

Table Rock Lake 2023 Marketing & Media Effectiveness

Prepared for Table Rock Lake

Delivered November 2023



THE CLOSEST TO THE CUSTOMER WINS.



Tourism is Stone County's #1 industry.

Every single business in this region is affected by how many visitors choose the Table Rock Lake area as a vacation destination.

Project Overview

Purpose. The purpose of this study was to measure the efficiency, effectiveness and incremental impact the 2023 Table Rock Lake (TRL) tourism marketing campaign had on the community's visitation and travel spending, as well as to calculate the campaign's return on investment (ROI).

This research was conducted in September 2023 and measured visitation from July 2022 through June 2023, allowing travelers time to complete their visits and enabling the research to capture all relevant travel and spending generated as a result of the campaign.

Target Audience. Qualified participants were travelers living within 50-300 miles of Table Rock Lake commensurate with where the organization's marketing was targeted. H2R Market Research (H2R) surveyed participants via an online survey using a professionally managed online market research panel where individuals were screened to ensure they were adult travelers who were household decision makers.

Sample. A total of 1,200 respondents were interviewed for this study. This sample size provides for a maximum margin of error of +/-2.8% at a 95% confidence interval overall.

Participants are asked open ended questions. With many of the questions they'll also be shown ads from the marketing campaigns being evaluated.

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Spring into action! Grab the kids and go to Table Rock Lake, Missouri. #ThatsMyMO



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As listed in Travellersworldwide.com's
 14 Best Lakes in the U.S. in 2022


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6.5 MILLION LIGHTS...

even more memories on the making



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Channels

META/Instagram

Google Display

Google Video

TripAdvisor

Native

OTT/Connected TV

Message/Ad Sets

Summer Fishing

Fall/Winter Fishing

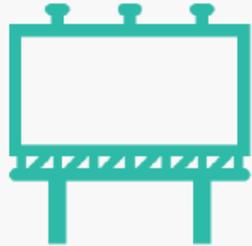
General Lake (Relax, Families,
Watersports)

Silver Dollar City Summer

Silver Dollar City Christmas

The impact of 2023 Marketing

MARKETING EFFICIENCY



53.5%

of travelers recall seeing/hearing a Table Rock Lake advertisement shown to them



2.74M

travel households were reached by Table Rock Lake's ad campaign as a direct result of their ad awareness



\$214.9k

was invested in marketing by the Table Rock CVB to reach the target market



\$0.08

was invested to reach each aware travel household across the target market

Table Rock Lake 2023 Campaign Key Performance Indicators (KPI) Summary

Table Rock Lake's gross return on investment maintained its strong level of return in 2023 as digital usage continues to increase.

Destination marketing awareness and incremental travel revenue driven by the TRL 2023 campaign remain well above normative levels.

In total, the 2023 campaign reached 2.74 million travel households and generated 54.8k incremental trips which translated to \$59.2M in incremental revenue for TRL that would not have materialized otherwise.

The 2023 campaign's net investment was higher than a year ago leading to a slightly lower net ROI (which still exceeds most other DMOs), while gross investment was slightly lower which helped maintain a gross ROI level slightly higher than in 2022.

Key Performance Indicator	2023 50-300 mi.	2022 50-300 mi.	TRL Historical Average ¹ 50-300 mi.	TRL Historical Average ¹ Overall	H2R Norm ²
Paid Media Awareness	53.5%	50.1%	43.7%	45.4%	35.9%
Aware Households	2.74M	2.49M	2.03M	2.51M	1.92M
Incremental Visitation	+2.0%	+2.6%	+2.6%	+2.6%	+1.9%
Incremental Trips	+54.8k	+65.7k	+51.4k	+64.9k	+29.1k
Incremental Revenue	+\$59.2M	+\$63.6M	+\$49.7M	\$63.0M	+\$16.1M
Net Media Investment ³	\$192.0k	\$156.1k	\$104.7k	\$303.5k	\$125.7k
Net Cost/Aware Household	\$0.07	\$0.06	\$0.05	\$0.12	\$0.13
Net Return on Investment	\$308	\$408	\$542	\$235	\$138
Gross Media Investment ³	\$214.9k	\$232k	\$136.7k	\$338.8k	\$144.7k
Gross Cost/Aware Household	\$0.08	\$0.09	\$0.06	\$0.14	\$0.11
Gross Return on Investment	\$275	\$274	\$409	\$199	\$118

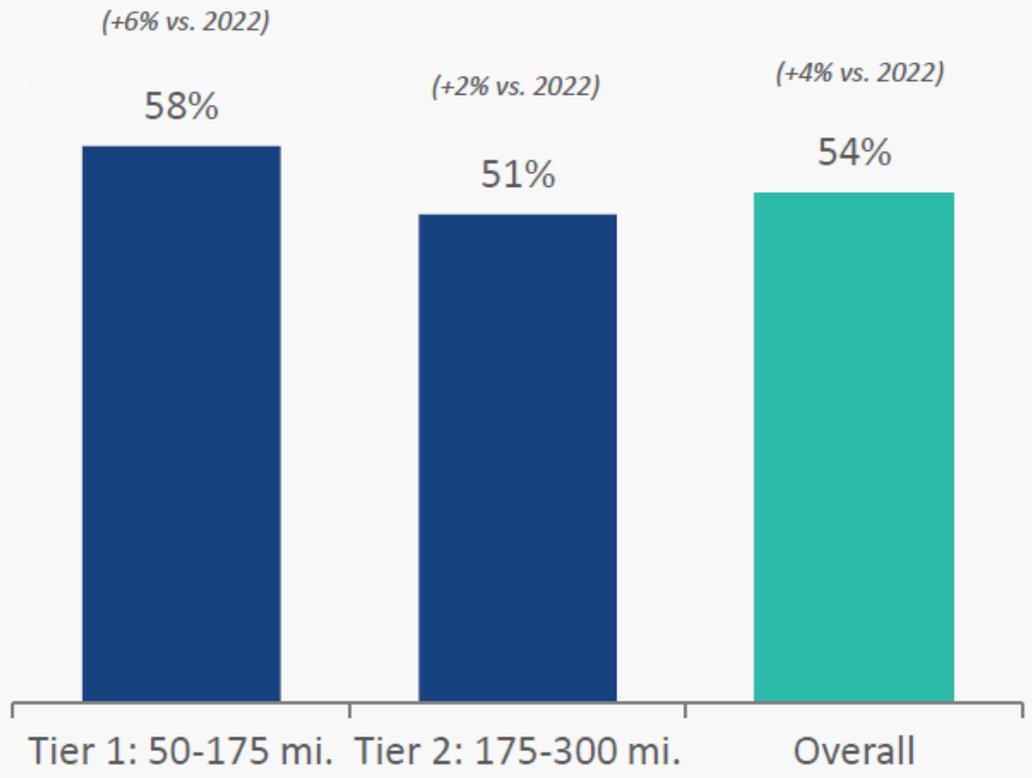
¹The Table Rock Lake Historical Average is generated from Marketing & Media Effectiveness Studies conducted since 2016.

²The H2R Proprietary Industry Norm (H2R Norm) is generated from destinations with a budget of <\$250k.

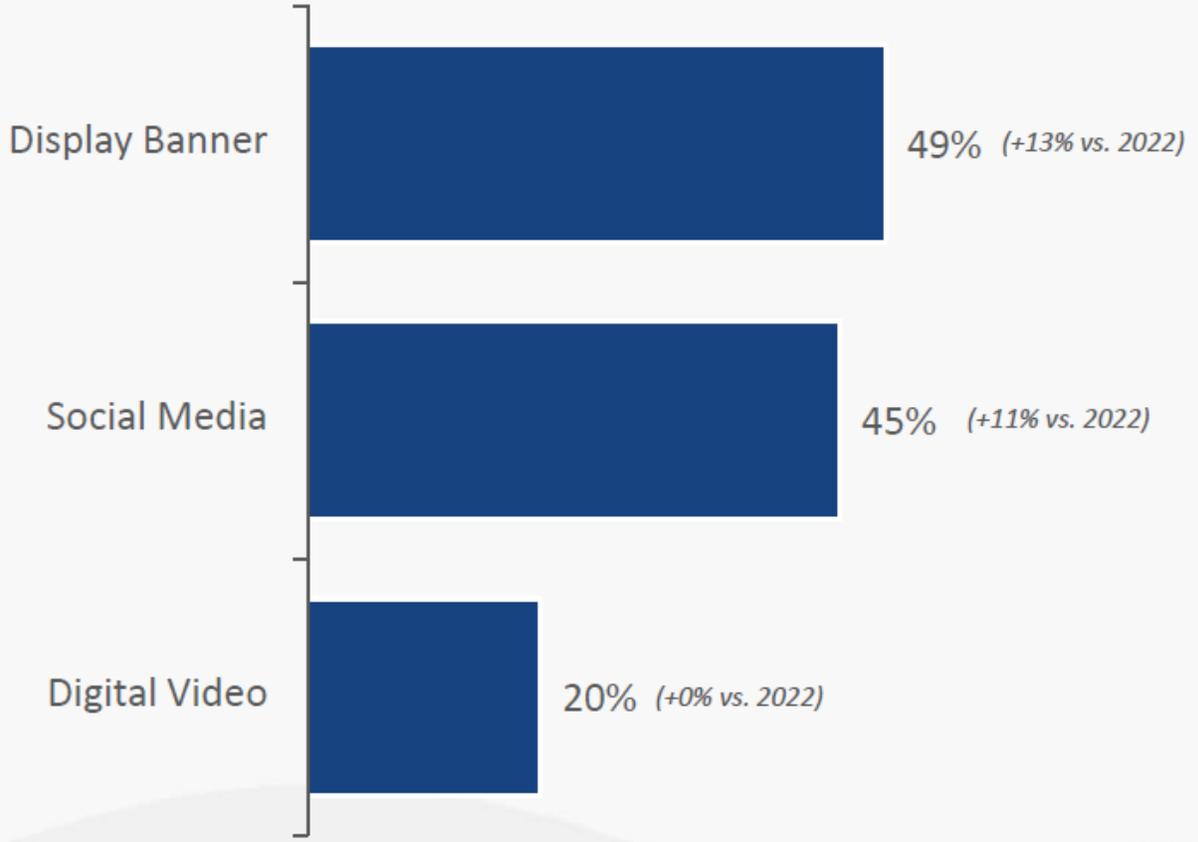
³Gross Return on Investment includes all expenditures, while Net Return on Investment only includes consumer-facing expenditures.

Table Rock Lake's aided ad awareness increased over 2022 levels, driven largely by strong results in Tier 1, display banners and social media ads.

Aided Ad Awareness* of 2023 Campaign by Distance Tier



Aided Ad Awareness of 2023 Campaign by Advertising Medium



(Digital Email 32% in 2022, not included in 2023)

Q30-35: Have you seen this advertisement, or ones like it, in the past 12 months?
*Aided advertising awareness shows creative images, videos and audio for Table Rock Lake to respondents.



**What does this mean
for your business?**

INCREMENTAL IMPACT



54.8k

incremental trips were generated by the Table Rock Lake CVB's 2023 campaign



\$1,079

was spent by the average travel party visiting the Table Rock Lake area



\$59.2M

in incremental travel revenue was generated by the Table Rock Lake CVB's 2023 campaign

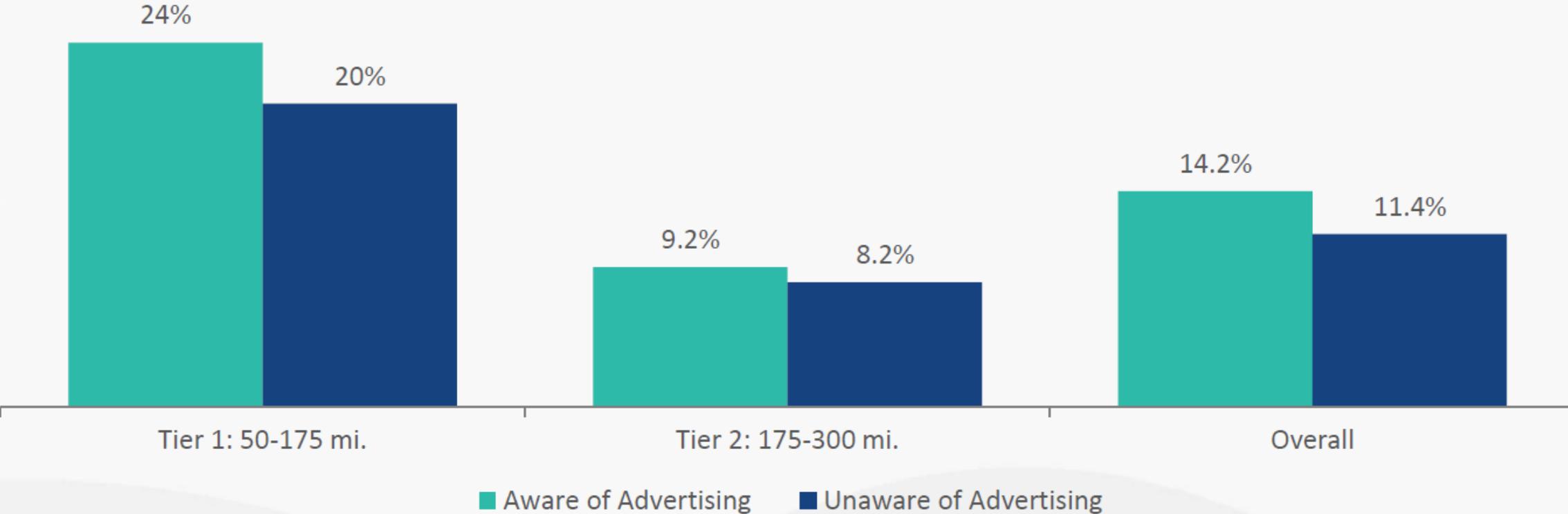


\$308

was returned to the local economy for each dollar invested in the Table Rock Lake marketing campaign

Travelers from both distance tiers who had seen/heard an ad(s) from this year's marketing campaign delivered higher market capture rates than those who were not reached by the 2023 marketing campaign.

% Of Travelers Who Visited Table Rock Lake After Seeing Ads

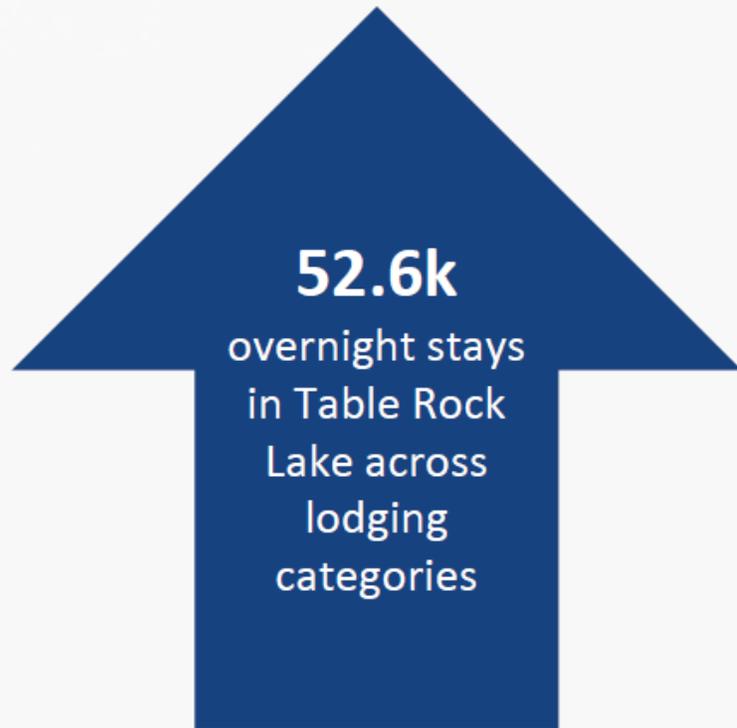


Q12: Please indicate which of these destinations you have visited in the past 12 months. Please select all that apply.

RESPONDENT BASE: VISITED ANY DESTINATION IN PAST 5 YEARS | N=965



Incremental Overnight Stays



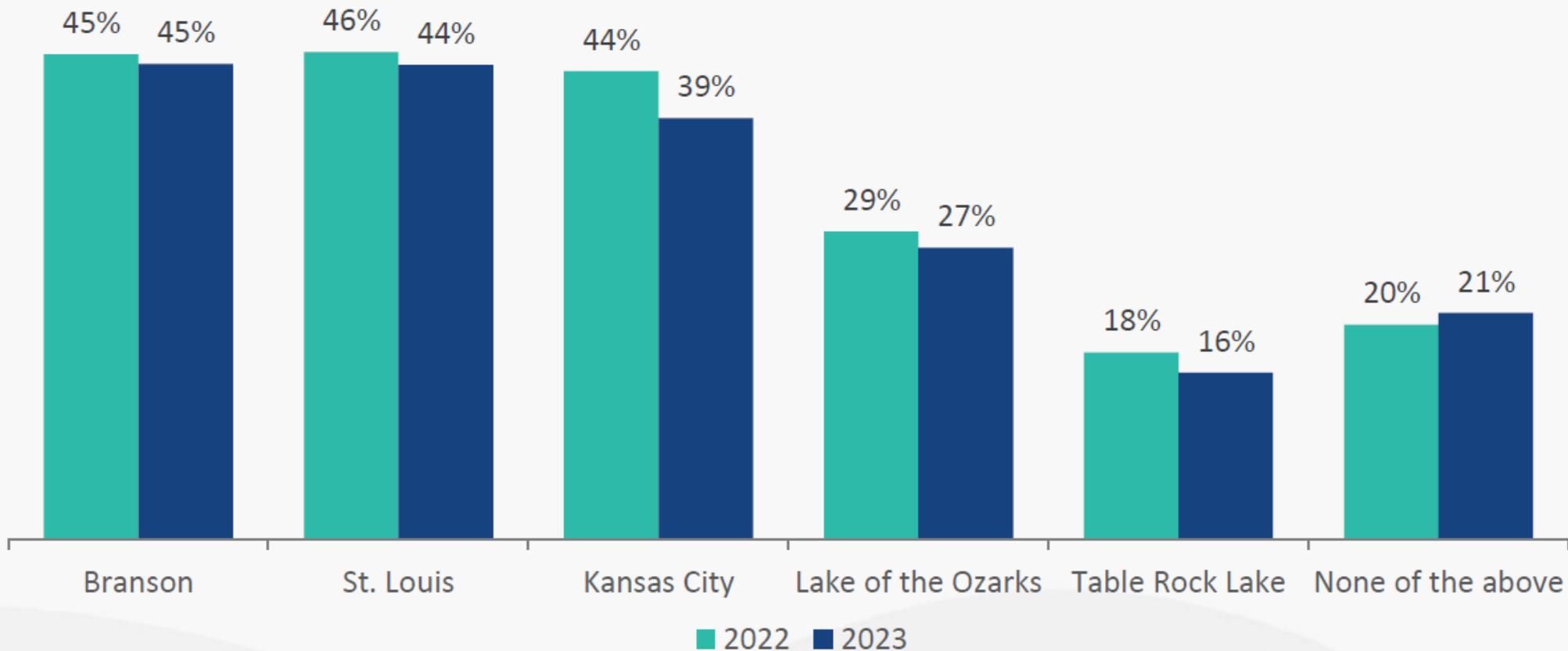
This year's campaign generated 52.6k incremental room nights from those staying overnight in the Table Rock Lake area at a Hotel, Motel, B&B, Inn, Condo, Cabin, Cottage, Timeshare, Campground, RV Park, Resort, or Airbnb. These are room nights that would not have been sold otherwise.

Extrapolated across the total number of rooms/units purchased, the 2023 TRL marketing campaign generated approximately 14% of travelers' room demand in Table Rock Lake area during this timeframe.

Traveler Profile

Travel to various Missouri destinations is comparable yet slightly lower than it was in 2022, including visitation to Table Rock Lake. Travelers, in general, have begun traveling a bit farther in 2023 as the pandemic becomes a more distant memory.

Destinations Visited in the Past 5 Years



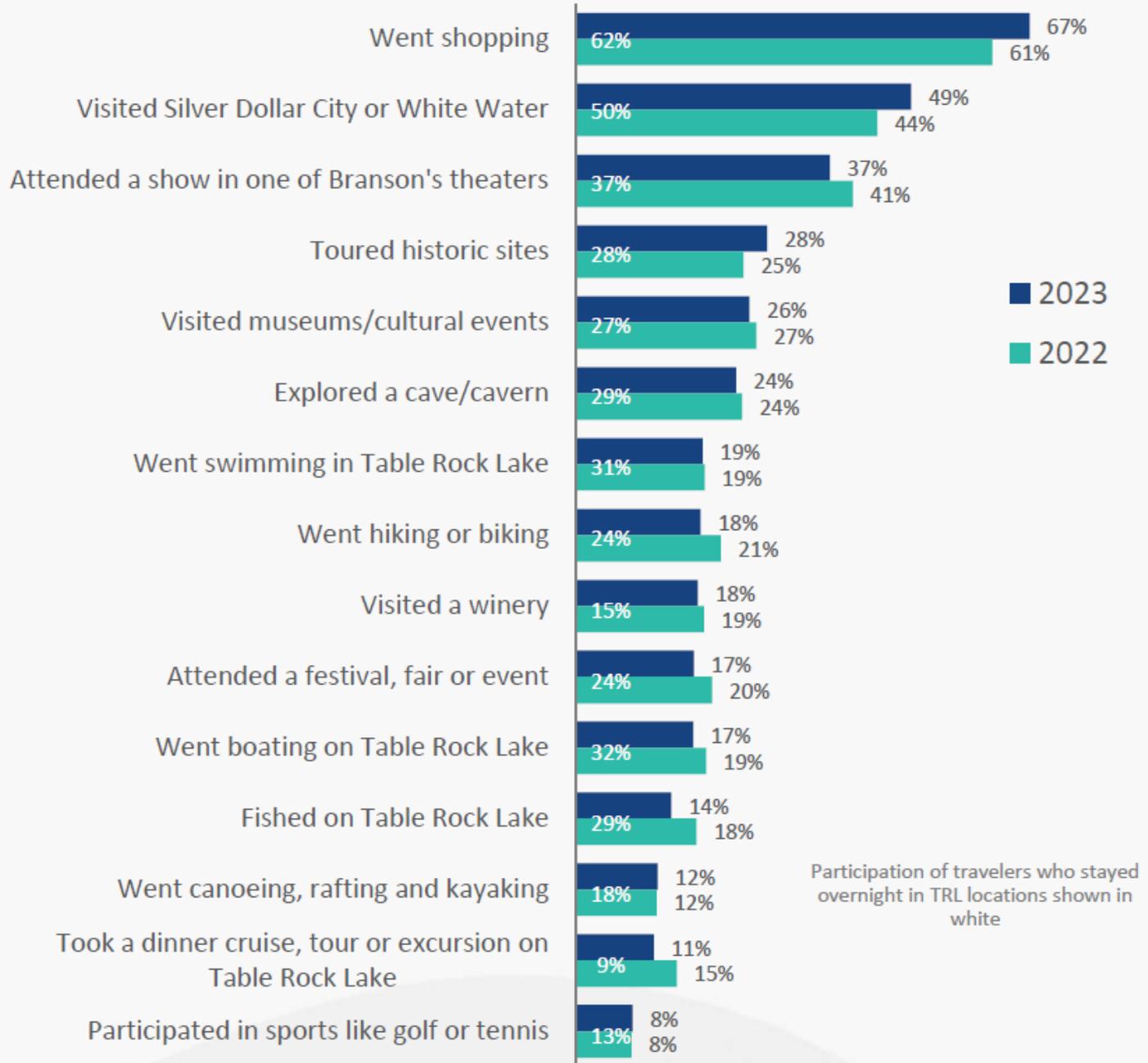
Q11: Which of these destinations have you visited in the past 5 years? Select all that apply



Area Activity Participation

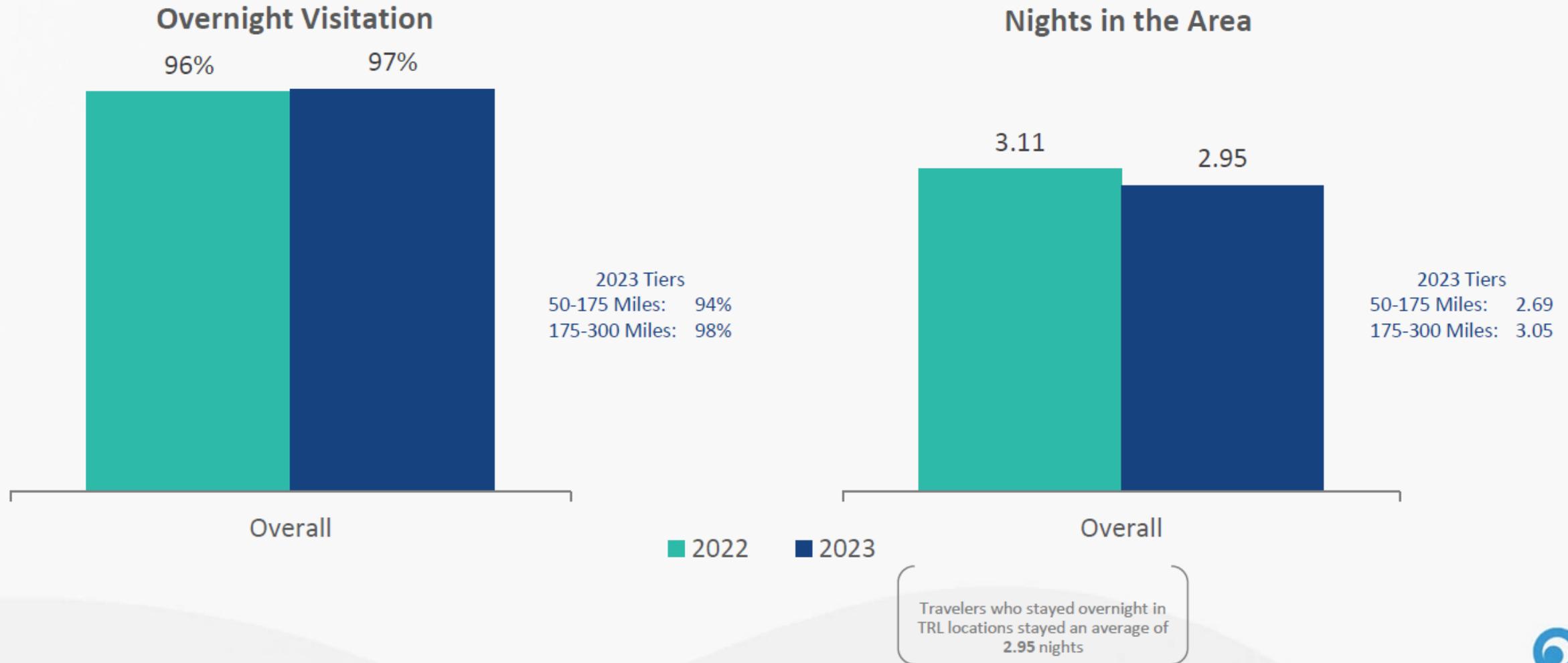
Shopping at local businesses remains the most popular activity for those visiting the Table Rock Lake area.

Visiting SDC or White Water, and attending a theater show also remain in the top 3 participated activities.



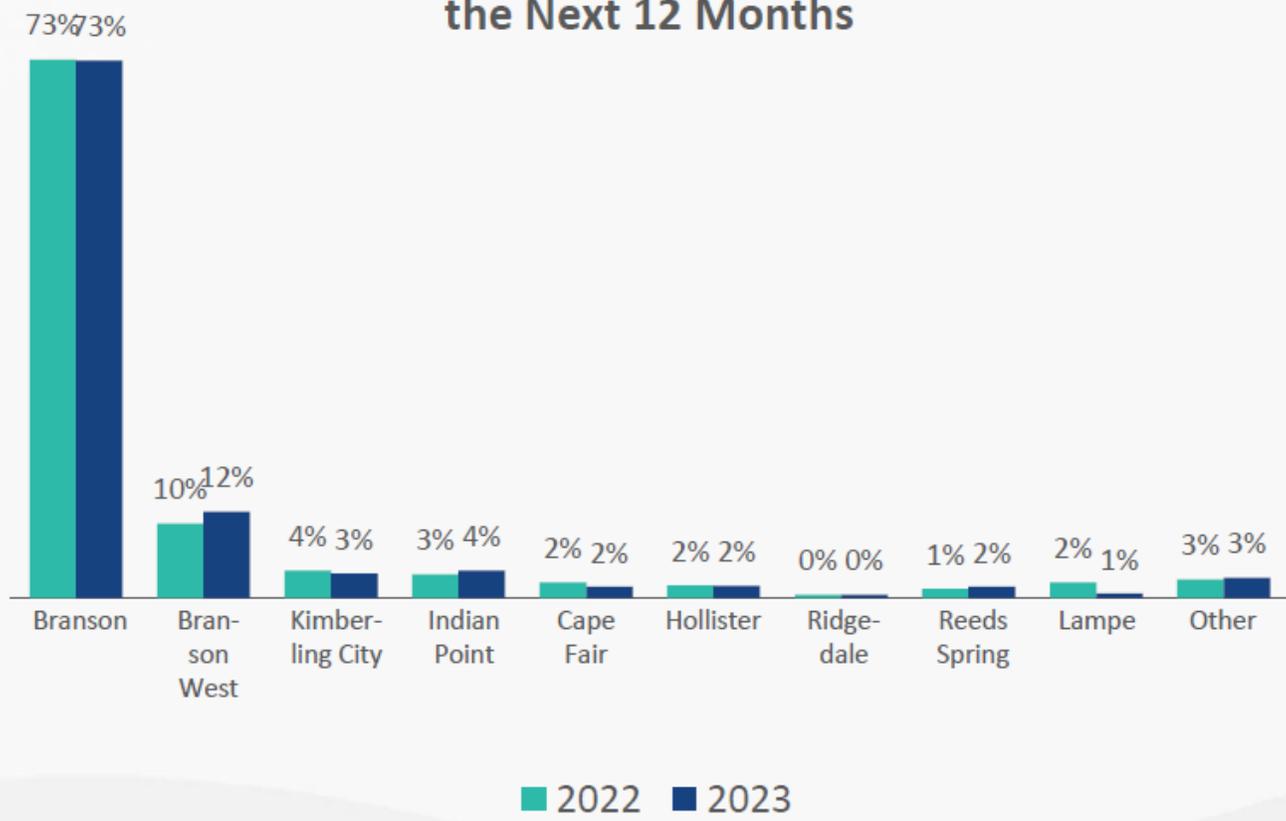
Q19: Which of the following activities did you participate in on your most recent visit to the Table Rock Lake area?

Overnight visitation holds steady, but length of stay slipped a bit from last year.

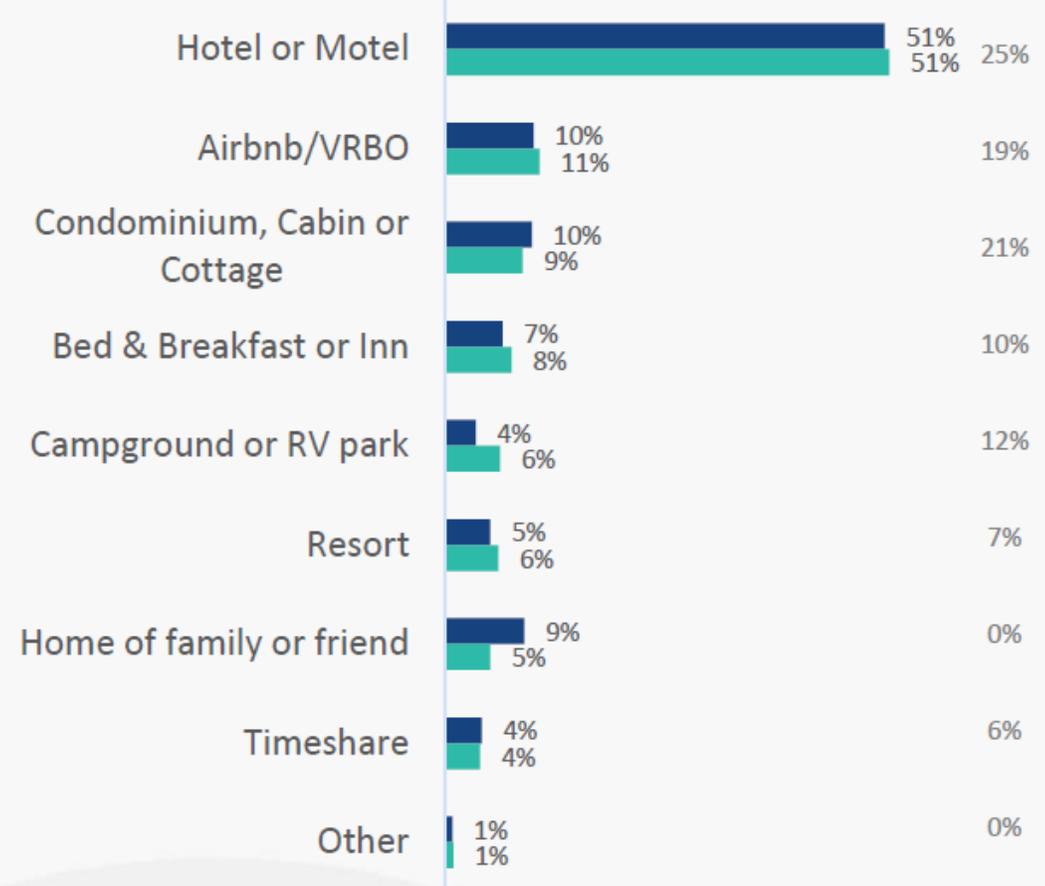


Most overnight visitors continue to spend the night in Branson with most reporting that they spent the night in a hotel or motel.

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



Overnight Accommodations



Q24: In which of the following cities/areas did you spend the night on your most recent visit to the Table Rock Lake area?
 Q22: Which of the following best describes the type of accommodations you used on your most recent trip?

Brand Advocates of Table Rock Lake are more likely to have seen a Table Rock Lake ad with a higher lift in visitation intent than the average Table Rock Lake visitor.

	Table Rock Lake Overnight Visitors	Branson Overnight Visitors	Brand Advocates*
Adult Visitor Ages	40	44	42
Children in the Party	47%	50%	58%
No. Trips to the Area	2.0	1.7	1.9
Length of Stay (nights)	3.3	2.8	3.0
Saw TRL's Ads	75%	64%	81%
Post-Ad Lift in Intent	+19 pts	+18 pts	+35 pts
HH Income	\$77.2K	\$68.4K	\$75.1K
Average Distance (miles)	169 miles	161 miles	159 miles

*Brand Advocates are visitors who rated NPS for Table Rock Lake a 9 or 10 and will probably/definitely return.

To summarize...

Our advertising funds for media buys come from the Missouri Division of Tourism.

YOU fill the gap. By being our partner, you play a role in this economic impact.

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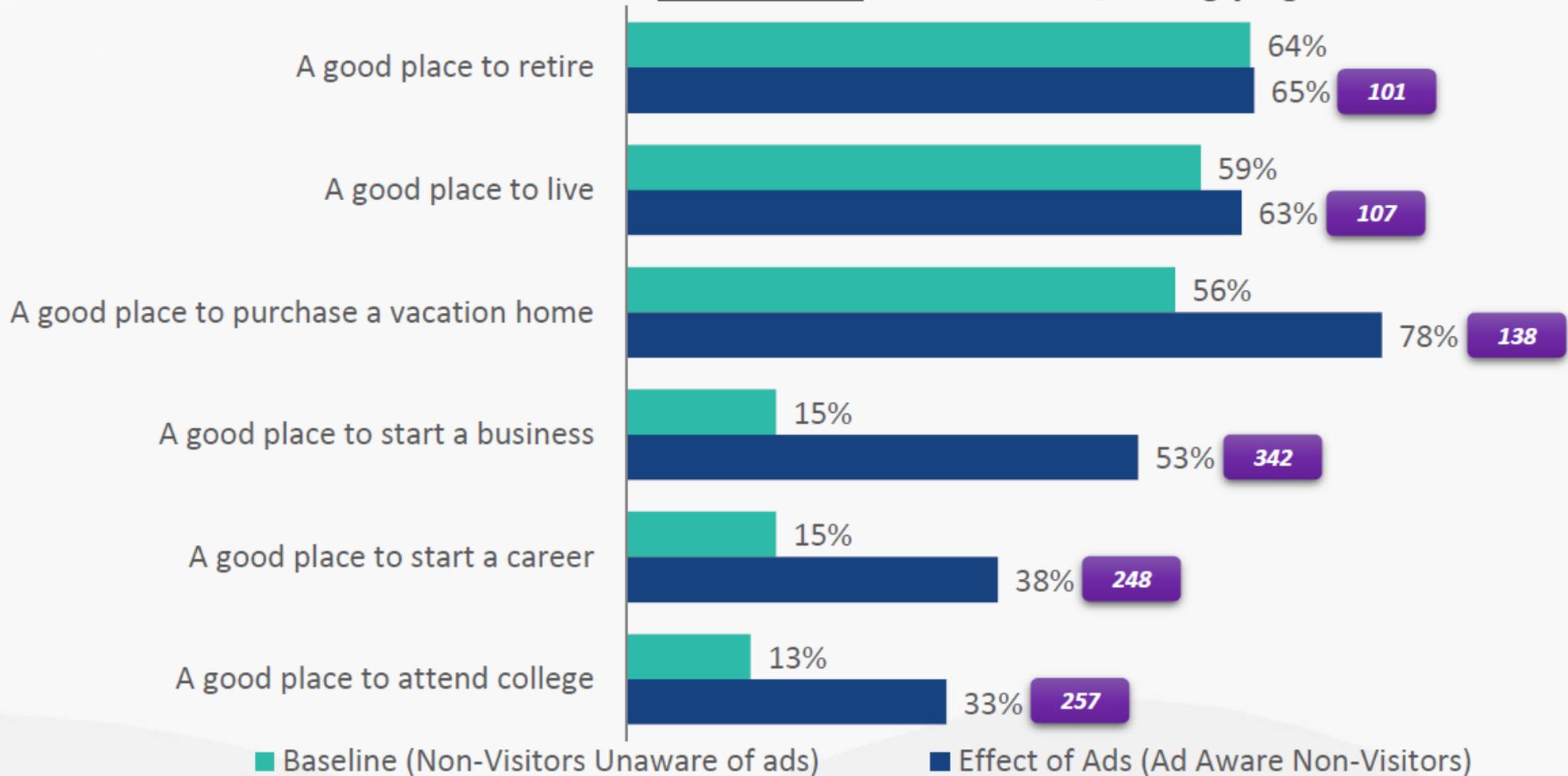
Halo Effect

Halo Effect in Tourism Marketing

- 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, travelers’ image of a destination’s 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 destination advertising also impacts other parts of the destination’s brand—such as being a good place to live, work, start a business, attend college, purchase a vacation home or retire.

Advertising alone has caused travelers to be 38% more likely to feel Table Rock Lake is a good place to purchase a vacation home and 242% more likely to agree it's a good place to start a business.

Aware vs. Unaware Non-Visitors: % Somewhat/Strongly Agree

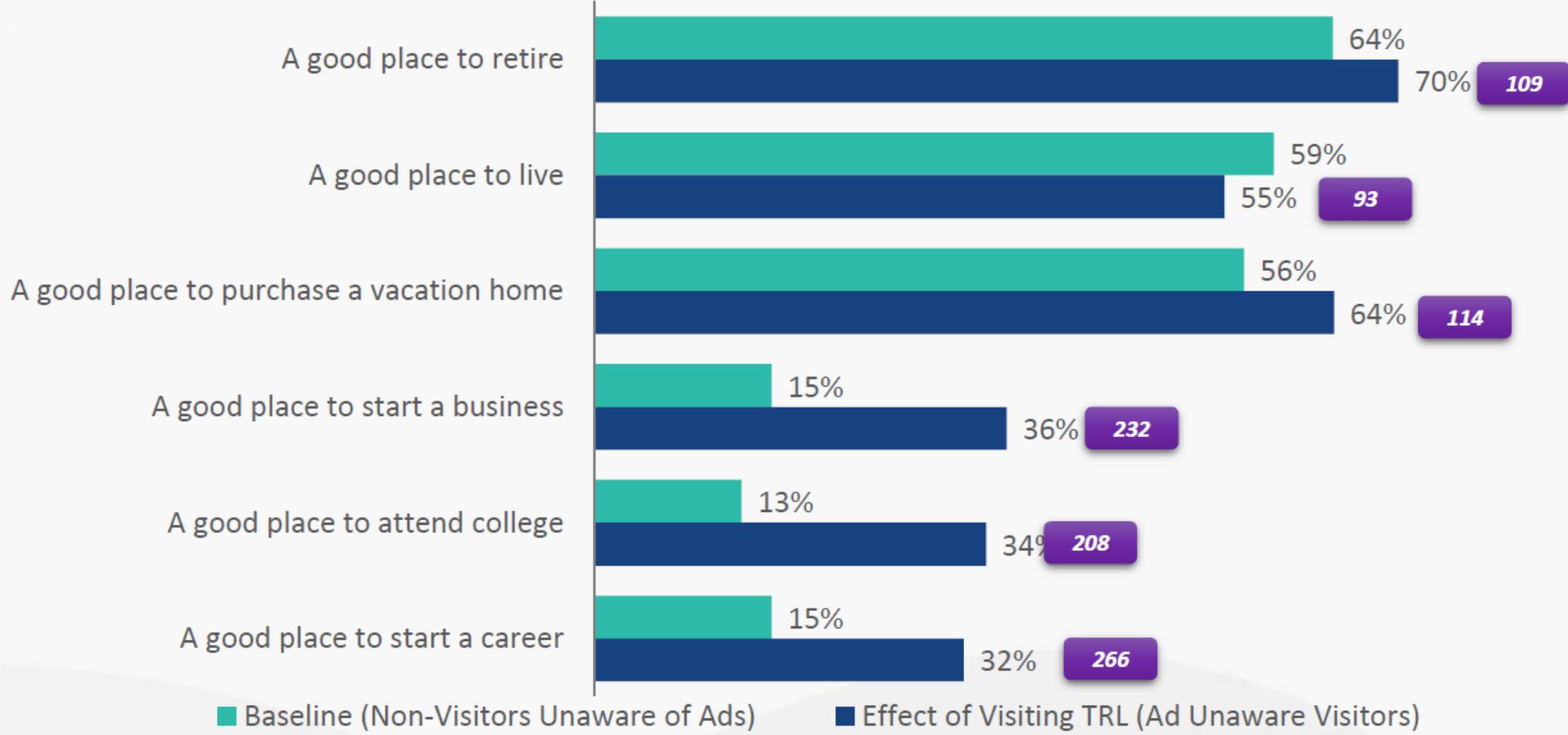


Q28: Please indicate how much you agree or disagree that each of the following words/phrases describes Table Rock Lake when thinking about it as a place to live, work, raise a family or start a business.



Visitation of Table Rock Lake (without seeing a single ad) made travelers 14% more likely to feel the area is a good place to purchase a vacation home and 132% more likely to agree the area is a good place to start a business compared to prospects who didn't visit.

Visiting vs. Not Visiting Unaware of Ads: % Somewhat/Strongly Agree



Q28: Please indicate how much you agree or disagree that each of the following words/phrases describes Table Rock Lake when thinking about it as a place to live, work, raise a family or start a business.



Advertising and/or visitation to the area each have a positive impact on traveler perceptions of the area. Those who have both been exposed to an ad and visited Table Rock Lake are 20% more likely to view Table Rock Lake as a good place to live, 330% more likely to view the area as a good place to start a business and 255% more likely to view Table Rock Lake as a good place to start a career.

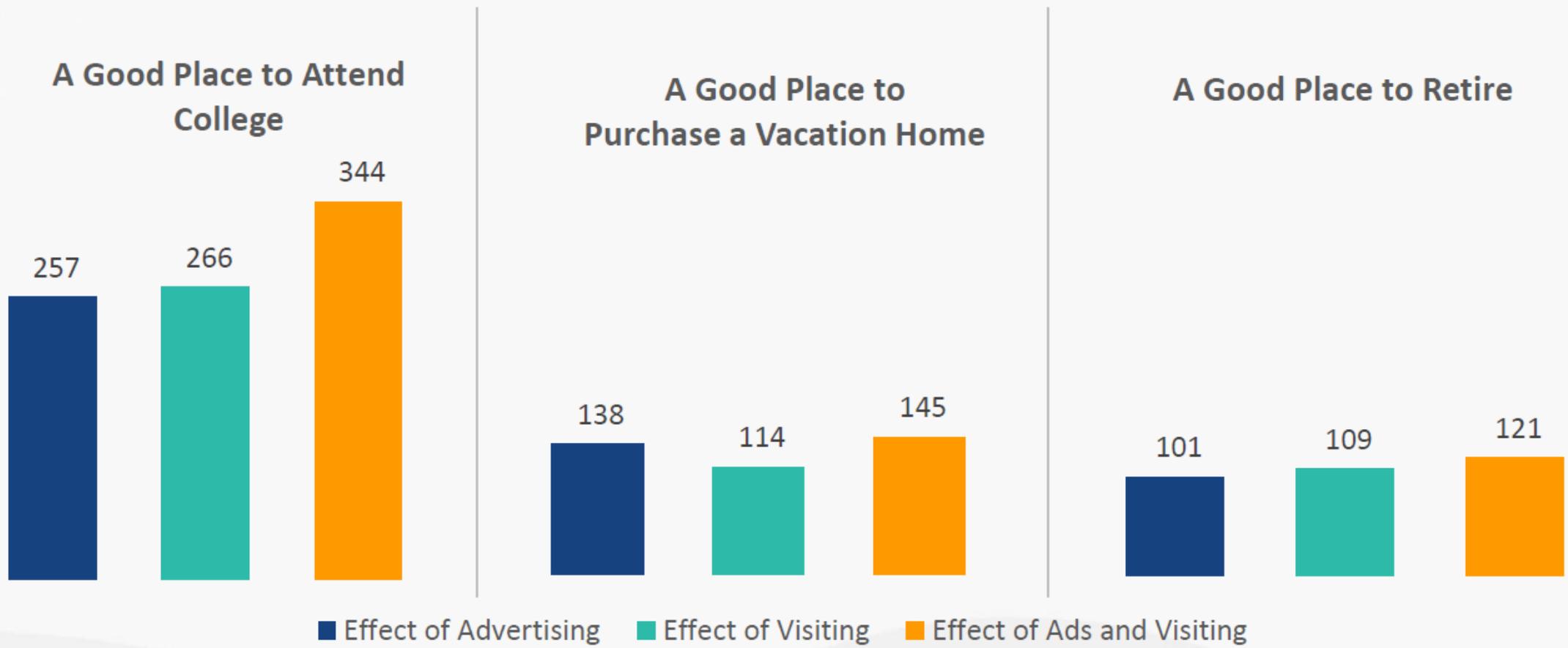


RESPONDENT BASE: UNAWARE NON-VISITORS | N=398
 AWARE NON-VISITORS | N=417
 UNAWARE VISITORS | N=113
 AWARE VISITORS | N=272



Q28: Please indicate how much you agree or disagree that each of the following words/phrases describes Table Rock Lake when thinking about it as a place to live, work, raise a family or start a business.

Additionally, those who have both seen an ad and visited Table Rock Lake in the past 12 months are 244% more likely to agree that Table Rock Lake is a good place to attend college.



Q28: Please indicate how much you agree or disagree that each of the following words/phrases describes Table Rock Lake when thinking about it as a place to live, work, raise a family or start a business.

RESPONDENT BASE: UNWARE NON-VISITORS | N=398
AWARE NON-VISITORS | N=417
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