



Convention & Visitors Bureau

2016 Brand Perception Follow-Up Research

Prepared by



Project Overview

PURPOSE

Prior to launching a new branding campaign in 2014, H2R Market Research conducted a baseline Brand Perception Study for the Springfield, MO area with a recommendation to conduct follow up research after the new branding campaign had time to saturate the target market. The purpose of conducting Follow-Up Branding Research was to provide decision makers insight into the changes in perception of the Springfield area, if any, and what direction further messaging should take.

TARGET AUDIENCE

Similar to the 2014 study, the 2016 Follow Up Brand Perception Research was conducted among leisure traveler decision makers living 50-300 miles from Springfield, MO.

SAMPLE

A total of 400 panel respondents and 254 house list respondents were interviewed for this study, providing a total sample of 654 interviews and a maximum margin of error of +/-3.8% at a 95% confidence interval.

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Executive Summary

Moving From Good to Great

- The Springfield CVB's rebranding campaign is having a positive impact. Not only has market awareness improved and recent visitation increased, but regional travelers also have improved feelings toward Springfield as a travel destination.
- Familiarity with Springfield increased 4 points to 95% of travelers across a 500-mile region and awareness remains 7 points ahead of the competitive set's average. Additionally, nearly 70% exhibit some level of interest in visiting Springfield and the Net Promoter Score increased by a significant 12 points over 2014.
- More than half of travelers in the target market have visited Springfield at some point in the past and one in five have visited in the past 24 months, up 3 points from 2014. Likewise, 16% have considered visiting Springfield, but just have not gotten around to it.
- That market share of lapsed visitors, recent visitors and considerers totals 68% of travelers living within a 500 mile radius, same as in 2014.



Less Outdoors & More Connection

- Outdoor activities and Route 66 remain important elements of Springfield's destination brand. But, compared to 2014, regional travelers are a bit less likely to associate Springfield with either of these attributes.
- That is, Springfield's perceived association with The Great Outdoors (-7%), Hunting & Fishing (-5%), Fresh Air (-4%), Bass Pro Shops (-3%) and even Professional Baseball (-2%) all decreased slightly compared to 2014. And, similarly, Springfield's association with Route 66 fell from 49% in 2014 to 42% this year.
- Meanwhile, Springfield is seen as having stronger associations with The Big City (+8%), A Regional Hub (+6%), Arts & Culture (+6%), Technology (+4%) and Great Restaurants (+4%).
- Additionally, attitude toward "The Ozarks" continues to improve (84% positive today vs 82% in 2014).



More Positive Emotional Connection

- Travelers familiar with Springfield are most likely to describe the area with terms such as Family Friendly, Casual, Affordable, Accessible and Down-to-Earth. However, compared to 2014 the biggest gains were for Artsy (+12%), Ordinary (+9%), Entrepreneurial (+8%), Restful/Relaxing (+7%) and Diverse (+6%).
- Springfield's recent leisure visitors continue to say they were motivated to visit by a desire to participate in activities that everyone in the party could enjoy, make memories with their families or desire to repeat a family tradition.
- However, compared to 2014 the largest increases came from visitors' desire to participate in activities together (+6%), to placate their children/grandchildren who wanted to visit (+6%) and to continue a family tradition (+6%). Conversely, there was less desire to visit for the purpose of escaping and unplugging (-9%) and to see new exhibits/experiences they hadn't seen before (-3%).



Strong Market Position

- Many of the gains recorded in this year's study were likely made possible by the large increase in assisted ad awareness which improved by 14 points (34%) this year.
- The market position that continues to resonate the best with travelers is "Gateway to the Great Outdoors," but this positioning dropped 9% and is now in a statistical dead heat with "A Quaint Midwestern Town Full of History and Heritage" and "Classic Americana." Interestingly, "A Metropolitan City with Small Town Charm" increased the most (+9%) since 2014. Overall, more than three-quarters (77%) say they believe Springfield delivers on its brand promise.
- Travelers are still most likely to use Internet search engines, SpringfieldMO.org, Springfield's Visitor Guide, Websites of specific hotels/attractions, and the Missouri Travel Guide to plan their visits to the area.



Looking Back and Forward

- **Growing Ad Awareness.** One of the top recommendations after the 2014 study was to grow ad awareness, and Springfield has done just that. The new advertising has reached more travelers and we recommend continuing on this same path.
- **Narrowing the Focus.** Advertising focus was narrowed to a simpler message: Life's Simple Pleasures. This simple focused message was great for showcasing Springfield in an easy to digest manner, and still was able to display the variety that is available here. Again, this path is working and we recommend continuing down it.
- **Brand Advocacy.** Brand advocacy is still important. Springfield's NPS increased significantly this year, meaning the visitors who were attracted as a result of the new brand were highly satisfied and wanted to tell their friends. Continuing to leverage the new visitor and helping them promote the Springfield area will remain important going forward.
- **Connecting Emotionally.** Springfield has shifted from convincing travelers to come for the assets to convincing them to visit for emotional reasons. Emotions are a much stronger driver, and activities/attractions are icing on the cake. H2R recommends continuing to deepen the emotional connection with travelers to create an even stronger brand in the future.

Competitive Landscape

- + *Top of Mind Weekend Getaways*
- + *Aided Awareness*
- + *Target Market Visitation*
- + *Market Potential*
- + *Opinion of Destinations*
- + *Net Promoter Scores*
- + *Future Intent*
- + *Route 66 Association*

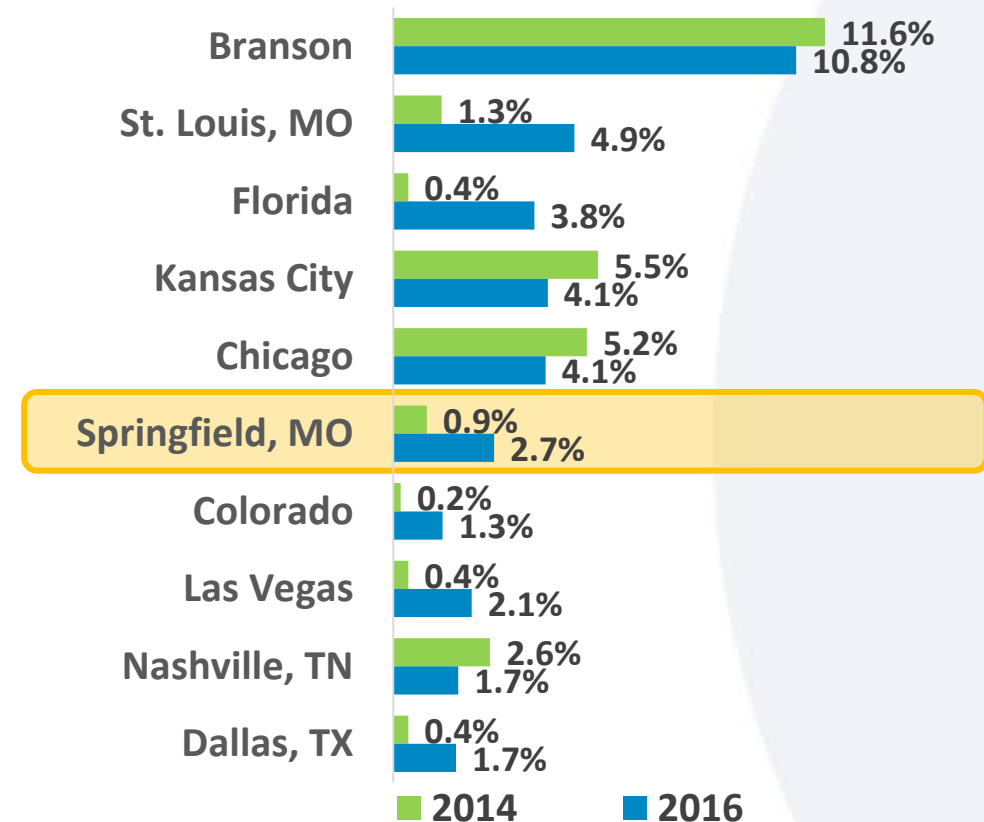
01

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

Unaided Destinations – Any Mention

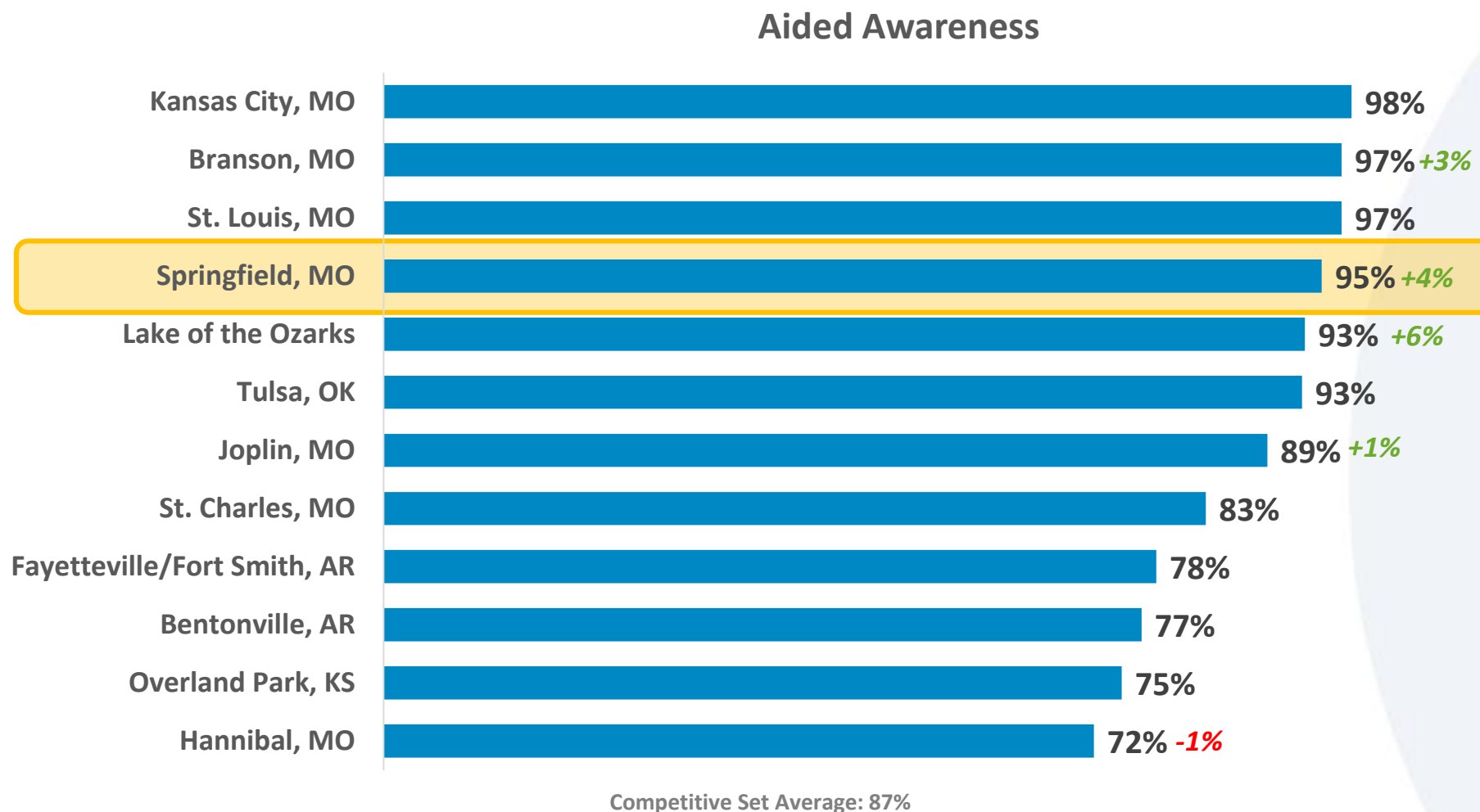


Any Mention of Destinations



Q3: When you think of overnight or weekend getaways, which destinations first come to mind?

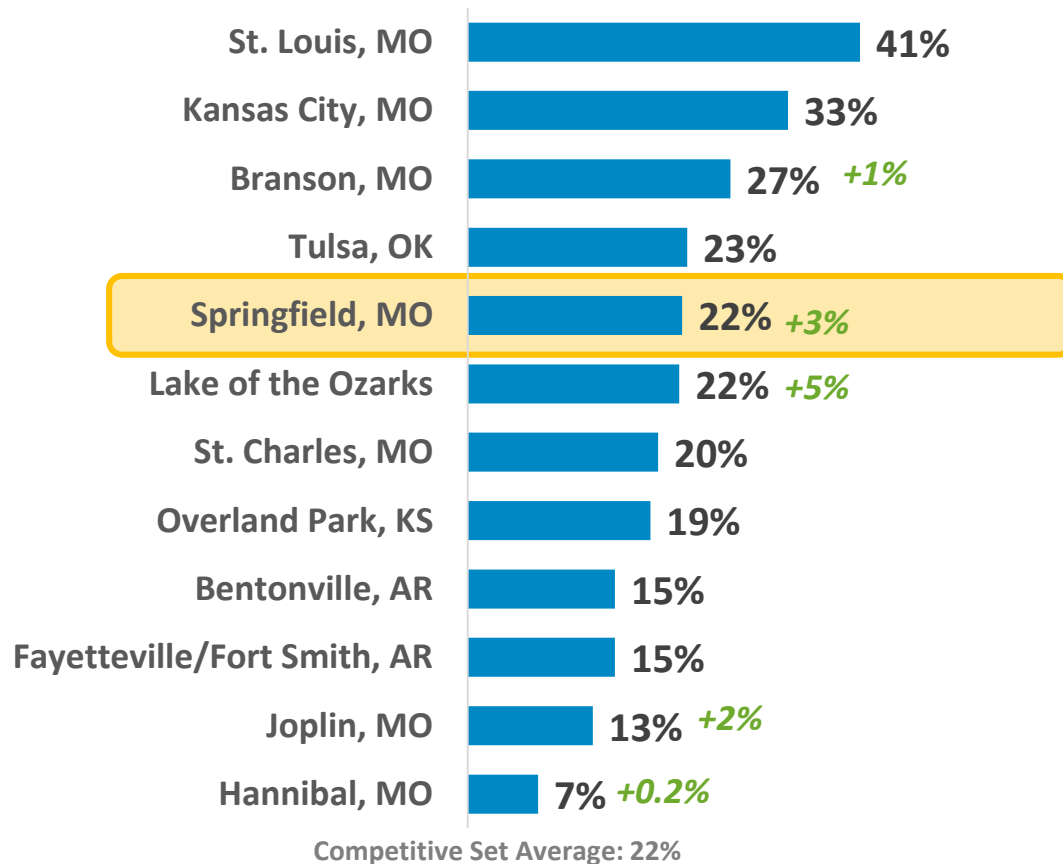
Aided awareness of Springfield increased significantly by 4 points over 2014.



Q5: Please indicate your awareness and prior visitation of the following area destinations:

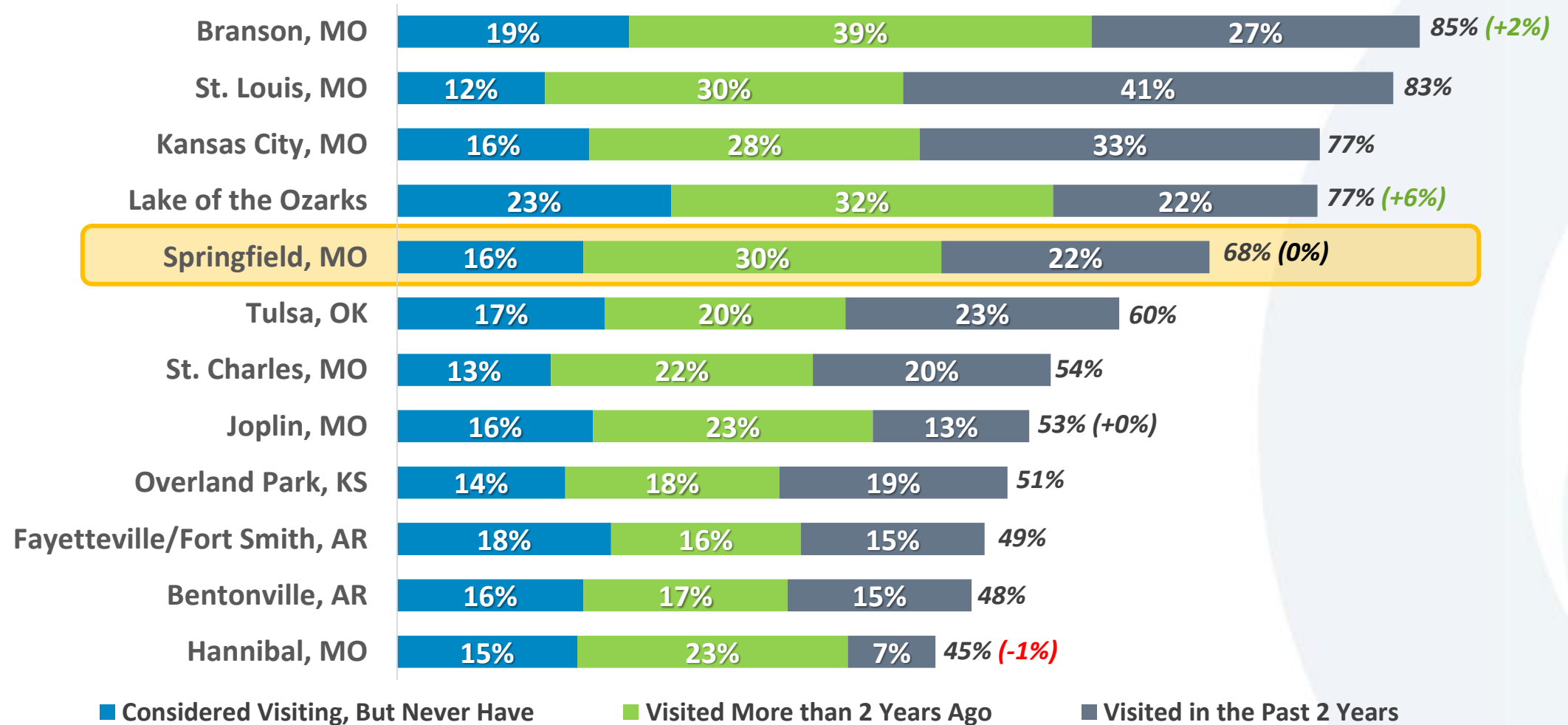
Springfield enjoyed visitation from 1.7 Million households over the past 2 years – or 22% of the target market, up 3% over 2014.

Visited in the Past 24 Months



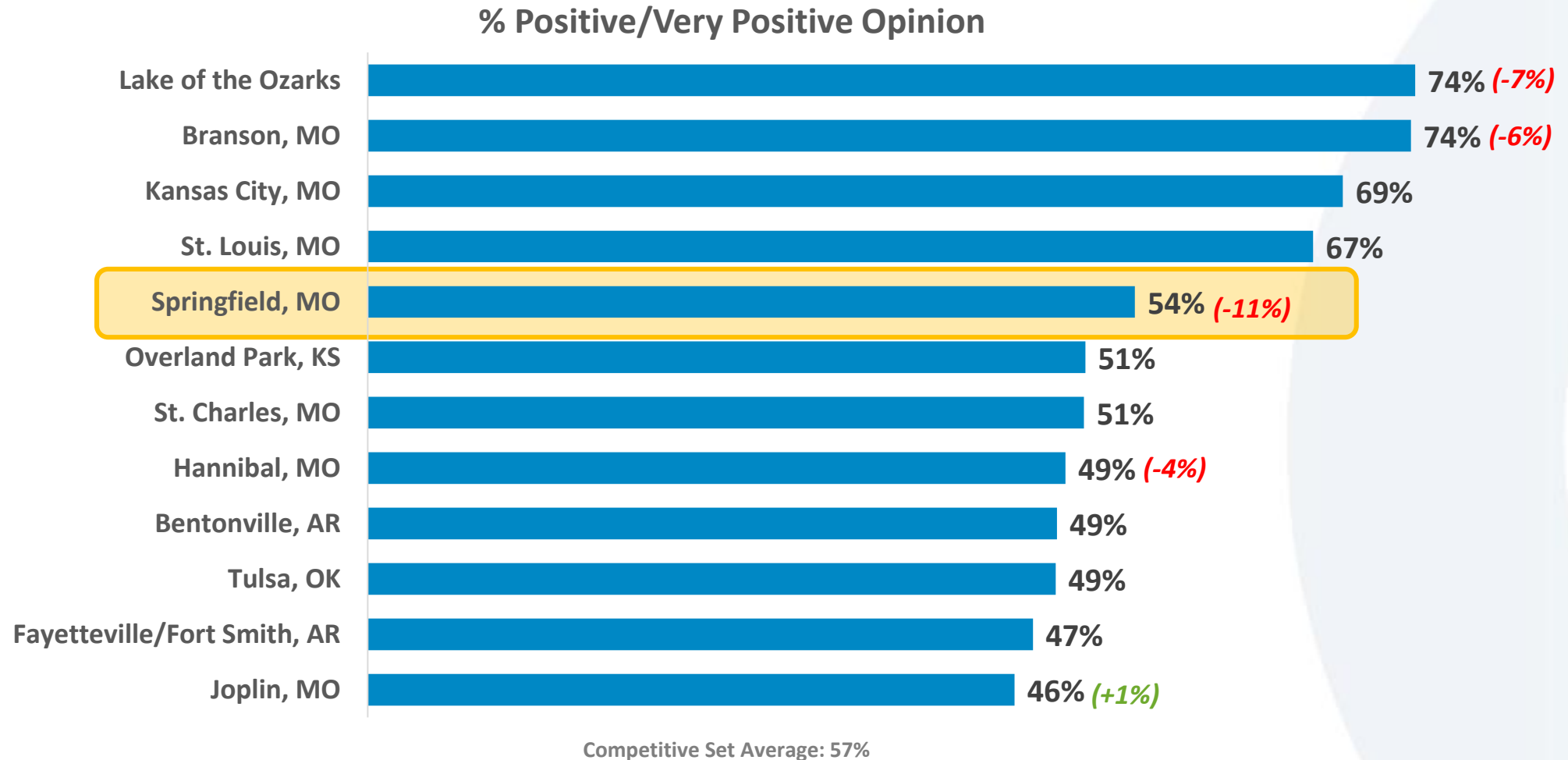
Q5: Please indicate your awareness and prior visitation of the following area destinations:

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.



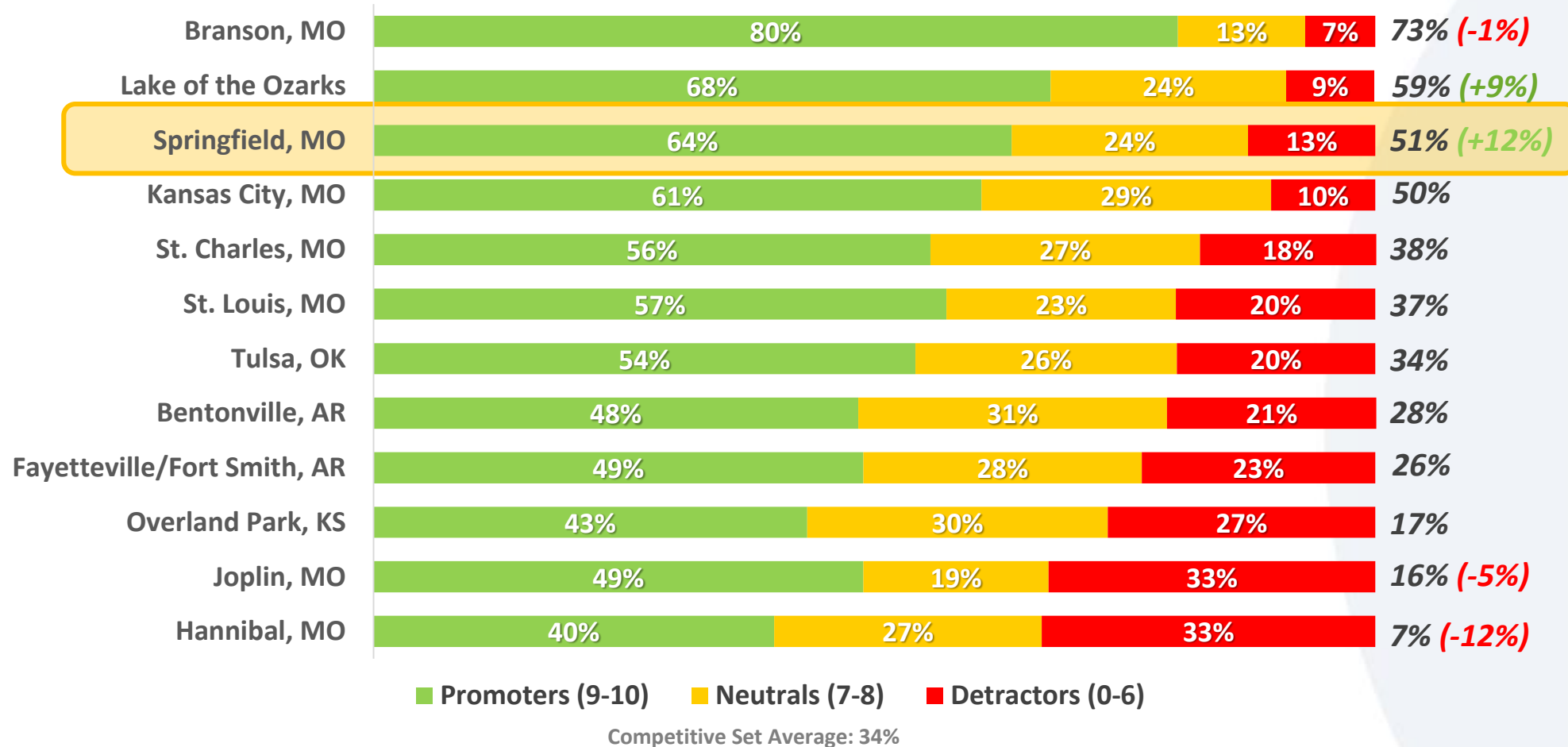
Q5: Please indicate your awareness and prior visitation of the following area destinations:

Springfield ranks 5th overall for positive opinions in the competitive set, with more than half saying they view Springfield positively.

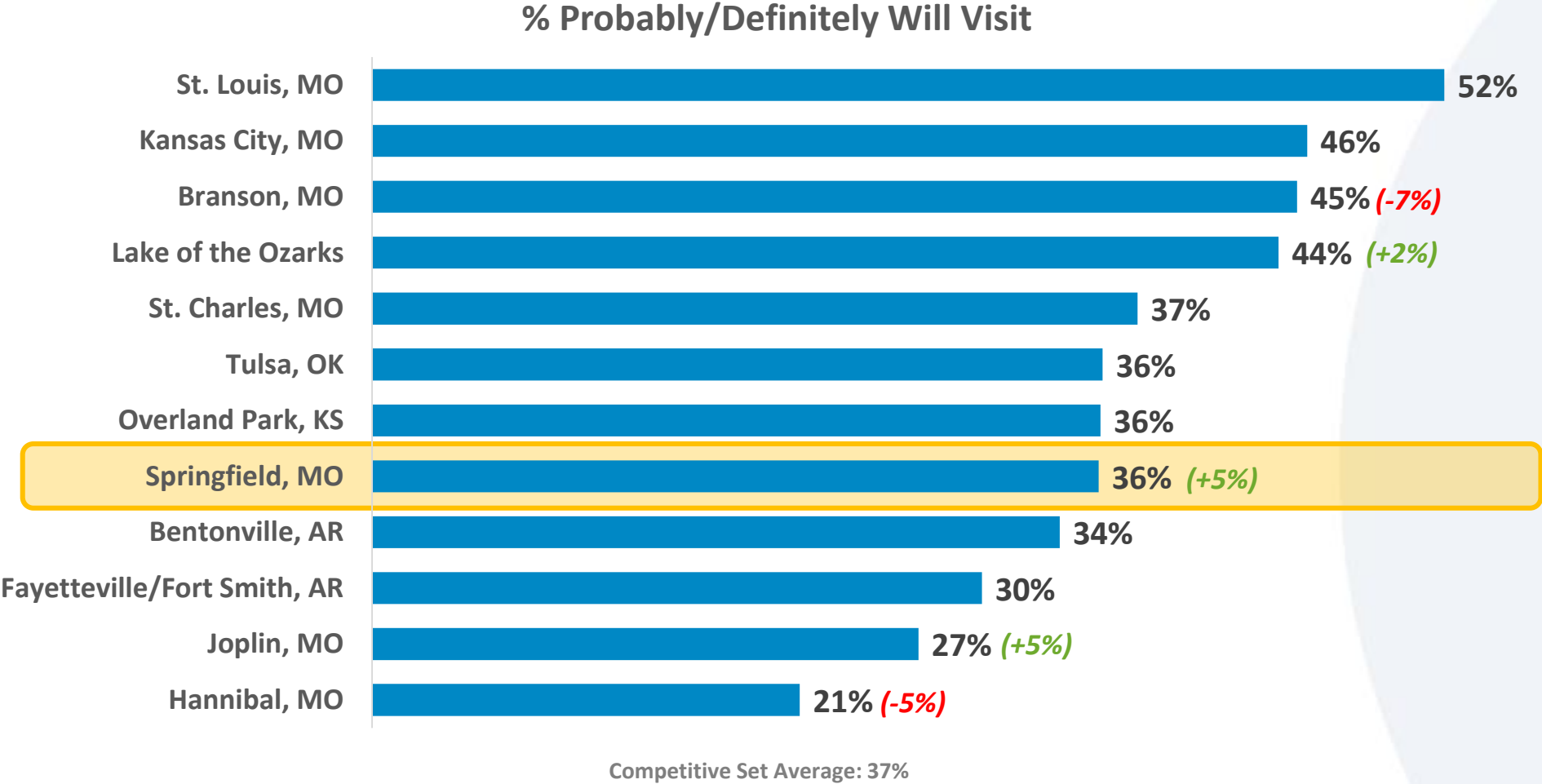


Q6: Using the scale provided, please indicate to what degree your opinion of these destinations is positive or negative.

Springfield's NPS (51%) is above the competitive set average (36%) as well as the H2R Industry Norm (23%), and increased significantly over 2014's score (39%).

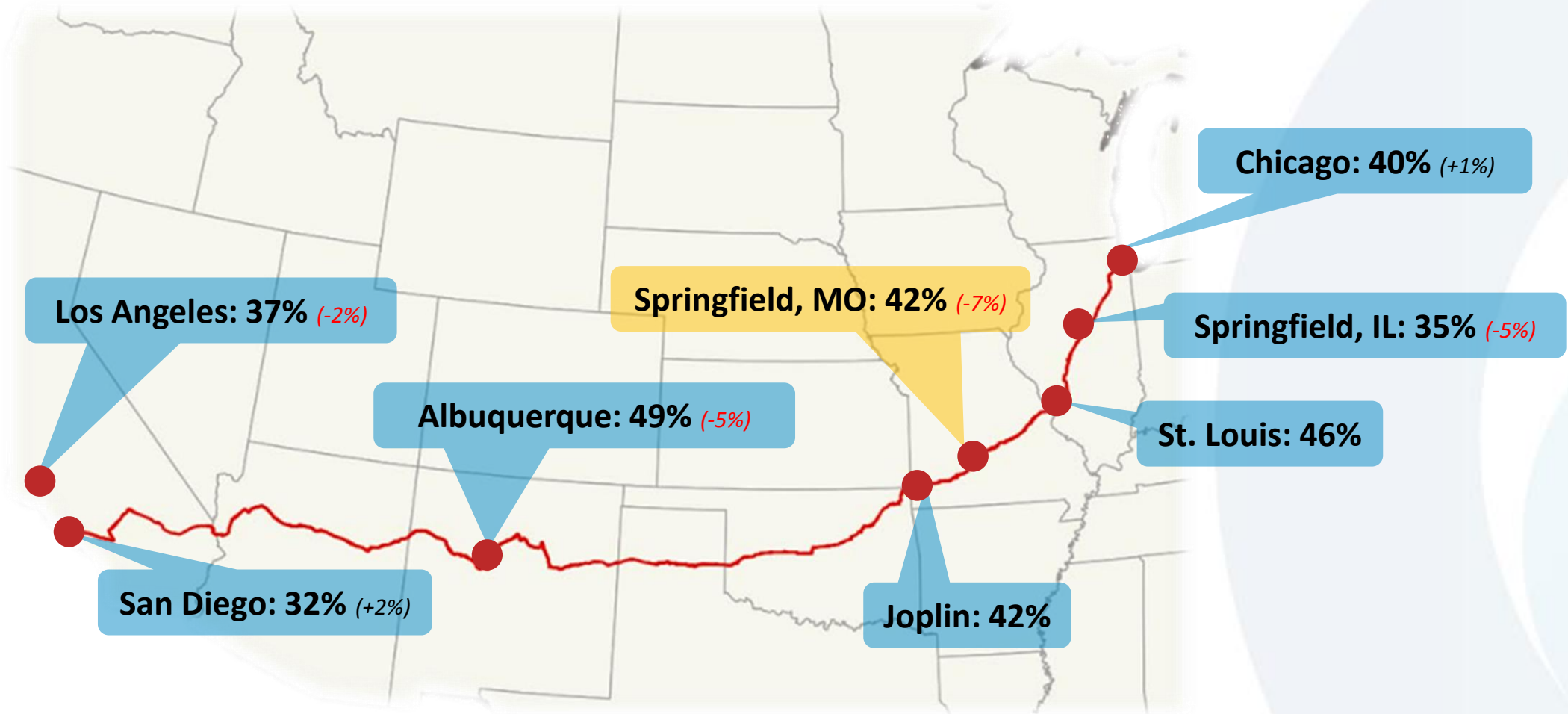


Intent to visit Springfield increased by 5 points since 2014. More than one-third (36%) of regional travelers exhibit a desire to visit Springfield in the next 12 months.



Q8: Using the scale provided, please indicate how likely you are to visit each of the following destinations in the next 12 months.

More than 4 in 10 travelers associate Springfield with Route 66.
But, this is down 7% from 2014.



Q9: Using the scale provided, please rate the degree to which you associate each of the following cities with the legendary U.S. highway Route 66.

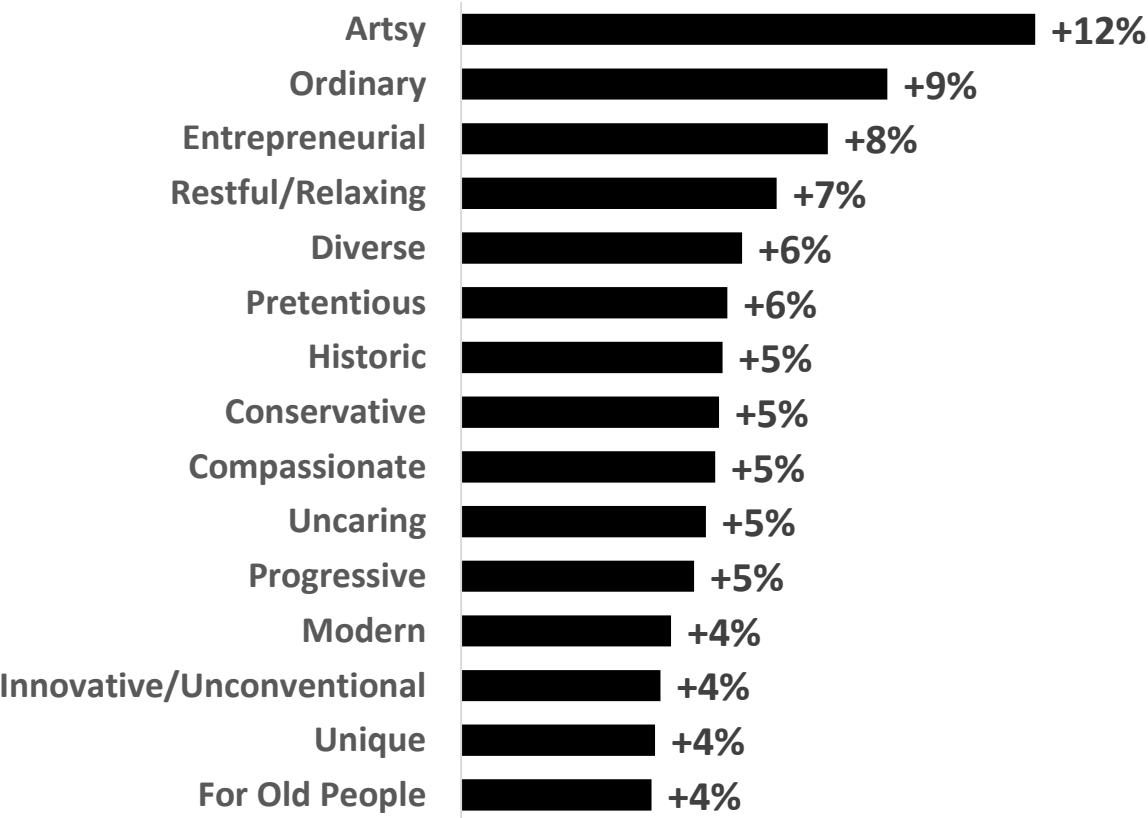
Springfield, MO Brand & Market Position

- + *Brand Perception*
- + *Brand Attributes*
- + *Attitude toward “The Ozarks”*
- + *Brand Descriptors*
- + *Advertising Awareness*

02

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%

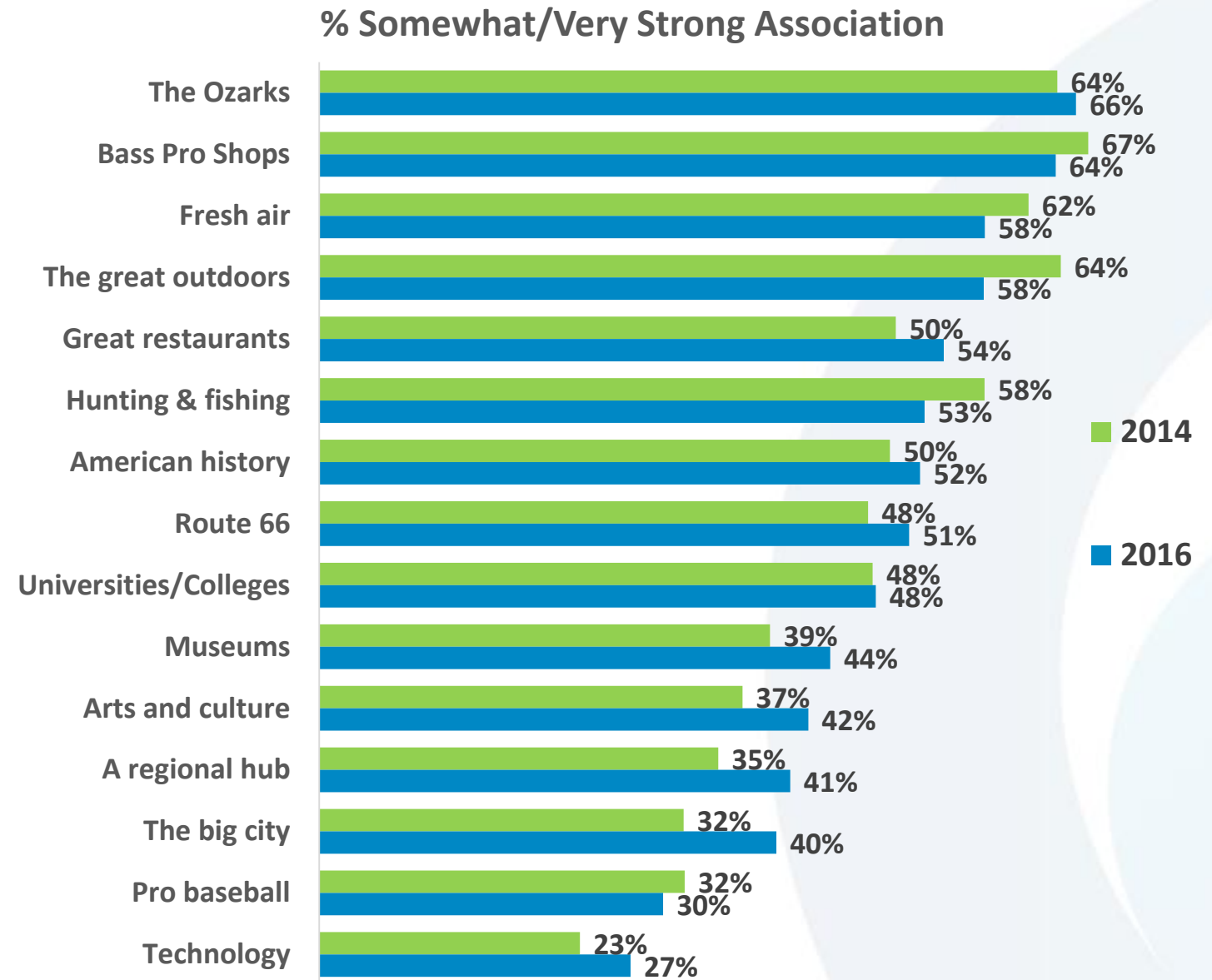


Historic
68%

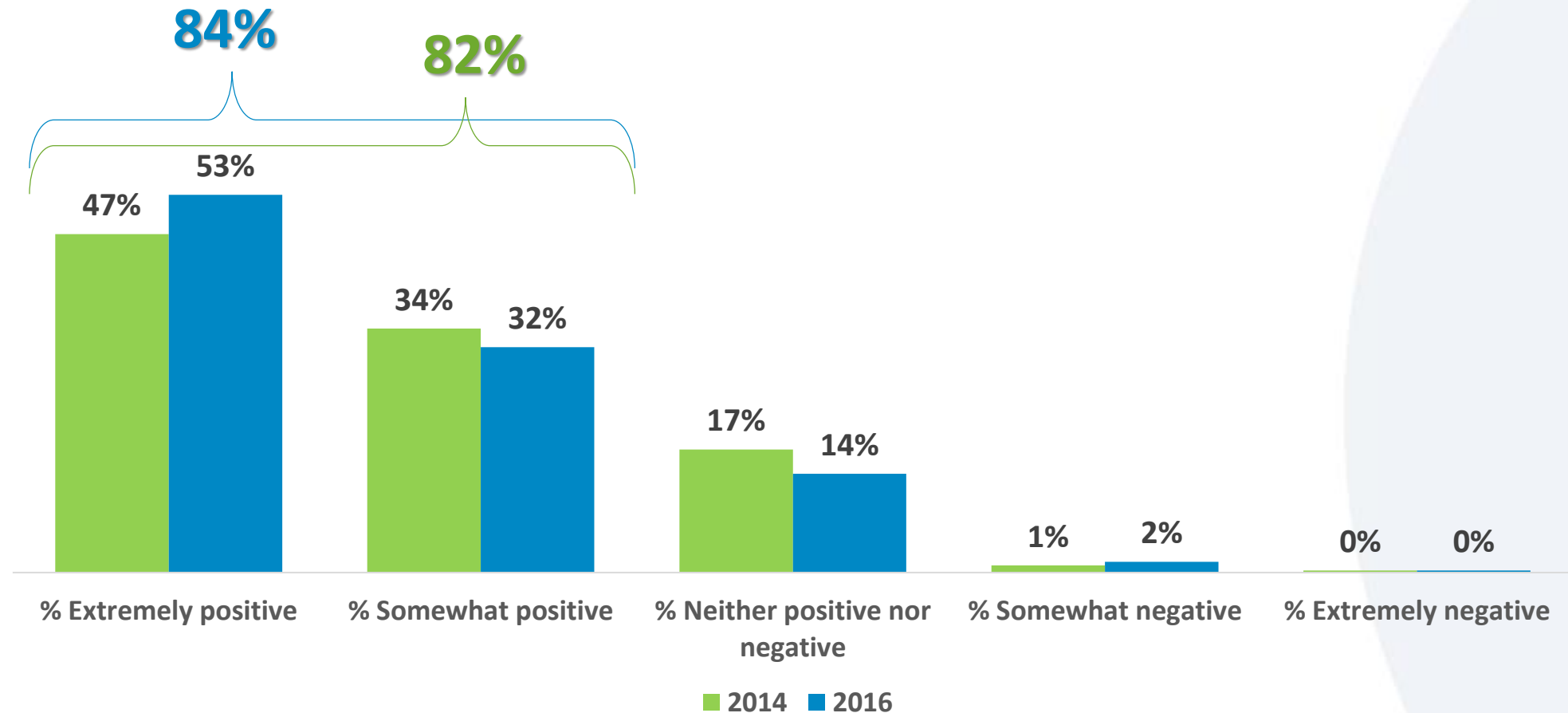
Q10: Using the scale provided, please rate the degree to which you associate the following adjectives with Springfield, Missouri as a travel destination.

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%).

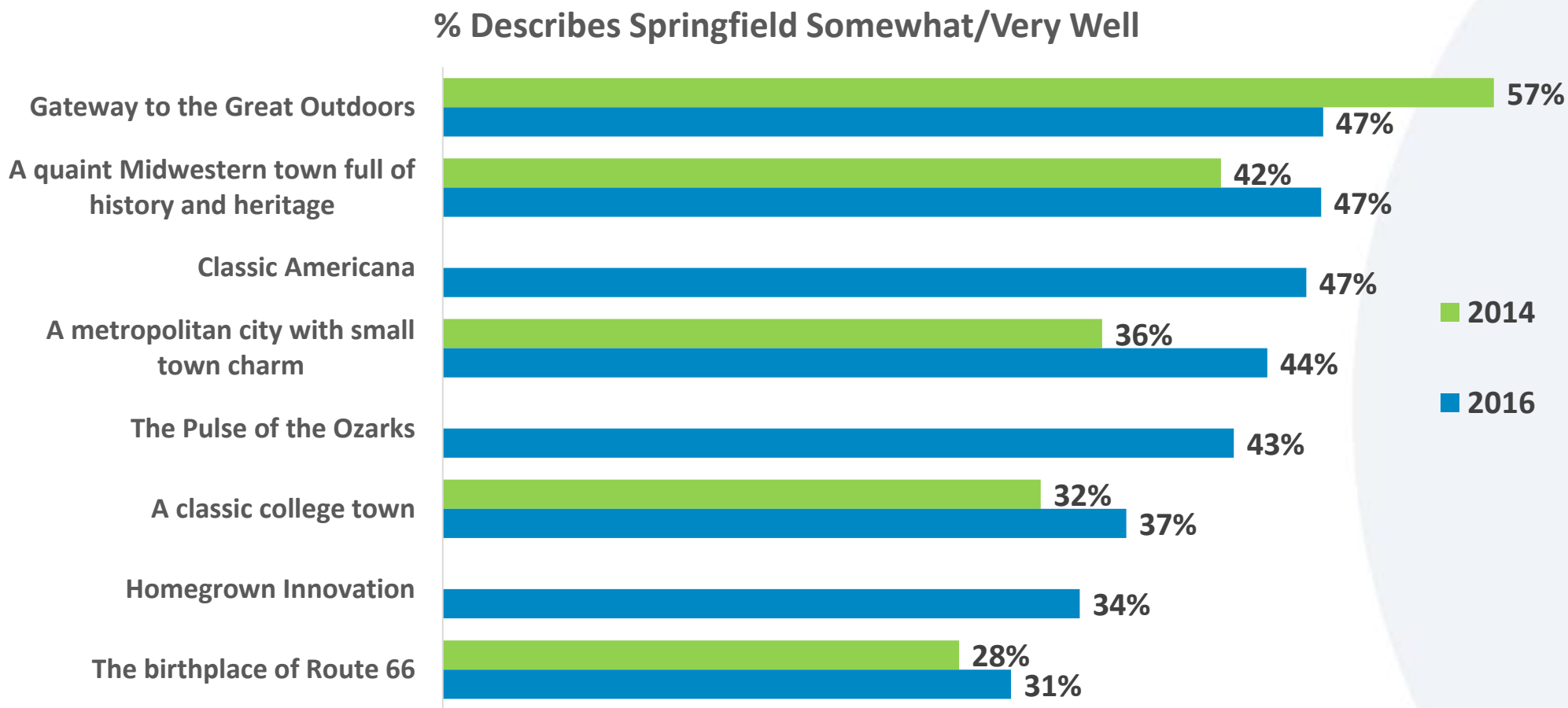


The attitude toward “The Ozarks” continues to improve as well, with a 2% increase in positive opinion since 2014.



Q24: Using the scale provided, please tell us which of the following best describes your attitude toward "The Ozarks."

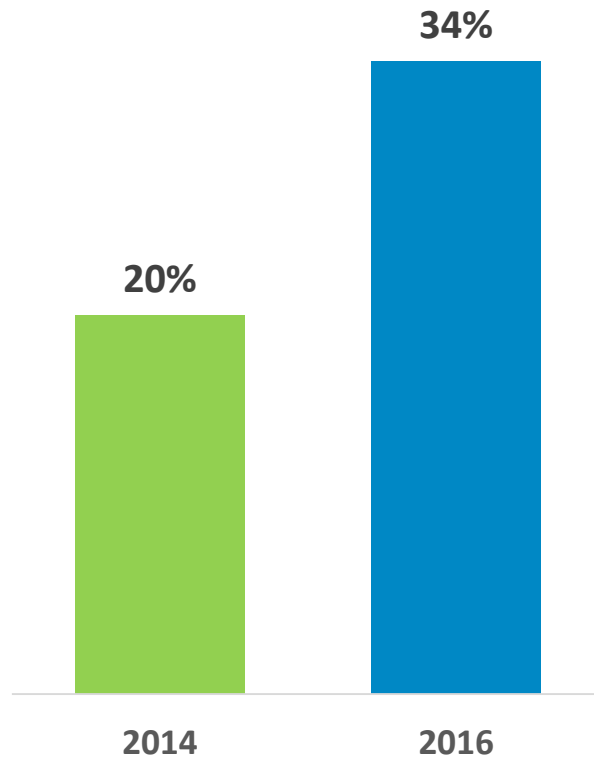
The feeling that Springfield is the Gateway to the Great Outdoors decreased significantly (-9%) while the feeling of A Metropolitan City with Small Town Charm increased the most (+9%).



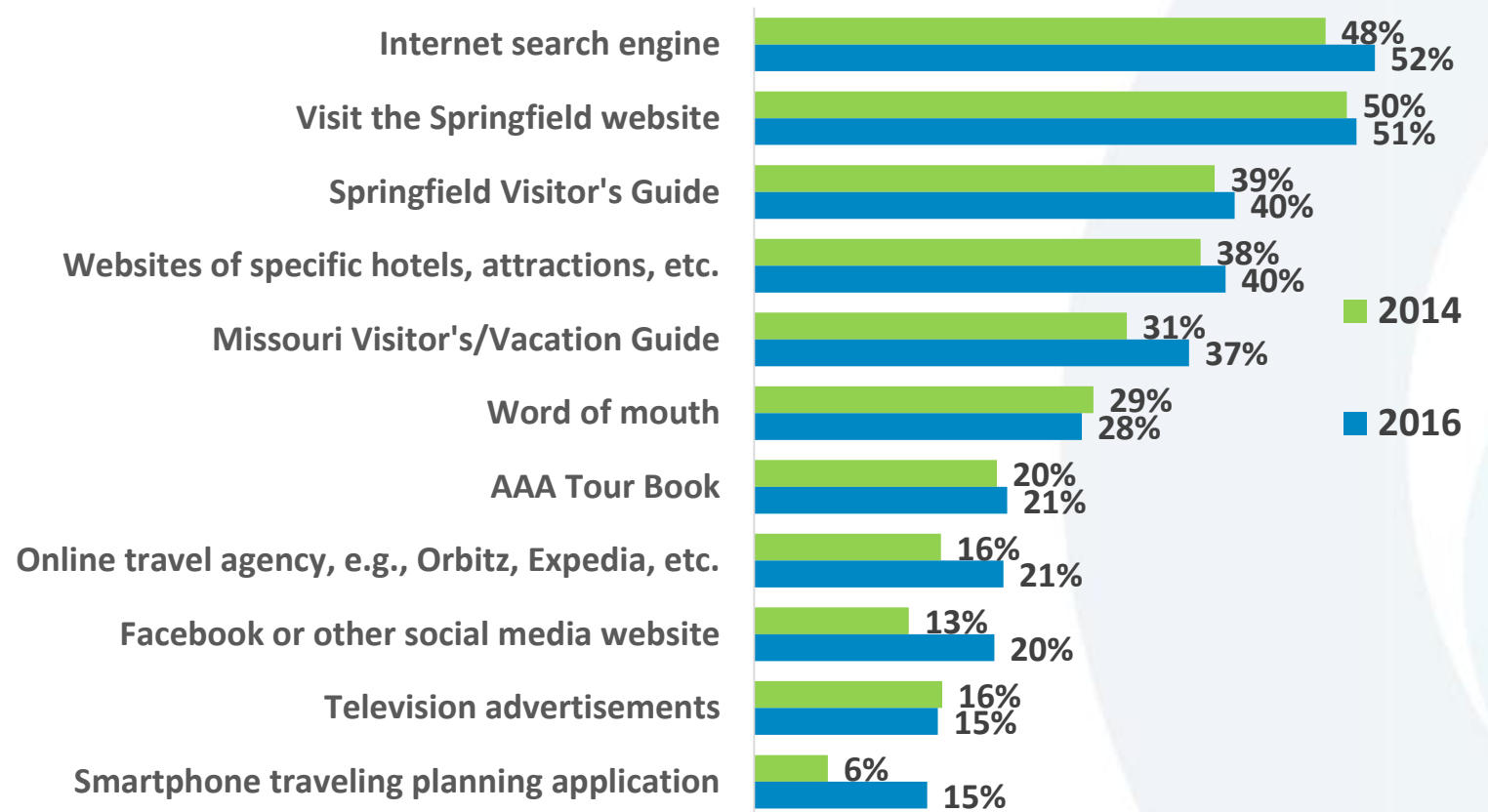
Q25: Based on your current perception of Springfield, MO, please rate the following statements on the degree to which you feel each describes the city.

Advertising awareness increased significantly (+14%) over 2014, and the top travel planning resources for trips to Springfield continue to include Internet search engines and the Springfield website.

Advertising Awareness



Top Travel Planning Resources



Q21: Do you recall seeing or hearing any advertisements or news stories for Springfield, MO in the past six months?

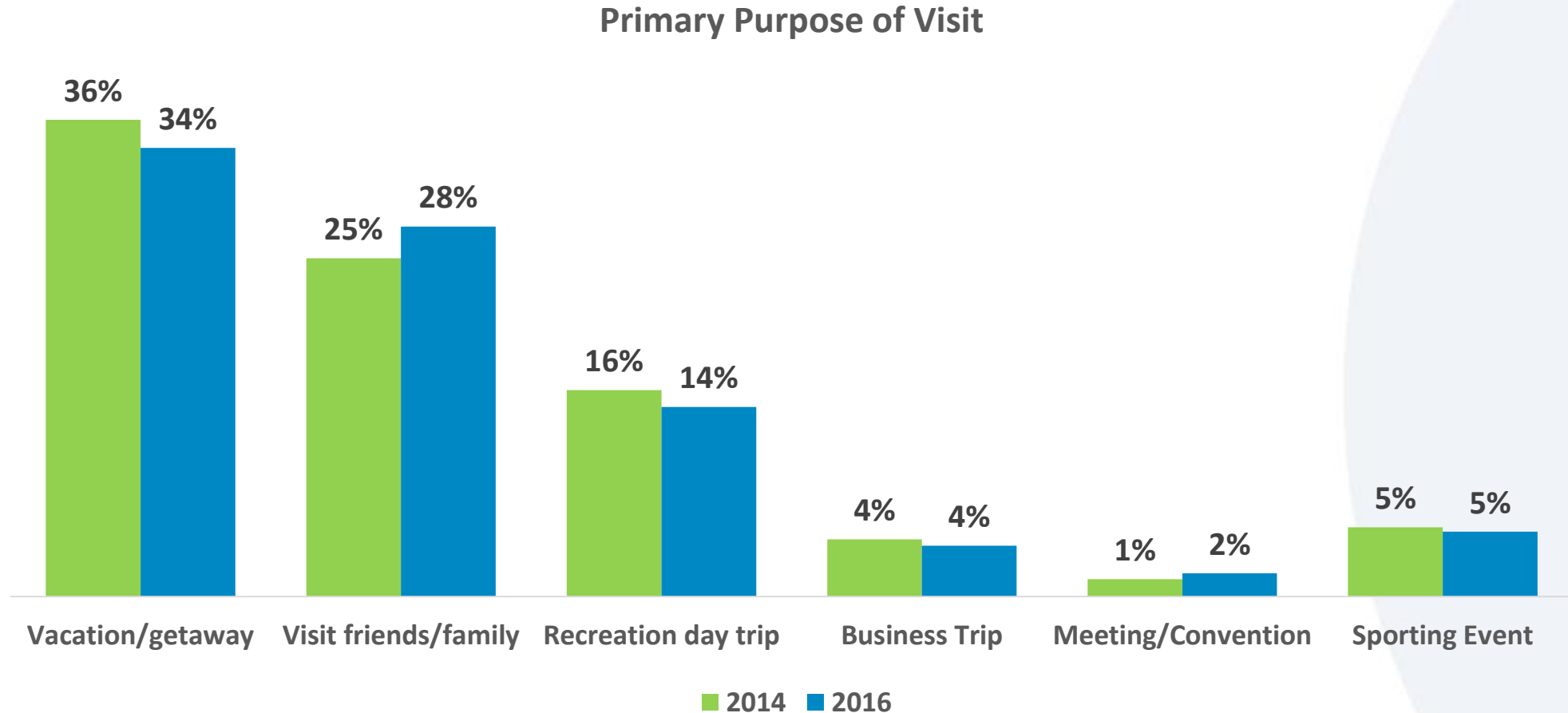
Q22: Which of the following sources would you be most likely to use if planning a visit to Springfield?

Visitor Behavior & Satisfaction

- + *Purpose of Visit*
- + *Emotional Drivers*
- + *Overnight Visitation*
- + *Satisfaction*
- + *Brand Strengths & Unmet Needs*
- + *Brand Promise*
- + *Demographics*

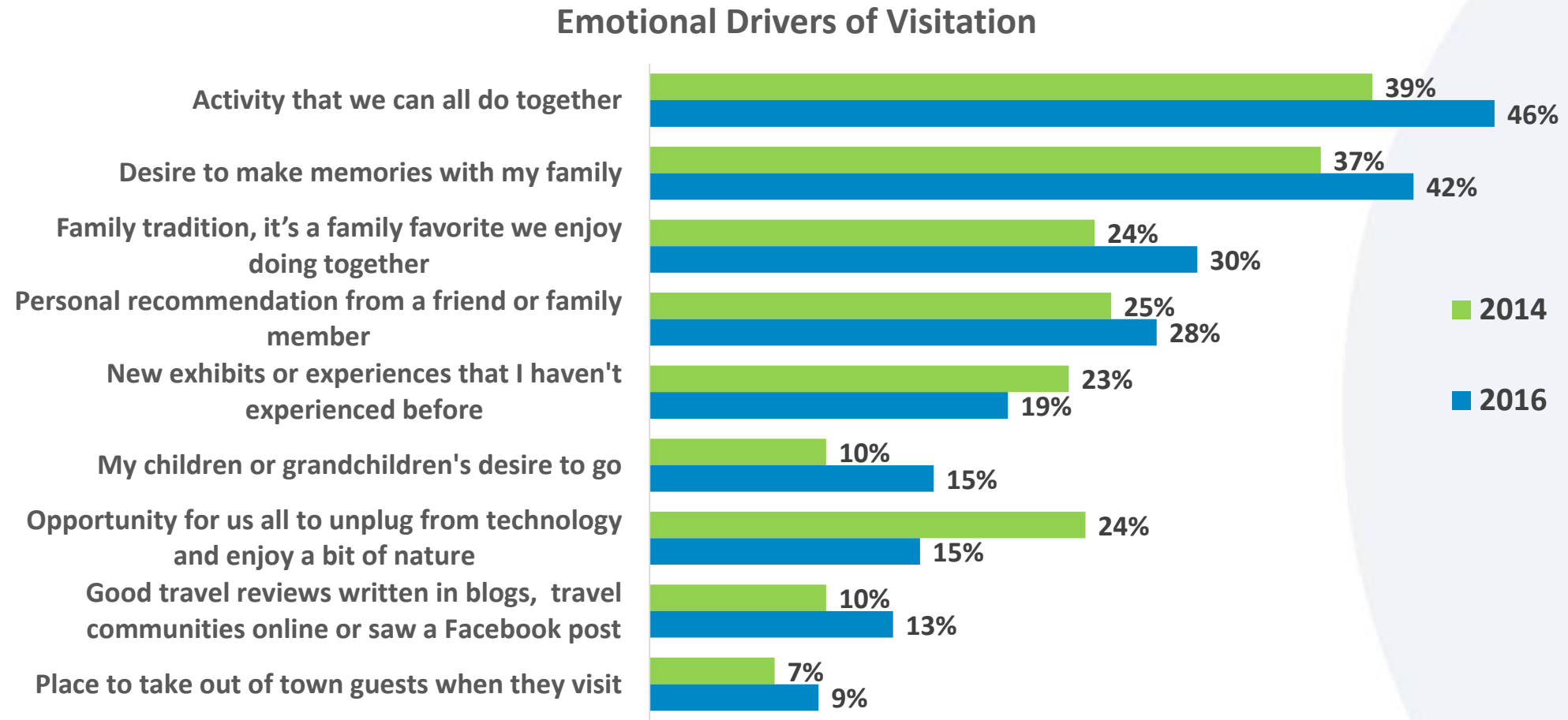
03

Vacations continue to be the primary reason travelers visit Springfield; however, there was a slight uptick in friends/family visitation as well as meeting/convention visitation.



Q12: What was the primary purpose of your trip to Springfield, MO the last time you visited?

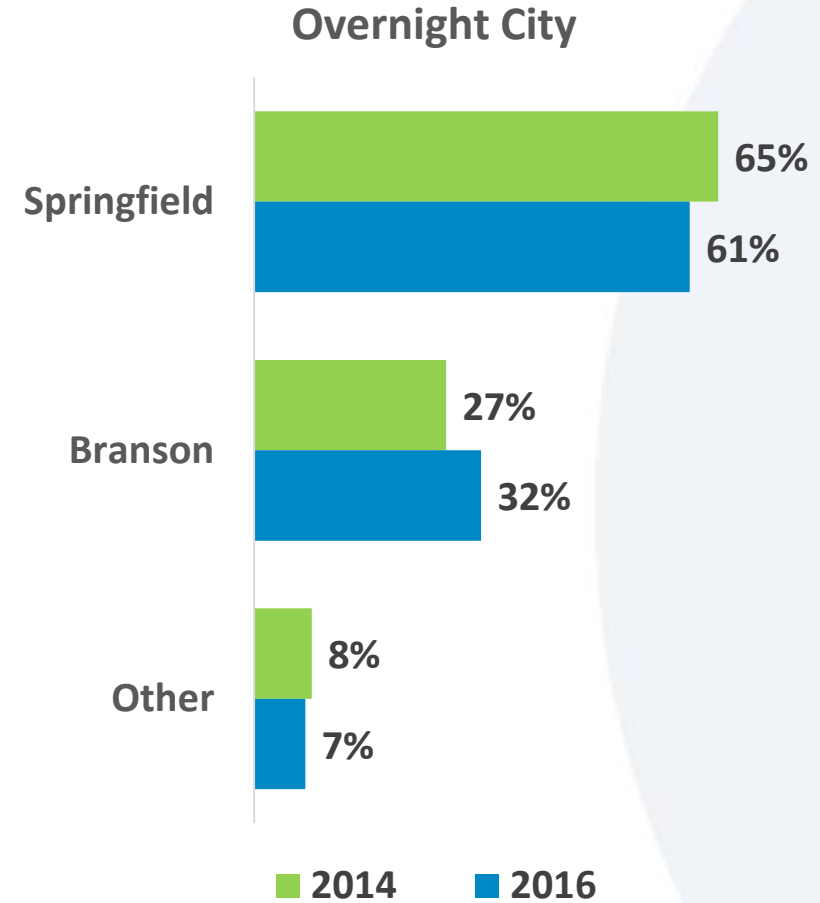
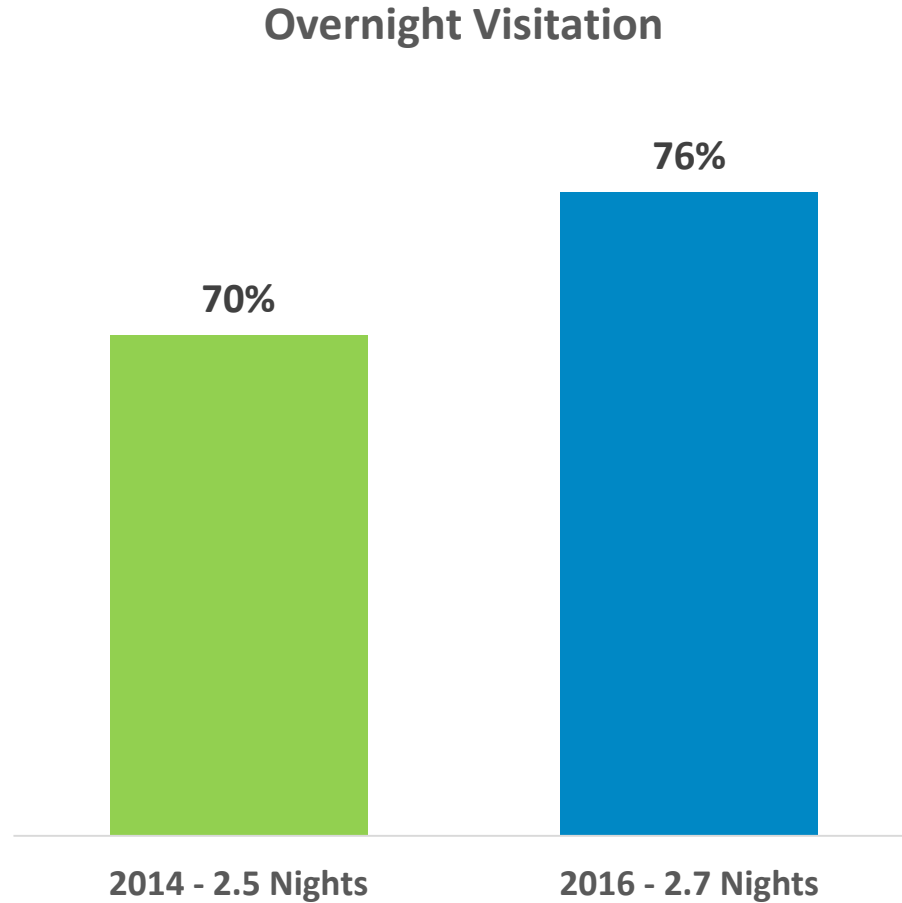
The chance to spend time together with family continues to be the primary emotional driver of visitation to Springfield.



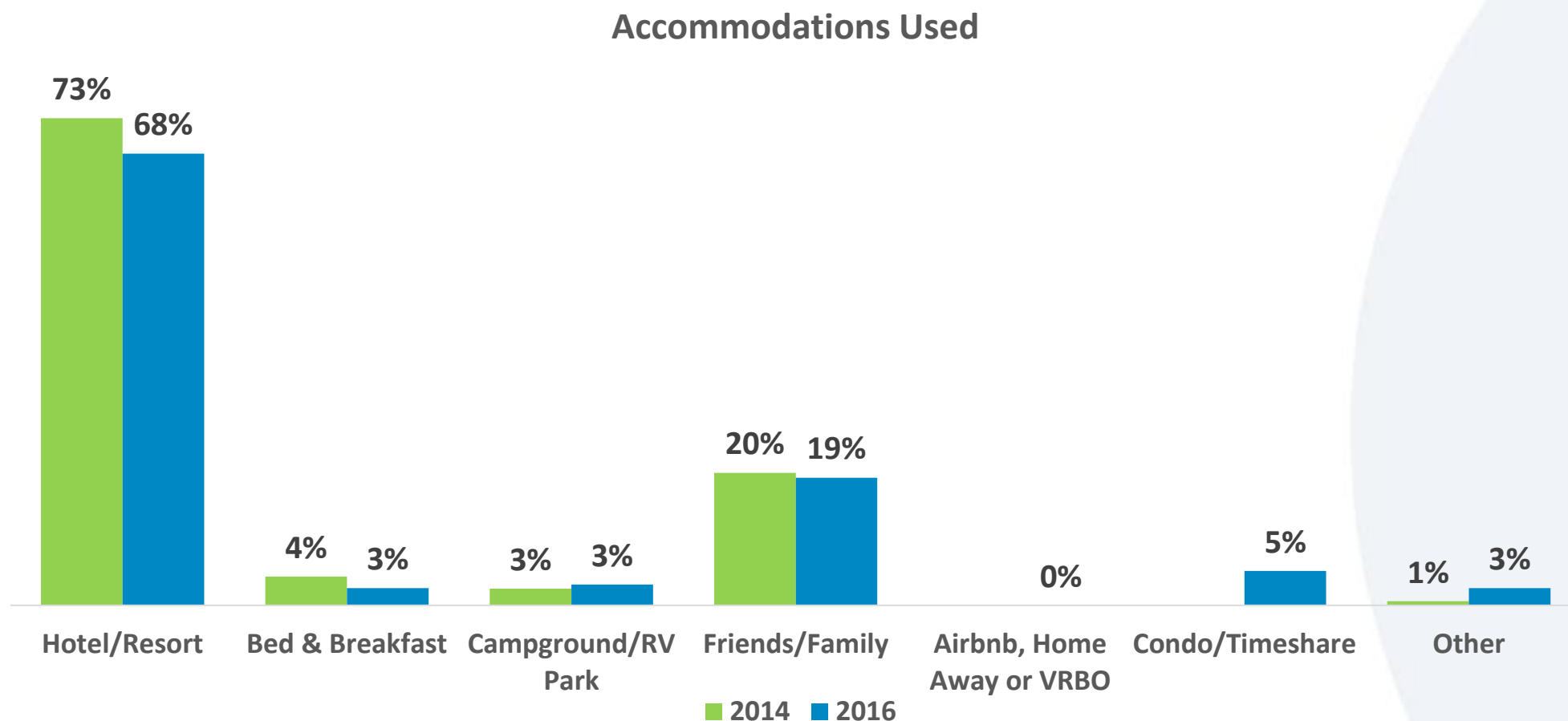
Q13: Which of the following would you say played a significant role in motivating or inspiring you to visit Springfield, MO on this particular occasion?
Please select your top 3 choices.

RESPONDENT BASE: 2016 RESPONDENTS VISITED SPRINGFIELD FOR LEISURE | N=272
2014 RESPONDENTS VISITED SPRINGFIELD FOR LEISURE | N=219

Overnight visitation to Springfield increased since 2014 (+6%). However, more visitors have been spending nights in Branson than they did in 2014.



There was a dip in the number of overnight visitors using hotels/resorts for their stay this year, in favor of the new options for condos/timeshares.



Q18: Which of the following best describe the accommodations you used for that stay?

Springfield visitors say they are most satisfied with the variety of things to do, charming local restaurants and friendliness of the people.



79%
Variety of Things to Do
(+1%)

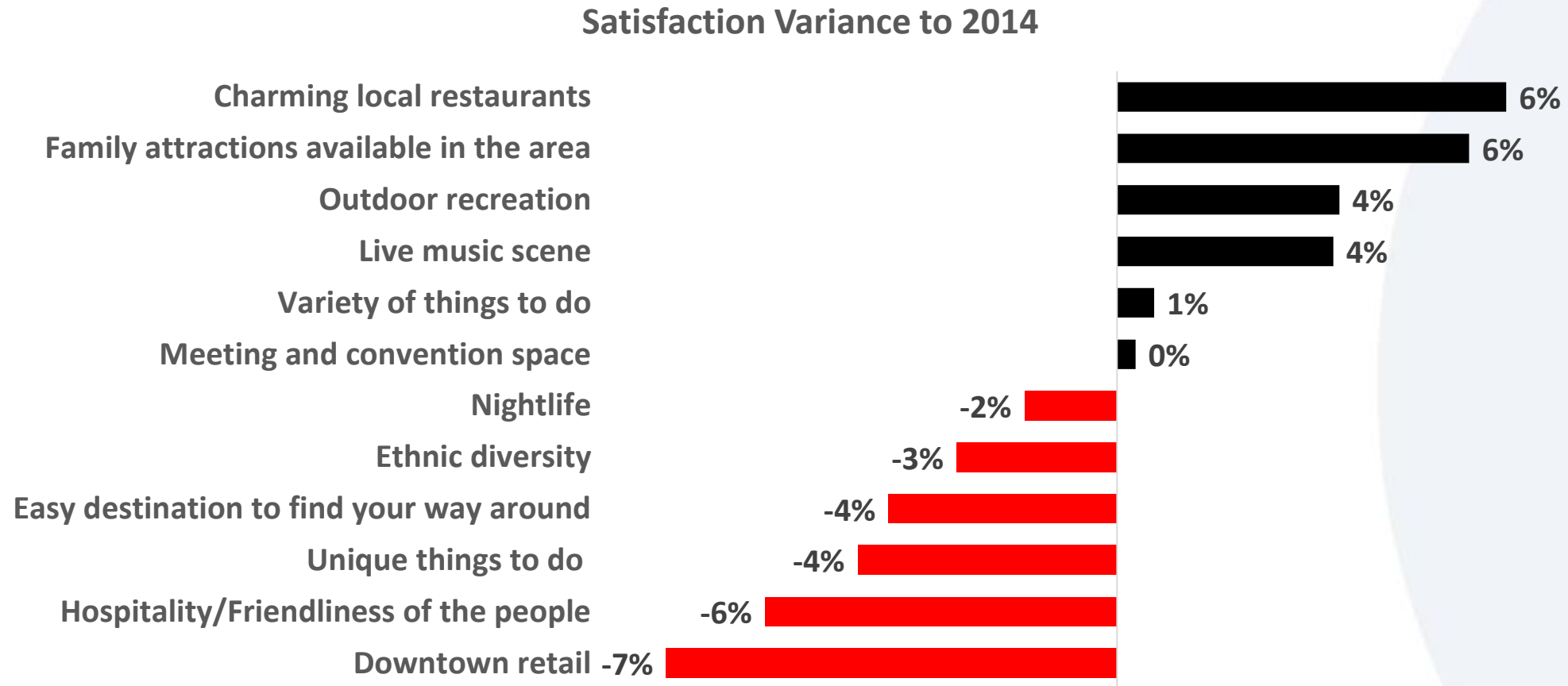


77%
Charming Local Restaurants
(+6%)



77%
Hospitality/Friendliness Of the People
(-6%)

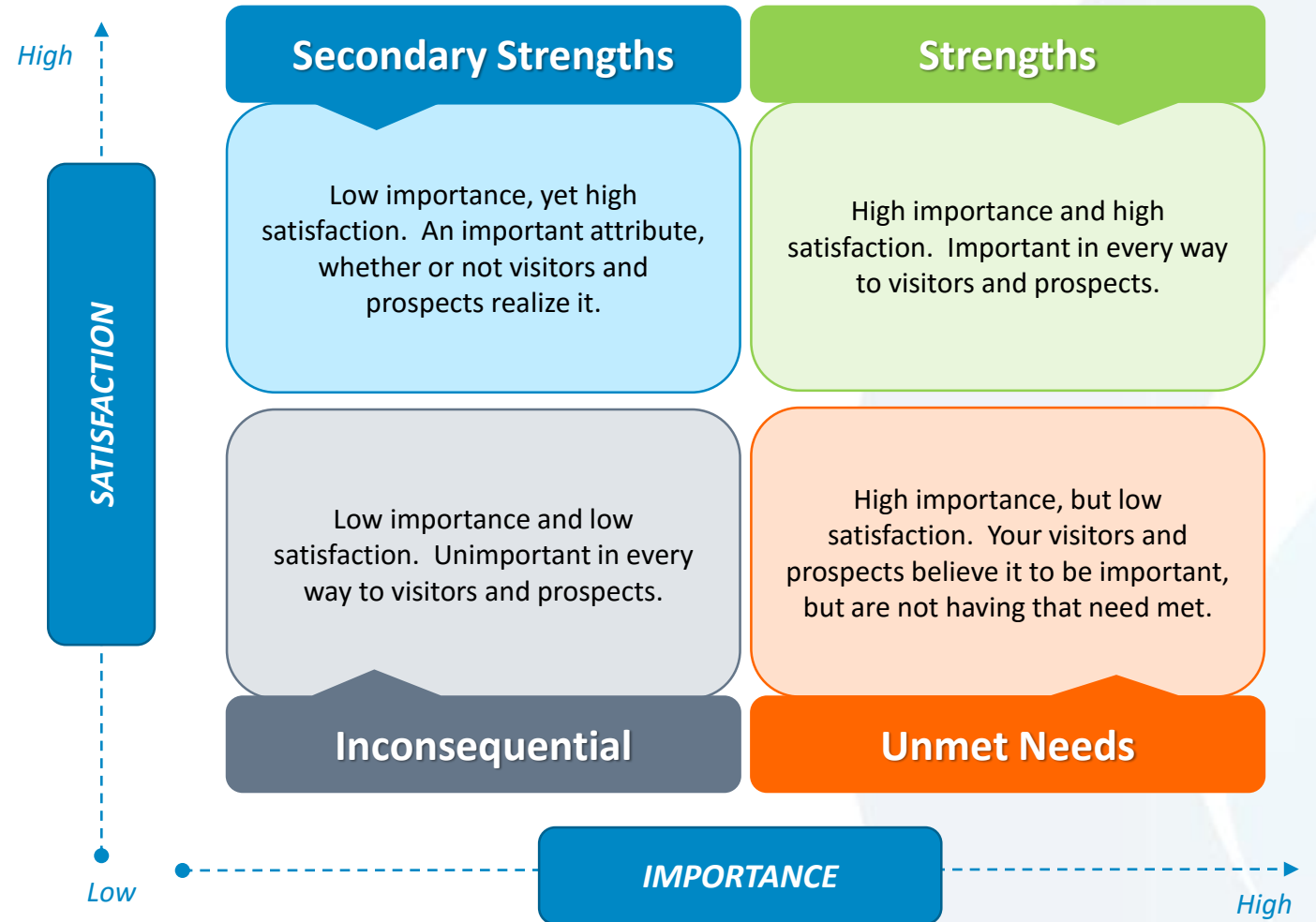
Satisfaction with restaurants and family attractions increased significantly over 2014. However, satisfaction with downtown retail and hospitality both decreased.



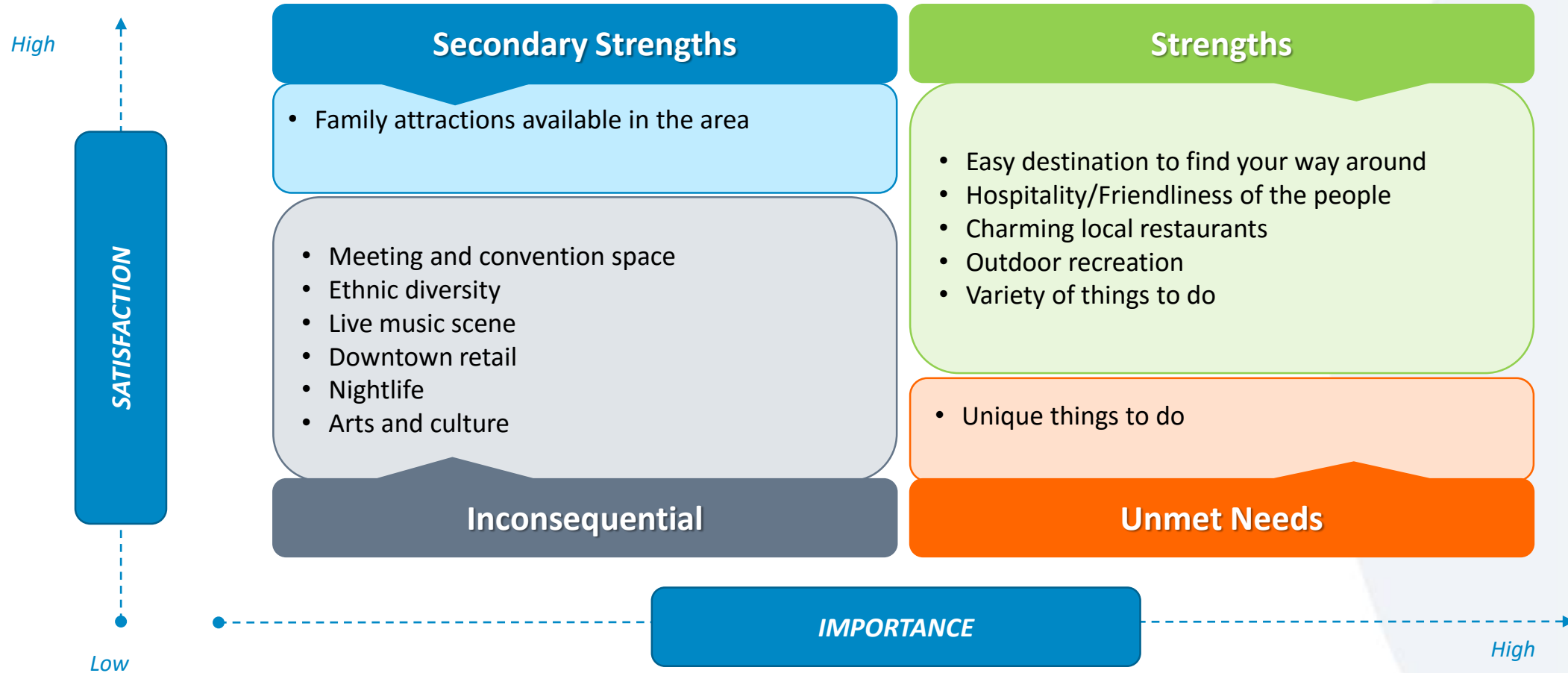
Identifying Brand Strengths & Unmet Needs

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

The resulting analysis illustrates which elements of satisfaction are most important by plotting 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.

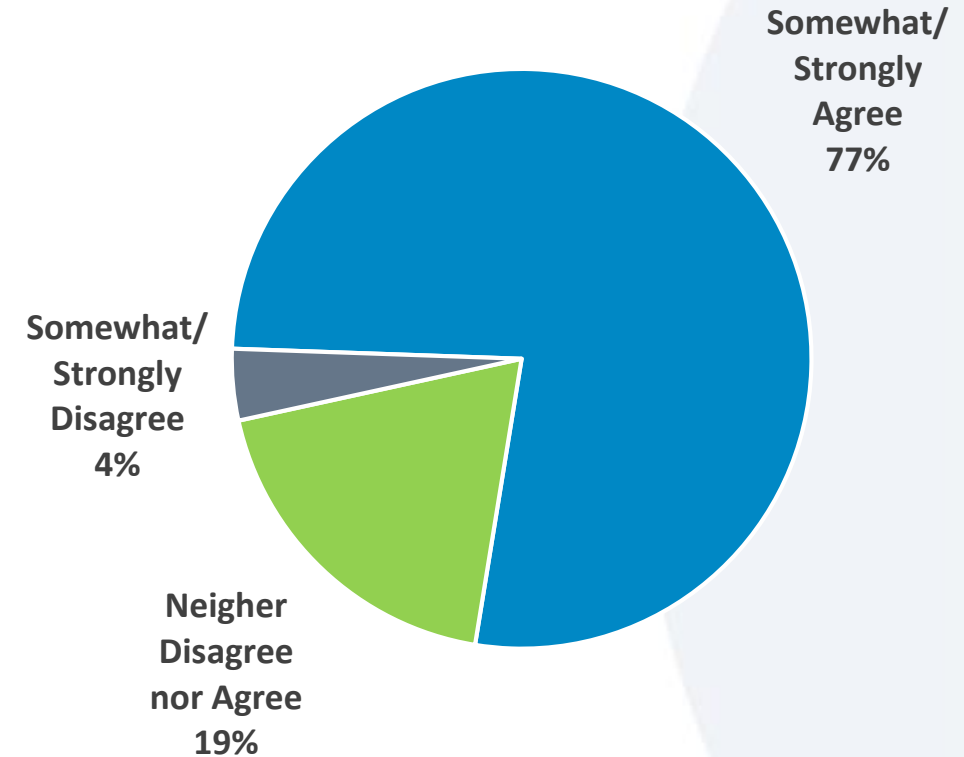


Q19: Using the scale provided, please rate how satisfied you were with following characteristics of Springfield, MO as a travel destination.

More than three-quarters of 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



Non-Visitors are very similar to recent visitors. They are just slightly younger, have a little lower household income and live farther away.

| | Overall | 2016 Brand Advocates* | Recent Visitors (past 3 yrs.) | Non-Visitors |
|---------------------------|-----------|-----------------------|-------------------------------|--------------|
| Average Adult HH Age | 47.3 | 47.5 | 48.7 | 44.4 |
| Adult Households | 41% | 39% | 41% | 41% |
| Family Households | 59% | 61% | 59% | 59% |
| % Caucasian | 90% | 93% | 93% | 85% |
| % Minority | 10% | 7% | 7% | 15% |
| Household Size | 2.9 | 2.9 | 3.0 | 2.8 |
| HH Income | \$69.1k | \$69.2k | \$71.0k | \$67.9k |
| Distance from Springfield | 187 miles | 161 miles | 158 miles | 213 miles |

**Brand Advocates are those visitors who rated the NPS for Springfield a 9 or 10 and indicated they would be likely/very likely to return to the area.*

Thank You!



agaroutte@h2rmarketresearch.com
jmowris@h2rmarketresearch.com



417.877.7808



1717 E Republic Road, Suite C
Springfield, MO 65804



@H2RMktResearch



H2R MARKET RESEARCH

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