



Advertising Effectiveness Research

June 2023

SMARinsights

Background & Objectives

- State of Washington Tourism (SWT) has partnered with SMARInsights to measure the effectiveness of the state's advertising campaigns since 2022.
- This wave of research evaluates the return on investment (ROI) and other impacts of the campaign that ran from September 2022 through mid-March 2023. Data collection occurred immediately following the end of the campaign, measuring the travel that was influenced during the campaign.
- The research will provide public accountability by quantifying the incremental travel that can be attributed to the campaign, and the resulting economic benefits to the State of Washington.
- Our approach to advertising research is to also build in measurements that inform campaign development with insights that enhance advertising efforts and increase future effectiveness.

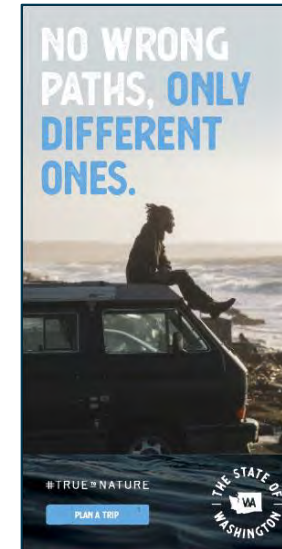
Methodology

- Data collection was conducted via an online survey among leisure travelers in target markets determined by SWT.
- National sample providers with demographically representative panels were used in order to project the research to the population.
- The survey was conducted in March 2023. A total of 2,260 surveys were completed in the target markets.
- After data collection, the results were cleaned, coded and weighted to the population.

Tier	Market	Surveys Completed
Tier 1	Vancouver, Canada	501
	Oregon	501
	San Francisco	501
Tier 2	Montana	251
	Idaho	251
	Denver	255
Total		2,260

Campaign Overview

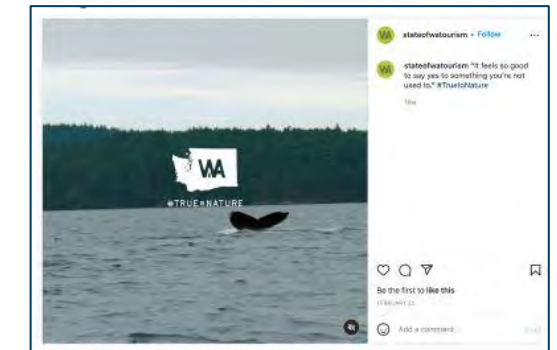
- The 2023 *True to Nature* ad campaign included digital display, social media, and video. The ads ran from September 2022 through March 2023.
- The ads leverage the natural and rugged beauty of Washington State.
- The complete collection of advertising used in the survey is included in the Appendix of this report.



Sample Digital Ad



Sample Video Ad



Sample Social Ad

Insights

The 2022-2023 campaign *True to Nature* influenced 60,000 incremental trips to Washington State during September 2022 through March 2023, generating \$75 million in visitor spending with a return of \$69 for each dollar invested.

- 38% of travelers in target markets were aware of the advertising, for a reach of 2.5 million households.
- The campaign was most effective in reaching 18- to 34-year-olds, diverse consumers, and families with children. Interestingly, aside from the younger cohort of consumers, the awareness levels of the various types of media were consistent.

Ad-aware visitors did more, spent more, and stayed longer.

- Ad-aware visitors spent \$420 more per trip and participated in two more activities compared to unaware visitors. Ad-aware visitors were more likely to experience state and national parks, take a sightseeing tours, and go on scenic drives.

The creative ratings for the campaign remain exceptionally high.

- All communication attributes that were tested scored above the SMARInsights' threshold for excellence, placing them in the top 10% of campaigns. The overwhelming majority of consumers exhibited a positive response toward the creative.

Campaign Impacts
September 2022 – March
2023

38%
Awareness

2.5 million
Aware Households

60,000
Incremental Trips

\$75 million
Visitor Spending

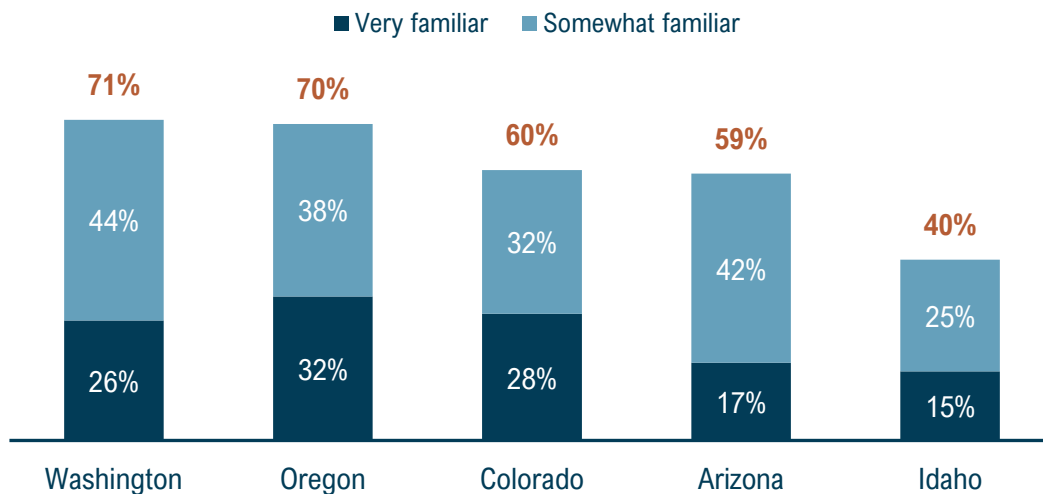
\$69 : \$1
ROI

Familiarity

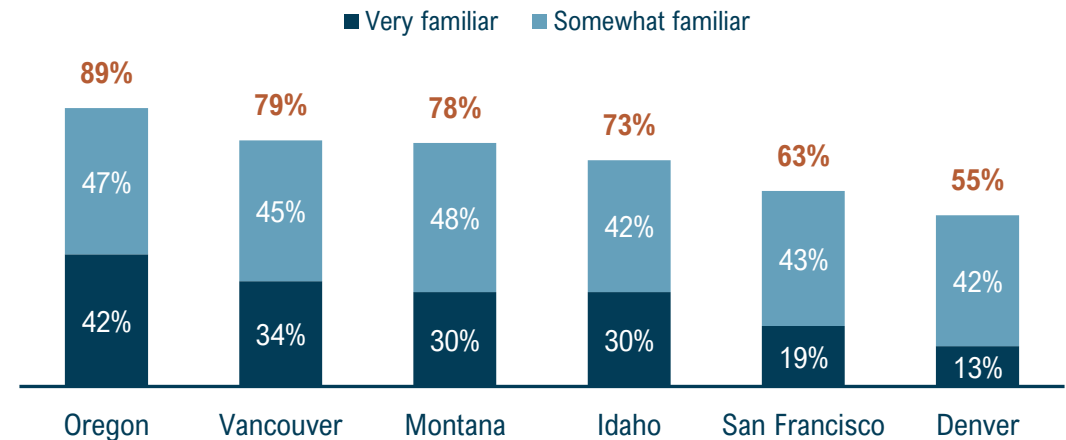
Washington State has the highest level of familiarity among consumers in the target markets.

- 71% of consumers in the target markets are familiar with the State of Washington as a leisure destination.
- 89% of travelers in Oregon are familiar with the state, the highest among target markets. Next are other nearby markets Vancouver and Montana. Consumers in Denver and San Francisco are less familiar.

Familiarity with the Comp Set



Familiarity with Washington as Leisure Destination

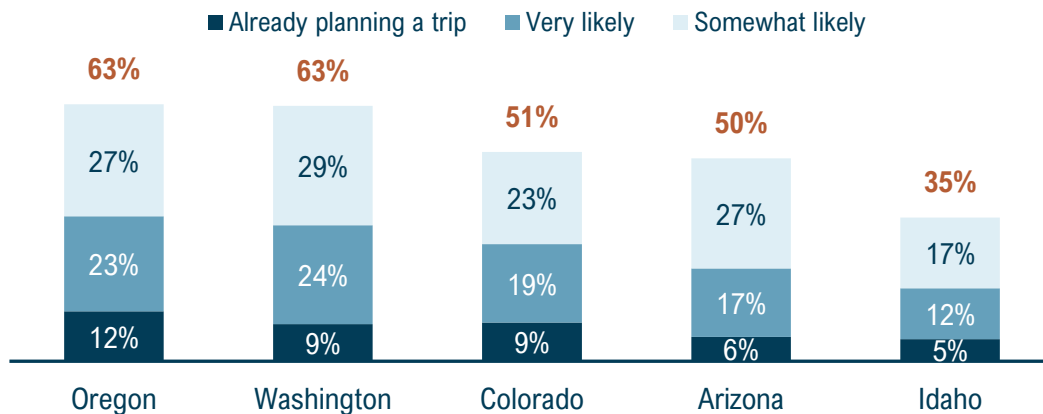


Likelihood to Visit

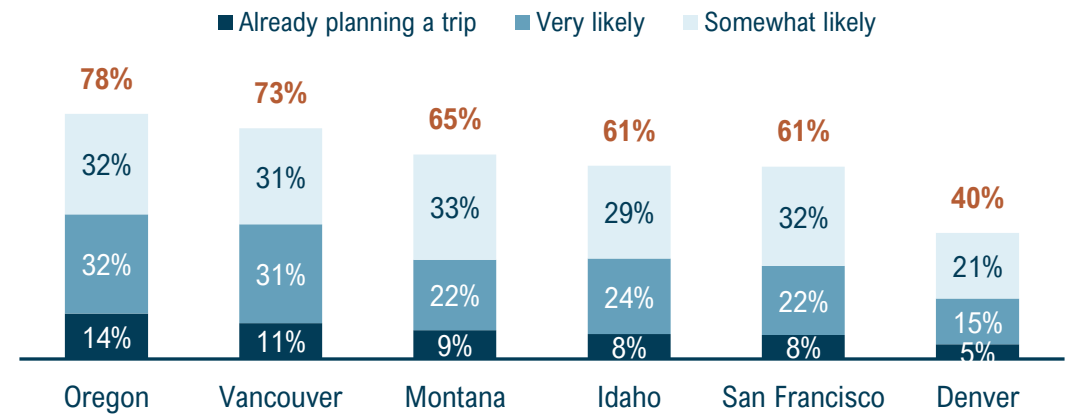
Travelers in the target markets are most likely to visit Oregon and Washington in the coming year.

- Two-thirds of consumers are likely to visit or are already planning a trip to Washington.
- Travelers in Oregon, Vancouver, and Montana show the strongest likelihood to visit. This is unsurprising given their high level of familiarity.

How likely are you to take a leisure trip to any of the following states in the next year?



Likelihood to take Leisure Trip to Washington in the Next Year



Advertising Awareness



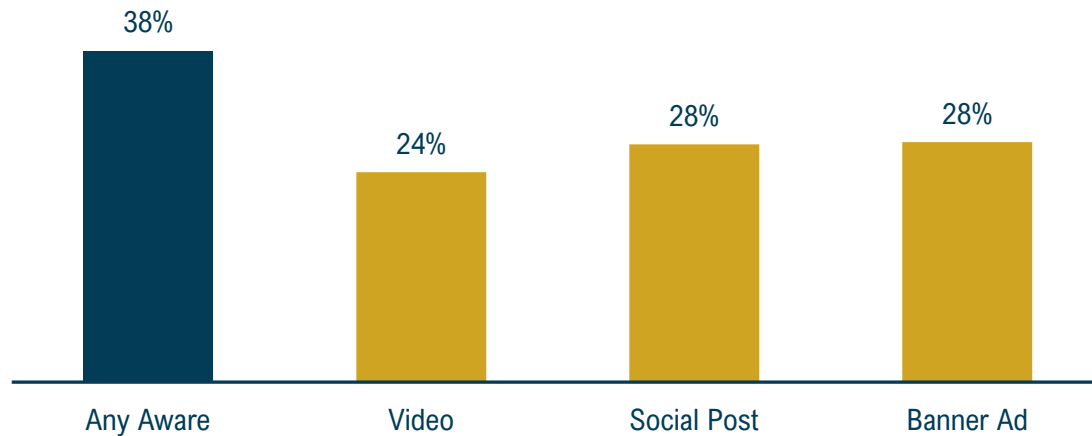
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Total Advertising Awareness

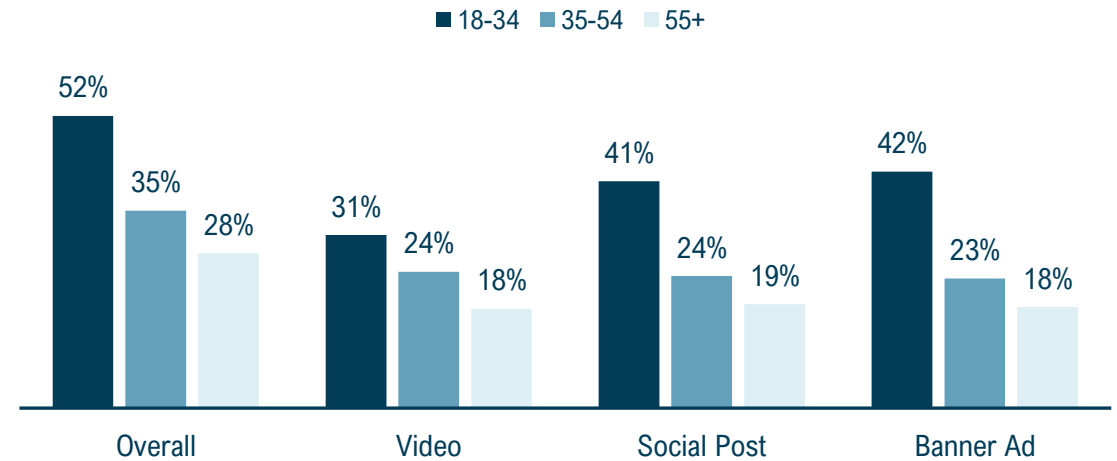
Overall, the campaign reached 38% of travelers in target markets.

- Of the advertising media, the banner ads and the social media posts were equally effective, reaching 28% of consumers.
- The advertising achieved high awareness levels among 18- to 34-year-olds. These consumers have high levels of engagement with media and typically have higher levels of awareness. Reaching Boomers can be more challenging as media consumption differs by generation.

Awareness of Advertising Medium



Awareness by Age Group

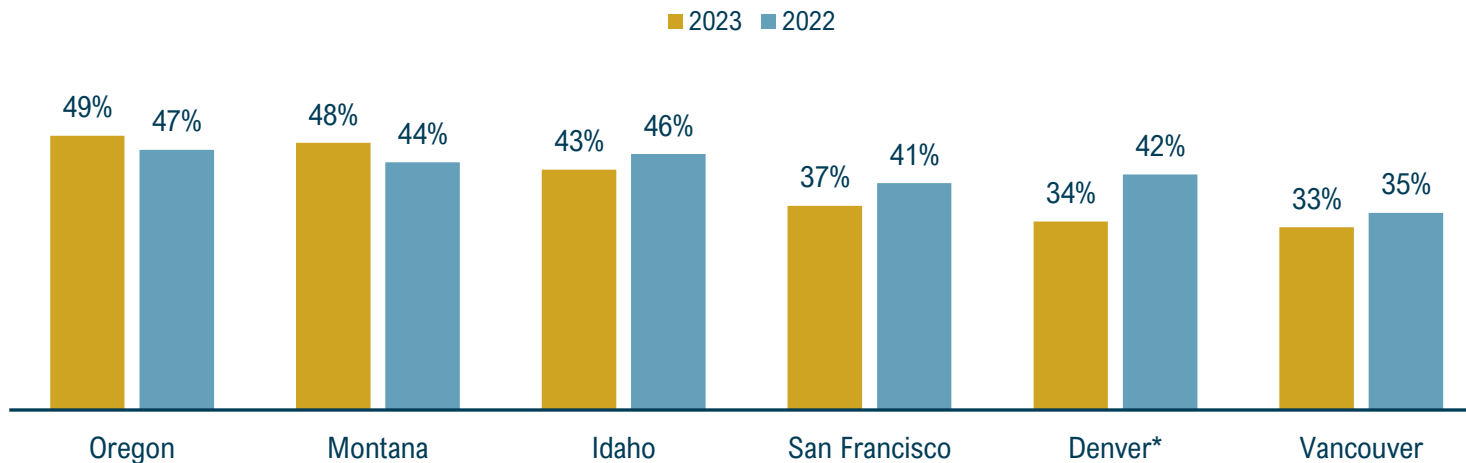


Campaign Awareness by Market

Awareness was highest in border states and slightly lower than last year.

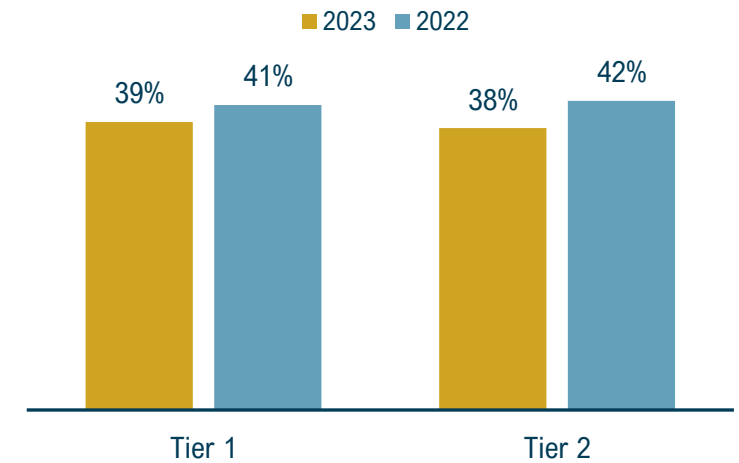
- Travelers in Oregon, Montana, and Idaho reported the highest awareness levels.
- Ad-awareness proportions grew in Oregon and Montana. The advertising was less effective in reaching the other markets year over year.
- Awareness levels by tier are virtually equal, albeit slightly less than in 2022.
- It is worth noting that the media spend was lower for the 2023 campaign which could explain the lower awareness.

Awareness by Market



*The Denver market is comparing Denver awareness in 2023 and Colorado awareness in 2022.

Awareness by Tier



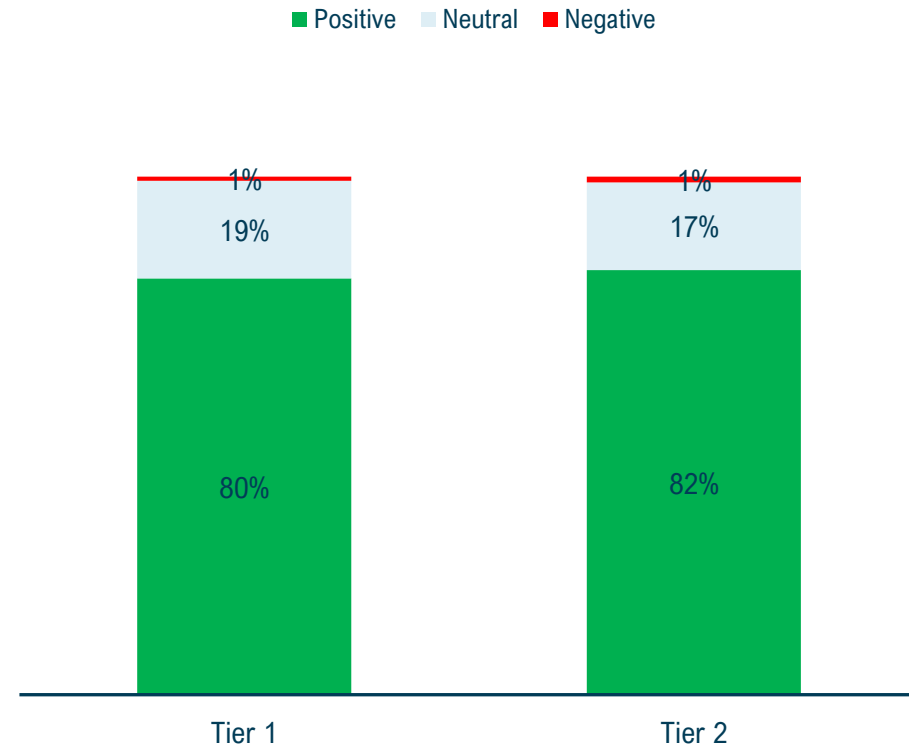
*Tier 1 included California Other (Chico, Eureka, Palm Springs, Santa Barbara) and Tier 2 included Arizona in 2022.

Creative Evaluation

The vast majority of consumers had a positive reaction to the advertising.

- More than 80% of consumers report a positive reaction to the advertising.
- Reactions year-over-year remain mostly positive with nearly identical levels of positivity.

What was your reaction to this campaign?

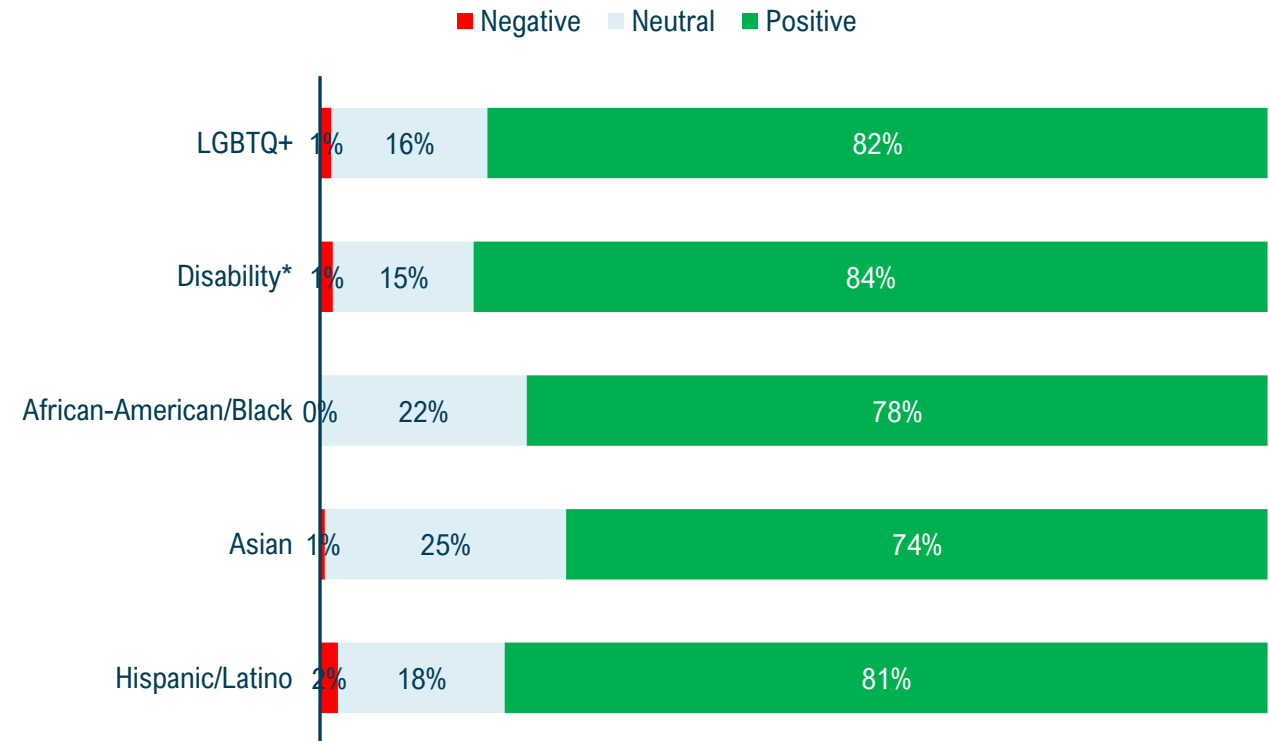


Creative Evaluation by Demographic Groups

Many demographic groups had similarly positive reactions to the ads.

- African-American and Asian consumers were less positive, with slightly greater proportions of neutral responses.

Reaction by Demographic Group

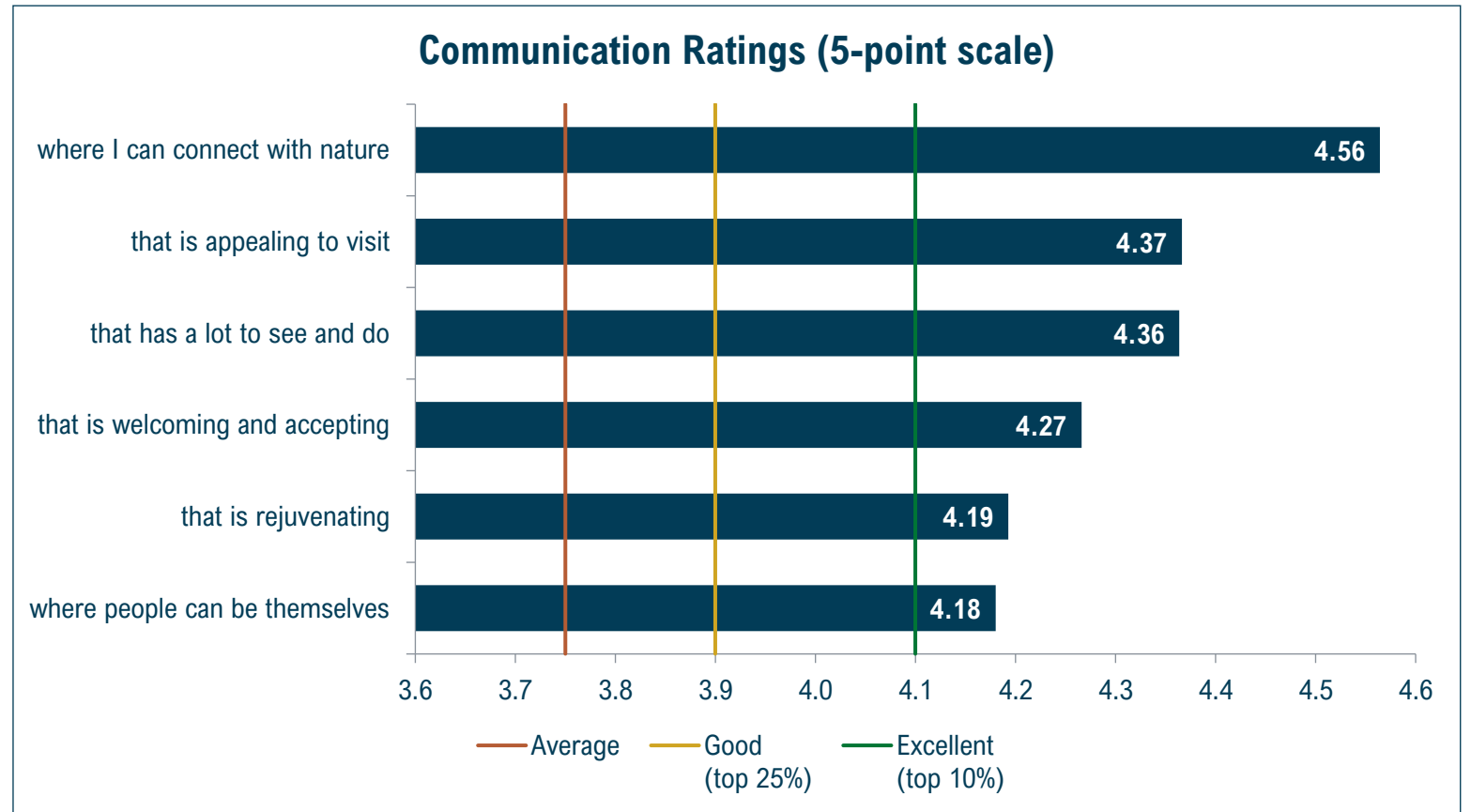


*Do you have a physical disability or travel regularly with someone who does?

Communication Ratings

The messaging of the campaign continues to surpass the SMARInsights threshold for excellence for all intended messages.

- In short, the campaign effectively communicates its goals. This is an exceptional performance in terms of communication.



Q. Please indicate how much you agree that this campaign makes Washington State look like a place...

Communication Ratings by Demographic Groups

African-American and Asian travelers rate the communication attributes slightly lower than other demographic groups.

- The communication ratings vary by various demographic groups.
- African-American/Black and Asian consumers give lower ratings in general.

Excellent (top 10%)
Good (top 25%)
Average

Communication Ratings (5-pt Scale)	LGBTQ+	Disability*	African-American /Black	Asian	Hispanic/Latino
that is appealing to visit	4.49	4.43	4.05	4.19	4.50
where people can be themselves	4.14	4.22	4.04	4.09	4.32
that is rejuvenating	4.29	4.24	3.95	4.06	4.23
that has a lot to see and do	4.36	4.43	4.20	4.19	4.49
that is welcoming and accepting	4.31	4.27	4.00	4.18	4.40
where I can connect with nature	4.61	4.54	4.44	4.46	4.65

*Do you have a physical disability or travel regularly with someone who does?

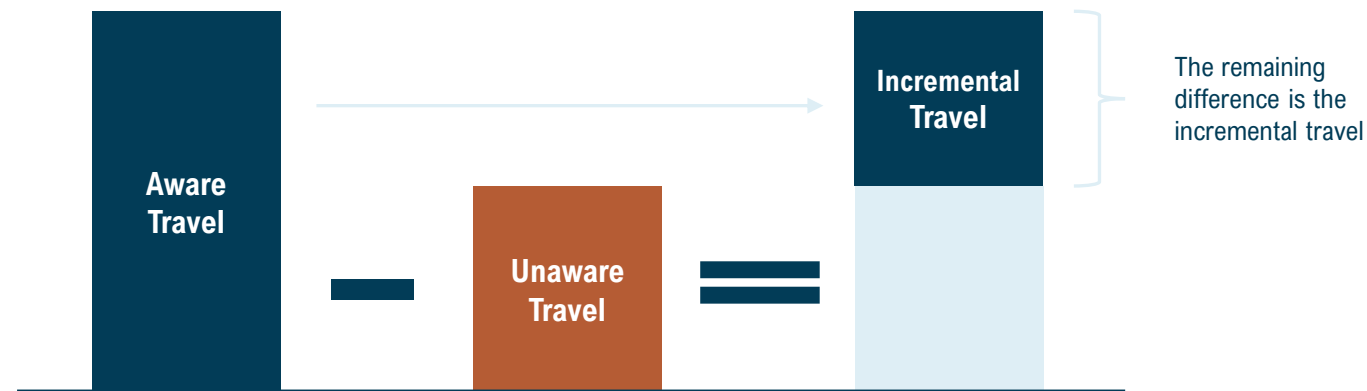
Advertising Impact & ROI



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Measuring Ad-Influenced Travel

- While generating information gathering and strengthening perceptions are good indicators of advertising performance, effectiveness is ultimately measured by the quantity of influenced trips.
- SMARInsights' methodology for measuring the impact of destination advertising relies on establishing a base rate of travel. Certainly, there would be travel to Washington even without any paid advertising. Thus, not all visitation, or even visitation by ad-aware households, is attributed to the ads. Rather, the level of travel among *unaware* households is considered the baseline that would occur without advertising. Any travel above that baseline by *ad-aware* households is what is considered influenced, or incremental.
- We account for travel during the time frame in which the ads were running, September 2022 through March 15, 2023.

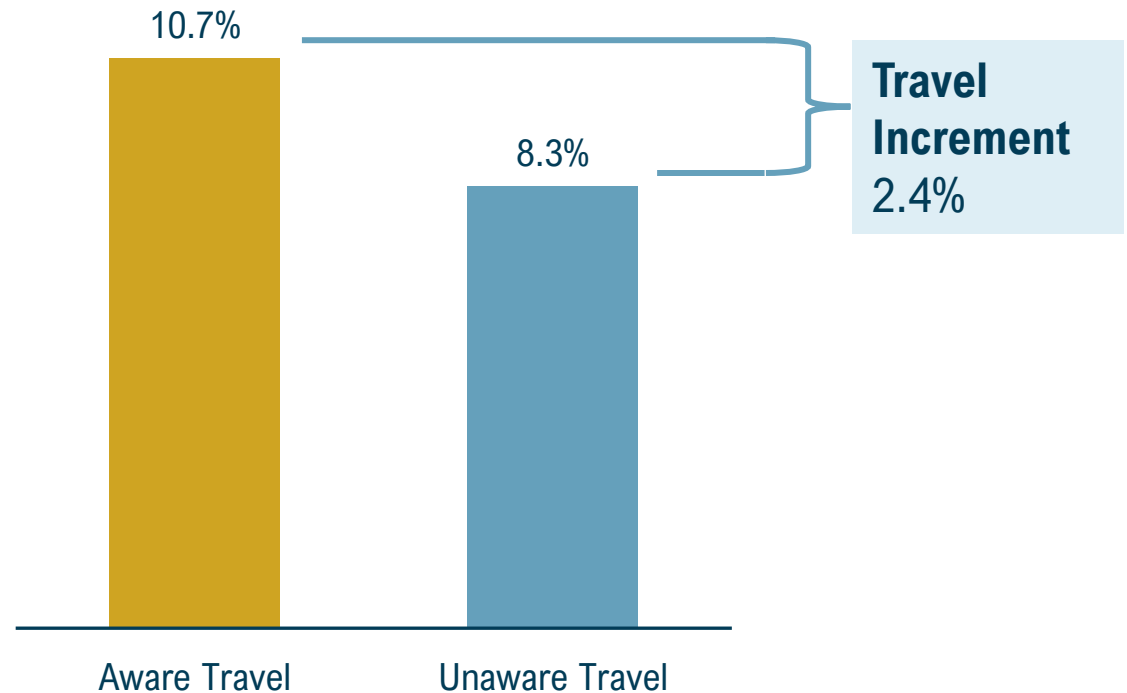


Incremental Travel

The campaign generated a travel increment of 2.4%.

- 10.7% of ad-aware consumers traveled to Washington State from September 2022 through March 2023, compared to 8.3% of unaware consumers.
- Keep in mind, the campaign will continue to influence future trips.

Travel to the State of Washington
September 2022 - March 2023



Trip Specifics



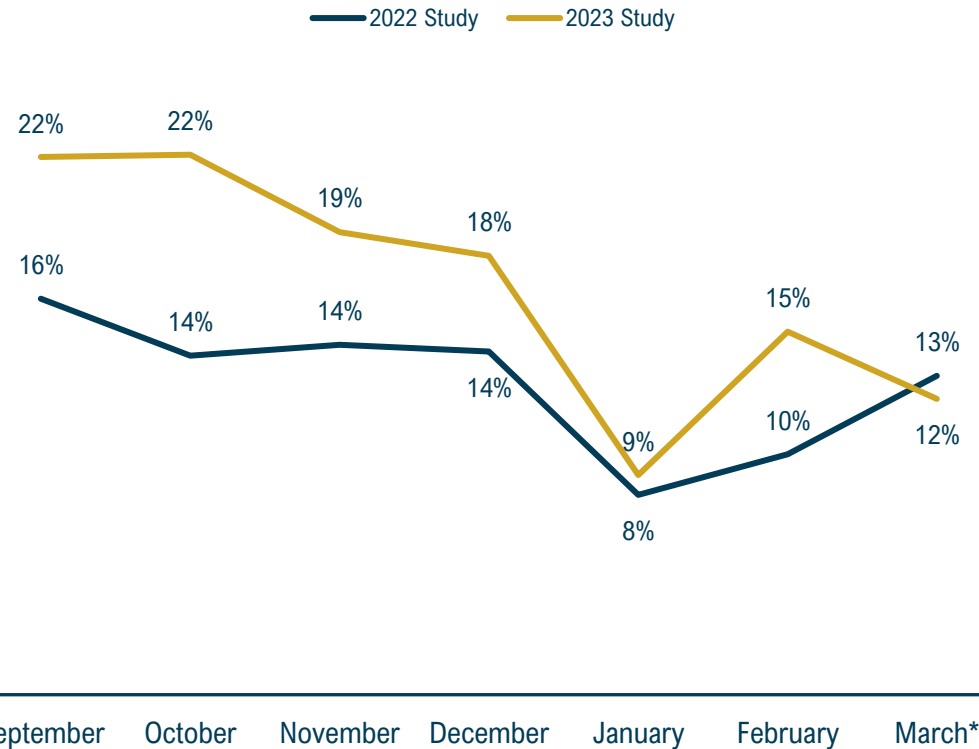
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Trip Timeline

Year-over-year travel rates are improving.

- When examining the travel window from 2022 and 2023, more people in the target markets traveled.

Visitation Rate by Year



*March 2023 excludes travel that occurred after surveys were collected.

Ad Impact Trip Specifics

Ad-aware consumers stay longer, are more likely to travel with children, spend more, stay in paid lodging, and are more likely to fly.

- The advertising promoted family travel and resulted in a greater proportion trips with children and stays with family.
- Ad-aware consumers spent more during their trip. Aware and unaware consumers spend roughly the same amount per person, per day, suggesting the great spending is a result of longer stays.
- The campaign prompted more air travel as noted by the quarter of aware consumers who traveled to Washington via airplane.

Trip Specifics	Unaware Trips	Aware Trips
Nights in Washington State	1.9	2.9
People in Travel Party	1.4	1.6
Kids on Trip	13%	21%
First Trip to Washington State	12%	21%
Overall Average Trip Spending	\$825	\$1,246
Per Person per Day Spending	\$206	\$199
Lodging (% that stayed at least one night on the trip)		
Paid Lodging (ex. Hotel, motel, bed & breakfast)	46%	57%
With Family/Family	30%	32%
Homesharing/Vacation Rental (ex. Airbnb, VRBO)	5%	12%
RV Park/Campground	4%	6%
Condominium or Timeshare	2%	4%
Transportation		
Drove via car, van, truck, or SUV	81%	76%
Drove via RV	2%	3%
Flew into Washington State or a nearby state	16%	24%
Bus or motor coach trip	3%	3%
Motorcycle	1%	0%
Train*	2%	2%

*Train travel was the only form of transportation mentioned in the other, specify question.

Ad Impact Trip Spending

Ad-aware visitors spent \$1,246 during their trip in the State of Washington.

- Aware consumers spent \$421 more than their unaware counterparts.
- Lodging and entertainment/attractions spending contributed the most to the trip expenditure difference.

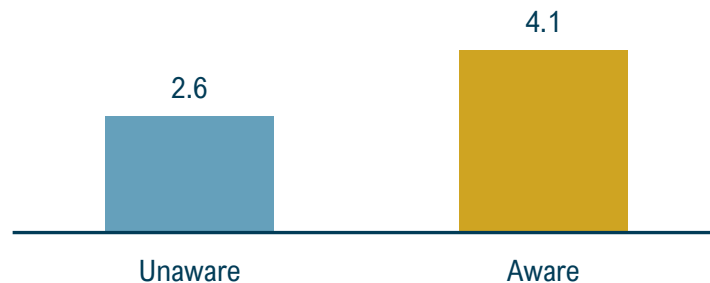
Spending Category	Unaware Trips	Aware Trips
Lodging, accommodations	\$317	\$444
Meals, food, groceries	\$178	\$256
Entertainment, attractions	\$58	\$172
Shopping	\$179	\$237
Entertainment such as shows, theater or concerts	\$46	\$52
Transportation while <i>in</i> Washington	\$49	\$85
Total Trip Spend	\$825	\$1,246

Ad Impact Trip Activities

Aware visitors were more inclined to do a wide variety of activities including taking scenic drives, visiting parks, and sightseeing tours.

- The top activities among all consumers include shopping, scenic drives, and visiting state/national parks.
- Aware consumers participated in 1.5 more activities than their unaware counterparts.

Average Number of Trip Activities



Activity Participation Rate	Unaware Trips	Aware Trips
Shopping	50%	56%
Scenic drive	31%	39%
Visiting a state or national park	17%	30%
Sought out food the area is known for (apples, oysters, etc.)	20%	28%
Sightseeing tour	13%	25%
Visiting historical sites	9%	24%
Hiking or backpacking	17%	18%
Aquarium/indoor family attraction	1%	18%
Visiting a waterfall	6%	18%
Visiting museums	11%	17%
Visiting breweries or distilleries	15%	16%
Wildlife/bird watching	5%	13%
Zoo or wildlife refuge	2%	12%
Visiting Native American sites	2%	11%
Gambling	11%	10%
Attending performing arts (music/theater)	6%	10%
Farm tour/Farmer's market	6%	9%
Attending a festival or fair	3%	9%
Visited a winery/wineries	9%	8%
Golfing	2%	7%
Camping	5%	7%
Bicycling or mountain biking	1%	4%
Snow sports	2%	4%
Canoeing/kayaking/river rafting	2%	4%
Mountain/rock climbing	1%	3%
Horseback riding	1%	2%
Other	16%	8%

Motivating Trip Activities

Aware visitors are motivated by scenic drives, shopping, and visiting parks.

- The table illustrates which activities motivated trips to Washington State the most. The list is sorted by motivation (participation rate multiplied by the motivation rate).
- Scenic drives, parks, and sightseeing tours motivated visitation to a higher degree among aware consumers.
- Activities that appear lower on the list but with high motivation rates are niche attractions.

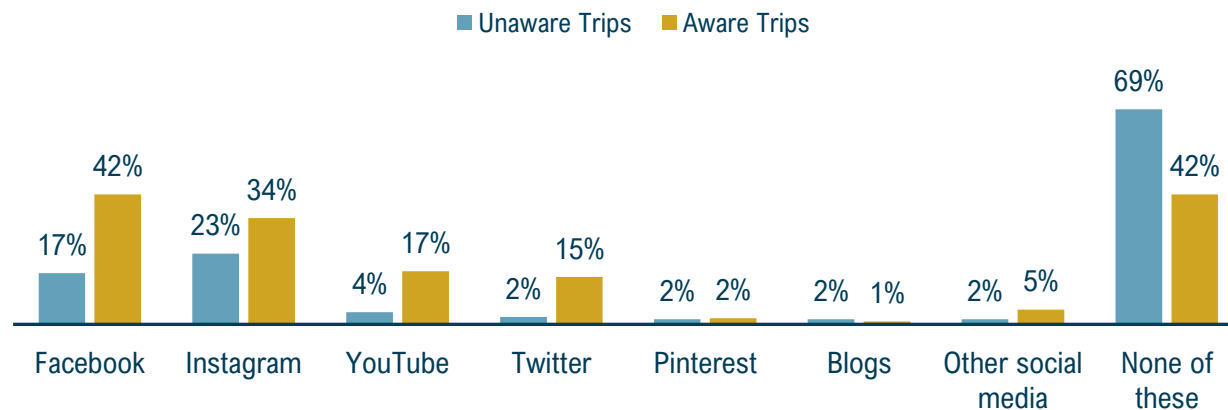
Net Motivation	Unaware Trips	Aware Trips
Scenic drive	12%	24%
Shopping	23%	22%
Visiting a state or national park	8%	18%
Sightseeing tour	9%	17%
Sought out food the area is known for (apples, oysters, etc.)	6%	10%
Hiking or backpacking	10%	8%
Visiting museums	5%	5%
Visiting breweries or distilleries	5%	3%

Sharing Trip Experiences

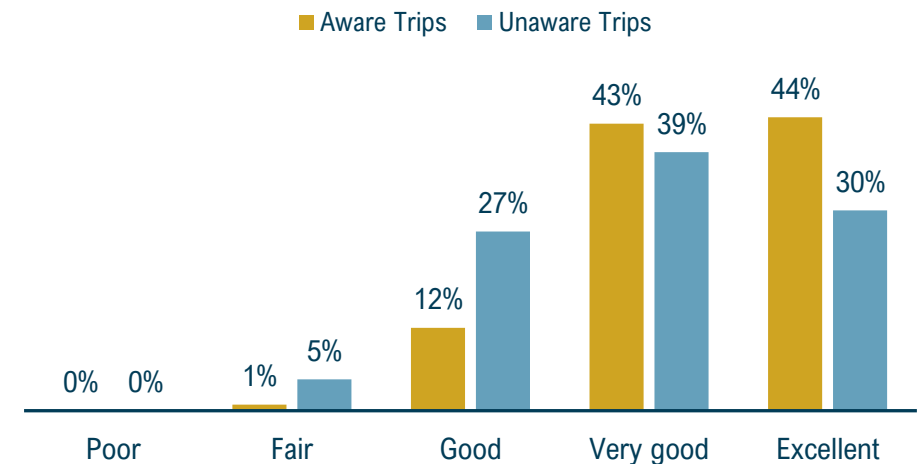
Aware consumers are more likely to post information about their trip online and give higher trip ratings overall.

- 42% of aware consumers posted about their trip on Facebook, and 34% on Instagram. 69% of unaware consumers did not post about their trip on any outlet.
- Aware consumers also give higher ratings for their trips to Washington. 87% of aware visitors rated their trip as very good or excellent, compared to 69% among unaware visitors.

Did you post any information about this trip on the following outlets?



Washington State Trip Rating

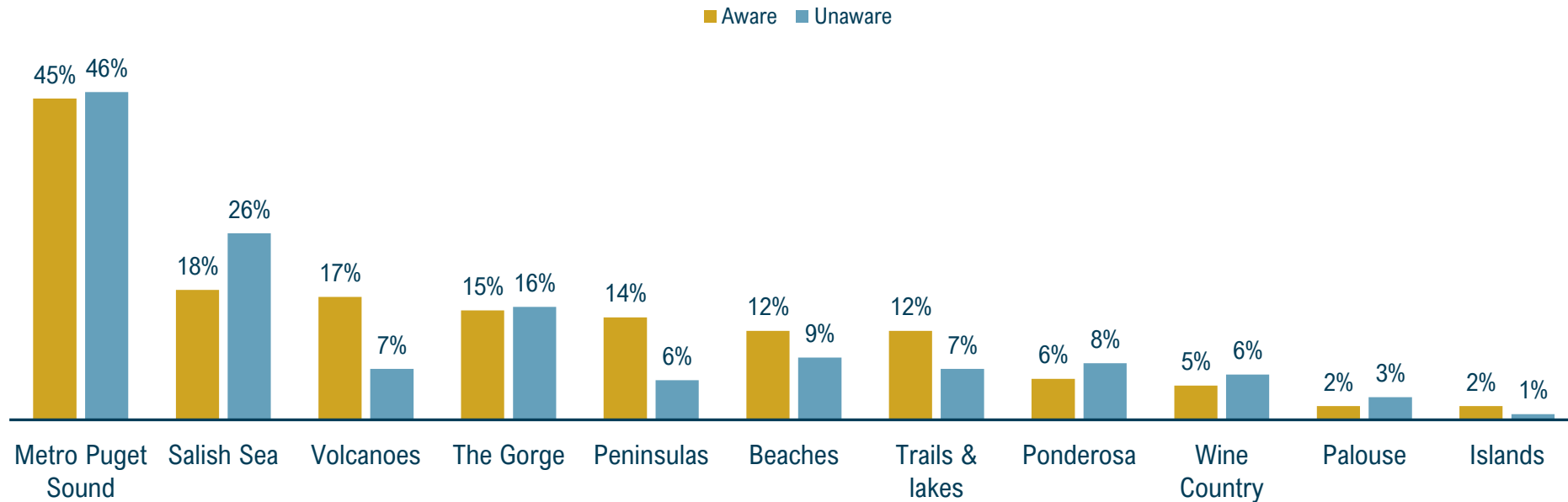


Regional Visitation

Just under half of all visitors explored the Metro Puget Sound region.

- The Volcanoes, Peninsulas, Beaches, and Trails & Lakes regions were visited at a higher rate by aware consumers.

Washington Regions Visited



Region Visitation Overlap

Visitors to the Metro Puget Sound also visited the Peninsulas, Salish Sea, the Volcanoes, and Trails & Lakes regions.

		Percentage of visitors to these regions...										
		Peninsulas	Islands	Beaches	Salish Sea	Metro Puget Sound	Volcanoes	The Gorge	Trails & lakes	Wine Country	Ponderosa	Palouse
...also visited these regions	Peninsulas		0%	21%	4%	7%	19%	0%	9%	8%	0%	0%
	Islands	0%		4%	4%	0%	4%	0%	5%	0%	0%	0%
	Beaches	23%	33%		4%	2%	26%	11%	9%	8%	0%	0%
	Salish Sea	9%	67%	8%		20%	19%	8%	23%	23%	6%	0%
	Metro Puget Sound	32%	0%	8%	40%		41%	17%	59%	23%	6%	0%
	Volcanoes	23%	33%	29%	10%	10%		19%	23%	8%	6%	0%
	The Gorge	0%	0%	17%	6%	6%	26%		9%	23%	6%	17%
	Trails & lakes	9%	33%	8%	10%	12%	19%	6%		15%	6%	0%
	Wine Country	5%	0%	4%	6%	3%	4%	8%	9%		0%	17%
	Ponderosa	0%	0%	0%	2%	1%	4%	3%	5%	0%		17%
	Palouse	0%	0%	0%	0%	0%	0%	3%	0%	8%	6%	