



Strategic
Marketing &
Research, Inc.

**INDIANA OFFICE OF
TOURISM DEVELOPMENT**

Advertising Effectiveness

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BACKGROUND & OBJECTIVES

Tourism offices around the country serve as marketing organizations that promote their states as leisure destinations. The Indiana Office of Tourism Development is charged with doing so on a budget approximately one third the size of the average state tourism budget. Because of the limited resources available, the Office must be strategic in the media, markets and messages employed in each year's marketing campaign.

In order to evaluate the state's marketing, the Indiana Office of Tourism has utilized an Advertising Effectiveness survey for a number of years. By measuring the reach of a marketing campaign and determining a level of travel, an economic impact and return on investment of those limited dollars can be derived.

The specific goals of this research included the following:

- **Determine the level of advertising recall** generated by Indiana's advertising campaign among target audiences;
- **Compare Indiana's image** to that of its key competitors;
- **Compare consumers' reactions** to Indiana's ads;
- **Gauge the effectiveness of advertising** within target markets and compare the relative value of the options under consideration;
- **Evaluate the campaign's influence** on consumers' attitudes and the generation of additional travel to the state;
- **Compare results among targeted geographic regions** which were the focus of the campaign;
- **Determine visitors' activities and expenditures** during their stays in Indiana;
- **Calculate the economic benefit** of the marketing campaign; and
- **Provide specific conclusions and recommendations** relative to the effectiveness of marketing Indiana as a tourism destination.

METHODOLOGY

This research has been designed to measure the effectiveness of the organization’s marketing campaign that targets leisure travel. Effectiveness will be measured by reach of the campaign in target markets, the cost to reach an aware household in those markets, the impact of the advertising on the image of the state, incremental travel generated in each market, economic impact and, finally, return on investment.

SMARI has devised a research methodology relative to the ways in which people make travel decisions. The decision process comprises several steps and each step can be influenced by effective marketing. This research measures the impact of the state’s promotional endeavors at each step. The text below outlines each step of the process (on the left) and the “measure” used to evaluate the effectiveness of the state’s marketing efforts.

<u>Influence Process</u>		<u>Measure</u>
Exposure	→	Advertising Awareness
Messaging	→	Creative Evaluation
Shift in Attitudes	→	Comparative Image Assessments
Build Interest	→	Comparative Interest in Visitation
Generate Travel	→	Incremental Travel

This research was conducted in October 2007 upon conclusion of the summer media campaign and once potential visitors had an opportunity to travel. To accurately measure awareness of the marketing, an online survey instrument that allowed consumers to view the actual ads was employed. Sample was purchased from a national vendor, Survey Sample International, in seven Indiana Office of Tourism Development target markets. Respondents were screened as leisure travelers responsible for travel decision making. In total, 1,226 surveys were completed in distribution to the right.

Indiana	226
Indianapolis	210
Cincinnati	195
Champaign	116
Chicago	177
Grand Rapids	127
Louisville	175
Total	1,226

Upon completion of the data collection process, an SPSS dataset was compiled for analysis. The survey results were weighted to be representative of the market group populations. The following summarizes the key findings.

CAMPAIGN OVERVIEW

The Indiana Office of Tourism Development implemented dramatic changes in its marketing program in 2006 with the roll out of the Restart Your Engines rebranding effort. With the new brand came new creative designed to improve the image of the state as a leisure destination. While radio and TV were used in prior years, the 2007 campaign also included an expanded print component and a new online presence. Not only was an additional medium employed, but the budget for all other mediums increased by approximately one-third, resulting in an overall budget increase for 2007 of 37%.

Campaign Costs by Medium

	2006	2007	% Change
Television	\$259,356	\$351,155	35%
Radio	\$144,016	\$192,322	34%
Print	\$276,570	\$372,377	35%
Online	--	\$15,699	100%
Total	\$679,941	\$931,553	37%

Given its limited resources, IOTD has always focused its leisure advertising efforts toward Midwestern cities. And though the target markets have changed slightly through the years, the same markets used in 2006 were again a target and the Louisville market was added. Given that print and online are not specific to a target market, only the cost of TV and radio are considered dedicated to a particular community.

While spending in a number of markets remained relatively unchanged, spending in those areas in Indiana not in Indianapolis increased 25%. The biggest increase was in the Chicago market where spending more than doubled from 2006. Again, the spending in target markets increased over one third.

	2006	2007	% Change
Indiana	\$109,026	\$136,077	25%
Indianapolis	\$92,880	\$93,747	1%
Cincinnati	\$79,459	\$88,347	11%
Champaign	\$24,096	\$25,972	8%
Chicago	\$37,995	\$84,663	123%
Grand Rapids	\$59,917	\$64,670	8%
Louisville	--	\$50,001	100%
TOTAL	\$403,372	\$545,484	35%

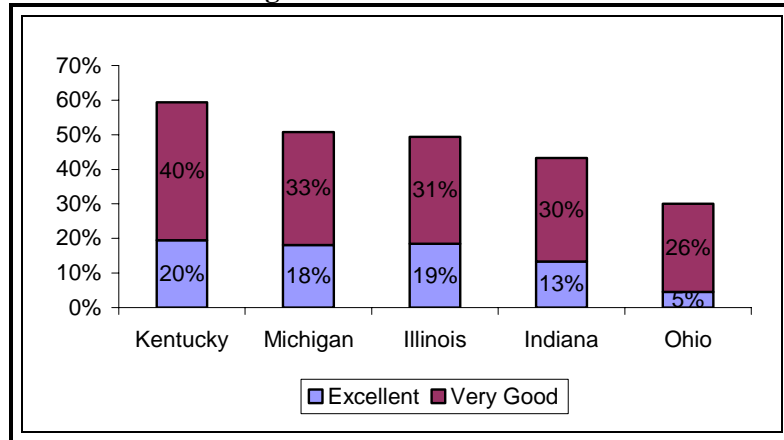
COMPETITIVE SITUATION

Before reviewing the impact of the advertising, we review the competitive landscape. Travel decisions are made in a competitive context, in that consumers generally do not decide to visit or not visit Indiana. Instead, they make the decision to visit Indiana or another, similar competitor.

One of the things that make marketing the state so challenging is that Indiana is at a disadvantage when consumers evaluate Midwestern states as a leisure travel destination. While Kentucky is viewed most favorably, Indiana falls short of most of the competitive set, which the state has known for many years. The only state to lag Indiana as a favorable place to visit is Ohio.

States are some of the best well-branded products, in that all consumers, even if they've never been there, have perceptions of a place based on their interactions through the media or word of mouth. For that reason, it is quite difficult to change the image of a destination and, as seen below, there is little variation from year to year. However, all the attributes for the image of Indiana improved for 2007. On a 5-point scale, the goal is a rating above 3.5. And though there was only one attribute that met this threshold in 2006, many surpassed that mark in 2007.

Image as a Travel Destination



Change in Image

	2006	2007	Diff.
Is entertaining	3.2	3.5	0.3
Is action-packed	2.9	3.1	0.3
Has arts and culture	3.3	3.5	0.2
Is fun	3.3	3.5	0.2
Is welcoming	3.5	3.8	0.2
Is lively	3.0	3.2	0.2
Is adventurous	3.0	3.2	0.2
Is rejuvenating	3.1	3.3	0.2
Is exciting	3.0	3.2	0.2
Is modern	3.1	3.3	0.2
Is unique	3.1	3.3	0.2
Is engaging	3.1	3.3	0.2
Is simplistic	3.5	3.6	0.2
Is charming	3.3	3.5	0.2
Is refreshing	3.2	3.4	0.2
Full of places to discover	3.4	3.6	0.1
Is beautiful	3.5	3.6	0.1
Is relaxing	3.5	3.6	0.1
Is peaceful	3.6	3.7	0.1

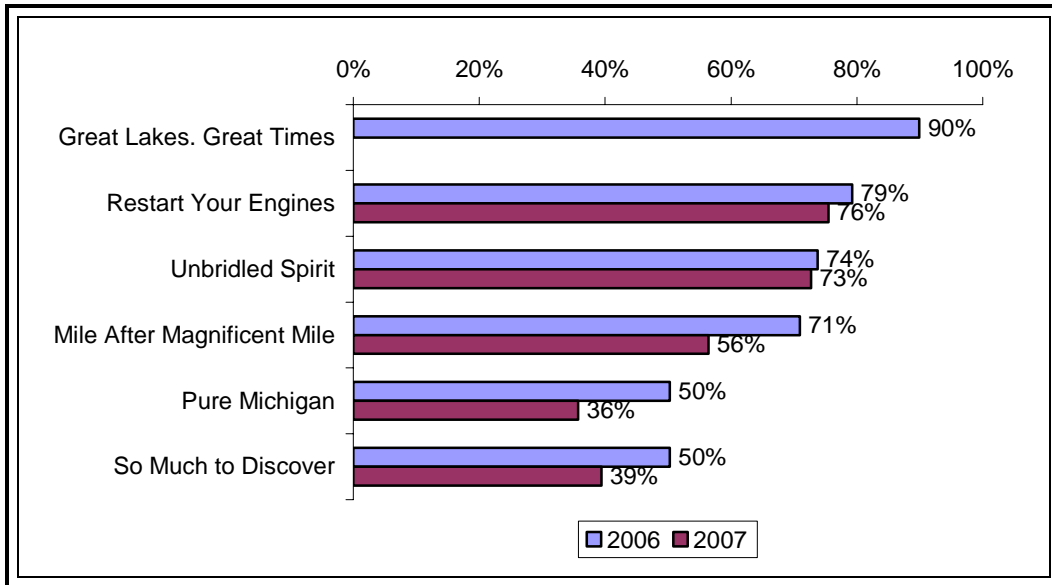
Because states are some of the most well branded products, the competitive situation has changed little. An index, makes it easier to evaluate Indiana’s image as it relates to competitors. Here, a rating of 100 means that the state’s rating is average; a score of 105 is 5% above average; and a rating of 95 is 5% below average. The attributes for which Indiana was rated highest in 2006 – simplistic and peaceful – were again the state’s top attributes. However, *welcoming* had in index of 99 in 2006, but rose to 102 this year.

Comparative Image Ratings

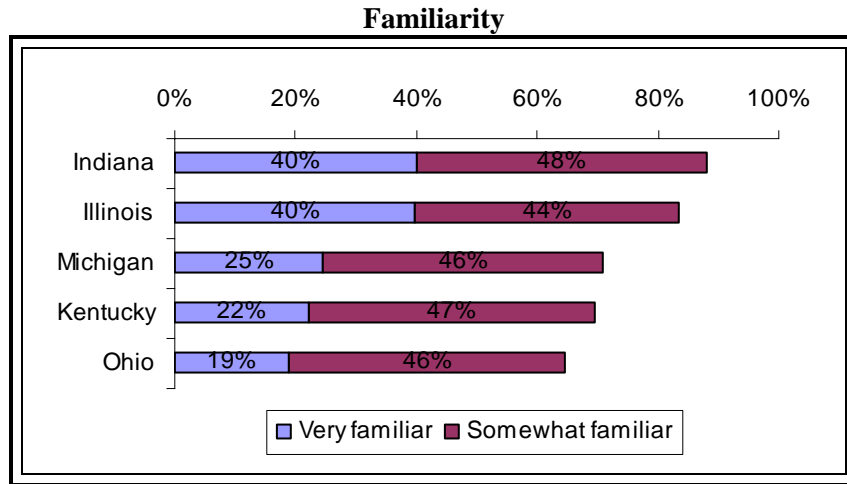
	Indiana	Illinois	Kentucky	Michigan	Ohio
Is simplistic	106	92	110	103	89
Is peaceful	102	90	109	107	91
Is welcoming	102	98	105	102	93
Is relaxing	101	93	109	106	92
Is charming	100	96	110	104	90
Is refreshing	97	98	108	107	90
Has arts and culture	97	113	98	97	95
Is beautiful	97	95	111	108	89
Is rejuvenating	96	99	106	107	92
Is fun	95	104	104	103	94
Is entertaining	95	109	103	99	94
Is engaging	95	106	104	104	92
Is modern	94	113	96	102	95
full of places to discover	94	103	104	105	93
Is unique	93	104	108	106	89
Is lively	93	111	102	100	93
Is adventurous	93	104	107	105	92
Is exciting	93	108	103	103	93
Is action-packed	92	111	101	102	94

When Indiana changed its slogan to Restart Your Engines in 2006, it was important to IOTD that the slogan be identified with Indiana. While Great Lakes, Great Times was the most recognized slogan in 2006, because Michigan dropped it in favor of Pure Michigan, Restart Your Engines was the most correlated slogan of any competitor state in 2007.

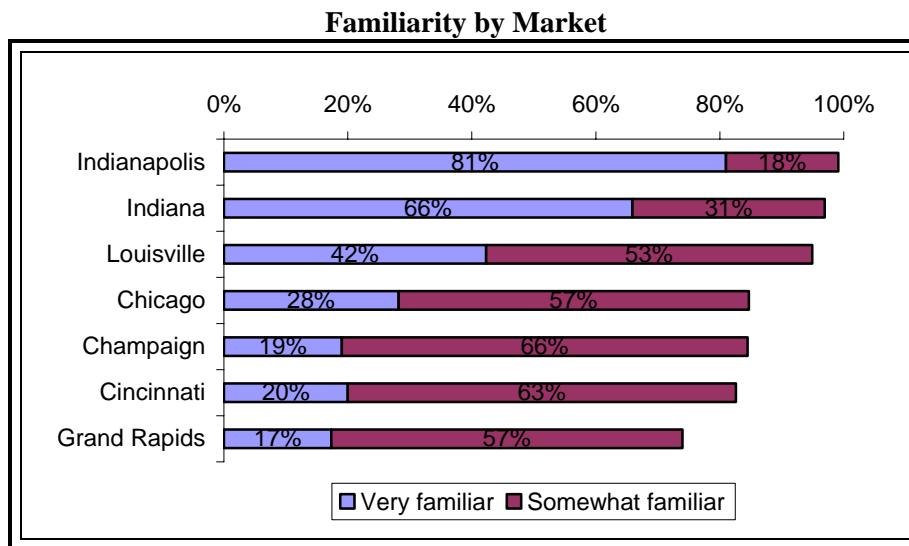
Brand Awareness



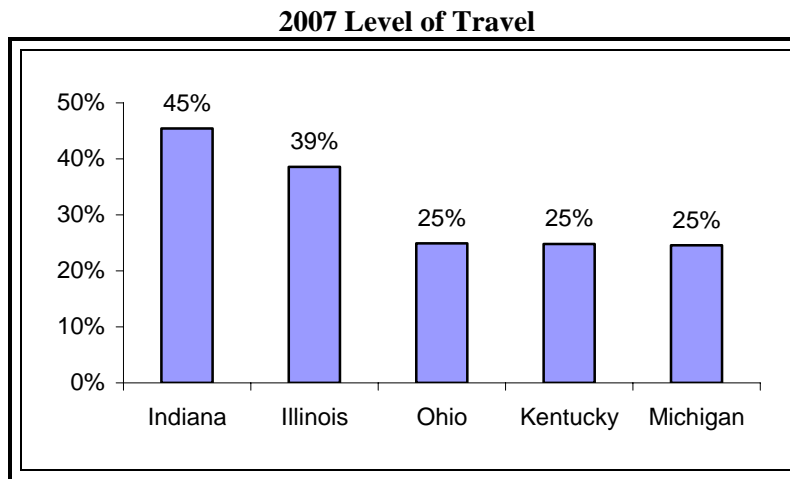
Though consumers in Indiana's target markets do not have the most favorable image of the state, they are more familiar with Indiana as a leisure destination than any other Midwestern competitor.



However, it should be noted that the sample is weighted to be reflective of the population of each of the target markets. Because Chicago is considerably larger than the other markets, that market is driving familiarity. When looking at the target markets and how familiar they are with the state, it is of course in-state residents with the most familiarity.



Familiarity is often an indicator of past visitation as consumers are likely familiar with places they have already been. Because Indiana had the most familiarity of any state within all of the target markets, it is not surprising that such a high percentage visited the state within the past year. It must be noted that though Indiana received 20% more visitation than some of its competitors, this is only the level of travel for *Indiana's* target markets, which are likely different than the target markets of those states. This highlights that while image is important, convenience drives many travel decisions. So even with a weak image, Indiana can compete, especially with an effective advertising effort.



Again, just as familiarity varied by target market, so did the rate of travel. Though 68% of Indiana residents outside of Indianapolis took a leisure trip in the state, only 34% of the Chicago and Cincinnati markets did the same. However, when these rates of travel are applied to the total number of traveling households, the result is over 2.6 million trips to Indiana from the seven target markets.

Total 2007 Travel from Target Markets

	2007 Travel	Traveling Households	Trips to Indiana
Indiana	68%	839,580	568,388
Indianapolis	62%	812,323	506,735
Louisville	59%	529,459	314,650
Champaign	42%	233,744	98,737
Grand Rapids	35%	486,754	172,472
Chicago	34%	2,328,087	789,182
Cincinnati	34%	635,402	215,059
Overall	45%	5,865,350	2,665,223

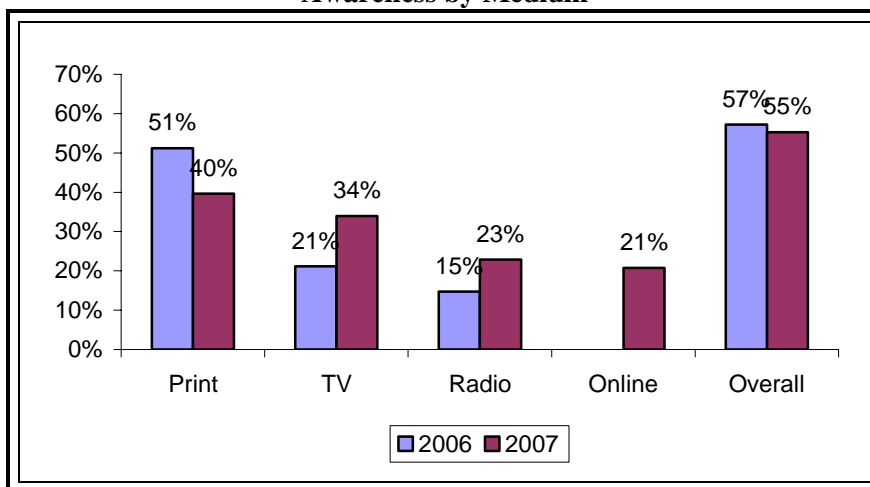
However, it is not these levels of visitation that will be used to calculate the effectiveness of the marketing program. Only incremental visitation, or those who visited the state as a direct result of the advertising, will be considered. The first step in determining incremental visitation is establishing awareness in the target markets.

AWARENESS

As described in the Methodology section of this report, measuring the impact and return on investment of a marketing campaign is a multi-step process, the first of which requires measuring the recall of the campaign. This is because in order for travel to be influenced, consumers must first be aware of some form of the marketing.

Though an additional medium – online – was added in 2007, overall awareness actually declined. Given there was an increase in both TV and radio awareness in addition to the new online medium, the decline is attributable to the decrease in print awareness. While 35% of consumers in the target markets were aware of the Free Standing Insert or co-op ads in 2006, that declined to 27% in 2007, considerably contributing to the overall decline in print awareness.

Awareness by Medium

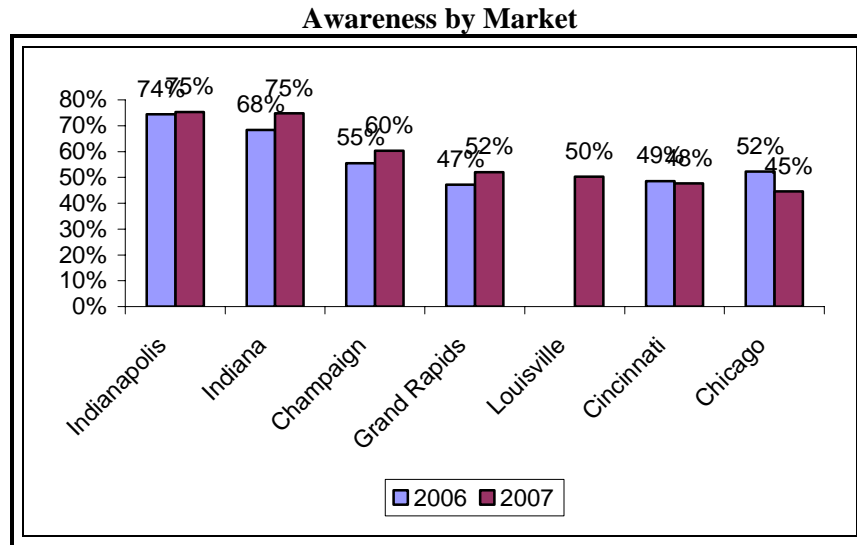


Combining a slight decline in awareness with an increase in the advertising budget by over one third, results in a higher cost to reach an aware household. Overall, it cost the Indiana Office of Tourism Development \$0.29 to reach a household, compared to \$0.20 in 2006. However, SMARI has developed national benchmarks, and the average cost to reach an aware household is \$0.92. Though the 2007 campaign was slightly less efficient, it is still generating tremendous awareness for the investment.

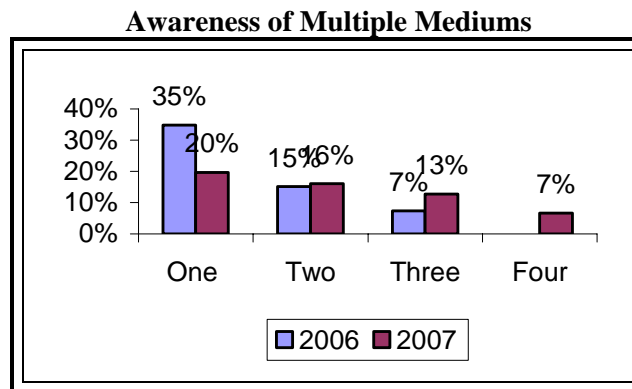
Cost per Aware Household

	2006	2007
Print	\$0.09	\$0.16
TV	\$0.21	\$0.18
Radio	\$0.17	\$0.14
Online	--	\$0.01
Overall	\$0.20	\$0.29

While the average awareness level for all seven markets was 55%, the levels varied by market. Those for which Indiana spent marketing dollars in 2007 – Indianapolis and other Indiana markets - earned the highest recall. While most markets’ awareness levels remained level or slightly increased, Chicago declined from 52% in 2006 to 45% in 2007. Again, SMARI has developed national standards for anticipated awareness based on the size of the target market and the spending by a destination. Though spending in Chicago increased significantly in 2007, the 45% awareness level is what SMARI’s benchmark estimates should be generated based on current budgets.



Because oftentimes it is not just awareness but repeated awareness that can impact if consumers take action, in this case, travel, it is important to have a media campaign where consumers are aware of multiple mediums. Because IOTD extensively expanded its print campaign and added the online medium, there were more opportunities for consumers to be exposed to multiple mediums. While overall awareness was slightly lower, more consumers were aware of more than one medium in 2007 as compared to 2006.



Though Chicago had the lowest level of awareness, the size of the market results in it also having the lowest cost to reach an aware household. Cincinnati, the market with the highest spending behind Indianapolis and Indiana, was the most expensive to reach an aware household. But again, all of these are well below the national benchmark of \$0.92.

Cost per Aware Household

	Awareness	Cost per Aware Household
Indianapolis	75%	\$0.15
Indiana	75%	\$0.22
Champaign	60%	\$0.18
Grand Rapids	52%	\$0.26
Louisville	50%	\$0.19
Cincinnati	48%	\$0.29
Chicago	45%	\$0.08

CREATIVE EVALUATION

While awareness is the first step toward impacting visitation, simply making consumers aware is not enough. The message of the ads must be both compelling and motivating. For this reason, the research also allows for evaluation of the creative.

Given that the 2007 Indiana campaign expanded on creative elements implemented in 2006, the goals of the campaign did not change. It was designed to position the state in a dual role -- as a place to rejuvenate and recharge but also as a place with adventure and excitement. To evaluate the campaigns, the respondents viewed the ads and were then asked to indicate how well the campaign communicated a set of messages. Two types of attributes were used in the rating process: 1) attributes focused on key messages to determine the effectiveness of the communications effort, 2) attributes focused on the impact of the message in terms of generating greater interest in the state. Ratings were based on a 5-point scale. SMARI has tested hundreds of destination ads and has found that with this scale, a rating of 4.0 or higher indicates excellence. The goal is a rating of 3.75 or better, although a score of 3.5 or higher is good. Any score lower than 3.0 indicates a problem area.

While high ratings for *communication* are important, *impact* ratings are those which can actually affect visitation to a destination. These attributes determine the influence of the advertising and its ability to generate visitation. Because *impact* ratings require action by consumers, quite a difficult objective, these ratings are traditionally lower than the *communication* ratings.

The Restart Your Engines campaign is performing quite well, especially in the creative's ability to make the state appear beautiful and highlight unexpected, unique attractions. Even the impact ratings, which again are difficult to score as high on as communication ratings, are quite good. Most notably, the ads are performing well in their ability to pique interest in traveling to Indiana.

Communication Ratings	Rating
Makes the state seem fun and exciting.	3.63
Makes it appear scenic and beautiful.	4.00
Shows something unique and remarkable about the state.	3.73
Portrays it as a place full of unexpected discoveries.	3.75
Impact Ratings	
Makes you more interested in traveling within the state.	3.63
Left you wondering about the location and wanting more information.	3.58
Makes you interested in visiting the state's website.	3.59

This is the second year the Restart Your Engines campaign has been employed. By evaluating consumers who were aware of the current campaign and their image of the state and those consumers who were aware of the prior campaign, Enjoy Indiana, we can see how the current campaign is changing the image of the state, especially on those attributes which are important in motivating travel.

The Restart Your Engines campaign has improved the image of Indiana on every attribute, but especially in showing a place that's *fun*, *entertaining* and *adventurous*. These differences are important because high ratings on these image attributes are an indicator of consumers' likelihood to travel. By using the statistical process of correlation, ratings of image attributes can be associated with likelihood to travel to a state. Through this process, the two most important travel motivators are deduced – *fun* and *full of places to discover*. Future creative executions should continue to highlight these two attributes as the state's campaign is already scoring well on other travel motivators – *relaxing*, *welcoming* and *beautiful*.

Impact of Restart Your Engines on Image

	Enjoy Indiana	Restart Your Engines	Difference	Travel Motivation
Entertaining	3.03	3.53	0.50	30%
Fun	3.08	3.55	0.47	34%
Adventurous	2.80	3.26	0.46	28%
Has arts & culture	3.11	3.54	0.43	31%
Welcoming	3.39	3.82	0.43	32%
Refreshing	3.04	3.46	0.42	32%
Action-packed	2.78	3.18	0.40	24%
Rejuvenating	2.91	3.30	0.39	30%
Exciting	2.81	3.20	0.39	28%
Lively	2.88	3.27	0.39	26%
Full of places to discover	3.21	3.59	0.38	34%
Unique	2.89	3.27	0.38	28%
Engaging	2.96	3.33	0.37	30%
Beautiful	3.29	3.63	0.34	32%
Peaceful	3.38	3.72	0.34	29%
Charming	3.21	3.55	0.34	31%
Relaxing	3.44	3.69	0.25	33%
Modern	3.01	3.25	0.24	26%
Simplistic	3.52	3.70	0.18	28%

IMPACT OF THE ADS

While an advertising campaign can increase awareness by shifting markets, adding media and investing more dollars and good creative can effectively convey communication messages, the goal is to impact consumers in some way. Of course, the end goal is to turn a household into a visitor, but another measure of success is whether the campaign impacts the image of a destination. As discussed, states are some of the best well-branded products and changing imagery is difficult. However, awareness of a marketing campaign can affect consumers' perceptions of a destination.

While the previous image evaluation compared the impact of two different campaigns on the state's image, there are also differences between those who were aware of the Restart Your Engines campaign and those who were unaware. The 2007 campaign had a positive impact on all attributes but the greatest differences between aware and unaware consumers were their perceptions of Indiana as *welcoming*, *entertaining* and *fun* – again, attributes that are important in motivating travel.

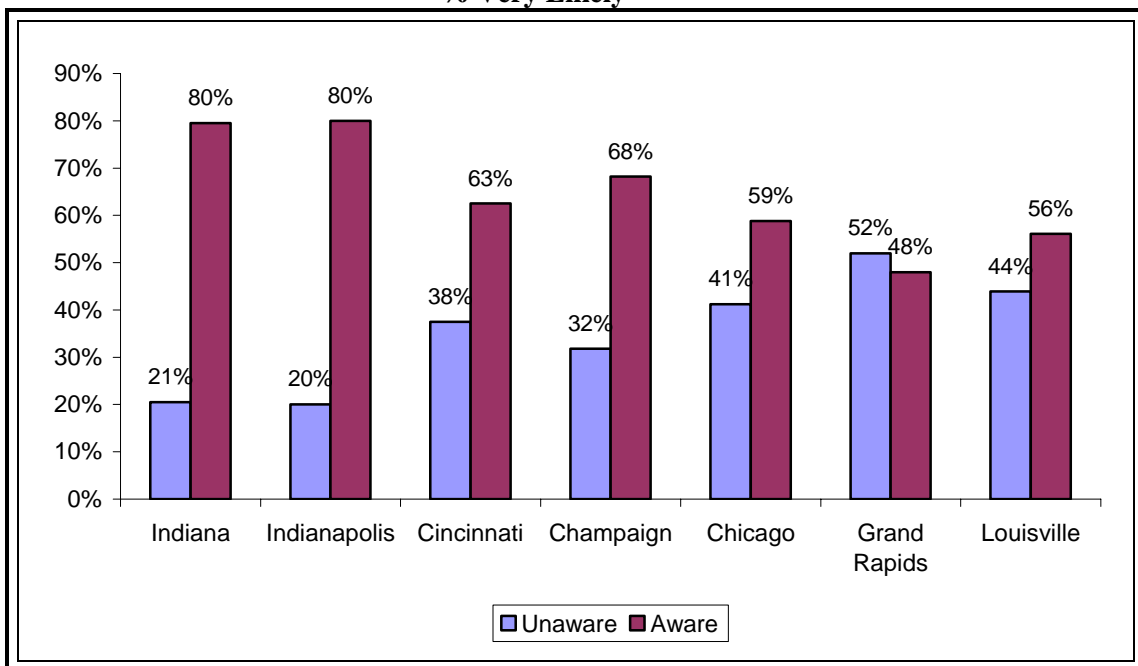
	Unaware	Aware	Difference
Is welcoming	3.5	3.8	0.4
Is entertaining	3.2	3.5	0.4
Is fun	3.2	3.5	0.3
Is beautiful	3.3	3.6	0.3
Is lively	3.0	3.3	0.3
Has arts and culture	3.3	3.5	0.3
Is relaxing	3.4	3.7	0.3
Is refreshing	3.2	3.5	0.3
Is action-packed	2.9	3.2	0.3
Is engaging	3.1	3.3	0.3
Is full of places to discover	3.3	3.6	0.3
Is charming	3.3	3.5	0.3
Is simplicity	3.4	3.7	0.3
Is rejuvenating	3.0	3.3	0.3
Is peaceful	3.5	3.7	0.2
Is adventurous	3.0	3.3	0.2
Is exciting	3.0	3.2	0.2
Is unique	3.1	3.3	0.2
Is modern	3.1	3.3	0.2

While it is important that ads impact the image of a destination, the next step is to motivate a consumer into action, either first by responding to the advertising in some way or, ultimately, visiting. Consumers were asked if they had contacted Indiana for information in any way, including visiting the state's website. Because the Internet has become such a force in travel planning and most consumers consider the Web their primary source of information, it is not surprising that consumers visited the state's Website more often than any other source. There was a marked increase in contact with Indiana Office of Tourism Development and partner destinations by ad aware consumers.

	Unaware	Aware
Visited State Website	12%	30%
Called State 800 number	0%	3%
Requested information about a city or attraction	9%	16%
Requested information in another way	7%	12%
Gathered information in some way	26%	47%

While actual visitation by those who were aware of the 2007 campaign will be the final measure in the impact, advertising can motivate future travel as well. For most target markets, those who were aware of the Indiana campaign were considerably more likely to intend to travel to the state in the next year than those who were unaware of the ads. The exception, however, is in Grand Rapids which has the highest percentage of unaware consumers intending to visit the state.

Likelihood to travel to Indiana
% Very Likely



Though impacting future travel is a positive effect of a current year's advertising campaign, this research is designed to measure the impact of the campaign on generating travel and spending in 2007. As outlined in the Methodology section of this report, SMARI takes a conservative approach to calculating economic impact. Because consumers would travel to the state without any advertising, the impact of the advertising is the difference in the rate of travel between aware and unaware consumers. The *incremental travel* is the travel that is directly attributable to the state's media spending.

In 2007, the Indiana Office of Tourism Development's campaign had the most impact in the Indianapolis market, followed by Chicago. However, because more unaware than aware consumers visited the state from Grand Rapids, that market has no incremental travel.

Incremental Travel by Market

	Indiana	Indianapolis	Cincinnati	Champaign	Chicago	Grand Rapids	Louisville
Unaware	53%	40%	25%	35%	21%	36%	51%
Aware	73%	70%	43%	47%	49%	35%	68%
Incremental Travel	20%	29%	18%	12%	28%	0%	18%

As stated earlier, exposure to multiple mediums often impacts a consumer's action. And while those who saw one or two ads had relatively the same rate of travel, when exposed to three or four mediums, the advertising certainly had more impact. It was shown that 20% of all traveling households in IOTD's target markets saw at least three ads. This is a significant percentage but should continue to be a focus of media buying as multiple exposure is clearly a motivator to travel.

Impact of Multiple Ads

# of Ads	Rate of Travel
One	55%
Two	54%
Three	60%
Four	70%

Not only can a campaign impact the rate of travel, it can also impact the types of trips consumers take, the length of the trip and ultimately, the spending. Those who were aware of Indiana's advertising more often used paid accommodations than those who did not see the campaign; they also took longer trips and did more, resulting in higher trip spending by aware consumers. And while trip spending was higher for aware consumers, it is considerably lower than spending by aware consumers in 2006, which was \$612. SMARI is seeing some indicators that this may be a trend due to the current economic environment, which is not something the Indiana Office of Tourism Development can control or influence.

Advertising Impact on Trip Specifics

	Unaware	Aware
Use paid accommodations	33%	40%
Nights on trip	2.1	2.6
Number of Activities	4.5	6.3
Trip Spending	\$344	\$537

TRIP SPECIFICS

As explained, the economic impact of the campaign is based only on the incremental travel generated by the advertising – that is, only those trips which would not have occurred without the advertising. As such, not all visitation is included in the calculation. Several other factors can influence the economic impact of a campaign, including travel party composition, number of nights stayed, type of accommodations used, number of attractions visited and, ultimately, visitor spending. By comparing the types of trips travelers to Indiana are taking to that of the competitive set, the state can get a sense of where it stands in the marketplace.

Though Indiana receives more day trips than other Midwestern state, those that do stay overnight, stay approximately the same length of time. And though the travel party size is similar, Indiana trips are more likely to include children. However, the figure that has the most impact on a state's economy – trip spending – is higher for Indiana trips than other Midwestern travel.

	Other Midwest Trips	Indiana Trips
Use paid accommodations	42%	38%
Nights on trip	2.5	2.5
Number of Activities	5.7	5.8
Travel Party Size	2.7	2.8
% Traveling with Children	32%	37%
Trip Spending	\$462	\$479

One possible explanation for the increased trip spending, though fewer consumers in the target markets are staying overnight, is the presence of gambling. While other Midwestern states have tribal gambling or are considering implementing gaming, Indiana remains one of the only Midwestern states with state sanctioned casinos. Additionally, the higher level of children on trips tends to result in attendance at more children-focused attractions. Those activities in which consumers are participating more often in other states – enjoying scenic beauty and visiting friends and relatives – are not activities with an impact on trip spending.

Trip Activities

	Other Midwest Trips	Indiana Trips	Difference
Gamble at a riverboat casino	9%	19%	10%
Visit zoos or children-oriented museums	17%	24%	6%
Attend fairs or festivals	22%	25%	3%
Visit larger more metropolitan cities	14%	18%	3%
Attend sporting events	9%	12%	3%
Go shopping	44%	46%	2%
Outdoor activities	18%	20%	2%
Visit nightclubs or bars	13%	15%	2%
Go hiking or biking	14%	16%	2%
Go antique shopping	12%	13%	2%
Go camping	11%	13%	2%
Attend musical performances	8%	9%	1%
Go to a music concert	11%	12%	1%
Take scenic drives or driving tours	34%	35%	1%
Visit art or cultural museums	13%	13%	0%
Visit amusement or theme parks	15%	14%	-1%
Look for distinctive architecture	12%	11%	-1%
Visit state or national parks	21%	20%	-2%
Visit small or quaint towns	37%	34%	-3%
Visit historic sites	32%	29%	-3%
Eat at restaurants unique to the area	50%	47%	-3%
Go to lakes, rivers, or other natural features	44%	40%	-4%
Visit with friends or relatives	47%	41%	-7%
Enjoy scenic beauty	60%	52%	-7%

ECONOMIC IMPACT & ROI

The final step in the evaluation process is calculating the economic impact and ROI generated by the advertising. Again, SMARI's approach to calculating economic impact is quite conservative. It takes into account only those trips which *would not have occurred without the advertising*.

Because consumers would visit Indiana even without any advertising, not all travel can be attributed to a marketing campaign. To determine the level of travel that is a direct result of the advertising, the rate of travel by aware households is subtracted from the rate of travel by unaware households. This incremental travel is how the economic impact of a campaign is determined. For 2007, incremental travel increased to 22%. So though awareness decreased slightly, the increase in incremental travel resulted in an economic impact of over \$382.7 million.

As discussed earlier, there was a significant decline in trip spending by aware households, likely due to current economic conditions. Because there were over 100,000 more incremental trips, had spending remained near previous levels, the economic impact would have been considerably higher.

Though economic impact was higher, with a budget increase of 37%, there was a decline in ROI. However, at \$411 returned for every \$1 invested in marketing, this is still quite remarkable. Other states with regional campaigns often see a ROI of under \$100.

Economic Impact

	2004	2005	2006	2007
Aware households	2,882,347	3,677,817	3,340,650	3,241,385
Incremental travel	14%	10%	18%	22%
Incremental trips	397,764	378,815	601,735	712,897
Spending per Trip	\$575	\$645	\$612	\$537
Economic Impact	\$228.7 million	\$278.9 million	\$368.5 million	\$382.7 million
Tax Generated	\$13.7 million	\$16.7 million	\$22.1 million	\$23.0 million
Ad spending	\$810,310	\$677,973	\$679,941	\$931,553
ROI	\$282	\$411	\$542	\$411
Tax ROI	\$17	\$25	\$33	\$25

There are additional marketing activities not reflected in the paid advertising budget, including public relations and direct e-mail marketing. When these activities are included, 57% of the target markets had some level of awareness of Indiana's efforts. These ancillary activities generated an additional \$52.5 million for Indiana's economy.

Impact of Additional Marketing

	2004	2005	2006	2007
Aware households	4,530,421	4,863,561	3,560,982	3,371,291
Incremental travel	20%	16%	24%	24%
Incremental trips	910615	778170	848,431	818,814
Spending per Trip	\$550	\$654	\$599	\$531
Economic Impact	\$500.8 million	\$581.0 million	\$507.9 million	\$435.2 million
Tax Generated	\$30.0 million	\$34.9 million	\$30.5 million	\$26.1 million
Ad spending	\$810,310	\$677,973	\$679,941	\$931,553
ROI	\$618	\$857	\$747	\$467
Tax ROI	\$37	\$51	\$45	\$28

The 2007 campaign performed well in generating awareness, creating a positive impact on the image of the state and in encouraging travel overall. However, there are differences among the performance of the target markets. As discussed, because Grand Rapids had a high rate of travel among unaware households, there was no incremental travel – and therefore no economic impact – in that market.

Because of the size of the market, though it had the lowest awareness, Chicago generates the most economic impact and the highest return on investment, followed by Indianapolis. Again, though Cincinnati and Champaign have a lower ROI, it is still significant and a good return for the dollars spent.

Economic Impact by Market

	Indiana	Indianapolis	Cincinnati	Champaign	Chicago	Louisville
Traveling HH	839,580	812,323	635,402	233,744	2,328,087	529,459
Awareness	75%	75%	48%	60%	45%	50%
Aware HH	627,827	611,176	303,038	141,053	1,039,090	266,242
Incremental Travel	20%	29%	18%	12%	28%	18%
Incremental Trips	126,504	178,681	53,094	17,434	290,306	46,878
Visitor Spending	\$537	\$537	\$537	\$537	\$537	\$537
Economic Impact	\$67.9 million	\$95.9 million	\$28.5 million	\$9.4 million	\$155.8 million	\$25.2 million
Media Spending	\$136,077	\$93,747	\$88,347	\$25,972	\$84,663	\$50,001
ROI	\$499	\$1,023	\$323	\$360	\$1,841	\$503

CONCLUSIONS & RECOMMENDATIONS

The advertising budget increased considerably from 2006 – up 37%, with most of the additional spending being in the Chicago market and the inclusion of Louisville. Though spending in Chicago increased, awareness actually decreased. This is unusual as increased spending traditionally leads to increased awareness. However, SMARI has developed benchmarks to determine the level of awareness destinations can anticipate based on spending and population of the target market. Using this calculation, 45% awareness in Chicago is what would be anticipated. The 52% recorded in 2006 was unusually high.

Though over 2.6 million trips were taken to the state by households in the seven target markets, nearly 713,000 of those are a result of Indiana's paid marketing efforts. Over 100,000 additional trips are attributable to public relations and direct marketing.

The economic impact of the Indiana Office of Tourism's paid advertising is up over \$14.2 million in the state's target markets. However, increased spending actually reduced the return on investment, resulting in an ROI of \$411 for every \$1 the state spends in advertising. And though it declined, the ROI remains one of the highest for any state tourism organization with which SMARI works. Other states with regional marketing efforts regularly see an ROI of well under \$100.

Overall awareness decreased slightly with the drop attributable to fewer consumers aware of print elements of the campaign. For its first year in use, 21% awareness of the online advertising is quite impressive. Destination marketing organizations often see awareness of online ads under 15%. The cost to create an aware household rose slightly to \$0.29; this is well below the national average SMARI has found of \$0.92.

The Restart Your Engines campaign is having a positive impact on the state's image, far more than the predecessor campaign, Enjoy Indiana. Those who were aware of the current campaign rated the state far more favorable than those who were aware of the Enjoy Indiana campaign in its final year. Especially encouraging is the impact it is having on attributes considered to be travel motivators such as *fun*, *welcoming* and *refreshing*. Future creative elements of the campaign should highlight other attributes that are highly motivating – full of places to discover, beautiful and relaxing.

Because the economic impact of this report is based on the level of incremental travel – that is the difference in the rate of travel between aware and unaware consumers – it is encouraging that the overall increment increased to 22%. The campaign had the most impact in the Indianapolis market, followed by Chicago. Because a higher percentage of unaware consumers in the Grand Rapids market visited Indiana than aware, there is no incremental travel – and therefore economic impact – for that market.

Compared to other Midwestern trips, Indiana receives a higher percentage of daytrips. However, 38% of all visitors are staying overnight in paid accommodations. Indiana trips more often include children, which accounts for a higher percentage visiting zoos and children-oriented attractions. The biggest difference in Indiana trips is the number of

consumers who prefer gambling. This position unique to the marketplace should be monitored as surrounding states explore implementing state-sanctioned gaming.

As the state looks to make decisions about future media and markets, SMARI recommends continued distribution among the existing mediums with a reallocation of markets. Though Grand Rapids had the lowest ROI in 2006, it was recommended to remain in the market in order to establish the state in the consideration set. However, given the rate of travel in 2007 by unaware consumers, it certainly appears Indiana is part of that set already. And while it was Cincinnati that had the lowest ROI in 2007, the market with the lowest economic impact was Champaign. Because this market is so small, it is difficult to have a positive impact. In looking for new markets to enter, SMARI recommends the Indiana Office of Tourism Development consider St. Louis. This is a market in which the Indianapolis Convention and Visitors Association is already spending dollars, and the population of the market would likely result in more impact than spending in two smaller markets such as Grand Rapids and Champaign.

APPENDIX

Indiana Tourism
Advertising Effectiveness Survey
October, 2007

Thank you for participating in our travel survey. Your opinions are valuable to us! This survey is about travel and vacation choices. This is for research purposes only and is an opportunity for you to give feedback to travel destinations so that they can improve. No sales effort will ever result from your participation.

This survey will take approximately 15 minutes to complete. Before you begin, there are a few things to note about the survey:

1. For most questions, simply click on the button of your response and then click on the Next button to go on to the next question.
2. If you need to go back to the preceding question to change your response, click on the Previous button.
3. For some questions, you will need to scroll down to respond to all the questions on a screen.
4. You will be viewing actual print and television ads as part of this survey, and it may take a short time for the ads to load onto your computer for viewing.

To stop at any point, close the browser window. The survey will terminate and you will not be able to re-enter.

[THREE LINKS – INDIANA (in LINK) & INDIANAPOLIS (ip LINK) WILL NOT GET QS1. AND OTHER LINK WHICH WILL GET QS1.]

S1. Which of the following cities is closest to where you live?

- 1... Cincinnati
- 2... Champaign
- 3... Chicago
- 4... Grand Rapids
- 5... Louisville

S2. Who in your household is primarily responsible for making decisions concerning travel destinations?

- Me
- My spouse (TERMINATE)
- Jointly with my spouse
- Someone else (TERMINATE)

S3. Do you normally take at least one overnight, leisure trip per year that is at least 50 miles from your home?

- Yes**
- No **TERMINATE**

S4. Please take a moment to view the following television ad and answer the question.
(INSERT TEST AD AND SET UP OPTIONS FOR HIGH SPEED CONNECTION/DIAL UP CONNECTION)

- Yes
- NO →TERMINATE

Q1. Please indicate how familiar you are with each of the following states in terms of what they have to offer as a place to visit on a leisure or non-business trip.

	Not at all familiar	Somewhat familiar	Very familiar
Indiana			
Illinois			
Kentucky			
Michigan			
Ohio			

Q2. What states have you visited for a leisure trip during 2007? (Mark all that apply.)

	Visited
Indiana	
Illinois	
Kentucky	
Michigan	
Ohio	
None of the Above	

Q3. How likely are you to visit the following states for a leisure trip in the next year?

	Not at all likely	Somewhat likely	Very likely
Indiana			
Illinois			
Kentucky			
Michigan			
Ohio			

Q4. In the course of planning for any recent or upcoming trips to these areas have you gathered information, gone to the website or contacted any of the following states regarding information for planning a trip? PLEASE CHECK ALL THAT APPLY --- ALLOW MULTIPLES

	Visited State Website	Called State 800 number	Requested information about a city or attraction	Requested information in another way	Did not gather information
Indiana	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Illinois	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kentucky	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Michigan	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ohio	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Q5. Most states have advertising slogans they use to promote travel to their state. Please look at the following slogans and match them with the appropriate state.

SHOW EACH SLOGAN, WITH THE LIST OF STATES – ROTATE SLOGANS

- _____ Restart Your Engines
- _____ So Much to Discover
- Pure _____
- _____ Unbridled Spirit
- _____ Mile After Magnificent Mile

- 1.....Kentucky
- 2.....Illinois
- 3.....Indiana
- 4.....Michigan
- 5.....Ohio

ASK Q6 & Q7 FOR INDIANA AND ONE OTHER STATE CHOSEN RANDOMLY FROM THOSE WHERE FAMILIARITY AT Q1 IS THE SAME AS FOR INDIANA.

Now we'd like to get your opinion of two of the states that have been mentioned. First, we'd like you to rate [INSERT STATE].

Q6. Overall, how would you rate [NAME OF STATE] as a place to visit?

- Excellent
- Very Good
- Good
- Fair
- Poor
- Don't Know

Q7. Please consider the following statements concerning [INSERT STATE]. Indicate how much you agree with each statement by marking a number on the 5 point scale, where the more you agree with the statement, the higher the number. A rating of 5 means that you *strongly agree* with the statement, while a 1 means you *strongly disagree*. You can use any number from 1 to 5.

ASK FOR INDIANA AND ONE SAME STATE SELECTED IN Q5

MICHIGAN
KENTUCKY
OHIO
ILLINOIS

How much do you agree that [INSERT STATE]...	Strongly disagree				Strongly agree
Is welcoming	1	2	3	4	5
Is engaging	1	2	3	4	5
Is entertaining	1	2	3	4	5
Is simplicity	1	2	3	4	5
Is full of places to discover	1	2	3	4	5
Is exciting	1	2	3	4	5
Is unique	1	2	3	4	5
Is fun	1	2	3	4	5
Is lively	1	2	3	4	5
Is beautiful	1	2	3	4	5
Has arts and culture	1	2	3	4	5
Is relaxing	1	2	3	4	5
Is action-packed	1	2	3	4	5
Is adventurous	1	2	3	4	5
Is charming	1	2	3	4	5
Is modern	1	2	3	4	5
Is rejuvenating	1	2	3	4	5
Is refreshing	1	2	3	4	5
Is peaceful	1	2	3	4	5

(IF Q2_1=1 (VISTED INDIANA), ASK Q8-Q15 ABOUT TRIP TO INDIANA. IF RESPONDENT DID NOT SELECT INDIANA, RANDOMLY SELECT ANOTHER STATE SELECTED IN Q2 AND ASK ABOUT THAT **ONE** STATE)

Now, please give us some information about the leisure trip(s) you took in the past year to [INSERT STATE]. (SHOW NAME OF STATE IN COLOR)

Q8. When did you visit [INSERT STATE] in 2007 ? (Mark all that apply.)

- January February

- March April
- May June
- July August
- September October

IF MULTIPLE TRIPS, ASK ABOUT ONE THAT OCCURRED MAY OR LATER.
Thinking about the [INSERT STATE] leisure trip you took in [INSERT MONTH]...

Q9. Did you...?

- Use paid accommodations (such as hotel, motel, bed & breakfast)
- Stay with family and/or friends
- Did not stay overnight

Q10. Including yourself, how many people were on this trip?
ENTER NUMBER _____

Q11. How many were children under the age of 18 yrs old? ENTER NUMBER

Q12. Which of the following places or activities did you visit or participate in as a part of your trip? (Mark all that apply.)

- Look for distinctive architecture
- Visit historic sites
- Attend musical performances such as the symphony, opera, theater, or ballet
- Visit art or cultural museums
- Visit zoos or children-oriented museums
- Visit amusement or theme parks
- Enjoy scenic beauty
- Go to lakes, rivers, or other natural features
- Go hiking or biking
- Outdoor activities, such as fishing, hunting, canoeing, boating or sailing
- Go camping
- Go to a music concert
- Visit nightclubs or bars
- Go shopping
- Gamble at a riverboat casino
- Eat at restaurants unique to the area
- Attend fairs or festivals
- Go antique shopping
- Take scenic drives or driving tours
- Attend sporting events
- Visit larger more metropolitan cities
- Visit small or quaint towns
- Visit state or national parks

- Visit with friends or relatives
- None of the above**

Q13. To better understand the economic impact of tourism, we are interested in finding out the approximate amount of money you and other members of your travel party spent on your most recent trip while in [INSERT STATE]. Please estimate how much your travel party spent in total on...?

a. Lodging _____

b. Meals/Food/Groceries _____

c. Attractions _____

d. Recreational expenses such as boat rental, golf fees, etc. _____

e. Novelties and Souvenirs _____

f. Shopping _____

g. Entertainment such as admission fees to events or shows _____

h. Transportation such as gasoline, auto expenses, auto rental or flight costs _____

i. Other _____

[IF Q9 = 3 skip Q14]

Q14. How many *nights* did you spend in [INSERT STATE] on that leisure trip?

RECORD NUMBER _____

Q15. Overall how would you rate the experience you had in the state of [INSERT STATE]? Would you say it was...?

- Excellent
- Very Good
- Good
- Fair
- Poor

Now please take a moment to review the following tourism ads

IF LINK=IN, SHOW THE FOLLOWING:

PRINT:

PUT IN THREE GROUPS OF TWO

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\ImgAd-PatokaLake

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\Tourism_dunes

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\Tourism_jetski

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\Tourism_race

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\IN_TOUR_COOP_WEB07

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\07_FSI_FrontCover

TV:

HolidayWorldBlueSprings.mpg

mms://sms7.omniproductions.net/IN07_INTV2-1.wmv

mms://sms7.omniproductions.net/IN07_INTV2-1a.wmv

TurkeyRunDunes.mpg

mms://sms7.omniproductions.net/IN07_INTV4-1.wmv

mms://sms7.omniproductions.net/IN07_INTV4-1a.wmv

WestBadenParamount.mpg

mms://sms7.omniproductions.net/IN07_INTV6-1.wmv

mms://sms7.omniproductions.net/IN07_INTV6-1a.wmv

RADIO:

Indiana Dunes/Turkey Run

mms://sms7.omniproductions.net/IN07_INRA1.wma

Indiana Beach/Blue Spring Caverns

mms://sms7.omniproductions.net/IN07_INRA2.wma

West Baden Springs Hotel/Paramount Theatre

mms://sms7.omniproductions.net/IN07_INRA3.wma

ONLINE

I:\Team David\Ads - Master\Indiana Tourism\2007 Ad Effectiveness\Online\300x250_dunes

I:\Team David\Ads - Master\Indiana Tourism\2007 Ad Effectiveness\Online\300x250_patoka

IF LINK=IP, SHOW THE FOLLOWING:

PRINT:

PUT IN THREE GROUPS—THREE-TWO-TWO

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\ImgAd-PatokaLake

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\ImgAd-Bloomington

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\Tourism_dunes

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\Tourism_jetski

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\Tourism_race

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\IN_TOUR_COOP_WEB07

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\07_FSI_FrontCover

TV:

HolidayWorldBlueSprings.mpg

mms://sms7.omniproductions.net/IN07_INTV2-1.wmv

mms://sms7.omniproductions.net/IN07_INTV2-1a.wmv

TurkeyRunDunes.mpg

mms://sms7.omniproductions.net/IN07_INTV4-1.wmv

mms://sms7.omniproductions.net/IN07_INTV4-1a.wmv

WestBadenNotreDame.mpg

mms://sms7.omniproductions.net/IN07_INTV5-1.wmv

mms://sms7.omniproductions.net/IN07_INTV5-1a.wmv

RADIO:

mms://sms7.omniproductions.net/IN07_INRA1.wma

Indiana Beach/Blue Spring Caverns

mms://sms7.omniproductions.net/IN07_INRA2.wma

West Baden Springs Hotel/Paramount Theatre

mms://sms7.omniproductions.net/IN07_INRA3.wma

ONLINE

I:\Team David\Ads - Master\Indiana Tourism\2007 Ad Effectiveness\Online\300x250_dunes

I:\Team David\Ads - Master\Indiana Tourism\2007 Ad Effectiveness\Online\300x250_patoka

IF S1=1 (CINCINNATI), SHOW THE FOLLOWING:

PRINT:

PUT IN THREE GROUPS OF TWO

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\ImgAd-PatokaLake

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\Tourism_dunes

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\Tourism_jetski

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\Tourism_race

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\IN_TOUR_COOP_WEB07

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\07_FSI_FrontCover

TV:

BlueSpringsWestBaden.mpg

mms://sms7.omniproductions.net/IN07_INTV1-1.wmv
mms://sms7.omniproductions.net/IN07_INTV1-1a.wmv

IndianapolisParamount.mpg

mms://sms7.omniproductions.net/IN07_INTV3-1.wmv
mms://sms7.omniproductions.net/IN07_INTV3-1a.wmv

TurkeyRunDunes.mpg

mms://sms7.omniproductions.net/IN07_INTV4-1.wmv
mms://sms7.omniproductions.net/IN07_INTV4-1a.wmv

RADIO:

Indiana Dunes/Turkey Run

mms://sms7.omniproductions.net/IN07_INRA1.wma

Indiana Beach/Blue Spring Caverns

mms://sms7.omniproductions.net/IN07_INRA2.wma

Indianapolis Motor Speedway/White River State Park

mms://sms7.omniproductions.net/IN07_INRA4.wma

ONLINE

I:\Team David\Ads - Master\Indiana Tourism\2007 Ad Effectiveness\Online\
300x250_dunes

I:\Team David\Ads - Master\Indiana Tourism\2007 Ad Effectiveness\Online\
300x250_patoka

IF S1=2 (CHAMPAIGN), SHOW THE FOLLOWING:

PRINT:

PUT IN THREE GROUPS OF TWO

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\
ImgAd-PatokaLake

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\
Tourism_dunes

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\
Tourism_jetski

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\
Tourism_race

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\
IN_TOUR_COOP_WEB07

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\
07_FSI_FrontCover

TV:

HolidayWorldBlueSprings.mpg

mms://sms7.omniproductions.net/IN07_INTV2-1.wmv
mms://sms7.omniproductions.net/IN07_INTV2-1a.wmv

TurkeyRunDunes.mpg

mms://sms7.omniproductions.net/IN07_INTV4-1.wmv
mms://sms7.omniproductions.net/IN07_INTV4-1a.wmv

WestBadenNotreDame.mpg

mms://sms7.omniproductions.net/IN07_INTV5-1.wmv
mms://sms7.omniproductions.net/IN07_INTV5-1a.wmv

RADIO:

Indiana Dunes/Turkey Run

mms://sms7.omniproductions.net/IN07_INRA1.wma

Indiana Beach/Blue Spring Caverns

mms://sms7.omniproductions.net/IN07_INRA2.wma

Indianapolis Motor Speedway/White River State Park

mms://sms7.omniproductions.net/IN07_INRA4.wma

ONLINE

I:\Team David\Ads - Master\Indiana Tourism\2007 Ad Effectiveness\Online\
300x250_dunes

I:\Team David\Ads - Master\Indiana Tourism\2007 Ad Effectiveness\Online\
300x250_patoka

IF S1=3 (CHICAGO), SHOW THE FOLLOWING:

PRINT:

PUT IN THREE GROUPS – THREE-TWO-TWO

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\
ImgAd-PatokaLake

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\
ImgAd-TurkeyRun

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\
Tourism_dunes

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\
Tourism_jetski

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\
Tourism_race

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\
IN_TOUR_COOP_WEB07

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\
07_FSI_FrontCover

TV:

HolidayWorldBlueSprings.mpg

mms://sms7.omniproductions.net/IN07_INTV2-1.wmv
mms://sms7.omniproductions.net/IN07_INTV2-1a.wmv

TurkeyRunDunes.mpg

mms://sms7.omniproductions.net/IN07_INTV4-1.wmv
mms://sms7.omniproductions.net/IN07_INTV4-1a.wmv

WestBadenNotreDame.mpg

mms://sms7.omniproductions.net/IN07_INTV5-1.wmv

mms://sms7.omniproductions.net/IN07_INTV5-1a.wmv

RADIO:

Indiana Dunes/Turkey Run

mms://sms7.omniproductions.net/IN07_INRA1.wma

Indiana Beach/Blue Spring Caverns

mms://sms7.omniproductions.net/IN07_INRA2.wma

ONLINE

I:\Team David\Ads - Master\Indiana Tourism\2007 Ad Effectiveness\Online\
300x250_dunes

I:\Team David\Ads - Master\Indiana Tourism\2007 Ad Effectiveness\Online\
300x250_patoka

IF S1=4 (GRAND RAPIDS), SHOW THE FOLLOWING:

PRINT:

PUT IN THREE GROUPS OF TWO

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\
ImgAd-PatokaLake

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\
Tourism_dunes

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\
Tourism_jetski

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\
Tourism_race

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\
IN_TOUR_COOP_WEB07

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\
07_FSI_FrontCover

TV:

HolidayWorldBlueSprings.mpg

mms://sms7.omniproductions.net/IN07_INTV2-1.wmv

mms://sms7.omniproductions.net/IN07_INTV2-1a.wmv

IndianapolisParamount.mpg

mms://sms7.omniproductions.net/IN07_INTV3-1.wmv

mms://sms7.omniproductions.net/IN07_INTV3-1a.wmv

WestBadenNotreDame.mpg

mms://sms7.omniproductions.net/IN07_INTV5-1.wmv

mms://sms7.omniproductions.net/IN07_INTV5-1a.wmv

RADIO:

Indiana Beach/Blue Spring Caverns

mms://sms7.omniproductions.net/IN07_INRA2.wma

West Baden Springs Hotel/Paramount Theatre
mms://sms7.omniproductions.net/IN07_INRA3.wma

Indianapolis Motor Speedway/White River State Park
mms://sms7.omniproductions.net/IN07_INRA4.wma

ONLINE

I:\Team David\Ads - Master\Indiana Tourism\2007 Ad Effectiveness\Online\
300x250_dunes
I:\Team David\Ads - Master\Indiana Tourism\2007 Ad Effectiveness\Online\
300x250_patoka

IF S1=5 (LOUISVILLE), SHOW THE FOLLOWING:

PRINT:

PUT IN THREE GROUPS OF TWO

I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\
ImgAd-PatokaLake
I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\
Tourism_dunes
I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\
Tourism_jetski
I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\
Tourism_race
I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\
IN_TOUR_COOP_WEB07
I:\Team David\Ads - Master\Indiana Tourism\2006 993127 Ad Effectiveness\Indiana\
07_FSI_FrontCover

TV:

TurkeyRunDunes.mpg
mms://sms7.omniproductions.net/IN07_INTV4-1.wmv
mms://sms7.omniproductions.net/IN07_INTV4-1a.wmv

WestBadenNotreDame.mpg
mms://sms7.omniproductions.net/IN07_INTV5-1.wmv
mms://sms7.omniproductions.net/IN07_INTV5-1a.wmv

IndianapolisParamount.mpg
mms://sms7.omniproductions.net/IN07_INTV3-1.wmv
mms://sms7.omniproductions.net/IN07_INTV3-1a.wmv

RADIO:

Indiana Dunes/Turkey Run
mms://sms7.omniproductions.net/IN07_INRA1.wma

West Baden Springs Hotel/Paramount Theatre
mms://sms7.omniproductions.net/IN07_INRA3.wma

Indianapolis Motor Speedway/White River State Park
mms://sms7.omniproductions.net/IN07_INRA4.wma

ONLINE

I:\Team David\Ads - Master\Indiana Tourism\2007 Ad Effectiveness\Online\
 300x250_dunes

I:\Team David\Ads - Master\Indiana Tourism\2007 Ad Effectiveness\Online\
 300x250_patoka

Q16. Have you seen these print ads before?

- I have seen the print ads before
- I have NOT seen print ads before

Q17. How many times have you seen this TV ad before?

- Never
- Once
- More than once

Q18. How many times have you heard this radio ad before?

- Never
- Once
- More than once

Q19. How many times have you seen this online ad before?

- Never
- Once
- More than once

Q20. Please indicate how much the Indiana ads ...

	Strongly Agree				Strongly Disagree
Makes you more interested in traveling within the state.	5	4	3	2	1
Left you wondering about the location and wanting more information.	5	4	3	2	1
Makes you interested in visiting the state's website.	5	4	3	2	1
Makes the state seem fun and exciting.	5	4	3	2	1
Makes it appear scenic and beautiful.	5	4	3	2	1
Shows something unique and remarkable about the state.	5	4	3	2	1
Portrays it as a place full of unexpected discoveries.	5	4	3	2	1

Q21. Since January, please indicate the types of information you saw or received about the following Indiana, if any.

1. Saw an article or story
2. Saw an ad in a magazine or newspaper
3. Received an e-mail promotion
4. None of these

The following questions are for classification purposes only, and will help us understand different groups of people.

Q22. What is your marital status?

- Married
- Divorced
- Widowed
- Single/Never married
- ~~Prefer not to answer~~

Q23. Including yourself, how many people are currently living in your household?

Q24. If Q21 IS GREATER THAN 1: How many living in your household are children under the age of 18? _____

Q25. Which of the following categories best represents the last grade of school you completed?

- High school or less
- Some College/Technical school
- College graduate
- Post graduate degree
- ~~Prefer not to answer~~

Q26. Which of the following categories best represents the total annual income for your household before taxes?

- Less than \$12,500
- \$12,500 but less than \$20,000
- \$20,000 but less than \$30,000
- \$30,000 but less than \$50,000
- \$50,000 but less than \$70,000
- \$70,000 but less than \$100,000
- \$100,000 or more
- ~~Prefer not to answer~~

Q27. What is your age? _____

Q28. Are you Male Female

Q29. What is your zip code? _____

Sample Type:

DMAs –

1	Cincinnati	150
2	Champaign	125
3	Chicago	150
4	Grand Rapids	125
5	Louisville	150
6	Indianapolis	150
7	Rest of Indiana	150

Total 1000