



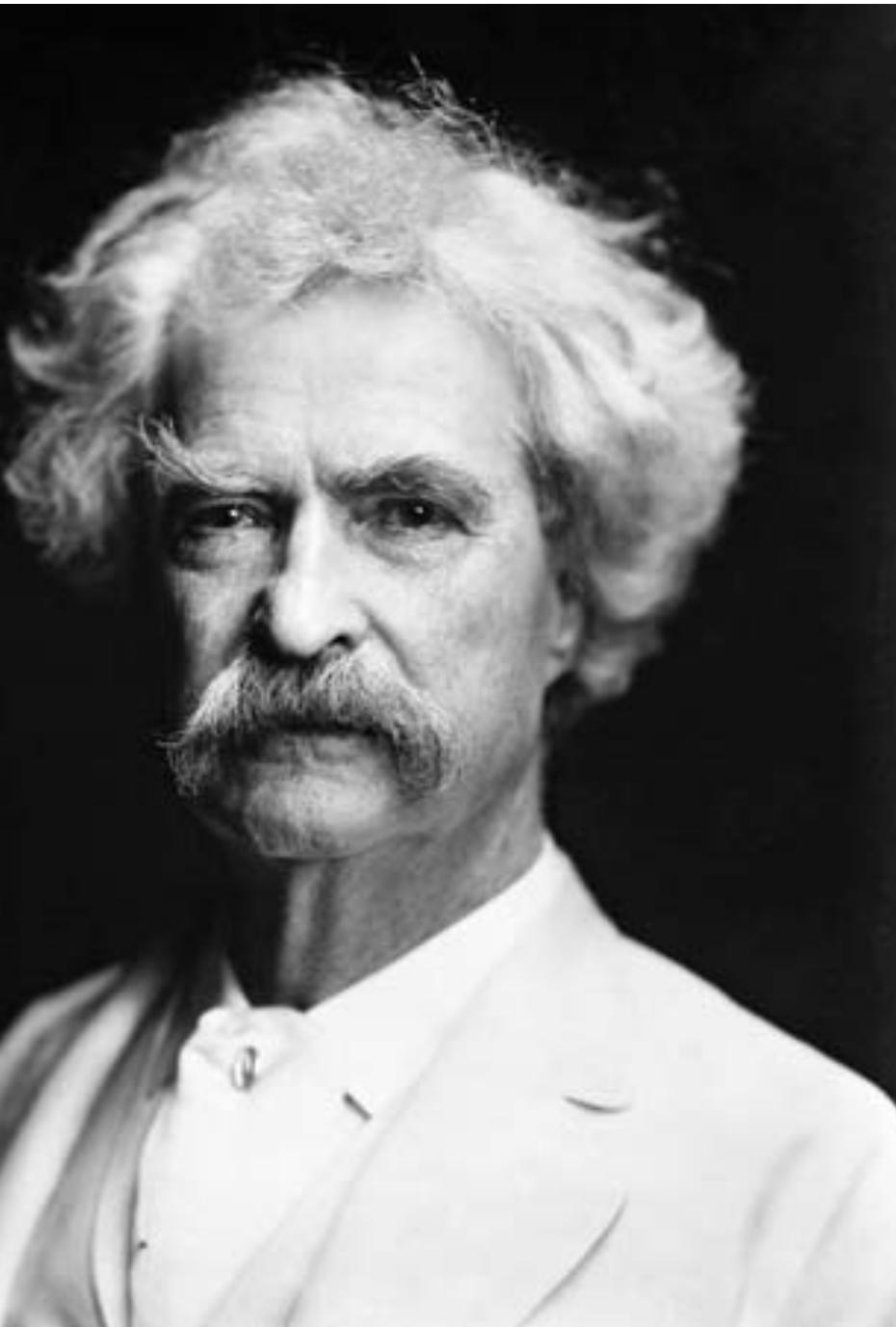
Convention & Visitors Bureau

RESEARCH REVIEW

Prepared by



H2R
MARKET RESEARCH



**“It ain't what you don't know
that gets you into trouble. It's
what you know for sure that
just ain't so.”**

--Mark Twain

Overview

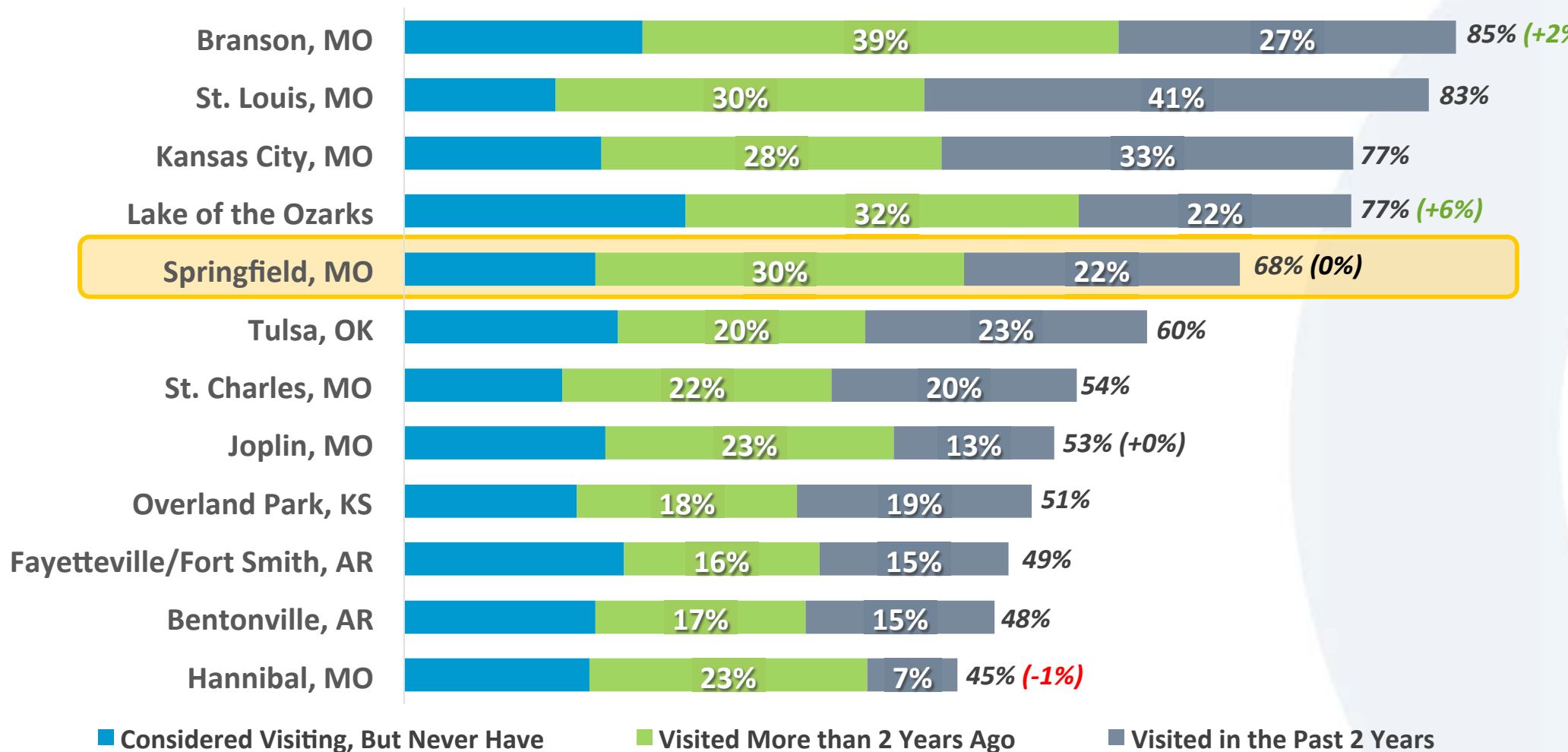
- **Traveler Profile.** *Who* visits Springfield and *when* do they visit? [MMKT]
- **Brand Perception.** *What* do travelers across the region think of Springfield? [BRAND '16]
- **Geographic Target Market.** *Where* do Springfield travelers live? [MULTIPLE]
- **Market Drivers.** *Why* do travelers visit Springfield? [BRAND]
- **Efficiency & Effectiveness of Performance.** *How* is Springfield doing? [MMKT]

Traveler Profile

WHO visits Springfield and WHEN do they visit?

01

More than half of travelers in the target market have visited Springfield, and combined with the 16% who have considered, the potential market pool totals more than two-thirds of the market place.

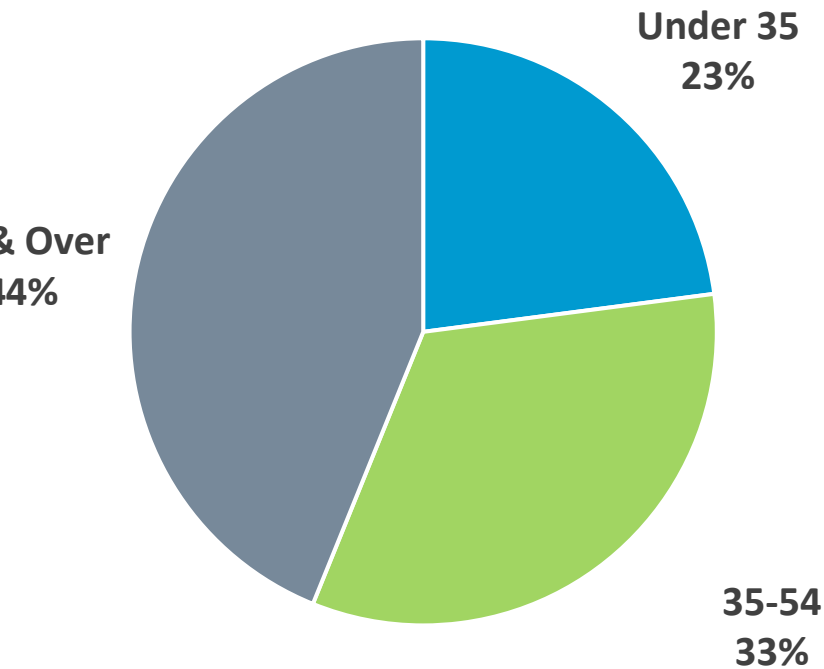


E: Springfield Marketing & Media Effectiveness Study, H2R Market Research
 Please indicate your awareness and prior visitation of the following area destinations:

RESPONDENT BASE: 2016 PANEL RESPONDENTS |
 2014 PANEL RESPONDENTS |

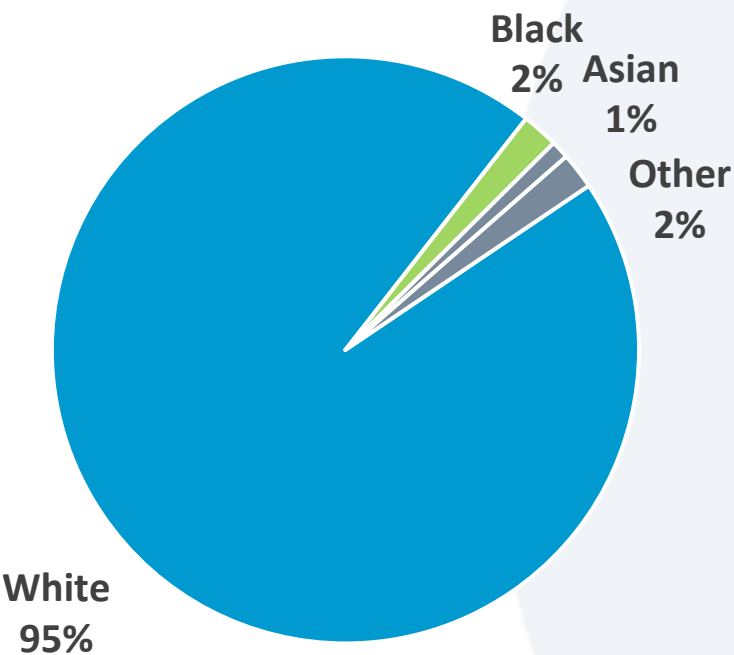
Springfield visitors average nearly 50 years of age and are mostly Caucasian

Age of Visitors



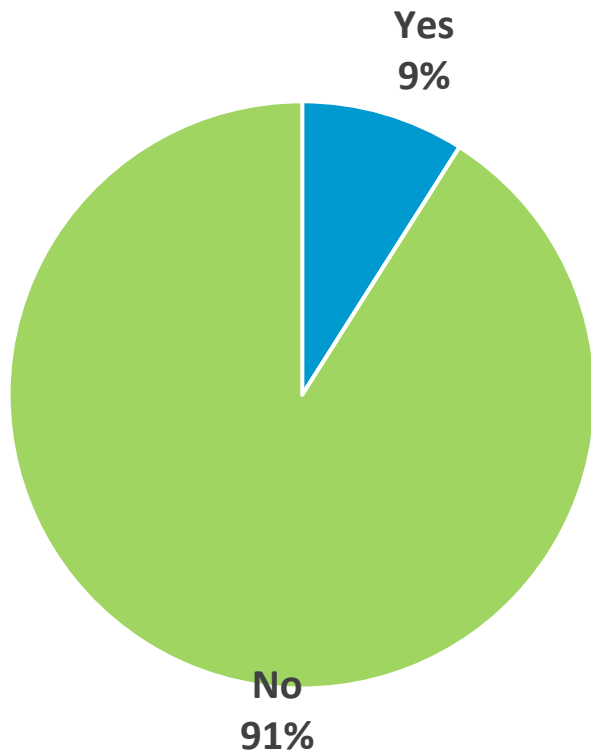
Average Adult Age: 49.8 years

Ethnicity of Visitors



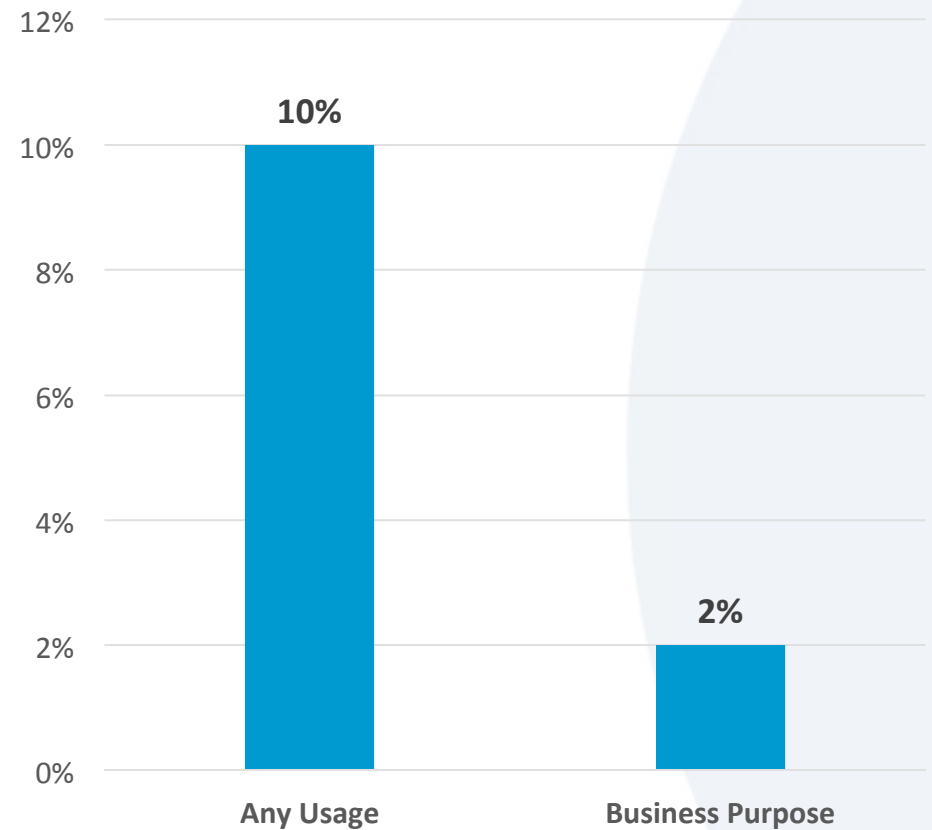
Nearly one in ten Springfield visitors have used Sharing Services, but that ratio drops to 2% among business travelers

Use of Sharing Economy Services



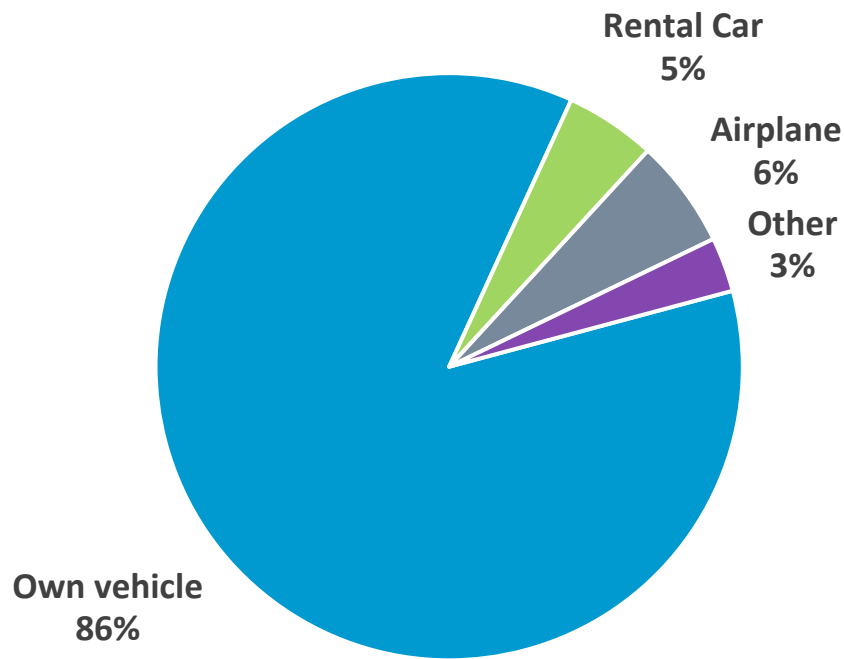
Average Adult Age: 49.8 years

Trip Purpose Using Shared Services

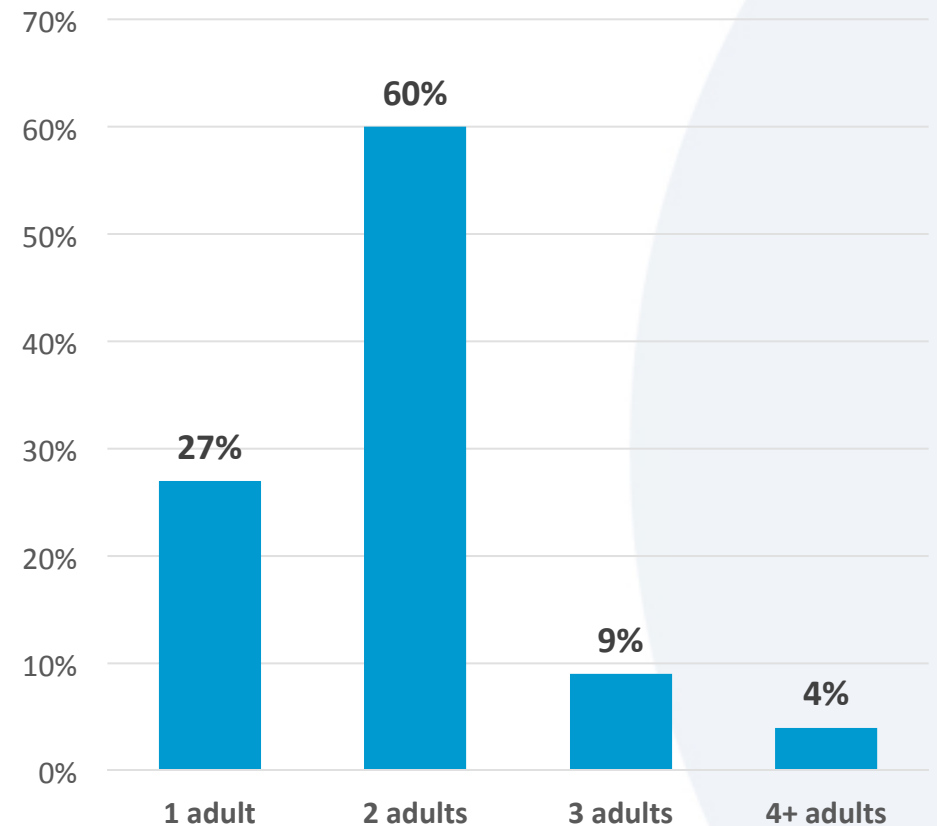


Springfield is primarily a rubber tire destination and most parties are comprised of 1-2 adults.

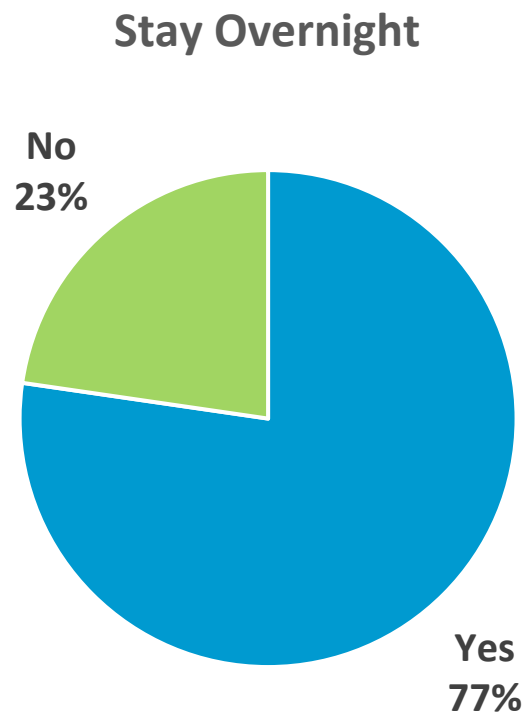
Primary Method of Transportation



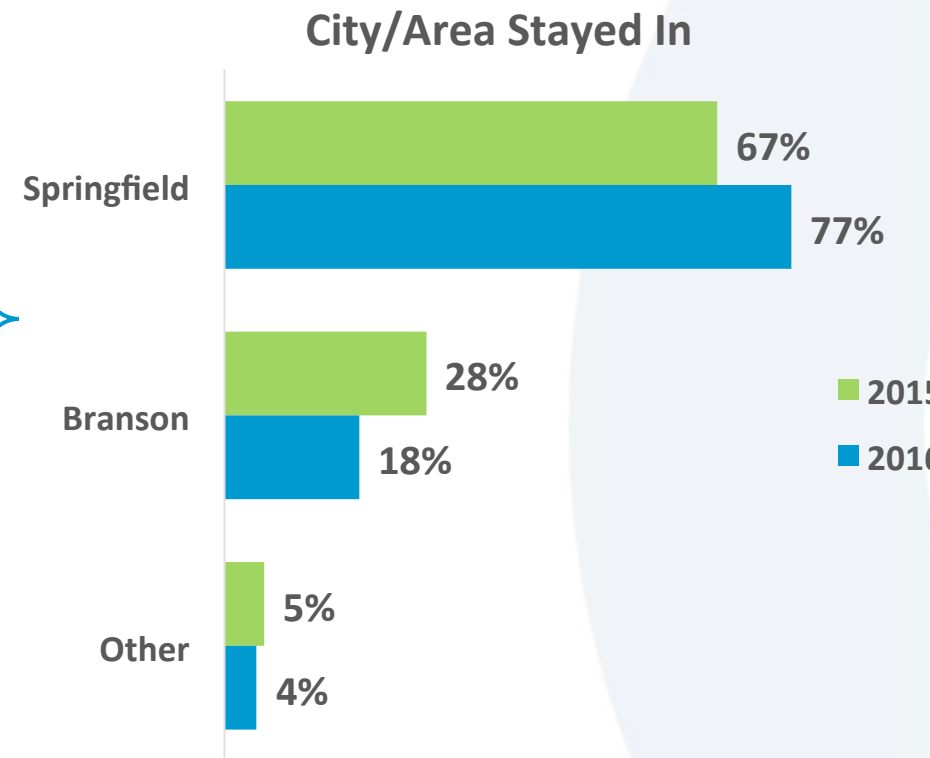
Number of Adults in Party



Most (77%) Springfield travelers spend the night and most of those stay in Springfield.



3.3
Nights in
Springfield



RESPONDENT BASE: SPRINGFIELD VISITORS LAST 3 YEARS | N=302

RESPONDENT BASE: ALL OVERNIGHT VISITORS | N=266

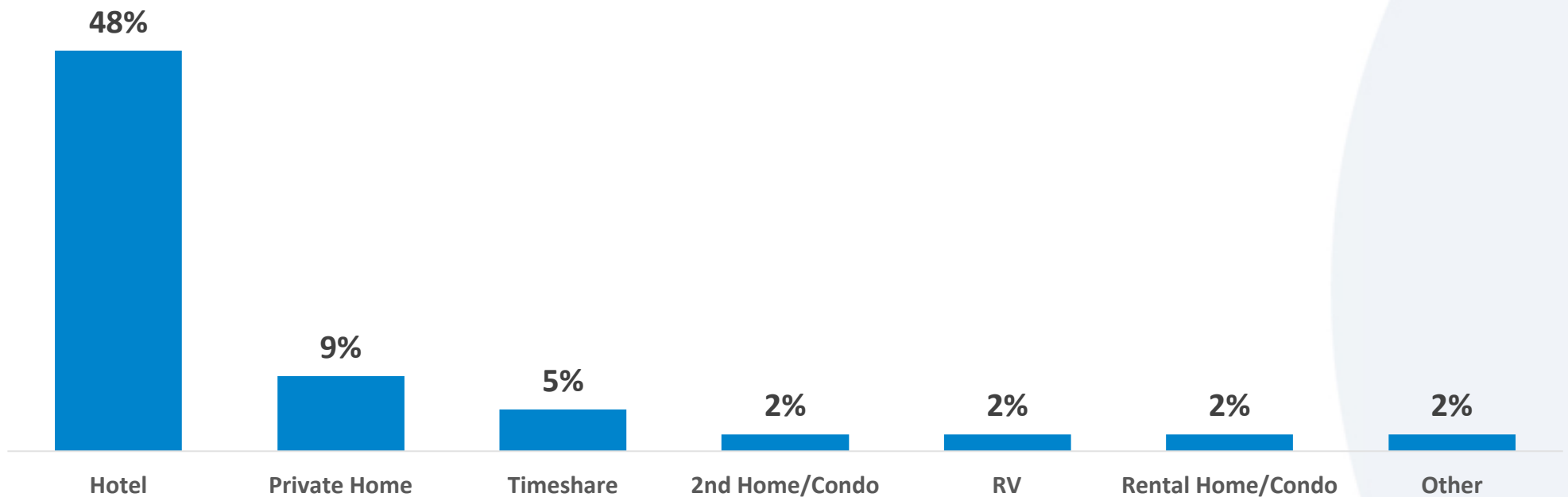
Springfield Marketing & Media Effectiveness Study, H2R Market Research

How many nights did you spend in the area on this trip?

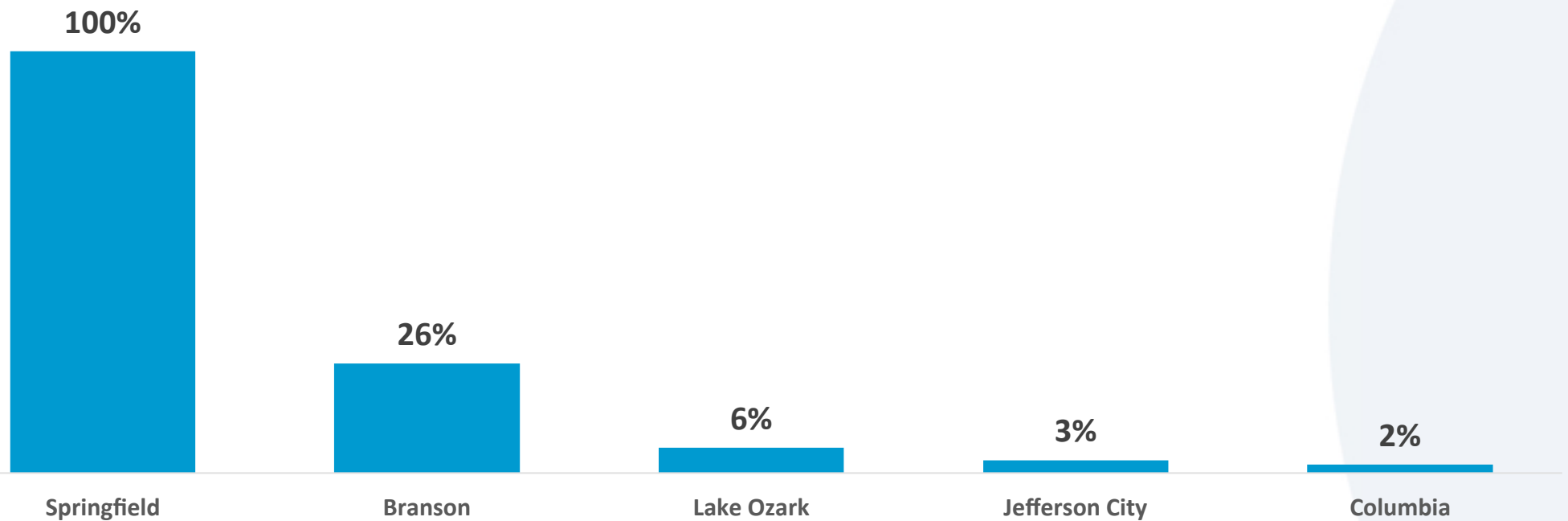
Which of the following cities/areas did you spend the night on your most recent visit to the Springfield area?

The majority of Springfield visitors stay at a hotel or private home when they visit the area.

Accommodations Used

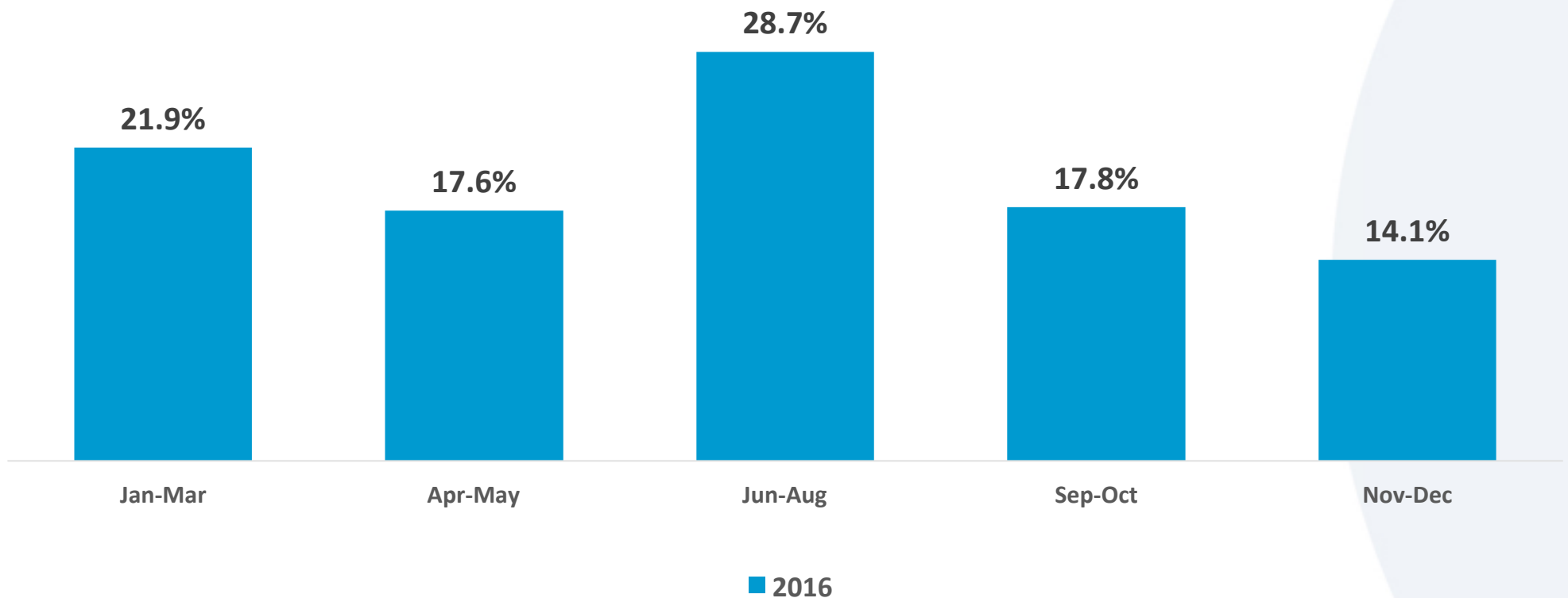


More than one-quarter (26%) of Springfield travelers also visit Branson during their trip to the area.



Like most destinations, Springfield's peak season falls in the summer months between June and August.

Season of Springfield's Overnight Room Demand



Demographic Profile of Springfield Visitors

	Visitors in Past 12 Months	Non-Visitors	Prospects*	Brand Advocates**
Children in the Home	65%	50%	66%	71%
No Children	35%	50%	34%	29%
Males	46%	33%	37%	49%
Females	54%	67%	63%	51%
Caucasian or White	93%	81%	74%	93%
African American or Black	1%	9%	15%	3%
Other Ethnicity	6%	10%	11%	4%
HH Income	\$83.4k	\$66.4k	\$71.8k	\$88.4k
Distance	231 miles	334 miles	334 miles	255 miles
% College Graduate +	60%	45%	43%	67%

*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.

Brand Perception

HAT do travelers across the region think of Springfield?

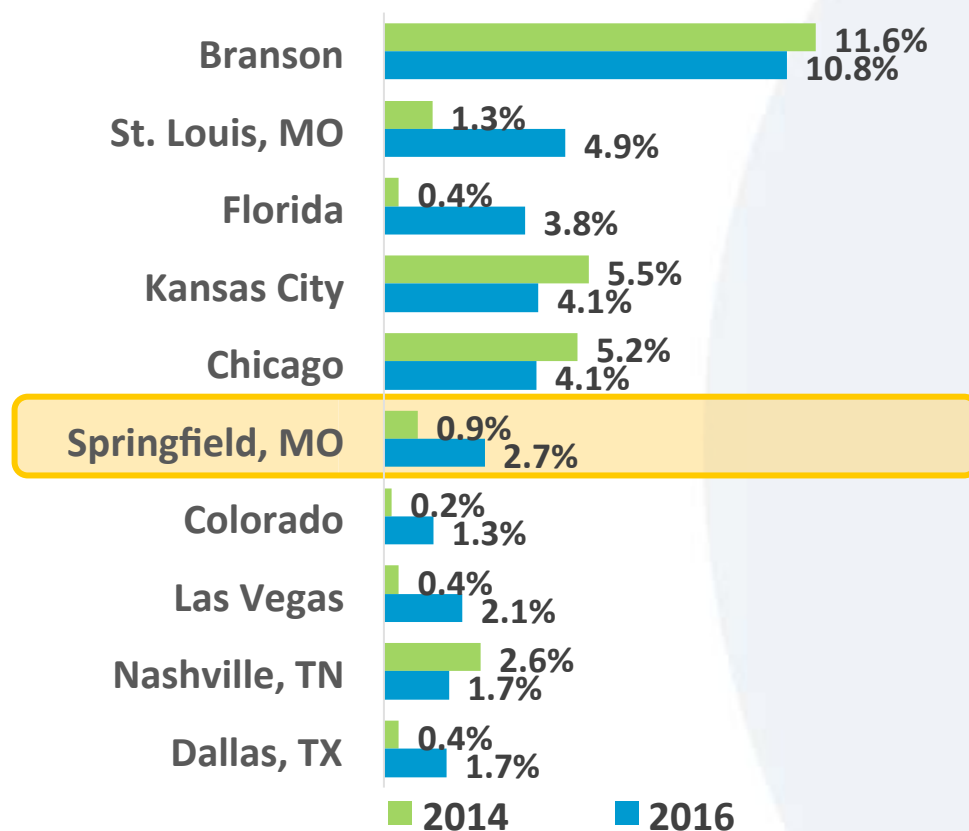
02

Unaided traveler awareness of Springfield increased three-fold since 2014, ascending from 11th to 6th.

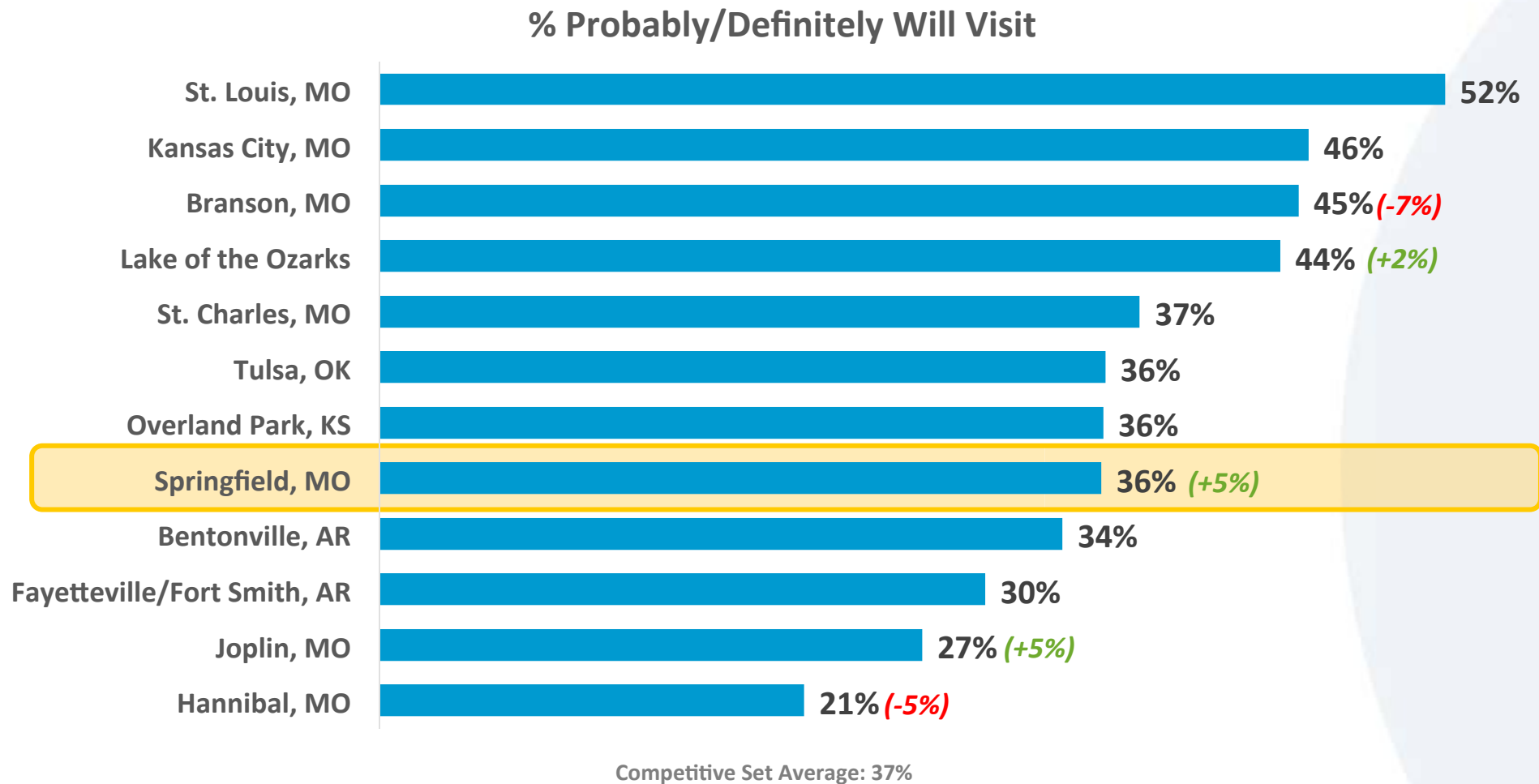
Unaided Destinations – Any Mention



Any Mention of Destinations



More than one-third (36%) of regional travelers exhibit a desire to visit Springfield in the next 12 months.

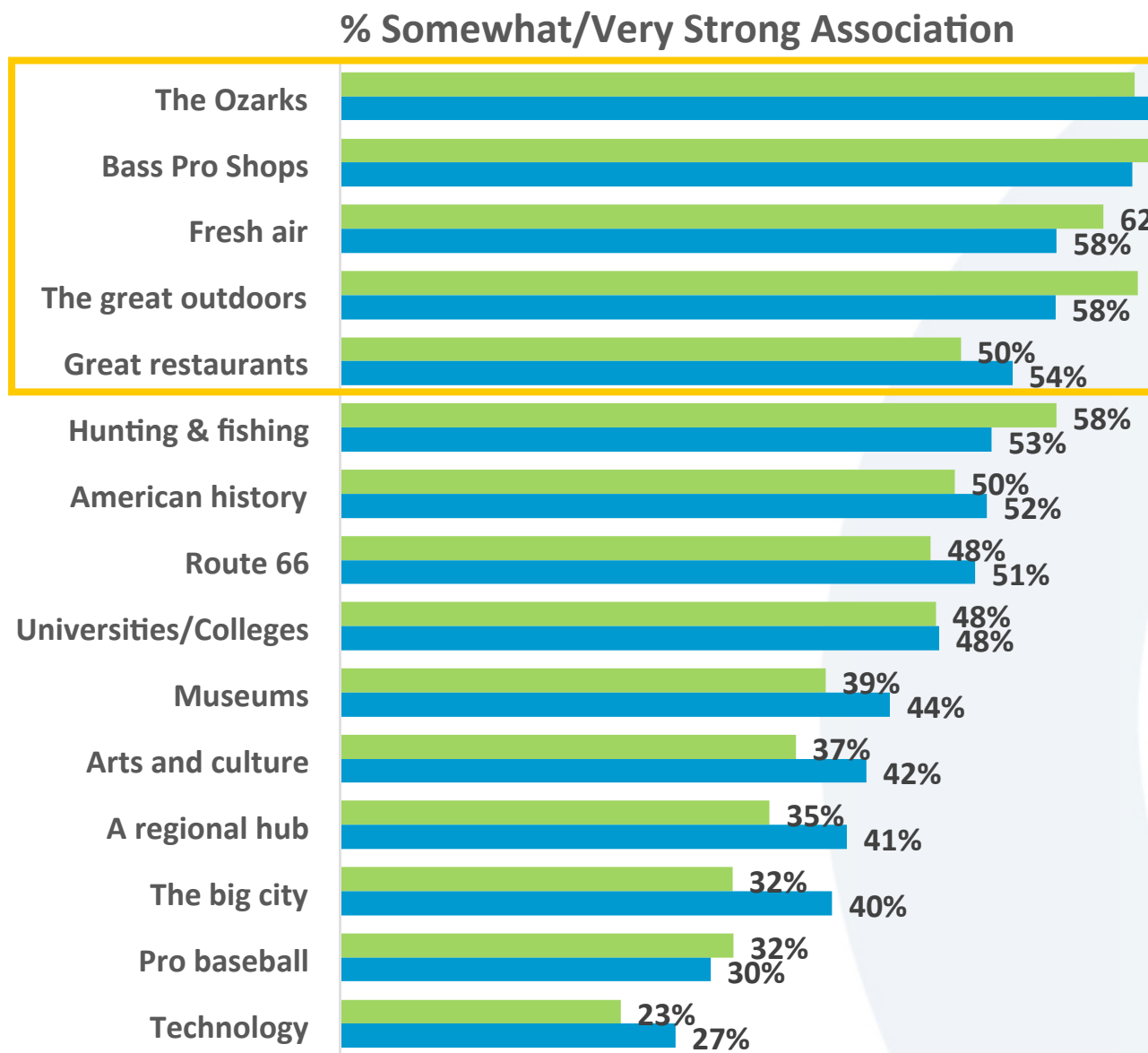


E: Springfield Brand Perception Study, H2R Market Research
ing the scale provided, please indicate how likely you are to visit each of the following
ations in the next 12 months.

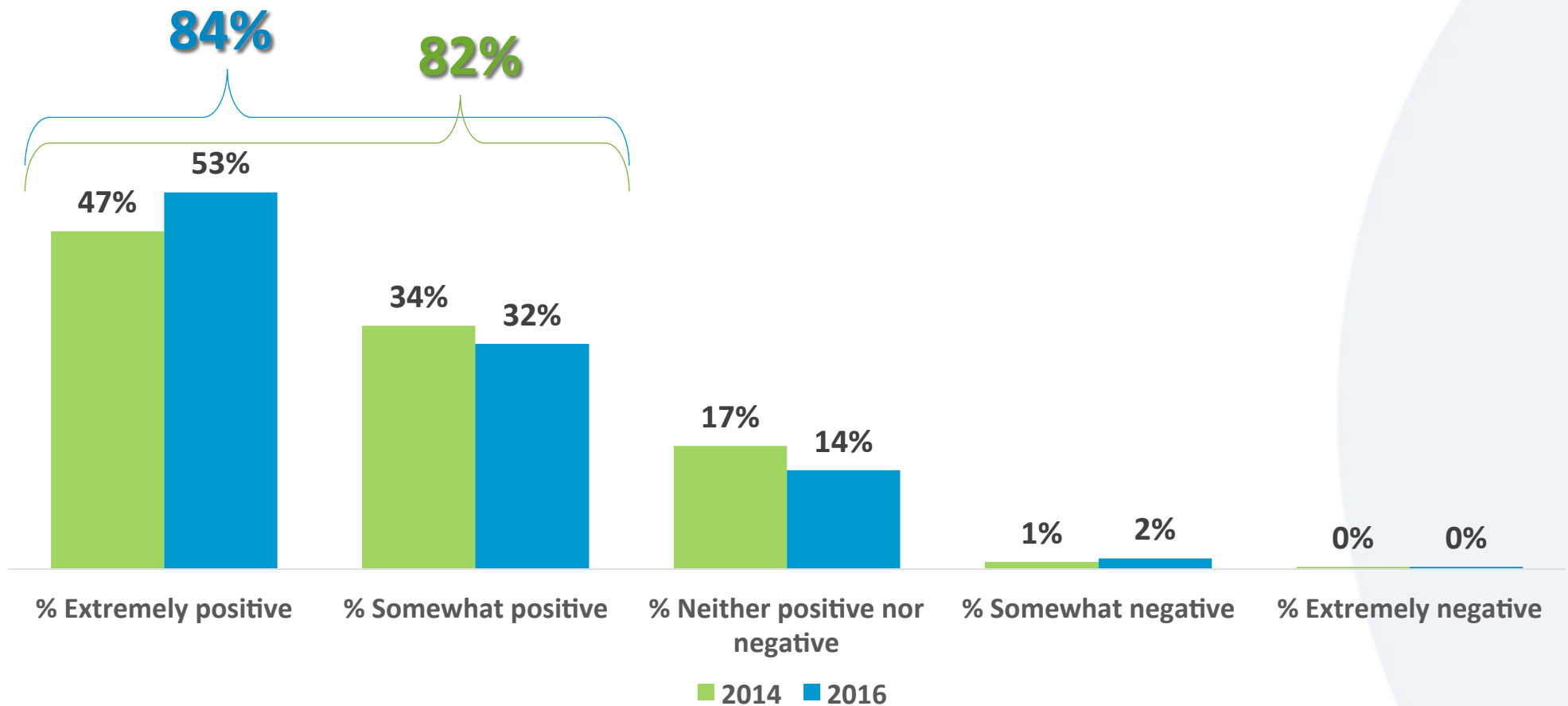
RESPONDENT BASE: 2016 PANEL RESPONDENTS FAMILIAR W/ SPRINGFIELD |
2014 PANEL RESPONDENTS FAMILIAR W/ SPRINGFIELD |

While activities and attributes such as The Ozarks, Bass Pro Shops and Fresh air still resonate the most among travelers, others experienced increases compared to 2014.

Springfield is seeing a much stronger association this year with The big city (+8%), A regional hub (+6%), Arts and culture (+6%), Technology (+4%) and Great restaurants (+4%).



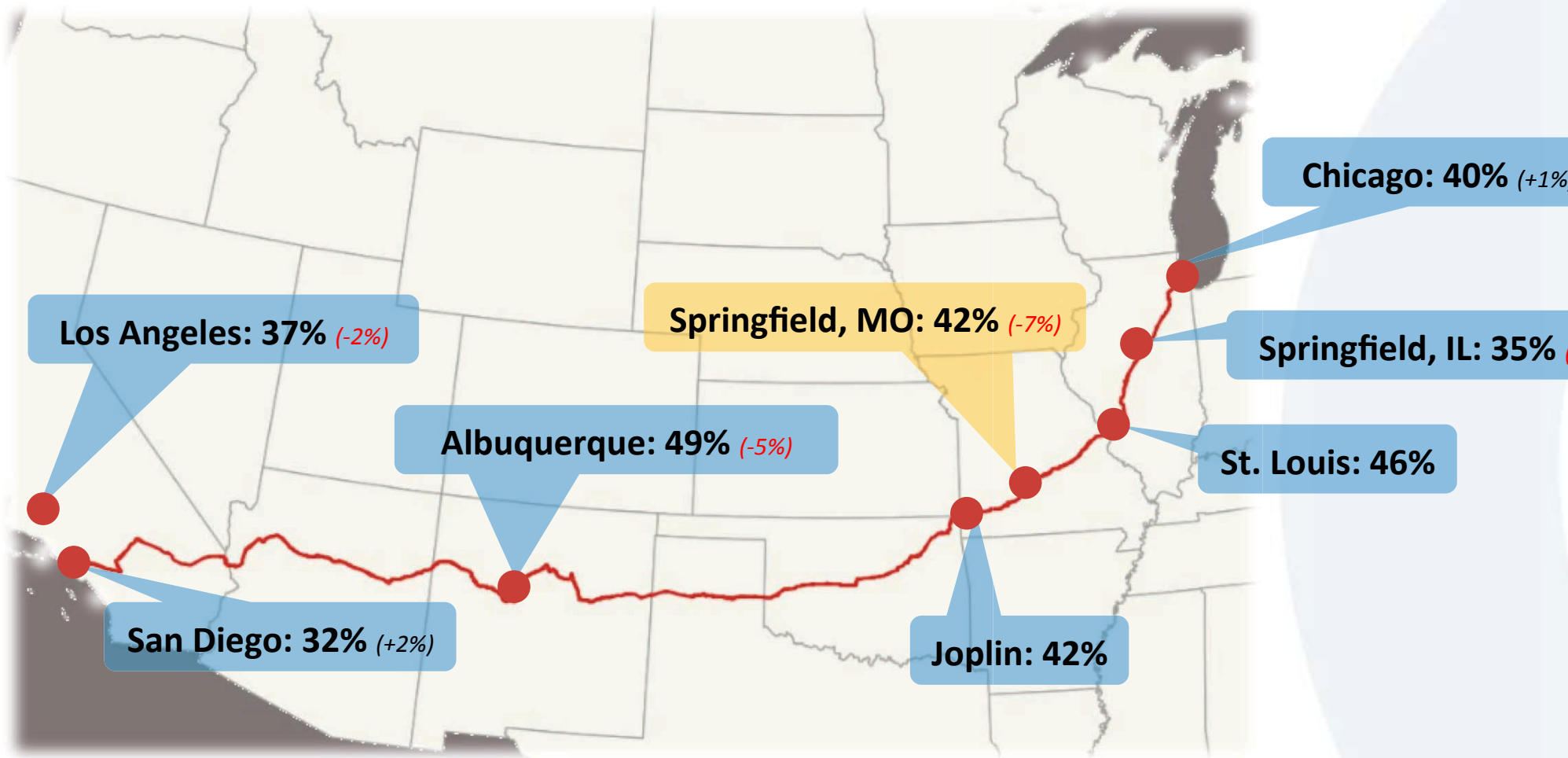
The attitude toward “The Ozarks” is quite positive and has improved slightly in recent years.



E: Springfield Brand Perception Study, H2R Market Research
Using the scale provided, please tell us which of the following best describes your attitude toward "The Ozarks."

RESPONDENT BASE: 2016 RESPONDENTS FAMILIAR W/ SPRINGFIELD |
2014 RESPONDENTS FAMILIAR W/ SPRINGFIELD |

More than 4 in 10 travelers associate Springfield with Route 66, but this is down somewhat from previous measures.

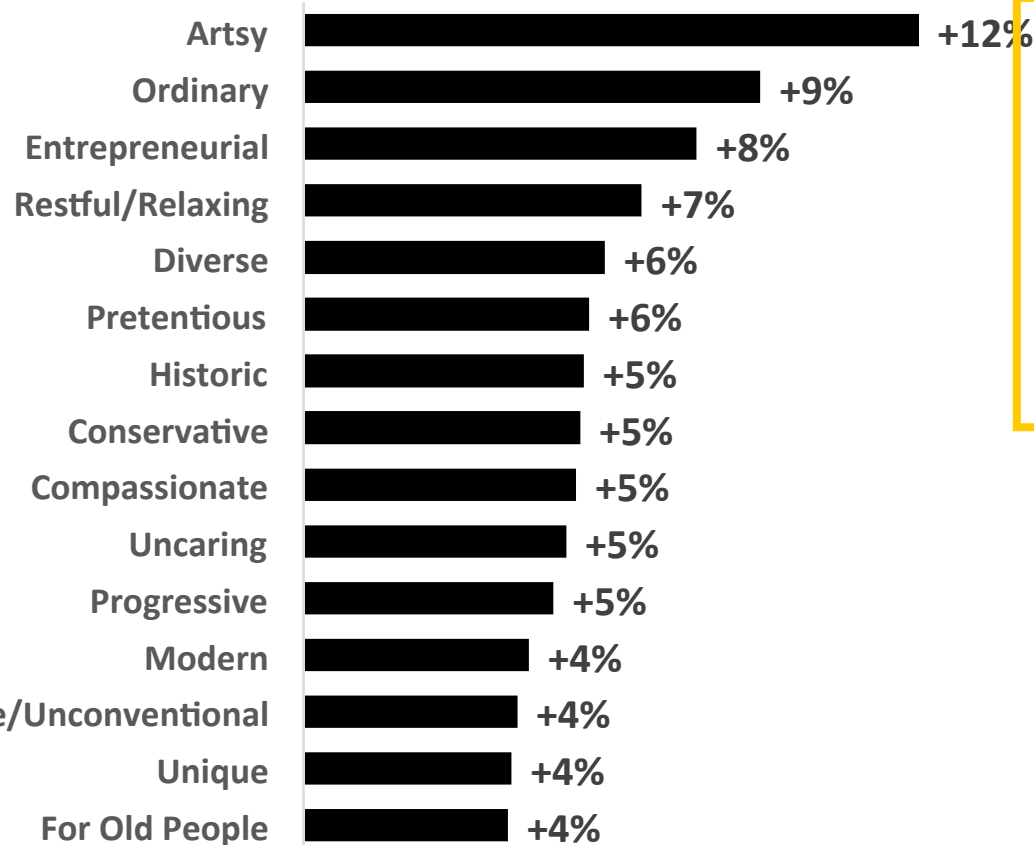


E: Springfield Brand Perception Study, H2R Market Research
ing the scale provided, please rate the degree to which you associate each of the
ng cities with the legendary U.S. highway Route 66.

RESPONDENT BASE: 2016 PANEL RESPONDENTS FAMILIAR W/ SPRINGFIELD |
2014 PANEL RESPONDENTS FAMILIAR W/ SPRINGFIELD |

Since 2014, Springfield is perceived as becoming more Artsy, Ordinary, Entrepreneurial and Relaxing.

Most Significant Changes from 2014



Top Characteristics 2016



Family Friendly
73%



Casual
73%



Affordable
69%



Accessible
69%



Down to Earth
69%

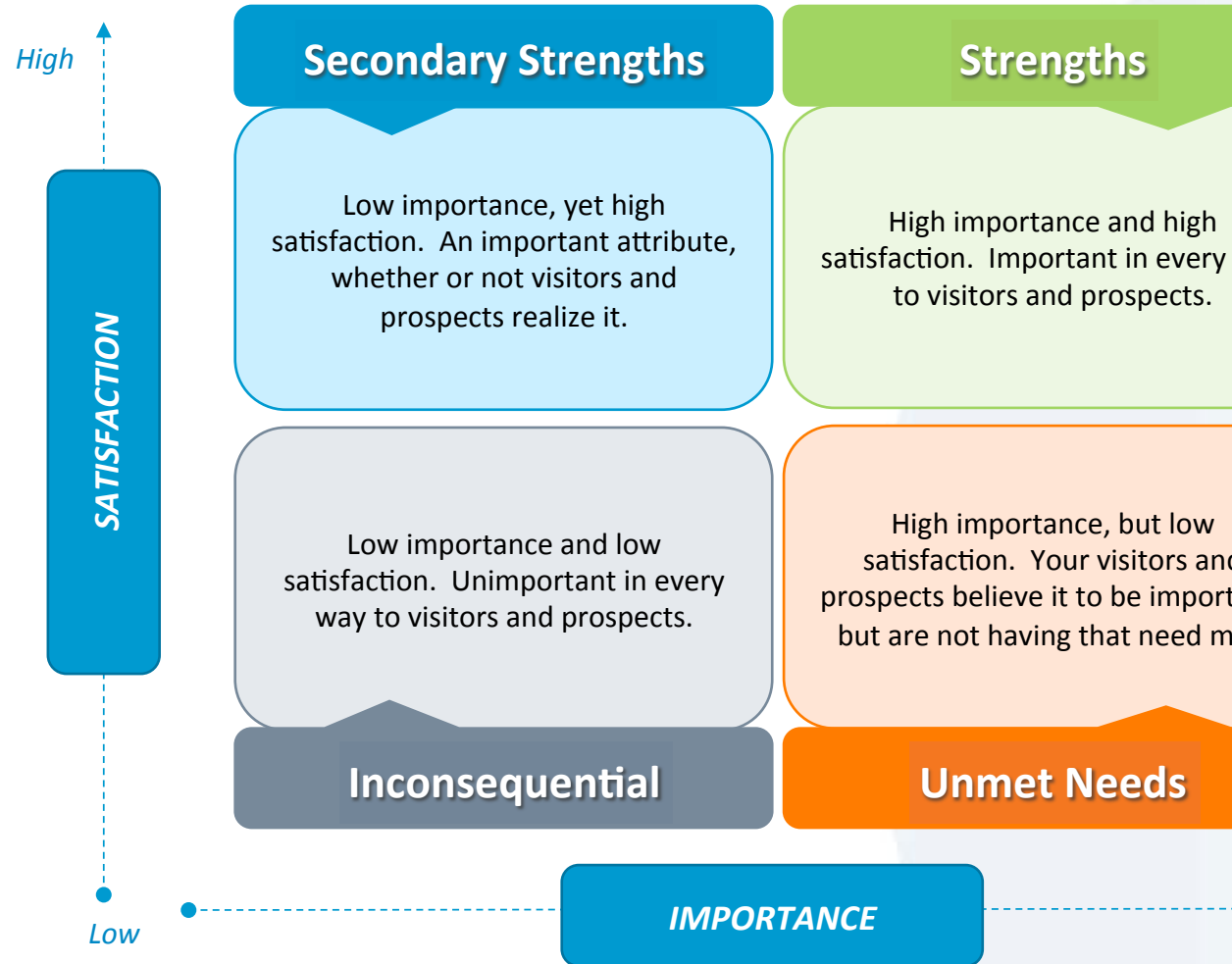


Historic
68%

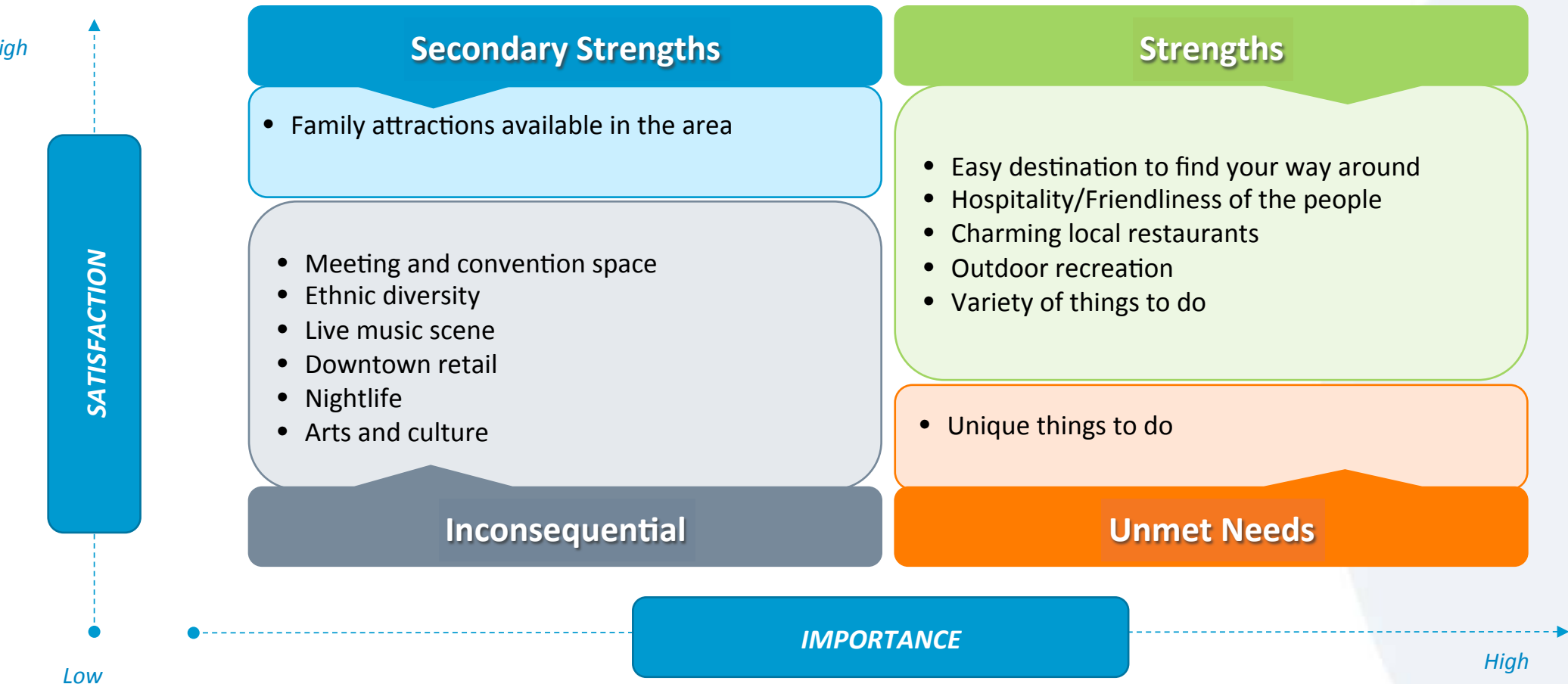
Identifying Brand Strengths & Unmet Needs

Attribute of Springfield has been identified and segmented into four buckets in the chart to the right. This analysis identifies the relative importance of each attribute of the brand alongside visitors' satisfaction with each attribute as it relates to Springfield.

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



Springfield's only unmet need among leisure travelers is unique things to do which moved from secondary strengths in 2014.



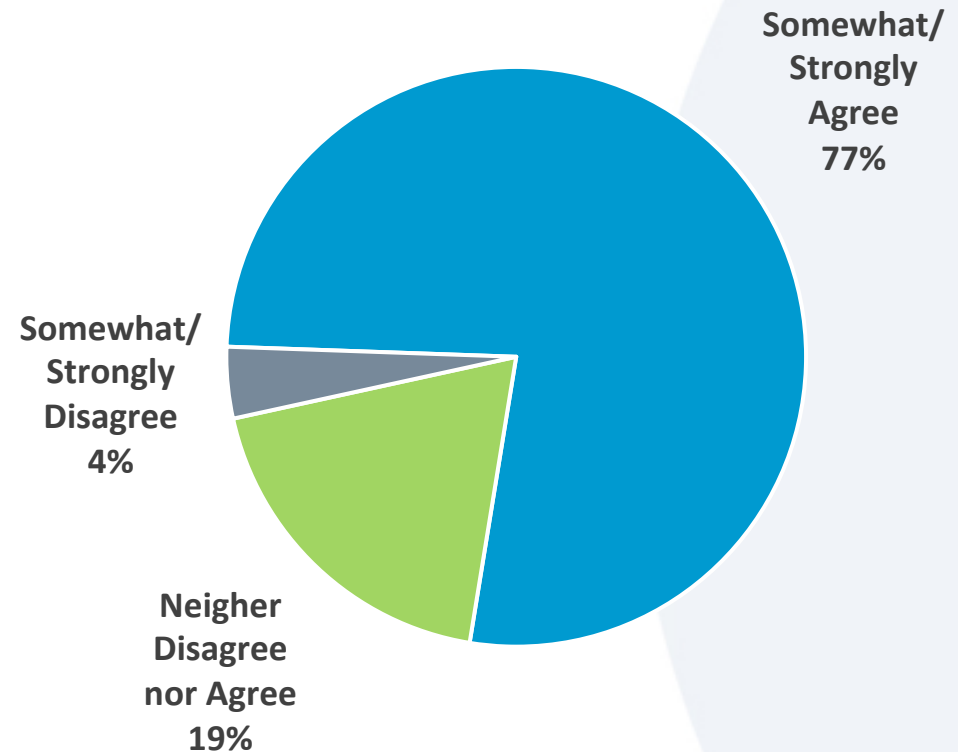
E: Springfield Brand Perception Study, H2R Market Research
Using the scale provided, please rate how satisfied you were with following
characteristics of Springfield, MO as a travel destination.

RESPONDENT BASE: 2016 RESPONDENTS VISITED SPRINGFIELD |

Most (77%) visitors feel that Springfield is delivering upon its brand promise.

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



Springfield's Brand Promise IS: "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." Please rate how much you agree or disagree with how well Springfield is doing to deliver upon their brand promise.

RESPONDENT BASE: 2016 RESPONDENTS VISITED SPRINGFIELD |

Geographic Target Market

WHERE do Springfield's target travelers live?

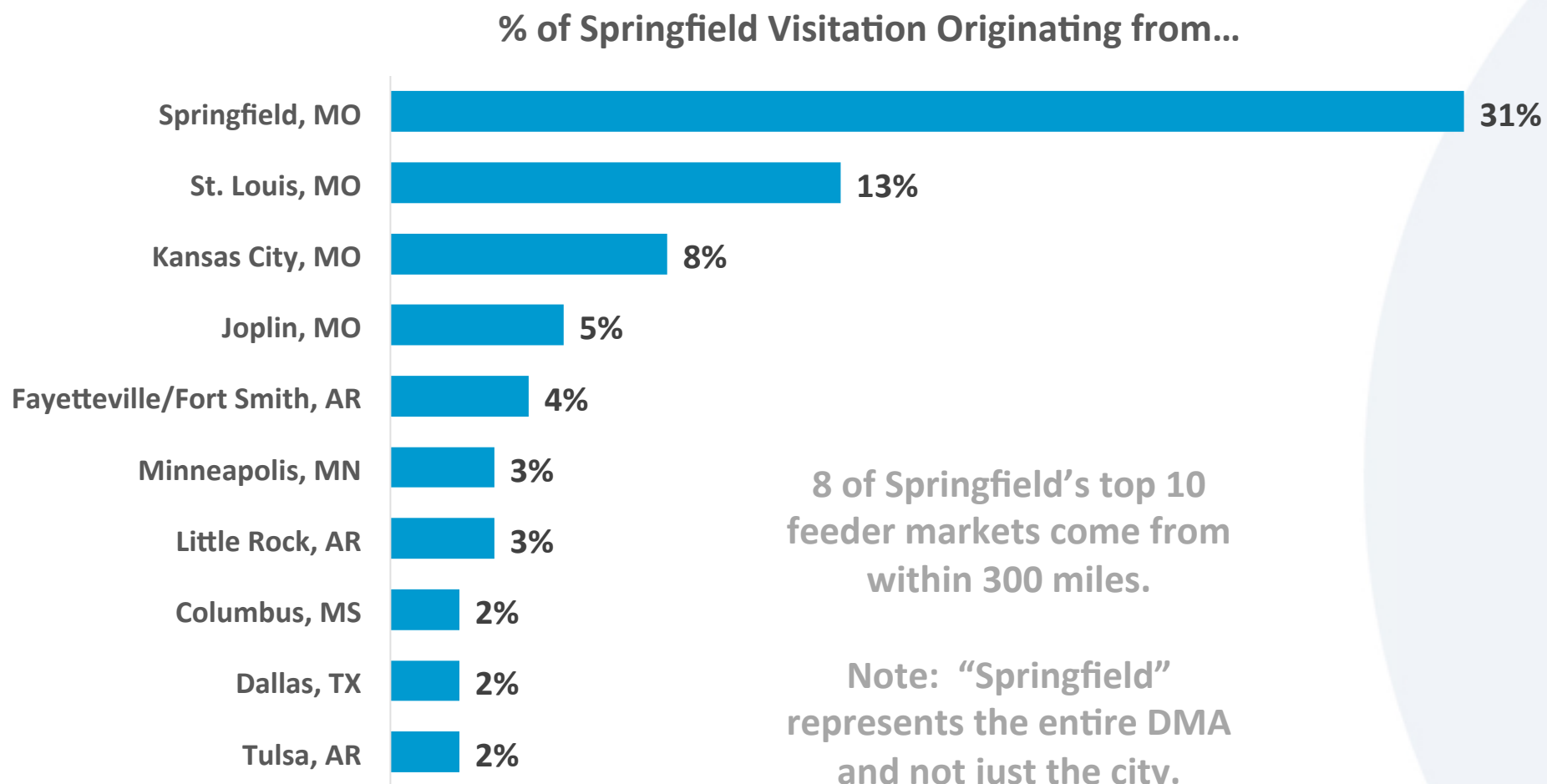
03

Advertised Markets



- The sample for the 2016 Marketing & Media Effectiveness study was garnered from 3 States (Kansas, Oklahoma & Arkansas) as well as a radius of 50-500 miles from Springfield commensurate with how the marketing was placed. However, in order to represent travelers from all distances fairly and appropriately, the results in this study were also weighted by market tier. Tier 1: 0-50 miles, Tier 2: 51-150 miles, Tier 3: 151-225 miles, Tier 4: 226-400 miles and Tier 5: 401-500 miles.
- Results from each tier were weighted commensurate with household population to provide an overall weighted average reflective of the aggregate travel population across the advertised markets. This means that those market areas with larger populations receive a heavier weight than markets with smaller populations.

Most Springfield visitors come from within a 300 mile region.



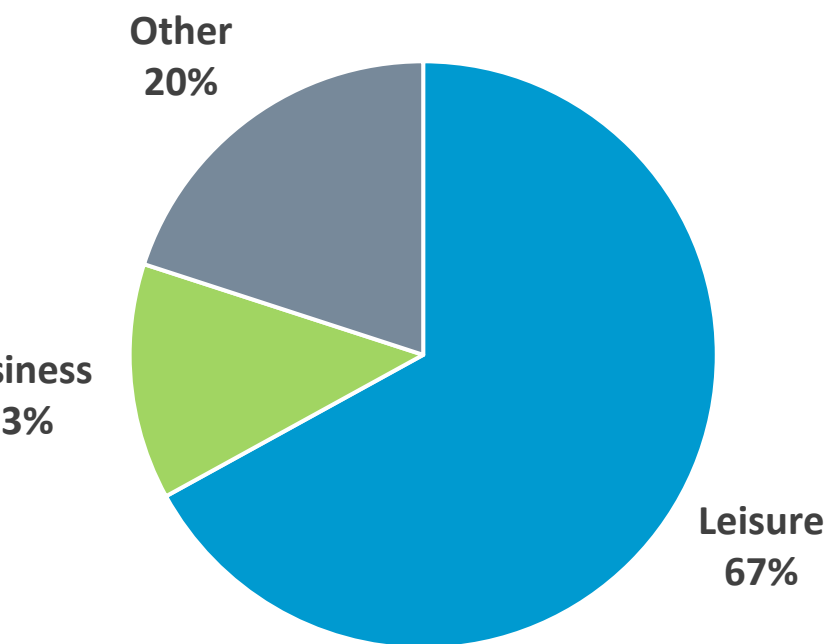
Market Drivers

WHY do travelers visit Springfield?

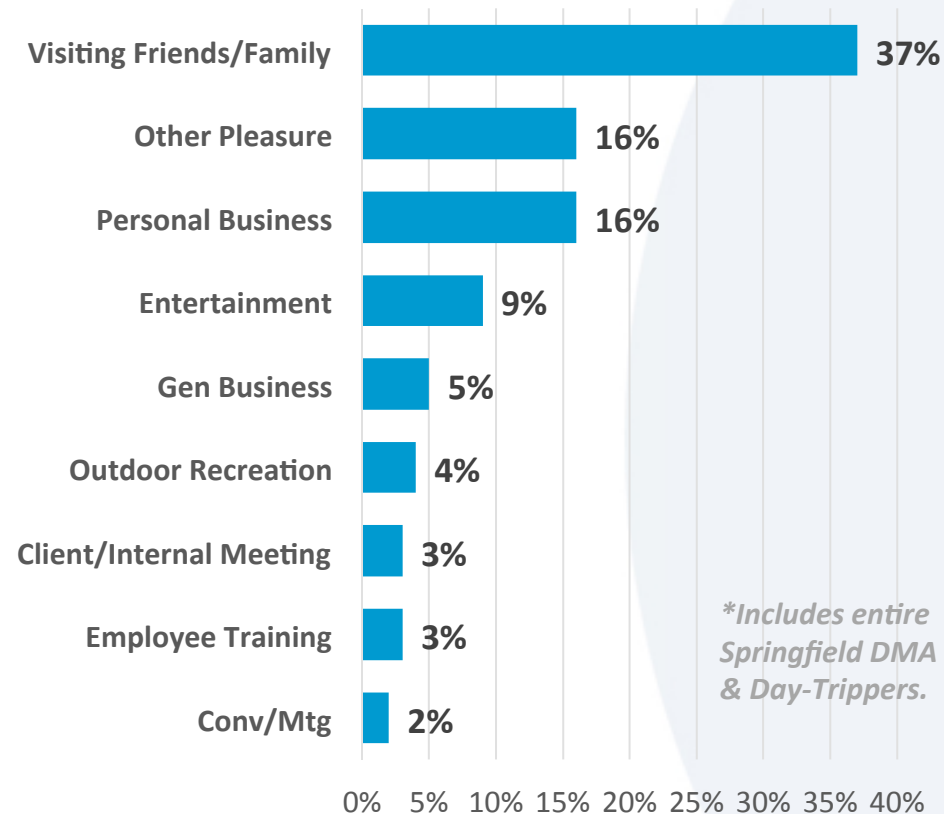
04

Most travelers visit Springfield for leisure purposes

Purpose for Visiting (NET Categories)



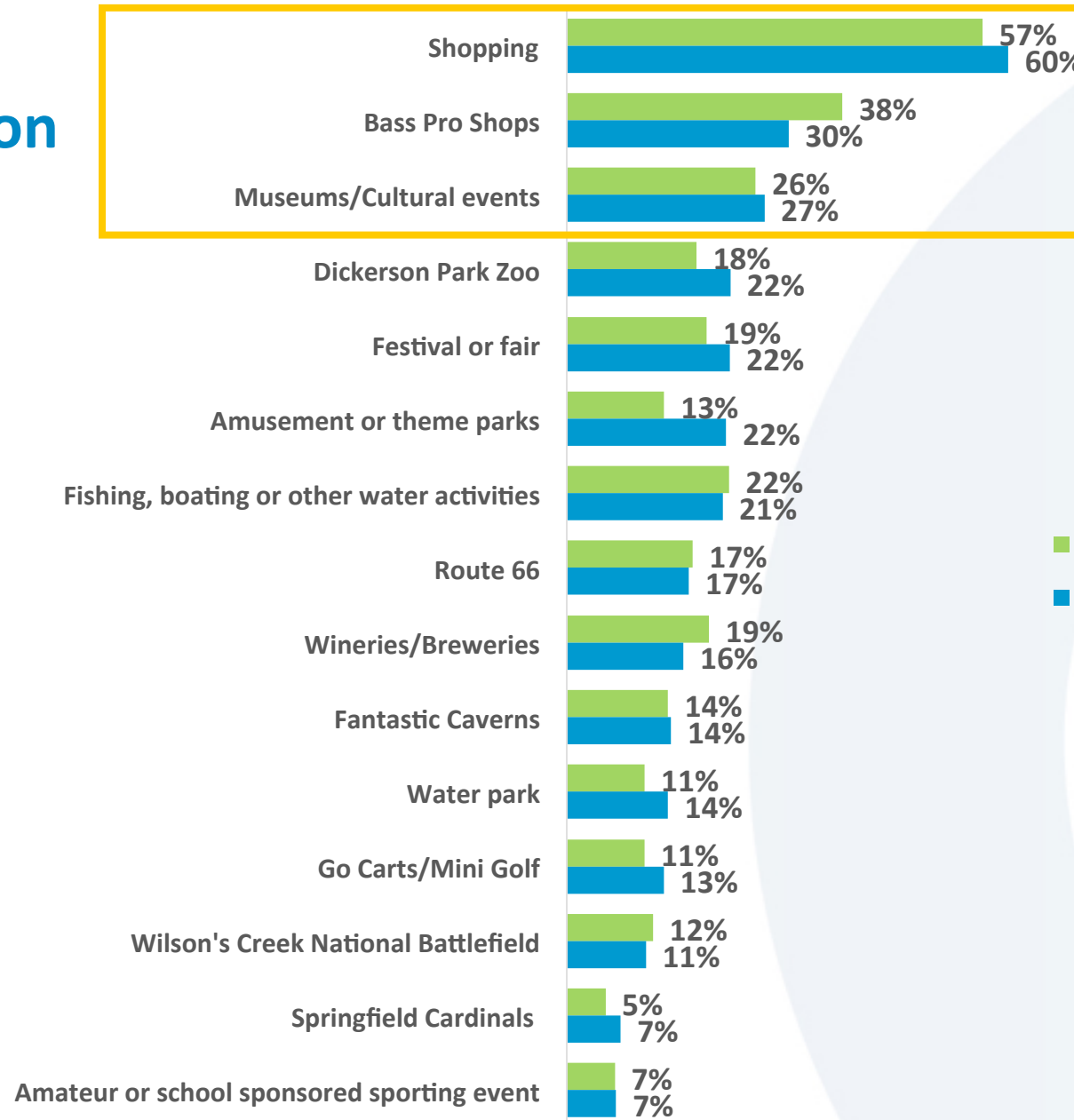
Trip Purpose



Specific Activity Participation

Shopping & Bass Pro Shops continue to be travelers' most popular places to visit in Springfield.

The Dickerson Park Zoo, Amusement Parks and Shopping all saw noted increases in participation compared to last year as well.



The same top activities that were participated in this year are the ones that drove visitation to Springfield this year.



Shopping

40%



Bass Pro Shops

17%

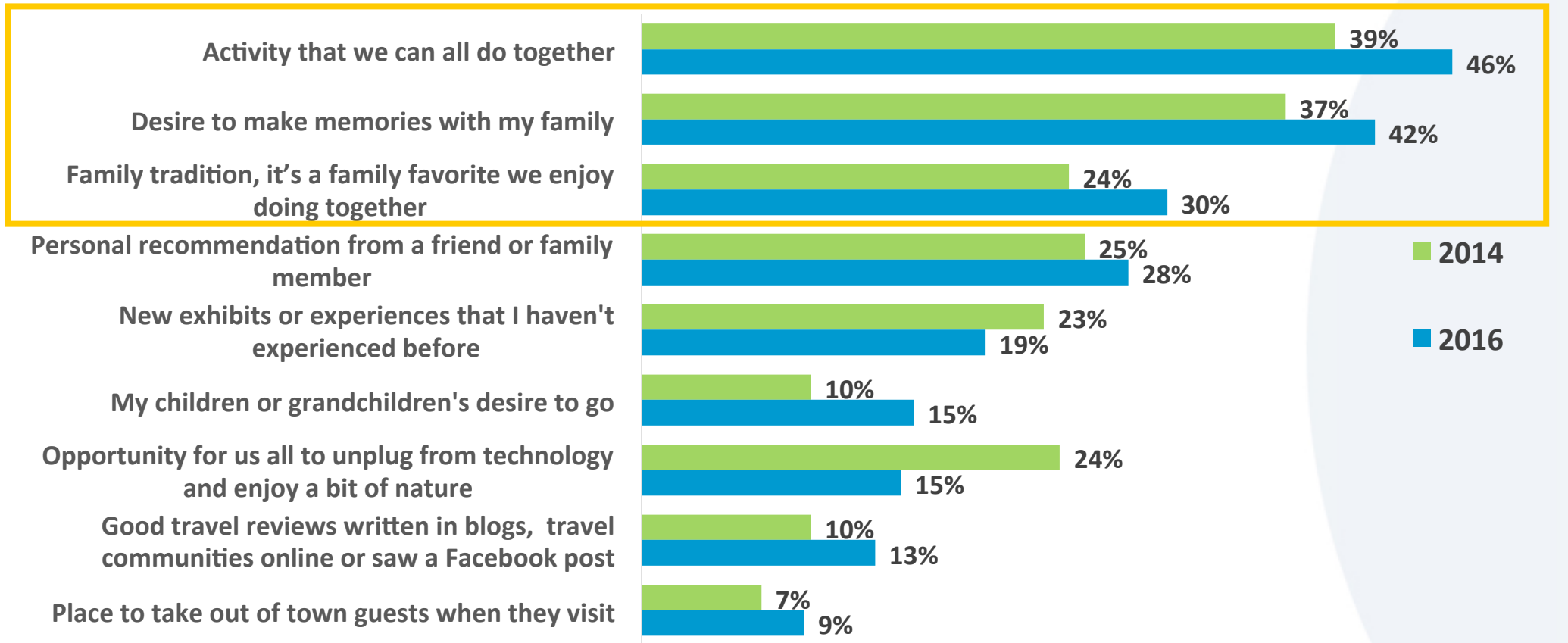


Museums/Cultural Events

17%

The chance to spend time together with family continues to be the primary emotional driver of visitation to Springfield.

Emotional Drivers of Visitation



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

RESPONDENT BASE: 2016 RESPONDENTS VISITED SPRINGFIELD FOR LEISURE |
2014 RESPONDENTS VISITED SPRINGFIELD FOR LEISURE |

Unaided Hurdles

Many of the usual “excuses” for not visiting were offered (time, money, health). However, there were also some other reasons for not visiting including offerings in other destinations and being unaware of what Springfield has to offer.

MORE OFFERED ELSEWHERE

“Bigger cities of KC and St Louis have more to offer”

NOT AWARE OF WHAT’S THERE

“Didn't know they had anything special to offer”

STOPOVER TO SOMEWHERE ELSE

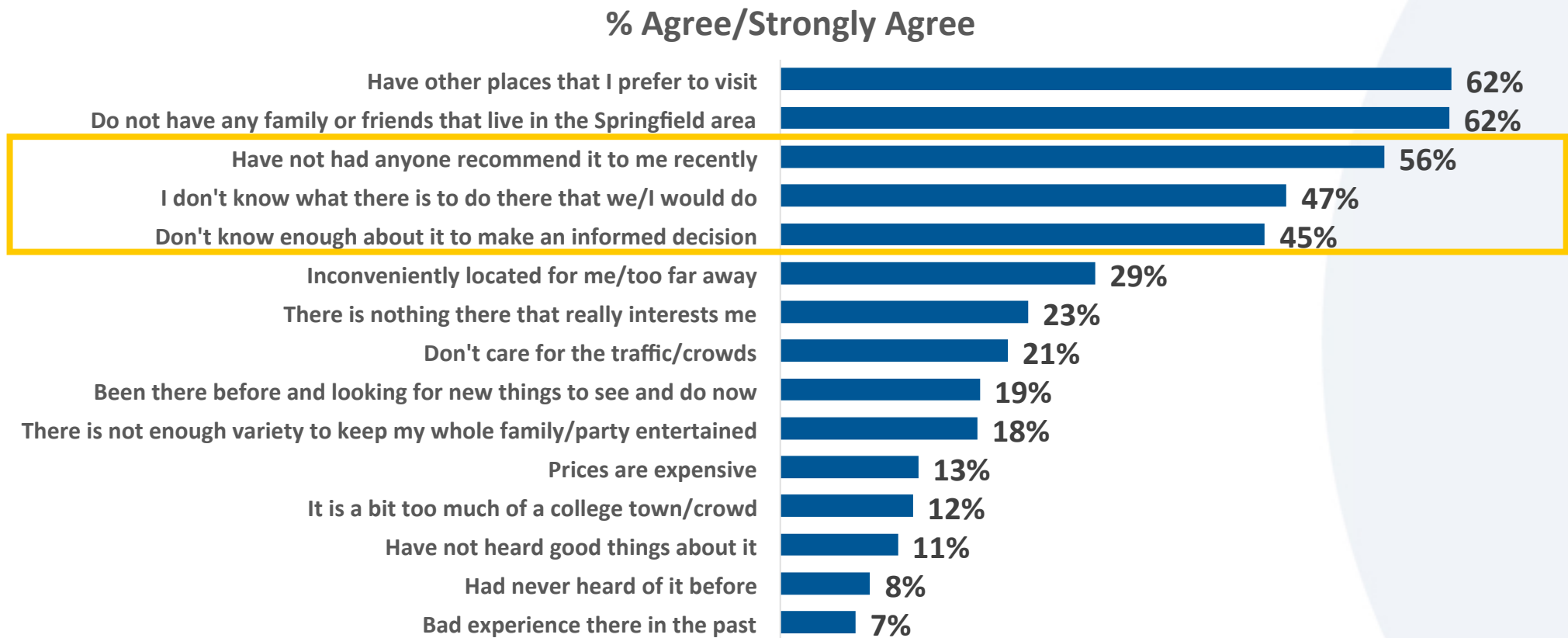
“Have too many other places I'd rather visit - usually only stop there if on the way to somewhere else”

NOT ENOUGH TO DO THERE

“haven't had the desire to, with a small child I don't think there's a lot to do for us as a family there”

Aided Hurdles to Visitation

Non-visitors/inactives indicate their primary reasons for not visiting Springfield are that they have other places they prefer to visit , don't have family or friends that live in the area or have never received a recommendation.



E: Springfield Brand Perception Study, H2R Market Research
Using the scale provided, please rate how strongly you agree with the following reasons for
you have not visited Springfield, or have not visited recently?

RESPONDENT BASE: NON-VISITORS/INACTIVES |

Efficiency & Effectiveness Performance

DW is Springfield doing?

05

Market Reach (Aware Traveler Households)

Market reach totaled more than 11M travel households this year, up from 7.2M last year.

Interestingly, marketing awareness was highest among travelers living 151-400 miles away than it was both closer and farther from Springfield. While this is somewhat unusual, it is a trend that has been noted among several destinations this year as digital communications become a more pronounced part of DMOs' marketing strategies.

Market	Total Ad Awareness	Total Market Reach
Tier 1: 51-150 miles	50.0%	0.6M
Tier 2: 151-225 miles	53.9%	1.3M
Tier 3: 226-400 miles	53.7%	4.3M
Tier 4: 401-500 miles	50.4%	4.9M
Total Market	52.0%	11.1M
2015	38.7%	7.2M
H2R Industry Norm	31.3%	n/a

Marketing Efficiency (Cost per Aware Travel Household)

CVB's 2016 marketing campaign efficiently reached travelers in these target markets at a cost of just \$0.08 per aware travel household.

The Springfield CVB spent more than \$840k on leisure travel marketing in 2016. With a market reach of more than 11 million households, this averages to a cost per aware travel household was only \$0.08, or \$0.03 less than the \$0.11 spent last year.

Market	Media Investment	Total Market Reach	Total Cost/HH
Tier 1: 51-150 miles	\$41,114	0.6M	\$0.07
Tier 2: 151-225 miles	\$230,378	1.3M	\$0.18
Tier 3: 226-400 miles	\$270,351	4.3M	\$0.06
Tier 4: 401-500 miles	\$301,946	4.9M	\$0.06
Total Market	\$843,789	11.1M	\$0.08
2015	\$800,000	7.2M	\$0.11
H2R Industry Norm	\$366,624	n/a	\$0.36

Visitation Impacted

Springfield's 2016 marketing campaign impacted 123k trips that may not have otherwise occurred.

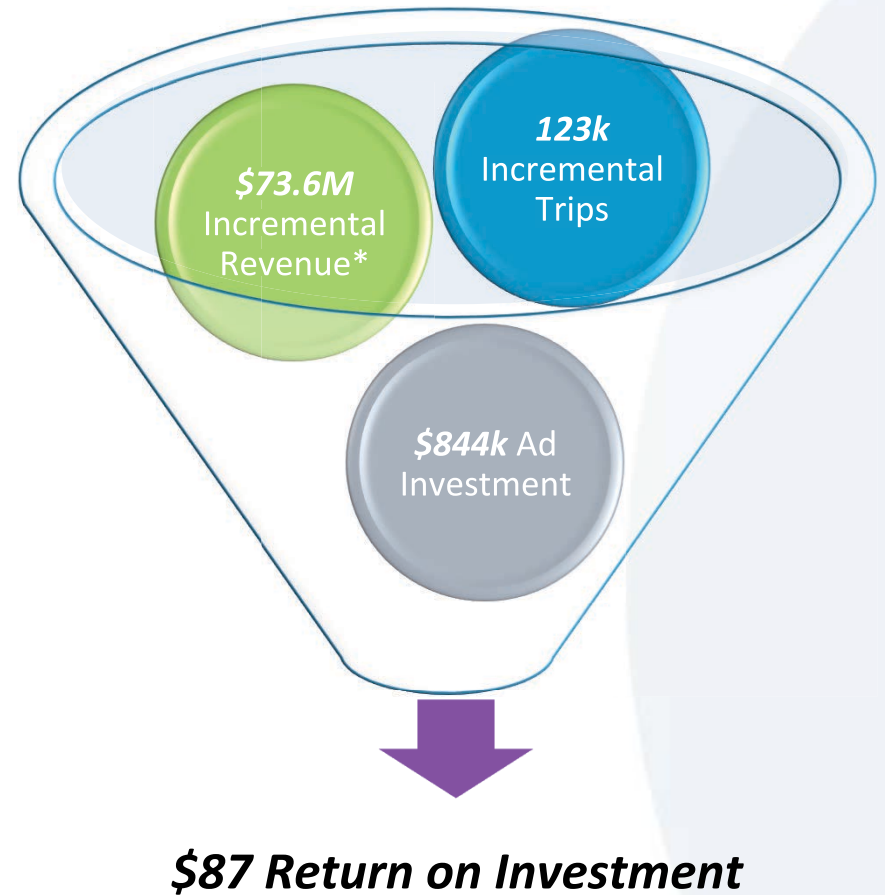
Impacted travel is the difference in visitation between those households who were aware of the SCVB's advertising and those who were not. Impacted trips is the percentage of impacted travel multiplied across the number of aware travel households in the target market.

Market	Total Market Reach	Incremental Travel	Incremental HH Trips
Tier 1: 51-150 miles	0.6M	0.4%	2.3k
Tier 2: 151-225 miles	1.3M	0.6%	8.0k
Tier 3: 226-400 miles	4.3M	1.1%	46.8k
Tier 4: 401-500 miles	4.9M	1.4%	65.9k
Total Market	11.1M	1.1%	123.0k
2015	7.2M	1.5%	110.1k
H2R Industry Norm	n/a	4.4%	45.5k

SCVB's 2016 Campaign generated an ROI of \$87 for every dollar invested.



**Aware Party
Trip Spending**
\$598
2015: \$533



Incremental revenue is revenue generated that, without advertising, would not have occurred.

RESPONDENT BASE: VISITED SPRINGFIELD IN THE PAST 12 MONTHS |

Traveler Spending Impacted

Springfield's 123k impacted trips generated \$73.6M in travel spending that may not have otherwise been spent.

Springfield visitors reported spending an average of \$598 per party on their most recent visit. Not surprisingly, those traveling from farther away spent more than those visiting from shorter distances. This is fueled by longer lengths of stay (3.7 nights in Tier 4 vs. 2.4 nights in Tier 1).

Market	Incremental HH Trips	Travel Spending per Party	Incremental Spending
Tier 1: 51-150 miles	2.3k	\$469	\$1.1M
Tier 2: 151-225 miles	8.0k	\$512	\$4.1M
Tier 3: 226-400 miles	46.8k	\$615	\$28.8M
Tier 4: 401-500 miles	65.9k	\$601	\$39.6M
Total Market	123.0k	\$598	\$73.6M
2015	110.1k	\$533	\$58.7M
H2R Industry Norm	45.5k	\$601	\$27.6M

Return on Investment

SCVB's 2016 marketing campaign generated a return on investment of \$87.

This means that the campaign generated \$87 in incremental travel revenue for every \$1 invested in marketing. This ROI compares favorably to last year's \$73 ROI, and it is slightly higher than H2R's Industry Norm for DMOs with comparably sized marketing budgets.

Market	Incremental Spending	Media Investment	Return on Investment
Tier 1: 51-150 miles	\$1.1M	\$41,114	\$26
Tier 2: 151-225 miles	\$4.1M	\$230,378	\$18
Tier 3: 226-400 miles	\$28.8M	\$270,351	\$106
Tier 4: 401-500 miles	\$39.6M	\$301,946	\$131
Total Market	\$73.6M	\$843,789	\$87
2015	\$58.7M	\$800,000	\$73
H2R Industry Norm	\$27.6M	\$366,624	\$85

Springfield, MO 2016 Marketing & Media Effectiveness

Key Performance Indicators

The Springfield Convention & Visitors Bureau (SCVB) generated awareness from 52% of the travel households in their target markets, a 34% increase over 2015.

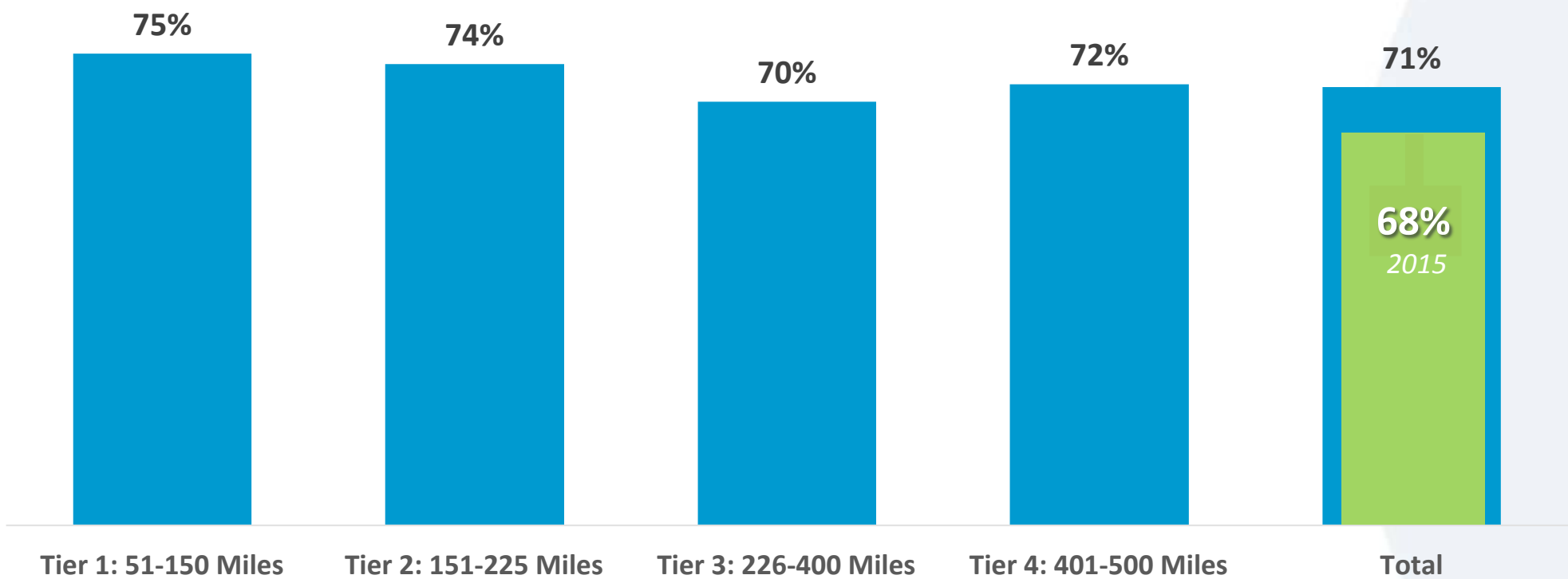
This equates to 11.1M households across the region. Additionally, this campaign was responsible for impacting 123k trips to the Springfield area and for influencing nearly \$74M in spending. Given an investment of \$844k, this means the CVB generated a return of \$87 for every dollar invested in marketing.

Key Performance Indicators	2015	2016	H2R Industry Norm*
Aided Ad Awareness	38.7%	52.0%	31.3%
Aware Traveler Households	7.2M	11.1M	n/a
Increment	+1.5%	+1.1%	+4.4%
Incremental Trips	110k	123k	46k
Incremental Travel Revenue	\$58.7M	\$73.6M	\$27.6M
Media Investment	\$800k	\$844k	\$367k
Cost/Aware Household	\$0.11	\$0.08	\$0.36
Return on Investment	\$73	\$87	\$85

H2R Industry Norm is calculated using metrics from destinations whose budgets are less than \$1M—similar to Springfield CVB.

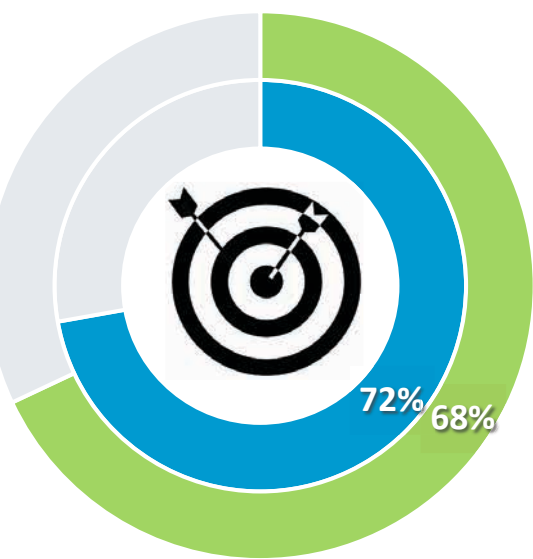
More than 70% of travelers indicated the ads in SCVB’s marketing campaign made Springfield seem more appealing to them, +3 points from last year.

% Makes Springfield Seem A Little/Much More Appealing

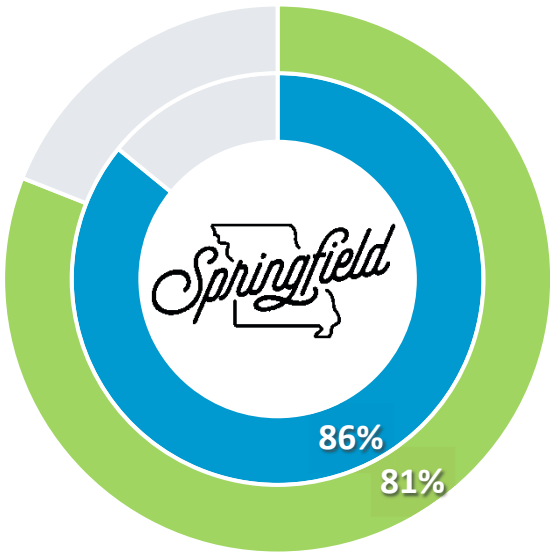


Marketing relevance, brand fit and differentiation from other destination advertising all recorded higher scores this year.

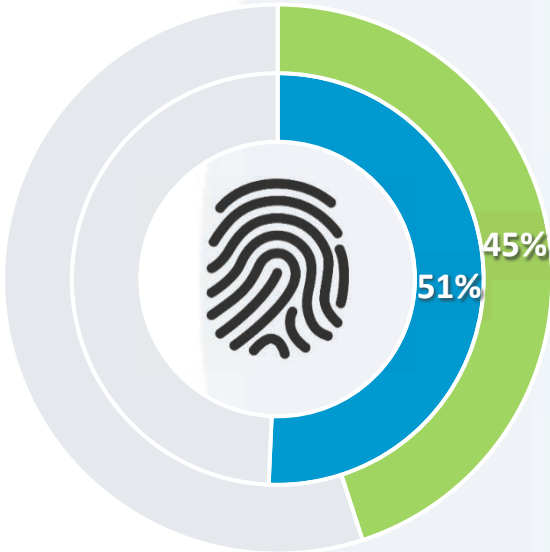
% Somewhat/Very Relevant



% Fits Brand Somewhat/Very Well



% Pretty/Much Different than Other Ads



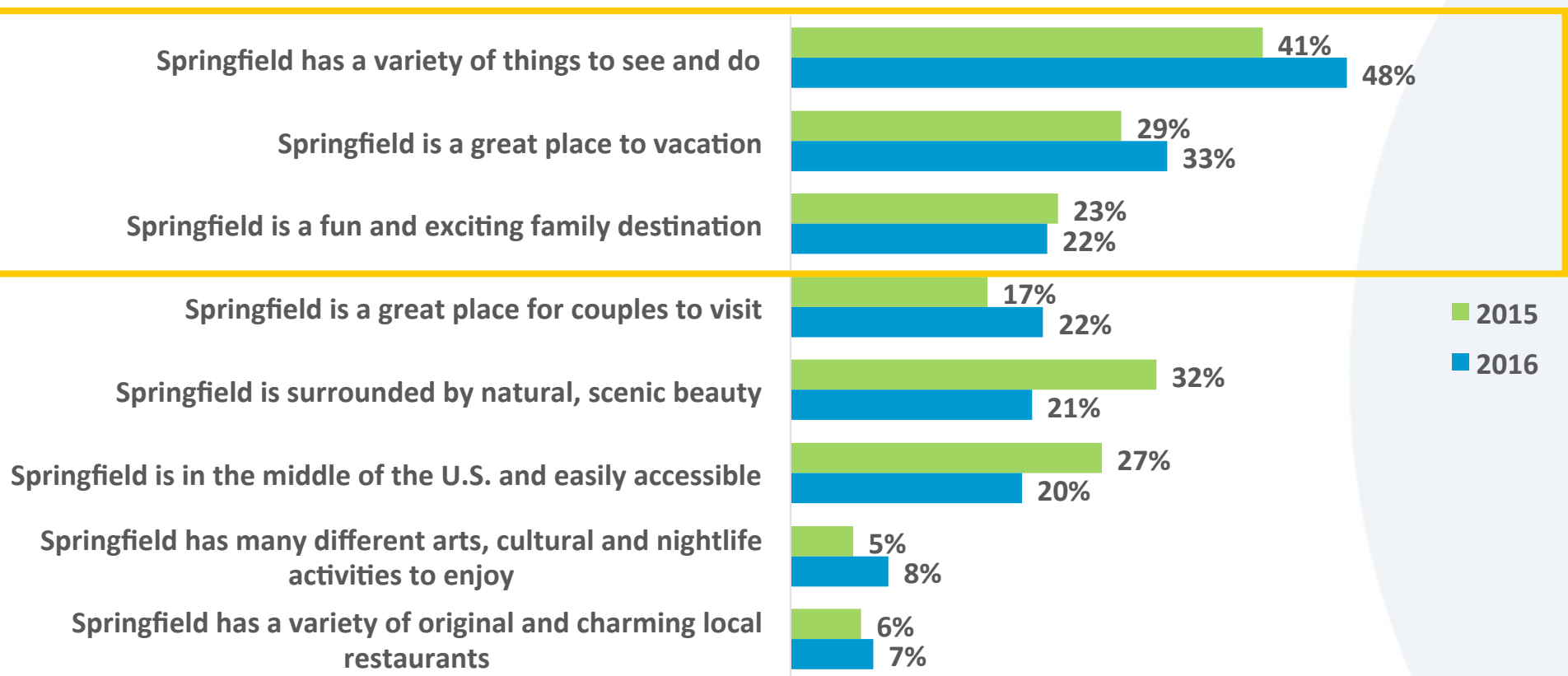
■ 2015 ■ 2016

Using the scale provided, please rate how relevant the points made in these advertisements are to you. Q33: Using the scale provided, please rate how well these ads fit with what you think about Springfield, MO. Q34: Using the scale provided, indicate how different these ads are from advertising you've seen for other destinations.

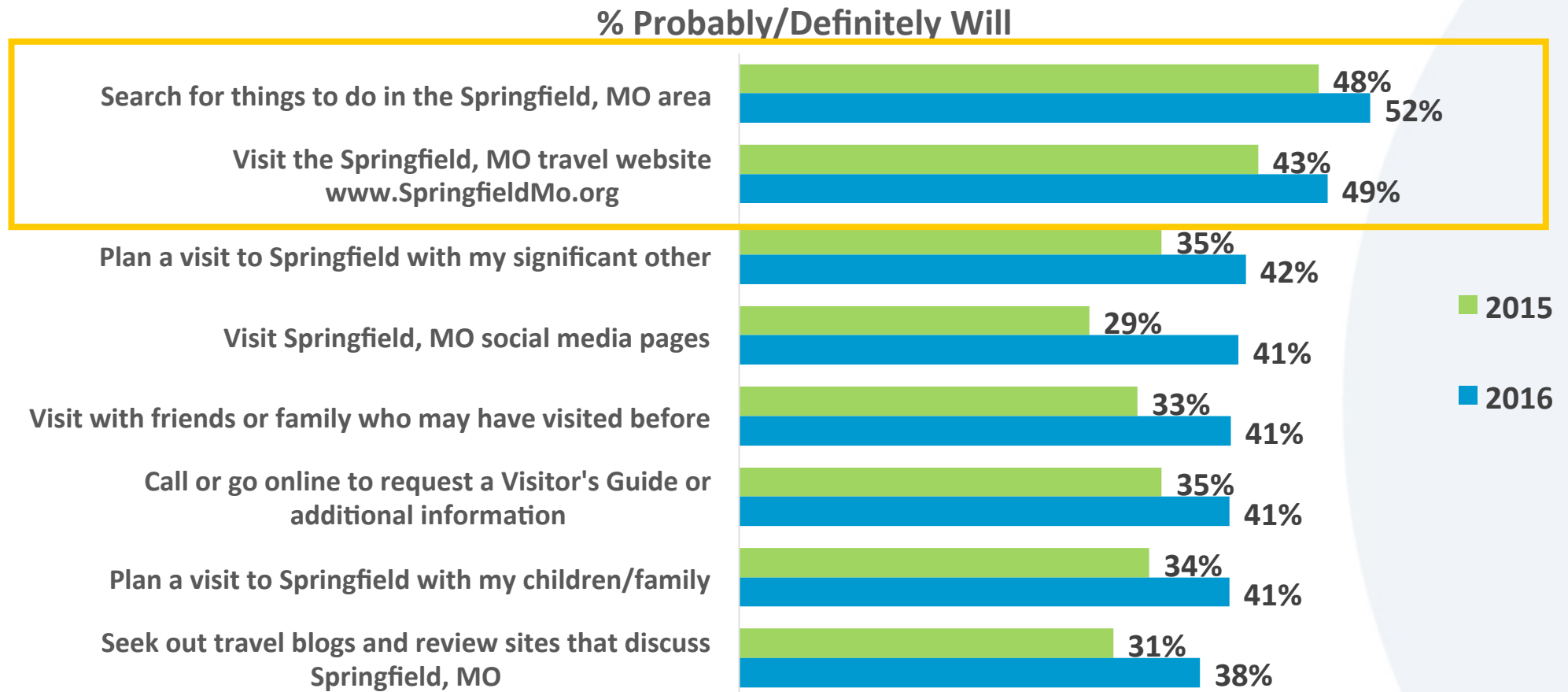
RESPONDENT BASE: ALL RESPONDENTS | N

Takeaway messages that resonated most clearly were those of variety, great place to vacation and being a fun family destination.

Traveler Messaging Takeaways - % Chose Top 2

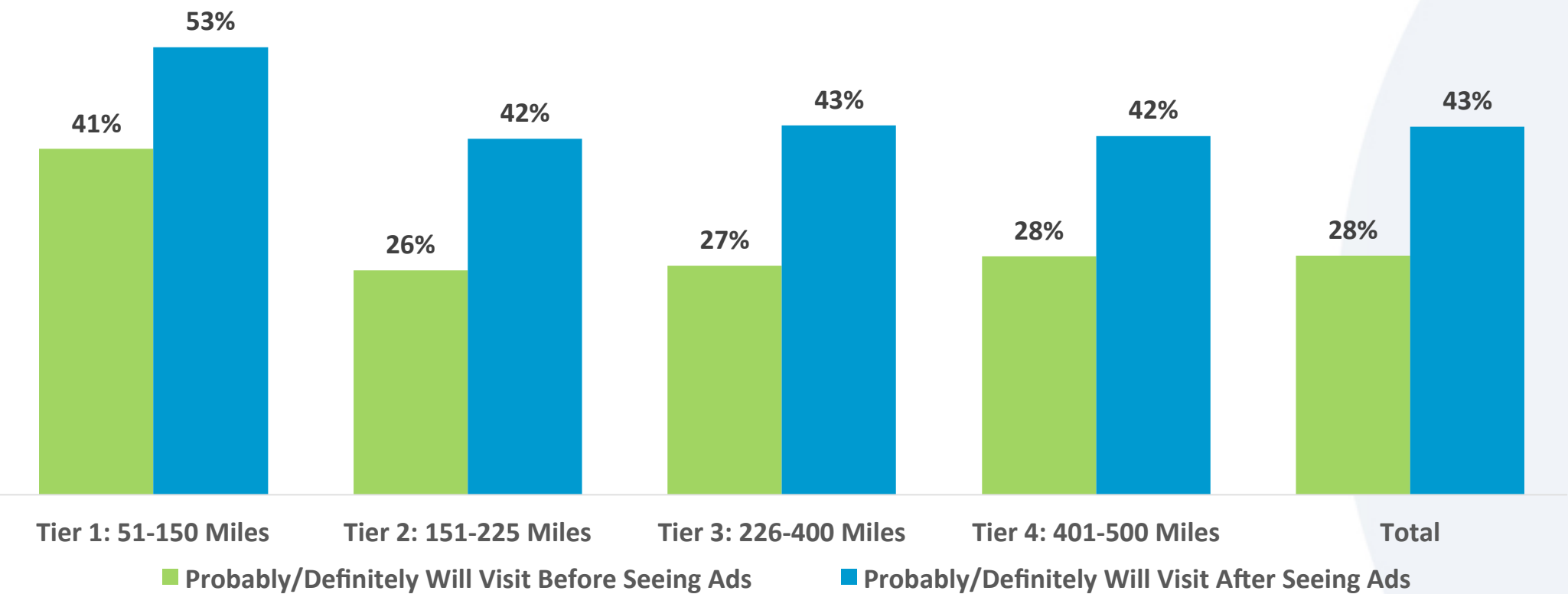


All post-ad exposure intentions enjoyed increases this year, particularly the likelihood to visit Springfield social media pages.



Post ad exposure variance in intent to visit Springfield increased across all market tiers and averaged +15 points, considerably higher than H2R's Industry Norm (+7 points).

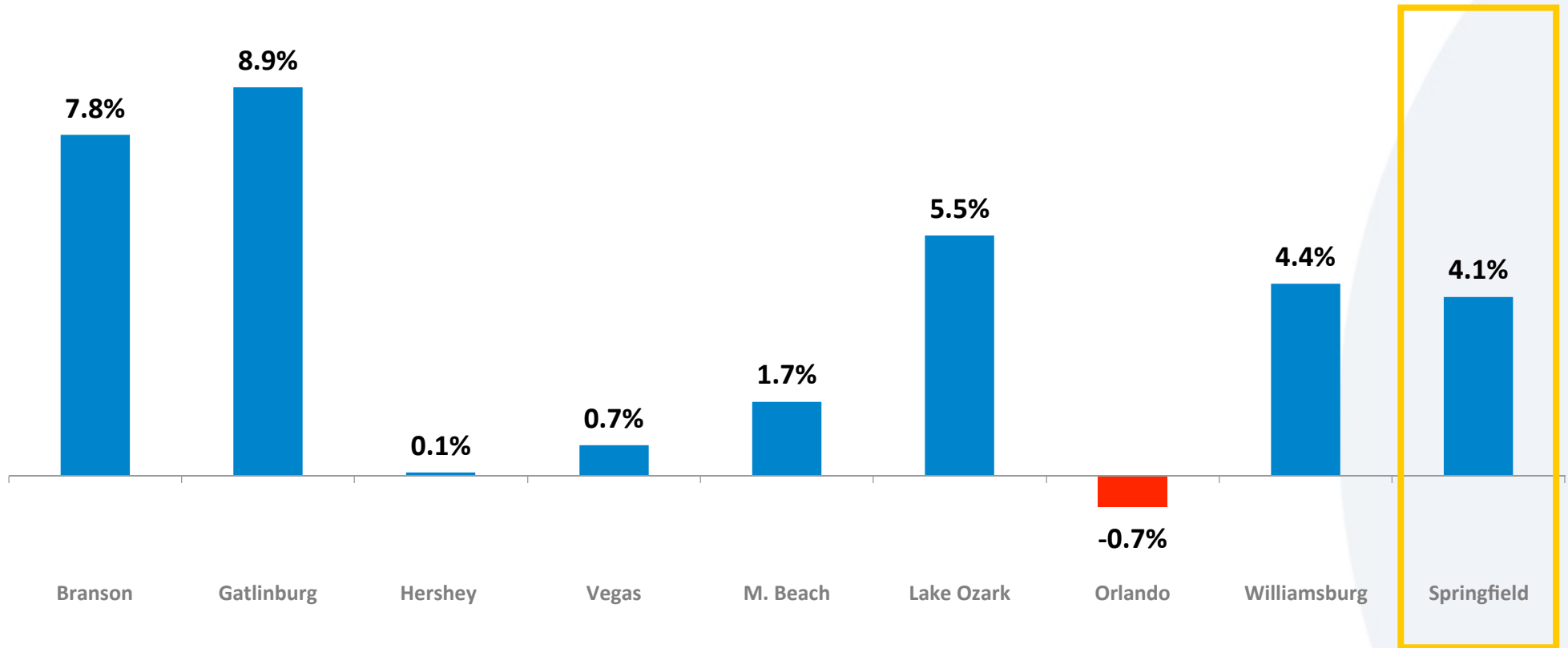
% Probably/Definitely Will Visit Springfield in the Next 12 Months



Using the scale provided, please indicate how likely you are to visit each of the following destinations in the next 12 months.
Using the scale provided, please indicate how likely you are to visit Springfield, MO in the next 12 months.

Springfield's increase in room demand (+4.1%) has outpaced the other regional destinations (+3.6%).

YTD Variance in Room Demand



Takeaways

- Springfield is considered **family friendly**, casual and affordable...and increasingly **artsy**.
- Most travelers live within a **300 mile region** and visit to **shop, patronize Bass Pro Shops** or see area museums/culture.
- More importantly, visitors are seeking a **place to have fun together** and create memories.
- The biggest hurdles to visitation are **lack of comprehension, product or family living in the area**.
- The Springfield CVB reached travelers very efficiently in 2016. More than *half (52%) of travelers across the region saw/heard the Springfield ads*. Campaign reached 11.1M traveler households at a cost of \$0.08 each (against the norm of \$0.36).
- More importantly, the **campaign was also very effective**. It impacted 123k visits and/or had a \$74 million travel impact. And, it produced an **ROI of \$87** in 2016, a new record.
- Looking forward, the ads **lifted post-exposure interest in visiting Springfield by 15 points**, or more than double the industry norm.

Thank You!



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H2R MARKET RESEARCH

Reveal Your Customer's Full Experience