

NLTRA Mission

To promote tourism and business through efforts that enhance the economic environmental, recreational and cultural climate of the area.

Committee Members: **Chair:** Brett Williams, Agate Bay Realty | **Vice Chair:** Christine Horvath, Squaw Alpine
Eric Brandt, Destination Media Solutions | Terra Calegari, Resort at Squaw Creek
Daniel Dorr, Vail Resort | Todd Jackson, Big Blue Adventure | Judith Kline, Tahoe Luxury Properties
Becky Moore, Squaw Valley Lodge | Melissa Panico, Oliver Real Estate | Nicole Reitter, Tahoe Mountain Resort Lodging
Advisory Committee: Erin Casey, Placer County

AGENDA

TO CALL IN: (605) 475-4842 Access code: 120318

1. Call to Order – Establish Quorum
2. Public Forum-Any person wishing to address the Board of Directors on items of interest to the Board not listed on the agenda may do so at this time. It is requested that comments be limited to three minutes since no action may be taken by the Board on items addressed under Public Forum.
3. Agenda Amendments and Approval
4. Approval of Tourism Development Meeting Minutes from April 24, 2018 **Page 1**
5. **Action Items**
 - A. SMARI Research Proposal for Approval – Daphne **Page 4**
 - B. 2 Year Tourism Development Plan (Draft) for Approval - Daphne
6. Review of Tourism Development Committee Meetings Schedule for 2018 - Daphne
7. Visiting Lake Tahoe website - Daphne
8. Departmental Verbal Reports
 - Conference Sales – J. Neary
 - Leisure Sales – S. Winters
 - Events & Communications – A. Burke
 - Website Content – S. Fallon
 - Public Relations – The Abbi Agency
 - Advertising – Augustine Agency
9. Standing Reports
 - Destimetrics Report
 - Conference Activity Report
 - Lodging Referral Report

10. Committee Member Comments

11. Adjournment

This meeting is wheelchair accessible

Posted online at www.nltra.org



north lake tahoe

Chamber | CVB | Resort Association

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TOURISM DEVELOPMENT COMMITTEE MEETING MINUTES

Tahoe City PUD

Tuesday, April 24, 2018– 2 pm

PRELIMINARY MINUTES

COMMITTEE MEMBERS IN ATTENDANCE: Brett Williams, Becky Moore, Todd Jackson, Eric Brandt, Nicole Reitter (called-in), Judith Kline, Terra Calegari (called-in), Melissa Panico, Christine Horvath, Daniel Dorr (2:30pm)

RESORT ASSOCIATION STAFF: Daphne Lange, Amber Burke, Cindy Gustafson, Sarah Winters

OTHERS IN ATTENDANCE: Shelley Fallon, Allegra,

I. MEETING OF THE MARKETING COMMITTEE

1.0 CALL TO ORDER – ESTABLISH QUORUM

The Marketing Committee meeting was called to order at 2:05 pm and a quorum was established.

2.0 PUBLIC FORUM

No public forum

3.0 AGENDA AMENDMENTS AND APPROVAL

M/S/C (Moore/Brandt) (6/0) to approve the agenda as presented.

4.0 APPROVAL OF MARKETING MEETING MINUTES FROM MARCH 27, 2018

M/S/C (Jackson/Moore) (5/0/1 – Williams abstained) to approve the meeting minutes from March 27, 2018.

5.0 ACTION ITEMS

- **A – SPECIAL PARTNERSHIP FUNDING ALLOCATION – AMBER**

Amber stated that the special event funding application were just reviewed by a committee last week. The applications were for events taking place in 2018 and she received 16 applications. Amber met with all applicants before making funding recommendations based on existing criteria. The committee is recommending allocating \$49,750 of the \$50,000. These funds are already budgeted for this purpose.

Amber shared there were some changes made to this program, and event producers now get 50% up front, and 50% after submitting everything outlined in the criteria after the event. Amber shared one event is getting a little extra help this year, Lake Tahoe Music Festival. They are in need of assistance with digital and social media and the additional funds will be used to hire someone that can help them.

Comments:

- Have we funded the Kids Adventure Games before? Amber shared she didn't think so but they were really hoping these funds could be utilized to market the event in the Bay Area.
- Is the Tahoe City Food & Wine Classic the same as the Tahoe City Wine Walk? Amber shared that it's the same event and JT is really looking at rebranding the event and making it a multi-day event with a new great logo.
- How do you decide to give more than what they asked for to the Northstar Freeride Festival? Amber shared Northstar was granted more to help promote the Stetina's Sierra Prospect event which is the same weekend. All these events tie in to the Interbike event.
- Brett recommended next year to include the dates on the funding allocation spreadsheet and also recommended sharing an upcoming 2 months event schedule with this committee and the Board of Directors.

M/S/C (Brandt/Jackson) (9/0) to approve the Special Partnership Funding Allocation.

• **B - COMMUNITY MARKETING GRANT – AMBER**

Amber stated that the Squaw Valley Business Association (SVBA) receives a \$10,000 community marketing grant. They are required to present a recap of how they utilized the 16.17 Community Marketing Grant funds. The campaign ran October 17, 2017 through October 29, 2017. Given the shoulder season and short run, results were very good. SVBA also requested the \$10,000 Community marketing grant for the 2017/18 Fiscal Year and presented their spending plan. The intention is to utilize the funds for an off-peak spring digital advertising campaign targeting the Southern California market. The ads will direct guests to a landing page that represent all lodging properties in Squaw Valley equally and in alphabetical order. This request was approved by the BACC Committee.

Comments:

- Do we know the budget for West Shore Association and Northstar Business Association? Amber shared she would estimate West Shore Association budget being pretty low and Northstar Business Association is confidential.

M/S/C (Brandt/Calegari) (8/0/1 – Horvath abstained)

• **C – REVIEW AND DISCUSSION FOR BOARD APPROVAL – 3 YEAR TOURISM PLAN**

Daphne shared the process leading up to the draft and the many meeting with community partners. This input is reflective in the draft and she shared this will be reviewed with the Board of Directors at the May 2nd meeting. Their input will then be added to the draft. She recommended this committee provide comments and feedback and she also did a quick review of the Table of Contents.

Comments:

- It was recommended under targeted public relations to have this broken out to what it really includes such as video and social media.
- Visiting Lake Tahoe website was brought up. Is the page doing its job? Are we competing with ourselves? Daphne shared this could be an agenda item for the next marketing cooperative meeting.
- Brett recommended that we articulate our target markets more clearly along with what time of year we are in the different markets.
- Daniel shared that some of the bigger decisions get lost in some of the details. "Grow winter and summer outside of the area" should be better highlighted in the plan. The increased focus on millennials is not a headline item, but feels interspersed. The "Use highly targeted, interest-based email campaigns to educate niche audiences about all the offering", by outlining it in too much details we reduce the ability to innovate as it ties our hands and makes the process more difficult.
- The word millennials has different meaning to different people, maybe change it to be behavioral focused.

- Christine brought up a few years back we did a successful campaign in San Diego. This may be worth considering again. Brett agreed, maybe break out of just being in Orange County, LA area.
- NLTRA many years ago would get all the ski areas involved in the "Learn To Ski" that was usually hosted in beginning of December. This was a very successful and the committee would like to have more discussion on this.
- Cindy shared NLTRA is happy to host another get-together if the committee feel it's needed.
- Sarah shared that each department did a lot of outreach and met with many different partners for their input. This should be added to the plan.
- Daphne shared that they should focus on the Strategic Objectives when they go through the document.
- It was recommended that the Tourism Development Committee have their feedback by Friday, May 4th and that the meeting next month be moved up by a week to May 22nd. The comments and feed-back will then be included.

Action to staff: Add "Learn To Ski" as an agenda item to next month's agenda.

Action to committee members: Deadline for comments and feedback is Friday, May 4th and next month's meeting will be moved up one week until May 22nd.

6.0 COMMUNITY AWARDS UPDATE – DAPHNE

Daphne shared it's the annual North Lake Tahoe Chamber Community Awards Dinner on Thursday. Tables are sold out but lots of great silent auctions available.

Action to Anna: Share link with committee members.

7.0 DEPARTMENTAL REPORTS – AUGUST (All Standing Reports and Departmental reports can be found at: http://www.nltra.org/meetings/meeting_minutes.php?committeeID=1)

- **Conference Sales Leisure Sales**
- **Leisure Sales – Sarah Winters**
- **Events & Communications – Amber Burke**
- **Website Content – Shelley Fallon**
- **Public Relations – The Abbi Agency**
- **Advertising – Augustine Agency**

8.0 STANDING REPORTS

- **Destimetrics August Report**
- **RTIA Passenger and Cargo Report**
- **August Conference Activity Report**
- **August Lodging Referral Report**

9.0 COMMITTEE MEMBER COMMENTS

- Brett shared there are great deals on the new Frontier flight from Reno to Austin.
- Eric brought up there will be lots of road construction in Tahoe City this summer with major impacts, 3 roundabouts. It's important to keep the message positive and get some education pieces out as soon as it's available.

10.0 ADJOURNMENT

Meeting adjourned at 4:05 pm.

Submitted By:

Anna Atwood
Marketing Executive Assistant
North Lake Tahoe Chamber/CVB/Resort Association



north lake tahoe

Advertising Effectiveness & ROI

Submitted by Strategic Marketing & Research Insights

March 2018

Overview of Proposed Research

North Lake Tahoe invests in paid media to influence both leisure travelers and meeting planners in the journey to purchase. Through investment in digital, print, radio, paid social and outdoor advertising, North Lake Tahoe invests nearly \$1 million during the fiscal year to influence both leisure and business travel.

Digital metrics can provide up-to-the moment insights into performance of digital and social media, but they cannot provide an understanding of how they work with other investment and if the advertising ultimately influences travel.

Strategic Marketing & Research Insights (SMARInsights) has developed a procedure for measuring the effectiveness of marketing efforts and providing meaningful feedback. We use survey research to determine recall of the various ad vehicles (through aided recall measures) and subsequent travel to the destination.

While being exposed to advertising is key to impact, it is not enough. Many people are already planning to visit a destination, so ad awareness alone is not enough to claim impact. We focus on incremental travel – the level of travel that would not have occurred but for the



advertising. This is determined by comparing the level of travel among those with no advertising recall to the level of travel among those who have ad recall. This isolates the impact of the marketing and measures the additional travel that was generated.

The survey also gathers a wealth of other data that can help assess and refine marketing efforts. The details of these concepts are included in the following thorough research discussion.

Ad Effectiveness & ROI Research Overview

For a DMO, the impact of the advertising occurs *throughout* the travel decision process. It is critical to understand the impact at each stage of the process, and our research addresses this:

Campaign Goal:	SMARInsights' measure:
EXPOSURE	ADVERTISING AWARENESS
Before advertising can influence travel, potential visitors have to see it. Online surveys enable us to expose respondents to ads to accurately determine advertising recall. Recall of different types of ads is quantified to determine which media are most effective and most efficient.	
MESSAGING	CREATIVE EVALUATION
Reaching the audience is only meaningful if the message is relevant and persuasive. Evaluating creative is difficult, since consumers are not always aware of what motivates them. SMARInsights measures whether ads communicate the key themes they were designed to communicate, motivate consumers to gather more information, and generate interest in visiting the destination.	
SHIFT IN ATTITUDES	IMPACT ON PERCEPTIONS
If the advertising is "working," those who have seen the ads are likely to be more positive about the destination. Respondents rate the destination on a series of image attributes, enabling a review of differences in perceptions between those with and without ad awareness.	
BUILD INTEREST	IMPACT ON INFORMATION GATHERING
SMARInsights' research determines whether ad awareness results in more efforts to gather information about the destination, and whether those who have seen the ads indicate that they are more likely to visit the destination in the future.	
GENERATE TRAVEL	INCREMENTAL TRAVEL
Incremental travel is the level of travel that would not have occurred without the advertising. To determine this, the level of travel among those without advertising recall is used as a baseline and represents the travel that would have occurred without advertising efforts. Additional travel above the baseline level is considered incremental or influenced by the advertising.	

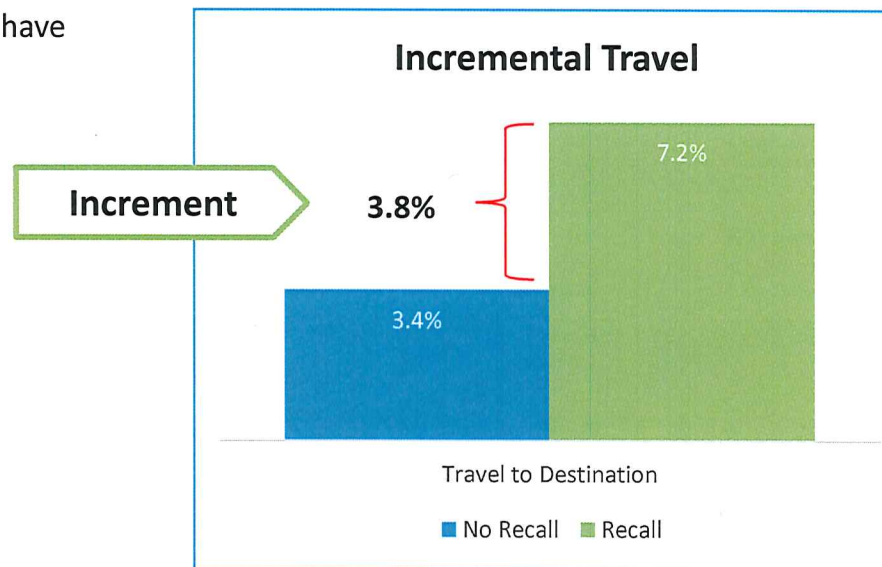
Incremental Travel Methodology

The basis of SMARInsights' advertising effectiveness methodology is measuring the differences in opinions and behaviors between those who have seen the advertising and those who have not. This *incremental travel* provides a good option for determining the additional travel that was generated as a result of the advertising. Those who have not seen the advertising act as a "control group" and provide insight into what would have happened if no advertising was used. By comparing the behaviors of the control group to those who have seen the advertising, the incremental impact can be derived.

This methodology assumes that people will visit North Lake Tahoe even when there is no advertising. The level of travel among those who are unaware of the advertising is the baseline – the level we assume would have occurred anyway.

Additional travel among those with ad awareness is attributed to the ads and is considered incremental travel.

The basis of the calculations relating to the impact of the advertising is the amount of incremental travel.



Data Collection & Questionnaire Development

To provide an accurate measure of advertising awareness, SMARInsights conducts surveys online to allow respondents to view/listen to the advertising and indicate whether they recall the ads. This process for measuring advertising awareness is more accurate than merely unaided recall (asking travelers if they remember any North Lake Tahoe advertising) and ensures that the impact measured relates to the specific advertising run by the bureau. This includes all types of advertising, as well as social channels. While some specific efforts can be difficult to track, we make every effort to get an accurate measure of recall across various media types.

While SMARInsights has a standard process for evaluating the effectiveness and impact of DMO advertising, each project is customized to meet the needs of the client. One of the key areas of customization is the questionnaire development. While we start with a standard framework, we adjust the questionnaire based on feedback and consultation with the client.

In addition to ad recall, respondents are asked to rate the ads on how well they communicate key messages or generate interest in visiting North Lake Tahoe. This information can help identify opportunities to fine tune the media buy or the creative executions. The survey also gathers information about trips to North Lake Tahoe, activities, motivations, spending and other details that are critical in evaluating the current efforts and planning for the future. One issue that we have also addressed for many clients is the “halo” effect of their advertising and how the tourism advertising can help with other community development efforts.

Surveying takes place after the advertising has run and enough time has elapsed for travel to occur. While North Lake Tahoe has the heaviest investment in paid media to influence winter travel, the bureau is interested in evaluating the influence of the media placed throughout the fiscal year. By interviewing in June, the influence of travel throughout the fiscal year can be captured.

Sampling Considerations

A major issue in any research effort is determining the appropriate sample target and sample size – in other words, how many interviews are needed to provide an accurate result. Sample size drives both accuracy and cost, and there is a trade-off between the two.

Having conducted advertising effectiveness research for Visit California for a number of years, SMARInsights estimates travel to the area is around 7% in North Lake Tahoe's target markets. . The goal is to have enough surveys to measure travel and differences between aware and unaware consumers. SMARInsights recommends a survey sample size of 1,400 in the target markets of Los Angeles, New York, Austin, San Francisco and Sacramento. While quotas will not be established for individual markets, this sample size will allow for evaluation of markets in terms of the influence on perceptions and interest in visiting.

Survey respondents are screened to be travel decision makers who regularly take leisure trips. But in addition, given the target of the North Lake Tahoe winter marketing, half the respondents will also be screened as winter leisure travelers in that they have taken a snow-focused trip in the past or are willing to do so. SMARInsights' methodology makes use of national online panels wherein an email with the survey link is sent to a qualified list of potential participants and they are asked to complete the survey.



Analysis & Reporting

One of the key benefits of using SMARInsights is our ability to provide context to your findings through our national benchmarks. We have measured the effectiveness of hundreds of DMO marketing campaigns, and as a result we have developed national benchmarks to help you understand how well you are doing. Our benchmarks tell you how your results compare to other destinations and whether your efforts are superior to other DMOS.

The following outlines the key issues that will be addressed in the report:

Advertising Awareness/Exposure: Advertising awareness, awareness of individual ads and types of media, and cost per aware household reached. This provides information on how different media are performing, as well as the synergies among different media options. This includes national benchmarks for reach based on budget, as well as the efficiency of the media buy.

Advertising Evaluation: Respondents would evaluate the campaign for key messages. In addition, advertising effectiveness would be evaluated based on differences in the image of the destination as well as intent to travel between ad-aware and non-aware respondents. We have national benchmarks for both communication and impact for creative to help identify your competitive position and performance.

Market Perceptions: An assessment of how respondents view the area and identification of specific perceptions that are linked to increased interest in traveling. This can include both traditional tourism measures as well as broader measures relating to business development, desirability as a place to live and others.

Incremental Visitation: Difference in the level of visitation among those who have seen the ads and those who have not.

Economic Impact: The additional spending linked to the incremental travel generated.

Return on Investment/Return on Tax Investment: A comparison of the cost of the campaign to the spending and tax revenues generated by incremental travel to the area.

Conclusions and recommendations relative to the overall effectiveness of the advertising and options for improvement.

Timing & Price

In order to evaluate North Lake Tahoe’s entire fiscal year of paid media, SMARInsights recommends interviewing in June. While most of the media placements focus on the winter travel season, this will allow for the capturing of shoulder season travel as well and account for an entire fiscal year’s budget.

Activity	Timing
Questionnaire Development	Week 1
Survey Programming & Testing	Weeks 2 & 3
Data Collection	Weeks 4 & 5
Data Analysis	Weeks 6 & 7
Report Delivered	Week 8

1,400 surveys	Price
Five target markets: Los Angeles, New York, Austin, San Francisco and Sacramento	\$21,500
In-person presentation of results	\$2,500

MEETING PLANNERS

Meeting Planner Methodology

In addition to targeting leisure travelers, North Lake Tahoe also makes media placements to influence the meetings and convention market. With print and digital buys in trade outlets, the approach to measuring the impact on the meetings business in North Lake Tahoe is similar to that of the leisure methodology.

However, having worked to measure the impact on meeting planners with other destination marketing organizations, the audience can be difficult to reach using national sample vendors. Because of this, SMARInsights recommends meeting planner sample come from both North Lake Tahoe's internal database of planners as well as purchased sample of meeting decision makers.

With the two sample sources, SMARInsights estimates being able to complete 400 interviews with targeted meeting planners. Rather than generating a return on investment, the results would center around the impact of the advertising on the image of North Lake Tahoe as a meeting destination and likelihood to book in the future.

Because meeting planners are more difficult to reach, the cost is considerably different than leisure consumers. The sample from national sample vendors is more than four times that to reach leisure consumers. And even those planners coming from the North Lake Tahoe database will be provided incentive to complete the survey.

400 surveys	Price
200 from North Lake Tahoe's database of planners; 200 from national sample vendors	\$18,000

VENDOR OVERVIEW

SMARInsights at a Glance

Decades of Experience:

Company has 35 years of research experience

27 years of experience in travel and tourism research

- SMARInsights' researchers have conducted research for travel and tourism-related organizations since 1990. In the last year alone we have conducted marketing effectiveness studies for 15 states and more than 20 local DMOs.

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We could profile our organization through an iteration of capabilities and past experience – and we do provide these for your reference. But that is not what we are about. We are researchers who recognize what is important is that research be timely and meaningful and

client focused. Our focus is our clients and their needs, not our products and processes.

This means we have to think and change and tailor what we do every day. And every day we give you our best.



Thinking. Partnering. Customizing. Specializing.

Thinking. Partnering. Customizing. Specializing.

North Lake Tahoe needs a **research partner** who can bring together diverse sources of information across a multiplicity of channels to produce relevant and **meaningful marketing intelligence**.

- A partner who can **innovate** as necessary and access multiple measurement tools
- A partner who **understands** the DMO world and the demands of that world
- A partner who can draw **insights** across studies – and over time
- A partner who can maintain **connectivity** with the past while addressing the needs of the future

We can be that partner. Our concept is to synthesize and integrate data from:

- ongoing surveys
- targeted surveys
- web analytics
- secondary information
- innovative methodologies
- media data

Results: Deliverables that provide an integrated reporting and analysis and marketing intelligence.

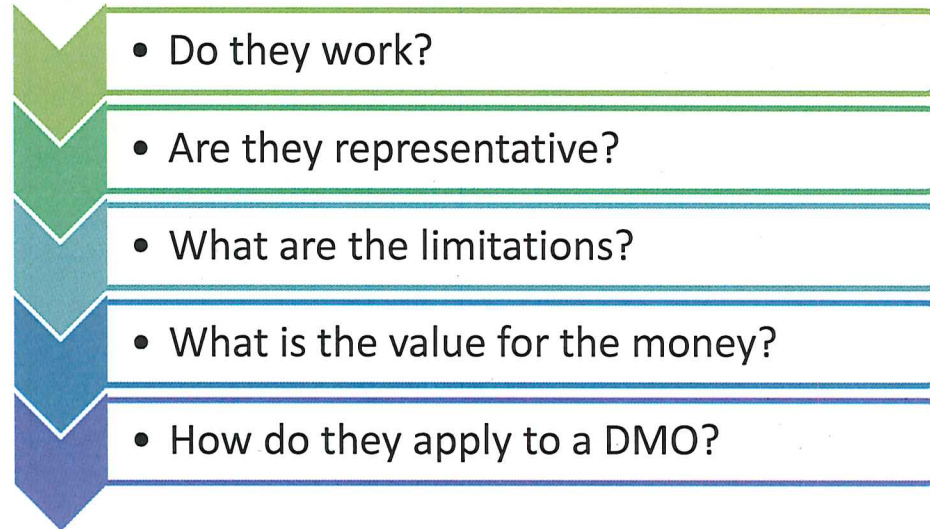
Innovation

Innovation and creativity are essential ingredients in developing and maintaining relevant and actionable research programs in a changing environment.

New tools and metrics need to be constantly identified, tested and employed while recognizing that the resultant findings are comparable, projectable, and reliable.

As a full-service research consulting firm **specializing in travel and tourism**, we are not locked in to any singular approach or technique, panel or platform.

Instead we continually **choose the ones that work the best** for the situation. And when considering new techniques and technologies we review them critically:

- 
- Do they work?
 - Are they representative?
 - What are the limitations?
 - What is the value for the money?
 - How do they apply to a DMO?

Grounded in Research and Tourism

Strategic Marketing & Research Insights (SMARInsights) has extensive qualifications in terms of market research generally and destination-related research specifically. In addition to being qualified researchers, we have **extensive experience in tourism marketing**. We have worked with many tourism organizations and destinations and understand the issues they are facing.

SMARInsights' researchers have conducted research for travel and tourism-related organizations since 1990. In the last year alone we have conducted marketing effectiveness studies for 15 states and more than 20 local DMOs.

Given the scope of our work in marketing effectiveness **we are continually looking forward to innovate** with new solutions and methodologies, but we ground these efforts on our understanding of the tourism product and the organization's goals in promoting it. We understand that new is not always better and that the credibility of the numbers and the organization are paramount.

Our mission is to provide each client with **personalized consultation based on fully integrated marketing research services**. We endeavor to distinguish ourselves by exceeding our clients' expectations with a combination

of high quality, industry-specific marketing consultation, primary research, and analytical expertise at competitive prices.

SMARInsights is a **full-service research company**, and our staff coordinates all aspects of each research program. We manage the research needs of our clients from beginning to end. We develop the research plan and implement the project, including data collection and analysis.

By offering a full range of in-house services, **we maintain quality control and ensure that every step of the research process is implemented correctly, accurately, on time, and within budget**. We bring our experience to the research design and analysis process to ensure that the results are meaningful and actionable. We also understand your tight deadlines and your need to have information in real time. Finally, our research findings are not laced with research jargon, thus making them easier to understand and implement.

References



**Greater Palm Springs Convention
and Visitors Bureau**

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Tourism Clients Since 2011

Visit Albuquerque

Client since 2017

2016-2017 Advertising Effectiveness



Arizona Office of Tourism

Client since 2000

2011-12 Advertising Effectiveness & ROI

2013 Image & Positioning

2013 Concept Testing

2014-17 Ad Effectiveness

2017 Creative Concept Testing

2017 Creative Image Testing

Arkansas Department of Parks & Tourism

Client since 2017

2017 Market Potential Research

2017 Advertising Effectiveness Research

2017 Visitor Profile Research

Asheville (N.C.) Convention & Visitors Bureau

2013 Brand & Market Analysis

2013 Market Assessment Research

2016 Ad Effectiveness Research

Visit Bloomington (Ind.)

2018 Visitor Profile

Branson Convention & Visitors Bureau

Client since 2014

2014 Advertising Creative Testing

2014 Website Evaluation Web Labs

2014 Branding

2015 + 2017 Creative Testing FGs



California Tourism (Visit California)

Client since 2002

2012 Web Evaluation & Integrated ROI

2012-17 Domestic Ad Effectiveness & ROI

2012-17 Canadian Ad Effectiveness & ROI

2012-17 Australia Ad Effectiveness & ROI

2012-17 UK Ad Effectiveness & ROI

2013 Point of View Advertising Research Summary

2013 Global Creative Testing

2013-15 Domestic Tracking Research

2013-14 Canada Tracking Research

2013-14 UK Tracking Research

2013-14 Australia Tracking Research

2013-14 Domestic Website Satisfaction

2014-17 China Ad Effectiveness & ROI

2014-17 Mexico Ad Effectiveness & ROI

2014-15 Domestic Web Evaluation & ROI

2014 Domestic Business Travel ROI

2016 Super Affluent Ad/Website Tagging-US/UK/Canada

2017 Global ROI



Chicago Convention & Visitors Bureau

Client since 2012

2012-17 Winter Ad Effectiveness & ROI

2012-17 Non-winter Ad Effectiveness & ROI

2013 Texas Market Ad Testing

2017 Creative Testing

2017 International Tagline Testing

2017 Theater Campaign

Chickasaw Nation

2015 Chickasaw Ad Effectiveness – Awareness and Travel

2016 Chickasaw Adventure Road Ad Effectiveness – Awareness



Colorado Tourism Office

Client since 2012

2012-17 Ad Effectiveness & ROI Research

2014 Market Analysis

2014 Requestor Evaluation Research

Summer Awareness & ROI

2018 Creative Testing

Continued on next page

Tourism Clients Since 2011



Dallas Convention & Visitors Bureau
Client since 2013
 2013-17 Ad Effectiveness & ROI
 2017 Focus Groups

Gatlinburg Convention and Visitors Bureau
Client since 2013
 2013-17 Ad Effectiveness & ROI
 2013-16 ZIP Code Analysis
 2016 Phone App Evaluation
 2017 Wildfire Impact



Georgia Department of Economic Development (Tourism)
Client since 2011
 2011-17 Ad Effectiveness & ROI
 2015 Ad Effectiveness Benchmark Aware
 2016 Image and Film Research



Visit Greenville (SC)
Client since 2015
 2015-18 Ad Effectiveness & Conversion
 2017 Washington, DC, Airport Study



Hamilton County (Ind.) Tourism
Client since 2002
 2011 Visitor Profile Research
 2012-14 Ad Effectiveness Research
 2013 Web Lab Focus Groups
 2013 Logo Testing Research
 2013 Names Testing Research
 2014 Conversion Research
 2015 Visitor Profile Pilot
 2015 Chicago ROI
 2016 Potential Product Testing
 2017 November Meeting Facilitation
 2018 Hamilton County Parks

Indiana Office of Tourism Development
Client since 1995
 2014-17 Ad Effectiveness and ROI



Los Angeles Tourism & Convention Board
Client since 2012
 2012, 2017 Creative Testing Research
 2013-17 Ad Effectiveness & ROI
 2012 Canadian Market Research
 2012 Kissimmee Holiday Ad Awareness Research
 2014 Ad Concept Testing
 2014 Market Potential Model
 2014 Ad Concept Testing
 2016 China Efforts with California

Mammoth Lakes, Calif.
Client since 2013
 2013-2018 Ad Effectiveness & ROI
 2016, 2018 Visitor Profile
 2016, 2018 Air Service Study
 2016, 2018 Visitor Volume Estimate

Continued on next page

Tourism Clients Since 2011

Miami Convention & Visitors Bureau
2017 Advertising Effectiveness Study

Pure Michigan
2017 Advertising Effectiveness



Missouri Division of Tourism
Client since 1997

2005 Canadian Visitor Research
2006-11 Advertising/Creative Testing
2008, 2010 Website Development Testing
2005-17 Ad Effectiveness & ROI
2011 Branding Research
2011 Print Ad Creative Testing
2012 Missouri Branding Focus Groups
2012 Missouri Ad Concept Focus Groups
2014 Segmentation Research
2015 Digital Media Effectiveness
2015 Ad Testing Focus Groups
2017 Missouri Market Potential Model



Monterey County Convention & Visitors Bureau

Client since 2009
2009-2018 Ad Effectiveness & ROI
2009 Visitor Profiling Research
2013 Initial Segmentation Review
2013 Market Segments Qualitative Testing
2013 Conference Center Research
2014 Segmentation Research

Mount Hood Territory, Oregon

2013 Mount Hood Ad Effectiveness & Branding
2016 Mount Hood Ad Effectiveness, Trending & Visitor Profile



New Hampshire Division of Travel & Tourism Development

Client since 2016
2016 Ad Eff - Awareness and ROI
2016 Image & Positioning
2016 Visitor Profiling
Economic Impacts, Legislative Breakouts, Lodging Reports



North Dakota Tourism Division

Client since 2012
2012-17 Overnight and Day Visitor Research
2013 Canadian Overnight & Day Travel Assessment
2016-17 Ad Eff & Visitor Profile Research
2017 Lodging Reports
2017 Economic Impact
2017 Visitor Volume
2017 Adara Integration
2016-17 Website Effectiveness
2017 Creative Copy Testing

Greater Palm Springs (Calif.) Convention & Visitors Bureau

Client since 2013
2013 Advertising Testing Research
2013 Print Creative Research
2013-18 Ad Effectiveness & ROI
2014,15 Creative Testing
2018 Image Study

Park City (Utah) Chamber/Convention & Visitors Bureau

2012,16 Winter Resort & Luxury Consumer Comparison
2016 Creative Validation
2017 Winter Ad Effectiveness & ROI

Continued on next page

Tourism Clients Since 2011

St. Louis Convention & Visitors Association

Client since 1996

- 2005 - 2014 Conversion & Ad Effectiveness Research
- 2015 Image & Creative Testing Focus Groups
- 2015 Image Research – Chicago
- 2015-17 Summer Ad Effectiveness
- 2015 Airport Study
- 2017 Washington DC Media Effectiveness

San Antonio Convention & Visitors Bureau

- 2014 Advertising Effectiveness Research
- 2015 Awareness & Image Study
- 2017 Awareness & Image - Domestic
- 2017 Awareness & Image - Mexico
- 2017 Awareness & Image - Canada

SEAWORLD PARKS & ENTERTAINMENT

SeaWorld Entertainment

Client since 2011

- 2011 Busch Gardens – Williamsburg Research
- 2012 Aquatica Pass/Local Research
- 2012 SeaWorld – San Antonio Research
- 2013 Busch Gardens – Tampa Research
- 2014 SeaWorld Discovery Cove Awareness

- 2014-16 Consumer Offer Testing
- 2015 BGT Howl-O-Scream Position Testing
- 2017 SeaWorld San Diego Attraction Communication Testing Research
- 2017 SeaWorld Orlando Attraction Communication Testing Research
- 2017 SeaWorld Busch Gardens Williamsburg Summer Event
- 2018 SeaWorld Park to Planet



South Carolina Department of Parks, Recreation & Tourism

Client since 1998

- 2011 Visitor Profile Research
- 2011 Film Commission Research
- 2011-17 Ad Effectiveness
- 2012 Film & Print Advertising Testing
- 2012 SCRPT Park Visitor Profile
- 2012 SCRPT Website Visitor Profile
- 2012 Film Impact – Focus Groups and Quantitative Research
- 2012 Website Intercept
- 2012 Welcome Center Research
- 2013 CY Advertising Effectiveness - Leisure, Golf & PR
- 2015 Welcome Center Focus Groups
- 2017 Total Eclipse Research
- 2017 Creative Test
- 2017 In-State Test

Sweetwater County (Wyo.) Travel & Tourism

- 2015-17 Conversion Research

Tennessee Department of Tourist Development

- Client since 2015
- 2015, 2017 Ad Effectiveness & ROI



It's like a whole other country.

Texas Tourism

Client since 2009

- 2012 Texas Tourism Ad Testing
- 2012-14 Ad Effectiveness, Conversion & Website Impact Research
- 2014 International Baseline Research
- 2014-18 Mexico & Canada Ad Effectiveness & Visitor Profile Research
- 2014 Spot Market Ad Effectiveness
- 2014 Market Potential
- 2018 Creative Ad Online FG Test

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Tourism Clients Since 2011



Utah Office of Tourism

Client since 2006

2006-17 Winter Ad Tracking & ROI
2007-17 Non-winter Ad Tracking & ROI
2012-15 Integrated ROI
2013 Image Research

Go Wichita

Client since 2015

2015 Creative Testing
2015 Meeting Planner Creative Testing
2015 Holiday Creative Testing
2015-16 Summer Ad Effectiveness
2015 Meeting Planner Ad Effectiveness
2015-17 Holiday Ad Effectiveness
2016 Summer Creative Testing
FY2016-17 Ad Effectiveness

Wisconsin Dells

2006 Website Survey
2006 Conversion Research
2006, 11, 14-17 Ad Effectiveness Research
2006 Advertising Testing Research
Door County CVB Focus Groups
2016 Meeting Planner Research



Wyoming Travel & Tourism

Client since 2006

2006-12 Ad Tracking & ROI Research
2006-11 Visitor Profiling Research
2012-17 Integrated Ad & Website ROI
2012-16 Overnight Visitor Profile & ROI
2012-14 Sweetwater County Travel
Council Conversion Research
2013, 16 Cheyenne Frontier Days Website
Evaluation Research
2013 Cheyenne CVB Website Evaluation
Research
2014 Wyoming Visitor Segmentation
Research

RESEARCH TEAM

David Seiferth, Ph.D., founder



PROFESSIONAL PROFILE

Dr. Seiferth is a central contributor to the development and use of new methodologies to enhance the value of research while minimizing costs and continues to improve the firm's analytical product.

He has helped develop new options for image and positioning research, advertising effectiveness, visitor segmentation, visitor profiling, product development for tourism destinations and market targeting, and helped develop methodologies to identify key visitation motivators.

He has been the leader in developing the methodology for the integrated tourism ROI that incorporates multiple elements of a DMO's marketing program.

WORK EXPERIENCE

Founder and President of Strategic Marketing & Research Insights (SMARInsights), 2014 – present

Founder and Executive Vice President of Strategic Marketing & Research, Inc., 1985 – 2013

President of Market Search, 1984 – 1985

VP of MZD Advertising, 1983 – 1984

Research Director at MZD Advertising, 1980 – 1983

RELEVANT RESEARCH EXPERIENCE

- Serves as Senior Consultant for many clients, and is involved in the research design and analysis for conversion, visitor profiling, competitive analysis, customer awareness, product development, and database research.
- Lead consultant on SMARInsights' Internet and mobile initiatives – development and implementation of web surveys for many clients across multiple industries.
- Developed and implemented numerous research programs with a focus on understanding consumer behavior and their decisions in several industries, including tourism, utilities, banking, restaurants and retail development.

EDUCATION

Ph.D. Indiana University, 1979

B.A. Ithaca College, 1975

Denise Miller, Executive Vice President



PROFESSIONAL PROFILE

Denise has a solid track record of 30 years experience and accomplishment in marketing and research.

She was the director of two convention and visitors' bureaus in Indiana, and served for three years as the State Travel Director in Indiana.

By combining her marketing and research expertise, she brings valuable insight to developing new consumer programs and refining the marketing and implementation of existing programs.

WORK EXPERIENCE

Executive Vice President of Strategic Marketing & Research Insights, 2014 – present

Vice President of Strategic Marketing & Research, Inc., 1998 – present

Research Analyst at Strategic Marketing & Research, Inc., 1992 – 1998

Director of Indiana Department of Tourism, 1989 – 1992

Director of Bloomington Convention & Visitors Bureau, 1984 – 1989

Director of South Bend Convention & Visitors Bureau, 1977 – 1984

RELEVANT RESEARCH EXPERIENCE

- Designed and conducted numerous studies among leisure travelers, meeting planners and group tour operators, including perception studies, destination selection, satisfaction and advertising.
- Designed and implemented Advertising Effectiveness and ROI research for numerous clients.
- Conducted hundreds of group discussions for clients relating to positioning, advertising, decision-processes and others. Has conducted groups both in-person and online.

OTHER PROFESSIONAL ACTIVITIES

- Served as President of Travel and Tourism Research Association International and Hamilton County (Ind.) Tourism
- Served as President of the Association of Indiana Convention & Visitors Bureaus
- Held the offices of Vice President, President & Chairman of the Board of the CenStates Chapter of the Travel and Tourism Research Association

EDUCATION

B.A. University of Notre Dame, 1976

Alisha Valentine, Account Supervisor



PROFESSIONAL PROFILE

Alisha brings the perspective of a destination marketer to her role in data analysis and reporting. As a former marketing director for a state travel organization, she understands the kinds of actionable information tourism clients need. She plays an integral role in client contact; ensuring projects keep moving through development, data collection, analysis and reporting.

Since joining SMARInsights, Alisha has been the lead analyst on advertising effectiveness projects and heading the website qualitative testing process.

WORK EXPERIENCE

Research Analyst, Strategic Marketing & Research Insights, 2007-present

Director of Communications and Development, Coalition for Homelessness Intervention and Prevention, 2005-2007

Marketing Manager, Indiana Office of Tourism, 2001-2004

RELEVANT RESEARCH EXPERIENCE

Responsible for questionnaire development, analysis, and reporting on the following projects, among others:

- Advertising Effectiveness and ROI

- Travel Guide and Website Conversion and Integrated ROI
- Advertising Testing (Quantitative and Qualitative)
- Market Assessment
- Website Testing Qualitative Focus Groups

RELEVANT RESEARCH EXPERIENCE

Responsible for questionnaire development, analysis, and reporting on the following projects, among others:

- VISIT FLORIDA Advertising Effectiveness & ROI
- Wyoming Travel & Tourism Advertising Effectiveness & ROI
- Colorado Tourism Advertising Effectiveness & ROI (Winter and Summer)

OTHER PROFESSIONAL ACTIVITIES

- Chair of the Board, CenStates Chapter of the Travel & Tourism Research Association, 2014-2016.
- President, CenStates Chapter of the Travel & Tourism Research Association, 2012-2014.
- Board of Directors, CenStates Chapter of TTRA, 2007-2016

EDUCATION

B.A. – Franklin College

Shelly Lindley, Project Manager



PROFESSIONAL PROFILE

Shelly's role is to provide the "glue" that holds each research project together during implementation. Shelly coordinates with other SMARInsights staff such as data collection and data processing to deliver information in a timely manner and to track the availability of results. She provides documentation and updates of both progress and budget information.

In addition, Shelly handles details such as sample management, administrative information, and billing. She ensures project timelines are maintained throughout the research effort and results are available when promised.

Shelly brings not only a wealth of experience and attention to detail, but also a strong orientation and background in customer satisfaction systems designed to provide ongoing feedback to our clients.

WORK EXPERIENCE

Project Coordinator & Director at Strategic Marketing & Research Insights, 1994 – present
Call Center Manager & Account Manager, Sky Alland Research (isky), 1990 – 1994
Operator Services Supervisor & Marketing Manager, Indiana Bell, 1988 - 1990

RELEVANT RESEARCH EXPERIENCE

- Ad Effectiveness and Creative Testing Research
- Name and Image Research
- Web Testing & Concept Testing Research
- Website & Segmentation Research
- Ad Effectiveness & Creative Testing Research
- Creative Testing, Image & Positioning & Ad Effectiveness Research
- Visitor Profile Research

EDUCATION

B.S. Marian College