

H2R Market Research

Reveal Your Customer's Full Experience

Springfield, MO CVB 2019 Marketing & Media Effectiveness Research

Delivered January 2020

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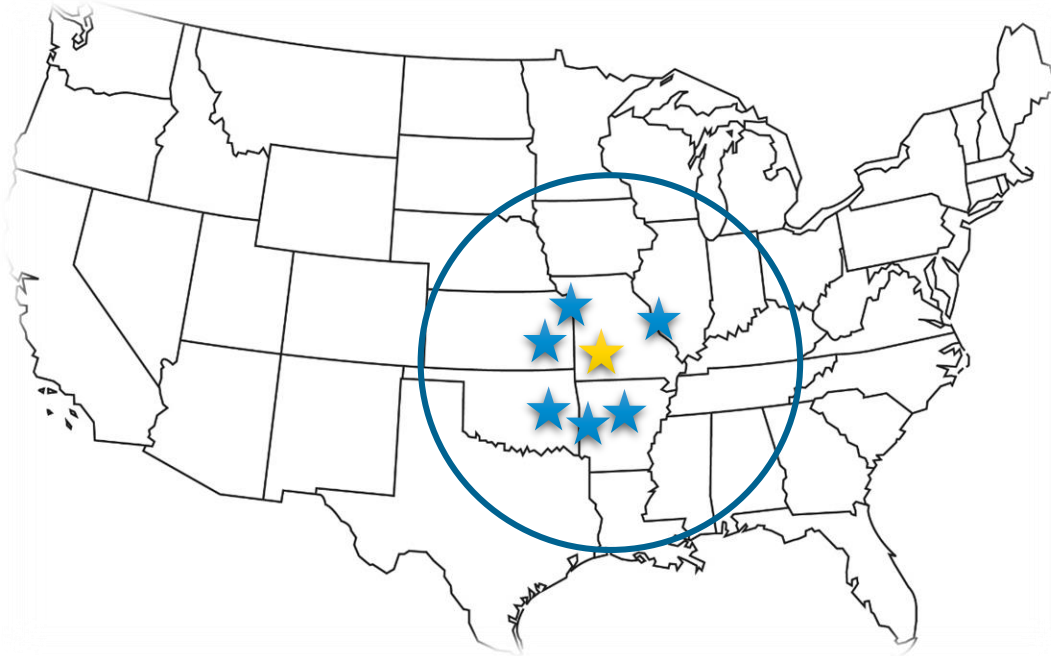
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Purpose. The purpose of this study is to measure the impact Springfield Convention & Visitors Bureau's 2019 marketing campaign had upon visitation and spending, as well as to calculate a marketing ROI. The results of this study have been compared to the previous campaigns, the Springfield Historical Average and the H2R Proprietary Industry Norm (H2R Norm) where applicable.


Target Audience. The Springfield 2019 Marketing & Media Effectiveness Study was conducted among travelers living in the St. Louis, Kansas City, Tulsa, Wichita, Little Rock and Fort Smith DMAs, as well as travelers living within a 51-500 mile radius of Springfield. The research was conducted in December of 2019 in order to capture the travel and spending that was generated as a direct result of the campaign and provide an accurate measurement of the marketing ROI.

Sample. A total of 2,000 travelers were interviewed for this study. This sample size provides for a maximum margin of error of +/- 2.2% at a 95% confidence interval overall.

Advertised Markets



- The sample for the 2019 Marketing & Media Effectiveness study was taken across the Springfield CVB's advertised market area which encompasses a radius of 51-500 miles and included six Spot Markets (Kansas City, St. Louis, Tulsa, Wichita, Fort Smith and Little Rock), all commensurate with how the marketing was placed and measured in the past.
- To represent travelers from each of these areas fairly and appropriately, the results in this study were once again weighted by market tier. Tier 1: 51-150 miles, Tier 2: 151-225 miles, Tier 3: 226-400 miles and Tier 4: 401-500 miles.
- Results from each Tier were weighted commensurate with household population to provide an overall average reflective of the aggregate travel population across the advertised markets, meaning that those areas with larger populations received a heavier weight than markets with smaller populations.



Springfield, MO 2019 Marketing & Media Effectiveness Research

Executive Summary

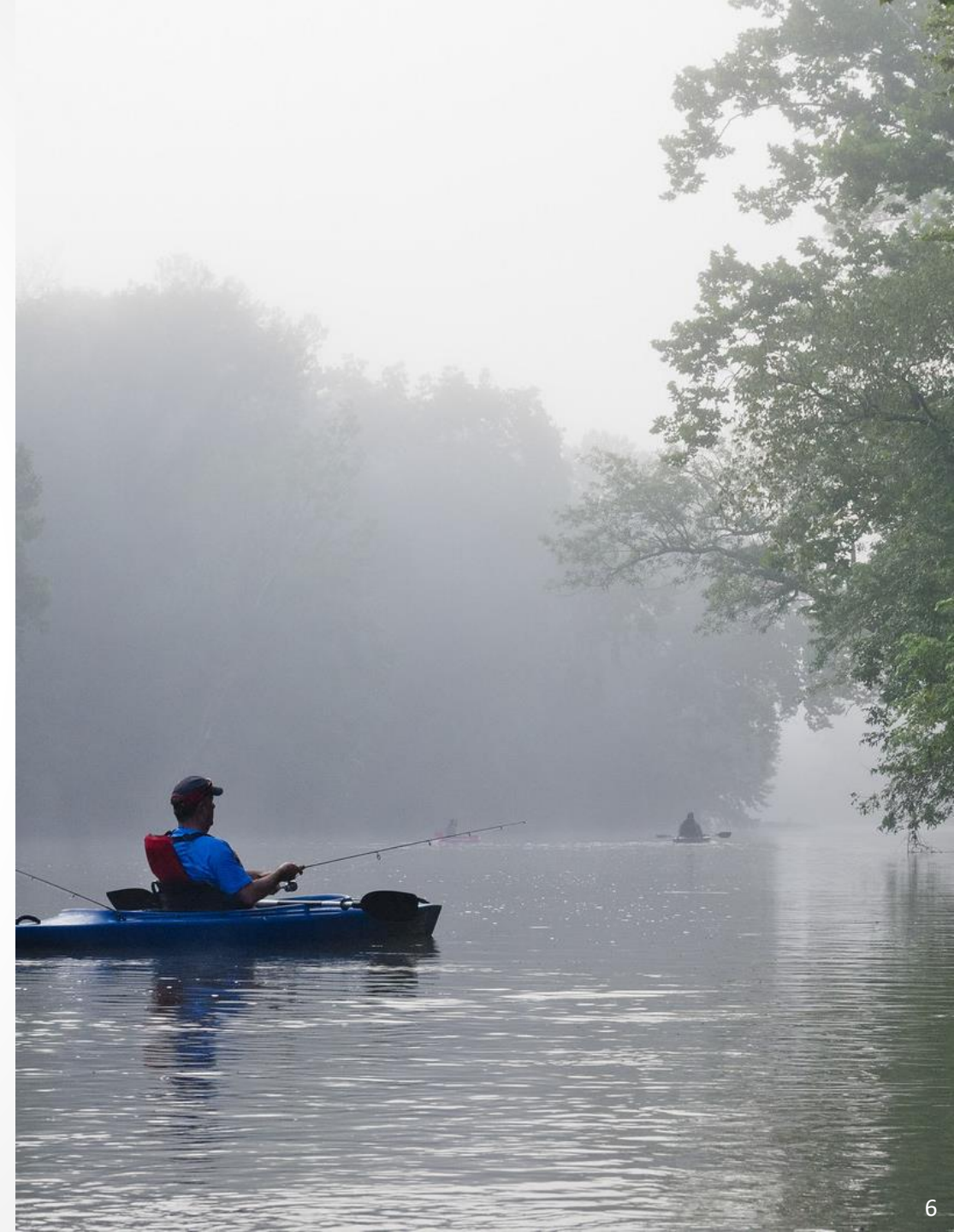
Marketing Efficiency

- The Springfield CVB's 2019 marketing campaign reached 39.5% of travelers across a 500-mile radius, which exceeded the H2R Norm of 35% and improved from 38% in 2018. Overall, Springfield's market reach hit 7.4M aware traveler households, up 2% from 7.3M in 2018.
- Given a media investment of \$1M this year, the SCVB generated a cost per aware travel household that averaged just \$0.14, considered quite efficient compared to the H2R Norm of \$0.27 and is comparable to last year's \$0.13.
- While most metrics improved this year and exceed H2R Norms, some still fall below Springfield's Historical Averages. This is largely due to the use of digital marketing which reaches a more engaged target market and delivers a larger level of incremental visitation than traditional campaigns. But, this improved level of targeting typically delivers a smaller aggregate pool of travelers which hinders marketing efficiency metrics. A similar scenario has been experienced by many other DMOs across the country.



Influenced Travel, Spending & ROI

- While efficiently reaching new travelers is an integral part of a successful campaign, marketing is considered most effective when the travelers who see the ads are ultimately more likely to have visited Springfield than those who were not exposed to the marketing. And that was certainly the case for the Springfield CVB's campaign this year.
- The level of impacted visitation (+1.9%) increased for the third straight year and generated 140k impacted trips in 2019—a record high for Springfield.
- Likewise, these incremental visits generated nearly \$93M in incremental travel spending for the area—topping last year's spending level by 21%.
- Overall, the campaign generated an ROI of \$91, marking a 9% increase over the 2018 ROI and 6% higher than the Springfield Historical Average of \$86.



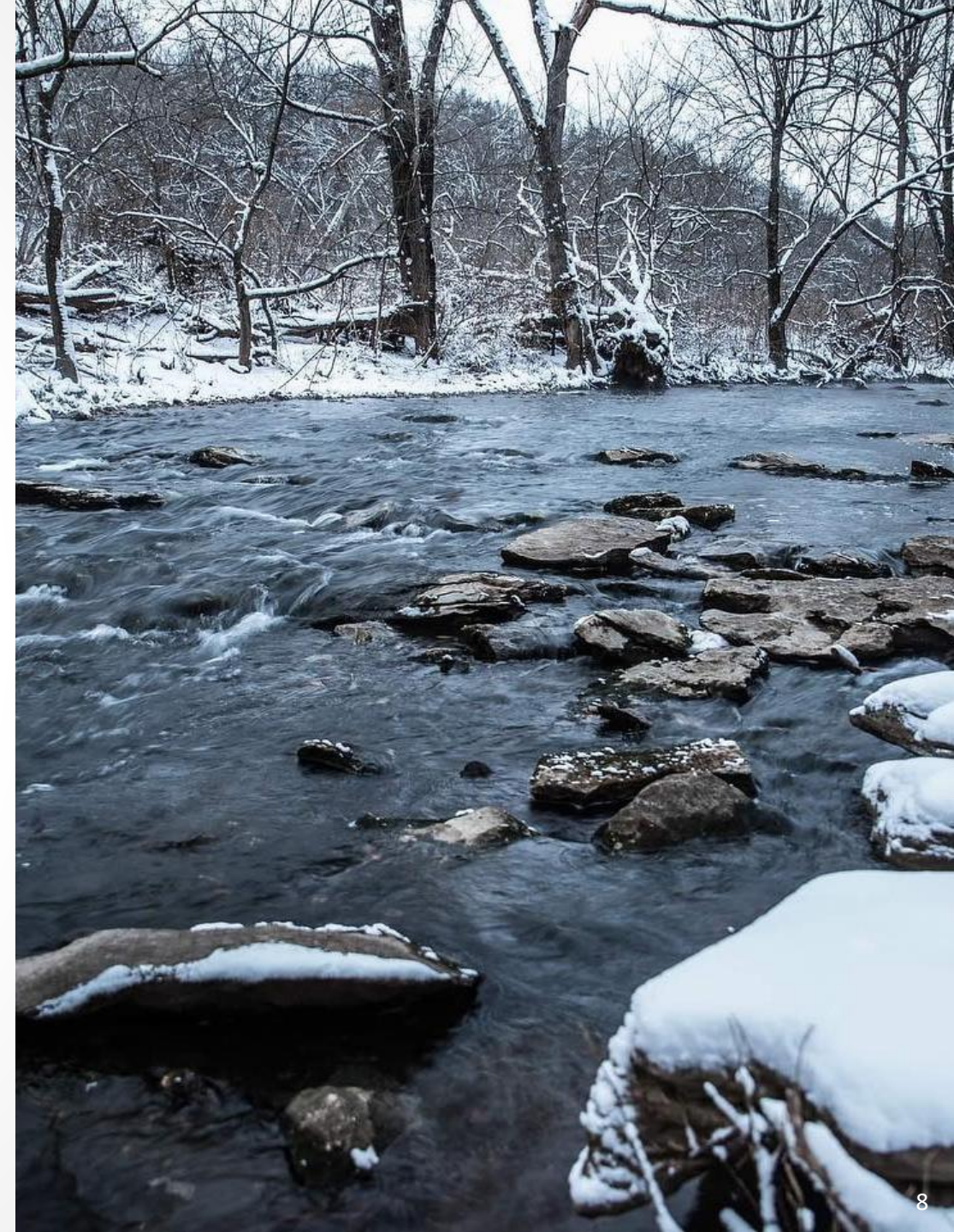
Marketing Evaluation

- Springfield's campaign experienced several improvements in its creative evaluation this year. Nearly three-quarters of travelers in this study felt the ads made Springfield more appealing (+5pts). Travelers were also more likely to believe the ads were relevant to them (+4pts), fit with what they think about Springfield (+4pts) and were differentiated from other destinations' advertising (+8pts).
- Springfield's great outdoors featured in the ads resonated with travelers. They were significantly more likely to select *natural, scenic beauty* as a top takeaway compared to last year (+7pts), but *variety* (47%) and *a fun and exciting family destination* (36%) remain as the top two message takeaways.
- Most importantly, however, the campaign increased travelers' post-exposure intent to visit Springfield by 18 points—up from +12 points in 2018 and considerably higher than the H2R Norm of +8 points.



Springfield Visitation

- Springfield's unaided top-of-mind brand awareness of 1.1% tied with Austin and California. This ratio ranks Springfield at #15 compared to #41 in 2018, #17 in 2017 and #31 in 2016. This level of volatility is not unusual given the changing marketplace and intensity of competition.
- Springfield visitors continue to take nearly two trips per year to the Springfield area, and most visit during the peak season or April-September timeframe (33%). Shopping (45%), Bass Pro Shops (38%) and museums/cultural events (21%) continue to be the most popular activities, as well as the primary drivers.
- Visitors continue to skew toward Caucasian or White (83%) with no children in the home (60%). Prospects (non-visitors who are likely to visit after viewing the ads) are slightly less likely to be Caucasian or White (66%) but more likely to have children in the home (52%).



Springfield, MO 2019 Marketing & Media Effectiveness

Key Performance Indicators for Total Media Spend

Springfield CVB's 2019 marketing campaign impacted more than 140k trips to the area, which in turn impacted \$93M in spending for local businesses.

The CVB's campaign generated these visits at a very efficient rate—just \$0.14 per aware household. The investment in tourism marketing returned \$91 to the area for every dollar spent to generate awareness of the Springfield area as a tourism destination.

Key Performance Indicators	2018	2019	Springfield Historical Average*
Traveling Households	19.1M	18.7M	20.2M
Aided Ad Awareness	38.0%	39.5%	43.9%
Aware Traveler Households	7.3M	7.4M	8.9M
Impacted Travel	+1.6%	+1.9%	+1.5%
Impacted Trips	117k	140k	127k
Impacted Travel Revenue	\$77.4M	\$93.3M	\$83.2M
Media Investment	\$919k	\$1.02M	\$963k
Cost/Aware Household	\$0.13	\$0.14	\$0.11
Return on Investment	\$84	\$91	\$86

*The Springfield Historical Average is an average of all Marketing & Media Effectiveness Studies conducted since 2016.

Springfield, MO 2019 Marketing & Media Effectiveness

Key Performance Indicators for MDT Co-Op Spend

Each year the SCVB receives investment matching dollars from the Missouri Division of Tourism (MDT). The return on the investments made with MDT held strong at \$160 in 2019, slightly lower than 2018's level but still exceeding the Historical Average.

Even with an increased marketing budget from last year, Springfield's cost per aware household was quite efficient at \$0.08—in line with the historical average.

Key Performance Indicators	2018	2019	Springfield Historical Average
Traveling Households	19.1M	18.7M	20.2M
Aided Ad Awareness	38.0%	39.5%	43.9%
Aware Traveler Households	7.3M	7.4M	8.9M
Impacted Travel	+1.6%	+1.9%	+1.5%
Impacted Trips	117k	140k	127k
Impacted Travel Revenue	\$77.4M	\$93.3M	\$83.2M
Media Investment	\$441k	\$700k	\$712k
Cost/Aware Household	\$0.06	\$0.09	\$0.08
Return on Investment	\$175	\$133	\$124

Springfield, MO 2019 Marketing & Media Effectiveness Research

Marketing Efficiency

Park Central Square

Marketing Efficiency

KEY PERFORMANCE INDICATORS



40%
of travelers have
seen/heard a
Springfield
advertisement



7.4M
traveler households
were reached by
Springfield's
advertising

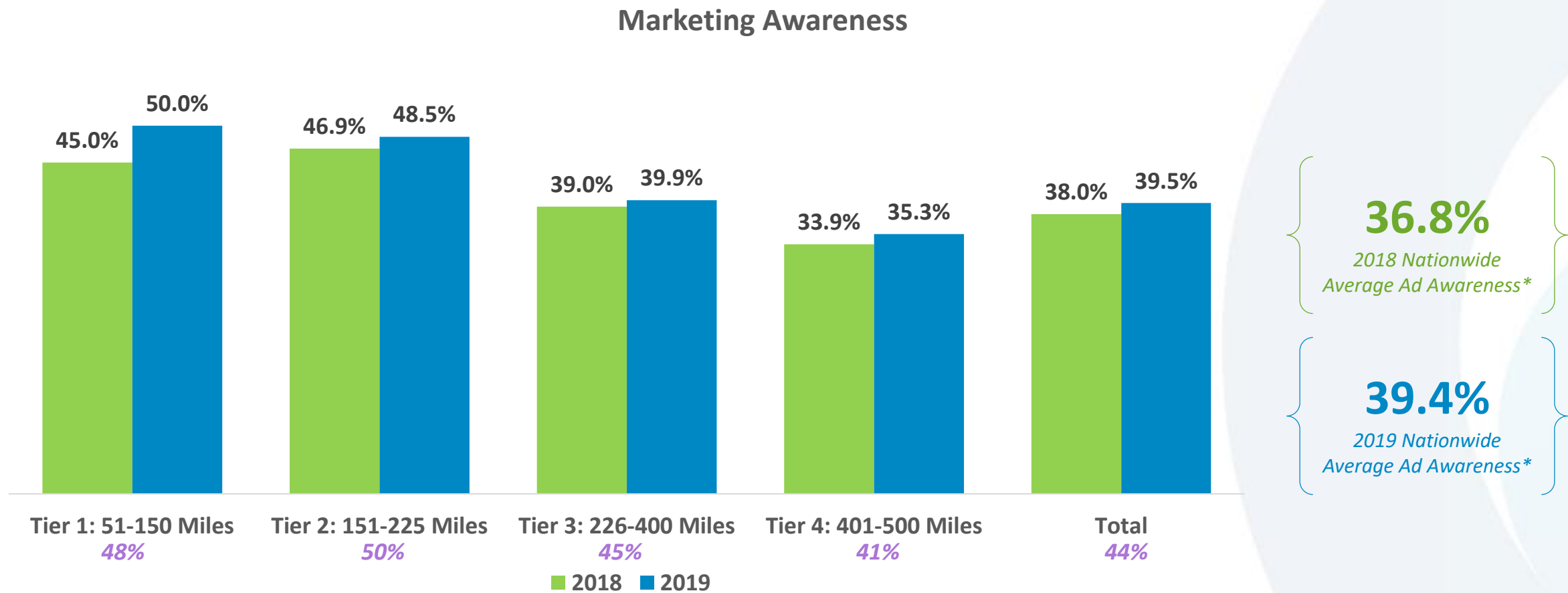


\$1.02M
spent on
advertising in the
target markets



\$0.14
spent to reach each
aware travel household
in the target markets

Springfield’s level of marketing awareness increased across all tiers. And, overall awareness is in line with the nationwide average for advertising awareness this year.



Q31-38: Have you seen this advertisement or one similar?
*The Nationwide Average Ad Awareness is derived from the H2R Proprietary Industry Norm of destinations across the country with similar advertising budgets to the SCVB.

Market Reach (Aware Traveler Households)

Market reach totaled 7.4M travel households this year, up from 7.3M in 2018.

While the number of consumers in Springfield's target markets who traveled has continued to decline, the campaign reached far more consumers this year—increasing total market reach.

Those living in Tiers 1 and 2 had the highest percentage of travelers aware of Springfield's ads. However, Tiers farther from Springfield have higher populations, and therefore yield higher levels of market reach.

Market	2018 Market Reach	2019 Market Reach	Springfield Historical Average
Tier 1: 51-150 miles	542k	582k	593k
Tier 2: 151-225 miles	970k	1.0M	1.1M
Tier 3: 226-400 miles	2.9M	2.9M	3.5M
Tier 4: 401-500 miles	2.8M	2.9M	3.7M
Total Market	7.3M	7.4M	8.9M

Media Investment & Efficiency

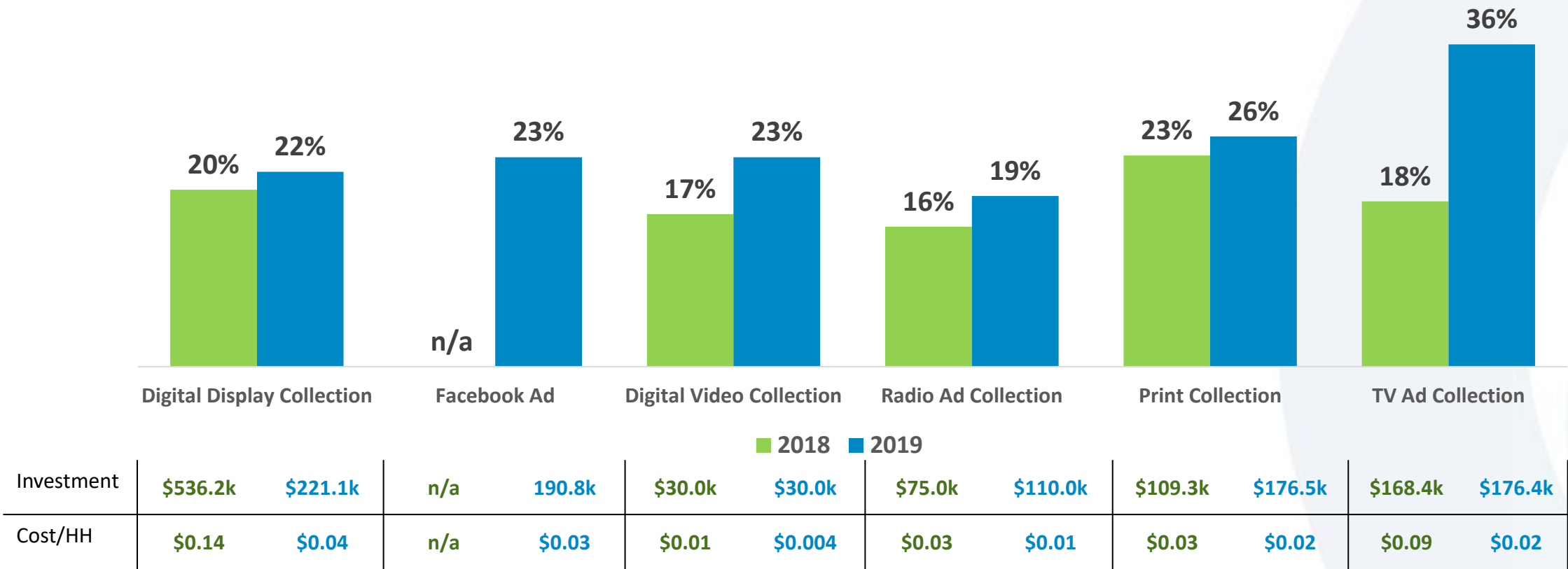
The total campaign investment increased by 11% this year to just over \$1M. The cost per aware travel household for the Springfield advertising campaign was just \$0.14.

This is much lower than the H2R Norm of \$0.27 for destinations with similar sized advertising budgets, but slightly higher than the Springfield Historical Average of \$0.11.

Market	2018 Investment	2019 Investment	Springfield Historical Average
Tier 1: 51-150 miles	\$66,294	\$71,577	\$62,927
Tier 2: 151-225 miles	\$118,604	\$132,790	\$152,439
Tier 3: 226-400 miles	\$409,163	\$444,766	\$396,109
Tier 4: 401-500 miles	\$324,890	\$371,606	\$351,877
Total Market	\$918,950	\$1,020,738	\$963,352
Market	2018 Cost/HH	2019 Cost/HH	Springfield Historical Average
Tier 1: 51-150 miles	\$0.12	\$0.12	\$0.11
Tier 2: 151-225 miles	\$0.12	\$0.13	\$0.13
Tier 3: 226-400 miles	\$0.14	\$0.15	\$0.12
Tier 4: 401-500 miles	\$0.12	\$0.13	\$0.10
Total Market	\$0.13	\$0.14	\$0.11

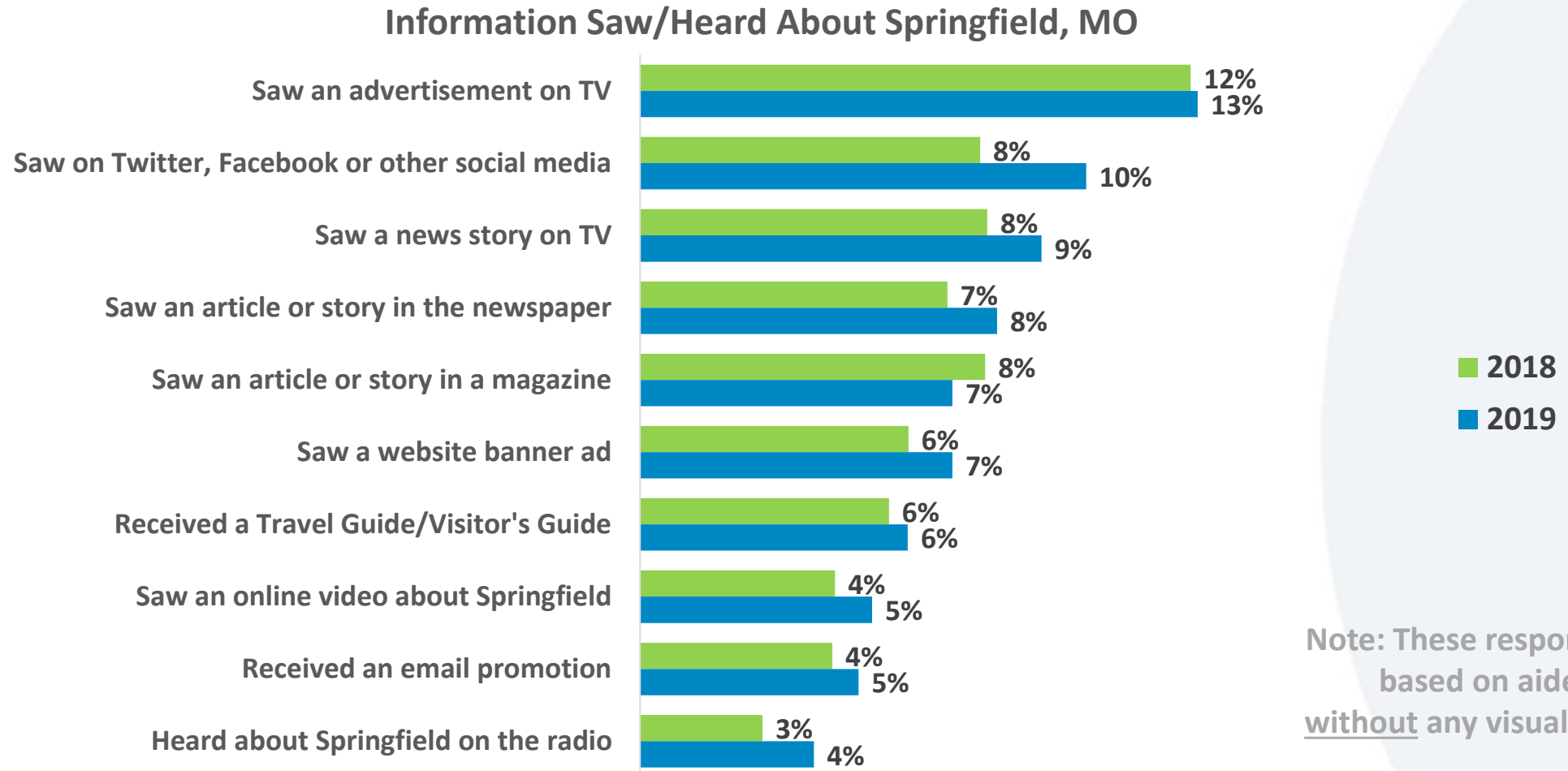
Awareness increased across each advertising medium this year, with the TV ad collection enjoying the largest improvement (+18pts).

Marketing Awareness by Medium



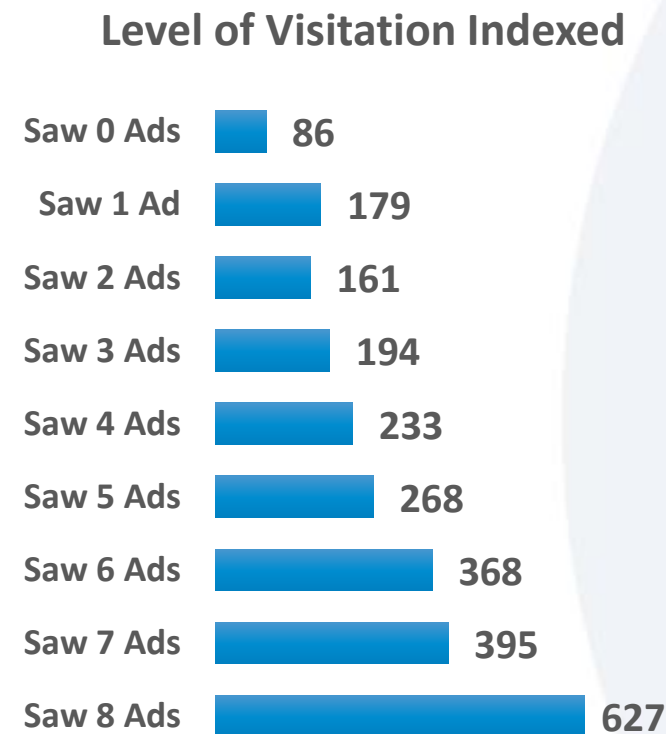
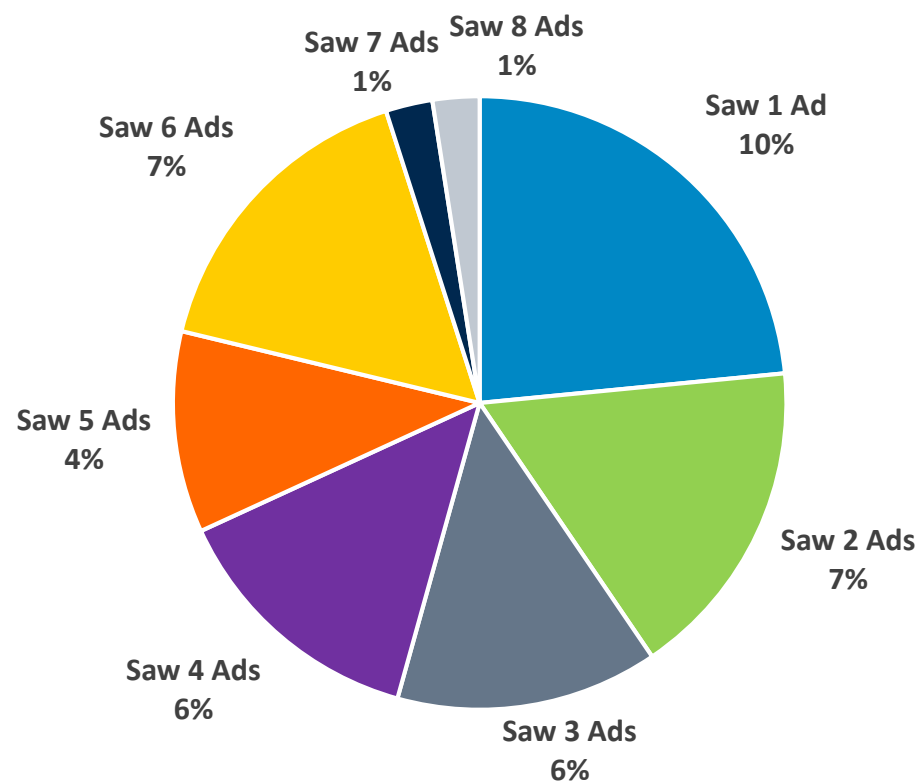
Q31-38: Have you seen this advertisement or one similar?

Assisted ad awareness of Springfield was on par with 2018 levels for most mediums this year.



Q30: Please indicate which of the following places, if any, you have seen or received information about Springfield, MO in the past 12 months.

Higher ad exposure once again delivered increased visitation. The more SCVB ad exposures travelers recalled (2+), the more likely they were to have visited Springfield in 2019.



Springfield, MO 2019 Marketing & Media Effectiveness Research

Incremental Impact



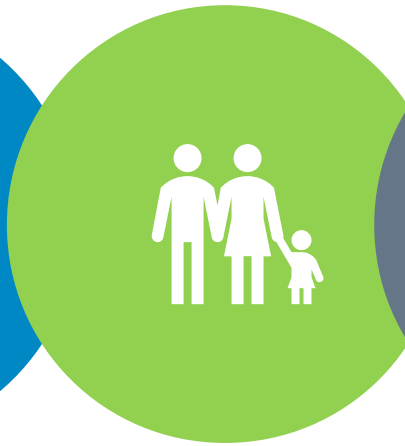
Incremental Impact

KEY PERFORMANCE INDICATORS



140.1k

incremental trips were
generated by the 2019
campaign



\$666

was spent by each
travel party while in
the area



\$93.3M

in incremental revenue
was generated by the
2019 campaign

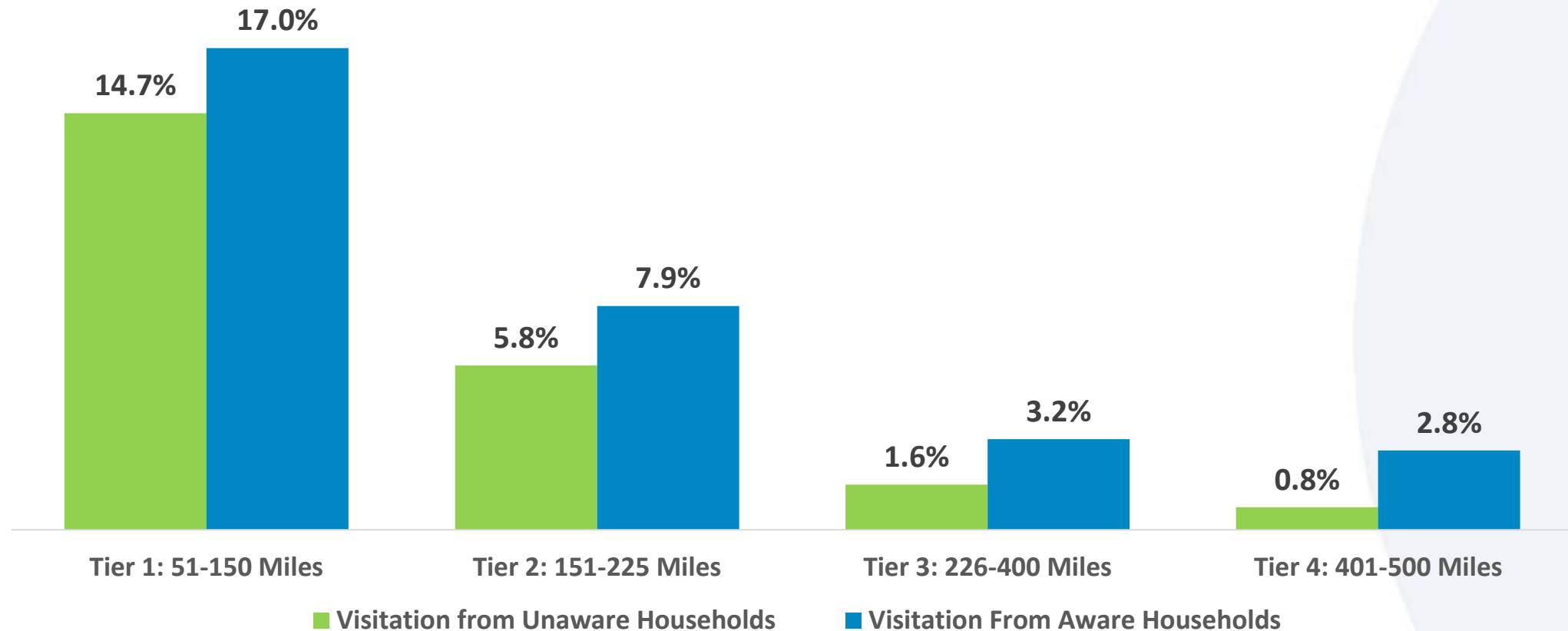


\$91

returned to the local
economy for each dollar
invested in the campaign

Every market tier was positively impacted by the campaign this year. Meaning, those reached by the SCVB's marketing messages had higher levels of visitation than those who did not recall seeing any ads.

Visitation – Aware vs. Unaware Households



Visitation Impacted

Springfield's 2019 marketing campaign impacted more than 140k trips that may not have otherwise occurred.

Impacted travel is the difference in visitation between those households who were aware of the SCVB's advertising and those who were not. This year's impacted travel exceeded the Springfield Historical Average.

Market	2018 Impact	2019 Impact	Springfield Historical Average
Tier 1: 51-150 miles	2.1%	2.4%	2.0%
Tier 2: 151-225 miles	2.3%	2.1%	2.1%
Tier 3: 226-400 miles	1.5%	1.5%	1.2%
Tier 4: 401-500 miles	1.4%	2.1%	1.5%
Total Market	1.6%	1.9%	1.5%

Market	2018 Impacted Trips	2019 Impacted Trips	Springfield Historical Average
Tier 1: 51-150 miles	11.6k	13.8k	11.6k
Tier 2: 151-225 miles	22.3k	22.3k	22.7k
Tier 3: 226-400 miles	43.8k	44.6k	40.4k
Tier 4: 401-500 miles	39.7k	59.7k	52.3k
Total Market	117.4k	140.1k	127.1k

Springfield's marketing campaign generated incremental revenue of nearly \$93.3M and an overall ROI of \$91.



Impacted Spending & ROI

The 2019 campaign impacted spending in the Springfield area of \$93M—resulting in an ROI of \$91.

In 2018, those visiting from Tiers 2 and 3 had impacted spending that was much higher than the average for Springfield. This year, Tiers 1 and 2 leveled out, while Tiers 1 and 4 experienced notable increases.

Market	2018 Impacted Spending	2019 Impacted Spending	Springfield Historical Average
Tier 1: 51-150 miles	\$5.9M	\$8.2M	\$5.7M
Tier 2: 151-225 miles	\$14.7M	\$15.7M	\$13.6M
Tier 3: 226-400 miles	\$28.6M	\$28.7M	\$25.9M
Tier 4: 401-500 miles	\$28.2M	\$40.7M	\$37.9M
Total Market	\$77.4M	\$93.3M	\$83.1M
Market	2018 ROI	2019 ROI	Springfield Historical Average
Tier 1: 51-150 miles	\$88	\$115	\$84
Tier 2: 151-225 miles	\$124	\$118	\$104
Tier 3: 226-400 miles	\$70	\$65	\$70
Tier 4: 401-500 miles	\$87	\$109	\$108
Total Market	\$84	\$91	\$86

Springfield Room Nights/Units Impacted



743k

Incremental Room Nights
Across Lodging
Categories

The 2019 campaign impacted more than 743k *total room nights/units* among those who stayed overnight in paid accommodations in Springfield, MO.

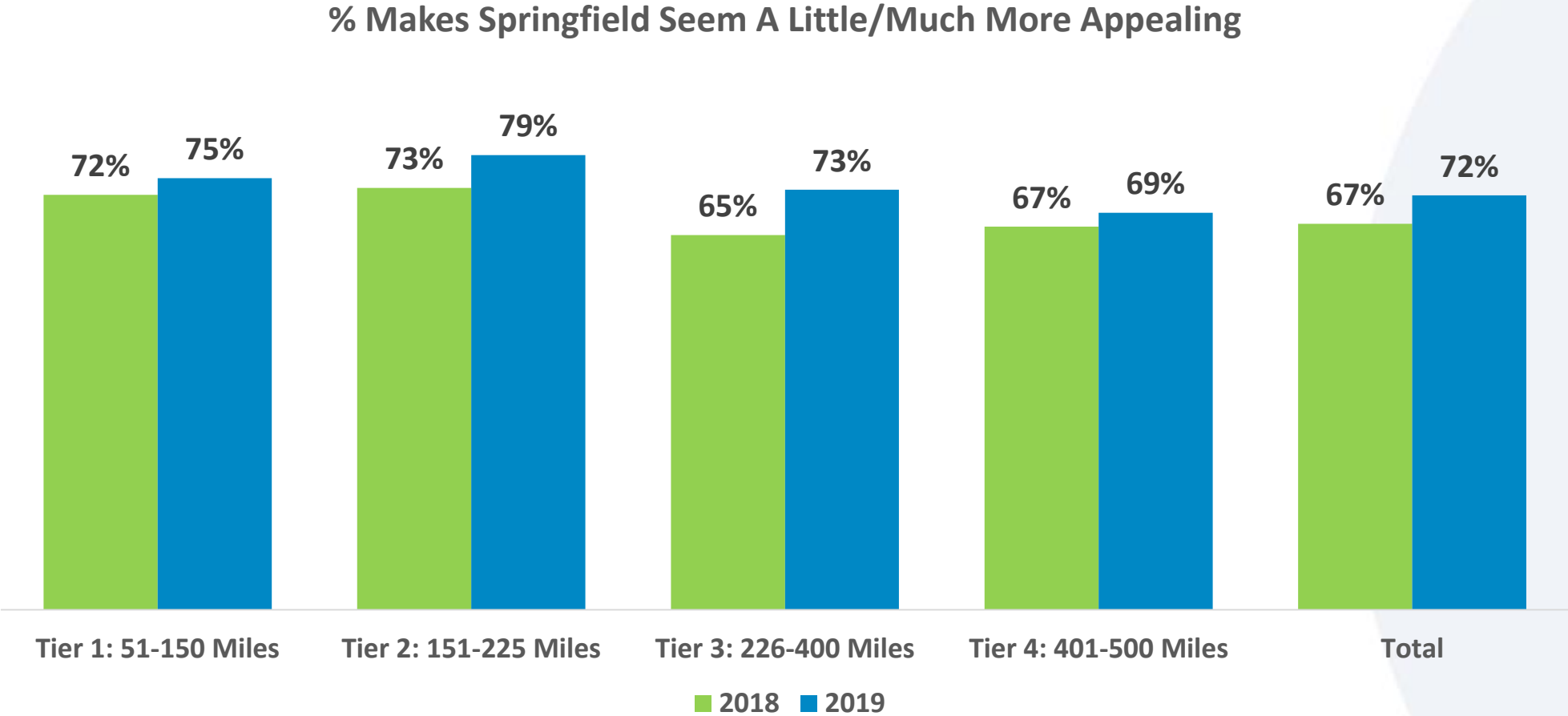
Extrapolated across the number of rooms purchased, length of stay and those spending the night in Springfield, it is estimated that the 2019 campaign influenced approximately 23% of the total commercial room nights/units purchased by Springfield area visitors.

Springfield, MO 2019 Marketing & Media Effectiveness Research

Marketing Evaluation

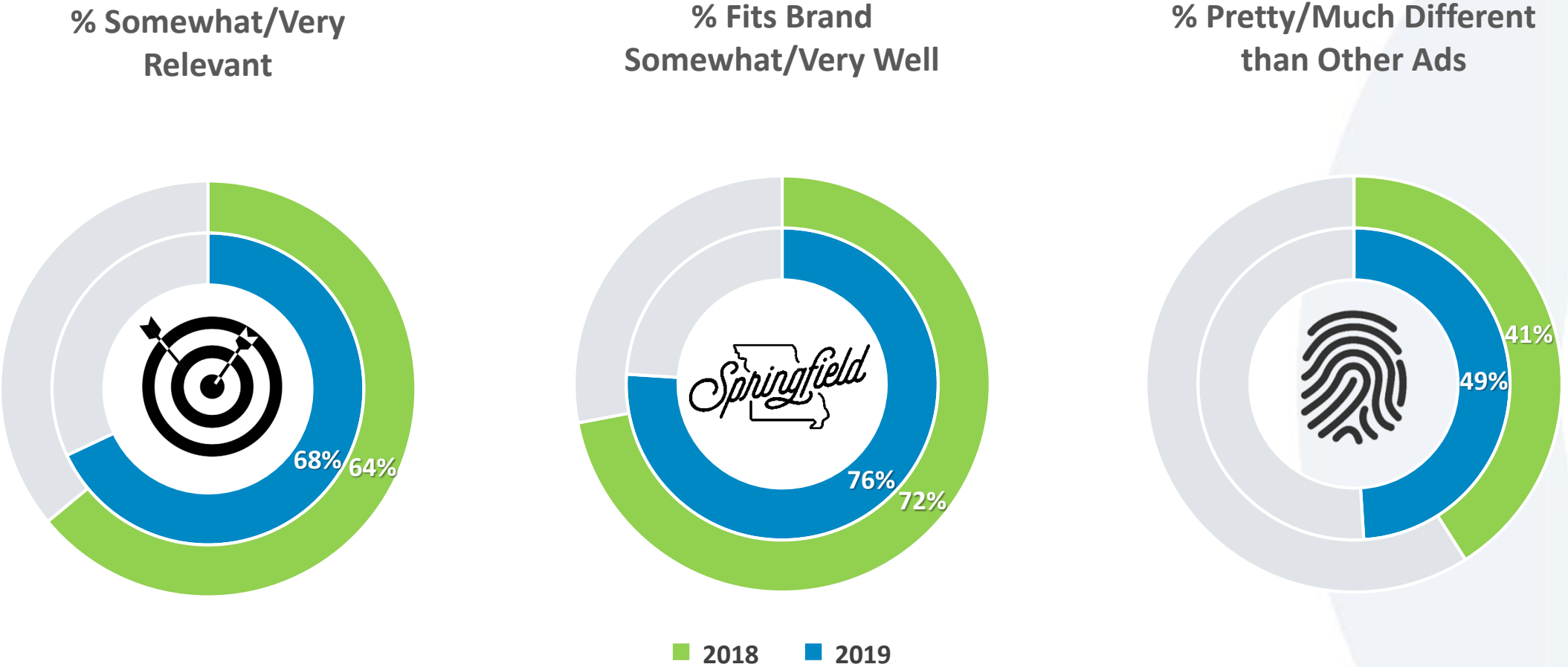


The ads’ ability to make Springfield seem like a more appealing destination increased by a significant five points this year.

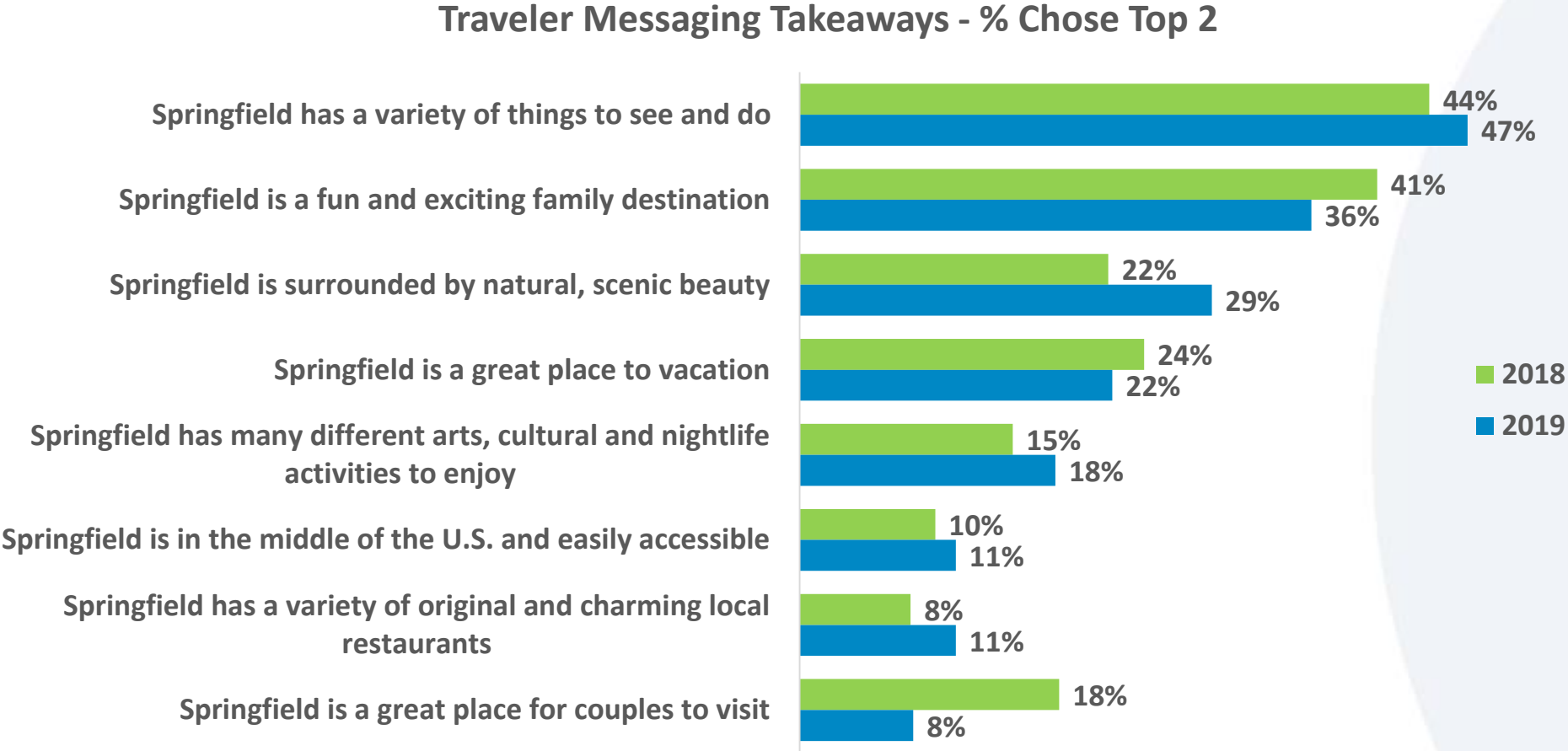


Q39: Using the scale provided, please indicate the degree to which these ads make Springfield, MO seem more appealing to you.

Travelers continue to believe that the ads fit well with what they know about Springfield (+4 pts) and are relevant (+4pts). The ads' differentiation improved a notable eight points.

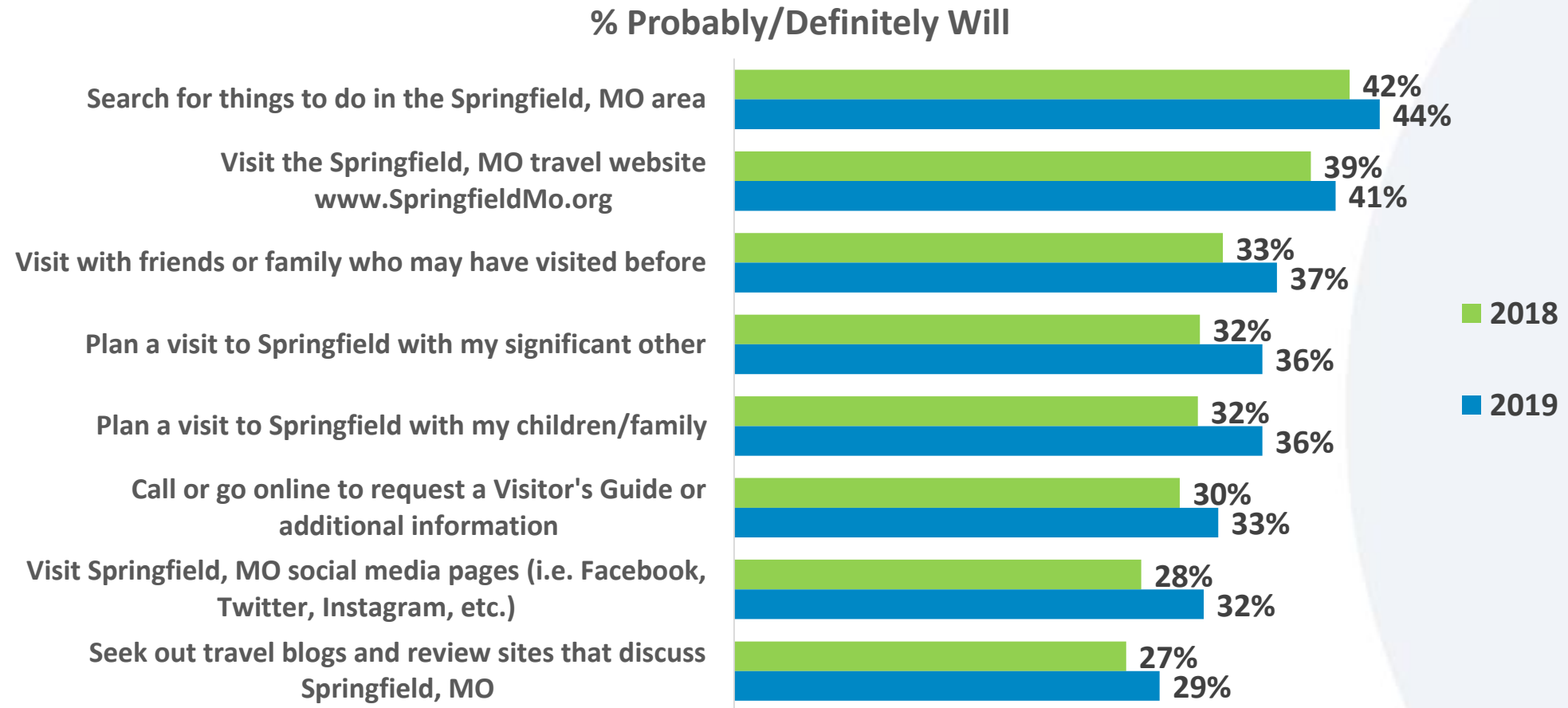


Variety remains the biggest message takeaway; although, other takeaways shifted a bit this year. Travelers were more likely to select natural, scenic beauty than a great place for couples to visit.

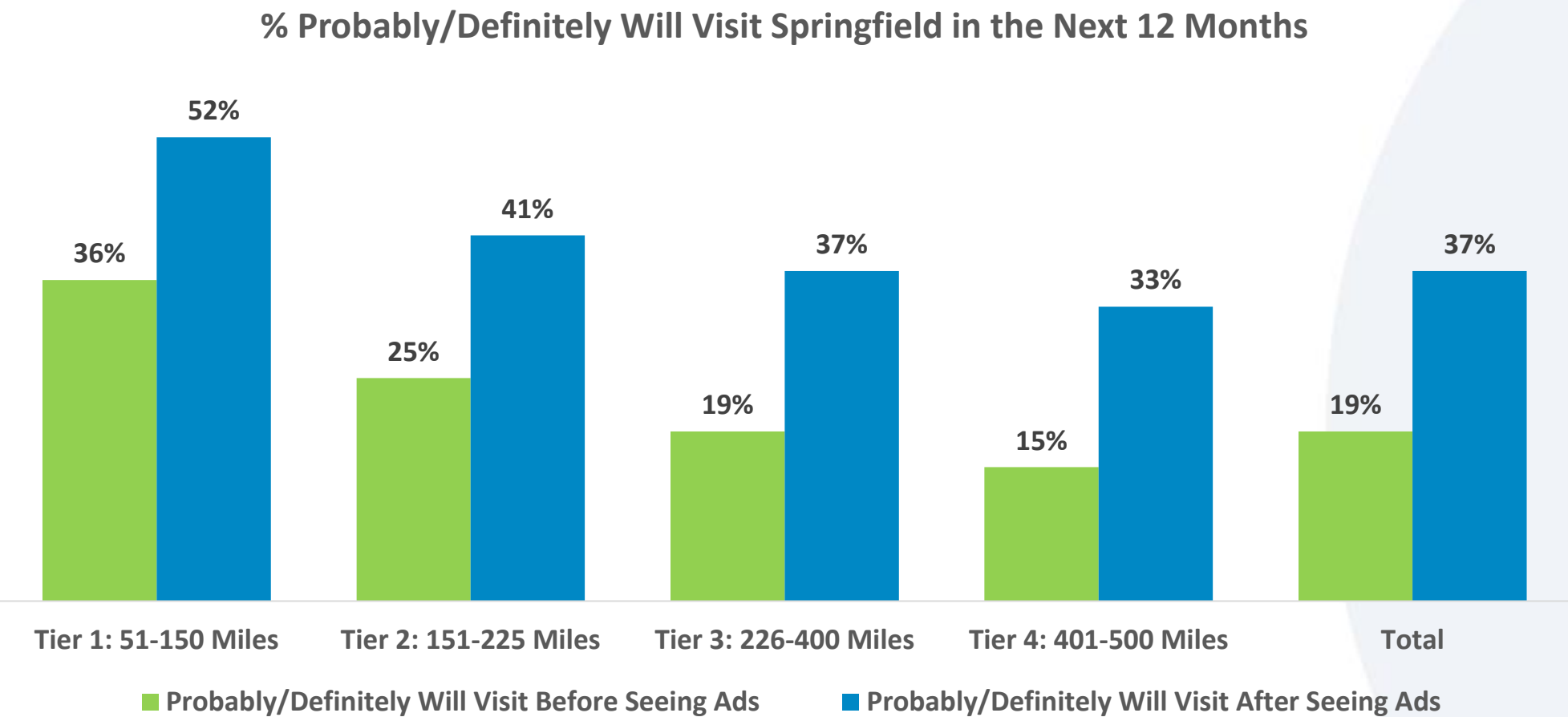


Q43: Which of the following messages, if any, did you take away from the group of advertisements you viewed about the Springfield, MO area?

Post-ad exposure intentions increased significantly across most metrics.



Post-ad exposure variance in intent to visit Springfield increased across all market tiers and averaged +18 points, considerably higher than H2R's Norm (+8 points).





Springfield 2019 Marketing & Media Effectiveness Research

Springfield Traveler Profile

Springfield's top-of-mind brand awareness (1.1%) ranked 15th this year tying with Austin and California.



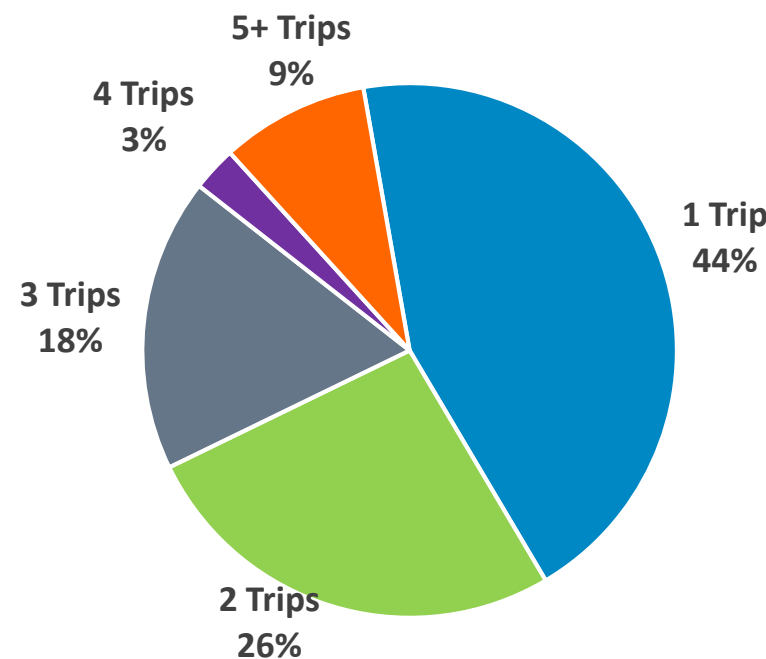
Rank	Destination	Awareness
1	Branson	5.8%
2	Chicago	5.2%
3	Kansas City	4.7%
4	St. Louis	3.8%
5	Dallas	3.4%
6	Nashville	2.9%
7	Las Vegas	2.4%
8	Florida	2.1%
9	Denver	2.0%
10	New Orleans	2.0%
11	Memphis	1.6%
12	Orlando	1.5%
13	San Antonio	1.4%
14	Tulsa	1.3%
15	Springfield	1.1%
15	California	1.1%
15	Austin	1.1%
18	Gatlinburg	1.1%
19	Atlanta	0.9%
20	Hawaii	0.8%

Q6: When you think of cities in your region you would enjoy visiting for leisure, which destinations first come to mind?

Nearly half (48%) of travelers' most recent visit to the area was in 2019.

Number of Trips in Past 12 Months

2.3 | 2.2



Most Recent Visit to Springfield, MO



2018 2019

RESPONDENT BASE: SPRINGFIELD, MO VISITORS PAST 12 MONTHS | N=241

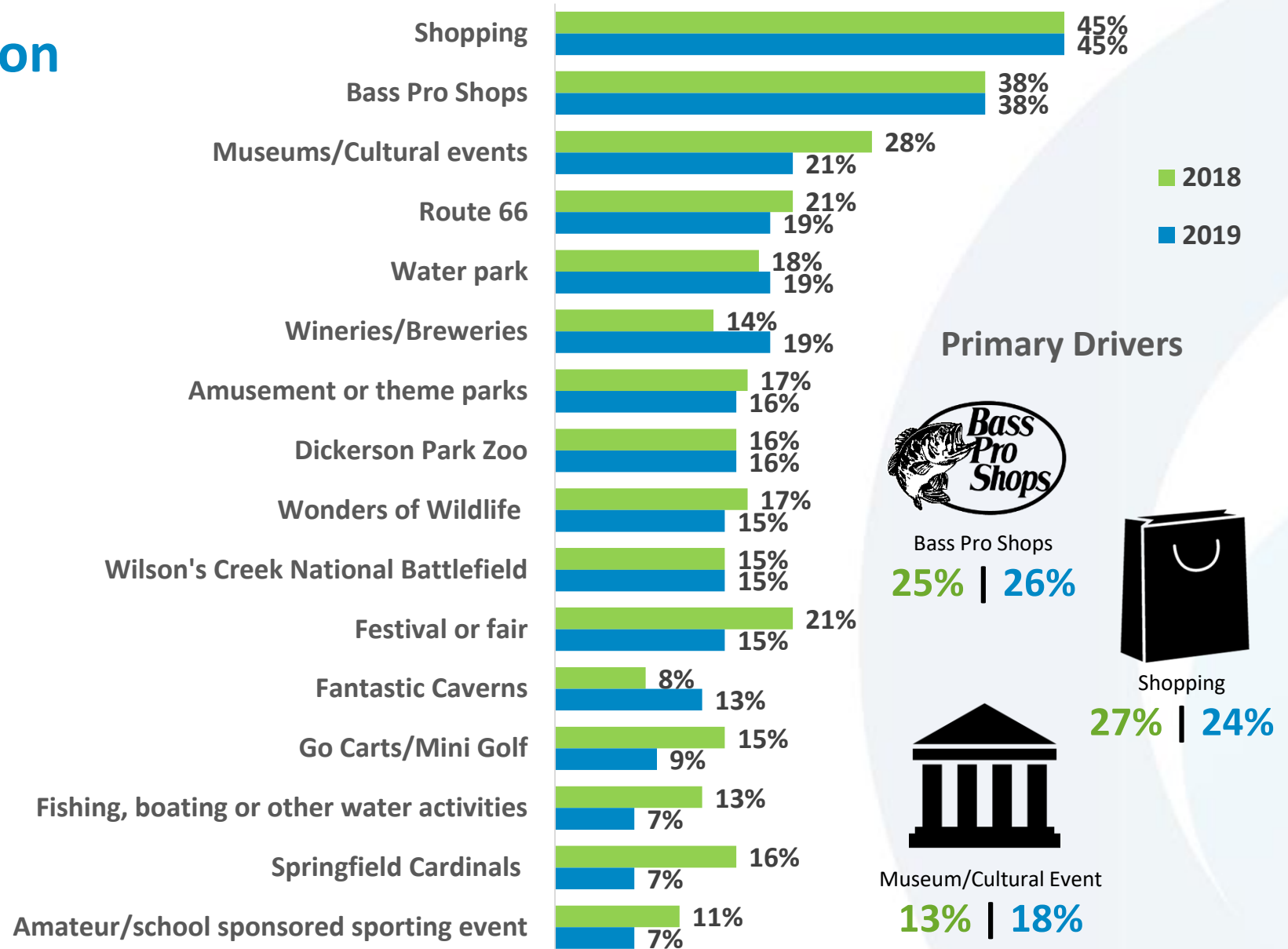
RESPONDENT BASE: SPRINGFIELD, MO VISITORS PAST 3 YEARS | N=342

Q14: How many trips did you make to Springfield, MO in the past 12 months?
Q15: When was your most recent visit to Springfield, MO?

Area Activity Participation

Shopping and Bass Pro Shops continue to be the most popular activities in Springfield, and the ones that drive the most visitation to the area.

Visitors were slightly less engaged with tourism activities relative to last year. Although, patronage to wineries/breweries and Fantastic Caverns both increased by five points.

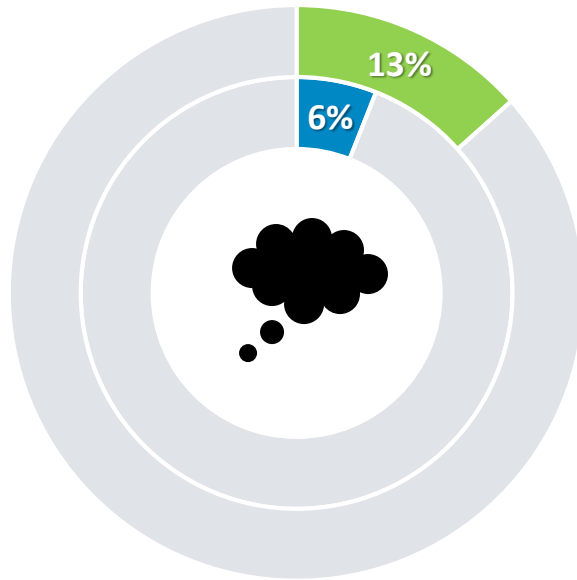


Q16: Which of the following activities or experiences, if any, did you participate in on your most recent visit to Springfield, MO? Q17: Of these activities, please indicate if there were any that were a major influence in your decision to visit Springfield, MO on your most recent trip.

RESPONDENT BASE: SPRINGFIELD, MO VISITORS PAST 3 YEARS | N=342 35
RESPONDENT BASE: VISITORS WHO PARTICIPATED IN ACTIVITIES | N=295

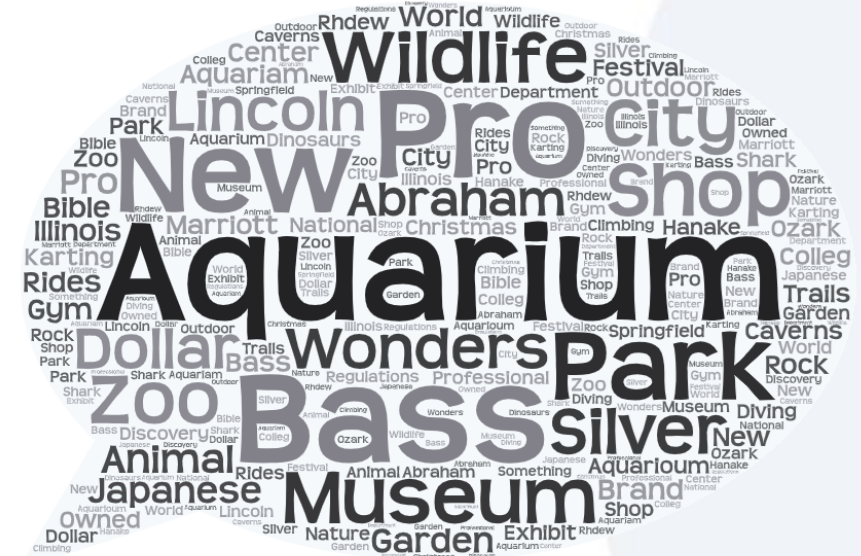
As one might expect, unaided awareness of a new attraction in Springfield decreased. But, those who are aware of a new attraction were much more likely to use the term *Aquarium*, rather than just *Bass Pro*.

Aware of New Attractions (Unaided)



■ 2018 ■ 2019

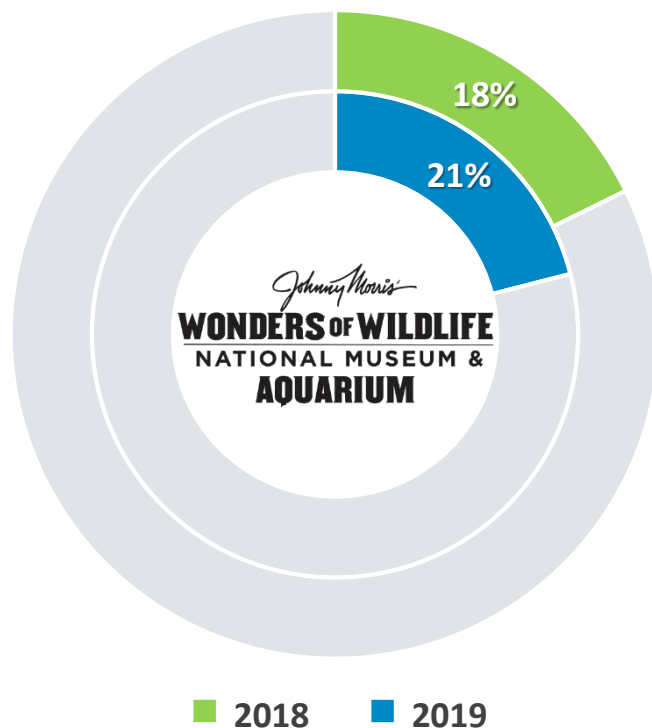
RESPONDENT BASE: SPRINGFIELD, MO VISITORS PAST 3 YEARS | N=539



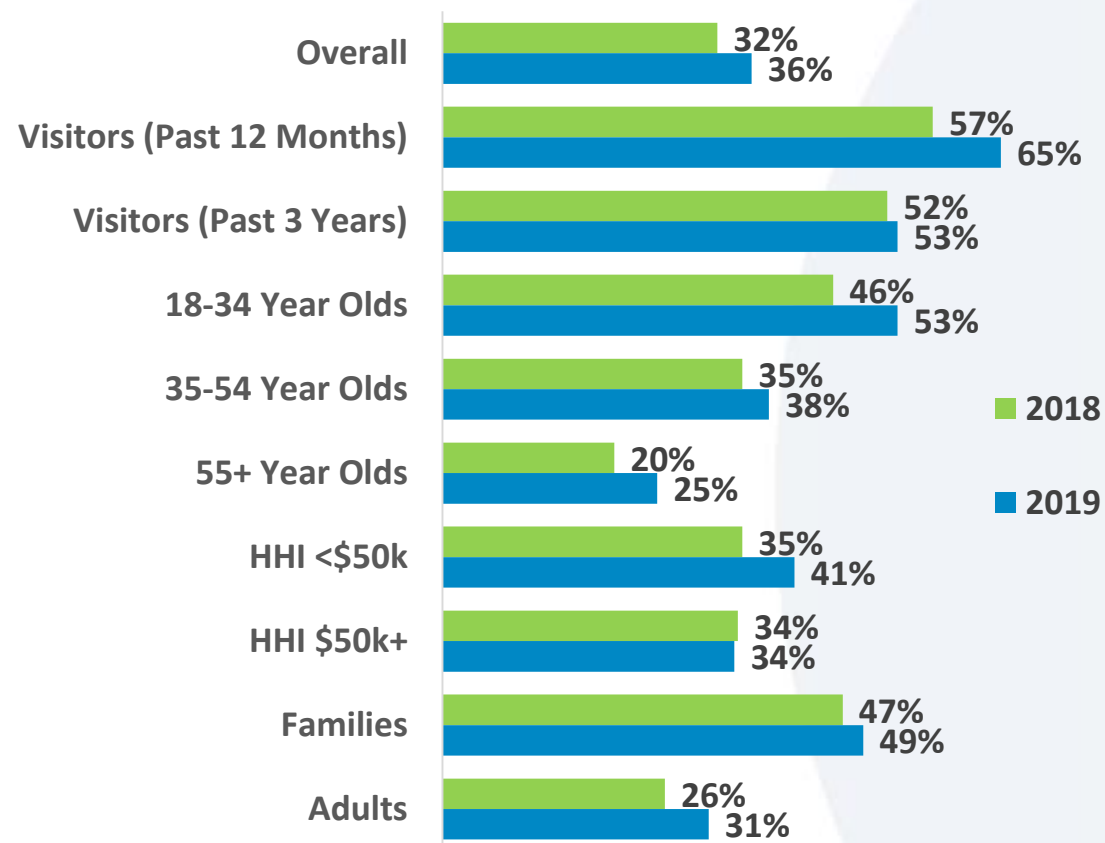
RESPONDENT BASE: AWARE OF A NEW ACTIVITY/ATTRACTION | N=52

Aided awareness of Wonders of Wildlife also increased once again, as did intent to visit Wonders of Wildlife over the next three years.

Aware of Wonders of Wildlife
Museum & Aquarium



Intent to Visit WOW

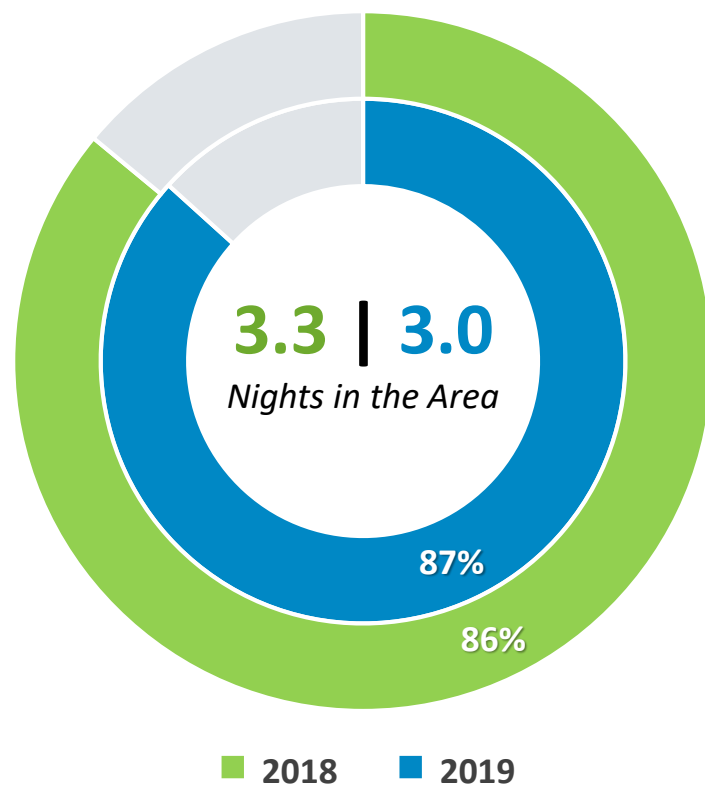


Q28: Are you aware that the Wonders of Wildlife National Museum & Aquarium re-opened in Springfield, MO on September 21st, 2017?

Q29: Using the scale provided, please indicate how likely you are to visit Wonders of Wildlife in the next 3 years.

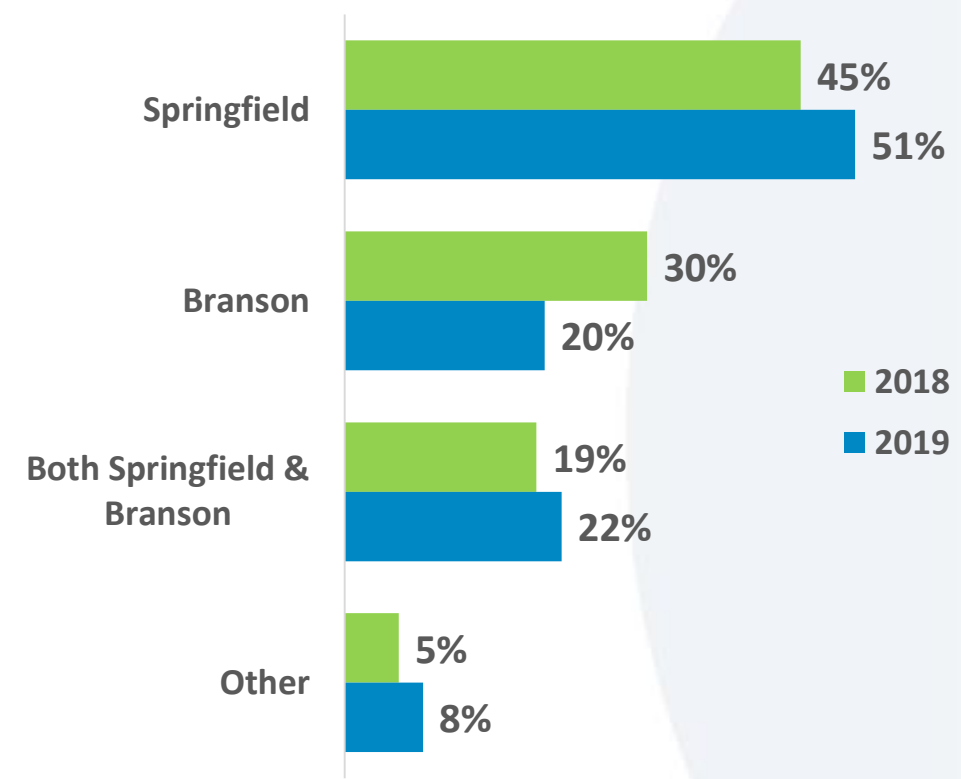
Overnight visitation increased a bit to 87% in 2019, with a similar length of stay to last year. Those staying in Springfield increased six points.

Stayed Overnight in Springfield Area



RESPONDENT BASE: SPRINGFIELD VISITORS LAST 3 YEARS | N=342

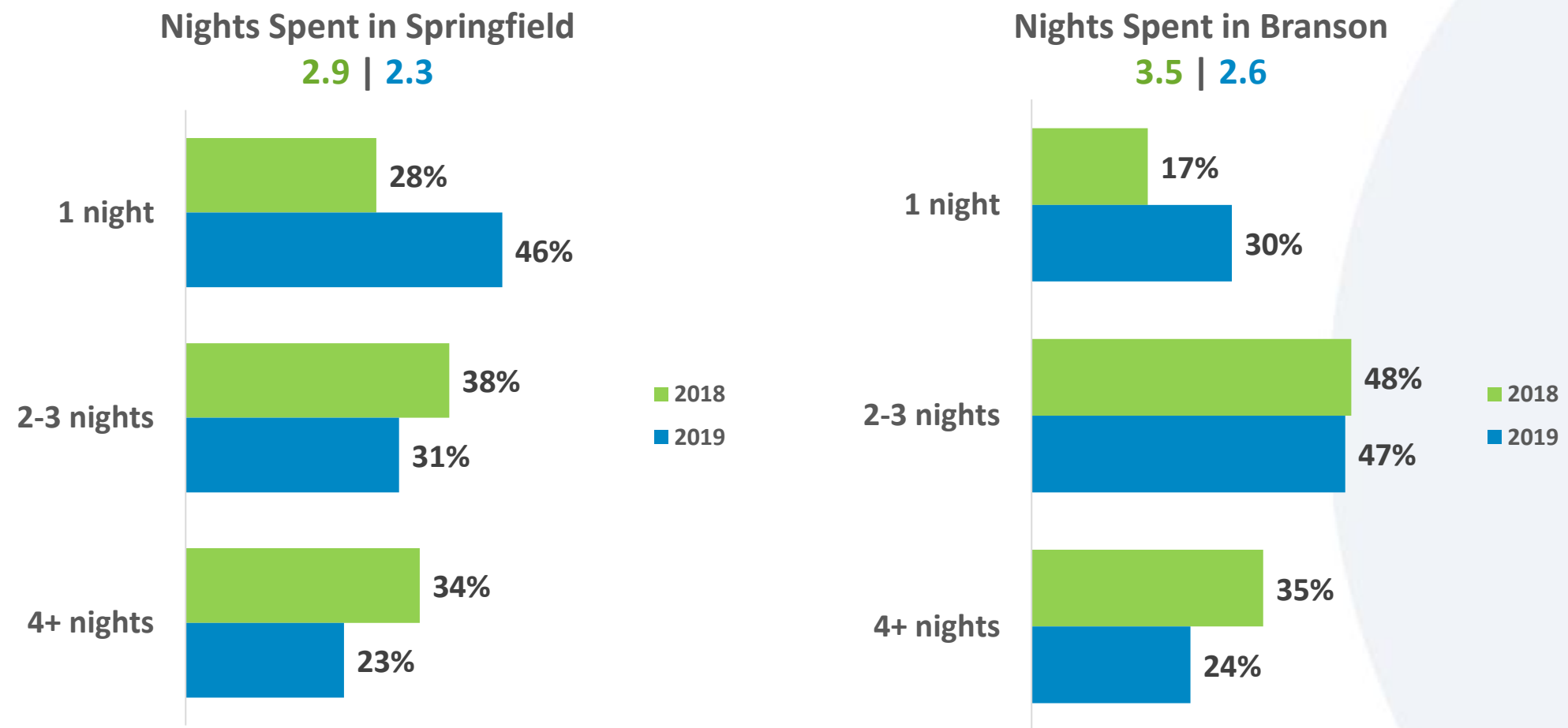
City/Area Stayed In



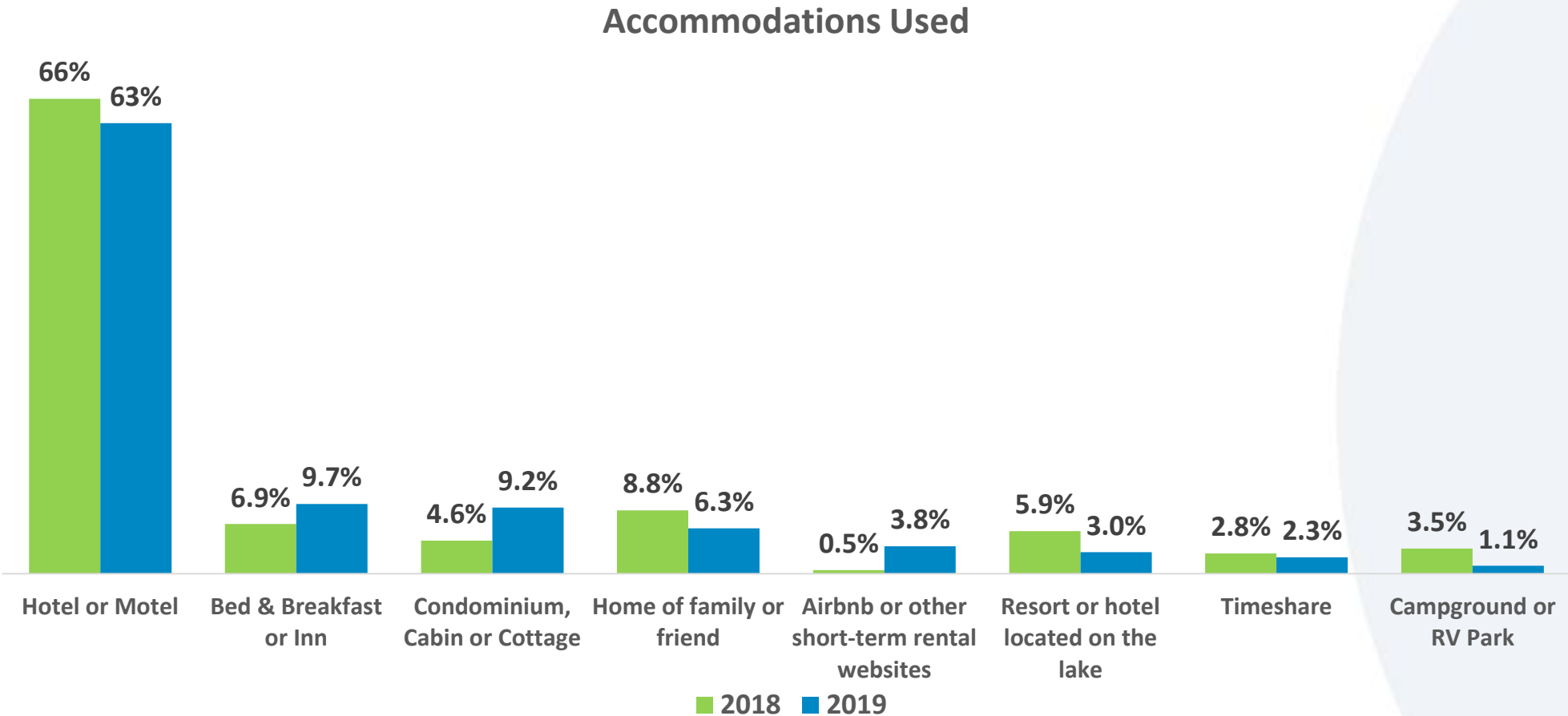
RESPONDENT BASE: ALL OVERNIGHT VISITORS | N=281

Q19: How many nights did you spend in the area on this trip?
Q20: In which of the following cities/areas did you spend the night on your most recent visit to the Springfield area?

Length of stay among those visiting both Springfield and Branson decreased. Visitors continue to spend slightly more time in Branson than Springfield on their visits.



Hotels/Motels are still most popular for Springfield visitors. Although, they were less popular this year with both Condos, B&B's and Airbnb rentals increasing for the second year in a row.

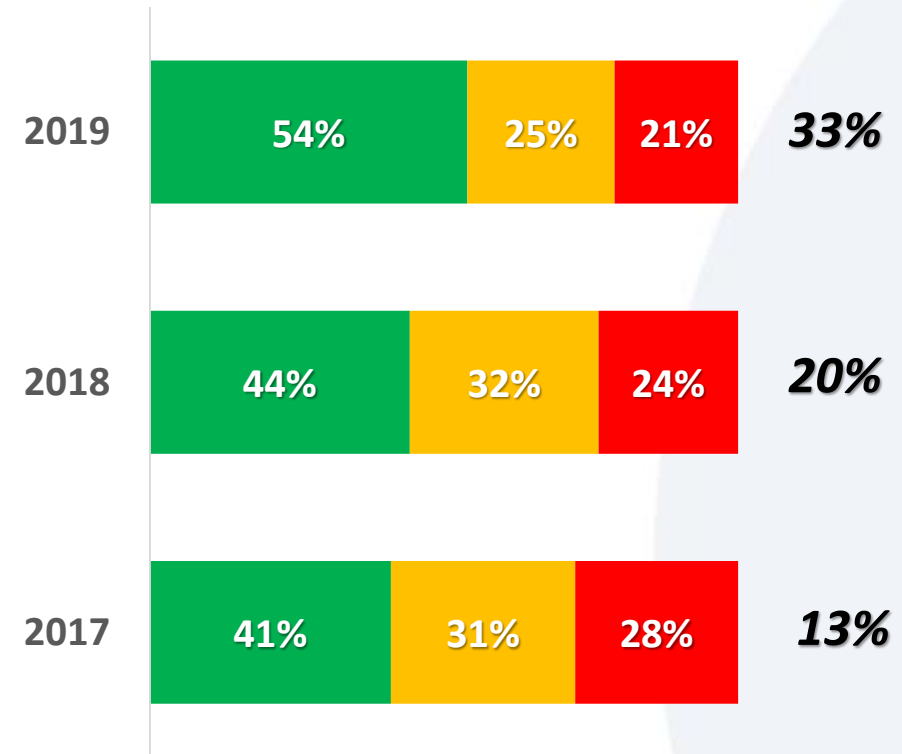


Q22: Which of the following best describes the type of accommodations you used on your most recent trip?

Net Promoter Score

Springfield's Net Promoter Score increased by 13 points this year, bringing the score well above the H2R Norm of 27% for Missouri Destinations, and nearing the Nationwide norm of 35%.

The increase was accomplished by reducing the number of Detractors and increasing the number of Promoters. Neutral visitors also saw a decrease of seven points, moving in the right direction.



■ Promoters (9-10) ■ Neutral (8-9) ■ Detractors (0-6)

Demographic Profile of Springfield Visitors

	Visitors in Past 12 Months	Non-Visitors	Prospects*	Brand Advocates**
Respondent Age	44.5	43.4	37.2	43.5
Children in the Home	40%	39%	52%	48%
No Children	60%	61%	48%	52%
Males	44%	31%	29%	43%
Females	56%	69%	71%	58%
Caucasian or White	83%	77%	66%	84%
African American or Black	8%	12%	18%	5%
Other Ethnicity	12%	15%	20%	14%
HH Income	\$82.1k	\$65.5k	\$60.5k	\$78.5k
Distance	197.0 miles	315.7 miles	301.4 miles	200.3 miles
% College Graduate +	57%	46%	39%	53%

*Prospects are non-visitors who intend to visit the area after viewing the ads.

**Brand Advocates are visitors who rated NPS for Springfield a 9 or 10 and will probably/definitely return.



Springfield 2019 Marketing & Media Effectiveness Research

|Appendix

Net Promoter Score

Net Promoter Score (NPS) is a measurement tool used across industries to evaluate net consumer satisfaction using a single point of accountability. Given the importance of social media and positive word of mouth advertising, travel destinations should monitor their brand advocacy, and the Net Promoter Score is considered one of the best tools for doing so.

HOWEVER, while NPS should be monitored, it should be pointed out that NPS is also one of the most volatile metrics and, more importantly, there is very little that a DMO/STO can do to move the NPS needle upward. No amount of quality marketing can alter a visitor's personal experience at area attractions, restaurants and hotels. Only travel constituents who serve travelers have the power to make this kind of impact.

“How likely are you to recommend each of these destinations to a friend or family member?”



Net Promoter Score = (% Who are Promoters) – (% Who are Detractors)

Thank You!



Reveal Your Customer's Full Experience

Springfield | Branson | Bentonville | Kansas City

www.h2rmarketresearch.com | 417.877.7808

@H2RMktResearch