

## **Executive Summary**

By  
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Travel Michigan advertised in four markets – Chicago, Cleveland, Indianapolis, and Green Bay from April through June 2002. In the Chicago, Cleveland, and Indianapolis market areas, a new travel advertising campaign was launched in the spring 2002. In the Green Bay market area, the previous campaign's television and newspaper advertisements were released along with a new radio and magazine ad.

Advertising effectiveness was measured in these four markets on a pre-campaign to post-campaign basis. Results were also compared to those achieved following the Spring 2001, Spring 2000, and Spring 1999 flights.

Telephone interviews were completed with 2,382 adult household members in the four *awareness* market areas – 1,187 pre-campaign (completed March 18, 2002 through April 4, 2002) and 1,195 post-campaign (completed June 14, 2002 through July 3, 2002).

### **A. ADVERTISING AWARENESS**

In the spring 2002, a new advertising campaign was released in three of the market areas -- Chicago, Cleveland, and Indianapolis. In the Green Bay market, the new ad campaign was used in radio and magazine ads but the 2001 campaign was used in the television and newspaper advertisements.

**Awareness of Michigan advertising in the past six months continues to be relatively high among travelers in all four awareness markets.**

- Post-campaign total awareness levels (aided and unaided) range from 68% in Indianapolis to 76% in Cleveland.

- There is an increase in all markets pre to post in unaided, total, and guided awareness of the advertising, suggesting that the advertising campaign is reaching the target markets.
- While there are no significant differences in unaided or total awareness from the spring 2001, the total awareness levels in Indianapolis continue in an upward trend from the spring 1999.

**Removing the “noise” from the guided awareness levels results in a conservative estimate of at least one traveler in five in the target markets combined recognizing the Michigan travel advertising.** Guided awareness levels are especially strong for both TV and radio advertising.

**Many believe that they are seeing a lot of Michigan advertising.** More than half believe that they saw or heard more travel advertising for Michigan than for other states.

- Claimed frequency of exposure is also high, ranging from 8.0 times in Indianapolis to 9.2 times in Green Bay in the past six months.

## **B. MICHIGAN AS A TRAVEL DESTINATION**

**Top-of-mind awareness of Michigan as a vacation destination remains low in the awareness markets with only 7% volunteering mention of the state.**

Since there is often a lag time between exposure to an advertisement and product saliency, the effects of the new advertising campaign on destination saliency will need to be measured over time. At this point, in all markets combined, Michigan is the third most often mentioned destination behind Wisconsin and Ontario.

- Michigan increased destination saliency in the Cleveland market after a decline in 2001.
- Top-of-mind awareness of Michigan as a Midwest destination is much higher than general destination saliency ranging from 11% in Cleveland to 24% in Chicago. This is compared to the general saliency ranging from 6% in

Cleveland and Green Bay to 9% in Chicago. Changes in these levels will need to be measured over time to determine the effects of advertising on Michigan's top-of-mind awareness as a Midwest travel destination.

**The spring 2002 advertising campaign communicates that Michigan is a family destination and a place to relax.** There was an increase in all four markets combined in the agreement with the image that Michigan is: *a great vacation destination for the whole family, great for enjoying quality time with family or friends, a great place to relax and unwind, and a great place to escape my daily routine.* There was also an increase of those who agreed that *Michigan has great beaches.*

- While there is some agreement on with all of the image statements, there may still be room for positive growth in these image impressions. However, pre-to-post improvements in all of the markets suggest that the messages are reaching many in the target markets.

#### **A. Advertising Awareness – Pre vs. Post Comparisons**

Awareness of Michigan travel advertising increases in all markets on all measures from pre- to post-campaign. The ad campaign seems to have reached the target markets.

Since the TV commercials, radio commercials and newspaper insertions were different in the four markets we will look at responses separately by market.

### Chicago Market Area

	<u>Pre-Campaign</u> (296)	<u>Post-Campaign</u> (297)
	%	%
Unaided Awareness	22	<30>
Total Awareness	56	<73>
Guided Awareness	49	<68>

< > Significantly higher than the pre-campaign at the 95% confidence level

- In the Chicago market area, there is an increase in awareness levels in unaided, total, and guided awareness. Three quarters of those in the Chicago market area (73%) say they remember Michigan travel advertising. Guided awareness in this market is slightly lower with 68% of travelers recalling the advertisements as described, suggesting modest “claiming” in the total awareness proportion.

### Cleveland Market Area

	<u>Pre-Campaign</u> (298)	<u>Post-Campaign</u> (300)
	%	%
Unaided Awareness	15	<23>
Total Awareness	56	<76>
Guided Awareness	57	<79>

< > Significantly higher than the pre-campaign at the 95% confidence level

- All awareness levels in the Cleveland market increased significantly. Three quarters of those in the Cleveland market say they remember the Michigan advertising (76%). This percentage increases slightly when a description of the advertising is read to them (79%).

### Indianapolis Market Area

	<u>Pre- Campaign</u>	<u>Post- Campaign</u>
	(297)	(301)
	%	%
Unaided Awareness	12	<25>
Total Awareness	48	<68>
Guided Awareness	45	<66>

< > Significantly higher than the pre-campaign at the 95% confidence level

- Awareness of Michigan travel advertising increased for unaided, total, and guided awareness in the Indianapolis market area with two travelers out of three saying they recall the advertising (68%) and virtually as many recognizing the advertising in the guided sequence (66%).

### Green Bay Market Area

	<u>Pre- Campaign</u>	<u>Post- Campaign</u>
	(296)	(297)
	%	%
Unaided Awareness	15	<31>
Total Awareness	57	<74>
Guided Awareness	49	<74>

< > Significantly higher than the pre-campaign at the 95% confidence level

- Awareness levels also increased in the Green Bay market area with three travelers out of four claiming recall of the Michigan travel advertisements. The Green Bay market was exposed to both the new campaign (radio and magazine) and the old campaign (television and newspaper).

**All Markets: Pre-to-Post Analysis  
Spring 2001 and Spring 2002**

	<b>Spring 2001</b>			<b>Spring 2002</b>		
	<b>Pre-Campaign</b>	<b>Post - Campaign</b>	<b>Pre-to- Post Gap</b>	<b>Pre-Campaign</b>	<b>Post-Campaign</b>	<b>Pre-to- Post Gap</b>
	<b>%</b>	<b>%</b>		<b>%</b>	<b>%</b>	
<b>Chicago Market:</b>	(163)	(252)		(296)	(297)	
Unaided Awareness	14	<28>	+14	22	<30>	+8
Total Awareness	62	<72>	+10	56	<73>	+17
Guided Awareness	71	78	+7	49	<68>	+19
<b>Cleveland Market:</b>	(176)	(258)		(298)	(300)	
Unaided Awareness	15	<27>	+12	15	<23>	+8
Total Awareness	59	<72>	+13	56	<76>	+20
Guided Awareness	70	76	+6	57	<79>	+22
<b>Indianapolis Market:</b>	(202)	(256)		(297)	(301)	
Unaided Awareness	14	<23>	+9	12	<25>	+13
Total Awareness	42	<62>	+20	48	<68>	+20
Guided Awareness	63	70	+7	45	<66>	+21
<b>Green Bay Market:</b>	(200)	(250)		(296)	(297)	
Unaided Awareness	16	<27>	+11	15	<31>	+16
Total Awareness	51	<75>	+24	57	<74>	+17
Guided Awareness	67	<80>	+13	49	<74>	+25

< > Significant at the 95% confidence level