

A) PURPOSE

The purpose of this RFQ is to obtain quotations from research firms to study the effectiveness of the regional and national Pure Michigan tourism campaign. This analysis should be able to provide overall ROI, paid media-attributed ROI, as well as campaign effectiveness indicators. The report should also provide strategic marketing insights to guide the campaign's targeting, branding, and communication efforts. The research partner will work closely with the agency partners of the Michigan Economic Development Corporation (MEDC) to identify and develop campaign effectiveness indicators and goals.

The successful research firm will be asked to address the following key components, discussed further under the "Scope of Work" section:

- Brand Perception
- Pre-and-Post campaign lift, brand perception and marketing effectiveness
- Overall campaign and media-attributed ROI
- Competitive assessment
- Audience assessment
- Traveler profiles, life stage and motivators

B) BACKGROUND STATEMENT AND OBJECTIVES

The Michigan Strategic Fund desires to provide critical research for its travel advertising campaign under the Pure Michigan brand. This research will analyze the return on investment of its travel advertising campaign, in addition to providing a comprehensive profile of visitors with an analysis of their perceptions and key motivators.

The MEDC, on behalf of the Michigan Strategic Fund (MSF), serves as the state's marketing arm and lead advocate for business growth, jobs and opportunity with a focus on growing Michigan's economy. Leisure travel initiatives are headed by Travel Michigan which is a business unit within the MEDC and serves as the state's tourism promotion office.

Travel Michigan is the lead on all marketing, public relations, social media, event planning and industry outreach efforts related to leisure travel and tourism within the organization, and the state.

Overview of Michigan's Tourism Industry and Michigan's Tourism Mission

Tourism, as one of the state's largest industries, is crucial to Michigan's economy. According to Tourism Economics, tourism contributed over \$54.8 billion in business sales to the state's economy in 2024. Michigan's 2025 spending on the Pure Michigan campaign totaled \$15.9 million. In 2026 it is \$34 million with \$13 million invested for Spring/Summer media.

The State's tourism mission is to increase visitation through new and repeat visitors to Michigan, while also increasing visitor spending while in Michigan. The overall relevant tourism marketing goals are to:

- Inspire travelers to visit Michigan year-round
- Prove economic impact of Pure Michigan's marketing efforts
- Prove marketing effectiveness of Pure Michigan's marketing efforts
- Support the continued evolution of Pure Michigan's marketing and communications strategy through data-led decisions.

To accomplish its mission and goals, the MSF and MEDC apply an integrated marketing approach that includes media (television, cable, connected TV, radio, streaming audio, podcasts and digital campaigns), print, e-newsletter, search engine optimization, paid search, paid social, outdoor advertising, travel guide (Pure Michigan Travel Guide), public relations, Pure Michigan store, michigan.org, and social media: Facebook, Instagram, Pinterest, TikTok, X and YouTube.

Michigan's relevant target markets are currently categorized in the following ways. Target markets may shift slightly annually based on various factors, including but not limited to campaign objectives, performance and available media budget.

- National: Reaching our audience anywhere in the US
- National with intent targeting: Targets anyone in the US who has showcased a specific behavior or signals that leads us to believe they are intending to travel to Michigan or the Midwest via their online actions.
- In-state: – Alpena, Detroit, Flint, Grand Rapids, Lansing, Marquette, Traverse City
- Out-of-state: – Atlanta, Boston, Chicago, Cincinnati, Cleveland, Columbus, Dallas, Denver, Houston, Indianapolis, Milwaukee, Minneapolis, New York, Philadelphia, Salt Lake City, Seattle, Washington, DC, Fort Wayne, Green Bay, South Bend, Toledo

Previous Research Studies

Travel Michigan, through its previous vendors, has conducted yearly studies assessing the impact of the warm weather season advertising on the national and regional levels since 2004. Travel Michigan has contracted with SMARInsights since 2017 for a report examining the impact of the winter, spring/summer, and fall waves of the Pure Michigan campaign, and reporting details on ROI for those waves and the previous year overall.

According to the report commissioned for insights on the effectiveness of the 2024 campaign, the Pure Michigan campaign influenced over \$1.3 billion in visitor spending in Michigan. The campaign's 2024 ROI was assessed at \$12.22, the highest ROI reported for SMARInsights' research for MEDC and Travel Michigan. This short-term gain in ROI is due, in part, to the lower-than-average media spending on the campaign in 2024; campaign spending in 2025 and 2026 returned to levels seen in previous years.

This RFQ is being issued for similar research on the 2026 advertising campaign. To help accomplish this objective, the MEDC will make available key data from other vendors such as Longwoods International (traveler numbers and characteristics with spending estimates and CoStar and All The Rooms (hotel and short-term rental lodging trends).

C) SCOPE OF WORK

The successful bidder will conduct primary (survey) and secondary market research that culminates in a well-organized, comprehensive, yet concise report providing marketing insights for the 2026 Pure Michigan campaign year in the regional and national markets. At a minimum, these insights should include:

1. Media-Attributed impact of the Pure Michigan campaign
2. Brand Perception (Pre- and Post-Campaign)
3. Campaign Effectiveness and Messaging Resonance
4. Audience Segmentation that aligns with Pure Michigan's audience personas and segmentations
5. Traveler profiles, including life stage and motivators
6. Competitor Assessment

Together, these elements will serve as a guide for the Pure Michigan campaign's targeting, branding, and communication efforts. Below we discuss each scope of work element in more detail.

Campaign Impact on Michigan. Key takeaways from this analysis will be metrics pertaining to the 2026 Pure Michigan campaign's "net-new" impact in the state at *both the regional and national levels*. These measurements should include:

1. Incremental Return on Investment (ROI) – This key metric looks at the difference between 1) state spending on the 2026 Pure Michigan campaign and 2) net-new spending from travel/tourism in the state as a result of the 2026 Pure Michigan campaign.
2. Visitor trips – Net-new trips to the state influenced by the 2026 Pure Michigan campaign.
3. Visitor spending – Spending by net-new visitors on food and beverage, shopping, dining, attractions, music festivals/events, sporting events, theme parks, museums, etc.

Brand/Advertising Perception and Awareness. Results from this analysis should compare the perception of brand awareness by those exposed to the 2026 campaign versus those who were not. Key metrics would include aided awareness, unaided awareness, brand favorability, likelihood to recommend, visitation intent, aided and unaided ad recall, and campaign message association, with results presented by channel type (e.g., ad recall by channel type).

Audience Segmentation. This study should also be able to provide analysis by audience segments defined by MEDC and its agency partners. This analysis should reveal the extent to which the 2026 campaign was able to inspire the audience to learn more about Michigan, research trip logistics to Michigan, plan a trip to Michigan or consider returning to Michigan, and recommend Michigan to others, presented based on various audience segments and customer personas. MEDC's agency partners have designed four customer personas based on life stage and household income.

Competitor Assessment. Results from the competitor assessment should reveal Michigan's relative strengths and weaknesses against top competitor states pertaining to key brand perception

and awareness metrics (i.e., aided/unaided awareness, brand favorability, likelihood to recommend, visitation intent, aided/unaided ad recall, and campaign message association).

MEDC and agency partners have identified the following as Michigan's top competitors for travel/tourism:

1. Illinois
2. Indiana
3. Minnesota
4. Wisconsin
5. Ohio
6. Colorado
7. Massachusetts
8. Kentucky
9. Oregon