

# H2R Market Research

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*Reveal Your Customer's Full Experience*

## **Springfield, MO CVB 2017 Marketing & Media Effectiveness Research**

*Delivered December 2017*

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# Project Overview

## **PURPOSE**

The purpose of this study is to measure the impact Springfield Convention & Visitors Bureau's 2017 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 2016 campaign for context where applicable, as well as the H2R Proprietary Industry Norm.

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## **TARGET AUDIENCE**

The Springfield 2017 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 50-500 mile radius of Springfield. The research was conducted in October of 2017 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.

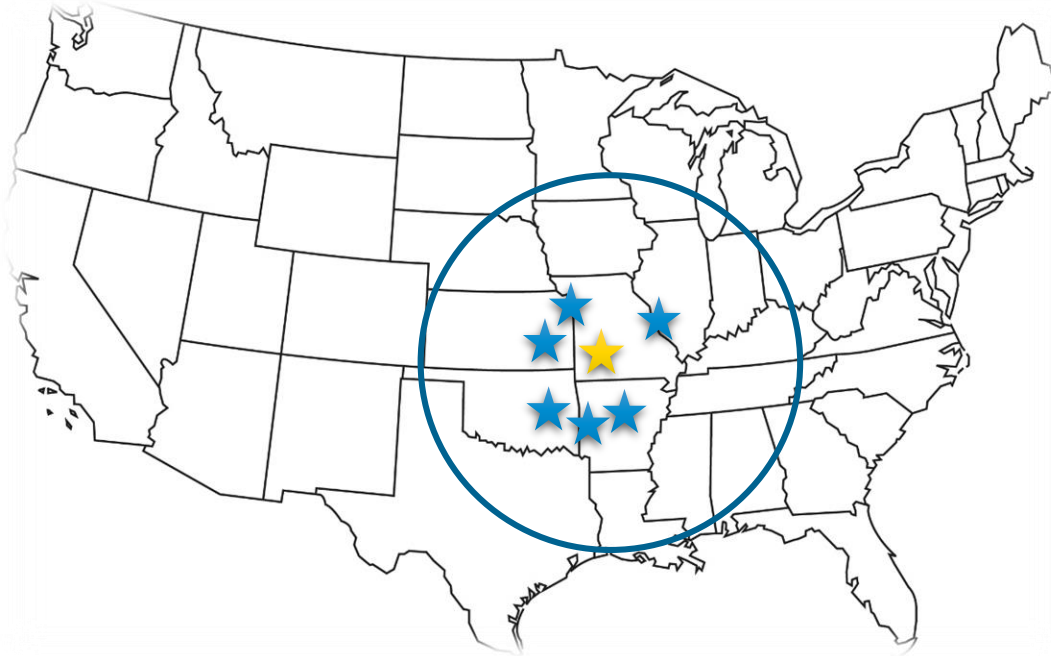
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## **SAMPLE**

A total of 1,910 travelers were interviewed for the Marketing & Media Effectiveness portion of the study. This sample size provides for a maximum margin of error of +/-2.1% at a 95% confidence interval overall. A total of 93 Springfield residents were interviewed for the Resident Sentiment portion of this study, providing a maximum margin of error of +/-10.2%.

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# Advertised Markets



- The sample for the 2017 Marketing & Media Effectiveness study was taken across the Springfield CVB's advertised market area which encompasses a radius of 500 miles and included 6 Spot Markets (Kansas City, St. Louis, Tulsa, Wichita, Fort Smith and Little Rock) all commensurate with how the marketing was placed. To represent travelers from each of these areas fairly and appropriately, the results in this study were also weighted by market tier as in the past. 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 receive a heavier weight than markets with smaller populations.

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# Executive Summary

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# Marketing Efficiency

- Overall ad awareness of the Springfield Convention & Visitors Bureau's (SCVB) 2017 campaign reached 46% of travelers equating to approximately 9.9M aware traveler households across the region.
- With a media investment of approximately \$1.1M this year, SCVB's cost per aware household averaged just \$0.11. While efficiency and awareness metrics declined slightly this year, they remained well above the H2R Proprietary Industry Norm (H2R Norm). The H2R Norm for marketing campaign awareness stands at 39% with an average market reach of 7.9M households and a cost per aware travel household at \$0.46. The Springfield CVB's 2017 campaign eclipsed each of these thresholds.
- A marketing campaign is considered successful when travelers who were reached by the destination's ads exhibited a higher level of visitation than those who did not see or hear any of the DMO's ads. Efficiently reaching new travelers is important to any destination.





## SCVB Delivered Larger Impact in 2017

- Each year the nationwide travel marketplace continues to evolve making reaching and influencing travelers somewhat of a moving target.
- The Springfield CVB has done a good job of meeting this challenge head-on. This year's campaign produced solid year-over-year gains in both incremental visitation and travel spending.
- Incremental travel spending generated as a result of SCVB's marketing communications campaign reached more than \$88 million this year—marking a \$15 million increase over 2016. Equally impressive was the fact that this \$15 million improvement over last year was generated on an additional gross investment of only \$226k – providing a nice return on the incremental investment.
- Overall, the campaign generated an ROI of \$83, on par with the H2R Norm for DMOs with similarly sized budgets.



# Advertising Evaluation

- More than three-fourths of travelers indicated SCVB's marketing messages made the Springfield area seem more appealing as a destination, a 6 point increase over 2016. Likewise, the campaign's relevance (+3%), increased over last year while brand fit (-18%) and differentiation from other destination ads (-4%) experienced declines relative to last year.
- The marketing messages that resonated best with travelers were variety of things to see and do (+1%) and being surrounded by natural scenic beauty (+11%). Message takeaways showing Springfield as a fun and exciting family destination (+8%), having arts/cultural/nightlife activities to enjoy (+20%) and a variety of charming local restaurants (+12%) all posted significant increases over 2016.
- Perhaps most importantly, the campaign increased travelers' post-exposure intent to visit Springfield by 11 points—on par with H2R's Norm of 7%.





# Halo Effect

- Applying the psychological “halo effect” principle to Springfield’s advertising campaign allows one to determine the degree to which the CVB’s travel advertising impacts the perception of the area as a place to live, work and retire among other things.
- This year’s study revealed that SCVB’s marketing has a significant impact on the perception of Springfield. Compared to the baseline of non-visitors who had not previously seen a travel ad for Springfield this year, those non-visitors who were “advertising aware” were significantly more likely to view Springfield as a good place to attend college (Index 335), purchase a vacation home (335), to retire (298), to live (293), to start a business (287), or to start a career (276). Furthermore, visitation to Springfield had an even greater impact on each of these metrics.
- The combination of both visiting Springfield and seeing ads for the destination had an impact of 6-7 times the levels of agreement over the baseline. This indicates that tourism marketing has an impact that extends well beyond the tourism economy.



# Springfield Visitors

- Springfield's unaided top of mind awareness continues to increase among the target market. This year Springfield ranked in the top 20 (at #17) regional destinations travelers stated they enjoy visiting for leisure. This is a significant increase over the past few years when Springfield ranked 58<sup>th</sup> in 2015 and 31<sup>st</sup> in 2016.
- Springfield's most popular time for visitation continues to be in the peak season (April-September timeframe) —39% of past visitors (in the past three years) reported visiting during this time of year.
- The top activities Springfield's visitors indicated visiting or participating in this year were Shopping (56%) and Bass Pro Shops (36%). Interestingly, among all past visitors only 3% indicated they were aware of a new attraction opening in the area. When specifically prompted about Wonders of Wildlife, that ratio rose to 11%. And, among the most recent visitors in 2017, aided awareness rose to 33%.





## Springfield Residents

- Compared to recent visitors, residents of Springfield have similar levels of satisfaction with the area as a travel destination. Residents are most satisfied with the charming local restaurants (83%), easy wayfinding (79%) and the hospitality/friendliness of the people (76%). Residents are more satisfied with about half of the area attributes while visitors with the other half. Specifically, recent visitors are significantly more satisfied with the safety and security of the area (78%) than area residents (61%).
- Residents are more likely to agree that Springfield is a good place to attend college (+22%), to live (+10%), to retire (+16%), to start a career (+3%) or to start a business (+8%). And, not surprisingly, residents are much less likely to think the area is a good place to purchase a vacation home (-15%).
- Finally, residents gave Springfield a Net Promoter Score for recommending Springfield as a travel destination identical to that of recent visitors (13%).



# Springfield, MO 2017 Marketing & Media Effectiveness

## Key Performance Indicators for Total Media Spend

The Springfield Convention & Visitors Bureau generated awareness from 46% of the travel households in their target markets.

This equates to 9.9M households across the region. Additionally, this campaign was responsible for impacting 128k trips to the Springfield area and for influencing more than \$88M in spending. Given an investment of more than \$1 Million, this means the CVB influenced a return of \$83 for every dollar invested in marketing.

Key Performance Indicators	2016	2017	H2R Proprietary Industry Norm*
Aided Ad Awareness	52.0%	45.9%	39.4%
Aware Traveler Households	11.1M	9.9M	7.9M
Impacted Travel	+1.1%	+1.3%	+3.5%
Impacted Trips	123k	128k	242k
Impacted Travel Revenue	\$73.6M	\$88.3M	\$91.8M
Media Investment	\$844k	\$1.07M	\$1.95M
Cost/Aware Household	\$0.08	\$0.11	\$0.46
Return on Investment	\$87	\$83	\$83

\*The H2R Proprietary Industry Norm is calculated using metrics from destinations whose advertising budgets are similar to Springfield CVB.

# Springfield, MO 2017 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 increased to \$99 in 2017.

The overall awareness and reach of the campaign was slightly less this year. However, the incremental impact was higher. The campaign influenced more trips and more spending in the Springfield area this year, providing for a much higher return on investment.

Key Performance Indicators	2016	2017
Aided Ad Awareness	52.0%	45.9%
Aware Traveler Households	11.1M	9.9M
Impacted Travel	+1.1%	+1.3%
Impacted Trips	123k	128k
Impacted Travel Revenue	\$73.6M	\$88.3M
Media Investment	\$816k	\$893k
Cost/Aware Household	\$0.07	\$0.09
Return on Investment	\$90	\$99

# Marketing Efficiency

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01



## MARKETING EFFICIENCY KPIs



**46%** of travelers saw or heard a SCVB advertisement



The 2017 Campaign reached **9.9M** households

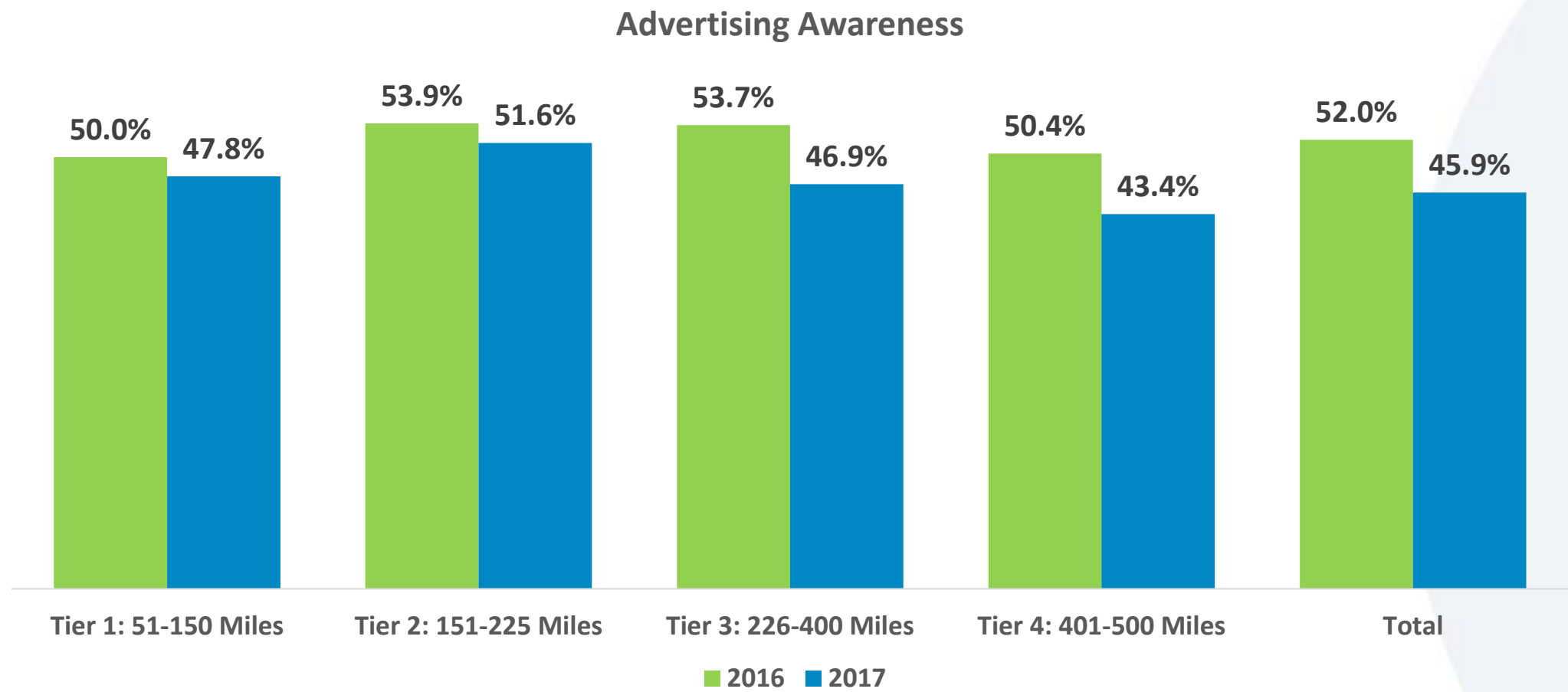


The total cost per aware household averaged **\$0.11**



SCVB invested **\$1.1M** in advertising for the 2017 Campaign

Advertising awareness remains higher than the H2R Norm (39%) despite declining slightly from last year\*.



*\*Springfield has a lot of company. H2R has recorded ad awareness declines from coast to coast this year. The average DMO has experienced a 7% decline so far this year.*

## Market Reach (Aware Traveler Households)

Market reach totaled nearly 10M travel households this year, an 11% decline from the 2016 reach.

Once again, those living in Tier 2 had the highest percentage of travelers aware of Springfield's ads. However, tiers farther from Springfield having higher populations represent higher levels of market reach—or aware traveler households.

Market	2016 Market Reach	2017 Market Reach
Tier 1: 51-150 miles	0.6M	0.6M
Tier 2: 151-225 miles	1.3M	1.2M
Tier 3: 226-400 miles	4.3M	4.0M
Tier 4: 401-500 miles	4.9M	4.1M
<b>Total Market</b>	<b>11.1M</b>	<b>9.9M</b>

# Media Investment & Efficiency

The Springfield CVB's total advertising investment—including and beyond the MDT matching dollars—increased by 27% in 2017. The campaign continued to be extremely efficient even with the slightly higher cost per aware household.

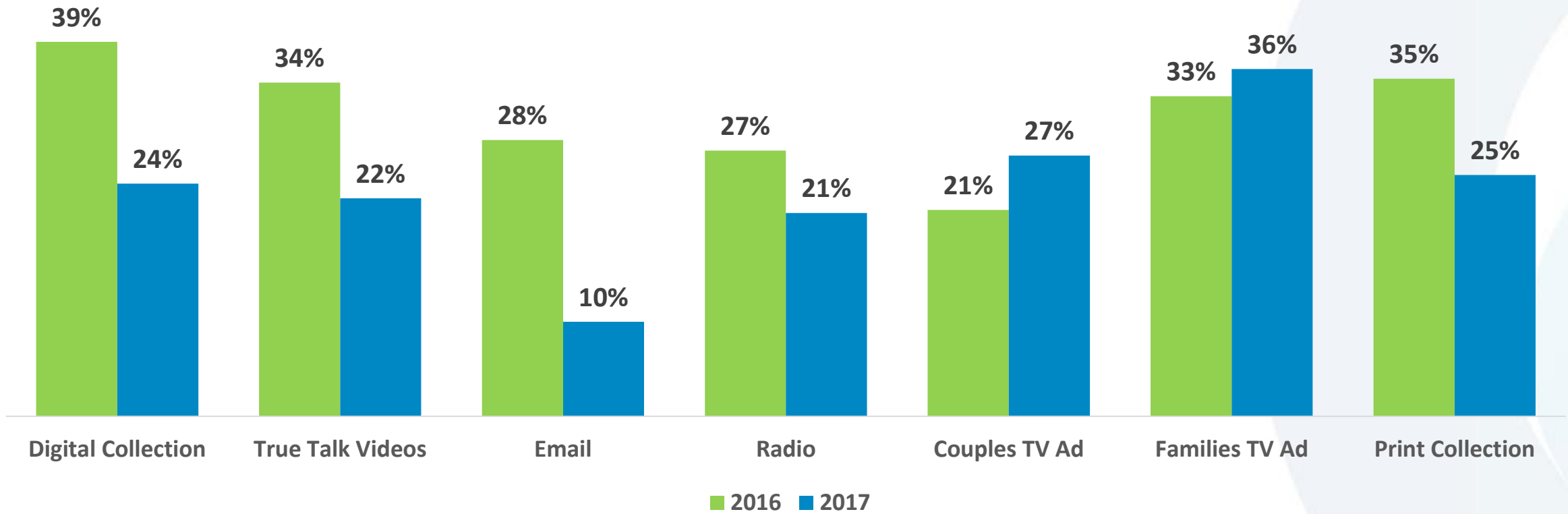
The increase in advertising investment was to be expected as new television markets were added in 2017 – including Wichita, Little Rock and Fort Smith. Spread across the tiers in Springfield's target trade area, 2017 saw increases in each tier except Tier 2. Therefore, it is not surprising that each of these tiers saw a slight increase in cost per aware household while tier 2 saw a decline.

Media Investments	2016 Investment	2017 Investment
Tier 1: 51-150 miles	\$41,114	\$72,723
Tier 2: 151-225 miles	\$230,378	\$127,984
Tier 3: 226-400 miles	\$270,351	\$460,155
Tier 4: 401-500 miles	\$301,946	\$409,067
<b>Total Market</b>	<b>\$843,789</b>	<b>\$1,069,929</b>

Marketing Efficiency	2016 Cost/HH	2017 Cost/HH
Tier 1: 51-150 miles	\$0.07	\$0.11
Tier 2: 151-225 miles	\$0.18	\$0.11
Tier 3: 226-400 miles	\$0.06	\$0.12
Tier 4: 401-500 miles	\$0.06	\$0.10
<b>Total Market</b>	<b>\$0.08</b>	<b>\$0.11</b>

# Television advertising was the only medium to see increases in awareness over 2016 levels.

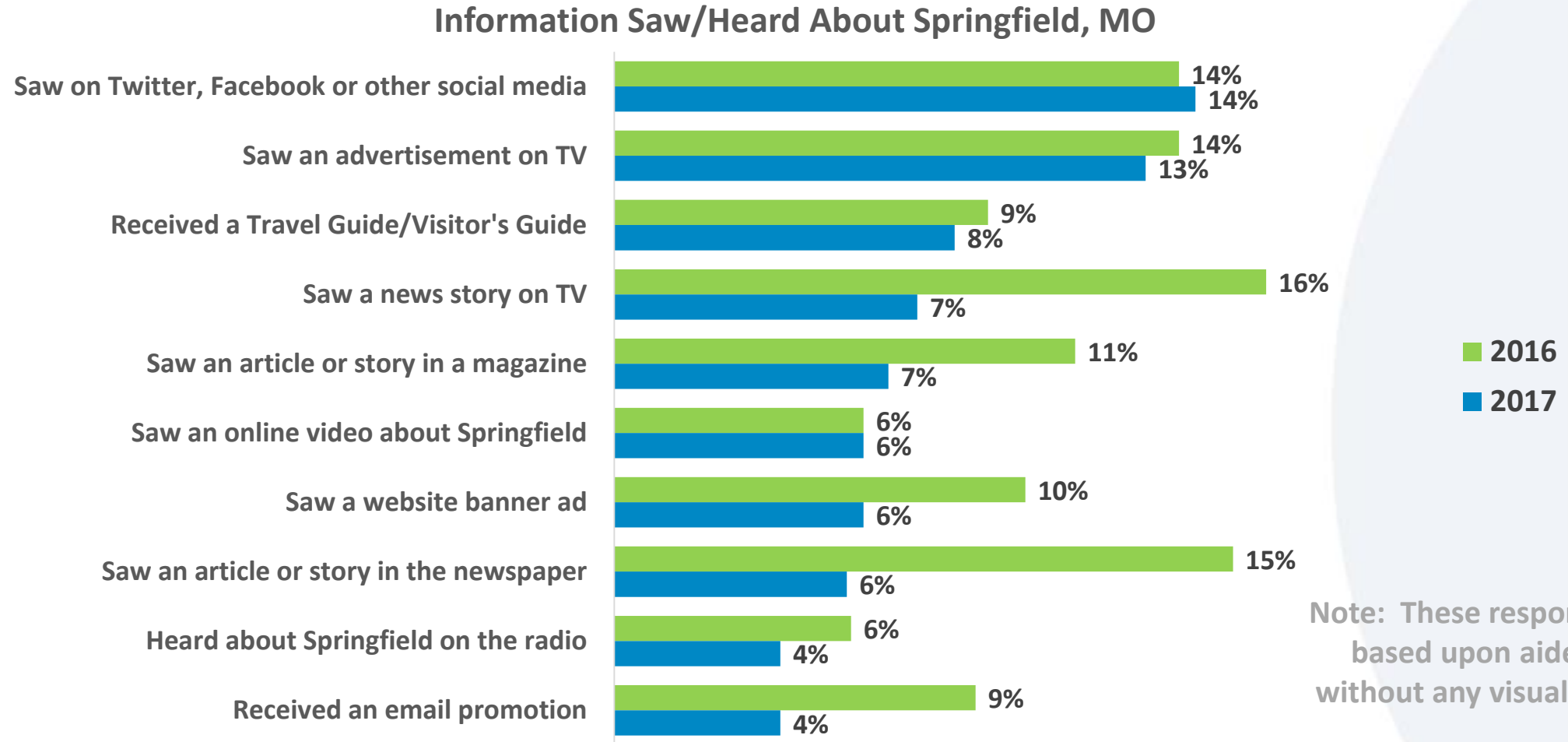
Advertising Awareness by Medium



Q31-37: Have you seen this advertisement or one similar?

*\*Springfield has a lot of company. H2R has recorded ad awareness declines from coast to coast this year. The average DMO has experienced a 7% decline so far this year.*

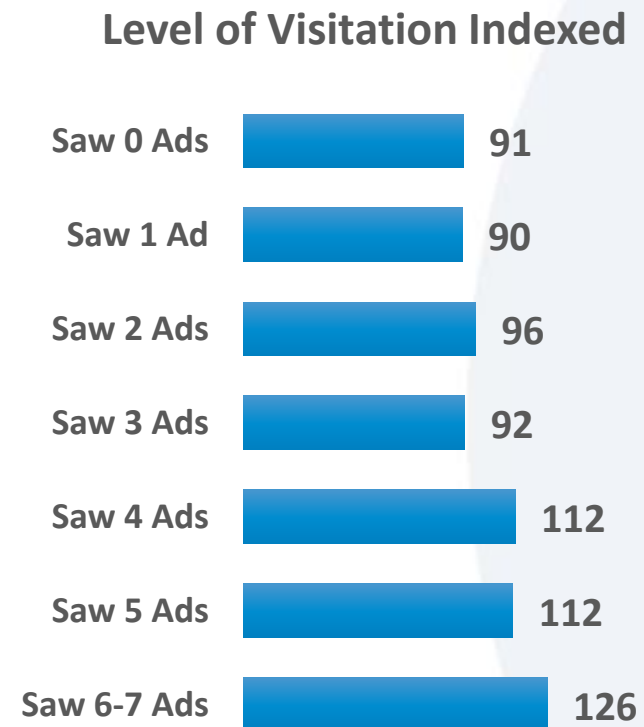
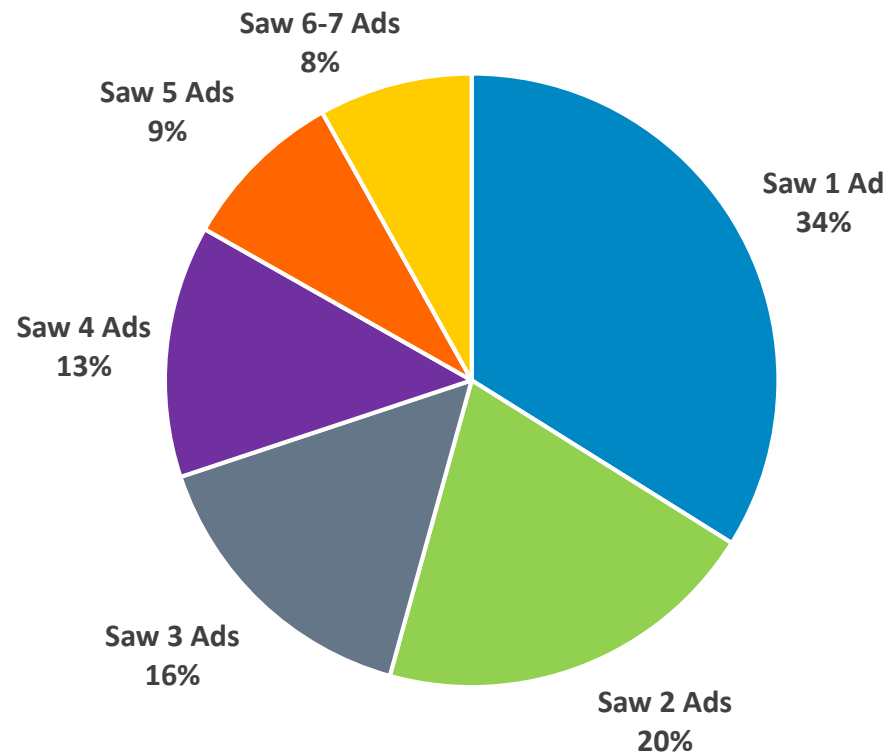
# Assisted recall of social media, television ads, travel guides and news stories ranked the highest for Springfield this year.



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



Higher ad exposure once again delivered increased visitation. The more SCVB ad exposures travelers recalled (over 3), the more likely they were to have visited Springfield in 2017.



# Advertising Impact

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02

## ADVERTISING IMPACT KPIS



SCVB'S 2017 campaign  
impacted **128k** trips



**\$88.3 million** was generated  
from those trips



Campaign impacted **248k**  
Springfield hotel room nights



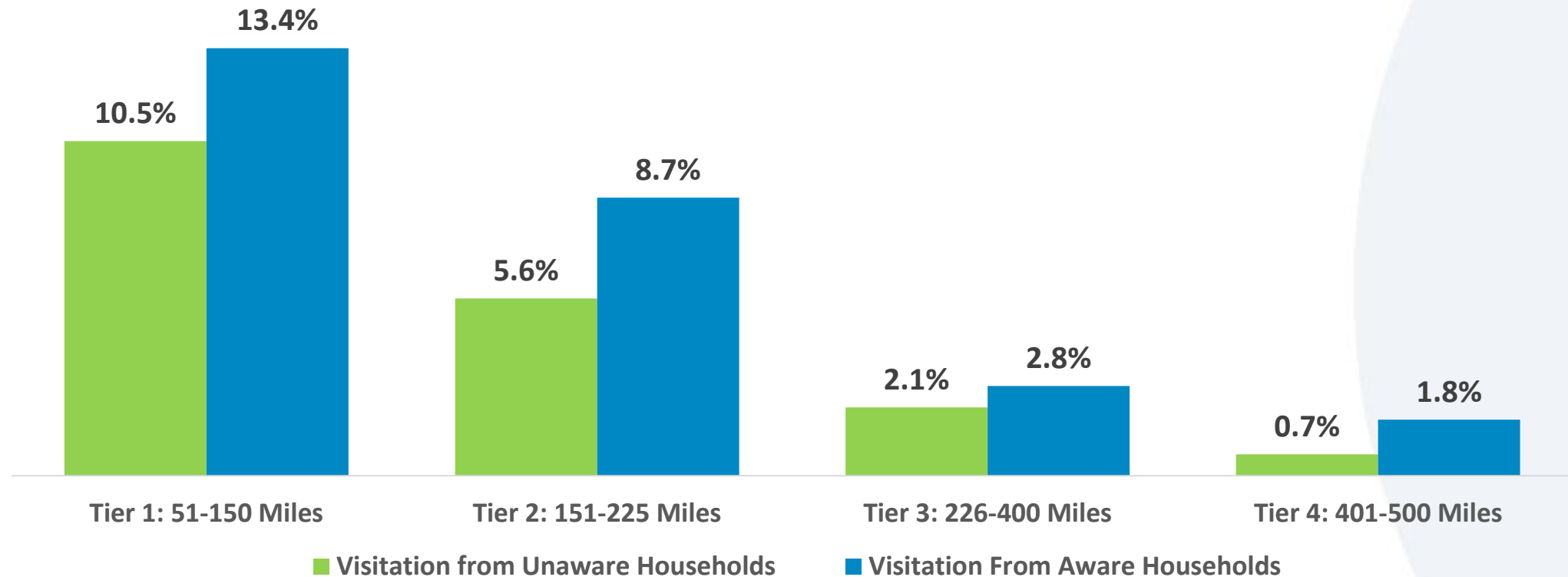
SCVB invested **\$1.1M** in  
marketing media



**ROI was \$83**

Every market tier was positively impacted this year. That is, 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 2017 marketing campaign impacted 128k 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.

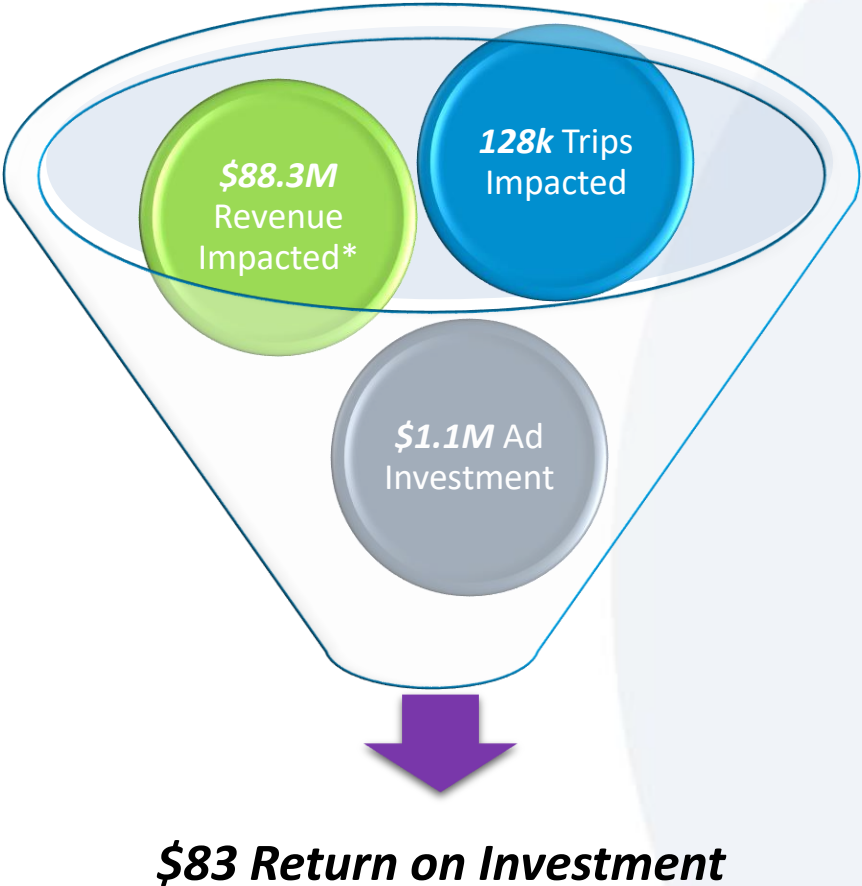
Market	2016 Impact	2017 Impact
Tier 1: 51-150 miles	0.4%	2.9%
Tier 2: 151-225 miles	0.6%	3.2%
Tier 3: 226-400 miles	1.1%	0.7%
Tier 4: 401-500 miles	1.4%	1.1%
<b>Total Market</b>	<b>1.1%</b>	<b>1.3%</b>

Market	2016 Impacted Trips	2017 Impacted Trips
Tier 1: 51-150 miles	2.3k	18.6k
Tier 2: 151-225 miles	8.0k	38.3k
Tier 3: 226-400 miles	46.8k	26.7k
Tier 4: 401-500 miles	65.9k	44.4k
<b>Total Market</b>	<b>123.0k</b>	<b>127.8k</b>

# SCVB's 2017 Campaign generated an ROI of \$83 for every dollar invested.



**Aware Party  
Trip Spending**  
\$691  
2016: \$598  
2015: \$533



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



# Impacted Spending & ROI

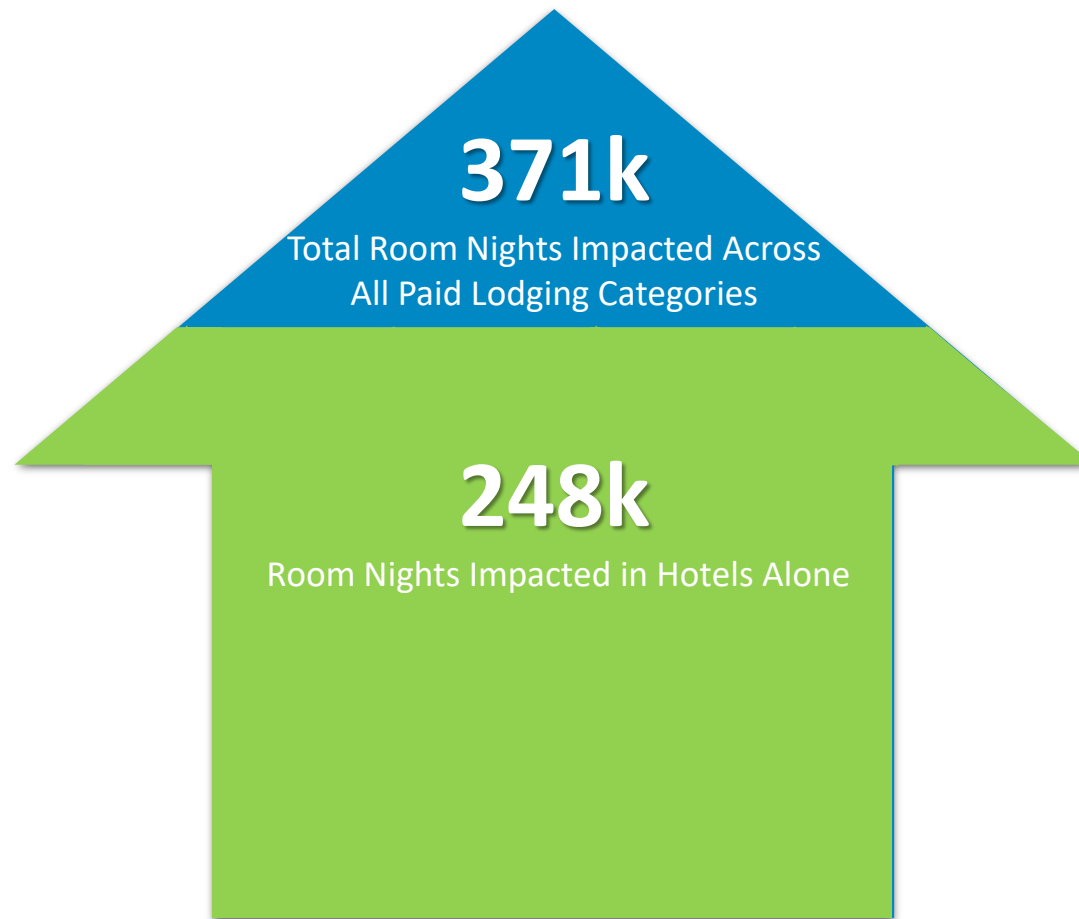
The 2017 campaign impacted spending in the Springfield area of more than \$88M—a record for Springfield. This, in turn, influenced an ROI of \$83. While this year’s ROI was slightly lower than 2016’s, media investments increased so this was not unexpected.

Springfield visitors reported spending an average of \$691 per party on their most recent visit—nearly \$100 more than last year. This fueled the large impact on spending in the area. Those visiting from Tier 4 had the largest impact on the tourism economy in Springfield.

Market	2016 Impacted Spending	2017 Impacted Spending
Tier 1: 51-150 miles	\$1.1M	\$7.8M
Tier 2: 151-225 miles	\$4.1M	\$20.1M
Tier 3: 226-400 miles	\$28.8M	\$17.5M
Tier 4: 401-500 miles	\$39.6M	\$42.9M
<b>Total Market</b>	<b>\$73.6M</b>	<b>\$88.3M</b>

Market	2016 ROI	2017 ROI
Tier 1: 51-150 miles	\$26	\$107
Tier 2: 151-225 miles	\$18	\$157
Tier 3: 226-400 miles	\$106	\$38
Tier 4: 401-500 miles	\$131	\$105
<b>Total Market</b>	<b>\$87</b>	<b>\$83</b>

# Springfield Room Nights/Units Impacted



*The SCVB Campaign influenced more than 477k room nights across lodging categories for the entire region with more than 319k of those being in hotels. More than 77% of those occurred in the city of Springfield, reflected in the graphic above.*

The 2017 Campaign impacted more than 371k *total room nights/units* among those who stayed overnight in paid accommodations in Springfield, MO. (Hotel room nights accounted for 248k of this number.)

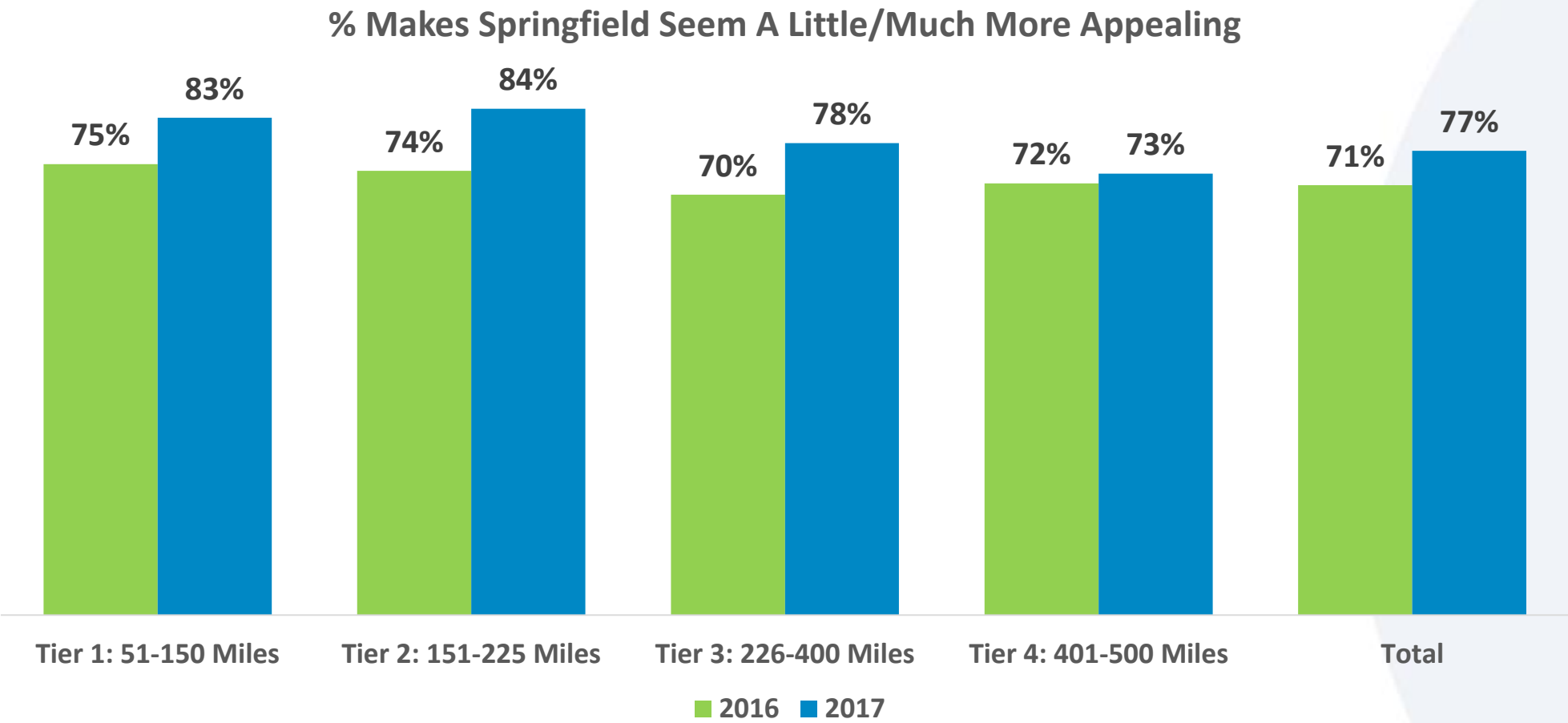
Extrapolated across the number of rooms purchased, length of stay and those spending the night in Springfield, it is estimated that the 2017 Campaign influenced approximately 19% of the total commercial room nights/units purchased by Springfield area visitors.

# Marketing Evaluation

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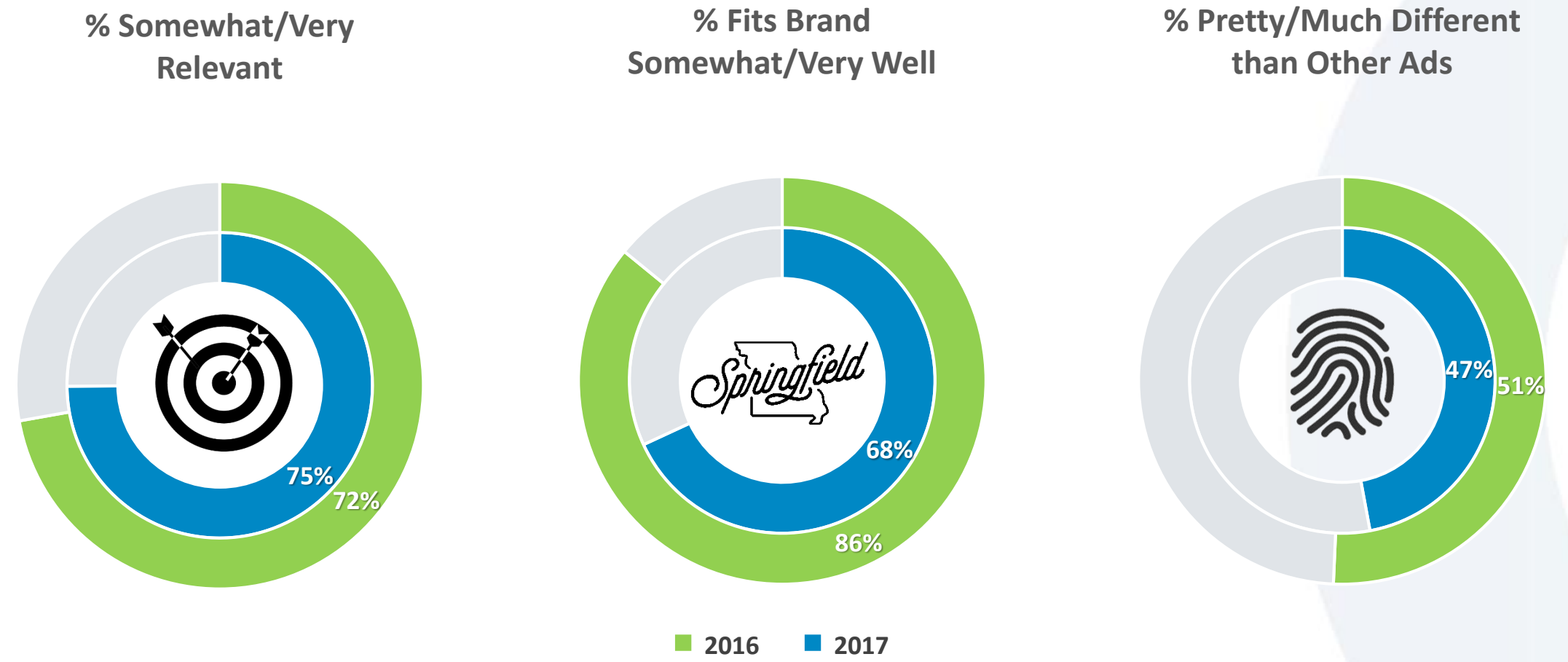
03

More than 77% of travelers indicated the ads in SCVB’s marketing campaign made Springfield seem more appealing to them—a 6 point increase over 2016 levels.

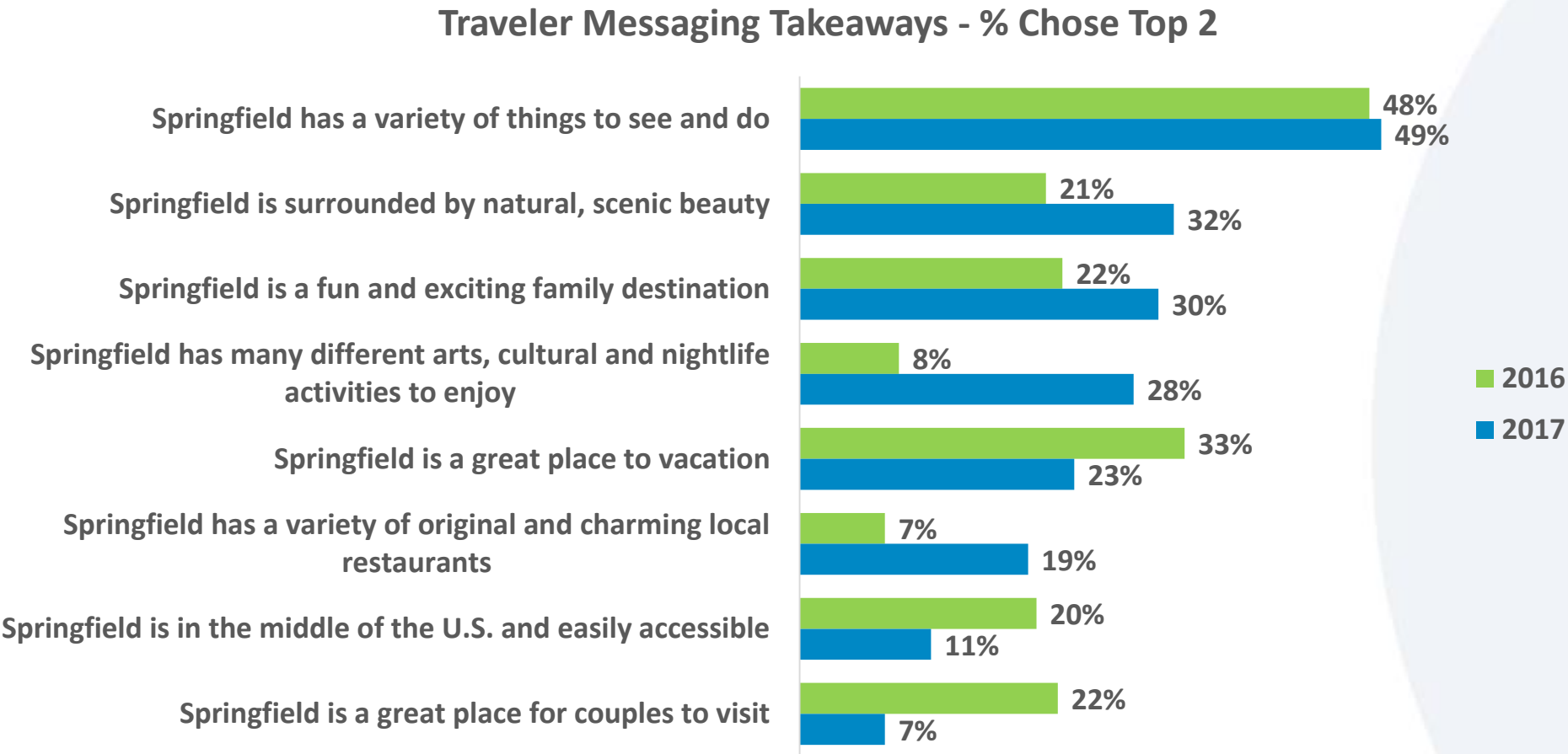


Q37: Using the scale provided, please indicate the degree to which these ads make Springfield, MO seem more appealing to you.

# The relevance of Springfield's ads increased this year, while brand fit and differentiation scores slipped compared to 2016.

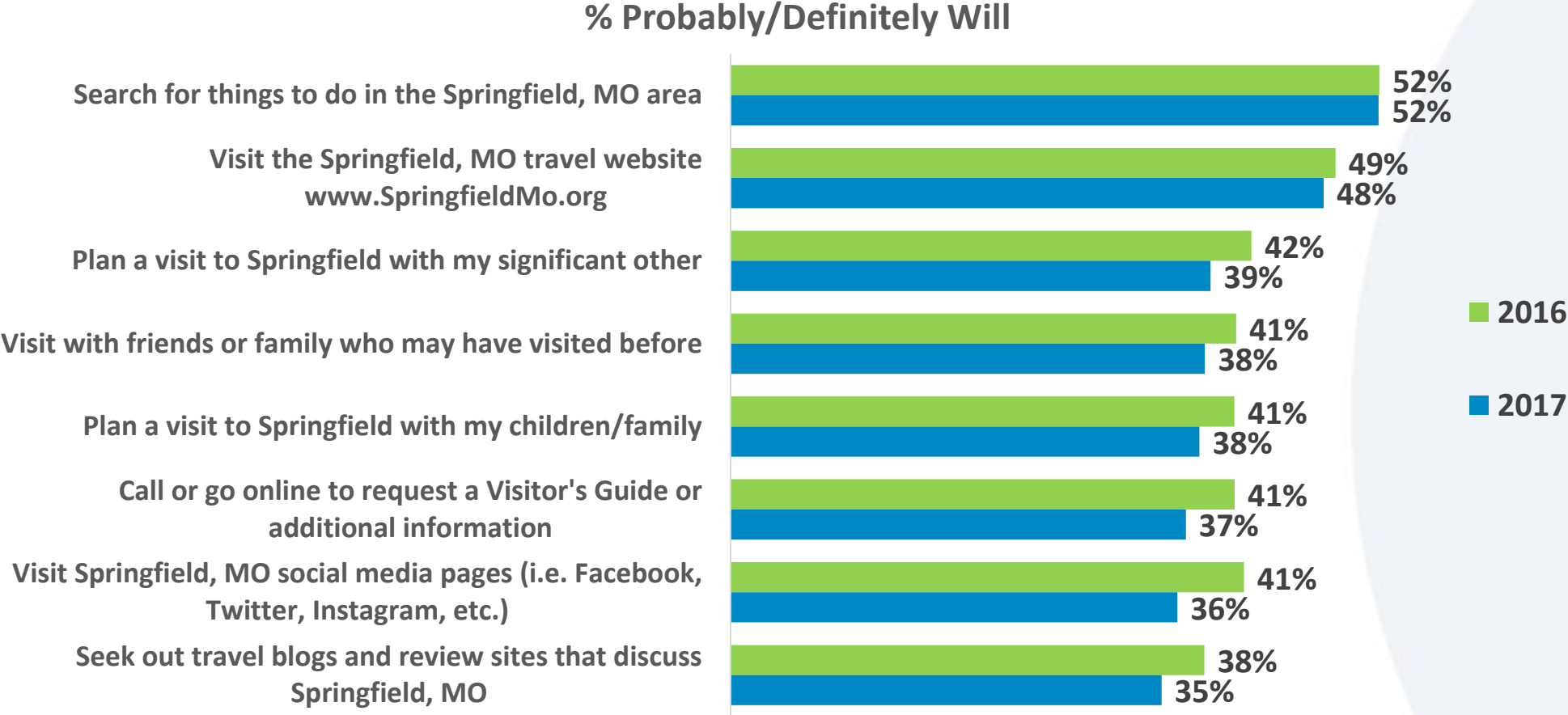


Variety remains the biggest message takeaway; however, many other attributes saw significant increases this year, pushing accessibility and couples’ destination to the bottom of the list.



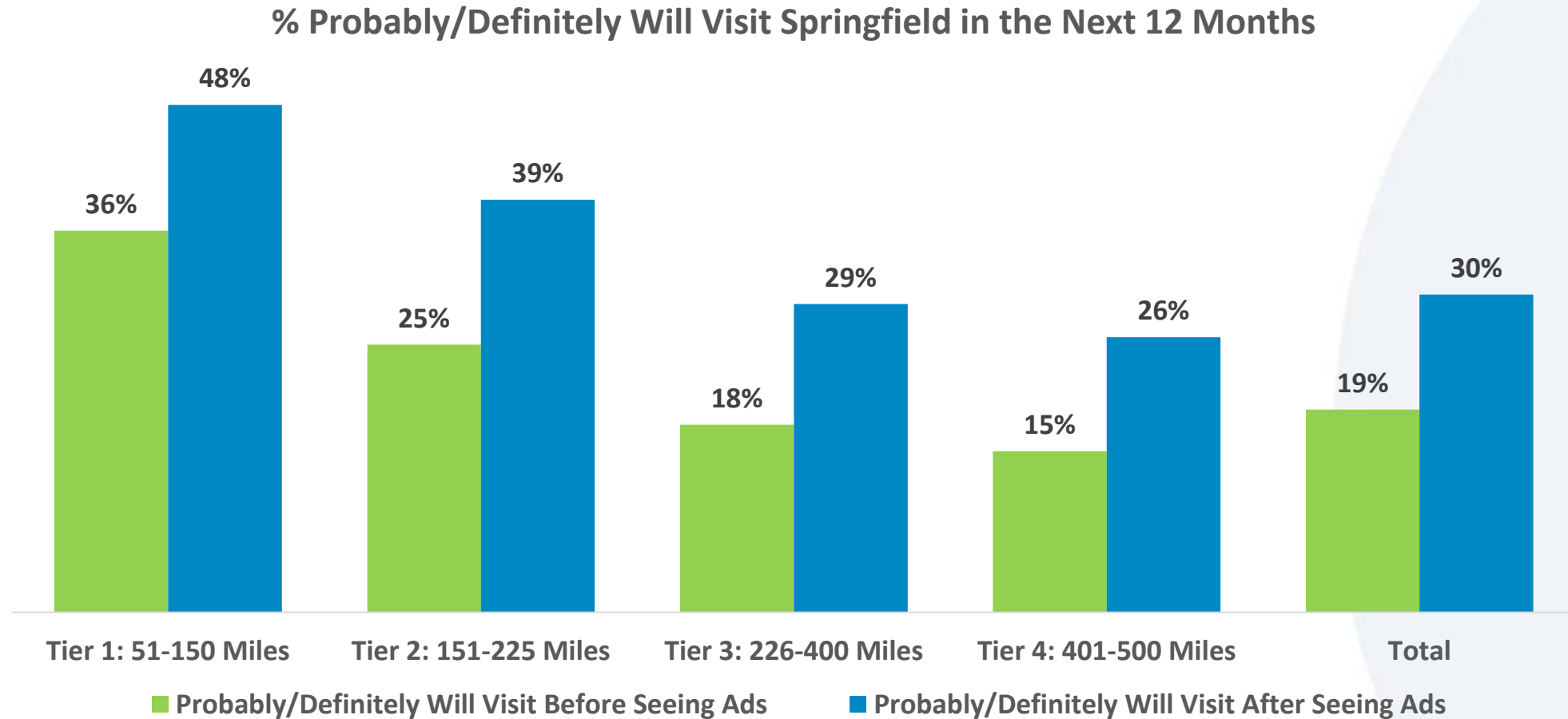


# Post-ad exposure intentions remain similar to past years, with travelers most likely to search for things to do in the area after seeing the ads.



Q42: After reviewing these ads, how likely would you be to take each of the following actions?

# Post-ad exposure variance in intent to visit Springfield increased across all market tiers and averaged +11 points, considerably higher than H2R's Norm (+7 points).



Q7: Using the scale provided, please indicate how likely you are to visit each of the following destinations in the next 12 months.

Q43: Using the scale provided, please indicate how likely you are to visit Springfield, MO in the next 12 months.

# Springfield Traveler Profile

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04

Springfield’s top of mind awareness increased to 1.2% across the target market this year, and improved its ranking into the top 20.

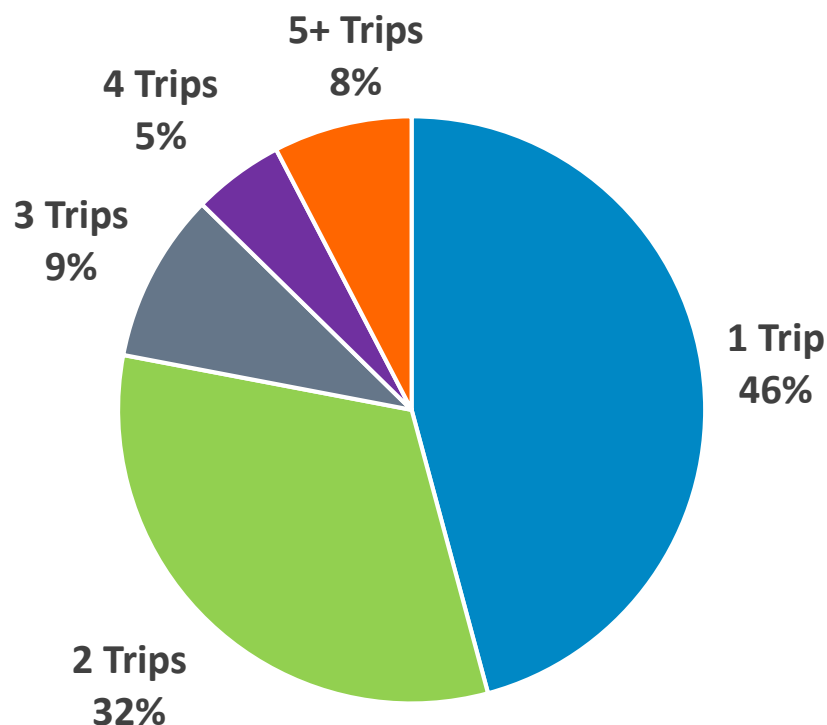


Rank	Destination	Awareness
1	Chicago, IL	6.1%
2	Branson, MO	5.6%
3	Kansas City, MO	5.2%
4	St. Louis, MO	4.5%
5	Nashville, TN	3.2%
6	Dallas, TX	3.2%
7	Las Vegas, NV	2.6%
8	New York, NY	2.3%
9	Denver, DO	2.3%
10	Florida	2.1%
11	New Orleans, LA	2.0%
12	Oklahoma	1.8%
13	Orlando, FL	1.8%
14	San Antonio, TX	1.6%
15	Memphis, TN	1.3%
16	Colorado	1.2%
17	<b>Springfield, MO</b>	<b>1.2%</b>
18	California	1.2%
19	Gatlinburg, TN	1.1%
20	Eureka Springs, AR	1.1%

Q5: When you think of cities in your region you would enjoy visiting for leisure, which destinations first come to mind?

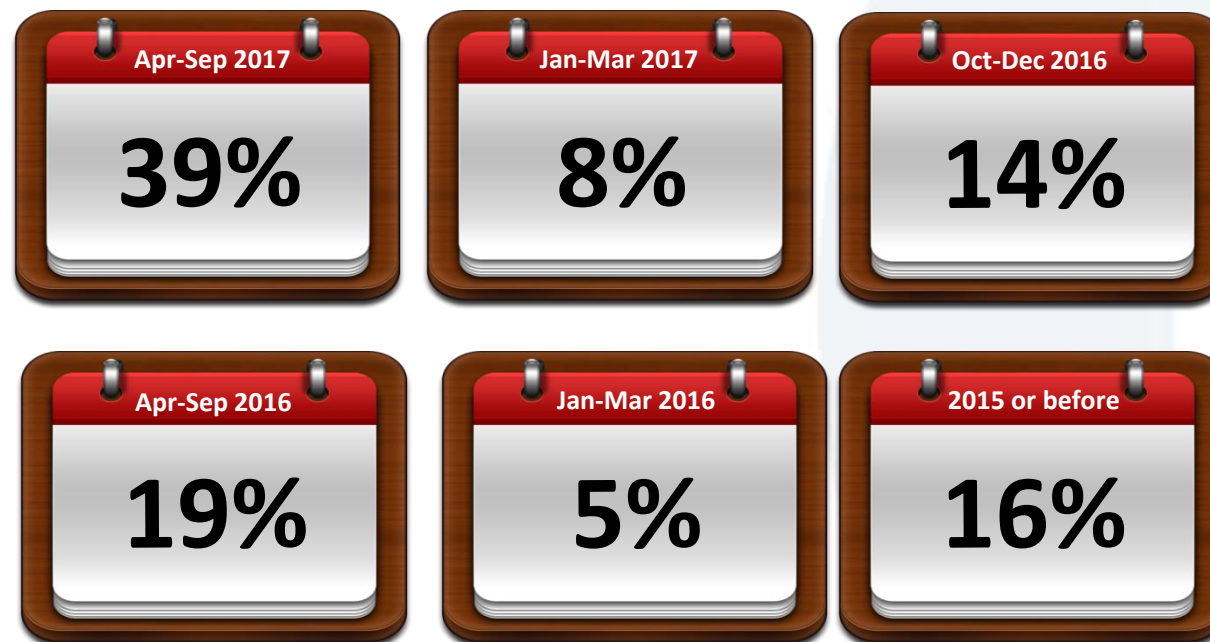
In the past 12 months visitors have made an average of 2 trips to the area, with the April-September timeframe being the most popular time of year to visit.

Number of Trips in Past 12 Months – 2.0



RESPONDENT BASE: SPRINGFIELD, MO VISITORS PAST 12 MONTHS | N=307

Most Recent Visit to Springfield, MO

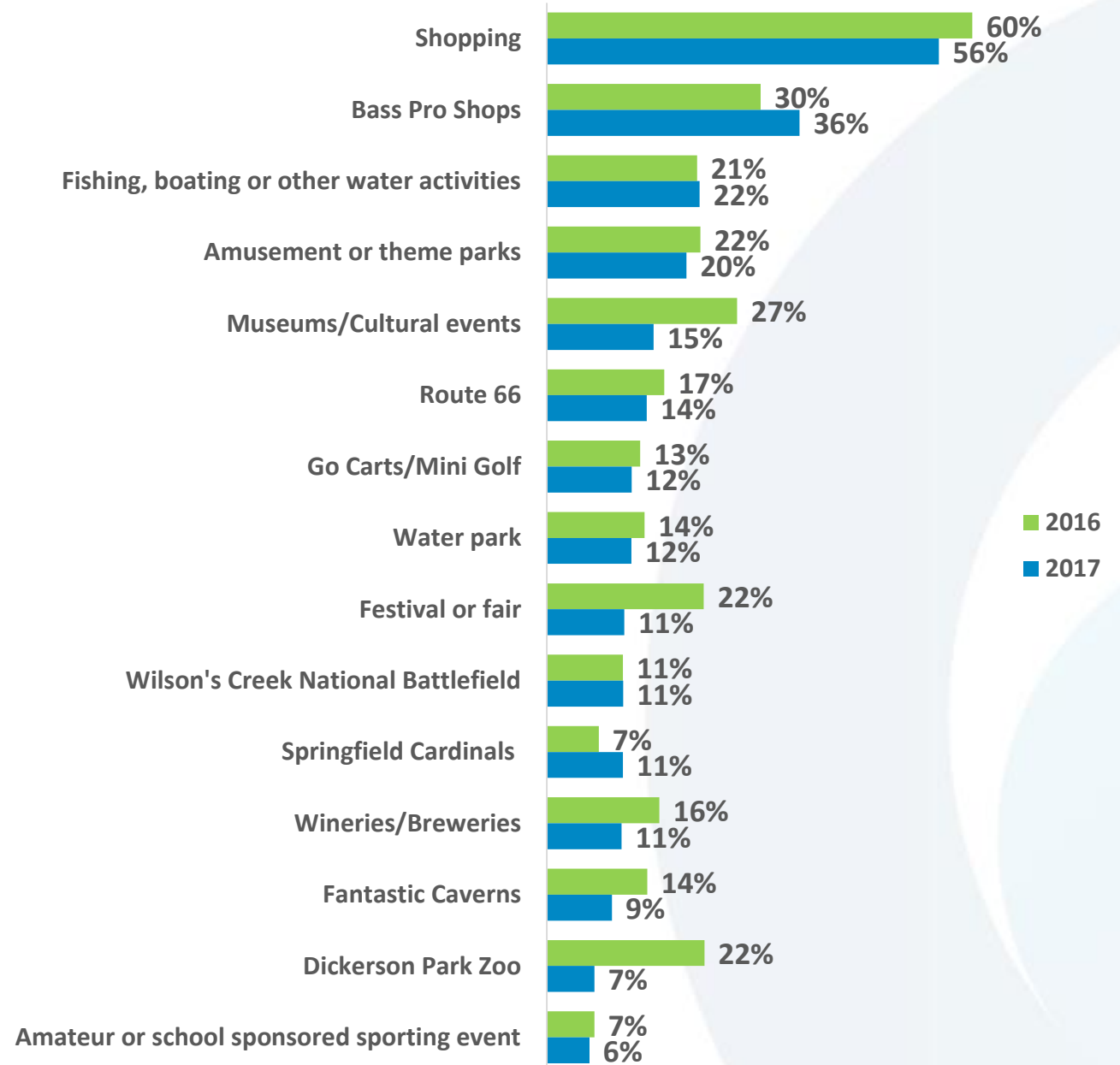


RESPONDENT BASE: SPRINGFIELD, MO VISITORS PAST 3 YEARS | N=431

# Area Activity Participation

Shopping and Bass Pro Shops continue to be travelers' most popular activities while in Springfield.

Bass Pro saw an increase in visitation this year, along with Springfield Cardinals and fishing, boating and other water activities.





# Springfield’s primary functional drivers include Shopping and Bass Pro Shops.



Shopping  
**31%**



Bass Pro Shops  
**19%**

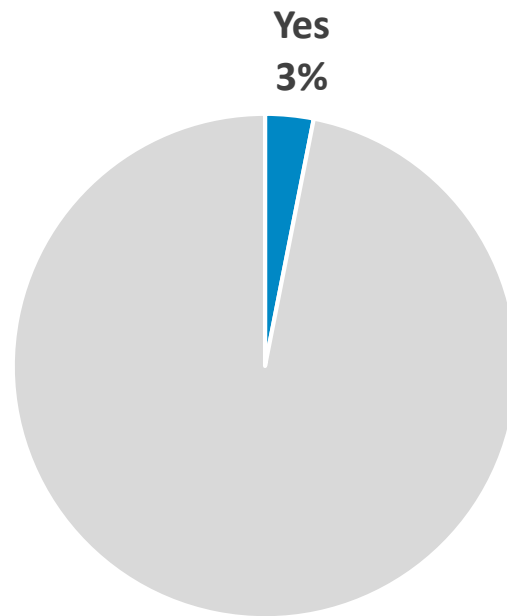


Amusement/Theme Parks  
**12%**

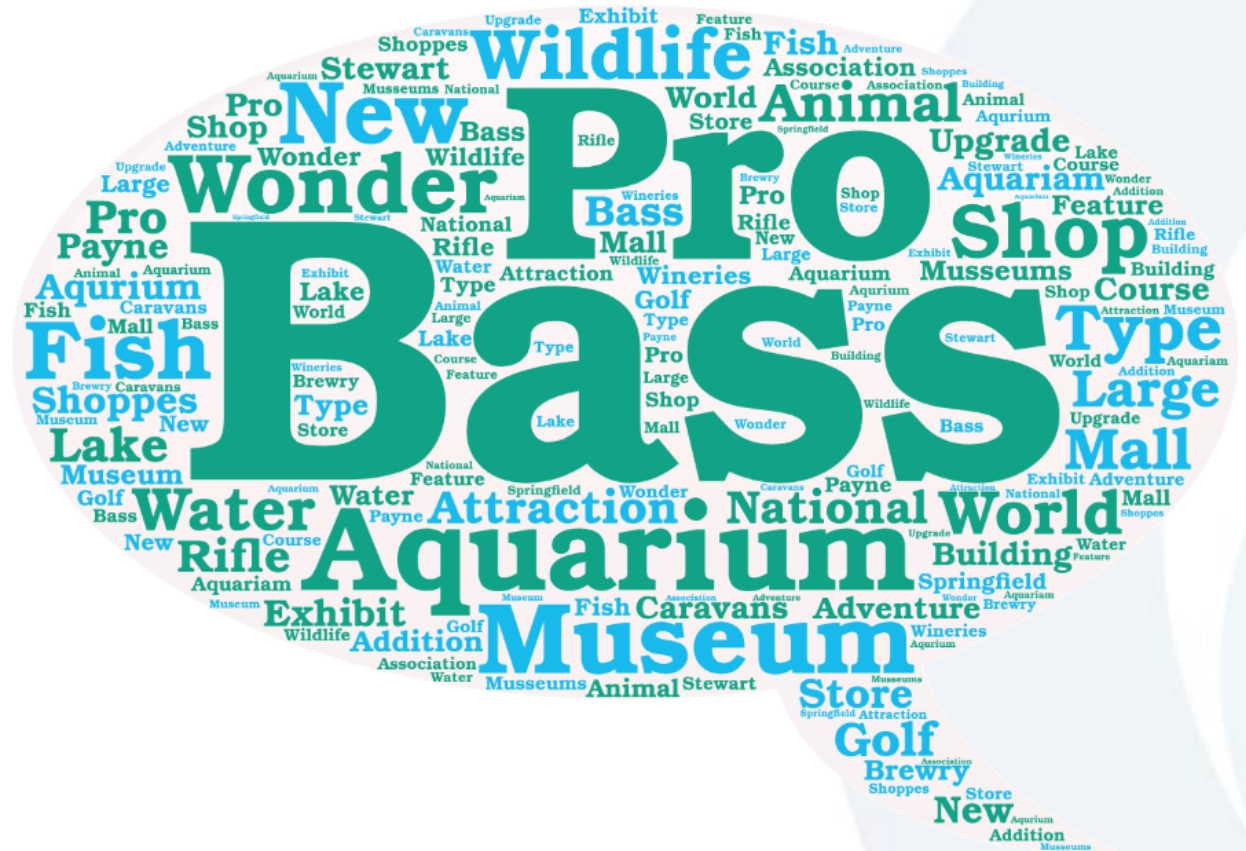
Q14: Of these activities, please indicate if there were any that were a major influence in your decision to visit Springfield, MO on your most recent trip.

**Unaided, only about 3% of visitors indicated they were aware of any new activities/attractions opening in Springfield. Though, those who were aware were most likely to indicate a Bass Pro attraction.**

## Aware of New Attractions (Unaided)



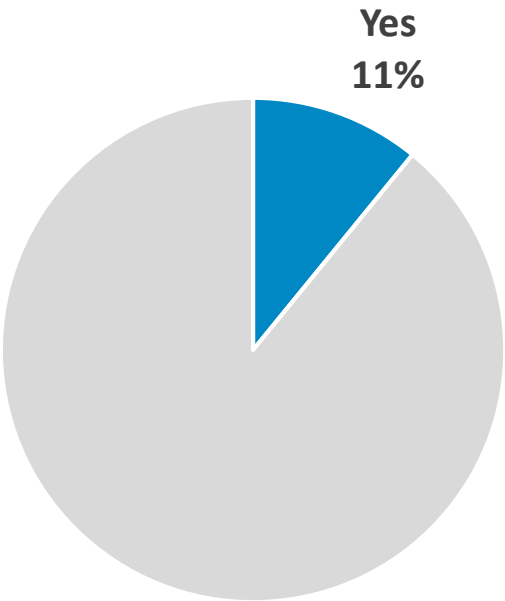
RESPONDENT BASE: SPRINGFIELD, MO VISITORS PAST 3 YEARS | N=431



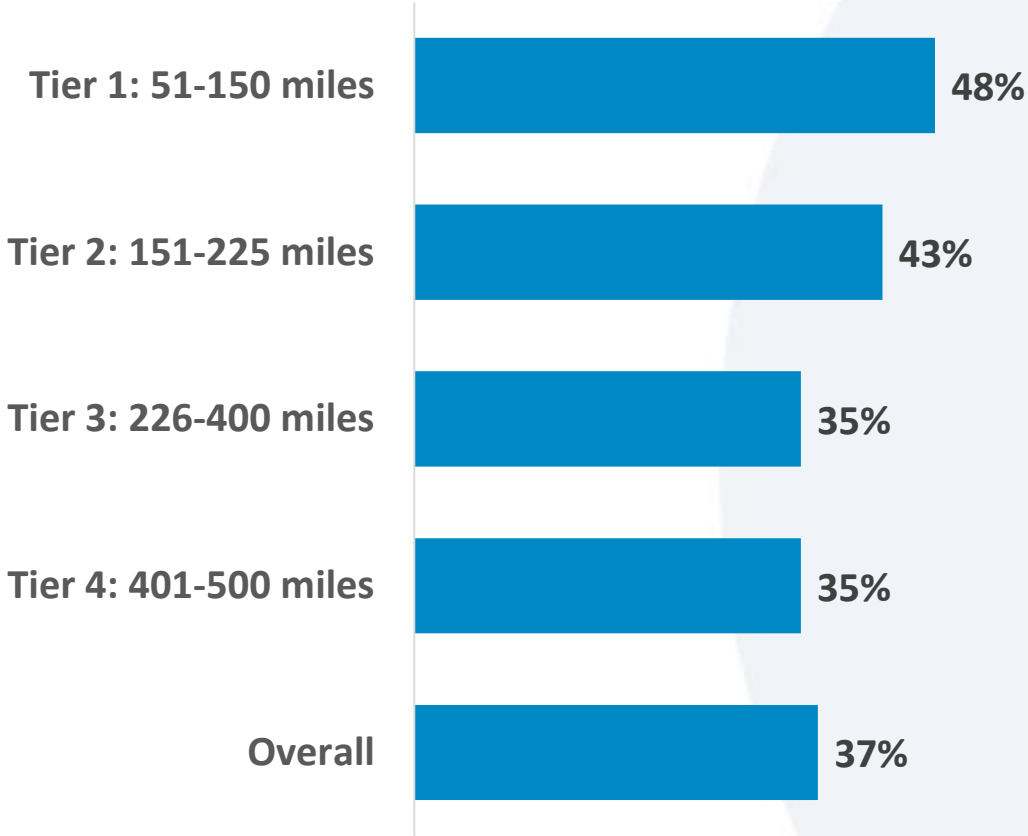
RESPONDENT BASE: AWARE OF A NEW ACTIVITY/ATTRACTION | N=50

Aided awareness of Wonders of Wildlife is higher, and more than one-third of those familiar with the area intend to visit the attraction in the next 3 years.

Aware of Wonders of Wildlife  
Museum & Aquarium

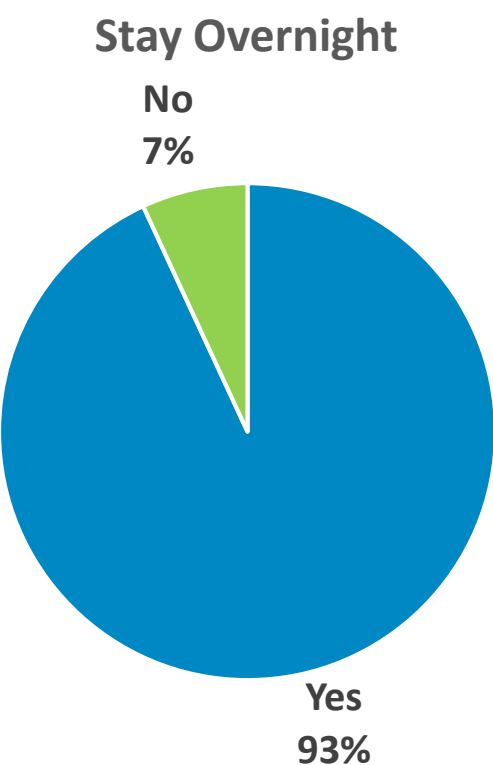


% Probably/Definitely Will Visit WoW



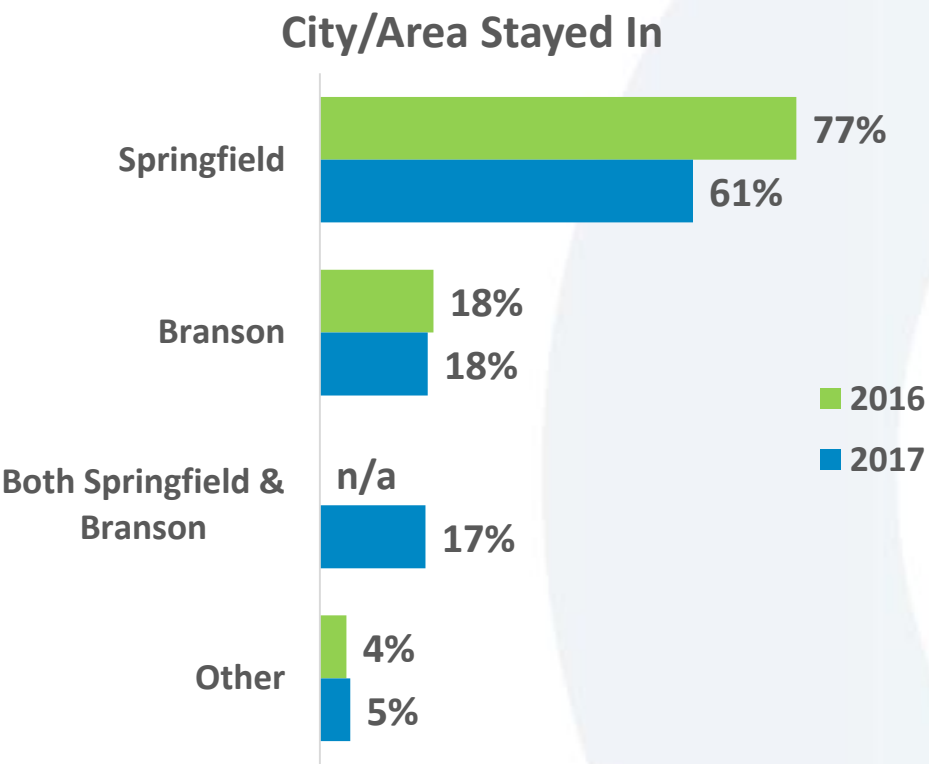
Q27: Are you aware that the Wonders of Wildlife National Museum & Aquarium re-opened in Springfield, MO on September 21st, 2017? Q28: Using the scale provided, please indicate how likely you are to visit Wonders of Wildlife in the next 3 years.

# Overnight visitation increased to 93% in 2017, with visitors staying overnight an average of 3 nights—similar to last year.



RESPONDENT BASE: SPRINGFIELD VISITORS LAST 3 YEARS | N=431

**3.0**  
Nights in the Area

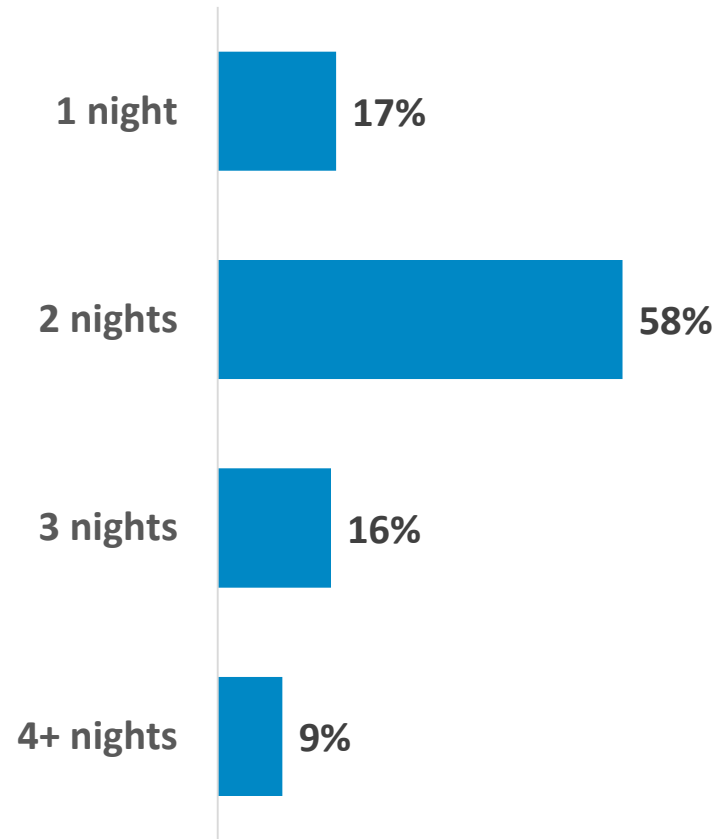


RESPONDENT BASE: ALL OVERNIGHT VISITORS | N=333

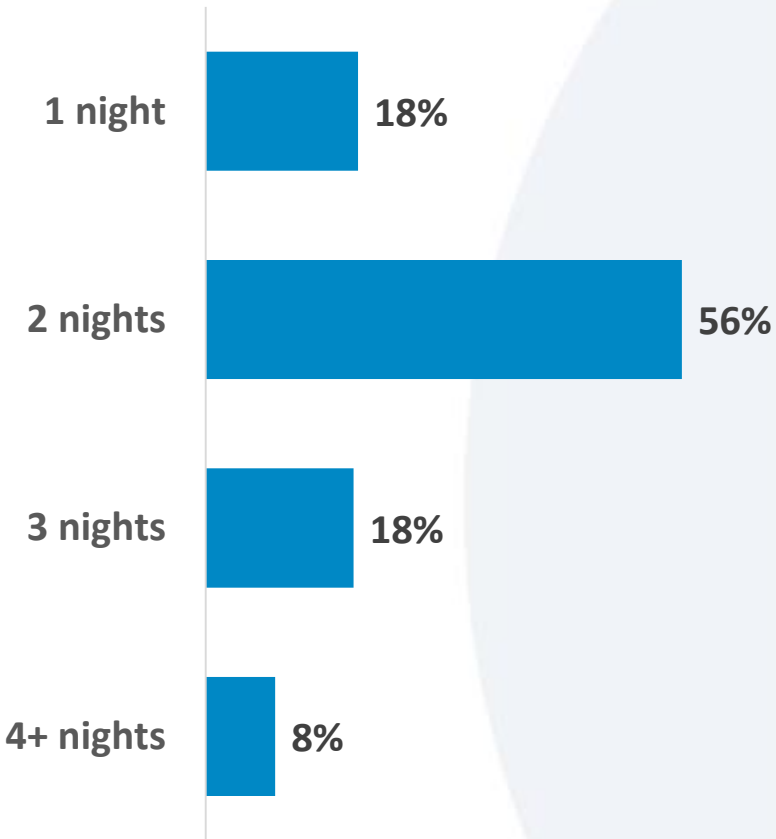
Q17: How many nights did you spend in the area on this trip?  
Q18: In which of the following cities/areas did you spend the night on your most recent visit to the Springfield area?

# Those who stayed in both Branson and Springfield spent about half of their time in each destination.

Nights Spent in Springfield – 2.2

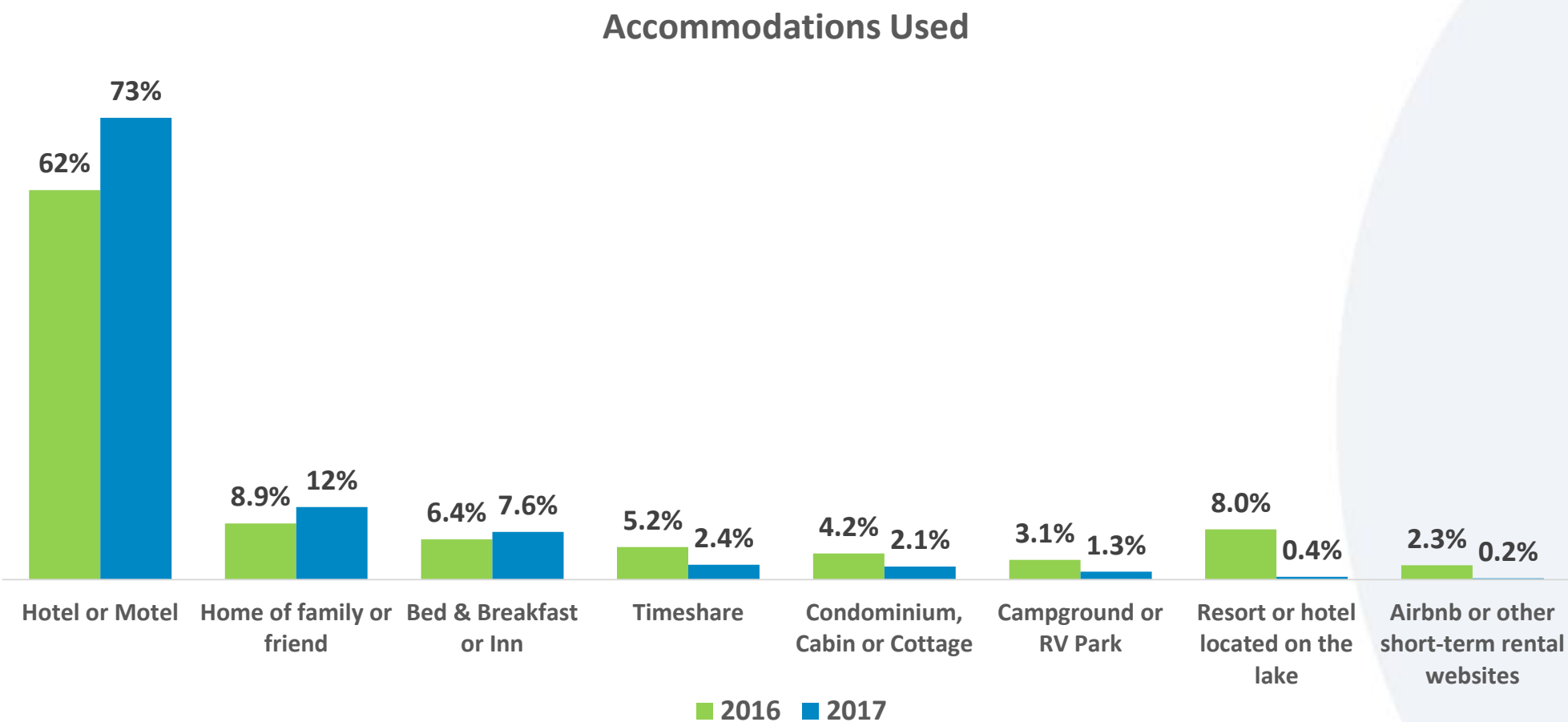


Nights Spent in Branson – 2.2



Q19: Of the [PIPE ANSWER FROM Q18], how many were in each of the following destinations?

The majority of Springfield visitors chose to stay at a hotel/motel this year—with a significant increase over 2016 levels.



Q20: Which of the following best describes the type of accommodations you used on your most recent trip?



# Demographic Profile of Springfield Visitors

	Visitors in Past 12 Months	Non-Visitors	Prospects*	Brand Advocates**
Respondent Age	45	43	45	43
Children in the Home	47%	42%	49%	56%
No Children	53%	58%	51%	44%
Males	31%	29%	30%	28%
Females	69%	71%	70%	72%
Caucasian or White	89%	82%	85%	80%
African American or Black	6%	9%	6%	9%
Other Ethnicity	6%	10%	9%	10%
HH Income	\$74.2k	\$62.5k	\$72.0k	\$62.5k
Distance	178 miles	314 miles	198 miles	237 miles
% College Graduate +	56%	47%	51%	42%

\*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.

# Add On: Halo Effect & Resident Sentiment

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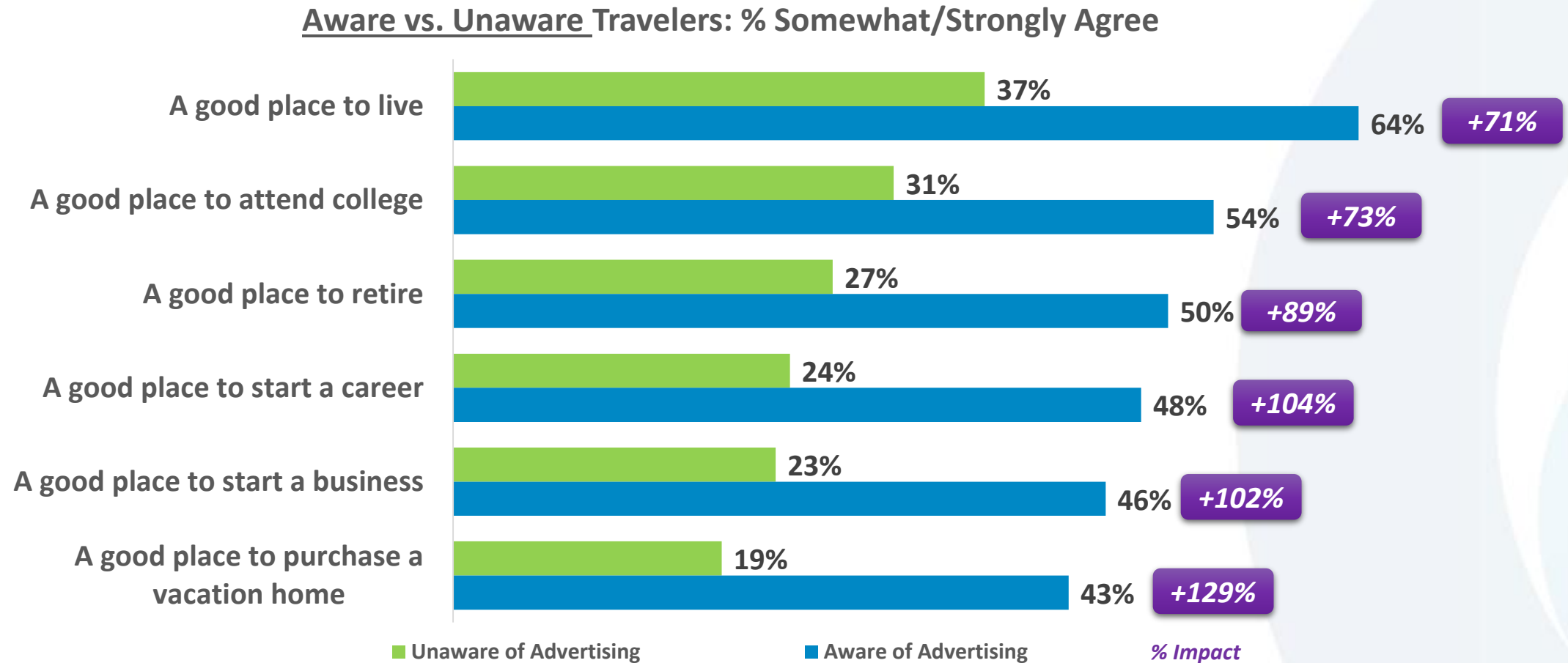
05

# Halo Effect in Tourism Marketing: Target Market Travelers

- The psychology of one characteristic of a brand having an effect upon the overall character of that brand is known as a Halo Effect. For example, consumers' positive image of tourism advertising can have a positive impact on how they view the destination as a place for leisure travel.
- Knowing this, it is possible to determine the degree to which tourism advertising also impacts other parts of the destination—such as a place to live, work, start a business, attend college, purchase a vacation home or retire. For this research, the same characteristics that the Missouri Division of Tourism measured are measured here. The next several slides show the overall impact of advertising and visitation on the perception of the area.



# Tourism advertising has a major impact on travelers' perception of the area as a place to live, attend college, retire, etc.

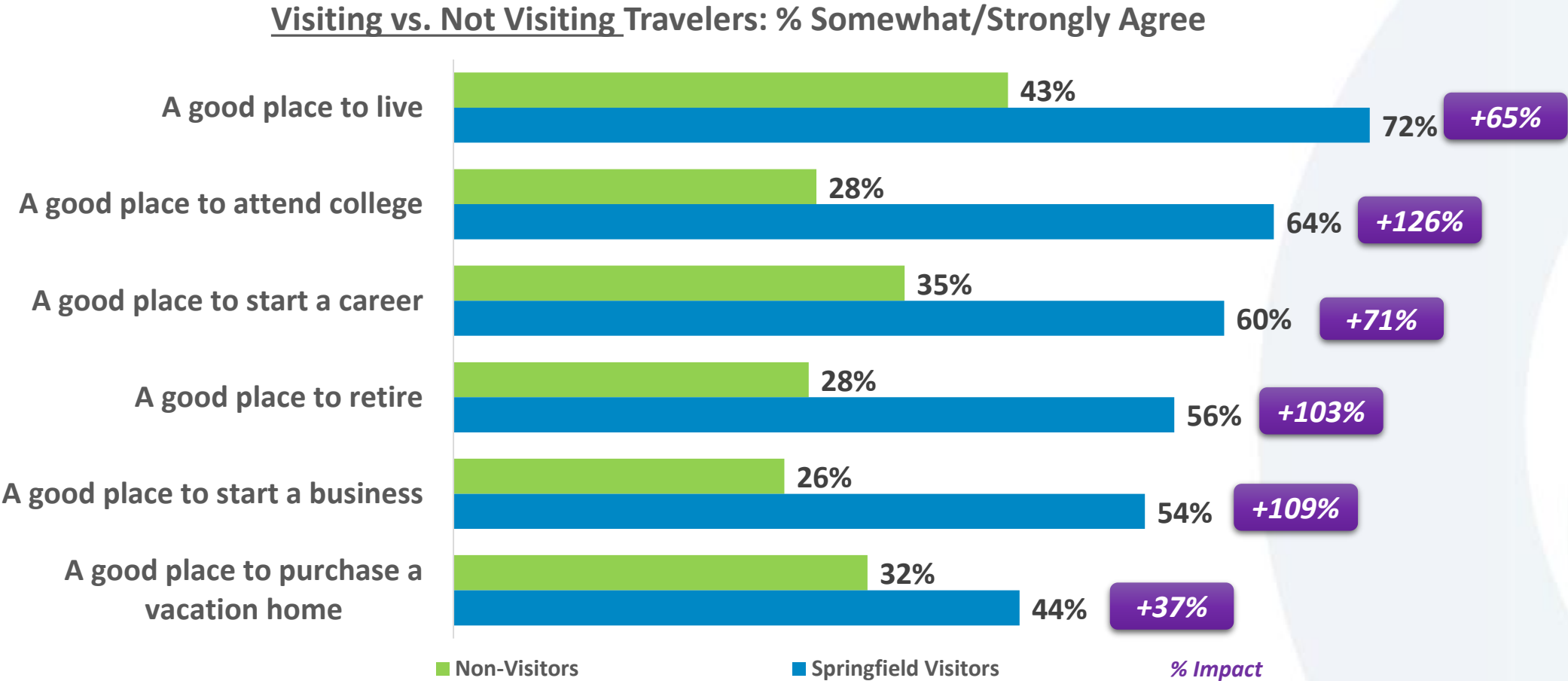


Q26: Please indicate how much you agree or disagree that each of the following words/phrases describes Springfield, MO when thinking about it as a place to live, work, raise a family or start a business.

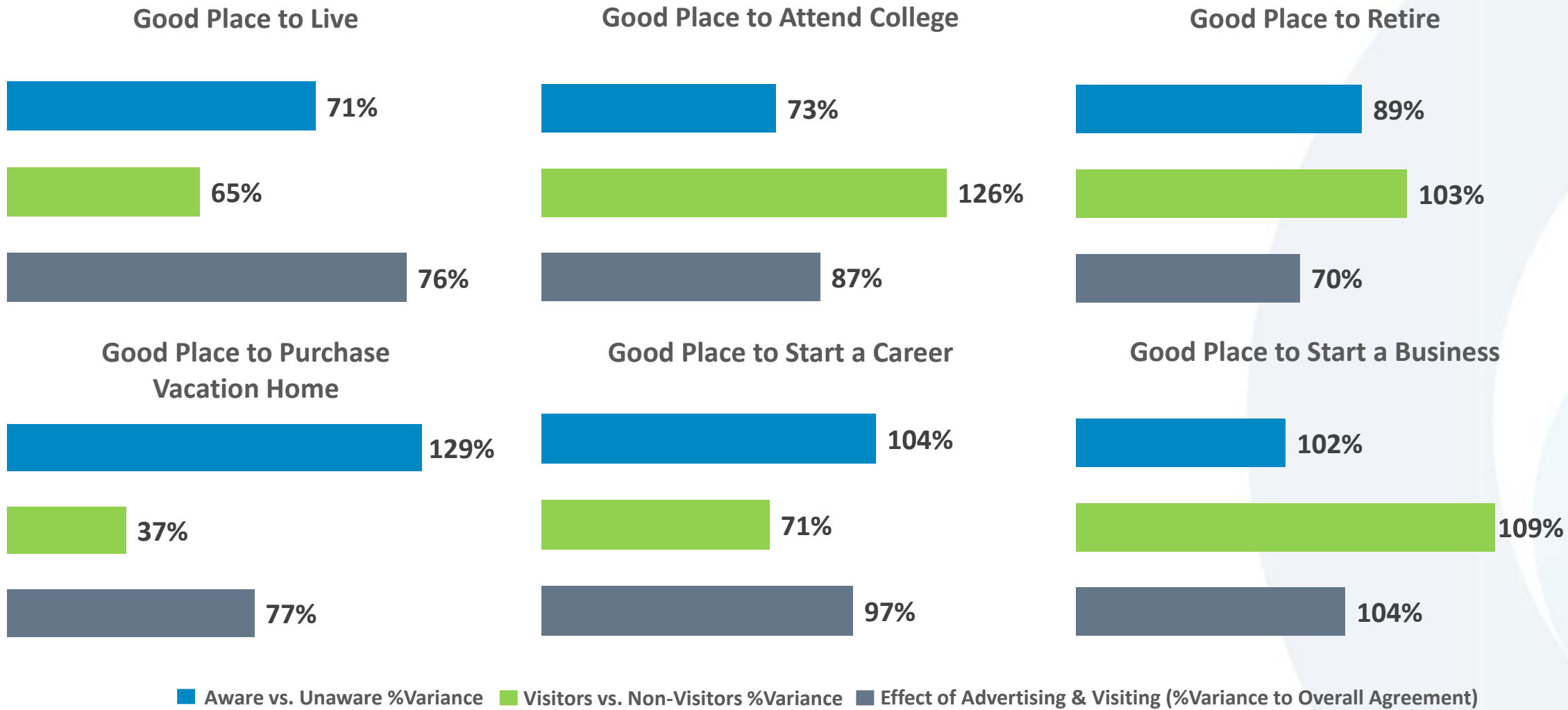
\*The Indexed Variance is the % Change from the baseline, where an index of 100 is equal to the baseline.

48  
RESPONDENT BASE: AWARE TRAVELERS | N=781  
UNAWARE TRAVELERS | N=1,119

# Visiting Springfield in the past year also has a positive impact on travelers' perceptions of the area—especially as a place to attend college.



# Impact of Advertising and Visiting on Springfield, MO Image



Q26: Please indicate how much you agree or disagree that each of the following words/phrases describes Springfield, MO when thinking about it as a place to live, work, raise a family or start a business.

RESPONDENT BASE: AWARE TRAVELERS | N=781  
UNAWARE TRAVELERS | N=1,119 50  
SPRINGFIELD VISITORS IN PAST 12 MONTHS | N=307  
SPRINGFIELD NON-VISITORS | N=1603

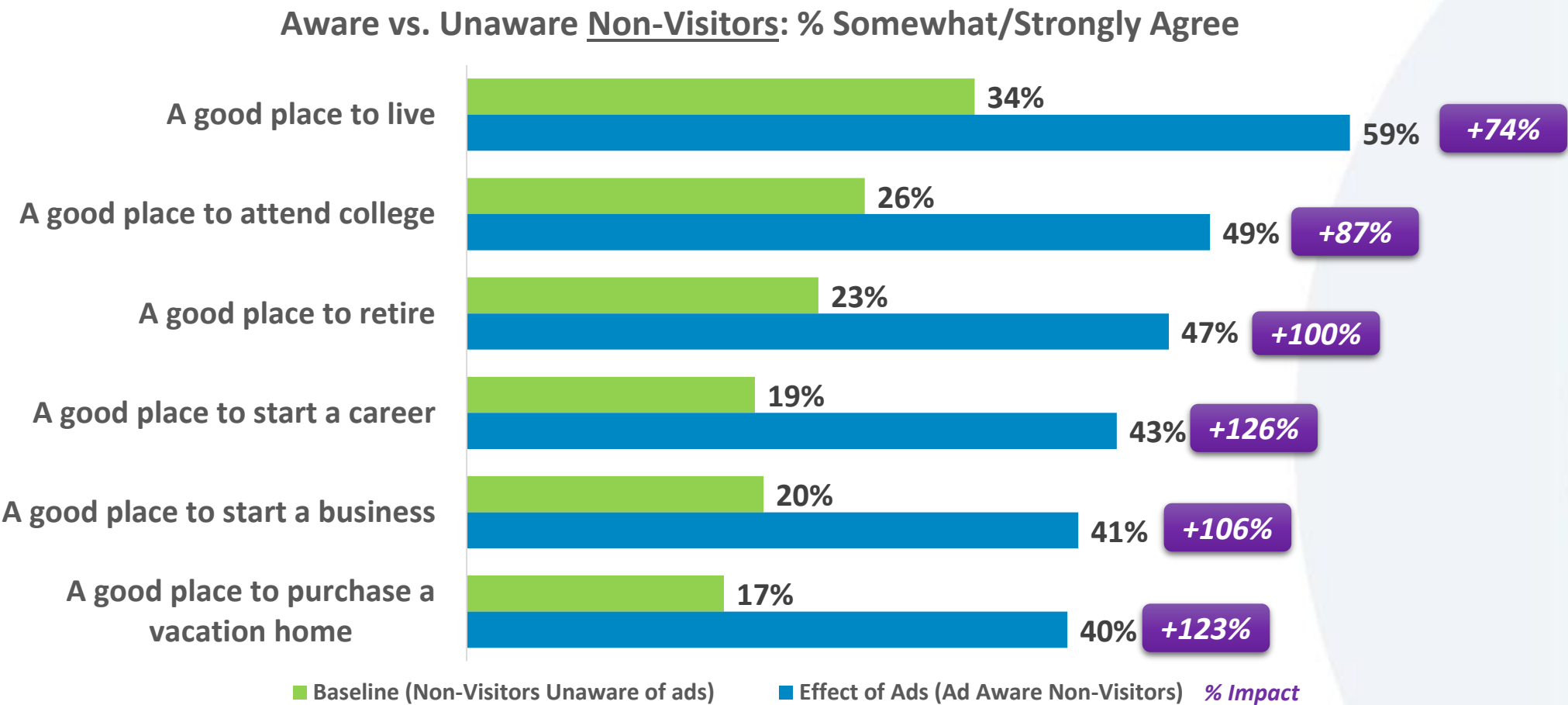


# Impact Advertising & Visitation on Unaware Non-Visitors

- Taking the research a bit further, the following slides outline the impact advertising and visitation have on the opinions of those who haven't visited the area in the past 12 months and have not seen a 2017 Springfield Advertisement.
- Each of the following slides shows the effect of the advertising, the effect of visiting and the impact of both visiting and seeing ads on the opinions of unaware non-visitors.

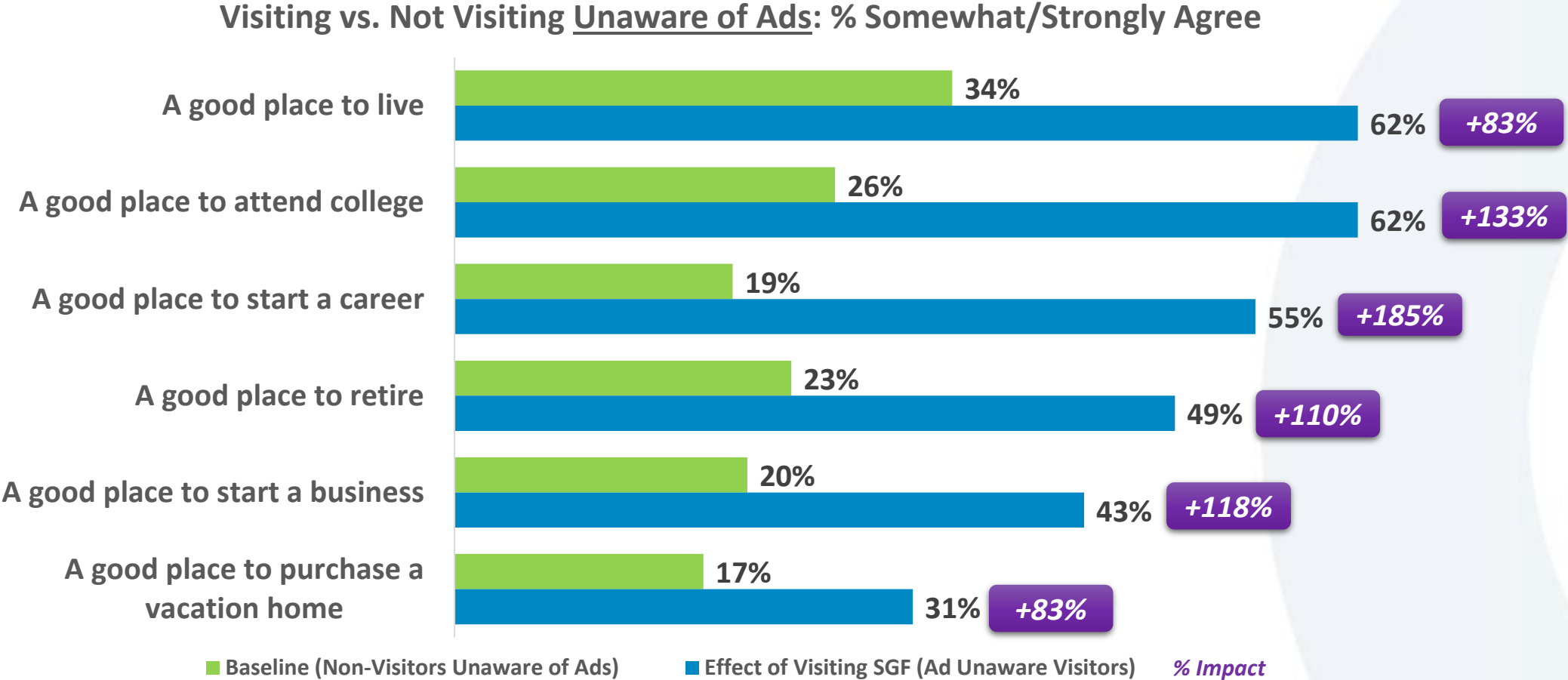


The impact of advertising among non-visitors is even greater. Aware non-visitors are 126% more likely to agree that Springfield is a good place to start a career.



Q26: Please indicate how much you agree or disagree that each of the following words/phrases describes Springfield, MO when thinking about it as a place to live, work, raise a family or start a business.

# Furthermore, visiting Springfield (without seeing an ad) has also has an impact on travelers' perceptions of the area in general.

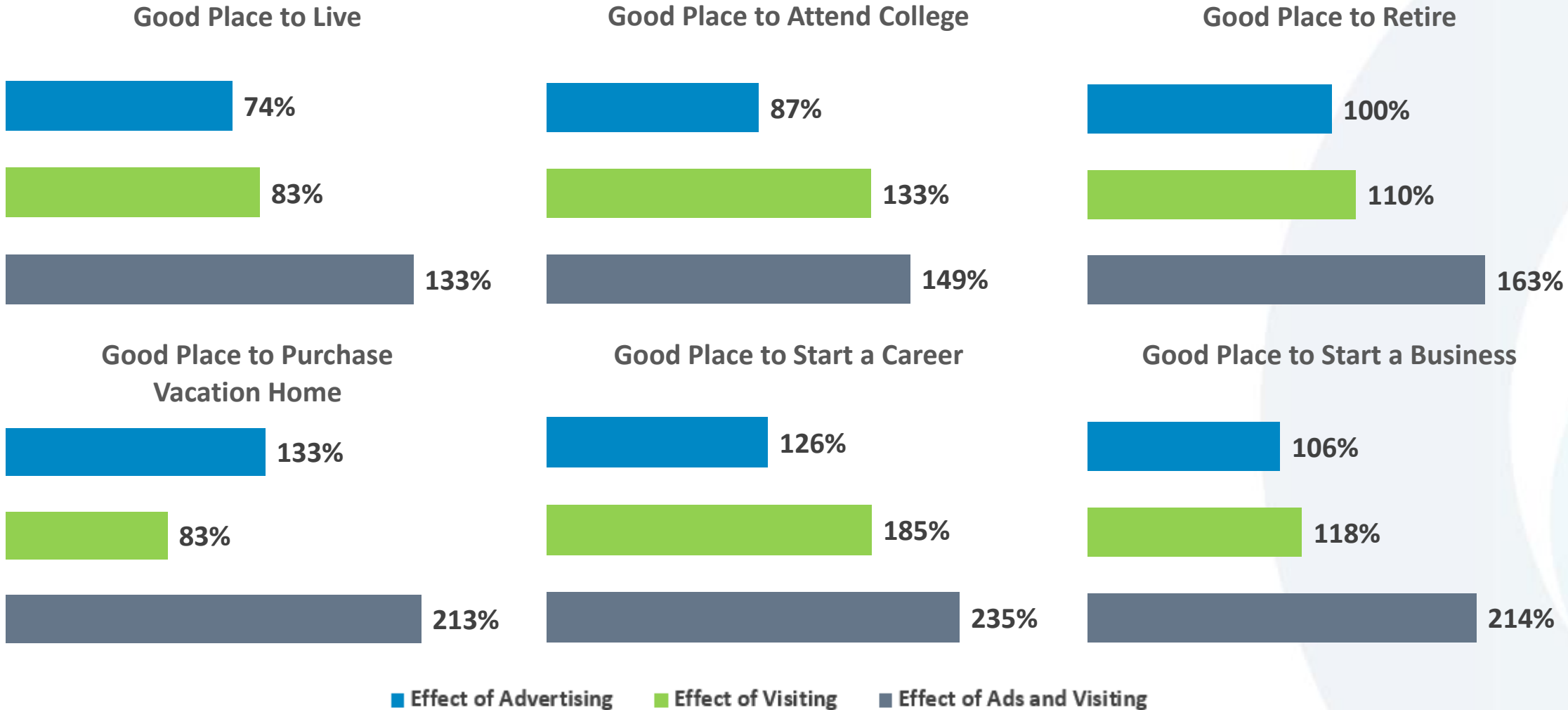


Q26: Please indicate how much you agree or disagree that each of the following words/phrases describes Springfield, MO when thinking about it as a place to live, work, raise a family or start a business.

\*The Indexed Variance is the % Change from the baseline, where an index of 100 is equal to the baseline.

# Impact of Advertising and Visiting on Springfield, MO Image

% SOMEWHAT/STRONGLY AGREE – %VARIANCES TO BASELINE



Q26: Please indicate how much you agree or disagree that each of the following words/phrases describes Springfield, MO when thinking about it as a place to live, work, raise a family or start a business.

RESPONDENT BASE: UNAWARE NON-VISITORS | N=1,001  
AWARE NON-VISITORS | N=602  
UNAWARE VISITORS | N=128  
AWARE VISITORS | N=179

# Resident Sentiment

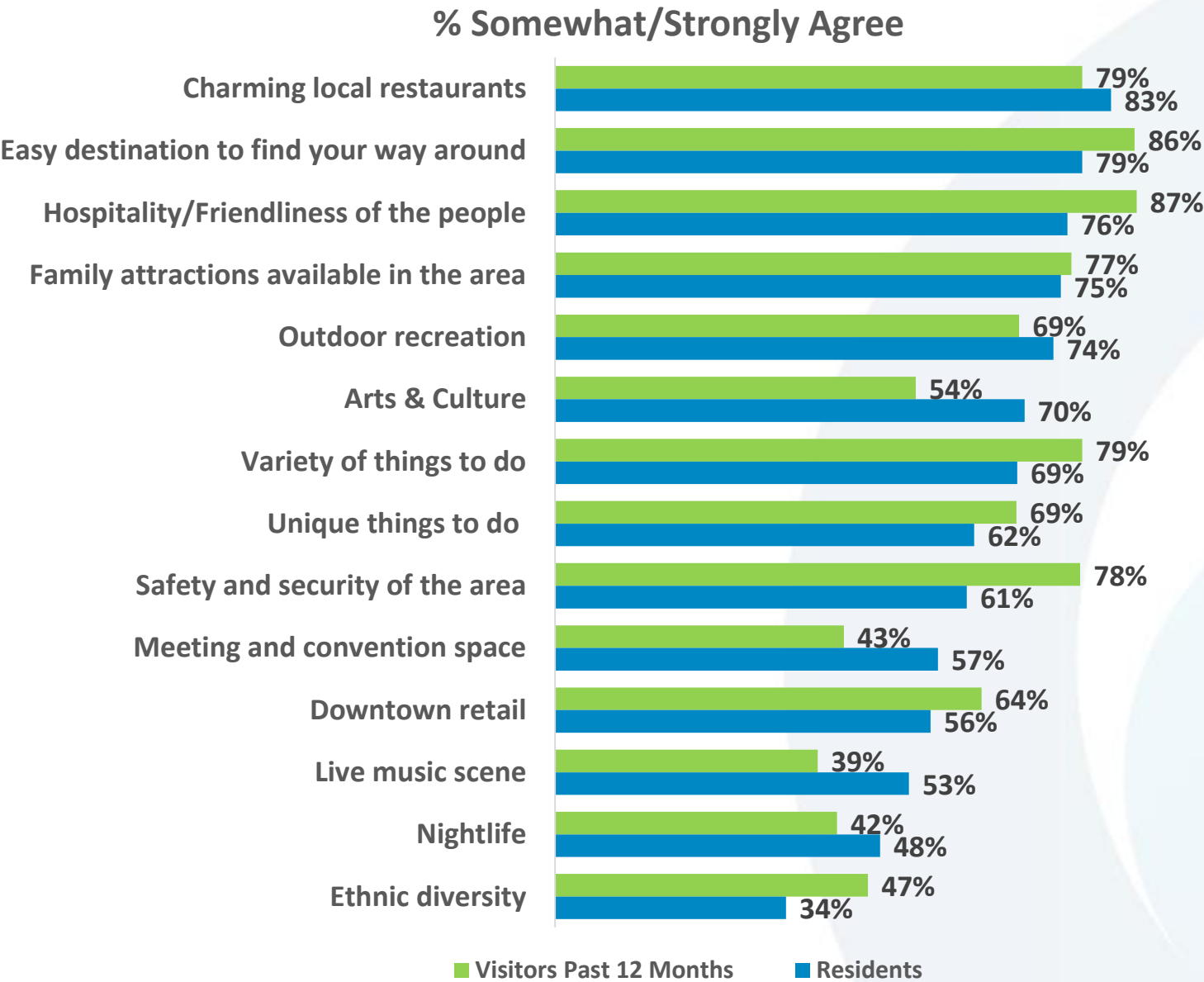


- This year, an additional sample from Springfield, MO residents was collected to determine the perception of Springfield as a travel destination among residents.
- The following section outlines the sentiments of residents and explores any enthusiasm gaps between residents and recent visitors to Springfield.

# Springfield, MO Satisfaction

Resident and recent visitor satisfaction with Springfield as a travel destination align fairly closely.

Residents are more satisfied with local restaurants, arts and culture, outdoor recreation, meeting space, live music and nightlife while visitors are more satisfied with the remainder of metrics. Specifically, recent visitors are significantly more satisfied with the safety of the area compared to local residents.



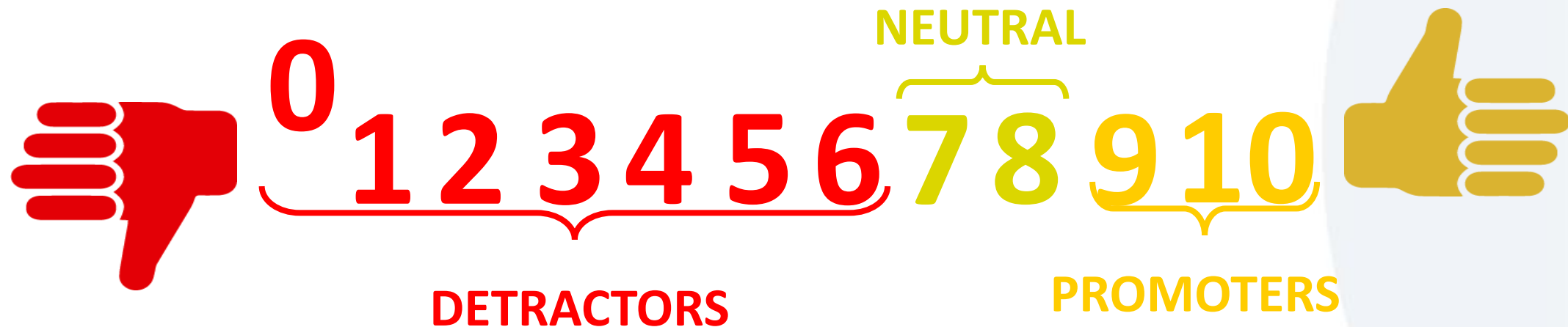
Q25: Using the scale provided, please rate how satisfied you are with following characteristics of Springfield, MO as a travel destination.

# Net Promoter Score

NPS (Net Promoter Score) 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?”**



$$\text{Net Promoter Score} = (\% \text{ Who are Promoters}) - (\% \text{ Who are Detractors})$$

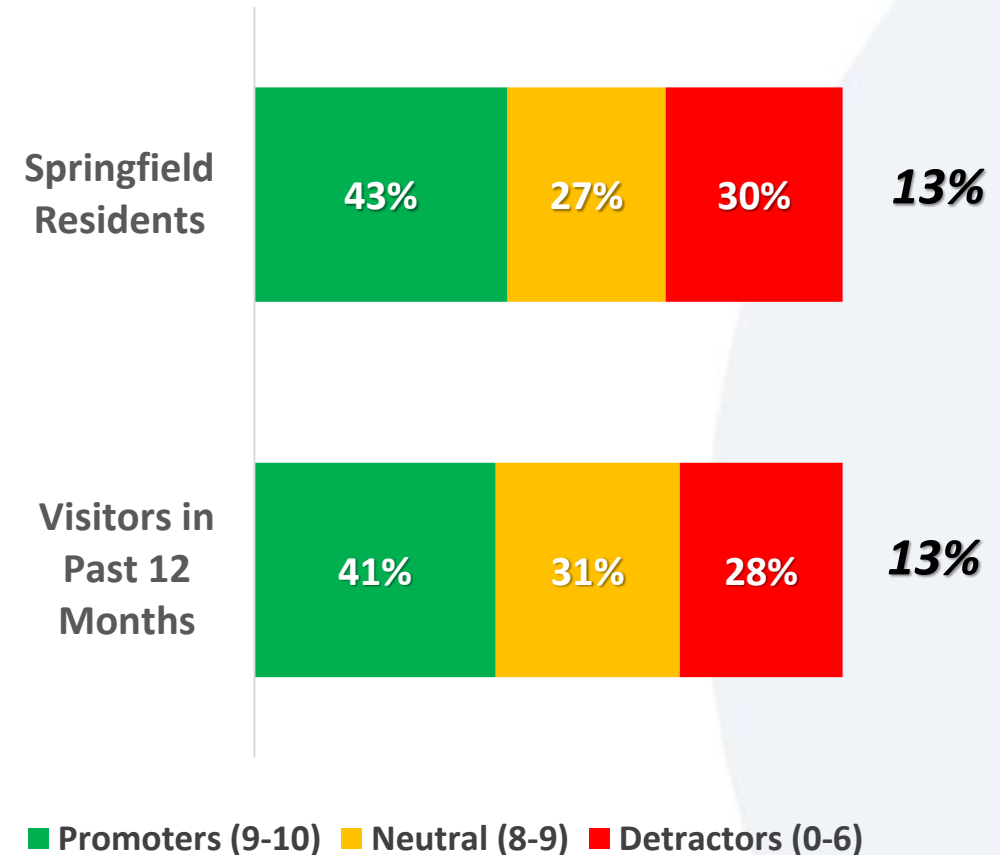
*\*NPS tends to be somewhat volatile because the calculation of a net score requires that the ratio of detractors be deducted from the ratio of promoters which often times exaggerates the variance as well as the margin of error.*



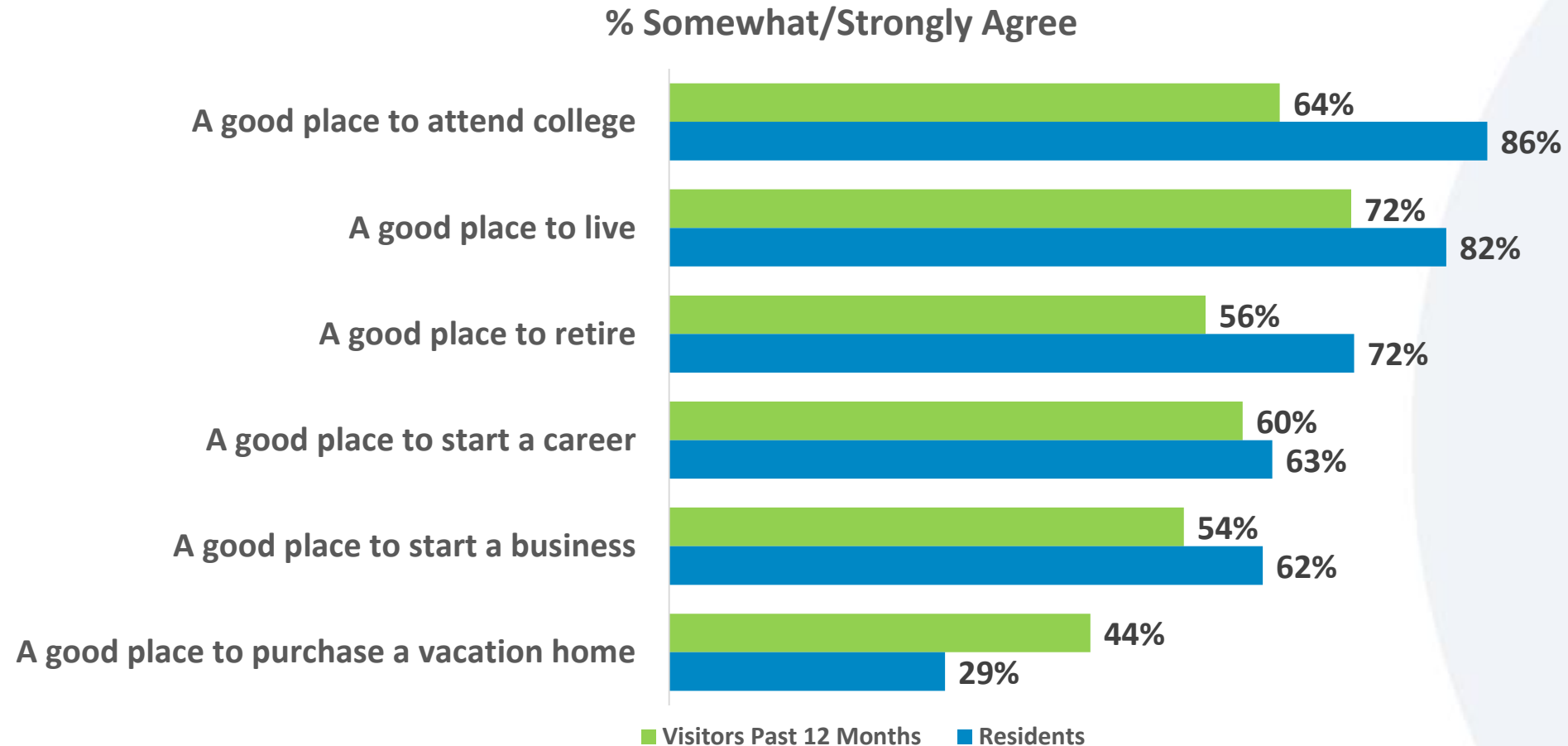
# Net Promoter Score

The NPS among residents is nearly identical to that of recent visitors.

While there are slightly more Promoters among Springfield residents unfortunately there are also a few more Detractors. The area has some work ahead of them to make Springfield a share-worthy destination among both residents and visitors.



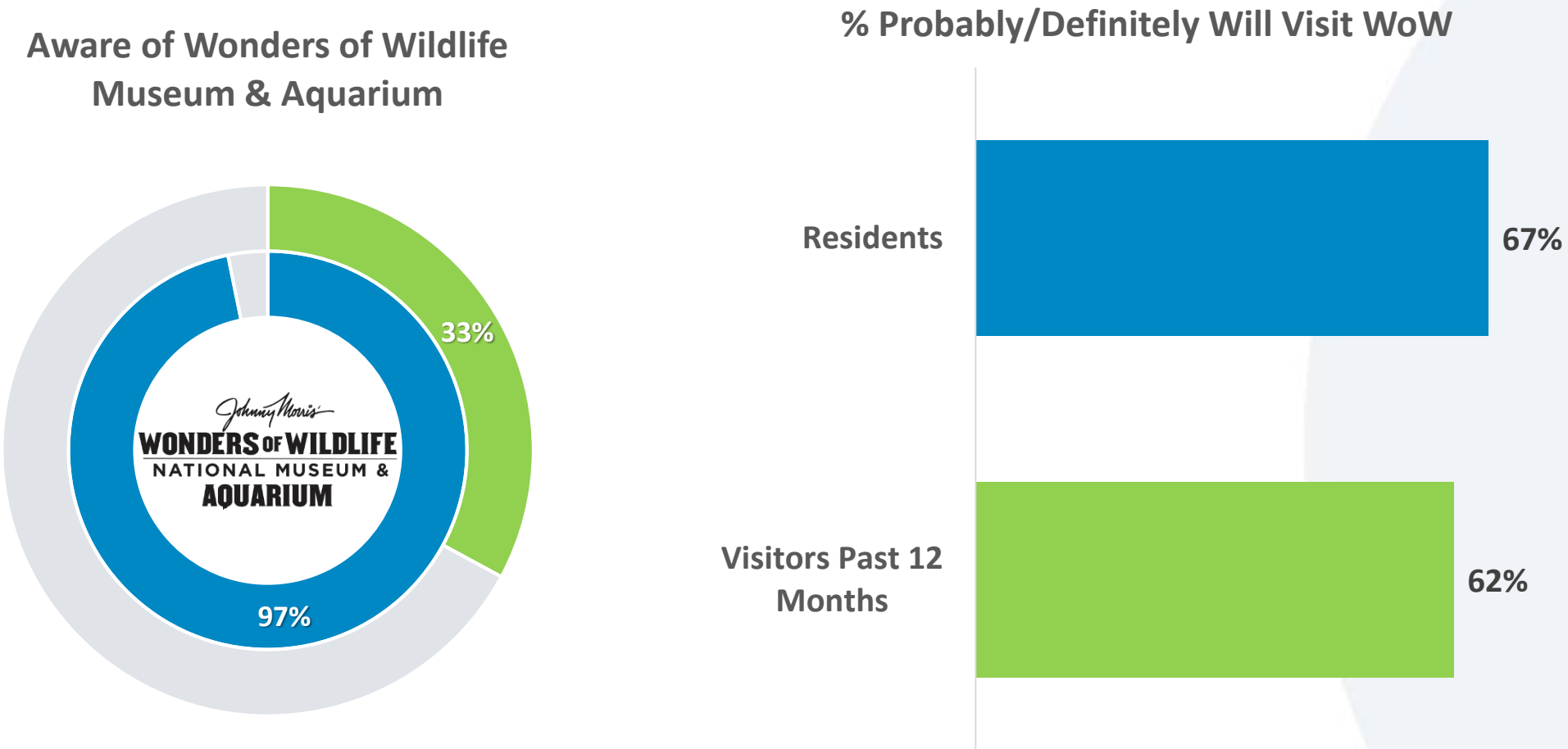
# Springfield residents are more likely to agree that the area is great as a place to attend college and live, but are much less likely to think of it as a place to purchase a vacation home.



Q26: Please indicate how much you agree or disagree that each of the following words/phrases describes Springfield, MO when thinking about it as a place to live, work, raise a family or start a business.

RESPONDENT BASE: SPRINGFIELD, MO RESIDENTS | N=93 59  
VISITORS PAST 12 MONTHS | 307

# While residents are significantly more aware of the new Wonders of Wildlife, intent to visit the attraction is nearly identical between residents and recent visitors to Springfield.



# Thank You!



*Reveal Your Customer's Full Experience*

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