



RFP DEV23TOU10: Domestic Visitation Research & ROI Study Proposal

March 2023

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Overview

Longwoods International is grateful for this opportunity to make a real difference for Ohio by helping TourismOhio create awareness of the state as a great place to visit, live, learn, and work. TourismOhio requires the most current consumer research to inform its tourism marketing efforts to raise awareness on the state, national and international levels of Ohio as a premier travel destination.

With our headquarters in Columbus, Ohio, this state is a core part of our company's DNA, and our long history of conducting essential research throughout the state makes us the ideal strategic partner for TourismOhio in this important work. We are the only Ohio-based company that specializes in travel and tourism market research and appreciative of our partnerships with both the state and multiple destination marketing organizations throughout Ohio. These include Experience Columbus, Destination Cleveland, Destination Toledo, the Cincinnati USA Regional Tourism Network, and the Dayton Convention and Visitors Bureau. Amir Eylon, Longwoods International's President & CEO, and other core personnel are based in Columbus and we have been conducting research for Ohio since 1999. The partnerships and relationships Longwoods International have built and grown throughout Ohio will strongly assist TourismOhio's dedicated efforts in advancing knowledge of the Ohio tourism industry.

Grounded in the best practices with the highest standards of market research, Longwoods International has the well-formulated procedures necessary to conduct well-designed and well-executed research for TourismOhio that is methodologically sound. The strategic implications and recommendations emerging from this research will both logically follow from the findings and be explained thoroughly. Longwoods International prides itself on creating reporting and other documentation that is both accurate and understandable to non-technical readers. Moreover, our work on behalf of TourismOhio will be objective, independent, and balanced, as well as verifiable and defensible to peer review or audit.

To best meet the needs communicated in the RFP, Longwoods International recommends two studies:

Domestic Visitation Research – Travel USA® and Custom Overnight & Day Visitor Research

- The study will have statistically accurate estimates of domestic overnight and day visitor volumes to Ohio, a profile of Ohio's performance within its overnight travel market, a profile of Ohio's overnight marketable trips and travelers, profiles of Ohio's day travel market, and relevant trends in each of these areas.
- Not only will this reporting provide a combination of overnight and day trip data, specific and extensive overnight visitation data will be reported separately from day visitation data.

- Significant portions of this study have year-over-year reporting from 2008 onwards, providing TourismOhio an in-depth understanding of trends over time.
- Ohio's market share will be determined, both nationally and regionally, trended for at least five years.

ROI/Image/Halo Effect Study

- There are three components of this study:
 - The ROI analysis and modeling, which will reveal TourismOhio's return in investment for their campaign, as well as the estimated incremental spending and tax revenues that would not have occurred without the campaign.
 - Image research, where Longwoods measures the reputational lift that both the TourismOhio advertising campaign had, as well as recent visitation, across a thorough list of leisure trip attributes. Additionally, Longwoods measures Ohio's reputation against its key competitive states – Indiana, Kentucky, Michigan, Pennsylvania, and West Virginia.
 - Halo Effect - Measuring the broader economic development TourismOhio's campaign impacts Ohio's reputation as a place to live, learn, and work.
- For the ROI and Image portions of this study, in addition to the overall results, Existing Markets and New Markets (added to the campaign in 2022) will also be reported separately. Longwoods International will also report the share of both Existing Markets and New Markets travelers who positively view Ohio as a place to live, learn, and work.
- Longwoods International has been conducting this research in Ohio since 2021, so we can trend back to that time where applicable.

If awarded this contract, Longwoods International will continue to synergistically work with TourismOhio to further develop questions and deliverables for measurable consumer research of Ohio as a great place to visit, live, learn, and work.

About Longwoods International

Longwoods International is a leading destination tourism market research partner that helps industry clients meet their objectives through our exceptional team, best-in-class strategic partners, groundbreaking research, thought-leading insights and excellent counsel and service.

Established in 1978 as a market research consultancy, Longwoods International has grown into a respected leader within the travel and tourism industry. With offices in Columbus and Toledo, OH, Orlando, and Wisconsin, Longwoods conducts strategic market research for public- and private-sector clients, primarily in the United States and North America. Upon its founding, Dr.

Siegel made his mission simple; develop and execute the most credible, accurate, quality tools and experiences for all aspects of travel marketing research needs. The depth and breadth of travel industry experience in Longwoods leadership is further strengthened by President and CEO Amir Eylon, a seasoned veteran of the travel and tourism industry with over 30 years of experience.

The cornerstone for most market research companies is data collection, be it through online surveys, focus groups, and one-on-one interviews. Longwoods, on the other hand, is an added-value consultancy that is independent of fieldwork. We work with major multinational firms to collect the highest quality data using the most appropriate methodology available. We then apply our expertise to move beyond numbers to strategic insight that helps guide clients' marketplace success. Longwoods has developed a science-based, peer-reviewed methodology for measurement. Soundly grounded in scientific principles, our research methodologies have been peer-reviewed, intensely scrutinized by legislators and the media, and critically evaluated by academics and economists.

Longwoods International is known for a multitude of destination marketing services, especially:

- Overnight and day visitor profiles, including visitor volumes and expenditures, through Travel USA®, the largest American domestic travel study, begun in 1990.
- Destination advertising awareness, return-on-investment on advertising campaigns, and measuring the impact of advertising on a destination's overall image as a leisure trip across over 40 specific attributes.
- "Halo Effect" of destination advertising on the wider field of economic development.
- Resident sentiment research, which investigates both practical and emerging/growing concerns among residents in a destination, including topics such as economic development, perceived environmental impacts, overtourism, and quality of life.
- Custom qualitative and quantitative research.

Strategic Insights

Longwoods International understands TourismOhio will use the results of these studies throughout the community to communicate the importance of TourismOhio's efforts to advance Ohio as a place to visit, live, learn, and work. Please know that Longwoods' involvement will not end with the delivery of this project. Longwoods will work with TourismOhio to develop insights into the key questions that will drive the support of tourism and economic development as well the strengthening the position of Ohio as a place to live, learn, and work. As your research

partner, Longwoods will provide full support as you evaluate and disseminate the results of this research program throughout the community.

Domestic Visitation – Longwoods Travel USA® & Custom Overnight & Day Visitation Study

First conducted in 1990, Travel USA® is the largest ongoing survey of American travelers, providing unparalleled sample size and accuracy for profiling destination visitors. It is conducted online quarterly using Dynata, the leading global survey sample provider.

Destination detail includes all 50 states and the District of Columbia, selected U.S. cities, regions, and foreign destinations. Trip purpose detail is based on Longwoods' occasion-based segmentation model, encompassing 11 types of pleasure trips and 2 types of business trips.

Our prodigious sample size allows you and your marketing partners to target key market segments with the greatest potential for conversion and revenue generation.

Using Longwoods Travel USA®, TourismOhio will receive credible data that is designed and executed to scientifically rigorous standards. It consistently aligns with other credible information sources, including economic impact and hotel data. We stand behind our research and know that it is verifiable and defensible. Over many years it has withstood intense scrutiny by legislators, academics, and the media.

- Unlike other syndicated visitor studies, it samples individuals, not households or panelists who are heads of households. Our objective is to accurately project to the population of U.S. adults 18+. This is a much cleaner way of doing so, as the alternative used by competition is to ask the head of household to provide information about trips taken by others in the household, trips they may not have participated in.
- Visitation to destinations is measured on an aided basis using lists of states, cities, and regions. Respondents simply refer to each list and check off the destinations they have visited each quarter. We believe this to be more accurate than an open-ended write-in approach for specifying destinations used by competition, as it minimizes memory loss and eliminates errors associated with coding and data entry.

- Unlike competition, we collect visitation information separately for overnight and day trips instead of mixing the two types of trips together. Our testing show that this simplifies the task for respondents, and leads to much more accurate recall, especially for less salient day trips.

With our online study, we have the flexibility to simplify the respondent's task by:

- Showing only one question at a time on a separate screen to focus their attention.
- Using skip patterns and drop-down lists so that they are simply asked questions that are appropriate based on their response.
 - For example, respondents are only asked about cities/regions that are relevant to states they have visited.
- Providing maps for regional destinations when required to aid respondents.

Research implications and recommendations are derived logically from the data. Documentation provided is accurate and understandable to non-technical readers.

To develop more in-depth visitor data, a second **Custom Overnight and Day Visitor Study** has been conducted since 2008 immediately after the Travel USA® questionnaire among respondents who visited Ohio. These individuals have been asked to complete a comprehensive 25-minute survey. It includes a map of Ohio and very detailed questions to remind respondents of their travel experiences. Where applicable, data is charted from 2008 to the present to provide TourismOhio with the data essential to track changes over time.

Between the standard and custom Travel USA® surveys, Ohio will receive the key domestic visitor volume and profile research information the organization needs. This includes, but is not limited to: volume of visitors, travel parties, purpose of trip, activity participation, visitor nights, average length of stay, average party size, day and overnight trips, trip timing, trip planning, trip satisfaction, travel frequency, accommodation type, mode of transportation, average trip expenditures, total expenditures, traveler demographic information and origin markets for domestic travel to and within Ohio. The visitor trip volumes and expenditures are presented overall and then broken down into day trips and overnight trips. With the Longwoods Compass crosstabs tool, mentioned below, the profile information can also be easily broken down by age, race, gender, and other relevant demographics.

Both questionnaires ask about the recent travel patterns, and the surveys capture the recent business and pleasure trips taken by the respondents. There are distinct sections for day trips, social media usage, and vacation activities. The data is collected quarterly.

The content of these questionnaires include:

- History of prior visitation.
- Trip planning and booking, information sources used, including both industry and media sources, use of travel agents, welcome centers, and internet options.
- Satisfaction with Ohio information sources.
- Transportation and accommodation used.
- Itinerary within Ohio and specific tourism attractions seen and experienced.
- Perception of Ohio as a destination.
- Likelihood to visit in the next 12 months.
- Perception of Ohio as a place to live, learn, and work and how perceptions change after a day trip to Ohio.
- Perception of Ohio as a place to live, learn, and work and how perceptions change after an overnight trip to Ohio.

When available, this research does include data on year over year changes.

The specific content included in this custom study is provided in the sample questionnaire section of this proposal.

Deliverables

Deliverables from Travel USA® and the Custom Overnight & Day Visitor Study will include:

- Overview of the U.S. travel market (trended for five years).
- Ohio's market share - both nationally and regionally, trended for at least five years.
- Ohio's domestic overnight and day total visitor volumes and expenditures, including average per person trip expenditures.
- Seasonality of trips.
- Ohio's domestic sources of business, i.e. visitor origin markets by state and DMA, trended for five years.
- Ohio travel profile versus the national norm.
- Primary purpose of trip versus the national norm.
- Transportation and accommodations used.
- Size and composition of the travel party, including average travel party size.
- Length of stay by nights for overnight trips, including average.
- Trip planning and booking, including both industry and media sources, use of travel agents, welcome centers, and internet options.
- Social media usage.
- Repeat visitation and travel frequency.

- Satisfaction with Ohio trip and Ohio information sources.
- Perceptions of Ohio as a destination.
- Traveler demographic information.
- Specific Ohio attractions/areas visited.
- Details of the trip experience – including over 70 different sightseeing, recreation, and entertainment activities.
- Likelihood to visit Ohio in the next 12 months.
- Visitors' knowledge of what Ohio offers as a great place to live, learn, and work.
- Measurement of Ohio's ability/reputation to meet the needs of likely movers.

Longwoods will provide a PowerPoint deck that compares Ohio to national norms on the collected measures for the Travel USA® data.

Please note that Longwoods collects overnight and day trip visitor data separately and reports it as such.

Launched in 2019, the Longwoods Compass dashboard is an interactive web-based tool that allows our clients to dig deeper into their data, making exploration and insight generation easier than ever. Compass can be accessed on any internet-connected device which allows clients to move between data points, and apply and remove filters to quickly see trends, comparisons, and segmentation. This tool will allow clients to download full reports for total visitors, as well as different types of visitors by trip segment (visiting friends and relatives, leisure trips, marketable trips, business trips, etc.). Additionally, the user-friendly crosstabs tool allows for easy analysis of data in selecting data splits as well as variable questions to investigate. Crosstabs exports easily into Excel. This tool will allow TourismOhio to conduct custom cross-tabulations quickly and easily. For more information on Compass, please visit this website: <https://longwoods-intl.com/longwoods-compass>

Training will continue to be provided to the TourismOhio staff. The database is only available for the syndicated Travel USA® research and not the Custom Visitor Study. However, tables in Excel are available for the latter component.

Regional Market Share Analyses

As TourismOhio looks to see the effectiveness of each year's spring/summer advertising campaigns, understanding if Ohio gained overall regional share annually for overnight and day visitation is essential. To accomplish this, Longwoods International will conduct Regional Share of Travel analysis.

Longwoods will look at what percentage of total overnight and day visitation Ohio had, in comparison to the combined competitive set of Michigan, Indiana, Kentucky, West Virginia, and Pennsylvania each year. This will be compared to the four previous years to determine what shifts in share have occurred.

To ensure this reporting is correct, Longwoods will model the visitor volumes for these competitor states to ensure Ohio's share of overnight and day visitation is correct.

Experience with Domestic Visitation

Longwoods has conducted the Travel USA® program annually beginning with the 1990 travel year. Since 2007, the research has been conducted through an online panel. This large respondent base of 98,000 completed interviews allows Longwoods International to have the largest base sizes, allowing for statistically valid deeper dives into the data.

In addition to completing over 75 Travel USA® studies annually and serving as the primary visitation data partner for the leading economic impact provider in the U.S., Tourism Economics, Longwoods partners with several important industry associations. Starting in 2016, Destinations International partnered with Longwoods to make the Longwoods Travel USA® data available to its members. In 2019 Longwoods became the official domestic visitation partner for the U.S. Travel Association. The Family Travel Association has also partnered with Longwoods beginning in 2018 to provide visitor profile information to its members. Additionally, Longwoods International provides domestic visitation data to the Bureau of Economic Analysis, U.S. Department of Commerce.

Methodology

Longwoods Travel USA® is conducted employing Dynata's online platform. See "Panel Supplier" section below for more detail on Dynata.

A representative sample of respondents is selected and invited to participate in the research. The panel is geographically and demographically balanced to U.S. Census targets to provide an accurate picture of today's marketplace and to ensure projectability to the U.S. population.

Data from completed questionnaires will be weighted on key variables to ensure they reflect the true proportions found in the originating Longwoods Travel USA® sample. These factors include gender, age, household size, household income and quarter of travel.

The total sample for 2022 Travel USA® is approximately 250,000-person trips.

The 2022 Ohio Travel USA® syndicated visitor study sample size is 4,996 overnight trips and 3,467-day trips. This study will provide estimates of overnight and day visitor spending and

visitor volume for Ohio, as well as trip behavior and demographics of those visitors (including state and DMA of origin).

The sample size for the Custom Overnight and Day Visitor Study will be approximately 1,250 overnight trips and 1,000-day trips.

Timing

This report will be delivered in April the following year. For example, the 2023 travel year reports will be delivered in April 2024.

Domestic Visitation Sample Questionnaires

Travel USA® Questionnaire

The 2023 questionnaire content and report and/or Compass outputs include the following:

For both domestic overnight and day visitation:

- Number of trips to the destination
- Trip expenditures – Overall and for the following sectors: Lodging (overnight only), transportation, restaurant/food/beverage, retail purchases, and recreation/sightseeing/entertainment.
- Quarter trips occurred.
- Visitor origin markets – DMA and state of origin.
- Size, composition, and age of travel party.
- Main purpose of trip - Visiting friends/relatives; touring through a region to experience its scenic beauty, history, and culture; outdoors trip to enjoy activities such as camping, hunting, fishing, hiking, and boating; special event, such as a fair, festival, or sports event; city trip; cruise; casino; theme park, resort (ocean beach, inland or mountain resort), skiing/snowboarding, golfing conference/convention, business trip, combined business/pleasure. For day trips, shopping is also a main purpose of trip option.
- Activities on trip:
 - Cultural activities - Art gallery, visited American Indian community, landmark/historic site, museum, Civil Rights/African American heritage sights/experiences, educational seminar.
 - Business activities - Business meeting, business convention/conference, trade show.
 - Entertainment activities - Live performances (rock/pop concert, opera, symphony, theater, and/or dance), fair/exhibition/festival, shopping, bar/nightclub, casino, spa, theme park, waterpark, zoo, aquarium, sightseeing, winery, brewery, or distillery tour.

- Outdoor activities - Beach/waterfront, biking, boating/sailing, camping, fishing, glamping, hiking/backpacking, hunting, mountain climbing, national/state park, off-roading (ATV/OHV), skiing/snowboarding, swimming, horseback riding, snowmobiling, nature tours/wildlife viewing/birding, motorcycle touring, rafting, rodeo, kayaking/paddleboarding, local parks/playgrounds, extreme/adventure sports, scuba diving/snorkeling.
- Sporting activities- Attended professional/college sports event, attended/participated in an amateur sports event/tournament for adults, attended/participated in a sports event/tournament for kids, attended/participant in a sports event/tournament for youths/teenagers, tennis, golf.
- Other activities - Professional medical services, convention for personal interest, visiting colleges/universities, service/charity/volunteering, attending celebration (anniversary, wedding, reunion, birthday etc.), organized group tour.
- Shopping activities – Outlet/mall, convenience/grocery, souvenir, big box store, antiquing, farmers markets, shopping at locally owned businesses.
- Dining activities - Fine/upscale dining, unique/local food, casual dining, fast food, carry-out/food delivery service, picnicking.
- Activities of special interest on trip - Eco tourism, cultural activities/attractions, historic places/sites/landmarks, exceptional culinary experiences, winery tours and wine tasting, medical tourism, religious travel, wedding, brewery tours/beer tasting, distillery tours and tasting, agritourism, film tourism.
- Demographics of respondents – age, gender, marital status, annual household income, race, Hispanic background, military/veteran status, LGBT status.

The overnight visitation profile also includes:

- Visited before ever/in the past 12 months.
- Length of trip.
- Length of trip planning.
- Transportation used to get to the destination and within the destination.
 - When own car/truck or rental car was used to get to the destination, type of vehicle (electric, plug-in hybrid, hybrid, diesel, gasoline)
- Accommodations used.
- Information sources used during trip planning - Advice from relatives or friends, airline/commercial carrier, auto club/AAA, destination websites, hotel/resort, magazine articles/advertising in magazines, newspaper articles/advertising in newspapers, official travel guides, OTAs/online travel agencies, radio show/advertising on radio, short term rental websites, social media, television program/advertising on TV, travel agent/company, travel guide/other books, travel/ski show or exhibition, visitors bureau/government tourism office, voice activated search.
- How travel was booked - Airline/commercial carrier, auto club/AAA, destination websites, hotel/resort, OTAs/online travel agencies, short term rental websites, travel agent/company, travel/ski show or exhibition, visitors' bureau/government tourism office, voice activated search.

- Visitor satisfaction – Overall satisfaction of the trip experience, and satisfaction with the quality of accommodations, quality of food, friendliness of people, safety/security, cleanliness, sightseeing/attractions, value for money, music/nightlife/entertainment, public transportation, ease of accessibility.
- Social media usage and activities.

Ohio Custom Visitor Questionnaire

The overnight questionnaire content includes:

- Cities and regions in Ohio visited.
- Number of nights in each city or region.
- Main destination of trip.
- Was the trip a special event? If so, which type? (anniversary, wedding, school graduation, etc.)
- Number of miles from home traveled to get to Ohio destination.
- Main purpose of trip (expanded list from Travel USA®).
- Whether part of an escorted group.
- Information sources used to plan the Ohio trip.
- Use of Ohio-specific information sources.
- Stops made at Ohio Tourist Information center.
- Satisfaction with Ohio-specific information sources.
- Length of trip planning.
- Length of trip booking.
- Method of booking.
- Number of nights in each accommodation type.
- Ohio-specific activities experienced on trip including sightseeing, recreation, and entertainment activities.
- Visitation to specific Ohio regional attractions.
- Whether immediate travel party was part of a larger group.
- Age of each travel party member.
- Composition of travel party, including spouse, children, parent, grandchildren, grandparents, other relatives, friends, business associates.
- Who planned the trip?
- Was the trip part of a package? If so, what did the package include, how much? Booked online?
- Types of transportation used inside Ohio.
- Whether trip started in Ohio and stayed there.
- Transportation type used to enter Ohio.
- Transportation type used to exit Ohio.
- Fares to enter or leave Ohio.
- History of prior visitation to Ohio.
- Anything that surprised or delighted the traveler experience in Ohio, and why.
- Amount the immediate travel party spends on travel per year.
- Whether respondent would recommend Ohio to others.

- Likelihood of repeat visit in the next 12 months.
- Following the trip to Ohio, did respondent share their experience, and if so, how and with whom?
- When considering a visit to Ohio, other states considered
- Why did respondent select Ohio?
- Perceptions of Ohio as a place to live, learn, and work, specifically: a good place to attend college, a good place to retire, a good place to live, a good place to start a career, a good place to start a business, a good place to purchase a vacation home, a good place to raise a family, a good place for job opportunities, an affordable cost of living, a vibrant and expanding job market, easy access to amenities, options for outdoor recreation, a thriving economy, close proximity to loved ones, and a wide availability of housing.
- Whether respondent identifies as an ethnic minority, and if so, whether they found Ohio to be a friendly destination.
- Whether respondent identifies as part of the LGBTQ community, and if so, whether they found Ohio a friendly destination.

The day trip questionnaire content includes:

- Cities and regions in Ohio visited.
- Main destination of trip.
- Month and region of business/leisure trip.
- Was the trip a special event? If so, which type?
- Main purpose of trip by month (expanded list from Travel USA®).
- Number of miles from home traveled to get to Ohio destination.
- Whether part of an escorted group.
- Information sources used to plan the Ohio trip.
- Use of Ohio-specific information sources, stops made at Ohio Tourist Information center.
- Satisfaction with Ohio-specific information sources.
- Length of trip planning.
- Length of trip booking.
- Method of booking.
- Visitation to Ohio specific regional attractions.
- Whether immediate travel party was part of a larger group.
- Age of each travel party member.
- Composition of travel party, including spouse, children, parent, grandchildren, grandparents, other relatives, friends, business associates.
- Who planned the trip?
- Was the trip part of a package? If so, what did the package include, how much? Booked online?
- Types of transportation used inside Ohio.
- Whether trip started in Ohio and stayed there.
- Transportation type used to enter Ohio.
- Transportation type used to exit Ohio.

- Fares to enter or leave Ohio.
- History of prior visitation to Ohio.
- Number of times visited Ohio on a day trip in a calendar year.
- Anything that surprised or delighted the traveler experience in Ohio, and why.
- Amount the immediate travel party spends on travel per year.
- Whether respondent would recommend Ohio to others.
- Likelihood of repeat visit in the next year.
- Following the trip to Ohio, did respondent share their experience, and if so, how and with whom?
- When considering a visit to Ohio, other states considered.
- Why did respondent select Ohio?
- Perceptions of Ohio as a place to live, learn, and work, specifically: a good place to attend college, a good place to retire, a good place to live, a good place to start a career, a good place to start a business, a good place to purchase a vacation home, a good place to raise a family, a good place for job opportunities, an affordable cost of living, a vibrant and expanding job market, easy access to amenities, options for outdoor recreation, a thriving economy, close proximity to loved ones, and a wide availability of housing.
- Whether respondent identifies as an ethnic minority, and if so, whether they found Ohio to be a friendly destination.
- Whether respondent identifies as part of the LGBTQ community, and if so, whether they found Ohio a friendly destination.
- Reasons why respondents took day trip, instead of staying overnight.

ROI/Image/Halo Effect Study

ROI/Advertising Effectiveness

The purpose of ROI portion of this study is to accomplish the following:

- Evaluate the success of Ohio's marketing promotion.
- Determine the return on investment (ROI) for Ohio's travel advertising, both in revenue from additional trips and taxes collected.

The ROI/Advertising Effectiveness piece of this research will evaluate the success of Ohio's marketing promotion (such as broadcast, print, digital, and social media efforts) in selected markets. Our goal is to measure the effectiveness of the campaign to understand whether the advertising is:

- Increasing interest in visiting Ohio.
- Driving actual visitation and generating a positive return on investment.

The research we propose will also provide guidance on how well elements of the campaign are working, including messaging and media mix, to help optimize future marketing programs.

Our accountability and advertising evaluation research consists of a benchmark survey to determine:

- Awareness/recall of Ohio advertising.
- Short term impact on trips to Ohio in the year of the campaign.

Specific deliverables from the research would include:

- Awareness of Ohio's advertising in total and by medium.
- Impact of Ohio's advertising on both trips to Ohio during the ad campaign and future trips planned to Ohio because of the campaign.

Regarding the ROI piece of this project, by projecting results to the population of the advertising markets, we will provide estimates of:

- The percent of people in your advertising markets aware of the advertising.
- The number of incremental trips taken to Ohio as a result of advertising in the period from the start of the campaign to the time of the survey.

Our estimate of advertising impacts is conservative since we back out trips that those aware of the advertising would have taken even if they had not seen it.

Estimates of the incremental impact in terms of visitor spending will be calculated by applying visitor spending data from Travel USA®. Other incremental economic impacts, including taxes, can also be estimated based on work from Tourism Economics. The cost of the campaign is then related to the taxes generated to estimate the return on the marketing investment.

Image Research

Longwoods Image Research takes a different approach: one that recognizes emotional engagement as one of the critical drivers of consumer choice.

With an award-winning methodology rooted in the science of experimental psychology, Longwoods image research uncovers the hot buttons – often sub-conscious and usually emotional - that are the true drivers of consumer preferences and purchase behavior. Our research has demonstrated that creative which pushes the right emotional hot buttons can be over 100 times more effective in terms of ROI than creative which misses the emotional mark.

In our Image Research, we will compare Ohio with your five primary competitors (Indiana, Kentucky, Michigan, Pennsylvania, and West Virginia) to determine how your destination measures with each primary and secondary driver that we know that motivates travelers while making trip selections.

With Longwoods Image Research you will:

- Discover the hot buttons, both rational and emotional, that motivate consumers in your market.
- Determine Ohio's strengths and weaknesses compared to your competition.
- Leverage these insights to create powerful brand messages that are in line with the priorities of consumers.

The image data gathered in this study will help keep Ohio abreast of competitive dynamics in an ever-changing marketplace and thereby provide insights to help to fine-tune its marketing strategies and messaging.

The study will specifically profile:

- The key travel motivators for Ohio's advertised markets.
- The image of Ohio in the areas that are important to travelers.
- Ohio's image strengths and weaknesses versus competitors.
- The impact the TourismOhio campaign had on the state's reputation as a leisure travel destination.
- Ohio's image versus its product delivery, as inferred from the image ratings of respondents who have visited Ohio.
- Interest in visiting Ohio vs. competitors.

As long as the Image attribute battery (the 2022 statements are in the sample questionnaire section) remains stable, Longwoods can track the state's reputational progress year-over-year.

Halo Effect

This study will also include a Halo Effect measurement component. It has long been suspected that tourism advertising and visitation has a role in every aspect of economic development, but destination marketers have not had data quantifying that impact-until now. In the past few years, Longwoods has developed new research to quantify the impact of tourism advertising and visitation on economic development for any destination.

The Halo Effect study will demonstrate the expansive role a destination's tourism advertising and visitation plays in boosting the image of that destination for all major economic development objectives, including image as a place to live, to start a business, to start a career, to attend college, to purchase a vacation home, and to retire.

The purpose of the specific research component proposed here is to provide information that will be useful in supporting TourismOhio's position as a key proponent of the Ohio "brand".

The method is straightforward. We add several image rating statements to the survey covering the economic development objectives listed above, then analyze the impacts of advertising recall, recent visitation, and the combination of ad awareness plus visitation on your image in these areas.

Methodology

The study is focused on measurable return on investment research that shows the impact of TourismOhio advertising on choices to visit, live, learn, and work in Ohio.

This research will be conducted by online panel among a statistically representative sample of adults in Ohio's key advertising markets. The sample size would be 2,000 completions annually.

Longwoods splits the Ohio study sample into two categories – Existing Market DMAs (Cincinnati, Cleveland-Akron (Canton), Columbus, Dayton, Lima, Toledo, Youngstown, Detroit, Pittsburgh, Indianapolis, Fort Wayne, Charleston-Huntington, Louisville, Zanesville, Wheeling-Steubenville, Parkersburg, and Lansing) and New Market DMAs (Bluefield-Beckley-Oak Hill, Clarksburg-Weston, Erie, Evansville, Flint-Saginaw-Bay City, Grand Rapids-Kalamazoo-Battle Creek, Harrisburg-Lancaster-Lebanon-York, Johnstown-Altoona-St College, Lexington, South Bend-Elkhart, and Wilkes Barre-Scranton).

Why is this? Because TourismOhio has been building the state's reputation as a place to visit with multiple years of campaigns. The reputational scores are typically higher in existing markets, as is the ROI because of that. Tracking the New Markets performance over time allows TourismOhio to focus on those developments and strategically plan for the future. For this reason, Longwoods creates three reports for TourismOhio every year – Total Markets report, as well as an Existing Markets report and a New Markets report. This way, Tourism Ohio will be able to review the overall and more detailed ROI and Image research as they plan the next year's campaign.

The 25-minute survey will determine:

- Awareness of the annual TourismOhio advertising campaign.
- Short-term conversion, e.g., trips taken as a direct result of the advertising during and immediately following the campaign.
- Intentions to visit in the future.
- Image of Ohio and your five primary competitors (Indiana, Kentucky, Michigan, Pennsylvania, and West Virginia) on the Image attributes listed above.
- Economic development image measures, focusing on Ohio as a place to live, learn, and work (Halo Effect).

Awareness of the advertising is determined by providing respondents with copies of actual advertisements (e.g., MP4's of TV commercials, MP3's of radio ads, jpegs of print and other stationary ads) for recognition purposes. This forced-exposure method controls for potential confusion between the advertising sponsored by TourismOhio and that sponsored by private sector advertisers. For costing purposes related to survey length, we assume that there are no more than 20 distinct advertisements to be tested.

By projecting survey results to the population of the advertising markets, we provide estimates of:

- The number of people in the TourismOhio advertising markets aware of the advertising.
- The number of incremental day and overnight trips taken to Ohio in the period of the campaign (and shortly afterwards) and planned for the following year because of the advertising.
- Demographics of respondents – age, gender, marital status, annual household income, race, Hispanic background, etc.

Experience with ROI

Longwoods' unique, award-winning method - Longwoods R.O.EYE™ - estimates the incremental impact of communications programs on sales. It has been adopted by leading marketers to evaluate campaigns across North America, and has been fielded in Japan, China, South America, Europe, and the U.K. Our methodology has undergone intense scrutiny and won a number of awards for best practices from our peers due to the credible, defensible nature of our findings and insights.

Longwoods has developed a science-based, peer-reviewed methodology for measuring the ROI of advertising. The key is our proprietary control procedures that isolate advertising effects from other factors affecting travel decisions, e.g., the economy, weather, price, etc. This allows us to conservatively estimate incremental trips taken that would not have occurred in the absence of a destination's promotional efforts.

Longwoods employs a unique approach to determine what is important in getting a traveler interested in a specific destination. Instead of asking the respondent what is important, we use an indirect approach to uncovering travel motivators.

Our research has demonstrated that the direct approach often leads to misleading answers. Left-brain, rational, socially acceptable motherhood responses normally dominate. With our predictive modeling approach, we get below the surface veneer of data, and uncover the true consumer motivators and hot buttons. These are usually emotional, not rational, difficult for consumers to articulate, but highly predictive of destination choice.

Key Features of the Longwoods Method

- Online surveys sourcing sample from an established consumer panel organization.
- Representative sample of target audience in your selected regional markets.
- Large-scale benchmark survey conducted at the end of the marketing effort.
- Masking the survey sponsor to minimize “politeness bias” that distorts the ROI estimates.
- Proprietary control procedures to back out the impact of extraneous variables and isolate advertising impacts.
- Conservative estimates of impact of advertising.
- The bottom-line measure is the number of trips influenced by the campaign. To provide financial impacts (i.e., ROI in dollar terms) we will relate incremental trips to visitors' average expenditures and the cost of the campaign.

- Analyze the lift on image, intent to visit, and brand awareness by the campaign overall.
- Measure the relationship between ad awareness and trip taking and these other measures.

Deliverables

Deliverables from the research will include:

- The estimated amount of incremental visitor spending generated from the TourismOhio advertising campaign, that would not have happened without the campaign.
- The amount of tax dollars generated from the incremental spending earned by the TourismOhio advertising campaign.
- Consumer perceptions of Ohio in our advertising markets as a place to attend college, retire, live, start a career, start a business, and raise a family among persons that have not visited Ohio
- Consumer perceptions of Ohio in our advertising markets as a place to attend college, retire, live, start a career, start a business, and raise a family after seeing TourismOhio advertising and visiting Ohio.
- Whether TourismOhio advertising encouraged an out of state consumer to consider moving to Ohio or to make the move to Ohio.
- Whether a visit to Ohio encouraged an out of state consumer to consider moving to Ohio or to move to Ohio.
- Perceptions of Ohio's strengths and weaknesses as a place to live, learn and work including affordability, job opportunities, and outdoor activities.
- Factors that would make a person want to live, learn, and work in Ohio.
- Consumer knowledge of what Ohio offers as a great place to live, learn, and work.
- Measurement of Ohio's ability to meet the needs of likely movers.
- Whether Ohio advertising encouraged/caused a consumer to attend college, start a career, start a business, raise a family, retire, or pursue job opportunities in Ohio,

Each year, three reports will be delivered, providing charts summarizing the data in each area described above, with conclusions and recommendations for future direction:

- Total Markets report – giving the overall results of all key advertising markets surveyed.
- Existing Markets report – focusing on the ROI and Image results for TourismOhio's established advertising markets.
- New Markets report – providing the ROI and Image results for the newer advertising markets TourismOhio entered in 2022.
 - Longwoods will also report the share of both Existing Markets and New Markets travelers who positively view Ohio as a place to live, learn, and work.

A webinar or in-person presentation of results.

Timing

For consistency with past years, Longwoods recommends fielding this study each year in January, approximately 3 months after the campaign ends. This means the final report would be delivered six to nine working weeks after the survey leaves the field, typically in March.

ROI/Image/Halo Effect Study Sample Questionnaire

- How much respondents agree Ohio aligns with each of the following leisure travel attributes:

A place I'd really enjoy visiting	Excellent vacation/getaway value for the money
Not too far away for a vacation/getaway	Has interesting culinary experiences
A great place to vacation/getaway in the summer	Affordable to eat there
A great place to vacation/getaway in the fall	Noted for its unique local food
Truly beautiful scenery	First-class accommodations
Beautiful fall colors	Affordable accommodations
Affordable to get to	Excellent fishing
Excellent for viewing birds	Excellent museums/art galleries
Great for bicycling	Exciting nightlife/entertainment/shows
Great for boating/water sports/sailing	Great for theater and the arts
Good for camping	Great for winery/vineyard touring
Great canoeing/kayaking	Great local microbreweries and beer
Excellent state park facilities	Great local distilleries
Great for hiking/backpacking	Interesting festivals/fairs/events
Good trail systems	Noted for its history
Has high quality sports venues	Warm, friendly people
Interesting cities	Interesting antiques/crafts
Interesting small towns/villages	Great amusement parks
Great for professional/college sports	Great indoor water parks
Great place for walking/strolling about	Well-known destination
Lots to see and do	Popular with vacationers
Has well known landmarks	African Americans would feel welcome
Excellent shopping	Accepting of different cultures, ethnicities, and lifestyles

LGBTQ persons would feel welcome
 Vacation/getaway there is a real adventure
 An exciting place
 Good place to relax
 Safe place to travel in tourist areas
 A fun place for vacation/getaway
 Good place for families to visit
 Children would especially enjoy this place

Good for adult vacation/getaway
 A place I would feel welcome
 A place everyone should visit at least once
 Unique vacation/getaway experience
 Provides opportunities to escape/unwind
 Good for couples
 Options for outdoor recreation

- Respondents also rate two of the competitor states in each of these attributes as well (Ohio's competitive set in this study is Indiana, Kentucky, Michigan, Pennsylvania, and West Virginia.)
- How much respondents agree Ohio aligns with each of the following economic development (live, learn, and work) attributes:

A good place to attend college
 A good place to retire
 A good place to live
 A good place to start a career

A good place to start a business
 A good place to purchase a vacation home
 A good place to raise a family
 A good place for job opportunities

- Respondents also rate two of the competitor states in each of these attributes as well.
- Past overnight and day visitation to Ohio, as well as the competitive states.
- Month and year recent Ohio overnight and day trips occurred in.
- Likely future overnight and day visitation to Ohio and competitive states
- Aided awareness of each of the ads included in the study. Please note ads will be only shown in the DMAs they were deployed in.
- If ads influenced any actions, such as visitation, further research, etc.
- How the ads respondents have seen for Ohio influenced leisure travel plans.
- Demographics of respondents.

Panel Supplier

Dynata

Longwoods International uses an online panel managed by Dynata, the world's leading provider of online, landline phone, mobile/wireless and mixed access sampling, and data collection solutions for survey research.

Dedicated to methodological excellence, Dynata brings nearly four decades of experience to every project, and 20 years of creating and managing online panels.

Please note that Dynata is focused on hiring, developing, promoting, and celebrating diverse talent across their company. They want employees who embody these diverse perspectives and are empowered to make an impact at Dynata and advance their careers. Not only are they focused on our internal diversity and inclusiveness, but they're also focused on making an impact in the industry, from ensuring their panels are diverse to guiding clients on how to be more inclusive in their research.

To ensure optimal outcomes, Dynata adheres to rigorous standards of methodological science. Given the volume of research Longwoods does with Dynata, we consistently work with some of their most experienced personnel.

Justin Huffman
Account Director, Sales
Dynata
Dallas, TX
(469) 816-8815

Justin is the Account Director at Dynata that handles the relationship and responsibility for the Longwoods account. Justin started his career in market research, in 2014 with Dynata, in a beginning sales support capacity. He advanced to various sales roles, throughout his nine year tenure, before becoming an Account Director. Justin is the primary contact as part of the dedicated team servicing the Longwoods account from sales through client services.

More information on Dynata is available on request, or by visiting their web site: www.dynata.com.

Longwoods Client List

- Arizona Office of Tourism
- Arkansas Department of Parks & Tourism
- Arlington CVB
- Breckenridge Tourism Office
- Charlotte Regional Visitors Authority
- Chattanooga Tourism Co.
- Cincinnati USA Regional Tourism Network
- City of Scottsdale
- Coastal Mississippi
- Colorado Tourism Office
- Dayton Convention & Visitors Bureau
- Delaware Tourism Organization
- Denver Metro Convention & Visitors Bureau
- Destination Cleveland
- Destination Madison
- Destination Toledo CVB
- Destinations International
- Discover Durham
- Discover Lehigh Valley
- Discover Long Island
- Discover Panama City
- Discover Puerto Rico
- Experience Columbus
- Explore Asheville
- Explore Minnesota Tourism
- Fredericksburg, TX Convention & Visitor Bureau
- Fresno/Clovis Convention & Visitors Bureau
- Georgia Department of Economic Development
- Grand Junction Visitor & Convention Bureau
- Grand Rapids/Kent County Convention & Visitors Bureau
- Greater Fort Lauderdale CVB
- Greater Kansas City Convention & Visitors Bureau/Visit KC
- Greater Miami Convention & Visitors Bureau
- Greater Orlando Sports Commission
- Happy Valley Adventure Bureau
- Houston First Corporation
- Idaho Department of Commerce, Travel, Leisure and Tourism/ Visit Idaho
- Illinois Office of Tourism
- Indiana Department of Tourism
- Indiana Destination Development Corporation
- Kentucky Department of Tourism
- Lake Charles Convention & Visitors Bureau
- Los Angeles Tourism and Convention Board
- Louisiana Office of Tourism
- Louisiana Travel Association
- Louisville Tourism
- Meet Minneapolis CVB
- MeetNKY
- Mississippi Tourism Development
- Missouri Division of Tourism
- New Mexico Department of

Tourism

- Niagara Tourism & Convention Corporation
- North Dakota Department of Commerce - Tourism Division
- Pocono Mountains Visitors Bureau
- Richmond Region Tourism
- San Francisco Travel
- Shreveport-Bossier Convention & Tourism Bureau
- Sonoma County Tourism
- South Carolina Department of Parks Recreation and Tourism
- South Dakota Department of Tourism
- Southern Indiana, Clark-Floyd Counties Convention and Tourism Bureau
- St. Tammany Parish Tourist & Convention Commission
- State of Washington Tourism
- Theisens Supply Inc
- Tourism Economics
- Tourism Nova Scotia
- Tourism Ohio
- Travel Michigan
- Travel Oregon
- Traverse City Tourism
- U.S. Travel Association
- Virginia Beach Convention and Visitors Bureau
- Virginia Tourism Corporation
- Visit Baltimore
- Visit Buffalo Niagara
- Visit California
- Visit Colorado Springs
- Visit Dallas
- Visit Fort Worth
- Visit Hot Springs
- Visit Jackson
- Visit Longmont
- Visit Macon
- Visit Mesa
- Visit Myrtle Beach
- Visit Philadelphia
- Visit Phoenix
- Visit Pittsburgh
- Visit Raleigh
- Visit Savannah
- Visit Seattle
- Visit Temecula Valley
- Visit Tucson
- Visit Tulsa
- Visit Vacaville
- VisitLex
- West Virginia Department of Tourism
- Wisconsin Department of Tourism

References

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Longwoods Personnel for TourismOhio

Longwoods International is staffed with researchers with extensive experience in destination research and tourism marketing. See below for the team that will work on these projects for TourismOhio.



Amir Eylon, President & CEO

A thirty-five year veteran of the Travel & Tourism industry, Amir leads the entire team responsible for the development and execution of all facets of this premier travel and tourism market research consultancy, from program development to customer acquisition and retention.

He joined Longwoods International from his previous role as Vice President, Partner Engagement with Brand USA, the public-private partnership serving as the destination marketing organization dedicated to increasing international visitation to the US. He led the team responsible for helping to increase Brand USA's partnership base and ensuring that participants received excellent service throughout Brand USA's deployment of joint marketing programs. During his tenure, Brand USA grew its base to 475 partners, comprised of destination marketing organizations, convention and visitor bureaus, attractions, travel brands, airlines, and tour operators.

Prior to joining Brand USA, Amir served as Director of the Ohio Office of Tourism. Under his leadership, the state's marketing programs realized a tremendous return on investment and contributed to the growth of the state's \$40 billion tourism economy. The programs he developed leveraged industry and non-traditional partnerships that generated \$14 in new state and local taxes for every \$1 invested and included active participation by thousands of Ohio's tourism-related businesses. He has also served as Executive Vice President of the Ohio Hotel & Lodging Association, Assistant Director of the Ohio Tourism Division, and Sales & Marketing Manager with the Steuben County Conference and Visitors Bureau.

He has been recognized with a number of Industry honors including: Top 25 Extraordinary Minds in Sales & Marketing award (2014) by the Hospitality Sales and Marketing Association International (HSMAI); The Ohio Tourism Industry's Highest Honor, The Paul Sherlock Award; and The State of Ohio Distinguished Service Medal.

A regular speaker at national and regional conferences, Amir's thought leadership in tourism is often quoted by media, and he has appeared in dozens of interviews among many national media outlets including: CNBC, MSNBC, Forbes, The New York Times, The Washington Post, The Los Angeles Times, etc.

Amir's role for the TourismOhio research is to contribute high level strategic input, and tourism expertise, and senior level client contact. He is based out of Longwoods International's global headquarters in Columbus, OH and has been with the company since 2015.



Anna Blount, Vice President, Research

Anna Blount, Longwoods International's Vice President, Research, manages client relationships and focuses on developing research strategies to obtain tactical insights. She works with destination partners and industry leaders to effectively translate market research into actionable findings and develop recommendations that assist in destination marketing strategies. With over fifteen years' experience in market research, Anna designs, conducts, and reports quantitative and qualitative research projects, primarily focusing on visitation, resident sentiment, and image/brand assessment studies. She is currently a Travel & Tourism Research Association (TTRA) International board member.

Before joining Longwoods, she was the Director of Market Research for MMGY Global, a leading integrated travel and hospitality marketing agency. While there she led the agency's signature Portrait of American Travelers® syndicated research project for six years. Before that, she worked for seven years in the Market Research department of Publix Super Markets, a Fortune 100 company.

Anna earned her Bachelor's degree at the University of South Florida (Tampa, FL) and completed Master's degrees at the University College London and the University of Westminster (London, UK).

Anna will serve as the primary point of contact for TourismOhio and will lead the research analysis and dissemination for Longwoods. She is located in Orlando, FL and has been with Longwoods for almost five years.



Cassandra Ball, Director of Production Services

Cassandra Ball manages the Longwoods International Production team and ensures all quantitative studies follow vigorous market research standards to ensure reliable results and responsible insights. As such, Cassandra is responsible for the management and project flow of Travel USA®. She has lead Production since 2020, and joined Longwoods in 2016, based in the Columbus, Ohio office.

Previously Cassandra worked for the Cooke City Community Council as a grant writer and project manager. She spent three years working for the Colter Pass-Cooke City-Silver Gate Chamber of Commerce and Visitor Center as a travel counselor. Cassandra was also a digital marketing intern at the Valley Forge Tourism and Convention Board.

Cassandra received a Bachelor of Science in Business Administration from Clarion University of Pennsylvania, majoring in Economics and Business Management with a minor in Political Science. She graduated from Temple University in Philadelphia with a Master's degree in Tourism and Hospitality Management with a Marketing concentration.

Cassandra leads the Columbus, Ohio Production team, and leads executing and analyzing the research. She has been with Longwoods for over five years.



Tammy Koerte, Senior Research Manager

Tammy leads the management of individual client research projects and Longwoods International's National Resident Sentiment study. She has extensive academic and professional experience conducting and managing both quantitative and qualitative research studies. Tammy has held this role since 2022 and joined Longwoods International in 2019.

Prior to joining Longwoods International, Tammy was an Extension Educator with the University of Minnesota Tourism Center where she led the Tourism Assessment Program. She was also an instructor at Pennsylvania State University, teaching courses on marketing recreation services.

Tammy holds a Bachelor of Science in Hospitality and Tourism Management from Purdue University and Master's degrees in both Recreation, Park and Tourism Management and Community and Economic Development from Pennsylvania State University. Tammy received the Teaching Excellence Award from Pennsylvania State University. She has been with Longwoods for almost five years.

Tammy will serve as the project manager for these studies.



Victor Feliciano, Vice President

As Longwood International's chief of methodology and analytics, Victor is responsible for developing the visitor volume and expenditure estimates for Travel USA, the analytics for return-on-investment models and the design of ad hoc studies. He has been in his current role for 15 years. Victor has over 30 years of experience as a market researcher.

Before joining Longwoods International, he was Consumer Insight Director at Warner-Lambert, Inc., a global consumer, and pharmaceutical products manufacturer, where he was responsible for several category-leading brands.

Victor holds a Master's degree in Economics from the University of Hawaii. He joined the Longwoods International team in April 2004.

Victor will conduct all ROI and visitor volumes and expenditures estimates modeling for these projects.



Nantha Thayaparan, Data Processing Specialist

Nantha has a university degree in Mathematics and was a mathematics teacher at the high school level prior to joining Longwoods thirty years ago. She is a specialist in database management and is responsible for the data processing side of all our client projects. She handles specifications writing, cross-tabulation of data, multivariate modeling, and segmentation.

Nantha supports Victor for the data entry and cleaning requirements.



Arianna Johnson, Research Analyst

Arianna assists the Longwoods International Production team by providing analytical support on quantitative studies and facilitating the creation of client deliverables. She joined Longwoods in 2023 and is based in the Columbus, Ohio office.

Before joining the Longwoods team, Arianna worked as the SP&D Ad - Ops intern helping the team to track and analyze campaign delivery and performance at Dow Jones. Arianna was also a Social Media and Marketing intern for Yumlish.

Arianna graduated from Indiana University South Bend with a Bachelor of Science in Marketing and Advertising and a minor in Business Analytics.

Arianna supports Cassandra and Tammy in analyses and report creation.

Projects Timing

The planned schedule for the first domestic visitation project, for the 2023 travel year, is as follows:

- Data Collection ends March 2024
- Preliminary data delivered April 2024
- Final reports delivered April 2024

Each year, the reports are scheduled to be delivered in April.

For the ROI/Image/Halo Effect study, for consistency with past years, Longwoods recommends fielding this study each year in January, approximately 3 months after the campaign ends. This means the final report would be delivered six to nine working weeks after the survey leaves the field, typically in March.

Fee Structure

The following chart presents our program element costs for each year:

Program Element	Cost
DOMESTIC VISITATION	
Travel USA® Syndicated Study	\$44,500
Custom Overnight & Day Visitor Research	\$35,000
Regional Market Share Study	\$5,000
ROI STUDY	\$95,000
Total	\$179,500

All work will be billed upon completion and report delivery.

The above quote includes two meetings in Ohio to present the domestic visitation as well as the ROI study results.