

H2R Market Research

Reveal Your Customer's Full Experience

Ozarks Area 2019 Brand Perception Research

Delivered March 2019

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Methodology

TARGET AUDIENCE

The Ozarks Brand Perception Research was conducted among a professionally managed panel of travelers living in select In-State (AR and MO), Primary (OK, KS, NE, IA, IL, TN and KY), Secondary (MS, LA, TX, MN, WI, IN) and Tertiary (MI, OH, CO, AL, GA) Markets. Respondents were screened to ensure they were leisure travelers and household decision makers regarding travel. Throughout the report, this audience is referred to as *Area Travelers*.

SAMPLE

A total of 1,200 travelers were interviewed for this study, providing a maximum margin of error of +/-2.8% at a 95% confidence interval. This includes 200 for the In-State Markets, 400 in the Primary Markets, 400 in the Secondary Markets and 200 in the Tertiary Markets.

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Executive Summary

Project Overview

The purpose of conducting the Ozarks Brand Perception Research was to explore how the Ozarks Region is perceived across the marketplace, what travelers perceive the boundaries of the region to be and how Visitors compare to Non-Visitors.

The insights from this research should give area decision makers a better understanding of the Ozarks and individual destinations' brand health and perception among the target audience.

Throughout the report, Ozarks' Brand Metrics are compared to the Competitive Set's Average, as well as H2R Proprietary Industry Norms (H2R Norms) where applicable.



Ozarks More Region Than Destination

- The Ozarks has a healthy level of aided brand awareness among target travelers (89%), considerably stronger than H2R's Proprietary Industry Norm of 84%. This level of brand awareness ranks third place among this same audience behind the Rocky Mountains (95%) and Smoky Mountains (93%). The Appalachians have awareness on par with the Ozarks (89%) while the Poconos' awareness runs significantly* lower (78%).
- Even though familiarity with the Ozarks runs high, this does not necessarily translate into top-of-mind awareness. That is, top-of-mind consideration of the Ozarks as a travel destination was mentioned in only 0.1% of responses for unaided destinations travelers enjoy visiting. The top destinations mentioned included Chicago, Branson, Kansas City and St. Louis. Thus, it appears that the Ozarks is considered more of a region on a map, than a destination to consider visiting—not unlike some states.
- Still, the Ozarks has healthy raw market potential among those who have visited or considered visiting the area (69%). This potential is fueled primarily by Past Visitors, as the consideration pool (25%) ranks last among competitive regions evaluated in this study.



Strong Upside Driven by Past Visitors

- Having comparatively strong raw market potential is one thing, but converting and retaining that potential is another. Thanks in part to its location at the center of the sample's trade area, the Ozarks has converted nearly one-quarter of its potential in the past two years. Likewise, it retained 36% of its past visitors. This is the highest level of conversion and retention of all destinations evaluated among the Competitive Set by at least four points.
- There also appears to be comparatively good potential for future growth. That is, the Ozarks' raw market potential is more than four times the level of its recent visitation resulting in an index of 427 and is on par with the H2R Norm of 433. This is likely due to the expansive reach of the Ozarks' overarching size and coverage.
- However, the Competitive Set as a whole averages a Visitor Growth Index (VGI) of 848 which is nearly double that of the Ozarks'.



Strong Conversion & Retention Levels

- Interestingly, the Ozarks as a region earns a much stronger level of favorable opinion (68%) than both the H2R Norm (60%) and the average among individual area Ozarks destinations measured (56%). Ozarks destinations in Missouri earned a 65% top 2 box for favorable opinion while those in Arkansas averaged 51%.
- Among individual Ozarks destinations, travelers are most familiar with Branson (81%), Springfield (68%) and Lake of the Ozarks (65%). But, no one Ozarks destination generated the same level of aided brand awareness as the Ozarks Region in general (89%).
- Raw market potential for individual destinations was healthiest for Branson (61%), Lake of the Ozarks (48%) and Springfield (44%). However it is Rogers (23%), Springfield (23%) and Bentonville (22%) that have earned the highest levels of conversion among their respective levels of raw market potential. Furthermore, Rogers (37%), Bentonville (35%), Branson (33%) and Fayetteville (33%) earned the highest levels of visitor retention.



Ozarks Perceived as Outdoors, Water

- Intent to visit Missouri destinations scored an average of 27% top 2 box and Arkansas destinations averaged 22%. While these levels are lower than the H2R Norm (34%), not all is lost. Younger travelers are significantly more likely to visit the area (45% among 18-34 year olds). However, it has been older travelers (55+) who were most likely to visit the area in the past.
- Area travelers most associate terms such as mountains (18%), scenery (16%) and lakes (15%) with the Ozarks. Those familiar with the Ozarks mentioned many destinations (unaided) that they believe are in the Ozarks which included Missouri (31%), Branson (18%) and Arkansas (18%).
- The results of this study also revealed that the physical definition of the Ozarks is not very well understood. That is, travelers believe that Lake of the Ozarks (75%), Branson (66%), Eureka Springs (46%), Bentonville (36%) and Springfield (35%) are in the Ozarks. And, they were mostly unsure about the Buffalo National River, Mountain Home, Mountain View, Fayetteville, Poplar Bluff, Rogers, Harrison, Fort Smith, West Plains and Columbia. In fact, the only places that travelers were decidedly sure are *not* part of the Ozarks are Oklahoma City, Memphis, Tulsa, Topeka, Wichita, St. Louis, Kansas City and Pittsburg, KS.



Ozarks' Strengths & Weaknesses

- Travelers indicated they are most likely to seek out destinations known for providing good value (89%), safety (89%), having a clean/healthy environment (86%) and having a variety of quality lodging accommodations (81%). Those most familiar with the Ozarks describe the area by its outdoor activities (73%), water/lake activities (69%) and relaxing atmosphere (68%).
- As a result, the Ozarks' strengths (or those attributes that best describe the Ozarks and are considered of above average importance) include being a good value, a place with new events/attractions/activities, outdoor activities, a variety of shopping options and festivals that are appealing.
- An area that could better meet travelers' needs is providing a variety of quality lodging accommodations to choose from.



Ozarks Ideal for Reconnecting

- Area travelers most enjoy visiting historic sites/landmarks when traveling for leisure (65%), yet only 22% have visited historic sites while in the area, an indication that awareness may be lower than preferred. Other general activities travelers enjoy include visiting local restaurants (63%) and sightseeing (51%).
- The most popular activities visitors enjoy in the Ozarks include dining, shopping and visiting family attractions. However, it is live performances, local dining and shopping that are most likely to cause travelers to visit. More important than these functional activities, however, are the emotional reasons or motivations most visitors have for traveling to the Ozarks. Those motivators most likely to inspire visits to the Ozarks include the opportunity to reconnect with friends and loved ones, escape everyday life and visit a unique place that is out of the ordinary.
- Most Ozarks' travelers visit the area on a vacation or weekend getaway. Most spend the night on their trip to the Ozarks (82% in Missouri destinations and 74% in Arkansas destinations) and stay three nights during their trip.



Viewers See Ozarks More Favorably

- The media sources that Ozarks visitors are most likely to use to plan their trips include online searches (62%), friends and family (60%) and websites of specific attractions, restaurants, hotels, etc. (53%). Most of these media could be classified as “pull” media sources—meaning consumers take the initiative to seek it out rather than having it pushed to them in the form of television ads (12%), magazine ads (9%), direct mail (8%), etc.
- Another interesting piece of media is the Netflix Original Series *Ozark*. Only about half of area travelers are familiar with the series. However, those who have recently visited Missouri or Arkansas are much more likely to be familiar with it and much more likely to have watched the TV show.
- Despite the fact that the show doesn’t portray the Ozarks in the most positive light, those who have watched the show have a higher positive opinion of the area (and its individual destinations) than those who haven’t seen the show.



Barriers to Patronage

- Stated barriers for not visiting the Ozarks included competition/preferences for other destinations (67%), the Ozarks never comes to mind as a leisure destination (66%) and don't know enough about it to make an informed decision (60%).
- However, travelers often struggle to verbalize what really prevents them from visiting a destination, and as a result, Stated Barriers are often seen as excuses. To dig a bit deeper, each stated reason for not visiting was also correlated with the Prospects' previously recorded level of intent to visit. This process allows us to identify which barriers are really preventing travelers from wanting to visit the Ozarks.
- In this case, these "Derived Barriers," were remarkably similar. That is, competition/preference for visiting other destinations and a lack of top-of-mind awareness remained among the top barriers. However, a lack of interest in the Ozarks and no must sees compelling a visit also rose near the top.



Considerations

- **Work Together to Leverage Promoters.** The Ozarks appeals to a certain type of person, and Visitors to one Ozarks destination may be among the best Prospects for another. Consumers today are quick to post photographs, comments and stories about their favorite places to visit, and when that is a positive experience, it is often the lowest hanging fruit. The key is to reach out to these Brand Promoters and arm them with the insights, information, photos and behind the scenes information they need to share with their followers. Leveraging each others' Brand Promoters could bring new visitation to individual destinations while travelers are already in the area.
- **Emotional Connection.** Product variety is great, and the Ozarks area has many terrific functional activities for travelers to choose from. But, like most destinations, the biggest reasons for traveling tend to involve satisfying travelers' higher order emotional needs. For the Ozarks, the biggest emotional driver is reconnecting with friends and family and/or having a chance to disconnect from everyday life. Finding ways to tell travelers about the area's key functional drivers in a way that leverages these emotional connections may help reach new travelers and drive greater repeat visitation.
- **Gaining New Ground.** The Ozarks area isn't necessarily a top-of-mind travel destination like individual destinations and attractions within the Ozarks . So, in order to drive more visitation to the entire area, we recommend a two-fold approach:
 - **In-State and Primary Markets.** The Ozarks is more well-known and visited among those living closest to the area. Therefore, promoting key destinations or branded attractions rather than the general region in which they operate will continue to help drive visitation from these markets. Differentiating the area by marketing the individual destinations, activities and attractions available while using the splendor of the Ozarks to help accentuate the overarching brand image could drive some new visitation to the area from these markets.
 - **Secondary and Tertiary Markets.** The Ozarks and the destinations that comprise the region are much less known among those living farther away. Therefore, we recommend educating these travelers with motivation campaigns that feature the entire Ozarks area. Getting these travelers to consider the Ozarks is, of course, just the beginning. Once their interest is piqued, individual destination marketing will be required to "battle it out" online for conversion.

Considerations

- **Strategic Marketing Campaigns.** One caveat to marketing the individual destinations is that this may not work outside of the immediate region. Nationwide markets that aren't as familiar with the Ozarks may first need inspiration and familiarization with the Ozarks. Therefore, H2R recommends that the Ozarks area DMOs consider employing an integrated marketing strategy that features both a Motivation Campaign as well as an Activation Campaign.
 - A **Motivation Campaign** is designed to introduce the brand, grow brand awareness and reveal those attributes that most differentiate the area from the competition. Given the objectives, this means that more traditional types of mass media channels (e.g. billboards, brochures, television, radio, print, etc.) should be considered. This type of campaign would be geared more toward converting considers who have not visited yet and those unaware of Ozarks area destinations.
 - Conversely, an **Activation Campaign** is designed to reach Past Visitors and Interested Prospects (Considerers) who are already familiar with the brand and reignite interest in returning by providing information about specific product opportunities. These types of campaigns tend to use one-on-one marketing channels like digital campaigns, targeted social media, direct mail and such to deliver specific target messages to specific target markets.
- **Leverage the Netflix series, *Ozark*.** The Netflix Series *Ozark* has had an interesting impact on the Ozarks area. While the television show is meant to portray the area in a not-so-flattering light, area travelers who have watched the show have a more positive opinion and are more likely to visit the area. Therefore, we recommend that area DMOs embrace the show and leverage it to their advantage.
- **Tear Down that Wall.** The primary barriers preventing increased patronage to the area include a lack of new things to do, a lack of historic attractions and a perception that the area is hard to get to—even though it is centrally located to the target trade area. Therefore, we highly recommend marketing and (if possible) new product to break these perceived barriers to visitation. The more familiar people are with a destination, the more likely they are to pay attention to your marketing, develop an interest to visit that turns into desire and eventually a visit.

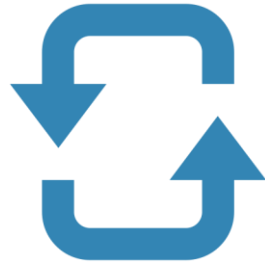
Ozarks Area Brand Health

01

BRAND HEALTH KPIs



89% of travelers are familiar with the Ozarks region



The Ozarks area converts **23%** of its market potential



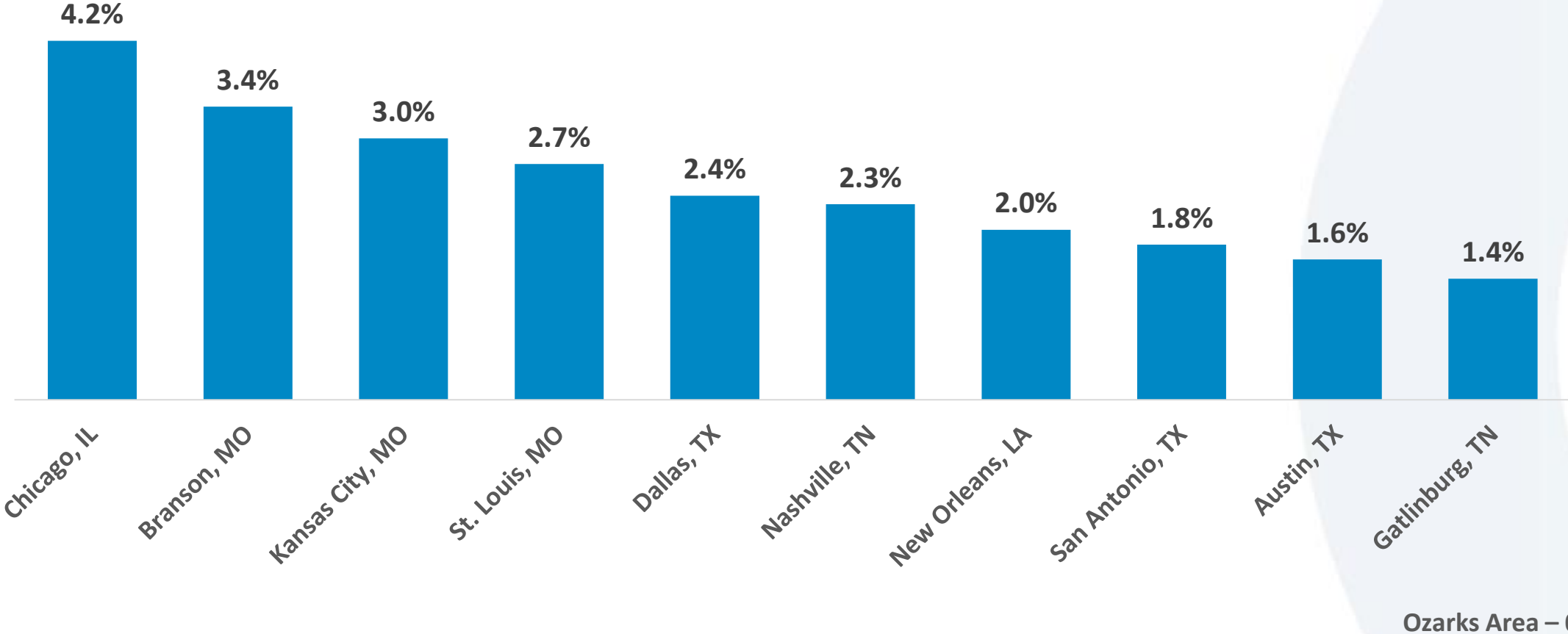
The Ozarks area retained **36%** of all Visitors in the past two years



68% of area travelers have a positive opinion of the Ozarks

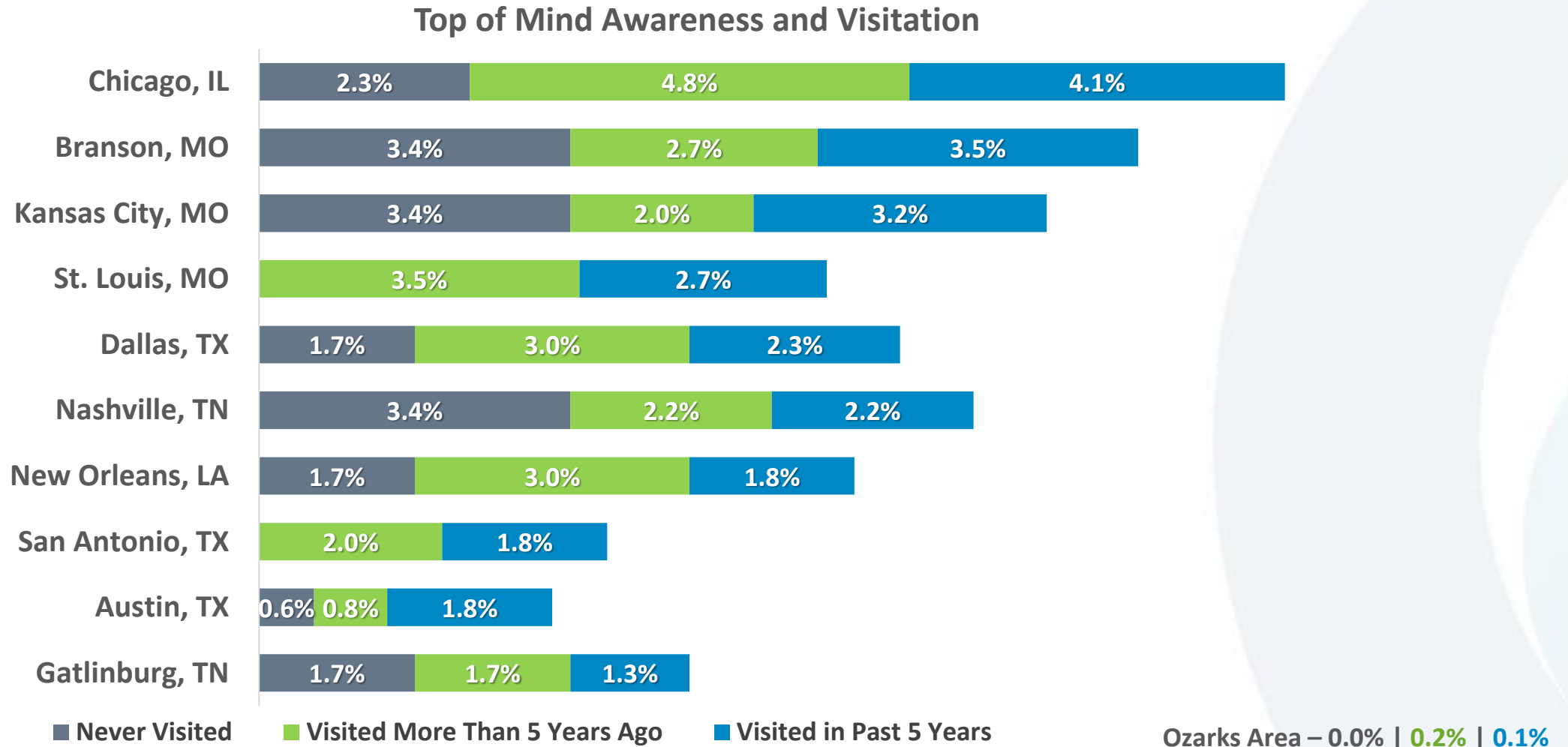
Top-of-mind destinations travelers enjoy visiting include Chicago, Branson, Kansas City, St. Louis and Dallas.

Top of Mind Destinations – Top 10 – Unaided



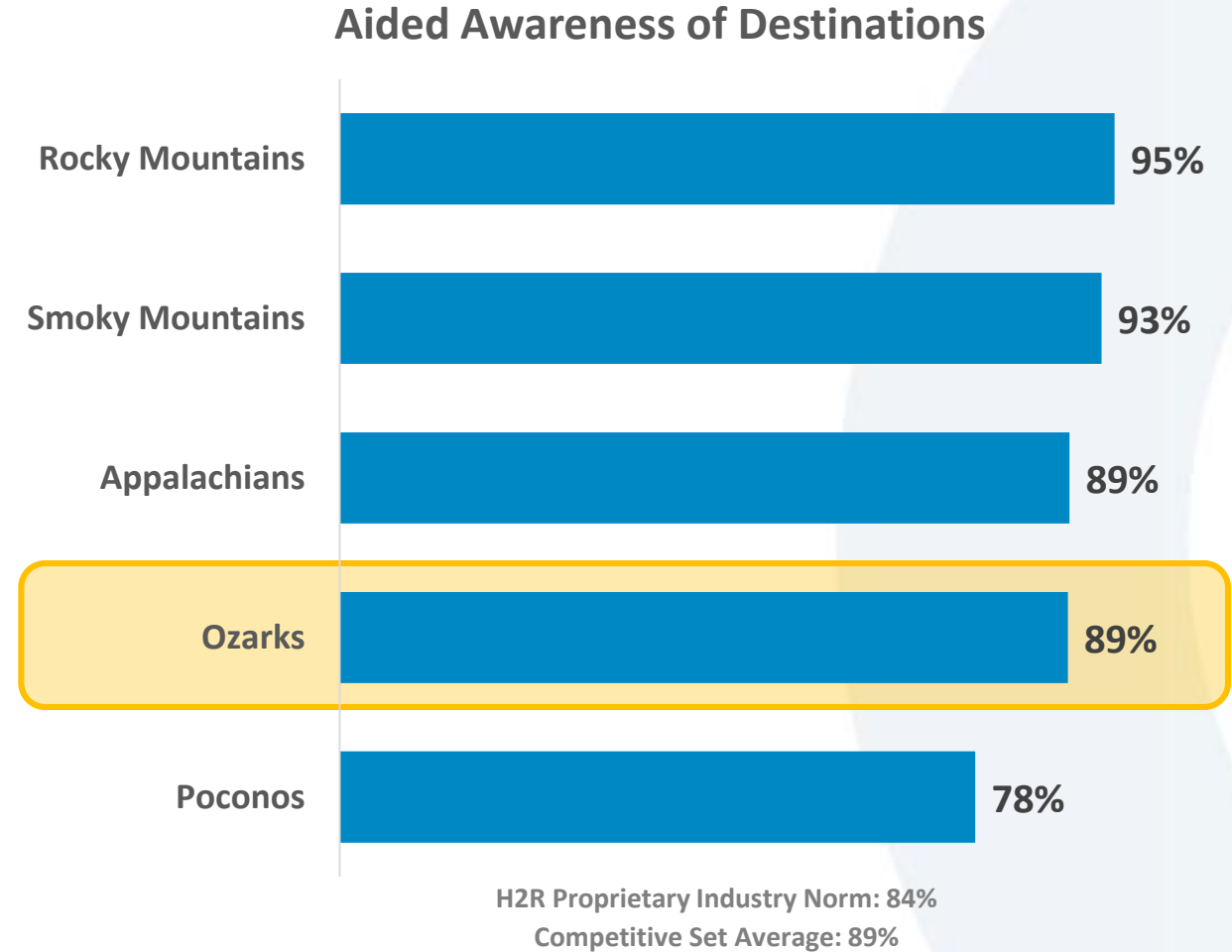
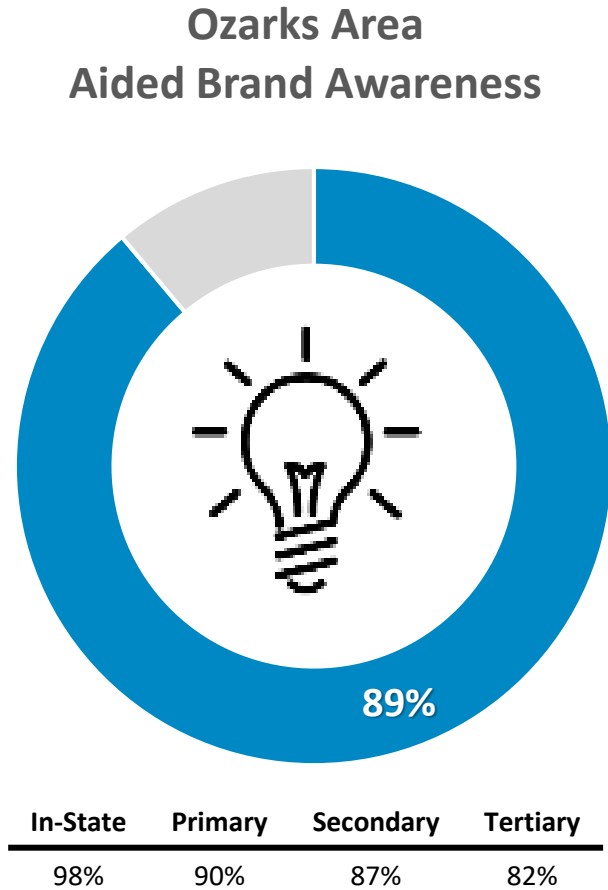
Q6: When you think of destinations within driving distance of your home that you enjoy visiting, which ones first come to mind? Please list at least 3 in order of preference.

All of the top of mind destinations mentioned have also been visited and are also the most popular.



Q7: When did you most recently visit each of the destinations you mentioned previously?

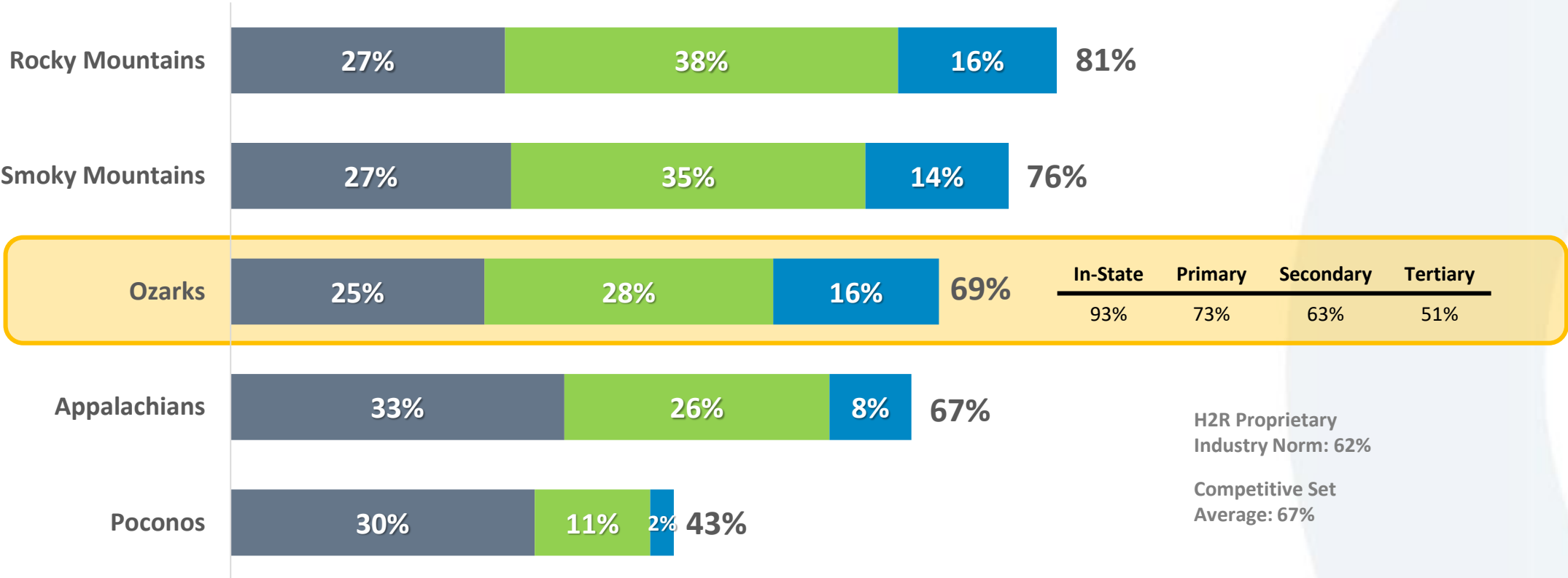
Nearly 9 in 10 travelers across the region are familiar with the Ozarks, ranking it on par with the Appalachians and significantly higher than the Poconos.



Q11: Please indicate your awareness and prior visitation of the following areas.
Please refer to page 2 for definitions of the In-State, Primary, Secondary and Tertiary Markets.

Raw market potential for the Ozarks ranks 3rd behind the Rocky Mountains and Smoky Mountains and is significantly higher than the H2R Norm.

Raw Market Potential*



H2R Proprietary
Industry Norm: 62%

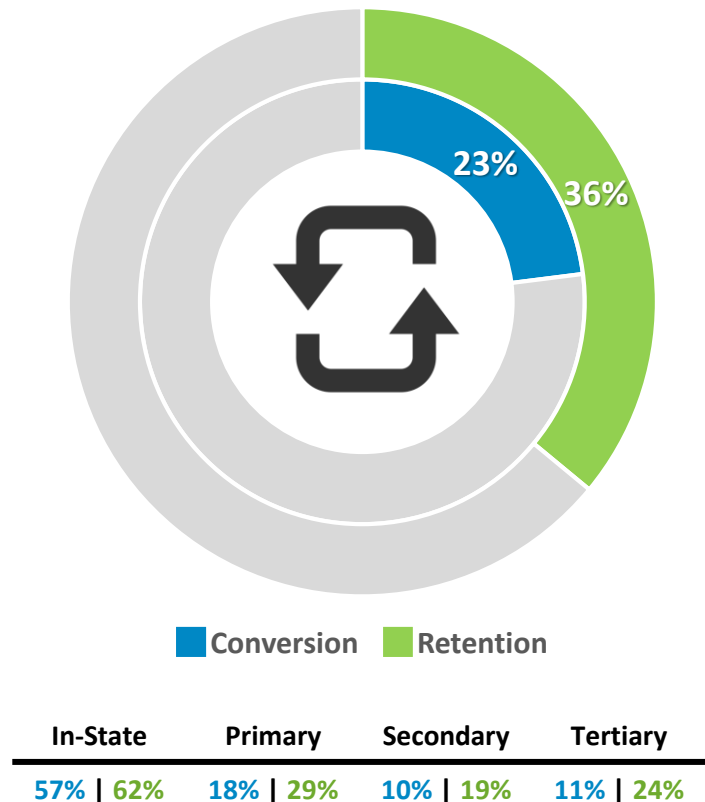
Competitive Set
Average: 67%

Considered visiting this destination, but never have
 Have visited this destination, but not in the past 24 months
 Have visited this destination in the past 24 months

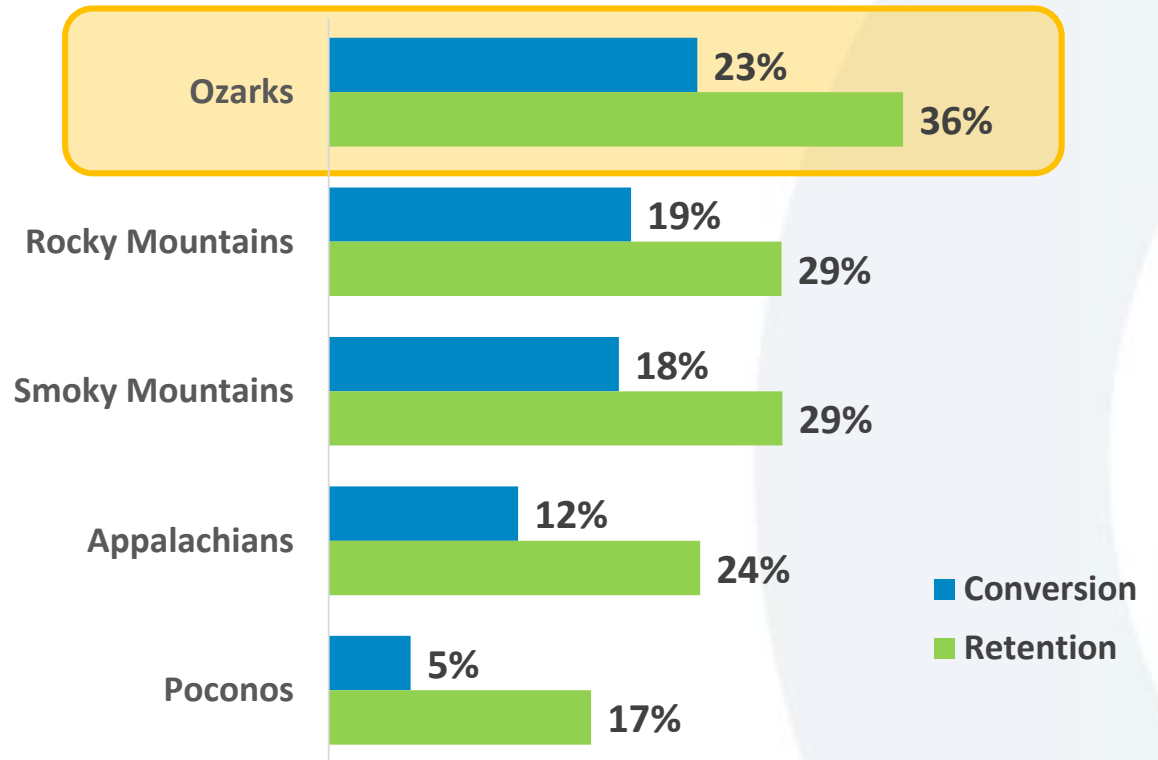
Q11: Please indicate your awareness and prior visitation of the following areas.
 *The methodology for calculating Market Potential can be found in the appendix of this report.

In the past two years, the Ozarks area has converted nearly one-quarter of its market potential and retained more than one-third of all Visitors — the highest in the Competitive Set.

Conversion & Retention of Market Potential*



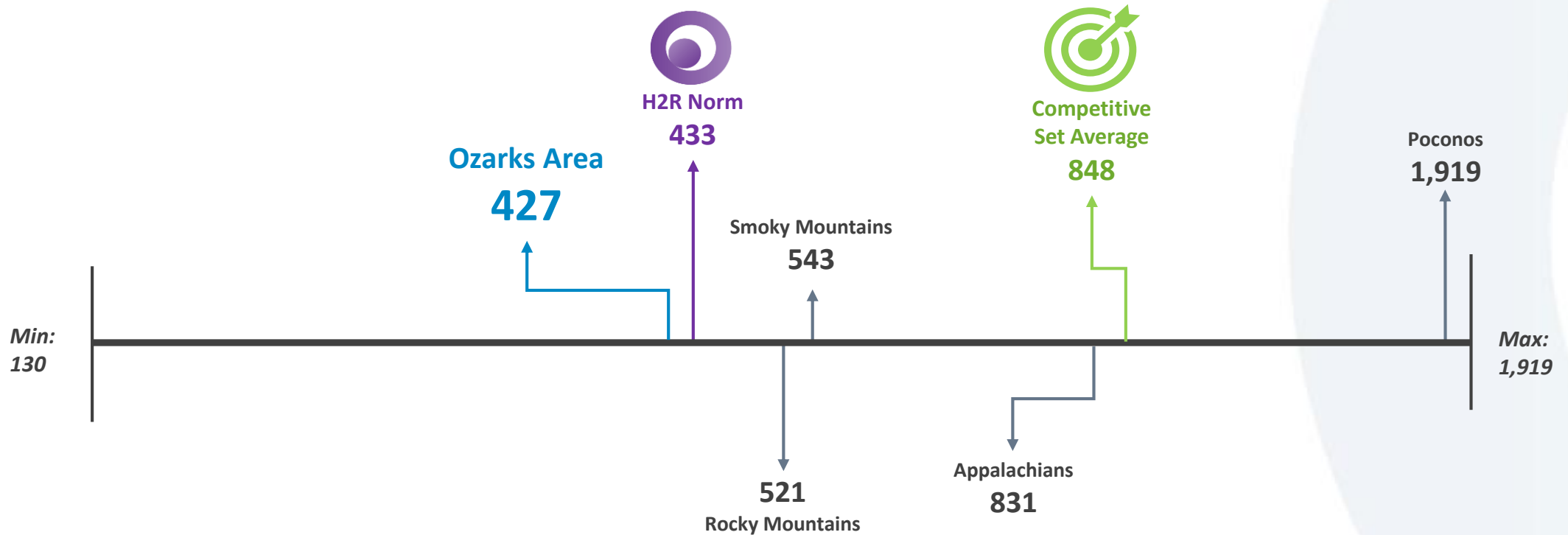
Conversion & Retention of Area Destinations



*Conversion Rate = % Recent Visitors / Market Potential
Retention = % Recent Visitors / % Visitors Ever

With a high conversion rate and comparatively small pool of Considerers, the Ozarks has comparatively low market upside relative to more distant locations such as the Poconos or Appalachians.

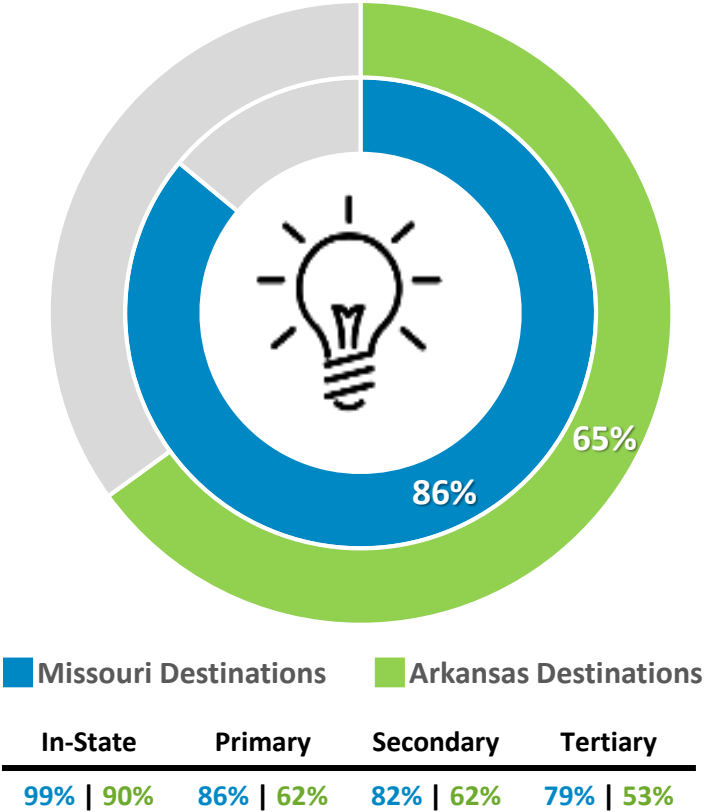
Visitor Growth Indicator (VGI)*



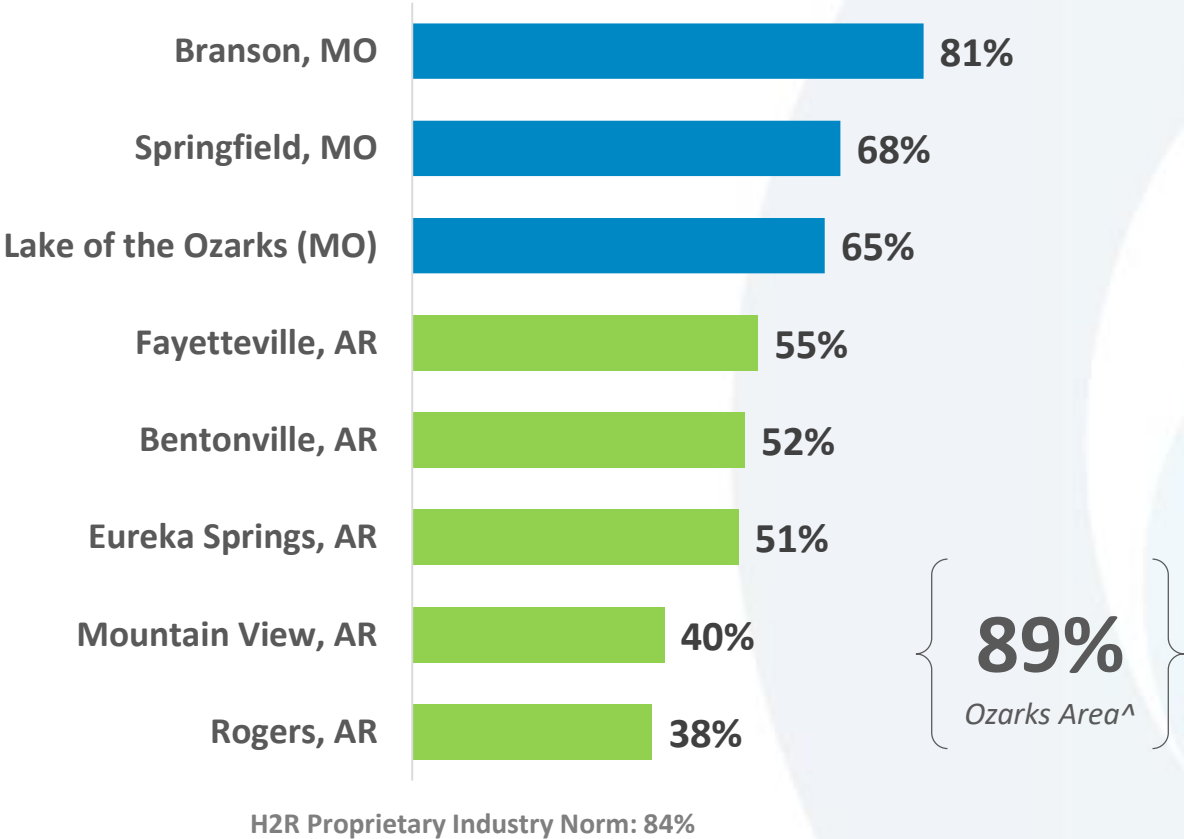
*VGI = Market Potential / % Recent Visitors * 100

Regional travelers are most familiar with Branson, Springfield and Lake of the Ozarks, but not nearly as familiar as they are with the Ozarks in general (89%).

Familiarity with Ozarks Destinations*

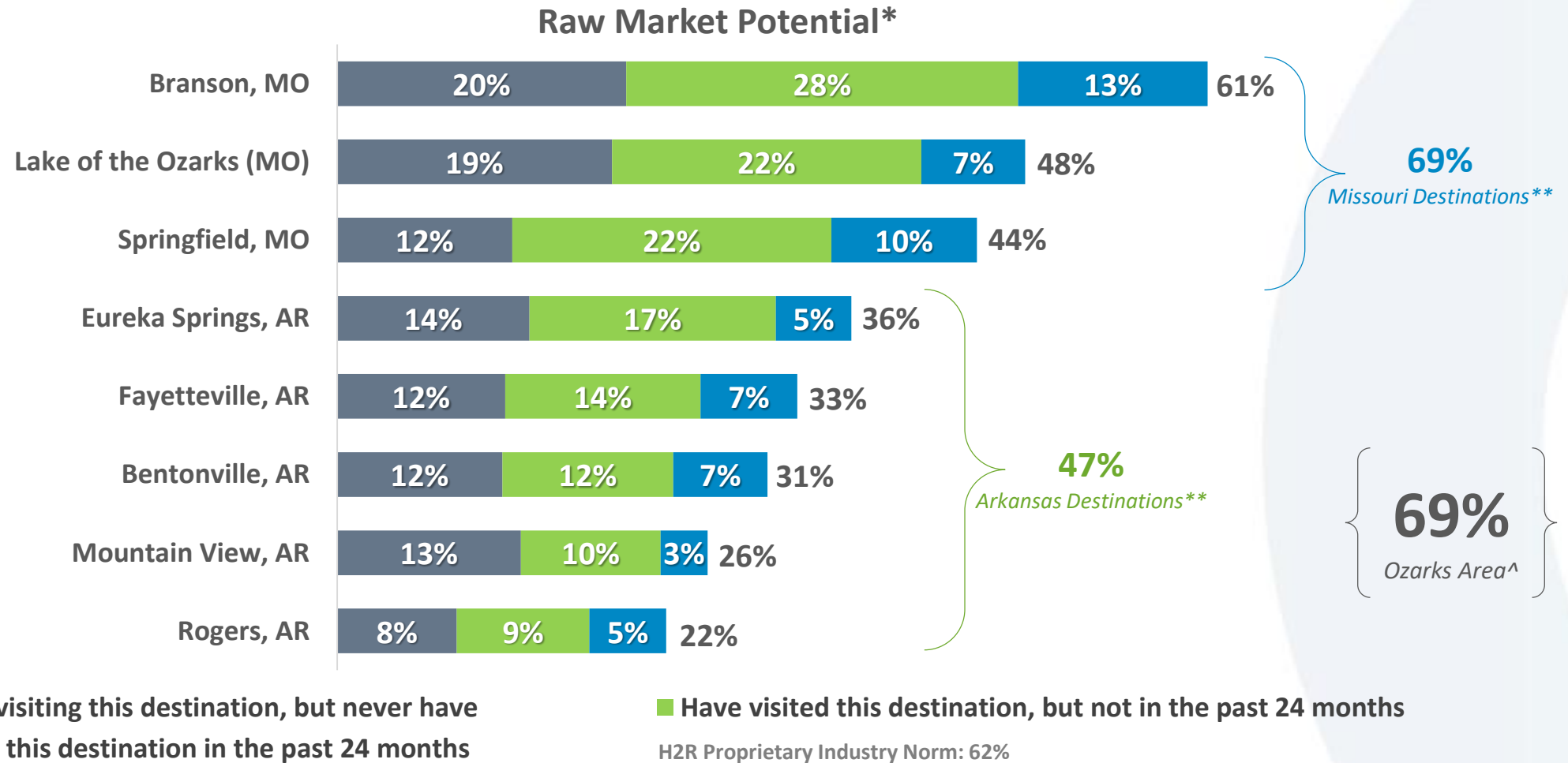


Familiarity with Ozarks Area Destinations



Q20: Please indicate your awareness and prior visitation of the following destinations.
 *Familiar with any MO or AR destination.
 ^Based on Q11: Please indicate your awareness and prior visitation of the following areas.

Branson, Lake of the Ozarks and Springfield exhibit the highest levels of raw market potential for the area.



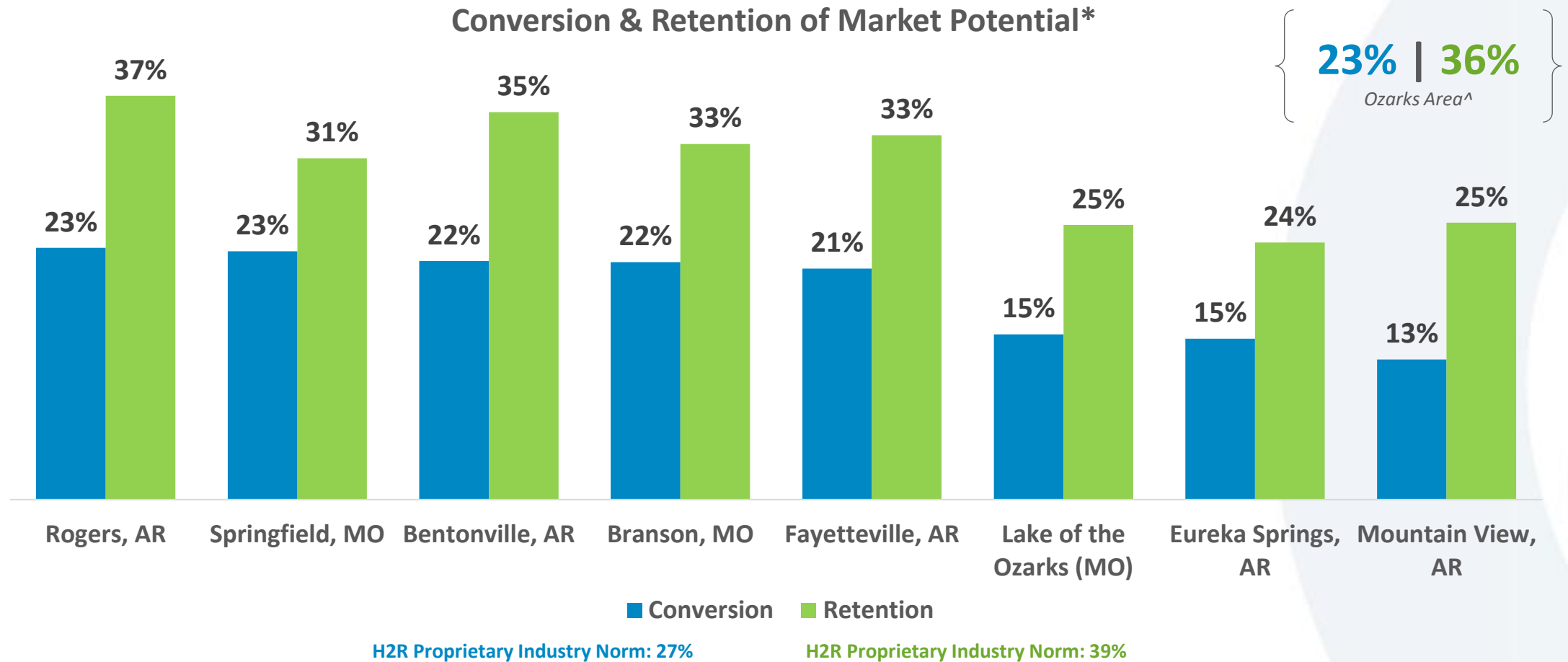
Q20: Please indicate your awareness and prior visitation of the following destinations.

*The methodology for calculating Market Potential can be found in the appendix of this report.

**Considered/Visited any MO or AR destination.

^Based on Q11: Please indicate your awareness and prior visitation of the following areas.

Rogers, Springfield and Bentonville do the best job converting visitors; while Rogers, Bentonville, Branson and Fayetteville retain visitors best.

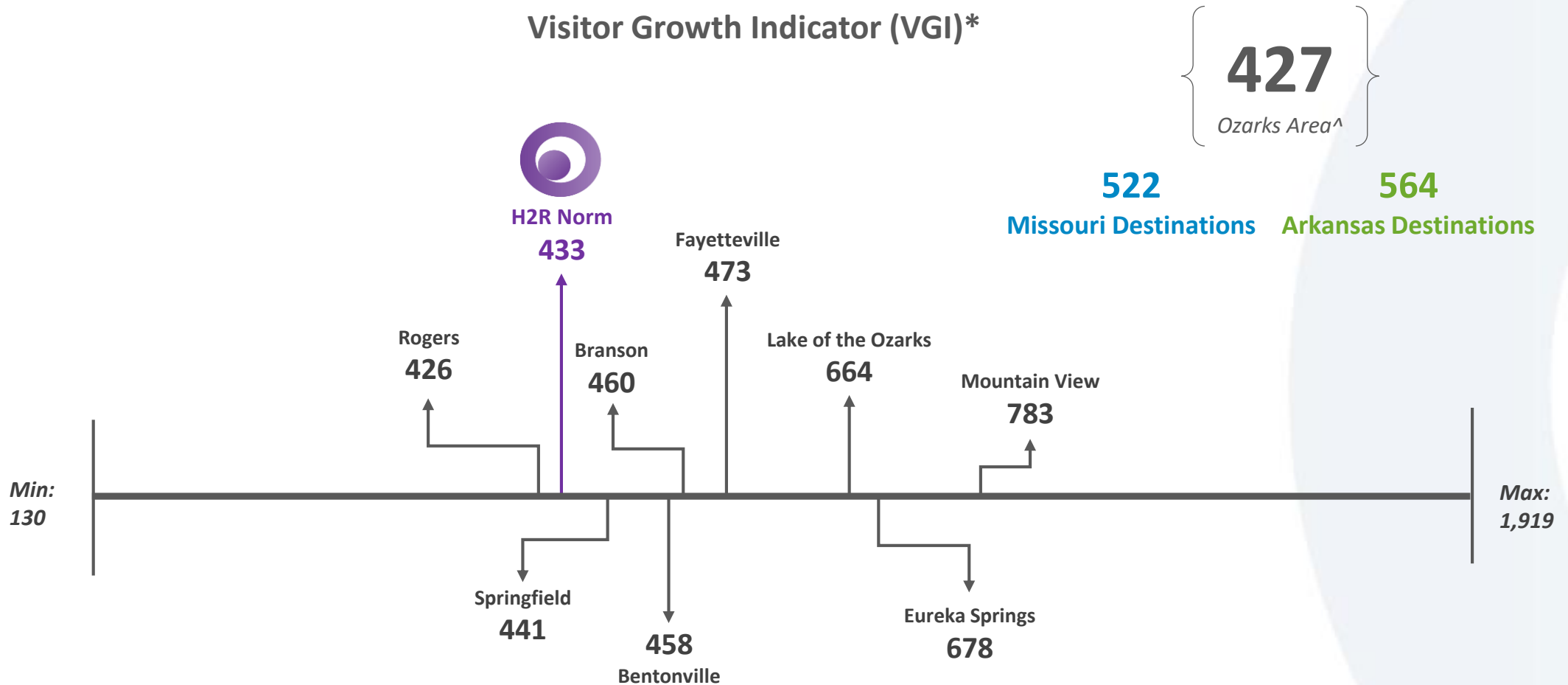


*Conversion Rate = % Recent Visitors / Market Potential

Retention = % Recent Visitors / % Visitors Ever

[^]Based on Q11: Please indicate your awareness and prior visitation of the following areas.

All of the area destinations evaluated have room to grow within their market potential – especially Mountain View, Eureka Springs and Lake of the Ozarks.

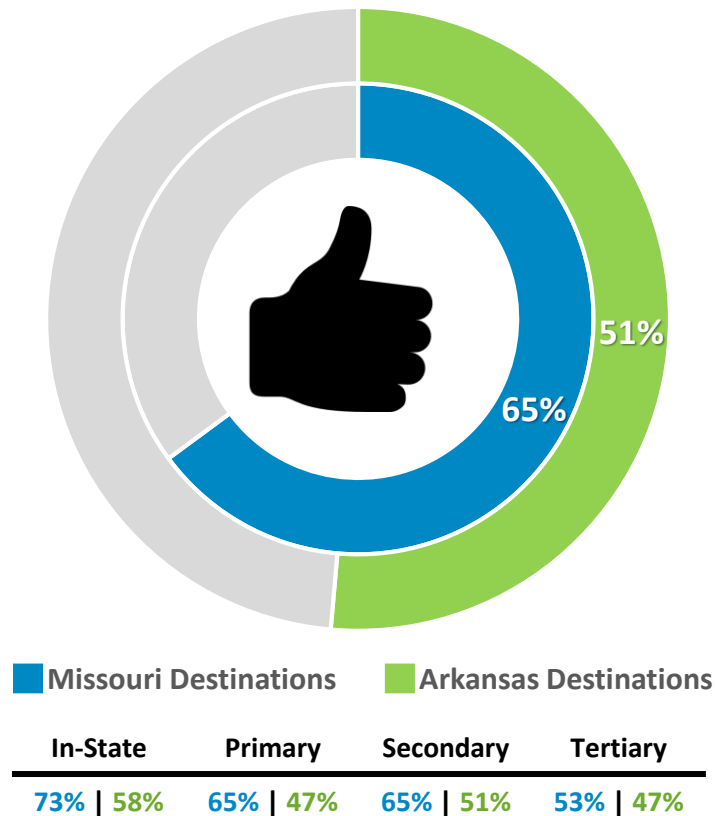


*VGI = Market Potential / % Recent Visitors * 100

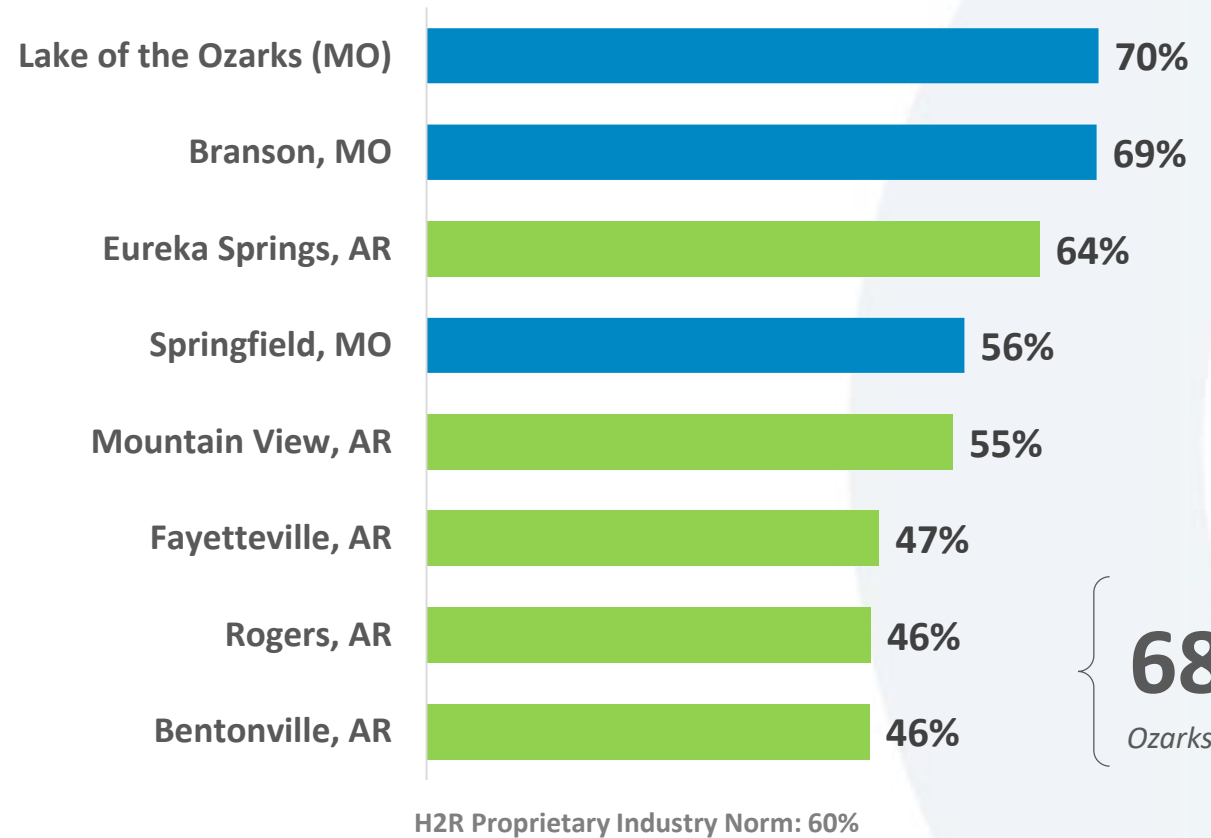
^Based on Q11: Please indicate your awareness and prior visitation of the following areas.

On average, 56% of travelers have a favorable opinion of area destinations in the Ozarks and Missouri destinations (65%) are viewed slightly more favorably than Arkansas destinations (51%).

Positive Opinion of Area Destinations



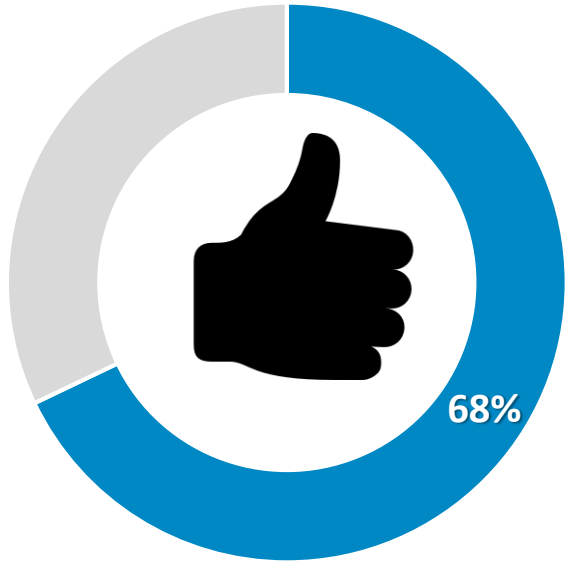
% Somewhat/Very Positive Opinion



Q21: Please indicate to what degree your opinion of the following destinations is positive or negative. (5-pt. scale)
 ^Based on Q11: Please indicate your awareness and prior visitation of the following areas.

The Ozarks as a whole has a more favorable opinion than most of the Ozarks destinations evaluated in this study.

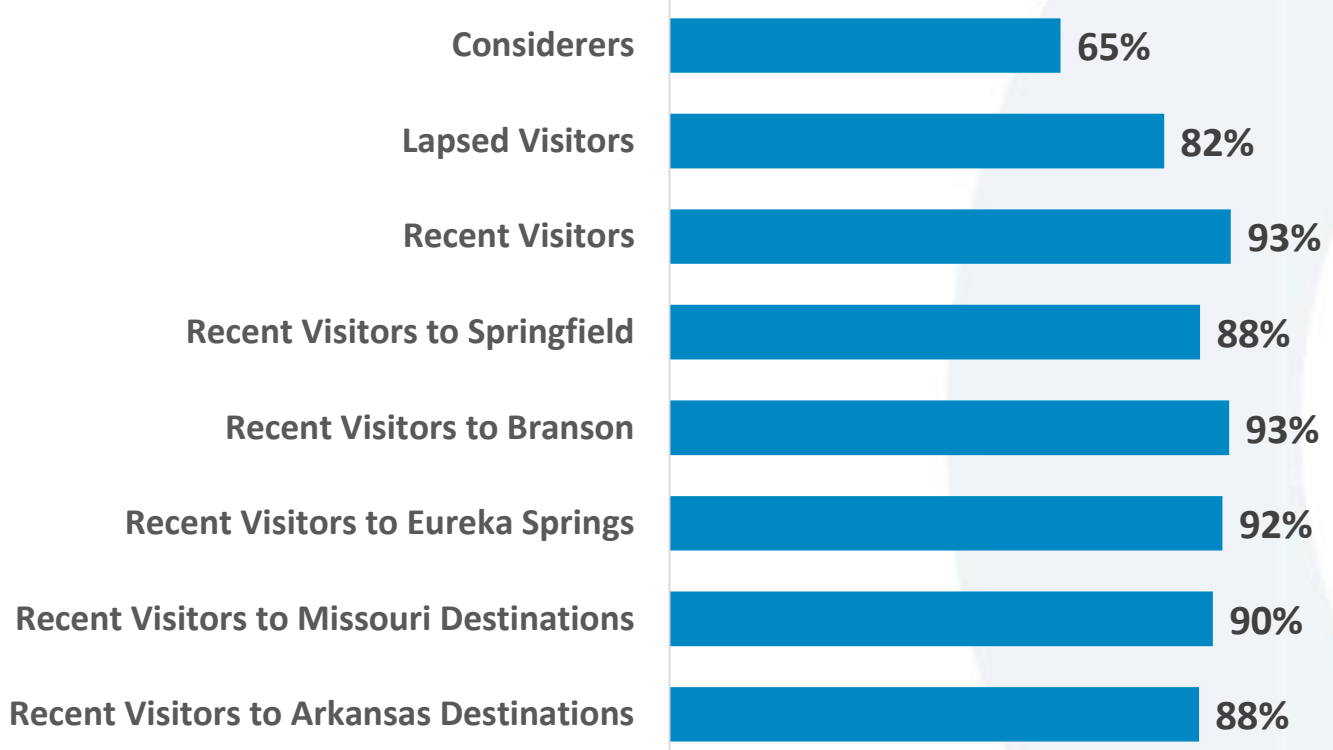
% Somewhat/Very Positive Opinion of the Ozarks



H2R Proprietary Industry Norm: 60%

In-State	Primary	Secondary	Tertiary
85%	72%	62%	52%

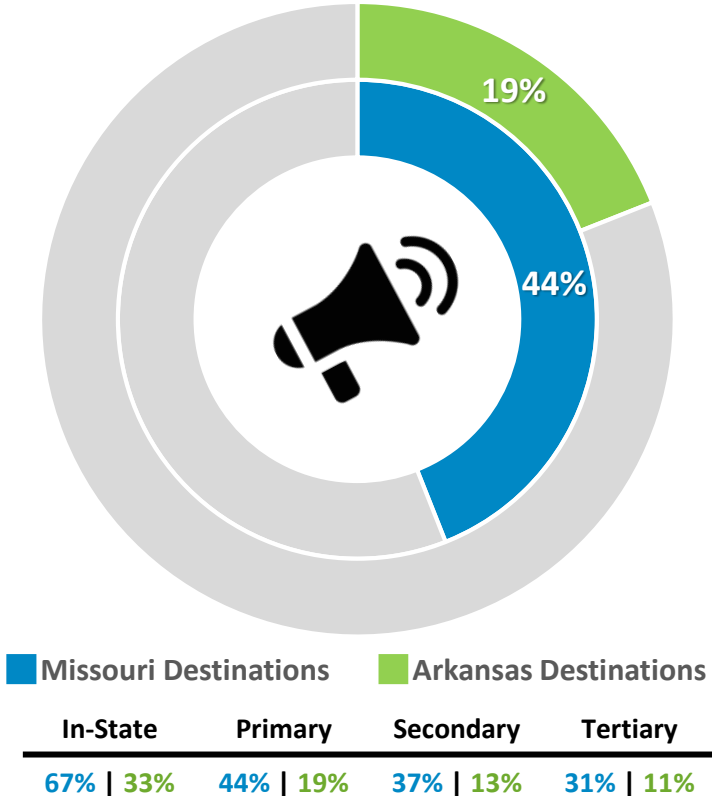
Positive Opinion of the Ozarks By Consumer Segment



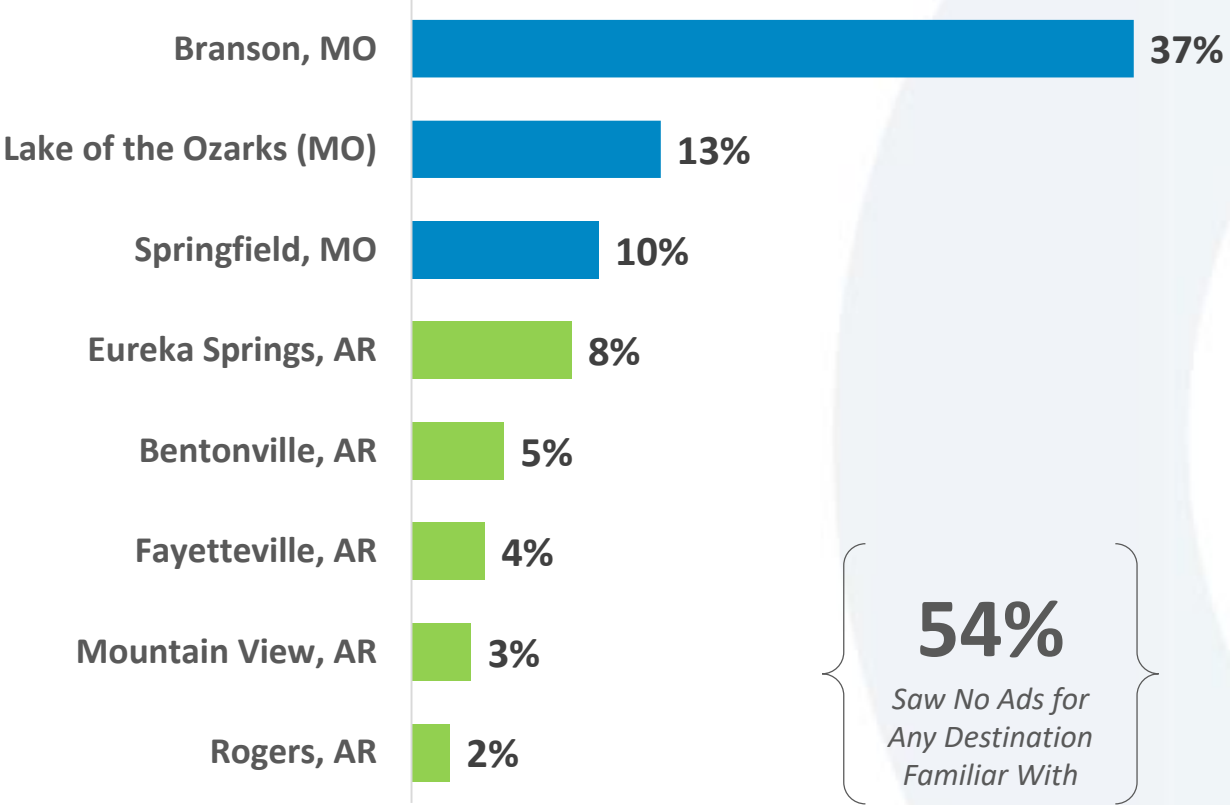
Q14: Please indicate to what degree your opinion of the Ozarks is positive or negative. (5-pt. scale)

Branson drives most of the Ozarks' collective advertising awareness followed distantly by a few other Missouri destinations.

Ad Awareness*



Seen/Heard Ads for Area Destinations



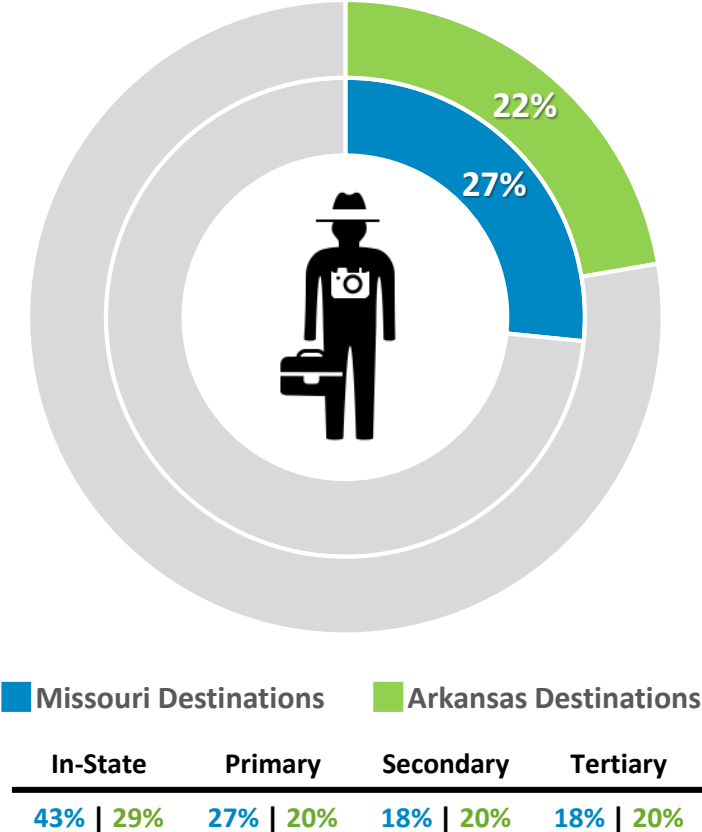
54%
Saw No Ads for Any Destination Familiar With

Q22: In the past 6 months, have you seen or heard advertisements for the following destinations? Please select all that apply.

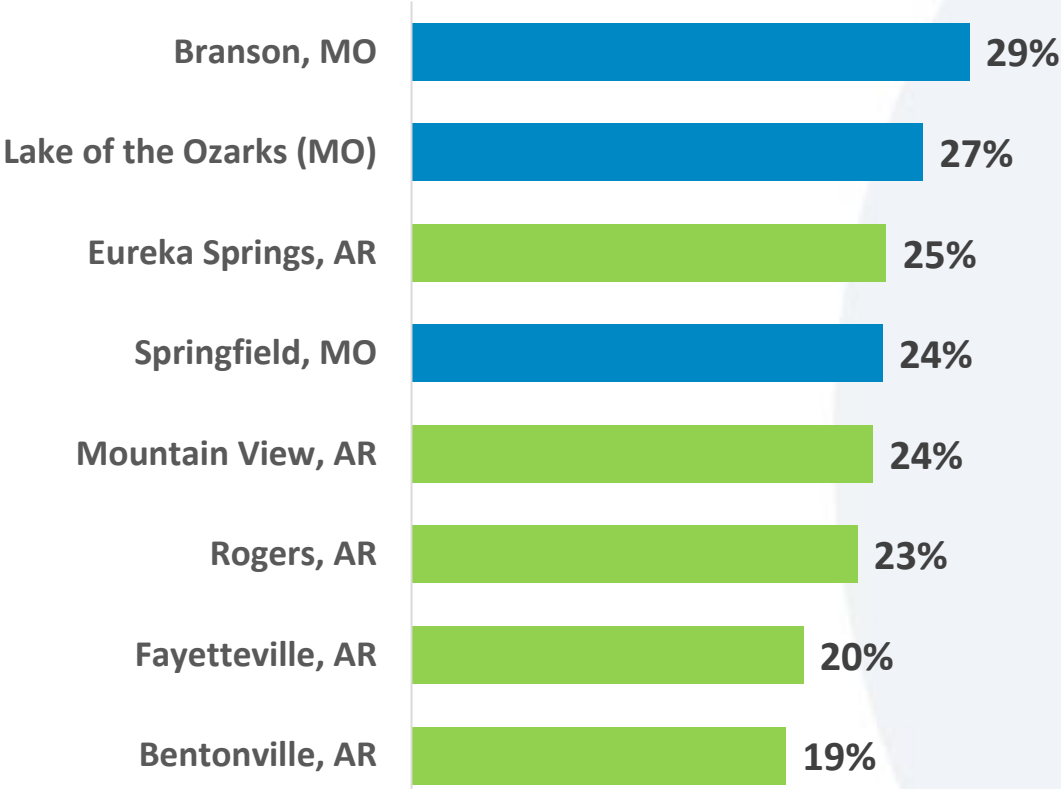
*Saw ad for any MO or AR destination.

Branson and Lake of the Ozarks have the highest levels of intent to visit; however, aggregate intent to visit these Missouri Ozarks' destinations is somewhat lower than the H2R Norm.

Intent to Visit Area Destinations



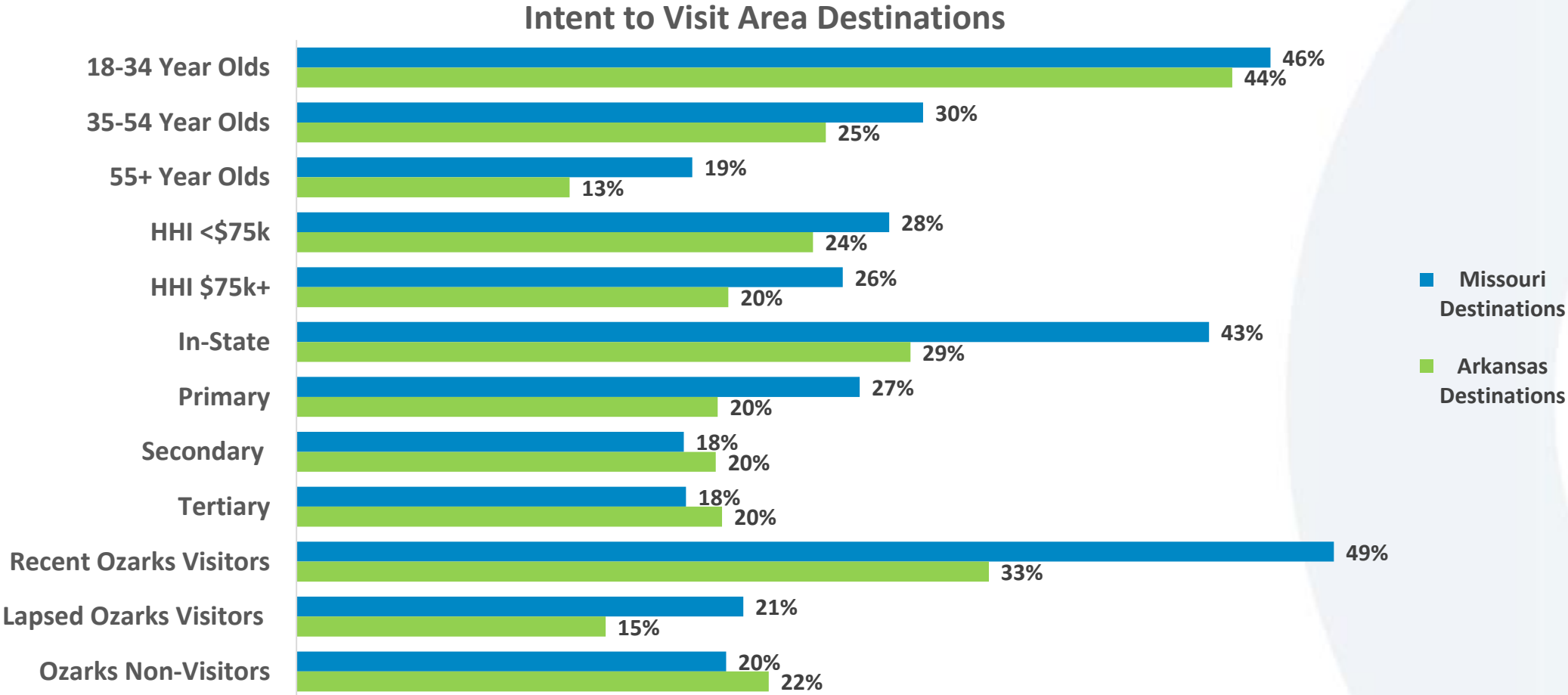
% Probably/Definitely Will Visit Destinations



H2R Proprietary Industry Norm: 34%

Q23: Please indicate how likely you are to visit each of the following destinations in the next 12 months. (5-pt. scale)

Younger travelers are significantly more likely to visit both Missouri and Arkansas destinations in the next 12 months.

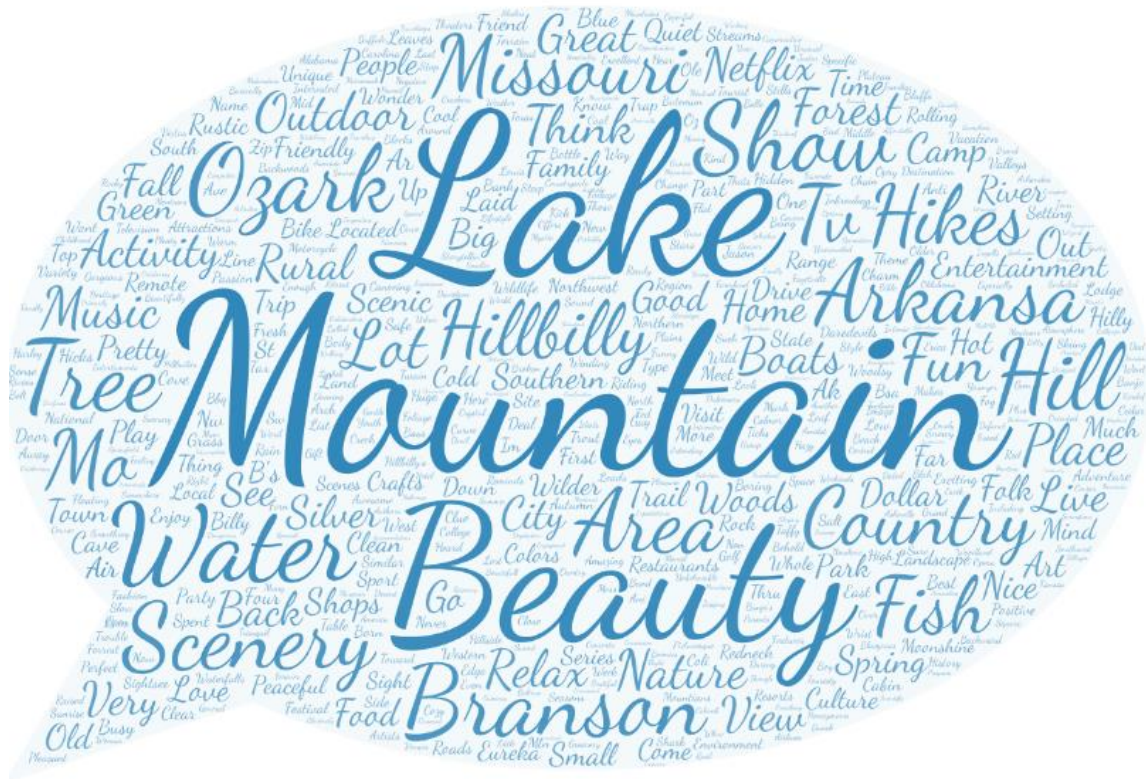


Q23: Please indicate how likely you are to visit each of the following destinations in the next 12 months. (5-pt. scale)

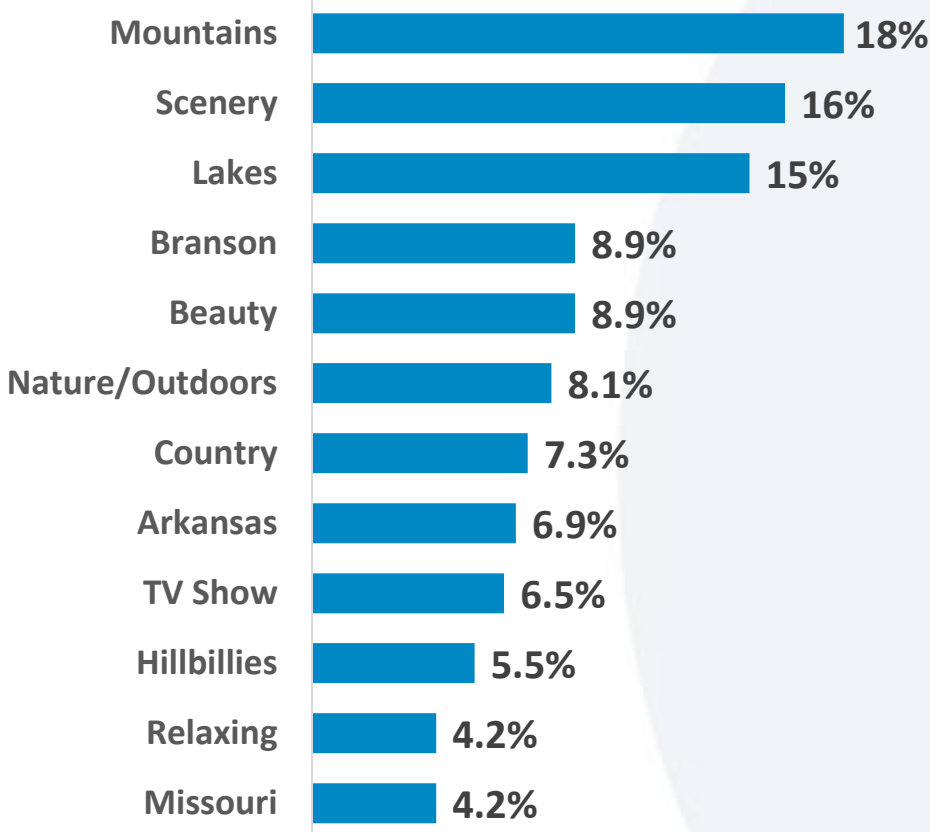
Ozarks Area Perception

02

Travelers most associate the Ozarks with terms such as mountains, scenery, lakes and Branson.



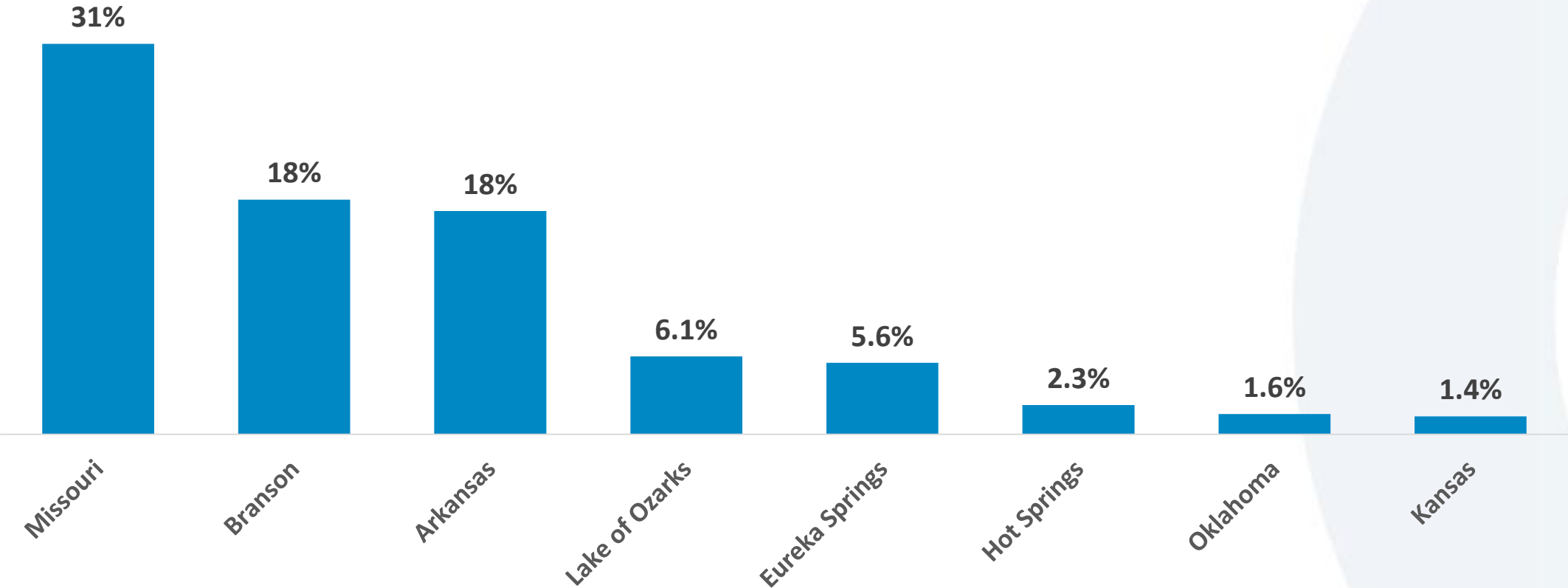
Top of Mind Themes - Unaided



Q15: When you hear the term, "the Ozarks," what first comes to mind? Please be specific.

Travelers were just as likely to mention states as they were to mention individual destinations as being part of the Ozarks.

Top of Mind Cities, Towns and/or Areas Considered to be in the Ozarks – Unaided

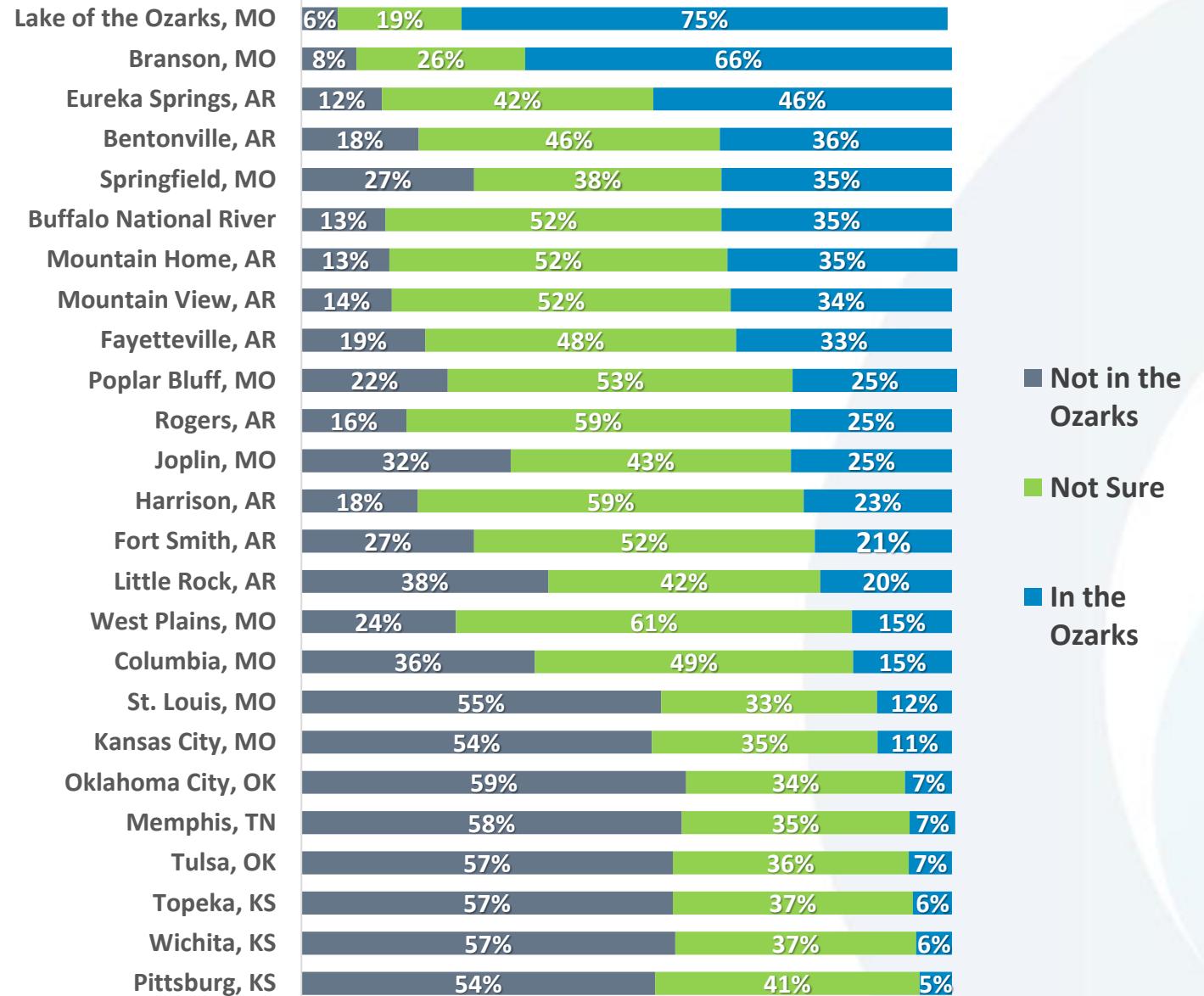


Q17: What cities, towns and/or areas do you consider to be a part of the Ozarks? Please list at least 3.

Cities in the Ozarks

Perception is reality. Area travelers are most certain that Lake of the Ozarks is in the Ozarks. This is followed by Branson and Eureka Springs as also being part of the Ozarks.

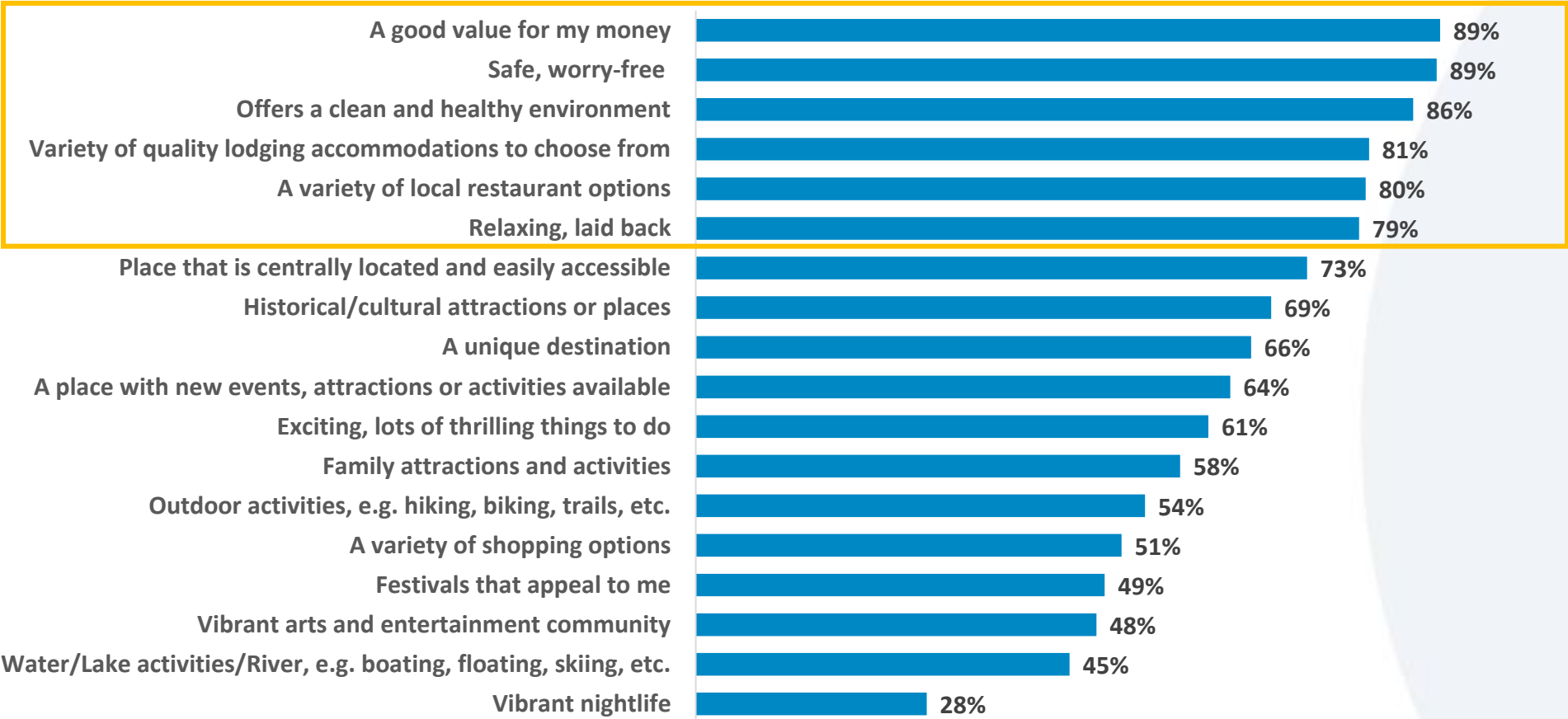
Half or more of area travelers are unsure of many destinations – including Buffalo National River, Mountain Home, Mountain View, Fayetteville, Poplar Bluff, Rogers, Harrison, Fort Smith, West Plains and Columbia.



Q18: Please review each of the following cities/towns/places below and indicate which ones you consider to be a part of the Ozarks.

Value, safety and cleanliness are considered most important when deciding upon which destination to visit for leisure.

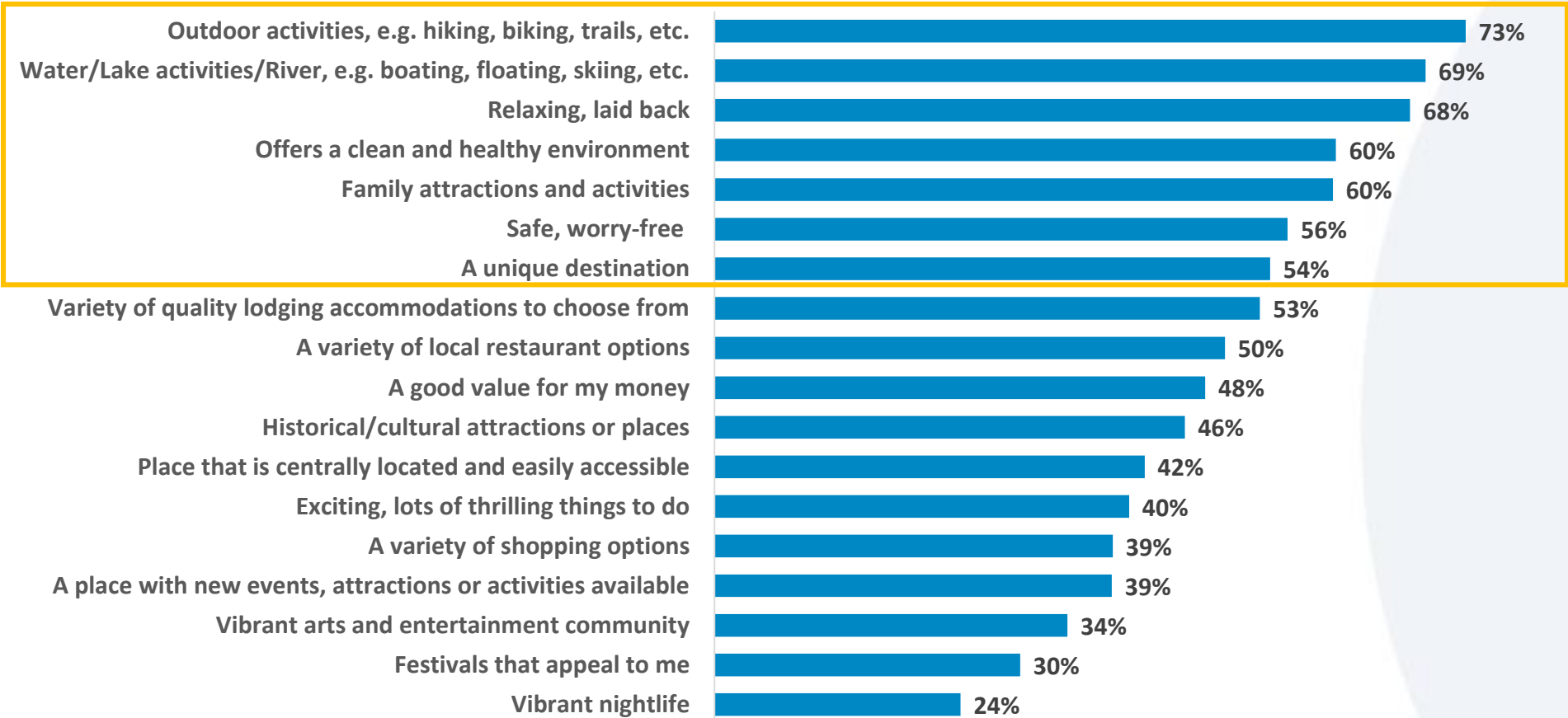
% Somewhat/Very Important Attributes to Travelers When Visiting Destinations



Q8: Please indicate how important each of the following attributes or characteristics are to you when thinking about destinations you would choose to visit. (5-pt. scale)

Visitors to the Ozarks agree most that outdoor activities, water/lake activities and a relaxing atmosphere best describe the area.

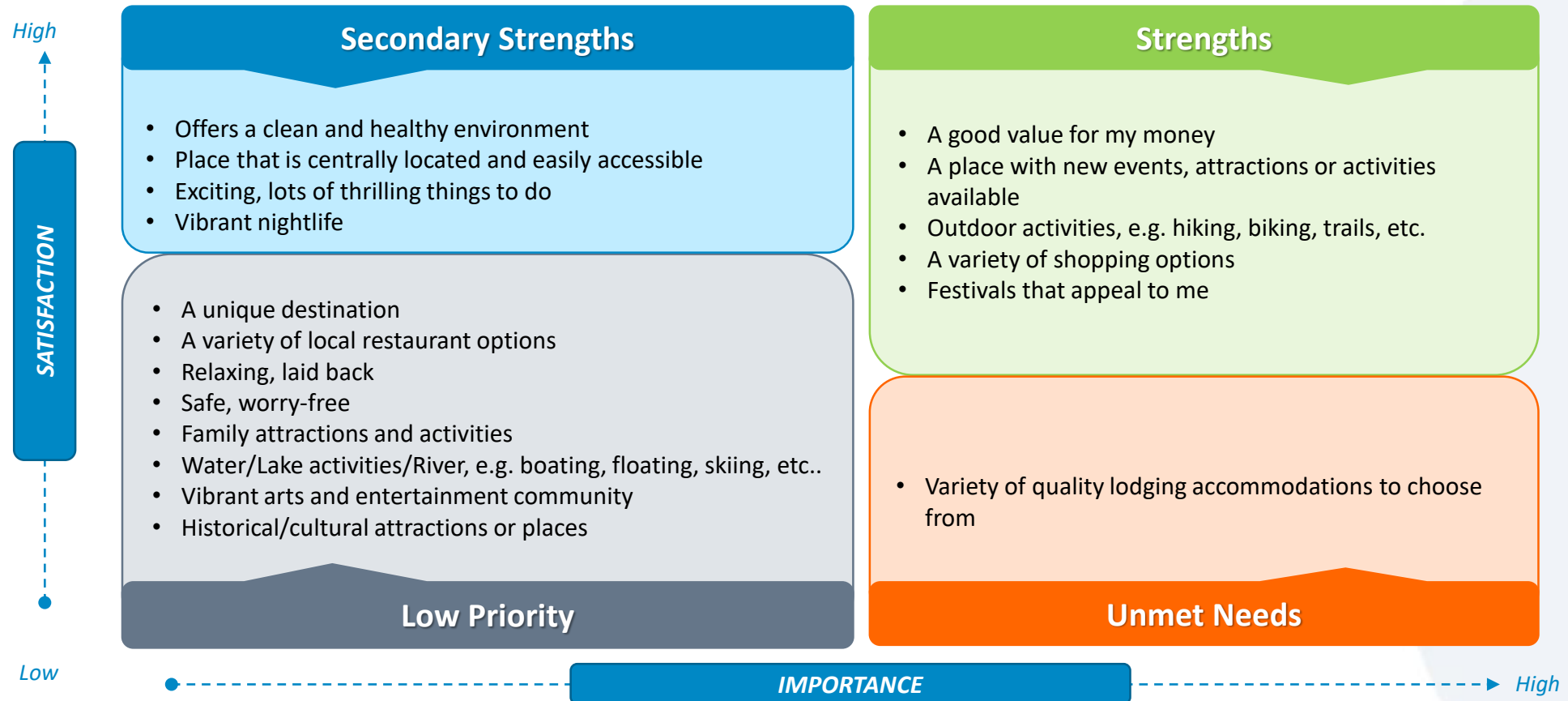
% Describes The Ozarks Very Well/Perfectly



Q16: Please rate how well you believe the following attributes describe the Ozarks. (5-pt. scale)

The Strengths Finder analysis revealed that the Ozarks has many strengths including being a good value and a place with new events, attractions and activities. However, travelers perceive that there aren't enough quality lodging accommodations.

Ozarks Area Strengths Finder*



Q8: Please indicate how important each of the following attributes or characteristics are to you when thinking about destinations you would choose to visit. (5-pt. scale)

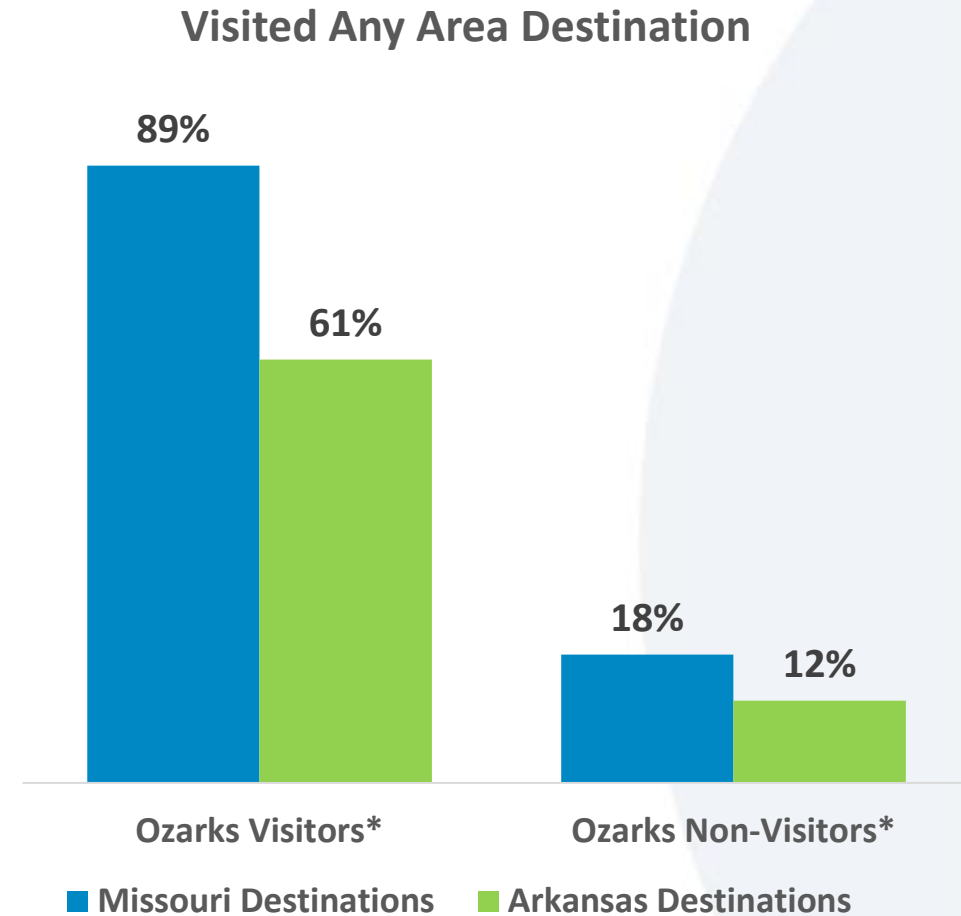
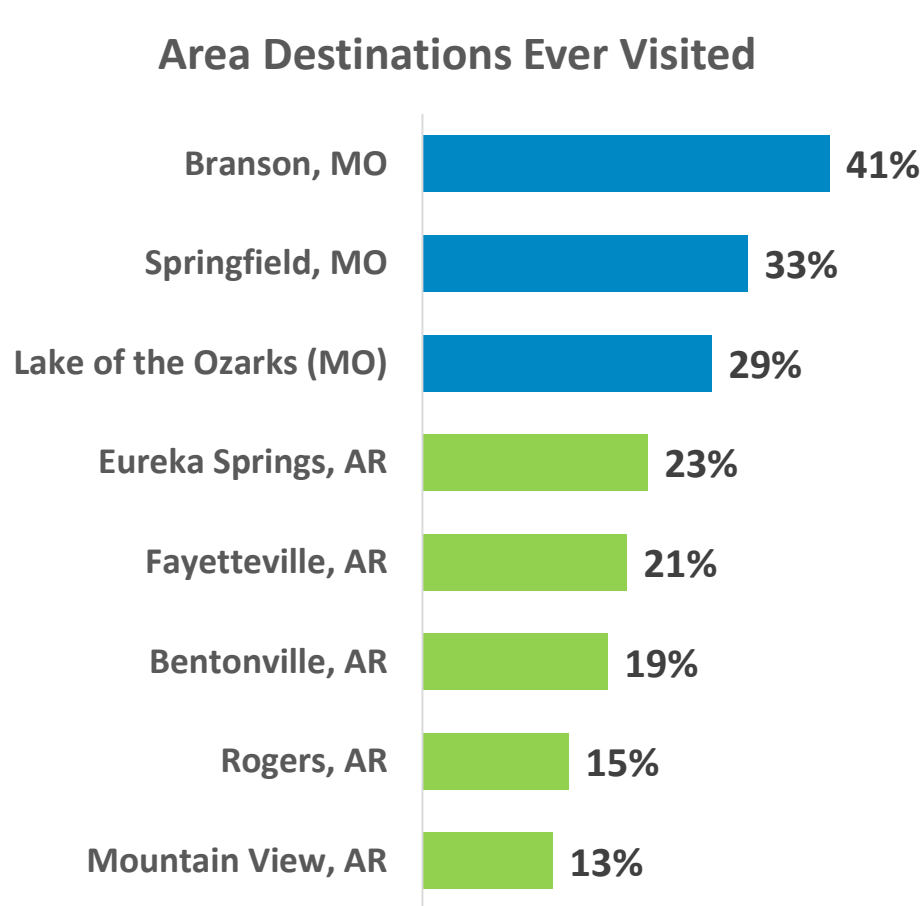
Q16: Please rate how well you believe the following attributes describe the Ozarks. (5-pt. scale)

*The methodology for the Strengths Finder can be found in the Appendix of this report.

Ozarks Area Visitors

03

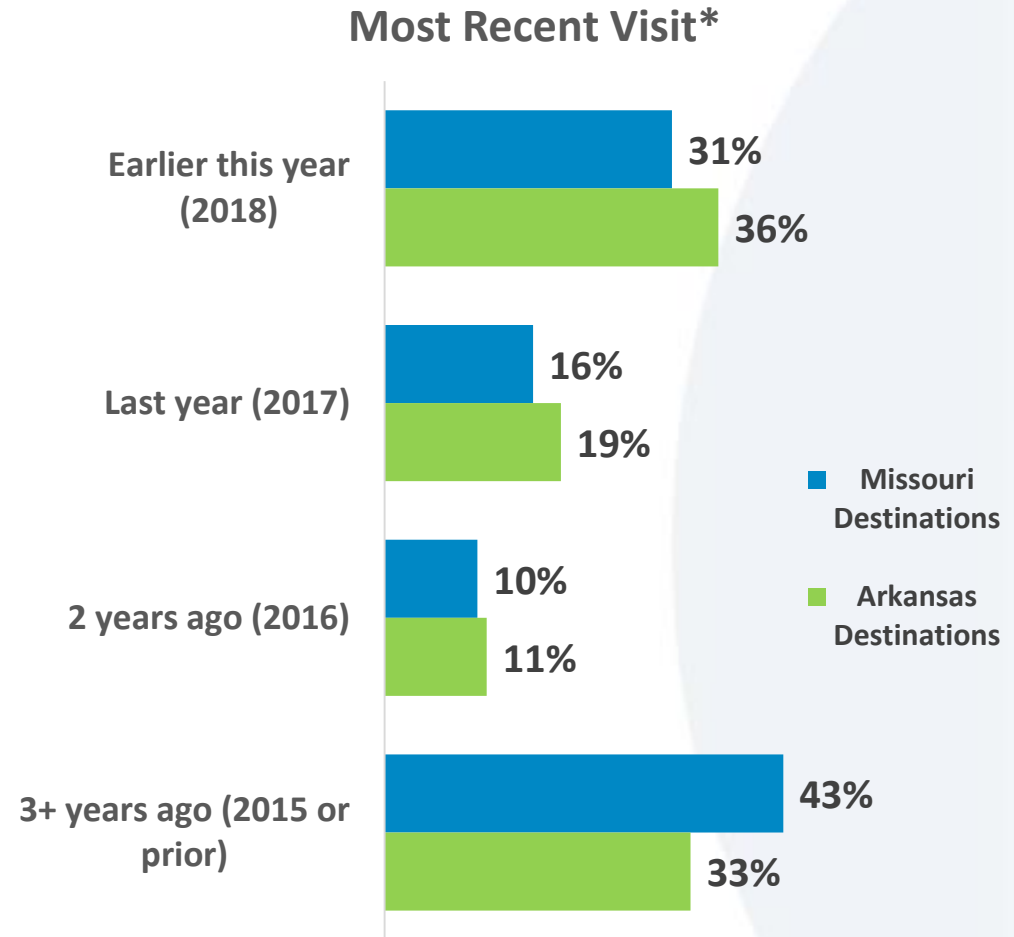
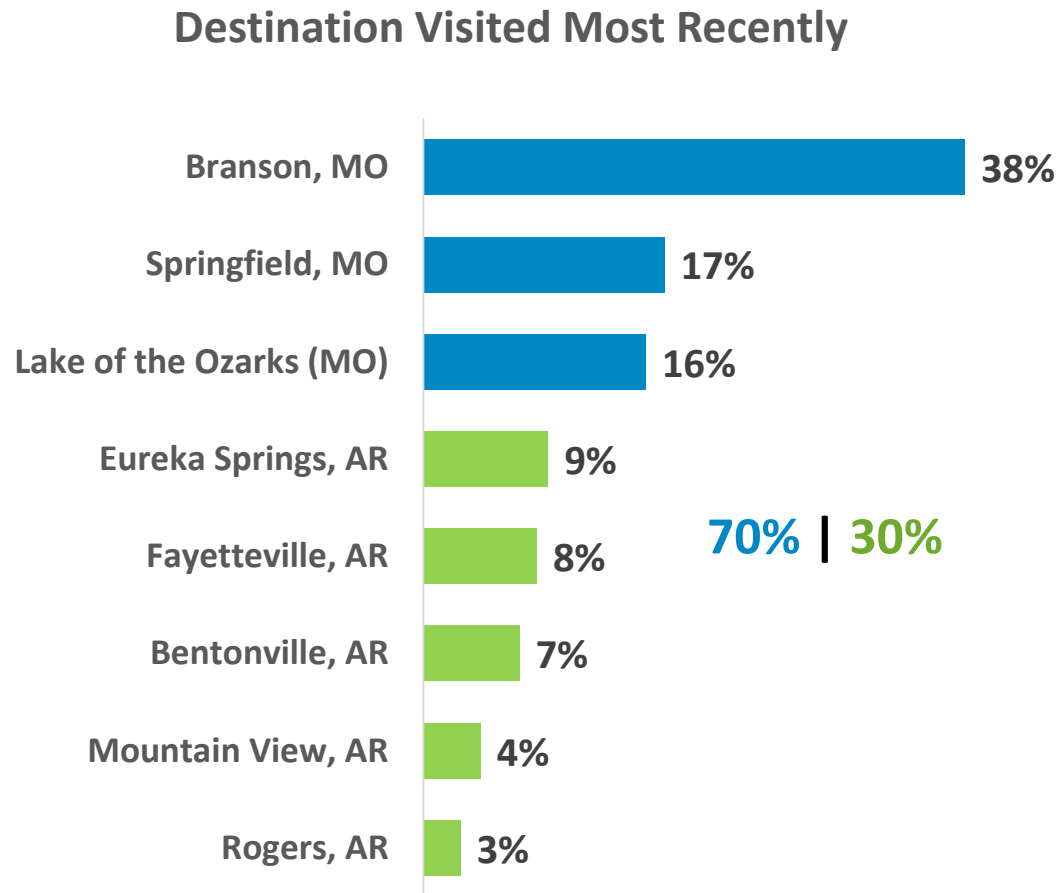
Missouri destinations are slightly more popular among area travelers. Interestingly, there are some Ozarks Non-Visitors who say they have visited these area destinations.



Q20: Please indicate your awareness and prior visitation of the following destinations.

*Based on Q11: Please indicate your awareness and prior visitation of the following areas.

More Missouri destinations were most recently visited than Arkansas. And, nearly one-third of the visitation occurred in 2018.



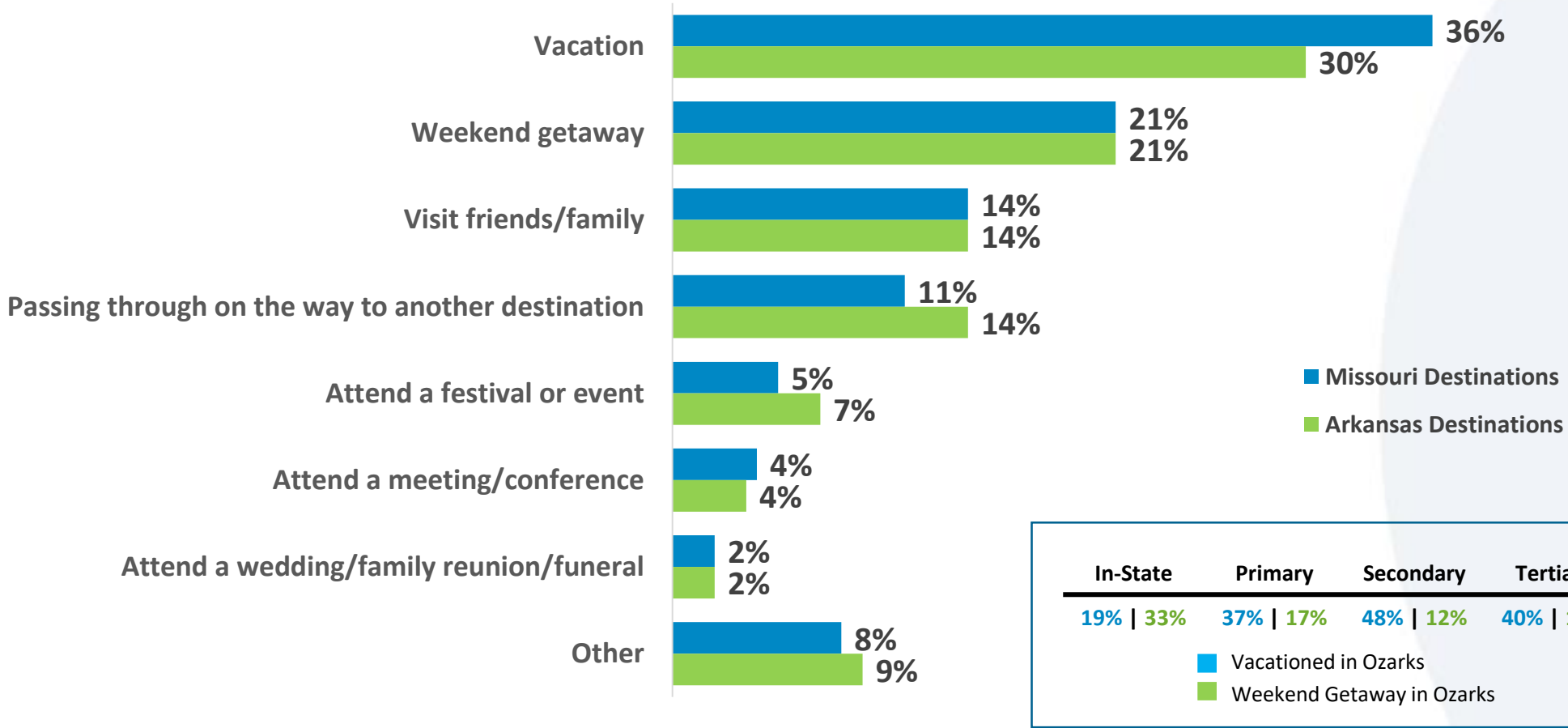
Q24: Which of these places have you visited most recently?

Q25: When was your most recent visit to [INSERT MOST RECENT DESTINATION VISITED]?

*Based on answer to Q24: Which of these places have you visited most recently?

Vacations and weekend getaways are the primary reasons most travelers have visited Ozarks' destinations recently.

Primary Purpose of Visit to Most Recent Destination Visited

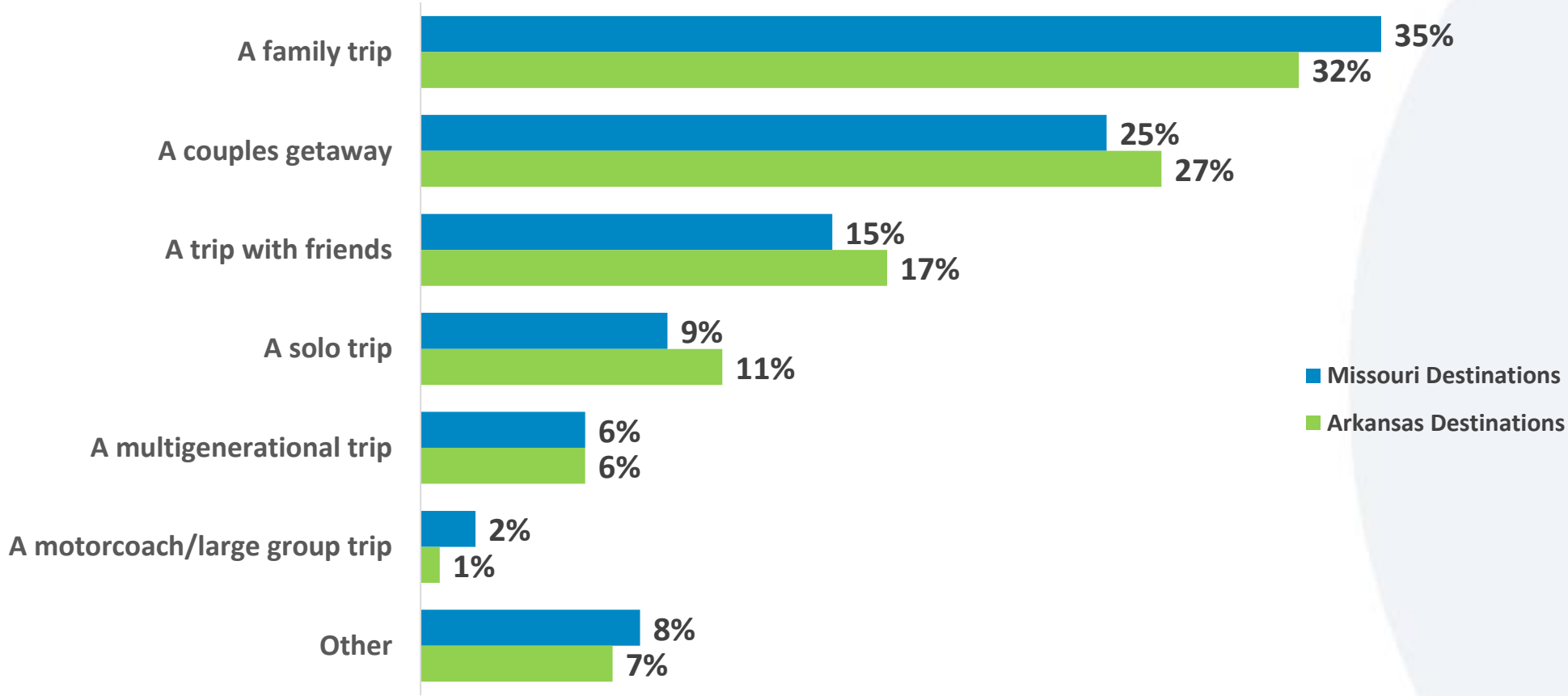


Q26: What was the primary purpose of your trip to [INSERT MOST RECENT DESTINATION VISITED]?

RESPONDENT BASE:
 VISITED ANY OZARKS AREA DESTINATION | N=650 44
 VISITED ANY MO DESTINATION | N=594
 VISITED ANY AR DESTINATION | N=402

Family trips and couples getaways are most popular—and even more so among Missouri visitors. Friends trips, couples getaways and solo trips are much more popular among Arkansas visitors.

Type of Trip Taken to Most Recent Destination Visited



Q27: Which of the following best describes the type of trip you took to [INSERT MOST RECENT DESTINATION VISITED]?

Ozarks Visitor Party Composition

	All Visitors	Missouri Visitors	Arkansas Visitors
Average Adult Age	50.0	50.0	51.1
Average Child Age	9.3	9.4	9.7
Ages 12 and Under Party Members	11%	11%	10%
Ages 13-17 Party Members	7%	7%	7%
Ages 18-34 Party Members	18%	18%	17%
Ages 35-54 Party Members	28%	28%	25%
Ages 55+ Party Members	36%	36%	41%
Party Size	3.0	3.1	2.9
Parties with Children	28%	29%	24%
Adult Only Parties	72%	71%	76%
Parents/couples/friends w/ children 12 and under	11%	11%	9%
Parents/couples/friends w/ teenagers (13-17)	7%	7%	7%
Parents/couples/friends w/ adult children (18 and up)	7%	7%	7%
Multi-generational family	10%	10%	9%
Grandparents with grandchildren under 18	1%	1%	1%
Other	4%	4%	4%

Q28: Including yourself, how many people in your immediate travel party on that same trip fall into the following age categories?
 Q29: Which of the following best describes the composition of your immediate party on that same trip?

RESPONDENT BASE:
 VISITED ANY OZARKS AREA DESTINATION | N=650
 VISITED ANY MO DESTINATION | N=594
 VISITED ANY AR DESTINATION | N=402

Ozarks Visitor Party Composition

	All Visitors	Springfield Visitors	Branson Visitors	Eureka Springs Visitors
Average Adult Age	50.0	50.3	50.8	52.8
Average Child Age	9.3	9.4	9.2	9.5
Ages 12 and Under Party Members	11%	9%	11%	10%
Ages 13-17 Party Members	7%	6%	6%	6%
Ages 18-34 Party Members	18%	17%	16%	14%
Ages 35-54 Party Members	28%	29%	28%	24%
Ages 55+ Party Members	36%	39%	39%	46%
Party Size	3.0	3.0	3.1	3.0
Parties with Children	28%	25%	29%	23%
Adult Only Parties	72%	75%	71%	77%
Parents/couples/friends w/ children 12 and under	11%	9%	11%	11%
Parents/couples/friends w/ teenagers (13-17)	7%	6%	7%	5%
Parents/couples/friends w/ adult children (18 and up)	7%	8%	7%	7%
Multi-generational family	10%	10%	11%	9%
Grandparents with grandchildren under 18	1%	1%	1%	1%
Other	4%	4%	4%	4%

Q28: Including yourself, how many people in your immediate travel party on that same trip fall into the following age categories?

Q29: Which of the following best describes the composition of your immediate party on that same trip?

RESPONDENT BASE: VISITED ANY OZARKS AREA DESTINATION | N=650

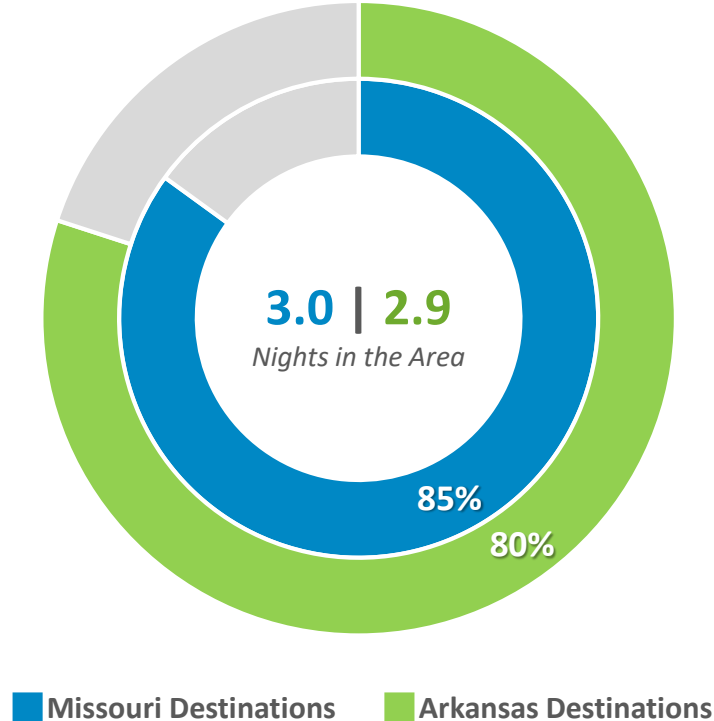
SPRINGFIELD VISITORS | N=391

BRANSON VISITORS | N=489

EUREKA SPRINGS VISITORS | N=272

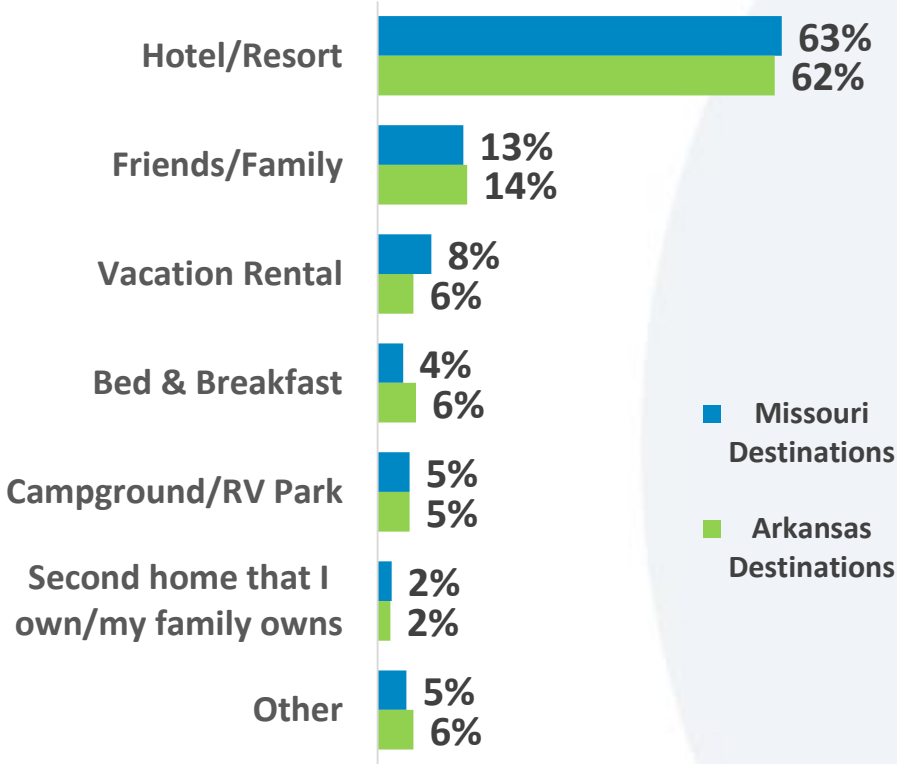
Most Visitors spent the night on their most recent visit to the area, with the majority choosing a hotel/resort for their stay.

Spent the Night on Most Recent Visit



RESPONDENT BASE: VISITED ANY OZARKS AREA DESTINATION | N=650
 VISITED ANY MO DESTINATION | N=594; VISITED ANY AR DESTINATION | N=402

Overnight Accommodations



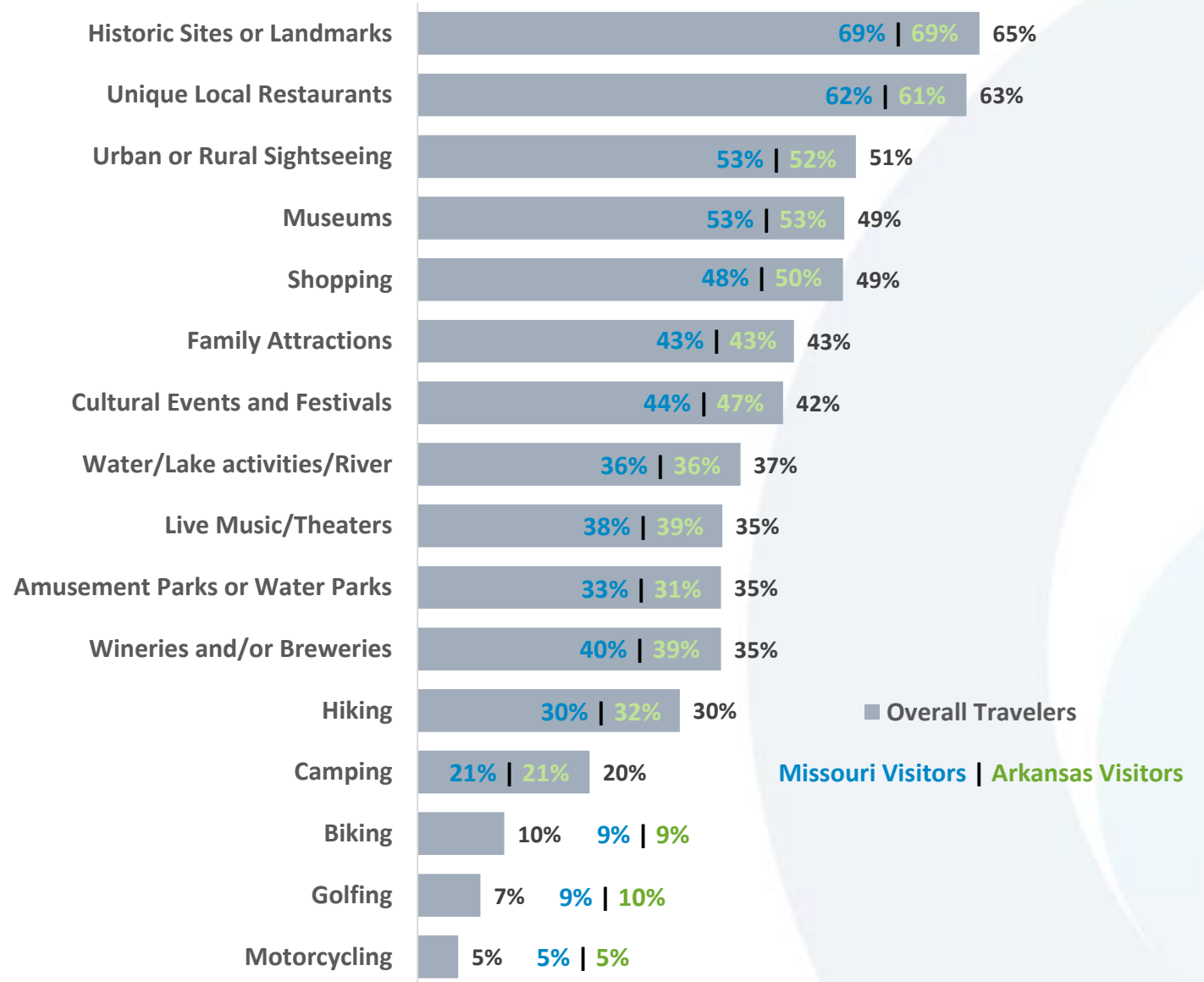
RESPONDENT BASE: STAYED THE NIGHT IN ANY OZARKS AREA DESTINATION | N=539
 STN IN ANY MO DESTINATION | N=498; STN IN ANY AR DESTINATION | N=317

Q30: How many nights did you spend in [INSERT MOST RECENT DESTINATION VISITED] on that visit?
 Q31: Which of the following best describes the accommodations where you stayed on that visit?

Activities Enjoyed When Traveling

Overall, travelers most enjoy visiting historic sites and unique local restaurants most when traveling.

However, it is interesting to note that Missouri and Arkansas Visitors are much more likely than the general traveler to enjoy historical sites, museums, cultural events and festivals, live music/theaters and wineries and/or breweries. But, are somewhat less likely to enjoy Amusement Parks or Water Parks.

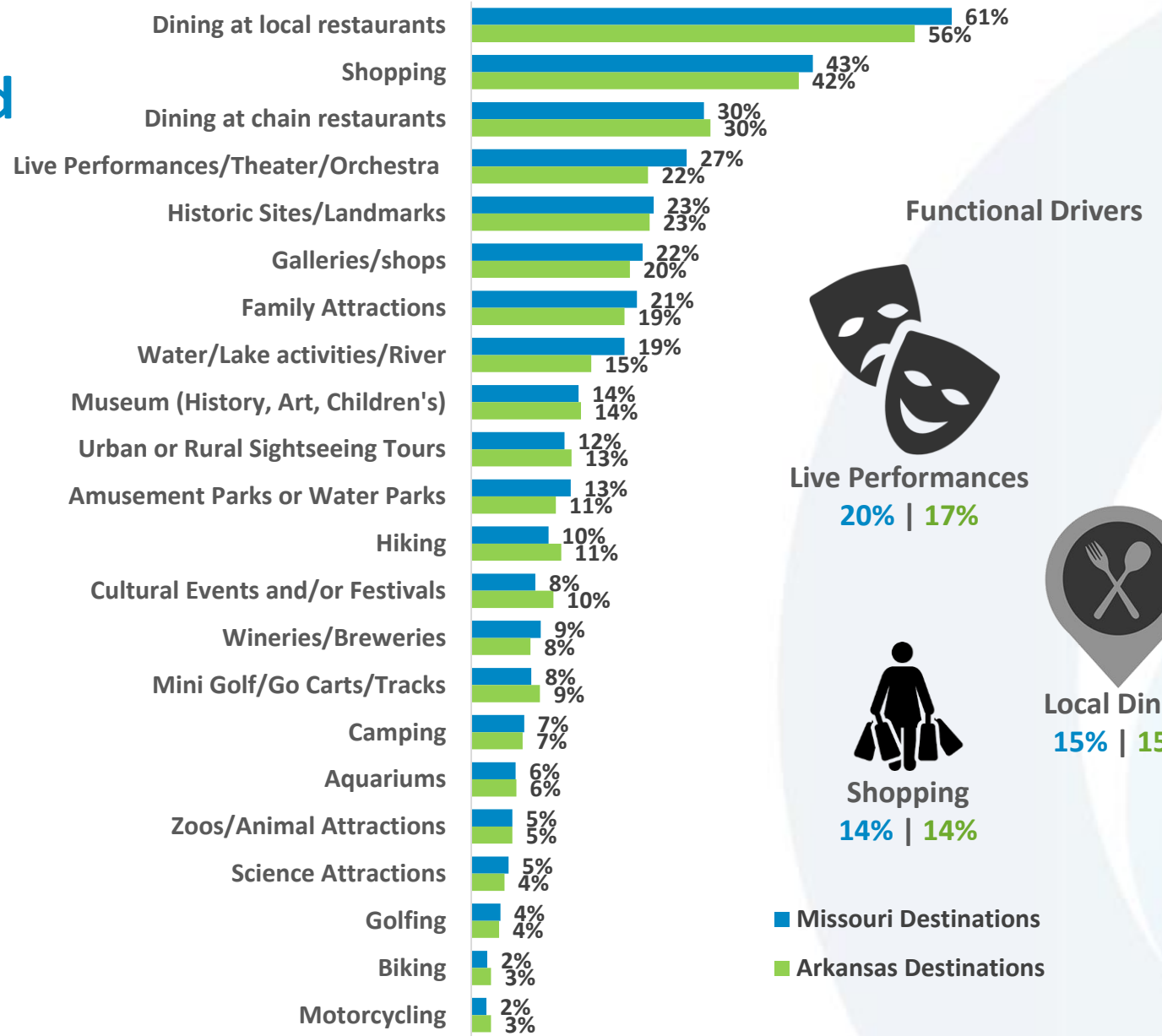


Q10: What activities do you most enjoy when traveling? Please select all that apply

Attractions/Activities Visited

When visiting the Ozarks travelers are most likely to dine at local restaurants and shop.

Historic Sites rank 5th on the list of area activities visited by area travelers. This discrepancy between what they enjoy and what they actually engage in while visiting could be driving the unmet need for Historic Sites in the area.



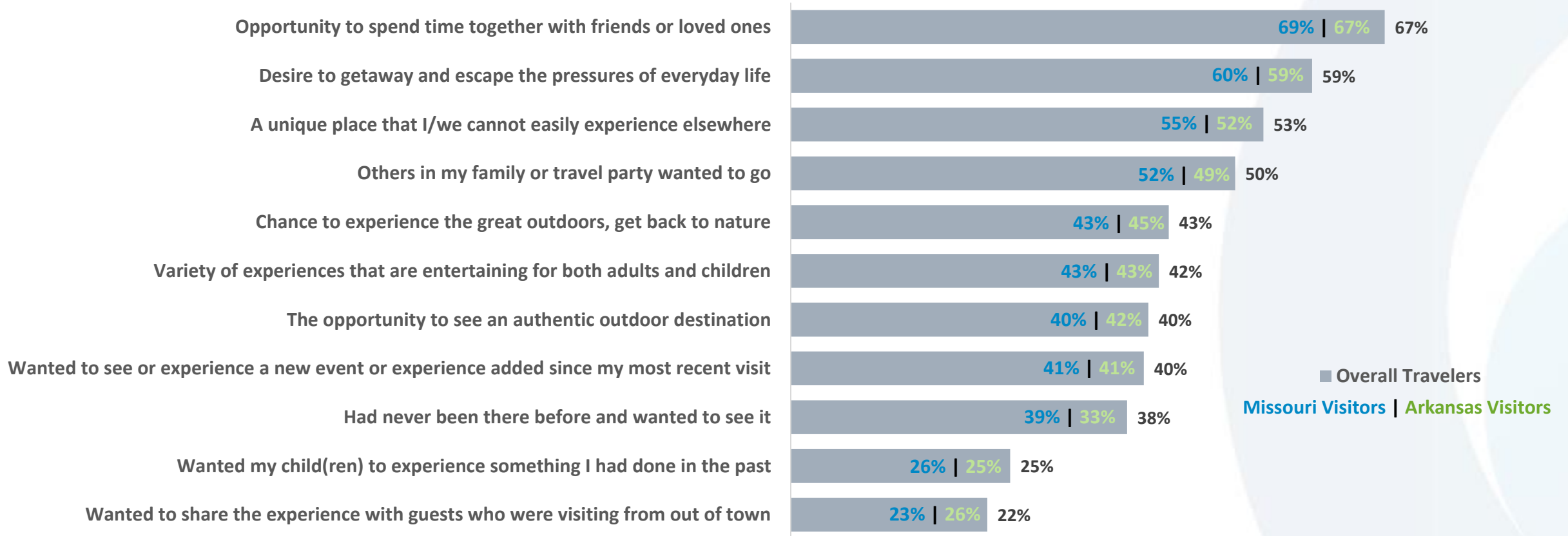
Q32: Which of the following activities did you participate in on that visit to [INSERT MOST RECENT DESTINATION VISITED]? Please select all that apply.

Q33: Of these activities, please indicate if there were any that were a major influence in your decision to visit [INSERT MOST RECENT DESTINATION VISITED]. Choose up to 3.

RESPONDENT BASE: VISITED ANY OZARKS AREA DESTINATION | N=650
 VISITED ANY MO DESTINATION | N=594
 VISITED ANY AR DESTINATION | N=402

The top emotional drivers of visitation to the area are the opportunity to spend time with friends/family and to escape the pressures of everyday life.

% Somewhat/Very Important Emotional Drivers of Visitation



Q34: Please indicate how important the following issues were in motivating or inspiring you to visit [INSERT MOST RECENT DESTINATION VISITED]. (5-pt. scale)

RESPONDENT BASE: VISITED ANY OZARKS AREA DESTINATION | N=650 51
 VISITED ANY MO DESTINATION | N=594
 VISITED ANY AR DESTINATION | N=402

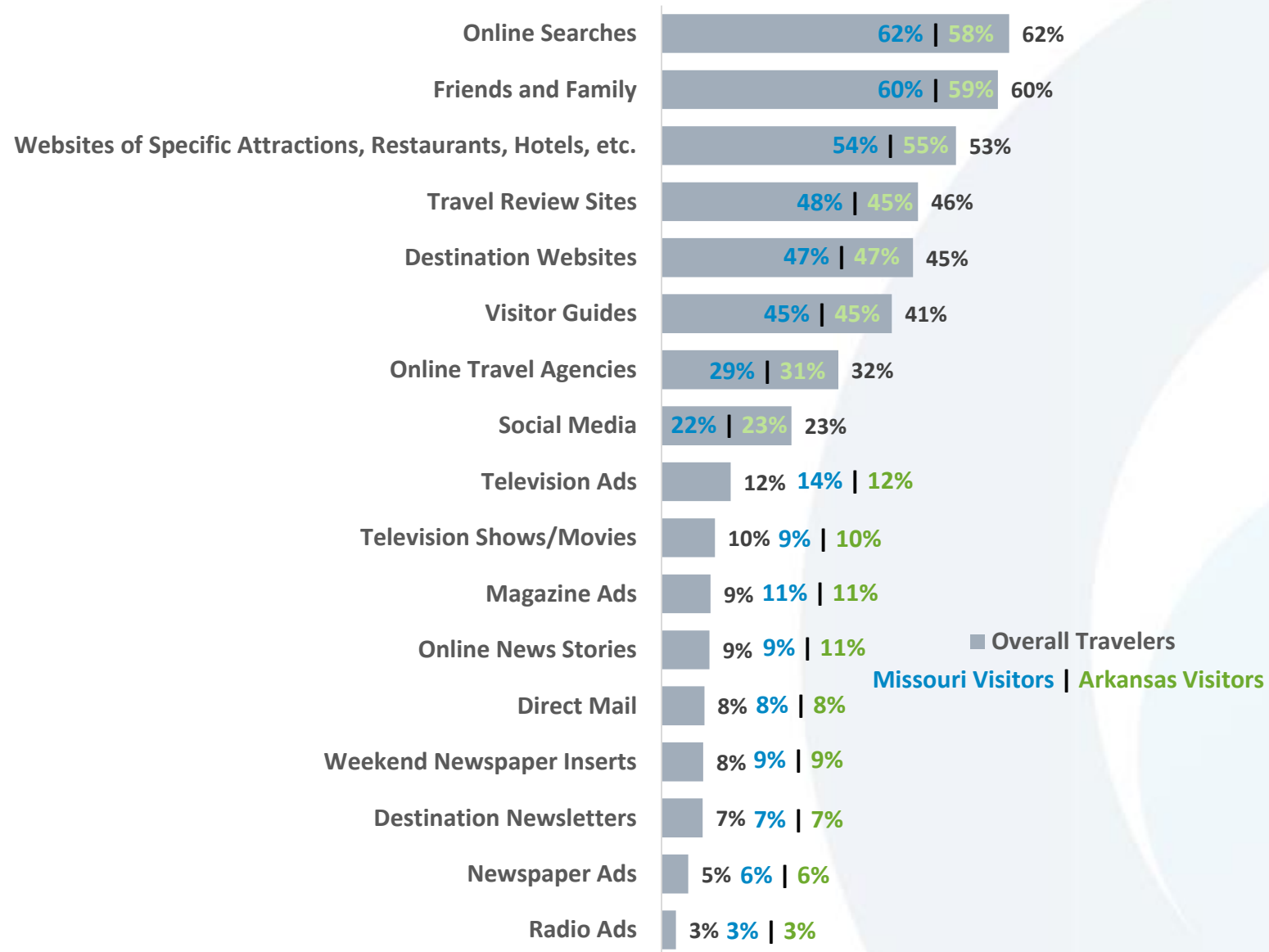
Media Usage Insights

04

Media Sources Used for Travel Planning

Online searches and speaking with friends and family are the most popular sources of information for travel planning purposes.

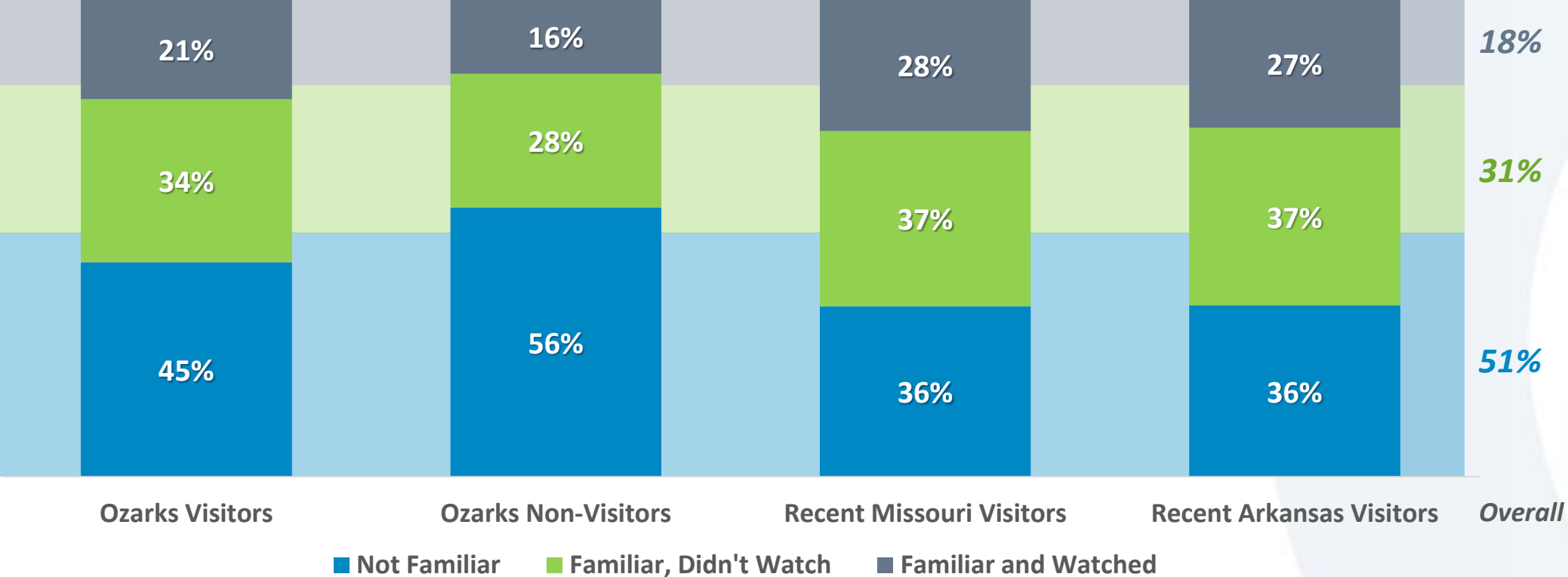
Visitors to both Missouri and Arkansas also use websites of specific attractions, hotels and restaurants, travel review sites and destination websites fairly regularly to plan their travel.



Q9: Which of the following sources are you most likely to use when planning to travel to places you might like to visit? Please select all that apply.

RESPONDENT BASE:
 ALL RESPONDENTS | N=1,200 53
 VISITED ANY MO DESTINATION | N=594
 VISITED ANY AR DESTINATION | N=402

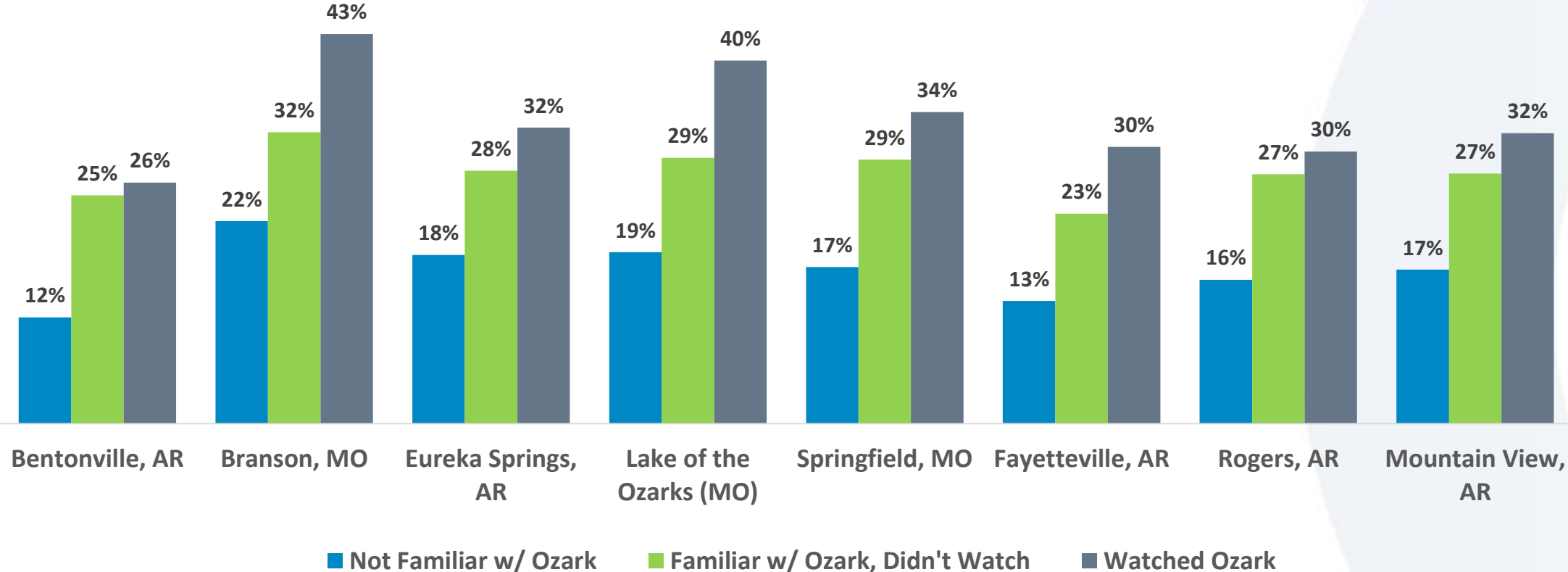
Overall, about half of travelers are familiar with the Netflix Series *Ozark*. However, those who've recently visited Missouri and Arkansas are much more likely to have viewed the show.



Q35: Using the scale provided, please indicate how familiar (if at all) you are with the Netflix series *Ozark*.

Those who watched *Ozark* are much more likely to visit area destinations—especially Branson and Lake of the Ozarks.

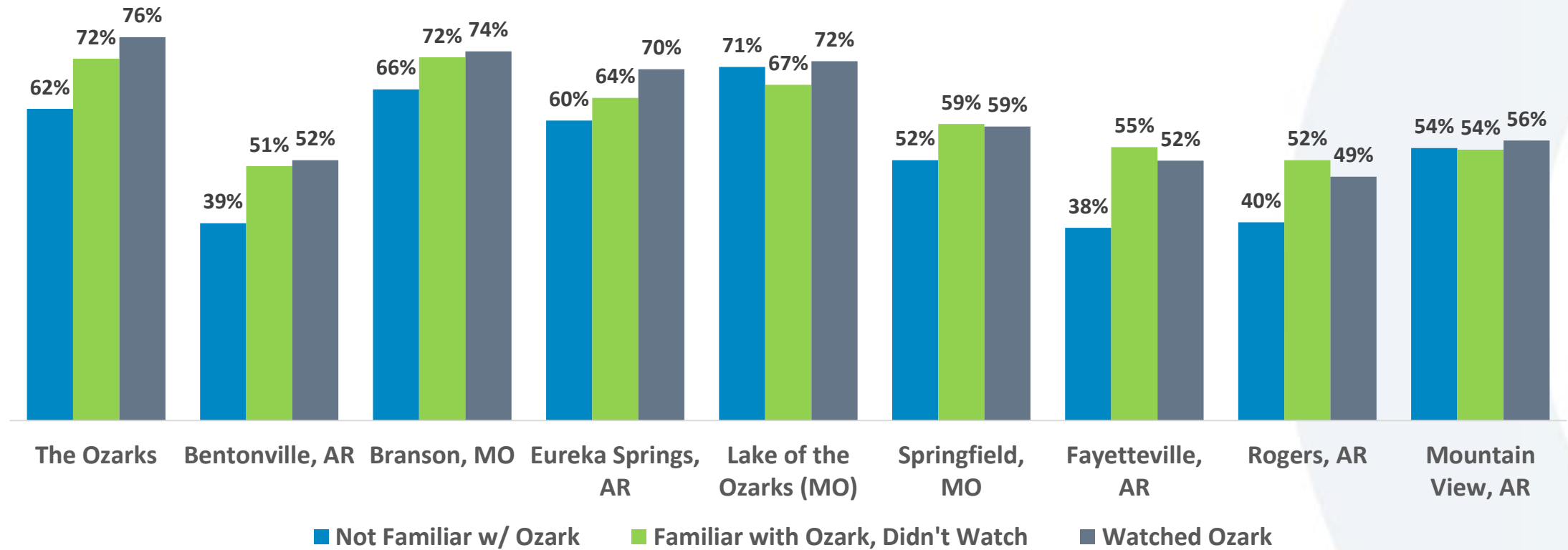
Intent to Visit Ozarks Area Destinations – % Probably/Definitely Will Visit



Q23: Please indicate how likely you are to visit each of the following destinations in the next 12 months. (5-pt. scale)
 *Based on Q35: Using the scale provided, please indicate how familiar (if at all) you are with the Netflix series *Ozark*.

Those who watched *Ozark* are also more likely to have a positive opinion of the Ozarks.

Favorable Opinion of Destinations – % Somewhat/Very Positive Opinion



Q14: Please indicate to what degree your opinion of the Ozarks is positive or negative. (5-pt. scale)
 Q21: Please indicate to what degree your opinion of the following destinations is positive or negative. (5-pt. scale)
 *Based on Q35: Using the scale provided, please indicate how familiar (if at all) you are with the Netflix series *Ozark*.

Ozark Viewers tend to be much younger than Ozarks Visitors.

	Overall	Not Familiar with Ozark	Familiar, Didn't Watch Ozark	Watched Ozark
Respondent Age	52.3	56.9	47.6	47.1
18-34 years old	18%	11%	29%	22%
35-54 years old	31%	25%	32%	44%
55+ years old	51%	64%	39%	34%
Familiar with The Ozarks	89%	86%	92%	93%
Visited the Ozarks	44%	39%	49%	52%
Believes Lake of the Ozarks is in the Ozarks	75%	73%	77%	76%
Familiar with Bentonville, AR	52%	45%	60%	62%
Familiar with Branson, MO	81%	79%	84%	81%
Familiar with Eureka Springs, AR	51%	43%	60%	61%
Familiar with Lake of the Ozarks (MO)	65%	59%	67%	79%
Familiar with Springfield, MO	68%	61%	74%	75%
Familiar with Fayetteville, AR	55%	46%	63%	65%
Familiar with Rogers, AR	38%	30%	43%	52%
Familiar with Mountain View, AR	40%	32%	48%	48%

Q35: Using the scale provided, please indicate how familiar (if at all) you are with the Netflix series Ozark.

Barriers to Visitation

05

A lack of interest and competition for time is what Non-Visitors say has kept them from visiting the Ozarks.

NOT INTERESTED – 16%

"I may want to travel there if I learned of things to do there that interests me."

HAVEN'T HAD TIME – 12%

"Don't have enough time to visit, other areas I would prefer to go."

TOO FAR AWAY – 12%

"I haven't visited this because it seems like a long travel. It seems very far away and I might have to travel by plane."

TOO EXPENSIVE – 10%

"We have taken shorter trips to save on money."

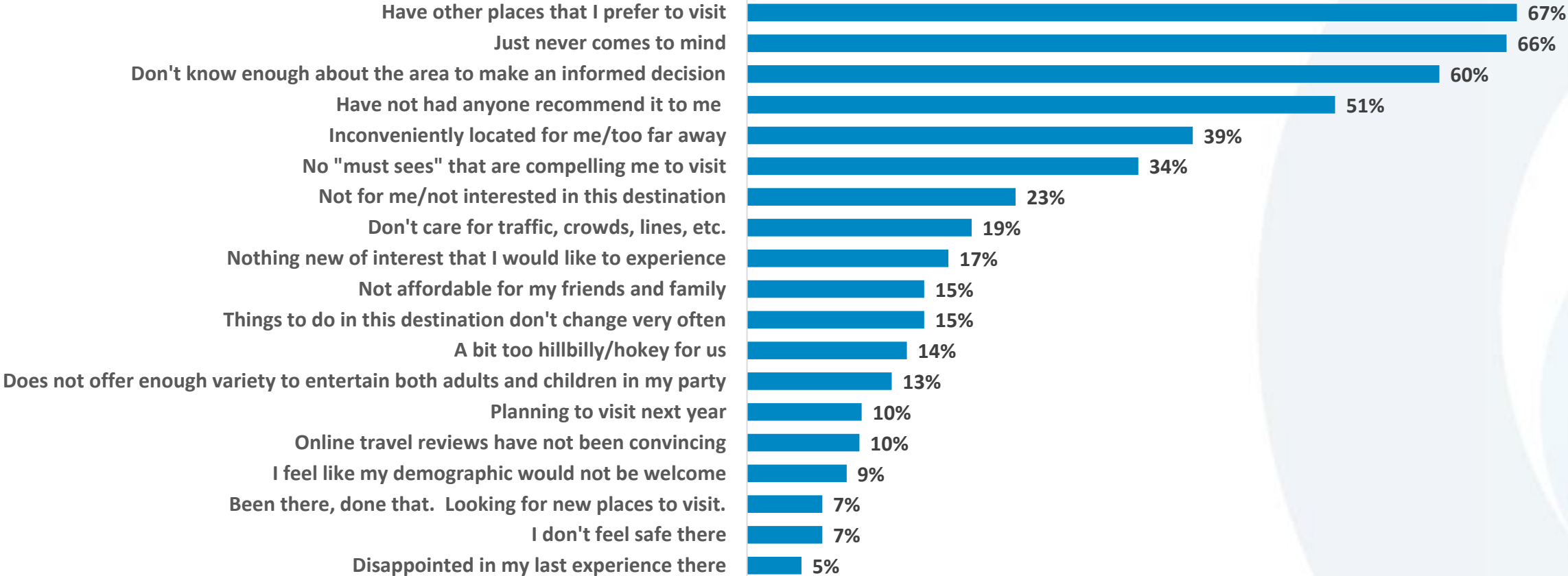
DOESN'T COME TO MIND – 7%

"It's never been high on the list of "must see" places..."

Q12: Do you have any particular reason why you have not visited the Ozarks in recent years (or ever)?

Stated Barriers are largely aligned with unaided explanations. Competition and a lack of top of mind awareness are the biggest barriers.

% Agree/Strongly Agree with Reasons for Not Visiting The Ozarks



Q13: Please rate how strongly you agree with the following reasons for why you have not visited the Ozarks in the past 24 months, or if ever. (5-pt. scale)

When correlated with intent to visit, the Derived Barriers* reveal that the biggest issues are indeed competition, not being top-of-mind, lack of interest and perception as having no “must sees.”

STATED BARRIERS

1. Just never comes to mind
2. Have other places that I prefer to visit
3. Don't know enough about the area to make an informed decision
4. Have not had anyone recommend it to me
5. No "must sees" that are compelling me to visit
6. Inconveniently located for me/too far away
7. Not for me/not interested in this destination
8. Things to do in this destination don't change very often
9. Nothing new of interest that I would like to experience
10. Don't care for traffic, crowds, lines, etc.
11. Not affordable for my friends and family
12. A bit too hillbilly/hokey for us
13. Planning to visit next year
14. Does not offer enough variety to entertain both adults and children in my party
15. Online travel reviews have not been convincing
16. Been there, done that. Looking for new places to visit.
17. I feel like my demographic would not be welcome
18. I don't feel safe there
19. Disappointed in my last experience there.

DERIVED BARRIERS

1. Have other places that I prefer to visit
2. Just never comes to mind
3. Not for me/not interested in this destination
4. No "must sees" that are compelling me to visit
5. Inconveniently located for me/too far away
6. Have not had anyone recommend it to me
7. Nothing new of interest that I would like to experience
8. Things to do in this destination don't change very often
9. A bit too hillbilly/hokey for us
10. Don't know enough about the area to make an informed decision
11. Online travel reviews have not been convincing
12. Does not offer enough variety to entertain both adults and children in my party
13. Not affordable for my friends and family
14. Don't care for traffic, crowds, lines, etc.
15. I feel like my demographic would not be welcome
16. Disappointed in my last experience there.
17. I don't feel safe there
18. Been there, done that. Looking for new places to visit.
19. Planning to visit next year

Q13: Please rate how strongly you agree with the following reasons for why you have not visited the Ozarks in the past 24 months, or if ever.

*The methodology for Barrier Exposure Analysis can be found in the appendix of this report.

Profiles of Ozarks' Non-Visitors vs. Visitors

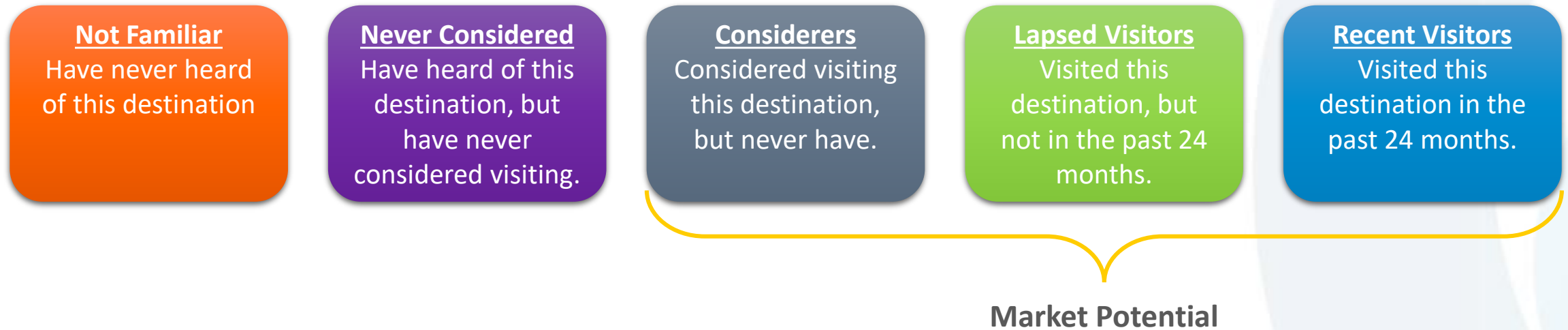
	Overall	Ozarks Non-Visitors	Ozarks Visitors
Average Adult Age in HH	50.3	48.4	52.7
Average Child Age in HH	8.8	8.5	9.4
Ages 12 and Under in HH	13%	15%	10%
Ages 13-17 in HH	6%	6%	6%
Ages 18-34 in HH	18%	21%	15%
Ages 35-54 in HH	25%	26%	23%
Ages 55+ in HH	38%	32%	46%
Household Size	2.5	2.6	2.4
Households with Children	27%	32%	21%
Adult Only Households	73%	68%	79%
White/European Households	88%	83%	96%
Other Ethnicity Households	12%	17%	4%
Household Income	\$80.5k	\$76.2k	\$86.0k
Straight/Heterosexual	95%	95%	96%
Lesbian, Gay, Homosexual or Other	5%	5%	4%

Appendix

Market Potential

H2R calculates market potential to determine what share of the market is the lowest hanging fruit for converting future visitation to a destination.

“Please indicate your awareness and prior visitation of the following destinations.”



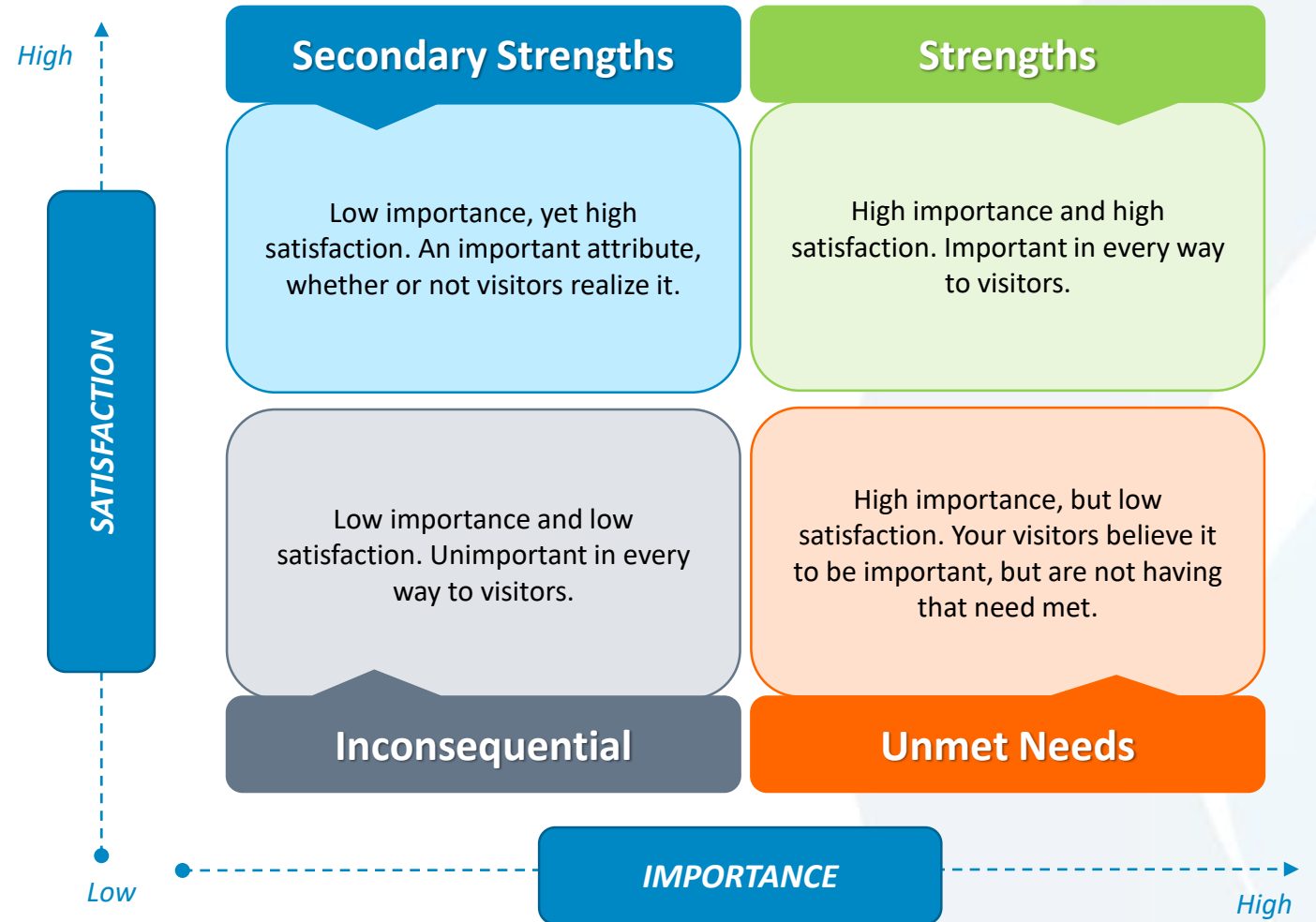
$$\text{Market Potential} = (\% \text{ Considerers}) + (\% \text{ Lapsed Visitors}) + (\% \text{ Recent Visitors})$$

Strengths Finder

Each of The Ozarks' attributes has been analyzed and segmented into four buckets in the chart to the right. Strengths Finder evaluates the relative importance of each element of the brand alongside visitors' satisfaction with each attribute as it relates to the Ozarks.

Respondents' top box scores for importance are plotted on the X axis while the top box scores for satisfaction are plotted on the Y axis. The average scores for each create the breaking points for the quadrants.

The resulting analysis illustrates which elements of satisfaction are most important by plotting each characteristic into one of four quadrants.



Barrier Exposure Analysis

- On the surface, Non-Visitors often provide fairly standard excuses for not visiting, which we refer to as *Stated Barriers* to visitation.
- Correlation analysis reveals to what extent Non-Visitors' Stated Barriers match up with their intent to visit the Ozarks. Arguably, the higher the correlation a barrier has with intent to visit, the more credible the barrier is as a root cause of not visiting. Those that correlate highest are referred to as *Derived Barriers*.



Stated Barriers

(what travelers *said* is keeping them from visiting the Ozarks)

Derived Barriers

(what *actually* correlates with their intent to visit the Ozarks)

Thank You!



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