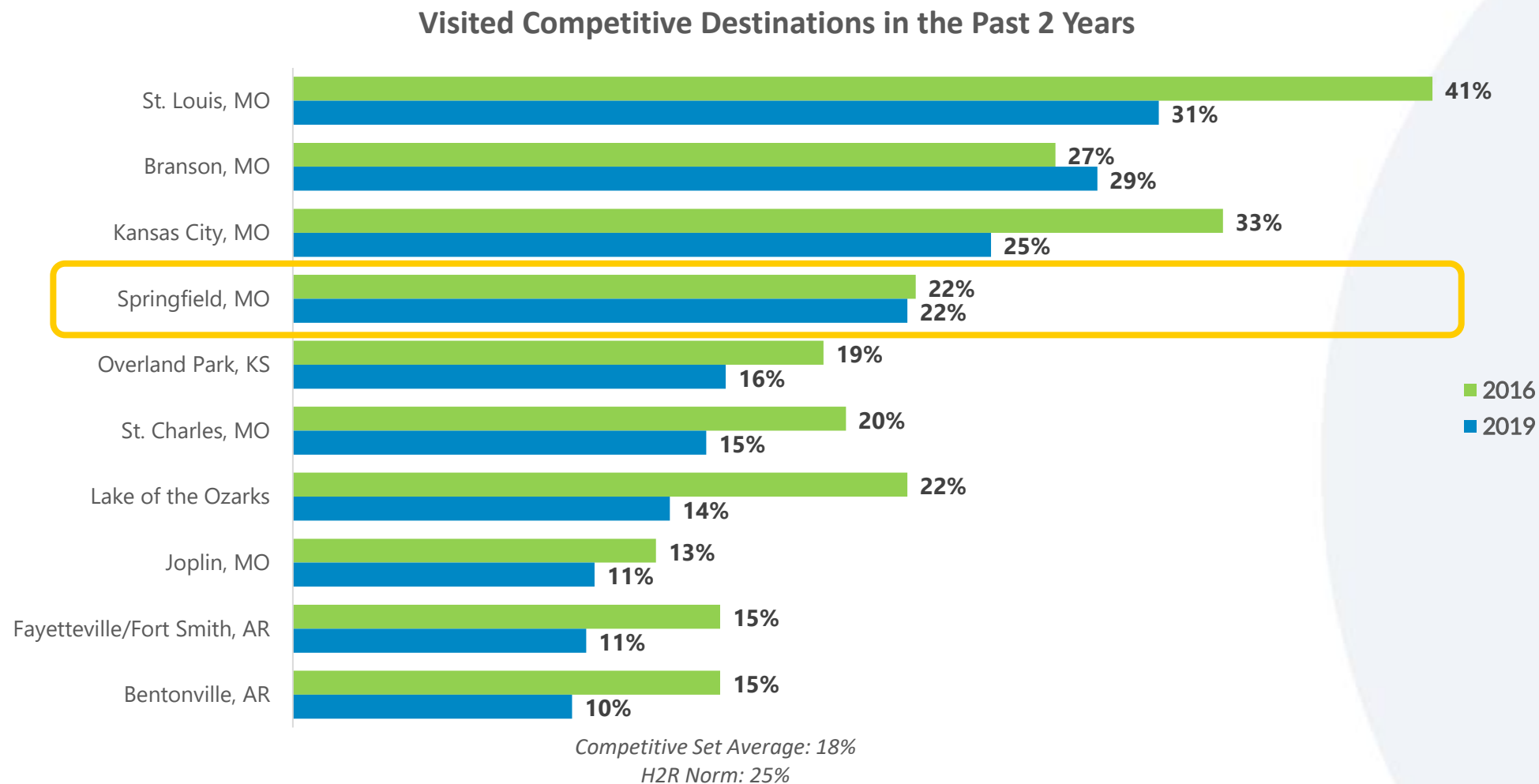
of visitors would
recommend the area to
friends/family
(vs. 64% in 2016)

Springfield ranks 4th in aided brand awareness among its competitive set with significantly higher awareness than average and the H2R Norm.



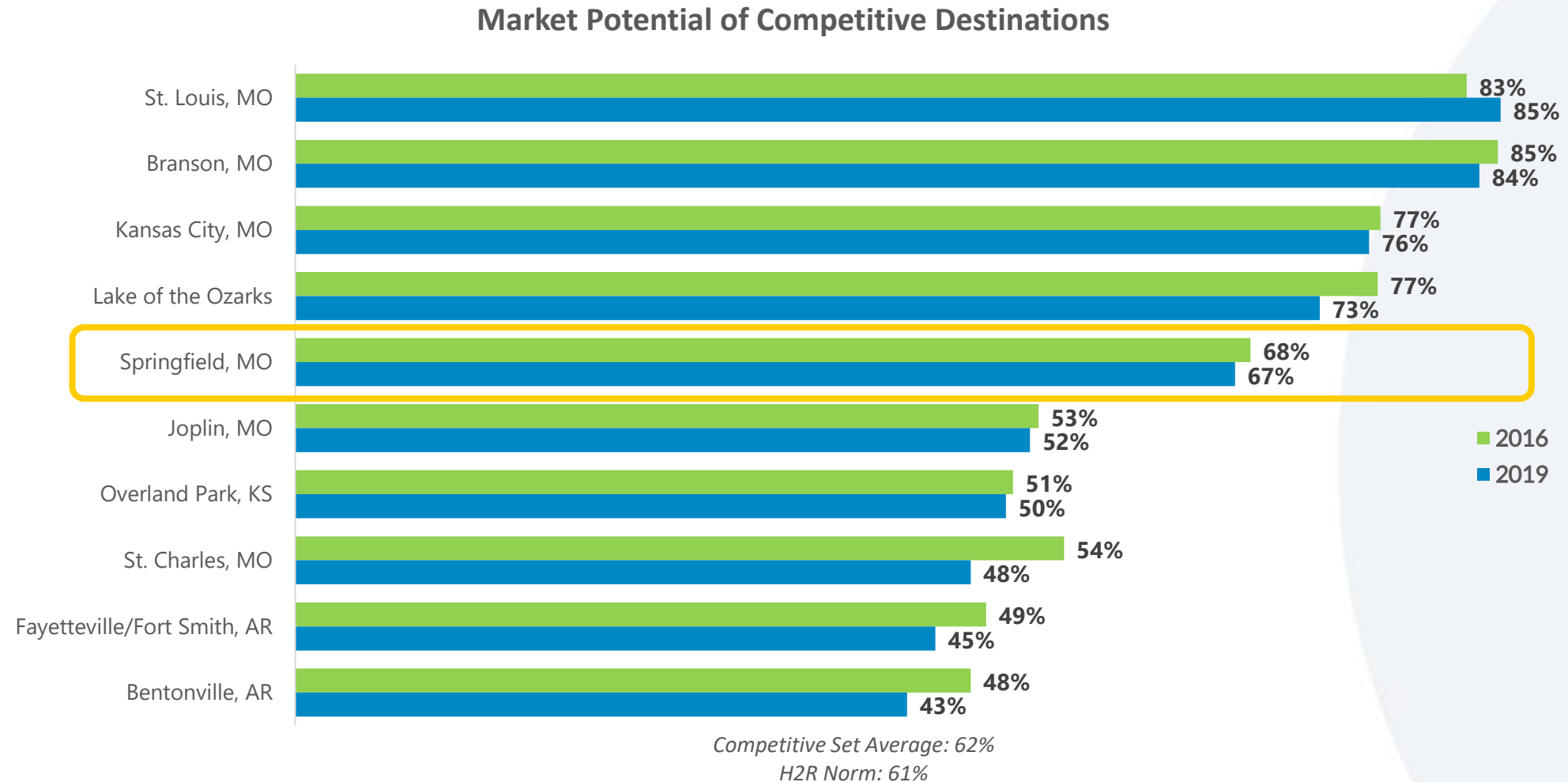
Q10: Please indicate your awareness and prior visitation of the following destinations.

Visitation to Springfield and Branson remained on par with past levels while all other destinations saw significant declines in market share.



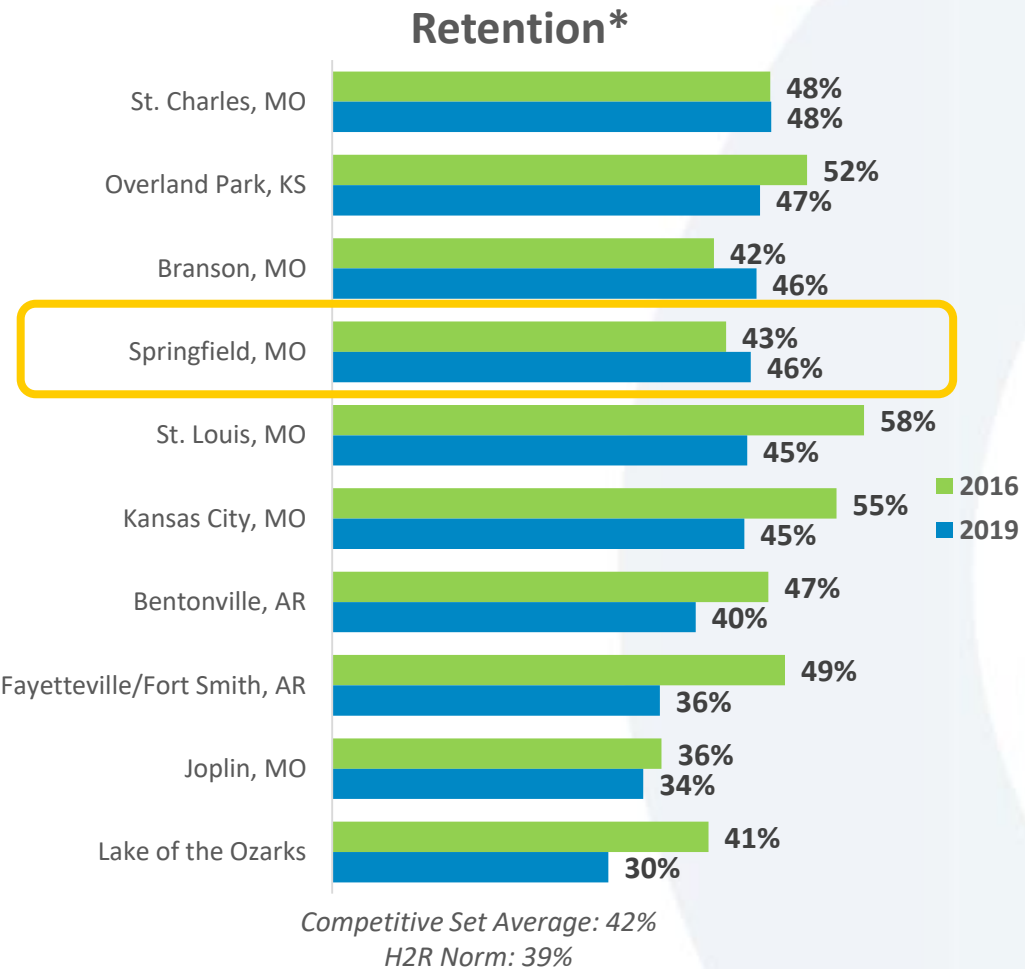
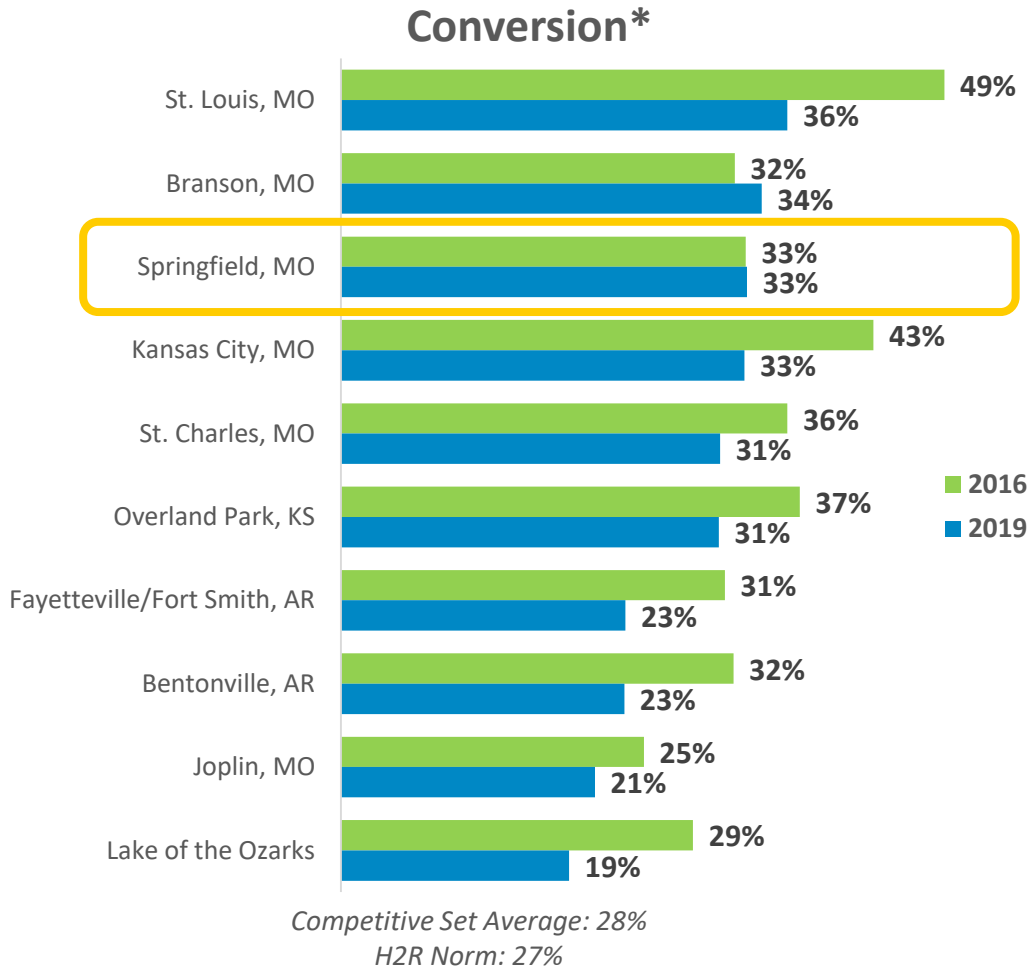
Q10: Please indicate your awareness and prior visitation of the following destinations.

Market Potential for Springfield remained strong at 67%, much higher than the competitive set average and the H2R Norm.



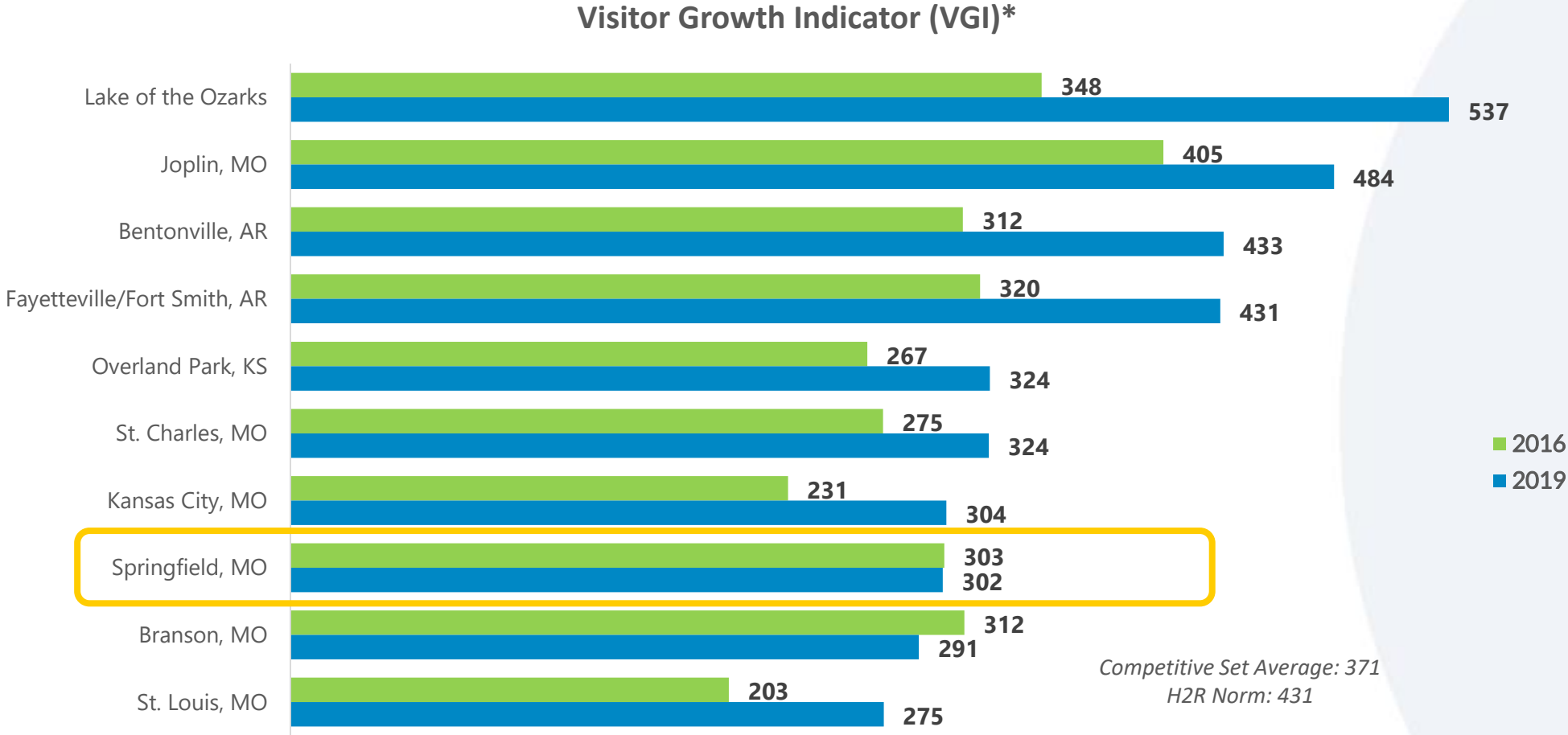
Q10: Please indicate your awareness and prior visitation of the following destinations.

Springfield continues to convert nearly one-third (33%) of its Market Potential with 46% retention of past visitors, both run above average for the comp set.



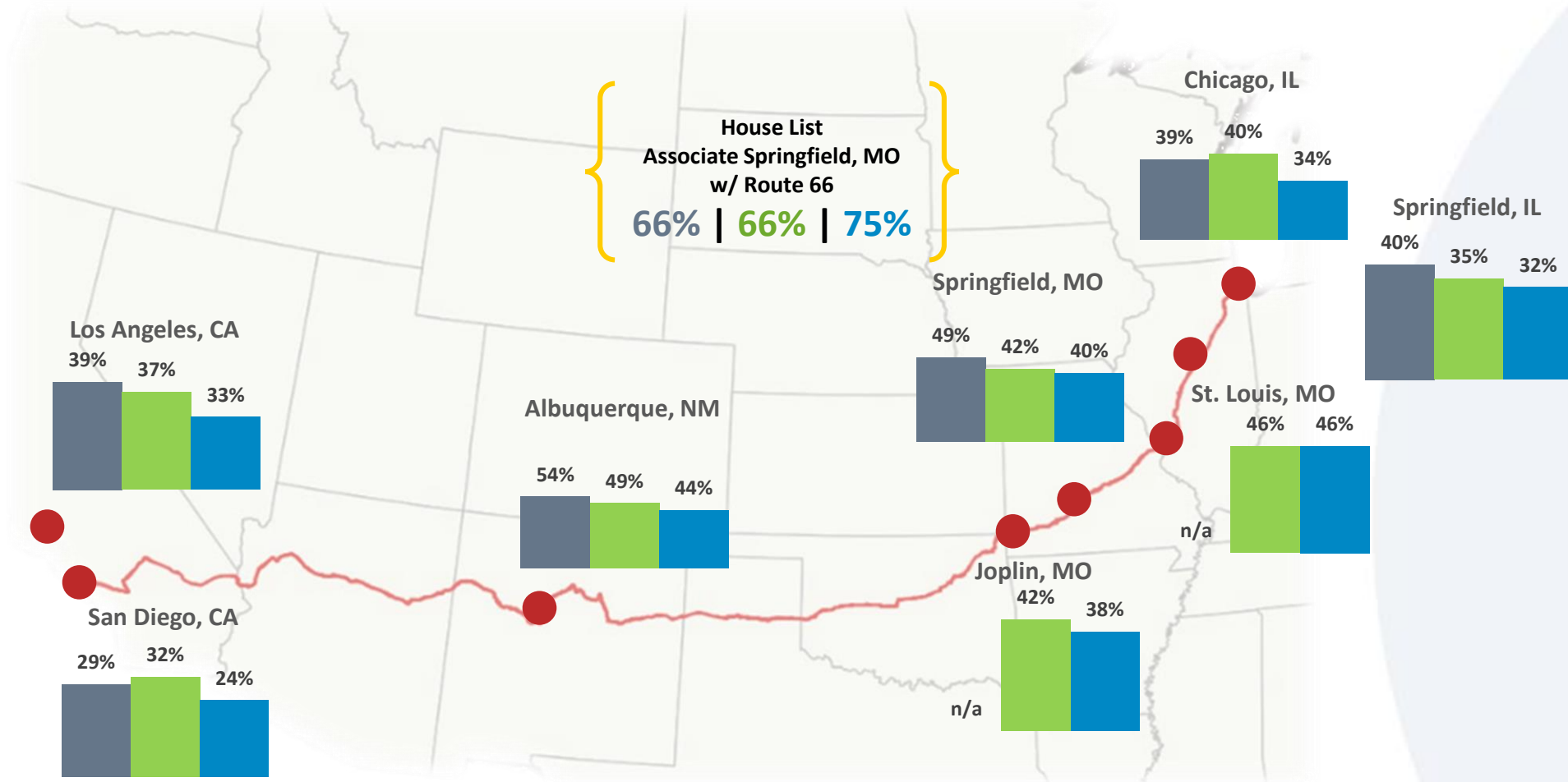
Q10: Please indicate your awareness and prior visitation of the following destinations.
*Conversion Rate = % Recent Visitors/Market Potential
*Retention = % Recent Visitors / % Visitors Ever

The Visitor Growth Indicator (VGI) is a measure of how much Market Potential remains on the table. Springfield has exhausted much of their potential; and, therefore, has a lower VGI for future growth than other destinations in the competitive set.



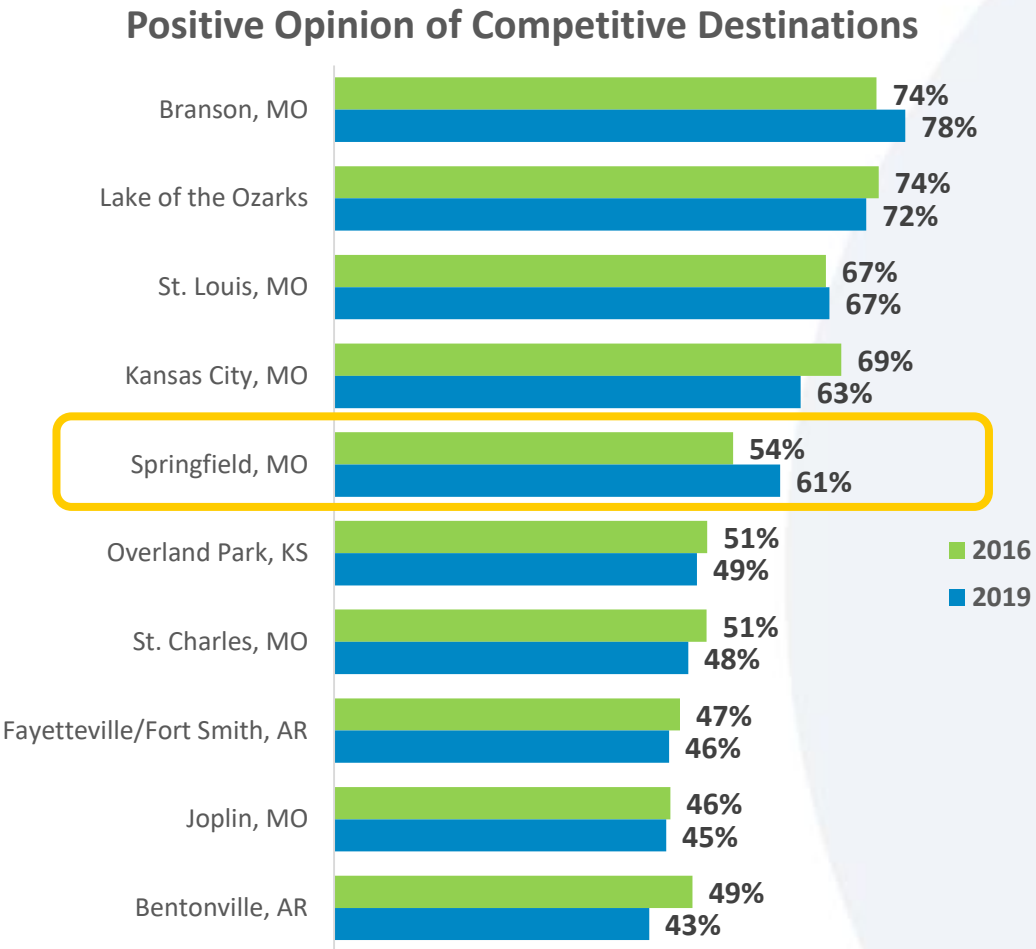
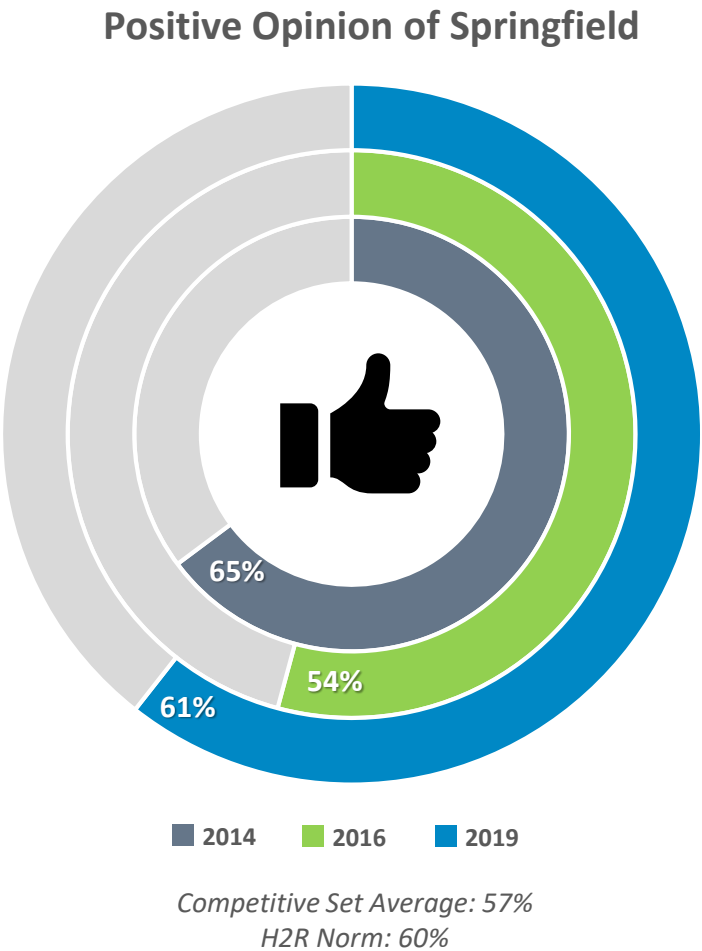
Q10: Please indicate your awareness and prior visitation of the following destinations.
*VGI = Market Potential / % Recent Visitors * 100

Four in ten travelers continue to somewhat/strongly associate Springfield, MO with Route 66, ranking third behind St. Louis and Albuquerque.



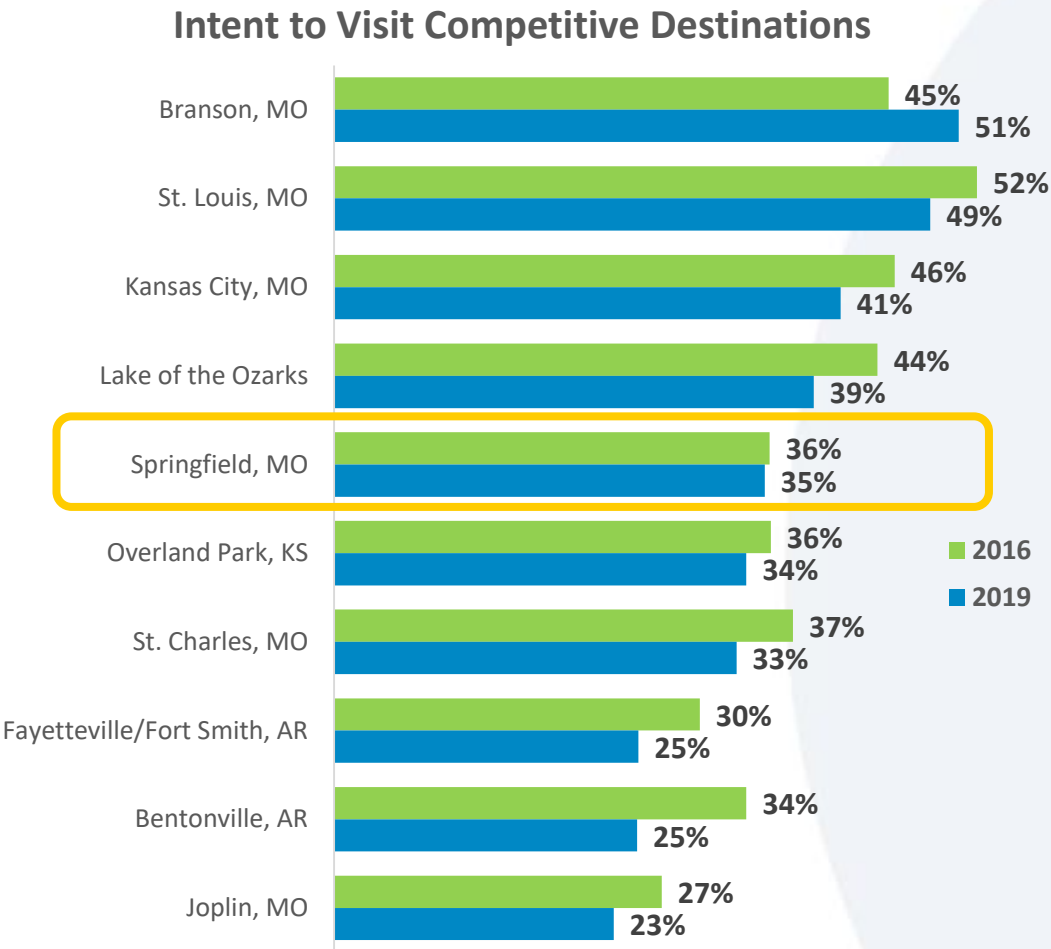
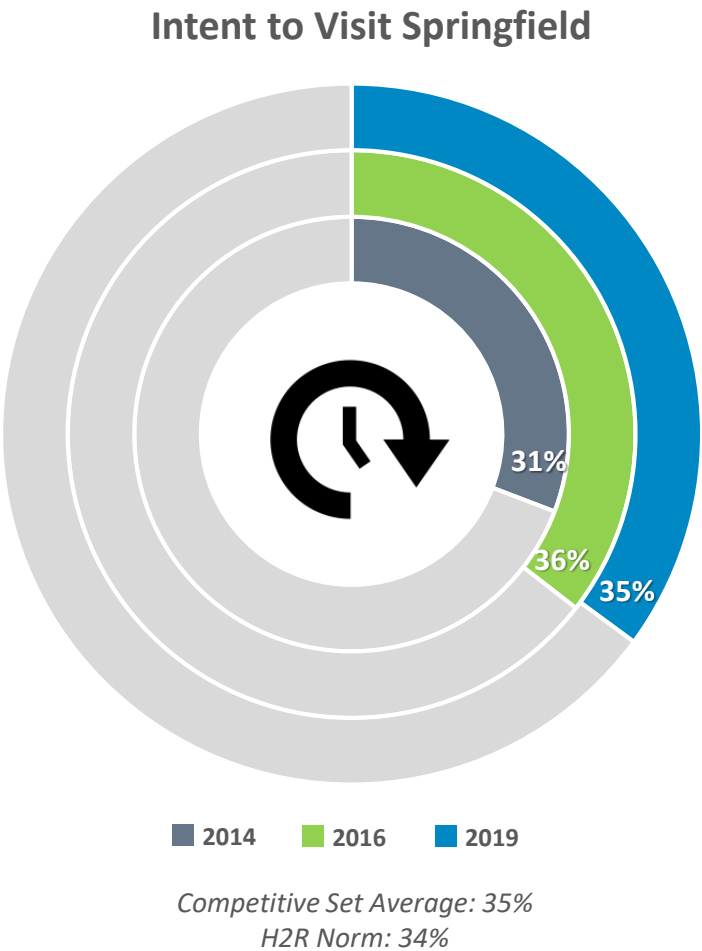
Q11: Please rate the degree to which you associate each of the following cities with the legendary U.S. highway Route 66.

Favorable opinions of Springfield increased significantly this year after taking a dip in 2016. And, this was the only significant increase among opinions across the competitive set.



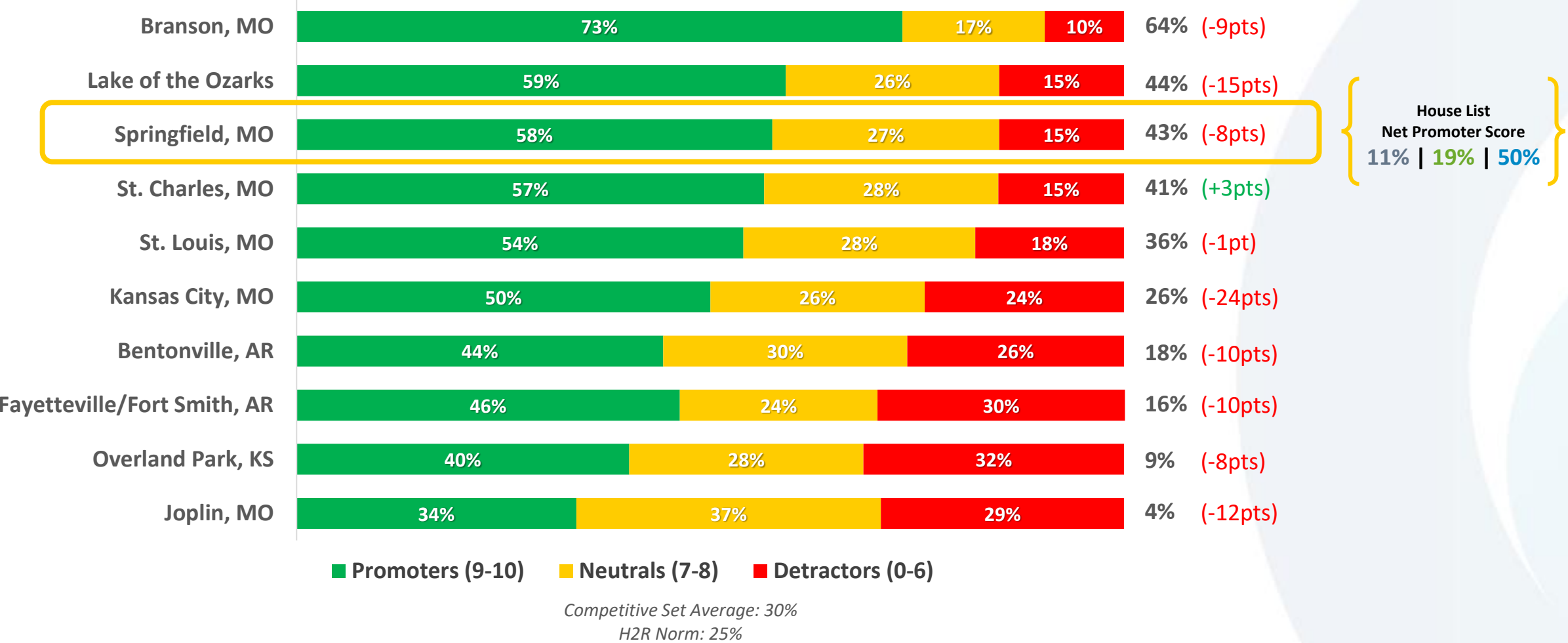
Q12: Please indicate to what degree your opinion of these destinations is positive or negative.

Intent to visit Springfield remains on par with the H2R Norm, the competitive set’s average and with 2016. Nearly one-third of travelers indicated they intend to visit Springfield in the next 12 months.



Q13: Please indicate how likely you are to visit each of the following destinations in the next 12 months.

Springfield earned a Net Promoter Score of 43% ranking third among the comp set. And, among Springfield’s biggest supporters on the house list, NPS improved significantly (50% vs 19% in 2016).



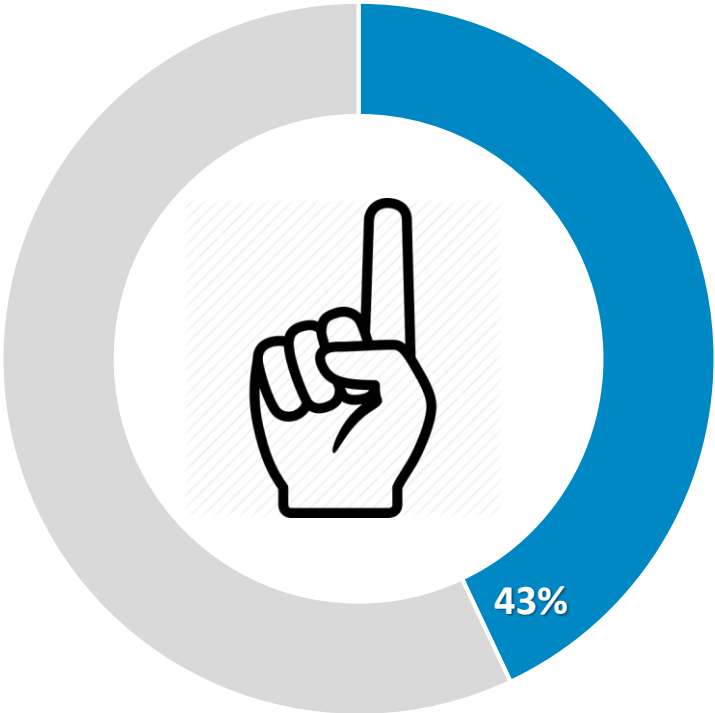
Springfield 2019 Brand Perception Research

Brand Personality

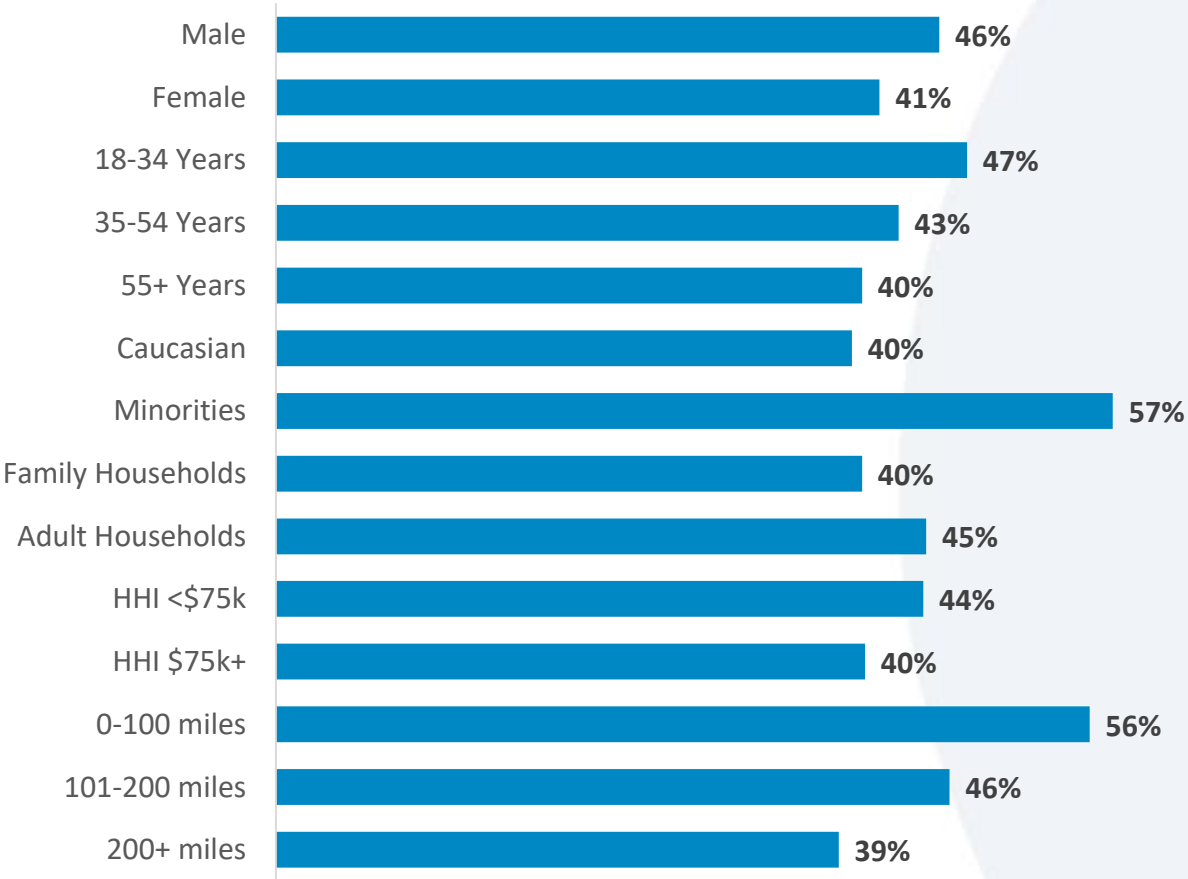


More than 4 in 10 travelers would put Springfield at the top of their destination consideration set. Interestingly, Minorities and those living closest say they are most likely to make Springfield their first choice.

% Probably/Definitely Would Consider Visiting Springfield, MO First

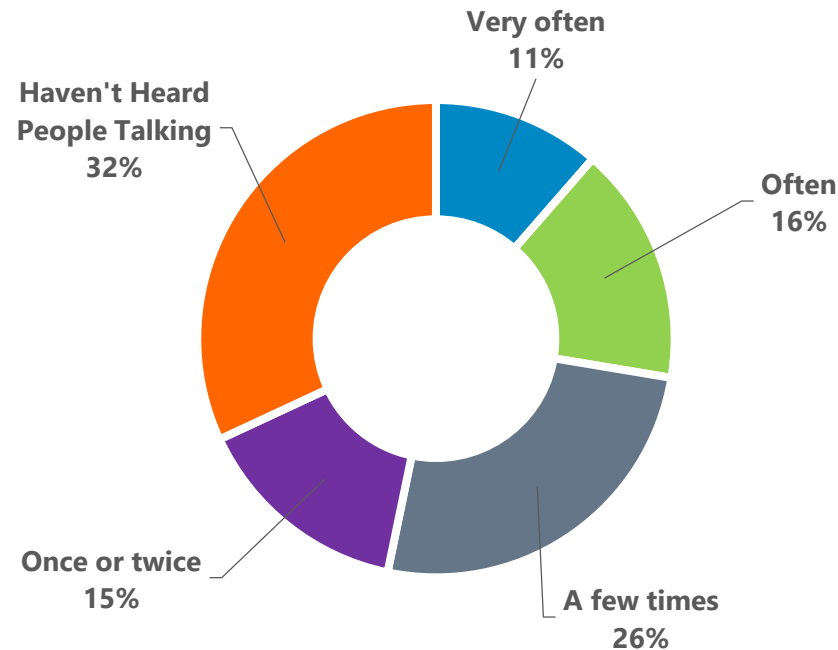


First Consideration by Consumer Segment

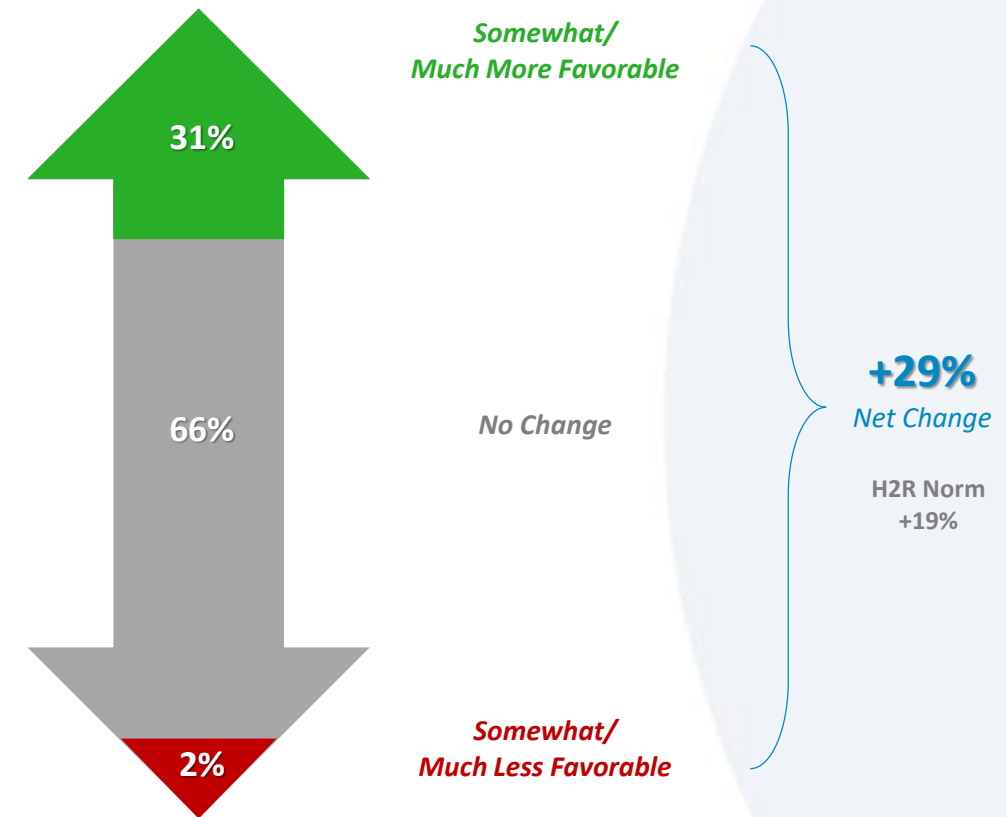


More than two-thirds of travelers have heard people talking about Springfield in the past 6 months, and over that same time frame the opinion of the area has become much more positive.

How Often Hear People Talk About Springfield, MO



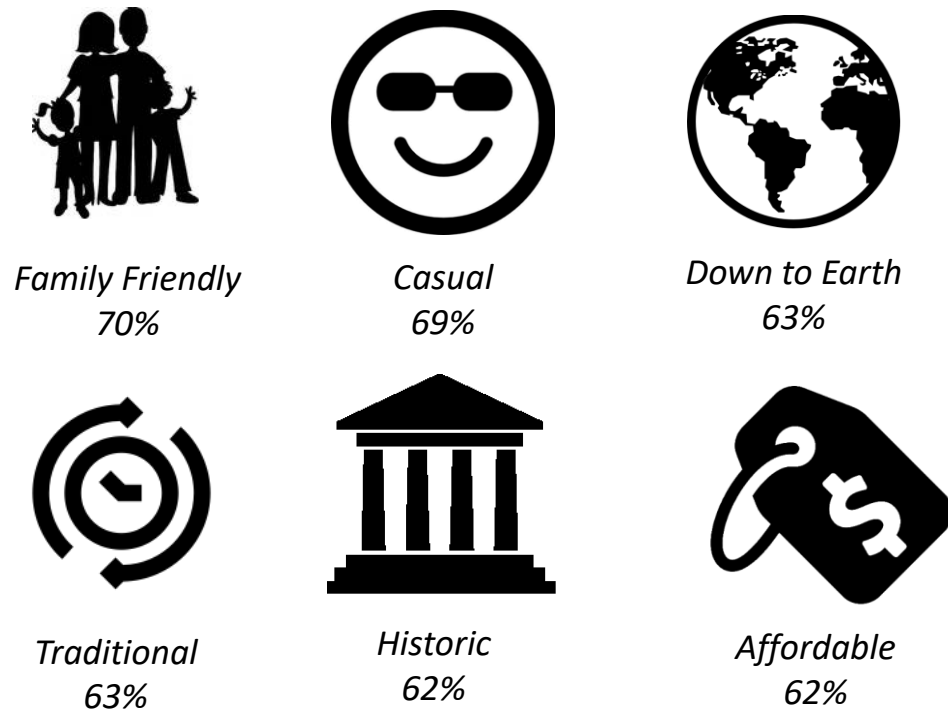
Change in Perception of Springfield, MO Over Past Six Months



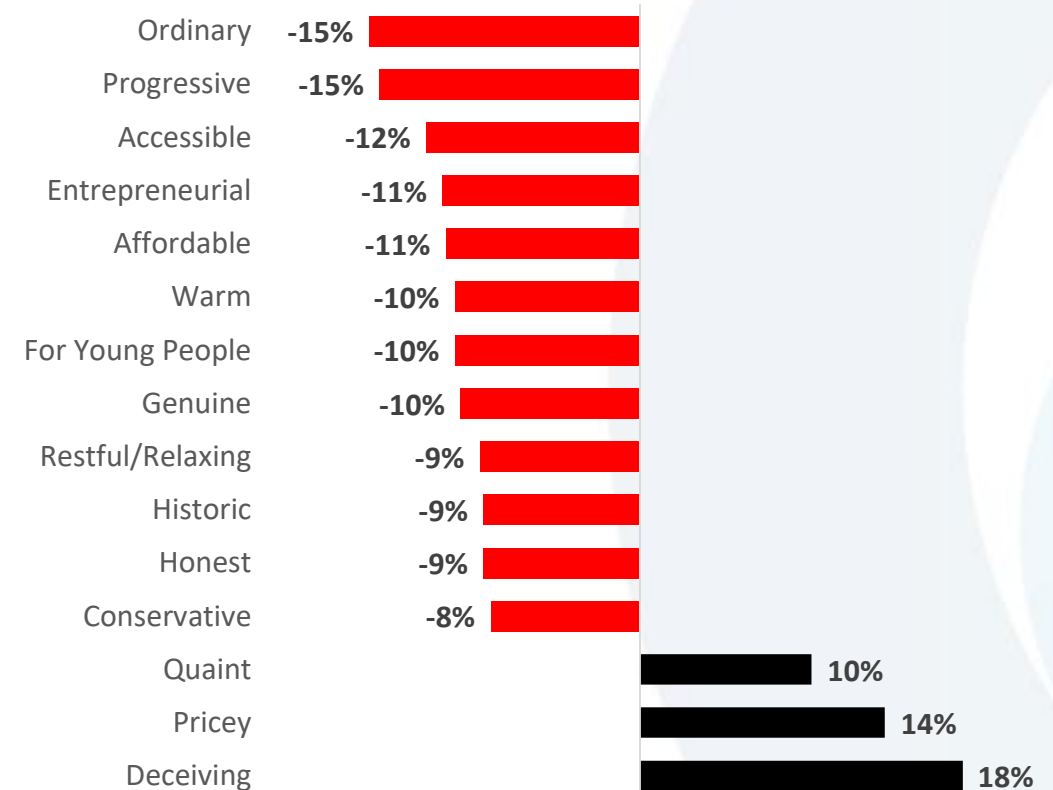
Q17: In the past 6 months, how often have you heard people talking about Springfield, MO?
Q18: How has your perception of Springfield, MO changed in the past 6 months?

Travelers continue to perceive Springfield as being family friendly, casual and down to earth. However, other characteristics experienced some comparatively strong shifts this year, e.g. declines in ordinary, progressive and accessible and increases in deceiving and pricey.

Top Characteristics 2019



Most Significant Changes from 2016

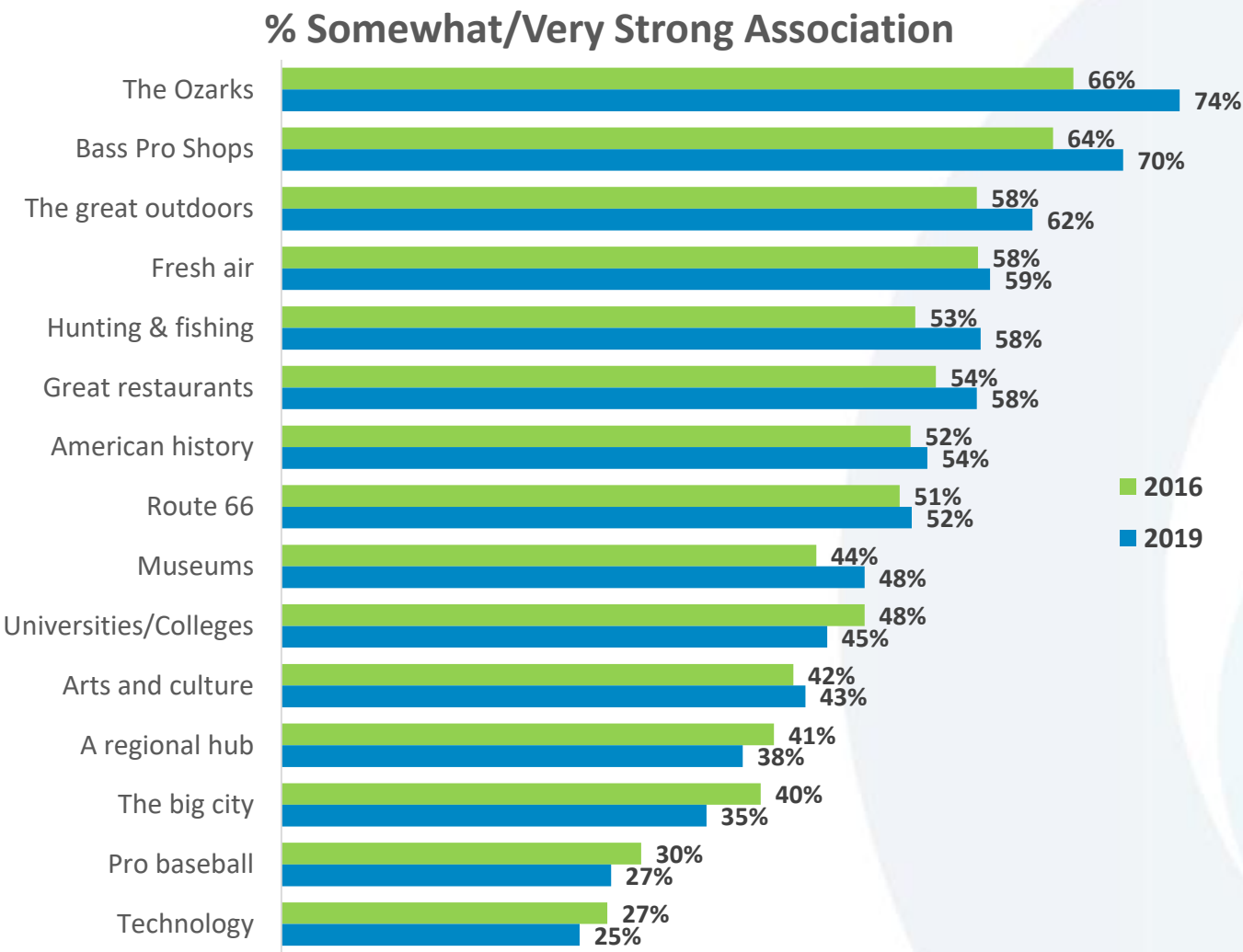


Q20: Please rate the degree to which you associate the following adjectives with Springfield, Missouri as a travel destination.

Activities Associated w/ Springfield, MO

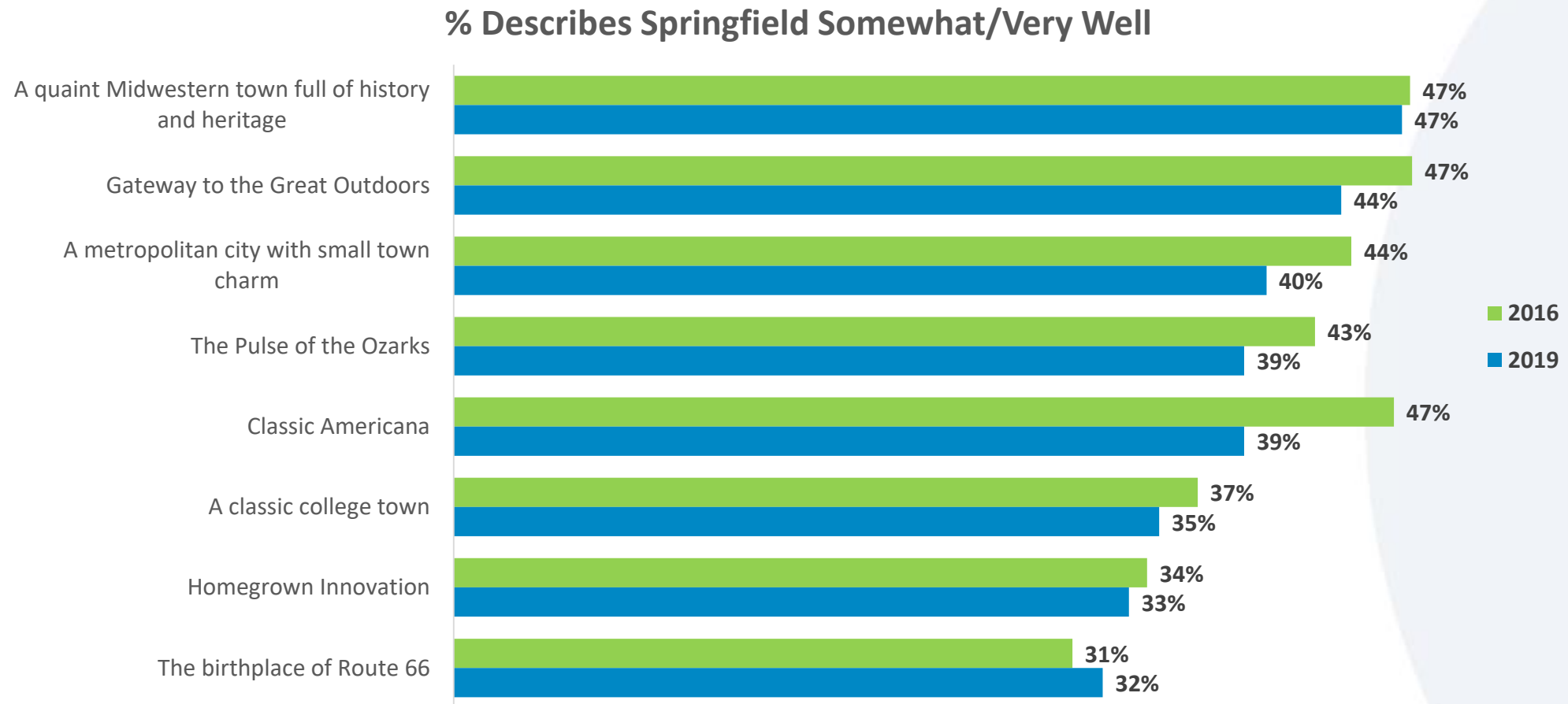
Travelers’ associations with The Ozarks, Bass Pro and The great outdoors gained even more ground since 2016.

While these attributes saw significant increases, other saw declines. Springfield is less seen as a university/college town (-3pts), a “big city” (-5pts), and is not well known for technology (-2pts) or pro baseball (-3pts).



Q33: Please rate the following activities/attributes on the degree to which you associate each with Springfield, MO.

Springfield is also well known as a Midwestern town full of history and heritage. Far fewer, however, associate Springfield as being the gateway to the great outdoors or classic Americana as in the past.



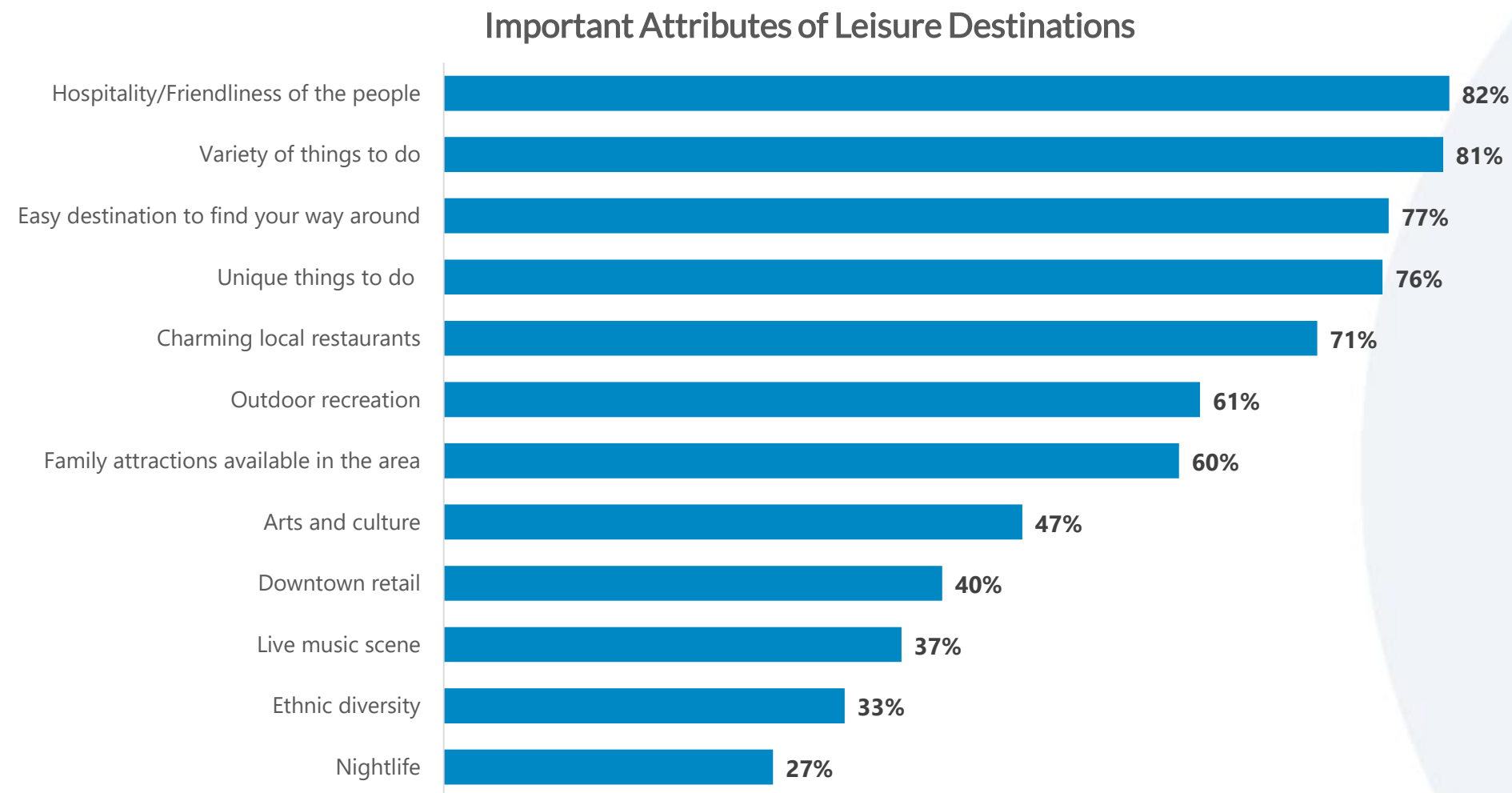
Q35: Based on your current perception of Springfield, MO, please rate the following statements on the degree to which you feel each describes the city.

Springfield 2019 Brand Perception Research

Brand Positioning

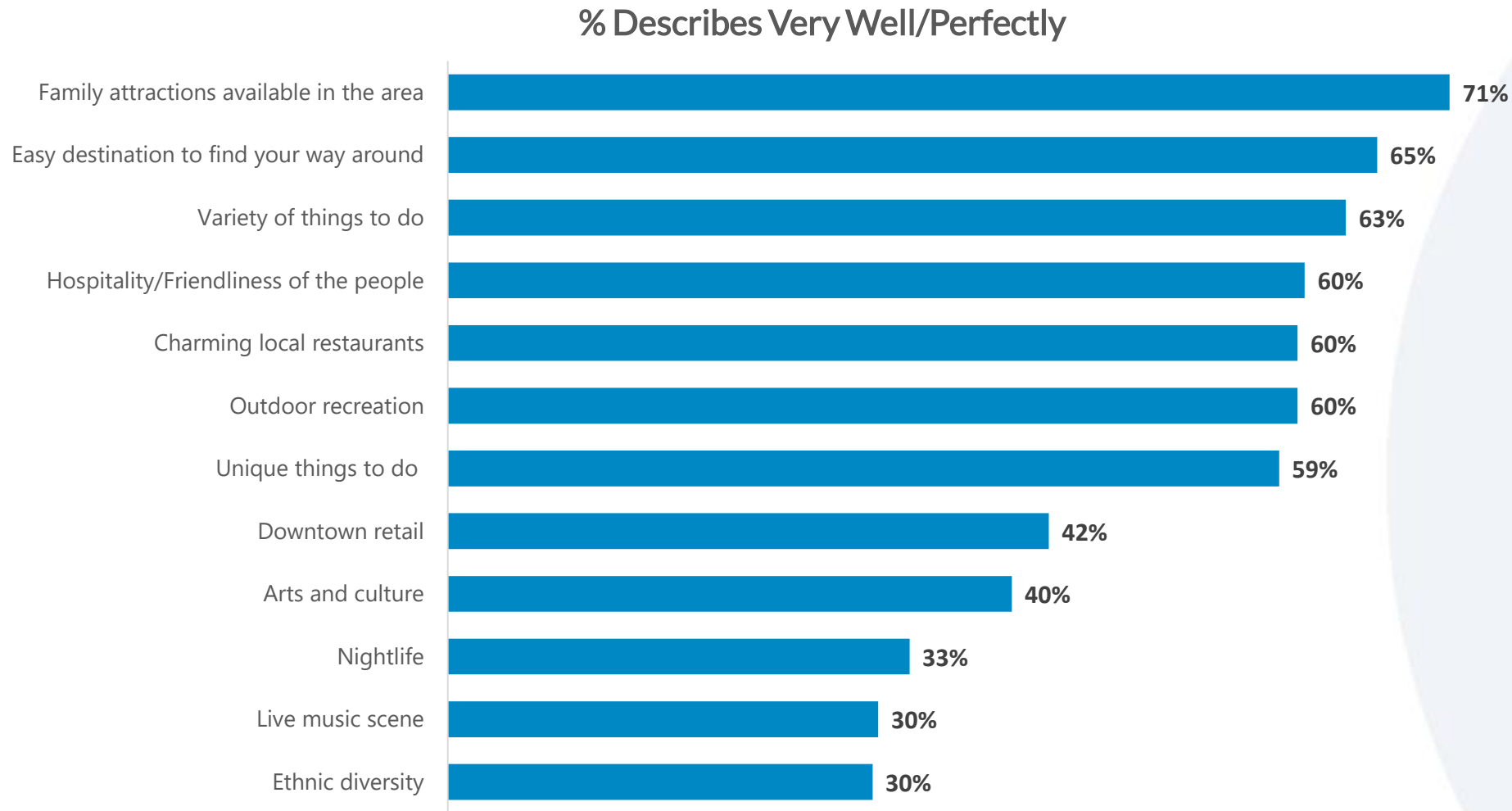


Travelers say they are seeking leisure destinations that are friendly with a variety of things to do.



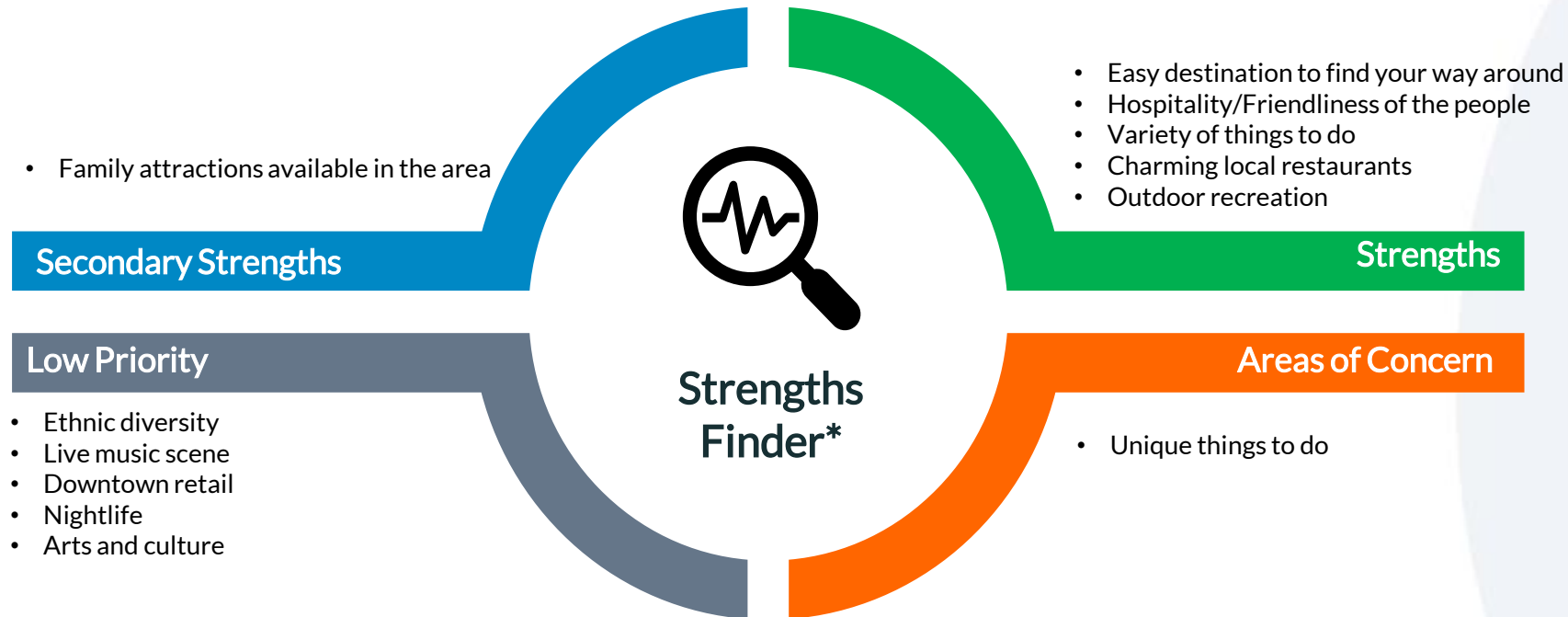
Q7: Please indicate how desirable you find each of the following attributes or characteristics when thinking about overnight or weekend getaways you might consider visiting.

Springfield visitors are most satisfied with the family attractions available in the area. However, satisfaction in general dropped from 63% overall to 51% overall.



Q21: Please rate how well you believe the following attributes describe Springfield, MO.

Springfield's strengths continue to be its variety of things to do, easiness to navigate and friendly people. However, the same area of concern remains—not enough unique things to do.



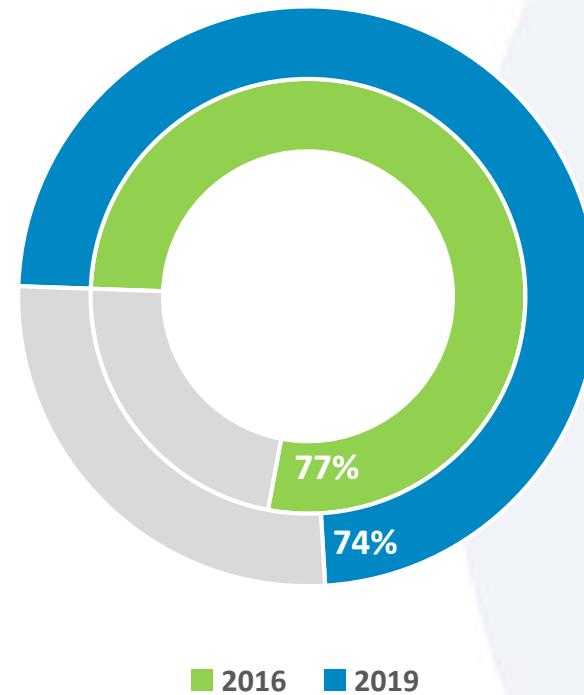
Q21: Please rate how well you believe the following attributes describe Springfield, MO.

*The methodology for Strengths Finder can be found in the Appendix of this report.

Nearly three-quarters of visitors continue to feel that Springfield delivers on their brand promise, on par with 2016.

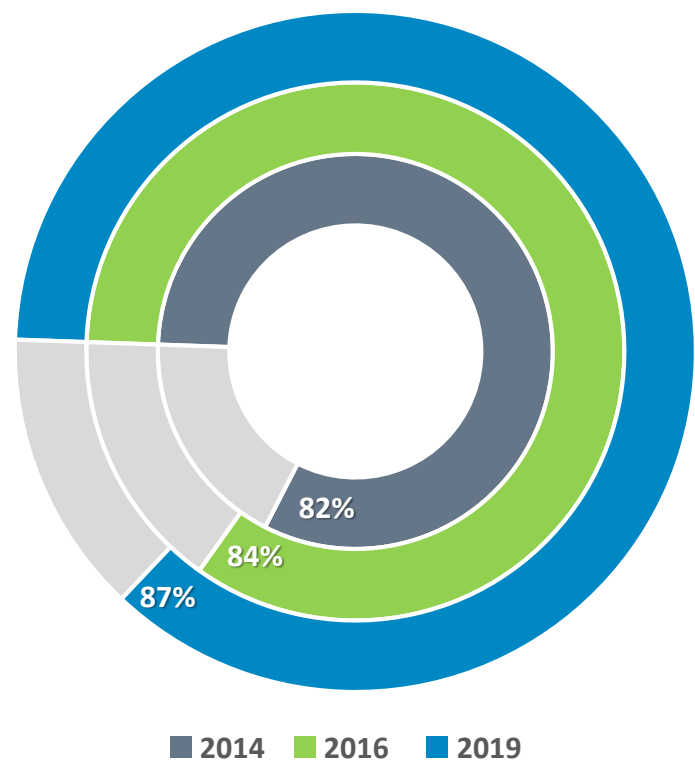
As the heart and soul of the Ozarks, our true nature is to help people celebrate friends, family and all of life's simple pleasures.

Brand Promise Delivery
% Somewhat/Strongly Agree

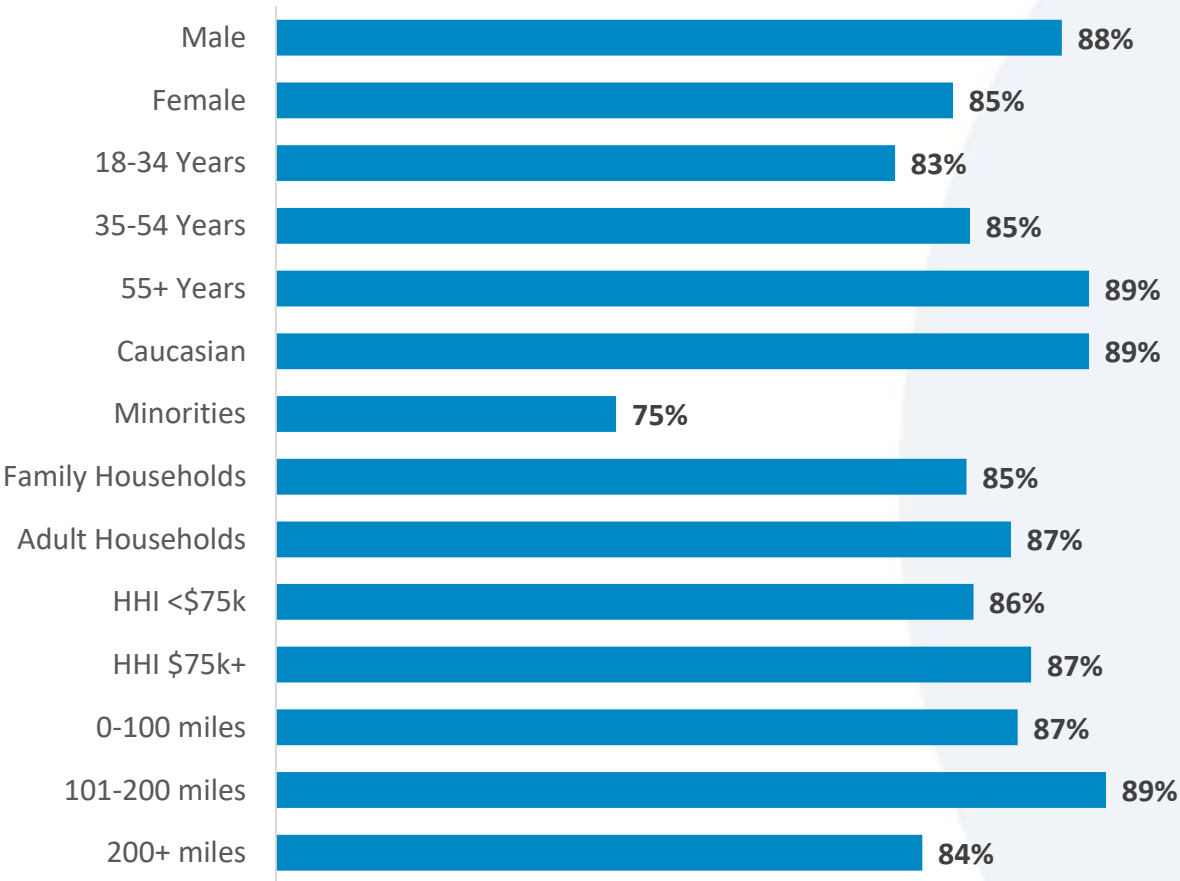


The attitude toward “The Ozarks” continues to grow more positive each year. And, those living closest and over the age of 55 have the most favorable opinions of the area.

% Somewhat/Very Positive Attitude
Toward The Ozarks



Attitude Toward The Ozarks by Consumer Segment



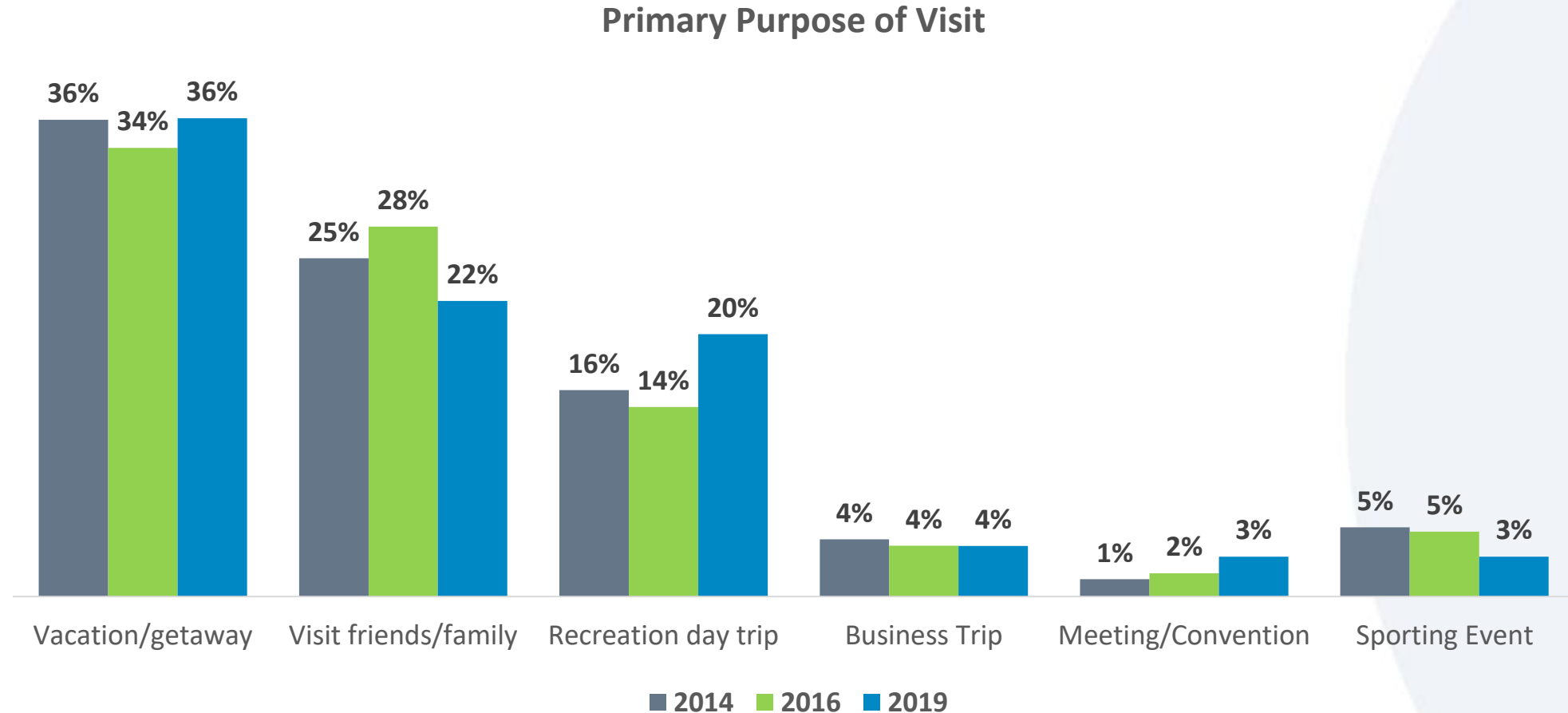
Q34: Using the scale provided, please tell us which of the following best describes your attitude toward "The Ozarks."

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Visitors & Non-Visitors



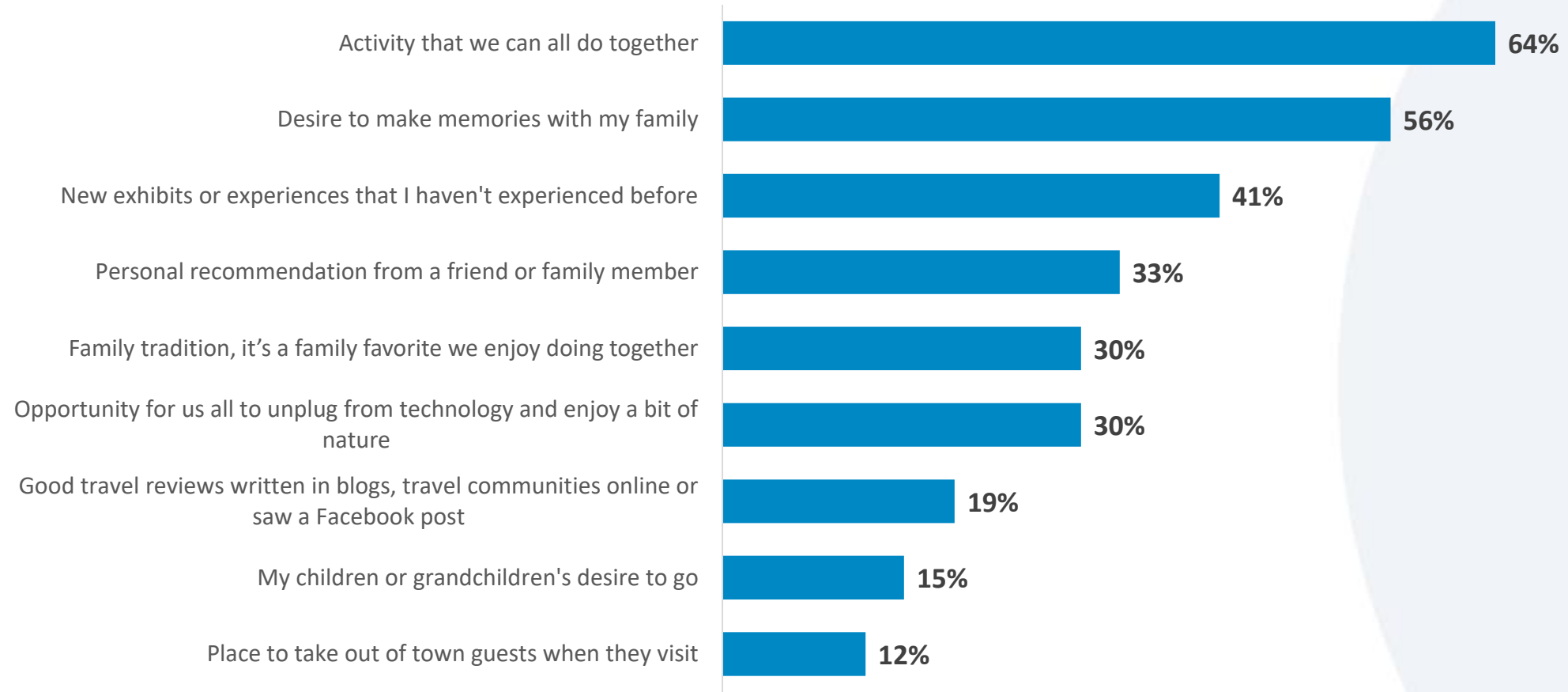
Vacation/getaways are still the most popular type of trip to make to Springfield; although, recreational daytrips increased by 6 points this year.



Q24: What was the primary purpose of your trip to Springfield, MO the last time you visited?

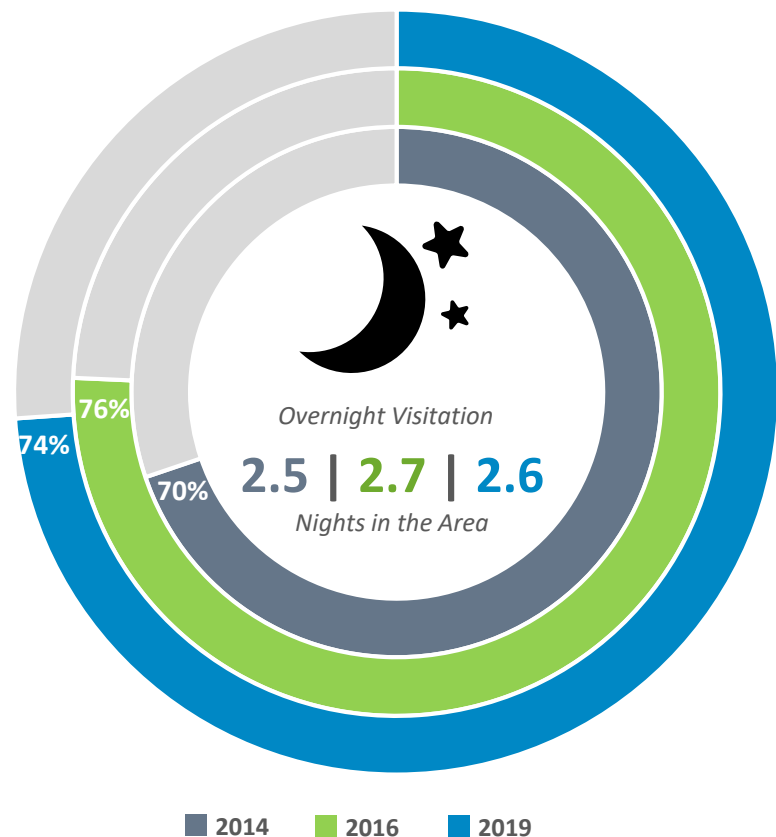
Springfield's biggest emotional drivers continue to be “togetherness” and the “desire to make memories”—the same top emotional drivers since 2014.

Emotional Drivers of Visitation

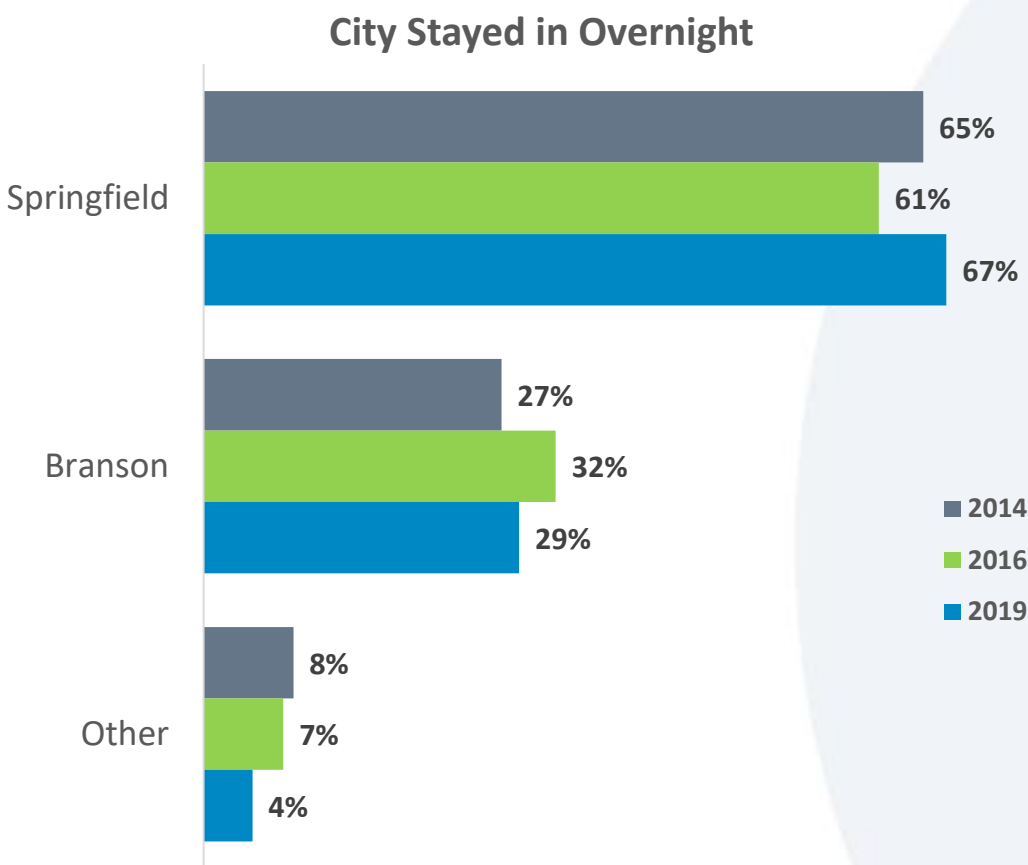


Q25: Which of the following would you say played a significant role in motivating or inspiring you to visit Springfield, MO on the particular occasion? Please select your top 3 choices.

Nearly three-quarters of visitors stayed overnight on their last visit, and most stay in Springfield during their trip to Southwest Missouri.



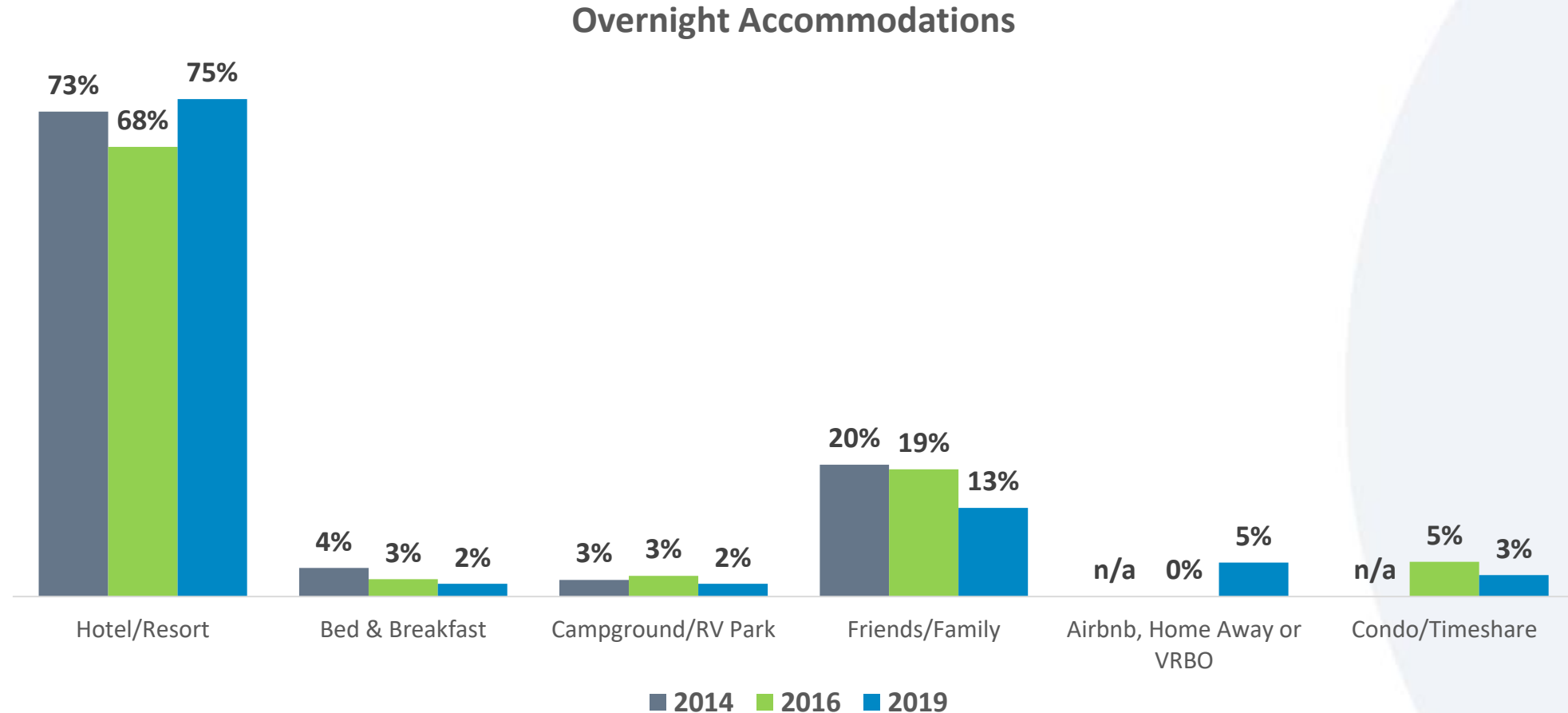
RESPONDENT BASE: VISITED SPRINGFIELD, MO | N=234



RESPONDENT BASE: STAYED OVERNIGHT | N=158

Q28: How many nights did you spend in Springfield on this trip?
Q29: In which of the following cities did you stay on your most recent visit?

Overnight visitors continue to choose hotels for their overnight stay. Staying with friends and family decreased this year in favor of more vacation rentals.



Q30: Which of the following best describes the accommodations you used for that stay?

Those who haven't visited Springfield provide a variety of explanations for not visiting, such as preference for other destinations, a lack of time and money and a lack of information and interest in the area.

PREFER OTHER DESTINATIONS – 12%

"I just think there are better destinations within Missouri, particularly Branson and St. Louis."

TOO EXPENSIVE – 11%

"I simply haven't had the money and vacation time."

NOT ENOUGH TIME – 11%

"Haven't had the time to visit, but I still want to visit very soon."

DON'T KNOW MUCH ABOUT IT – 6%

"Don't know what there is to do there."

NO INTEREST – 5%

"I've passed through it many times but never stopped for a visit. There was nothing that interested me enough to stay."

Non-Visitors' stated reasons for not visiting Springfield also include preferences for other destinations and the fact that Springfield never comes to mind.

% Somewhat/Strongly Agree w/ Reasons for Not Visiting



Q37: Please rate how strongly you agree with the following reasons for why you have not visited Springfield, MO in the past 24 months, if ever.

Barrier Exposure Analysis* reveals that the true (or derived) barriers to visitation, based upon correlation, are that Springfield isn't top of mind and there aren't enough "must sees" compelling them to visit.

STATED HURDLES

1. Have other places that I prefer to visit
2. Just never comes to mind
3. Don't know enough about it to make an informed decision
4. Have not had anyone recommend it to me
5. No "must sees" that are compelling me to visit
6. Inconveniently located for me/too far away
7. Things to do in this destination don't change very often
8. Not for me/not interested in this destination
9. Does not offer enough variety to entertain everyone in my traveling party
10. Not exciting enough for people my age
11. Not affordable for my friends and family
12. Visiting has just become too big of a hassle
13. Health-related issues (e.g. too much walking, not up to it)
14. No place in the area where I would want to spend the night
15. Not enough to keep children entertained
16. No good places to eat in the area
17. It's not a safe destination

DERIVED HURDLES

1. Just never comes to mind
2. No "must sees" that are compelling me to visit
3. Not for me/not interested in this destination
4. Have not had anyone recommend it to me
5. Have other places that I prefer to visit
6. Don't know enough about it to make an informed decision
7. Does not offer enough variety to entertain everyone in my traveling party
8. Not exciting enough for people my age
9. Things to do in this destination don't change very often
10. No place in the area where I would want to spend the night
11. No good places to eat in the area
12. Not enough to keep children entertained
13. Inconveniently located for me/too far away
14. It's not a safe destination
15. Not affordable for my friends and family
16. Health-related issues (e.g. too much walking, not up to it)
17. Visiting has just become too big of a hassle

Q37: Please rate how strongly you agree with the following reasons for why you have not visited Springfield, MO in the past 24 months, if ever.

*The methodology for Barrier Exposure Analysis can be found in the Appendix of this report.

Those most likely to visit Springfield and recommend the area tend to be older, earn higher incomes, are less likely to have children, less educated and less likely to be a Person of Color than the average traveler in the target market.

	Overall	Springfield Visitors	Springfield Non-Visitors	Brand Advocates*
Respondent Age	47	50	43	52
18-34 years old	25%	18%	35%	14%
35-54 years old	39%	38%	39%	40%
55+ years old	36%	43%	27%	46%
Household Income	\$63.0k	\$69.3k	\$54.6k	\$73.6k
Family households	53%	47%	61%	47%
Adult households	47%	53%	39%	53%
College Degree+	43%	47%	38%	37%
Non-Hispanic White	81%	84%	75%	85%
Black	9%	4%	15%	5%
Asian	2%	1%	3%	0%
Hispanic	4%	3%	5%	2%
Other race/ethnicity	9%	10%	8%	10%

*Brand Advocates are those visitors who are likely to return and recommend the area to friends/family.



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Appendix

H2R Market Research Proprietary Industry Norms

For select data points throughout this presentation, we reference H2R Proprietary Industry Norms. This is normative data created, implemented and curated by H2R Market Research and is used to provide decision makers with broader context than that of the competitive set alone.

These references are beneficial because they provide overarching insight into how Springfield's Key Performance Indicators are performing relative to other destinations, communities and attractions operating in the hospitality industry. The H2R Norms provide another level of comparative data insights to help decision makers determine the depth of Springfield's strengths and areas of concern.

The H2R Norms are an application of a disciplined methodology where the wording of questions, positioning, scales and target markets are of a similar character, size and scope. They have been curated over the past 5 years from studies conducted in the hospitality marketplace, e.g. destinations, communities and attractions.

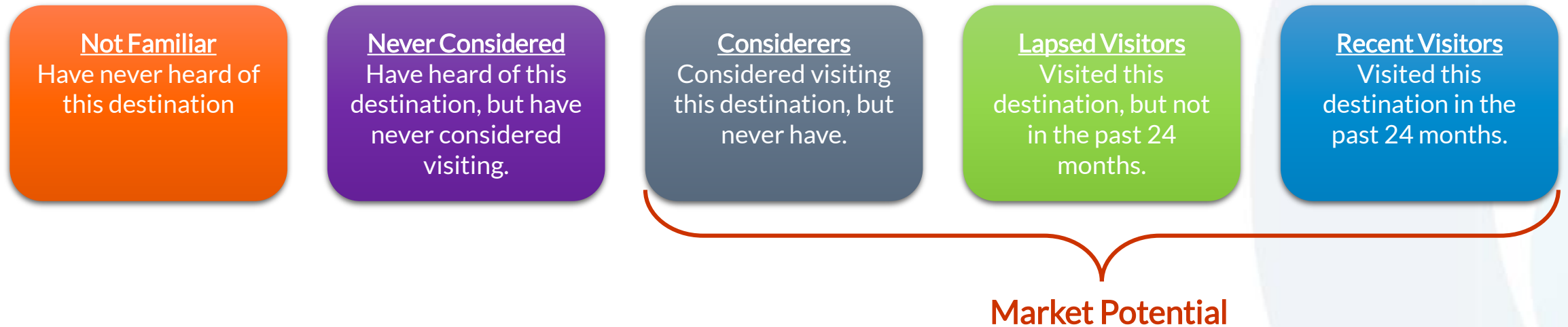
For this study, the H2R Norms include results from 176 destination studies.



Raw Market Potential

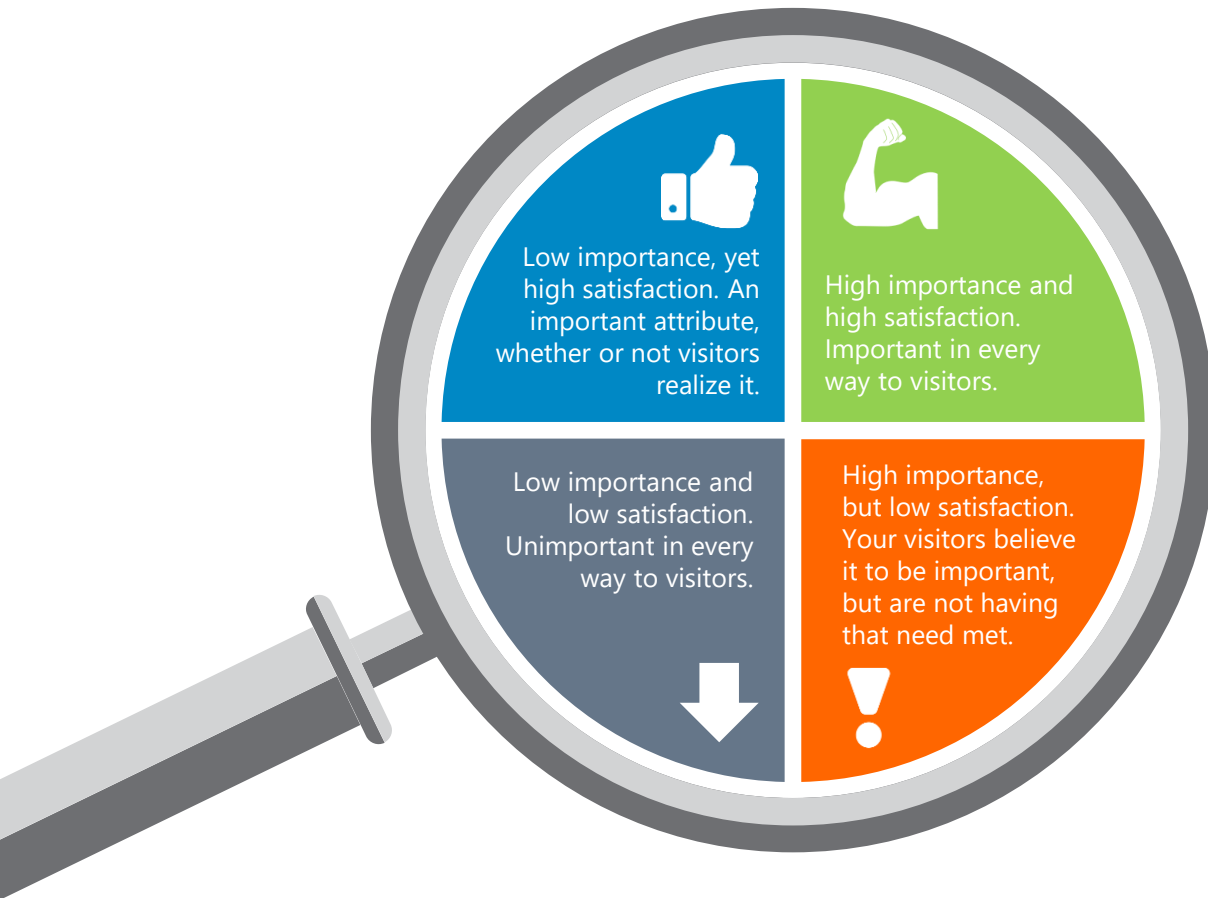
H2R calculates market potential to determine what share of the market is the lowest hanging fruit for converting future visitation to a destination.

“Please indicate your awareness and prior visitation of the following destinations.”



$$\text{Market Potential} = (\% \text{ Considerers}) + (\% \text{ Lapsed Visitors}) + (\% \text{ Recent Visitors})$$

H2R Strengths Finder



Each of Springfield's attributes has been analyzed and segmented into four buckets in the chart to the left. Strengths Finder evaluates the relative importance of each element of the brand alongside visitors' satisfaction with each attribute as it relates to Springfield.

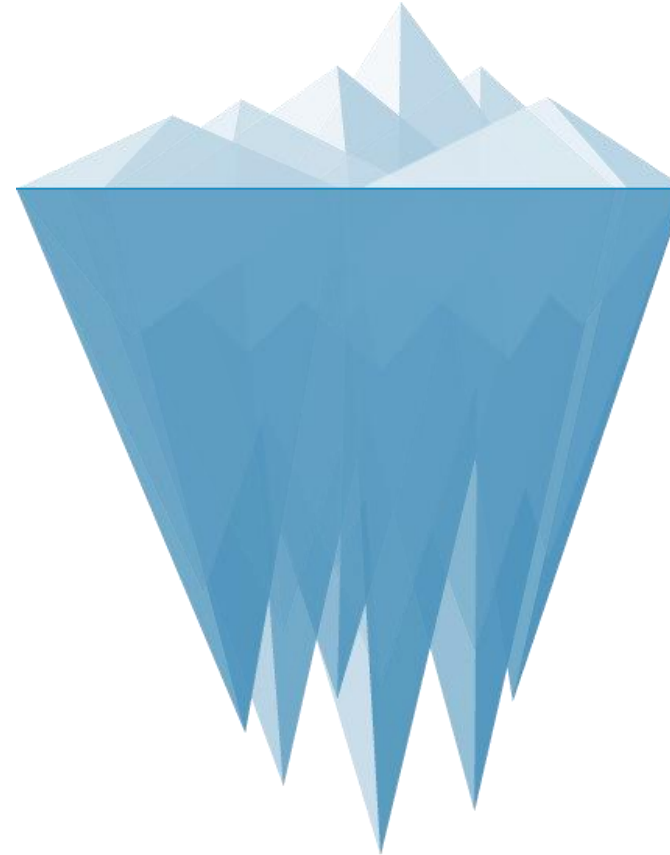
Respondents' scores for importance are plotted on the X axis while the scores for satisfaction are plotted on the Y axis. The average scores for each create the breaking points for the quadrants.

The resulting analysis illustrates which elements of satisfaction are most important by plotting each characteristic into one of four quadrants.

Barrier Exposure Analysis

On the surface, Non-Visitors often provide fairly standard excuses for not visiting, which we refer to as *Stated Barriers* to visitation.

Correlation analysis reveals to what extent Non-Visitors' Stated Barriers match up with their intent to visit Springfield. Arguably, the higher the correlation a barrier has with intent to visit, the more credible the barrier is as a root cause of not visiting. Those that correlate highest are referred to as *Derived Barriers*.



Stated Barriers

(what travelers *said* is keeping them from visiting Springfield)

Derived Barriers

(what *actually* correlates with their intent to visit Springfield)

Thank You!



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