



**Convention & Visitors Bureau**

## FY 2015 Marketing & Media Effectiveness Study

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*Prepared by*



# Project Overview

## **PURPOSE**

The purpose of this study was to measure the incremental impact Springfield Convention & Visitors Bureau's (CVB) FY 2015 marketing campaign had on visitation and spending, as well as to calculate a marketing ROI. The results of this study have been compared to the FY 2011 campaign for context, where applicable.

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## **TARGET AUDIENCE**

The Springfield FY 2015 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 2015 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 1,300 respondents were interviewed for this Marketing & Media Effectiveness study. This sample size provides for a maximum margin of error of +/-2.7% at a 95% confidence interval overall. The sample sizes for each individual market were: St. Louis (200), Kansas City (200), Tulsa (200) and within a 500 mile radius of Springfield (700).

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# Executive Summary

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# Marketing Efficiency

- Overall awareness of Springfield's FY 2015 Marketing Campaign was strong at 38.7% overall, on par with FY 2011 (39.7%) when awareness in target markets was last measured. Ad awareness was also stronger than the H2R Industry Norm of 32.6%\*.
- Extrapolated across the population of traveler households, overall awareness reached approximately 7.1 million in the target markets measured.
- Springfield's collection of Video ads garnered the most awareness (23.8%) followed closely by the Print collection (23.4%) and Digital (21.7%). Radio (19.9%) and Email (17.5%) mediums also combined to help reach the target market.
- The Springfield CVB invested \$800k in the FY 2015 leisure marketing campaign. Given the total market reach of 7.1 million households, the average cost per aware traveler household was excellent at \$0.11—considered very efficient by industry standards.



## Incremental Impact

- The FY 2015 Marketing Campaign produced incremental visitation of 1.5%, an increase of 0.2% compared to incremental visitation from the FY 2011 campaign.
- Extrapolated across aware households, incremental visitation accounted for more than 110k additional trips to the area, resulting in more than \$58 million in incremental travel revenue that would not have been generated for Springfield in the past 12 months had the campaign not occurred.
- These incremental trips also generated incremental room nights for the area. With an average length of stay of more than 3 nights across all lodging categories (and 2.2 nights among hotels/motels in Springfield), more than 300k additional commercial room nights\* were generated throughout the region --and more than 100k incremental hotel room nights were generated for Springfield or about 8% of the total.
- Given a leisure marketing budget of \$800k, this year's campaign generated an ROI of \$73—an increase of \$12 over the FY 2011 campaign (\$1.0M in leisure marketing spending).

*\*Includes hotel/motel, bed & breakfast, condos/cabins/cottages, Airbnb, campgrounds/RV parks and resorts.*



# Advertising Evaluation

- More than 68% of travelers felt the advertisements in this year's campaign made Springfield seem more appealing—7% higher than the H2R Industry Norm of 63%. Tulsa yielded the strongest appeal ratings (77%).
- Travelers found the ads relevant to their needs (68%), felt the ads fit well with the Springfield brand (81%) and indicated they were differentiated from other advertising (45%). While all of these metrics were higher than the H2R Industry Norms (52%, 69% and 42% respectively), it will be interesting to see how these scores evolve over time once the new advertising and branding efforts have had an opportunity to saturate the market place.
- Springfield's variety (41%) and natural, scenic beauty (32%) were the most prominent messages taken away from the advertisements.
- Most importantly, the ads generated a positive lift in intent to visit the area in the next 12 months (+14%)—much higher than the H2R Industry Norm for lift (+6%). Families also had an extremely high lift in intent to visit the area after viewing the ads (+15%).



# Springfield Visitors

- Eight in ten visitors from the past year indicated they would return to the area in the next 12 months. Additionally, more than half of these same visitors indicated they would recommend Springfield as a leisure destination to friends/family members. With a comparatively low ratio of Detractors (19%), the area's Net Promoter Score reached 32%, exceeding the H2R Industry Norm of 29%.
- Springfield's most popular time for visitation is in the April-September timeframe—40% of visitors (in the past three years) reported visiting in this timeframe.
- The top activities that Springfield's visitors indicated they visited or participated in this year were Shopping (57%), Bass Pro Shops (38%) and Museums/Cultural Events (26%).
- The area's primary functional drivers of visitation are also Shopping (33%) and Bass Pro Shops (30%), followed distantly by Fishing/Boating (14%).



# Springfield, MO FY 2015 Marketing & Media Effectiveness

## Key Performance Indicators

The Springfield CVB's FY 2015 Marketing Campaign generated 110k incremental trips to the Springfield area that would not have occurred had the campaign not been in place.

With a media investment of \$800k for FY 2015, the cost per aware household was just \$0.11—very efficient by travel industry standards. The return on investment was also excellent at \$73—20% higher than the last measurement in FY 2011.

Key Performance Indicator	FY 2015	FY 2011	Variance	H2R Norm*
Aided Awareness	38.7%	39.7%	-1.0%	32.6%
Incremental Visitation	+1.5%	+1.3%	+0.2%	+5.0%
Incremental Trips	110k	106k	+4k	+191K
Incremental Revenue	\$58.7M	\$62.9M	-\$4.2k	\$25.9M
Media Investment	\$800k	\$1.0M	-\$200k	\$376k
Cost/Aware Household	\$0.11	\$0.12	-\$0.01	\$0.44
Return on Investment	\$73	\$61	+\$12	\$76

\*The H2R Industry Norm is derived from destinations across the U.S. with media budgets of less than \$1.0M

# Marketing Efficiency

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

01

## MARKETING EFFICIENCY KPIs



**39%** of travelers have seen or heard a Springfield advertisement



Springfield's FY 2015 marketing campaign reached **7M** households



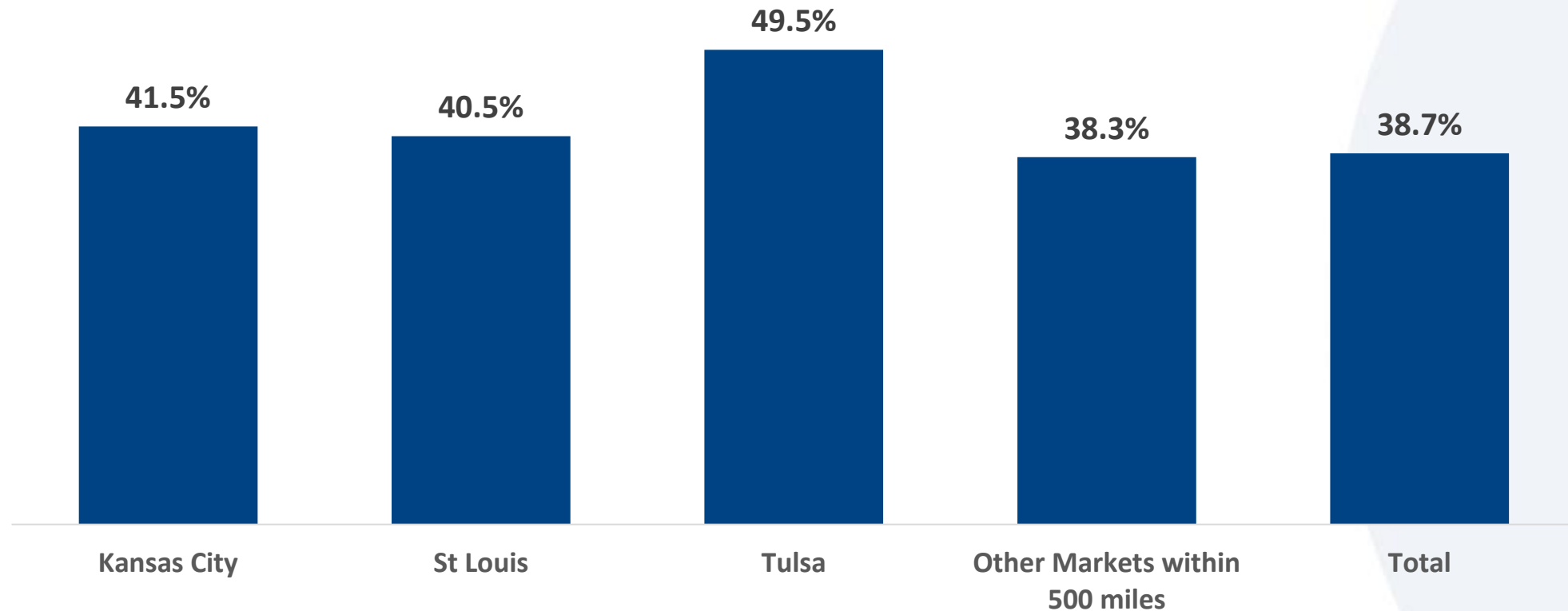
The cost per aware household averaged **\$0.11**



Springfield invested **\$800k** in Leisure Advertising for the FY 2015 Campaign

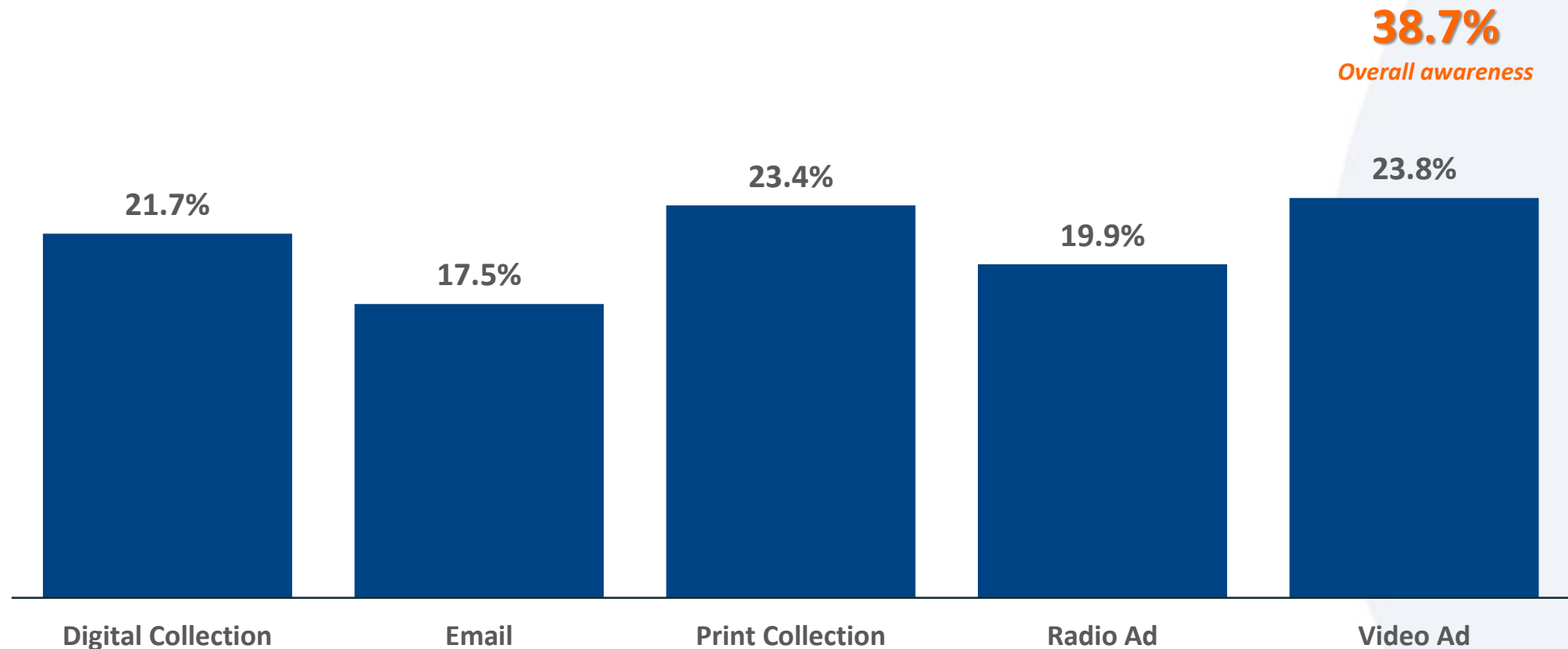
## Overall Marketing & Media Awareness

Overall marketing and media awareness for the FY 2015 campaign reached 38.7%, comparable to the results generated in FY 2011 (39.7%). Also similar to 2011, awareness of advertising was highest in the Tulsa market.



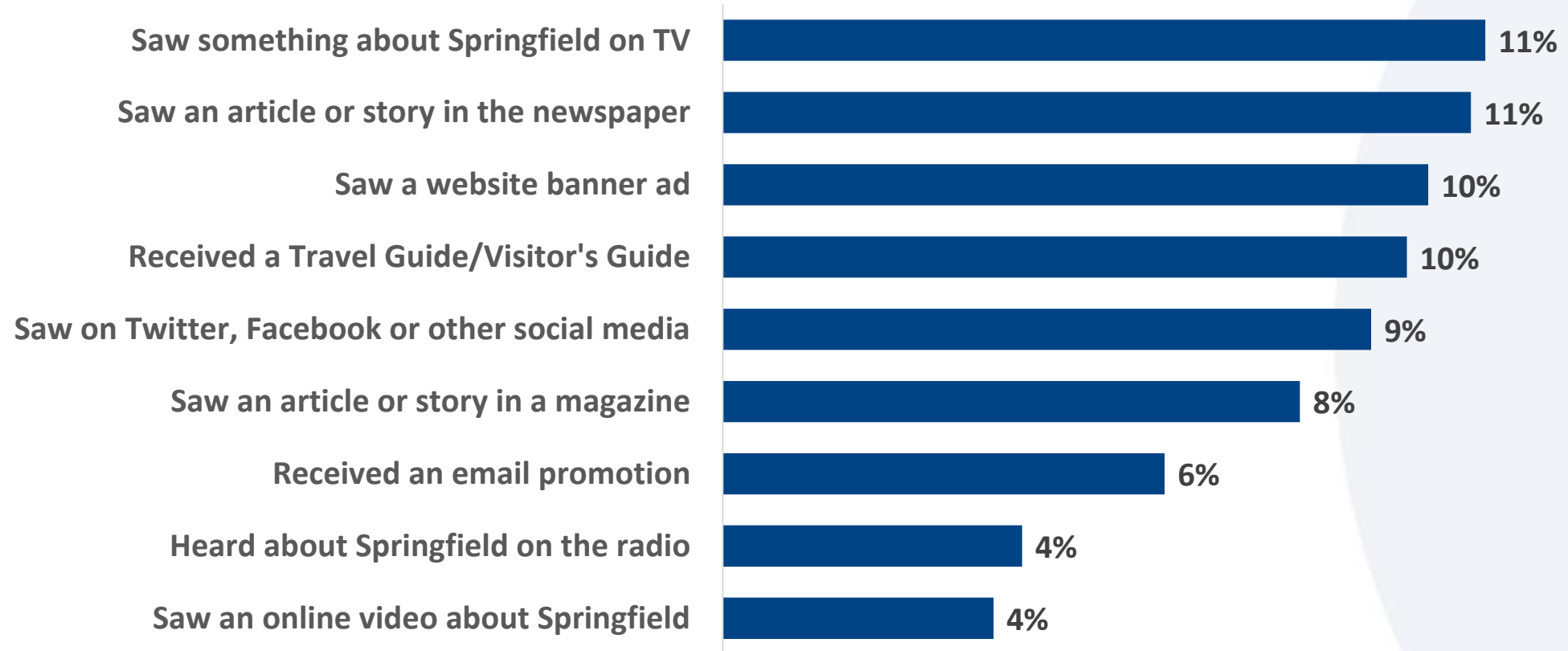
## Awareness by Individual Advertisement/Channel

The Springfield video and print ad collections earned the highest levels of ad awareness, followed closely by the digital ads. It should be noted, however, that the sum of awareness for individual ads is larger than the total awareness because some travelers recall seeing multiple ads/channels.



## Information Saw/Heard about Springfield, MO

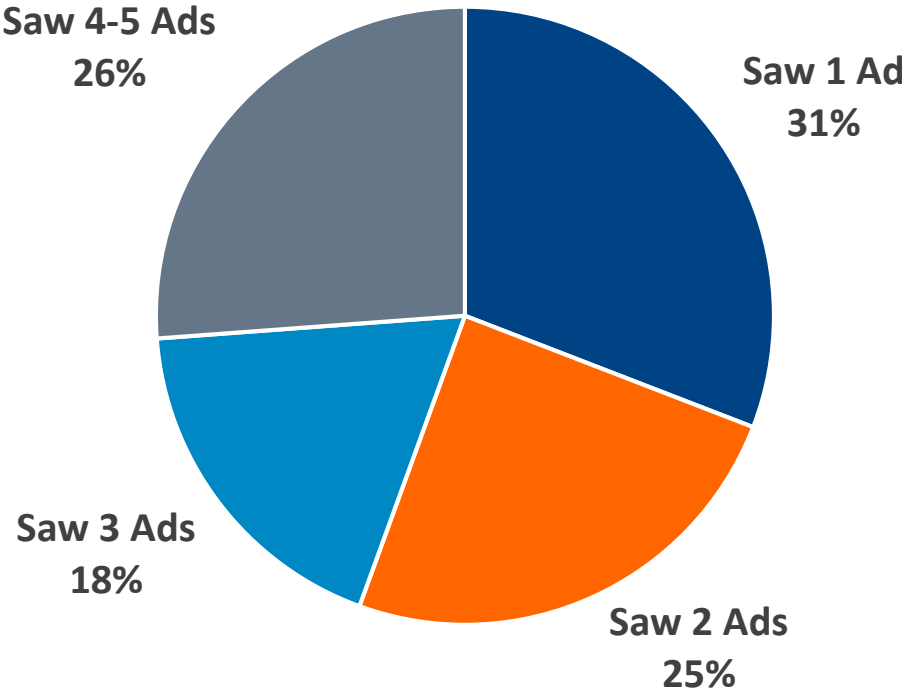
Overall, fewer than half of travelers indicated they saw/heard information about Springfield in the general media (41%). These same travelers were most likely to have seen something on TV, in the newspaper or a website banner ad.



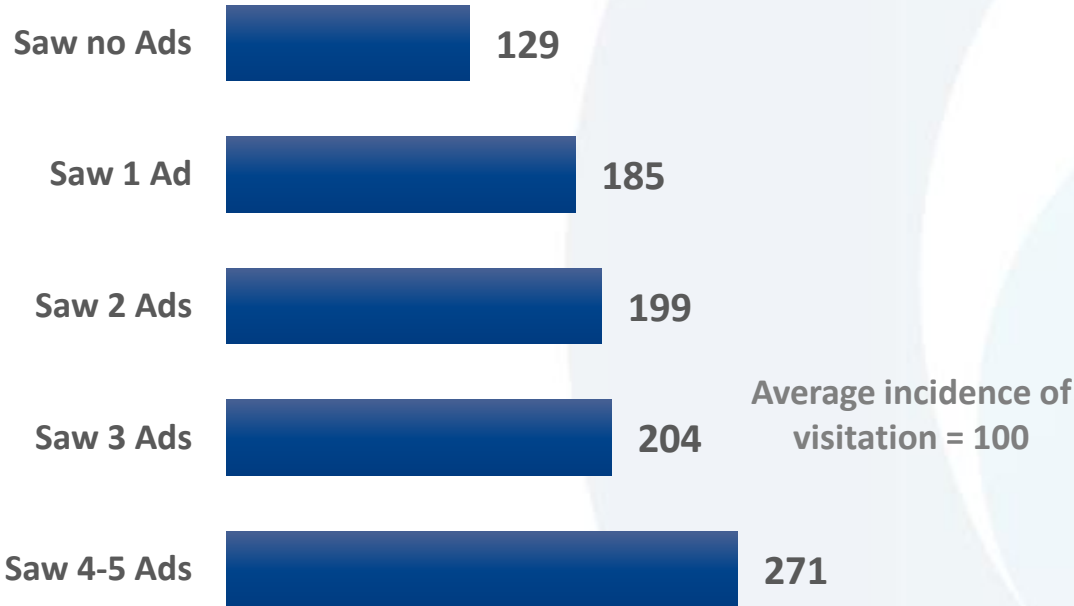
# Media Overlap

Most marketing campaigns perform better when those in the target market can be reached multiple times and/or through multiple channels. This is true for Springfield as, in general, the more ads travelers were exposed to the more likely they were to visit.

Campaign Exposures



Level of Springfield Visitation Indexed



# Market Reach (Aware Traveler Households)

Springfield's FY 2015 Marketing Campaign generated a market reach of 7.1M traveler households, or 38.7% of travelers in these target markets.

The awareness of the campaign was on par with results from 2011 when all target markets were last measured. The Tulsa market generated the highest awareness this year. However, the larger populations in Kansas City and St. Louis yielded greater overall reach.

Market	Total Ad Awareness	Total Market Reach
Kansas City	41.5%	268k
St. Louis	40.5%	353k
Tulsa	49.5%	163k
Other Markets w/in 500 Miles	38.3%	6,389k
<b>Total Market</b>	<b>38.7%</b>	<b>7,173k</b>

# Marketing Efficiency (Cost per Aware Household)

The campaign also efficiently reached travelers in these target markets at a cost of just \$0.11 per aware household.

The Springfield CVB spent \$800,000 on leisure travel marketing in FY 2015. With a market reach of more than 7 million households, the cost per aware household was only \$0.11. This was slightly less than the cost per household in 2011 (\$0.12) and much better than the H2R Industry Norm (\$0.64).

Market	Media Investment	Total Market Reach	GROSS Cost/HH
Kansas City	\$28,573	268k	\$0.11
St. Louis	\$37,971	353k	\$0.11
Tulsa	\$16,410	163k	\$0.10
Other Markets w/in 500 Miles	\$717,044	6,389k	\$0.11
<b>Total Market</b>	<b>\$800,000</b>	<b>7,173k</b>	<b>\$0.11</b>

# Incremental Impact

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- + *Incremental Travel*
- + *Incremental Trips*
- + *Incremental Travel spending*
- + *Return on Investment (ROI)*
- + *Incremental Room Nights*

02

## MARKETING RETURN KPIs



Springfield's FY 2015 Marketing Campaign  
resulted in **110k** incremental trips



**\$59 million** in incremental  
travel spending



Incremental room nights  
totaled **307k**



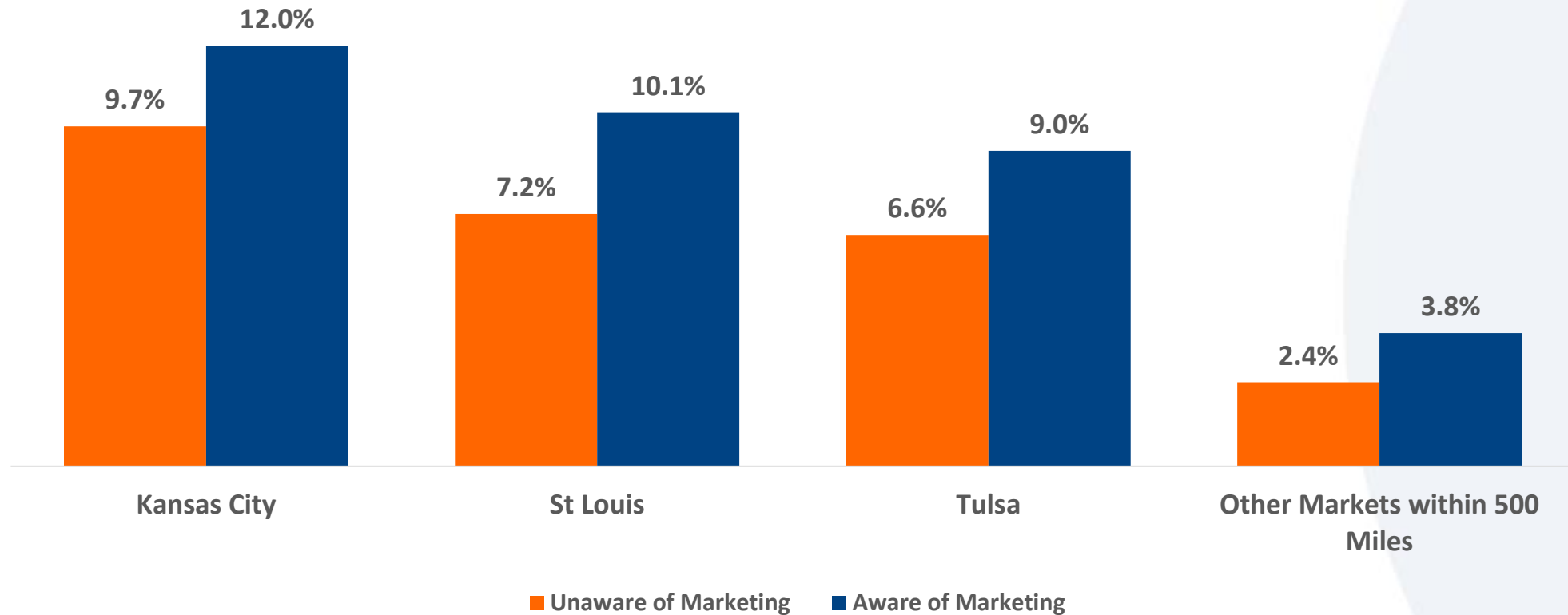
Springfield invested **\$800k** in  
leisure marketing expenditures



**ROI was \$73**

## Visitation to Springfield by Feeder Market

Springfield's FY 2015 Marketing Campaign generated positive incremental visitation in each of the geographic markets evaluated.



# Incremental Visitation

Springfield's most recent campaign generated 110.1k incremental household trips that would not have occurred had it not been for the Springfield CVB's marketing efforts.

Incremental travel from individual markets was strongest in St. Louis, while Tulsa and Kansas City weren't far behind.

Market	Total Market Reach	Incremental Travel	Incremental HH Trips
Kansas City	268k	2.3%	6.2k
St. Louis	353k	2.9%	10.3k
Tulsa	163k	2.5%	4.0k
Other Markets w/in 500 Miles	6,389k	1.4%	89.5k
<b>Total Market</b>	<b>7,173k</b>	<b>1.5%</b>	<b>110.1k</b>

# Incremental Traveler Spending

Springfield's 110k incremental trips generated \$58.7M in travel spending that would not have occurred had it not been for the marketing campaign.

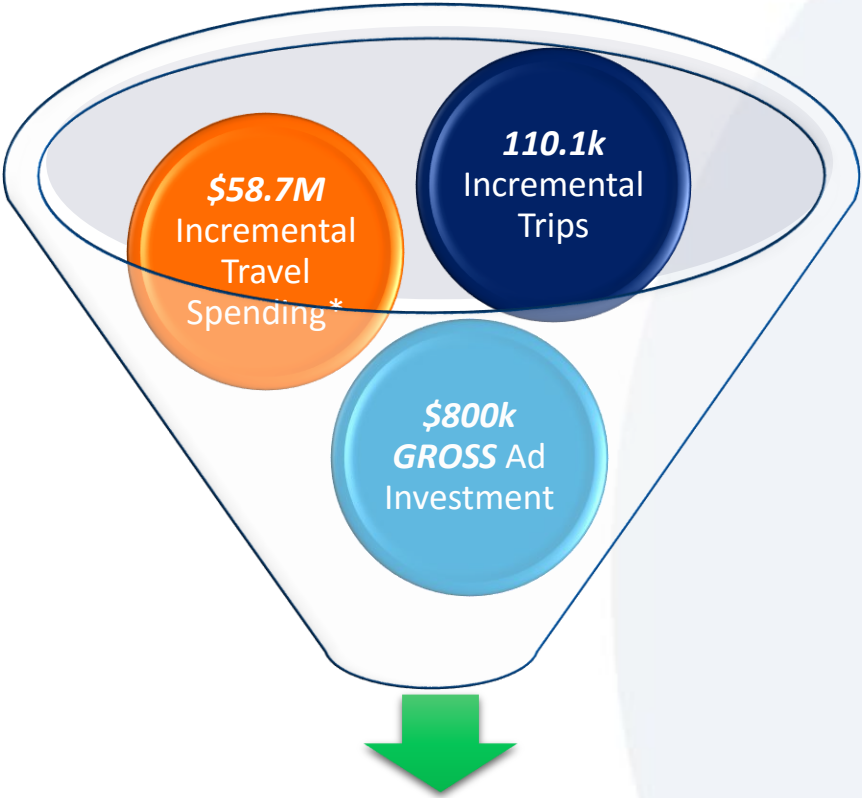
Springfield visitors spent an average of \$533 per party on their most recent visit, with travelers from Tulsa spending the most.

Market	Incremental HH Trips	Travel Spending per Party	Incremental Spending
Kansas City	6.2k	\$478	\$3.0M
St. Louis	10.3k	\$602	\$6.2M
Tulsa	4.0k	\$704	\$2.8M
Other Markets w/in 500 Miles	89.5k	\$522	\$46.7M
<b>Total Market</b>	<b>110.1k</b>	<b>\$533</b>	<b>\$58.7M</b>

Springfield’s FY 2015 Campaign generated an ROI of \$73 for every dollar invested.



**Party Trip Spending**  
\$533  
*2011: \$591*



**\$73 Return on Investment**  
*\$61 ROI in FY 2011*

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

## Incremental Room Nights/Units Across Region



307k

Incremental Room  
Nights/ Units Across All  
Lodging Categories  
Throughout Southwest  
Missouri

The FY 2015 Marketing Campaign generated more than 300k incremental *room nights* from those staying overnight in Southwest Missouri (67% spent the night in Springfield) at a Hotel/Motel, Bed & Breakfast, Condo, Cabin, Cottage, Airbnb, Timeshare, Campground or Resort.

Extrapolated across the number of rooms purchased and length of stay, it is estimated that the marketing campaign generated nearly 17% of the total room nights utilized by travelers in Springfield during this period.

# Incremental Hotel Room Nights in Springfield



The FY 2015 Marketing Campaign generated more than 100k incremental hotel/motel *room nights* from all travelers staying overnight in Springfield, Missouri.

This figure excludes all overnight stays spent outside of Springfield as well as those spent with friends & family, Bed & Breakfasts, Condos, Cabins/Cottages, Airbnb, Timeshare, Campgrounds or Resorts.

Incremental room nights account for approximately 8% of the 1.26 million total room nights projected by Springfield's Occupancy Report\*.

See Appendix for full detail.

\*Springfield Occupancy Reports show a total room demand of 1.22 million in 2014, and this year is running up 3.0% YTD through October. If the increase holds, 2015 room demand will be 1.26 million.

# Advertising Evaluation

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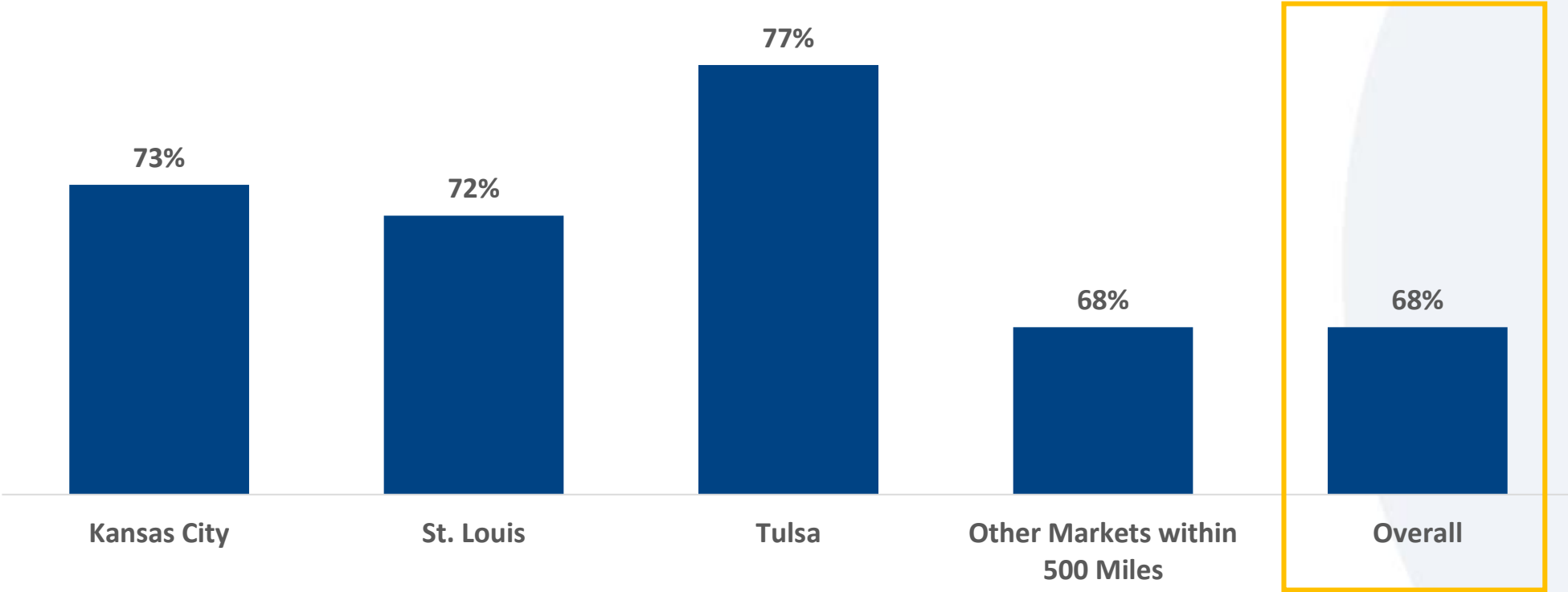
- + *Impact on Appeal*
- + *Relevance, Brand Fit & Differentiation*
- + *Impact on Consumer Behavior*
- + *Marketing Messages' Impact on Intent to Visit*

03

# Impact on Appeal of Springfield

More than 7 in 10 travelers (68%) indicated the ads made Springfield seem more appealing, higher than the H2R Industry Norm of 63%.

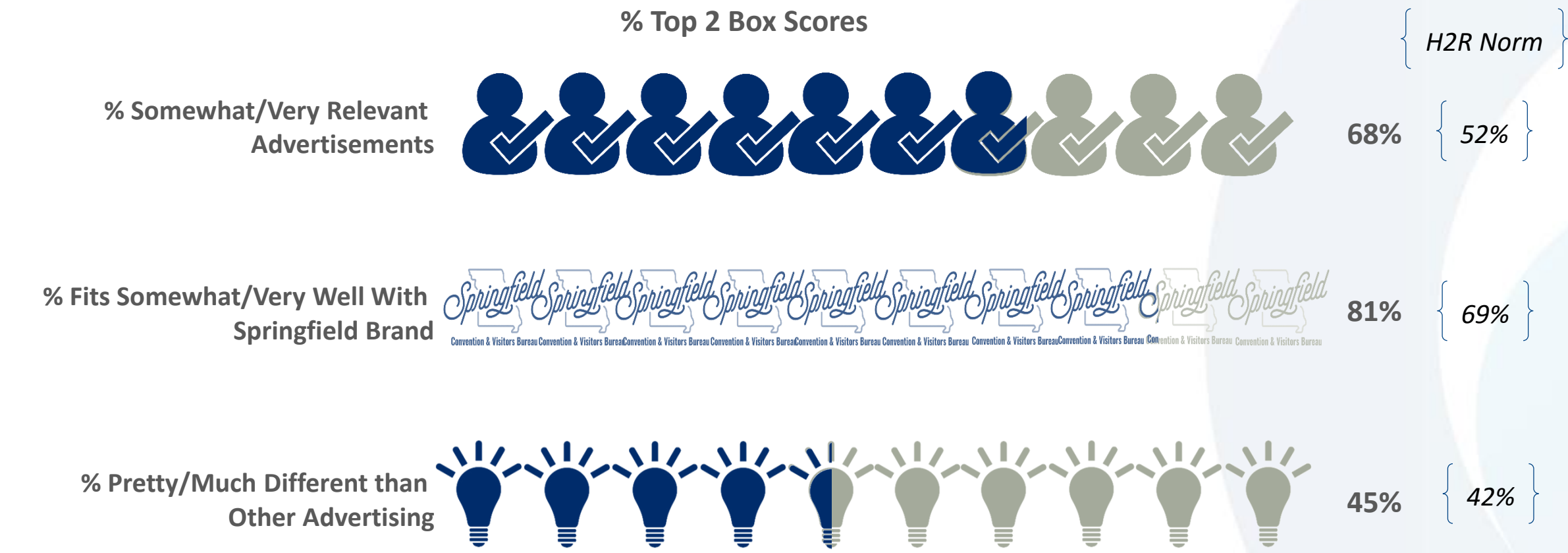
% Top 2 Box – Makes Springfield Seem A Little/Much More Appealing



Q27: Using the scale provided, please indicate the degree to which these ads make Springfield seem more appealing to you:

# Relevance, Brand Fit and Differentiation

The ad campaign fit the Springfield brand well and was considered relevant to travelers’ needs. It also performed comparatively well for being differentiated from other destinations’ advertising. All metrics exceed H2R Industry Norms.



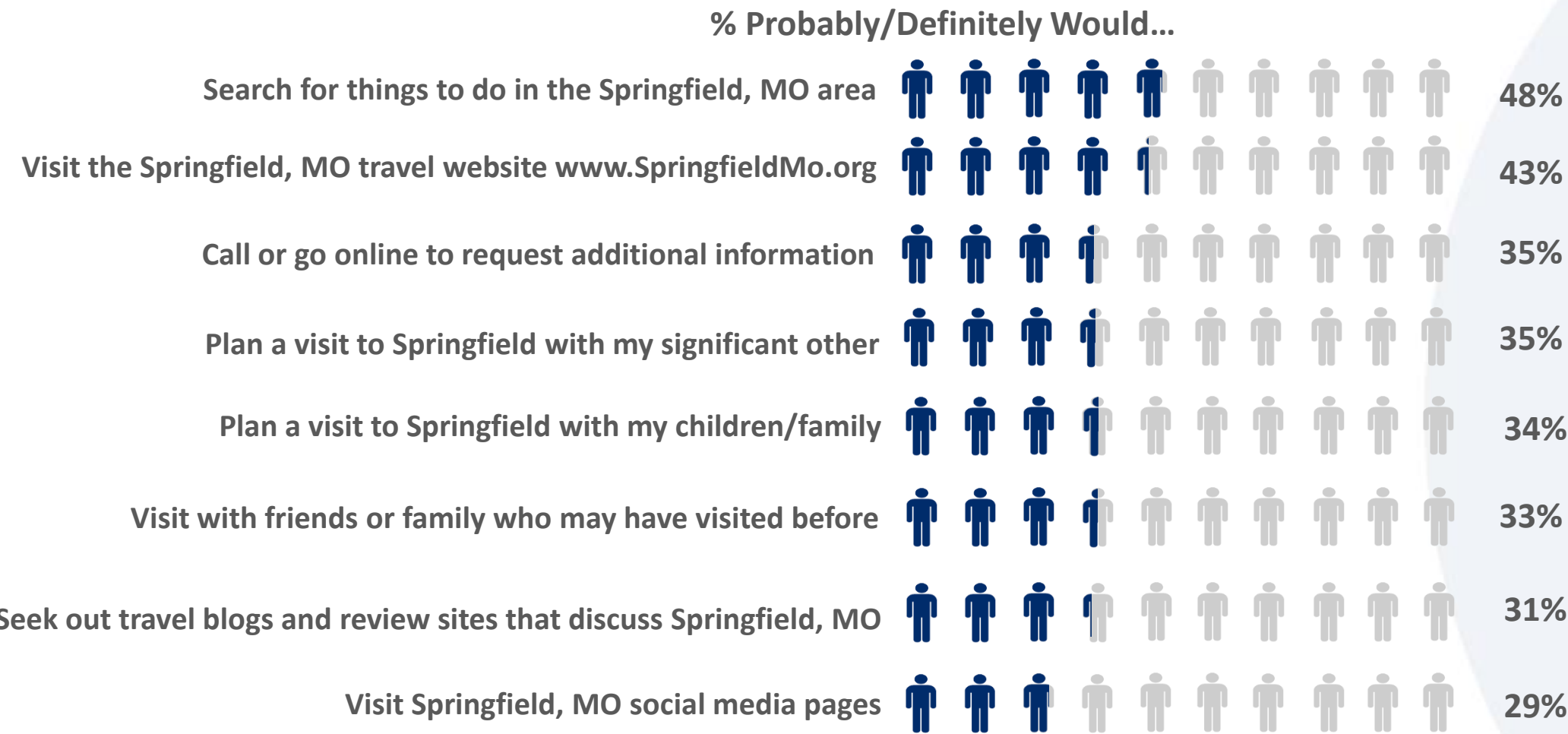
# Traveler Takeaways from the Advertising Message

The primary messages travelers took away from the ad campaign were that Springfield has a variety of things to see and do and is surrounded by natural, scenic beauty.



# Post-Ad Exposure Traveler Intentions

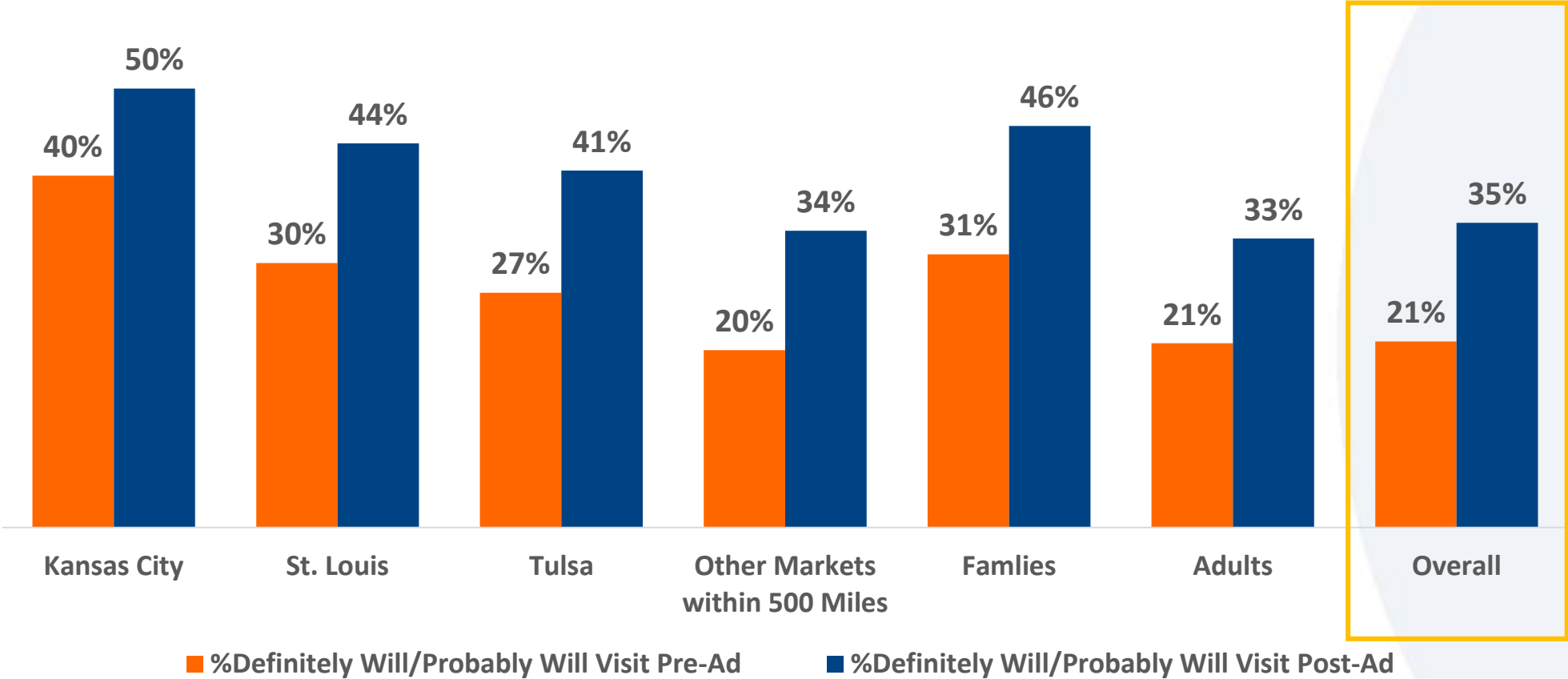
The advertising collection enticed travelers in the target market to search for things to do in the area and to visit the Springfield travel website for more information.



Q32: After reviewing these ads, how likely would you be to take each of the following actions?

# Intent to Visit Springfield– Pre- and Post-Ad Exposure

Springfield’s advertising campaign generated a lift in intent to visit of nearly 14% overall. Visitors from Tulsa (+14%) and Families with Children (+15%) were most (positively) impacted by the advertising campaign. This post-ad awareness lift is quite strong compared to the H2R Industry Norm (+7%).



Q7: Using the scale provided, please indicate how likely you are to visit each of the following destinations in the next 12 months:  
Q33: 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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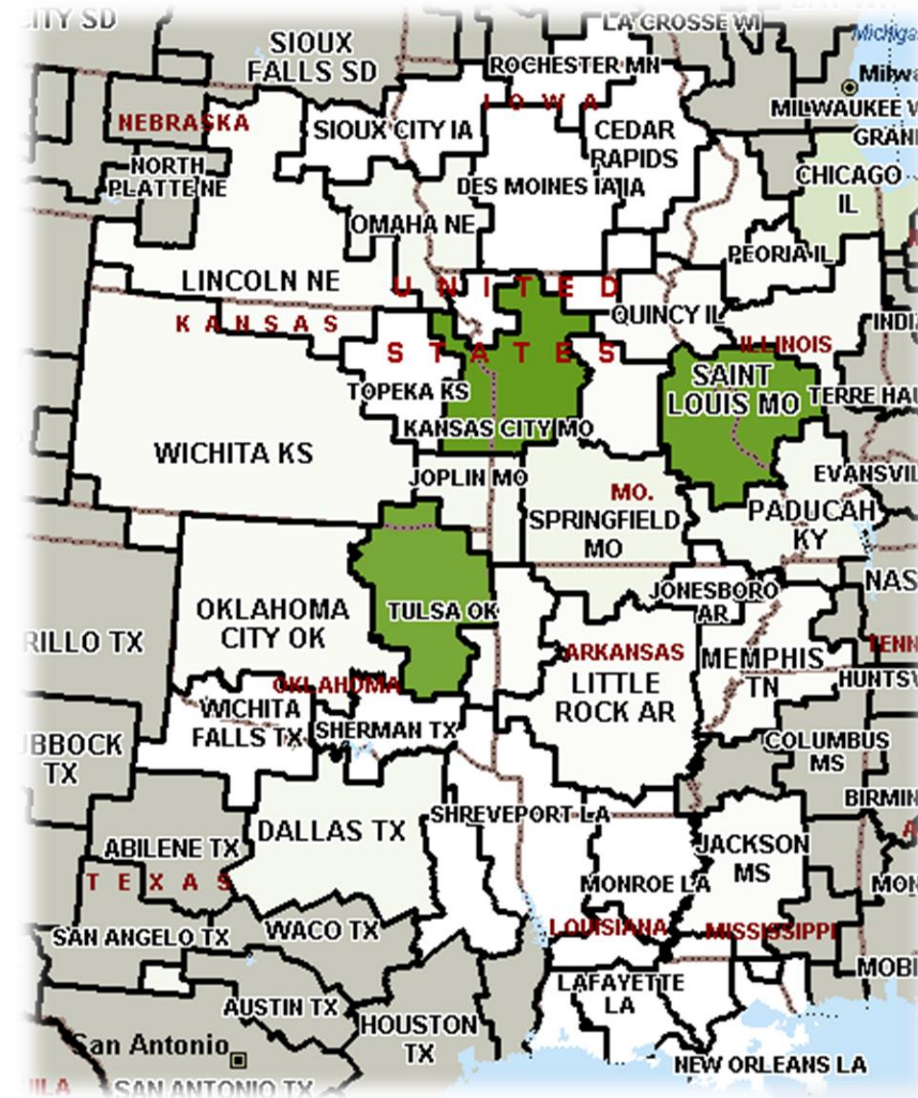
- + *Top of Mind Destinations*
- + *Past Destination Visitation*
- + *Future Intent to Visit Destinations*
- + *Seasonality & Frequency of Visitation*
- + *Activity Participation & Functional Drivers*
- + *Overnight Visitation*
- + *NPS & WoMI*
- + *Demographic Categorization*

04

# Springfield Visitation

Springfield enjoys visitation from many areas within 500 miles of the area.

Specifically, the Kansas City, Tulsa and St. Louis areas generate quite a bit of visitation, followed by Chicago and right here in Springfield as well.



# Top of Mind Awareness

As might be expected for non-resort area destinations and smaller cities, Springfield did not rank particularly high among travelers' primary consideration set (e.g., Branson, Chicago, St. Louis, Kansas City, etc.).



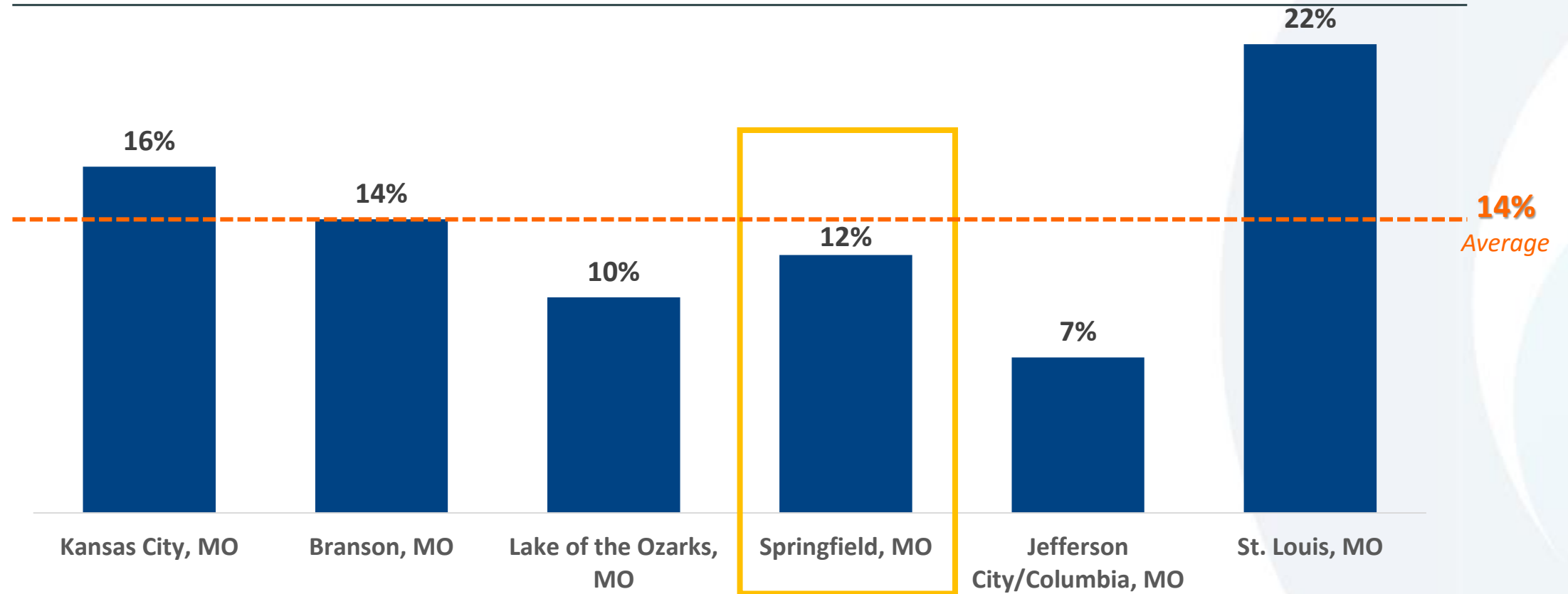
### Any Mention of Destinations

Rank	Destination	Awareness
1	Branson, MO	7.3%
2	Chicago, IL	6.2%
3	St. Louis, MO	4.9%
4	Kansas City, MO	4.2%
5	Dallas, TX	2.9%
...58	Springfield, MO	0.2%

Q4: When you think of cities in your region you would enjoy visiting for leisure, which destinations first come to mind?

## Destinations Visited in the Past 3 Years

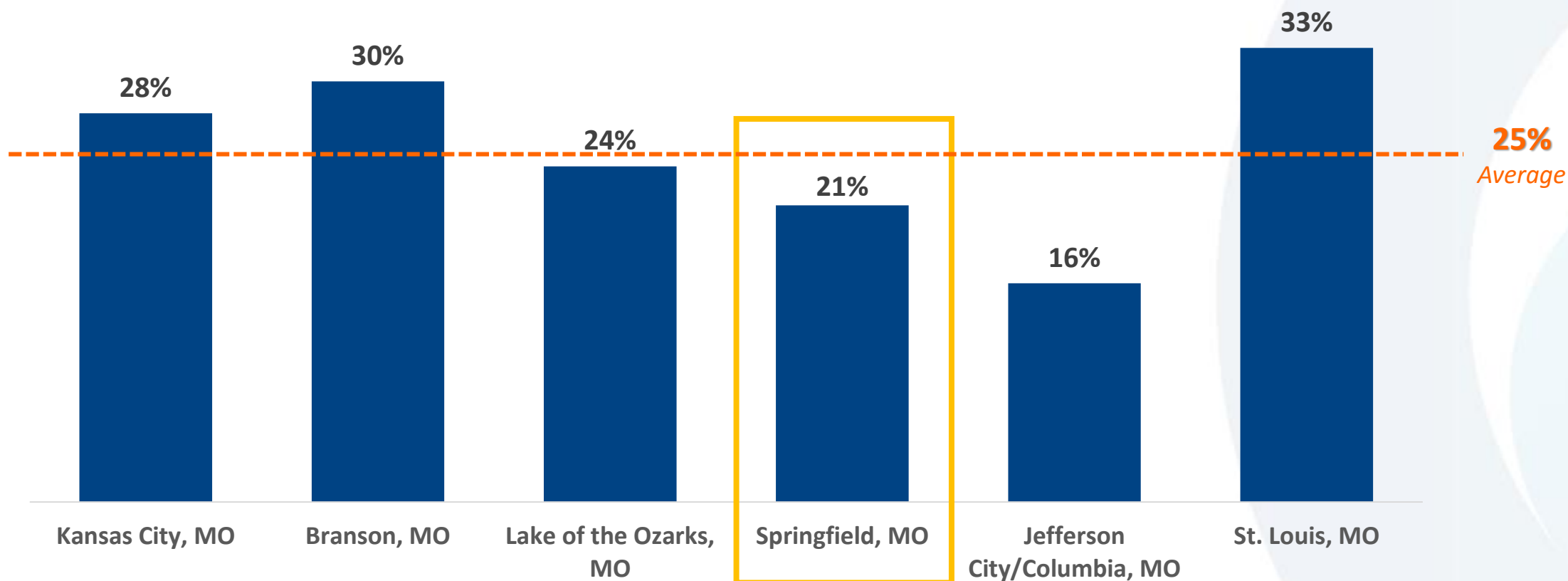
Just over 10% of travelers in the target markets have visited Springfield in the past 3 years— on par with Lake of the Ozarks and Branson visitation, and just below average for the competitive set (in this 0-500 mile geographic region).



Q5: Please indicate which of these destinations, if any, you have visited in the past 3 years:

## Intent to Visit (Pre-Exposure)

More than 1 in 5 travelers indicated they are likely to visit Springfield in the next 12 months. While lower than the average intent to visit for the competitive set, it is important to recognize that intent jumps to 35% after seeing the ads. Hence, greater ad awareness would appear to deliver higher levels of intent to visit.

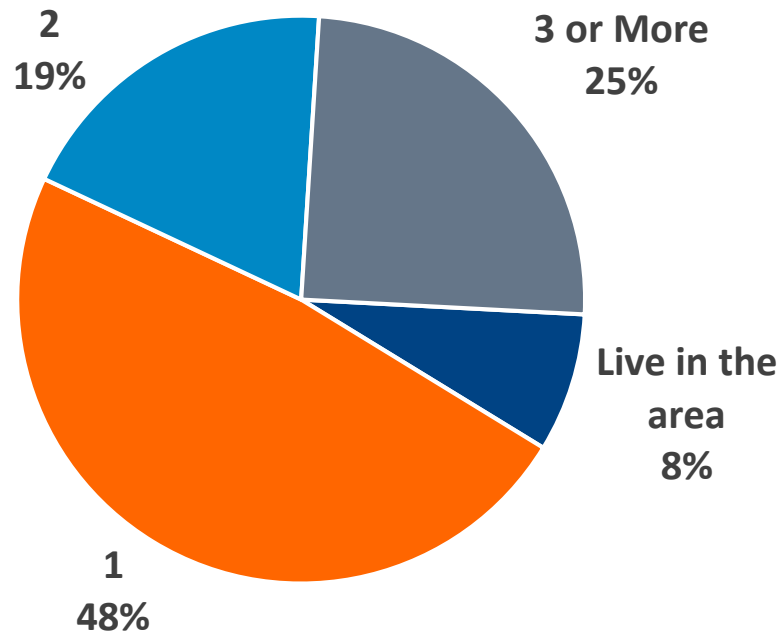


Q5: Please indicate how likely you are to visit each of the following destinations in the next 12 months:

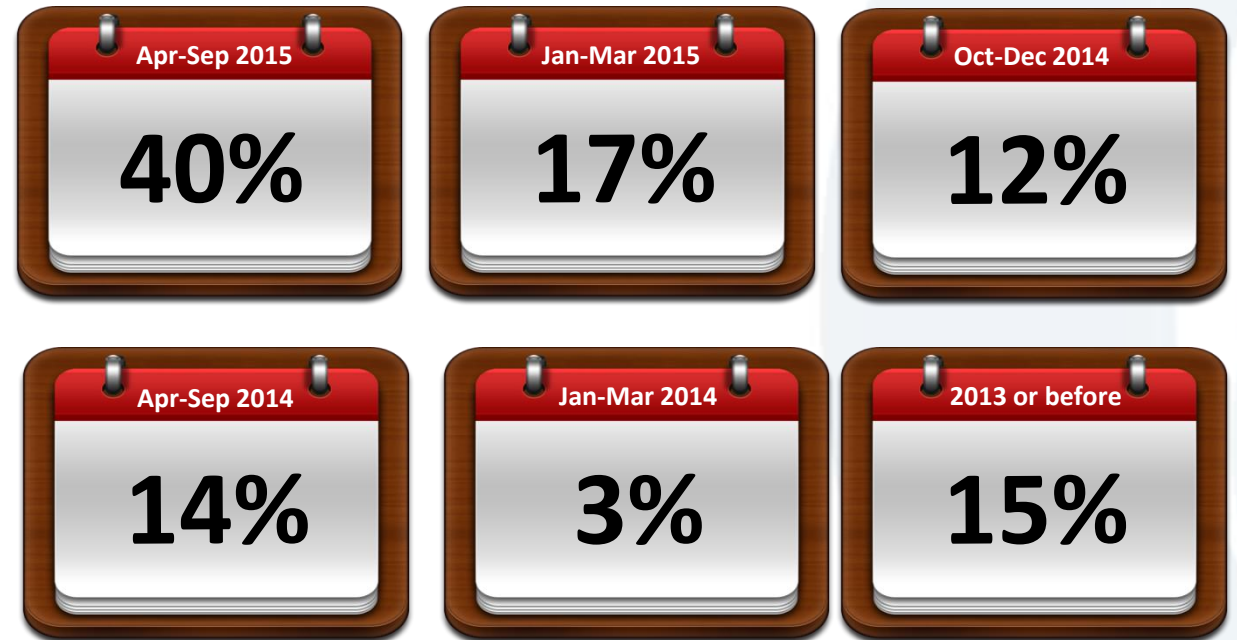
# Seasonality & Frequency of Visitation

Most travelers who have visited Springfield in the past 3 years have done so in the past 6 months. And, those who visited in 2015 reported making an average of 2 trips to the area.

Number of Trips in Past 12 Months – 2.1

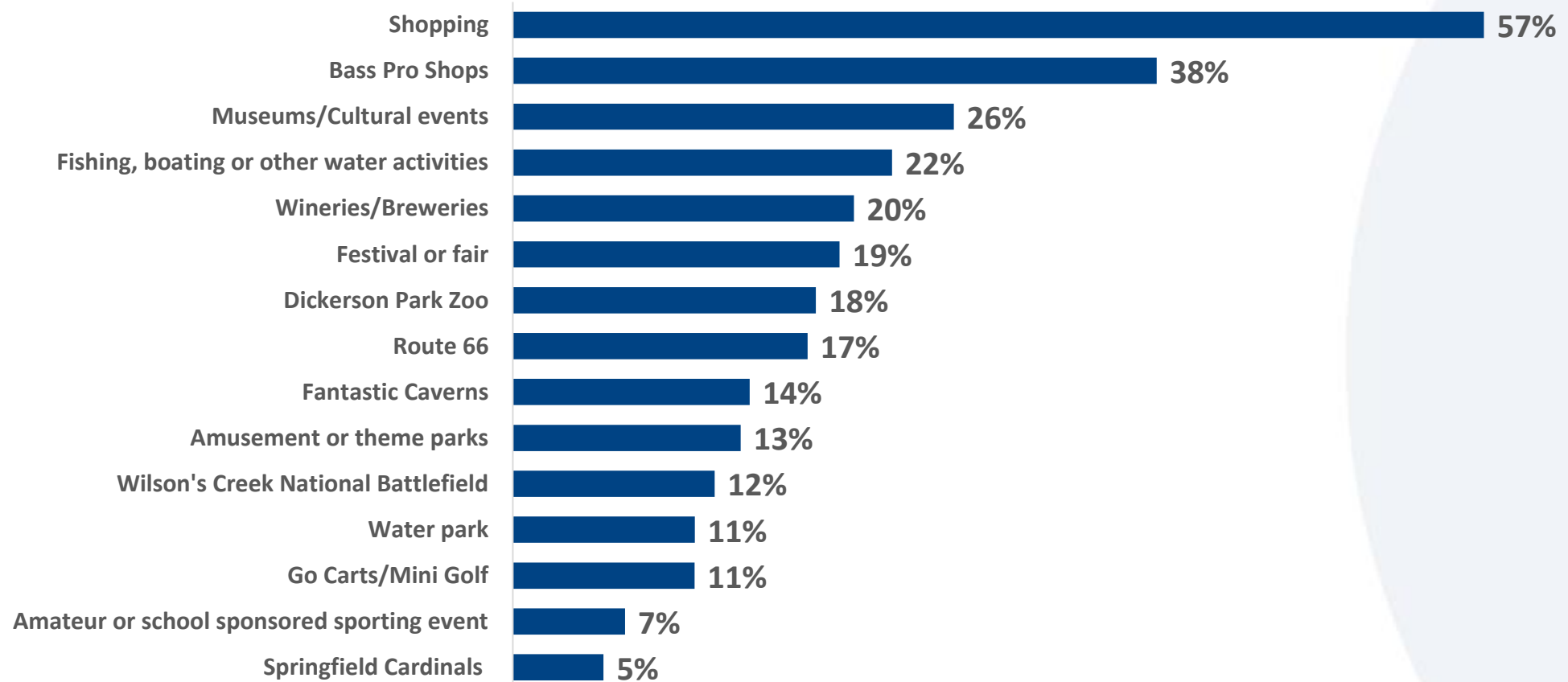


Most Recent Visit to Springfield, MO



## Area Activity Participation

Springfield visitors are most likely to Shop, visit Bass Pro Shops and/or visit Museum/Cultural Events when visiting the area.



Q10: Which of the following activities or experiences, if any, did you participate in on your most recent visit to Springfield, MO?

## Functional Drivers of Visitation

Although, not necessarily the top activities participated in, Shopping, Bass Pro Shops and Fishing/Boating are the top drivers of visitation to the area.



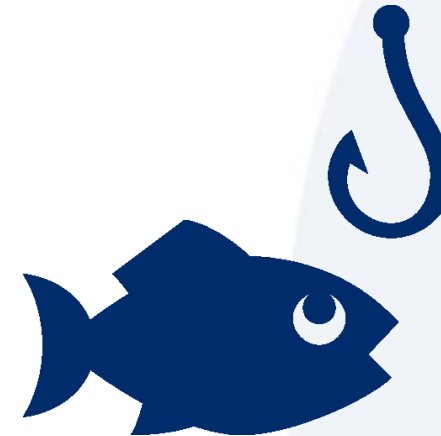
Shopping

**33%**



Bass Pro Shops

**30%**

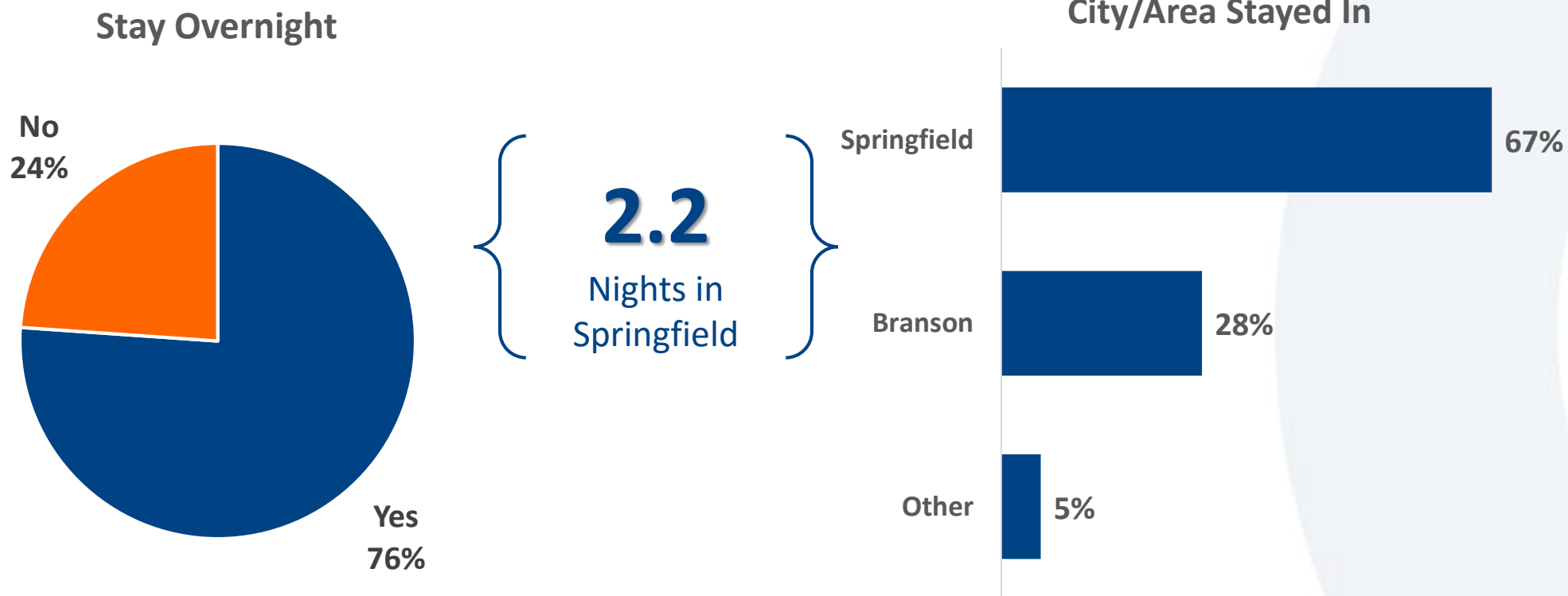


Fishing/Boating

**14%**

# Overnight Visitors

More than three-quarters (76%) of Springfield's visitors spent the night on their most recent visit, and overnight visitors reported staying for an average of 2.2 nights (across all lodging categories when staying in Springfield). More than two-thirds stayed in Springfield while the remainder stayed in Branson or other surrounding communities.



RESPONDENT BASE: SPRINGFIELD VISITORS LAST 3 YEARS | N=261

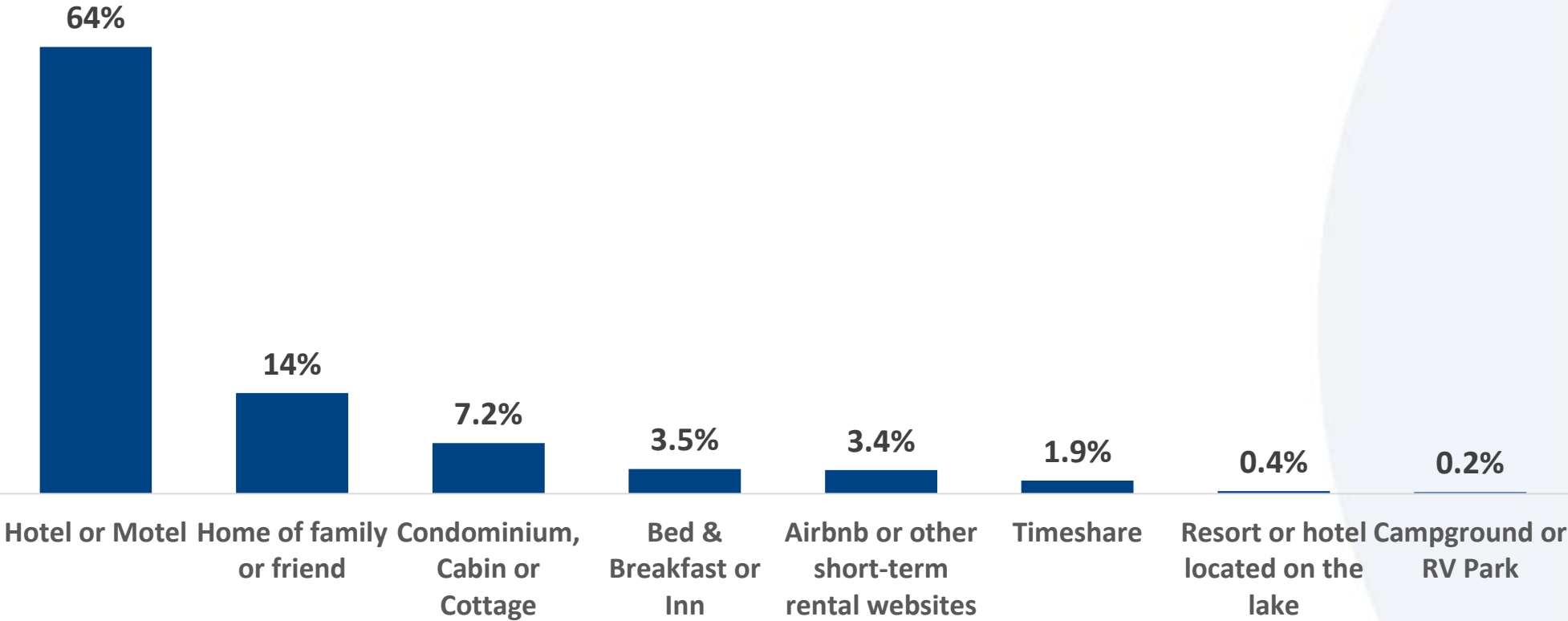
RESPONDENT BASE: ALL OVERNIGHT VISITORS | N=205

Q15: How many nights did you spend in the area on this trip?

Q16: In which of the following cities/areas did you spend the night on your most recent visit to the Springfield area?

# Accommodations Used

Hotels/Motels are the most popular accommodations used by overnight visitors, followed by staying with friends/family.



Q17: Which of the following best describes the type of accommodations you used on your most recent trip?

# Word of Mouth Index (WoMI)

The Word of Mouth Index takes the Net Promoter Score (see appendix) a step further by augmenting the “how likely are you to recommend?” approach with a second question: “How likely are you to discourage others from visiting this destination?” The WoMI then subtracts the percentage of 9 and 10 ratings from “likelihood to discourage” from the percentage of 9 and 10 ratings from “likelihood to recommend” to arrive at the balanced and accurate WoMI score.

“How likely are you to recommend Springfield to a friend or family member?”

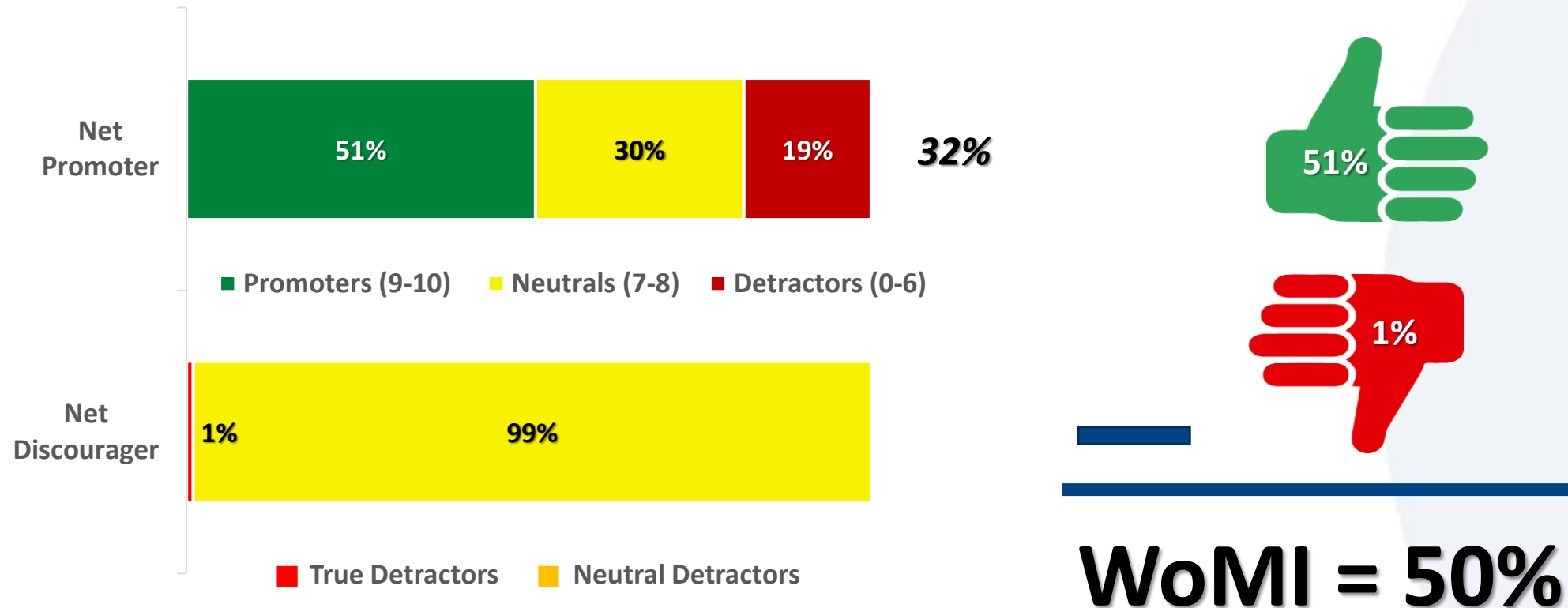


“How likely are you to discourage friends and family from visiting Springfield, MO?”



# Net Promoter Score & WoMI

Springfield has a respectable Net Promoter Score (32%) among recent visitors, higher than the H2R Industry Norm of 29% for destinations. More importantly, only 1% of Detractors would consider actively discouraging others from visiting, providing for a WoMI of 50%.



Q18: How likely are you to recommend Springfield to a friend or family member?

Q20: Using the scale provided, please indicate how likely you would be to discourage others from visiting Springfield?

# Leveraging Brand Promoters

- Brand Promoters can offer considerable opportunity for travel destinations like Springfield. Not only do such recommendations provide greater credibility than paid marketing channels, but by organically promoting the destination among their friends, families and followers these kinds of viral recommendations can help Springfield reach new audiences it might not otherwise touch.
- According to Stan Phelps\* Brand Promoters are worth 4X the lifetime value of travelers generated through other means because they are not only likely to visit again, but are also more likely to go on and persuade others to visit as well. Providing Brand Promoters with key information about Springfield helps promote the area by leveraging their ambassadorship.



## Demographic Profile of Springfield Visitors

Springfield Brand Advocates are slightly older, more likely to have children and have a higher household income than recent visitors. Prospective visitors are much younger, however, and are the most likely to have children in their home.

	Visitors in Past 12 Months	Non-Visitors	Prospects*	Brand Advocates**
Respondent Age	41	42	37	43
Children in the Home	51%	49%	61%	58%
No Children	49%	51%	39%	42%
Males	27%	28%	31%	26%
Females	73%	72%	69%	74%
HH Income	\$68.7k	\$60.9k	\$56.3k	\$69.2k
Distance	184 miles	329 miles	317 miles	183 miles
% College Graduate +	49%	43%	34%	47%

\*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 present a good target for the Springfield CVB. On average, they have a much higher intent to visit the area after being exposed to the ads, have a slightly higher household income than adult travelers.

	Families (Children at Home)	Adults (No Children)	Variance
Respondent Age	36	49	-13
Children in the Home	100%	0%	+100%
No Children	0%	100%	-100%
Males	21%	31%	-10%
Females	79%	69%	+10%
HH Income	\$63.9k	\$63.5k	+\$0.4k
Distance	270 miles	284 miles	-14 miles
% College Graduate +	46%	45%	+1%
Intent to Visit Springfield, MO	46%	33%	+13%

# Appendix

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+ *Net Promoter Score Explanation*

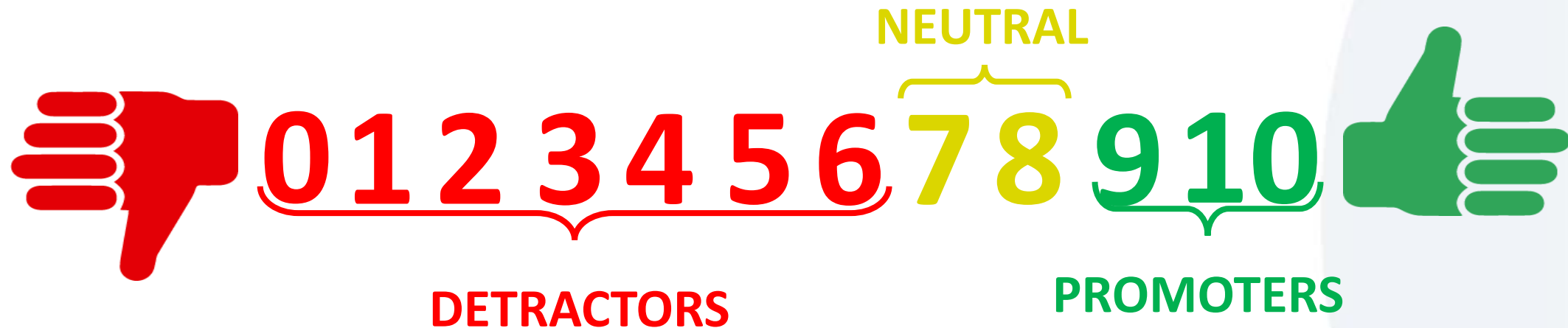
+ *Incremental Hotel Room Nights Calculation*

05

## Net Promoter Score

NPS (Net Promoter Score) is a leading measurement tool used by thousands of organizations across industries. Given the importance of positive word of mouth advertising, it is mission critical that travel destinations measure their brand advocacy using a metric like the Net Promoter Score.

**“How likely are you to recommend Springfield to a friend or family member?”**



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

## Incremental Hotel Room Nights Spent in Springfield, MO

	Incremental Visits
Total Incremental Stays Across SW MO	110,056
% Spending Night in SW MO During Stay	76%
Incremental Overnight Stays in SW MO	83,700
% Spending Night in Springfield, MO	67%
Incremental Overnight Stays in Springfield	56,300
% Staying at Hotels/Motels in Springfield	70%
Incremental Hotel/Motel Visitors	39,700
No. of Rooms/Units Used by Spfd Visitor Parties	1.24
Incremental Hotel/Motel Rooms Used	49,000
Length of Stay/Nights in Springfield	2.16
<b><i>Incremental Room Nights/Room Demand</i></b>	<b><i>105,900</i></b>

The 110k incremental stays the Springfield CVB generated for Southwest Missouri resulted in more than 100k incremental room nights for the Springfield lodging community.

This figure represents about 8% of Springfield's total projected room nights reported in the Occupancy Report.

# Thank You!



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## **H2R MARKET RESEARCH**

*Reveal Your Customer's Full Experience*