



Convention & Visitors Bureau

2016 Marketing & Media Effectiveness Study

Prepared by



Project Overview

PURPOSE

The purpose of this study was to measure the impact Springfield Convention & Visitors Bureau's (SCVB) 2016 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 2015 campaign for context, where applicable, as well as the H2R Industry Norm.

TARGET AUDIENCE

The Springfield 2016 Marketing & Media Effectiveness Study was conducted among travelers living in the St. Louis, Kansas City and Tulsa DMAs, as well as travelers living within a 500 mile radius of Springfield. The research was conducted in October of 2016 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 1,507 respondents were interviewed for this Marketing & Media Effectiveness study. This sample size provides for a maximum margin of error of +/-2.5% at a 95% confidence interval overall.

Advertised Markets



- The sample for the 2016 Marketing & Media Effectiveness study was garnered from 3 Spot Markets (Kansas City, St. Louis & Tulsa) 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: 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 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.

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Executive Summary

Marketing Efficiency

- Overall awareness of the Springfield Convention & Visitors Bureau's (SCVB) 2016 campaign reached 52% of travelers which equates to approximately 11.1M aware traveler households across the region. Both awareness of the campaign and gross market reach increased over 2015 levels.
- With a media investment of approximately \$844k this year, SCVB's cost per aware household averaged just \$0.08 which is considerably lower than the \$0.11 spent last year. In the travel industry, anything below \$1.00 is considered acceptable and anything below \$.50 is very good.
- Efficiently reaching new travelers is important to any destination, but a marketing campaign is considered successful when travelers who were reached by the ads had a higher level of visitation than those who did not see or hear any of the DMO's ads.



Advertising Impact

- SCVB's marketing campaign accomplished that objective this year by impacting visitation in all four market tiers surveyed: Tier 1 (51-150 miles): +0.4%, Tier 2 (151-225 miles): +0.6%, Tier 3 (226-400 miles): +1.1% and Tier 4 (401-500 miles): +1.4%. Overall, aware travelers had a level of visitation to Springfield that was 1.1 points higher than that of those who did not recall seeing/hearing any SCVB marketing messages.
- Extrapolating these figures across comparable aware travel households in each market tier, it is estimated the SCVB impacted 123k trips and influenced \$73.6 million in travel revenue for the area.
- Overall, the campaign generated a ROI of \$87, slightly higher than the H2R Industry Norm. That is, the SCVB campaign generated an impact of \$87 in travel spending for every \$1 that was invested in marketing.



Advertising Evaluation

- More than 7 in 10 travelers indicated SCVB's marketing messages made the Springfield area seem more appealing as a destination, a 3 point increase over 2015. Likewise, the campaign's relevance (+4%), brand fit (+5%) and differentiation from other destination ads (+6%) all experienced YOY increases.
- The marketing messages that resonated most with travelers were variety of things to see and do and being a great place to vacation. More importantly, the ads persuaded travelers to search online for things to do in the area (52%) and to visit the official Springfield travel website (49%). All post-ad traveler actions posted increases over the levels recorded in 2015.
- Perhaps most importantly, however, the campaign also increased travelers' post-exposure intent to visit Springfield by 15 points. This is slightly better than last year and well above the H2R Industry Norm of 7%.



Springfield Visitors

- More than half of Springfield's recent visitors indicated they would recommend Springfield as a leisure destination to their friends/family members. With a comparatively low ratio of brand detractors (16%), Springfield's Net Promoter Score reached 40%, exceeding the H2R Industry Norm of 29%.
- Springfield's most popular time for visitation continues to be in the peak season or April-September timeframe—35% of past visitors (in the past three years) reported visiting during this time of year.
- The top activities that Springfield's visitors indicated visiting or participating in this year were Shopping (61%) and Bass Pro Shops (30%). And, similar to last year, the top drivers to the area were once again Shopping, Bass Pro Shops and Museums/Cultural Events.



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
Impacted Travel	+1.5%	+1.1%	+4.4%
Impacted Trips	110k	123k	46k
Impacted 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

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

Marketing Efficiency

- + *Aided Paid Media Awareness*
- + *Marketing & Media Reach*
- + *Marketing Efficiency*

01

MARKETING EFFICIENCY KPIs



52% of travelers saw or heard an SCVB advertisement



The 2016 Campaign reached **11.1M** households

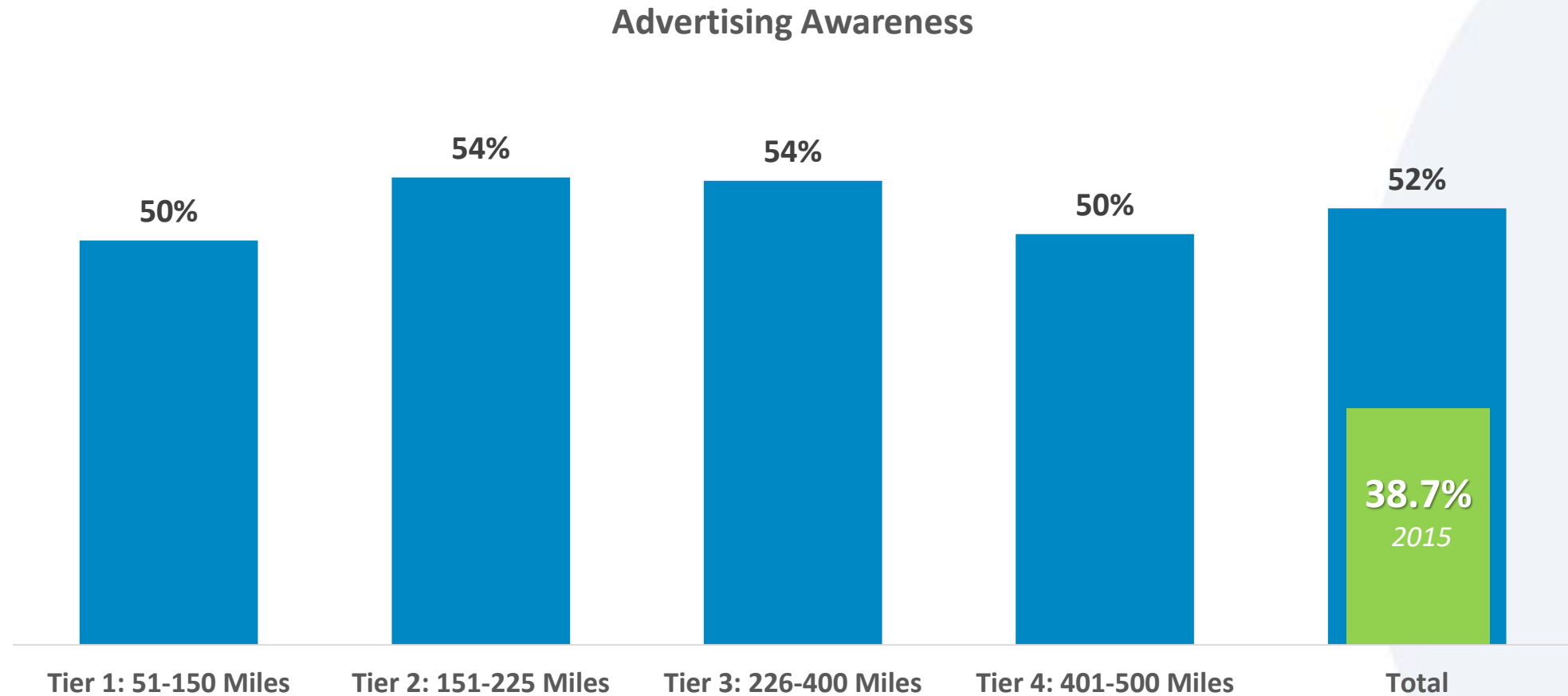


The total cost per aware household averaged **\$0.08**



SCVB invested **\$844k** in advertising for the 2016 Campaign

The 2016 campaign generated awareness from 52% of the target market with fairly even coverage across every market tier.



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)

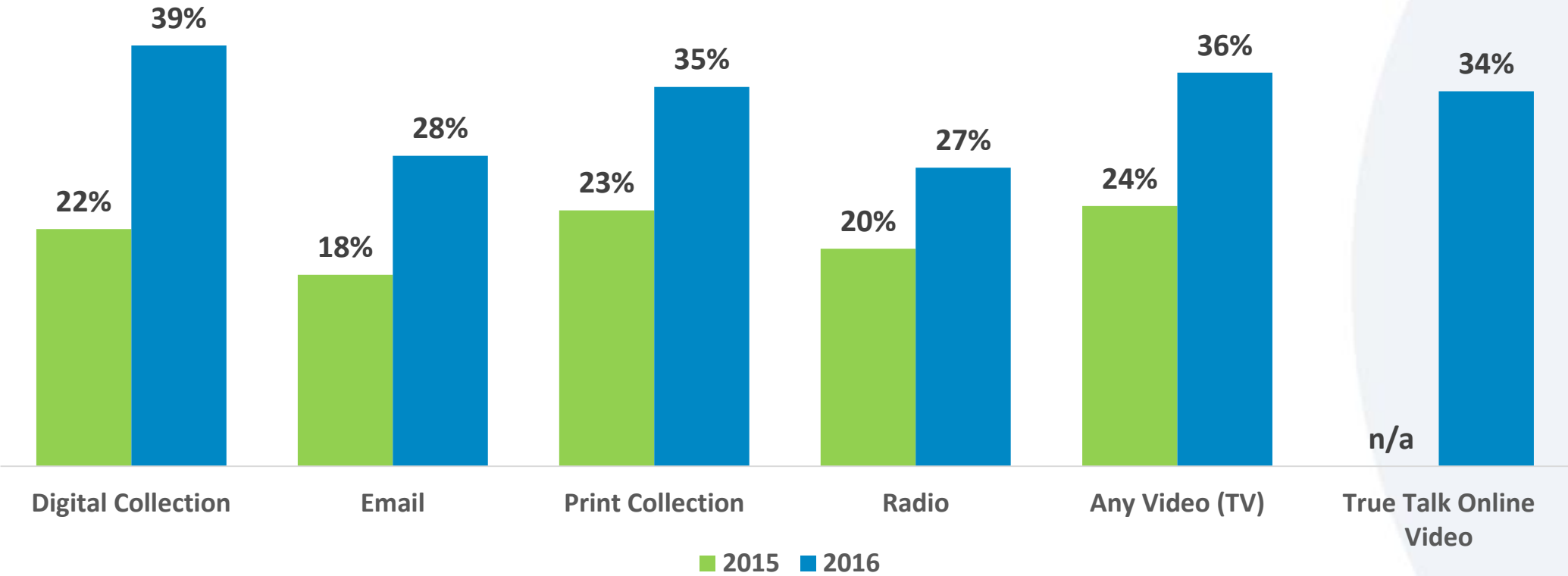
SCVB's 2016 marketing campaign efficiently reached travelers in these target markets at a cost of just \$0.08 per aware travel household.

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 which is \$0.03 less than the \$0.11 spent last year. Likewise, it is also much better than the H2R Industry Norm (\$0.36).

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

Marketing awareness increased across all media tested—with Digital and Videos posting the largest gains.

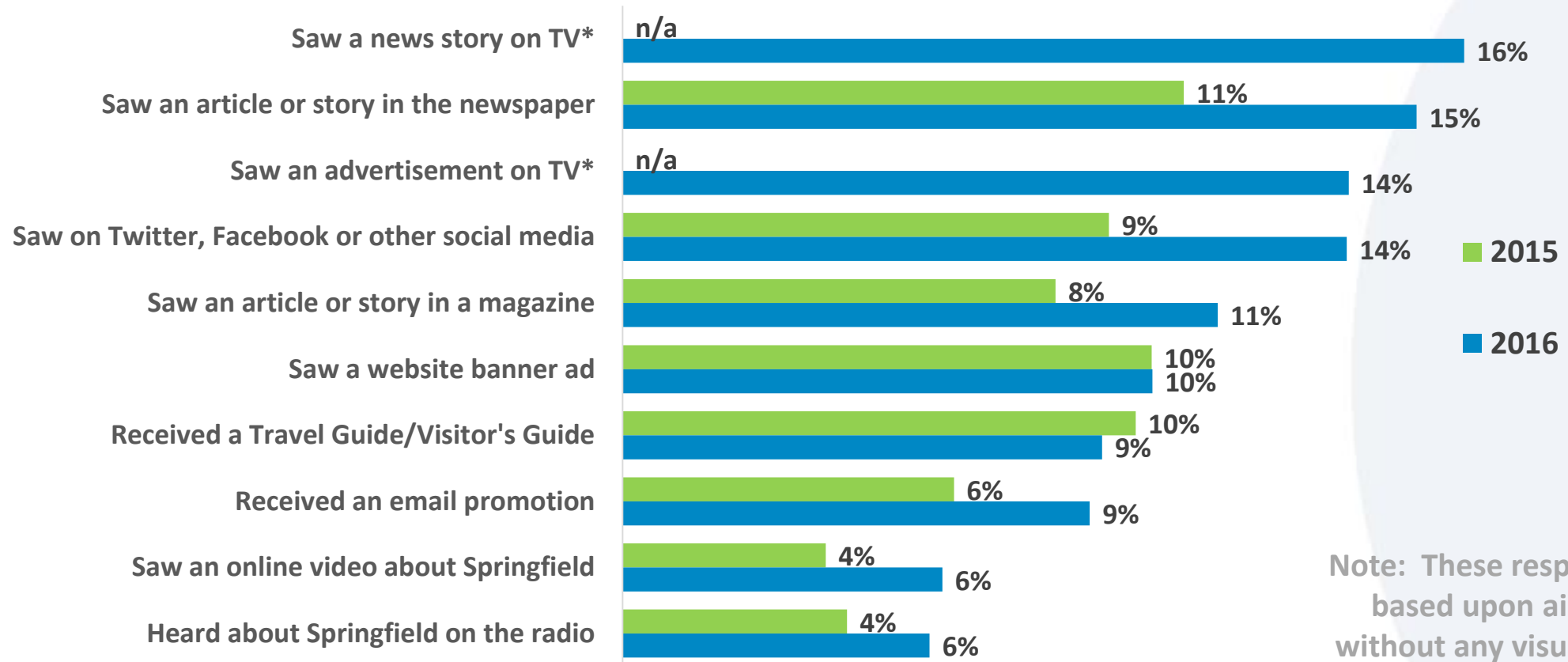
Advertising Awareness by Medium



Q24-30: Have you seen this advertisement or one similar?

Assisted recall for television, newspaper stories, social media magazine articles, emails, online videos and radio promotions all also increased this year.

Information Saw/Heard About Springfield, MO

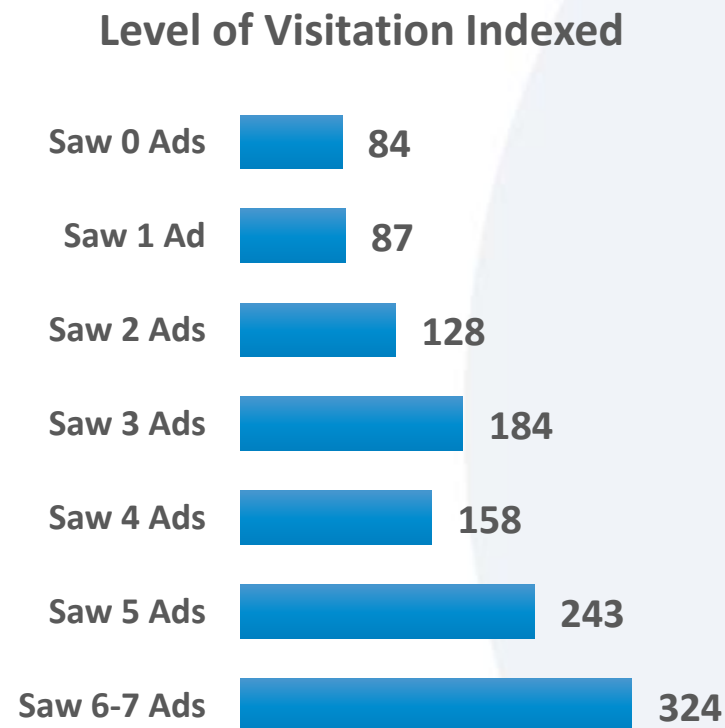
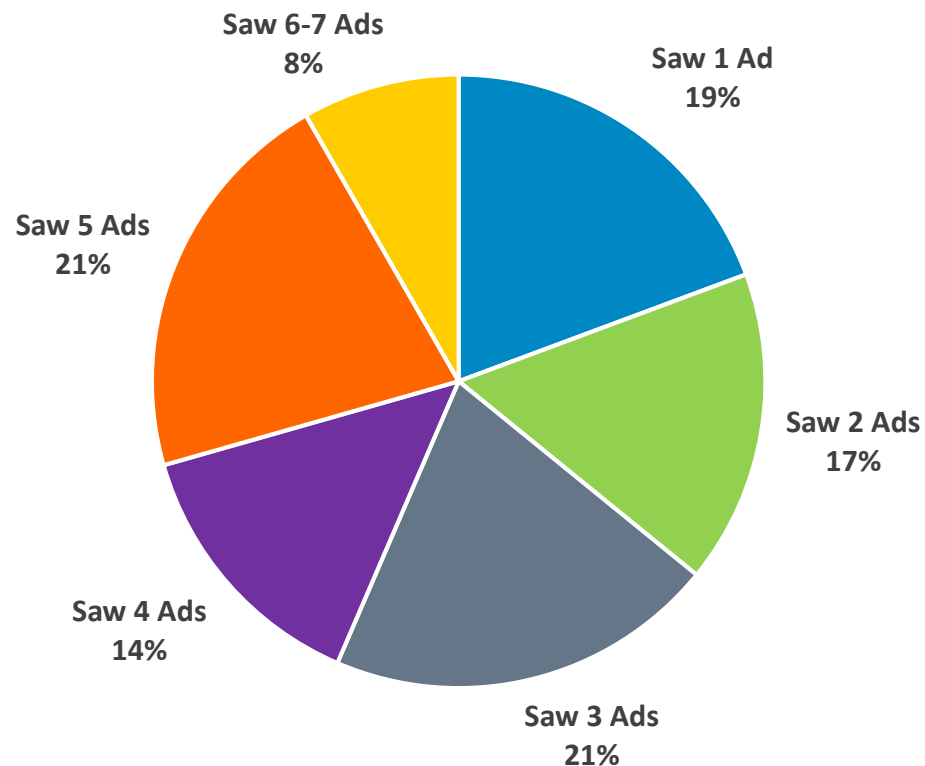


Note: These responses are based upon aided recall without any visual stimuli.

*These two options replaced "Saw something about Springfield on TV" (11%) from 2015

Q23: 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 delivers increased visitation. The more SCVB ad exposures travelers recalled, the more likely they were to have visited Springfield in 2016.



Advertising Impact

- + *Impacted Travel*
- + *Impacted Trips*
- + *Impacted Travel Spending*
- + *Return on Investment (ROI)*

02

ADVERTISING IMPACT KPIS



SCVB'S 2016 campaign
impacted **123k** trips



\$73.6 million was generated
from those trips



Campaign impacted **226k**
Springfield hotel room nights



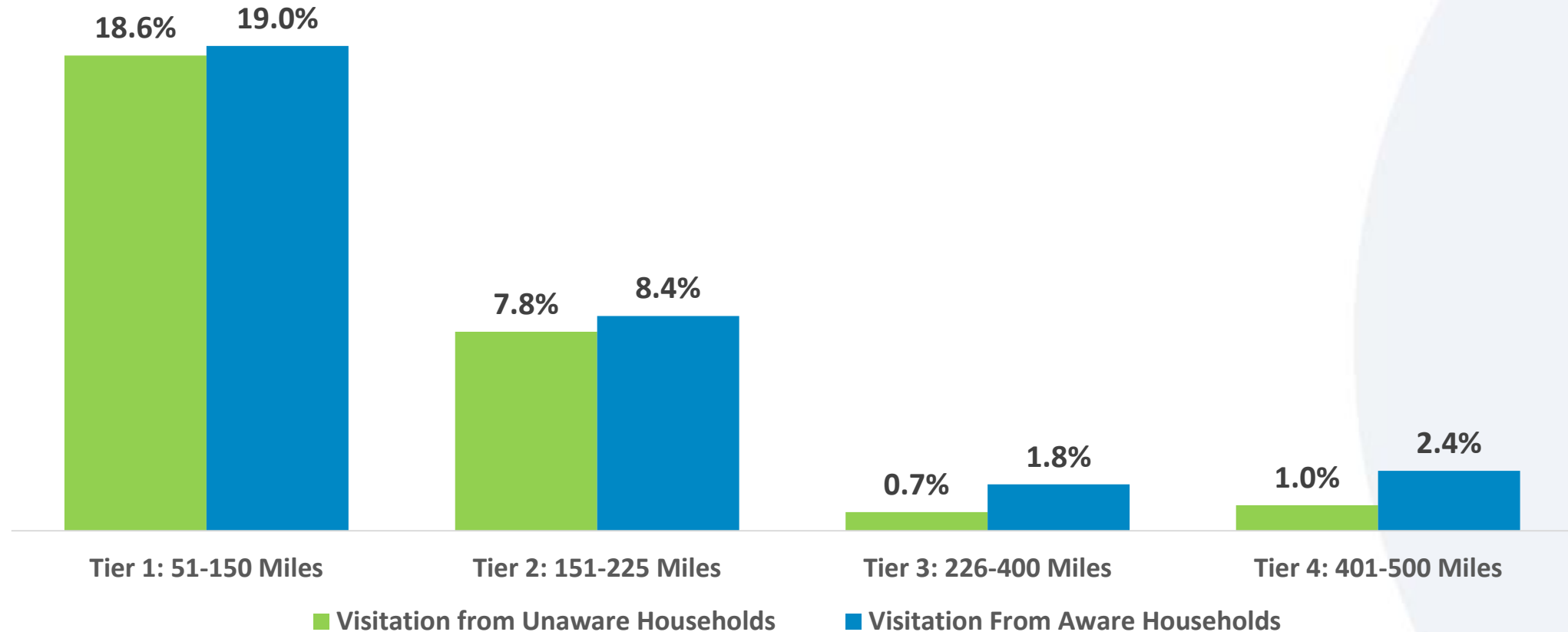
SCVB invested **\$844k** in
marketing media



ROI was \$87

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

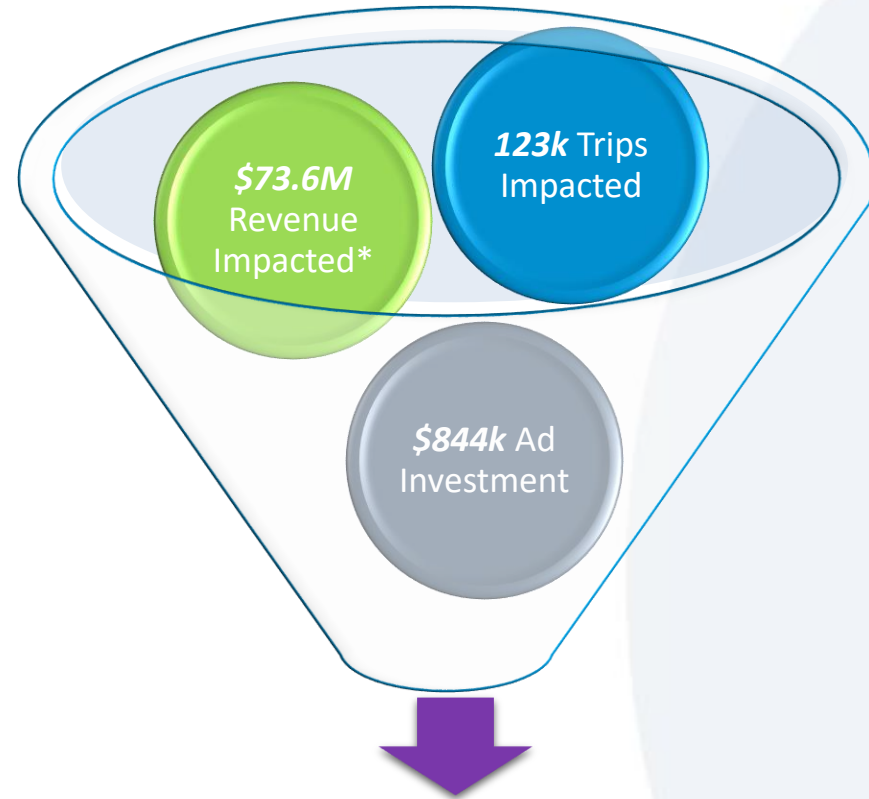
Impacted travel is the difference in visitation between those households who were aware of the SCVB's advertising and those who were not. Impacted trips is the percentage of impacted travel multiplied across the number of aware travel households in the target market.

Market	Total Market Reach	Impact	Impacted 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



\$87 Return on Investment

*Impacted revenue is revenue generated that, without advertising, may not have occurred.

Traveler Spending Impacted

The 123k trips the Springfield CVB impacted 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	Impacted HH Trips	Travel Spending per Party	Impacted 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

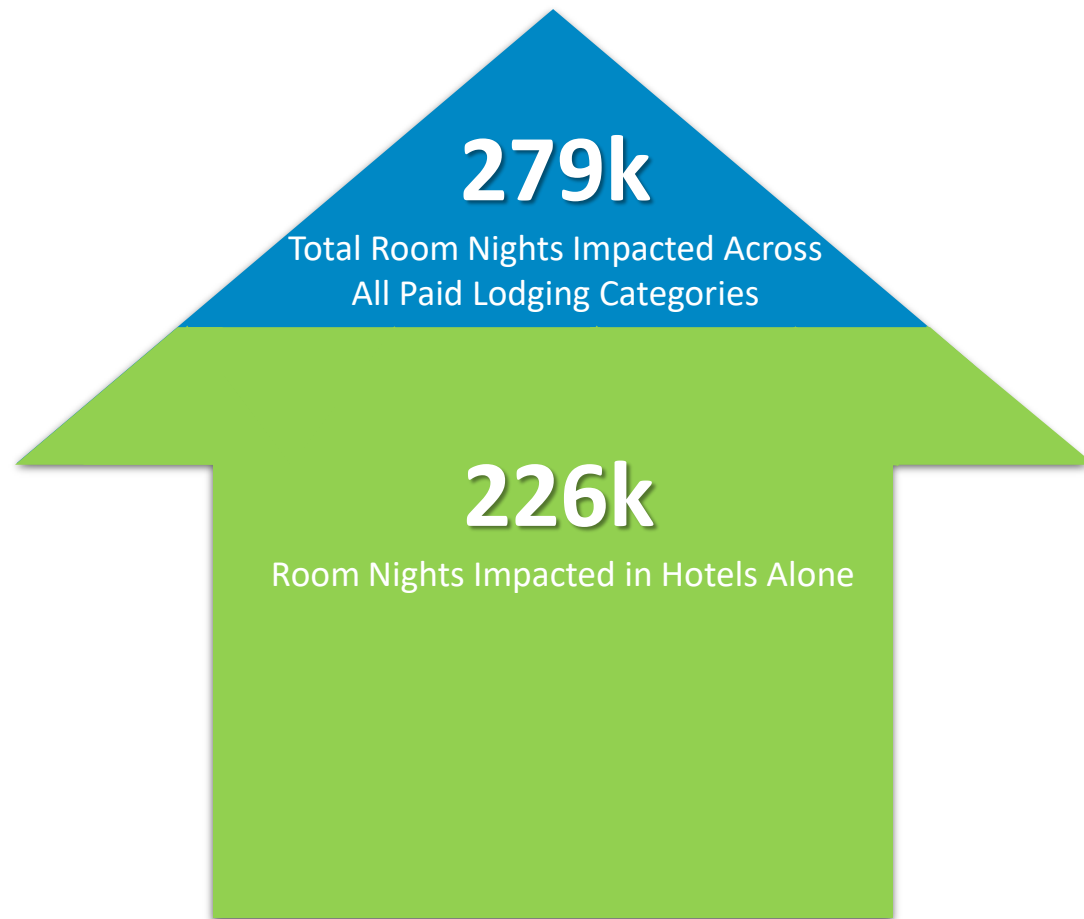
Return on Investment

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

This means that the campaign generated \$87 in impacted 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	Impacted 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 Room Nights/Units Impacted



The SCVB Campaign influenced more than 361k room nights across lodging categories for the entire region with more than 273k of those being in hotels. More than 77% of those occurred in the city of Springfield, reflected in the graphic above.

The 2016 Campaign impacted more than 279k *total room nights/units* among those who stayed overnight in paid accommodations in Springfield, MO. (Hotel room nights accounted for 226k of this number.)

Extrapolated across the number of rooms purchased, length of stay and those spending the night in Springfield; it is estimated that the 2016 Campaign influenced approximately 18% of the total commercial room nights/units purchased by Springfield area visitors.

Impacted Paid Accommodation Room Nights Spent in Springfield, MO

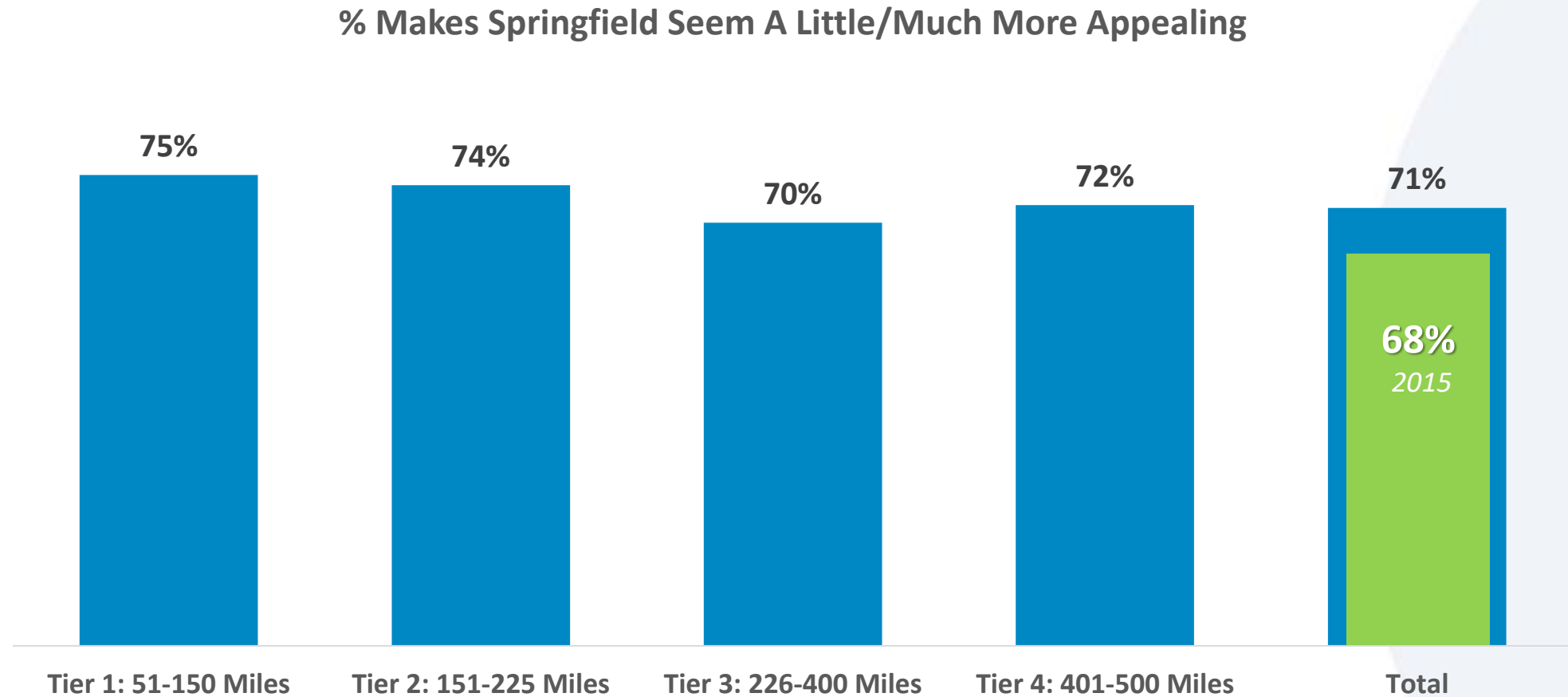
Total Commercial Room Nights	2015	2016	Hotel Only Room Nights	2015	2016
Total Number of Impacted Stays (000s)	110k	123k	Total Number of Impacted Stays (000s)	110k	123k
% staying overnight in commercial lodging in area	65%	63%	% staying overnight in <u>Hotels</u> in area	54%	56%
Overnight Impacted Stays (000s)	71.7	77.5	Overnight <u>Hotel</u> Impacted Stays (000s)	59.1	68.5
No. of rooms/units used by visitors	1.40	1.45	No. of rooms/units used by visitors	1.24	1.45
Impacted Rooms/Units Used (000s)	100.4	112.6	Impacted <u>Hotel</u> Rooms/Units Used (000s)	73.0	99.5
Length of stay/nights in SW MO	3.05	3.21	Length of stay/nights in SW MO	2.16	2.94
Total Area Lodging Impacted Room Demand (000s)	306.8	361.3	Total Area <u>Hotel Only</u> Impacted Room Demand (000s)	157.7	292.5
% staying in Springfield, MO	67%	77%	% staying in Springfield, MO	67%	77%
Total Springfield-Only Lodging Impacted Room Demand (000s)	206.2	279.2	Total Springfield <u>Hotel Only</u> Lodging Impacted Room Demand	105.9	226.0

Marketing Evaluation

- + *Ratings of Creative Appeal*
- + *Impact on Consumer Behavior*
- + *Marketing Messages' Impact on Intent to Visit*

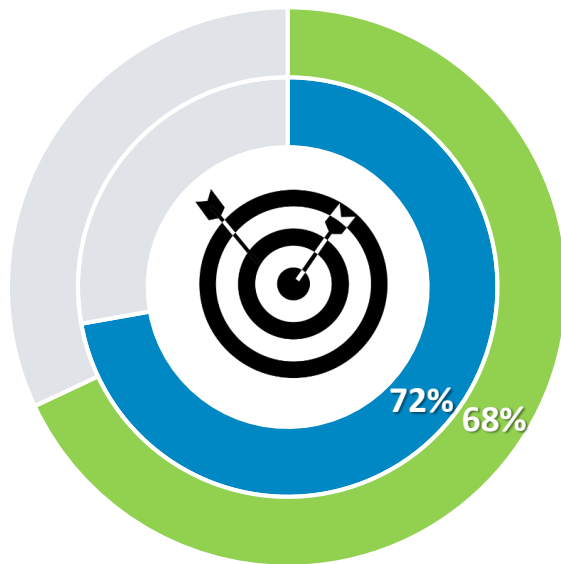
03

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.

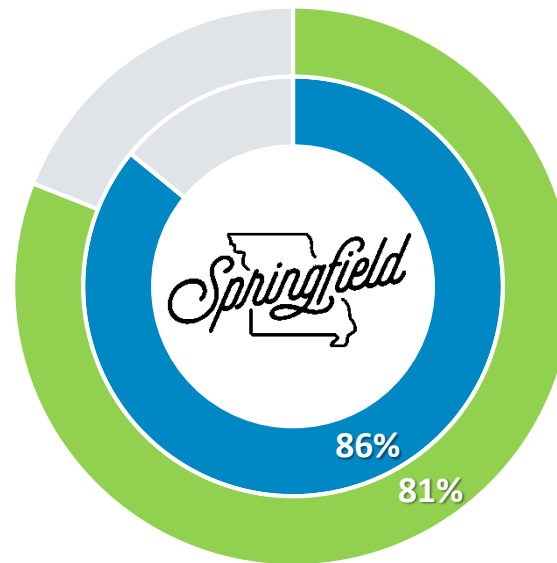


Marketing relevance, brand fit and differentiation from other destination advertising all recorded higher scores this year.

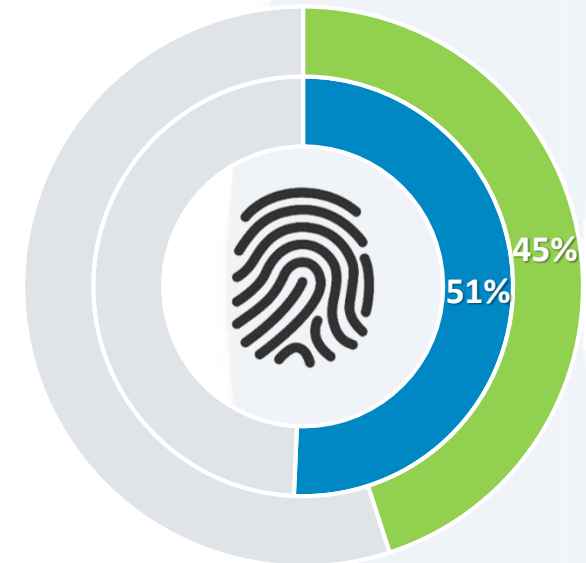
% Somewhat/Very Relevant



% Fits Brand Somewhat/Very Well



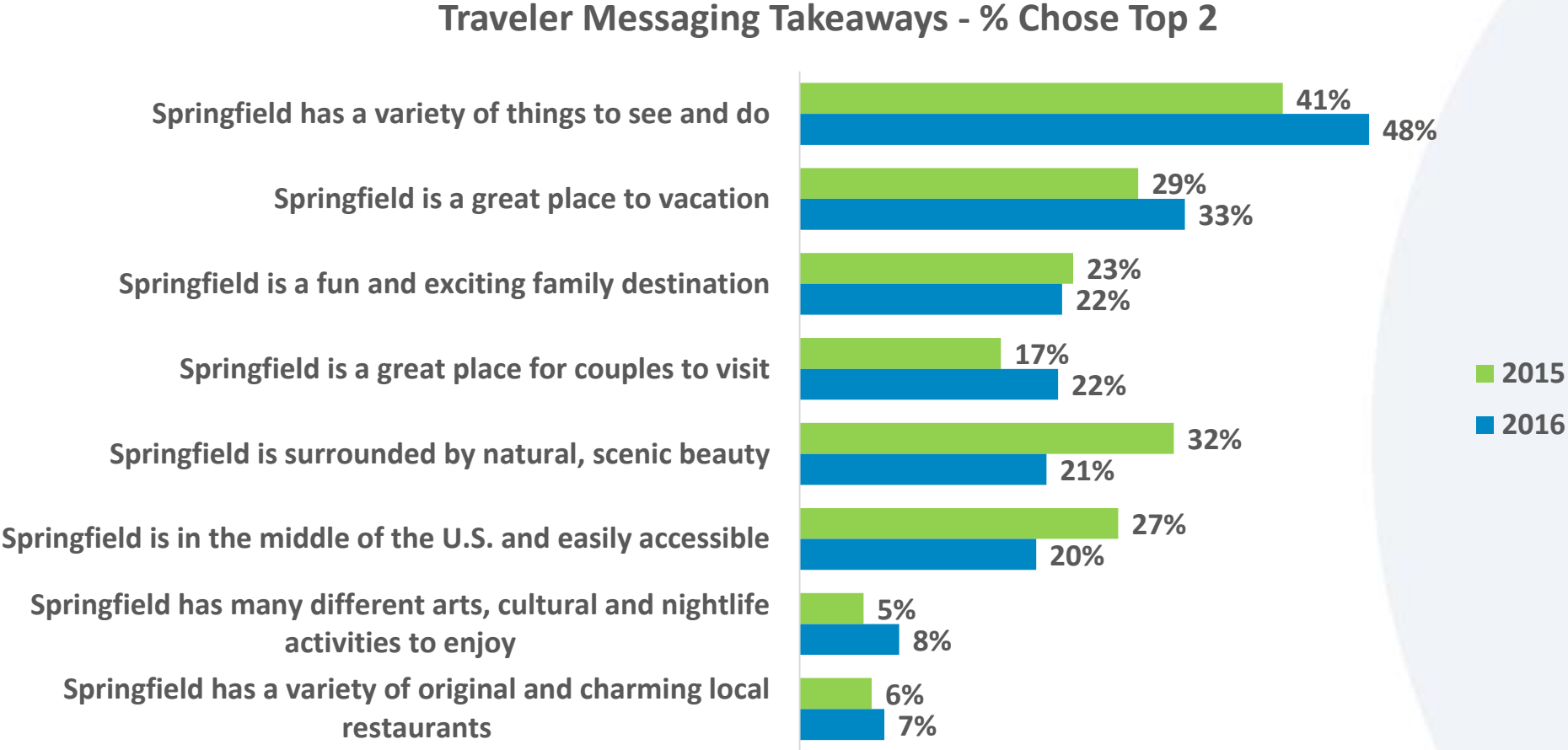
% Pretty/Much Different than Other Ads



■ 2015 ■ 2016

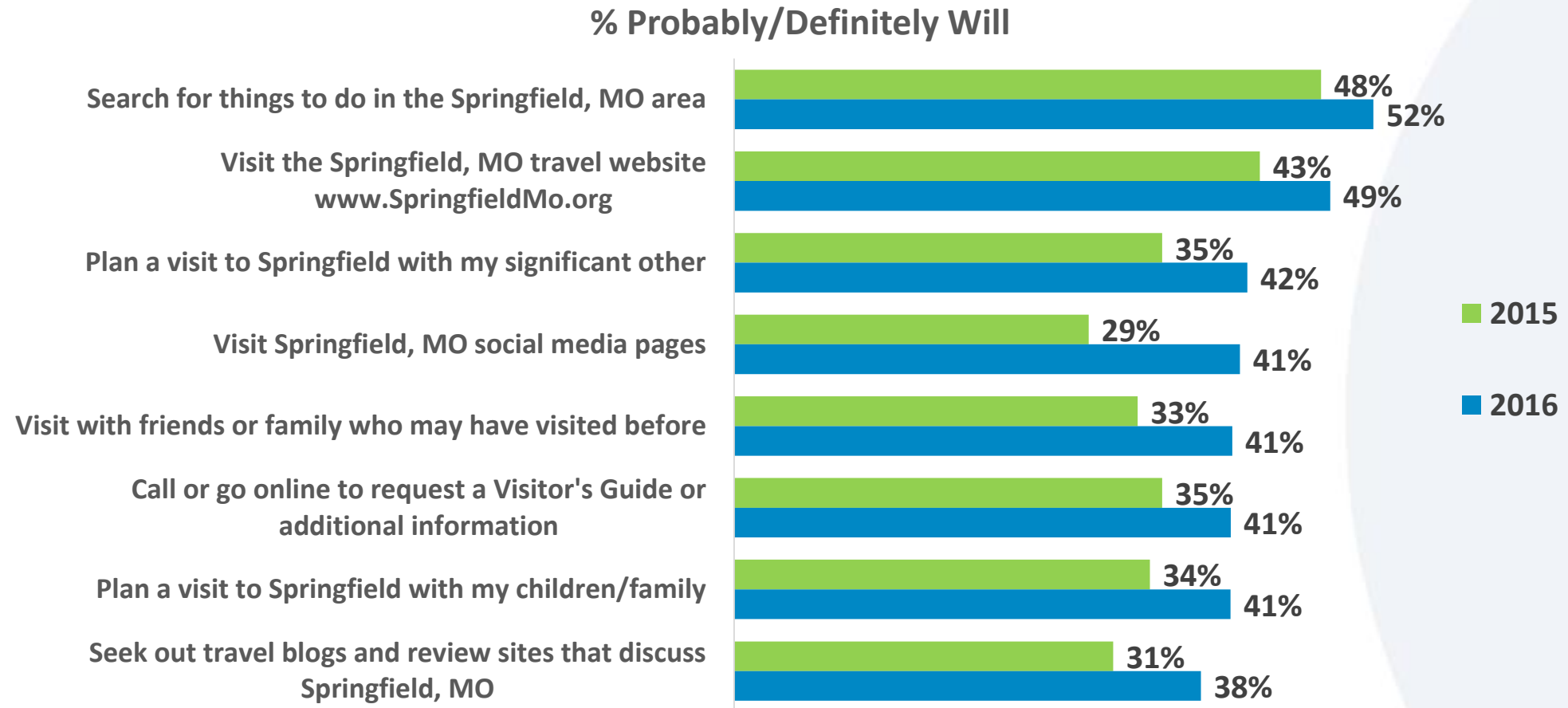
Q32: Using the scale provided, please rate how relevant the points made in these advertisements are to you. Q33: Using the scale provided, please rate how well these ads fit with what you think about Springfield, MO. Q34: Using the scale provided, please indicate how different these ads are from advertising you've seen for other destinations.

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



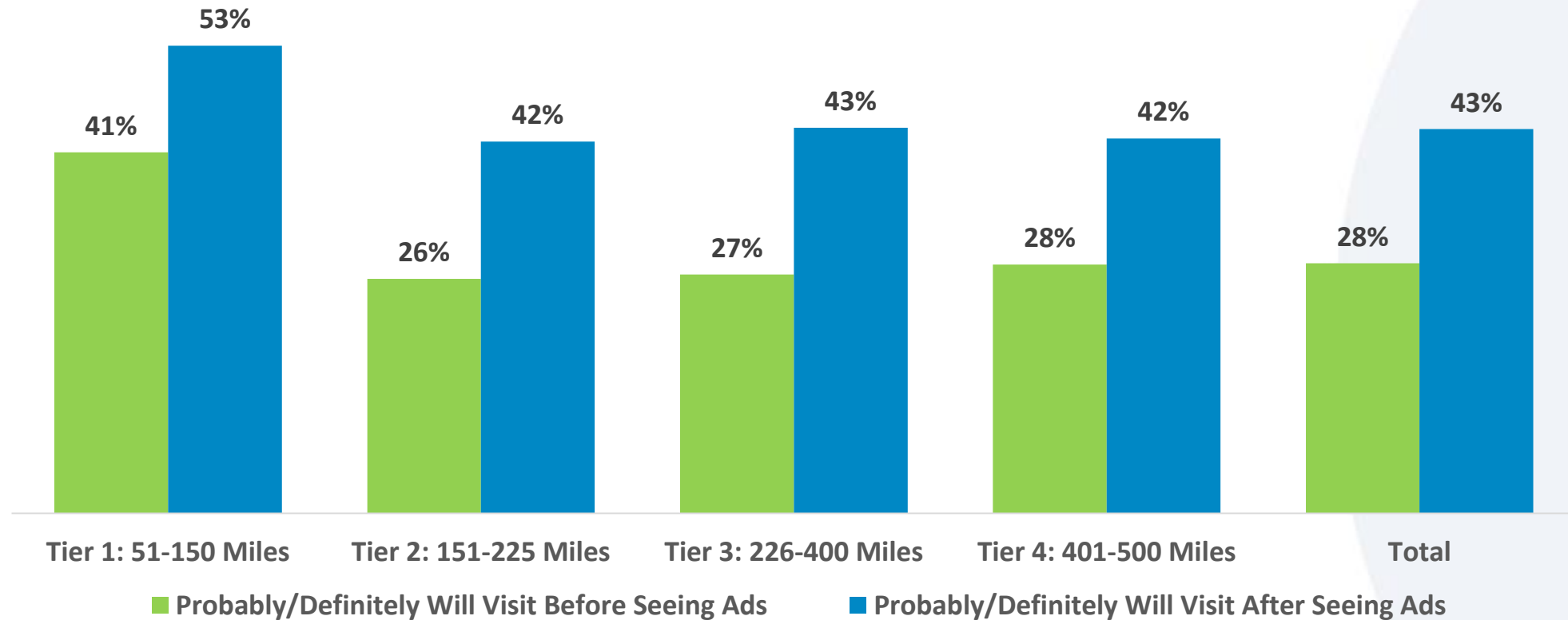
Q35: Which of the following messages, if any, did you take away from the group of advertisements you viewed about the Springfield, MO area?

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



Q6: Using the scale provided, please indicate how likely you are to visit each of the following destinations in the next 12 months.

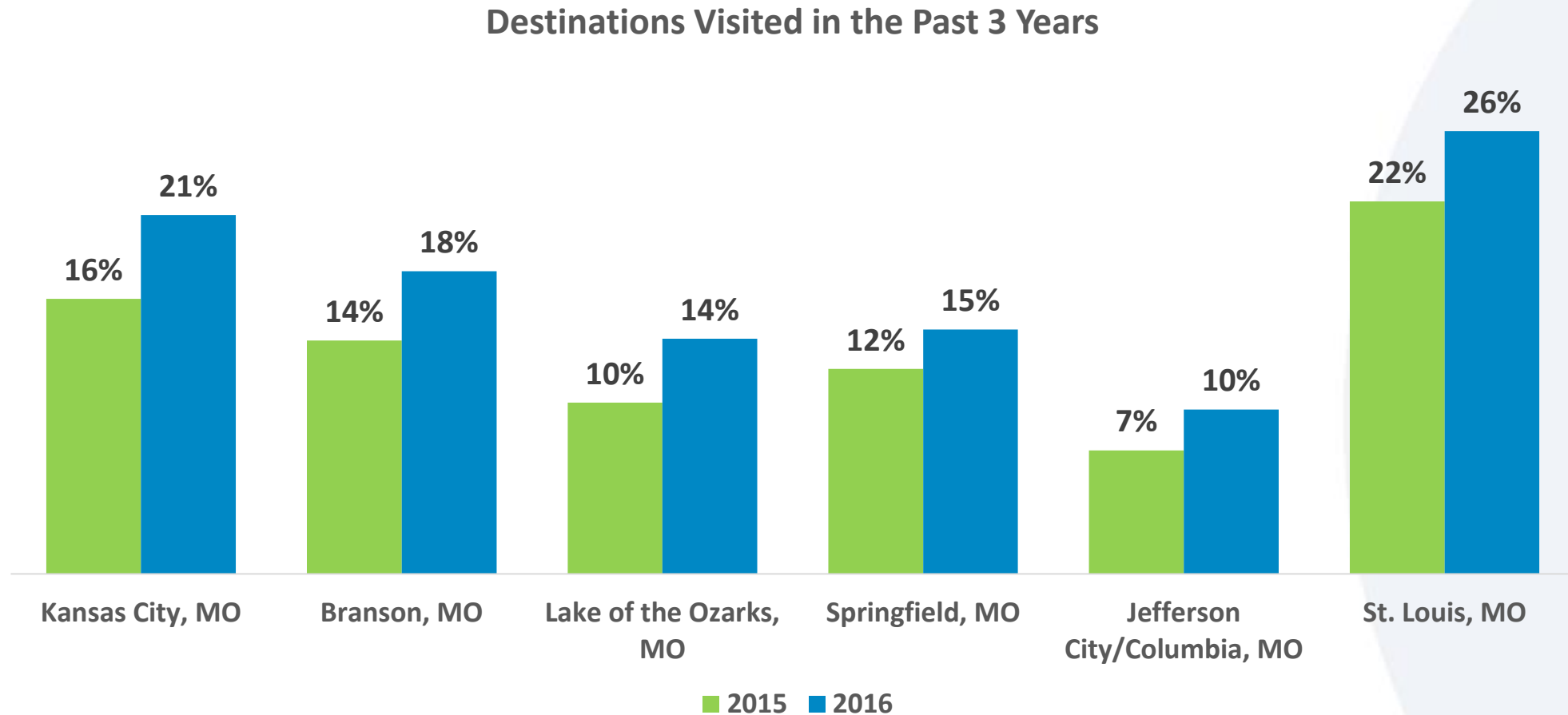
Q37: Using the scale provided, please indicate how likely you are to visit Springfield, MO in the next 12 months.

Springfield Traveler Profile

- + *Top of Mind Destinations*
- + *Past Destination Visitation*
- + *Seasonality and Frequency of Visitation*
- + *Activity Participation and Functional Drivers*
- + *Overnight Visitation*
- + *NPS*
- + *Demographic Categorization*

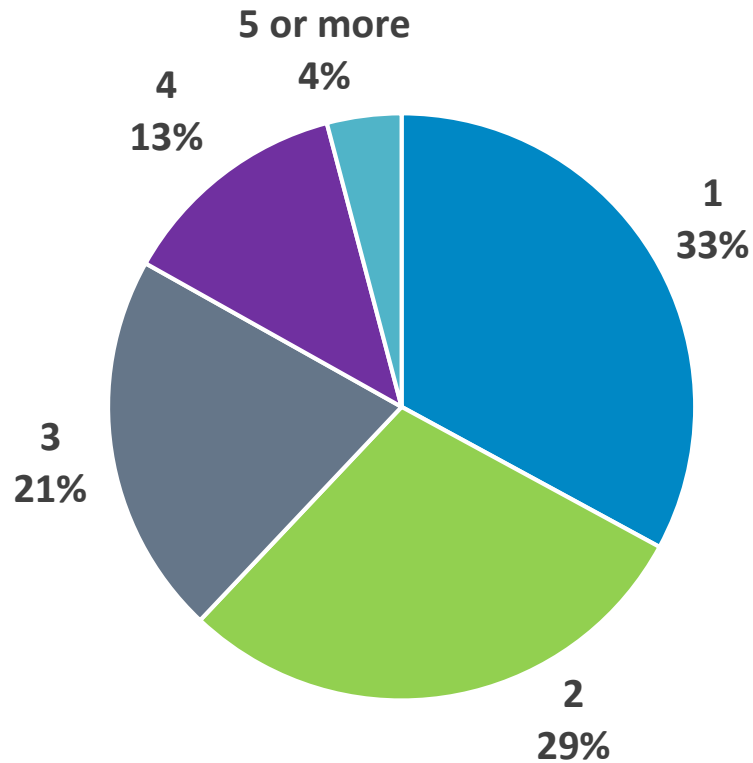
04

Visitation to key destinations across the region was up this year—with Springfield recording a 3% increase.



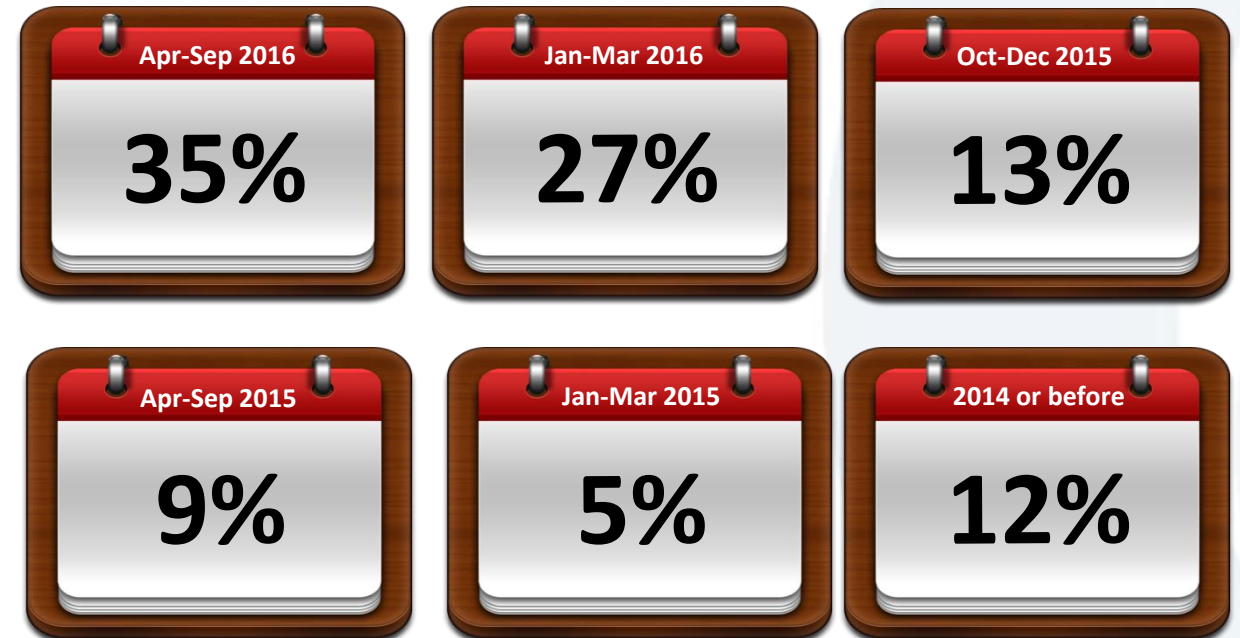
Visitors took approximately 2.3 trips to the area in the past 12 months.

Number of Trips in Past 12 Months – 2.3



RESPONDENT BASE: SPRINGFIELD, MO VISITORS PAST 12 MONTHS | N=227

Most Recent Visit to Springfield, MO

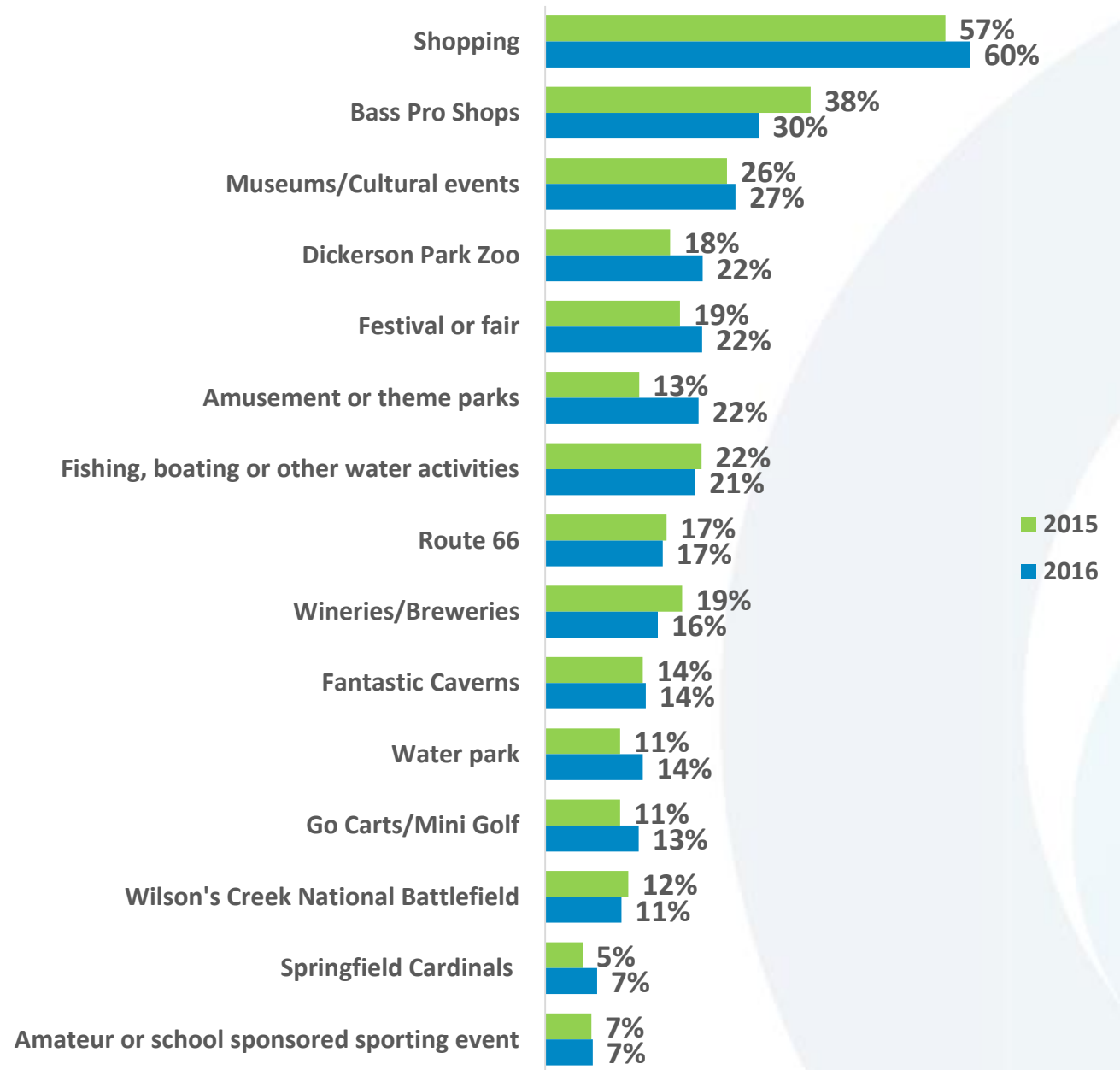


RESPONDENT BASE: SPRINGFIELD, MO VISITORS PAST 3 YEARS | N=302

Area Activity Participation

Shopping and 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

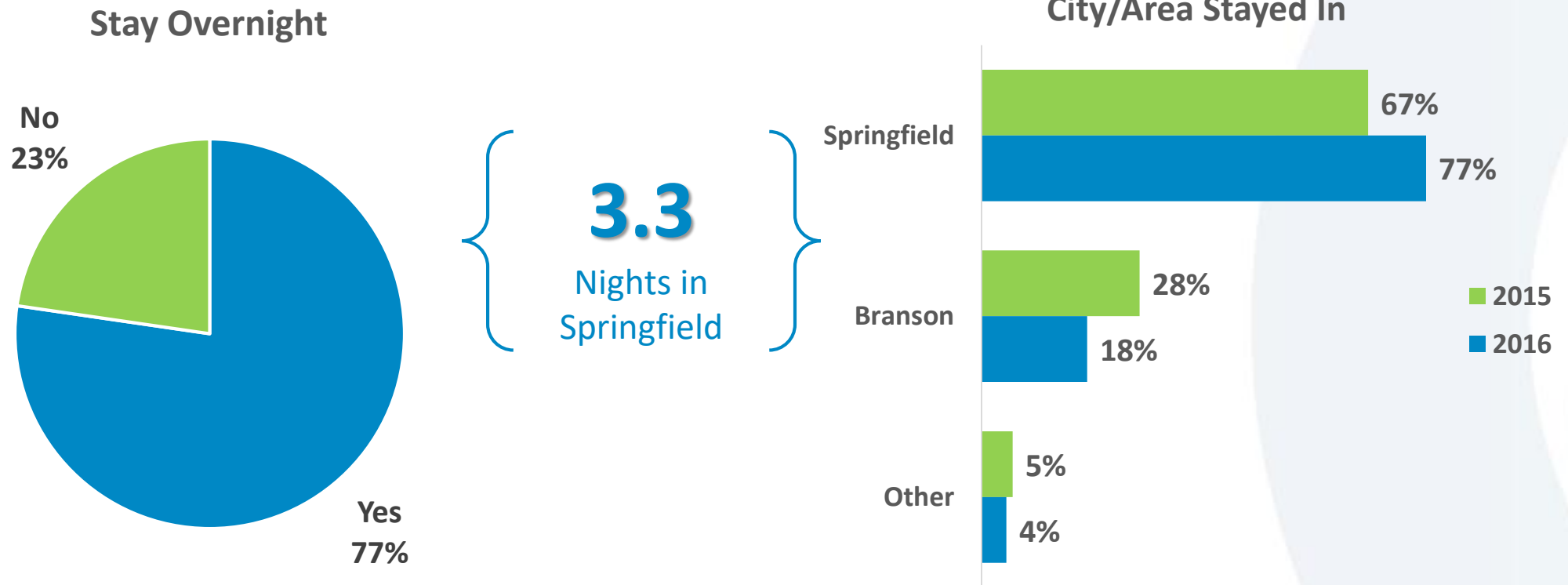
17%



Museums/Cultural Events

17%

Both overnight visitation and length of stay both increased slightly this year.



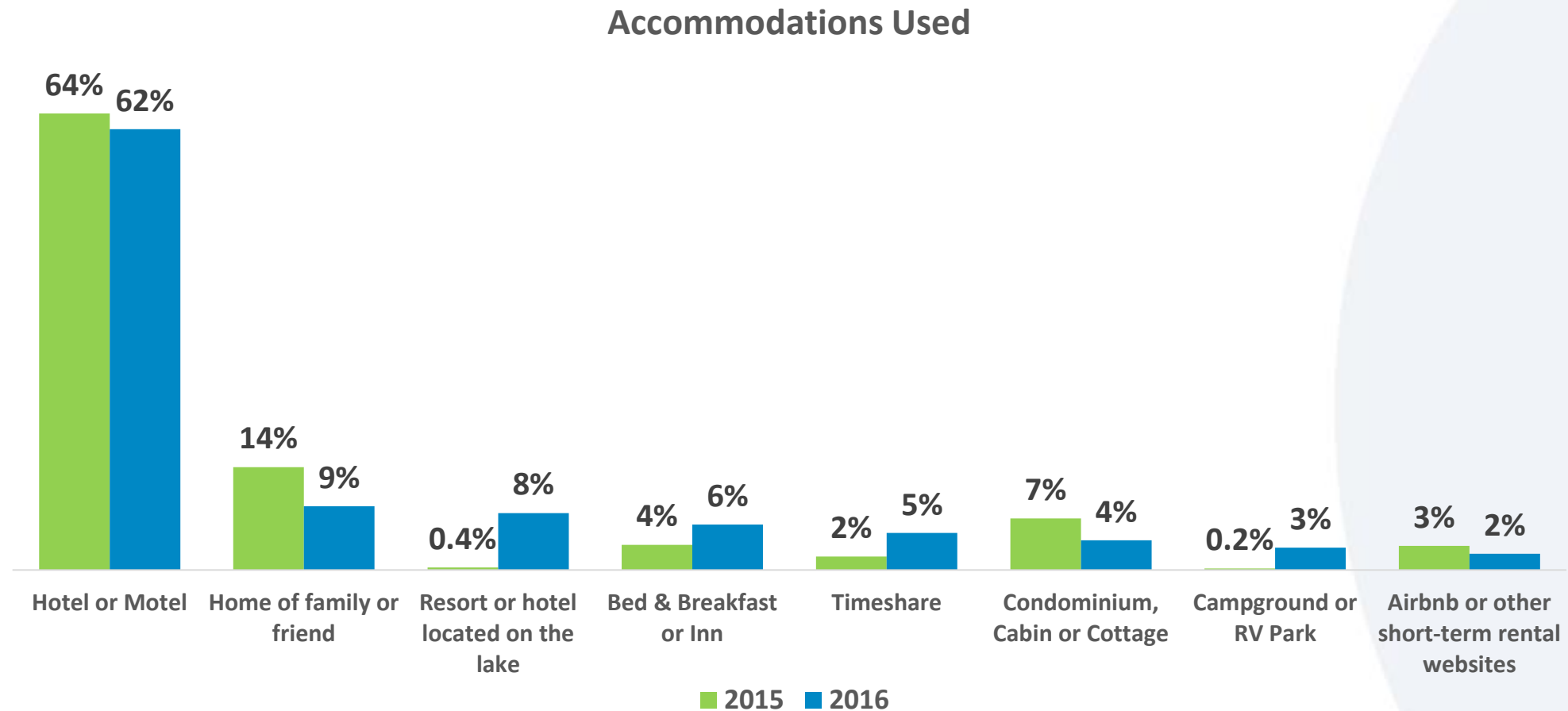
RESPONDENT BASE: SPRINGFIELD VISITORS LAST 3 YEARS | N=302

RESPONDENT BASE: ALL OVERNIGHT VISITORS | N=266

Q13: How many nights did you spend in the area on this trip?

Q14: In 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 chose to stay at a hotel/motel this year. Although, there were increases in the number of Resort, Bed & Breakfast, Campgrounds and Timeshare stays this year.

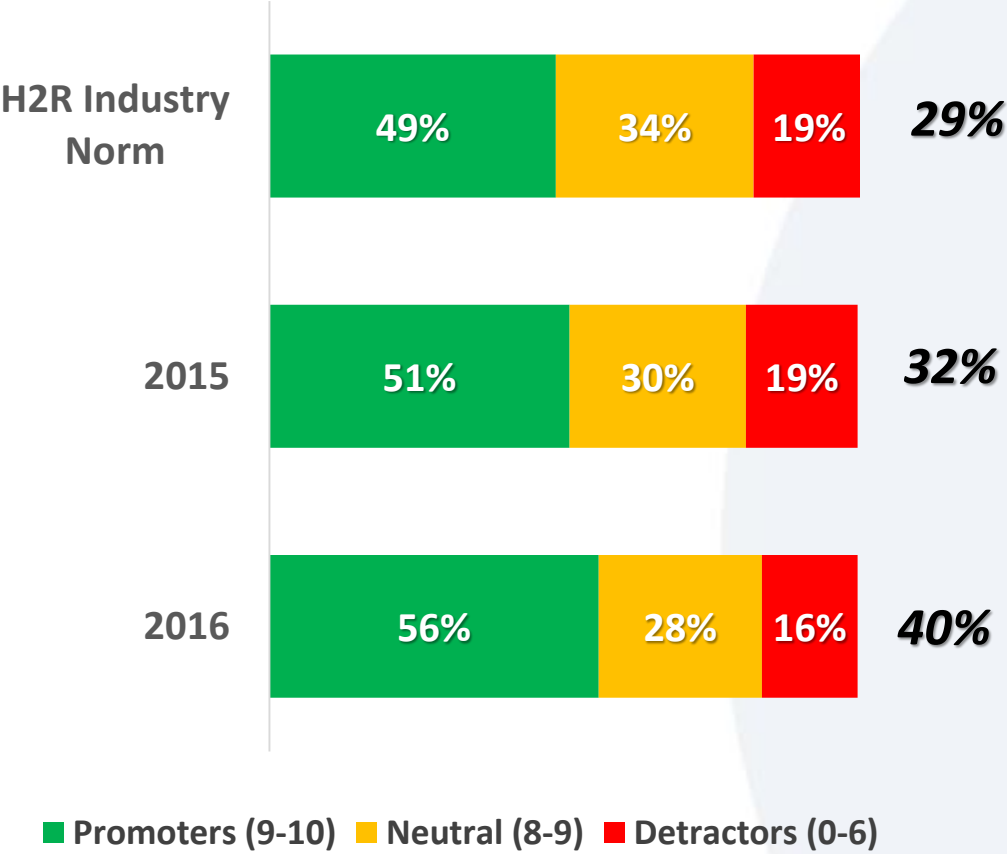


Net Promoter Score

Springfield’s Net Promoter Score among recent visitors increased by 8% to reach 40% in 2016.

This figure was fueled by an increase in the number of brand promoters coupled with a decline in the number of brand detractors.

Not only is this a handsome increase over 2015, but it is also significantly higher than the H2R Industry Norm of 29% for similar destinations. However, Branson received an NPS most recently measured at 64%.



Demographic Profile of Springfield Visitors

	Visitors in Past 12 Months	Non-Visitors	Prospects*	Brand Advocates**
Respondent Age	40	42	37	39
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.

Families vs. Adults

	Families (Children in the Home)	Adults (No Children in the Home)	Variance
Respondent Age	36	48	-12
Children in the Home	100%	0%	+100%
No Children	0%	100%	-100%
Males	37%	36%	+1%
Females	63%	64%	-1%
Caucasian or White	84%	86%	-2%
African American or Black	7%	6%	+1%
Other Ethnicity	9%	8%	+1%
HH Income	\$74.8k	\$67.6k	+\$7.2k
Distance	295 miles	291 miles	+4 miles
% College Graduate +	52%	46%	+6%

Thank You!



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H2R MARKET RESEARCH

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