

Wisconsin

2014 Tourism Advertising Evaluation & Image Study

*Prepared for:
Travel Wisconsin, Wisconsin Department of Tourism*

Final Report, March 2015

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Research Objective



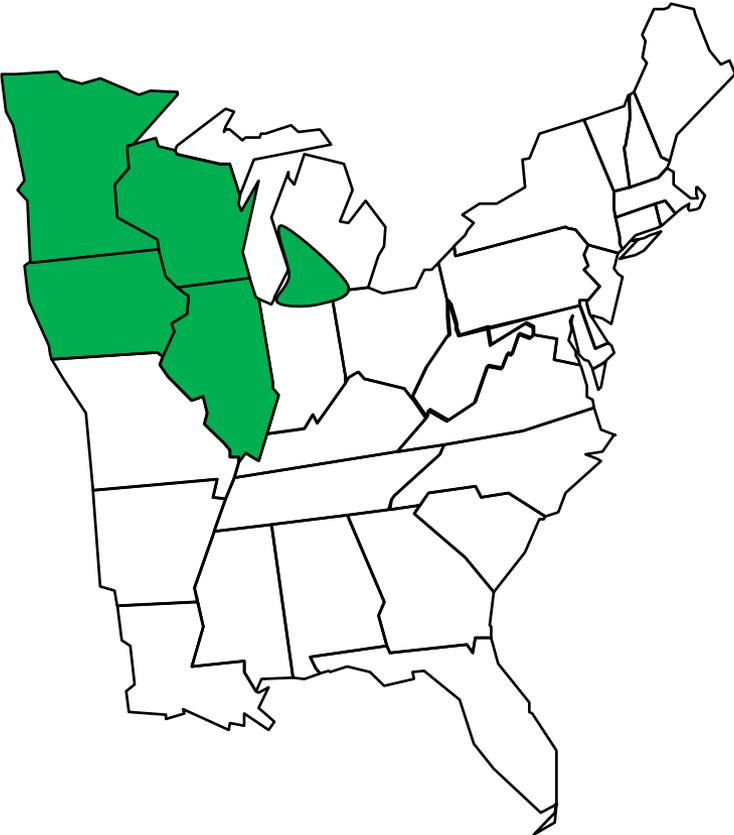
- The purpose of this research is to provide:
 - *fundamental strategic insights about the image of Wisconsin and its key competitors with respect to key destination choice factors;*
 - *an evaluation of the 2014 tourism advertising campaign in terms of:*
 - *top line measures:*
 - *awareness of the advertising*
 - *impact on Wisconsin's image as a travel destination*
 - *the bottom line return on Wisconsin's investment in the campaign in terms of:*
 - *incremental travel to Wisconsin*
 - *incremental traveler spending in Wisconsin*
 - *incremental state and local taxes*

Research Method



- The study was conducted among a representative sample of adult travelers residing in Wisconsin's advertising markets.
 - *'Travelers' means respondents had taken a day and/or overnight pleasure trip anywhere in the past 3 years and intend to take another in the next 2 years.*
- The survey was conducted via a major American online consumer panel which is demographically balanced to represent the national population.
 - *1,664 individuals responded to the research.*

Wisconsin's Regional Markets



Research Method (Cont'd)



- The questionnaire addressed three key areas:
 - ***Wisconsin's Image as a Travel Destination***
 - *respondents rated Wisconsin and selected competitive states across an extensive list of characteristics or destination attributes.*
 - ***Travel to Wisconsin***
 - *respondents reported the number of day and overnight trips they took to Wisconsin during and shortly after the advertising campaign.*
 - ***Advertising awareness***
 - *actual creative from the 2014 campaign were exposed and respondents reported recall of each.*
 - *we use this forced exposure approach to ensure that we are measuring the State sponsored advertising only – not that of Wisconsin attractions and accommodation facilities.*

Research Method (Cont'd)



- **ROI calculation:**

- *the **Longwoods R.O.EYE™** method quantifies the relationship between awareness of campaign elements and trip taking.*
- *a baseline measure is generated to estimate the level of visitation that would have occurred in the absence of advertising activity.*
- *using the principles and techniques of experimental design, we control for the effects of internal and external factors that could otherwise influence the result.*

Travel Motivators & Hot Buttons

The Indirect Approach



- ⦿ Longwoods takes an innovative approach to profiling the factors that motivate travel and destination choice.
 - ⦿ *direct questioning of respondents on this subject can often lead to misleading answers. Respondents' answers tend to favor rational over emotional ideas because they are easier to call to mind and articulate.*
- ⦿ Longwoods, therefore, takes an indirect approach to uncovering these motivators.
 - ⦿ *through predictive modeling analytics, we get below the surface and uncover the true factors that drive overall ratings of destination appeal and choice.*

Travel Motivators



- Respondents are asked to rate selected states across a robust list of destination *attributes* or characteristics.
- The statistical correlation between each attribute rating and the overall rating for being “*A place I would really enjoy visiting*” is then calculated.
 - *attributes showing strong correlations are strong predictors of destination choice and those with the highest are the ‘Hot Buttons’ that should be included in the communications messaging strategy .*

Travel Motivators



- ⦿ Through statistical analysis, we have derived the relative importance of each attribute in determining people's overall interest in the destinations.
- ⦿ Then, in order to better communicate the results, the data have been grouped into 12 broader categories, or travel motivators, and ranked from more important to less important.
- ⦿ These travel motivator **factors** reflect the aggregated importance across related attributes.

Travel Motivators



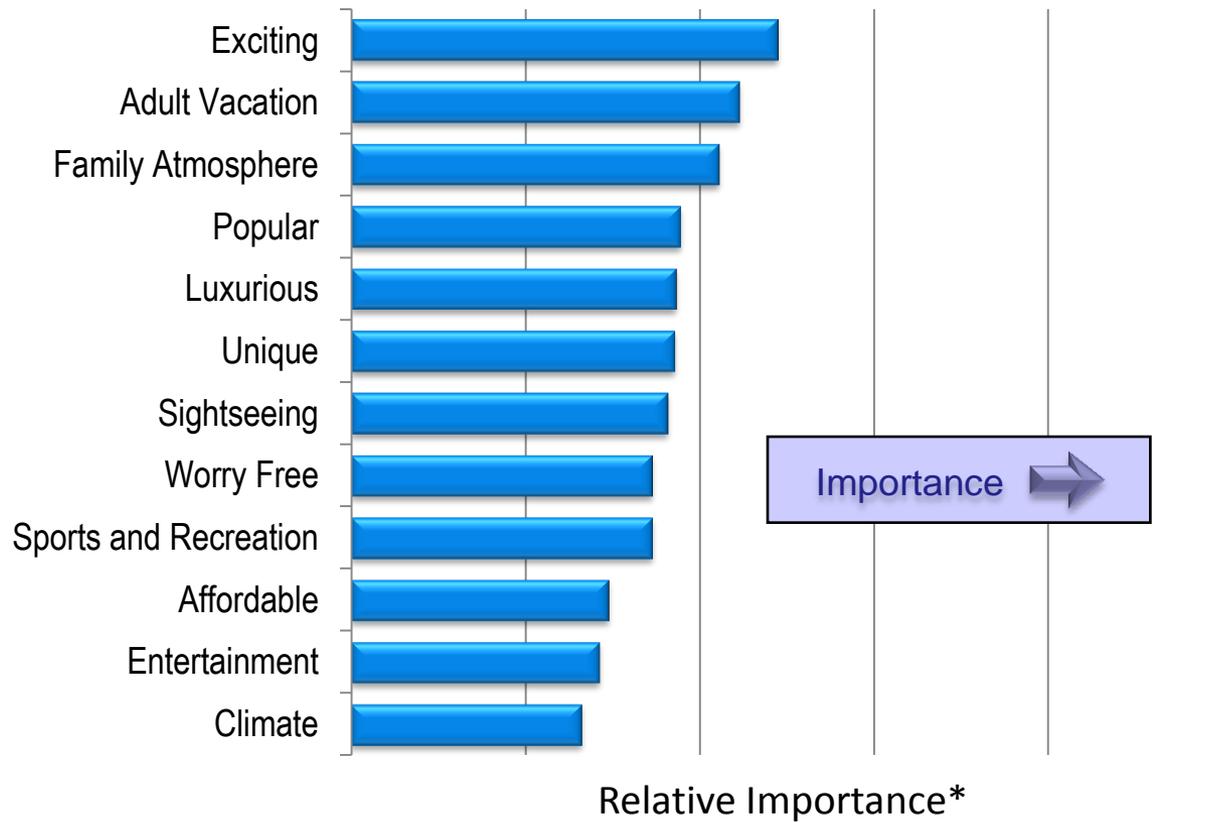
- ◉ The more important a travel motivator is, the more important it should be for a destination to communicate that message about itself, taking into consideration its ability to deliver on the promise with its product.
- ◉ Within each travel motivator category, the image attributes that make up that category are also presented in their order of importance.
- ◉ When evaluating Wisconsin's image and product delivery, and those of the competitive set, it is critical to keep the relative importance of each attribute in mind.

Travel Motivators and Hot Buttons



- ◉ The most important travel motivator **factors** that drive interest in a destination are that it:
 - ◉ *is **exciting** – an exciting place that provides a great sense of real adventure and fun*
 - ◉ *provides **an adult atmosphere** but is also a great **family destination** – a place that families and children would enjoy*
- ◉ It is also important that the destination:
 - ◉ *is well-known and **popular** with vacationers*
 - ◉ *provides opportunities to indulge in **luxury** via elegant/sophisticated restaurants and first-class hotels and resorts*
 - ◉ *Provides **unique experiences** as well as great **sightseeing opportunities***
 - ◉ *offers a welcoming, relaxing, safe, **worry free** experience*
 - ◉ *is great for **sports and recreation**, including excellent state park facilities and opportunities for exploring nature*

Travel Motivators



*A measure of the degree of association between each factor and whether destination is a place "I would really enjoy visiting."

Hot Buttons



Top 10 Hot Buttons

A fun place for a vacation

An exciting place

Provides a unique vacation experience

Lots to things to see and do

Popular with vacationers

Good for an adult vacation

Good vacation packages

Truly beautiful scenery

Excellent state park facilities

A vacation there is a real adventure

Wisconsin's Image

Wisconsin's Image



- To obtain travelers' perceptions of Wisconsin and its key competitors, respondents were asked to rate each state across a battery of attributes, using a ten-point scale where 10 meant 'Agree completely' and 1 meant 'Do not agree at all'.
 - *a '0' rating was allowed if they had no impression at all,*
 - *image charts report the proportion of respondents who rated a destination at 10, 9, or an 8 on each attribute.*
- Competitive states included: *Minnesota, Michigan, Missouri, Illinois, Iowa, and Indiana.*

Wisconsin's Image Strengths

Wisconsin's Image Strengths

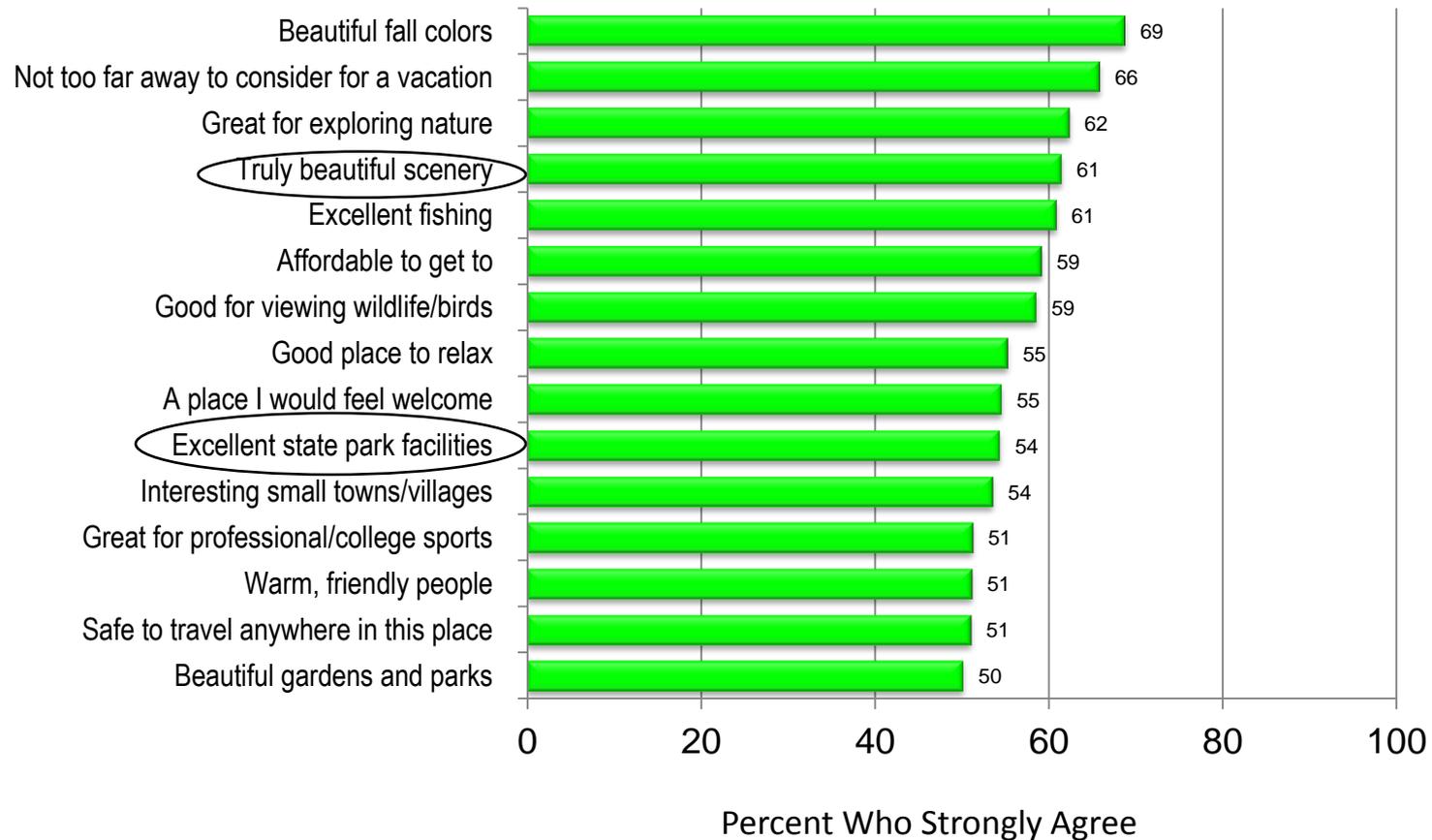


- Wisconsin received its highest image ratings for its:
 - *outdoor assets:*
 - Beautiful and colorful nature and opportunities to go fishing, see wildlife and enjoy the scenery
 - *an accessible and affordable vacation destination*
 - *relaxing and welcoming environment with warm, friendly people*
 - *excellent state park facilities*
 - *safe, worry-free environment*
 - *a place with great professional and college sports*

Wisconsin's Top Image Strengths



Base: Total Travelers



Circled attributes are some of the most important image hot buttons for travelers

Wisconsin's Image vs. the Competition

Wisconsin's Image vs. The Competition

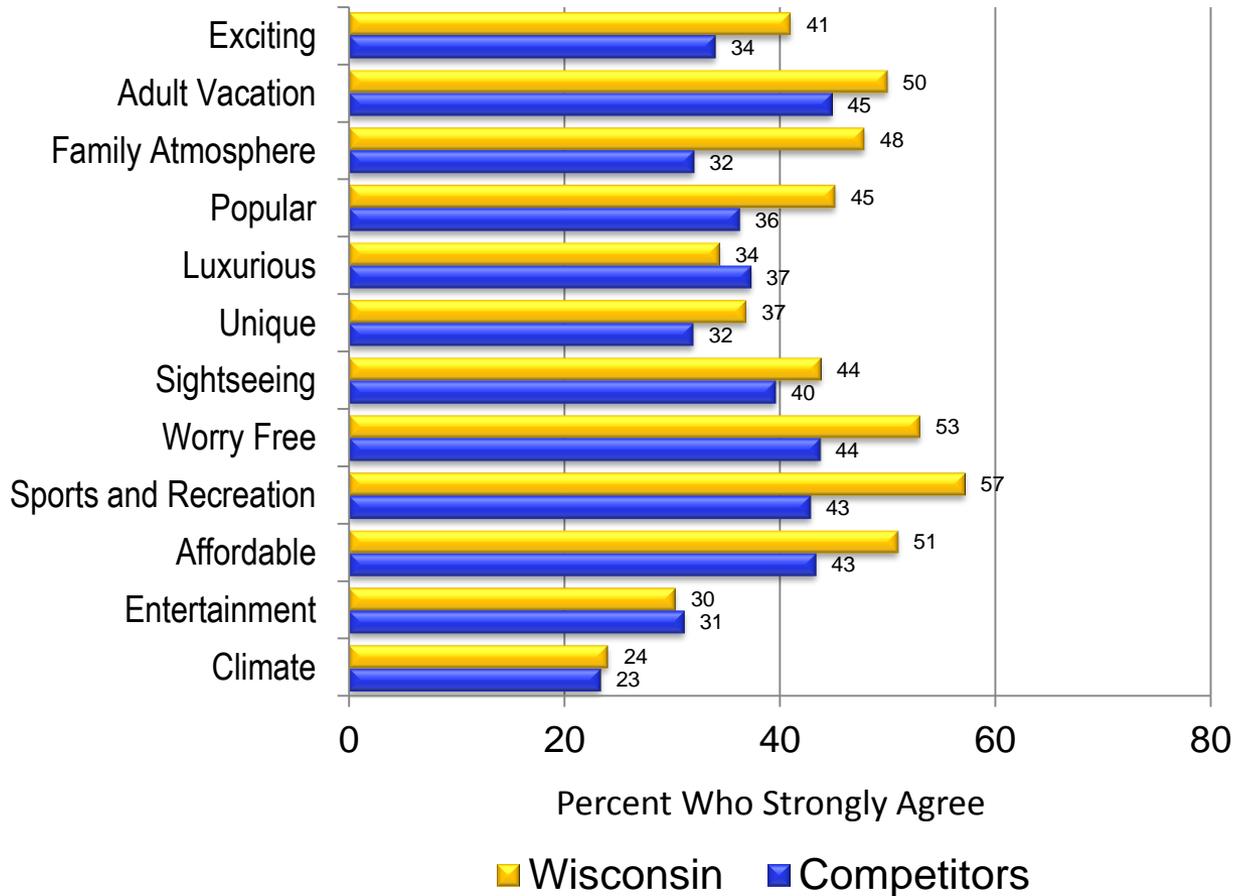


- ◉ Wisconsin has a strong positive image as a travel destination.
- ◉ Wisconsin scored highly for having good sports and recreation opportunities, being worry free, affordable and providing experiences that adults also enjoy (over half of respondents strongly agreed with scores of 8, 9 or 10 out of ten), and also scored highly as having a family-friendly atmosphere
- ◉ In comparison to the competition, Wisconsin strongly delivered on all three of the most important factors for generating interest in visiting (an exciting place, good for an adult vacation and a great family atmosphere).
- ◉ Wisconsin was rated more highly than the average of the competition* on every factor except luxurious, sightseeing, entertainment, and climate where the state was virtually tied with the competition.

Wisconsin's Overall Image vs. The Competition



Base: Total Travelers

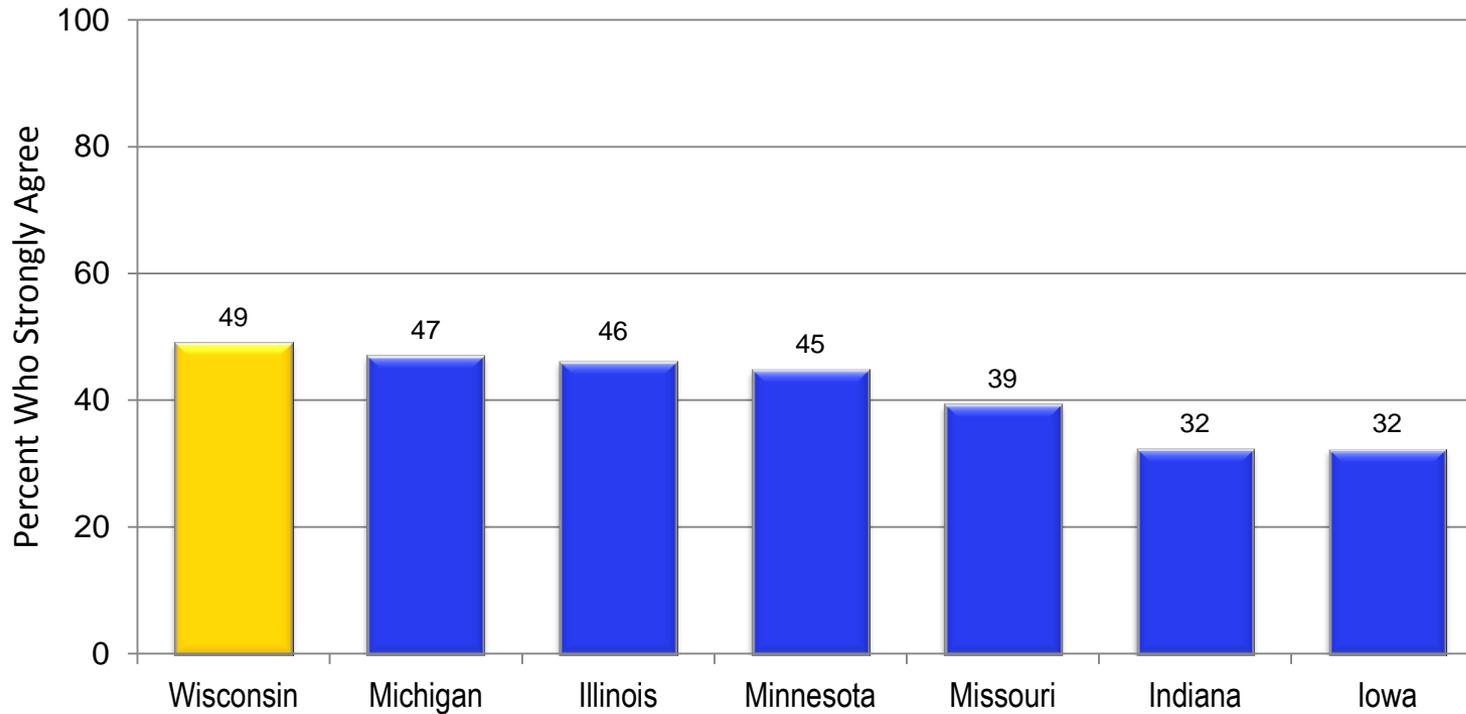


* Competitors include: Minnesota, Michigan, Missouri, Illinois, Iowa, and Indiana

Overall Image: “Would Really Enjoy Visiting”



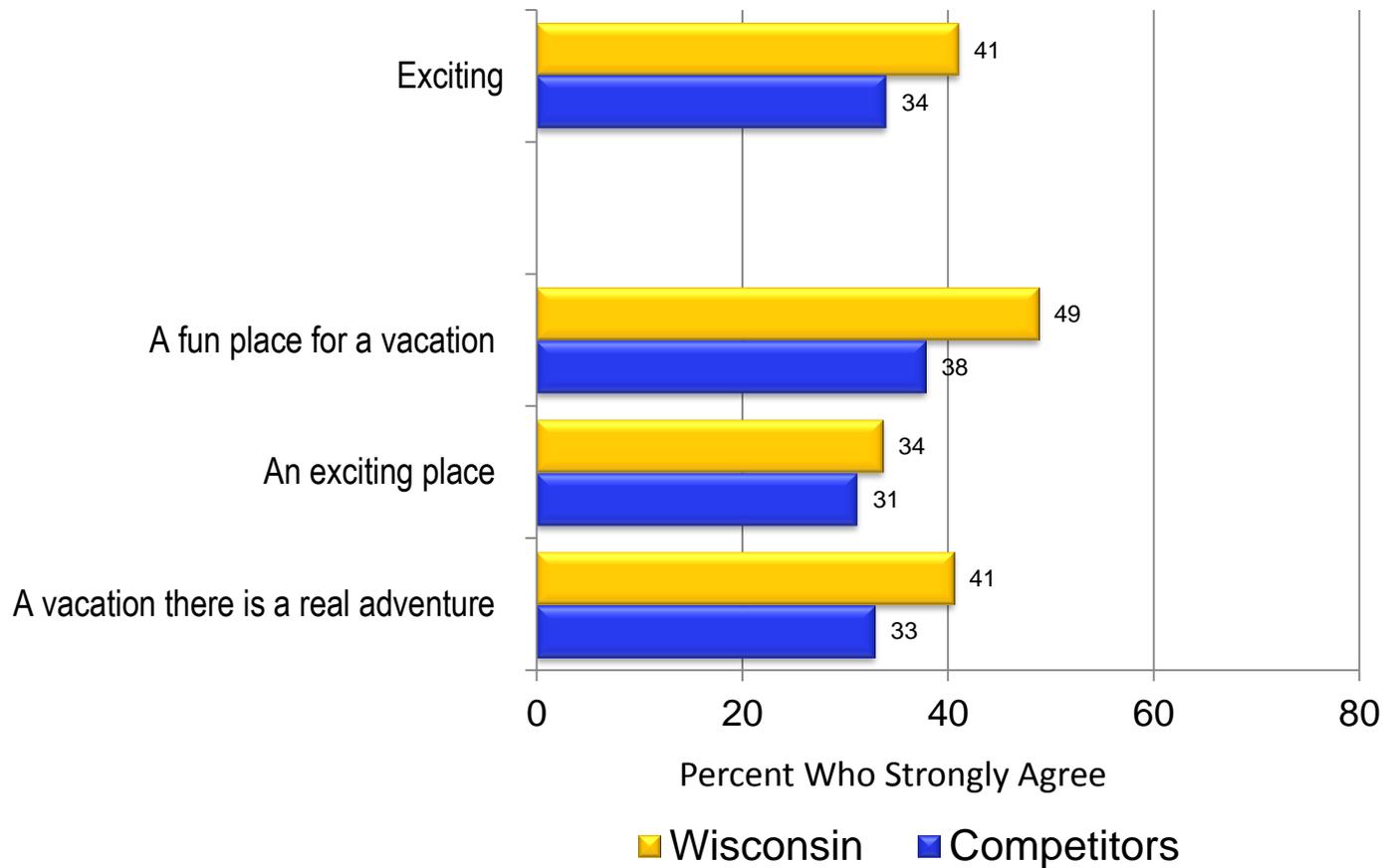
Base: Total Travelers



Wisconsin's Image vs. The Competition — Exciting



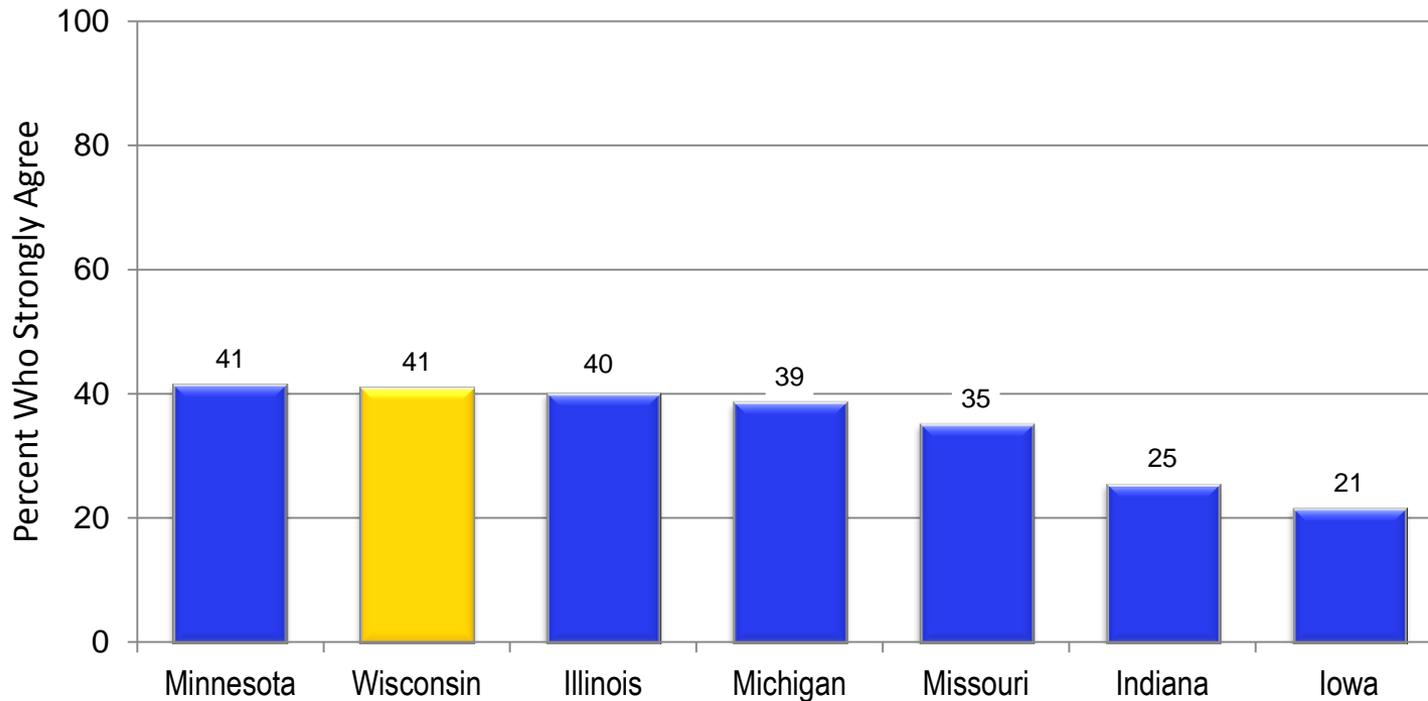
Base: Total Travelers



Wisconsin's Image vs. The Competition — Exciting



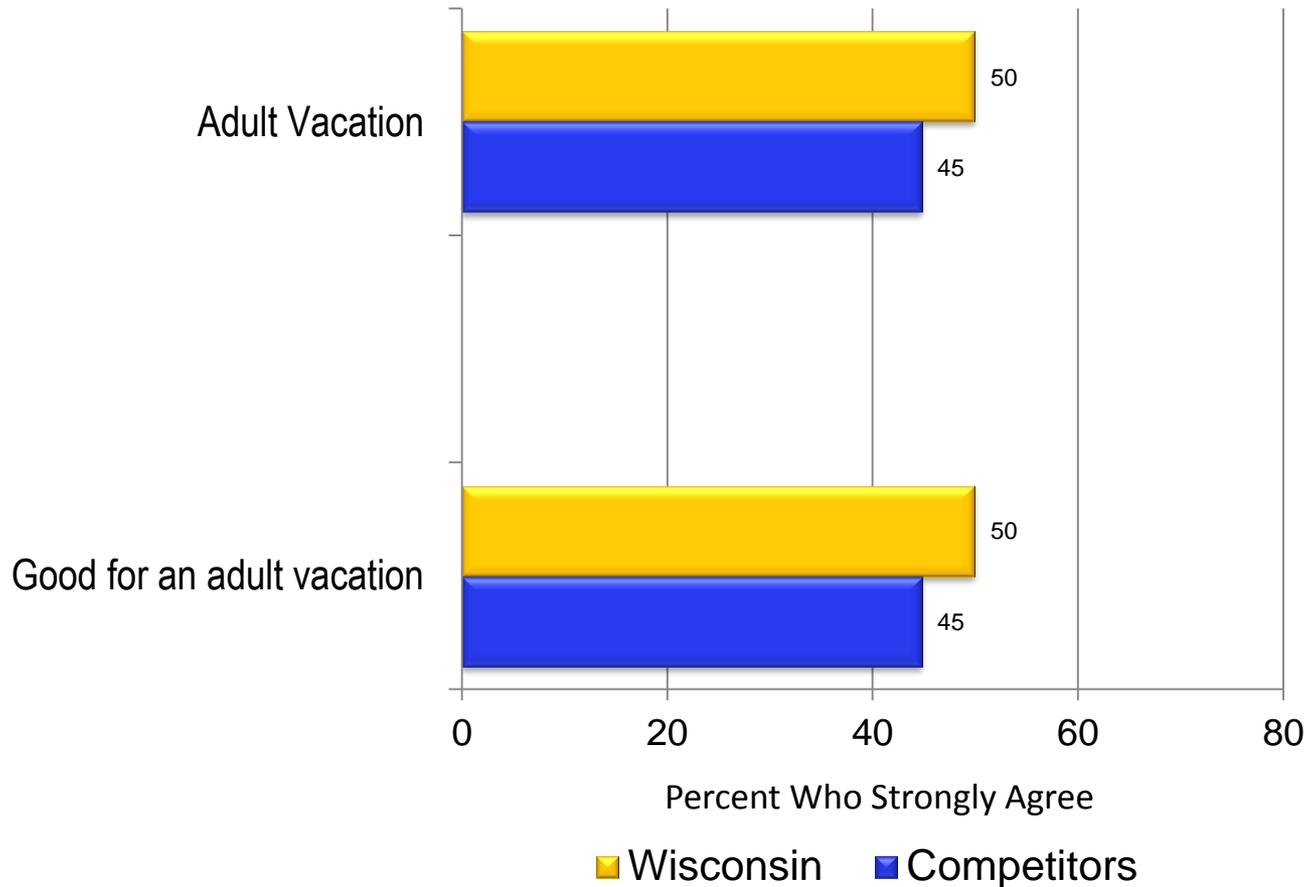
Base: Total Travelers



Wisconsin's Image vs. The Competition — Adult Vacation



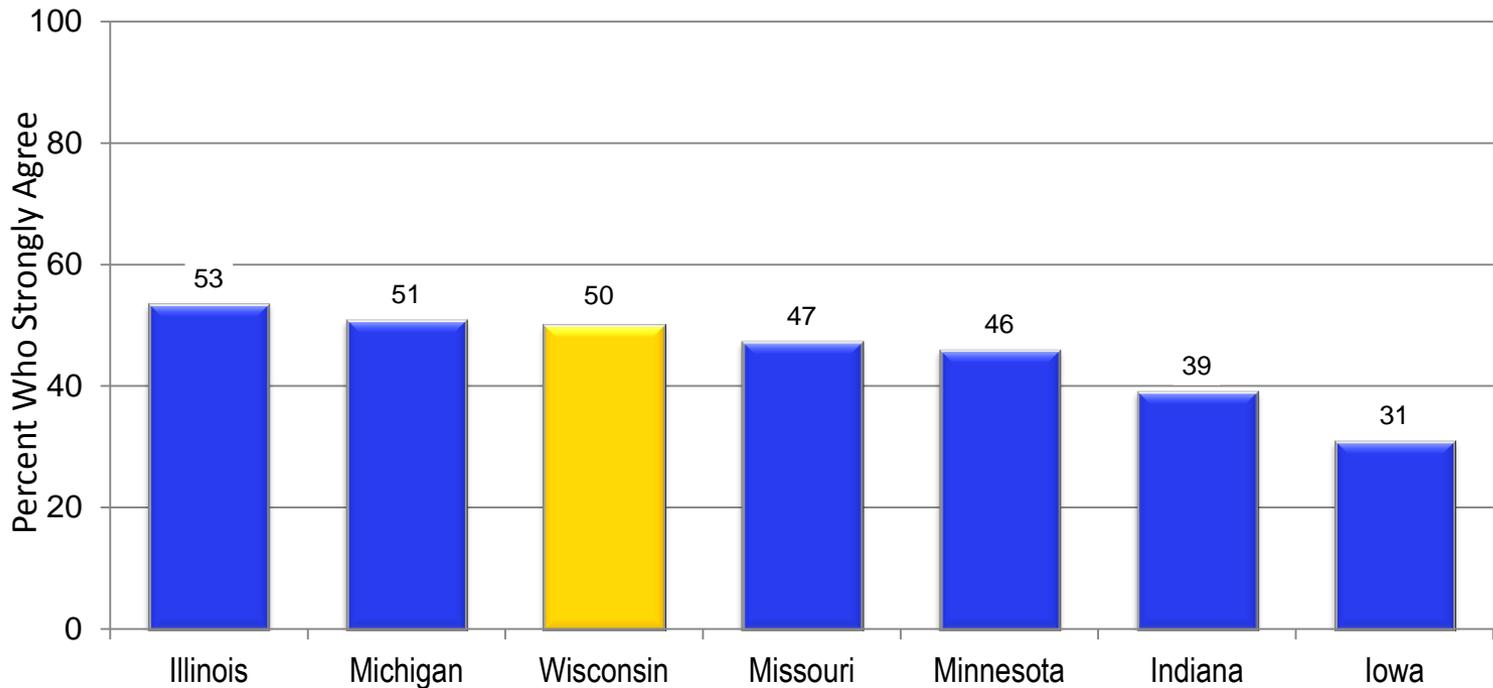
Base: Total Travelers



Wisconsin's Image vs. The Competition — Adult Vacation



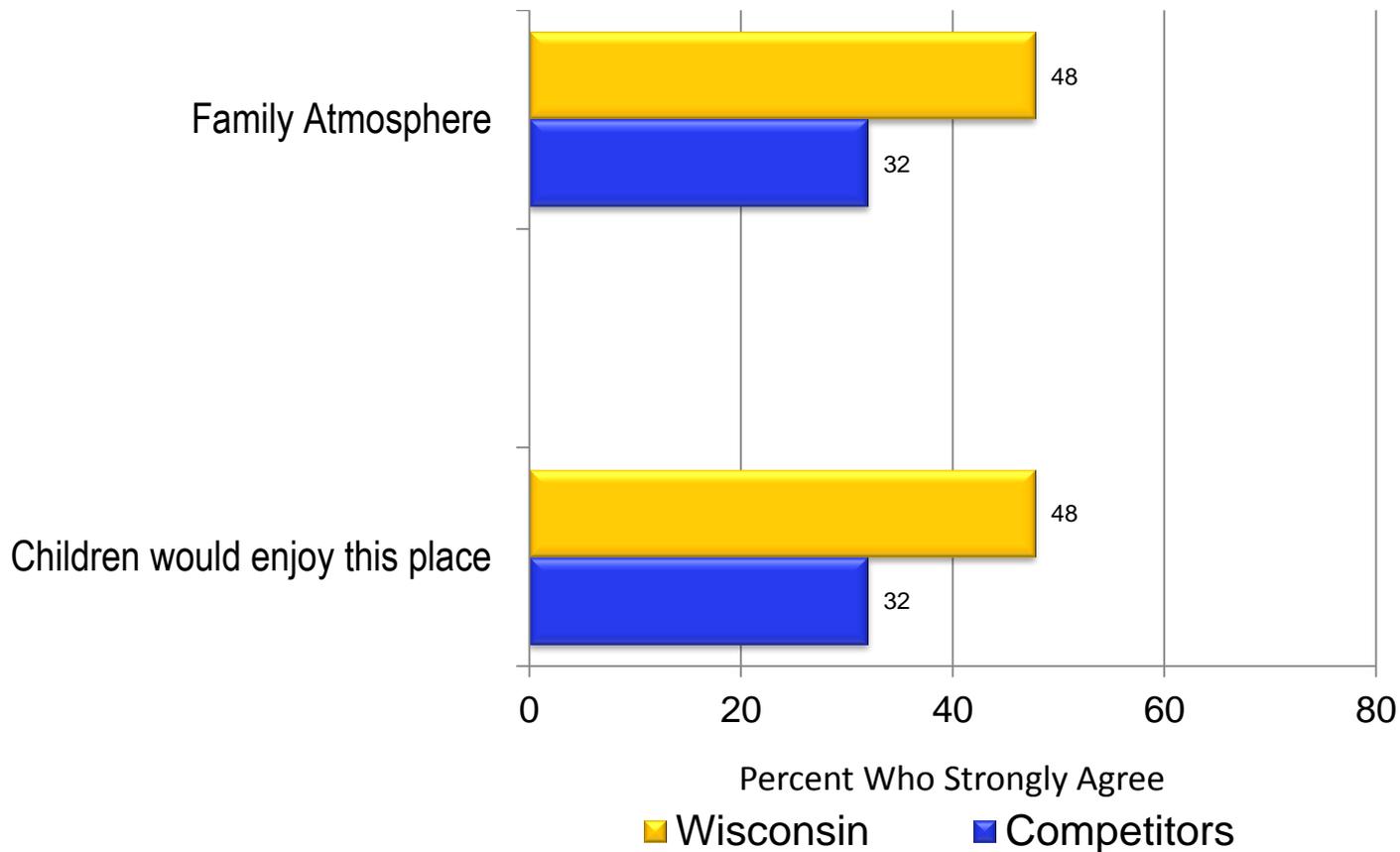
Base: Total Travelers



Wisconsin's Image vs. The Competition — Family Atmosphere



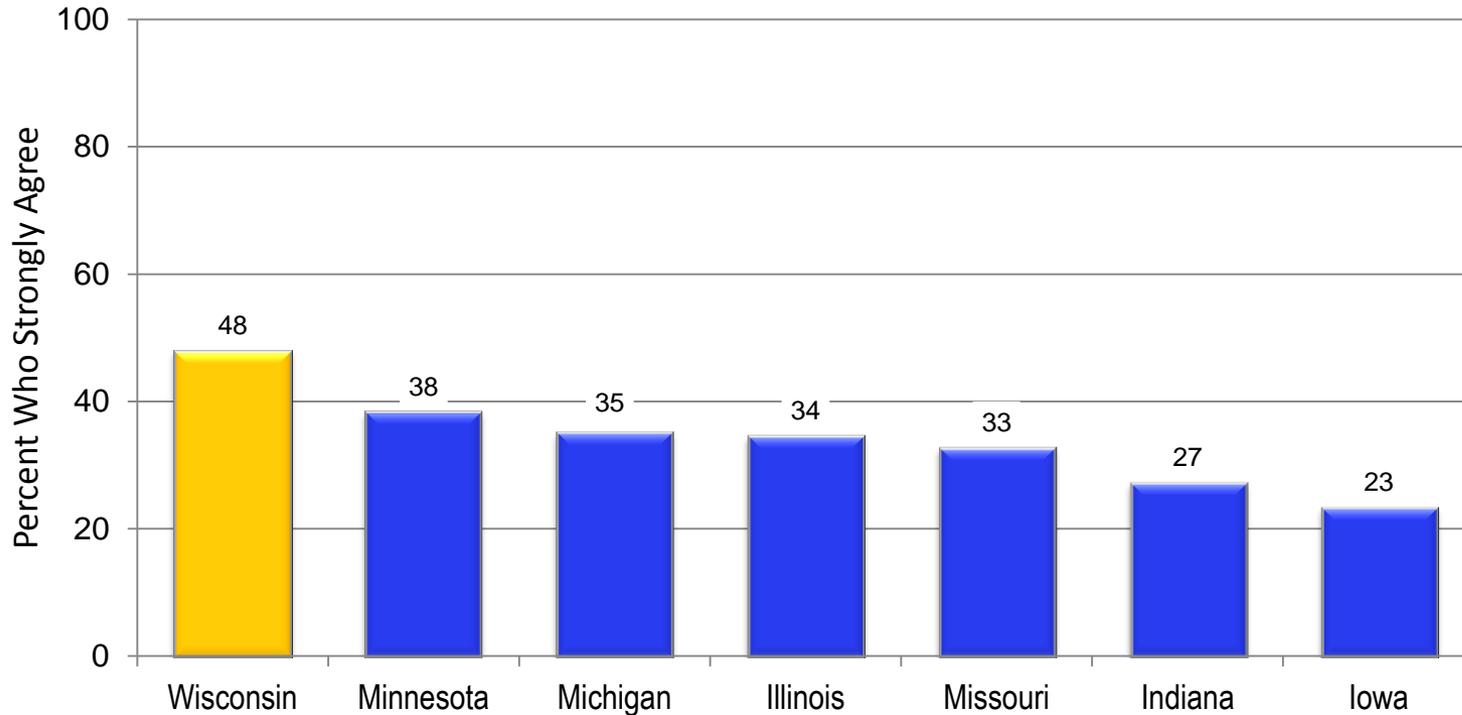
Base: Total Travelers



Wisconsin's Image vs. The Competition — Family Atmosphere



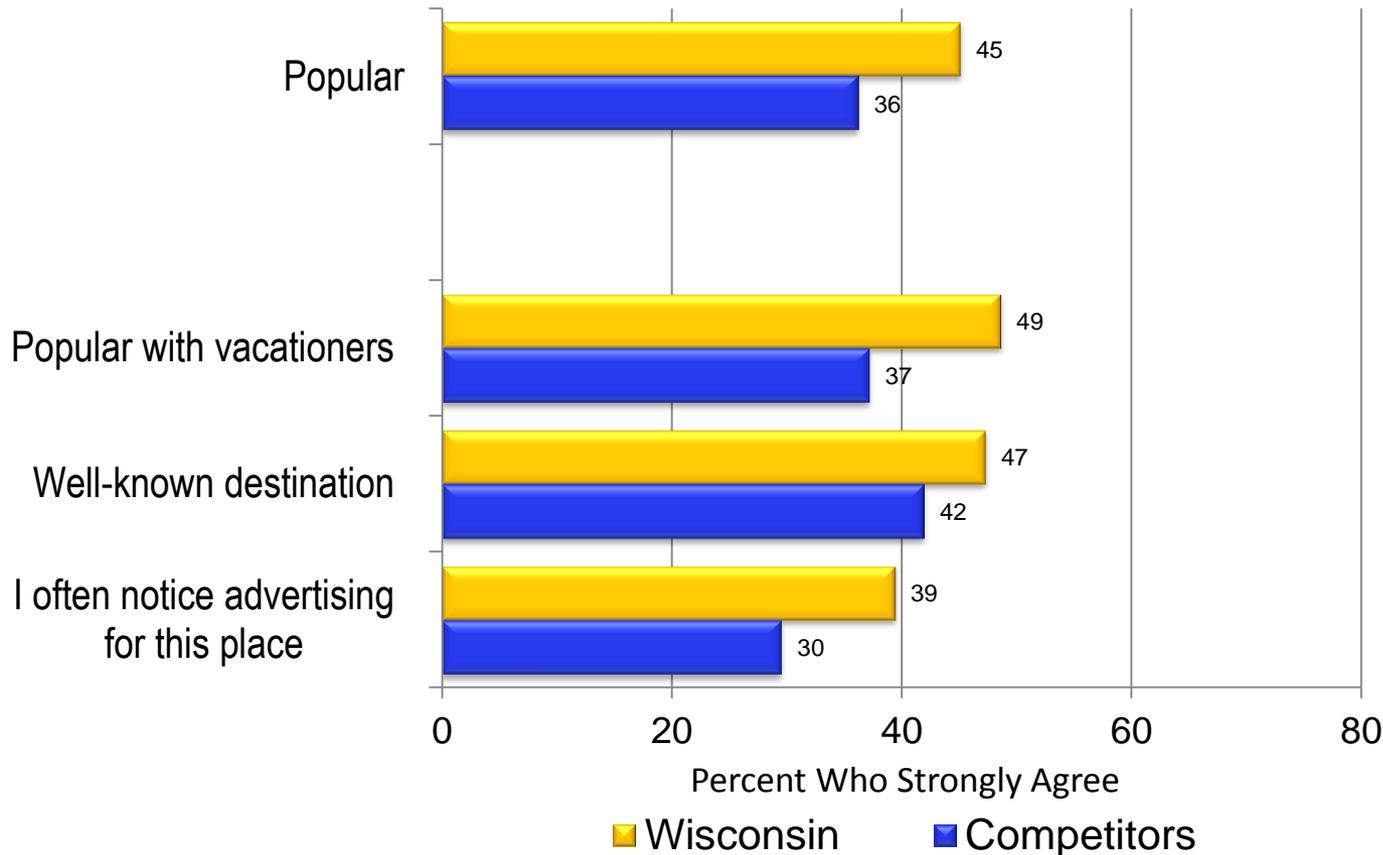
Base: Total Travelers



Wisconsin's Image vs. The Competition — Popular



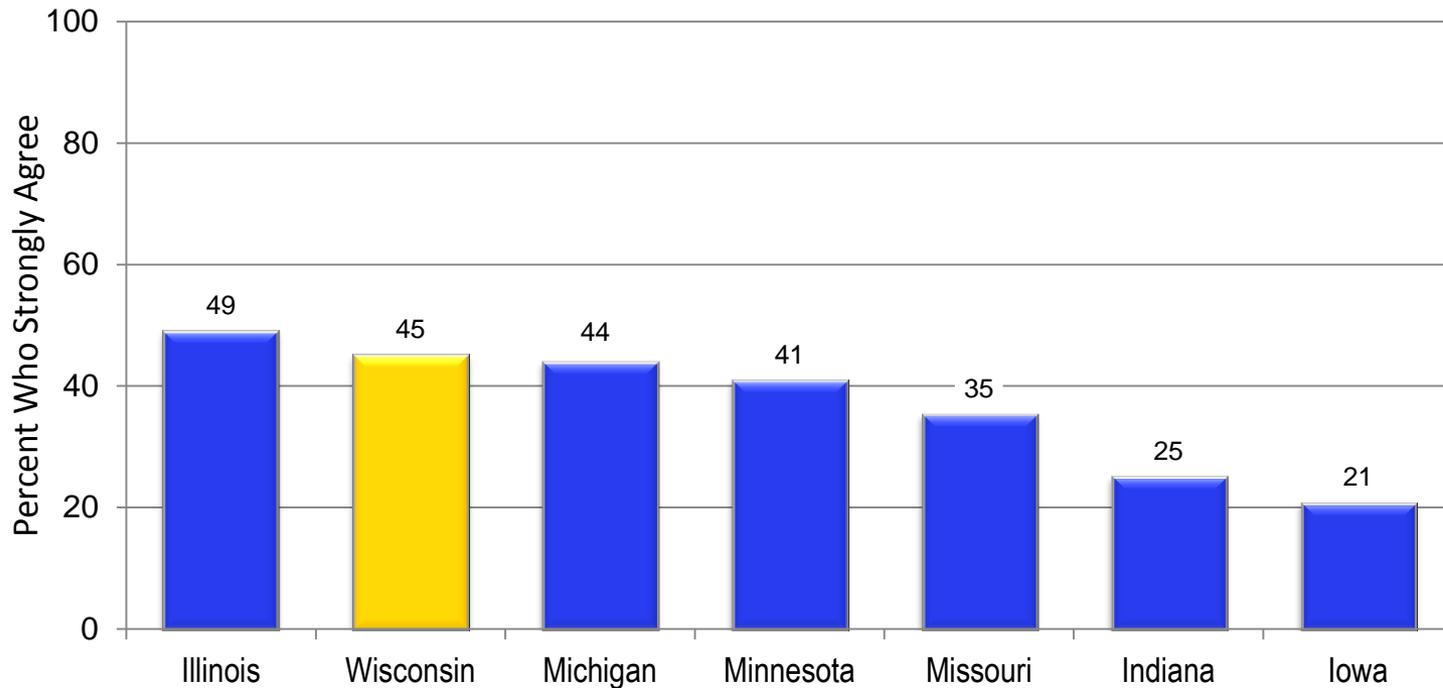
Base: Total Travelers



Wisconsin's Image vs. The Competition — Popular



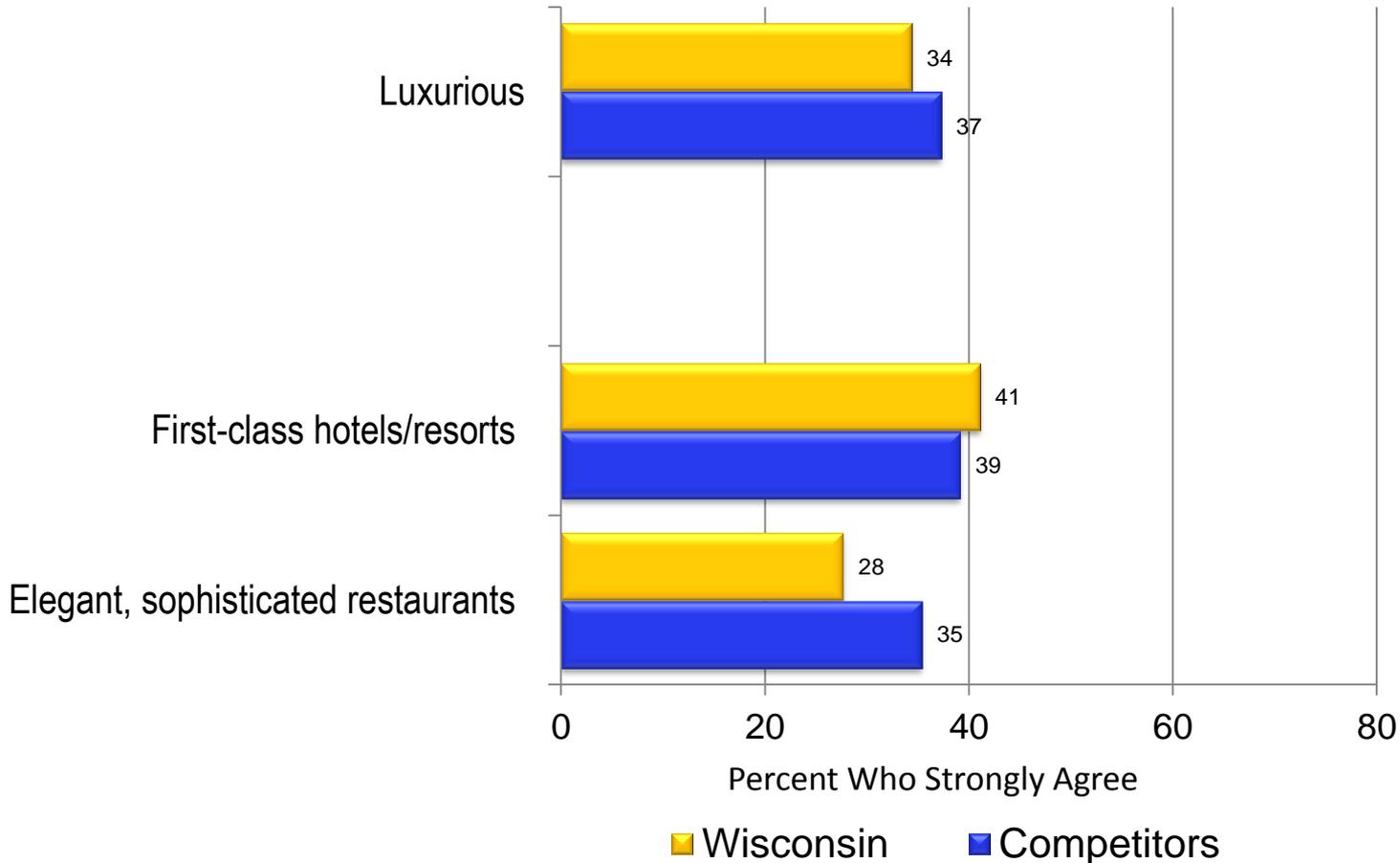
Base: Total Travelers



Wisconsin's Image vs. The Competition — Luxurious



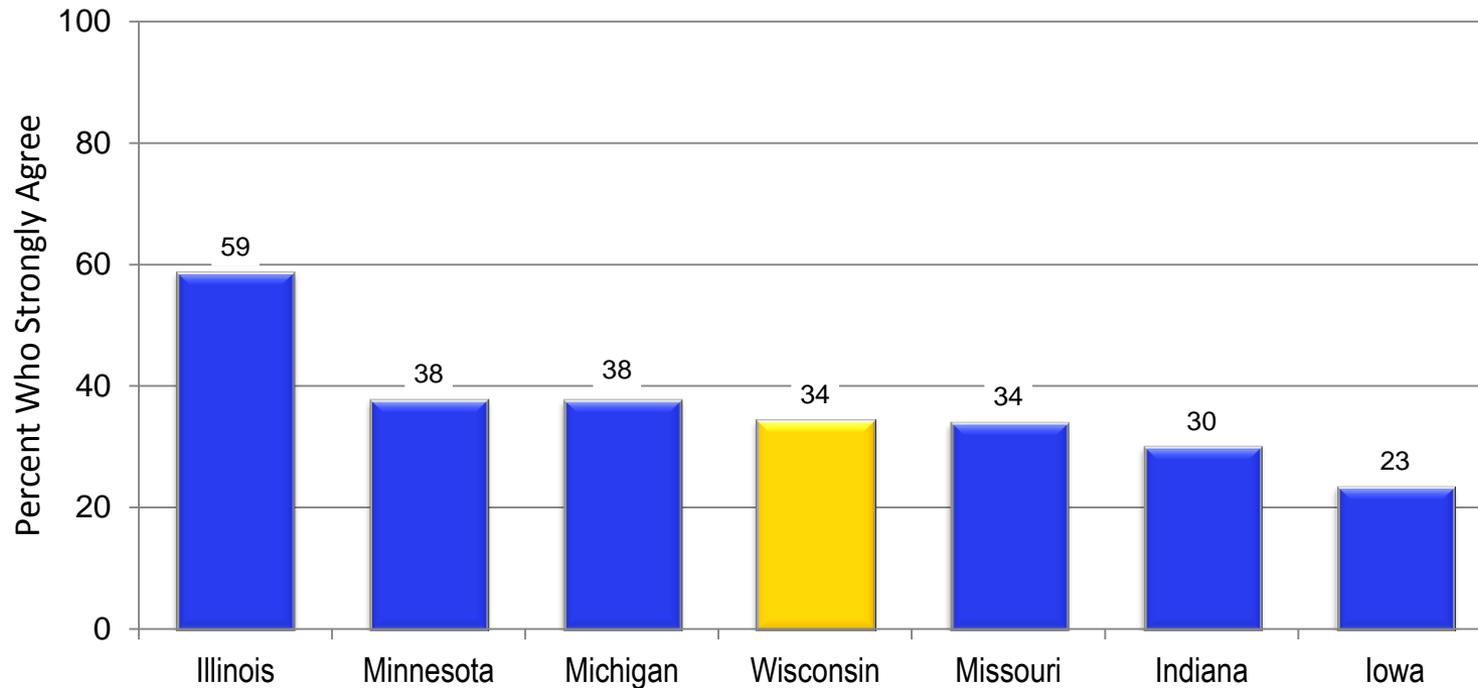
Base: Total Travelers



Wisconsin's Image vs. The Competition — Luxurious



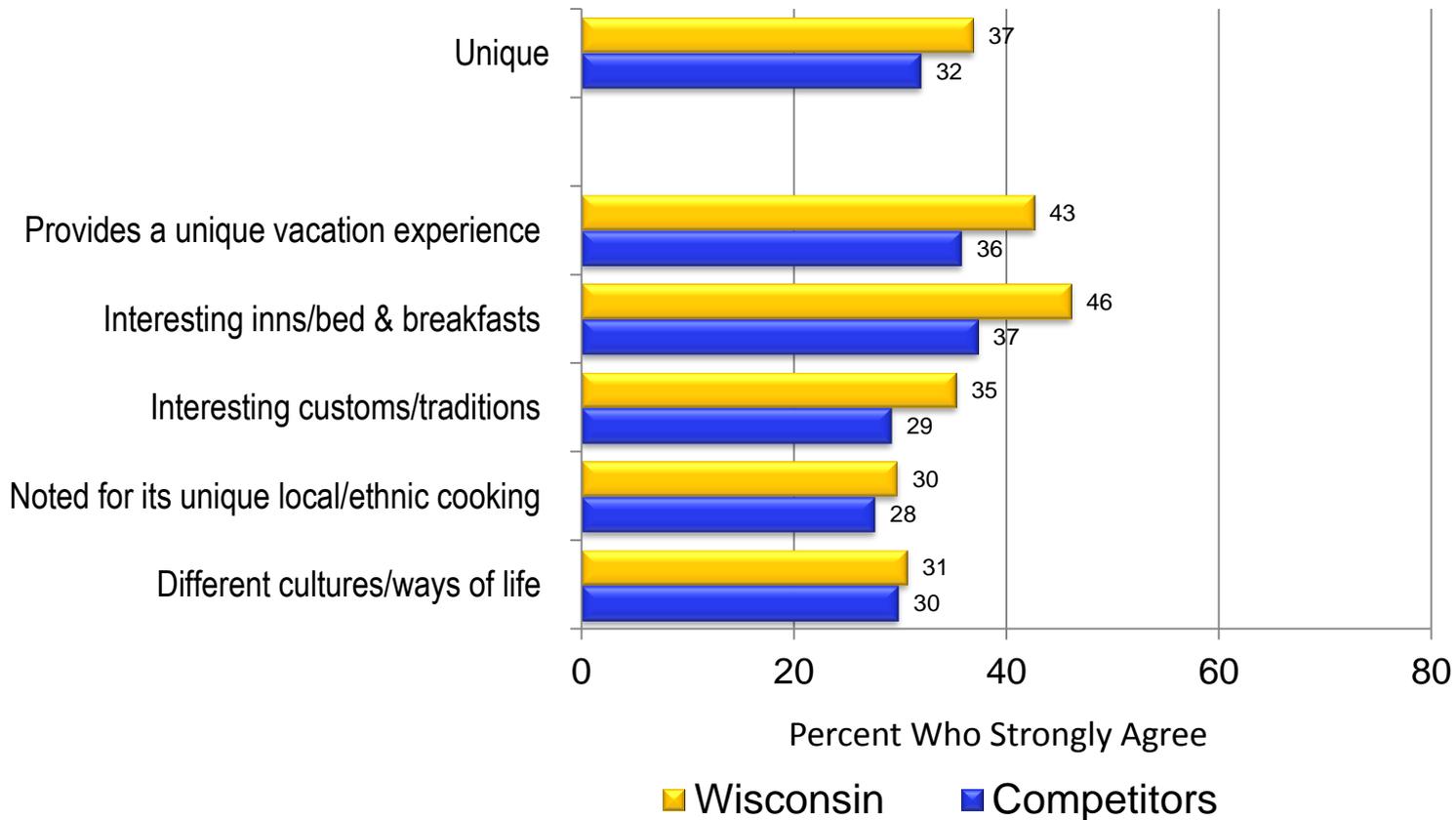
Base: Total Travelers



Wisconsin's Image vs. The Competition – Unique



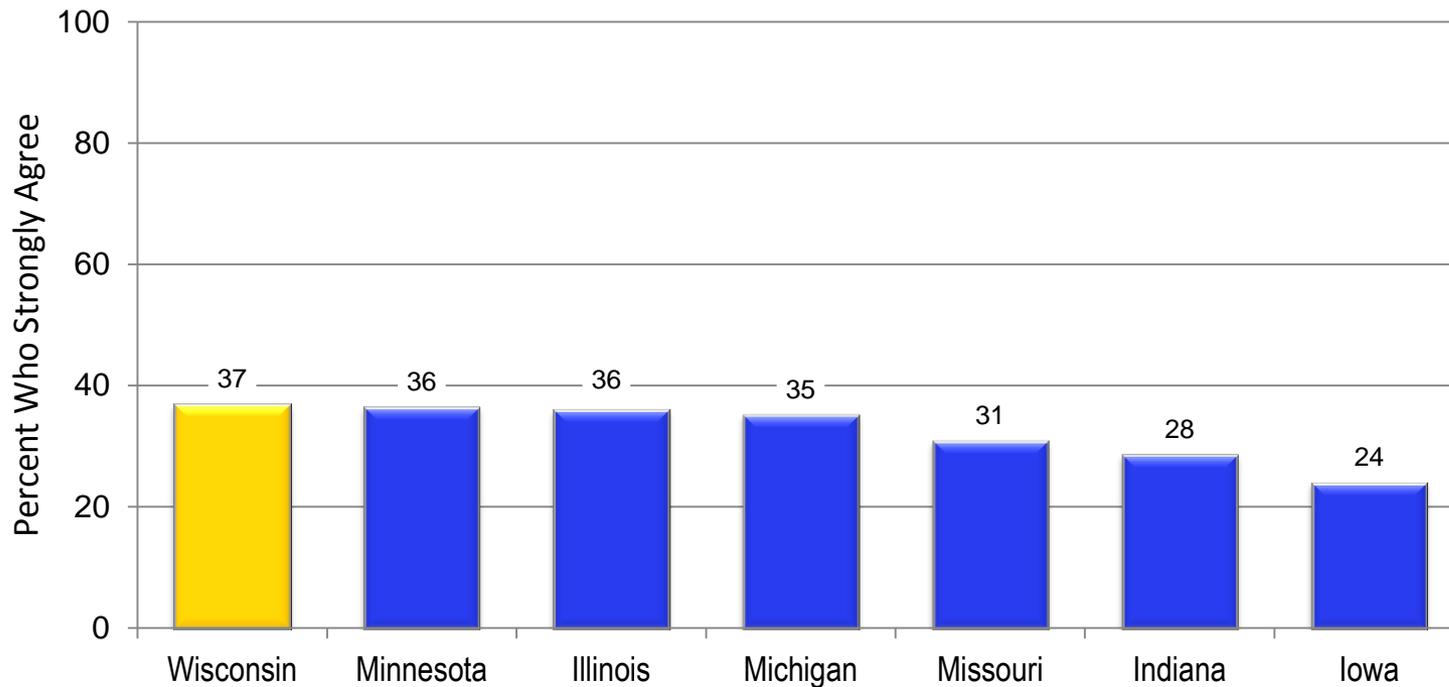
Base: Total Travelers



Wisconsin's Image vs. The Competition – Unique



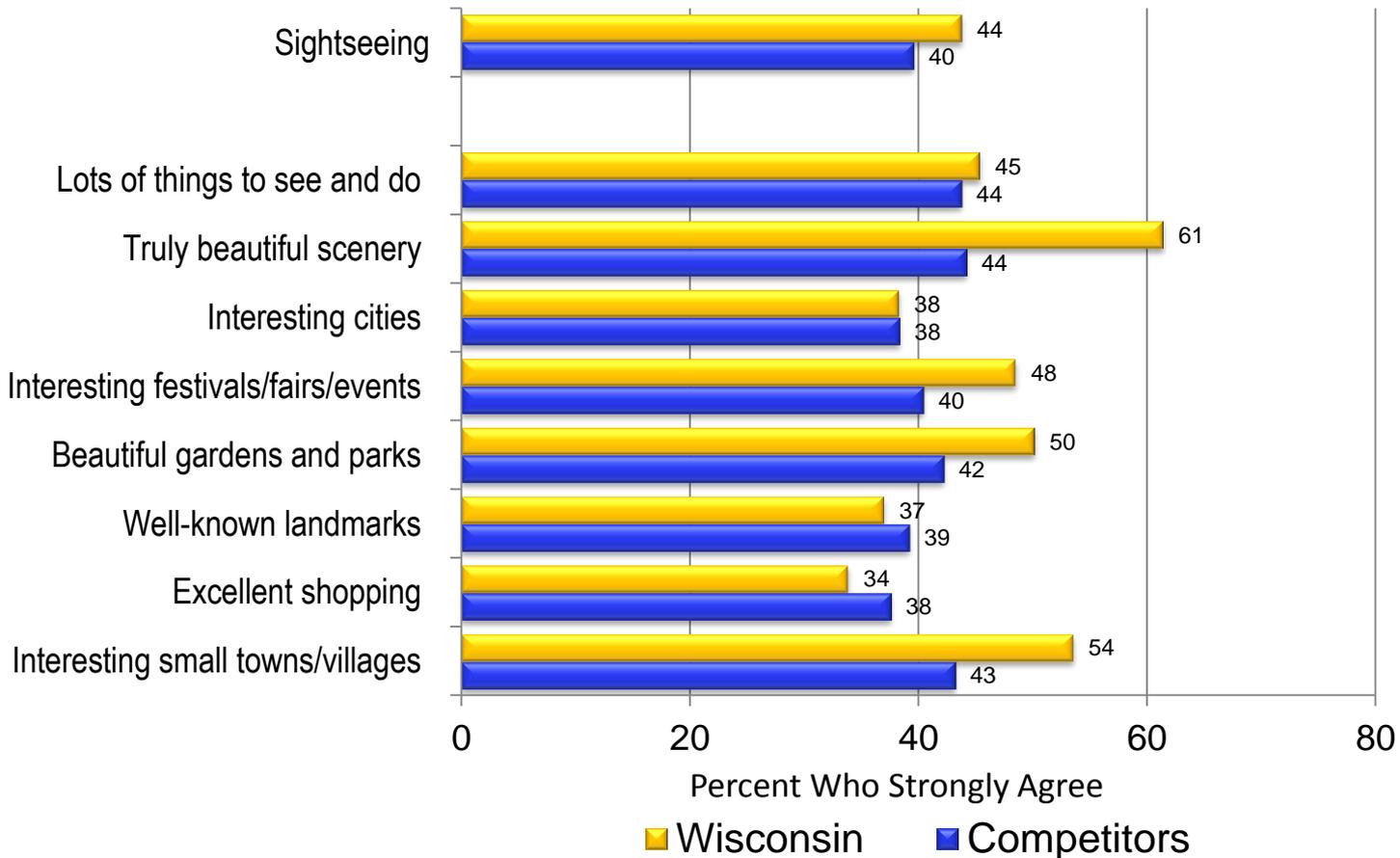
Base: Total Travelers



Wisconsin's Image vs. The Competition – Sightseeing



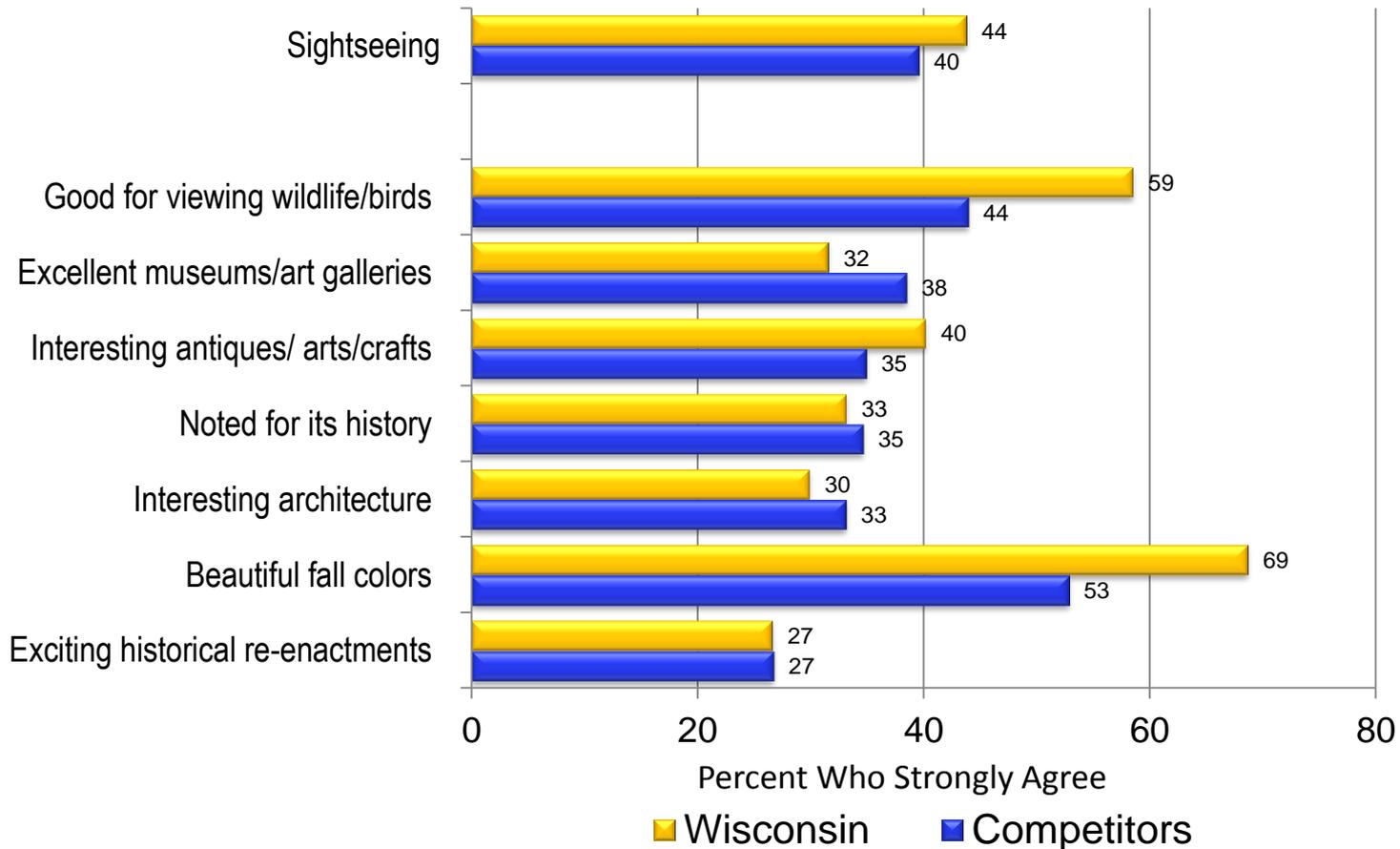
Base: Total Travelers



Wisconsin's Image vs. The Competition — Sightseeing (Cont'd)



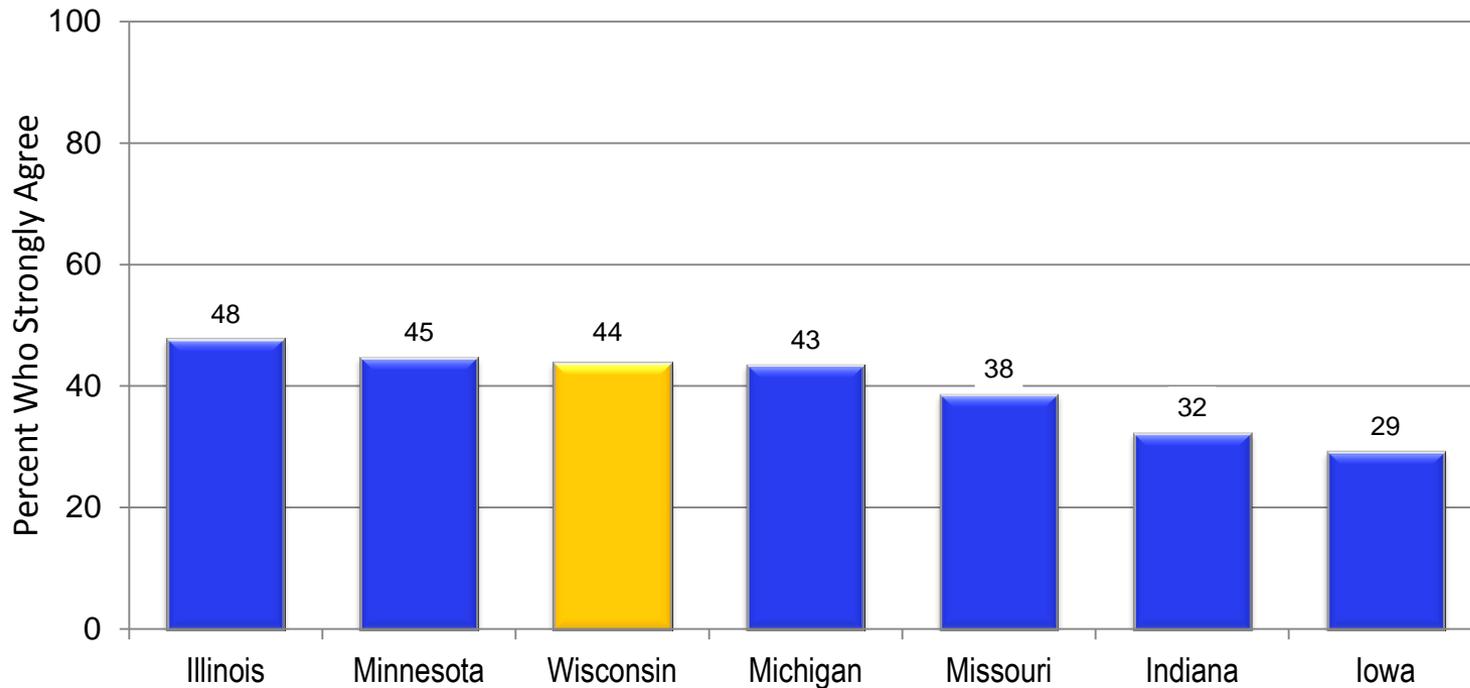
Base: Total Travelers



Wisconsin's Image vs. The Competition – Sightseeing



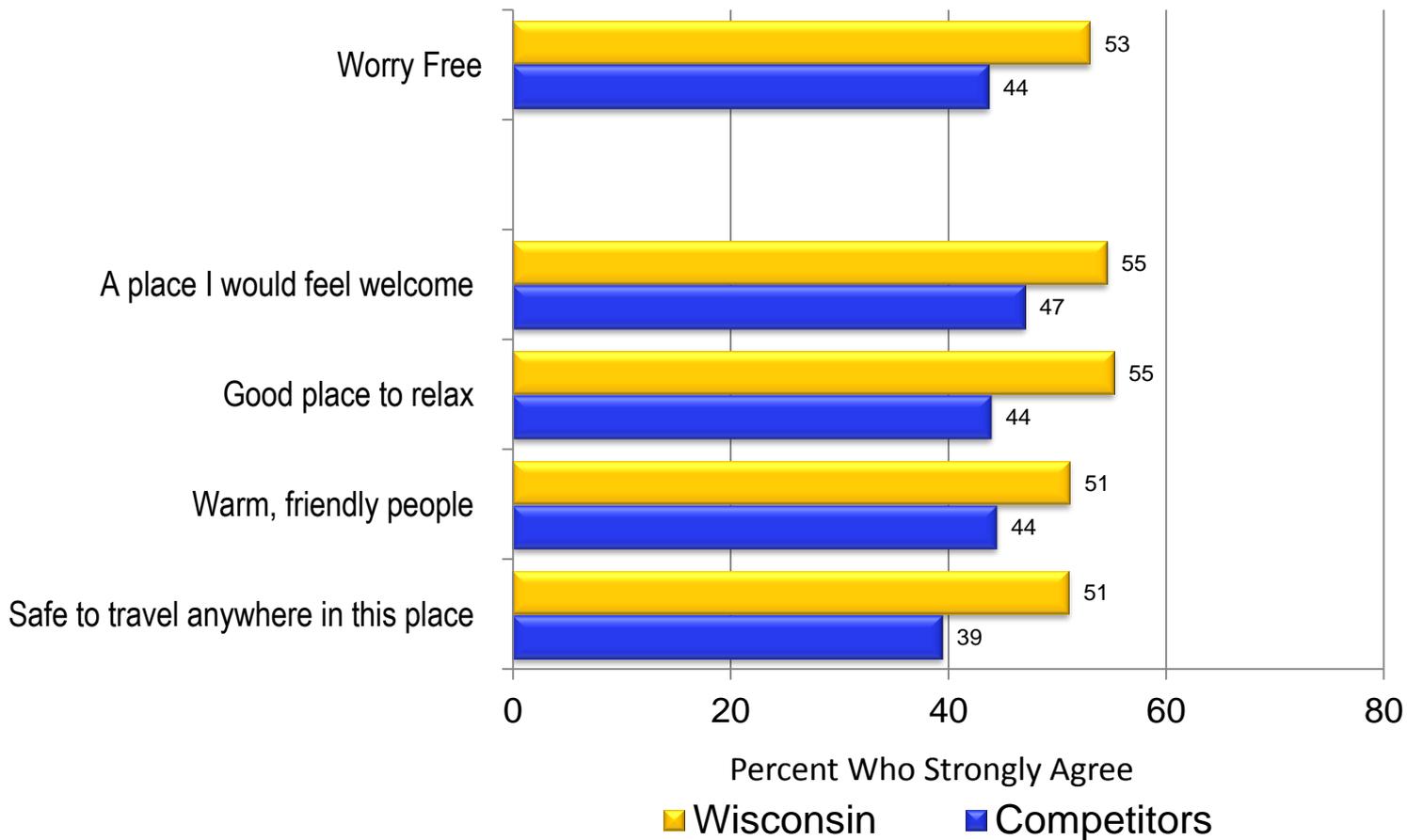
Base: Total Travelers



Wisconsin's Image vs. The Competition — Worry Free



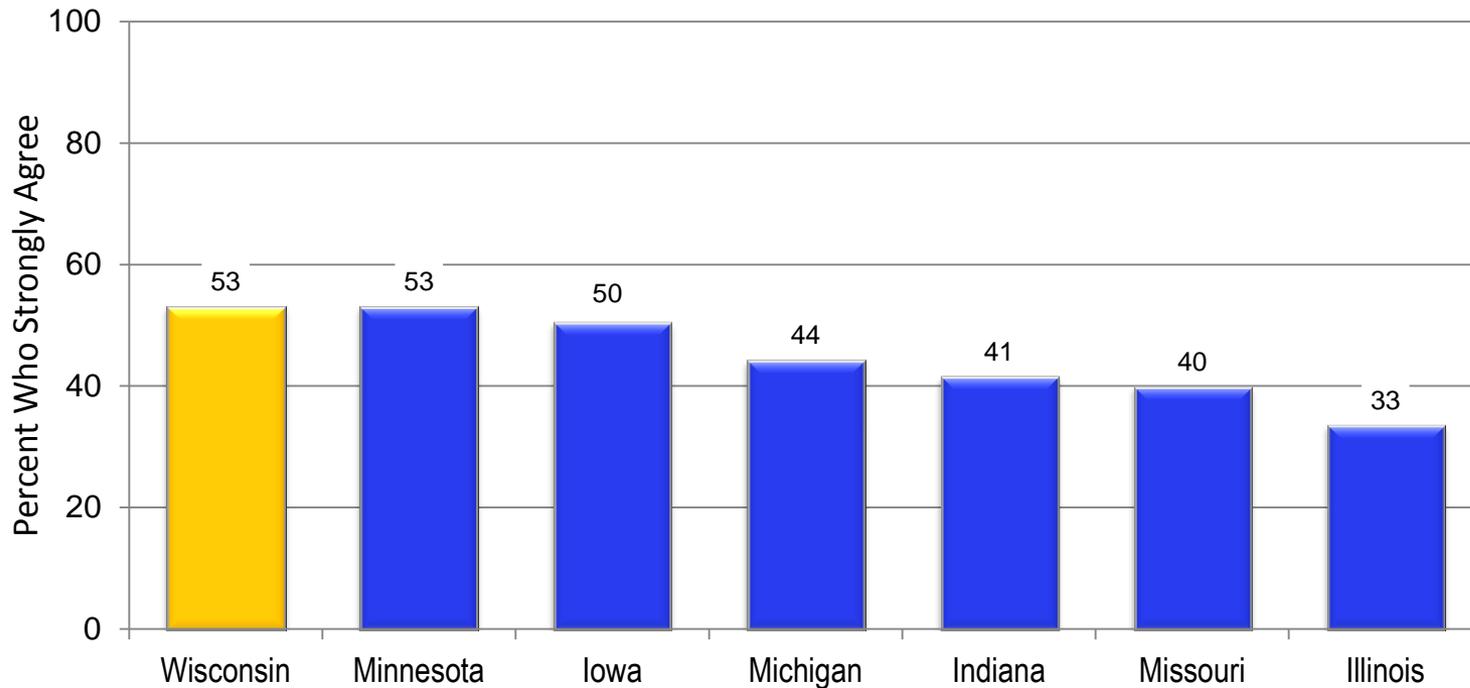
Base: Total Travelers



Wisconsin's Image vs. The Competition — Worry Free



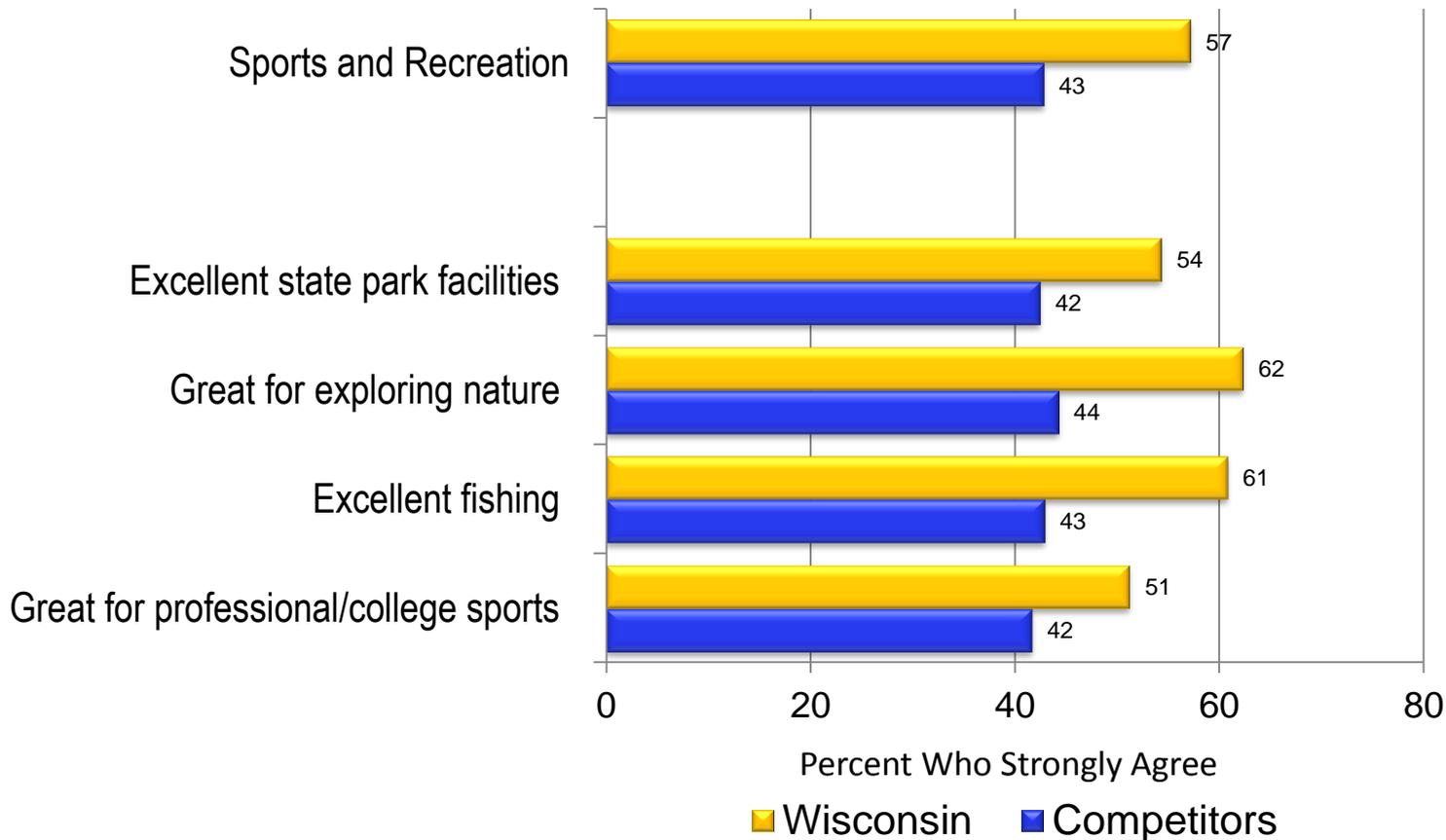
Base: Total Travelers



Wisconsin's Image vs. The Competition — Sports and Recreation



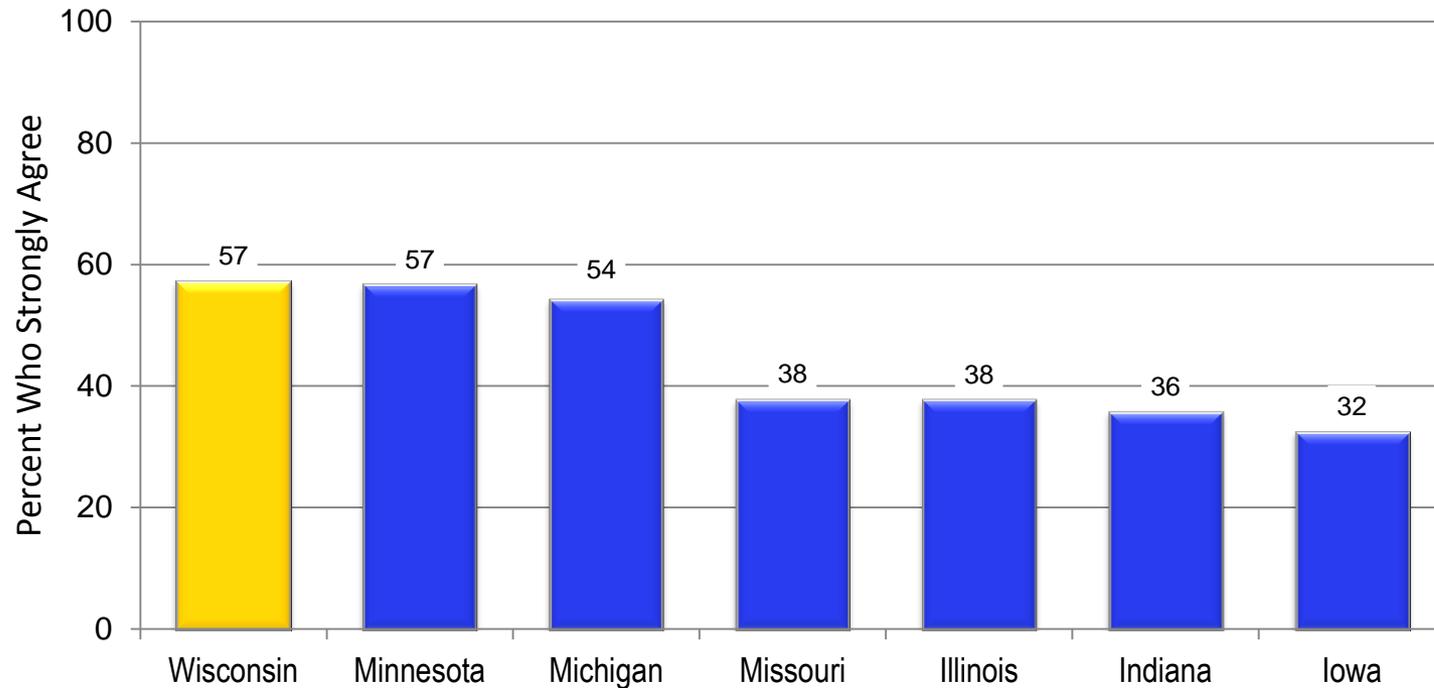
Base: Total Travelers



Wisconsin's Image vs. The Competition — Sports and Recreation



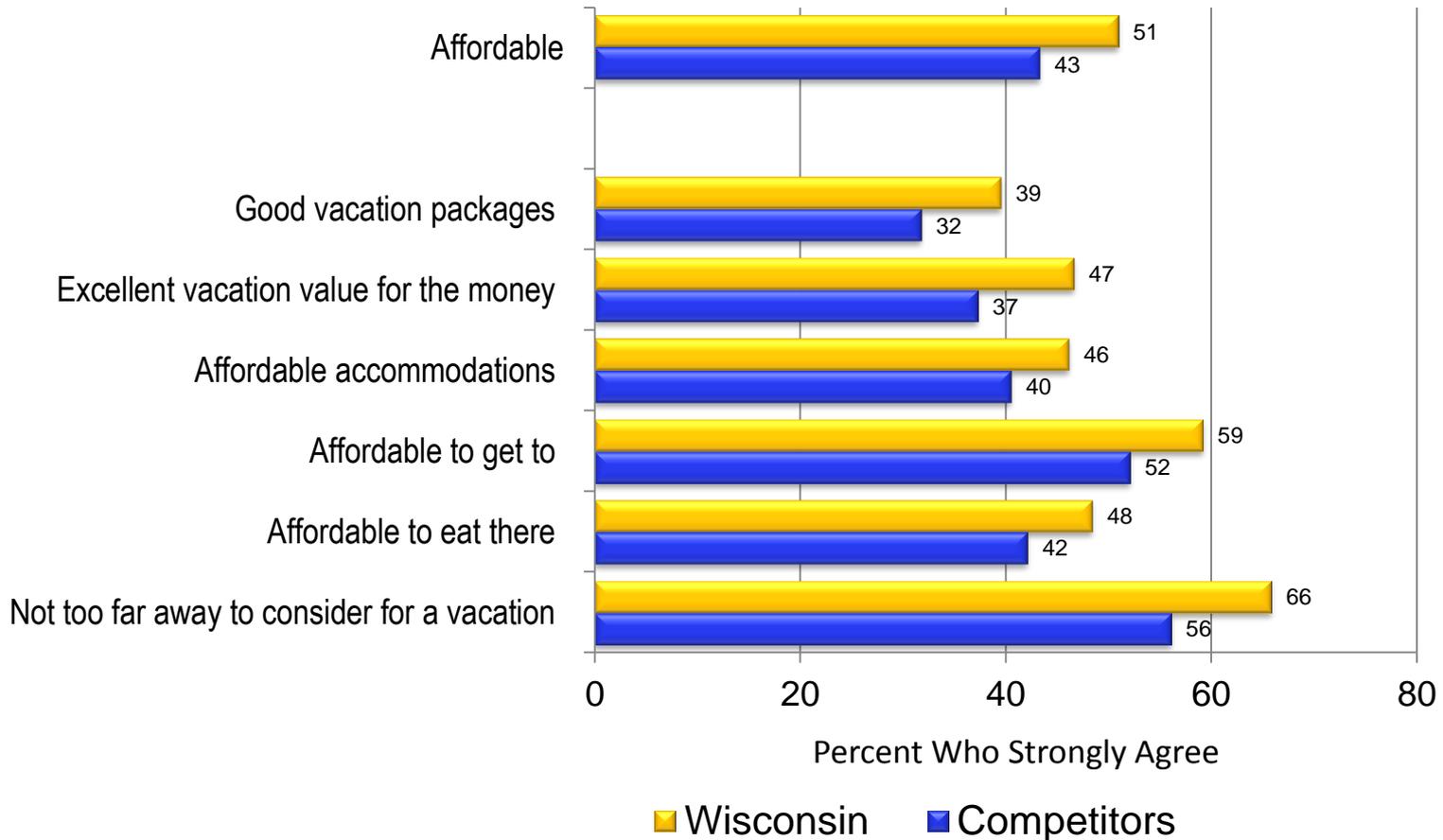
Base: Total Travelers



Wisconsin's Image vs. The Competition — Affordable



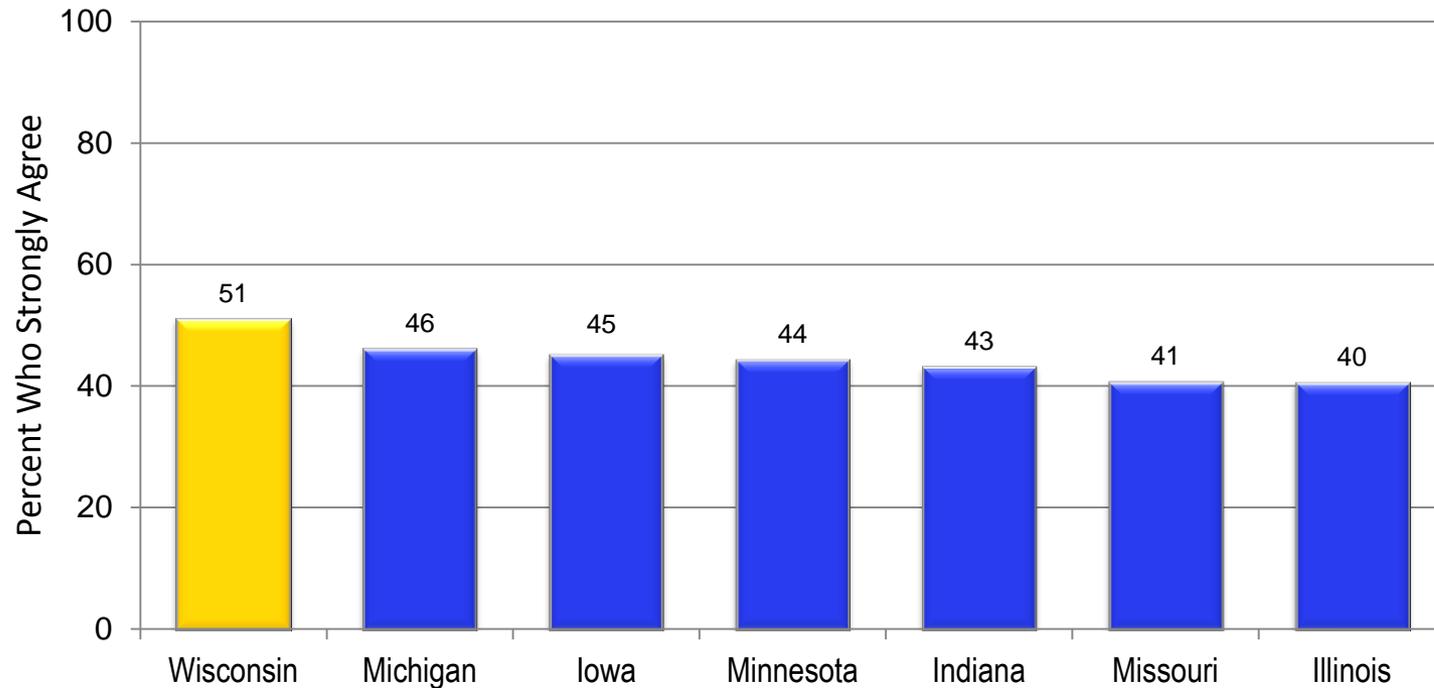
Base: Total Travelers



Wisconsin's Image vs. The Competition — Affordable



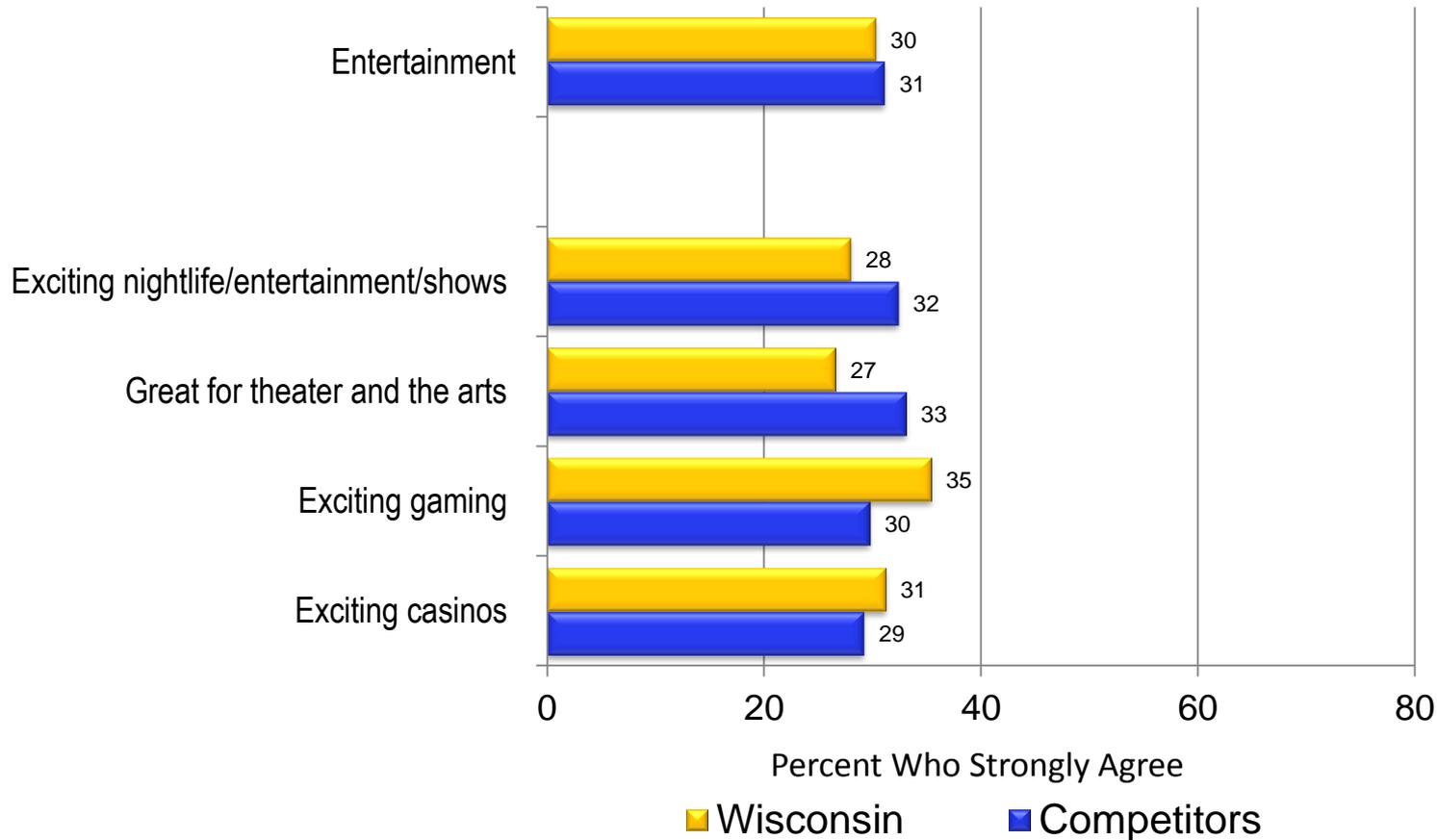
Base: Total Travelers



Wisconsin's Image vs. The Competition — Entertainment



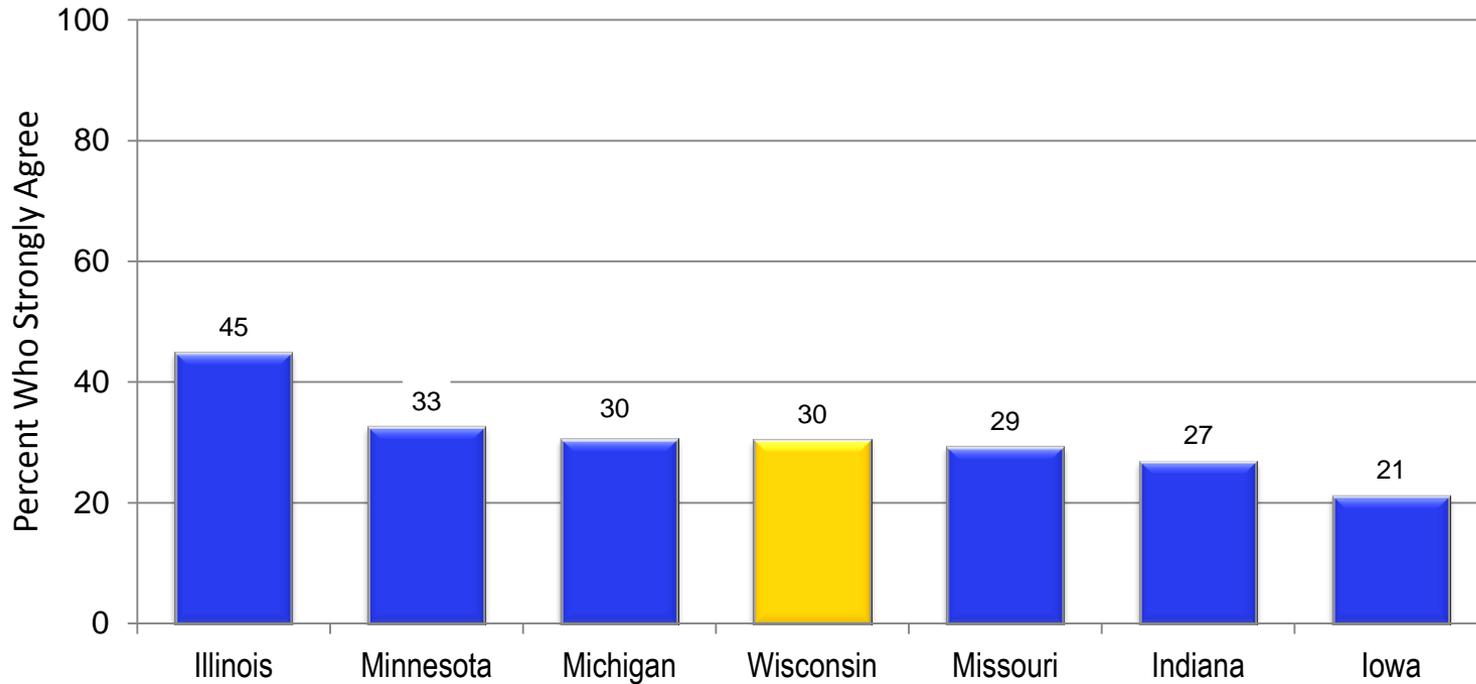
Base: Total Travelers



Wisconsin's Image vs. The Competition — Entertainment



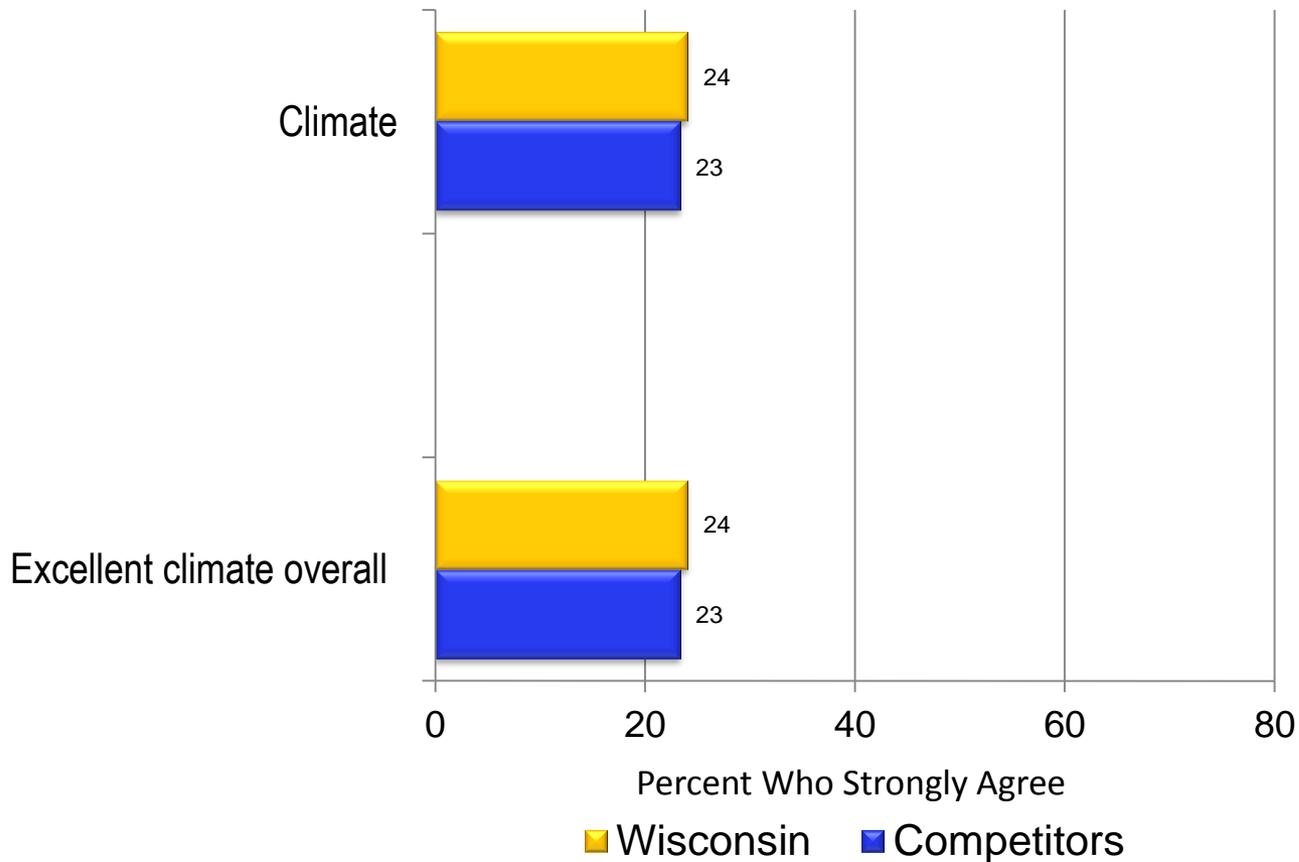
Base: Total Travelers



Wisconsin's Image vs. The Competition – Climate



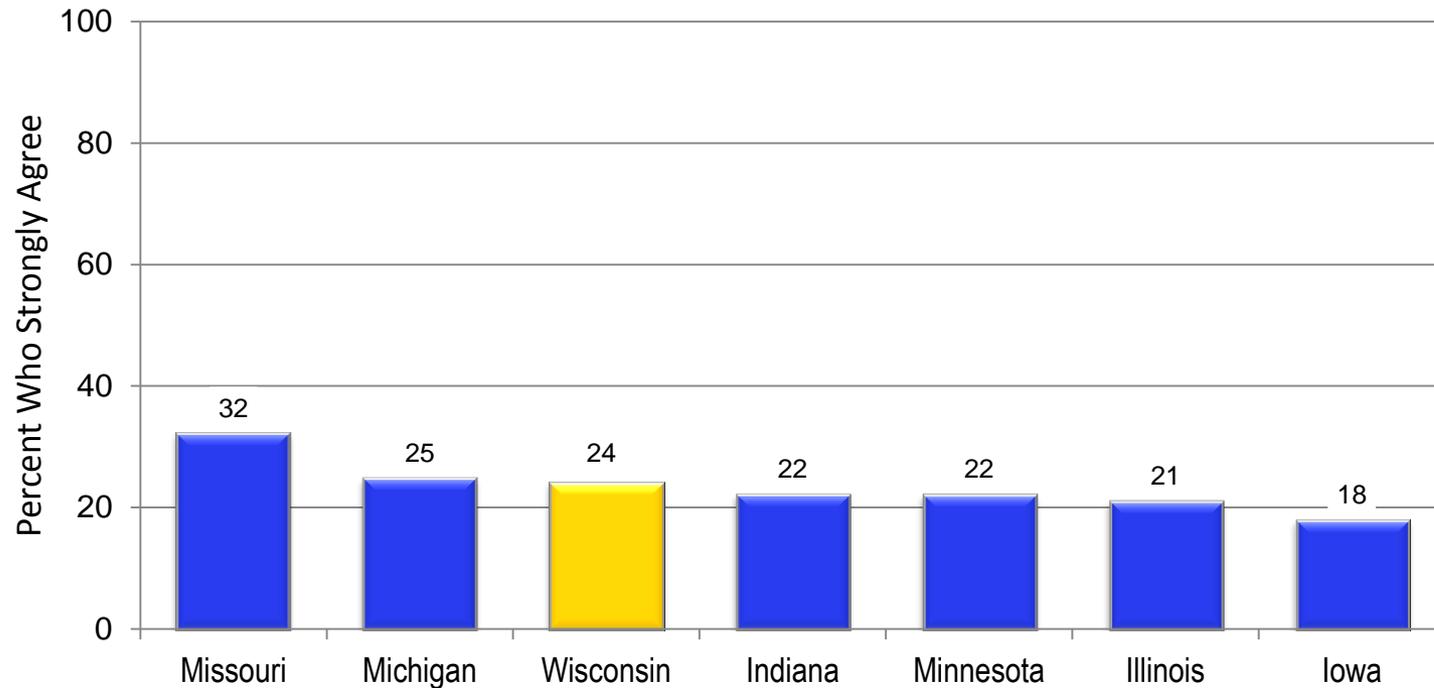
Base: Total Travelers



Wisconsin's Image vs. The Competition – Climate



Base: Total Travelers



Wisconsin's Image
Strengths and Weaknesses
vs. the competition

Wisconsin's Competitive Position

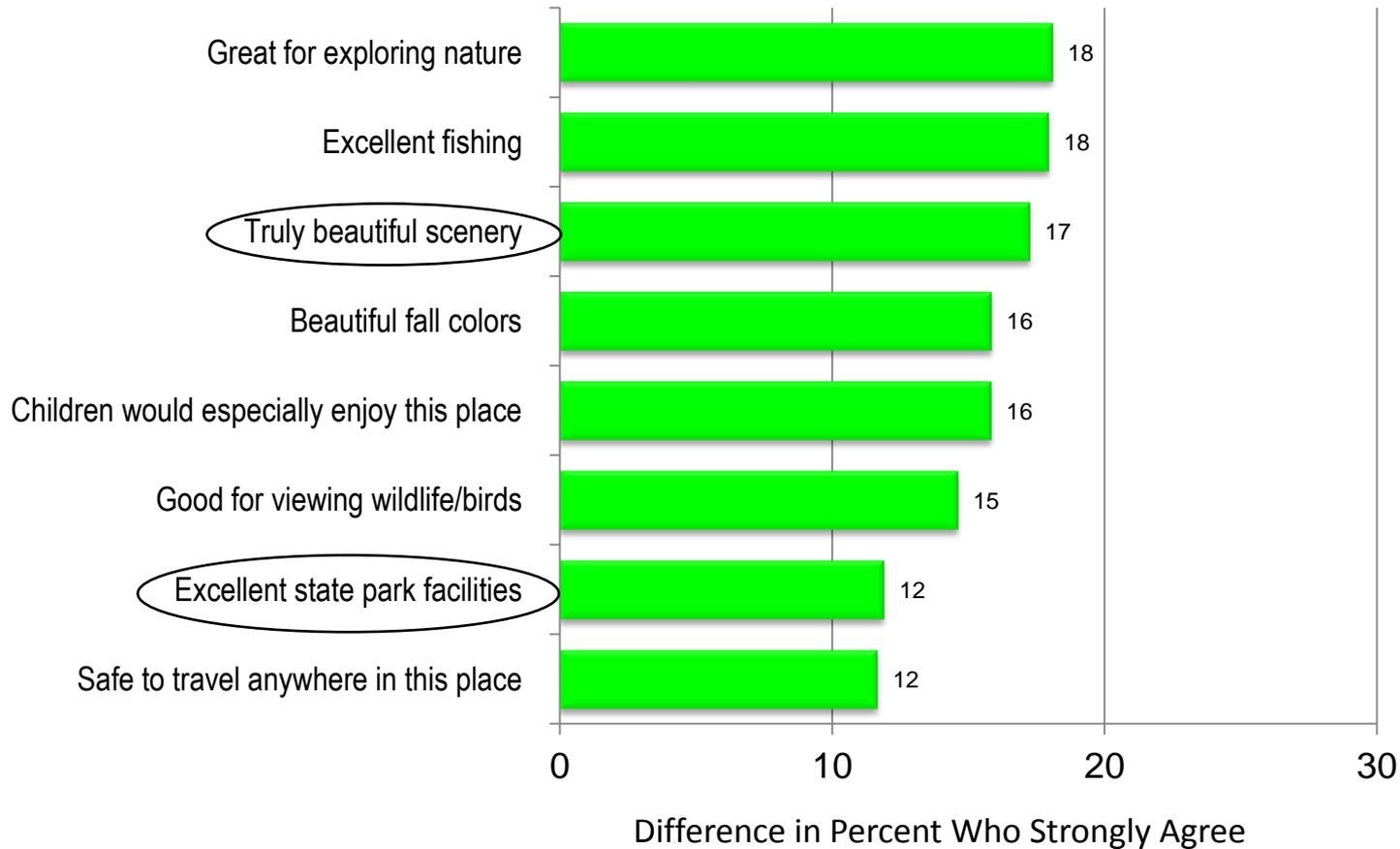


- **Competitive strengths** are revealed in those attributes where ratings are appreciably **higher** than those of competitors.
- Wisconsin's competitive strengths include five of the ten hot buttons. They are most focused in outdoor and nature based activities:
 - *Exploring nature*
 - *Fishing*
 - *Truly beautiful scenery*
 - *Beautiful fall colors*
 - *A destination children would especially enjoy*
 - *Good for viewing wildlife/birds*
- Its competitive weaknesses are in the big-city attractions such as theater, arts and elegant restaurants,

Wisconsin's Image Strengths vs. the Competition



Base: Total Travelers



Circled attributes are some of the most important image hot buttons for travelers

Wisconsin's Image Strengths vs. the Competition (Cont'd)



Base: Total Travelers

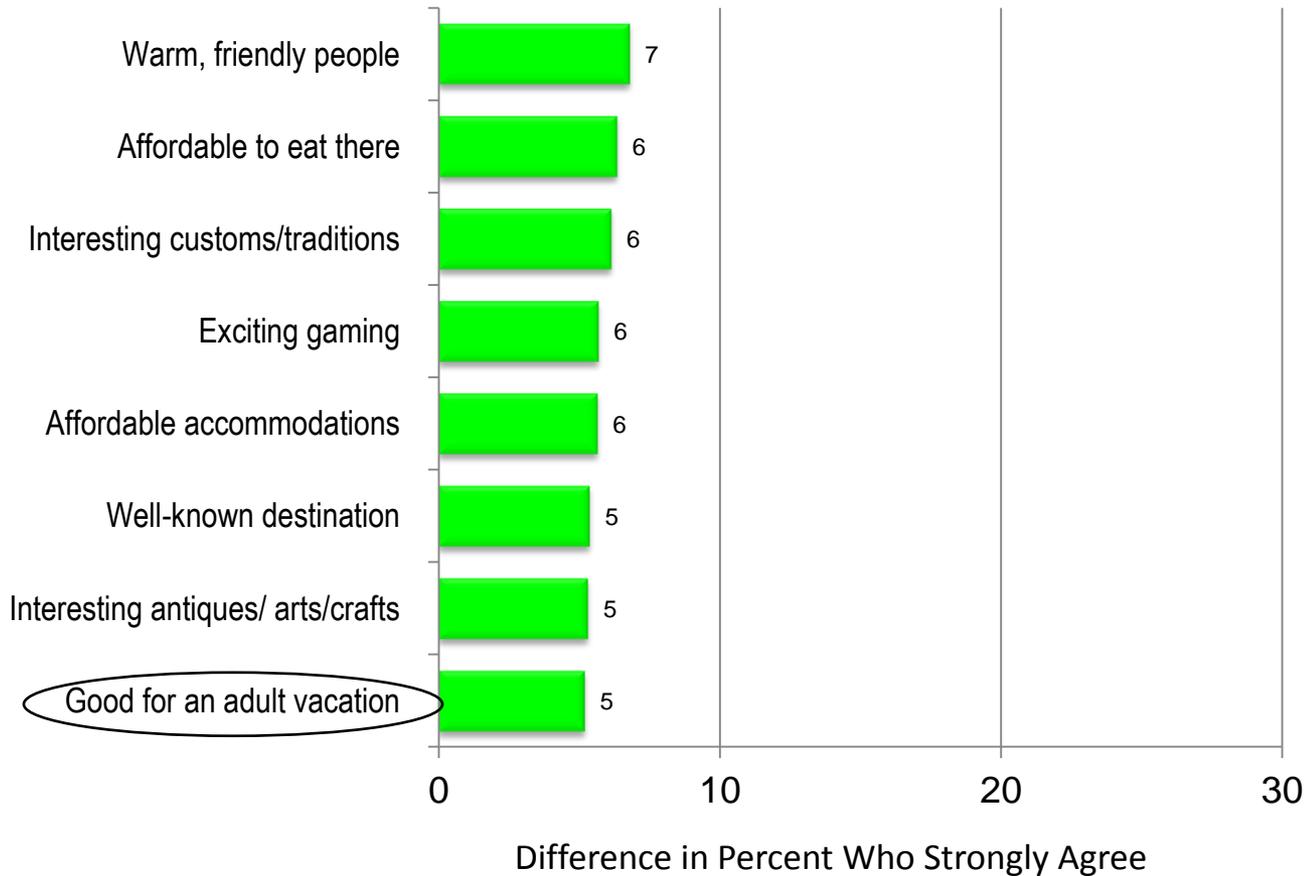


Circled attributes are some of the most important image hot buttons for travelers

Wisconsin's Image Strengths vs. the Competition (Cont'd)



Base: Total Travelers

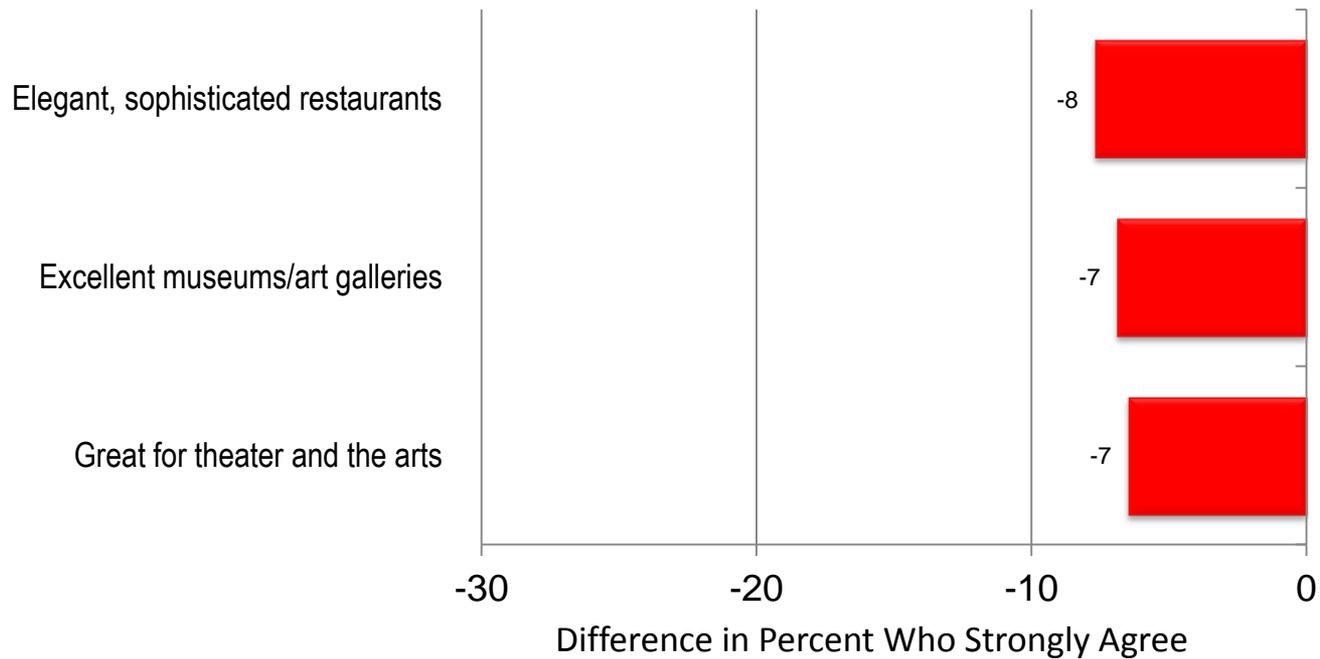


Circled attributes are some of the most important image hot buttons for travelers

Wisconsin's Image Weakness vs. the Competition



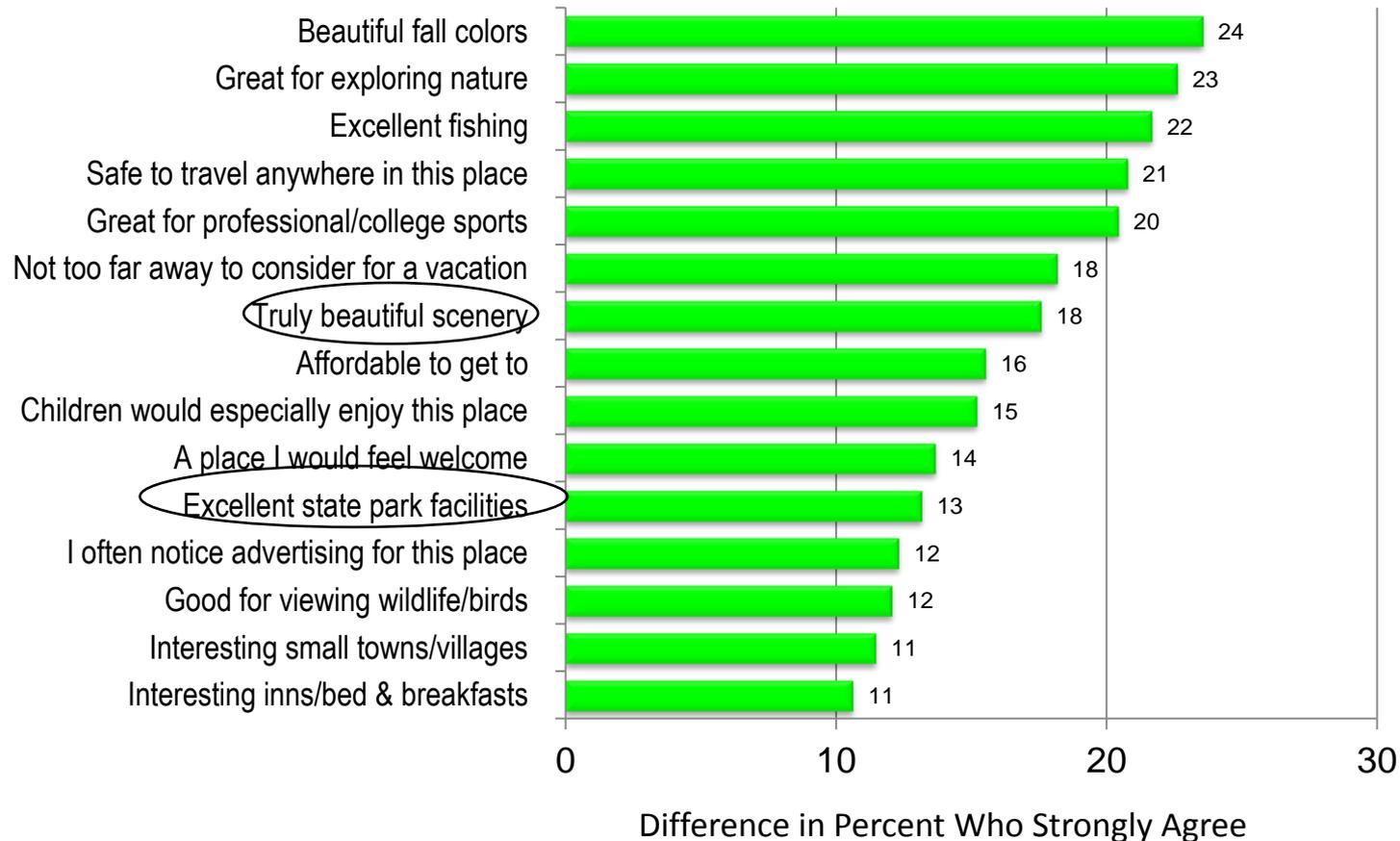
Base: Total Travelers



Wisconsin's Image Strengths vs. Missouri



Base: Total Travelers

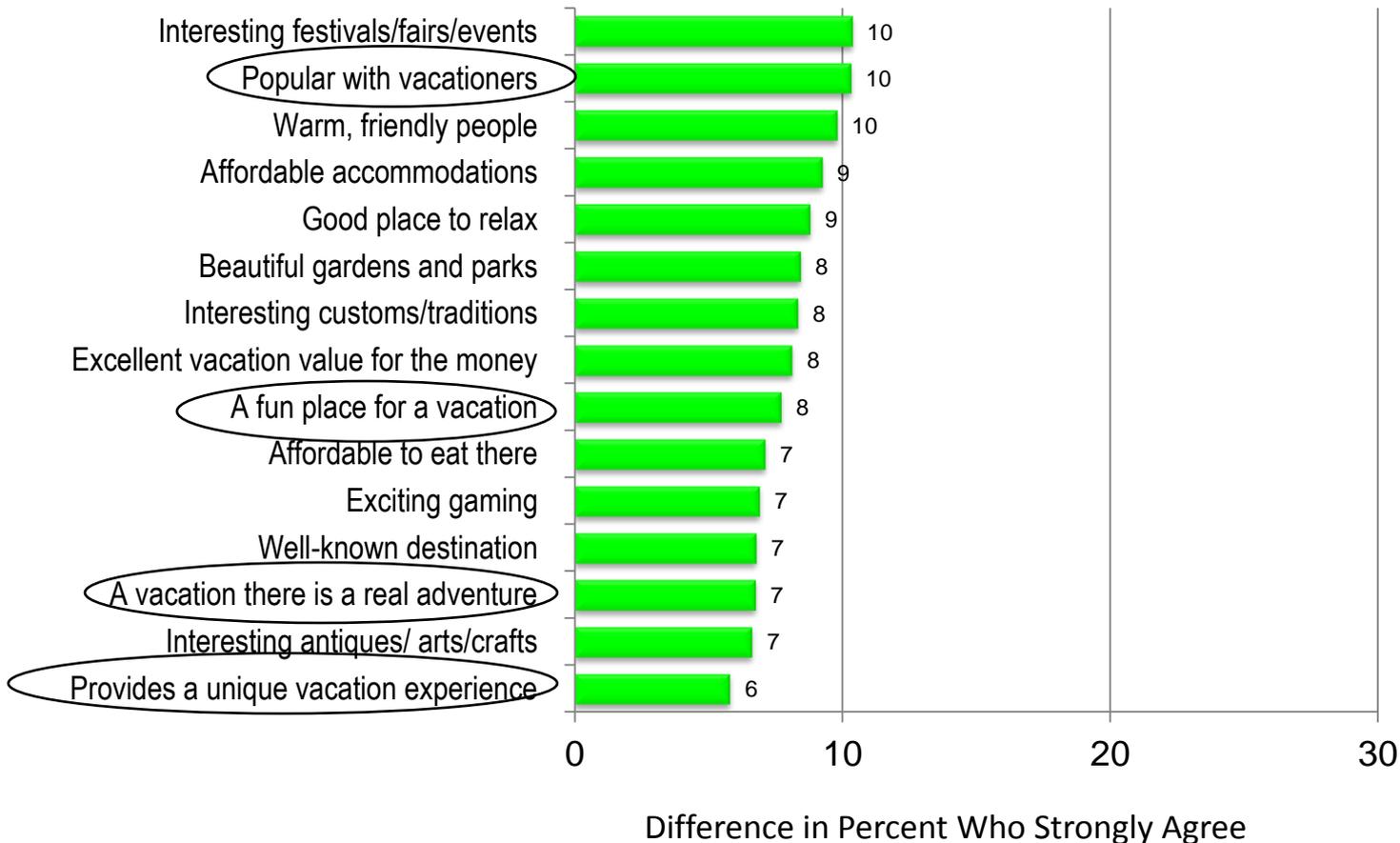


Circled attributes are some of the most important image hot buttons for travelers

Wisconsin's Image Strengths vs. Missouri (Cont'd)



Base: Total Travelers

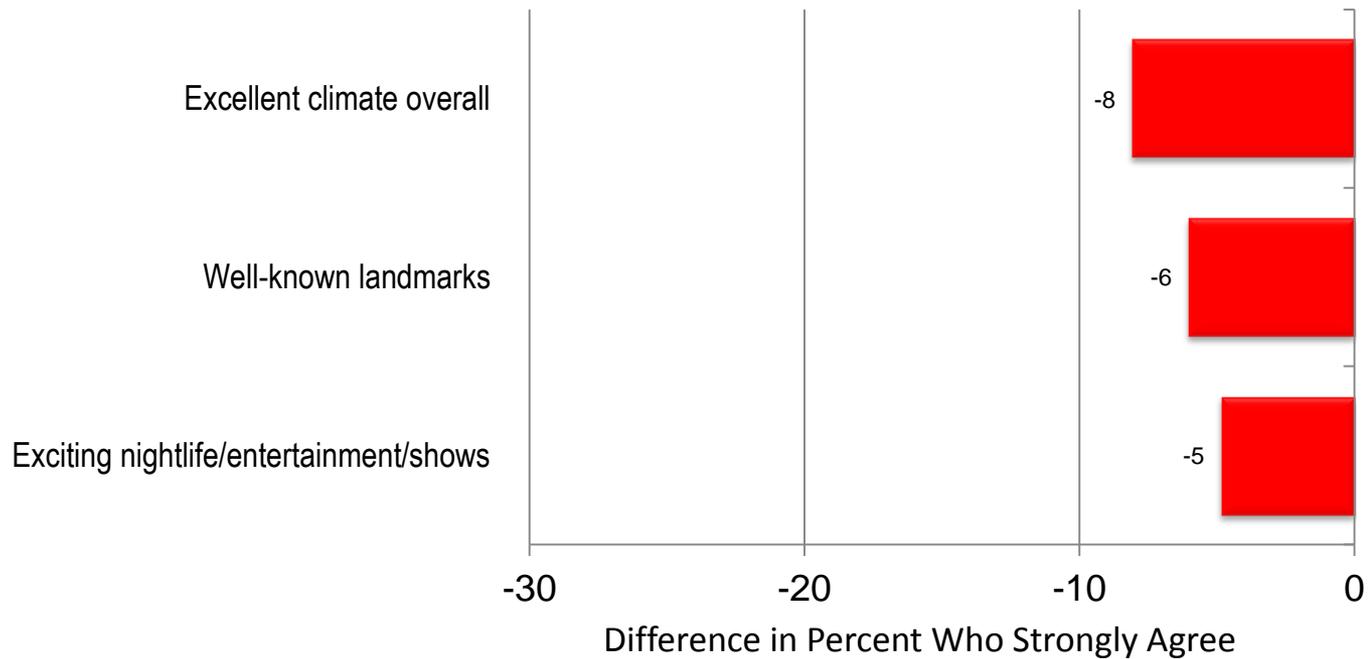


Circled attributes are some of the most important image hot buttons for travelers

Wisconsin's Image Weaknesses vs. Missouri



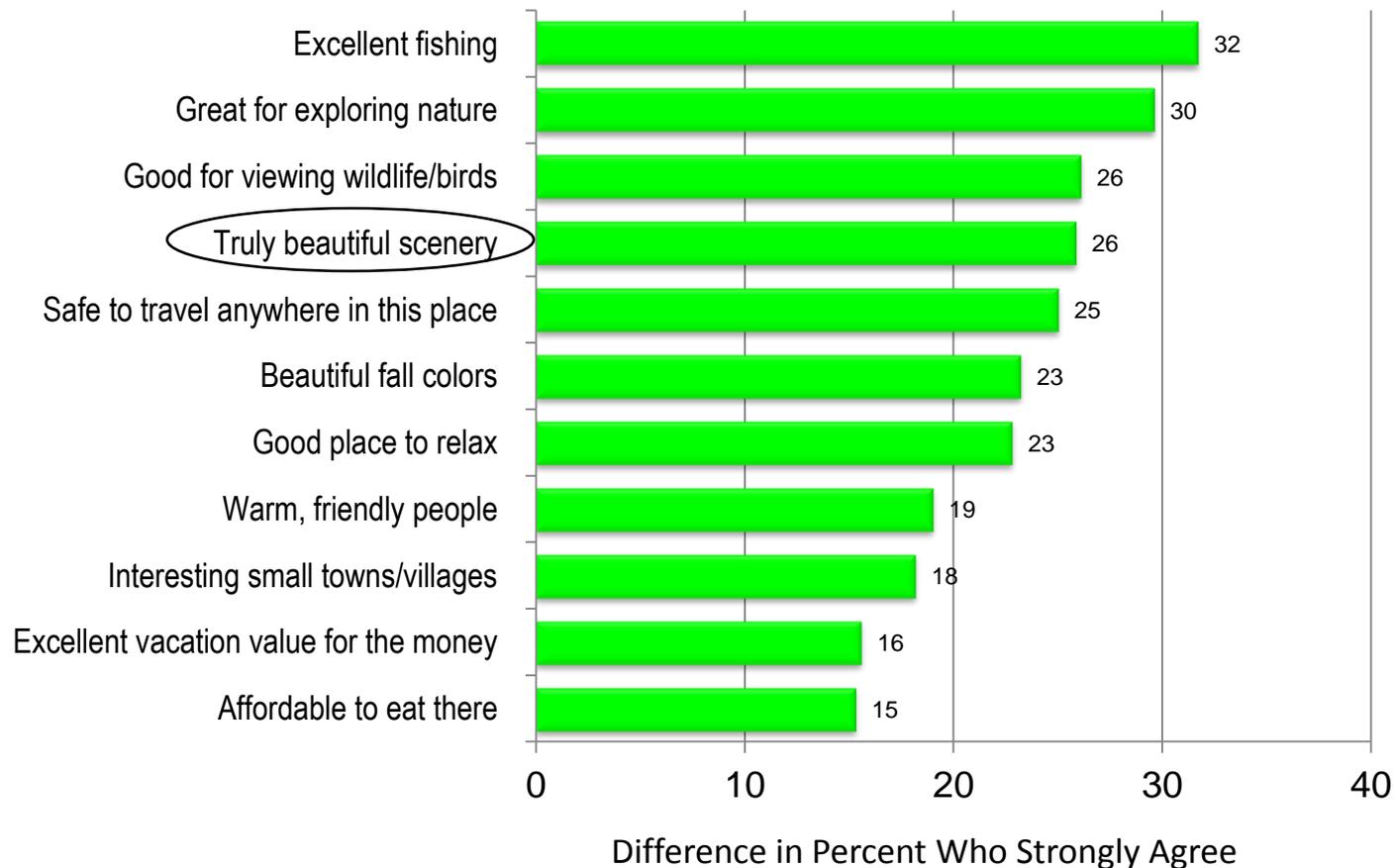
Base: Total Travelers



Wisconsin's Image Strengths vs. Illinois



Base: Total Travelers

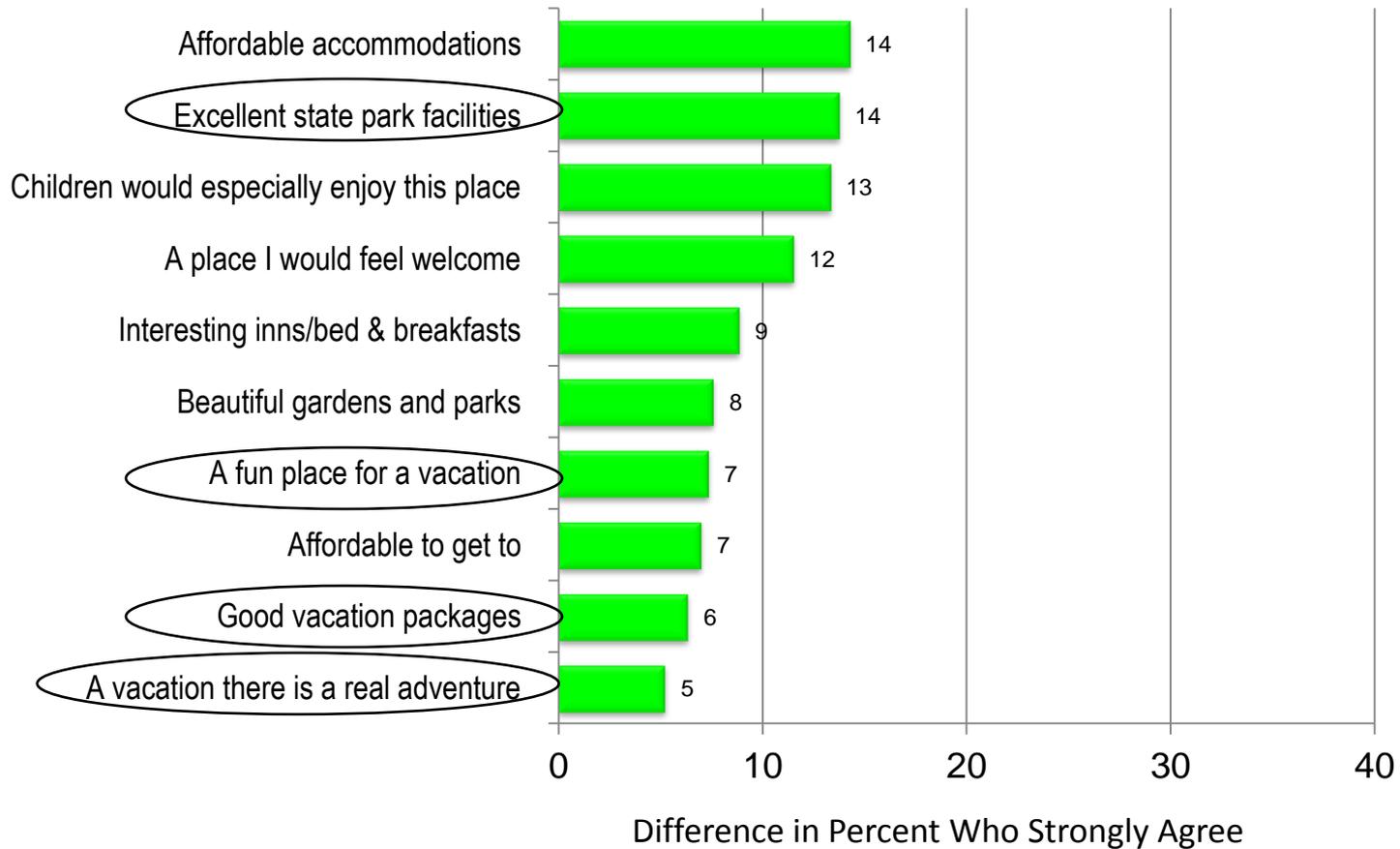


Circled attributes are some of the most important image hot buttons for travelers

Wisconsin's Image Strengths vs. Illinois (Cont'd)



Base: Total Travelers

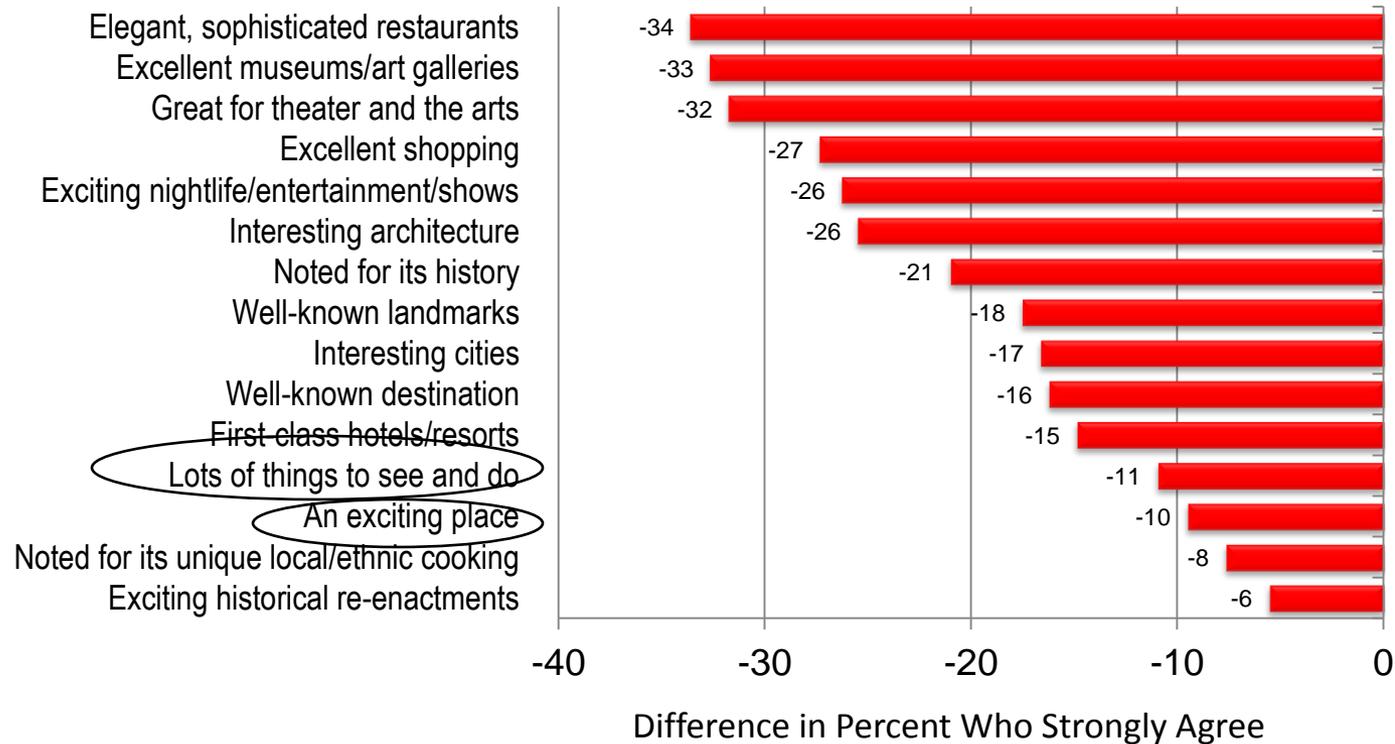


Circled attributes are some of the most important image hot buttons for travelers

Wisconsin's Image Weaknesses vs. Illinois



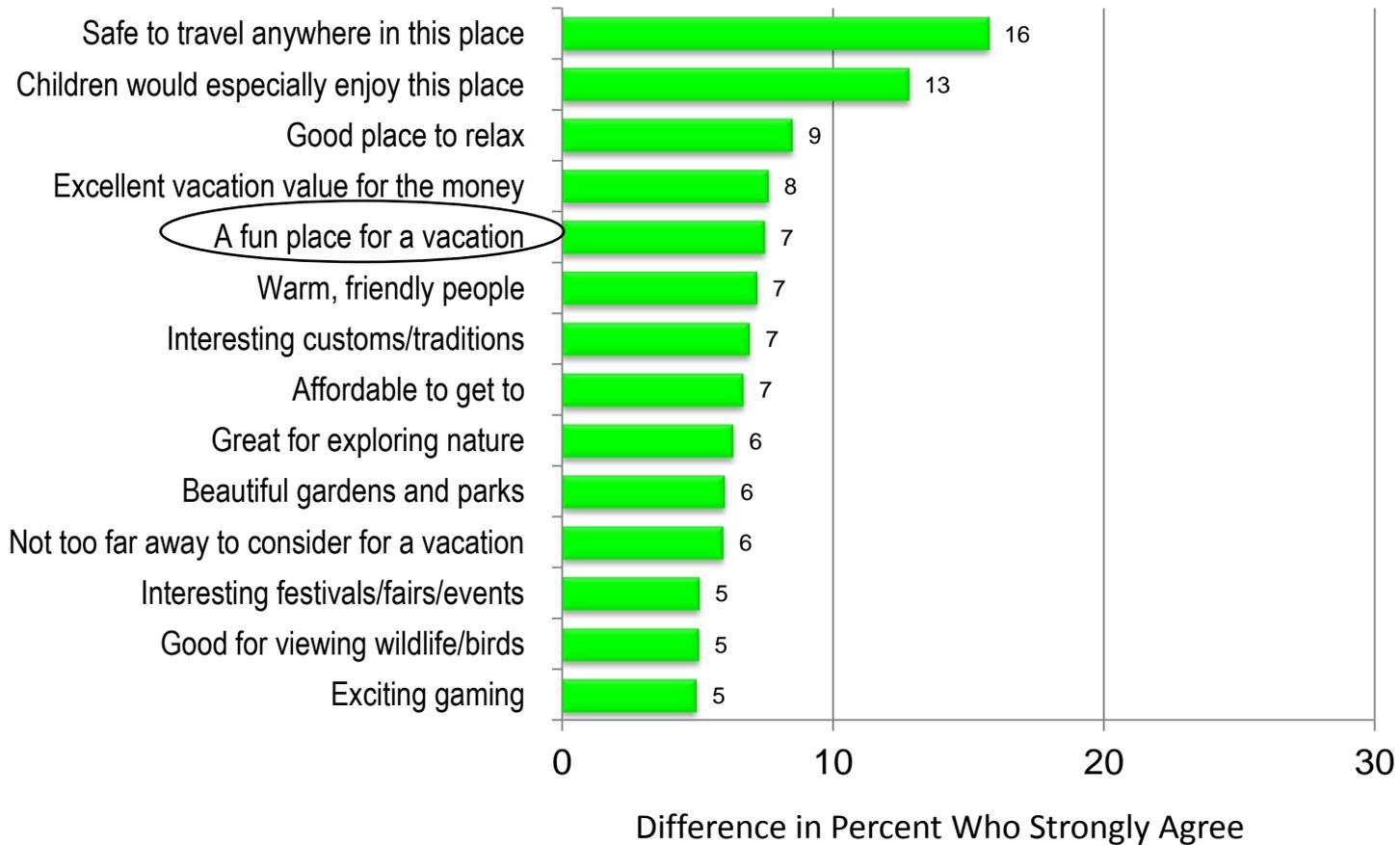
Base: Total Travelers



Wisconsin's Image Strengths vs. Michigan



Base: Total Travelers

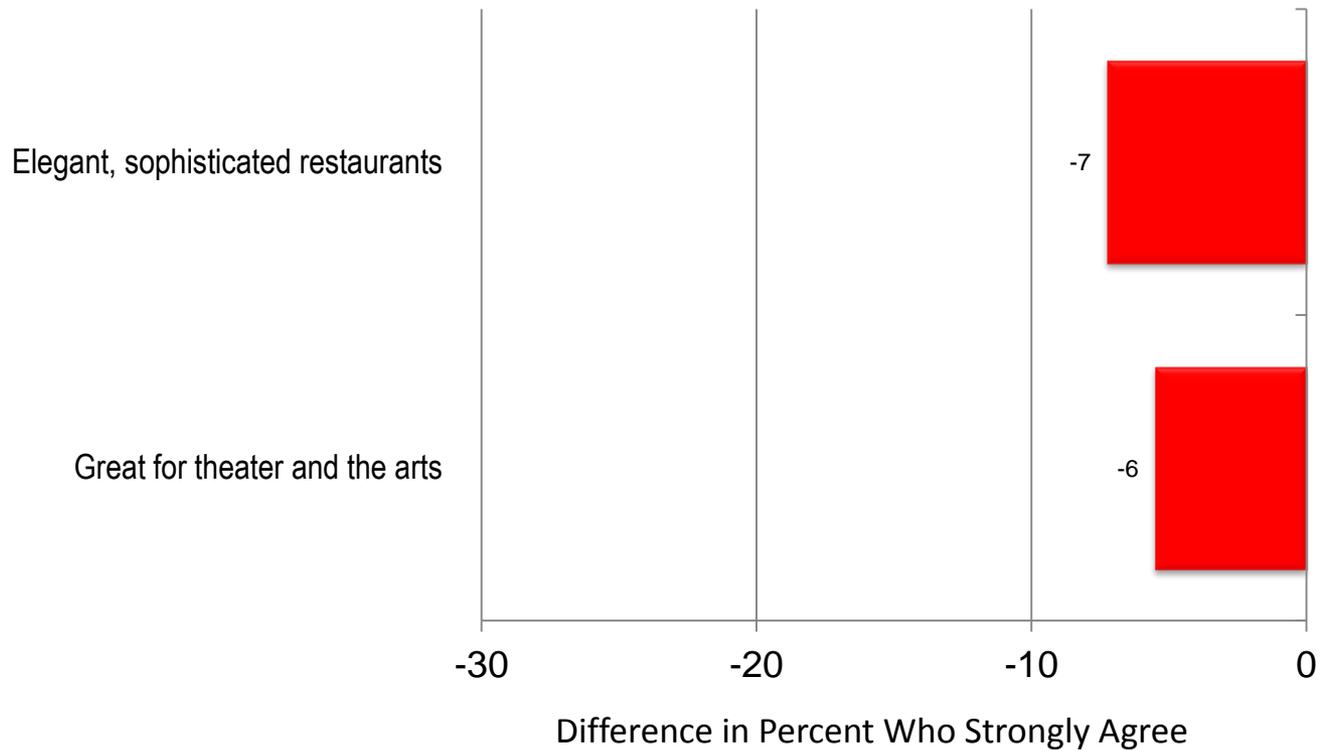


Circled attributes are some of the most important image hot buttons for travelers

Wisconsin's Image Weaknesses vs. Michigan



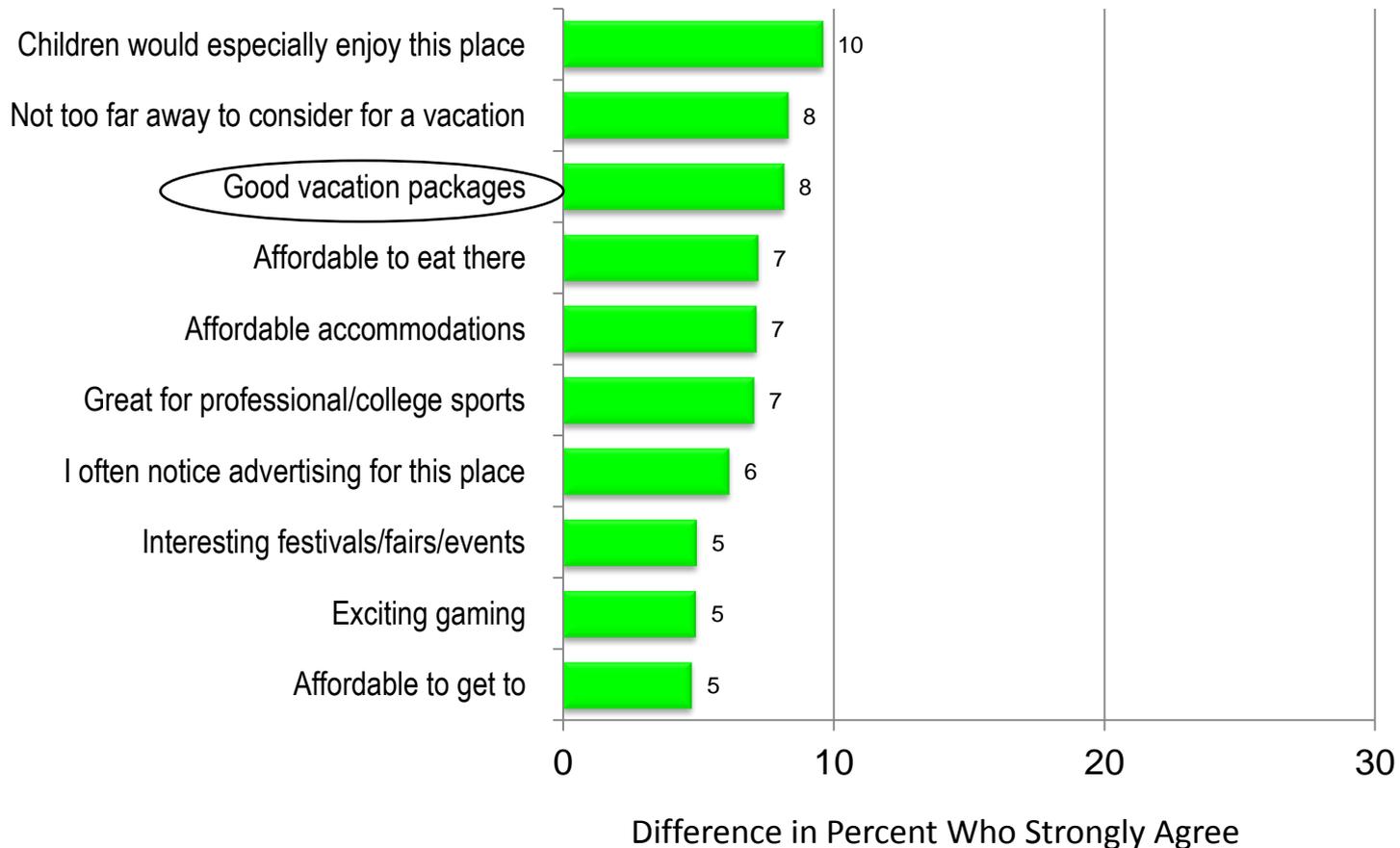
Base: Total Travelers



Wisconsin's Image Strengths vs. Minnesota



Base: Total Travelers

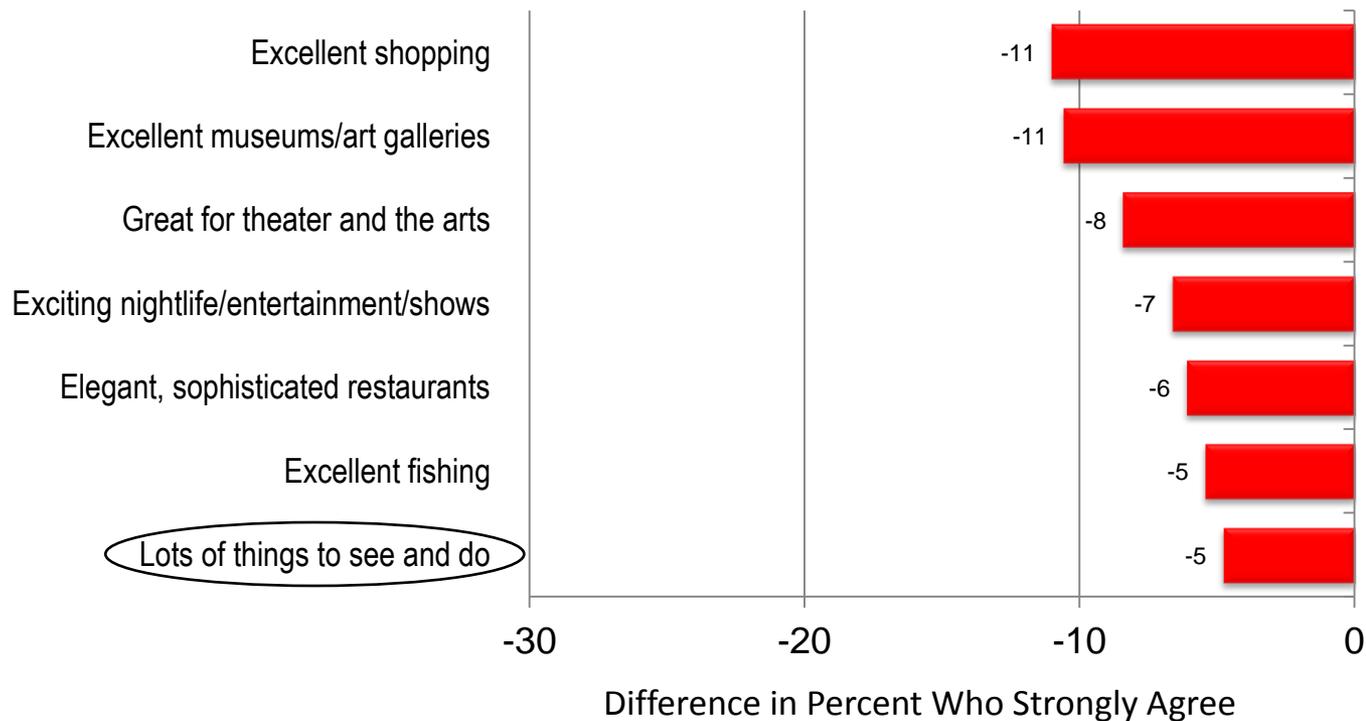


Circled attributes are some of the most important image hot buttons for travelers

Wisconsin's Image Weaknesses vs. Minnesota



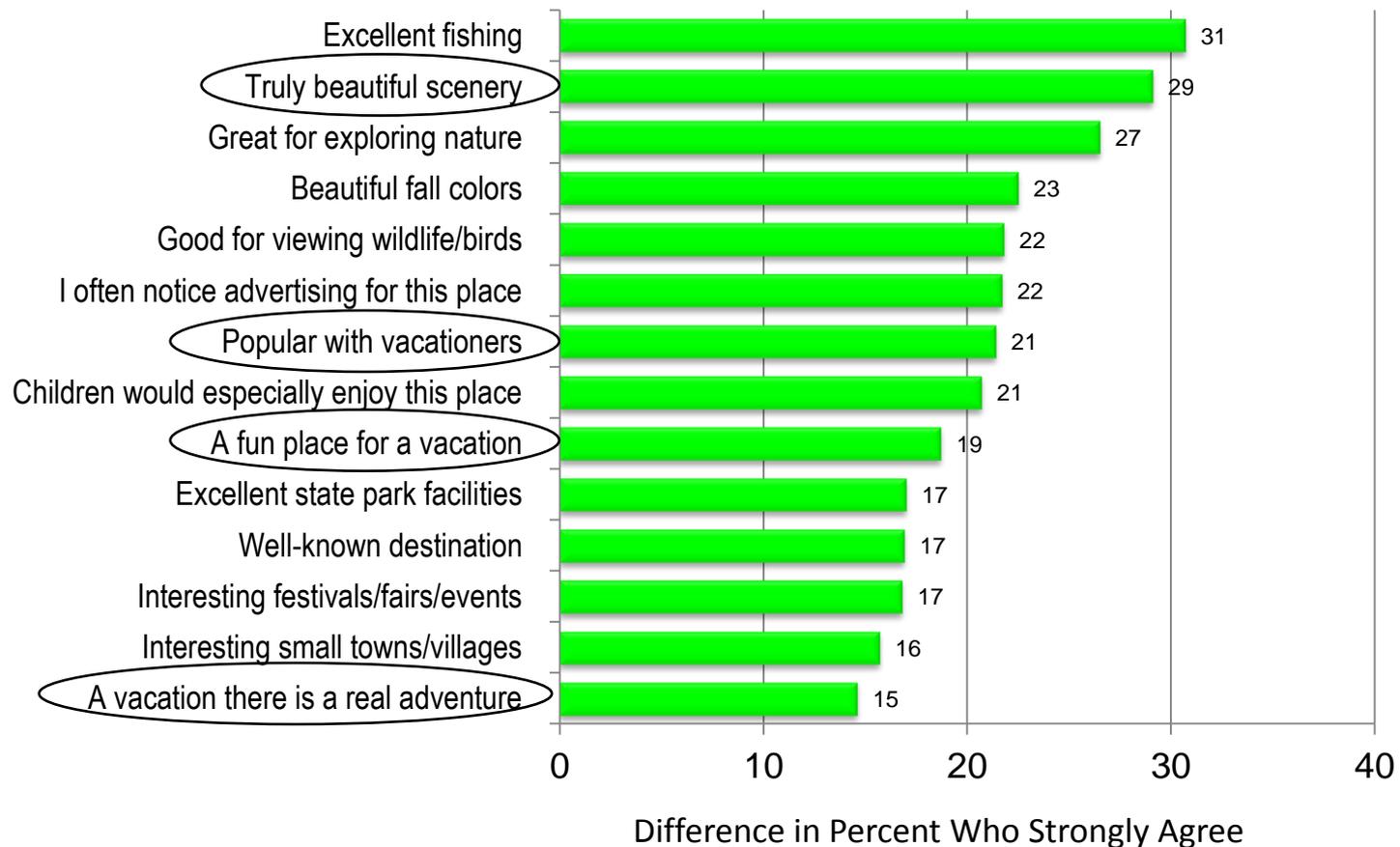
Base: Total Travelers



Wisconsin's Image Strengths vs. Indiana



Base: Total Travelers

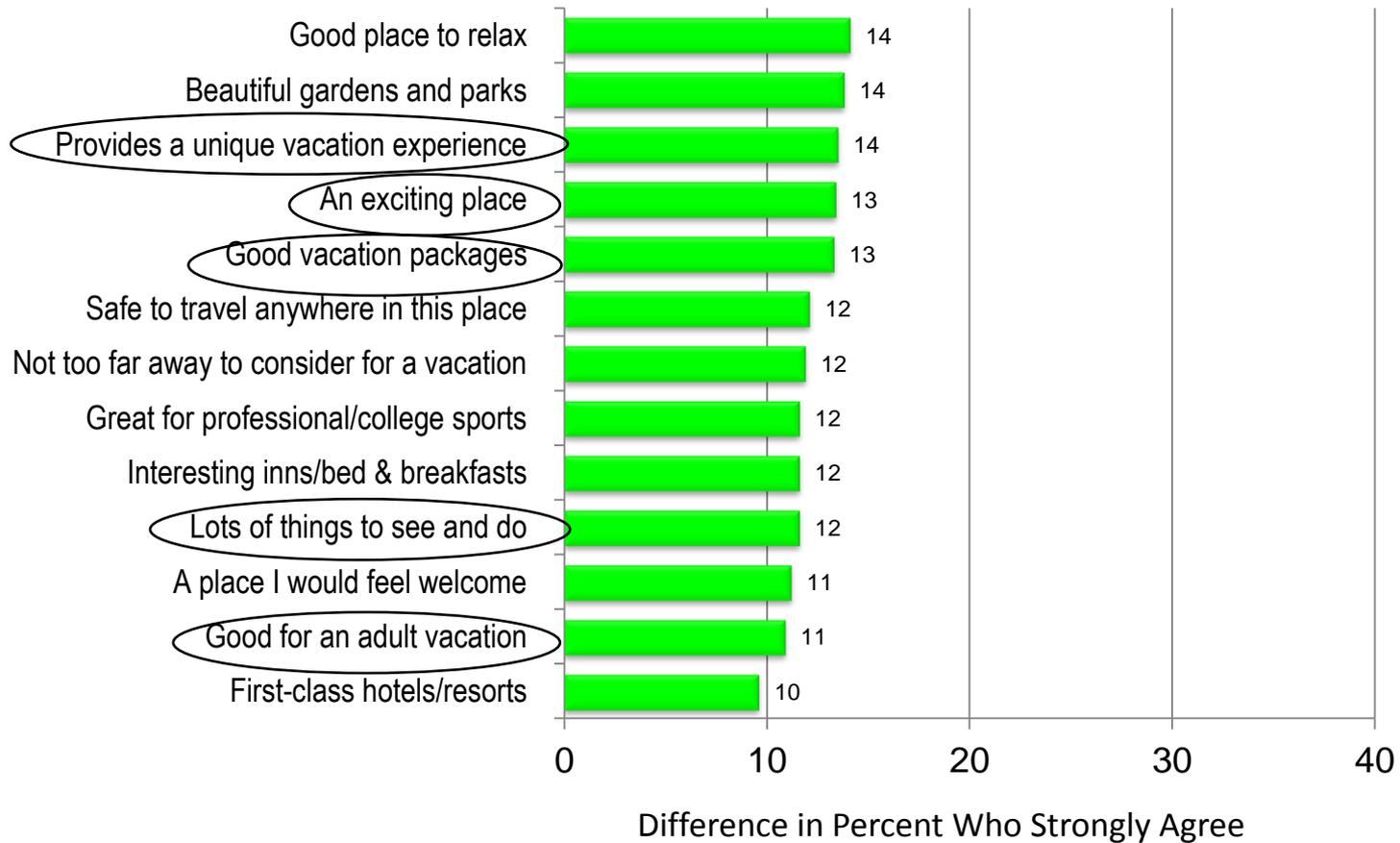


Circled attributes are some of the most important image hot buttons for travelers

Wisconsin's Image Strengths vs. Indiana (Cont'd)



Base: Total Travelers

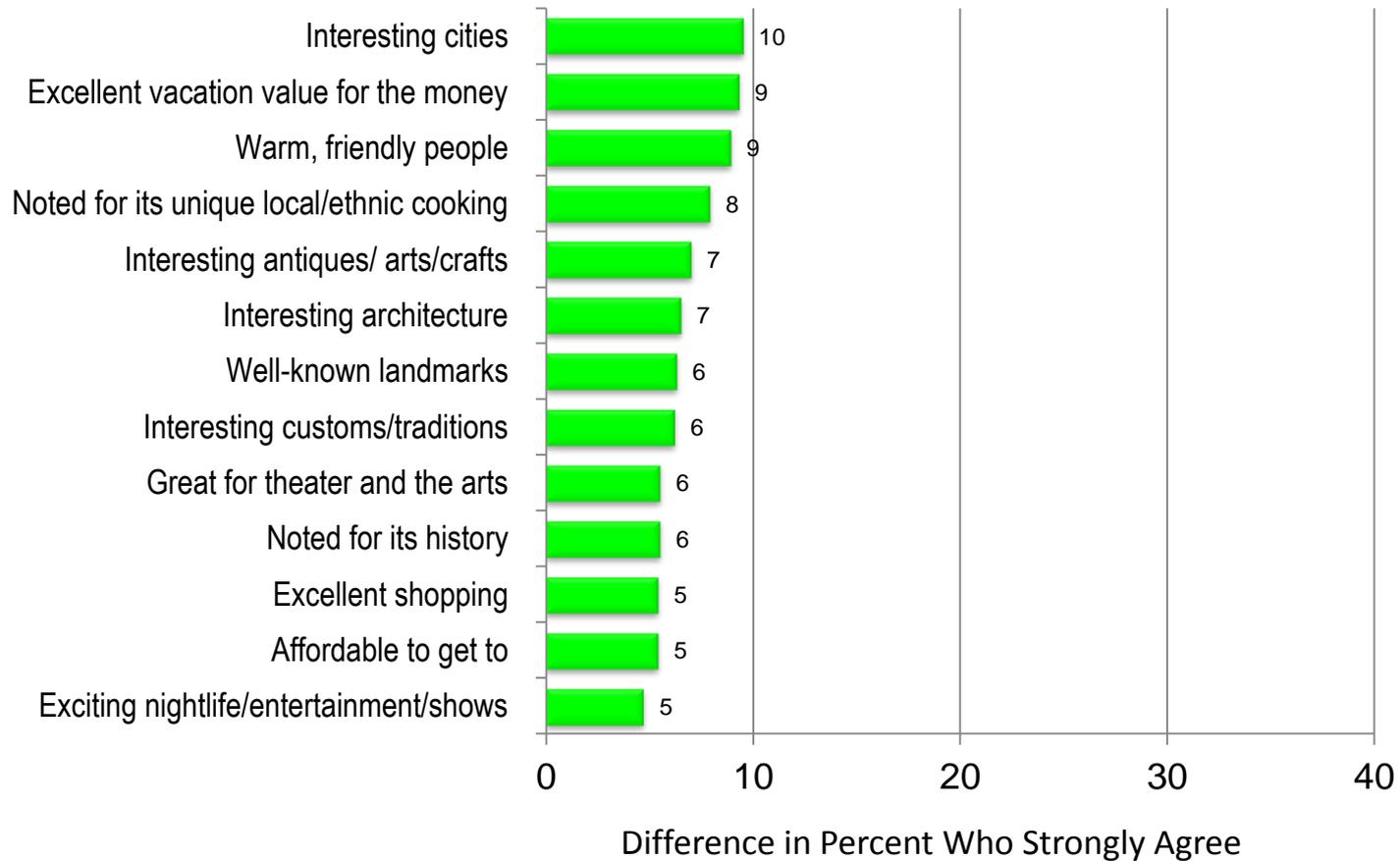


Circled attributes are some of the most important image hot buttons for travelers

Wisconsin's Image Strengths vs. Indiana (Cont'd)



Base: Total Travelers



Circled attributes are some of the most important image hot buttons for travelers

Wisconsin's Image Weaknesses vs. Indiana

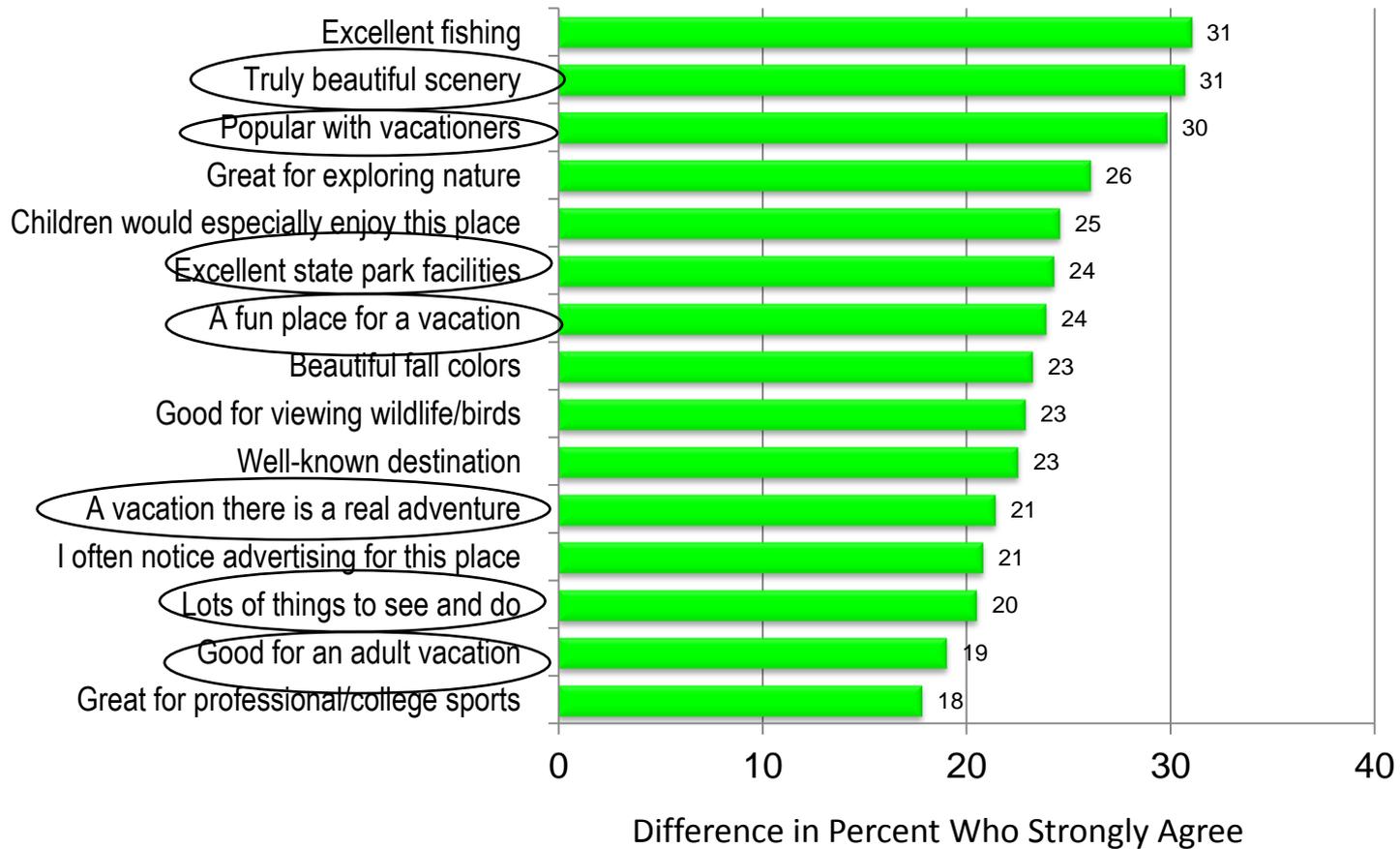


**No Image Weaknesses
vs. Indiana**

Wisconsin's Image Strengths vs. Iowa



Base: Total Travelers

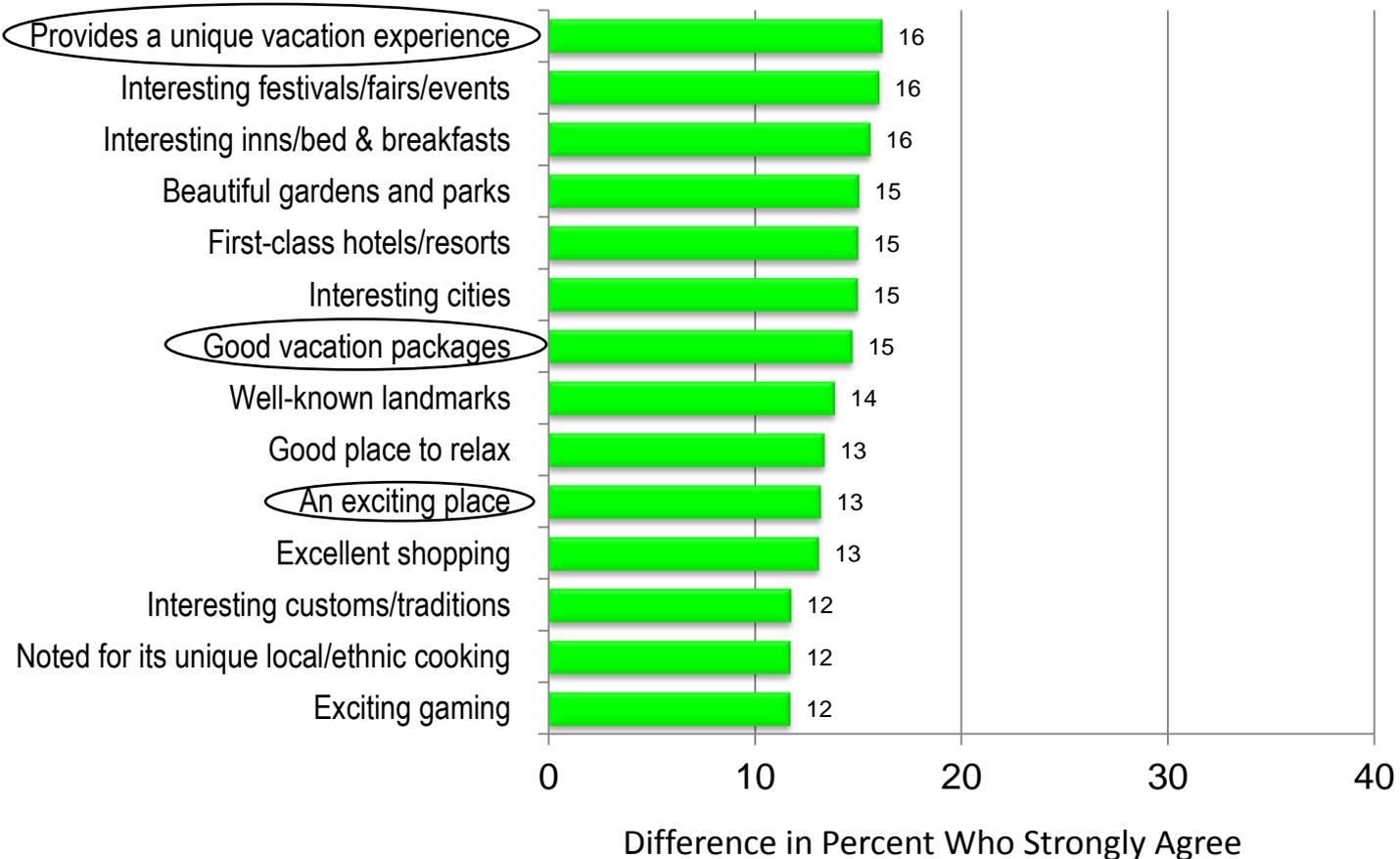


Circled attributes are some of the most important image hot buttons for travelers

Wisconsin's Image Strengths vs. Iowa (Cont'd)



Base: Total Travelers

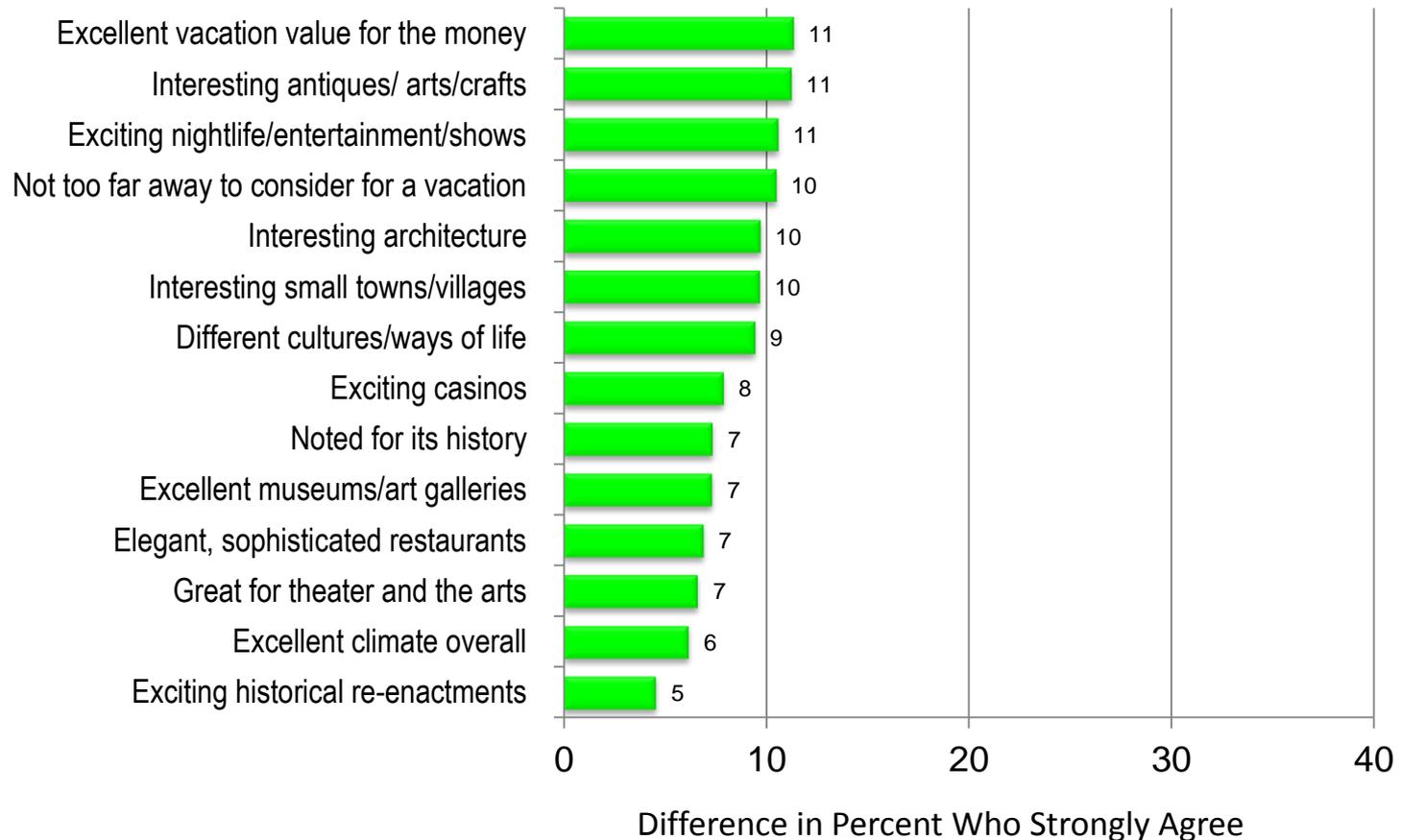


Circled attributes are some of the most important image hot buttons for travelers

Wisconsin's Image Strengths vs. Iowa (Cont'd)



Base: Total Travelers

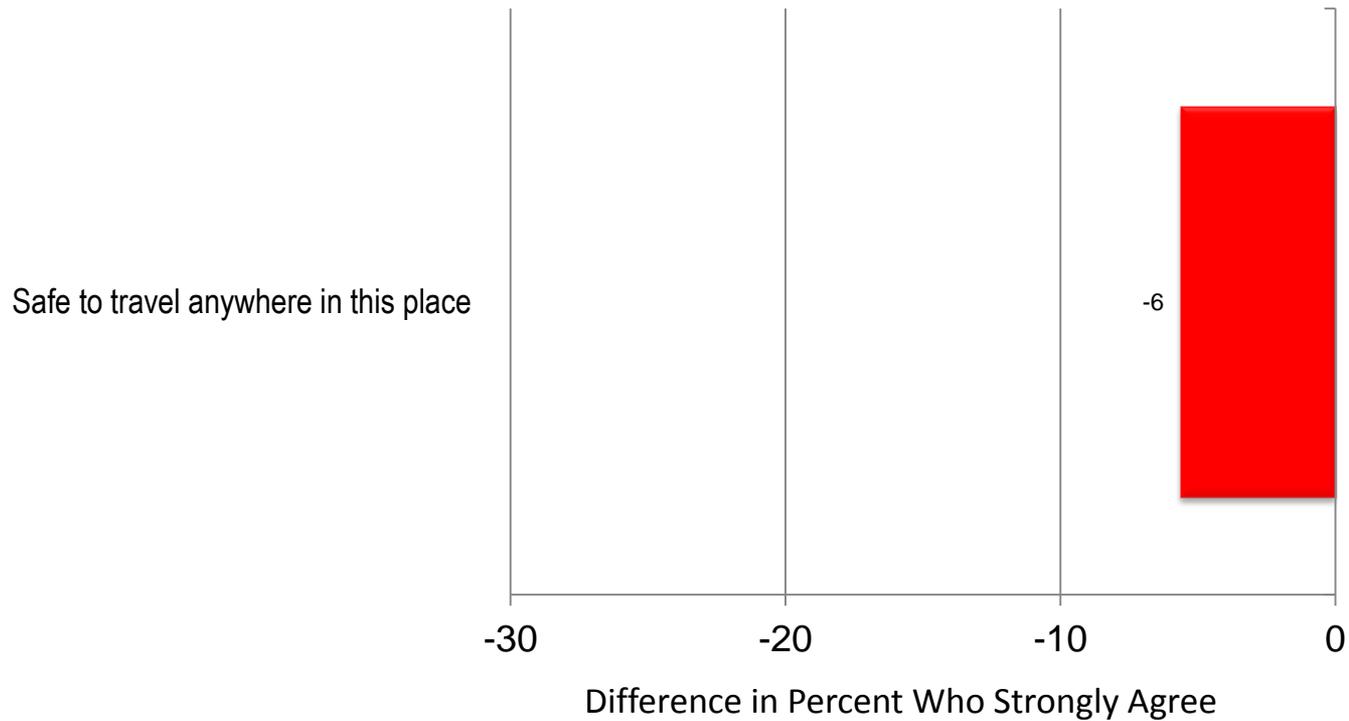


Circled attributes are some of the most important image hot buttons for travelers

Wisconsin's Image Weaknesses vs. Iowa



Base: Total Travelers



Wisconsin's Tourism Product

Wisconsin's Tourism Product



- ⦿ A comparison of the ratings between recent visitors to Wisconsin vs. recent visitors to the competitive destinations provides a comparative look at Wisconsin's tourism product.
- ⦿ Wisconsin's tourism product ratings are superior to those of the competition, especially leading the competitors for offering great sports and recreation facilities, providing a worry free experience, for being an affordable destination and for having a good family atmosphere.
- ⦿ Product weaknesses compared to competitors are primarily in luxury offerings, such as first class hotels/resorts and elegant restaurants, and entertainment, such as nightlife and the arts.

Wisconsin's Tourism Product (Continued)

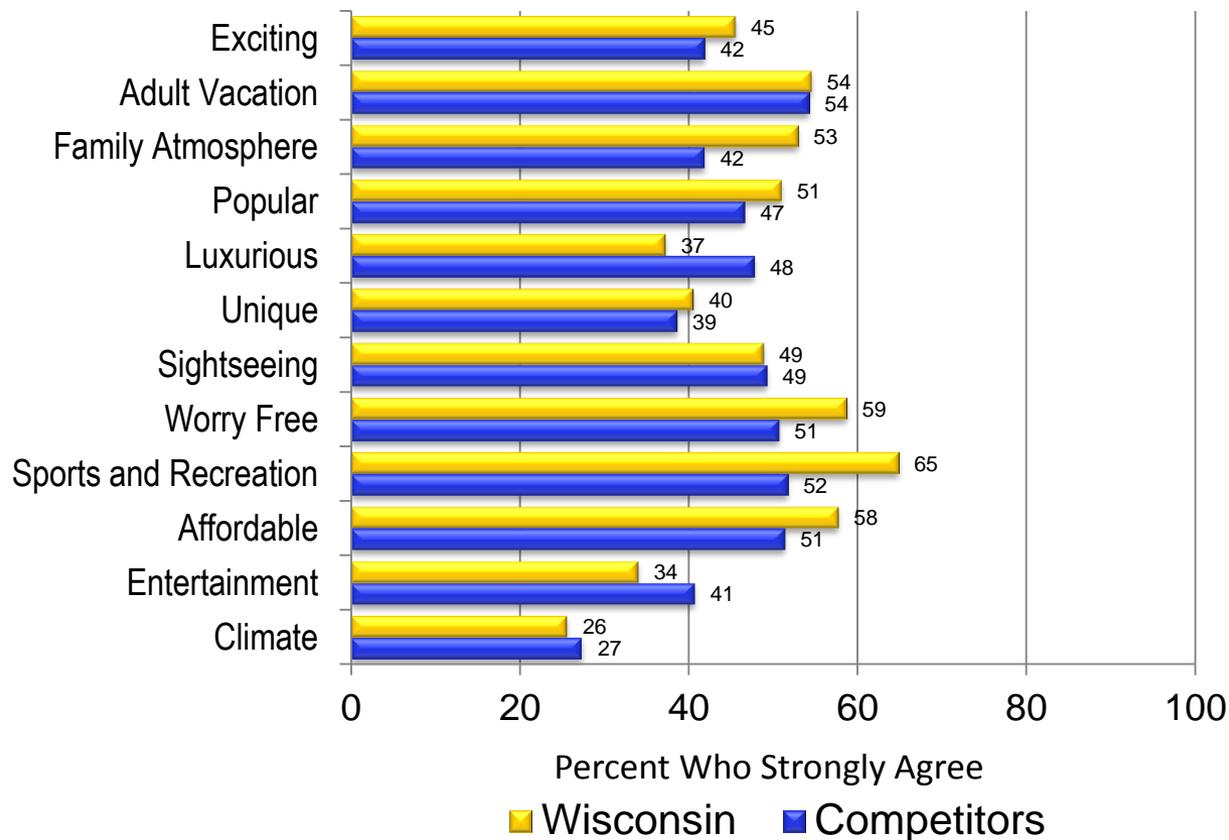


- ⦿ Looking at Wisconsin's product performance vs. competitors from the perspective of the individual attributes, Wisconsin's greatest strengths vs. the competition are:
 - ⦿ *outdoor product and nature – fishing, beautiful fall colors and scenery, the opportunity to explore nature and view wildlife and birds*
 - ⦿ *a place children would especially enjoy*
 - ⦿ *a safe, friendly and relaxing environment*
 - ⦿ *a fun, popular destination that offers good vacation value*
 - ⦿ *interesting small towns and villages*
- ⦿ Product weaknesses vs. competitors relate to luxurious amenities as well as:
 - ⦿ *excellent shopping*
 - ⦿ *theater and the arts*
 - ⦿ *interesting architecture*
 - ⦿ *nightlife and entertainment*

Wisconsin's Tourism Product vs. Competitors by Travel Motivating Factors



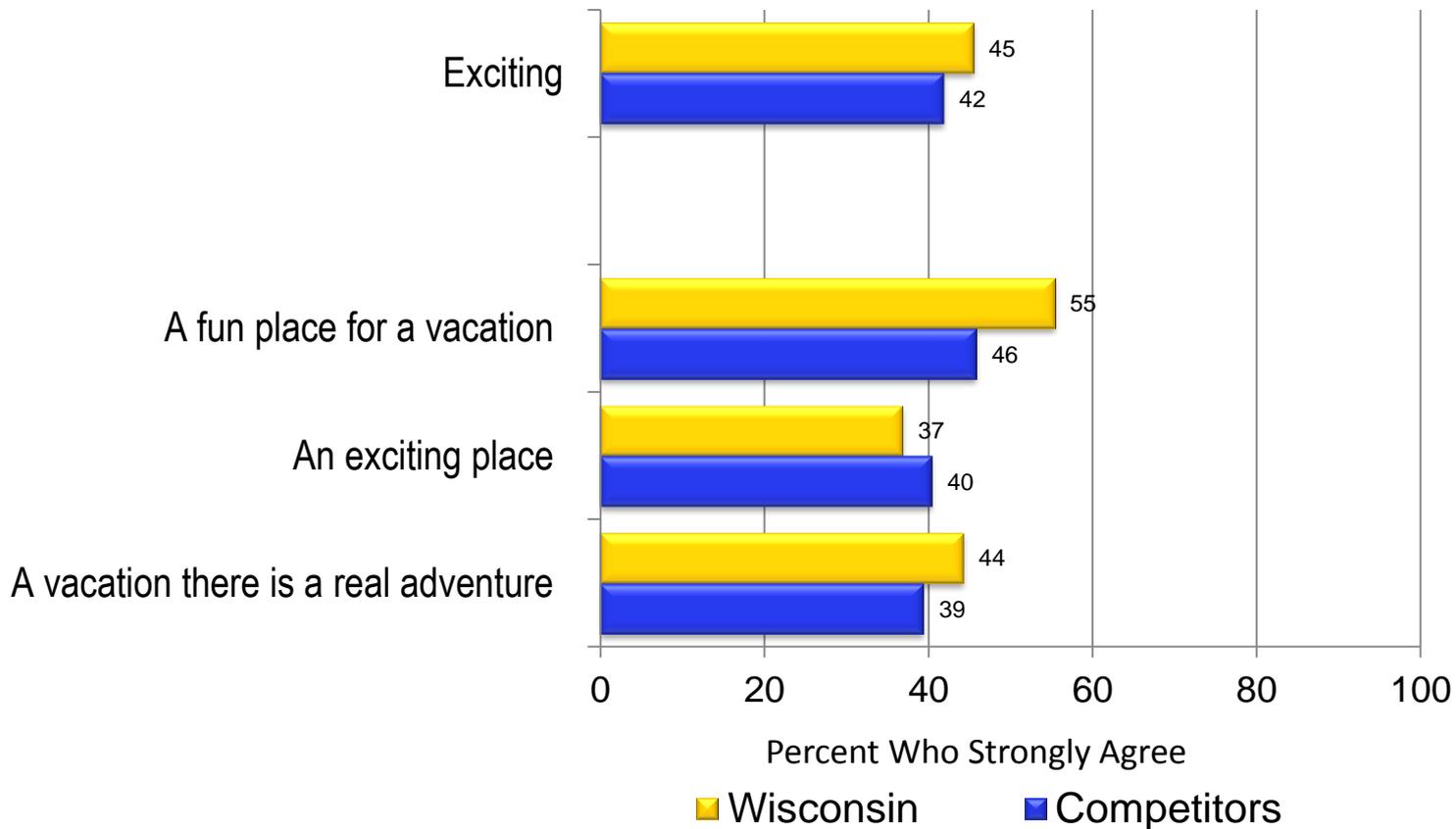
Base: Travelers who visited destination in past two years



Wisconsin's Tourism Product — Exciting



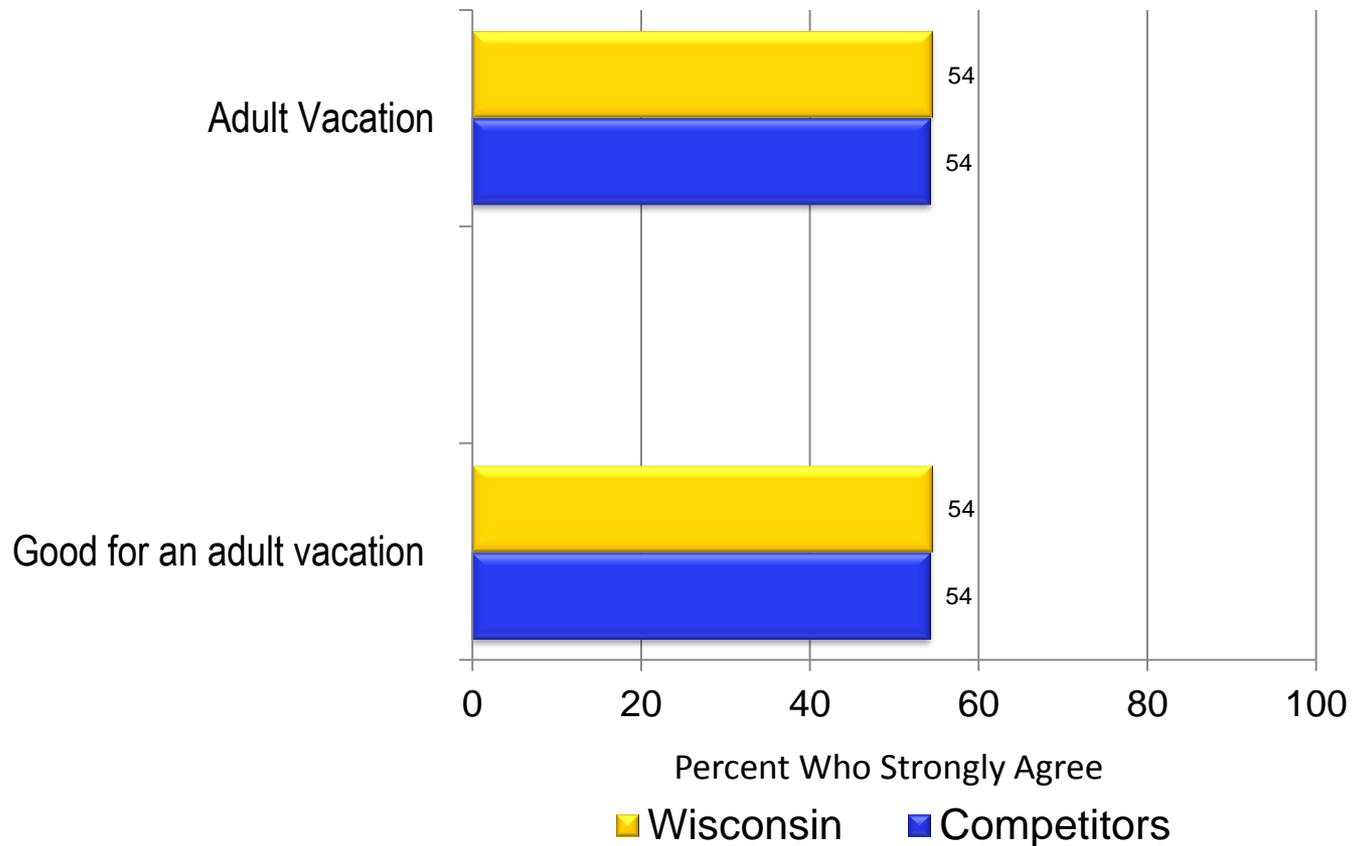
Base: Travelers who visited destination in past two years



Wisconsin's Tourism Product – Adult Vacation



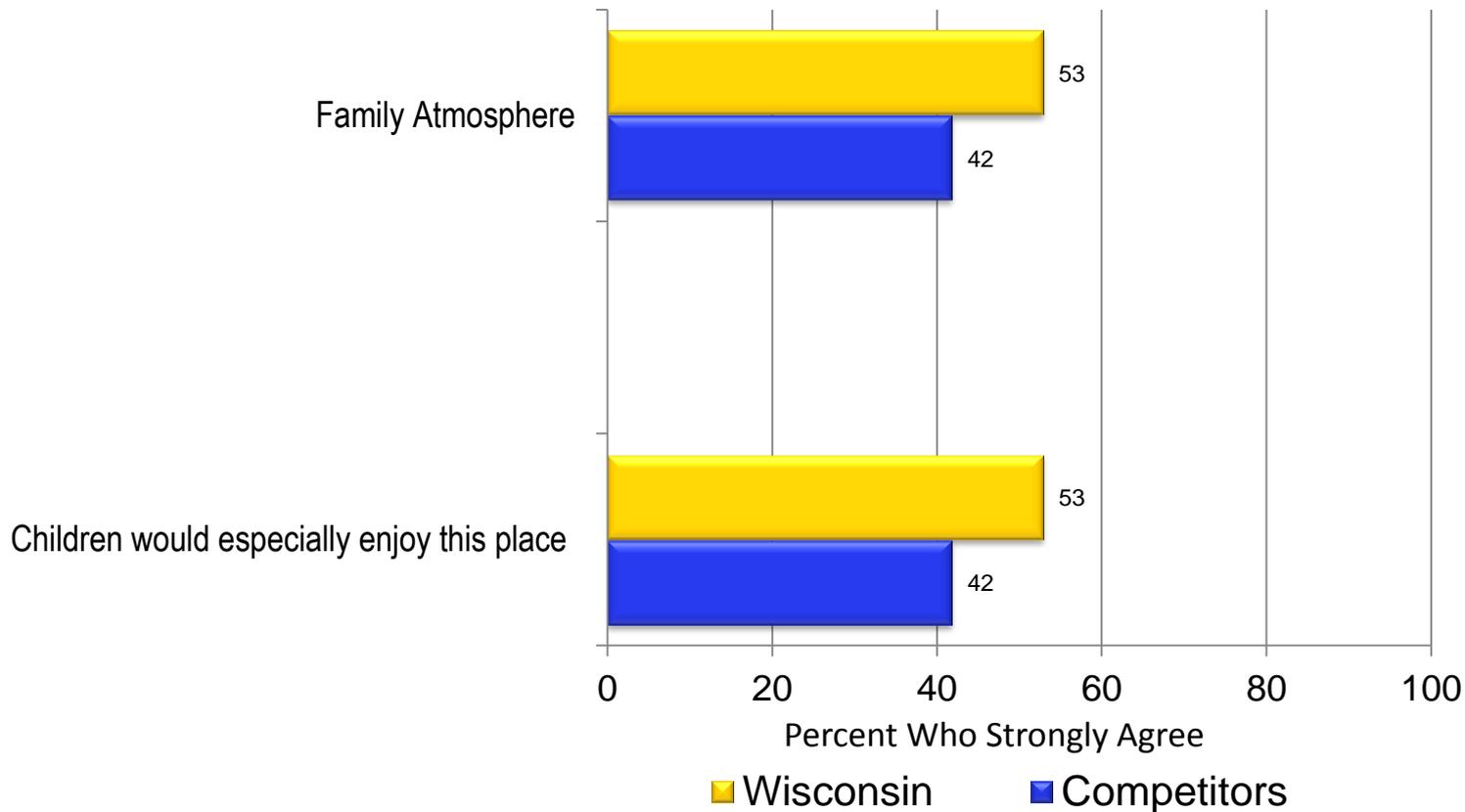
Base: Travelers who visited destination in past two years



Wisconsin's Tourism Product — Family Atmosphere



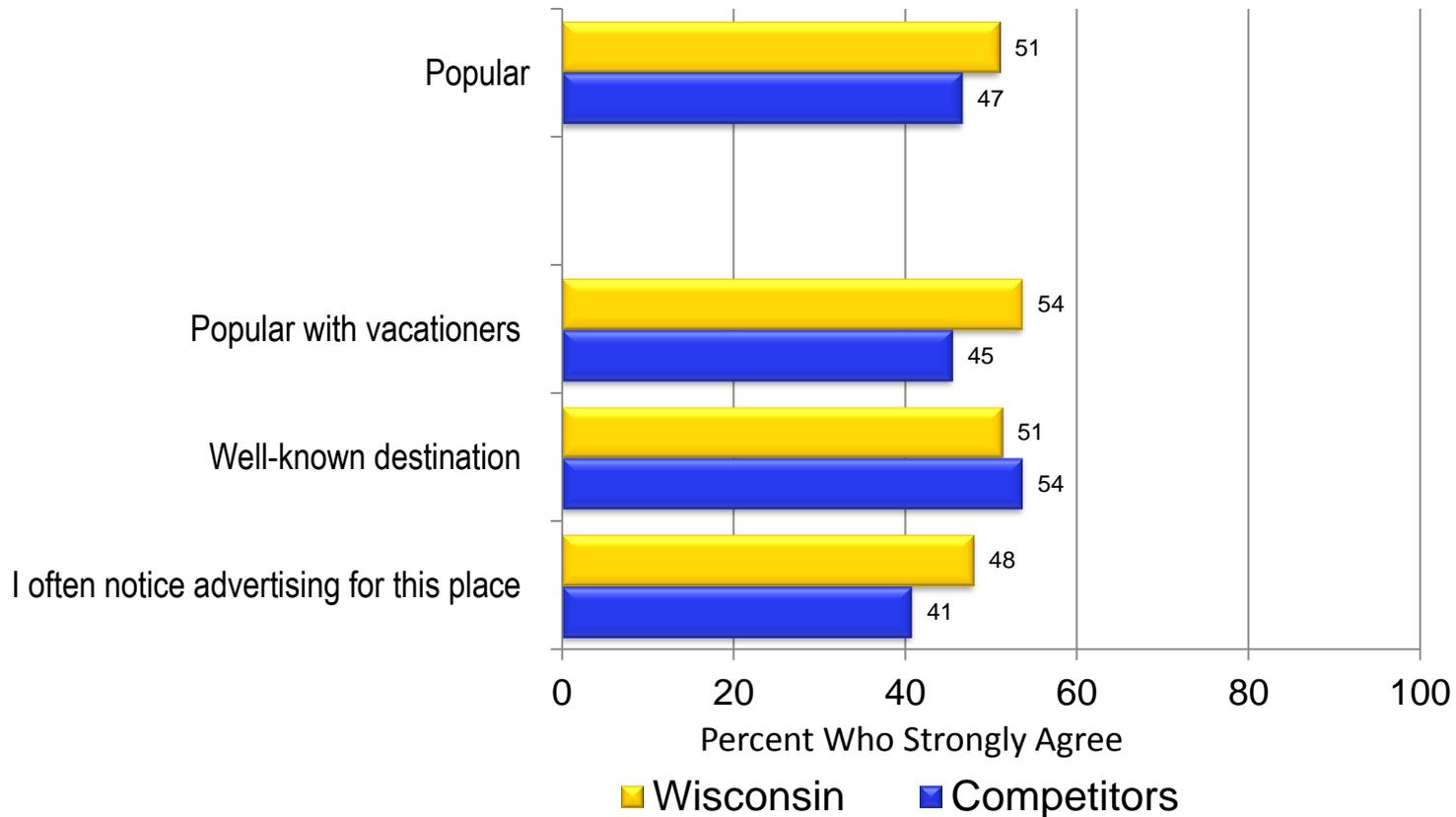
Base: Travelers who visited destination in past two years



Wisconsin's Tourism Product — Popular



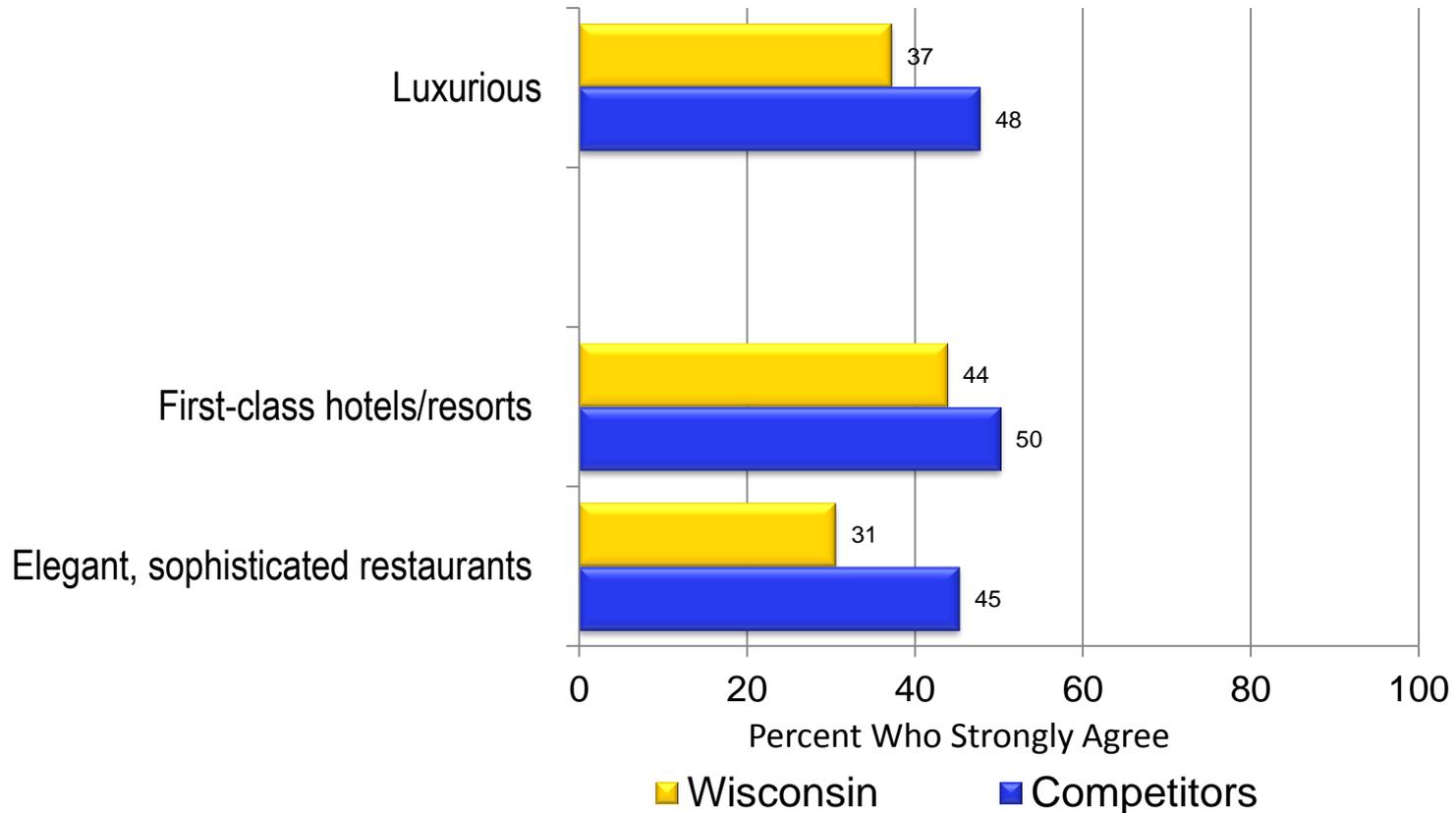
Base: Travelers who visited destination in past two years



Wisconsin's Tourism Product — Luxurious



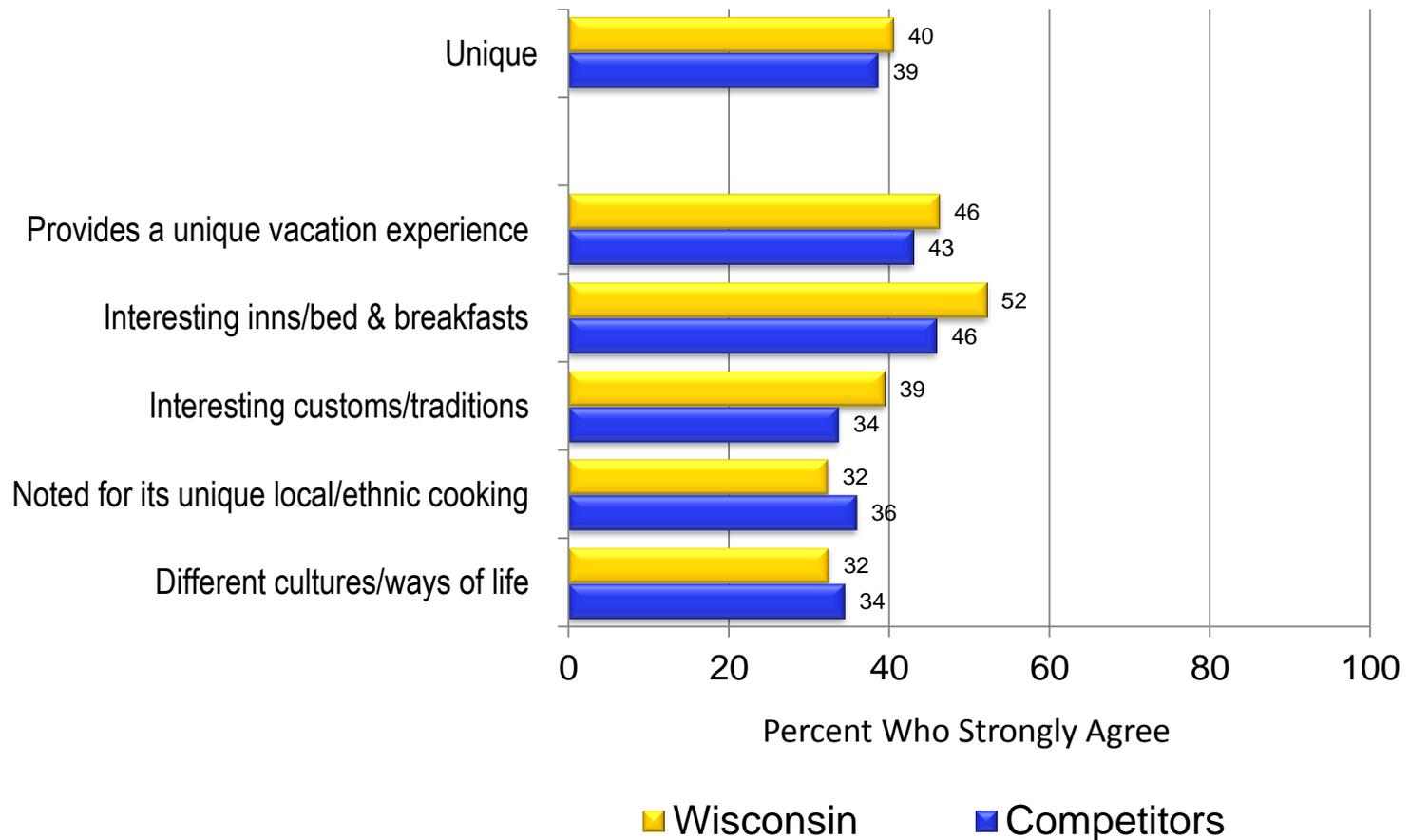
Base: Travelers who visited destination in past two years



Wisconsin's Tourism Product — Unique



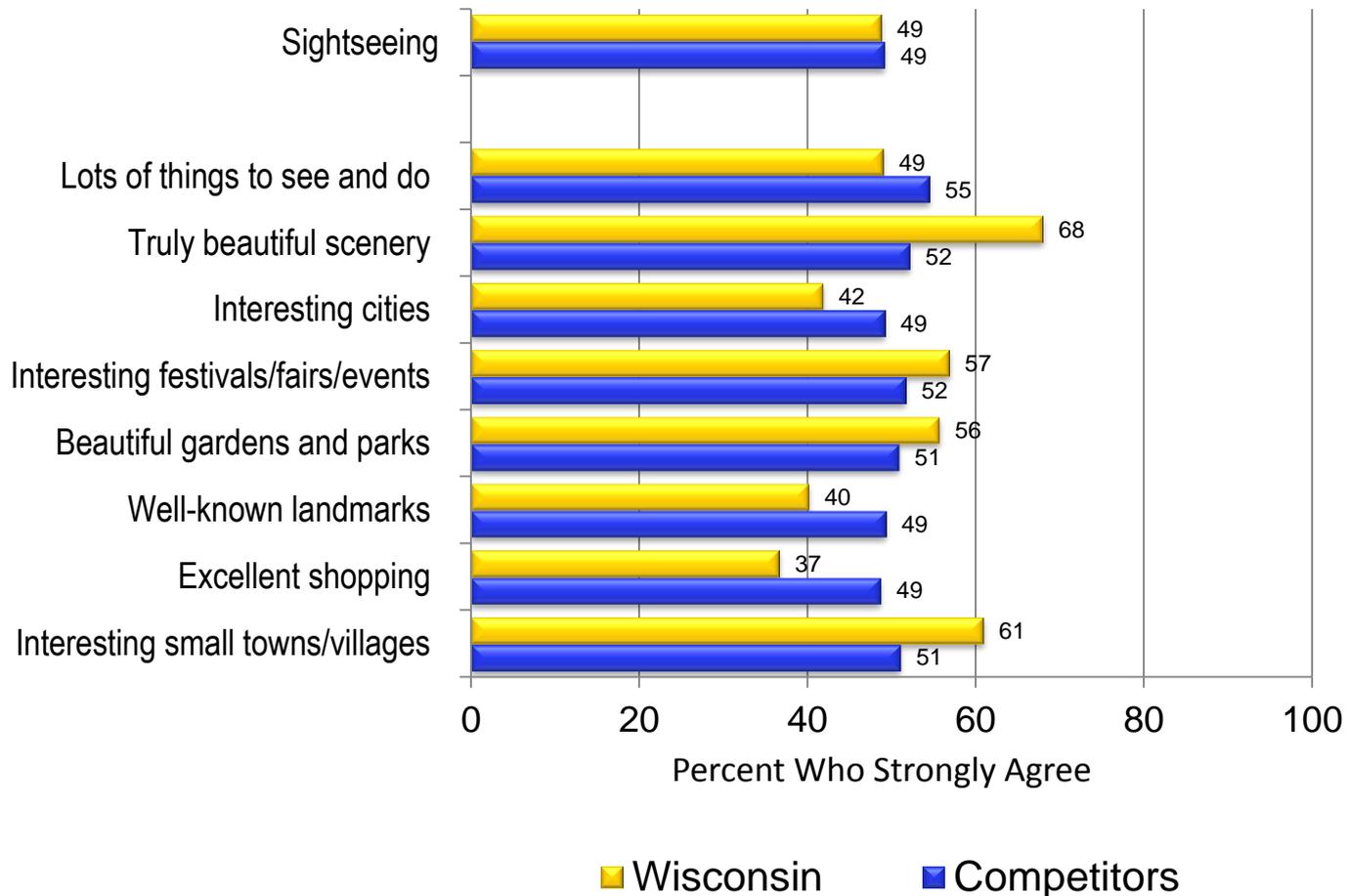
Base: Travelers who visited destination in past two years



Wisconsin's Tourism Product — Sightseeing



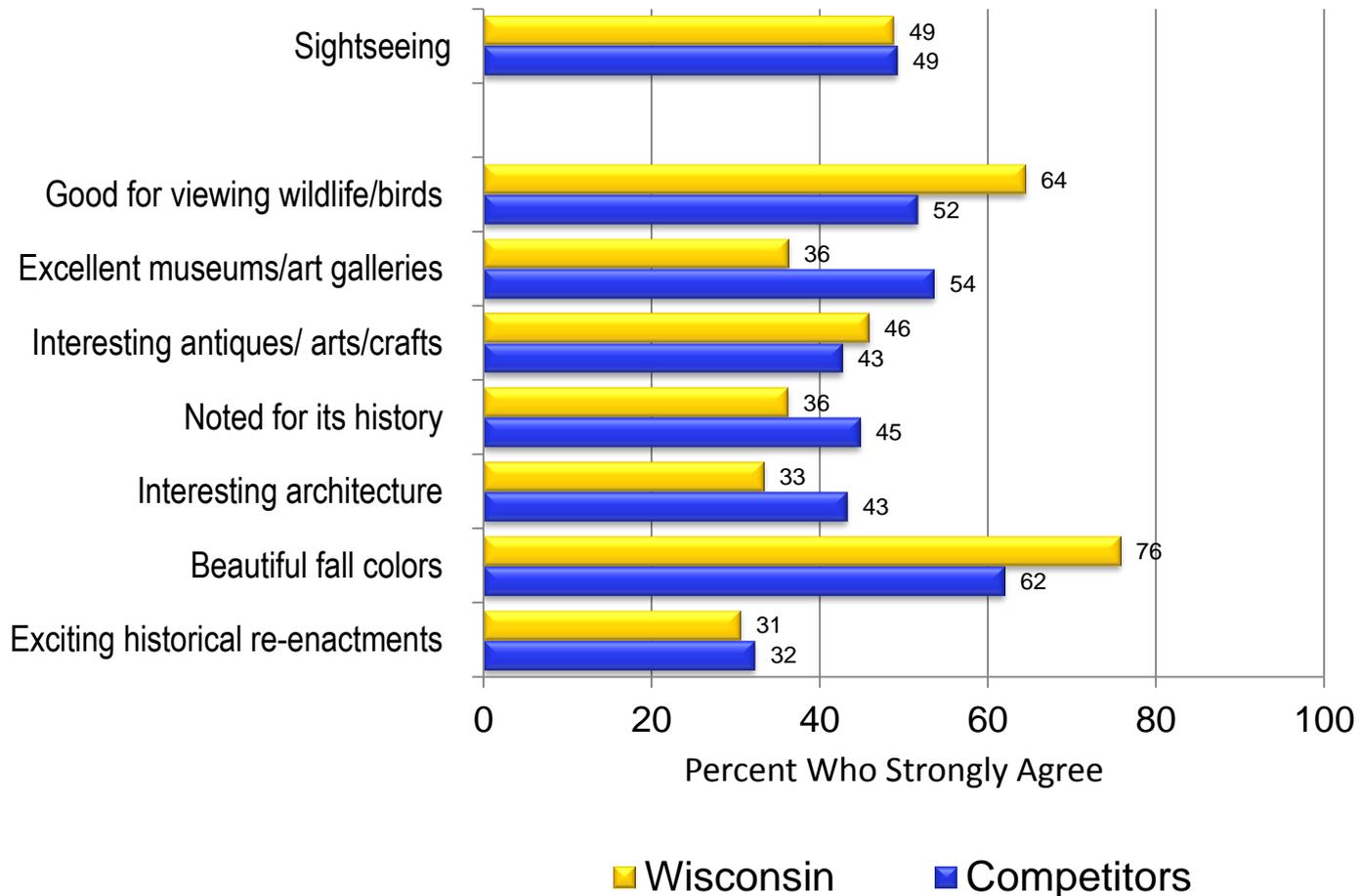
Base: Travelers who visited destination in past two years



Wisconsin's Tourism Product — Sightseeing (Cont'd)



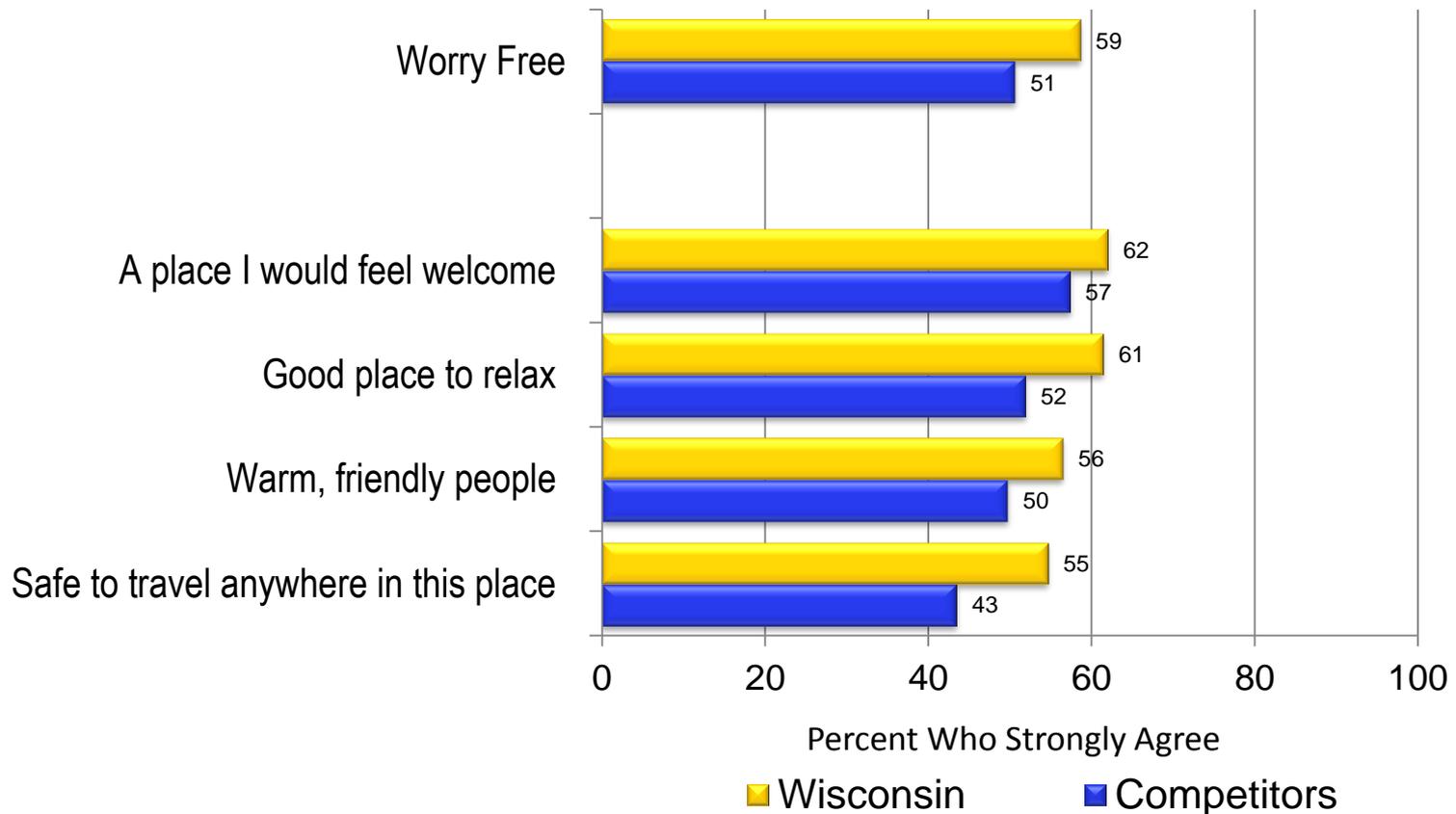
Base: Travelers who visited destination in past two years



Wisconsin's Tourism Product — Worry Free



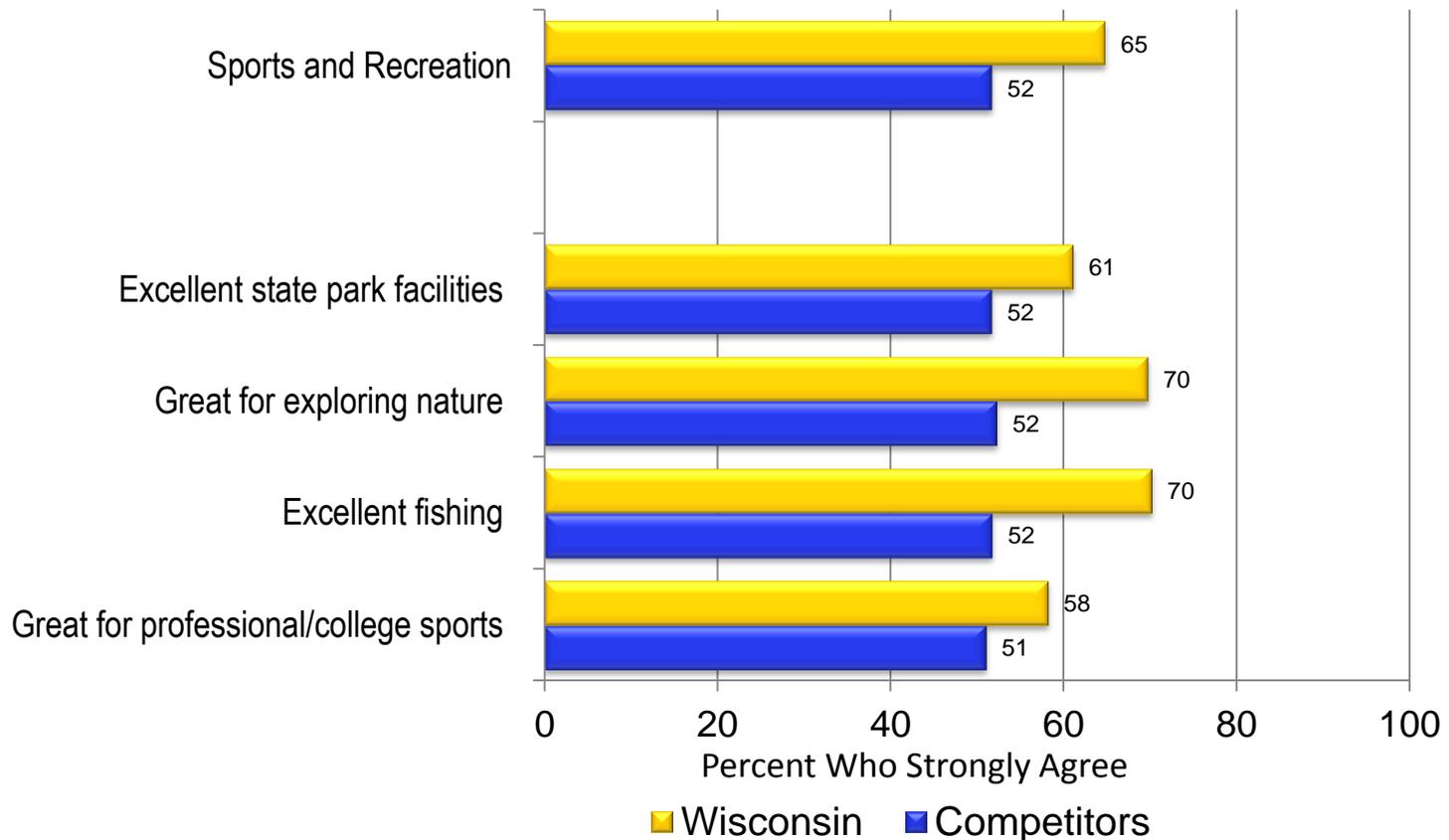
Base: Travelers who visited destination in past two years



Wisconsin's Tourism Product — Sports and Recreation



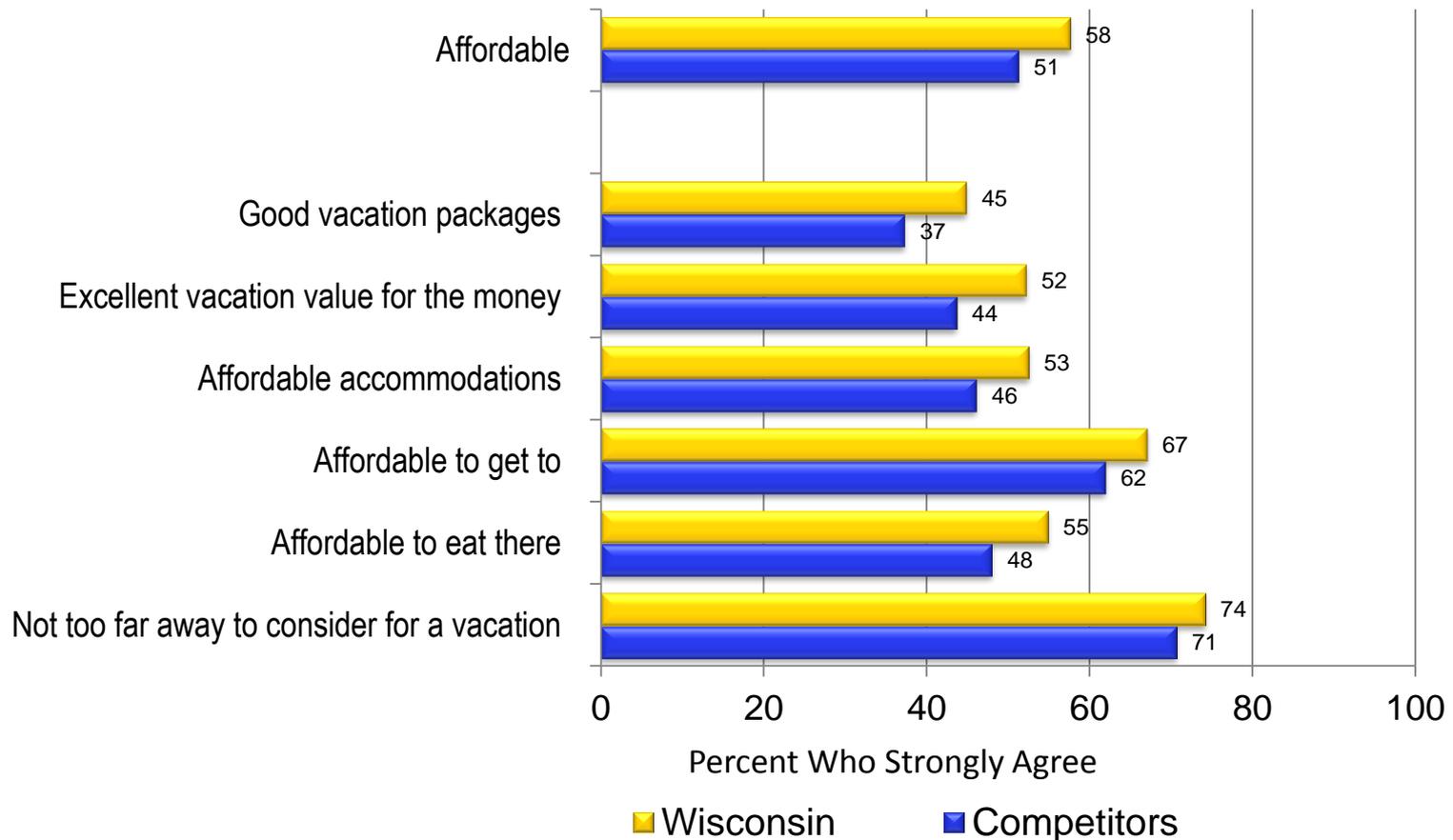
Base: Travelers who visited destination in past two years



Wisconsin's Tourism Product — Affordable



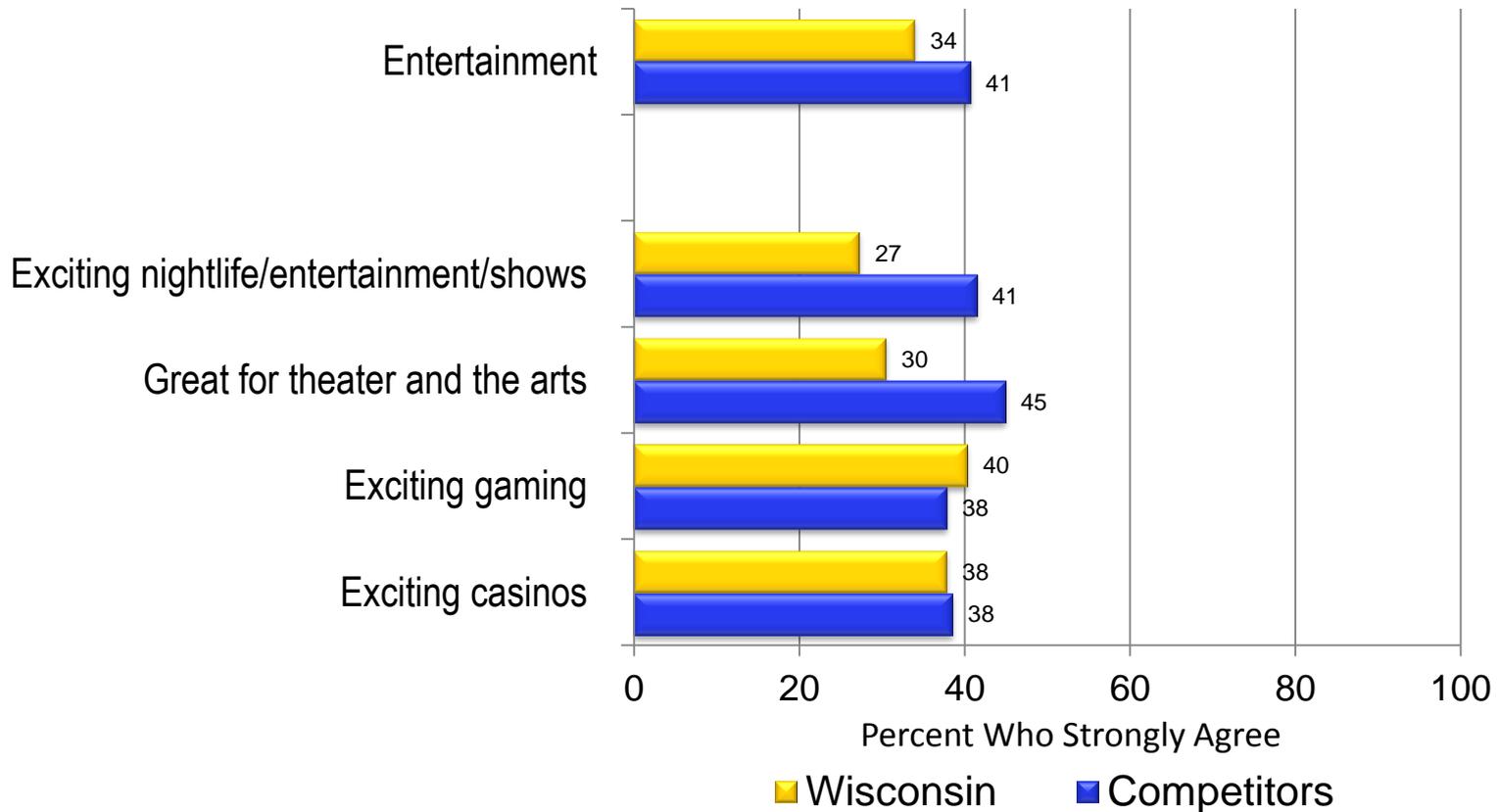
Base: Travelers who visited destination in past two years



Wisconsin's Tourism Product — Entertainment



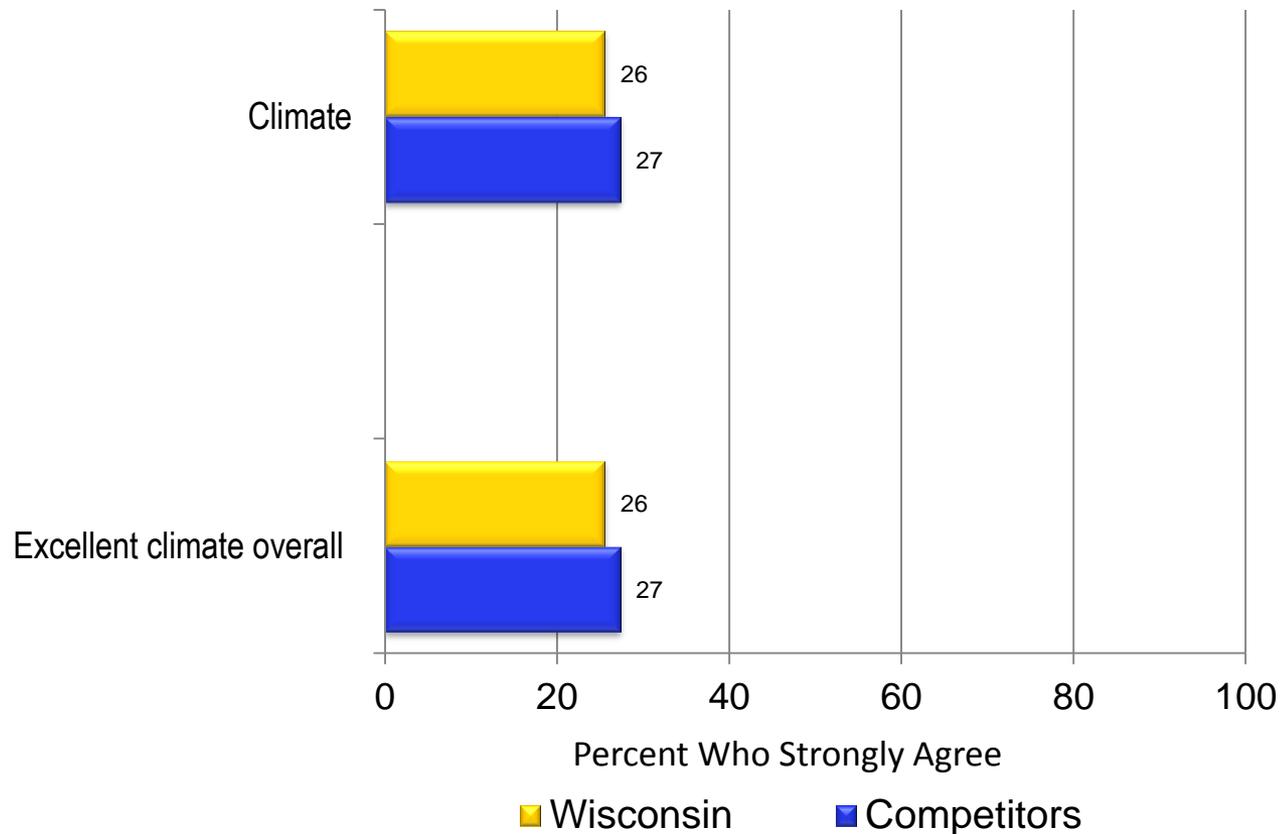
Base: Travelers who visited destination in past two years



Wisconsin's Tourism Product — Climate



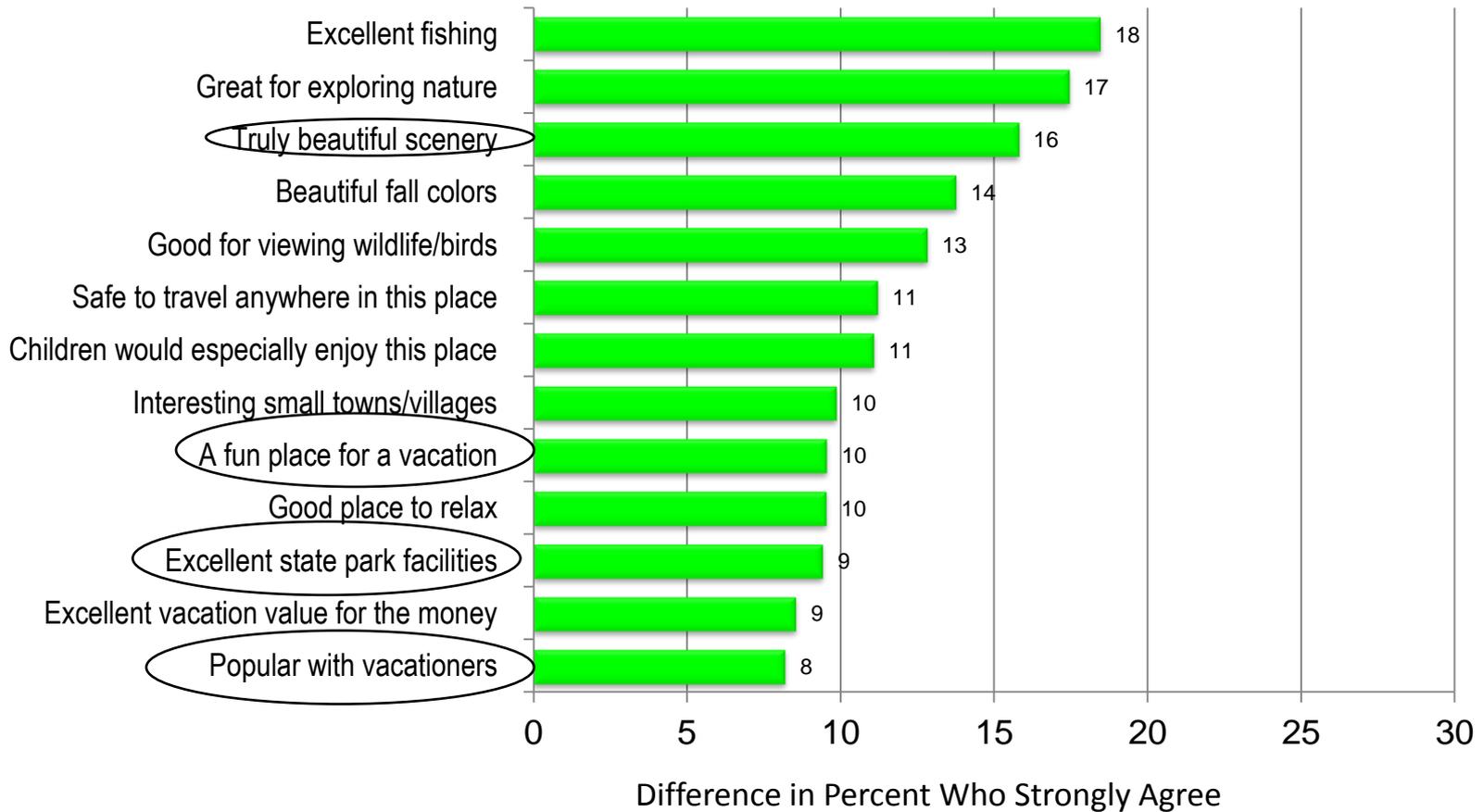
Base: Travelers who visited destination in past two years



Wisconsin's Product Strengths



Base: Travelers who visited destination in past two years

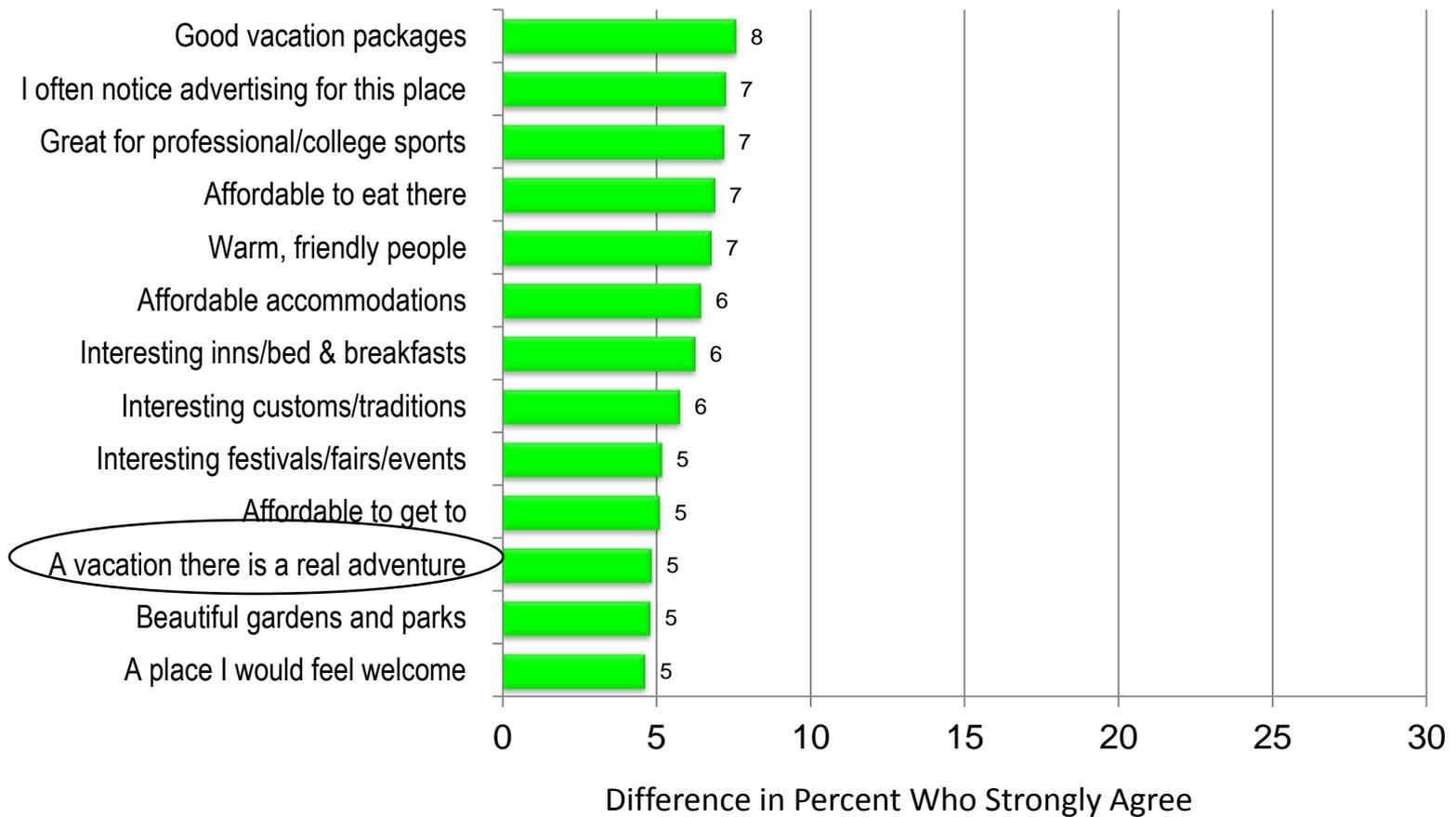


Circled attributes are some of the most important image hot buttons for travelers

Wisconsin's Product Strengths (Cont'd)



Base: Travelers who visited destination in past two years

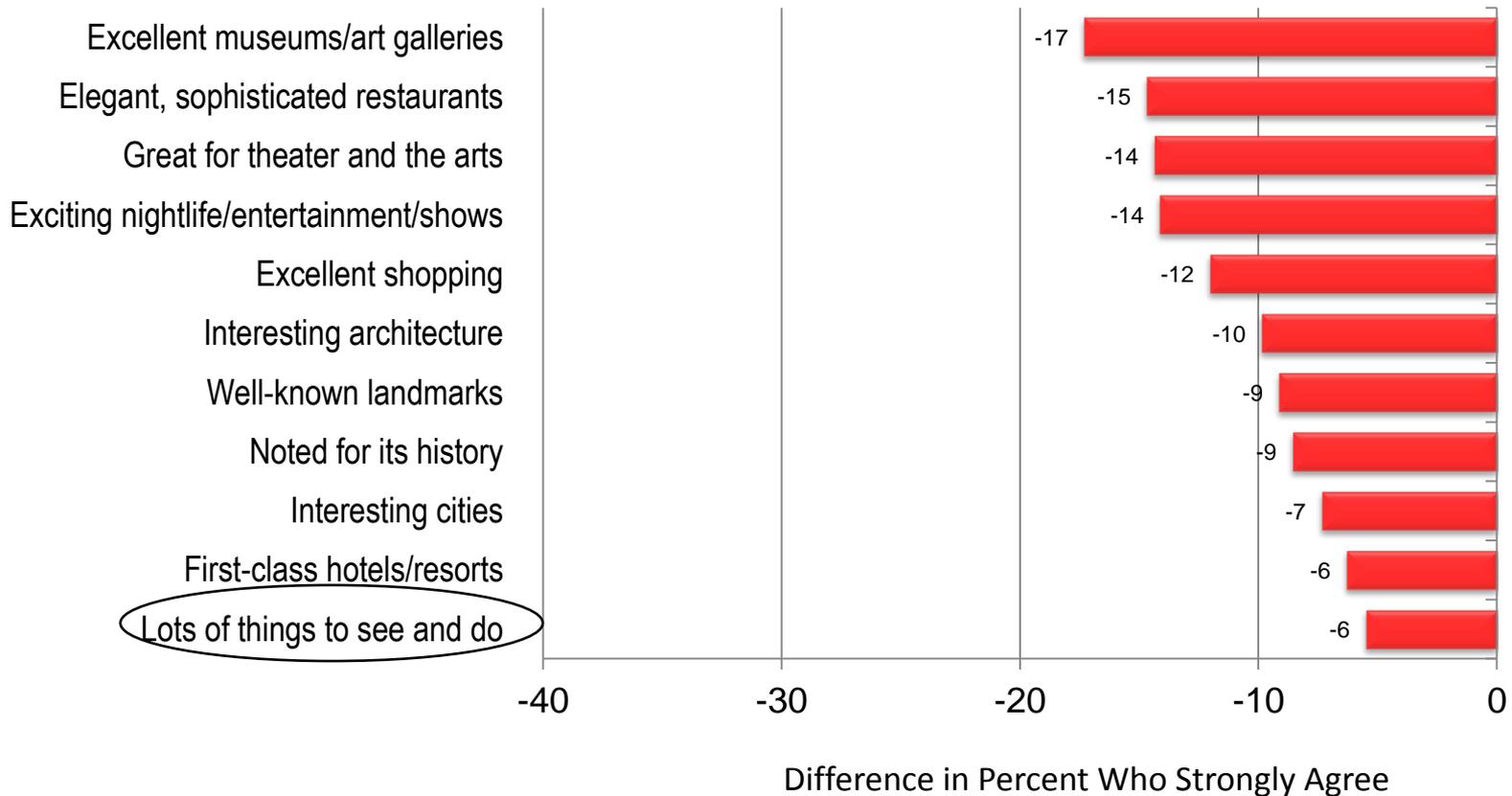


Circled attributes are some of the most important image hot buttons for travelers

Wisconsin's Product Weaknesses



Base: Travelers who visited destination in past two years



Wisconsin's Product Delivery

Wisconsin's Product Delivery



- ⦿ A comparison of the ratings between recent visitors to Wisconsin vs. those who have never actually visited provides a different perspective.
- ⦿ This is essentially the difference between the experiences of those who have been to Wisconsin vs. the expectations of those who have not. When the experience falls short of expectations, there may be a problem with the product. When experience exceeds expectations, there is a great opportunity to educate those who don't know how wonderful Wisconsin is.
- ⦿ The analysis that follows examines recent visitors' image of Wisconsin based on recent experience ("product delivery") compared to the image ratings of those who have never actually visited, i.e. whose perceptions are based on "pure image".

Wisconsin's Product Delivery



- ◉ In this survey people who have visited Wisconsin in the past two years gave Wisconsin substantially higher ratings for every one of the many attributes on which they evaluated the state than people who had never visited.
- ◉ In other words, the first time visitor is very pleasantly surprised by what they experience in Wisconsin.
- ◉ The difference is in many cases so large that the conclusion one could draw is that with such a good product, Wisconsin has more of an awareness problem than a product problem.

Wisconsin's Product Delivery



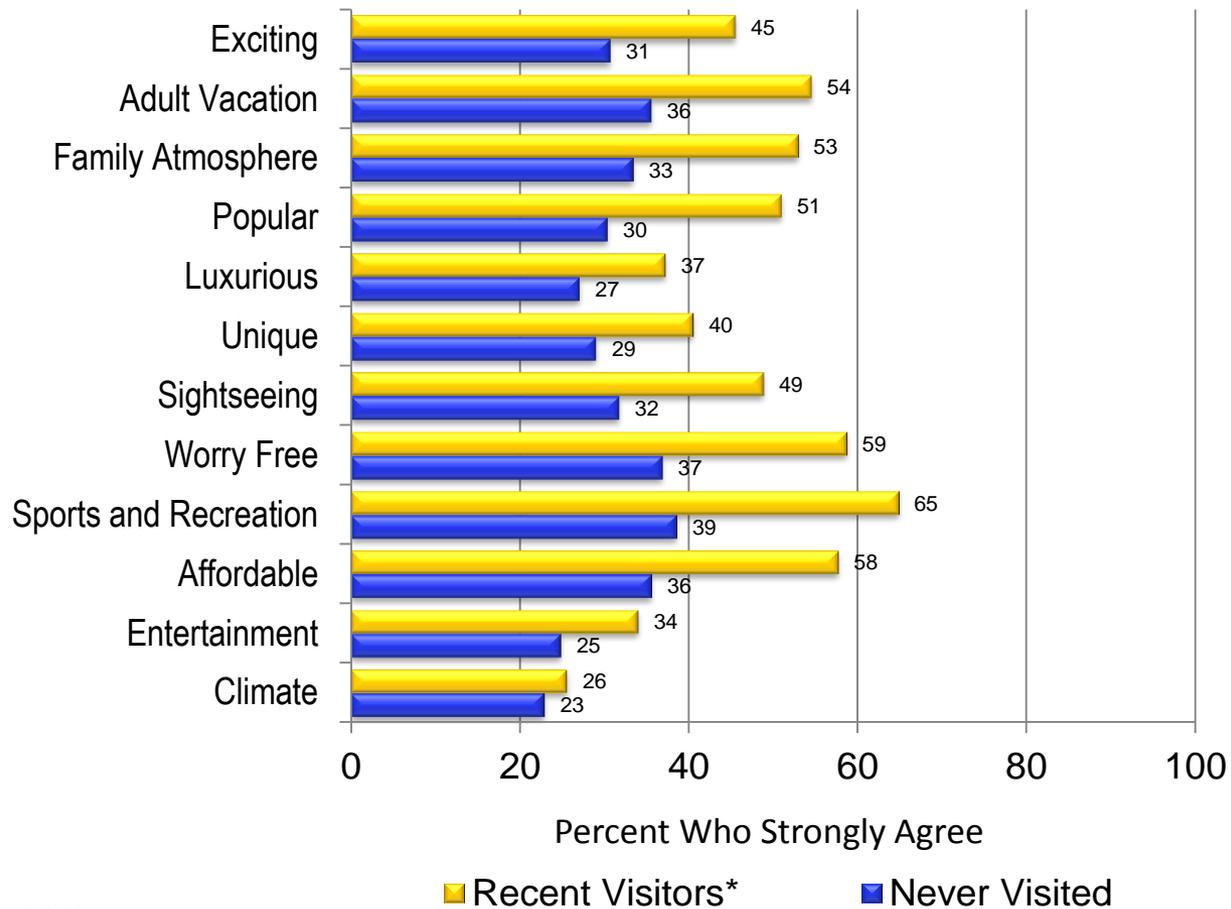
- The greatest differences in “perception vs. reality” are:
 - *outdoor activities such as fishing and exploring nature*
 - *Wisconsin's affordability and accessibility*
 - *Interesting festivals, fairs and events*
 - *A welcoming, relaxing destination with great natural beauty*
 - *Four of the hot buttons: truly beautiful scenery, a fun place for a vacation, excellent state park facilities and a place popular with vacationers (all ten hot buttons are included in the product strengths)*

Because the product delivery is so strong, Wisconsin has the credibility to talk about the most important travel motivators, excitement, adult vacation and family atmosphere, because you can deliver on it.

Wisconsin's Product Delivery vs. Image



Base: Regional Market

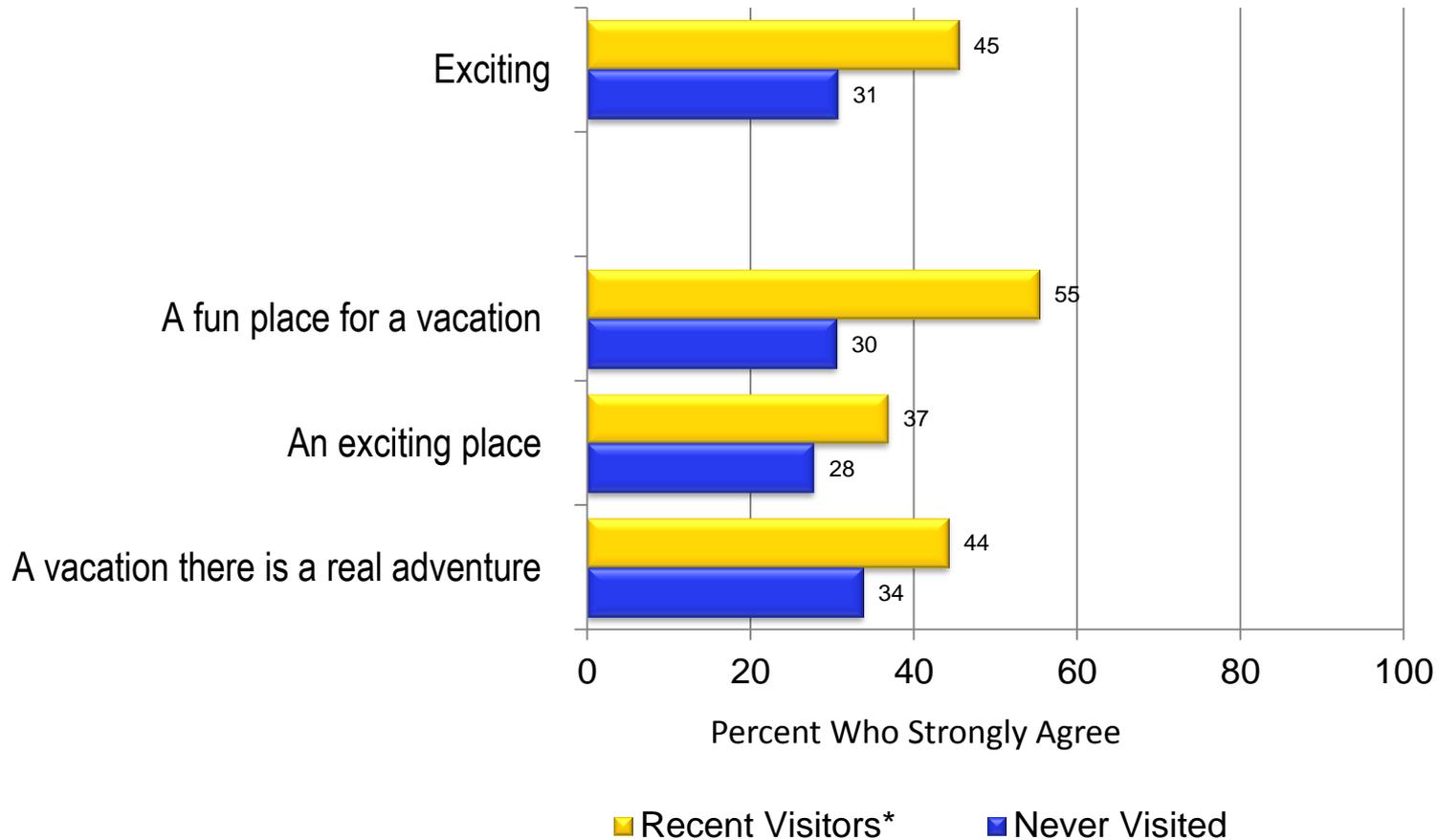


* Visited in past two years

Wisconsin's Product Delivery vs. Image — Exciting



Base: Regional Market

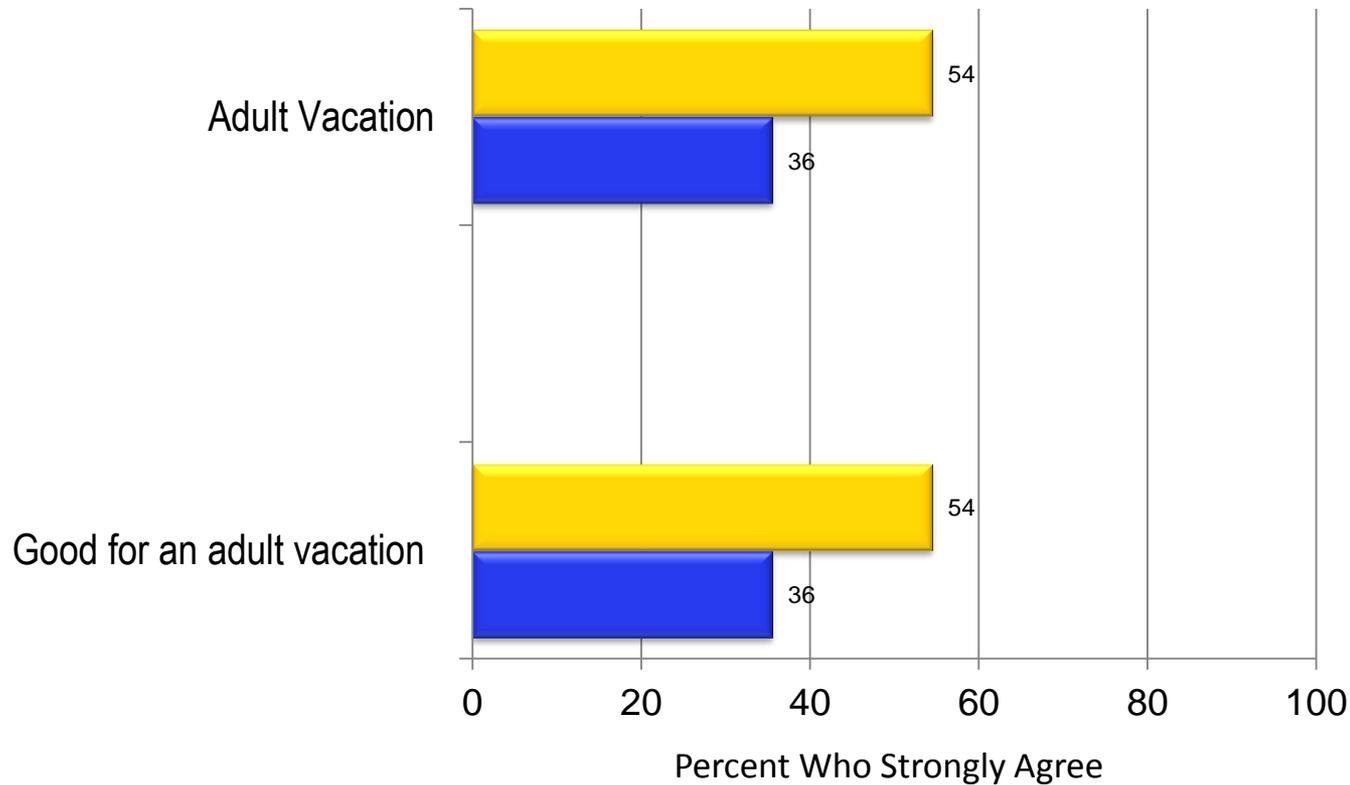


* Visited in past two years

Wisconsin's Product Delivery vs. Image — Adult Vacation



Base: Regional Market



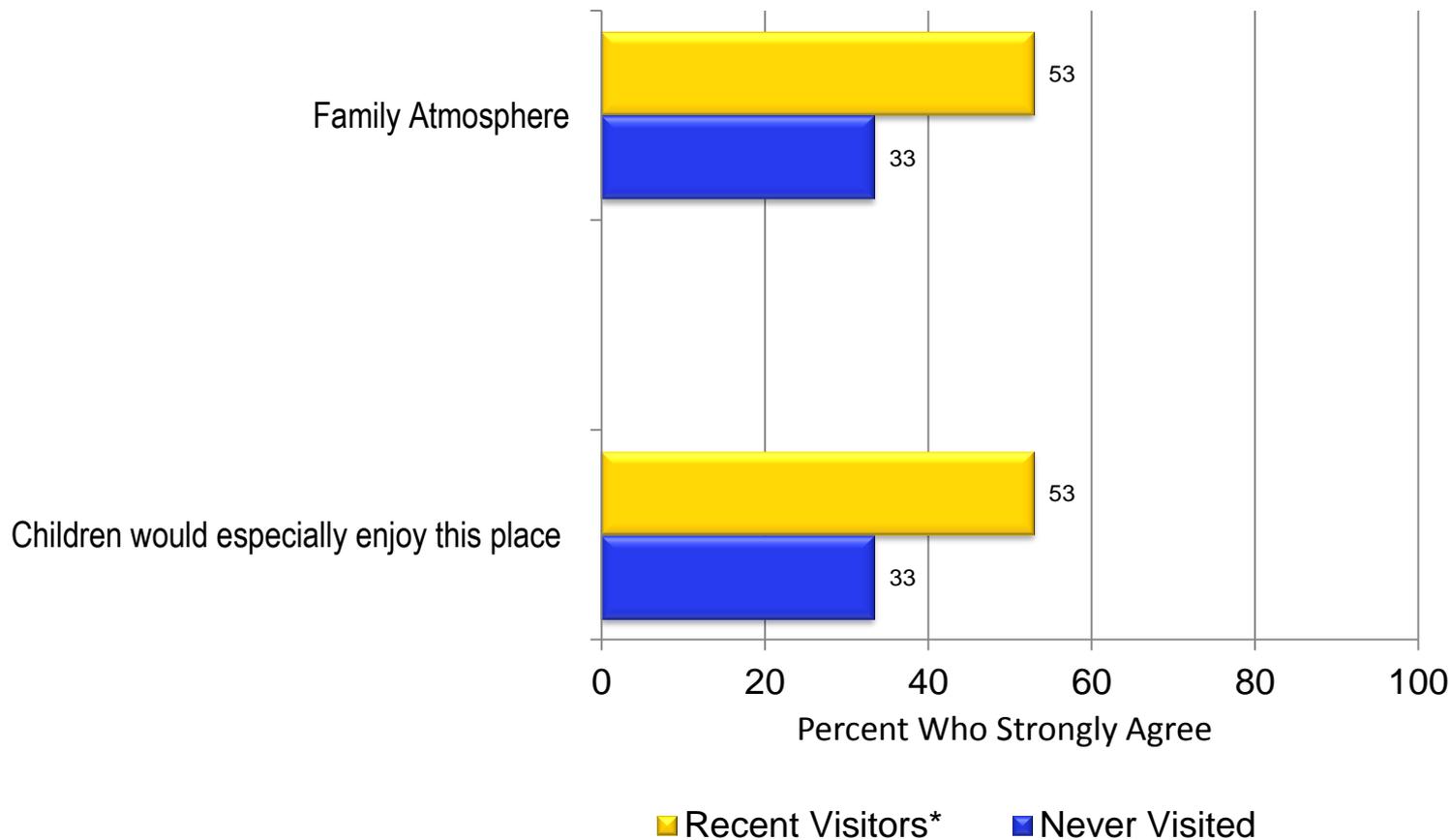
■ Recent Visitors* ■ Never Visited

* Visited in past two years

Wisconsin's Product Delivery vs. Image — Family Atmosphere



Base: Regional Market

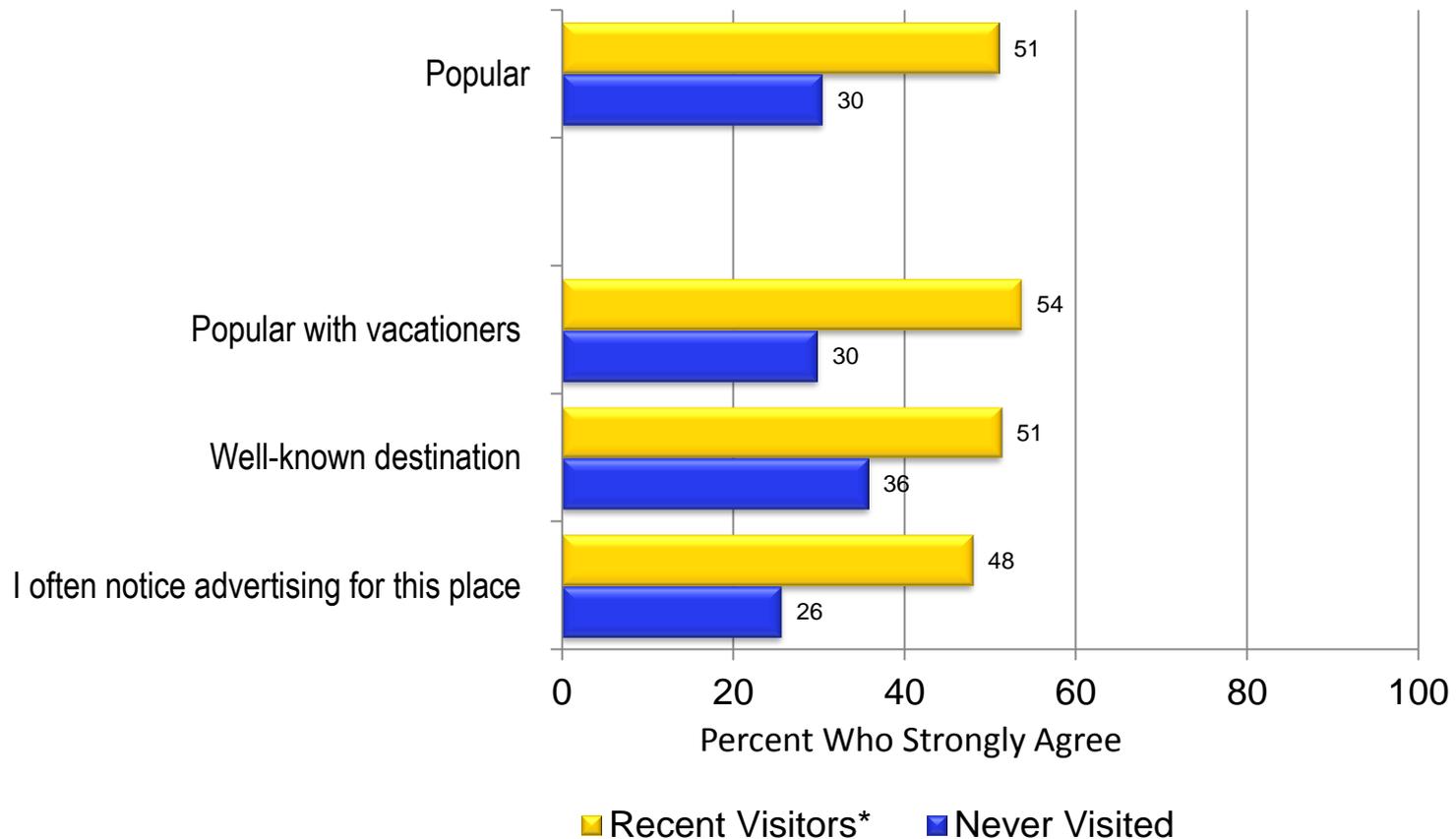


* Visited in past two years

Wisconsin's Product Delivery vs. Image — Popular



Base: Regional Market

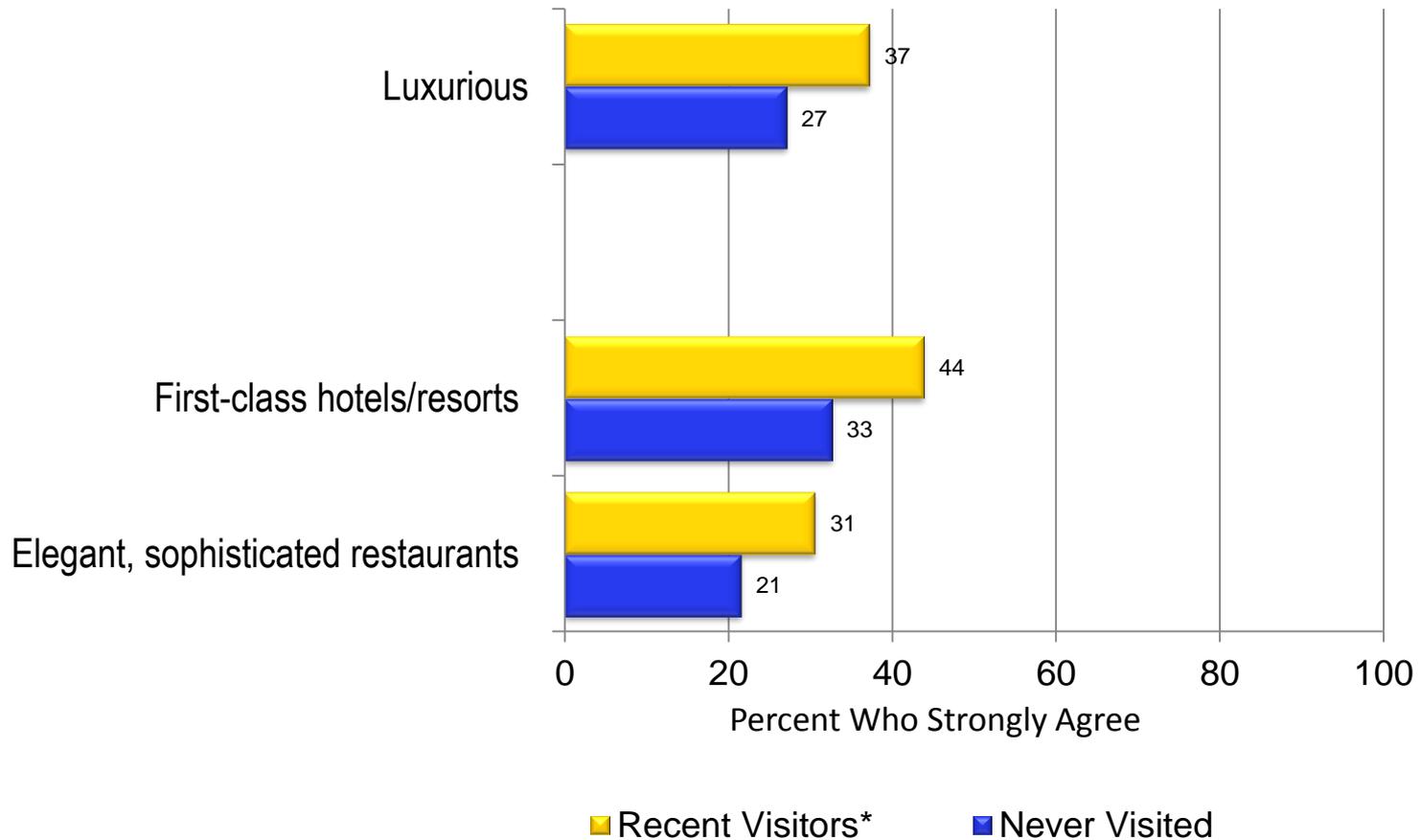


* Visited in past two years

Wisconsin's Product Delivery vs. Image — Luxurious



Base: Regional Market

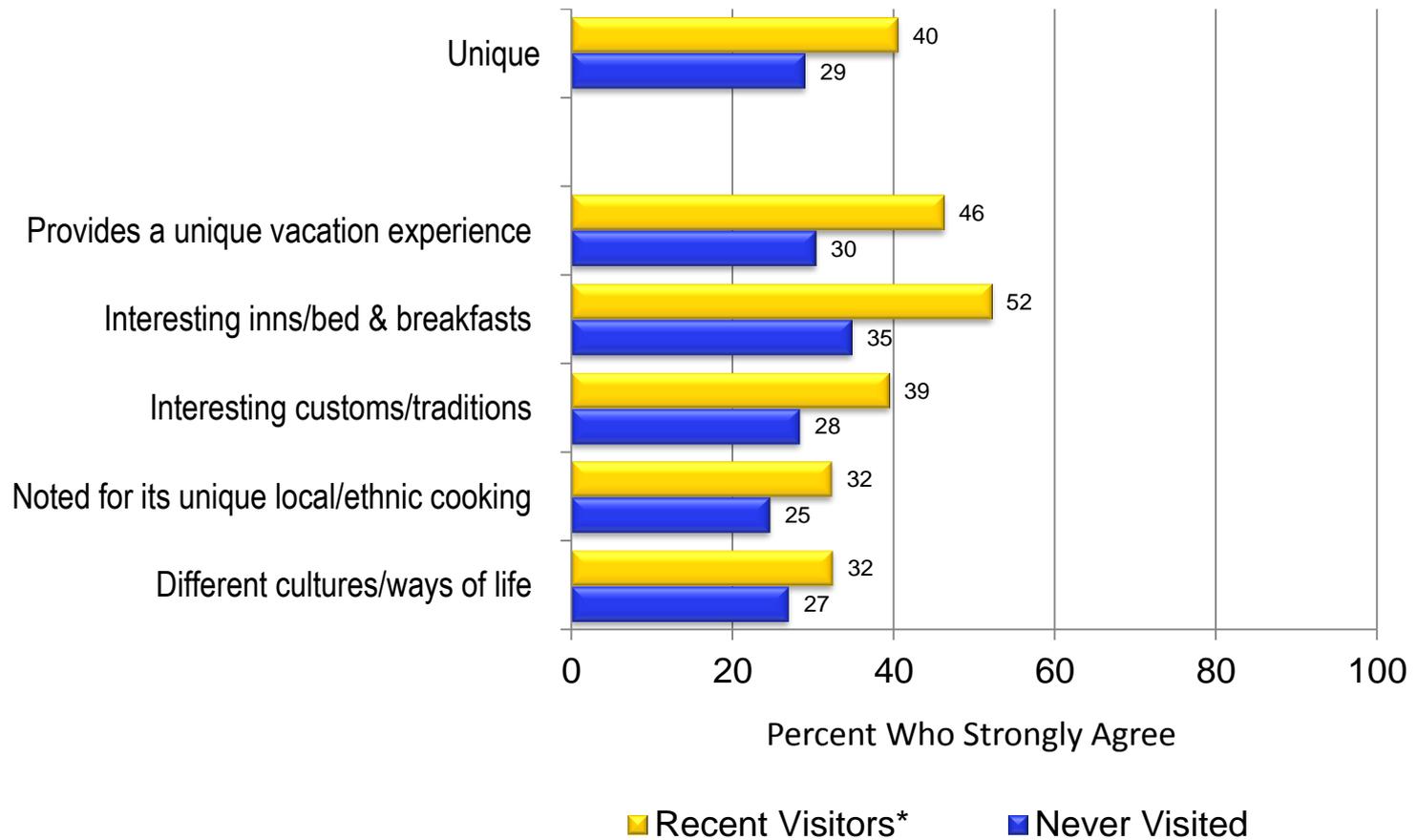


* Visited in past two years

Wisconsin's Product Delivery vs. Image — Unique



Base: Regional Market

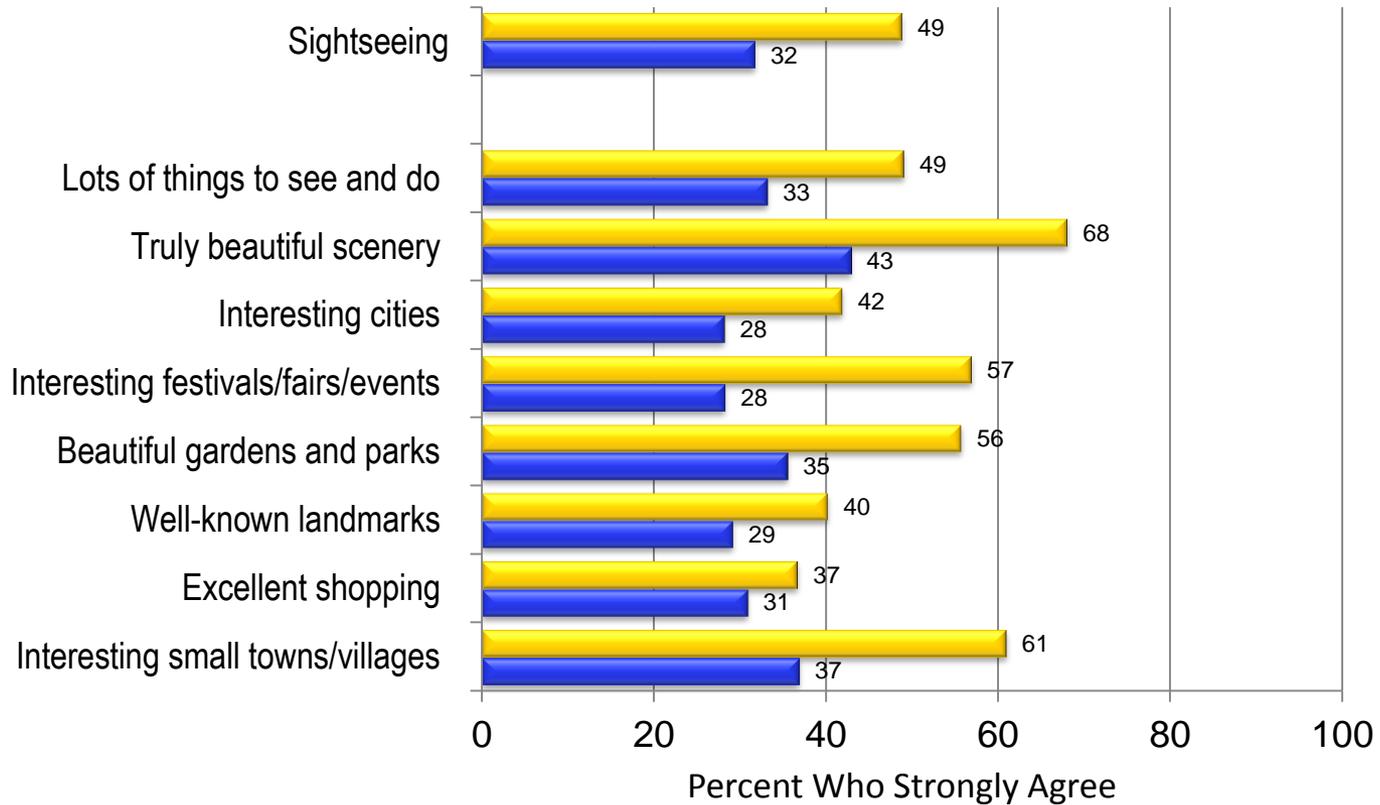


* Visited in past two years

Wisconsin's Product Delivery vs. Image — Sightseeing



Base: Regional Market



■ Recent Visitors*

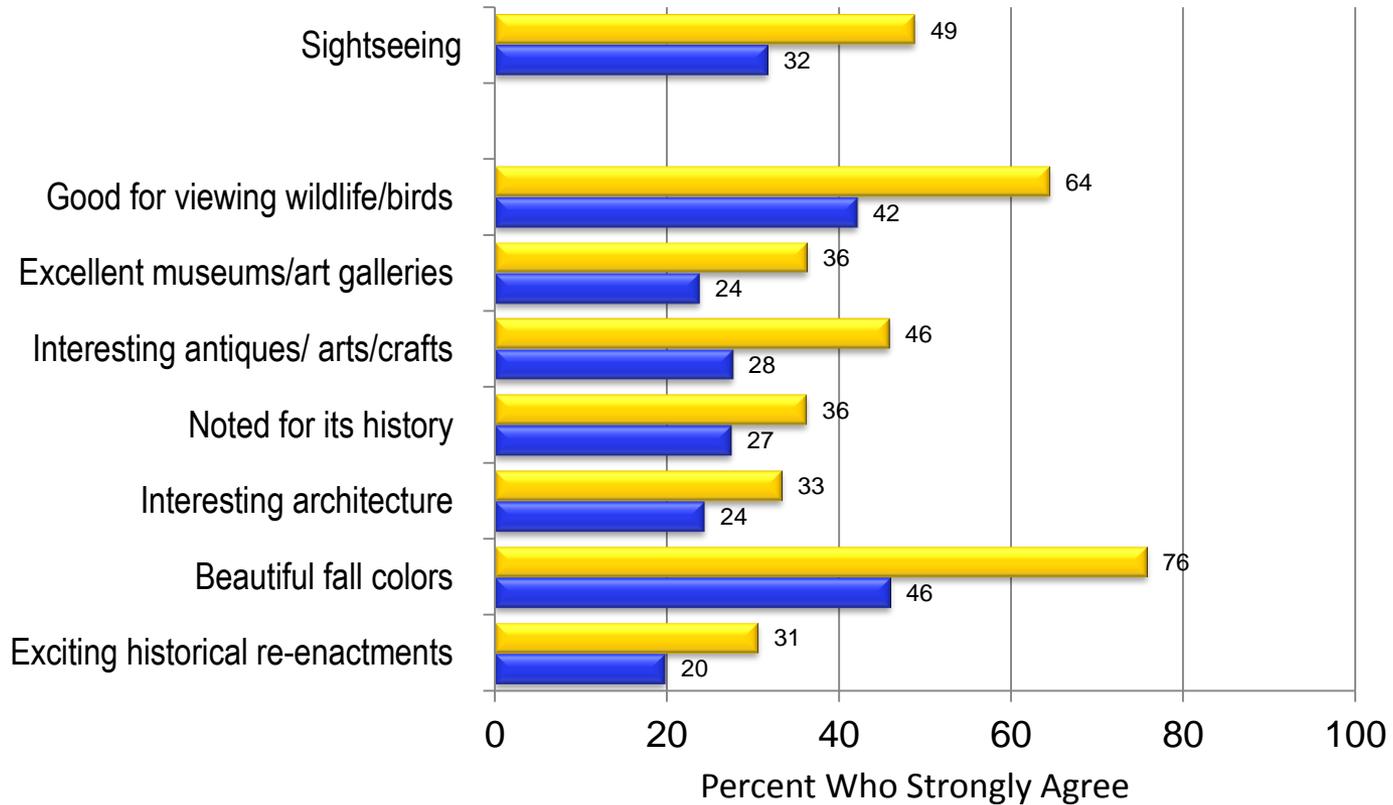
■ Never Visited

* Visited in past two years

Wisconsin's Product Delivery vs. Image — Sightseeing (Cont'd)



Base: Regional Market



■ Recent Visitors*

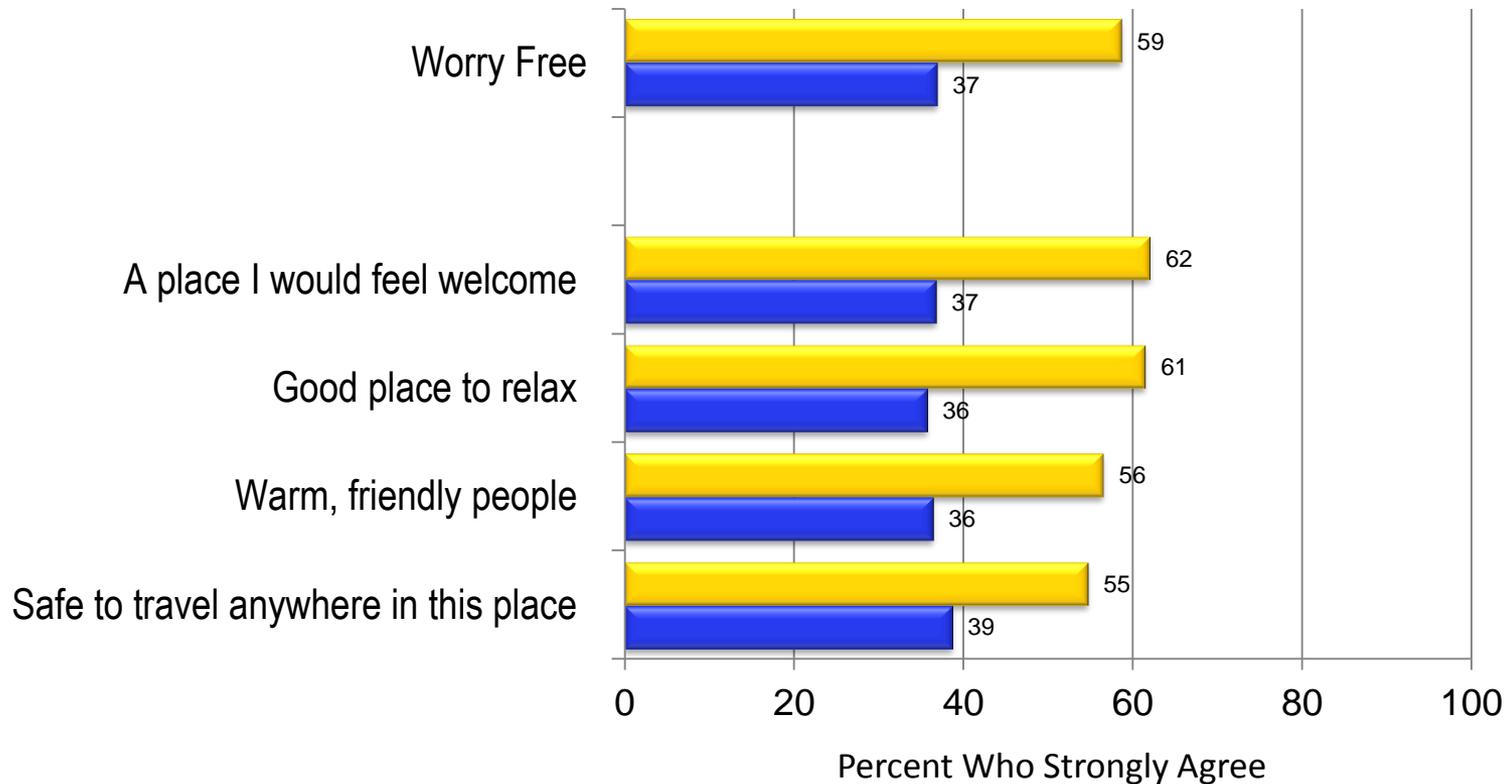
■ Never Visited

* Visited in past two years

Wisconsin's Product Delivery vs. Image — Worry Free



Base: Regional Market



■ Recent Visitors*

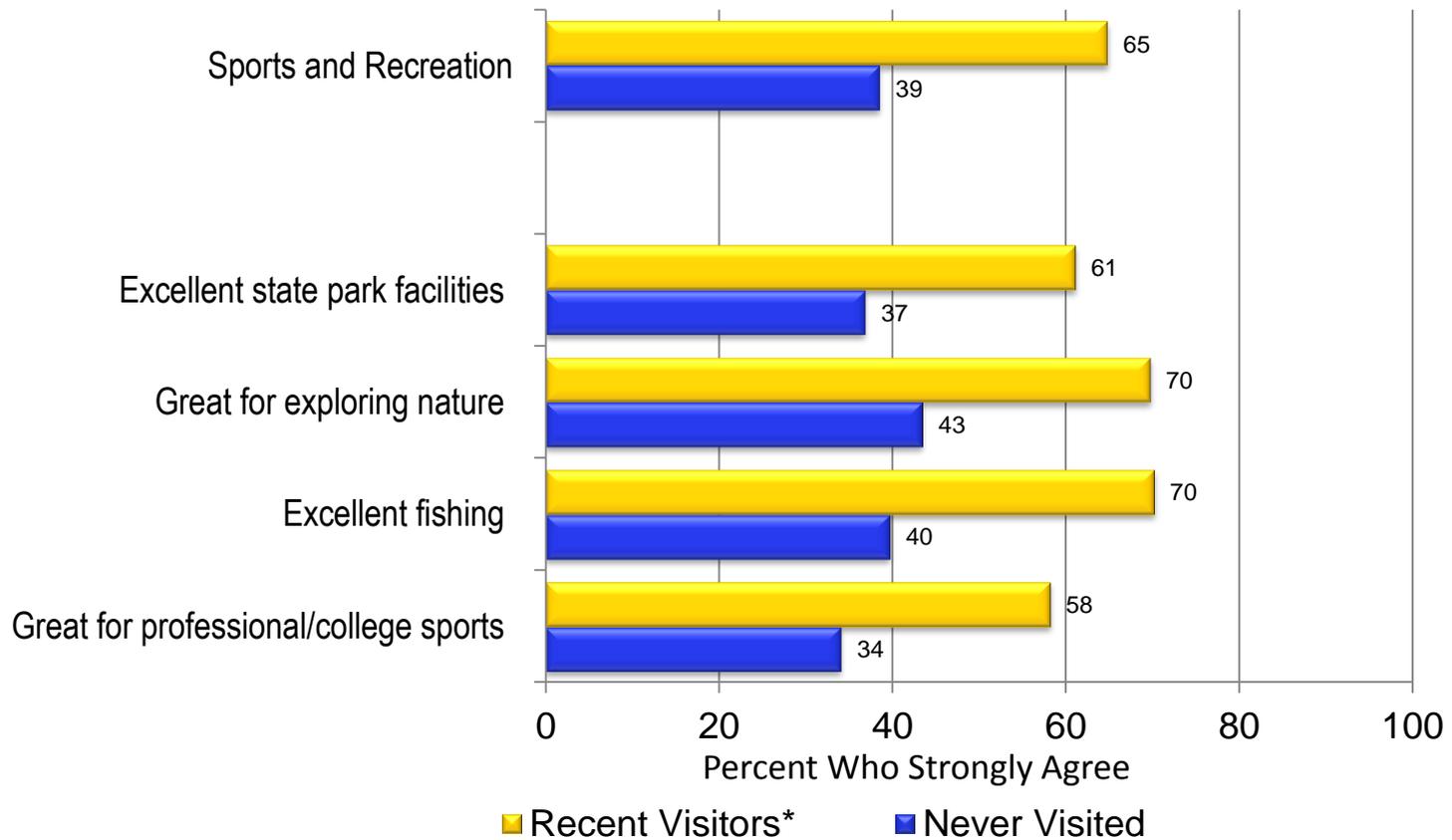
■ Never Visited

* Visited in past two years

Wisconsin's Product Delivery vs. Image — Sports and Recreation



Base: Regional Market

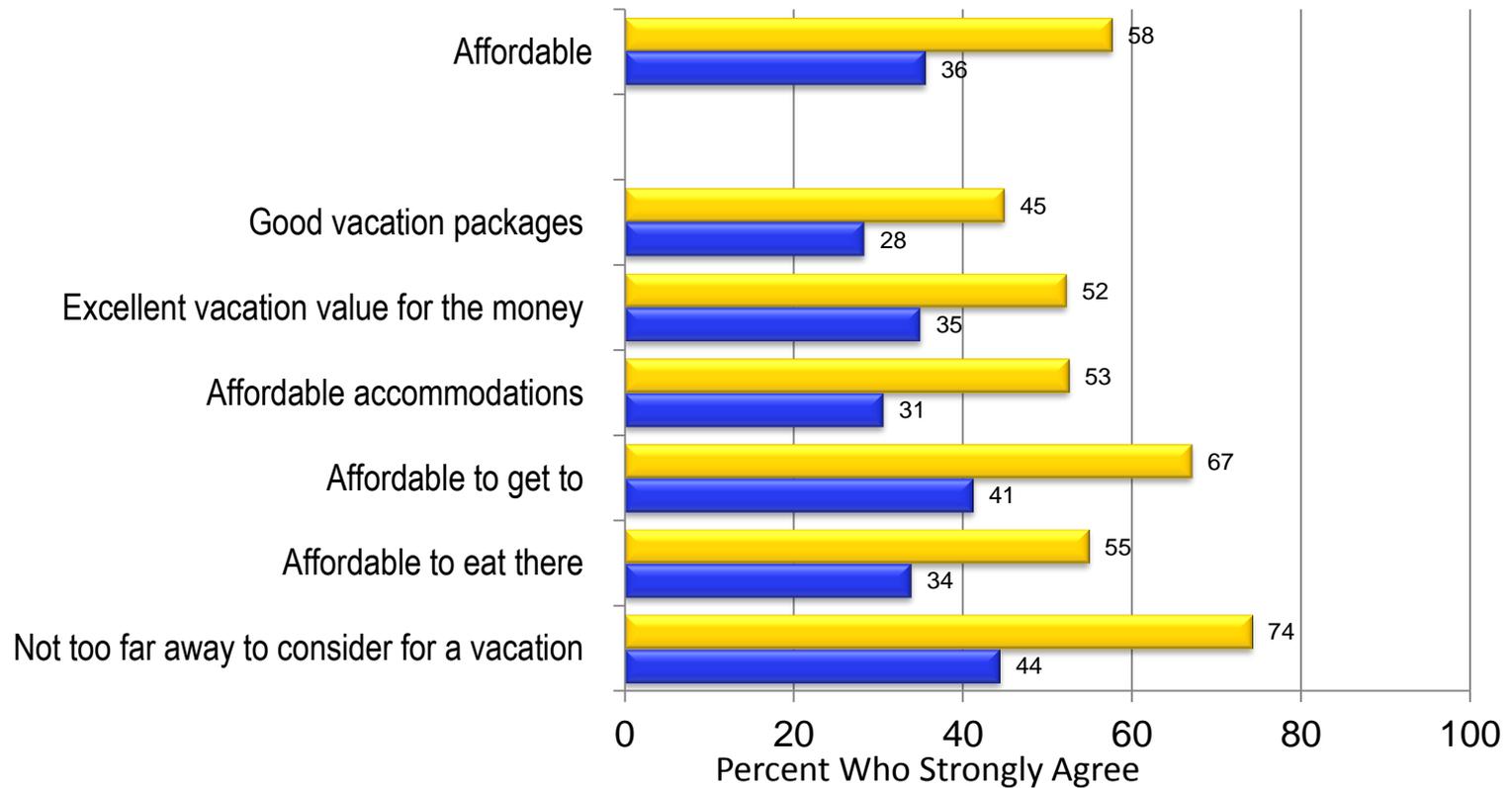


* Visited in past two years

Wisconsin's Product Delivery vs. Image — Affordable



Base: Regional Market



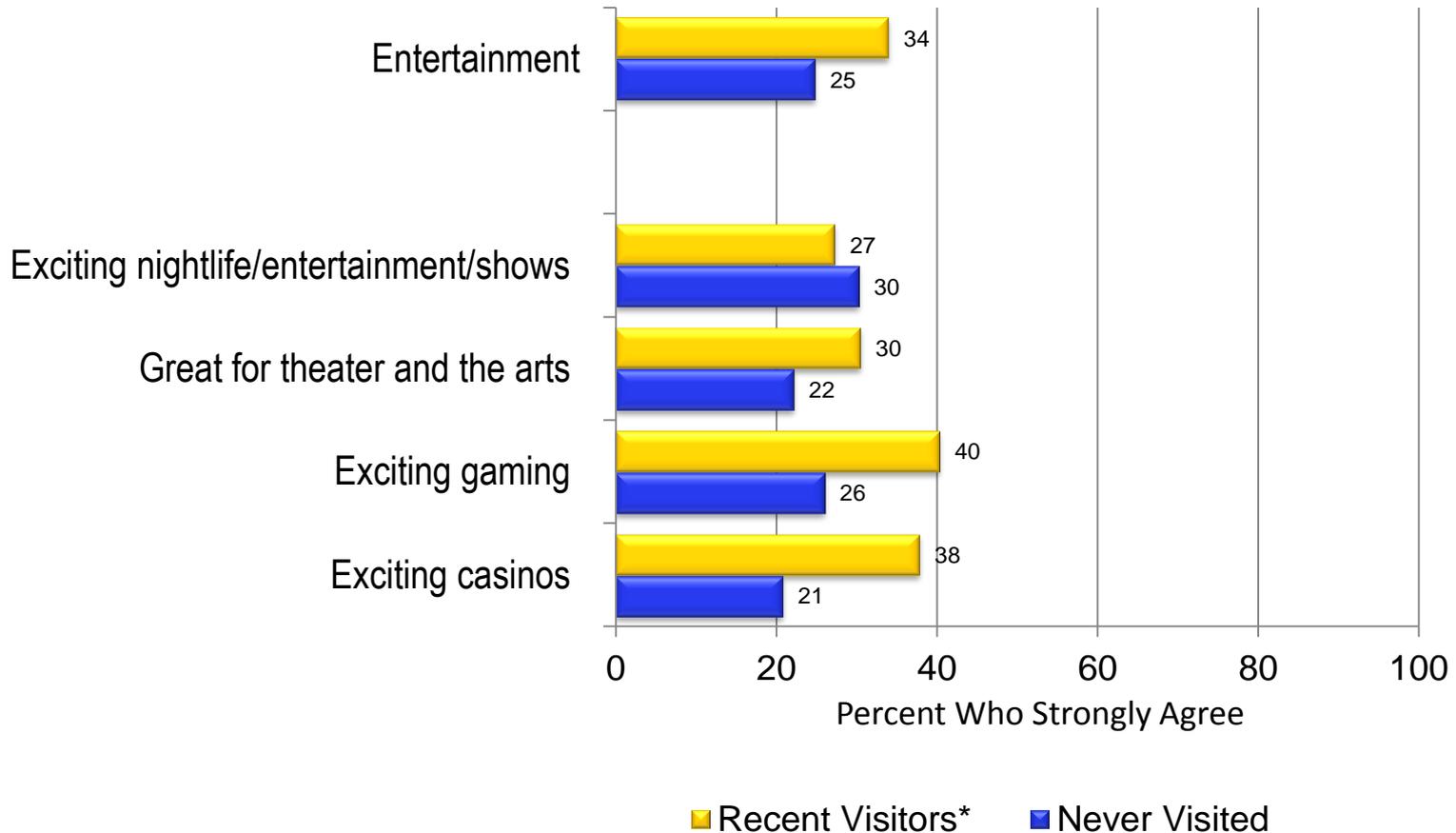
■ Recent Visitors* ■ Never Visited

* Visited in past two years

Wisconsin's Product Delivery vs. Image — Entertainment



Base: Regional Market

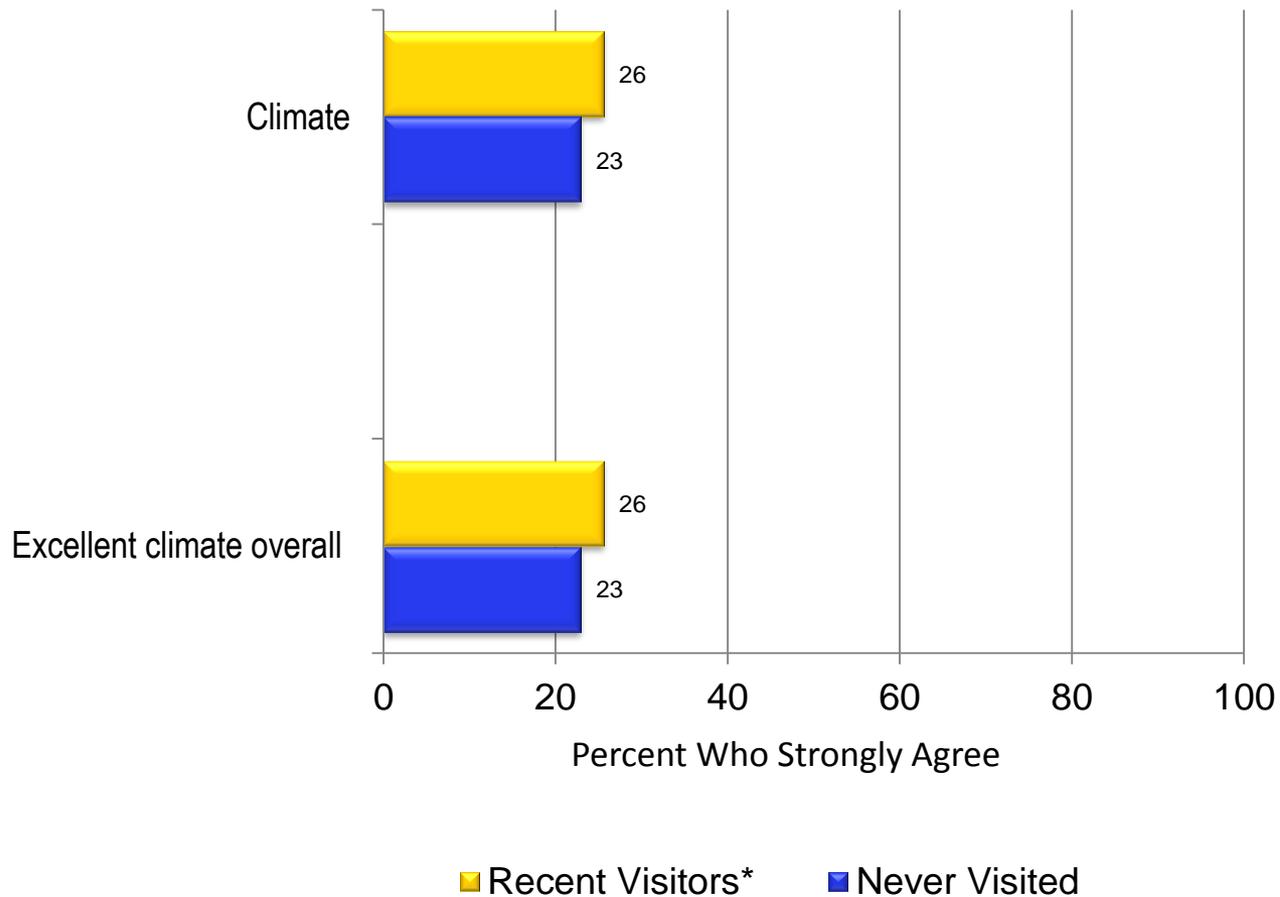


* Visited in past two years

Wisconsin's Product Delivery vs. Image — Climate



Base: Regional Market

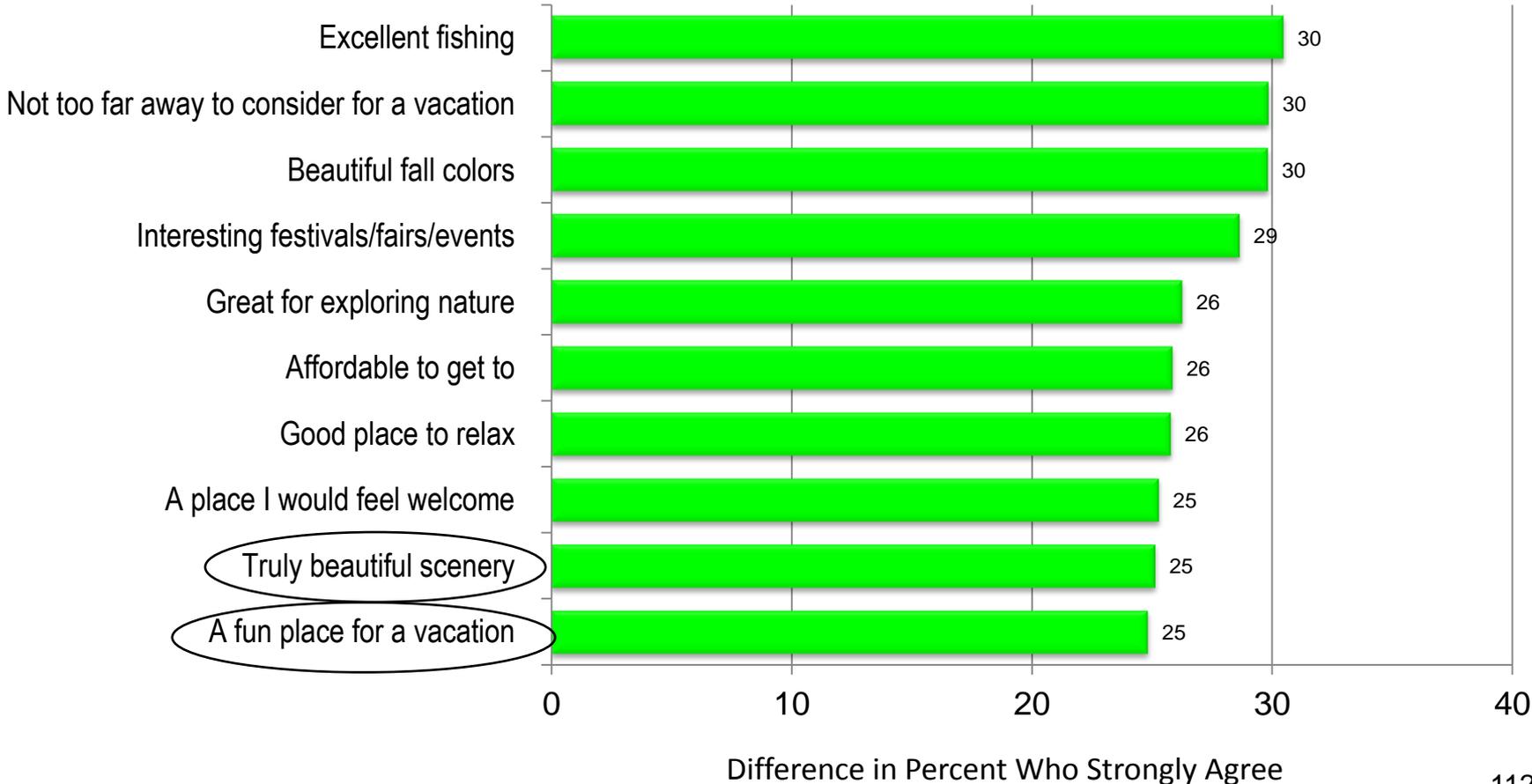


* Visited in past two years

Wisconsin's Product Strengths vs. Image



Base: Regional Market



Truly beautiful scenery

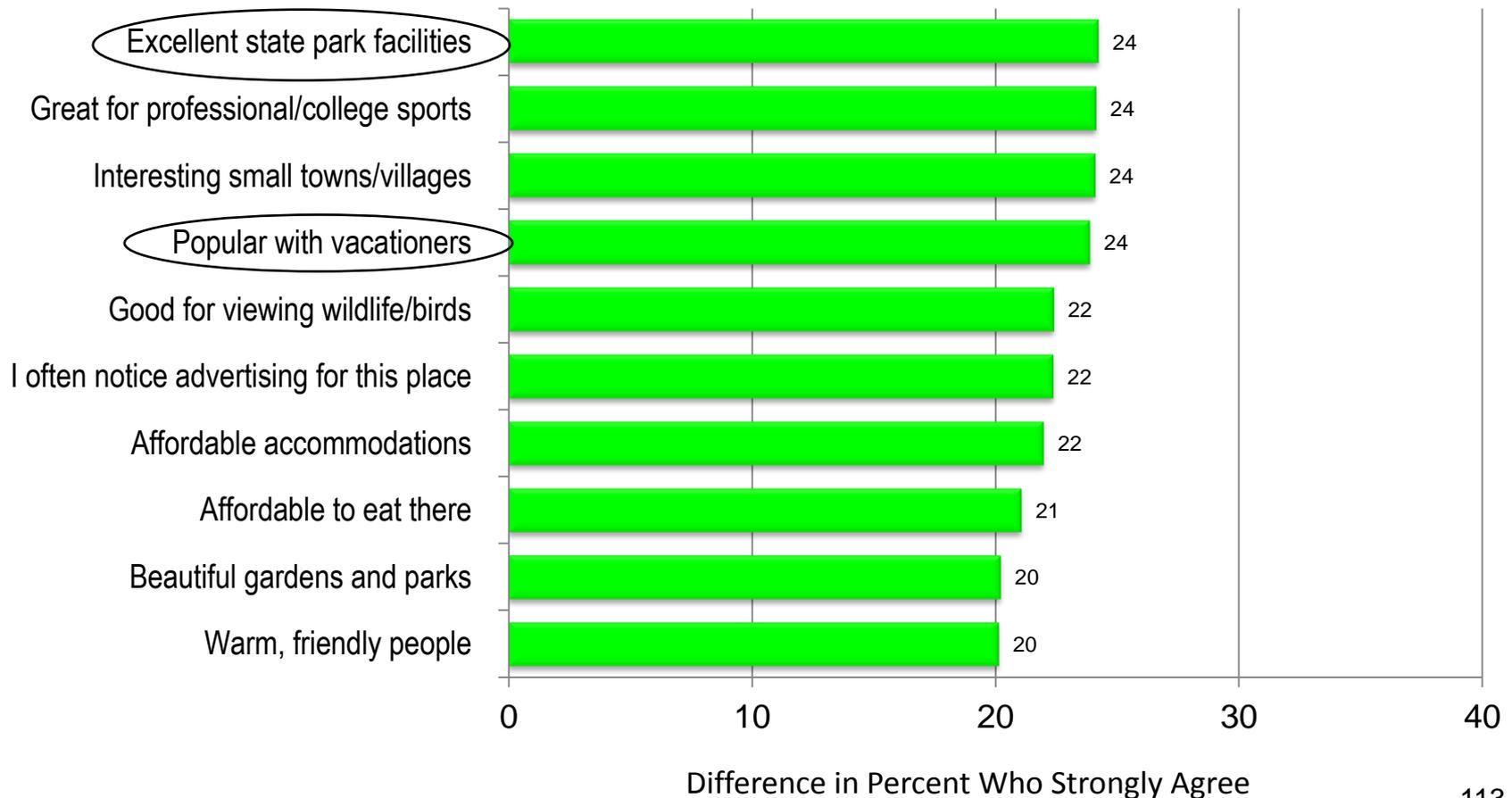
A fun place for a vacation

Circled attributes are some of the most important image hot buttons for travelers

Wisconsin's Product Strengths vs. Image (Cont'd)



Base: Regional Market

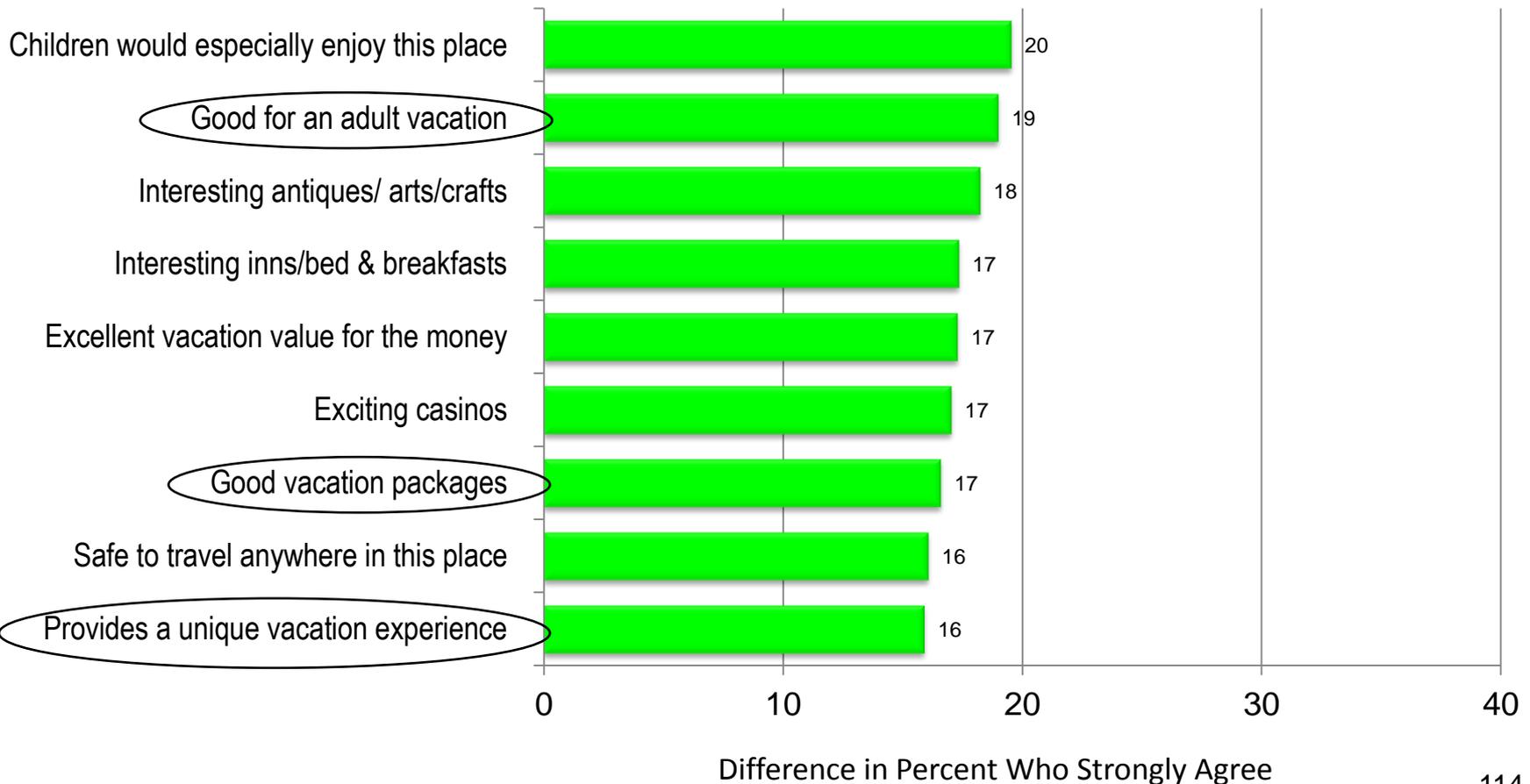


Circled attributes are some of the most important image hot buttons for travelers

Wisconsin's Product Strengths vs. Image (Cont'd)



Base: Regional Market

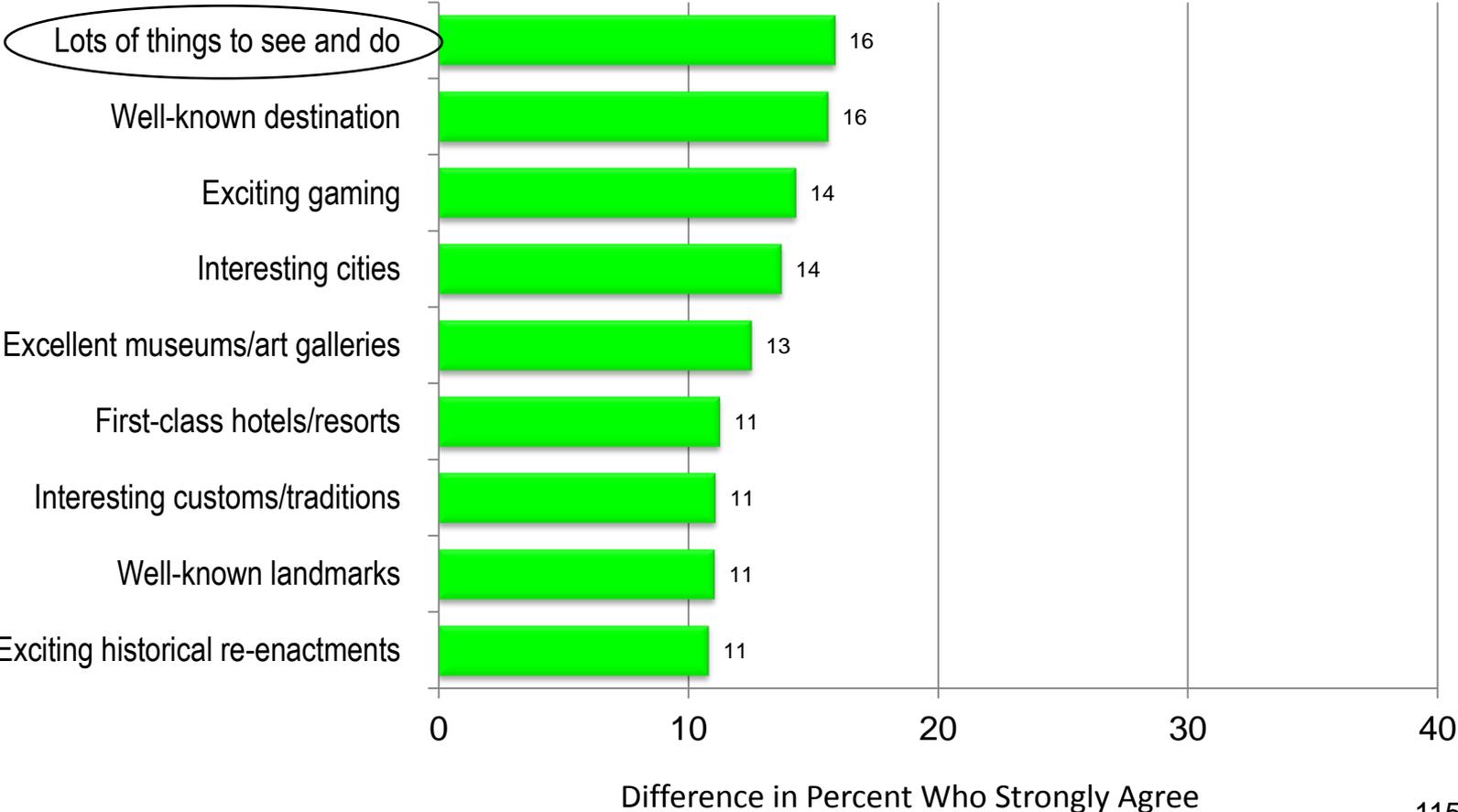


Difference in Percent Who Strongly Agree

Wisconsin's Product Strengths vs. Image (Cont'd)



Base: Regional Market

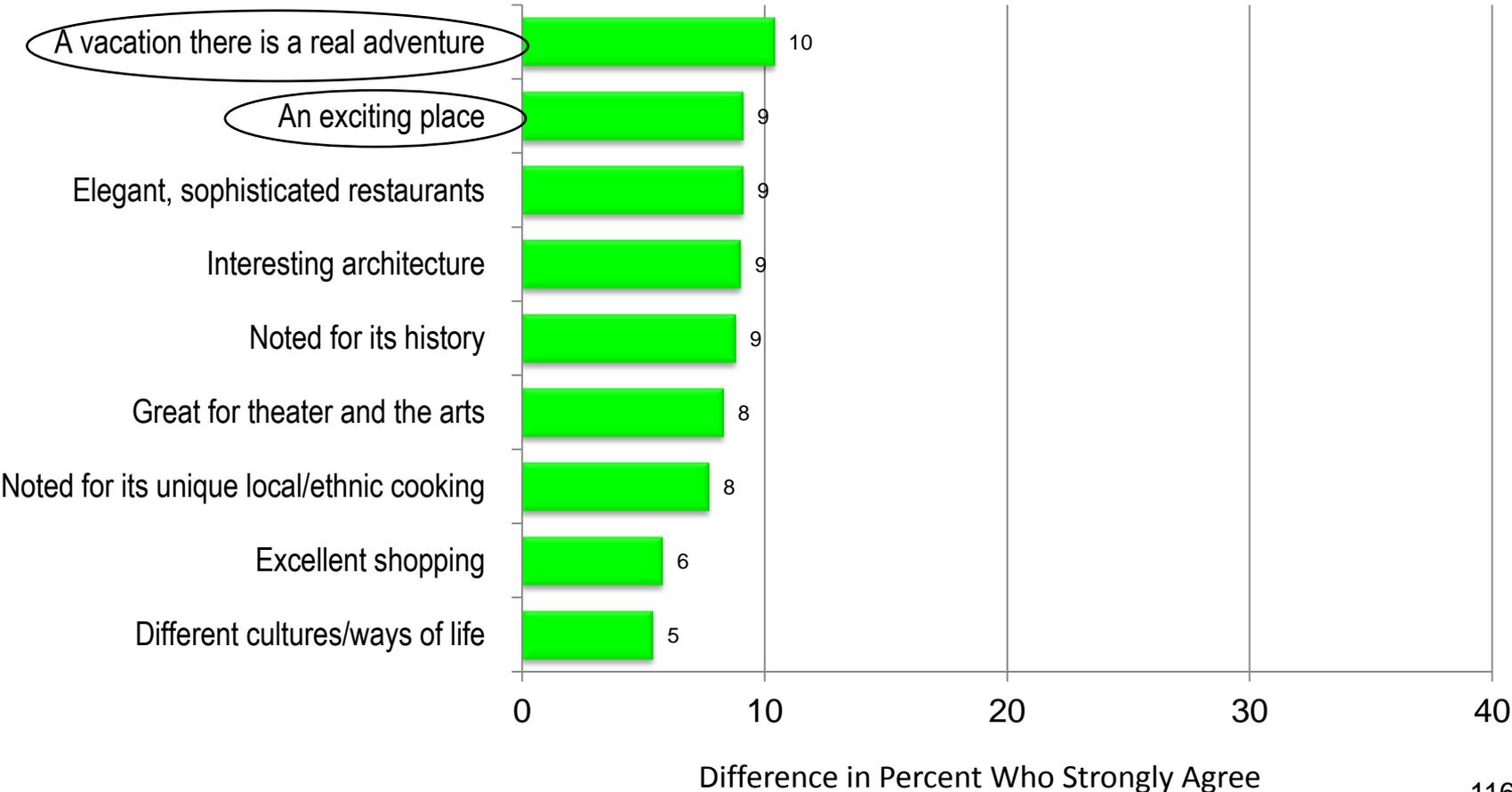


Circled attributes are some of the most important image hot buttons for travelers

Wisconsin's Product Strengths vs. Image (Cont'd)



Base: Regional Market



Circled attributes are some of the most important image hot buttons for travelers

Wisconsin's Product Weaknesses vs. Image



**No Product Weaknesses
vs. Image**

Advertising Evaluation

Creative

Longwoods INTERNATIONAL

TRAVEL WISCONSIN .COM

PINSANITY
CAMP WISCONSIN

FUN COVERS THE WHOLE STATE

TRAVEL WISCONSIN .COM

DISCOVER THE MERITS OF FUN

TRAVEL WISCONSIN .COM

GET THE FALL COLOR REPORT

TRAVEL WISCONSIN .COM

CAMP WISCONSIN
IT COVERS THE WHOLE STATE

TRAVEL WISCONSIN .COM

TRAVEL WISCONSIN .COM

Add some color to your fall WITH THESE SCENIC DRIVES

TRAVEL WISCONSIN .COM

HUE HOPPER
CAMP WISCONSIN

Fall has its merits

GET THE FALL COLOR REPORT

CAMP WISCONSIN
IT COVERS THE WHOLE STATE

TRAVEL WISCONSIN .COM

CAMP WISCONSIN
IT COVERS THE WHOLE STATE

TRAVEL WISCONSIN .COM

TRAVEL WISCONSIN .COM

DISCOVER THE MERITS OF FUN

AQUANUT
CAMP WISCONSIN

TRAVEL WISCONSIN .COM

DISCOVER THE MERITS OF FUN

WATER BUG
CAMP WISCONSIN

TRAVEL WISCONSIN .COM DISCOVER THE MERITS OF FUN

CLICK TO EXPAND

Impact of the Advertising on Image

Impact of the Advertising on Wisconsin's Image

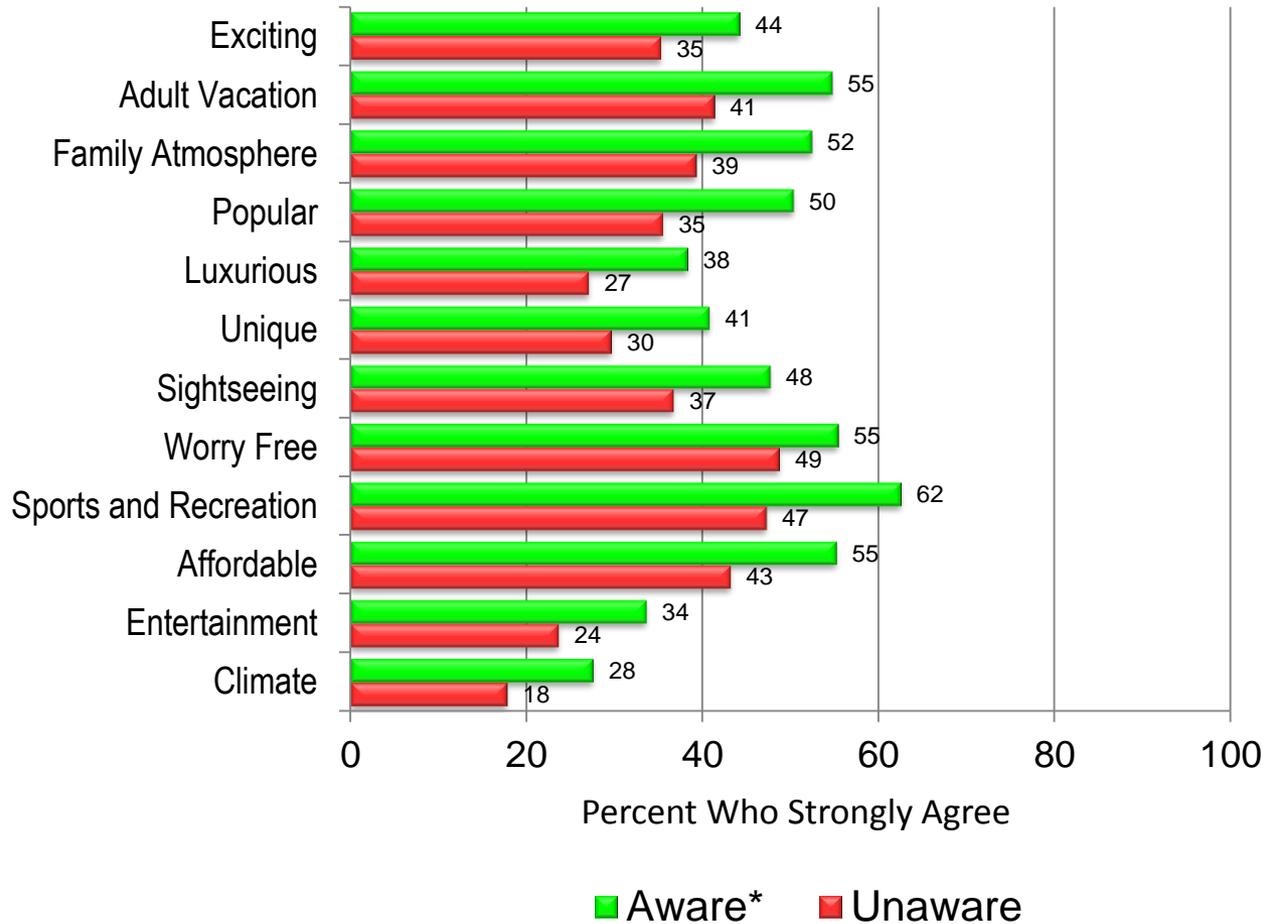


- Respondents who recalled seeing the advertising rated the state's image as a travel destination higher than respondents who did not recall seeing the advertising.
- All ten communications "Hot Buttons" were positively impacted by the advertising

Impact of 2014 Advertising on Wisconsin's Image



Base: Total Travelers

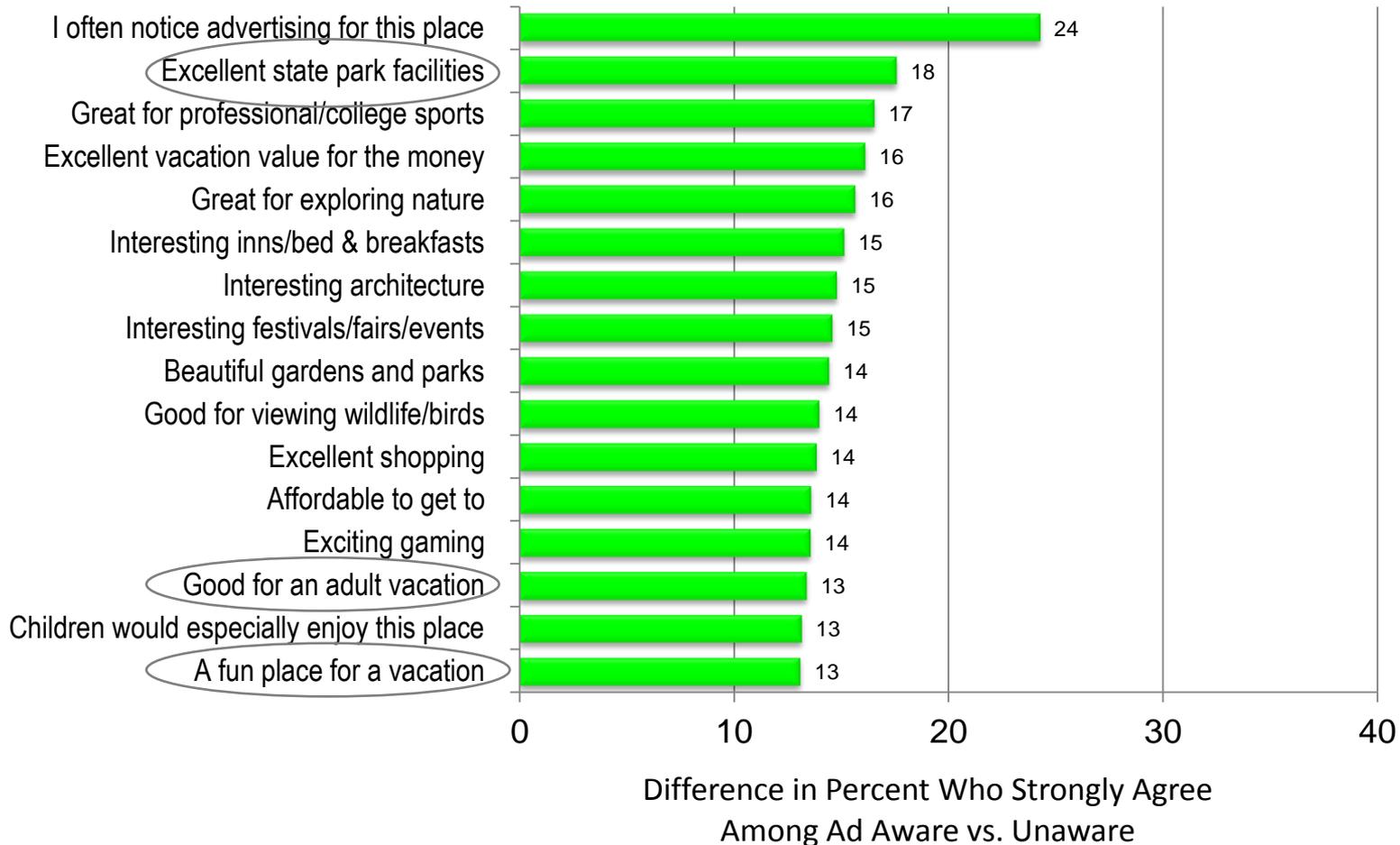


* Saw at least one ad

Attributes On Which Advertising Had The Most Impact



Base: Total Travelers

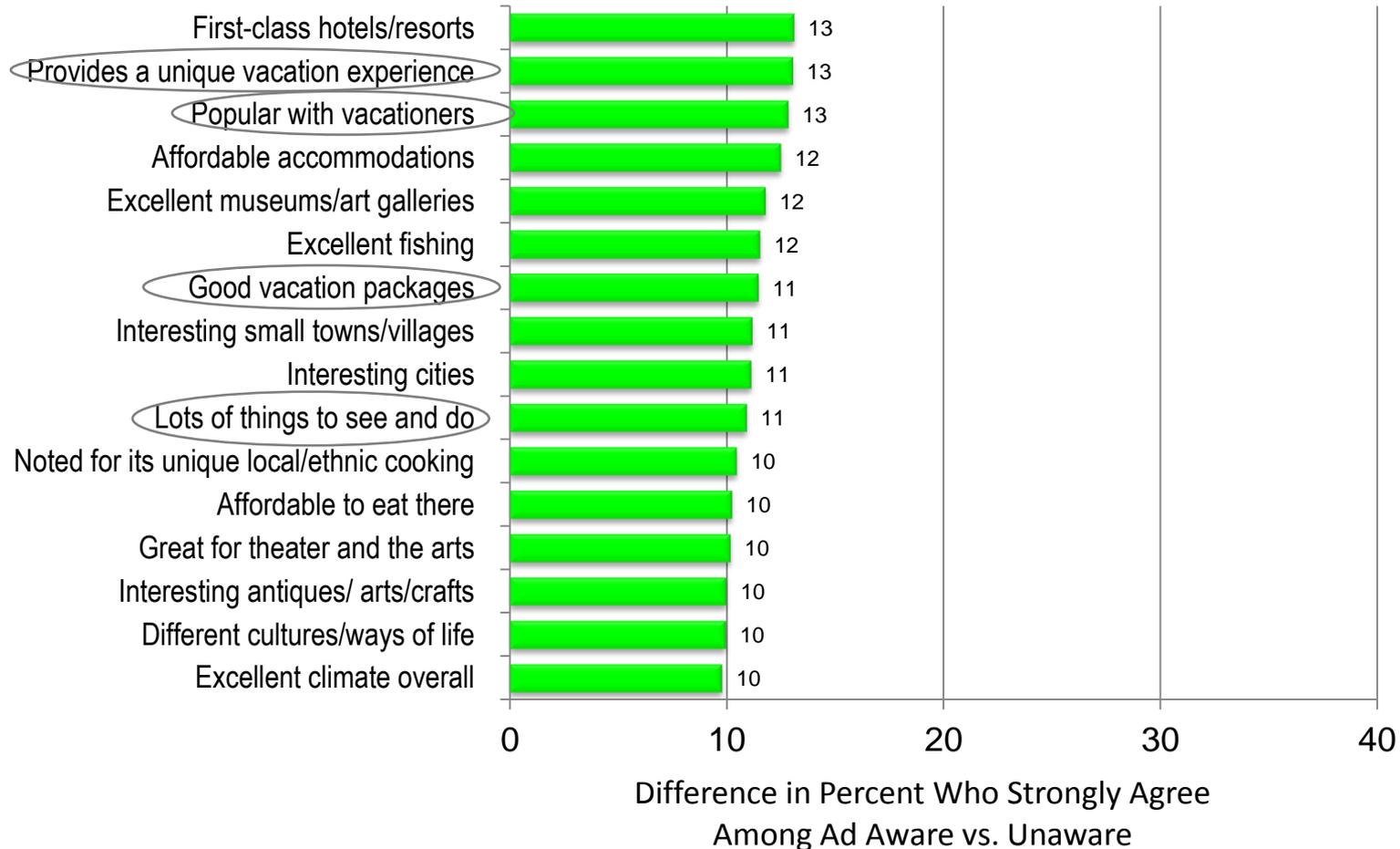


*Circled attributes are some of the most important image hot buttons for travelers

Attributes On Which Advertising Had The Most Impact (Cont'd)



Base: Total Travelers

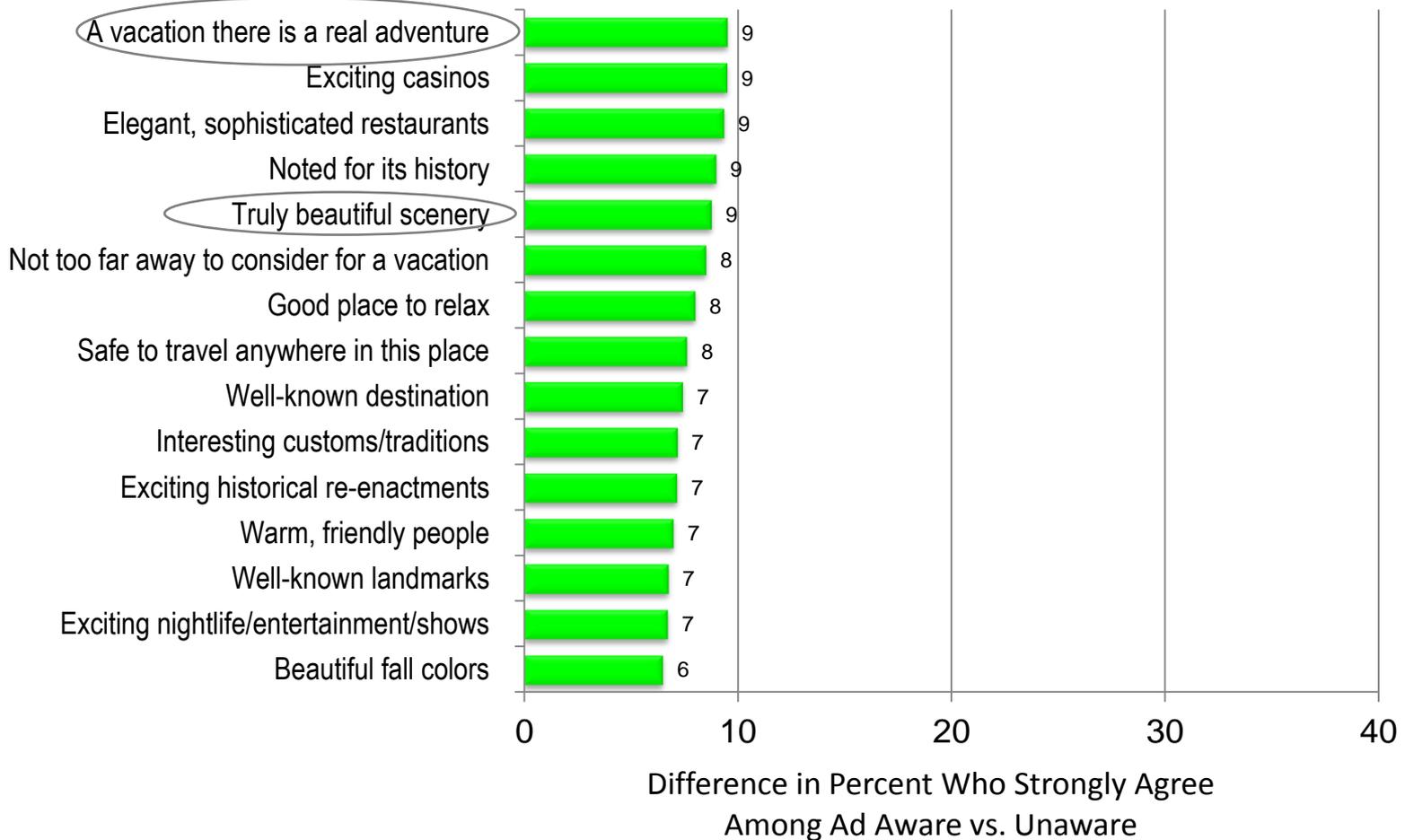


*Circled attributes are some of the most important image hot buttons for travelers

Attributes On Which Advertising Had The Most Impact (Cont'd)



Base: Total Travelers



*Circled attributes are some of the most important image hot buttons for travelers

Advertising Awareness

Advertising Impacts Short-of-Sales

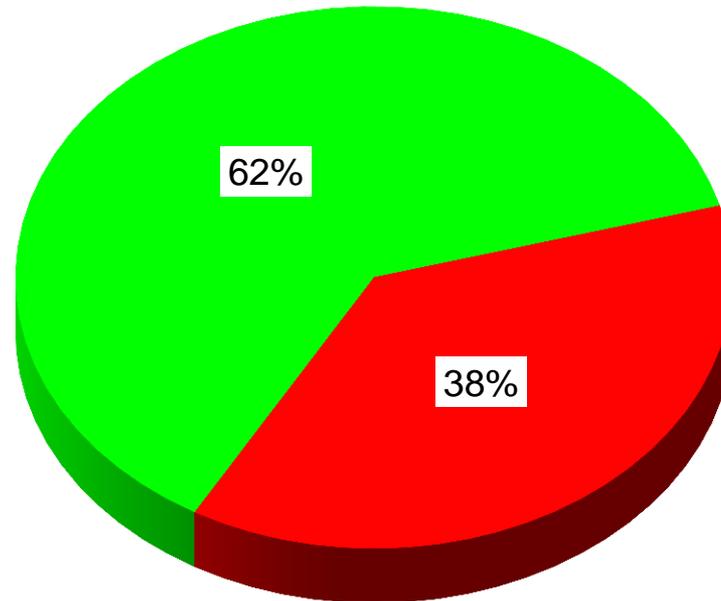


- 62% of the respondents recalled seeing at least one of Wisconsin's travel ads:
 - Among those who saw Wisconsin ads in several types of media, ad recall was highest for TV ads (43%), followed by digital ads (41%). Among those who only saw ads in one medium, TV ads also led with recall of 18%, followed by digital at 7%.

Awareness of 2014 Advertising



Base: Total Region

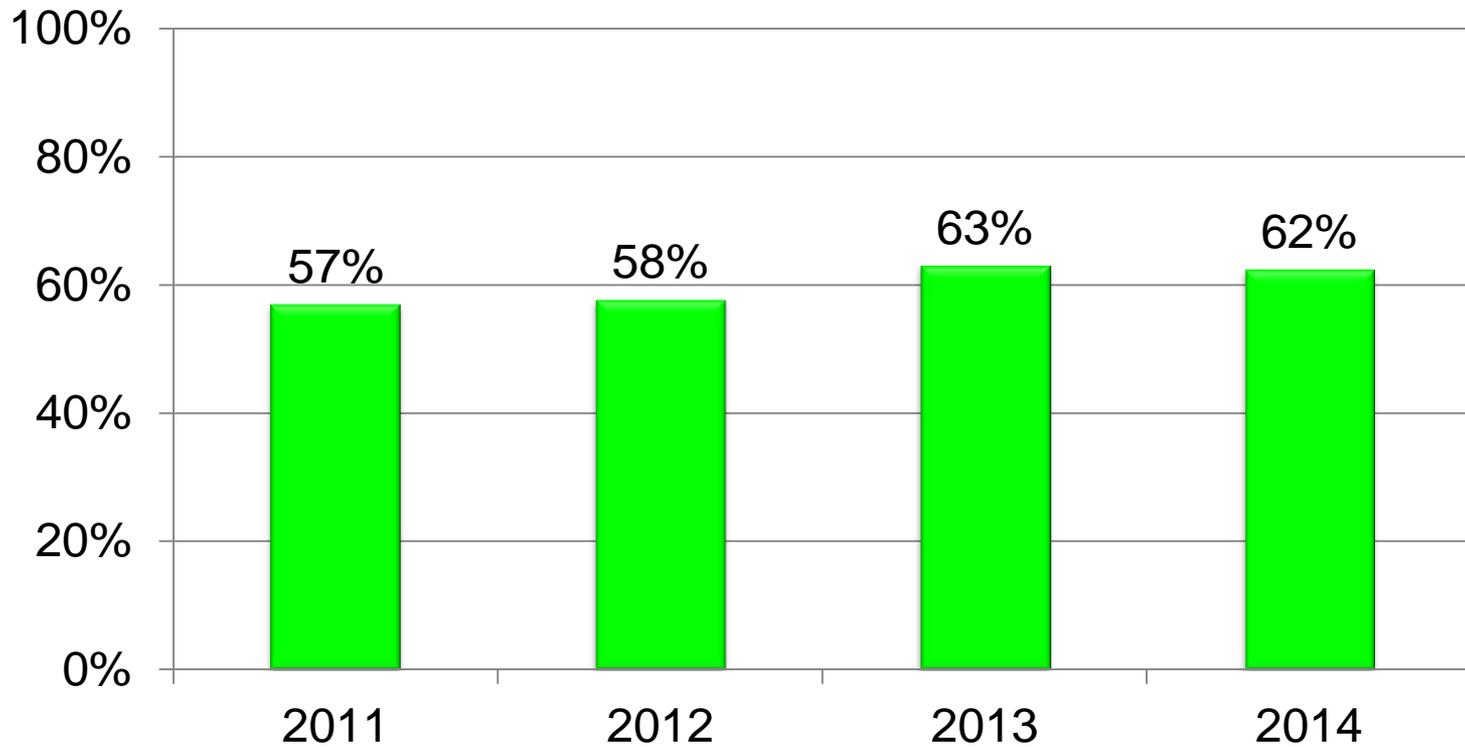


■ Aware ■ Unaware

Awareness of Advertising



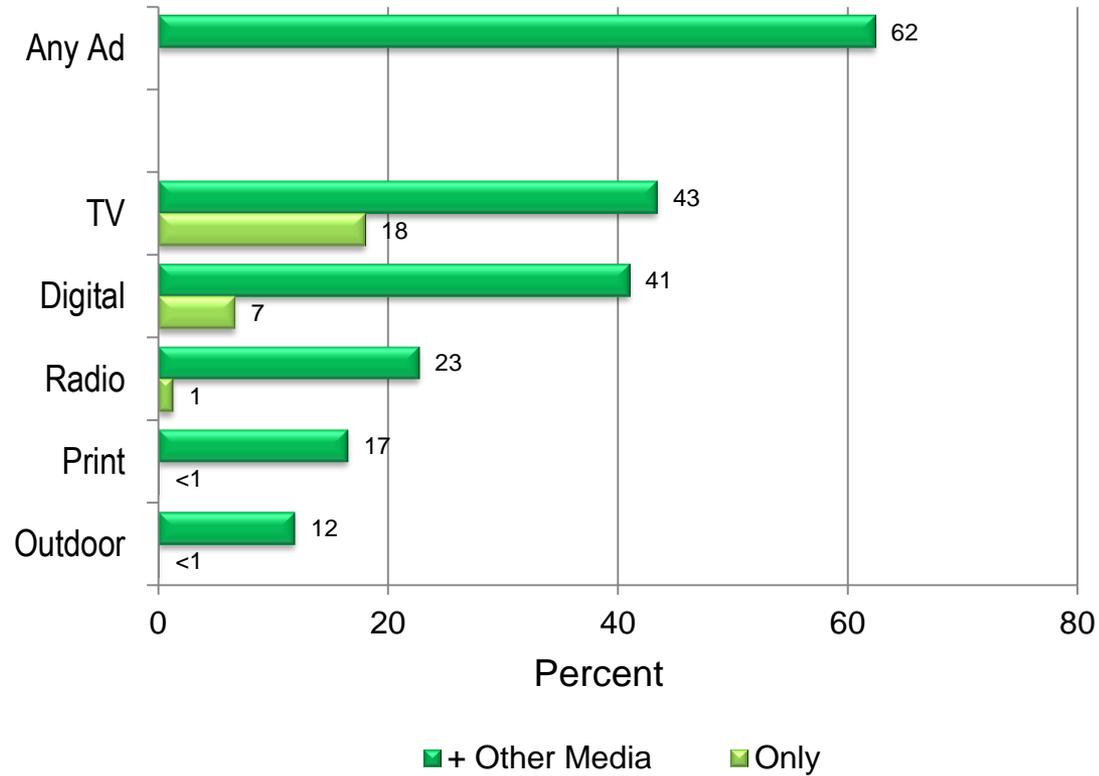
Base: Total Region



Awareness by Media



Base: Total Travelers



Bottom Line Advertising Impacts

Bottom Line Advertising Impacts



- We estimate that the investment of \$3.5 million dollars generated in the short term:
 - *1.9 million new visitors to Wisconsin who would not otherwise have come*
 - *these incremental visitors spent approximately \$275.4 million in Wisconsin*
 - *based on an analysis by Tourism Economics this spending resulted in \$21.9 million in incremental state and local taxes or a return on investment of 6:1.*
- These estimates are conservative in that they back out visits by travelers who would have come even if they hadn't seen the advertising.

Bottom Line Advertising Impacts (Continued)



- ◉ In addition to the short term impacts, we estimate that the advertising has influenced the planning of a further 1.6 million trips to Wisconsin in 2015.
- ◉ While not all of these planned trips will happen, we expect that a significant percentage will convert, adding significantly to the return on Wisconsin's investment in Tourism Marketing.

Campaign Efficiency



	2011	2012	2013	2014
Advertising Investment	\$3.5M	\$3.8M	\$4.0M	\$3.5M
Incremental Visits	2.1M	2.2M	2.1M	1.9M
Ad \$'s per Trip	\$1.68	\$1.75	\$1.88	\$1.84
Trips per Ad \$	0.60	0.57	0.53	0.54

Short-Term Impacts of The Advertising



	2014
Incremental Visits	1.9 M
Incremental Spending	\$275.4 M
Incremental State + Local Taxes*	\$21.9M

Short-Term Impacts Summary



	2011	2012	2013	2014
Ad Investment	\$3.5M	\$3.8M	\$4.0M	\$3.5M
Incremental Spending	\$256.6M	\$282.7M	\$287.9M	\$275.4M
Incremental Taxes	\$22.1M	\$23.5M	\$23.3M	\$21.9M
Spending ROI*	\$73	\$74	\$73	\$78
Tax ROI**	\$6	\$6	\$6	\$6

*Incremental visitor spending per ad \$ invested.

** Incremental taxes per ad \$ invested.

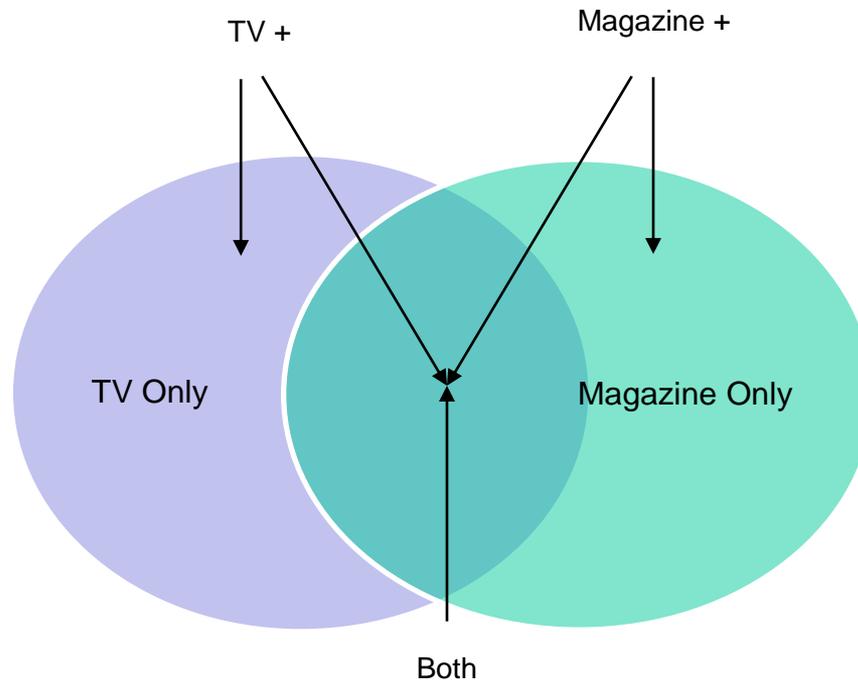
Longer-Term Impact of Advertising – Intent to Visit Wisconsin



Intend to Visit Wisconsin in Next 12 Months	
Definitely	862,000
Probably	800,000
Total Intenders	1,662,000

Wisconsin Media Diagnostics

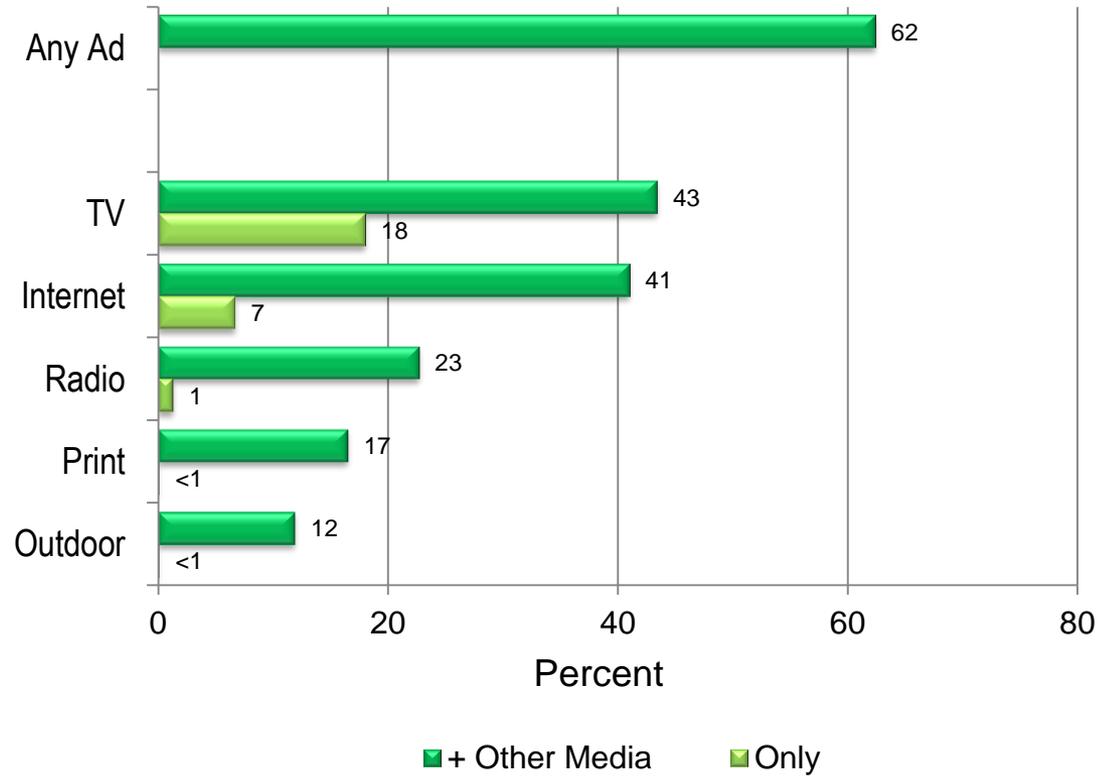
Definition of Awareness



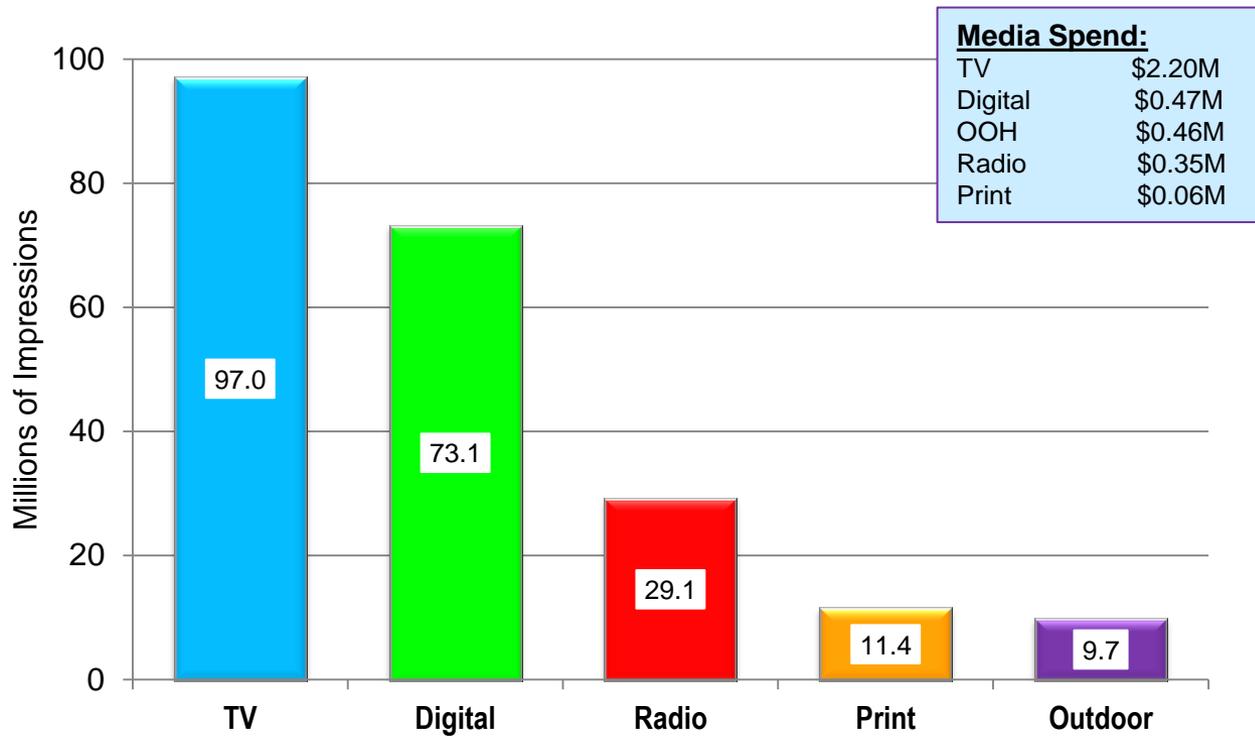
Awareness by Media



Base: Total Travelers



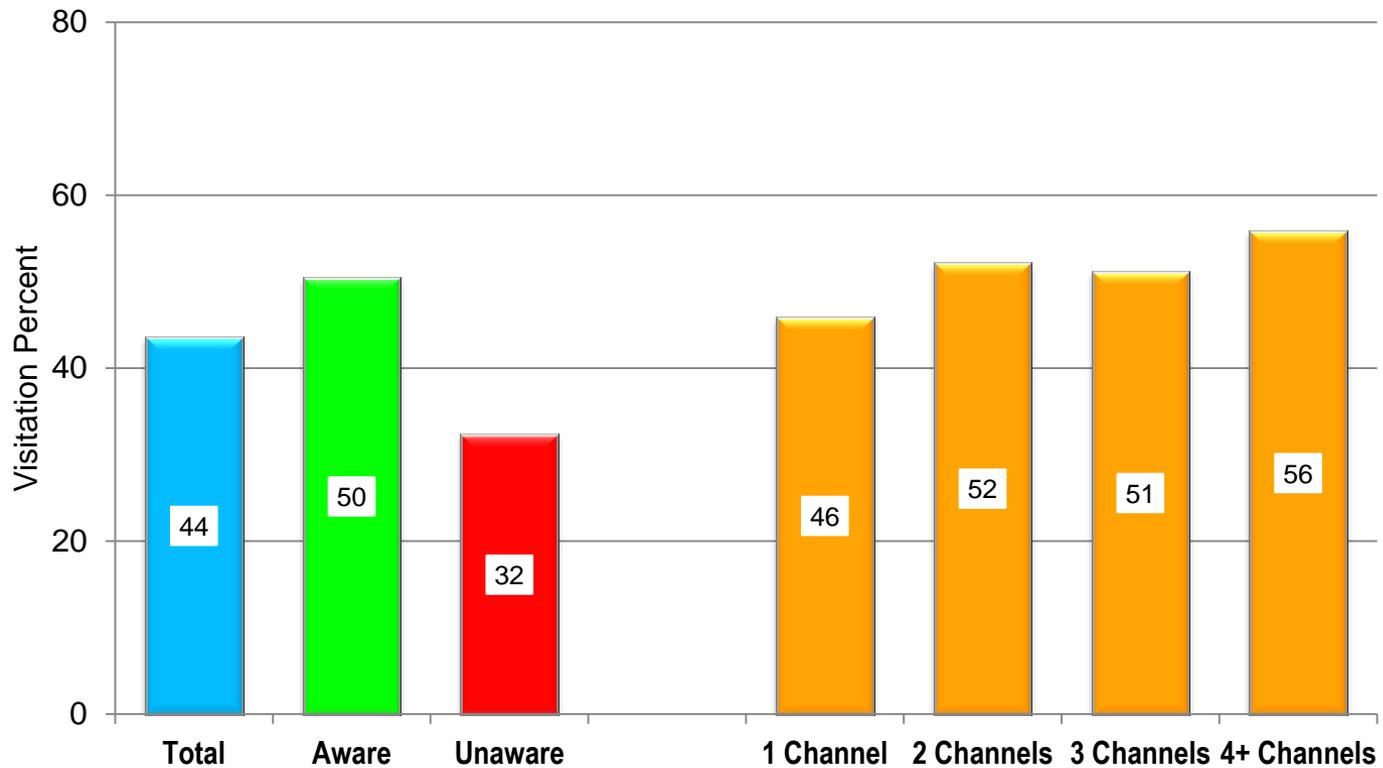
Total Impressions by Media



Impact on Visitation by Number of Media Channels



Base: Total Travelers



Impact of Ad Frequency on Visits to Wisconsin

